Euromonitor International

Full-service Restaurants in The Middle East and Africa

March 2023

INTRODUCTION

Scope
Key findings

REGIONAL OVERVIEW

Decline in full-service restaurants across the Middle East and Africa
Full-service restaurants are recovering by 2025
UAE is the first market to fully recover after pandemic
The region relies on Middle Eastern cuisine and develops strong interest in pizza
Middle Eastern full-service restaurants witnesses highest absolute decline
UAE is the only country with positive absolute value growth
Standalone restaurants in the Middle East were a core location to rely on during pandemic
Retail restaurants benefit from modernisation and urban investments

LEADING COMPANIES AND BRANDS

FSR is widely fragmented within the Middle East and Africa
Spur Corp continues to lead FSR
Two big markets, UAE and Saudi Arabia, are main sources of sales for the largest companies
Keeping outlets and following new trends helped big brands to sustain their ranking

FORECAST PROJECTIONS

Saudi Arabia and UAE will contribute 80% of sales growth by attracting tourists and expats
Small markets will sustain growth through expanding populations and developing e-commerce

COUNTRY SNAPSHOTS

United Arab Emirates: Market context
United Arab Emirates: Competitive and retail landscape
Saudi Arabia: Market context
Saudi Arabia: Competitive and retail landscape
Israel: Market context
Israel: Competitive and retail landscape
South Africa: Market context
South Africa: Competitive and retail landscape
Egypt: Market context
Egypt: Competitive and retail landscape
Nigeria: Market context
Nigeria: Retail landscape
Morocco: Market context
Morocco: Competitive and retail landscape

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For more information on this report, further enquiries can be directed via this link www.euromonitor.com/full-service-restaurants-in-the-middle-east-and-africa/report.