Voice of the Consumer 2025: Middle East findings

What we eat, how we live - food and health choices defining the regional consumer

Table of contents

Executive summary

In 2025, the way we eat is becoming a mirror of broader personal, societal and environmental values. Our latest survey, Voice of the Consumer 2025: Middle East findings, uncovers a deep and complex transformation in consumer food habits - revealing a new era of heightened “concern” around rising food costs, food waste, health, ethics and sustainability.

In the Middle East region, much like many other parts of the world, shoppers are also feeling the economic pressure and responding pragmatically - trading down to discount brands, purchasing in bulk, and seeking greater value through promotions. Concerns over the environment and climate change are prevalent, but when it comes to saving the planet or saving money, short-term financial priorities are taking precedence - consumers are more focused on saving money than saving the planet.

Yet this cost-conscious behaviour coexists with a growing appetite for convenience as Middle East consumers are more likely than the global average to order takeaway at least once a week and dine out regularly.

Amid this paradox of thrift and indulgence, health is emerging as a powerful force reshaping the food landscape. The growing use of GLP-1 weight-loss medications, the adoption of wearables and health apps, and the rise of Generative AI for personalised meal planning and fitness all point to a consumer base deeply invested in tech-driven wellness and tailored nutrition.

As consumers sharpen their focus on the role of food and their aspirations around it, our survey analysis finds that there is now an opportunity for new players, such as healthcare providers and technology companies, who may not have seen themselves as part of the traditional food business.

Historically, the food industry - spanning agriculture, manufacturing, retail, hospitality and nutrition - operated in separate, siloed sectors. But shifting consumer expectations, technological innovation and climate imperatives are rapidly transforming what people expect from food systems.

It’s time to reimagine growth across new frontiers - where businesses converge across sectors to meet a fundamental human need - centred on how we feed people.

Executive summary

In addition to the data we explore in this report, other new research from PwC's tracks this reinvention across sectors, identifying trends in How We Feed ourselves, alongside other industry 'domains', as a space marked by convergence, cooperation, and innovation and look at areas where value can be created in the decade ahead. By 2035, the Middle East's evolving food and consumer industry could generate a value of US$240bn, driven by smarter resilient regional food systems that harness AI for productivity gains and embed sustainability at their core.

To gain a deeper understanding of these dynamics, our latest Voice of the Consumer surveyed 2,624 respondents from Saudi Arabia, the UAE, Qatar and Egypt. Our findings have indicated that those that embrace this cross-sector convergence will not only lead in innovation but also help create resilient, purpose-led models tailored to regional needs.

Key findings

49% of the regional respondents regarded 'cost of living' as a potential threat that could have the greatest impact on their country in the next 12 months, followed by climate change and economic instability

53% of regional consumers purchase order takeaway at least once a week, compared to 34% globally. 40% dine out at restaurants one to three times a week, significantly higher than the global average of 25%.

67% of regional and global consumers are worried about the risks of ultra-processed foods and use of pesticides in food.

75% of regional consumers expressed concern about climate change, down from 83% in 2024.

9% of regional respondents said they were using prescription weight-loss drugs - nearly double the global number and a further 43% indicated they would be open to using them in future

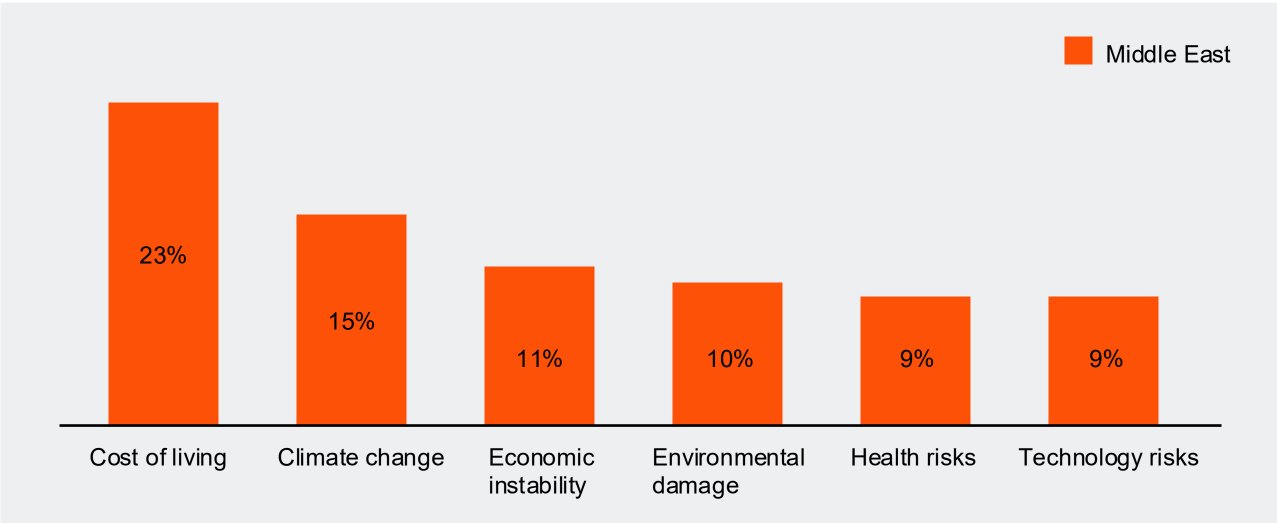
1

Costs, culture and concerns – what's shaping the consumer mindset

Compared to global averages, consumers in the Middle East have reported better financial resilience, with more than half (57%) indicating that they are 'financially secure' - paying their bills and still having enough left over for savings, holidays or entertainment. This is well above the global average of 46%. At the same time, 31% say they're 'financially coping', higher than 41% globally, with an additional 10% indicating that they are as 'financially insecure', struggling to cover bills at least some of the time.

Consumers in the region have revealed 'cost of living' as having the greatest potential to impact their country in the next 12 months, followed by climate change, economic instability and environmental damage in the region.

Q. Which of the following potential threats/risks do you feel could have the greatest impact on your country in the next 12 months? (Ranked top only)



Rising costs of living are expected to persist across the Middle East economies in 2025, driven by rising trade disruptions, global commodity price volatility and domestic supply chain constraints. In Egypt, for example, the sharp depreciation of the pound has pushed up the cost of essential imports, rising prices of essential commodities across the country like bread, cereal, meat and poultry, as well as wheat and cooking oil.[1] In the UAE, Dubai now ranks as the most expensive city in the Middle East- and 15th globally. This is often a concern for international workers relocating to the emirate, according to Mercer's 2024 Cost of Living City Ranking,[2] with high living costs forcing residents to adjust their lifestyles and reduce spending, with some even struggling to meet basic needs.

Food preferences in the region are deeply intertwined with cultural heritage and tradition. Historically, the region's bold flavours, use of aromatic spices and unique cooking methods have been passed down through generations. According to our survey, over 30% of regional consumers (compared to 19% globally) report that they mostly eat traditional food and follow cultural food practices. This highlights a strong sense of identity and pride in maintaining culinary authenticity.

Cultural impact on food choices

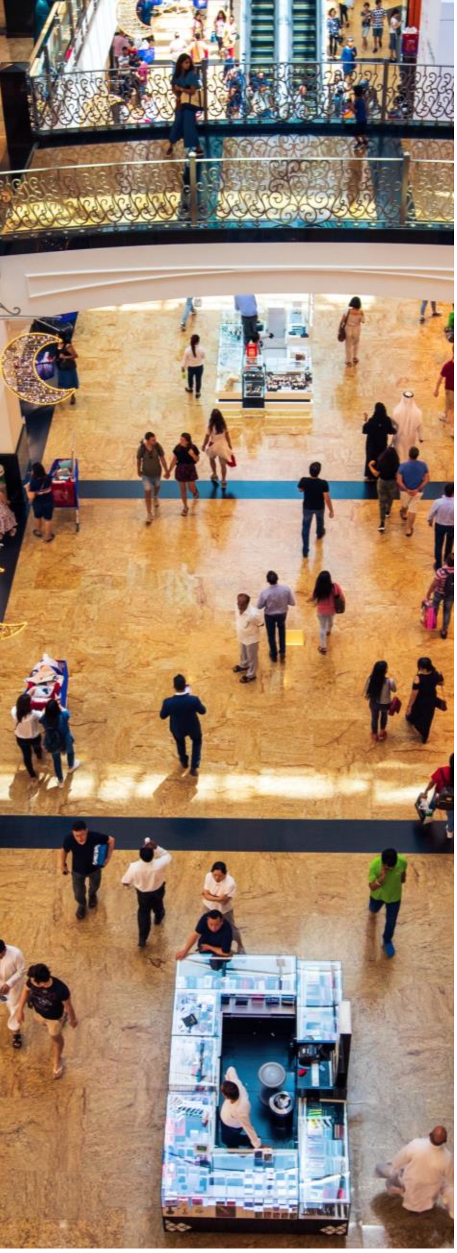
My cultural background strongly influences my food choices; I mostly eat traditional foods and follow cultural food practices

My cultural background often influences my food choices, and I sometimes explore and incorporate foods from other cultures into my diet

However, the region's cosmopolitan makeup - home to a diverse mix of nationalities - has also fostered an openness to culinary experimentation. Our data shows that over 40% of regional consumers (versus 28% globally) are open to incorporating dishes from other cultures into their diets.

2

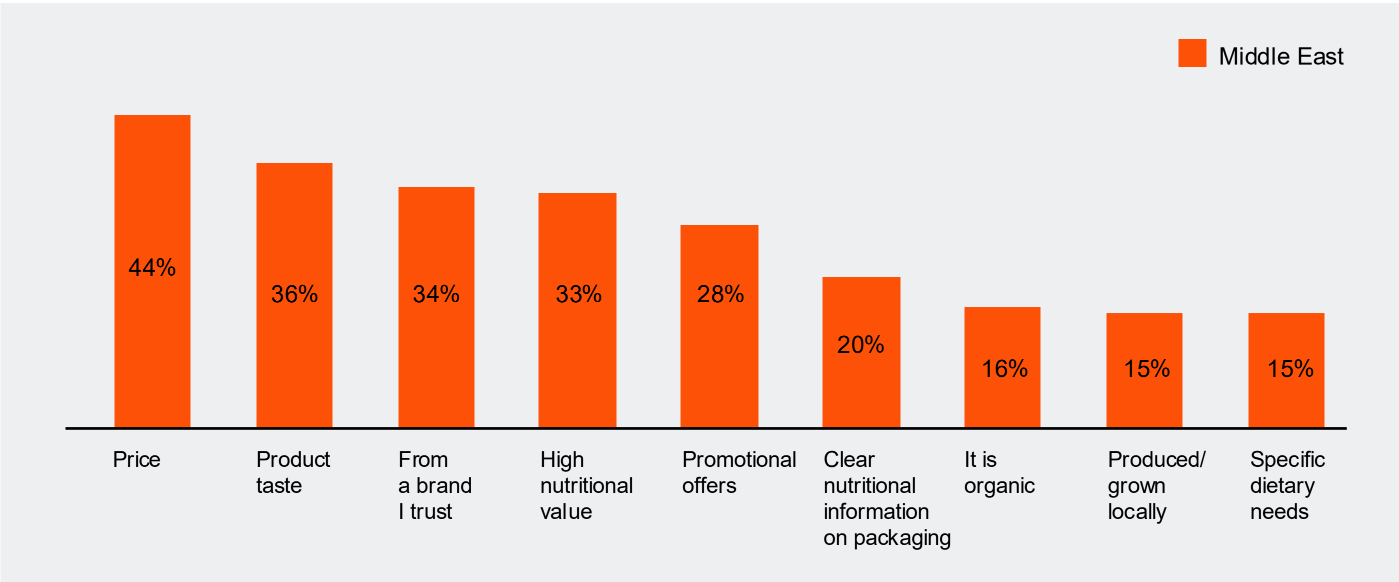
Balancing price, health and digital convenience



Cost concerns are deeply embedded in the consumer journey across the Middle East, shaping perceptions, priorities and purchase decisions. Food prices, in particular, are top of mind - driving behaviours like shopping at discount retailers, switching brands and seeking promotions. Over one third (38%) are also cutting food waste by buying only what they need.

Affordability is critical, but not the only factor at play. While 44% of regional consumers cite price as one of the top considerations in food selection (slightly below the global average of 57%), 36% prioritise taste and 34% brand trust, showing that quality and familiarity also shape their decision-making. Notably, nearly half of regional respondents listed a desire for better taste as one of their top three reasons for switching to a different brand, underscoring the competitive edge that flavour can provide. 43% of regional consumers have also used discount retailers in the past year, higher than 39% globally. Faced with a trade-off, 58% chose a cheaper, imported product over a more expensive local option.

Q. When you're choosing which food items to buy, which factors are most important to you? (Ranked in top three)

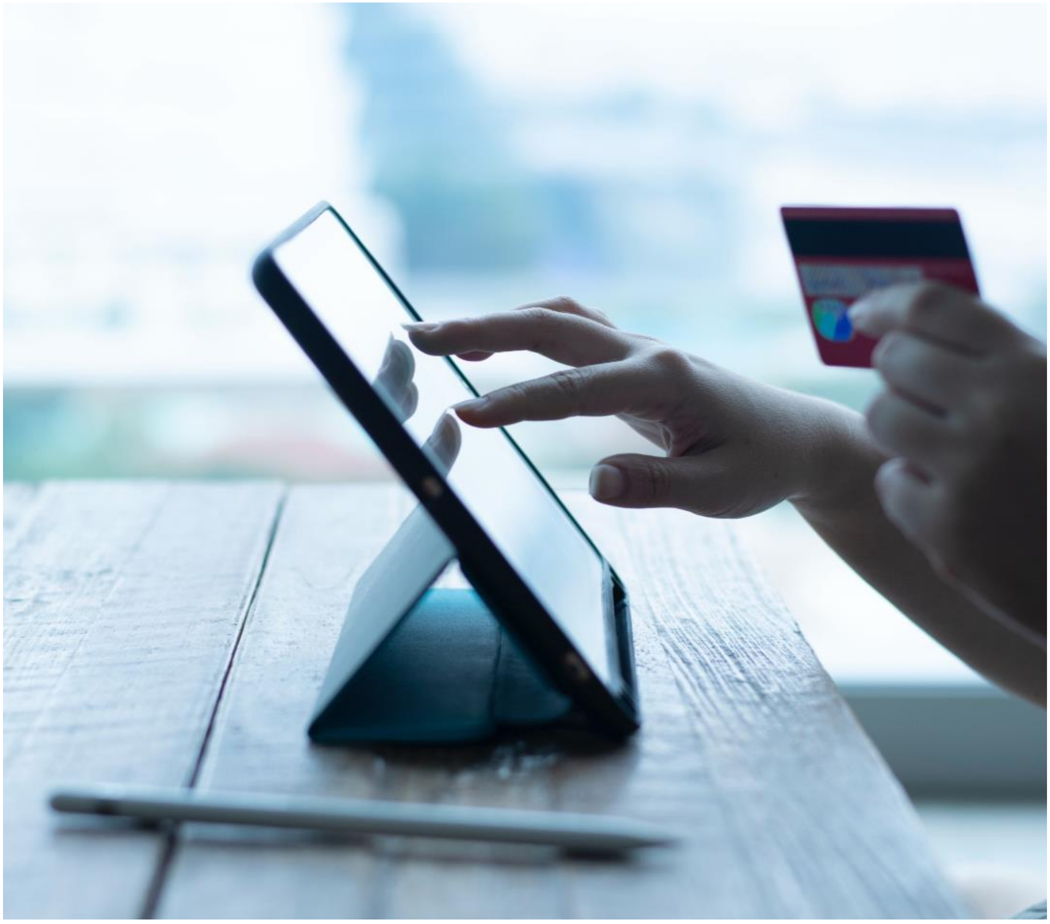


Consumers are diversifying where they shop

Our survey findings have indicated that consumers in the Middle East are adapting their habits – they are diversifying their grocery shopping habits, with a stronger inclination to support local businesses. While 72% have shopped at supermarkets in the past year, slightly below the global average of 82%, 47% have used local retailers, surpassing the global figure of 45%. Even when it comes to daily and weekly shopping, 38% of the regional consumers opt for local retailers compared to the global average of 34%.

Digital convenience

Grocery shopping behaviours in the region are changing, with digital convenience playing a growing role alongside traditional habits. When it comes to daily and weekly shopping online, on-demand delivery platforms are the top choice for daily and weekly shopping for regional consumers (30% compared to 15% globally), while online supermarkets are a preferred choice for around a quarter (25%) of regional consumers.



Health takes priority

Consumers in the region are increasingly prioritising fresh produce, with over 60% planning to increase its consumption in the next six months - outpacing the global average of 50%. At the same time, there's a noticeable shift away from prepared and packaged foods, signalling a growing focus on natural, minimally processed food options.

Health risks are top of mind, with more than 60% of regional consumers concerned about the risks associated with ultra-processed foods and the presence of pesticides, mirroring similar sentiments of their global peers. In contrast, sustainability and ethical considerations play a relatively minor role. Being produced locally (5%), organic (5%), having environmentally friendly packaging (3%) or having been ethically produced (3%) each influence only a small percentage of consumers, indicating that while these factors are acknowledged, they are not currently driving purchasing behaviour in a significant way. It reveals a consumer base that is health-conscious and value-driven, but less influenced by environmental or ethical narratives at the point of purchase.

This heightened focus on health is also reflected in perceptions of responsibility for healthier eating. Around 60% of regional respondents believe that consumers themselves are among the top three stakeholders responsible for encouraging healthy and nutritious eating habits. Nearly half (44%) have placed primary responsibility on food producers, and an equal share believe the government should play a key role, slightly below the 47% global average. This indicates that while personal responsibility is strongly emphasised in the region, there is also a clear call for greater involvement from both the food industry and policymakers to foster an environment that supports healthier choices.

Convenience is also playing a growing role in the region. Meal kit services are gaining ground, used by 28% of regional consumers compared to 15% globally. This reflects a strong demand for timesaving, flexible food solutions. This trend aligns with the rapid growth of the MENA online food delivery market, which was valued at US$9.8bn in 2022, and projected to expand at a hefty CAGR of 20.5% through 2030.[3]

3

From dining out to buying local - The lifestyle lens on food choices

While half of Middle East consumers cite the cost of living as their top concern - their behaviour reveals a paradox.

While many are clearly seeking value, actively taking advantage of deals, at the same time over 50% of regional consumers continue to buy prepared foods or order takeaway at least once a week, compared to over 30% globally. Similarly, 40% eat out one to three times per week, far above the global average of 25%.

This disconnect suggests that while financial pressures are top of mind, convenience and lifestyle habits continue to drive food-related spending in the region. It's likely the moral credential effect[4] - where making one "good" financial decision justifies indulgence elsewhere - is playing some part here, it also reflects a consumer mindset that is cost-conscious but not willing to compromise on ease and experience.

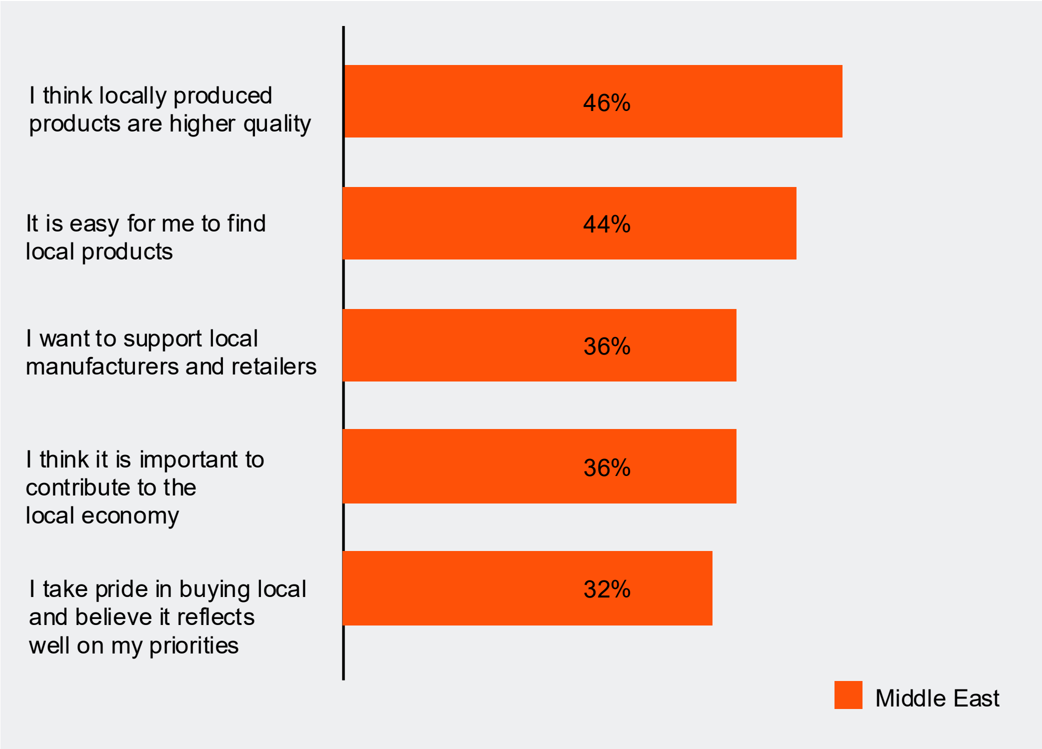
Appreciating local, but facing limits

In the Middle East, we find a general appreciation of locally grown produce. Regional consumers associate them with better health, a lower carbon footprint, enhanced food security and support the local community.

Over 30% of our survey respondents purchased locally produced goods – similar to their global counterparts. Among those who purchased food that is locally produced, nearly half (46%) cite superior quality as a top reason for doing so, followed by the belief that local products are healthier (44%), a desire to support the local economy (also 44%) and the need to support local manufacturers 36%.

Environmental considerations, however, rank lower, with only one-fifth of survey respondents (21%) concerned about climate and their food's carbon footprint as among the top three reasons for buying local food.

Q. You have noted that you typically buy food that is locally produced. What are the main reasons for that choice? (Ranked in top three)

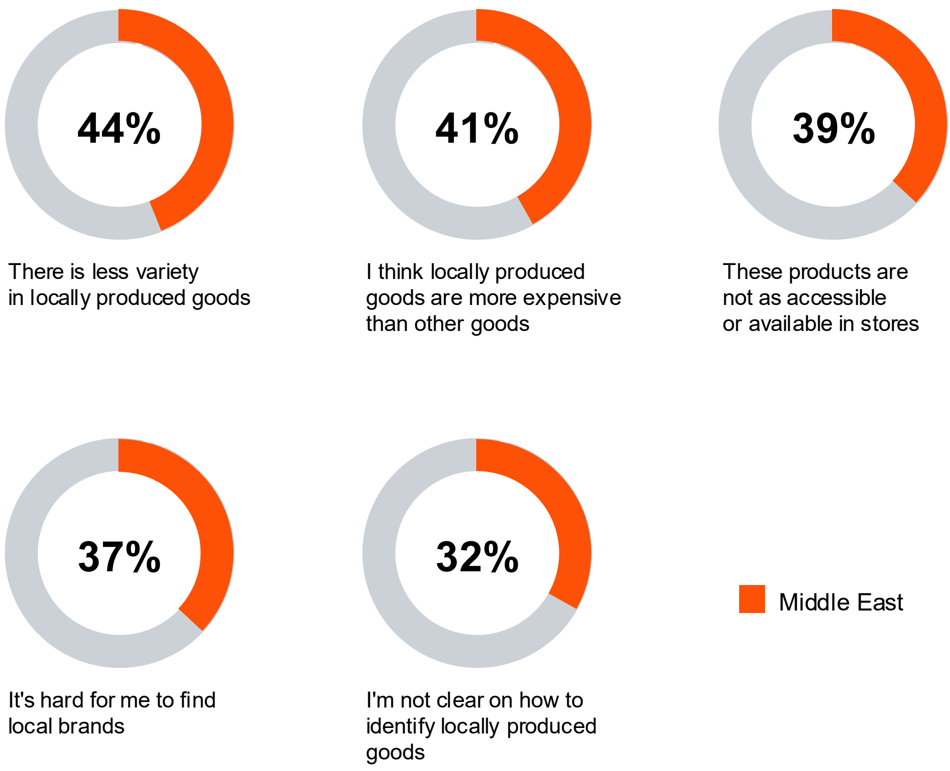


Lack of variety, limited availability

The region's heavy reliance on imported food also creates challenges around easy accessibility of local produce. Over 50% of the food consumed in MENA is imported, with countries like the UAE depending on imports for around 90% of their food supply.[5]

Around 40% of the regional respondents have indicated that they don't typically buy food that is locally produced, due to limited variety, difficulty finding local products and higher costs. Notably, more than a third of the regional consumers cited accessibility as a barrier, saying local produce was not easily available in stores.

Q. Which of the following potential threats/risks do you feel could have the greatest impact on your country in the next 12 months? (Ranked in top three)



Homegrown produce is usually more expensive than imported varieties because of high energy costs that act as a barrier for local farms in the region.[6] Despite innovations like solar power, many farms cannot afford such investments, leading to higher prices for local produce compared to imports. However, growing demand, bulk orders, and a rising sense of corporate responsibility are beginning to make local farming more commercially viable. The path forward lies in focusing on crops that are practical and cost-effective to grow locally, while recognising that not all food types can - or should - be produced in the region.

4

The future of health – a wellness wake-up call

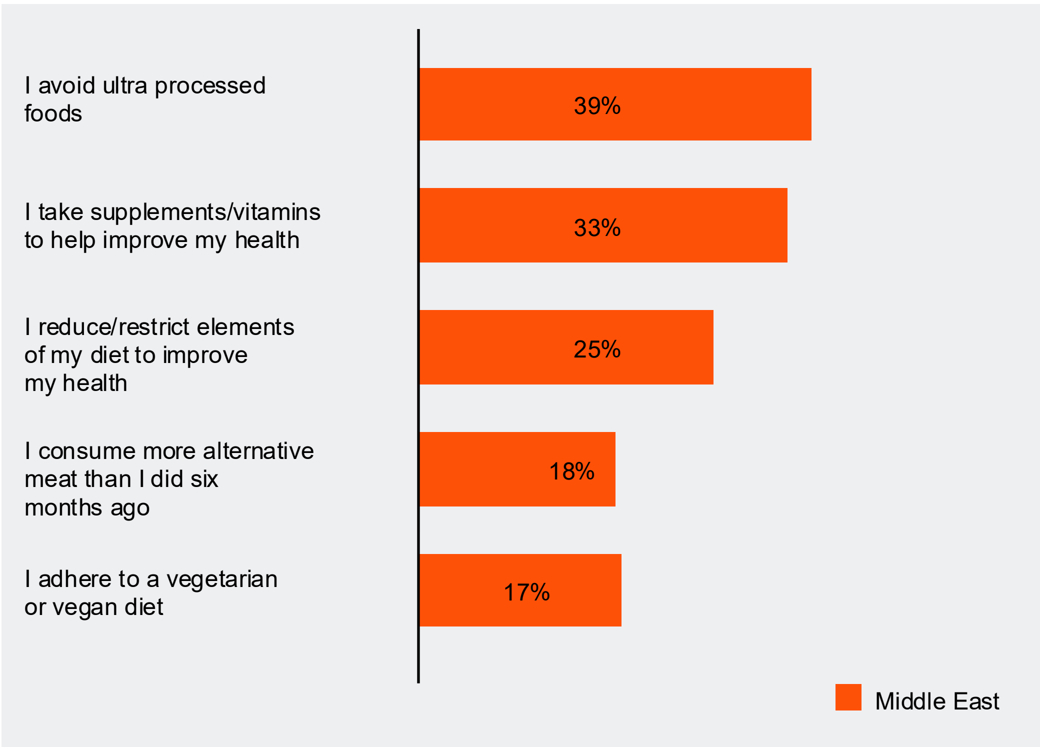
A significant 69% of regional consumers we surveyed rate their general health as excellent or very good, well above the global average of 46%. However, this positive self-assessment exists alongside persistently high rates of obesity across the Middle East.

In 2022, the prevalence of obesity among adults in the Middle East stood at 32.1%, more than double the global average[7] suggesting there are underlying health risks to address. Looking ahead, projections indicate that by 2050, 55.4% of young people aged 5–24 in the MENA region could be overweight or obese, with some GCC countries potentially exceeding 70%.[8]

These figures highlight an important opportunity to align health awareness with actual health outcomes, reinforcing the need for continued education, healthier habits and proactive wellness strategies across the region.

Our survey findings, however, indicate a clear desire to become healthier. Over 30% of respondents in region are avoiding ultra processed food and a third are regularly taking supplements, with a further 50% taking supplements "to some extent". People are also more willing here, compared to globally, to try "alternative meats" or vegetarian and vegan options.

Q. To what extent do you make the following health-related choices in your diet? (To a great extent)



Rising consumer expectations from F&B companies

When asked how major food and beverage (F&B) companies could contribute to improving consumer health and wellness, regional respondents identified top three priorities - they expected more products targeted to specific health requirements, better nutrition and lower-calorie options. These expectations closely mirror global sentiments. In addition to this, nearly 40% of respondents expected companies to educate consumers on health and nutrition, highlighting a growing demand for informed guidance from the industry.

Smart health for better outcomes

The Middle East consumer has embraced the use of technology for improved lifestyle and health outcomes, with a strong desire for real-time insights and tailored recommendations for personalised healthcare.

Smart wearables are revolutionising health management by offering data-driven wellness solutions. Adoption of healthcare apps and wearable technology in the Middle East significantly exceeds global averages - only 12% of regional respondents do not use any form of healthcare tech, compared to 30% globally. This shows a strong regional appetite of digital health tools for monitoring and enhancing personal wellbeing.

Q. Do you use healthcare apps (mobile applications that provide users with health-related information and services) or wearable technology (e.g., fitness trackers, smartwatches) for any of the following reasons/activities?

42% **Exercise instruction and monitoring**

35% **Mental health and wellbeing**

29% **Managing chronic conditions**

41% **Dieting, weight loss and healthy eating**

34% **Sleep tracking**

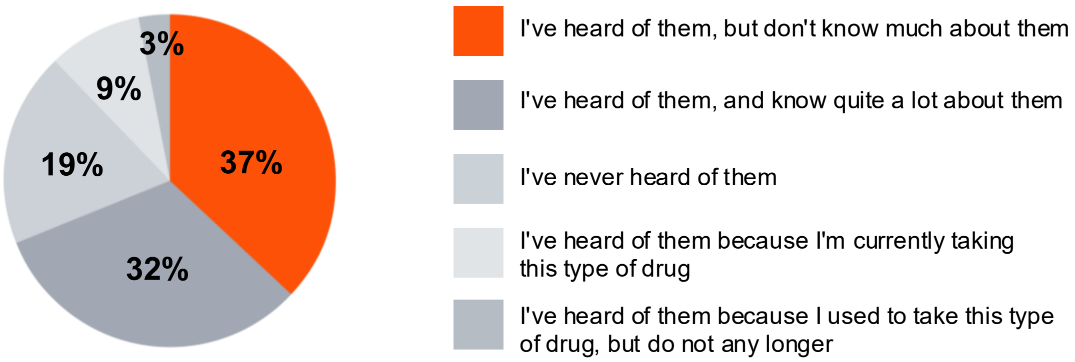
Middle East

Over 40% of regional survey respondents rely on wearable technology and health apps for exercise, activity tracking, dieting, weight loss and healthy eating, exceeding the global average by ten percentage points. This has led to some change in daily habits for over 50% of regional users, with a significant change experienced by 41% of the survey respondents.

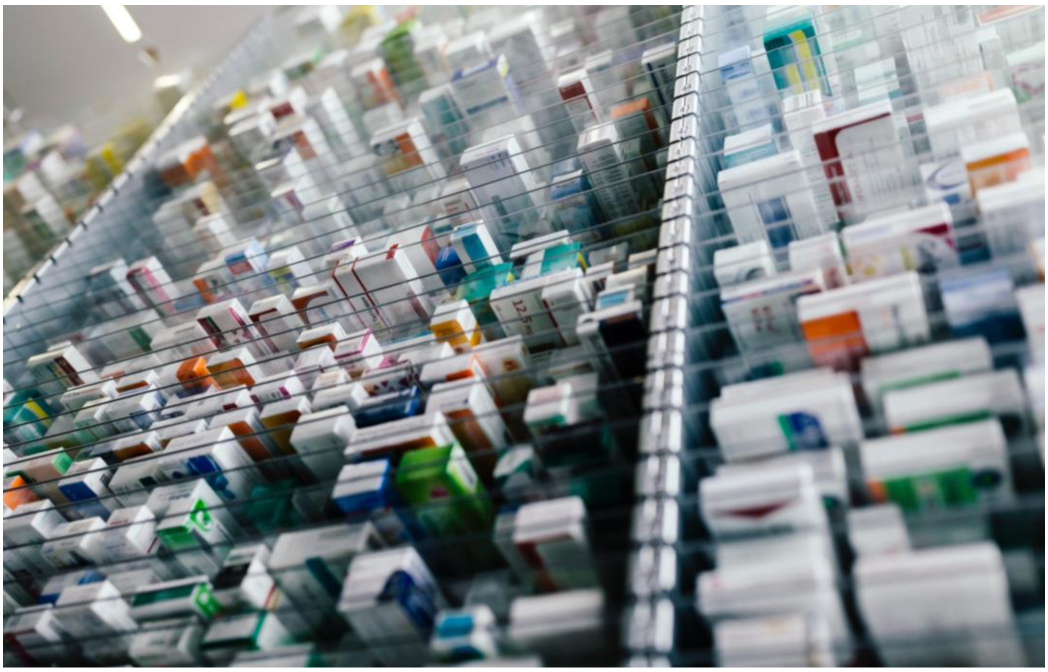
This trend is reflected in the market outlook. The MEA wearable medical device market is projected to reach US$3.29 bn by 2033, a CAGR of 18.1% between 2024 and 2033.[9] This includes use of technologies such as smartwatches, fitness trackers, wearable ECG monitors, insulin pumps and continuous glucose monitoring devices - all designed to collect information about vital signs, physical activity, sleep patterns and blood glucose levels, among others. Globally, the market for smart wearables is also growing rapidly. Currently valued at US$85.2bn, it's projected to reach US$506bn7 by 2035, underscoring the scale and potential of this health-tech revolution.

There is also a growing openness to using Generative AI (GenAI) to enhance home food and meal planning. Over 40% of regional consumers are comfortable using it for meal planning and personalised diet plans. Additionally, 51% regionally - compared to 45% globally - are using it to create personal training and exercise programmes.

Q. Which of the following best describes your awareness of weight-loss prescription drugs used to treat type 2 diabetes and weight-loss (e.g., Ozempic, Mounjaro, Wegovy, Zepbound)?



At February's Global Healthspan Summit in Riyadh, experts stressed the urgent need to rethink how life-limiting health conditions are managed - shifting focus from treatment to prevention. But while GLP-1 agonist medications, such as Ozempic and Wegovy, have impacted care for diabetes and obesity, they can pose serious risks, including arthritis and potentially fatal pancreatitis.[10] Emergency rooms in the region are increasingly seeing complications linked to unsupervised use of weight-loss drugs. Medicine regulators are co-ordinating efforts to regulate the distribution of GLP-1 drugs and prevent illegal sales.[11]



5

Climate concern evident, but commitment remains uneven

Consumer concern about climate change in the Middle East remains high but has declined slightly since last year. According to our 2025 survey findings, 75% of regional consumers surveyed expressed concern about climate change, down from 83% in 2024.[12] This trend mirrors the global decline, where concern dropped from 85% in 2024 to 82% this year.

Nearly one in five consumers in the region say they worry about climate change daily, indicating continued urgency among a significant portion of the population. This is not surprising, given the region's vulnerability to climate change. The MENA region is experiencing some of the fastest global warming rates. Recent projections show that by the end of the century, temperatures in some parts of the region could rise by up to 9°C - potentially occurring two to three decades earlier than in other areas of the world.[13]

When purchasing food products, consumers identified the following as the top three most important sustainability practices: Pesticide-free products, locally produced goods and environmentally friendly packaging. In fact, when consumers we surveyed were told that actions taken to improve the health of the land and the environment (for example, improving soil quality and increasing biodiversity), can result in higher costs for food producers, 45% of regional consumers said they would be willing to pay more for their food to support the health of the land and environment.

Q. Have you taken any of the following actions to reduce your impact on climate change with the food you buy and eat?

However, a notable 23% of regional respondents also reported being not worried at all, compared to just 16% globally - highlighting a growing divide in levels of concern across the region. Over half of regional consumers in our 2025 survey said they do not regularly seek information on food brands' climate and sustainability efforts, and a further 25% rarely or never seek this information.

Findings have also revealed that regional consumers primarily learn about a company's climate and sustainability efforts through social media (72% vs 62% globally), followed by traditional media (47% vs 50% globally) and information from family and friends (44% vs 35% globally).

6

Winning with the Middle East's health-conscious, value-driven consumer

Our survey findings have indicated that the future of food depends on a unified effort across businesses, government and sectors such as technology, health and mobility to reimagine food systems, ensure sustainability and regional food security.

Key takeaways

1: Scale local food systems through partnerships

While demand for local, sustainable food is rising, many regional farms still struggle with scalability, pricing and consistent supply due to limited infrastructure and fragmented value chains.

Opportunity: Regional farms that form the backbone of the Middle East's agriculture and food production sector can close this gap by forming long-term cross-sector partnerships with players in agri-tech, logistics, research and innovation to strengthen local farming ecosystems. This in turn can lower production costs while improving quality and environmental impact enabling consumers to access a variety of local products at competitive prices.

In the region, US-based Plenty is collaborating with the UAE's Mawarid in a US$680m joint venture to establish indoor farms in the region that will produce over 4.5m pounds (2m kg) of strawberries annually.[14] Similarly, Al Ain Farms Group has partnered with Finland's FoodIQ to introduce advanced food production technologies to the UAE.[15]

2: Capitalise on health as a core driver, embrace tech-integrated wellness

Consumers are using smart wearables and personalised meal planning tools, exploring weight-loss medications and supplements.

Opportunity: Businesses can capitalise on "health as a lifestyle" priority by developing wellness-focused, functional products that align with consumers' personal health goals.

There is growing space for personalised nutrition plans, AI-powered supplement recommendations and app-integrated meal tracking that blend convenience with scientific credibility. Personalised meal planning companies can develop partnerships with fitness and health-tracking platforms to offer personalised meal plans. Right Bite in the UAE, for example, along with others such as Calo (Saudi Arabia), WellGenix (Oman) and Diet Delights (Qatar) offer tech-enabled meal plans that can be integrated with health tracking apps.

There is also opportunity for businesses to leverage data analytics to understand consumer preferences and tailor product offerings accordingly. Companies like Foodics (UAE) collect and analyse sales data to help restaurants identify best-selling items and optimise menus, leading to increased profitability.[16]

With regional interest in supplements outpacing global averages, businesses also have a unique opportunity to create holistic health ecosystems, combining physical products with digital experiences to support long-term wellness and brand loyalty.

3: Make healthy convenience an attractive formula

Despite budget concerns, a sizable number of consumers in the region continue to spend on takeout, convenience foods and dining out.

Opportunity: Since food delivery is big in the region, restaurants can leverage these services and scale delivery operations with ghost kitchens - enabling them to offer affordable, health-conscious, ready-to-eat meals that balance nutrition and convenience, all without the need for new storefronts.

In the region, Kaykroo and Kitopi (UAE), Chefaa Kitchen (Kuwait) and Chefz (Saudi Arabia) are some of the players in this sector that are empowering restaurants to launch without the need for a physical walk-in location.

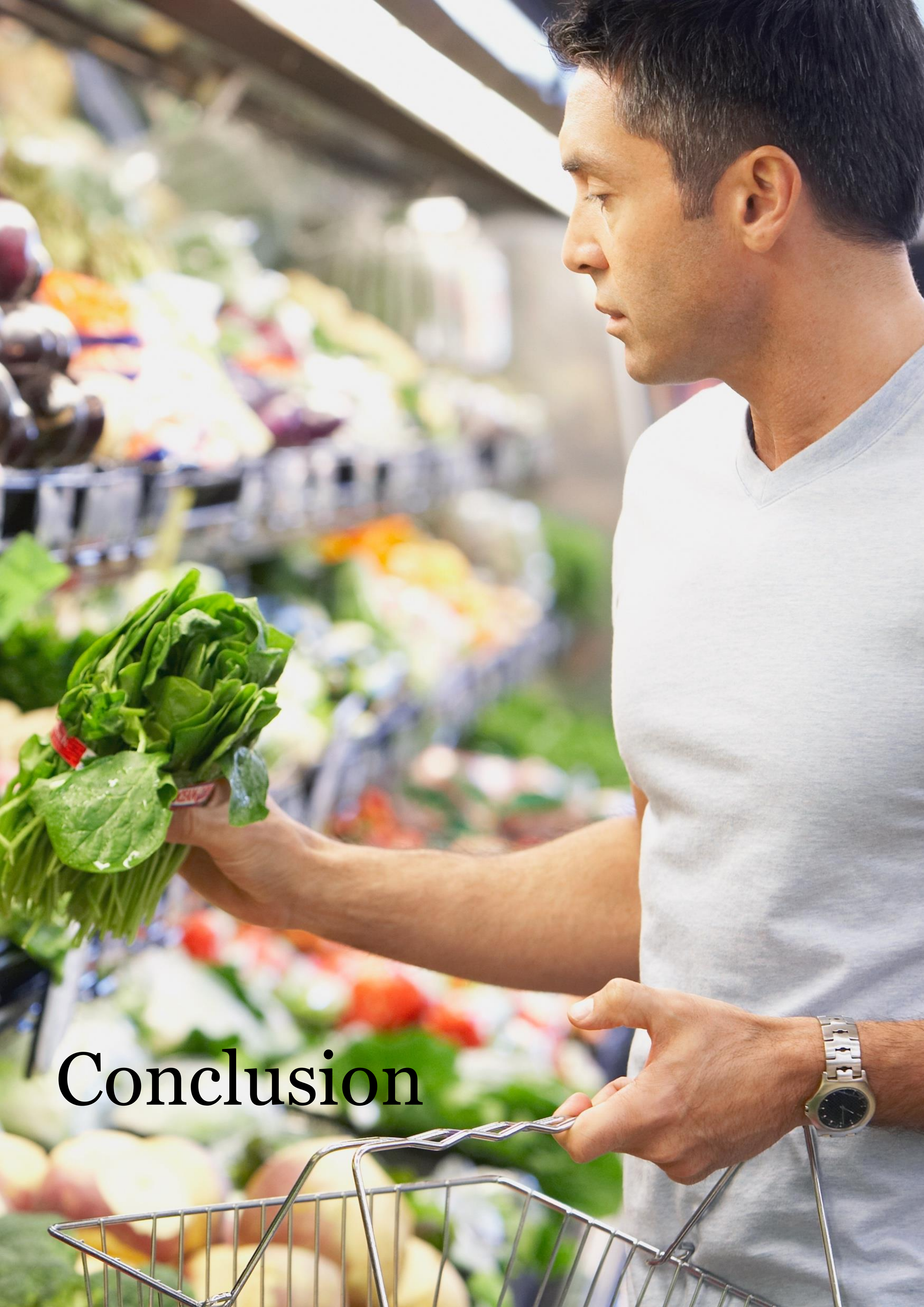
Businesses can also introduce subscription models for meal kits or prepared meals, providing convenience and fostering customer loyalty. In the Middle East and Africa, the market for meal kit delivery services is forecast to reach $1.73bn by 2030, growing at a CAGR of 14%.[17]

Hello Chef (UAE), Lean Meals (Saudi Arabia), EAT! by Chef's Garden (Oman), Calorie Care (Bahrain), among others, offer weekly meal kit subscriptions, delivering pre-portioned ingredients and recipes, catering to busy consumers seeking convenient cooking solutions.

At the same time, mobility platforms can evolve into food access points - through grab-and-go kiosks at transit hubs or commuter-friendly meal offerings, unlocking new revenue streams and cross-sector partnerships.

Consumers in the Middle East are redefining what they expect from the food industry. Health, convenience and trust now top the menu. At the same time, rising costs and climate pressures are challenging both consumers and companies to make smarter, more sustainable choices. It is also interesting to see that while environmental considerations remain secondary for many, the demand for healthier, locally produced food is growing. The companies that thrive will be those that meet people where they are – with affordable, nutritious, tech-savvy and locally rooted solutions that fit modern lifestyles and values. This is no longer a nice-to-have. It's the recipe for leadership in a dynamic and fast-evolving market.

Norma Taki



Conclusion

About the survey

Data was collected between January 16 and February 12, 2025, resulting in 21,075 completed responses across 28 countries. The Middle East accounts for 12% of the total sample, with 2,624 responses: Saudi Arabia (1,014), the UAE (1,002), Qatar (300), and Egypt (308). The sample is evenly split by gender (50% female, 50% male), with 81% aged between 18 and 44. Millennials represent 50% of respondents, while GenZ accounts for 31%. In terms of residence, 82% live in large cities, 11% in suburban areas, and 6% in small towns or rural locations.

Employment-wise, 76% of participants are either self-employed or full- or part-time employees, while 24% are not currently working. Regarding household composition, 79% live in households with children, 21% in households without children (2% are single-adult households). In addition to core demographics, other profiling segments are included in the analysis.

Contact us

Norma Taki
Deals Partner and
Consumer Markets Leader,
PwC Middle East,
norma.taki@pwc.com

Roy Hintze
Partner, Middle East
Consumer Markets,
PwC Middle East,
roy.hintze@pwc.com

Imad Matar
Partner, Transaction Services
Leader, PwC Middle East,
imad.matar@pwc.com

Maye Ayoub
Partner, Middle East
Consumer Markets,
PwC Middle East,
maye.ayoub@pwc.com

Contributors

Razan Sawalha
Consumer Markets
Marketing Manager,
PwC Middle East,
razan.sawalha@pwc.com

Matt Pomroy
Creative Content Manager,
PwC Middle East,
matt.pomroy@pwc.com

Raghad Jaber
Consumer Markets
Marketing Associate,
PwC Middle East,
raghad.jaber@pwc.com