

Dairy Products and Alternatives in Egypt

September 2023

Table of Contents

Dairy Products and Alternatives in Egypt

EXECUTIVE SUMMARY

Dairy products and alternatives in 2023: The big picture

Key trends in 2023

Competitive Landscape

Channel developments

What next for dairy products and alternatives?

MARKET DATA

Table 1 - Sales of Dairy Products and Alternatives by Category: Value 2018-2023

Table 2 - Sales of Dairy Products and Alternatives by Category: % Value Growth 2018-2023

Table 3 - NBO Company Shares of Dairy Products and Alternatives: % Value 2019-2023

Table 4 - LBN Brand Shares of Dairy Products and Alternatives: % Value 2020-2023

Table 5 - Distribution of Dairy Products and Alternatives by Format: % Value 2018-2023

Table 6 - Forecast Sales of Dairy Products and Alternatives by Category: Value 2023-2028

Table 7 - Forecast Sales of Dairy Products and Alternatives by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baby Food in Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Inflation impacts baby food, while currency devaluation increases price points

Demand for standard and special baby formula remains due to a lack of alternatives

The government ensures the wide availability of baby food products on the landscape

PROSPECTS AND OPPORTUNITIES

Nestlé Egypt is set to focus on its range of prepared baby food

The use of subsidised baby formula will negatively impact private label

Baby food landscape to remain resilient, despite ongoing challenges

CATEGORY DATA

Table 8 - Sales of Baby Food by Category: Volume 2018-2023

Table 9 - Sales of Baby Food by Category: Value 2018-2023

Table 10 - Sales of Baby Food by Category: % Volume Growth 2018-2023

Table 11 - Sales of Baby Food by Category: % Value Growth 2018-2023

Table 12 - Sales of Growing-Up Milk Formula by Age: % Value 2018-2023

Table 13 - NBO Company Shares of Baby Food: % Value 2019-2023

Table 14 - LBN Brand Shares of Baby Food: % Value 2020-2023

Table 15 - Distribution of Baby Food by Format: % Value 2018-2023

Table 16 - Forecast Sales of Baby Food by Category: Volume 2023-2028

Table 17 - Forecast Sales of Baby Food by Category: Value 2023-2028

Table 18 - Forecast Sales of Baby Food by Category: % Volume Growth 2023-2028

Table 19 - Forecast Sales of Baby Food by Category: % Value Growth 2023-2028

Butter and Spreads in Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Devaluation of the currency negatively impacts the price of butter and spreads
Consumers favour promotional deals, while sales in discounters rise
Afia International Co retains its lead while players cut supplies to force price increases

PROSPECTS AND OPPORTUNITIES

Butter and spreads have a positive future with help from the government
Savola Group continues enhancing its portfolio in Egypt
Small local producers gain traction across the coming years

CATEGORY DATA

Table 20 - Sales of Butter and Spreads by Category: Volume 2018-2023
Table 21 - Sales of Butter and Spreads by Category: Value 2018-2023
Table 22 - Sales of Butter and Spreads by Category: % Volume Growth 2018-2023
Table 23 - Sales of Butter and Spreads by Category: % Value Growth 2018-2023
Table 24 - NBO Company Shares of Butter and Spreads: % Value 2019-2023
Table 25 - LBN Brand Shares of Butter and Spreads: % Value 2020-2023
Table 26 - Distribution of Butter and Spreads by Format: % Value 2018-2023
Table 27 - Forecast Sales of Butter and Spreads by Category: Volume 2023-2028
Table 28 - Forecast Sales of Butter and Spreads by Category: Value 2023-2028
Table 29 - Forecast Sales of Butter and Spreads by Category: % Volume Growth 2023-2028
Table 30 - Forecast Sales of Butter and Spreads by Category: % Value Growth 2023-2028

Cheese in Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Increase in current retail value sales as price points rise due to inflation
Rise in local cheese production as international goods disappear from shelves
Best Cheese Co for Dairy Products maintains its lead in cheese

PROSPECTS AND OPPORTUNITIES

Companies implement solutions for increasing profit margins
Functional claims set to drive innovation over the forecast period
Trading down will continue to be a solution for many consumers

CATEGORY DATA

Table 31 - Sales of Cheese by Category: Volume 2018-2023
Table 32 - Sales of Cheese by Category: Value 2018-2023
Table 33 - Sales of Cheese by Category: % Volume Growth 2018-2023
Table 34 - Sales of Cheese by Category: % Value Growth 2018-2023
Table 35 - Sales of Spreadable Processed Cheese by Type: % Value 2018-2023
Table 36 - Sales of Soft Cheese by Type: % Value 2018-2023
Table 37 - Sales of Hard Cheese by Type: % Value 2018-2023
Table 38 - NBO Company Shares of Cheese: % Value 2019-2023
Table 39 - LBN Brand Shares of Cheese: % Value 2020-2023
Table 40 - Distribution of Cheese by Format: % Value 2018-2023
Table 41 - Forecast Sales of Cheese by Category: Volume 2023-2028
Table 42 - Forecast Sales of Cheese by Category: Value 2023-2028
Table 43 - Forecast Sales of Cheese by Category: % Volume Growth 2023-2028
Table 44 - Forecast Sales of Cheese by Category: % Value Growth 2023-2028

Drinking Milk Products in Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Despite increasing price points, current retail volume demand is stable
Consumers replace fruit juice with flavoured milk, benefiting sales
Recycling measures are put in place for Tetra Pak

PROSPECTS AND OPPORTUNITIES

The future of drinking milk is positive as it remains an essential commodity
Juhayna food industries focus on solar panels to be energy self-sufficient
Opportunities for value-added and plant-based options

CATEGORY DATA

Table 45 - Sales of Drinking Milk Products by Category: Volume 2018-2023

Table 46 - Sales of Drinking Milk Products by Category: Value 2018-2023

Table 47 - Sales of Drinking Milk Products by Category: % Volume Growth 2018-2023

Table 48 - Sales of Drinking Milk Products by Category: % Value Growth 2018-2023

Table 49 - NBO Company Shares of Drinking Milk Products: % Value 2019-2023

Table 50 - LBN Brand Shares of Drinking Milk Products: % Value 2020-2023

Table 51 - Distribution of Drinking Milk Products by Format: % Value 2018-2023

Table 52 - Forecast Sales of Drinking Milk Products Products by Category: Volume 2023-2028

Table 53 - Forecast Sales of Drinking Milk Products Products by Category: Value 2023-2028

Table 54 - Forecast Sales of Drinking Milk Products Products by Category: % Volume Growth 2023-2028

Table 55 - Forecast Sales of Drinking Milk Products Products by Category: % Value Growth 2023-2028

Yoghurt and Sour Milk Products in Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Yoghurt and sour milk post growth, as consumers appreciate health benefits
Consumers opt for home-made yoghurt in the face of rising prices
The Best Cheese Co for Dairy Products retains its lead while players focus on flavour

PROSPECTS AND OPPORTUNITIES

Healthy constant value growth, boosted by sour milk products
Increasing health awareness drives new product development
Promotions will remain key to maintaining share across the coming years

CATEGORY DATA

Table 56 - Sales of Yoghurt and Sour Milk Products by Category: Volume 2018-2023

Table 57 - Sales of Yoghurt and Sour Milk Products by Category: Value 2018-2023

Table 58 - Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2018-2023

Table 59 - Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2018-2023

Table 60 - NBO Company Shares of Yoghurt and Sour Milk Products: % Value 2019-2023

Table 61 - LBN Brand Shares of Yoghurt and Sour Milk Products: % Value 2020-2023

Table 62 - Distribution of Yoghurt and Sour Milk Products by Format: % Value 2018-2023

Table 63 - Forecast Sales of Yoghurt and Sour Milk Products by Category: Volume 2023-2028

Table 64 - Forecast Sales of Yoghurt and Sour Milk Products by Category: Value 2023-2028

Table 65 - Forecast Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2023-2028

Table 66 - Forecast Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2023-2028

Other Dairy in Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Other Dairy suffers in 2023 as price-sensitivity rises and consumers hunt for deals

Many consumers prefer smaller pack sizes, increasing sales

Danone Egypt leads the landscape in 2023

PROSPECTS AND OPPORTUNITIES

Changing presence of imported products across the forecast period

Condensed and evaporated milk remains niche

Opportunities lie in added-value proposals to revitalise Other Dairy

CATEGORY DATA

Table 67 - Sales of Other Dairy by Category: Volume 2018-2023

Table 68 - Sales of Other Dairy by Category: Value 2018-2023

Table 69 - Sales of Other Dairy by Category: % Volume Growth 2018-2023

Table 70 - Sales of Other Dairy by Category: % Value Growth 2018-2023

Table 71 - Sales of Cream by Type: % Value 2018-2023

Table 72 - NBO Company Shares of Other Dairy: % Value 2019-2023

Table 73 - LBN Brand Shares of Other Dairy: % Value 2020-2023

Table 74 - Distribution of Other Dairy by Format: % Value 2018-2023

Table 75 - Forecast Sales of Other Dairy by Category: Volume 2023-2028

Table 76 - Forecast Sales of Other Dairy by Category: Value 2023-2028

Table 77 - Forecast Sales of Other Dairy by Category: % Volume Growth 2023-2028

Table 78 - Forecast Sales of Other Dairy by Category: % Value Growth 2023-2028

Plant-Based Dairy in Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Inflation negatively impacts current retail volume sales of plant-based dairy

Consumers reduce their consumption while looking for deals and discounts

Fluctuation in imported products as local players fill the gap

PROSPECTS AND OPPORTUNITIES

Growing awareness and rising interest in health benefits sales

Private label set to grow its presence over the forecast period

Juhayna Food Industries is set to continue enhancing its portfolio

CATEGORY DATA

Table 79 - Sales of Plant-Based Dairy by Category: Value 2018-2023

Table 80 - Sales of Plant-Based Dairy by Category: % Value Growth 2018-2023

Table 81 - NBO Company Shares of Plant-Based Dairy: % Value 2019-2023

Table 82 - LBN Brand Shares of Plant-Based Dairy: % Value 2020-2023

Table 83 - Distribution of Plant-Based Dairy by Format: % Value 2018-2023

Table 84 - Forecast Sales of Plant-Based Dairy by Category: Value 2023-2028

Table 85 - Forecast Sales of Plant-Based Dairy 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/dairy-products-and-alternatives-in-egypt/report.