

# Webinar

15<sup>th</sup> April 2025



# Channelplay:

## Your Retail Expansion Partner in Saudi Arabia

### Who We Are

Channelplay is a leading retail solutions and go-to-market strategy firm, helping brands establish and scale their presence in Saudi Arabia and the Middle East.

### What We Do

- Retail execution & in-store excellence
- Salesforce outsourcing & training
- Market entry consulting for Saudi & UAE
- E-commerce & quick commerce enablement
- Distribution-as-a-Service solutions
- Powering brand success across the region





# Unlocking Saudi Arabia's Retail Potential

## Key Economic & Retail Indicators

- \$1.2 Trillion Nominal GDP (~\$2.4 trillion PPP)
- Only trillion-dollar economy with median age <30
- GDP per capita: \$30,000+
- 120K new businesses registered per quarter (+80% YoY)

**63** Index Score (vs UAE in low 50s)

**36%** Female labour force participation



# Decoding Saudi Shoppers: What Brands Need to Know

- Shift from “hyper-consumption” to “value-for-money”
- Consumers seek aspirational, yet affordable brands
- Strong emphasis on wellness, fitness, and appearance

**Rise** in dual-income households

**60%** of Saudi population is under 35



# From Consoles to Esports: Gaming & Entertainment Trends

- Gaming market valued at \$1 Billion
- Government investing \$38 Billion to build gaming ecosystem
- Riyadh hosts multiple global esports events

**23Mn+** Active gamers

**75%+** of gamers engage in e-sports, streaming & gaming culture





## Beyond Beauty: Personal Care & Wellness Trends in KSA

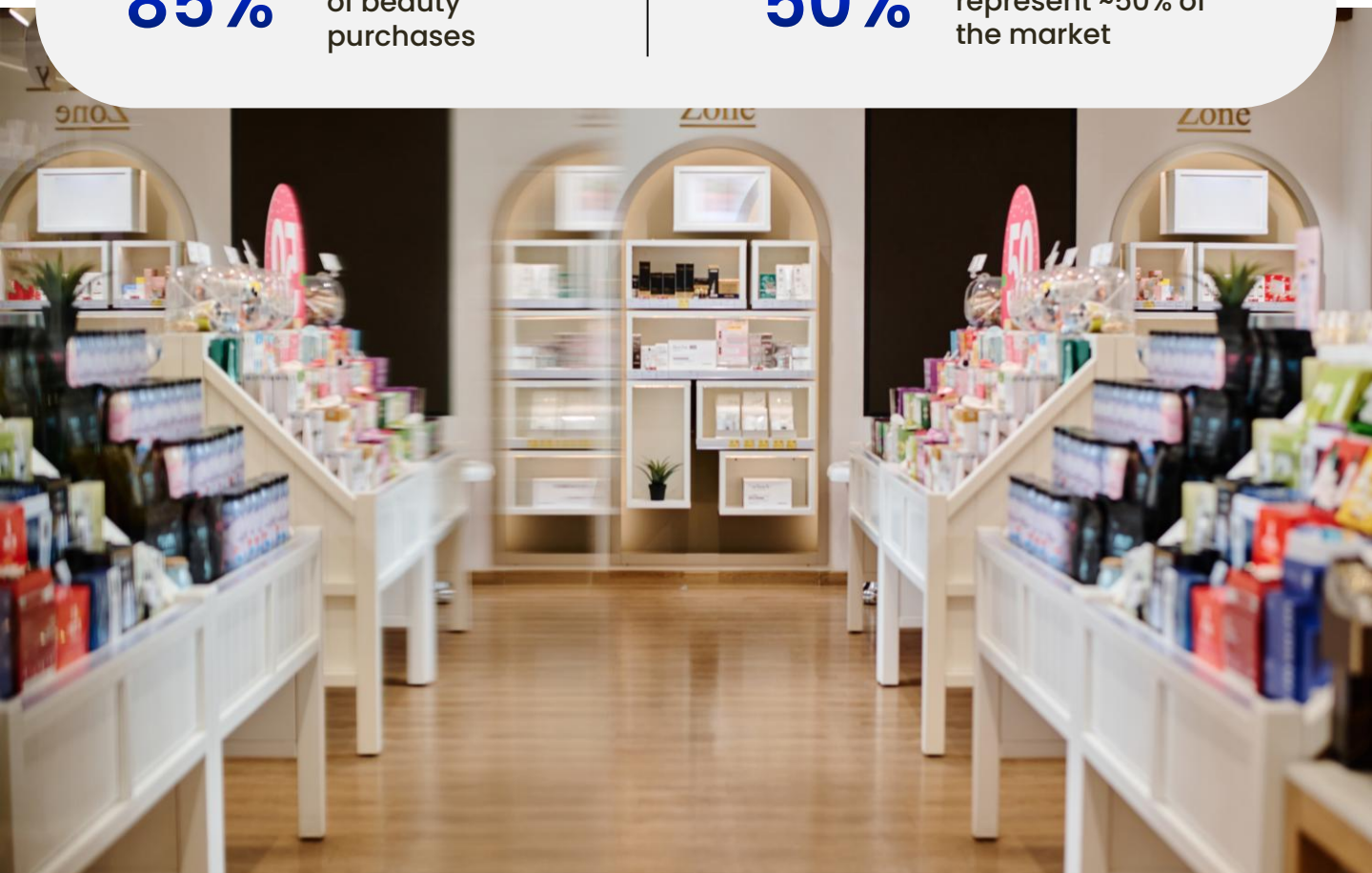
- Beauty & Personal Care market size: \$10 Billion
- Fragrances represent ~50% of the market
- Beauty accounts for 11% of household spend (vs <5% in India, China, US, UK)
- Shift towards clean, premium, and halal-certified products

**85%**

Saudi women drive  
of beauty  
purchases

**50%**

Fragrances  
represent ~50% of  
the market



# A Bold New Future: Lifestyle Shifts Under Vision 2030

- Quadruple physical activity levels among citizens
- Organized retail & e-commerce to reach 80% retail share
- Healthcare and wellness prioritized
- Leisure, tourism, and cultural sectors rapidly expanding

**70%** Raise home ownership rate

**80%** Organized retail & e-commerce to reach 80% retail share





# Fast, Faster, Fastest: The Rise of E & Quick Commerce in Saudi

- Quick Commerce already at ~10% user penetration
- Hunger Station, Jahez & Keeta dominate Q-Commerce (~70% share)
- Non-grocery Q-Commerce expected to be 25%+ by 2027

**30%**

E-commerce  
penetration reached  
~30% in 2024

**50%**

E-commerce + Q-  
Commerce projected to  
hit ~50% of retail by 2030



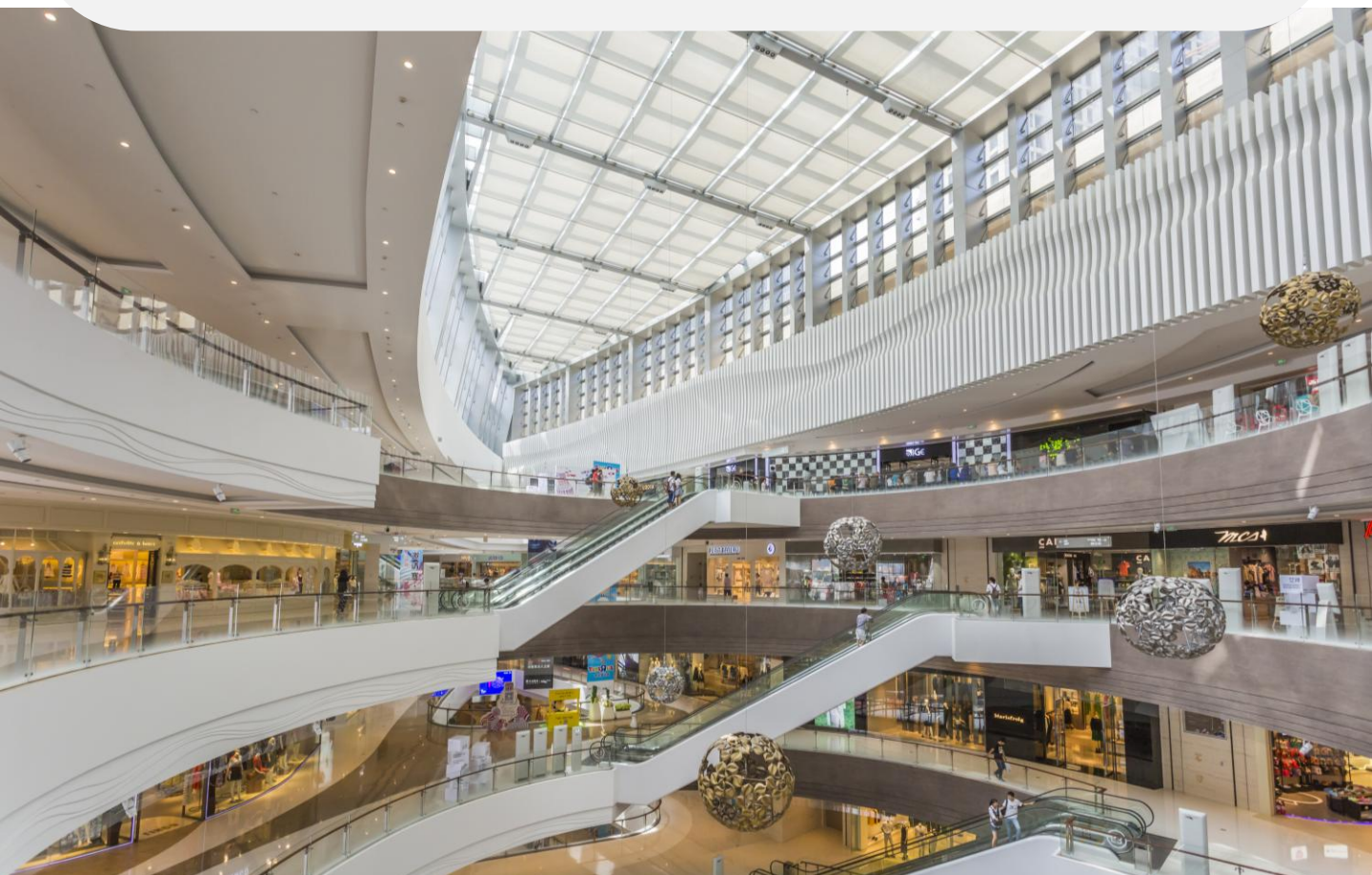


# From Traditional to Transformational: Saudi Retail's Next Phase

- High footfall in malls, community centers, and mixed-use spaces
- New wave of domestic and international retail brands entering
- Hybrid physical + digital retail models on the rise

**80%** Target: 80% organized retail share by 2030

**20%+** Organized retail share grew from ~25% to ~45% in 3 years



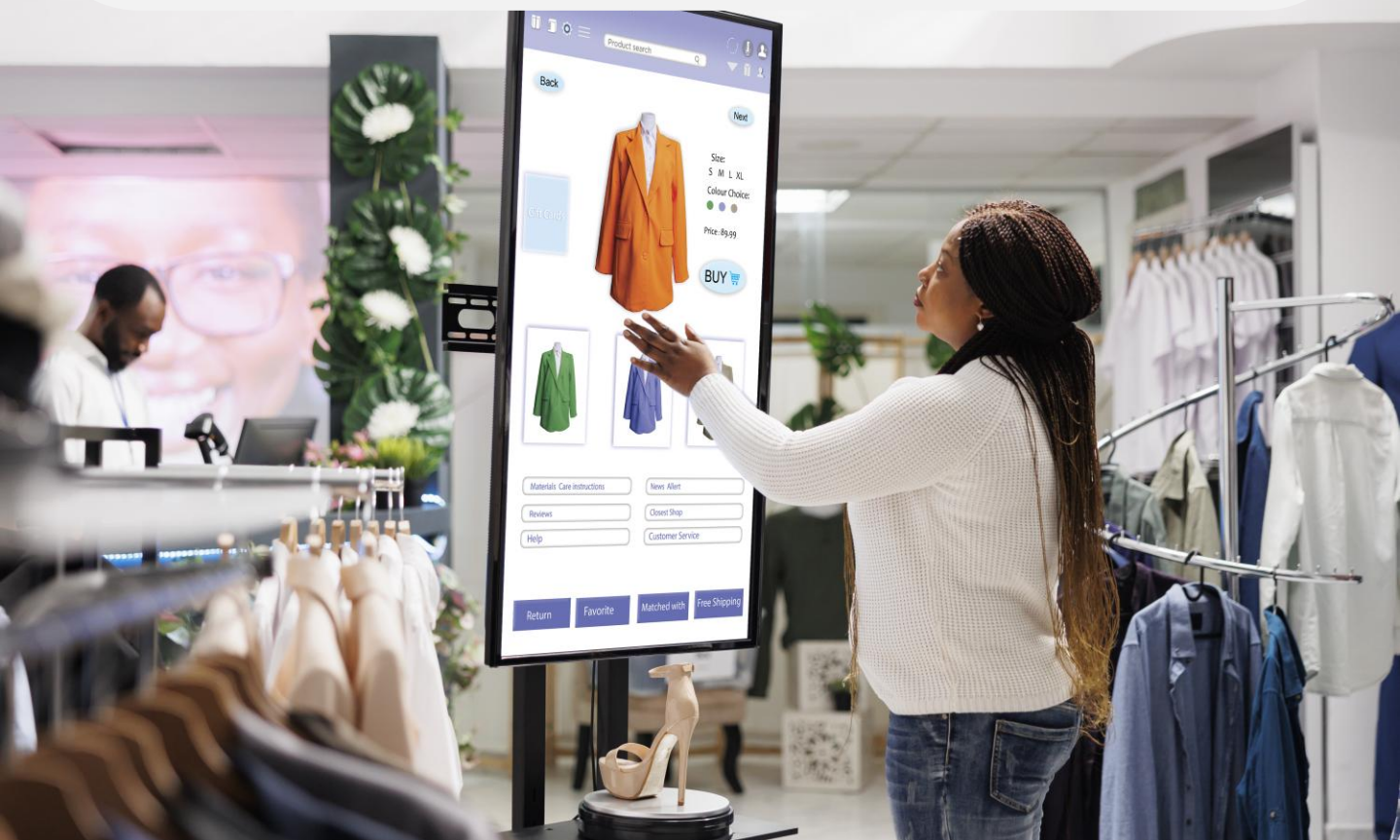
# Breaking In: Your 5-Step Guide to Saudi Market Entry

- Compliance timelines:  
→ 2 weeks for product line extensions
- Price positioning is key: “accessible luxury” performs well
- Packaging, labeling & marketing must align with cultural context
- Brands offering localized SKUs or campaigns perform better
- Speed-to-market is critical due to fast-evolving trends

**6-12** weeks for new brands

**2-4**

weeks for reformulations





# Saudi Arabia

## Market Entry Checklist

- 1. Product Compliance** – Get approvals (6-12 weeks), ensure Arabic labeling.
- 2. Logistics & Warehousing** – Plan for customs, warehousing, and marketplace listing.
- 3. Strategic Partnerships** – Work with experienced vendors to speed up entry.
- 4. Smart Budgeting** – Avoid overspending in the first 6-12 months; learn from market response.
- 5. Agility & Adaptability** – Stay updated on fast-changing eCommerce & quick commerce trends.