

Saudi Arabia Quick Service Restaurants - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 160 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

Saudi Arabia Quick Service Restaurants Market Analysis

The Saudi Arabia quick service restaurants market was valued at USD 10.35 billion in 2025 and estimated to grow from USD 11.01 billion in 2026 to reach USD 15.03 billion by 2031, at a CAGR of 6.42% during the forecast period (2026-2031). The Kingdom's youthful population, large-scale urban infrastructure projects, increasing digital engagement, and rapid expansion of delivery channels are driving this growth. Young adults and teenagers, who demand quick and convenient dining options, are also enthusiastic users of mobile ordering and delivery apps. Urban areas like Riyadh and Jeddah are experiencing a rise in QSRs, supported by the growth of cloud kitchens and an expanding food delivery network. To meet the rising demand for healthier and sustainable choices, QSRs are updating their menus and adopting eco-friendly practices. The competitive landscape remains intense, with local players defending their market share against global brands that are customizing their offerings to align with halal standards and local flavor preferences. While price sensitivity among consumers is increasing, niche markets focusing on health-conscious options and late-night dining are gaining traction. These niches are further supported by Vision 2030 investments, which continue to channel funds into mixed-use districts. In 2024, franchise activity saw significant growth, enabling both independent operators and global chains to expand their geographic presence. These players are also leveraging technology to improve inventory management, labor scheduling, and AI-driven menu pricing.

Saudi Arabia Quick Service Restaurants Market Trends and Insights

Expansion and modernization of urban infrastructure

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Saudi Arabia's Vision 2030 serves as a driving force for the rapid growth of Quick Service Restaurants (QSRs) across the kingdom. Mega-projects such as NEOM, the Red Sea Project, and the Qiddiya entertainment city are creating significant opportunities. A notable example is the Jeddah Food Cluster, which was inaugurated in November 2024. With an investment of SAR 20 billion, this expansive 11 million square meter park is now the world's largest food park. Urban development projects have increased restaurant density in Riyadh, while new commercial districts emphasize mixed-use developments that enhance food service accessibility. The construction of modern malls, metro-connected food courts, and recreational hubs is establishing new commercial zones, providing thriving opportunities for QSR operators. Brands specializing in fast-casual and on-the-go dining formats are particularly benefiting. The Public Investment Fund, through its Tourism Investment Enabler Program, is allocated SAR 42 billion to hospitality infrastructure in 2024, ensuring sustained demand for QSRs in high-traffic areas. Improvements in the transportation network, including the Riyadh Metro and expanded highways, are reducing delivery times and expanding serviceable market areas for QSR operators. Additionally, regulatory frameworks from the Saudi Food and Drug Authority ensure that infrastructure investments comply with food safety standards, supporting long-term market stability.

Large Gen-z cohort seeking western flavors

In Saudi Arabia, a substantial Gen-Z demographic is propelling the QSR market, actively seeking Western flavors. These young consumers prioritize global fast food experiences, digital engagement, and a wide variety of food options. As of 2024, the World Bank reports that 24% of Saudi Arabia's population is under 14 years old. This youthful segment drives consistent demand for international cuisine that aligns with global food trends. Notably, this group dedicates a higher share of their disposable income to dining out. Western QSR formats have gained momentum due to Vision 2030's cultural openness initiatives, which have eased entertainment restrictions and encouraged diverse culinary offerings in public spaces. Additionally, platforms like Instagram and TikTok significantly amplify Western food trends, fueling viral marketing campaigns that increase brand visibility among younger audiences. Improved international connectivity and relaxed visa policies have expanded travel opportunities for this demographic, fostering familiarity with global QSR brands and raising expectations for authentic flavor profiles. Moreover, educational and cultural exchange programs enhance their appreciation for diverse culinary experiences, supporting the sustained growth of international QSR concepts in the region.

Fast-growing healthy-eating movement cannibalising fried QSR

Health consciousness among Saudi consumers is on the rise, driven by government-led wellness initiatives under Vision 2030. These initiatives prioritize increasing awareness about healthy dietary habits and encouraging the adoption of active lifestyles. As part of the Ministry of Health's National Transformation Program, efforts to reduce obesity include public health campaigns that specifically address fast food consumption patterns. These campaigns create significant challenges for traditional fried quick-service restaurant (QSR) formats, which are heavily reliant on such consumption trends. In contrast, plant-based restaurant concepts, such as Nabati Eatery and Healthy and Co, have rapidly expanded their presence across major cities. These establishments are capturing market share from conventional QSR operators by focusing on innovative menu offerings and health-oriented marketing strategies. To remain competitive, traditional QSR operators are diversifying their menus by introducing grilled options, salads, and reduced-sodium alternatives. However, implementing these changes requires substantial modifications to their supply chains and investments in staff training to ensure successful execution. The acceleration of this health-conscious trend during the post-pandemic recovery period highlights a sustained shift in consumer behavior. This shift poses a significant challenge to the growth prospects of conventional fried food categories, as consumers increasingly prioritize healthier dining options.

Other drivers and restraints analyzed in the detailed report include:

Ai-driven dynamic menu pricing increasing ticket sizes
Shift towards pickup over dine-in
Pressure from multinational and domestic

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

chains on smaller operators

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

Segment Analysis

Meat-based cuisines hold a 27.08% market share in 2025, highlighting a strong cultural preference for halal proteins and traditional flavors among local consumers. This segment's leadership is supported by robust supply chains for halal-certified ingredients and the expertise of local operators skilled in regional cooking techniques and spice preferences. Meanwhile, the ice cream segment is experiencing rapid growth, with a projected 9.78% CAGR through 2031. This growth is driven by consistent demand in Saudi Arabia's hot climate and an increasing willingness among consumers to spend on premium dessert experiences, supported by rising disposable incomes.

Global brands like McDonald's and Domino's have secured significant market shares in the burger and pizza segments by adapting their menus to incorporate local ingredients while maintaining global brand consistency. The bakery segment benefits from traditional breakfast habits and a rising demand for grab-and-go options, particularly among urban professionals. These quick-service formats align with the commuting patterns in urban areas. Other quick-service restaurant (QSR) cuisines, such as Asian and Mediterranean options, are expanding due to demographic diversification and growing cultural acceptance. However, growth in these segments is limited by challenges in ingredient sourcing and consumer familiarity. The Saudi Food and Drug Authority's halal certification requirements ensure compliance with religious dietary laws across all cuisine segments. This creates operational standardization and enhances market stability across the diverse food categories.

Independent outlets hold a 51.53% market share in 2025, highlighting their ability to resist the expansion of international chains. Their success is driven by strong local market knowledge, adaptable pricing strategies, and community-focused customer loyalty. These operators benefit from lower overhead costs, quicker decision-making, and the flexibility to tailor offerings to neighborhood preferences and cultural nuances, advantages that larger chains often struggle to replicate. On the other hand, chained outlets are experiencing a 9.02% CAGR through 2031, supported by standardized operations, strong brand recognition, and access to capital for expansion and technological upgrades. The growing appeal of the franchise model is evident, with 160 new agreements signed at the 2024 Franchise Expo, offering independent operators opportunities to affiliate with brands while maintaining control over their operations.

Independent operators strategically focus on residential neighborhoods and secondary markets, where commercial rents are more affordable. In contrast, chained outlets prioritize high-traffic commercial areas and shopping centers. Technology adoption varies significantly between the two: chained operators implement advanced digital ordering and payment systems, while independent outlets rely on basic point-of-sale solutions and cash transactions. Supply chain dynamics also create distinctions, with chained outlets benefiting from bulk purchasing power and standardized ingredient specifications, while independent operators maintain flexibility in sourcing and menu customization. Furthermore, the Ministry of Commerce supports independent operators with financing and regulatory guidance, enabling them to compete effectively against larger chains.

The Saudi Arabia Quick Service Restaurants Market Report is Segmented by Cuisine (Bakeries, Burger, Ice Cream, Meat-Based Cuisines, Pizza, Other QSR Cuisines), Outlet (Chained Outlets, Independent Outlets), Locations (Leisure, Lodging, Retail, Standalone, Travel), Service Type (Dine-In, Takeaway, Delivery), and Geography (Regional Analysis). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Al Baik Food Systems Company McDonald's Corporation Yum! Brands Restaurant Brands International Subway (Shamel Food Co.)

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Domino's Pizza, Inc. Herfy Food Service Company Americana Group Papa John's International Doctor's Associates Inc. Dunkin' Brands Kahala Brands International Dairy Queen, Inc. Restaurant Brands International Papa Murphy's Holdings Little Caesars Focus Brands PizzaExpress Highlands Coffee JSC

Additional Benefits:

 The market estimate (ME) sheet in Excel format
3 months of analyst support

Table of Contents:

1 INTRODUCTION

- 1.1 Study Assumptions and Market Definition
- 1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 KEY INDUSTRY TRENDS

- 4.1 Number of Outlets
- 4.2 Average Order Value
- 4.3 Regulatory Framework

5 MARKET LANDSCAPE

- 5.1 Market Overview
- 5.2 Market Drivers
 - 5.2.1 Expansion and modernization of urban infrastructure
 - 5.2.2 Shift towards pickup over dine-in
 - 5.2.3 Youthful demographics and tech-savvy consumers
 - 5.2.4 Large Gen-Z cohort seeking Western flavors
 - 5.2.5 AI-driven dynamic menu pricing increasing ticket sizes
 - 5.2.6 24-hour mall economy boosting late-night QSR demand
- 5.3 Market Restraints
 - 5.3.1 Fast-growing healthy-eating movement cannibalising fried QSR
 - 5.3.2 Pressure from multinational and domestic chains on smaller operators
 - 5.3.3 Maintaining consistent food quality
 - 5.3.4 Frequent policy/tax changes on food and beverage products
- 5.4 Regulatory Outlook
- 5.5 Porter's Five Forces
 - 5.5.1 Threat of New Entrants
 - 5.5.2 Bargaining Power of Buyers/Consumers
 - 5.5.3 Bargaining Power of Suppliers
 - 5.5.4 Threat of Substitute Products
 - 5.5.5 Intensity of Competitive Rivalry

6 MARKET SIZE AND GROWTH FORECASTS (VALUE)

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 6.1 By Cuisine
 - 6.1.1 Bakeries
 - 6.1.2 Burger
 - 6.1.3 Ice Cream
 - 6.1.4 Meat-based Cuisines
 - 6.1.5 Pizza
 - 6.1.6 Other QSR Cuisines
- 6.2 By Outlet
 - 6.2.1 Chained Outlets
 - 6.2.2 Independent Outlets
- 6.3 By Locations
 - 6.3.1 Leisure
 - 6.3.2 Lodging
 - 6.3.3 Retail
 - 6.3.4 Sandalone
 - 6.3.5 Travel
- 6.4 By Service Type
 - 6.4.1 Dine-in
 - 6.4.2 Takeaway
 - 6.4.3 Delivery

7 COMPETITIVE LANDSCAPE

- 7.1 Market Concentration
- 7.2 Strategic Moves
- 7.3 Market Ranking Analysis
- 7.4 Company Profiles (includes Global-level Overview, Market-level Overview, Core Segments, Financials (if available), Strategic Information, Market Rank/Share, Products and Services, Recent Developments)
 - 7.4.1 Al Baik Food Systems Company
 - 7.4.2 McDonald's Corporation
 - 7.4.3 Yum! Brands
 - 7.4.4 Restaurant Brands International
 - 7.4.5 Subway (Shamel Food Co.)
 - 7.4.6 Domino's Pizza, Inc.
 - 7.4.7 Herfy Food Service Company
 - 7.4.8 Americana Group
 - 7.4.9 Papa John's International
 - 7.4.10 Doctor's Associates Inc.
 - 7.4.11 Dunkin' Brands
 - 7.4.12 Kahala Brands
 - 7.4.13 International Dairy Queen, Inc.
 - 7.4.14 Restaurant Brands International
 - 7.4.15 Papa Murphy's Holdings
 - 7.4.16 Little Caesars
 - 7.4.17 Focus Brands
 - 7.4.18 PizzaExpress
 - 7.4.19 Highlands Coffee JSC

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Saudi Arabia Quick Service Restaurants - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 160 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-01"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com