



# Full-service Restaurants in The Middle East and Africa

March 2023

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## 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

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Egypt: Competitive and retail landscape

Nigeria: Market context

Nigeria: Retail landscape

Morocco: Market context

Morocco: Competitive and retail landscape

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