

2280

Governance: A

ALMARAI

Almarai Co.

46.10 SAR / Share

As of: May 28, 2026

18.8x P/E RATIO Trailing 12 Months	2.2x P/B RATIO Price to Book Value	2.2% DIVIDEND YIELD Annual Dividend / Share	46.10B SAR MARKET CAP Total Valuation	0.84 BETA Systematic Risk Index	10.9% NET MARGIN Net Profit / Revenue
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Company Profile

Almarai Company is a Saudi Joint Stock Company and a major integrated consumer food and beverage group in the Middle East, with a leading market share in Saudi Arabia. The Group's operations encompass dairy, fruit juices, and related food products under brands like Almarai, Beyti, and Teeba; bakery products under L'usine and 7 Days; poultry under Alyoum and AlBashayer; seafood under Seama; ice cream; infant nutrition under Nuralac and Evolac; and drinking water under Oska and Ival. Almarai operates a vertically integrated business model, including arable farms in Argentina and the USA (Fondomonte), poultry grandparent farming, and value-added meat and poultry processing. The Group maintains an extensive distribution network across the GCC, Egypt, and Jordan, utilizing a long-haul distribution fleet and local distribution centers.

The Story

"Almarai is a vertically integrated consumer staple powerhouse that leverages a massive regional distribution network and diversified food portfolio to deliver consistent value creation."

Financial Metric	Value
Return on Capital (ROIC)	10.9%
Debt-to-Equity Ratio	30.7%
Sustainable Growth Rate	+2.8%

Growth Story

Almarai has demonstrated a consistent upward trajectory in revenue, growing from 19.58 billion SAR in fiscal 2023 to a TTM figure of 22.46 billion SAR. This expansion is underpinned by a sustainable growth rate of 2.79%, fueled by a disciplined five-year average reinvestment rate of 25.54%. The company's growth... [\[Read full story\]](#)

Corporate Governance Profile

Rating: A

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Profitability Dynamics

This positive spread of 4.25% confirms that Almarai is a consistent value creator. With a TTM operating margin of 13.63% and a net profit margin of 10.94%, the business demonstrates strong cost control despite the complexities of managing biological assets and international arable operations. The integrated nature of... [\[Read full story\]](#)

Risk & Capital Structure Factors

Almarai's risk profile is characterized by the defensive nature of the consumer staples sector, reflected in its relatively low leveraged beta of 0.76. However, the company carries a significant debt load of 14.14 billion SAR, which requires careful management of interest obligations. Beyond financial leverage, the... [\[Read full story\]](#)

