



**Euromonitor  
International**

# Processed Meat, Seafood and Alternatives To Meat in Saudi Arabia

November 2025



## 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

National Food Co leads

Tanmiah benefiting from investment in expanding its production capacity

### CHANNELS

Supermarkets lead thanks to a wide offer and frequent promotions

Trust in e-commerce grows fuelling online sales

### CATEGORY DATA

Table 1 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2020-2025

Table 2 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2020-2025

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[Staple Foods in Saudi Arabia - Industry Overview](#)

### 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

## MARKET DATA

Table 15 - Sales of Staple Foods by Category: Volume 2020-2025  
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## SOURCES

Summary 1 - Research Sources

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For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/processed-meat-seafood-and-alternatives-to-meat-in-saudi-arabia/report](http://www.euromonitor.com/processed-meat-seafood-and-alternatives-to-meat-in-saudi-arabia/report).