

## **Saudi Arabia Ecommerce - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

Market Report | 2026-01-16 | 101 pages | Mordor Intelligence

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### **Report description:**

Saudi Arabia Ecommerce Market Analysis

Saudi Arabia Ecommerce Market size in 2026 is estimated at USD 31.29 billion, growing from 2025 value of USD 27.96 billion with 2031 projections showing USD 54.87 billion, growing at 11.92% CAGR over 2026-2031.

Underscoring the Kingdom's rapid digital-commerce transition. Momentum stems from Vision 2030 infrastructure investments, 99% internet penetration, and 78% 5G coverage, which together create an always-connected consumer base. Cash-to-card migration via the Mada network, surging Gen-Z social-commerce engagement, and AI-powered last-mile innovations further accelerate uptake. Platforms integrate biometric payments and dark-store logistics to lift conversion rates and compress delivery times, while regulatory clarity around the Personal Data Protection Law (PDPL) increases shopper confidence and raises entry barriers for under-capitalized newcomers. Competitive dynamics feature Amazon.sa, Noon and fast-growing local enablers Zid and Salla scaling AI personalization and SME onboarding, even as high rural fulfilment costs temper nationwide adoption.

Saudi Arabia Ecommerce Market Trends and Insights

99% Internet Penetration and 5G Coverage Spur Mobile Commerce

Nationwide 5G now covers 78% of residents and pairs with near-universal internet access to create friction-free shopping journeys. Government fiber roll-outs and Fixed Wireless Access in remote areas shorten the urban-rural digital gap. Streaming-era

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consumers expect sub-second page loads; platforms respond with edge-hosting and progressive-web-app architectures that boost mobile checkout completion. 5G low-latency supports augmented-reality product trials and real-time order tracking, raising trust levels and basket sizes. Telco-retailer partnerships bundle zero-rated data plans with marketplace subscriptions, cementing smartphone primacy within the Saudi Arabia ecommerce market.

#### Mada Network Accelerates the Cash-to-Card Shift

The National Payment Network processed USD 52.6 billion in ecommerce sales during 2024, a 25.8% lift from 2023. Contactless Mada debit cards interoperate with Apple Pay and mada Pay, enabling PIN-free taps below SAR 100 and deterring COD usage. Merchant fees remain capped, incentivizing ubiquitous acceptance. Government wage digitalization funnels salaries directly into accounts, reinforcing card habits and raising the Saudi Arabia ecommerce market's electronic-payment penetration.

#### High Last-Mile Delivery Costs Limit Rural Reach

Sparse-population routes double per-package costs versus city drops, hurting service-level economics in the Saudi Arabia ecommerce market's hinterlands. Non-standardized addresses delay routing-algorithm efficacy. Consolidated pick-up points and drone pilot trials offset part of the gap, yet breakeven timelines stretch for independent couriers. Vision 2030 road upgrades and postcode roll-outs gradually narrow disparities but near-term drag persists.

Other drivers and restraints analyzed in the detailed report include:

Rapid Grocery-Delivery Adoption in Tier-2 CitiesSME Digitization Through Monsha'atCyber-Fraud and Compliance Complexity

For complete list of drivers and restraints, kindly check the Table Of Contents.

#### Segment Analysis

B2C dominated with 73.54% revenue in 2025 as pandemic-era habits normalized digital grocery, fashion and electronics shopping. Meanwhile, Monsha'at-backed onboarding propels B2B to a 13.45% CAGR, enlarging Saudi Arabia ecommerce market size for wholesalers and manufacturers.

B2B marketplaces integrate credit-scoring and invoice-financing modules, enabling bulk buyers to secure 30-day terms and stimulating order volumes. Zid's merchants process SAR 1.6 billion in annual sales, showcasing platform scalability. Compliance features such as PDPL-ready document vaults differentiate enterprise offerings, positioning B2B portals for sustained uptake among export-oriented SMEs.

Credit/ Debit Cards retained 42.62% share of Saudi Arabia ecommerce market size in 2025 owing to deep bank integration and fee ceilings. Yet mobile wallets post 14.71% CAGR, reflecting mobile-first behavior.

STC Pay's 8 million users leverage real-time peer-to-merchant transfers and QR codes at pop-up retail. Apple Pay and Google Pay surge among Gen-Z as biometric login heightens trust. SAMA's digital-banking sandbox streamlines licensing, prompting neobank entrants that bundle e-wallets with micro-savings and BNPL plugins, further diversifying payment rails.

The Saudi Arabia E-Commerce Market Report is Segmented by Business Model (B2B, and B2C), Product Category for B2C E-Commerce (Beauty and Personal Care, Consumer Electronics, and More), Payment Mode for B2C E-Commerce (Credit/Debit Cards, Mobile Wallets, and More), and Device Type for B2C E-Commerce (Smartphone, Desktop/Laptop, and More). The Market Forecasts are Provided in Terms of Value (USD).

## List of Companies Covered in this Report:

Amazon Inc. (Amazon.sa) Noon AD Holdings Ltd. Jarir Marketing Co. United Electronics Co. (eXtra) Nahdi Medical Co. STC Pay Co. Ounass (Al Tayer Insignia LLC) Sary Co. Lulu Group International Carrefour Saudi (Majid Al Futtaim) Nana Direct Co. Talabat (Delivery Hero SE) HungerStation (Delivery Hero SE) Haraj Co. Namshi Holding Limited Shein Group Ltd. eXtra Stores App (United Electronics Co.) CarrefourNow (Majid Al Futtaim) IKEA Saudi Arabia (Ghassan Ahmed Al Sulaiman Co.) Noon AD Holdings One Person Company

## Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

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