



Euromonitor
International

Snacks in Saudi Arabia

June 2024

Table of Contents

Snacks in Saudi Arabia

EXECUTIVE SUMMARY

Snacks in 2024: The big picture

Key trends in 2024

Competitive landscape

Channel developments

What next for snacks?

MARKET DATA

Table 1 - Sales of Snacks by Category: Volume 2019-2024

Table 2 - Sales of Snacks by Category: Value 2019-2024

Table 3 - Sales of Snacks by Category: % Volume Growth 2019-2024

Table 4 - Sales of Snacks by Category: % Value Growth 2019-2024

Table 5 - NBO Company Shares of Snacks: % Value 2020-2024

Table 6 - LBN Brand Shares of Snacks: % Value 2021-2024

Table 7 - Penetration of Private Label by Category: % Value 2019-2024

Table 8 - Distribution of Snacks by Format: % Value 2019-2024

Table 9 - Forecast Sales of Snacks by Category: Volume 2024-2029

Table 10 - Forecast Sales of Snacks by Category: Value 2024-2029

Table 11 - Forecast Sales of Snacks by Category: % Volume Growth 2024-2029

Table 12 - Forecast Sales of Snacks by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Chocolate Confectionery in Saudi Arabia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Chocolate confectionery shows modest growth, with boxed assortments leading the way

Growing health consciousness presents significant challenge

E-commerce continues to expand, albeit from a low base

PROSPECTS AND OPPORTUNITIES

Growing health concerns will shape the market for chocolate confectionery

More business opportunities for local companies

Discounters set to gain further penetration within chocolate confectionery

CATEGORY DATA

Summary 2 - Other Chocolate Confectionery by Product Type: 2024

Table 13 - Sales of Chocolate Confectionery by Category: Volume 2019-2024

Table 14 - Sales of Chocolate Confectionery by Category: Value 2019-2024

Table 15 - Sales of Chocolate Confectionery by Category: % Volume Growth 2019-2024

Table 16 - Sales of Chocolate Confectionery by Category: % Value Growth 2019-2024

Table 17 - Sales of Chocolate Tablets by Type: % Value 2019-2024

Table 18 - NBO Company Shares of Chocolate Confectionery: % Value 2020-2024

Table 19 - LBN Brand Shares of Chocolate Confectionery: % Value 2021-2024

Table 20 - Distribution of Chocolate Confectionery by Format: % Value 2019-2024

Table 21 - Forecast Sales of Chocolate Confectionery by Category: Volume 2024-2029

Table 22 - Forecast Sales of Chocolate Confectionery by Category: Value 2024-2029

Table 23 - Forecast Sales of Chocolate Confectionery by Category: % Volume Growth 2024-2029

Table 24 - Forecast Sales of Chocolate Confectionery by Category: % Value Growth 2024-2029

Gum in Saudi Arabia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Return to normality supports gum sales, with health-oriented options seeing an increase in demand

Gum remains a highly consolidated competitive landscape

Discounters become more important in distribution of gum

PROSPECTS AND OPPORTUNITIES

Return to pre-pandemic lifestyles will support early recovery for retail volume sales

Health and wellness trends will drive innovation in the market

Demand for sustainable gum will increase

CATEGORY DATA

Table 25 - Sales of Gum by Category: Volume 2019-2024

Table 26 - Sales of Gum by Category: Value 2019-2024

Table 27 - Sales of Gum by Category: % Volume Growth 2019-2024

Table 28 - Sales of Gum by Category: % Value Growth 2019-2024

Table 29 - Sales of Gum by Flavour: Rankings 2019-2024

Table 30 - NBO Company Shares of Gum: % Value 2020-2024

Table 31 - LBN Brand Shares of Gum: % Value 2021-2024

Table 32 - Distribution of Gum by Format: % Value 2019-2024

Table 33 - Forecast Sales of Gum by Category: Volume 2024-2029

Table 34 - Forecast Sales of Gum by Category: Value 2024-2029

Table 35 - Forecast Sales of Gum by Category: % Volume Growth 2024-2029

Table 36 - Forecast Sales of Gum by Category: % Value Growth 2024-2029

Sugar Confectionery in Saudi Arabia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Healthy growth for sugar confectionery

Health and wellness trends continue to impact the market

Local players hold sway

PROSPECTS AND OPPORTUNITIES

Positive outlook expected, but must remain mindful of rising health and wellness concerns

Haribo looks to achieve greater penetration in the Saudi gummies market

Small local grocers will remain important for distribution of sugar confectionery, although e-commerce will gain ground, thanks to attractive price deals and promotions

CATEGORY DATA

Summary 3 - Other Sugar Confectionery by Product Type: 2024

Table 37 - Sales of Sugar Confectionery by Category: Volume 2019-2024

Table 38 - Sales of Sugar Confectionery by Category: Value 2019-2024

Table 39 - Sales of Sugar Confectionery by Category: % Volume Growth 2019-2024

Table 40 - Sales of Sugar Confectionery by Category: % Value Growth 2019-2024

Table 41 - Sales of Pastilles, Gummies, Jellies and Chews by Type: % Value 2019-2024

Table 42 - NBO Company Shares of Sugar Confectionery: % Value 2020-2024

- Table 43 - LBN Brand Shares of Sugar Confectionery: % Value 2021-2024
- Table 44 - Distribution of Sugar Confectionery by Format: % Value 2019-2024
- Table 45 - Forecast Sales of Sugar Confectionery by Category: Volume 2024-2029
- Table 46 - Forecast Sales of Sugar Confectionery by Category: Value 2024-2029
- Table 47 - Forecast Sales of Sugar Confectionery by Category: % Volume Growth 2024-2029
- Table 48 - Forecast Sales of Sugar Confectionery by Category: % Value Growth 2024-2029

Ice Cream in Saudi Arabia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Continued healthy growth for ice cream in 2024
- Health and wellness trend gains momentum, although frozen yoghurt is unable to benefit fully, due to availability issues
- Modern grocery retailers dominate sales of take-home ice cream

PROSPECTS AND OPPORTUNITIES

- Health and wellness trend will have significant impact on the ice cream market
- "Made In Saudi" initiative will provide boost to domestic production
- Almarai likely to emerge as prominent ice cream player

CATEGORY DATA

- Table 49 - Sales of Ice Cream by Category: Volume 2019-2024
- Table 50 - Sales of Ice Cream by Category: Value 2019-2024
- Table 51 - Sales of Ice Cream by Category: % Volume Growth 2019-2024
- Table 52 - Sales of Ice Cream by Category: % Value Growth 2019-2024
- Table 53 - Sales of Ice Cream by Leading Flavours: Rankings 2019-2024
- Table 54 - Sales of Impulse Ice Cream by Format: % Value 2019-2024
- Table 55 - NBO Company Shares of Ice Cream: % Value 2020-2024
- Table 56 - LBN Brand Shares of Ice Cream: % Value 2021-2024
- Table 57 - NBO Company Shares of Impulse Ice Cream: % Value 2020-2024
- Table 58 - LBN Brand Shares of Impulse Ice Cream: % Value 2021-2024
- Table 59 - NBO Company Shares of Take-home Ice Cream: % Value 2020-2024
- Table 60 - LBN Brand Shares of Take-home Ice Cream: % Value 2021-2024
- Table 61 - Distribution of Ice Cream by Format: % Value 2019-2024
- Table 62 - Forecast Sales of Ice Cream by Category: Volume 2024-2029
- Table 63 - Forecast Sales of Ice Cream by Category: Value 2024-2029
- Table 64 - Forecast Sales of Ice Cream by Category: % Volume Growth 2024-2029
- Table 65 - Forecast Sales of Ice Cream by Category: % Value Growth 2024-2029

Savoury Snacks in Saudi Arabia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Savoury snacks continue to register a robust performance
- Indulgence and health are equally important growth drivers
- E-commerce continues its upward trajectory

PROSPECTS AND OPPORTUNITIES

- Saudi Arabia is increasingly promising market for investors
- Growing demand for healthy savoury snacks
- Shrinkflation increasing phenomenon

CATEGORY DATA

Summary 4 - Other Savoury Snacks by Product Type: 2024

Table 66 - Sales of Savoury Snacks by Category: Volume 2019-2024

Table 67 - Sales of Savoury Snacks by Category: Value 2019-2024

Table 68 - Sales of Savoury Snacks by Category: % Volume Growth 2019-2024

Table 69 - Sales of Savoury Snacks by Category: % Value Growth 2019-2024

Table 70 - NBO Company Shares of Savoury Snacks: % Value 2020-2024

Table 71 - LBN Brand Shares of Savoury Snacks: % Value 2021-2024

Table 72 - Distribution of Savoury Snacks by Format: % Value 2019-2024

Table 73 - Forecast Sales of Savoury Snacks by Category: Volume 2024-2029

Table 74 - Forecast Sales of Savoury Snacks by Category: Value 2024-2029

Table 75 - Forecast Sales of Savoury Snacks by Category: % Volume Growth 2024-2029

Table 76 - Forecast Sales of Savoury Snacks by Category: % Value Growth 2024-2029

Sweet Biscuits, Snack Bars and Fruit Snacks in Saudi Arabia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Strong performance expected in 2024

Sweet biscuits, dried fruit and snack bars are seen as convenient sources of carbohydrates

Health and wellness trends increasingly shape the market

PROSPECTS AND OPPORTUNITIES

New product development will drive growth, as Saudi government looks to attract further investment

Health and wellness trends will impact sales, with greater use of gyms and fitness centres expected to boost consumption of snack bars

Promotional activities will continue as a means of attracting budget-conscious consumers

CATEGORY DATA

Table 77 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2019-2024

Table 78 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2019-2024

Table 79 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2019-2024

Table 80 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2019-2024

Table 81 - NBO Company Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2020-2024

Table 82 - LBN Brand Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2021-2024

Table 83 - NBO Company Shares of Sweet Biscuits: % Value 2020-2024

Table 84 - LBN Brand Shares of Sweet Biscuits: % Value 2021-2024

Table 85 - NBO Company Shares of Snack Bars: % Value 2020-2024

Table 86 - LBN Brand Shares of Snack Bars: % Value 2021-2024

Table 87 - NBO Company Shares of Fruit Snacks: % Value 2020-2024

Table 88 - LBN Brand Shares of Fruit Snacks: % Value 2021-2024

Table 89 - Distribution of Sweet Biscuits, Snack Bars and Fruit Snacks by Format: % Value 2019-2024

Table 90 - Distribution of Sweet Biscuits by Format: % Value 2019-2024

Table 91 - Distribution of Snack Bars by Format: % Value 2019-2024

Table 92 - Distribution of Fruit Snacks by Format: % Value 2019-2024

Table 93 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2024-2029

Table 94 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2024-2029

Table 95 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2024-2029

Table 96 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % 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/snacks-in-saudi-arabia/report.