

Saudi Arabia Biscuit Market By Type (Crackers & Savory Biscuits, Sweet Biscuits), By Packaging (Pouches/Packets, Boxes, Cans/Jars, Others), By Sales Channel (Supermarkets/Hypermarkets, Specialist Retailers, Departmental Stores, Online, Others) By Region, By Competition Forecast & Opportunities, 2018-2028F

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Abstracts

Saudi Arabia Biscuit Market has valued at USD 449.76 million in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 10.23% through 2028. Saudi Arabia's biscuit industry has experienced significant growth in recent years, reflecting the nation's evolving consumer preferences and economic development. Biscuits, often referred to as 'biscuits' in the region, have become a staple in Saudi households and are enjoyed with tea or coffee, especially during the traditional Arabic coffee gatherings.

Local and international brands compete in this market, offering a wide variety of biscuits to cater to diverse tastes. Traditional favorites like ma'amoul (shortbread filled with dates or nuts) and petit fours remain popular, but newer, innovative flavors and textures have also gained ground.

As a predominantly Muslim country, Saudi Arabia follows halal dietary guidelines, which have influenced the ingredients and production processes used in biscuit manufacturing. This ensures that biscuits comply with Islamic dietary laws and are permissible for consumption by Muslims.

The biscuit industry has benefited from Saudi Arabia's thriving hospitality sector and its

commitment to promoting local industries, with many hotels and restaurants using locally produced biscuits. Moreover, the government's diversification efforts, such as Vision 2030, have encouraged the growth of domestic industries, including the biscuit market. As a result, Saudi Arabia's biscuit industry is poised for continued expansion, both domestically and for potential export opportunities to neighboring countries and beyond.

Key Market Drivers

Cultural Preferences and Traditions

Saudi Arabia has a rich culinary tradition with a preference for sweet treats, especially during special occasions and festivals. Biscuits, locally known as 'biscuits,' are deeply ingrained in the Saudi culture. They are often enjoyed during the daily ritual of drinking Arabic coffee (qahwa) or tea. Traditional biscuit favorites like ma'amoul, which are shortbread cookies filled with dates or nuts, and petit fours, a variety of small, delicate pastries, have been enjoyed for generations. The cultural significance of biscuits as a symbol of hospitality and a gesture of warmth and welcome makes them a vital part of Saudi Arabian cuisine. These cultural preferences and traditions have been the driving force behind the consistent demand for biscuits in the country.

Rapid Economic Growth and Urbanization

Saudi Arabia has undergone significant economic development over the past few decades, transforming from an oil-dependent economy to a more diversified one as part of its Vision 2030 plan. This economic growth has led to increased urbanization, higher disposable incomes, and changing lifestyles among the population. As a result, consumers in Saudi Arabia have become more brand conscious and demanding of high-quality, convenient, and diverse food products, including biscuits. With greater access to international brands and a wide range of choices, consumers are exploring various biscuit options, from traditional to innovative flavors and textures. The urban lifestyle, with busy work schedules and on-the-go snacking, has also fueled the demand for convenient biscuit products, further propelling the industry's growth.

Halal Certification and Compliance

As a predominantly Muslim country, Saudi Arabia follows strict halal dietary guidelines. Halal, meaning 'permissible' in Arabic, refers to food and beverages that comply with Islamic dietary laws. This includes the sourcing of ingredients, food preparation, and the

overall production process. The Saudi Arabian biscuit industry is no exception, with a strong emphasis on ensuring that biscuits are produced in accordance with halal standards. This commitment to halal certification is not only crucial for domestic consumption but also opens the doors for export opportunities to other Muslim-majority countries. Biscuit manufacturers in Saudi Arabia must adhere to halal requirements, and this has become a driving factor in shaping the industry and ensuring that all biscuits produced are compliant with Islamic dietary laws, expanding their market reach and appeal.

Government Initiatives and Vision 2030

The Saudi Arabian government has been actively promoting the growth of domestic industries as part of its Vision 2030 plan, which seeks to diversify the nation's economy and reduce its dependence on oil revenue. The biscuit industry is no exception to these initiatives, as it aligns with the government's goals to boost local manufacturing and create jobs. The government's support, such as financial incentives, regulatory reforms, and infrastructure development, has encouraged investment in the biscuit sector. Additionally, Vision 2030's emphasis on increasing non-oil exports has led to greater interest in exporting Saudi-made biscuits to international markets. As a result, the biscuit industry in Saudi Arabia is experiencing growth and expansion, creating opportunities for both established manufacturers and new entrants.

In conclusion, the Saudi Arabian biscuit industry is driven by a combination of cultural preferences, economic growth, adherence to halal standards, and government initiatives. The rich cultural traditions, economic development, and changing lifestyles of the population have led to a growing demand for biscuits. Ensuring that these biscuits comply with halal dietary guidelines not only caters to the local market but also opens doors for exports to a broader Muslim-majority audience. Furthermore, government initiatives, such as Vision 2030, have created a favorable environment for the industry's growth. These four drivers collectively contribute to the ongoing evolution and success of the biscuit industry in Saudi Arabia.

Key Market Challenges

Market Competition and International Brands

The Saudi Arabian biscuit industry faces stiff competition from international brands and products. While the demand for biscuits in the country is high, many consumers have a preference for well-established foreign brands. These international brands often have a

long-standing reputation for quality and variety, which can make it challenging for local producers to capture a significant market share. The presence of international brands also means that local producers must continually innovate and maintain high standards to remain competitive. This intense competition can be a barrier for smaller, domestic manufacturers trying to establish themselves in the market.

Changing Consumer Preferences and Health Concerns

As Saudi Arabia undergoes economic development and urbanization, consumer preferences for food products, including biscuits, are evolving. There is a growing awareness of health and nutrition, and many consumers are becoming more health-conscious, looking for products with lower sugar content, whole grains, and natural ingredients. This shift in preferences poses a challenge for the traditional biscuit industry, which often relies on sweet, indulgent flavors and ingredients. Meeting these changing demands while maintaining the essence of traditional biscuit flavors is a balancing act that local manufacturers must navigate. Adapting to these evolving consumer preferences and addressing health concerns can be a significant challenge for the industry.

Supply Chain and Ingredient Sourcing

The biscuit industry in Saudi Arabia heavily relies on the availability of raw materials and ingredients. However, the country's harsh climate and limited agricultural production can pose challenges in sourcing certain ingredients. For example, wheat, a key ingredient in many biscuit recipes, is not grown in significant quantities in Saudi Arabia due to its arid environment. This necessitates the importation of wheat and other raw materials, which can lead to supply chain disruptions, cost fluctuations, and vulnerability to international market conditions. The industry's dependence on imported ingredients makes it susceptible to global factors, such as fluctuations in international commodity prices and trade restrictions.

Regulatory and Halal Compliance

While adherence to halal standards is a driver for the Saudi Arabian biscuit industry, it also presents challenges, particularly in terms of compliance with complex regulatory requirements. The strict regulations surrounding the halal certification process can be time-consuming and costly for biscuit manufacturers. Ensuring that every ingredient and production process adheres to halal guidelines requires meticulous oversight and documentation. Additionally, there may be occasional changes or updates in halal

standards that manufacturers need to stay abreast of, adding to the complexity of maintaining compliance. Failure to meet these requirements can result in a loss of consumer trust and legal repercussions, so manufacturers must invest in ensuring that their products remain halal.

In conclusion, the Saudi Arabian biscuit industry faces challenges related to market competition, evolving consumer preferences, ingredient sourcing, and regulatory compliance. The industry's competitiveness with international brands, changing consumer demands, the dependence on imported ingredients, and the need to navigate complex halal certification processes all present hurdles for local manufacturers. Overcoming these challenges requires innovation, adaptability, and a commitment to quality and compliance with both cultural and regulatory standards. Addressing these issues is vital for the continued growth and success of the biscuit industry in Saudi Arabia.

Key Market Trends

Health-Conscious Biscuits

One notable trend in the Saudi biscuit market is the growing demand for healthier biscuit options. As consumers become more health-conscious and aware of the nutritional content of the food they consume, there is a shift towards biscuits that are lower in sugar, salt, and saturated fats. Manufacturers are responding by introducing biscuits with healthier ingredients, such as whole grains, seeds, and natural sweeteners. These biscuits cater to consumers looking for guilt-free indulgence and are marketed as a better-for-you snack option. Additionally, there is a focus on providing gluten-free and allergen-free options to meet the dietary needs of a broader audience.

This trend aligns with global concerns about obesity and lifestyle diseases, and it reflects Saudi Arabia's commitment to improving public health. Biscuit manufacturers are reformulating recipes to meet these demands, and as a result, the market is witnessing the emergence of a variety of 'healthier' biscuits that are also delicious and satisfying.

Flavor Innovation and Fusion

To cater to diverse consumer tastes and preferences, the biscuit industry in Saudi Arabia is experiencing a trend towards flavor innovation and fusion. Traditional flavors like dates, cardamom, and pistachio are still popular, but there is a growing appetite for

unique and exciting flavor combinations. Manufacturers are experimenting with bold and exotic flavors, such as saffron, rosewater, and even international tastes like chocolate and caramel.

This trend is driven by a desire to differentiate products and create a sense of novelty. It is also influenced by the cosmopolitan nature of Saudi society, with a diverse population that appreciates a variety of global cuisines. As a result, biscuit brands are introducing fusion flavors that blend local and international influences, creating a sense of excitement and adventure for consumers. Flavor innovation is a powerful tool for attracting new customers and maintaining the interest of loyal ones.

E-Commerce and Online Sales

Like many other industries, the biscuit sector in Saudi Arabia is experiencing the digital transformation of retail. With the widespread use of smartphones and increasing internet penetration, e-commerce has become a prominent sales channel for biscuits. Consumers are opting for the convenience of online shopping, and this trend has accelerated, especially in light of the COVID-19 pandemic, which underscored the importance of e-commerce for businesses and consumers alike.

Biscuit manufacturers and retailers are investing in user-friendly websites and mobile apps to facilitate online purchases. Additionally, they are implementing various digital marketing strategies to attract online shoppers. This includes using social media, influencer marketing, and online advertising to engage with customers. The ease of online ordering and home delivery services has opened new avenues for reaching a broader customer base, including those in remote areas. As a result, e-commerce is poised to play a significant role in the future of the Saudi biscuit market.

Sustainability and Corporate Responsibility

The trend towards sustainability and corporate responsibility is gaining momentum in the biscuit industry in Saudi Arabia. Manufacturers are increasingly aware of the environmental impact of their operations and are taking steps to minimize it. This includes efforts to reduce packaging waste, optimize energy consumption, and source ingredients responsibly. Many brands are now incorporating eco-friendly packaging and promoting recycling practices to minimize their carbon footprint.

Additionally, there is a growing emphasis on corporate social responsibility (CSR) initiatives. Companies are engaging in philanthropic activities, supporting local

communities, and contributing to social causes. These efforts not only enhance brand image but also align with the values of a socially conscious consumer base. Brands that demonstrate their commitment to sustainability and CSR are finding favor with consumers, especially among younger, environmentally aware demographics.

In conclusion, the Saudi Arabian biscuit industry is witnessing several key trends that reflect the evolving preferences and dynamics of the market. Health-conscious biscuits, flavor innovation, the rise of e-commerce, and a focus on sustainability and corporate responsibility are shaping the industry's present and future. As consumer expectations continue to change and diversify, manufacturers are adapting to these trends to meet the demands of a dynamic and increasingly sophisticated market. These trends not only present challenges but also opportunities for growth and differentiation in the competitive biscuit landscape of Saudi Arabia.

Segmental Insights

Type Insights

Sweet biscuits have emerged as the fastest-growing segment in the Saudi Arabian biscuit market. This surge in popularity can be attributed to changing consumer preferences and lifestyle choices. As the nation undergoes rapid urbanization and economic development, the demand for sweet biscuits has soared. These biscuits serve as convenient snacks, accompaniments to traditional Arabic coffee gatherings, and indulgent treats for various occasions.

Consumers are increasingly seeking a wide range of flavors, textures, and indulgent experiences in their sweet biscuits. Manufacturers are responding by introducing innovative and diverse offerings, from classic date-filled ma'amoul to exotic and fusion flavors. Additionally, the desire for healthier yet delicious options has led to the development of sweet biscuits that cater to this demand.

As a result, the sweet biscuit segment is thriving, providing opportunities for both established and emerging brands to capture a growing market share in Saudi Arabia. This trend underscores the importance of adapting to changing consumer tastes and preferences in the ever-evolving biscuit industry.

Sales Channel Insights

Online sales have become a rapidly growing segment in the Saudi Arabian biscuit

market. With the increasing penetration of the internet and the convenience of e-commerce, consumers are turning to online platforms to purchase their favorite biscuits. The COVID-19 pandemic further accelerated this trend as consumers sought contactless shopping options.

Biscuit manufacturers and retailers are responding by enhancing their digital presence and creating user-friendly websites and mobile apps. They are also employing various digital marketing strategies, including social media and online advertising, to engage with consumers and drive sales. The convenience of online ordering and home delivery services appeals to busy urban lifestyles and consumers in remote areas.

This shift to online sales not only offers a convenient shopping experience but also opens up opportunities for reaching a wider customer base. As a result, online sales have become a dynamic and rapidly growing segment in the Saudi Arabian biscuit market, reshaping the way consumers access and enjoy their favorite biscuit brands.

Regional Insights

The Western region of Saudi Arabia stands out as the dominating hub in the country's biscuit market. This prominence can be attributed to several factors, including the region's high population density, urbanization, and economic development. Cities like Jeddah and Riyadh, located in the Western region, serve as major commercial and cultural centers, attracting a diverse consumer base.

Additionally, the Western region is a melting pot of various cultures and influences, with a significant expatriate population and a growing number of international residents. This diversity in population translates into diverse tastes and preferences, creating a robust demand for a wide range of biscuit products, including traditional Middle Eastern varieties and international favorites.

Moreover, the Western region's well-developed infrastructure, including extensive retail networks and e-commerce platforms, further facilitates the distribution and sale of biscuits. As a result, biscuit manufacturers and retailers concentrate their efforts in the Western region, making it the dominant and thriving sector within the Saudi Arabian biscuit market.

Key Market Players

Mondelez AMEA

The Kellogg Company

Britannia Industries Limited

Food Manufacturers Co FMC (Ulker)

Gandour

International Foodstuffs Co (IFFCO)

NationalBiscuits Confectionery Co. Ltd.

Nationalfood Company-Americana Cake

Deemah United Food Industries Corp. Ltd. Co

Al Wefag Trading & Manufacturing (Haweek)

Report Scope:

In this report, the Saudi Arabia Biscuit market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Saudi Arabia Biscuit Market, By Type:

Crackers & Savory Biscuits

Sweet Biscuits

Saudi Arabia Biscuit Market, By Packaging:

Pouches/Packets

Boxes

Cans/Jars

Others

Saudi Arabia Biscuit Market, By Sales Channel:

Supermarkets/Hypermarkets

Specialist Retailers

Departmental Stores

Online

Others

Saudi Arabia Biscuit Market, By Region:

Western

Northern & Central

Eastern

Southern

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Saudi Arabia Biscuit market.

Available Customizations:

Saudi Arabia Biscuit Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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