HODEMA MARKET INSIGHT

Beirut F&B report 2026

Beirut's F&B Sector 2026

Saturated or Sustained? The New Reality of Beirut's F&B Sector in 2025

Lebanon's Food & Beverage (F&B) sector has once again demonstrated its remarkable resilience in 2025. After years of economic turmoil, political uncertainty, currency devaluation, social unrest, and security challenges, the industry continues to reinvent itself and find new avenues for growth. While many sectors of the Lebanese economy remain under pressure, the F&B market continues to stand out as one of the country's most dynamic industries, driven by entrepreneurship, consumer demand, and investors' continued belief in Lebanon's ability to remain a regional culinary destination.

For 17 years, Hodema has monitored the evolution of Beirut's F&B landscape through detailed field surveys and market analysis. Since 2010, Hodema has surveyed and analyzed restaurants, cafés, bars, coffee shops, bakeries, snacks, kiosks, and nightlife venues across Beirut's most prominent F&B districts. The resulting report has become one of the industry's most anticipated references, providing operators, investors, landlords, developers, and industry stakeholders with a comprehensive overview of the market's performance and direction.

For the 2025-2026 edition, data collection was conducted between January and February 2026 and reflects market conditions at the time of the survey. The findings, therefore, illustrate the evolution of the F&B sector up to the period preceding the 2026 war in Lebanon and do not account for any subsequent market changes, closures, relocations, or new openings that may have occurred thereafter.

Wissam Beydoun, *Re-Imagining Beirut*. 24×31cm, mixed media on paper, private collection

This year's study marks an important evolution in the methodology. In addition to the traditional Beirut districts covered by Hodema, two new zones were officially added to the analysis: Saifi Village, previously included within Downtown Beirut, and Furn el Hayek, historically grouped with the broader Monnot-Sodeco area. Both districts have gradually developed distinct identities as F&B destinations to justify independent analysis.

Furthermore, Hodema expanded its coverage beyond Beirut by incorporating the Northern suburbs, focusing on Naccache, Dbayeh, and part of Antelias area into the study. Over the past few years, investors and operators have increasingly looked beyond the capital in search of new opportunities, contributing to the emergence of strong suburban F&B clusters capable of complementing—and in some cases competing with—Beirut's traditional F&B districts.

The 2025 edition, covering Beirut's F&B landscape between July 2024 and March 2025, was completed but ultimately not published.
This report therefore constitutes the 2026 edition, covering the subsequent period from March 2025 to February 2026.


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These findings reveal a sector that continues to expand at an impressive pace. Across Beirut's thirteen surveyed zones, approximately 1,000 operating outlets were identified in 2025–2026, compared with 837 outlets across eleven zones in 2024–2025 and 810 outlets across eleven zones in 2023–2024. This represents a 19.5% increase compared with the previous year.

A total of 189 new outlets opened across the thirteen surveyed Beirut zones during the period under review, while 85 establishments ceased operations. The resulting net increase of 104 outlets demonstrates that despite increasing competition and recurrent instabilities, the sector remains attractive to both new and existing investors and operators. The figures also reveal a highly dynamic market: for every outlet that closed during the survey period, more than two new concepts opened. While this reflects strong entrepreneurial activity and investor confidence, it also highlights the increasingly competitive nature of the sector, where concept turnover remains significant.

The growth recorded over the past two years confirms Beirut's resilience.

The growth recorded over the past two years confirms Beirut's resilience. Several districts have now exceeded their pre-crisis outlet counts, while others continue to narrow the gap. The capital's F&B sector is therefore no longer merely rebuilding; it is increasingly entering a new phase of expansion characterized by new concepts and new operators.

The figures also reveal a broader phenomenon currently taking place within Lebanon's economy. Large amounts of liquidity remain available in the market, and many individuals continue to view food and beverage as one of the most accessible investment sectors.

This renewed investment appetite has been further reinforced by the formation of a new government in 2025. While many challenges remain unresolved, the relative improvement in the market's perception observed during the survey period contributed to increased investor confidence and an acceleration in project announcements and site acquisitions.

Yet, this rapid growth raises questions about long-term viability: how much more can Beirut absorb? The Restaurant category continues to dominate Beirut's F&B landscape, accounting for 27% of all operating outlets. New concepts continue to emerge across every district, ranging from neighborhood cafés and specialty coffee shops to upscale restaurants, bakery cafés, experiential concepts, and nightlife destinations. The pace of openings remains strong, yet competition has never been fiercer.

This reality was highlighted by Tony Ramy, President of the Syndicate of Owners of Restaurants, Cafés, Night-Clubs, and Pastries in Lebanon, who praised the F&B sector's unique capacity to adapt to ongoing economic, political, and security challenges: "As Syndicate of Owners of Restaurants, Cafés, Night-Clubs and Pastries in Lebanon, we've witnessed firsthand how this industry, despite everything it has endured, has shown an extraordinary ability to adapt, survive, and even thrive. Throughout every crisis, restaurants have kept their doors open, their teams motivated, and their presence felt— all of which are reflected in this year's report."

Nevertheless, Ramy cautioned against viewing the sector's growth as a guarantee of success: "Opening a restaurant today is no longer a matter of passion or hobby alone. It's a profession. It requires planning, structure, and a serious feasibility study. The hard truth is that for every ten restaurants that open, seven will likely close. This is a loss not just for the business owners, but for Lebanon's image, for our culinary identity, and for the vibrant diversity we've built over decades."

While the statement may appear severe, it reflects a reality increasingly observed across the market. The number of closures remains significant, with 85 outlets shutting down during the survey period. While demand remains strong and investor confidence has improved, success is far from guaranteed. In addition, Ramy praised Hodema's contribution to the industry and its role in helping investors navigate an increasingly competitive market:

"Hodema has become more than just a consulting firm — it is a reference, a compass, and a partner to Lebanon's hospitality industry. Hodema continues to guide investors, operators, and entrepreneurs with reliable data, sharp analysis, and strategic foresight. Its annual reports are anticipated by the entire industry, not only for their accuracy but for their ability to capture the true pulse of the sector and shed light on emerging trends and challenges alike."

As competition intensifies, operators are discovering that concept alone is no longer sufficient. Successful businesses increasingly rely on a combination of strategic site selection, differentiated positioning, financial planning, and professional management. The barriers to long-term success in Beirut F&B market are rising as the sector becomes increasingly competitive.

Geographically, the strongest growth continues to be concentrated in a number of key districts.

Even after accounting for the separation of Saifi Village into an independent zone, Downtown Beirut recorded the highest annual growth rate, expanding by 43.8% compared to the previous year. While part of this increase can be attributed to the low F&B supply levels observed between 2019 and 2025, it also reflects the district's revival. The area continues to benefit from new openings in Beirut Souks, renewed activity across the central district, and the growing appeal of surrounding neighborhoods. With additional projects expected in the coming years, Downtown appears to be gradually reclaiming its position as one of Beirut's key commercial and leisure destinations.

Geographically, the strongest growth continues to be concentrated in a number of key districts.

Saifi Village also emerged as one of the strongest performers, recording a 38.9% increase in supply. Once considered merely an extension of Downtown, Saifi has increasingly developed its own identity, attracting a mix of café-restaurants, specialty coffee concepts, bakeries, and premium dining destinations. The district's architectural character, pedestrian-friendly environment, and boutique atmosphere continue to appeal to both investors and consumers.

Avenue du Parc maintained its strong momentum as one of Beirut's most upscale F&B destinations. The district continues to attract premium concepts and affluent clientele, reinforcing its position as one of the capital's fastest-growing areas over the past several years. Verdun likewise continued its steady expansion, supported by the strength of ABC Verdun, the return of international brands, and the area's established residential and commercial catchment.

Perhaps the most remarkable story remains Ashrafieh, which has evolved into Beirut's dominant F&B hub. When combining Sassine, Gemmayzeh, Mar Mikhael, Monnot-Sodeco, and Furn el Hayek, the broader Ashrafieh area accounts for five of the thirteen zones surveyed and represents a substantial share of Beirut's total F&B inventory. The district continues to benefit from its strong residential base, walkability, and ability to accommodate a wide variety of concepts ranging from neighborhood coffee shops to high-end dining destinations.

Within this cluster, Mar Mikhael remains the city's largest F&B district with 120 operating outlets. Despite experiencing fluctuations over the years, the area continues to attract operators thanks to its strong identity, vibrant atmosphere, and diverse customer base. Gemmayzeh follows closely with 110 outlets and remains one of Beirut's most iconic F&B destinations.

Not all districts are experiencing the same pace of growth.

Together, the two districts account for 230 operating outlets, representing nearly a quarter of the total supply identified in the survey. Considering the extent of the destruction caused by the Beirut Port explosion less than six years ago, their recovery remains one of the most powerful demonstrations of the sector's resilience.

Not all districts are experiencing the same pace of growth. Hamra remained stable during the survey period, recording no increase in outlet count. While the district remains one of Beirut's largest F&B zones with 105 operating outlets, the limited availability of new spaces has naturally slowed its expansion. Similarly, Badaro and Gemmayzeh recorded more moderate growth rates compared to emerging districts, suggesting that these markets may be entering a more mature phase of their development cycle. In Gemmayzeh's case, this relative slowdown should not be interpreted as a sign of weakness but rather as an indication that the district has already achieved a high level of development and remains one of Beirut's largest and most established F&B destinations.

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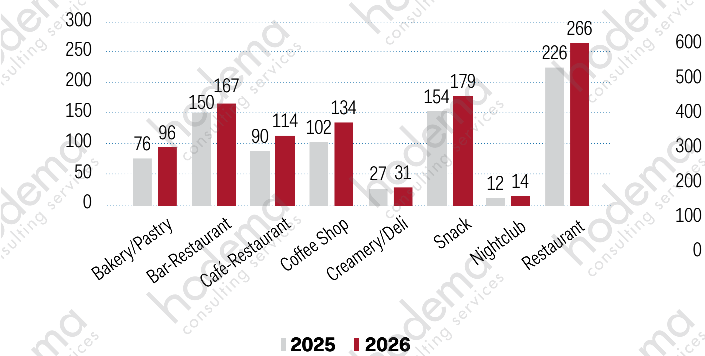
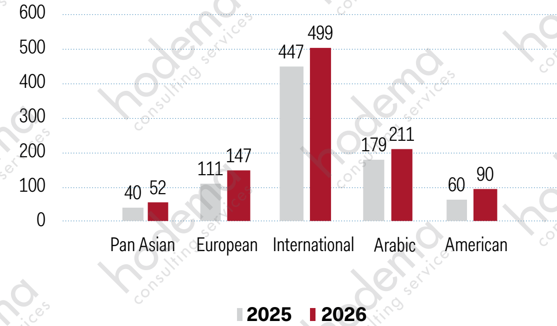
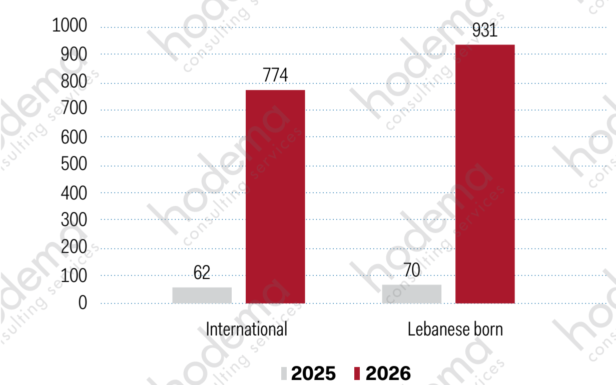
Number of F&B outlets per category



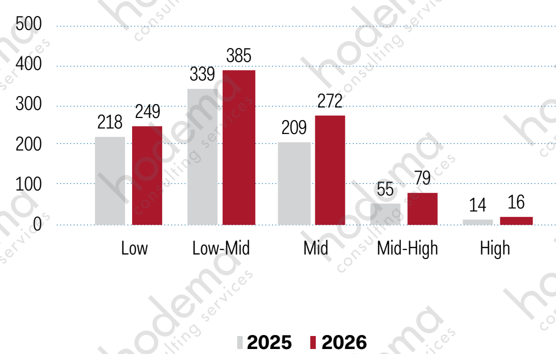
Number of F&B outlets per type of cuisine



Number of F&B outlets per concept origin



Number of F&B outlets per positioning



F&B outlets

837 IN 2025

1001 IN 2026

The Natural Expansion of Beirut's F&B Market

While Beirut remains Lebanon's largest and most diverse food and beverage destination, Antelias-Naccache-Dbayeh has firmly established itself as one of the country's most dynamic and rapidly expanding F&B hubs. The comparison between the two markets reveals not only differences in size and composition, but also two distinct stages of development.

Antelias-Naccache-Dbayeh has established itself as a major F&B destination, with 196 operating outlets—more than double the average size of a zone in Beirut, which hosts approximately 77 outlets. The area has also experienced remarkable growth in recent years. Between 2025 and 2026, Antelias-Naccache-Dbayeh recorded 51 new openings, compared to an average of 14 new openings in Beirut zone. Furthermore, approximately 26% of all operating outlets in Antelias-Naccache-Dbayeh are newly opened concepts, compared to 19% across Beirut as a whole. These figures suggest that Antelias-Naccache-Dbayeh remains in a more active growth phase than many of the capital's mature districts.

Several factors help explain this momentum. Over the past few years, investors and operators have increasingly looked beyond central Beirut in search of larger premises, easier accessibility, ample parking, lower rents, and closer proximity to affluent residential communities in Metn and Keserwan. At the same time, recurring economic, fuel-related, and security challenges have encouraged consumers to remain closer to home, reducing the appeal of trips into the capital. Antelias-Naccache-Dbayeh has benefited directly from these shifts, strengthening its position as a convenient and attractive destination for both residents and visitors from across Greater Beirut and Mount Lebanon. What was once primarily a commercial corridor has gradually evolved into a fully-fledged F&B destination, supported by a growing concentration of concepts and the continued expansion of established operators.

When examining cuisine types, notable differences emerge.

Restaurants are the dominant category in both Beirut and Antelias-Naccache-Dbayeh, accounting for 27% of Beirut's total offer and 30% of Antelias-Naccache-Dbayeh's supply. Beirut's F&B landscape also includes a higher concentration of snack outlets and bar-restaurants, reflecting its denser urban environment and stronger pedestrian activity. Antelias-Naccache-Dbayeh, by comparison, exhibits a more balanced category mix across bar-restaurants, café-restaurants, and bakeries.

When examining cuisine types, notable differences emerge. International cuisine remains the dominant category in both areas, accounting for 50% of Beirut offer and 36.2% of Antelias-Naccache-Dbayeh. Beirut's greater concentration of international concepts reflects its role as the country's most diverse culinary destination, attracting a wider variety of operators, concepts, and clientele.

On the other hand, Antelias-Naccache-Dbayeh displays a stronger presence of European and Pan-Asian cuisines. European concepts account for 20.5% of the area's offer compared to 15% in Beirut, while Pan-Asian cuisine represents 8.6% of supply versus only 5% in the capital. This trend suggests a growing appetite among Antelias-Naccache-Dbayeh consumers for specialized dining experiences and international culinary influences. Arabic cuisine remains well represented in both markets, accounting for 21% of Beirut's offer and 18% of Antelias-Naccache-Dbayeh.

Despite Antelias-Naccache-Dbayeh's rapid development, both markets remain overwhelmingly driven by local entrepreneurship. International brands represent only around 7% of total supply in both Beirut and Antelias-Naccache-Dbayeh, highlighting the continued dominance of Lebanese operators and locally developed concepts.While international brands such as Pinkberry, Joe & The Juice, and upcoming projects continue to attract attention, the Lebanese market remains largely shaped by homegrown brands and independent operators.

The most significant distinction between Beirut and Antelias-Naccache-Dbayeh appears when analyzing market positioning. Beirut's offer remains heavily concentrated in the low and low-mid segments, which together account for nearly two-thirds of all concepts. Low-end outlets alone represent 25% of the capital's supply, while low-mid concepts account for an additional 39%. This reflects Beirut's diversity, serving a broad range of customer segments including students, office workers, residents, tourists, and nightlife clientele.

At the upper end of the market, the differences become less pronounced.

Antelias-Naccache-Dbayeh, by contrast, is increasingly positioning itself as a mid-market destination. Nearly half of all concepts in the area fall within the mid-end segment, compared to only 27% in Beirut. Low-end concepts account for just 12% of supply, almost half the proportion observed in the capital. This positioning reflects the area's affluent residential catchment and the tendency of operators to target family dining, destination restaurants, and premium casual experiences.


© Al Falamanki Antelias

At the upper end of the market, the differences become less pronounced. Mid-high and high-end concepts account for 7% of Antelias-Naccache-Dbayeh supply and 9.5% of Beirut, confirming that both markets continue to be largely driven by mass-market and mid-market concepts rather than luxury dining.

Ultimately, the comparison highlights the emergence of a complementary relationship between the two destinations. Beirut remains the country's benchmark market, offering the highest level of diversity, innovation, and density. Antelias-Naccache-Dbayeh, meanwhile, has evolved into a powerful suburban alternative, capable of attracting significant investment and supporting concepts that may not necessarily find the same opportunities within the capital's increasingly saturated districts. This evolution is reflected in the growing number of Beirut-born brands that have expanded into the area, including Cyrano, Emotions, Backburner, and Ginette. In contrast, others, such as Em Sherif and The Bros, are expected to open in the near future. At the same time, the area has developed its own collection of landmark destinations, including Al Halabi, Cézanne, and Le Flocon, further reinforcing its identity as a destination in its own right.

The continued expansion of Antelias-Naccache-Dbayeh also reflects a broader transformation within Lebanon's F&B landscape. Growth is no longer confined to Beirut. Instead, investors and operators are increasingly following consumers closer to where they live, creating strong secondary destinations that complement the capital's traditional F&B clusters. As a result, Antelias-Naccache-Dbayeh is no longer merely an extension of Beirut's market—it has become a destination in its own right and one of the country's most important F&B growth stories.


© Momaki Dbayeh

Furn el Hayek *A Neighborhood Finds Its Marks*

Furn el Hayek has emerged as one of Beirut's most attractive neighborhood F&B destinations, gradually evolving from a predominantly residential area with limited commercial activity into a vibrant dining and café hub. Characterized by its quiet streets, residential buildings, and strong neighborhood atmosphere, the area offers a distinctly European feel that sets it apart from many of Beirut's traditional F&B districts, which typically revolve around a single commercial strip. Instead, Furn el Hayek's outlets are dispersed throughout its streets and corners, creating a more organic, walkable, and community-oriented experience.

As a newly defined F&B zone within Hodema's market survey, Furn el Hayek currently hosts 73 operating establishments. The area has evolved significantly over the past few years, as former neighborhood shops and corner stores have gradually been converted into restaurants, cafés, and specialty concepts. Examples include Brasserie à Trois, La Tarterie, and Izzy, all of which occupy spaces that once served entirely different purposes within the neighborhood. This transformation has enabled Furn el Hayek to expand its F&B offer while preserving much of its residential charm and distinctive character.

The area is home to several long-established landmarks that have helped shape its identity over the years. Beirut Cellar remains one of its historical F&B institutions, while Bread Republic, Liza, and Mandaloun Café continue to attract a loyal clientele. More recently, a new wave of operators has further strengthened the area's appeal, with openings such as Mama Jay, Marly's, Nayla, Iki, and Kiki's adding new energy to the neighborhood. Furn el Hayek has also become known for its café-trottoir culture, a trend largely initiated by Bread Republic when it opened in 2003, over two decades ago, and one that continues to influence many of the concepts found in the area today.

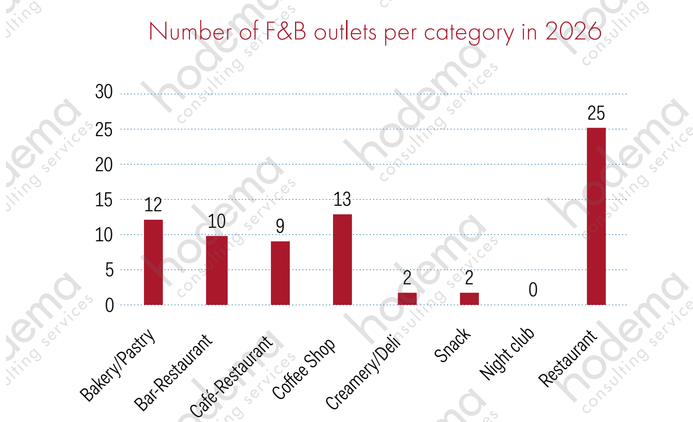
The neighborhood's F&B offer is largely concentrated around international cuisine, with 34 outlets accounting for 47% of the area's total supply. European and Arabic cuisines follow representing 23% and 18% of the market, respectively. Pan-Asian cuisine remains underrepresented, with only three restaurants operating in the zone, the lowest share among all cuisine categories tracked in the area. However, several Pan-Asian concepts are currently in the pipeline, which could strengthen the category's presence in the coming years. In addition, a new hotel development on Charles Malek Avenue is expected to generate additional footfall and support further growth in the surrounding F&B market.

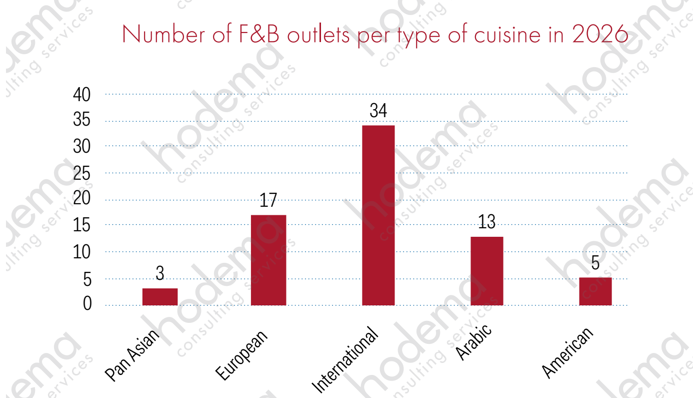
Furn el Hayek is also home to the Restos Saint Nicolas cluster, which gathers established brands such as Roadster, Bartartine, and Dunkin' in one location. The cluster contributes to the area's visibility and reinforces its position as a convenient dining destination for residents, office workers and visitors alike.

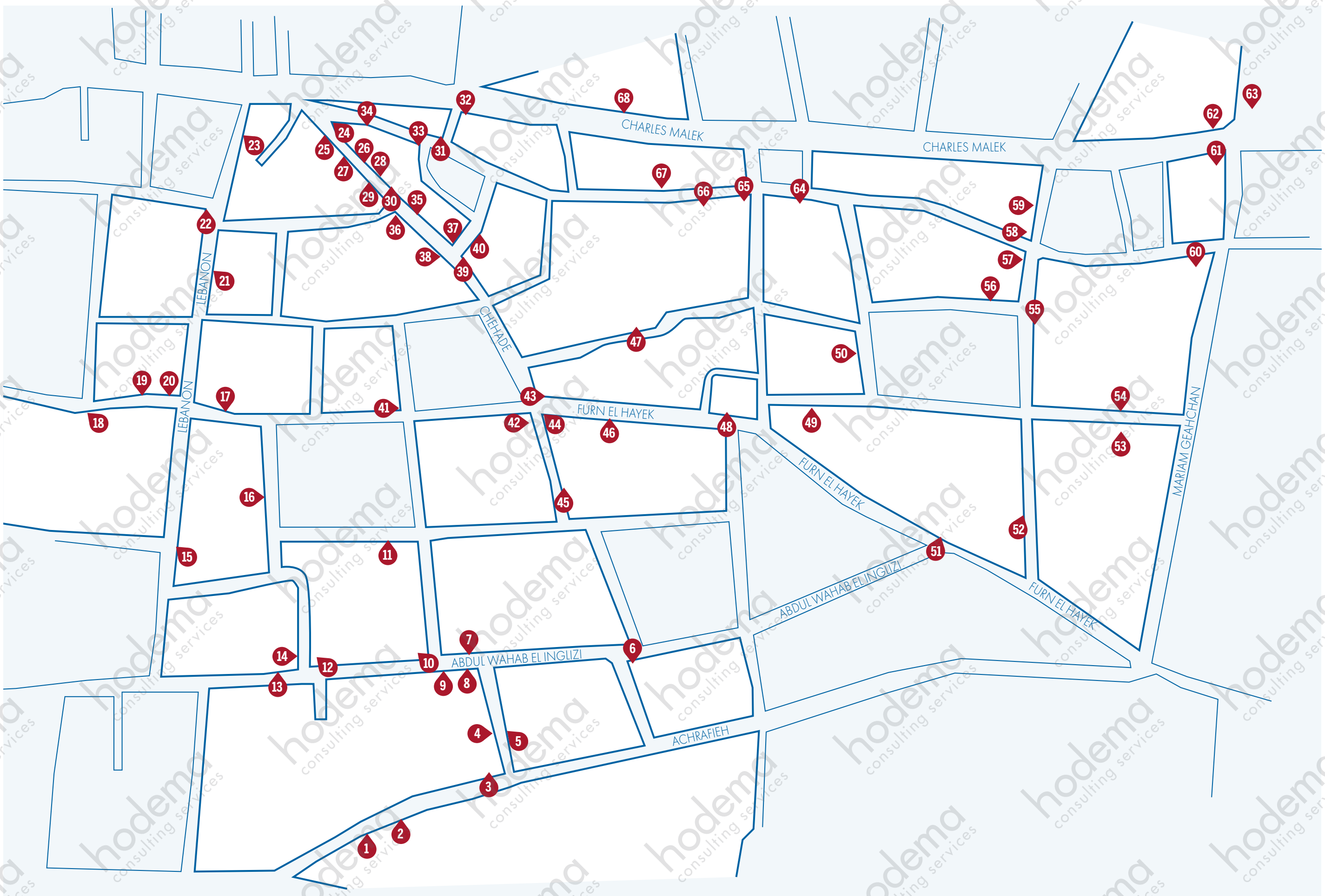
Restaurants remain the dominant category among the 73 outlets tracked, accounting for 34% of the total offer. Unlike many Beirut districts that specialize in a limited number of concepts, Furn el Hayek hosts establishments across almost every category, with the notable exception of nightclubs. Coffee shops rank second with a total of 13 outlets, followed by bakery and pastry concepts with 12 outlets. Together, these three categories alone represent nearly 70% of the zone's total F&B offer, reinforcing the neighborhood's daytime appeal and its relaxed, community-oriented atmosphere.

Positioning-wise, Furn el Hayek is primarily a mid-market destination. The mid-end segment dominates, representing 42% of the total offer, while low and low-mid concepts together account for 25 outlets of supply. The area also records a strong presence in the upper segments, representing 23% of the market. In fact, Furn el Hayek hosts the highest number of high-end concepts among all Beirut areas studied, including renowned establishments such as Liza, Marly's, and Rubia Gallega by Maison Chal. Taken together, mid-high and high-end outlets account for nearly one in four establishments in the zone, pointing to a market that is increasingly attracting premium operators.

This combination of neighborhood cafés, established restaurants, and upscale dining venues gives Furn el Hayek a unique positioning within Beirut's F&B landscape. While the area continues to grow and attract new concepts, it has managed to maintain its residential charm and strong local identity, making it one of the city's most promising and well-balanced dining destinations.

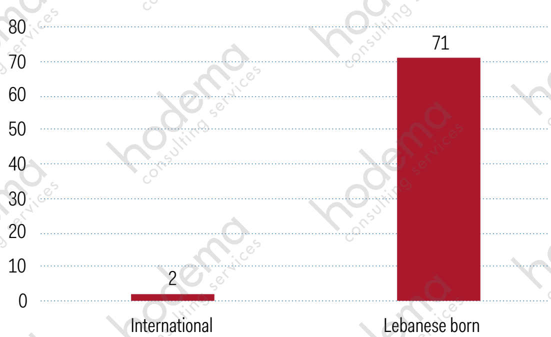




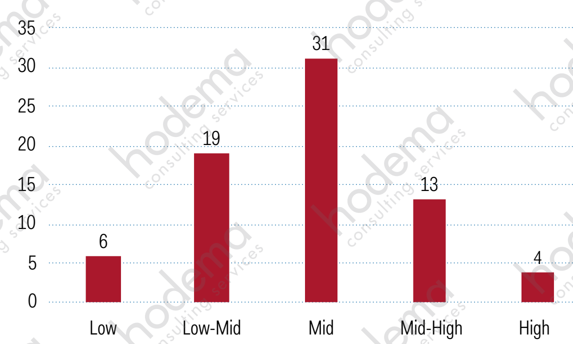


1. Café Baydoun
2. Furn Baydoun
3. Fekhanit el Sultan
4. Beats Café
5. Furn Michel
6. Tsunami
7. Agora
8. ENN Healthy Living Atelier
9. Jnaynet el Khaweja
10. PizzaWa
11. Liza
12. Centerstage
13. Amavi
14. The Townhouse
15. La Tarterie
16. Mamaz Kitchen
17. The Spot Restobar
18. Chez Gaston
19. Germanos Bistrot
20. Matilde
21. Sweet Nothing
22. Ritage Garden
23. WAY - Makers Studio and Coffee Bar
24. Souchet
25. Le Café
26. Manuccini
27. Mama Jay
28. Vafa'
29. Mama Green
30. Flocon Doux
31. Le Huitieme Coffee Shop
32. Choco Crêpe
33. Lebanese Bakery
34. Sandwicherie
35. Sippycup Coffee Shop
36. Les Caves de Taillevent
37. Rouba Khalil Kitchen To Go
38. Skale
39. The Beirut Cellar
40. Joulia
41. Brasserie à Trois
42. Corner 54
43. Incontro Café
44. Bread Republic/ The Wine Room
45. Izzy
46. Furn el Hayek Bakery
47. Photography Café
48. Jalousie
49. Marly's
50. Nayla
51. Angelo
52. Namat Café
53. Kiki's
54. Iki
55. Cluckerie
56. Le Zed
57. Super Dfouni
58. Sô
    Comptoir du Sô
59. Nougi
60. Rubia Gallega - Maison Chal
61. Veranda
62. Rouge Bonbon
63. Jean Claude
64. Odette
65. Now
66. Emotions
67. Restos Saint Nicolas
    Bartartine
    Roadster
    Obi Sushi
    Café d'Orient
    Dunkin'
68. Mandaloun Café

Number of F&B outlets per concept origin in 2026



Number of F&B outlets per positioning in 2026



F&B outlets

73 IN 2026

Mar Mikhael *Resilient and Roaring Back*

Mar Mikhael remains a vibrant and densely populated F&B destination, continuing to attract entrepreneurs, independent operators, and new concepts seeking visibility within the city's most established lifestyle district. Hodema counts a total of 120 outlets in the area this year, making it the largest F&B cluster in Beirut. After experiencing a 12% decline in supply between 2024 and 2025, the zone has rebounded strongly, recording an 11.1% increase this year and demonstrating its resilience despite the constant turnover that characterizes the neighborhood.

Unlike many of Beirut's other F&B destinations, Mar Mikhael is largely driven by independent operators rather than large groups or chains. The area has built its reputation on experimentation and entrepreneurship, with many concepts choosing to launch their first outlet in Beirut within the neighborhood.

Despite recent shifts, Mar Mikhael continues to be defined by its eclectic mix of casual restaurants, bars and bar-restaurants. The area's landmarks remain strong and include concepts such as Tavolina, Marinella, L Matbakh, Baron, Bakelab, Kalei Coffee Co., and Tom & Mutz all of which contribute to the neighborhood's unique character and loyal customer base. However, the district also witnessed notable departures this year. The closure of Tawlet marked the first time the brand exited Mar Mikhael since opening in 2009, with the concept set to relocate to Starco in Fall 2026. Another landmark, Slate, left the neighborhood and is relocating to Saifi Village.

The area's offer remains heavily oriented toward nightlife and casual dining. Bar-restaurants dominate the market, with 47 outlets accounting for 39% of the total supply, representing the highest concentration of this category among all zones surveyed. While the segment declined by 18% between 2024 and 2025, it began to recover in 2026, recording a 15% increase in supply. In contrast, Mar Mikhael records the lowest number of café-restaurants among all Beirut zones, with only one outlet operating in this category: Orenda, one of Beirut's first fully vegan concepts.

The neighborhood remains particularly known for its burger culture. Mar Mikhael hosts the largest concentration of burger concepts in Beirut, ranging from early pioneers such as The Bros to more recent operators, including Bunman, Crave's Burger, and the upcoming Cali. This trend continued in 2026, as American cuisine recorded one of the strongest growth rates in the area, supported by the opening of seven new concepts, including Happy Kid, New York City Pizzeria, and GBB Burger. As a result, Mar Mikhael now hosts 16 American cuisine concepts, the highest number among all Beirut districts.

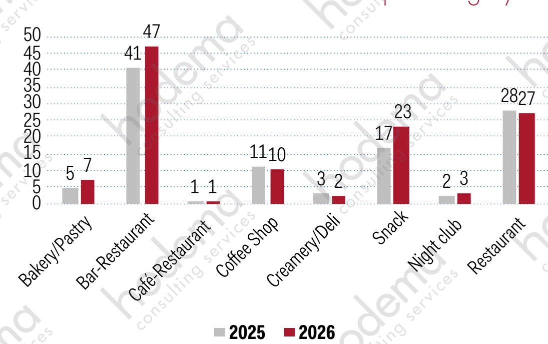
International cuisine remains by far the dominant culinary category, with a total of 71 outlets despite a gradual decline observed over the past several years. At the same time, Pan-Asian cuisine has gained significant momentum. Three new concepts opened in 2025-2026, namely The Tori Room, Kenshō Concept, and The Wok. Despite the closure of O Sake, the category doubled in size from three to six outlets, reflecting the growing popularity of Asian-inspired concepts among the area's clientele.

Positioning-wise, Mar Mikhael continues to be largely driven by the lower market segments. The area records the highest number of low-mid concepts among all zones studied, with a total of 60 outlets representing more than half of the district's supply. Low and low-mid concepts continue to increase steadily, reinforcing the neighborhood's reputation as an accessible destination for casual dining, drinks, and social gatherings.

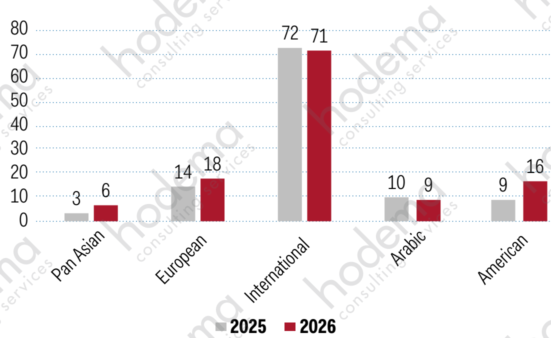
The strongest growth this year was recorded in the mid-end segment, supported by the arrival of concepts such as Intercode, Loom, Theo, Bruno, and Oro Lounge Bar. In contrast, the mid-high segment continued to decline, while the area remains one of the few Beirut districts without any high-end concepts. This positioning reflects the neighborhood's identity as a dynamic, creative and accessible destination rather than a premium dining market with the exception of some landmarks.

While Mar Mikhael continues to evolve, its core character remains unchanged. The neighborhood retains its reputation as Beirut's hub for independent operators, experimental concepts, and nightlife-driven venues. With new concepts continuing to enter the market and the northern part of the district gradually developing through newcomers such as Mashwa Beirut, Mar Mikhael remains one of the city's most influential and distinctive F&B destinations.

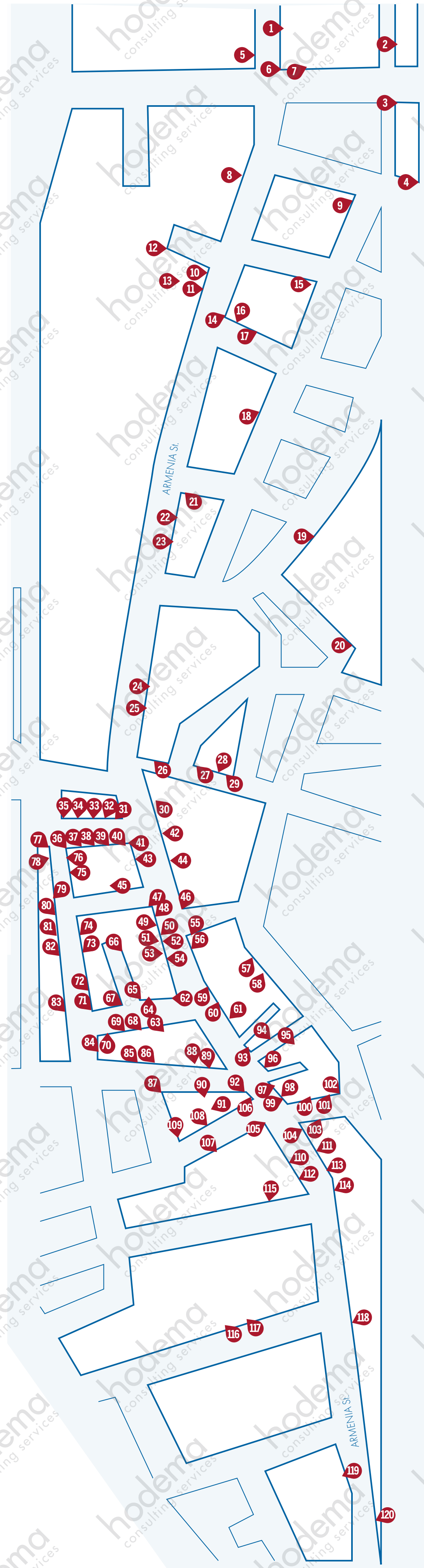
Number of F&B outlets per category



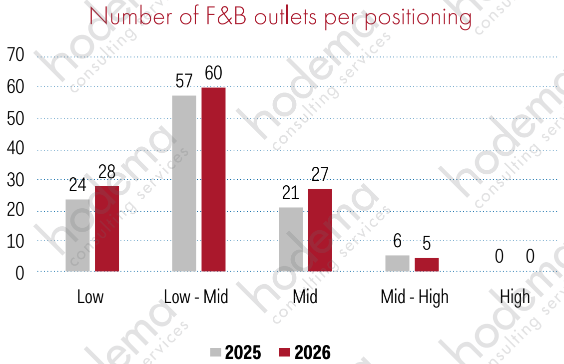
Number of F&B outlets per type of cuisine



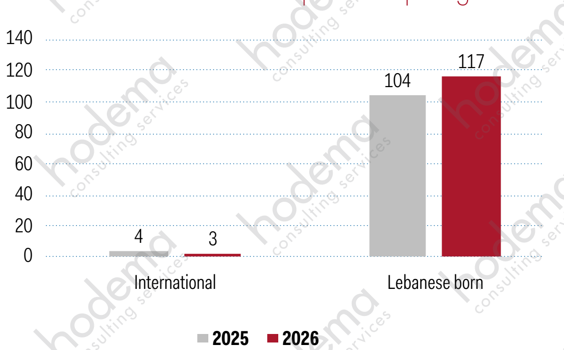
1. Chop Suey
2. Tota
3. Mario e Mario
4. Riwaq Beirut
5. Leon Snack
6. Bachir Ice Cream
7. La Scène
8. Orenda
9. Seza
10. Sister Wraps
11. Starbucks
12. Clay Ceramics Coffeeshop
13. Zaia
14. Provencial
15. 100 Hala
16. Oro Lounge Bar
17. Tusk Bakery
18. PizzAria
19. Makan - Jacaranda
20. Kalei Coffee Co.
21. While We're Young
22. Riff Bar & Eatery
23. Tom & Mutz
24. Madame Om
25. Beyt
26. Baguette Bitro
27. Strada
28. 3l Daraj
29. Sole Insight
30. The Bros
31. Smash Babe
32. The Wok
33. By the Slice
34. Kaakeh Square
35. The Road
36. Entrecôte et Frites
37. Super Bowl
38. The Living Room
39. Smoak
40. Gilberts Burger Bites
41. New York City Pizzeria
42. Baguette de Paris
43. Swirkies
44. Plateau
45. Mac N' Cheese
46. Lantana
47. Kaos
48. Eclipse
49. Favela Beirut
50. Central Station
51. Amelia Restaurant & Bar
52. Crew Hut - Doodle Cup
53. Mrs. Lovett
54. Tribute
55. Target Shot
56. Abbey Road
57. The Bohemian Bar
58. Fabrk
59. Catrinas
60. Tirilalli
61. Bodo
62. Internazionale
63. Smushkies
64. Chaplin
65. Caffeine Coffee Roaster
66. The Smoking Barrels
67. Mashawish
68. The Tori Room
69. Entre Deux Bistro
70. Kenshō Concept
71. Baalbaké
72. Flat White
73. Bakelab Counter
74. Baron
75. Furni
76. Warwudufil Coffeeshop
77. Bunman
78. Frooza Booza
79. Crave's Burger
80. Aleb
81. Fizz
82. The Wooden Cellar
83. O's focacceria
84. Frieten
85. The Retro Pub
86. Prune Le Bistrot
87. Tavolina
88. Wrap a Belly
89. Marlies Burger
90. Das Küche
91. Marinella Trattoria
92. Pizza Hut
93. Bar Xpress
94. L Matbakh
95. 3 1/2 Pub
96. Bruno
97. Floyd The Dog
98. Mr. Bartender
99. Bonavida
100. Lloyd's
101. Tequila Terrace
102. Tipsy Cowboy
103. Esquina
104. Bar 35
105. Emroot Beyroot
106. Submarine
107. Calibri
108. Fry Harbour
109. Meats & Bread
110. Théo
111. Fuego
112. Happy Kid
113. Komuniti
114. Loom
115. Au Blé Dor
116. Ibiza by Karma
117. Intercode
118. Okra
119. Shrimp Republic
120. Tamashii



Number of F&B outlets per positioning



Number of F&B outlets per concept origin



F&B outlets

108 IN 2025

120 IN 2026

Sassine *Consistent but Always in Motion*

Sassine continues to demonstrate steady and consistent growth, reinforcing its position as one of Beirut's most reliable and quietly evolving F&B districts. Hodema counts a total of 109 outlets in the area this year, representing a 9% increase compared to last year. Unlike some of the city's more trend-driven destinations, Sassine has developed through a gradual cycle of openings, renovations, and concept upgrades, allowing the district to maintain its relevance while preserving its broad appeal to residents, families, office workers, and shoppers.

The area's positioning remains largely low to mid-market, making it one of Beirut's most accessible dining destinations. At the same time, Sassine benefits from a diversified offer spread between the traditional commercial streets of Achrafieh and the influence of ABC Mall, which continues to play a major role in shaping the area's retail and F&B landscape. The mall remains active in renewing its tenant mix, with several changes announced over the past year, including the arrival of Noura Café, the upgrade of Duo, and the departure of Abdel Wahab after many years of operation. Additional changes are also expected, notably the arrival of Angelina, which will replace Napolitana. Napolitana, in turn, will share space currently occupied by Met.

Several new concepts have contributed to the area's growth this year. Pouloche opened its second branch following the success of its original location in Hazmieh, while Totò expanded into Sassine from Furn el Hayek. Other newcomers include Flo and Enville Bistro, both of which further diversify the area's dining offer. The return of BtoB was also noted, while Fine Bouche evolved from a delicatessen and épicerie fine into a restaurant after successfully developing a dine-in clientele.

Sassine remains anchored by a number of long-standing landmarks that continue to generate strong traffic and customer loyalty. Concepts such as Chili's, Starbucks, Hajj Nasr, Noura and Diwan Beirut—currently undergoing renovation—remain key references within the district. The return of The Chase in 2025 also marked the comeback of one of the area's historic names.

One of Sassine's greatest strengths lies in the diversity of its offer. The area hosts concepts across virtually every outlet category, with the exception of nightclubs. Restaurants remain the dominant category, accounting for 30 outlets, while snacks follow closely with 24% of the market. The district records the highest number of restaurants among all Beirut areas studied, reflecting its role as a major dining destination within the capital.

The area is particularly strong in categories traditionally associated with neighborhood and family-oriented consumption. Sassine records the highest number of bakeries and pastry shops in Beirut, with a total of 17 outlets, as well as the highest number of creameries with 10 concepts. Coffee shops have also continued to grow over the past year, while bar-restaurants have gradually declined, reinforcing the area's daytime appeal rather than a nightlife-driven identity.

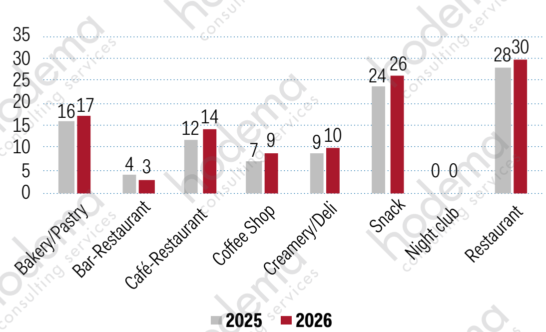
From a culinary perspective, international cuisine remains the dominant category, with a total of 50 outlets, followed by European cuisine. Both segments continued to expand throughout 2025 and 2026, with Sassine now recording the highest number of European cuisine concepts among all areas surveyed, totaling 26 outlets. This growth has been supported by the arrival of concepts such as The Gelato Show and the Swiss chocolatier Läderach at ABC Mall.

In contrast, Pan-Asian cuisine remains relatively limited, with only four concepts operating in the area. This comparatively low presence reflects the district's stronger orientation toward mainstream international dining, cafés, bakeries, and family-oriented concepts rather than highly specialized cuisines.

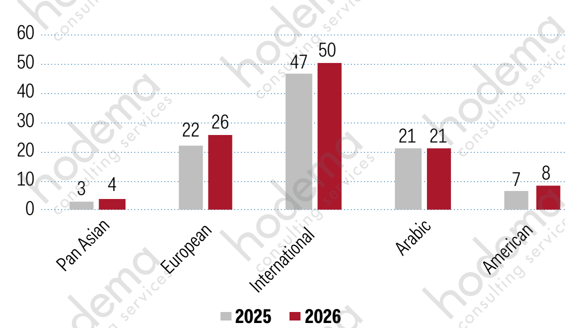
Positioning-wise, Sassine remains heavily concentrated within the low, low-mid and mid-market segments, all of which continue to expand year after year. This positioning aligns with the area's broad customer base and its role as an everyday dining destination. In contrast, the mid-high and high-end segments remain relatively limited and have shown little change over recent years. These upper segments are represented primarily by premium chocolatiers and pastry brands such as Noura, Lakrids by Bülow, alongside Au 6ème, which remains the district's only high-end restaurant concept.

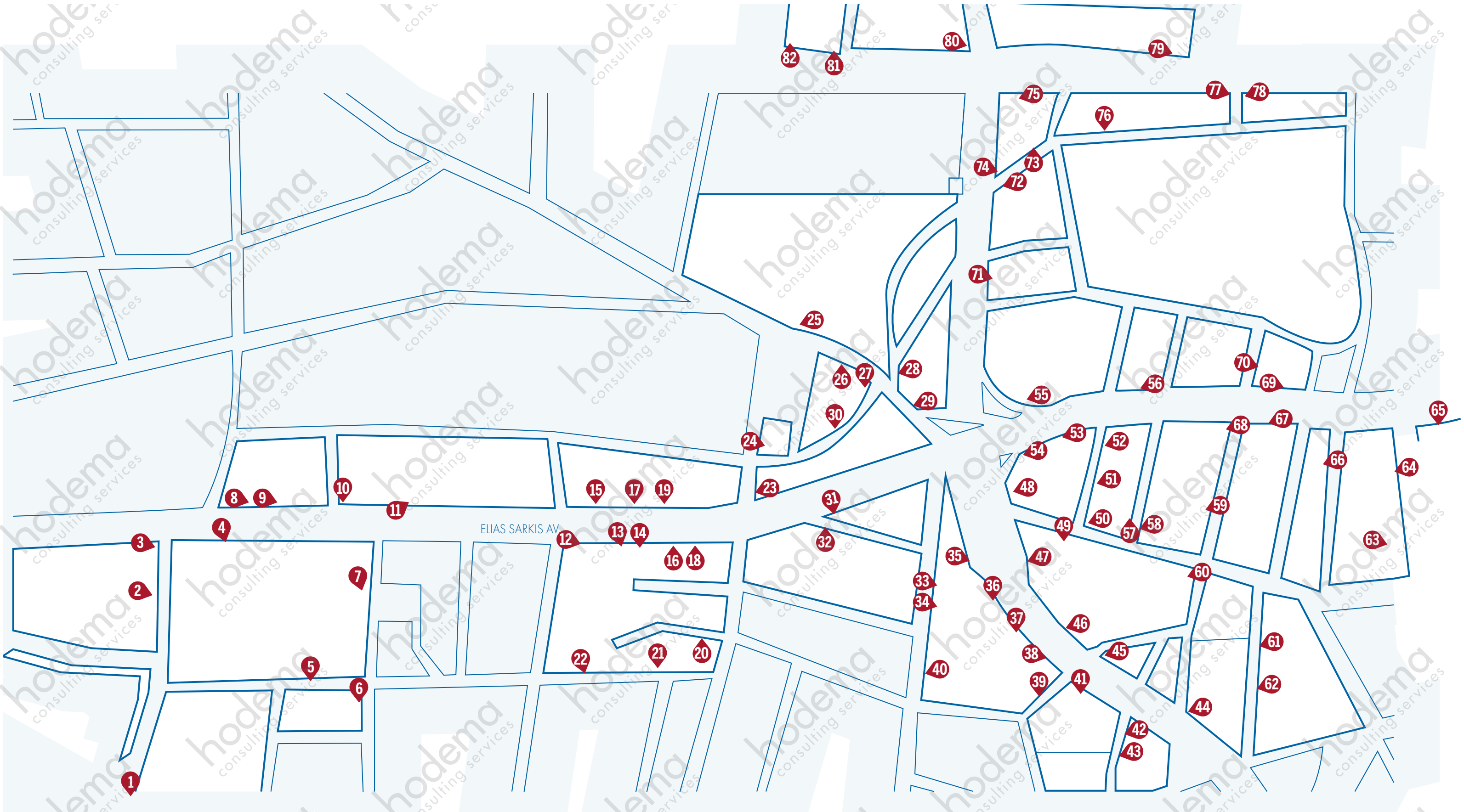
Combining strong fundamentals, a diversified offer and a steady pace of renewal, Sassine continues to distinguish itself as one of Beirut's most stable F&B markets.

Number of F&B outlets per category



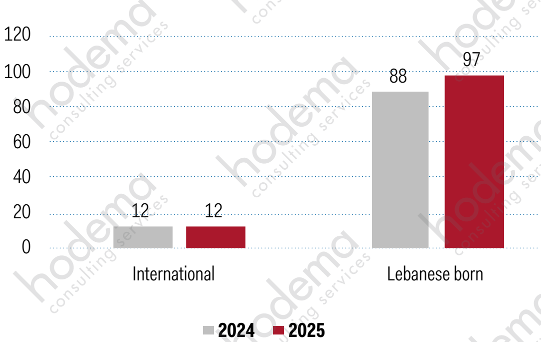
Number of F&B outlets per type of cuisine



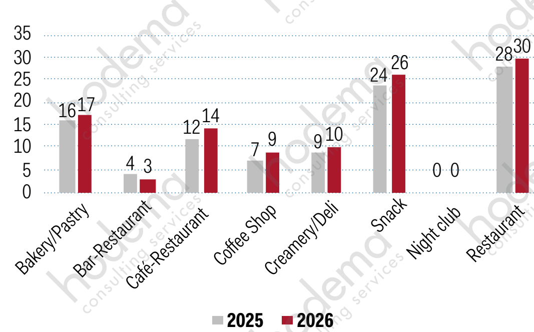


1. Furn Atallah
2. Park Tower Suites
3. Crepaway
4. DÜRÜMJİ
5. Suprime
6. East Village Neighborhood Eatery
   Au 6ème
7. Pizzeria Del Vico
8. Totò Cucina Italiana
9. Tribu
10. Chili's Grill & Bar
11. Sofitel La Verrière
12. Mr. Brown
13. Cantina Beirut
14. Cantina Sociale
15. Des Choux et des Idées
16. Fine Bouche
17. Le Flocon Artisan Glacier
18. Pâtisserie Savoie
19. Hoda et Chocolat
20. BtoB
21. La Vie Claire
22. Pâtisserie Mezher
23. Brewholic Café
24. Pouloche
25. ABC
   Abdel Wahab
   Bartartine
   Casper & Gambini's
   dipndip
   Divvy
   Dunkin'
   Joe & the Juice
   Leila
   Napoletana Pizzeria
   Ni caffé
   Paul
   Roadster Diner
   Starbucks
   Zaatar w Zeit
   The Glow Paradise
   Oh My Gelato
   Pinkberry
   A. Café (Antoine Café)
   Phil & Joe
   Sablés Gourmets
   La Mie Dorée
   Met
   Miss Mi Mochi
   Lakrids by Bülow
   Läderach
   Duo
26. Falafel Freiha
27. Noura
28. Malak al Tawouk
29. Ekht Manoushe
30. Furn Nour
31. Chatime
32. Stellato
33. Al Massoud Grill
34. Tonino
35. Burger King
36. Pain D'or
37. Fouad Douaihy Sweets
38. Kababji
39. Roots Homemade Sandwiches
40. Axis/Brewverse
41. Beit Al Shawarma
42. The Little Bakery
43. The Friendly Neighborhood Coffeeshop
44. Le Crémier
45. Royal Tulip
   Ristretto
   Royal Tulip Rooftop
46. Beit Moussallem
47. Hajj Nasr
48. The Chase
49. B Fresh Cocktails
50. Furn w Moajjanet
51. Doudou
52. Lala Chicken
53. Al-Rifai
54. Douaihy Sweets
55. Starbucks
56. The Cask & Barrel
57. Le Voleur
58. Flo Bake & Brew
59. La Mie Dorée
60. Enville Bitro
61. Cooks Bakery & More
62. Call Saj
63. Nicolas Café Resto-Pub
64. 123 Pasta
65. The Gelato Show
66. Kaakaj
67. Sushi Star
68. Green Café
69. Pizzanini
70. Meet Board
71. Ashrafieh Café-Resto
72. Lala Chicken
73. HueO1
74. Kabab 365
75. Bread & Salt
76. LaWhere - The Food Hype
77. Bouboufe
78. Surgel
79. Sushi Circle
80. Diwan Beirut
81. Deek Duke
82. Tarte Citron

Number of F&B outlets per concept origin



Number of F&B outlets per positioning



F&B outlets

100 IN 2025

109 IN 2026

Monnot-Sodeco *A Timeless Beirut Classic*

Monnot-Sodeco continues to affirm its position as one of Beirut's most established and resilient F&B destinations. With a total of 84 outlets in the area this year, compared to 71 last year, the neighborhood records an impressive yearly increase of 18.3%, making it one of the fastest-growing zones among those studied. Unlike other areas that have undergone significant changes in clientele or positioning over recent years, Monnot-Sodeco remains remarkably stable, preserving the character and appeal that have made it a Beirut favorite for decades.

The area continues to attract a broad mix of customers throughout the day and night, benefiting from its central location, historic character, and dynamic nightlife scene. While the low and low-mid segments remain dominant, Monnot-Sodeco is also one of the neighborhoods witnessing the highest number of openings in the mid-high segment. This growing diversity in positioning reinforces the area's ability to cater to a wide range of occasions, from casual outings to more premium dining and nightlife experiences.

Monnot-Sodeco remains full of gems and city landmarks that continue to attract loyal clientele year after year. Long-established institutions such as L'Entrecôte de Paris, Em Sherif, Stove and Pacifico stay among the area's strongest performers, while newer additions such as The Terrible Prince and Kelly's Fish Lounge have successfully established themselves within the neighborhood.

Interestingly, many of the area's higher-end concepts are not located on the main roads but rather tucked away within the inner streets, particularly around Monnot Street and Abdel Wahab Street, creating pockets of premium experiences hidden within the neighborhood's more casual surroundings.

Among the most notable openings this year is Levain, a Lebanese-wine-exclusive bar developed by the owner of 209, an online Lebanese wine platform. The concept reflects the increasing interest in local wines and specialized beverage experiences. Also worth noting are Superchief and Limbo, two newcomers that embrace the growing speakeasy trend, which continues to gain momentum across Beirut's nightlife scene.

Despite being one of the area's main arteries, Petro Trad Street (Chari3 el 3arid) has not evolved into a major F&B destination, with only a handful of concepts operating along the street, including Kelly's Fish Lounge, Kebbet Zamen, and Pâte à Choux. Looking ahead, one of the most anticipated developments in the area is the return of Al Falamanki in a new format, which is expected to reopen at its historic location.

Monnot-Sodeco remains particularly strong in nightlife. The area records the highest number of nightclubs among the zones surveyed, with a total of five concepts operating today. The opening of Étincelle this year, replacing the iconic Cassino nightclub, further reinforces this positioning. The growth of bar-restaurants has also contributed to the area's vibrant evening atmosphere, particularly around Monnot Street, where concepts such as Hanine Beirut, and Son of a Bar have recently opened. The area is also renowned for its karaoke venues, including Drink & Sing and Roy Karaoke Club.

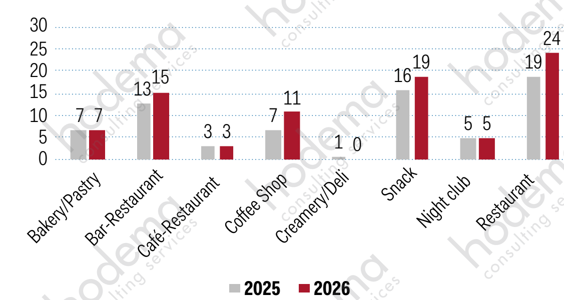
Certain categories remain largely absent from the neighborhood. Creameries are completely absent, while café-restaurants remain limited to only three outlets, making Monnot-Sodeco one of the least café-oriented zones in the study. Instead, the neighborhood continues to derive its strength from restaurants, bars, and nightlife-driven concepts.

Pan-Asian cuisine remained stable throughout the period, while American cuisine recorded growth thanks to the opening of two burger concepts in the area, Big Mike's by Mike Hayek and Boo Burger. International cuisine, however, continues to dominate the market, accounting for 54% of the area's total supply.

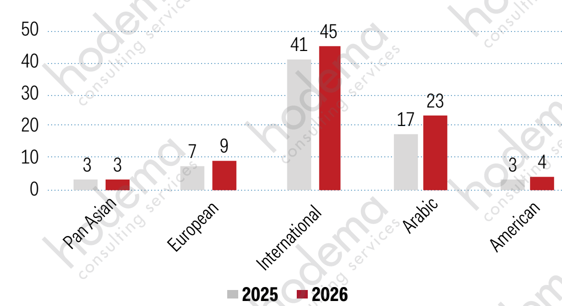
One of the most notable developments this year has been the resurgence of the mid-high segment. Following the closure of several mid-high-end concepts between 2024 and 2025, such as Sapa, the category has made a strong comeback with the arrival of Levain, Limbo, Pincette, and Superchief. As a result, the number of concepts positioned in this segment increased from three to eight outlets in 2025-2026. Meanwhile, the low, low-mid and mid segments continue to grow steadily, preserving the accessibility and broad appeal that have long defined the neighborhood.

At the upper end of the market, Monnot-Sodeco remains home to a select number of prestigious addresses, including Em Sherif, the Albergo Restaurant & Terrace, and the Albergo Swim Club within the Albergo Hotel. Together, these concepts reinforce Monnot-Sodeco's reputation as one of Beirut's most enduring and diverse F&B destinations, a neighborhood that continues to evolve while remaining a true valeur sûre in the city's F&B landscape.

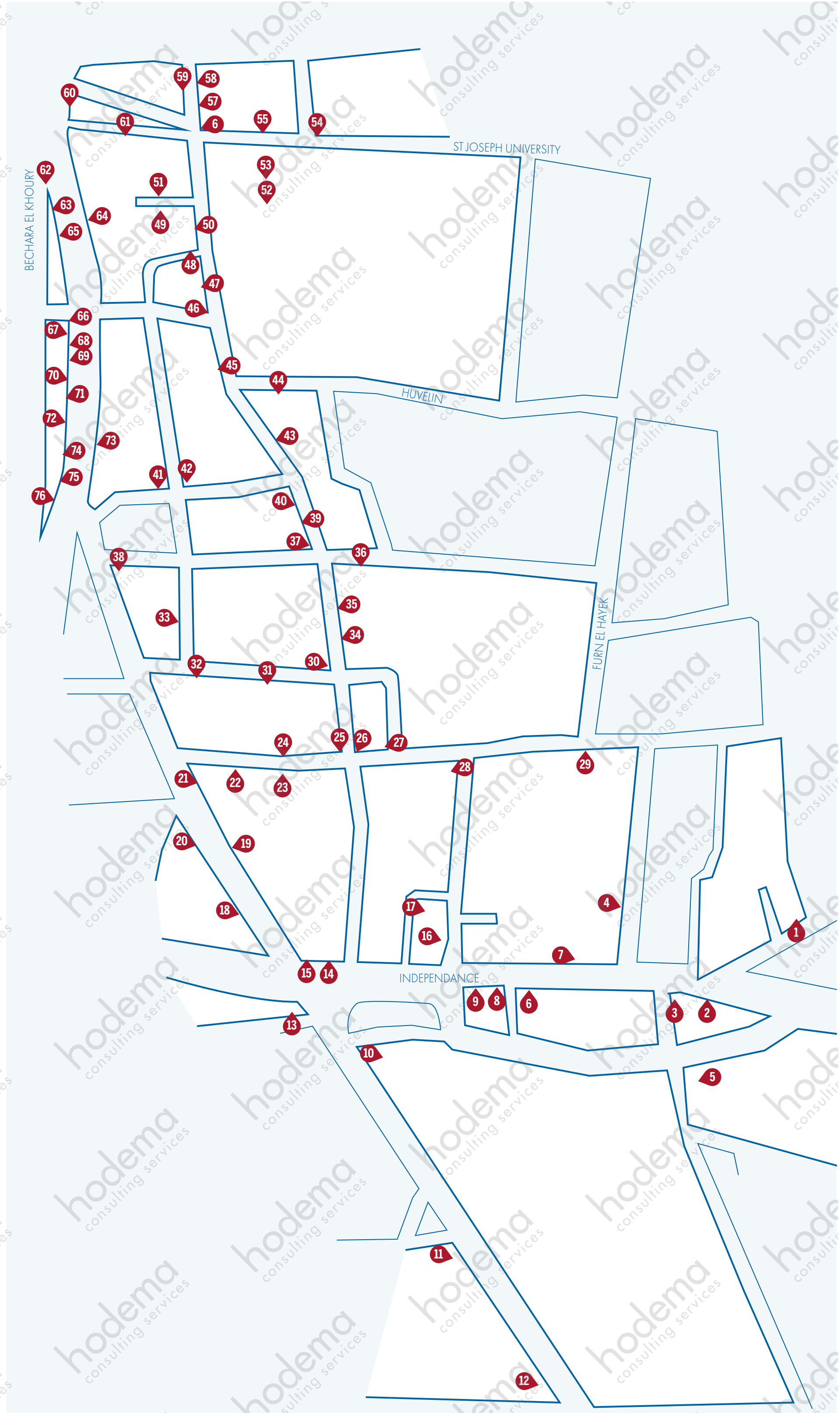
Number of F&B outlets per category



Number of F&B outlets per type of cuisine



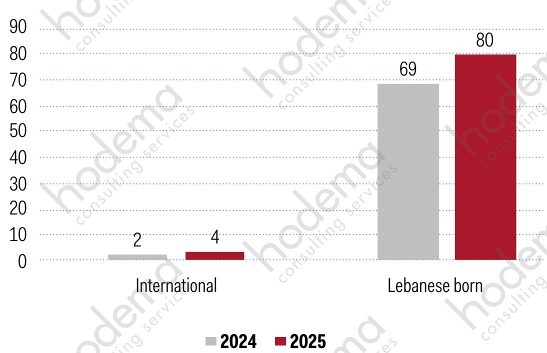
1. Malak el Sandwish
2. Zaatar w Zeit
3. El Estez Snack
4. Samakna
5. Alma/Soar
6. La Goulée
7. Patchi L'Atelier
8. The Fat Monk
9. Café Younes
10. Sodeco Square
    Café Younes
    T Square
    Hallab Croissant
    TimeOut Café
11. Classy Bites
12. Moulin d'Or
13. Etincelle
14. Rafic el Rashidi
15. Marrouche
16. Pâte à Choux
17. Kelly's Fish Lounge
18. Dunkin'
19. Anbar
20. Asbaya Snack
    Asbaya
21. Kahwet Azmi
22. Abd el Wahab
23. Santana
24. Bobo Fou
25. Le Relais de L'Entrecôte
26. Levain
27. Pincette
28. Kebbet Zamen
29. Albergo Hotel
    Albergo Lobby Café & Courtyard
    Albergo Restaurant & Terrace
    Albergo Swim Club
30. KP Brasserie
31. Son of a Bar
32. Taiga Beirut
33. Em Sherif
34. Stove
35. Pacifico
36. Hole in the Wall
37. The Terrible Prince
38. Naranj
39. Bar Lily
40. Olea & Fig
41. Boo Burger
42. Zur Bar & Bistro
43. OH! Bakehouse
44. The Comfort Food
45. The Glow Paradise
46. Coins Monnot
47. Gia La Cuccina del Amore
48. Celtic
49. Replay
50. Drink & Sing
51. Sky High Club
52. Limbo
53. Superchief
54. 33 Restobar
55. Hanine Beirut
56. The Little China
57. Big Mike
58. O Monoy Boutique Hotel
    O Monot Lobby bar
    O Monot Restaurant
    O Monot Rooftop
59. Roy Karaoke Club
60. Matador Café
61. Picasso Snack
62. Drip & Sip
63. Machawi el Azir
64. Mood Beirut
65. Falafel Tabouch
66. The Lemonade House
67. Mustafa Sahyoun
68. Falafel Sahyoun
69. Malak el Taouk
70. Thé/Café
71. Trio Café
72. Star Café
73. 17 Café
74. Otomatico
75. Théa Café
76. Fool w Aarnous



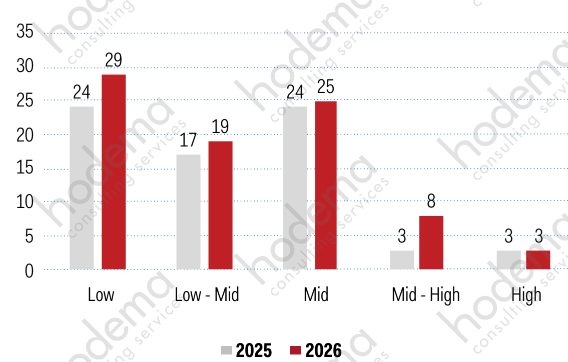
F&B outlets

71 IN 2025 **84** IN 2026

Number of F&B outlets per concept origin



Number of F&B outlets per positioning



Gemmayze *Steady, Sustainable, and Quietly Confident*

Gemmayzeh continues to solidify its position as one of Beirut's most established and resilient F&B destinations. Hodema counts a total of 110 outlets in the area this year, representing a 2.8% increase compared to last year and continuing a pattern of steady growth that has characterized the district since 2024-2025. This stability remains one of Gemmayzeh's defining strengths within Beirut's constantly evolving F&B market.

While neighboring Mar Mikhael historically dominated the city's dining and nightlife scene, Gemmayzeh has increasingly distinguished itself through more sustainable and measured growth. The district benefits from a balanced mix of restaurants, bars, cafés and lifestyle concepts, attracting both residents and visitors seeking a more mature and diversified experience. This balance between long-established institutions and new openings has enabled Gemmayzeh to continue evolving without losing the identity that has made it one of Beirut's most recognizable F&B destinations.

The area is home to several of Beirut's most recognizable F&B landmarks, including Boozalb, Couqley, Paul, Import Export, Tabliyet Massaad, Torino, Dragonfly, Mayrig, Sip, Husk, and Ginette. Other notable concepts, such as Cyrano, House of Butlers, and Fred, continue to reinforce the neighborhood's reputation as a destination for both dining and nightlife social gatherings. The area is also home to Beihouse, recently ranked among the top five restaurants in the MENA region by the Middle East & North Africa's 50 Best Restaurants list, further reinforcing Gemmayzeh's culinary credentials.

The district continues to attract new investment and operators. Newcomers this year include Roselane, the franchise concept La Baguette de l'Entrecôte, and Fakhreddine, which opened a second location in Gemmayzeh following the long-standing success of its flagship outlet in Broumana. At the same time, Pasteur Street is emerging as one of the most dynamic pockets within the neighborhood. The lower section of the street has witnessed a noticeable increase in activity following the opening of the Maison Dada Hotel's Bistrot and Patronne, which has contributed to the area's growing visibility and commercial momentum.

While the overall market remains healthy, Gemmayzeh has also experienced a few setbacks. Brasseria by Premier Leisure ceased operations, while the associated hotel project was ultimately cancelled. Urbanista also closed its doors, although announcements regarding a potential return continue to circulate without any concrete reopening date. Despite these closures, the overall supply continues to grow, reflecting the district's ability to absorb market fluctuations and attract replacement concepts.

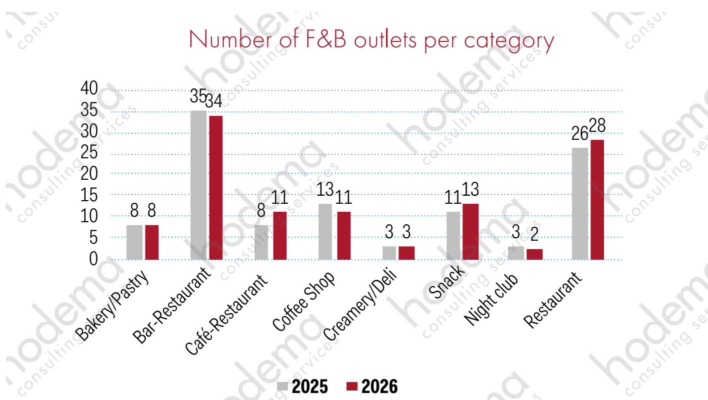
Gemmayzeh remains largely characterized by its bar-restaurant culture. The category accounts for 31% of the area's total zone supply, making it the dominant format within the district. However, this segment has been gradually declining over the past few years as the restaurant category continues to gain ground. The market appears to be shifting toward a more balanced dining offer, with restaurant concepts steadily increasing their share of the market. The strongest category growth this year was observed in the café-restaurant segment, which recorded the opening of three new concepts.

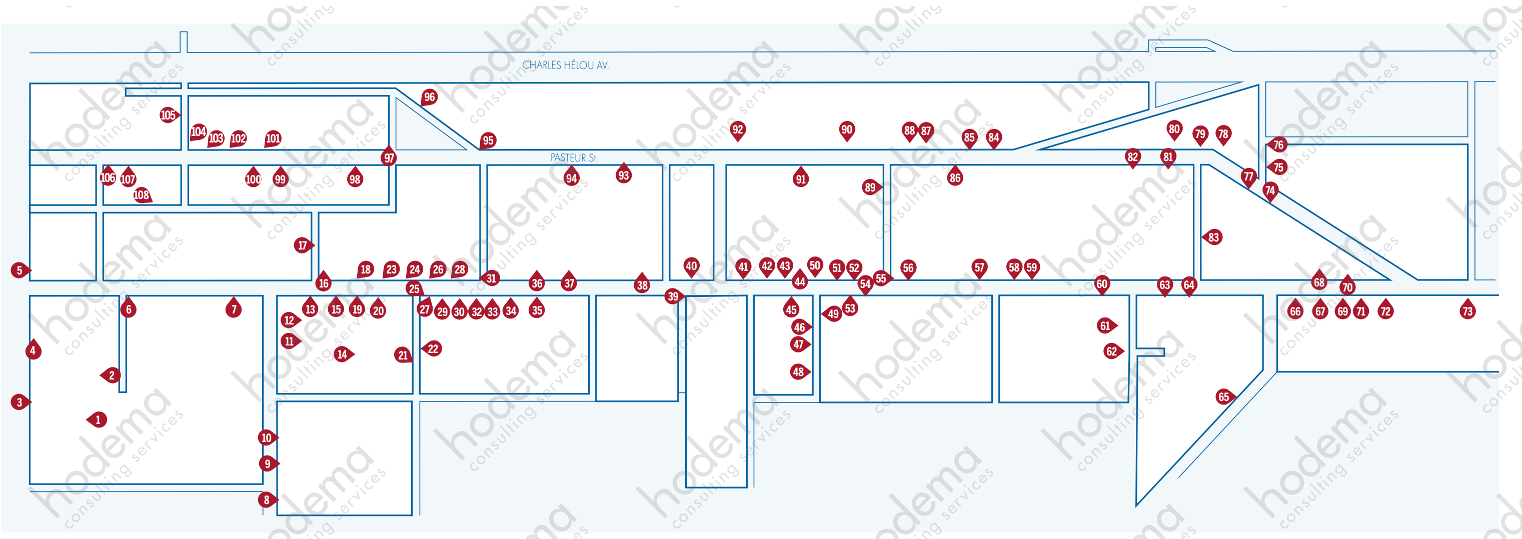
The district's culinary mix is also undergoing a gradual transformation. While international and European cuisines remain important pillars of the market, both categories have slowly declined in recent years. Meanwhile, American, Arabic, and Pan-Asian cuisines continue to gain momentum. American cuisine recorded the strongest growth in 2025–2026, doubling its presence through the opening of concepts such as Urban Onion, Bull Doggy, Gem Burger, and California Burger. This evolution reflects the growing popularity of casual dining and burger concepts among the area's clientele.

Pan-Asian cuisine also continues to strengthen its foothold within the neighborhood. With a total of 12 concepts, Gemmayzeh now records the highest concentration of Pan-Asian restaurants among all Beirut districts studied. The category is represented by a diverse mix of concepts, including Ramen Ya, Mitsu-Ya, Kami, and Norai, highlighting the district's continued openness to international culinary trends.

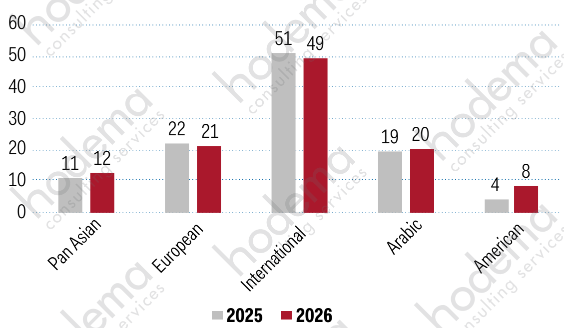
From a positioning perspective, Gemmayzeh remains largely driven by the low-mid and mid-end segments, which together account for more than 70% of the area's supply. The district records the highest number of mid-range concepts in Beirut, with a total of 37 outlets. The strongest growth this year was recorded in the low and mid-high segments. New openings such as Gem Burger and Shawarma Beirut contributed to the expansion of the low segment, while the mid-high segment also gained two new concepts. Together, these developments reinforce Gemmayzeh's ability to cater to a broad spectrum of consumers while maintaining a balanced and diversified market positioning.

As Beirut's F&B landscape continues to evolve, Gemmayzeh stands out as one of the city's most mature and dependable markets. Supported by steady growth, strong landmark operators, a diversified culinary offer, the district continues to strengthen its position as a destination that balances innovation with stability. While other areas may experience sharper fluctuations, Gemmayzeh's consistent growth suggests that it will remain one of Beirut's most attractive and enduring F&B destinations for years to come.

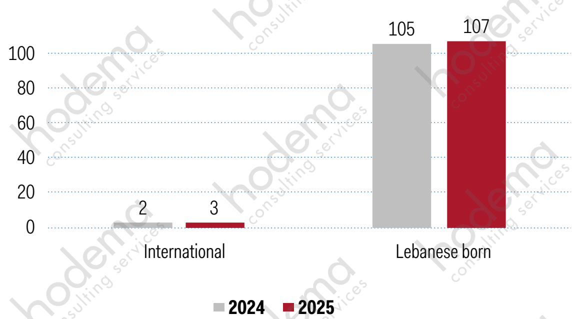




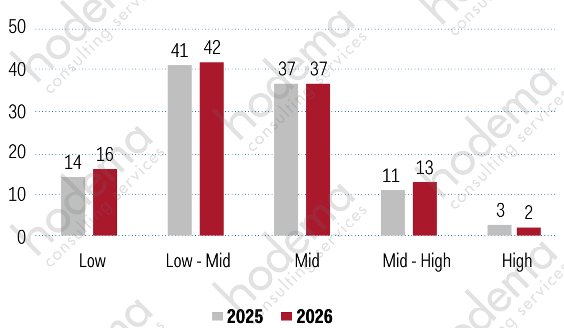
Number of F&B outlets per type of cuisine



Number of F&B outlets per concept origin



Number of F&B outlets per positioning



F&B outlets

106 IN 2025 **110** IN 2026

1. Centrale
2. Saifi Suites
   Epiqurus The Cigar Lounge
   Society Bistro
3. Fakhreddine
4. The Wine Haven
5. Paul
6. Booza Lb
7. Bull Doggy
8. Furn Merchak
9. Demo
10. Furn Wala Atyab
11. Gem Burger
12. Café Andalusia
13. Levant
14. Arthaus Kitchen
15. Shawarma Beirut
16. Dar Beirut
17. Snack Hayek
18. Kami
19. Ovi
20. The Glow Paradise
21. Botaniste
22. Fred Kitchen & Bar
23. Swiss Butter
24. Oakberry Açaí
25. Bn
26. Ramen Ya
27. Zii Flower Bar
28. Yakiniku
29. Torino
30. Dragonfly
31. Tabliyet Massaad
32. La Burrateria
33. Mitsu-Ya
34. Neighborhood Coffeeshop
35. Norai
36. The Plub
37. Pub 22
38. Salata
39. Standard Café and Bar
40. 16mm
41. Good Thing
42. Pizza Guys
43. Slot
44. SIP
45. Le Chef
46. Hale
47. Bavaglino
48. The Grand Meshmesh Hotel Café
49. Un Peu Fou!
50. Lost Bar
51. The Warrior's Brew
52. La Baguette de L'Entrecôte
53. Lost Pizzeria
54. Ginette
55. Latté Art
56. Moons
57. Paulie's
58. Munchease
59. Gou
60. The Barn
61. Couqley
62. Mavia's Bakery
63. Import Export
64. Furn Ghattas
65. Mama in Cuccina
66. California Burger
67. Kibbe Kitchen
68. Kassab
69. Kogowa
70. Saj Beirut
71. Ciawarma
72. Tequila
73. Orso Bianco
74. Phil & Will
75. Baked in Beirut
76. Coffeetastic
77. Urban Onion
78. Furn Saadeh
79. Cyrano
80. Mayrig
81. Escobar
82. Maia
83. Beit Toureef
84. Paloma
85. Lucylu
86. El Pastor
87. Kahwet 60
88. Bar Nouveau
89. Roselane
90. Loris
91. House of Butlers
92. Beihouse
93. Squisito
94. Coin Pasteur
95. JM Dîner-Concert
96. Mondays Off
97. Drop Social
    Futo Mama
98. Pop-Up Icecream
99. SLD bar
100. Mii Yao
101. Maracaï
102. Patronne
103. Tappo
104. Momaki
105. Son of a Bar
106. Husk
107. Maison Dada - Bistrot
108. Le Petit gris

Downtown *Awakening District*

After several years in the shadow, a part of Downtown Beirut is finally experiencing a long-awaited revival. The district is recording one of the most significant recoveries of any F&B zone in the city, with supply increasing by 43.8% compared to last year—the highest growth rate among all areas surveyed. Hodema counts 46 operating establishments in the zone in 2025-2026, up from 32 in 2024-2025. This trajectory reflects a broader shift in market perception and renewed investor confidence in a district that had long struggled to regain its pre-crisis vitality.

The resurgence is largely anchored in Beirut Souks, which alone accounts for 18 of the zone's 46 outlets, nearly 40% of the total offer. As noted in Hodema's 2025 F&B report, the revival of Beirut Souks has been the primary engine behind Downtown's recovery, steadily attracting both retail and food and beverage brands. The return of big operators and well-known names has marked a tangible shift in the area's appeal, with the opening of Eataly continuing to generate considerable buzz. New additions to Beirut Souks this year include Lakrids by Bülow—which is simultaneously expanding across multiple zones—Kfé, Fro.U, and Jazzmin Café, bringing further variety to an already strengthening cluster. Beyond the Souks, notable openings elsewhere in the zone include L'Avo, Syrian chocolate maker Ghraoui, and Gossip.

The district also continues to be anchored by several of Beirut's landmark destinations, including Paul, Clap, Capitole by Analogue, Skirt, People's, and Spinneys Signature F&B outlet, all of which contribute to Downtown's appeal as both a dining and lifestyle destination.

Access to Place de l'Étoile and its adjacent streets has been reopened, though the area remains largely inactive in terms of F&B and retail activity. More promising are the longer-term developments underway: Uruguay Street has been commissioned to a developer, a master plan for Maarad Street is currently under discussion, and the opening of the Zaha Hadid building—owned by Solidere and leased to Aïshti, which will relocate its existing Downtown department store to the new structure—is expected to inject further energy and footfall into the district.

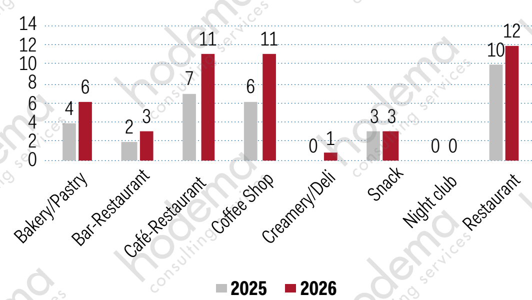
By category, restaurants remain the slightly dominant segment, representing 26% of the outlets tracked. However, café-restaurants and coffee shops are closing the gap rapidly, each now accounting for 23% of the total offer following growth of 57% and 83% respectively—the two fastest-growing categories in the zone. Snack outlets and bar-restaurants, by contrast, have stagnated, pointing to a Downtown that is increasingly oriented around daytime dining and casual all-day concepts rather than nightlife.

In terms of cuisine, European offerings more than doubled between 2024-2025 and 2025-2026, rising from 4 to 9 outlets—a 125% increase—driven by openings such as Maison D and Gossip. Arabic cuisine also expanded significantly, with the arrival of several oriental-style coffee shops and café-restaurants, including Café Em Karim, Downtown Express, and Café La Capitale. Despite this growth across multiple categories, Downtown continues to record one of the lowest concentrations of Pan-Asian cuisine among all studied zones, with just one concept currently operating in the area, Obi.

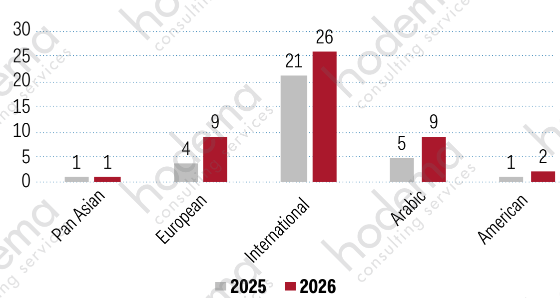
Positioning-wise, growth has been broad-based, with almost all segments recording an increase. The low-end segment saw the most significant expansion, more than doubling from 3 to 7 outlets driven by new openings around Foch and Uruguay streets, including Kfé, Downtown Express, and Café La Capitale. Mid-range concepts, which already represent the largest share of the offer at 36%, grew by a further 55%, with new additions including Sucasu, Santi Society, and Jazzmin Café reinforcing the zone's accessible positioning. The sole segment to remain unchanged is the high-end, which held steady with Capitole by Analogue and Clap as its two anchor concepts.

Downtown's recovery is real, measurable, and accelerating. With 46 outlets, a 43.8% growth rate, and a pipeline of urban development projects still to materialize, the district is steadily reclaiming its place on Beirut's F&B map—one opening at a time.

Number of F&B outlets per category

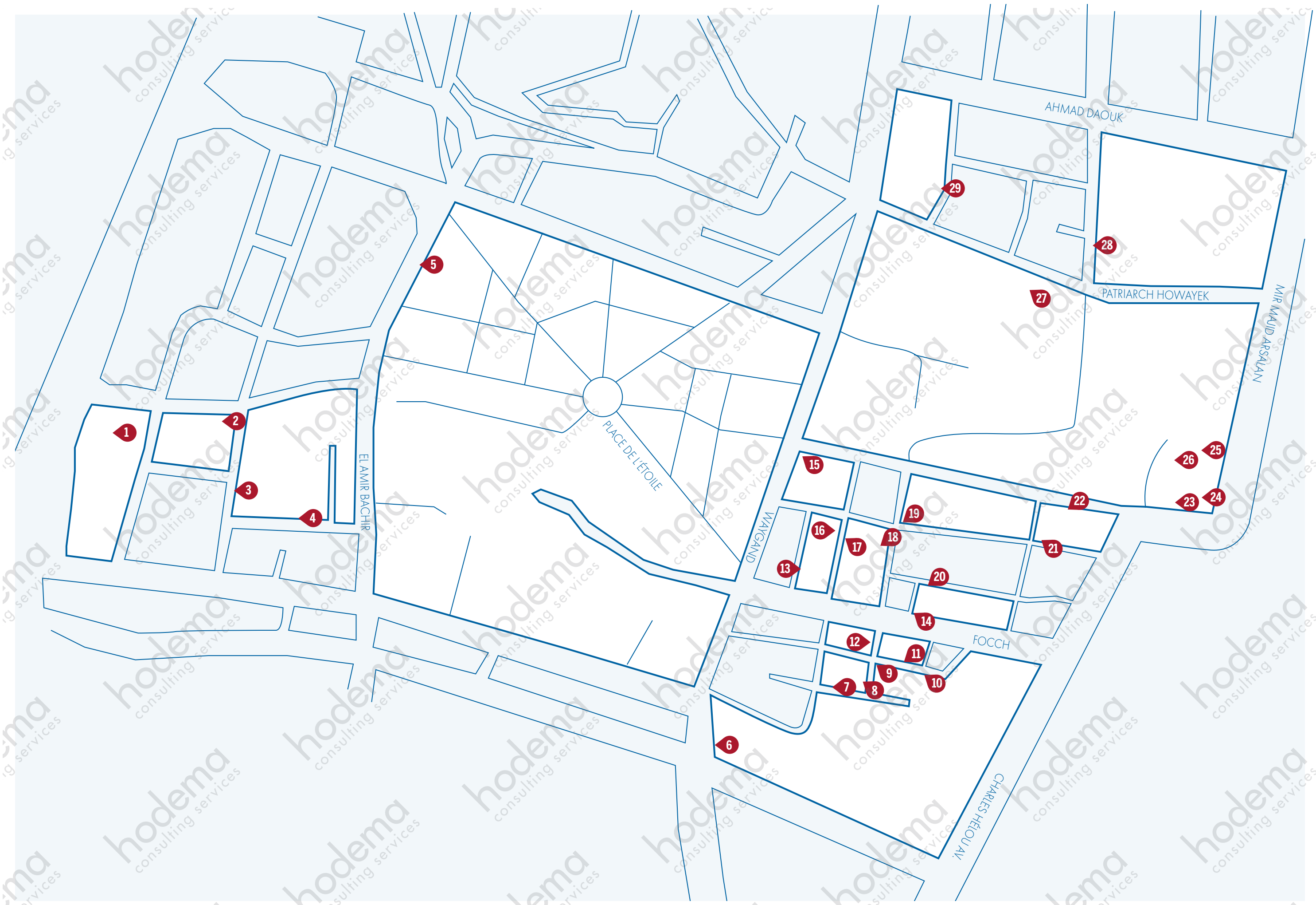


Number of F&B outlets per type of cuisine



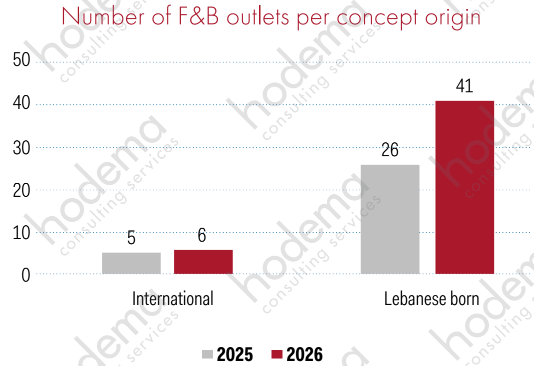
F&B outlets

32 IN 2025 **47** IN 2026

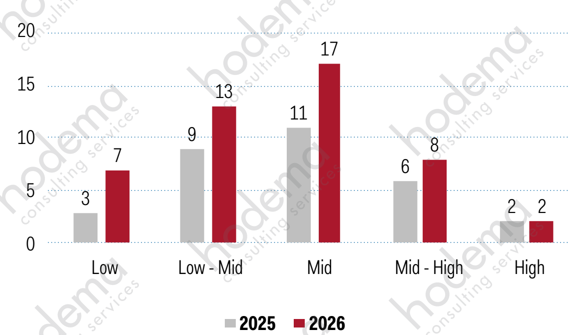


1. Cee
2. Blossom Sage Markazia
3. Maatouk Maison du Café
4. Café La Capitale
5. Capitole by Analogue
6. Clap
7. Casanova Café
8. Café Em Karim
9. Chez Beyrouth
10. Afif Café
11. Fiber
12. Downtown Express
13. Kalm
14. Ghraoui
15. Patchi
16. Scrolle
17. Gossip
18. People
19. Paul
20. Santi Society
21. Sucasu
22. Läderach
23. Amaleen DT
24. Zad Al Bahr/Zad Bey
25. Café Centre Ville
26. Maison D
27. Beirut Souks
    Al Antabli
    Grid
    Lézard Noir
    Spinneys Signature
    Starbucks
    Beit Sara
    MRKT
    Eataly
    Obi
    Crepaway
    Sourdough
    dipndip
    Dunkin'
    Someday in Beirut
    Lakrids by Bülow
    Kfé
    Fro.U
    Jazzmin Café
28. L'Avo
29. Skirt

Number of F&B outlets per concept origin



Number of F&B outlets per positioning



Saifi Village *Small in Size, Strong in Character*

Saifi Village continues to strengthen its position as one of Beirut's most attractive and successful F&B destinations. Despite its relatively small footprint, the area has developed into a dense concentration of restaurants, cafés, and lifestyle concepts, benefiting from its pedestrian-friendly environment, architectural character, and central location. Hodema counts a total of 25 outlets in the zone this year, representing a remarkable 38.9% increase compared to last year. While the number of establishments remains modest due to the limited surface area available for development, the district is densely occupied, with almost all outlets located at street level, creating a vibrant and highly visible dining environment.

The success of Saifi Village can largely be traced back to Solidere's decision to reduce rental rates several years ago, a move that attracted a new wave of operators and helped transform the district into one of Beirut's most prominent F&B destinations. Today, the area has firmly established itself as a sought-after address for both operators and consumers, supported by landmark venues such as Meat the Fish, The Backburner, and Paname, which have played a significant role in shaping the district's identity and attracting footfall. With its predominantly mid- to high-end positioning and strong concentration of European-style concepts, Saifi Village has become one of the city's most desirable dining addresses.

The area continues to attract new concepts despite its limited availability of commercial space. Eight new openings were recorded over the past year, including Les Chats du Quartier, Céline, Dupain, and Suki, among others, all of which reinforce Saifi Village's positioning as a destination for quality dining and café experiences. The district recorded only one closure during the same period, Julienne x Vieux Quartier. The location has since been taken over by Albé, a high-end Lebanese restaurant concept originating from Barcelona, marking the latest evolution of one of the area's most prominent addresses. This limited level of turnover highlights the strength of the location and the sustained performance of operators within the district.

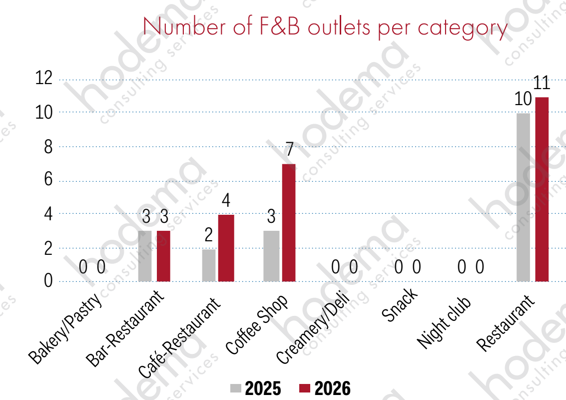
Saifi Village is particularly known for its strong European influence. International cuisine dominates the market with 13 outlets and is followed by European cuisine with 8 outlets. In contrast, Arabic cuisine remains limited to only two establishments, namely Maryool and the newly opened Albé, while Espresso Lab represents the area's sole American-style concept. The district's focused culinary mix contributes to its distinct positioning and curated atmosphere.

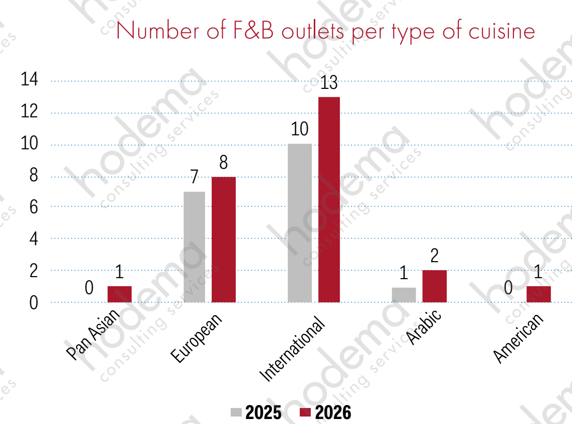
The area's category mix reflects its positioning as a restaurant-driven destination. Restaurants account for nearly half of the total supply, with 11 outlets. Coffee shops form the second-largest category, representing 28% of the offer. This segment expanded notably over the past year, increasing from three to seven outlets with the addition of Espresso Lab and Mouv x The Brunch Club. Other categories remain relatively limited, with no dedicated creameries, snack outlets, or nightclubs present within the district.

Positioning-wise, Saifi Village distinguishes itself from many other Beirut districts through its absence of low-end concepts. The market is largely concentrated in the mid-range 64% and mid-high segments 28%, which account for and of the total offer, respectively. This positioning aligns with the area's image as a premium yet accessible destination, catering to a clientele seeking quality dining experiences within a well-designed urban environment. At the upper end of the market, Burgundy remains the district's sole high-end concept.

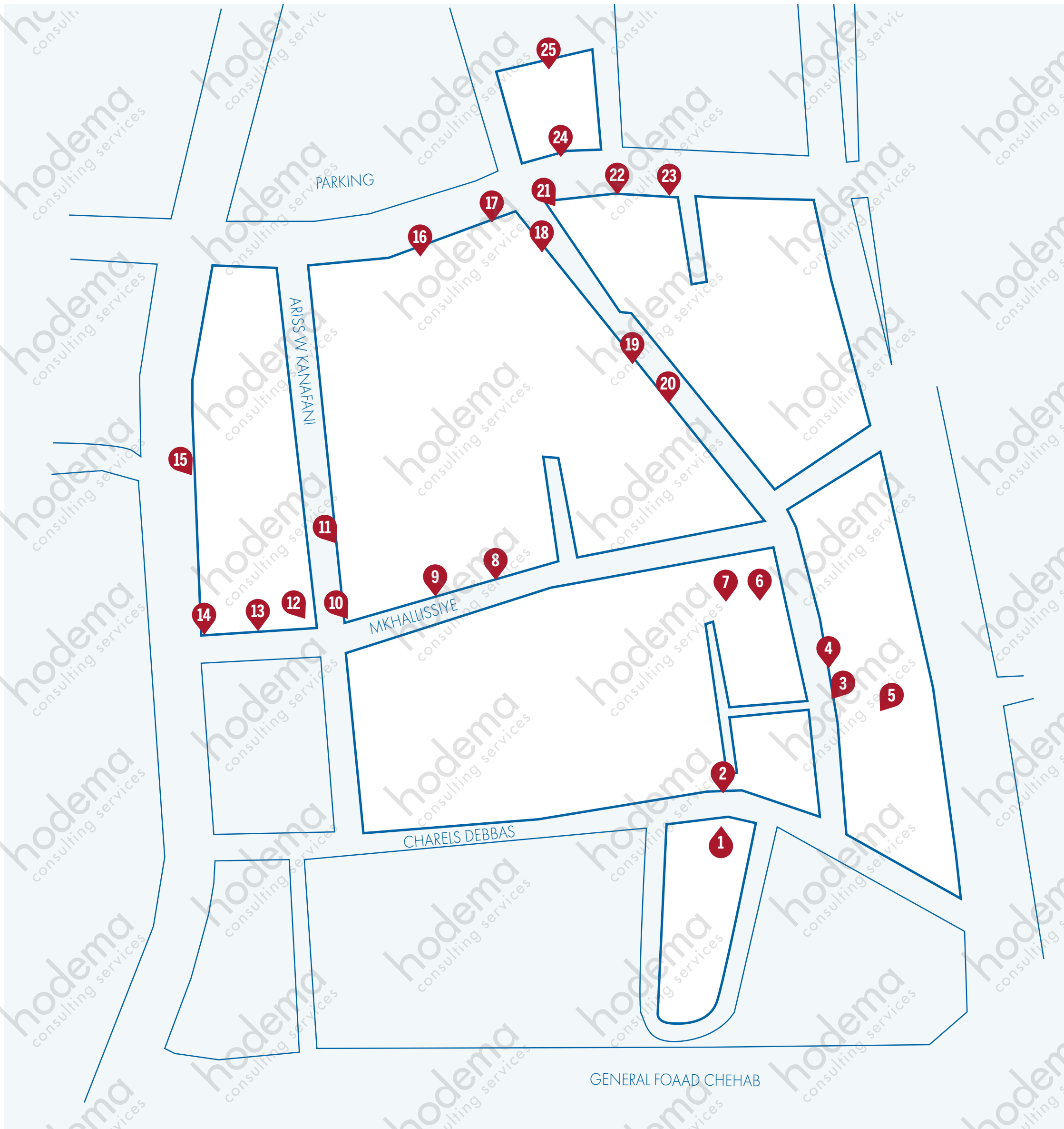
Despite being nearly saturated, the area continues to generate demand from both operators and consumers, leading developers and investors to look beyond its current boundaries. The natural extension of this increasingly crowded district is expected to take place through the development of District S, a major project that will accommodate over 40 retail and F&B outlets. In parallel, a new hotel designed by Gregory Gatserelia is set to open in the area, bringing with it two new F&B concepts: Slate, relocating from Mar Mikhael, and Avenues, which will relocate from Park Avenue. These additions are expected to further strengthen Saifi Village's position as one of Beirut's most dynamic and desirable dining destinations.

Combining a strong European identity, a carefully curated mix of operators, and a highly walkable urban environment, Saifi Village has successfully evolved into one of the city's most established F&B clusters. With continued investment, limited vacancies, and future developments already underway, the district appears well-positioned to maintain its momentum in the years ahead.

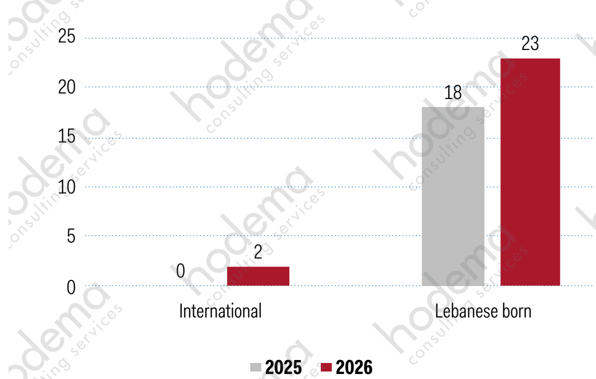




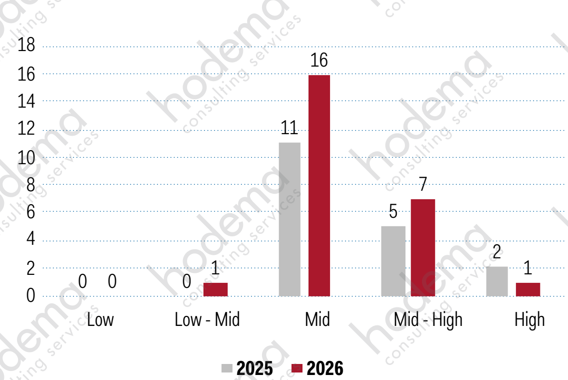
1. Riccello
2. L'Entrecôte de Paris
3. Les Chats du Quartier
4. Base Coffee
5. Miel
6. Maryool
7. Paname
8. The Core
9. Meat the Fish
10. Malibou
11. The Backburner
12. ROFF
13. Dupain
14. Suki
15. Mouv × The Brunch Club
16. Celine
17. Buco
18. Vicoli
19. Villa Clara La Table
20. Villa Clara Le Comptoir
21. Albé
22. Burgundy
23. The Malt Gallery Experience
24. Pyrk
25. Espresso Lab



Number of F&B outlets per concept origin



Number of F&B outlets per positioning



F&B outlets

18 IN 2025

25 IN 2026

Downtown's Park Avenue

Ritz, Glitz, and a New Layer of Accessibility

Park Avenue continues to strengthen its position as one of Beirut's most leading premium F&B destinations, benefiting from a combination of established operators, new developments and increasing commercial activity. Hodema counts a total of 61 outlets in the area this year, representing a 19.6% increase compared to last year and one of the strongest growth rates recorded among all Beirut districts. This growth has been largely driven by the continued momentum of Starco and the emergence of Arcadia, a newly developed restaurant and café cluster that alone contributed six new outlets to the market.

The area maintains its distinctive "ritz & glitz" image, attracting lifestyle-driven concepts and a clientele seeking premium dining, social experiences and upscale casual venues. While Park Avenue has traditionally been associated with larger-format restaurants and established operators, recent developments have introduced a more diversified mix of concepts and formats. The Starco frontage, in particular, has benefited from the arrival of several new operators occupying smaller units than those traditionally found in the area, creating a more active and accessible streetscape. Arcadia has also played a major role in reshaping the district, bringing a series of new restaurant and café concepts to a site that previously served as a parking lot. While the cluster is positioned at a lower price point than the rest of the area, it has contributed significantly to increasing footfall and broadening the district's appeal.

Several notable openings have further supported the area's growth over the past year. Karim Arakji, through the Nothing but Love Group, launched Red Apples, one of Lebanon's first New York-style pizza-by-the-slice concepts, alongside The Pink Lady, a bagel-focused concept. Both concepts introduce a more casual and contemporary dimension to the district's offer.

One of the district's most notable success stories continues to be the Em Sherif corner. Following the strong performance of Em Sherif Café and Em Sherif Deli, the group is preparing to launch its third concept in the area, Em Sherif Burger, further reinforcing its presence and contributing to the growing activity around this part of the district. The area is also home to Lakkis Farms, which continues to perform exceptionally well and has established itself as one of the district's standout success stories.

The area also witnessed a few notable closures. Osaka, one of the long-standing operators within the district, ceased operations, while Darling Society also exited the market. Despite these departures, the volume of new openings has more than compensated for the losses, resulting in one of the strongest net growth rates among all zones studied.

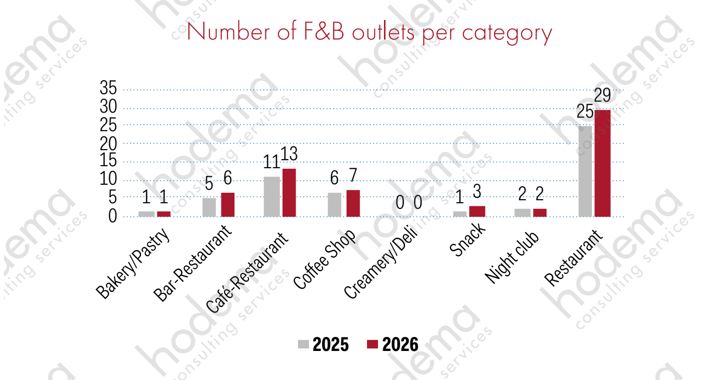
Restaurants continue to dominate the district, accounting for nearly half of the total supply. After experiencing a slight decline in 2025, the category rebounded strongly this year with a 16% increase. Café-restaurants remain the second most important category, reflecting the area's strong daytime activity and business-oriented clientele. Several other categories also recorded steady growth, including bar-restaurants, and coffee shops as well as café-restaurants with the addition of two new concepts. The district remains one of the few areas without any creamery concepts.

Although Park Avenue has traditionally been perceived as a dining and lifestyle destination rather than a nightlife hub, signs of a gradual shift are beginning to emerge. The presence of Music Hall and Mandoline within Phoenicia Hotel already contributes to the area's evening appeal, while the growth of the bar-restaurant category and the arrival of concepts such as Skoya suggest the district may be gradually strengthening its nightlife credentials.

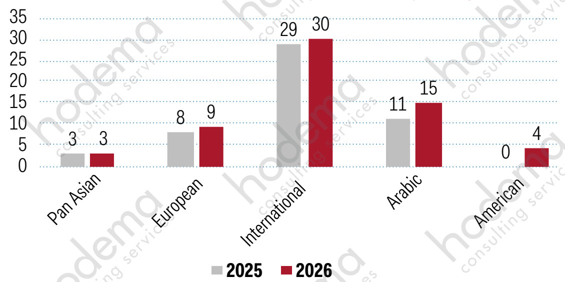
From a culinary perspective, international cuisine remains the dominant category within the area. However, several other cuisines are gaining momentum. Arabic cuisine recorded the strongest growth this year, increasing by 36%, bringing the total number of Arabic concepts to 15. American cuisine also experienced significant growth, particularly considering that no concepts in this category were present in 2025. The addition of Urban Cup, The Pink Lady, Red Apples, and Chops Diner has introduced a new layer of casual American-inspired dining to the district and reflects the broader diversification of the area's offerings.

Positioning-wise, Park Avenue is primarily a mid-market destination, accounting for 51% of the total F&B offer, while the low-mid and mid-high segments each represent around 21% of the market. Low-end and high-end concepts remain limited, each accounting for just 3% of the total supply. The district's mid-market positioning has strengthened steadily over the past two years, with the mid-end segment recording growth of 33% in 2024-2025, followed by a further 29% in 2025-2026. This evolution has enabled Park Avenue to broaden its customer base while preserving the upscale image that has become one of its defining characteristics.

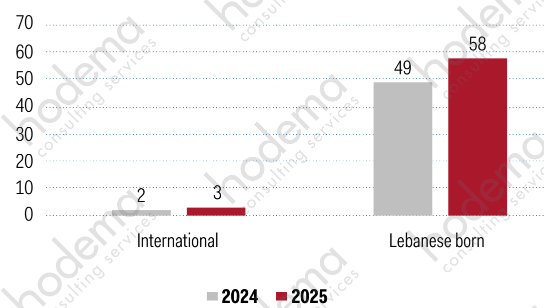
Driven by the continued success of Starco, the emergence of Arcadia and the growing momentum of key operators such as the Em Sherif Group, Park Avenue is entering a new phase of development. Combining premium positioning, strong commercial activity and one of the highest growth rates in the city, the district continues to establish itself as one of Beirut's most attractive and rapidly evolving F&B destinations.



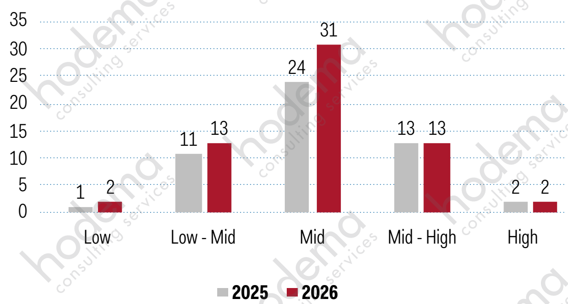
Number of F&B outlets per concept origin



Number of F&B outlets per type of cuisine



Number of F&B outlets per positioning



F&B outlets

51 IN 2025

61 IN 2026

1. Voco Beirut Central District
   Atrio Restaurant
   Invita Bar & Cigar Lounge
2. Phoenicia Hotel
   Amethyste Lounge
   Cascades Lounge
   Mosaic Restaurant
   N Café (Noura)
3. Mandoline the Club
4. Beirut Way
5. Lakkis Farm
6. Blend
7. Sushi Star
8. Ai
9. Patchi Café
10. Arcadia
    Chops Diner
    Ilayya
    Capitale Café
    La Playa
    Hawa Beirut
    Skoya
11. Starco
    Music Hall
    US Coffee
    Urban Cup
    Galilée
    The Pink Lady
    Red Apples
12. Em Sherif deli
13. Scarlet (Ramada Hotel)
14. Le Sushi Bar
15. Amar Café
16. Starbucks Reserve
17. The Cabinet Liquor & Cigar
18. Léo la Terrasse
19. Avanti
20. Métropole
21. Bebabel
22. Café de Monaco
23. Gala
24. Kun
25. Thanna b Beirut
26. Mademoiselle
27. The Co's
28. Gavi
    Kampai
29. Seray
30. Al Beiruti
31. Noura
32. Lily's Café
33. Maison Prunelle
34. Cocteau
35. Pudra Café
36. Atelier1339
37. Plume
38. Joe & the Juice
39. Machrou3 Beirut
40. Casper & Gambinis
41. Em Sherif Café
42. Le Petit Café
43. The Cask & Barrel
44. Azmi
45. Merchak Beirut
46. House of El & N

Zaitunay Bay *Steady and Consistent*

Zeitunay Bay continues to stand apart from most of Beirut's F&B districts through its stability, consistency, and large-format operations. The zone counts 19 outlets in 2025-2026, one more than last year. Unlike many of the city's more dynamic and rapidly evolving districts, Zeitunay Bay experiences very limited turnover, recording only one closure and two openings during the year. The area is currently operating at near-full occupancy, reflecting the strong performance of existing operators, sustained demand, and the scarcity of available space.

Positioned along Beirut's waterfront, the district has established itself as a destination catering to a broad audience, ranging from families and tourists to business professionals and leisure visitors. While the area accommodates concepts across all positioning levels — from casual to premium — it functions primarily as a mass-market destination characterized by large venues, diversified offerings, and accessible dining experiences underpinned by strong brand recognition.

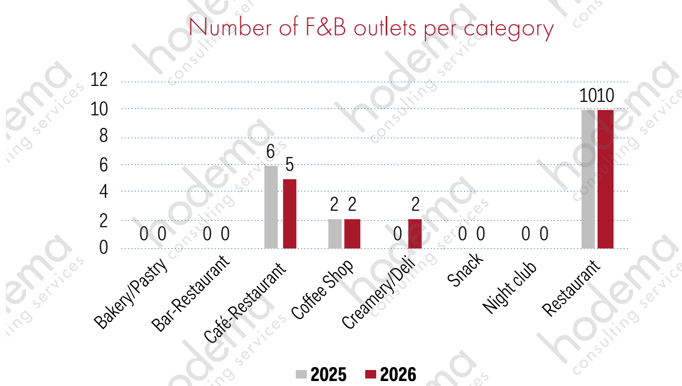
One of the defining characteristics of Zeitunay Bay is the presence of both local and international chains. International brands account for 16% of the area's supply, more than double Beirut's overall average of approximately 7%, highlighting the district's appeal to established operators seeking highly visible waterfront locations. The area is also home to several of Lebanon's leading restaurant groups, including Roadster Diner, Breakfast & Co., Premier Leisure through Cozmo Café, Em Sherif, Babel. Several landmark concepts continue to anchor the district, including Paul, Bartartine, Sea Café by Em Sherif, and Babel, contributing significantly to establishing Zeitunay Bay's reputation as one of Beirut's most recognizable dining destinations. Unlike many urban districts characterized by smaller venues and frequent concept turnover, outlets in Zeitunay Bay are generally large-format operations, with an average seating capacity of approximately 135 seats, allowing operators to accommodate high volumes of visitors throughout the year.

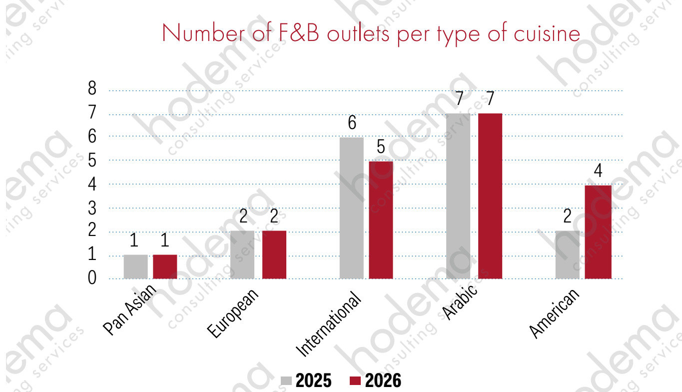
The area's category mix remains highly focused and has changed very little over recent years. Restaurants dominate the market with 53% of the total supply, while café-restaurants account for a further 26%. Creameries and coffee shops each represent 10.5% of the offer. Together, restaurants and café-restaurants account for nearly 80% of all outlets in the district, reinforcing Zeitunay Bay's position as a food-focused destination. The area does not host bakeries, bars, snack outlets, or nightclubs, making it one of the most specialized F&B clusters in Beirut.

From a culinary perspective, Arabic cuisine remains the dominant category, accounting for 37% of the total offer. International cuisine follows with 26% of outlets, while American cuisine represents 21% of the market. The overall cuisine mix has remained largely unchanged over the past year, with the most notable development being the addition of Pinkberry and Cheese on Top, which doubled the number of American cuisine operators from 2 to 4 outlets, further diversifying the area's offer and broadening its appeal.

Positioning-wise, Zeitunay Bay presents one of the most balanced market structures among the districts studied, accommodating concepts across multiple price points while maintaining a predominantly casual and accessible appeal. Several well-established mid-high concepts continue to anchor the premium end of the market, including Babel Bay, Le Pélican, and Em Sherif, a segment that remained unchanged over the past year. Similarly, the low and low-mid segments recorded no significant movement. The only segment to expand during the year was the mid-end category, which now represents 42% of total supply, reinforcing the district's orientation toward accessible, family-friendly concepts.

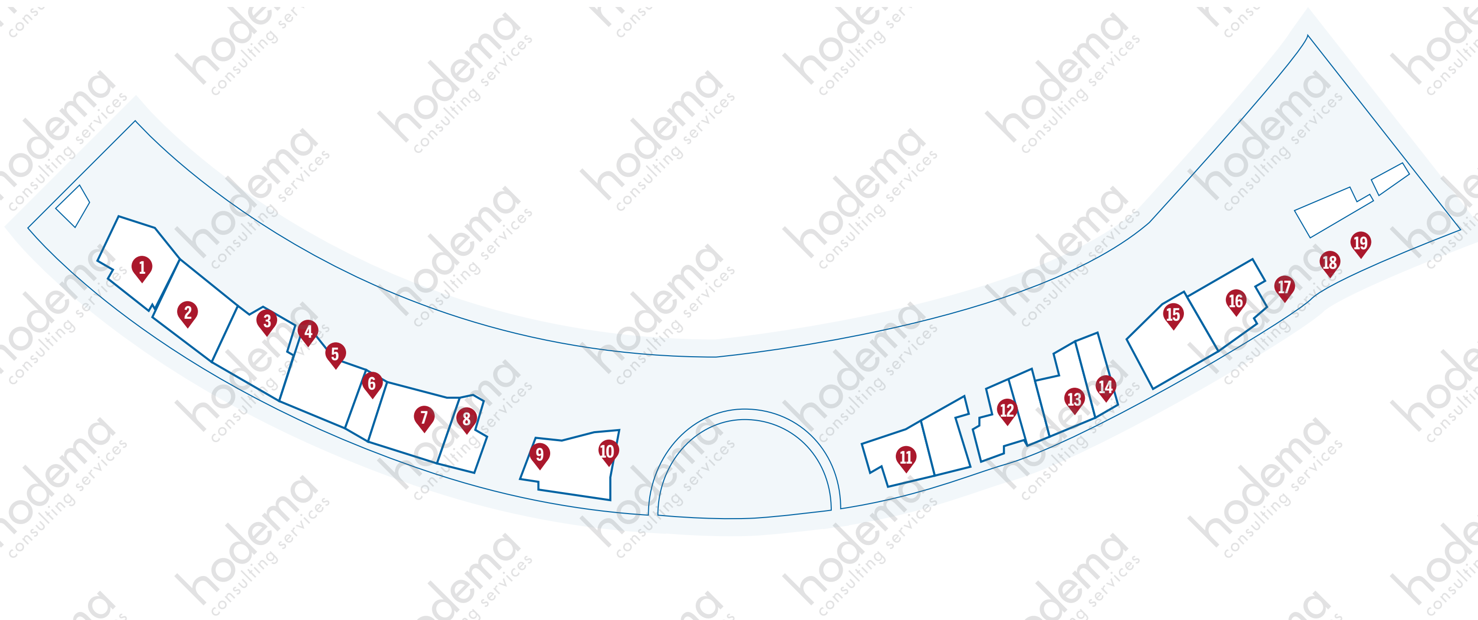
Unlike many of Beirut's trend-driven districts, Zeitunay Bay's strength lies not in rapid change but in consistency. Its combination of established brands, strong operator performance, large-format venues, and limited vacancy has created one of the city's most stable F&B environments, reinforcing its position as one of Beirut's most attractive waterfront dining destinations.





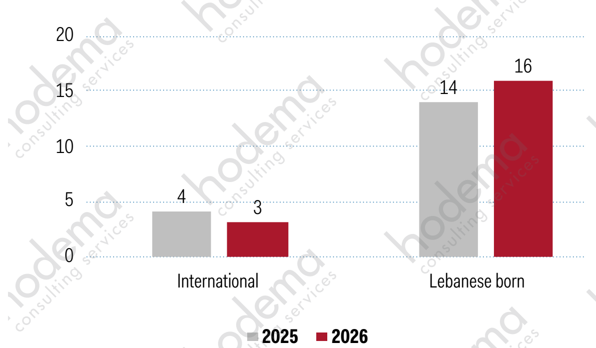
F&B outlets

18 IN 2025 **19** IN 2026

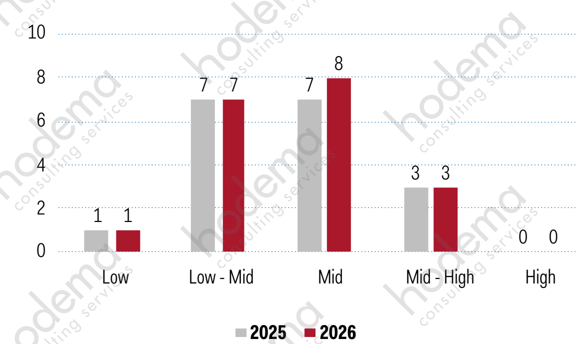


1. Em Sherif Sea Café
2. Leila
3. Roadster diner
4. Salma
5. Sushi Star by the Sea
6. Pinkberry
7. Appetito Trattoria
8. Zaatar w Zeit
9. Starbucks
10. Cheese on Top
11. Cozmo Café
12. Batchig
13. Bartartine
14. Paul
15. Ahwet Zeitouna
16. Babel Bay
17. Grid
18. Fattouh
19. Le Pélican

Number of F&B outlets per concept origin



Number of F&B outlets per positioning



Hamra *Constant Renewal, Timeless Identity*

Hamra continues to reinvent itself while preserving the character that has made it one of Beirut's most iconic urban districts. Hodema counts a total of 105 F&B outlets in the area this year, unchanged from last year. Behind this apparent stability, however, lies significant movement within the market, with 11 closures and 11 openings recorded over the past year. This constant renewal reflects Hamra's ability to adapt to changing market conditions while maintaining its position as one of Beirut's most active commercial and social destinations.

Long recognized as a day-to-night destination, Hamra continues to attract a diverse clientele drawn to its cafés, restaurants, pubs, and street-side dining venues. The neighborhood remains strongly characterized by independent operators, many of which have become institutions in their own right. Landmark concepts such as Café Younes, Jai, Salon Beyrouth, Mezyan, Kababji, and Ferdinand continue to anchor the district and demonstrate remarkable resilience despite successive waves of economic and market change.

One of the most notable developments this year was the arrival of Allo Beirut, the UAE-born franchise brand that has been expanding aggressively across the region. The concept occupies an entire building making it one of the most significant openings in Hamra in recent years. At the same time, Jai is planning a future expansion, further highlighting the confidence of established operators in the area's long-term potential.

The district also witnessed the closure of several notable operators. Among the most significant was the closure of the Commodore Hotel, which resulted in the exit of Benihana from the market. The departure of Benihana marked the loss of Hamra's last remaining mid-high concept. While this marks a shift away from premium dining, it also underscores Hamra's continued focus on affordability, accessibility and everyday consumption.

Hamra's offer remains heavily concentrated around restaurants, snacks and bar-restaurants, creating a highly diversified dining landscape that caters to a broad range of budgets and occasions. Snack outlets and restaurants each account for 23% of the total supply, making them the dominant categories within the district. Bar-restaurants follow closely behind, representing 19% of the market and remaining particularly concentrated along Makdessi Street, which continues to serve as one of Hamra's primary nightlife and social hubs.

Coffee shops also play an important role in the neighborhood's identity. In fact, Hamra records the highest number of coffee shops among all Beirut districts studied, with a total of 18 outlets. This segment, along with bar-restaurants, has continued to grow gradually over recent years, reflecting the district's enduring appeal as a gathering place for students, professionals, and residents alike.

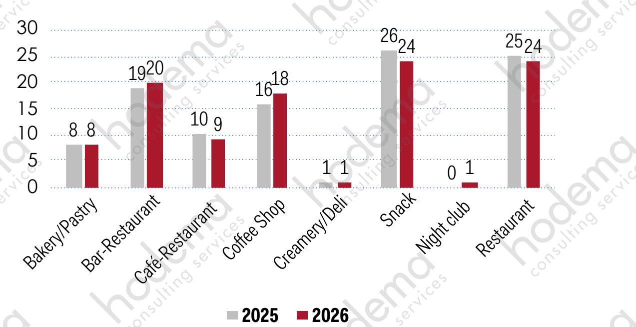
From a culinary perspective, international cuisine remains by far the dominant category, accounting for 54% of the area's total offer. Arabic cuisine follows with 34% of the supply and continues to strengthen its presence year after year. The category recorded growth of 38% in 2024-2025, followed by a stagnation in 2025-2026, highlighting sustained demand for regional dining concepts.

With a total of 36 Arabic restaurants, Hamra records the highest concentration of Arabic cuisine among all Beirut districts studied. Other cuisine categories either declined slightly or remain significantly less represented than international and Arabic concepts.

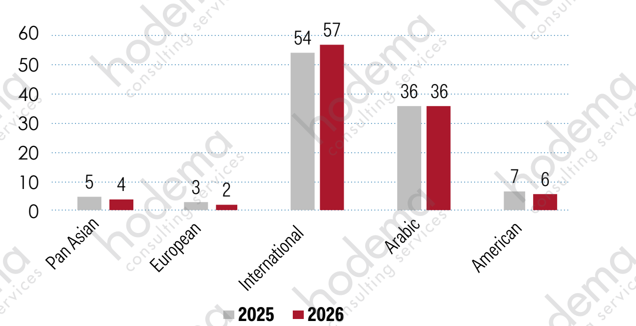
Positioning-wise, Hamra remains firmly rooted in the low and low-mid market segments, which together account for more than 90% of the district's total supply. This positioning aligns with the area's identity as an accessible, high-traffic urban destination serving a broad customer base. Most of the new concepts entering the market continue to target the lower end of the spectrum, with examples such as We Cup, Ya Leil Ya Ein, and Hooka Times further reinforcing this trend.

Despite the numerous changes it has experienced over the years, Hamra remains one of Beirut's most recognizable and enduring F&B destinations. Its combination of strong independent operators, high pedestrian activity, diverse culinary offer and constant renewal allows the district to continuously adapt without losing its identity. While its face may continue to change, Hamra's role within Beirut's dining landscape remains firmly intact.

Number of F&B outlets per category



Number of F&B outlets per type of cuisine

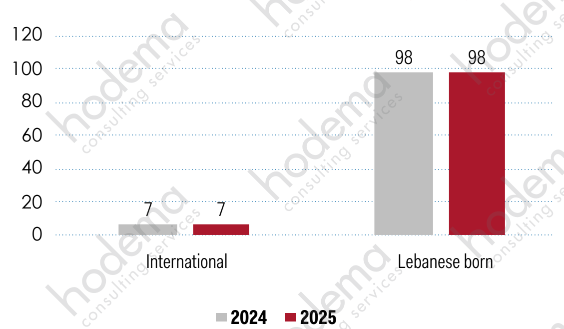


F&B outlets

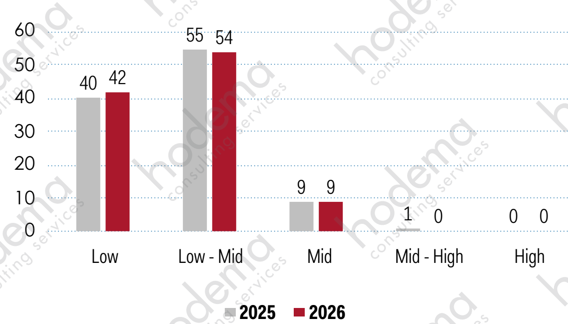
105 IN 2025 **105** IN 2026

1. Jai
2. Friendly Café
3. Vanilla Bean Bakery
4. Uncle Joe
5. Hamra Urban Gardens
   Bayt Em Nazih
   Pool D'Etat
6. The JaJa Chicken House
7. Bana Café
8. Kababji
9. Dunkin'
10. Kabset Zer
11. Rossa Café
12. Iraq el Kheir
13. Hani's Snack
14. Allo Beirut
15. Baghdadi El Iraqi
16. Café Al-Habayeb
17. Patchi
18. Hamra Juices
   Starbucks
   T-marbouta
19. Mezyan
20. Propaganda
21. Barmaison Café Bistro
22. Hamra Express Bar
23. Minto Music Lounge
24. Oregano
25. Zescobar Resto Pub
26. Tipsy Goose
27. Café Pavillon
28. Restaurant Fortina
29. Café Younes
30. Zaher Alroman
31. Lava Resto-Café
32. Le Roi des Frites
33. Popeye's
34. Snack Chehab
35. Zaher's Diner
36. Café Younes
37. Squish Burger
38. OHMAKI
39. B-Hive
40. Brimm
41. Espresso Lab
42. Lebanese Burger
43. Foul w Hommos abou Maryam
44. Shah
45. Ya leil Ya Ein
46. Sandwich w Noss
47. Crown Plaza Hotel
   Chopsticks
   Deek Duke
   Vivaldi
48. Snack Abou Mouzher
49. Dream Factory
50. Taverna Suisse
51. Boo Burgers
52. Crepaway
53. Al Kahwa
54. We Cup
55. Firefly Burger
56. Chahine Seafood
57. Zaatar w Zeit
58. Barjees
59. Tilt 33
60. Citizen Smith
61. Neighbours
62. Lat w aajn
63. London Bar
64. Ales & Tales
65. Rabbit Hole
66. Sushi Bell
67. Li-Beirut
68. Ferdinand
69. Chckn.Co
70. Duke of Wellington
71. D'coffee Shop
72. Booza Society
73. Raseef Beirut
74. RM
75. Tasty
76. Nougatini
77. At Bites
78. Pizzanini
79. Bayati
80. Pomegranate
81. Takkoush Bakery
82. Ka3kaya
83. Snack Takkoush
84. Monzer Café
85. Nagham Beirut
86. Burj Al Tayeb
87. T-mart
88. Terghalle
89. Furn Abdul Aziz
90. Asir Al Salam
91. 3al Lebnene
92. Shoppy
93. Furn Al-Makdissi
94. Golden Sheep
95. Praliné
96. Hooka Times
97. Salon Beyrouth
98. Special Bakery
99. Cascade
100. Falafel Abou el Ziz

Number of F&B outlets per concept origin



Number of F&B outlets per positioning



Badaro *Slowly but Surely*

Badaro continues to demonstrate resilience and stability within Beirut's F&B landscape. With Hodema counting 94 outlets in the area this year, compared to 91 last year, the neighborhood records a modest yet positive growth rate of 3.3%. While the pace of expansion remains slower than that of several other Beirut districts, Badaro has maintained a steady upward trajectory since the onset of the crisis in 2019, confirming its status as one of the capital's most stable and consistent F&B destinations.

Known for its relaxed atmosphere, tree-lined streets, and neighborhood appeal, Badaro continues to attract a loyal clientele seeking casual dining, coffee shops, and social gathering spots rather than high-energy nightlife venues. The area's central section along the main street and its adjacent roads remains the strongest-performing pocket of the neighborhood, driven by established operators such as Super Vega, Café Younes, and Newbury, which continue to generate strong footfall throughout the day. Several landmarks continue to contribute to the area's identity, including Witty Bun, Onno, Néo Café, and Mum & I, all of which have become synonymous with the neighborhood over the years.

Despite the overall positive performance of the zone, Badaro witnessed the closure of several notable concepts this year. Among the most significant losses were Patisserie Éclair, which closed following the passing of its founder, and La Pinède, both long-standing institutions that had been part of the neighborhood's identity for decades. The area also lost Lina's, Café Penelope, and Honey Mustard, while Kissproof, one of Badaro's most recognized landmarks, remains temporarily closed. Its anticipated reopening is expected to further contribute to the neighborhood's vitality.

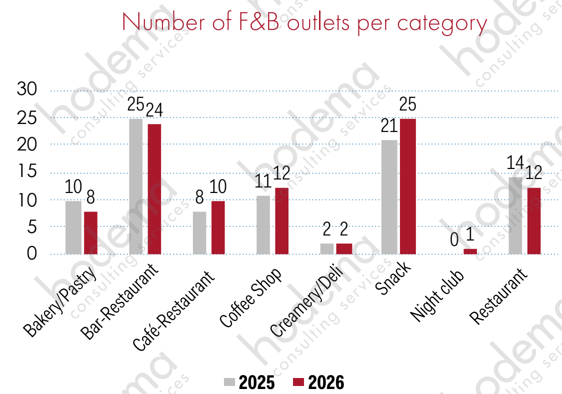
Among the year's major changes, Bistro Lobo opened in place of Lina's, notably backed by some of the same major shareholders behind Lina's and Abu'l Sim. Looking ahead, several developments are expected to further support Badaro's growth, including the opening of KUPP, a new burger concept next to Néo Café, and the expansion of Sift, which is acquiring the adjacent space. While expansion remains more measured than in several other Beirut zones, the neighborhood's overall trajectory continues to be positive.

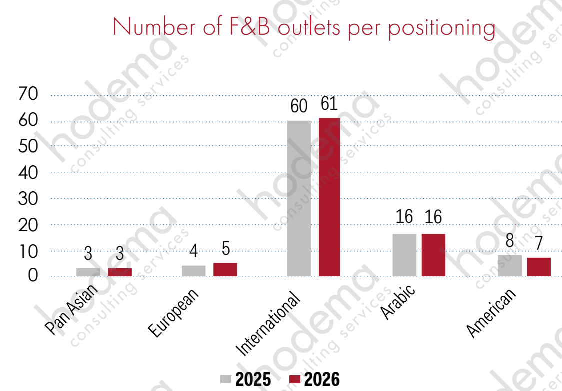
Badaro is increasingly becoming a daytime destination rather than a nightlife one. This trend is reflected by the strong growth of café-restaurants, which increased by 25% this year, as well as the continued expansion of snack concepts, up by 19%. Coffee shops also continued their steady progression, further strengthening the neighborhood's daytime appeal. Meanwhile, bar-restaurants recorded a slight decline. Consumers appear increasingly drawn to the neighborhood for casual meetings, remote work, coffee breaks, and daytime dining experiences rather than late-night entertainment.

International cuisine continues to dominate the area's culinary landscape, accounting for approximately 65% of the total supply and slightly increasing once again this year. European cuisine recorded one of the strongest recoveries in 2025-2026, supported by the opening of Noir Chocolate Coffee House, a patisserie, chocolaterie, and café-restaurant concept, as well as Pasta Station. The latter contributed to making European cuisine the fastest-growing category within Badaro this year. Most other cuisine categories remained stable or recorded slight increases, reflecting the neighborhood's generally balanced and mature market structure.

From a positioning perspective, Badaro remains firmly rooted in the accessible segments of the market. The neighborhood does not currently host any mid-high or high-end concepts, distinguishing it from several other Beirut districts. Low-mid-end concepts continue to dominate the area, representing around 56% of the total supply and reinforcing Badaro's reputation as an affordable and approachable destination. The mid segment welcomed several new additions this year, including Spin Society and Off Record, while also experiencing some departures, ultimately maintaining a stable overall share.

As Beirut's F&B landscape continues to evolve, Badaro remains true to its identity: a comfortable, neighborhood-oriented destination offering consistency, accessibility and a steady stream of new concepts without compromising the relaxed atmosphere that has made it one of the city's most enduring F&B hubs.

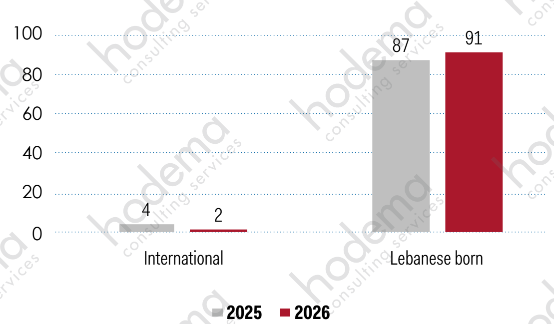




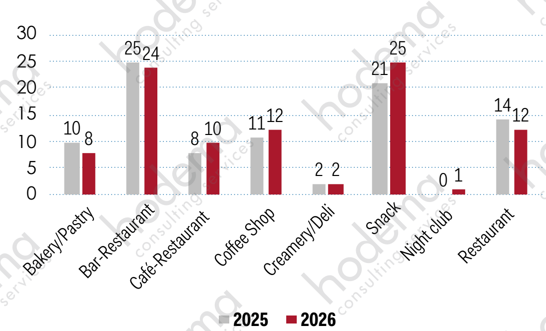
1. Snack El Mathaf
2. Mum & I
3. Le Marzipan
4. Pavilion Café
5. Smallville Hotel
   Da Sophia
   Meet Me Bar
   Spaceclub
   The Penthouse Club
   Marvelous Diner
   Stargaze
   The Pool House
6. Opporto
7. Molo
8. Kanaf
9. Patatoi
10. Bouquet Délicieux
11. Néo Beirut
12. Twist
13. By The Slice
14. The Number Eight
15. Biite Burger
16. Kudeta
17. The Witty Bun
18. Le Bon Point
19. Joe & the Grill
20. Spin Society
21. Third Wheel Bar
22. Zawiyat Farah
23. Off Record
24. Moka
25. The Protein Bar
26. The Old Fashioned
27. Crew Hut - Doodle Cup
28. Yellow.Coffeeshop & You
29. Katastrof
30. Notes Coffee Bar
31. Onno Bistro
32. Saj Nation
33. Cloudy Bites
34. Rendez-Vous
35. Concierge Coffee
36. Obi Sushi
37. Abu'l Sim
38. Happy Willow
39. Bistrot Lobo
40. Sofretna - Pamai Chop
41. Boteco
42. Skyvill
43. The Attic Bar
44. Açaí
45. Curl
46. Luca's
47. The Cavern Pub
48. Super Vega
49. Sift
50. Café Younes
51. Newbury
52. Roy's Public House
53. L'oven
54. Lennon
55. Pizzalata
56. Chez Fadi
57. Rusty Rose
58. Meshoir
59. Poke district
60. Cugina
61. Vagabond
62. Badaro Bakery
63. Mint
64. Poule d'Or
65. Al Zad Snack
66. Al Moualem
67. Chiban Snack
68. Le Chef Inn
69. Snack El Watan
70. Sneego Snack
71. Pasta Station
72. Coffee House
73. Blink
74. Al Baba Sweets
75. Sweet Industry

76. Maz
77. Café Badaro
78. Boneless
79. Sawani Falfoul
80. Noir Chocolate Coffee House
81. East Village
82. Lor Bistro
83. Community
Badaro
84. Bachir Ice Cream
85. Pizza Hut
86. McDonald's
87. Tannour w Saj
88. Café du Coin

Number of F&B outlets per type of cuisine



Number of F&B outlets per concept origin



F&B outlets

91 IN 2025

92 IN 2026

Verdun *Back in the Spotlight*

Verdun continues to strengthen its position as one of Beirut's most reliable commercial and F&B districts. With 80 outlets in the area this year compared to 68 last year, the neighborhood records an impressive yearly increase of 17.6%, making it one of the fastest-growing zones among those studied. Long regarded as a safe and established destination, Verdun is once again attracting renewed interest from operators and investors, reaffirming its status as a véritable valeur sûre within Beirut's F&B landscape.

Much of the recent growth has been concentrated within the area's two main commercial hubs, ABC Verdun and Dunes, which continue to drive new investment and consumer traffic. Dunes welcomed several notable openings this year, including Kiss the Spoon, Stories, and Poème, while Uncle Fluffy relocated from another location within Verdun to establish a stronger presence within the center. At ABC Verdun, a number of changes were recorded, most notably the opening of Momaki, a refreshed version of Mon Maki a Moi, further enriching the mall's culinary offering.

Several other notable concepts entered the area this year. Al Forno Gourmet, coming from Khaldeh, opened in place of The Cheesecake Factory, while Souchet launched its second location in a shared space with Rifai. The arrival of Swiss Butter reflects the brand's ongoing expansion strategy across Beirut. At the same time, Harkous Chicken made its first move into central Beirut through the opening of Crunchy Chicken & More, marking an important milestone for the brand after years of focusing on suburban markets.

Despite the arrival of numerous new concepts, Verdun continues to be anchored by long-standing landmarks. Amore Café remains one of the area's strongest performers and an iconic destination that continues to attract a loyal clientele. Shogun Lounge, the neighborhood's sole high-end concept, also remains a landmark within Verdun's F&B landscape, having maintained its presence and positioning for many years. Their enduring success reflects the stability and maturity of the Verdun market, where established operators continue to coexist alongside new entrants.

The neighborhood remains heavily oriented toward daytime activity. Unlike many other Beirut districts, Verdun has no nightlife offering, hosting no nightclubs and only a single bar-restaurant, The Lounge Bar at the Four Points Sheraton Hotel. Instead, the area thrives on daytime traffic generated by shopping, business activity, residential density, and family-oriented outings.

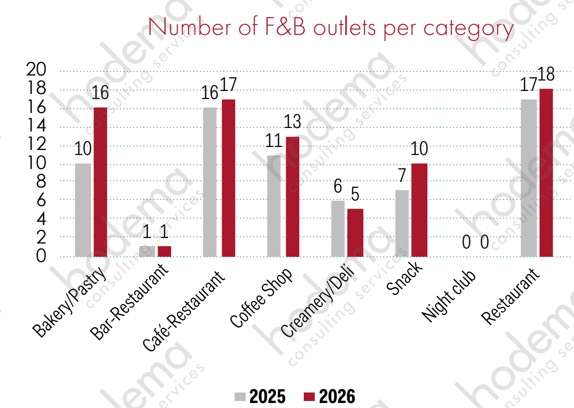
This positioning is clearly reflected in the area's category mix. Restaurants, café-restaurants, and bakery-pastry concepts continue to dominate the market and collectively account for the majority of the neighborhood's F&B supply. Café-restaurants alone now total 17 outlets, representing more than one-fifth of the overall offer and making Verdun the zone with the highest number of café-restaurants among those studied. Bakery and pastry concepts have been among the fastest-growing categories, with six new openings this year alone, including Caketime by Sugar Daddy and a second outlet for Uncle Fluffy, increasing the category's supply by approximately 60%.

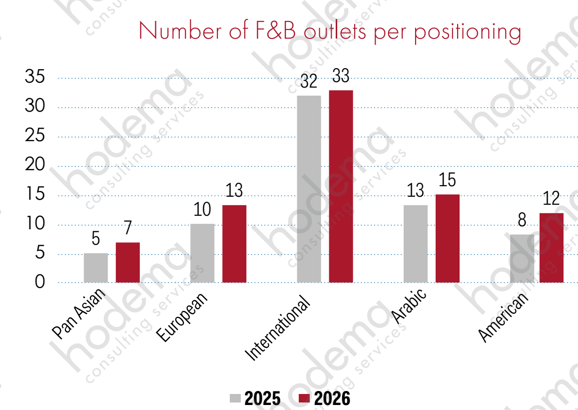
International cuisine remains the dominant culinary segment, accounting for 41% of the total F&B offer. All cuisine categories recorded growth this year, reflecting the area's expanding diversity. American cuisine witnessed one of the strongest increases, while European and Pan-Asian concepts also expanded significantly.

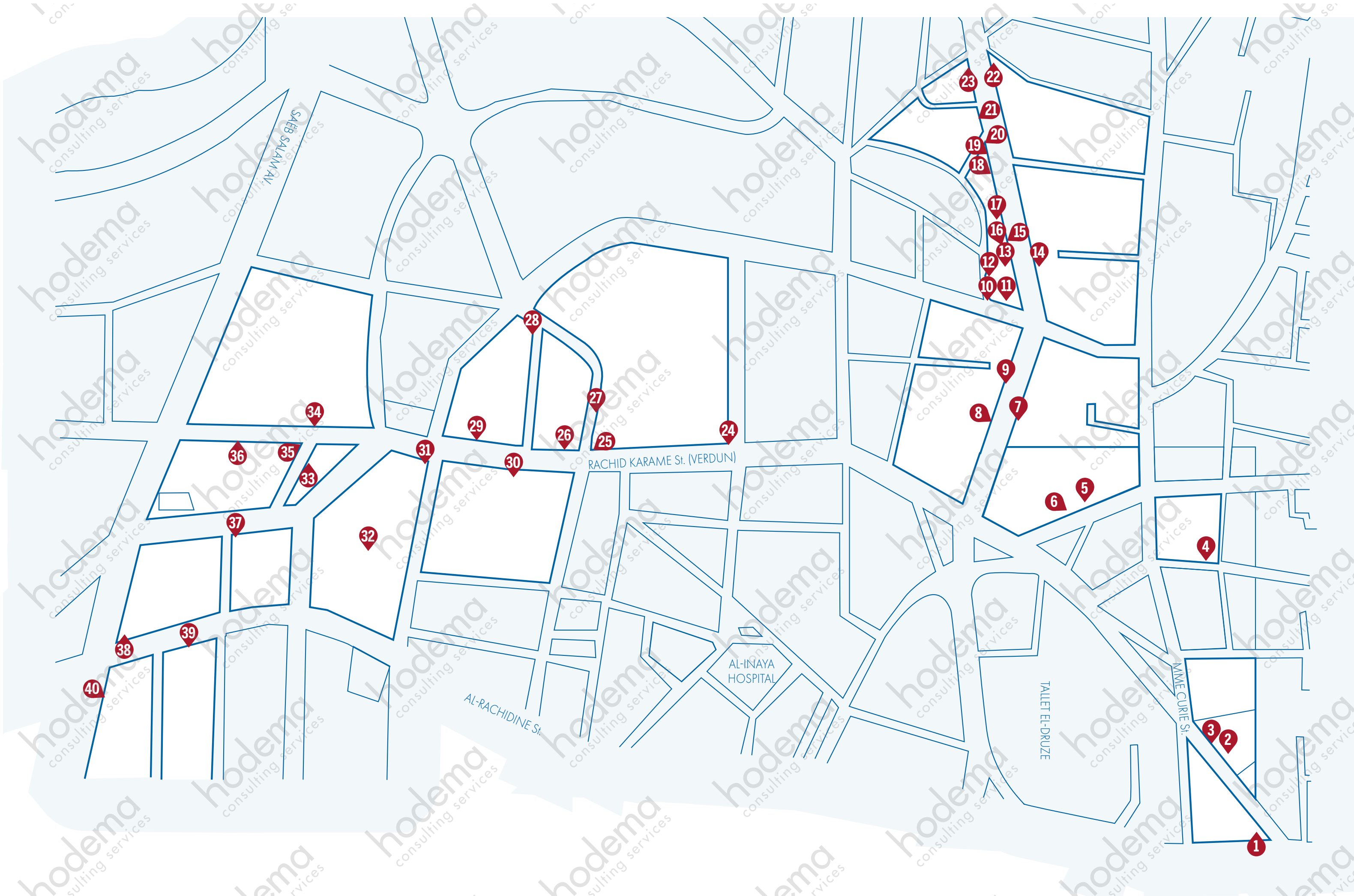
From a positioning perspective, growth was observed across nearly all market segments. The low-mid segment remains by far the dominant category within the area and recorded one of the strongest increases this year, growing from 33 to 40 outlets. The mid-end segment also continued its steady expansion, while the low segment benefited from the opening of concepts such as Saj Spot and Hattab Corner.

At the upper end of the market, the mid-high segment welcomed the arrival of Lakrids by Bülow and Souchet, both contributing to a growing premium offering within the neighborhood. However, Verdun remains largely absent from the luxury dining scene, with the high-end segment still limited to a single long-established concept, Shogun Lounge.

As investment continues to flow into ABC Verdun and Dunes and new concepts increasingly view the neighborhood as a strategic location, Verdun appears to be entering a new growth cycle. Combining strong daytime activity, a diverse culinary offer, and a stable consumer base, the area continues to reinforce its position as one of Beirut's most attractive F&B destinations.

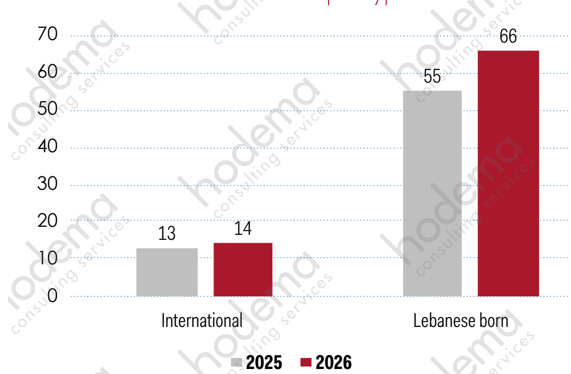




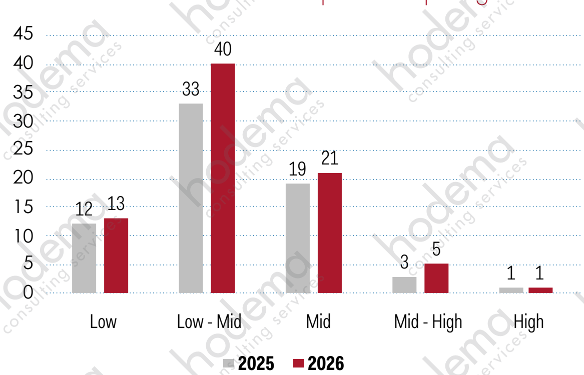


1. Snack El Jazeera
2. Concorde
   Café Nahreez
   Dweik Deli
   The Coffee Factory
3. Hookah Time
4. Hekam
5. Staybridge Suites Lobby Café
6. Swiss Butter
7. Karakna
8. Caketime
9. Samra Café
10. Azakir Snack & Shawarma
11. Pain D'or
12. Hiba & Nour
13. Juicy Frutti
14. Al Wazzan
15. Saj Spot
16. Sugar Daddy's/ Caketime
17. Al Baba Sweets
18. Qatch
19. Kahwet Koreitem
20. Amal Bohsali
21. Kteer Helou
22. Oslo
23. Urban Wellness
24. Goodies
25. Rifai/Souchet
26. Cannelle
27. Pâte à Choux
28. Kozz Café
29. Al Forno Gourmet
30. Verdun 732
    Amore
    Starbucks
31. Mashrabiya
32. ABC
    Burger King
    Caspresso Café
    Chatime
    Deek Duke
    Dunkin'
    Frooza Booza
    Illy Café
    Joe & the Juice
    Leila
    Lord of the wings
    Ni Caffé
    Patchi Café
    Paul
    Pop City
    Roadster Diner
    Starbucks
    The Glow Paradise
    Zaatar W Zeit
    Pinkberry
    Tavolina
    Sablés Gourmets
    Lakrids by Bülow
    Momaki
    Uncle Fluffy
33. Istanbuli
34. Dunes
    Bartartine
    Cookhouse
    Kiss the Spoon
    Mcdonald's
    Shogun to Go
    Stories
    The Shogun Lounge
    Uncle Fluffy
    Zaatar w Zeit
    Guilt Free Gelato
    Poème Chocolate
35. Soul Beirut Restaurant & Café
36. Verdun Plaza 2
    Khatoun
37. Ghazal
38. Four Point by Sheraton Hotel
    Le Patio Rooftop
    Lounge Bar
    Le Bistro
    Le Jardin International
    La Terrace
39. Cuisine Moumtaz
40. Crunchy Chicken & More

Number of F&B outlets per type of cuisine



Number of F&B outlets per concept origin

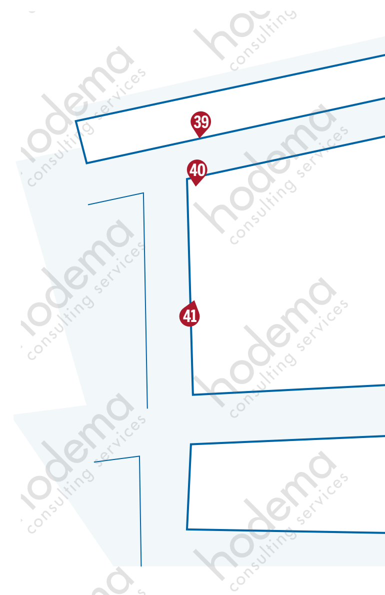


F&B outlets

68 IN 2025

80 IN 2026

Bliss *Beirut's Open-Air Food Court*



Centered around the American University of Beirut (AUB) campus and AUB Medical Center, Bliss benefits from a constant flow of students, faculty members, hospital staff, and visitors, creating one of the city's most active daytime markets. With 75 outlets this year compared to 68 last year, Bliss records a yearly increase of 10.3%, bringing the area close to its pre-crisis level in terms of F&B supply.

Unlike several other Beirut districts that have experienced significant transformations in recent years, Bliss witnessed no major structural changes in 2025-2026. Instead, the neighborhood continued to evolve organically, reinforcing the characteristics that have long defined its appeal. Affordable pricing, high footfall, quick-service concepts, and convenience remain at the core of the area's identity.

Several notable openings contributed to this year's growth. Among them is Mailo's – The Pasta Project, a fast-casual concept born in Athens that combines fresh pasta with street-food culture. The return of Marrouch was also noted, strengthening the area's Arabic food offering and bringing back a familiar concept long appreciated by the area's clientele. Together, these openings reflect the area's continued ability to attract concepts aligned with its fast-paced, affordable, and youthful customer base.

One of the clearest trends observed this year is the growing popularity of frozen yogurt and soft-serve concepts. The opening of Fro.U and the anticipated arrival of Pinkberry, already highly visible along the main street, illustrate the continued demand for affordable grab-and-go treats. These additions perfectly align with the neighborhood's fast-paced consumption patterns and reinforce the snack-driven culture that characterizes daily life in Bliss.

Long-established landmarks such as Bliss House, Fayssal, and Zaatar w Zeit continue to serve as stable anchors within the area. Their continued success reflects the consistency of the neighborhood's customer base and the enduring appeal of concepts that cater to students and commuters alike.

As has traditionally been the case in Bliss, most new concepts focus on Arabic and international cuisine, while more than half of the new openings fall within the snack category. This trend further reinforces the area's positioning as a practical, affordable and highly accessible destination catering to consumers on the move.

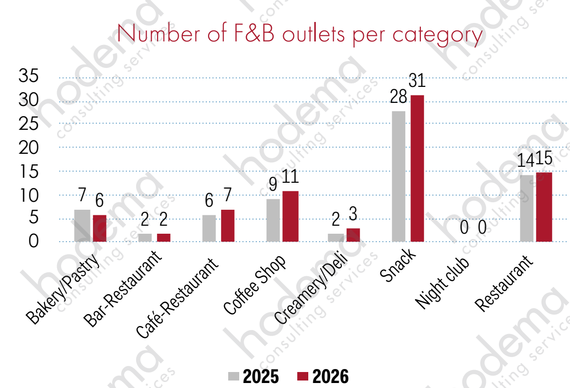
The category mix continues to reflect the needs of the surrounding community. Snack outlets dominate the area with a total of 31 concepts, representing 41% of the total supply and giving Bliss the highest concentration of snack concepts among all Beirut zones studied. Growth in this category has remained particularly strong over the past two years, driven largely by demand from students and visitors seeking quick, affordable dining options between classes, work or hospital visits.

From a culinary perspective, Arabic and international cuisines remain the dominant categories, each accounting for approximately one-third of the overall F&B supply. Both categories continue to record year-on-year growth. Pan-Asian cuisine also continues to gain momentum, expanding for another consecutive year through concepts such as Möge Tee, an international bubble tea brand, and Kogowa, a fast-food concept catering to the area's young consumer base.

Bliss remains firmly positioned within the lower end of the market, offering affordable pricing. The area records the highest number of low-end concepts among all Beirut zones, accounting for 61% of the total offer. This positioning remains one of the district's key competitive advantages, allowing operators to cater to a large and consistent customer base despite challenging economic conditions.

The low-mid segment also continues to expand, supported by the arrival of concepts such as Dough Delights Bakery and Bliss Lounge. Meanwhile, no mid-high or high-end concepts operate within the area, reflecting the neighborhood's clear focus on affordability, accessibility and high-volume foot traffic.

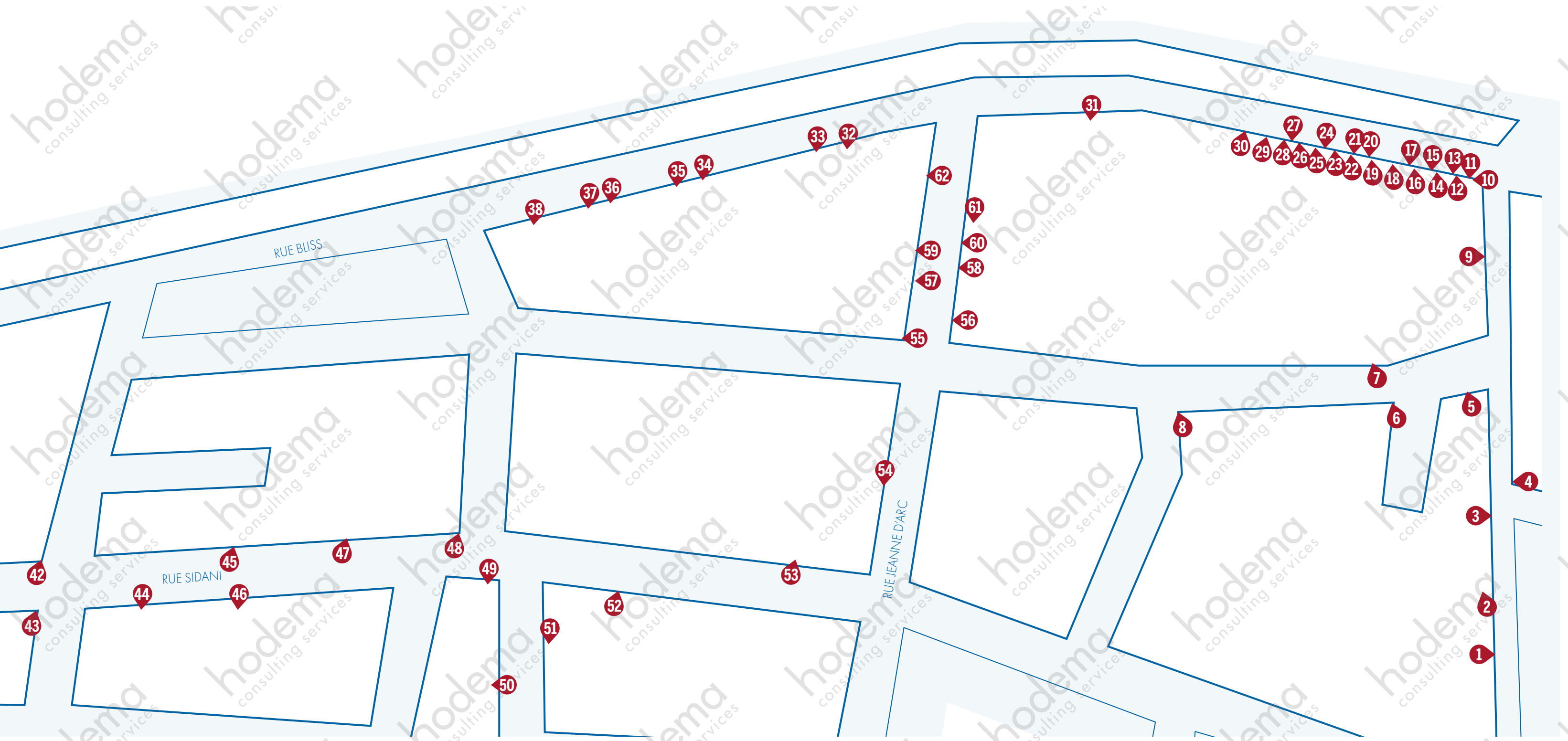
With its strong student base, resilient demand, and growing selection of snack-oriented concepts, Bliss continues to reinforce its position as Beirut's leading university district and one of the city's most active destinations for affordable, everyday dining.



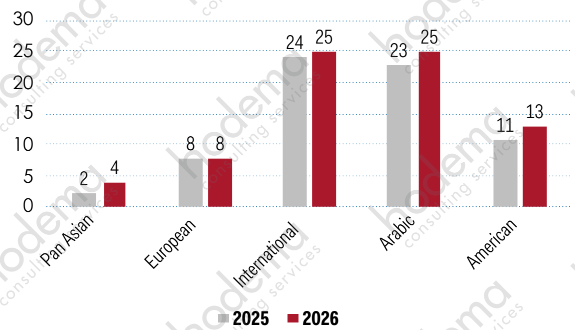
F&B outlets

68 IN 2025

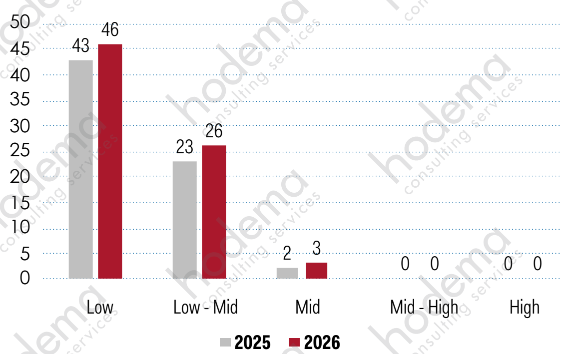
75 IN 2026



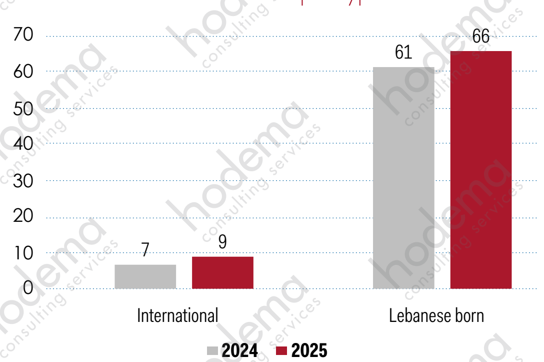
Number of F&B outlets per positioning



Number of F&B outlets per concept origin



Number of F&B outlets per type of cuisine



1. Dough Delights Bakery
2. Snoubar
3. Bliss Lounge
4. Ginger & Co/Pertutti
5. Super Croissant
6. Navy Coffeeshop & More
7. Kafkir Baromètre
8. Ana Lebnene
9. Brew n' Flip
10. Malak al Taouk
11. Zaatar w Zeit
12. Eatvite
13. 1866 Towers & Suites
    Bartartine
    Paul
    Roadster Diner
    Uniun
    Fro.U
    Möge Tee
14. Drop
15. Bakerloo
16. Meat Way/Chicken Way
17. Tonino
18. Chatime
19. Front Door Coffee Station
20. Bliss House
    Ice Cream
    Sandwiches
21. Marroush
22. Latte Art
23. Mailo's
24. Comsi Comsaj
25. Bliss d'Or
26. Kogowa
27. Boneless 28
28. University Crepy
29. Makdoushe
30. Mcdonald's
31. Dunkin'
32. Hayat Döner
33. Arouset Labneh
34. KFC
35. Al Abdallah
36. dipndip
37. Dominos
38. Cheese on Top
39. Snack Faysal
40. Taj al Moulouk
41. Chipotle Tex Mex
42. Crew Hut - Doodle Cup
43. Socrate
44. Shawarma w Noss
45. Sandwich Abou Afif
46. Furn Beit Manouche
47. Harb Chicken
48. Dough Beirut
49. Falafel Karim Sahyoun
50. Abou Karam Falafel
51. Mouajannat el Hamra
52. Whistles Snacks
53. Mouajannat Jeanne D'Arc
54. Tahet el Shajra
55. Furn Beirut
56. Shawarma Badrat
57. Crunchy Sip
58. Weesha Shawarma
59. 309 Hotel
    Mikey's Sandwiches & Co.
    Blackseed Cafe
    Fools Bar
60. Crumble
61. Food District
    City Wok
    Fiori
    Soul Food
    Sweet Greens
    Taco Diablo
62. Universal Snack

Antelias-Naccache-Dbayeh

Emerging Under Pressure

Once considered a secondary location within Greater Beirut's F&B landscape, Antelias-Naccache-Dbayeh has steadily transformed into one of the country's most active dining destinations. Benefiting from its proximity to affluent residential areas such as Rabieh, Biyada, Naccache, and Jounieh, as well as its strategic location along the Tripoli highway, the district has evolved from a transit-oriented commercial strip into a destination in its own right. This transformation was accelerated by consumers' growing preference to remain close to home during periods of economic uncertainty and recurring security concerns, allowing Antelias-Naccache-Dbayeh to capture demand that traditionally gravitated toward central Beirut.

Today, the area hosts a total of 196 F&B outlets, positioning it among the largest and most dynamic dining clusters in Lebanon. During periods of instability, Antelias-Naccache-Dbayeh has at times rivaled central Beirut in terms of activity and consumer traffic. While historical comparisons remain limited due to the relatively recent emergence of the district as a major F&B destination, the area continues to evolve rapidly through a combination of organic clustering, concept replication and ongoing investment.

The district's growth was initially anchored by established Lebanese dining institutions such as Diwan, Burj el Hamam, and Al Halabi, reinforcing the dominance of local cuisine within the area. Over time, the development of Sawsan Jaber Street created one of Antelias-Naccache-Dbayeh's first recognizable F&B clusters, characterized by shisha cafés and casual dining venues. Early operators such as Saniour played a key role in shaping the identity of this initial hub and attracting further investment.

The area's evolution accelerated significantly with the emergence of new commercial pockets, most notably the Mark Abi Hayla cluster. This area attracted several successful operators, including The Malt Gallery, Tavolina and Cannelle, and quickly established itself as one of the district's primary dining destinations. In parallel, the continued restructuring and renewal of F&B offerings within ABC and LeMall further expanded the market and diversified its customer base.

One of the defining characteristics of Antelias-Naccache-Dbayeh is the prevalence of brand duplication and expansion strategies, confirming the area's emergence as a well-established F&B destination in its own right. Almost half of the concepts operating in Antelias-Naccache-Dbayeh are second or subsequent branches, illustrating the confidence of operators in the area's commercial potential and its ability to compete with Beirut's more established districts. Numerous operators have selected the area for their second or third locations, including Le Noir, Tavolina, The Malt Gallery, Ginette, Mandaloun, Emotions, and Al Falamanki. At the same time, Antelias-Naccache-Dbayeh has also served as a launchpad for new concepts such as Cezanne and KP Brasserie, demonstrating its ability to support both brand expansion and concept creation.

The district's growth has been further supported by rental levels that remain relatively affordable compared to central Beirut. Combined with the success of early operators and the momentum generated by growing clusters, these conditions have encouraged continued expansion and attracted new investment. Looking ahead, several notable openings are expected to reinforce this momentum, including Margherita, Le Resto by Patchi, and Em Sherif.

Despite this success, signs of market saturation are beginning to emerge. Growth of approximately 50 new outlets in 2025-2026 illustrates the speed at which the area is expanding. Additional development is anticipated around the Joseph Khoury Marina and the Naccache side of the zone with the upcoming Khadra cluster, creating further opportunities but also raising concerns about potential oversupply.

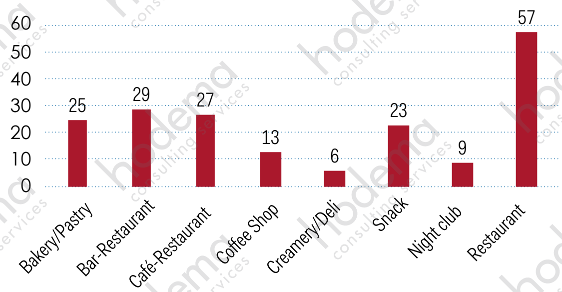
From a category perspective, Antelias-Naccache-Dbayeh offers one of the most diversified F&B mixes among all districts studied. Restaurants dominate the market with 57 outlets representing 30% of the total supply. Unlike many Beirut districts that specialize in specific categories, Antelias-Naccache-Dbayeh hosts concepts across every outlet category. The area is also notable for its nightlife offer, with nine nightclubs representing 5% of the total supply. By comparison, nightclubs account for only 1% of Beirut's overall F&B offer, with just 14 operating across the entire capital, highlighting Dbayeh's growing importance as an entertainment destination.

The district's culinary landscape is equally diverse. International cuisine remains the dominant category with 71 outlets representing 36% of the market, reflecting the broad appeal of globally inspired concepts among the area's clientele. European cuisine also enjoys a strong presence, accounting for 20.5% of the total offer. Together, these categories illustrate the area's gradual evolution from a traditional Lebanese dining destination into a more diversified and cosmopolitan market.

Positioning-wise, Antelias-Naccache-Dbayeh is primarily a mid-market destination. The mid-range segment dominates with 44% of the total supply. Another 44% of concepts fall within the low and low-mid positioning segments, reinforcing the district's broad accessibility and appeal to a wide customer base. At the upper end of the market, Aubrac by Maison Chal remains the area's sole high-end concept, reflecting the district's continued focus on accessible dining rather than luxury positioning.

Antelias-Naccache-Dbayeh's transformation over the past decade has been remarkable. What was once perceived as a secondary suburban location has evolved into one of Lebanon's most important F&B markets, supported by strong residential demand, successful clustering, and continuous investment. The challenge ahead will not be attracting new operators, but ensuring that growth remains sustainable as supply continues to expand. Whether the district can maintain its momentum without diluting performance will likely define the next chapter of its development.

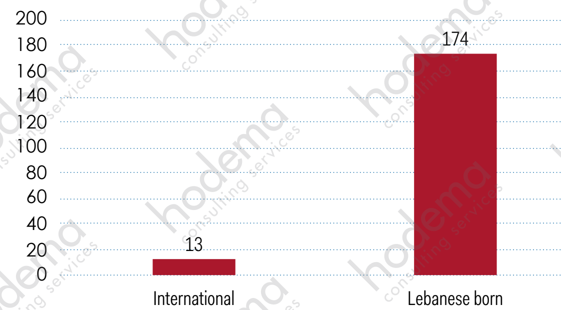
Number of F&B outlets per category



F&B outlets

189 IN 2026

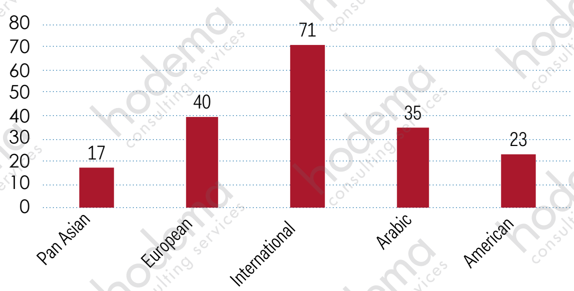
Number of F&B outlets per type of cuisine



F&B outlets

187 IN 2026

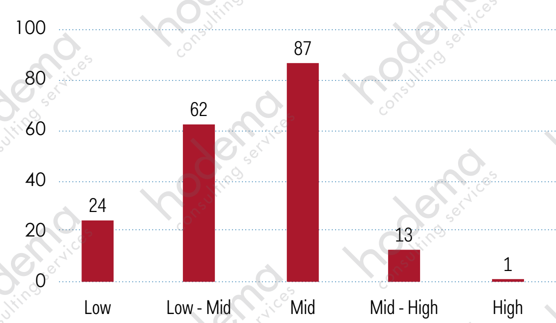
Number of F&B outlets per positioning



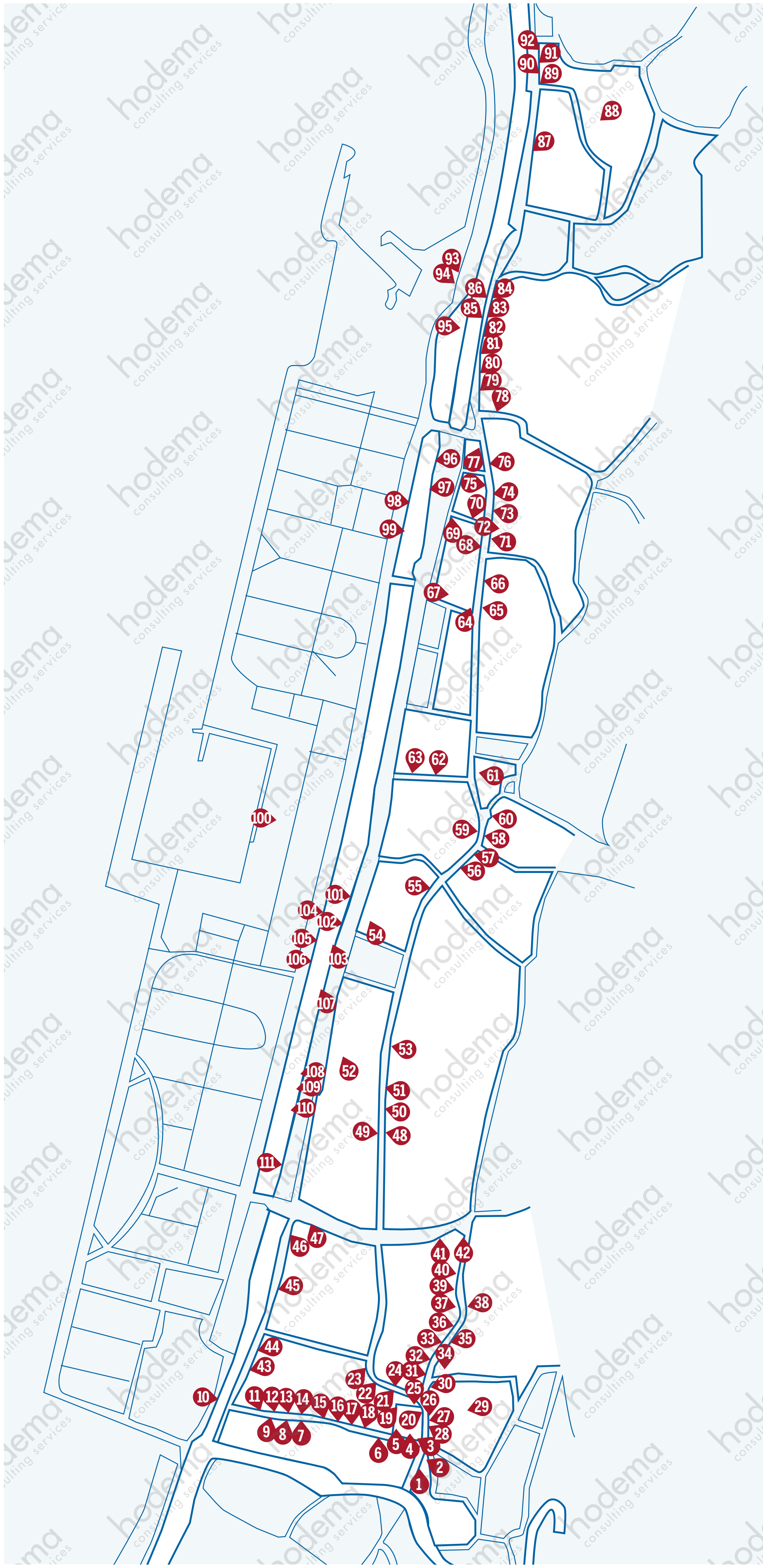
F&B outlets

186 IN 2026

Number of F&B outlets per concept origin



1. Halabi
2. Bakers Corner
3. Fadel
4. Pizza Guys
5. Pâte à Choux
6. The Dubliner Karaoke/Drink & Sing
7. Murray Resto-Café
8. Provence Resto-Café
9. Ana Beirut
10. Sweet Dodo
11. Ahwet el Set
12. Qahwet Azmi
13. Keif
14. Kahwet Julia
15. 964/NY by Komuro - Resto-Cafe
16. La Reine Restaurant/Amir Beirut
17. Mandarine Garden
18. Bahroon
19. Dany's Pub & Eatery
20. Beit Halab Snack
    Beit Halab Restaurant
21. Akiki Fresh
22. Cyrano
23. Aubrac/Maison Chal
24. Abi-Hayla Cluster
    Transatlantic
    Mojo Delicatesse
    Cannelle
    Bread Butiq
    The Malt Gallery
    KP Brasserie
    Tavolina
25. Sogno
26. Paul
    House of Butlers
    Kun Lebnéné
    Bitro Paname
27. Roxy Snack
28. Fog & Fin
29. Zéro 4
    Furn el Falamanki
    El Falamanki
    Néo Beirut
    Le Petit Lola
    Riccello
    Oakberry Açaí
    Mitsuko by Mitsu Ya
    Urban Sip
    Saltfish
    F where raising the bar
30. Le Flocon Artisan Glacier
31. Full Moon Bakebar
32. Bold Chocolatier
33. Phill & Will
34. Emotions
35. Maison M
36. The Glow Paradise
37. Tom & Mutz
38. La Grande Pâtisserie
39. Husk
40. Booza Lb
41. Seravie
42. Café Mavro
43. Manakish.com
44. Canadian Burgers
45. Burj el Hamam
46. Stéphanie, Pâtisserie Francaise
47. Capsule
48. Jardin de Ksar
    Le Chinois
    Le Noir
    Sud Resto
49. Aladdin's
50. Abdel Wahab
51. Way Cup Call
52. ABC
    Zaatar w Zeit
    Joe & the Juice
    Ni Caffé
    Roadster
    Pinkberry
    Noura Café
    Leila
    The Barn
    Bartartine
    Casper & Gambinis
    The BackBurner
    Chocolā
    Lakrids by Bülow
    The Glow Paradise
    Elevate
    Oh my Gelato
    Sablés Gourmets
    Sourdough
    Think Square Café
53. The Box
54. Le Mall
    Poème Chocolate
    Second Cup
    Sablés Gourmets
    Dunkin'
    Mcdonalds
    McCafé
    Crepway
    dipndip
    Stories
    Deek Duke
    Zaatar w Zeit
    Roadster
    Cold Stone
    Laymounia
    Paint the Waffle
55. Ginette
56. Momaki
57. Masmaket Abou Tony Foods & Restaurants
58. Canaille
59. Sheikh el Meshwe
60. Dumoi
61. The Village
    Bol & Co
    Miris
    Linas
    Muu Steakhouse
    Obi
    Divvy
    The Barrow
    Escobar
    Mayor
    Faze II
    Cicero
    Pitchers Bar & Lounge
    The Bar
    Rural
    Shirley Temple
    The Oak
62. Chop Suey
63. Nawal
64. Bartartine
65. Burger King
66. Kebebt Zamen
67. Sun Beirut
68. Casper & Gambinis
69. Medco Petrol Station Cluster
    Malak el Tawouk
    Frankwurst fine hot dog
    Hajj Nasr
    Boneless
    Crépé
70. The Glow Paradise (Six Concept store)
71. Ground 7
    Cremondo
    Couqley
    Qatch
    Capitano
72. Foodcourt
    The Wok
    Pizzanini
    5 bears
73. Aziza Beirut
74. Jazz Pizza
75. Zéphyr
76. Cézanne
77. Palonco Bar Resto
78. Babel
79. Samket Chehwan
80. Snack Azar et Nagi
81. Sushi Way
82. Amitié Pâtisserie
83. Roots/Salty Sugar Healthy
84. Wooden Bakery
85. Baba Geryes Kiosk
86. Saj Makhlouf
87. The Peninsula
88. Le Royal Hotel Beirut
    Le Jardin du Royal
    Diwan Shahrayar
89. München
90. Opus
91. Somo
92. The Fat Monk
93. Mandaloun Café
94. Kahwet Mandaloun
95. Via Dbayeh
96. Cholo Lounge
97. Sushiholic
98. Brûlé Lounge Bar
99. Chopsticks
100. La Marina Dbayeh
    Namat x The Slow
101. Root Music Venue
102. The Square
    Koï Beirut
    Kali Resto Pub
    Bar Baker
    Aura Beirut
    O2 Nightclub
    Sky Resto
    The Code Resto Pub
    Cielo Karaoke Lounge
    Téta Chariféh
103. Junction 5
    ÜLT
    Trend Club
    Moon the Club
104. Atyab Samke
105. Stun Sushi bar
106. The Stay Market
107. Margo Rooftop
108. Number One The Club
109. Skoll
110. Spine Beirut
111. Foodville
    Creffel
    Smash n' Smoke
    Cocktail Lahoud
    The Wok



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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.

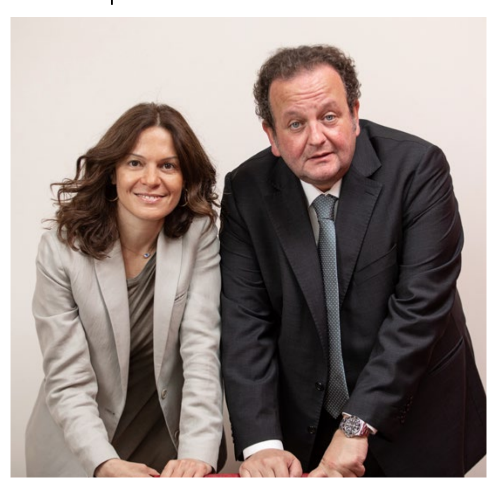
With its proven track record of business mentoring and development services, Hodema can build value for your company.

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.

Our services are highly accredited in the Lebanese and regional markets. Hodema is listed as a Franchise expert under the Lebanese Franchise Association (LFA).

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



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