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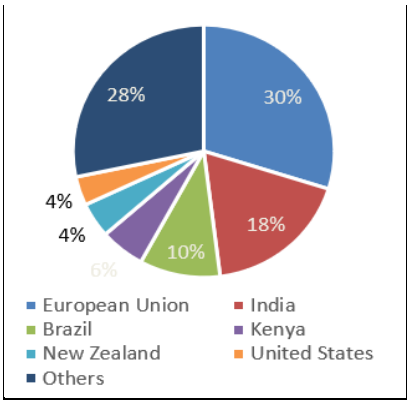
Report Highlights:

Egypt's retail food market continues to expand, driven by a growing urban population increasingly seeking diverse food products and international cuisines. While small local grocers remain dominant, representing close to two-thirds of sales by value, convenience and price continue to shape the majority of Egyptian consumer buying decisions, presenting growth opportunities across all retail channels. Investments in urban centers and a thriving tourism sector is further fueling retail expansion. Consumer-oriented imports rose notably in early 2026 compared to the same period last year, with particularly strong growth in meat products, specialty food preparations, tree nuts, and confectionery. The United States remains a key supplier in several of these categories and continues to rank among Egypt's top sources of consumer-oriented food products.

Executive Summary:
Egypt, Africa's second-largest economy with approximately 110 million people, is in a period of macroeconomic recovery, supported by structural reforms and IMF-backed fiscal adjustments. Inflation, which peaked in 2024, is forecast to moderate in 2026. Egypt's tourism sector reached a record high in 2025 and has continued to grow into 2026. Consumer-oriented imports rose notably in 2025 and continued to climb in early 2026, reflecting strengthened domestic demand and improved economic conditions.

Top Consumer-Oriented Product Exporting Countries (2025)



Source: Trade Data Monitor (TDM)

Food Retail Industry:
Egypt's food retail market is expanding, with international and regional players competing alongside traditional small local grocers. E-commerce is growing rapidly, driven by demand for convenience. According to Euromonitor International©, packaged food retail sales reached $12.4 billion in 2024 and are forecast to nearly double by 2029.

Food Processing Industry:
The United States remains a key supplier of food processing ingredients to Egypt. Euromonitor International© reports that Egypt is the largest U.S. export market for processed foods in North Africa. Egypt's food processing sector continues to grow, with the government promoting the country as a regional manufacturing hub to multiple regions.

Food Service Industry:
According to Euromonitor International©, Egypt's hospitality sector was valued at $3.8 billion in 2024 and is expected to reach $4.7 billion by 2029. Despite economic challenges, dining out and café culture remain strong. Egypt's growing tourism industry continues to drive food service demand, while cloud kitchens and online delivery platforms are emerging as the fastest-growing segment.

Egypt Quick Facts CY 2025

Consumer-Oriented Imports *$4.5 billion*

List of Top 10 Growth Products

1) Processed Fruit 2) Chocolate/ Cocoa Products
3) Non-Alcoholic Bev. 4) Nursery Products
5) Spices 6) Processed Vegetables
7) Poultry Meat/ Products 8) Dog & Cat Food
9) Tree Nuts 10) Fresh Fruit

Food Industry by Channels (U.S. million)

Small Local Grocers	$12,479
Food/Drink/Tobacco Specialists	$2,546
Supermarkets	$1880
Hypermarkets	$849
Discounters	$832
Convenience Retailers	$808
Foods E-Commerce	$215

Top 10 Host Country Retailers (by sales)

1) Carrefour 2) Fathallah Market
3) Kazyon 4) Hyper One
5) Seoudi 6) Spinneys
7) Metro 8) Kheir Zaman
9) BIM 10) Alfa Market

GDP/Population

Population: 117 million (2026 est.)
GDP: $429.7 billion (2026 est.)
GDP per capita (USD): $3,904 (2026 est.) Inflation rate: 14.8% (2026 est.)

Sources: Euromonitor International©, IMF, TDM

Strengths	***Weaknesses***
-Large consumer market -Growing retail market	-High tariffs -Complex import regulations
Opportunities	***Threats***
-Growing tourism sector -Consumer interest in trends	-Competitors' free trade agreements -Competitors' proximity to Egypt

Section 1: Market Summary

The retail market in Egypt is primarily dominated by hypermarkets, supermarkets, and small local grocers, offering a diverse range of products to meet consumer need. Egypt's growing youth and urban populations, which are increasingly seeking diverse and specialty foods, is driving demand for modern retail formats — including supermarkets, hypermarkets, and malls — particularly in new urban centers.[1] For regional and international retailers, competing alongside traditional small grocers in Egypt presents significant upside as Egypt's retail market is viewed as underpenetrated.[2] Its large and growing population, youthful demographics, and increasing number of malls and modern urban areas make it an attractive destination for retail expansion.[3]

Emerging Trends:
At the same time, e-commerce is growing rapidly, driven by a population that is increasingly in search of modern convenience. Online food delivery platforms, including Talabat, Breadfast, and Rabbit, continue to grow, giving everyday Egyptians access to hundreds of food options, including international cuisine. While small local grocers dominate the retail market (representing more than 50 percent of sales {by value}), convenience and price will continue to drive the vast majority of Egyptian consumer buying decisions, presenting growth opportunities across all retail channels.

The supermarket sector is evolving rapidly. Many chains are developing their own private-label products, a segment that continues to grow in significance. At the same time, supermarkets are transforming into comprehensive food destinations; for example, Fresh Foods, Egypt's first upscale supermarket concept, now features in-store sushi counters, specialty cafes, Italian delicatessens, and other freshly prepared options, a concept that is gaining wide consumer acceptance. Some supermarkets are taking this further by pioneering a dining-integrated retail model: shoppers select raw ingredients or prepared meals from the store floor, have them cooked fresh on-site, and dine in an adjoining restaurant — all under one roof. This approach blurs the line between grocery retail and foodservice, reflecting a broader industry shift toward experiential shopping.

Government Orders Shops/Restaurants to Close Early
By mid-March 2026, due to regional conflict, Egypt's energy import bill swelled to roughly 2 to 2.5 times pre-conflict levels as a result of higher global energy prices.[4] The cost of Egypt's monthly natural gas imports rose to $1.65 billion from roughly $560 million, despite unchanged volumes.[5] To manage the fiscal impact of rising costs and to reduce energy consumption, Egypt's cabinet approved a package of conservation measures starting March 28, including malls, retail stores (clothing, electronics, and household goods), restaurants, and cafés closing at

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[1] https://www.gafi.gov.eg/English/Sectors/TargetedSectors/Pages/Retail.aspx
[2] See Id.
[3] See Id.
[4] https://www.reuters.com/business/energy/egypts-energy-import-bill-more-than-doubles-global-prices-surge-2026-03-18/
[5] See Id.

9 p.m., and 10 p.m. on Fridays and Saturdays for a period of one month.[6] However, to ensure the public's basic needs were met, the food sector (along with other essential sectors), including supermarkets, grocery stores, bakeries, and fresh produce shops, were excluded from the mandatory closures.[7] After one month, Egypt lifted its early-closure mandate for shops, restaurants, and cafes nationwide, restoring normal operating hours effective April 28, 2026.[8]

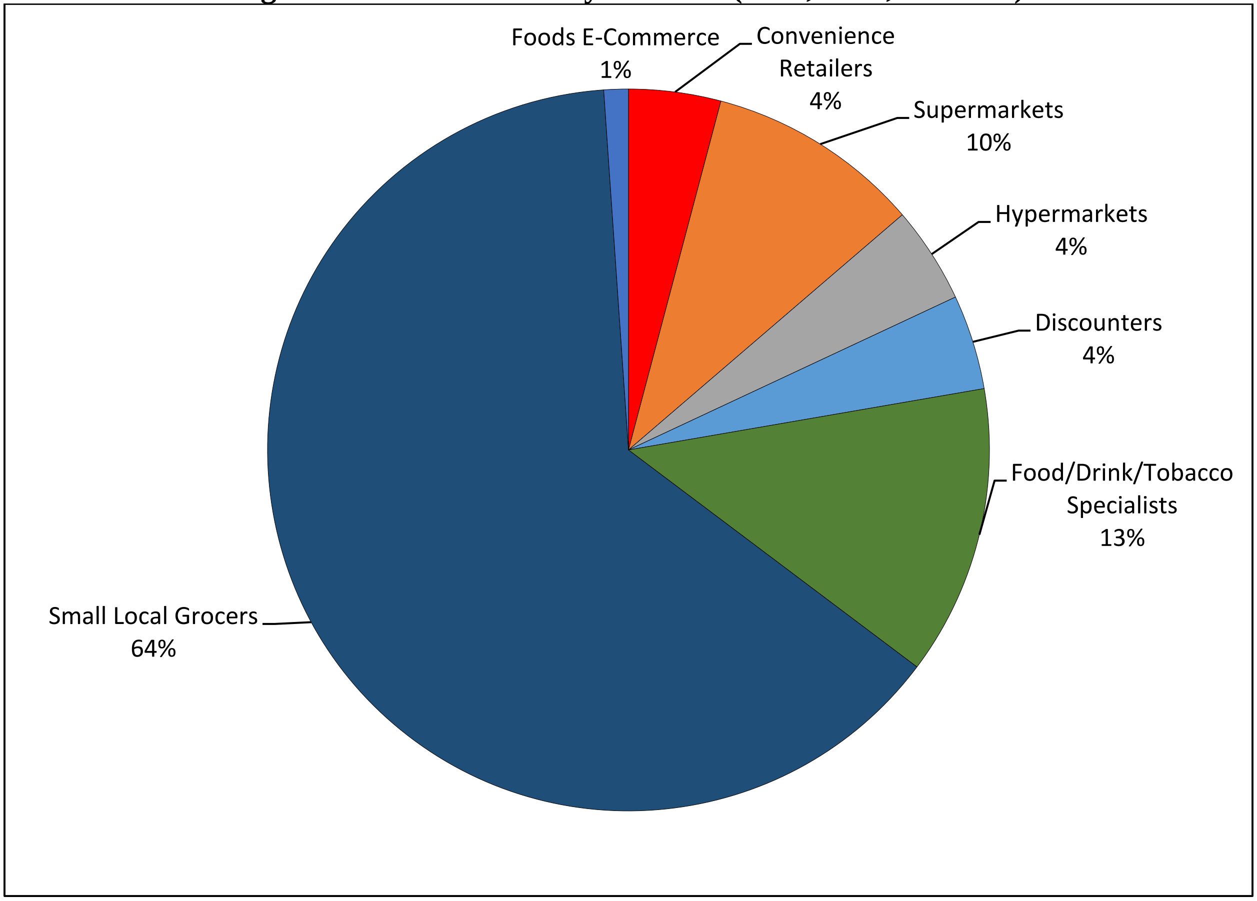
Advantages and Challenges:

ADVANTAGES	CHALLENGES
Egypt's food retail market is expanding, with international, regional, and traditional local players competing for share. E-commerce is growing rapidly on the back of rising demand for convenience, while a young, urban population is driving appetite for diverse and specialty foods — spurring retail expansion across urban centers.	A number of processed and high value food products, including poultry meat, face tariff rates ranging from 20-30 percent.[9]
Egypt's tourism sector is growing and, in turn, may spur further demand for food products in Egypt, especially from its HRI and retail sectors. Egypt's tourism sector caters to foreigners.	Egypt's economic challenges caused a slowdown in imports in 2023 as importers' struggles to access foreign currency to make payments and consumers increasingly spend their budgets on essentials. NOTE: Improvements were seen in 2025, and consumer-oriented import growth is continuing in 2026.
U.S. origin products continue to be accepted in the Egyptian market, as they are associated with high quality.	U.S. exporters face competition from geographically advantaged European Union (EU) Member States. Egypt has a free trade agreement with the EU, which sometimes puts U.S.-origin products at a disadvantage.
Egypt's food processors and manufacturers are exporting to the entire region and require more imported food ingredients. For this reason, Egypt markets itself as a hub to export to Europe, the Middle East, Africa, and Asia.	Egypt often refers to third-country standards for application in its own market, for example the EU. Import regulations are, at times, complex and lack transparency.

[6] https://www.arabnews.com/node/2638031/amp
[7] https://www.egyptindependent.com/egypt-exempts-4-essential-sectors-from-new-early-closing-rules/
[8] El-Shai - الشاي - It was confirmed today that the... | Facebook
[9] https://ustr.gov/sites/default/files/Egypt_0.pdf

Retail Sales by Channel:

Figure 1: Retail Market by Channel (2026, USD, Millions)



Source: Euromonitor International©

Section 2: Road Map for Market Entry

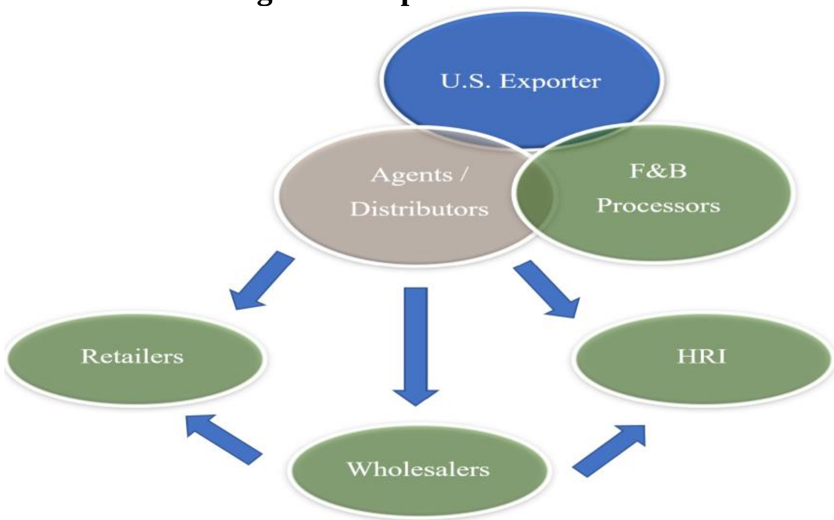
Entry Strategy

U.S. exporters should identify an Egyptian importer or distributor, with whom they can build a relationship. Egyptian firms are best suited to navigate local regulations, understand distribution chains, and have relationships with retailers, food processors, hotels, restaurants and institutions. For more information about trade shows in Egypt, which are excellent opportunities to meet retailers, distributors, food manufacturers, and key contacts in the food and beverages industry, please check the attached document (see GAIN-Guide to Egyptian Food and Beverage Trade Shows_Cairo_Egypt_EG2025-0005).

Market Structure

Egypt's market structure is straightforward. Importers are food processors, manufacturers, and/or agents/distributors of these. Large companies will source food ingredients and products directly to lower prices, guarantee product flow, and ensure quality. Agents/distributors service the food processing and manufacturing sectors, comprised of numerous fragmented small- and mediumsize companies. Smaller manufacturers purchase reduced quantities, do not import directly, pay in Egyptian pounds, and maintain small inventories.

Figure 2: Import Procedures



Egypt's retail food landscape is concentrated in two main hubs: Alexandria — Egypt's second-largest city, with a population of approximately 5.5 million[10] and home to the country's major importers and food manufacturers — anchors bulk procurement, while Cairo serves as the primary hub for distribution and consumer markets. According to FAS-Cairo contacts, retailers with branches in both cities tend to position their premium offerings in Cairo, reflecting the capital's larger and more affluent consumer base.

Figure 3: Company Profiles and Top Retailers

Company	Activity	Product Focus
Carrefour	Supermarket/Hypermarket	Domestic & Imported Goods
Mansour Group	Retail/Distribution	Domestic & Imported Goods
Seoudi	Retail	Domestic & Imported Goods
On-the-Run	Convenience Store	Domestic & Imported Goods
HyperOne	Retail	Domestic & Imported Goods
Spinneys Egypt	Retail	Domestic & Imported Goods
BIM	Retail	Primarily Domestic Goods
Kazyon	Retail	Primarily Domestic Goods
Gourmet Egypt	Retail	Domestic & Imported Goods
Fresh Foods	Retail	Domestic & Imported Goods
Alfa Market	Retail	Domestic & Imported Goods

Premium chains — Gourmet, Metro, Oscar, and Fresh Foods — are following wealthy shoppers into new developments and neighborhoods. At the other end, hard discounters like Kazyon and BIM are focused on lower-income neighborhoods.

[10] https://worldpopulationreview.com/cities/egypt/alexandria

Section 3: Competition

Egypt imported approximately $4.5 billion of consumer-oriented products in 2025, rising to an annualized pace of roughly $833 million in just January–February 2026, a 27% increase over the same period in 2025 signaling strong import growth to start the year. Egypt's consumer-oriented product imports are led by beef and beef products, dairy products, fresh fruit, soup and food preparations, and tree nuts. India remained the dominant supplier in 2025, accounting for $814 million (18 percent) of Egypt's imports (chiefly beef and beef products). Brazil, also a leading supplier of beef and beef products, ranked second with $448 million in 2025. The United States ranked as Egypt's sixth largest consumer-oriented product supplier in 2025, accounting for $166 million of Egypt's imports. U.S. products continue to face competition from European, African, and Middle Eastern suppliers who benefit from free trade agreements, shipping proximity, and lower production costs.

Figure 5: Egypt's Major Consumer-Oriented Imports and Competing Suppliers (Jan.–Feb. 2026)

Product Category and Total Import (USD)	Major Supply Sources (Import Market Share)	Strengths of Key Supply Countries	Advantages and Disadvantages of Egyptian Suppliers
Beef and Beef Products $254 million	1. India- 58% 2. Brazil- 28% **3. U.S.- 10%** 4. Australia- 1%	Low production cost	-Limited domestic production -High demand
Dairy Products $167 million	1. New Zealand- 21% 2. Germany- 11% 3. France- 9% **4. U.S.- 6%**	Duty-free access and year-round availability	-High demand
Fresh Fruit $65 million	1. Poland- 22% 2. Lebanon- 19% 3. Italy- 17% 4. Greece- 15% **U.S.- 0%**	EU duty-free access and proximity	-High demand
Soup and Food Preparations $63 million	1. Ireland- 24% 2. Germany- 10% 3. Saudi Arabia- 8% 4. Netherlands- 6% **U.S.- 3%**	EU duty-free access and proximity	-Limited domestic production -High demand
Tree Nuts $57 million	1. Vietnam- 24% **2. U.S.- 20%** 3. Turkey- 12% 4. Spain- 10%	Ideal growing conditions	-Limited domestic production -High demand

Chocolate and Cocoa Products $44 million	1. Malaysia- 14% 2. Netherlands- 13% 3. Spain- 12% 4. Cote d'Ivoire- 11% **U.S.- 0.02%**	High production scale and low production cost	-No local production -High demand
Spices $34 million	1. Vietnam- 26% 2. China- 13% 3. Guatemala- 12% 4. Brazil- 11% **U.S.- 0%**	Low production cost	-Limited domestic production -High demand
Tea $33 million	1. Kenya- 88% 2. UAE- 4% 3. India- 2% 4. Sri Lanka- 2% **U.S.- 0.02%**	Low production cost	-No local production -High demand
Processed Fruit $21 million	1. Turkey- 18% 2. China- 15% 3. Spain- 13% 4. Greece- 10% **U.S.- 2%**	EU duty-free access and proximity	-High demand
Processed Vegetables $15 million	1. China- 20% 2. Turkey- 16% 3. Spain- 12% 4. Netherlands- 9% **U.S.- 1%**	EU duty-free access and proximity	-High demand

Source: Trade Data Monitor

Section 4: Best Product Prospects

- Products present in the market with good sales potential, including **beef**, **dairy**, **tree nuts** (especially **pistachios and almonds**), **soups and food preparations**, **processed vegetables and fruit**, **spices**, and **bakery ingredients**, continue to represent strong prospects for U.S. exporters. Egypt remains an important market for U.S. beef liver, with the country being by far the largest export market for U.S. frozen beef livers.
- U.S. beef is well known for its quality among affluent buyers and represent a category with strong growth potential, especially targeted towards Egypt's growing tourism and hospitality sector, where demand for premium cuts continues to rise.
- U.S. tree nuts are a particularly strong prospect, with the United States already ranking as the second-largest supplier to Egypt with 20 percent market share. Pistachios and almonds have recently shown strong growth, driven by consumer snacking trends and the food processing sector.
- U.S. products that are not present in significant quantities but with good sales potential among more

affluent Egyptian consumers include seafood, sweets and snacks, pulses, and healthy and nutritional foods.

- U.S. apples, the largest single fresh fruit imported by Egypt, face tough competition with EU suppliers that have favorable tariffs and proximity to the market. Notably, FAS-Cairo has recently received interest from Egyptian buyers seeking U.S. apples, despite the tariff disadvantage, indicating that a market opportunity may exist among premium and specialty retailers catering to Egypt's higher-income consumers.

Section 5: Key Contacts and Further Information

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Email: info@cairochamber.org.eg ●**Error! Hyperlink reference not valid.** Website: www.cairochamber.org.eg

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Website: www.msit.gov.eg

Ministry of Investment and Foreign Trade
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Website: http://www.investment.gov.eg/

General Organization for Export and Import Control
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Egyptian Customs Authority
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General Authority for Veterinary Services
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Attachments:

No Attachments