Gulf Cooperation Council (GCC) Bottled Water - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 100 pages | Mordor Intelligence

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Report description:

The Gulf Cooperation Council Bottled Water Market size is estimated at USD 7.55 billion in 2025, and is expected to reach USD 12.81 billion by 2030, at a CAGR of 11.16% during the forecast period (2025-2030).

The total volume and value sales of bottled water benefitted from the COVID-19 outbreak in 2020, and this category recorded growth. This was due to stockpiling and bulk buying of bottled water in line with the government-enforced curfews and periodic lockdowns in major cities, including Makkah and Madinah, in early March. The lockdown restrictions on the foodservice industry were a major challenge for manufacturers and affected demand in the short term.

The GCC bottled water market has witnessed significant growth due to the growing tourism industry. Moreover, the number of foodservice channels, such as hotels and restaurants, is increasing in the country. In order to offer quality service to tourists, the region is also contributing to the high share of sales in the bottled water market, primarily from the still bottled water segment.

Furthermore, a major consumer shift is being observed in the GCC bottled water market from carbonated beverages, like cold drinks, to still bottled water solely due to the latter's healthy positioning in the retail space, which is driving the market's growth.

GCC Bottled Water Market Trends

Scarce Water Resources Leading to Increasing Dependency on Packaged Drinking Water

The most water-scarce region in the world is the Middle-East & North Africa region (MENA), including GCC, where more than 60% of the population has little or no access to drinkable water. Over 70% of the region's gross domestic product (GDP) is exposed to high or very high-water stress, which is extreme compared to the global average of 22%. According to the World Bank, the MENA region also has the greatest expected economic losses from climate-related water scarcity, estimated to account for 6-14% of GDP by 2050. This scarcity poses a significant threat to the region's long-term socio-economic development. The deep scarcity of drinkable water has been an issue due to water scarcity and unavailability of treated water, which is leading to the high dependency on bottled water and packed forms of drinking water across the GCC region.

Saudi Arabia Holds the Largest Market Share

The Saudi Arabian bottled water market has witnessed significant growth due to the growing tourism industry. Moreover, the number of foodservice channels, such as hotels and restaurants, is also increasing in the country. Therefore, to offer quality service to tourists, these channels are also contributing to a high share of sales in the bottled water market. Additionally, Saudi Arabia is a large industry for bottled water as consumers are becoming aware of the advantages of drinking bottled water rather than consuming tap water provided by local bodies. The increasing disposable incomes and a significant rise in the population rate are further expected to indirectly boost the demand for bottled water across the region.

GCC Bottled Water Industry Overview

The GCC bottled water market is highly fragmented, with a large number of active players present. Some major players in the GCC bottled water market are Nestle SA, Agthia Group, Masafi Inc., Pepsico Inc., and Danone SA, among others. The leading players are consistently increasing their bottled water products in all packaged forms, so they can be consumed in all situations. Due to the increased demand for bottled water in the country, companies are continually strategizing toward product expansion, which is likely to increase the production capacity. This expansion is also expected to bring improvements in the final product, which will ensure that supply remains in sync with the increasing demand.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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