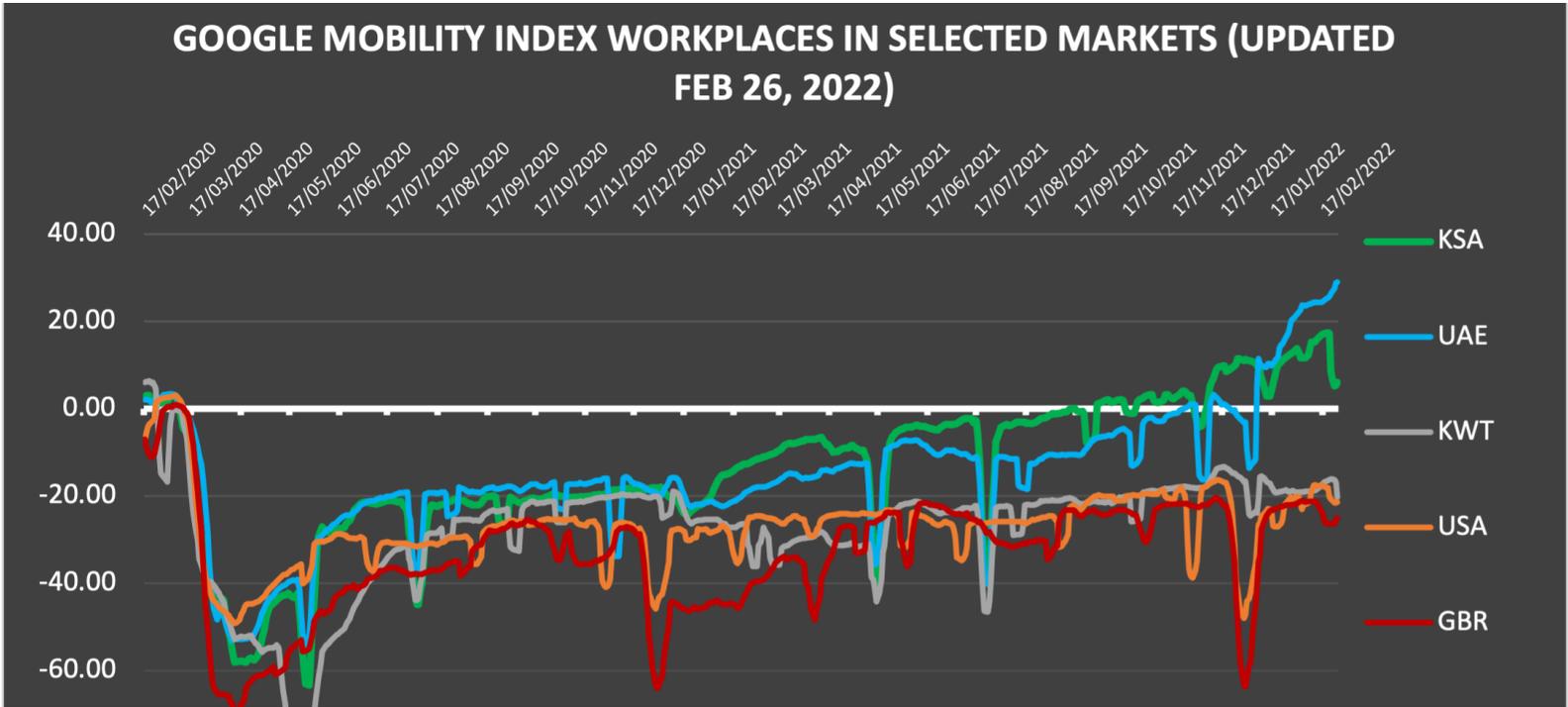




# FOODSERVICE PERSPECTIVES IN SAUDI ARABIA

March 2022



## INCREASING WORKPLACE MOBILITY

With Covid restrictions lifting on March 05, 2022, Saudi Arabian market is set to continue its upward mobility trend on workplaces. It already exceeds many analog markets, except for UAE, on this measure. Return to work and education means return of many missing eating occasions earlier in the day.



## CONTINUED SALES RECOVERY

Saudi Arabian market lost 1/3rd transactions during Covid compared to pre-covid period. Mingora's marketplace data indicates sales are on a continued upward trajectory in KSA, even as market hasn't fully recovered from Covid-19 impact.

Important to note: Saudi Arabia restaurant sector was in negative growth for 3 years prior to the pandemic. This means much repair work ahead.



# RISING CONSUMER CONFIDENCE

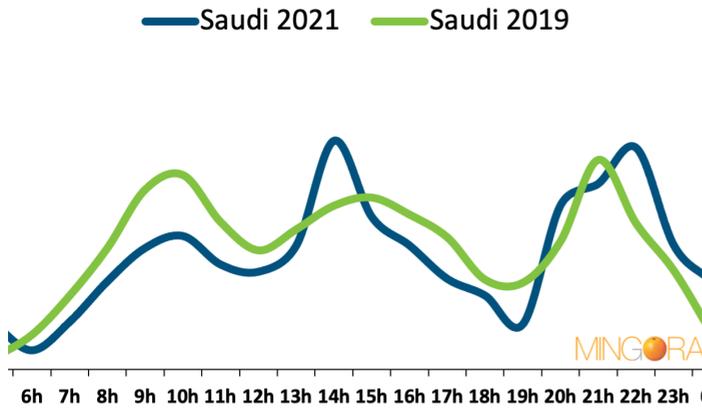
Consumer confidence in Saudi Arabian economy is continuously surging, far ahead of US and right behind that of UAE. It means economic recovery is well underway even if some consumer spending had been curtailed so far due to restrictions. With the full lifting of restrictions, this trend is set to continue, barring any external economic shocks.

# PATH TO FULL RECOVERY

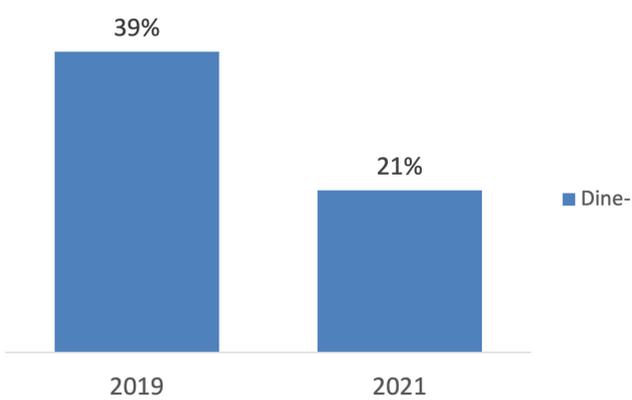
Mingora's Food Panel 2021 indicated a major shift in eating habits for consumers in dayparts and place of consumption. Much of the recovery this year will depend on two factors.

1. How quickly the millions of lost occasions of breakfast, evening and late nights return to normal for Saudi businesses – a factor directly related to consumer mobility.
2. How confidently consumers can return to workplaces and education which will restore particularly on-premise eating. Before Covid, dine-in was the single largest channel in Saudi Arabia.

**CONSUMER VISITS % BY TIME OF DAY**  
MINGORA FOOD PANEL 2021 VS 2019



**DINE-IN %AGE OF VISITS - KSA**  
MINGORA FOOD PANEL 2021 VS 2019



# MINGORA FOOD PANEL WAVE 1, 2022

## SAUDI ARABIA, THE UAE, OMAN

*Food-Panel is the largest restaurant and foodservice tracker in MENA region. It monitors consumer visits to commercial and non-commercial foodservice locations, tracking the total foodservice industry and specific segments, categories, chains, and food items*

*Get to know restaurant and foodservice sector by putting the consumer in charge, identify opportunities in Product Development, Operations, Development, Supply Chain and Marketing, benchmark performance vs competition and unlock growth and innovation in your products and services..*

*The 2022 Food Panel is in field in Saudi Arabia, UAE and Oman, capturing restaurant and eating places visit behaviors of 25,000+ respondents to capture these change and identify opportunities for growth and innovation.*

*Mingora is Chief Data Officer for restaurant and foodservice businesses in MENAT region. We combine the power of data with our extensive knowledge and network in global restaurant industry to develop innovative products that transform performance.*

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