

Management Strategy Analysis:

Red Bull in Saudi Arabia

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The image of two red bulls charging toward one another behind a yellow sun is ubiquitous and unmistakable. In less than half a decade, Red Bull has built one of the most recognizable brands, expanding across markets from energy drinks to motorsports, retail, and publishing, championing global expansion. Since its inception in 1984, Red Bull has extended operations into 170 countries. Their success is attributed to their transnational approach, enabling the preservation of their brand identity while allowing for local adaptations in international territories. Their lean, low-hierarchy organizational design instituted by their founder, Dietrich Mateschitz, enables a vision of low bureaucracy and innovative, entrepreneurial culture. In the early 2000's, Red Bull decided to expand into the Saudi Arabian market. Rife with opportunities and challenges, we explore how Red Bull's management strategy (organizational design, strategy, and human capital structure) has fit into Saudi Arabia's environment (cultural, political, economic) as well as identify opportunities for improvement from their current strategy.

Country Analysis: Saudi Arabia

In order to comprehensively understand the climate Red Bull is operating in, Saudi Arabia's economic, political, and cultural environments must be explained. Saudi Arabia is an economically and culturally rich country, serving as the world's top oil exporter and birthplace of one of the world's largest religions, Islam. Economically, they have experienced leaps in growth due to internal and external initiatives to stimulate and expand their economy over the past decade, building off of their competitive strength in exporting crude and refined oil, plastics, and shipping (See Table 2 for top company names and exports). In 2016, the Saudi government announced Vision 2030, a country-wide initiative to modernize the Kingdom, expanding economic markets, improving infrastructure, and shifting from traditional culture to embrace a global standing. As a result, the country has improved their global competitiveness, expanding into sectors beyond oil and energy such as digital business spaces (e-commerce, FinTech, etc.), entertainment, and sports.

This decade of economic expansion and new opportunities is reflected by Saudi Arabia's strong economic performance metrics, increased foreign direct investment, and high immigration rates. Since 2014, the Kingdom's GDP has hiked, experiencing a 58.6% increase to \$1.238 trillion dollars from 2014. Other key economic metrics such as GDP purchasing power parity, GDP per capita and GDP growth have all experienced steady rises over the past decade, further demonstrating the country's continued economic growth. (See Table A in the appendix for the comparison across years). With unemployment rate (4.9%) and inflation (1.7%) kept relatively low, Saudi Arabia's economy demonstrates resilience and stability, providing a favorable environment for investment and sustained growth.

Over the past decade, Saudi Arabia's foreign direct investment inflows and outflows have fluctuated reflecting both global volatility and domestic reforms. In 2014, Saudi Arabia received only

\$1.51 billion in FDI. This was largely due to the strict economic policy limiting foreign investors, including restricted ownership on many sectors. This was also during a time when the economy was heavily dependent on royally owned oil with little development in other sectors comparatively. Through Vision 2030, however, foreign investment was encouraged through the launches of projects such as NEOM and The Line, surging FDI to \$28.35 billion in 2021.

And as huge development projects gain global attention, talent from the MENA region and world migrate to Saudi Arabia in search of economic opportunity, serving as another key indicator of the country's economic success. Saudi Arabia's population has sustained a steady increase over the past decade seeing a 1.68% growth rate per year. With a declining birth rate from 3.0 to 2.1 in less than two decades, this growth is reflective of their high expatriate population increasing from 12.8 million to 15.7 million between 2014 and 2024, resulting in roughly 44% of their population being immigrants as of 2024. Additionally, the Kingdom's population is youthful, with over 60% of the total population under the age of 35. This not only creates a healthy labor supply to fuel this expansion, but a strong consumer base for the industries Saudi Arabia seeks to build under Vision 2030.

In efforts to meet these ambitious goals of modernization, the Kingdom has announced initiatives to expand infrastructure and strengthen the labour market. The Vision 2030 plan lays out intensive plans for automation to accompany industry expansion, requiring heavy infrastructure investment providing opportunity for both domestic and international firms. Labour markets will also need to adapt to these new initiatives, markedly allocating resources to skilling their labour force, specifically recent graduates, to succeed in this evolving market. This may pose a challenge to their current labor structure, known for its rigidity and hierarchical focus coming from tight state control, or it may be able to adapt swiftly for the very same reason.

Transitioning the analysis from the Kingdom's economic landscape to political isn't difficult given how intertwined the two are. Government involvement and collaboration in the economy is responsible for Saudi Arabia's macroeconomic stability - with a global competitive score of 100, it is ranked 1st in the world. That being said, this carries along with it significant barriers to economic growth, particularly impacting new businesses wishing to start.

Saudi Arabia is governed by an absolute monarchy run by the royal Saud family. The country's current chief of state, King Salman bin Abd-al Aziz Al Saud, has ruled since January of 2015 with his brother, Crown Prince and Prime Minister Muhammad Bin Salman bin Abd al-Aziz Al Saud, serving as head of government. Since the beginning of King Salman's reign, he has made strong pushes to modernize the country, expanding employment and social opportunities for women, encouraging foreign investment, and expanding the private sector. It is under his rule that Vision 2030 has been announced and carried out. The government's statist role in their free market economy positions the country well to make

quick responses to global economic changes (such as a global pandemic), providing a safety net to sudden shifts. While this provides certain protections on a macro scale, the bureaucratic guard rails have made it difficult to start private businesses both domestically and abroad. In 2019, the country's rating for business dynamism, which aggregates measures such as cost and time to start a business, and entrepreneurial culture, while improved, still ranked 109th in the world out of 141 countries. The cost and time to open a business is still longer than most other free market economies with bureaucratic oversight serving as a leading bottleneck. That is not to say, however, that efforts are not improving to expand private ownership and international involvement, as mentioned before in surging foreign investment, only that it is under close supervision.

The Kingdom's bureaucratic control of economy, moderate corruption score, and strict controls over its population, awards itself as a moderately free country by Heritage. Despite economic and social expansion, the country's standing has not changed much over the past decade. The government's tight knit bureaucracy limits political transparency and weakens the integrity of their judicial system, which has a score of 38.1 out of 100. This impacts citizen's trust of the government, although efforts are made by the royal family to provide ample welfare opportunities to their subjects in exchange for their loyalty, earning the country a low crime rate. Their current corruption perception score is 59 out of 100, ranking them 38th out of 180 countries. The monarchy state does rule with a strong force with a well trained police and strict limitations on the personal rights of the people, suppressing dissent and limiting freedom of speech and press.

To close our contextualization of Saudi Arabia's landscape, we discuss culture. Shaped by the Islamic religion, Saudi Arabia is characterized by a collectivist culture with high uncertainty avoidance. Family is a priority, stemming not only from Islamic teachings on the importance of family, but pre-Islamic tribal society values, where one is known from the group they are descended from. Given Islamic law's strict and clear governance over what is halal (permissible) and haram (impermissible), and the structured lifestyle that the religion installs, the population by and large is seen as averse to uncertainty, influencing their slow adoption of new technology and business practices. The Kingdom is also characterized by a strong masculine society, focusing on achievement, competition, and success. With high power distance within national firms, deference to authority and hierarchical relationships are custom in Saudi Arabian business relationships. These two cultural aspects create a business environment geared towards impressing those you work for and a strong competitive environment within and between firms.

While discussing Saudi culture, women's role in society should be individually evaluated. Prior to 2012, women were heavily regulated from participating in the workforce. Islamic law limits the interaction between unmarried men and women, justifying barring women from participating in roles

outside of healthcare, education, and out-of-sight roles where genders minimally mix. Over the past decade, in alignment with Vision 2030 reforms, the Saudi Arabian Ministry of Labour has issued continuous policies to encourage women into the workforce, and has relaxed the limitations of where they can work. In 2018, women were allowed to drive without the accompaniment of a male relative, expanding their opportunities for occupational autonomy even more. Today, women are free to work in virtually every industry, even ones previously dominated by males such as IT, marketing, and finance. While discrimination still exists in treatment and pay, the country's government is stalwart in their efforts to further include women into the labour force.

With an understanding of the country's economic, political and cultural landscape, an evaluation of Red Bull's organization and strategy will be introduced, allowing for greater understanding before addressing the potential opportunities and challenges of Red Bull's business activity within the Kingdom.

Red Bull's Management Strategy

Red Bull's mission is "Giving Wiings to People and Ideas". The brand promotes creativity, performance, and lifestyle enhancement from extreme sports sponsorships to cultural events. Through its vision, Red Bull consistently attaches its products to themes of energy, achievement, and adventure. Within Saudi Arabia, this vision plays into the government's Vision 2030 reforms, which push for youth engagement, entertainment, and sports. The brand's partnerships with esports teams like Team Falcons, sponsorship of Al Hilal Club, and Ramadan campaigns featuring Saudi athletes show how Red Bull has adapted its global message to local cultural values.

Red Bull's target market is typified by a younger demographic, needing energy to maintain their daily activity. These are typically students, young professionals and athletes. The Saudi Arabian energy drink market represents one of the most dynamic segments of the beverage industry. With over 60% of the population under 35, high rates of urbanization, and rising disposable incomes, demand for functional and lifestyle beverages has expanded rapidly. Market estimates place the value of the Saudi energy drink industry at roughly \$398 million in 2024, with projected growth to nearly \$486 million by 2030, translating to an annual growth rate of 3.4%. Other sources estimate the market size as even higher, surpassing one billion dollars when including related beverage categories. Red Bull competes not only with global peers such as Monster and Rockstar but also with strong local competitors including Code Red, Bison, and Boom Boom, who often undercut prices to capture share.

Through a SWOT analysis, Red Bull's strengths, weaknesses, opportunities, and threats can be analyzed. Its strengths include its global brand power, marketing machine, premium image, extensive distribution network, and sugar-free product line, providing international resilience. Red Bull's weaknesses include its premium pricing relative to local competitors and lingering health criticisms over

caffeine and sugar content. Opportunities exist in aligning with rising health awareness through wellness oriented variants and expanding into sports entertainment partnerships under Vision 2030. Threats come from heavy regulation, including mandatory labeling and a 100% excise tax on energy drinks, as well as cultural restrictions that ban sales in government, health, and educational facilities.

Red Bull's Organization

Red Bull GmbH operates as a privately held multinational conglomerate headquartered in Fuschl am See, Austria. The company's ownership is split between the Thai Yoovidhya family (51%) and the estate of co-founder Dietrich Mateschitz. The firm's divisional structure separates the Beverages division (covering core products) from other activities (sports teams, media ventures). This divisional form is a matrix system linking functional areas such as marketing, supply chain, and R&D. This configuration maintains brand coherence while enabling specialization and cross functional collaboration.

In Saudi Arabia, Red Bull operates a greenfield subsidiary established in the early 2000s. It is fully owned by Red Bull GmbH but embedded within the MENA regional cluster. The subsidiary adopts a lean, functional structure modeled after the parent's divisional-matrix design. Core departments include Sales and Distribution, Marketing and Events, Consumer Engagement, and Finance/Regulatory Affairs. Leadership is provided by the Country Manager, Maurice Sabbagh, who reports indirectly to the MENA hub in Dubai.

Organizational mechanisms demonstrate Red Bull's hybrid glocal model. Planning flows from Austria, where long-term strategic direction and brand identity are set, while the Saudi team develops operational plans on a 1–2 year horizon. Decision making authority is shared: Austria retains control over branding, product formulation, and major marketing themes, while the Saudi subsidiary is empowered to make tactical decisions such as staffing, local sponsorships, and distribution partnerships.

Communication flows are constant and bidirectional. Subsidiaries provide biweekly updates to regional leadership and quarterly reports to headquarters. Digital dashboards, intranet platforms, and frequent video conferences ensure integration of global and local perspectives. A typical workflow illustrates this balance: proposals initiated by the Saudi team are reviewed regionally, approved in Austria, executed locally, and then analyzed for performance.

Red Bull's transnational model balances centralized brand oversight with localized responsiveness. While this approach preserves coherence, it also introduces potential delays when local initiatives require Austrian approval. Nonetheless, the system allows Red Bull to safeguard its global image while adapting execution to Saudi cultural and regulatory norms.

Red Bull's Human Capital

Red Bull's culture, as prior mentioned, is entrepreneurial, innovative, and deliberately lean. The company uses traits from its founder Dietrich Mateschitz: speed, creativity, and risk taking. Employees are encouraged to grow their strengths through tools such as Wingfinder, which is Red Bull's strengths assessment. Additionally the company invests in training programs like the Aviator Program for brand ambassadors ("Musketees"), who embody the lifestyle and image of the brand in their interactions with consumers.

The top management team is compact, reflecting Red Bull's private ownership. Leadership changes in recent years have preserved the founder's philosophy of flat hierarchy and minimal bureaucracy. Globally, the company uses a geocentric mentality, balancing global identity with local adaptation. In Saudi Arabia, this translates into a hybrid workforce where expatriates provide strategic expertise, while Saudi nationals fulfill regulatory compliance under Saudization quotas and bring cultural fluency to operations. Country managers serve as boundary spanners between headquarters and the local environment. Their responsibilities include ensuring compliance with Saudi marketing laws, maintaining the global brand image, and training Saudi talent to assume greater managerial roles.

From a cultural lens, Red Bull's human capital policies embody a geocentric orientation but occasionally lean ethnocentric in their heavy reliance on headquarters driven guidelines. This creates tension in balancing global control with local autonomy. Nevertheless, Red Bull's training and personnel development programs demonstrate commitment to building localized capacity while maintaining global standards.

GI/LR Framework

Applying Global Integration vs. Local Responsiveness framework, Red Bull clearly operates as a transnational MNC in Saudi Arabia. Pressures for global integration are high: the company relies on brand consistency, standardized product formulation, and economies of scale. At the same time, pressures for local responsiveness are equally high: cultural norms restrict advertising, regulations impose excise taxes and bans, and consumer preferences demand sugar-free options and locally relevant campaigns. Red Bull's "glocal" approach reflects this balance. Headquarters dictates global pillars, but subsidiaries adapt campaigns to local contexts. This dual orientation enables Red Bull to maintain its premium global identity while resonating with Saudi consumers.

The model is not without challenges. Heavy reliance on centralized decision making can delay responsiveness, and the premium price point remains vulnerable to local competition. Red Bull's organizational flexibility, geocentric staffing, and cultural integration strategies provide resilience.

Overall, Red Bull's Saudi subsidiary exemplifies how a transnational strategy can succeed when global oversight is carefully balanced with local autonomy.

Opportunities and Challenges in the Saudi Arabian Market, Recommendations for Red Bull

Now that there is a strong understanding of Red Bull's organization and strategy both at home and abroad, we can center the remainder of this analysis on the opportunities and challenges that Red Bull faces while operating in Saudi Arabia.

Red Bull, while having a large market of customers to serve in Saudi Arabia, faces challenges in reaching it. The Saudi Arabian energy drink industry is particularly active, partly due to the country's current demographics, with 60% of the population under the age of 35. Energy drinks are popular amongst college students, young professionals, and athletes who benefit from the energy boost of its ingredients, caffeine and taurine. The energy drink market in Saudi Arabia was valued at 398 million U.S. dollars in 2024 with projections to reach 486 million by year 2030. If this project proves accurate, there will be a steady annual growth rate in market size of about 3.4%, a huge opportunity for Red Bull should they be able to capture it.

While consumer demand is present, Red Bull must compete with rival brands and competitive pricing, while persevering against government regulations and taxes to actualize the value of this growing market. Red Bull's competition in the Kingdom are international names such as Monster and Rockstar, but also local Saudi-based competitors like Code Red, Bison, and Boom Boom. The competition is especially sharp against local brands given their ability to undercut prices against international competitors, effectively retaining larger market share. In addition to competition, government regulations pose added pricing complexity to Red Bull's operations in Saudi. Since 2017, energy drinks have had a 100% excise tax placed on them, regardless of whether they are domestic or international. This policy has raised the retail price significantly and discourages over-consumption, creating a roadblock for Red Bull as they are positioned in a higher price point than most of their competitors.

Red Bull's headquarters is currently the sole spearhead of business strategy which can make agile adaptation to a changing local market difficult. However, with Saudi Arabia's tight state control, it is necessary. Given this, our recommendation would be to allow the local subsidiary greater autonomy in discretion when it comes to market positioning and price point, removing the wait time for HQ approval. This greater autonomy would only be in the energy drink product line, allowing this freedom only to this portion of the management team to prevent losing the strong hierarchical organization of Red Bull.

In addition to the market potential in Saudi Arabia, Red Bull has the opportunity to utilize its tested brand power to align with the country's Vision 2030 initiatives and capture it. Red Bull's mission of "Giving Wings to People and Ideas", creating an energized culture positions itself well to integrate its

advertising and brand into the expanding sports and entertainment industry promised by the country's initiative. Additionally, the Red Bull brand is hallmarked by extreme adventure and achievement orienting well to their masculine culture. With the government's initiatives focused primarily on the younger generation, Red Bull has the opportunity to expand its market share across its drink and other product lines from increased brand exposure through its F1 team, continued partnerships with Saudi Arabian athletes such as Dania Aqeel and stunt-bike rider Shadi AlDhaheri. This will continue to align its brand image with local transformation, reinforcing its premium, high-energy image within the market.

Another challenge for Red Bull's subsidiary in Saudi Arabia stems from the friction between the brand's global identity and the country's specific cultural and regulatory environment. Saudi Arabia is described as a "complex market" due to religious (halal) considerations and health concerns around caffeine. This has led to staunch restrictions, such as the ban on energy drinks in government, health, and educational facilities. This environment directly conflicts with Red Bull's foundational strategy of ubiquitous availability and its historical association with nightlife and social gatherings.

The caution that Red Bull must take is adhering to strict advertisement guidelines, respecting their cultural values of modesty. Rather than attempting to replicate the European model, it should continue to pivot its brand association away from nightlife and more intensely towards mainstream national pastimes that resonate with local values, such as spending late nights with family during Ramadan. There have been restrictions on energy drink advertisements in the past and are still limitations on where energy drinks can be sold. Red Bull, who organizationally resorts most of its marketing strategy to Headquarters, should rely on their local Saudi Arabian team to direct the narrative of advertisements and partnerships in the region to ensure a comprehensive strategy dedicated to this region.

Another significant organizational challenge lies in the workflow and decision-making processes between the Austrian headquarters and the Saudi subsidiary. The structure, which requires local proposals to be reviewed regionally at MENA HQ before being sent and approved by HQ in Austria, is designed to maintain brand consistency but risks creating bureaucratic delays and misunderstandings. Headquarters' control over all "major marketing theme decisions" could stifle the agility needed for the Saudi team to react swiftly to local market trends and cultural nuances. This could cause a problem where a campaign that is highly relevant in Saudi Arabia is either rejected or delayed by decision-makers in Austria who may not fully grasp the local context, despite the bidirectional communication flows in place.

To answer this challenge, Red Bull could refine its "glocal" model by empowering Saudi Arabia with greater creative authority within a set of predefined global brand principles. Instead of approving every major theme, the headquarters could establish a clear framework of non-negotiable brand pillars and a "brand playbook" for guidance, then trust the local experts to develop campaigns that adhere to it. Additionally, facilitating more direct collaboration between the Saudi marketing team and the global

brand team in Austria for major campaigns could even out the hierarchy, reduce reliance on the regional intermediary, and foster a deeper, shared understanding of strategic goals and local realities.

Obesity and diabetes is a growing problem for the people of Saudi Arabia. In response, within Vision 2030, the Saudi government has made preserving health a top priority. The Saudi Food and Drug Authority requires energy drinks to be registered, labeled in Arabic, and display mandatory health warnings. Moreover, to dissuade consumers from purchasing products that are known harmful to health, excise taxes have been installed on these products.

In order to retain market share amidst government pushes towards healthier consumption and rival competition, Red Bull should promote their sugar-free product line significantly more than their other beverages. Going a step further, Red Bull's organizational strategy in Saudi Arabia could be to become the sugar-free energy drink of choice by local sports teams, like Team Falcons who were recently crowned champions of the esports World Cup in 2025. EA Sports was recently acquired by Saudi Arabia in part and will certainly be a big part of their gaming culture in years to come.

Finally, a challenge facing Red Bull is the integration of the female population of Saudi Arabia into their market. The female population in Saudi Arabia represents a growing yet complex segment for the energy drink market, with distinct views and opportunities. The expanding roles of women in Saudi society present a crucial growth opportunity for Red Bull. As more women enter the workforce, pursue higher education, and engage in sports and public life, the demand for products that offer an energy boost increases. However, balancing practical needs with health and cultural awareness again comes into the equation for Saudi women.

To face this challenge, we recommend that Red Bull continue to address this crucial segment of their market in their marketing campaigns while working to obtain the female Saudi perspective from within the organization by conducting market surveys and other outreach that include this demographic. Red Bull is already adapting its marketing to be more inclusive; the "Unusual as Usual Ramadan" campaign is a prime example of this strategy. By featuring Dania Aqeel, a prominent Saudi female rally driver, Red Bull shifted the focus from traditional, male-dominated extreme sports to a narrative of individual strength, uniqueness, and personal achievement. We recommend continuing this strategy, while also staying in touch with the Saudi female consumer through market survey and other local outreach to get at the true heart of this growing market.

Conclusion

Red Bull's position in Saudi Arabia represents both significant opportunity and considerable challenge. The Kingdom offers a compelling market proposition: a young, energetic population with 60% under the age of 35, a growing energy drink market projected to reach \$486 million by 2030, and a

national transformation agenda that aligns remarkably well with Red Bull's brand identity of energy, performance, and achievement. The company's unparalleled brand power, global recognition, and sophisticated marketing infrastructure provide a strong foundation for success in this dynamic market.

This potential requires Red Bull to navigate a complex landscape of regulatory constraints, cultural sensitivities, and competitive pressures. The 100% excise tax on energy drinks, strict advertising regulations, and growing health consciousness among Saudi consumers demand strategic adaptation rather than simple replication of the company's European playbook. Local competitors with lower price points and the restrictions on sales in government, health, and educational facilities further complicate market penetration.

The path forward lies in strategic localization within Red Bull's global framework. The company must empower its Saudi subsidiary with greater autonomy in pricing decisions and marketing execution while maintaining alignment with core brand principles. This refined "glocal" approach should prioritize deep cultural integration through partnerships with local athletes like Dania Aqeel, alignment with Vision 2030 initiatives, and culturally appropriate campaigns that respect Saudi values while celebrating individual achievement and ambition.

Three strategic priorities emerge as critical for Red Bull's sustained success in Saudi Arabia. First, the company must aggressively promote its sugar-free product line to address health concerns and position itself as the premium choice for health-conscious consumers. Second, Red Bull should leverage its sponsorship capabilities to embed itself in the Kingdom's expanding sports and entertainment ecosystem, from esports championships to traditional athletic events. Third, the company must authentically engage Saudi Arabia's growing female demographic through inclusive marketing and genuine market research that captures their evolving needs and aspirations.

Red Bull's success in Saudi Arabia will ultimately depend on its ability to balance global consistency with local relevance. The company has the brand strength, product portfolio, and marketing expertise to capture great value in this growing market. By respecting cultural boundaries while prioritizing individual achievement, promoting healthier options while maintaining its premium positioning, and empowering local decision-making while preserving brand integrity, Red Bull can transform the challenges of the Saudi market into a sustainable competitive advantage. The opportunity is substantial, but it requires presence, genuine cultural partnerships, and strategic adaptation.

Appendix

Country Analysis

Table 1 - Economic Statistics Comparison 2014 - 2024

2014	Measure	2024
\$787.15 billion	Nominal GDP	\$1.24 trillion
\$1.77 trillion	GDP (PPP)	\$2.213 trillion
\$58,872	GDP per Capita	\$62,7000
4%	GDP Growth Rate	1.8%

Sources: WorldBank Group

Table 2 - Top Companies in Saudi Arabia

Companies	Product
Saudi Aramco	Energy
SABIC	Petrochemicals
Al Rajhi Bank	Financial services
NEOM	(flagship project; public-private venture)
Saudi Telecom Company	(telecom/digital services)

Sources: WorldBank Group

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