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Middle East And North Africa (MENA) Out Of Home Dining (OOHD) Market: Analysis By Segment (Full-service Restaurants (FSR) & Casual Dining, Quick Service Restaurants (QSR), Coffee Shops, Indulgence Outlets And Others), By Region Size And Trends With Impact Of COVID-19 And Forecast Up To 2028

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Abstracts

The Middle East And North Africa (MENA) out of home dining (OOHD) market in 2022 was valued at US$44.80 billion. The market value is projected to reach US$81.82 billion by 2028. Out-of-home dining sector (OOHD) focuses on providing food services. It is one of the key components of the hospitality industry. Meals are generally served and eaten on the premises, but many Out Of Home Dining outlets/ restaurants also offer take-out and food delivery services.

The market value is expected to grow at a CAGR of 10.66% during the forecast period of 2023-2028, with full-service restaurants (FSR) and casual dining segment being the dominant segment owing to rising consumer's disposable income. The rising demand for healthy food coupled with creative presentation is becoming a key trend in the global foodservice industry. Nowadays, consumers are more influenced by the food quality and service experience of a restaurant. Emergence of new communities and projects, favorable consumer demographics, changing consumer preferences, growing tourism sector and rising consumer demand for convenience and quality meals at affordable prices are the significant factors further expected to drive the MENA out of home dining market.

Market Segmentation Analysis:

By Segment: The report provides the bifurcation of the market into five categories based on the segment: full-service restaurants (FSR) and casual dining, quick service restaurants (QSR), indulgence outlets, coffee shops and others. In 2022, in terms of value, full-service restaurants (FSR) and casual dining segment held the major share in the market. Full-service restaurants can offer better customer service and healthy food according to the demand of the customers. High end restaurants for formal and casual dining are becoming the main choice of consumers in the recent years. In addition, lower cost and casual dining full service restaurants have been gaining increasing momentum, especially in developing economies, amid the spike in working population and rapid penetration of dine-out culture.

By Region: The report provides the bifurcation of the market into into four core regions: Kingdom of Saudi Arabia (KSA), Egypt, United Arab Emirates (UAE) and Kuwait. In 2022, Kingdom of Saudi Arabia (KSA) held the major share in the market, followed by UAE. The high levels of disposable income which prevail among the Saudi population, coupled with the harsh climatic conditions in the country and the relatively limited range of other pastimes and leisure activities, make eating out and shopping the entertainment of choice for a large segment of the Saudi population propelling the overall OOHD market.

The report also provides the detailed analysis of the Kingdom of Saudi Arabia (KSA), United Arab Emirates (UAE), Egypt and Kuwait Out Of Home Dining market by segments (full-service restaurants (FSR) and casual dining, quick service restaurants (QSR) and other OOHD). The makeup of the OOHD sector varies among markets. Owing to increased disposable income and growing tourism sector, FSR and casual dining are the largest segments in KSA and the UAE, followed by QSR. In contrast, QSR dominates in Kuwait and Egypt with FSR and casual dining coming in second as the Kuwait and Egypt has inclining young and urban poplation, thus exhibiting higher fast-food consumption among them.

Market Dynamics:

Growth Drivers: One of the most important factors impacting the MENA out of home dining market is the rising disposable income. High disposable income causes consumers to spend more on a variety of activities, including hotels and restaurants. GCC countries benefit from large government-led economic transformation and diversification projects, high purchasing power, extensive new infrastructure developments, and a high overall level of economic resilience, which is supported by stable currencies pegged to the US dollar. In addition to this, the market has been

growing over the past few years, due to factors such as rapid urbanization, young demographics, flourishing tourism sector and many other factors.

Challenges: However, the market has been confronted with some challenges specifically, regulatory intervention & change in consumer tastes and preferences, etc.

Trends: The market is projected to grow at a fast pace during the forecast period, due to various latest trends such as modernization of retail sector and increasing outdoor/entertainment, adoption of western-style meals, digitization of out of home dining, underpenetrated market, social media influencers, increasing share of chained (organized) QSR restaurants and increasing penetration of smartphones etc. Rising consumer purchasing power is a primary factor in increasing penetration of organised players in the Middle East and North African OOHD market. Besides, these organized chains offer affordable prices for their products and match the local consumer's tastes and preferences, thus making them a preferable choice. Furthermore, post COVID-19, the QSR segment has increasingly been a prominent choice among consumers as they provide convenient home delivery options. The share of chained (organized) QSR restaurants is thus expected to propel during forecasted years.

Impact Analysis of COVID-19 and Way Forward:

The sudden outbreak of the COVID-19 pandemic has caused a significant strain on the growth of the Middle East and North Africa out of home dining market. Strict measures to contain the spread of the virus during the pandemic adversely impacted tourism, consumer mobility, and purchasing behaviors. The subsequent economic shock, which was accompanied by store closures and global supply-chain disruptions, temporarily halted the rise in the OOHD consumer demand. Within OOHD, the pandemic had a more detrimental impact on FSR than on QSR. FSR struggled to adapt to the needs of the home delivery and drive through channels. In 2020, FSR experienced a sharper fall in sales than QSR.

Competitive Landscape:

The market for OOHD is severely fragmented. The largest players control only a small portion of the market, and there are many small participants.

The key players in the MENA out of home dining market are:

Americana Restaurants Ltd.

Alshaya Group

Herfy Food Services Co Ltd

Emirates Fast Food Co.

Al Maousherji Catering Company

Alamar Foods Company

AlBaik

Al Farooj Fresh

Al Tazaj

Cenomi Retail (Alhoikar)

Seazen Group

Caesars Group Of Companies

The MENA restaurant industry has low entry barriers, as evidenced by the modest capital requirements and straightforward operations. Consequently, small, or sole proprietorship operations dominate the industry. Food preferences are typically determined by local consumer demand, thereby adding to the fragmentation of a largely local business. The diverse nature of the GCC population generates high demand for ethnic food specialties and international cuisine, further contributing to a localized, segmented market. ?

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