The Specialty Coffee Market in Saudi Arabia: Opportunities and Indicators

Investors and managers assessing entry into or expansion within Saudi Arabia's coffee and specialty café market

Contents

Executive summary · 3

Key indicators dashboard · 3

Market size and growth · 4

Where the coffee comes from · 5

The rise of roasted coffee · 8

Khawlani coffee in Jazan · 10

Consumer behaviour · 12

The spread of specialty cafés and roasteries · 13

Prices and costs · 15

Opportunities and challenges · 16

Practical recommendations · 17

Entry plan · 18

1. Executive summary

Saudi Arabia's coffee imports have expanded strongly over the decade. Import value rose from USD 193.2 million in 2014 to USD 606 million in 2024, and import quantity rose from 49.4 to 111.7 thousand tonnes [F1]. Imports per person grew from 1.75 kg to 3.16 kg over the same years [F1]. These are import-based measures: they show demand entering the country, not measured consumption.

Roasted coffee is the segment most relevant to a new entrant. Its import value grew from USD 67.5 million in 2019 to USD 184.8 million in 2024 [F1], faster than total import value over the same period. Green supply is concentrated: Ethiopia supplied USD 303.3 million, half of 2024 import value [F1]. That dependence is both a sourcing risk and the basis of the origin story that a roaster can build on.

Opportunities and risks

- Roasted and specialty supply: a growing roasted import base offers room for a roaster that buys green coffee and sells under its own brand [F1].
- Khawlani origin story: a local provenance narrative can differentiate a roasted product, but its commercial value is not measured in the available sources and should be tested with buyers before it is priced into the plan.
- Café formats: a small footprint can carry the roasted product and origin story directly to consumers, which we see as the natural second step once roasting demand is proven.
- Price volatility: the average import price per kg peaked at USD 5.84 in 2022 and was USD 5.43 in 2024 [F1]; the ICO Composite Indicator Price moved from 182.04 US cents/lb in February 2024 to 335.76 US cents/lb in April 2025 [W27][W28].
- Unmeasured specialty segment: the workbook has no specialty line, so the specialty market must be sized from adjacent sources before any capacity commitment [F1].
- Import dependence: one origin supplies half of import value [F1], which exposes margins to a single supply chain.

Recommendation

We recommend a phased, asset-light entry through roasting, with a small café footprint added only after roasting demand is confirmed. The first phase should secure green supply and a roasting arrangement. The café phase should follow only when the indicators hold: roasted import value keeps rising from the 2024 level of USD 184.8 million [F1], imports per person continue to rise from 3.16 kg [F1], and the average import price per kg stays within a range that protects margin rather than moving sharply from USD 5.43 [F1]. If prices spike or roasted imports stall, we recommend pausing expansion and holding the roasting operation at its current scale.

2. Key indicators dashboard

The table sets out four headline indicators from the national import workbook for three benchmark years [F1]. Values are shown as recorded, so the reader can compare the starting point, the pre-2020 position and the latest year directly.

Table 1

Indicator	2014	2019	2024
Import value (USD million)	193.20	251.20	606
Quantity (thousand tonnes)	49.40	67.30	111.70
Average import price per kg (USD)	3.91	3.73	5.43
Imports per person (kg)	1.75	2.24	3.16

How to read each indicator

- Import value is the customs value of coffee imports in USD million, a measure of spending on imported coffee [F1].
- Quantity is the tonnage imported, in thousand tonnes, and shows physical volume independent of price [F1].
- Average import price per kg is import value divided by quantity [F1]. It is a unit value, so it reflects both price levels and the mix of products imported, not a quoted market price.
- Imports per person is quantity divided by population, in kg per resident [F1]. It shows import-based demand per head.

Data limits

Three limits apply to every figure in this report. Imports per person measure import-based demand, not measured consumption, because imports include stocks and re-exports [F1]. The customs coffee heading has no separate line for specialty coffee, so any specialty market size must be estimated from adjacent sources and labelled as an estimate [F1]. Origin data covers 2023 and 2024 only [F1].

3. Market size and growth

Import value since 2014

Saudi coffee imports rose from USD 193.2 million in 2014 to USD 606 million in 2024, an increase of 213.7% [C2]. The path was uneven. Official cross-checks from the General Authority for Statistics, ZATCA and Argaam were not found in the retrieved evidence, so the series rests on the workbook alone [F1].

The 2016 dip was mainly volume-driven. Quantity fell from 57.7 to 49.3 thousand tonnes.

Price and volume effects

The volume effect is the change in quantity multiplied by the prior-year price; the price effect is the change in price multiplied by the current-year quantity. On this basis the 2022 step-up was almost entirely price-driven. Quantity was flat at 80.3 and 79.9 thousand tonnes, while the average price rose from USD 4.39 to USD 5.84 per kg [F1].

Growth in 2024 was volume-led. Value rose USD 116.2 million, or 23.7% [C2], as quantity increased from 85.7 to 111.7 thousand tonnes while the average price eased from USD 5.72 to USD 5.43 per kg [F1]. The table summarises the three episodes.

We recommend that revenue and margin plans test price and volume assumptions separately, since the two most recent step-ups came from different sources.

Specialty market size as a labelled estimate

The workbook has no specialty line, so the segment cannot be measured from customs data [F1]. The only specialty-specific figure retrieved is a vendor estimate of USD 0.95 billion for 2025, with no disclosed method [W25]. It is indicative and unverified, not an official statistic, and the evidence supports no range or upper bound for specialty size.

Their bases are unstated and they do not reconcile with the USD 606 million import value [F1], so they are shown only as a scale reference for total demand.

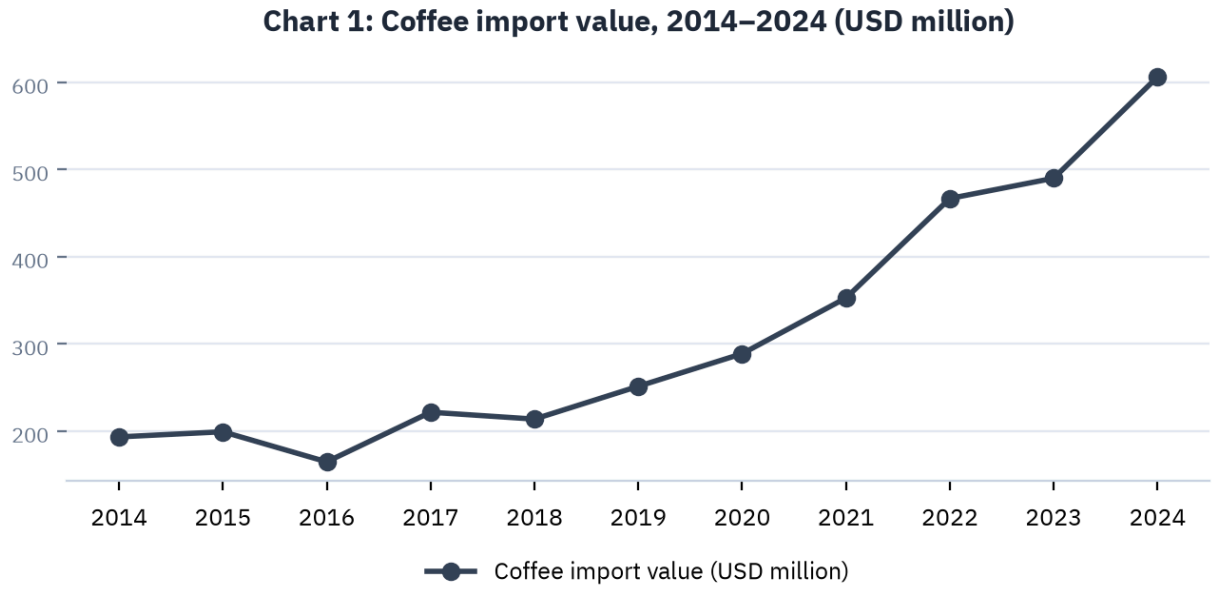


Figure 1 — Chart 1: Coffee import value, 2014–2024 (USD million) — saudi-coffee-data-2014-2024.xlsx / Annual imports

4. Where the coffee comes from

Ethiopia is now the dominant origin of Saudi coffee imports. Its 2024 import value reached USD 303.3 million, a 50% share of value, from 68.39 thousand tonnes [F1][F1][F1]. In 2023 it supplied USD 236.2 million, or 48.2%, from 49.51 thousand tonnes [F1][F1]. The share rose modestly, but volume rose much more, and the 2024 Ethiopian quantity accounts for most of the 111.7 thousand tonnes imported in 2024 [F1][F1].

A reshuffled top ten

Behind Ethiopia, the 2024 ranking is led by Brazil (USD 51.0 million, 8.4%), Colombia (USD 44.4 million, 7.3%), Canada (USD 26.9 million, 4.4%), the United States (USD 19.5 million, 3.2%) and India (USD 19.0 million, 3.1%), with Switzerland, Italy, the Netherlands and France following [F1][F1]. The 2023 list differed. The Netherlands ranked third with USD 24.0 million (4.9%) and fell to 2.4% in 2024, while Yemen, at USD 12.5 million (2.5%), was in the 2023 top ten and is absent in 2024 [F1][F1]. Table 1 sets both top tens side by side.

Table 1: Import value and share by country of origin, 2023 and 2024. Rows cover the top ten in either year, plus other countries [F1].

Table 2

Origin	2023 value (USD m)	2023 share (%)	2024 value (USD m)	2024 share (%)
Ethiopia	236.2	48.2	303.3	50.0
Brazil	31.3	6.4	51.0	8.4
Colombia	23.3	4.8	44.4	7.3
Canada	16.6	3.4	26.9	4.4
United States	18.4	3.7	19.5	3.2
India	21.2	4.3	19.0	3.1
Switzerland	14.3	2.9	16.7	2.8
Italy	18.2	3.7	16.4	2.7
Netherlands	24.0	4.9	14.4	2.4
France	Outside top ten	–	9.6	1.6
Yemen	12.5	2.5	Outside top ten	–
Other countries	73.8	15.1	84.9	14.0

What concentration means for supply security

When one origin supplies half of import value, a disruption to its harvests, export logistics or pricing reaches a large part of Saudi supply at once. The next origin, Brazil, supplied 8.4% in 2024 [F1][F1]. No other origin in the workbook approaches Ethiopia's scale, so substitution is not simple. This indicates that buyers relying on Ethiopian green coffee depend on one exporting system for their core blends. The analysis rests on the workbook alone; ICO statistics and wire coverage of Ethiopian exports were not retrieved, so the reasons behind the Ethiopian share cannot yet be verified [F1].

We recommend a two-layer sourcing strategy. Keep Ethiopia as the core volume origin, and qualify a second origin with a different growing and export base, such as Brazil or Colombia, the next two largest suppliers [F1]. Specialty buyers should also test processed or roasted inputs. Ethiopia is reported to be expanding roasting capacity, but this rests on a market-research summary not verified against an official publication [W29][W29].

From farm to cup

Coffee reaches a Saudi café through four stages, and each handover is a point where origin, quality and timing can change:

1. Farm: cherries are picked and processed into green coffee.
2. Export: green coffee is shipped from the origin country to importers.
3. Roaster: green beans are roasted into finished product.
4. Café: roasted coffee is brewed and served to the customer.

We recommend that buyers map their supply against these four stages before choosing an origin mix, and record which stage each contract covers.

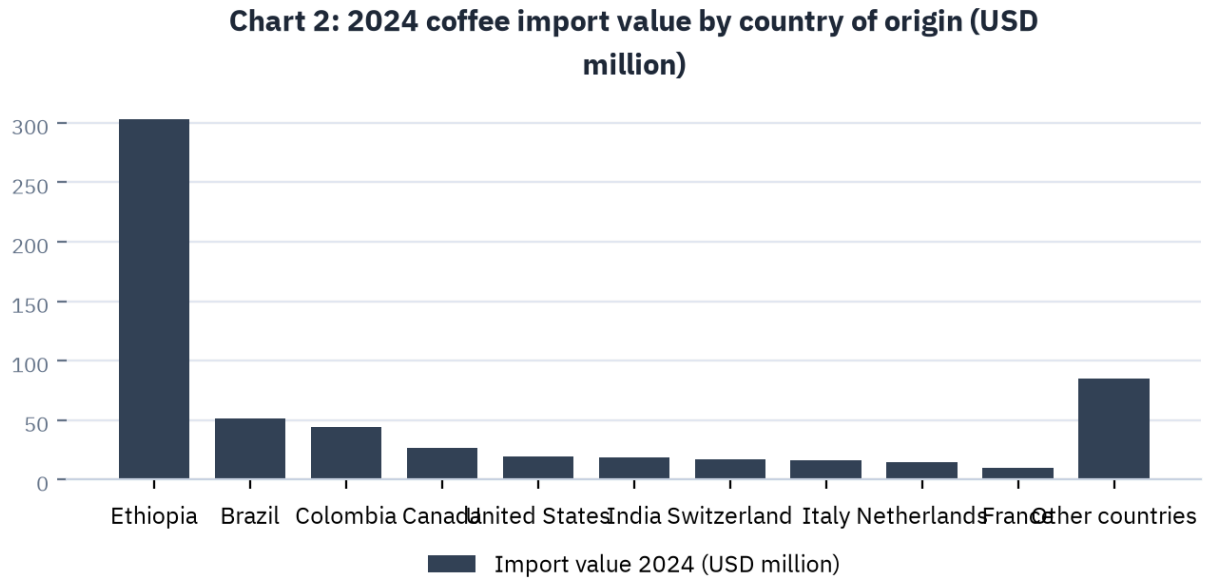


Figure 2 — Chart 2: 2024 coffee import value by country of origin (USD million) — saudi-coffee-data-2014-2024.xlsx / Origins 2024



Figure 3 — A highland farm at dawn: a basket of ripe red cherries in the foreground, green beans drying on a raised bed behind, and roasted beans beside a cup of coffee at the edge of the same table, linking the farm to the cup. — Generated illustration

5. The rise of roasted coffee

Roasted coffee imports have grown alongside green beans. Green coffee import value rose from USD 145.9 million in 2019 to USD 405 million in 2024, and roasted coffee rose from USD 67.5 million to USD 184.8 million over the same years [F1]. The finished-product category is therefore expanding with the raw-bean category rather than being displaced by it.

Roasted share holds at about a third

Roasted share of the two categories moved from 31.6% in 2019 to 31.3% in 2024, with a low of 27.5% in 2021 and a high of 33.8% in 2020 [F1]. The share is stable rather than rising, which indicates that roasted imports are tracking green imports year by year.

Green and roasted imports, USD million, 2019 to 2024 [F1]:

Table 3

Year	Green (USD million)	Roasted (USD million)	Roasted share (%)
2019	145.90	67.50	31.6%
2020	176.60	90.10	33.8%
2021	249.60	94.50	27.5%
2022	329.70	128.70	28.1%
2023	335.30	142.80	29.9%
2024	405	184.80	31.3%

What roasted growth means for a local roaster

Roasted imports are finished product that Saudi buyers already purchase, and the 2024 pool of USD 184.8 million is a demand signal that local roasting could address [F1]. Because roasted value sits above green value in the supply chain, it also suggests a margin layer above the green import: a roaster that buys green beans and sells roasted coffee captures value that the import data records as a separate, growing category [F1]. We recommend that a local roaster size its plans against the roasted pool and the green volume it would buy, rather than against the total import line, because the workbook's categories do not reconcile to total import value [F1].

Local capacity and the regulatory route

A vendor estimate values the Saudi coffee roaster market at USD 58.4 million in 2026, rising to USD 105.57 million by 2035 at a 6.80% CAGR, and reports that specialty cafés in Riyadh and Jeddah are expanding in-house roasting [W22]. This estimate is not verified and should be read as directional. Ethiopia's planned roasting facilities in Jimma and Guji could also change what reaches Saudi Arabia, but that report is not verified against an official Ethiopian publication [W29].

Every prepackaged food product, imported or local, must carry Arabic labelling under GSO 9:2022, showing the product name, packer, country of origin, ingredients, end-use instructions where applicable and shelf life [W18]. Registration requires SFDA establishment and product registration on the Ghad platform, with shipments cleared on Fasah [W17]. The retrieved evidence does not yet cover private-label brands, so a private-label model should be tested with buyers before it is adopted.

Recommended sequence

1. Register the establishment with the SFDA on Ghad before importing green beans or roasted product.
2. Register each roasted product and prepare its Arabic label to meet GSO 9:2022.

3. Confirm the labelling and registration steps against the current SFDA text, since no SFDA primary publication has yet been checked [W18] [W15] [W17].
4. Size roasting capacity against the roasted import pool and the green volume it would require.

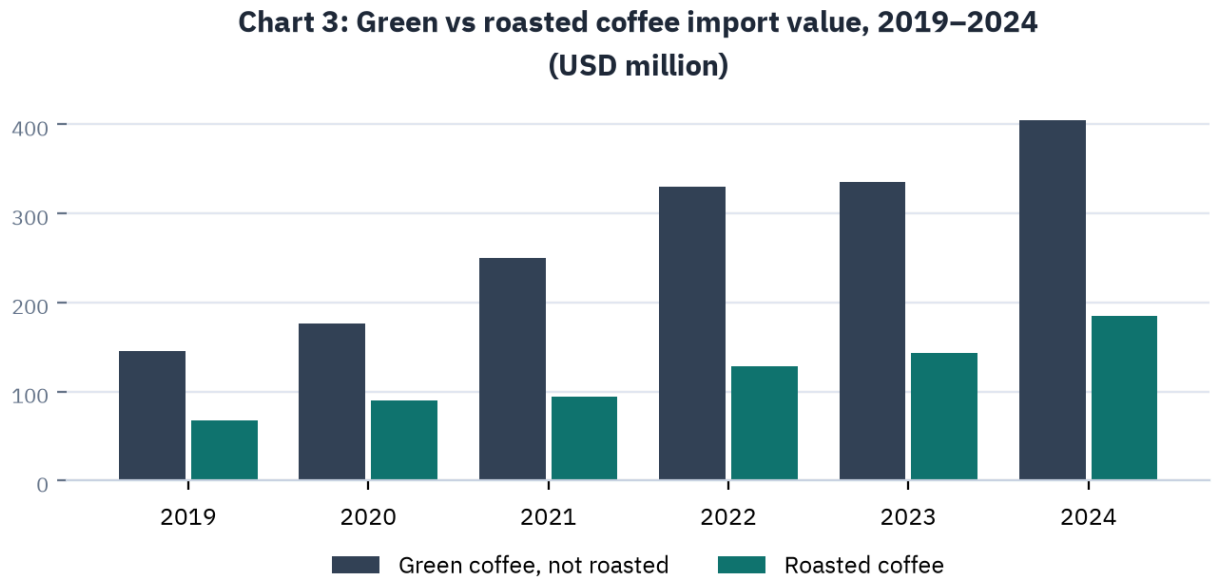


Figure 4 — Chart 3: Green vs roasted coffee import value, 2019–2024 (USD million) — saudi-coffee-data-2014-2024.xlsx / Green and roasted



Figure 5 — A drum roaster turns coffee beans over a warm flame in a small local roastery, while a tray of freshly roasted beans cools beside it. — Generated illustration

6. Khawlani coffee in Jazan

Origin and growing zone

Khawlani coffee takes its name from the Khawlan mountains, which run from south-western Saudi Arabia into north-western Yemen. Jazan province and Saada governorate are the main growing regions [W11]. Saudi coffee is concentrated in the mountainous highlands of Aseer, al-Bahah and Jazan, and Khawlani is described as one of the most expensive coffees in the world [W13]. A 2023 academic study describes Jazan's fertile valleys and varied terrain as offering a profitable opportunity for coffee [W14].

Cultivation on the Jazan terraces follows the slopes of these highlands. The reviewed sources do not describe terrace construction or plot sizes, so this report does not quantify them. As a regional reference, the elevation record for a Jazan highland point at Fayfa is 895 m above sea level [D31]. This is a regional figure, not a measurement of any farm. No usable climate-history series for Jazan was found, so this report makes no rainfall or temperature claims for the growing zone [D31].

Smallholder structure and current supply

The sources describe Khawlani as grown on special coffee farms in the highlands [W13]. They do not give the number of growers or holding sizes. The official workbook records coffee only by importing country of origin, with no Khawlani line [F1]. Khawlani volume therefore cannot be sized from the evidence. We expect the sector to be made up of small, family-run holdings, but this is a working assumption to verify with suppliers, not a finding. Until supplier data are obtained, current supply should be treated as small and unverified [F1].

Origin story and premium potential

The Ministry of Environment, Water and Agriculture said it was establishing a geographical indication for Jizan coffee to help farmers [W12]. The announcement is undated in the excerpt reviewed, and its current status is not confirmed [W12]. If completed, a protected name would give buyers a verifiable origin claim, which is the basis for a premium. That suggests a premium is plausible, but it should not be assumed in pricing until the status is confirmed.

Jazan Development Authority publications, Ministry production data and national press features were not retrieved, so the origin story rests on encyclopaedic and academic sources [W11] [W13] [W14]. We recommend that a commercial buyer confirm the geographical-indication status with the ministry and request supplier records of volume and lot origin before pricing Khawlani against standard imported coffee.



Figure 6 — A smallholder coffee plot on stepped dry-stone terraces in the Jazan highlands, with coffee shrubs planted in rows along the terrace walls and mountain slopes rising behind. — Generated illustration

7. Consumer behaviour

Import data is the most direct measure of consumer demand in the workbook. Coffee imports per person rose from 1.75 kg in 2014 to 3.16 kg in 2024 [F1], and import value per person rose from USD 6.8 to USD 17.2 over the same period [F1]. The path was uneven. Imports per person fell to 1.59 kg in 2016, reached 2.61 kg in 2021, eased to 2.48 kg in 2022, and then set the series high in 2024 [F1].

Import-based demand per person

Population grew from 28,309,273 in 2014 to 35,300,280 in 2024, a change of about 24.7% [F1] [C6]. Volume per resident therefore rose far more than population alone, which points to growth in coffee consumed per person as well as in the number of buyers. These figures measure imports, which can include stocks and re-exports, so they indicate demand more than measured domestic consumption [F1].

Chart 4 plots the annual per-person import series from the Per capita sheet, 2014 to 2024 [F1].

Consumer habits behind the trend

No General Authority for Statistics household survey or ICO consumption report for Saudi Arabia was retrieved, so the habit evidence below is qualitative and indicates direction rather than measurement [F1]. The strongest signal comes from the trade. The chief executive of Black Knight, a Riyadh specialty roaster, reports clear growth over the past decade in cafés and roasteries and a significant expansion in

the home-barista sector. This is an interview-based observation, not a survey [W24]. Home brewing of this kind is consistent with a shift toward filter and specialty methods, although the sources do not quantify that shift.

Vendor research links demand to a café culture among younger generations and to the Saudi Coffee Initiative under Vision 2030 [W8]. That attribution is not measured and should be treated as a hypothesis. The spread of cafés described in trade reporting [W24] is consistent with café-led socialising, but no source measures visit frequency or spend per visit.

Implications for entry decisions

The rising per-person imports suggest a growing base of coffee buyers and wider appetite for specialty formats, and the demand case does not rest on population growth alone. We recommend that a prospective entrant first obtain household survey evidence to confirm the trend, then track the per-person import series against café openings before committing to a format.

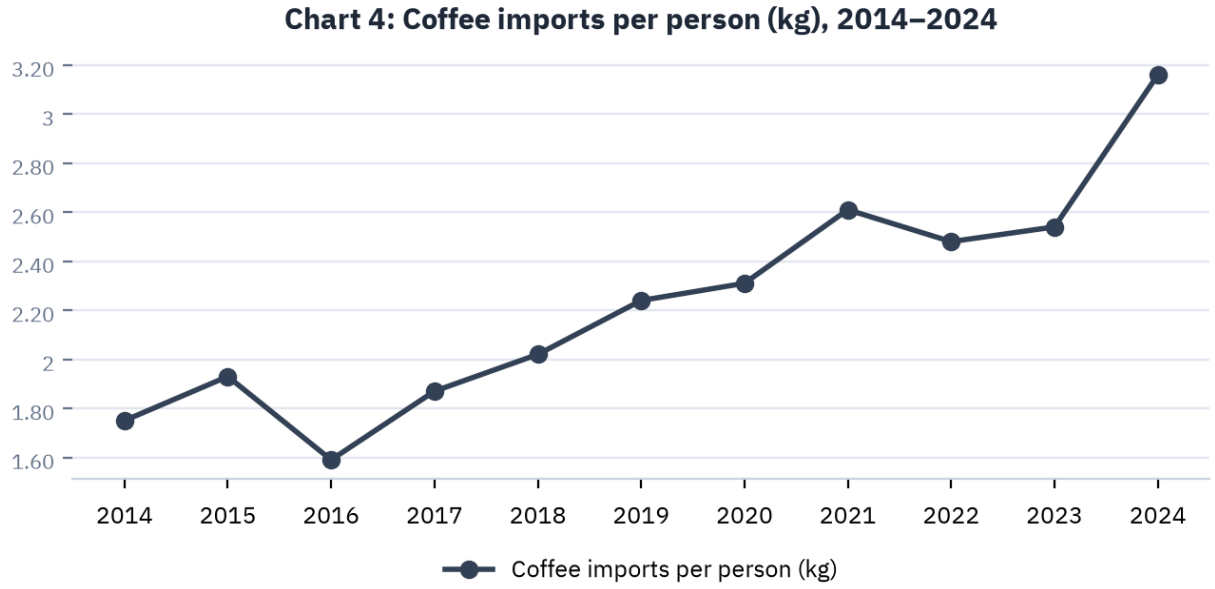


Figure 7 — Chart 4: Coffee imports per person (kg), 2014–2024 — saudi-coffee-data-2014-2024.xlsx / Per capita

8. The spread of specialty cafés and roasteries

Specialty coffee retail in Saudi Arabia takes three forms, and each carries different economics. Independent specialty cafés are owner-run venues, usually operating one or a few sites. Multi-branch chains run many outlets under one brand. Roaster-cafés combine in-house roasting with a retail counter. The clearest example of scale is Barn's Café, which a trade article reports grew from around 130 outlets in 2018 to over 800, making it the largest coffee chain in the Kingdom after Dunkin' [W24]. That figure is a press count and has not been independently verified [W24]. Chains of this size show that the café format can scale well beyond the independent model.

Roasters are also moving into retail. Khatwat Jamal began as a community-focused roastery and has since expanded into a café chain with locations across Saudi Arabia and, more recently, in Dubai and Qatar [W23][W23]. This roastery-to-chain path suggests that a strong roasting identity can support multi-site growth. A vendor study adds that specialty cafés in Riyadh and Jeddah are expanding in-house roasting [W22][W22]. That is a signal rather than a verified trend.

Where the cafés are concentrated

Vendor research places specialty concepts mainly in Riyadh, including the Al-Malqa district, and in Jeddah [W22][W22]. The Riyadh roaster CEO quoted in trade press describes clear growth over the past decade in both cafés and roasteries [W24][W24]. No source retrieved covers Dammam, so this section cannot assess its position. Official café or roastery counts were not retrieved, so the spread is described qualitatively and no city-level count is given [W24] [W8].

Format economics

The sources do not quantify format economics, so the comparison below is qualitative. A drive-through format depends on passing traffic and a short, fast menu, which suggests a lean operation with few seats. A third-place café earns from dwell time, seating and the social use of space, which suggests a larger floor area and more staff per cup. Roaster-cafés carry roasting equipment and green coffee stock in addition to the café's own costs, but may gain control over quality and margin. It follows that format choice should rest on the site, the catchment and the operator's ability to carry the chosen cost base. We recommend that operators test a format at one site before committing to a multi-branch model.

Tourism and policy backdrop

Tourism growth widens the customer base for cafés in leisure districts. Saudi Arabia welcomed about 116 million tourists in 2024, six percent more than in 2023, and current plans target 150 million visitors [W10][W10]. The sources retrieved do not link individual café openings to Vision 2030 entertainment policy. Ministry of Investment and Vision 2030 entertainment documents were not retrieved, so the policy link here rests on trade reporting only.



Figure 8 — Interior of a specialty café showing a pour-over bar with dripper cones and a gooseneck kettle in the foreground, a chrome espresso machine behind the counter, and mixed seating of small tables and armchairs under arched windows. — Generated illustration

9. Prices and costs

The average import price per kg fell from USD 3.91 in 2014 to USD 3.34 in 2016, then rose to USD 4.39 in 2021 and peaked at USD 5.84 in 2022 [F1]. It eased to USD 5.72 in 2023 and USD 5.43 in 2024 [F1]. Prices in 2024 therefore remained well above the 2014 level, while quantity rose from 49.4 thousand tonnes in 2014 to 111.7 thousand tonnes in 2024 [F1].

Green coffee cycle and roasted value

Import prices follow the green coffee cycle. The ICO Composite Indicator Price averaged 182.04 US cents/lb in February 2024, a 17-month high [W27]. It was 250.56 US cents/lb in October 2024 [W26] and 335.76 US cents/lb in April 2025 [W28]. These reports describe price direction rather than Saudi import prices, but a 17-month high in February 2024 suggests that green prices were elevated through 2022 and 2023, consistent with the import peak in 2022 [F1].

Roasted coffee value rose from USD 67.5 million in 2019 to USD 184.8 million in 2024, and its share of green and roasted value stayed between 27.5% and 33.8% [F1]. The data give no roasted quantity, so roasted value per kg cannot be derived. This means the rise in roasted value tracks the green price cycle, but the per-kg change is not measured here [F1][F1].

Origin mix

Ethiopia supplied 50% of 2024 import value, USD 303.3 million from 68.39 thousand tonnes, up from 48.2% in 2023 [F1]. Brazil (8.4%) and Colombia (7.3%) followed [F1]. Because Ethiopia dominates both value and volume, it anchors the national average price. Origin unit values differ and should be calculated and checked before any comparison is relied on [F1]. This suggests that a roaster sourcing from other origins may face a different price base from the national average.

Cost categories for roasters and cafés

Import prices capture only the green coffee input. The table compares how each further cost category falls on a roaster and on a café. It describes the direction of exposure, not amounts.

Table 4

Cost category	Main driver	Roaster exposure	Café exposure
Green coffee	Green price cycle and origin mix	Direct and largest input	Indirect, through roasted purchases
Freight	Shipping and import handling	Direct on imported green coffee	Embedded in bought-in roasted coffee
Roasting energy	Roasting equipment and power use	Direct, if roasting in-house	Only if the café roasts on site
Packaging	Bags, valves and labels	Direct per unit sold	Direct for takeaway and retail bags
Rent	Site location and size	Depends on production space	Fixed and location-driven
Labour	Roasting and barista skills	Production and sales staff	Front-of-house staff, a recurring cost

Saudi coffee imports have grown sharply since 2014, and that growth favours a roasting business. The four opportunities and five challenges below are set out qualitatively. Each rests on a measured indicator or a sourced finding, and none is weighted.

10. Opportunities and challenges

What the comparison implies

The demand indicators favour a Saudi-based roasted offer over green trading. Origin diversification and compliance are the conditions for that offer to work. The two weakest points are the unmeasured specialty segment and the unmeasured Khawlani volume. We recommend closing both through supplier and buyer checks before sizing any entry plan.

The five recommendations below are listed in the order an entrant should act on them. Capital needs are not estimated here, because the workbook has no cost data [F1]; confirm them through supplier quotes and local feasibility work before committing funds.

11. Practical recommendations

Build the green base on Ethiopia and Brazil, and add a small Khawlani allocation. Ethiopia supplied 50% of 2024 import value and Brazil 8.4% [F1]. Ethiopia's share rose from 48.2% in 2023 [F1], so a second origin reduces dependence on one supplier base. Khawlani volume is not measured in the workbook [F1], so keep that allocation small until supplier data confirm volume. Indicator: Ethiopia's share of import value. Trigger: if the share rises again, shift more green volume to Brazil; if supplier data confirm Khawlani volume, widen the allocation.

Product: a roasted range before green trading

Roast locally rather than rely on green trading alone. The roasted share of value rose from 27.5% in 2021 to 31.3% in 2024, and roasted imports reached USD 184.8 million in 2024 [F1]. Finished-goods demand of this size is what a local roaster would serve. Indicator: roasted share of import value. Trigger: if the share falls below 31.3% in a later update, hold roasting capacity at its current scale and keep green sales as the core.

Channel: wholesale to cafés and hotels before own stores

Sell wholesale to cafés and hotels first, and defer own-branded stores. Channel margins were not retrieved [F1], so this order follows from the reasoning here rather than from sourced economics. It keeps capital at risk low while the roasted range is tested with trade buyers. Indicator: repeat orders per wholesale account. Trigger: open own stores only after wholesale accounts reorder consistently.

Price: forward contracts and index-linked pricing

Import prices moved widely, from USD 3.34/kg in 2016 to USD 5.84/kg in 2022, and stood at USD 5.43/kg in 2024 [F1]. Fix part of green volume through forward contracts, and price the rest against an index, so wholesale and menu prices can be reset on a set review cycle. Indicator: average import price per kg. Trigger: if the average moves materially from USD 5.43/kg, review wholesale price lists and the share of volume under forward cover.

Compliance: SFDA registration and Arabic labelling

Register the establishment and each product on the SFDA's Ghad platform, and clear each shipment on Fasah with its supporting documents [W17]. Labels must be in Arabic and show country of origin, ingredients and shelf life under GSO 9:2022 [W18]. These points come from trade guidance rather than the SFDA text [W17] [W18], so check them against the current SFDA publication before first shipment. Indicator: registration status per product and label review results. Trigger: no product ships or sells until registration and label review are complete.

12. Entry plan

The phases below are a proposed sequence. The durations, owners and order of steps are proposed by the author and are not sourced timings. Each phase closes with a go or no-go gate tied to indicators in the market workbook [F1]. No Saudi Ministry of Investment licensing guidance was retrieved, so licensing steps and timings are unsourced. Investment ranges for the roastery and cafés will be set from supplier and site quotes [F1].

Phase 1: licensing, compliance and a small roastery (months 0 to 6, proposed)

Owner: managing director, with a compliance lead for registration. Deliverables: the establishment and each food product registered on the SFDA Ghad platform, with each shipment cleared on Fasah [W17]; Arabic labels that show country of origin [W18]; a supplier shortlist covering a dual-origin base with Ethiopia and Brazil and a Khawlani allocation; and a small roastery running test batches. Registration must precede the first import, so it is the first deliverable in the sequence. We recommend starting the roastery at small scale, because the roasted share of value has been around 31% in recent years [F1].

Gate 1 (month 6): go if registration is complete, every shortlisted supplier has a written quote and the roasting trials are approved. Roasted share of value was 31.3% in 2024 [F1]. We read this as a reason to start with a roasted range. It is a judgement drawn from one year's share, not proof of demand, so roastery scale should be reviewed at Gate 2.

Phase 2: wholesale and a Khawlani origin line (months 6 to 18, proposed)

Owner: sales lead. Deliverables: wholesale supply to cafés and hotels, a Khawlani origin line sold alongside the blends, and supply contracts with forward pricing. The roasted share of value was 31.6% in 2019, 33.8% in 2020, 27.5% in 2021, 28.1% in 2022, 29.9% in 2023 and 31.3% in 2024 [F1]. It has not shown a steady rise, so the wholesale case should be tested at a share near 31%, not at a growth rate.

Gate 2 (month 18): go if imports per person are at or above the 2024 level of 3.16 kg [F1], and the roasted share stays within the 27.5% to 33.8% range [F1]. If the average import price moves well above the 2024 level of USD 5.43 per kg [F1], we recommend repricing forward contracts before any expansion. If Ethiopia's share of value stays at or above 50% [F1], we recommend keeping Brazil active as a second origin.

Phase 3: own-branded cafés in one city (months 18 to 36, proposed)

Owner: operations director. Deliverables: two to three cafés in one city, opened one at a time, with site and fit-out quotes replacing any capital estimate. Gate 3 (before the first café opens): go if wholesale volumes are running and the quotes fit the approved budget. Gate 4 (before each further café): go if imports per person and the roasted share still meet the Gate 2 thresholds. A no-go at any gate holds the business at its current size.

References

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[C2] saudi-coffee-data-2014-2024.xlsx / Annual imports — calculated from the stated cells

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