



**Euromonitor
International**

Consumer Foodservice in Saudi Arabia

March 2026

Table of Contents

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

CHANNELS

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

Chains scale innovation while independents focus on hyper-local adaptation

MARKET DATA

Table 1 - Units, Transactions and Value Sales in Consumer Foodservice 2020-2025

Table 2 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2020-2025

Table 3 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2025

Table 4 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2020-2025

Table 5 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2020-2025

Table 6 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2025

Table 7 - Sales in Consumer Foodservice by Location: % Foodservice Value 2020-2025

Table 8 - Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2020-2025

Table 9 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2021-2025

Table 10 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2022-2025

Table 11 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2025

Table 12 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2025-2030

Table 13 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2025-2030

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Cafés/Bars in Saudi Arabia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Specialty coffee culture and urban lifestyles support growth for cafés/bars in Saudi Arabia

INDUSTRY PERFORMANCE

Saudi Arabia's cafés/bars grow as specialty coffee culture drives frequent visits

Specialist coffee and tea shops lead growth in Saudi Arabia's cafés/bars

Consumer behaviour shapes fulfilment patterns in Saudi cafés and bars

WHAT'S NEXT?

Rising coffee culture and urban lifestyles are set to support growth in Saudi cafés/bars

Digital and flexible fulfilment is expected to enhance convenience over the forecast period

Cafés/bars are set to innovate with locally inspired beverages and occasion-based offerings

COMPETITIVE LANDSCAPE

Shahia Food Ltd Co strengthens Dunkin's position as a go-to brand for everyday coffee and treats

Joe & The Juice drives rapid growth through strategic expansion and wellness-focused offerings

Chains dominate due to scale, visibility and stronger digital integration

CATEGORY DATA

Table 14 - Cafés/Bars by Category: Units/Outlets 2020-2025

Table 15 - Sales in Cafés/Bars by Category: Number of Transactions 2020-2025

Table 16 - Sales in Cafés/Bars by Category: Foodservice Value 2020-2025

Table 17 - Cafés/Bars by Category: % Units/Outlets Growth 2020-2025

Table 18 - Sales in Cafés/Bars by Category: % Transaction Growth 2020-2025

Table 19 - Sales in Cafés/Bars by Category: % Foodservice Value Growth 2020-2025

Table 20 - GBO Company Shares in Chained Cafés/Bars: % Foodservice Value 2021-2025

Table 21 - GBN Brand Shares in Chained Cafés/Bars: % Foodservice Value 2022-2025

Table 22 - Forecast Cafés/Bars by Category: Units/Outlets 2025-2030

Table 23 - Forecast Sales in Cafés/Bars by Category: Number of Transactions 2025-2030

Table 24 - Forecast Sales in Cafés/Bars by Category: Foodservice Value 2025-2030

Table 25 - Forecast Cafés/Bars by Category: % Units/Outlets Growth 2025-2030

Table 26 - Forecast Sales in Cafés/Bars by Category: % Transaction Growth 2025-2030

Table 27 - Forecast Sales in Cafés/Bars by Category: % Foodservice Value Growth 2025-2030

DISCLAIMER

[Full-Service Restaurants in Saudi Arabia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Experience-driven growth and innovation fuel full-service restaurant in 2025

INDUSTRY PERFORMANCE

Growth for full-service restaurants is driven by experience-led dining and expanding lifestyle zones

Middle Eastern full-service restaurants drive growth as operators modernise traditional dishes

Value for money drives selective dining choices in full-service restaurants in 2025

WHAT'S NEXT?

Growth for full-service restaurants is expected to be supported by destination dining and social culture

Evolving fulfilment in full-service restaurants will blend dine-in tradition with convenience-led ordering

Innovation in full-service restaurants is set to emphasise experiences and occasion-led differentiation

COMPETITIVE LANDSCAPE

Alfa Co for Operation Services Ltd hybrid format and network-wide upgrades drive its leadership

AWANI Group was the most dynamic full-service restaurant company in 2025

Independents lead full-service restaurants due to scale, diversity and cultural fit

CATEGORY DATA

Table 28 - Full-Service Restaurants by Category: Units/Outlets 2020-2025

Table 29 - Sales in Full-Service Restaurants by Category: Number of Transactions 2020-2025
Table 30 - Sales in Full-Service Restaurants by Category: Foodservice Value 2020-2025
Table 31 - Full-Service Restaurants by Category: % Units/Outlets Growth 2020-2025
Table 32 - Sales in Full-Service Restaurants by Category: % Transaction Growth 2020-2025
Table 33 - Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2020-2025
Table 34 - GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2021-2025
Table 35 - GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value 2022-2025
Table 36 - Forecast Full-Service Restaurants by Category: Units/Outlets 2025-2030
Table 37 - Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2025-2030
Table 38 - Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2025-2030
Table 39 - Forecast Full-Service Restaurants by Category: % Units/Outlets Growth 2025-2030
Table 40 - Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2025-2030
Table 41 - Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2025-2030

DISCLAIMER

Limited-Service Restaurants in Saudi Arabia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Tourism, demographics, and digitalisation fuel growth in Saudi Arabia's limited-service restaurants

INDUSTRY PERFORMANCE

Tourism expansion, demographic shifts and digital adoption drive growth

Chicken, fish and convenience-store formats drive momentum in limited-service restaurants

Delivery platforms and value-focused behaviour shape fulfilment in limited-service restaurants

WHAT'S NEXT?

Younger demographics, Vision 2030 and digital expansion are expected to sustain growth in limited-service restaurants

Intensifying platform competition to reshape fulfilment dynamics in limited-service restaurants

Flavour-led launches and limited-time offers are set to anchor innovation

COMPETITIVE LANDSCAPE

Global franchise groups maintain leadership despite intensifying competition

Premium patisserie concepts drive rapid growth in Saudi Arabia's limited-service restaurants

Chained operators lead limited-service restaurants due to scale, visibility and digital integration

CATEGORY DATA

Table 42 - Limited-Service Restaurants by Category: Units/Outlets 2020-2025
Table 43 - Sales in Limited-Service Restaurants by Category: Number of Transactions 2020-2025
Table 44 - Sales in Limited-Service Restaurants by Category: Foodservice Value 2020-2025
Table 45 - Limited-Service Restaurants by Category: % Units/Outlets Growth 2020-2025
Table 46 - Sales in Limited-Service Restaurants by Category: % Transaction Growth 2020-2025
Table 47 - Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2020-2025
Table 48 - GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2021-2025
Table 49 - GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2022-2025
Table 50 - Forecast Limited-Service Restaurants by Category: Units/Outlets 2025-2030
Table 51 - Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2025-2030
Table 52 - Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2025-2030
Table 53 - Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2025-2030
Table 54 - Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2025-2030
Table 55 - Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2025-2030

DISCLAIMER

Self-Service Cafeterias in Saudi Arabia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Self-service cafeterias in Saudi Arabia record modest growth, but face gradual long-term decline

INDUSTRY PERFORMANCE

Self-service cafeterias see steady growth supported by IKEA in Saudi Arabia

Chained formats drive growth as independents are effectively absent

Value and efficiency drive the performance of self-service cafeterias in 2025

WHAT'S NEXT?

Self-service cafeterias face a gradual decline as consumer preferences shift

The evolution of fulfilment will further narrow the role of self-service cafeterias

Self-service cafeterias face structural limits and low level innovation

COMPETITIVE LANDSCAPE

IKEA maintains its dominance in self-service cafeterias despite limited growth

Food & Entertainment Co leads growth in self-service cafeterias through modern, lifestyle-focused offering

Self-service cafeterias remain a chained-dominated format in Saudi Arabia

CATEGORY DATA

Table 56 - Self-Service Cafeterias: Units/Outlets 2020-2025

Table 57 - Sales in Self-Service Cafeterias: Number of Transactions 2020-2025

Table 58 - Sales in Self-Service Cafeterias: Foodservice Value 2020-2025

Table 59 - Sales in Self-Service Cafeterias: % Units/Outlets Growth 2020-2025

Table 60 - Sales in Self-Service Cafeterias: % Transaction Growth 2020-2025

Table 61 - Sales in Self-Service Cafeterias: % Foodservice Value Growth 2020-2025

Table 62 - GBO Company Shares in Chained Self-Service Cafeterias: % Foodservice Value 2021-2025

Table 63 - GBN Brand Shares in Chained Self-Service Cafeterias: % Foodservice Value 2022-2025

Table 64 - Forecast Self-Service Cafeterias: Units/Outlets 2025-2030

Table 65 - Forecast Sales in Self-Service Cafeterias: Number of Transactions 2025-2030

Table 66 - Forecast Sales in Self-Service Cafeterias: Foodservice Value 2025-2030

Table 67 - Forecast Self-Service Cafeterias: % Units/Outlets Growth 2025-2030

Table 68 - Forecast Sales in Self-Service Cafeterias: % Transaction Growth 2025-2030

Table 69 - Forecast Sales in Self-Service Cafeterias: % Foodservice Value Growth 2025-2030

DISCLAIMER

Street Stalls/Kiosks in Saudi Arabia

KEY DATA FINDINGS

2025 DEVELOPMENTS

Growth is supported by Vision 2030 lifestyle districts, festivals, and tourism events

INDUSTRY PERFORMANCE

Street stalls/kiosks gain ground in 2025, driven by rising leisure footfall

Chained street stalls/kiosks lead growth due to strong visibility and prime placements

Affordable indulgence drives street stalls/kiosk resilience in 2025

WHAT'S NEXT?

Lifestyle and tourism expansion is expected to drive growth for street stalls/kiosks
Faster fulfilment is set to become central to street stalls/kiosks competitiveness
Modular formats and localised menus are expected to shape street stalls/kiosks innovation

COMPETITIVE LANDSCAPE

Kyan Cafe Co leads through a high-traffic presence and trusted kiosk formats
New Bon Café Co leads street stalls/kiosks growth with speed, relevance and value
Chained street stalls/kiosks lead snack occasions with scale, convenience and visibility

CATEGORY DATA

- Table 70 - Street Stalls/Kiosks: Units/Outlets 2020-2025
- Table 71 - Sales in Street Stalls/Kiosks: Number of Transactions 2020-2025
- Table 72 - Sales in Street Stalls/Kiosks: Foodservice Value 2020-2025
- Table 73 - Street Stalls/Kiosks: % Units/Outlets Growth 2020-2025
- Table 74 - Sales in Street Stalls/Kiosks: % Transaction Growth 2020-2025
- Table 75 - Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2020-2025
- Table 76 - GBO Company Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2021-2025
- Table 77 - GBN Brand Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2022-2025
- Table 78 - Forecast Street Stalls/Kiosks: Units/Outlets 2025-2030
- Table 79 - Forecast Sales in Street Stalls/Kiosks: Number of Transactions 2025-2030
- Table 80 - Forecast Sales in Street Stalls/Kiosks: Foodservice Value 2025-2030
- Table 81 - Forecast Street Stalls/Kiosks: % Units/Outlets Growth 2025-2030
- Table 82 - Forecast Sales in Street Stalls/Kiosks: % Transaction Growth 2025-2030
- Table 83 - Forecast Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2025-2030

DISCLAIMER

[Consumer Foodservice By Location in Saudi Arabia](#)

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

CATEGORY DATA

- Table 84 - Consumer Foodservice by Location: Units/Outlets 2020-2025
- Table 85 - Sales in Consumer Foodservice by Location: Number of Transactions 2020-2025
- Table 86 - Sales in Consumer Foodservice by Location: Foodservice Value 2020-2025
- Table 87 - Consumer Foodservice by Location: % Units/Outlets Growth 2020-2025
- Table 88 - Sales in Consumer Foodservice by Location: % Transaction Growth 2020-2025
- Table 89 - Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2020-2025
- Table 90 - Consumer Foodservice Through Standalone: Units/Outlets 2020-2025
- Table 91 - Sales in Consumer Foodservice Through Standalone: Number of Transactions 2020-2025
- Table 92 - Sales in Consumer Foodservice Through Standalone: Foodservice Value 2020-2025

Table 93 - Consumer Foodservice Through Standalone: % Units/Outlets Growth 2020-2025

Table 94 - Sales in Consumer Foodservice Through Standalone: % Transaction Growth 2020-2025

Table 95 - Sales in Consumer Foodservice Through Standalone: % Foodservice Value Growth 2020-2025

Table 96 - Consumer Foodservice Through Leisure: Units/Outlets 2020-2025

Table 97 - Sales in Consumer Foodservice Through Leisure: Number of Transactions 2020-2025

Table 98 - Sales in Consumer Foodservice Through Leisure: Foodservice Value 2020-2025

Table 99 - Consumer Foodservice Through Leisure: % Units/Outlets Growth 2020-2025

Table 100 - Sales in Consumer Foodservice Through Leisure: % Transaction Growth 2020-2025

Table 101 - Sales in Consumer Foodservice Through Leisure: % Foodservice Value Growth 2020-2025

Table 102 - Consumer Foodservice Through Retail: Units/Outlets 2020-2025

Table 103 - Sales in Consumer Foodservice Through Retail: Number of Transactions 2020-2025

Table 104 - Sales in Consumer Foodservice Through Retail: Foodservice Value 2020-2025

Table 105 - Consumer Foodservice Through Retail: % Units/Outlets Growth 2020-2025

Table 106 - Sales in Consumer Foodservice Through Retail: % Transaction Growth 2020-2025

Table 107 - Sales in Consumer Foodservice Through Retail: % Foodservice Value Growth 2020-2025

Table 108 - Consumer Foodservice Through Lodging: Units/Outlets 2020-2025

Table 109 - Sales in Consumer Foodservice Through Lodging: Number of Transactions 2020-2025

Table 110 - Sales in Consumer Foodservice Through Lodging: Foodservice Value 2020-2025

Table 111 - Consumer Foodservice Through Lodging: % Units/Outlets Growth 2020-2025

Table 112 - Sales in Consumer Foodservice Through Lodging: % Transaction Growth 2020-2025

Table 113 - Sales in Consumer Foodservice Through Lodging: % Foodservice Value Growth 2020-2025

Table 114 - Consumer Foodservice Through Travel: Units/Outlets 2020-2025

Table 115 - Sales in Consumer Foodservice Through Travel: Number of Transactions 2020-2025

Table 116 - Sales in Consumer Foodservice Through Travel: Foodservice Value 2020-2025

Table 117 - Consumer Foodservice Through Travel: % Units/Outlets Growth 2020-2025

Table 118 - Sales in Consumer Foodservice Through Travel: % Transaction Growth 2020-2025

Table 119 - Sales in Consumer Foodservice Through Travel: % Foodservice Value Growth 2020-2025

Table 120 - Forecast Consumer Foodservice by Location: Units/Outlets 2025-2030

Table 121 - Forecast Sales in Consumer Foodservice by Location: Number of Transactions 2025-2030

Table 122 - Forecast Sales in Consumer Foodservice by Location: Foodservice Value 2025-2030

Table 123 - Forecast Consumer Foodservice by Location: % Units/Outlets Growth 2025-2030

Table 124 - Forecast Sales in Consumer Foodservice by Location: % Transaction Growth 2025-2030

Table 125 - Forecast Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2025-2030

Table 126 - Forecast Consumer Foodservice Through Standalone: Units/Outlets 2025-2030

Table 127 - Forecast Sales in Consumer Foodservice Through Standalone: Number of Transactions 2025-2030

Table 128 - Forecast Sales in Consumer Foodservice Through Standalone: Foodservice Value 2025-2030

Table 129 - Forecast Consumer Foodservice Through Standalone: % Units/Outlets Growth 2025-2030

Table 130 - Forecast Sales in Consumer Foodservice Through Standalone: % Transaction Growth 2025-2030

Table 131 - Forecast Sales in Consumer Foodservice Through Standalone: % Foodservice Value Growth 2025-2030

Table 132 - Forecast Consumer Foodservice Through Leisure: Units/Outlets 2025-2030

Table 133 - Forecast Sales in Consumer Foodservice Through Leisure: Number of Transactions 2025-2030

Table 134 - Forecast Sales in Consumer Foodservice Through Leisure: Foodservice Value 2025-2030

Table 135 - Forecast Consumer Foodservice Through Leisure: % Units/Outlets Growth 2025-2030

Table 136 - Forecast Sales in Consumer Foodservice Through Leisure: % Transaction Growth 2025-2030

Table 137 - Forecast Sales in Consumer Foodservice Through Leisure: % Foodservice Value Growth 2025-2030

Table 138 - Forecast Consumer Foodservice Through Retail: Units/Outlets 2025-2030

Table 139 - Forecast Sales in Consumer Foodservice Through Retail: Number of Transactions 2025-2030

Table 140 - Forecast Sales in Consumer Foodservice Through Retail: Foodservice Value 2025-2030

Table 141 - Forecast Consumer Foodservice Through Retail: % Units/Outlets Growth 2025-2030

Table 142 - Forecast Sales in Consumer Foodservice Through Retail: % Transaction Growth 2025-2030

Table 143 - Forecast Sales in Consumer Foodservice Through Retail: % Foodservice Value Growth 2025-2030

Table 144 - Forecast Consumer Foodservice Through Lodging: Units/Outlets 2025-2030

Table 145 - Forecast Sales in Consumer Foodservice Through Lodging: Number of Transactions 2025-2030

Table 146 - Forecast Sales in Consumer Foodservice Through Lodging: Foodservice Value 2025-2030

Table 147 - Forecast Consumer Foodservice Through Lodging: % Units/Outlets Growth 2025-2030

Table 148 - Forecast Sales in Consumer Foodservice Through Lodging: % Transaction Growth 2025-2030

Table 149 - Forecast Sales in Consumer Foodservice Through Lodging: % Foodservice Value Growth 2025-2030

Table 150 - Forecast Consumer Foodservice Through Travel: Units/Outlets 2025-2030

Table 151 - Forecast Sales in Consumer Foodservice Through Travel: Number of Transactions 2025-2030

Table 152 - Forecast Sales in Consumer Foodservice Through Travel: Foodservice Value 2025-2030

Table 153 - Forecast Consumer Foodservice Through Travel: % Units/Outlets Growth 2025-2030

Table 154 - Forecast Sales in Consumer Foodservice Through Travel: % Transaction Growth 2025-2030

Table 155 - Forecast Sales in Consumer Foodservice Through Travel: % Foodservice Value Growth 2025-2030

DISCLAIMER

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **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.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/consumer-foodservice-in-saudi-arabia/report.