

FMCG State of Nation KSA & UAE

eCommerce, Modern Trade, Traditional Trade

Period: May 2026 Data Ending

NielsenIQ



eCommerce

Period: May 2026 Data Ending



Key Takeaways



In the last 3 months (which is entirely covering post conflict time), KSA Ecom managed to grow strong double digit at +55% while UAE continued to grow with a slower pace at +16%



Pre-conflict, the average price was in decline trend which was led by Ramadan as well. Post conflict time is still at a decline trend with -2% for UAE and -6% for KSA



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



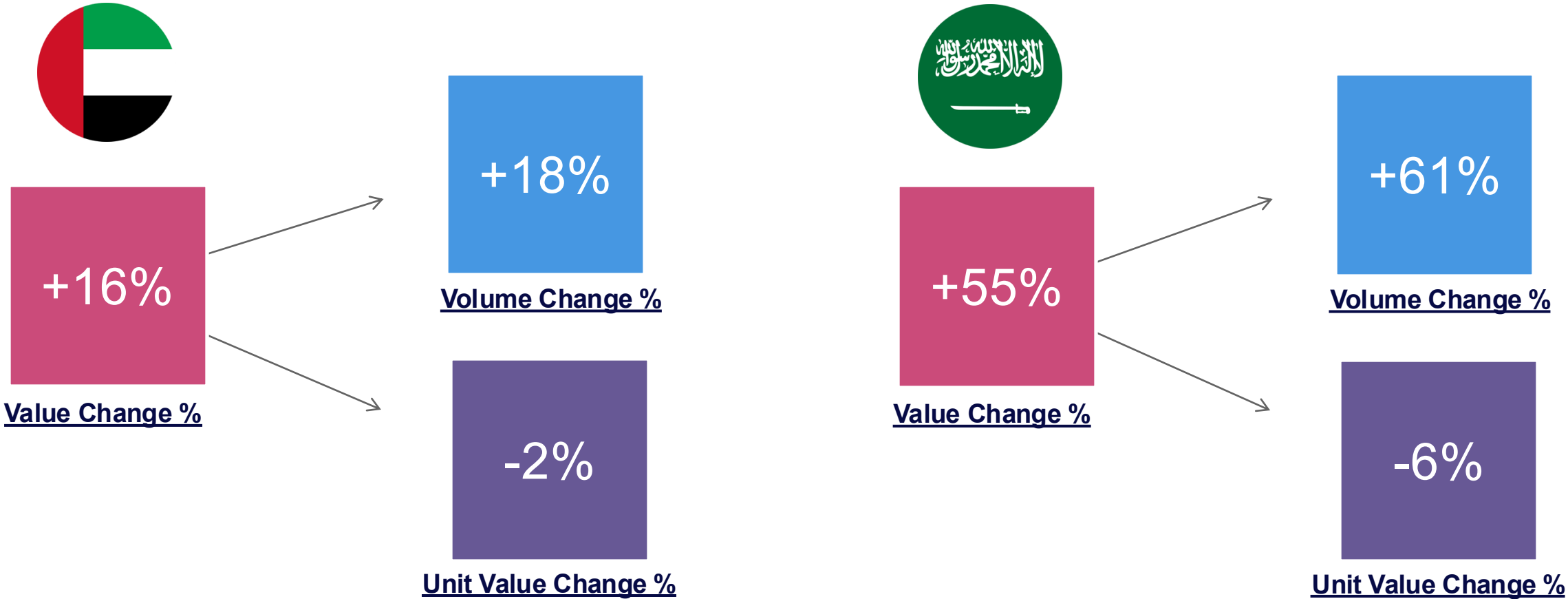
In KSA, smaller players are outperforming top players while in UAE it is a mixed bag; 31-100 is the fastest growing in Food while top 6-10 is the best performing in Non-Food



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eCommerce

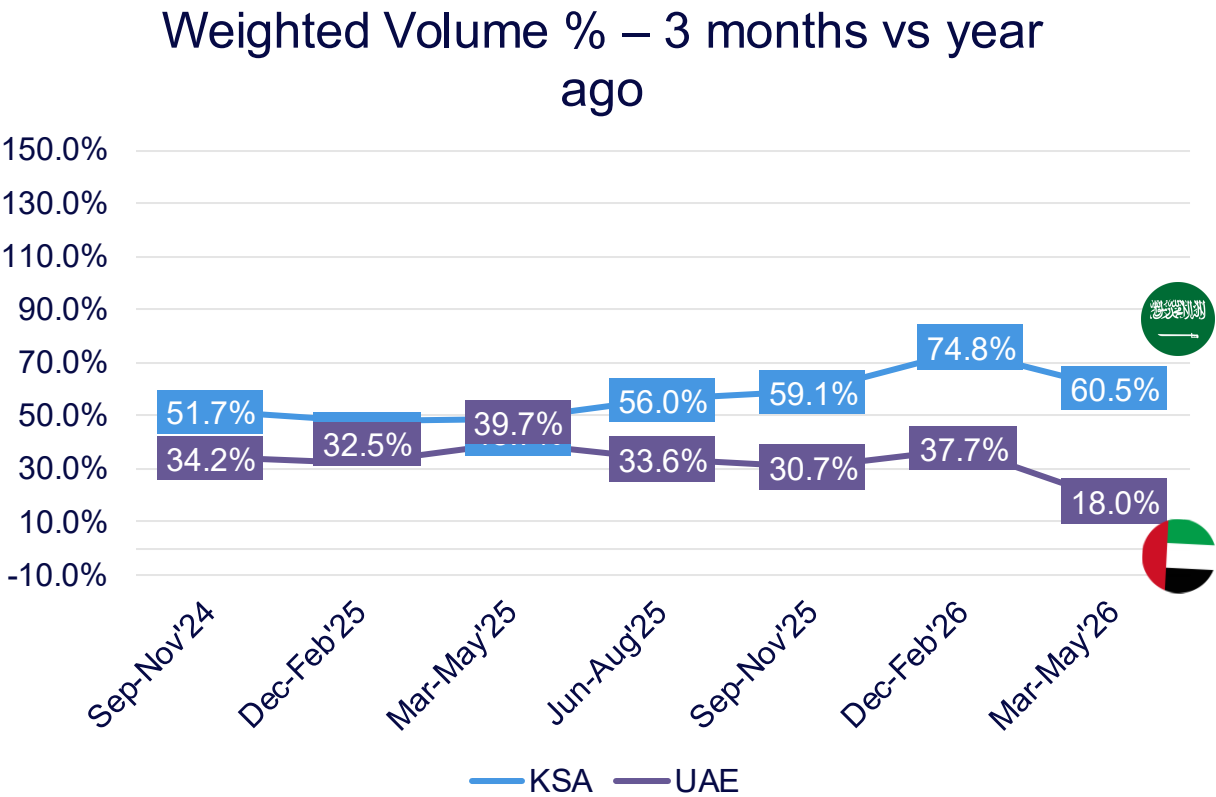
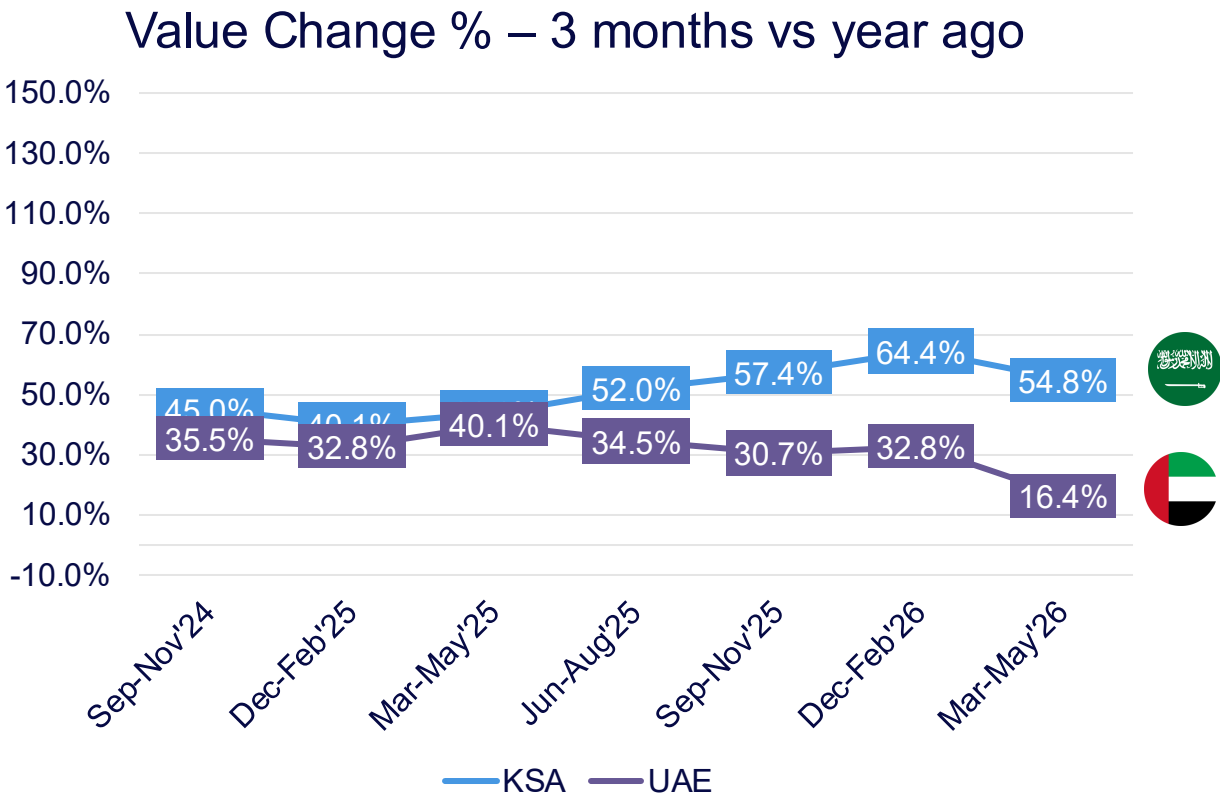
FMCG Trends - Last 3 months vs year ago



Source : NielsenIQ RMS

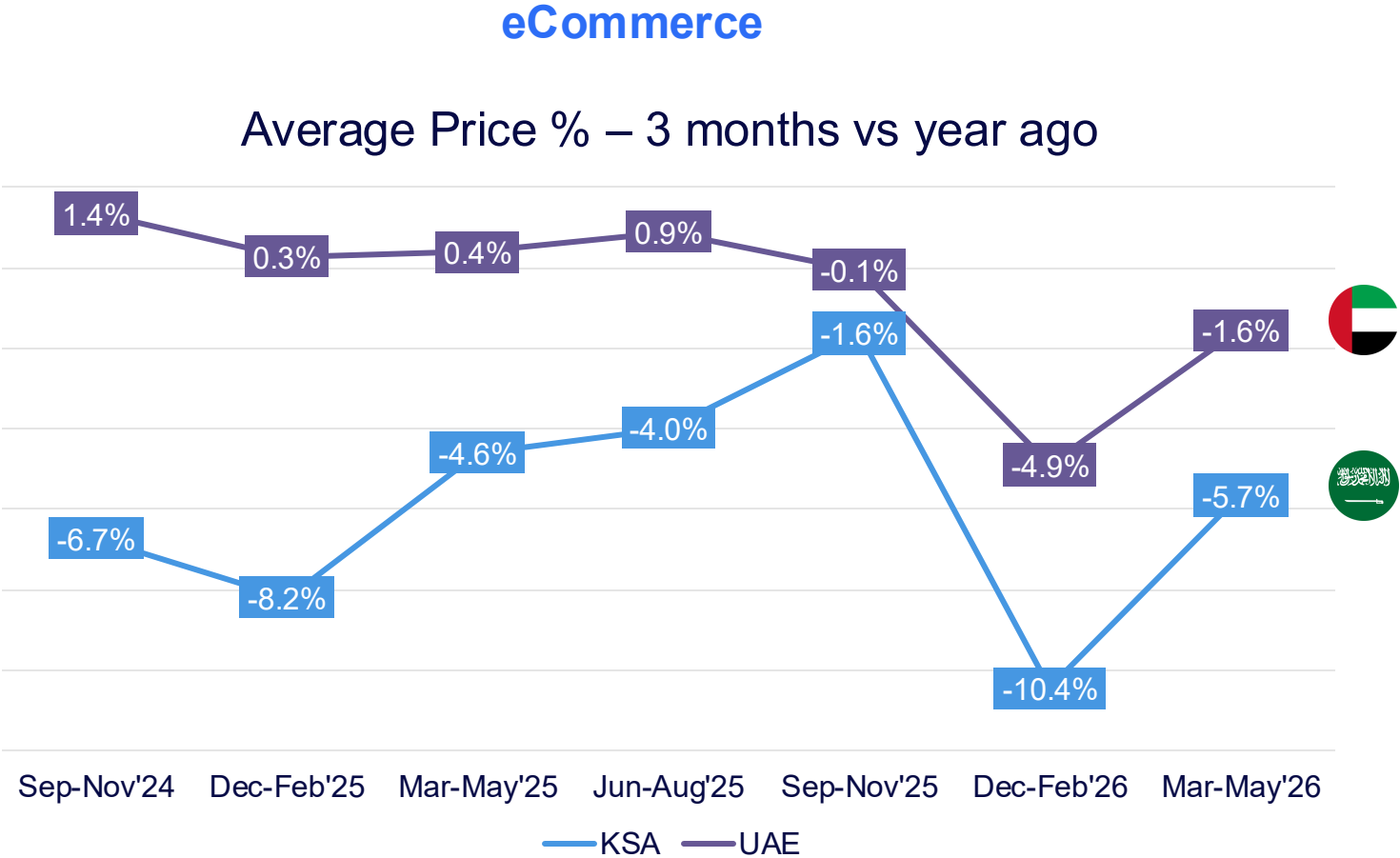
Despite the challenging situation, UAE Ecom stayed at double digit growth whereas KSA is at a similar pace

eCommerce



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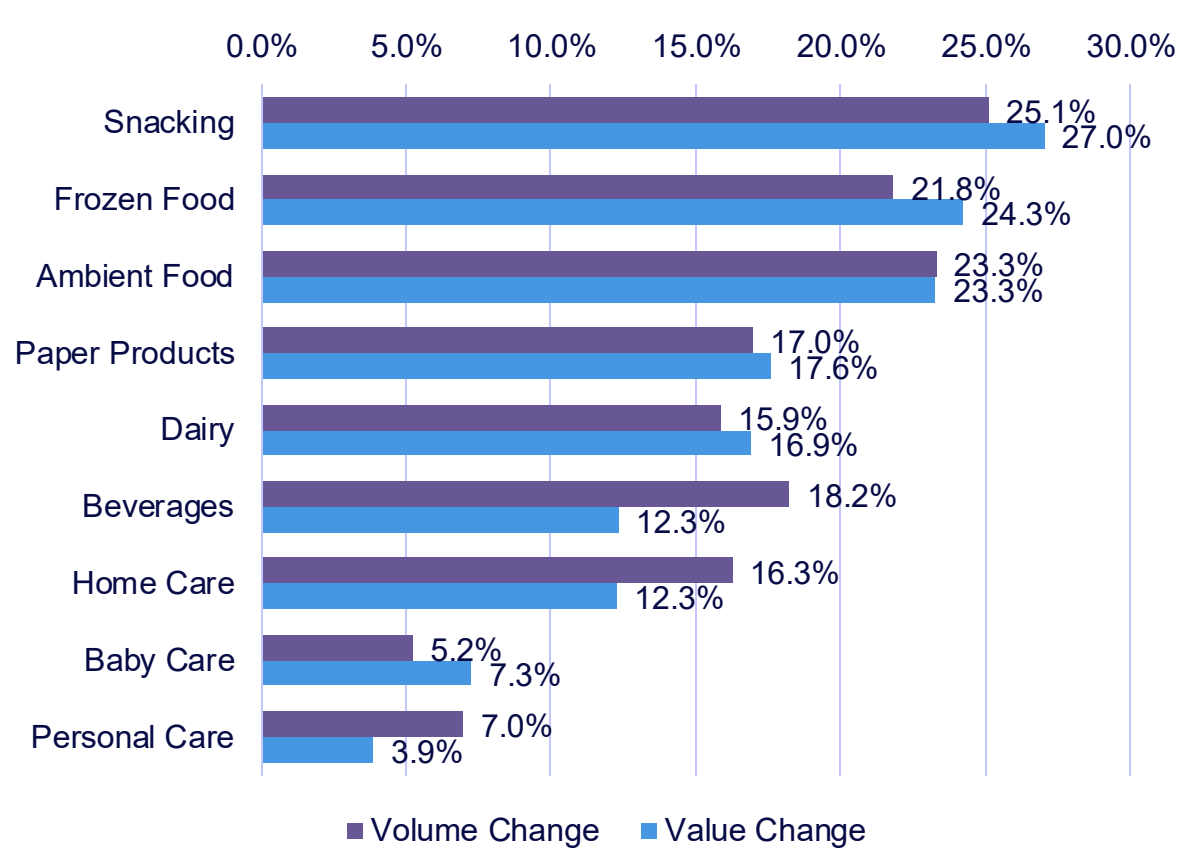
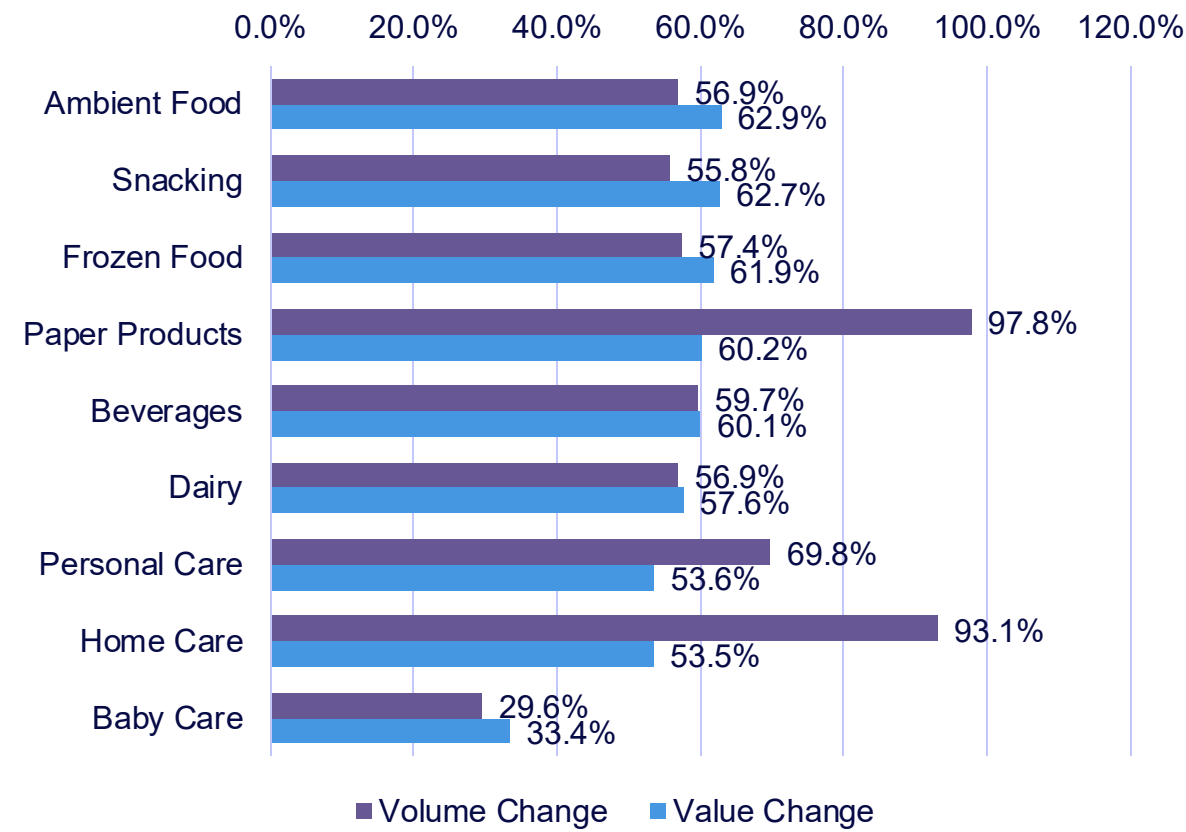
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eCommerce



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



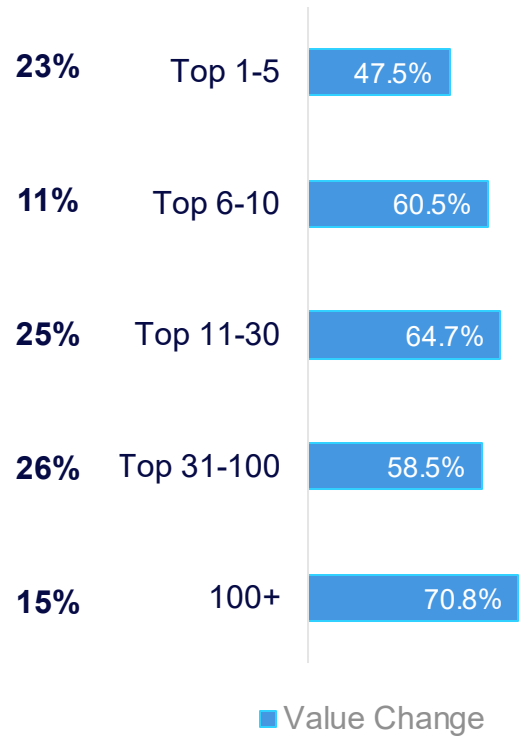
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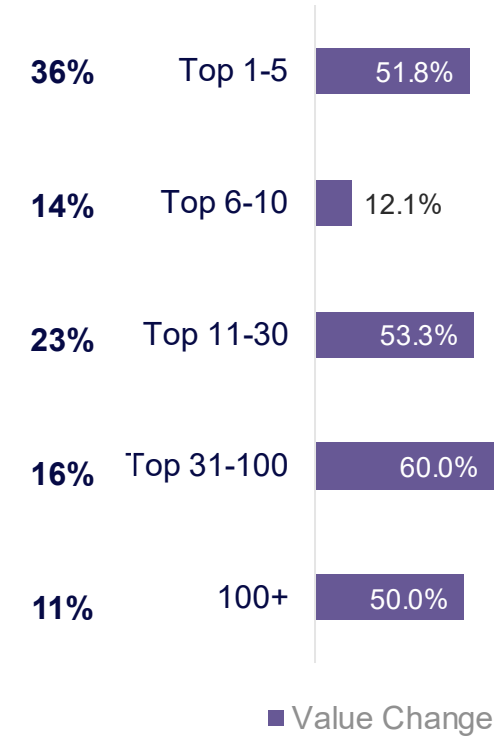


eCommerce
Last 3M vs year ago

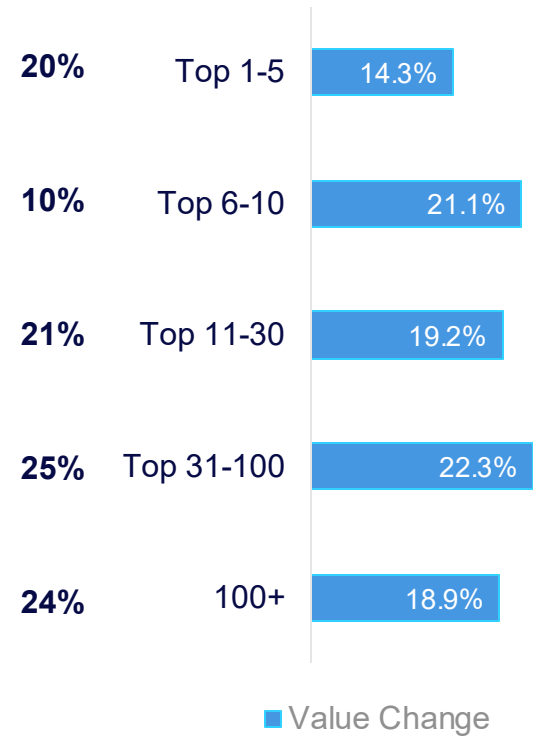
Food Manufacturers
(Value Share) & Value Change in %



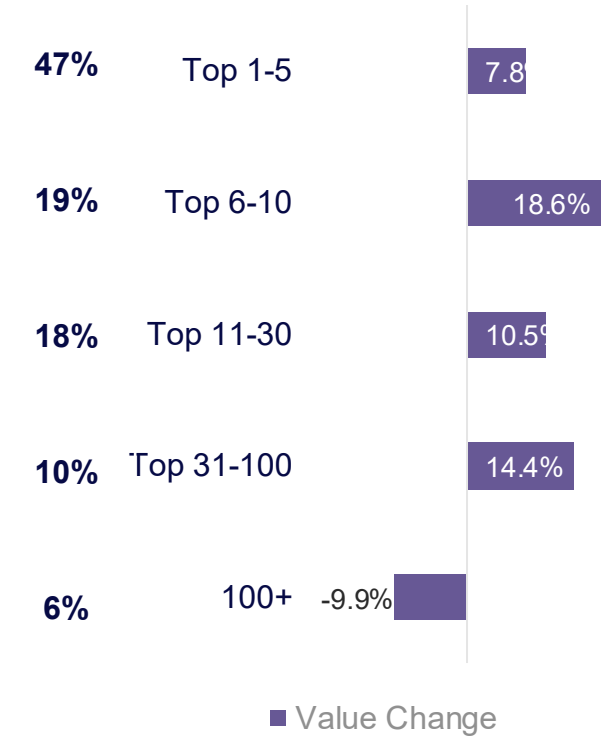
Non-Food Manufacturers
(Value Share) & Value Change in %



Food Manufacturers
(Value Share) & Value Change in %



Non-Food Manufacturers
(Value Share) & Value Change in %



Source : NielsenIQ RMS

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

Measure & activate both online & offline. NIQ can support your omnichannel strategies.

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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: May 2026 Data Ending



Key Takeaways



Modern Trade has got the biggest impact during conflict; KSA is declining at -8% while UAE is at -4% where both are driven by consumption drops



In both markets, average price change has increased; both markets are at +1%



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



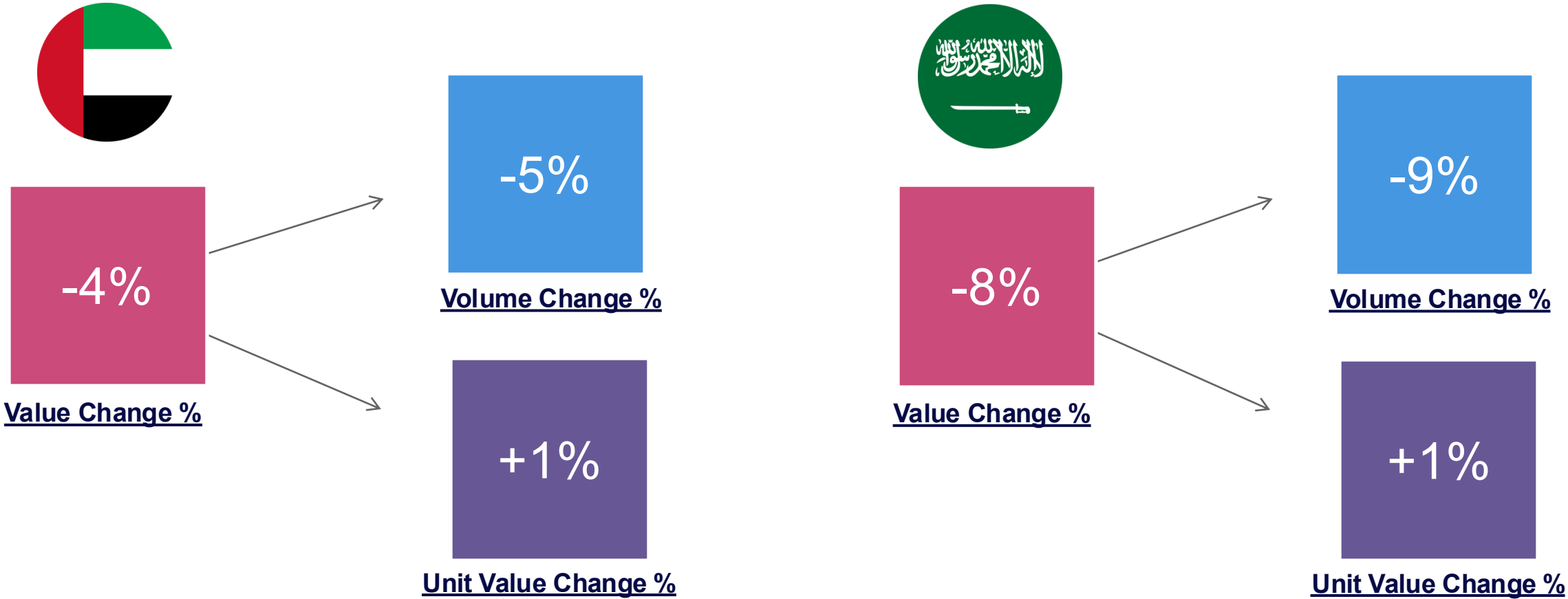
Smaller players are performing better vs top players in KSA while the mid tier is the best performing for UAE



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Modern Trade

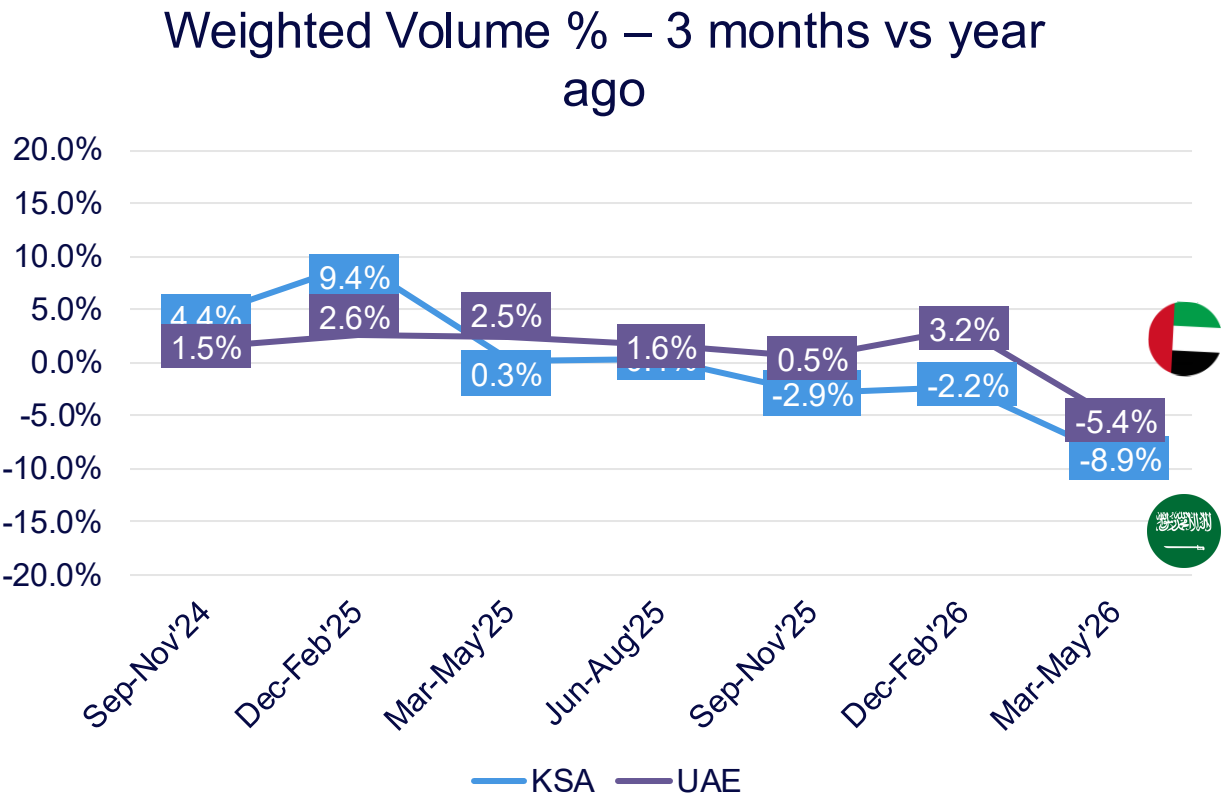
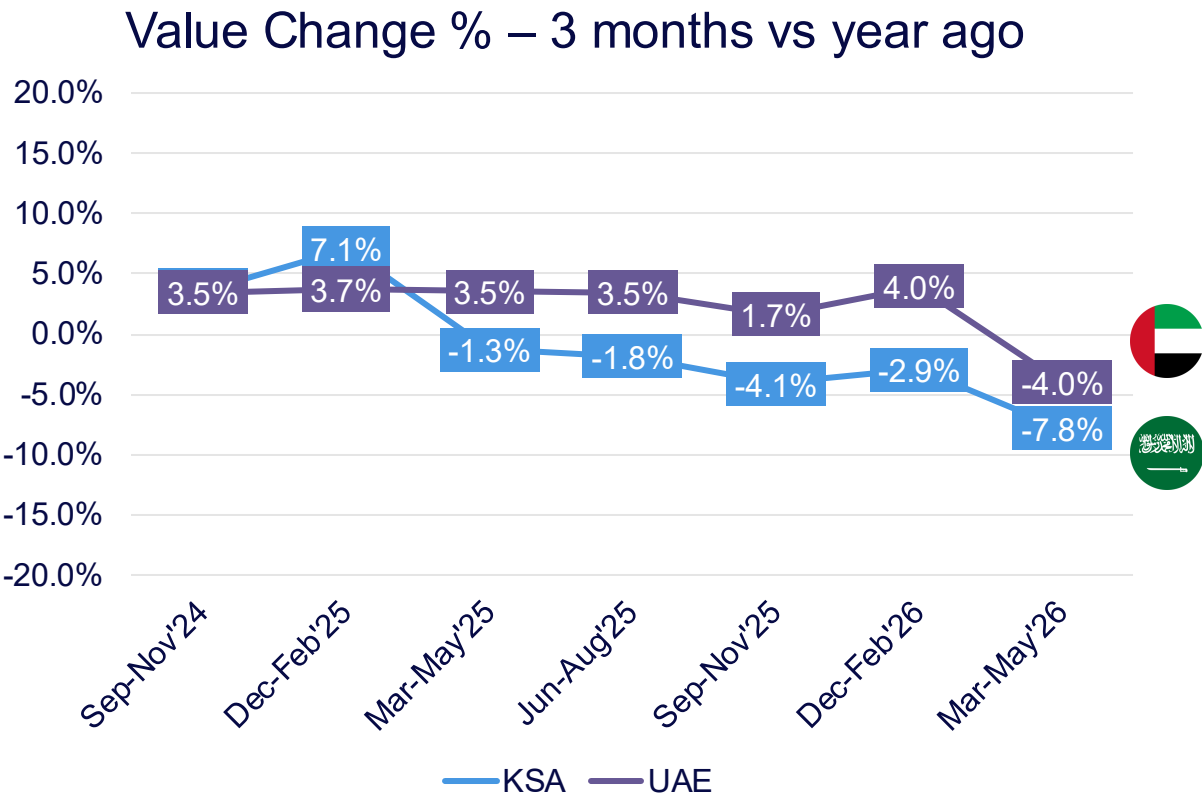
FMCG Trends - Last 3 months vs year ago



Source : NielsenIQ RMS

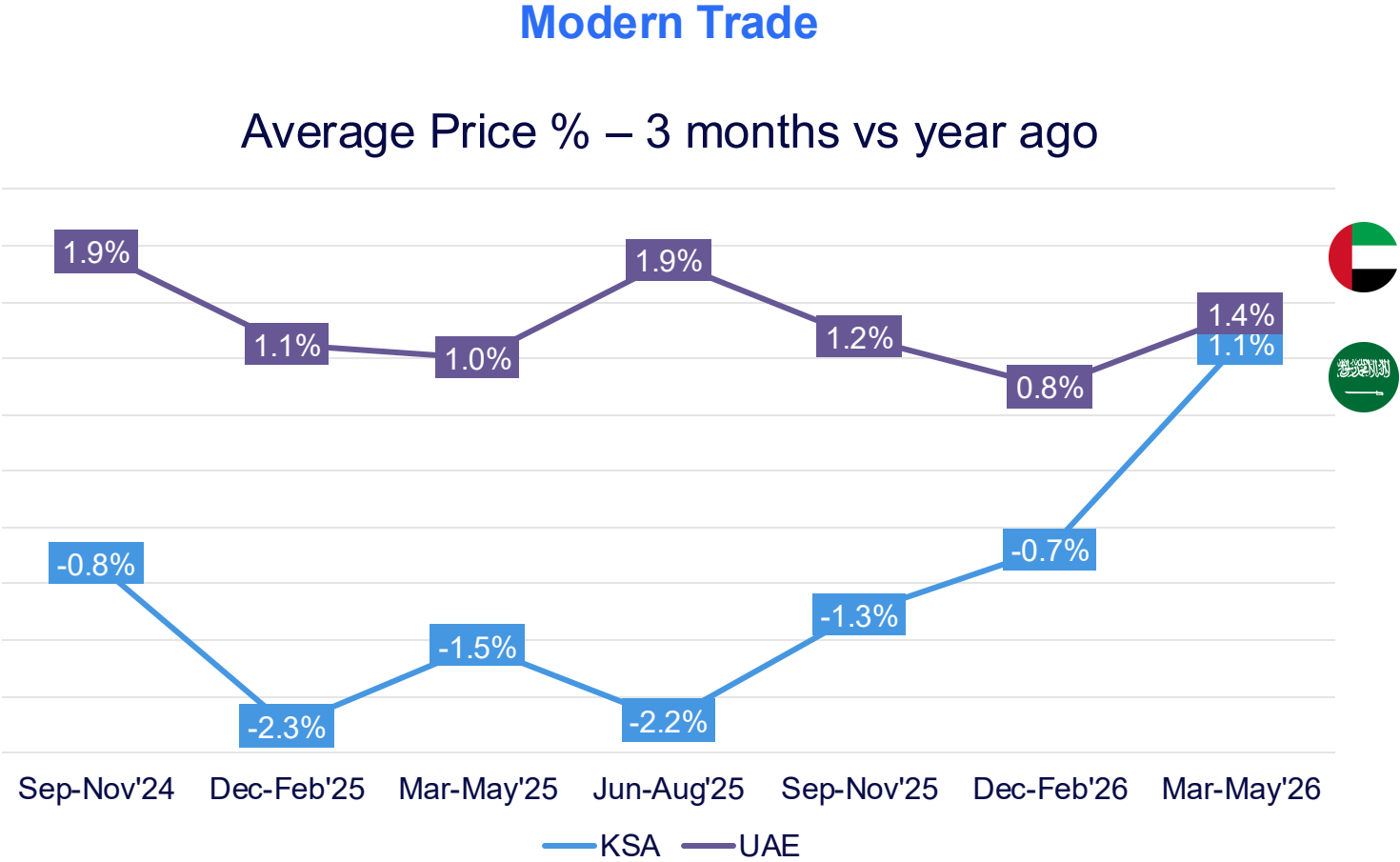
Although KSA MT had some softness pre-conflict time, the decline has accelerated while UAE growth trajectory reversed during the conflict

Modern Trade



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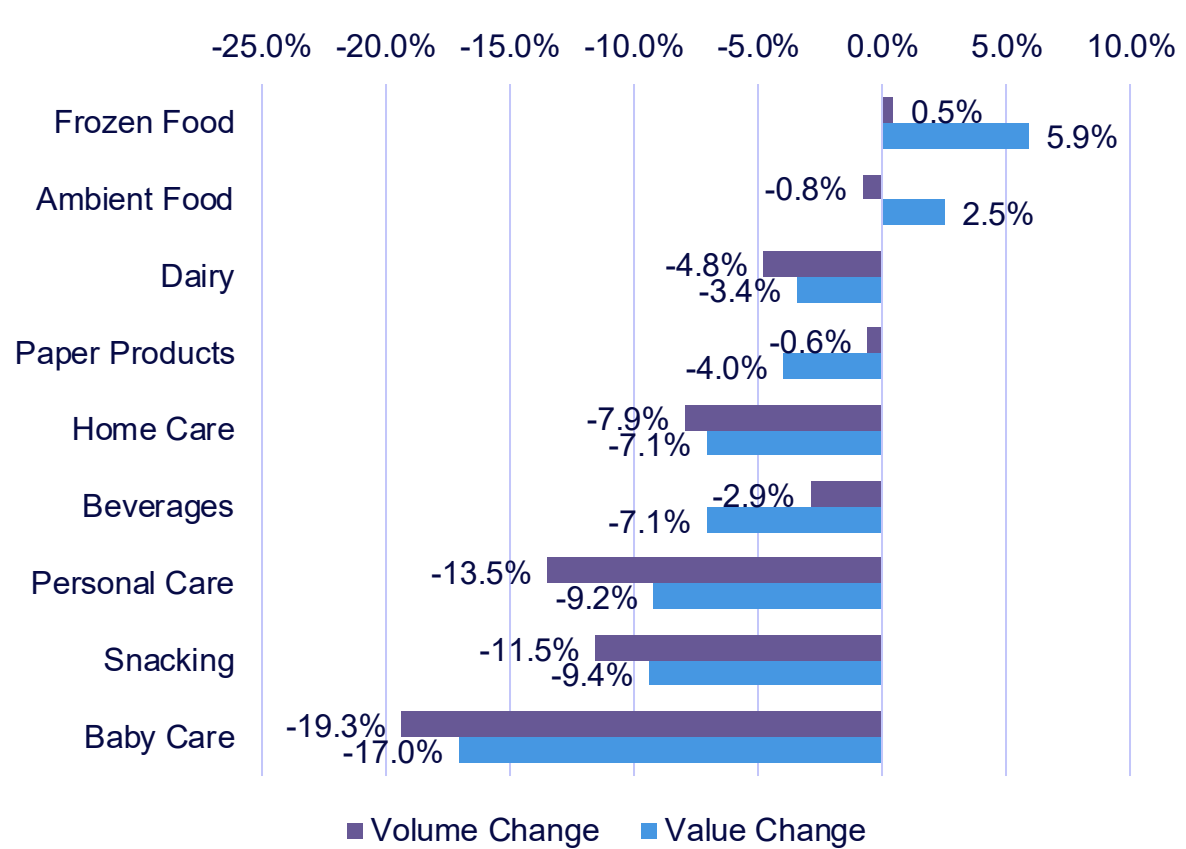
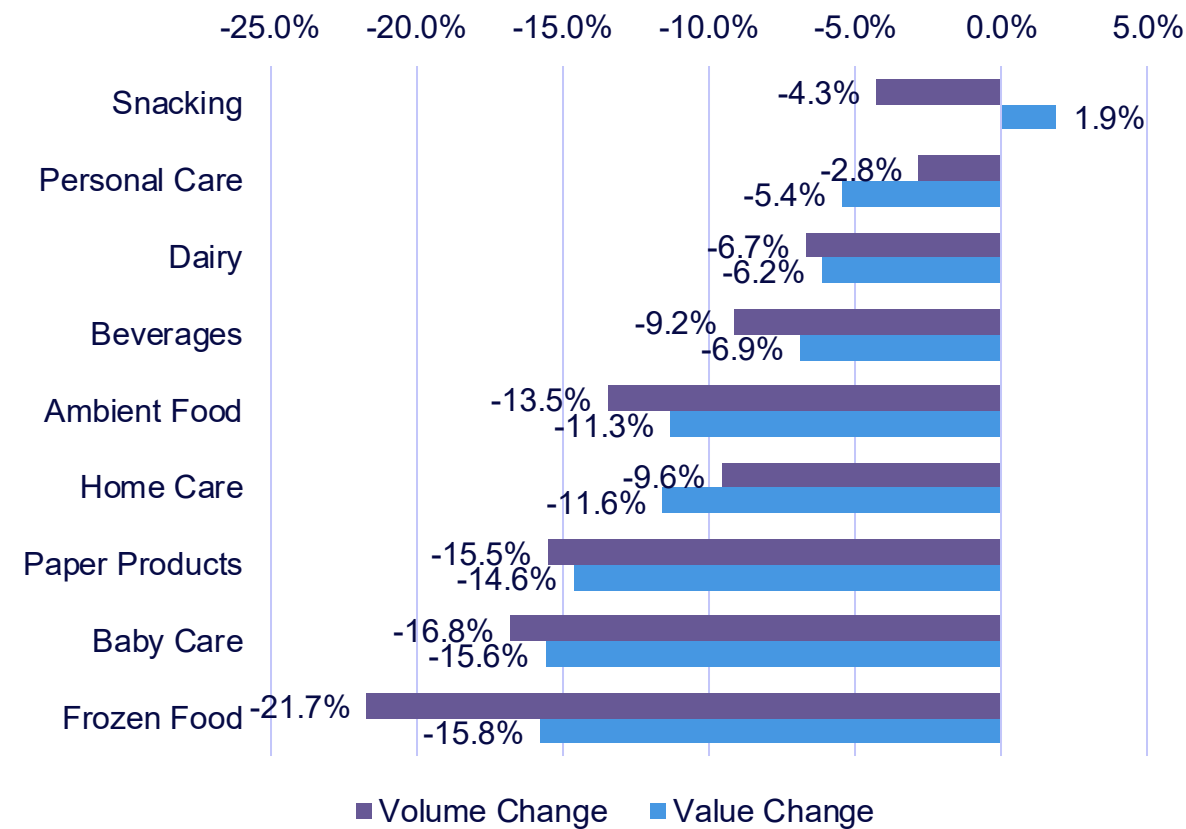
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Modern Trade

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

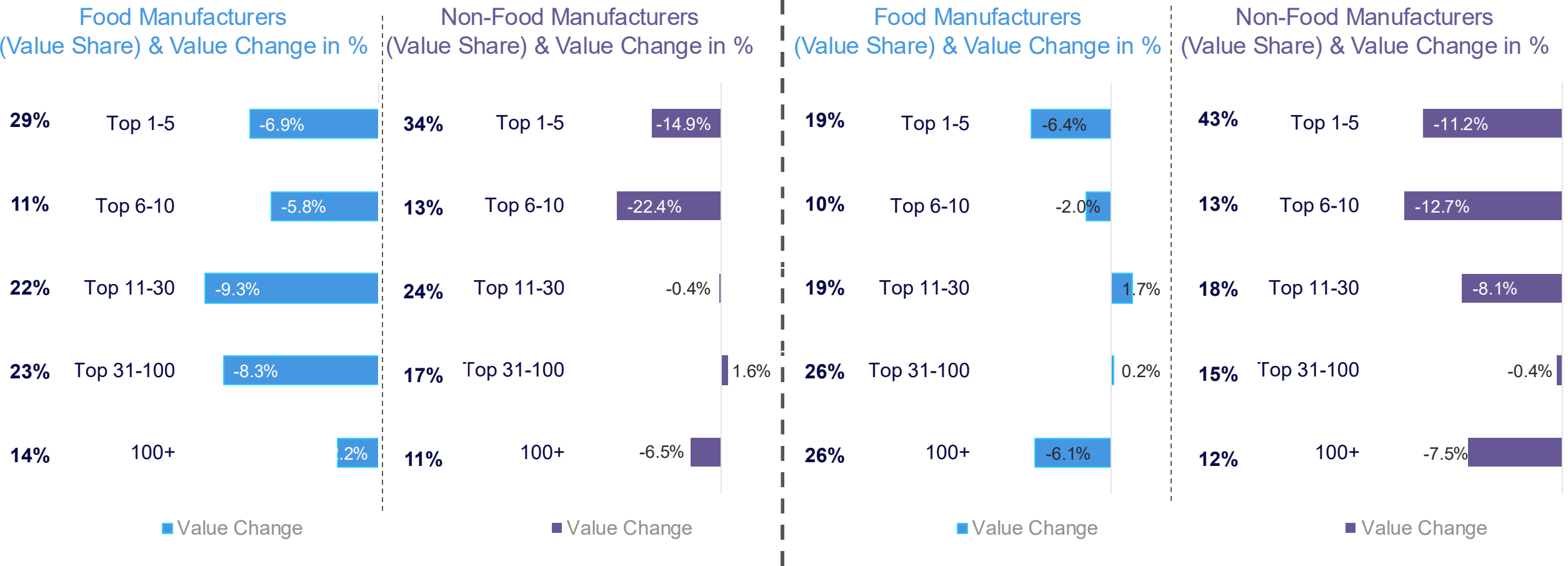


Source : NielsenIQ RMS

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: May 2026 Data Ending



Key Takeaways



Despite the challenges, UAE TT managed to continue growing double digit at +13% while KSA has some softness at witnessed a slight drop of -1%



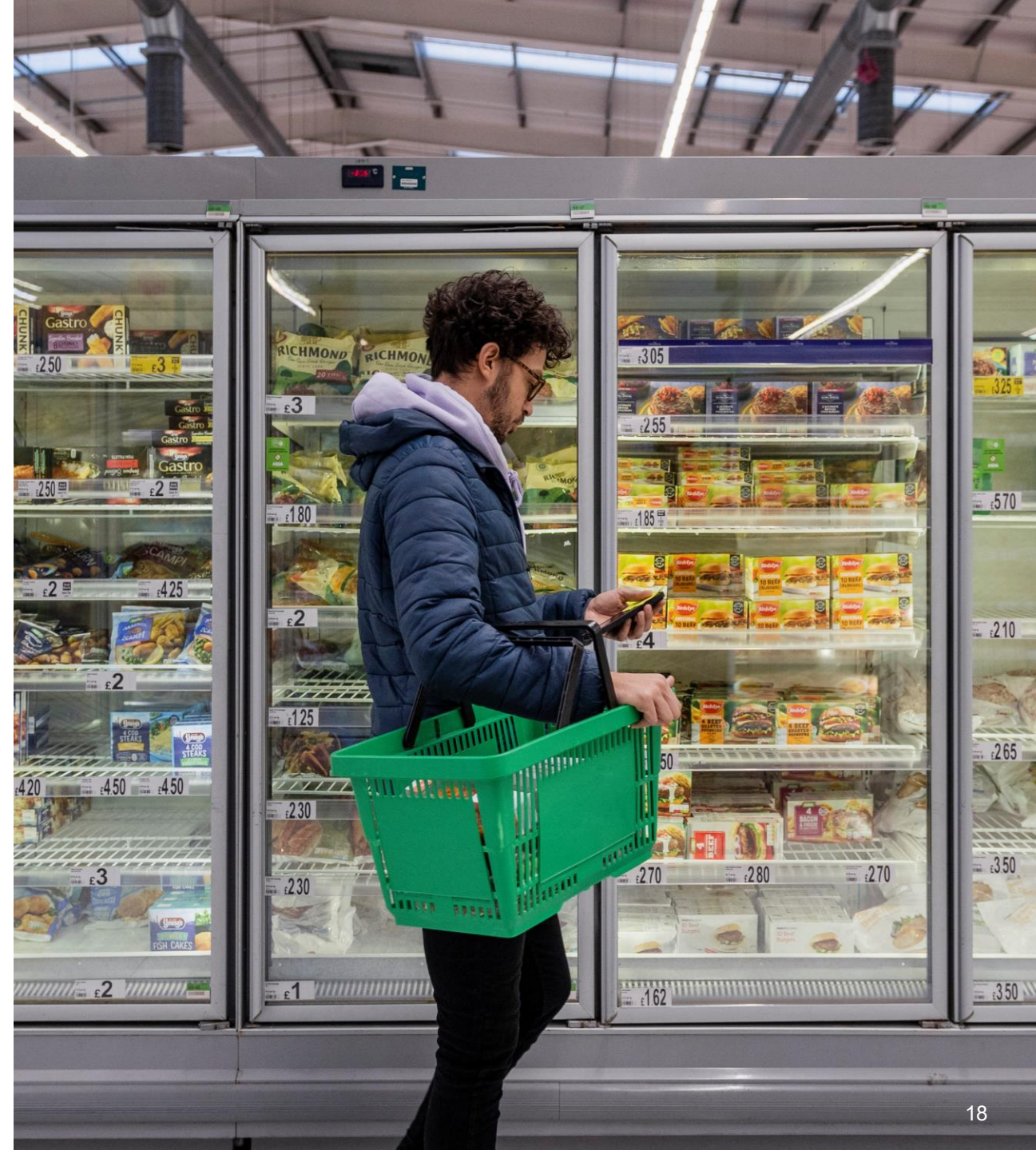
UAE's price change drop trend continues, and it is almost flat now. Similarly, KSA price drop has been slowing down and now almost flat.



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



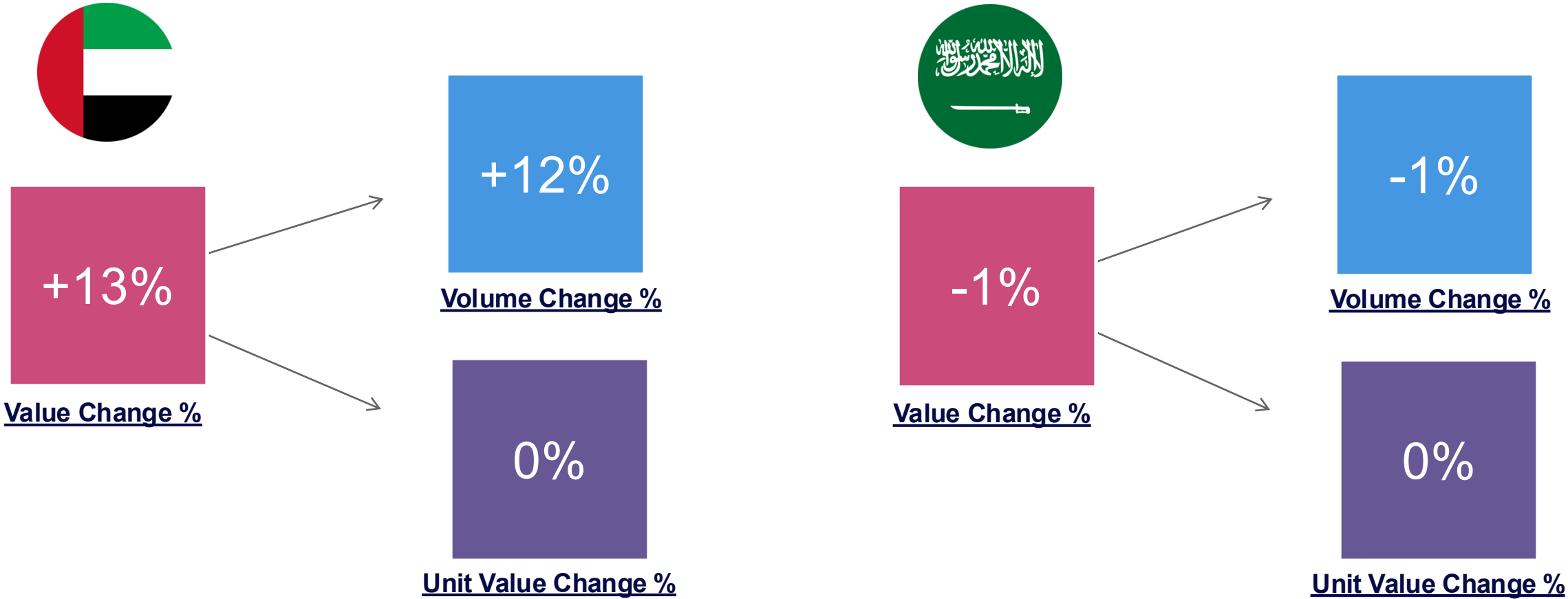
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Traditional Trade

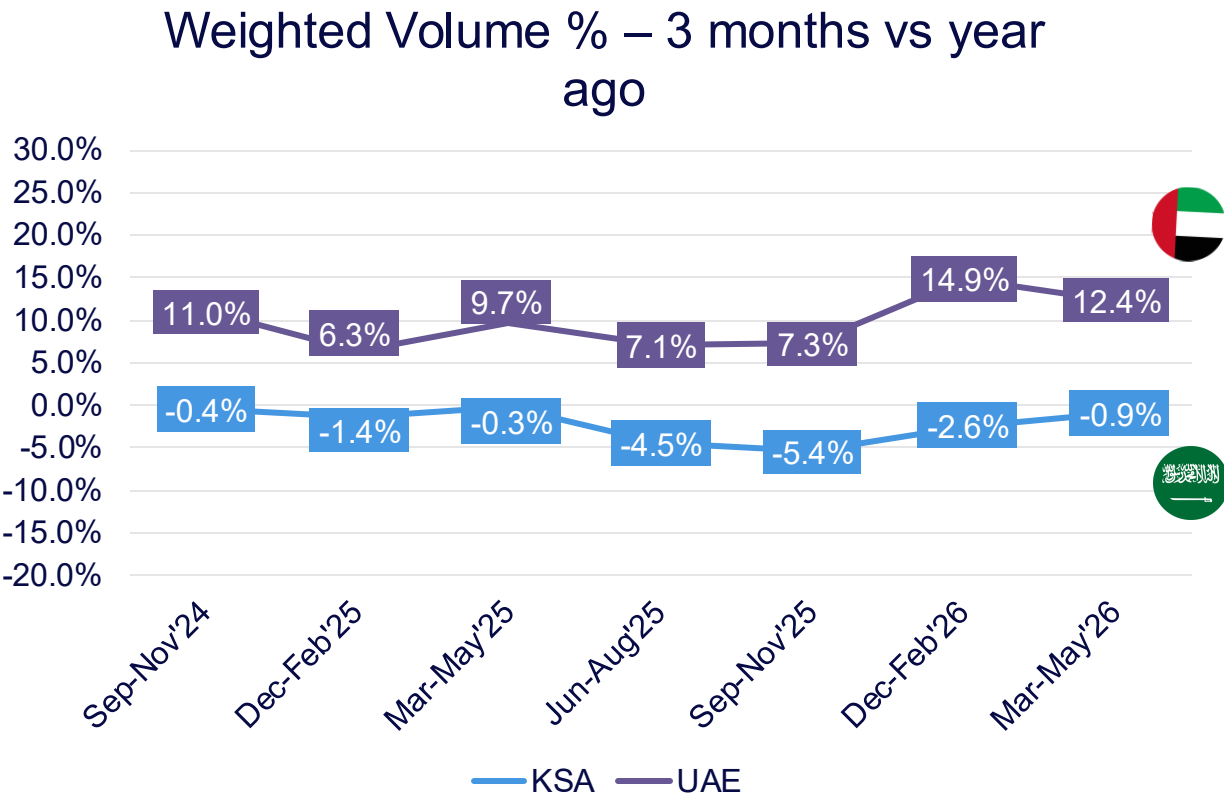
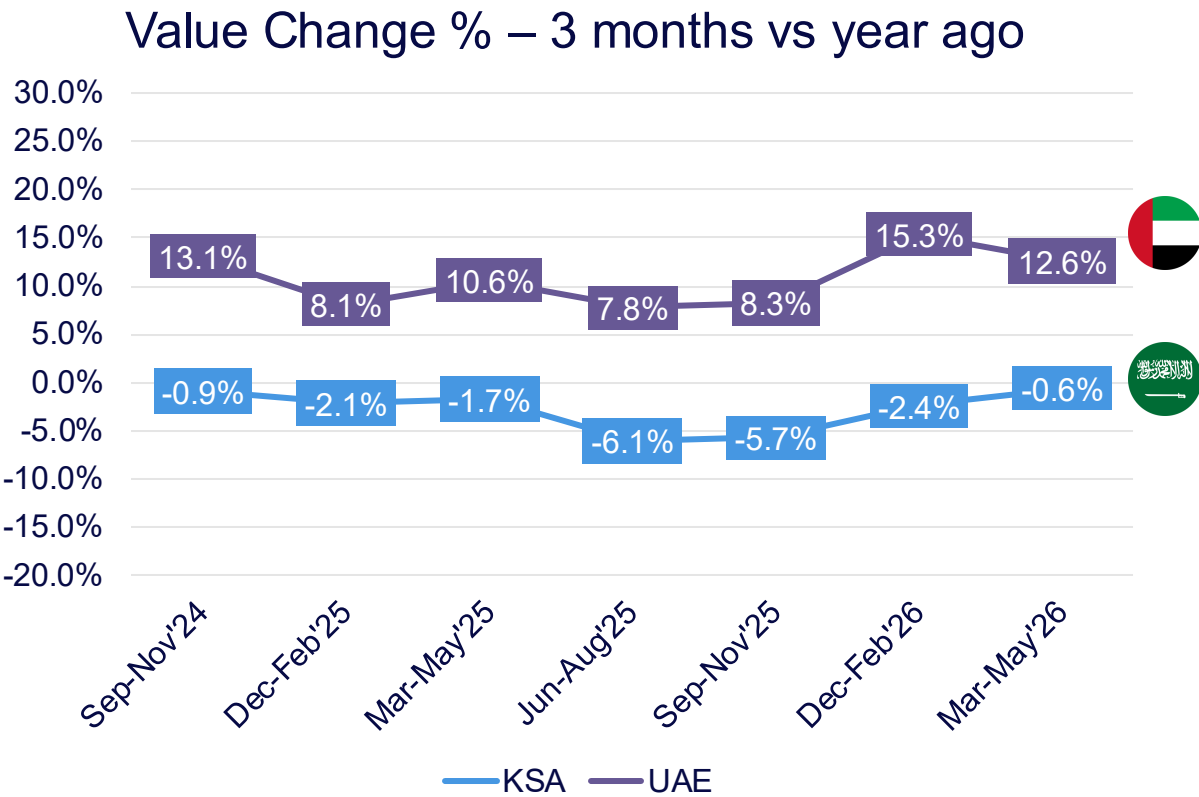
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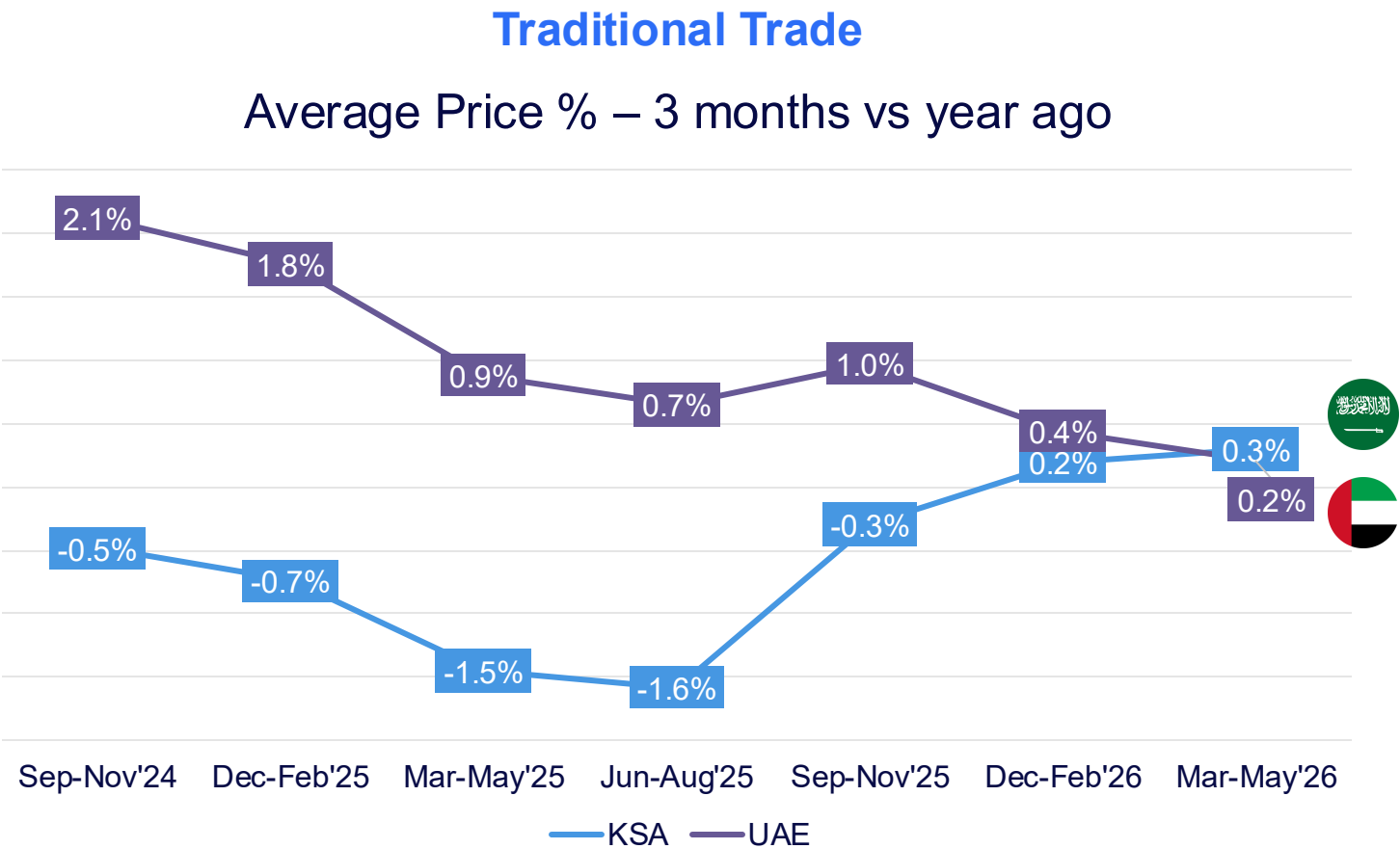
UAE TT managed to sustain its momentum during conflict while KSA drop slowed down and getting almost flat change

Traditional Trade



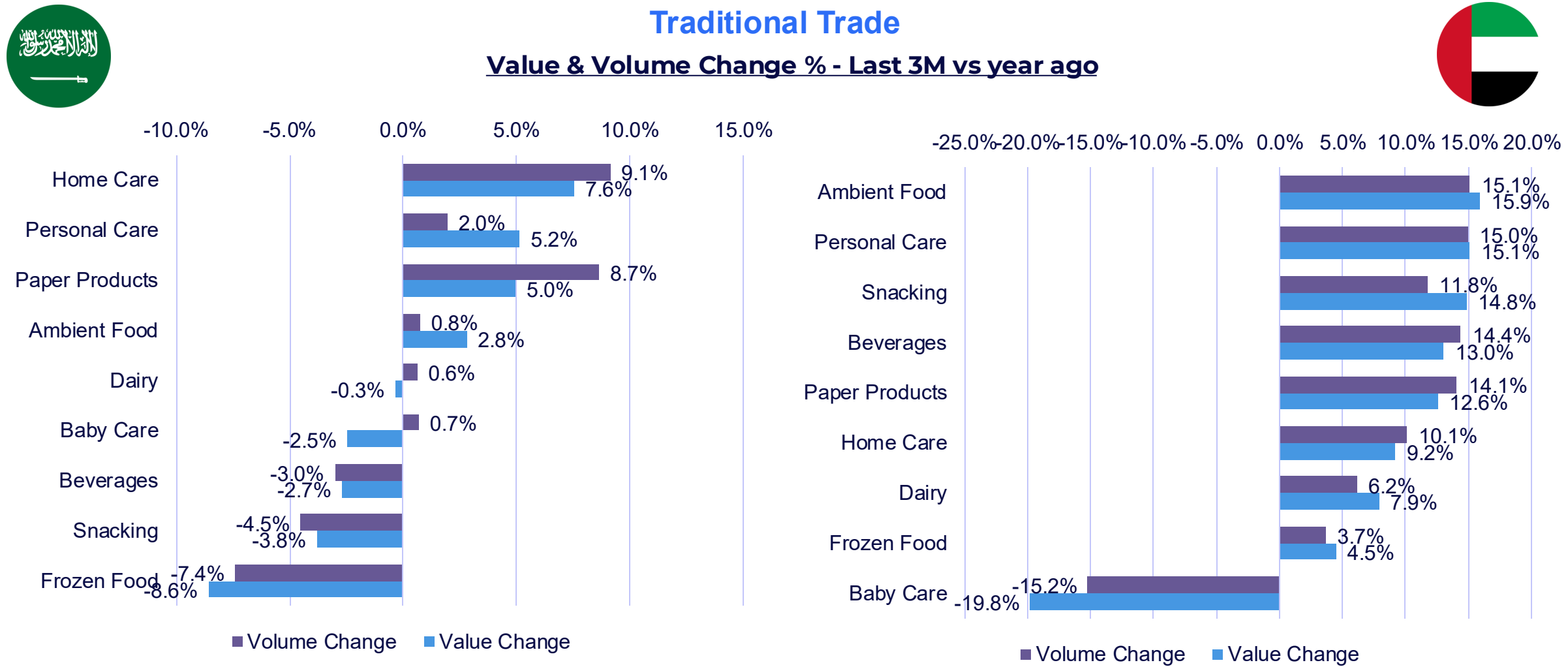
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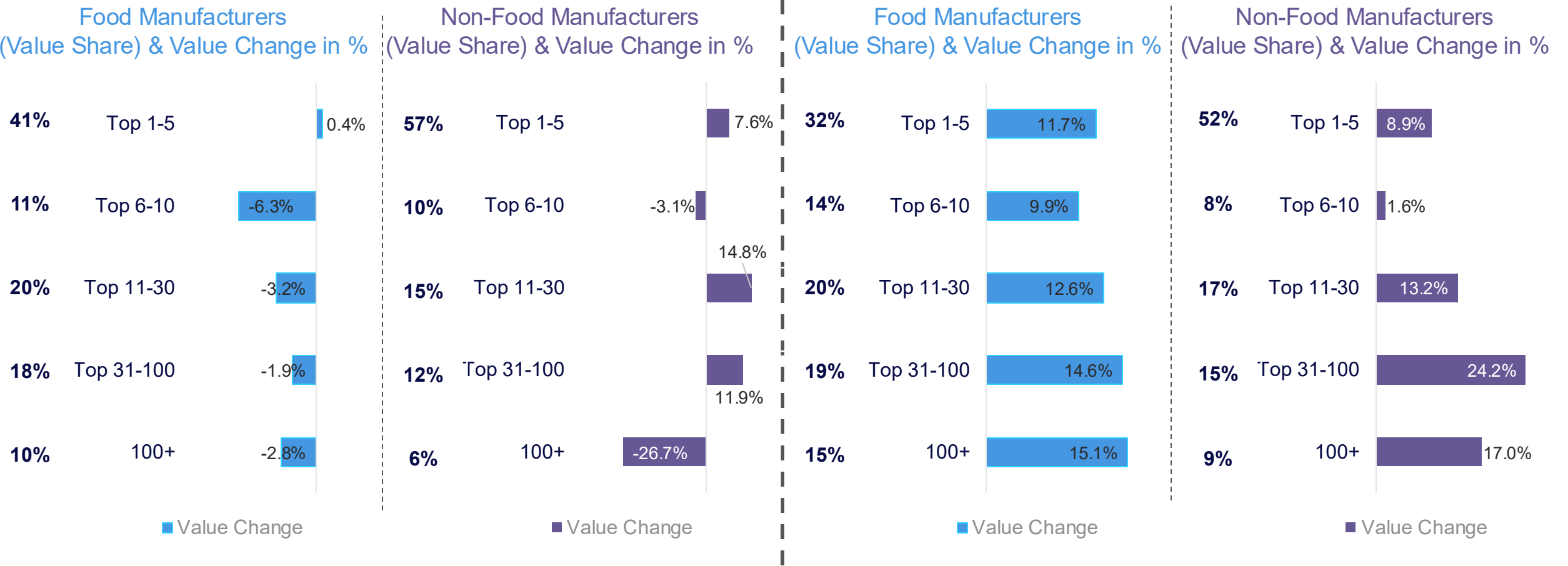


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Traditional Trade
Last 3M vs year ago



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<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!

