

## **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

### **AVAILABLE LICENSES:**

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

### **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

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

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

#### **Table of Contents:**

##### 1 INTRODUCTION

###### 1.1 Study Assumptions and Market Definition

###### 1.2 Scope of the Study

##### 2 RESEARCH METHODOLOGY

##### 3 EXECUTIVE SUMMARY

##### 4 MARKET DYNAMICS

###### 4.1 Market Drivers

###### 4.2 Market Restraints

###### 4.3 Porter's Five Forces Analysis

###### 4.3.1 Threat of New Entrants

###### 4.3.2 Bargaining Power of Buyers/Consumers

###### 4.3.3 Bargaining Power of Suppliers

###### 4.3.4 Threat of Substitute Products

###### 4.3.5 Intensity of Competitive Rivalry

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## 5 MARKET SEGMENTATION

### 5.1 By Type

#### 5.1.1 Still Water

#### 5.1.2 Sparkling Water

#### 5.1.3 Functional Water

### 5.2 By Distribution Channel

#### 5.2.1 Supermarkets/Hypermarkets

#### 5.2.2 Convenience/Grocery Stores

#### 5.2.3 On-trade Channels

#### 5.2.4 Home and Office Delivery

#### 5.2.5 Other Distribution Channels

### 5.3 Geography

#### 5.3.1 Saudi Arabia

#### 5.3.2 United Arab Emirates

#### 5.3.3 Kuwait

#### 5.3.4 Qatar

#### 5.3.5 Bahrain

#### 5.3.6 Oman

## 6 COMPETITIVE LANDSCAPE

### 6.1 Most Adopted Strategies

### 6.2 Market Share Analysis

### 6.3 Company Profiles

#### 6.3.1 Nestle SA

#### 6.3.2 Agthia Group PJSC

#### 6.3.3 Masafi Inc.

#### 6.3.4 ALGhadeer Drinking Water LLC

#### 6.3.5 PepsiCo Inc.

#### 6.3.6 Crystal Mineral Water & Refreshments LLC Co.

#### 6.3.7 Al-Qassim Water

#### 6.3.8 Al Furat Drinking Water LLC

#### 6.3.9 New Technology Bottling Company (NTBC) KSCC

#### 6.3.10 Al-Rawdatain Water Bottling Co.

#### 6.3.11 Danone SA

## 7 MARKET OPPORTUNITIES AND FUTURE TRENDS

## 8 IMPACT OF COVID-19 ON THE MARKET

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## 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

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

### ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	2025-05-07
		Signature	

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)  
[www.scotts-international.com](http://www.scotts-international.com)