

# **Saudi Arabia Fashion Market, By Product Type (Apparel, Footwear, Accessories), By Distribution Channel (Offline, Online), By Region, Competition, Forecast & Opportunities, 2020-2030F**

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## **Abstracts**

Saudi Arabia Fashion Market was valued at USD 4.25 billion in 2024 and is anticipated to grow USD 5.70 billion by 2030 with a CAGR of 5.07% during forecast period. The Saudi Arabian fashion market is witnessing significant growth, fueled by changing consumer preferences and a younger, fashion-conscious population. As the country diversifies its economy through Vision 2030, fashion and retail sectors have become pivotal to its development. International brands are increasingly entering the market, while local designers are gaining recognition. E-commerce is rapidly expanding, offering consumers more convenience and a broader range of choices. In 2024, a study highlighted that the digital fashion marketplace in Saudi Arabia operates on a robust dual-channel approach. E-tailing platforms, including popular names like Namshi, Shein, Temu, and Ounass, collectively account for 50% of the online fashion market in the Kingdom. On the other hand, omnichannel players such as Amazon, Noon, and Centrepoint contribute to 30% of the market share. These platforms have gained traction by offering extensive product ranges, exclusive deals, and a seamless online shopping experience tailored to local preferences. This dynamic shift promises a vibrant future for the Saudi fashion industry.

### **Key Market Drivers**

#### **Changing Demographics and Growing Youth Population**

One of the most significant drivers of the Saudi Arabian fashion market is the country's youthful population. With over 50% of the population under the age of 30, the demand

for trendy, modern, and fashion-forward products is rapidly increasing. Young Saudis, especially millennials and Gen Z, are highly engaged in global fashion trends and are influencing the market with their preferences for modern, stylish apparel. They are more inclined toward international brands, yet also show growing support for local designers, which has led to a vibrant mix of global and homegrown fashion.

This demographic is heavily influenced by social media, where platforms like Instagram, TikTok, and Snapchat are not only popular for entertainment but also as sources of fashion inspiration. These young consumers are increasingly seeking brands and designs that reflect their personal style, preferences, and individuality. This has led to a surge in demand for unique, custom, and designer pieces. Fashion is becoming an integral part of their social identity, and they are more willing to spend on clothing, accessories, and beauty products that resonate with their personality and status.

### Economic Transformation and Increasing Disposable Income

The economic reforms outlined under Saudi Arabia's Vision 2030 are another driving force behind the growth of the fashion market. As the kingdom moves away from oil dependency, there has been a concerted effort to boost the private sector, promote tourism, and enhance the overall standard of living. This economic diversification has contributed to higher disposable incomes, particularly among the younger generation, creating a significant demand for premium and luxury fashion items.

With the rise in disposable income, consumers are increasingly willing to indulge in fashion as a form of self-expression and luxury. As Saudi Arabia's middle class continues to expand, the demand for both affordable and high-end fashion products is surging. The shift towards an urbanized lifestyle, especially in cities like Riyadh and Jeddah, has encouraged more urban shopping habits, with consumers spending more on clothing, footwear, and accessories. Shopping malls and retail complexes are becoming increasingly sophisticated, and consumers are attracted to the high-end shopping experiences these locations offer.

### Cultural Shifts and Changing Attitudes Toward Fashion

In recent years, Saudi Arabia has witnessed substantial cultural shifts, especially with the government's efforts to modernize and open up society under Vision 2030. Reforms like the easing of restrictions on women's rights have played a crucial role in reshaping the fashion landscape. Women are now more actively participating in the fashion market, not only in terms of purchasing apparel but also as consumers who are

contributing to the design, retail, and entrepreneurial aspects of the industry.

Additionally, cross-border transactions (CBT) in the Saudi Arabian fashion market have experienced a significant surge, with their share rising from 26% in 2022 to 28% in 2023. This growth is primarily driven by the increasing popularity of fast fashion, as international brands like Shein, Temu, and Trendyol continue to dominate consumer preferences. These platforms attract a growing customer base by offering extensive collections of affordable and stylish apparel that meet the rising demand for budget-friendly yet fashionable clothing among Saudi consumers.

## Key Market Challenges

### Cultural Sensitivity and Modesty Regulations

One of the key challenges facing the Saudi Arabian fashion market is navigating the country's cultural sensitivity and modesty regulations. Saudi Arabia is a conservative society, and while recent reforms have increased personal freedoms, the principles of modesty rooted in Islamic traditions still strongly influence the fashion industry. This affects both domestic and international brands entering the market, as they must adapt their offerings to meet local norms.

For women, modesty is a central consideration in fashion, which has led to a demand for modest yet fashionable clothing, such as abayas and hijabs. However, with growing liberalization and changing social norms, consumers are increasingly seeking more modern styles, often blending traditional modest fashion with contemporary trends. Brands must strike a delicate balance between meeting the demand for modest clothing while also appealing to those desiring more Westernized, trendy styles. This creates a unique challenge for fashion companies that must be both culturally respectful and innovative to succeed in the market.

### High Competition and Market Saturation

The Saudi Arabian fashion market is becoming increasingly competitive as both local and international brands vie for consumer attention. The market has seen a surge in the number of global fashion brands entering, including luxury labels, fast fashion giants, and e-commerce platforms. This growing influx of brands has led to market saturation, making it difficult for new entrants to gain a foothold without significant investment in brand recognition and consumer loyalty.

Local designers and homegrown fashion labels also face stiff competition from international brands that are often able to leverage larger budgets, established reputations, and more extensive marketing strategies. As a result, local brands must be highly innovative, offer unique designs, and create a strong emotional connection with consumers to differentiate themselves. This intensifies the need for effective branding and marketing strategies that resonate with the target audience, particularly in a market with diverse tastes and cultural nuances.

## Key Market Trends

### Rise of Modest Fashion

One of the most significant trends in the Saudi Arabian fashion market is the rise of modest fashion, a movement that aligns with cultural and religious values while embracing modern, stylish designs. Modesty has always been a key aspect of Saudi fashion, especially for women, with traditional garments like the abaya and niqab being widely worn. However, in recent years, there has been a shift towards a more stylish and contemporary interpretation of modest clothing, leading to the emergence of the modest fashion trend.

The demand for modest fashion is not only driven by religious or cultural values but also by a desire for personal expression. Young Saudi women are increasingly looking for stylish yet modest clothing that aligns with their values while allowing them to express their individuality. Local and international designers have recognized this shift and are creating modern abayas, dresses, and separates that combine both modesty and high fashion.

### Luxury Fashion and International Brands

Saudi Arabia's fashion market is increasingly characterized by a growing demand for luxury fashion items. As the country's wealth continues to rise, especially among the younger, affluent population, luxury goods have become a symbol of status and success. Saudi consumers, particularly those in urban centers like Riyadh and Jeddah, are increasingly seeking high-end fashion products, including luxury clothing, accessories, and footwear.

International luxury brands like Louis Vuitton, Gucci, Prada, and Chanel are expanding their presence in Saudi Arabia, particularly in the kingdom's major shopping malls and luxury retail outlets. These brands are tailoring their offerings to meet the tastes and

preferences of Saudi consumers, with exclusive collections and limited-edition items often being introduced to cater to the country's growing demand for luxury goods.

## Sustainability and Ethical Fashion

Sustainability is an emerging trend that is beginning to take hold in the Saudi Arabian fashion market. As global awareness of environmental issues grows, Saudi consumers, particularly the younger generation, are becoming more conscious of the impact their purchasing decisions have on the planet. This shift towards sustainability is encouraging fashion brands to adopt more eco-friendly and ethical practices, such as using sustainable materials, reducing waste, and ensuring fair labor practices.

Sustainable fashion brands are gaining traction in Saudi Arabia, as consumers are increasingly seeking products that align with their values of environmental stewardship and ethical consumption. Local and international brands are now focusing on creating fashion lines that prioritize eco-friendly materials, such as organic cotton, recycled polyester, and biodegradable fabrics. Additionally, fashion companies are investing in reducing their carbon footprint through more sustainable manufacturing processes.

## Segmental Insights

### Product Type Insights

Apparel was the dominating segment in the Saudi Arabian fashion market, driven by strong demand for both traditional and modern clothing. The preference for modest fashion, such as \*abayas\* and modest dresses, alongside the rising trend for contemporary styles, has shaped this segment. Saudi consumers seek a blend of cultural relevance and global fashion trends, with women's and men's apparel gaining popularity. Additionally, the increasing influence of younger generations and urbanization has led to a shift toward fashionable yet modest clothing. With an expanding retail and e-commerce sector, the apparel segment continues to lead Saudi Arabia's fashion market.

### Regional Insights

Northern and Central Saudi Arabia, particularly cities like Riyadh and Jeddah, dominate the fashion market due to their economic significance and high population density. Riyadh, the capital, is a key hub for both traditional and modern fashion, attracting major international brands and luxury retailers. Jeddah, known for its cosmopolitan nature,

also plays a central role in shaping fashion trends, with a growing demand for global fashion labels and local designs. These regions benefit from a large, affluent population, increasing disposable incomes, and urbanization, making them primary markets for apparel, luxury goods, and online fashion retail in Saudi Arabia.

### Key Market Players

Middle East – Fad International Co. (femi9)

Majid Al Futtaim Holding LLC

Apparel Group

Alyasra Fashion

Almutlaq Group

Rubaiyat Modern Luxury Products Company Ltd.

Nysaa Trading LLC

AlWahida Equipment Co. Ltd (Zara)

Sun and Sand Sports LLC (Nike)

Landmark Arabia Co. (Max Fashion)

### Report Scope:

In this report, the Saudi Arabia Fashion Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Saudi Arabia Fashion Market, By Product Type:

Apparel

Footwear

Accessories

Saudi Arabia Fashion Market, By Distribution Channel:

Offline

Online

Saudi Arabia Fashion Market, By Region:

Northern & Central

Western

Southern

Eastern

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Saudi Arabia Fashion Market.

Available Customizations:

Saudi Arabia Fashion Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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