

COVER — ART DIRECTION

Full-bleed photograph. Hand pouring Saudi coffee from a dallah into a finjan at a low majlis table, golden-hour side light through a mashrabiya screen, shallow depth of field, warm haze, soft smoke, out-of-focus dates and cardamom pods in the foreground. Deep coffee-brown to charcoal grade, no green cast.

A CONSUMER INTELLIGENCE & BRAND STRATEGY REPORT

Saudi Coffee Consumer *Intelligence*

BUYER PERSONAS · BEHAVIORS · MOTIVATIONS · GROWTH
PLAYBOOK**PREPARED**

2026 Edition — Riyadh, Jeddah, Dammam & the Kingdom

SAUDI COFFEE CONSUMER INTELLIGENCE · 2026



01

Five things a coffee brand should do differently

Saudi coffee culture is not one market splitting into "traditional" and "modern." It is one high-frequency ritual that most people practice in several forms, in several places, for several different reasons — and the data says so.

01 *A daily ritual, not an occasional treat*

76% of consumers drink coffee at least once a day and 61% call it part of their routine. Retention and habit-formation matter more than one-off acquisition.

02 *The café boom is a stage, not the whole story*

Branded outlets have passed 5,130 — the largest market in the Middle East — yet only 36% of consumers name cafés or restaurants as where they mainly drink coffee. Most everyday consumption is still home and work-led.

03 *Repertoire is not identity*

50% of consumers move fluidly between Saudi coffee and other types. Segmenting by coffee type undersells the market — occasion and motivation carry the signal.

04 *Taste and quality outrank price*

Taste (79%) and quality (73%) lead purchase decisions by a wide margin over price. Sensory language should come before discount language.

05 *Home brewing is a hidden market*

68% own tools for Saudi coffee and 48% own tools for other coffee types. Beans, grinders and V60 gear sit on a real, under-served behavior.

Methodology, evidence tiers and full source list on page 26. Figures cited as facts are drawn from Alnafissa et al. (2024, *Cogent Business & Management*, n=1,055) unless otherwise sourced — see page 03 note on sample representativeness.

The Saudi Coffee Landscape

A market with genuine scale, expanding fast, and still forming its shape. National market-size estimates vary widely by research house — we show the range rather than a single invented number.

ESTIMATED NATIONAL MARKET SIZE, 2025-26

\$1.4bn – \$5bn

Estimates conflict sharply across research houses (Renub, Authority.coffee, Al-Eqtisadiah). No single figure is authoritative — treat any single hero number in this space with caution.

36M

cups of coffee
consumed daily
nationwide

5,130+

branded coffee
shop outlets —
largest market in
the Middle East

61,000

café licenses
issued (27,000
traditional)

Source: Saudi Restaurants & Cafés Association; World Coffee Portal, Project Café Middle East 2025; Saudi Ministry of Commerce, reported 2025

PLATE 03

LANDSCAPE — ART DIRECTION

Elevated wide shot of a modern Riyadh café interior at dusk, warm interior light against a cooling blue exterior, patrons visible but out of focus, specialty espresso bar in the foreground with visible steam.

CULTURE & RITUAL — ART DIRECTION

Close, intimate frame: an elder's hands pouring Saudi coffee for a guest in a majlis, dates and a dallah in soft focus foreground, warm tungsten-and-window light mix, deep shadow falloff.

SECTION 02

Culture & Ritual

Coffee in Saudi Arabia is not a beverage category first. It is a hospitality instrument — the mechanism through which a household says *you are welcome here*.

In 2022, Saudi Arabia's Ministry of Culture designated it "The Year of Saudi Coffee," and the drink long known internationally as "Arabic coffee" was formally renamed **Saudi coffee** — a deliberate act of cultural ownership tied to Vision 2030's identity agenda.

Modern café culture has its own local history: Al-Zuhour, one of Riyadh's earliest modern cafés, opened in 1954. The dallah and finjan are not nostalgia props — they remain the everyday grammar of hosting family and guests.

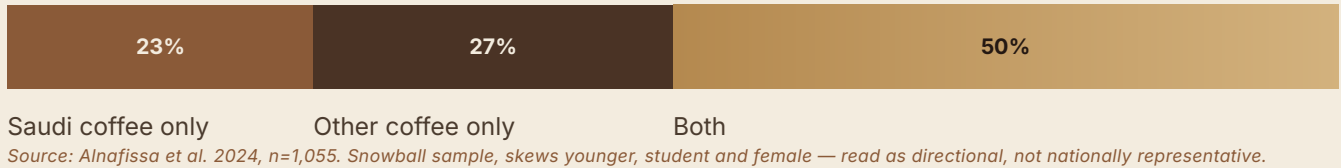
FACT

"Year of Saudi Coffee" 2022 campaign, and Saudi coffee naming, confirmed via Ministry of Culture-referencing academic literature (Alnafissa et al. 2024).

Consumption Behavior

Half of coffee consumers already move between Saudi coffee and other types depending on occasion. Repertoire is fluid — which is exactly why it should not be the axis a brand segments on.

COFFEE REPERTOIRE, IN A STUDY OF 1,055 SAUDI COFFEE CONSUMERS



76%

drink coffee at least once a day

61%

say coffee is part of their daily routine, not an occasional indulgence

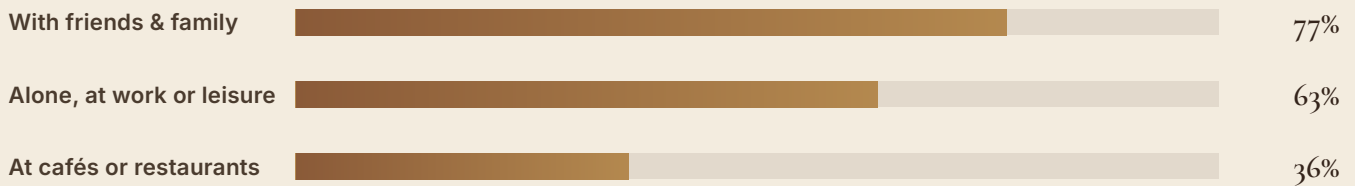
INSIGHT

The same person may drink Saudi coffee with family in the evening and order a V60 alone the next morning. One person, several coffee identities — occasion and motivation explain the switching; coffee type does not.

Occasions & Jobs-to-be-Done

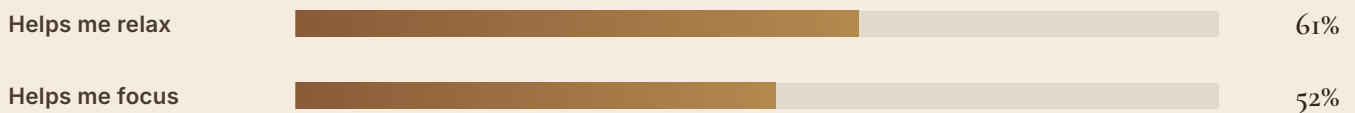
Ask a consumer *where* and *why* before asking *what*. Coffee is doing at least three distinct jobs — social glue, personal focus, and quiet relaxation — often for the same person on the same day.

WHERE CONSUMPTION HAPPENS (MULTIPLE OCCASIONS SELECTED)



Source: Alnafissa et al. 2024, n=1,055

WHAT COFFEE DOES FOR THE DRINKER



Source: Alnafissa et al. 2024, n=1,055

INSIGHT

Only 36% name cafés as a primary occasion — full detail on page 09. Products and content built only around café-going miss most of where the job actually gets done: at home, and at work.

Purchase Drivers

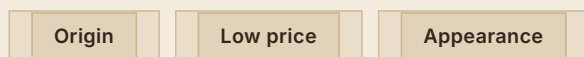
Sensory quality beats price as the reason people choose one coffee over another. Lead campaigns and packaging with taste and freshness — save the discount for the close, not the headline.

SHARE RATING EACH ATTRIBUTE IMPORTANT



Source: Alnafissa et al. 2024, n=1,055

RATED MEANINGFULLY LOWER



The study confirms these three rated below taste, quality and aroma, but does not publish exact shares for them — so no number is shown here rather than an invented one.

PURCHASE DRIVERS — ART DIRECTION

Macro, shallow-focus shot of roasted coffee beans mid-pour into a grinder hopper, warm directional light catching the oil sheen, single bean sharp in foreground.

HOME BREWING — ART DIRECTION

Overhead flat-lay, warm morning light: dallah, V60 dripper, grinder and a scatter of green and roasted beans on a wooden counter, one hand adjusting the grinder dial.

SECTION 06

Home Brewing

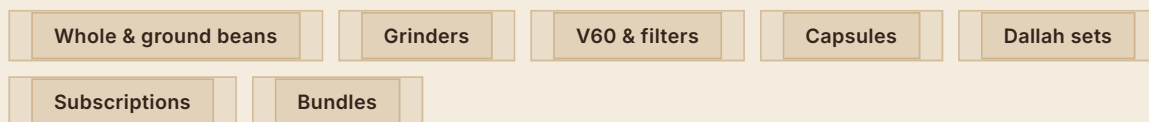
A hidden equipment market sits inside the daily ritual — and it spans both traditions.



Source: Alnafissa et al. 2024, n=1,055 — tool ownership among those who keep coffee tools

Two-thirds of consumers own dallah-and-finjan equipment for Saudi coffee at home; nearly half separately own gear for other coffee types — grinders, V60 drippers, capsule machines, moka pots.

This is not a niche behavior confined to "coffee people." It is a mainstream, dual-track equipment economy: beans, grinders, filters, capsules, and the accessories, bundles and subscriptions that serve them.



Café Culture & Social Behavior

Two things are true at once: the branded café sector is one of the fastest-growing in the Middle East, and most everyday coffee still gets made at home or drunk at a desk.

OUTLET GROWTH

5,130+

branded outlets — the largest branded coffee shop market in the Middle East, forecast to exceed 5,350 by 2027.

Source: World Coffee Portal, Project Café Middle East 2025

SELF-REPORTED PRIMARY OCCASION

At cafés or restaurants (self-reported)  36%

of consumers name cafés or restaurants as where they primarily drink coffee — a minority, against 77% who cite drinking with friends and family generally, most of it off-premise.

Source: Alnafissa et al. 2024, n=1,055

INSIGHT

Cafés are the category's shop window and its social stage — visible, fast-growing, culturally loud. But CRO and product strategy built only for café-first customers is building for a vocal minority. Treat café expansion as brand infrastructure and demand generation, not as a proxy for how the whole market actually drinks coffee.

Specialty & Expertise

Specialty coffee is growing fast in Saudi Arabia — but expertise is not evenly spread across the market. Most consumers are not chasing origin stories. A minority is, loudly, and that minority sets café trends the majority then follows more quietly at home.

THE EXPERTISE SPECTRUM



SIGNAL

Industry reporting (World Coffee Portal, trade press) points to sustained premiumisation and growth of both international and homegrown specialty roasters — directionally consistent with outlet growth on page 09, but not a consumer-survey figure.

Price Psychology

Weekly coffee budgets cluster in three bands. What predicts a consumer sitting in a higher band is more useful than the band itself.

BAND 1 Under SAR 50/week	BAND 2 SAR 50–100/week	BAND 3 SAR 100+/week
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Bands are the study's own spend categories. Exact respondent shares per band are not published in available excerpts, so none are shown here.

WHAT PREDICTS A HIGHER WEEKLY SPEND

FACT Higher consumption frequency

FACT Wider variety of coffee types consumed

FACT Purchasing at cafés or restaurants

FACT Believing coffee aids focus

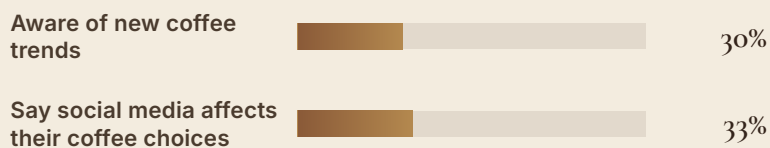
FACT Married individuals and lower-income consumers spend less; Saudi nationals spend more on coffee than non-Saudi residents, all else equal.

Source: Alnafissa et al. 2024 — ordered probit expenditure model, n=1,055

INSIGHT Spend follows engagement, not the other way round. The lever is deepening frequency and café trial, not discounting — consistent with taste and quality outranking price on page 07.

Discovery & Social Influence

A minority of consumers are discovery-led. The majority are habit-led. Both are valuable — but they need different content, different channels, and different offers.



Source: Alnafissa et al. 2024, n=1,055

DISCOVERY-LED

Trend-aware, social-media-influenced, café-curious. Smaller share, high visibility, sets the agenda for what "new" looks like.

HABIT-LED

Routine-anchored, low switching, values consistency over novelty. The larger share of daily volume.

DISCOVERY — ART DIRECTION

Close crop of a phone screen and a specialty coffee cup on a café table, soft bokeh of a busy Riyadh café behind, cool screen glow mixing with warm ambient light.

LOCAL PROVENANCE — ART DIRECTION

Wide shot of a Jazan mountainside coffee terrace at golden hour, a farmer inspecting red coffee cherries, mist over the mountains, warm backlight, shallow foreground focus on cherries.

SECTION 11

Local Saudi Coffee — An Opportunity, Not Yet a Segment

SAR 1.2bn

Saudi Coffee Company investment over ten years

5M

coffee trees targeted by 2030

300 → 2,500t

national production capacity target, from Jazan, Asir and Al-Baha

Source: Saudi Coffee Company (official), PIF subsidiary, founded 2022. Some secondary press reports cite larger figures conflating this target with a separate national program — treated here as unverified.

The supply-side story is real and well-funded: Khawlani beans, Jazan heritage, a national identity narrative actively promoted by Vision 2030.

What is not yet established is direct consumer demand for Saudi-grown coffee specifically. The closest available signal is general, not coffee-specific: over 20% of Saudi consumers say they will pay 11–20% more for local or bespoke products.

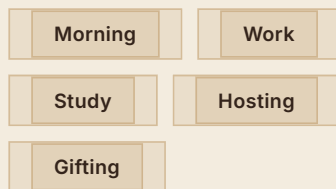
OPPORTUNITY

Treat this as a brand-building and provenance-storytelling opportunity to track, not a proven, addressable persona to build a P&L around yet.

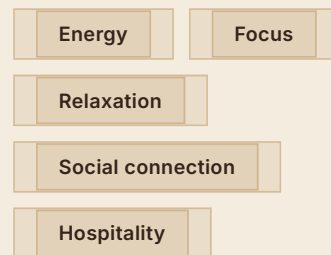
Segmentation Framework

Nine behavioral axes, not demographics. Age, gender, income and job describe a persona after it is built — they do not define it.

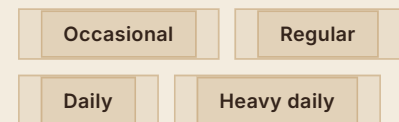
OCCASION



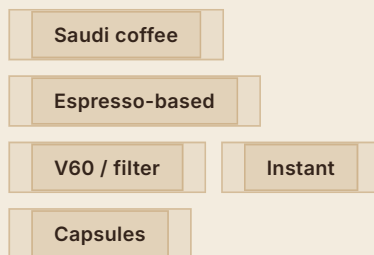
MOTIVATION



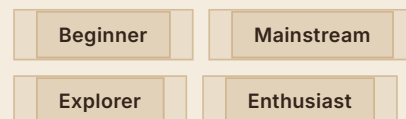
FREQUENCY



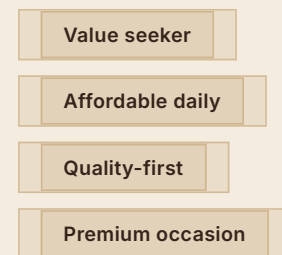
REPERTOIRE



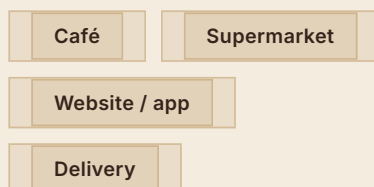
EXPERTISE



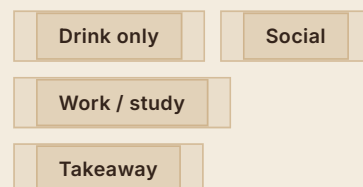
PRICE PSYCHOLOGY



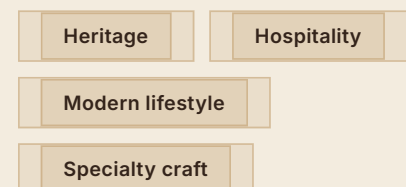
CHANNEL



CAFÉ UTILITY



IDENTITY



INSIGHT

The seven personas on the following pages are combinations across these axes, weighted toward the axes with the strongest evidence: occasion, motivation and behavior. Where evidence was thin — gifting, local provenance — we kept the finding as a growth opportunity rather than forcing a persona.

Persona Landscape Map

Seven personas, plotted across the two axes with the strongest behavioral evidence: how routine versus discovery-driven the coffee behavior is, and how social versus solitary the occasion tends to be.

SOCIAL / EXPRESSIVE OCCASION



INSIGHT

The left half of the map — Daily Ritualist, Productivity Drinker, Home Brewer, Hospitality Keeper — carries most of the category's daily volume. It is also the half most under-served by specialty marketing built for the right half.

INSIGHT

The right half — Social Café Explorer, Craft Enthusiast, Quality-Convenience Seeker — is smaller but disproportionately visible, and sets the trends the left half eventually adopts in simplified form.

Placements are directional, built from the occasion and motivation evidence on pages 05–12, not a statistical clustering output. Full profiles follow on pages 16–22.

THE DAILY RITUALIST — ART DIRECTION

Documentary-style morning routine: pouring coffee at a kitchen counter in soft window light, unstyled and real, no performance for camera.

BUYER PERSONA 01 / 07

The Daily Ritualist

Coffee as routine, not decision

CORE JTBD Give me the same good cup, without having to think about it.

BEHAVIORAL SIGNATURE



EXPERTISE LEVEL



PRICE MINDSET



PURCHASE TRIGGERS

Running low at home; the everyday restock, not a special trip.

BARRIERS

Anything that disrupts the routine — unfamiliar formats, out-of-stock staples.

DISCOVERY CHANNEL

Word of mouth and in-store visibility, not social feeds.

LOYALTY DRIVER

Reliability and availability over novelty.

EVIDENCE

76% of consumers drink coffee at least once a day and 61% call it part of their daily routine.

THE PRODUCTIVITY DRINKER — ART DIRECTION

Desk-side shot, laptop glow mixing with warm desk lamp, coffee cup mid-reach, motion blur suggesting a busy workday.

BUYER PERSONA 02 / 07

The Productivity Drinker

Coffee as fuel for the task at hand

CORE JTBD Get me through the next stretch of focused work.

BEHAVIORAL SIGNATURE



EXPERTISE LEVEL



PRICE MINDSET



PURCHASE TRIGGERS

Start of the workday, a deadline, an exam or study session.

BARRIERS

Slow preparation, inconvenient locations mid-task.

DISCOVERY CHANNEL

Workplace supply, quick-commerce delivery apps.

LOYALTY DRIVER

Speed and consistency of the effect, not the ritual.

EVIDENCE

52% of consumers agree coffee helps them focus on daily tasks.

THE SOCIAL CAFÉ EXPLORER — ART DIRECTION

Wide café interior shot at golden hour, friends mid-laugh around a table, specialty drinks in frame, shallow depth of field on the group.

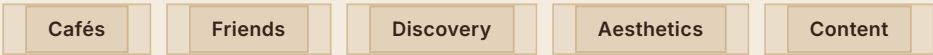
BUYER PERSONA 03 / 07

The Social Café Explorer

Coffee as social stage

CORE JTBD Give me a place — and a drink — worth being seen with.

BEHAVIORAL SIGNATURE



EXPERTISE LEVEL



PRICE MINDSET



PURCHASE TRIGGERS

New café openings, a friend's recommendation, a striking feed post.

BARRIERS

Distance, weak ambience, nothing new to try.

DISCOVERY CHANNEL

Social media and influencer or UGC content.

LOYALTY DRIVER

Novelty, ambience and shareability, not habit.

EVIDENCE

Only 36% name cafés or restaurants as their primary occasion — real, but a minority; 33% say social media affects their coffee choices.

THE CRAFT ENTHUSIAST — ART DIRECTION

Macro shot of a V60 pour-over mid-bloom, steam rising, hand holding a gooseneck kettle, single light source from the side, dark background.

BUYER PERSONA 04 / 07

The Craft Enthusiast

Coffee as a subject to master

CORE JTBD Help me understand — and get better at choosing — what's in the cup.

BEHAVIORAL SIGNATURE

Origin

Process

V60 / filter

Single-origin

Roast date

EXPERTISE LEVEL



PRICE MINDSET



PURCHASE TRIGGERS

New origin drops, roast-date freshness, new brewing gear.

BARRIERS

Inconsistent quality, no origin or process transparency.

DISCOVERY CHANNEL

Specialty roaster content, trend-aware circles.

LOYALTY DRIVER

Depth of product information and roaster reputation.

EVIDENCE

Taste (79%), quality (73%) and aroma (60%) are the leading purchase drivers; 30% describe themselves as aware of new coffee trends.

THE HOME BREWER — ART DIRECTION

Overhead flat-lay of a home brewing setup
mid-process — dallah and V60 side by side —
morning light, hands adjusting a grinder dial.

BUYER PERSONA 05 / 07

The Home Brewer

Coffee as a ritual you control

CORE JTBD Let me make something I'm proud of, at home, on my own terms.

BEHAVIORAL SIGNATURE



EXPERTISE LEVEL



PRICE MINDSET



PURCHASE TRIGGERS

Beans running low, an equipment upgrade, a free morning.

BARRIERS

Equipment cost, uncertainty about technique.

DISCOVERY CHANNEL

E-commerce, how-to content, word of mouth.

LOYALTY DRIVER

Consistent bean quality and freshness, not brand novelty.

EVIDENCE

68% own tools for Saudi coffee at home and 48% separately own tools for other coffee types — a dual-track, mainstream equipment behavior.

THE HOSPITALITY KEEPER — ART DIRECTION

Intimate majlis scene, an elder pouring Saudi coffee for a seated guest, dates on a brass tray, warm tungsten light, deep shadow, hands in sharp focus.

BUYER PERSONA 06 / 07

The Hospitality Keeper

Coffee as an act of welcome

CORE JTBD Make sure I never receive a guest empty-handed.

BEHAVIORAL SIGNATURE

Hosting

Family

Saudi coffee

Heritage

Generosity

EXPERTISE LEVEL



PRICE MINDSET



PURCHASE TRIGGERS

An upcoming gathering, Ramadan or Eid, running low on beans and cardamom.

BARRIERS

Doubt about quality consistency, brands that feel foreign or unfamiliar.

DISCOVERY CHANNEL

Family and social circle, trusted local brands in-store.

LOYALTY DRIVER

Consistency, trust and cultural authenticity.

EVIDENCE

Saudi-coffee-only consumers are significantly more likely to drink socially and less likely to say coffee aids focus or to be trend-aware — a distinct, heritage-anchored profile.

THE QUALITY-CONVENIENCE SEEKER
— ART DIRECTION

Clean, bright kitchen counter shot: a capsule machine mid-brew, single cup, minimal styling, soft daylight, no clutter.

BUYER PERSONA 07 / 07

The Quality-Convenience Seeker

Coffee that doesn't ask for effort

CORE JTBD Give me good coffee without making it complicated.

BEHAVIORAL SIGNATURE

Anywhere

Capsules & pods

Supermarket

Simplicity

Reliability

EXPERTISE LEVEL



PRICE MINDSET



PURCHASE TRIGGERS

Supermarket restock, a quick-commerce delivery prompt.

BARRIERS

Jargon, long brew times, too many decisions.

DISCOVERY CHANNEL

Supermarket shelf, quick-commerce apps.

LOYALTY DRIVER

Simplicity and predictable results, not novelty.

EVIDENCE

Taste and quality outrank price even in the broader sample; capsule and pod e-commerce is flagged by multiple market reports as a fast-growing convenience channel.

Customer Journey

Seven stages, each with its own question, its own friction, and its own channel — the same structure whichever persona is moving through it.

01	Awareness	<i>"Does quality coffee even matter to me?"</i>	FRICTION Seen as a commodity, not a differentiated choice CHANNEL Café visibility, word of mouth
02	Discovery	<i>"What's actually out there?"</i>	FRICTION Fragmented brands; unclear where Saudi coffee fits next to specialty CHANNEL Social media, café trial, in-store
03	Evaluation	<i>"Is this worth switching for?"</i>	FRICTION Uncertainty on taste, freshness and origin CHANNEL Reviews, tasting, trusted recommendation
04	Purchase	<i>"Where do I get this, easily?"</i>	FRICTION Channel mismatch — café, online and supermarket rarely aligned CHANNEL Café, supermarket, e-commerce, quick-commerce
05	Consumption	<i>"Does this fit my day?"</i>	FRICTION Too complex for a daily-use occasion CHANNEL Home, work, café
06	Repeat	<i>"Is this still my reliable choice?"</i>	FRICTION Stockouts and inconsistency break the habit CHANNEL Subscription, reorder prompts, loyalty
07	Advocacy	<i>"Do I tell anyone about this?"</i>	FRICTION Nothing distinctive enough to be worth sharing CHANNEL Gifting, hosting occasions, social sharing

Content, Copy & Visual Direction

Seven personas need seven different creative briefs, not one brand voice repeated seven times.

PERSONA	CONTENT PILLAR	TONE & HOOK	VISUAL DIRECTION
Daily Ritualist	Routine & reliability — “your coffee, every day”	Warm, plain, reassuring	Home mornings, natural light, unstyled
Productivity Drinker	Focus tips, quick-brew formats	Brisk, functional	Desks, motion, workday energy
Social Café Explorer	Café discovery, new-drink launches, UGC	Playful, aspirational	Café interiors, friend groups, golden hour
Craft Enthusiast	Origin stories, brew guides, tasting notes	Expert, precise	Macro brewing shots, single-origin labeling
Home Brewer	How-to tutorials, equipment reviews	Instructional, encouraging	Flat-lays, hands-on process
Hospitality Keeper	Hosting guides, heritage storytelling	Respectful, warm, heritage-forward	Majlis, dallah & finjan, family
Quality-Convenience Seeker	“Good coffee, made easy”	Plain-spoken, reassuring	Clean kitchen, minimal styling

INSIGHT

Craft Enthusiast and Home Brewer content should never be pointed at Quality-Convenience Seeker or Daily Ritualist audiences — origin and process detail is a barrier, not a hook, for the two largest-frequency, lowest-expertise segments.

Media, CRO & Growth Opportunities

PERSONA	MEDIA ANGLE	CRO PRIORITY
Daily Ritualist	CRM & retention, replenishment reminders	Quick reorder, subscribe & save
Productivity Drinker	Workplace & commute targeting, morning daypart	Fast checkout, snack bundling
Social Café Explorer	Social & influencer, location-based	Café locator, rich PDP imagery, social proof
Craft Enthusiast	Organic content, specialty community	Origin & process detail on PDP, brew-match filter
Home Brewer	Search intent, how-to video	Starter bundles, equipment cross-sell
Hospitality Keeper	Family & community, seasonal (Ramadan / Eid)	Gift-ready packaging, family pack sizes
Quality-Convenience Seeker	Broad reach, supermarket & quick-commerce	Simplified taste navigation, one-tap reorder

GROWTH OPPORTUNITIES, PRIORITIZED BY EVIDENCE STRENGTH

FACT

Home brewing equipment & bean subscriptions

68% own Saudi-coffee tools, 48% own tools for other types

INSIGHT

Beginner-friendly specialty entry points

Expertise spectrum skews mainstream — most consumers are not trend-aware

SIGNAL

Quick-commerce & convenience formats (pods, capsules)

Multiple market reports flag rapid online/subscription growth

SIGNAL

Ramadan & Eid gifting bundles, corporate gifting

Large general gifting economy (SAR 65bn Ramadan–Eid spend); coffee named a category staple by gifting vendors — not a direct consumer survey figure

OPPORTUNITY

Local Saudi-grown storytelling & provenance

Strong supply-side investment (SCC); consumer demand evidence still thin

INSIGHT

Loyalty & subscription anchored on daily-ritual frequency

76% daily consumption is the strongest, most reliable behavior in the dataset

Methodology & Sources

EVIDENCE TIERS USED THROUGHOUT

FACT

Directly supported by a credible, cited source

INSIGHT

Interpretation built on multiple facts or signals

SIGNAL

Directional evidence, not nationally representative

OPPORTUNITY

Real strategic potential; consumer-demand evidence not yet established

KEY CAVEATS

The Alnafissa et al. (2024) study (n=1,055) used snowball sampling and overrepresents younger, student and female respondents. Its figures are reported here as "in a study of 1,055 Saudi coffee consumers," never as national population shares.

National market-size estimates conflict by more than 3x across research houses. This report shows a range rather than a single figure.

Saudi Coffee Company's own site states a 300→2,500 tonne production target; some secondary press cites a larger 800→10,000 tonne figure that appears to conflate SCC's target with a separate national program. This report uses SCC's own published figure.

Gift & Occasion and Local Provenance behaviors are treated as growth opportunities, not personas — evidence for both is real but indirect, not first-party coffee-consumer data.

SOURCES

Alnafissa, M., Alagsam, F., Almojel, S., Alamri, Y., Algarini, A., & Ismail, A. (2024). Segmentation and spending patterns in the Saudi Arabian coffee market. *Cogent Business & Management*, 11(1). King Saud University, n=1,055.

Saudi Coffee Company (official corporate site) — investment, tree-planting and production capacity targets.

World Coffee Portal, Project Café Middle East 2025 — branded outlet counts and forecasts.

Saudi Ministry of Commerce — café business license figures, reported via press mid-2025.

Saudi Restaurants & Cafés Association — daily cup consumption estimate, reported via Gulf News and Qahwa World.

PwC, Global Consumer Insights Survey Pulse 6 — KSA perspective — local/bespoke product price-premium willingness.

Market-size research (conflicting, shown as a range): Renub Research, Authority.coffee, Al-Eqtisadiyah / Qahwa World reporting.

Ramadan & Eid gifting-economy figures: multiple 2026 marketing and retail industry reports (YouGov-sourced statistics via secondary publications).