

Bottled Water in the Middle East and Africa

September 2020

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Scope

Key findings

REGIONAL OVERVIEW

Dynamic growth in Middle East and Africa

Growth rises in 2020 due to stockpiling

Still bottled water an essential in Nigeria

High growth in Cameroon but Nigeria dominates

Still bottled water far greater than other categories

Major consumption demand in Nigeria and Ghana

Independent small grocers remain key as traditional outlets predominate

Traditional retail remains key; e-commerce also rising

LEADING COMPANIES AND BRANDS

National markets typically concentrated in the hands of the few

Nestlé and The Coca-Cola Co lead

Domestic players focus on local market; wide presence for Coca-Cola Co

Declines for Hana, Nova and Dasani

FORECAST PROJECTIONS

Climate, water problems and population growth to drive demand

Nigeria, Tunisia, Morocco and Saudi Arabia to see highest volume gains

Positive environment for growth across the region

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Algeria: Competitive and Retail Landscape

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Cameroon: Competitive and Retail Landscape

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Tunisia: Competitive and Retail Landscape

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United Arab Emirates: Competitive and Retail Landscape

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Growth decomposition explained

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