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Report Highlights:

The UAE remains one of the Middle East's leading food processing and re-export hubs, supported by world class logistics infrastructure and government initiatives to expand domestic manufacturing. More than 570 food and beverage processors rely on imported ingredients to supply the local market and neighboring countries, presenting continued opportunities for U.S. agricultural exports. The government's UAE Food Cluster initiative and National Food Security Strategy 2051 are accelerating investment in food manufacturing, agritech, and innovation.

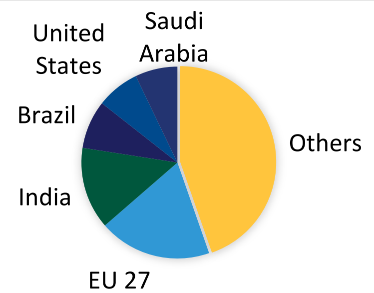
MARKET FACT SHEET

Executive Summary

The United Arab Emirates (UAE) is the second largest economy in the Arab world after Saudi Arabia, with a gross domestic product (GDP) of $571.6 billion and a projected growth rate of 3.1 percent in 2026. Foreign nationals comprise almost 89 percent. Approximately 80 percent of the UAE's agricultural products are imported. In 2025, the United States exported $1.5 billion in agricultural and related products to the UAE, making it the largest export market for U.S. agricultural products in the Gulf Cooperation Council (GCC) region.

Consumer-Oriented Agricultural Imports

The UAE imported $17.7 billion in consumer-oriented products in 2025. Primary suppliers are the European Union, India, Brazil, the United States, Saudi Arabia, and China. The market is highly competitive but significant potential for U.S. export growth exists, including in dairy products, beef and beef products, poultry meat and products, fresh fruits, tree nuts and bakery goods.



Food Retail Industry

The UAE's food e-commerce retail sales reached $1.3 billion in 2025. The UAE's grocery retail market had a total revenue of $20 billion in 2025.

Food Processing Industry

Over 570 food and beverage processors, relying heavily on imported commodities and ingredients, operate in the UAE and produce 5.96 million metric tons annually.

Food Service Industry

Food service sales rose by 2 percent in the UAE for 2025 to approximately $18.5 billion. Outlet numbers grew by 2 percent to reach 17,751.

Quick Facts in 2025

Consumer-Oriented Products Imports: $17.7 billion

Top 10 Consumer-Oriented Products Imports

Dairy	$2.4 billion
Fresh Fruits	$1.4 billion
Poultry meat and products	$1.4 billion
Beef and beef products	$1.2 billion
Tree nuts	$1.2 billion
Bakery Goods, cereals, & Pasta	$937 million
Soup and Food Preparations	$902 million
Chocolate and Cocoa Products	$821 million
Spices	$676 million
Fresh Vegetables	$524 million

Top Retailers: Carrefour, Lulu Hypermarket, Nesto Hypermarket, Union Co-operative Society, Sharjah Co-operative Society, Al Madina Hypermarket, Emirates Co-operative Society, ADCOOOP

GDP: $571.6 billion
GDP per capita: $50,230
Population: 11.5 million

Sources: Trade Data Monitor, Euromonitor, Market Data Forecast, International Monetary Fund

Strengths/Weaknesses/Opportunities/Threats

Strengths	Weaknesses
UAE is a modern transit hub in the MENA region	Specialized labeling and restrictive shelf-life requirements
USA brand recognition is prevalent among consumers	Long shipping time and high freight costs
Opportunities	**Threats**
Import regulations are transparent and straightforward	Proximity to India, Europe, and other MENA agricultural producers with cheaper prices

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SECTION I. MARKET OVERVIEW

The United Arab Emirates (UAE) is a well-developed nation, strategically positioned at the heart of the Arabian Peninsula, with exceptional infrastructure that facilitates the smooth import, export, and transit of goods within the region and beyond. Benefiting from its membership in the Pan-Arab Free Trade Area and the Gulf Cooperation Council (GCC), the UAE enjoys favorable tariff arrangements in the Middle East and has robust economic ties with Arab nations. The UAE is actively working to strengthen its position within the political and regulatory landscape of the Arabian Gulf. The UAE has a population of 11.4 million, and its gross domestic product (GDP) is expected to increase by 3.1 percent in 2026, according to the International Monetary Fund's projections.

The UAE continues to prioritize the food processing industry as a strategic pillar of its economic diversification agenda through the UAE Food Cluster, the first initiative launched under the National Cluster Strategy. The program aims to increase the food sector's contribution to GDP from $8.17 billion to $10.89 billion by 2028 while strengthening advanced food processing, agri-tech, food manufacturing, and food innovation. The country's food processing industry has grown significantly and is expected to generate $39.8 billion in 2025, rising by 5.3 percent per year until 2030. The UAE relies significantly on food imports, with approximately 90 percent of its food sourced from international markets. The contribution of the agricultural sector to the UAE's GDP remains minimal.

The UAE has firmly established itself as a global food trade hub, leveraging its strategic position at the crossroads of Europe, Asia, and Africa alongside world-class port and logistics infrastructure to move food products efficiently through regional and international supply chains. The Ministry of Economy's UAE Food Cluster initiative is pushing the sector's foreign trade volume from $6.81 billion to $10.89 billion, and its GDP contribution from $8.17 billion to $10.89 billion. The sector includes 568 food processing facilities producing nearly 6 million metric tons a year.

On the processing side, more than 570 facilities operating nationwide produce close to 6 million metric tons (MT) of food and beverage products a year, positioning the sector as central to the government's push under Operation 300bn to grow non-oil industrial output. The UAE food processing industry primarily serves the domestic market while also acting as a regional manufacturing and re-export hub for the GCC, Africa, and South Asia. Many processors import raw materials and ingredients for local processing before supplying domestic retail and foodservice channels or re-exporting finished products to neighboring markets.

Table 1: Advantages and Challenges

Advantages	Challenges
The UAE stands out as a crucial trading hub due to its excellent infrastructure, acting as a gateway to various countries in the Middle East and North Africa. The logistics market is projected to surpass $31 billion by 2026.	Imported food products must adhere to stringent GCC standards, encompassing requirements such as product registration, Arabic labeling, including requirements such as product registration, and halal certification for meat products.
The food processing industry primarily depends on imported commodities and ingredients for its operations.	Freight volatility continues to pressure margins for processors and foodservice operators, making it hard to include them in overall running costs accurately. Recent disruptions in the Strait of Hormuz and the Red Sea have driven up shipping costs.
The UAE's emphasis on food security is expected to stimulate the growth of the food processing industry and enhance the import of food ingredients into the country.	Lack of interest from some U.S. exporters who are not willing to entertain small orders and consolidate shipments.
Preference for U.S. products due to their safety and high quality.	Competition from other countries, mainly Europe, Asia, Australia, and New Zealand due to price flexibility and lower freight costs.
Manufactured food products in the UAE outside of a free trade zone are exempt from customs duties between GCC countries.	New regulations for UAE food manufacturers: MOCCAE's new national food safety inspection system introduces risk-based inspections and a dedicated import control system, adding compliance steps for U.S. exporters.
The limited supply of agricultural land and water sources means a heavy reliance on imports, making the market ideal for importers.	Commissions from delivery platforms and packaging costs continue to pressure margins for processors and food service operators.
Expansion of food service, quick-commerce, and private label channels creates new demand for ingredients used in frozen meals, sauces, bakery, snacks, and prepared foods.	Price-sensitive consumers and high operating costs are pushing processors and food service operators to seek lower-cost suppliers and reformulate products.
Growing demand for "clean," functional, high-protein, plant-based, and traceable ingredients creates opportunities for innovative U.S. suppliers.	Operating costs, such as utilities or labor, can be high.

The local currency (Dirham) is stable, secure, and pegged to the U.S. dollar.	

SECTION II. ROADMAP FOR MARKET ENTRY

Entry Strategy

The Foreign Agricultural Service's Regional Office in Dubai (FAS Dubai) offers valuable resources to assist U.S. suppliers in staying informed and up to date about the latest news, trends, and regulations. U.S. suppliers are encouraged to conduct market research to assess the potential for their products in the UAE. It is advisable to gain an understanding of the overall business environment, market size, dynamics, consumption patterns, food import regulations, and procedures. Following a comprehensive market analysis, visiting the country and engaging directly with local industry stakeholders through in-person meetings is recommended.

Attending and participating in UAE trade shows is another good opportunity for U.S. suppliers to build contacts with the local industry and meet potential buyers. Gulfood is the world's largest annual food show and is attended by countries from the region and beyond. Gulfood Manufacturing is the largest trade show in the UAE that specializes in food ingredients for further processing.

Studying the import rules and procedures is also advisable to understand the company's entry point. Free zones allow companies to re-export products elsewhere or enter the country after obtaining local approval. Various locations to set up a company exist, and it is vital that companies study the benefits of each location and decide based on a careful assessment of their needs. Examples include Dubai Industrial City, Khalifa Economic Zones Abu Dhabi (KIZAD), Sharjah Food Park, and Jabil Ali Free Zone (JAFZA) and Dubai's Food Tech Valley, a newer zone developed by MOCCAE and developer Wasl that is geared specifically toward food production, processing, and agtech companies. Many local distributors, such as Al Seer, Lulu, and Choithrams can be valuable partners for companies looking to enter the market. Barakat Fruits and Vegetables Co. is another distributor worth noting for produce-focused suppliers specifically.

Import Procedures

In 2025 the UAE's seaports received over 60 percent of cargo destined for the GCC. The UAE has 12 commercial trading ports (Table 2). Among its many ports, Jebel Ali Port in Dubai stands out as the largest and busiest in the Middle East. Operated by DP World, Jebel Ali offers extensive container handling capabilities, cold storage facilities, and direct access to the Dubai Industrial City and JAFZA Free Zone, making it highly efficient for food processing companies that handle perishable or bulk goods. Its connectivity to over 180 shipping lines and advanced customs systems ensure that shipments are processed quickly and reliably. With its prime location between Asia, Europe, and Africa, the UAE has developed a world-class maritime infrastructure that supports seamless import and export activities. Regional shipping conditions in the Gulf have been more variable than usual in 2026. Jebel Ali's throughput has fluctuated due to regional tensions around the Strait of Hormuz since March 2026, affecting shipping patterns and vessel routing in the Gulf. Khalifa Port is another strategic hub but has also been affected by challenges in the Strait of Hormuz.

Table 2: UAE Trading Ports

Name	Location	Key Features
Jebel Ali Port	Dubai	World's ninth-largest container port, handling 14.47 million TEUs
Khalifa Port	Abu Dhabi	Handles 4.91 million TEUs
Port Khalid	Sharjah	Handles 2.5 million TEUs, a deepwater port
Khor Fakkan Port	Sharjah	Natural deepwater port
Mina Saqr Port	Ras Al Khaimah	Bulk cargo specialist
Fujairah Port	Fujairah	Key oil bunkering port
Zayed Port	Abu Dhabi	General cargo port
Mina Al Hamriya	Dubai	Bulk and breakbulk cargo
Mina Rashid	Dubai	Dedicated to cruise tourism
Shahama Port	Abu Dhabi	General cargo port
Musaffah Port	Abu Dhabi	Industrial port

Dubai is a regional trade hub and center of international exhibitions and events. Around 75 percent of shipping volume into the UAE arrives via Dubai's ports. Regulations and registration procedures vary between each emirate:

- Abu Dhabi: National Food Safety and Abu Dhabi Food Control Authority
- Dubai: Dubai Customs, Food Control Department, and Dubai Municipality

For more information about regulatory requirements related to the importation and sale of agricultural goods for the UAE, it is recommended to review FAS Dubai's Food and Agricultural Import Regulations and Standards (FAIRS) Report, and the FAIRS Export Certificate Report.

Distribution Channels

The primary distribution channels within the UAE's food processing sector are outlined below (Table 3). The UAE has one of the Middle East's most advanced food distribution and logistics networks, supported by world-class ports, airports, free zones, and warehousing infrastructure, enabling manufacturers to efficiently source raw materials, distribute finished products domestically, and re-export goods throughout the GCC, Middle East, Africa, and South Asia. Several large food and beverage manufacturers in the UAE typically source agricultural raw materials directly from international suppliers, leveraging their scale and networks to maintain a steady supply chain. In contrast, smaller processors often rely on local importers or consolidators to obtain ingredients, reflecting a more cost-effective and flexible approach. Producers of essential food items primarily target the domestic market, while those manufacturing non-essential products concentrate on export markets. Manufacturers are increasingly seeking suppliers capable of providing consistent quality, internationally recognized food safety certifications, and a reliable year-round supply. This makes U.S. ingredients particularly competitive in premium food categories.

Table 3: Distribution Channel Types

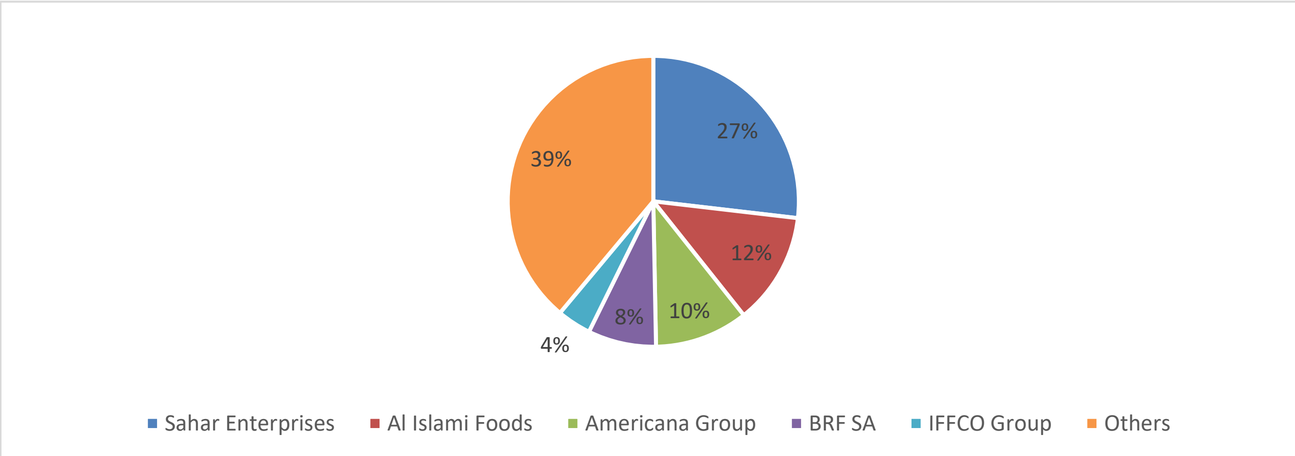
Type	Company Examples
Commercial agents and distributors	Al Seer Group, Truebell, Gulf & Safa Dairies
Retail and wholesale trade	Carrefour, Lulu, Union Coop, Al Maya
E-commerce and online sales	Kibsons, Amazon UAE, Talabat Mart, Noon Minutes, Careem Groceries
Food service distributors	Chef Middle East, Bidfood UAE, Aramtec, Fresh Express
Free zones and direct sales	JAFZA, KEZAD, Dubai Industrial City, Dubai South, Sharjah Airport International Free Zone (SAIF Zone)
Franchising and licensing	Americana, Alshaya

The UAE's free zones, including JAFZA, KEZAD, and Dubai Industrial City, attract both domestic and international food manufacturers. These zones offer integrated logistics, customs facilitation, and access to regional export markets. As a result, many multinational food companies establish their regional headquarters and distribution centers in the UAE, solidifying the country's position as the primary hub for food trade and re-export in the GCC region.

Major Segments in Food Processing

The most significant segments of food processing in the UAE are meat processing, seafood processing, dairy, nuts, and baked products. The processed meat, seafood, and alternatives category reached $434 million in retail value sales in 2025, up 7 percent from the year before. Meat and seafood substitutes also grew 7 percent to reach $2.45 million, It still represents a small portion of the overall market, but it points to steady consumer interest in plant-based protein. Figure 1 below presents the market share distribution among key players in the UAE’s processed meat and seafood sectors. The figure highlights the dominant companies leading in market penetration and brand recognition.

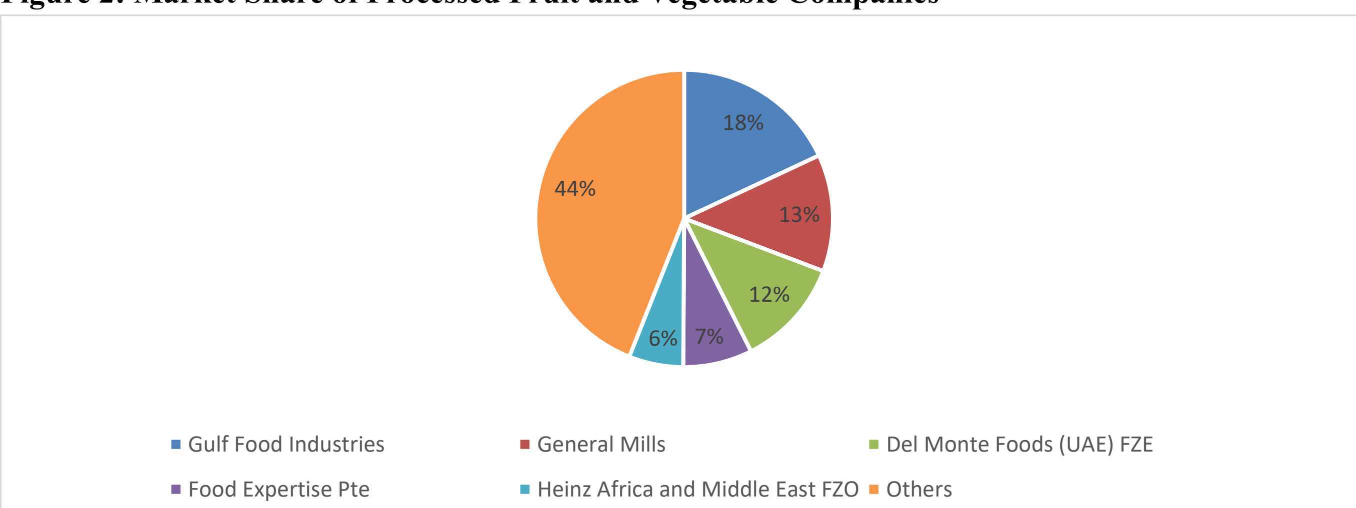
Figure 1: Market Share of Processed Meat and Seafood Companies



Source: Euromonitor

Prominent names like Nestlé Middle East FZE and Heinz Africa and Middle East maintain a significant presence alongside regional companies like IFFCO and Al Dahra Agricultural Company in processing for fruits and vegetables (Figure 2). The chart underscores a steady demand for convenient, shelf-stable products across retail and food service channels. With the UAE importing a wide range of processed fruits and vegetables to meet year-round demand, this segment offers reliable opportunities for U.S. suppliers. According to Euromonitor, retail sales of processed fruit and vegetables increased to $288 million in 2025, representing 8 percent growth. Frozen fruit and vegetables are also a growing subcategory, increasing 9 percent to $95.3 million as consumers increasingly view frozen products as nutritious, convenient, and way to reduce food waste. Gulf Food Industries, through its California Garden brand, remained the category leader.

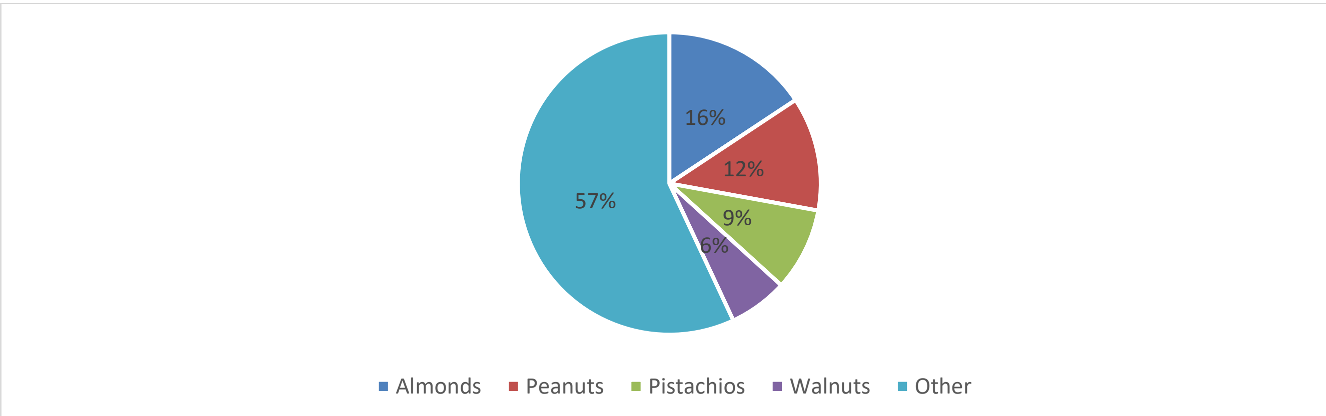
Figure 2: Market Share of Processed Fruit and Vegetable Companies



Sources: Euromonitor

The demand for nuts has increased in the UAE, with major processors like Savola Group and Bayara FZE, Al Fustaq Foodstuff, and Al Homaizi Nuts and Foodstuff Co. owning the most significant market share. According to Euromonitor, the UAE continued to experience strong demand for tree nuts, in both retail consumers and the food manufacturing sector. Total tree nut sales reached approximately 126,000 MT in 2025, an increase of 6 percent over 2024 and retail value sales increased to $789.7 million. Tree nuts remain one of the United States' strongest agricultural export categories to the UAE, supplying manufacturers, bakeries, confectionery producers, retailers, and the hospitality sector. Figure 3 shows the volume and category breakdown.

Figure 3: Volume of Nuts Imported to the UAE by Category



Source: Euromonitor

Market Structure

The market structure between U.S. suppliers and the UAE entails a multifaceted flow of goods from production to consumption. Beginning with U.S. suppliers, a chain of intermediaries facilitates the importation process, starting with importers, consolidators, and traders. Food processors play a crucial role by transforming raw materials and serving domestic and international markets. Within the UAE, products reach consumers through various food service and retail channels. Additionally, some food processors in the UAE export their products to global markets, offering opportunities for U.S. suppliers to access these markets indirectly.

Company Profiles and Company Products

According to Dubai Municipality, the emirate cleared 173,775 food shipments through Dubai's ports in the first half of 2025, representing 4.9 million tons. According to Dubai International Chamber, citing Euromonitor, Dubai's food and beverage sector attracted $576 million in new facility investment between 2021 and 2025. These figures point to a food sector still expanding on both the supply and demand. The UAE has more than 2,200 food and beverage manufacturing companies. The country also hosts over 570 food and beverage processing facilities, mostly small and medium-sized enterprises.

Dubai leads with 315 food and beverage factories while the remainder are spread across the other six emirates. The Ministry of the Economy offers additional details on the UAE's export economy while Table 4 details a select group of the largest food processors covering different sectors.

Table 4: Profiles of Food Processing Companies

Company	Annual Revenue	Product
Al Ain Farms	Not disclosed	Fresh dairy products, juice, camel milk, poultry, and eggs
Al Khaleej Sugar	Not disclosed	Refined white sugar, liquid sugar, sugar syrup, and sugar-related by-products
National Food Products Company	Not disclosed	Drinking water, dairy products, juice, bakery products, and other beverages
Al Rawabi Dairy Company	Not disclosed	Fresh dairy products, juice, and functional dairy products
Agthia Group	$1.32 billion	Food and beverages
Almarai	$5.9 billion	Dairy, juice, bakery products, poultry, infant nutrition, and foodservice products
Al Dahra Agricultural Company	Not disclosed	Animal feed, forage, grains, rice, flour, fruits, vegetables, and agricultural commodities
Barakat Quality Plus	Not disclosed	Fruit and vegetables, juices, smoothies, salads, and foodservice products
Al Foah	Not disclosed	Dates processing and packaging company
Emirates Food Industries	Not disclosed	Animal Feed Production, Dairy Farming, Consumer Food Products
Dubai Refreshments (P.S.C.)	Not disclosed	Beverages
United Foods UAE	Not disclosed	Edible oils, ghee, butter, and margarine

Sources: Saudiexchange.sa and ADX.ae

Sector Trends

The food processing sector in the UAE is continuously growing and is significant in the overall government efforts to enhance food security. It is projected to gradually increase in the coming years. Demand for cooking ingredients and meals continues to grow, driven by health, convenience, sustainability, and value-seeking behavior. According to Euromonitor, retail value sales increased by 7 percent in current terms in 2025 to $925.8 million. Retail e-commerce food sales reached $1.41 billion in 2025, with food and drink categories seeing double-digit growth driven by efficient logistics, product variety, and aggressive promotions. Fresh food sales more than tripled between 2020 and 2025, rising from 2.3 percent to 7.6 percent of retail volume, while e-commerce penetration in processed fruit and vegetables nearly doubled over the same period, from 2.0 percent to 3.6 percent, and in processed meat, seafood, and alternatives rose from 4.4 percent to 5.0 percent.

SECTION III. COMPETITION

The food processing sector in the UAE is heavily reliant on imported raw materials due to the limited capacity of domestic agricultural production. Eighty percent of products in the UAE market are imported, and the country is a major re-export hub in the region. Key competitor nations for sourcing bulk products include India, Australia, and Canada, with India alone accounting for more than $1.1 billion in bulk exports to the UAE in 2025, up 70 percent year-over-year. In the dairy industry, local farms primarily concentrate on the production of fresh dairy items; however, they face substantial competition from imported processed products. The UAE's Federal Competitiveness and Statistics Centre and FAS's Global Agricultural Trade System provide greater granularity on the country's trade.

SECTION IV. BEST PRODUCT PROSPECTS

The UAE market offers strong opportunities for U.S. agricultural exporters, even in well-established categories. For instance, while U.S. dairy exports to the UAE reached $62.3 million in 2025, they were still a small portion of the total dairy imports. This gap points to significant growth potential for U.S. products, especially given their reputation for safety and quality. Despite competition from the EU and neighboring countries, consumer interest in premium and healthy products continues to open doors for U.S. brands.

Table 5: Products Present in the Market That Have Good Sales Potential

Product Category	2025 U.S. Exports	2025 Total Exports to the UAE	Key Constraints for Market Development	Market Attractiveness for U.S. Exporters
Dairy products	$62.3 million	$2.37 billion	High competition from the EU and a lack of consumers' awareness of the wide variety of U.S. dairy products.	The growing U.S. portfolio of high-quality dairy ingredients and the UAE's large import of dairy products provide U.S. dairy products significant potential.
Fresh fruits	$36.4 million	$1.43 billion	Price competition from neighboring countries.	Growth of health awareness and consumer preference for fresh and healthy products.
Poultry meat and products	$91.2 million	$1.41 billion	High competition from Brazil and U.S. packaging sizes and practices	U.S. competitive price and high quality for chicken leg quarters.

			prevents higher market penetration.	
Bakery goods, cereals, and pasta	$35.8 million	$937 million	Strong competition from the EU and Saudi Arabia, which have large productions and competitive prices.	Preference for U.S. products due to their safety record and high quality.

Source: Trade Data Monitor

Some U.S. products are not yet fully present in the UAE but show considerable promise. One standout is roasted coffee and extracts, where the UAE imported $341 million worth in 2025, but U.S. exports accounted for just $5.8 million of the total. With the rapid growth of coffee shop culture and premium cafes in the UAE, this segment represents a prime opportunity for U.S. exporters to make inroads in a thriving and trend-sensitive market. Table 6 below shows products with good sales potential.

Table 6: Products Not Present in Market with Good Sales Potential

Product Category	2025 U.S. Exports	2025 Total Exports to the UAE	Key Constraints for Market Development	Market Attractiveness for U.S. Exporters
Dog and cat food	$4.6 million	$108 million	High competition from the EU and price competition with lower quality brands.	Growing number of pet owners in the UAE.
Coffee, roasted and extracts	$5.7 million	$341 million	Price competition from other coffee-producing countries.	Growing number of coffee shop chains in the UAE.
Nursery products and cut flowers	$2.9 million	$208 million	Lack of awareness of U.S. suppliers.	Growing number of hotels and landscaping areas in the UAE.

Sources: Euromonitor and Trade Data Monitor

There are no products that are absent from the UAE market due to significant barriers. However, the country maintains a comprehensive list of banned items. This list includes goods whose imports and exports are either restricted or entirely prohibited, necessitating prior approval from the relevant authorities. This list of top companies (Table 7) provides a valuable starting point for U.S. businesses looking to establish strategic partnerships or distribution networks in the region.

Table 7: Links to Top Food Processing Companies

Name	Sector	URL
Gulf Food	Fruit and vegetables	www.californiagarden.com

Industries		
General Mills Inc	Fruit and vegetables	www.generalmills.com
Del Monte Foods (UAE)	Fruit and vegetables	www.me.freshdelmonte.com
Heinz Africa and Middle East	Fruit and vegetables	www.kraftheinzcompany.com
Sahar Enterprises LLC	Meat, seafood, and alternatives to meat	www.foodubai.com
Al Islami Foods	Meat, seafood, and alternatives to meat	www.alislamifoods.com
Americana Group	Meat, seafood, and alternatives to meat	www.americanafoods.com
McCain Foods Ltd.	Fruit and vegetables	www.mccain.com
Nestlé Middle East FZE	Fruit and vegetables	www.nestle-mena.com
BRF	Meat, seafood, and alternatives to meat	www.brf-globalbr.com

SECTION V. KEY CONTACTS AND FURTHER INFORMATION

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USDA Cooperators, State and Regional Trade Groups, and Chambers of Commerce

U.S. State Regional Trade Groups
American Business Council of Dubai and the Northern Emirates
Abu Dhabi Chamber of Commerce and Industry
Dubai Chamber of Commerce and Industry
United Arab Emirates: FAIRS Country Report Annual

Attachments:

No Attachments