

Staple Foods in Egypt

November 2023

Table of Contents

Staple Foods in Egypt

EXECUTIVE SUMMARY

Staple foods in 2023: The big picture

Key trends in 2023

Competitive landscape

Channel developments

What next for staple foods?

MARKET DATA

Table 1 - Sales of Staple Foods by Category: Volume 2018-2023

Table 2 - Sales of Staple Foods by Category: Value 2018-2023

Table 3 - Sales of Staple Foods by Category: % Volume Growth 2018-2023

Table 4 - Sales of Staple Foods by Category: % Value Growth 2018-2023

Table 5 - NBO Company Shares of Staple Foods: % Value 2019-2023

Table 6 - LBN Brand Shares of Staple Foods: % Value 2020-2023

Table 7 - Penetration of Private Label by Category: % Value 2018-2023

Table 8 - Distribution of Staple Foods by Format: % Value 2018-2023

Table 9 - Forecast Sales of Staple Foods by Category: Volume 2023-2028

Table 10 - Forecast Sales of Staple Foods by Category: Value 2023-2028

Table 11 - Forecast Sales of Staple Foods by Category: % Volume Growth 2023-2028

Table 12 - Forecast Sales of Staple Foods by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baked Goods in Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Faster current value than volume growth in the wake of price increases

Heightened importance of hygiene in bakeries

Innovative strategies to extend shelf life and reduce returns

PROSPECTS AND OPPORTUNITIES

Baked goods to continue to benefit from key staple positioning in households

Unpackaged bread to grow faster than packaged bread

Edita Food Industries well placed to remain the leader in a fragmented competitive landscape

CATEGORY DATA

Table 13 - Sales of Baked Goods by Category: Volume 2018-2023

Table 14 - Sales of Baked Goods by Category: Value 2018-2023

Table 15 - Sales of Baked Goods by Category: % Volume Growth 2018-2023

Table 16 - Sales of Baked Goods by Category: % Value Growth 2018-2023

Table 17 - Sales of Pastries by Type: % Value 2018-2023

Table 18 - NBO Company Shares of Baked Goods: % Value 2019-2023

Table 19 - LBN Brand Shares of Baked Goods: % Value 2020-2023

Table 20 - Distribution of Baked Goods by Format: % Value 2018-2023

Table 21 - Forecast Sales of Baked Goods by Category: Volume 2023-2028

Table 22 - Forecast Sales of Baked Goods by Category: Value 2023-2028

Table 23 - Forecast Sales of Baked Goods by Category: % Volume Growth 2023-2028

Table 24 - Forecast Sales of Baked Goods by Category: % Value Growth 2023-2028

Breakfast Cereals in Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

The rising cost of living has a strong effect on the affordability of breakfast cereals

Price-sensitive consumers look to discounters for breakfast cereals

From niche to mainstream: Local brands are gaining popularity in Egypt

PROSPECTS AND OPPORTUNITIES

Fast, healthy breakfast options to push sales

The lack of price controls produces push-pull factors

Mass Food Co to invest in marketing and promotions to maintain a competitive edge

CATEGORY DATA

Table 25 - Sales of Breakfast Cereals by Category: Volume 2018-2023

Table 26 - Sales of Breakfast Cereals by Category: Value 2018-2023

Table 27 - Sales of Breakfast Cereals by Category: % Volume Growth 2018-2023

Table 28 - Sales of Breakfast Cereals by Category: % Value Growth 2018-2023

Table 29 - NBO Company Shares of Breakfast Cereals: % Value 2019-2023

Table 30 - LBN Brand Shares of Breakfast Cereals: % Value 2020-2023

Table 31 - Distribution of Breakfast Cereals by Format: % Value 2018-2023

Table 32 - Forecast Sales of Breakfast Cereals by Category: Volume 2023-2028

Table 33 - Forecast Sales of Breakfast Cereals by Category: Value 2023-2028

Table 34 - Forecast Sales of Breakfast Cereals by Category: % Volume Growth 2023-2028

Table 35 - Forecast Sales of Breakfast Cereals by Category: % Value Growth 2023-2028

Processed Fruit and Vegetables in Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Processed fruit and vegetables enjoy healthier and affordable food image amidst soaring meat prices

Convenience plays a key role in driving demand

Retail e-commerce continues to emerge in processed fruit and vegetables

PROSPECTS AND OPPORTUNITIES

Bright outlook for processed fruit and vegetables

Manufacturers to adapt to higher costs and demand challenges by looking to exports

Americana Egypt well placed to remain the leader in processed fruit and vegetables

CATEGORY DATA

Table 36 - Sales of Processed Fruit and Vegetables by Category: Volume 2018-2023

Table 37 - Sales of Processed Fruit and Vegetables by Category: Value 2018-2023

Table 38 - Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2018-2023

Table 39 - Sales of Processed Fruit and Vegetables by Category: % Value Growth 2018-2023

Table 40 - Sales of Frozen Processed Vegetables by Type: % Value Breakdown 2018-2023

Table 41 - NBO Company Shares of Processed Fruit and Vegetables: % Value 2019-2023

Table 42 - LBN Brand Shares of Processed Fruit and Vegetables: % Value 2020-2023

Table 43 - Distribution of Processed Fruit and Vegetables by Format: % Value 2018-2023

Table 44 - Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2023-2028

Table 45 - Forecast Sales of Processed Fruit and Vegetables by Category: Value 2023-2028

Table 46 - Forecast Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2023-2028

Table 47 - Forecast Sales of Processed Fruit and Vegetables by Category: % Value Growth 2023-2028

Processed Meat, Seafood and Alternatives To Meat in Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Price hikes boost retail value sales at the expense of retail volume sales

Downsizing to afford processed meat and seafood

High prices, supply issues and low variety and innovation hinder processed seafood

PROSPECTS AND OPPORTUNITIES

Convenience vs cost to inform the performance of processed meat

Government's import strategy aims to alleviate the pressure on processed meat in Egypt

Halwani aims to offer quality and innovations at affordable prices

CATEGORY DATA

Table 48 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2018-2023

Table 49 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2018-2023

Table 50 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2018-2023

Table 51 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2018-2023

Table 52 - Sales of Shelf Stable Processed Red Meat by Type: % Volume Breakdown 2018-2023

Table 53 - Sales of Chilled Processed Red Meat by Type: % Volume Breakdown 2018-2023

Table 54 - Sales of Frozen Processed Red Meat by Type: % Volume Breakdown 2018-2023

Table 55 - Sales of Frozen Processed Poultry by Type: % Value Breakdown 2018-2023

Table 56 - Sales of Frozen Processed Seafood by Type: % Value Breakdown 2018-2023

Table 57 - NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2019-2023

Table 58 - LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2020-2023

Table 59 - Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: % Value 2018-2023

Table 60 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2023-2028

Table 61 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2023-2028

Rice, Pasta and Noodles in Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rising demand for affordable meals fosters consumption of rice, pasta and noodles

Noodles become go-to options for budget-conscious consumers

Government price-fixing impacts rice offer in Egypt

PROSPECTS AND OPPORTUNITIES

Rice, pasta and noodles demand to grow apace over the forecast period

The government aims to ensure a stable supply

Al Doha Co for Processing & Distribution enters the forecast period in a strong position

CATEGORY DATA

Table 62 - Sales of Rice, Pasta and Noodles by Category: Volume 2018-2023

Table 63 - Sales of Rice, Pasta and Noodles by Category: Value 2018-2023

Table 64 - Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2018-2023

Table 65 - Sales of Rice, Pasta and Noodles by Category: % Value Growth 2018-2023

Table 66 - Sales of Instant Noodles by Leading Flavours: Rankings 2018-2023

Table 67 - NBO Company Shares of Rice, Pasta and Noodles: % Value 2019-2023

Table 68 - LBN Brand Shares of Rice, Pasta and Noodles: % Value 2020-2023

Table 69 - NBO Company Shares of Rice: % Value 2019-2023

Table 70 - LBN Brand Shares of Rice: % Value 2020-2023

Table 71 - NBO Company Shares of Pasta: % Value 2019-2023

Table 72 - LBN Brand Shares of Pasta: % Value 2020-2023

Table 73 - NBO Company Shares of Noodles: % Value 2019-2023

Table 74 - LBN Brand Shares of Noodles: % Value 2020-2023

Table 75 - Distribution of Rice, Pasta and Noodles by Format: % Value 2018-2023

Table 76 - Distribution of Rice by Format: % Value 2018-2023

Table 77 - Distribution of Pasta by Format: % Value 2018-2023

Table 78 - Distribution of Noodles by Format: % Value 2018-2023

Table 79 - Forecast Sales of Rice, Pasta and Noodles by Category: Volume 2023-2028

Table 80 - Forecast Sales of Rice, Pasta and Noodles by Category: Value 2023-2028

Table 81 - Forecast Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2023-2028

Table 82 - Forecast Sales of Rice, Pasta and Noodles by Category: % Value Growth 2023-2028

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/staple-foods-in-egypt/report.