

FMCG State of Nation KSA & UAE

eCommerce, Modern Trade, Traditional Trade

Period: June 2026 Data Ending

NielsenIQ



eCommerce

Period: June 2026 Data Ending



Key Takeaways



In the last 3 months, KSA Ecom managed to grow strong double digit at +52% while UAE continued to grow with a slower pace at +17%



In both markets, the average price decline rate slowed down



In terms of value, Ambient Food is the fastest growing basket in KSA while it is Snacking in UAE



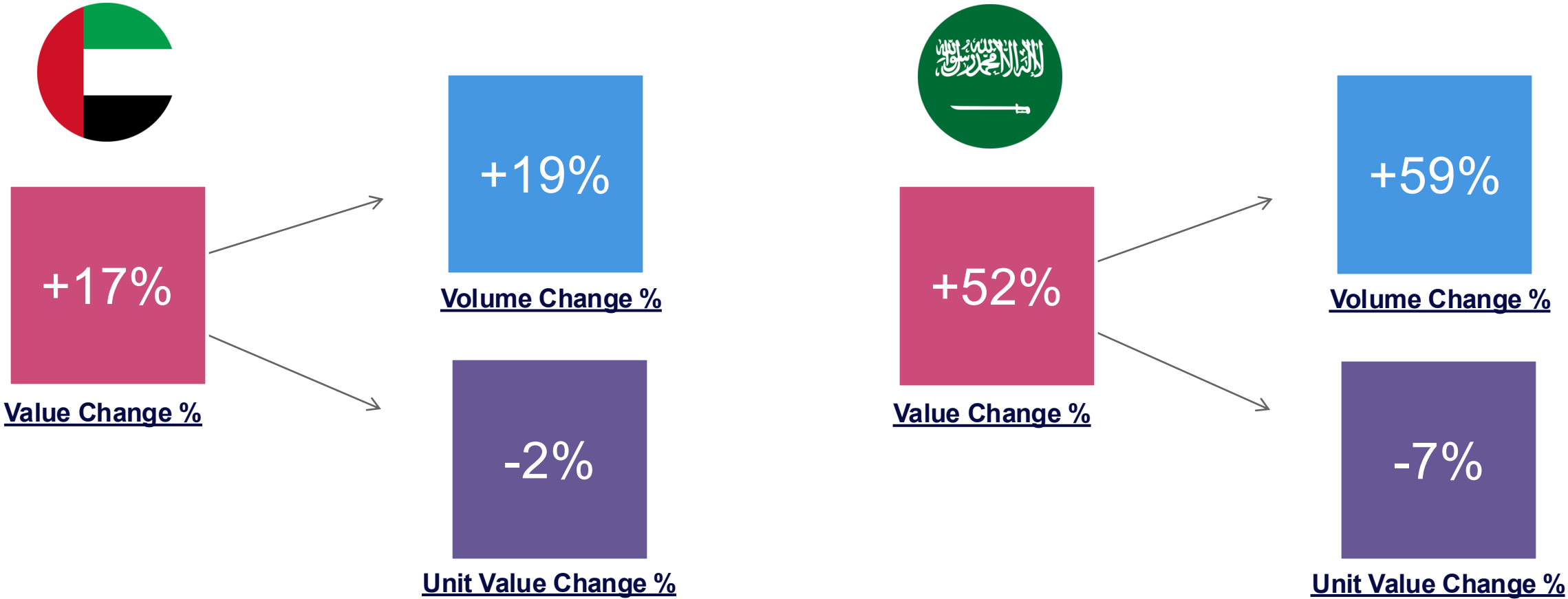
In KSA, there is a balanced view for Food while mid tier brands are performing best for Non-Food. While in UAE, smaller players outperformed others in Food



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eCommerce

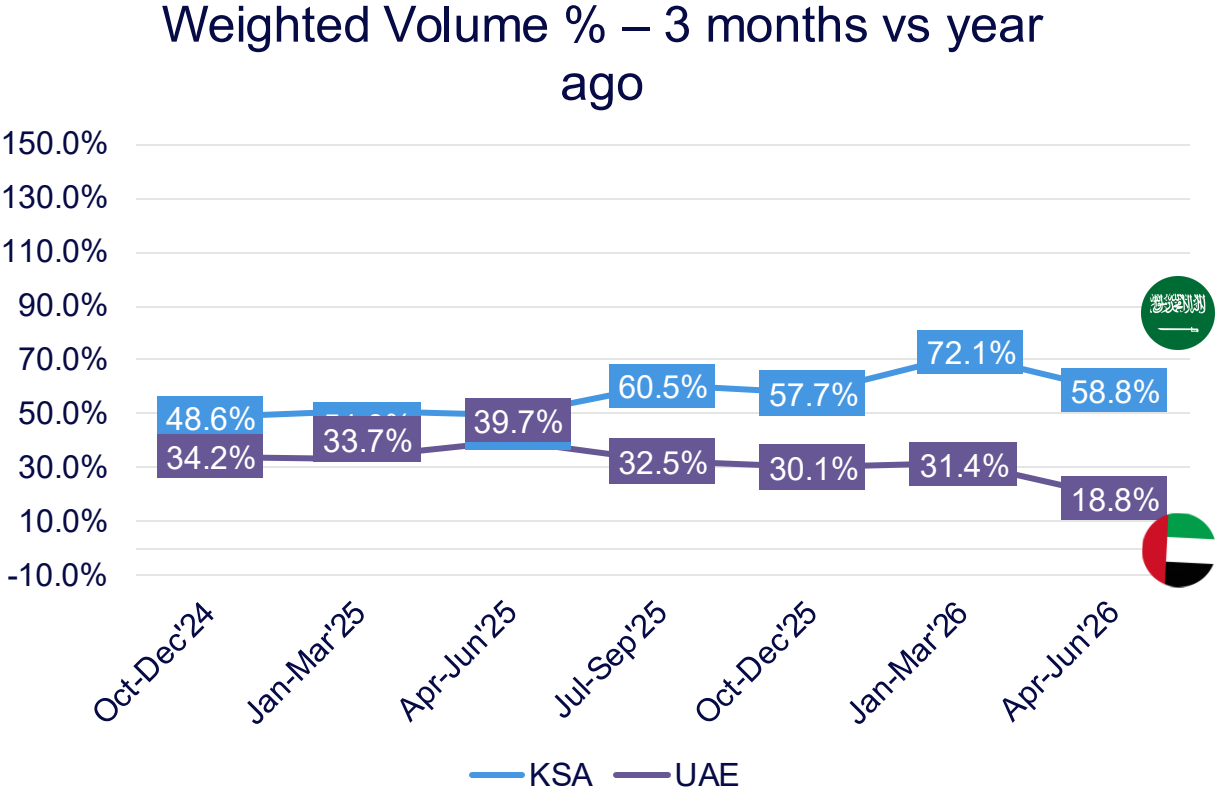
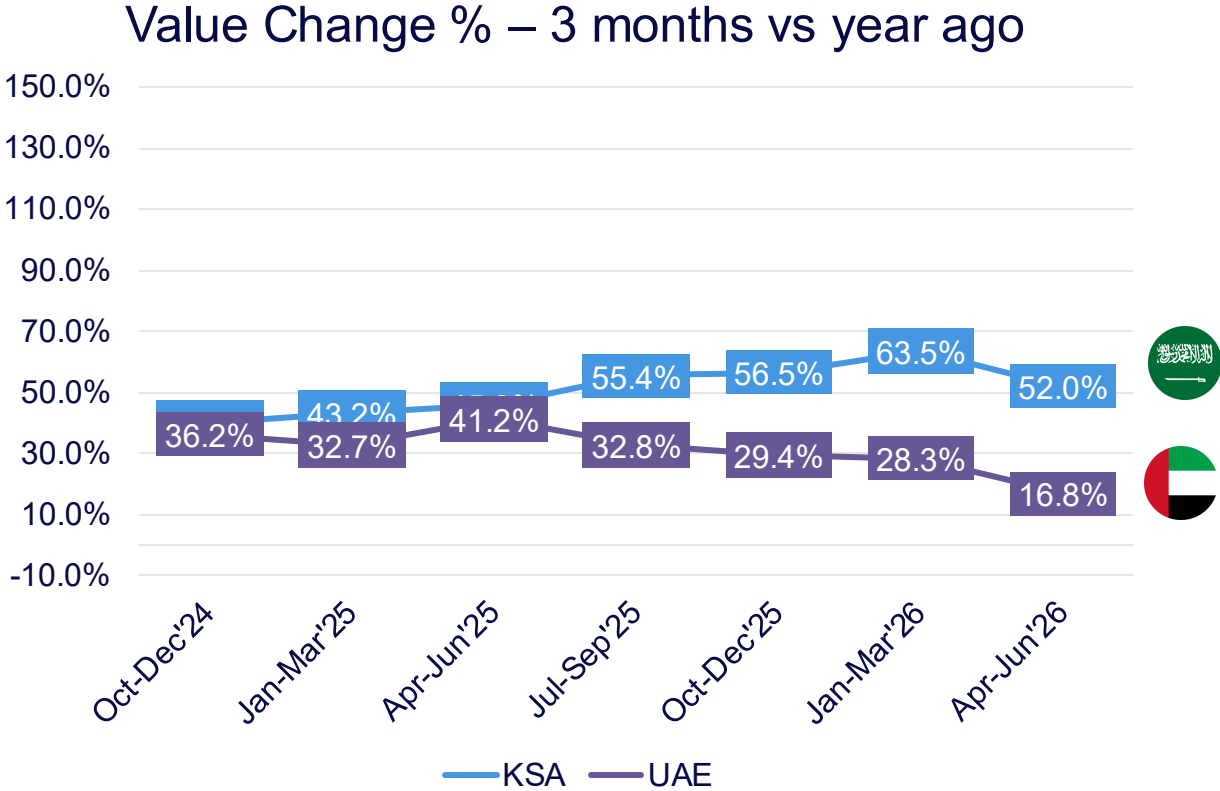
FMCG Trends - Last 3 months vs year ago



Source : NielsenIQ RMS

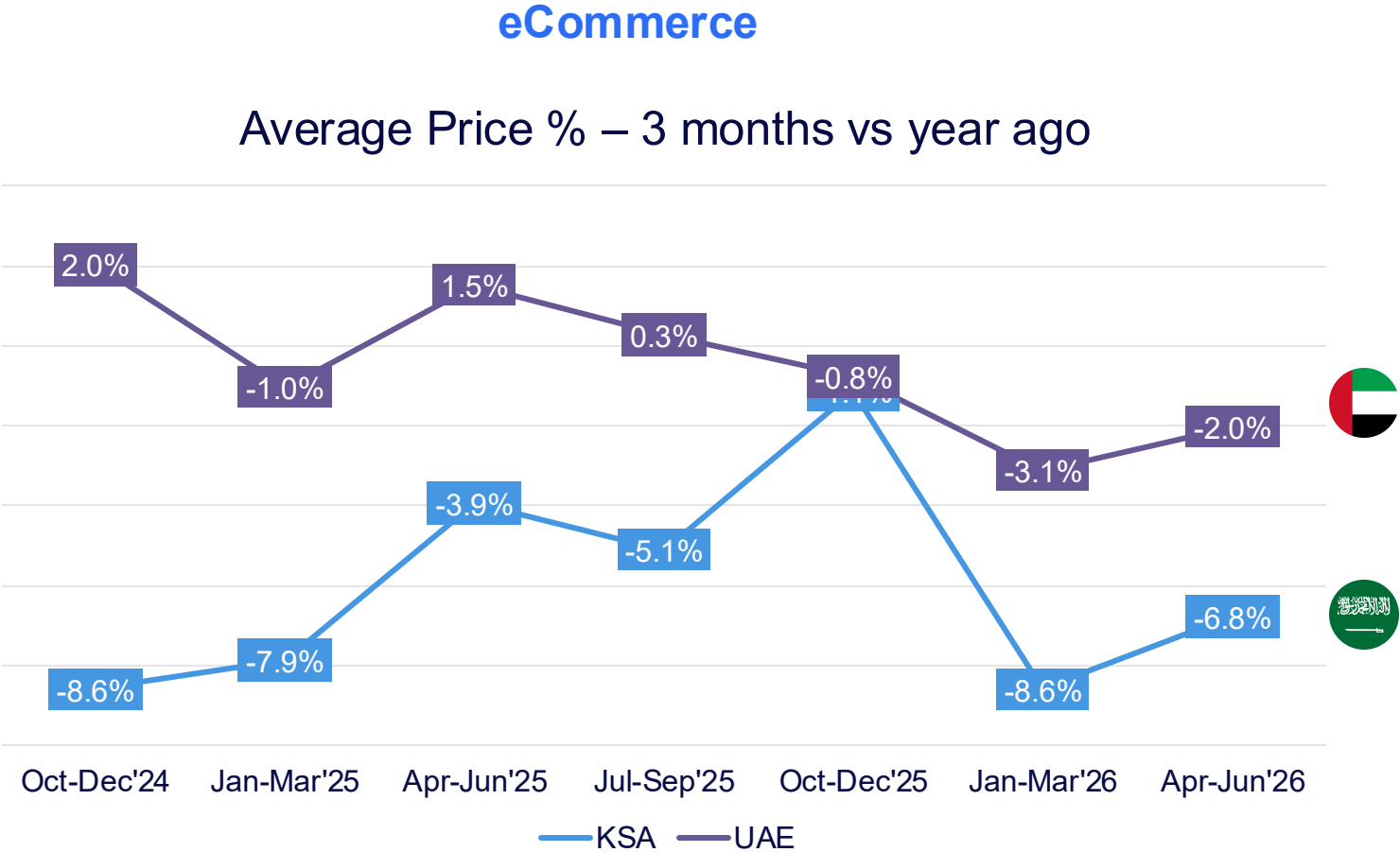
Despite the challenging situation, UAE Ecom stayed at double digit growth whereas KSA is more or less at a similar pace

eCommerce



Source : NielsenIQ RMS

In both markets, the average price decline rate slowed down



Source : NielsenIQ RMS

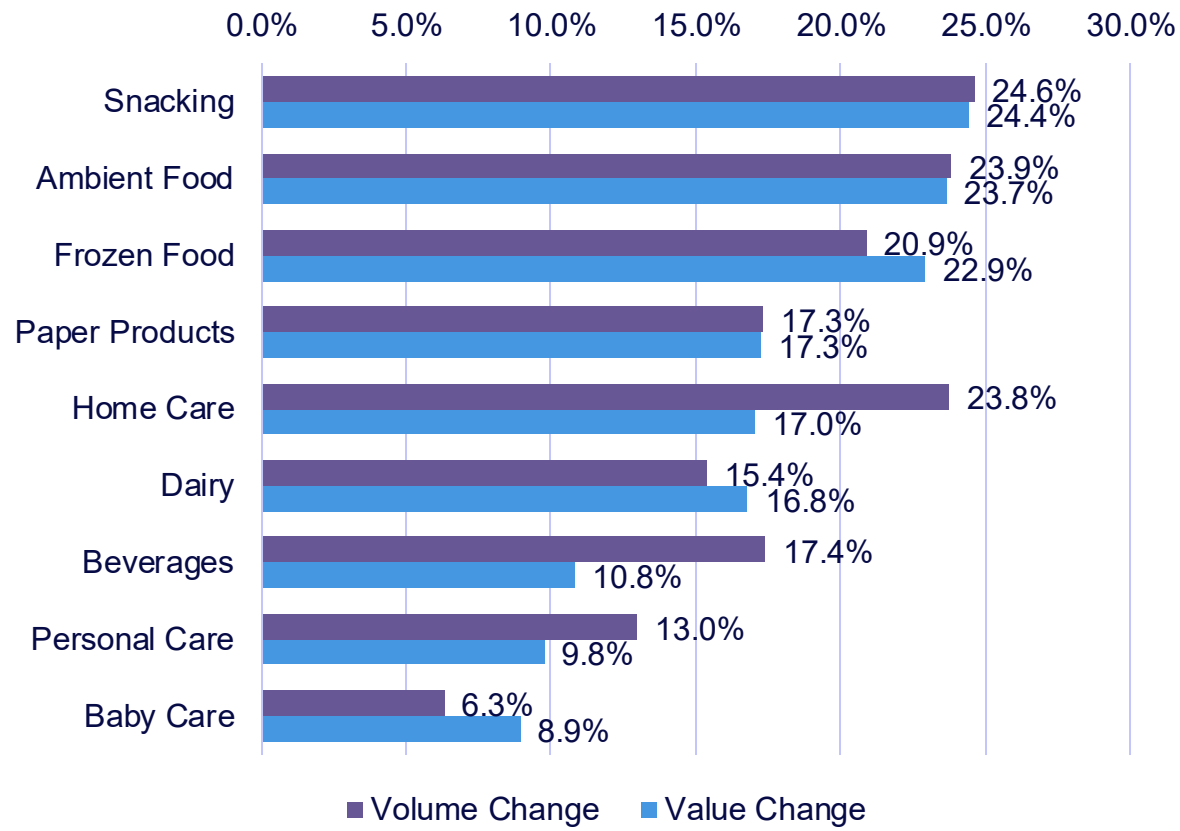
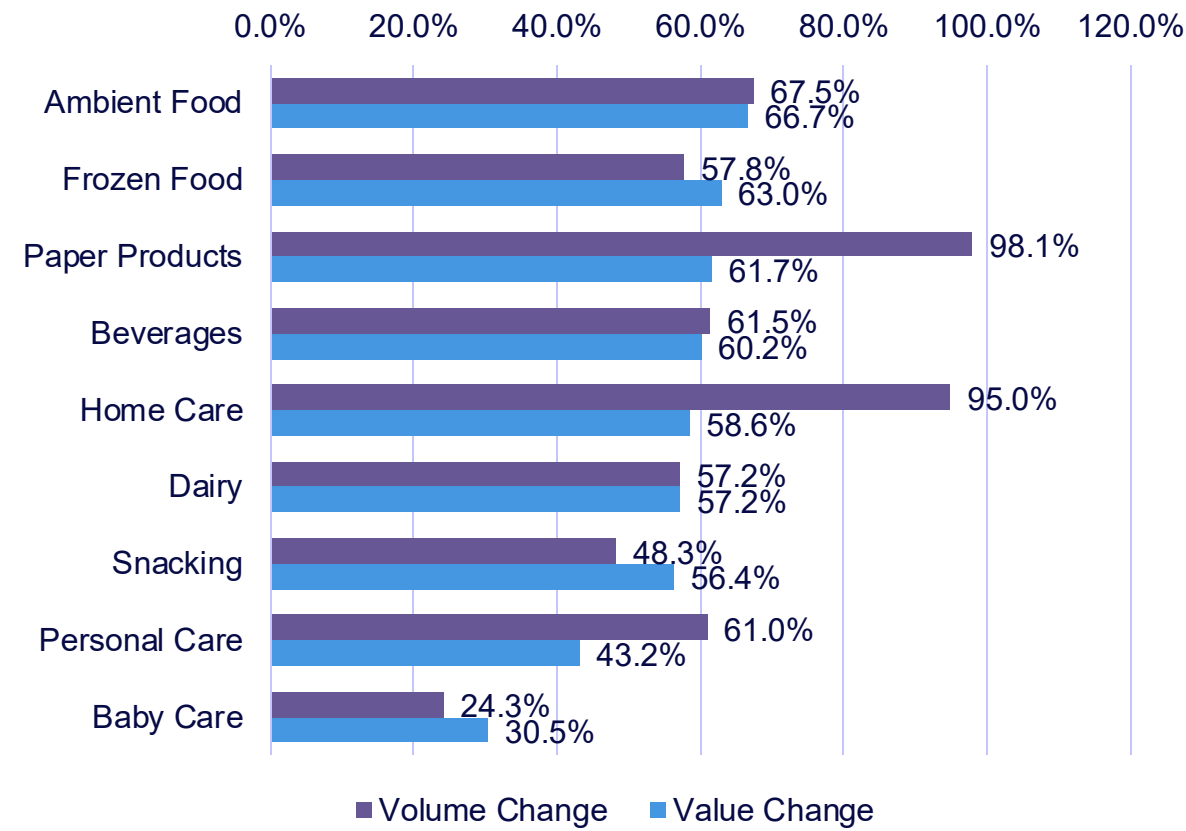
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eCommerce



Value & Volume Change % - Last 3M vs year ago

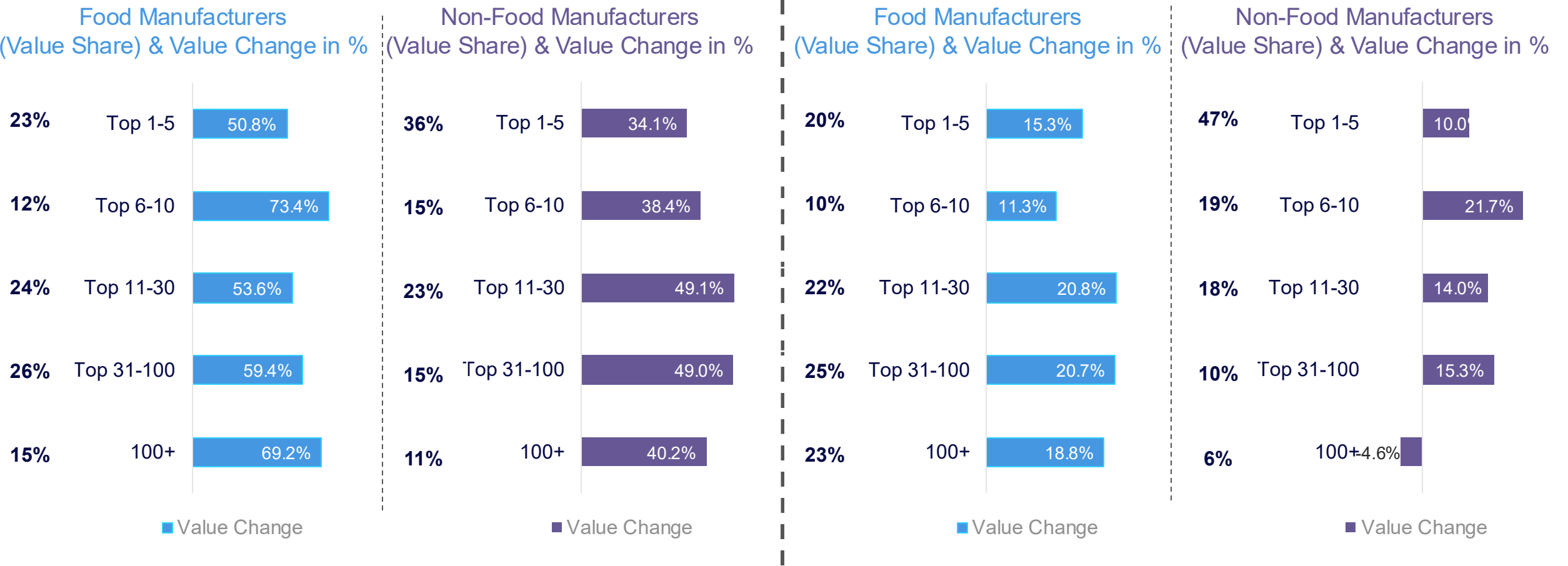


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eCommerce
Last 3M vs year ago



Source : NielsenIQ RMS

NIQ's Digital Commerce Suite gives you *the Full View*TM

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[Know how!](#)

What is happening

What consumers search, click & buy.

Why it's happening

Tie online causals to purchase.

What to do about it

Optimize availability, spend & assortment for every item & shelf.

Modern Trade (Hyper/Super, Self Service, Pharmacy)

Period: June 2026 Data Ending



Key Takeaways



Modern Trade trend is the same for both markets in terms of value at -4% and volume -6%



In both markets, average price change has increased; both markets are at +2%



In terms of value, Snacking is the only growing basket in KSA while fastest growing basket is Frozen Food in UAE



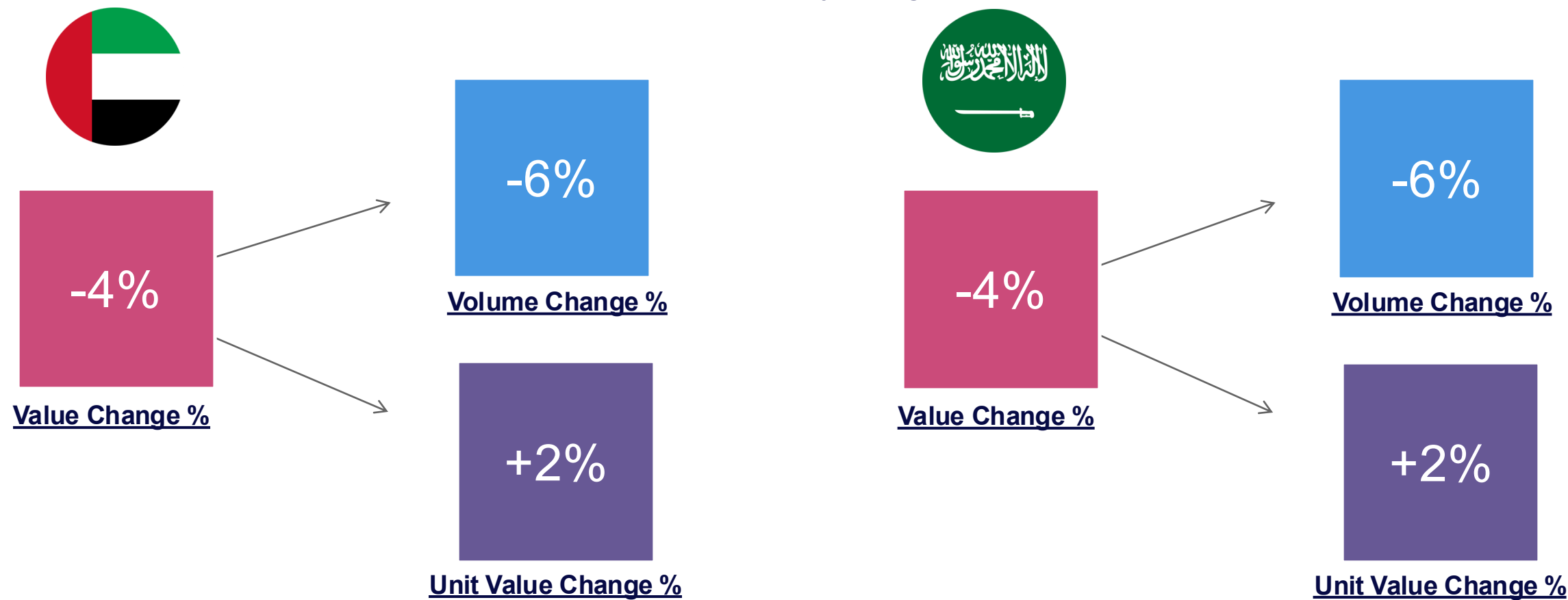
Smaller players are performing better vs top players in KSA while the mid tier is the best performing for UAE



Modern Trade trend is the same for both markets in terms of value at -4% and volume -6%

Modern Trade

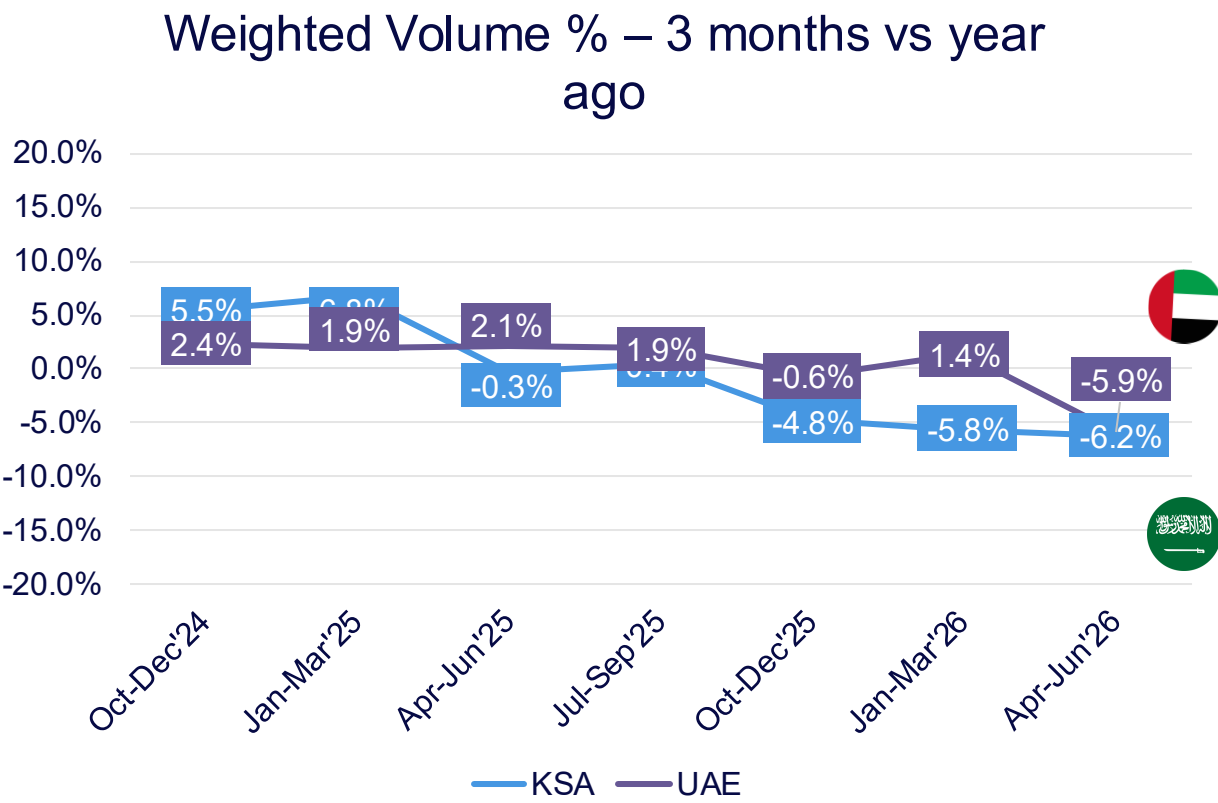
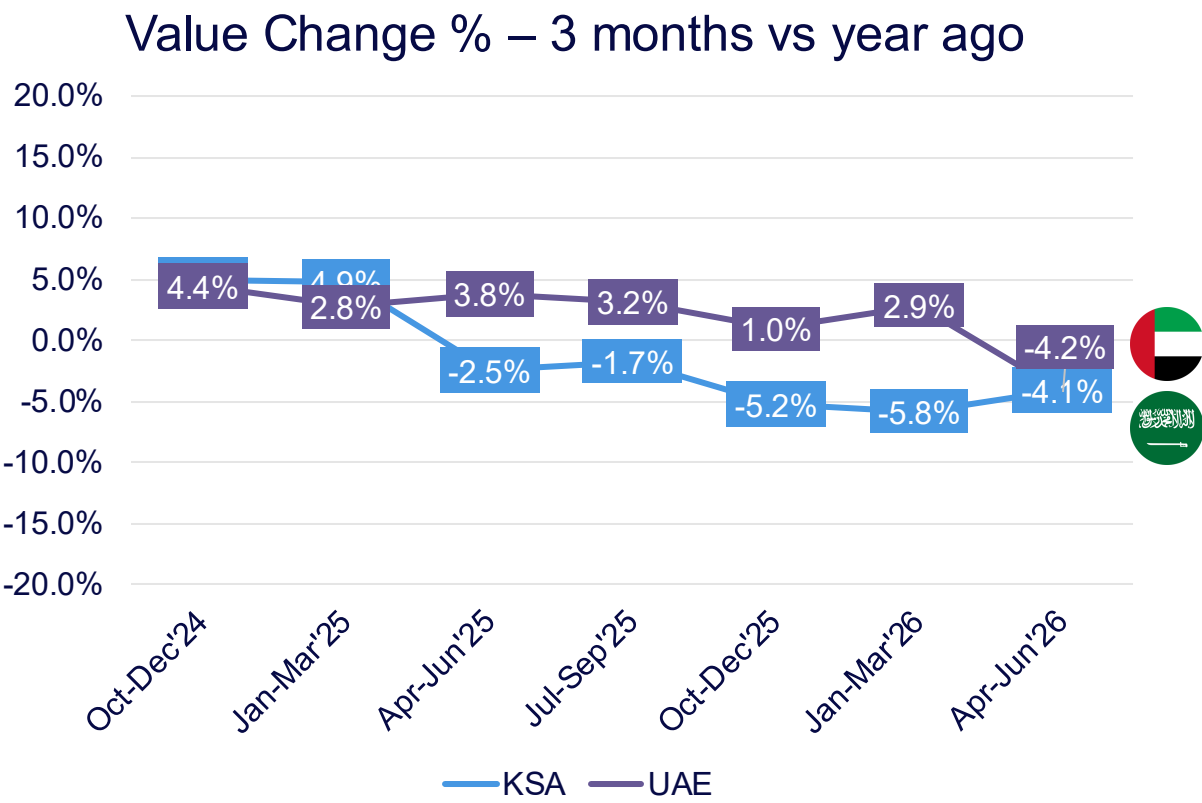
FMCG Trends - Last 3 months vs year ago



Source : NielsenIQ RMS

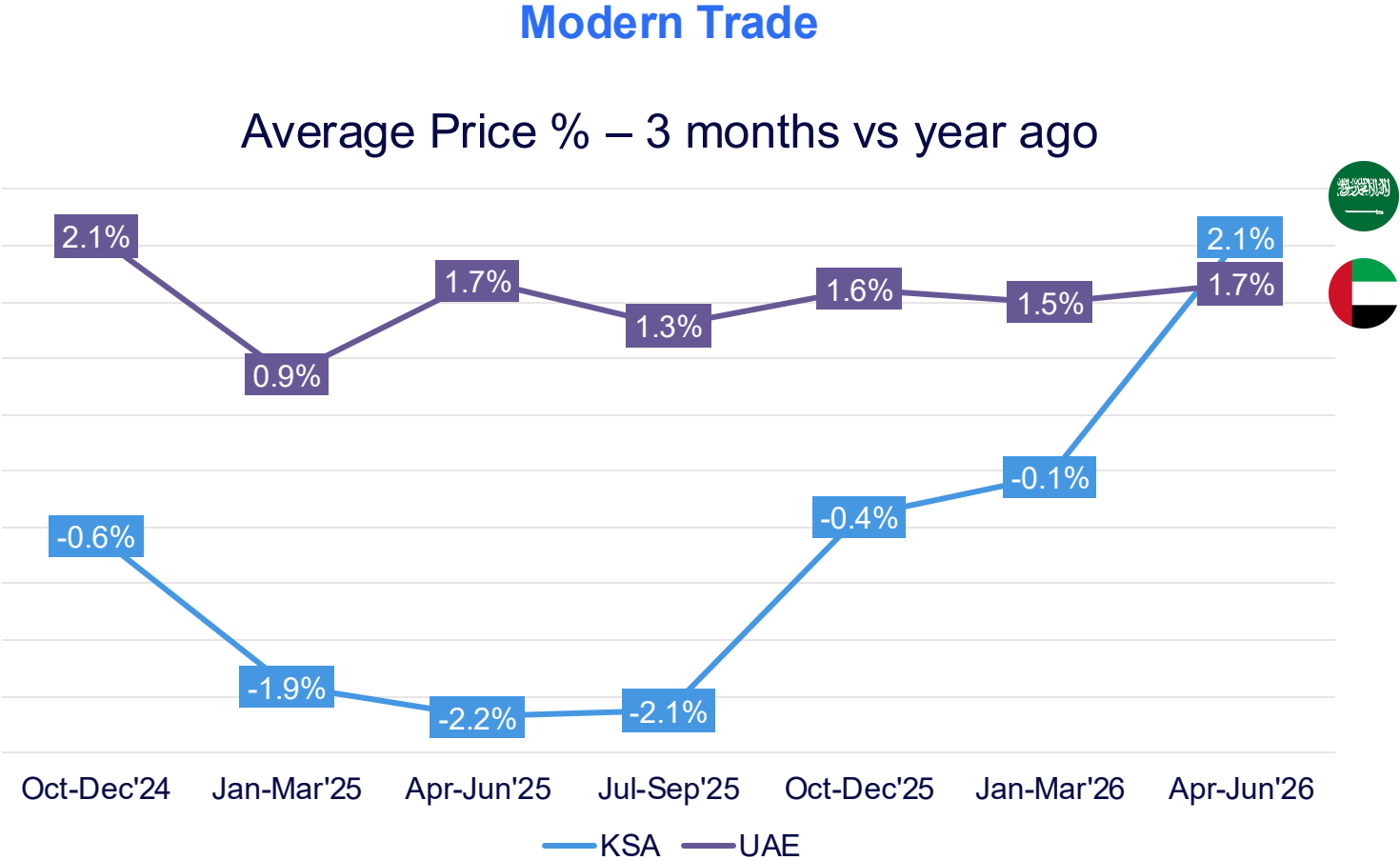
KSA MT drop slowed down to -4% while UAE growth had some softness this quarter and declined to -4%

Modern Trade



Source : NielsenIQ RMS

In both markets, average price change has increased; both markets are at +2%



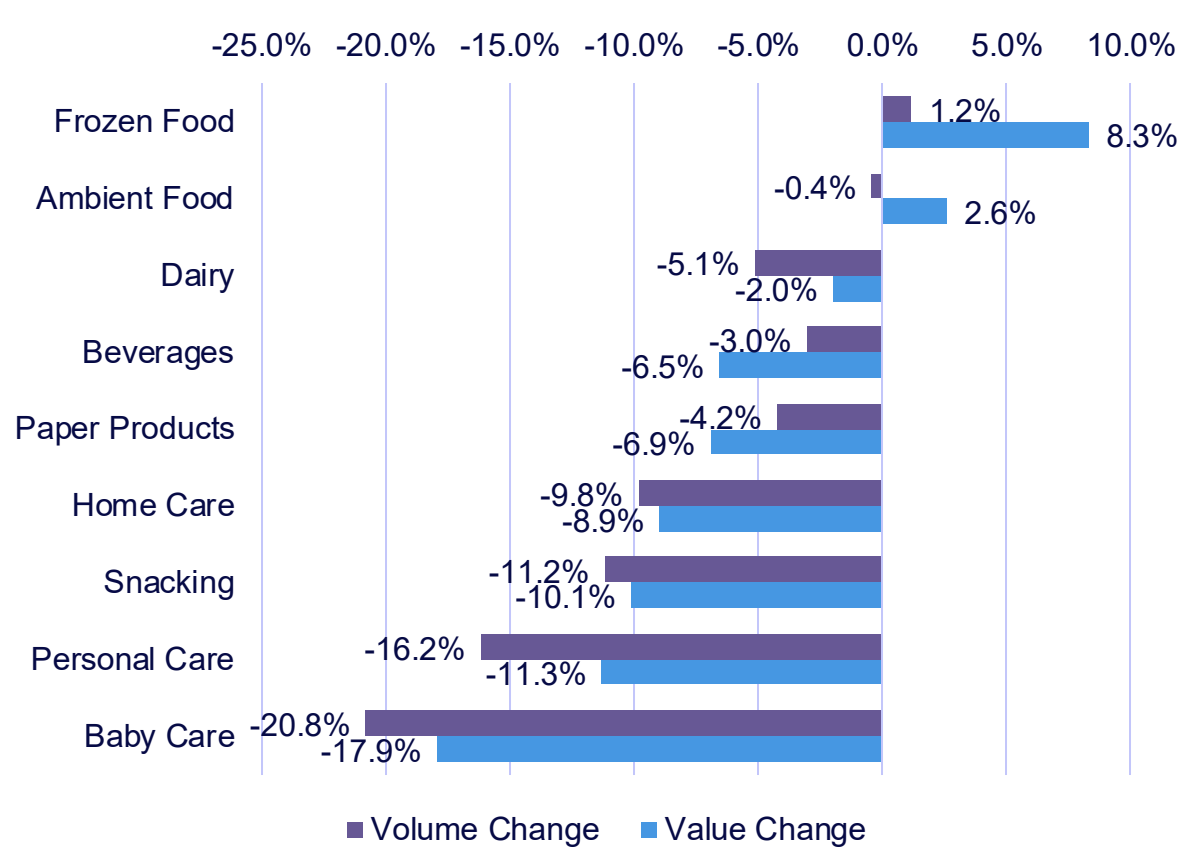
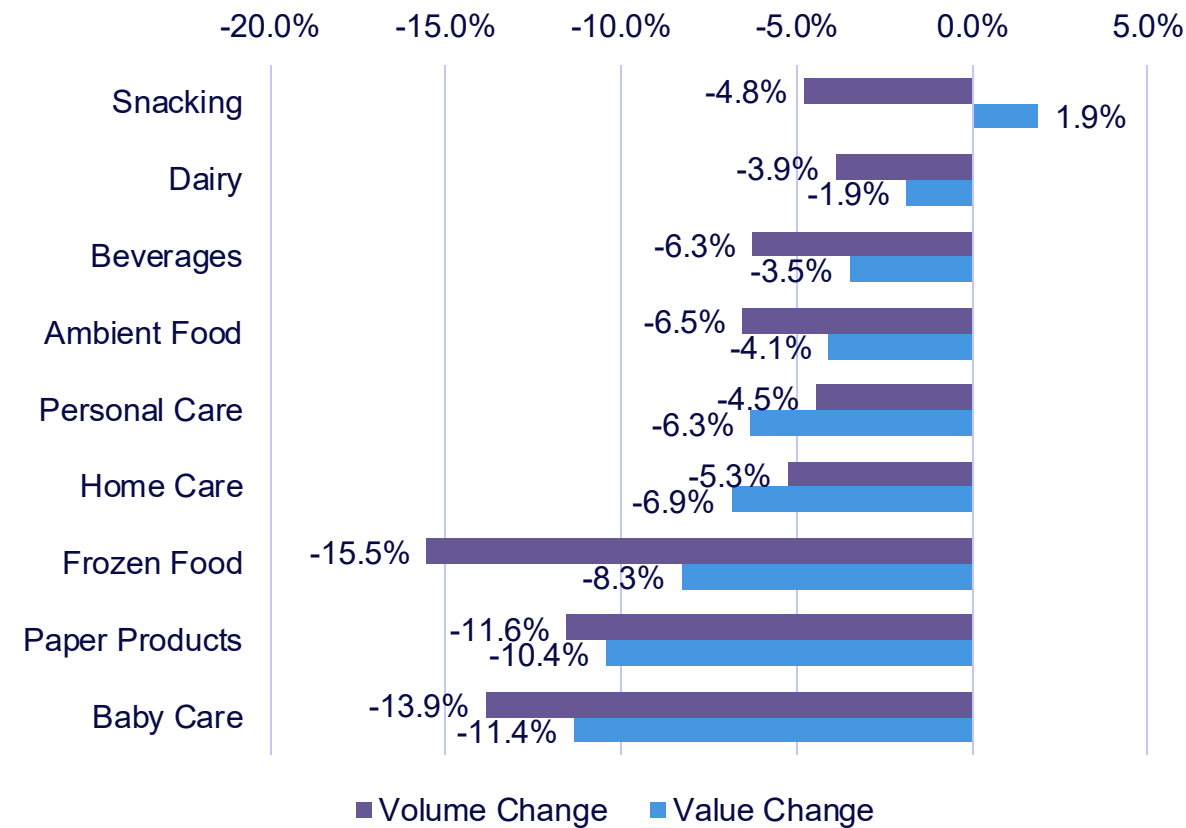
Source : NielsenIQ RMS

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Modern Trade

Value & Volume Change % - Last 3M vs year ago

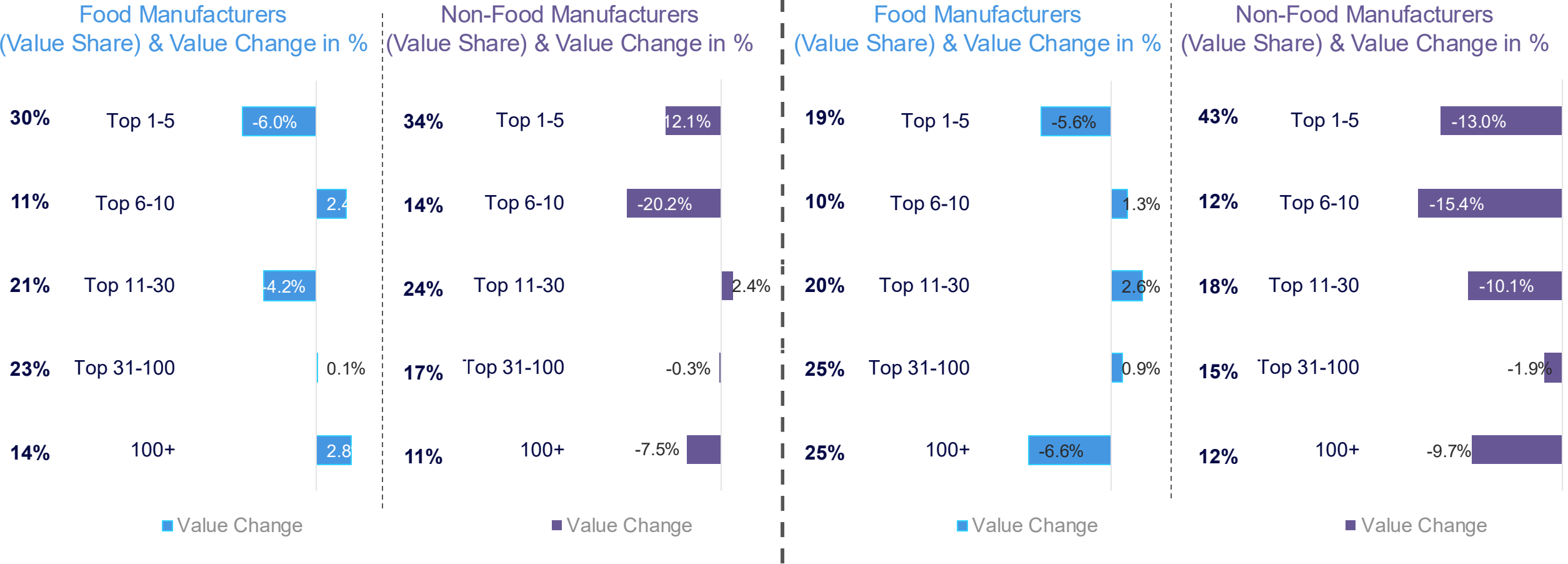


Source : NielsenIQ RMS

Smaller players are performing better vs top players in KSA while the mid tier is the best performing for UAE



Modern Trade Last 3M vs year ago



Source : NielsenIQ RMS

Traditional Trade (Groceries, Catering, Perfumeries)

Period: June 2026 Data Ending



Key Takeaways



UAE TT managed to continue growing double digit at +11% while KSA TT is stable



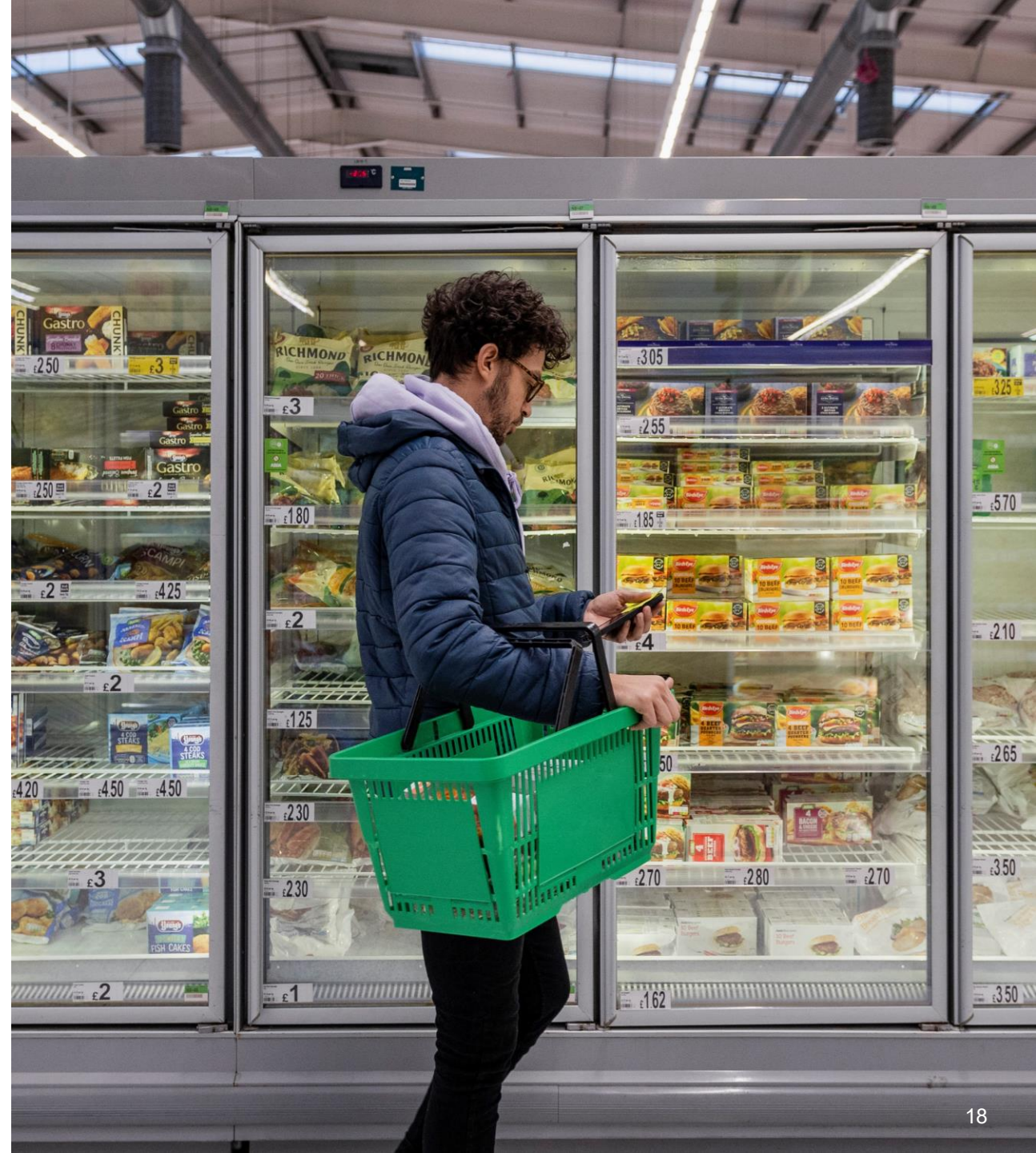
UAE average price change is almost flat at +0.5% while KSA increased to +0.7%



In terms of value, Home Care is the fastest growing basket in KSA while it is Ambient Food in UAE TT



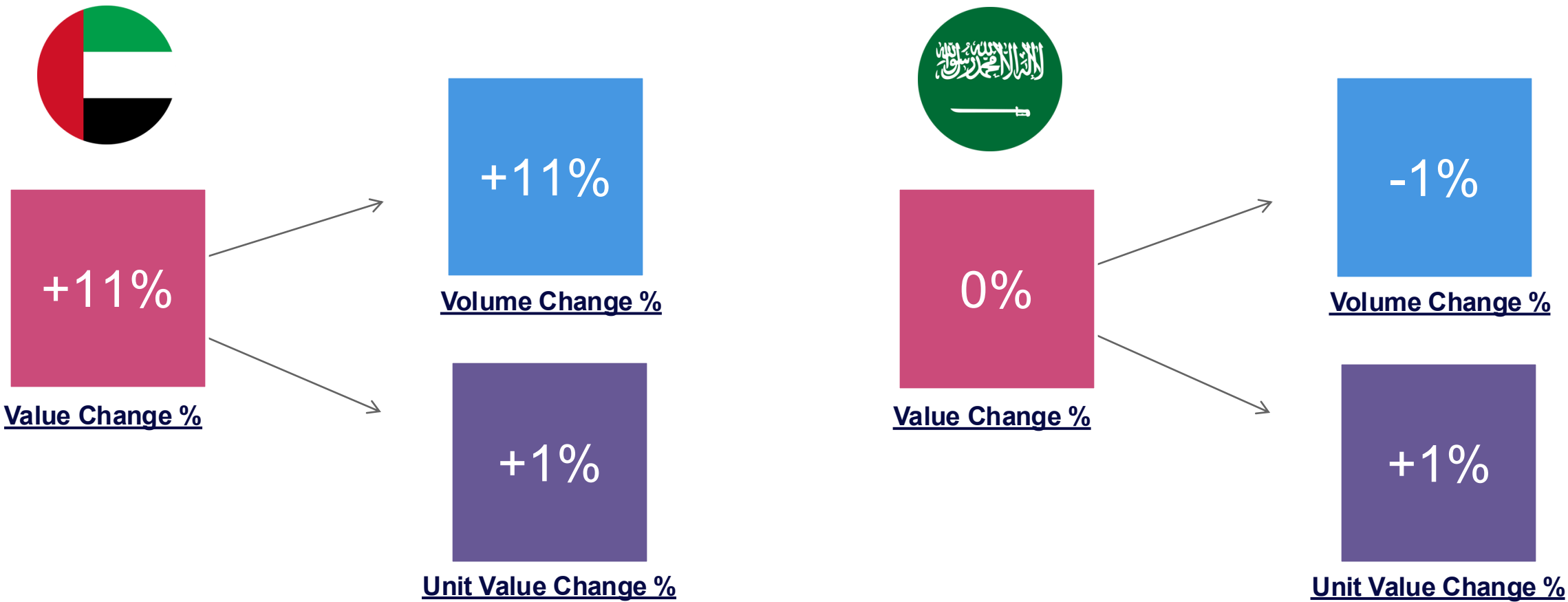
In KSA, top players are performing the best in Food while mid-tier players are outperforming others in Non-Food. For UAE, small players are the best performing in both industries



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Traditional Trade

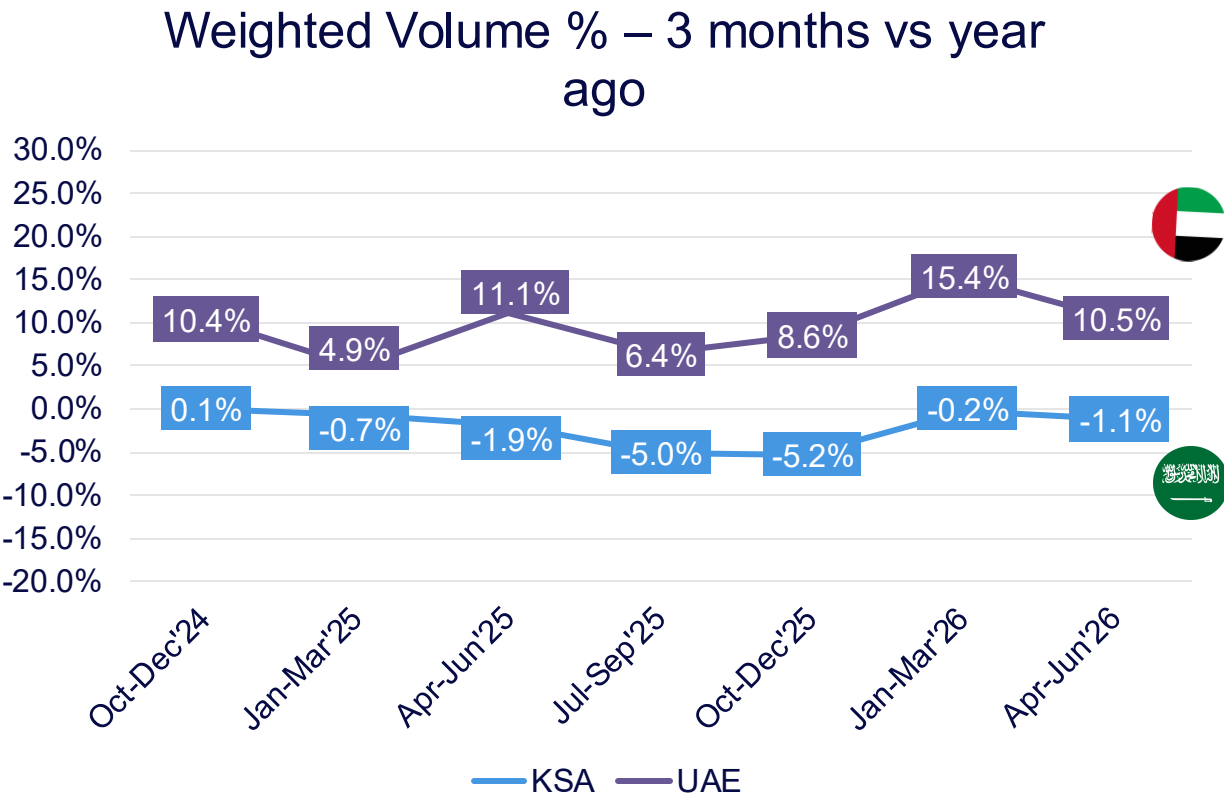
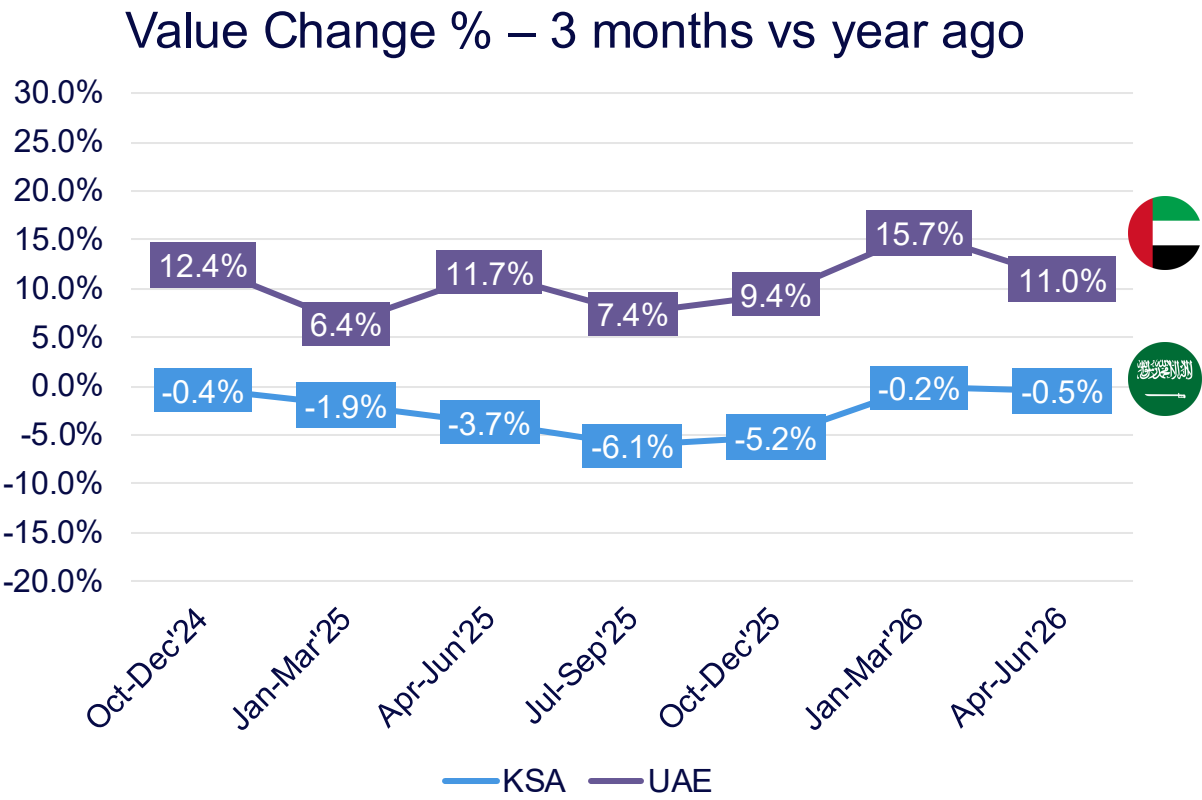
FMCG Trends - Last 3 months vs year ago



Source : NielsenIQ RMS

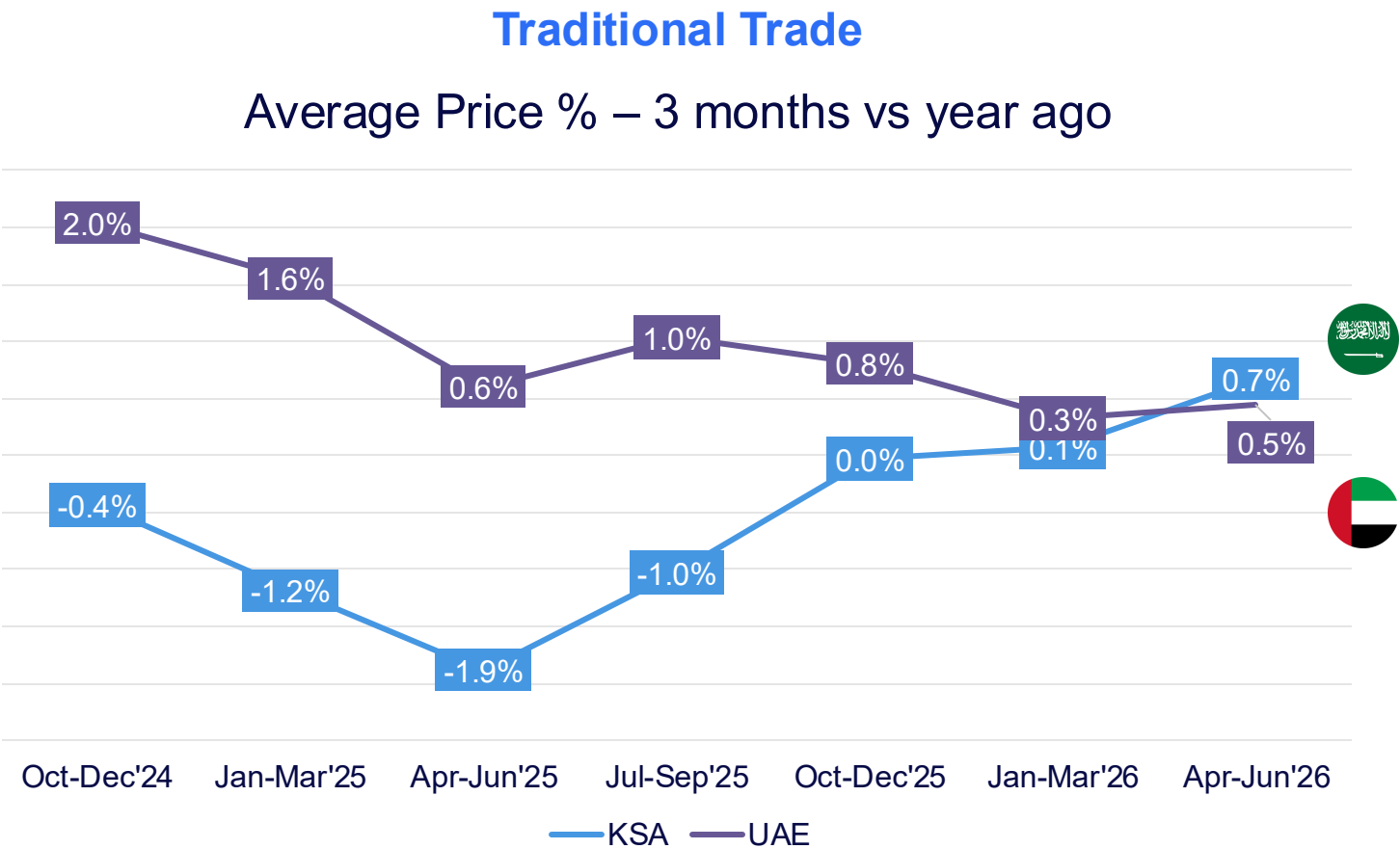
UAE TT managed to sustain its momentum at +11% while KSA TT is almost flat

Traditional Trade



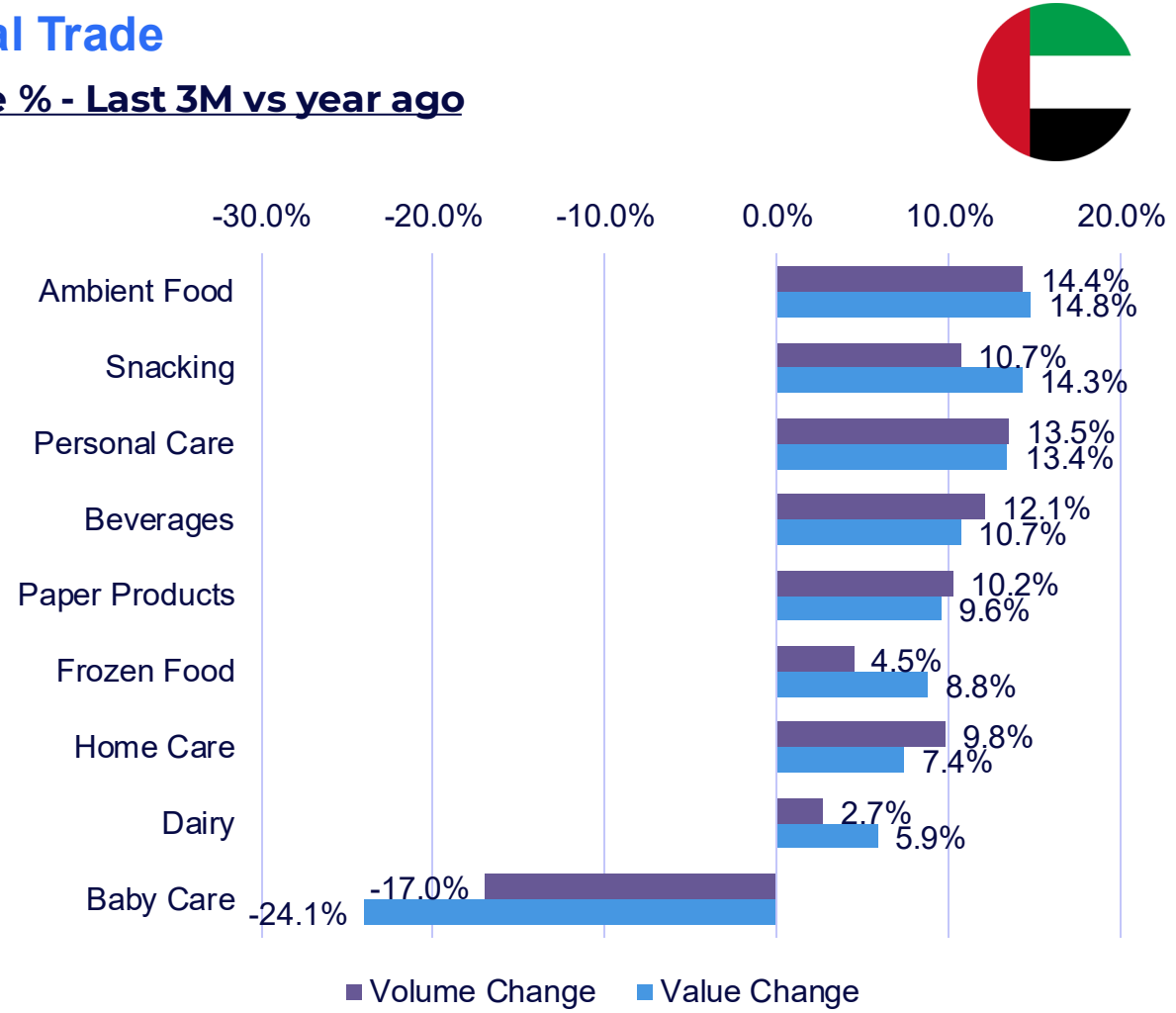
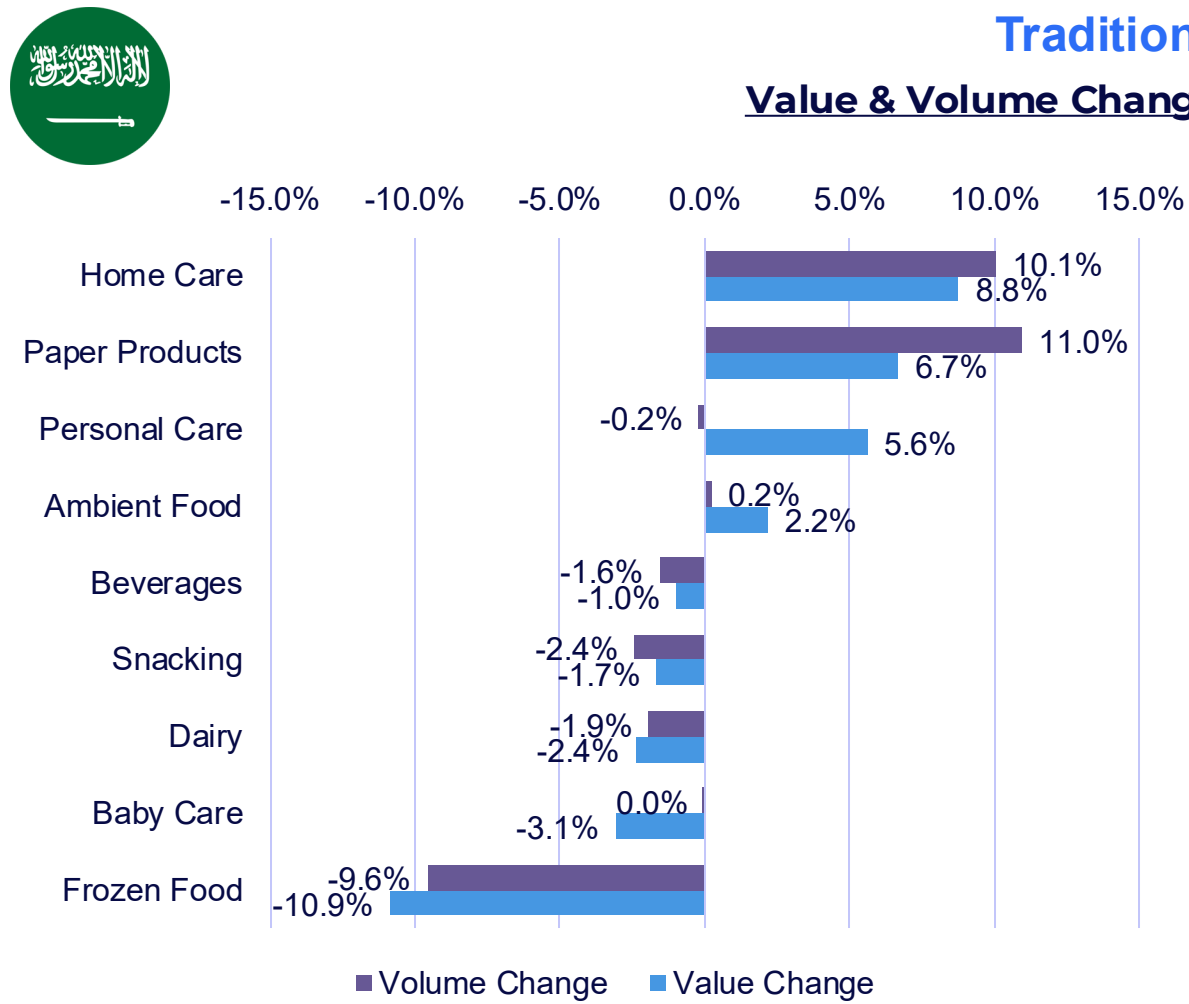
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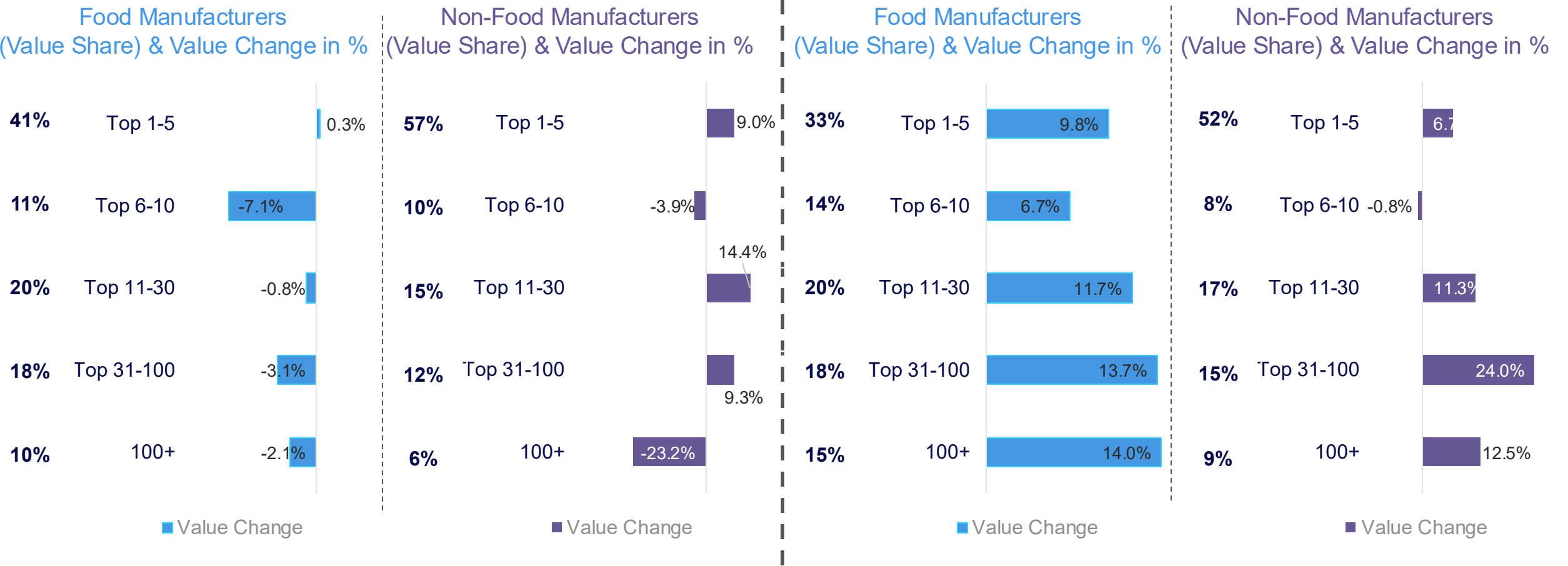


Source : NielsenIQ RMS

In KSA, top players are performing the best in Food while mid-tier players are outperforming others in Non-Food. For UAE, small players are the best performing in both industries



Traditional Trade
Last 3M vs year ago



Source : NielsenIQ RMS

<u>General definition</u>	
<u>Beverages</u>	Beverages, Non-Alcoholic beverages, coffee, tea, powdered milk, RTD Beverages, Hot beverages, non-RTD beverages, spirits, soft drinks
<u>Ambient food</u>	Ambient grocery, canned food / meals, dry grocery, Noodles, packaged foods, seasonings, staple, staple food, culinary shelf stable, processed / canned food, shelf food stable
<u>Frozen food</u>	Frozen food, chilled and frozen products, culinary frozen, frozen products, frozen fish, Ice cream
<u>Snacking</u>	Snacks, confectionary, biscuits savory or sweet, impulse, impulse food, candies, chocolate, candies, salted snacks, salty snacks, sweet snacks, sweets and treats
<u>Dairy</u>	All dairy based products – milk, yoghurt , dairy & refrigerator categories, fresh food refrigerated dairy, Milk & shakes
<u>Homecare</u>	Household care, home care, home care merchandise, detergents, wash & housekeeping products, laundry
<u>Personal Care</u>	Personal care, grooming & hygiene, Appliances, cosmetics, fragrances, body care, face care, haircare, health & wellness supplements, vitamin supplements, Oral care, Oral hygiene, OTC, Pharma, grooming, make up, sanitary
<u>Baby care</u>	Baby Food (baby biscuits, baby cereal, baby juice, baby milk, infant formula), Diapers, Baby Wipes
<u>Paper Products</u>	Toilet paper, paper products,

The Full View™

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If you would like to explore how these insights can help shape your 2026 strategies, we would be happy to schedule a discussion with you and your team. Looking forward to supporting your business growth!

Thank you!

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