

United Arab Emirates Quick Service Restaurant - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The United Arab Emirates Quick Service Restaurant Market size is estimated at USD 5.57 billion in 2024, and is expected to reach USD 13.21 billion by 2029, growing at a CAGR of 18.85% during the forecast period (2024-2029).

Increase in the number of QSRs and rise in demand for fast food to fuel the market growth

- Chained outlets are projected to be the fastest-growing outlet type for the QSR segment, with a CAGR value of 19.29% from 2023 to 2029. Chains like KFC, McDonald's, Popeyes, Jollibee, Pizza Hut, and Domino's have a large footprint in the country. Due to the high demand, chained outlets are most preferred in shopping malls, corporate centers, airports, and railway stations as visitors prefer to dine out or order through chained outlets due to their similar taste experience and a wide range of menus with unique offerings.
- The total number of quick service restaurants reached around 10,300 restaurants in 2022, increasing by more than 1,000 restaurants since 2017. This was due to the increasing number of orders per outlet, which reached 31,000 in 2022 after having slightly declined due to the COVID-19 pandemic, which caused many restaurants to close. The United Arab Emirates is a big fast food consumer, and around 5 million people consumed fast food on a weekly basis in 2022.
- By cuisine, pizza is forecast to be the fastest-growing cuisine type, with a growing CAGR value of 21.03% during the forecast period (2023-2029). This was owing to the high number of international arrivals, which crossed over 14.36 million in 2022. Meat-based cuisines are recording high demand in the country, with consumption reaching around 445,000 tonnes in 2022. Products like fried chicken, chicken wings, meatballs, shawarma, kebab, and other BBQ dishes are highly consumed by both national residents and immigrants in the country. The top quick service chains, such as Albaik, KFC, Texas Chicken, Jollibee, Pickl, Chicken Cottage, Popeye's, and SFC Plus, offer a wide range of meat-based cuisines.

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United Arab Emirates Quick Service Restaurant Market Trends

QSR industry in the UAE grows with the expansion of global brands through franchisee partnerships

- The number of QSRs is expected to increase significantly over the study period, registering a CAGR of 1.82%. The growth is attributed to the expansion of global QSR brands in major urban communities through franchisee plans of action. For instance, brands like Burger King, Buffalo Wild Wings, and Texas Chicken operates under the franchise partner, The Olayan Group. The number of franchised outlets of these brands in 2022 was 61, six, and 40, respectively. Kamal Osman Jamjoom Group LLC is the franchise partner of Subway in the nation, with 167 stores. With the rising number of global brands, QSRs increased in 2022, reaching 10,278 outlets.
- The quick service restaurant market is majorly driven by the meat-based cuisines segment, followed by the burger and bakeries segment. Meat-based foods, including fried chicken, beef patty burgers, chicken cheeseburgers, chicken kebabs, and grilled chicken, are becoming increasingly popular nationwide. More than 71.33% of independent meat-based QSRs have opened in standalone locations in cities, including Al Satwa, Abu Dhabi, Dubai, and Sharjah, to cater to the customers' need for fast and affordable food options. Fast food chains well-known for their meat-based products are Wendy, KFC, McDonald's, and Five Guys, with 17, 30, 119, and 13 outlets, respectively. Locals tend to spend more money on food and beverages. In 2022, the spending on food increased by 15% from 2021. The increasing consumer spending on fast food is raising the number of orders per outlet (which reached an average of 83 per day in 2022), thereby leading to an increase in the number of outlets. In 2022, more than 58.43% of people preferred to eat fast food daily, leading to the opening of several small-scale fast-food outlets.

UAE's QSR industry grows with tourist arrivals, popular dishes include shawarma, kebab, and falafel

- The average number of orders in the market studied is expected to increase over the study period by 0.19%. The average spending on fast food in Dubai is USD 40.84 per day. The local consumer has a strong preference for Arabain street food, which is offered by most small-scale fast-food eateries. Most ordered fast food by the people is regional, including shawarma, kebab, fried chicken, mutton keema sandwich, and falafel, priced at USD 2.72, USD 16.3, USD 5.4, USD 6.2, and USD 8.14, respectively, per 300 gm.
- The growth of the market studied is majorly due to the rising number of tourists. In 2022, Dubai welcomed 14.36 million international overnight visitors compared to 7.28 million tourist arrivals in 2021. Regional as well as American fast food gained popularity. With the rising tourist arrivals, the number of orders, primarily in leisure and travel locations, has surged. The average order value increased from USD 12.23 in 2017 to USD 12.37 in 2022.
- Fast food consumption is high in the nation as more than 47% of the people in the nation visit restaurants daily. The preference for foods like pizza and burgers is growing; more than 32.24% of QSRs offer burgers and pizza. Owing to the high consumption, the revenue of popular QSR brands is increasing. For instance, in 2021, McDonald's revenue in the market studied reached USD 533 million, and Subway's revenue increased to USD 9.4 billion. Owing to the rising inflation rate, which increased by around 1.97-4.83% from 2017 to 2022, and the number of orders per year which increased to more than 30,428 in 2022, the average order value is anticipated to continue in its growth trajectory.

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United Arab Emirates Quick Service Restaurant Industry Overview

The United Arab Emirates Quick Service Restaurant Market is fragmented, with the top five companies occupying 1.73%. The major players in this market are ALBAIK Food Systems Company S.A., Alghanim Industries & Yusuf A. Alghanim & Sons WLL, Americana Restaurants International PLC, M.H. Alshaya Co. WLL and The Olayan Group (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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