



Euromonitor  
International

# Alcoholic Drinks in Saudi Arabia

June 2025

Table of Contents

EXECUTIVE SUMMARY

- Alcoholic drinks in 2024: The big picture
- 2024 key trends
- Competitive landscape
- Retail developments
- On-trade vs off-trade split
- What next for alcoholic drinks?

MARKET BACKGROUND

- Legislation
- Legal purchasing age and legal drinking age
- Advertising
- Smoking ban
- Opening hours
- On-trade establishments

TAXATION AND DUTY LEVIES

OPERATING ENVIRONMENT

- Contraband/parallel trade
- Duty free
- Cross-border/private imports

KEY NEW PRODUCT LAUNCHES

- Outlook

MARKET INDICATORS

Table 1 - Retail Consumer Expenditure on Alcoholic Drinks 2019-2024

MARKET DATA

- Table 2 - Sales of Alcoholic Drinks by Category: Total Volume 2019-2024
- Table 3 - Sales of Alcoholic Drinks by Category: Total Value 2019-2024
- Table 4 - Sales of Alcoholic Drinks by Category: % Total Volume Growth 2019-2024
- Table 5 - Sales of Alcoholic Drinks by Category: % Total Value Growth 2019-2024
- Table 6 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2024
- Table 7 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2024
- Table 8 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2024
- Table 9 - GBO Company Shares of Alcoholic Drinks: % Total Volume 2020-2024
- Table 10 - Distribution of Alcoholic Drinks by Format: % Off-trade Value 2019-2024
- Table 11 - Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2024
- Table 12 - Forecast Sales of Alcoholic Drinks by Category: Total Volume 2024-2029
- Table 13 - Forecast Sales of Alcoholic Drinks by Category: Total Value 2024-2029
- Table 14 - Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2024-2029
- Table 15 - Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2024-2029

DISCLAIMER

SOURCES

- Summary 1 - Research Sources

KEY DATA FINDINGS

## 2024 DEVELOPMENTS

Non-alcoholic beer sales based on seasonality and socially-driven demand

Established brands maintain their popularity, while Heineken sees particularly dynamic growth

Supermarkets and hypermarkets remain the most relevant, as small local grocers lose share and e-commerce grows

## PROSPECTS AND OPPORTUNITIES

Moderate growth of non-alcoholic beer expected, driven by social gatherings and sporting events

Supermarket and hypermarkets will remain key growth drivers for sales of non-alcoholic beer

Innovation will remain focussed on flavour, health-based options, and premium-style packaging

## CATEGORY BACKGROUND

Lager price band methodology

Summary 2 - Lager by Price Band 2024

## CATEGORY DATA

Table 16 - Sales of Beer by Category: Total Volume 2019-2024

Table 17 - Sales of Beer by Category: Total Value 2019-2024

Table 18 - Sales of Beer by Category: % Total Volume Growth 2019-2024

Table 19 - Sales of Beer by Category: % Total Value Growth 2019-2024

Table 20 - Sales of Beer by Off-trade vs On-trade: Volume 2019-2024

Table 21 - Sales of Beer by Off-trade vs On-trade: Value 2019-2024

Table 22 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2019-2024

Table 23 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2019-2024

Table 24 - Sales of Beer by Craft vs Standard 2019-2024

Table 25 - GBO Company Shares of Beer: % Total Volume 2020-2024

Table 26 - NBO Company Shares of Beer: % Total Volume 2020-2024

Table 27 - LBN Brand Shares of Beer: % Total Volume 2021-2024

Table 28 - Forecast Sales of Beer by Category: Total Volume 2024-2029

Table 29 - Forecast Sales of Beer by Category: Total Value 2024-2029

Table 30 - Forecast Sales of Beer by Category: % Total Volume Growth 2024-2029

Table 31 - Forecast Sales of Beer by Category: % Total Value Growth 2024-2029

## Wine in Saudi Arabia

## KEY DATA FINDINGS

## 2024 DEVELOPMENTS

Non-alcoholic wine continues to develop in Saudi Arabia

Shares divided between two main players and smaller brands, with innovation focussing on premiumisation

Supermarkets lead off-trade sales of non-alcoholic wine

## PROSPECTS AND OPPORTUNITIES

Healthy ongoing growth expected for non-alcoholic wine

Variety expansion and growing availability will help to support sales

Innovation will focus on premiumisation and building consumer trust

## CATEGORY DATA

Table 32 - Sales of Wine by Category: Total Volume 2019-2024

Table 33 - Sales of Wine by Category: Total Value 2019-2024

Table 34 - Sales of Wine by Category: % Total Volume Growth 2019-2024

Table 35 - Sales of Wine by Category: % Total Value Growth 2019-2024

Table 36 - Sales of Wine by Off-trade vs On-trade: Volume 2019-2024

Table 37 - Sales of Wine by Off-trade vs On-trade: Value 2019-2024

Table 38 - Sales of Wine by Off-trade vs On-trade: % Volume Growth 2019-2024

Table 39 - Sales of Wine by Off-trade vs On-trade: % Value Growth 2019-2024

Table 40 - Sales of Still Red Wine by Price Segment: % Off-trade Volume 2019-2024

Table 41 - Sales of Still Rosé Wine by Price Segment: % Off-trade Volume 2019-2024

Table 42 - Sales of Still White Wine by Price Segment: % Off-trade Volume 2019-2024

Table 43 - Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2019-2024

Table 44 - GBO Company Shares of Still Light Grape Wine: % Total Volume 2020-2024

Table 45 - NBO Company Shares of Still Light Grape Wine: % Total Volume 2020-2024

Table 46 - LBN Brand Shares of Still Light Grape Wine: % Total Volume 2021-2024

Table 47 - GBO Company Shares of Champagne: % Total Volume 2020-2024

Table 48 - NBO Company Shares of Champagne: % Total Volume 2020-2024

Table 49 - LBN Brand Shares of Champagne: % Total Volume 2021-2024

Table 50 - GBO Company Shares of Other Sparkling Wine: % Total Volume 2020-2024

Table 51 - NBO Company Shares of Other Sparkling Wine: % Total Volume 2020-2024

Table 52 - LBN Brand Shares of Other Sparkling Wine: % Total Volume 2021-2024

Table 53 - GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2020-2024

Table 54 - NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2020-2024

Table 55 - LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2021-2024

Table 56 - GBO Company Shares of Non-grape Wine: % Total Volume 2020-2024

Table 57 - NBO Company Shares of Non-grape Wine: % Total Volume 2020-2024

Table 58 - LBN Brand Shares of Non-grape Wine: % Total Volume 2021-2024

Table 59 - Forecast Sales of Wine by Category: Total Volume 2024-2029

Table 60 - Forecast Sales of Wine by Category: Total Value 2024-2029

Table 61 - Forecast Sales of Wine by Category: % Total Volume Growth 2024-2029

Table 62 - Forecast Sales of Wine by Category: % Total Value Growth 2024-2029

## 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/alcoholic-drinks-in-saudi-arabia/report](https://www.euromonitor.com/alcoholic-drinks-in-saudi-arabia/report).