

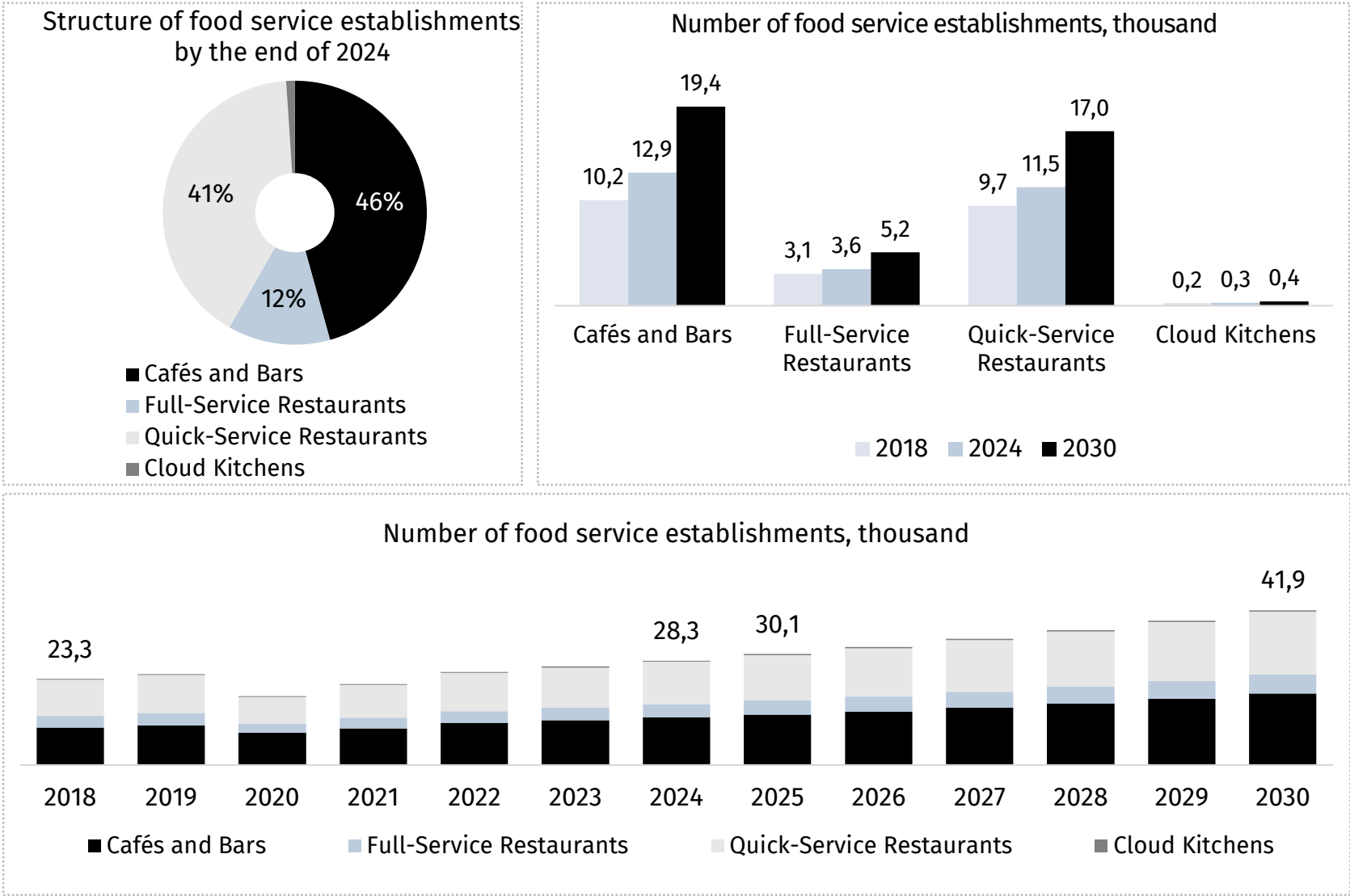
HoReCa Study

United Arab Emirates

Jun 2025



OVERVIEW OF THE FOOD SERVICE MARKET



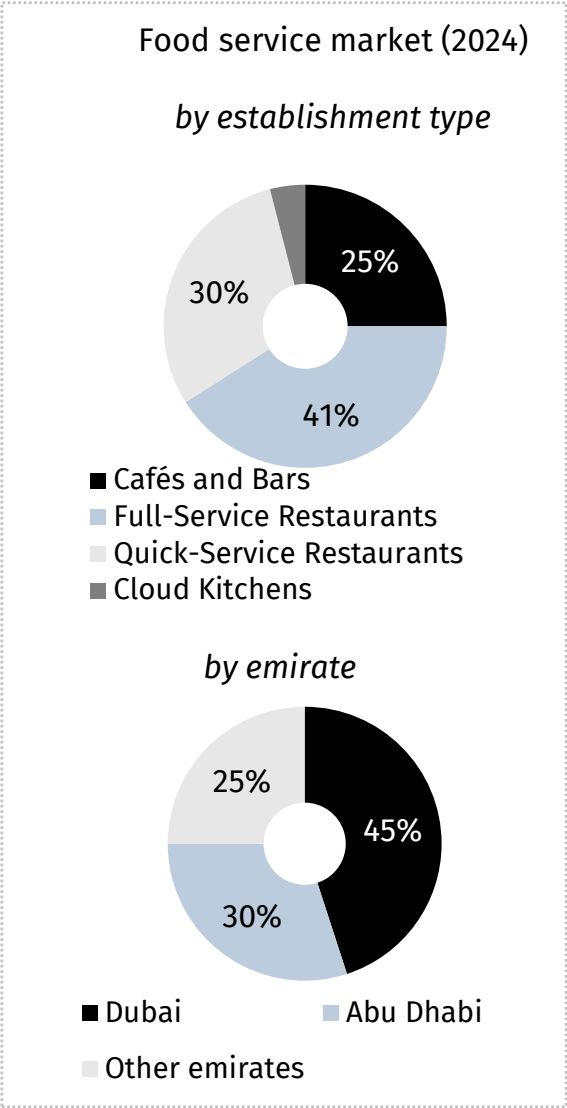
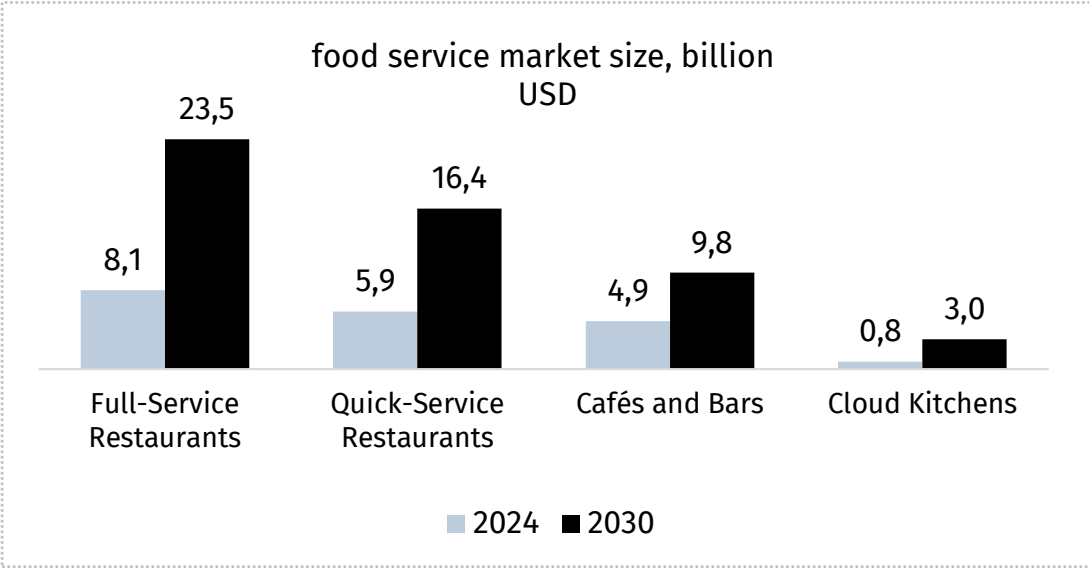
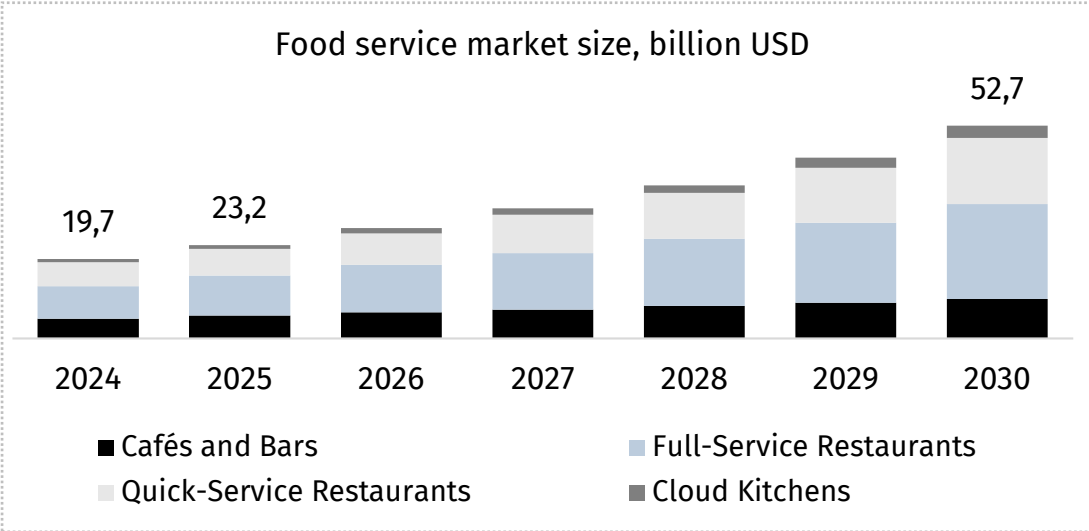
The UAE food service market is highly dependent on the country's strong tourism sector and diverse expatriate population, which together create a multicultural food ecosystem.

The market is witnessing a transformation of restaurant concepts and operational models. Establishments are beginning to repurpose existing restaurant spaces, eliminating dining areas in favor of expanded kitchen facilities to better serve the growing online food delivery market. The emergence of hybrid models reflects the industry's response to changing demands within the UAE's food sector.

Between 2025 and 2030, the number of food service establishments is expected to increase at an average annual growth rate of 6.8%.

Sources: Mordor Intelligence, BlueWeave consulting, ASER

OVERVIEW OF THE FOOD SERVICE MARKET



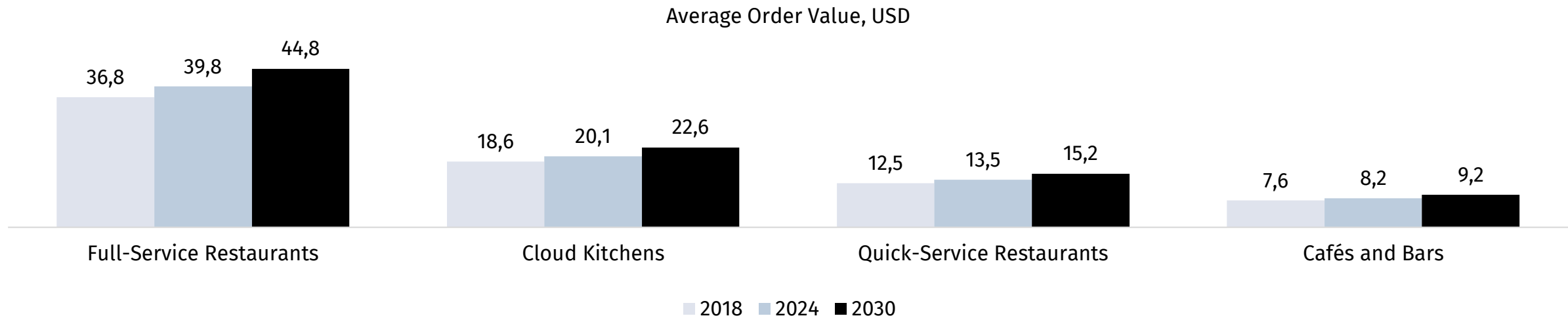
The market demonstrates steady growth driven by rising tourism, digitalization, and changing consumer preferences.

From 2025 to 2030, the UAE food service market is expected to grow at a compound annual growth rate (CAGR) of 17.8%, with segment growth by establishment type as follows:

- Full-Service Restaurants – 18.8%
- Quick-Service Restaurants – 20.1%
- Cafés and Bars – 12.9%
- Cloud Kitchens – 19.3%

Sources: Mordor Intelligence, BlueWeave consulting, ASER

OVERVIEW OF THE FOOD SERVICE MARKET



The average order value in UAE establishments is expected to increase by approximately 2% annually during the 2025–2030 period.

The highest average order value is observed among full-service restaurants compared to other types of food service establishments. This is due to the steady influx of tourists who prefer to enjoy local cuisine and visit smaller, unique venues. Popular dishes offered in full-service restaurants include stuffed camel and al-mahboos.

The order value for cloud kitchens is expected to grow at the fastest rate in the country. Cloud kitchens have simplified the ordering process for customers. They often collaborate with third-party delivery apps or websites or operate their own ordering platforms. In Dubai, ordering food via apps is a common practice, with more than 60% of people preferring to place orders through applications.

In the UAE fast-food industry, restaurants with roots in the United States dominate, accounting for over 90% of the non-traditional market. Popular fast-food chains in the country include Burger King, McDonald’s, KFC, Pizza Hut, as well as local fast-food vendors such as shawarma and chicken breast outlets, which represent both traditional and modern fast-food establishments.

Source: Mordor Intelligence

FOOD SERVICE MARKET PLAYERS

Full-Service Restaurants



Quick-Service Restaurants



Cafés and Bars



Cloud Kitchens



FOOD SERVICE MARKET PLAYERS



Al Khaja Group

A large business conglomerate in the UAE specializing in various sectors, including restaurant operations, fashion retail, and smart electronics. The company's restaurant brands include About Al Safeer Arabic Restaurant, Hatam Restaurant, Fish & Co, and Halla Kababi Restaurant.

Locations: Abu Dhabi, Dubai, Ajman, Sharjah



La Dame De Pic Dubai

Located on the 25th floor of the luxury One&Only One Za'abeel hotel, this restaurant occupies a space within the famed suspended gallery, The Link. The restaurant's name is linked to Chef Anne-Sophie Pic, who earned Michelin stars both in Paris and Dubai.

Location: Dubai



Americana Restaurants

A major quick-service restaurant operator founded in Kuwait, operating in the MENA region and neighboring countries including Kuwait, Iraq, Saudi Arabia, Jordan, Kazakhstan, Egypt, and the UAE. The network is owned by Saudi Arabia's sovereign investment fund.

Location: All Emirates of the UAE

TRENDS IN THE FOOD SERVICE MARKET

The market is growing, driven by a rapidly expanding tourism sector, high disposable incomes, and increasing demand for diverse dining options.

The diverse population of the UAE has led to rising demand for a wide range of cuisines—from traditional Middle Eastern dishes to international fare and American fast food.

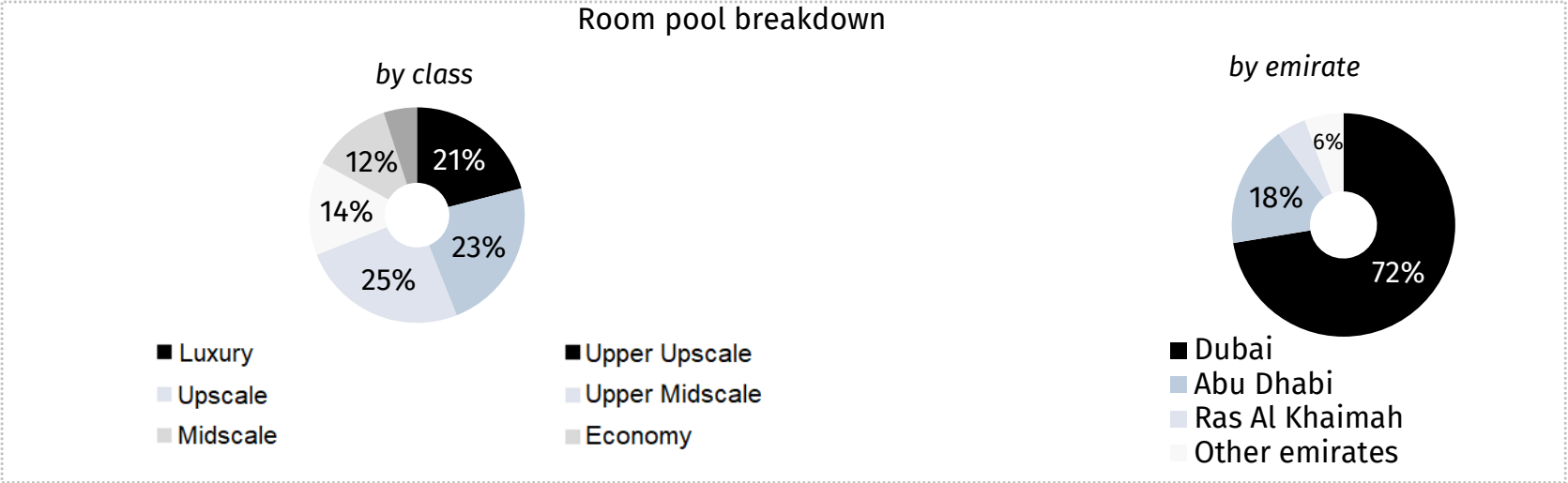
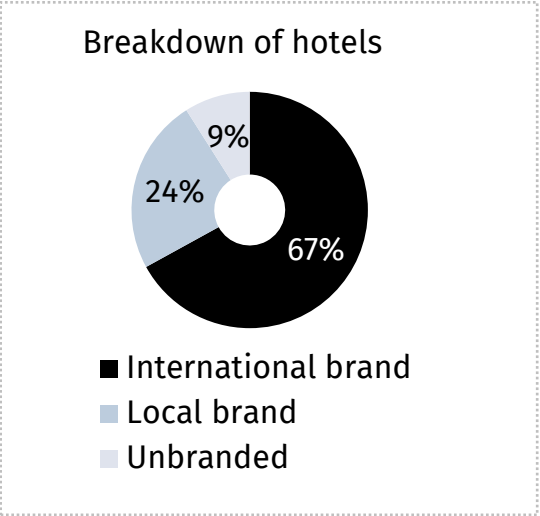
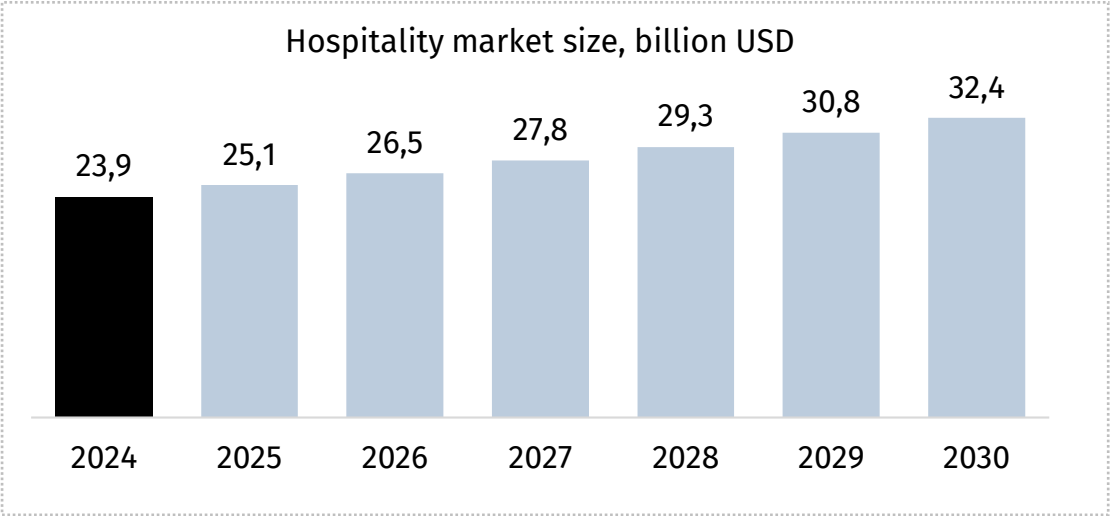
Consumer preferences are shifting toward healthier and more convenient food options, while food delivery services and technological innovations play a significant role in shaping the UAE food service market.

Food hall concepts are gaining popularity in large shopping malls due to growing consumer demand for variety and quality in convenient settings.

There is increasing demand from customers for unique, sophisticated, and exclusive dining experiences. Independent, non-chain establishments have gained popularity by offering personalized service, bespoke menus, and distinctive local character that resonates strongly with both UAE residents and tourists.

Government initiatives aimed at stimulating the hospitality and tourism industries further support market expansion.

OVERVIEW OF THE HOSPITALITY INDUSTRY



The hospitality industry in the UAE is continuously evolving, driven by the growth of the country's travel and tourism sector. According to the World Travel & Tourism Council, 2024 was a record year, contributing approximately AED 220 billion, or 12.4%, to the UAE's GDP.

The hospitality industry's value as of 2024 is estimated at USD 23.9 billion. It is expected that the market will grow at an average annual rate of 5.2% between 2025 and 2030, reaching USD 32.4 billion by 2030.

There are more than 1,000 hotels operating in the UAE, with a total inventory of 211,600 rooms. Occupancy rates are approximately 76%.

It is expected that the majority of new hotels (around 80%) will be international brands, offering upscale hotels to the market.

Sources: IMARC Group, Knight Frank, STR Global

HOSPITALITY INDUSTRY PLAYERS

5-Star Hotels



4-Star Hotels



3-Star Hotels



2-Star Hotels



HOSPITALITY INDUSTRY PLAYERS



Jumeirah Group

Jumeirah Group is a large international company specializing in hospitality and development. The group is part of Dubai Holding, which in turn is owned by Sheikh Mohammed bin Rashid Al Maktoum. Jumeirah manages hotels, resorts, restaurants, and other real estate assets worldwide, primarily in the Middle East, Europe, and Asia.

Location: Dubai



Emaar Hospitality Group

Emaar Hospitality Group is a subsidiary of Emaar Properties, a well-known Dubai developer, that owns and manages a diversified portfolio of hotel assets and brands. The company was founded in 2007 and specializes in creating premium hotels, luxury resorts, and other hospitality properties, including hotels under the brands Address Hotels + Resorts, Vida Hotels and Resorts, Armani Hotel.

Locations: Dubai, Al Fujairah, Umm Al Quwain



Hilton Worldwide Holdings Inc

Hilton Worldwide Holdings Inc. is a large American multinational company specializing in hospitality. It manages and franchises various hotels, resorts, and timeshares. Founded in 1919, the company has expanded and now owns and manages over 8,400 properties and 1.25 million rooms across 140 countries.

Locations: Abu Dhabi, Dubai, Ras Al Khaimah, Al Fujairah

HOSPITALITY INDUSTRY PLAYERS



Rotana Hotel Management Corporation PJSC

Rotana is a global corporation founded by UAE nationals, currently operating in hospitality, franchising, information technology, and other sectors. The company's first hotel, Beach Rotana, opened in Abu Dhabi in 1993. Currently, Rotana manages hotels under the following brands: Rotana Hotels & Resorts, Arjaan Hotel Apartments, Rayhaan Hotels & Resorts, Centro Hotels, Edge by Rotana, and The Residences by Rotana. More than 40 new hotel projects are currently under development.

Locations: Abu Dhabi, Al Ain, Dubai, Fujairah, Mirfa, Ras Al Khaimah, Sharjah



HYATT

Founded in the USA in 1957, Hyatt expanded to the UAE in 1980 with the opening of The Hyatt Regency Dubai. The company's portfolio includes over 1,000 hotels across approximately 75 countries and six continents. Its diverse portfolio ranges from luxury hotels to budget apartment hotels.

Locations: Abu Dhabi, Dubai



Sofitel Hotels and Resorts

Sofitel is a luxury hotel chain owned by the French company Accor, known for high quality, sophistication, and attention to detail. The chain operates hotels in Europe, Asia, the Americas, Arabian Peninsula countries, Africa, Australia, and New Zealand.

Location: Dubai

MARKET PLAYERS

Entity	Year Founded	Country of Incorporation	Number of Properties in the UAE	Key Properties in the UAE	Segment Level	Target Audience
Jumeirah Group	1999	UAE	12+	Hotels: Burj Al Arab, Madinat Jumeirah, Zabeel Saray	Luxury / Ultra-Luxury	VIP clients, affluent families
Emaar Hospitality Group	2007	UAE	15+	Hotels: Address, Vida, Armani Hotel, The Palace	Premium	Tourists, business clients, families
Hilton Worldwide Holdings Inc	1919 (in the UAE since 1973)	USA	36	Hotels: Conrad, Waldorf Astoria, Hilton, DoubleTree, Curio, Hampton	Mid to Luxury	All segments: business, tourism, families
Al Khaja Group	1983	UAE	8+	Hotels: Hatam, The Pizza Company, Gloria Jean’s coffees	Mid / Upper Mid	Youth, families, locals and expats
Americana Restaurants	1964	Kuwait	605+	Restaurants: KFC, Pizza Hut, Hardee’s, TGI Friday’s, Costa Coffee, etc.	Economy – Mid	Families, youth, office workers, tourists
La Dame De Pic Dubai	2024	France	1	Restaurant: La Dame de Pic (One&Only Za’abeel)	Ultra-luxury (fine dining)	Gourmets, fine dining enthusiasts
Sofitel Hotels and Resorts	1964	France	6+	Hotels: Sofitel The Palm, The Obelisk, Downtown, Abu Dhabi Corniche	Luxury	Tourists, business clients
Rotana Hotel Management Corporation PJSC	1992	UAE	35+	Hotels: Rotana, Arjaan, Centro, Rayhaan, Edge	Economy – Premium	Budget tourists, businessmen, families
HYATT	1957	USA	10+	Hotels: Grand Hyatt, Park Hyatt, Andaz, Hyatt Regency, Hyatt Place	Mid – Luxury	Premium clients, businessmen, tourists

TRENDS IN THE HOSPITALITY INDUSTRY

The hospitality market of the United Arab Emirates is experiencing significant growth driven by a stable tourism sector, which has become a cornerstone of the country's economic development strategy.

The luxury hotel segment continues to dominate the UAE's hospitality industry, owing to the UAE's reputation as a leading destination for luxury travel, especially in Dubai and Abu Dhabi.

Hotels are beginning to use artificial intelligence to analyze guest preferences and create personalized offers.

Significant investments in airports and conference centers, as well as visa regime reforms and marketing campaigns, are increasing visitor numbers and supporting growth in the hospitality sector.

Hotels consistently implement innovations and improve their offerings (for example, through automation and online booking platforms) to maintain competitive advantages.

Hotels are increasingly adopting eco-friendly practices, such as energy-efficient systems and waste reduction, to comply with global sustainability trends.



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