



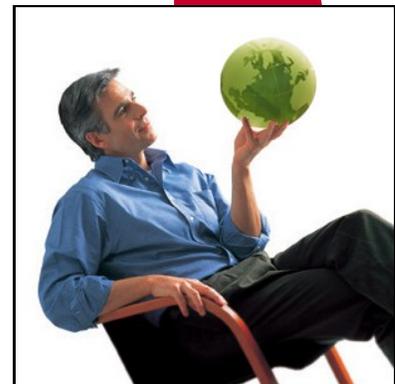
Agriculture and  
Agri-Food Canada

Agriculture et  
Agroalimentaire Canada

**International  
Markets  
Bureau**

**MARKET ANALYSIS REPORT | JUNE 2011**

# **Saudi Arabia, Egypt and the United Arab Emirates** Consumers, Markets, and Demand for Grain-based Products





▶ **EXECUTIVE SUMMARY**

*This report is based on a specialized presentation prepared for industry clients, looking for information on the grain market in Saudi Arabia, Egypt and the United Arab Emirates (U.A.E.).*

The retail processed food sector is a growing market. In 2010, processed foods dominated the new food and beverage product releases in Saudi Arabia, Egypt and the U.A.E. Each country also saw significant growth in the grain-based product sector, specifically for pasta/noodles, bakery, and processed snack foods.

Family lifestyle changes in these countries have been a main contributing factor to the rise in consumption of processed foods. With an increasing number of women joining the workforce, time-consuming meals, in which women would spend hours cooking, are no longer a practical option. Instead, consumers are opting to prepare quick and easy meals using processed foods.

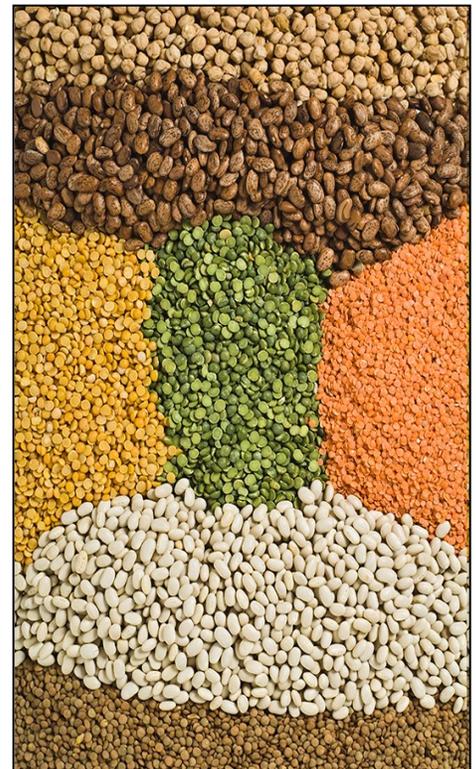
The consumption of processed food does not come without its costs. Obesity rates in Saudi Arabia, Egypt and the U.A.E. are rising due to this adoption of Western-style eating habits. For example, approximately one-third of the population aged over 15 years in each of these countries is obese. This has led to a range of other health issues including asthma, cardiovascular diseases and Type 2 Diabetes.

However, the rise in popularity of processed food has also been of great benefit to companies in the Middle East. While international companies have retained their leading positions in the production of packaged food, local players are expected to continue benefiting from their product innovation, distribution excellence and customer loyalty. Local manufacturers have been able to gain further market share because of their well-established brand names, large production capacity, excellent pricing and distribution strategies, and the acquisition of small suppliers.

This report was compiled from a variety of sources, using the most recent data available. It provides a profile of Saudi Arabia, Egypt and the U.A.E. in terms of demographics, economic climate and major consumer trends, followed by a discussion of new grain-based food and beverage product launches in each of the three markets. This report concludes with an overview of trends and sector growth according to product category. A comparative snapshot of key demographic and population statistics for Saudi Arabia, Egypt and the U.A.E. is provided in Annex A.

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## ▶ COUNTRY PROFILES

### SAUDI ARABIA

#### **Demographics**

- ▶ The total population of Saudi Arabia is 25,731,776, which includes 5,576,076 non-nationals. The population of Saudi Arabia has an estimated growth rate of 1.5% (CIA, 2010), and has grown by more than 40% since 1995, averaging a growth rate of just over 3% per year.
- ▶ This high growth rate is primarily due to a high fertility rate, improved health and living conditions leading to a decrease in the mortality rate and a rise in life expectancy. It is also attributable to the continuous influx of expatriate workers, some accompanied by their families.
- ▶ Saudi Arabia is a homogenous market with 90% of the population Arab and 10% Afro-Asian. One hundred percent of the population is Muslim (CIA, 2010).



Source: Shutterstock

#### **Per-Capita GDP**

- ▶ The GDP per capita in Saudi Arabia is US\$24,200 (2009 est.) (CIA, 2010).

#### **Health and Environmental Trends**

- ▶ With increasing longevity and alterations in lifestyle, there has been a change in the patterns of disease, with a marked increase in illnesses related to non-communicable diseases, in particular, diabetes and cardiovascular ailments. Heart attacks and strokes remain the primary causes of death. This is due to poor diets that are high in animal fats, as well as smoking and a lack of exercise.
- ▶ The obesity rate in Saudi Arabia continues to rise with 28.9% of the population regarded as obese. Obesity is a rather new phenomenon in Saudi Arabia that presented in the aftermath of the 1970s economic boom, and the new lifestyle that came with it. The adoption of Western-style eating habits, including fatty, fast food and carbonated soft drinks, has contributed to the rising obesity level, particularly among the young. A lack of public entertainment facilities has also resulted in social activities revolving around eating, whether in restaurants, with take-away, or at home. Moreover, urban development leads to dependence on cars as the cities sprawl over large areas.



Source: Planet Retail



Source: Planet Retail



## EGYPT

### Demographics

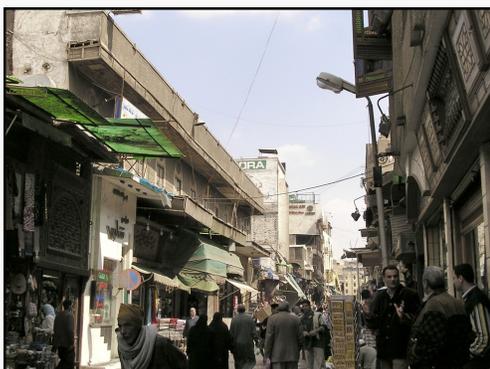
- ▶ Egypt has a population of 80,471,869, which is growing at an annual rate of about 2% (CIA, 2010; Euromonitor International, 2010c).
- ▶ With nearly a third of its population under the age of 14, and nearly half between the ages of 15 and 44, Egypt has a young burgeoning population ( Euromonitor International, 2010c). Growth in this young generation of consumers presents an important opportunity for Canadian industry, as young consumers' tastes and preferences more closely mirror those of North American and European markets (AAFC, 2007a).
- ▶ Egypt has a fairly homogeneous Arab population, as minority groups make up 0.4% of the total population. An estimated 4 million expatriates reside in Egypt (Euromonitor International, 2008).
- ▶ Disposable income is rising; between 2000 and 2007, annual disposable income per capita grew by 15.5%. Many couples are choosing to have fewer children, but single-person households continue to be rare, consisting mainly of widowed men and women. Given the importance of close family bonds in Egypt, it is considered unusual for other adults, particularly women, to live alone (Euromonitor International, 2008).

### Per-Capita GDP

- ▶ The GDP per capita in Egypt is US \$6,200 (2009 est.) (CIA, 2010).

### Health and Environmental Trends

- ▶ The early establishment of a comprehensive nation-wide health system has provided most Egyptians with easy access to state medical and health services, through a network of rural and urban facilities: 95% of Egyptians live within 5 kilometres of a facility (WHO, 2009).
- ▶ Obesity rates in Egypt continue to rise as over a third of the population is regarded as obese. This is significantly higher than the average Euromonitor consumer lifestyle country, with an obesity rate of 15.5%.



Source: Shutterstock



Source: Planet Retail

*\*For more detailed information regarding Egypt's demographics, and health and environmental trends please refer to the March 2011 Agriculture and Agri-Food Canada report entitled, "The Egyptian Consumer: Behaviour, Attitudes, and Perceptions Toward Food Products."*



## UNITED ARAB EMIRATES

### **Demographics**

▶ Recent reports from the U.A.E. government suggest that the population reached 8 million in 2010 (U.A.E. National Bureau of Statistics, 2010). However, international organizations such as the United Nations have estimated total numbers at just under 5 million. This discrepancy can be partially explained by the fact that approximately 75% of those in the country are part of a huge transient expatriate-based workforce, a percentage that has been increasing over time at the expense of the proportion of Emirati people.

▶ In the period 1990 to 2007, the birth rate declined from 4.4 children per woman to 2.3, according to the World Health Organization's (WHO) World Health Statistics (2009). This drop has been attributed to the growing number of female expatriate workers in the U.A.E., but also to the changing role of Emirati women in society. Women are now better educated, have a greater interest in careers and tend to marry later, all factors that lead to lower birthrates.

▶ Emirati culture is based on its Middle-Eastern core. Although English prevails in the business world, Arabic is the national language and Islam is the predominant religion.

▶ The three largest groups of expatriates hail from India, Pakistan, and Bangladesh. Members of other Asian communities, including China, the Philippines, Thailand, Korea, Sri Lanka, Afghanistan and Iran make up a significant proportion of the workforce, as do Western expatriates from Europe, Australia, Northern Africa, Africa and Latin America (National Media Council, 2009).



Source: Shutterstock

### **Per-Capita GDP**

▶ The GDP per capita in the U.A.E. is US\$40,200 (2009 est.) (CIA, 2010).

### **Health and Environmental Trends**

▶ While the U.A.E. government has begun to make substantial progress in many areas of health, social issues and economics related to rapid development, it has also altered the overall lifestyle toward less physical activity and poor choices in diet. This has resulted in an obesity rate of approximately one third of the population, while three-quarters of the population is considered to be overweight<sup>1</sup>. The frequency of obesity among U.A.E. youth is two to three times greater than the recently published international standard, and the emergence of adult chronic illnesses such as cardiovascular diseases and Type 2 Diabetes are now common in children (Al-Haddad, Little and Ghafoor, 2005).

▶ The U.A.E. is responding to this overall health crisis with wide-ranging prevention initiatives, as well as by providing increased specialized patient care services. One example is a comprehensive new nutrition strategy based around World Health Organization guidelines (United Arab Emirates Ministry of Health, 2010).

<sup>1</sup>The terms obese and overweight are based on WHO definitions for adults (see <http://www.who.int/bmi>). For adults, 'overweight' means a body-mass index (BMI) of 25-29.9 kg/m<sup>2</sup> and 'obese' means a BMI of greater than 30 kg/m<sup>2</sup>.

\*For more detailed information on the United Arab Emirates' demographics, and health and environmental trends please refer to the December 2010 Agriculture and Agri-Food Canada report entitled, "The United Arab Emirates Consumer: Behaviour, Attitudes and Perceptions Towards Food Products."

► **NEW GRAIN-BASED PRODUCT RELEASES**



**SAUDI ARABIA**

There have been 166 new grain-based product releases in Saudi Arabia over the past year. The greatest number of launches were for sweet biscuits and cookies (55), followed by cakes, pastries and sweet goods (40), pasta (32), and bread and bread products (24). Savoury biscuits/crackers and snack bars accounted for another 15 products. These grain-based products accounted for almost 19% of the 893 total new product launches that took place between November 1, 2009 and November 1, 2010 (Table 1).

Over this same period, 13 companies accounted for 76 new product introductions, led by Al Rashed Bakeries and the Saudi Malco Group. An additional 65 companies accounted for the remaining 90 new product introductions (54.2%) as shown in Table 2.

While the majority (61.4%) of these new grain-based products did not make specified claims on their packaging, of those that did, the most widely reported claims were those related to no additives or preservatives (13.9% of claims), followed by those with low/no/reduced transfat (9%) and claiming ethical or environmentally-friendly packaging (6%). Also of note were claims related to Halal, premium, vegetarian, all natural and wholegrain. "Other" claims is a catch-all category for a number of claims with low levels of reporting (Table 3).

**Table 1: New Grain-based Product Releases in Saudi Arabia According to Category**

Category	Number of Variants	Number of Variants (%)
Bread and Bread Products	24	14.5
Cakes, Pastries & Sweet Goods	40	24.1
Pasta	32	19.3
Savoury Biscuits & Crackers	6	3.6
Snack/Cereal/Energy Bars	9	5.4
Sweet Biscuits & Cookies	55	33.1
<b>Total</b>	<b>166</b>	<b>100.0</b>

Source: Mintel GNPD retrieved November 1, 2010

**Table 2: New Grain-based Product Releases in Saudi Arabia According to Company**

Company	Number of Variants	Number of Variants (%)
Al Rashed Bakeries	8	4.8
Saudi Malco Group	8	4.8
Kellogg	7	4.2
Saudi Masterbaker	7	4.2
United Food Industries	7	4.2
COREX	6	3.6
Labor	6	3.6
Buitoni	5	3.0
Saudi Modern Foods	5	3.0
Zahra Automatic Bakery	5	3.0
McVitie's	4	2.4
National Biscuits & Confectionery	4	2.4
Western Bakeries	4	2.4
Other	90	54.2
<b>Total</b>	<b>166</b>	<b>100.0</b>

Source: Mintel GNPD retrieved November 1, 2010



Source: Mintel



**SAUDI ARABIA (continued...)**

**Table 3: New Grain-based Product Releases in Saudi Arabia According to Claims**

Claims	Number of Variants	Number of Variants (%)
Not Specified	102	61.4
No Additives/Preservatives	23	13.9
Halal	7	4.2
Ethical - Environmentally Friendly Package	10	6.0
All Natural Product	5	3.0
Low/No/Reduced Fat	4	2.4
Premium	7	4.2
Ease of Use	2	1.2
Low/No/Reduced Cholesterol	5	3.0
Children (5-12)	4	2.4
Vegetarian	6	3.6
Low/No/Reduced Allergen	2	1.2
Low/No/Reduced Transfat	15	9.0
Low/No/Reduced Sugar	2	1.2
Kosher	3	1.8
Microwaveable	3	1.8
Convenient Packaging	2	1.2
Wholegrain	4	2.4
Other	15	9.0
<b>Total*</b>	<b>166</b>	<b>100.0</b>

\*While the total % reflects the number of new products launched, the total number of variants is greater, reflecting multiple claims per product.

Source: Mintel GNPD retrieved November 1, 2010



Source: Mintel



Source: Mintel



Source: Mintel



## EGYPT

Of the 1271 new product releases in Egypt between November 1, 2009 and November 1, 2010, 251 were grain-based products. More than 60% of the new products were in the sweet biscuits/cookies category (151), followed by pasta (30 products), and cakes, pastries and sweet goods with 26 products (Table 4).

Over the same period, 18 companies accounted for 86 new product introductions, led by Unipex Dairy Products with 7 releases. An additional 106 companies accounted for the remaining 165 new product introductions (66%) as shown in Table 5.

While the majority (56.2%) of these new grain-based products did not make specified claims on their packaging, of those that did, the most widely reported claims were those related to no additives or preservatives (10.4% of claims), followed closely by ethical or environmentally-friendly packaging (9.6%) and kosher claims (7.6%) Also of note were claims related to vegetarian, wholegrain, and no/low/reduced transfat. "Other" claims is a catch-all category for a number of claims with low levels of reporting (Table 6).

**Table 4: New Grain-based Product Releases in Egypt According to Category**

Category	Number of Variants	Number of Variants (%)
Bread & Bread Products	13	5.2
Cakes, Pastries & Sweet Goods	26	10.4
Pasta	30	12.0
Savoury Biscuits/ Crackers	14	5.6
Snack/Cereal/ Energy Bars	17	6.8
Sweet Biscuits/ Cookies	151	60.2
<b>Total</b>	<b>251</b>	<b>100.0</b>

Source: Mintel GNPD retrieved November 1, 2010



Source: Mintel

**Table 5: New Grain-based Product Releases in Egypt According to Company**

Company	Number of Variants	Number of Variants (%)
Unipex Dairy Products	7	2.8
Egyptian Co. for Food Industries (ICE MAN) S.A.E.	6	2.4
Hana Food	6	2.4
Hero Group	6	2.4
Kraft Foods	6	2.4
Biscuits Leclerc	5	2.0
Carrefour	5	2.0
Grandour and Sons	5	2.0
Hawaii	4	1.6
Lu	4	1.6
McVitie's	4	1.6
Merba B.V.	4	1.6
Monginis Foods	4	1.6
Simsek	4	1.6
Vaasan & Vaasan	4	1.6
Vicenzi Biscotti	4	1.6
YCIC	4	1.6
Zaharni Izdelia	4	1.6
Other	165	66.0
<b>Total</b>	<b>251</b>	<b>100.0</b>

Source: Mintel GNPD retrieved November 1, 2010



## EGYPT (continued...)

**Table 6: New Grain-based Product Releases in Egypt According to Claims**

Claims	Number of Variants	Number of Variants (%)
Not Specified	141	56.2
No Additives/Preservatives	26	10.4
Kosher	19	7.6
Ethical - Environmentally Friendly Package	24	9.6
All Natural Product	7	2.8
Vegetarian	18	7.2
Halal	10	4.0
Premium	5	2.0
Children (5-12)	9	3.6
Wholegrain	18	7.2
Low/No/Reduced Transfat	13	5.2
Low/No/Reduced Cholesterol	5	2.0
Low/No/Reduced Sugar	2	0.8
Low/No/Reduced Fat	2	0.8
Vitamin/Mineral Fortified	6	2.4
Convenient Packaging	9	3.6
On-the-Go	4	1.6
Low/No/Reduced Allergen	2	0.8
Functional - Other	2	0.8
Other	29	11.6
<b>Total*</b>	<b>251</b>	<b>100.0</b>

\*While the total % reflects the number of new products launched, the total number of variants is greater, reflecting multiple claims per product.

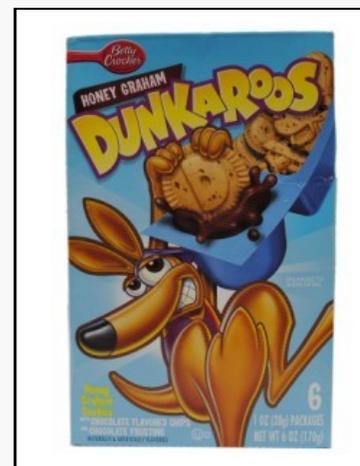
Source: Mintel GNPD retrieved November 1, 2010



Source: Mintel



Source: Mintel



Source: Mintel



## UNITED ARAB EMIRATES

There were 29 new grain-based products released in the United Arab Emirates (U.A.E.) representing almost one-quarter of the 118 new food product releases in the year beginning November 1, 2009. Because Datamonitor only began monitoring new product releases in the U.A.E. in 2009, there is more limited information on food and beverage introductions than is the case for Saudi Arabia and Egypt. Also, because the U.A.E. is not covered by Mintel (a global products database), some differences in categories and claims are evident in the following tables; however, every effort has been made to minimize these differences to enable comparability across markets (Table 7).

Between November 1, 2009 and November 1, 2010, 8 companies accounted for the 29 new products introduced into the U.A.E. grain-based product market. YLF Manufacturing Sdn. Bhd. accounted for more than half (51.7%) with 15 product introductions, followed by Nabisco Arabia Co. Ltd., with 6 products. The remaining 6 companies accounted for 8 new product introductions (27.6%) as shown in Table 8.

**Table 7: New Grain-based Product Releases in the United Arab Emirates According to Category**

Category	Number of Variants	Number of Variants (%)
Bread and Rolls	2	37.9
Cakes and Pastries	1	3.5
Pasta	0	0.0
Crackers (Savoury Biscuits)	15	51.7
Cereal Bars	0	0.0
Cookies (Sweet Biscuits)	11	37.9
<b>Total</b>	<b>29</b>	<b>100.0</b>

*Source: Datamonitor, Product Launch Analytics Download on March 17, 2011 for the period November 1, 2009 to November 1, 2010.*

**Table 8: New Grain-based Product Releases in the United Arab Emirates According to Company**

Company	Number of Variants	Number of Variants (%)
YLF Manufacturing Sdn. Bhd.	15	51.7
Nabisco Arabia Co. Ltd.	6	20.7
Elledi S.p.A.	2	6.9
IFFCO	2	6.9
Americana Group	1	3.5
CMI-2	1	3.5
IFFCO Group	1	3.4
Kraft Foods Inc.	1	3.4
<b>Total</b>	<b>29</b>	<b>100.0</b>

*Source: Datamonitor, Product Launch Analytics*



Source: Mintel

A sandwich-style biscuit with hazelnut cocoa cream.



Source: Mintel

Yellow cake mix.



## UNITED ARAB EMIRATES (continued...)

The Datamonitor Product Launch Analytics provided a more restricted list of product claims than was available from MINTEL's GNPD database. Even so, there were 8 different product claims made of grain-based products during the one-year period beginning November 1, 2009 (Table 9). More than one-third (38.4%) of packages with claims fell into an "others" category — all individual claims detailed by Datamonitor were reported once each. These claims reflected advertisements (such as targeting of kids), promoted the manufacturer/retailer (private label) or reflected the contents of the product from a nutritional/health perspective in terms of what they contained (i.e., high calcium, fiber or minerals) or what they did not contain (cholesterol or trans fats).

**Table 9: New Grain-based Product Releases in the United Arab Emirates According to Claims**

Claims	Number of Variants	Number of Variants (%)
Double Trademark	1	7.7
High Calcium	1	7.7
High Fibre	1	7.7
High Minerals	1	7.7
Kids	1	7.7
No Cholesterol	1	7.7
No Transfat	1	7.7
Private Label	1	7.7
Others	5	38.4
<b>Total</b>	<b>13</b>	<b>100.0</b>

**Source:** Datamonitor, Product Launch Analytics Download on March 17, 2011 for the period November 1, 2009 to November 1, 2010.



**Source:** Mintel



## ▶ TRENDS AND SECTOR GROWTH ACCORDING TO PRODUCT CATEGORY

### SAUDI ARABIA

This section provides tables on companies and brand share by percentage of value between the period 2003 to 2009 for pasta/noodles, savory biscuits, sweet biscuits, bread and rolls, and processed snacks in Saudi Arabia.

#### Noodles (Pasta and Asian Noodles)

Noodles increased in value by 6% in 2010 and hit record sales of US\$105 million. As in other packaged food categories in Saudi Arabia, sales of noodles were driven in 2009 by changing lifestyles, specifically the increasing number of women working outside of the home. As a result, they no longer have the time to spend in the kitchen preparing healthy and filling meals for their families and, therefore, turned to noodles, which represent a solution for a quick and easy-to-prepare meal.

Saudi consumers generally prefer meat based dishes to vegetarian dishes. However, the overriding preference in terms of red meat is lamb rather than beef. Saudis also prefer chicken, which is consumed on a regular basis and generally constitutes the main ingredient of traditional Saudi dishes. Thus, the preferred flavours for noodles in 2010 were various chicken-based flavours such as plain chicken, special chicken and chicken curry.

Volume sales of noodles are set to increase between 2010 and 2014 by 5% CAGR, compared to the 6% CAGR recorded during the 2006 to 2009 period. However, the slowdown in volume sales is expected to be mainly the result of the anticipated slowdown in marketing activities among key players, which will influence demand. Noodle manufacturers are expected to focus all of their marketing and promotional efforts during the holy month of Ramadan, when sales of packaged food tend to be very high, with demand for noodles predicted to remain more or less static for the remainder of the year (Euromonitor International 2010).

Noodles Brand Shares 2006-2009 % Retail Value RSP					
	Company	2006	2007	2008	2009
Indomie	Pinehill Arabia Food Ltd	66.6	67.4	68.4	69.2
Maggi	Saudi Food Industries Co Ltd	21.9	22.3	23.4	24.2
Hanaa	Binzagr Co	3.3	2.8	1.8	1.7
Karoma	Deemah - United Food Industries Corp Ltd	1.8	1.4	1.1	0.7
Nong Shim	Nong Shim Co Ltd	0.9	0.7	0.7	0.7
Supermi	Indofood Sukses Makmur Tbk PT	0.9	0.9	0.9	0.6
Batchelors	Campbell Soup Co	0.9	0.7	0.7	0.6
Private label	Private Label	0.4	0.5	0.6	0.6
Others	Others	3.3	3.3	2.4	1.7
<b>Total</b>	<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

Source: Euromonitor International, 2010



## SAUDI ARABIA (continued...)

### Bakery

Volume sales in 2010 grew almost in line with population growth. During the review period (2006 to 2010) the growth of the bakery product category as a whole continued to be driven by bread. Saudis are ranked second worldwide in terms of per-capita bread consumption, and tend to buy their bread fresh daily, disposing any bread from the previous day. Bakeries in Saudi Arabia produce more than 150 types of bread, which is mainly due to the impact of foreign residents.

Packaged/industrial bread, cakes and bread substitutes' sales continued to grow in 2010 at the expense of artisanal products. The increase in supermarket and hypermarket numbers is continuously supporting this growth, in addition to the changes taking place in the lifestyles of consumers. Consumers prefer the one-stop shopping concept more than ever before. Branded baked goods are available from leading bakeries such as Al Rasheed Food Co, Western Bakeries Co and Herfy Food Service Co Ltd. Other multinational bakeries such as Wooden Bakeries, have plans to expand during 2010 (Euromonitor International 2010).

Sales of Baked Goods by Category: Value 2005-2010 US millions (fixed exchange rate)						
	2005	2006	2007	2008	2009	2010
Bread	1,199.82	1,256.60	1,360.28	1,642.94	1,884.77	2,027.28
Bread Substitutes	55.99	67.35	77.72	89.39	101.18	109.16
Packaged/Industrial Bread	479.48	502.97	548.24	701.75	809.12	879.35
Unpackaged/Artisanal Bread	664.35	686.27	734.31	851.80	974.46	1,038.78
Cakes	274.92	287.80	304.17	344.55	387.19	412.08
Packaged/Industrial Cakes	33.69	35.71	38.21	43.75	49.71	53.58
Unpackaged/Artisanal Cakes	241.23	252.09	265.95	300.79	337.49	358.50
Pastries	602.36	646.14	701.53	808.85	922.68	996.93
Packaged/Industrial Pastries	72.20	78.34	85.47	99.14	113.62	123.28
Unpackaged/Artisanal Pastries	530.16	567.80	616.07	709.71	809.07	873.66
<b>Total Baked Goods</b>	<b>2,077.10</b>	<b>2,190.54</b>	<b>2,365.98</b>	<b>2,796.34</b>	<b>3,194.64</b>	<b>3,436.30</b>

Source: Euromonitor International, 2010



Source: Mintel



Source: Mintel



Baked Goods Brand Shares 2006-2009 % Retail Value RSP					
	Company	2006	2007	2008	2009
Al Rasheed	Al Rasheed Food Co	3.0	3.1	3.3	3.5
Lusine	Western Bakeries Co	2.1	2.3	2.8	2.9
Herfy	Herfy Food Service Co Ltd	2.0	2.2	2.4	2.6
Americana	National Food Co (Americana)	1.8	1.9	1.7	1.6
Switz	Saudi Masterbakers Ltd	1.1	1.2	1.3	1.4
Al Matrood	Al Matrood Bakeries	1.0	1.0	1.2	1.3
Eastern Bakeries	Eastern Bakeries	0.6	0.6	0.8	0.9
Al Jazea	Al Jazea Bakeries	0.6	0.6	0.6	0.6
Al Hasa	Al Hasa Automatic Bakeries Co	0.5	0.5	0.6	0.6
Mumtaz	Mumtaz Bakeries	0.5	0.5	0.5	0.5
Tasali	Saudi Snack Foods Co	0.5	0.5	0.5	0.4
Halwani	Halwani Bros Co	0.3	0.3	0.3	0.3
Al Karamah	Al Karamah Doughs Co Ltd	0.4	0.4	0.3	0.3
Al Khaleej	Hilwani & Tahhan Food Co	0.2	0.3	0.3	0.3
Champion	National Biscuits & Confectionery Co Ltd	0.2	0.2	0.2	0.3
Tea Shop	National Biscuits & Confectionery Co Ltd	0.2	0.2	0.2	0.2
Shams	Shams Co	0.2	0.2	0.2	0.2
Deemah	Deemah - United Food Industries Corp Ltd	0.1	0.2	0.2	0.2
Qaramish	Saudi Masterbakers Ltd	0.3	0.3	0.2	0.2
Sahary	Sahary Food Industries Co	0.1	0.1	0.2	0.2
Yamamah	Al Jazirah Food Processing Co Ltd	0.1	0.1	0.1	0.1
Artisanal	Artisanal	68.8	68.3	66.6	66.4
Others	Others	15.4	15.0	15.5	15.0
<b>Total</b>	<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

Source: Euromonitor International, 2010

### Snack Bars

Current value sales of snack bars increased 15% in 2010 to reach US\$15 million. Energy and nutrition bars led the category growth with retail value sales up over 50% in 2010 to exceed US\$1.2 million. Energy and nutrition bars continued to see the highest growth in 2010. Rising from a low base, the category experienced several product launches during 2007, such as the Arosa Hi-Fibre brand from Arosa AG, Nature Valley Natural Energy Bar from General Mills Inc, Sunny Crunch Energy from Sunny Crunch Foods Ltd and Temmy's Power Flake Bar from Mass Food Co (Euromonitor International 2010).

**SAUDI ARABIA (continued...)**



<b>Sales of Snack Bars by Category: Value 2005-2010</b> US millions (fixed 2010 exchange rate)						
	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>
Breakfast Bars	1.8	2.1	2.4	2.8	3.2	3.5
Energy and Nutrition Bars	-	0.0	0.3	0.5	0.8	1.2
Fruit Bars	0.9	1.1	1.3	1.4	1.6	1.8
Granola/Muesli Bars	3.3	3.7	4.1	4.9	5.8	6.7
Other Snack Bars	1.0	1.0	1.1	1.2	1.3	1.3
<b>Total Snack Bars</b>	<b>7.0</b>	<b>8.0</b>	<b>9.1</b>	<b>10.7</b>	<b>12.7</b>	<b>14.6</b>

Source: Euromonitor International, 2010

<b>Snack Bars Brand Shares 2006-2009</b> % Retail Value RSP					
	<b>Company</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>
Sunny Crunch	Sunny Crunch Foods Ltd	8.3	13.3	14.9	16.9
Temmy's	Mass Food Co	-	2.6	9.7	12.6
Master Choice	Great Atlantic & Pacific Tea Co Inc, The (A&P)	12.9	12.5	11.6	10.4
Alpen	Weetabix Ltd	5.5	6.7	8.8	9.3
Nature Valley	General Mills Inc	1.2	3.8	4.7	5.7
Quaker Chewy	Quaker Oats Co, The	10.3	8.1	6.8	5.5
Balisto	Mars Inc	-	-	4.1	5.5
Tema	National Confectionery & Tahina Factory	2.0	3.9	5.0	5.1
Kellogg's Nutri-Grain	Kellogg Co	5.3	5.5	4.9	4.3
Kellogg's Rice Krispies	Kellogg Co	5.1	4.5	3.6	2.7
Kellogg's Special K	Kellogg Co	2.1	2.4	2.3	2.0
Galín	Galín Lavashak Co	0.7	1.1	1.6	1.9
Generics	Generics	3.3	2.6	2.2	1.8
Betty Crocker	Betty Crocker Co	5.3	3.1	2.2	1.7
Healthy Valley	Healthy Valley Co, The	8.1	6.0	2.6	1.5
Arosa Hi-Fibre	Arosa AG	0.3	1.2	1.1	1.2
Cadbury's Brunchbar	Cadbury Plc	-	-	1.2	1.0
Be Natural	Be Natural Snack Co	-	0.6	0.7	0.9
SnackWell's	Nabisco Arabia Co Ltd (NAARCO)	7.2	4.6	1.0	0.4
Crisp	Sweethome Farms	2.1	1.4	0.5	0.2
Le Clerc	Biscuits Leclerc Ltd	1.3	1.0	0.4	0.1
Kroger	Kroger Co	2.8	1.8	0.2	-
Cadbury's Brunchbar	Cadbury Schweppes Plc	1.1	1.3	-	-
Others	Others	15.3	12.3	9.9	9.3
<b>Total</b>	<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

Source: Euromonitor International, 2010



## EGYPT

This section provides tables on companies and brand share by percentage of value between the period 2003 to 2009 for pasta/noodles, savory biscuits, sweet biscuits, bread and rolls, and processed snacks in Egypt.

### Noodles (Pasta and Asian Noodle)

Noodles increased in value and volume by an impressive 25% in 2010, increasing to US\$20 million in value and 5,500 tonnes in volume. The main reason for the constantly increasing sales of noodles in Egypt is their low retail price. Noodles are affordable not only for Egypt's high income minority; even the lowest income Egyptians can afford to consume noodles. Instant pouch noodles can easily be prepared at home or at work as only hot water is required to prepare the product for consumption. Working hours continue to increase in Egypt and workplaces tend not to be equipped with cafeterias, making noodles an attractive option for those who wish to have a warm snack as a change from cold foods such as sandwiches. In addition, the number of Egyptian women working full time continued to increase in 2010 and noodles became more popular as a quick and easy meal solution for busy working mothers. The leading brand of noodle is Indomie by Indofood Sukses Makum Tbk PT holding 85.5% of the market share (Euromonitor International, 2010).

Sales of Noodles by Category: Value 2005-2010 US '000 (Fixed 2010 Exchange Rate)						
	2005	2006	2007	2008	2009	2010
Chilled Noodles	-	-	-	-	-	-
Frozen Noodles	-	-	-	-	-	-
Instant Noodles	5,021.6	6,043.5	7,820.4	11,864.6	16,112	20,140
Plain Noodles	-	-	-	-	-	-
Snack Noodles	-	-	-	-	-	-
<b>Total Noodles</b>	<b>5,021.6</b>	<b>6,043.5</b>	<b>7,820.4</b>	<b>11,864.6</b>	<b>16,112</b>	<b>20,140</b>

Source: Euromonitor International, 2010



Source: Mintel

Noodles Brand Shares 2006-2009 % Retail Value RSP					
	Company	2006	2007	2008	2009
Indomie	Indofood Sukses Makmur Tbk PT	82.8	88.1	85.3	85.5
Koka	Tat Hui Foods Pte Ltd	5.7	4.9	5.3	5.8
Fantastic	Fantastic Foods Inc	3.1	2.1	2.3	2.5
Pot Noodle	Bestfoods Egypt	0.3	0.4	0.3	0.3
Express	Mass Food Co	-	-	-	0.2
Michi	Bini	0.6	0.2	0.2	-
Others	Others	7.5	4.4	6.6	5.7
<b>Total</b>	<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

Source: Euromonitor International, 2010



Source: Mintel

## EGYPT (continued...)



### Bakery

Baked goods in Egypt grew at a rate of 3% in value over 2010. This continued growth, slightly lower than the average growth of the review period between 2006 to 2009, was due to price increases across the board, but was not enough to lower volume sales since many of these products are staples in the typical Egyptian diet. The Egyptian government reduced its budget for subsidised goods resulting in suppliers and manufacturers unable to keep their prices as low as they previously had, contributing to slowed value growth .

Artisanal products made up the majority of the product segment in baked goods with a 97% value-share. The reason for this is that artisanal breads, pastries and cakes are all relatively inexpensive and therefore appeal to the majority of lower income earners. They are also seen as fresher and healthier in the eyes of the majority of the population. Most Egyptians are accustomed to this type of bread as it has been part of their culture for many years (Euromonitor International 2010).

Sales of Baked Goods by Category: Value 2005-2010						
US millions (Fixed Exchange Rate)						
	2005	2006	2007	2008	2009	2010
<b>Bread</b>	3,626.56	3,790.04	3,972.80	4,173.41	4,341.03	4,450.07
Bread Substitutes	-	-	-	-	-	-
Packaged/Industrial Bread	60.20	63.08	66.87	72.28	75.88	78.22
Unpackaged/Artisanal Bread	3,566.37	3,726.96	3,905.75	4,101.13	4,265.15	4,371.85
<b>Cakes</b>	48.30	53.53	63.98	74.26	77.50	81.29
Packaged/Industrial Cakes	19.83	23.97	33.34	42.36	45.06	48.66
Unpackaged/Artisanal Cakes	28.48	29.56	30.64	31.90	32.26	32.62
<b>Pastries</b>	38.75	44.88	52.27	60.92	65.97	71.37
Packaged/Industrial Pastries	19.83	21.99	25.95	31.90	36.05	40.91
Unpackaged/Artisanal Pastries	18.92	22.89	26.31	29.02	29.92	30.46
<b>Total Baked Goods</b>	3,713.62	3,888.45	4,089.05	4,308.40	4,484.32	4,602.73

Source: Euromonitor International, 2010

Baked Goods Brand Shares 2006-2009					
% Retail Value RSP					
	Company	2006	2007	2008	2009
Molto	Edita for Food Industries SAE	0.3	0.3	0.4	0.5
Rich Bake	Modern Bakeries 6 Of October SAE	0.5	0.5	0.5	0.5
Faragello	Egyptian Advanced Food Industries	0.4	0.4	0.4	0.4
Cup Cake	Edita for Food Industries SAE	0.2	0.2	0.3	0.3
Twinkies	Edita for Food Industries SAE	0.1	0.2	0.3	0.3
Monginis	Monginis Foods Ltd	0.2	0.2	0.3	0.3
Hohos	Edita for Food Industries SAE	0.1	0.2	0.2	0.3
Lebanese Bread	Egyptian Lebanese for Foods	0.2	0.2	0.2	0.2
Nity	Family Nutrition SAE	0.1	0.1	0.0	0.0
Artisanal	Artisanal	97.2	96.9	96.6	96.5
Others	Others	0.7	0.8	0.8	0.7
<b>Total</b>	<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

Source: Euromonitor International, 2010



## EGYPT (continued...)

### Snack Bars

Snack bars have remained a very small segment in Egypt ever since their introduction by the Mass Food Co. The product did not prove as successful as they anticipated. Products such as chocolate bar biscuits and other items present in the segment for many years are preferred amongst the majority of the Egyptian population who fall below the poverty line.

Young Egyptians are the main consumers of most snack bars, contributing to the popularity of breakfast bars since these are popular abroad. Most consumers of these products fall in the higher income groups, as they can afford to travel to western countries and experience consumer practices not generally present in Egypt.

Energy and nutrition bars grew by 4% between 2009 and 2010 in value. These products are becoming more popular amongst higher income earners as they become more health and weight conscious. These bars are consumed pre or post workout for energy and satiety. The number of higher income earners registering gym memberships is on the rise, as people become increasingly weight conscious in Egypt (Euromonitor International 2010).

Sales of Snack Bars by Category: Value 2005-2010 US '000 (Fixed 2010 Exchange Rate)						
	2005	2006	2007	2008	2009	2010
Breakfast Bars	-	-	-	62.0	64.2	66.6
Energy and Nutrition Bars	-	-	-	24.9	25.7	26.8
Fruit Bars	-	-	-	24.5	25.7	26.5
Granola/Muesli Bars	-	-	-	85.6	88.2	89.1
Other Snack Bars	-	-	-	-	-	-
<b>Total Snack Bars</b>	-	-	-	<b>197.0</b>	<b>203.8</b>	<b>209.0</b>

Source: Euromonitor International, 2010

Snack Bars Brand Shares 2006-2009 % Retail Value RSP					
	Company	2006	2007	2008	2009
Temmy's	Mass Food Co	-	-	74.5	76.5
Alpen	Weetabix Ltd	-	-	4.4	5.8
Nature Valley	General Mills Inc	-	-	2.2	3.5
Kellogg's Coco Pops	Kellogg Co	-	-	0.9	2.5
Others	Others	-	-	18.0	11.7
<b>Total</b>	<b>Total</b>	-	-	<b>100.0</b>	<b>100.0</b>

Source: Euromonitor International, 2010

## UNITED ARAB EMIRATES



This section provides tables on companies and brand share by percentage value between the period of 2003 to 2009 for pasta/noodles, savory biscuits, sweet biscuits, bread and rolls, and processed snacks in the United Arab Emirates (U.A.E.).

### Noodles (Pasta and Asian Noodle)

The Barilla brand continues to dominate the dried pasta and noodles market in the U.A.E. with 16.1% of the market. Spigaddoro and private label brands follow the brand leader with 7.0% and 6.9% market shares, respectively.

United Arab Emirates Dried pasta/noodles brand share, by value, 2003-2009 (%)								
Company	Brand	2003	2004	2005	2006	2007	2008	2009
Barilla Holding Società per Azioni	Barilla	15.4	15.5	15.6	15.8	15.9	16.0	16.1
Conga Foods Pty Ltd	Spigaddoro	6.3	6.4	6.5	6.7	6.8	6.9	7.0
Private Label	Private Label	6.2	6.3	6.4	6.6	6.7	6.8	6.9
Al Ghurair Group	Jenan	5.4	5.6	5.7	5.8	5.9	6.0	6.1
IFFCO Group	Others	4.4	4.6	4.6	4.7	4.9	5.0	5.1
Food Manufacturing Group Co.	Al Alali	4.2	4.2	4.2	4.2	4.2	4.2	4.2
Nestle S.A.	Maggi	3.4	3.6	3.7	3.8	3.9	4.0	4.1
H.J. Heinz Company	Honig	3.2	3.3	3.4	3.6	3.7	3.8	3.9
Emirates Macaroni Factory	Others	3.1	3.1	3.1	3.1	3.1	3.1	3.2
Ebro Puleva S.A	Panzani	0.0	0.0	2.7	2.8	2.9	3.0	3.1
Riso Gallo S.p.A	Gallo	2.1	2.2	2.3	2.4	2.6	2.7	2.8
Pasta ZARA SpA	Pastazara	1.3	1.4	1.6	1.6	1.8	1.9	2.0
Nestle S.A.	Butoni	1.2	1.2	1.2	1.2	1.2	1.2	1.2
Riso Scotti S.p.A.	Scotti	1.1	1.1	1.1	1.1	1.1	1.1	1.1
Gruppo Colussi	Panzani	2.4	2.6	0.0	0.0	0.0	0.0	0.0
Others	Others	40.1	38.9	37.8	36.7	35.5	34.3	33.2
<b>Total</b>		<b>100.0</b>						

Source: Datamonitor. Retrieved December 2010.



Source: Mintel



Source: Mintel



Source: Mintel



## UNITED ARAB EMIRATES (continued...)

### Crackers

Since 2007, the U.A.E. market has been dominated by two companies, Kraft Food inc. and IFFCO Group, who hold 56.8% of brand share. During the review period, the remaining companies have seen small incremental gains in brand share, at the expense of the others category.

United Arab Emirates Crackers (savory biscuits) brand share, by value, 2003-2009 (%)								
Company	Brand	2003	2004	2005	2006	2007	2008	2009
Kraft Foods, Inc.	Others	0.0	0.0	0.0	0.0	38.5	38.8	39.0
IFFCO Group	Tiffany	16.8	16.9	17.1	17.3	17.4	17.6	17.8
Unilever	Hellmann's	4.4	4.6	4.7	4.8	5.0	5.2	5.3
Lorenz Bahlsen Snack-World GmbH & Co KG	Leibniz	4.7	4.8	4.9	5.0	5.0	5.1	5.2
Britannia Industries Ltd.	Others	4.5	4.5	4.6	4.6	4.6	4.6	4.7
H.J. Heinz Company	Farley's	2.8	2.9	3.0	3.0	3.1	3.1	3.2
The Fine Confectionery Company	Loaker	2.3	2.3	2.4	2.5	2.6	2.6	2.7
Parle Products Pvt. Ltd.	Krack Jack	1.3	1.4	1.5	1.5	1.6	1.7	1.8
Altria Group, Inc.	Others	37.5	37.7	38.0	38.3	0.0	0.0	0.0
Others	Others	25.8	24.8	24.0	23.1	22.2	21.3	20.3
<b>Total</b>		<b>100.0</b>						

Source: Datamonitor. Retrieved December 2010.

### Breads and Rolls

This product category clearly reflects U.A.E. consumer preferences for artisanal products from local bakeries versus a branded product. Artisanal products hold a 58% brand share. This is likely due to the the large expatriate population. IFFCO Group does hold the leadership position amongst companies with a 12.9% share.

United Arab Emirates Bread & rolls brand share, by value, 2003-2009 (%)								
Company	Brand	2003	2004	2005	2006	2007	2008	2009
Artisanal producers	Artisanal producers	58.0	58.6	58.8	58.8	58.6	58.3	58.0
IFFCO Group	Others	12.3	12.4	12.5	12.6	12.7	12.8	12.9
Modern Bakery L.L.C.	Others	6.4	6.3	6.3	6.4	6.4	6.5	6.6
Kraft Foods, Inc.	Kraft	0.0	0.0	0.0	0.0	5.4	5.5	5.6
Private Label	Private Label	4.7	4.8	4.9	5.0	5.1	5.1	5.2
Al Jadeed Bakery L.L.C	Others	3.9	3.9	3.8	3.8	3.8	3.7	3.7
Dubai Delite Bakery	Others	1.2	1.2	1.3	1.3	1.3	1.3	1.4
Altria Group, Inc.	Kraft	5.2	5.3	5.3	5.4	0.0	0.0	0.0
Others	Others	8.2	7.5	7.0	6.8	6.7	6.7	6.6
<b>Total</b>		<b>100.0</b>						

Source: Datamonitor. Retrieved December 2010.

## UNITED ARAB EMIRATES (continued...)



### Cookies

There are numerous companies in the cookie segment of the marketplace. The Americana Group is the leading manufacturer with 11% brand share.

United Arab Emirates Cookies (sweet biscuits) brand share, by value, 2003-2009 (%)								
Company	Brand	2003	2004	2005	2006	2007	2008	2009
Americana Group	Americana	10.5	10.6	10.6	10.6	10.7	10.8	11.0
Private Label	Private Label	8.1	8.2	8.3	8.3	8.4	8.6	8.7
Britannia Industries Ltd.	Good Day	6.1	6.2	6.3	6.5	6.6	6.7	6.8
IFFCO Group	Tiffany	4.2	4.3	4.4	4.5	4.6	4.8	4.9
Americana Group	California Garden	4.3	4.3	4.3	4.3	4.4	4.4	4.4
Americana Group	Others	4.2	4.2	4.2	4.2	4.1	4.0	3.9
H.J. Heinz Company	Weight Watchers	2.6	2.7	2.8	2.9	3.0	3.0	3.0
Britannia Industries Ltd.	Others	2.2	2.3	2.4	2.5	2.7	2.8	2.9
Walkers Shortbread Ltd.	Walkers	2.2	2.3	2.4	2.5	2.6	2.7	2.9
Kraft Foods, Inc.	Others	0.0	0.0	0.0	0.0	2.8	2.8	2.8
H.J. Heinz Company	Weight Watchers	2.0	2.1	2.2	2.3	2.4	2.5	2.6
Unilever	Hellmann's	1.5	1.6	1.6	1.7	1.8	1.9	1.9
Parle Products Pvt. Ltd.	Others	1.1	1.2	1.2	1.3	1.3	1.4	1.4
ITC Limited	Others	1.0	1.0	1.1	1.1	1.2	1.2	1.3
Altria Group, Inc.	Others	2.7	2.8	2.8	2.8	0.0	0.0	0.0
Others	Others	47.1	46.2	45.2	44.3	43.5	42.6	41.7
<b>Total</b>		<b>100.0</b>						

Source: Datamonitor. Retrieved December 2010.

### Processed Snacks

Since 2003, Haldiram Manufacturing Co.Pvt.Ltd has held over 25% of the brand share of processed snacks in the U.A.E. Pepsico Inc. has been gathering momentum since they entered the market in 2006, and held a 14% share in 2009. Hunter Foods Limited FZCO and the Procter & Gamble Company, hold shares of 11.2% and 9.0% respectively.

United Arab Emirates Processed snacks brand share, by value, 2003-2009 (%)								
Company	Brand	2003	2004	2005	2006	2007	2008	2009
Haldiram Manufacturing Co. Pvt. Ltd	Haldiram's	25.4	25.6	25.7	25.8	25.9	26.0	26.1
Pepsico, Inc.	Others	0.0	0.0	0.0	11.1	11.3	12.7	14.2
Hunter Foods Limited FZCO.	Others	10.3	10.5	10.6	10.8	10.9	11.1	11.2
Procter & Gamble Company, The	Pringles	8.4	8.5	8.6	8.7	8.8	8.9	9.0
Ami's Foods Industries FZCO	Ami's	3.3	3.4	3.6	3.7	3.8	3.8	3.8
Star Foods S.A.	Others	10.8	10.9	11.0	0.0	0.0	0.0	0.0
Others	Others	41.6	41.1	40.5	39.9	39.3	37.5	35.7
<b>Total</b>		<b>100.0</b>						

Source: Datamonitor. Retrieved December 2010.



## ▶ CONCLUSION

With the challenges of soaring obesity rates and consumer demand for convenience, comes opportunities for creative and healthy alternatives within grain-based product categories. Changing lifestyles in the region are greatly influenced by the increasing number of women entering the workforce, and growing interest in a more western-style diet. Product releases will need to meet the growing demand for processed food as households continue to seek quick meal solutions for all eating occasions. There is already a growing number of products introduced as retailers and food manufacturers address these changing household needs.

The competitive landscape is slowly changing as larger corporations enter the marketplace through acquisitions and/or mergers. However, most product categories are characterized by numerous processors and brands. Companies interested in the region will need to further explore the consumers, competitors, and existing products in the marketplace to identify both mainstream and niche product opportunities.

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<b>KEY DEMOGRAPHICS - COMPARATIVE SNAPSHOT</b>			
	<b>United Arab Emirates (2011 est.)</b>	<b>Saudi Arabia (2011 est.)</b>	<b>Egypt (2011 est.)</b>
<b>POPULATION</b>			
Population	5,148,664	26,131,703	82,079,636
Annual Growth Rate (%)	3.282	1.536	1.96
Male/Female Ratio	2.2	1.17	1.03
Population in urban areas (%)	84 (2010)	82 (2010)	43.4 (2010)
Average Life Expectancy (Men and Women)	76.51	74.11	72.66
Average Life Expectancy—Women	79.22	76.16	75.38
Average Life Expectancy—Men	73.94	72.15	70.07
Fertility Rate (per woman)	2.4	2.31	3.01
<b>ETHNICITY</b>			
Ethnicity	19% Emirati, 23% other Arab and Iranian, 50% South Asian, 8% other expatriates	90% Arab, 10% Afro-Asian	99.6% Egyptian, 0.4% other
Official Language	Arabic	Arabic	Arabic
Religion	96% Muslim, 4% other	100% Muslim	90% Muslim, 9% Coptic, 1% other Christian
<b>EDUCATION</b>			
Literacy Rate (% , Men and Women)	77.9 (2003)	78.8 (2003)	71.4 (2005)
Literacy Rate (% , Men)	76.1(2003)	84.7 (2003)	83 (2005)
Literacy Rate (% , Women)	81.7 (2003)	70.8 (2003)	59.4 (2005)
Education expenditures (% of GDP)	0.9 (2008)	5.7 (2008)	3.8 (2008)
<b>HEALTH</b>			
Obesity rate (% of population)	30	28.9	34.5
<b>ECONOMY</b>			
Per-capita GDP (US\$)	\$40 200 (2008)	\$24 200 (2010)	\$6200 (2010)

Source: CIA World Factbook, 2011.

The Government of Canada has prepared this report based on primary and secondary sources of information. Although every effort has been made to ensure that the information is accurate, Agriculture and Agri-Food Canada assumes no liability for any actions taken based on the information contained herein.

**Saudi Arabia, Egypt and the United Arab Emirates:  
Consumers, Markets, and Demand for Grain-based Products**

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