

Consumer Foodservice in Middle East and Africa

August 2023

Table of Contents

INTRODUCTION

Scope

Key findings

REGIONAL OVERVIEW

Limited-service restaurants as popular as full-service restaurants in Middle East and Africa

Middle East and Africa has the fifth biggest market and lowest per capita spend

Positive growth expected, but 2019 sales levels not expected again until 2025

Inflation driving up costs for industry players

Full-service restaurants a major loser over 2017-2022 in Saudi Arabia

Eat-in reclaiming some of the share lost in 2020, but no return to pre-pandemic levels

Full-service restaurants and cafés/bars the biggest losers over 2017-2022

Vision 2030 and resumption of religious pilgrimages boost the Saudi Arabian performance

Saudi Arabia and United Arab Emirates hop on the back of the Qatar World Cup

Robot waiters as a solution to staff shortages in Israel

LEADING COMPANIES AND BRANDS

Consumer foodservice has a very fragmented competitive landscape in most countries

Major chained players managed to gain share during the pandemic

Saudi Arabia the main revenue generator for half of the region's top 10 players

Spur Steak Branches back in the top 10 brands

FORECAST PROJECTIONS

Positive growth expected as recovery continues to be seen in regional sales

Vision 2030 should help to continue driving growth in Saudi Arabia

Online ordering expected to see healthy growth in Nigeria in the coming years

South Africa's PayShap, part of Vision 2025, should facilitate easier payments

COUNTRY SNAPSHOTS

Egypt: Market Context

Egypt: Competitive and Retail Landscape

Israel: Market Context

Israel: Competitive and Retail Landscape

Morocco: Market Context

Morocco: Competitive and Retail Landscape

Nigeria: Market Context

Nigeria: Competitive and Retail Landscape

Saudi Arabia: Market Context

Saudi Arabia: Competitive and Retail Landscape

South Africa: Market Context

South Africa: Competitive and Retail Landscape

United Arab Emirates: Market Context

United Arab Emirates: Competitive and Retail Landscape

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/consumer-foodservice-in-middle-east-and-africa/report.