

Saudi Arabia Online Grocery Delivery Market By Product Category (Fresh Products, Household Products, Packaged Food & Beverages, Personal Care, Others), By Platform (Mobile Application, Desktop Website), By Mode of Payment (Pre Delivery Online Payment, Card on Delivery, Cash on Delivery), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

Market Overview

The Saudi Arabia Online Grocery Delivery Market was valued at USD 1.65 billion in 2024 and is projected to reach USD 4.98 billion by 2030, expanding at a CAGR of 20.21% over the forecast period. Growth in this market is largely driven by increasing digital adoption, particularly via mobile apps that simplify the grocery shopping process. Urban consumers, especially working professionals, are increasingly drawn to the time-saving convenience of home deliveries. The market is also benefitting from the rise in e-commerce infrastructure, streamlined digital payment solutions, and a broader shift towards contactless shopping post-pandemic. Retailers are enhancing consumer engagement through promotional offers, product variety, and faster service. The convergence of convenience, technology, and consumer lifestyle shifts is positioning online grocery delivery as a mainstream retail channel across Saudi Arabia.

Key Market Drivers

Rising Working Population Across the Region

The increasing proportion of Saudi Arabia's population engaged in full-time employment is a key growth driver for the online grocery delivery market. In 2024, approximately 73.2% of the population is within the working-age group. This demographic, particularly concentrated in cities like Riyadh and Jeddah, demands efficient and time-saving solutions to manage daily tasks such as grocery shopping. Online grocery platforms cater to this need by offering delivery services that reduce the burden of in-person store visits. The Saudi Vision 2030 initiative, which supports digital transformation across sectors, further complements this demand shift. As dual-income households grow and urban life becomes more fast-paced, digital grocery platforms are becoming an essential part of modern retail, offering convenience tailored to evolving consumer lifestyles.

Key Market Challenges

Intense Competition Among Key Players

Saudi Arabia's online grocery delivery market faces significant competitive pressures. Leading players such as HungerStation maintain strong market positions, but the entry of global contenders like Meituan (with its KeeTa app) and the growing popularity of domestic platforms like Mrsool are intensifying rivalry. The landscape is increasingly marked by price wars, rising marketing expenditures, and shrinking profit margins. Differentiation has become a challenge, as platforms race to offer faster delivery times, competitive pricing, and more intuitive user experiences. Balancing customer satisfaction with operational efficiency is essential for survival and success. With consumer expectations continuously rising, companies must constantly innovate while managing cost-effectiveness and service reliability.

Key Market Trends

Rise of Quick Commerce (Q-Commerce)

Quick Commerce is reshaping the online grocery delivery market in Saudi Arabia by meeting the growing consumer expectation for ultra-fast delivery—typically within 30 minutes. This trend is accelerating in urban areas like Riyadh and Jeddah, where dense populations and tech-savvy consumers demand rapid fulfillment for everyday essentials such as dairy, snacks, and produce. To meet these expectations, companies are investing in localized distribution models, including dark stores and micro-fulfillment centers. The trend is also influencing logistics strategies and technology investments to

improve last-mile efficiency. As consumers increasingly prioritize speed and reliability, Q-Commerce is becoming a core differentiator, shaping service models and intensifying competition in the sector.

Key Market Players

Nana Direct

LuLu Hypermarket

Noon AD Holdings One Person Company

Talabat

Shgardi

Zepto Marketplace Private Limited

Reliance Retail Limited

Fresh Direct, LLC

Swiggy Limited

Fiora Online Limited

Report Scope:

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

Saudi Arabia Online Grocery Delivery Market, By Product Category:

Fresh Products

Household Products

Packaged Food & Beverages

Personal Care

Others

Saudi Arabia Online Grocery Delivery Market, By Platform:

Mobile Application

Desktop Website

Saudi Arabia Online Grocery Delivery Market, By Mode of Payment:

Pre Delivery Online Payment

Card on Delivery

Cash on Delivery

Saudi Arabia Online Grocery Delivery Market, By Region:

Eastern

Western

Northern & Central

Southern

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Saudi Arabia Online Grocery Delivery Market.

Saudi Arabia Online Grocery Delivery Market By Product Category (Fresh Products, Household Products, Packaged...

Available Customizations:

Saudi Arabia Online Grocery Delivery 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).

Contents

1. INTRODUCTION

- 1.1. Product Overview
- 1.2. Key Highlights of the Report
- 1.3. Market Coverage
- 1.4. Market Segments Covered
- 1.5. Research Tenure Considered

2. RESEARCH METHODOLOGY

- 2.1. Methodology Landscape
- 2.2. Objective of the Study
- 2.3. Baseline Methodology
- 2.4. Formulation of the Scope
- 2.5. Assumptions and Limitations
- 2.6. Sources of Research
- 2.7. Approach for the Market Study
- 2.8. Methodology Followed for Calculation of Market Size & Market Shares
- 2.9. Forecasting Methodology

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions
- 3.5. Overview of Market Drivers, Challenges, and Trends

4. VOICE OF CUSTOMER

- 4.1. Brand Awareness
- 4.2. Factor Influencing Availing Decision

5. SAUDI ARABIA ONLINE GROCERY DELIVERY MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value

5.2. Market Share & Forecast

5.2.1. By Product Category (Fresh Products, Household Products, Packaged Food & Beverages, Personal Care, Others)

5.2.2. By Platform (Mobile Application, Desktop Website)

5.2.3. By Mode of Payment (Pre Delivery Online Payment, Card on Delivery, Cash on Delivery)

5.2.4. By Region

5.2.5. By Company (2024)

5.3. Market Map

6. SAUDI ARABIA FRESH PRODUCTS ONLINE GROCERY DELIVERY MARKET OUTLOOK

6.1. Market Size & Forecast

6.1.1. By Value

6.2. Market Share & Forecast

6.2.1. By Platform

6.2.2. By Mode of Payment

7. SAUDI ARABIA HOUSEHOLD PRODUCTS ONLINE GROCERY DELIVERY MARKET OUTLOOK

7.1. Market Size & Forecast

7.1.1. By Value

7.2. Market Share & Forecast

7.2.1. By Platform

7.2.2. By Mode of Payment

8. SAUDI ARABIA PACKAGED FOOD & BEVERAGES ONLINE GROCERY DELIVERY MARKET OUTLOOK

8.1. Market Size & Forecast

8.1.1. By Value

8.2. Market Share & Forecast

8.2.1. By Platform

8.2.2. By Mode of Payment

9. SAUDI ARABIA PERSONAL CARE ONLINE GROCERY DELIVERY MARKET OUTLOOK

9.1. Market Size & Forecast

9.1.1. By Value

9.2. Market Share & Forecast

9.2.1. By Platform

9.2.2. By Mode of Payment

10. MARKET DYNAMICS

10.1. Drivers

10.2. Challenges

11. MARKET TRENDS & DEVELOPMENTS

11.1. Merger & Acquisition (If Any)

11.2. Product Launches (If Any)

11.3. Recent Developments

12. PORTERS FIVE FORCES ANALYSIS

12.1. Competition in the Industry

12.2. Potential of New Entrants

12.3. Power of Suppliers

12.4. Power of Customers

12.5. Threat of Substitute Products

13. SAUDI ARABIA ECONOMIC PROFILE

14. POLICY & REGULATORY LANDSCAPE

15. COMPETITIVE LANDSCAPE

15.1. Company Profiles

15.1.1. Nana Direct

15.1.1.1. Business Overview

15.1.1.2. Company Snapshot

15.1.1.3. Products & Services

15.1.1.4. Financials (As Per Availability)

15.1.1.5. Key Market Focus & Geographical Presence

- 15.1.1.6. Recent Developments
- 15.1.1.7. Key Management Personnel
- 15.1.2. LuLu Hypermarket
- 15.1.3. Noon AD Holdings One Person Company
- 15.1.4. Talabat
- 15.1.5. Shgardi
- 15.1.6. Zepto Marketplace Private Limited
- 15.1.7. Reliance Retail Limited
- 15.1.8. Fresh Direct, LLC
- 15.1.9. Swiggy Limited
- 15.1.10. Fiora Online Limited

16. STRATEGIC RECOMMENDATIONS

17. ABOUT US & DISCLAIMER

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