



Euromonitor
International

Limited-Service Restaurants in Saudi Arabia

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Table of Contents

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 1 - Limited-Service Restaurants by Category: Units/Outlets 2020-2025
- Table 2 - Sales in Limited-Service Restaurants by Category: Number of Transactions 2020-2025
- Table 3 - Sales in Limited-Service Restaurants by Category: Foodservice Value 2020-2025
- Table 4 - Limited-Service Restaurants by Category: % Units/Outlets Growth 2020-2025
- Table 5 - Sales in Limited-Service Restaurants by Category: % Transaction Growth 2020-2025
- Table 6 - Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2020-2025
- Table 7 - GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2021-2025
- Table 8 - GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2022-2025
- Table 9 - Forecast Limited-Service Restaurants by Category: Units/Outlets 2025-2030
- Table 10 - Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2025-2030
- Table 11 - Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2025-2030
- Table 12 - Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2025-2030
- Table 13 - Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2025-2030
- Table 14 - Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2025-2030

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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

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SOURCES

Summary 1 - Research Sources

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