

Dairy Products and Alternatives in the United Arab Emirates

September 2023

Table of Contents

Dairy Products and Alternatives in the United Arab Emirates

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 - Penetration of Private Label by Category: % Value 2018-2023

Table 6 - Distribution of Dairy Products and Alternatives by Format: % Value 2018-2023

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

Table 8 - Forecast Sales of Dairy Products and Alternatives by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baby Food in the United Arab Emirates

KEY DATA FINDINGS

2023 DEVELOPMENTS

Inflation boosts retail value growth of milk formula, but volumes decline

Mothers are focusing more on home-prepared rather than packaged baby food

Sales via e-commerce are rising, negatively impacting store-based retail channels

PROSPECTS AND OPPORTUNITIES

Lower birth rate amongst young adults, despite population influx

Mothers prefer organically sourced or gluten free baby food

CATEGORY DATA

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

Table 10 - Sales of Baby Food by Category: Value 2018-2023

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

Table 12 - Sales of Baby Food by Category: % Value Growth 2018-2023

Table 13 - Sales of Growing-Up Milk Formula by Age: % Value 2018-2023

Table 14 - NBO Company Shares of Baby Food: % Value 2019-2023

Table 15 - LBN Brand Shares of Baby Food: % Value 2020-2023

Table 16 - Distribution of Baby Food by Format: % Value 2018-2023

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

Table 18 - Forecast Sales of Baby Food by Category: Value 2023-2028

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

Table 20 - Forecast Sales of Baby Food by Category: % Value Growth 2023-2028

Butter and Spreads in the United Arab Emirates

KEY DATA FINDINGS

2023 DEVELOPMENTS

Positive value performance for butter due to inflationary pressures

Retail volume growth limited by reduction in home baking, but foodservice sales rise strongly due to increased socialising

Conscious consumption and substitution evident amongst the population

PROSPECTS AND OPPORTUNITIES

Positive retail and foodservice volume growth expected in the forecast period

Rise in promotions and growth for private label will drive reformulation by brands

CATEGORY DATA

Table 21 - Sales of Butter and Spreads by Category: Volume 2018-2023

Table 22 - Sales of Butter and Spreads by Category: Value 2018-2023

Table 23 - Sales of Butter and Spreads by Category: % Volume Growth 2018-2023

Table 24 - Sales of Butter and Spreads by Category: % Value Growth 2018-2023

Table 25 - NBO Company Shares of Butter and Spreads: % Value 2019-2023

Table 26 - LBN Brand Shares of Butter and Spreads: % Value 2020-2023

Table 27 - Distribution of Butter and Spreads by Format: % Value 2018-2023

Table 28 - Forecast Sales of Butter and Spreads by Category: Volume 2023-2028

Table 29 - Forecast Sales of Butter and Spreads by Category: Value 2023-2028

Table 30 - Forecast Sales of Butter and Spreads by Category: % Volume Growth 2023-2028

Table 31 - Forecast Sales of Butter and Spreads by Category: % Value Growth 2023-2028

Cheese in the United Arab Emirates

KEY DATA FINDINGS

2023 DEVELOPMENTS

Cheese declines in retail volume terms, but value growth remains positive

Resumption of social activities drives foodservice volume growth of cheese

Healthier developments aid sales of processed cheese

PROSPECTS AND OPPORTUNITIES

New innovations, coupled with promotions, set to drive growth

Rise in tourism and influx of Eastern Europeans set to drive growth in foodservice

Conscious effort by adults to reduce dairy consumption or choose healthier products

CATEGORY DATA

Table 32 - Sales of Cheese by Category: Volume 2018-2023

Table 33 - Sales of Cheese by Category: Value 2018-2023

Table 34 - Sales of Cheese by Category: % Volume Growth 2018-2023

Table 35 - Sales of Cheese by Category: % Value Growth 2018-2023

Table 36 - Sales of Spreadable Processed Cheese by Type: % Value 2018-2023

Table 37 - Sales of Soft Cheese by Type: % Value 2018-2023

Table 38 - Sales of Hard Cheese by Type: % Value 2018-2023

Table 39 - NBO Company Shares of Cheese: % Value 2019-2023

Table 40 - LBN Brand Shares of Cheese: % Value 2020-2023

Table 41 - Distribution of Cheese by Format: % Value 2018-2023

Table 42 - Forecast Sales of Cheese by Category: Volume 2023-2028

Table 43 - Forecast Sales of Cheese by Category: Value 2023-2028

Table 44 - Forecast Sales of Cheese by Category: % Volume Growth 2023-2028

Table 45 - Forecast Sales of Cheese by Category: % Value Growth 2023-2028

Drinking Milk Products in the United Arab Emirates

KEY DATA FINDINGS

2023 DEVELOPMENTS

Retail price increases strongly boost value sales, but limit volume growth

Private label is on the rise in terms of share of shelf and sales

Q-commerce for chilled dairy products is growing

PROSPECTS AND OPPORTUNITIES

Consolidation expected amongst local players

Consumer interest in protein milk is growing

Further growth in private label anticipated

CATEGORY DATA

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

Table 47 - Sales of Drinking Milk Products by Category: Value 2018-2023

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

Table 49 - Sales of Drinking Milk Products by Category: % Value Growth 2018-2023

Table 50 - NBO Company Shares of Drinking Milk Products: % Value 2019-2023

Table 51 - LBN Brand Shares of Drinking Milk Products: % Value 2020-2023

Table 52 - Distribution of Drinking Milk Products by Format: % Value 2018-2023

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

Table 54 - Forecast Sales of Drinking Milk Products Products by Category: Value 2023-2028

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

Table 56 - Forecast Sales of Drinking Milk Products Products by Category: % Value Growth 2023-2028

Yoghurt and Sour Milk Products in the United Arab Emirates

KEY DATA FINDINGS

2023 DEVELOPMENTS

Growing interest in and demand for protein-rich drinking yoghurt

Private label presence increases in yoghurt and sour milk products

PROSPECTS AND OPPORTUNITIES

Number of varieties of Greek yoghurt expected to rise

Further innovations in terms of health and flavours anticipated

CATEGORY DATA

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

Table 58 - Sales of Yoghurt and Sour Milk Products by Category: Value 2018-2023

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

Table 60 - Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2018-2023

Table 61 - Sales of Flavoured Yoghurt by Flavour: Rankings 2018-2023

Table 62 - NBO Company Shares of Yoghurt and Sour Milk Products: % Value 2019-2023

Table 63 - LBN Brand Shares of Yoghurt and Sour Milk Products: % Value 2020-2023

Table 64 - Distribution of Yoghurt and Sour Milk Products by Format: % Value 2018-2023

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

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

Table 67 - Forecast Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2023-2028

Table 68 - Forecast Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2023-2028

Other Dairy in the United Arab Emirates

KEY DATA FINDINGS

2023 DEVELOPMENTS

Condensed and evaporated milk witnesses better growth in foodservice than retail
Positive performance for chilled dairy desserts and fromage frais and quark

PROSPECTS AND OPPORTUNITIES

Busier lives will encourage more take-out, driving strong foodservice volume growth
Other dairy suffers from a lack of innovation, which will prevent stronger growth

CATEGORY DATA

Table 69 - Sales of Other Dairy by Category: Volume 2018-2023
Table 70 - Sales of Other Dairy by Category: Value 2018-2023
Table 71 - Sales of Other Dairy by Category: % Volume Growth 2018-2023
Table 72 - Sales of Other Dairy by Category: % Value Growth 2018-2023
Table 73 - Sales of Cream by Type: % Value 2018-2023
Table 74 - NBO Company Shares of Other Dairy: % Value 2019-2023
Table 75 - LBN Brand Shares of Other Dairy: % Value 2020-2023
Table 76 - Distribution of Other Dairy by Format: % Value 2018-2023
Table 77 - Forecast Sales of Other Dairy by Category: Volume 2023-2028
Table 78 - Forecast Sales of Other Dairy by Category: Value 2023-2028
Table 79 - Forecast Sales of Other Dairy by Category: % Volume Growth 2023-2028
Table 80 - Forecast Sales of Other Dairy by Category: % Value Growth 2023-2028

Plant-Based Dairy in the United Arab Emirates

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rising adoption of plant-based milk in both retail and foodservice, from a low base
More gen Z and millennials are actively seeking plant-based milk

PROSPECTS AND OPPORTUNITIES

Plant-based alternatives remain an expensive option

CATEGORY DATA

Table 81 - Sales of Plant-Based Dairy by Category: Value 2018-2023
Table 82 - Sales of Plant-Based Dairy by Category: % Value Growth 2018-2023
Table 83 - Sales of Other Plant-Based Milk by Type: % Value 2020-2023
Table 84 - NBO Company Shares of Plant-Based Dairy: % Value 2019-2023
Table 85 - LBN Brand Shares of Plant-Based Dairy: % Value 2020-2023
Table 86 - Distribution of Plant-Based Dairy by Format: % Value 2018-2023
Table 87 - Forecast Sales of Plant-Based Dairy by Category: Value 2023-2028
Table 88 - 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-the-united-arab-emirates/report.