FMCG and T&D State of Nation Q3’26

KSA & UAE



Period: MAT Sep’26 Data Ending

NIQ

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Key Takeaways - FMCG

- Although Modern Trade remains the key and biggest channel, Ecom is the key driver of growth for both markets whereas TT managed to grow double digit in UAE

- Petcare witness the fastest growth in KSA followed by Snacking while Ambient Food is #1 in UAE while Pet Care managed to be the follower

- In KSA, we observe clearly a polarized move towards both value and premium players while UAE has a more balanced view across all tiers



Key Takeaways – T&D

- Online sales grew 19.4% in KSA and 18.3% in UAE, gaining share as offline sales declined. Independents also outpaced Organized Retail in both markets, reinforcing the need for stronger execution across e-comm and fragmented retail channels.

- T&D value increased 2.5% in KSA and 5.4% in UAE, supported by positive unit growth. Performance remained uneven, with Photo/Optics leading in both markets, while Headsets drove KSA category growth and Media Tablets led UAE. Major appliances remained under pressure.

- Premium brands increased their share to 61% in KSA and 66% in UAE, demonstrating continued demand for higher-value products. At the same time, brands grew 25% in KSA and 17% in UAE, accompanied by substantial SKU expansion, increasing consumer choice and competitive intensity.

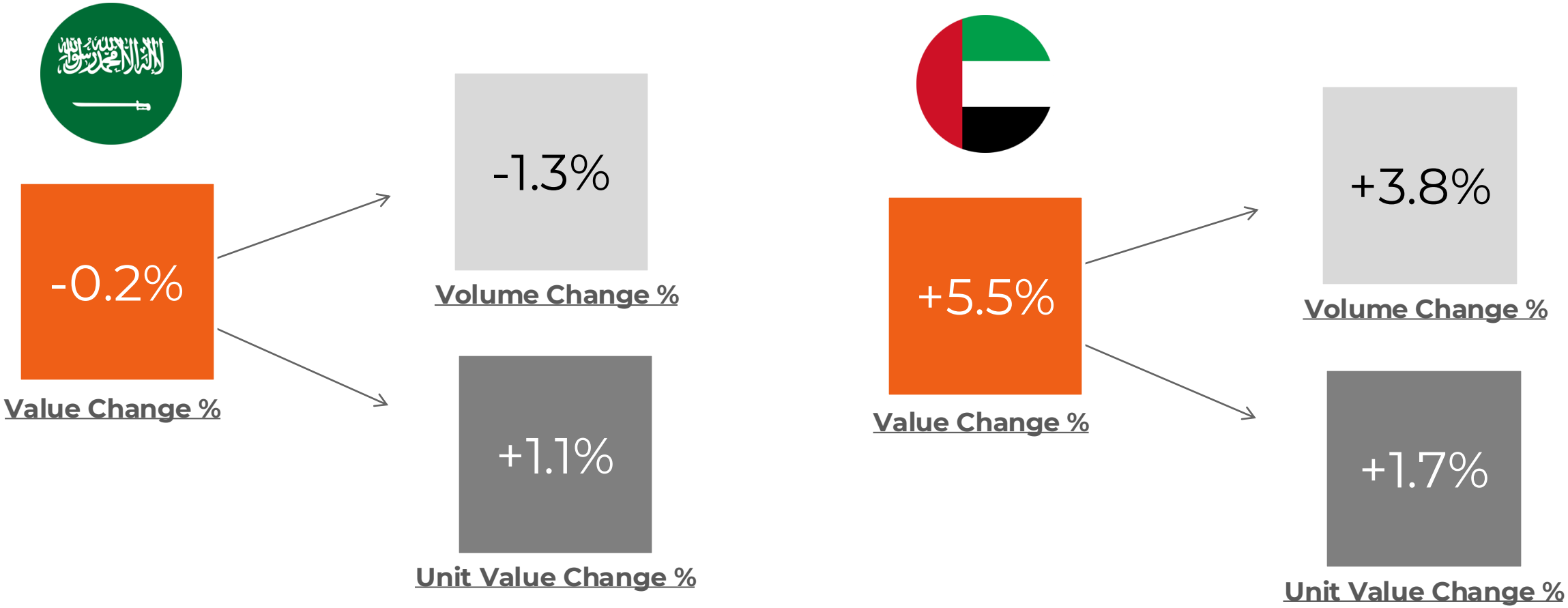


State of FMCG and Tech & Durables:

Challenges and Opportunities

KSA market is almost flat due to consumption declines while UAE growth continues led by mostly volume increases with support from price hikes

FMCG Trends – MAT Q3'26 vs MAT Q3'25

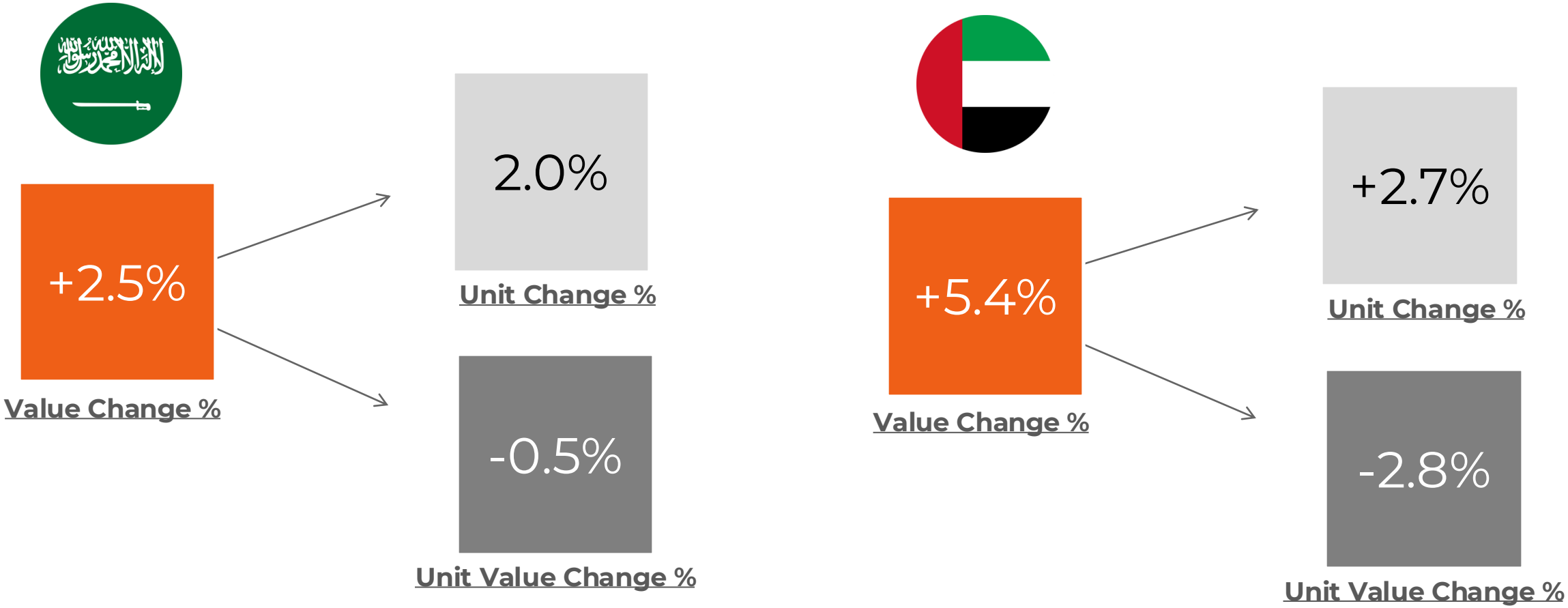


Source : NielsenIQ RMS, Total FMCG. Updated Sep 2026

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Value growth in UAE and KSA remained price-led, as strong value gains outpaced modest volume growth.

T&D Trends – MAT Q3'26 vs MAT Q3'25

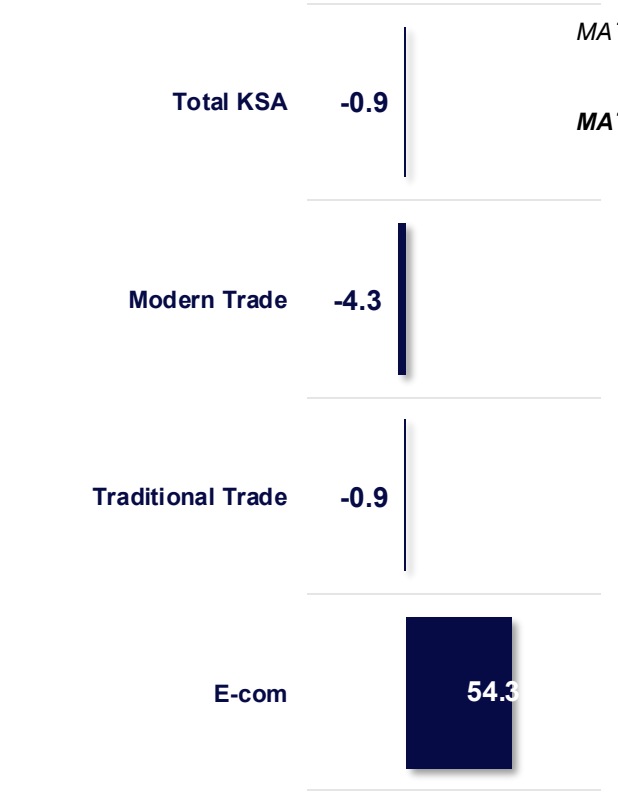


Source : GfK, Total T&D. Updated Sep 2026

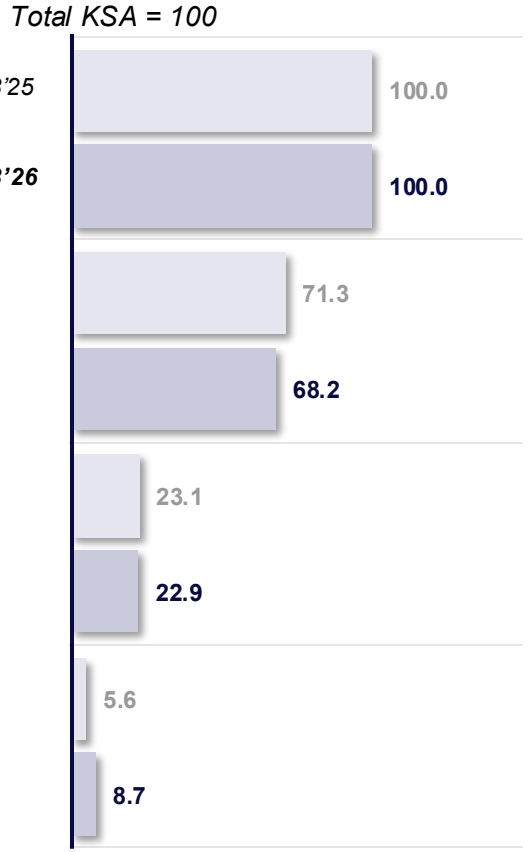
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Although Modern Trade remains the key and biggest channel, Ecom is the key driver of growth for both markets whereas TT managed to grow double digit in UAE

FMCG Value Change (%)
(MAT Q3'26 vs LY)



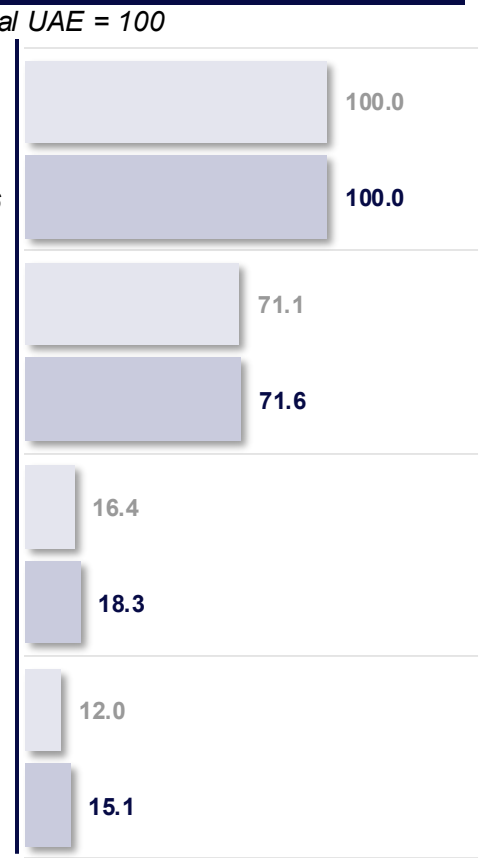
Value Split by Channel



FMCG Value Change (%)



Value Split by Channel



Source: NielsenIQ Retail Panel

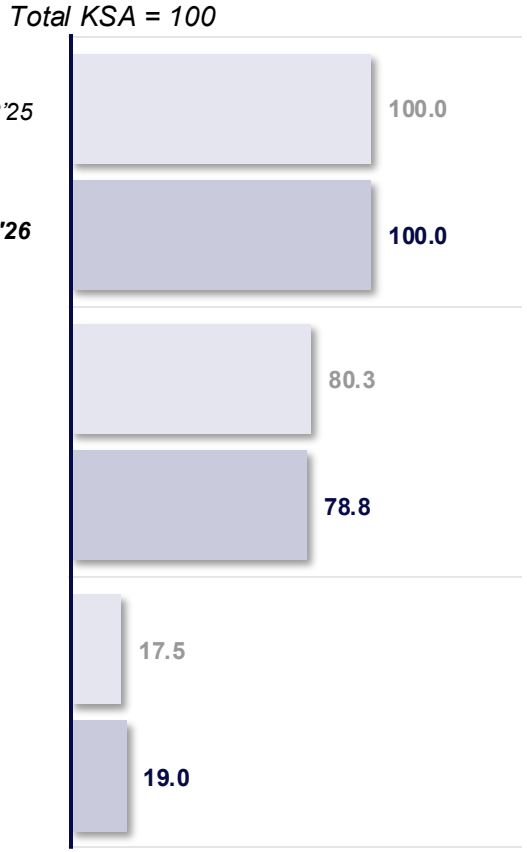
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Independent channels continue to outpace Organized Retail, gaining share across both UAE and KSA.

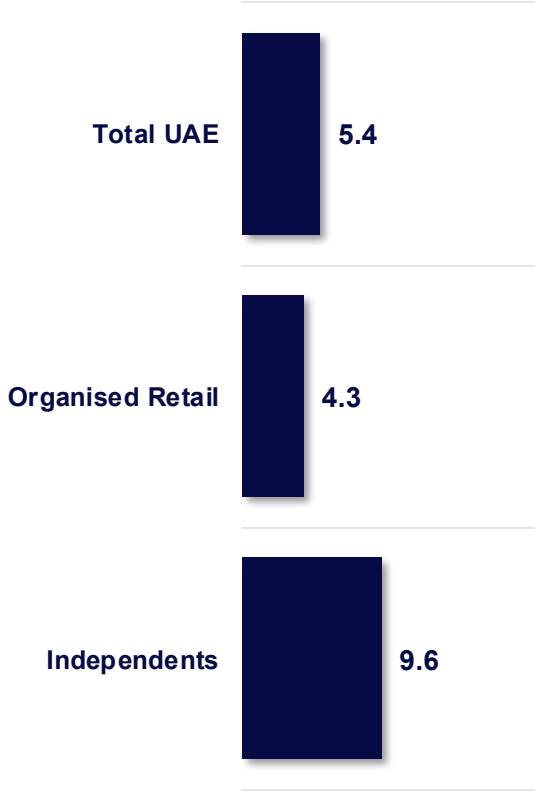
TCG Value Change (%)
(MAT Q3'26 vs LY)



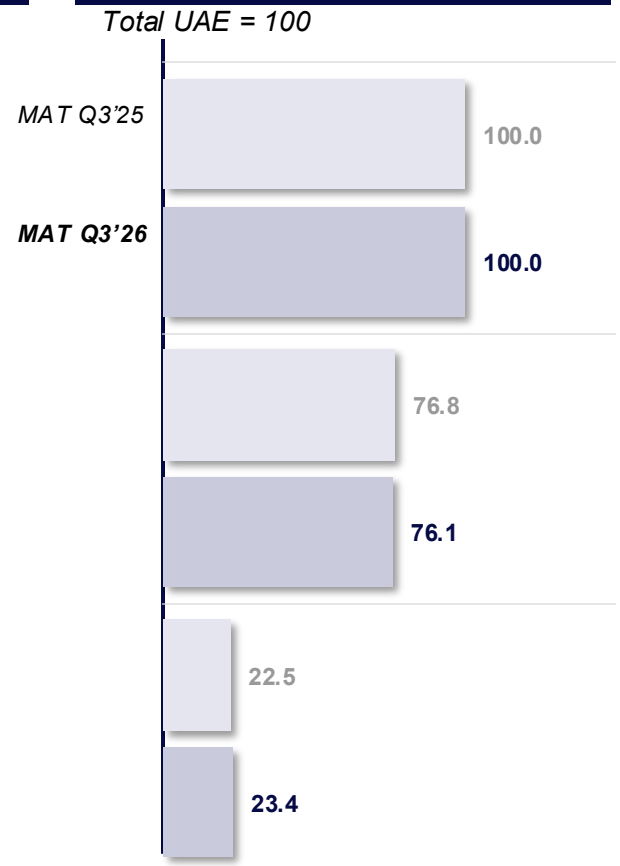
Value Split by Channel



TCG Value Change (%)



Value Split by Channel

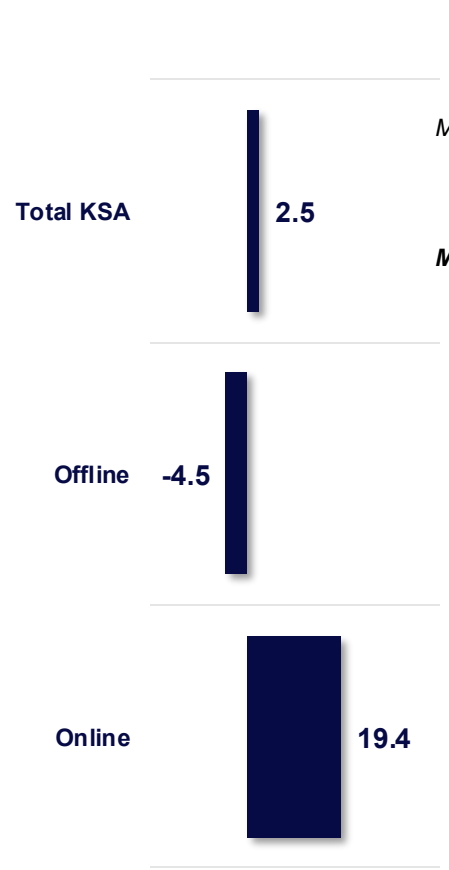


Source: GfK Panel

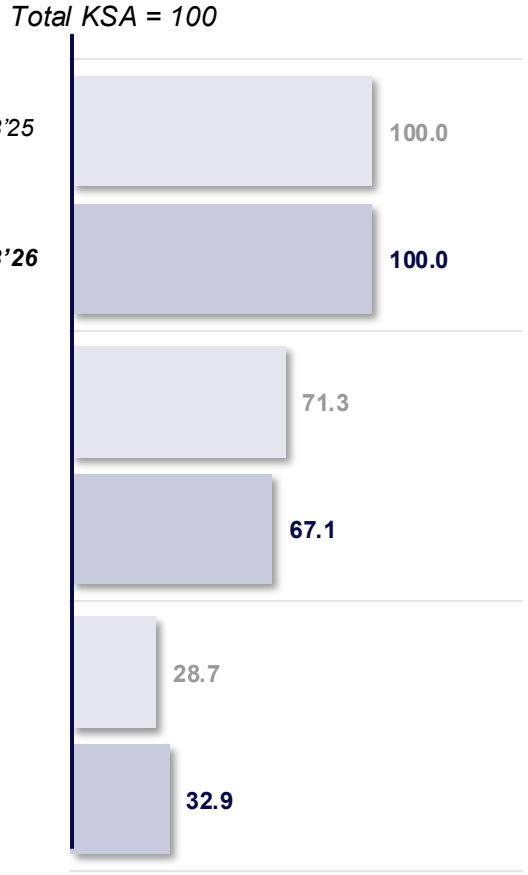
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E-commerce expanded its footprint across UAE and KSA, with online sales now accounting for over one-third of the market in UAE and one-third in KSA.

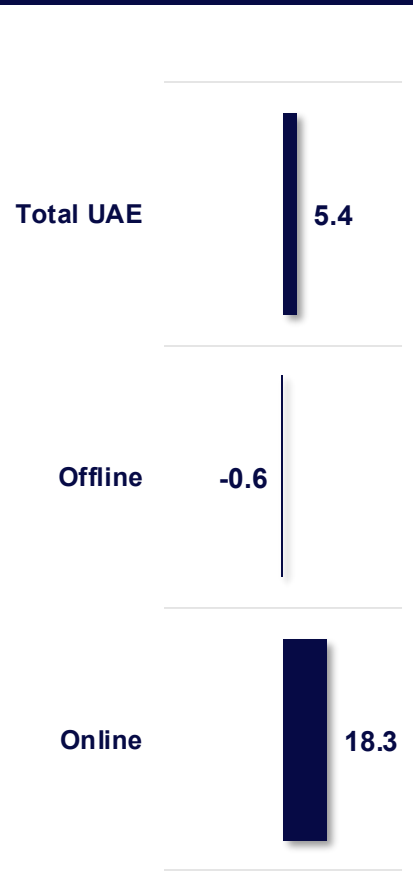
TCG Value Change (%)
(MAT Q3'26 vs LY)



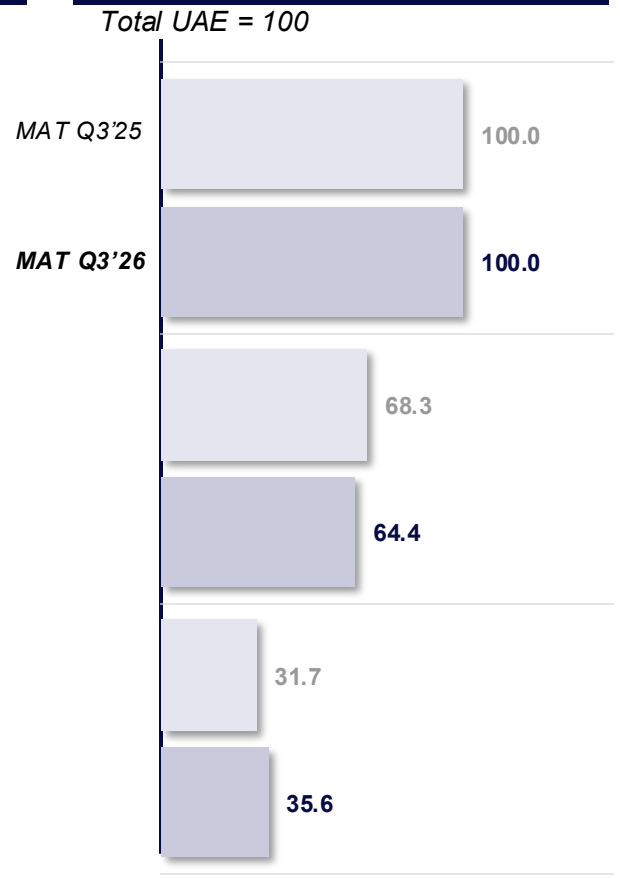
Value Split by Channel



TCG Value Change (%)



Value Split by Channel

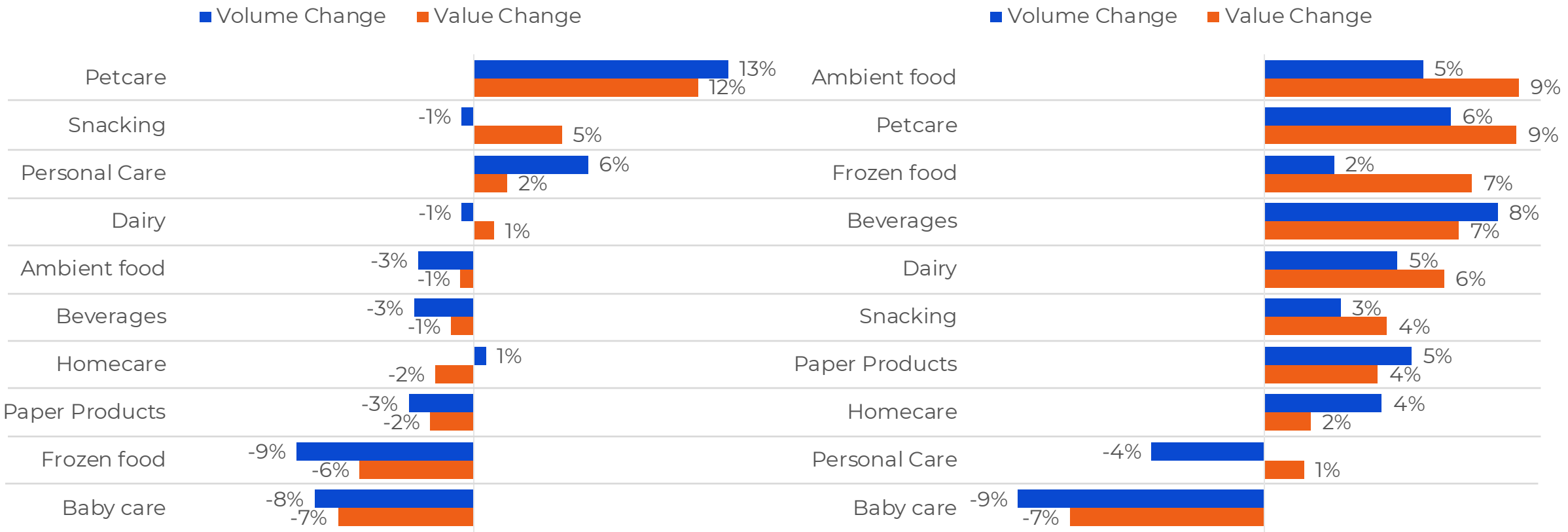


Source: GfK Panel

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Petcare witness the fastest growth in KSA followed by Snacking while Ambient Food is #1 in UAE while Pet Care managed to be the follower

Value & Volume Change % in FMCG – MAT Q3'26 vs MAT Q3'25

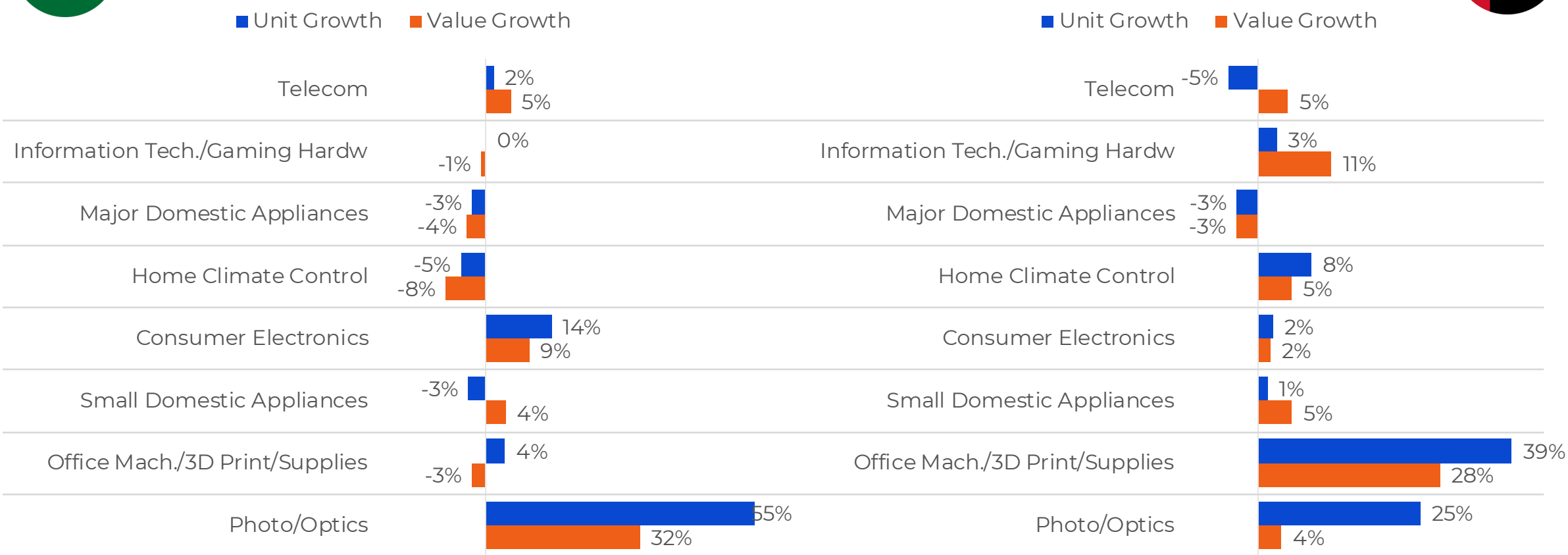


Source : NielsenIQ RMS, Total FMCG, Updated Sep 2026

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T&D growth remained uneven across UAE and KSA, with strong gains in selected sectors offset by continued weakness in major appliances.

Value & Volume Change % in T&D – MAT Q3'26 vs MAT Q3'25 Across Sectors

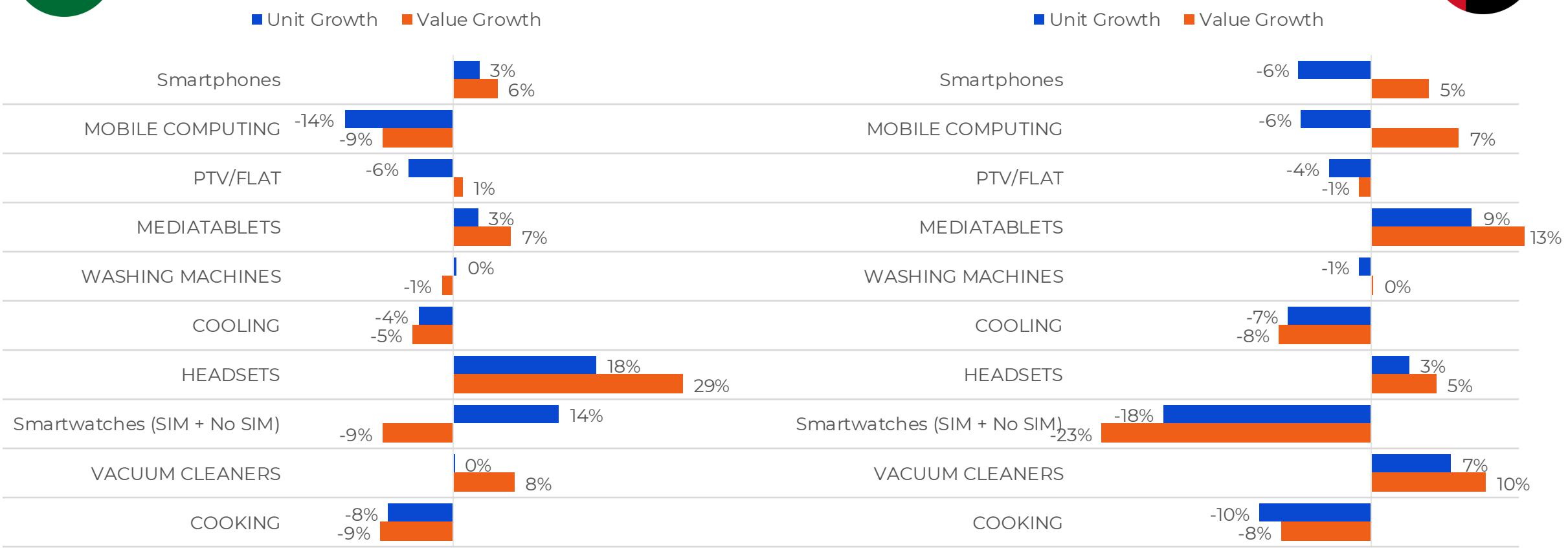


Source : GfK, Total T&D, Updated Sep 2026

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Category performance diverged across markets, with Headsets driving KSA and Media Tablets leading UAE growth.

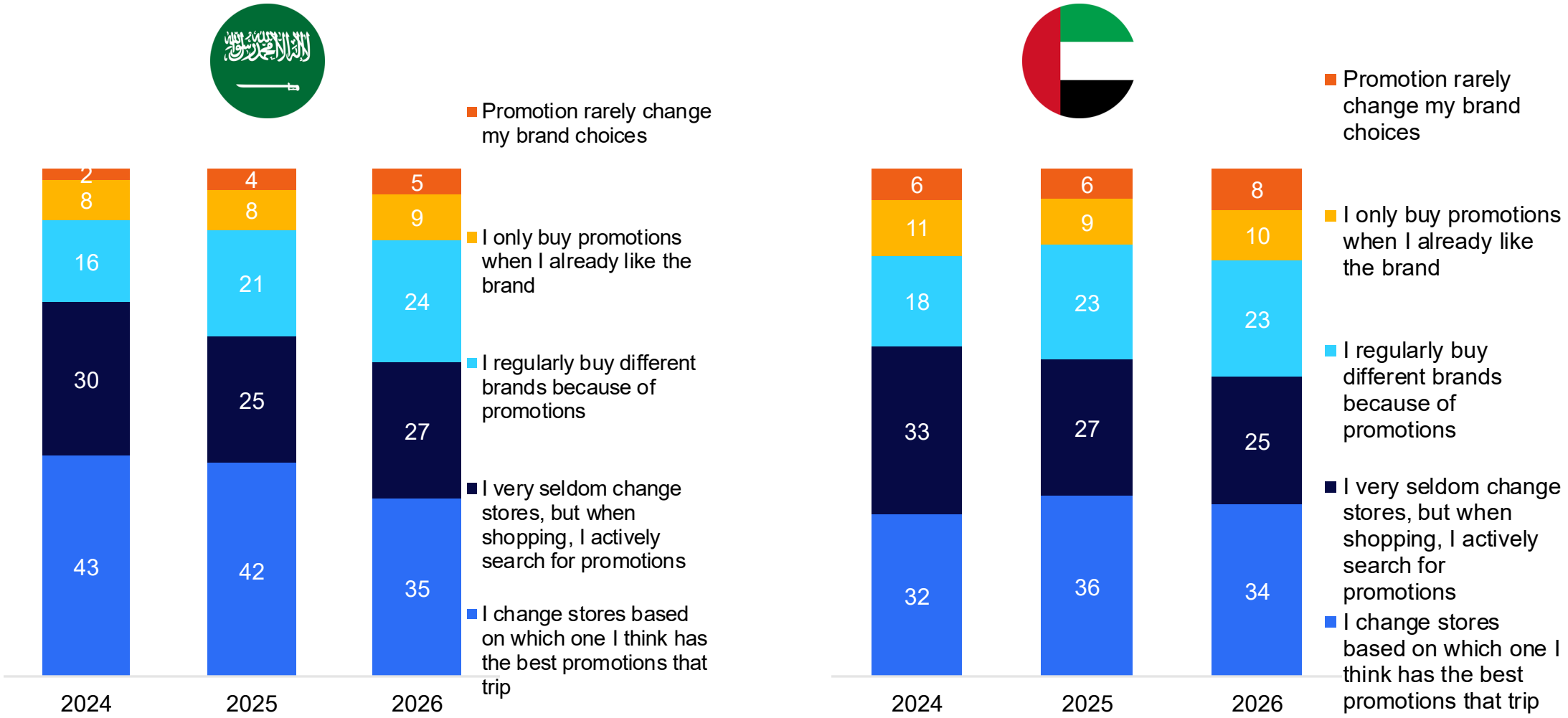
Value & Volume Change % in T&D – MAT Q3'26 vs MAT Q3'25 Across Top 10 Categories



Source : GfK, Total T&D, Updated Sep 2026

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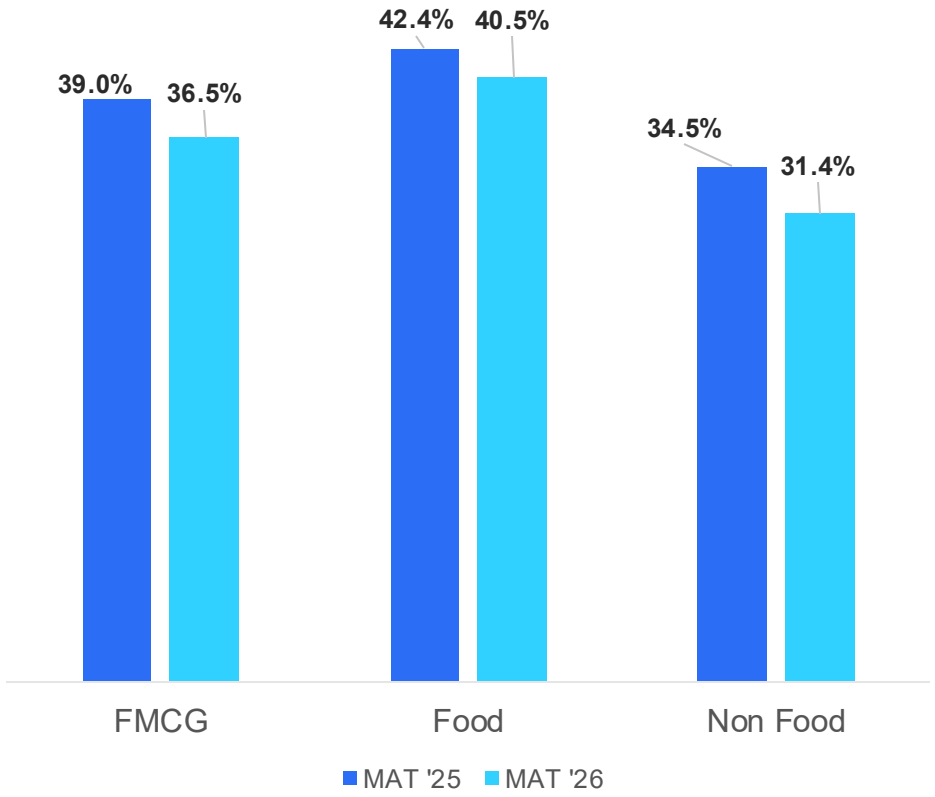
Promotion sensitivity has always been high in both markets, but more shoppers in KSA and UAE buy different brands due to promotions.



Ref Q23 Which of the following best describes how promotions affect your supermarket/hypermarket shopping?
Base: All HM/SM shoppers

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Total FMCG % Value Sold on Deal

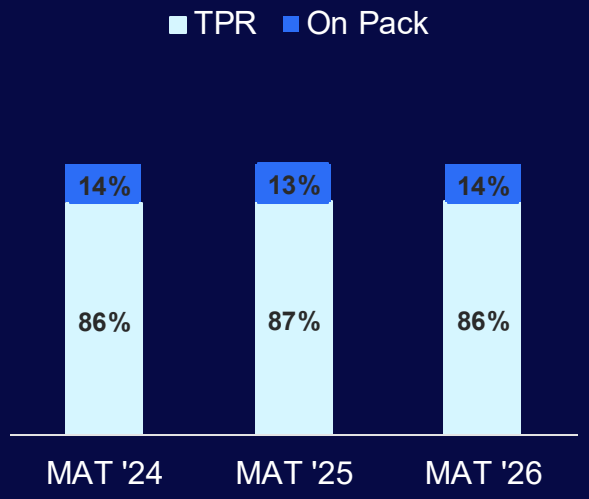


Source: NIQ Scantrack

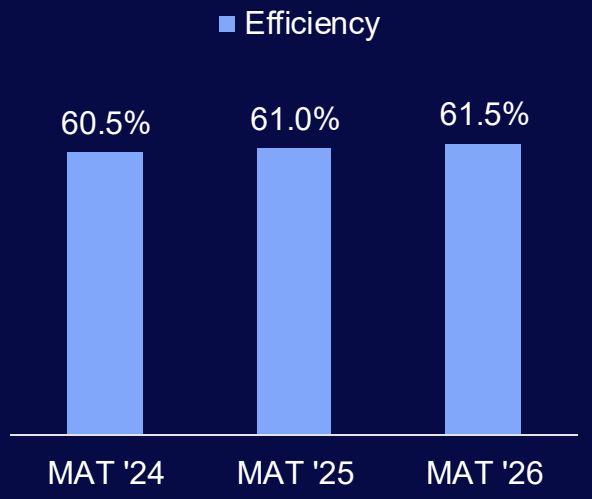
More Price discounting (TPR) promotions

TPR/On Pack = Type of promotion; Efficiency = % Incremental sales from promotion

Promo Type

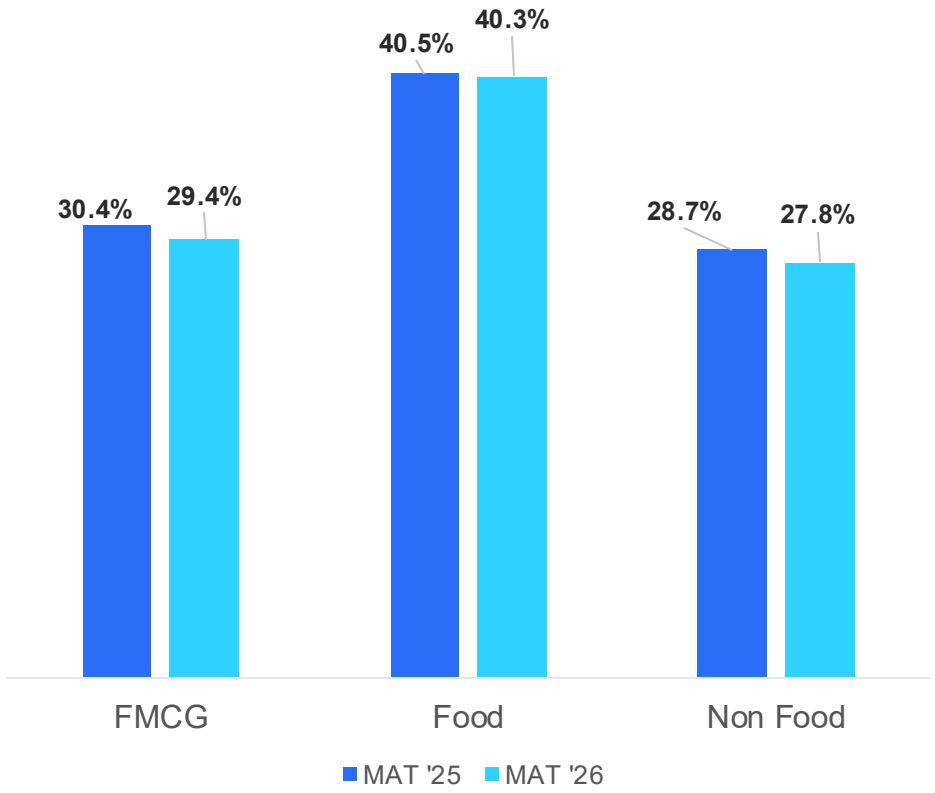


Promo Efficiency



- *Promotions for latest MAT have declined compared to previous year*
- *Temporary Price Discounts (TPR) dominate promotions and remained same vs LY*
- *Promotion Efficiency has increased slightly compared with LY.*

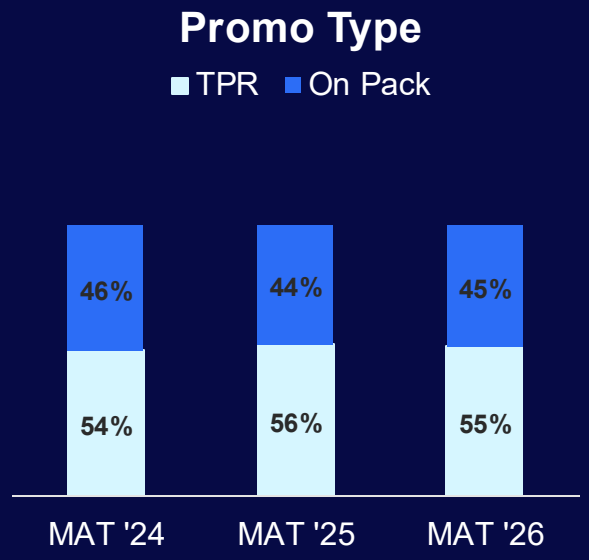
Total FMCG % Value Sold on Deal

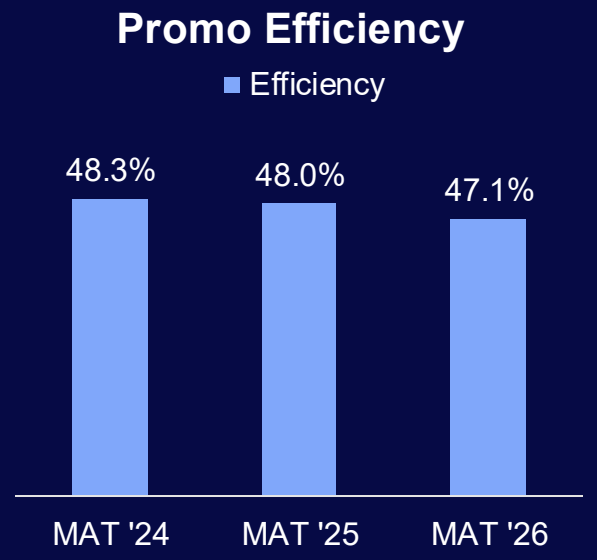


Source: NIQ Scantrack

More Price discounting (TPR) promotions

TPR/On Pack = Type of promotion; Efficiency = % Incremental sales from promotion





- *Promotions for latest MAT have declined compared to previous year*
- *Temporary Price Discounts (TPR) has slightly higher share in promotions and marginally up vs LY*
- *Promotion Efficiency has been declining in UAE compared to previous years.*

Although value for money offerings are important…

70% Vs 2024: 66%

Of shoppers in KSA/UAE claim that they are willing to pay more for quality products as they care about quality



Ref. Q132 We have a few questions about your attitudes towards grocery shopping.
In general when shopping, to what extent do you agree or disagree with the following statements?
Base: All HM/SM shoppers

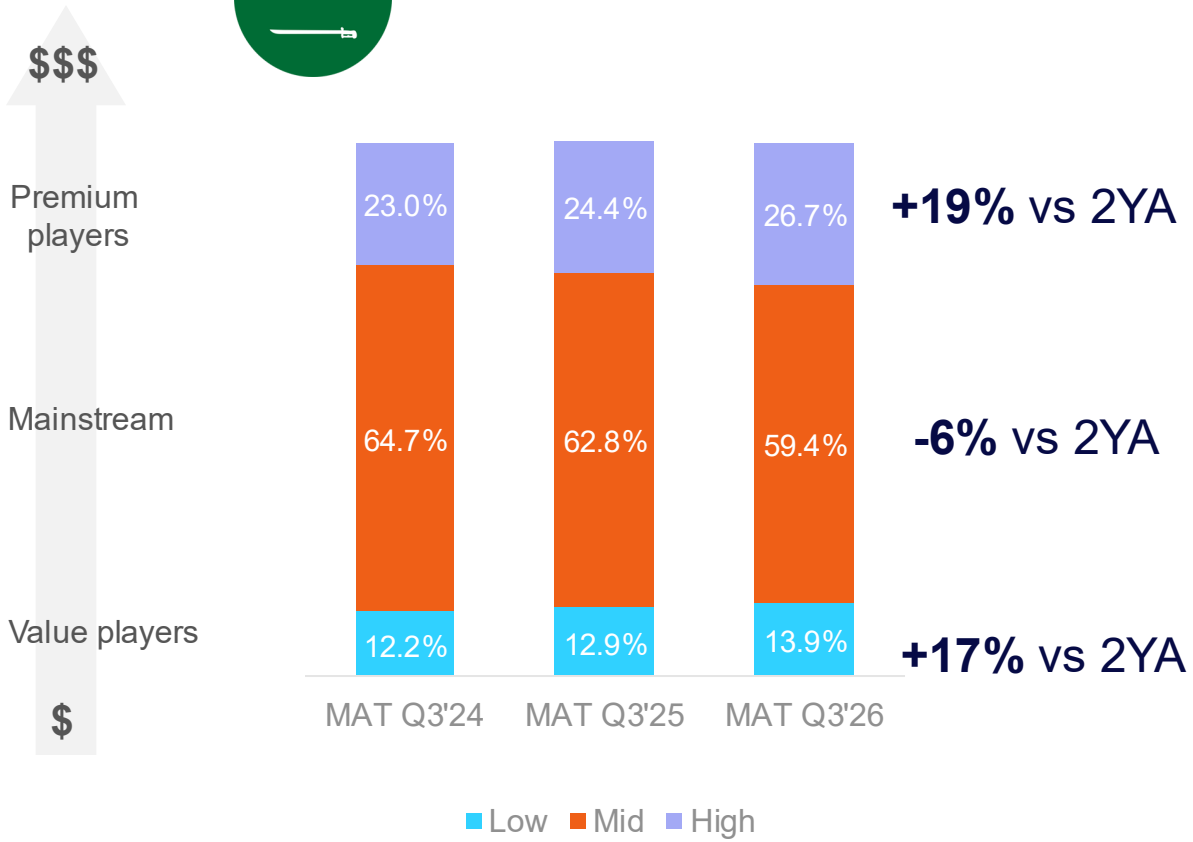
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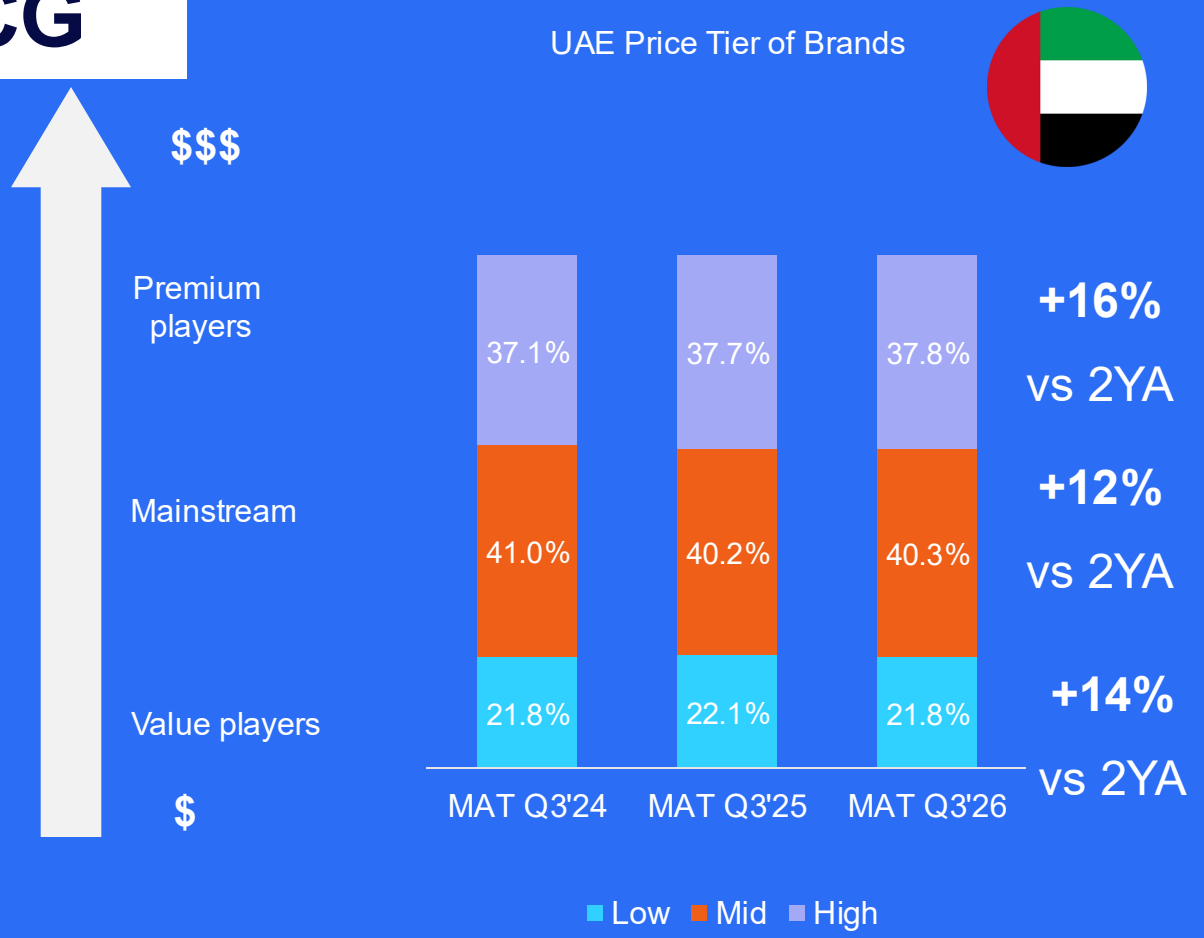
In KSA, we observe clearly a polarized move towards both value and premium players while UAE has a more balanced view across all tiers

FMCG

KSA Price Tier of Brands



UAE Price Tier of Brands

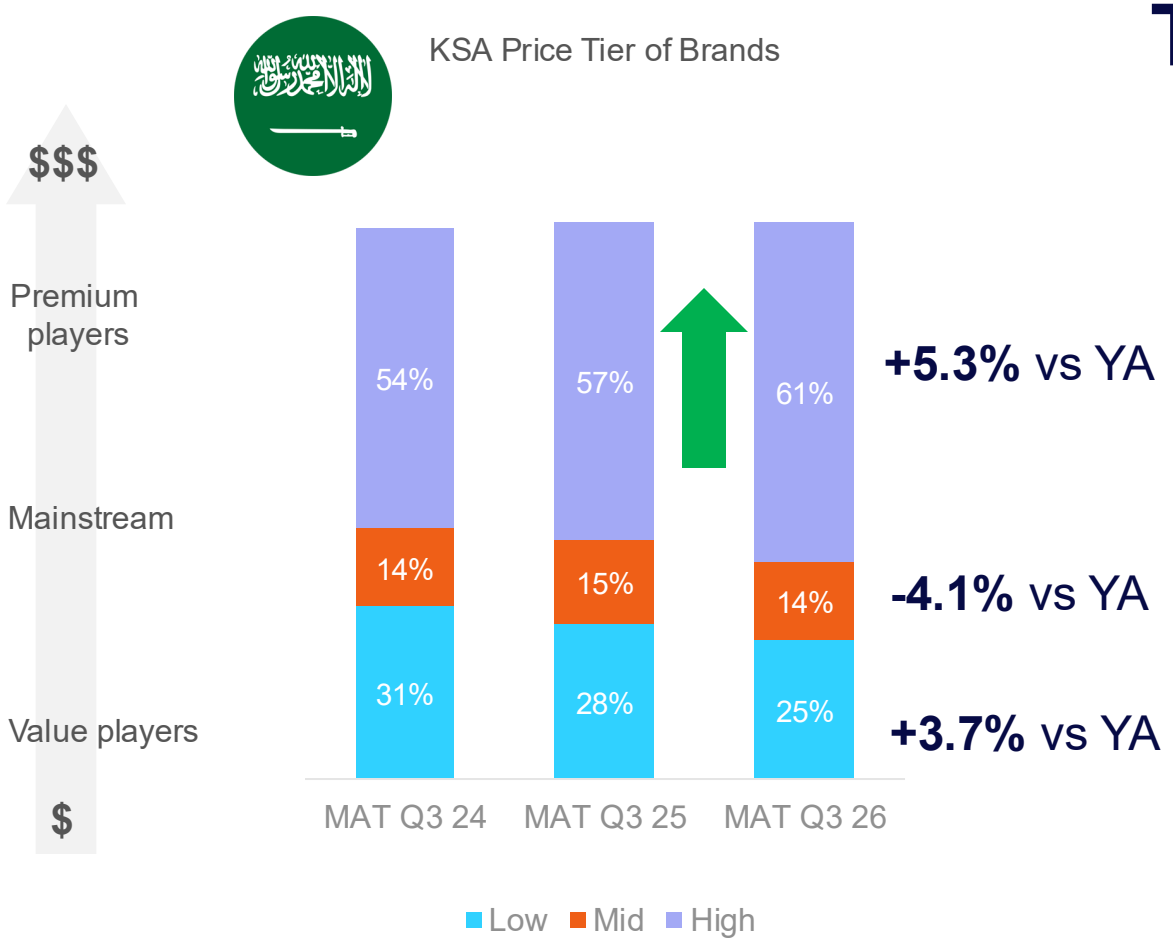


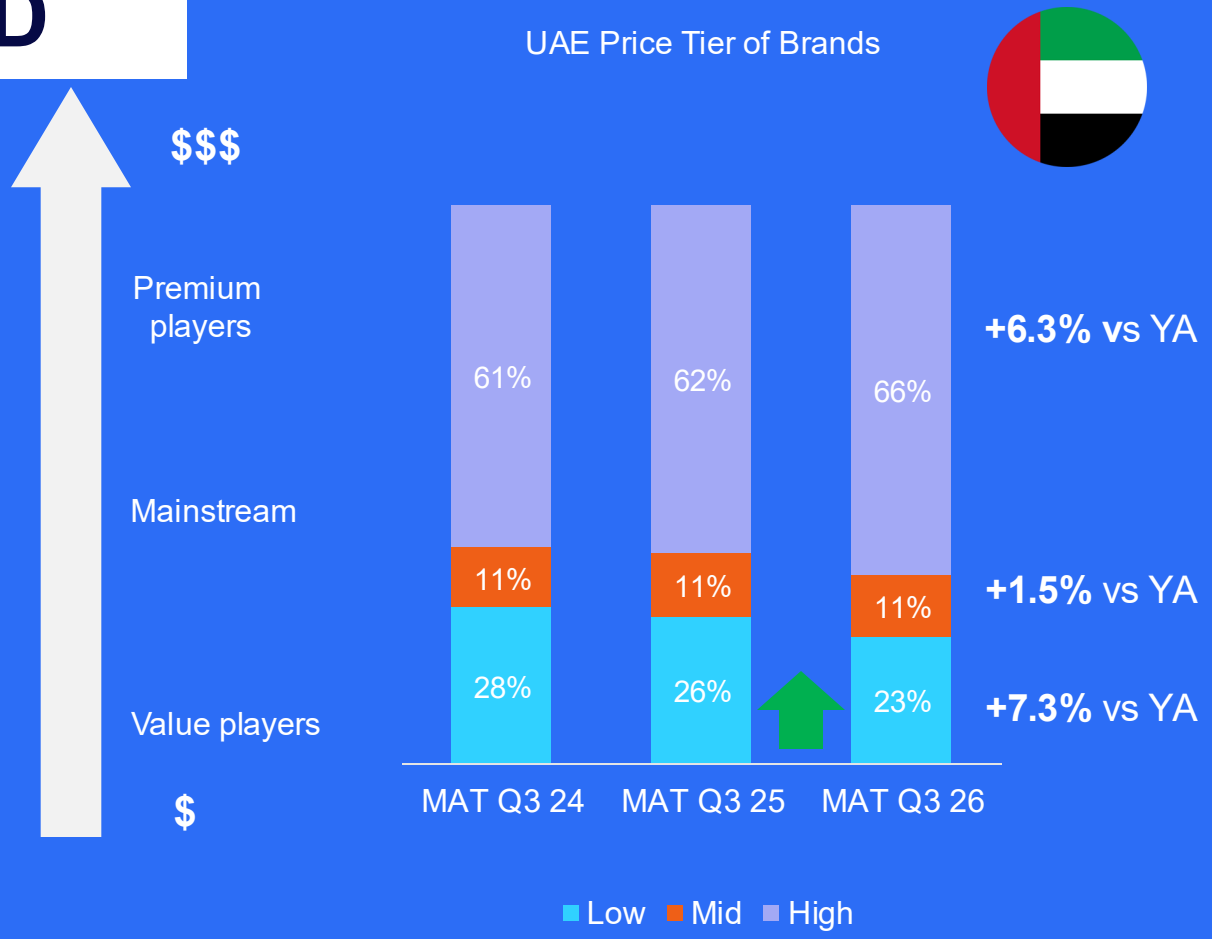
Source: NIQ RMS Data Ending Sep'26
Low: Brands with 0-80% price index to their respective category
Mid: Brands with 80-120% price index to their respective category
High: Brands with 120+% price index to their respective category

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Premium brands strengthened their position across KSA and UAE, gaining share as demand shifted toward higher-value T&D products.

T&D

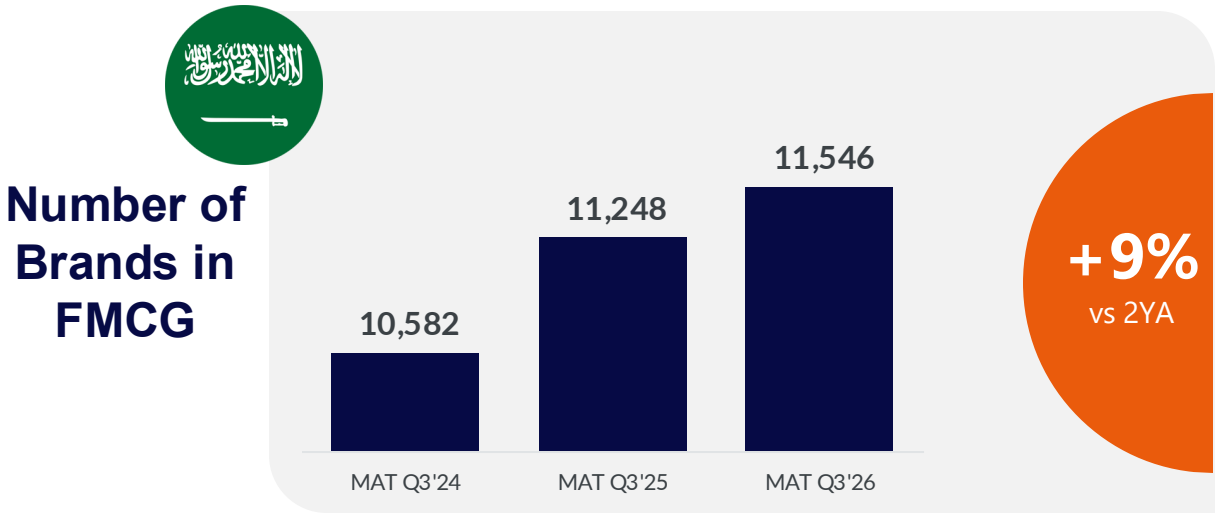




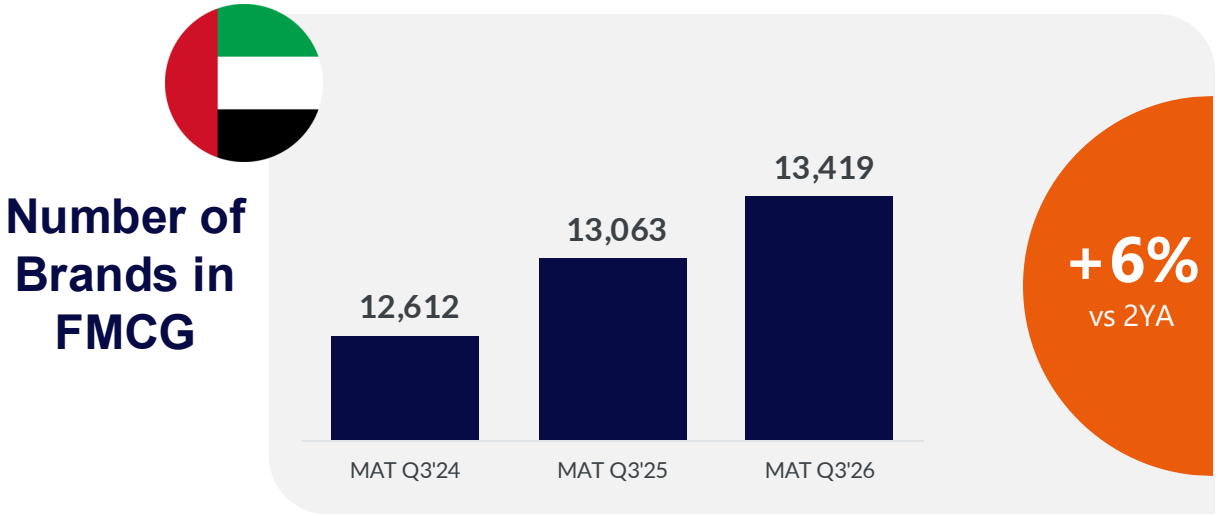
Source: GfK T&D Data Ending Sep '26
Low: Brands with 0-80% price index to their respective category
Mid: Brands with 80-120% price index to their respective category
High: Brands with 120+% price index to their respective category

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We have seen more and more brands in KSA and UAE over the last 3 years. In line with Ecommerce strong growth, we start to see more SKUs and brands in FMCG portfolio



104,449 active SKUs in MAT Q3'26
+8,289 SKUs vs 2YA



136,091 active SKUs in MAT Q3'26
+3,435 SKUs vs 2YA

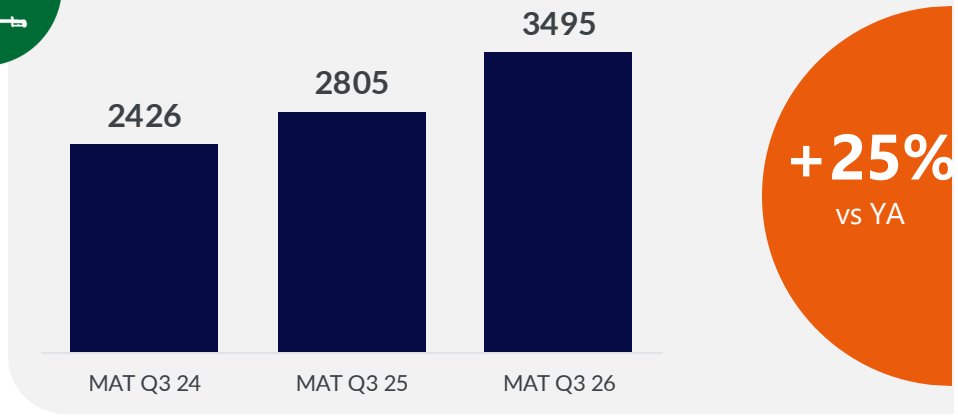
Source : NielsenIQ RMS, Total FMCG, Updated Sep 2026

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Brand and SKU proliferation accelerated across KSA and UAE, intensifying competition and expanding consumer choice.



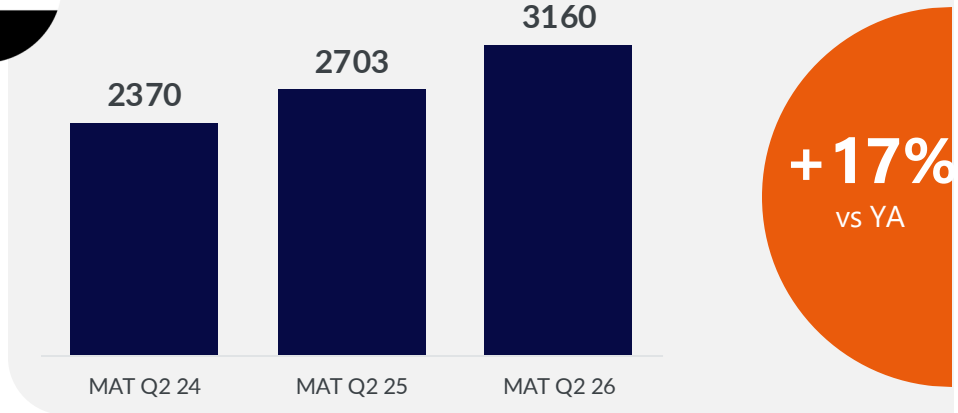
Number of Brands in T&D



56,159 active SKUs in MAT Q3 '26
+21,774 SKUs vs YA



Number of Brands in T&D



48,625 active SKUs in MAT Q3 '26
+16,176 SKUs vs YA

Source : GfK Market Intelligence | Total TCG | Updated Sep 2026

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Thank You



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