

**THE
STATE OF
FASHION
SECTOR
IN SAUDI
ARABIA**

2025



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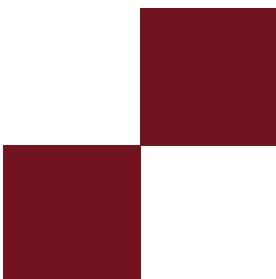
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CEO MESSAGE



Burak Çakmak
CEO of the Saudi Arabia
Fashion Commission

Marking five years since the founding of the Saudi Fashion Commission invites both reflection and anticipation. What began as a mandate to build the foundations of a national fashion sector has evolved into a broader mission to shape a creative economy rooted in identity and resilience. This year, the fashion industry in Saudi Arabia is expected to reach USD 34 billion, reaffirming the Kingdom's position as the fastest growing market in the GCC.

Yet the numbers only tell part of the story. What they reflect is the energy of a new generation of designers and entrepreneurs, and the long-term investments that continue to drive change across the value chain.

Saudi Arabia's emergence as a global fashion player is no coincidence. It is the result of sustained collaboration between public entities and private enterprises, anchored in a shared vision of innovation and education. The Fashion Commission's role in this journey has been to serve as an enabler, to create the conditions for talent to thrive, for industry to grow, and for local stories to reach the world.

This year, we made important strides across multiple fronts. In collaboration with Institut Français de la Mode, we localized widely respected fashion programs, bringing world-class education to Saudi creatives. In parallel, our sustainability agenda advanced through the launch of two key initiatives, laying the foundation for the Kingdom's first Circular Fashion Center.

Preserving cultural heritage remains a priority. At the 2025 Saudi Cup, we showcased the work of designers who are bridging traditional techniques with contemporary design. Such efforts demonstrate how tradition and innovation can together drive new forms of expression.

Internationally, our partnership with Selfridges and the Cultural Development Fund brought Saudi fashion to one of the most influential retail platforms. Through this year's pop-up in London, consumers experienced firsthand the creativity, craftsmanship, and authenticity that define the Kingdom's design landscape today.

At home, Riyadh Fashion Week continues to grow in stature and significance. It has become a key moment in the global fashion calendar, connecting local talent with international buyers, press, and key opinion leaders, while offering a platform to shape how Saudi fashion is seen, understood, and celebrated.

These initiatives are not isolated milestones. They form part of a broader strategy to build a more self-sufficient and globally integrated industry, one that reflects the ambitions of the Kingdom and the distinct identity of its people.

Saudi Arabia is not simply participating in the conversation. It is helping to shape it. With a digitally fluent consumer base, growing production capabilities, and a dynamic community of designers and entrepreneurs, the Kingdom is building an ecosystem defined by purpose, scale, and originality.

As the global fashion industry continues to navigate economic uncertainty, supply chain shifts, and evolving trends, Saudi Arabia stands out as a market of momentum. With fashion and luxury set to drive 45% of GCC growth by 2029, the path forward is promising and within reach.

While much has been achieved, our work is far from over. With a strong foundation and a clear vision, we are entering a new phase of sustained progress. This is just the beginning.



01.

SAUDI ARABIA: A STRONG AND GROWING FASHION HUB

Saudi Arabia's fashion market continues to surge ahead, experiencing rapid growth that is solidifying the Kingdom's leadership on the regional fashion scene. From 2025 to 2029, Saudi Arabia's fashion and beauty markets are forecast to expand by USD 6 billion bringing the total market value to USD 40 billion.^{1 2} This growth is driven by a combination of factors: a robust economy and thriving tourism industry along with favorable demographics including a young, tech-savvy population with rising disposable incomes. In short, Saudi Arabia is firmly established as the region's fashion powerhouse, providing fertile ground for both international brands and homegrown designers to flourish.

The Kingdom's growing cultural influence is reflected in flagship platforms such as the Riyadh and Red Sea fashion weeks, with positive sentiment from the Saudi public further underscoring this growth.

Saudi Arabia is firmly established as the region's fashion powerhouse, providing fertile ground for both international brands and homegrown designers to flourish.

Recent surveys show that 77% of the public is familiar with Riyadh Fashion Week (RFW) and 79% expresses interest in attending future RFW shows and events, highlighting the strong awareness and cultural relevance of the event.³

This momentum is further accelerated by Vision 2030 initiatives, which include substantial support for creative industries and SMEs through programs such as the Saudi 100 Brands Program by the Fashion Commission and other programs by the Cultural Development Fund, bolstering both consumer confidence and business innovation across the fashion ecosystem.

The rising confidence is well founded. In recent years, Saudi Arabia has dramatically improved its business climate, thanks to streamlined regulations like instant business licensing and a national franchise program that makes market entry easier for entrepreneurs. As of 2024, Saudi Arabia had issued 1.6 million active commercial

licenses, with 41% of new business registrations owned by women, reflecting the country's progressive policies designed to empower female entrepreneurs and diversify the economy.⁴

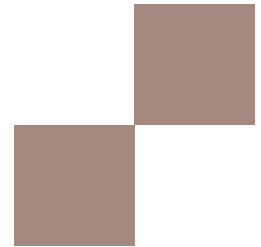
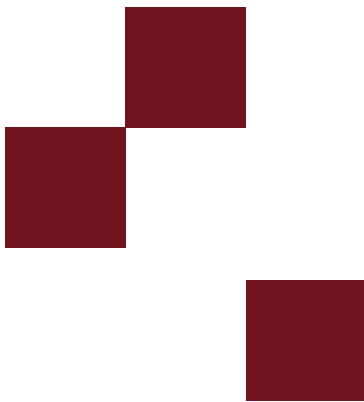
At the same time, Saudi Arabia has invested heavily in retail infrastructure and logistics, from world-class malls to last-mile delivery systems. Notably, e-commerce has grown exponentially, with online sales via the domestic Mada payment network soaring from USD 2.75 billion in 2019 to USD 53 billion in 2024, a ~20-fold increase in five years.⁵ This rise in digital retail, combined with a proliferation of shopping centers and upscale retail developments, has pushed the broader retail sector to new heights. These figures underscore the vast spending power now being unlocked in Saudi Arabia's consumer economy, fueled by higher incomes, modernized regulations, and a national embrace of entrepreneurship and innovation.



Economic Contribution and Job Creation

In the context of advancing digital technology and Vision 2030 ambitions, Saudi Arabia's fashion industry has emerged as a significant pillar within the nation's diversified economy. Reflecting broader economic trends, inflation data from the Economist Intelligence Unit (EIU) indicates a cumulative 14% rise in the Consumer Price Index (CPI) between 2019 and 2024, averaging approximately 2.7% annually. Additionally, the fashion and beauty sectors have exhibited an increased economic multiplier effect, demonstrating higher value added per unit of output.

The fashion and beauty sector in Saudi Arabia contributes 2.6% to the national gross domestic product (GDP), amounting to USD 33.6 billion. This marks a substantial increase from USD 27.2 billion (2.5%) in 2024, a year-over-year increment of USD 6.4 billion.¹



* The analysis undertaken as part of this study adopts a broad definition of fashion, which is in line with international research and aligns with the Fashion Commission's strategy. This broad definition includes activities that contribute to the fashion industry as well as elements that are broader than a cultural definition of fashion.





While domestic consumption remains the primary engine of growth, the fashion and beauty sectors continue to be shaped by their integration with global trade. One illustrative example is apparel imports, which increased by more than 35% between 2018 and 2022, rising from USD 3.9 billion to USD 5.4 billion. This growth was driven by strong demand for international brands, rising household spending, and the expansion of retail infrastructure. From 2022 to 2024, however, apparel imports stabilized at approximately USD 5.2 billion.^{1 6*}

This trend reflects the growing impact of localization efforts under Vision 2030, including policies that promote domestic production, encourage investment in emerging Saudi designers, and aim to reduce reliance on imported goods. Although imports continue to represent a significant part of the fashion value chain, particularly in raw materials and finished products, the Kingdom is steadily building the foundation for a more self-

reliant and export-oriented fashion ecosystem. In addition, Saudi Arabia's fashion and beauty industry employs an estimated 343,000 people as of 2024, up from around 320,000 the previous year, reflecting expansion in the fashion sector and a broader talent pool. Fashion sector jobs span the entire value chain, with around 51% of the total workforce holding 'core' fashion roles in creation, production, distribution, consumption, and after-sales. This marks a 3.5% increase on the previous year, pointing to rising demand for specialized roles as the industry matures. Non-core support functions, such as accounting and photography, account for 49% of the workforce, up 11.3% on last year, due in part to the sector's expansion into ancillary services including logistics and retail.¹ The sector's growth is thus generating opportunities both on the creative frontlines and in ancillary services that support Saudi Arabia's evolving fashion ecosystem.



* Apparel includes Harmonized System Chapter 61 (Knitted or crocheted apparel and clothing accessories) and Chapter 62 (Non-knitted apparel and clothing accessories); Footwear includes Harmonized System Chapter 64 (Footwear).

343,000

Total Jobs in Saudi Fashion Industry in 2024

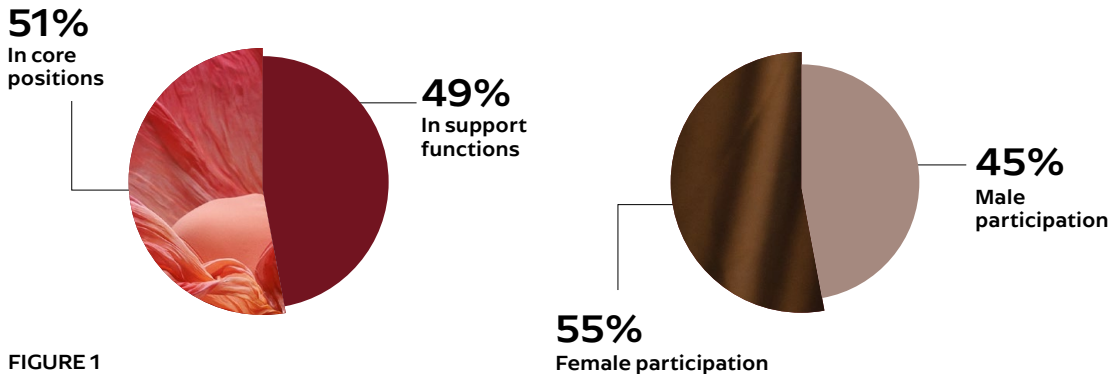


FIGURE 1
Saudi Fashion and Beauty Sector Workforce Composition (%), 2024¹

Saudi women now make up 55% of the fashion workforce, reflecting the industry's leading role in advancing gender equality and female empowerment.

Saudi Arabia's fashion workforce is an indicator of success in meeting Vision 2030's social transformation goals, not least when it comes to gender and equality. Notably, Saudi women now comprise of 55% of the fashion labor force – this underscores the sector's commitment to gender equality and the empowerment of women.¹

Women are not only joining the workforce but also rising to leadership roles, with recent statistics revealing that women held around 44% of management positions in Saudi Arabia last year.⁷ However, in the fashion retail sector, representation at the executive level remains limited, with female presence in the C-suite of large retail firms in the Middle East estimated around 20% in recent years.⁸ While there is room for further improvement, female empowerment is already reshaping consumer behavior, as more women with professional careers and disposable income are

driving demand for diverse, personalized fashion services.

Meanwhile, talent localization is no longer aspirational; it is well underway. Today, Saudi nationals hold nearly half (47%) of core fashion jobs, thanks in large part to ongoing Saudization efforts.¹ Government programs from training scholarships to incubation hubs are cultivating local designers, artisans, and retail professionals to ensure that as the sector grows, Saudi talent grows with it.

Overall, the fashion and beauty sector's GDP and employment contributions are on a strong upward trajectory, and they are expected to continue climbing as Vision 2030 investments in education, innovation, and retail infrastructure bear fruit. Regulators see fashion as a key avenue for job creation, especially for youth and women, and for expanding the non-oil knowledge economy through a creative industry.

Luxury and Mass Market Segments

Saudi Arabia's fashion market spans a broad spectrum from affordable mass-market products to high-end luxury goods, and both segments are expanding dynamically. The mass market or non-luxury segment, which includes categories like apparel, footwear, accessories, sportswear, beauty, and jewelry, makes up the majority of spending, accounting for roughly 86% of the total market value. This mainstream segment is expected to reach a value of approximately USD 28.8 billion in 2025,

up from USD 27.7 billion in 2024, fueled by a young population's need for everyday fashion, the proliferation of international retailers, and the rise of local brands. Looking further ahead, the mass market segment is projected to grow around 4% annually through 2029, consistent with the overall market trend. These compelling figures and projections indicate solid volume growth as new malls open and e-commerce penetrates further into secondary cities.^{1 2}

The mass market in Saudi Arabia was valued at USD 28B in 2024, and is projected to grow to over USD 34B by 2029, driven by strong demand in beauty, apparel, and sportswear segments.

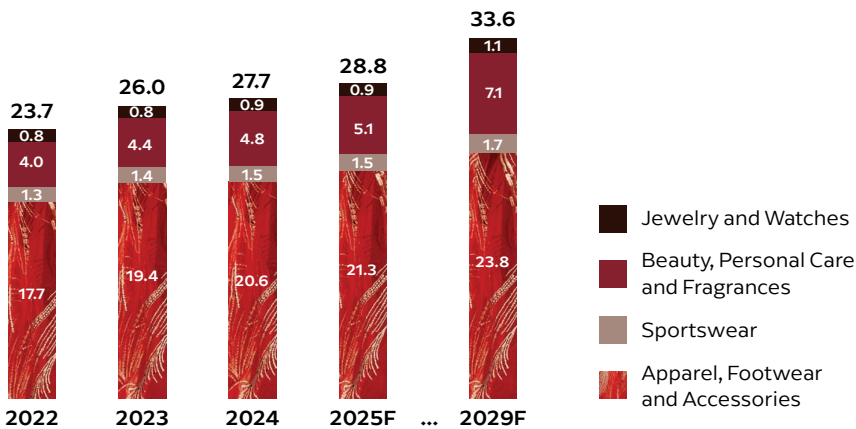


FIGURE 2
Mass Market Size in Saudi by Product Segment, USD B^{1 2}

Though smaller than the mass market, the luxury segment is growing steadily as Saudi Arabia emerges as a major luxury hub. The segment includes haute couture, fine jewelry, premium cosmetics, designer apparel, and accessories, with sales on

track to grow at a compound annual growth rate (CAGR) of approximately 5% through 2029, reflecting healthy demand and sustained expansion. At this pace, luxury retail is expected to be worth approximately USD 5.9 billion by 2029, up from around



USD 4.6 billion in 2024. In 2025, luxury fashion in Saudi Arabia is forecast to reach approximately USD 4.9 billion in annual sales.^{1 2}

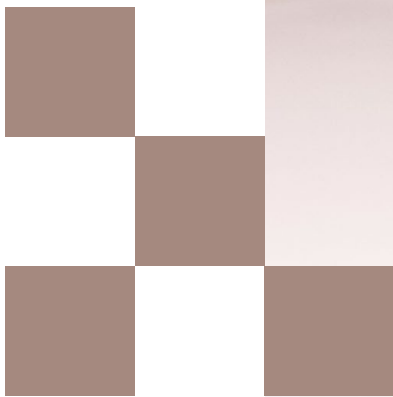
Several factors are driving this upscale growth, including an increasing number of ultra-high-net-worth individuals. This year, Saudi Arabia is home to nearly 140,700 millionaires. That figure is projected to rise by 85,300 by 2030 reaching 226,000, positioning the Kingdom as an increasingly attractive market for luxury fashion.² According to Chalhoub Group CEO, Michael Chalhoub, while Saudi Arabia accounted for only 18% of GCC personal luxury sales in financial year (FY) 2024, it is recording growth of +5%

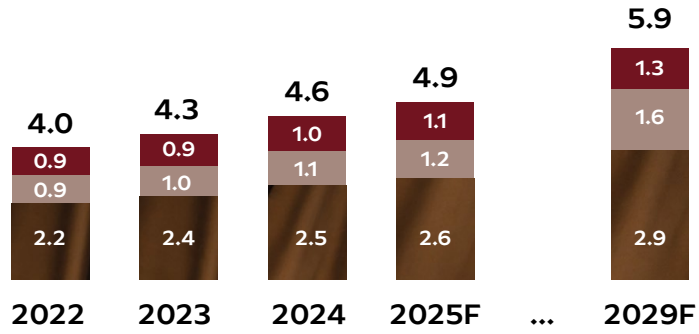
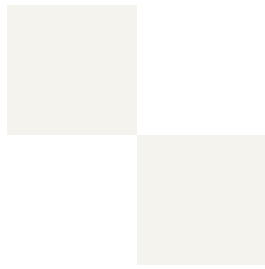
year-on-year, significantly higher than the global average. As a result, it is becoming one of the most exciting frontiers for luxury globally, and the foundations are firmly in place for expansion.⁹

The social media-fueled desire for exclusive brands among a fashion-conscious youth, The social media-fueled desire for exclusive brands among a fashion-conscious youth and the local presence of global luxury houses are also accelerating growth. also accelerating growth.

Notably, in recent years, top luxury brands from Louis Vuitton and Dior to Cartier and Van Cleef & Arpels have not only expanded their store networks in Saudi Arabia but also launched Saudi-exclusive collections and experiences, signaling confidence in the market's potential.

Meanwhile, Saudi Arabia's own nascent luxury designers and concept boutiques are beginning to cater to niche tastes, adding homegrown flavor to the luxury mix.





Saudi Arabia's luxury market was valued at USD 4.6B in 2024 and is projected to reach USD 5.9B by 2029, with growth led by apparel, beauty, and jewelry segments.

- Jewelry and Watches
- Beauty, Personal Care, and Fragrances
- Apparel, Footwear, and Accessories

FIGURE 3
Luxury Market Size in Saudi by Product Segment, USD B^{1,2}



The net effect of these driving forces is balanced growth across price tiers: mass-market fashion is steadily expanding its already large base, while the luxury segment is projected to grow ~1.2x faster than mass fashion.^{1 2} This dual momentum highlights both the depth and breadth of consumer demand ranging from value-driven shoppers in city malls to luxury connoisseurs at boutique openings.

Further reinforcing this trend, Chalhoub Group's GCC Luxury Tracker reveals that over 50% of Saudi consumers feel financially "very well off", supporting both high-ticket luxury and everyday premium purchases.⁹ In 2025, the value of Saudi Arabia's fashion market is expected to reach approximately USD 34 billion, with the mass market segment accounting for around USD 29 billion (84%) and luxury totaling USD 5 billion (16%).^{1 2}

These figures firmly position Saudi Arabia as the key market in the Middle East for all segments of fashion, commanding investor attention and retail expansion plans that exceed the expectations set out in earlier reports. Not only is Saudi Arabia home to one of the largest fashion markets in the region today but its growth across both luxury and mass sectors is also the most robust, ensuring it will remain the driving force of Middle East fashion in the years ahead.^{1 2}

Demographics and Rising Spending Power

Underpinning Saudi Arabia's fashion growth is a powerful demographic advantage and a rapid rise in consumer spending power. Saudi society skews young with around 60% of the population under the age of 30, and this youthful cohort is both style-conscious and digitally connected.¹⁰ Young Saudis are highly engaged with social media and global pop culture, which means trends from New York, Paris, or Seoul quickly find an enthusiastic audience in Saudi Arabia. From high-street brands to sneaker culture, Saudi youth are shaping a new fashion identity that is proudly Saudi yet outward-looking. Diverse trend awareness and digital fluency translate into greater demand for variety and novelty in the market, pushing brands to keep up with fast-changing tastes.

Crucially, this evolution in demographics coincides with greater economic participation and spending power among women as discussed above. More women are entering the workforce and many are rising to leadership roles, presenting a key market segment for fashion and beauty, with preferences that span luxury handbags, cosmetics, wellness, and upscale abayas. The retail scene reflects this; more women-centric boutiques are opening, female-led fashion startups are growing in number, and there is an increase in marketing campaigns tailored to the modern lifestyles of Saudi women.

At the same time, overall affluence in Saudi Arabia has risen as a result of economic growth and diversification. Dual-income households are more common, and the government's Quality of Life Program (QOLP) under Vision 2030 have significantly

contributed to job creation and economic diversification, translating into discretionary spending on fashion and leisure. In particular, Saudi Arabia's middle class and upper-middle class segments are expanding, producing a cadre of consumers eager to spend on apparel, beauty, and accessories as part of their lifestyle. Social norms around fashion are also

evolving. Compared to a decade ago, there is far greater acceptance of diverse styles and an expectation to express personal identity through clothing, particularly among the youth.

In short, Saudi Arabia's young, urban, educated, and increasingly affluent population is a fundamental driver of the nation's fashion

market. The coming years will see this large youth segment advance into their peak earning and spending years, suggesting that the domestic consumer base for fashion will only get stronger. Coupled with the influx of expatriate professionals and the rise of women's economic power, this creates an enviable consumer mix that is almost unique.

Shopping frequency in Saudi Arabia is youth-driven: over 40% of consumers under 35 shop weekly or more, compared to less than 1 in 9 among those aged 45 and older.

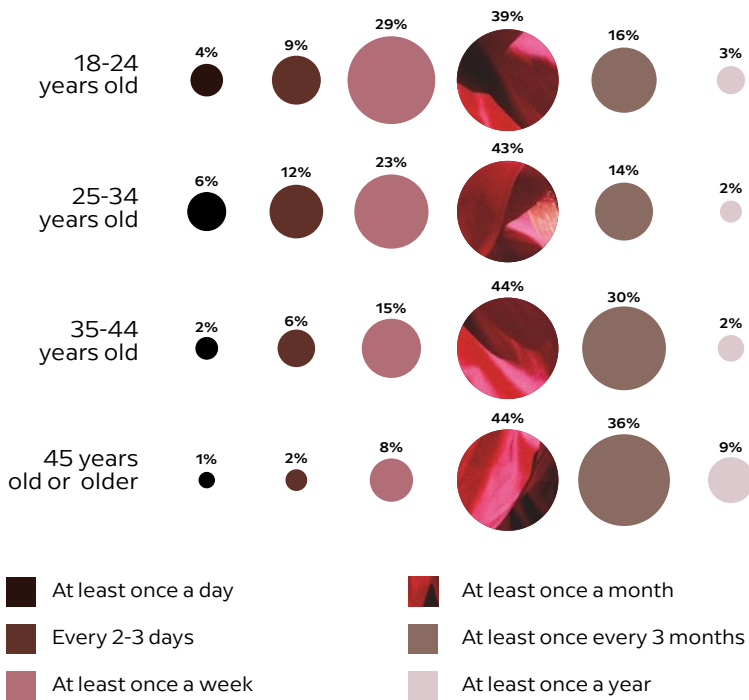


FIGURE 4
Reported Spending Trends in Saudi, by Age Group (%)³

Tourism as a Fashion Growth Engine

Another major catalyst for Saudi Arabia's fashion industry is the rise of tourism, fueled by Vision 2030. The government aims to grow tourism's GDP contribution to 10% and

attract 150 million visits annually by 2030. In 2024 alone, Saudi Arabia welcomed around 116 million domestic and inbound tourists, a 6% increase on 2023. Notably, inbound tourism reached a record 30 million visitors in 2024, an 8% year-on-year





rise, while inbound tourism spending surged to USD 44.9 billion, up 19% from the previous year. This influx, comprised largely of leisure travelers and religious pilgrims, is expected to drive substantial spending in retail and fashion, from luxury goods to everyday apparel and souvenirs.¹¹

Retail has become a core component of the tourism experience. As new attractions such as theme parks, beaches, and heritage sites are unveiled, they are being paired with world-class shopping complexes and concept stores to capture tourist spending. For example, the upcoming Diriyah Square project is set to include a high-end open-air shopping district with 400+ stores, positioning the wider Saudi capital as a global retail destination.¹²

Saudi Arabia is also fast becoming a global events hotspot, further fueling fashion-related tourism. Flagship events such as the Red Sea International Film Festival, the Formula 1 Grand Prix in Jeddah, and Riyadh's winning bid to host Expo 2030, are attracting a new wave of international tourists, media, and industry VIPs.

The coming years will only amplify this trend. Fashion and luxury players are eager to capture visitor segments including high-spending GCC tourists, Western business travelers, the millions of Muslim pilgrims, and

experience-driven cultural tourists. This expanding audience presents a major opportunity for brands to increase reach and revenue within the Kingdom.

With all these factors combined, tourism is set to become a primary growth engine for Saudi fashion, generating new revenue, reducing leakage of retail spending as fewer Saudis travel abroad just to shop, and reinforcing the nation's reputation as both a retail haven and a cultural hub. Few global markets offer such a unique opportunity to scale fashion consumption through tourism.

In sum, Saudi Arabia's dynamic fashion market is not just thriving; it is setting a new benchmark for regional leadership. The Kingdom's blend of economic strength, demographic advantages, and strategic Vision 2030 initiatives uniquely positions it to drive sustained growth in the GCC fashion landscape. As international brands deepen their Saudi presence, local designers and entrepreneurs are also flourishing, adding distinctive Saudi authenticity to global fashion dialogues. With continued investments in retail infrastructure, innovation, and digital expansion, Saudi Arabia is poised to shape the future of fashion, offering unmatched opportunities for stakeholders eager to partake in its vibrant evolution.

02.

A RESILIENT CONSUMER BASE: DECODING AND ENGAGING THE SAUDI CONSUMER

Youth and Women Driving the Demographic Advantage

Saudi Arabia is one of the world's youngest consumer markets and its youthful population is powering momentum within the fashion ecosystem. Educated, digitally connected, and socially engaged, young Saudis are shaping fashion consumption patterns, and

their spending power is rising as they enter the workforce with increasing propensity. National unemployment in fact dropped by around 30% between 2019 and 2023, with the unemployment rate for the total population standing at 3.5% in Q4 of 2024.¹⁰



As detailed above, women have also become formidable drivers of the fashion sector, holding more than half of the jobs in the industry and assuming management and leadership roles across sectors. This combined force of youth and female empowerment is transforming the Saudi fashion landscape from both the demand and supply sides.

Cultural pride and social media influence amplify this demographic advantage. Young Saudis seamlessly fuse

global fashion trends with local tradition; for instance, pairing Western casualwear with a traditional abaya or incorporating heritage motifs into modern streetwear. Meanwhile, 34% of consumers use TikTok as their primary source of fashion inspiration and purchase, fueling a rapid exchange of style ideas.³ Trends therefore spread quickly across Saudi Arabia's hyper-connected youth, who use platforms to discover brands and showcase personal style.

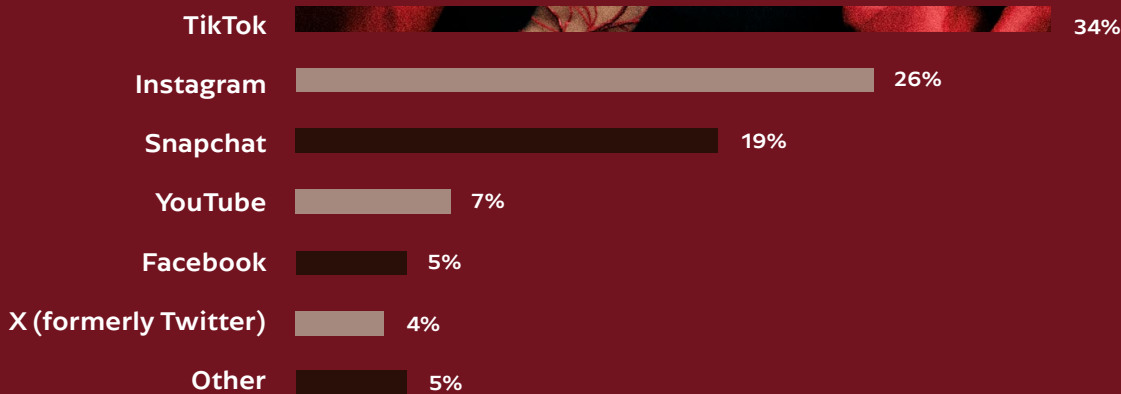


FIGURE 5
Top Social Media Platforms Influencing Saudi Fashion Buyers (%)³

For fashion businesses, it is important to decode the nuances of a generation that might covet a global sneaker brand and a home-grown designer abaya with equal fervor. From women professionals to young tech-savvy shoppers, engaging Saudi consumers

necessitates an understanding of how and why they shop. To this end, a new 2025 consumer perception survey offers fresh insights into purchase behaviors, brand awareness, and loyalty across Saudi Arabia's diverse shopper segments.

The youth and women of Saudi Arabia are not just adapting to fashion; they are defining its future.

The Saudi Fashion Consumer in 2025: Behaviors and Preferences

A new 2025 consumer perception survey offers insights into purchase behaviors, brand awareness, and loyalty across Saudi Arabia's diverse shopper segments.

Spending and Purchase Behavior:

Saudi consumers are demonstrating strong and sustained interest in fashion, with 44% reporting an increase in fashion spending over the past year and an additional 48% stating that their spending remained consistent.³ Purchase frequency is also notable: 43% buy fashion items at least once a month, and 19% shop weekly. The key drivers behind increased spending include the greater availability of discounts, shifts in lifestyle, and changing fashion preferences.³

In terms of shopping channels, 41% of consumers favor e-commerce aggregators such as Amazon, Noon, and Farfetch, while 26% shop via brand-owned online stores. Social commerce is also emerging, with 14% spending most on platforms like Instagram and TikTok.³

Local vs. Global Brand Preferences:

The survey reveals a nuanced loyalty split between homegrown brands and international labels. Among consumers, 55% indicated stronger loyalty towards local brands, driven by a sense of national pride and a desire for unique designs.³ Chalhoub's recent fragrance brand survey supports this finding: seven of the top 25 brands mentioned by Saudi consumers were local Arabic fragrance brands, illustrating the depth of loyalty toward regional players, especially in culturally rooted categories like perfume.⁹



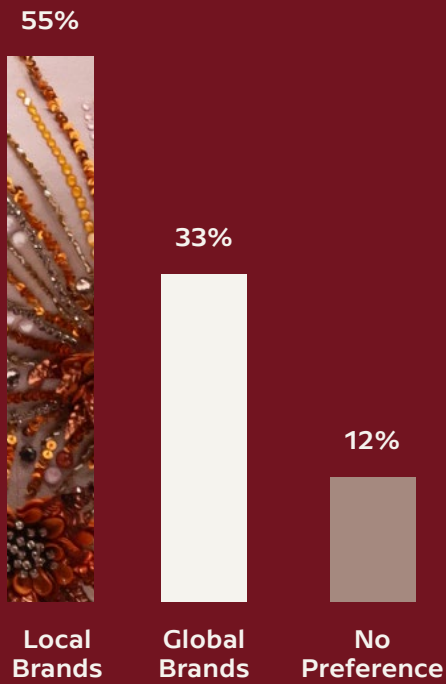


FIGURE 6
Brand Loyalty: Consumer Preference for Local Versus Global Fashion Brands (%)³



When it comes to Saudi brands, consumers prioritize quality first, price competitiveness second, and national pride in supporting the local industry third.

Saudi consumers seek quality, price competitiveness, and national pride when supporting local brands. Quality is the top driver, influencing 85% of respondents, followed closely by price competitiveness (68%) and the desire to support local industry (67%). Design/style (55%) and sustainability credentials (41%) also play a role. Brand loyalty is strengthened when labels reflect Saudi culture, employ local creatives, and offer exclusivity and storytelling, demonstrating

that cultural relevance can boost loyalty to both local and international companies.³ In addition to cultural relevance, loyalty programs and personalized engagement are also significant. Approximately 53% of respondents reported that they favored brands that rewarded their loyalty, whether through points, VIP events, or other benefits. A similar share expressed appreciation for personalized recommendations from store staff or online platforms.³

When ranking fashion purchase decisions, Saudi consumers prioritize quality first followed by price, highlighting a strong preference for durable, well-crafted products over labels.

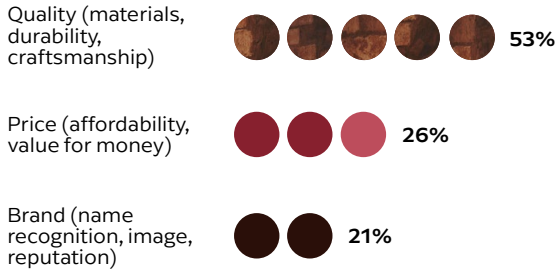


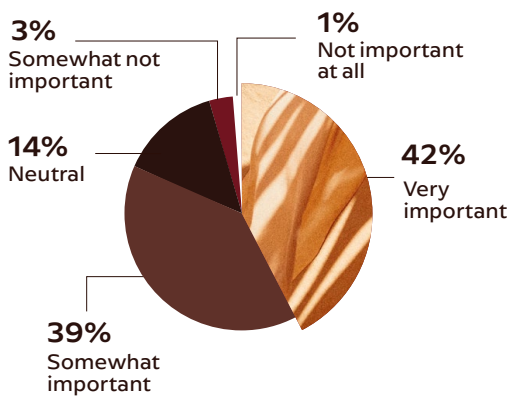
FIGURE 7
Fashion Purchase Decisions: What Matters Most to the Consumer? (%)³

Customer Experience and Satisfaction:

The modern Saudi consumer is discerning and holds brands to high standards. Supporting this point, more than half of Saudi consumers (53%) identify product quality as the most important factor in their fashion purchase decisions, followed by price and brand reputation. Beyond the product itself, customer experience also plays a decisive role, often outweighing short-term influences like social media trends in shaping purchasing behavior.³

While social media trends influence purchase decisions for most Saudi consumers, customer experience holds greater weight, with 59% rating it as extremely important.

Importance of Brands Reflecting Social Media Trends



Importance of Customer Experience in Purchase Decisions

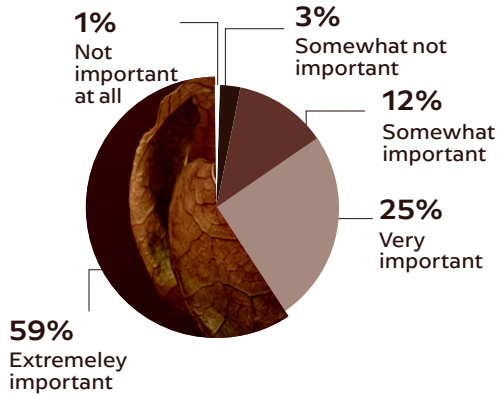


FIGURE 8
Key Influencers in Fashion Purchase Decisions: Social Media Trends Versus Customer Experience (%)³

Abaya and Thobe: Tradition Meets Contemporary Lifestyles

Traditional attire remains at the heart of Saudi fashion, but the way consumers approach abayas and thobes is evolving with trends and personal preferences.

84% of Saudi women buy a new abaya at least once every three months, reflecting strong seasonal and style-driven demand.

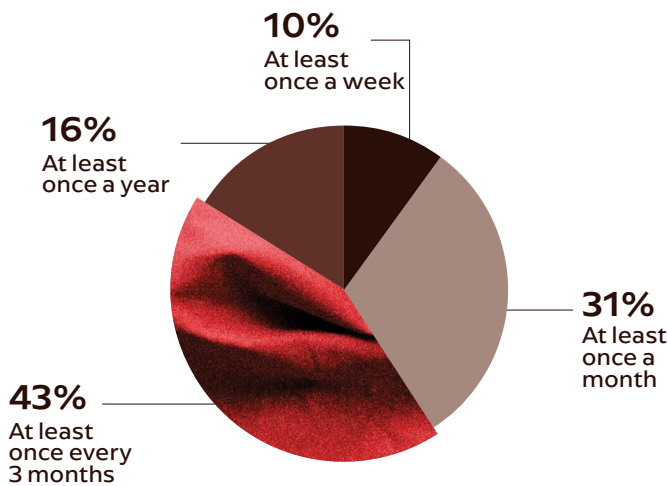
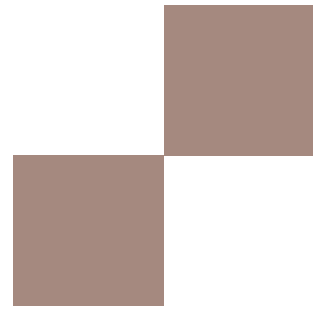
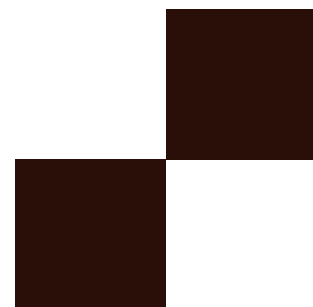


FIGURE 9
Abaya Purchase Frequency by Saudi Consumers (%)³



Abaya Consumption:

For Saudi women, the abaya is both daily wear and a statement piece. On average, Saudi women purchase a new abaya every two to three months, reflecting both practical use and seasonal fashion cycles. Annual spending on abayas averages around USD 1,067 (¥ 4,000~) per consumer, though this varies widely by income and taste. Affluent fashionistas may invest significantly more in designer abayas, while others prefer more affordable options for everyday use.³



Over 90% of Saudi men buy tailored thobes at least once a year, with 70% preferring custom tailoring over ready-to-wear options.

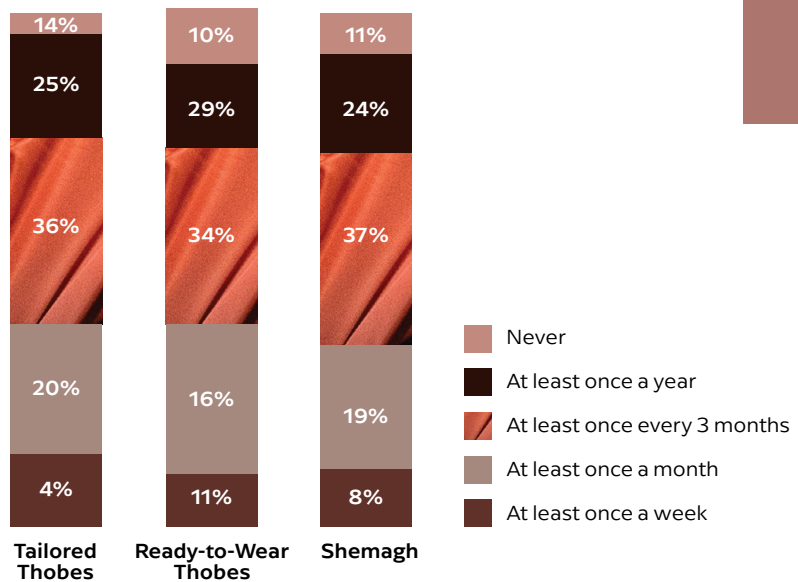


FIGURE 10
Traditional Menswear Purchase Patterns in Saudi Arabia (%)³



Thobe Preferences:

For Saudi men, the thobe is an everyday essential that also reflects personal style and status. Research indicates that men favor tailored thobes over ready-to-wear (RTW) options. On average, Saudis add three to four thobes annually to their wardrobe, often timing purchases before Eid holidays, weddings, or seasonal wardrobe updates. The ratio of tailored to off-the-rack purchases stands at approximately 70:30 in favor of custom tailoring. In terms of spending, Saudis invest around

USD 667

(¥ 2,500~) per year on thobes, and

USD 130–185

(¥ 500–700 ~) on shemaghs, depending on fabric quality and brand.³



Repatriation of Luxury Spending

One of the most significant shifts in Saudi consumer behavior is the repatriation of luxury spending, with affluent consumers increasingly choosing to shop at home rather than abroad. Historically, a large portion of Saudi luxury expenditure leaked to fashion capitals like Dubai, London, and Istanbul. For instance, during the last Eid Al Adha, premium card spending in these cities remained dominated by fashion, with average spending per card at USD 399 in Dubai, USD 447 in Istanbul, and USD 656 in London.

Several factors underpin this shift. First, Saudi Arabia has dramatically improved its luxury shopping experience. New high-end retail destinations are opening nationwide, from upscale shopping districts to ultra-luxurious malls such as Solitaire mall in Riyadh and planned mega-mall projects in Diriyah. Within these destinations, the presence of flagship stores, VIP boutiques, and pop-ups by major international luxury houses enable Saudi consumers to find the latest collections without leaving the country.

The message is clear: Saudi Arabia is no longer just an outbound customer pool; it is a primary luxury market in its own right, marked by significant consumer appetite. The fact that Hermès ranks as the number one boutique by spend for Saudi travelers in Dubai highlights that Saudi consumers continue to seek out brands not yet available domestically. This underscores the opportunity for international luxury brands to enter and expand in the Saudi market.¹³ By engaging Saudi consumers with localized experiences and demonstrating commitment to the country, global luxury houses are reaping rewards in the form of loyalty and sales. For their part, domestic luxury players are capturing business that once leaked overseas.

Growing Affluence and Consumer Confidence

Saudi Arabia's consumer base is not only young and trend conscious; it is also becoming wealthier and more confident. This development is partly driven by successful economic diversification efforts under Vision 2030. Government reforms and initiatives have been successful in encouraging local employment, entrepreneurship, and the increased participation of women in the workforce, translating into higher disposable income for many Saudi families.

Looking ahead, optimism is strong among Saudi consumers. Approximately 44% of consumers in the Kingdom have increased their fashion spending over the past year. This confidence is notable in a time of global economic uncertainty and is driven by Saudi Arabia's solid economic performance.³

Alongside increasing affluence and a sense of optimism, value-consciousness is also on the rise among Saudi fashion consumers. While overall spending remains resilient, many shoppers are becoming more deliberate in

how and where they spend. In the 2025 survey, 68% of respondents identified price competitiveness as a key factor influencing their support for Saudi fashion brands. Additionally, 81% of consumers say that promotional events such as Black Friday or Ramadan sales significantly influence their fashion purchases. This does not indicate a pullback in spending but rather a smarter approach to shopping. Consumers are increasingly waiting for promotions, comparing prices, and prioritizing value-driven purchases, favoring quality and timeless pieces over impulse buys. The trend is particularly pronounced among middle-income shoppers and is evident among affluent consumers who are also responding to incentives and differentiated price offers.³

Brands are responding to these developments by highlighting value propositions. For international retailers, this could mean launching Saudi promotions, while for local brands, emphasizing their quality-to-price ratio can increase their appeal among value-conscious shoppers.



Global brands are shifting from franchise models to direct ownership, embedding deeper into Saudi culture and consumer expectations.

03.

CAPTURING THE SAUDI CONSUMER: LOCALIZING GLOBAL BRANDS, ELEVATING SAUDI IDENTITY

Saudi Arabia has cemented its position as a pivotal market for global fashion brands, driven by economic reforms, a youthful population, and growing cultural confidence. However, 'glocalization', in one way is the ability to balance global brand equity with authentic local resonance, is also key to success. Global fashion players are adapting by shifting from franchise models to direct ownership, launching culturally tailored campaigns, collaborating with Saudi creatives, and integrating into national events like Eid drops or Saudi founding day. These moves reflect a deeper evolution: the Saudi consumer is an active tastemaker. As localization strategies mature, Saudi Arabia is not just adopting fashion, it is redefining how global brands enter and thrive in culturally rich, fast-modernizing markets.

Saudi Arabia is not just adopting fashion, it is redefining how global brands enter and thrive in culturally rich, fast-modernizing markets.

Global Brands: The Race to Enter Saudi Arabia

Saudi Arabia's fashion landscape is undergoing a transformation as international brands flood into the market. The Kingdom is fast closing the gap in brand presence, with major luxury houses launching flagships in Riyadh and Jeddah throughout 2024, signaling confidence in Saudi's consumer base. For example, Italian label Dolce & Gabbana opened a 16,000-square-foot flagship store in the Diriyah area, the brand's largest one-level boutique worldwide. The sprawling store carries Dolce & Gabbana's full collections and offers an exclusive collection of abayas. These high-profile launches underscore Saudi Arabia's rise as a must-enter market for fashion and luxury brands.

From Franchise to Fully Owned

One of the most significant recent shifts relates to the way that international brands are structuring their Saudi operations. Historically, global labels entered Saudi Arabia via local franchise partners or distributors, often large retail groups. Now, many brands are setting up joint ventures (JVs) or wholly owned subsidiaries in Saudi Arabia, rather than relying on third-party franchisees. Saudi officials actively encourage this trend as part of the national drive to create a pro-investor ecosystem. Foreign companies have the opportunity to set up an office, support their sales, or establish a distribution center in special zones, enjoying full ownership rights. One prominent example illustrating this franchise-to-direct pivot is Adidas, which transitioned from using regional distributors to launching its own local subsidiary.

Other sportswear giants and luxury maisons are also adapting. Chanel and Dior long relied on Gulf-based partners, but they now maintain regional offices and dedicate local teams to Saudi market development. The benefits of going direct include higher profit retention and brand integrity in customer experience, though this approach also requires on-the-ground expertise.



In response, Saudi Arabia has made starting a business easier with streamlined licensing and special economic zones that offer tax and logistics benefits. The net effect is a steady shift from franchise to direct operations. This trend is expected to continue as more labels gain confidence in navigating Saudi regulations independently.

Meanwhile, many brands are choosing hybrid models that involve entering the market via JVs with a Saudi investor or acquiring their former franchisee. These arrangements combine global brands' capital with local partners' market knowledge. Saudi Arabia's biggest retail conglomerates, such as Cenomi Retail and Chalhoub, remain key facilitators. Local retail groups are still partnering with new entrants, especially those unfamiliar with the Saudi consumer. In 2024, several niche and mid-tier brands opted for JVs with Saudi firms to accelerate store rollouts and tap into established distribution networks. This shows that while direct investment is on the rise, multiple entry models coexist, giving foreign brands flexibility in how they establish their Saudi footprint.

Localized Campaigns: Captivating the Saudi Audience

Alongside new store openings in Saudi Arabia, global brands are learning the importance of cultural localization in their marketing. Saudi consumers have shown they respond enthusiastically to brands that respect local culture and tailor their offerings accordingly. As a result, 2024 saw a surge in localized campaigns, capsule collections, and celebrity collaborations aimed specifically at Saudi audiences.

In an effort to resonate locally, one tactic employed by global brands is to use Saudi talent in brand storytelling. For example, New York-based fashion brand, Carolina Herrera, appointed Saudi model and influencer Daim Algaw as the face of its new fragrance campaign, while French luxury jeweler, Chaumet, collaborated with Yara Alnamlah for a jewelry campaign featuring Middle East-exclusive pieces. These moves demonstrate how global houses are embedding local personalities to build emotional relevance and tap into Saudi Arabia's digitally active, trend-sensitive youth.

In parallel, brands are now anchoring product drops to cultural moments, with Ramadan and Eid capsules becoming seasonal staples. High-street retailers like H&M and DKNY regularly launch Ramadan collections tailored to local preferences, while luxury fragrance brands are innovating with oud-based

scents designed specifically for the Gulf. For instance, British perfumer Penhaligon's recently introduced AlUla, a fragrance inspired by the Saudi city's natural and historical legacy.

This approach is prompting a broader shift in creative development. Increasingly, campaigns are designed 'in KSA, for KSA,' leveraging local agencies, creatives, and cultural codes. This has allowed international brands to blur the lines between global and local, ensuring their presence is not only visible but also meaningful to Saudi consumers.

Brand Recall in Saudi Arabia: Top-of-Mind Global and Local Players

As global brands accelerate their presence in the Kingdom and local players evolve with growing sophistication, top-of-mind recall offers a revealing lens into Saudi consumer behavior. Identifying which brand names surface unprompted reflects not only cultural relevance and emotional affinity, but also competitive strength in a crowded retail environment.

Top-of-Mind International Brands:

The most recalled international brands across key fashion-related categories are Zara, Adidas (ranked 1st in athleisure and footwear), and Nike (ranked 2nd in athleisure and footwear), reflecting strong brand salience and daily consumer engagement.

Zara’s vertically integrated supply chain efficiently updates collections twice a week with the latest global trends and regularly introduces capsules for Ramadan and Eid, ensuring sustained relevance among Saudi consumers. Adidas and Nike have significantly enhanced their visibility through strategic collaborations, producing official kits for major Saudi football clubs including Al-Nassr FC and Ittihad FC, and actively partnering with local influencers and athletes. Adidas currently operates seven prominent stores in Riyadh alone, further amplifying brand accessibility and consumer interaction.

Sephora maintains its top position in the beauty segment with extensive presence across Saudi Arabia,

reinforced by around 40 branches nationwide and recent initiatives like the Sephora Squad, a dynamic content creation community of regional beauty enthusiasts. SHEIN also registers strong recall, particularly among younger demographics attracted by its trendy, affordable offerings and digital-first approach.

In the luxury and couture segment, brands like Chanel, Cartier, and Rolex dominate consumer awareness, leveraging their iconic products and aspirational appeal. Chanel’s classic flap bag remains an enduring symbol of the brand while Cartier’s Love and Juste Un Clou collections continue to appeal to Saudi consumers following decades of popularity. For its part, Rolex

stands as a hallmark of luxury and social status, deeply integrated into the regional culture. This is highlighted by the luxury watchmaker’s iconic presence atop the clock tower in Makkah, symbolizing both prestige and sophistication.

These recall patterns demonstrate successful global marketing strategies combined effectively with local cultural resonance. Brands adeptly localize product offerings, leverage influential Saudi partnerships, align launches with national events like Ramadan and National Day, and expand direct operations within the Kingdom, achieving heightened visibility and emotional connectivity among Saudi consumers.

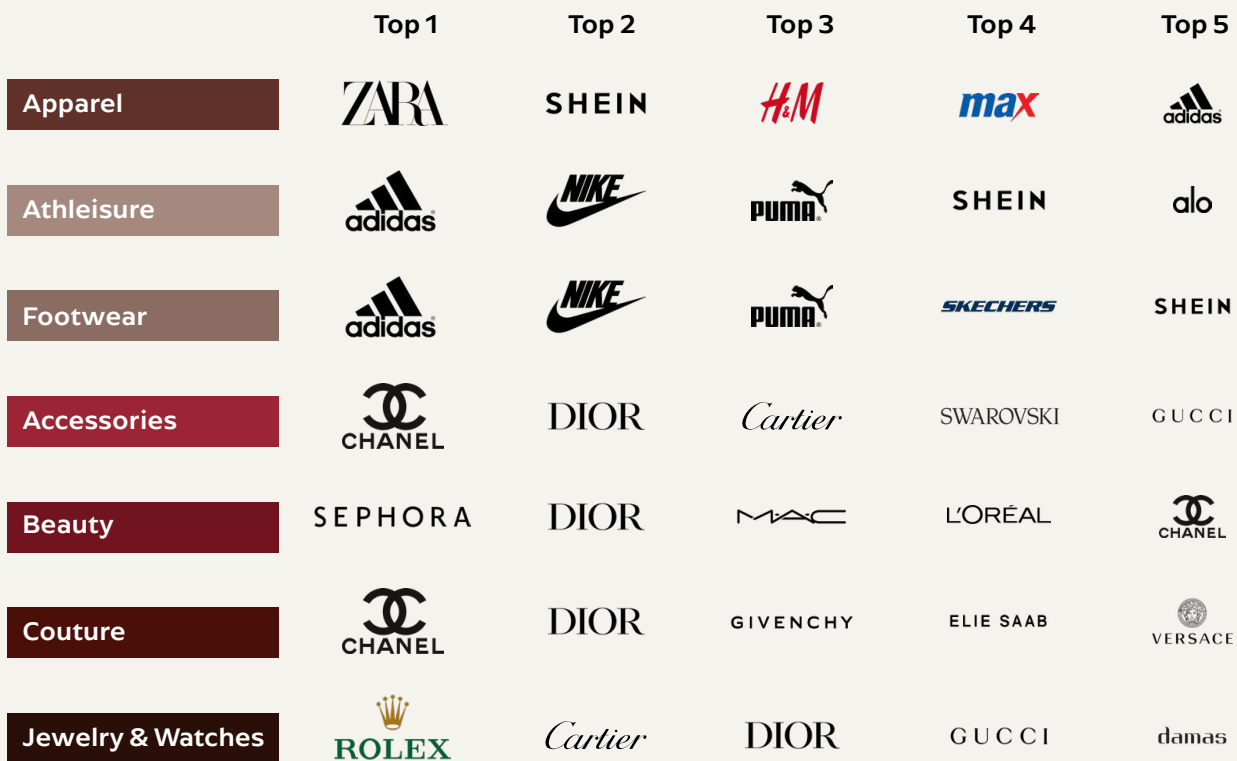


FIGURE 11
Top-of-Mind International Brands Among Saudi Consumers³

Top-of-Mind Saudi Brands:

A different pattern emerges when examining Saudi-origin brands. Names like Lomar, Nayomi, Tamashee, Abdul Samad Al Qurashi, and Ashi Studio appear top-of-mind across menswear, womenswear, footwear, beauty, and couture segments, demonstrating strong cultural resonance and national affinity. These brands are not just recognized; they are remembered for their authenticity and emotional connection with local consumers.

Nayomi, operating over 103 stores across the Kingdom, exemplifies widespread accessibility and appeal.

Ashi Studio, an internationally acclaimed brand, recently made headlines for designing uniforms for Riyadh Air's cabin crew, further reinforcing its brand prestige.

Lomar, with its network of nine stores, continues to redefine ready-to-wear stylish thobes and abayas, connecting traditional attire with contemporary style.

Abdul Samad Al Qurashi, operating since 1852, is renowned for its luxurious oud and musk perfumes, deeply embedded in Saudi gifting traditions for holidays and special events.

The success of these local brands highlights a unique opportunity. While global brands often succeed through broad exposure and global marketing muscle, Saudi brands have the potential to thrive through cultural alignment, trust, and authentic storytelling. Honayda, for instance, has gained visibility by participating in Riyadh Fashion Week and designing dresses for members of the Jordanian royal family, including Princess Rajwa and Queen Rania. As consumer awareness deepens, emerging labels like Qormuz, LOCA Beauty, and fine jewelry brand L'azurde are gaining market traction with more modern and accessible ranges and expanding the ecosystem of recognizable Saudi labels.

To capitalize on this momentum, local players must focus on brand visibility, product innovation, and emotional engagement. Strengthening their presence across digital platforms, retail points, and cultural events will be essential to converting awareness into lasting consumer loyalty and positioning Saudi brands not just as local favorites but as regional and global contenders.



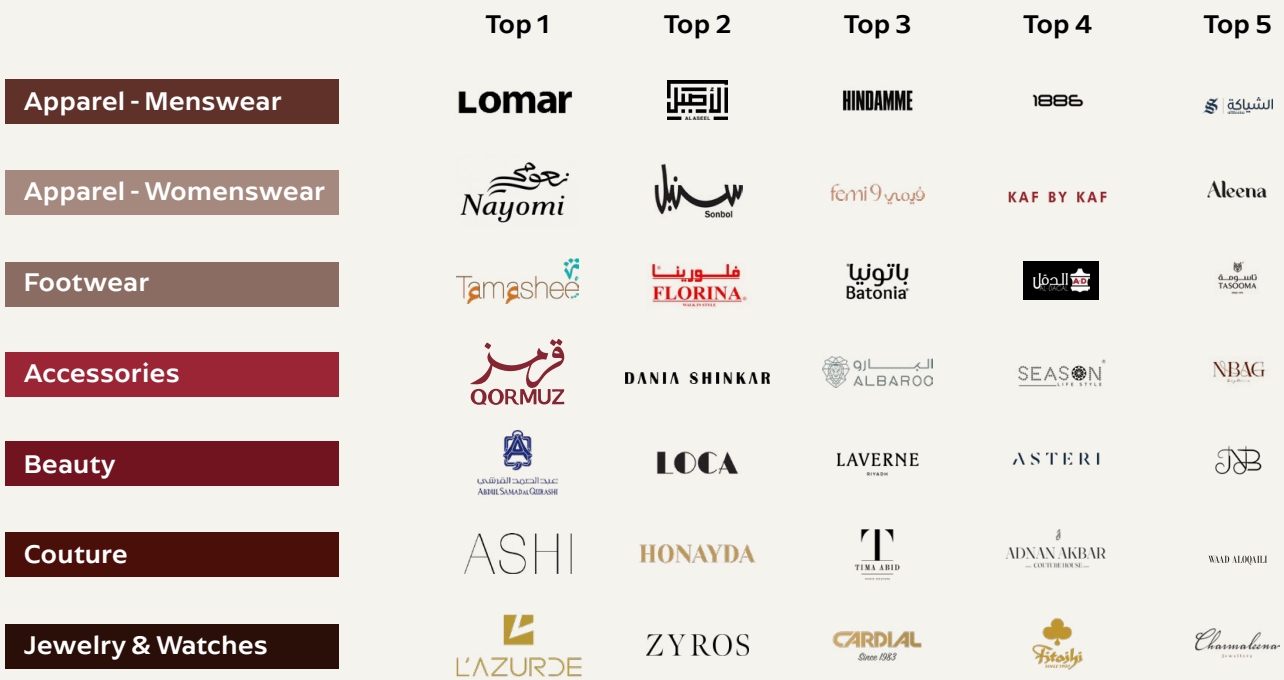


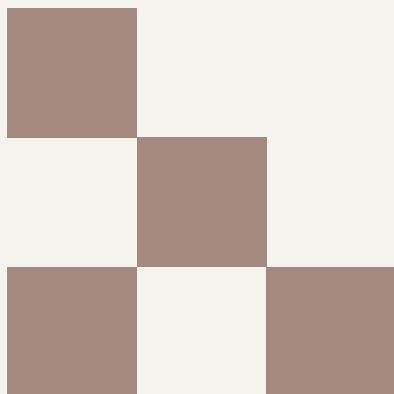
FIGURE 12
Top-of-Mind Saudi Brands Among Saudi Consumers³

Easing Entry: Regulatory Reforms and Local Partners

A critical pillar enabling the fashion retail surge is Saudi Arabia’s deliberate improvement of its business climate. In recent years, authorities have introduced regulatory reforms to make market entry and operations easier for foreign companies. One major reform, although not among the most recent, was the decision to allow 100% foreign ownership in the retail sector, thus eliminating the previous requirement for foreign brands to partner with a local agent or form a joint venture for store ownership. Additionally, business licensing and permits have been streamlined, with many processes moved online via the Ministry of Investment (MISA) portal. This development has cut red tape for setting up boutiques

or e-commerce ventures. Meanwhile, import tariffs on luxury goods have been kept moderate, and customs clearance processes improved, helping fashion companies manage cross-border inventory.

Beyond general reforms, the Saudi government has introduced specific incentives for the fashion industry. The government has established special economic zones focused on logistics and consumer goods, where brands setting up distribution centers benefit from tax breaks and expedited visa services for foreign staff. These developments are enticing global e-commerce players and large luxury conglomerates to consider Saudi Arabia as a regional hub.





75% of future Saudi fashion professionals seek hybrid careers, blending global experience with homegrown brand development rooted in local culture.

The View from the Next Generation

Amid the rapid growth and localization taking place in Saudi Arabia's fashion sector, the voices of a new generation of fashion students and recent graduates are increasingly influential. These emerging professionals view the landscape as rich with opportunities, blending admiration for the heritage and expertise of global luxury brands with a strong aspiration to develop or support homegrown brands that authentically represent Saudi culture.

Reflecting their ambitions and market understanding, 75% of future fashion professionals indicate a preference for careers that mix local and international experiences.¹⁴ These emerging fashion professionals anticipate building hybrid careers, interning with international brands to learn best practices while simultaneously contributing to local labels or launching independent ventures, thus fostering a mutually beneficial dynamic between global expertise and local creativity.

Aligning with these aspirations and preferences, the recent growth in fashion-related education has led to a wider range of offerings across multiple institutions in Saudi Arabia. Today, programs are equipping graduates with specialized skills in areas such as fashion design, marketing, and merchandising.

04.

CULTURAL HERITAGE: THE FUTURE OF SAUDI STYLE

At the opening ceremony of the Paris 2024 Olympics, Saudi Arabia's delegation attracted attention not just for its athletic prowess but for the athletes' attire, which expressed a seamless blend of tradition and modernity. Male athletes wore the bisht cloak over white thobes while female athletes wore Al-Nashal dresses, all embellished with motifs reflecting Saudi Arabia's ancient history. The outfits, designed by Saudi creative Alia Al-Salmi, touched a global audience and became

a symbol of cultural pride. This striking moment on the world stage highlighted a broader movement in Saudi Arabia's fashion industry: a renaissance of cultural heritage within contemporary style.

In 2025, Saudi Arabia's designers, brands, and regulators are boldly bridging past and present, infusing traditional crafts and cultural identity into cutting-edge fashion. In the process, they are defining a new era of Saudi style.



Reviving Tradition

Heritage crafts are at the heart of Saudi Arabia's fashion revival. Attesting to their importance, Saudi Arabia has officially declared 2025 the 'Year of Handicrafts' in celebration of its rich craftsmanship heritage. This significant move shines a spotlight on age-old artisanal skills from Al-Sadu weaving to Al-Qatt Al-Asiri patterns, highlighting them not as relics of the past, but as living arts. The domestic handicrafts industry is projected to reach USD 1.35 billion by 2028.¹⁵

Across Saudi Arabia, this revival is actively supported by 40 professional crafts associations, collectively empowering over 4,600 registered artisans to ensure that their time-honored techniques remain vibrant and relevant in modern life. Artisans across Saudi Arabia are now benefitting from greater visibility and opportunities, underpinning Vision 2030's ambition of blending heritage with contemporary creativity and economic growth.

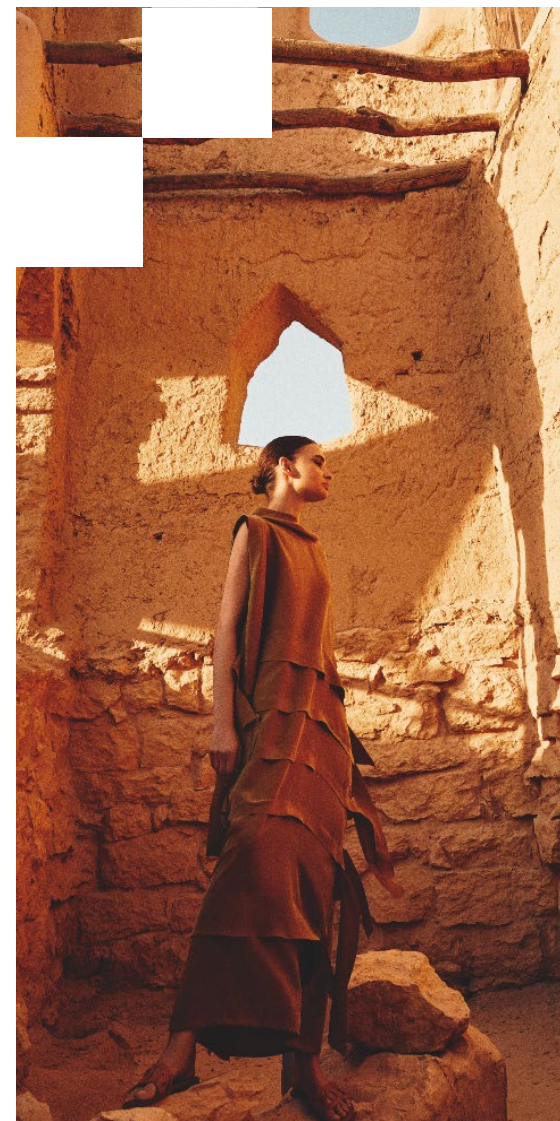
Alongside the Traditional Handicrafts Revival Initiative, the Fashion Commission launched the Saudi Heritage Revival Competition in July 2024. During the competition, participants were tasked with creating unique fashion designs featuring classic Swarovski crystals, artfully integrating elements of heritage with contemporary aesthetics inspired by Saudi culture. The winners' collections drew heavily

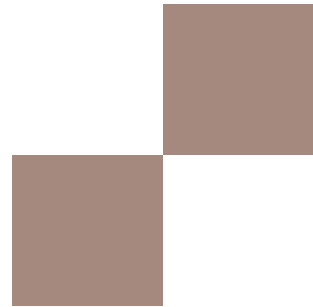
on Saudi heritage, from centuries-old textiles to tribal patterns, while confidently pushing creative boundaries. The second phase is being launched this year with a focus on heritage, handicrafts, sustainability, and the innovative use of Swarovski's reignited crystals.

Building on these efforts to merge tradition with innovation, the Saudi Fashion Commission has also launched another key initiative, the Traditional Handicrafts Revival in Saudi Fashion. Launched earlier this year, the five-day workshop, with experts including Dr. Layla Albassam, drew designers from across the country to reinterpret local handicrafts into high-fashion pieces. Assessed by an expert panel including HRH Princess Nourah Al Faisal and members the Royal Institute of Traditional Arts (Wrth), the competition highlighted 25 talented finalists, with winning designs honoring Saudi Arabia's rich cultural identity through techniques like hand embroidery, natural dyeing, leatherwork, and innovative 3D printing. During the competition finale in Riyadh, the Fashion Commission CEO, Burak Çakmak, noted that the program "Emphasizes Saudi cultural heritage, enhances and preserves Saudi cultural identity, and fosters local talent in creative design."

Princess Nourah Al Faisal, CEO of The Art of Heritage, underscores the importance of such programs, affirming that they mark an important

step in reconnecting designers with authentic heritage knowledge. In particular, she points to the upcoming Misk Heritage Museum 'Asaan', which will house and manage The Art of Heritage collection of 57,000 artifacts and serve as a hub for education and training. The museum will be a game-changing resource to deepen cultural literacy among emerging designers. This kind of institutional access ensures that creative revival is rooted not just in aesthetics, but in understanding and skill.





Nearly four in five consumers are willing to pay more for clothing that supports local artisans.

Blending Past and Present

Saudi Arabia's unique take on fashion is being led by a dynamic cohort of Saudi designers who are giving familiar ready-to-wear garments a heritage-infused update. Designers have reimagined the classic abaya with bold colors and innovative cuts and have crafted menswear that pays tribute to traditional attire like the thobe and bisht in fresh, urbane contexts.

This blending of past and present is not just an aesthetic choice; it is a statement of Saudi Arabia's evolving identity on the global fashion stage.

Recent surveys highlight consumer appetite for modern, heritage-inspired fashion, with nearly four in five consumers (80%) open to paying more for clothing that supports local artisans.³ This underscores the increasing cultural relevance of homegrown design and craftsmanship in shaping Saudi Arabia's fashion future. It also aligns closely with the rise of Saudi brands such as Abadia, an ethical luxury label celebrated for incorporating traditional Saudi crafts, including Al-Sadu weaving and Naqda embroidery, into contemporary fashion. Abadia's collaboration with over 40 local female artisans highlights the sector's increasing commitment to preserving cultural heritage through innovative, modern designs.

How likely are you to pay extra for clothing that supports local artisans and craftsmanship?

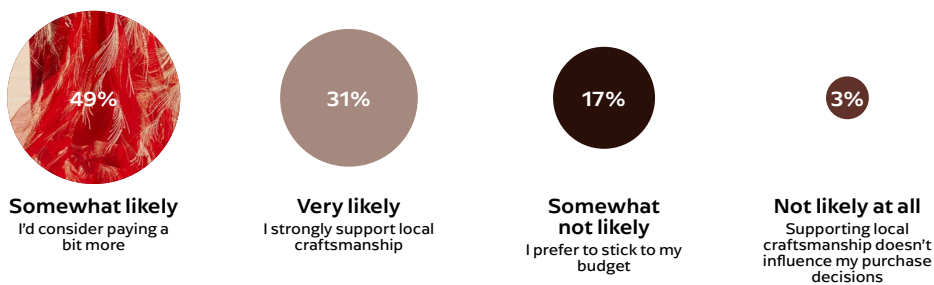
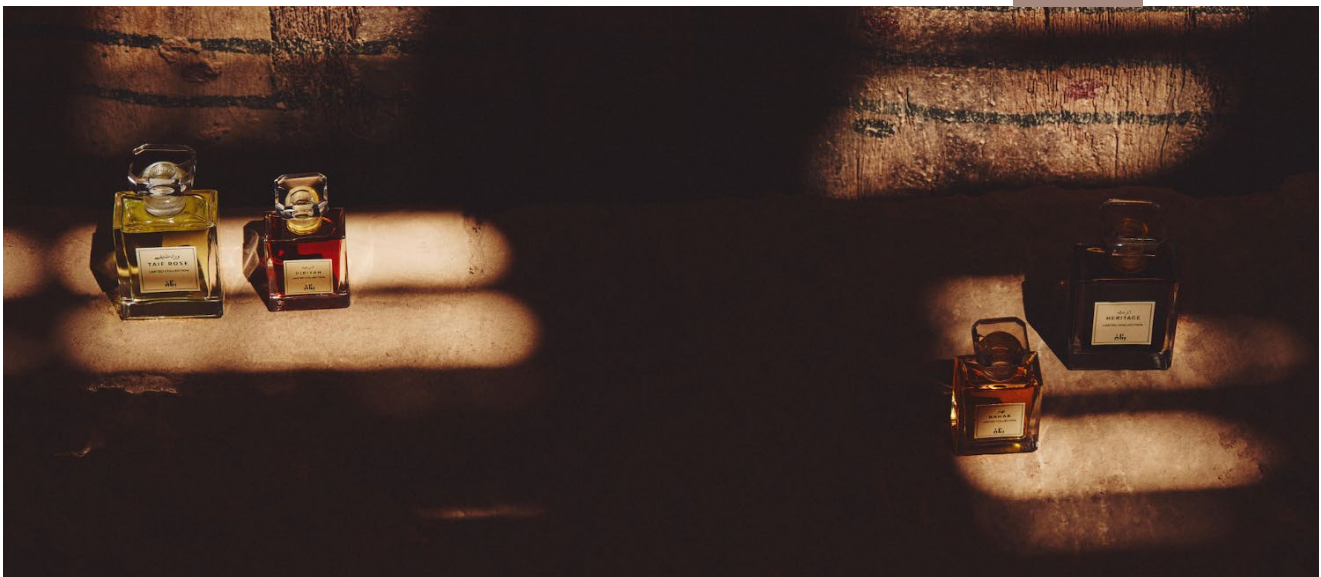


FIGURE 13
Consumer Likelihood to Support Local Craftsmanship Through Fashion Purchases (%)³



“Our heritage is our strength. When we share it with the world on our own terms, the impact is powerful.”

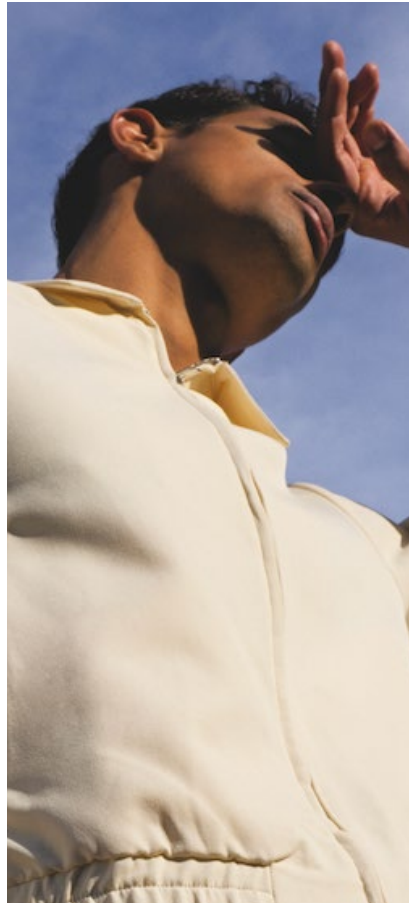
Reem Alkanhal

Reflecting on the growing success of local brands, Saudi fashion designer, Reem Alkanhal, points out how far things have come. “A decade ago, there were few of us, limited infrastructure, and local options. Today, there’s a real ecosystem emerging, one that’s proudly Saudi,” she says. Alkanhal’s own work embodies this transformation. Known for her minimalist yet evocative collections, she reinterprets traditional Saudi elements into fluid, contemporary silhouettes designed to resonate globally. In her celebrated Sword Collection, she distills cultural heritage into clean lines and subtle symbolism, consciously avoiding ornate embroidery

in favor of elegant references that spark curiosity. “It’s about honoring where we come from but expressing it in a way that feels authentic and current,” she explains.

Having presented her designs abroad, Alkanhal represents a new generation of Saudi creatives blending local identity with international appeal. She views cultural heritage not as constraint but as a wellspring of inspiration, and with the growing support of platforms like the Fashion Commission, she sees immense potential ahead. “Our heritage is our strength,” she says. “When we share it with the world on our own terms, the impact is powerful.”

Other industry trailblazers are also bringing Saudi heritage to world platforms. Luxury apparel designer, Hindamme, incorporated Arabic calligraphy and references to historical events into his jackets, and Arwa Al Banawi infuses streetwear with Arabic typography and Bedouin patterns. Such designers embody a new confidence among Saudi creatives, reinforcing the message that traditions are not hindrances but rich inspiration for innovation.



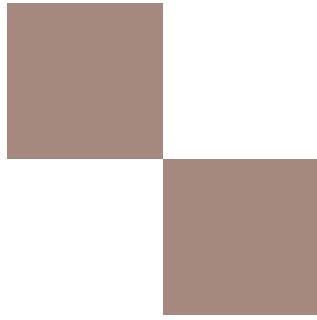
Cultural Identity as a Catalyst for Growth

There is a business case for Saudi Arabia's fusion of cultural heritage with modern fashion. The fashion sector in the Kingdom has expanded rapidly in recent years, with local brands leveraging tradition to differentiate themselves in a crowded market. For Saudi consumers, garments infused with local storytelling, fabric crafted by local hands, or designs evoking historical landmarks hold added authenticity and appeal. In consumer surveys, over 55% of respondents expressed stronger loyalty toward local brands, indicating a sense of pride and commitment to supporting domestic talent.³

This trend represents a unique advantage over global fast-fashion brands, as authentic local storytelling and craftsmanship are inherently irreplicable at scale. Consequently, Saudi designers possess a distinct competitive edge, emphasizing that celebrating heritage isn't a niche endeavor but central to the industry's future trajectory and success.

International brands are increasingly recognizing the commercial value of aligning with Saudi Arabia's cultural identity. For instance, L'Oréal tailors its offering specifically to Saudi consumers by blending global expertise with deep local insights. According to Sanaa Bougazzoul, General Manager of L'Oréal Dermatological Beauty Middle East, this customization starts with product innovation, adapting formulas specifically to local skin types, climate conditions, and prevalent concerns. Additionally, L'Oréal strategically aligns marketing campaigns with culturally significant events, notably Ramadan and Eid, and actively engages Saudi audiences through digital platforms and partnerships with influential local content creators.¹⁶

This cultural sensitivity not only deepens consumer connections but also bolsters market performance, exemplifying how international brands can effectively cater to Saudi consumers by thoughtfully integrating local context and modernity into their offerings.



From a branding perspective, cultural heritage has become a cornerstone of Saudi fashion's value proposition, and government and industry players are capitalizing on this by showcasing Saudi talent on the world stage. During the annual Saudi Cup, guests display a striking blend of cultural heritage and modern fashion, with traditional details seamlessly integrated into contemporary couture.

A Cultural Renaissance in Beauty and Lifestyle

The imprint of Saudi heritage extends beyond clothing, shaping Saudi Arabia's broader creative and consumer landscape. In beauty and lifestyle, Saudi entrepreneurs are preserving tradition while adapting it for modern audiences. For example, oud, the deeply aromatic wood long cherished in the region, remains central to local fragrance identity. Its use in high-end perfumes continues to reflect Saudi Arabia's deep-rooted appreciation for sensory traditions, while also reinforcing the nation's cultural distinctiveness in the global luxury market.

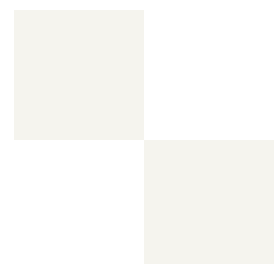
Oriental and oud-based fragrances are estimated to represent a dominant share of the Saudi perfume market, with leading local brands such as Arabian Oud and Abdul Samad Al Qurashi commanding over 20% of total retail value.² Traditional aromas such as oud, musk, and Taif rose carry deep cultural significance, evoking tradition, pride, and a sense of Arab identity. In a literal sense, Saudis are wearing their heritage, whether as a handmade cloak or a few drops of oud oil, and the world is increasingly eager to partake in that experience.

This growing global appreciation is reflected in the launch of internationally acclaimed perfumes inspired by Arabic scents. For instance, Jo Malone's Taif Rose Cologne Intense and Bvlgari's Le Gemme Falkar reinterpret heritage ingredients such as Taif rose, oud, musk, saffron, and spices into luxurious compositions for a global audience. This trend underscores how the allure of Saudi olfactory traditions continues to influence the world of high-end perfumery.

Saudi Arabia's historic beauty secrets are also finding their place in modern product lines. A leading example is Snowwhite Arabia, a luxury skincare brand founded by Saudi entrepreneur, Heba Al-Madani. The brand uses 100% Saudi materials and ingredients to create natural products tailored to local consumers, such as haircare treatments made with extracts from the Sidr tree.

Likewise, Saudi aromatherapy and cosmetics brands are developing modern formulations that incorporate age-old indigenous ingredients such as Sidr honey, frankincense, and dates. The appeal lies in authenticity and efficacy: consumers get the opportunity to connect with ancestral wisdom while enjoying contemporary luxury. Global retailers are responding to this trend; Sephora Middle East now highlights products that draw on regional traditions, from kohl-inspired eyeliners to perfumes named after historical Saudi sites.

Beyond beauty, the broader lifestyle scene, including jewelry, interior decor, and food and beverage, mirrors the growing trend of unifying tradition and modernity. Jewelry designers are reviving Najdi and Hijazi motifs in modern accessories and interior designers weave traditional patterns like Al-Qatt Al-Asiri into modern home décor. High-end restaurants also incorporate design elements from Saudi heritage, such as Sadu-upholstered seating or dishes inspired by traditional pottery, to create a sense of place. Collectively, these trends speak to a powerful narrative: Saudis are proudly infusing their heritage into every facet of daily life and luxury experiences, ensuring the legacy lives on in contemporary forms.



Crafting Global Narratives from Local Traditions

The convergence of cultural heritage and modern fashion is expected to grow stronger throughout 2025. Already this year, Saudi Arabia has participated in Expo 2025 Osaka, showcasing its heritage at a pavilion activation titled 'Handicraft Experiences: A Celebration of Art and Innovation.' The week-long exhibit in Japan drew thousands of visitors and put Saudi identity in the spotlight through modern interpretations of traditional crafts. Among the designs

and innovations on show were vibrant Al-Qatt Al-Asiri patterns painted on palm fronds using natural pigments, and high-tech diffusers scented with Taif rose and juniper.

A recent survey of young Saudi fashion professionals underscores the enduring importance of Saudi heritage, with local craftsmanship and cultural expression emerging as two of the top three trends shaping the future of Saudi style. Such alignment between emerging talent and national initiatives signals more than aesthetic preference, it reflects a deep-

rooted belief in heritage as a driver of innovation. As Saudi creatives continue to bring traditional narratives to global platforms, these showcases affirm Saudi Arabia's cultural identity as a powerful catalyst for economic growth, global dialogue, and creative leadership in the years ahead.

What young professionals say matters most for the future of Saudi fashion.

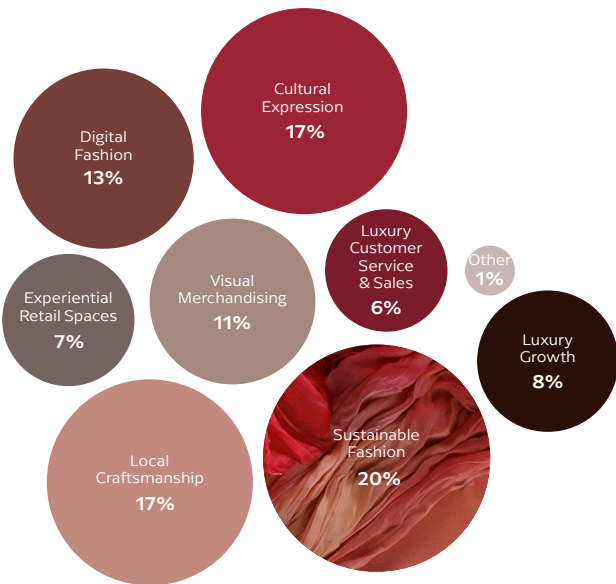
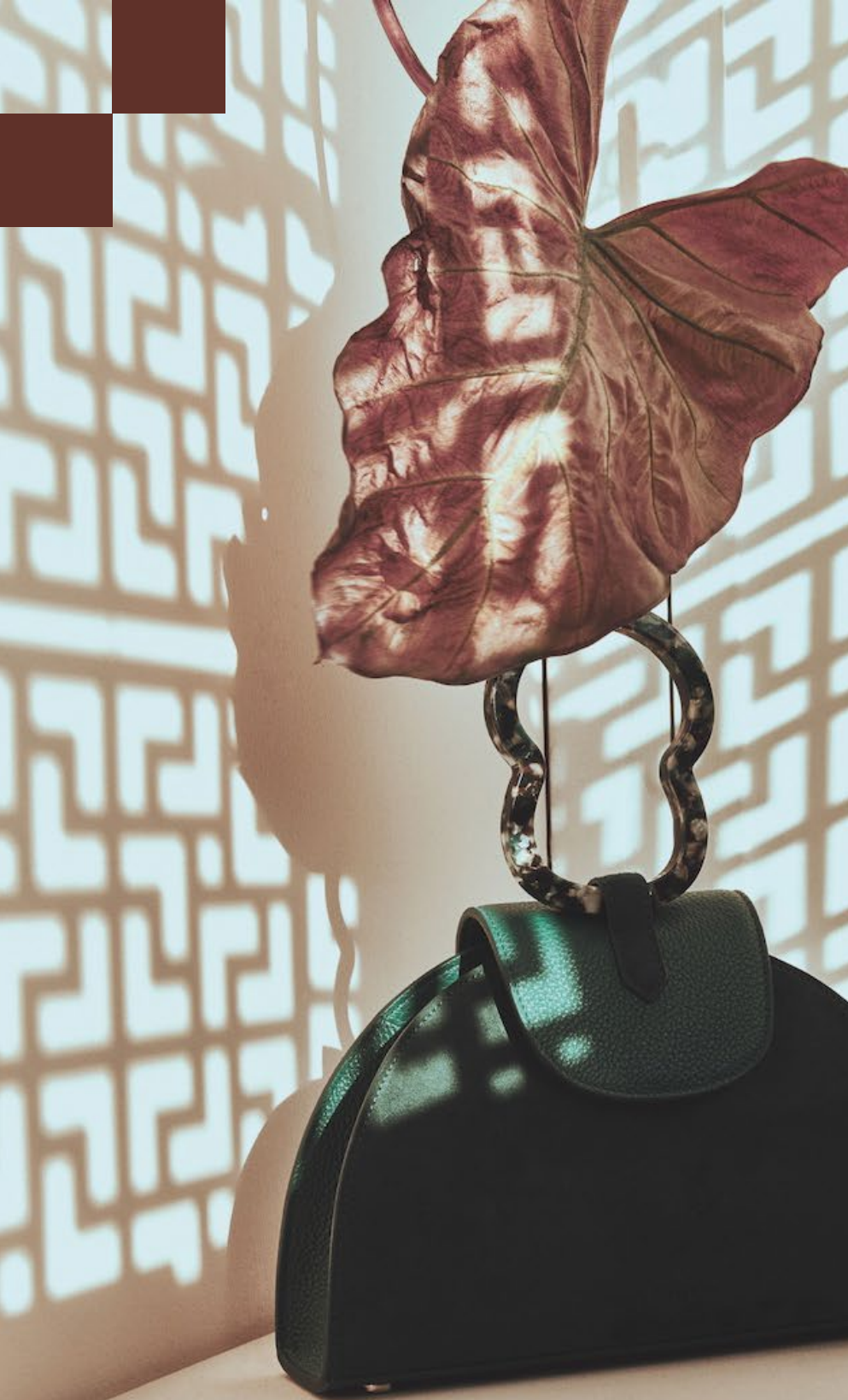


FIGURE 14
Top Emerging Trends in Saudi Fashion: Insights from Young Professionals (%)¹⁴





With 99% internet penetration, Saudi Arabia is embracing a future where digital innovation and physical retail co-exist through immersive, omni-channel fashion experiences.

05.

OMNI-CHANNEL AND DIGITAL ENGAGEMENT

As Saudi Arabia positions itself as an innovator in fashion, the sector is undergoing profound digital transformation in line with Vision 2030's drive to modernize the economy. With a connected and tech-savvy consumer base, this evolution is a natural progression, but it meets head on with Saudi Arabia's enduring passion for in-person shopping. This dynamic has given rise to omni-channel strategies that blend online and offline touchpoints as brands adapt to meet Saudi shoppers wherever they are.

From surging e-commerce adoption to experiential malls and social media-driven trends, Saudi Arabia is embracing a future where digital innovation and physical retail co-exist. The result is a fashion market that is evolving rapidly in how brands engage consumers, deliver services, and build loyalty. Nisha Jagtiani, Director of UAE-based omnichannel retailer, Landmark Group, emphasizes the role of digital innovation complementing physical retail: "Our investment in digital platforms, loyalty programs, and omni-channel experiences reflects the growing digital engagement and personalized shopping preferences among Saudi consumers."¹⁷

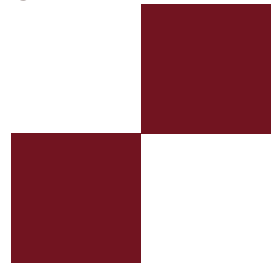
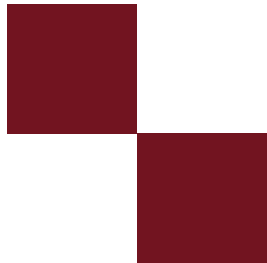
E-Commerce Is Rising, But not at the Expense of Stores

The Saudi government’s push for a digital economy has set the stage for robust e-commerce expansion. Internet penetration has reached 99% in Saudi Arabia, and nearly all adults use smartphones, creating a ready base for online retail. In fashion, online sales have skyrocketed.¹⁸ Saudi Arabia’s fashion e-commerce market was valued at approximately

USD 3.8 billion
in 2023, rising to
USD 4.4 billion
in 2024

and is projected to exceed USD 7.6 billion by 2029.¹⁹ Half of respondents reported buying most of their fashion online, while 35% said they leaned more toward in-store.³

These preferences reflect strong growth momentum driven by digital adoption, shifting consumer behavior, and expanding online retail infrastructure. However, for those who continue to shop in-store, certain experiential factors, such as customer service quality and product merchandising, remain influential in shaping their physical shopping preferences.³



Customer service quality and product display/merchandising are the top priorities for Saudi consumers when shopping in physical fashion stores.

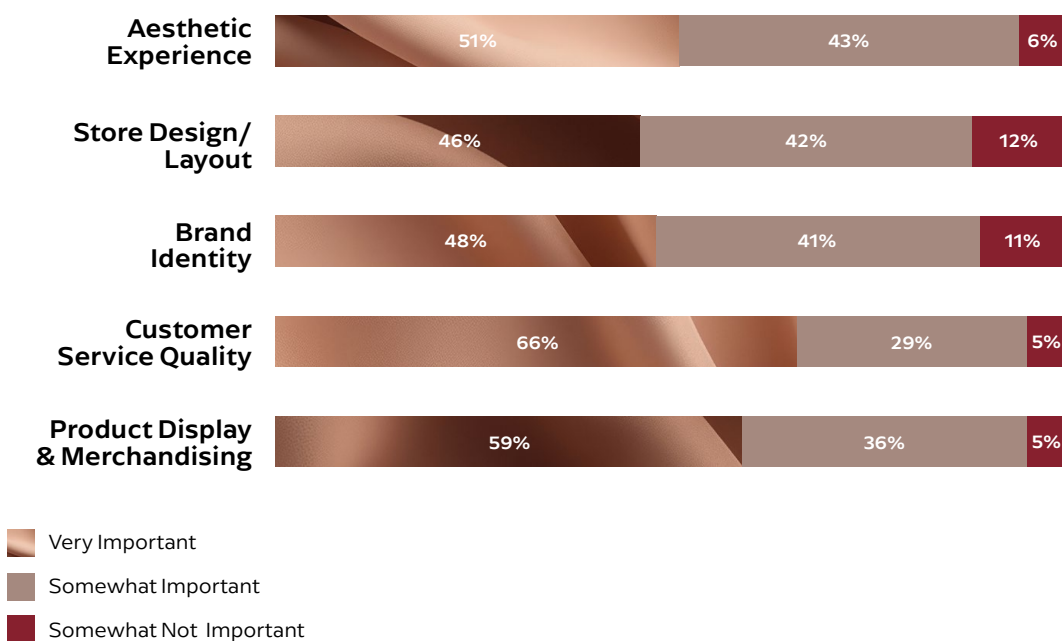


FIGURE 15
Key In-Store Factors Influencing the Physical Fashion Shopping Experience (%)³



Despite the rise of e-commerce, Saudi consumers remain deeply connected to mall culture. In a country where malls serve as social hubs and leisure destinations, shopping is more than a transaction, it is a lifestyle and form of entertainment. This cultural preference ensures that physical retail not only endures, but continues to thrive alongside online shopping.

The strength of Saudi mall culture has made the retail sector relatively resilient to the e-commerce onslaught seen elsewhere. Saudi mall operators note that local customers are not abandoning physical stores as quickly as they are in some other markets. While online fashion sales grow in double digits, many consumers still prefer to touch and feel products before they buy. For Saudi consumers, this is particularly true for categories like fragrance and makeup, where trying the item is part of the buying ritual.

How comfortable are you purchasing the following fashion and beauty items online?

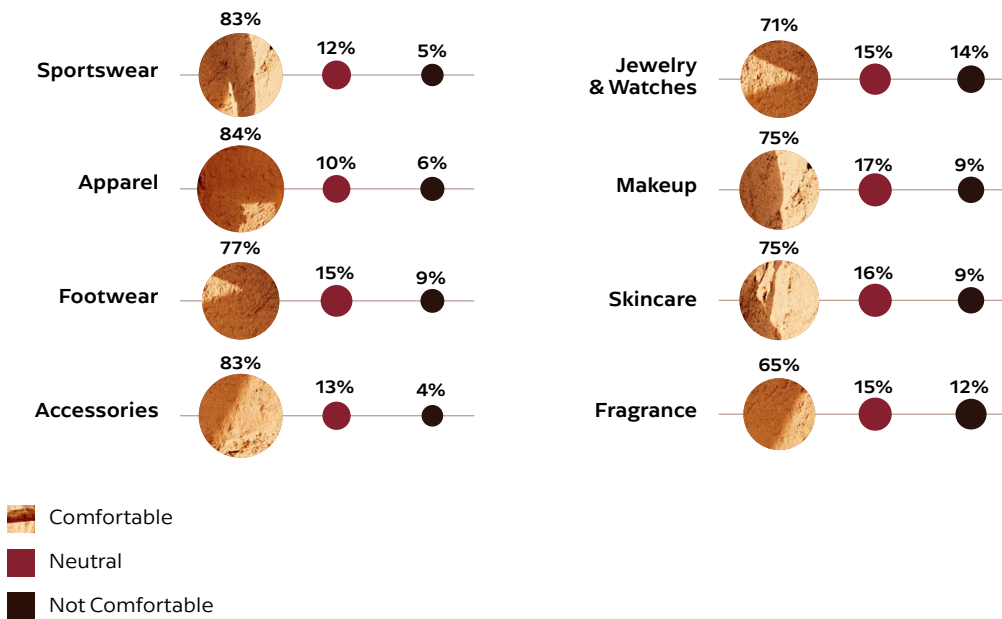


FIGURE 16 Online Shopping Comfort Levels Across Fashion and Beauty Categories (%)³

However, malls are not overlooking the growing influence of digital commerce. Virtually every major retailer and brand has launched local online stores or apps, reflecting a 'brick-and-click'

model. This trend reinforces a new reality: today's consumers want both the convenience of online shopping and the tactile, immediate gratification of in-person shopping, depending on the context.

Why Omni-Channel, Why Now?

Saudi shoppers comfortably use multiple channels. They expect a seamless journey whether they are scrolling through a mobile app at home or browsing in-store at their favorite shopping destination. Ubiquitous digital adoption is a major factor in this development. In 2024, 79% of all retail transactions across sectors involved cashless electronic payments, indicating comfort with digital commerce infrastructure.⁵ In addition, consumer behavior often blends channels: a customer might discover a fashion item on Instagram, check its availability on a website, and then try it on in-store before purchasing, or they may see an item in-store and buy later online. Retailers therefore recognize that online and offline are complementary, not an either-or proposition. This duality is the foundation of omni-channel strategy in Saudi Arabia.



As income rises, Saudi consumers shift their high-value fashion purchases away from mass market aggregators toward brand-owned online stores and social commerce, with high-net-worth individuals spending more on direct brand channels (31%) than aggregators (29%).

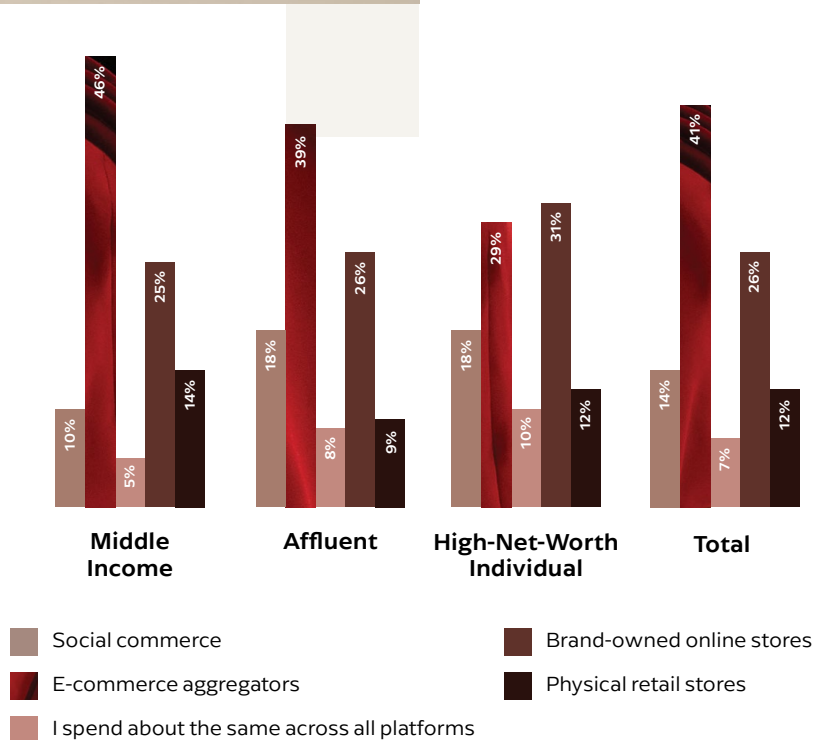


FIGURE 17 Fashion Purchase Spending by Platform and Income Segment (%)³



Across the Kingdom, there is a common pattern of consumers carrying out online research before buying in a physical store, and retailers have responded by ensuring their online channels complement the store experience. For example, many retailers enable real-time inventory checks in nearby stores or offer click-and-collect services and easy in-store returns for online purchases. Over the past year, several leading fashion chains in Saudi Arabia have rolled out click-and-collect at dozens of branches, recognizing that many shoppers appreciate the convenience of online

ordering and instant pickup without the need to wait for delivery.

Online fashion and beauty sales in Saudi Arabia are set to witness strong momentum, rising from USD 4.4 billion in 2024 to an estimated USD 7.6 billion by 2029. This growth reflects an increase in online sales from 13% to 19% in terms of share of the total fashion and luxury market. This highlights a steady shift toward digital consumption fueled by young, tech-savvy consumers, improving retail standards, and expanding digital infrastructure.¹⁹

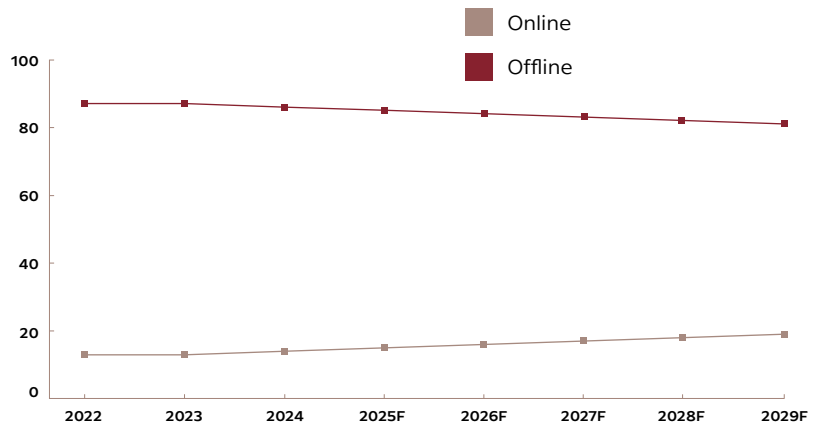


FIGURE 18 Online Versus Offline Fashion Sales Share in Saudi Arabia (2022–2029)¹⁹

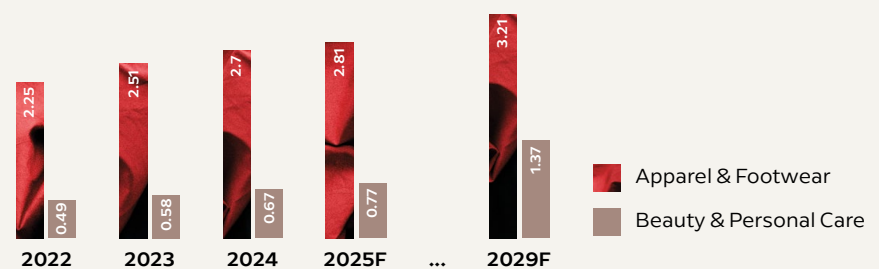


FIGURE 19 Retail E-Commerce Sales by Product Category in Saudi Arabia, USD B²

Social Media, the Disruptor

On Saudi Arabia's omni-channel landscape, social media plays an outsized role in fashion engagement. The Kingdom boasts one of the world's most active social media populations, particularly when it comes to Gen Z, with platforms like Instagram, Snapchat, TikTok, and X acting as virtual runways and market forums that heavily influence purchase decisions. Today, young consumers scroll through influencer posts, brand lookbooks, and style videos to discover the latest trends. A strong majority (81%) of survey respondents say it is important that brands reflect the latest fashion trends seen on social media, reinforcing the critical role of platforms like TikTok and Instagram in shaping purchase expectations.³

TikTok and the New Generation:

TikTok has surged in popularity in Saudi Arabia, creating fashion micro-trends overnight. Local designers and boutiques use the short video app to showcase styling tips or 'get ready with me' clips, often leading to products going viral and selling out. Instagram and Snapchat remain particularly strong in the Saudi market and brands leverage these platforms for quick content and augmented reality (AR) filters. For instance, a luxury brand might offer an AR lens for users to virtually try on a new handbag or pair of sunglasses. In parallel, Instagram continues to be the platform of choice for established fashion influencers and brands' official marketing, given its visual focus. The result is a social commerce ecosystem: consumers not only gain inspiration from these platforms but also buy through them, whether via swipe-up links, integrated shopping tabs on Instagram, or links in bio directing to e-commerce sites.



TikTok is the top discovery platform for new beauty products at 51%, followed by peer recommendations (43%) and Instagram (40%), confirming the powerful role of short-form video and social trust in shaping beauty awareness and purchase intent.

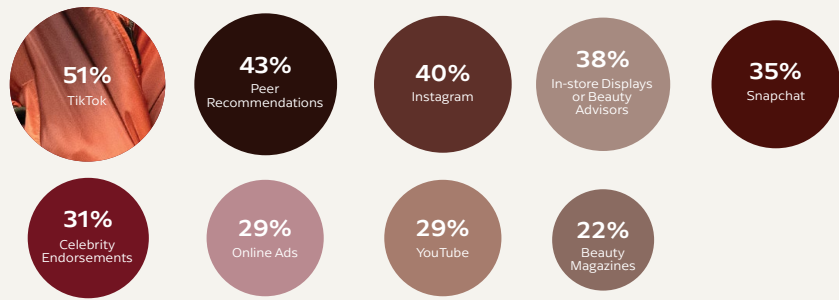


FIGURE 20
Top Discovery Channels for New Beauty Products Among Saudi Consumers (%)³

Influencers as Key Intermediaries:

With social media acting as a powerful platform, Saudi Arabia’s fashion influencer economy has grown into a dynamic industry. Hundreds of influencers now serve as trendsetters and brand ambassadors with sway over Gen Z and young millennials who trust and relate to an influencer’s fashion recommendations rather than a generic ad

campaign. Recognizing high engagement levels, brands have increasingly allocated marketing budgets to influencer collaborations, with campaigns ranging from paid Instagram posts to YouTube reviews and co-branded fashion lines. Advertising spending on influencer marketing is projected to reach USD 95 million this year and USD 139 million by 2029,¹⁹ growing at a CAGR of 10%.

This points to both increasing trust in the return on investment (ROI) of influencer partnerships and the sheer multiplication of content creators in Saudi Arabia. Saudi’s creator economy reportedly grew over 30% in early 2025 alone, fueled by rising influencer marketing and content-driven commerce.²⁰

Product unboxing and reviews are the most motivating influencer content type for beauty and fashion purchases (55%), followed by styling tips and giveaways (both at 47%). This indicates a clear consumer preference for authentic, value-adding formats over standard promotional posts.

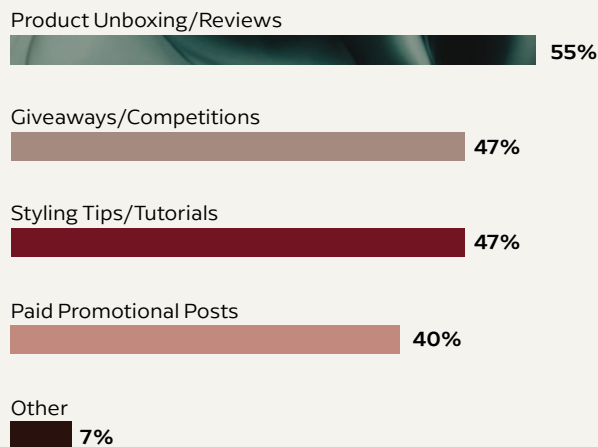


FIGURE 21
Most Impactful Influencer Content Formats for Driving Beauty and Fashion Purchases (%)³

Blending Online and Offline: Omni-Channel Strategies in Action

Personalization across channels:

Omni-channel engagement in Saudi Arabia is increasingly powered by personalization, especially for younger and affluent consumers. Retailers use loyalty data and insights into online behavior to customize digital and in-store experiences. Mobile apps highlight relevant styles, like fashion tailored for abaya

buyers or streetwear for Gen Z men, while in store, loyalty program check-ins enable staff to offer tailored advice.

On the personalization front luxury brands excel, maintaining client profiles to send personalized lookbooks and event invites. Mass-market players are also evolving, with department stores sending Arabic and English emails or SMS featuring style suggestions based on browsing history, making every touchpoint more relevant and engaging. An overwhelming 81% of Saudi consumers prefer personalized marketing content over generic messaging, highlighting the importance of tailoring communication to individual interests to drive engagement and conversion in Saudi Arabia's fashion and beauty market.³



An overwhelming 81% of consumers prefer personalized marketing content, signaling demand for curated, relevant brand interactions.

Concept Stores and Immersive Experiences

further trend that straddles the online and offline worlds is concept stores that blend curated, lifestyle-driven shopping with community and social media appeal. In Saudi Arabia, concept stores often feature local designers, themed decor, cafés, and art corners, creating immersive customer experiences. Their hybrid nature, which is part boutique, part cultural hub,



combines physical retail with digital engagement and community-building.

The scene is rapidly expanding, particularly in Riyadh and Jeddah. More than 20 concept stores are estimated to operate across major cities, with new ventures emerging as Saudi's creative and consumer economies evolve. In Riyadh, standout names include Wecre8, Concept by Weaver, The Pop Up, Pattern, Personage, Peerless, and Electric, each offering a blend of fashion, lifestyle, and art. Jeddah's vibrant scene features Homegrown Market, Urbn Lot, Boutique 7, Mood & Bloom, and Hub271.2, among others. Smaller but influential players like Aura in AlUla and The Corner in Alkhobar demonstrate how the trend is expanding beyond metropolitan centers.

Homegrown Market in Jeddah exemplifies the concept store trend. A flagship store in the Kingdom, it showcases over 200 Saudi and regional brands across fashion, accessories, and home decor. It functions as both an incubator and a retail platform, providing logistical and promotional support to emerging designers. With its in-house café and a steady stream of pop-up events, Homegrown draws a loyal, style-conscious youth audience that values creativity as much as commerce.

Community and Loyalty:

The growing presence of concept stores in Saudi Arabia underscores the power of community-building in modern retail. By hosting workshops,

styling sessions, designer meetups, and creative talks, these stores foster an emotional connection with their audience. This sense of belonging drives repeat visits and brand loyalty, something that pure e-commerce platforms often struggle to replicate. For a generation seeking authenticity, participation, and cultural resonance, concept stores offer a compelling and enduring retail model.

To summarize, Saudi Arabia's fashion sector is skillfully navigating the intersection of rapid digital advancement and a deeply ingrained retail culture. With near-total internet penetration, surging e-commerce adoption, and highly active social media users, the Kingdom is primed for digital transformation. However, the enduring appeal of malls, driven by social experiences and tactile preferences, is ensuring that physical retail continues to thrive. Leading brands are strategically responding with integrated omni-channel models that seamlessly blend online convenience with immersive offline experiences, leveraging personalized digital touchpoints and influential social media trends.

As Saudi Arabia progresses on the Vision 2030 journey, brands that master this digital-physical synergy will capture consumer loyalty, drive growth, and define the future of fashion retail in the Kingdom.

06.

ROBUST RETAIL LANDSCAPE AND INFRASTRUCTURE: THE KEY ROLE OF MALLS

The previous edition of The State of Fashion Sector in Saudi Arabia report (2024) highlighted how Saudi Arabia's fashion market was deeply shaped by its mall-driven retail infrastructure. Last year, over half of the nation's fashion spending was concentrated in the three cities of Riyadh, Jeddah, and Dammam, with malls serving not only as commercial hubs but also as key lifestyle and social destinations. As stated in the 2024 report, the top five mall operators (Cenomi, Al Othaim, Hamat, Alandalus, and Kinan) collectively accounted for one-third of organized retail space, with fast fashion dominating floor space. Meanwhile, luxury retail, though growing, represented just a small fraction (3%) of the market, driven largely by mono-brand boutiques, where a single brand has its own store, in select high-end malls.

The 2025 edition of the State of Fashion Sector in Saudi Arabia report demonstrates how the Kingdom's retail infrastructure is evolving to meet rising consumer expectations and the demands of Vision 2030. It examines the ongoing construction boom in mega malls, next-generation malls, shifts in consumer behavior, the balance between mass-market and luxury retail, the emergence of pop-ups and concept stores, and the growing inclusivity of community-centric retail formats.



Malls: The Heart of Saudi Retail and Culture

Public and private developers in Saudi Arabia are aggressively building new malls to boost capacity and quality, with organized retail gross leasable area (GLA) in major cities on track to double by 2030, fueled by giga-projects and modern shopping centers. New developments aim to surpass existing regional benchmarks, featuring cutting-edge architecture, better traffic flow and parking access, and an elevated tenant mix. As a result of these efforts, financiers and investors are gaining confidence; sentiment around funding large shopping centers has improved, as strong demand and government support reduce perceived risk.

Rapid development and upgrading of Saudi Arabia's mall offering highlights the enduring importance of shopping malls to the retail landscape.

According to Landmark Group's Nisha Jagtiani, "Physical stores continue to remain a vital part of the retail experience. Stores are being upgraded with modern layouts and convenience features that resonate with evolving customer expectation."

Mall dominance in Saudi Arabia is also evident in sheer retail footprint. In Riyadh, approximately two-thirds of all retail space is found in malls and Jeddah similarly centers its shopping around malls. While e-commerce is growing, it remains relatively underpenetrated with brick-and-mortar venues continuing to capture the vast majority of consumer spend. The continuing appeal of Saudi Arabia's malls aligns with long-standing characteristics of the Kingdom's leisure landscape. In a country where outdoor entertainment options were historically limited, air-conditioned malls have long been considered family destinations, blending shopping with dining, cinemas, and play areas. Today, this comprehensive offering is enhanced and reinforced by curated experiences that online channels cannot match.

Organized retail space in major cities is on track to double by 2030, driven by giga-projects and modern malls surpassing regional benchmarks.

Nearly two-thirds of Riyadh's retail space is in malls, highlighting their central role in Saudi Arabia's fashion landscape.



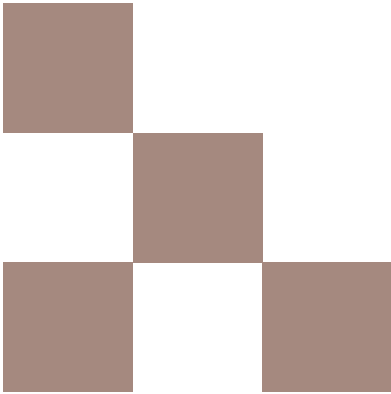


Balancing Mass- Market and Luxury Retail

Malls must cater to a broad spectrum of visitors from value-focused families to ultra-high-net-worth shoppers. As such, there is a need to balance mass-market and luxury retail under one roof. In practice, this means that large 'power malls' anchor fast fashion chains, mid-range brands, and department stores in high-traffic areas, while carving out exclusive wings or sections for luxury boutiques. Mass-market retail dominates in terms of floor space, footfall, and sales volume, with top mall operators like Cenomi and Al Othaim emphasizing global fast fashion brands and big-box anchors, which collectively occupy a significant share of their GLA.

Within Saudi Arabia's key retail enclaves, major luxury houses from Louis Vuitton to Chanel are already present through mono-brand boutiques while some top-tier names remain absent as they reportedly await flagship locations that align with their brand standards. Upcoming high-end developments such as Jawharat Riyadh, The Avenues, and the recently opened Solitaire mall, are being positioned to attract these selective entrants, further expanding the Kingdom's luxury retail landscape.





Inside the Mall: Category Mix and Formats

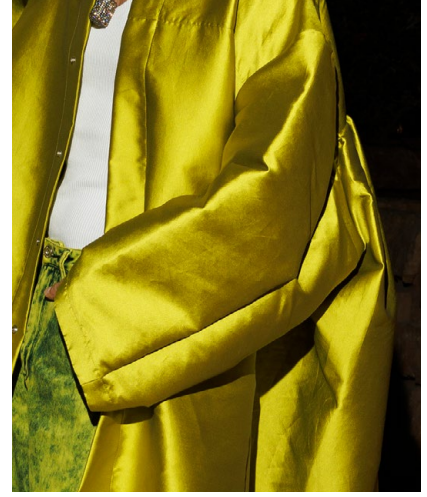
A deeper dive into mall dynamics uncovers interesting patterns in terms of product category share and retail formats:

Fragrance and Beauty:

Beauty and personal care accounts for a disproportionate share of Saudi retail, with the beauty/fragrance category often rivaling apparel in count of stores. This reflects consumer spending patterns; Saudis often spend generously on perfumes, cosmetics, and personal grooming, making the category a key revenue driver. Culturally, fragrances are particularly highly prized. Mall corridors are filled with perfume boutiques, including a mix of international brands like Chanel and DIOR Beauty and local or regional houses such as Arabian Oud or Abdul Samad Al Qurashi. Notably, Saudi Arabia dominates the GCC fragrance market, accounting for 57% of the sector, followed by the UAE at 17% and Kuwait at 9%.

Fashion:

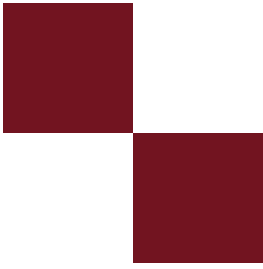
From apparel to accessories, fashion still counts as the largest category by floor space, with stores ranging from fast fashion chains such as Zara, H&M, and local favorite Centrepoin, to high-end designer boutiques in luxury wings. Footwear and accessories also occupy significant floor space, taking the form of sneaker stores, handbag boutiques, and jewelry and watch retailers.



In terms of retail formats, Saudi malls encompass a broad mix. Mono-brand boutiques account for the dominant share in the mid- to high-end fashion category. Meanwhile multi-brand stores are fewer in number but likely to grow as the market matures. These include department stores such as Harvey Nichols and smaller multi-brand boutiques. For their part, category-specific multi-brand stores such as Foot Locker for sneakers and beauty retailers like Sephora and Faces are well established.

Pop-ups and concept stores are also becoming increasingly common, especially around events or seasonal promotions. In Riyadh Season or Ramadan, malls host pop-up markets and luxury brands operate temporary pop-ups for special collections. One example is the Ana Arabia exhibition, which featured 250 designers at Via Riyadh last year. This trend is seeing malls evolve into enablers for scaling emerging Saudi labels by creating buzz and allowing them to test the waters. In response, developers are now designing flexible spaces in malls to accommodate and facilitate pop-ups and experiential retail.





Mega-Projects: Elevating the Retail Landscape

As the retail landscape and consumer demands grow in complexity and sophistication, Saudi Arabia's pipeline of related projects is potentially transformational. Dozens of new malls and mixed-use projects are underway, aiming to position the country as a premier shopping destination in the Middle East. Some of the most significant projects set to reshape the retail map include:

Solitaire (Riyadh)

A 65,000 m² GLA upscale mall, Solitaire opened in 2024 and is positioned as Riyadh's newest luxury and lifestyle destination. In a short space of time, Solitaire has attracted a slate of iconic luxury brands and unique dining/entertainment concepts, signaling strong market appetite for high-end retail (detailed in the case study below).²¹

Diriyah Square (Riyadh)

Diriyah Square is an open-air, luxury 'high street meets mall' concept within the historic site of Diriyah. Due to open by 2028, it will offer around 180,000 m² of retail, including over 400 stores with flagships of 50 of the world's top luxury brands. Diriyah Square integrates indoor mall sections with outdoor souq-style avenues reminiscent of Paris' Champs-Élysées, all tied together with heritage architecture. The upscale concept is positioned as a luxury and culture destination, leveraging the UNESCO heritage backdrop to create an emotional home for brands to connect with the local Saudi community.¹²

Jawharat (Riyadh, Jeddah)

Twin flagship malls by Cenomi Centers, Jawharat Riyadh and Jawharat Jeddah are set to open in early 2026 and late 2025, respectively. Jawharat Riyadh will span approximately 150,000 m² of retail GLA and host more than 350 stores, including 60+ high-end boutiques located within a dedicated luxury district.²²



The Avenues - Riyadh

A mega-mall joint venture by Kuwait's Mabaneer and local partners, The Avenues - Riyadh is set to open in 2026, boasting a colossal 400,000 m² of GLA and ~1,300 stores, making it one of the largest malls in the world by store count. The destination will be designed as a mini city with themed districts (e.g. family zone, luxury zone). In addition to retail, it will feature a mix of four- and five-star hotels, serviced apartments, medical facilities, and office space. With its scale and all-encompassing offerings, The Avenues - Riyadh aims to be both a shopping and leisure tourism hub, capturing regional visitors who might otherwise fly to Dubai or elsewhere.²³

Qiddiya Retail (Riyadh)

Part of the expansive Qiddiya entertainment city being built outside Riyadh, Qiddiya Retail

(often referred to as Qiddiya Mall) will be integrated into the city's theme parks, hotels, and sports facilities. Details are still emerging, but the project is expected to be a next-generation leisure retail complex, possibly with outlet-style shopping and experiential concepts. The development's theme park and motor sports attractions are scheduled for completion in 2027-2028, and the destination is ultimately expected to serve millions of visitors, with Qiddiya's retail component playing a key role in lengthening the duration of visitor stays. The project underscores the trend of retail+entertainment at city scale.²⁴

With an ambitious retail pipeline, Saudi Arabia is well-positioned to become the region's next retail powerhouse, rivaling or surpassing key competitors. However, the challenges are significant:

Filling Vast Mall Spaces:

Several top names are holding off on long-term commitments until new developments prove themselves, yet without flagship anchors like LVMH or Chanel, some projects risk delays or cancellation. To address this, the government is stepping in, offering incentives and facilitating brand relationships through the Ministry of Investment, the Fashion Commission, and Vision 2030 initiatives.

Differentiation:

To minimize the risk of overlapping in terms of retail offering, mega-mall developers are crafting distinct concepts from open-air heritage themes to all-in-one leisure hubs.

Execution and Integration:

The success of retail projects hinges on phased execution and seamless integration with infrastructure like the Riyadh Metro.



Case Study: Solitaire, Riyadh – A New Benchmark in Luxury Retail

Solitaire mall is a clear example of Saudi Arabia's next-generation take on retail centered on experiential luxury and sustainability, reflecting the Kingdom's broader Vision 2030 goals for sustainable urban development. This landmark destination represents the future of luxury retail and living, blending elegance and environmentally conscious design. Opened in Riyadh in early 2025 with a GLA of over 65,000 m² and a built-up area (BUA) of 250,000 m² the mixed-use lifestyle center has quickly garnered favor among luxury shoppers. Solitaire's concept departs from the typical big-box mall format, offering an indoor-outdoor experience with partially open-air retail streets, plazas, and an elevated roof garden, all designed with the aim of promoting social engagement.

In its first few months, Solitaire attracted a roster of top-tier luxury brands, with many choosing the destination to launch their flagship Saudi stores. The mall's two-level galleria hosts boutiques for Louis Vuitton, Chanel, Dior, Valentino, Celine, Prada, Saint Laurent, Balenciaga, Fendi, and more. In the jewelry and watch category, Cartier, Chaumet, Van Cleef & Arpels, Bvlgari, Buccellati, Damian, Jaeger-LeCoultre, and IWC are all present. Several of these well-known luxury names were not previously included in Riyadh's retail portfolio signaling that Solitaire has successfully appealed to brands with a reputation for expanding cautiously.

By assembling the 'who's who' of luxury under one roof, Solitaire has effectively created a one-stop luxury district. This convenience and critical mass are huge draws for affluent shoppers who, until recently, had to travel abroad to access their favorite brands.



Michael Chalhoub, CEO of Chalhoub Group, remarked that “The opening of our flagship stores at Solitaire Mall marks a pivotal step in our shift toward experience-led retail tailored to Saudi consumers. By curating a portfolio that blends heritage, innovation, and exclusivity, Solitaire sets a new benchmark for luxury in the Kingdom.”⁹

Solitaire’s rise reflects the growing maturity of Riyadh’s luxury market and indicates that the city can now sustain multiple high-end retail destinations beyond long-

standing hubs like Kingdom Centre and Centria Mall. Its success not only helps repatriate luxury spending that once flowed abroad but also demonstrates luxury brands’ deeper commitment to Saudi Arabia, with many offering localized, Saudi-exclusive experiences.

For investors and developers, Solitaire validates demand for quality and offers a compelling model, blending upscale retail with leisure, wellness, and distinctive design. It also contributes to reshaping

Riyadh’s luxury geography by drawing affluent shoppers to the city’s northern corridor, supporting broader urban development goals.

Having received global recognition even before its opening, including commendation at the 2022 RLI Awards and the ‘Most Anticipated Opening 2024’ title at the 2024 RLI MENA Awards, Solitaire is emerging as a prototype for future malls in Saudi Arabia: experiential, culturally resonant, and economically impactful.²¹



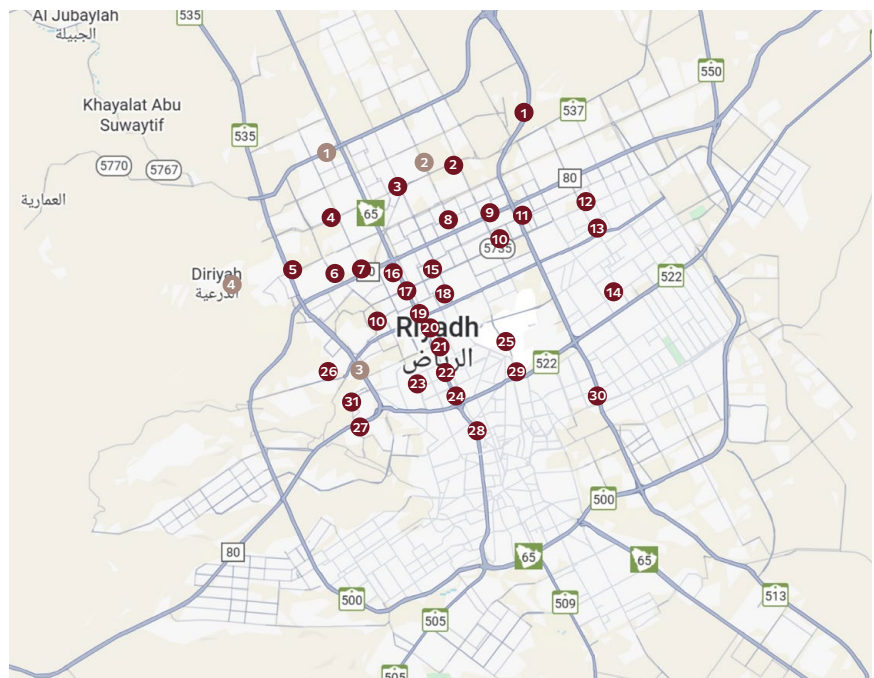
Urban Flagships Versus Community Retail: A Two-Pronged Expansion

As Saudi Arabia navigates the challenges and opportunities shaping the retail landscape, a dual growth path is developing, with spectacular urban flagships on the one hand and a proliferation of smaller community-centric retail options on the other. The former are concentrated in Saudi Arabia's world-class retail districts and up and coming megaprojects where they aim to capture tourism and high-end domestic demand. The latter involves a quieter yet important expansion of community malls and high-street formats to serve local neighborhoods and secondary cities.

Community Malls:

With a typical footprint of 25,000 m² GLA, community malls have been the cornerstone of Saudi retail, especially outside downtown hubs. Riyadh has more than 35 community malls scattered across its districts, usually anchored by a supermarket or hypermarket and a mix of convenience retailers that cater to everyday needs and family outings for nearby residents. Developers like Al Othaim and Jarir have specialized in this segment. Now, in 2025, there is a push to modernize community malls to keep them relevant as bigger venues raise consumer expectations. Modernization efforts might include incorporating more entertainment such as small

play zones and casual dining patios and carrying out aesthetic upgrades. Beyond community malls, high-street retail integrated into new housing developments is also transforming the concept of retail infrastructure at the community level, ensuring that even as giant malls rise, hyper-local retail thrives.



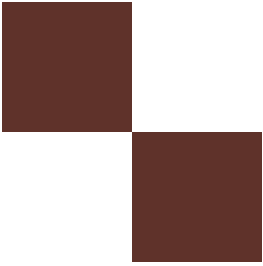
Major Existing Malls

- 1 The Avenues
- 2 Mall of Saudi
- 3 Jawharat Riyadh
- 4 Diriyah Square

Upcoming & Notable Projects

- 1 Roshn Front
- 2 Alia Plaza
- 3 Solitaire
- 4 Almkan Mall
- 5 Thaghr Plaza
- 6 The Boulevard Riyadh
- 7 Riyadh Gallery Mall
- 8 Cenomi Tala Mall
- 9 Levels Mall
- 10 Cenomi Al Nakheel Mall
- 11 Granada Mall
- 12 Atyaf Mall
- 13 Cenomi Al Hamra Mall
- 14 Riyadh Mall
- 15 Hayat Mall
- 16 Riyadh Gallery Mall
- 17 Marina Mall
- 18 Sahara Mall
- 19 Royal Mall
- 20 Al Olaya Mall
- 21 Kingdom Centre
- 22 Centeria Mall
- 23 Panorama Mall
- 24 Al Faisaliah Mall
- 25 Localizer Mall
- 26 Irqah Plaza
- 27 VIA Riyadh
- 28 Riyadh Avenue Mall
- 29 Cenomi The Vue Mall
- 30 Othaim Mall
- 31 1364AH

FIGURE 22 Retail Expansion in Riyadh: Existing and Upcoming Malls¹



High Street Retail:

High street retail, once limited in car-centric Saudi Arabia, is gaining momentum through lifestyle developments like U Walk, The Zone, and the upcoming Diriyah Square, reflecting growing demand for walkable, outdoor shopping environments. While high-end retail clusters in upscale, tourist-driven zones such as Via Riyadh, malls in suburban areas and smaller cities continue to focus on value and fast fashion. Developers are increasingly advised to tailor tenant mixes based on location, with downtown projects favoring experiential and luxury retail, and suburban malls prioritizing essentials and affordability. Outlet malls and specialized retail formats are also expected to grow as the market matures. Maintaining high occupancy remains a top priority, with chain tenants anchoring community malls, though recent trends show rising

consumer preference for quality retail, prompting smaller centers to upgrade their offerings and design.

Saudi Arabia's mall-driven retail landscape continues to evolve rapidly under Vision 2030, blending high-end mega-projects and accessible community malls to meet diverse consumer needs. While upscale venues like Solitaire and Diriyah Square set new standards in luxury and experience, community-centric developments ensure retail remains inclusive and widely accessible.

By strategically combining experiential innovations such as concept stores and pop-ups with Saudi Arabia's traditional mall culture, the Kingdom is positioning itself as a leading regional retail hub, balancing luxury aspirations with mass-market appeal and ensuring robust economic and social benefits across all communities.





07.

BUILDING LOCAL CAPACITY: MANUFACTU- RING AND SKILLS

Manufacturing and Supply Chain

As Saudi Arabia develops world-class shopping destinations, building robust local supply chain capabilities is becoming a strategic priority to ensure sustained growth. Recognizing this fact, Saudi Arabia is encouraging new investments and partnerships aimed at strengthening the supply chain. Notably, plans are underway to establish new textile and garment manufacturing facilities to fill infrastructure gaps, focusing on sustainable materials and specialized production lines.

In 2025, Saudi Arabia authorized apparel manufacturing on commercial streets, lowering barriers for urban production and accelerating the growth of flexible local factories.

In a landmark move to further support domestic production, Saudi authorities announced in May 2025 that 46 low-impact industrial activities, including apparel and textile manufacturing, are now permitted to operate within city limits on commercial streets. This development follows the approval of updated regulations by the Ministry of Industry and Mineral Resources.²⁵ The policy shift significantly lowers the barriers to entry for small and mid-sized fashion manufacturers by allowing them to set up closer to commercial and talent hubs, accelerating lead times and enhancing accessibility. The inclusion of clothing production under this regulation represents significant progress in the development of urban, flexible, and scalable manufacturing infrastructure.

Survey insights from 2025 highlight both the needs and optimism currently shaping Saudi Arabia’s manufacturing domain. When asked what infrastructure would most accelerate their growth, local fashion brands pointed to several clear priorities:

Small-Batch Production Facilities:

Flexible factories for limited runs were the most-cited need, as emerging designers want to produce smaller collections locally.

Prototyping Labs and Sampling Centers:

Many brands seek accessible labs to develop samples, test new designs, and refine product quality before scaling up.

Advanced Machinery and Technology:

Investments in modern cutting, sewing, and finishing equipment such as automated cutting machines and 3D

knitting technology are of high priority for designers/ companies looking to improve efficiency and quality.

Logistics and Supply Chain Support:

Improved local logistics, from sourcing materials to distribution networks, were highlighted as critical to the development of a smoother supply chain.

Brands believe that investment in these areas of infrastructure would have the greatest impact on their production capabilities.

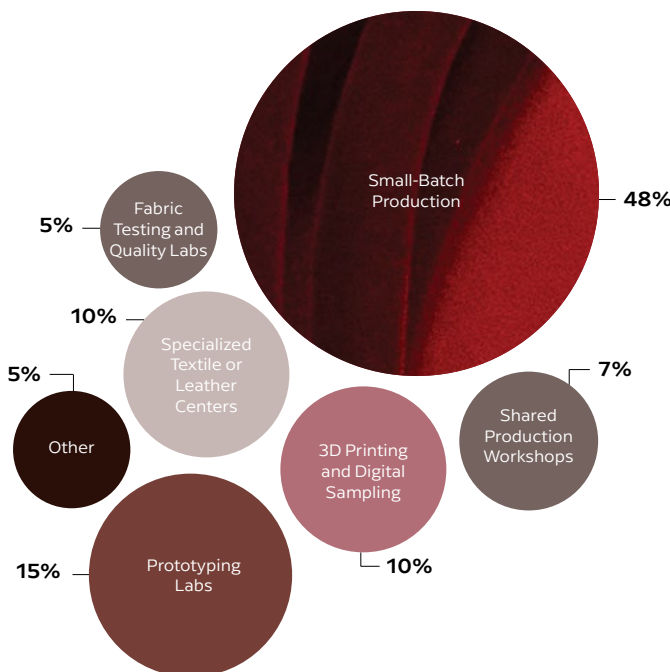
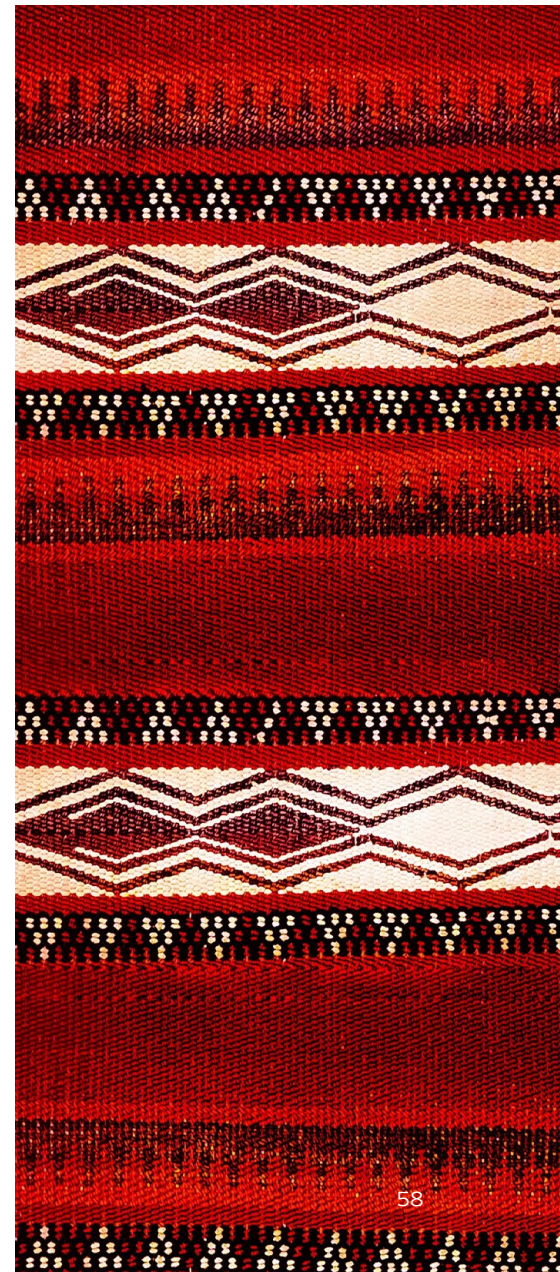


FIGURE 23 Top Infrastructure Priorities for Supporting Local Fashion Brands (%)²⁶



Spinning Growth: Saudi Arabia's Expanding Textile Economy

Saudi Arabia's textile industry is showing signs of steady expansion, supported by policy shifts, infrastructure investments, and increasing private-sector participation. As the country reduces reliance on imports and builds domestic capabilities, textile output is projected to rise over the coming years.

According to market data, Saudi Arabia's textile output was valued at USD 3.08 billion in 2018. It then experienced a downturn in 2020 during the global manufacturing slump, but has since rebounded. In 2024, output was estimated at USD 3.27 billion, with the figure expected to reach USD 3.37 billion by 2025. This growth reflects a compound annual increase of 3.1% in recent years, underscoring the market's resilience and the positive impact of localization efforts.¹⁹

Saudi Arabia's textile output is projected to reach USD 3.67 billion by 2029, supported by steady year-over-year growth since 2022.

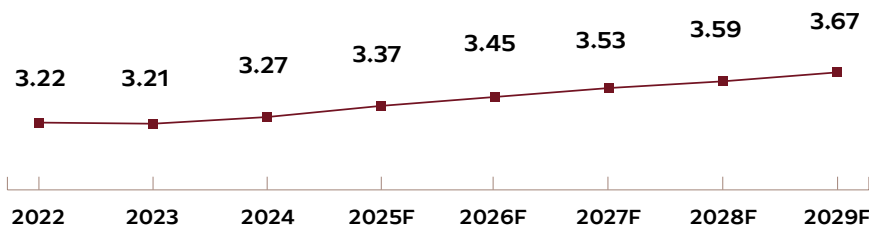


FIGURE 24
Output of Textiles in Saudi Arabia, 2022–2029, USD B¹⁹

This trajectory aligns closely with the Kingdom's broader industrial strategy, which emphasizes local production of textiles, garments, and technical fabrics. The Ministry of Industry and Mineral Resources' recent decision to permit low-impact textile activities in city zones has reduced barriers to entry for manufacturers, creating momentum for small-batch and urban production.²⁵

In the context of the wider Middle East, Saudi Arabia currently holds an 8.7% share of the region's yarn, fiber, and thread market. Within the GCC, this positions the Kingdom ahead of the United Arab Emirates (3.2%), underlining its relative strength in the subregional market. The share also highlights untapped opportunities for expansion, particularly as more regional manufacturers and international brands consider

relocating or co-locating production to Saudi Arabia.²⁷ The rise in textile output and growing regional footprint signals that Saudi Arabia is building the foundations for a robust, flexible, and high-value textile manufacturing sector. With a focus on sustainability, advanced machinery, and proximity to retail hubs, the country is positioning itself to play a larger role in global and regional supply chains over the next decade.



Skills and Talent Development

Infrastructure investment is essential as Saudi Arabia ramps up its productivity and manufacturing capabilities, but the true backbone of any fashion ecosystem is a skilled talent pipeline. Cognizant of this, Saudi Arabia has made strides in recent years in terms of developing its fashion education and training landscape. Higher education in fashion is now more accessible than ever, with Saudi Arabia offering multiple university-level fashion, textile, and jewelry design degree programs.

Enrollment on these programs has been rising steadily, with a significant increase in the number of students pursuing fashion-related degrees since 2022. This is a clear sign of growing interest among Saudi youth in fashion careers, particularly in the areas of design, merchandising, and product development.

Crucially, 2025 has not only brought more academic opportunities but also a broader recognition of the diverse skill sets that power the industry behind the scenes. Alongside core design and business capabilities, there is a growing emphasis on essential sectoral skills such as modeling, fashion photography, fashion show production, and backstage makeup artistry. These roles are critical to enabling professional brand presentation, visual storytelling, and the overall

production value of the Saudi fashion scene. As the ecosystem matures, fostering these competencies will be vital to building a vibrant and fully integrated fashion industry.

Notably, the renowned Istituto Marangoni plans to launch a higher training institute in Riyadh, marking the first time a top global fashion school has established a physical campus in Saudi Arabia. The new institute will offer three-year advanced diplomas in specialties such as fashion design, styling, and fashion business management. Students will also have the opportunity to gain valuable international exposure by completing their bachelor's degrees at one of Marangoni's flagship campuses in global fashion capitals like Milan or Paris.

The Riyadh campus will feature a broad portfolio of tailored programs, including one-year intensive courses and professional tracks for upskilling or reskilling. These courses cover not only fashion design and business but also accessories, branding, and the rapidly growing fields of fragrance and cosmetics. Located in Riyadh's creative district, the campus is surrounded by a dynamic ecosystem of design firms, tech companies, and cultural venues, fostering collaboration and innovation.²⁸

Real-world industry projects are integrated into the Istituto Marangoni curriculum to ensure graduates are work-ready. Students will be equipped not only for traditional fashion careers but also for roles in advertising, consulting, and entrepreneurship. Ultimately, the vision is to cultivate creativity, adaptability, and global fluency, empowering Saudi talent to thrive in a rapidly evolving fashion landscape.

The launch of the Istituto Marangoni higher training institute in Riyadh is timely: according to survey data, Saudi youth rank design, styling, and fashion business among their top three career interests, making Marangoni's arrival a direct response to local aspirations and a catalyst for cultivating globally competitive talent.³

In parallel, the Fashion Commission's partnership with Institut Français de la Mode (IFM) has come into effect in 2025, localizing the institute's acclaimed programs for Saudi talent. Through this collaboration, cutting-edge curricula and expert faculty from Paris are helping to train Saudis in areas like luxury brand management and fashion marketing. These developments mean that aspiring designers and industry professionals no longer need to go abroad for elite fashion education; world-class instruction is now available at home and in tune with local market contexts.²⁹

Bridging the Gap: The Pillars of Skills Developments

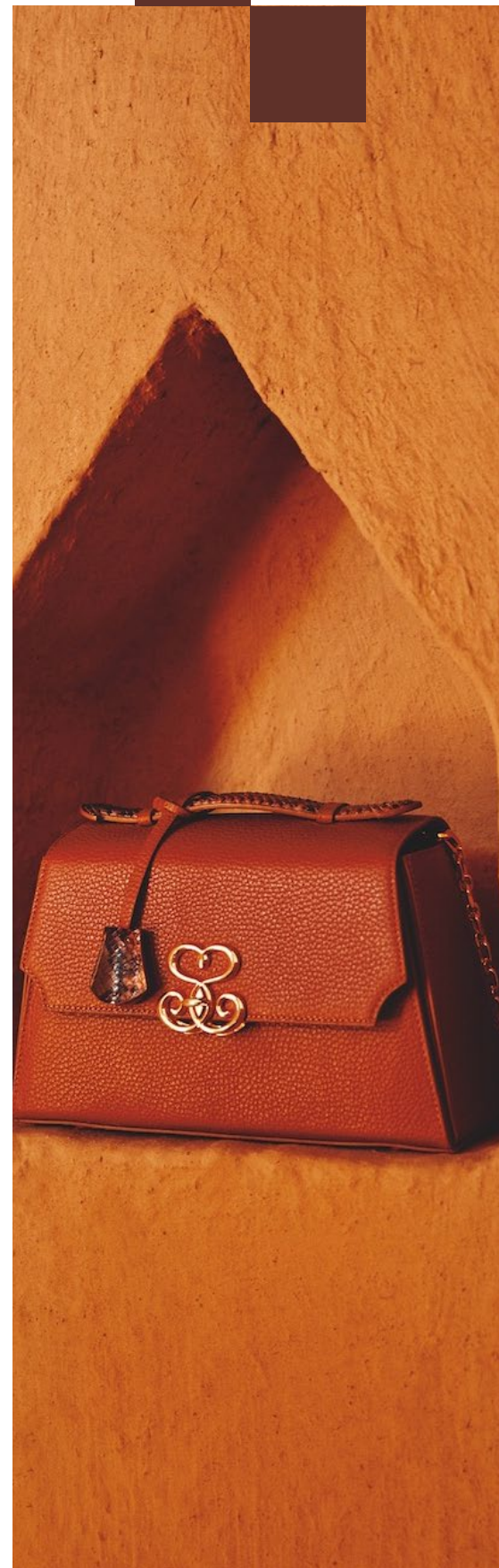
Despite huge leaps in education and training, ensuring that Saudi Arabia's skills supply meets industry demand remains a work in progress. The Saudi 100 Brands survey of fashion labels and young professionals in 2025 reveals a mix of alignment and gaps when it comes to industry needs and workforce capabilities.

Saudi designer, Reem Alkanhal, highlights how the growing interest in local production, sustainable practices, and global showcasing is creating fertile ground for independent brands to flourish. While she acknowledges that many designers are still building their understanding of key business functions such as pricing strategies, logistics, and international distribution, she views this as an opportunity for targeted capacity-building.

The emergence of mentorship and training programs led by the Fashion Commission has already begun to address these needs, equipping creatives with tools to scale confidently. Alkanhal is optimistic that with continued investment in local infrastructure and specialized education, Saudi designers will be able to produce world-class fashion entirely at home. Her vision for 2030 is one of empowerment: a thriving ecosystem of Saudi-owned factories, sustainable production hubs, and fashion talent that confidently competes, and collaborates, on the global stage.

There is a growing consensus among brands in the fashion industry regarding the critical importance of digital, technical, and operational skills. The most in-demand competencies reported by brands include product development and sourcing, brand management and strategy, and digital marketing and e-commerce. These are reflected in the data, where brand management and strategy leads significantly, followed by product development and sourcing, and digital marketing. Skills such as technical design and fashion retail/customer experience follow, while areas like visual merchandising and styling see little demand.

Despite the importance of digital, technical, and operational skills to the fashion ecosystem, a gap persists between industry needs and the self-assessed strengths of recent graduates. Young fashion professionals often rate themselves highly in creative and front-end areas such as design and social media marketing but express lower confidence in behind-the-scenes technical expertise such as fabric technology, pattern engineering, or advanced tools like computer-aided design (CAD) and 3D modeling. This misalignment suggests a need to recalibrate fashion education and training programs to better match evolving market demands and ensure talent is equipped for the full value chain, from concept to customer delivery.



Brands report that their top in-demand capabilities now include brand management and strategy, product development and sourcing, and digital marketing and e-commerce. They also value skills in fashion retail and customer experience as the market becomes more omni-channel. Young fashion graduates, for their

part, tend to rate themselves strongest in brand-related and digital fields, while very few specialize in technical design or visual merchandising. This suggests a partial mismatch: the industry is hungry for behind-the-scenes executional expertise, yet many new entrants still focus on front-end brand and marketing skills.²⁶

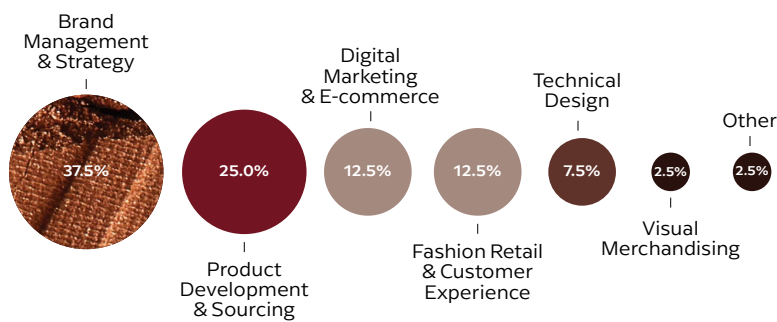


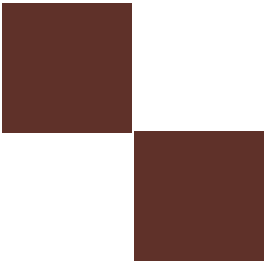
FIGURE 25
Most In-Demand Skills in the Local Fashion Industry (%)²⁶

While bridging this gap presents a challenge, it is also an area of opportunity. For example, brands have noted a shortage of skilled pattern-makers and production managers, both of which are crucial roles in ensuring quality and scalability, and many talented designers are eager to acquire the related skills.

Building on the success of a 2022 pilot, the Digital Fashion Program has now been fully integrated into Saudi Arabia's design education ecosystem. Initially launched online in partnership with Istituto Marangoni and the Saudi Fashion Commission, the five-month program has taught designers to develop true-to-life 3D

garment prototypes, adjust fit and style in real time, and apply animation and motion techniques for digital showcases. Since its launch, the program has transitioned into a staple offering for designers nationwide, inspiring universities and institutes to incorporate 3D prototyping, AR/virtual reality (VR) applications, and basic artificial intelligence (AI) assisted design into their curricula. This aligns with global shifts toward virtual try-ons and AI-enhanced creativity, helping to reduce textile waste, eliminate physical samples, and accelerate product development across Saudi's growing fashion industry.





To capitalize on this progress, continued alignment between industry and academia is key. Recent surveys suggest that when training focuses on the areas that brands are seeking (brand management, business acumen, product development and sourcing), the outcome will be a home-grown workforce ready to propel the fashion industry to new heights. With international-caliber institutes now in Riyadh and concerted efforts to upskill local designers, Saudi Arabia is on track to cultivate a pool of fashion talent equipped to compete on the global stage. The gap between industry needs and talent is narrowing year by year and 2025 offers the clearest indication yet that the best is still to come.

With global fashion institutes now in Riyadh, Saudi youth are gaining world-class training to power a homegrown, globally competitive fashion industry.



08.

SUSTAINABILITY AND CIRCULAR ECONOMY: LOCAL ACTIONS, GLOBAL IMPACT

Sustainability has moved from a buzzword to a central pillar in Saudi Arabia's fashion strategy under Vision 2030. The national reform agenda explicitly encourages reducing, reusing, recycling, and upcycling garments to ease the environmental burden. This aligns Saudi fashion

with global environmental, social, and governance (ESG) trends where regulators and investors increasingly scrutinize environmental impact. Responding to this global context, Saudi Arabia is positioning its fashion industry to lead on sustainability in the region.



Saudi Sustainability Index

The 2024 edition of the Saudi Sustainability Index assessed fashion stakeholders across three pillars: circularity, social impact, and leadership and governance. Retailers outperformed brands, averaging 56% on the index versus 38%. Specifically, they scored highest in social impact (69%), followed by circularity (52%), and leadership and governance (49%). Brands, in contrast, scored 34% in circularity and 33% in leadership, though they showed promise in social impact (50%). Industry-wide, the average score across pillars was 48%, revealing room for progress. Top performers included global luxury group, Kering, which earned Sustainability Champion status with over 70%, and Landmark Group and Chalhoub Group, which were both recognized for strengths in social impact and governance.

On the brand side, Haifa Humaid led with a high score in social impact, followed by Chaldene and The Untitled Project. Saudi designers are also advancing sustainability. Ghaydaa Majdaly employs 3D design and recycled materials in a zero-waste strategy, while designers like Nasiba Hafiz, Zakiya Attar, and Honayda Serafi have partnered with Al-Oula Women's Charitable Society to create upcycled garments for charitable causes. These efforts highlight Saudi Arabia's growing commitment to sustainability and innovation in fashion, with the Sustainability Index set to become a key annual benchmark for recognizing progress and guiding strategic decisions.



Circular Fashion Center and Consumer Sentiment

96% of Saudi consumers are aware of fashion's environmental impact, and 64% say it often or always affects their purchase decisions.

Saudi Arabia's push for sustainable fashion is moving from vision to action, backed by policy, infrastructure, and public engagement. In late 2024, the Fashion Commission announced plans for a Circular Fashion Center to coordinate recycling, upcycling, and material innovation programs. By 2025, this vision began materializing through initiatives like the Future of Sustainability program, which introduced clothing recycling bins in major malls to promote everyday textile recycling and encouraged brand take-back schemes. The aim: normalize sustainable behavior across the retail ecosystem.

Recent survey results reveal strong consumer awareness of sustainability issues in fashion. A combined 96% of respondents said they were aware of environmental concerns such as waste, water use, and carbon impact. This awareness significantly influences purchasing behavior: 64% of respondents stated that environmental considerations "always" or "often" affect their choice of fashion brands or products. These findings highlight a growing demand for responsible fashion and suggest that sustainability is becoming a key factor in consumer decision-making.³



Greater spending power is linked to stronger environmentally driven choices. Higher-income consumers are more likely to let sustainability influence their fashion purchases.

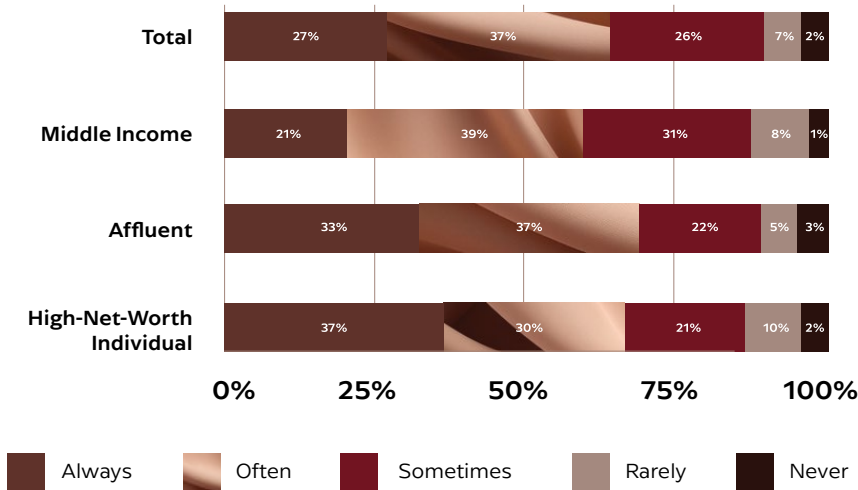
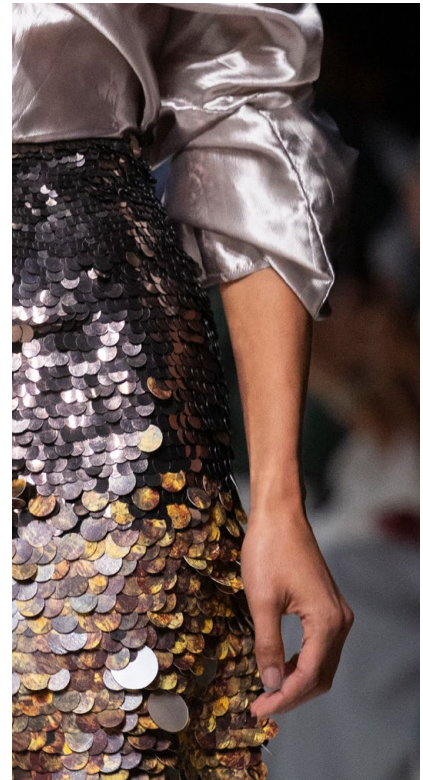


FIGURE 26
Impact of Environmental Awareness on Fashion Buying Behavior by Income Level (%)³



Case Studies: Brands Leading Sustainability

Saudi designer, Ghaydaa Majdaly, is pioneering tech-driven circular fashion by transforming recycled plastics like discarded water bottles into avant-garde garments. Using 3D design and printing, she minimizes textile waste and experiments with recycled PET fibers to create luxury-like fabrics. Her zero-waste approach merges innovation with sustainability and exemplifies how Saudi talent is localizing global circular fashion practices.

L'Oréal Dermatological Beauty is also embedding sustainability in Saudi Arabia through targeted initiatives. The company is accelerating refill availability

for La Roche-Posay, Vichy, and CeraVe products and has implemented a zero-air freight policy to significantly reduce carbon emissions. Moreover, enhanced business planning practices ensure minimal waste, and L'Oréal has committed to making all of its events in the Kingdom 100% green. Going beyond environmental sustainability, the company's Fight with Care initiative in partnership with King Faisal Hospital provides dermatological care to 4,000 cancer patients, reflecting its integrated approach to environmental and social responsibility.¹⁶

Ihram Recycling Initiative

Saudi Arabia's Ihram recycling initiative aims to repurpose 100,000 tons of textile waste by 2030, preventing 615 million kg of CO₂ emissions.

One of Saudi Arabia's most innovative circular fashion initiatives centers on the Ihram garment, which is worn during Hajj and Umrah. In 2024 - 2025, the Fashion Commission launched the Sustainable Ihram Initiative to collect, sanitize, and recycle used ihrams, which are typically discarded after brief use. The initiative successfully collected 34 tons of used ihrams, repurposing them into 26,000 new sustainable ihrams. In partnership with SIRC, Tadweem, and Sanko Textile Group's Re&Up technology, the project aims to repurpose the fabric into new ihrams, towels, and cotton-based products. The project envisions scaling up and recycling 100,000 tons by 2030, potentially avoiding 615 million kg of CO₂-equivalent emissions.

Plans include a dedicated recycling facility in Makkah, which would transform the holy city into a circular textiles hub. This marks a shift from Saudi Arabia's historic reliance on landfilling textile waste to building domestic recycling capacity, creating new green jobs in the process. The initiative also carries cultural resonance, promoting environmental stewardship as a religious and civic duty. Pilgrims are now encouraged to return used garments, embedding sustainability within sacred rituals. The Sustainable Ihram Initiative exemplifies Saudi Arabia's ability to unite tradition with innovation, creating a global model for ethical and faith-aligned sustainability.



Kering Generation Award

In another milestone for sustainability and innovation, 2025 has marked the launch of the inaugural Kering Generation Award X Saudi Arabia, a collaboration between Kering and the Saudi Fashion Commission. The award was created to spotlight visionary startups that are advancing customer engagement, circular economy practices, and water protection across the fashion ecosystem. Among hundreds of applicants, three winners were recognized this year for their bold approaches: Darah Solutions Lab, a recycling-focused social enterprise turning textile waste into new creations; Amused, the Kingdom's largest AI-powered platform for pre-loved luxury; and Asteri, a 'desert-proof' and 'clean beauty' brand committed to cruelty-free, microplastic-free, and B-Corp-certified practices.³⁰

According to Asteri's founder Sara Alrashid: "Sustainability is not a single initiative. It's a mindset that touches every part of our business. Being recognized by Kering reinforces that a beauty brand from our region can set global standards."

Winners presented at the ChangeNOW 2025 Summit and will join a mentorship program in Paris, reinforcing Saudi Arabia's rising leadership in ethical fashion.

Innovation and Research at KAUST

Technological innovation is central to Saudi Arabia's sustainable fashion strategy, with King Abdullah University of Science and Technology (KAUST) leading research and development (R&D) efforts to 'greenify' the value chain. A key focus is replacing polyester commonly used in thobes and abayas with biodegradable alternatives that meet local dress standards while reducing environmental harm. Between 2024 and 2025, KAUST launched pilot projects exploring plant-based nanofibers and low-water natural dyeing techniques. These technical breakthroughs are paired with startup incubation through KAUST's Innovation Center and the Fashion Commission. Entrepreneurs are developing smart textiles, AI-powered recycling tech, and other cleantech solutions, supported by hackathons, mentorship, and funding.³¹

The long-term vision is to produce sustainable fabrics, build domestic supply chains, and export green materials globally. This fusion of science, fashion, and entrepreneurship positions Saudi Arabia as a leader in fashion-tech innovation, with KAUST driving the shift from petrochemical textiles to scalable, eco-friendly alternatives.

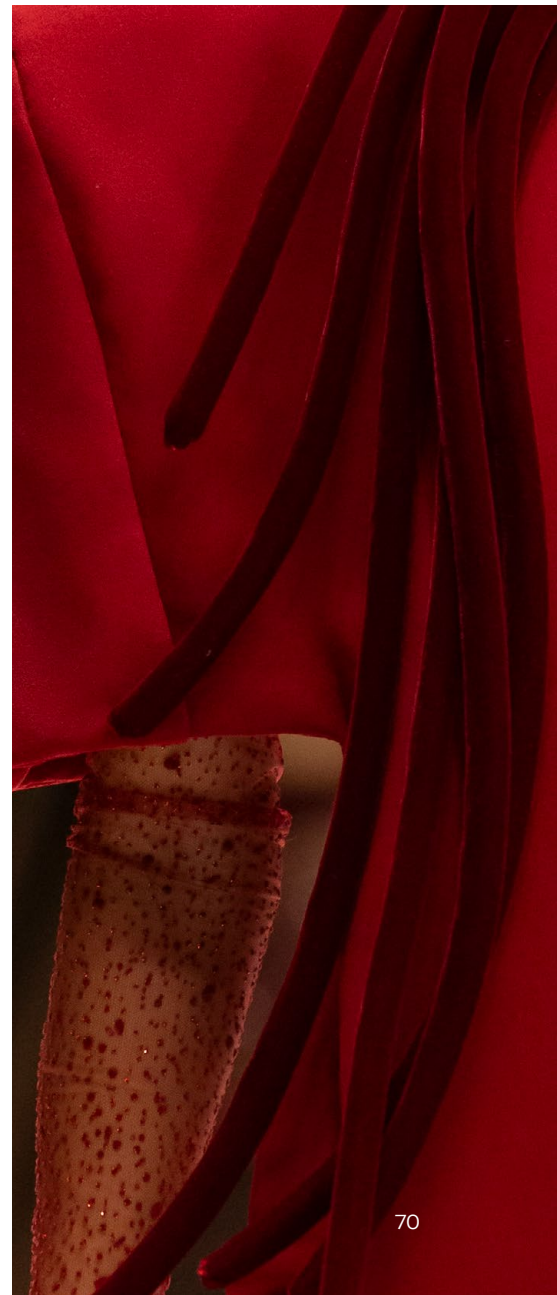
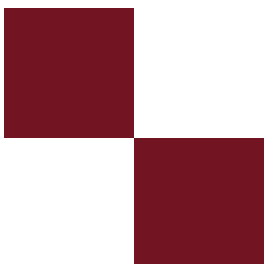
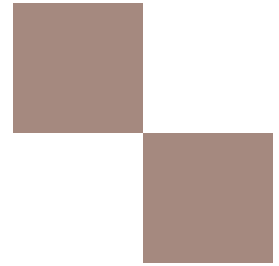




Youth-Driven Sustainability and Momentum for Saudi Fashion

In a recent survey, sustainable fashion emerged as the top trend identified by young fashion professionals in Saudi Arabia. This indicates that the next generation of fashion leaders not only acknowledges the importance of sustainable practices but also views them as fundamental to the industry's evolution in Saudi Arabia, both as a core value and a practical skill.¹⁴

Saudi Arabia's sustainable fashion agenda is advancing in parallel with global efforts to transform the apparel industry. Through an investment lens, Saudi's ESG integration reduces risk and boosts appeal, and with 73% of Gen Z willing to pay more for sustainable products, demand is shifting. Saudi's Cultural Development Fund is offering favorable financing to fashion businesses with sustainability built in, attracting both local designers and international investors. Regionally, Saudi leads the GCC in fashion sustainability and may soon become a model for others.³



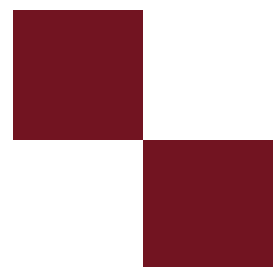


09.

RIYADH FASHION WEEK: A NEW DRIVER OF SAUDI TOURISM

Riyadh Fashion Week has become the centerpiece of Saudi Arabia's fashion calendar, signaling the Kingdom's rise as an international fashion destination. More than a showcase, the event is now a strategic lever for economic diversification and cultural diplomacy.

On its launch in October 2023, RFW marked a historic milestone as the first time Saudi designers collectively showcased their collections on a domestic runway. Following its successful debut, the 2024 edition saw more than 30 Saudi designers display their collections across three venues: Tuwaiq Palace, Digital City, and JAX District. Renowned Saudi maisons such as Adnan Akbar, Tima Abid, Dar Alhanouf, and Honayda headlined the event.



Riyadh Fashion Week is redefining Saudi Arabia's global image. 77% of Saudis are familiar with the event, and 79% want to attend future editions.

Riyadh Fashion Week 2024 was met with an enthusiastic response from both local consumers and international observers revealing robust demand for Saudi-designed fashion. Featuring pop-ups and brand activations, the event created a halo effect, sparking local pride and interest in homegrown brands, while convincing global luxury players that Saudi Arabia is a viable destination for fashion tourism and investment.

This year, Riyadh Fashion Week, scheduled for October 16 - 21, is expected to feature a larger international presence, from regional fashion influencers to global retail executives scouting new designers.

RFW's qualitative impact is significant: the event is shifting perceptions, positioning Saudi Arabia as a modern, creative, and trend-setting nation. Positive sentiment from the Saudi public indicates this is more than a passing phase. According to the 2025 consumer survey, 77% of Saudi respondents are familiar with Riyadh Fashion Week, and 79% express interest in attending future editions. These findings highlight the event's rising visibility and cultural relevance among local audiences.³



83% of female respondents are familiar with Riyadh Fashion Week, compared to 68% of male respondents.

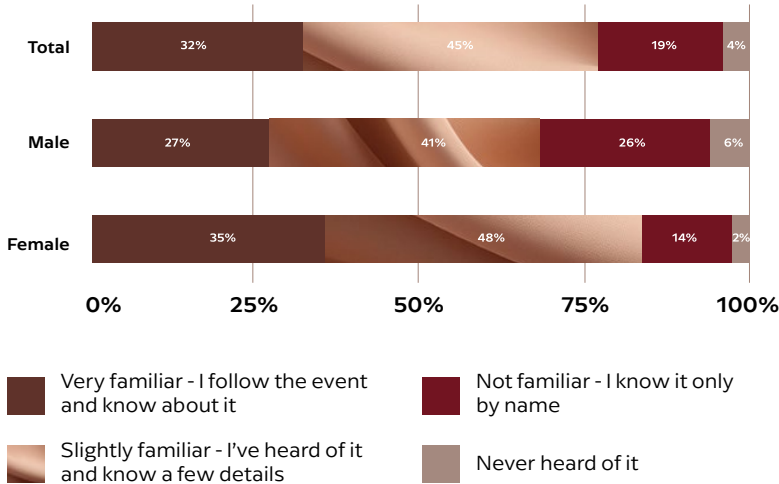


FIGURE 27 Awareness of Riyadh Fashion Week Among Saudi Consumers (%)³

Prominent Saudi model, Taledah Tamer, highlights the impact of the event: “As the Riyadh Fashion Weeks continue, we will start to see more new faces emerging and I’m so excited for that. It’s a great opportunity to work in the region and to represent your country.”

Tamer also emphasizes the rapid evolution of the Saudi modeling landscape: “There are more Saudi models being featured regionally and internationally. Riyadh Fashion Week significantly elevates modeling careers, creating tangible opportunities.”

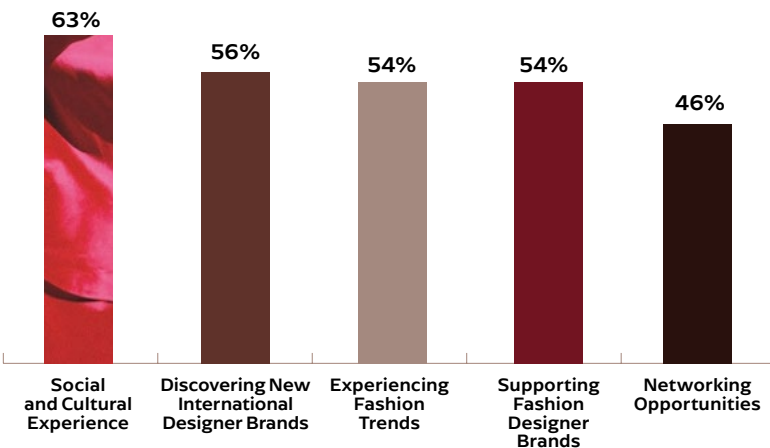
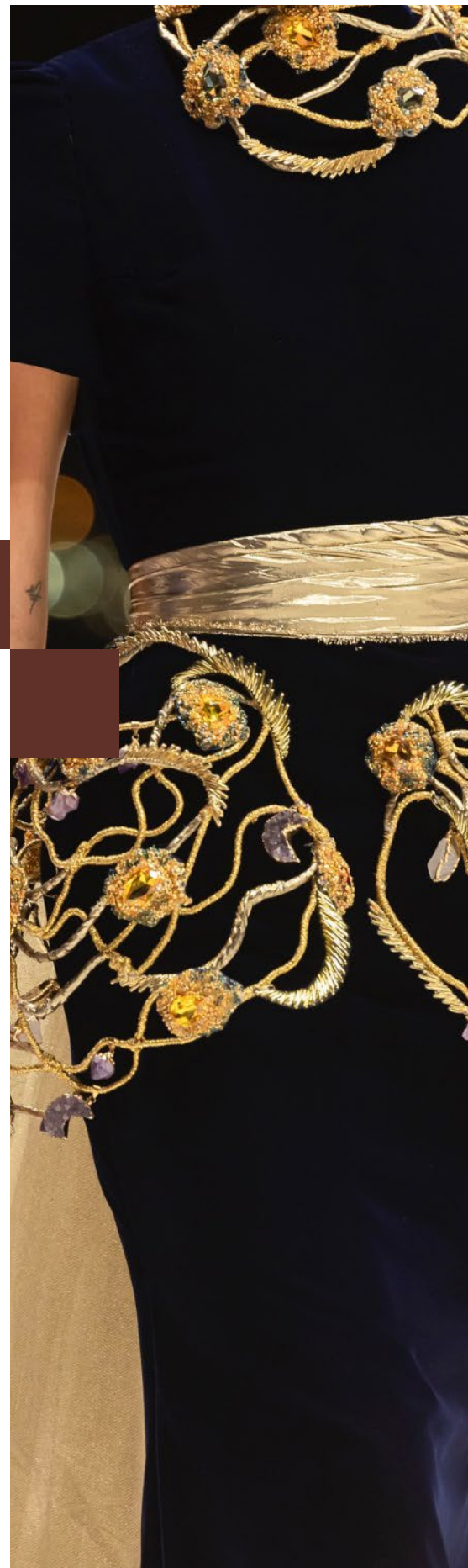


FIGURE 28 What Drives Public Interest in Attending Riyadh Fashion Week? (%)³



Riyadh Fashion Week has quickly transcended its status as a mere runway showcase to become a symbol of Saudi Arabia's cultural evolution and global ambitions. As shown in the Figure 28, consumers are increasingly drawn to the event not only for the fashion itself, but for the unique blend of creativity, culture, and community it represents. The strong interest in attending Riyadh Fashion Week reflects a broader desire among Saudi consumers to be part of a dynamic cultural moment, one that celebrates local talent while engaging with global fashion currents.

By merging fashion, heritage, and hospitality, Riyadh Fashion Week is redefining the Saudi experience for global audiences while empowering local industries. As the event continues to grow in stature and scope, it offers a compelling blueprint for how cultural programming can drive economic transformation and global soft power.

The Broader Intersection of Fashion and Tourism

Events like Riyadh Fashion Week are contributing to Saudi Arabia's rapidly evolving tourism landscape, driven by Vision 2030 reforms. Such fashion-centered events attract global travelers eager to experience Saudi Arabia's flourishing creative scene firsthand. Such is its appeal, the Kingdom is emerging as an international hub for high-profile showcases, brand activations, and exclusive experiences.

Mega-events across sports, music, and culture are also acting as dynamic catalysts for fashion and luxury retail. The Saudi Cup, for example, further solidified its status as Saudi Arabia's premier fashion spectacle in 2024, with attendees expressing race-day elegance through culturally inspired couture. The event fostered local designer collaborations and provided international luxury brands with opportunities to activate branded lounges and engage high-value clients. In another notable example, Christian Dior launched its acclaimed Designer of Dreams exhibition at the Saudi National Museum, showcasing 75 years of Dior couture with special sections highlighting local inspirations like the AlUla desert's light and sands.

Meanwhile, MDLBEAST's Soundstorm and the XP Music Futures festival have become influential fashion

platforms in their own right. Soundstorm has evolved into a vibrant street-style showcase, while Saudi's homegrown festival-wear brand, Bani Beast, leveraged the XP Music Conference to launch a second capsule collection and pop-up, expanding its reach and highlighting local creativity.

Fashion brands have also embraced iconic Saudi cultural sites and events as unique backdrops for their activations. Notably, Dolce & Gabbana has hosted an opulent couture presentation amid AlUla's ancient heritage sites and international fashion houses capitalized on the influx of style-conscious visitors during Jeddah's Red Sea International Film Festival, offering VIP events and showroom experiences that further blurred the lines between cultural tourism and luxury retail.

From couture showcases to designer hotel collaborations, Saudi Arabia is merging fashion, heritage, and hospitality to become a top-tier cultural tourism destination.

Fashion Meets Hospitality: Integrating Style into Service

As Saudi Arabia upgrades its hospitality sector for international travelers, hotels, airlines, and real estate developments are leveraging fashion partnerships to elevate both brand image and guest experience.

Designer Hotel Boutiques and Collaborations:

Five-star hotels in Saudi Arabia increasingly host in-house luxury boutiques and exclusive fashion events. For example, Four Seasons Hotel Riyadh at Kingdom Centre partnered with local luxury brands, Art of Heritage and Dar Al Hanouf, to curate an exclusive Ramadan 2025 couture collection.³² Similarly, Banyan Tree AlUla, along with other resorts, often stock local designer accessories and apparel in their gift shops, giving visitors a chance to purchase high-end souvenirs like hand-embroidered shawls or fragrances by Saudi perfumers. As tourism grows, more hotels are expected to team up with designers for pop-up boutiques, fashion-themed suites, and styling services.

Fashion-Branded Residences:

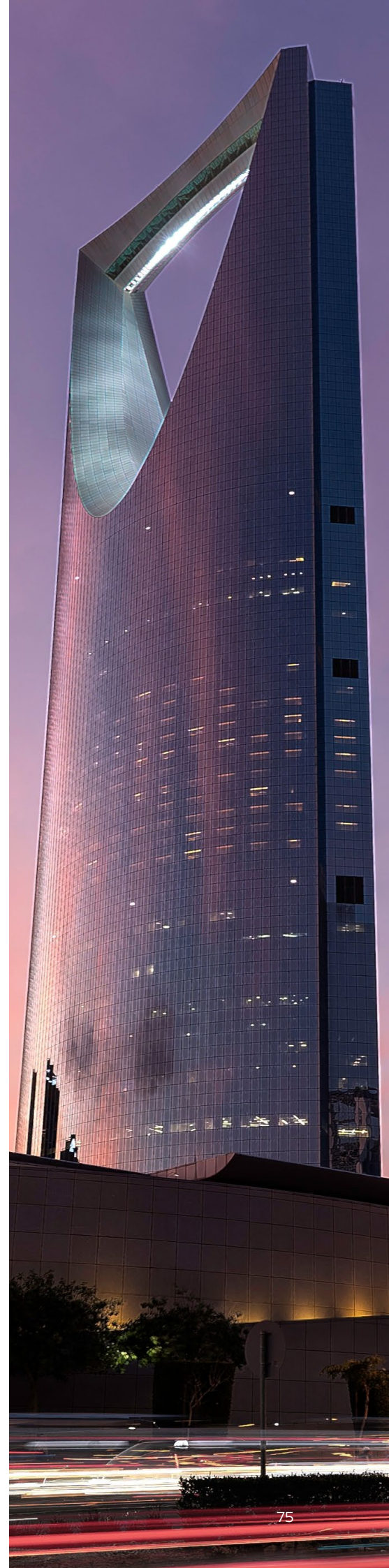
In a melding of real estate, hospitality, and fashion, Saudi Arabia is welcoming branded residences and hotels by couture houses. In April 2025, Diriyah Company launched Armani Residences



Diriyah, the first homes in Saudi Arabia styled by the iconic Italian fashion designer. Fifteen residences adjacent to the upcoming Armani Hotel Diriyah will feature interiors curated by Giorgio Armani, blending the brand's aesthetic with traditional Najdi architectural touches. Beyond Armani, Diriyah's master plan hints at other potential collaborations including an Orient Express hotel with interiors by a famed designer, and a Bulgari Resort & Residences. Such projects offer foreign investors opportunities in co-developing branded lifestyle properties in Saudi Arabia's real estate sector.¹²

'Haute Couture' Uniforms:

Fashion is elevating the staff uniforms of Saudi Arabia's travel and hospitality brands. The most prominent example is Saudi Arabia's new flagship airline, Riyadh Air, which has engaged Saudi couturier, Mohammed Ashi (Ashi Studio), to design its inaugural cabin crew uniforms. Riyadh Air's CEO noted the cabin crew fashion will be "one of the first things our guests see... and we are confident that Ashi's unique designs will leave a lasting impression."³³





In summary, Riyadh Fashion Week has rapidly become a cornerstone of Saudi Arabia's cultural transformation, positioning the Kingdom as an influential global fashion hub. The event's growing international visibility and enthusiastic local reception reflect its significant role in driving fashion tourism, promoting homegrown design talent, and advancing Vision 2030's diversification goals. By integrating fashion, luxury hospitality, and high-profile cultural events, Riyadh's fashion scene not only enhances Saudi Arabia's global reputation but also generates tangible economic opportunities, showcasing the Kingdom's vibrant creativity and modern identity, both to local audiences and to the world.



10.

WELLNESS, LIFESTYLE, AND FASHION CONVERGE

Across the globe, the boundaries between wellness, lifestyle, and fashion are rapidly dissolving as consumers seek products and experiences that support both health and self-expression. Luxury brands have embraced this development, investing in athleisure, wellness technology, and clean health-oriented product lines.

With 58.5% of adults regularly active, Saudi Arabia's USD 1.8B fitness market is transforming gyms into fashion-forward hubs for athleisure and lifestyle retail.

Boutique Fitness: From Gym Studios to Lifestyle Hubs

Saudi Arabia is experiencing a dynamic fusion of its creative renaissance and expanding fitness culture, transforming gyms into lifestyle hubs that blend exercise, community, and fashion. Boutique studios offering yoga, spinning, CrossFit, and Pilates are expanding rapidly in Riyadh, Jeddah, and beyond, driven by rising demand for personalized coaching, wellness programs, and tech-enabled workouts. Enhancements like spa-style amenities, juice bars, and athleisure boutiques, along with 'Instagramable' interiors, are also elevating the experience.

This momentum is reflected in the numbers: 58.5% of individuals aged 18 and above engage in physical activity for 150 minutes or more per week across Saudi Arabia. As a result, the health and fitness market is projected to grow from USD 1.06 billion in 2025 to USD 1.79 billion by 2030, representing a CAGR of 10.9%.³⁴





Athleisure: Fashion in Motion

The rise of athleisure apparel that transitions from workouts to daily wear exemplifies the wellness-fashion nexus. In Saudi Arabia's sportswear segment, athleisure is taking center stage, prized for its blend of style and functionality. This trend has been especially robust among youth and professionals who favor casual, fitness-friendly attire in everyday life. Global activewear giants like Nike and Adidas have expanded local offerings, introducing designs aligned with cultural norms to cater to Saudi consumers. Collaborations such as the Adidas x KAF by KAF sportswear and street style highlight the segment's creative potential.

This fashion shift is underpinned by a surge in sports participation and growing health

consciousness. As shown in Figure 29, the Saudi fitness club market is projected to more than double between 2024 and 2029, growing at a CAGR of 11.6%. This rapid growth reflects not only expanding infrastructure and services but also rising consumer commitment to wellness, a key driver of demand for athleisure apparel.

Vision 2030's emphasis on building an active society is evident in the proliferation of gyms, sporting events, and community fitness initiatives. Programs like the Saudi Sports for All Federation and headline events including Formula One and international football tournaments have invigorated public interest in fitness, particularly among women, who now have greater access to facilities and are actively reshaping the athleisure landscape.

CAGR (2024 - 2029): 11.6%

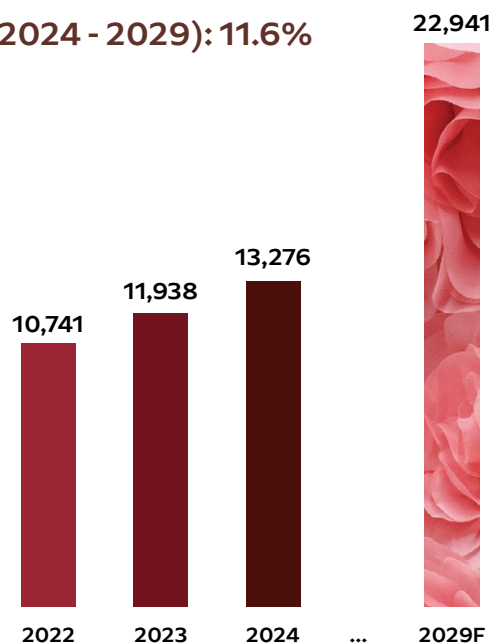


FIGURE 29
Saudi Health and Fitness Clubs Market, USD B³⁵

As more women and men join gyms and sports clubs, they are investing in stylish performance apparel that can be worn beyond the treadmill. This fuels a growing sportswear market that is expected to expand to USD 1.7 billion by 2029 up from USD 1.5 billion in 2024,

representing a CAGR of 3.9%. Such market growth invites international and local brands to innovate: local designers are launching their own sports fashion lines and global brands are marketing 'desert-proof' activewear suited to the Saudi climate.

Sportswear Segment

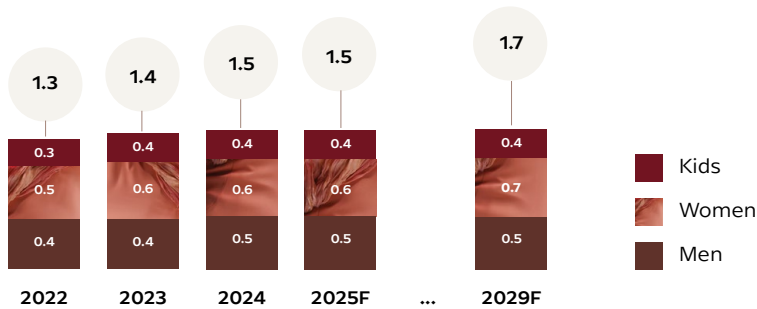


FIGURE 30 Saudi Sportswear Market Overview: Men's, Women's, and Kids' Segments, USD B^{1 2}

While performance apparel and footwear hold steady, their presence highlights the continued relevance of function-first fashion, especially for gym-goers and sports participants.

Meanwhile, sports-inspired categories that are more fashion-oriented and lifestyle-driven, signal the growing role of activewear as everyday attire in Saudi Arabia's evolving wardrobe.

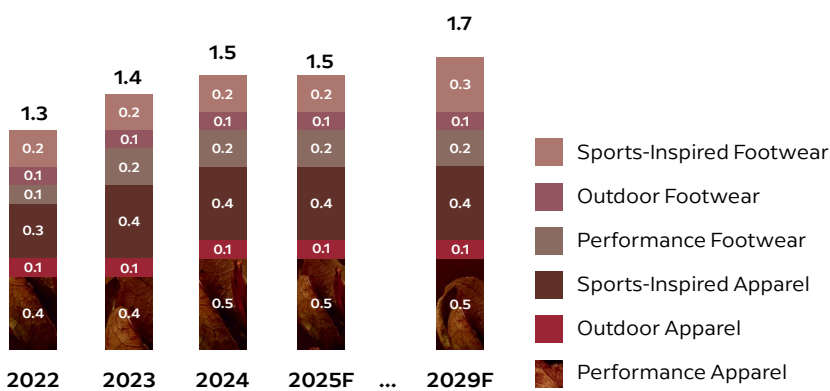


FIGURE 31 Saudi Sportswear total and Market by Category: Retail Value and Forecast, USD B²²



Drilling down further, the Saudi market is led by dominant international players like Adidas (26%), Nike (21%), and Puma (15%), underscoring the strong influence of global brands.

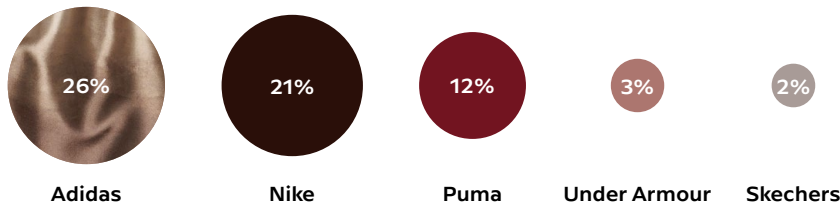


FIGURE 32
Top Sportswear Brands by Market Share in Saudi Arabia (% , 2024)²

From a business perspective, athleisure’s popularity is reshaping retail. Stores now dedicate more space to sports-fashion hybrids, and e-commerce platforms report brisk sales of yoga pants and sports hijabs. More broadly, with over half of Saudis under 30 and digitally connected, demand for trendy yet functional apparel is growing fast. Members of this demographic view fashion as part of their identity and embrace brands that align with their wellness-oriented values. Recognizing this, industry players are responding with collaborations such as designer sneaker lines and athletic capsule collections, as well as product innovations like temperature-regulating fabrics for hot climates. The convergence is clear: staying fit and looking chic are no longer separate pursuits.



Clean Beauty and the Rise of Wellness Cosmetics

Just as wardrobes are becoming wellness oriented, so too are makeup bags and skincare shelves. Clean beauty, a concept that includes products formulated without harsh or harmful ingredients, has surged in popularity in Saudi Arabia, reflecting a broader desire for health-conscious lifestyles. Fueled by rising health and environmental awareness, Saudi consumers are increasingly scrutinizing labels and gravitating toward organic, natural, and cruelty-free cosmetics. Global wellness trends are also resonating locally. Halal and vegan beauty lines that are free from alcohol, animal derivatives, and harsh chemicals have gained a foothold among Saudi Arabia's high-end retailers and pharmacies.

This movement aligns with industry data: the Saudi beauty market, valued at approximately USD 5.8 billion in 2024, is projected to reach USD 8.8 billion by 2029 (8.7% CAGR), driven in part by demand for clean products and higher spending by empowered female consumers. More broadly, the Middle East's beauty market is worth over USD 46 billion, with potential to hit USD 60 billion this year and Saudi Arabia is a key driver.² This signals how beauty and wellness now intersect: consumers equate 'clean' with 'quality', seeing skincare and makeup as extensions of personal wellbeing.

Saudi Arabia's wellness economy, now worth nearly USD 7.8B, is fueling growth across beauty and fitness, through integrated, lifestyle-driven experiences.



Saudi Arabia's beauty and personal care market is set to reach USD 8.8B by 2029, led by strong growth in fragrances, hair care, and skin care.

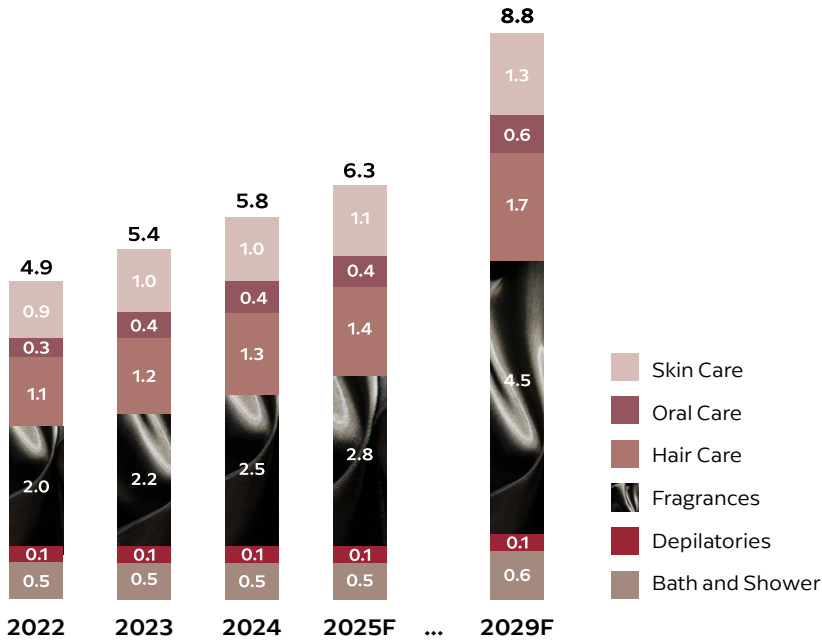


FIGURE 33
Saudi Beauty and Personal Care Market by Product Category, USD B²

In response, international beauty brands have introduced 'free-from' product lines, and local entrepreneurs are innovating with formulas tailored to regional needs. Many retailers highlight clean labels, making it easier for shoppers to find toxin-free options. One example is Sephora Middle East, with its 'Clean at Sephora' messaging. The clean beauty wave has also fostered ingredient transparency and education. Today, Saudi influencers and dermatologists on social media often discuss the benefits of botanical extracts or the downsides of parabens, influencing purchasing decisions.

Crucially, the clean beauty trend is giving rise to homegrown brands that blend wellness with local culture.

These brands use Middle Eastern botanicals such as prickly pear and date seed oil, and emphasize ethical production, resonating with a generation that values authenticity. In a recent consumer survey, Abdul Samad Al Qurashi was the most frequently recalled Saudi name in the beauty and fragrance category, even when recognition was limited to name alone, highlighting the growing visibility of local players.

K-beauty (Korean beauty) is also a fast-growing influence in the region. Within the GCC, K-beauty leads Asian-origin cosmetics exports with a market value of USD 108 million, significantly outpacing Japanese beauty (USD 17M) and Chinese beauty (USD 15M).⁹ Over

85% of K-beauty's footprint lies in skincare, aligning closely with Saudi Arabia's clean beauty preferences.⁹ Known for gentle, innovative formulations and strong presence on Western social media, K-beauty appeals to younger consumers seeking wellness-driven, mid-to-premium products. Its popularity in the GCC reflects the broader regional demand for high-performance, health-conscious beauty.

Here, Saudi entrepreneurs are proving that beauty can be simultaneously high-performance and health-conscious. The broader impact on the industry is significant: companies are reformulating legacy products, investing in R&D for desert climate skincare, and updating marketing to highlight wellness benefits, such as makeup with skin-nourishing ingredients. In short, beauty in Saudi Arabia is no longer just about glamor; it is about clean, conscious self-care, mirroring global shifts in consumer behavior.

As a result, clean, natural, and 'free-from' formulations have moved into the mainstream. YouTube searches for 'clean makeup' in Saudi Arabia have jumped 13-fold and minimalist, wellness-driven regimens like 'skin cycling' are gaining popularity.³⁶



Saudi consumers prioritize ingredient safety, expert validation, and brand transparency when choosing beauty and skincare products, far outweighing celebrity or influencer endorsements.

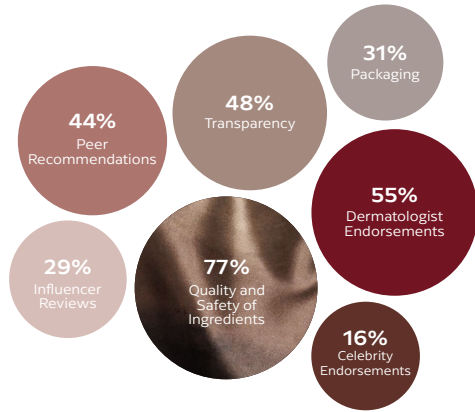


FIGURE 34
Top Purchase Drivers for Beauty and Skincare Brands in Saudi Arabia (%)³



Facilitated by Saudi Arabia's favorable regulations and Vision 2030 initiatives, homegrown brands are emerging as innovators in the space. For example, MZN Bodycare emphasize plant-based ingredients such as moringa, olive, and rose oils, and they operate with vegan, cruelty-free principles. Such brands have scaled from niche markets to national retailers and spas, meeting rising demand for ethical, 'farm-to-face' products.

Clean beauty in Saudi Arabia is no longer niche, it is a mainstream movement shaping the future of cosmetics. Whether through safer ingredients, local sourcing, or holistic branding, Saudi consumers are driving this transformation, and brands that align are best positioned for growth.



Case Study: Asteri – Clean Beauty, Saudi Soul

Launched in May 2023 by Saudi entrepreneur Sara Al-Rashed, Asteri Beauty has emerged as one of the Middle East’s most innovative and culturally resonant beauty brands. Designed to address the specific needs of Gulf consumers in terms of climate, skin types, and cultural values, Asteri integrates wellness, sustainability, and heritage into one cohesive identity. “We never saw a brand that was made just to speak to us,” says Al-Rashed, emphasizing the brand’s mission to blend global performance standards with local relevance.



Cultural Relevance and Product Innovation:

Asteri’s signature desert-proof makeup is engineered for durability in the region’s harsh climate. All products are vegan, cruelty-free, and free of parabens and sulfates. The brand’s cultural authenticity is expressed through packaging adorned with Arabic calligraphy, lipsticks named after prominent Arab women, and retail environments inspired by regional aesthetics. “Our products don’t just perform, they reflect who we are,” Al-Rashed notes.

Technology also plays a central role. Asteri uses AI-driven tools like Match My Makeup to help customers accurately identify their ideal shades, increasing personalization and satisfaction. “Technology allows us to deliver inclusive experiences tailored to our community,” says Al-Rashed. Data insights gathered through customer relationship management (CRM) and loyalty platforms further allow the brand to personalize engagement and unify digital and physical touchpoints.

Sustainability and Strategic Growth:

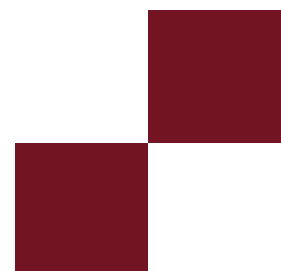
As a B Corp certified brand, Asteri embeds sustainability into its core strategy. The brand uses 80% recycled plastic in packaging and prioritizes refillable, recyclable components. Yet Al-Rashed acknowledges regional gaps in sustainability awareness. “Part of our role is educational, helping our community understand the

value of responsible beauty choices,” she says. The brand also aims to elevate local raw materials into high-quality beauty inputs, despite current limitations in manufacturing infrastructure.

Retail Evolution and Global Reach:

Asteri has flourished in traditional mall environments with strong beauty-focused footfall but it is closely monitoring the shift toward experience-driven, open-air retail. “These new formats offer powerful platforms for emotional connection and organic discovery,” says Al-Rashed. Within a year of launching online, Asteri opened six stores in Saudi Arabia and expanded into multiple locations in the GCC. Products quickly sold out, signaling both global demand and cultural pride.

With nine stores now across the Gulf, a skincare line in development, and deeper omnichannel strategies underway, Asteri exemplifies how a homegrown brand can merge beauty, lifestyle, and identity, while championing sustainability and innovation.





Wellness Tourism: The New Luxury Frontier

The powerful blend of wellness and fashion now gaining traction across Saudi Arabia links seamlessly with increased investment in wellness tourism. Aligned with Vision 2030's diversification goals, the country is building a network of luxury wellness resorts and retreats that fuse health, hospitality, and high fashion.

At the forefront is AMAALA, a Red Sea coastal development marketed as the world's first integrated family wellness destination. AMAALA offers medical spas, meditation villas, and farm-to-table dining aimed at high-spending tourists who might otherwise choose Bali or California. Local culture is woven in through Arabian aromatherapy and traditional healing techniques. Another example is AIUla Wellness Festival, which has also become a standout event, combining yoga sessions at heritage sites with under-the-stars spa experiences.

Fashion plays a subtle but vital role. From designer resort wear and custom skincare lines to curated retail galleries and luxury staff uniforms, these resorts blend wellness and aesthetics and invite guests to purchase items that extend the retreat experience to home.

As more visitors discover detox retreats, fashion-integrated wellness events, and desert luxury escapes, Saudi Arabia is positioning itself as a place where holistic living and luxury seamlessly converge. In the process, it is supporting sectors such as retail, beauty, and lifestyle, which in return provide a boost to the economy at large.

Consumer Behavior and Industry Innovation

Facilitating the rise of social media, fitness apps, and other innovations is the continuous advancement of technology. Today, global firms are piloting AI-driven sleep and wellness solutions, while fashion brands use data to tailor product offerings based on lifestyle insights.

Product unboxing and reviews are the most compelling forms of influencer content, cited by 51% of Saudi consumers, indicating that authenticity and firsthand experience significantly outweigh promotional content in driving consumer purchase decisions.³ These shifts, combined with technological innovation, support Vision 2030 goals by fueling non-oil sectors and creating high-value jobs. Yet they also demand industry adaptation.

Rising to the challenge, government bodies like the Fashion Commission and Monsha'at are supporting small and medium enterprises in wellness-aligned niches including sportswear, clean cosmetics, and sustainable design. International brands are responding too, with Saudi-exclusive drops and hotel-wellness integrations.

A Defining Force for the Future

As Saudi Arabia looks to the future, the convergence of wellness, lifestyle, and fashion is becoming a defining force in Saudi Arabia's cultural and economic evolution. Driven by a youthful population, women's empowerment, and openness to global trends, this fusion is reshaping consumer expectations and creating new opportunities for brands. From boutique fitness studios influencing athleisure to clean beauty aligned with self-care and wellness tourism infused with design and fashion, these intersecting trends are not passing fads, but structural shifts.

For businesses and investors, success lies in offering integrated, wellness-driven experiences that reflect both modern lifestyles and cultural authenticity. Saudi Arabia is crafting a new identity; one where fashion is not only about aesthetics, but about holistic living. In doing so, it is positioning itself as a regional leader and global innovator in the lifestyle economy.



11.

EMPOWERING SAUDI FASHION AND GLOCALIZATION

Saudi Arabia's fashion sector is undergoing a profound transformation under Saudi Arabia's Vision 2030, which prioritizes economic diversification and the cultivation of cultural industries. In this context, Saudi Arabia is nurturing an ecosystem where local brands and creative professionals

thrive at home and abroad, turning the Kingdom into a flourishing fashion hub rather than merely an import market. A new generation of Saudi designers and brands is achieving milestone successes, signaling the coming of age of Saudi's homegrown fashion labels.



Local Brands on Display

One of the clearest signs of progress in Saudi Arabia's fashion ecosystem is the expanding retail footprint of local designer brands. Just a few years ago, Saudi labels were rarely seen in stores. Today, they are increasingly present in malls, high streets, and concept boutiques. Multi-brand retailers like Rubaiyat and Harvey Nichols

Riyadh now dedicate space to local abaya and ready-to-wear designers, while concept stores like Urbn Lot and Personage stock Saudi streetwear alongside global labels.

Saudi designers are opening their own stores too. In 2025, streetwear label 1886 launched the most recent

flagship store in Riyadh's Solitaire mall and plans further expansion, while Ashi Studio opened a showroom in VIA Riyadh, with Saudi clients comprising 80% of its customer base.

Other Saudi brands have successfully expanded internationally, proving their global competitiveness. Leem, for example, entered prominent international retailers including Selfridges, Ounass, and Bloomingdale's, and opened its own store at Westfield London along with hosting a pop-up in Paris. Abadia has also gained international visibility. In addition to a presence on multiple online retail platforms, Abadia is being showcased at esteemed boutiques such as Luisa Via Roma and Ancote in Italy, as well as stores in San Francisco and New York, and Harvey Nichols in Dubai and

Kuwait. Notably, Saudi beauty brand Moonglaze, founded by influencer and entrepreneur Yara Alnamlah, became the first Saudi makeup label to launch at Selfridges London, marking a milestone for Saudi cosmetics on the global stage. Overall, retail points of sale for Saudi brands have grown significantly since 2020.

Further reinforcing the export potential of Saudi brands, recent franchise-focused initiatives have helped lay the groundwork for global expansion. During a key event, cooperation agreements were signed between the National Franchise Committee and international counterparts from countries such as the UK, South Korea, South Africa, and China. These efforts aim to support Saudi brands in entering new markets and attracting foreign investment. Locally, agreements with

entities like Monsha'at and the Social Development Bank are also enhancing the domestic franchise ecosystem, creating a stronger foundation for outward growth.

The Fashion Commission's ongoing support for Saudi brands is evident in its strategic partnership with the Cultural Development Fund and Selfridges London. Established in June of this year, the collaboration enabled a dedicated pop-up at Selfridges during the peak summer months, showcasing top labels from the Saudi 100 Brands program, such as Mona Alshebil, APOA, and Aram. This partnership reflects Saudi Arabia's growing fashion prominence and underscores the Commission's commitment to creating real global pathways for Saudi designers.



Saudi Arabia's fragrance market is projected to more than double, reaching USD 4.5 billion by 2029, fueled by cultural heritage and global demand.

Fragrance as a Glocal Success

Fragrance is a prominent domain where Saudi Arabia seamlessly blends local heritage with global business. Perfume holds a special place in Saudi culture, with scents like oud, amber, and rose deeply ingrained in daily life and ceremonies. This has given rise to a thriving fragrance industry that straddles traditional and modern, local and international. In 2024, the Saudi perfume retail market was valued at approximately USD 2.5 billion, with forecasts projecting it to reach USD 4.5 billion by 2029, representing a CAGR of approximately 12.5%.^{1 2}

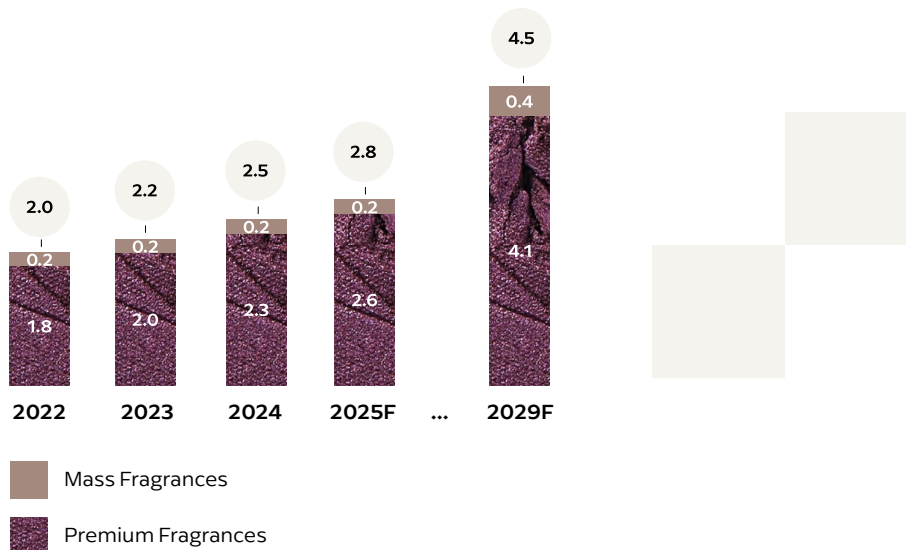


FIGURE 35
Fragrance Market in Saudi Arabia: Premium and Mass Segment Forecast, USD B^{1 2}

In this competitive category, homegrown companies hold their own against the world's top luxury perfume houses, commanding a significant chunk of the market. The top five perfume companies in

Saudi Arabia account for about 37% of sales, and four of those are local Saudi or regional players. Arabian Oud, founded in Makkah in 1982, leads with a 9.4% share in the local retail market and an estimated 900



points of sale worldwide, making it one of the largest fragrance retailers globally. Close behind are Abdul Samad Al Qurashi (7.5%) and Al Majed Oud (5.3%), both Saudi-based perfume powerhouses known for oud oils and bukhoor (incense).² Together, these heritage-rich brands have built an empire on scents that appeal to Arab preferences while also catering to global consumers seeking 'oriental' fragrances.

Global fragrance companies are also tailoring products to Saudi and GCC tastes. Nearly every major luxury perfume house now offers oud variants or exclusive Middle East editions. Jo Malone and Penhaligon's are prime examples of this localization strategy. Jo Malone's Taif Rose perfume is inspired by the iconic Saudi flower, and Penhaligon's AlUla is a tribute to Saudi Arabia's ancient heritage.

At the same time, Saudi consumers are increasingly drawn to more personalized and exclusive fragrance experiences, driving a parallel rise in customization and niche perfumery. Brands like Byredo, Le Labo, and emerging regional boutique houses are gaining loyal followings. Complementing this shift, the emergence of high-end fragrance concept stores such as O100 and Basenote is further cultivating demand for artisanal and indie scents that align with local identity and personal expression.

Adding a new dimension to the market is the digital transformation of fragrance retail. Traditionally, perfume is sold through physical retail, allowing customers to sample scents in person. However, Saudi Arabia's digitally connected consumers are challenging this norm. Survey findings reveal that 55% of Saudi consumers are comfortable purchasing perfumes online without sampling them first, reflecting a growing openness to discovery through digital channels.³

Golden Scent, a Saudi-founded e-commerce platform for beauty and fragrance, pioneered this shift. Launched in 2014, the platform has built one of the world's largest online libraries of Arabic, niche, and international perfumes. Social media influencers and perfume bloggers are central to this ecosystem, providing detailed reviews and driving fragrance trends through content that substitutes the sensory experience with trusted narratives and recommendations.

Saudi Arabia's fragrance industry blends heritage and innovation. The Perfume Museum in Riyadh showcases oud's cultural legacy, while local brands explore formats like solid perfumes, home scents, and sustainable agarwood cultivation. Meanwhile, collaborations, such as AJ Arabia's partnership with the French perfumer Jean-Claude Astier, highlight cross-cultural innovation. Strong regional exports and dominance in the premium segment also demonstrate that Saudi brands are gaining global traction.

As Saudi perfumiers grow their brands both at home and abroad, the government is recognizing fragrance as a key creative sector and is supporting the expansion of local labels in a variety of ways, including through export incentives. With creative talent and government support, the bond between fashion and fragrance is deepening, positioning Saudi Arabia as a globally influential player in luxury perfumery.



Saudi's Thriving Contemporary Apparel Market

The apparel market in Saudi Arabia continues to thrive, driven by cultural pride, modernization, and economic transformation. The market is projected to experience consistent growth over the coming years, expanding from USD 17.7 billion in 2022 to USD 23.5 billion by 2029,

reflecting strong and sustained consumer demand for apparel. Within this growth trajectory, womenswear remains a key segment, projected to grow from USD 8.3 billion in 2022 to USD 10.9 billion by 2029, highlighting the significant market opportunity in this category.

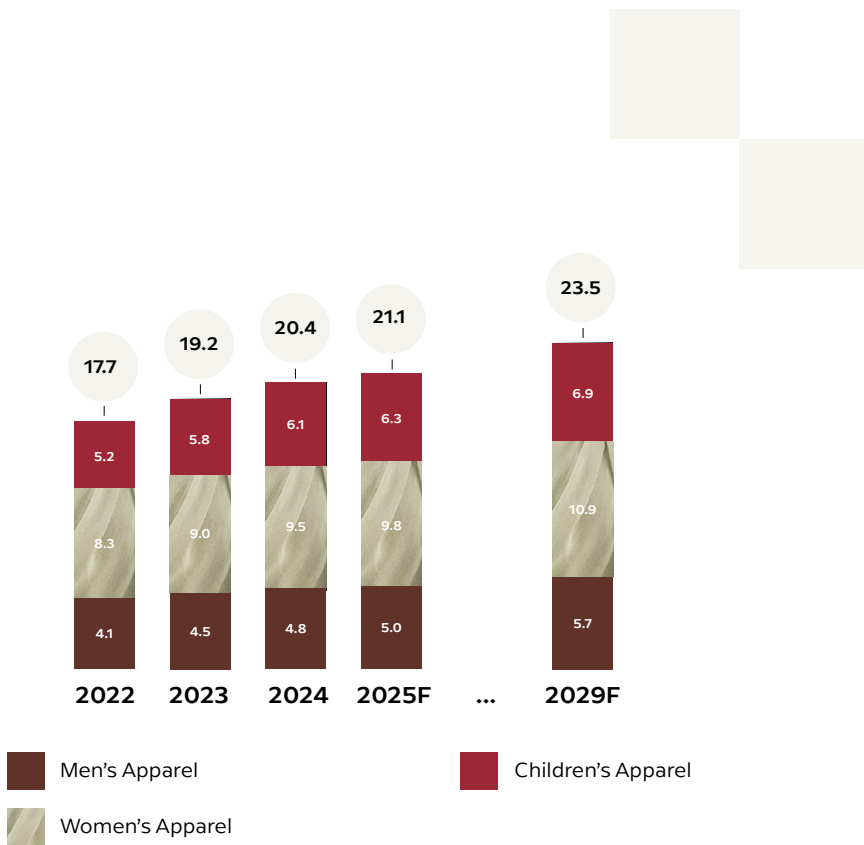


FIGURE 36
Saudi Apparel Market Overview: Men's, Women's, and Kids' Segments, USD B²

Saudi Arabia's fashion scene uniquely blends traditional styles with contemporary influences. Iconic garments like the thobe and abaya remain central to everyday and formal attire but they are evolving through innovative designs, colors, and materials

that appeal to younger generations. Millennials and Gen Z consumers gravitate toward streetwear, high-end luxury brands, and 'East meets West' designs. Understanding these trends, local brands flourish across different segments, from

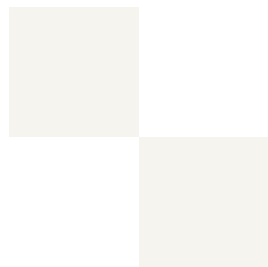


Hindamme's contemporary reinterpretations of traditional Saudi motifs to CARGO's minimalist, gender-neutral urban wear, and RealSelf's emphasis on sustainability and clean aesthetics.

Alongside the continued expansion of retail malls, Saudi Arabia is experiencing rapid growth in e-commerce, driven by the Kingdom's high internet penetration and a growing segment of consumers who are conscious of both quality and price. The widespread adoption of flexible payment options, particularly Buy Now, Pay Later (BNPL) services such as Tabby and Tamara, further

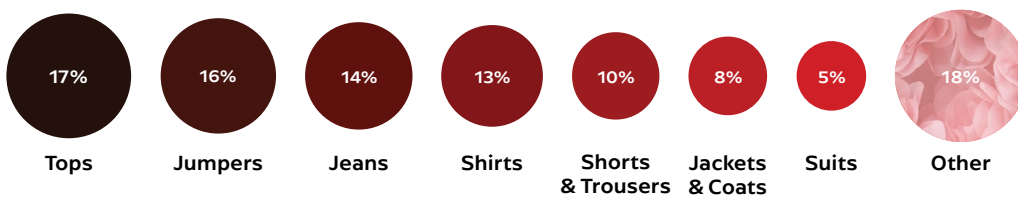
supports this digital shift by providing consumers greater ease and affordability in their online shopping experiences.

Simultaneously, brands are expanding their digital presence, launching and upgrading e-commerce platforms and mobile apps to facilitate seamless online shopping. For instance, Cenomi Group recently signed a memorandum of understanding (MOU) with Turkey's Trendyol to introduce an online fashion and lifestyle marketplace in the GCC region, highlighting the burgeoning opportunities in Saudi Arabia's digital retail landscape.



Outerwear apparel dominates, capturing ~80–85% of apparel retail, highlighting a strong focus area for consumer demand and growth.

Men



Women



FIGURE 37
Breakdown of Saudi Outerwear Retail Market by Gender, (% , 2024)²

Footwear Demand is Rising in Saudi Arabia's Active Market

Saudi Arabia's sports-driven transformation, aligned with Vision 2030, is significantly boosting demand for footwear. The Kingdom's growing youth population is increasingly engaging in marathons, fitness festivals, and athletic activities, driving the need for athletic and athleisure footwear. In 2024, the market was valued at USD 1.5 billion and is projected to reach USD 1.7 billion by 2029, growing at a steady 2.5% CAGR.²

While casual and athletic footwear dominate, product variety reflects both Western and local tastes. The market for women's shoes, including flats and dress options, is growing fast, while men's traditional sandals and children's shoes also maintain stable demand. Across genders and age groups, the footwear market is segmented as follows: ~30% women's, 50% men's, and 20% children's.²

The market remains largely import-based, with global giants and luxury brands leading in malls and multi-brand outlets. However, Al Bandar Trading Co continues to lead the footwear market in Saudi Arabia, with its Max brand ahead of international competitors like Adidas, Nike, and Puma. The recent entry of JD Sports into the market is expected to further intensify competition, particularly given the popularity of sports brands in the footwear category.

Local brands are also beginning to expand. Tamashee, a modernized heritage footwear brand, is catering to rising interest in traditional footwear and is now featured at Level Shoes.

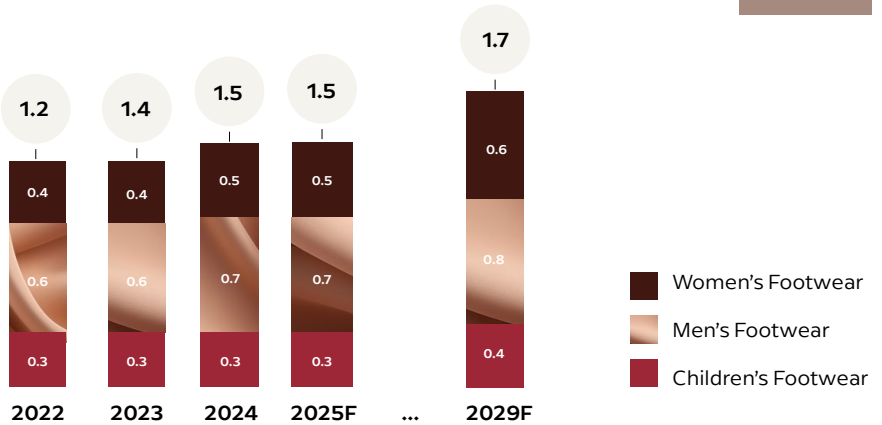


FIGURE 38 Saudi Footwear Market by Gender Segment, USD B²

Sports footwear accounted for nearly 30% of Saudi Arabia's total footwear market in 2024, with steady growth expected across performance, outdoor, and lifestyle segments, reaching USD 0.55 billion by 2029.

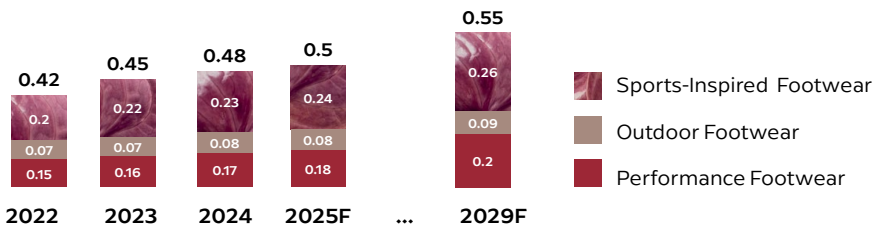


FIGURE 39 Saudi Sports Footwear Market by Category, USD B²



Fashion is no longer a peripheral industry, it's a national priority, driving economic diversification, export potential, and cultural influence under Vision 2030.



Glocal Potential: Taking Saudi Creativity to the World

As Saudi Arabia's fashion and lifestyle brands build strong foundations locally, there is a significant untapped opportunity to scale globally by offering designs rooted in cultural authenticity. Success stories like Nuun Jewels, founded by HRH Princess Nourah Al Faisal, point the way forward. Rather than leaning on superficial motifs, the brand exemplifies how heritage can be meaningfully embedded into design by focusing on cultural practices, how jewelry is worn, why it's worn, and what it symbolizes. According to HRH Princess Nourah, Saudi brands looking to expand internationally must have "a clear point of view and something to say." In doing so, they avoid trend-chasing and instead lead with storytelling and identity, universal qualities that resonate across borders.

With Saudi designers gaining visibility and consumers increasingly valuing authenticity, the stage is set for a new wave of globally relevant, culturally rich Saudi brands that define rather than follow global fashion narratives.

12.

TECH-DRIVEN FASHION: BUILDING THE DIGITAL AND INNOVATION ECOSYSTEM

Innovation is no longer optional, Saudi Arabia is building a fashion ecosystem where data, design tech, and AI define the next wave of competitiveness.

Saudi Arabia's fashion industry is entering a new era, where innovation, data, and emerging technologies are converging to redefine how brands are built, products are developed, and consumers are engaged. From digital design labs to AI-driven retail personalization, the Kingdom is laying the foundations for a future-forward, tech-enabled fashion ecosystem.

In the Young Fashion Professionals Survey, 30% of respondents identified brand building as the most critical skill for future success in the Saudi fashion industry, followed by trend forecasting (15%), e-commerce (15%), and digital design (14%). This highlights a clear industry focus on strategic identity, market foresight, and digital fluency.



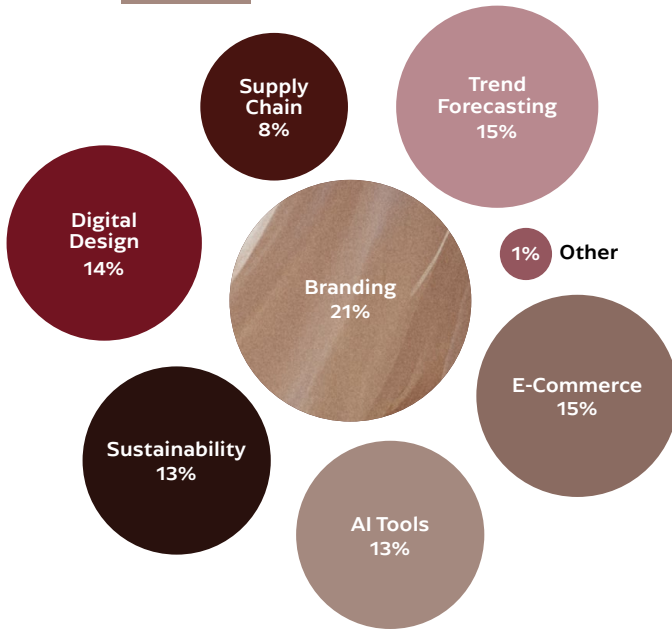


FIGURE 40 Emerging Skill Demands in the Evolving Saudi Fashion Ecosystem (%)¹⁴



From digital design labs to smart retail and fashion AI, Saudi Arabia is investing in the tech tools that will shape global fashion's future.

Innovation Ecosystem: From Vision to Activation

At the heart of this transformation is a growing commitment from both the public and private sectors to support innovation. A case in point is Chalhoub Group's Fashion Lab accelerator, which offers mentorship, business training, and market access to promising Saudi fashion startups. Launched in partnership with the Saudi 100 Brands program, the initiative has already doubled its scale since its first cohort, signaling rising demand for structured innovation support. "After the great success of the first cohort ... we are expanding our perks for the next batch of Saudi brands," notes Chalhoub's Chief Innovation Officer, emphasizing the

company's unwavering commitment to fostering innovation and excellence on the Saudi fashion scene.⁹

Through surveys and industry feedback, Saudi brands have voiced a strong appetite for experimentation, but also a need for support infrastructure. Key priorities include funding and grants for R&D, access to shared innovation facilities such as material research labs or tech testing centers, and participation in accelerator programs that provide mentorship and networking.²⁶ This shift reflects a broader mindset change across the Saudi fashion landscape: innovation is no longer a buzzword but a strategic imperative for competitiveness and global relevance.

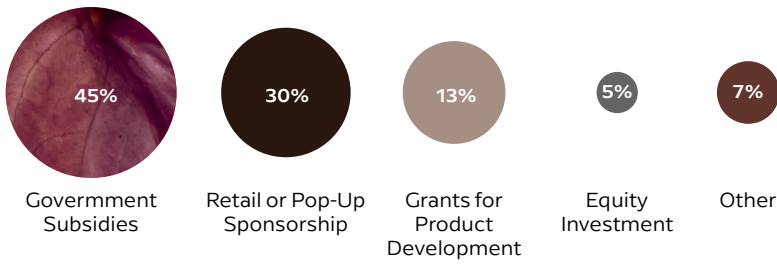


FIGURE 41
Preferred Financial Support Mechanisms Among Saudi Fashion Brands (%)²⁶

Commenting on the topic of innovation, HRH Princess Nourah Al Faisal, says: “Innovation funding must go beyond capital; it must be strategic, structured, and knowledge driven. There is an opportunity to develop cross-ministerial programs that not only fund startups but also equip founders with essential business literacy, finance, legal frameworks, VAT registration, and export logistics. Empowering creatives to become capable entrepreneurs is a critical, yet often overlooked, dimension of innovation capacity.”

HRH Princess Nourah also draws attention to a valuable gender dynamic within the sector: while most fashion design graduates are women, many fashion entrepreneurs are men. This suggests a need, and an opportunity, for policies and programs that recognize diverse entry points into the industry and that provide tailored support for both creative and business tracks.



Emerging Technologies in Design and Production

On the innovation front, a notable development is the gradual adoption of cutting-edge design technologies by Saudi fashion designers and companies across the industry value chain, with global examples and experiments now emerging.

3D Design and Sampling:

Designers are increasingly using 3D modeling software to create digital samples of garments. This technology allows clothes to be designed on a virtual avatar with realistic drape and fit, eliminating some of the physical prototyping. In the Digital Fashion Program, students learned to use CLO3D, a fashion design software that enables them to visualize garments in true-to-life simulation and make quick changes. By using 3D sampling, designers can also reduce fabric waste and speed up the design cycle, which are notable advantages for young brands with limited budgets. Some brands have also begun showcasing digital-only fashion pieces on Instagram; essentially 3D renders of outfits that exist virtually to gauge customer interest before committing to production.

AI-Assisted Design:

Brands are using AI for trend forecasting, design ideation, and inventory planning. AI-powered tools analyze social media and sales data to predict demand and optimize size ranges, minimizing leftover stock and improving efficiency. Designers are also experimenting with generative AI as a creative partner for prints, silhouettes, and color schemes.

For example, designer Norma Kamali, in collaboration with AI studio Maison Meta, uses generative AI trained on decades of her archives to inspire fresh prints, color palettes, and forms, demonstrating how AI can serve as both an analytical and creative tool in the design process.

Virtual Models and Digital Runways:

Startups such as Doji are developing digital avatars for use in product showcases, e-commerce, and virtual fashion shows, which briefly surged in popularity during the COVID-19 years. Post-pandemic, there is interest in hybrid fashion shows, which take the form of physical events with an AR or VR component for remote audiences.

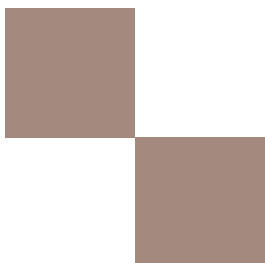
For instance, H&M recently debuted a virtual model, a digital twin of real-life model Mathilda Gvarliani, in its advertising campaigns, highlighting how AI-generated avatars can reduce production costs and carbon footprint while enabling remote personalization and immersive e-commerce experiences.

3D Printing and Smart Materials:

The nation's strength in petrochemicals could further intersect with fashion through collaborations between engineers and designers to develop high-performance textiles like moisture-wicking and cooling fabrics for hot climates, or sustainable materials based on recycled or bio-based inputs. As one example, Saudi designer, Ghaydaa Majdaly, is taking a zero-waste approach by using 3D technology to transform recycled plastic bottles into fabric.

Blockchain for Transparency and Traceability:

Blockchain is emerging as a key tool for supply chain transparency and anti-counterfeiting in fashion. By recording every step of a garment's journey, from raw material to retail, in an immutable digital ledger, brands can offer consumers greater visibility into ethical sourcing, production standards, and sustainability claims. Luxury brands like LVMH, Prada, and Cartier have already adopted blockchain via the Aura Blockchain Consortium, while smaller labels are using platforms like Provenance and Everledger to authenticate limited-edition drops and non-fungible tokens (NFTs).



Away from apparel, there is a convergence of beauty and fashion tech in the Kingdom. L'Oréal, for instance, has emphasized its strategic ambition to lead the beauty tech revolution in the Middle East, aligning closely with Saudi Arabia's Vision 2030. In February this year, L'Oréal participated in the Leap 2025 technology conference, introducing over 20 innovations in personalization, diagnostics, and consumer recommendations. Among these innovations are AI-driven tools like Spotscan for acne diagnosis, UV Camera for visualizing sun damage, and Scalp Consult

for tailored haircare routines. Such examples underscore the broader potential for technological cross-pollination within Saudi Arabia's emerging fashion and beauty ecosystem.

Smart Retail: Experience Meets Efficiency

Tech innovation extends beyond design into the retail experience. Brands and malls are embracing solutions that enhance engagement, streamline operations, and personalize shopping journeys.

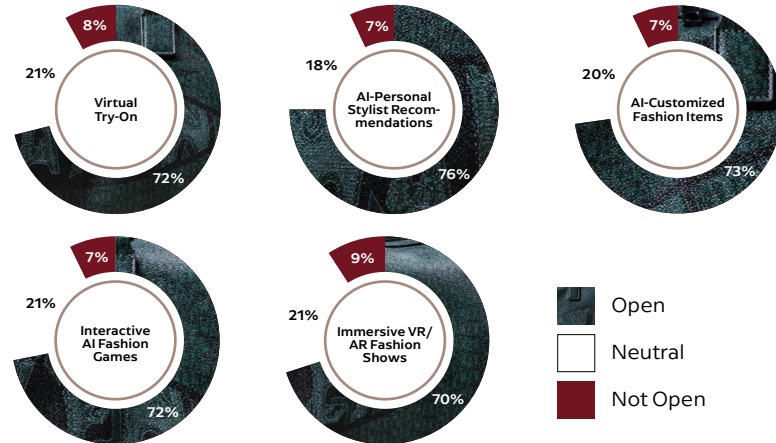


FIGURE 42 Saudi Consumers' Readiness for AI-Enhanced Fashion Experiences (%)²

Augmented Reality Try-Ons: AR mirrors and mobile apps are allowing consumers to visualize fashion items on their bodies without changing clothes. This has already become commonplace in beauty retail and is expanding into apparel and accessories.

AI-Personal Stylist Recommendations: AI-powered recommendation engines are becoming more sophisticated, offering personalized outfit suggestions based on a shopper's browsing history, purchase behavior, and body type.

Customized Fashion Items Designed by AI:

As artificial intelligence becomes more integrated into design workflows, consumers are being offered options to co-create fashion items by selecting colors, cuts, or patterns generated and refined by AI models.

Interactive AI-Based Fashion Games or Platforms:

Blending entertainment and shopping, gamified platforms powered by AI let users engage with fashion in playful, immersive ways. Whether through avatar styling challenges, fashion quizzes, or virtual brand experiences, these tools are beginning to appear across Saudi fashion marketing campaigns.

Virtual Reality Shopping and Fashion Shows:

Though still experimental, some retailers have piloted virtual stores with 360-degree tours. Future use cases may include fully immersive virtual malls or social VR shopping experiences, where friends browse collections together from different locations.

Data as a Strategic Advantage

Saudi Arabia's consumer base is evolving. Today's shoppers are young, digitally savvy, and increasingly vocal about what they expect from brands. The landscape is defined by post-pandemic behavioral shifts, fluid patterns of brand loyalty, rising price sensitivity, and a growing demand for cultural relevance. In the fashion sector, understanding these trends and the Saudi audience through data-driven insights has become a core strategic imperative. Intuition and global playbooks alone are no longer sufficient; decisions around product launches, pricing, and loyalty strategies now rely on a deep understanding of local consumer behavior and sentiment. Local and international brands are responding by leveraging consumer data to tailor merchandising, pricing, and localization strategies specifically to the Saudi market.

How Brands Are Leveraging Data

Brands are turning to analytics and big data to inform their strategies across key areas as outlined below:

Merchandising and Assortment:

Brands in Saudi Arabia use data from point-of-sale (POS) systems, e-commerce analytics, and social media to determine which products to stock. If there is a surge in searches or mentions of 'A-line abaya' brands take note, just as they notice a 20% quarter-over-quarter rise in athleisure sales and shift inventory to meet demand. Global brands also localize their assortments based on Saudi-specific insights. For example, a brand may learn that embellished styles perform better in the Kingdom than minimalist versions that sell in Europe. Such insights, derived from regional sell-through rates, shape merchandising decisions in near real-time.



Sizing and Localization:

Returns from online purchases reveal important sizing insights. If a specific item is frequently returned because it runs small, the brand can adjust future production. Some companies develop Saudi-specific size charts when data shows that local averages differ from global norms. Feedback and sales data also influence product design. For example, if long-sleeved versions of a product consistently outsell others, brands may create related capsule collections. Brands like Zara and H&M rapidly respond to trends through daily sales data; if a style sells out quickly in Riyadh, similar items are quickly restocked.

Pricing Strategy:

Historically, Saudi prices were high due to import costs and limited competition. However, with increasing competition and consumer awareness, brands have turned to dynamic pricing. They use market intelligence, competitor pricing, currency trends, and sales data to make adjustments. For example, if a collection underperforms in Saudi Arabia compared to the UAE, brands may initiate earlier markdowns locally. Conversely, high-demand items such as limited-edition sneakers may command premium pricing based on search trends and pre-order data. Luxury brands typically avoid direct price adjustments but offer VIP-specific bundles or added perks based on CRM insights. The 15% VAT

introduced in recent years has also influenced pricing strategies, with many brands absorbing costs or increasing promotions to maintain appeal. Data analysis on price elasticity helps determine optimal pricing thresholds.

Promotions and Markdown Optimization:

Retailers now use historical data to fine tune promotion strategies. For example, analysis may show that flash sales attract a different demographic, such as value-driven shoppers who wouldn't normally buy, thus boosting overall revenue. However, excessive discounting can erode brand equity and train consumers to wait for sales. Algorithms now guide markdown strategies by analyzing inventory turnover, product age, and demand. This is why some items go on sale after a few weeks, while others never see a discount. Saudi Arabia's retail calendar, shaped by seasons like Ramadan and summer travel, further informs promotional timing.

Marketing and Channel Allocation:

Brands allocate marketing budgets based on customer acquisition data. Instagram may bring younger, casual shoppers, while Google search attracts high-intent buyers. This insight guides channel investment, with more search ads for conversions and more social spend for brand building. For its part, geospatial analysis of sales data helps identify underserved areas.

If online orders spike from a city with no store, that may prompt expansion or local partnerships. Sentiment analysis also plays a role; scanning social platforms for brand mentions and tone helps brands measure campaign effectiveness or address backlash. Altogether, consumer data shapes everything from inventory and pricing to messaging and store strategy.

To conclude, as Saudi Arabia's fashion industry advances into a tech-forward future, the integration of innovation across design, production, retail, and data strategy is no longer a luxury; it is a necessity. The convergence of government support, global partnerships, and homegrown ambition is forging a dynamic innovation ecosystem where creative risk-taking is encouraged and digitally fluent talent is emerging. To sustain this momentum, the ecosystem must continue to evolve through targeted investment in shared R&D infrastructure, acceleration programs, and bold collaborations between engineers, designers, and technology innovators. As brands increasingly compete on speed, personalization, and creativity, Saudi Arabia is poised not just to adopt global trends but to set them. Innovation is not an add-on; it is the competitive edge that will define the Kingdom's fashion identity on the global stage.

Glossary

AI	Artificial Intelligence
AR	Augmented Reality
BNPL	Buy Now, Pay Later
BUA	Built-Up Area
CAD	Computer-Aided Design
CAGR	Compound Annual Growth Rate
CPI	Consumer Price Index
CRM	Customer Relationship Management
EIU	Economist Intelligence Unit
ESG	Environmental, Social, and Governance
FY	Financial Year
GCC	Gulf Cooperation Council
GDP	Gross Domestic Product
GLA	Gross Leasable Area
GVA	Gross Value Added
IFM	Institut Français de la Mode
JV	Joint Venture
KAUST	King Abdullah University of Science and Technology
MISA	Ministry of Investment
MOU	Memorandum of Understanding
NFT	Non-Fungible Token
POS	Point of Sale
QOLP	Quality of Life Program
R&D	Research and Development
RFW	Riyadh Fashion Week
ROI	Return on Investment
RTW	Ready-to-Wear
UAE	United Arab Emirates
USD	United States Dollar
VAT	Value Added Tax
VIP	Very Important Person
VR	Virtual Reality
Wrth	The Royal Institute of Traditional Arts

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