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Report Name: Djibouti Food and Agricultural Market Snapshot

Country: Djibouti

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Report Highlights:

Djibouti imports nearly 90 percent of its food supply due to its arid climate, limited arable land, and constrained domestic agricultural production. Growing demand from modern supermarket chains, hotels, restaurants, institutional buyers, military facilities, and expatriate communities creates opportunities for U.S. beef, poultry, dairy, packaged foods, beverages, and other consumer-oriented goods. In addition, Djibouti's port infrastructure, free-zone facilities, and regional transport links offer potential for distribution, cargo consolidation, and re-export to neighboring markets.

THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT POLICY

Background

Djibouti is a strategically located, service-driven economy at the southern entrance to the Red Sea, serving as a major trade and logistics hub for the Horn of Africa and the principal maritime gateway for landlocked Ethiopia. With a population of approximately one million people, GDP of $4.62 billion, and estimated real GDP growth of 6.0 percent in 2026, Djibouti's economy benefits from port operations, transportation, transshipment, and regional trade. Agriculture contributes less than five percent of GDP due to an arid climate, limited arable land, scarce water resources, and extreme heat that constrain domestic food production. Djibouti imports roughly 90 percent of its domestic food needs. Its modern ports and logistics hubs offer U.S. agricultural exporters opportunities to supply bulk, intermediate, and consumer-oriented products, with potential access to wider regional distribution networks.

Figure 1: Djibouti's Trade Indicators for Calendar Year 2025

Trade Indicators

$6.3 billion Total Goods Imports from the World	**$6.1 billion** Total Goods Exports to the World
$151.3 million U.S. Goods Exports	**$49.3 million** U.S. Goods Imports
$19.0 million U.S. Agricultural Exports	**$1.0 million** U.S. Agricultural Imports

Source: USDA/GATS, USTR, and Lloyds Bank

Market Overview

High Dependence on Food Imports: Djibouti represents a small but strategic, highly specialized import market located at the juncture of the Red Sea and the Gulf of Aden. Due to hyper-arid climatic conditions, extreme temperatures, and severe water scarcity, less than 0.1 percent of Djibouti's total land area is arable. As a result, domestic agricultural output meets roughly 10 percent of national food requirements, leaving the country heavily dependent on imports.

Fixed Exchange Rate with the U.S. Dollar: Unlike many developing regional markets exposed to significant exchange-rate volatility, Djibouti maintains a currency board arrangement under which the Djibouti franc is officially pegged to the U.S. dollar at a fixed rate of 177.72 DJF to 1 USD. This direct

monetary peg ensures currency stability, reduces foreign exchange conversion risk for U.S. agribusinesses, and facilitates cross-border trade.

Expatriate Purchasing Power and Military Procurement: Djibouti hosts a substantial, permanent foreign presence comprising several major international military installations, including U.S., French, Japanese, and Italian bases. This demographic, combined with an expanding community of diplomatic personnel, port executives, and international contractors, forms a consumer base with strong purchasing power that actively drives retail demand for high-quality food products.

Regional Gateway and Transshipment Hub: Anchored by the Port of Djibouti, the Doraleh Multipurpose Port, and the Djibouti International Free Trade Zone (DIFZ), Djibouti operates as a commercial maritime hub for East Africa. It acts as the primary re-export trade corridor for landlocked Ethiopia, a market exceeding 135 million consumers, making Djibouti a strategic hub for regional warehouse storage and transshipment operations.

Retail and Commercial Sector Structure

Modern Retail Channel (Supermarkets and Hypermarkets)

Modern grocery retail is concentrated in Djibouti City, home to roughly 70 percent of the nation's population. This channel primarily serves upper-middle-class consumers, foreign military personnel, and expatriate workers. Major retailers including Al-Gamil hypermarket, Geant hypermarket, Casino supermarket, and Cash Center offer modern cold-chain facilities and dedicated shelf space for products imported from Europe, the Middle East, Asia, and other regions. Key opportunities for U.S. exporters include branded breakfast cereals, snack foods, condiments, tree nuts, juices, fresh fruits, dairy, poultry, beef, spirits, and specialty health foods.

Traditional Wholesale and Retail Channels

Traditional open-air markets alongside thousands of neighborhood kiosks account for the vast majority of volume sales to local Djiboutian households. Consumers in this segment are price-sensitive, with purchasing focused on affordable major staples including rice, refined sugar, wheat flour, vegetable cooking oils, dried pulses, and lentils.

Hotel, Restaurant, and Institutional (HRI) Foodservice Segment

The HRI foodservice sector is driven by diplomatic missions, military dining facilities, international conference events, business travelers, and port logistics workers. This segment targets reliable supplies of frozen poultry cuts, premium beef cuts, butter, ultra-high temperature (UHT) milk, cheese, fresh fruits, and non-perishable food ingredients. U.S. fast-food and restaurant franchise brands, Burger King, Pizza Hut, and Cold Stone Creamery, have already established a presence in the Djiboutian market. Djibouti's hospitality sector also includes few internationally affiliated hotel brands, notably Sheraton, Best Western Premier, Kempinski, and Ayla Hotels.

Table 1: Commercial and Retail Export Opportunities for U.S. Suppliers

Product Category	Commercial and Retail Target End-Users	U.S. Competitive Advantage
Poultry and beef (chicken and premium beef)	Military procurement contractors, international hotel chains, and supermarket chains.	Competitive pricing on bulk frozen poultry cuts; reputation for high-quality, premium products.
Grains and pulses (rice, wheat, dried beans, and lentils)	Commercial importers, and regional re-export traders.	Exceptional uniformity, strict grading standards, and reliable supply.
Dairy products (UHT Milk, cheese, powders)	Retail supermarket chains, local bakery processors, and hotel catering operations.	Extended shelf-life dairy powders, quality, packaging, and high food safety standards.
Processed goods (snacks, cereals, sauces)	Modern retail supermarkets catering to expatriates, military, and middle-class households.	Strong brand recognition, superior shelf stability, and appealing consumer packaging.
Fresh fruits, tree nuts, and dried fruit (apples, almonds, walnuts, raisins)	High-end retail outlets, health-conscious urban shoppers, and hotel foodservice.	Premium quality, long shelf-life, and non-perishable shipping advantages.
Planting seeds (hybrid vegetable and forage seeds)	Commercial greenhouse farms, local agricultural cooperatives, horticulture development programs, etc.	High germination rates, superior drought/disease resistance, and strict certification standards.

Key Retailers and Commercial Business Groups in Djibouti

Al-Gamil Group: Al-Gamil is one of Djibouti's premier commercial and industrial conglomerates. The group operates Al-Gamil Hypermarket, a major retail landmark supplying imported food products, fast-moving consumer goods (FMCG), household items, and wholesale food distribution.

Coubeche Group: Coubeche group is a long-established French affiliated business enterprise in Djibouti with diverse commercial activities spanning beverage manufacturing, logistics, cold storage, and retail trade. The group operates three major retail outlets in Djibouti: Geant hypermarket, Casino supermarket, and Cash Center.

Geant Hypermarket: Situated within Bawadi Mall—Djibouti's modern shopping destination—Geant hypermarket is a major retail operator owned by the Coubeche Group. It offers a broad selection of international food products including fresh produce, packaged grocery items, and other consumer goods to middle- and upper-income consumers.

Casino Supermarket: Owned by the Coubeche Group, this supermarket operates under the international Casino brand umbrella. The retail outlet caters to urban consumers and expatriate communities in Djibouti. The grocery store includes imported European and other international food products such as fresh fruits, bakery items, dairy, alcoholic and non-alcoholic beverages, and consumer packaged goods.

Cash Center: Operates under the Coubeche group and in partnership with Leader Price, Cash Center is one of Djibouti's leading modern retail grocery chains. The supermarket specializes in high-quality

imported European and international fast-moving consumer goods including dry, fresh, and frozen foods.

These major retail groups cater to a concentrated customer base of affluent urban residents, foreign diplomats, and multinational military personnel. For U.S. exporters, this segment offers the most viable and reliable entry point for high-quality U.S. food commodities.

General Regulatory Entry Requirements

Customs and Sanitary Clearance: Customs declarations require official Sanitary and Phytosanitary and Halal certificates. Tax-exempt shipments require an approved Exemption Letter.

Sanitary and Phytosanitary Certification: All poultry, beef, and egg product shipments to Djibouti require USDA/FSIS health inspection certificates. Live animal, genetics, and plant products require USDA/APHIS health certificates. For a complete list of health certificates required for exporting U.S. livestock, livestock genetics, and poultry to Djibouti, refer to the USDA/APHIS Djibouti Export Regulations.

Halal Certification: Imported meat and animal-derived products must be accompanied by official Halal certification from an accredited certifying body. The Islamic Food and Nutrition Council of America (IFANCA) provides official halal certification through various programs.

Labeling Standards: French or Arabic labeling is preferred for retail products imported into Djibouti. However, dual-language adhesive sticker labels (English/French or English/Arabic) applied prior to customs clearance are fully compliant and accepted by regulatory authorities.

Market Entry Recommendations for U.S. Exporters

Leverage Established Business Conglomerates: Form commercial partnerships with leading Djiboutian business conglomerates such as Al-Gamil and Coubeche Groups to capitalize on their end-to-end import, wholesale, and retail distribution capabilities.

Partner with Established Local Distribution Networks: Establish formal commercial relationships with experienced Djiboutian import-distributors who maintain active port clearance licenses, bonded cold-storage facilities, and direct delivery channels to modern supermarket chains. Key domestic importers and wholesale partners in Djibouti include Dania Trading, GlobAfrica Group, and Osma Trading.

Leverage Free Zone Infrastructures for Re-Export: Importers can utilize bonded warehousing within the Djibouti Free Zone (DFZ) to store bulk product duty-free, enabling rapid re-export and distribution across the Horn of Africa region. BMMI Djibouti, operating primarily out of the DFZ as a contract logistics provider and cold-chain distribution hub presents a strategic local partner for U.S. bulk exporters and importers seeking cargo consolidation, FMCG storage, and regional supply chain integration. A significant share of bulk imports, such as sugar, rice, wheat, and cooking oils, are re-exported to Ethiopia

Table 2: U.S. Agricultural and Related Exports to Djibouti: CY 2021-2025 (millions USD)

Category	2021	2022	2023	2024	2025
Bulk	$47.9	$48.8	$35.8	$14.8	$4.4
Intermediate	$26.6	$11.5	$14.8	$18.4	$13.8
Consumer-oriented	$0.9	$1.0	$0.5	$0.7	$0.8
Total	**$75.4**	**$61.3**	**$51.1**	**$33.9**	**$19.0**

Source: USDA, Global Agricultural Trade System (GATS)

Note: U.S. agricultural exports to Djibouti are predominantly driven by humanitarian food aid programming, with commercial sales representing a smaller share. Refer to Annex 2 for U.S. official trade data presented by specific product category.

Annex 1: Djibouti's Major Import Trade Partners and Import Values in CY 2025

S/N	Trading Partner	Total Import (Millions USD)	Major Imports
1	India	$361.1	Sugar ($192.9), rice ($126.7), lentils ($19.7), peanuts ($2.3), and spices ($1.3).
2	Turkiye	$353.3	Sunflower oil ($309.8) wheat flour ($13.7), dried peas ($15.5), uncooked pasta ($2.7), and fresh eggs ($1.9).
3	Indonesia	$278.6	Palm oil ($255.8), edible mixtures of fats & oils ($10.3), industrial fatty acids ($5.0), glycerol ($4.1), and black & white pepper ($0.8).
4	Malaysia	$250.3	Palm oil ($234.7), vegetable oils & fats ($9.7), milk and cream powder ($3.6), edible mixtures of fats & oils ($0.7), and refined coconut oil ($0.6).
5	EU 27 External Trade (Brexit)	$157.8	Wheat and meslin ($60.4), flax, broken or scutched ($22.2), food preparations ($8.7), sawn or chipped spruce & fir wood ($8.2), and infant food preparations ($6.6).
6	Ethiopia	$128.1	Fresh or chilled vegetables ($91.1), live sheep ($8.1), fresh lettuce ($2.4), frozen potatoes ($2.2), and live camels ($2.2).
7	Saudi Arabia	$38.7	Refined sugar ($16.0), dates ($4.1), sweetened or flavored waters ($3.8), frozen sheep carcasses & half-carcasses ($2.7), and sweetened milk & cream ($2.0).
8	Pakistan	$35.3	Rice ($31.0), other wood products ($2.0), refined sugar ($0.7), malt extract & other food preparations ($0.6), and ethyl alcohol ($0.3).
9	Brazil	$19.6	Refined cane or beet sugar ($13.9), whole frozen chicken ($4.1), frozen chicken cuts & edible offal ($0.7), cloves ($0.4), and sugar confectionery ($0.3).
10	United States	$19.1	Malt extract & other food preparations ($13.8), cotton ($2.4), dried peas ($1.8), frozen chicken cuts & edible offal ($0.3), and rice ($0.3).

Source: Trade Data Monitor, LLC

Annex 2: U.S. Agricultural and Related Exports to Djibouti

U.S. Exports of Agricultural & Related Products to *Djibouti*
CY 2021 - 2025 and Year-to-Date Comparisons
(in millions of dollars+)

Export Market: *Djibouti*

Product	Calendar Years (Jan-Dec) 2021	2022	2023	2024	2025	January - August Comparisons 2025	2026	%Chg
Bulk Total	48.0	48.8	35.8	14.8	4.4	3.9	1.3	-67.3
Wheat	34.0	27.4	0.0	0.0	0.0	0.0	0.0	-
Coarse Grains (excl. corn)	3.0	14.0	23.7	7.3	0.0	0.0	0.0	-
Rice	0.0	0.0	1.7	0.3	0.3	0.3	0.0	-
Cotton	1.0	1.7	4.1*	2.9	2.4	1.8	1.3	-30.8
Pulses	10.0	5.8	6.3	4.2	1.8	1.8	0.0	-
Intermediate Total	27.0	11.5	14.8	18.4	13.8	13.8	0.1	-99.6
Milled Grains & Products	0.0	0.4	0.0	0.1	0.0	0.0	0.0	-
Vegetable Oils (excl. soybean)	19.0	7.8	11.9	10.5	0.0	0.0	0.0	-
Hides & Skins	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Planting Seeds	0.0	0.1	0.0	0.0	0.0	0.0	0.0	-
Sugar, Sweeteners, Bev. Bases	0.0	0.1	0.0	0.1	0.0	0.0	0.0	290.0
Dextrins, Peptones, & Proteins	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Essential Oils	0.0	0.0	0.1	0.0	0.0	0.0	0.0	-
Other Intermediate Products	7.0	3.1	2.9	7.7	13.8	13.8	0.0	-99.9
Consumer Oriented Total	1.0	0.9	0.5	0.7	0.8	0.2	1.9	837.3
Beef & Beef Products	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Pork & Pork Products	0.0	0.0*	0.0	0.0	0.0	0.0	0.0	139.2
Poultry Meat & Prods. (excl. eggs)	0.0	0.3	0.1	0.1	0.3*	0.1	0.2	223.4
Meat Products NESOI	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Dairy Products	0.0	0.2	0.2	0.1	0.1	0.0	0.2	289.2
Fresh Fruit	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Processed Fruit	0.0	0.0	0.0	0.1*	0.0	0.0	0.0	-
Processed Vegetables	0.0	0.0	0.0	0.2*	0.0	0.0	0.0	-
Confectionery	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Chocolate & Cocoa Products	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Bakery Goods, Cereals, & Pasta	0.0	0.0	0.0	0.0	0.0	0.0	0.1	670.7
Food Preparations	0.0	0.3	0.0	0.2	0.1	0.0	1.2	-
Condiments & Sauces	0.0	0.1	0.0	0.0	0.1	0.0	0.1	50.8
Non-Alcoholic Bev. (excl. juice)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Wine & Related Products	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Dog & Cat Food	0.0*	0.0	0.0	0.0	0.0	0.0	0.0	-
Other Consumer Oriented	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Agricultural Related Products	0.0	0.1	0.0	0.3*	0.0	0.0	0.0	-
Forest Products	0.0	0.1	0.0	0.2	0.0	0.0	0.0	-
Seafood Products	0.0	0.0	0.0	0.1*	0.0	0.0	0.0	-
Agricultural Products	75.0	61.2	51.1	33.8	19.1	17.9	3.2	-82.3
Agricultural & Related Products	75.0	61.3	51.2	34.1	19.1	17.9	3.2	-82.3

Prepared By: Trade & Economic Analysis Division/GMA/FAS/USDA
Source: U.S. Census Bureau Trade Data
* Denote Highest Export Levels Since at Least CY 1970
www.fas.usda.gov/GATS
GATSHelp@fas.usda.gov
Biodiesel aggregate includes only higher-level and pure biodiesel HTS chapter 38 codes; biodiesel blends below 30% by volume (aka. petroleum oils containing biodiesel) found in chapter 27 are excluded.

Source: USDA, Global Agricultural Trade System (GATS)

Attachments:

No Attachments.