

Hodema news #11

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hodema
consulting services



Growing in the midst of instability

Written by Nagi Morkos, Managing partner at Hodema consulting services

The year 2016 just ended, with a series of positive developments, after a long period of instability and turmoil. The election of Lebanon's new president following years of deadlock could be the sign of a new era for our crisis-hit country. More stable institutions is good news for all aspects of the political and economic spectrum: the country's growth could increase by 3.3% next year, according to the International Institute of Finance, with the IMF forecasting a 2% growth for 2017. Diplomatic ties with GCC countries – affected in recent years – should go back on track, and with them business and tourism activities. Investors and visitors from Western countries are also coming back after favoring other destinations.

Drawing tourists back

Tourism is set to be one of the key sectors to benefit from this bright spell, with the former Minister of Tourism who campaigned to restore the country's thriving industry and develop domestic and rural tourism, drawing on Lebanon's 2,000 multicultural sites and monuments. The recent launch of the 'Phoenician Tourism Route', a cultural itinerary linking 18 countries and more than 80 towns around the Mediterranean Sea, will also provide a major boost and help celebrate the region's heritage. The industry was already showing signs of recovery even before President Aoun's appointment, with a 7.7% increase in arrivals in the first six months of 2016 as compared to the same period last year. However, several worrying issues still remain. Lebanon is still in the eye of the storm that has been lashing the region in recent years, with the Syrian conflict still directly impacting the country's security and economic growth and the Syrian refugees - over one million - flocking in the country.

Promoting the Lebanese brand

As a key player on the Lebanese hospitality market, we are proud to contribute to the promotion of Lebanon's image as a touristic destination. In 2014, we took part in Kalam Ennass episode that was broadcasted live on LBCI from Zaitunay Bay in Beirut. The show launched the 'Live Love Lebanon' campaign, in collaboration with former Minister of Tourism Mr. Michel Pharaon, to boost domestic tourism

and attract foreign visitors. Hodema was actively involved in the campaign, providing advice throughout the launching period.

In the midst of these challenging times, Hodema is holding its course, with a constant eye for fresh and innovative trends. In 2014 and 2015, we have successfully completed over a hundred projects in the Middle East and Africa regions, from hospitality projects to retail business and large mixed-use venues.

Our comprehensive overview of the industry also benefits Food and Beverage, hospitality and real estate companies looking to build value and avoid the pitfalls that many projects face. In the last few years, we have been involved in stimulating ventures, developing sustainable mixed-use projects and providing insight and analysis to advise top Food & Beverage companies, large scaled real estate owners and developers as well as hotels on their strategies for success. After having expanded our services and know-how to the rest of the region with a strong presence in GCC countries and Egypt, we are currently exploring new territories, namely Europe with France and Greece.

Hodema partners participate regularly as exhibitors, sponsors, guest speakers and moderators not only in regional trade shows among which Dubai's Gulfood, Global Restaurant Investment Forum (GRIF), and Saudi Horeca in Riyadh, but also in Lebanon taking part in Horeca and the Annual Hospitality Forum (AHF).

A team of multi-skills consultants

Our satisfactory track record over the years is down to our team of consultants and analysts, each of them using its expertise and skills to serve our clients. We strive to keep Hodema's leading position as a regular contributor to the business magazine Le Commerce du Levant, as well as Hospitality News where we publish features and special reports. Our company mirrors our dynamic and ever-changing environment: our senior consultants and managers Nada Alameddine and Toufic Akl have become partners in 2015, bringing their know-how to shape Hodema's future. Nada is in charge of business development inside and outside Lebanon. She has been working in the hospitality sector for 18 years, holding senior managerial positions for the hotel industry's international brands

such as Marriott and Hilton, and has been teaching sales and hospitality related courses at Beirut's Saint Joseph University since 2001. Toufic handles operations and project implementation. He has been working in this sector for over 20 years and developed his Food and Beverage expertise by working for major companies in Lebanon, the Gulf and Canada after graduating from the renowned Ecole Hôtelière de Lausanne in Switzerland.

Rewarding past performances can usually lead to future successes. We take pride in our track record which encourages us to continue building a strong and stimulating team, expand our activity introducing new services, enlarging our area of coverage, and last but not least, team up with key partners that will open up the doors to new ventures.



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Interview: Dany Chaccour

Chief Executive Officer of SGR Offshore



Dany Chaccour is the CEO of SGR offshore, the "franchising arm" of the successful Em Sherif, La Parrilla and Em Sherif Café brands.

Previously managing partner of Afriways Ltd, a business development firm specialized in acquiring telecommunication and security concessions in Africa, Dany joined the Food and Beverage business in 2011 initially to assist his sister Mireille Hayek, the lady behind La Parrilla and Em Sherif restaurants. Today, he allocates 80% of his time to the "franchising adventure", and the little left is used to overlook the passport concessions in Gambia, Nigeria, Malawi and Guinea Republic.

Dany holds a Bachelor degree in Economics from Saint Joseph University and an MBA from the Lebanese American University in Jbeil.

Can you describe the projects Hodema assisted you with?

Hodema assisted us in producing the franchise and training manuals for Em Sherif and La Parrilla restaurants, and is currently assisting us with Em Sherif Café manuals.

What was Hodema's added value as your projects' consultant?

Hodema first advised us on the way forward. We were not planning to franchise neither Em Sherif nor La Parrilla despite the huge demand. It is thanks to Hodema that we finally opted for the franchise model, and started considering partnerships outside Lebanon.

Why expanding Em Sherif restaurant outside Lebanon?

Our decision to export Em Sherif was triggered by two factors: the increasing demand of potential partners to participate to the franchising of the brand, and the high brand awareness and success this brand gained among GCC citizens who visited the outlet in Beirut.

What are the main attributes that differentiate Em Sherif's concept from other restaurants on the local and regional markets?

The interior design, the set menu, the silverware, the warm welcoming and most of all the quality and taste of food are all success factors that distinguish Em Sherif from other restaurants. We are grateful that our customers appreciate the unique dining experience we always seek to offer them.

How do you perceive the Food and Beverage market in Lebanon today?

The Food and Beverage market is stagnating for some developers and deteriorating for many others. Unfortunately today only few restaurants are able to survive. Furthermore, subsidized loans are currently a must to support the operating expenses in the Food and Beverage market.

Do you have other projects that are currently underway?

We opened Em Sherif Café in Down Town Beirut in 2016 with the aim of franchising it abroad. As for our future projects, we are working on a new concept scheduled to open in the coming months in Down Town and that will serve Asian Oriental cuisine as well as hookahs on the terrace.



It is thanks to Hodema that we finally opted for the franchise model, and started considering partnerships outside Lebanon.



PROJECTS

Kye Tabarja, Lebanon

Hodema was in charge of reviewing the layouts of Kye, a beach resort in Tabarja spread over a plot of land of 200,000 sqm with 400m waterfront. Hodema participated in the concept development which includes over 700 chalets, several swimming pools, sports courts, a gym and spa as well as Food and Beverage outlets.



Four star mountain hotel Baaklin, Lebanon

Hodema is developing a turnkey four star hotel in the village of Baaklin. First, we studied the hospitality sector in the Chouf region prior to developing the venue's concept. Hodema is currently assisting the client in the project's implementation phase, and is setting up a built-in management.



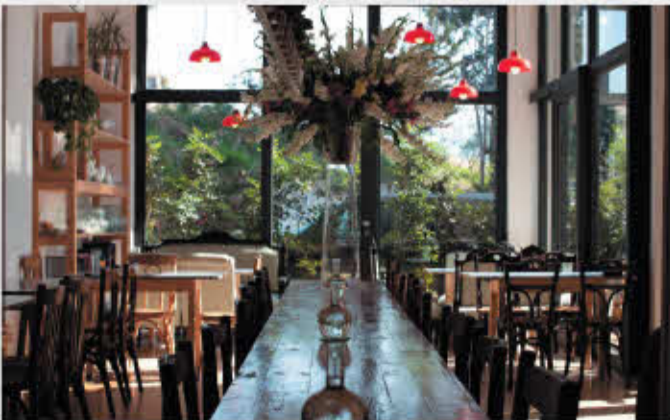
ABC Dbayeh Dbayeh, Lebanon

Hodema was appointed by ABC Group to reevaluate the Food and Beverage mix at their mall located in Dbayeh. We analyzed the mall's Food and Beverage portfolio and provided the group with recommendations to reach the optimal mix.



Tawlet Beirut, Lebanon

Hodema developed the training manuals of the restaurant "Tawlet", a "farmer's kitchen", and assisted in the brand's expansion in Lebanon.



La Siesta Khalde, Lebanon

After studying the beach resort market supply in Lebanon and creating the concept and business plan for La Siesta mixed-use project located in Khaldeh, Hodema identified potential operators to manage the property, elaborated the project's summary fact sheet and acted as the owner representative with selected international hotel operators.

Pastry and confectionary kitchen Hazmieh, Lebanon

After performing a competition analysis in the pastry industry, Hodema developed the concept and financial study for a pastry and confectionary catering kitchen, and coordinated the project's architecture, interior, graphic and kitchen designs.

ABC Verdun Beirut, Lebanon

Hodema assessed the location and surroundings of the upcoming ABC mall in Verdun, and advised the team on its Food and Beverage strategy. We also defined the mall's optimal Food and Beverage portfolio mix and type of food in the mall and inside the department store.



Food and Beverage cluster project Hazmieh-Baabda, Lebanon

Hodema evaluated the viability of a Food and Beverage cluster project in Hazmieh-Baabda spread over a plot of land of 11,000 sqm. We identified and studied the Food and Beverage clusters supply in Lebanon, and provided the client with concept guidelines along with a business plan and financial projections.

Mixed-use project Mar Takla, Lebanon

Hodema presented an overview of the furnished apartments market in Greater Beirut prior to creating the concept of a mixed-use project in Mar Takla including a furnished apartments building consisting of three floors. A business plan and financial projections were also elaborated for the project.



Bank Audi cafeteria Beirut, Lebanon

Hodema developed the concept of Bank Audi's corporate cafeteria located in M1 Building in Down Town Beirut and followed up on its implementation.

Juice Up Beirut, Lebanon

Hodema assessed "Juice Up", a concept launched in 2014 in Sodeco area and serving fresh vegetable and fruit juices as well as pancakes, croissants, and sandwiches. We elaborated the brand's operating and training manuals, and planned its franchise strategy.



Mixed-use project Ballouneh, Lebanon

Hodema was requested by the "Compagnie Immobilière Libanaise" (CIL) to evaluate the feasibility of a commercial component in its real estate project located in Ballouneh.

Syndicate of owners of restaurants, cafés, night-clubs & pastries in Lebanon Lebanon

Hodema was approached by the Syndicate of owners of restaurants, cafés, night-clubs & pastries in Lebanon to assist in the set up of its corporate structure, develop its organization chart and elaborate the board's manifesto.



Lebanese café project Beirut, Lebanon

Hodema elaborated the feasibility study of a café project in Down Town Beirut serving Lebanese cuisine and shisha.

Al Bustan Beit Mery, Lebanon

Hodema was requested by the owners of "Al Bustan" hotel in Beit Mery, Lebanon to assess the hotel's operations and premises. Hodema also provided the owners with strategic support to implement its recommendations.



Retail outlet Beirut, Lebanon

Hodema assisted "Izzat Daouk & Sons" in the creation process of "Hair Lounge", a sub-brand developed exclusively for commercial centers inside and outside Lebanon. Hodema assessed "Izzat Daouk & Sons" outlets in Hamra and Corniche El Mazraa, and provided recommendations prior to developing the brand's concept.



La Parrilla Beirut, Lebanon

Hodema was requested by the owners of "La Parrilla" grill house to create their brand's set of franchise and training manuals in order to export the concept outside Lebanon.



PROJECTS

Tavolina Beirut, Lebanon

After assisting our client in the development of Tavolina restaurant in Mar Mikhael, Hodema elaborated the brand's set of operating manuals.



Basateen Trablos Tripoli, Lebanon

Following our mission with MI Real Estate Company whereby we developed a mixed-use project spread over a plot of land of 11,000 sqm in Tripoli, Hodema was requested to assist in the leasing services of Basateen Trablos.



Mixed-use project Beirut, Lebanon

Hodema assisted in the development of the concept, the facilities programming and the financial studies of a mixed-use project in Beirut spread over a plot of land of around 100,000 sqm, by the sea.

Monitoring of Food and Beverage footfall in malls Lebanon

Hodema assessed selected Food and Beverage brands in various malls in Lebanon, and analyzed their footfall on different days of the week, in order to evaluate the performance of identified Food and Beverage outlets versus other components inside malls.

Gourmet Food and Beverage concept Beirut, Lebanon

Hodema developed the concept of a Food and Beverage outlet in Beirut focusing on gourmet salads with a seating capacity of 20 to 30 people. A business plan was also elaborated for the project.

La Rose de Sim Beirut, Lebanon

Hodema assessed the premises and operations of "La Rose de Sim", a fashion accessories retail brand located in Ashrafieh, and presented a strategy for the brand's expansion plan in Lebanon and the Middle-East.



Café-restaurant project Beirut, Lebanon

Hodema developed the concept of a day café-restaurant that will be located in central Beirut, and elaborated the project's business plan and financial projections.

Baron Beirut, Lebanon

Hodema assisted the Baron team in the creation and implementation of their flagship "neo-bistro" concept located in Mar Mikhael and serving innovative cuisine. Hodema also developed the project's financial study and bank file.



Food and Beverage project Beirut, Lebanon

Hodema performed an overview of the Food and Beverage market focusing on the French cuisine and the "Epicerie fine" supply in Lebanon, and developed the concept of a bistro including a retail corner in Beirut.

Business park corporate cafeteria Beirut, Lebanon

Hodema was requested to develop a concept for a corporate cafeteria catering to around 1000 employees and located in a business park in Jisr El Bacha. The project consists of five office buildings surrounding a common area of approximately 1,300 sqm.

La Maison de la Forêt Bkassine, Lebanon

Hodema was appointed by "La Maison de la Forêt" in Bkassine to review the venue's initial concept and components, define the concept of the project's extension and elaborate its financial study. Hodema assisted the client in the implementation phase.



Secrets Beirut, Lebanon

Hodema assessed "Secrets" pastry and creamery shop's three outlets locations and central kitchen, a mission required by the client prior to expanding his brand in the country. Hodema also elaborated the brand's set of operating manuals.



Beit Misk country club Metn, Lebanon

Hodema was requested by the owners of Beit Misk country club to assess its architectural plans in order to optimize the operations of its clubhouse. The project is spread over a surface of approximately 2,800 sqm and consists of a health club, Food and Beverage outlets, swimming pools and other facilities.



Fast casual Food and Beverage project

Beirut, Lebanon

Hodema performed a market study on the fast casual Food and Beverage industry in Beirut, and developed the concept and business plan of a flagship fast casual dough-based project.

Orchidée Maison du Chocolat

Tripoli, Lebanon

Hodema assessed the premises and operations of Orchidée, a chocolate and pastry shop in Tripoli, and provided a set of recommendations, prior to elaborating the brand's set of operating manuals.



5 a day the shop Beirut, Lebanon

Hodema defined the concept guidelines and elaborated the business plan and financial projections for a Food and Beverage project in Lebanon serving healthy grab-and-go sandwiches, salads and soups along with juices.

Mist hotel and spa Ehden, Lebanon

Hodema performed an overview of the mountain hotels and Food and Beverage market in Ehden and the Cedars region. The project consists of 60 rooms, 25 chalets for rental, two meeting rooms, three restaurants, two swimming pools, a spa, a gym as well as a kids' area.



Maison Samira Maatouk Beirut, Lebanon

Hodema reviewed the concept of "Maison Samira Maatouk", a coffee house in Verdun, and elaborated the brand's set of franchise manuals.



Food and Beverage cluster Tyre, Lebanon

Hodema is currently developing a Food and Beverage cluster spread over a plot of land of 3,000 sqm in Tyre. We first assessed the project's location, studied the Food and Beverage market in Tyre, created the concept and the tenant mix, and elaborated the cluster's business plan.



Interview: Samer Zayat

Managing Partner of Crown Concepts Group



Samer Zayat was born and raised in Beirut, Lebanon. After high school, he enrolled at the Lebanese American University where he earned a Business Management degree. Zayat's entrepreneurial spirit emerged when he was eighteen years old and launched his first company, a small clothing business with a startup capital of 300 USD. Five years and one million dollars of revenue later, Zayat had gained invaluable entrepreneurial experience along the way. He then moved to Dubai, UAR to become the Founder and Managing Partner at Crown Capital Investments, an investment company active in a number of businesses across several sectors, and headquartered in Dubai.

Passionate for food, Zayat began to show interest in the Hospitality industry. Crown Concepts was founded to venture into the restaurant business. Driven by concept innovation, Crown Concepts invested heavily into research and development seeking to introduce unique concepts offering fantastic cuisines to meet modern day market expectations.

Shortly after opening, Logma Restaurant became a reference in the modernized Emirati and Khaleeji cuisine restaurants in Dubai. With innovation, keen business strategy, aggressive business tactics, and aspirations to open multiple restaurants, Zayat intends to expand not only his culinary expertise, but also his business ventures.

As Managing Partner of Crown Concepts, why did you decide to venture in the Food and Beverage sector?

Crown Concepts Group is the hospitality subsidiary of Crown Capital Investments "CCI". CCI aims to earn sustainable and attractive returns for shareholders and investment partners by managing and deploying capital in areas where the company sees an opportunity that can add value to its long term strategic vision. We identified the Food and Beverage sector as one of the key promising industries for investment, yet we understood the fact that this is one of the most challenging industries to penetrate. I strongly believed that I could capitalize on my entrepreneurial skills in this sector thus embraced the challenge, and began with the development of Logma.

How can you describe the concept of Logma?

Logma- لقمة [Arabic for "mouthful"] is a generous invitation to bite into the UAE and Khaleeji delicious culinary treasures in a friendly and authentic ambience that mirrors Dubai's flair in combining the traditional with the contemporary. Dubai's success story as a world leader in modernization has earned the city great international distinction, but the rich and delicious Emirati/ Khaleeji cuisine remains unknown to many. Logma is all about changing that.

Where did the idea of creating Logma come from?

Our story is born out of our desire to share with the world the rich Emirati and Khaleeji cuisine. It is our own way of keeping the taste of tradition alive and enrolling an educational role in promoting this cuisine and making it more accessible and casual to the locals, expats and tourists while exposing it in an urbanized setting. Logma has been developed to position the Khaleeji cuisine on the local and international food scene, and that is exactly what we did. We are proud to have developed a Dubai-born Khaleeji concept up to the highest standards in the UAE restaurant industry. Most importantly we have a vital role in educating the world about what the Khaleeji cuisine is, in a fun, hip, and trendy way.

Who is your target clientele?

We target a wide range of clients- local citizens, expatriates and tourists- seeking a traditional yet modernized offering of the Khaleeji cuisine.

How did Hodema assist you in the development of the project?

Hodema played a vital role in the development of Logma which was the first venture of Crown Concepts in the Food and Beverage industry. Our vision was clear, however we needed guidance in various aspects of the project's development. This is where Hodema came in to share their knowledge, expertise and make sure that our venture was a successful one. The Hodema team is very diverse, experienced, and professional; their consultants treated our project as theirs from day one. We owe them a big part of what Logma has become today.

How do you describe the Food and Beverage market in Dubai, and how do you perceive its evolution in the next five years?

The food and beverage industry in Dubai is thriving at the moment and will continue to do so for the foreseeable future. Despite the aggressive expansion of restaurants and cafes in recent years, the market remains a sustainable one. It is expected to add about 1,600 Food and Beverage outlets within the next five years with an average growth of 4 percent per year mainly due to the rapidly rising tourism sector. Dubai is ranked as one of the top destinations for international travelers. We perceive that the market will continue to grow and will be more favorable to the concepts that are properly developed, as the end consumer has become very knowledgeable of quality, service, and premium restaurant standards.

What are your future projects in the Food and Beverage sector?

Crown Concepts has a promising developmental plan within the UAE, GCC, and international markets with strong interests in establishing, managing and franchising a portfolio of restaurants.



The Hodema team is very diverse, experienced, and professional. We owe them a big part of what Logma has become today.

PROJECTS

Zyara

Dubai, United Arab Emirates

Hodema assessed "Zyara" restaurants in Dubai and Abu Dhabi, and elaborated the brand's operating manuals. Hodema also assisted in "Zyara"'s expansion outside the UAE.



Sweet & Sassy

Kingdom of Saudi Arabia

Hodema performed a market study of the retail industry for "twens" in the Kingdom of Saudi Arabia. Our task was to adapt the American franchise "Sweet & Sassy" to the local market, and to elaborate a business plan and financial projections for the project.

Grand Central

Abu Dhabi, United Arab Emirates

Hodema was appointed by "Grand Central", a burger joint concept in UAE, to assess its outlets located in Abu Dhabi and Al Ain and provide a set of recommendations to boost its performance.

Casual Food & Beverage outlet

Dubai, United Arab Emirates

Hodema analyzed the Food and Beverage supply in Dubai prior to developing a casual Food and Beverage project focusing on Foul, Fatteh and Hummus. Hodema defined the concept and elaborated the project's business plan and financial projections.

Mince

Cairo, Egypt

Hodema assessed "Mince" burger joint in Cairo prior to expanding the brand inside and outside Egypt, and elaborated its set of franchise manuals.



Piedays

Riyadh, Kingdom of Saudi Arabia

Hodema developed a pie concept in Riyadh, and coordinated the project's architecture, interior and graphic designs.



Kaena Holding

Jeddah, Kingdom of Saudi Arabia

Hodema was appointed by Kaena Holding based in Jeddah, to develop the company's corporate manuals and organizational structure.

Kava & Chai

Dubai, United Arab Emirates

Hodema is in charge of the turnkey development of Kava & Chai brand in and outside the UAE. Hodema studied the coffee shops market in Dubai and supply in London prior to developing a concept for a coffee shop chain with the flagship opening in Sharjah. Hodema presented a business plan for the implementation of the chain, and is mandated to develop the brand's franchise manuals.

Catering company

Al-Khobar, Saudi Arabia

Hodema performed a market study of the catering business in Riyadh and Eastern Province prior to creating a concept for a catering company in Al-Khobar. We elaborated a business plan and financial projections for the project, and assisted the client in the implementation phase.

Mori Sushi

Cairo, Egypt

Hodema assessed "Mori Sushi", a Japanese restaurant currently operating 14 outlets in Egypt, prior to expanding the brand outside the country. Hodema elaborated its set of franchise manuals and developed the brand's expansion strategy.



Quick Service Restaurant

Dubai, United Arab Emirates

Hodema performed an overview of the Quick Service Restaurant market in Dubai prior to developing a rice-based Food and Beverage chain in Dubai. A detailed business plan was also elaborated for the project.

Bite Me

Riyadh, Saudi Arabia

Hodema assessed "Bite Me", a sandwich delivery concept in Riyadh with the aim to expand the brand in the Kingdom of Saudi Arabia. Hodema also elaborated the brand's set of operating manuals.

Coffee shop and business center

Jeddah, Kingdom of Saudi Arabia

Hodema performed an overview of the Food and Beverage market in Jeddah prior to developing a "café and business hub" project along with a comprehensive business plan.

Tamara

Cairo, Egypt

Hodema assessed "Tamara", a Lebanese bistro in Cairo prior to franchising the brand. At a later stage, Hodema elaborated "Tamara" set of franchise manuals and planned its strategic development inside and outside the country.



Italian and Lebanese Food and Beverage outlets

Jeddah, Kingdom of Saudi Arabia

Hodema was approached by Al-Kholi Group in Jeddah to analyze the Food and Beverage market in Jeddah prior to venturing into a Food and Beverage business in KSA. Hodema then completed the feasibility study for the implementation of an Italian homegrown chain and a Lebanese Food and Beverage franchise to be launched in the kingdom.

Afiyet Olsun

Dubai, United Arab Emirates

Hodema assessed "Afiyet Olsun", a Turkish restaurant in Dubai, and provided recommendations to optimize its operations.



Barista coffee shop

Jeddah, Kingdom of Saudi Arabia

Hodema was requested to create a coffee shop concept in Jeddah with the aim to develop it into a chain operating in Lebanon and the region. Hodema developed the concept, and elaborated the business plan and financial projections and assisted in the coffee shop's implementation phase.



Panos

Dubai, United Arab Emirates

Hodema performed a market study of the Food and Beverage industry in Dubai in order to properly advise its client on the acquisition of the Belgian brand "Panos". Hodema adapted the concept to the UAE market, and elaborated the project's financial study for the development of the brand in the UAE.

Date and date confectionary retail project

Kingdom of Saudi Arabia

Hodema studied and analyzed the date confectionary retail market in KSA, and identified the investment opportunities in this segment in the kingdom.

Industrial bakery

Jeddah, Kingdom of Saudi Arabia

Hodema developed a concept for an industrial bakery in Jeddah after studying the competition in the city. Hodema advised the client to open a retail shop, and elaborated the bakery's feasibility study.

Criollo Chocolate

Jeddah, Kingdom of Saudi Arabia

Hodema assessed "Criollo Chocolate Café" in Jeddah prior to its expansion in KSA. Hodema also elaborated the brand's set of operating and training manuals.



PROJECTS

Cheeburger **Riyadh, Kingdom of Saudi Arabia**

Hodema studied the burger supply in Riyadh's Food and Beverage areas, and assessed the concept and location of Cheeburger, a US burger chain. Hodema was in charge of adapting the concept to KSA and UAE markets, coordinated the architecture, interior and graphic designs, assisted in the selection of the management team and in the menu engineering.



Café Liwan **Kingdom of Saudi Arabia**

Hodema was approached by the owners of Café Liwan, a coffee shop established in 2007 and currently operating over 10 outlets in Eastern Province and Riyadh, to analyze the competition and develop a business plan including a new pricing strategy.



Figaro's Pizza **Abu Dhabi, United Arab Emirates**

Hodema completed a market study on the pizzerias supply and demand in the UAE, developed a business plan and assessed all Figaro's Pizza outlets in the country in order to elaborate strategic recommendations for the development of the brand across the UAE.



Yamanote Atelier **Dubai, United Arab Emirates**

Hodema assessed "Yamanote Atelier", a Japanese bakery and café in Dubai, and elaborated its set of franchise manuals. Hodema also assisted the owners in the brand's expansion plan outside the UAE.



Coffee shop **Riyadh, Kingdom of Saudi Arabia**

Hodema studied the coffee shops supply in Riyadh's Food and Beverage market in order to develop the concept of a coffee shop in the city. A business plan and financial projections were elaborated for the flagship outlet.

Gourmade **Jeddah, Kingdom of Saudi Arabia**

Hodema was requested to assist in the concept creation of Gourmade sandwich outlet in Jeddah. We presented a business plan for the project's development and are currently undertaking the implementation phase. Hodema is also handling the menu development.



Sachi **Cairo, Egypt**

Hodema assessed "Sachi" restaurant in Cairo, and provided a set of recommendations prior to elaborating the brand's set of operating manuals.



Theatre Hall **Cairo, Egypt**

Hodema elaborated the feasibility study of a theatre hall mixing entertainment and Food and Beverage.

Quick Service Restaurant **Jeddah, Kingdom of Saudi Arabia**

Hodema studied the Quick Service Restaurant market in Jeddah in order to develop a chicken-based concept in the city. Hodema elaborated the project's financial study and planned the brand's expansion strategy in KSA.

Taza de Sopa **Riyadh, Kingdom of Saudi Arabia**

Hodema performed an overview of the Food and Beverage market in Riyadh, developed a soup-based concept, and presented a detailed feasibility study and financial projections for the flagship outlet.

Healthy Food and Beverage project **Riyadh, Kingdom of Saudi Arabia**

Hodema performed a market study of the Food and Beverage industry in Riyadh prior to developing a healthy Food and Beverage outlet in the city. Hodema created the concept and presented a detailed financial study.

Let's Go gym **Abu Dhabi, United Arab Emirates**

Hodema performed a market study of the health and fitness industry in the UAE prior to developing a concept for a health and fitness club in Abu Dhabi. A business plan was also presented to the client. Hodema is currently assisting in the project's development phase.

Khaneen **Kuwait, Kuwait**

Hodema performed an assessment on "Khaneen" restaurant's premises and operations in Kuwait prior to elaborating the brand's set of operating manuals.



Restaurant-café **Dubai, United Arab Emirates**

Hodema developed the concept of a restaurant-café in Dubai serving traditional Levantine cuisine. A business plan and financial projections were also elaborated for the project.

Furnished apartments project **Jeddah, Kingdom of Saudi Arabia**

Hodema analyzed the furnished serviced apartments market in Jeddah and assessed the client's location in order to set the ground for the development of a 2 to 3-star furnished serviced apartments project in the city.

Lebanese Quick Service Restaurant project **Al-Khobar, Kingdom of Saudi Arabia**

Hodema performed a market study in KSA with a focus on Lebanese Quick Service Restaurants, prior to developing a Lebanese Food and Beverage concept in Al-Khobar, along with a business plan and financial projections. Hodema then assisted in the outlet's development phase.

Fairs & Exhibitions

Gulfood 2014 - 2015 Dubai, United Arab Emirates

Hodema participated two years in a row in Gulfood, an exhibition gathering 5,000 participants from 120 countries. The event took place at the Dubai World Trade Center in February 2014 and 2015. This annual tradeshow presents the latest trends and innovations in the food and beverage sectors including foodservice and hospitality equipment in the United Arab Emirates.



Horeca Kuwait 2015 Kuwait, Kuwait

Hodema team visited Horeca show in Kuwait which took place in January 2015 in Kuwait City. This event covered the hospitality, catering and food industry sectors in the country and the region.



Saudi Horeca 2014, 2015 and 2016 Riyadh, Kingdom of Saudi Arabia

Hodema participated in Saudi Horeca, the Saudi International food, beverage and hospitality exhibition which took place in November 2014, October 2015 and November 2016 at the Riyadh International Convention & Exhibition Center. This annual event gathered more than 70 exhibitors among which food processing, packaging industries, meat and poultry, bakery and dairy companies.



Horeca 2014, 2015 and 2016 Beirut, Lebanon

For the 12th consecutive year, Hodema participated in Horeca, the annual hospitality and food exhibition which took place at Biel in April 2014, 2015 and 2016. The trade show gathers over 250 companies in the Food and Beverage sectors, among which catering equipment, packaging, hygiene, pastry and bakery, food, beverage, and consultancy, as well as international pavilions. In the 2016's edition, Hodema organized the Annual Hospitality Forum (AHF) in collaboration with Hospitality Services which gathered key players of the hospitality industry and tackled topics related to franchise, hotels and Lebanese cuisine.



Interview on Al Arabiya TV during GRIF 2015 Dubai, United Arab Emirates

Hodema's managing partner Nagi Morkos was interviewed on Al Arabiya News Channel on February 17th, 2015 during the Global Restaurant Investment Forum (GRIF) in Dubai. Morkos tackled the franchise business and discussed the opportunities of buying a franchise versus developing new Food and Beverage concepts as well as the challenges faced by the franchisees, among other topics.



GRIF 2014, 2015 and 2016 Dubai, United Arab Emirates

Hodema participated three years in a row as Gold sponsor, speaker and moderator in the Global Restaurant Investment Forum (GRIF) which took place in March 2014, February 2015 and March 2016. Hosted by Bench Events, this annual trade show gathers investors, hoteliers, Food and Beverage brands owners, franchisors, franchisees, suppliers and other key industry professionals across the region. The GRIF conference programme includes over 50 industry leaders, expert speakers and moderators who lead debates and share business knowledge on topics such as Food and Beverage openings, trends worldwide, macro-economics, latest global concepts and brands to look out for in the future.



Hodema at a Live TV interview on Saudi2 channel 2015 Riyadh, Kingdom of Saudi Arabia

Hodema's partners Nada Alameddine and Toufic Akl took part in "Saudi Morning" live show broadcasted on Saudi2 channel TV on October 20th, 2015 during Saudi Horeca. They presented Hodema's services and tackled the Food and Beverage industry in KSA and in the region.



Salon du chocolat 2014, 2015 and 2016 Beirut, Lebanon

Hodema team attended "Salon du Chocolat" and "Beirut Cooking Festival" which took place in November 2014, 2015 and 2016 at Biel in Lebanon. This show presents several events such as chocolate gourmet workshops with more than 20 pastry chefs and over 50 exhibitors gathered in celebration of chocolate, in addition to the renowned chocolate Fashion Show with famous pastry chefs and designers.



Interview on Sky News Arabia during GRIF 2016 Dubai, United Arab Emirates

Hodema's partner Nada Alameddine was interviewed on Sky News Arabia on March 15th, 2016 during the Global Restaurant Investment Forum (GRIF) in Dubai providing facts and figures about the Food and Beverage industry as well as the supply chain especially in the Kingdom of Saudi Arabia and the United Arab Emirates.



Bifex 2014, 2015 and 2016 Beirut, Lebanon

Hodema attended the Beirut International Franchise Forum and Exhibition (BIFEX) in April 2014 and May 2015 at Phoenicia Hotel, and May 2016 at Biel, Lebanon.



SIAL Middle East 2015 Abu Dhabi, United Arab Emirates

Hodema team visited SIAL Middle East in December 2015 at Abu Dhabi National Exhibition Centre. This show gives the opportunity to meet with key Food and Beverage buyers from the Middle East, North Africa and India.



Hodema Internal Events

Hodema consulting services celebrates 10 years of success-2014

Beirut, Lebanon

Hodema organized a dinner at La Table d'Alfred on December 10th, 2014 to celebrate the company's 10th anniversary. A welcome drink was held during the event to greet the guests among which His Excellency Mr. Michel Pharaon, former Minister of Tourism, Mr. Tony Ramy, President of the Syndicate of Owners of Restaurants, Cafés, Night-clubs and Pastries in Lebanon, Mrs. Joumana Damous Salame, Managing Director of Hospitality Services, Mrs. Sibylle Rizk, Editor-in-chief of Le Commerce du Levant, Mr. Walid Raphael, CEO of Banque Libano-Française, as well as the company's collaborators and team. During the dinner, managing partner Nagi Morkos thanked the guests for sharing this special occasion with Hodema and for their continuous support throughout these ten years: "Hodema's 10th anniversary is a tremendous milestone for the company. We were far from imagining that our small structure would go all that way. But it did: within a decade, Hodema team grew from two to twenty multilingual consultants, with a strong background in hospitality, leisure, tourism, retail and real estate along with high-profile academic degrees. Thanks to the varied experiences of Hodema managers, consultants and analysts, our company has become a reference in the regional market: in a 10-year timeframe, we have created, implemented or franchised over 300 projects, many of which valued over US \$100 million. Today, Hodema is active in up to 16 countries; it advises large scale corporations in Lebanon, the Middle East and Africa, and has established solid partnerships with its customers. We set the bar only by what we believe defines greatness. I am proud to be leading a team of people who strive for perfection every day and persistently work to deliver an incredible service to our customers to best suit their needs."



Get together 2016

Bkassine, Lebanon

Hodema organized a team building day at La Maison de la Forêt in Bkassine on October 28th, 2016 which included a workshop, a lunch and acrobatic activities in the forest.



Marathon 2015

Beirut, Lebanon

As part of its corporate social responsibility initiative, Hodema participated in the 2015 Beirut Marathon that was held on Sunday November 8th. 13 team members of Hodema took part in the 10 km run for fun race. Proceeds of this event went to the Children's Cancer Center organization in Lebanon.



Hodema internal workshop 2015

Beit Mery, Lebanon

In the scope of its continuous growth, Hodema organized an internal workshop on May 7th, 2015 at Al Bustan hotel in Beit Mery. The aim of the gathering was to evaluate the company's evolution, and discuss future expansion and improvement. A dinner was held the night before at Mayrig restaurant in Gemmayzeh.



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News & Events

Live love Lebanon campaign – Kalam Ennas episode 2014

Beirut, Lebanon

Managing partner Nagi Morkos participated in Kalam Ennas episode that was broadcasted on May 18th, 2014 on LBCI live from Zaitunay Bay in Beirut. This episode, hosted by Mr. Marcel Ghanem and His Excellency Mr. Michel Pharaon, former Minister of Tourism to promote "Live Love Lebanon" campaign, gathered various key players of the tourism industry.



Hodema, guest speaker at Balamand University 2014 Koura, Lebanon

Hodema was invited to be a guest speaker at the School of Tourism and Hotel Management at the University of Balamand in Koura on December 9th, 2014 to share its professional experience and insights about the hospitality and tourism industry in Lebanon and the Gulf region with the students and faculty members. A 60-minute session hosted by Nagi Morkos, Nada Alameddine and Toufic Akl from Hodema, tackled the challenges and trends of the food and beverage industry in Lebanon as well as the keys to open a successful restaurant.



Small and Medium Enterprises strategy launching 2014

Beirut, Lebanon

Managing partner Nagi Morkos represented the former Minister of Tourism His Excellency Mr. Michel Pharaon during the launching of the Small and Medium Enterprises (SMEs) strategy in Lebanon, which took place on December 16th, 2014 at the Grand Serail in Beirut.



Hodema, sponsor of Avant Premiere movie "From Bombay to Paris: The Hundred-Foot Journey" 2014

Beirut, Lebanon

Hodema sponsored the Avant Premiere movie "From Bombay to Paris: The Hundred-Foot Journey" which took place on August 26th, 2014 at Beirut Souks Cinemacity. The event gathered several Food and Beverage key players in Lebanon, as well as renowned architects, brand builders and journalists.



Women round table 2015

Beirut, Lebanon

Hodema's partner Nada Alameddine moderated the women's leadership round table that was organized by Hospitality Services on November 18th, 2015 in Beirut. The round table gathered several General Managers of renowned hotels in Beirut and discussed their thoughts, motivations, struggles and insights of the current situation in Lebanon.



Special issues on Beirut Food and Beverage market 2014, 2015 and 2016

Beirut, Lebanon

For the 7th consecutive year, Hodema authored and published special issues on Beirut Food and Beverage market, in collaboration with the Lebanese economic magazine "Le Commerce du Levant". The three issues 2014, 2015 and 2016 covered the main Food and Beverage trends, landmarks and zones in the city. The 2014 edition presented the major suppliers in the Food and Beverage industry, whereas the catering company owners were the main focus in 2015. The 2016's edition tackled the key actors of the Lebanese traditional cuisine.



Lebanon rural tourism strategy 2015

Beirut, Lebanon

Hodema team attended the "Rural Tourism Strategy for Lebanon", a new initiative launched by the Ministry of Tourism on February 11th, 2015 at the Grand Serail under the patronage of his Excellency former Lebanese Prime Minister Tamam Salam.



Lecture at Sagesse University 2016

Beirut, Lebanon

Hodema's partners Nagi Morkos, Nada Alameddine and Toufic Akl were invited to be guest speakers at Sagesse University in Ashrafieh, Lebanon on April 25th, 2016. They gave the students of the Hospitality Management faculty a lecture about the hospitality industry in Lebanon and the Middle East region.



Interview on Sky News Arabia 2016

Beirut, Lebanon

Hodema's partner Nada Alameddine was interviewed on Sky News Arabia on May 9th, 2016 at their studios in Beirut to discuss the restaurants and cafés industry in the Middle East with a special focus on Kuwait, and to highlight the latest Food and Beverage trends in the region.



Food safety round table 2014

Beirut, Lebanon

Nagi Morkos, managing partner at Hodema, moderated a round table on food safety on December 4th, 2014 at Hospitality Services offices in Beirut, gathering restaurateurs and health professionals. In the wake of the "food scandal" that has plagued Lebanon, the participants discussed their individual challenges and presented advices and solutions.



Jury in Alba University 2015

Beirut, Lebanon

Hodema's managing partner Nagi Morkos was invited by ALBA University on July 9th, 2015 to be part of the jury and grade the students specializing in Product design on their project which topic was: "Do | Eat: le produit autour de la préparation, présentation et consommation de la nourriture".



Beirut Restaurants Festival 2016

Beirut, Lebanon

Hodema participated in Beirut Restaurants Festival that took place in September 2016 in Mar-Mikhael. Hosted by the Syndicate of Owners of Restaurants, Cafés, Night-Clubs & Pastries in Lebanon, this event was organized to celebrate Beirut crowning as the Best International City for Food in the world, and included casual dining, pastry, fast food, cafés and food trucks.



Women round table 2016

Beirut, Lebanon

Hodema's partner Nada Alameddine moderated the women entrepreneurs' round table that was organized by Hospitality Services on January 11th, 2016 in Beirut gathering several Lebanese women pioneers in the Food and Beverage industry.



Hodema Best of Instagram Pictures



Market Insight



Le Mall Dbayeh, Lebanon

Eating at the mall

December 2014/January 2015

This article was published in "Hospitality News" - N°97, December 2014/January 2015 by Nagi Morkos from Hodema

The US-inspired mall trend has spread globally in the last decade, and it doesn't seem to be running out of steam. What's relatively new, though, is the leading role that the food and beverage (F&B) industry now plays in the "commercial center" business. For a while, coffee shops and restaurants in malls were considered by consumers as a way to take a quick break between shopping sessions. Nowadays, some F&B outlets (in malls) have become sole destinations in their own right, with shopping activities being considered a side line rather than the main reason for visiting a mall.



ABC Ashrafieh, Lebanon

A new destination

In Lebanon, the Lebanese have jumped on the bandwagon of the mall trend. Seven major malls have opened in the last few years in Beirut, Dbayeh, Sin el Fil and Saida, with a further glut of large complexes sprouting nationwide. Added to this are several new projects in the pipeline, thumping their nose at the economic downturn and the political instability. Various reasons can explain this popularity. The concept of malls is typically American and the Lebanese are shifting towards mall culture. Also, in urban areas where parking lots are hard to find, malls have become a convenient alternative for outings, attracting large families and groups of friends. The restaurant offering has thus taken a larger piece of the pie in the mall business, with a varied panel of outlets. In terms of footfall, F&B offerings benefit from a captive clientele who come to shop and from the mall employees themselves, who use the outlets for their meal breaks. In terms of visibility, malls enable new brands to be exposed, and help already popular places to become destinations. Another upside is that "mall strollers" are likely to eat at any time of the day, extending service hours and profits.

Beirut City Center, opened on the southern outskirts of the capital, is to date the darling of F&B investors, with 33 outlets, out of the 87 located in Beirut's malls. It is closely

followed by CityMall with its food court. As for Le Mall in Dbayeh, just north of Beirut, this has the largest ratio of gross leasable area (GLA) dedicated to F&B, although it is one of the smallest malls in terms of total size.

Depending on their location, thus their target clientele, Lebanese malls favor either lower or higher-end outlets. ABC malls in Beirut's Ashrafieh and northern suburb, Dbayeh, being positioned in the upper market with a variety of luxury retail brands, offer the largest number of mid-end F&B outlets. Beirut City Center and CityMall's strategy is slightly different: they are the only malls with a food court positioned in the low-end, quickservice outlets representing respectively 46 and 43 percent of their F&B portfolio, which mainly targets families and focuses on kids' entertainment facilities. Le Mall Dbayeh has almost the same ratio of low and mid-end F&B brands. Despite the difference in positioning, Lebanese malls offer a diversified mix of F&B concepts that respond to the various needs of their customers.

Lebanese malls favor American cuisine, mostly present in Beirut City Center in 46 percent of the outlets. ABC Ashrafieh and Dbayeh, where positioning is slightly higher, have a larger number of restaurants serving European cuisine. In general, different international cuisines take the lead in all the country's malls, leaving limited space for Middle Eastern cuisine, which currently remains poorly represented. On the other hand, pan-Asian cuisine is gaining popularity in malls. However it is still dominated by the sushi offering.

Although most of the F&B concepts in malls are created locally, we recently witnessed the arrival of a growing number of international brands – mainly fast-food – on the market with the opening of Beirut City Center. However, Le Mall Dbayeh yields the largest number of Lebanese grown concepts, with 70 percent of its F&B mix, followed hot on the heels by ABC Ashrafieh and Dbayeh with almost 60 percent each.



The Avenues Mall, Kuwait

The Gulf fad for malls

The reason why F&B outlets in malls have become the new eating destination in Lebanon, and the Lebanese are still hungry for more, can be found in the Gulf. The mall trend has been going strong there for a long time now, which has given time for investors to try and test out F&B concepts. In Saudi Arabia and Qatar, restaurants that are located in

malls have overtaken clusters and streets outlets. Doha is home to 11 malls in which 261 F&B outlets are operating, mostly low-end quick service restaurants, with 70 percent of imported brands, which are mainly American. City Center Doha gathers the highest number with 53 F&B outlets. However, local food is not served in the malls, and only 3.8 percent of concepts offer oriental cuisine. Looking upstream, Qatar has five mall and commercial center projects in the pipeline.

Dubai is also a major player on the "mall field": out of its 1039 total identified number of F&B outlets, 604 are located inside malls. In Kuwait, Avenues Mall has the largest GLA that is dedicated to F&B (23 percent of its total GLA) with 179 outlets.

Oman is the only country in the region where street restaurants and snack outlets put up strong resistance: only 30.8 percent of the F&B offering there is located in malls.

F&B clusters

Born in the USA, F&B clusters which consist of restaurants have only recently emerged and found a growing fan base. The development of food clusters is explained by the fact that they are an attractive alternative for both F&B tenants and property owners. F&B tenants share some of the costs such as valet parking, the cleaning of common areas, and marketing expenses, to promote the entire cluster. Some of the clusters include entertainment activities for children in order to attract more families. The smaller size of their structure enables them to open in central areas, unlike malls. This formula seems to pay for real estate developers, who lease empty complexes without having to manage them.

Beirut has seen many of these clusters flourishing in the last months: Verdun 1341, Junction 5 and Blueberry Square in Dbayeh, 1866 Tower and Suites in Bliss Street, and the Courtyard in Hamra. More projects are in store, especially in the capital's suburbs of Antelias and Hazmieh.

The main shortcoming, which explains why malls are still a step ahead, is the mix of leisure, retail and F&B activities that they offer. Food clusters are definitely catching up with malls, but for now, mall restaurants are still keeping consumers hungry for more.



Dubai Mall, United Arab Emirates