

COULD HOTEL F&B SET A WORLD FIRST BY DOMINATING THE MID SECTOR DINING MARKET IN THE KINGDOM?

📍 Luxury, F&B, and Experiential Hospitality

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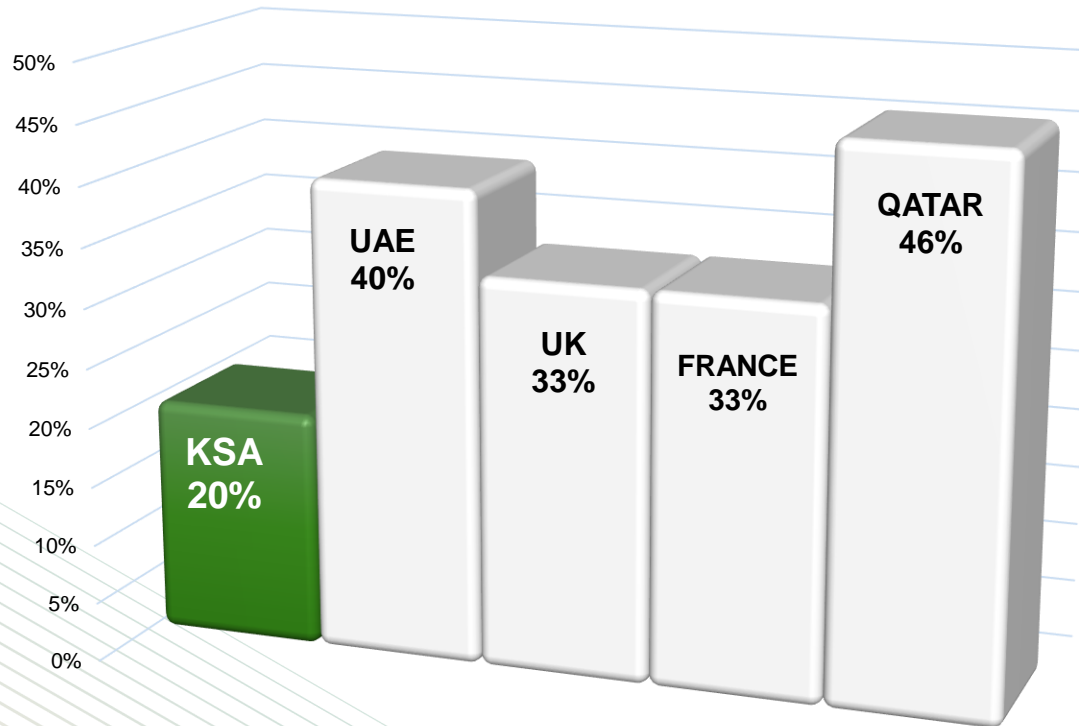
KSA RESTAURANT MARKET

THE RIDDLE OF RIYADH'S MISSING MIDDLE

FULL SERVICE RESTAURANT SECTOR - GCC VS EUROPE

COUNTRY COMPARISONS

% full service
restaurants
vs. total F&B
venues
(value)



KSA full service restaurants:

- Two thirds of UK & France
- half of UAE & Qatar

THE MID-SECTOR GAP

KSA vs UAE

Comparing KSA mid sector* with UAE (market value)

* average check of \$25-50 per person

KSA (\$30bn)	QSR & CAFE SECTORS		MID SECTOR	FINE DINE
UAE (\$23bn)	QSR & CAFE SECTORS	MID SECTOR		FINE DINE

Source; various

QSR = Quick Service Restaurants

**Mid market sector in UAE has
2x market share vs KSA**

WHAT IF WE STEAL MARKET SHARE FROM QSR's?

for every 1%
= \$238 million

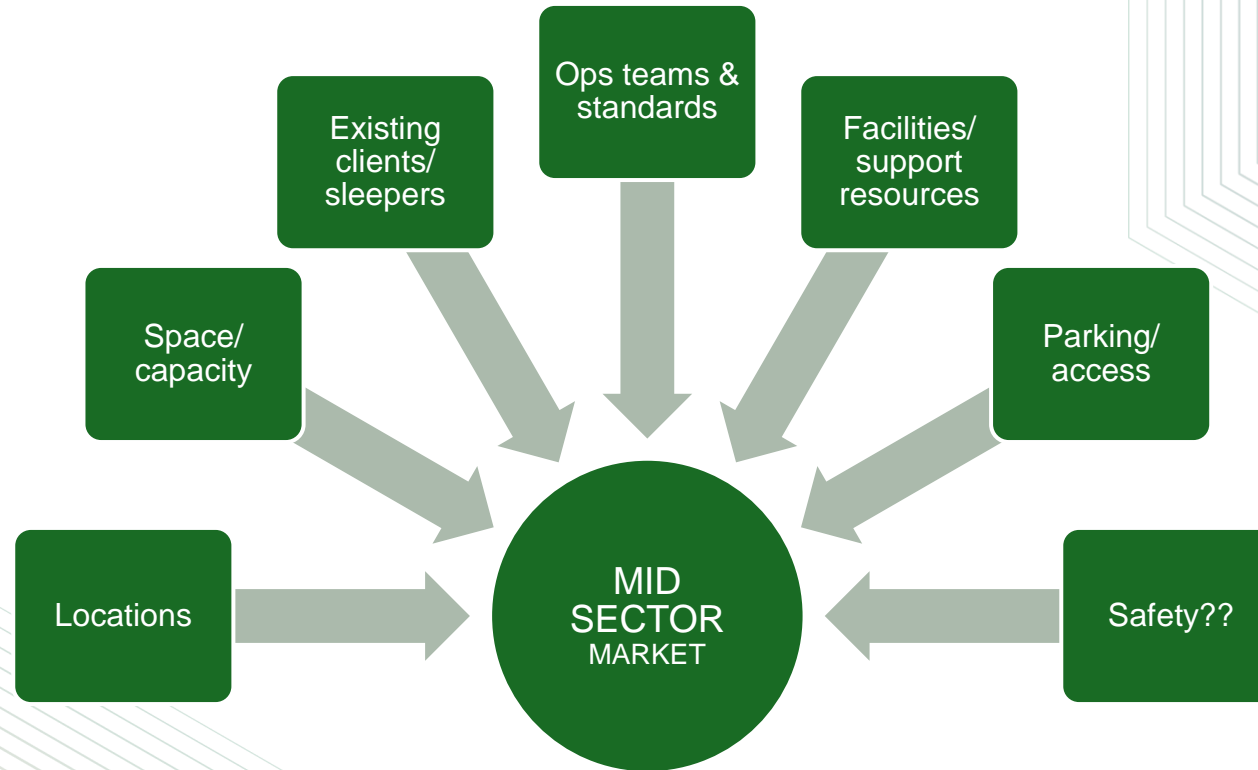


Growing KSA
mid-sector market

KSA (\$30bn)	QSR & CAFE SECTOR	MID SECTOR	FINE DINE
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**HOTELS ARE IDEALLY
PLACED.....**

*HOTELS - IDEALLY PLACED TO CAPTURE MID SECTOR F&B



* 3-4 star hotels?

STEP INTO THE MID-MARKET SPACE!

Hotels can reassert their relevance in F&B

Built-in advantages;

- (Effectively) no rent
- On-site parking
- Captive audiences
- Better working conditions and opportunities



We have seen the demand,
the space is open and hotels are
in a prime position to fill it.