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Economy and Tourism



# DUBAI GASTRONOMY INDUSTRY REPORT

DECEMBER 2023

## TASTE OF SUCCESS: DUBAI'S METEORIC RISE TO BECOMING A GLOBAL GASTRONOMY HUB

Dubai, a city known for its cultural diversity and global landmarks, has firmly established itself as one of the world's most sought-after gastronomic destinations. This "Dubai Gastronomy Report 2023", published by the Dubai Department of Economy and Tourism (DET), is a testament to the meteoric rise of Dubai's culinary scene, and its integral part in the emirate's tourism strategy and broader vision, encapsulated in the Dubai Economic Agenda, D33, launched by our visionary leadership to further consolidate Dubai's status as one of the top three global cities.

Dubai has always been a city of innovation and its ability to continuously reinvent itself has enabled it to set new benchmarks for progress. The gastronomy industry, a key driver of this transformation, has experienced remarkable growth. Reflecting the city's diversity, Dubai's ever-evolving culinary industry encompasses approximately 13,000 restaurants and cafés. From eateries serving authentic local cuisine to international fine dining establishments, the city caters to the preferences and tastes of all.

Evidence of the city's culinary prowess is further validated in DET's Gastronomy Always On (GAON) March 2023 report. According to a survey of 1,530 UAE residents, 69% of the respondents rated Dubai as the world's leading gastronomy hub, while 62% of diners expressed satisfaction with Dubai's gastronomy scene, further amplifying the growing enthusiasm for Dubai's culinary delights and the

increasing role that dining plays in the lives of its residents and visitors.

Dubai's growing popularity as a leading hub for foodies is further highlighted by an array of accolades and achievements. The city was named one of the world's top 10 cities for foodies in 2023 by Compare the Market and ranks second overall worldwide in terms of restaurant density according to Caterer Middle East. Furthermore, Dubai's remarkable representation of 15 restaurants in the MENA's 50 Best Restaurants for 2023 solidifies its culinary excellence within the region. Two of the city's leading restaurants were also named among The World's 50 Best Restaurants for 2023, while MICHELIN Guide Dubai 2023 featured 90 Dubai restaurants, including 17 Bib Gourmand winners.

This report delves deeper into the nuances of Dubai's food and beverage industry, shedding light on its exponential growth, international acclaim, and the enthusiasm of its residents and visitors alike. It is not just a celebration of Dubai's culinary scene but an invitation to our stakeholders and partners to embrace the immense opportunities presented by this gastronomic transformation.

With this report, we invite you to explore the vibrant culinary tapestry of Dubai and obtain first-hand insights into the remarkable journey that has made the city a global gastronomy hub. We hope this document will inspire you to become a part of Dubai's extraordinary culinary landscape.

Bon appétit! / Bel Afya!

**Ahmed Al Khaja**  
CEO of Dubai Festivals and Retail Establishment (DFRE), part of Dubai Department of Economy and Tourism (DET)

# INTRODUCTION

## GLOBAL ACCLAIM FOR DUBAI'S GASTRONOMY OFFERINGS

Dubai's rapid emergence as one of the world's hottest gastronomy destinations has continued unabated in 2023, with the city's eclectic F&B scene earning fresh acclaim both at home and abroad.

Highlighting Dubai's reputation as one of the world's greatest multicultural cities, MICHELIN-starred establishments, are reflective of its diverse populace. Collectively, they help set Dubai apart in the international dining arena.

Reflecting the city's growing global stature, UK-based Compare the Market crowned Dubai one of the world's 10 cities for foodies in 2023. Meanwhile, Dubai ranks second only to culinary favourite Paris in terms of restaurant density.

From an industry perspective, SMEs are the lifeblood of Dubai's gastronomic scene, and the success of Dubai's broader economic growth strategy to support this business sector is reflected by the rapidly increasing number of homegrown restaurants receiving international acclaim.

Two of the city's best – trailblazing Indian restaurant Tresind Studio and Levantine favourite Orfali Bros Bistro – were named among The World's 50 Best Restaurants for 2023, while 90 local restaurants, featured in this year's MICHELIN Guide Dubai.

Fifteen of Dubai's leading dining institutions were also named among the Middle East and North Africa's MENA 50 Best 2023, with Ossiano not only making its debut in the list but placing highest at fourth place overall and claiming the Highest New Entry Award.

Sustainable gastronomy continues to grow in importance in Dubai. In 2023, MICHELIN honoured three leading outlets – Lowe, BOCA and Teible – with its Green Star award, which recognises restaurants at the forefront of sustainable practices. In addition to receiving the MICHELIN accolade, BOCA was named the Sustainable Kitchen of the Year at the Gault&Millau UAE Awards 2023.

Diners are also voicing their approval of the city's F&B scene, with 62 per cent of respondents surveyed as part of Dubai's Department of Economy & Tourism's (DET), expressing their satisfaction with Dubai's dining experience. The overwhelming majority of the more than 1,500 respondents also praised the variety of cuisines on offer, the quality of the food itself and the level of service received.<sup>1</sup>

Dubai's culinary ascendancy dovetails neatly with

the city's broader vision, encapsulated in the groundbreaking **Dubai Economic Agenda – D33**.

The comprehensive macroeconomic plan, which aims to double the size of Dubai's economy over the next decade and consolidate its position among the top three global cities, includes 100 transformative projects that will reshape the way people live, work and play in the emirate.

It also places emphasis on developing the emirate's fastest-growing economic sectors, such as tourism and hospitality. A stated goal of D33 is to establish Dubai as one of the top three international destinations for tourism and business, with the city's gastronomy sector playing a key role in this respect.

Moreover, D33 aims to integrate new generations of Emiratis into the private sector, making Dubai a hub for skilled workers, the fastest growing and most attractive global business centre, and an international hub for global multinational companies (MNCs) and small to medium enterprises (SMEs).

The remarkable economic expansion plan will help underpin the next phase of growth for Dubai's gastronomy sector, helping consolidate its success to date while building for the future.



<sup>1</sup> DET GAON Wave 3 report, p9

# DUBAI 2023 GASTRONOMY HIGHLIGHTS

**TOP  
10**

**DUBAI WAS  
NAMED ONE OF  
THE WORLD'S TOP  
10 CITIES FOR  
FOODIES IN 2023**

Source: Compare the Market

**#2**

**DUBAI RANKS  
SECOND OVERALL  
WORLDWIDE  
IN TERMS OF  
RESTAURANT  
DENSITY**

Source: Caterer Middle East

**62%**

**OF DINERS  
EXPRESSED  
SATISFACTION  
WITH DUBAI'S  
GASTRONOMY  
SCENE**

Source: DET GAON March 2023  
survey, published 2023

**15**

**DUBAI  
RESTAURANTS  
NAMED  
AMONG THE  
MENA TOP 50  
RESTAURANTS  
FOR 2023**

Source: MENA 50 Best  
Awards 2023

# DUBAI GASTRONOMY OVERVIEW

## RESTAURANTS AND FOOD OUTLETS

### DUBAI: WELCOME TO ONE OF THE WORLD'S FASTEST-GROWING GASTRONOMY DESTINATIONS

Home to 13,000 restaurants and cafes, Dubai's F&B scene now ranks among the world's largest and most eclectic

The unrelenting growth of Dubai's gastronomy sector is highlighted by its remarkable expansion over the last 12 months.

Reflecting the city's diversity, Dubai's gastronomy industry today encompasses more than 13,000 restaurants and cafés. From relaxed eateries serving authentic local cuisine to international fine dining institutions, Dubai's gastronomy sector truly caters to the preferences and tastes of all visitors and residents.

The sector's rapid and ongoing expansion has positioned Dubai second only to culinary favourite Paris in terms of restaurant density, according to findings published by Caterer Middle East.

Dubai's inclusive and expansive approach to cuisine ensures there is always something to suit all tastes and budgets, and even despite inflationary pressures, diners are choosing to eat out more often in Dubai today than they did a year ago.

#### FREQUENCY OF DINING OUT [Average/week]

WAVE 3  
2.9 ▲



WAVE 2  
1.8



WAVE 1  
2.1

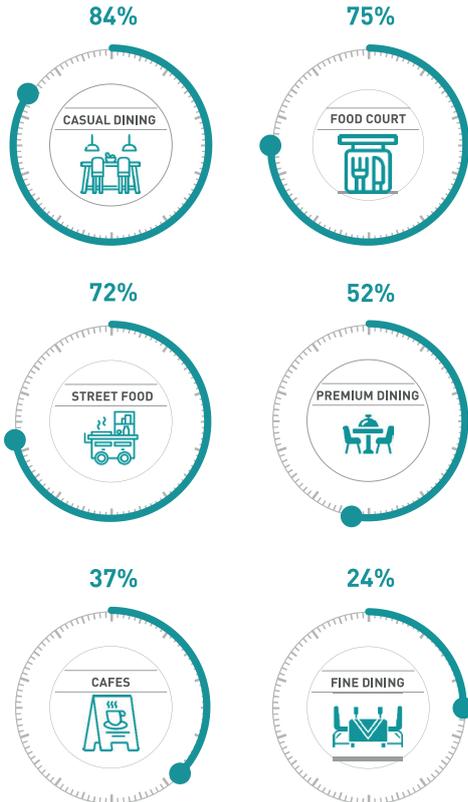


# DUBAI DINERS EATING OUT MORE IN 2023

Dubai's Department of Economy & Tourism's (DET) Gastronomy Always On (GAON) report (March 2023), found there had been a 61 per cent year-on-year increase in the average number of occasions respondents were dining out per week compared to a year earlier [2.9 nights in 2023 versus 1.8 in 2022].

Casual dining establishments were the most popular

## RESTAURANT TYPES VISITED [%]

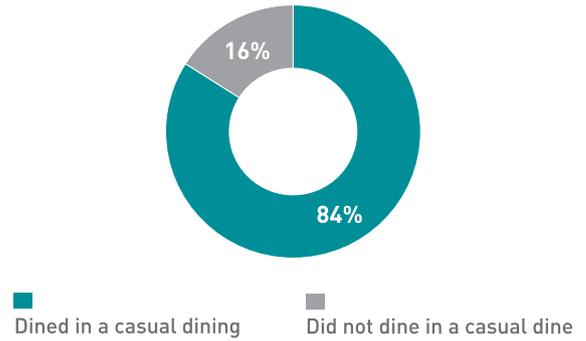


options in 2023, accounting for 84 per cent of all dining experiences, followed by food courts (75 per cent) and street food vendors (72 per cent).

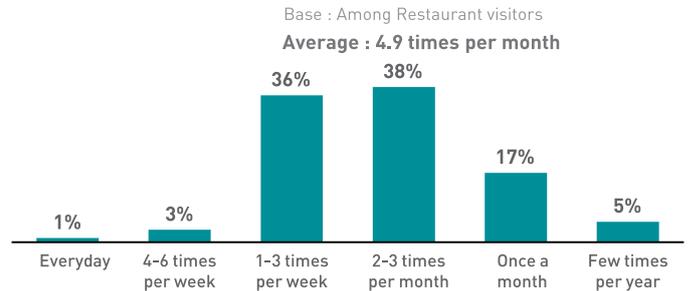
Across diner demographics, casual establishments proved popular with all respondents, while street food outlets were a hit with Gen Z (those born between 1997 and 2012) and those with lower incomes.

Overall, GAON's findings in this respect highlight the rapid maturation of the city's gastronomy sector, with its strong focus on diversification delivering greater value for money for cash-strapped diners.

## CASUAL DINING [%]



## FREQUENCY OF CASUAL DINING



# FOOD DELIVERY SERVICES

## THE RISE AND RISE OF FOOD DELIVERY SERVICES

While Dubai has long been recognised among the GCC’s leading food delivery markets, growth has accelerated in recent years thanks to the proliferation of new technologies –most notably increasingly sophisticated and convenient food ordering apps.

This trend has continued since the end of the pandemic, with the sector’s growth being driven by the proliferation of new technologies, most notably increasingly sophisticated and convenient food ordering apps, driven by increased consumer demand.

All four providers have posted unprecedented growth over the past two years, with Talabat reporting a 400 per cent increase in orders from 10 active cloud kitchens in 2022 alone.<sup>5</sup>

Food deliveries accounting for 87 per cent of all online purchases made by residents in Dubai in Winter 2023, compared to 73 per cent during the same period a year prior.<sup>6</sup>

Online food delivery services are also popular among international visitors to Dubai. According to Dubai’s Department of Economy & Tourism’s (DET) Pulse Module report, published in May 2023, one in 10 visitors used food delivery apps during their stay in Dubai, with these visitors ordering online 2.7 times on average.

However, the use of these apps actually declined year on year, with diners expressing a preference for eating out during their stay in the city.

Meanwhile, rising demand for premium dining options provided through food delivery services has spurred growth in the UAE’s ‘cloud kitchen’ sector, which are catering venues established for the sole purpose of providing takeaway food services.

Tech-enabled cloud kitchens rank among the fastest-growing segments of the UAE’s online food delivery sector, almost doubling in size in the period spanning 2017-19.

Major hotel operators including Accor with its new Kitch-In food-tech delivery platform, and Radisson Hotel Group, which has partnered with Krush Brands to provide premium food delivery options, reflect the changing nature of the cloud kitchen sector, and its long-term growth potential.

### FOOD DELIVERY SERVICES THRIVE POST PANDEMIC AS WELL

#### CATEGORIES PURCHASED ONLINE [%]



Winter 2023: **87%**

Winter 2022: **73%**

### FREQUENCY OF ORDERING IN [Average/week]

WAVE 3  
2.0



WAVE 2  
1.7



WAVE 1  
2.2



<sup>3</sup> DET Dubai Gastronomy Landscape August 2023, p2

<sup>4</sup> Redseer <https://redseer.com/newsletters/dark-kitchens-the-bright-future-of-food-services-2/>

<sup>5</sup> Source: Khaleej Times Feb 28, 2023

<sup>6</sup> Retail & Shopping Study Winter 2023: Residents Edition

# F&B BENCHMARKING

## DUBAI ECLIPSES ESTABLISHED RIVALS IN GLOBAL BENCHMARKING INITIATIVE

### Source market surveys highlight Dubai's impressive rise to prominence as a top gastronomy hub

Dubai is now recognised among the world's top gastronomy destinations, and its gastronomy sector continues to evolve in line with the expansion and development of the city.

As part of Dubai Department of Economy & Tourism's (DET) market outreach initiatives, the organisation regularly surveys respondents in key visitor source markets about their attitudes and perceptions of Dubai's gastronomy scene.

## DUBAI RESIDENTS RATE DUBAI ABOVE ESTABLISHED GASTRONOMY HUBS

Dubai's Department of Economy & Tourism's (DET) Gastronomy Always On (GAON) 2023 report, which surveyed UAE residents, found that 69 per cent of respondents rated Dubai the world's leading gastronomy hub.

According to the Gastronomy Always On (GAON) March 2023 report, Dubai topped the poll as the world's leading gastronomy hub in the second half of 2022, consolidating and building on its position from 2021 (69 per cent, or +14pts year on year).

Other leading gastronomy destinations cited by UAE residents included second-ranked Milan and equal third-placed Istanbul and Paris. New York and London were also cited among the world's top gastronomy hubs by survey respondents.

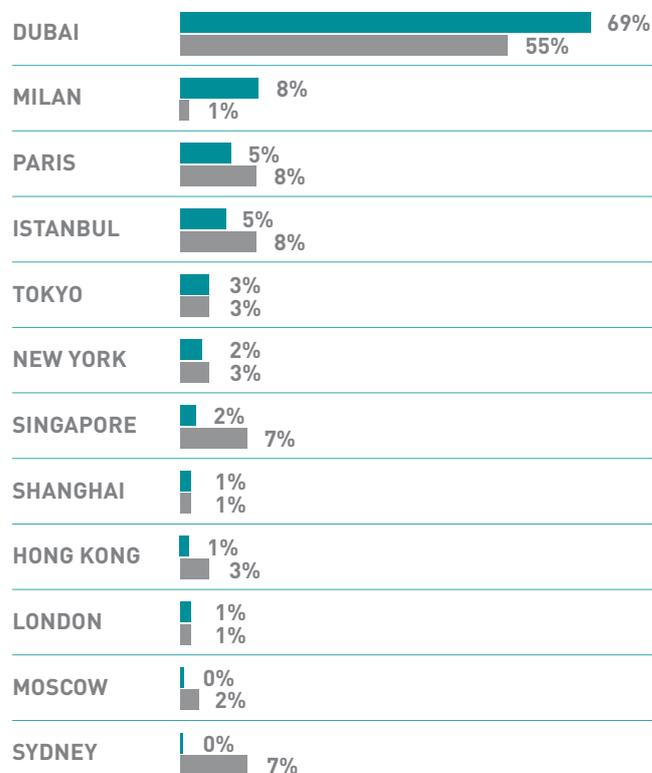
Dubai extended its lead as the world's top destination compared to the previous year's survey, which saw 55 per cent of respondents rank it first worldwide.

UAE Nationals overwhelmingly (90 per cent) rated Dubai first overall in 2023, followed by 78 per cent of residents originally from South Asia and 69 per cent of residents from the GCC region.

Interestingly, these positive perceptions were consistent across income levels, with all respondents overwhelmingly rating Dubai as the world's top gastronomic hub.

By age demographic, 72 per cent of Gen Z and Boomer respondents named Dubai as the world's leading destination, followed by 69 per cent of Millennials and 66 per cent of Gen Xers.

### WORLD'S LEADING GASTRONOMY HUB



# DUBAI DINING: PERCEPTION AND EXPERIENCE

## DUBAI DINERS PRAISE CITY'S FOCUS ON EXPERIENTIAL DINING

Dubai's Department of Economy & Tourism's (DET) revealed that 62 per cent of survey respondents were satisfied with their overall dining experience in Dubai, with the overwhelming majority (70 per cent of respondents) praising the variety of cuisines on offer, the quality of the food itself and the level of service received.

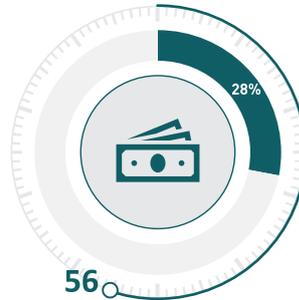
Survey respondents also praised the cleanliness and hygiene standards that are upheld by F&B outlets across Dubai, with more than one in three citing this as a positive across all dining experiences, as well as their general appearance and ambience. They also made note of the number of world-class restaurants operating in the city.

Fewer than 10 per cent of respondents cited expensive prices as a barrier, while two per cent noted a relative lack of facilities or menu options for families with children.

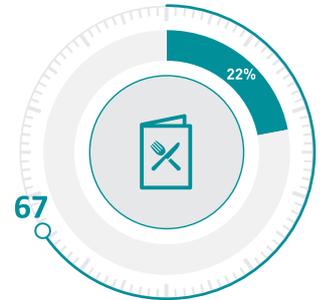
The choice of price options was cited as a primary factor in the decision-making of 28 per cent of prospective diners, despite 56 per cent of all respondents praising the range of budget-friendly dining options available in Dubai.

### HIGH IMPACT | 67%

RANGE OF VARIETY OF PRICE POINTS



NEW FLAVOUR WITH FUSION MENU

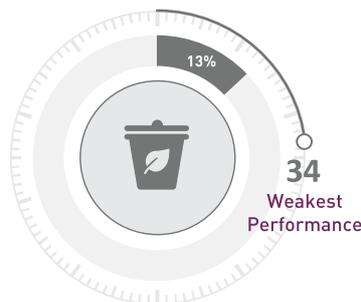


RESTAURANTS WITH DIFFERENT CUISINES

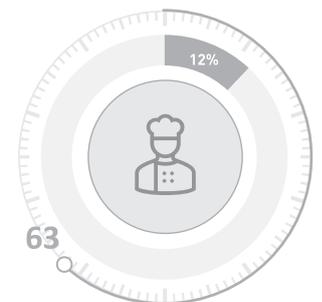


### MEDIUM IMPACT | 25%

TACKLING FOOD WASTAGE

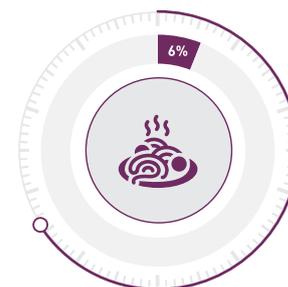


WORLD CLASS CHEFS & WORLD CLASS DINING



### LOW IMPACT | 8%

RESPECTS ARAB TRADITION, LOCAL CUISINE OFFERING



CULTIVATE & PROMOTE SUSTAINABILITY



# DUBAI'S HOTTEST DINING DESTINATIONS

Dubai's dining scene continues to generate strong buzz online, with key areas of the city receiving consistently positive reviews from diners, as highlighted by their impressive digital reputation scores

Each result is calculated using an algorithm that combines the scores extracted from various online review sites observed during a specific timeframe.

Across all dining destinations in Dubai, there has been a consistent increase in performance scores from 2022 and H1 2023. This indicates a general improvement in the quality of dining experiences or the perception thereof.

**Dubai Marina** stands out with the highest performance score of 100% in H1 2023. This suggests that it is currently the most positively reviewed dining destination in Dubai.

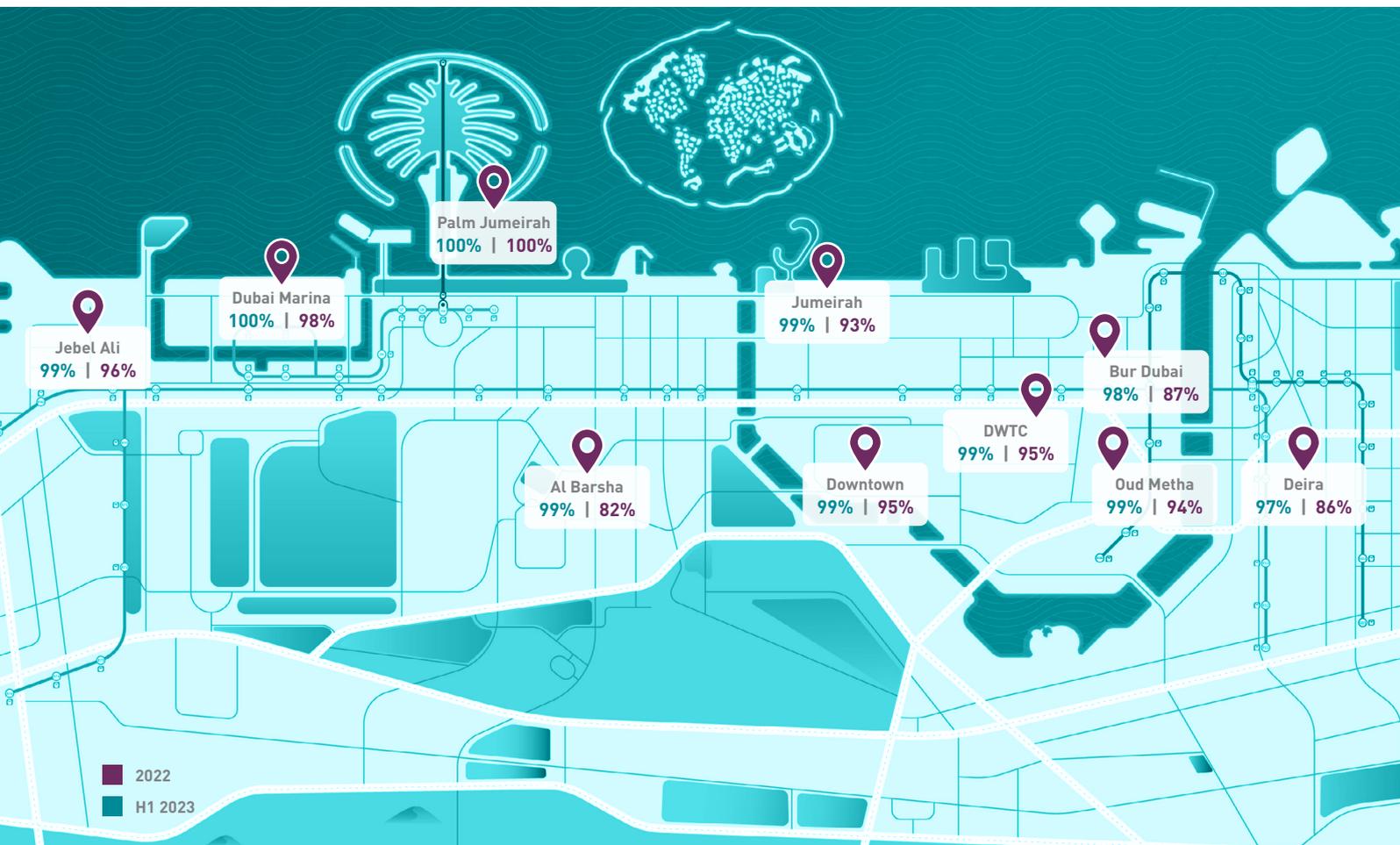
**Oud Metha** has shown a significant improvement from 94% in 2022 to 99% in H1 2023, marking a 5% increase over the period. This is the highest improvement observed among all destinations.

Both **Downtown Dubai** and **Palm Jumeirah** have maintained high scores throughout the three years



surveyed, with Downtown scoring 95% in 2022 and improving to 99% in H1 2023, and Palm Jumeirah maintaining scores above 98% throughout.

**Jebel Ali** has shown steady improvement, reaching 99% in H1 2023. This trend highlights the area's rapid growth in recent years and emerging reputation as a dining hotspot.



## RISING DEMAND FOR AUTHENTIC, BUDGET-FRIENDLY OPTIONS DRIVES STREET FOOD SCENE

Dubai's fast-growing street food scene is testament to its reputation as one of the world's most multicultural cities. From Deira's Al Muraqqabat Road, with its diverse and authentic Middle Eastern cuisine, to Bur Dubai's Meena Bazaar, which resonates with the flavours of India, and Karama – the city's bustling heart which offers a plethora of options from African kerbside diners to Middle Eastern bakeries, Dubai streets showcase the diversity and authenticity of Dubai's gastronomic scene, promising a treat for every palate.

From food trucks to independent stalls, demand for unique, authentic and affordable dining options is driving the growth of the sector.

Looking to capitalise on the rising demand for casual, street food dining options, the inaugural Ramadan Street Food Festival was staged from 31 March to 9 April this year.

The festival, which was held in Karama's Sheikh Hamdan Colony and attracted the involvement of 54 local cafes, restaurants and streetside vendors, proved a hugely appealing option for those looking to break their fast during the Holy Month, with thousands of diners descending on the area each night.

The festival provided visitors the chance to enjoy offered limited edition dishes, festival offers and discounts, Ramadan photo opportunities and special lighting and festive entertainment.

With its vast range of Arabic and South Asian cuisine, the event attracted expat residents of all nationalities, as well as many international visitors to Dubai.

The festival also helped shine a light on Karama's burgeoning reputation as one of Dubai's most exciting street food destinations.

According to data from Dubai's Department of Economy & Tourism (DET), 58 per cent of visitors to the festival were visiting Karama for the first time, while 87 per cent of visitors said they were highly satisfied with the quality and diversity of cuisine on offer.

# GASTRONOMY ALWAYS ON 2023

## DINING MORE, SPENDING LESS: THE KEY FINDINGS FROM GAON 2023

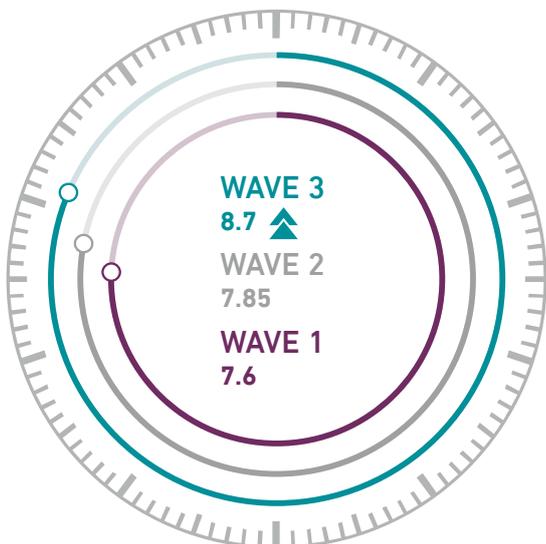
Gastronomy Always On is a research programme established by Dubai's Department of Economy & Tourism (DET), which is designed to gauge their

perceptions of Dubai's gastronomy offerings, analyse spending and dining habits and help benchmark the city's performance against other cities worldwide.

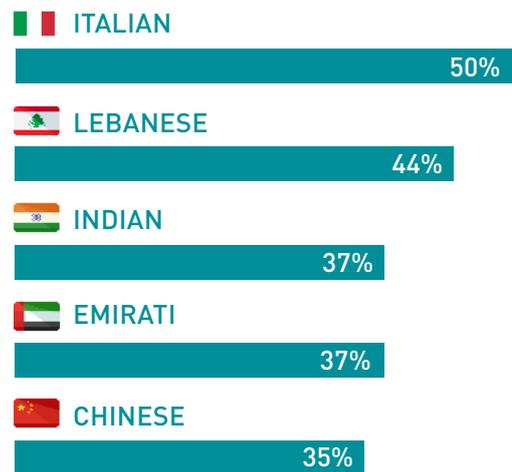
Results were compared to previous editions of the report, with Wave 1 (the first edition) being published in January 2022 and Wave 2 being published in May 2022.

## HEADLINE FINDINGS

### OVERALL SATISFACTION



### TYPES OF CUISINE ORDERED [%]



## KEY TRENDS

While diners are eating out more in 2023, inflationary pressures are encouraging residents to seek out better value alternatives compared to previous years, with spending on meals falling to AED162 per capita in 2023, compared to AED198 in the previous study.

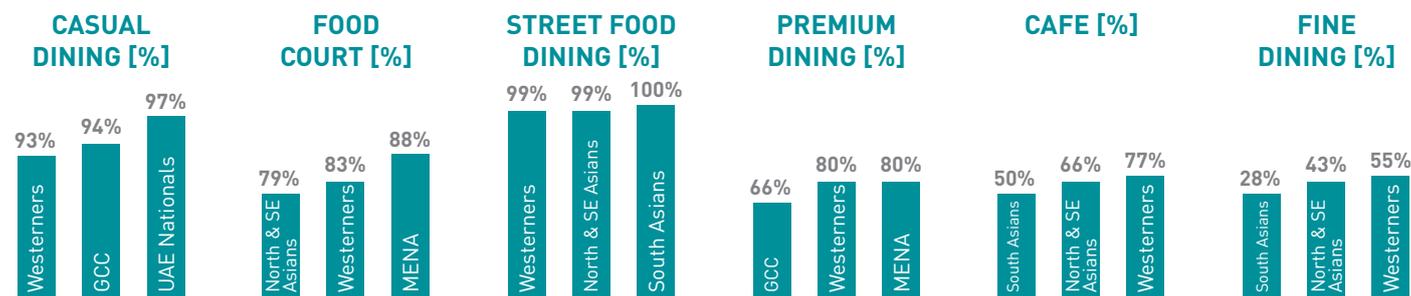
Gen Xers, North & SE Asians and Westerners spent the most while dining out (respectively AED191, AED200 and AED237 per week per capita).

Normal dining occasions said they were most concerned about receiving value for money when dining out, with 36 per cent of respondents claiming this as the top priority. The second most important factor was the type of cuisine available (33 per cent), followed by food hygiene standards (32 per cent).

for special occasional diners, the priority is the restaurant's ambience (38 per cent), followed by service standards (36 per cent) and hygiene (36 per cent). Italian, Lebanese and Indian are the most popular cuisines in Dubai, while awareness of Emirati cuisine is unsurprisingly highest among UAE nationals.

Casual dining is also popular amongst mid- to high earners, while street food is a popular choice among Gen Z respondents and the less affluent (90+ per cent).

In terms of opportunities moving forward, survey respondents said the F&B industry should do more to tackle food waste, despite 52 per cent of respondents stating their satisfaction with the sector's efforts to promote sustainability, with locally sourced ingredients becoming an industry-wide priority.



## DUBAI GASTRONOMY OFFERINGS

### RISING STARS RECEIVING INTERNATIONAL ACCLAIM

Dozens of Dubai's leading restaurateurs are being recognised by the world's most prestigious F&B awards programmes, helping put the city on the map as a global gastronomic destination

## MICHELIN GUIDE DUBAI

Launched in 2022, the inaugural MICHELIN Guide to Dubai's gastronomy scene featured 69 of the city's best restaurants, providing readers with unique insights into the city's burgeoning status as one of the world's great dining destinations. Acknowledging the remarkable growth of the sector over the past 12 months, this year's follow-up featured 90 restaurants, including 17 Bib Gourmand winners. It was also the first guide in the brand's 120-year-long history to feature no demotions – only new additions and restaurants either retaining their stars or earning more stars.

### 2023 TWO MICHELIN-STAR WINNERS



#### IL RISTORANTE - NIKO ROMITO

Incredible, authentic Italian cooking lies at the heart of Il Ristorante - Niko Romito. The five-star Bulgari Hotel & Resorts' signature restaurant is famous for reimagining Italian favourites, from Parmigiano Reggiano soup and roasted langoustines salad to spaghetti with sea urchins.



#### STAY BY YANNICK ALLÉNO

STAY by Yannick Alléno encapsulates the innovative nature of Dubai's fine dining scene. This signature restaurant located in the luxurious One&Only The Palm offers a unique take on classic French cuisine, showcasing cutting-edge cooking and presentation techniques. The restaurant's remarkable Pastry Library, where desserts are tailor-crafted to perfection, is a true highlight.

Gault & Millau is recognised as one of the world’s most respected food guide publishers. The 2023 edition of the company’s UAE guide features more than 100 restaurants from across the UAE, with their respective quality judged according to an ascending scale of One Toque to Four Toques. Two Dubai restaurants – Al Muntaha in the Burj Al Arab Jumeirah and Ossiano at Atlantis, The Palm, received the maximum rating of Four Toques in this year’s guide.



**AL MUNTAHA (4 TOQUES)**

Located on the 27th floor of Burj Al Arab Jumeirah and providing incredible views over the Arabian Gulf, Al Muntaha, which means ‘the ultimate’ in Arabic. Under the leadership of renowned chef Saverio Sbaragli, this award-winning restaurant serves exquisite French and Italian dishes.



**OSSIANO (4 TOQUES)**

Ossiano made its debut in the 50 Best Restaurants list in 2023, reaching a remarkable fourth place overall and claiming the Highest New Entry Award. Led by acclaimed chef Gregoire Berger and situated in Atlantis, The Palm, the signature restaurant’s degustation menu is matched in quality only by its impressive surroundings, with the dining room seemingly submerged within the hotel’s world-famous aquarium.

**MENA 50 BEST RESTAURANTS 2023**



Celebrating the Middle East and North Africa’s (MENA) best restaurants, the 2023 list featured venues from 14 cities across the region, including 15 from Dubai.



**ORFALI BROS (RANKING: 1<sup>st</sup>)**

Founded by three food-loving brothers from Syria, Orfali Bros brings a fresh take to traditional Arabic favourites, serving up world-class cuisine in the process. Highlights such as sumac-dusted chicken musakhan flatbread and Arabic sausage gyoza dumplings, showcase the brothers’ talent for blending culinary traditions inspired by their overseas travels. Their incredible desserts are also not to be missed.



**TRÉSIND STUDIO (RANKING: 2<sup>nd</sup>)**

The latest restaurant in Dubai to receive two Michelin stars, Trésind Studio is a symphony of culinary mastery, offering an immersive dining experience that redefines Indian cuisine with avant-garde techniques and exquisite presentations. Conceived by acclaimed chef Himanshu Saini, the restaurant’s degustation menu changes ever four months, providing plenty of variety for passionate foodies.

**WORLD’S 50 BEST RESTAURANTS 2023** 50 BEST

Celebrating the Middle East and North Africa’s (MENA) best restaurants, the 2023 list featured venues from 14 cities across the region, including 15 from Dubai

The unveiling of The World’s 50 Best Restaurants rankings in June 2023 saw Dubai shine brightly, with two exceptional restaurants earning positions in the top 50. The outstanding **Trésind Studio**, which was runner-up in the **MENA 50 Best Restaurants 2023 Awards**, ranked 11th in the World’s 50 Best, while **Orfali Bros**, which claimed overall honours in the MENA list, ranked 46th in the World rankings

# DUBAI GASTRONOMY HUB

## MAJOR EVENTS BOOST DUBAI'S STATUS AS MAJOR GASTRONOMY HUB

Underpinning Dubai's efforts to promote itself as a global gastronomy hub is the year-round calendar of major culinary events and promotions that continues to grow in size and international stature.

This year saw the return of popular annual events designed to drive community and industry engagement.

The city's premier annual foodie event, the **Dubai Food Festival (DFF)**, once again provided residents and visitors to the city fresh opportunities to enjoy the emirate's finest gastronomy experiences.

Marking its 10th edition in 2023, this year's event, which was staged from 21 April to 7 May, featured a huge range of promotions and initiatives, from dining discounts, citywide competitions and experiential dining events all over the city.

DFF's Foodie Experiences Programme featured a range of exciting initiatives, from culinary workshops, including masterclasses with acclaimed chefs, to caviar and oyster shucking classes, children's cooking sessions and foodie tours.

As part of Dubai Restaurant Week, diners enjoyed exclusive set menus and discounted prices at 50 of the city's top restaurants including 3 Fils, Torno Subito by Massimo Bottura, Gordan Ramsay's Bread Street Kitchen, Demon Duck by Alvin Leung, Ariana's Persian Kitchen, Akira Back, Coya, Clap, Roka, Carnival by Tresind, and Reif Japanese Kushiyaki.

DFF's profile continues to grow, with hundreds of thousands of residents and visitors embracing the event in 2023. Beachside dining pop-up Etisalat by e& Beach canteen attracted more than 95,000 visitors, while more than 13,000 diners enjoyed the discounts and promotions available during Dubai Restaurant Week, including 10 Dirham Dishes served at more than 200 outlets across the city.

Dubai's growing food truck scene was also celebrated in February, with dedicated festival **Miami Vibes**, which was staged in Al Wasl, attracting an estimated 10,000 diners per day. Thirty of the UAE's most popular food trucks, each owned and operated by Emirati F&B entrepreneurs, took part in the event, including Chunk Bakehouse, Fritz, One Wheel Ticket, Baofriend, Taqado Mexican Kitchen, Sauce dinner and Ali Bhai.

**Taste of Dubai** also returned in February, with the world-class foodie event bringing together some of the UAE's best restaurants and most talented chefs in Dubai Media City Amphitheatre and attracting more than 20,000 diners in the process. In addition to delicious food, the event boasted live entertainment, appearances by celebrity chefs including Massimo Bottura, Jason Atherton and John Torode, play areas for kids, masterclasses and more.

The region's biggest annual F&B industry event, **Gulfood**, marked its largest-ever instalment in 2023. Celebrating its 28th year, the conference and exhibition focused on key issues impacting the F&B sector including sustainability, driving operational efficiencies in the face of rising costs and Dubai's growing influence on global F&B trends. The exhibition itself featured 125 country pavilions in 2023, including first-time exhibitors Armenia, Cambodia and Iraq.



# FORECAST & FUTURE TRENDS

## HOW SOCIAL MEDIA IS SHAPING GASTRONOMIC TRENDS

**Social media is playing an increasingly important role in providing F&B stakeholders with a barometer of the dining public's behaviour while shaping future industry trends.**

Dubai's Department of Economy & Tourism's (DET) latest Gastronomy Always On (GAON) report, published in March 2023, revealed that 82 per cent of survey respondents had sourced information about food trends from online sources, particularly through social media (69 per cent) platforms.

Gen Z were the most prolific users of social media at 81 per cent, followed by Millennials at 69 per cent,

Boomers (66 per cent) and Gen X (61 per cent).

The GAON report highlights the importance to F&B stakeholders in Dubai of a cohesive online presence and sophisticated social media marketing strategy to capture interest from potential diners.

In terms of future market trends, the report highlights the growing demand for street food, food trucks and experiential dining among food enthusiasts – three sectors of the market Dubai already excels in but has outlined aggressive plans for future growth.

Sustainability is another crucial trend moving forwards, and one which the industry is fully embracing as part of its commitment to Dubai Economic Agenda – D33 and UAE Net Zero 2050 – the national campaign to achieve net-zero emissions by 2050.



# CONCLUSION

## DUBAI'S FOUR GASTRONOMIC PILLARS FOR LONG-TERM SUCCESS

Showcasing Dubai's gastronomic diversity, authenticity, value for money and unique dining experiences is crucial to the industry's future growth

### DIVERSITY

Home to more than 200 nationalities, Dubai is already recognised as one of the world's most diverse cities, and the vast range of culinary options offered by its 13,000 F&B outlets reflects this status.

In line with its commitment to building on this reputation, Dubai's Department of Economy & Tourism (DET) is rolling out a series of initiatives designed to showcase the eclectic and inspiring nature of the city's gastronomy scene.

One of the most important in this respect is encouraging more food tour operators to set up shop in Dubai. According to DET's Gastronomy Always On (GAON) 2023 report, 41 per cent of UAE residents placed food tours at the top of their wishlist for the industry, followed by new food guides (36 per cent of respondents).

Showcasing the esteem in which the city's gastronomy sector is held internationally, some of the world's best-known chefs are now regularly present and active in the market. This trend was apparent at Dubai Food

Festival (DFF) 2023, with the event's Foodie Experiences promotion attracting some of the world's top talent.

Popular highlights included a private dining experience at Nobu, hosted by Executive Chef Damien Duviau and Sushi Master Chef Michio Iwata; an eight-course tasting menu from Kunal Kapoor at Pincode; and a Four Hands Dinner with Demon Duck's Alvin Leung and Masterchef's Eric Chong.

Other highlights of the initiative included a Chef's Masterclass at Tabu, where guests learned how to prepare sushi and ceviche from scratch, and also enjoyed an umami experience hosted by chef Roberto Segura; a kitchen walkthrough at 11 Woodfire guided by either Chef Susu or Chef Pasang, followed by a specially curated dining experience; and an exclusive chef's table promotion at SOL Roof Top Bar, where diners were treated to an outdoor live kitchen experience, with chefs providing key insights into each course on the menu.

### VALUE FOR MONEY

Showcasing Dubai's value for money equation is another key factor that is crucial to Dubai's long-term success as a gastronomic hub and one which is cited as a consideration among 36 per cent of GAON 2023 survey respondents.

Quick service and casual restaurants continue to be the top preference for tourists driven by convenience and value for money, the report states.

In a positive development, 66 per cent of international visitors were satisfied with the value for money they received when dining out in 2023, compared to just 54 per cent in 2022, according to the research.

In 2023, DET launched a number of important initiatives designed to provide diners with greater bang for their buck.

The inaugural Ramadan Street Food Festival drew thousands of diners each night to Karama to experience the city's finest street food at impressively affordable prices, with 87 per cent of visitors stating their satisfaction with the quality and diversity of cuisine on offer.

More than 13,000 diners also enjoyed the discounts and promotions available during DFF 2023's Dubai Restaurant Week, where more than 50 of the city's top restaurants offered set menus at attractive prices.

Another popular initiative was the 10 Dirham Dish campaign, which saw more than 200 F&B outlets from across the city, including Hell's Kitchen, Pickl, Pierchic and The Noodle House, offer a selection of signature dishes for just AED 10.



## AUTHENTICITY

Promoting and leveraging homegrown talent as well as Emirati cuisine and culture is another crucial factor in Dubai's global gastronomy push.

While the city's cultural diversity is reflected in the eclectic nature of its restaurant culture, many international visitors to the city know little about Emirati cuisine, as reflected in Pulse Module report that found only 13 per cent of respondents had dined at an Emirati restaurant during their stay, compared to 64 per cent who had eaten at restaurants specialising in Lebanese or Syrian cuisine.

According to the report, there is an opportunity to improve awareness among Gen X, Westerners, N&SE Asians and South Asians.

DET is committed to raising the profile of Emirati cuisine as well as talented local chefs through long-term promotional initiatives such as Made in Dubai and Hidden Gems.

DET's dedicated Made In Dubai online portal features a series of in-depth profiles of Dubai's top F&B talent, from chefs to restaurateurs, as well as comprehensive listings and reviews of the city's top local restaurants.

Meanwhile, Hidden Gems promotes lesser-known outlets across the city that specialise in serving up fresh authentic flavours while providing outstanding value for

money. With restaurant reviews and profiles, eclectic food tour itineraries, and video presentations, the Hidden Gems website turns the spotlight on some of the Dubai's finest neighbourhood eateries, which specialise in authentic, wholesome cuisine from around the world.

## EXPERIENTIAL

DET recognises that providing diners with unique culinary experiences is crucial to separating Dubai from its rivals on the global gastronomy map.

DFF's Foodie Experiences promotion offers diners one-of-a-kind food adventures across Dubai, including chef tables, masterclasses, culinary collaborations and unique experiential dining concepts.

Other events, such as Taste of Dubai, which is staged each February, regularly feature appearances by celebrity chefs to whet the appetites of foodies. In 2023, the event welcomed global names including Massimo Bottura, Jason Atherton and John Torode, among others.

DET is keen to build on the success of these events by expanding their scope in conjunction with key industry stakeholders, while also exploring the potential to launch new gastronomy events that further consolidate Dubai's growing global reputation as a major epicurean destination.



## CLOSING REMARKS

In conclusion, this report reflects the exceptional growth of Dubai's culinary scene. From a city defined by its towering structures to one celebrated for its diverse, delectable, and dynamic culinary offerings, Dubai has truly gone through a remarkable transformation.

The rapid expansion of Dubai's gastronomy industry, and the global recognition it has earned, is a clear indication that the emirate's gastronomic evolution is not just a trend, but a cultural phenomenon underpinned by the myriad of cuisines and flavours drawn from the cultures of over 200 nationalities that call the city their home.

As Dubai continues to build on its reputation as a world-class gastronomic destination, there are immense opportunities waiting to be harnessed. Whether you are a restaurateur looking to offer your unique dish to a global audience, a hotelier aiming to elevate your dining experiences, or a food connoisseur seeking to explore the exquisite flavours of Dubai – the possibilities are limitless.

We would like to express our gratitude to all those who contributed to this report, from the individuals who shared their insights to our stakeholders and partners, as well as the organisations that have played a pivotal role in Dubai's gastronomic journey. Your passion and dedication have been instrumental in making Dubai a global gastronomy hub.

It's truly an exciting time to be a part of this culinary renaissance, and as we look ahead to the future, we are confident of achieving continued success in this sector, ultimately realising Dubai's vision to become the best city in the world to visit, live and work in.

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