

NAVIGATING DUBAI'S F&B SECTOR INSIGHTS & OPPORTUNITIES

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OUTLINE

Section I

Overview

Section II

Retail, Foodservice and Trade

Section III

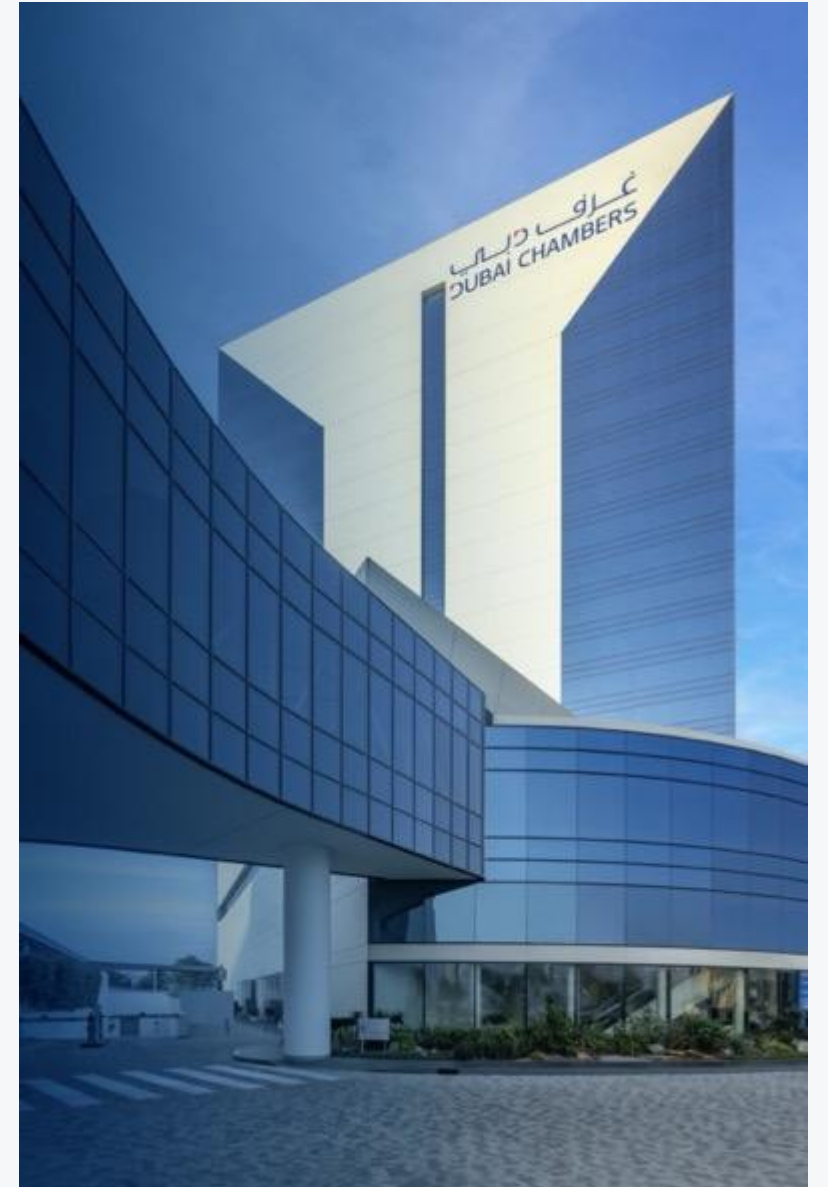
Manufacturing

Section IV

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Section V

Conclusions





OUTLINE

The UAE's Booming F&B Industry Driven by a Growing Population, Tourist Influx, and High Disposable Income



Population Growth

Total population of UAE was around **11 million** in 2025



Rising Income

GDP per capita in UAE was around **\$49,498** in 2025



Rising ArrivalsTourist

Dubai recorded almost 17.5 million tourists in 2025 (Jan-Oct), up 4.9% from the same period of last year



OUTLINE

Government, Innovation, and Investment as Catalysts for the UAE Food Sector



Government Policy

2025 UAE National Food Security Strategy 2051



Overseas Investment

UAE's FDI in F&B sector abroad: **USD 2.4 bn** (2021-2025)

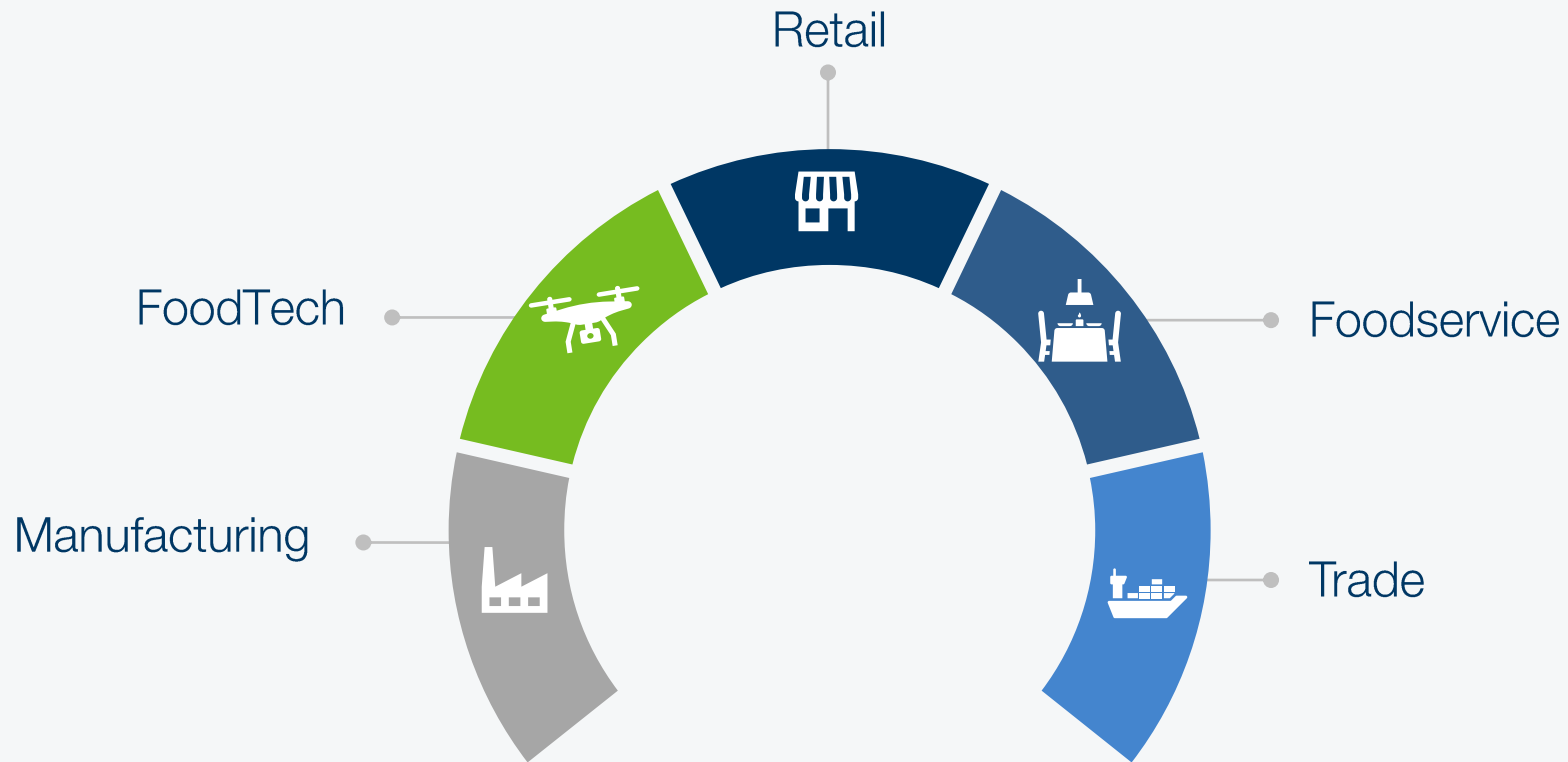


Agritech & Innovation

VC Investment in Agritech of UAE: **USD 546 mn** (2021-2025)



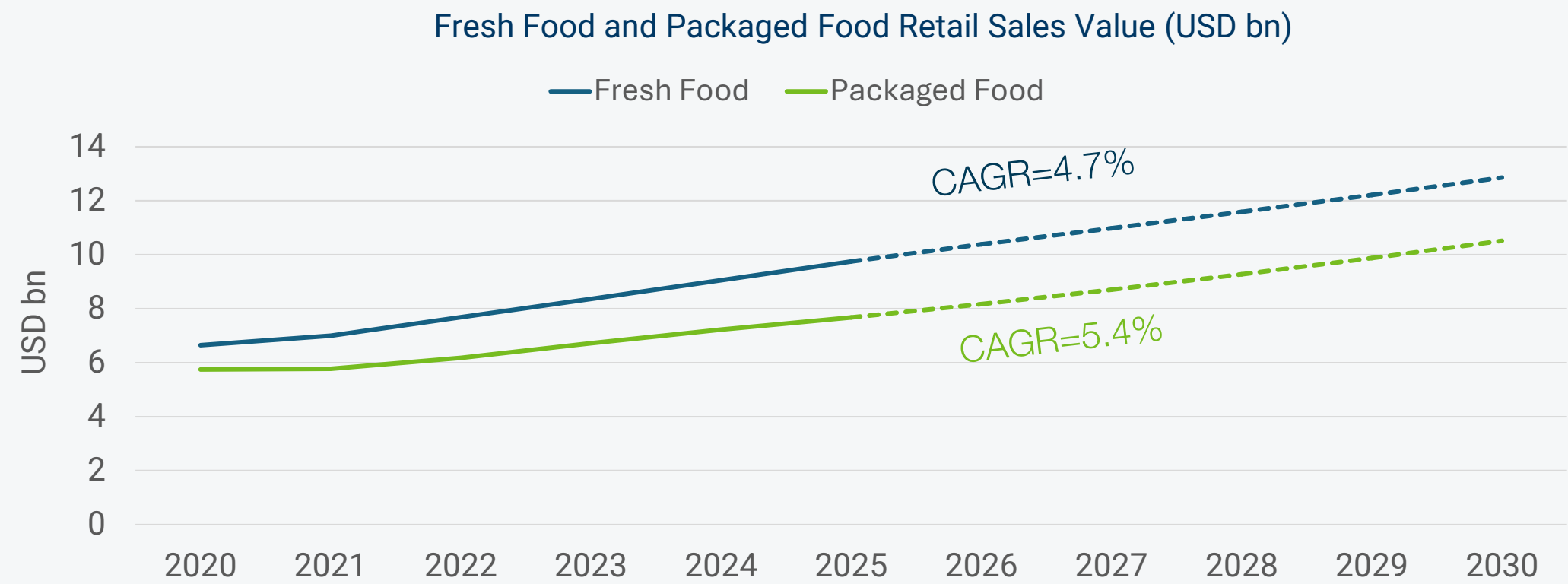
THE BIGGER PICTURE OF UAE F&B MARKET





UAE FOOD RETAIL MARKET

Packaged Food Sales Outpacing Fresh Food in the UAE

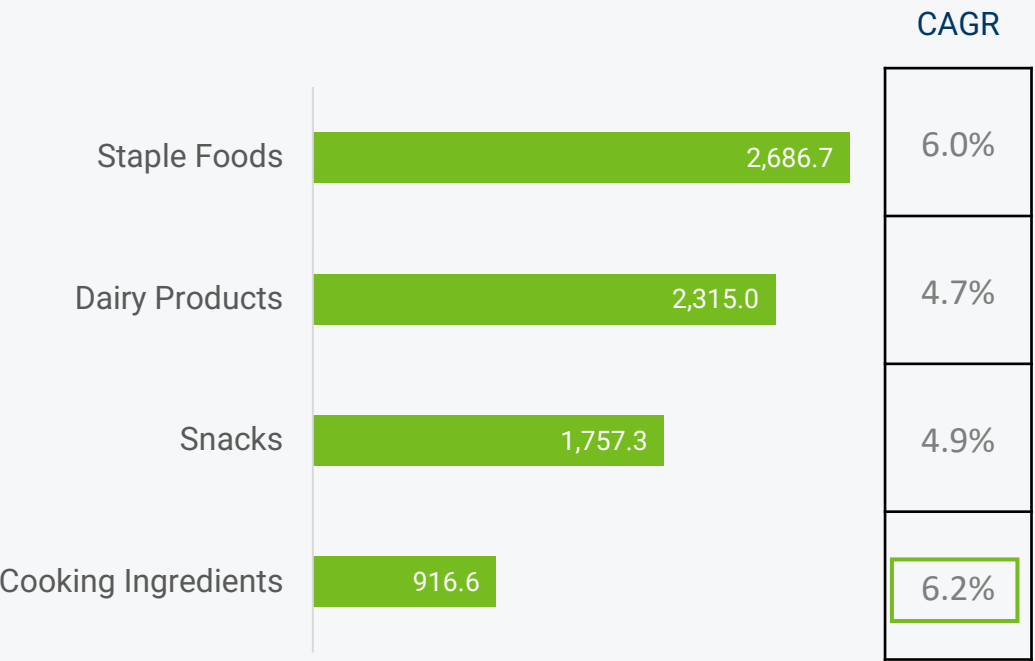




UAE FOOD RETAIL MARKET

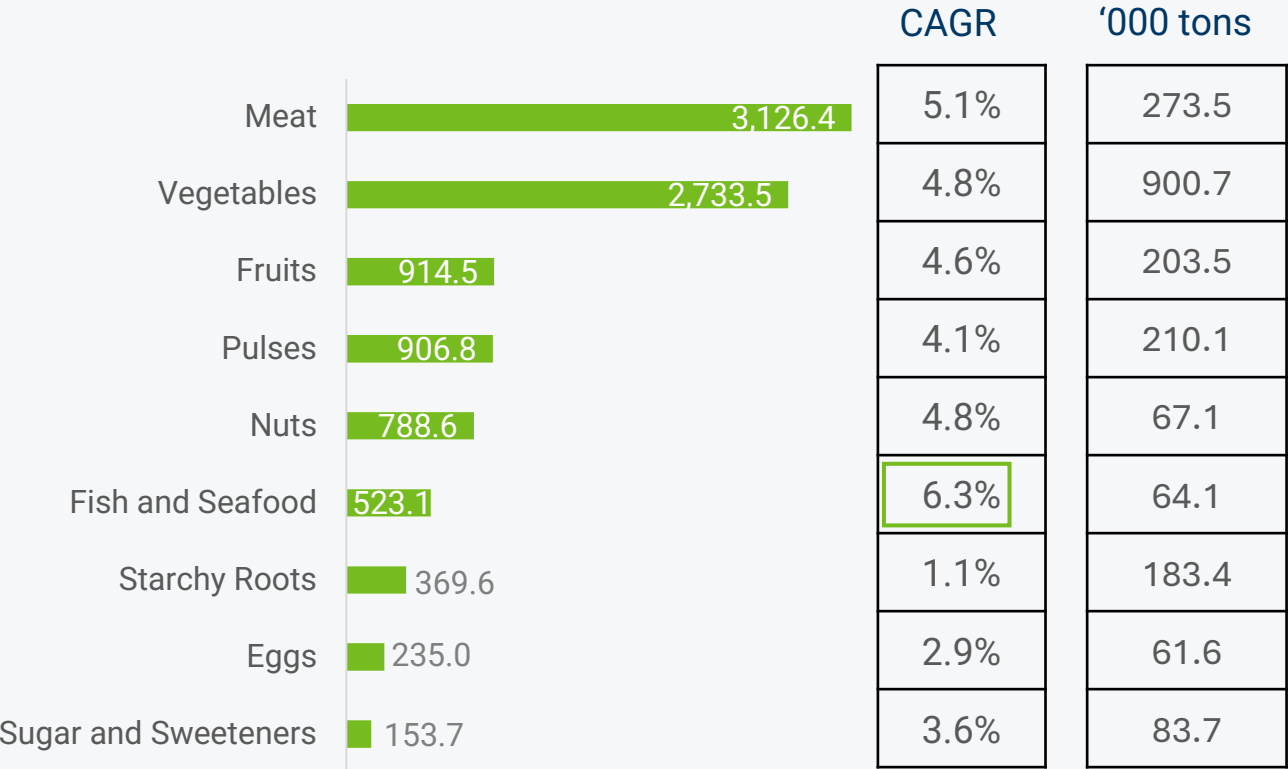
A Look at the UAE's Packaged and Fresh Food Sales by Categories

Packaged Food Retail Sales Value by Categories, USD mln (2025) and CAGR (2025-2030)



Source: Dubai Chambers based on Euromonitor

Fresh Food Retail Sales Value by Categories, USD mln (2025) and CAGR (2025-2030)

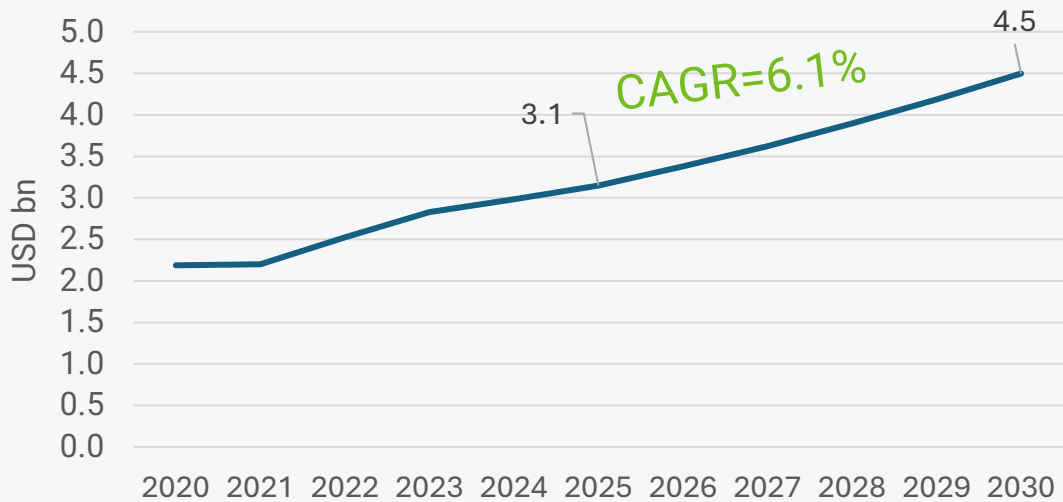




UAE BEVERAGE RETAIL MARKET

A Soft Drink Sales Trends: Carbonates Lead in Sales but RTD Coffee Emerges as Fastest Growing Category

Soft Drinks Retail Sales Value, USD bn and CAGR (2025-2030)



Soft Drinks Retail Sales Value by Categories, USD mln (2025) and CAGR (2025-2030)



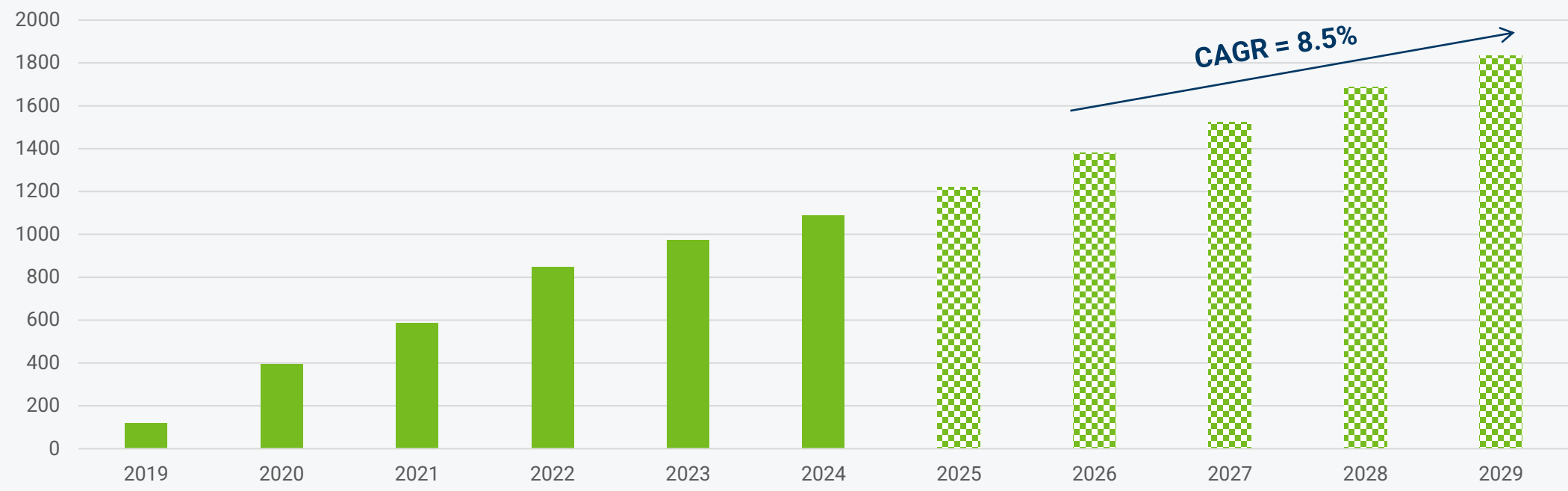
Source: Dubai Chambers based on Euromonitor



UAE FOOD RETAIL MARKET

E-commerce surge: UAE Consumers spent \$1.2 bn on Food E-Commerce Market in 2025

Food E-commerce in UAE (USD mln)

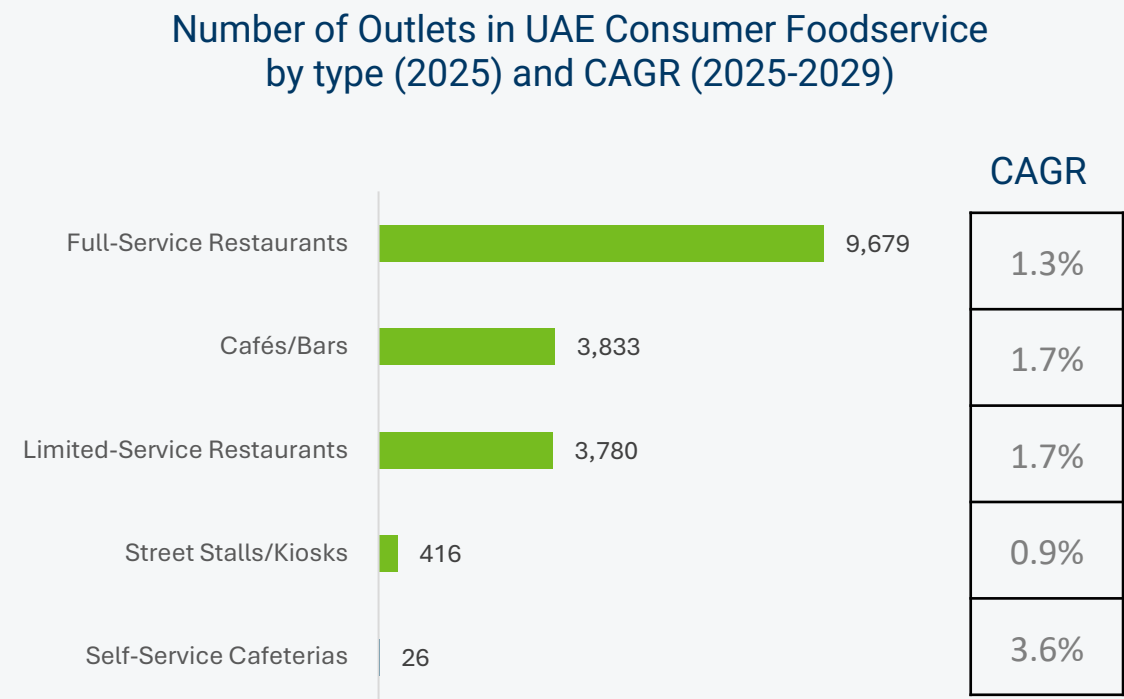
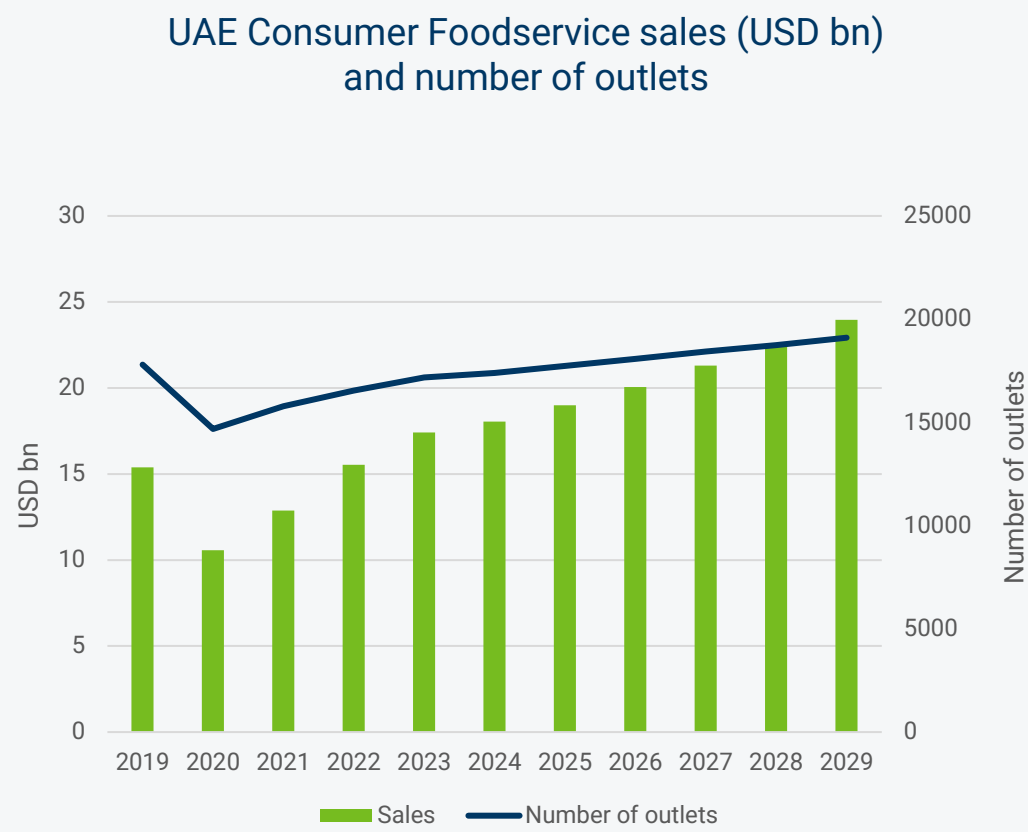


Source: Dubai Chambers based on Euromonitor



FOODSERVICE

Large Opportunities in the UAE's Diverse Foodservices Market

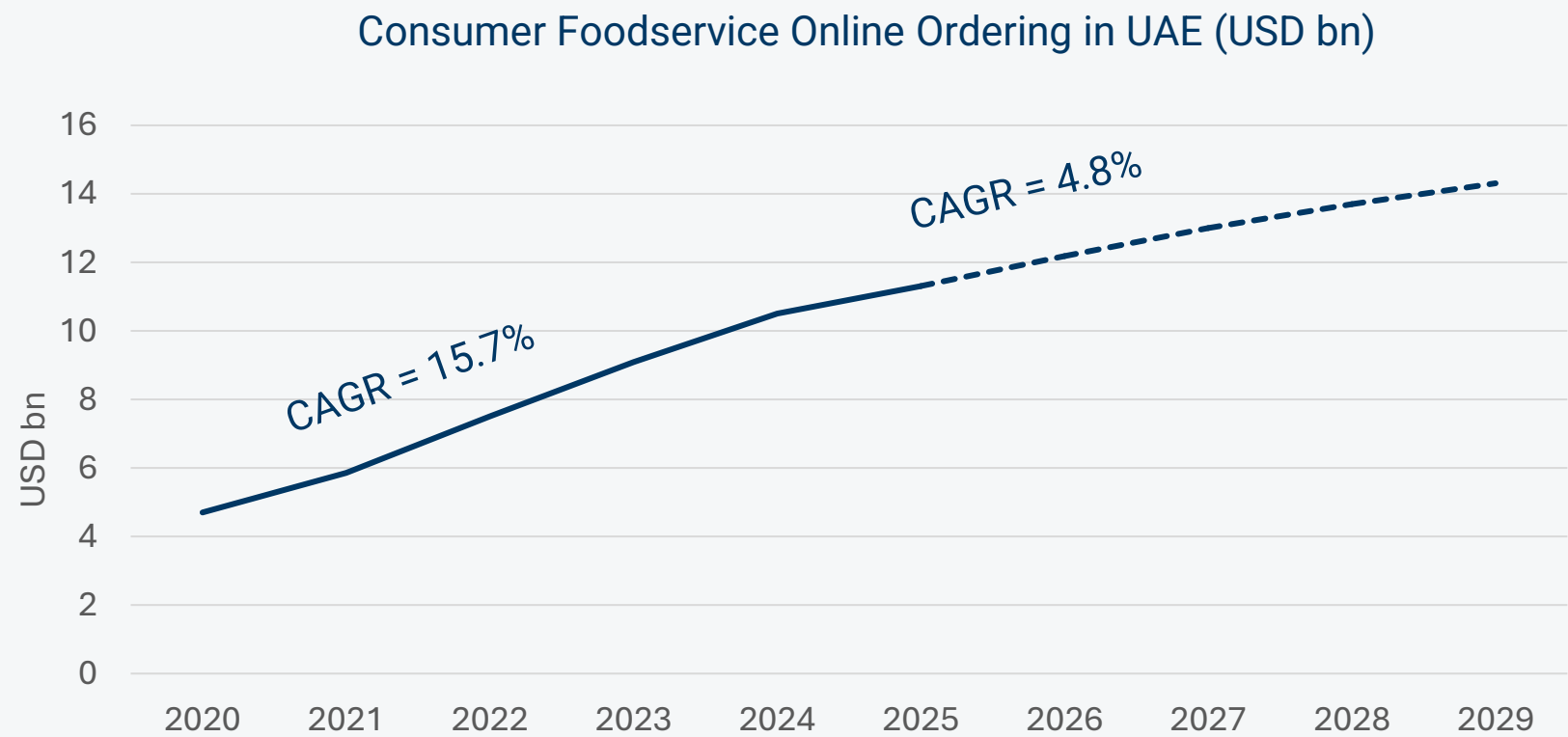


Source: Dubai Chambers based on Euromonitor



UAE FOODSERVICE

Online Food Ordering had double digit growth during 2020-2025

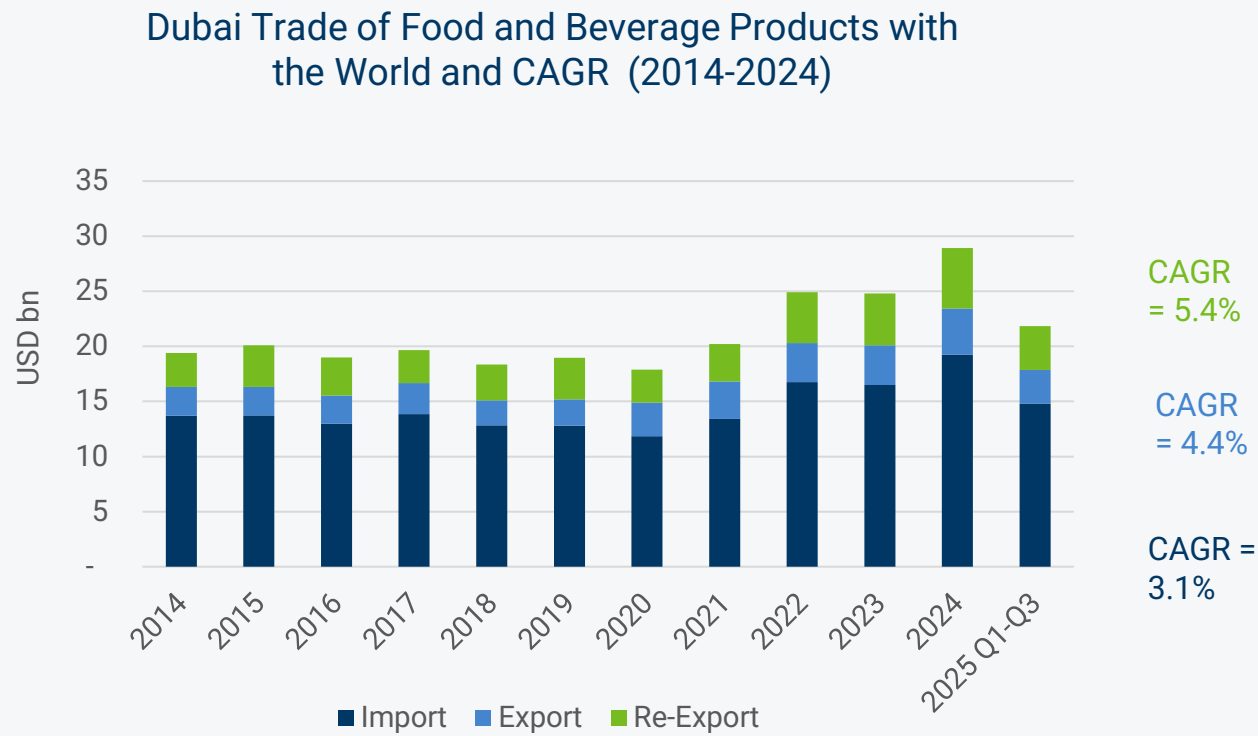


Source: Dubai Chambers based on Euromonitor



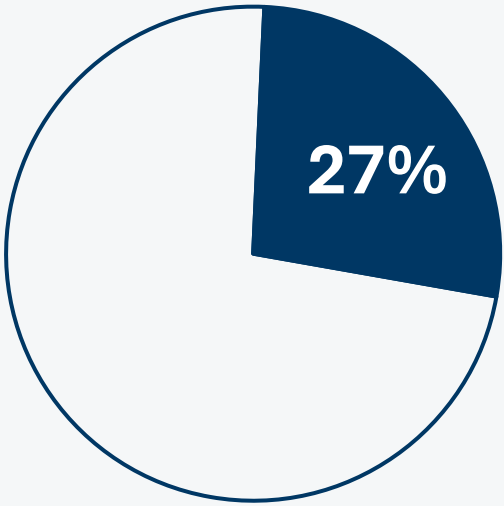
DUBAI TRADE OF FOOD AND BEVERAGE PRODUCTS

Dubai is a Trade Hub in F&B Products and Re-Exports Grows Faster



Note: Food and Beverage Trade includes all products from HS01 to HS23.

Share of Re-exports in Imports of F&B Products in Dubai, Q1-Q3 2025

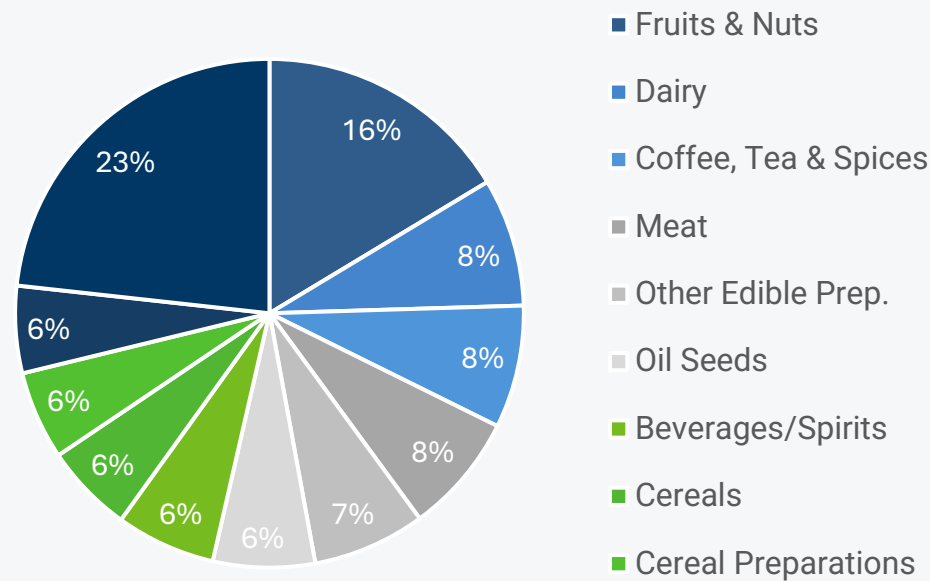




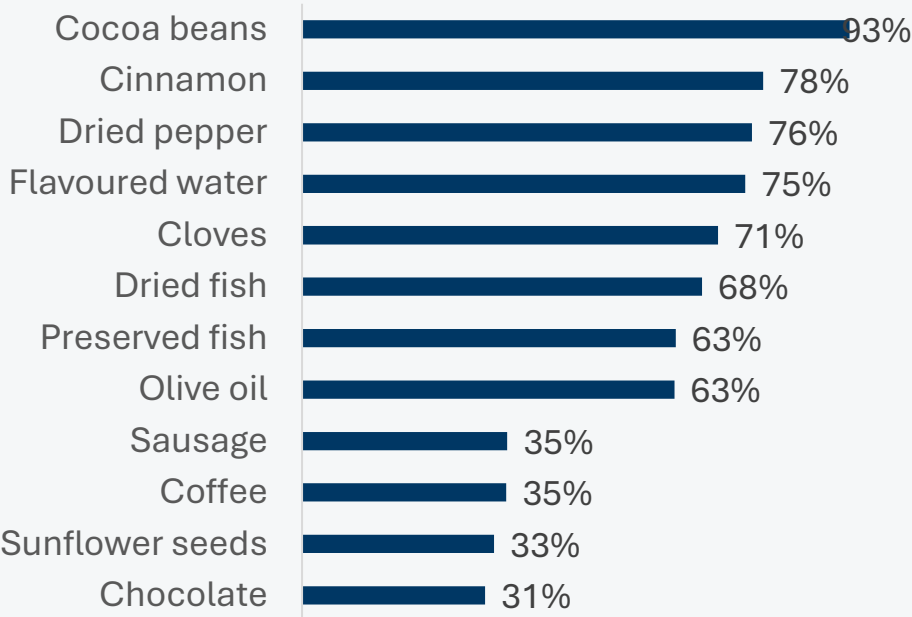
UAE TRADE OF FOOD AND BEVERAGE PRODUCTS

Dubai has Diversified Trade Strategy in F&B Products

Dubai’s Major Imported F&B Products from the World, % share, Q1-Q3 2025



Dubai is a trade hub for F&B products: Share of re-export in imports Q1-Q3 2025



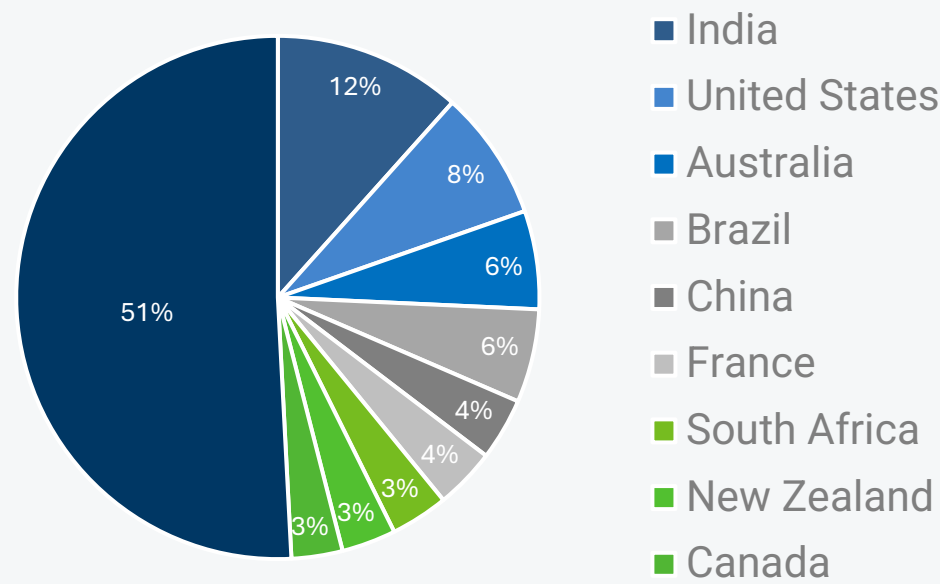
Note: Food and Beverage Trade includes all products from HS01 to HS23.



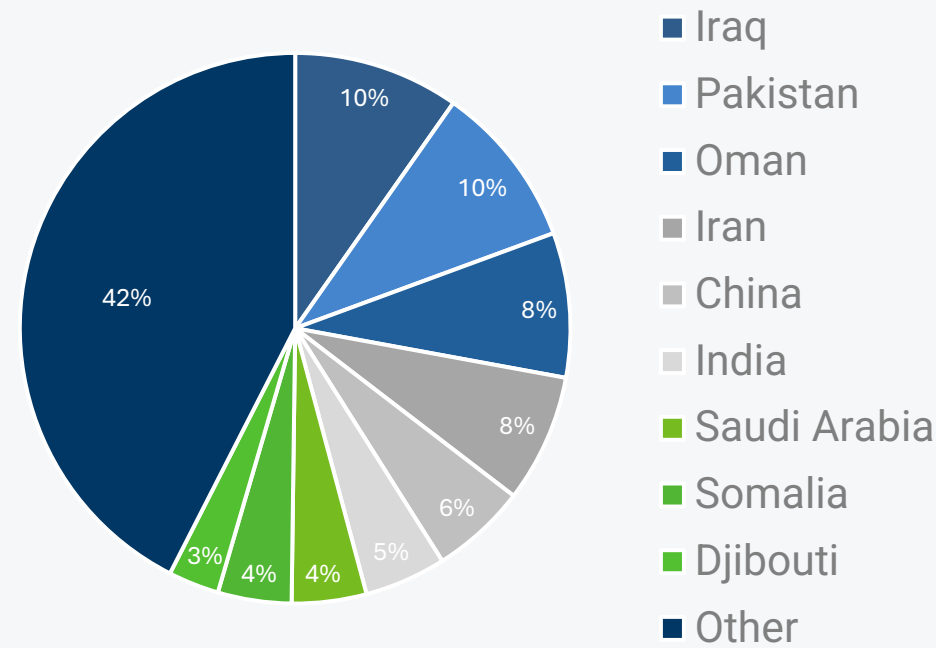
UAE TRADE OF FOOD AND BEVERAGE PRODUCTS

Dubai has Diversified Trade Strategy in F&B Products

Dubai’s Major Partners in Imports of F&B Products from the World, % share, Q1-Q3 2025



Dubai’s Major Partners in Total Exports of F&B Products to the World, % share, Q1-Q3 2025

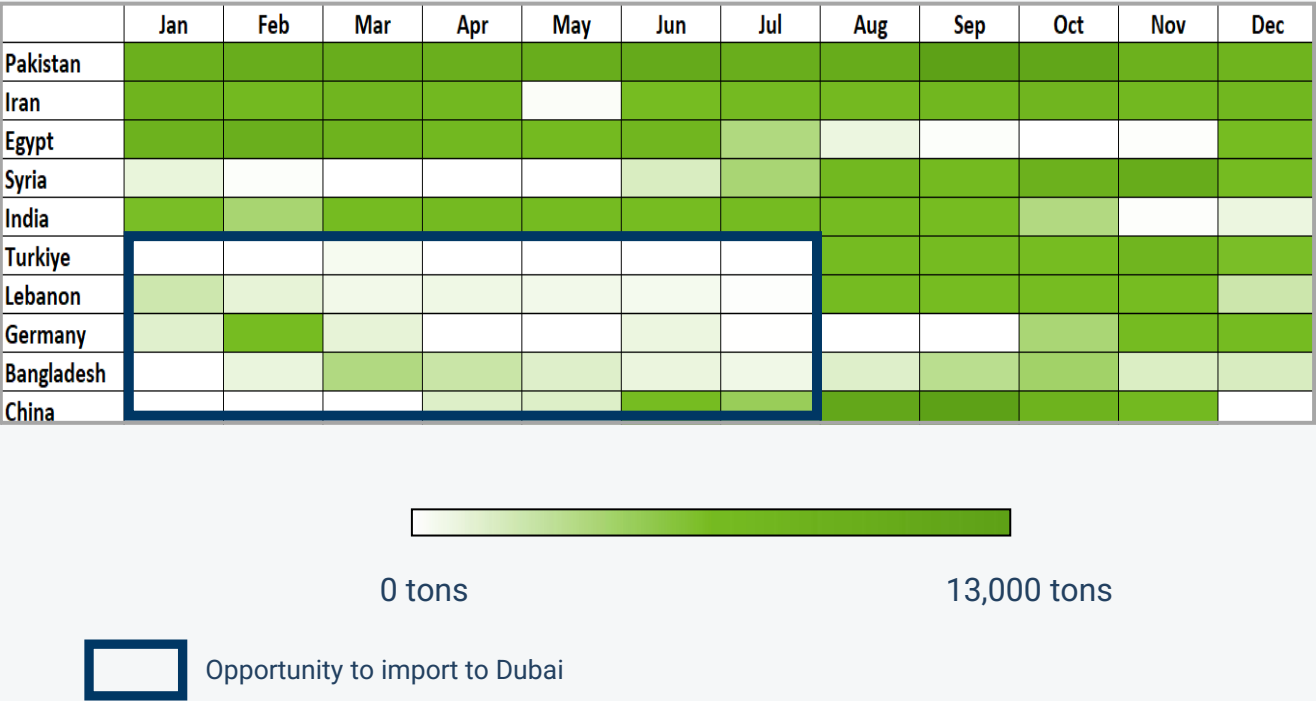


Note: Food and Beverage Trade includes all products from HS01 to HS23.

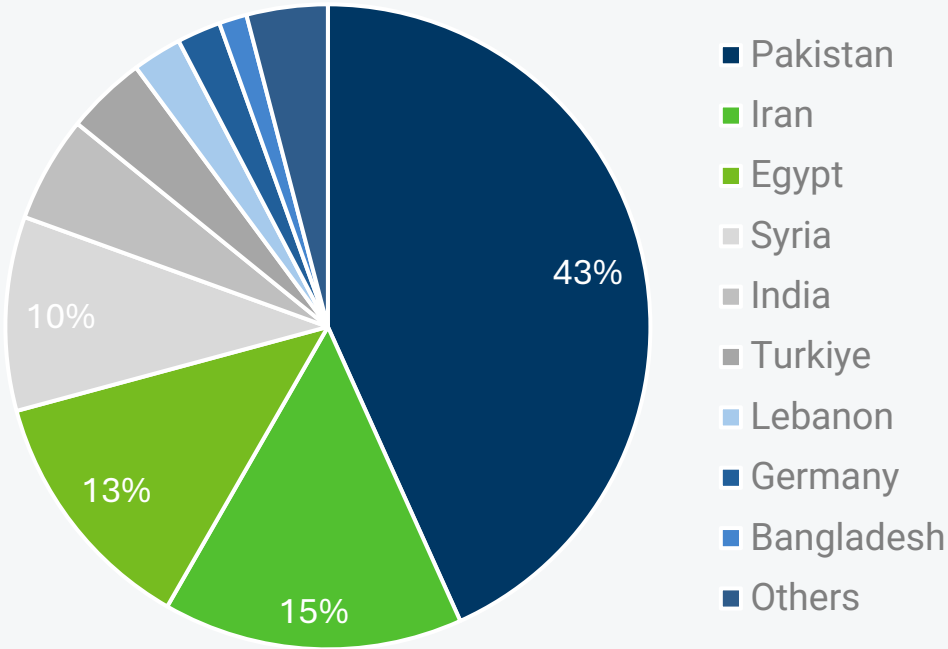


MARKET OPPORTUNITIES FOR TOP FOOD PRODUCTS

Dubai Fresh Potato (HS 070190) Total Imports - 323K Tons in 2024



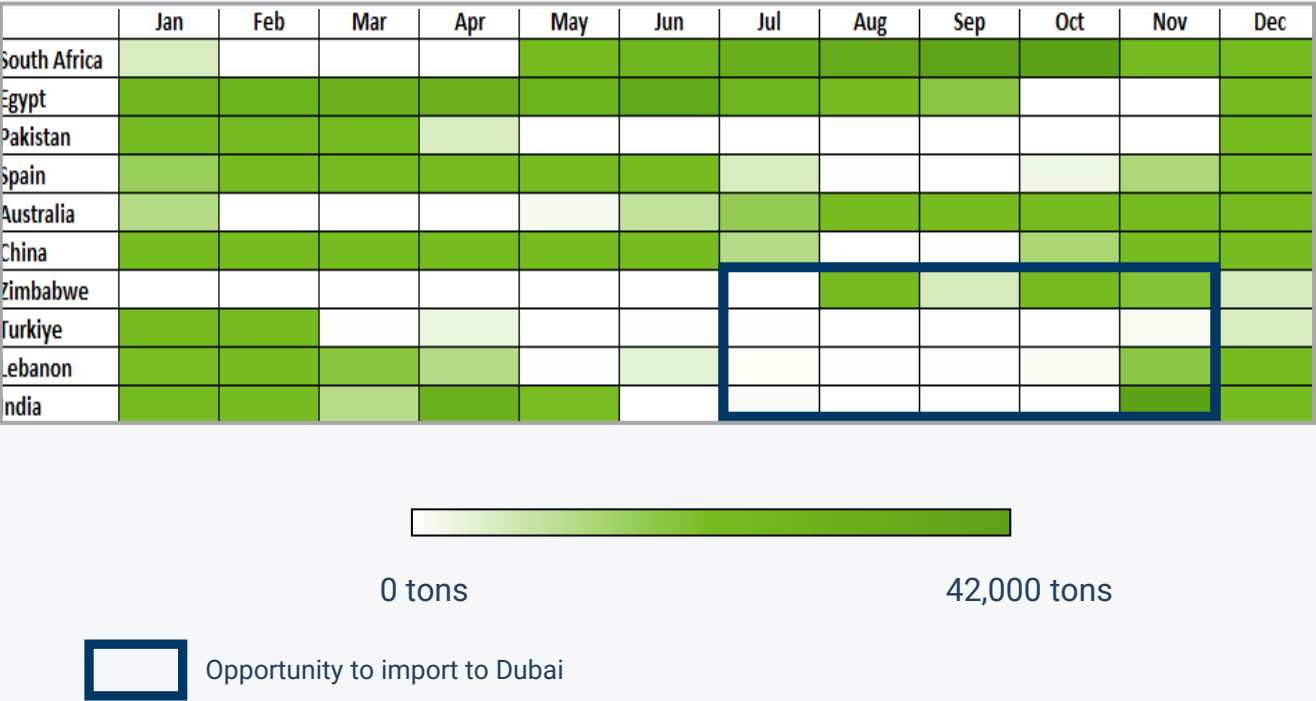
Share of Major Import Partners



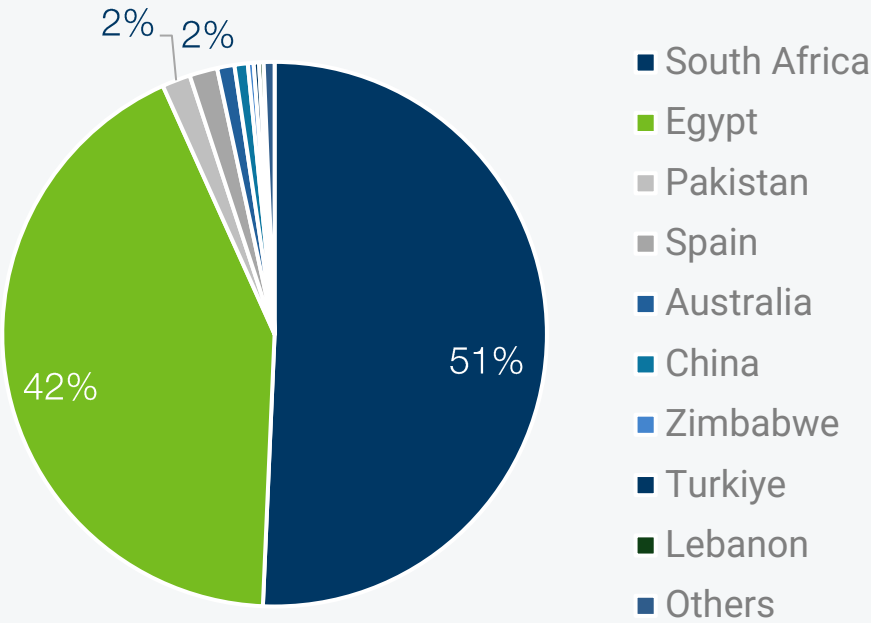


MARKET OPPORTUNITIES FOR TOP FOOD PRODUCTS

Dubai Fresh Orange (HS 080510) Total Imports - 244K Tons in 2024



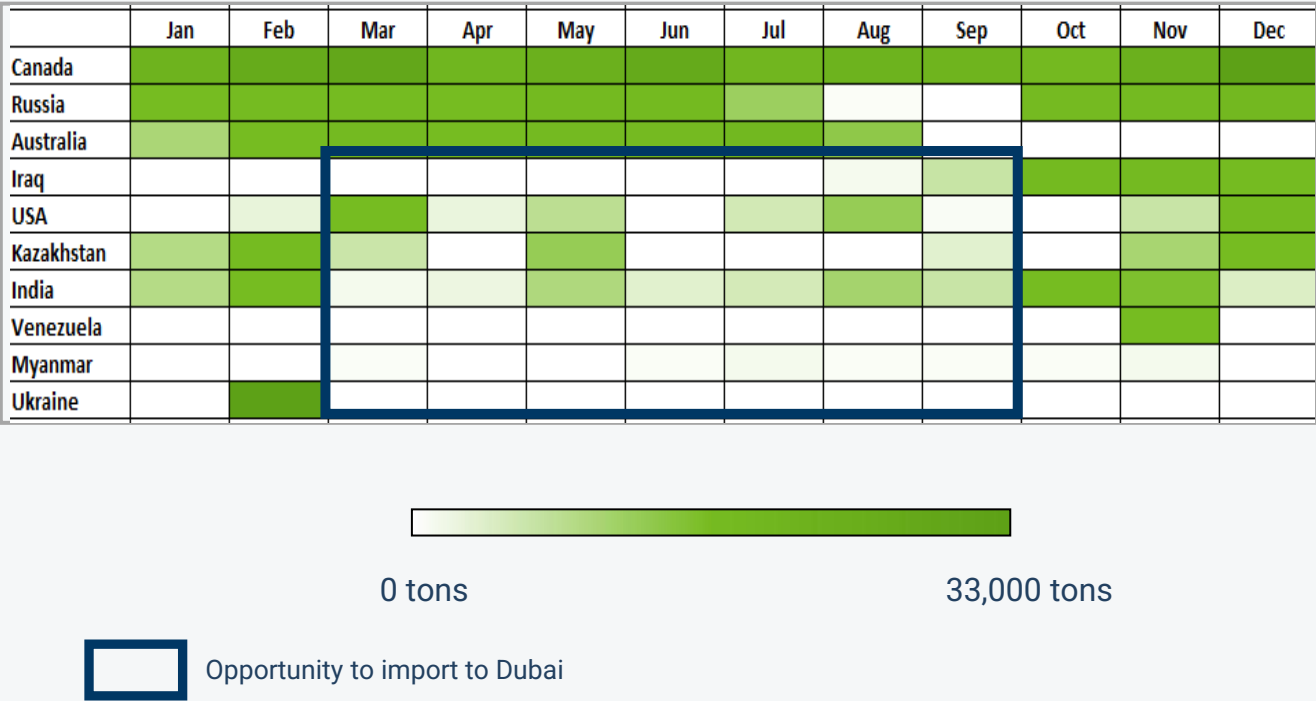
Share of Major Import Partners



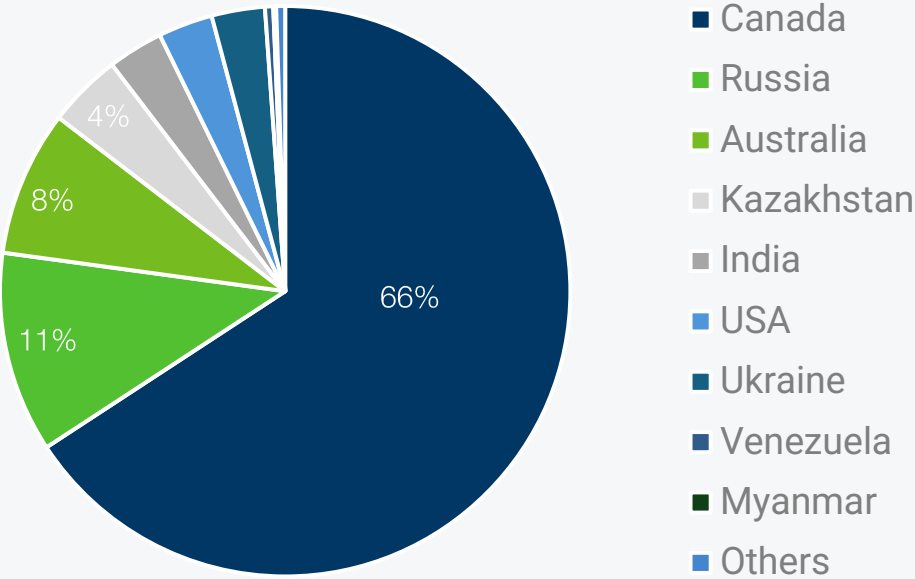


MARKET OPPORTUNITIES FOR TOP FOOD PRODUCTS

Dubai Lentil (HS 071340) Total Imports - 137K Tons in 2024



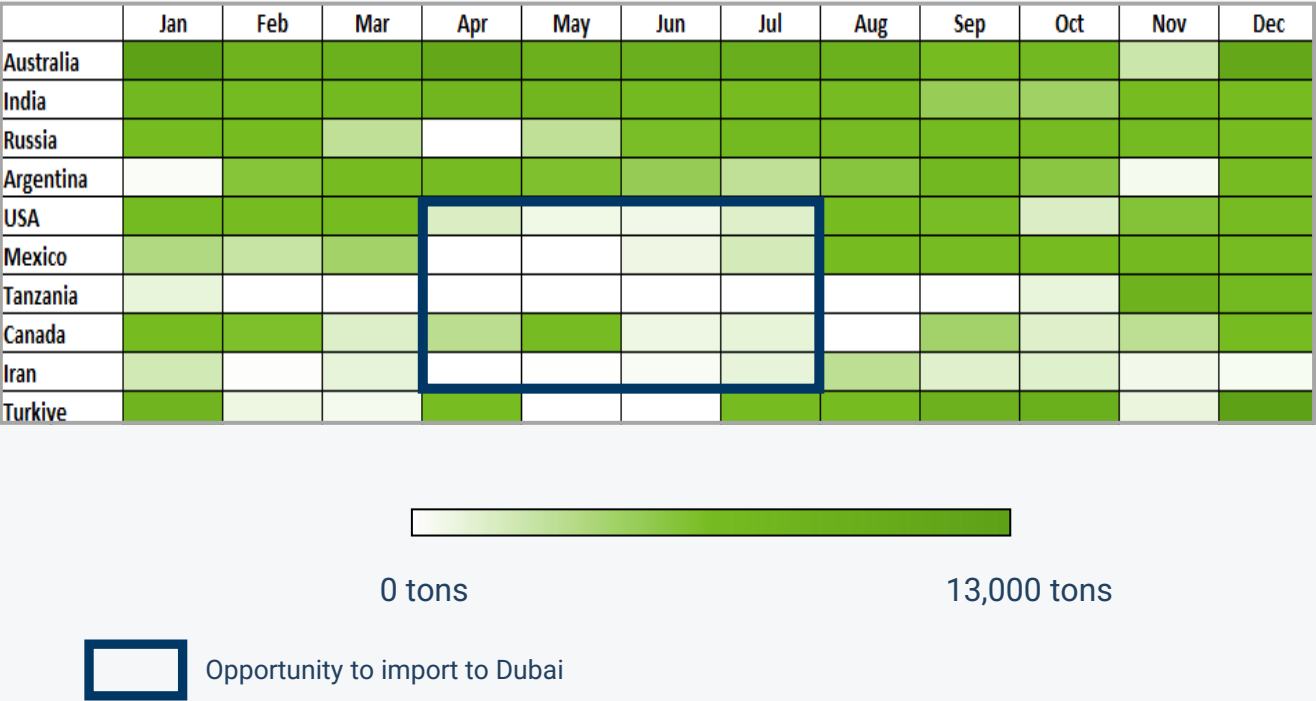
Share of Major Import Partners



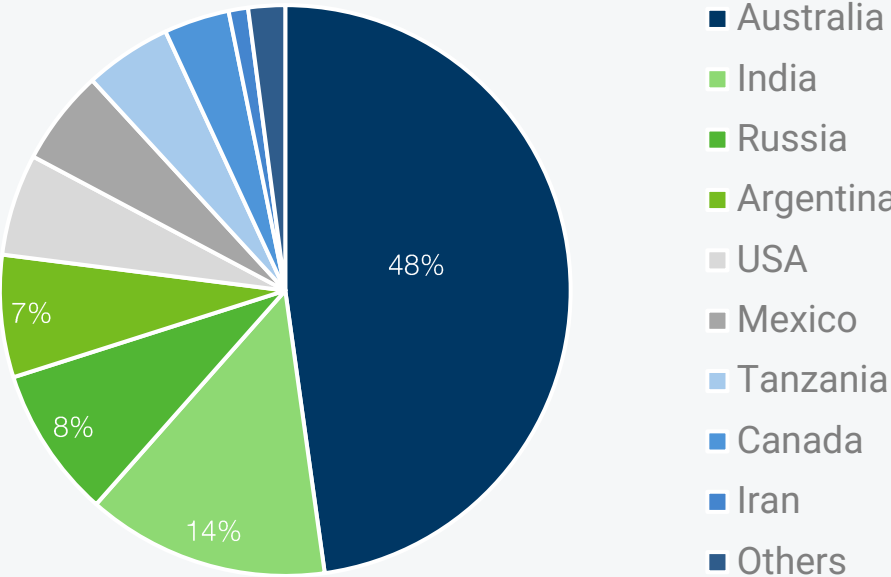


MARKET OPPORTUNITIES FOR TOP FOOD PRODUCTS

Dubai Chickpeas (HS 071320) Total Imports – 126K Tons in 2024



Share of Major Import Partners





UAE TRADE AGREEMENTS

CEPAs will Help to Expand F&B Trade

Trade Agreements



27 CEPA agreements

13 are currently active



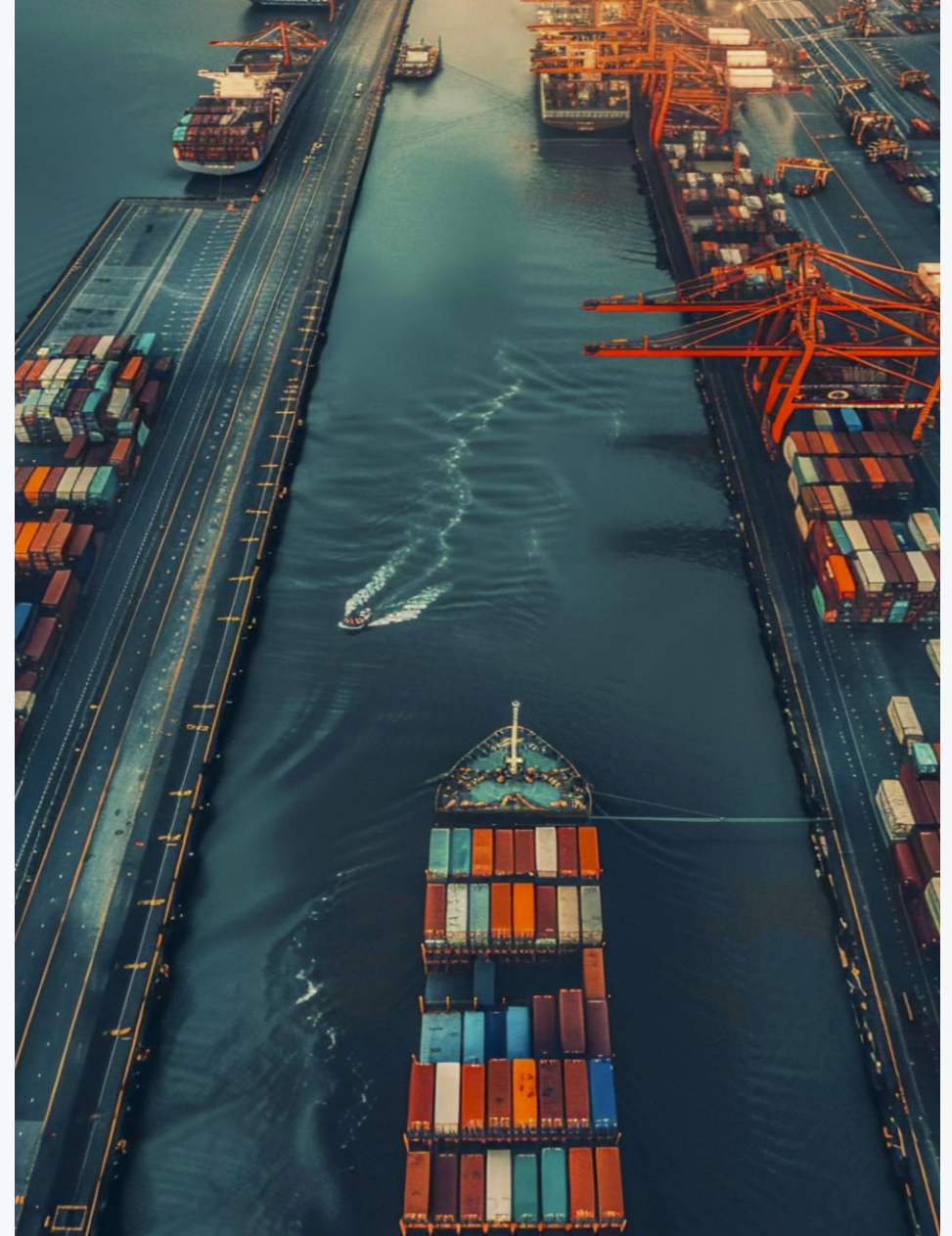
UAE Trade Agreements

GCC (4 countries)
GAFTA (15 countries)



Under GCC

EFTA (4 countries)
Singapore

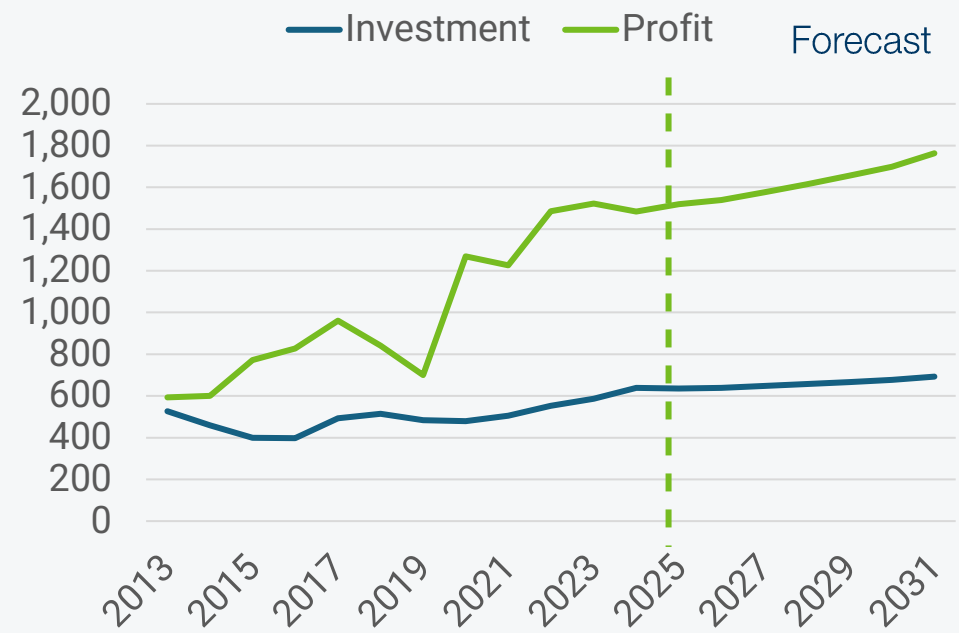




MANUFACTURING

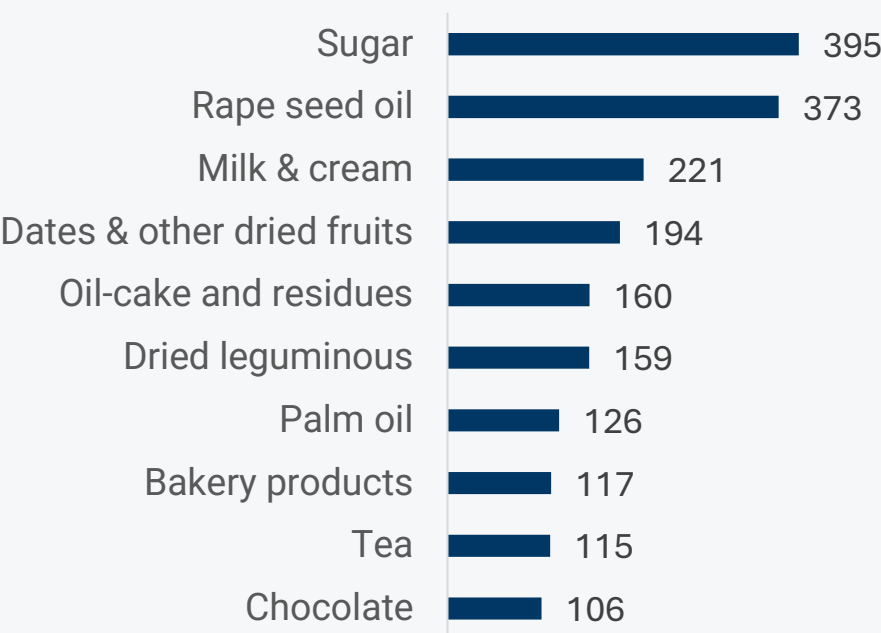
Food and Beverage Manufacturers are Predicted to have Growing Profits

Investment and gross operating profit of UAE Food manufacturing companies, USD mln



Source: Dubai Chambers based on Euromonitor

Dubai Export of Manufactured Food Products to the World (USD mln, Q1-Q3 2025)





FDI IN F&B SECTOR OF DUBAI

Since 2021, 78 Global Companies Invested in Dubai's F&B Sector

Statistics on greenfield investment in Dubai's F&B Sector
(2021-2025, USD mln)



\$ 576 mln
Total Greenfield
Investment



3,752
Job
Created

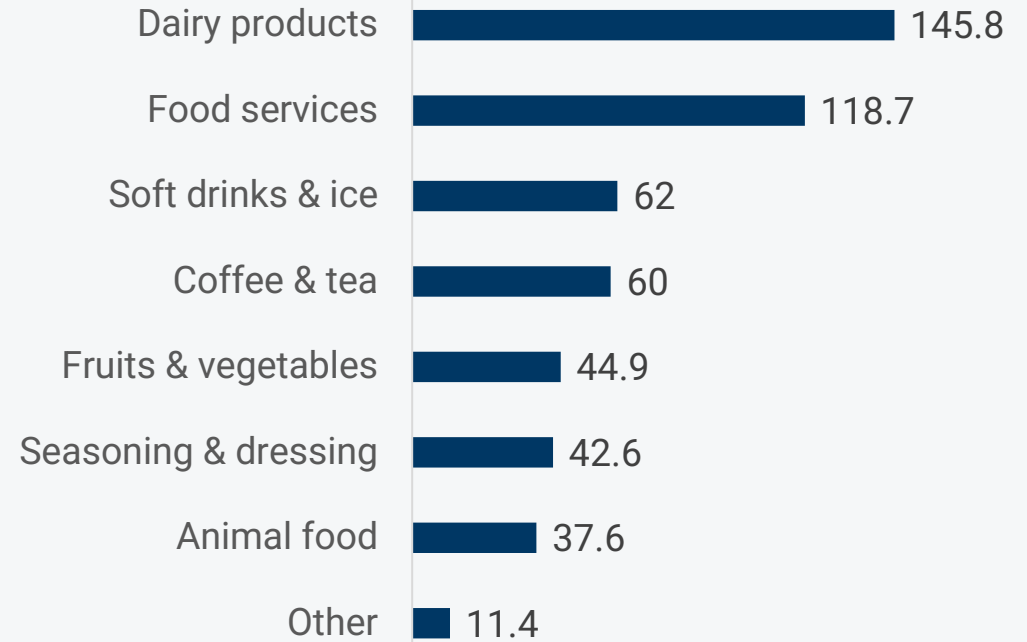


82
Total Number of
Countries Invested



78
Total Number of
Global Companies

Total Greenfield investment in Dubai's top F&B subsectors
(2021-2025, USD mln)

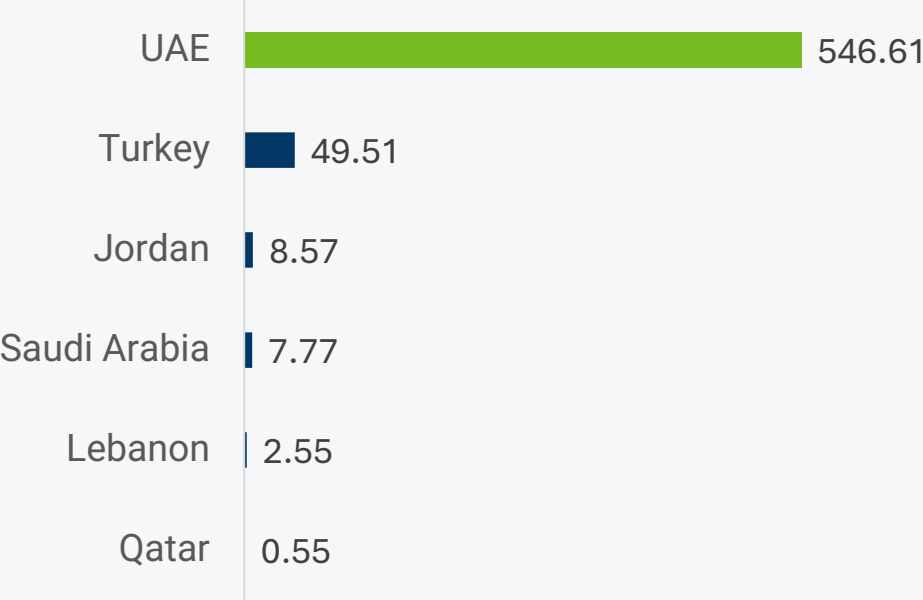




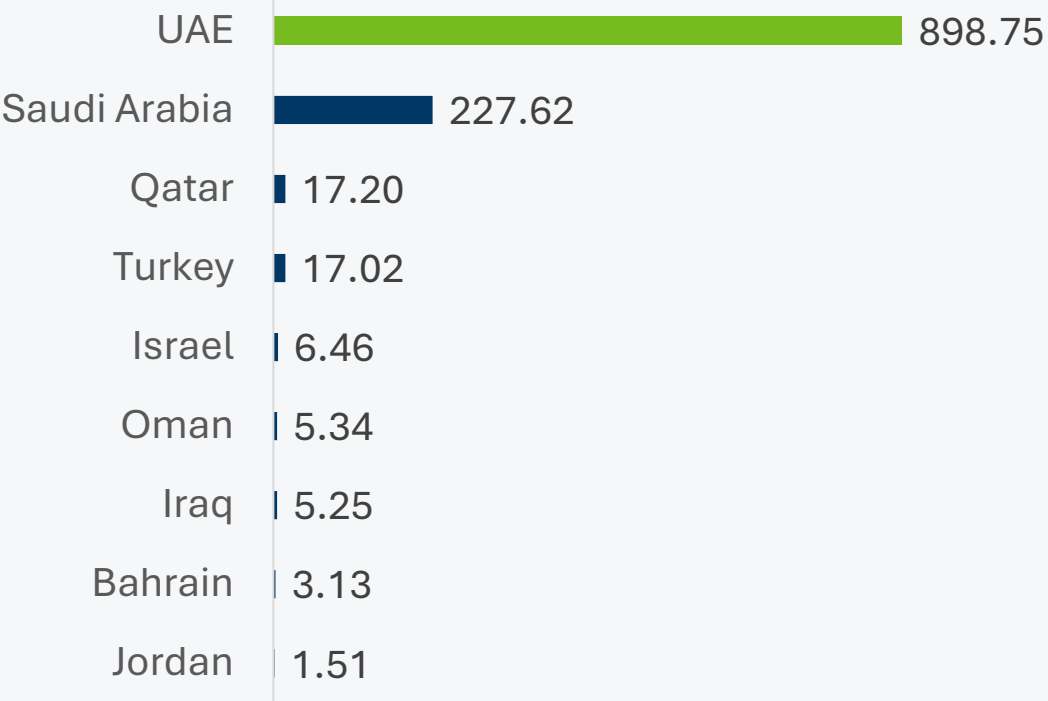
FOODTECH

UAE is the Most Attractive Place for VC Investment in RestaurantTech in MENA

VC Investment in AgriTech: UAE vs. Middle East
(2021-2025, USD m)



VC Investment in RestaurantTech: UAE vs. Middle East
(2021-2025, USD m)



Source: Dubai Chambers based on Pitchbook



CONCLUSION



The rising population and the significant influx of tourists to Dubai annually create a robust demand for high-quality F&B products and services



In the UAE, there is a significant upward trend in the retail sector for staple food, meats, and drinks, both in terms of their market worth and the quantities sold



Dubai's substantial expatriate community contributes to a wide array of culinary options and fosters a variety of prospects within the F&B sector



Dubai maintains its role as a regional trade hub for F&B products and creates prospects for traders in this sector.



There is a rising demand among UAE consumers for locally produced goods, presenting local food manufacturers with the chance to meet this expanding market interest



Dubai Chambers International Offices can help F&B companies to grow at regional and international levels

Scan to Receive the Presentation



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