



Carbonates in Saudi Arabia

November 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Off-trade volume sales continue to rise, with sugar reduction a notable trend

INDUSTRY PERFORMANCE

Hot climate, young consumer base, and demand for refreshment continue to drive growth
Reduced sugar carbonates sees more dynamic growth than regular, from a low base
Saudi consumers continue to appreciate citrus flavour drinks for refreshment

WHAT'S NEXT?

Rise in tourism and sugar reduction likely to contribute to a further rise in sales
Sustainability likely to come to the fore, but taste will be the most important factor
Brands will focus their attention on local tastes to maintain consumer interest

COMPETITIVE LANDSCAPE

PepsiCo maintains its lead through various initiatives
Growth of local carbonates brands supported by "Made in Saudi", but challenges remain

CHANNELS

Supermarkets continues to lead the distribution of carbonates in Saudi Arabia
Digital retail channels are on the rise, driving growth for retail e-commerce

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