

Beer in Saudi Arabia

July 2022

Table of Contents

KEY DATA FINDINGS

2021 DEVELOPMENTS

Easing of restrictions benefits sales of non alcoholic beer but challenges remain

Hypermarkets and supermarkets continue to gain share but e-commerce also offers promise

Flavour and price the two major considerations in the purchasing process

PROSPECTS AND OPPORTUNITIES

Healthier options and affordable prices key trends to look out for in non alcoholic beer

Social gatherings remain key to consumption

As global demand for non alcoholic beer grows so too could the competition in Saudi Arabia

CATEGORY BACKGROUND

Lager price band methodology

Summary 1 - Lager by Price Band 2021

CATEGORY DATA

Table 1 - Sales of Beer by Category: Total Volume 2016-2021

Table 2 - Sales of Beer by Category: Total Value 2016-2021

Table 3 - Sales of Beer by Category: % Total Volume Growth 2016-2021

Table 4 - Sales of Beer by Category: % Total Value Growth 2016-2021

Table 5 - Sales of Beer by Off-trade vs On-trade: Volume 2016-2021

Table 6 - Sales of Beer by Off-trade vs On-trade: Value 2016-2021

Table 7 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2016-2021

Table 8 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2016-2021

Table 9 - GBO Company Shares of Beer: % Total Volume 2017-2021

Table 10 - NBO Company Shares of Beer: % Total Volume 2017-2021

Table 11 - LBN Brand Shares of Beer: % Total Volume 2018-2021

Table 12 - Forecast Sales of Beer by Category: Total Volume 2021-2026

Table 13 - Forecast Sales of Beer by Category: Total Value 2021-2026

Table 14 - Forecast Sales of Beer by Category: % Total Volume Growth 2021-2026

Table 15 - Forecast Sales of Beer by Category: % Total Value Growth 2021-2026

Alcoholic Drinks in Saudi Arabia - Industry Overview

EXECUTIVE SUMMARY

Alcoholic drinks in 2021: The big picture

2021 key trends

Competitive landscape

Retailing developments

On-trade vs off-trade split

What next for alcoholic drinks?

Chart 1 - Alcoholic Drinks Off-Trade Volume Sales Growth Scenarios: 2019-2026

Chart 2 - Alcoholic Drinks On-Trade Volume Sales Growth Scenarios: 2019-2026

Chart 3 - Alcoholic Drinks Impact of Soft Drivers on Off-Trade Volume Sales: 2019-2026

Chart 4 - Alcoholic Drinks Impact of Soft Drivers on On-Trade Volume Sales: 2019-2026

MARKET BACKGROUND

Legislation

Advertising

Smoking ban

Opening hours

On-trade establishments

Summary 2 - Number of On-trade Establishments by Type 2015-2021

TAXATION AND DUTY LEVIES

Summary 3 - Taxation and Duty Levies on Alcoholic Drinks 2021

OPERATING ENVIRONMENT

Contraband/parallel trade

Duty free

Cross-border/private imports

KEY NEW PRODUCT LAUNCHES

Outlook

MARKET INDICATORS

Table 16 - Retail Consumer Expenditure on Alcoholic Drinks 2016-2021

MARKET DATA

Table 17 - Sales of Alcoholic Drinks by Category: Total Volume 2016-2021

Table 18 - Sales of Alcoholic Drinks by Category: Total Value 2016-2021

Table 19 - Sales of Alcoholic Drinks by Category: % Total Volume Growth 2016-2021

Table 20 - Sales of Alcoholic Drinks by Category: % Total Value Growth 2016-2021

Table 21 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2021

Table 22 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2021

Table 23 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2021

Table 24 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2021

Table 25 - GBO Company Shares of Alcoholic Drinks: % Total Volume 2017-2021

Table 26 - Distribution of Alcoholic Drinks by Format: % Off-trade Value 2016-2021

Table 27 - Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2021

Table 28 - Forecast Sales of Alcoholic Drinks by Category: Total Volume 2021-2026

Table 29 - Forecast Sales of Alcoholic Drinks by Category: Total Value 2021-2026

Table 30 - Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2021-2026

Table 31 - Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2021-2026

DISCLAIMER

SOURCES

Summary 4 - Research Sources

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/beer-in-saudi-arabia/report.