



Euromonitor
International

Staple Foods in Saudi Arabia

November 2025

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Staple Foods in Saudi Arabia

EXECUTIVE SUMMARY

Despite ongoing price sensitivity demand for staple foods remains robust

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Sales see steady growth with little change in consumer purchasing behaviour

Value remains the key consideration in many purchasing decisions

Saudisation policy favouring local production

WHAT'S NEXT?

Key staples will remain at the heart of the market

Competition set to intensify as the market evolves

Distribution landscape shifting towards an omnichannel approach

COMPETITIVE LANDSCAPE

Artisanal baked goods lead the market

Competition remains lively as players invest in production improvements and marketing

CHANNELS

Supermarkets and hypermarkets dominate sales

Discounters and e-commerce carving out a share in the market

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Baked Goods in Saudi Arabia

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2025 DEVELOPMENTS

Bread remains at the heart of most family meals

Fresh flat bread remains at the heart of Saudi mealtimes despite financial pressures

Unpackaged flat bread the clear winner

WHAT'S NEXT?

Steady growth set to be led by fresh bread and a wider choice of products

Simpler recipes and more use of wholegrains as consumers look for healthier options
Improved planning should help reduce waste

COMPETITIVE LANDSCAPE

Artisanal dominates baked goods
Deemah finding success with its packaged cakes

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Supermarkets remains the key distribution channel thanks to its broad offer
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[Breakfast Cereals in Saudi Arabia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Breakfast cereals remain a key feature of Saudi morning routines

INDUSTRY PERFORMANCE

Sales rise thanks to the convenience of breakfast cereals in busy morning routines
Hot cereals thriving thanks to new product development and their healthy image

WHAT'S NEXT?

Steady growth predicted for breakfast cereals fuelled by hot cereals and flakes
Health and wellness, simpler recipes and cleaner labels
Better planning should mean less waste

COMPETITIVE LANDSCAPE

Quaker leads with tried and tested oats
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CHANNELS

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INDUSTRY PERFORMANCE

Consumers stockpile shelf stable products as an affordable and convenient ingredient

Versatility of shelf stable vegetables and tomatoes fuels demand

WHAT'S NEXT?

Sales will continue to rise, led by frozen vegetables and core pantry staples

Health and simplicity will shape launches and pack formats

Local supply chains set to improve with a growing focus on sustainability

COMPETITIVE LANDSCAPE

California Garden retains a strong lead in 2025 with popular favourites

Al Munajjam tapping into the demand for convenient and quick meals and sides

CHANNELS

Modern grocery retailers increase their dominance in 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Sales continue to rise thanks to the key role of poultry and tuna in the Saudi diet

INDUSTRY PERFORMANCE

Processed meat and seafood remain a key feature of Saudi meals

Frozen processed poultry successfully taps into local consumption habits

WHAT'S NEXT?

Sales will rise, led by poultry and shelf stable seafood

Health focus shifts to cleaner labels and lighter seasonings

Local supply and cold-chain upgrades should boost sales and online availability

COMPETITIVE LANDSCAPE

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CHANNELS

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[Rice, Pasta and Noodles in Saudi Arabia](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Rice remains the core staple but rice and noodles receiving strong interest

INDUSTRY PERFORMANCE

Rice remains the dominant category but pasta sales are on the rise

Instant noodle pouches winning favour with low prices and quick cooking time

WHAT'S NEXT?

Bright outlook for rice, pasta and noodles

Health focus will reward simpler recipes and lighter cooking

Local operations and digital tools should help drive the next growth phase

COMPETITIVE LANDSCAPE

Abu Kas holds the lead with popular line of basmati rice
Korean noodles see a surge in demand from younger consumers

CHANNELS

Supermarkets and hypermarkets dominate with a broad offer and competitive prices
E-commerce seeing improvements with consumers attracted to its increasing convenience

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