



Euromonitor
International

Consumer Foodservice By Location in Saudi Arabia

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Retail and standalone outlets drive growth in consumer foodservice during 2025

INDUSTRY PERFORMANCE

Consumer foodservice through retail leads non-standalone growth in Saudi Arabia

Standalone records a rise in 2025 as consumers seek clearer, purpose-led visits

Value-for-money increasingly shapes location choices in 2025

WHAT'S NEXT?

Consumer foodservice through retail is expected to lead non-standalone growth

Saudi foodservice locations face both challenges and opportunities as consumer routines evolve

Demographic shifts will increasingly shape the performance of consumer foodservice

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DISCLAIMER

Consumer Foodservice in Saudi Arabia - Industry Overview

EXECUTIVE SUMMARY

Foodservice value in 2025 is driven by cafés, quick meals and experiential dining

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Out-of-home routines and lifestyle destinations drive value growth for consumer foodservice

Convenience drives strategic fulfilment choices during 2025

Experiential dining gains importance as consumers seek memorable social

WHAT'S NEXT?

Growth is expected to be driven by destination dining, cafés and quick service options

Format, menu and digital innovation will reshape how operators compete

Sustainability is set to gain relevance as consumers expectations rise

COMPETITIVE LANDSCAPE

McDonald's records a slight decline as Dunkin' improves its share in 2025

Joe & The Juice A/S posts strong value growth through its lifestyle positioning

Expansion accelerates as chains compete for prime sites in new lifestyle districts

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Independents retain value share while chains outpace growth through expansion and convenience

Chains scale innovation while independents focus on hyper-local adaptation

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- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
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