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Report Highlights:

The United States maintained its position as a key supplier of consumer-oriented agricultural products to the United Arab Emirates (UAE), accounting for \$1.2 billion in exports—7.3 percent of the UAE's total consumer-oriented agricultural imports, which reached \$16.2 billion, reflecting strong growth of nearly 14 percent compared to 2023. Demand for American products remains robust across categories including tree nuts, poultry, beef, and dairy. The UAE's growing reliance on imports stems from limited local agricultural production, sustained economic growth, and expanding trade partnerships. The retail food sector is rapidly growing, driven by a rising population of 11.3 million in 2024, increasing incomes, and demand for affordable, convenient, and healthier food options. The online grocery market expanded 13 percent year-over-year to \$1.1 billion in 2024 and is expected to grow further in 2025. Viva, the UAE's only discounter with full market share, continues to expand.

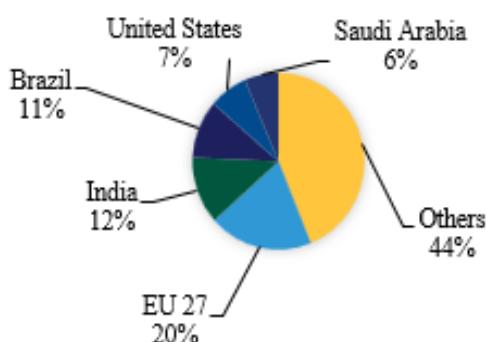
MARKET FACT SHEET: UNITED ARAB EMIRATES

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 \$548.6 billion and a projected growth rate of 3.7 percent in 2025. Foreign nationals comprise almost 89 percent of the population. Approximately 80 percent of the UAE's agricultural products are imported. In 2024, the United States exported \$1.4 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.

Consumer-Oriented Agricultural Imports

The UAE imported \$16.2 billion in consumer-oriented products in 2024. Primary suppliers are the European Union, India, Brazil, the United States, and Saudi Arabia. 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, and tree nuts.



Food Retail Industry

The UAE's food e-commerce retail sales reached \$1.1 billion in 2024. The UAE's grocery retail market had a total revenue of \$18 billion in 2024.

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

The UAE food service market was valued at \$8.5 Billion in 2024 and is projected to reach \$14.2 Billion by 2032, growing at a compound annual growth rate of 6.25 percent from 2025 to 2032.

Quick Facts in 2024

Consumer-Oriented Products Total Imports:
\$16.2 billion

Top 10 Consumer-Oriented Products Imports

Dairy	\$2 billion
Beef and beef products	\$1.6 billion
Poultry meat and products	\$1.3 billion
Fresh fruit	\$1.2 billion
Tree nuts	\$1.1 billion
Bakery Goods	\$857 million
Soup and Food Preparations	\$832 million
Spices	\$695 million
Chocolate and Cocoa Products	\$663 million
Fresh Vegetables	\$597 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: \$548.6 billion

GDP per capita: \$53,916

Population: 11.35 million

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

Strengths/Weaknesses/Opportunities/Threats

Strengths	Weaknesses
UAE is a modern transit hub for the Middle East and North Africa (MENA) region	Specialized labeling and restrictive shelf-life requirements
U.S. products considered high quality	Long shipping time and high freight costs
Opportunities	Threats
Import regulations transparent, straight-forward	Regulations evolve, subject to change without notice
High incomes create demand for diverse and high-quality food.	Close to India, Europe, and MENA suppliers with lower costs.

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SECTION I. MARKET 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 \$548.6 billion and a projected growth of 3.7 percent in 2025¹. Its population reached 11.3 million in 2024, reflecting a 5.7 percent increase from 2023², with foreign nationals comprising nearly 89 percent, creating a diverse and dynamic consumer base.

Limited domestic agriculture means about 80 percent of the UAE's agricultural products are imported, with consumer-oriented food products making up 64 percent in 2024. Total imports of these products reached \$16.2 billion, a 13.7 percent increase over 2023³, driven by tourism, food security government initiatives, supply chain stabilization, strong hiring, and new trade agreements. The United States supplied \$1.2 billion (7.3 percent) of these products⁴. UAE consumers widely trust American products for their quality across categories including tree nuts, poultry, beef, dairy, and food preparations among others.

The UAE retail food sector grew strongly in 2024, fueled by population growth, rising disposable incomes, urbanization, and evolving consumer preferences. Consumers increasingly prioritize value, convenience, private labels, fast online delivery, q-commerce formats, and healthier, high-quality options. Digital adoption and omnichannel retail experiences continue to transform consumer behavior. Over the past decade, the UAE's food retail sector has evolved with large hypermarkets, supermarkets, convenience stores, online retailers, and home delivery services. Urban retail hubs offer expansive malls with ample parking, products variety, and attractive in-store promotions, making hypermarkets and supermarkets preferred shopping destinations.

Food e-commerce grew from \$974 million in 2023 to \$1.1 billion in 2024, a robust 13 percent increase⁵, and is projected to reach \$1.22 billion in 2025. Growth is driven by consumers' preference for convenience, improvements in digital infrastructure, and evolving demand for seamless omnichannel experiences.

The UAE's strategic geographic location as a crossroads between East and West, and between the Middle East and North Africa, has long established it as a pivotal player in global trade. Over the past three decades, the country has developed a diverse economy supported by state-of-the-art airports and seaports, a business-friendly regulatory environment, low tariffs, and a vast network of free trade zones. These factors have cemented the UAE's status as a major global trade and re-export hub.

The retail industry serves four major consumer groups: the local Emiratis, Asian, Arab, and Western expatriates. Retailers must address varied preferences and incomes. In 2024, grocery retail sales reached \$18.2 billion, marking a 3.86 percent increase from 2023. Growth is expected to continue at around 3.15 percent in 2025⁶, reflecting the steady expansion of the retail food sector.

Recent legal reforms, including modernization of personal and family laws and long-term residency

¹ International Monetary Fund.

² International Monetary Fund.

³ Trade Data Monitor.

⁴ USDA Global Agricultural Trade System

⁵ Euromonitor

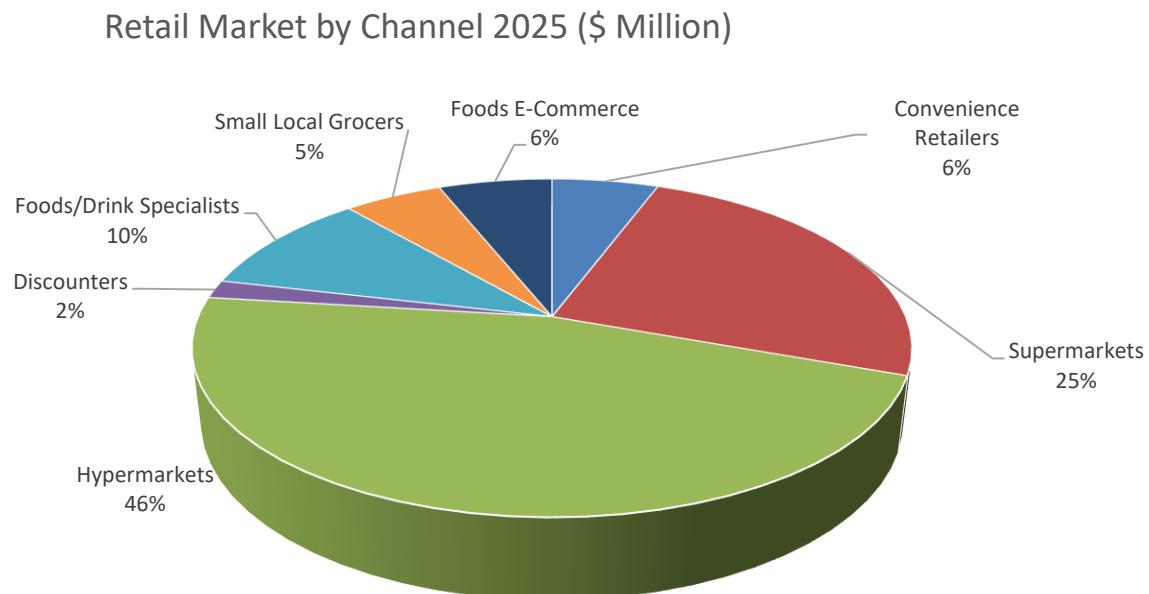
⁶ Euromonitor

options for high-end real estate investors, prominent investors, and artists, aim to attract affluent individuals. These measures support economic recovery and indirectly boost the food retail market through increased consumer spending power.

Table 1: Advantages and Challenges

ADVANTAGES	CHALLENGES
Retailers use foreign goods to differentiate, tap niche markets, and attract high-end consumers	Imported goods are seen as premium, and Europe's association with sophistication gives its brands an edge
Price is not always the determining purchasing criteria for high-end consumers.	High-end consumers seek innovation, premium packaging, status, and trends, while millennials expect greater product variety.
Importers constantly seek new-to-market products to keep their portfolios competitive.	Importers often buy small test quantities, but U.S. companies are typically reluctant to accommodate this.
The U.S. food industry can quickly meet consumer demand across all product segments.	Consumers perceive U.S. food products to be overly processed and relatively unhealthy.
U.S. exporters are inclined to work with high volumes and different partners.	Retailers and distributors tend to be cautious, starting with smaller orders.

Chart 1: Retail Market by Channel 2025



Source: Euromonitor

SECTION II. ROAD MAP FOR MARKET ENTRY

II-1. Entry Strategy

Entering the UAE food market requires a strategic approach that considers regulations, competition, and demand for high-quality, diverse, and health-conscious products. U.S. suppliers should conduct market research to target high-growth categories such as tree nuts, poultry, dairy, beef, pet food, and specialty items, while evaluating local preferences, pricing, and competition from global suppliers. Market entry often involves partnering with established distributors for smoother access to retail chains and food service operators, though some companies may also establish joint ventures or local offices. Tailored marketing such as bilingual packaging and emphasis on quality and health benefits can appeal to the UAE's culturally diverse and tech-savvy consumers. Continuous monitoring of market trends allows suppliers to adopt strategies and maintain a sustainable presence.

For assistance in connecting with established UAE import distributors and food retail buyers, it is recommended to contact the U.S. Department of Agriculture (USDA) Foreign Agricultural Service's (FAS) Regional Office of Agricultural Affairs in Dubai (contact details at end of this report). The office maintains a comprehensive regional importer directory that covers the UAE, Kuwait, Oman, and Qatar. FAS Dubai provides valuable guidance to U.S. suppliers, along with an array of marketing tools and trade facilitation support. For additional insight into market entry strategies and tools tailored to the UAE market, consult:

- [United Arab Emirates Exporter Guide](#): Food market sector overview, market structure, food import trends, exporter business tips, and market entry guidance.
- [United Arab Emirates FAIRS Report](#): UAE government regulations and standards on imported food and agricultural products.
- [UAE Country Commercial Guide](#): Published by the U.S. Commercial Service, this guide provides important information on the UAE market including import tariffs, customs regulations, trade barriers, and more.

II-2. Market Structure

In 2024, hypermarkets remained the leading grocery retail channel in the UAE, supported by their one-stop convenience, a growing population, and their ability to adapt to evolving consumer demand. However, they faced rising competition from discount retailers offering attractive prices, as well as supply chain challenges tied to the Red Sea security situation, which delayed shipments and increased transport and insurance costs. In response, many hypermarkets are expanding their focus on locally sourced produce, increasing shelf space for UAE-grown fruits and vegetables and imports from nearby countries. Carrefour has invested in indoor farming and strengthened partnerships with local suppliers, while LuLu Hypermarket launched the 'Al Emarat Awwal' (UAE First) initiative in Abu Dhabi to promote sustainable agriculture and support domestic farmers.

Supermarkets also saw steady expanding in 2024, driven by population growth and strategic partnerships that secured prime locations. Chains like LuLu Express broadened their footprint through smaller stores, while retailers enhanced omnichannel strategies to attract digital consumers and serve niche and eco-conscious segments. Private labels gained importance as supermarkets aimed to boost margins and loyalty while competing with discounters, offering affordable, high quality, and locally sourced products. Spinneys invested in sustainable food processing and increased storage capacity. Retail e-commerce became a key growth driver, with supermarkets strengthening their online

platforms and partnering with delivery services, supported by rewards and subscription models that encourage home delivery.

UAE discounters experienced rapid growth, driven by budget-conscious consumers shifting toward private label products. Viva, the country's sole discounter brand, led this growth with rapid expansion to 93 outlets, offering a wide range of private label items at competitive prices. Viva's success is likely to attract competitors, who will need strong supply chains, differentiated product ranges, and niche offerings to challenge its position. Although private labels are gaining popularity, brand reputation and quality remain crucial. Continued innovation through digital services and strategic partnerships will be key to maintaining a competitive edge as supermarkets and convenience stores expand.

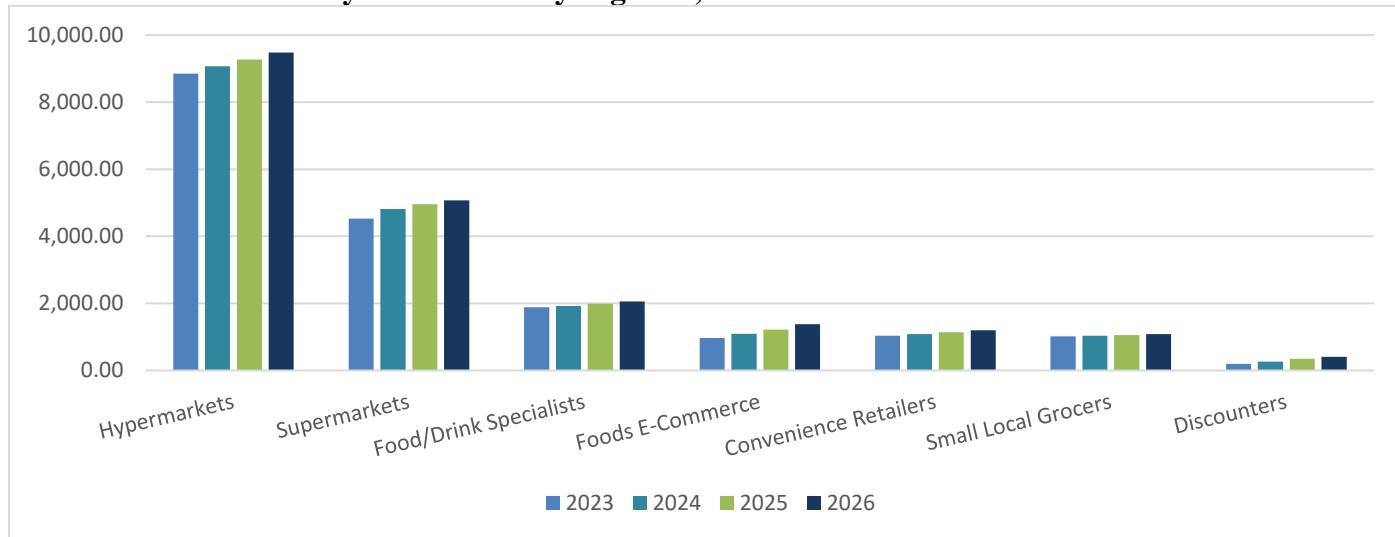
Food e-commerce in the UAE continued to thrive, driven by tech-savvy consumers, improved digital infrastructure, and expanding marketplace platforms like [Amazon](#), [Noon](#), [Talabat](#), [Instashop](#). Major grocery players, including [Carrefour](#), which has 32.8 percent of this category market share, boosted convenience by launching fast, 24/7 express delivery services featuring extensive product selections and loyalty rewards. Although growth is expected to slow as the market matures, ongoing government initiatives, investments in digital infrastructure, and innovations such as drone deliveries and subscription-based instant delivery services (e.g. Amazon Now) will sustain expansion and transform consumer shopping habits nationwide.

Table 2: Retail Value in Millions (USD)

Segment	2022	2023	2024	2025	2026
Hypermarkets	8,706.5	8,854.5	9,067.2	9,274.3	9,483.3
Supermarkets	4,302.4	4,526.5	4,817.8	4,955.8	5,076.1
Food/Drink/Tobacco Specialists	1,822.3	1,890.5	1,923.3	1,992.4	2,061.7
Foods E-Commerce	848.0	974.1	1,090.2	1,219.8	1,379.7
Convenience Retailers	985.4	1,037.4	1,087.7	1,141.0	1,197.3
Small Local Grocers	979.4	1,013.5	1,035.1	1,057.3	1,079.9
Discounters	117.1	196.8	265.2	347.6	403.1

Source: Euromonitor

Chart 2: Shifts in Sales by Retail Industry Segment, 2022-2026



Source: Euromonitor

II-3. Top Host Country Retailers & Company Profiles

Table 3: Major Hypermarkets in 2024

Brand/ Company Name	Chain Type	Market Share	Website
Carrefour	International	27.2	https://www.carrefouruae.com
LuLu Group International LLC	International	23.8	luluhypermarket.com
Nesto Hypermarket	International	10.2	https://nestogroup.com/
Union Co-operative Society	National	5.2	https://www.unioncoop.ae
Sharjah Co-operative Society	National	4.6	https://www.shjcoop.ae/
Al Madina Hypermarket	Regional	3.5	almadinahypermarket.com/
Emirates Cooperative Society	National	2.9	https://www.emcoop.ae/
Abu Dhabi Cooperative Society	National	2.5	https://abudhabicoop.com

Source: Euromonitor

Table 4: Major Supermarkets in 2024

Brand/ Company Name	Chain Type	Market Share	Website
Al Maya Supermarket	International	10.6	https://www.almaya.ae
West Zone	International	10.6	http://westzonefresh.com/
Al Madina	International	10.4	Almadina UAE
LuLu	National	10.3	luluhypermarket.com
Spinneys	National	9.0	https://www.spinneys.com
Buy 'N' Save	International	8.0	http://www.safeergroup.com
Carrefour Market	Regional	7.4	https://www.carrefouruae.com
Waitrose	National	6.9	https://www.waitrose.ae
Choithrams	National	5.3	https://www.choithrams.com

Source: Euromonitor

Table 5: Major Discounters in 2024

Brand/ Company Name	Chain Type	Market Share	Website
Viva	International	100	https://myviva.com/

Source: Euromonitor

Table 6: Major Convenience Retailers in 2024

Company or Brand	Chain Type	Market Share	Website
Zoom	National	29.3	https://www.enoc.com
ADNOC Oasis	National	24.2	https://www.adnocdistribution.ae
Fresh Plus	National	13.3	freshplus
Emarat	National	9.8	https://www.emarat.ae
Spinneys	National	4.2	https://www.spinneys.com
All Day Minimart	National	3.9	http://alldayuae.com/stores/
Circle K	National	1.5	
Carrefour City	International	1.0	https://www.carrefouruae.com
LuLu Mini Market	International	0.6	luluhypermarket.com

Source: Euromonitor

Top Five UAE Retailers in 2024

Carrefour: The UAE's largest hypermarket chain since 1995 operates 320+ stores across 12 countries under Majid Al Futtaim group. Serving 750,000+ daily customers. It offers food, non-food, and household products, with private labels 'First 1' and 'Carrefour Bio' for quality organic options.

LuLu Hypermarkets: Established in 2000 and part of Abu Dhabi-based Emke Group, is the UAE's second-largest food retailer with 260+ stores and an online platform. In 2024, it generated \$6.7 billion in revenue, drew 690,000 daily shoppers.

Nesto Hypermarket: Founded in 2004 by K.P. Basheer, has 100+ outlets across the GCC and India, covering over 6 million square feet. and attracting 250,000 daily customers, 75 percent of whom are repeat customers. The chain manages 600,000+ SKUs across its stores.

Union Cooperative Society: The UAE's largest consumer cooperative, offers food, non-food, and household products through 28 hypermarkets, seven commercial centers, and mini stores across Dubai. Founded in 1982 by ministerial decree to serve the local community, it has expanded offline and online, featuring the 'Tamayaz' loyalty program and a smart app with 203,000 users by 2024.

Sharjah Cooperative Society: Founded in 1977 as the UAE's first cooperative. It operates 60+ outlets, including hypermarkets, supermarkets, and mini stores, with its own private label "Sharjah Coop" and an online store.

II-4. Import Procedures

For a detailed overview of the UAE's food import procedures, including registration, licensing, labeling certification, customs clearance, and regulatory requirements, please refer to the [United Arab Emirates FAIRS Report](#), which provides a comprehensive guidance on the government regulations and compliance for food imports.

SECTION III. COMPETITION

The UAE retail food sector is highly competitive and saturated with a wide range of local, regional, and international food products. Its strategic location near major food-producing regions in the Middle East, Asia, and Europe facilitates rapid access to both affordable and high-quality consumer-oriented goods. In 2024, global exports of consumer-oriented products to the UAE reached \$16.2 billion, marking a significant growth of 13.67% compared to 2023⁷.

The main competitors to U.S. suppliers in the UAE are the EU, India, Brazil, Saudi Arabia and China all of whom enjoy strong trade relationships, geographical proximity (especially in the case of Asia), and often lower prices or preferential trade access. For U.S. exporters to expand, they will need to focus on high-quality differentiation, competitive pricing, and strategic partnerships to overcome both regulatory and market share hurdles.

Table 8: Global Consumer-Oriented Products Exports to the UAE (USD)

Country	2020	2021	2022	2023	2024
Total	9,580,920,380	11,169,915,711	13,251,062,319	14,285,417,593	16,230,380,041
EU 27 External Trade (Brexit)	1,989,599,955	2,201,303,120	2,713,951,892	2,980,146,420	3,169,758,608
India	993,946,795	1,265,015,762	1,498,678,638	1,657,066,612	1,996,909,625
Brazil	675,660,973	1,038,257,451	1,338,434,914	1,358,983,036	1,730,088,087
United States Consumption	732,064,168	891,309,885	1,035,597,592	1,008,605,874	1,178,960,940
Saudi Arabia	688,195,557	737,795,332	818,000,482	913,158,720	1,039,145,990
China	361,754,728	436,019,314	565,878,544	668,645,577	853,698,036
United Kingdom	301,425,975	394,308,624	503,966,575	485,678,386	543,096,784
Australia	325,312,453	383,661,856	488,387,884	434,272,458	533,127,056
New Zealand	420,818,711	479,146,320	469,343,839	452,434,955	491,042,503
South Africa	276,477,018	330,621,233	357,719,735	410,130,169	456,202,088

Source: Trade Data Monitor

⁷ Trade Data Monitor.

SECTION IV. BEST PRODUCT PROSPECTS

Table 9: Top 10 UAE Imports of Consumer Oriented Products and Market Share (USD)

Product Category	Gross Imports	First Supplier	Second Supplier	U.S. Ranking
Dairy Products	2,022,675,979	EU 27 External Trade (Brexit) (32%)	New Zealand (21%)	7 (3%)
Beef and Beef Products	1,599,536,526	Brazil (38%)	India (19%)	6 (4%)
Poultry Meat & Prods (excl. eggs)	1,297,809,242	Brazil (73%)	United States Consumption (6%)	2 (6%)
Fresh Fruits	1,194,604,977	South Africa (27%)	India (13%)	10 (3%)
Tree Nuts	1,079,252,477	United States Consumption (52%)	China (18%)	1 (52%)
Bakery Goods, Cereals, and Pasta	856,682,995	EU 27 External Trade (Brexit) (28%)	Saudi Arabia (21%)	5 (4%)
Soup and Other Food Preparations	832,155,390	EU 27 External Trade (Brexit) (30%)	United States Consumption (13%)	2 (13%)
Spices	695,311,663	India (47%)	Guatemala (19%)	16 (0.2%)
Chocolate and Cocoa Products	663,039,171	EU 27 External Trade (Brexit) (50%)	Turkey (6%)	7 (4%)
Fresh Vegetables	596,822,479	China (32%)	India (19%)	11 (1%)

Source: Trade Data Monitor

Table 10: Top Consumer-Oriented Products Imported from the United States (000 USD)

Country	2020	2021	2022	2023	2024
Total	734,474	895,842	1,036,868	999,742	1,173,219
Tree Nuts	307,508	385,839	489,287	425,840	553,866
Poultry Meat & Prods (excl. eggs)	36,094	48,386	54,416	62,017	80,741
Food Preparations	46,450	72,933	72,496	51,472	74,869
Beef & Beef Products	41,525	60,319	71,024	63,411	55,770
Dairy Products	48,246	54,767	70,958	57,186	49,995
Condiments & Sauces	40,540	43,908	43,219	47,283	49,520
Distilled Spirits	12,144	17,959	47,975	60,416	47,353
Confectionery	12,051	14,640	17,048	30,294	43,779
Processed Vegetables	32,252	34,891	30,944	37,067	37,516
Fresh Fruit	37,982	28,673	21,752	30,638	36,841

Source: USDA Global Agricultural Trade System

The UAE consumer-oriented product market presents a mix of opportunities and competitive challenges for U.S. exporters. Products already present in the market with strong sales potential include tree nuts, where the United States is the top supplier, commanding 52 percent of the import

market, primarily led by almonds, pistachios, and walnuts. The U.S. is also the second-largest supplier of poultry meat, holding a 6 percent share, showing potential for growth given Brazil's current dominance at 73 percent⁸. Soup and other food preparations, where the U.S. holds 13 percent market share, are a growing segment. While dairy 3 percent chocolate and cocoa 4 percent show strong potential due to rising demand and shifting consumer preferences.

Products not yet significantly present in the market but with good sales potential include fresh fruits and fresh vegetables, where U.S. suppliers rank 10th and 11th respectively, with less than 2 percent market share. These categories are currently dominated by South Africa, India, and China, but rising health awareness and demand for high-quality produce open the door for premium U.S. offerings.

Beef faces strong competition in the UAE, with Brazil and India holding 57% of the market. The U.S., ranked sixth, saw an 8.4 percent import decline in 2024 due to temporary halal certification issues, now resolved, allowing potential market share recovery despite price and preference challenges.

Pet food is a fast-growing category in the UAE, driven by rising pet ownership and increasing demand for premium products. Total imports of dog and cat food in the UAE rose significantly from \$80.7 million in 2023 to \$110.8 million in 2024. The European Union leads exports at \$51.1 million, followed by Thailand at \$31.8 million and the UK at \$6.7 million. The United States ranks fourth with \$4.8 million in 2024 and it has strong growth potential given the quality and innovation of American brands. Growth can be driven by adapting products to local preferences, meeting regulations, and strengthening distribution channels.

SECTION V. KEY CONTACTS AND FURTHER INFORMATION

Agricultural Affairs Office	Phone: +971 4 309 4000
Address: U.S. Consulate General	Fax: +971 4 354 7279
8 Al Seef St - Umm Hurair 1	Email: agdubai@usda.gov
Dubai, United Arab Emirates	
http://www.fas.usda.gov	

Host Country Government

See the [UAE Exporter Guide](#) for contact details.

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](#)

⁸ Trade Data Monitor.

Attachments:

No Attachments