Country Profile – United Arab Emirates

Food Processing Sector

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1.Preface

The food processing sector serves as a critical engine of economic growth, food security, and global trade, bridging agriculture with industry and innovation. As countries seek to build sustainable and resilient food systems, international cooperation plays a vital role in unlocking shared opportunities across borders.

This Country Profile on the United Arab Emirates (UAE) has been prepared as part of the knowledge and engagement initiative under *World Food India 2025 (WFI 2025)*, a flagship platform of the Ministry of Food Processing Industries (MoFPI), Government of India. UAE is the "Focus Country in WFI 2025. The document provides a comprehensive overview of the UAE's evolving food processing ecosystem - its market size, trends, policies, trade dynamics, and investment potential - with a focus on identifying synergies between India and the UAE.

As one of the world's leading export hubs and a regional pioneer in agri-tech innovation and food logistics, the UAE offers significant prospects for collaboration across the food value chain. This profile aims to serve as a strategic reference for investors, policymakers, researchers, and business leaders seeking to explore avenues for bilateral partnerships in food processing, technology, trade, and infrastructure development.

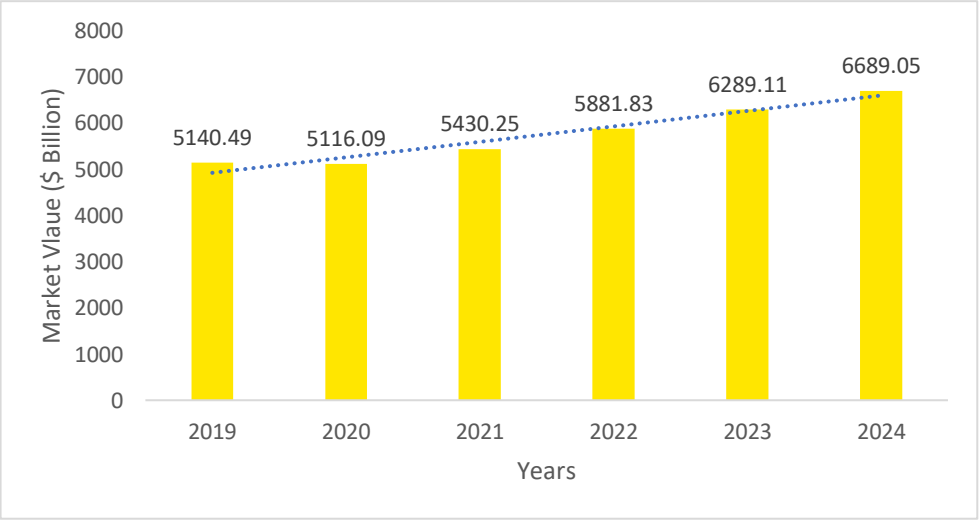
World Food India 2025 reaffirms India's commitment to fostering global alliances, promoting inclusive innovation, and catalysing investments that contribute to a more sustainable and equitable global food system. We hope this Country Profile enables meaningful engagement and inspires impactful collaborations between India and the United Arab Emirates in the years to come.

.Overview of the Global Food Processing Sector

The food processing sector plays a vital role in transforming raw agricultural products into processed food items that are safe, nutritious, and suitable for consumption. It encompasses a broad range of activities, including harvesting, sorting, cleaning, packaging, preserving, and distributing food products. A variety of techniques and technologies are employed to enhance the quality, safety, and shelf life of food. Common processes include cutting, grinding, cooking, pasteurization, canning, freezing, and dehydration. These methods often involve the use of specialized machinery, equipment, additives, and other ingredients to modify the properties of raw materials.

This sector is instrumental in addressing the global demand for safe, convenient, and diverse food options. It enables the extended availability of seasonal produce and supports the development of an extensive range of food products, including fruits, vegetables, grains, dairy, meat, poultry, seafood, bakery items, beverages, and ready-to-eat meals. Food processing companies operate at varying scales, from small local enterprises to large multinational corporations. All operators must comply with stringent quality control and food safety regulations to meet both consumer expectations and regulatory standards.
Overall, the food processing industry significantly contributes to economic growth, employment generation, and food security by adding value to agricultural output and ensuring large-scale availability of processed food.
As of 2024, the global food and beverages market reached an impressive valuation of USD 6,689.0 billion. On a per capita basis, this translated to a consumption value of USD 839.6. The sector accounted for a substantial 6.12% share of the global GDP, underscoring its economic importance.[1]
Within the market, the meat, poultry, and seafood segment held the largest share at 23.2%, followed by the bakery and confectionery segment at 13.6%, and the dairy sector at 12.3%, reflecting the diverse consumption patterns and robust demand across categories.[2]

Figure 1: Global Food & Beverages Market, Historic Market Size, 2019-2024, USD Billion



[1]Food and Beverages Global Market Briefing 2025 – The Business Research Company, March 2025 - https://globalmarketmodel.com/DocViewer.aspx?id=165159
[2]Ibid

- The global food and beverages market grew from USD 5140.49 Bn in 2019 to USD 6689.05 Bn in 2024[3]
- The market grew at a compound annual growth rate (CAGR) of 5.41% [4]

Emerging Trends[5]

The food and beverages market are being influenced by several significant trends, which are as follows:

- Functional drinks for hydration & nutritional benefits
- Rise in micro distilled/artisan spirits
- Rise of alcohol ecommerce market
- High pressure pasteurization of fruits & vegetables
- Increasing demand for clean label products
- Individual quick freezing (IQF) technology
- Robotics and automation in meat processing
- Premiumization of pet foods
- Use Of advanced cigarette filter technologies

[3] Ibid
[4] Ibid
[5]Ibid
[6] Ibid
[7] Ibid
[8]Ibid

2.United Arab Emirates – Country Overview

United Arab Emirates is a country in West Asia, in the Middle East, at the eastern end of the Arabian Peninsula. It is a federal semi-constitutional monarchy made up of seven emirates, with Abu Dhabi serving as its capital. The following table highlights key facts about UAE.

Table 1. UAE - Key Facts	
Capital	Abu Dhabi
Area	98,648 sq km[6]
Population (2024)	10,876,981[7]
Currency	United Arab Emirates Dirham
Languages	Arabic
Life Expectancy (2023)	83 years[8]
President	Mohammed bin Zayed Al Nahyan
Prime Minister	Mohammed bin Rashid Al Maktoum
Global Population Rank[9]	86th in world
Urban – Rural Population (2023)[10]	Urban: 88%; Rural: 12%

UAE Economy Overview

The economy of the United Arab Emirates (UAE) is characterized by its significant reliance on oil exports, positioning it among the world's largest oil producers and exporters. Historically, oil revenues have constituted a major share of the country's GDP and government income.

As the UAE charts its economic vision for the next decade through the ambitious "We the UAE 2031" plan, the nation aims to achieve transformative milestones on the global stage. This strategic vision reflects the UAE's comprehensive commitment to advancement across social, economic, investment, and developmental dimensions, reinforcing its position as one of the world's leading countries.

Key facts about the UAE economy are outlined below:

Table 2. UAE - Economy Key Facts	
Gross Domestic Product per capita (current USD) (as of 2024)[11]	USD 49,377.6
GDP (current USD) (2024)[12]	USD 537,078.83 million
Total Final Consumption Expenditure (% of GDP) (2023)	58 %[13]
CPI Inflation	1.7 % (2024)[14]
Economic Growth (2024)	3.8%[15]

[6] https://data.worldbank.org/indicator/AG.SRF.TOTL.K2?locations=AE
[7] https://data.worldbank.org/indicator/SP.POP.TOTL?locations=AE
[8] https://data.worldbank.org/indicator/SP.DYN.LE00.IN?locations=AE
[9] https://www.worldometers.info/world-population/united-arab-emirates-population/
[10] https://data.worldbank.org/indicator/SP.URB.TOTL.IN.ZS?locations=AE
[11] Ibid
[12] Ibid
[13] https://data.worldbank.org/indicator/NE.CON.TOTL.ZS?locations=AE
[14] https://data.worldbank.org/indicator/FP.CPI.TOTL.ZG?locations=AE
[15] https://data.worldbank.org/indicator/NY.GDP.MKTP.KD.ZG?locations=AE&utm_

UAE: Agriculture Market Overview[16]

The agricultural sector in the United Arab Emirates (UAE) has undergone a remarkable transformation, propelled by innovation and strong government support aimed at overcoming the challenges posed by the region's arid climate. Advanced technologies such as precision agriculture, vertical farming, and climate-controlled greenhouses are at the forefront of this evolution, enhancing productivity and promoting sustainability. These initiatives reflect a strategic shift towards self-sufficiency and have fuelled rising demand for modern agricultural equipment—from tractors used in land development to planting and harvesting machinery critical for crop management and processing. As a result, the UAE's agriculture sector is expanding across various equipment segments, tailored to diverse farming needs.

Agriculture in the UAE is highly technology-driven, focusing primarily on the cultivation of vegetables and fruits. Key crops include dates, tomatoes, cabbage, eggplant, cauliflower, squash, bougainvillea, tropical hibiscus, mangoes, and citrus fruits. The UAE agriculture market is segmented by crop type, including food crops/cereals, fruits, and vegetables.

Dates are a primary crop in the UAE. According to the Food and Agriculture Organization (FAO), date production led agricultural output, reaching over 405,146 metric tons in 2023. Despite adverse soil and climatic conditions, crop production continues to rise due to various government initiatives such as free cultivation support, a 50% reduction in crop protection and fertilizer costs, and subsidized veterinary services. Notably, vegetables such as tomatoes, cucumbers, lettuce, and strawberries have been successfully grown using soilless farming techniques.

Precision agriculture incorporating smart irrigation systems and climate-controlled facilities has optimized resource utilization and improved yields. Recognizing the importance of food security, the UAE launched the National Food Security Strategy, targeting a 30–40% increase in domestic production over a decade. Sustainability is central to this strategy, aligning with the United Nations Sustainable Development Goals (SDGs) and enhancing farm efficiency.

In 2023, the Ministry of Climate Change and Environment (MOCCAE) introduced the National Farms Sustainability Initiative to further bolster domestic production. This program secures purchase agreements, raises farmers' incomes, and aims to enhance the UAE's self-sufficiency without disrupting food trade. In its first phase, the initiative sought to increase government procurement to 50% of domestic agricultural output in 2023, with targets of 70% by 2025 and 100% by 2030.

UAE Agriculture Market Analysis

The UAE agriculture market is estimated at USD 3.45 billion in 2025 and projected to reach USD 4.26 billion by 2030, growing at a CAGR of 4.3% during the forecast period (2025–2030).

The UAE has one of the highest per capita food consumption rates in the Gulf Cooperation Council (GCC), reaching 10.4 million metric tons in total consumption, with 0.93 metric tons per capita in 2023. This high consumption underscores the UAE's potential as a promising

[16] https://www.mordorintelligence.com/industry-reports/agriculture-in-the-united-arab-emirates-industry#:~:text=According%20to%20the%20Food%20and,of%20vegetables%20produced%20in%202023.

market for agricultural development. Despite limited arable land and water scarcity, the country has built a resilient agricultural ecosystem through substantial investments in advanced and sustainable farming practices.

According to the FAO, cereal production in the UAE stood at 23,100 metric tons in 2023. While this remains modest, the UAE imported cereals worth USD 1.61 billion in 2023, up from USD 1.19 billion in 2021, reflecting increased consumption and declining strategic grain reserves. Rice dominates these imports, especially milled rice, with other varieties like paddy, brown, and broken rice also contributing.

In response to global supply chain disruptions triggered by the COVID-19 pandemic, the UAE launched Agriota, an agricultural trading platform developed in partnership with India's CropData Technology and the Dubai Multi Commodities Centre (DMCC). Agriota connects Indian farmers directly with UAE-based food companies, facilitating trade in cereals, pulses, oilseeds, fruits, vegetables, spices, and condiments. This initiative strengthens the UAE's food security by ensuring reliable agricultural supply chains.

Additionally, the recovery of Dubai's tourism sector contributing 10–15% to the UAE's GDPhas spurred further demand for food products. Increased consumption of baked goods, processed foods, and restaurant offerings has driven cereal imports and stimulated domestic agricultural production. The food service industry, which caters to both residents and international tourists, remains a key driver of agricultural demand.

India remains the UAE's leading cereal supplier, accounting for 40.3% of total imports in 2023, followed by Australia with a 12.3% share. This expanding demand presents strong opportunities for global exporters to engage with the UAE's growing food and agriculture market.

3. UAE: Food Processing Sector Overview[17]

The United Arab Emirates' food processing sector continues to grow, supported by robust economic performance and increasing domestic demand. There are over 568 food and beverage processing and manufacturing units in the UAE, the majority of which are small to medium-sized enterprises. While the sector primarily caters to domestic consumption, it is also increasingly focused on serving regional and global markets. However, due to limited domestic agricultural production, these firms rely almost entirely on imported raw materials and ingredients, particularly intermediate, commodity, and lightly processed agricultural products.

The UAE is a developed nation governed by a federalist monarchy. Foreign nationals make up nearly 90 percent of its highly diverse population. Approximately 80 percent of the country's agricultural products are imported. In 2022, the UAE imported USD 12.5 billion worth of consumer-oriented products, accounting for 59 percent of total agricultural imports. Key suppliers include the European Union, India, Brazil, the United States, and Saudi Arabia.

According to UAE government statistics, there are 568 food and beverage processing facilities in the country. Collectively, these factories produce approximately 5.96 million metric tons (MT) of food and beverage products annually, including 2.3 MT of staple food items. The sector plays a crucial role in the government's broader strategy to enhance food security and achieve greater self-sufficiency in essential commodities, despite its dependence on imported inputs.

Following supply chain disruptions in 2020, the UAE government intensified its food security initiatives and invested significantly in boosting domestic food production. As part of its goal to triple food production by 2030, the Abu Dhabi Agriculture and Food Safety Authority has allocated USD 272 million towards agricultural development projects. In parallel, the Dubai government has launched the first phase of 'Food Tech Valley'a major hub aimed at advancing food innovation and sustainable production.

The main staple food items processed in the UAE include dairy products, legumes, nuts, cooking oils, dates, poultry, and fish. Other processed food products include sugar, tea, pepper, eggs, rice, wheat, coffee, baby food, and fresh meat. Trade sources indicate that 85 percent of processed staple food products are consumed domestically, while the remaining 15 percent are exported. Of the locally consumed staple food, 85 percent is directed to retail channels and 15 percent to the foodservice sector. In the case of non-staple food products, only 10 percent is consumed locally, while 90 percent is exported of which 75 percent is distributed through retail and 25 percent through foodservice.

Table 3: 10 Top Consumer-Oriented Products Imports[18]

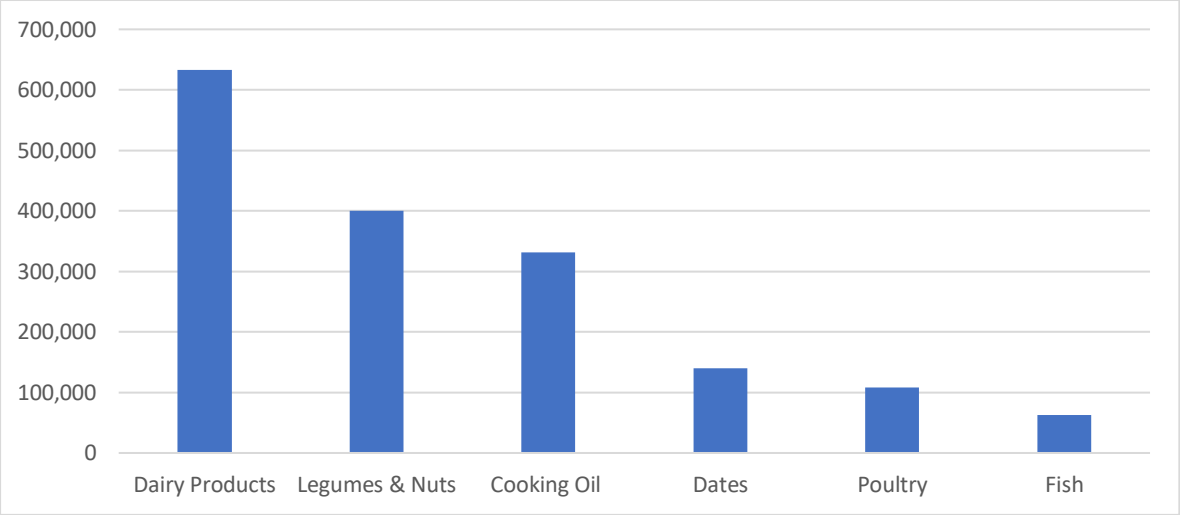
Dairy	USD 1.8 billion
Poultry meat & products	USD 1.19 billion
Tree nuts	USD 948 million
Fresh fruit	USD 946 million

[17] https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Food%20Processing%20Ingredients_Dubai_United%20Arab%20Emirates_TC2023-0004.pdf
[18] https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Food%20Processing%20Ingredients_Dubai_United%20Arab%20Emirates_TC2023-0004.pdf

Beef & beef products	USD 828 million
Bakery Goods	USD 738 million
Soup & Food Preparations	USD 671 million
Distilled Spirits	USD 594 million
Tobacco	USD 581 million
Meat Products (NESOI)	USD 429 million

The leading retail chains in the United Arab Emirates include Carrefour, Lulu Hypermarket, Union Co-operative Society, Abu Dhabi Co-operative Society, Sharjah Co-operative Society, Emirates Co-operative Society, Al Madina Hypermarket, Baniyas Co-operative Society, Nesto Hypermarket, Al Maya, Spinneys, Choithrams, and Waitrose.

Figure 1: Major UAE Food Processing Industry by Sector in Metric Tons (MT)[19]



Source: Emirates Food Security Council, Ministry of Energy and Infrastructure

The United Arab Emirates is home to 568 food and beverage processing facilities, primarily comprising small and medium-sized enterprises. The majority of these factories315 in totalare in Dubai, while the remainder are distributed across the other six emirates. Dubai also hosts Al Khaleej Sugar, the world's largest standalone sugar refinery, situated in Jebel Ali, with a production capacity of 24,000 metric tons per day. Additionally, Dubai houses several medium-sized nut processing facilities and three major edible oil crushing operations.

The UAE's food processing sector has expanded its export portfolio to include dairy products, tea, processed tobacco, prepared and processed foods, and canola oil. However, the sector remains heavily dependent on imported raw materials due to limited domestic agricultural production. Major sourcing competitors for bulk commodities include Russia, Canada, India, and Argentina.

In the dairy segment, local farms primarily produce fresh dairy products but face intense competition from imported processed dairy goods. Some local processors also reconstitute dairy products using milk powder, predominantly imported from Europe and New Zealand.

[19]https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Food%20Processing%20Ingredients_Dubai_United%20Arab%20Emirates_TC2023-0004.pdf

Sector Trends

The food processing sector plays a vital role in the UAE government's efforts to enhance food security and is expected to experience steady growth in the coming years. The government is making substantial investments to develop and support local processors. Dubai Exports, a key initiative of the Dubai government, serves as a platform to assist local food processors in accessing international markets and provides valuable market intelligence on various industrial sectors within the UAE.

Key drivers of the UAE's food processing sector include the government's strategic focus on food security, as outlined in the National Food Security Strategy 2051. This strategy aims to boost local production through investment incentives, support for agri-tech innovation, and enhanced trade facilitation.[20]Additionally, growing health consciousness among consumers is driving demand for healthier processed food categories, such as plant-based products and sugar-free alternatives.[21]The sector also benefits from the UAE's position as a major re-export and trading hub for the wider GCC, South Asia, and Africa, supported by its extensive network of free trade zones and world-class logistics infrastructure.[22]

Major Consumer Trends:

- The number of health-conscious consumers in the UAE is steadily increasing, with a growing demand for nutritious products featuring clear labelling. Interest in organic, sugar-free, and natural products has risen significantly in recent years. Additionally, there is a gradual shift in consumer preference toward locally produced items.
- However, UAE consumers are becoming more price-sensitive due to rising fuel costs and high inflation. Shoppers are increasingly balancing value for money with product quality - a trend expected to influence consumer purchasing behaviour throughout 2024 and 2025.
- In 2022, the pandemic-induced shift in consumption habits led to increased adoption of e-commerce platforms across the region. UAE retailers continue to invest in digital infrastructure, with new entrants such as Noon Daily and Amazon expanding into the online grocery retail segment. Online grocery shopping has emerged as a long-term trend and is expected to play an increasingly significant role in the UAE's retail landscape.
- The value of processed frozen food sales in the UAE grew by 32.7 percent between 2016 and 2022, as consumers sought convenient, ready-to-cook options for at-home consumption.

Food Service Sector

According to FAS Post Dubai, the United Arab Emirates (UAE) serves as a global hub for tourism, trade, and transportation, boasting world-class hotels and restaurants. Tourism alone contributes between 10% and 15% of the country's total economic activity each year. Emerging trends such as food markets offering a variety of international cuisines, food trucks, and healthy

[20]https://www.uae.gov.ae/en/about-the-uae/strategies-initiatives-and-awards/strategies-and-plans/national-food-security-strategy-2051
[21]https://www.dubaichambercommerce.com/en/
[22]www.trademap.org

fast-food options are gaining popularity across the UAE. In 2021, the hotel, restaurant, and institutional (HRI) market was valued at USD 12.3 billionan increase of nearly 17% from 2020.

Government statistics indicate that there are over 30,000 food outlets across the UAE, with approximately 60% located in the Emirate of Dubai. The UAE foodservice market is segmented by structure into independent and chain restaurants, and by type into full-service restaurants, limited-service restaurants, quick-service restaurants (QSRs), cafés and bars, as well as street stalls and kiosks. According to Euromonitor, full-service restaurants hold the largest share of the market, generating USD 6.7 billion in sales, followed by cafés and bars with USD 2.7 billion.

As per Dubai Municipality, the Emirate of Dubai is home to 18,667 foodservice establishments, including 9,705 restaurants, 4,310 coffee shops, 2,809 cafeterias, 840 hotels, 728 catering businesses, and 275 school canteens. Following the COVID-19 outbreak in 2020, online foodservice sales grew significantly, accounting for more than 16% of the market share in 2021a trend that is expected to continue in the coming years. Talabat leads the food delivery market in the UAE with a 74% share, followed by Deliveroo and Careem.

Yum! Brands Inc. held the largest share of the UAE foodservice market in 2021 at 3.3%. The top five companiesYum! Brands Inc., McDonald's Corporation, Restaurant Brands International Inc., Starbucks Corporation, and Subway's Doctor's Associates Inc.collectively accounted for 10.7% of the market. The UAE foodservice sector remains highly reliant on imported food products due to limited domestic agricultural production. The primary suppliers of consumer-oriented products include the European Union, Brazil, India, and Saudi Arabia.

Food Processing Sector

Numerous indoor farms have been established in the UAE, focusing on the production of fresh, perishable greens many of which utilize U.S. technology and agricultural inputs. The primary staple food items processed in the UAE include dairy products, legumes, nuts, cooking oil, dates, poultry, and fish. In addition, a variety of other food products are processed domestically, such as sugar, tea, pepper, eggs, rice, wheat, coffee, baby food, and fresh meat.

According to trade sources, approximately 85% of processed staple food products are consumed locally, with the remaining 15% exported. Government data indicates that 85% of these products are distributed through retail channels, while 15% are directed to the foodservice sector. For non-staple food products, only 10% are consumed within the country, and 90% are exported—of which 75% are allocated to retail and 25% to foodservice.

The UAE food processing industry was valued at approximately USD 7.5 billion in 2023 and is projected to grow at a compound annual growth rate (CAGR) of around 7% between 2024 and 2029.[23]

- Revenue in the UAE food market is projected to reach USD 39.75 billion in 2025, with an expected annual growth rate (CAGR 2025–2030) of 5.28%.[24]
- The largest market segment is Confectionery & Snacks, which is expected to generate USD 8.54 billion in 2025.[25]

[23] https://www.mordorintelligence.com/industry-reports/uae-food-processing-market
[24] https://www.statista.com/outlook/cmo/food/united-arab-emirates
[25] Ibid

- Globally, the highest revenue in the food market is projected to be generated in China, amounting to USD 2 trillion in 2025.[26]
- Based on total population figures, per capita revenue in the UAE food market is expected to be USD 3,500 in 2025.[27]
- Online sales are anticipated to account for 1.8% of total revenue in the food market by 2025.[28]
- The total volume of the UAE food market is expected to reach 9.90 billion kilograms by 2030, with a volume growth of 3.1% projected in 2026.[29]
- The average per capita consumption in the food market is expected to be 767.23 kilograms in 2025.[30]

Foreign Investment and Industrial Policy:[31]

The UAE government, through its "Operation 300bn" strategy, has identified food processing as a priority sector for industrial expansion. The initiative offers key incentives such as 100% foreign ownership in manufacturing, customs duty exemptions, and access to world-class logistics infrastructure.

Leading multinational companies including Nestlé, Almarai, and Agthia have expanded their local operations to cater to both domestic and regional markets. These efforts are supported by a robust ecosystem of SMEs, contract manufacturers, and technology providers (Dubai Industrial City, 2024).

Regulatory Environment[32]

The UAE maintains a robust regulatory framework, with the Emirates Authority for Standardization and Metrology (ESMA) enforcing stringent standards for food safety, labelling, and halal compliance. This regulatory regime is regularly aligned with Codex Alimentarius and the Gulf Standards Organization (GSO) to ensure that UAE-processed food products meet international standards and are export-ready.

[26] Ibid
[27] Ibid
[28] Ibid
[29] Ibid
[30] Ibid
[31] https://moiat.gov.ae/en/operation-300bn
[32] https://www.esma.gov.ae/en-us/Pages/default.aspx

4. Key Growth Drivers

Population and Income Growth

As the UAE's population continues to grow, there is a corresponding rise in demand for processed food products. Increased population leads to higher consumption levels, driving demand for packaged, ready-to-eat, and convenience food items. Additionally, the rise in disposable income plays a significant role, enabling consumers to explore a broader range of food options, including processed and premium products.

Lifestyle Changes

The shift in lifestyle patterns within the UAE has significantly influenced dietary preferences and eating habits. With ongoing urbanization and modernization, individuals and families are increasingly seeking convenient, time-saving food options to accommodate their busy routines. Processed foods meet these evolving preferences by offering pre-packaged meals, snacks, and beverages that are quick and easy to prepare and consume.

State Support

The UAE government recognizes the strategic importance of a strong food processing sector in ensuring food security and driving economic growth. To support this, it has introduced a range of policies and initiatives aimed at encouraging investment, enhancing infrastructure, streamlining regulations, and offering incentives to both domestic and international companies. This support includes funding programs, grants, tax benefits, and other measures designed to foster industry development and competitiveness.

Favourable Trade Agreements

The UAE's participation in regional and international trade agreements positively impacts the food processing sector. These agreements help reduce trade barriers, promote exports, and facilitate the import of raw materials, ingredients, and machinery essential for food processing. As a result, the sector gains access to a broader range of inputs and advanced technologies, enhancing product quality, diversity, and global competitiveness.

Key sub-sectors

Dairy Products

The UAE dairy processing market, valued between USD 4.8-5.0 billion in 2024, is projected to grow at a compound annual growth rate (CAGR) of approximately 4-5%, reaching up to USD 7 billion by 2032-2033[33].Key growth drivers include rapid population growth, rising urbanization, and increasing health consciousness, which is driving demand for low-fat, probiotic, and protein-enriched products.

In line with its broader food security agenda, the UAE government is promoting the localization of dairy production. However, domestic output continues to depend heavily on imports of milk and feedstocks.[34]

[33] https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Food+Processing+Ingredients+Annual_Dubai_United+Arab+Emirates_TC2024-0003.pdf&utm

[34] https://www.imarcgroup.com/uae-dairy-market?utm_

Processed & Frozen vegetables[35]

- Revenue in the Processed & Frozen Vegetables market in the UAE is projected to reach USD 429.31 million in 2025, with an expected annual growth rate (CAGR 2025–2030) of 4.44%.
- Globally, the highest revenue in this segment is expected to be generated in China, amounting to USD 64 billion in 2025.
- Based on total population figures, per capita revenue in the UAE is estimated at USD 37.84 in 2025.
- The market volume for Processed & Frozen Vegetables in the UAE is expected to reach 135.21 million kilograms by 2030, with a projected volume growth of 2.8% in 2026.
- The average volume per person is forecasted to be 10.9 kilograms in 2025.

Snack Food[36]

- Revenue in the Snack Food Market is projected to reach USD 43.61 million in 2025.
- The market is expected to grow at a compound annual growth rate (CAGR) of 12.63% between 2025 and 2029, reaching a projected volume of USD 70.17 million by 2029.
- The United States is expected to generate the highest revenue globally, with a projected market volume of USD 27.54 billion in 2025.
- The number of users in the UAE Snack Food Market is expected to reach 562.4 thousand by 2029.
- User penetration is forecasted at 5.1% in 2025, rising to 5.8% by 2029.
- The average revenue per user (ARPU) is expected to be USD 91.03.

Frozen Food[37]

The United Arab Emirates Frozen Food Market is estimated to be valued at USD 0.77 billion in 2025 and is projected to reach USD 1.10 billion by 2030, growing at a compound annual growth rate (CAGR) of 7.28% during the forecast period (2025–2030).

Robust demand for frozen food in the UAE is driven by several key factors, including growing urbanization, a large expatriate population, and increasing workforce participation. Urban consumers are showing strong interest in products that offer greater convenience at competitive prices. Furthermore, the rising popularity of modern retail formats and the presence of multinational food companies have contributed significantly to the growing demand for convenience foods, particularly frozen meals.

In the context of a rapidly evolving retail landscape, consumers are increasingly seeking seamless and integrated shopping experiences tailored to their changing preferences and needs. Reflecting this trend, in October 2023, a new grocery retail concept, 24seven, was launched in the UAE to tap into the booming USD 3.7 billion grocery retail market. A joint venture between UAE-based Lulu Group International and Saudi-based Fawaz Alhokair Group, 24seven aims to provide an omnichannel retail experience. The first store opened in Dubai, with plans to expand across the UAE and the wider GCC region. The company targets 100 stores by 2025.

[35] https://www.statista.com/outlook/cmo/food/vegetables/processed-frozen-vegetables/united-arab-emirates
[36] https://www.statista.com/outlook/emo/food/confectionery-snacks/snack-food/united-arab-emirates
[37] https://www.mordorintelligence.com/industry-reports/united-arab-emirates-frozen-food-market

Additionally, the growing immigrant population in the UAE is contributing to increased demand for frozen ethnic food products. In response, market players are expanding their production facilities and product portfolios, particularly in the frozen ready-meal segment. For example, in June 2022, Delektia Food, a Dubai-based frozen food company, launched more than 70 products, including frozen ready meals, and plans to expand into markets such as Oman, Kuwait, and Saudi Arabia.

The UAE frozen food market is highly competitive, with several players offering frozen and shelf-stable products across multiple distribution channels. To gain a competitive edge and maintain market presence, companies are adopting strategies such as partnerships, mergers, and acquisitions. They are also focusing on innovation and market expansion to broaden their product offerings and customer base.

Prominent players in the market include IFFCO, Al Islami Foods, The Savola Group, Americana Restaurants International PLC, and Unilever PLC.

Meat & Poultry[38]

The United Arab Emirates Poultry Meat Market is estimated to be valued at USD 1.23 billion in 2025 and is projected to reach USD 1.33 billion by 2030, growing at a compound annual growth rate (CAGR) of 1.62% during the forecast period (2025–2030).

The UAE poultry meat industry is undergoing significant transformation, driven by evolving consumer preferences and advancements in distribution technologies. The widespread adoption of digital platforms, supported by an internet penetration rate of 99% in 2022, has fundamentally changed how consumers purchase poultry products. This digital shift has accelerated industry consolidation, exemplified by the acquisition of Dubai-based Instashop by Germany's Delivery Hero, and a USD 1 billion investment by Abu Dhabi's ADQ in LuLu Hypermarket to strengthen its online presence. These developments highlight the sector's rapid adaptation to shifting consumer behaviour and the growing role of e-commerce in food retail.

To meet rising demand, the industry has seen notable growth in both consumption and import volumes. In 2022, poultry consumption in the UAE increased by 10.69% compared to 2019, while chicken imports surged by 90%, reaching 42,800 tons in February 2022. This sharp rise in imports reflects the country's strategic focus on food security and its response to increasing demand. The retail sector has seen strong growth, with online supermarket and hypermarket spending rising by 40% in 2022, compared to just 7% growth in offline sales.

Shifting workforce demographics and lifestyle trends are also influencing the industry's product offerings and distribution strategies. With women's workforce participation reaching 18.3% in 2022, there is growing demand for convenient, ready-to-cook poultry products. This shift has spurred product innovation and advancements in packaging, as manufacturers focus on delivering solutions that cater to time-constrained consumers without compromising on quality or freshness. In response, producers are expanding their product ranges and enhancing delivery systems, especially in urban areas where convenience is a top priority.

The tourism sector plays a vital role in shaping demand within the poultry meat market, particularly in the on-trade (hospitality) segment. In 2023, Dubai welcomed 910,000 Indian

[38] https://www.mordorintelligence.com/industry-reports/united-arab-emirates-poultry-meat-market

visitors, the highest among all nationalities, significantly impacting poultry consumption in the hospitality industry. This tourism-driven demand has encouraged greater product diversification, including the development of halal-certified offerings and region-specific preparations. The industry has responded by tailoring product lines and distribution networks to serve both the local population and the diverse international tourist base, contributing to the market's overall growth, sophistication, and maturity.

5. Food Processing: Key Stakeholders in the UAE

The food processing sector in the UAE is governed and regulated by multiple stakeholders, each playing a vital role in strengthening and supporting the industry. Some of the key stakeholders in the sector are listed below:

Government Institutions

Institution / Body	Key Food Processing Areas & Responsibilities
Ministry of Climate Change and Environment (MOCCAE)	National policy on food safety and food security; oversight of agricultural practices, animal and plant health; import/export regulation for food products; national food safety standards.
Ministry of Industry and Advanced Technology (MoIAT)	Leads the "Operation 300bn" industrial strategy; responsible for promoting food and beverage manufacturing, industrial policy, licensing, and incentives for the sector.
Emirates Authority for Standardization and Metrology (ESMA)	Develops/enforces national standards for food products, packaging, labelling, and Halal certification; monitors compliance with Gulf and Codex standards.
Abu Dhabi Agriculture and Food Safety Authority (ADAFSA)	Regulates, inspects, and licenses food establishments and processing facilities in Abu Dhabi; local food safety implementation; manages traceability and risk assessment.
Dubai Municipality – Food Safety Department	Licences and inspects food processing facilities in Dubai; enforces local food safety standards; responsible for Dubai Central Fruit & Vegetable Market operations and food recalls.
Sharjah Municipality – Public Health Division	Responsible for inspection, licensing, and enforcement of food safety and hygiene in Sharjah's food processing and retail sector.
Federal Customs Authority	Supervises import/export of food products, enforces safety and biosecurity at borders, ensures compliance with relevant food safety laws.

Department of Economic Development (DED) – each Emirate	Issues industrial/commercial licences for food processing businesses, monitors business compliance within emirate jurisdiction.

Major Industry Players

Company / Group	Key Food Processing Arenas	Popular Products
Agthia Group PJSC	Packaged food, bottled water, flour, animal feed, bakery, dairy	Al Ain Water, Al Faysal Bakery, Yoplait Dairy, Grand Mills Flour, Al Ain Tomato Paste
Almarai	Dairy, juices, bakery, poultry	Fresh milk, yoghurt, fruit juices, L'usine bread, Alyoum chicken
Al Ain Dairy	Dairy, juices, ice cream	Fresh milk, yoghurt, fruit juices, laban, ice cream
Emirates Food Industries (EFI)	Dairy, animal feed, flour, grains, oil	Hayatna milk & juices, Emirates Mills flour, raw feed products
Al Islami Foods	Frozen processed meat & poultry, seafood	Frozen chicken, beef burgers, sausages, seafood products
IFFCO Group	Edible oils, bakery, frozen foods, confectionery, dairy	Tiffany biscuits, London Dairy ice cream, Noor oils, Igloo frozen desserts
National Food Products Company (NFPC)	Dairy, juices, bottled water, snacks	Lacnor juices & milk, Oasis bottled water, Milco dairy products
Hunter Foods	Snacks, health foods, baked products	Hunter's Gourmet chips, Health Plus snacks, quinoa chips
Americana Group	Frozen foods, bakery, meat, poultry	Americana chicken nuggets, bakery products, burgers, frozen vegetables
Al Kabeer Group	Frozen ready meals, processed meat & seafood	Frozen kebabs, nuggets, samosas, seafood products
Dubai Refreshments (PepsiCo bottler)	Beverages (soft drinks, water, juices)	Pepsi, 7UP, Aquafina bottled water, Mountain Dew

6. UAE: Trade Overview

The UAE holds a significant position in the global economy, driven by its role as a major oil exporter and its ongoing efforts to diversify its economic base. Its status as a global trading hub is largely attributed to its vast oil reserves, which position the country among the world's leading oil producers and exporters.
In the context of the UAE's overall trade landscape, the following sections highlight key export and import products, along with the country's principal trading partners.

Key Export Products & Partners

Table 4: Export- Top Products

Code	Product label	Exported value in 2024
'151411	Low erucic acid rape or colza oil "fixed oil which has an erucic acid content of < 2%", crude	415204
'240220	Cigarettes, containing tobacco	242233
'170199	Cane or beet sugar and chemically pure sucrose, in solid form (excl. cane and beet sugar containing **...**	212864
'230641	Oilcake and other solid residues, whether or not ground or in the form of pellets, resulting **...**	191904
'190532	Waffles and wafers	161299
'160232	Meat or offal of fowls of the species "Gallus domesticus", prepared or preserved (excl. sausages **...**	111492
'030617	Frozen shrimps and prawns, even smoked, whether in shell or not, incl. shrimps and prawns in **...**	108123
'190110	Food preparations for infant use, put up for retail sale, of flour, groats, meal, starch or **...**	103967
'190590	Bread, pastry, cakes, biscuits and other bakers' wares, whether or not containing cocoa; communion **...**	75290
'210410	Soups and broths and preparations therefor	74774
'151419	Low erucic acid rape or colza oil "fixed oil which has an erucic acid content of < 2%" and **...**	71513
'210690	Food preparations, n.e.s.	68866
'160290	Prepared or preserved meat, offal, blood or insects (excl. meat or offal of poultry, swine **...**	64389
'040291	Milk and cream, concentrated but unsweetened (excl. in solid forms)	59942
'240311	Water-pipe tobacco (excl. tobacco-free. See subheading note 1.)	55059
'210390	Preparations for sauces and prepared sauces; mixed condiments and seasonings (excl. soya sauce, **...**	51654
'220830	Whiskies	51020
'180690	Chocolate and other preparations containing cocoa, in containers or immediate packings of <= **...**	47803
'160100	Sausages and similar products, of meat, meat offal, blood or insects; food preparations based **...**	47114

'030554	Dried herrings "Clupea harengus, Clupea pallasii", anchovies "Engraulis spp.", sardines "Sardina **...**	46493
'220210	Waters, incl. mineral and aerated, with added sugar, sweetener or flavour, for direct consumption **...**	43557

Table: Import- Top Products

Code	Product label	Imported value in 2024
'170114	Raw cane sugar, in solid form, not containing added flavouring or colouring matter (excl. cane **...**	1170749
'210690	Food preparations, n.e.s.	787619
'330290	Mixtures of odoriferous substances and mixtures, incl. alcoholic solutions, based on one or **...**	744451
'100630	Semi-milled or wholly milled rice, whether or not polished or glazed	682181
'151190	Palm oil and its fractions, whether or not refined (excl. chemically modified and crude)	541544
'240220	Cigarettes, containing tobacco	440361
'220830	Whiskies	376310
'040221	Milk and cream in solid forms, of a fat content by weight of > 1,5%, unsweetened	352639
'180690	Chocolate and other preparations containing cocoa, in containers or immediate packings of <= **...**	272265
'190190	Malt extract; food preparations of flour, groats, meal, starch or malt extract, not containing **...**	265239
'190590	Bread, pastry, cakes, biscuits and other bakers' wares, whether or not containing cocoa; communion **...**	242135
'220300	Beer made from malt	190295
'030617	Frozen shrimps and prawns, even smoked, whether in shell or not, incl. shrimps and prawns in **...**	184986
'330210	Mixtures of odoriferous substances and mixtures, incl. alcoholic solutions, with a basis of **...**	184582
'240399	Chewing tobacco, snuff and other manufactured tobacco and manufactured tobacco substitutes, **...**	174279
'220421	Wine of fresh grapes, incl. fortified wines, and grape must whose fermentation has been arrested **...**	166003
'230400	Oilcake and other solid residues, whether or not ground or in the form of pellets, resulting **...**	161314
'040690	Cheese (excl. fresh cheese, incl. whey cheese, curd, processed cheese, blue-veined cheese and **...**	156321
'160414	Prepared or preserved tunas, skipjack and Atlantic bonito, whole or in pieces (excl. minced)	150912
'200410	Potatoes, prepared or preserved otherwise than by vinegar or acetic acid, frozen	150703
'040291	Milk and cream, concentrated but unsweetened (excl. in solid forms)	144821

7. UAE – India Trade

India and the UAE have maintained strong trade relations for several decades. However, a significant shift in their economic partnership occurred after the 1990s, marked by a notable expansion in bilateral trade. India exports a wide range of products to the UAE, including minerals, gems and jewellery, machinery, equipment, and chemicals. Additionally, India is the third-largest importer of crude petroleum from the UAE.

UAE-India Bilateral Trade[39]

- India is the UAE's second-largest trading partner, accounting for 9% of the UAE's total foreign trade and 14% of its non-oil exports. Conversely, the UAE is India's third-largest trading partner.
- India-UAE trade has grown significantly, rising from USD 180 million per year in the 1970s to USD 84.84 billion in FY 2022–23.
- The non-oil trade value between India and the UAE is expected to exceed USD 100 billion over the next five years.
- Bilateral trade between India and the UAE reached USD 83.6 billion in FY 2023–24. After the USA and China, the UAE became India's third-largest trading partner and second-largest export destination.
- The UAE is the 7th-largest investor in India, with cumulative FDI inflows of USD 21.9 billion from April 2000 to September 2024.
- The UAE is home to approximately 3.5 million Indians, representing about 30% of the Emirate's population. Indians form the largest expatriate community in the UAE, and their remittances are a significant source of foreign exchange earnings for India.
- In FY25 (April-December) UAE imports Indian worth of USD 123.31million. during FY23 Indian tea export to UAE rose 65%.[40]

UAE Exports to India

Table 7: Top 5 UAE Exports to India over the last three years

HS code	Product Label	UAE's export to India (USD Thousand)			% Growth (2023-2024)	India's share% in UAE Agri- Food Exports in 2024
		2022	2023	2024		
220830	Whiskies	39,965	43,352	46,826	8%	1.31%
240311	Water-pipe tobacco (excl. tobacco-free. See subheading note 1.)	4,024	2,908	22,844	686%	0.64%
150710	Crude soya-bean oil, whether or not degummed	3158	0	19204	N/A*[41]	0.54%
151211	Crude sunflower-seed or safflower oil	0	270	14013	4732%	0.39%
330290	Mixtures of odoriferous substances and mixtures,	31,235	9,016	12,868	42.7%	0.36%

[39] https://www.ibef.org/indian-exports/india-uae-trade
[40] https://www.ibef.org/exports/indian-tea-industry
[41] N/A as 2023 value was 0

	incl. alcoholic solutions, based on one or					

Source: ITC Trade Map

UAE imports from India

Table 8: Top 5 UAE Imports from India over the last three years

HS code	Product Label	UAE's import from India (USD Thousand)			% Growth (2023-2024)	India's share% in UAE Agri- Food Imports in 2021 (USD Thousand)
		2022	2023	2024		
100630	Semi-milled or wholly milled rice, whether or not polished or glazed	431,496	463,678	495,268	6.8%	3.8%
240399	Chewing tobacco, snuff and other manufactured tobacco and manufactured tobacco substitutes	94,711	114,482	147,365	28.7%	1.13%
030617	Frozen shrimps and prawns, even smoked	115,696	109,223	119,645	9.5%	0.92%
230400	Oilcake and other solid residues	99	83,226	115,062	38.2%	0.88%
210690	Food preparations, n.e.s.	86,121	71,851	90,400	25.8%	0.69%

Source: ITC Trade Map

8. Investment opportunities for UAE - Areas of Collaboration

Establishing Joint R&D Centres for Food Innovation
India and the UAE could collaborate to establish joint research centres focused on developing functional foods, plant-based proteins, and sustainable packaging, leveraging India's scientific expertise and the UAE's investment capabilities. These centres would also facilitate the adaptation of climate-resilient technologies in food processing.

Smart Supply Chain Digitalisation Initiatives
Future collaboration could include joint investments in AI-driven supply chain management, blockchain-enabled traceability for food safety, and predictive analytics for demand planning—positioning the India-UAE corridor as a global leader in agri-logistics innovation.

Halal Food Processing
Given the UAE's adherence to halal food standards, there is strong potential for joint ventures in the production and export of halal-certified food products. India, with its large Muslim population and experience in halal practices, can work with the UAE to produce high-quality halal foods for domestic and international markets.

Circular Economy & Food Waste Reduction Technologies
Collaboration on waste valorisation technologies—such as converting food by-products into animal feed, bioenergy, or value-added products—can address sustainability goals. The UAE can contribute capital, while India offers technical know-how.

Nutraceuticals and Functional Food Development
Joint ventures in nutraceuticals and functional foods (e.g., fortified foods and dietary supplements) can cater to health-conscious consumers in the Middle East and South Asia. This would combine India's rich biodiversity with the UAE's regional market access.

Cold Chain Infrastructure for High-Value Perishables
Developing advanced, integrated cold chain infrastructure for dairy, seafood, and fresh produce can significantly reduce post-harvest losses and expand export opportunities for Indian producers through UAE's strategic logistics hubs.

Agri-Food Start-up Accelerators and Venture Fund
India and the UAE could jointly establish sector-specific start-up accelerators and venture capital funds, supporting innovations in agri-food technology, precision agriculture, and food safety, while facilitating reciprocal market access.

Joint Certification and Market Access Programmes
Creating mutual recognition systems for food safety, organic, and halal certifications would streamline export procedures, enhance SME participation, and promote bilateral agri-food trade.

Collaboration in HoReCA sector
The hotel industry, high end restaurants, and cafeterias of both the countries to collaborate and invest. UAE to invest in infrastructures while India to invest in kitchen, food, skilled manpower, and spa.

9. Conclusion

The United Arab Emirates has evolved into a strategic hub for food processing, re-exports, and agri-tech innovation, supported by its central geographic position between Asia, Africa, and Europe. World-class infrastructure, free trade zones, and robust policy frameworks have attracted significant investment in high-value processing, packaging, and distribution. Government-backed initiatives, including the National Food Security Strategy 2051 and the development of Food Tech Valley, are further reinforcing the country's position as a leader in sustainable and technologically advanced food systems.

Although domestic agricultural output is limited due to climatic constraints, the UAE ensures food availability through diversified import sources, efficient logistics, and strategic reserves. Increasing consumer demand for premium, health-focused, and convenience-based products is driving innovation in processing, cold chain expansion, and product development. The country's regulatory environment, which aligns with global food safety and quality standards, strengthens its competitive edge in international trade.

The UAE's extensive logistics capabilities, coupled with strong regional and global trade linkages, make it a natural gateway for processed food flows into GCC, African, and South Asian markets. Growth in e-commerce, modern retail chains, and integrated cold storage facilities is enabling faster, more reliable distribution, while enhancing export competitiveness. The country's emphasis on sustainability through waste reduction, energy efficiency, and smart farming aligns with global climate and resource efficiency goals.

Partnerships with global players particularly India offer significant opportunities in agri-raw material sourcing, technology transfer, halal-certified production, and joint R&D for health-oriented and specialty products. Such collaborations can strengthen bilateral trade, foster innovation, and create new export-ready product lines. As the UAE continues to invest in capacity building, digital transformation, and value addition, it is poised to expand its influence as a key driver of food trade and security in the Middle East and beyond.

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About World Food India

A global event to facilitate partnerships between Indian and international businesses and investors, World Food India (WFI) is a gateway to the Indian food economy and an opportunity to showcase, connect and collaborate.

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