



The Modern Saudi Arabian Foodservice Consumer

Future Hospitality Summit - May 2022

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We track out of home eating every year – Food Panel



Market & segment sizes, shares, consumer behavior and menu trends

 Current  Upcoming

60,000+

Consumers

10 Million

Quarter a Year

All

Sectors

3

Current Markets, 3 New

3

Quarters

25+

Subscribers



We track Restaurants every week – SalesTrack®

MINGORA

Weekly Restaurant Sales, Tx and Ticket based on actual chain data

In Partnership with 

1,500+ Restaurants Weekly

52 Weeks a Year

Select Market Segments

2 Markets - UAE & KSA

Special Deep Dives

35+ Subscribers



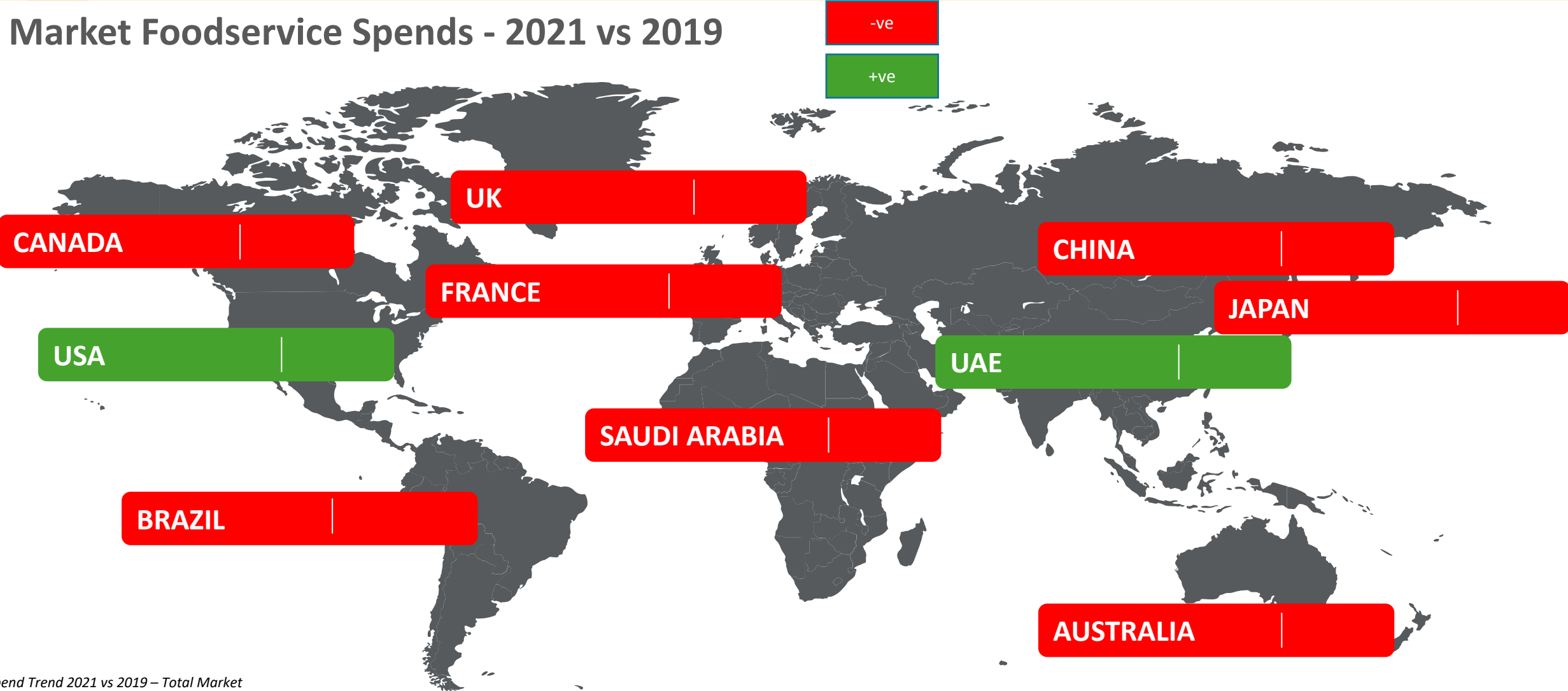
A light gray world map serves as the background. Two semi-transparent circles are overlaid on the map: a green circle over North America and an orange circle over Mexico and Central America. The text 'Global Trends' is centered over the green circle.

Global Trends

Why Saudi Arabia Matters

Saudi Arabia places near global average

Market Foodservice Spends - 2021 vs 2019



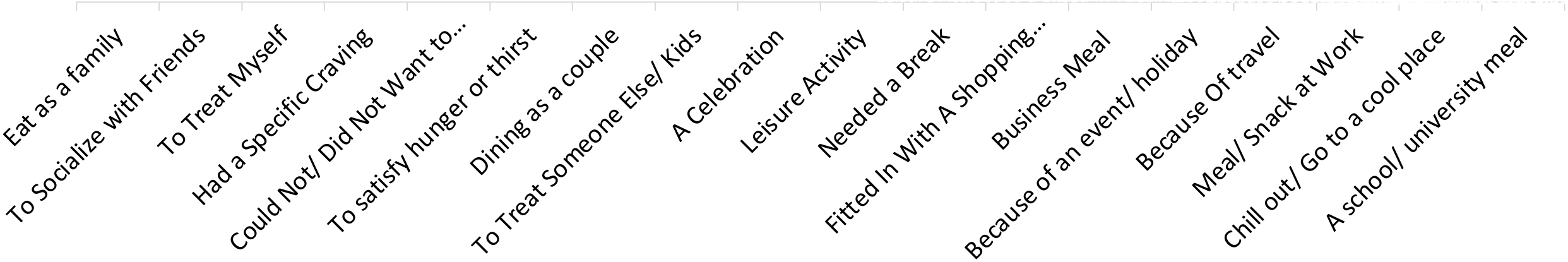
Spend Trend 2021 vs 2019 – Total Market

• Sources: Mingora’s Food Panel, The NPD CREST® and SalesTrack®

A Culture Built on Social Connections



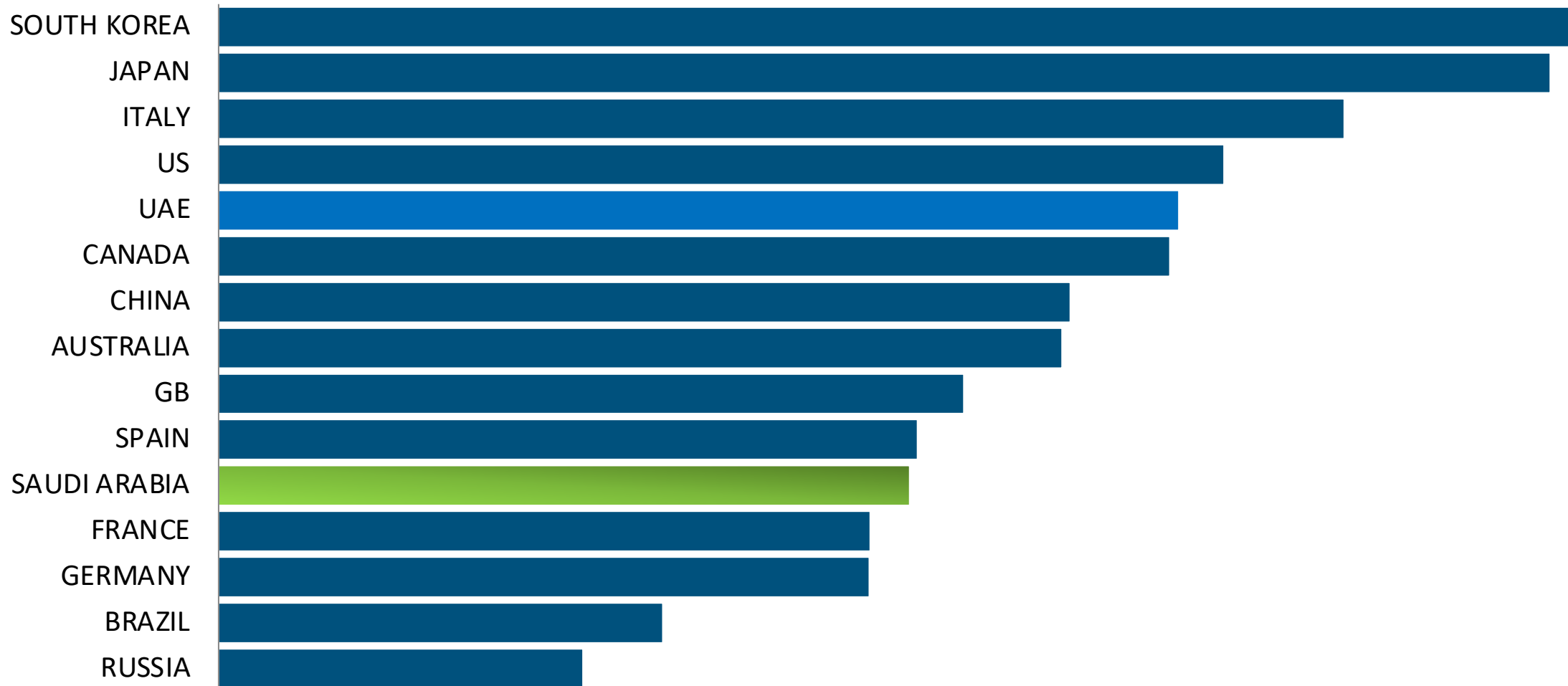
Visits distribution by motivations



Source: Mingora’s Food Panel KSA Q1, 2022

A Developed Market

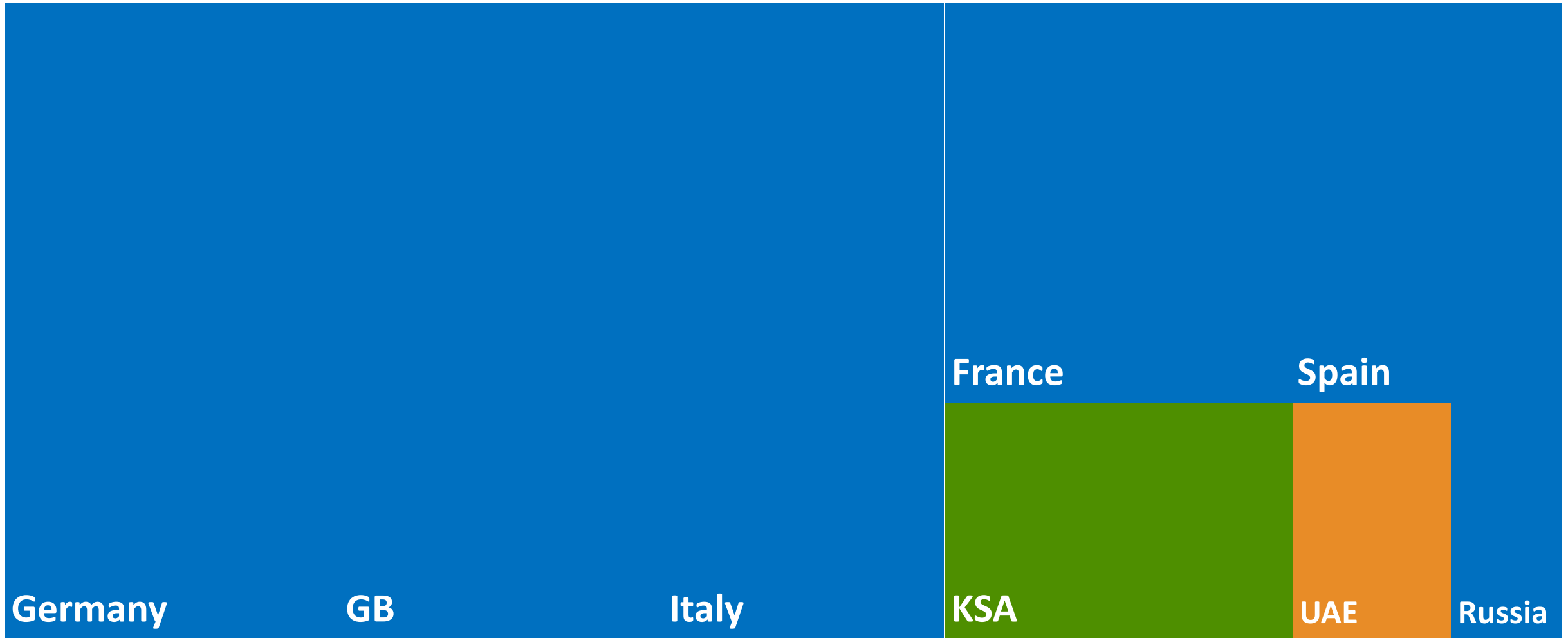
Per capita visits to foodservice by market 2019



• Sources: Mingora's Food Panel, The NPD CREST®

A Sizeable Market

Foodservice Market Size 2021 (In Billions Euros)



- Sources: Mingora's Food Panel, The NPD CREST®

An Entrepreneurial Market

Top restaurant chains by origin

Saudi

American

Others

Top 25 Saudi Brands by Spends SAR

McDonald`s

Al Baik

KFC

Herfy

Starbucks

Kudu

Dunkin`
Donuts

Baskin
Robbins

Burger King

Domino`s
Pizza

Shawarma
House

Al Tazaj

Subway

Hardees

Dr. Cafe

Maestro
Pizza

Saadelddin
Pastry

Tim
Hortons

Shawarmer

Shawaya
House

Steakhouse

Krispy
Kreme

Burgerizzr

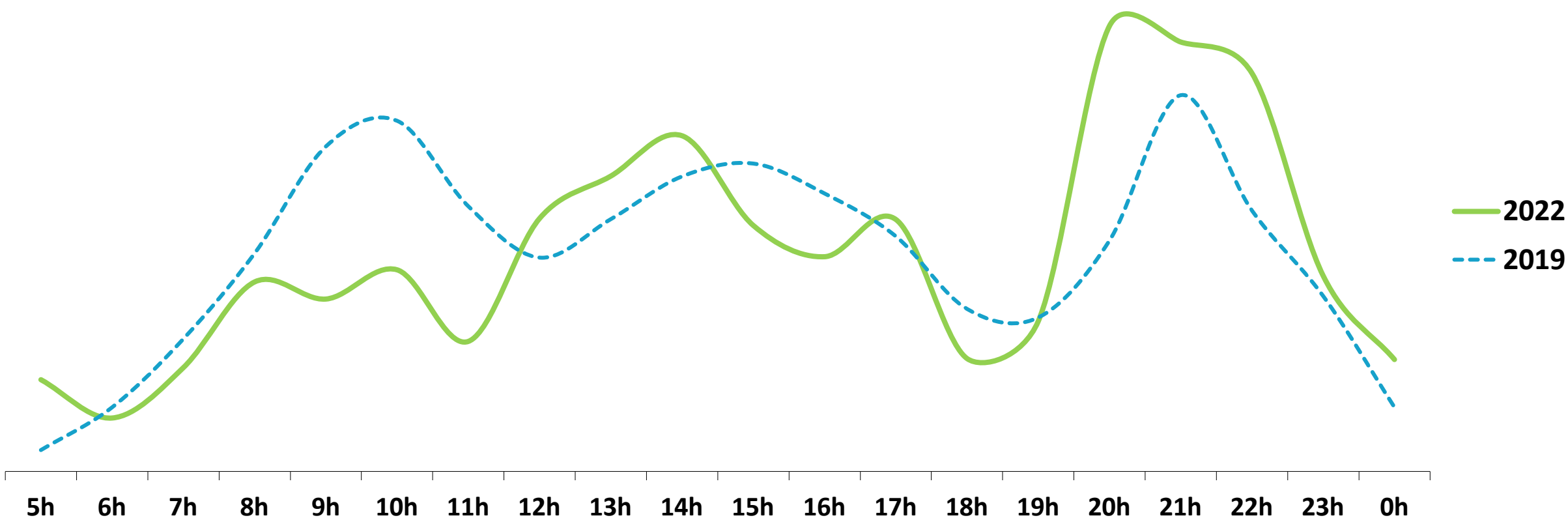
Amo Hamza

Al
Romansiah

Source: Mingora's Food Panel KSA Q1, 2022

An All-Dayparts Market

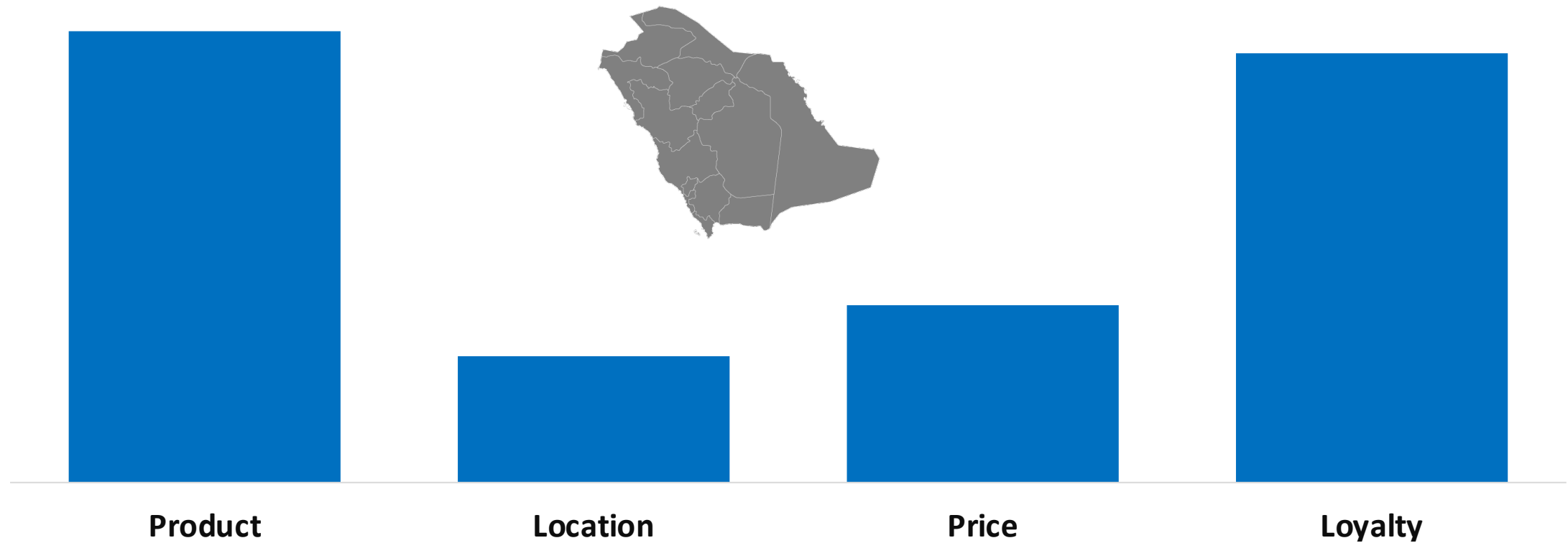
Lunch and Dinner recovery done, time to build back breakfast/evening



Source: Mingora's Food Panel KSA Q1, 2022

Product and Loyalty Seeking Consumer

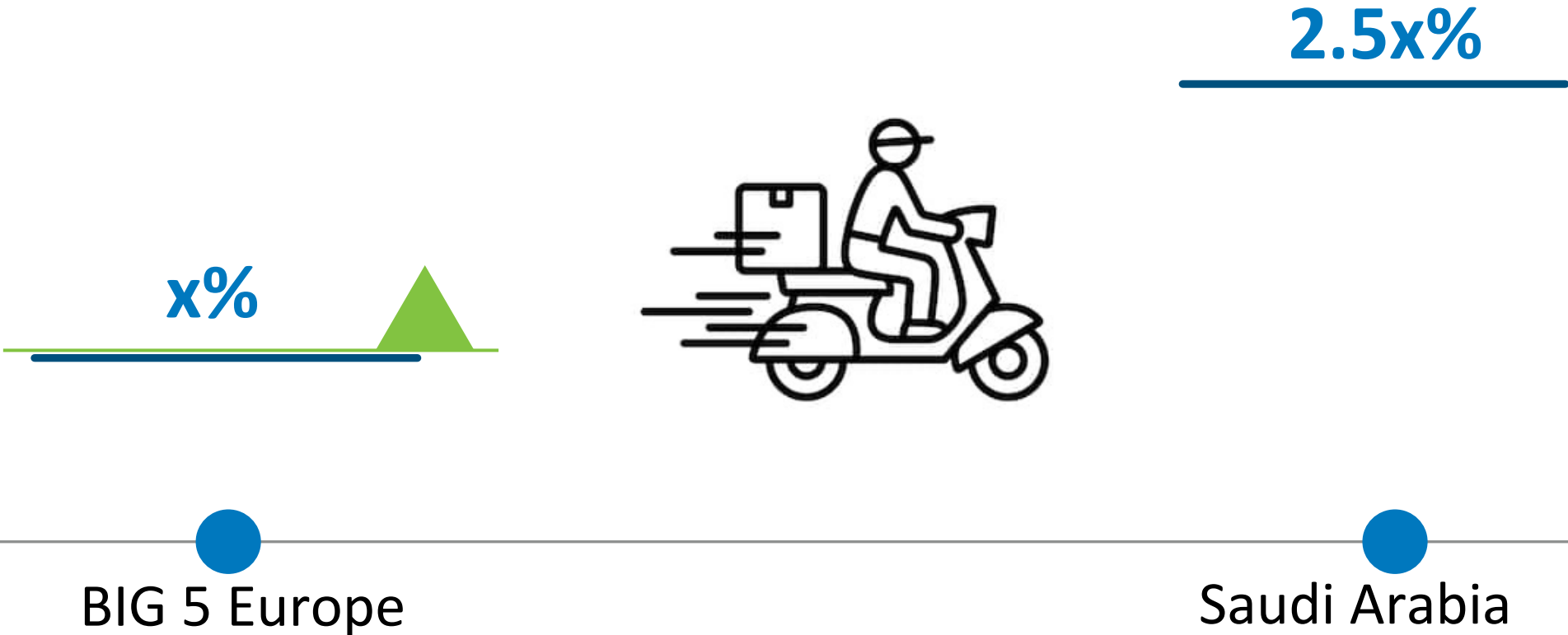
Reason for choice of a Place/Chain in %age of Occasions



Source: Mingora's Food Panel KSA Q1, 2022, NPD CREST

A 2.5X Developed Delivery Infrastructure

%age of all occasions Delivered



Source: Mingora's Food Panel KSA Q1, 2022, NPD CREST

Structure of Restaurant Occasions by Store Type %

■ Fast Food %age of Spends

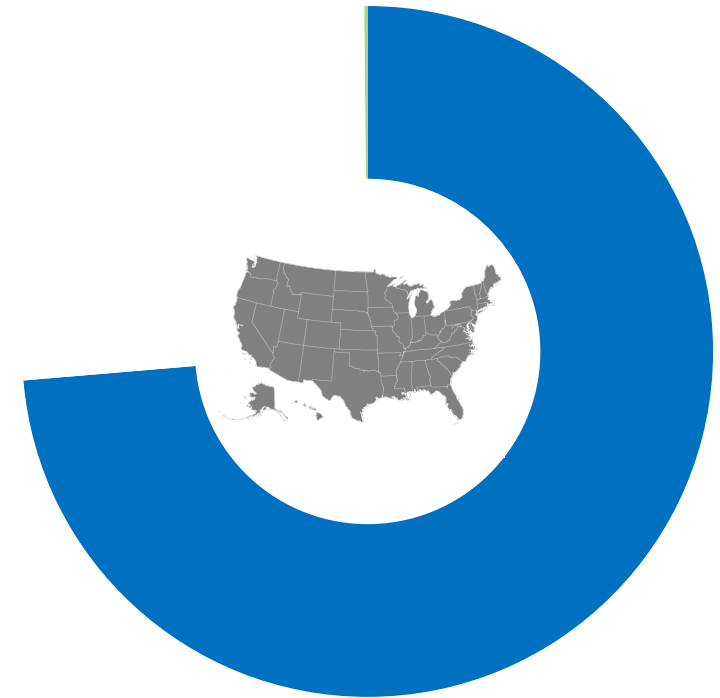
Saudi Arabia



Europe



US



Source: Mingora's Food Panel KSA Q1, 2022

Yet A Positive Forecast on Total System

Total Foodservice Spends 2022 vs 2021 – Saudi Arabia

+8%

SPENDS



+4%

VISITS



+4%

CHECK



- Source: The Food Panel KSA Q1, 2022 vs 2021

Reach out

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