

Middle East & Africa Gluten-free Products Market Size and Forecast (2021 - 2031)

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Abstracts

The Gluten-free Products Market in the Middle East & Africa is projected to grow significantly, reaching approximately US\$ 863.0 million by 2031, up from US\$ 474.1 million in 2024, with an estimated compound annual growth rate (CAGR) of 9.0% from 2025 to 2031.

Executive Summary and Market Analysis

The gluten-free products sector in the Middle East & Africa has experienced consistent growth, primarily driven by increasing awareness of gluten-related disorders such as celiac disease and gluten intolerance, alongside a general rise in health consciousness among consumers. Regulatory bodies, including the Gulf Cooperation Council (GCC) Standardization Organization and the African Union's health initiatives, are enhancing food labeling transparency and gluten-free product certification, which encourages manufacturers to innovate and broaden their gluten-free offerings to satisfy the growing consumer demand.

Factors such as urbanization, economic growth, and a shift towards western dietary habits have led to a heightened demand for convenient and specialty foods, including gluten-free options. The expansion of retail infrastructure, particularly through supermarket chains and modern grocery stores, has improved the distribution and availability of gluten-free products in urban areas. Additionally, government initiatives aimed at enhancing food safety standards and nutritional awareness campaigns have educated consumers about gluten-related health issues, creating a conducive environment for market growth. Projections indicate that this trend will continue, fueled by increasing demand and ongoing investments in product innovation and distribution.

Strategic Insights

Market Segmentation

The Middle East & Africa Gluten-free Products Market is categorized by product type into:

Bakery Products (largest segment in 2024)

Confectionery Bars

Pasta and Noodles

Breakfast Cereals

Snacks

Ready-to-Eat (RTE) and Ready-to-Cook (RTC) Meals

Flour

Others

The Bakery Products segment is further divided into:

Cakes and Muffins

Biscuits and Cookies

Pizza

Bread and Rolls

Other Bakery Products

By distribution channel, the market is segmented into:

Supermarkets and Hypermarkets (largest segment in 2024)

Convenience Stores

Online Retail

Others

Market Outlook

As health-conscious consumers increasingly seek products that offer more than just gluten-free benefits, there is a growing demand for clean-label products associated with better health outcomes. While gluten-free products are crucial for those with celiac disease and gluten intolerance, there is a perception that they may lack essential nutrients like fiber, vitamins, and minerals. To address this, key players are developing fortified gluten-free products. The demand for functional foods that provide health benefits is positively impacting the gluten-free market. Consumers are now looking for products that support specific health goals, such as improved digestion and enhanced energy levels. Many gluten-free products are being fortified with probiotics, omega-3 fatty acids, and antioxidants to meet these needs.

The influence of global health trends and the availability of international brands have further accelerated the adoption of clean-label products. Major retailers, including Carrefour, Lulu Hypermarket, Walmart, and Tesco, offer a variety of international gluten-free brands, providing consumers with options that adhere to global clean label standards. The clean label food trend is driven by rising health awareness, demographic changes, and the impact of international brands, leading to the development of gluten-free, clean-labeled, and fortified products that are perceived as premium and healthy.

In October 2024, Modern Mills Company launched a line of Saudi-branded fortified gluten-free flours, marking a significant clean-label innovation in the Middle East. This product line includes multipurpose, pizza, pastry, and dessert flours, all adhering to international gluten-free standards and enriched with essential nutrients. This launch reflects the regional demand for clean-label, health-oriented foods, catering to both celiac and wellness-focused consumers. The gluten-free market is evolving to meet the increasing consumer demand for clean-label, fortified, and functional products that promote overall health and wellness. Brands are focusing on transparency, nutrient enhancement, and natural ingredients to attract health-conscious individuals, driving

innovation and positioning gluten-free options as nutritious choices beyond mere gluten avoidance.

Country Insights

The market is segmented by country into South Africa, Saudi Arabia, the United Arab Emirates, and the Rest of Middle East & Africa, with the Rest of Middle East & Africa holding the largest share in 2024. Countries like Turkey, Kuwait, Bahrain, Oman, and Kenya are significant contributors to the gluten-free products market in this region, driven by rising health awareness and increasing diagnoses of gluten-related disorders. Urbanization and exposure to global dietary trends are boosting the demand for gluten-free alternatives, especially in bakery, snacks, and convenience foods. Turkey has a well-established market, while Gulf nations like Kuwait and Bahrain are experiencing growth due to high disposable incomes and premium health food trends. In Africa, countries like Kenya are gradually adopting gluten-free options, influenced by expatriate communities and expanding retail distribution.

Company Profiles

Key players in the market include Nestlé SA, Mondelez International Inc., Blue Diamond Growers, General Mills Inc., American Garden, Hunter Foods LLC, Mister Free'd, YummyEarth Inc., Galletas Gullon SA, and Dr. Schär Spa. These companies are employing various strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative products to consumers.

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