Voice of the Consumer 2025: **Saudi Arabia findings**

01

Executive summary

In 2025, consumers in Saudi Arabia are navigating an increasingly complex food landscape. They are redefining how they eat, shop and make food-related decisions – balancing cost, convenience, health and cultural identity. In a fast-changing economy, shoppers are adapting by seeking value and making smarter choices, while convenience has become an essential part of daily life, especially among younger, tech-savvy consumers.

PwC's Middle East's Voice of the Consumer survey of over 1,000 consumers in Saudi Arabia uncovers these shifting behaviours influenced by cost pressures, health anxieties, sustainability ideals and digital adoption. Food is also no longer just functional, it's an expression of culture, curiosity and lifestyle. As health awareness rises, there's growing interest in fresh produce, locally made goods and plant-based alternatives. At the same time, consumers are embracing digital tools and technologies to support their well-being, from wearables to AI-powered platforms.

The food scene in Saudi Arabia is not without contradictions. While many seek value and discount retailers, a large proportion still dines out or orders takeaway regularly. Climate change is a widely acknowledged threat to the Kingdom. Yet when it comes to food choices, it still ranks below cost and health as a consumer concern.

For food brands and retailers, this moment presents a unique opportunity: To meet evolving consumer needs with culturally relevant, tech-enabled and health-conscious solutions – delivering value without compromise.

Key findings:

47%

Of respondents in the Kingdom ranked cost of living among the top three threats likely to impact the country in the next 12 months

47%

Of our respondents in Saudi Arabia eat out at least once a week, significantly higher than 29% globally

75%

Of survey respondents in the Kingdom (compared to 46% globally) described their health as excellent or very good

66%

Of consumers in Saudi Arabia are worried about climate change, significantly less than 82% of respondents globally

11%

Of consumers we surveyed in Saudi Arabia (compared to 9% regionally and 5% globally) are currently taking weight-loss prescription drugs and 42% said they would be open to using them in future

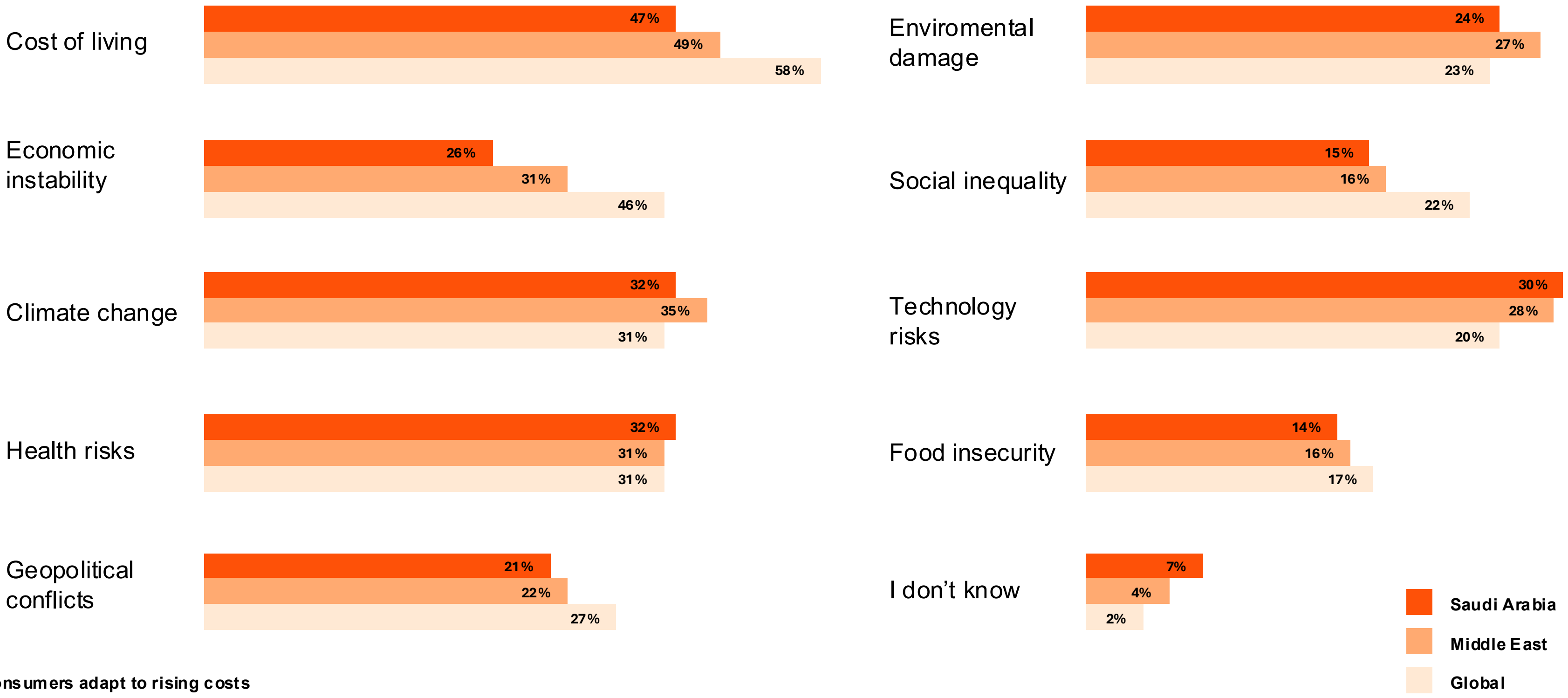
02

Consumers adapt to rising costs

The cost of living is a concern for the consumer in Saudi Arabia. Inflation in the Kingdom rose to **2.3% in March**, driven by a gradual rise in housing rents, food and personal goods.

According to our survey findings, **nearly half (47%)** of our respondents in the Kingdom ranked cost of living to be among the top three threats likely to impact the country in the next 12 months – aligned with their regional peers – ahead of health risks and climate change, **each at 32%.** While concerns around the cost of living were lower than the global average of 58%, pricing plays a critical role in everyday decisions. When selecting food items to buy, **price was the top consideration for 47% of respondents, followed by taste (34%) and brand trust (35%)**.

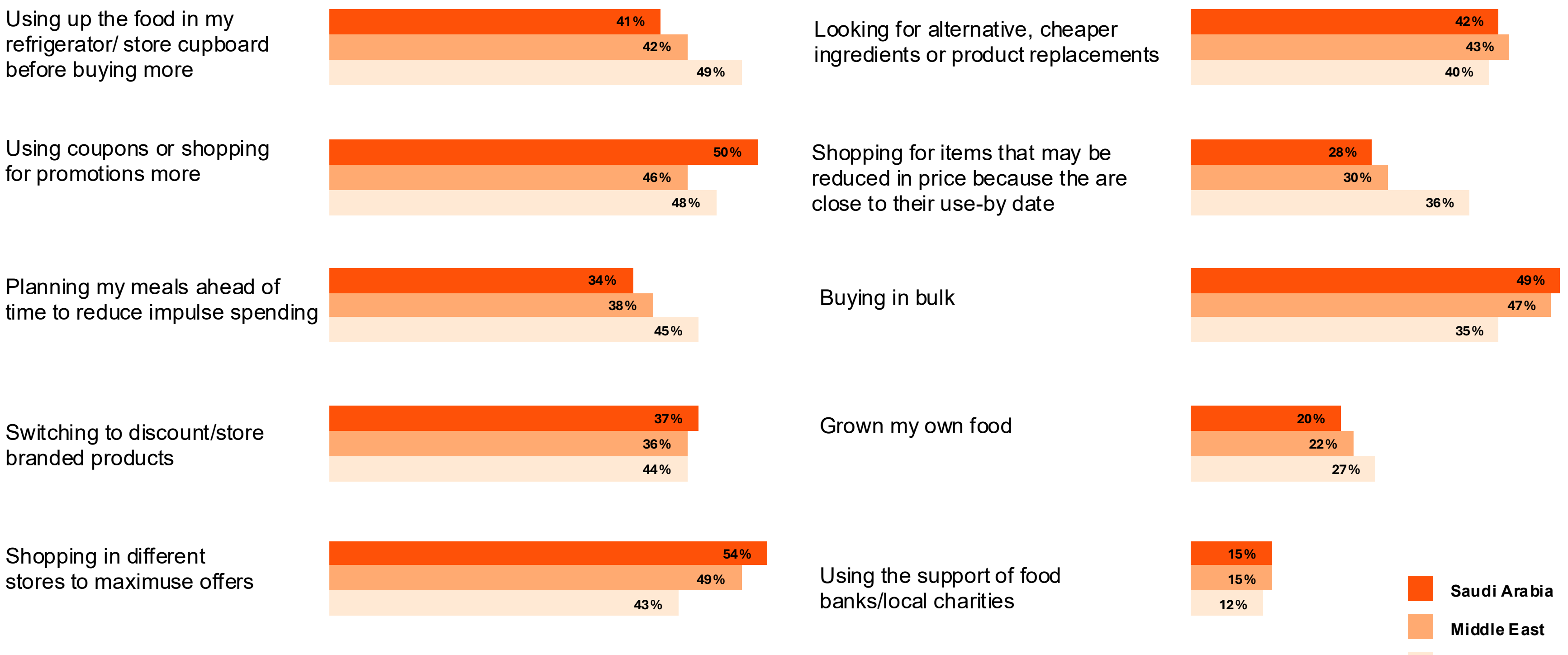
Q: Which of the following potential threats/risks do you feel could have the greatest impact on your country in the next 12 months?



Food inflation is also reshaping shopping behaviour. Consumers are adapting by switching brands, taking advantage of promotions and shopping across multiple stores to manage costs. Our survey respondents highlighted three main reasons they would switch brands: **better value (40%), better taste (47%), and greater health benefits (32%).**

When asked about actions taken to offset rising food costs, **more than half (54%)** reported shopping at different stores, half used coupons or special offers and a **similar proportion (49%)** bought in bulk to manage costs.

Q: You've noted that you're concerned about the cost of food. What actions, if any, are you taking to reduce or offset the effects of food cost?



03

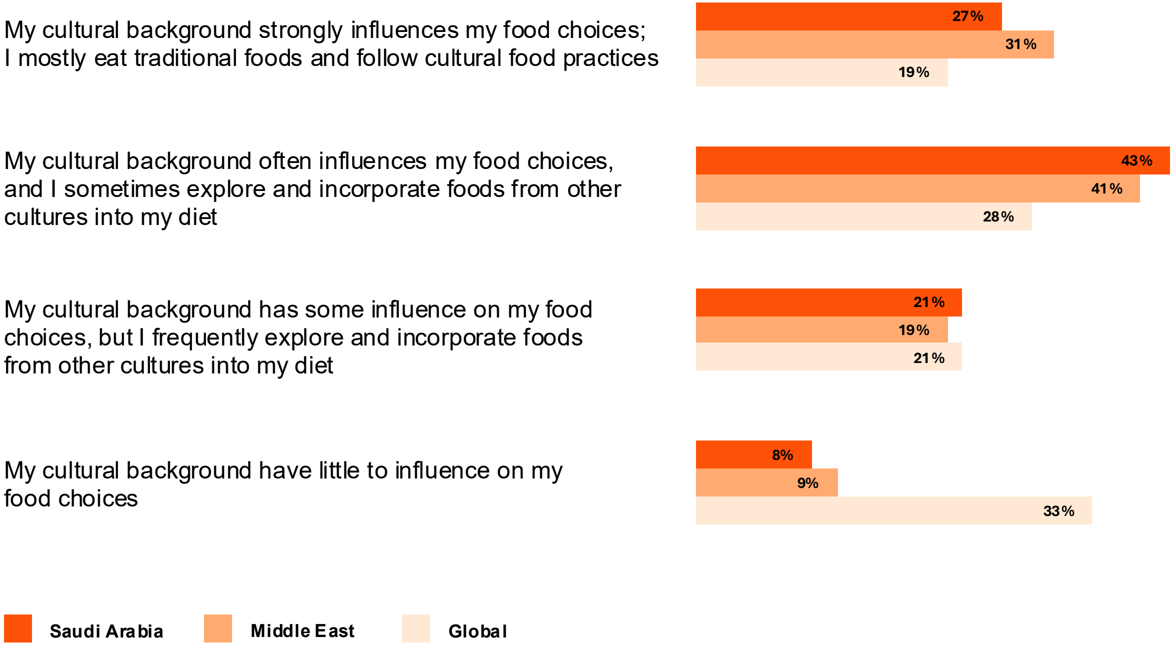
Convenience is a way of life

For Saudi Arabia's young, tech-savvy population, convenience has become a way of life, enabled by seamless, on-the-go experiences through digital platforms, convenience stores and food delivery services. Like their peers across the region, 48% of our respondents in the Kingdom use on-demand grocery delivery platforms, significantly higher than 28% globally. Around one third also preferred meal-kit delivery services, compared to just 15% globally.

Despite being price conscious, 47% of our respondents in the Kingdom, like their regional counterparts, eat out at least once a week, significantly higher than 29% globally; 53% order takeaways compared to only 34% globally and a similar proportion (55%) buy prepared food compared to 38% of their global peers. This highlights a clear preference for ease and efficiency, even as cost remains a key consideration.

This trend may be rooted in a cultural view of food as more than just nourishment – it is more social, experiential and expressive. While 27% of respondents in the country said their diet is shaped primarily by cultural traditions, 44% are open to global cuisines. Nearly half enjoyed trying new foods, compared to just 31% globally. This cultural openness reflects a growing shift toward more lifestyle-driven eating preferences in the Kingdom.

Q: How, if at all, do your cultural background and traditions influence the types of foods you choose to eat?



04

Health-conscious consumers prefer locally produced products

When asked to rate their general health, 75% of survey respondents in the Kingdom (compared to 46% globally) described it as excellent or very good, similar to their regional counterparts.

However, this positive self-assessment exists at a time of national health challenges: nearly half (45.1%) of the population aged 15 and older are considered overweight and more than one-in-five (23.1%) as obese.

Nearly 40% of our respondents indicated they exercised regularly, on par with their regional and global peers, 36% took supplements to primarily support their health and 15% preferring a vegetarian or a vegan diet to a great extent.
Our findings suggest that consumers in the Kingdom are increasingly favouring fresh produce, with 66% of consumers planning to increase their consumption of fresh produce in the next six months, aligned with the rest of the region, but higher than 56% globally. And over 60% of the consumers are very to extremely concerned about the risks of ultra-processed consumables and use of pesticides in food.

Health-conscious choices are also influencing purchasing behaviours. More than a third (34%) buy locally produced products – and the top three drivers for this were higher quality (51%), contribution to the local economy (43%) and health (41%).

But barriers remain

Despite a visible preference to local produce, consumers pointed to top three barriers. Around 44% said there was limited variety in locally produced goods, 39% indicated lack of accessibility and 38% said they were more expensive than others.

In fact, more than half (56%) of consumers in Saudi Arabia say they would choose a cheaper imported item over a more expensive local one when presented with similar products. To compete, local producers must combine freshness and quality with scale and smart pricing models.

05

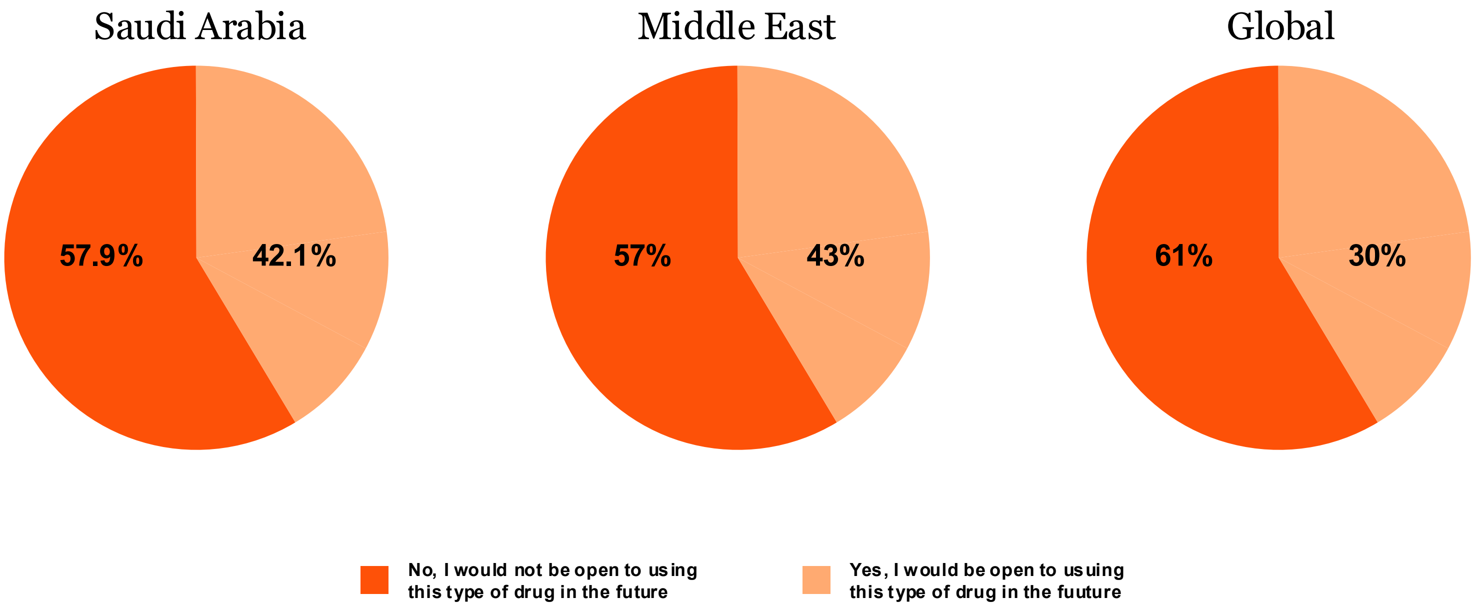
A tech-forward approach to health

40%

of consumers in Saudi Arabia – consistent with regional trends – use at least one healthcare app or wearable device for exercise guidance, activity tracking, dieting, weight loss or healthy eating, compared to just over 30% globally.

Wearable technology and apps have led to a change in daily habits for 50% of consumers in Saudi Arabia, with a significant change experienced by 43% of consumers in Saudi Arabia compared to 34% globally. There's also a clear willingness to embrace new methods – 11% of consumers in Saudi Arabia are currently taking weight-loss prescription drugs such as Ozempic or Mounjaro, higher than 9% of their regional peers and 5% globally. Of those who don't, 42% said they would be open to using these in future, once again higher than their peers in the region and globally.

Q: Would you be open to using a weight-loss prescription drug in the future?



01

Around 80% of respondents from Saudi Arabia who are currently taking weight-loss prescription drugs report exercising more often, making healthier food choices and experiencing improved health outcomes as a result. However, some noted less-positive experiences including side effects (66%), unmet expectations (46%) and loss of muscle mass (44%).

02

It's worth noting that research indicates that Saudi Arabia's weight loss market is projected to reach **US$2.7bn by 2033.**

03

Generative AI (GenAI) is also gaining traction as a health and fitness aid.

48% are comfortable using GenAI for meal planning and more than half for personalised fitness programmes – higher than both global peers.

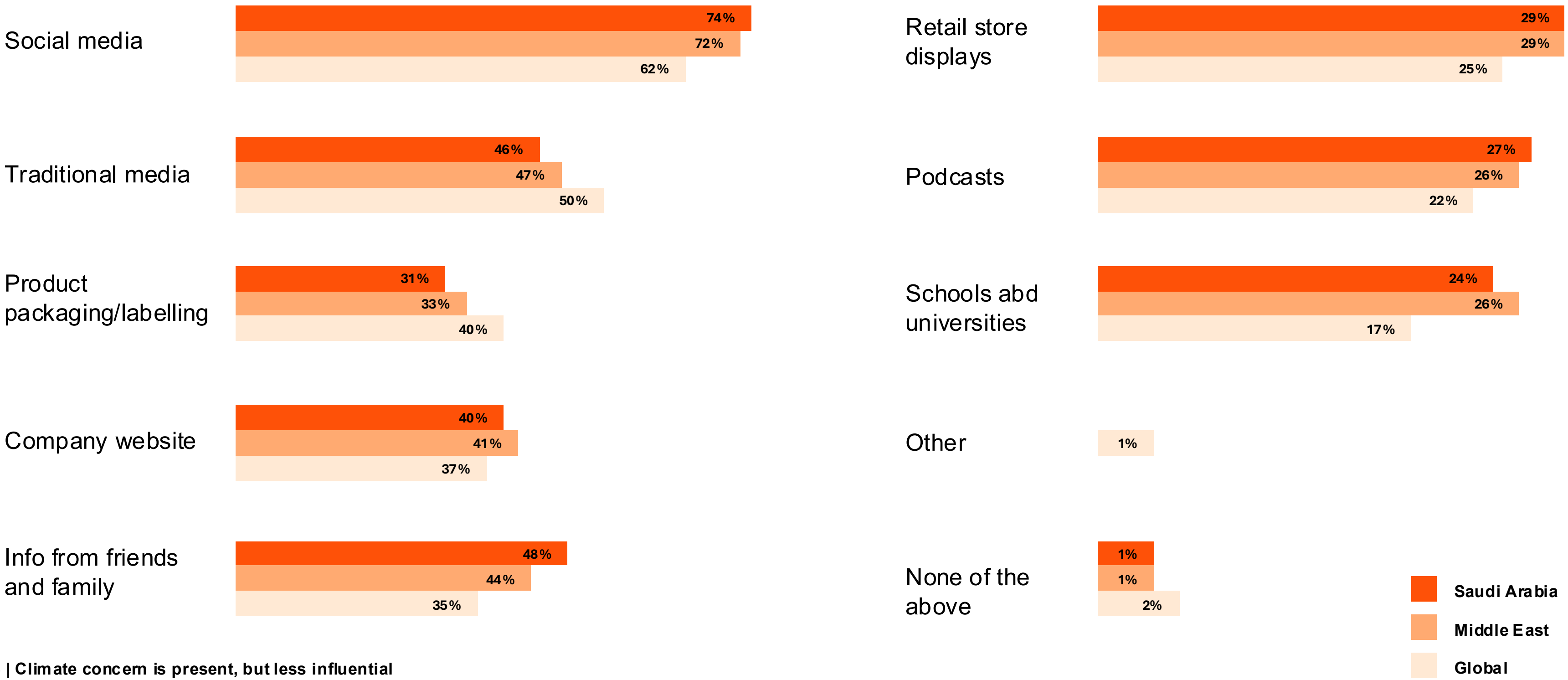
06

Climate concern is present, but less influential

While 32% of Saudi respondents cited climate change as one the top three threat to their country, it's seemingly not a big influencing factor. Only 66% of consumers in Saudi Arabia are worried, significantly less than 81% of respondents globally.

Despite this, there is some climate-aligned behaviour. Like their peers in the region, **around 40% say they avoid buying environmentally harmful foods**, but over half do not regularly research brands' sustainability efforts. **Notably, 74% said they rely on social media for information about corporate climate action,** highlighting the growing influence of digital platforms in shaping perceptions and choices.

Q: What sources do you typically learn information about a company's climate and sustainability initiatives from?



When it comes to paying more for food to support environmental health, 38% of consumers in Saudi Arabia said they would be willing to do so (vs. 45% globally), while 17% said they would not (vs. 12% globally).

The remaining 45% remain undecided – representing a pivotal audience for effective sustainability messaging, trust-building and behaviour change campaigns.

07

Strategic priorities for food retailers and brands

01

Saudi Arabia's consumers are pragmatic, digitally empowered and increasingly health conscious. Businesses looking to win in this market can leverage these opportunities.

Elevate Saudi flavours with culinary innovation

With cultural pride in local cuisine and locally produced food, there lies an opportunity for food brands in Saudi Arabia to fuse authenticity with innovation. By blending Saudi flavours with global culinary trends, food companies can create products that resonate with a young, curious consumer base, support national food security goals and position Saudi cuisine as a distinctive, exportable experience.

Digital scaling of premium offerings

As consumer demand for convenience grows, food aggregators and e-commerce platforms have the opportunity to scale premium offerings through digital experiences. By investing in tech-enabled distribution, rapid delivery models and curated online storefronts, brands can align with modern lifestyles. There is also the opportunity to embed AI-powered shopping assistants in e-commerce grocery-delivery platforms. These offer healthier swaps, climate-friendly alternatives, or bundle-based savings suggestions in real-time based on household size, budget, or health goal profiles.

Capture the plant-based momentum

As consumers in the Kingdom become inclined towards vegetarian and vegan diets, there is an opportunity for food industry companies to lead in health, sustainability and economic diversification. As consumers embrace gree`ner lifestyles, brands can tap into this momentum by developing innovative, locally sourced plant-based products that cater to shifting tastes and values. This aligns with Vision 2030 goals by supporting local agriculture, reducing environmental impact and advancing food security.

02

Saudi Arabia's consumers are pragmatic, digitally empowered and increasingly health conscious. Businesses looking to win in this market can leverage these opportunities.

AI to reduce food waste and boost nutrition

Companies in the food industry can leverage AI to reduce food waste, improve nutrition and cut emissions. This will help meet the growing demand for efficient and environmentally friendly food solutions. Embracing AI can lead to the development of nutrient-rich, long-lasting food products, thereby opening new markets and contributing to the Kingdom's food security objectives. There's also an opportunity to develop GenAI-powered platforms to suggest meals based on real-time inputs like mood, health goals, fridge inventory and dietary preferences.

Target GLP-1 users with nutrient-rich products

Tap into GLP-1 and weight loss drug users. With 11% of survey respondents from Saudi Arabia using GLP-1 drugs and 42% open to it, there is an opportunity to develop small, nutrient-rich products that pair well with these drugs. Introduce snack-sized packages and 'light meal' ranges for this growing market segment.

Being sustainable without price rise.

While sustainability is gaining awareness, consumers in Saudi Arabia continue to prioritise price when choosing food brands. This presents an opportunity for companies to integrate sustainability into their offerings – but without compromising on cost or perceived value. Brands that subtly embed eco-conscious practices (like low-impact packaging or cleaner ingredients) while keeping products affordable and health-forward can win consumer trust. The key lies in aligning sustainability with existing priorities, making it a value-add, not a trade-off, for today's price-sensitive yet quality-driven shoppers.

"Consumers in Saudi Arabia are reshaping the food landscape with confidence and curiosity – embracing wellness, digital innovation and local identity while navigating the realities of cost. This is an era of empowered choices. For brands that listen closely, the opportunity to deliver meaningful, tech-enabled and culturally relevant value has never been greater."

Imad Matar, Partner, Transaction Services Leader, PwC Middle East

Let’s talk

Norma Taki

Deals Partner and Consumer Markets Leader, PwC Middle East

Imad Matar

Partner, Transaction Services Leader, PwC Middle East