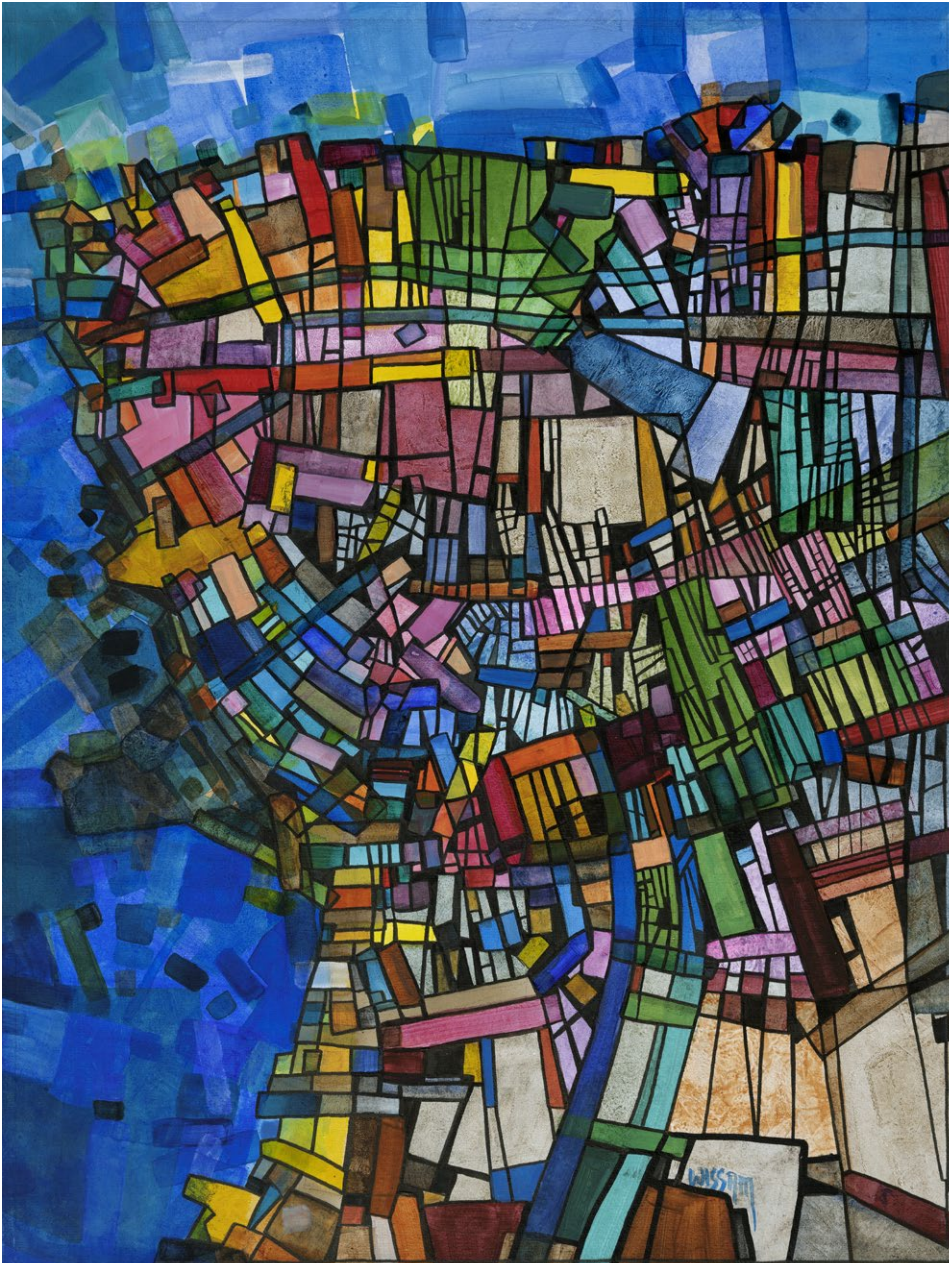


HODEMA MARKET INSIGHT

Beirut F&B report 2024

Beirut *Reinvigorated with life*



Wissam Beydoun, *Shattered Beirut*, August 2020. 54×40.5cm, mixed media on paper, private collection

Lebanon's instability unfortunately hasn't subsided in the last year. A few months after the release of Hodema's 2023 Food and Beverage (F&B) report, a new conflict broke out in neighboring Palestine, which has expanded to the Lebanese borders and as far as Southern Beirut. This has naturally impacted the country's already flailing economy and in turn the F&B sector has also been affected. Considering the uncertainty of the future, the numbers of expats and tourists coming to Lebanon has dropped meaning hotel occupancy rates are not as high as the previous year.

Since 2010 Hodema has been surveying, analyzing and studying 11 F&B zones that we shortlisted in Beirut. The survey and analysis were published in *Le Commerce du Levant* until 2019, inclusive. To determine the Food & Beverage zones of the capital, during the month of April 2024 we visited the 810 establishments present in these 11 zones - restaurants, cafes, bars, nightclubs, kiosks, and snacks. We noted since 2010 the number of establishments open per street, the number of seats, the positioning, the concept, the average ticket and the type of food offered. The statistics and developments presented and analyzed in this file come from all of these parameters.

The eleven zones we have chosen are zones with a high concentration of F&B establishments or high progression. They do not include certain parts of Beirut such as Raouche, Ain El Mreisseh or Tabaris, nor any outlets outside of the chosen zones.



Moreover, we did not take into consideration any unannounced projects nor new outlets opening after April 2024.

Even with the seemingly constant instability of Lebanon, the F&B

sector has seen a growth of 15.3% compared to last year. Across the zones surveyed a total of 86 outlets have closed since 2023, but there have been 169 new openings as of the time Hodema surveyed the zones in April 2024. The total number of F&B outlets in Beirut is now 810, which represents almost 83% of 2019's supply, signalling a gradual comeback to the numbers we had before the economic collapse and the Beirut Port explosion which decimated much of the capital's center.

Even with the seemingly constant instability of Lebanon, the F&B sector has seen a growth of 15.3% compared to last year.

It is also worth noting, that generally in Beirut, even in zones which Hodema have not surveyed such as Ain El Mreisseh and different parts of Achrafieh, there is a great surge in F&B concepts with a lot of new brands coming to life. Many brands that operate F&B outlets outside of Beirut have also chosen the capital as a home to open an additional branch, such as Amaleen coming from the Beqaa area, and Zad el Baher coming from Saida – both of which are not serving alcohol within their offering - and Furn Merchak and Merchak Café coming from Batroun.

Within the parameters of Hodema's 2024 survey, nearly all the zones have seen growth in the F&B sector, besides Hamra

which has seen an almost 7% decrease in its F&B outlets compared to last year. On the opposite end of the scale, we have Park Avenue experiencing the biggest growth even with its small neighborhood size: an increase of almost 44% in its F&B market, with many of the brands being on the higher end and targeting the wealthy.

We also see a big increase in Downtown's F&B supply by 34.5%, which is thanks to the Saifi Village area boasting many new concepts. Hodema predicts the growth to only increase throughout the year since Beirut Souks are expected to welcome many new brands. Notably, Monnot-Sodeco, Bliss, Zaitunay Bay and Verdun have all experienced a growth between almost 12 to 13% in their respective F&B markets.

While Badaro has only seen a 4.7% increase in supply since last year, it has now reached its 2019 numbers again. Additionally, while the Sassine zone in Achrafieh has showed stagnation this year by experiencing a minimal increase of 1.1% it remains an important zone in Beirut.

Finally, we have what we call the two heroes, who were hit hard during the Port explosion and destroyed to the extent where what we see today almost feels surreal. Those two are: Mar Mikhael which has seen a growth of 18.3%, and Gemmayze with a growth of 24%. They are also the two zones with the biggest supply today.

President of the Syndicate of Owners of Restaurants, Cafés, Night-Clubs & Pastries in Lebanon, Tony el Ramy expressed to Hodema, "Where there are restaurants, there is life." "We all remember the August 4, 2020 port explosion and how it affected all areas around it, Beirut was in ruins. Today we look at those areas, and we see them pumping life, with all sorts of F&B outlets. We currently have more than 13 nightclubs within the Waterfront area, we are seeing life, movement, and existence back in Beirut thanks to the hospitality sector."

He did signal caution though: "We, in the Syndicate of Owners of Restaurants, Cafés, Night-Clubs & Pastries in Lebanon are happy that the sector is still one of the most functional and beautiful in the country, and we

spoke on many occasions about how it has put Lebanon back on the international map last year, and has done very well despite all the constant hardships. However, we did release a statement recently saying that competition is important, and every investor has the right to invest but F&B openings need to slow down, because this is a profession and a business, not a hobby, hence why before investing one should take into consideration the steps and professionalism needed to operate a successful outlet within the sector, instead of operating random concepts."

In relation to staffing in the F&B market across Beirut, although salaries have shifted to be paid in dollars, the packages haven't been as attractive or as high as they used to be and social security benefits have crumbled to nothing. Lately, even the service at the majority of F&B establishments has reportedly downgraded even in places that are positioned in the high-end segment where you would expect fine attention.

Even though this is the case, Director of the Institute of Business Administration

at the Saint Joseph University, Professor Celine Boutros Saab interestingly told Hodema the enrolment in the IGE-Hospitality Management BA program has experienced a significant 25% increase compared to previous academic years. "This rise underscores growing interest and recognition of the program's value in preparing students for diverse careers in the hospitality industry," Professor Saab said.

She also added that a significant number of fresh hospitality graduates in Lebanon are choosing to seek work abroad, drawn by opportunities for career advancement, international exposure, and competitive salaries. "However, a notable portion remains in Lebanon, contributing to the local hospitality sector despite economic challenges," Saab concluded.

During Hodema's 2024 study, we have noted that international brands are increasingly setting up shop in Lebanon, such

We have Park Avenue experiencing the biggest growth even with its small neighborhood size: an increase of almost 44% in its F&B market

as the welcomed return of Pinkberry, and brands coming to Lebanon for the first time such as Joe and the Juice and Oakberry. Lebanese gastronomy also seems to be in trend this year, with a big surge in Lebanese cuisine concepts within the surveyed zones as well as within the country generally, in the form of restaurants and other business models such as delis and snacks. Hodema also took note that the Lebanese food culture is currently being modernized by a new generation of chefs and operators, making the "Lebanese cuisine with a twist" a hot trend within the sector today.

Another trend to emerge in the last year is the offering of large and diverse menus, focusing on or merging different cuisines in order to cater for the tastebuds of different clientele in one destination. The F&B

market in Beirut has also seen healthy concepts emerging, with a focus on gluten, dairy, and sugar free options, as

well as farm to table menus and vegan/vegetarian options, to be able to keep up with today's customer health awareness and the lifestyle that supports it.

The past year has seen festive restaurants and bars with live performances becoming more and more present, particularly being organised by the big operators. The ever-present trend in Lebanon of the café bars which start their day with an americano and end it with a gin tonic, read: coffee destination by day, and a bar hopping experience by night, continues to be readily available in the vibrant zones of Beirut.

On August 17, 2011, the smoking ban, also called Law 174, was passed by the Lebanese Parliament. It dictates that "smoking, lighting a tobacco product or using such a product is prohibited in all enclosed public places, workplaces and means of public transportation." This encompasses restaurants, coffee shops, bars, nightclubs, and any other tourism or entertainment place. After months of tensions between F&B owners and the Lebanese authorities, the law took effect one year later and the ban was implemented all over the country, on September 3, 2012.

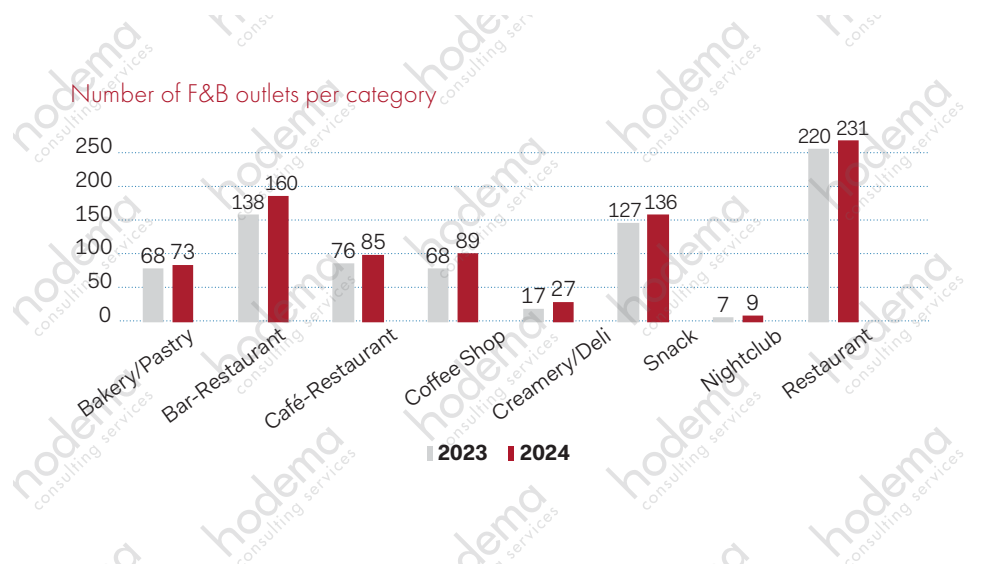


© Maryool

While this law has been in place for over a decade, in the recent years we have seen many F&B outlets allow smoking indoors and not taking into consideration the tobacco control law. There have been no repercussions or law enforcement meaning dining can be unpleasant for the non-smokers. The fault lies in a trifecta of the government, the operators, and the Lebanese customers, but considering the lack of law enforcement across the country and an absence of funding and resources for agencies following the economic collapse, it seems unlikely this will be addressed with speed.

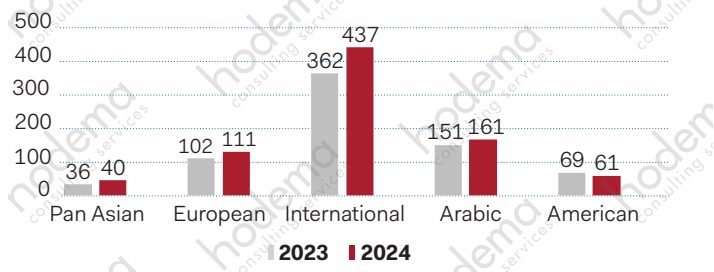
Overall, for a country that does not know peace, the F&B sector in the surveyed areas is doing quite well. If what is promised eventuates, a lot of international brands will soon be seen to support the local market. Five-star hotels are also coming back accompanied with restaurants, such as Four Seasons hotel which has four restaurants including one Peruvian and a French brasserie and the new hotel, Voco, coming to life soon in the area with 3 F&B outlets. A lot of clusters are also coming and spaces that hold multiple F&B concepts in a common area, such as several vacant lands in Downtown or waterfront area that are being rented and transformed into hubs of nightlife venues or F&B establishments which will be sure to boost numbers. Looking into the next year, it is possible we will reach the 2019 pre-economic collapse numbers, but we ask does that mean we are heading towards a saturation of the market?

El Ramy concluded: "As for 2025, thanks to how we have seen the sector handle the multiple crises the country has gone through, and the way it has emerged back stronger and better, the syndicate is optimistic about the future always, but we cannot forget the situation we are in today in terms of lack of security nationwide, and what could the future of it be, but we hope that just like the sector has survived and revived previously, it will keep on doing so."

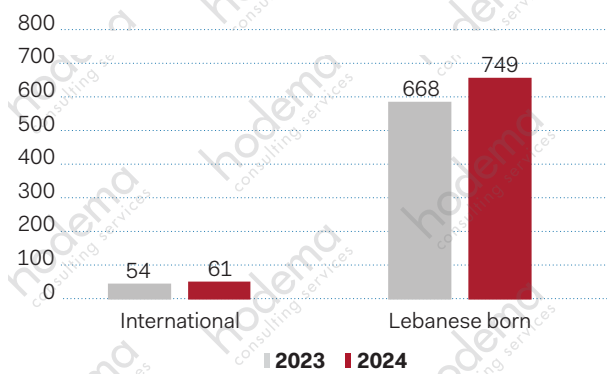


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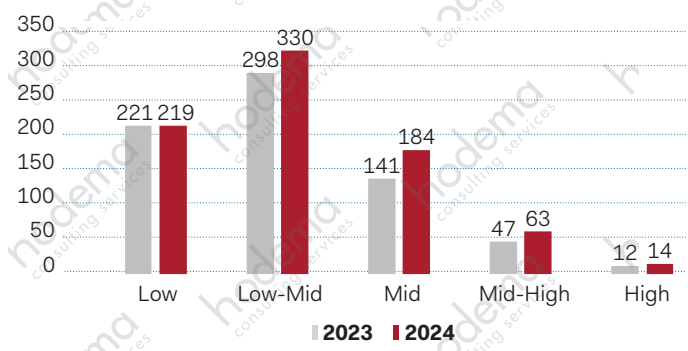
Number of F&B outlets per type of cuisine



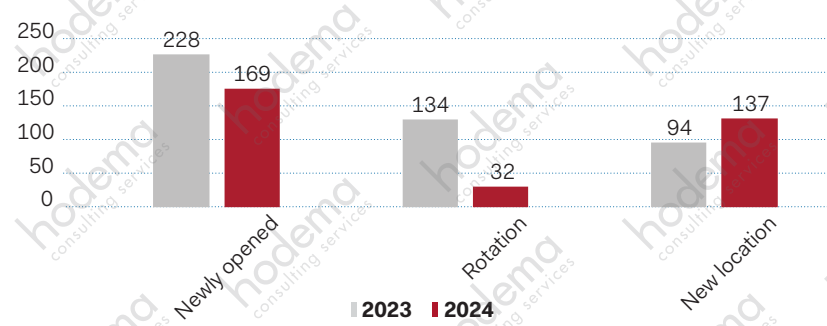
Number of F&B outlets per concept origin



Number of F&B outlets per positioning



Newly opened outlets 2023 vs. 2024



F&B outlets

722^{IN} 2023

810^{IN} 2024

Badaro *Safe and steady*

The laid-back atmosphere of Badaro, nestled in a residential area with wide-open streets flanked by trees, remains a welcoming area offering a diverse range of coffee shops, restaurants, café-bars and bars.

Badaro is equally a day destination as it is night, with a large selection of coffee shops open throughout the day and restaurant bars welcoming people for happy hour and late-night drinks. The neighborhood hosts an interesting mix of people considering its proximity to tourist attractions, hotels and embassies coupled with the mix of residential and office buildings in the area.

Badaro is boasting a 4.7% increase in terms of supply compared to last year with Hodema counting 90 establishments this year, compared to 86 in 2023. The overall number of outlets this past year has reached the 2019 number again, marking a turning point considering COVID-19, inflation, the economic crisis and the port explosion experienced since. Even so, the speed of growth this year compared to the last has been cut in half, due to the relative condensed area of the neighborhood which is already packed with outlets. Investors seem to be choosing other areas with a higher average check in order to open up new venues, considering the market in Badaro is already saturated with offerings, the average spend from consumers is low, and the neighbourhood is on the more relaxed side.

Still, since last year, 15 new F&B outlets have opened in Badaro, including the notable Bouquet Délicieux, a flower shop and café bunched into one, positioned at the beginning of the main street with a capacity of 14 seats. Street food and kiosks appear to be in trend this last year with three new small openings in Badaro, one of which is Saj Nation specialising in Lebanese Saj Manouche, and another is Kanaf, offering an assortment of the famous Knefe based on regional culinary variations. We also note Kokoro, a new Asian cuisine

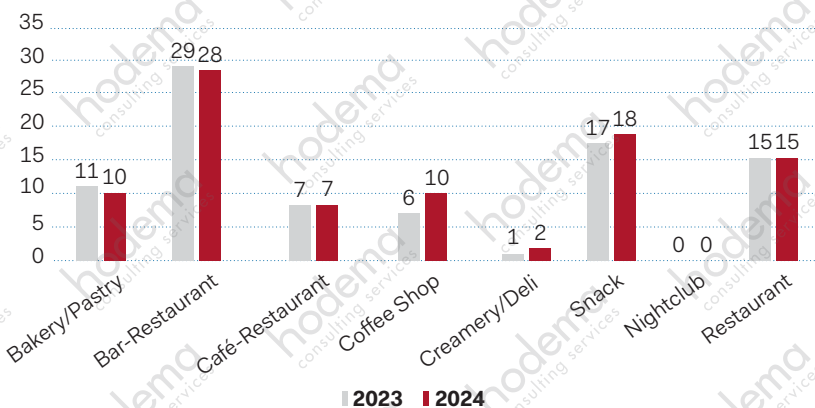
restaurant with a seating capacity of 50 as well as an upcoming bakery called L'Oven opening in place of what used to be Sputnik, serving both the Lebanese Manoushe and different types of wraps.

Considering Badaro is witnessing an increase in street food and smaller outlets, the zone has become even more affordable and practical for clientele. Badaro is a laidback, casual neighborhood reflected through its F&B outlets such as Katastrof, Néo Beirut – which will soon open its second branch in the Beirut Digital District, and one of Badaro's landmarks Kissproof, which is still doing well after years of operation. Badaro's landmarks continue to stand strong such as Mum & I which has been open since 2012, the Smallville Hotel which boasts five F&B outlets, and Onno Bistro, which has been serving Armenian and Lebanese flavors in the area for over a decade now.

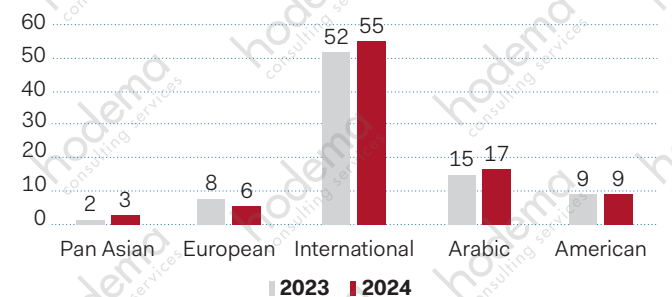
A total of 11 F&B outlets closed in Badaro since April 2023, including the bar restaurant Orient Express which had been open in the neighborhood for a decade. The restaurant bar Molo has moved to what was once known as Ortega with a seating capacity of 110 with an outdoor patio, while the pizza restaurant Don Baker has relocated out of Badaro. Four of the outlets which closed were replaced by new concepts. For example, the restaurant bar Wild Olive closed, but Katastrof opened in its place with a capacity of 110. And, what was once Bn Coffee Bar, is now Acme, a coffee shop with 20 seats. Out of the closed outlets that are still vacant, we note Pazzi, which used to be an Italian restaurant.

The area has almost kept the same total seating capacity in its F&B market since 2023, with only around 100 seats added in the last year. The most dominant positioning is low-mid end, with an average check varying between 15 to 30 USD.

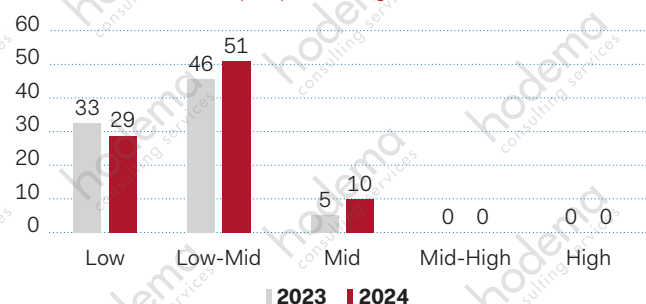
Number of F&B outlets per category



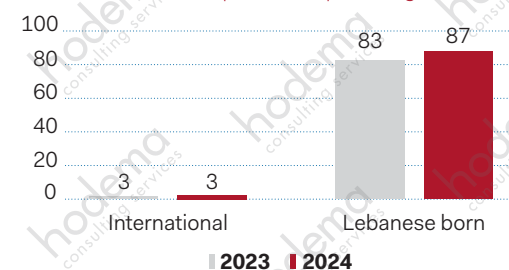
Number of F&B outlets per type of cuisine



Number of F&B outlets per positioning



Number of F&B outlets per concept of origin



1. The Smallville Hotel
Da Sophia
Meet Me Bar
Merry Go Round
Pink Sky Rooftop
Red Street Room
The Pool House
2. Molo
3. Néo Beirut
4. La Degusteria
5. Bouquet Délicieux
6. Gwen's Pub & Eatery
7. Kanaf
8. Lourdes Bakery
9. Kudeta Bistro
10. Bodo Badaro
11. The Witty Bun
12. Madhattan
13. Le Bon Point
14. ChicksALot
15. Acme Coffee
16. Onno Bistro
17. Crew Hut
18. The Old Fashioned
19. Dada
20. Marché Bio
21. Moka
22. The Protein Bar
23. La Burgeria
24. Katastrof
25. 27 Café Pub
26. Saj Nation
27. Kokoro
28. Obi Sushi
29. Sofretna
30. Happy Willow
31. Lina's - Paris
32. Di Farina



33. Boteco
34. Patisserie Éclair
35. The Attic Bar
36. Concierge Coffee
37. Açai
38. Curl
39. El Paseo
40. The Cavern Pub
41. Super Vega
42. Kissproof
43. Sift

44. Newbury
45. L'Oven
46. Café de Penelope
47. Pizzalata
48. Lennox
49. Roy's Public House
50. Café Younes
51. The Jerry Thomas Experience
52. Chez Fadi
53. Meshoir

54. Poke District
55. Vagabond
56. Community Badaro
57. East Village
58. Boneless
59. Moon Eye Café
60. Café Badaro
61. Brève
62. La Pinede
63. Al Baba Sweets
64. Sweet Industry

65. Maz
66. Sawani Falfoul
67. Coffee House
68. Kahwet Al Rasif
69. Snack Al Watan
70. Le Chef Inn
71. Chiban Snack
72. Al Moualem
73. Poule D'or
74. Al Zad Snack
75. Mint

76. Badaro Bakery
77. Pizza Enzo
78. Snack Al Mathaf
79. Mum & I
80. Le Marzipan
81. Brew'd
82. Café du Coin
83. McDonald's
84. Pizza Hut
85. Bachir Ice Cream

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Bliss *Building momentum*

Bliss is a vibrant area situated around the American University of Beirut (AUB) in which F&B outlets are primarily frequented by students and employees of the university. Some F&B landmarks have long been present such as the well-named snack Bliss House, which has been open since 1978, and the famous crepe kiosk Tonino operating since 1999. Socrate restaurant has also been operating since 2009, the Lebanese born concept Zaatar W Zeit, and Snack Faysal operating since 1984 which specializes in Lebanese savory pastry and baked goods. Bliss as a zone can be described as an open-air food court historically offering street food.

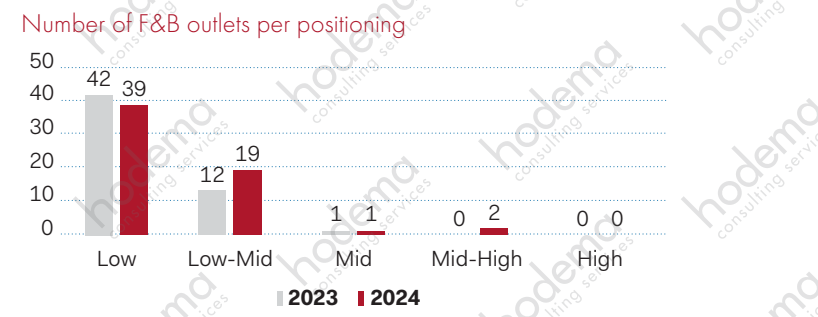
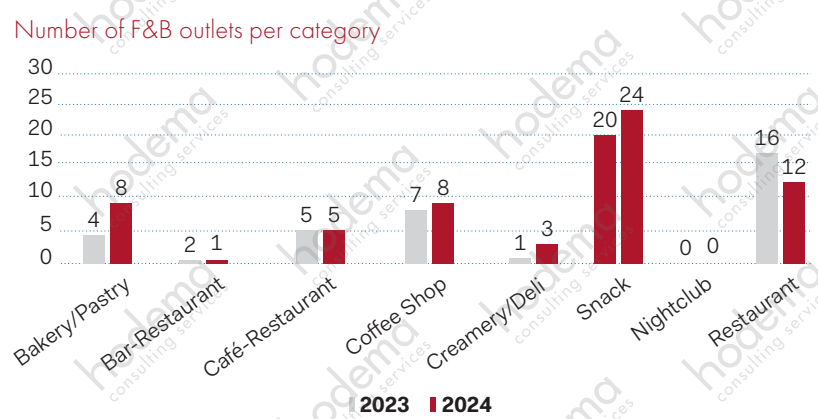
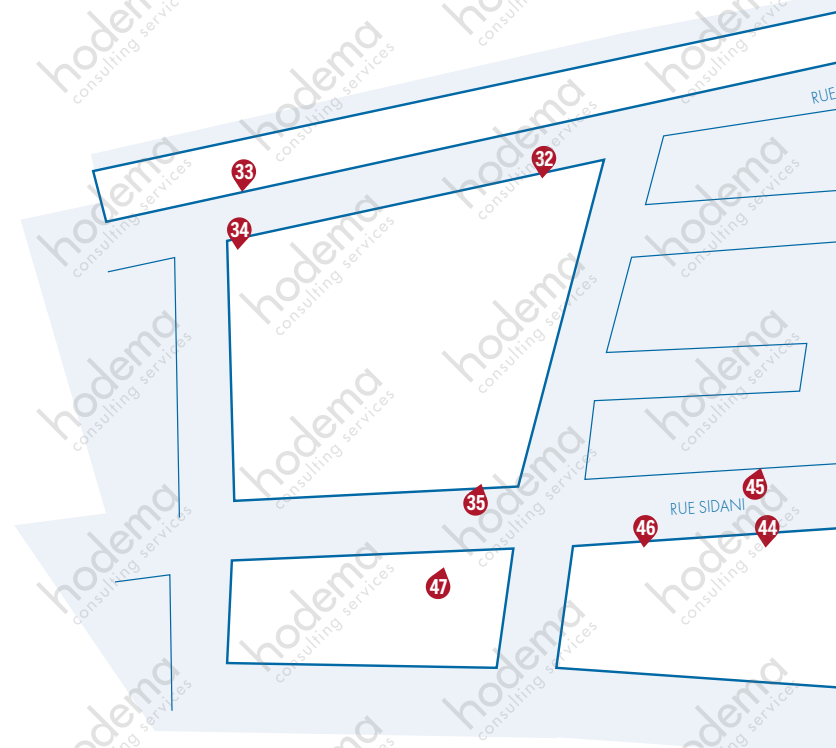
The area is picking up again as it sits 13% higher in terms of supply, now home to 61 F&B outlets compared to last year's recorded 54. Still these numbers are behind the 78 offered establishments in 2019 before the country's economic crisis and the Beirut Port Explosion, even though AUB has seen an increase of 20% in teachers and students on campus since last year. The university now hosts 7,500 students and 2,618 professors, a welcome comeback – slowly reaching the pre-crisis numbers of 9,000 students and 3,000 professors - meaning there are more customers frequenting the Bliss Street F&B outlets.

Since Hodema's last report in 2023, Bliss has welcomed 14 new outlets including Oakberry, an international brand originally from the US specialising in takeaway Acai bowls; operating out of the ground floor of the famous 1866 Court & Suites Hotel, the venue has no seating.

Most new outlets within this zone focus on international or Arabic cuisine, with the majority selling snacks and bakery items, mirroring the offerings in Bliss. Further to add, outlets with a low-mid end positioning have increased significantly since last year, going from 12 to 19 outlets; these outlets are often owned by independent operators or operators wanting to test new brands.

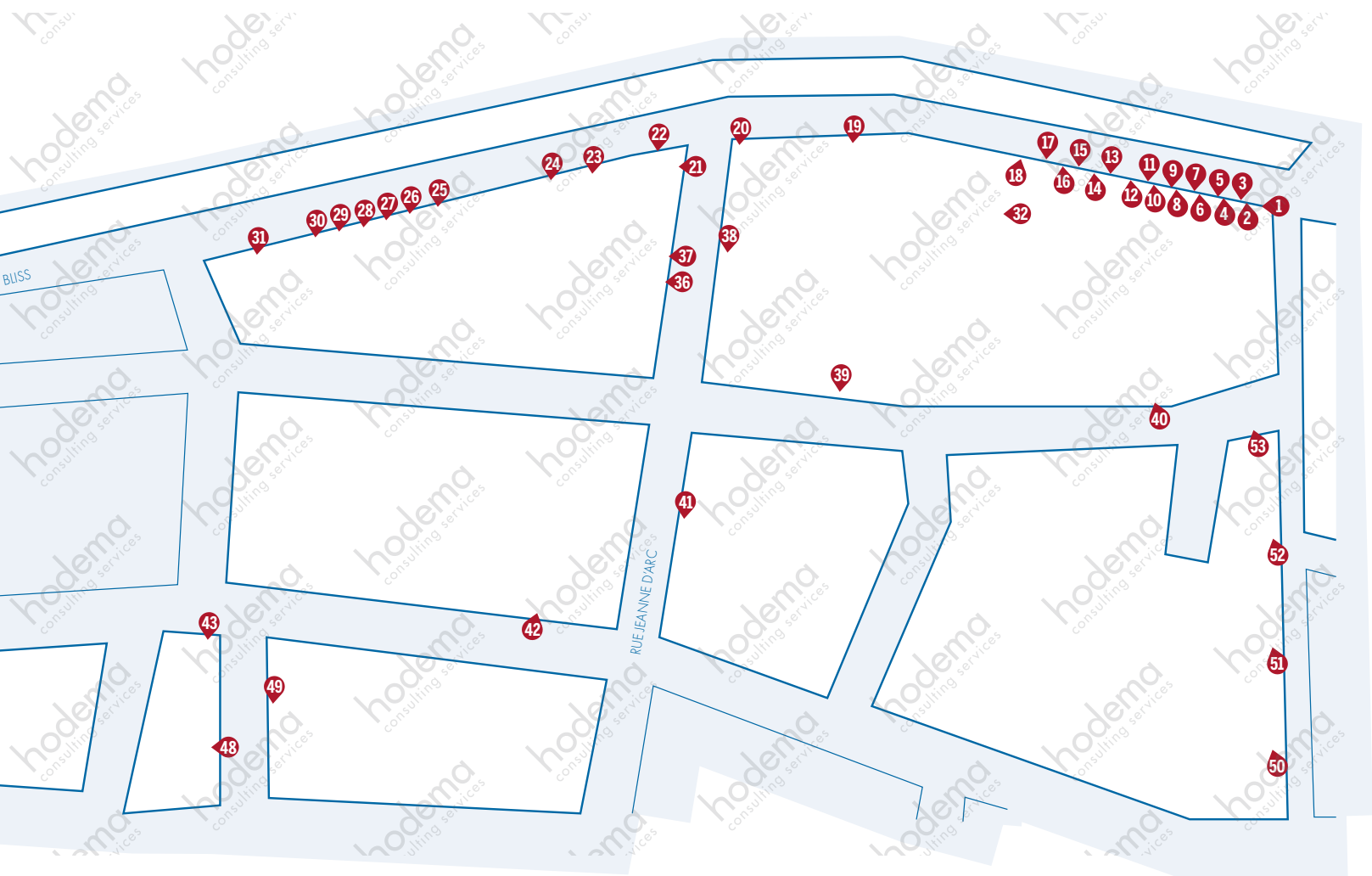
Another American-born brand, Cold Stone has opened on Bliss Street in the last year, serving different flavoured ice-cream. The homegrown Lebanese brand of Al Abdallah which has been expanding around the country has joined the convenient offerings for passers-by on Bliss, with a seating capacity of 25. It is worthy to mention all of the concepts which opened in 2023 are still up and running.

Since April last year, 10 F&B outlets have closed in Bliss, including the landmark Casper & Gambini's, though out of those which have closed, almost half have been replaced with new concepts.

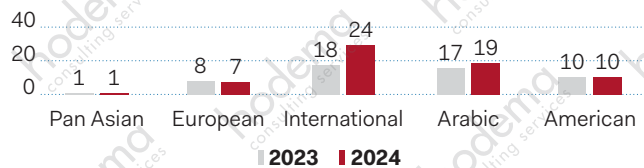


Newly open F&B outlets in 2024

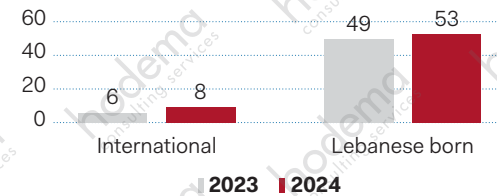
10% NEW LOCATIONS **4** ROTATIONS



Number of F&B outlets per type of cuisine



Number of F&B outlets per concept origin



- | | | | | |
|--------------------------|----------------------|------------------------|---------------------------|-------------------------|
| 1. Zaatw w Zeit | 11. Bliss House | 24. Sub & Wrap | 37. Laffe | 46. Shawarma w Noss |
| 2. Charlie's Hotdog | Ice Cream | 25. KFC | 38. The Food District | 47. Socrate |
| 3. 1866 Tower and Suites | Sandwiches | 26. Al Abdalla | City Wak | 48. Abou Karam Falafel |
| Bartartine | 12. Latte Art | 27. Conut | Fiori | 49. Mouajannat El Hamra |
| Paul | 13. Comsi Comsaj | 28. La Botana | Soul Food | 50. Furn Abdel Aziz |
| Roadster Diner | 14. Mont Croissant | 29. Dip n Dip | Sweet Greens | 51. Snoubar |
| Oakberry | 15. Boneless 28 | 30. Dominos | Taco Diablos | 52. La Molina |
| 4. Drop | 16. University Crêpy | 31. Cheese on Top | 39. L'Autre | 53. Super Croissant |
| 5. Bakerloo | 17. Stories Coffee | 32. A-305 | 40. Kafkir Barometre | |
| 6. Cold Stone | 18. McDonald's | 33. Snack Faysal | 41. Tahet El Shajra | |
| 7. Tonino | 19. Dunkin' | 34. Taj Al Moulouk | 42. Mouajannat Jeanne | |
| 8. Chatime | 20. Le Sam | 35. Al Hamra Snack | D'Arc | |
| 9. Malak Al Tawouk | 21. Forn Makdisi | 36. Mikey's Sandwiches | 43. Falafel Karim Sahyoun | |
| 10. Front Door Coffee | 22. Universal Snack | & Co | 44. Furn Beit Manouche | |
| Station | 23. KB Döner | | 45. Sandwich Abou Afif | |

Downtown *Showing signs of life*

What was designed to be the heart of Beirut, rebuilt after the Civil War, Downtown has reflected all the difficulties of the country. Downtown took the brunt of the 2019 protests centered in Martyrs Square when many businesses were attacked and looted, then, what remained was destroyed in the 2020 Port Explosion.

Hodema found last year that Downtown's proximity to the explosion and the protests made owners steer away from reopening, though fast forward to 2024 and the zone seems to be waking up. There are 15 more F&B outlets this year compared to the total number of outlets recorded last year which sat at 29.

The zone of Downtown is showing signs of life, primarily due to the growth witnessed in Saifi Village. Notably, within Saifi, Buco which is short for Burger and Cocktails, has opened by Chef Tarek Alameddine serving high quality burgers and cocktails with a seating capacity of 150. Other new openings within the Village are Vicoli, an Italian restaurant, Villa Clara, a French restaurant and bar, Julienne, a restaurant offering both Mediterranean and Japanese cuisines, and Mayrool another of Karim Arakji's concepts, a contemporary Lebanese eatery.

The most important landmarks in Downtown such as Meat the Fish, The Backburner, Capitole by Analogue, and Clap all still going strong and doing well.

Amaleen, a brand focusing on Lebanese cuisine already operating in the Bekaa, has also chosen Downtown for its second outlet, with a seating capacity of 240.. The Beirut Souks are expected to continue to grow and welcome more F&B brands in the coming months. The

strip will also see openings by retail brands, further injecting life into this destination.

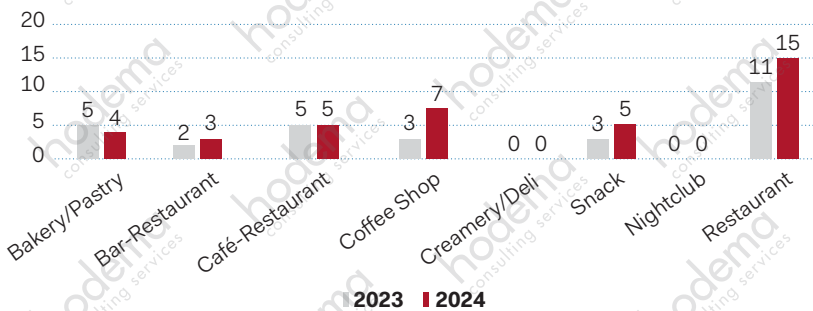
After years of Al Sultan Brahim's previous location in Downtown being vacant, Zad Al Baher, a brand coming all the way from the south has taken its place in the form of a Lebanese seafood restaurant with a seating capacity of 400.

Almost 50% of the new comers have a mid-end positioning, reflecting the area's most present positioning in the F&B market, though the area doesn't fall short when it comes to mid-high-end positioned outlets. International cuisine in Downtown has seen a growth of almost 35% since last year, and Arabic cuisine outlets have almost doubled. Of the new openings, 73% are restaurants and coffee shops.

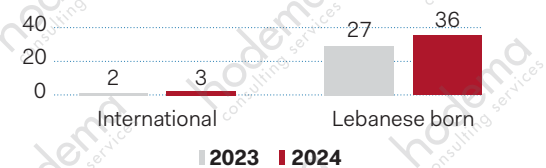
Downtown has seen only five F&B outlets close since April 2023, including Laymoon and Ummi. BRGR.CO and PZZA.CO have also closed their outlets in Downtown and moved to Avenue du Parc. To date, none of the closed outlets have been replaced with new brands. The landmark hotel Le Gray which was previously home to four outlets remains closed following the explosion in 2020.

New openings are expected in Downtown soon such as Lezard Noir, a fine-dining concept by Kampcatering, which is replacing Balthazar's old location. The area has also witnessed a 40% increase in seating capacity compared to 2023, going from a total of 1,933 to 3,250 seats, reflecting the almost 35% increase in the F&B supply within the zone.

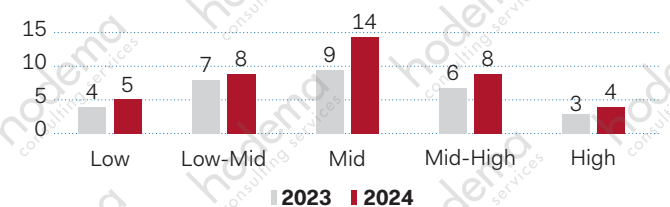
Number of F&B outlets per category



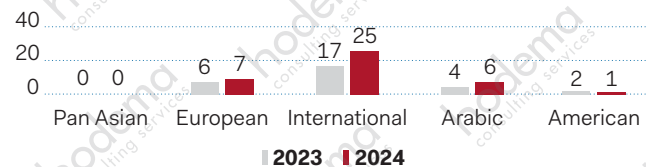
Number of F&B outlets per concept origin



Number of F&B outlets per positioning

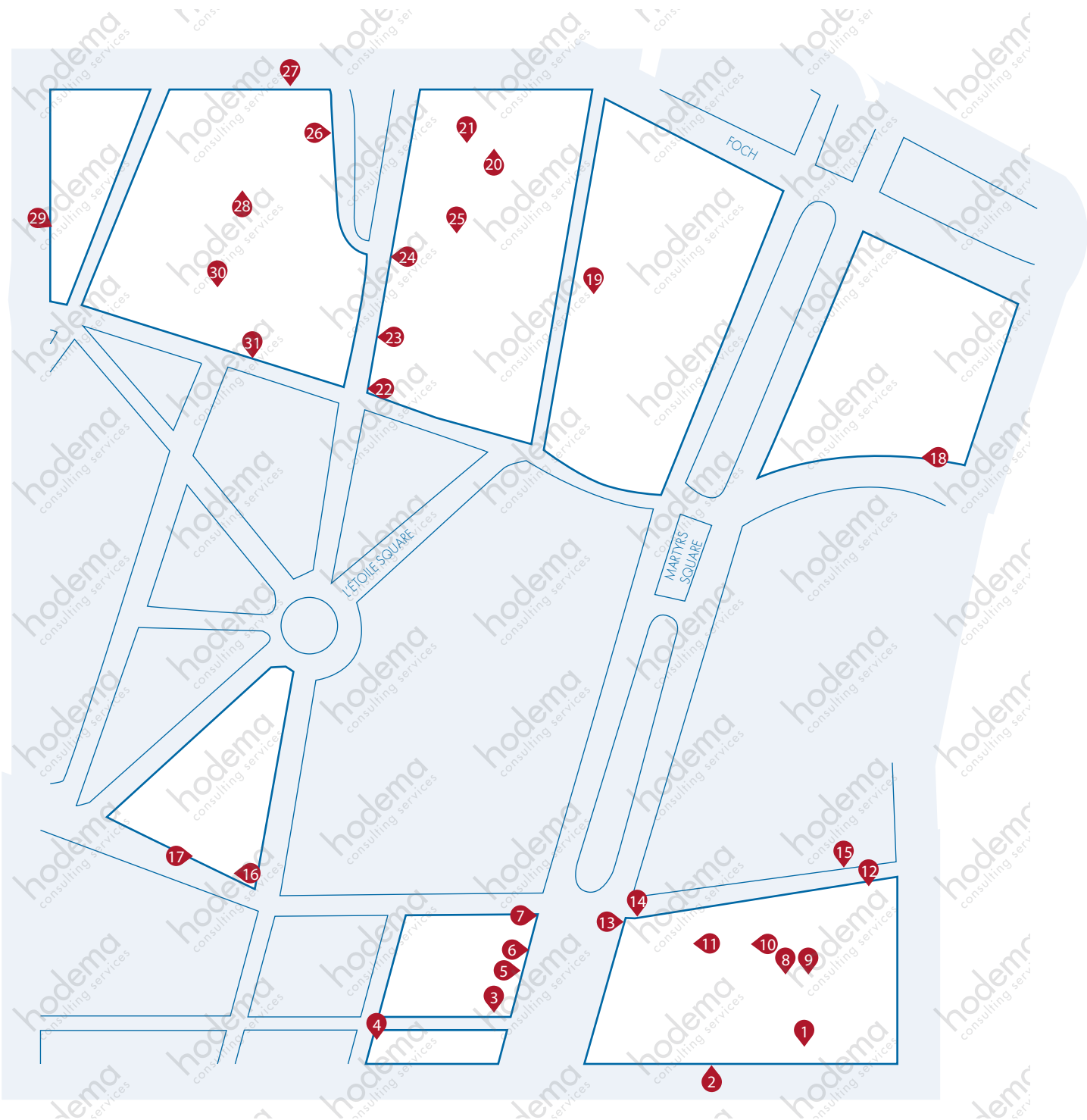


Number of F&B outlets per type of cuisine



F&B outlets since 2023

34.5% INCREASE



- | | | |
|---------------------------|--------------------------|----------------------|
| 1. Flat White | 13. Julienne | 26. Amaleen DT |
| 2. Riccello | 14. The Backburner | 27. Zad Al Baher |
| 3. Maatouk Maison du Café | 15. Pyrk | 28. Café Centreville |
| 4. Soha Snack and Grill | 16. Bohsali | 29. Skirt |
| 5. Villa Clara | 17. Capitole by Analogue | 30. Beirut Souks |
| 6. Vicoli | 18. Clap | Al Antabli |
| 7. Buco | 19. Casanova Café | Grid |
| 8. Maryool | 20. People | Snoubar |
| 9. Paname | 21. Paul | Spinneys Signature |
| 10. The Core | 22. Patchi | Starbucks |
| 11. Meat the Fish | 23. Kalm | Sister Wraps |
| 12. Burgundy | 24. Salata | Uncle Fluffy |
| | 25. Scrolle | Kababji |
| | | 31. Lezard Noir |

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Downtown's Park Avenue *Beirut's ritz and glitz*

Park Avenue is a destination which grew organically by surprise in a residential area in Downtown, located between the Four Seasons Hotel and Kantari Street inclusive. Today Park Avenue is a vibrant, flourishing area frequented by lavish clientele with high purchasing power.

As an F&B zone, Park Avenue has seen a growth rate in the past year never before seen in Lebanon. The neighborhood seemingly reflects the country's schizophrenia where even during the crisis everything is booming and growing. Park Avenue experienced a 44% increase in supply in 2024 compared to last year, with the total number of outlets reaching 44, up from 32 in 2023.

There are 14 new F&B outlets which have opened in Park Avenue since Hodema's last report in 2023, notably Em Sherif Deli - which has been in the works for some time now as an extension to the Em Sherif family - is finally open in the new Starco, serving casual Lebanese delicacies on the go, with a seating capacity of 30.

The famous Noura has also opened a concept under the name N Café in the renown Phoenicia Hotel, with a seating capacity of 120 and a focus on international cuisine. Merchak Beirut, a restaurant curated by Merchak Group, has also chosen its home in the Avenue area in the last year, serving Lebanese cuisine with a seating capacity of 180. Park Avenue is still host to primarily Arabic and international cuisines.

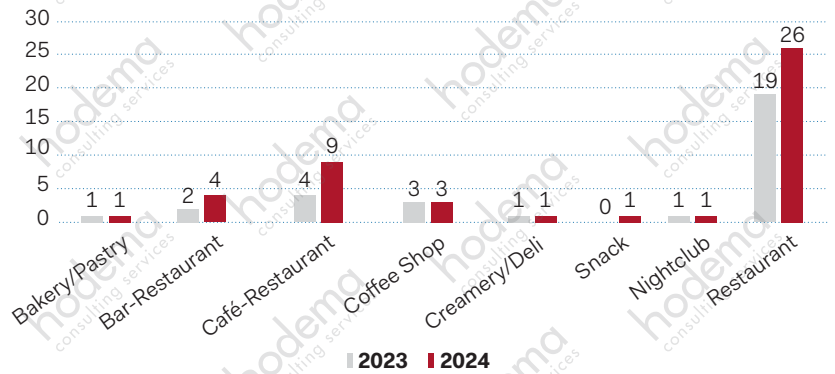
The Danish brand, Joe and the Juice which is set to open in ABC malls across Lebanon has also opened a branch in the zone of Park Avenue. Landmarks that have been operating for years within the area including Em Sherif Café, Kampai, and Métropole are still serving and strong.

Remarkably, only one outlet has closed in the area since last year: Kalila, which was a restaurant serving Lebanese cuisine and its location is to become home to a new restaurant called Machrou3 Beirut. The landmark Four Seasons Hotel which once contained five outlets alone remains closed post 2019 but is announced to re-open in 2026.

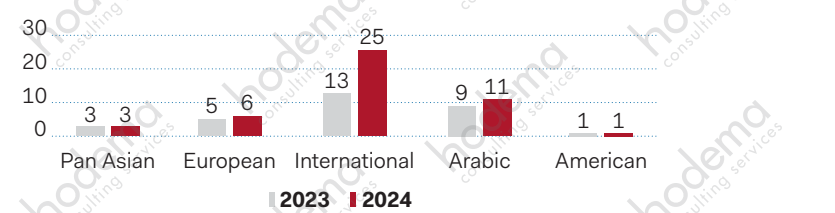
Last year's seating capacity within Park Avenue was 5,819, while this year it is 6,898, making it almost 19% higher thanks to the numerous new openings, such as Azmi, the Lebanese cuisine restaurant which has introduced 300 seats to the area.

The positioning of the zone remains within the mid-high ends, with an average check varying between 50 to 70 USD per person.

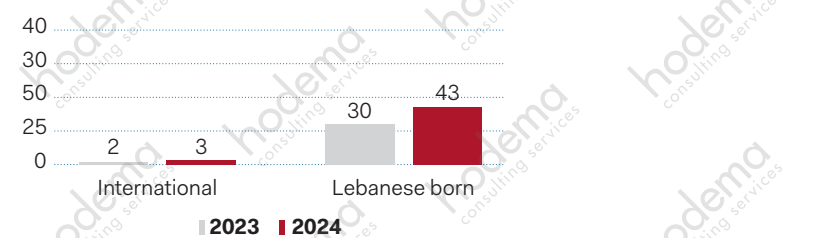
Number of F&B outlets per category



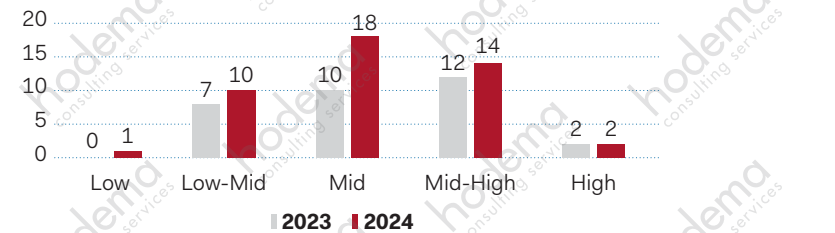
Number of F&B outlets per type of cuisine



Number of F&B outlets per concept origin

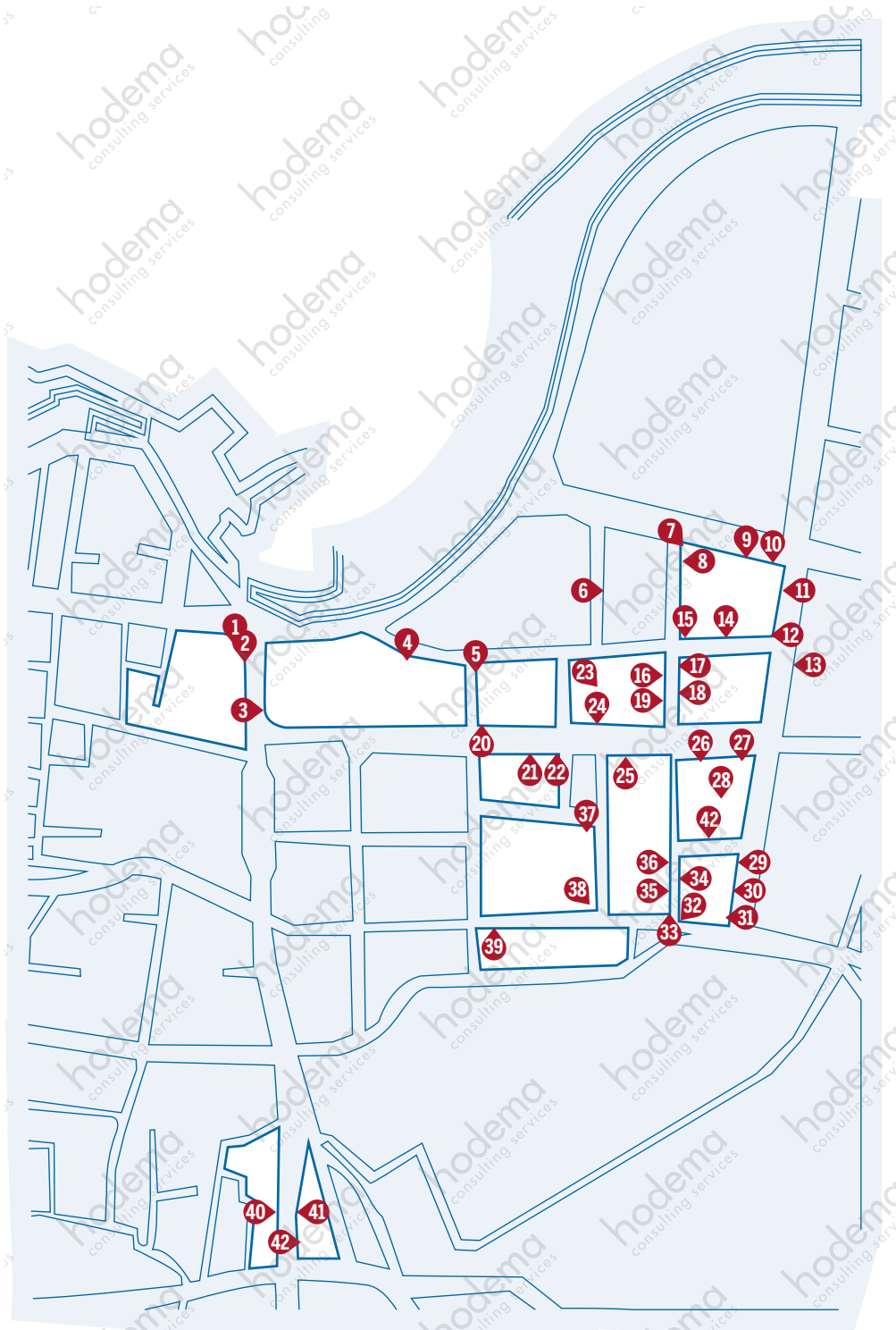


Number of F&B outlets per positioning



F&B outlets seating capacity

44% INCREASE



- | | | | |
|---|---------------------|-----------------------|-----------------------------|
| 1. Phoenicia Hotel
Mosaic
Amethyste
Cascades Lounges
N Café | 10. Azmi | 22. Em Sherif Deli | 34. Gavi
Kampai |
| 2. Mandoline The Club | 11. Cask & Barrel | 23. Patchi Café | 35. The Co's |
| 3. Beirut Way | 12. Em Sherif Café | 24. Starbucks Reserve | 36. Cold Stone |
| 4. Darling Society | 13. Le Petit Café | 25. Machrou3 Beirut | 37. Ramada Hotel
Scarlet |
| 5. Ai | 14. Café Monaco | 26. L'Avenue, Beirut | 38. Starco Music Hall |
| 6. The Cabinet Liquor & Cigar | 15. Métropole | 27. Plume | 39. Noura |
| 7. Léo La Terrasse | 16. BeBabel | 28. Atelier1339 | 40. Lakkis Farm |
| 8. Avanti | 17. Gala | 29. Cocteau | 41. Osaka |
| 9. Merchak Beirut | 18. Thanna b Beirut | 30. Maison Prunelle | 42. Blend |
| | 19. Kun | 31. Lily's Café | 43. Joe and the Juice |
| | 20. Amar Café | 32. Seray | |
| | 21. Le Sushi Bar | 33. Al Beirut | |

Gemmayze *Revived to its glory days*

Compared to last year, Gemmayze has increased by 24.1% in terms of supply, and the total number of outlets the zone boasts as of 2024 is 103, up from 83 last year making it second only to Mar Mikhael in terms of F&B supply. There are 33 newly opened F&B outlets since Hodema's last report in 2023, including: Un Peu Fou, an eatery and bar offering seasonal Lebanese cuisine with a twist with a seating capacity of 70; Levant, a coffee shop serving traditional Lebanese pastry and high quality coffee; and Furn Merchak, traveling all the way from Batroun and specialising in the Lebanese Manouche.

The Italian Fresca Dolce specialising in Gelato and the American Acai bowl chain Oakberry are two international brands which have opened their doors in Gemmayze, with 34 and 8 seats respectively. The zone has seen a big growth in international cuisine with almost 55% of new comers offering it. The fresh outlets have also boosted the seating capacity in the area by 25% and outlets with a mid-high end positioning are increasing, of which we note the new concepts Mii-Yao, an Asian bar by the same owners of the restaurant Terre, and Fred Kitchen & Bar, serving French/Italian dishes and international cocktails.

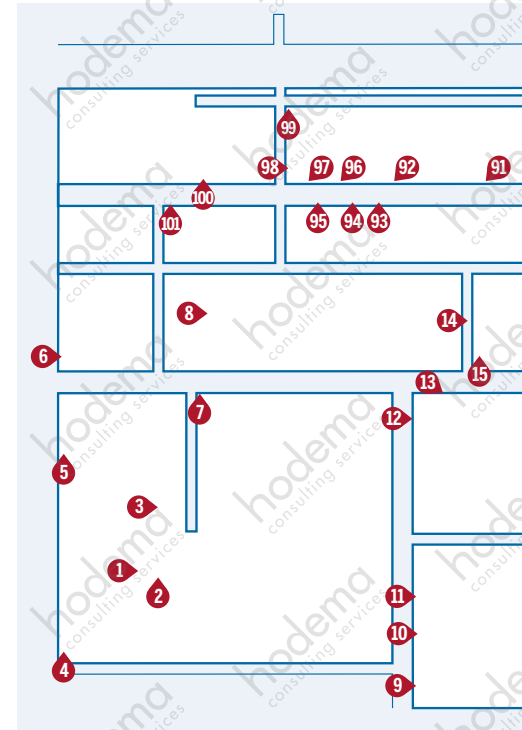
We give Pasteur street credit for uplifting the zone in the past year and playing a big role in its growth. The street is thriving with new comers and old establishments which have been present there for years, such as House of Butlers, the bar serving high quality alcohol, Cyrano, and Mayrig.

Landmarks that remain in the zone are Le Chef, the Arabic cuisine restaurant that has been operating since 1967, Mitsu-Ya the Omakase bar and Izakaya, the French brasserie Le Petit Gris, as well as Paul, the bakery and restaurant café at the opening of Gemmayze.

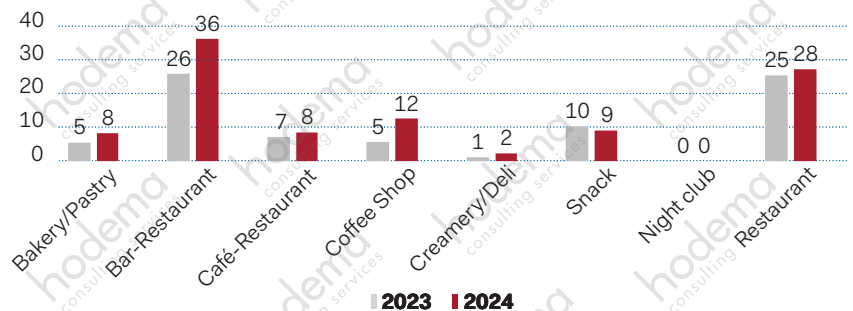
Nine F&B outlets have closed in Gemmayze in the last year including names that had been operating in the area for years, such as: Arteen, and La PizzAria. Though three out of the nine closed outlets have been replaced with new F&B concepts, the remaining are still vacant.

Gemmayze offers a broad diversity in its F&B outlets: you can find anything from coffee shops to bars to high-end restaurants, and a variety of cuisines such as French, Italian, Asian, Lebanese and Armenian.

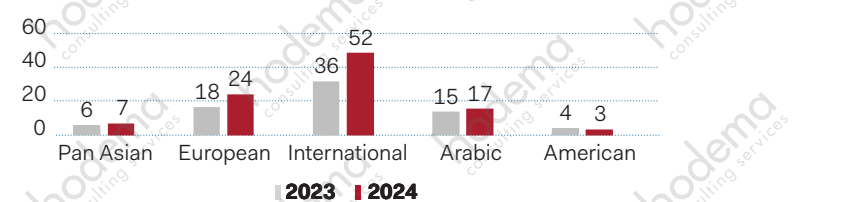
Multiple hotel and boutique hotel projects are taking shape in Gemmayze and are announced to start operating in the upcoming two years, making it an even more attractive area.



Number of F&B outlets per category

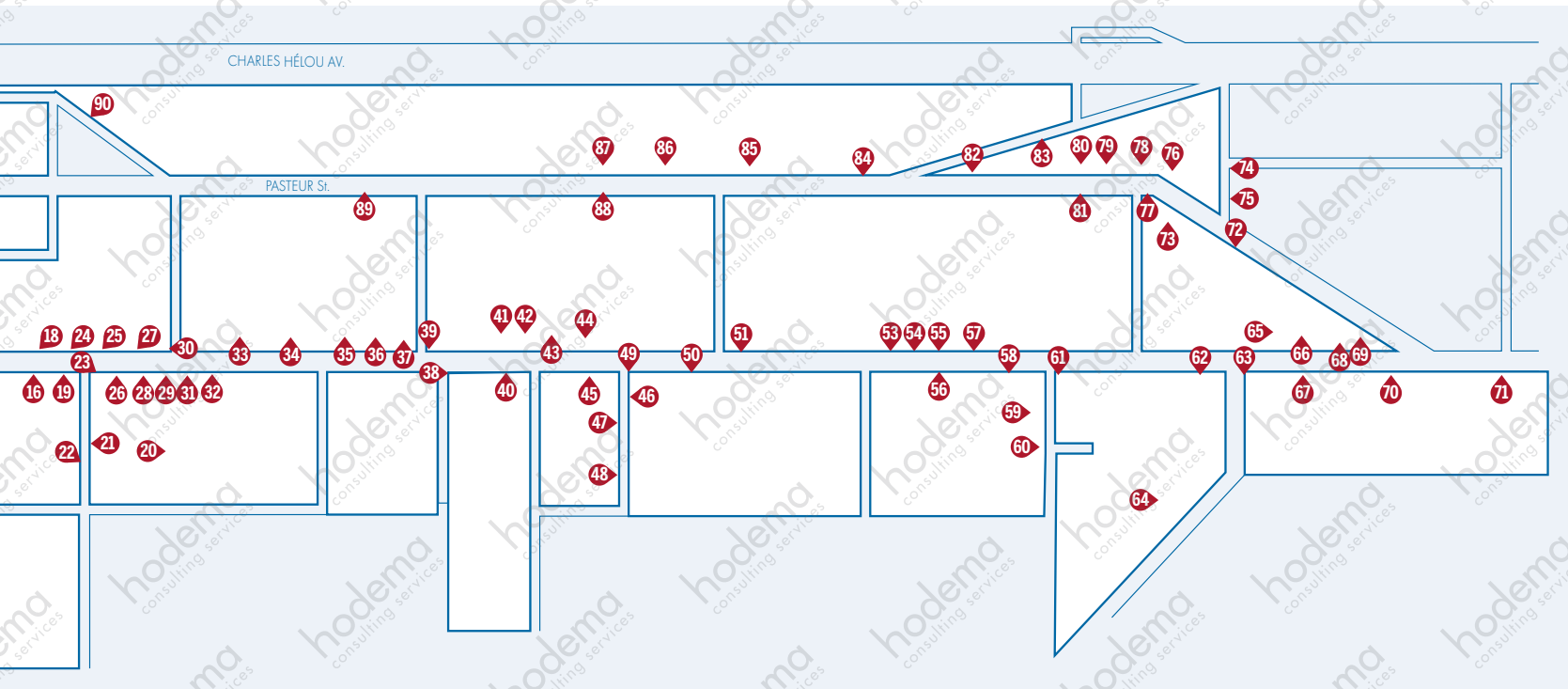


Number of F&B outlets per type of cuisine

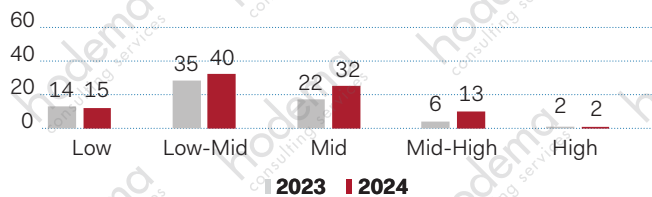


F&B outlets since 2023

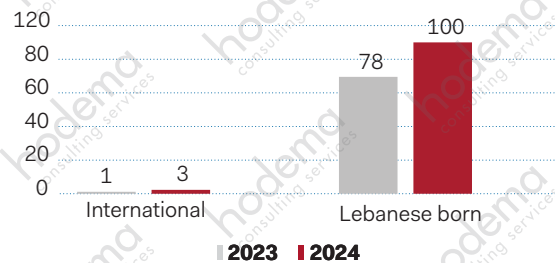
32% NEW OPENINGS



Number of F&B outlets per positioning



Number of F&B outlets per concept origin



- | | | | | |
|---------------------------------------|-------------------------------|--------------------------------------|---------------------------------|------------------------|
| 1. Centrale | 21. Fred Kitchen and Bar | 41. Pizza Guys | 61. Alia's Bookstore | 81. Flav |
| 2. Ground Floor | 22. Botaniste | 42. Slot | 62. Import Export | 82. Appetito Trattoria |
| 3. Society Bistro
Society Wine Bar | 23. Bn | 43. Sip | 63. Furn Ghattas | 83. Dead End Social |
| 4. Epikurus The Lounge | 24. Oakberry | 44. Lost Bar | 64. Mama in Cucina | 84. Paloma |
| 5. The Wine Haven | 25. Ramen-Ya | 45. Lost Pizzeria | 65. Lekmet Em Ali | 85. Bar Nouveau |
| 6. Paul | 26. Torino | 46. Un Peu Fou | 66. Kassab | 86. Loris |
| 7. Booza | 27. Yakiniku | 47. Bavaglino | 67. Kibbe Kitchen | 87. Pinch Moi! |
| 8. Le Petit Gris | 28. Dragonfly | 48. The Grand Meshmosh
Hotel Café | 68. Saj Beirut | 88. House of Butlers |
| 9. Furn Merchak | 29. Sataï | 49. Saj Stories | 69. Pti Bisou | 89. Squisito |
| 10. Demo | 30. Tabliyit Massaad | 50. Ginette | 70. Tequila | 90. Mondays Off |
| 11. Furn Wala Atyab | 31. Mitsu-Ya | 51. Moons | 71. Orso Bianco | 91. Ditto |
| 12. Cupola | 32. Neighborhood
Coffeshop | 52. Paulie's | 72. Phil & Will Deli
Gourmet | 92. Terre |
| 13. Fresca Dolce | 33. Cosmic Burger | 53. Munchease | 73. Pint | 93. Mii-Yao |
| 14. Snack Hayek | 34. Pub 22 | 54. Dripd | 74. Coffeetastic | 94. Zita Beirut |
| 15. Dar Beirut | 35. Urbanista | 55. Daily Dose | 75. Baked in Beirut | 95. SLD Bar |
| 16. Drink & Sing | 36. Home of Herbs | 56. Fareed Eatary | 76. Furn Saadeh | 96. Marzano |
| 17. Kami | 37. Salata | 57. Avolique | 77. Olga's Shawarma | 97. Tappo |
| 18. Swiss Butter | 38. Standard Café and Bar | 58. The Barn | 78. Cyrano | 98. Mon Maki A Moi |
| 19. Levant | 39. 16 mm | 59. Couqley | 79. Mayrig | 99. Jive |
| 20. Arthaus Kitchen | 40. Le Chef | 60. Mavia's Bakery | 80. Blush | 100. Pastis |
| | | | | 101. Husk |

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Hamra *Barely hanging on*

While Hamra used to be the hub for nightlife - the Soho of Beirut you could say - the zone has been severely impacted by Lebanon's economic crisis. Of all the zones surveyed in the capital by Hodema this year, Hamra is the only one to have seen a drop in outlets.

There are now only 94 F&B outlets in the district, compared to 101 last year giving it a decrease of almost 7% in supply. Within the time period of 2019 to now, Hamra has seen 84 establishments close, 16 of which have closed since April 2023, including Gelato Show, Tomatomic, and The Bruws. Of the 16 closures, only five have been replaced with new F&B concepts.

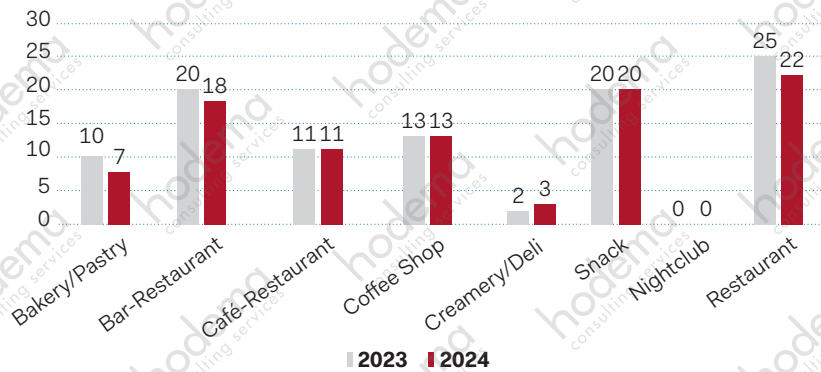
In total, there are nine newly opened outlets since Hodema's last report in 2023. Two new brands have found their home in The Food Hub on Hamra's main street, namely the ice cream shop Fregola. The most present food offerings in Hamra are international and Arabic cuisines, served in snack form.

Remarkably, there are still landmarks which have long been present in Hamra that are still open, such as Jai which offers Asian cuisine and has been operating since 2012, Kababji, a country-wide brand focusing on Lebanese cuisine - though is rumoured to be moving to a new location - Mezyan which has been operating since 2011 and offers Mediterranean cuisine and Ferdinand, a gastro pub serving international cuisine and operating since summer 2013.

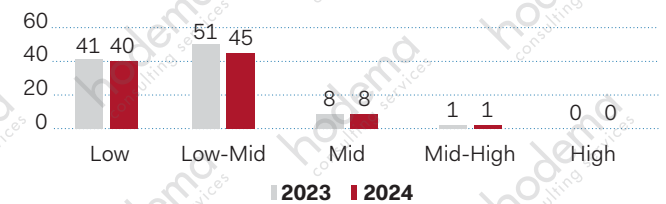
The Lebanese born pizza brand, Pizzanini which operates multiple outlets across the country, has also moved its outlet in Bliss to Hamra and now has a seating capacity of 20. The majority of the newcomers - 77% - are positioned in the low-end segment, meaning there has been no shift in purchasing power in the neighborhood since last year. The zone has witnessed in the past year a decrease in the total seating capacity going from 4,907 in 2023 to 4,664 in 2024.



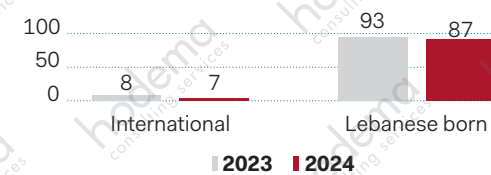
Number of F&B outlets per category



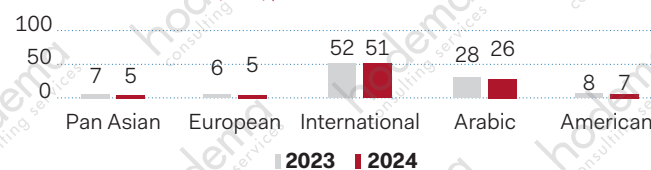
Number of F&B outlets per positioning



Number of F&B outlets per concept origin



Number of F&B outlets per type of cuisine



F&B outlets since 2023

16 CLOSED

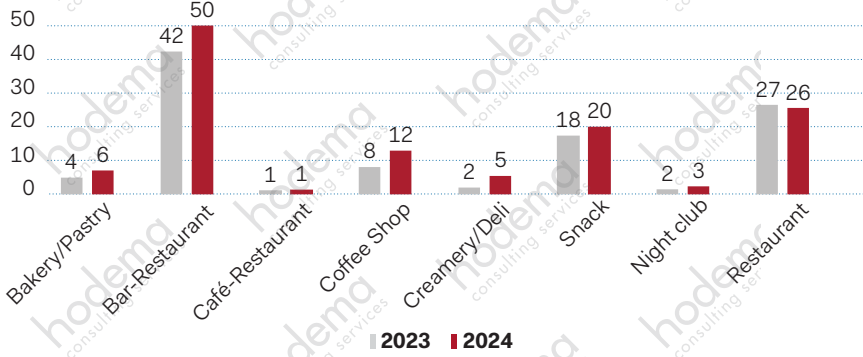


- | | | | | |
|-------------------------|------------------------|-----------------------|------------------------|-----------------------|
| 1. Jai Kitchen | 20. Spiced and Sliced | 37. Propaganda | Tavern | 71. Crown Plaza Hotel |
| 2. Friendly Café | 21. Kababji | 38. Locks | 53. Nougatini | Chopsticks |
| 3. Zeina | 22. Dunkin' | 39. Topsy Goose | 54. Tasty | Deek Duke |
| 4. Uncle Joe | 23. Snack El Hamra | 40. Hamra Express Bar | 55. Raseef Beirut | Vivaldi |
| 5. Falafel Aboulziz | 24. Sushi Lovers | 41. Silver Crumbs | 56. Chkn.Co | 72. Shah |
| 6. Special Bakery | 25. Hani's Snack | 42. Oregano | 57. D'coffee Shop | 73. Sandwich w Noss |
| 7. Dar Wadieh | 26. Iraq El Kheir | 43. Hamra Kitchen | 58. Snack Chehab | 74. Crepaway |
| 8. Salon Beyrouth | 27. Rossa Café | 44. Wrapped B Chou | 59. Le Commodore | 75. Ferdinand |
| 9. Praliné | 28. Kabset Zer | 45. Ka3kaya | Benihana | 76. Neighbours |
| 10. Golden Sheep | 29. Dandana Resto-Café | 46. Takkoush Bakery | Cucina | 77. Citizen Smith |
| 11. Patchi | 30. Hamra Bey | 47. Afandina | 60. Café Younes | 78. Barjees |
| 12. Asir Al Salam | 31. Abou Naim | 48. Pizzanini | 61. Sam's | 79. Chocolate Bar |
| 13. Furn Abdul Aziz | 32. Café Al-Habayeb | 49. AT Bites | 62. Roi Des Frites | 80. Al Mouajjanati |
| 14. Terghalle | 33. Patchi | 50. Food Hub | 63. Gustav | 81. Zaatar w Zeit |
| 15. T-Mart | 34. Hamra Square | The Food Hub | 64. Appetito Trattoria | 82. B-Hive |
| 16. Burj Al Tayeb | Hamra Juices | Daddy's Food | 65. London Bar | 83. Crackers |
| 17. Furn Al-Makdissi | Little Beirut | Fregola | 66. Ales & Tales | |
| 18. Good To Go | Starbucks | Prince Pizza | 67. Rabbit Hole | |
| 19. Hamra Urban Gardens | T-Marbouta | The Hub Café | 68. Li-Beirut | |
| Bayt Em Nazih | 35. Mezyan | 51. Booza Society | 69. Mi Carino | |
| Pool D'etat | 36. Pasta Bl Eelbe | 52. Bedivere Eatery & | 70. Villa Celia | |

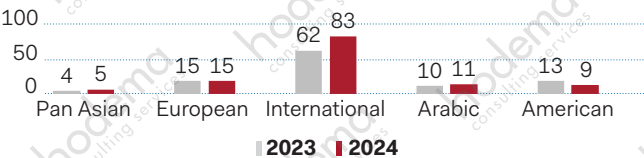
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Mar Mikhael *Rebuilt and rejuvenated*

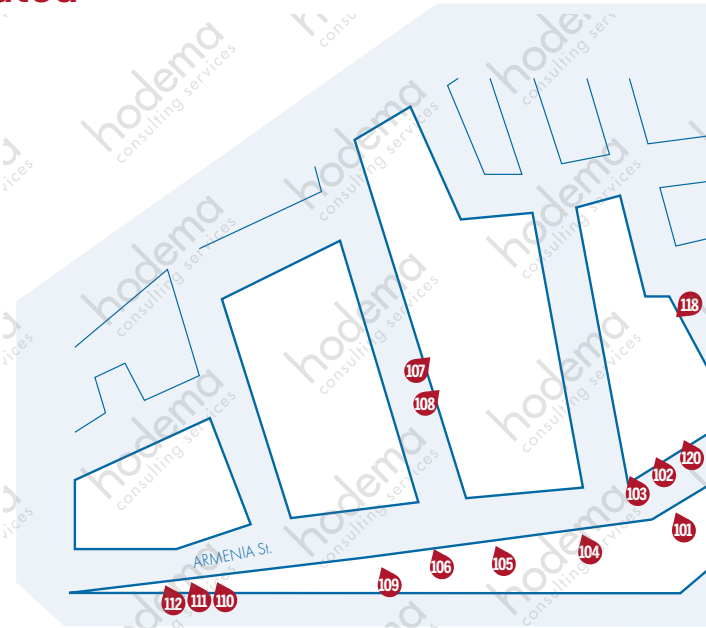
Number of F&B outlets per category



Number of F&B outlets per type of cuisine



Number of F&B outlets per concept origin



Mar Mikhael is a residential and commercial zone in the heart of Beirut, boasting the biggest F&B supply in comparison to all studied zones. The offerings range from kiosks, cafés, restaurants, restaurant bars, pubs, and nightclubs. The zone is divided into two main streets: Armenia and Pharaon streets, and although both are in close vicinity, the feel and supply of each is very different. Despite this zone having been deeply affected by the August 2020 port blast, today it is booming and striving, and a big part of it has been rebuilt and given another chance of life. The zone is known for its bar hopping experience as well as diverse F&B offering, you can find all types of cuisines, restaurants, and street food options.

In comparison to last year, in which Mar Mikhael had a total of 104 F&B venues, the zone now has 123 and a 18.3% increase in supply. Since last year's report, Mar Mikhael has welcomed 35 new concepts including Marrow and Bar and The Smoking Barrels, both focusing on meat as their offering, with a seating capacity of 40 and 16 respectively. Enab, the Lebanese cuisine restaurant is also back in Mar Mikhael after a few years of closure, with a whopping seating capacity of 300.

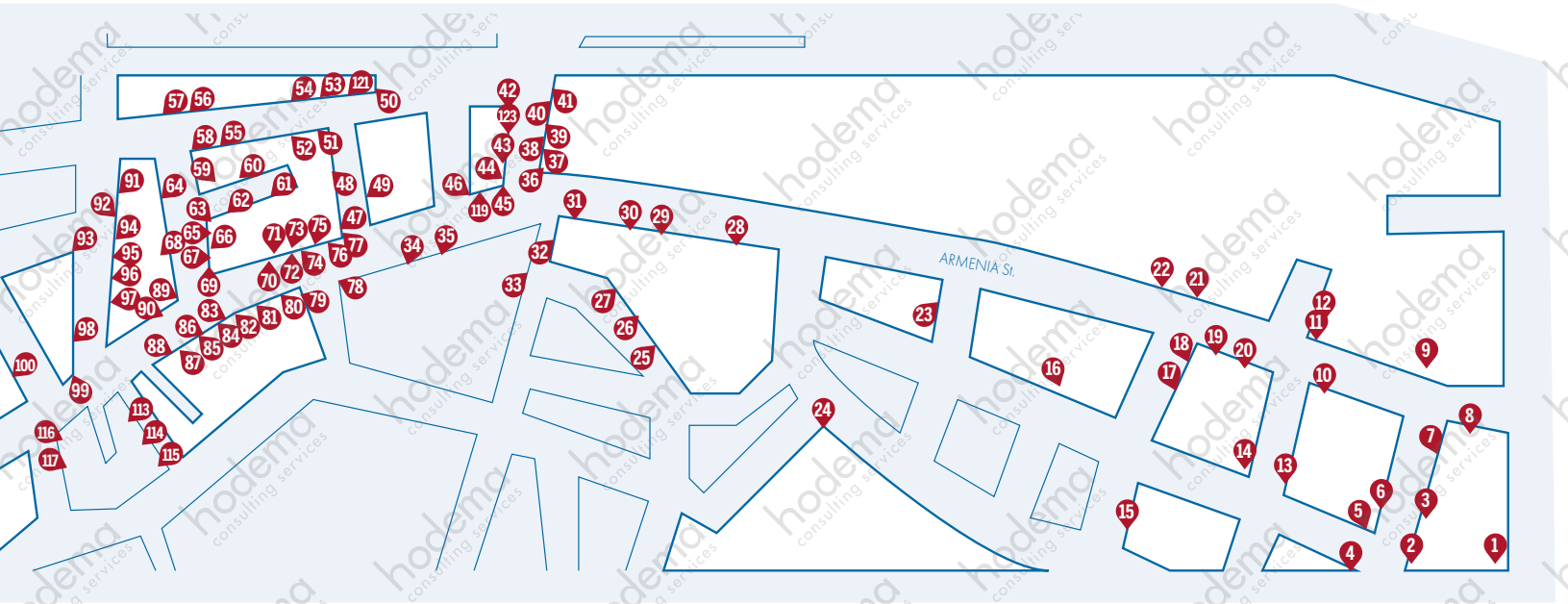
Regarding Pharaon street, many new concepts have made it their home and keep enhancing the street, of which we note, the café bar Fizz with an outdoor and indoor seating available, and Bakelab Counter, a bakery offering all sorts of baked goods.

Some of the landmarks that remain open until today are Tavolina, Oslo, Slate, Marinella, Tawlet Souk El Tayeb, Baron, and bars like L'Osteria, Internazionale, and Central Station.

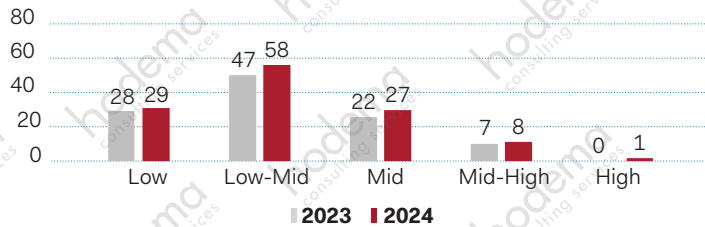
Still, Mar Mikhael has seen 17 F&B outlets close since April 2023, with the majority having been run by independent operators, including Ya Ghezayel, Uniun, and Mylos. Having said this, almost 65% of the closed outlets have been replaced with new F&B concepts, highlighting the area's continuous growth in the face of all odds. Of the 35 new outlets in Mar Mikhael, 26 serve international cuisine marking a boom in this offering.

Looking towards the future, there is a new boutique hotel project coming to the heart of the neighborhood. An open-air cultural destination that revolves around cinema and quality films to be called Metropolis will also soon open in Mar Mikhael, as well as the American brand Pizza Hut which already has many outlets around the country.

The main positioning of the market in Mar Mikhael remains at low-mid while the total seating capacity of its F&B market has seen a significant increase of almost 16% with the credit going to the many new comers.



Number of F&B outlets per positioning



F&B outlets since 2023

28% NEW OPENINGS

- | | | | | |
|------------------------|--------------------------|--|--------------------------|---------------------------------|
| 1. Tota | 26. Sole in Sight | 51. Baron | 75. Favela Beirut | 100. Pizza Hut |
| 2. The Slow | 27. Baguette Bistro | 52. Bakelab Counter | 76. Eclipse | 101. Delish - House of Shawarma |
| 3. Mr. T Coffee & More | 28. Tom & Mutz | 53. Fizz | 77. Flirt | 102. Bar 35 |
| 4. Mario e Mario | 29. Madame Om | 54. The Wooden Cellar | 78. Lantana | 103. Joe Peña's |
| 5. Seza | 30. Beyt | 55. Flat White | 79. Target Shot | 104. Oslo |
| 6. Orenda | 31. Enab Beirut | 56. O's Focacceria | 80. Abbey Road | 105. Fuego |
| 7. La Scène | 32. The Bro's | 57. Semolina | 81. The Bohemian Bar | 106. Okra |
| 8. Bachir Ice Cream | 33. Meat Me | 58. Baalbaké | 82. FabrK | 107. Boneless |
| 9. Léon Snack | 34. Shaggy's Diner | 59. Mashawish | 83. Catrinas | 108. Karma |
| 10. Chop-Suey | 35. Basterma Ohannes | 60. Soma | 84. Bonavida | 109. Parallel |
| 11. Starbucks | 36. Smoking Bun | 61. The Smoking Barrels | 85. Floyd the Dog | 110. Kaos |
| 12. Zaïa | 37. NFD Bar | 62. Caffeine Coffee Roaster | 86. Tirilalli | 111. La Fuente De San Miguel |
| 13. Riwaq | 38. By the Slice | 63. Madmen | 87. Bodo | 112. Café Kunafé 1881 |
| 14. 100 Hala | 39. Kaakeh Square | 64. Entre Deux Bistro | 88. L'Osteria | 113. Tamashii |
| 15. Kintsugi Beirut | 40. Taquitos | 65. Chaplin | 89. Stoa | 114. 3 1/2 Pub |
| 16. Makan | 41. Ô-Sake | 66. Divvy | 90. Eddy's Boneless | 115. Hidden |
| 17. Tusk Bakery | 42. The Living Room | 67. Marrow | 91. Cold Stone | 116. Underground |
| 18. Morena | 43. Smoak | 68. Smushkies | 92. The Retro Pub | 117. Chow |
| 19. Vino e Sake | 44. The Wok | 69. Internazionale | 93. Prune | 118. Mr. Bartender |
| 20. Salt Fish | 45. Frunch Eatery | 70. Vyvyan | 94. Tavolina | 119. Tenno |
| 21. Cibo | 46. Mac n' Cheese | 71. Lockstock
Stairway by Lockstock | 95. La Taberna De Martin | 120. Swirkies London |
| 22. Sister Wraps | 47. Tawlet Souk El Tayeb | 72. Crew Hut | 96. Das Küche | 121. Lettuce Meat |
| 23. While We're Young | 48. Beit Oven | 73. Amelia Restaurant & Lounge | 97. Froyo-Heaven | 122. Aleb |
| 24. Kalei Coffee Co. | 49. Lundi | 74. Central Station | 98. Slate | 123. Bun Bash |
| 25. Strada | 50. Frooza Booza | | 99. Marinella Trattoria | |

Monnot-Sodeco *Booming and Groovy*

The zone of Monnot-Sodeco is split in terms of its offerings, where one half, Sodeco, is home primarily to Lebanese restaurants near the historical Green Line. The other section, Abdelwahab Street and Monnot Street, are a residential area with high purchasing power and highly demanded by investors.

Overall, Monnot-Sodeco is starting to feel more vibrant. The outlets themselves continue to be the destination but as a whole the neighborhood is stable and Sodeco's landmarks in particular continue to do well. The clientele of the larger outlets is generally older and frequent the higher end outlets within the area, while students of the Saint Joseph University as well as those working in Beirut Digital District frequent the more budget friendly establishments.

The zone of Monnot-Sodeco seems to have had a facelift since last year, with the area now holding an overall mid-end positioning. There has been a 47% increase in new outlets with a mid-end position pushing the zone's average check to be between 30 and 50 USD.

In the last year, Monnot-Sodeco has seen the total number of F&B outlets rise to 83 compared to 74 in 2023. In terms of supply, the zone is also 12.2% higher compared to last year. Fifteen outlets have opened since Hodema's last report in 2023, with French, Italian, and international cuisines most present amongst the new comers. PizzaWa has opened on the strategic Abdel Wahab el Inglizi Street offering Italian cuisine with a cozy 65 seats. The restaurant Amavi, located on the same street started operating in April 2024, also with a menu of Italian cuisine and a seating capacity of 100.

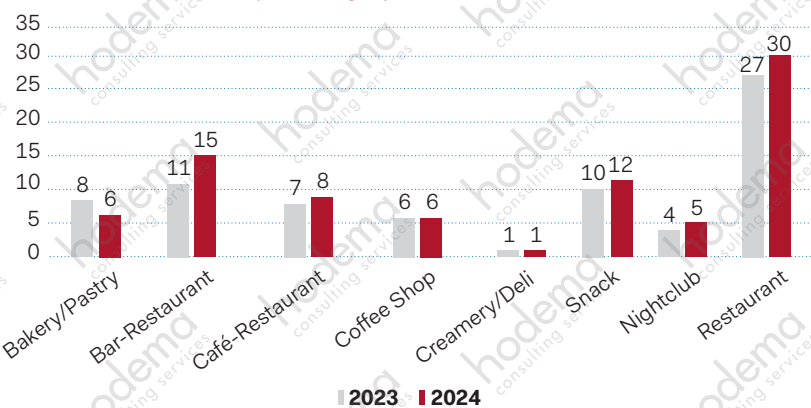
Notably, The Terrible Prince – previously known as The Happy Prince which shuttered in Mar Mikhael after the Beirut Port Explosion – reopened in Monnot with a seating capacity of 50. This prince is a fine example of how Beirut continues to rebuild and flourish.

Monnot-Sodeco has seen six F&B outlets close since April 2023 and a bit of venue shuffling. While Analogue closed, it has reopened opposite its former space replacing what used to be the restaurant bar Matisse. Now in the place of the old Analogue venue, KP, the Japanese Brasserie by Kamp Catering is yet to open its second outlet in Monnot with 130 seats.

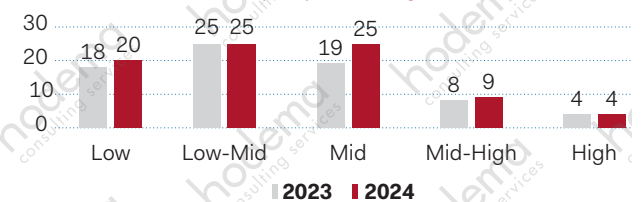
The zone still sees landmarks remain operational to today such as Al Falamanki, Em Sherif, Abd El Wahab restaurant, Liza, and Sapa. Pacifico is also standing strong and has been operational since 1997. We also note Ritage Garden, a Mediterranean-style restaurant concept with Lebanese influence still operating within the zone, as well as the seafood restaurant Kelly's Fish Lounge and the renowned French steakhouse Le Relais de l'Entrecôte.

Monnot-Sodeco has seen an increase in the total seating capacity of F&B outlets by approximately 600 seats since last surveyed in 2023, bringing the total to approximately 7,500 seats to date. The dominant positionings in the zone are low to mid-end and mid-end, meaning the most present average checks are between 15 to 50 USD, which reflects the differences that we notice in Sodeco and Monnot in terms of clientele, type of outlets, and the diversity of offerings in the zone.

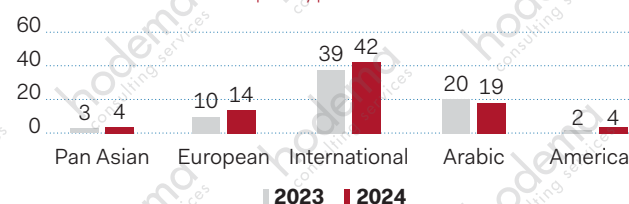
Number of F&B outlets per category



Number of F&B outlets per positioning



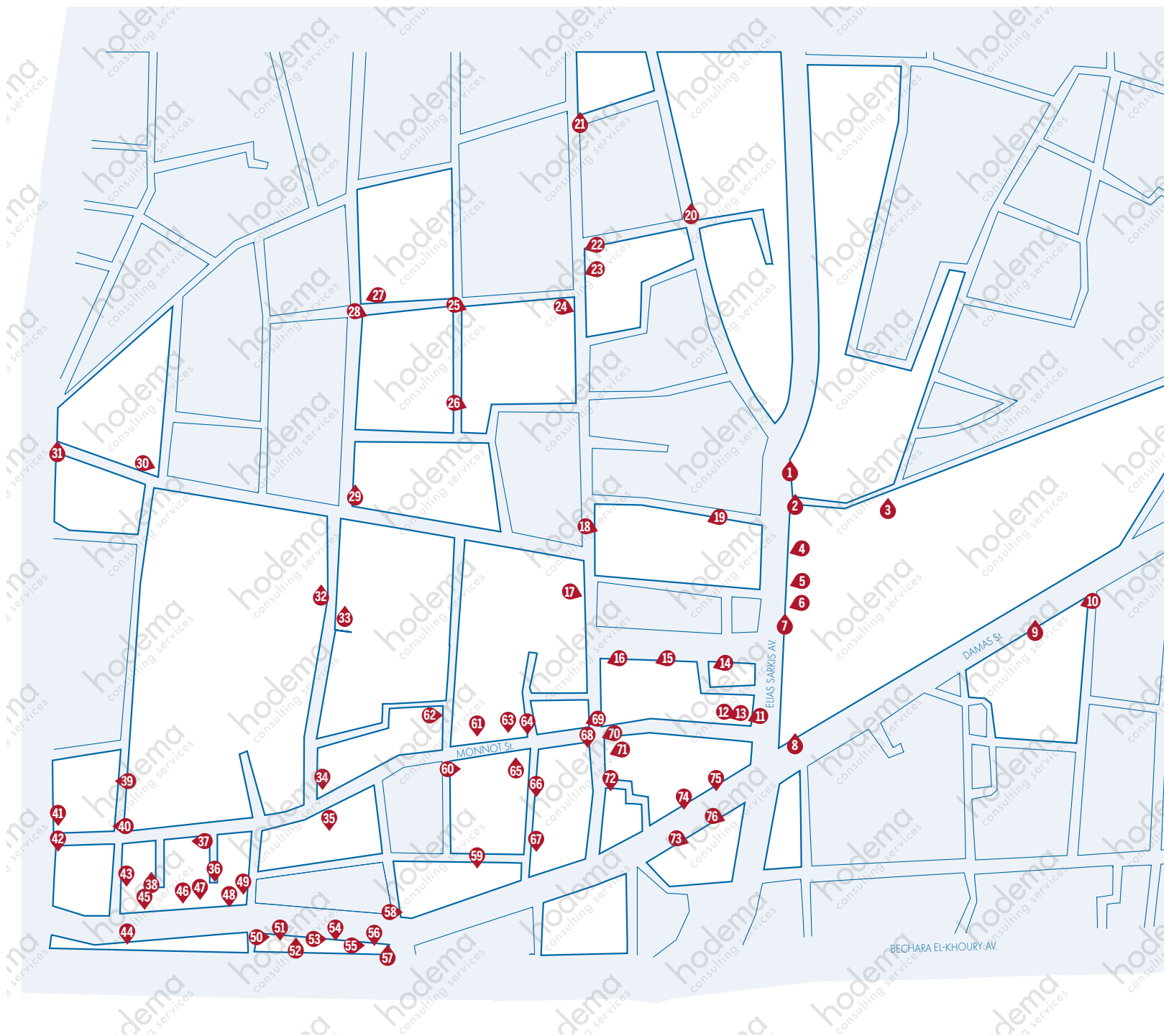
Number of F&B outlets per type of cuisine



Number of F&B outlets per concept origin



1. Zaatar w Zeit
2. El Estez Snack
3. Sapa
4. Fat Monk
5. La Goulée
6. Patchi L'Atelier
7. Café Younes
8. Sodeco Square
9. Classy Bites
10. Moulin D'or
11. Rafic El Rashidi
12. Marrouche
13. Kelly's Fish Lounge



- | | | | | |
|--|----------------------------------|--|------------------------------|-------------------------------|
| 14. Pâte à Choux | 24. PizzaWa | Matador Café | 48. Hai | 62. The Terrible Prince |
| 15. Pop in Eatery | 25. Liza | Replay | 49. Gia la Cuccina Del Amore | 63. Stove |
| 16. Kebbzet Zamen | 26. Brasserie à Trois | 37. Drink and Sing | 50. Mustafa Sahyoun | 64. Analogue |
| 17. Amavi | 27. Bread Republic/The Wine Room | 38. Hole in the Wall | 51. Falafel Sahyoun | 65. KP Brasserie |
| 18. Hotel Albergo
Albergo Restaurant and Terrace
Lobby Café and Court
Yard
Swim Club | 28. La Menagerie | 39. Puccia | 52. Malak El Tawouk | 66. Modovar |
| 19. Samakna | 29. The Spot Restobar | 40. Little China | 53. Trio Café | 67. Taiga Beirut |
| 20. Samakit Al Sultan | 30. Sweet Nothing | 41. O Monot Boutique Hotel
O Monot Lobby Bar
O Monot Restaurant
O Monot Rooftop | 54. Bite Burger's | 68. Le Relais de l' Entrecôte |
| 21. Tsunami | 31. Ritage Garden | 42. Roy Karaoke Pub | 55. Otomatico | 69. Nonna |
| 22. ENN Healthy Eating Atelier | 32. Germanos Bistrot | 43. Picasso Snack | 56. Thea Café | 70. Bobo Fou |
| 23. Al Khawaja | 33. Latte Art | 44. Falafel Tabouch | 57. Assir Al-Sultan | 71. Santana |
| | 34. The Comfort Food | 45. Mood Beirut-Night | 58. Chababik | 72. Abd El Wahab |
| | 35. Zur Café | 46. B for Burger | 59. Em Sherif | 73. Kahwet Azmi |
| | 36. Celtic
Celtic Irish Pub | 47. Sky High Club | 60. Andalusia | 74. Anbar |
| | | | 61. Pacifico | 75. Dunkin' |
| | | | | 76. Falamanki |

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Sassine *Plateaued offerings*

Sassine in itself is a landmark of Beirut, home to a mix of residential apartments, offices, universities such as AUST, hospitals such as Hotel Dieu, retail shops, and ABC mall. As a destination, the F&B outlets cater primarily for day time dining but does not fall short as a night destination as well.

The zone has remained stable over the last year, with 1.1% growth in the market, home to 89 establishments now compared to 88 F&B outlets in 2023. Since April 2023, seven F&B outlets have closed including the multi-national KFC which had been operating in the middle of Sassine square for more than eight years.

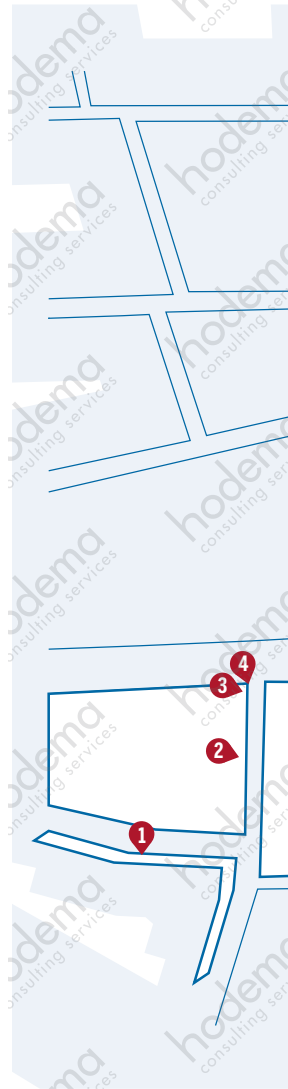
Still, the neighborhood has welcomed six new venues since Hodema's last report in 2023, most of which are positioned in the low-end with a mix of international, European and Arabic cuisines.

Notably, Al Massoud Grill already located in Fanar, has opened its second outlet in Sassine serving Lebanese cuisine sandwiches and grills with a seating capacity of 24. Two new street food outlets have also opened their doors: Durumji which offers Turkish street food, and Beit Al Shawarma which serves Shawarma sandwiches and platters.

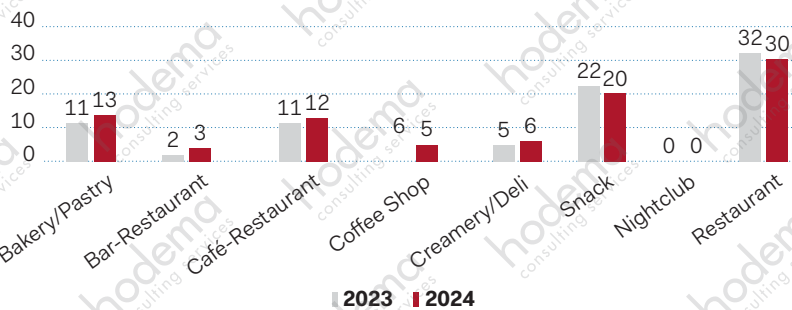
ABC is regaining its importance in the zone of Sassine with several new upcoming local and international openings such as Joe and the Juice, Pinkberry, and Oh My Gelato!. Sassine in general is a sure bet for investors, and continuously seems to be moving forward, striving and a somewhat ageless area.

Landmarks such as Diwan Beirut, Starbucks, the Lebanese street food eatery Hajj Nasr, Freiha which is specialized in falafel and shawarma and has been operating since 1945, and Boubouffe are still notably operating in Sassine. While not landmarks per se, Fine Bouche and Brewholic Café which have opened in the past few years are still remarkably busy today.

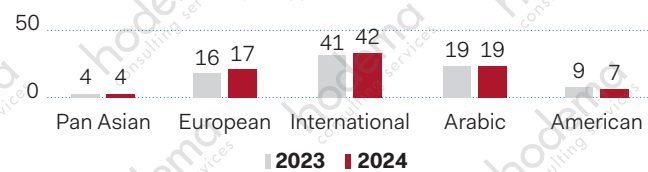
In the past year, Sassine has witnessed a decrease in the total seating capacity, going from approximately 5,570 in 2023 to around 5,390 in 2024 in part due to the closure of KFC and The Brick House, which both boasted a large number of seats.



Number of F&B outlets per category



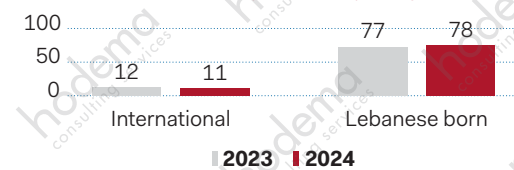
Number of F&B outlets per type of cuisine



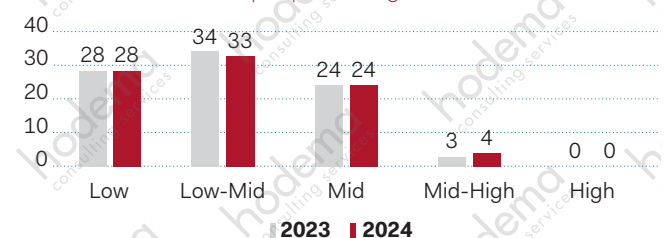
F&B outlets since 2023

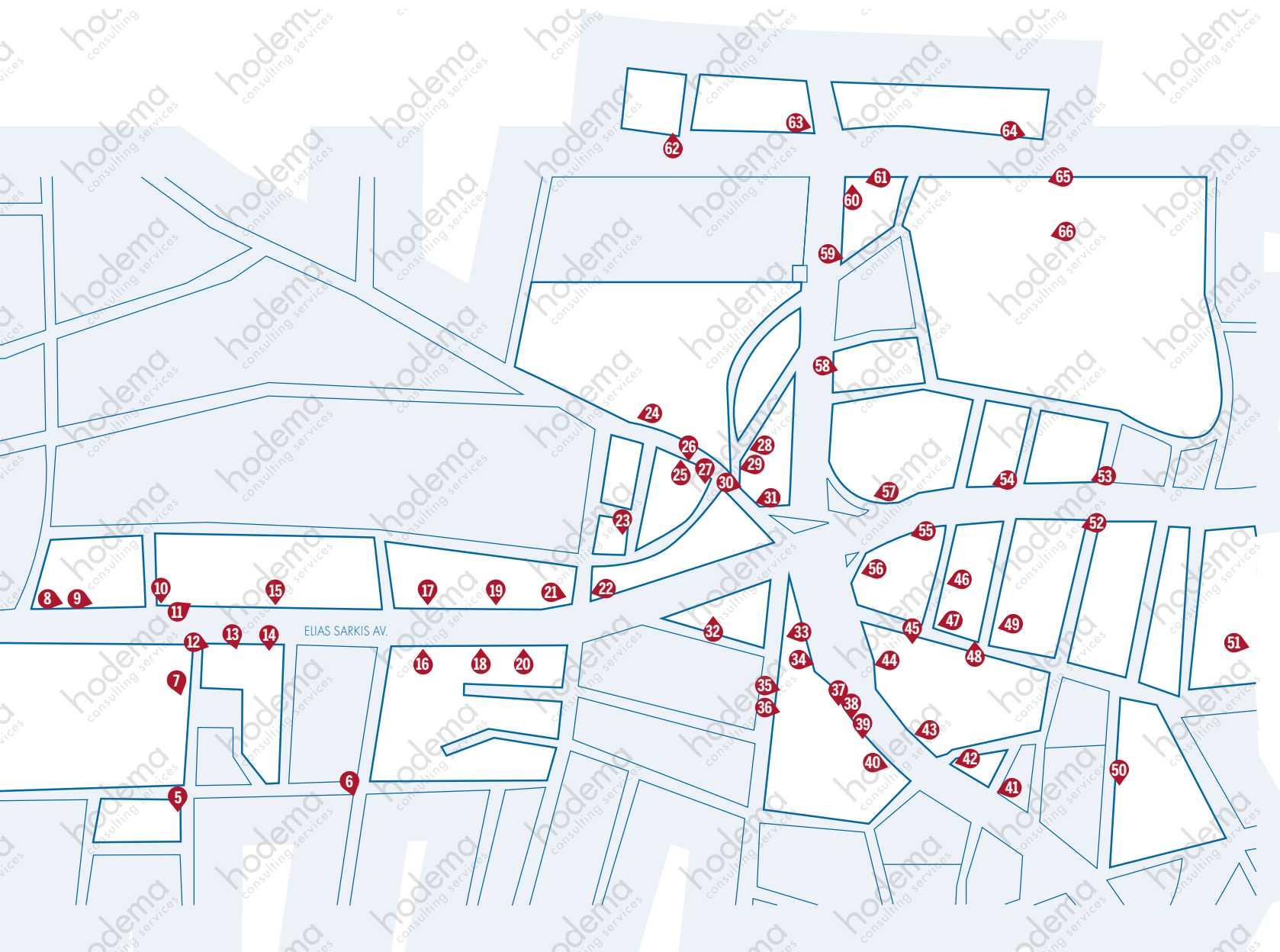
7% NEWLY OPEN

Number of F&B outlets per concept origin



Number of F&B outlets per positioning





- | | | | | |
|----------------------------|-----------------------|-----------------------|--------------------------|------------------------|
| 1. Furn Atallah | 16. Fine Bouche | K-Roll | 33. Helwayet Jean | 49. Amaretti |
| 2. Park Tower Suites | 17. Le Flocon Artisan | La Mie Doree | 34. Burger King | 50. Mouajanet Jean |
| 3. Crepaway | Glacier | Leila | 35. Al Massoud Grill | 51. Nicolas Café Resto |
| 4. Dürümji | 18. Saab | Lina's | 36. Tonino | 52. Green Café |
| 5. East Village | 19. Hoda et Chocolat | Napoletana pizzeria | 37. Pain D'or | 53. Sushi Star |
| Neighborhood Eatery | 20. Patisserie Savoie | Ni caffè | 38. Beit Al Shawarma | 54. Cask and Barrel |
| 6. La Vie Claire | 21. Niu Poke | Paul | 39. Fouad Douaihy Sweets | 55. Al-Rifai |
| 7. Pizzeria Del Vico | 22. Brewholic Café | Roadster Diner | 40. Kababji | 56. Douaihy Sweets |
| 8. Julia's Bistro | 23. Furn Nour | Starbucks | 41. Le Crémier | 57. Starbucks |
| 9. Tribu | 24. ABC | Urbanista | 42. Royal Tulip | 58. Ashrafieh Café |
| 10. Chili's Grill & Bar | Abdel Wahab | Zaatar W Zeit | Ristretto | 59. Kabab 365 |
| 11. Sofitel | Bartartine | Joe & the Juice | Rooftop | 60. Achrafieh Chérie |
| La Verriere | Casper & Gambini's | Sablés gourmets | Symphony | 61. Bread and Salt |
| 12. Mr. Brown | Classic Burger Joint | | | 62. Deek Duke |
| 13. Cantina Beirut | Cold Stone | | | 63. Diwan Beirut |
| 14. Cantina Sociale | Cozmo Café | | | 64. Sushi Circle |
| 15. Des Choux Et Des Idées | Divvy | | | 65. Boubouffe |
| | DipnDip | | | 66. Lala Chicken |
| | Duo | | | |
| | Dunkin' | | | |
| | | 25. Falafel Freiha | 43. Beit Moussallem | |
| | | 26. En Fête | 44. Hajji Nasr | |
| | | 27. Noura | 45. B Fresh Cocktails | |
| | | 28. Boneless 28 | 46. Doudou | |
| | | 29. Malak Al Tawouk | 47. Furn w Moajjanat | |
| | | 30. Spiced and Sliced | 48. Le Voleur | |
| | | 31. Fred's Food | | |
| | | 32. Chatime | | |

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Verdun *Slowly waking up*

Verdun has long been and still is primarily a destination for family outings, situated in a high-end residential area also home to business offices. The zone is not known for its nightlife as it lacks any bars and hosts mainly cafés and restaurants.

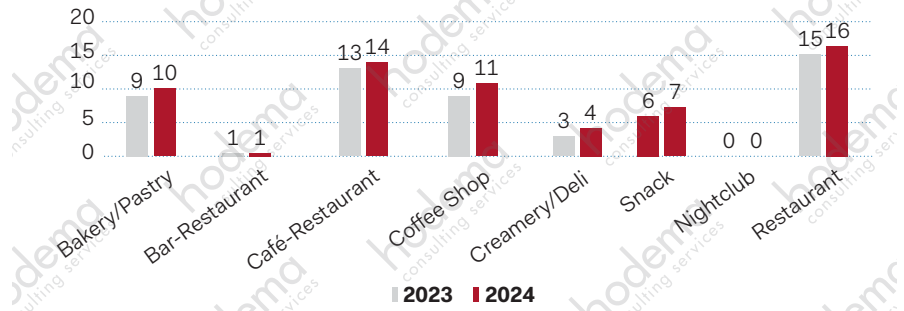
As of this year, there are 61 F&B outlets on offer in Verdun, compared to 54 in 2023, making the zone now 12.5% higher in terms of supply. There are nine new establishments which have opened since Hodema's last report in 2023, one of which is the local coffeeshop brand Stories which we have witnessed expand nationwide in the past year. Stories has chosen the renown Dunes Center to open one of their branches with a seating capacity of 12.

Within the same building, the café restaurant Kiss the Spoon – first opened in the area of Dbayeh – has also opened, offering international cuisine with a seating capacity of 18. Kiss the Spoon falls into tow with the most present cuisine – international – in the neighborhood. Almost the entirety of the newcomers to Verdun are positioned as low-mid, mirroring the majority of this zone's positioning in terms of the F&B market available.

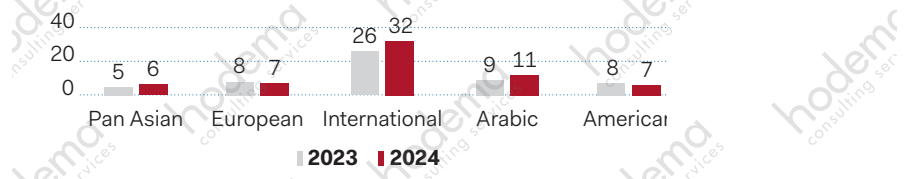
Three outlets in Verdun have closed since April 2023, all of which were present in ABC mall. One of the two Starbucks in the center has closed, Lily's Café, as well as Casper and Gambini's, which has forced a decrease in the total seating capacity of the zone. To date, none of these outlets have been replaced.

Several establishments are announced to come to the ABC mall in Verdun this year such as the famous Joe and Juice, the well-known frozen yogurt parlour Pinkberry, and the Lebanese-born Italian restaurant Tavolina. Landmarks which still remain open in Verdun include Amore which has long been located in the Verdun 732 building, and Starbucks which also remains open in the same building. Goodies the well-known high-end grocery store encompassing a restaurant which started operating in 1979 and Bartartine in Dunes are other landmarks still open in Verdun.

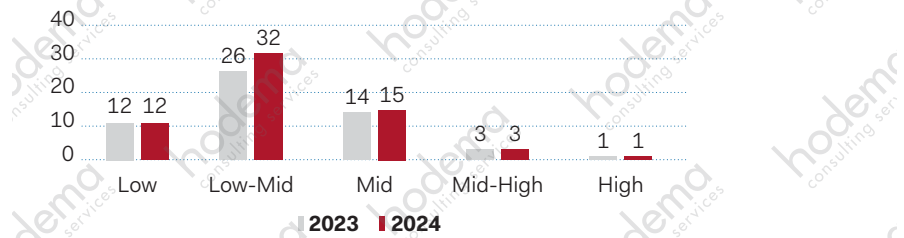
Number of F&B outlets per category



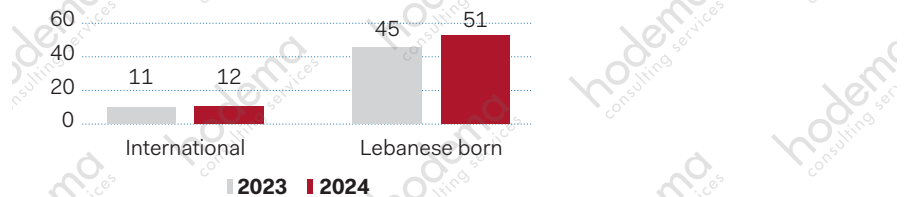
Number of F&B outlets per type of cuisine



Number of F&B outlets per positioning

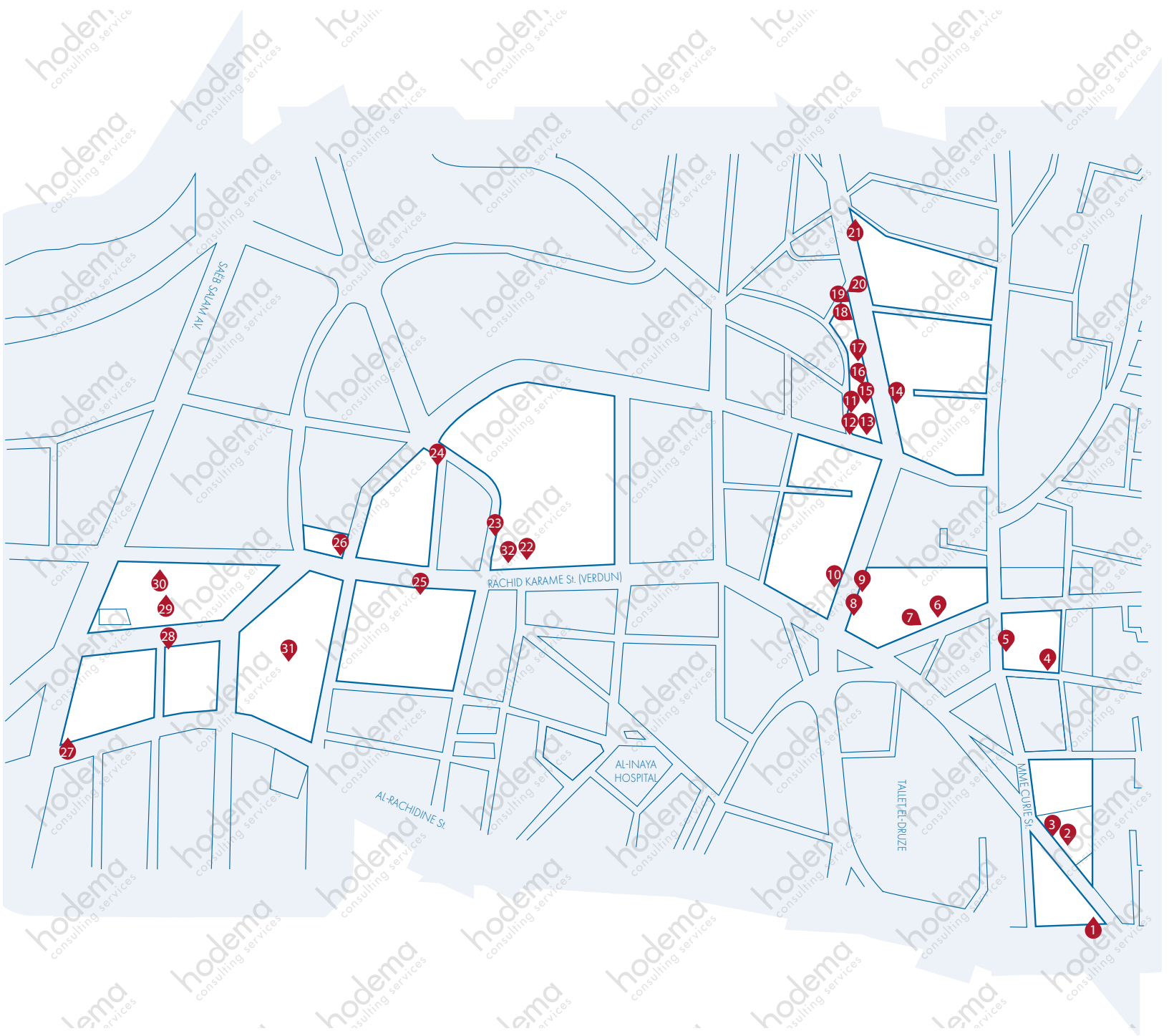


Number of F&B outlets per concept origin



F&B outlets since 2023

14% NEWLY OPEN



- | | | | | |
|-------------------------------------|-----------------------------|---------------------------|------------------|--------------------------------------|
| 1. Snack Al Jazeera | 12. Azakir Snack & Shawarma | 24. Kozz Café | DipnDip | Joe & the Juice |
| 2. Concorde
Café Nahreez | 13. Pain D'or | 25. Verdun 732
Amore | Dunkin Donuts | Pop City |
| 3. La Montre Café | 14. Al Wazzan | Starbucks | Frooza Booza | The Glow Paradise |
| 4. Hekam | 15. Juicy Frutti | Kiss the Spoon | Illy Café | Tavolina |
| 5. Rice and Spice | 16. Sugar Daddy's | Stories Coffee | K Rolls | |
| 6. Staybridge Suites
Lobby Café | 17. Al Baba Sweets | 26. Dunes
Bartartine | Leila | 28. Ghazal |
| 7. Swiss Butter | 18. Quatch | Cookhouse | Ni | 29. Vedrun Plaza 2
Khatoun |
| 8. Karakna | 19. Kahwet Koreitem | McDonald's | Patchi Café | 30. Ahwet Verdun |
| 9. Little Prince's Chiffon
Cakes | 20. Amal Bohsali | Shagun to go | Paul | 31. Four Points by Sheraton
Hotel |
| 10. Samra Café | 21. Oslo | The Shogun Lounge | Roadster Diner | Blue Patio |
| 11. Hiba & Nour | 22. Goodies | Zaatar w Zeit | Starbucks | Four Points Bar |
| | 23. Pâte à Choux | 27. ABC
Caspresso Café | Zaatar w Zeit | Four Points Restaurant |
| | | Deek Duke | Lord of the wing | Le Jardin International |
| | | | Chatime | 32. Cannelle |
| | | | Uncle fluffy | |
| | | | Burger King | |

Zaitunay Bay *Still sailing*

Zaitunay Bay continues to be a popular and touristic destination due to its open-air seating, location on the waterfront, and proximity to hotels.

Zaitunay Bay caters for varied clientele, including tourists visiting Beirut, both from neighboring Arab countries such as Jordan, Egypt, and Iraq, as well as internationals, providing shisha with a lovely view of the marina and fresh air in spacious outdoor areas.

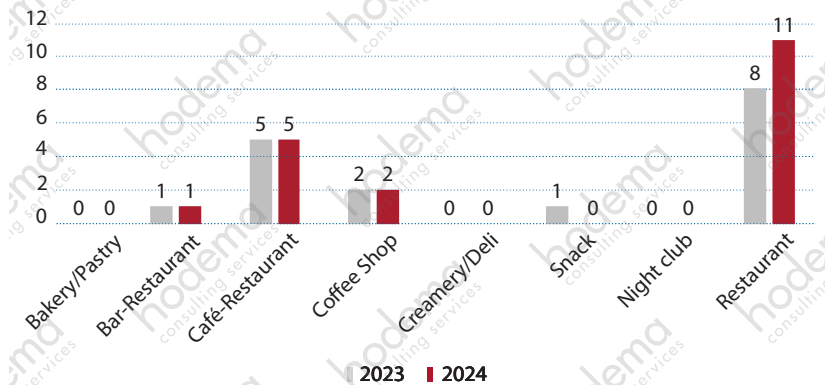
Last year, the zone was home to 17 F&B outlets, and in 2024 there are 19. The sea-fresh area has seen an 11.8% increase in supply compared to last year, with no outlets closing their doors since April 2023.

The Italian restaurant Appetito Trattoria is one of three newly opened F&B outlets in Zaitunay Bay, a Lebanese brand with various locations in the country. Hodema has noticed a slight increase of 6% in the total seating capacity of the area thanks to the newly opened concepts in the last year.

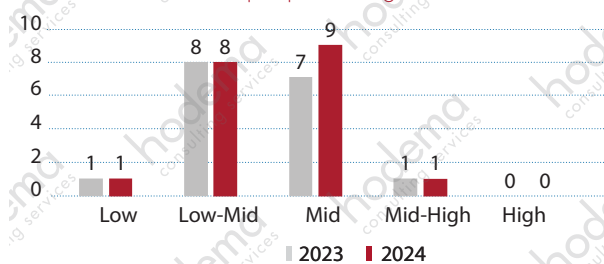
While Arabic food remains very present within this zone, the return of other cuisines can be experienced in the area, with Italian and Asian as an example. Sushi Star, an Asian eatery, has also recently opened its doors in Zaitunay Bay, with a seating capacity of 70 seats. Classic Burger Joint has rebranded its Zaitunay Bay branch and now goes by the name Szzl by Classic, keeping almost the same menu and seating capacity.

Em Sherif sea café and Babel Bay, both offering Lebanese cuisine remain the anchors of the zone.

Number of F&B outlets per category



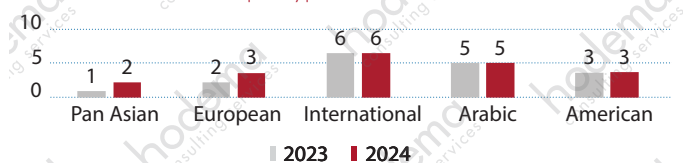
Number of F&B outlets per positioning



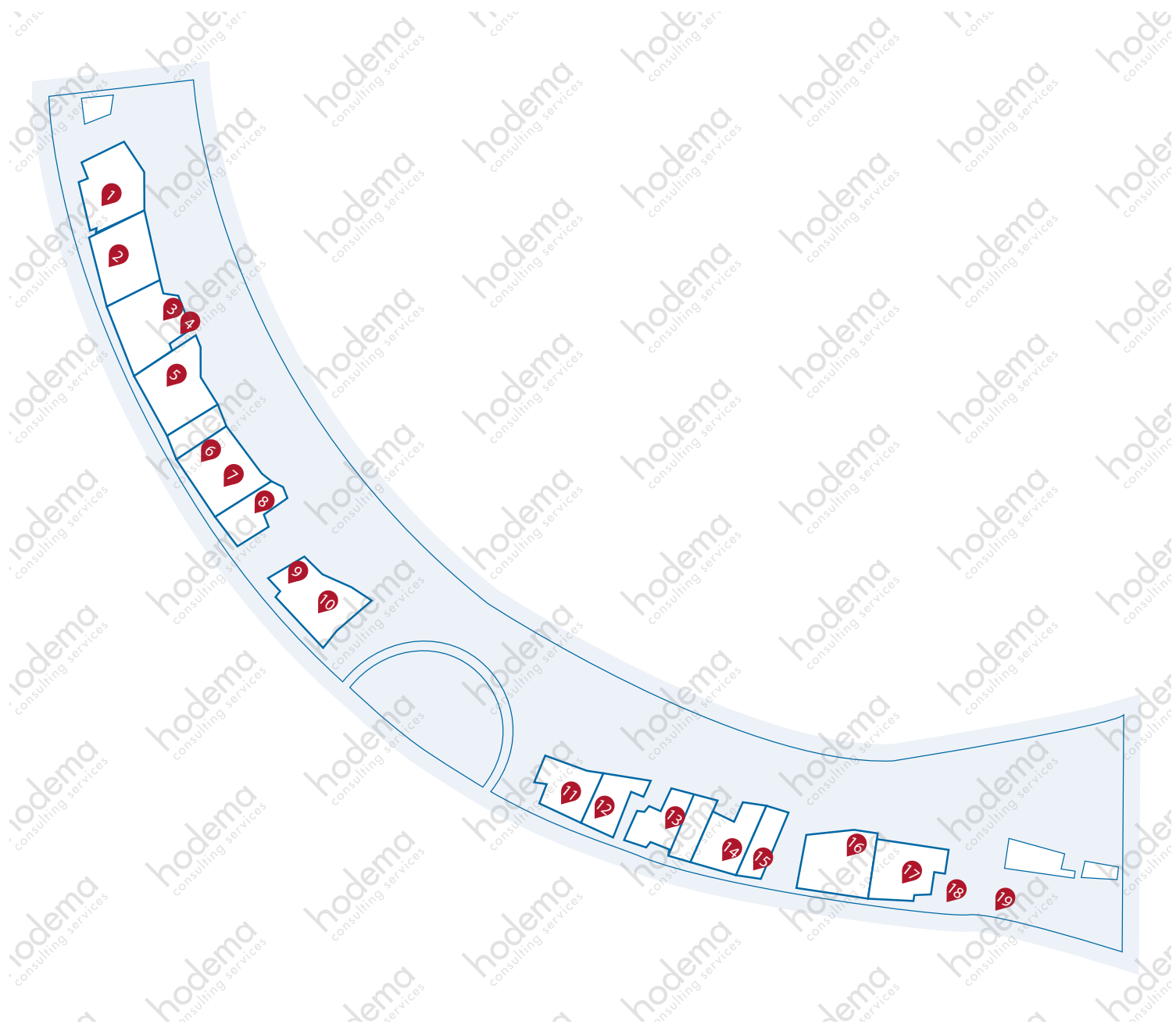
Number of F&B outlets per concept origin



Number of F&B outlets per type of cuisine



28.7% INCREASE IN MID-END POSITIONED F&B OUTLETS



- 1. Em Sherif Sea Café
- 2. Leila
- 3. Roadster Diner
- 4. Sushi Star by the Sea
- 5. Niu Poke
- 6. Mediterraneo
- 7. Appetito Trattoria

- 8. Zaatar w Zeit
- 9. Starbucks
- 10. Szzl Burger
- 11. Cozmo Café
- 12. Second Cup
- 13. Batchig sur Mer
- 14. Bartartine

- 15. Paul
- 16. Ahwet Zeitouna
- 17. Babel Bay
- 18. Grid
- 19. Fattouh

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About Hodema

Established in 2004, Hodema is a leading provider of professional consulting services for the hospitality, retail and real estate industries within the Middle-East and Africa.

Through our industry knowledge and financial expertise, Hodema helps business owners develop the necessary competencies and differentiating factors to achieve long-term success and solid profitability.

Our services to hospitality are highly recognized within the industry and our company has been listed as a reference by prestigious publications, including the Financial Times.

With its proven track record of business mentoring and development services, Hodema can build value for your company.

With offices in Lebanon, Hodema is committed to providing turnkey solutions

and to intervene at different stages of a project providing continuous support and key solutions to developers, owners and operators of hotels, F&B projects, real estate ventures, spa, malls, leisure centers, as well as retail projects, investment groups, banks, and governmental institutions.

Should you wish to analyse a specific market, open a hospitality project, franchise an existing one, review a preliminary idea, or assess a real estate property or a retail project that you want to develop successfully and profitably, Hodema can provide you with feasible solutions that best suit your needs.

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Hodema's management team has over thirty years of experience in various industries including hotels, food & beverage, retail, real estate, communication and finance, and share extensive international exposure in the following regions: Middle East, Africa, Asia, Europe and North America.

