

# Order summary

We summarize the key themes and conclusions for the F&B market in 2018



1.

## Challenging market

- Increased competition and subdued consumer spending have contributed to declining or flat same-store sales
- Rising costs are pushing operators to optimize their operations



2.

## Quick service restaurants (QSR) work

- Driven by market conditions, QSRs have outperformed other formats
- Casual and premium formats have suffered a decline in both footfall and average spends



3.

## Setting the house in order

- Operators are working on improving operational efficiency, revisiting their business strategy and, in a number of instances, rationalizing their F&B portfolio



4.

## Delivery makes further inroads

- The UAE's 'deliverution' has been one of the few areas of growth for operators
- The introduction of delivery kitchens in the UAE could further improve the delivery economics



5.

## Expo 2020

- Operators anticipate that the mega event will provide a boost to the UAE's F&B sector
- The bulk of operators have formulated plans around the event, with an intention to either participate directly and/or target visitors through campaigns