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Report Highlights:

Continuing economic growth; increasing tourism; a healthy hotel, restaurant, and institutional sector; and a growing population will lead the UAE's wheat and rice consumption to grow in the 2025-2026 marketing year (MY). Given the absence of local production, the UAE will increase wheat and rice imports to meet this demand. Government updates to the food price control system will limit rises in local prices for wheat flour, bread, and rice. The adjustment to the feed subsidy program and increased demand from the local poultry industry will support a MY 2025/26 rise in imports.

Executive Summary

In the 2025-2026 marketing year (MY), strong tourism, population growth, and expanding poultry and dairy sectors will increase demand for wheat, rice, and corn. With the absence of local grain production, the UAE will rely on imports to meet this increased demand. Maintaining strategic reserves enough for 3 to 6 months of basic food commodities, including grains, continues to be a top priority for the UAE's food security. The adjustment to Abu Dhabi Agriculture and Food Safety Authority's feed subsidy program (by distributing half of the allocated feed as grain pellets instead of exclusively forage) led to significant increase in corn imports in MY 2023/24. The government updates to the food price control system will limit any rise in local prices for wheat flour, bread, and rice.

Table 1: Consumption and Import Forecast Changes

Commodity	MY	Consumption		Imports	
		MY 2025/26	MY 2024/25	MY 2025/26	MY 2024/25
Wheat	June-July	1.75 MMT, up 3 percent or 50,000 MT	1.7 MMT, downward by 50,000 MT	1.980 MMT, up 2 percent or 30,000 MT	1.950 MMT, no change
Rice	January-December	1.0 MMT, up 2.5 percent or 25,000 MT	975,000 MT, no change	975,000 MT, up 2.6 percent or 25,000 MT	950,000 MT, no change
Corn	October-September	455,000 MT, up 3.5 percent or 15,000 MT	440,000 MT, downward by 5000 MT	465,000 MT, up 3.3 percent or 15,000 MT	450,000 MT, downward by 15,000 MT
Barley	October-September	360,000 MT	360,000 MT, no change	365,000 MT	365,000 MT, no change

Source: Post

Note: Not official USDA data

Report Coverage and Common Terms

This report covers wheat, rice, corn, and barley. Wheat includes wheat grain (HS 1001), wheat flour (HS 1101), pasta (HS 190219, HS 190230), couscous (HS 190240), and bulgur (190430) all converted to the wheat grain equivalent. Rice includes milled rice (HS 100630), broken rice (HS 100640), rough or paddy rice (HS 100610), and brown rice (HS 100620), all converted to the milled equivalent. Corn is HS 1005 and barley is HS 1003.

ADAFSA: Abu Dhabi Agriculture and Food Safety Authority

APHIS: United States Department of Agriculture Animal and Plant Health Inspection Service

COVID-19: coronavirus disease 2019

CY: calendar year

EU: European Union

FSI: food, seed, and industrial

GAFTA: Pan-Arab Free Trade Area agreement

GCC: Gulf Cooperation Council

HA: hectare

HS: Harmonized System

IMF: International Monetary Fund

KIZAD: Khalifa Industrial Zone Abu Dhabi

MFN: most favored nation

MMT: million metric ton

MT: metric ton

MY: marketing year

UAE: United Arab Emirates

UAECSC: United Arab Emirates Competitiveness and Statistics Center

USDA: United States Department of Agriculture

Commodity: Wheat

Table 2: Production, Supply, and Distribution of Wheat

Wheat	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jul 2023		Jul 2024		Jul 2025	
United Arab Emirates	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	591	591	621	621	0	621
Production (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	1930	1930	1950	1950	0	1980
TY Imports (1000 MT)	1930	1930	1950	1950	0	1980
TY Imp. from U.S. (1000 MT)	11	11	0	20	0	30
Total Supply (1000 MT)	2521	2521	2571	2571	0	2601
MY Exports (1000 MT)	250	250	250	250	0	250
TY Exports (1000 MT)	250	250	250	250	0	250
Feed and Residual (1000 MT)	150	150	150	150	0	150
FSI Consumption (1000 MT)	1500	1500	1550	1550	0	1600
Total Consumption (1000 MT)	1650	1650	1700	1700	0	1750
Ending Stocks (1000 MT)	621	621	621	621	0	601
Total Distribution (1000 MT)	2521	2521	2571	2571	0	2601
Yield (MT/HA)	0	0	0	0	0	0
(1000 HA) ,(1000 MT) ,(MT/HA)						
MY = Marketing Year, begins with the month listed at the top of each column						
TY = Trade Year, which for Wheat begins in July for all countries. TY 2025/2026 = July 2025 - June 2026						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Production

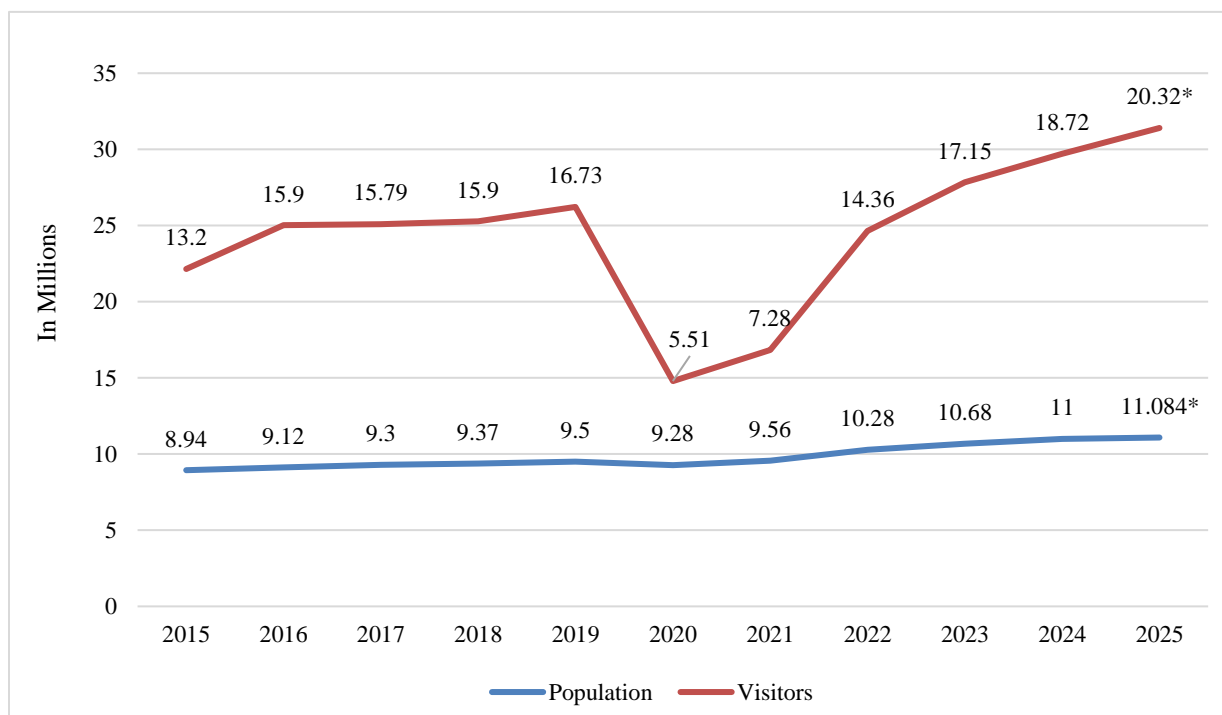
The United Arab Emirates is an arid country with limited water resources and little natural water recharge. Demand for water is mainly met through costly desalination programs and water recycling. Negligible rainfall precludes the production of row crops like wheat where the demand is primarily met through import and storage programs. Despite this, the government is attempting to increase rainfall, grow crops in desert areas that can withstand heat, and invest in agricultural production abroad. More information on these efforts may be found in the annual reports for Grain and Feed for [2023](#) and [2024](#).

Consumption

In the 2025-2026 marketing year (MY), the UAE's all wheat consumption (July 2025-June 2026) is forecast to increase slightly by 3 percent or 50,000 MT to reach 1.75 MMT. Post has revised the MY2024/25 all wheat consumption estimates downward to 1.7 MMT. Post attributes the increase in wheat consumption to continued economic growth; increasing tourism; a healthy hotel, restaurant, and institutional (HRI) sector; and a growing population.

The primary drivers of the UAE's wheat consumption are the country's growing population and continued annual increases in foreign visitors. The IMF [projected](#) the UAE's population to increase in 2025 by 84,000 to reach 11.08 million versus 11 million in 2024. Population is projected to grow yearly to reach 11.4 million by 2029 (Figure 1). Around 88 percent of the UAE's population are foreign nationals, a dynamic that is unlikely to change. The UAE's economic strategy centers on strengthening the country's position as an ideal destination to live, work, and invest. It does this, in part, by introducing new policies to attract foreign residence, leading to an influx of foreign workers.

Figure 1: UAE Population Growth and Foreign Visitors to Dubai, 2015-2025



*Projected

Source: IMF Population Numbers, Dubai Statistics Center, and Government of Dubai

More than 200 nationalities live in the UAE, of which 12 percent of the population are UAE citizens, and the remaining 88 percent expatriates. The largest group of foreign nationals in the UAE hail from India and Pakistan, representing more than 50 percent. For these groups and UAE citizens, wheat is a staple food, and various wheat-based items, including bread, pasta, pastries, and breakfast cereals are an integral part of their local diet. Bread features in the main dishes, often consumed two to three times per day. With the high-income levels of a large segment of UAE's population, consumers can afford to pay

more to get their preferred wheat-based commodities and wheat flour that is used to make their preferred bakeries and pastas. These consumers are not willing to shift or substitute their wheat flour products to other commodities.

In addition, for each of the last 10 years except during the COVID-19 pandemic, more tourists visited Dubai than the country's entire population. Dubai expects 20.32 million international overnight visitors this year, an increase of 1.6 million (8.5 percent) of the 18.72 million of international overnight visitors who visited Dubai in 2024. This growth aligns with the Dubai Economic Agenda D33 launched two years ago to further consolidate the Emirate's position as one of the top three global cities for business and leisure, and the best city to visit and in which to live and work.

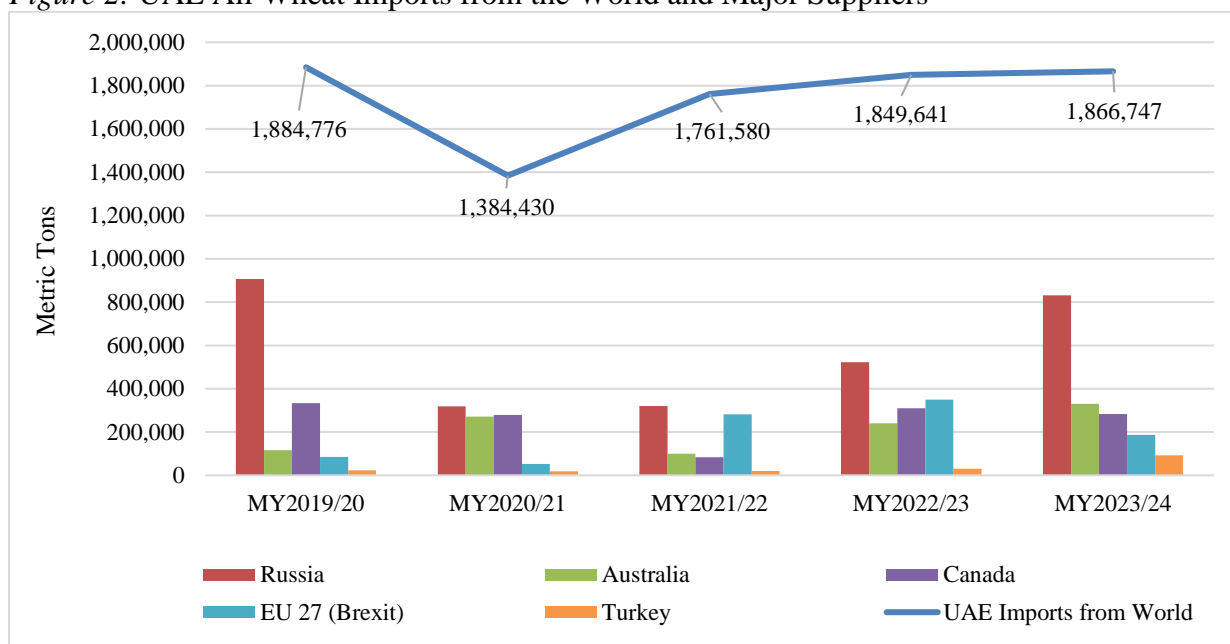
Trade

Imports

UAE MY 2025/26 all wheat imports (July 2025-June 2026) are forecast to increase by two percent or 30,000 MT at 1.980 MMT. Post has revised upward UAE all wheat imports for MY 2024/25 at 1.950 MMT. Post attributes this increase to the rising of domestic consumption because of the growing population and improved tourism sector. Around 92 percent of the UAE's wheat imports are raw products with the remainder coming in the form of wheat products such as flour, pasta, and couscous. Securing food commodities is a top priority for UAE's government as part of its food security strategy. Given the UAE's fiscal strength, the main food security challenge will not be grain prices but the availability of commodities at countries of origin. Fiscal strength will allow the UAE to continue to diversify wheat origins so long as oil rents remain high.

Trade Data Monitor reports that the UAE's MY 2023/24 all wheat imports increased by less than 1 percent or 17,106 MT at 1,866,747 MT compared to 1,849,641 MT in the previous marketing year. Imports for MY 2023/24 is closer to the UAE's official number of 1,803,095 MT based on data from the United Arab Emirates Competitiveness and Statistics Center (UAECSC). In MY 2023/24, Russia was the largest all wheat supplier to the UAE with total exports 831,000 MT versus 523,000 MT in MY 2022/23. From July 2024 through February 2025, Russia all wheat exports to UAE were at 647,000 MT and expected to increase by the end of the marketing year to reach over 800,000 MT. Russia continues to regain its position as UAE's major wheat supplier after the significant drop in exports in MY 2020/21 following Russia export measures to restrict wheat exports after the COVID-19 pandemic (Figure 2).

Figure 2: UAE All Wheat Imports from the World and Major Suppliers

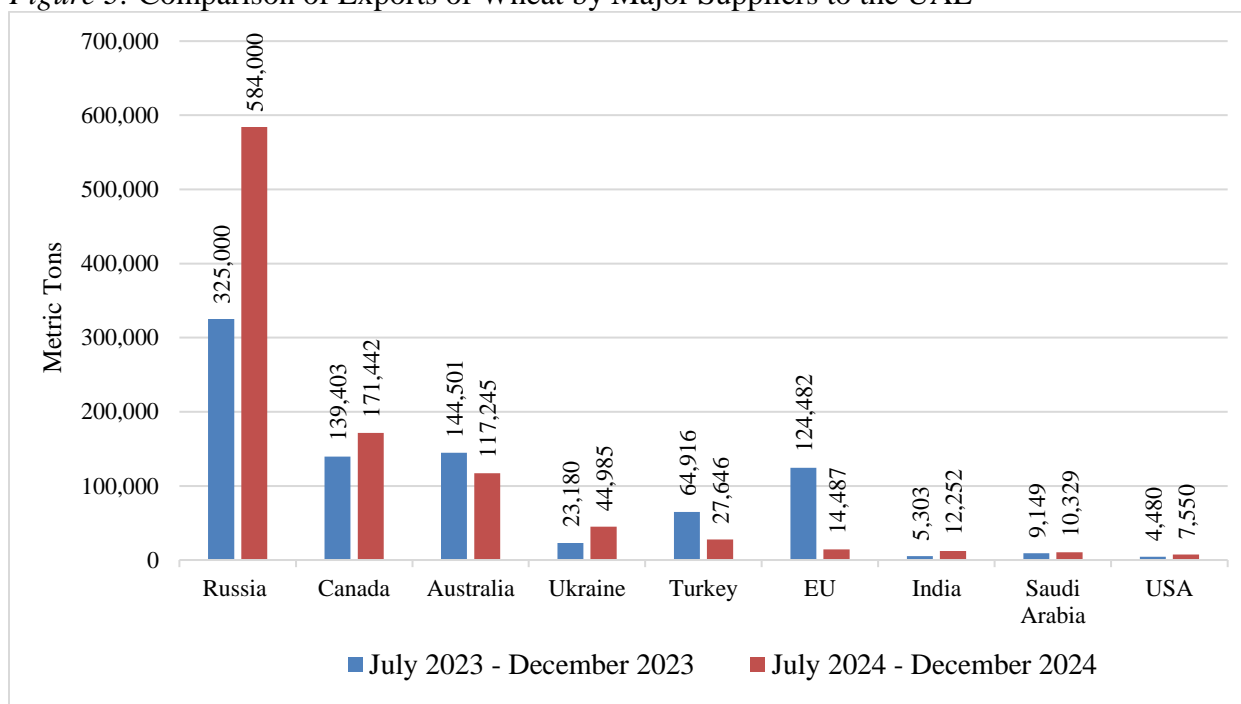


Source: Trade Data Monitor, LLC

Australia was the second largest all wheat supplier to UAE with total exports at 330,355 MT, versus 239,820 MT, an increase of 37 percent of 90,535 MT. Australia all wheat exports in MY 2023/24 were the highest since MY 2016/17. Türkiye was the fifth largest all wheat supplier to UAE with total exports of 91,981 MT versus 30,071 MT in previous year, an increase of 205 percent or 61,910 MT. Türkiye all wheat exports were mainly wheat grain 34,701 MT, Türkiye's first ever wheat grain shipment to UAE, wheat flour 42,000 MT, and pastas 14,517 MT. Post attributes this increase to competitive prices offered by Türkiye due to higher wheat production and favorable shipping costs.

From July 2024 through December 2024, all wheat exports from Australia, Türkiye, and the European Union (EU) to UAE dropped significantly compared to the exports from July 2023 through December 2023. Australia exports dropped by 19 percent or 27,256 MT at 117,491 MT compared to 144,501 MT. Türkiye exports dropped by 57 percent or 37,270 MT at 27,646 compared to 64,916 MT. EU exports dropped by 88 percent or 110,000 MT at 14,487 MT compared to 124,482 MT. On the other hand, from July 2024 through December 2024, all wheat exports to UAE from Russia, Ukraine, Canada, India, Saudi Arabia and United States have increased compared to their exports from July 2023 through December 2023 (Figure 3).

Figure 3: Comparison of Exports of Wheat by Major Suppliers to the UAE



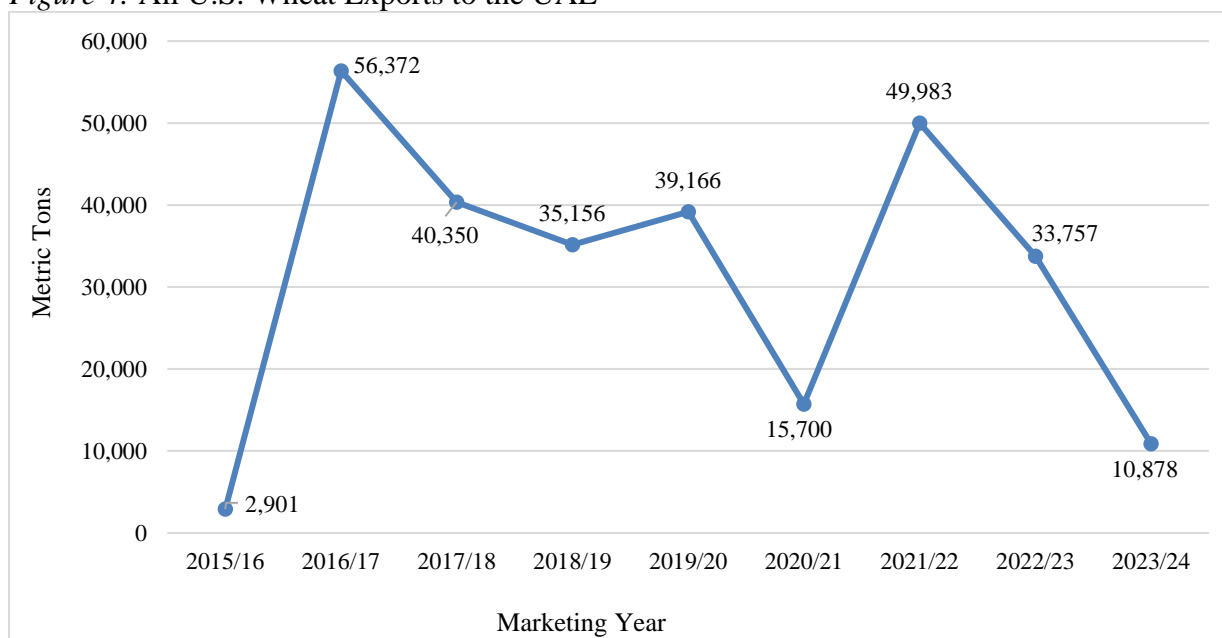
Source: Trade Data Monitor

U.S. Exports

Post forecasts U.S. exports of all wheat in MY 2025/26 to UAE to increase by 50 percent or 10,000 MT at 30,000 MT compared to 20,000 MT estimates for MY 2024/25. Some UAE flour producers appreciate the quality of U.S. wheat compared to other origins and will regularly buy at least one or two cargos for blending purposes.

In MY 2023/24, U.S. exports of all wheat to the UAE dropped by 67 percent or 22,879 MT at 10,878 MT compared to 33,757 MT in MY 2022/23 (Figure 4). The competitive prices primarily offered by Russia, Australia, Canada, the EU, and Türkiye provided opportunities for these origins to fulfill the majority of UAE domestic consumption needs. As of March 2025, U.S. wheat prices quoted \$252/MT versus \$272/MT the same time of 2024, Russia \$247/MT versus \$199/MT, the EU \$241/MT versus \$209/MT, Canada \$256/MT versus \$292/MT, Australia \$261/MT versus \$282/MT, and Argentina \$240/MT versus \$217/MT, respectively. From July 2024 through January 2025, U.S. exports to the UAE were at 8,838 MT versus 6,325 MT same period of MY 2023/24. UAE traders cite distance, the lack of regular vessel strings, and an inability to do grocery boats and unload at multiple ports of call as major reasons the United States remains a minority exporter.

Figure 4: All U.S. Wheat Exports to the UAE



Source: Trade Data Monitor

The UAE maintains zero import tariffs on wheat grain, wheat flour and five percent on pastas, couscous and bulgur (Table 3). These are most favored nation (MFN) tariffs charged on imports from all nations excluding preferential tariffs under free trade agreements. The UAE is a signatory and member of Gulf Cooperation Council (GCC), that includes the six GCC countries, and a signatory and member of the Pan-Arab Free Trade Area agreement (GAFTA), that includes all Arab countries, where tariffs among members of GCC and GAFTA are zero. The UAE is a signatory party of the GCC regional trade agreements with Singapore, and European Free Trade Association states (Iceland, Liechtenstein, Norway, and Switzerland). In addition, the UAE is a signatory of a number of bilateral free trade agreements including with India, Morocco, Türkiye, and New Zealand where the five MFN percent on pastas, couscous, and bulgur becomes zero.

The UAE is member of the World Trade Organization and has no import restrictions on wheat or wheat products. However, wheat and wheat shipments are subject to certain regulations to confirm the safety of the product and its fitness for human consumption. The UAE has negotiated a model health certificate for grain imports with a number of suppliers including the United States. The Animal and Plant Health Inspection Service (APHIS) phytosanitary certificate (PPQ Form 577) is accepted by the UAE. U.S. grain suppliers should be aware that all shipments are subject to a 14-day maximum allowance from the date of inspection to the date of export. Post departure issuance of phytosanitary certificates is generally not allowed.

Table 3: MFN Import Tariffs on Wheat Tariff Lines

Heading	HS Code	Description	Import Tariff Percentage
1001		Wheat and meslin	
	10011100	Durum wheat: Seed	0
	10011900	Durum wheat: Other	0
	10019100	Other: Seed	0
	10019910	Other: Normal Wheat	0
	10019920	Other: Thin Wheat	0
	10019930	Other: Meslin	0
1101		Wheat or meslin flour	
	11010010	Wheat flour	0
	11010020	Flour of mixed wheat and rye	0
1902		Pasta, whether or not cooked or stuffed (with meat or other substances) or otherwise prepared, such as spaghetti, macaroni, noodles, lasagna, gnocchi, ravioli, cannelloni; couscous, whether or not prepared	
	19021910	Macaroni, vermicelli and the like such as spaghetti or cannelloni in shape of shells, stars, letters and the like	5
	19021920	Pastas, frozen	5
	19021930	Chips of potato flour, macaroni-shaped, not ready	5
	19023000	Other pasta	5
	19024000	Couscous	5
1904		Prepared foods obtained by the swelling or roasting of cereals or cereal products (for example, corn flakes); cereals (other than maize [corn]) in grain form or in the form of flakes or other worked grains (except flour, groats, and meal), pre-cooked, or otherwise prepared, not elsewhere specified or included	5
	19043010	Containing cocoa	5
	19043090	Other	5

Source: [UAEs' Government Portal](#)

Exports

Post forecasts MY 2025/26 UAE wheat exports to remain unchanged from MY 2024/25 volumes at 250,000 MT. Most UAE exports are wheat flour and pasta that are locally produced by local flour mills and pasta manufacturers. The U.S. was the largest importer of UAE's all wheat exports at 30,895 MT versus 29,948 MT in the previous marketing year. Around 95 percent of UAE exports to the United States are wheat flour and 5 percent are pasta. Saudi Arabia was the second largest importer of all wheat from the UAE with total imports at 27,924 MT versus 30,325 MT in the previous marketing year, Mozambique 27,813 MT, Bahrain 26,375 MT, the Philippines 13,217 MT, and Sri Lanka 10,385 MT.

Over 90 percent of UAE exports are wheat flour and pastas with a few amounts (roughly 16,000 MT in MY2023/24 with over 90 percent of this number were exports to Mozambique) wheat grain. The UAE exports of all wheat are wheat grain imported by local importers for local consumption; however, the importer decided to re-export this wheat to other destinations. As the wheat has entered the UAE and not the free zone areas, it is recorded as exports. However, the re-export data is mainly for products traded by traders in the free zone areas.

Re-Exports

Dubai is one of the largest re-export hubs in the world and home to Jebel Ali port, one of the world's largest commercial ports and among the ten busiest, and the adjoining free zone hosts more than 20,000 companies taking advantage of the free zone. On March 28, 2023, UAE's Cabinet approved the "National Agenda for Re-Export Development 2030" that seeks to double re-exports from the UAE over the next seven years and deliver a 50 per cent increase in the added value to the UAE economy. This will be achieved through 24 new initiatives and programs that are designed to strengthen and deepen re-export markets, expand product categories for re-export, and streamline processes to attract more re-exports to the UAE.

The UAE is a major regional center in the international container trade, with large container ports in Jebel Ali, Sharjah, and Khalifa. Many products never get unloaded at the UAE's large free zones; some are lightly processed before being re-exported. Due to low tariffs and tax agreements both within the GCC and Arab League, many traders in the UAE import products only to quickly resell them to other markets. All of this heavily affects trade and consumption numbers. Other local traders and distributors sell these imported goods to foreign buyers once the product has officially entered the UAE and is recorded as "imports." Other big local importers import the products into the UAE and then decide to re-export the products to other countries.

According to UAECSC, the UAE's all wheat re-exports in MY 2023/24 were at 82,432 MT, a drop of 38 percent or 50,284 MT from previous year at 132,716 MT (Table 4). UAE All wheat re-exports from July through December 2024 were at 18,381 MT. Over 70 percent of UAE's all wheat re-exports in MY 2023/24 were wheat grain. In MY 2023/24, UAE re-exports of all wheat to Oman were at 28,453 MT, Kuwait 16,204 MT, Iraq 13,930 MT, Russia 12,881 MT, Yemen 12,733 MT, Bahrain 8,043 MT, and Australia 2,831 MT, KSA 2,587 MT, and dozens of other countries.

Table 4: UAE Re-Export Data for All Wheat in MT

HS Code	Description	MY 2022/23	MY 2023/24	July to December 2024
1001	wheat	117,436	62,308	4,987
1101	wheat flour	4,523	3,469	2,253
190219	uncooked pasta	5,260	9,647	8,351
190230	other pasta	5,251	6,899	2,687
190240	couscous	55	109	103
190430	bulgur	191	0	0
Total		132,716	82,432	18,381

Note: Wheat figures have been converted to wheat grain equivalents

Source: UAECSC

Stocks

Post forecasts MY 2025/26 wheat ending stocks to drop by 3 percent or 20,000 MT at 601,000 MT. Post has revised upward wheat stocks for MY 2024/25 at 621,000 MT. In cooperation with industry, the UAE government maintains large stocks in accordance with the federal strategic food reserve ensuring three months’ stock.

The UAE has a wheat milling capacity of 1.67 MMT per year and total storage capacity of around 920,000 MT; these capacities haven’t been changed since Post’s previous annual year report (Table 5). Wheat milling and processing is driven by re-export demand and local consumption. Diverse baked goods reflect the international origins of the UAE’s population, with Arab, Eastern, and Western baked goods widely available. White medium hard accounts for 70 percent of wheat imported to the UAE; the remainder is a blend of white hard and soft wheat. Soft red wheat is the least imported given its limited use in local baking.

Table 5: UAE’s Wheat Flour Milling Capacity in MT

Company	Annual Flour Milling Capacity	Storage Capacity
Al Dahra (Etihad Mills)	500,000	300,000
IFFCO	500,000	130,000
Al-Ghurair (National Mills)	300,000	300,000
Agthia (Grand Mills)	300,000	150,000
Others	70,000	40,000
Total	1,670,000	920,000

Source: Post

The COVID-19 pandemic, the war in Ukraine, tensions in the Red Sea, and other factors contributing to high commodity prices and other food security challenges have put downward pressure on food and feed consumption. This included all wheat-based commodities and animal products due to price increases for corn and fertilizers in the last couple of years. However, the UAE’s food stocks, lasting for three to six months, have helped temper price increases while government price ceilings for certain basic food commodities remain strictly enforced and have been limiting the ability of wholesalers and retailers to pass on higher input costs to consumers without prior government approval. To comply with price ceiling requirements, wholesalers and retailers are pressuring importers, producers, and manufacturers to maintain prices despite increased costs throughout the supply chain. The UAE’s price control system, the country’s fiscal ability to secure grain imports, and its ability to diversify grain suppliers, have all helped to moderate high prices negatively impacting local consumption.

Since January 2, 2025, the UAE government announced updates to its price policy that sets a six-month price freeze on nine basic food commodities including wheat and bread. Price increases for the listed nine food items must receive approval from UAE’s Ministry of Economy and not occur before six months prior to the previous increase. The government expects that the regulation will provide stability for these basic food commodities and safeguard consumers from sudden price hikes. In addition, the UAE’s government announced ministerial decrees that aim to monitor the market. This includes Ministerial Decree 246 of 2024 that focuses on prices of basic food commodities through detected teams to ensure no price increases without prior approval.

Consumers will have the ability to file complaints against any price increases they noticed in the local market. Wheat flour prices in the local market are stable thanks to the government price control system. The average retail price for a 5-kilogram package of all-purpose wheat flour is \$4.72 to \$11.11 (compared to \$3.92 to \$8.82 in 2024 prices).

Commodity: Rice

Table 6: Production, Supply and Distribution of Rice

Rice, Milled Market Year Begins United Arab Emirates	2023/2024		2024/2025		2025/2026	
	Jan 2024		Jan 2025		Jan 2026	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	325	325	275	250	0	225
Milled Production (1000 MT)	0	0	0	0	0	0
Rough Production (1000 MT)	0	0	0	0	0	0
Milling Rate (.9999) (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	875	900	925	950	0	975
TY Imports (1000 MT)	875	900	925	950	0	975
TY Imp. from U.S. (1000 MT)	2	0	0	0	0	0
Total Supply (1000 MT)	1200	1225	1200	1200	0	1200
MY Exports (1000 MT)	0	0	0	0	0	0
TY Exports (1000 MT)	0	0	0	0	0	0
Consumption and Residual (1000 MT)	925	950	950	975	0	1000
Ending Stocks (1000 MT)	275	250	250	225	0	200
Total Distribution (1000 MT)	1200	1200	1200	1200	0	1200
Yield (Rough) (MT/HA)	0	0	0	0	0	0
(1000 HA) ,(1000 MT) ,(MT/HA)						
MY = Marketing Year, begins with the month listed at the top of each column						
TY = Trade Year, which for Rice, Milled begins in January for all countries. TY 2025/2026 = January 2026 - December 2026						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Production

The United Arab Emirates is an arid country with limited water resources and little natural water recharge. Demand for water is mainly met through costly desalination programs and water recycling. Negligible rainfall precludes the production of row crops like rice where the demand is primarily met through import and storage programs. Despite this, the government is striving to increase rainfall, grow crops in desert areas that can withstand heat, and invest in agricultural production abroad.

Consumption

In MY 2025/26, UAE's rice consumption (January-December 2026) is forecast to increase slightly by 2.5 percent or 25,000 MT at 1.00 MMT compared to 975,000 MT estimates for MY 2024/25. Post attributes the increase in rice consumption to continued economic growth, increasing tourism, the HRI sector, and a growing population.

The primary drivers of the UAE's rice consumption are the country's growing population and the annual increase in foreign visitors. The IMF [projected](#) the UAE's population to increase in 2025 by 84,000 to reach 11.084 million versus 11 million in 2024. Population is projected to grow yearly to reach 11.4 million by 2029. Around 90 percent of the UAE's population are foreign nationals, a dynamic that is unlikely to change. The UAE's economic growth and government's strategy to strengthen its position as an ideal destination to live, work, and invest by introducing new policies to attract foreign residence, have led to an influx of foreign workers to the country.

More than 200 nationalities live in the UAE of which around 12 percent of the population are UAE citizens, and the remaining 88 percent of the population made up of expatriates. Basmati rice is the most popular rice variety in the UAE and consumed by locals, expatriates, and international visitors. The largest group of foreign nationals in the UAE hail from India and Pakistan, representing more than 50 percent. For these groups and UAE citizens, rice is a staple food, and various rice-based dishes are part of their local diet. With the high-income levels of large segments of the UAE's population, consumers can afford to pay more to get their preferred basmati rice. This rice is offered at premium higher prices compared to other rice varieties. These consumers are not willing to shift and substitute their basmati rice with any other commodities. Basmati rice feature in the main dishes, often consumed two to three times per day.

The average retail price for 5-kilogram package of Indian Basmati rice is \$9.80 to \$18.40, locally packaged basmati rice \$9.24 to \$10.62, Pakistani basmati rice \$11.57 to \$14.16, Australian rice \$11.95, and Egyptian medium grain rice \$11.71.

In early 2025, the UAE government announced a new pricing policy that sets six-month price freeze on nine basic food commodities including rice. This means that local sellers can submit a request of rice price increase only if the last price increase for the food item was six months prior to the request. The government expects that the regulation will provide stability in the prices of these basic food commodities and safeguarding consumers from sudden price hikes. In addition, the government announced ministerial decrees that aim to monitor the market. This includes Ministerial Decree Number 246 of 2024 on monitoring the prices of the basic food commodities through detected teams to ensure no price increases without prior approval. Consumers will have the ability to file complaints against any rice price increases they noticed in the local market.

Most rice is bulk bag packaged and sold through super- and hyper- markets. Indian and Pakistani basmati rice is prevalent but other rice varieties from other origins like the United States, Australia, Thailand, Egypt, and the Philippines are available. The Al-Dahra rice facility, which launched in 2016 and is owned by Al-Dahra Holdings, located in the Khalifa Industrial Zone Abu Dhabi (KIZAD), is the UAE's major rice mill that packs and distributes basmati rice. Al-Dahra imports white basmati rice mainly from India for re-packaging for the local market.

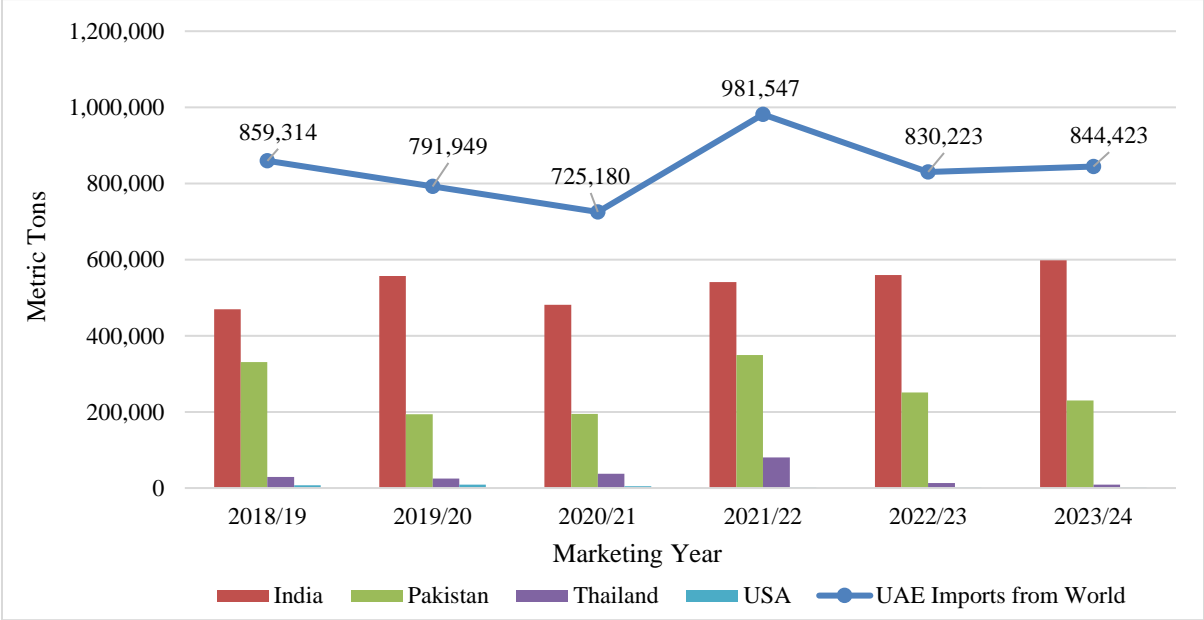
The Al-Dahra facility has up to 120,000 MT production capacity with 40 silos with storage capacity of 750 MT each which brings total storage capacity to 30,000 MT. Around 20,000 MT of basmati rice are stocked in the facility for the operation and as part of the government’s strategic reserve. The stock is distributed when needed to certain areas in UAE and not the whole country. According to Al-Dahra, the facility has never run on full production capacity. The highest capacity ever reached was 80,000 MT during the COVID-19 pandemic due to increased demand and to support government aid initiatives. In 2024, production dropped to around 35,000 MT of rice due to cuts in its contracts with two main buyers. The facility is used to supply 15,000 MT to the UAE’s Sheikh Khalifa Bin Zayed Al Nahyan Foundation for Humanitarian Works and 30,000 MT to the Abu Dhabi Agriculture and Food Safety Authority (ADAFSA). The first contract with Khalifa Foundation has not been renewed and the second contract with ADAFSA has been cut by 50 percent to 15,000 MT. ADAFSA, which uses the rice for the local subsidy program, is now sourcing the other 15,000 MT from another local trader. Al-Dahra is compensating through increased sales to the private sector with plans to expand to local hypermarkets.

Trade

Imports

Post forecasts MY 2025/26 rice imports (January-December 2026) to increase slightly by 2.6 percent or 25,000 MT at 975,000 MT compared to 950,000 MT estimates for MY 2024/25. Post attributes this increase to strong local consumption and the UAE government’s mandatory policy to keep stocks for at least three months. Around 98 percent of the UAE’s rice imports are milled and semi-milled while the other 2 percent are brown and broken rice. Indian and other Asian expatriates represent most of the UAE population and prefer rice that originates from their home countries, mainly basmati rice. According to Trade Data Monitor, India, Pakistan, and Thailand were the major rice suppliers to the UAE in MY 2022/23. They are expected to maintain the same position for the coming marketing year especially with the competitive prices offered due to improved local production (Figure 5).

Figure 5: UAE Rice Imports from the World and Major Suppliers



Source: Trade Data Monitor

According to Trade Data Monitor, in MY 2023/24, the UAE's rice imports increased by increased slightly by 1.7 percent or 14,200 MT at 844,423 MT compared to 830,223 MT in previous marketing year. The UAECSC has reported UAE's total rice imports in MY 2023/24 at 816,202 MT compared to 777,426 MT reported to previous marketing year.

In MY 2023/24, India's rice exports increased by 7 percent or 38,747 MT at 598,389 MT compared to 559,642 MT in previous marketing year. In late September 2024, India lifted its export ban on non-basmati white rice which resulted in higher exports and easing local prices of popular varieties that are in high demand by UAE consumers. The UAE-India free trade agreement that entered into force in 2022 had no significant impact on India rice exports as UAE tariffs on all rice varieties are zero. Although Pakistan's exports number for November and December of 2024 are not reflected in Trade Data Monitor, the country is expected to remain the second largest rice exporter to the UAE in MY 2023/24 with total estimated exports at 230,000 MT. From January through October 2024, Pakistan's exports were at 183,125 MT.

The UAE maintain zero import tariffs on all nations. The UAE is member of the World Trade Organization and has no import restrictions on rice. However, rice imports are subject to certain regulations to confirm the safety of the product, and its fitness for human consumption. The UAE has negotiated model of health certificates for grain imports with numbers of suppliers including the United States. APHIS's Phytosanitary Certificate (PPQ Form 577) is accepted by the UAE. However, U.S. grain suppliers should be aware that all shipments are subject to a 14 days' maximum allowance from the date of inspection to the date of export. Post departure issuance of phytosanitary certificates is not generally allowed.

Exports

Post forecasts UAE rice exports to remain at zero in MY 2025/26. The UAE's centrality to global food trade flows, especially to the Middle East and North Africa, have enabled the country's emergence as a re-export hub. Exports numbers in Trade Data Monitor, reported importing countries buying rice from UAE, should be counted as re-exports from UAE. UAE imports minimal amounts of paddy rice from Pakistan, around 200 MT, and so there is no full milling process in the country. The rice milling industry does basic processing by cleaning and packaging of the imported basmati rice to be sold mainly in the local market with small quantities are re-exported to other countries.

According to Trade Data Monitor, in MY 2023/24, UAE rice exports dropped by 39 percent or 12,785 MT at 20,054 MT compared to 32,839 MT in the previous marketing year. UAECSC reports total exports of rice in MY 2023/24 were minimal but re-exports were at 20,622 MT versus 40,359 MT in MY 2022/23. In MY 2023/24, top markets for rice exports included Zimbabwe, Mozambique, Ghana, the United States, Senegal, Saudi Arabia, Canada, and Kenya (Table 7).

Table 7: UAE Total Rice Exports by Major Destination for MY 2021/22 in MT

Country	MY 2022/23	MY 2023/24
Zimbabwe	1,674	8,728
Mozambique	14,591	6,965
Ghana	1,323	943
United States	785	817
Senegal	27	518
Saudi Arabia	139	193
Canada	346	180
Kenya	12,956	84
Others	998	1,626
Total	32,839	20,054

Source: Trade Data Monitor

Over 97 percent of UAE rice re-exports are of rice, semi-milled or wholly milled, whether or not polished or glazed (HS 100630) (Table 8).

Table 8: UAE Re-Export Data for Rice in MT

HS Code	Description	MY 2021/22	MY 2022/23	MY 2023/24
100610	rice in the husk (paddy or rough)	1,355	132	228
100620	rice, husked (brown)	1,609	500	129
100630	rice, semi-milled or wholly milled, whether or not polished or glazed	74,807	39,252	20,112
100640	rice, broken	2,737	475	153
Total		80,508	40,359	20,622

Note: Rice figures have been converted to milled rice equivalents

Source: UAECSC

U.S. Rice Exports to Remain Lower

In MY 2023/24, the United States maintained its position as the fourth largest rice supplier to the UAE with total exports of 2,219 MT, slight increase of 1.6 percent or 36 MT at 2,219 MT compared to 2,183 MT in previous marketing year. Post forecasts U.S. exports to remain modest at 2,000 MT. For the last 15 years, U.S. exports of rice to the UAE have ranged between 2,000 MT and 11,000 MT. U.S. rice prices in UAE hypermarkets are often 13-15 percent higher when compared to the same varieties from other origins. These higher prices are due primarily to shipping costs.

Stocks

Post forecasts MY 2025/26 rice ending stocks at 200,000 MT, a drop of 11 percent or 25,000 MT from the previous marketing year at 225,000 MT. The UAE maintains three months' supply in its strategic food reserves to combat global food price inflation. However, the majority represents stock traders' and millers' carryover into the next marketing year from the previous year.

Commodity: Corn

Table 9: Production, Supply, and Distribution of Corn

Corn Market Year Begins United Arab Emirates	2023/2024		2024/2025		2025/2026	
	Oct 2023		Oct 2024		Oct 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	20	20	20	20	0	20
Production (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	634	657	450	450	0	465
TY Imports (1000 MT)	634	657	450	450	0	465
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	654	677	470	470	0	485
MY Exports (1000 MT)	5	6	20	10	0	10
TY Exports (1000 MT)	5	6	20	10	0	10
Feed and Residual (1000 MT)	629	651	430	440	0	455
FSI Consumption (1000 MT)	0	0	0	0	0	0
Total Consumption (1000 MT)	629	651	430	440	0	455
Ending Stocks (1000 MT)	20	20	20	20	0	20
Total Distribution (1000 MT)	654	677	470	470	0	485
Yield (MT/HA)	0	0	0	0	0	0
(1000 HA) ,(1000 MT) ,(MT/HA)						
MY = Marketing Year, begins with the month listed at the top of each column						
TY = Trade Year, which for Corn begins in October for all countries. TY 2025/2026 = October 2025 - September 2026						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Corn Production

The United Arab Emirates is an arid country with limited water resources and little natural water recharge. Demand for water is mainly met through costly desalination programs and water recycling. Negligible rainfall precludes the production of row crops like corn where the demand is primarily met through import and storage programs. With these severe conditions, UAE has minimal area planted with corn. In the Emirate of Abu Dhabi, the total area planted with corn in 2022/2023 were at 181 hectares produced around 3,566 MT. Despite these facts, the government is attempting to increase rainfall, grow crops in desert areas that can withstand heat, and invest in agricultural production abroad.

Consumption

MY 2025/26 corn consumption (October 2024–September 2025) is forecast to increase by 3.5 percent or 15,000 MT at 455,000 MT. Post has revised MY 2024/25 corn consumption downward to 440,000 MT. Post attributes the increase in corn consumption to the growing demand from the livestock sector led by the poultry industry, as most corn imports go into feed for poultry production. The UAE consumes around 3 MMT of grain and forage products annually. In addition to corn and barley, the UAE imports hay, soybean meal, and alfalfa to feed around 4.8 million head of cows, camels, sheep, and goats in addition to 44 UAE poultry farms producing meat and eggs for the country and other markets in the GCC.

The UAE's poultry industry continues to expand production to meet the growing local demand. The local demand for meat is driven by population growth, improvement in the tourism sector, and high demand from the HRI sector. A leading UAE's agricultural company, Al Ghuarir Foods, is launching a new integrated poultry facility, hatchery and processing plant, and the largest rendering plant in the UAE. The project that will establish in the Khalifa Economic Zones Abu Dhabi. It is expected to be operational by 2026 with initial production target of 10 million day-old chicks (from hatchery and processing of 10,000 MT of poultry meat per annum). The government decision in 2023 to raise poultry meat and table eggs prices by 13 percent was a relief for the local poultry industry after years of challenges due to higher input prices. In addition, Al-Rawabi, one of the UAE's major dairy and juice producers, is establishing a production dairy farm facility in KIZAD. The dairy farm will be the home of 10,000 Al-Rawabi cows which will produce 23 million liters of fresh milk in the first operational year. The facility will include milk parlors, a dairy plant, and a feed factory.

In 2024, ADAFSA adjusted its feed subsidy program by distributing 50 percent grain pellets and 50 percent forage, a shift in longstanding policy of distributing majority of the feed subsidy in the form of forage. Given most livestock production in the UAE occurs in Abu Dhabi, ADAFSA operates a fixed-price feed subsidy program through the Agthia Group and National Fodder. Emirati farmers located in Abu Dhabi and government-owned agribusinesses can purchase both fodder and feed grain for a discount based on the difference between a government set fixed price and the current prevailing market price. More than 1.2 MMT of subsidized feed is distributed every year under this feed subsidy program.

There are five local manufacturers of chicken feed in UAE, one in Dubai, another in Abu Dhabi, and others in Sharjah, Ras Al Khaimah, and Fujairah. Most manufacturing companies import raw materials and adjust the ratio of the feed ingredients based on the age of the bird, breed, and market demand. The three main types of poultry feed that are available in the UAE and Dubai are concentrates, roughages, and blended feeds, with most ingredients of animal feed in the local market imported from abroad.

Trade

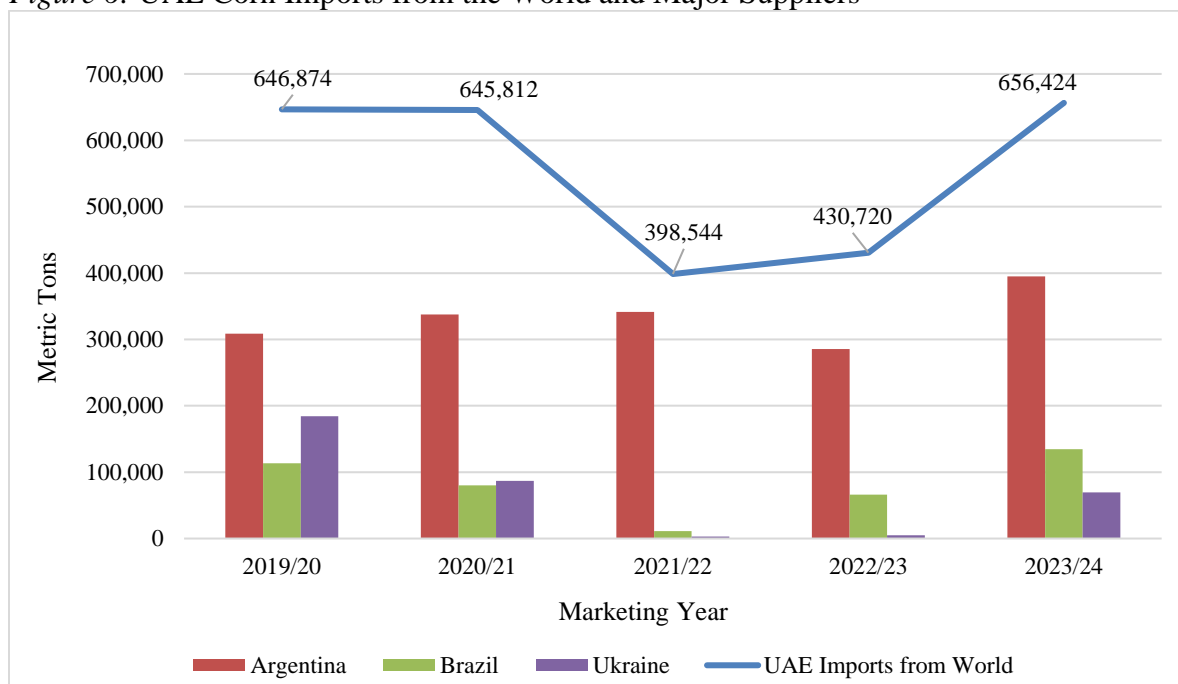
Imports

Post forecasts MY 2025/26 corn imports (October 2023–September 2024) to increase by 3.3 percent or 15,000 MT at 465,000 MT. Post has revised UAE MY 2024/25 estimates downward to 450,000 MT. Post attributes this increase to growing demand from the dairy and poultry industries. Post revised MY

2023/24 imports upward to 657,000 MT following data released by the government and Trade Data Monitor.

In MY 2023/24 (October 2023–September 2024), UAE corn imports increased by 52 percent or 225,704 MT at 656,424 MT compared to 430,720 MT in previous marketing year (Figure 6). Post attributes this increase to ADAFSA’s changes to the feed subsidy program. As a result, UAE MY 2023/24, alfalfa imports dropped by 45 percent or 213,179 MT at 255,108 MT compared to 468,287 MT in the previous marketing year. Imports of hay dropped by 55 percent or 471,553 MT at 379,080 MT compared to 850,633 MT in MY 2022/23. Prior to MY 2022/23, UAE used to import over 1.0 MMT of hay.

Figure 6: UAE Corn Imports from the World and Major Suppliers



Source: Trade Data Monitor

Argentina retained its position as the UAE’s major corn supplier with total exports of 394,921 MT, an increase of 38 percent or 109,471 MT compared to previous marketing year exports at 285,450 MT. From October 2024 through February 2025, Argentina corn exports to the UAE increased by 91 percent or 64,374 MT at 135,396 MT compared to 71,022 MT during same period of previous year. Argentina exports represent 60 percent of UAE’s total corn imports due to competitive prices compared to other origins. South American origins for corn is preferred in the UAE due to the ease of booking multiple cargos and more logistical flexibility. Like wheat, the war in Ukraine has had a deleterious impact on the UAE’s imports of Ukrainian corn during MY 2021/22 and MY 2022/23, which dropped by more than 90 percent compared to exports in previous marketing years.

The UAE maintains zero import tariff on corn imports from all nations. The UAE is member of the World Trade Organization and has no import restrictions on corn. However, corn imports are subject to certain regulations to confirm the safety of the product. The UAE has negotiated model of health certificates for grains with a number of suppliers including the United States. APHIS’s Phytosanitary Certificate (PPQ Form 577) is accepted by the UAE. However, U.S. grain suppliers should be aware that

all shipments are subject to a 14 days' maximum allowance from the date of inspection to the date of export. Post departure issuance of phytosanitary certificates is generally not allowed.

Exports

Post forecasts UAE corn exports to in MY 2024/25 to remain unchanged at 10,000 MT. In MY 2023/24, the UAE's exports of corn increased by 104 percent or 1,500 MT at 2,936 MT compared to 1,436 MT in previous marketing year. The UAECSC reported UAE corn exports in MY 2023/24 at 3,785 MT. The increase in UAE's corn exports was due to higher demand from Ethiopia and Saudi Arabia. UAE corn exports to Ethiopia increased by 200 percent or 2,080 MT at 3,120 MT compared to 1,040 MT in the previous marketing year while exports to Saudi Arabia increased by 8 percent or 112 MT at 1,484 MT compared to 1,372 MT.

UAE corn exports are largely imported by local traders and distributors who sell these imported goods to foreign buyers once the product has officially entered the UAE and is recorded as "imports." Other big local importers bring the products into the UAE and then decided to re-export the products in search of higher profits or to off-load surplus product.

In MY 2023/24, U.S. corn exports to the UAE dropped by 35 percent or 1,164 MT at 2,098 MT compared to 3,262 MT in previous marketing year. From October 2024 through January 2025, U.S. corn exports to UAE were at 894 MT, a drop of 57 percent or 324 MT compared to 570 MT during the same period in previous marketing year. Favorable prices offered by competitor suppliers, mainly Argentina and Brazil, played the main role in limiting U.S. competitiveness in the UAE market. In MY 2020/21, the United States was the UAE's second largest corn supplier with 15 percent market share and U.S. corn exports to the UAE reached their highest volume in recent history, increasing by 68,997 MT or 265 percent at 94,961 MT. The increase in U.S. exports in MY 2020/21 was due to a drop in Ukrainian and Brazilian exports.

Re-Exports

According to UAECSC, in MY 2023/24, UAE corn re-exports were at 3,785 MT while re-exports were at 44,586 MT. Top re-export markets for corn re-exported through the UAE include Qatar, Saudi Arabia, Iraq, Iran, Oman, Bahrain, and Djibouti.

Stocks

Post forecasts MY 2025/26 corn ending stocks to remain unchanged from the previous year at 20,000 MT. At least 50 percent of these stocks are carryover maintained by feed mills and traders with the remainder apportioned to food security reserves.

Commodity: Barley

Table 10: Production, Supply and Distribution of Barley

Barley	2023/2024		2024/2025		2025/2026	
Market Year Begins	Oct 2023		Oct 2024		Oct 2025	
United Arab Emirates	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	320	350	300	365	0	365
TY Imports (1000 MT)	320	350	300	365	0	365
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	320	350	300	365	0	365
MY Exports (1000 MT)	0	5	0	5	0	5
TY Exports (1000 MT)	0	5	0	5	0	5
Feed and Residual (1000 MT)	320	345	300	360	0	360
FSI Consumption (1000 MT)	0	0	0	0	0	0
Total Consumption (1000 MT)	320	345	300	360	0	360
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	320	350	300	365	0	365
Yield (MT/HA)	0	0	0	0	0	0
(1000 HA) ,(1000 MT) ,(MT/HA)						
MY = Marketing Year, begins with the month listed at the top of each column						
TY = Trade Year, which for Barley begins in October for all countries. TY 2025/2026 = October 2025 - September 2026						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Production

The United Arab Emirates is an arid country with limited water resources and little natural water recharge. Demand for water is mainly met through costly desalination programs and water recycling. Negligible rainfall precludes the production of row crops like barley where the demand is primarily met through import and storage programs. With these severe conditions, UAE has minimal area planted with barley. In the Emirate of Abu Dhabi, the total area planted with barley in 2022/2023 was 3.5 HA and produced around 66 MT. Despite these facts, the government is endeavoring to increase rainfall, grow crops in desert areas that can withstand heat, and invest in agricultural production abroad.

Consumption

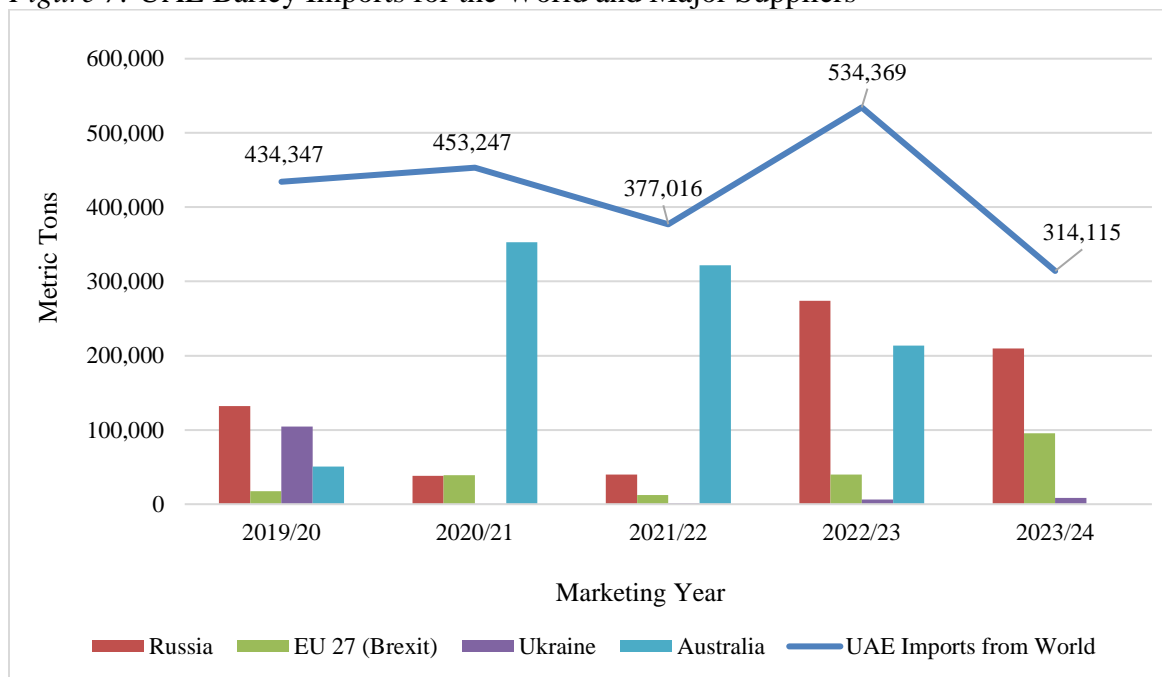
The UAE's MY 2025/25 barley consumption is forecast to remain stable at 360,000 MT. Most of these imports go into feed for the livestock. The UAE consumes around 3 MMT of grain and forage products annually. In addition to corn and barley, the UAE imports hay, soybean meal, and alfalfa to feed around 4.8 million head of cows, camels, sheep, and goats in addition to 44 UAE poultry farms producing meat and eggs for the country and other markets in the GCC.

Trade

Imports

Post forecasts MY 2025/26 barley imports (October 2023–September 2024) to remain stable at 365,000 MT. In MY 2023/24, UAE barley imports from world dropped 41 percent or 220,254 MT at 314,115 MT versus 534,369 MT in previous marketing year (Figure 7).

Figure 7: UAE Barley Imports for the World and Major Suppliers



Source: Trade Data Monitor

In MY 2023/24, Russia was the UAE's major barley supplier with total exports of 209,856 MT, representing 67 percent of the UAE's total barley imports. The EU was the second largest barley supplier to the UAE with total exports of 95,369 MT, an increase of 139 percent or 55,551 MT from the previous marketing year at 39,818 MT. Ukraine was the third largest barley supplier to the UAE with total exports of 8,561 MT, an increase of 38 percent or 2,351 MT from the previous marketing year at 6,210 MT.

The UAE maintains zero import tariff on barley imports from all nations. The UAE is member of the World Trade Organization and has no import restrictions on barley. However, barley imports are subject

to certain regulations to confirm the safety of the product. The UAE has negotiated health certificates for grains with a number of suppliers including the United States. APHIS's Phytosanitary Certificate (PPQ Form 577) is accepted by the UAE. However, U.S. grain suppliers should be aware that all shipments are subject to a 14 days' maximum allowance from the date of inspection to the date of export. Post departure issuance of phytosanitary certificates is generally not allowed.

Exports

Post forecasts UAE exports of barley in MY 2025/26 to remain unchanged at 5,000 MT. In MY 2023/24, the UAE's exports of barley dropped by 26 percent or 592 MT at 1,617 MT compared to 2,209 MT in the previous marketing year. Bahrain was the UAE's major barley importer in MY 2023/24 with total imports of 1,581 MT, a drop of 27 percent or 588 MT from the previous marketing year at 2,169 MT. UAE barley exports are largely imported by local traders and distributors who sell these imported goods to foreign buyers once the product has officially entered the UAE and is recorded as "imports." Other big local importers bring the products into the UAE and then decided to re-export them in search of higher profits or to off-load surplus product.

Re-Exports

According to UAECSC, in MY2023/24, UAE's total barley re-exports were 111,438 MT. Top re-export markets for barley were Kuwait, Qatar, Bahrain, and Oman.

Stocks

Post forecasts zero ending stocks for barley in MY 2024/25. Barley's total supply is anticipated to be consumed domestically.

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Attachments:

No Attachments