

Saudi Arabia Q-Commerce Market By Product Type (Grocery, Pharmacy, Others), By Platform (App Based, Web Based), By Region, Competition Forecast & Opportunities, 2020-2030F

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Abstracts

Market Overview

The Saudi Arabia Q-Commerce Market was valued at USD 448.13 million in 2024 and is projected to reach USD 1,345.34 million by 2030, registering a CAGR of 20.17% during the forecast period. Rapid expansion in last-mile delivery infrastructure is a central growth driver, as businesses enhance logistics operations through in-house capabilities and partnerships with third-party providers. Innovations like autonomous vehicles, drones, and automated warehousing are increasingly employed to boost delivery efficiency and cost-effectiveness. The rising popularity of digital ordering platforms is also evident, with over 850,000 daily online food orders recorded in H1 2024—a figure expected to more than double by 2030. This environment reflects a dynamic shift in consumer expectations and retail logistics, positioning Saudi Arabia as a key growth hub for Q-Commerce in the region.

Key Market Drivers

Rising Consumer Expectations for Speed and Convenience

A major factor driving Q-Commerce in Saudi Arabia is the growing expectation for ultra-fast delivery. Influenced by digital convenience and on-demand lifestyles, especially among younger consumers, traditional 1–3 day delivery models are giving way to near-instant service. The success of platforms like HungerStation and Jahez has established new standards for rapid delivery across sectors beyond food, including groceries and

pharmacy goods. Urban hubs like Riyadh, Jeddah, and Dammam—where infrastructure supports high-speed logistics—are leading this shift. The behavioral changes brought on by the COVID-19 pandemic have persisted, embedding fast delivery as a norm rather than a novelty. These shifting preferences are redefining competitive benchmarks across the Saudi retail landscape.

Key Market Challenges

High Operational and Logistics Costs

Q-Commerce models face substantial operational expenses tied to delivering at speed. Building and maintaining dark stores, micro-fulfillment centers, and round-the-clock delivery fleets involve significant costs. Achieving accurate real-time inventory and close proximity to customers adds to the logistical complexity. Expanding services across Saudi Arabia's vast terrain is challenging, as less populated regions offer lower volumes and higher delivery costs. Additional cost pressures stem from rising fuel prices, driver wages, and maintenance, which together strain profitability. Many platforms operate at a loss during scaling, with only high-volume, tech-optimized operations capable of sustaining margins. Smaller operators, in particular, face difficulty remaining competitive under these conditions.

Key Market Trends

Expansion Beyond Food and Grocery

Saudi Arabia's Q-Commerce ecosystem is evolving beyond its initial focus on food and grocery delivery. Consumers increasingly demand fast delivery of diverse product categories such as health and wellness, electronics, personal care, and baby supplies. This has prompted platforms like Nana and Mistore to broaden their inventories. Pharmacy and convenience chains are also leveraging Q-Commerce platforms to provide instant access to everyday essentials. Backed by more sophisticated inventory and fulfillment technology, these services are enabling the "everything in 30 minutes" model to become a viable expectation for urban consumers. This diversification trend is reshaping the market and opening new avenues for competitive differentiation and revenue growth.

Key Market Players

Nana Direct

Jahez International Company

HungerStation

Mrsool

Rabbit Mobility Saudi Arabia

ToYou (ToYou Delivery App)

Mistore (Mihnati Store)

Sary Technologies

Jazlah App

Qareeb Delivery Services

Report Scope:

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

Saudi Arabia Q-Commerce Market, By Product Type:

Grocery

Pharmacy

Others

Saudi Arabia Q-Commerce Market, By Platform:

App Based

Web Based

Saudi Arabia Q-Commerce Market, By Region:

Western

Northern & Central

Eastern

Southern

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Saudi Arabia Q-Commerce Market.

Available Customizations:

Saudi Arabia Q-Commerce 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 Q-COMMERCE MARKET OUTLOOK

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

5.2. Market Share & Forecast

5.2.1. By Product Type (Grocery, Pharmacy, Others)

5.2.2. By Platform (App Based, Web Based)

5.2.3. By Region

5.2.4. By Company (2024)

5.3. Market Map

6. SAUDI ARABIA GROCERY MARKET OUTLOOK

6.1. Market Size & Forecast

6.1.1. By Value

6.2. Market Share & Forecast

6.2.1. By Platform

7. SAUDI ARABIA PHARMACY MARKET OUTLOOK

7.1. Market Size & Forecast

7.1.1. By Value

7.2. Market Share & Forecast

7.2.1. By Platform

8. MARKET DYNAMICS

8.1. Drivers

8.2. Challenges

9. MARKET TRENDS & DEVELOPMENTS

9.1. Merger & Acquisition (If Any)

9.2. Product Launches (If Any)

9.3. Recent Developments

10. PORTERS FIVE FORCES ANALYSIS

10.1. Competition in the Industry

10.2. Potential of New Entrants

10.3. Power of Suppliers

10.4. Power of Customers

10.5. Threat of Substitute Products

11. SAUDI ARABIA ECONOMIC PROFILE

12. POLICY & REGULATORY LANDSCAPE

13. COMPETITIVE LANDSCAPE

13.1. Company Profiles

13.1.1. Nana Direct

13.1.1.1. Business Overview

13.1.1.2. Company Snapshot

13.1.1.3. Products & Services

13.1.1.4. Financials (As Per Availability)

13.1.1.5. Key Market Focus & Geographical Presence

13.1.1.6. Recent Developments

13.1.1.7. Key Management Personnel

13.1.2. Jahez International Company

13.1.3. HungerStation

13.1.4. Mrsool

13.1.5. Rabbit Mobility Saudi Arabia

13.1.6. ToYou (ToYou Delivery App)

13.1.7. Mistore (Mihnati Store)

13.1.8. Sary Technologies

13.1.9. Jazlah App

13.1.10. Qareeb Delivery Services

14. STRATEGIC RECOMMENDATIONS

15. ABOUT US & DISCLAIMER

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