



Euromonitor
International

Full-Service Restaurants in Saudi Arabia

March 2026

Table of Contents

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

Table 2 - Sales in Full-Service Restaurants by Category: Number of Transactions 2020-2025

Table 3 - Sales in Full-Service Restaurants by Category: Foodservice Value 2020-2025

Table 4 - Full-Service Restaurants by Category: % Units/Outlets Growth 2020-2025

Table 5 - Sales in Full-Service Restaurants by Category: % Transaction Growth 2020-2025

Table 6 - Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2020-2025

Table 7 - GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2021-2025

Table 8 - GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value 2022-2025

Table 9 - Forecast Full-Service Restaurants by Category: Units/Outlets 2025-2030

Table 10 - Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2025-2030

Table 11 - Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2025-2030

Table 12 - Forecast Full-Service Restaurants by Category: % Units/Outlets Growth 2025-2030

Table 13 - Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2025-2030

Table 14 - Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2025-2030

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

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

Table 16 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2020-2025

Table 17 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2025

Table 18 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2020-2025

Table 19 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2020-2025

Table 20 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2025

Table 21 - Sales in Consumer Foodservice by Location: % Foodservice Value 2020-2025

Table 22 - Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2020-2025

Table 23 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2021-2025

Table 24 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2022-2025

Table 25 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2025

Table 26 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2025-2030

Table 27 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2025-2030

DISCLAIMER

SOURCES

Summary 1 - Research Sources

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/full-service-restaurants-in-saudi-arabia/report.