



# Consumer Foodservice in Saudi Arabia

March 2026

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## Consumer Foodservice in Saudi Arabia

### 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 fulfillment 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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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

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##### 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

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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

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### Self-Service Cafeterias in Saudi Arabia

#### KEY DATA FINDINGS

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##### 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

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### Street Stalls/Kiosks in Saudi Arabia

#### KEY DATA FINDINGS

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##### 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  
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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?

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