

Saudi Arabia Frozen Food Market By Type (Frozen Poultry, Red Meat & Seafood, Frozen Snacks, Frozen Fruits & Vegetables, Frozen Meals, Others (includes Frozen Dairy & Dessert)), By Category (Ready-to-Cook, Ready-to-Eat, Others (Raw Meat, Raw Vegetables, Raw Fruit, etc.)), By Sales Channel (Supermarkets/Hypermarkets, Departmental Stores, Baqala Stores, Online, Others (Specialty Stores, Direct Sales, Institutional Sales, etc.)), By Region, By Competition Forecast & Opportunities, 2019-2029F

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Abstracts

Saudi Arabia Frozen Food Market was valued at USD 8.67 billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 4.2% through 2029. The Saudi Arabia frozen food market has experienced remarkable growth and transformation over the years, driven by changing consumer lifestyles, increased urbanization, and a growing appetite for convenience. This market encompasses a wide range of frozen products, including fruits and vegetables, meat and poultry, seafood, and ready-to-eat meals.

Rapid urbanization and a shift in consumer lifestyles have led to an increased demand for convenient and quick meal solutions. Saudi households, especially in urban areas, are looking for time-saving options that frozen food products provide. The fast-paced work culture in Saudi Arabia has led to a rise in the number of dual-income households. With limited time for meal preparation, frozen foods offer a convenient solution for families. The growth of modern retail formats, such as hypermarkets, supermarkets, and

convenience stores, has expanded the availability and accessibility of frozen food products. Saudi consumers can now find a wide range of frozen options in their local stores. Saudi consumers place a high value on food safety and quality. The frozen food industry has adapted by implementing rigorous quality control and safety measures, assuring consumers of the integrity of frozen products.

Frozen food, while growing in popularity, may face some cultural resistance in Saudi Arabia, where fresh food is traditionally preferred. Overcoming these cultural preferences is a challenge for the industry. Maintaining the cold chain and ensuring the integrity of frozen products during transportation can be challenging, especially in a country with varying climates and long distances. The Saudi Food and Drug Authority (SFDA) plays a pivotal role in regulating the frozen food industry. It sets standards for food safety and quality, ensuring that products meet the necessary requirements. Compliance with SFDA regulations is vital for companies operating in the Saudi frozen food market.

There is a growing trend in Saudi Arabia toward healthier frozen food options. This includes low-sodium, low-fat, and organic frozen products to cater to health-conscious consumers.

The introduction of new and innovative frozen food products, including those catering to specific dietary requirements and regional tastes, presents significant opportunities for growth. E-commerce platforms have become an essential distribution channel for frozen food products, particularly during the COVID-19 pandemic. Leveraging e-commerce can open up new avenues for market expansion.

In conclusion, the Saudi Arabia frozen food market is thriving due to changing consumer lifestyles, a busy work culture, and an expanding retail landscape. The industry continues to evolve to meet the needs of Saudi consumers, offering convenience, quality, and safety in frozen food products. With opportunities for health-focused and innovative offerings, the frozen food market in Saudi Arabia is expected to continue its growth trajectory in the years to come.

Key Market Drivers

Changing Consumer Lifestyles and Urbanization

One of the primary drivers of the growth in the Saudi Arabia frozen food market is the changing lifestyles and urbanization trends in the country. As Saudi Arabia undergoes

rapid urbanization, with a growing number of people residing in cities and metropolitan areas, consumer habits and dietary preferences have evolved.

The urban lifestyle is often characterized by increased work hours, longer commutes, and busier schedules. This has led to a shift in consumer behavior, with more individuals and families seeking convenient and time-saving food options. Frozen food products, such as ready-to-eat meals, frozen fruits and vegetables, and frozen meats, align perfectly with these demands.

Consumers in urban areas appreciate the convenience and versatility that frozen foods offer. These products can be stored for extended periods, allowing individuals to reduce the frequency of grocery shopping while still having access to a variety of nutritious and flavorful meal options. Frozen foods also address the need for portion control, reducing food wastage and offering easy meal preparation solutions for busy individuals and families.

Moreover, the desire for international and diverse cuisines is prevalent in urban centers, and the frozen food market has responded accordingly. Consumers can now find a wide array of frozen foods, from traditional Saudi dishes to international favorites, making it easier to enjoy global flavors in the comfort of their homes.

Increasing Disposable Income and Affordability

The rising disposable income among Saudi consumers has significantly contributed to the growth of the frozen food market. As the economy has diversified and expanded, households have experienced increased income levels, allowing them to explore a wider range of food choices, including frozen products.

Frozen foods offer an attractive value proposition for consumers. They are often priced competitively, making them an affordable alternative to dining out or ordering takeout. Consumers can enjoy restaurant-quality meals at home, without the associated costs of eating at a restaurant. This affordability is particularly appealing to young professionals and families looking to balance quality with cost-effectiveness.

The affordability of frozen food also extends to its ability to reduce food waste. By allowing consumers to use only the required amount of frozen food and store the rest for later, it helps in managing household budgets and minimizing food expenditure.

As a result, the frozen food market has seen robust sales growth in Saudi Arabia, with

consumers viewing these products as a practical and cost-effective solution for their daily food needs.

Expanding Retail Distribution Channels

The availability and accessibility of frozen food products have significantly expanded in Saudi Arabia due to the increasing number of retail distribution channels. Traditionally, frozen foods were primarily found in large supermarkets and hypermarkets. However, the market has evolved, and frozen foods can now be easily found in various retail outlets, including convenience stores, neighborhood markets, and even online platforms.

The emergence of small and mid-sized grocery stores and convenience outlets, which are strategically located to serve urban and suburban areas, has made it more convenient for consumers to access frozen food products. These smaller retail establishments are preferred by consumers who seek a quick and hassle-free shopping experience.

Furthermore, the growth of e-commerce and online grocery delivery services has had a profound impact on the frozen food market. Consumers can now order a wide range of frozen products online, and these goods are promptly delivered to their doorsteps. This convenience factor has significantly expanded the reach of frozen food products to consumers who may not have easy access to physical stores, such as those in remote or less densely populated areas.

Key Market Challenges

Cultural and Dietary Preferences

Saudi Arabia has a unique culinary culture deeply rooted in traditional Middle Eastern and Islamic dietary preferences. While the frozen food market offers a wide variety of products, aligning with these preferences can be challenging. Traditional Saudi cuisine primarily relies on fresh, local ingredients, and many Saudi households continue to prepare meals from scratch. There is a cultural preference for fresh foods, such as fruits, vegetables, and meats, which can make it difficult for frozen food products to gain widespread acceptance.

The challenge for frozen food manufacturers is to cater to local tastes while also maintaining the convenience and long shelf life that frozen products offer. Additionally,

there are dietary restrictions during Islamic religious periods, such as Ramadan, which impact the consumption of frozen foods. These cultural and dietary factors require adaptation and innovation in product offerings to better align with the local market.

Supply Chain and Distribution Challenges

Maintaining a reliable and efficient cold supply chain is a critical challenge in the frozen food industry. The extreme heat of the Saudi climate can pose difficulties in the transportation and storage of frozen products. Ensuring that frozen goods remain at the required low temperatures throughout the distribution process is essential to prevent spoilage.

Moreover, the vast geographical size of the country and the dispersion of the population can create distribution challenges. Remote areas may have limited access to frozen food products, which can result in unequal market penetration. Distributors and retailers need to invest in advanced cold storage and transportation facilities to overcome these logistical challenges.

Quality and Food Safety Standards

Consumers in Saudi Arabia place a premium on food safety and quality. Given the nature of frozen foods, maintaining quality and safety throughout the supply chain is crucial. Importantly, consumers need to trust that the frozen food they purchase is not only convenient but also safe and nutritious.

Ensuring compliance with strict quality and safety standards is a significant challenge for the frozen food industry. It involves adhering to Saudi Arabia's regulatory requirements and international food safety standards. Manufacturers and distributors need to invest in stringent quality control measures, including product testing, temperature monitoring, and proper labeling. Meeting these high standards can be resource-intensive and may require ongoing investments in infrastructure and training to remain competitive in the market.

Key Market Trends

Health and Convenience Converge

One prominent trend in the Saudi Arabian frozen food market is the increasing convergence of health and convenience. Consumers are becoming more health-

conscious and seeking frozen food options that not only offer the convenience of quick and easy preparation but also align with their dietary preferences and wellness goals.

To address this trend, frozen food manufacturers are introducing healthier product offerings. This includes a focus on lower sodium and reduced fat options, as well as products that cater to specific dietary requirements, such as gluten-free, organic, and vegan. Healthier frozen food choices are becoming more widely available, allowing consumers to enjoy the convenience of frozen meals without compromising on their nutrition.

Additionally, the use of cleaner and more transparent ingredient lists is on the rise. Consumers are increasingly looking for frozen foods that contain recognizable, natural ingredients and minimal additives or preservatives. This shift towards healthier, cleaner frozen food options is expected to continue, driven by the growing awareness of the importance of balanced nutrition and the demand for convenient meal solutions that support overall well-being.

Diversification of Ethnic and International Cuisine

The Saudi Arabian population is culturally diverse, with a significant expatriate community hailing from various countries. This cultural diversity has fueled a growing demand for a wide variety of ethnic and international cuisines in the frozen food market.

Manufacturers are responding to this trend by expanding their product lines to include a broader array of global flavors and dishes. Frozen meals and snacks inspired by cuisines from Asia, Europe, the Middle East, and the Americas are gaining popularity. Consumers can now find everything from frozen Italian pasta dishes to traditional Middle Eastern appetizers, providing a convenient way to enjoy international flavors without the need for extensive preparation.

This diversification of offerings extends to appetizers, side dishes, and desserts, allowing consumers to explore and savor different culinary traditions in the comfort of their homes. The trend towards ethnically diverse frozen food options reflects the multicultural nature of Saudi Arabia and the desire for convenient meal choices that cater to a range of tastes and preferences.

Sustainability and Eco-Friendly Packaging

Sustainability is a global trend that has made its mark on the Saudi Arabian frozen food

market. Consumers are increasingly concerned about the environmental impact of their food choices, and this awareness is driving a demand for eco-friendly and sustainable packaging solutions.

Manufacturers are responding by adopting more sustainable packaging practices, such as reducing plastic usage, using recyclable materials, and implementing responsible sourcing of packaging materials. Additionally, there is a growing emphasis on reducing food waste through portion-controlled and resealable packaging, ensuring that consumers can use only what they need and keep the rest for later.

The sustainable trend extends to the sourcing and production of frozen food. Consumers are looking for products that are sourced and manufactured with respect for the environment and local communities. This includes a preference for brands that emphasize ethical and sustainable practices in their supply chains, such as responsible fishing or environmentally friendly farming methods.

Moreover, the traceability of ingredients and transparent labeling is gaining importance. Consumers want to know where their food comes from and how it was produced, with some brands providing detailed information about the sourcing and production of their frozen products.

Segmental Insights

Type Insights

Ready-to-eat (RTE) products have established a significant presence in the Saudi Arabia frozen food market, reflecting changing consumer lifestyles, dietary preferences, and the convenience factor. This sector has seen remarkable growth in recent years, driven by several factors that contribute to the prominence of RTE products within the Saudi frozen food market.

One of the key drivers of RTE's prominence in the Saudi Arabia frozen food market is the shifting lifestyle of consumers. As more Saudi households have two income earners and busier daily routines, there is a growing demand for convenient meal options. RTE products, which are pre-cooked and require minimal preparation, align perfectly with the need for quick and hassle-free meals.

Saudi Arabia's cultural and religious practices influence dietary habits. During Ramadan, for instance, there is a tradition of consuming specific foods to break the fast.

RTE products cater to these traditions by providing ready-to-serve options, making them an essential component of the Saudi diet during this period.

The quality and taste of RTE frozen food have improved significantly over the years. Consumers have come to trust that these products can provide a convenient yet satisfying dining experience. The advancements in food processing and packaging technology have allowed for the preservation of taste and texture, ensuring that RTE items meet consumers' culinary expectations.

The frozen food industry has evolved to address consumers' concerns about nutrition. Many RTE products now feature healthier ingredient profiles, reduced sodium content, and better labeling to help consumers make informed choices. This shift towards healthier RTE options has attracted health-conscious consumers.

The Saudi frozen food market offers a wide range of RTE products, including frozen meals, snacks, appetizers, and desserts. This diversity caters to different dietary preferences, from traditional Saudi cuisine to international flavors, providing something for everyone.

Frozen RTE products often offer cost-effective alternatives to dining out or ordering takeout. Saudi consumers appreciate the ability to enjoy restaurant-quality meals without the expense, which has further contributed to the success of this market segment.

RTE frozen products are readily available in various retail outlets, including supermarkets, hypermarkets, and convenience stores across Saudi Arabia. This accessibility makes it convenient for consumers to purchase these items and stock up on their favorite RTE options.

The freezing process is an effective method for preserving food, ensuring that RTE products have a longer shelf life. Consumers appreciate the ability to store these items for an extended period without compromising food safety or quality.

Food manufacturers continually innovate and introduce new RTE products to capture the attention of consumers. These innovations include premium, exotic, or fusion flavors, catering to changing taste preferences and attracting a broader customer base.

Sales Channel Insights

Online platforms have undeniably secured a significant share in the Saudi Arabia frozen food market, revolutionizing the way consumers purchase and access a wide variety of frozen food products. This transformation is driven by several key factors that have made online shopping for frozen foods increasingly popular in the kingdom.

Online shopping offers unparalleled convenience for consumers in Saudi Arabia. With a few clicks, shoppers can access a diverse range of frozen food products, from frozen vegetables and fruits to ready-to-eat meals, all from the comfort of their homes. This convenience has significantly contributed to the growth of the online frozen food market.

Online platforms provide a vast selection of frozen food products, including options that may not be readily available in traditional brick-and-mortar stores. This variety appeals to consumers seeking diverse options for their culinary needs, from international cuisines to dietary-specific products.

Delivery services have become an integral part of the online shopping experience in Saudi Arabia. Online retailers and delivery companies ensure that frozen foods are handled and transported under controlled conditions to maintain their quality. This convenience-driven approach has further boosted the online frozen food market.

Online platforms offer the flexibility to buy frozen foods in bulk, which is appealing to larger families or businesses. This option allows consumers to stock up on essentials without the hassle of carrying heavy loads or navigating crowded supermarkets.

The fast-paced lifestyle of many Saudi residents often leaves little time for grocery shopping. Online shopping for frozen foods saves time by eliminating the need to physically visit stores, wait in lines, and commute, making it a practical choice for busy individuals and families.

Online platforms provide detailed product information and customer reviews. This transparency allows consumers to make informed decisions when selecting frozen food products, ensuring they meet their preferences and dietary requirements.

Online retailers frequently offer promotions, discounts, and exclusive deals on frozen food items. These cost-saving opportunities are attractive to price-conscious consumers, encouraging them to explore online options.

The COVID-19 pandemic accelerated the adoption of online shopping for frozen foods in Saudi Arabia. Lockdowns, social distancing measures, and health concerns prompted

more consumers to turn to e-commerce for their grocery needs. This shift in consumer behavior is expected to persist, further solidifying the online market's share in the frozen food sector.

The Saudi government has promoted e-commerce and digital transformation as part of its Vision 2030 plan. These initiatives have improved the overall digital infrastructure and created a favorable environment for online businesses, including those in the frozen food sector.

With the growth of e-commerce, consumers in Saudi Arabia have gained trust in online retailers and their ability to deliver high-quality frozen food products. This trust has played a pivotal role in the adoption of online shopping for frozen foods.

Regional Insights

The Western region of Saudi Arabia plays a pivotal role in the country's frozen food market, contributing significantly to the growth and development of this rapidly expanding sector. Several factors have led to the Western region's prominence in the Saudi Arabian frozen food market, reflecting the changing dietary habits and preferences of the region's residents.

The Western region, including major cities such as Jeddah and Mecca, is strategically located as a major entry point for imported frozen food products. Its proximity to Red Sea ports and international trade routes makes it a natural hub for the import and distribution of frozen goods. The infrastructure, including cold storage facilities and transportation networks, has developed in response to the growing demand for frozen foods.

The Western region is home to a diverse population, including both Saudi nationals and expatriates from various cultural backgrounds. This diverse demographic landscape has created a demand for a wide variety of frozen food products that cater to different culinary traditions and tastes. Frozen foods provide a convenient way to access familiar dishes and ingredients from around the world.

The Western region, with its proximity to the holy cities of Mecca and Medina, experiences a significant influx of tourists and pilgrims throughout the year. This high volume of visitors fuels the demand for frozen foods in the hospitality sector, including hotels, restaurants, and catering services. Frozen food products are an efficient and reliable solution for serving large numbers of guests, maintaining quality, and reducing

food waste.

As urbanization and changing lifestyles become more prevalent in Saudi Arabia, convenience plays a crucial role in food consumption. Frozen food products offer a hassle-free and time-saving option for busy individuals and families. They eliminate the need for extensive meal preparation and reduce the time spent in the kitchen, making them a popular choice for those seeking convenience.

The Western region offers a diverse range of frozen food products, including frozen fruits and vegetables, meat and poultry, seafood, ready-to-eat meals, and desserts. This diversity caters to different dietary preferences, whether they be for traditional Saudi dishes, international cuisine, or specialized dietary requirements.

The Western region is home to numerous retail and supermarket chains, providing a wide distribution network for frozen food products. These stores stock an extensive selection of frozen items, making it convenient for consumers to access a variety of options for their daily meals and special occasions.

The Western region adheres to high health and safety standards, ensuring the quality and safety of frozen food products. This commitment to food safety and hygiene gives consumers confidence in the products they purchase, promoting the continued growth of the frozen food market.

Key Market Players

The Savola Group

Sunbullah Group

Kuwait Food Company (Americana Group)

Halwani Brothers Co., Ltd

Al Karamah Dough Production Co.

General Mills Inc.

Nestle S.A.

McCain Foods Limited

Americana Group, Inc.

Unilever PLC

Report Scope:

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

Saudi Arabia Frozen Food Market, By Type:

Frozen Poultry

Red Meat & Seafood

Frozen Snacks

Frozen Fruits & Vegetables

Frozen Meals

Others

Saudi Arabia Frozen Food Market, By Category:

Ready-to-Cook

Ready-to-Eat

Others

Saudi Arabia Frozen Food Market, By Sales Channel:

Supermarkets/Hypermarkets

Departmental Stores

Baqala Stores

Online

Others

Saudi Arabia Frozen Food Market, By Region:

Western

Northern & Central

Eastern

Southern

Competitive Landscape

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

Available Customizations:

Saudi Arabia Frozen Food 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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