

# HOW OMAN IS LOCALIZING, SCALING, AND REDEFINING FOOD

## FROM SUPPLY CHAIN TRANSFORMATIONS TO SHOPPER EXPECTATIONS — OMAN'S F&B RESET IS ACCELERATING

### Building Food Security — The Investment Playbook

Led by Oman Food Capital and Vision 2040, Oman is transforming its agri and food backbone with serious capital and intent.



**\$4.9BN**  
invested  
(2016–2020)



**70%**  
Food self-sufficiency  
targeted by 2040



**48%**  
already achieved



Government  
sector convergence



Private  
sector convergence



**12M** Tourists



**0.5M** Jobs  
by 2040

### Localization in Action — What's Moving, What's Missing

Some categories are charging ahead. Others still depend on imports. The gap = opportunity.

#### Category-wise Growth Opportunities



#### Fruits & Vegetables

Self-Sufficiency **70-80%**

##### Growth CAGR

**CAGR 9.1% (2021-2024)**



##### Opportunity

Scale value-added formats like pre-cut, frozen, and RTE packs

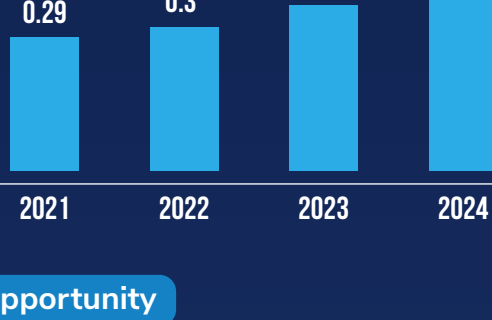


#### Dairy

Self-Sufficiency **26%**

##### Growth CAGR

**CAGR 13.1% (2021-2024)**



##### Opportunity

Launch lactose-free and fortified milk product lines

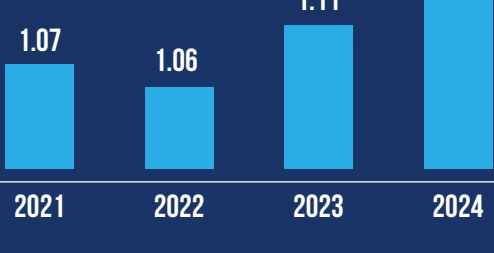


#### Bakery

Self-Sufficiency **83%**

##### Growth CAGR

**CAGR 2.4% (2021-2024)**



##### Opportunity

Expand frozen bakery offerings with whole grain and low-sugar SKUs

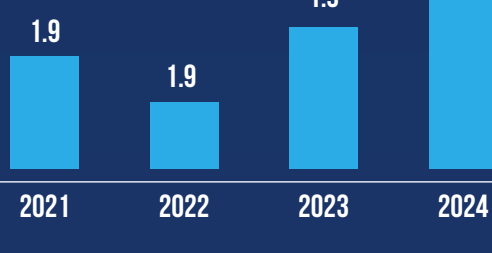


#### Cereals

Self-Sufficiency **2.2%**

##### Growth CAGR

**CAGR 1.2% (2021-2024)**



##### Opportunity

Localize cereal-based ingredient manufacturing (oats, bran, barley)

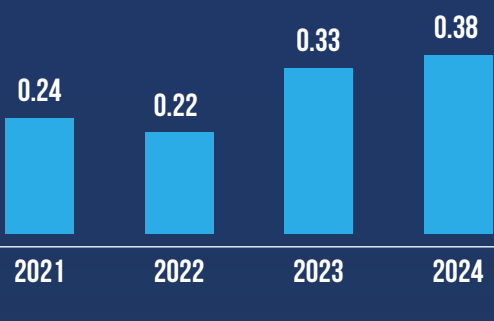


#### Protein

Self-Sufficiency **53%**

##### Growth CAGR

**CAGR 16.6% (2021-2024)**



##### Opportunity

Invest in aquaculture expansion and domestic meat processing infrastructure

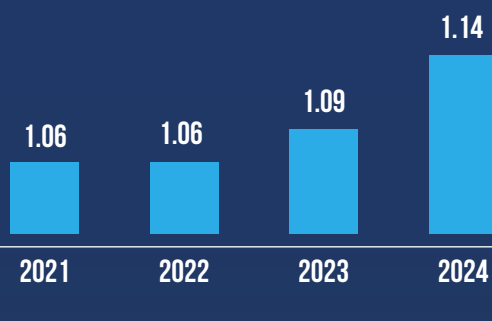


#### Beverages

Self-Sufficiency **28%**

##### Growth CAGR

**CAGR 2.3% (2021-2024)**



##### Opportunity

Tap into traditional beverage packaging (e.g., RTD Karak, Qamar el Din)

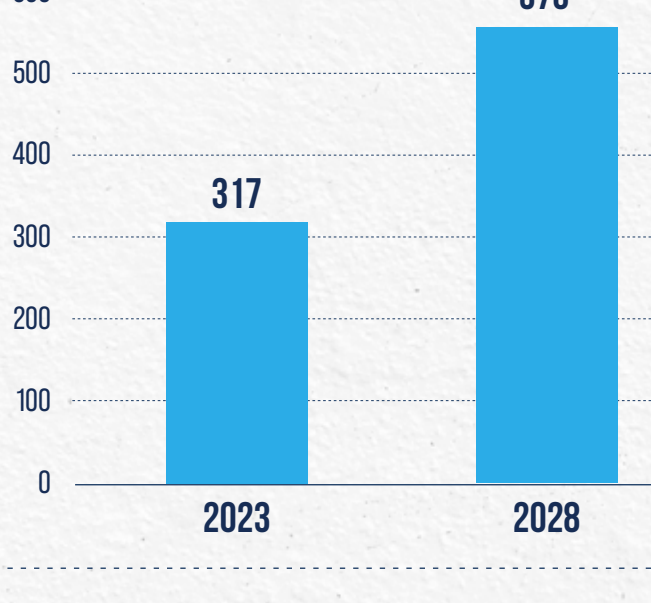
### Shopper Habits Are Changing — Fast

Retail and food services are evolving fast with millennials, digital adoption, and a hunger for variety.

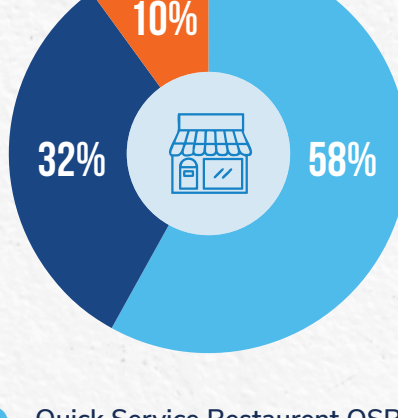


**15.8% CAGR in Food E-Comm**

**CAGR 15.8% (2023-2028)**



**Rise of FSRs over QSRs**



● Quick Service Restaurant QSR  
● Full Service Restaurant FSR  
● Cafe & Bakery Segment

#### Retail Leaders:

Lulu	Mars International	SPAR	Carrefour	Fathima Group
25 Hypermarkets	20 Hypermarkets	23 Supermarkets	9 Hypermarkets	4 Supermarkets

### Bridging the Gap — What the Future Needs

Strategic whitespace exists in cereals, dairy, cold chain, ingredients, and private labels.

Investment needed in

- ✓ Processing
- ✓ Infrastructure
- ✓ Traceability



Let's Bridge the Gap — and Localize for Growth

Whether you're entering Oman's F&B market or scaling up local production, our growth experts can help you identify the right opportunity, partner, or go-to-market path.

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