



**Euromonitor
International**

Fresh Food in the United Arab Emirates

December 2025

Table of Contents

Fresh Food in the United Arab Emirates

EXECUTIVE SUMMARY

Fresh food sales on the rise as consumers pursue healthier lifestyles

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Fresh food in 2025: The big picture

Price sensitivity and busy lifestyles impact consumer shopping behaviour

Focus shifts to sustainable and reliable supply chains for key fresh foods

WHAT'S NEXT?

Supply chain stability will be key to growth over the forecast period

The shift towards healthier lifestyles should benefit fresh food sales

The United Arab Emirates set to be a benchmark for a modern fresh food ecosystem

CHANNELS

Price competitiveness and sustainability key features of the retail market

Online sales evolving thanks to increasing speed and efficiency

MARKET DATA

Table 1 - Total Sales of Fresh Food by Category: Total Volume 2020-2025

Table 2 - Total Sales of Fresh Food by Category: % Total Volume Growth 2020-2025

Table 3 - Retail Sales of Fresh Food by Category: Volume 2020-2025

Table 4 - Retail Sales of Fresh Food by Category: % Volume Growth 2020-2025

Table 5 - Retail Sales of Fresh Food by Category: Value 2020-2025

Table 6 - Retail Sales of Fresh Food by Category: % Value Growth 2020-2025

Table 7 - Retail Sales of Fresh Food by Packaged vs Unpackaged: % Volume 2020-2025

Table 8 - Retail Distribution of Fresh Food by Format: % Volume 2020-2025

Table 9 - Forecast Total Sales of Fresh Food by Category: Total Volume 2025-2030

Table 10 - Forecast Total Sales of Fresh Food by Category: % Total Volume Growth 2025-2030

Table 11 - Forecast Retail Sales of Fresh Food by Category: Volume 2025-2030

Table 12 - Forecast Retail Sales of Fresh Food by Category: % Volume Growth 2025-2030

Table 13 - Forecast Retail Sales of Fresh Food by Category: Value 2025-2030

Table 14 - Forecast Retail Sales of Fresh Food by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

Eggs in the United Arab Emirates

KEY DATA FINDINGS

2025 DEVELOPMENTS

Price controls ensure eggs remain a healthy and affordable staple

INDUSTRY PERFORMANCE

Temporary short-fall due to fire at Al Jazira farms fulfilled by other co-packing tie-ups

Al Ain Farms and Arabian Farms continue to win share

WHAT'S NEXT?

Federal price controls should continue to benefit the consumer

Private label on the rise while Q-commerce presents new sales opportunities
Summary 2 - Major Processors of Eggs 2025

CATEGORY DATA

- Table 15 - Total Sales of Eggs: Total Volume 2020-2025
- Table 16 - Total Sales of Eggs: % Total Volume Growth 2020-2025
- Table 17 - Retail Sales of Eggs: Volume 2020-2025
- Table 18 - Retail Sales of Eggs: % Volume Growth 2020-2025
- Table 19 - Retail Sales of Eggs: Value 2020-2025
- Table 20 - Retail Sales of Eggs: % Value Growth 2020-2025
- Table 21 - Retail Sales of Eggs by Packaged vs Unpackaged: % Volume 2020-2025
- Table 22 - Forecast Total Sales of Eggs: Total Volume 2025-2030
- Table 23 - Forecast Total Sales of Eggs: % Total Volume Growth 2025-2030
- Table 24 - Forecast Retail Sales of Eggs: Volume 2025-2030
- Table 25 - Forecast Retail Sales of Eggs: % Volume Growth 2025-2030
- Table 26 - Forecast Retail Sales of Eggs: Value 2025-2030
- Table 27 - Forecast Retail Sales of Eggs: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Fish and Seafood in the United Arab Emirates

KEY DATA FINDINGS

2025 DEVELOPMENTS

Strong and steady supply chain supports healthy growth in fish and seafood

INDUSTRY PERFORMANCE

Local aquaculture and reliable imports anchor price stability and food security
Clean-label convenience and provenance add value to the market

WHAT'S NEXT?

E-commerce set to play a bigger role in the growth of fresh fish and seafood
Format innovation helps narrow the convenience gap with frozen fish and seafood
Summary 3 - Major Processors of Fish and Seafood 2025

CATEGORY DATA

- Table 28 - Total Sales of Fish and Seafood by Category: Total Volume 2020-2025
- Table 29 - Total Sales of Fish and Seafood by Category: % Total Volume Growth 2020-2025
- Table 30 - Retail Sales of Fish and Seafood by Category: Volume 2020-2025
- Table 31 - Retail Sales of Fish and Seafood by Category: % Volume Growth 2020-2025
- Table 32 - Retail Sales of Fish and Seafood by Category: Value 2020-2025
- Table 33 - Retail Sales of Fish and Seafood by Category: % Value Growth 2020-2025
- Table 34 - Retail Sales of Fish and Seafood by Packaged vs Unpackaged: % Volume 2020-2025
- Table 35 - Forecast Total Sales of Fish and Seafood by Category: Total Volume 2025-2030
- Table 36 - Forecast Total Sales of Fish and Seafood by Category: % Total Volume Growth 2025-2030
- Table 37 - Forecast Retail Sales of Fish and Seafood by Category: Volume 2025-2030
- Table 38 - Forecast Retail Sales of Fish and Seafood by Category: % Volume Growth 2025-2030
- Table 39 - Forecast Retail Sales of Fish and Seafood by Category: Value 2025-2030
- Table 40 - Forecast Retail Sales of Fish and Seafood by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Fruits in the United Arab Emirates

KEY DATA FINDINGS

2025 DEVELOPMENTS

Orange shortage hits sales but demand for fruits remains robust in 2025

INDUSTRY PERFORMANCE

Global orange shortage drives up prices impacting imports and sales

Fresh fruits benefits from continuous focus on health and wellness

WHAT'S NEXT?

Diversified sourcing and free-trade agreements strengthen import resilience

Health and wellness to drive demand for premium and functional fruits

Summary 4 - Major Processors of Fruits 2025

CATEGORY DATA

Table 41 - Total Sales of Fruits by Category: Total Volume 2020-2025

Table 42 - Total Sales of Fruits by Category: % Total Volume Growth 2020-2025

Table 43 - Retail Sales of Fruits by Category: Volume 2020-2025

Table 44 - Retail Sales of Fruits by Category: % Volume Growth 2020-2025

Table 45 - Retail Sales of Fruits by Category: Value 2020-2025

Table 46 - Retail Sales of Fruits by Category: % Value Growth 2020-2025

Table 47 - Retail Sales of Fruits by Packaged vs Unpackaged: % Volume 2020-2025

Table 48 - Forecast Total Sales of Fruits by Category: Total Volume 2025-2030

Table 49 - Forecast Total Sales of Fruits by Category: % Total Volume Growth 2025-2030

Table 50 - Forecast Retail Sales of Fruits by Category: Volume 2025-2030

Table 51 - Forecast Retail Sales of Fruits by Category: % Volume Growth 2025-2030

Table 52 - Forecast Retail Sales of Fruits by Category: Value 2025-2030

Table 53 - Forecast Retail Sales of Fruits by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Meat in the United Arab Emirates](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Fresh meat remains a staple of the local diet despite economic pressures

INDUSTRY PERFORMANCE

Consumers trade down but stay loyal to fresh meat

Consumers willing to pay more for trusted and traceable meat

WHAT'S NEXT?

Premiumisation anchored in trust, traceability and sustainability

Convenience-led innovation gaining momentum

Summary 5 - Major Processors of Meat 2025

CATEGORY DATA

Table 54 - Total Sales of Meat by Category: Total Volume 2020-2025

Table 55 - Total Sales of Meat by Category: % Total Volume Growth 2020-2025

Table 56 - Retail Sales of Meat by Category: Volume 2020-2025

Table 57 - Retail Sales of Meat by Category: % Volume Growth 2020-2025

Table 58 - Retail Sales of Meat by Category: Value 2020-2025

Table 59 - Retail Sales of Meat by Category: % Value Growth 2020-2025

Table 60 - Retail Sales of Meat by Packaged vs Unpackaged: % Volume 2020-2025

Table 61 - Forecast Sales of Meat by Category: Total Volume 2025-2030
Table 62 - Forecast Sales of Meat by Category: % Total Volume Growth 2025-2030
Table 63 - Forecast Retail Sales of Meat by Category: Volume 2025-2030
Table 64 - Forecast Retail Sales of Meat by Category: % Volume Growth 2025-2030
Table 65 - Forecast Retail Sales of Meat by Category: Value 2025-2030
Table 66 - Forecast Retail Sales of Meat by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Nuts in the United Arab Emirates

KEY DATA FINDINGS

2025 DEVELOPMENTS

Nuts remains a popular snack and ingredient

INDUSTRY PERFORMANCE

Smaller packs and private label gain ground as price sensitivity deepens
Clean label snacking and foodservice integration sustain category momentum

WHAT'S NEXT?

Smaller packs and hybrid snack bars could shape the future of the market
Healthification and quality assurance could deliver premiumisation amid rising input risks
Summary 6 - Major Processors of Nuts 2025

CATEGORY DATA

Table 67 - Total Sales of Nuts by Category: Total Volume 2020-2025
Table 68 - Total Sales of Nuts by Category: % Total Volume Growth 2020-2025
Table 69 - Retail Sales of Nuts by Category: Volume 2020-2025
Table 70 - Retail Sales of Nuts by Category: % Volume Growth 2020-2025
Table 71 - Retail Sales of Nuts by Category: Value 2020-2025
Table 72 - Retail Sales of Nuts by Category: % Value Growth 2020-2025
Table 73 - Retail Sales of Nuts by Packaged vs Unpackaged: % Volume 2020-2025
Table 74 - Forecast Total Sales of Nuts by Category: Total Volume 2025-2030
Table 75 - Forecast Total Sales of Nuts by Category: % Total Volume Growth 2025-2030
Table 76 - Forecast Retail Sales of Nuts by Category: Volume 2025-2030
Table 77 - Forecast Retail Sales of Nuts by Category: % Volume Growth 2025-2030
Table 78 - Forecast Retail Sales of Nuts by Category: Value 2025-2030
Table 79 - Forecast Retail Sales of Nuts by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Pulses in the United Arab Emirates

KEY DATA FINDINGS

2025 DEVELOPMENTS

Pulses retain their appeal as a healthy staple in the local diet

INDUSTRY PERFORMANCE

Private label expansion and dual-sourcing cushion price volatility
Clean label convenience spurs everyday consumption

WHAT'S NEXT?

Private label and diversified imports helping to safeguard affordability

Convenience formats and wellness cues drive growth

Summary 7 - Major Processors of Pulses 2025

CATEGORY DATA

Table 80 - Total Sales of Pulses by Category: Total Volume 2020-2025

Table 81 - Total Sales of Pulses by Category: % Total Volume Growth 2020-2025

Table 82 - Retail Sales of Pulses by Category: Volume 2020-2025

Table 83 - Retail Sales of Pulses by Category: % Volume Growth 2020-2025

Table 84 - Retail Sales of Pulses by Category: Value 2020-2025

Table 85 - Retail Sales of Pulses by Category: % Value Growth 2020-2025

Table 86 - Retail Sales of Pulses by Packaged vs Unpackaged: % Volume 2020-2025

Table 87 - Forecast Total Sales of Pulses by Category: Total Volume 2025-2030

Table 88 - Forecast Total Sales of Pulses by Category: % Total Volume Growth 2025-2030

Table 89 - Forecast Retail Sales of Pulses by Category: Volume 2025-2030

Table 90 - Forecast Retail Sales of Pulses by Category: % Volume Growth 2025-2030

Table 91 - Forecast Retail Sales of Pulses by Category: Value 2025-2030

Table 92 - Forecast Retail Sales of Pulses by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Starchy Roots in the United Arab Emirates](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Starchy roots remains a key staple with new trends adding interest

INDUSTRY PERFORMANCE

Potatoes retain leadership as population growth and foodservice drives demand

Cassava gains traction through tapioca and bubble tea applications

WHAT'S NEXT?

Diversified sourcing and emerging local farming to strengthen food security

Convenience and health-led positioning driving innovation in sweet potatoes

Summary 8 - Major Processors of Starchy Roots 2025

CATEGORY DATA

Table 93 - Total Sales of Starchy Roots by Category: Total Volume 2020-2025

Table 94 - Total Sales of Starchy Roots by Category: % Total Volume Growth 2020-2025

Table 95 - Retail Sales of Starchy Roots by Category: Volume 2020-2025

Table 96 - Retail Sales of Starchy Roots by Category: % Volume Growth 2020-2025

Table 97 - Retail Sales of Starchy Roots by Category: Value 2020-2025

Table 98 - Retail Sales of Starchy Roots by Category: % Value Growth 2020-2025

Table 99 - Retail Sales of Starchy Roots by Packaged vs Unpackaged: % Volume 2020-2025

Table 100 - Forecast Total Sales of Starchy Roots by Category: Total Volume 2025-2030

Table 101 - Forecast Total Sales of Starchy Roots by Category: % Total Volume Growth 2025-2030

Table 102 - Forecast Retail Sales of Starchy Roots by Category: Volume 2025-2030

Table 103 - Forecast Retail Sales of Starchy Roots by Category: % Volume Growth 2025-2030

Table 104 - Forecast Retail Sales of Starchy Roots by Category: Value 2025-2030

Table 105 - Forecast Retail Sales of Starchy Roots by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Sugar and Sweeteners in the United Arab Emirates](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sales continue to rise in 2025 but health concerns present a growing threat

INDUSTRY PERFORMANCE

Sales of sugar and sweeteners resilient despite rising health concerns

Healthier and more affordable products seeing gains

WHAT'S NEXT?

Upcoming sugar tax likely to have a ripple effect on overall sugar consumption

Natural alternatives set to gain greater relevance

Summary 9 - Major Processors of Sugar and Sweeteners 2025

CATEGORY DATA

Table 106 - Total Sales of Sugar and Sweeteners: Total Volume 2020-2025

Table 107 - Total Sales of Sugar and Sweeteners: % Total Volume Growth 2020-2025

Table 108 - Retail Sales of Sugar and Sweeteners: Volume 2020-2025

Table 109 - Retail Sales of Sugar and Sweeteners: % Volume Growth 2020-2025

Table 110 - Retail Sales of Sugar and Sweeteners: Value 2020-2025

Table 111 - Retail Sales of Sugar and Sweeteners: % Value Growth 2020-2025

Table 112 - Retail Sales of Sugar and Sweeteners by Packaged vs Unpackaged: % Volume 2020-2025

Table 113 - Forecast Total Sales of Sugar and Sweeteners: Total Volume 2025-2030

Table 114 - Forecast Total Sales of Sugar and Sweeteners: % Total Volume Growth 2025-2030

Table 115 - Forecast Retail Sales of Sugar and Sweeteners: Volume 2025-2030

Table 116 - Forecast Retail Sales of Sugar and Sweeteners: % Volume Growth 2025-2030

Table 117 - Forecast Retail Sales of Sugar and Sweeteners: Value 2025-2030

Table 118 - Forecast Retail Sales of Sugar and Sweeteners: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Vegetables in the United Arab Emirates](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Improvements in the local supply chain paying dividends for vegetables

INDUSTRY PERFORMANCE

Local hydroponics and controlled-environment farming boosts supply resilience

From fresh produce to ready-to-eat solutions: vegetables gain everyday relevance

WHAT'S NEXT?

Supermarket private label lines expected to redefine value in fresh produce

Local hydroponics and controlled farming strengthening supply stability

Summary 10 - Major Processors of Vegetables 2025

CATEGORY DATA

Table 119 - Total Sales of Vegetables by Category: Total Volume 2020-2025

Table 120 - Total Sales of Vegetables by Category: % Total Volume Growth 2020-2025

Table 121 - Retail Sales of Vegetables by Category: Volume 2020-2025

Table 122 - Retail Sales of Vegetables by Category: % Volume Growth 2020-2025

Table 123 - Retail Sales of Vegetables by Category: Value 2020-2025

Table 124 - Retail Sales of Vegetables by Category: % Value Growth 2020-2025

Table 125 - Retail Sales of Vegetables by Packaged vs Unpackaged: % Volume 2020-2025

Table 126 - Forecast Total Sales of Vegetables by Category: Total Volume 2025-2030

Table 127 - Forecast Total Sales of Vegetables by Category: % Total Volume Growth 2025-2030

Table 128 - Forecast Retail Sales of Vegetables by Category: Volume 2025-2030

Table 129 - Forecast Retail Sales of Vegetables by Category: % Volume Growth 2025-2030

Table 130 - Forecast Retail Sales of Vegetables by Category: Value 2025-2030

Table 131 - Forecast Retail Sales of Vegetables by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/fresh-food-in-the-united-arab-emirates/report.