

# **Staple Foods in the United Arab Emirates**

Euromonitor International December 2021

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# STAPLE FOODS IN THE UNITED ARAB EMIRATES - INDUSTRY OVERVIEW

# **EXECUTIVE SUMMARY**

Staple foods in 2021: The big picture

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Key trends in 2021

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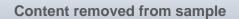
Competitive landscape

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# Channel developments

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## What next for staple foods?



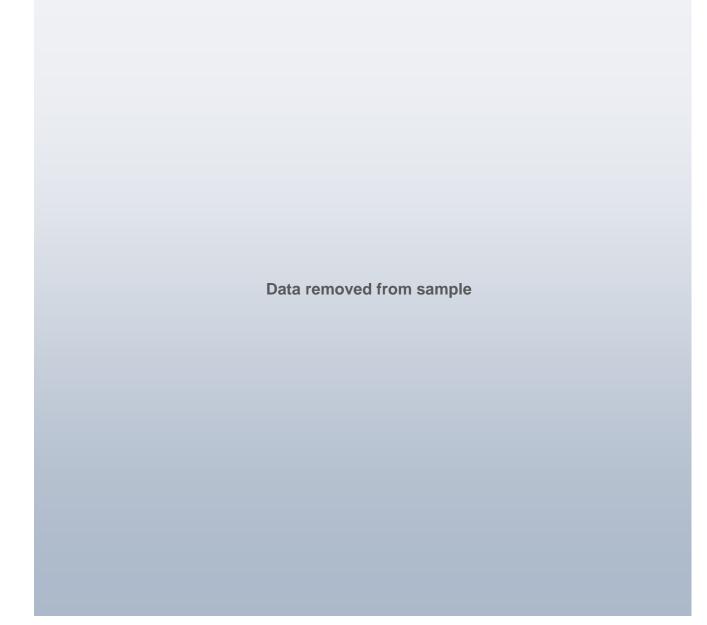
# **MARKET DATA**

#### Table 1 Sales of Staple Foods by Category: Volume 2016-2021 '000 tonnes 2016 2017 2020 2021 2018 2019 Baked Goods **Breakfast Cereals** Data removed from sample Processed Fruit and Vegetables Processed Meat, Seafood and Alternatives to Meat Rice, Pasta and Noodles Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources Table 2 Sales of Staple Foods by Category: Value 2016-2021 AED million 2016 2017 2018 2019 2020 2021 Baked Goods **Breakfast Cereals** Processed Fruit and Data removed from sample Vegetables Processed Meat, Seafood

and Alternatives to Meat Rice, Pasta and Noodles	Data removed from sample							
Source: Euromonitor International from store checks, trade interviews		ssociations, trad	e press, co	mpany research,				
Table 3         Sales of Staple Foods by Category: % Volume Growth 2016-2021								
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Staple Foods Baked Goods Breakfast Cereals Processed Fruit and Vegetables Processed Meat, Seafood and Alternatives to Meat Rice, Pasta and Noodles	Data removed from sample							
Source: Euromonitor International from store checks, trade interviews		ssociations, trad	e press, co	mpany research,				
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Source: Euromonitor International from store checks, trade interviews		ssociations, trad	e press, co	ompany research,				
Table 5 NBO Company Sł	nares of Staple Foods	s: % Value 20	17-2021					
% retail value rsp Company	2	2017 2	018	2019	2020	2021		
	Data remov	/ed from s	ample					



Table 6LBN Brand Shares of Staple Foods: % Value 2018-2021					
% retail value Brand (GBO)	sp Company (NBO)	2018	2019	2020	2021
	Data removed	d from samn			
Data removed from sample					



#### Table 7 Penetration of Private Label by Category: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Baked Goods Processed Fruit and Vegetables Processed Meat, Seafood		Data	removed	from san	nple	

# and Alternatives to Meat Rice, Pasta and Noodles

# Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

## Table 8 Distribution of Staple Foods by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing - Grocery Retailers Modern Grocery Retailers Convenience Stores Discounters Forecourt Retailers Forecourt Retailers Hypermarkets Supermarkets Traditional Grocery Retailers Food/drink/tobacco specialists Independent Small Grocers Other Grocery Retailers Other Grocery Retailers Other Grocery Specialists Health and Beauty Specialist Retailers Other Foods Non- Grocery Specialists Mixed Retailers Non-Store Retailing - Vending - Homeshopping - E-Commerce - Direct Selling Total		Dat	a remove	d from sa	mple	

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

#### Table 9 Forecast Sales of Staple Foods by Category: Volume 2021-2026

'000 tonnes	2021	2022	2023	2024	2025	2026
Baked Goods Breakfast Cereals Processed Fruit and Vegetables Processed Meat, Seafood and Alternatives to Meat Rice, Pasta and Noodles		Data	a removed	d from sar	nple	

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

#### Table 10 Forecast Sales of Staple Foods by Category: Value 2021-2026

AED million	2021	2022	2023	2024	2025	2026
Baked Goods Breakfast Cereals Processed Fruit and Vegetables Processed Meat, Seafood and Alternatives to Meat Rice, Pasta and Noodles		Data	removed	l from san	nple	

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

#### Table 11 Forecast Sales of Staple Foods by Category: % Volume Growth 2021-2026

% volume growth	2021/22	2021-26 CAGR	2021/26 Total
Staple Foods Baked Goods Breakfast Cereals Processed Fruit and Vegetables Processed Meat, Seafood and Alternatives to Meat Rice, Pasta and Noodles	Dat	ta removed fror	n sample
Source: Euromonitor International from trade associations, trade pre-	es company res	earch trade interviews	

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

#### Table 12 Forecast Sales of Staple Foods by Category: % Value Growth 2021-2026

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
Staple Foods Baked Goods Breakfast Cereals Processed Fruit and Vegetables Processed Meat, Seafood and Alternatives to Meat Rice, Pasta and Noodles	Da	ta removed fro	m sample
		1 1 1 1 1 1	

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

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# **SOURCES**

Sources used during research include the following:

Summary 1 Research Sources
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Source: Euromonitor International

# BAKED GOODS IN THE UNITED ARAB EMIRATES - CATEGORY ANALYSIS

# **KEY DATA FINDINGS**

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# **2021 DEVELOPMENTS**

Return to foodservice and increasing mobility reverse 2020 category dynamics

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Dessert mixes experiences A drop compared to 2020's exponential growth

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# **PROSPECTS AND OPPORTUNITIES**

Healthy claims to inspire innovation and the launch of new products

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Bricks-and-mortar appeal remains strong for consumers seeking fresh hot bakery items

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# **CATEGORY DATA**

Table 13 Sal	e 13 Sales of Baked Goods by Category: Volume 2016-2021								
'000 tonnes		2016	2017	2018	2019	2020	2021		
Baked Goods Bread - Flat Bread Packaged Flat Br Unpackaged Flat - Leavened Bread Packaged Leave Bread Unpackaged Lea Bread Cakes - Packaged Cakes - Unpackaged Cakes	t Bread ened avened		Dat	a remove	d from sa	mple			

Dessert Mixes Frozen Baked Goods Pastries - Packaged Pastries - Unpackaged Pastries

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

#### Table 14 Sales of Baked Goods by Category: Value 2016-2021

AED million	2016	2017	2018	2019	2020	2021
Baked Goods Bread - Flat Bread - Packaged Flat Bread - Unpackaged Flat Bread - Leavened Bread - Packaged Leavened Bread - Unpackaged Leavened Bread Cakes - Packaged Cakes - Packaged Cakes Dessert Mixes Frozen Baked Goods Pastries - Packaged Pastries - Unpackaged Pastries		Dat	a remove	d from sa	mple	

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

#### Table 15 Sales of Baked Goods by Category: % Volume Growth 2016-2021

% volume growth 202	20/21	2016-21 CAGR	2016/21 Total
Baked Goods Bread - Flat Bread - Packaged Flat Bread - Unpackaged Flat Bread - Leavened Bread - Packaged Leavened Bread - Unpackaged Leavened Bread Cakes - Packaged Cakes - Packaged Cakes Dessert Mixes Frozen Baked Goods Pastries - Packaged Pastries - Unpackaged Pastries	Data	a removed from	sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

#### Table 16Sales of Baked Goods by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Baked Goods Bread - Flat Bread - Packaged Flat Bread - Unpackaged Flat Bread - Leavened Bread - Packaged Leavened Bread - Unpackaged Leavened Bread Cakes - Packaged Cakes - Packaged Cakes Dessert Mixes Frozen Baked Goods Pastries - Packaged Pastries - Unpackaged Pastries	[	Data removed fr	om sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

## Table 17 NBO Company Shares of Baked Goods: % Value 2017-2021

% retail value rsp					
Company	2017	2018	2019	2020	2021

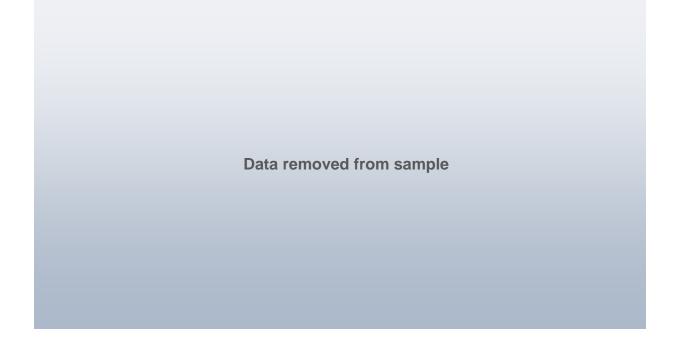
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#### Table 18LBN Brand Shares of Baked Goods: % Value 2018-2021

% retail value rsp					
Brand (GBO)	Company (NBO)	2018	2019	2020	2021

Data removed from sample



# Table 19 Distribution of Baked Goods by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing - Grocery Retailers Modern Grocery Retailers Convenience Stores Discounters Forecourt Retailers Hypermarkets Supermarkets Traditional Grocery Retailers Food/drink/tobacco specialists Independent Small Grocers Other Grocery Retailers - Non-Grocery Specialists Health and Beauty Specialist Retailers Other Foods Non- Grocery Specialists - Mixed Retailers		Dat	a remove	d from sa	mple	



## Table 20 Forecast Sales of Baked Goods by Category: Volume 2021-2026

'000 tonnes	2021	2022	2023	2024	2025	2026
Baked Goods Bread - Flat Bread Packaged Flat Bread Unpackaged Flat Bread - Leavened Bread Packaged Leavened Bread Unpackaged Leavened Bread Cakes - Packaged Cakes - Packaged Cakes Dessert Mixes Frozen Baked Goods Pastries - Packaged Pastries - Unpackaged Pastries		Data	a removed	l from sar	nple	

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

#### Table 21 Forecast Sales of Baked Goods by Category: Value 2021-2026

AED million	2021	2022	2023	2024	2025	2026
Baked Goods Bread - Flat Bread - Packaged Flat Bread - Unpackaged Flat Bread - Leavened Bread - Packaged Leavened Bread - Unpackaged Leavened Bread Cakes - Packaged Cakes - Dackaged Cakes Dessert Mixes Frozen Baked Goods Pastries - Packaged Pastries		Data	ı removed	l from san	nple	

#### - Unpackaged Pastries

trade sources

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

## Table 22Forecast Sales of Baked Goods by Category: % Volume Growth 2021-2026

% volume growth	2021/22	2021-26 CAGR	2021/26 Total
Baked Goods Bread - Flat Bread - Packaged Flat Bread - Unpackaged Flat Bread - Leavened Bread - Leavened Bread - Packaged Leavened Bread Cakes - Packaged Cakes - Packaged Cakes Dessert Mixes Frozen Baked Goods Pastries - Packaged Pastries - Unpackaged Pastries	Dat	ta removed fror	n sample
Source: Euromonitor International from trade associations, trade press	s, company rese	earch, trade interviews,	

#### Table 23 Forecast Sales of Baked Goods by Category: % Value Growth 2021-2026

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
Baked Goods Bread - Flat Bread Packaged Flat Bread Unpackaged Flat Bread - Leavened Bread Packaged Leavened Bread Cakes - Packaged Cakes - Packaged Cakes Dessert Mixes Frozen Baked Goods Pastries - Packaged Pastries - Unpackaged Pastries		ta removed fror	n sample
Source: Euromonitor International from trade associations, trade pr	ass company res	earch trade interviews	

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

# BREAKFAST CEREALS IN THE UNITED ARAB EMIRATES -CATEGORY ANALYSIS

# **KEY DATA FINDINGS**

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# **2021 DEVELOPMENTS**

Foodservice reopening sets the tone for strong performance

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Essential versus non-essential paradox impacts category performance

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Nostalgic indulgence supports growth during pandemic

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# **PROSPECTS AND OPPORTUNITIES**

Health-centric offers pave the way for category innovation

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Adopting e-commerce purchases leverages growth possibilities

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Sales of Breakfast Cereals by Category: Volume 2016-2021

# **CATEGORY DATA**

Table 24

'000 tonnes	2016	2017	2018	2019	2020	2021
Breakfast Cereals Hot Cereals RTE Cereals - Children's Breakfast Cereals - Family Breakfast Cereals		Dat	ta remove	d from sa	mple	

-- Flakes

-- Muesli and Granola

-- Other RTE Cereals

# Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

#### Table 25 Sales of Breakfast Cereals by Category: Value 2016-2021

AED million	2016	2017	2018	2019	2020	2021
Breakfast Cereals Hot Cereals RTE Cereals - Children's Breakfast Cereals - Family Breakfast Cereals Flakes Muesli and Granola Other RTE Cereals		Data	a removed	l from san	nple	

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

#### Table 26 Sales of Breakfast Cereals by Category: % Volume Growth 2016-2021

% volume growth	2020/21	2016-21 CAGR	2016/21 Total
Breakfast Cereals Hot Cereals RTE Cereals - Children's Breakfast Cereals - Family Breakfast Cereals Flakes Muesli and Granola Other RTE Cereals	Dat	ta removed fror	n sample
Sources Euromanitar International from official statistics, trade access	intional trada pro	an annany ranarah	

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

#### Table 27 Sales of Breakfast Cereals by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Breakfast Cereals Hot Cereals RTE Cereals - Children's Breakfast Cereals - Family Breakfast Cereals Flakes Muesli and Granola Other RTE Cereals	Da	ta removed from	n sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

# % retail value rsp Company 2017 2018 2019 2020 2021 Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

#### Table 29 LBN Brand Shares of Breakfast Cereals: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021				
	Data removed from sample								

#### Table 28 NBO Company Shares of Breakfast Cereals: % Value 2017-2021

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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing - Grocery Retailers Modern Grocery Retailers Convenience Stores Discounters Forecourt Retailers Hypermarkets Supermarkets Traditional Grocery Retailers Food/drink/tobacco specialists Independent Small Grocers Other Grocery Retailers Non-Grocery Specialists Health and Beauty Specialist Retailers Other Foods Non- Grocery Specialists Mixed Retailers Non-Store Retailing - Vending - Homeshopping - E-Commerce - Direct Selling Total		Data	a remove	d from sa	mple	

#### Table 30 Distribution of Breakfast Cereals by Format: % Value 2016-2021

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

## Table 31 Forecast Sales of Breakfast Cereals by Category: Volume 2021-2026

'000 tonnes	2021	2022	2023	2024	2025	2026
Breakfast Cereals Hot Cereals RTE Cereals - Children's Breakfast Cereals - Family Breakfast Cereals Flakes Muesli and Granola Other RTE Cereals		Data	a removec	l from sar	nple	

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

## Table 32 Forecast Sales of Breakfast Cereals by Category: Value 2021-2026

AED million	2021	2022	2023	2024	2025	2026
Breakfast Cereals Hot Cereals RTE Cereals - Children's Breakfast Cereals - Family Breakfast Cereals Flakes Muesli and Granola Other RTE Cereals		Dat	a remove	d from sa	mple	
Source: Euromonitor International from trade	associations ti	rade press com	hanv research ti	rade interviews		

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

## Table 33 Forecast Sales of Breakfast Cereals by Category: % Volume Growth 2021-2026

% volume growth	2021/22	2021-26 CAGR	2021/26 Total
Breakfast Cereals Hot Cereals RTE Cereals - Children's Breakfast Cereals - Family Breakfast Cereals Flakes Muesli and Granola Other RTE Cereals	Da	ta removed fro	m sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

## Table 34 Forecast Sales of Breakfast Cereals by Category: % Value Growth 2021-2026

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total	
Breakfast Cereals Hot Cereals RTE Cereals - Children's Breakfast Cereals - Family Breakfast Cereals Flakes Flakes Muesli and Granola Other RTE Cereals	Da	ata removed fro	om sample	
Source: Euromonitor International from trade associations, trade pro		arch trada interviewe		

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

# PROCESSED FRUIT AND VEGETABLES IN THE UNITED ARAB EMIRATES - CATEGORY ANALYSIS

# **KEY DATA FINDINGS**

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# **2021 DEVELOPMENTS**

Shelf stable segment experiences reverse consumption trend in 2021

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E-commerce exposure creates new horizons for frozen processed fruit

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# **PROSPECTS AND OPPORTUNITIES**

Health-centric consumers to boost demand over the forecast period

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Strong growth prospects for frozen processed potatoes over forecast period

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# **CATEGORY DATA**

 Table 35
 Sales of Processed Fruit and Vegetables by Category: Volume 2016-2021

'000 tonnes	2016	2017	2018	2019	2020	2021
Processed Fruit and Vegetables Shelf Stable Fruit and Vegetables - Shelf Stable Beans - Shelf Stable Fruit - Shelf Stable Tomatoes - Shelf Stable Vegetables Frozen Processed Fruit and Vegetables - Frozen Fruit - Frozen Processed		Data	removed	from sam	nple	

	oes n Processed tables	Data removed from sample
Source:	Euromonitor International from official store checks, trade interviews, trade s	statistics, trade associations, trade press, company research, sources
Table 3	6 Sales of Processed Frui	t and Vegetables by Category: Value 2016-2021

AED million	2016	2017	2018	2019	2020	2021
Processed Fruit and Vegetables Shelf Stable Fruit and Vegetables - Shelf Stable Beans - Shelf Stable Fruit - Shelf Stable Tomatoes - Shelf Stable Vegetables Frozen Processed Fruit and Vegetables - Frozen Fruit - Frozen Processed Potatoes - Frozen Processed Vegetables		Data	a removed	d from sar	nple	

# Table 37Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2016-2021

% volume growth	2020/21	2016-21 CAGR	2016/21 Total
Processed Fruit and Vegetables Shelf Stable Fruit and Vegetables - Shelf Stable Beans - Shelf Stable Fruit - Shelf Stable Tomatoes - Shelf Stable Vegetables Frozen Processed Fruit and Vegetables - Frozen Fruit - Frozen Processed Potatoes - Frozen Processed Vegetables	Da	ta removed from	n sample
Occurrence Economic a lateral discussion of finite lateration in the descent inti-	laine Aneile inner		

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

# Table 38Sales of Processed Fruit and Vegetables by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Processed Fruit and Vegetables	Data	removed from s	sample

Shelf Stable Fruit and Vegetables - Shelf Stable Beans - Shelf Stable Fruit - Shelf Stable Tomatoes - Shelf Stable Vegetables Frozen Processed Fruit and Vegetables - Frozen Fruit - Frozen Processed Potatoes	Data removed from sample
- Frozen Processed Vegetables	

#### Table 39 Sales of Frozen Processed Vegetables by Type: % Value Breakdown 2016-2021

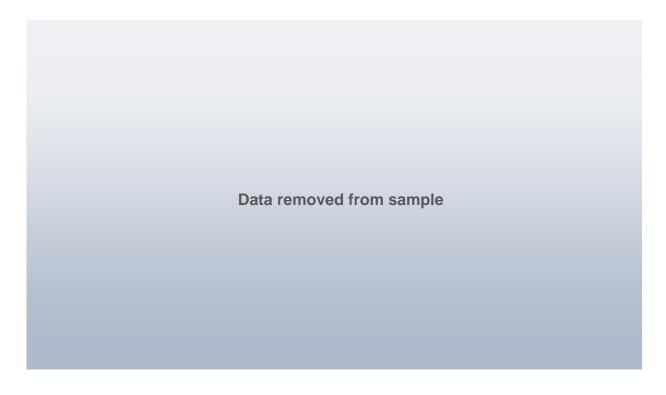
% retail value rsp	2016	2017	2018	2019	2020	2021
Artichoke Corn Green Beans Mixed Packs Molokhia Okra Onion Rings Peas Spinach Others Total			a remove	d from sa	mple	

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

#### Table 40 NBO Company Shares of Processed Fruit and Vegetables: % Value 2017-2021

% retail value rsp					
Company	2017	2018	2019	2020	2021

Data removed from sample



## Table 41 LBN Brand Shares of Processed Fruit and Vegetables: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
	Data remove	d from sample			



## Table 42 Distribution of Processed Fruit and Vegetables by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing - Grocery Retailers Modern Grocery Retailers Convenience Stores Discounters Forecourt Retailers Hypermarkets Supermarkets Traditional Grocery Retailers Food/drink/tobacco specialists Independent Small Grocers Other Grocery Retailers Non-Grocery Specialists		Dat	a remove	d from sa	mple	



Table 43Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2021-2026

'000 tonnes	2021	2022	2023	2024	2025	2026
Processed Fruit and Vegetables Shelf Stable Fruit and Vegetables - Shelf Stable Beans - Shelf Stable Fruit - Shelf Stable Tomatoes - Shelf Stable Vegetables Frozen Processed Fruit and Vegetables - Frozen Fruit - Frozen Fruit - Frozen Processed Potatoes - Frozen Processed		Dat	a remove	ed from sa	ample	
Vegetables						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

# Table 44Forecast Sales of Processed Fruit and Vegetables by Category: Value 2021-2026

AFD million

AED million	2021	2022	2023	2024	2025	2026
Processed Fruit and Vegetables Shelf Stable Fruit and Vegetables - Shelf Stable Beans - Shelf Stable Fruit - Shelf Stable Tomatoes - Shelf Stable Vegetables Frozen Processed Fruit and Vegetables - Frozen Fruit - Frozen Processed Potatoes		Dat	a remove	d from sa	mple	

- Frozen Processed Vegetables	Da	ata remov	ed from sample	•				
Source: Euromonitor International from tra trade sources								
Table 45 Forecast Sales of Pr Growth 2021-2026	ocessed Fruit and Veg	etables by Ca	tegory: % Volume					
% volume growth		2021/22	2021-26 CAGR	2021/26 Total				
Processed Fruit and Vegetables Shelf Stable Fruit and Vegetables - Shelf Stable Beans								
<ul> <li>Shelf Stable Fruit</li> <li>Shelf Stable Tomatoes</li> <li>Shelf Stable Vegetables</li> <li>Frozen Processed Fruit and Vegetable</li> <li>Frozen Fruit</li> </ul>	oles	Da	ta removed fro	m sample				
<ul> <li>Frozen Processed Potatoes</li> <li>Frozen Processed Vegetables</li> </ul>								
Source: Euromonitor International from tra trade sources	ade associations, trade pres	ss, company res	earch, trade interviews,					
Table 46 Forecast Sales of Pr Growth 2021-2026	ocessed Fruit and Veg	etables by Ca	tegory: % Value					
% constant value growth		2021/2022	2021-26 CAGR	2021/26 Total				
Processed Fruit and Vegetables Shelf Stable Fruit and Vegetables - Shelf Stable Beans								
- Shelf Stable Fruit		Dat	a removed fron	n sample				

- Shelf Stable Tomatoes
- Shelf Stable Vegetables Frozen Processed Fruit and Vegetables
- Frozen Fruit
- Frozen Processed Potatoes
- Frozen Processed Vegetables
- Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

# PROCESSED MEAT, SEAFOOD AND ALTERNATIVES TO MEAT IN THE UNITED ARAB EMIRATES -CATEGORY ANALYSIS

## **KEY DATA FINDINGS**

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## **2021 DEVELOPMENTS**

Retail sales face reverse dynamics in 2021

**Content removed from sample** 

Foodservice dynamics impact volume growth across the category

**Content removed from sample** 

## **PROSPECTS AND OPPORTUNITIES**

# Investment in cooking appliances fosters growth

**Content removed from sample** 

Regained mobility supports innovation within the category

**Content removed from sample** 

## **CATEGORY DATA**

Table 47Sales of Processed Meat, Seafood and Alternatives to Meat by Category:Volume 2016-2021

'000 tonnes	2016	2017	2018	2019	2020	2021
Processed Meat, Seafood and Alternatives to Meat Processed Meat - Shelf Stable Meat Shelf Stable Processed Red Meat Shelf Stable Processed Poultry - Chilled Processed Meat Chilled Processed Red Meat Chilled Processed Poultry - Frozen Processed Meat Frozen Processed Red Meat Frozen Processed Red Meat Frozen Processed		Dat	a remove	d from sa	mple	

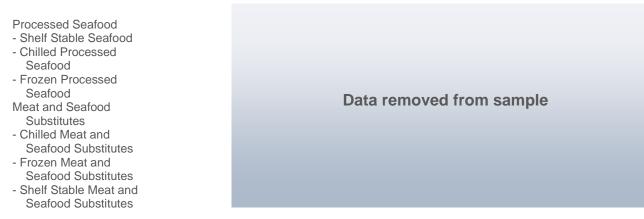


Table 48	Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value
2016-2021	

AED million	2016	2017	2018	2019	2020	2021
Processed Meat, Seafood and Alternatives to Meat Processed Meat - Shelf Stable Meat - Shelf Stable Meat - Shelf Stable Processed Red Meat - Shelf Stable Processed Poultry - Chilled Processed Meat - Chilled Processed Red Meat - Chilled Processed Meat - Frozen Processed Meat - Frozen Processed Meat - Frozen Processed Red Meat - Frozen Processed Red Meat - Shelf Stable Seafood - Shelf Stable Seafood - Chilled Processed Seafood - Frozen Processed Seafood - Frozen Processed Seafood Meat and Seafood Substitutes - Chilled Meat and Seafood Substitutes - Frozen Meat and Seafood Substitutes - Shelf Stable Meat and Seafood Substitutes - Shelf Stable Meat and Seafood Substitutes		Dat	a remove	d from sar	mple	

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

# Table 49Sales of Processed Meat, Seafood and Alternatives to Meat by Category: %Volume Growth 2016-2021

2020/21	2016-21 CAGR	2016/21 Total
Processed Meat, Seafood and Alternatives to Meat Processed Meat - Shelf Stable Meat - Shelf Stable Processed Red Meat - Shelf Stable Processed Poultry - Chilled Processed Meat - Chilled Processed Red Meat - Chilled Processed Poultry - Frozen Processed Meat - Frozen Processed Red Meat - Frozen Processed Seafood - Shelf Stable Seafood - Chilled Processed Seafood - Frozen Processed Seafood Meat and Seafood Substitutes - Chilled Meat and Seafood Substitutes - Shelf Stable Meat and Seafood Substitutes - Shelf Stable Meat and Seafood Substitutes - Shelf Stable Meat and Seafood Substitutes	Data removed from	sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

# Table 50Sales of Processed Meat, Seafood and Alternatives to Meat by Category: %Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Processed Meat, Seafood and Alternatives to Meat Processed Meat - Shelf Stable Meat - Shelf Stable Processed Red Meat - Shelf Stable Processed Poultry - Chilled Processed Meat - Chilled Processed Meat - Chilled Processed Red Meat - Chilled Processed Red Meat - Frozen Processed Meat - Frozen Processed Meat - Frozen Processed Poultry Processed Seafood - Shelf Stable Seafood - Chilled Processed Seafood - Chilled Processed Seafood - Frozen Processed Seafood - Chilled Meat and Seafood Substitutes - Frozen Meat and Seafood Substitutes - Frozen Meat and Seafood Substitutes - Shelf Stable Meat and Seafood Substitutes	D	ata removed fro	om sample

# Table 51 Sales of Shelf Stable Processed Red Meat by Type: % Volume Breakdown 2016-2021 Sales of Shelf Stable Processed Red Meat by Type: % Volume Breakdown

% retail	volume	2016	2017	2018	2019	2020	2021		
Beef Pork Other Ro Total	ed Meats		Data	removed	from sam	ple			
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources									
Table 52Sales of Chilled Processed Red Meat by Type: % Volume Breakdown 2016-2021									
% retail	volume	2016	2017	2018	2019	2020	2021		
Beef Pork Other Ro Total	ed Meats		Data	removed	from sam	nple			
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources									
Table 53Sales of Frozen Processed Red Meat by Type: % Volume Breakdown 2016-2021									
% retail	volume	2016	2017	2018	2019	2020	2021		

Beef Lamb Pork Other Red Meats Total	Data removed from sample							
Source: Euromonitor International from official statistics, trade associations, trade press, company research,								

store checks, trade interviews, trade sources

## Table 54 Sales of Frozen Processed Poultry by Type: % Value Breakdown 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Chicken Burgers Chicken Nuggets Chicken Sausages Coated Chicken Shish Kebab Others		Dat	a remove	d from sa	mple	

#### Data removed from sample Total Euromonitor International from official statistics, trade associations, trade press, company research, Source: store checks, trade interviews, trade sources Table 55 Sales of Frozen Processed Seafood by Type: % Value Breakdown 2016-2021 % retail value rsp 2016 2017 2018 2019 2020 2021 **Coated Fish Fillets Fish Burgers** Fish Fingers Data removed from sample Processed Shrimp/Prawns Shrimp Nuggets Others Total Euromonitor International from official statistics, trade associations, trade press, company research, Source: store checks, trade interviews, trade sources

# Table 56NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat:% Value 2017-2021

% retail value rsp					
Company	2017	2018	2019	2020	2021

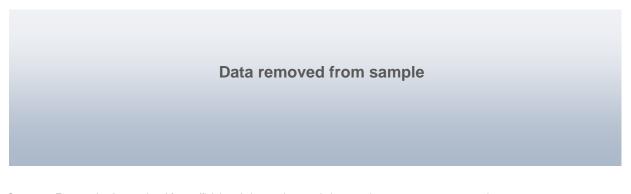
Data removed from sample

% retail value rsp



# Table 57LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: %Value 2018-2021

Brand (GBO)	Company (NBO)	2018	2019	2020	2021
	Data removed f	rom sample	•		



# Table 58Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: %Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing - Grocery Retailers Modern Grocery Retailers Convenience Stores Discounters Forecourt Retailers Hypermarkets Supermarkets Traditional Grocery Retailers Food/drink/tobacco specialists Independent Small Grocers Other Grocery Retailers - Non-Grocery Specialists Health and Beauty Specialist Retailers Other Foods Non- Grocery Specialists - Mixed Retailers Non-Store Retailing - Vending - Homeshopping - E-Commerce - Direct Selling Total				d from sar	nple	

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 59Forecast Sales of Processed Meat, Seafood and Alternatives to Meat byCategory: Volume 2021-2026

'000 tonnes	2021	2022	2023	2024	2025	2026
Processed Meat, Seafood and Alternatives to Meat Processed Meat - Shelf Stable Meat - Shelf Stable Meat - Shelf Stable Processed Red Meat - Shelf Stable Processed Poultry - Chilled Processed Meat - Chilled Processed Red Meat - Chilled Processed Poultry - Frozen Processed Meat - Frozen Processed Meat - Frozen Processed Red Meat - Frozen Processed Poultry Processed Seafood - Shelf Stable Seafood - Chilled Processed Seafood - Frozen Processed Seafood Meat and Seafood Substitutes - Chilled Meat and Seafood Substitutes - Frozen Meat and Seafood Substitutes - Shelf Stable Meat and Seafood Substitutes - Shelf Stable Meat and Seafood Substitutes		Data	ı removed	l from sar	nple	

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

# Table 60Forecast Sales of Processed Meat, Seafood and Alternatives to Meat byCategory: Value 2021-2026

AED million	2021	2022	2023	2024	2025	2026
Processed Meat, Seafood and Alternatives to Meat Processed Meat - Shelf Stable Meat Shelf Stable Processed Red Meat Shelf Stable Processed Poultry - Chilled Processed Meat Chilled Processed Red Meat Chilled Processed Poultry - Frozen Processed Meat Frozen Processed Red		Dat	ta remove	d from sa	mple	

<ul> <li> Frozen Processed Poultry</li> <li>Processed Seafood</li> <li>- Shelf Stable Seafood</li> <li>- Chilled Processed Seafood</li> <li>- Frozen Processed Seafood</li> <li>Meat and Seafood Substitutes</li> <li>- Chilled Meat and Seafood Substitutes</li> <li>- Frozen Meat and Seafood Substitutes</li> <li>- Frozen Meat and Seafood Substitutes</li> <li>- Shelf Stable Meat and</li> </ul>	Data removed from sample
Seafood Substitutes	

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

# RICE, PASTA AND NOODLES IN THE UNITED ARAB EMIRATES -CATEGORY ANALYSIS

## **KEY DATA FINDINGS**

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## **2021 DEVELOPMENTS**

Foodservice dynamics dictate the performance of the category in 2021

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Convenient options lose momentum in 2021

**Content removed from sample** 

Review of priorities dictates growth of channels

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**Content removed from sample** 

## **PROSPECTS AND OPPORTUNITIES**

Novelty maintains the attractiveness of premium products

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Further exploration of functionality likely to drive up value

**Content removed from sample** 

Convenience and diversity fuel further potential for e-commerce

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# **CATEGORY DATA**

Table 61	Sales of Rice, Pasta and Noodles by Category: Volume 2016-2021	
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'000 tonnes	2016	2017	2018	2019	2020	2021
Rice, Pasta and Noodles Noodles - Chilled Noodles - Frozen Noodles - Instant Noodles Instant Noodle Cups Instant Noodle Pouches - Plain Noodles Pasta - Chilled Pasta - Dried Pasta Rice		Data	a removed	l from sar	nple	

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

### Table 62 Sales of Rice, Pasta and Noodles by Category: Value 2016-2021

AED million	2016	2017	2018	2019	2020	2021
Rice, Pasta and Noodles Noodles - Chilled Noodles - Frozen Noodles - Instant Noodles Instant Noodle Cups Instant Noodle Pouches - Plain Noodles Pasta - Chilled Pasta - Dried Pasta Rice		Data	a removed	l from san	nple	

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

#### Table 63 Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2016-2021

% volume growth	2020/21	2016-21 CAGR	2016/21 Total
Rice, Pasta and Noodles Noodles - Chilled Noodles - Frozen Noodles - Instant Noodles Instant Noodle Cups Instant Noodle Pouches - Plain Noodles Pasta	Da	ata removed fro	om sample

Chilled Pasta
 Dried Pasta
 Rice
 Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
 Table 64 Sales of Rice, Pasta and Noodles by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Rice, Pasta and Noodles Noodles - Chilled Noodles - Frozen Noodles - Instant Noodles Instant Noodle Cups Instant Noodle Pouches - Plain Noodles Pasta - Chilled Pasta - Dried Pasta Rice	Da	ata removed fro	om sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

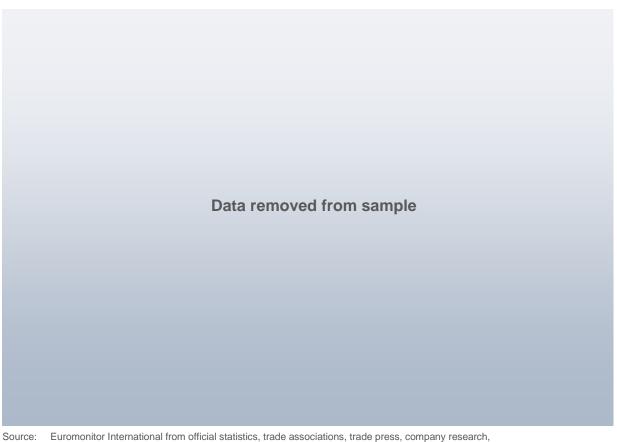
#### Table 65 Sales of Instant Noodles by Leading Flavours: Rankings 2016-2021

ranking	1	2016	2017	2018	2019	2020	2021
Vegeta	oodles Chicken ble n & Onion		Data	removed	from sam	ıple	
Source:	Euromonitor International from offic store checks, trade interviews, trade	,	de associations,	trade press, con	pany research,		

#### Table 66 NBO Company Shares of Rice, Pasta and Noodles: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
	Data removed	from sam	ble		





#### Table 67 LBN Brand Shares of Rice, Pasta and Noodles: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021				
	Data removed from sample								



### Table 68 NBO Company Shares of Rice: % Value 2017-2021

% retail Compar	value rsp ny		2017	2018	2019	2020	2021
		Data rem	oved from	n sample			
Source:	Euromonitor International fro	m official statistics, trac	de associations,	trade press, cor	npany research,		

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 69LBN Brand Shares of Rice: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
	Data removed from	m sample			

### Table 70 NBO Company Shares of Pasta: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
Data r	emoved fro	om samp	le		

## Table 71 LBN Brand Shares of Pasta: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
	Data removed	d from sample			
		·			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

### Table 72 NBO Company Shares of Noodles: % Value 2017-2021

2019	2020	2021

2021

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

# Table 73 LBN Brand Shares of Noodles: % Value 2018-2021 % retail value rsp Brand (GBO) Company (NBO) 2018 2019 2020 Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources



% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing - Grocery Retailers Modern Grocery Retailers Convenience Stores Discounters Forecourt Retailers Hypermarkets Supermarkets Supermarkets Traditional Grocery Retailers Food/drink/tobacco specialists Independent Small Grocers Other Grocery Retailers - Non-Grocery Specialists Health and Beauty Specialist Retailers Other Foods Non- Grocery Specialists - Mixed Retailers Non-Store Retailing		Data	removed	from san	nple	

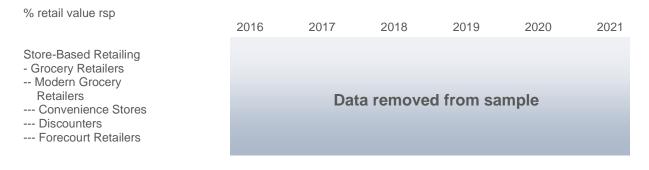
- Vending
- Homeshopping
- E-Commerce
- Direct Selling
- Total

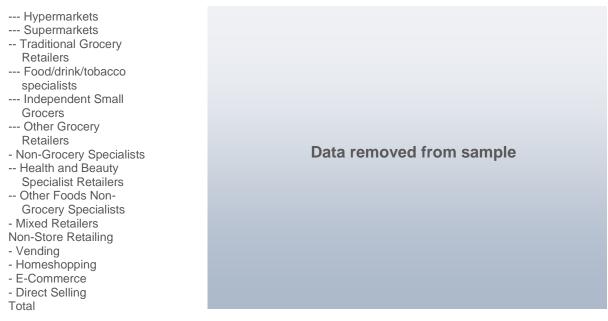
#### Table 75Distribution of Rice by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing - Grocery Retailers Modern Grocery Retailers Convenience Stores Discounters Forecourt Retailers Hypermarkets Hypermarkets Supermarkets Traditional Grocery Retailers Food/drink/tobacco specialists Independent Small Grocers Other Grocery Retailers - Non-Grocery Specialists Health and Beauty Specialist Retailers Other Foods Non- Grocery Specialists - Mixed Retailers Non-Store Retailing - Vending - Homeshopping - E-Commerce - Direct Selling Total		Data	removed	from san	nple	

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

#### Table 76Distribution of Pasta by Format: % Value 2016-2021





## Table 77 Distribution of Noodles by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing - Grocery Retailers Modern Grocery Retailers Convenience Stores Discounters Forecourt Retailers Hypermarkets Supermarkets Traditional Grocery Retailers Food/drink/tobacco specialists Independent Small Grocers Other Grocery Retailers Other Grocery Retailers Non-Grocery Specialists Health and Beauty Specialist Retailers Other Foods Non- Grocery Specialists Mixed Retailers Non-Store Retailing - Vending - Homeshopping - E-Commerce - Direct Selling Total		Data	a removed	I from sar	nple	

### Table 78 Forecast Sales of Rice, Pasta and Noodles by Category: Volume 2021-2026

'000 tonnes	2021	2022	2023	2024	2025	2026
Rice, Pasta and Noodles Noodles - Chilled Noodles - Frozen Noodles - Instant Noodles Instant Noodle Cups Instant Noodle Pouches - Plain Noodles Pasta - Chilled Pasta - Dried Pasta Rice		Data	removed	from san	nple	

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

#### Table 79 Forecast Sales of Rice, Pasta and Noodles by Category: Value 2021-2026

AED million	2021	2022	2023	2024	2025	2026
Rice, Pasta and Noodles Noodles - Chilled Noodles - Frozen Noodles - Instant Noodles Instant Noodle Cups Instant Noodle Pouches - Plain Noodles Pasta - Chilled Pasta - Dried Pasta Rice		Data	a removed	l from sar	nple	
Courses — Europensites International from trade accessional trade processional responses to the delinter views						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

# Table 80Forecast Sales of Rice, Pasta and Noodles by Category: % Volume Growth2021-2026

% volume growth	2021/22	2021-26 CAGR	2021/26 Total
Rice, Pasta and Noodles Noodles - Chilled Noodles - Frozen Noodles - Instant Noodles Instant Noodle Cups Instant Noodle Pouches	D	ata removed fron	n sample

- Plain Noodles Pasta - Chilled Pasta - Dried Pasta Rice	Data	a removed from	n sample		
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources					
Table 81Forecast Sales of Rice, Pasta and Noodles b2026	y Category:	% Value Growth 202 <sup>4</sup>	-		
% constant value growth 20	021/2022	2021-26 CAGR	2021/26 Tota		
Rice, Pasta and Noodles Noodles - Chilled Noodles - Frozen Noodles - Instant Noodles Instant Noodle Cups Instant Noodle Pouches - Plain Noodles Pasta - Chilled Pasta - Dried Pasta	Data	removed from	sample		

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Rice