Consumer Market
United Arab Emirates

October
2025

CONSUMER MARKET
UNITED ARAB EMIRATES

Ivan Fediakov
Founder | INFOLine | iGlobal

Consumer Market
United Arab Emirates

October
2025

Федяков Иван

основатель INFOLine

Родился 1 сентября 1978 года
в г. Ленинграде.

В 1999 году организовал службу распространения информации по различным каналам, которая стала ведущим аналитическим агентством **INFOLine.**

В 2003 года организовал для сотовой компании "МТС" один из первых в России SMS-сервисов и WAP-портал получения деловой информации.

Принимал участие в более чем 300 исследованиях отраслей и рынков.

Модератор, спикер и участник крупнейших отраслевых конференций и форумов, среди них: *инвестиционный форум ВТБ Капитал, инвестиционный форум Сбербанка CIB, конгресс «INFOLine Retail Russia TOP 100», Петербургский Международный форум ТЭК, Саммит розничной индустрии «Retail Business Russia» и других*.

Организовал и модерировал крупнейшие деловые форумы в РФ, Казахстане, Узбекистане, ОАЭ и другие.

Развиваю сообщество предпринимателей и техфаундеров **iGlobal**

Более 25 лет накапливает и предоставляет отраслевую информацию для более 1000 активных клиентов – компаний, государственных структур и инвесторов в разных регионах.

Учредил и управляю компаниями в **России, Казахстане, Сербии и ОЭА**

Our clients

YANGO

PEPSICO

ASG AL SAIEE GROUP

Nutsy

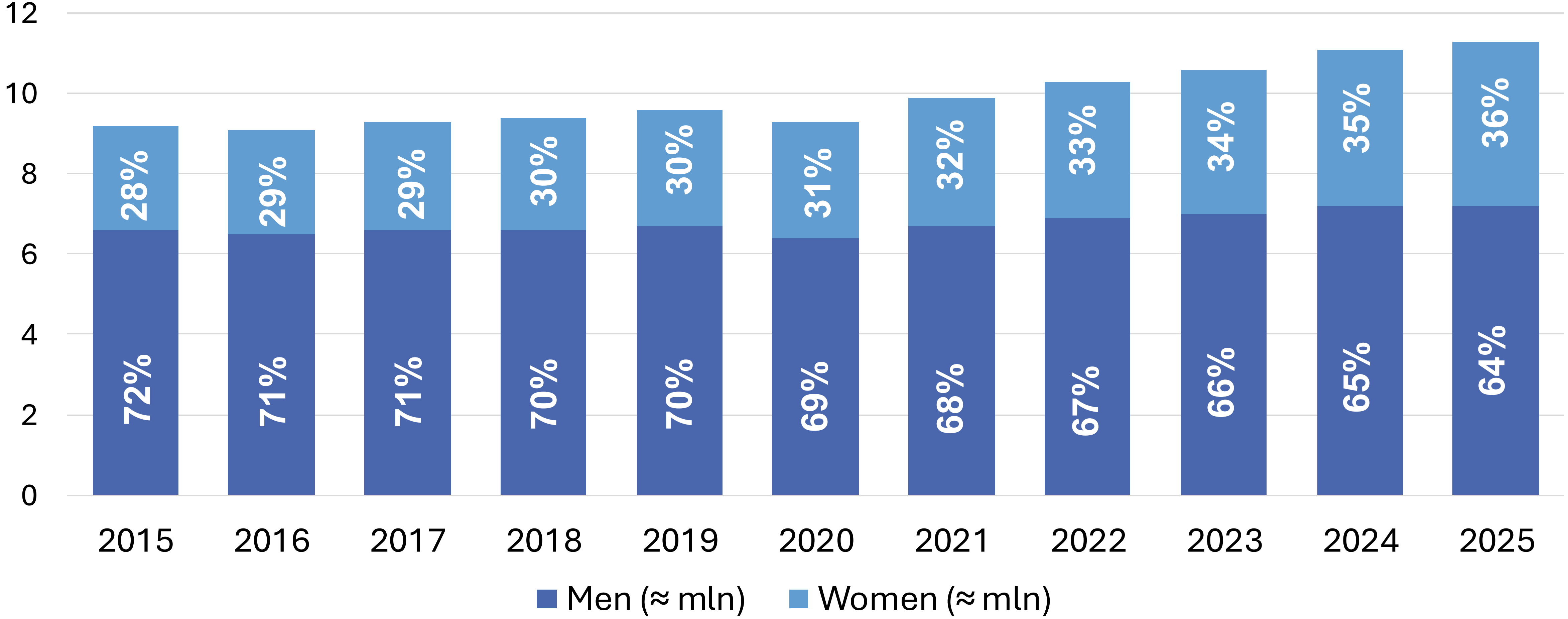
FERRERO

PlanRadar

Consumer Market
United Arab Emirates

October
2025

Population dynamics of the UAE: Men VS Women



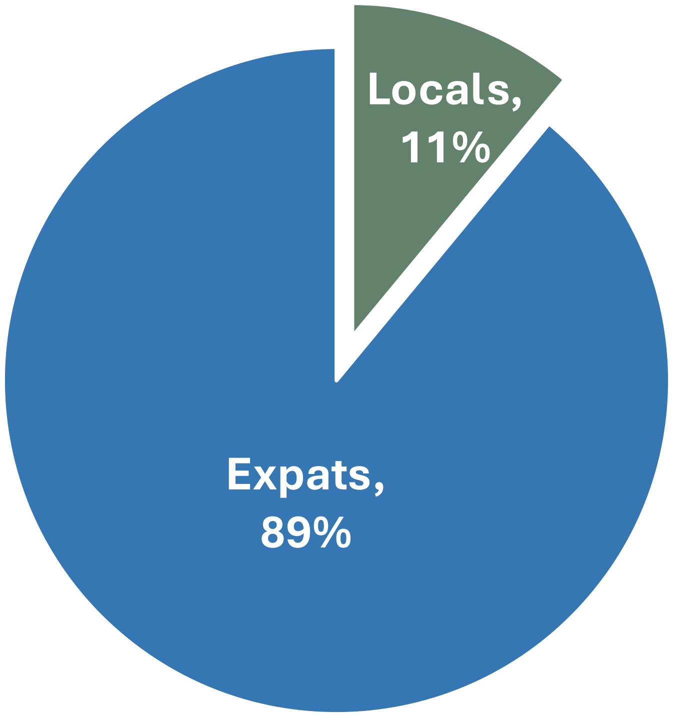
It is important to note the **imbalance in the population structure**. 10 years ago, men made share was 72%.
The **gap is slowly closing**, but even in 2025 men will still be **around 64%** of the population.

Source: Aggregated from Worldometer, Global Media Insight, and official UAE data portals (u.ae, FCSC).

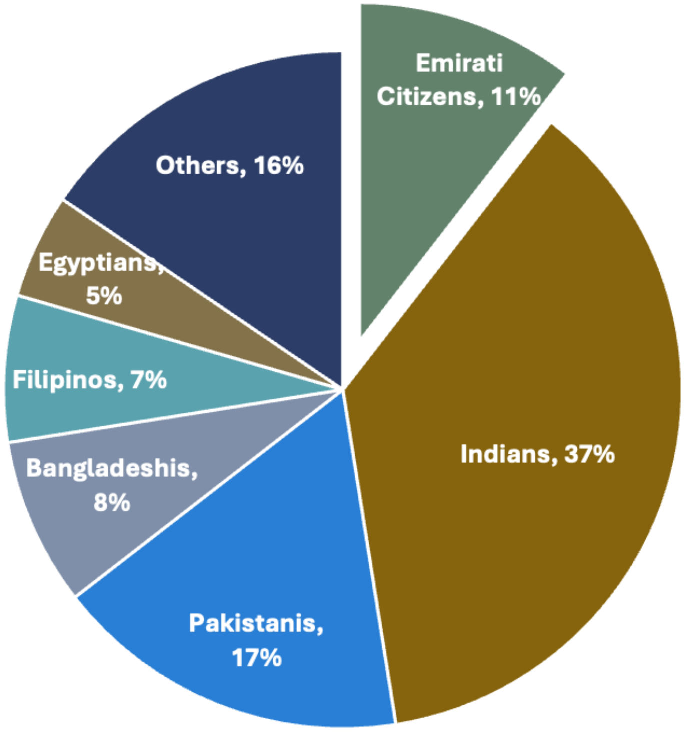
Population structure of the UAE

The reason is the migration **model of the country.** Most newcomers are men of **working age.** Another key feature of the UAE market is **the ethnic structure of the population.**

Only about **11% of people are Emirati citizens**. The big part are expats. Officially, the **Emirates does not make an focus on nationality**, this is the official position of the government.



Source: Rounded estimates based on public demographic data sources (Worldometer, GMI, UAE gov).

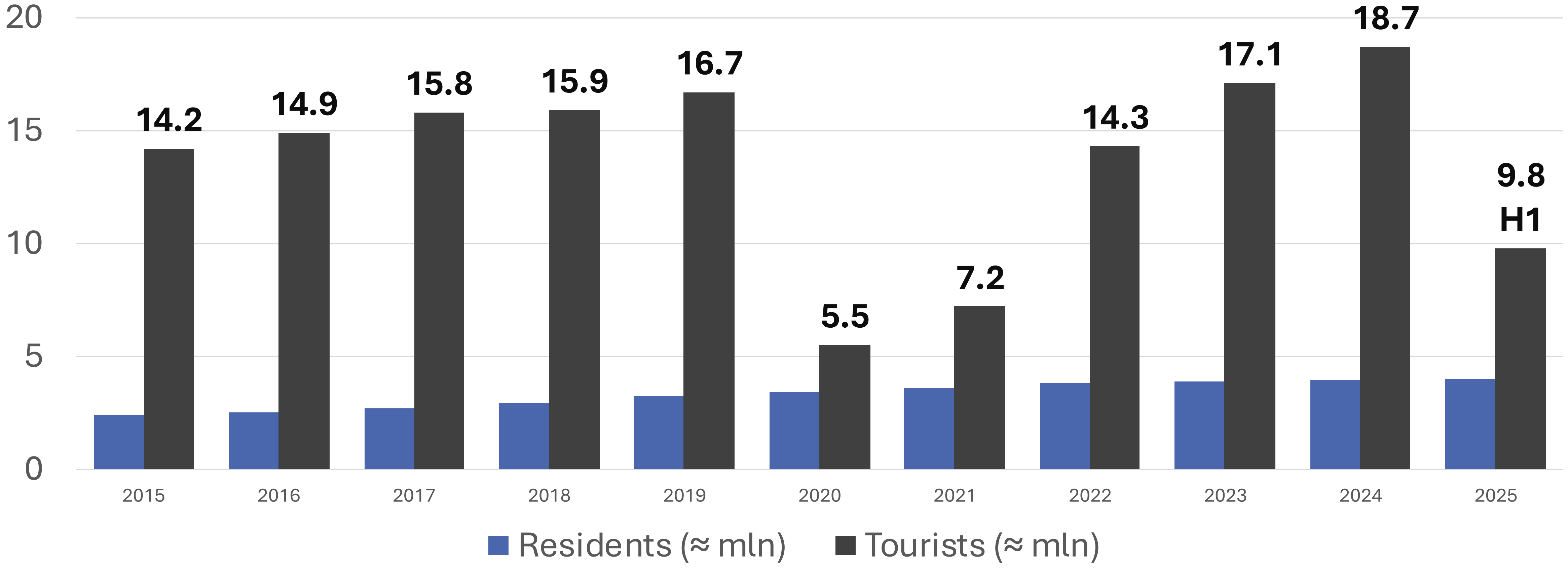


Source: Rounded estimates based on public demographic data sources (Worldometer, GMI, UAE gov).

Consumer Market
United Arab Emirates

October
2025

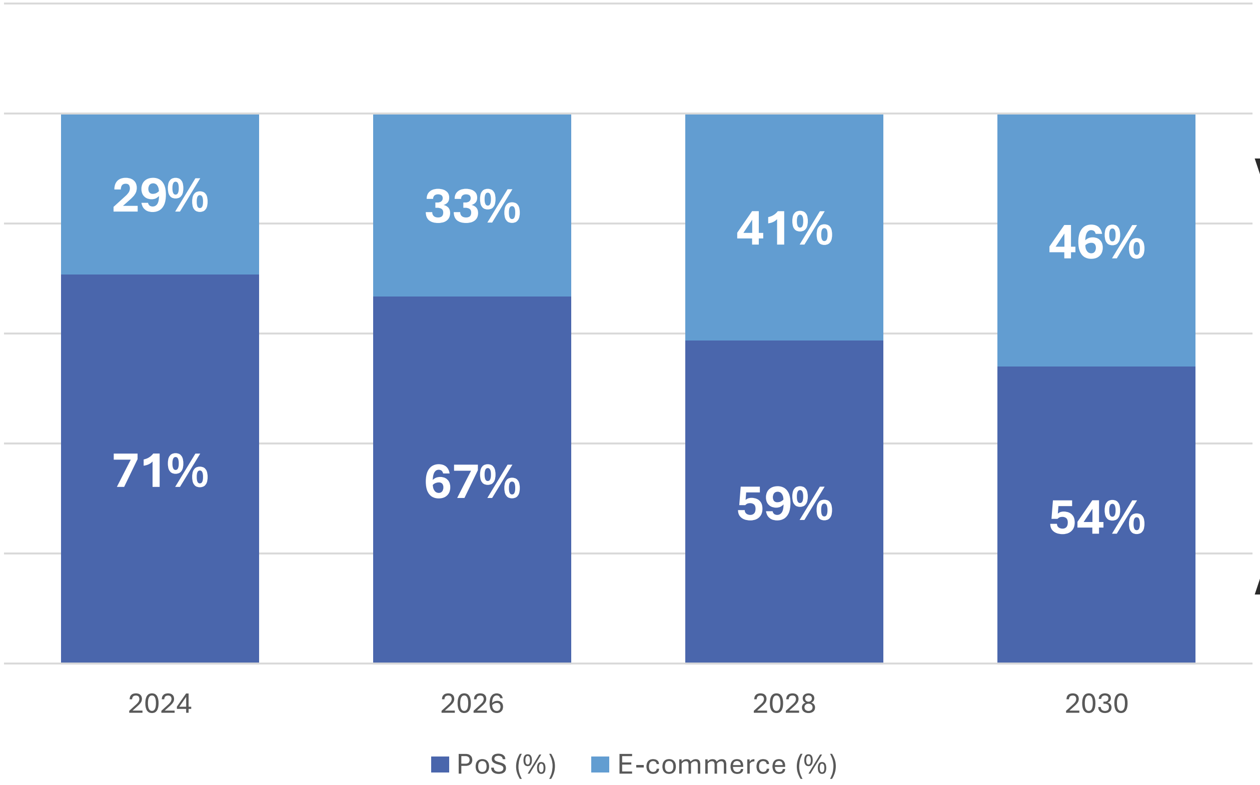
Demographic dynamics in Dubai: Locals vs Tourists



In 2019 we saw a high of touristic flow. The pandemic cut this number **three times.** But by 2023–2024 it recovered and passed **new high visitors**. Every year the tourist flow is **4–5 times bigger** than the number of **residents**. All these factors make the country one of the **most interesting places for the growth of retail** and **retail media.**

Source: Aggregated from Worldometer, Global Media Insight, and official UAE data portals (u.ae, FCSC).

ail Spending Channels: POS vs E-commerce



By 2030 almost 50% of all card transactions in the region will be **online**. Online does not replace offline, it grows in **parallel**. Hypermarkets, supermarkets, corner stores, and malls will still keep the main share of sales.

This shows that retail in UAE is **omnichannel** and e-commerce will continue to grow. Modern trade **will slowly replace** traditional trade. We see this in other countries and our research confirm that.

The future is for those who adapt to omnichannel.

That is why we made a goal to study how modern retail is presented in UAE.

But demographics alone **do not create revenue.** It is important to understand where and how people spend money.

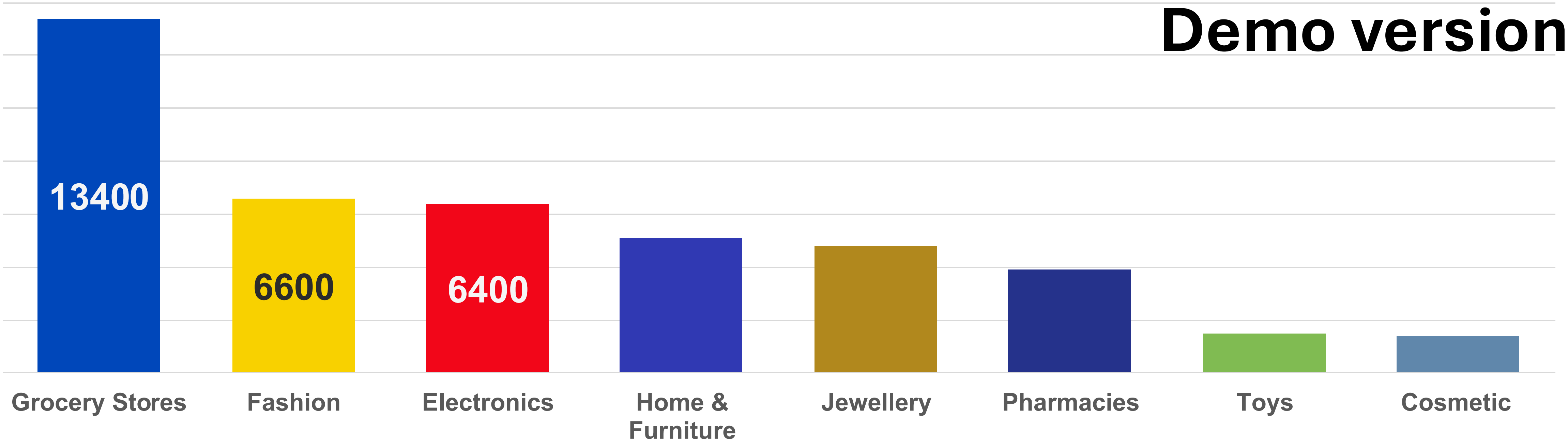
And one more fact **about e-commerce.** Officially there are 40,000 couriers registered in UAE, **which means 1 courier for every 100 people.**

Source: VisaNet Data, source: Visa presentation, 2024

Retail landscape in the UAE: Store count by category

In general, the retail structure in UAE is **not very different from other countries**. We see many formats **of stores and segments.**

Source: Scrapydata.com UAE Retail, 2025



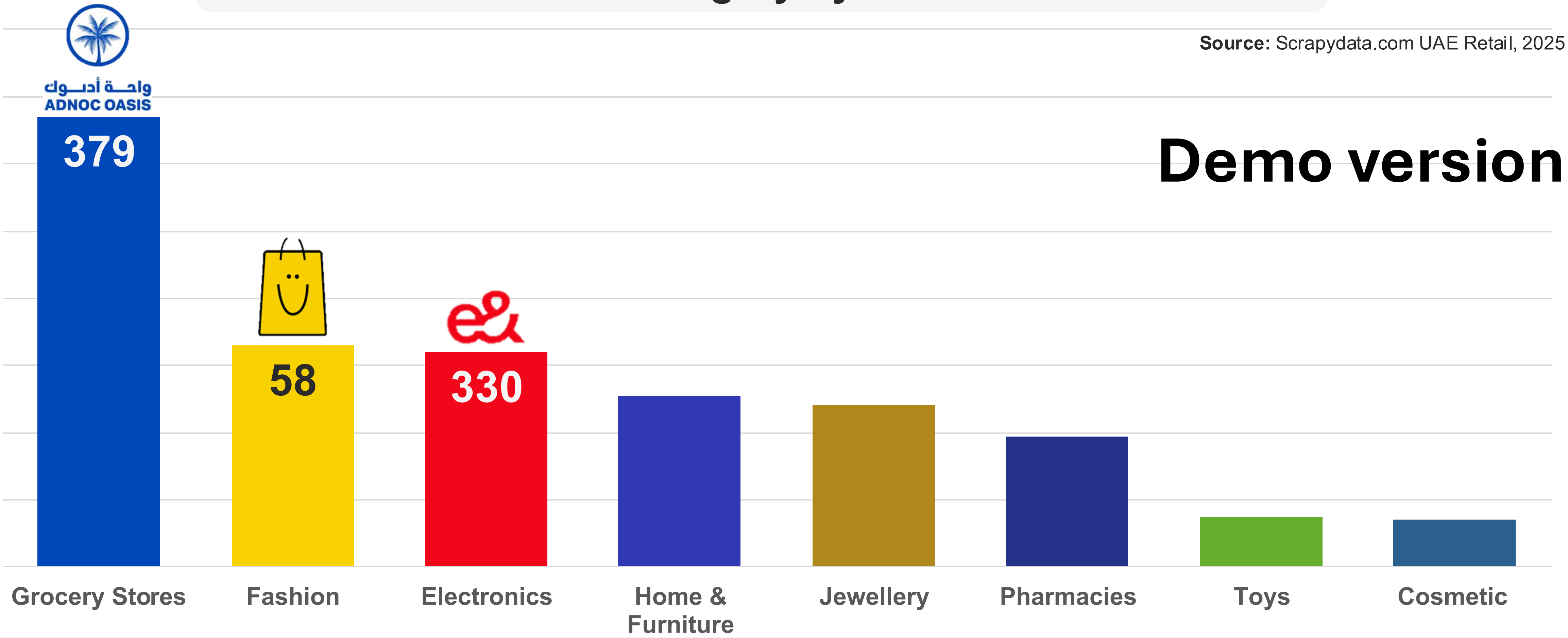
Grocery is the **clear leader**, same as in other countries. Home & Furniture is growing because we have a lot of **active construction in UAE.** But what is surprising is that **Jewellery** is already in **5th place.** After that we see Pharmacies. Cosmetics and Toys **take a smaller share**, but they are still **important niche segments**.
We already saw how many stores work in different categories.
Now let's check who is **leading** inside these segments by number of stores. Because these players set the market standards and define the retail media strategy.

Consumer Market
United Arab Emirates

October
2025

Retail landscape in the UAE: Leader in the category by count of stores

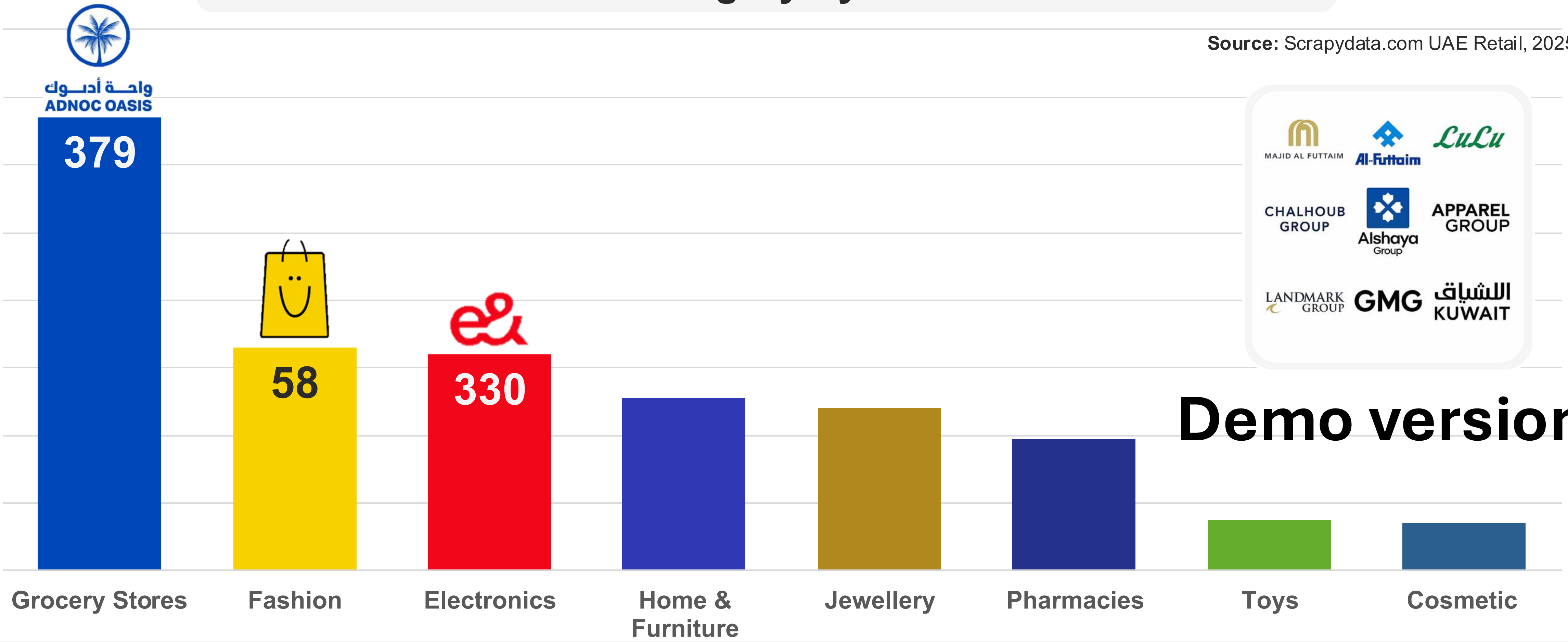
Source: Scrapydata.com UAE Retail, 2025



ADNOC dominates with convenience formats at fuel stations. Their stores similar to neighborhood groceries. Etisalat is the leader in electronics. Of course, their main business is telecom services, but in almost every store they **also sell devices**. In pharmacies, the leader is Life Pharmacy a **huge and fast-growing chain**.

Retail landscape in the UAE:
Leader in the category by count of stores

Source: Scrapydata.com UAE Retail, 2025



Demo version

The leaders are **very different**. From state companies and telecom, to fashion retailers and international brands. And we know that some **holdings own several chains**. But even these holdings **do not control the whole market**. So the picture stays **positive**. We still see a **big variety of brands and formats**.

Consumer Market
United Arab Emirates

October
2025

Retail landscape in the UAE: TOP 250 Retailers

Company				Operating performance of the company					E-commerce			Additional E-commerce									
Country	Company name	Logo	Type of Industry	Annual Revenue (USD)	Number of stores in the country	Store type	Price segment	Holding	Do they have own e-commerce?	E-commerce website (Link)	E-commerce app (Link)	Are they present on any local marketplaces / aggregators?	Amazon	Noon	InstaShop	Talabat	Careem	deliveroo	NowNow	smiles	mrsool
UAE	LIFE Pharmacy		Pharma	$100–250 mln	548	Specialty	mid		webapp	https://www.li	https://apps.ap	Yes	No	No	Yes	Yes	No	No	No	No	No
UAE	Adnoc Distribution (ADNOC		FMCG, Fuel Ret	$500 mln–1 bln	379	Specialty	Mid	ADNOC	no			Yes	No	No	No	Yes	No	Yes	No	No	No
UAE	Etisalat (e&)		Electronics	$50–100 mln	330	Specialty	Mid		webapp	www.etisalat.ae		No	No	No	No	No	No	No	No	No	No
UAE	ENOC (ZOOM)		FMCG, Fuel Ret	$200–500 mln	259	Specialty	Low	ENOC Group	no			Yes	No	No	No	Yes	No	No	No	No	No
UAE	Aster Pharmacy		Pharma	$50–100 mln	238	Specialty	mid		webapp	https://www.m	https://apps.ap	Yes	No	No	Yes	Yes	Yes	Yes	No	Yes	No
UAE	Emarat (FreshPlus)		FMCG, Fuel Ret	$200–500 mln	155	Specialty	Mid	Emirates Gen	no			Yes	No	No	No	Yes	No	No	No	No	No
UAE			Electronics	$50–100 mln	146	Specialty	Mid					No	No	No	No	No	No	No	No	No	No
UAE			FMCG	$200–500 mln	129	Big-Box & Hy	Low					Yes	No	No	Yes	Yes	No	No	No	No	No
UAE			FMCG	$500 mln–1 bln	118	Big-Box & Hy	Low					Yes	Yes	No	No	Yes	No	No	No	No	No
UAE			Pharma	$50–100 mln	109	Specialty	mid					Yes	No	No	Yes	Yes	No	Yes	Yes	No	No
UAE			FMCG	$200–500 mln	105	Big-Box & Hype	Low					Yes	No	No	Yes	Yes	No	No	No	Yes	No
UAE			FMCG	$200–500 mln	101	Specialty	Low					Yes	No	No	Yes	Yes	Yes	Yes	No	No	No
UAE			Pharma	$50–100 mln	99	Specialty	mid					Yes	No	No	Yes	Yes	Yes	Yes	No	No	No
UAE			Sport equipmen	$100–250 mln	91	Specialty	mid					Yes	No	Yes	Yes	No	Yes	Yes	Yes	No	No
UAE			Jewelry	$250–500 mln	89	Specialty	high					Yes	Yes	Yes	No	No	No	No	No	No	No
UAE			FMCG	$200–500 mln	89	Big-Box & Hy	Low					Yes	No	No	Yes	Yes	No	No	No	No	No
UAE			Pharma	$50–100 mln	79	Specialty	mid					Yes	No	No	Yes	Yes	Yes	Yes	Yes	No	No

We already looked at population, sales channels, categories and leaders by number of stores.

But this **is not enough** if we really want to understand the market.

That is why we made the first systematic analysis in the **UAE. The ranking of the TOP-250 biggest retail chains**. We collected data on estimated offline revenue, number of stores, store formats, price segments, e-commerce activity, and marketplaces activity.

Now I will show you the results of this research. And you will see why the **retail market of UAE is very special.**

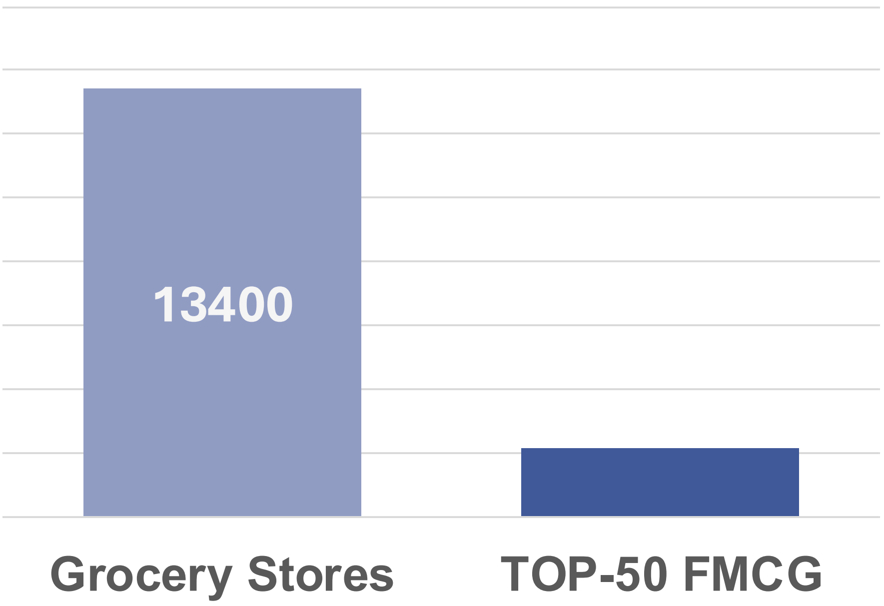
Source: Scrapydata.com UAE Retail, 2025

Consumer Market
United Arab Emirates

October
2025

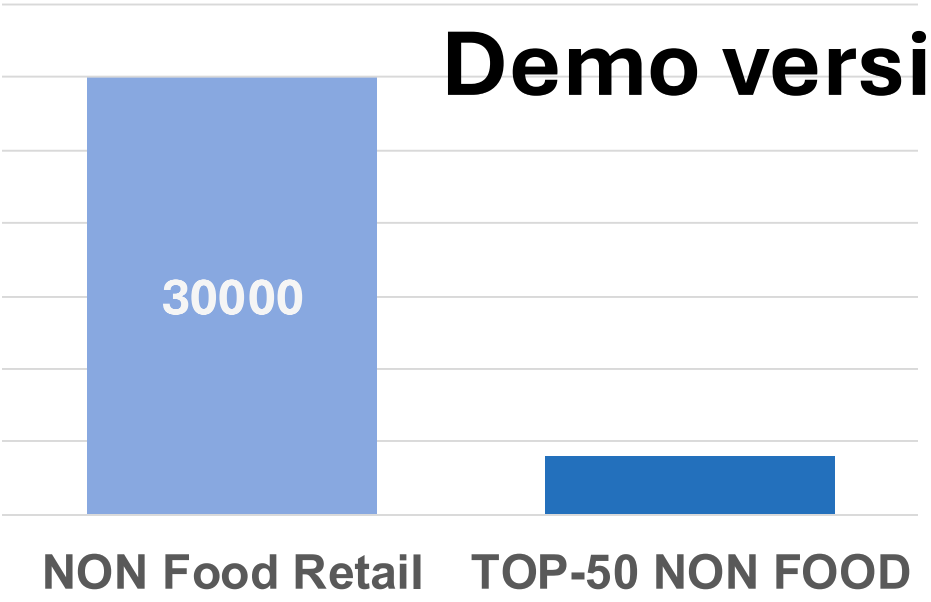
Retail landscape in the UAE: TOP Retailers

When we collected the data and looked at the market from the **top**, we saw that it is very unusual. **Unlike Europe or the US**, where a few chains control **50–70% of turnover.** In the Emirates the situation is completely different. Even the **TOP-50 retailers** take only a small share. The rest is spread between thousands of small independent stores.



The share of the **TOP 50** is approximately **16%**, which means that **84%** of sales are distributed among small independent shops

Demo version



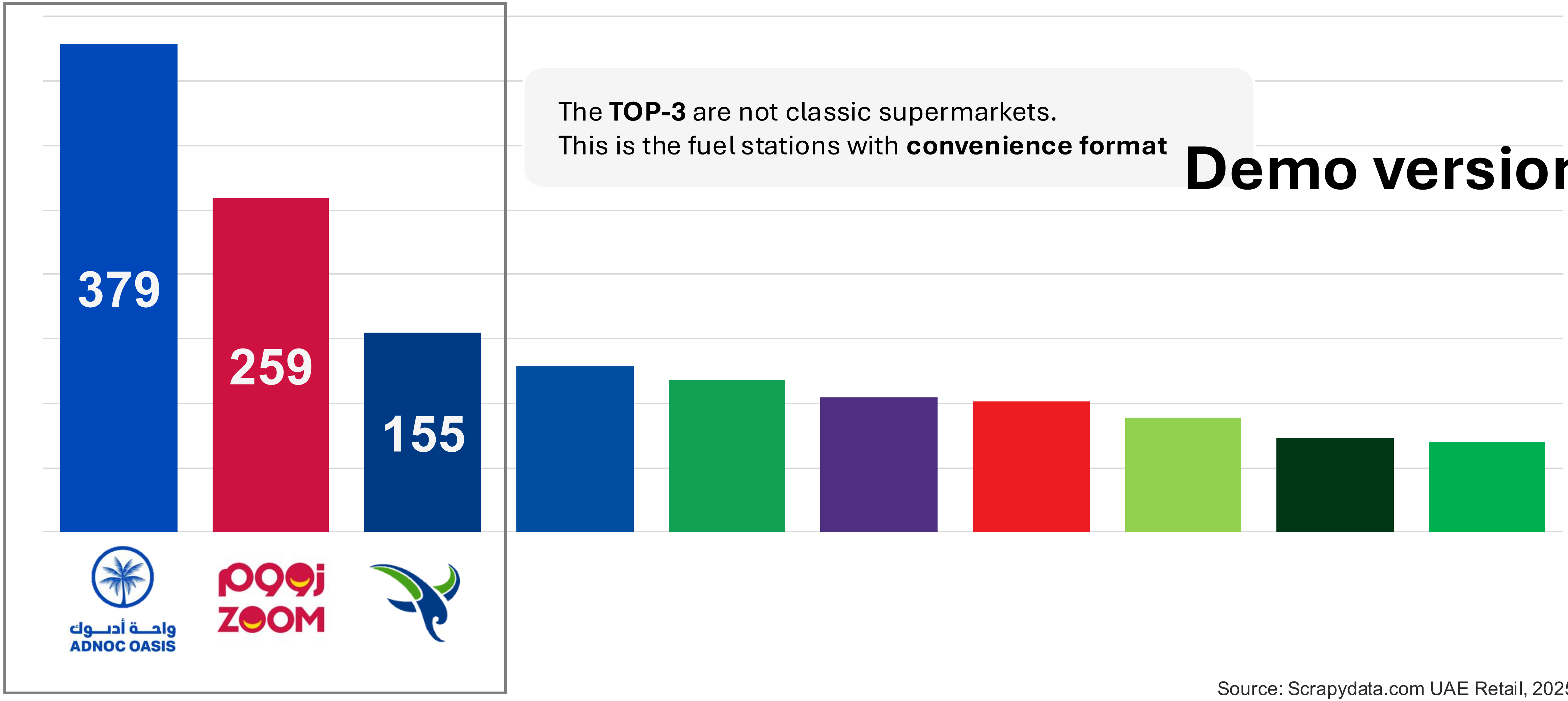
~30,000 shops, with only **~13.5%** (≈4,040) in the TOP-50 → the market is even **more fragmented than FMCG**

The market is very **fragmented**, and this allows modern retail to grow **not only by organic expansion.** But also by replacing **less successful** independent players in the coming years.

Consumer Market
United Arab Emirates

October
2025

TOP-10 FMCG Retailers in the UAE: 2025



The **TOP-3** are not classic supermarkets.
This is the fuel stations with **convenience format**

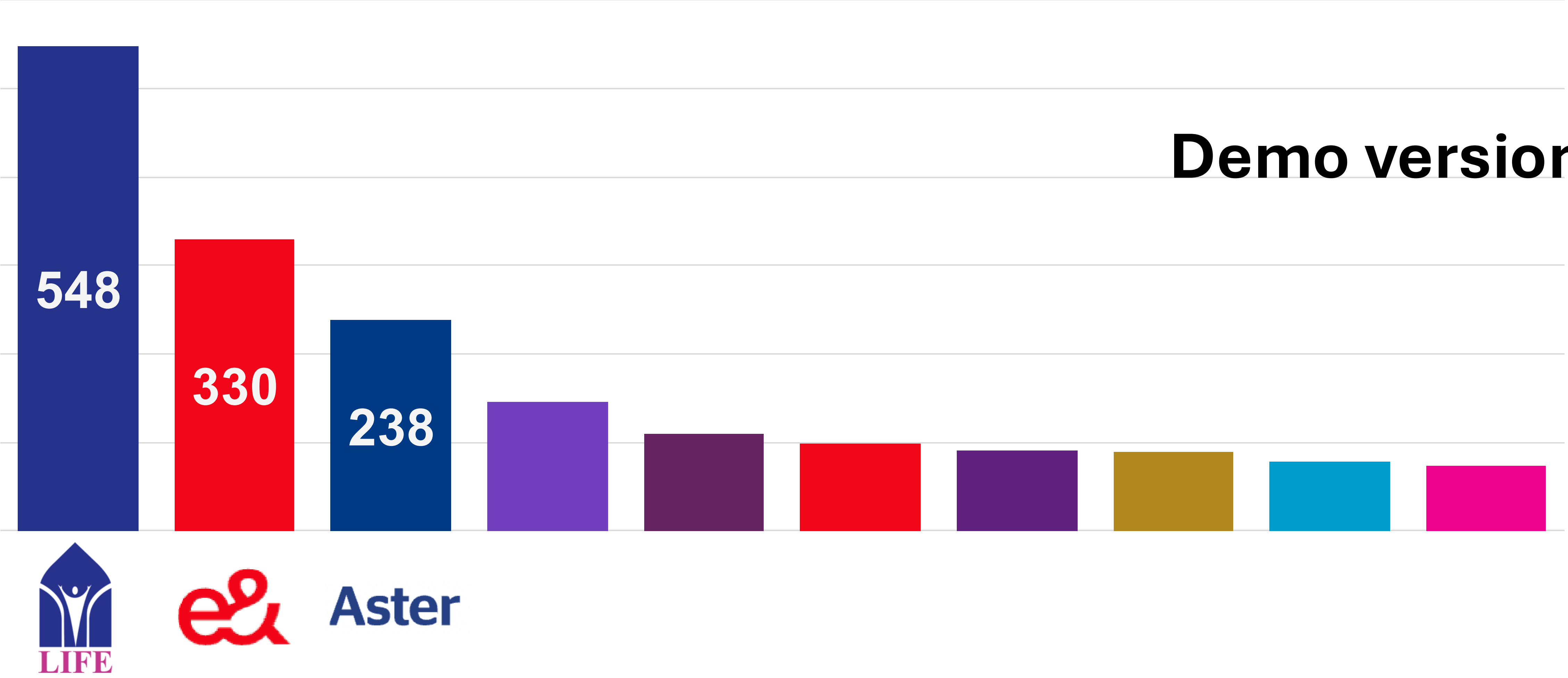
Demo version

Source: Scrapydata.com UAE Retail, 2025

Consumer Market
United Arab Emirates

October
2025

TOP-10 NON FOOD Retailers in the UAE: 2025



Demo version

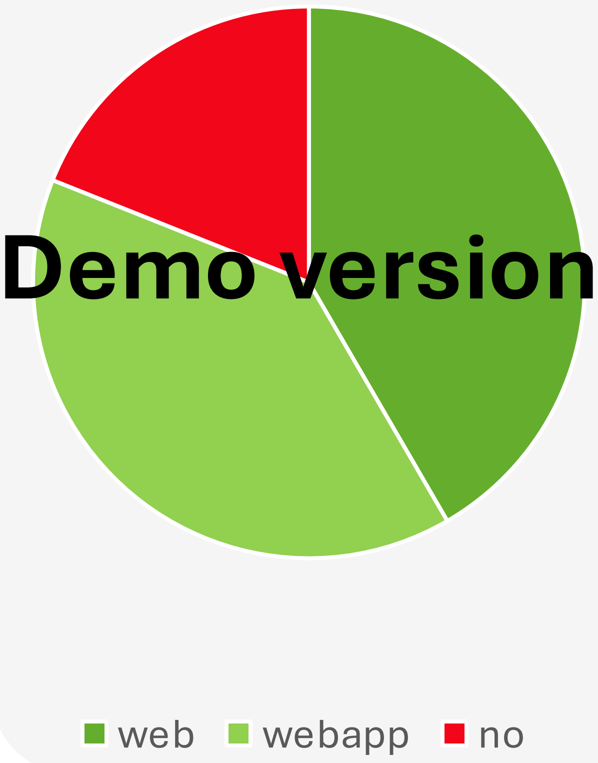
Source: Scrapydata.com UAE Retail, 2025

Consumer Market
United Arab Emirates

October
2025

Top 250 retailers in the Emirates
Do they have own E-Commerce?

Company				Operating performance of the company					
Country	Company name	Logo	Type of Industry	Annual Revenue (USD)	Number of stores in the country	Store type	Price segment	Holding	Do they have own e-commerce?
UAE	LIFE Pharmacy		Pharma	$100–250 mln	548	Specialty	mid		webapp
UAE	Adnoc Distribution (ADNOC		FMCG, Fuel Ret	$500 mln–1 bln	379	Specialty	Mid	ADNOC	no
UAE	Etisalat (e&)		Electronics	$50–100 mln	330	Specialty	Mid		webapp
UAE	ENOC (ZOOM)		FMCG, Fuel Ret	$200–500 mln	259	Specialty	Low	ENOC Group	no
UAE	Aster Pharmacy		Pharma	$50–100 mln	238	Specialty	mid		webapp
UAE	Emarat (FreshPlus)		FMCG, Fuel Ret	$200–500 mln	155	Specialty	Mid	Emirates Gen	no
UAE	du (EITC)		Electronics	$50–100 mln	146	Specialty	Mid		webapp
UAE	Carrefour		FMCG	$200–500 mln	129	Big-Box & Hy	Low	Majid Al Futta	webapp
UAE	LuLu		FMCG	$500 mln–1 bln	118	Big-Box & Hy	Low	LuLu Group I	webapp
UAE	Medicina Pharmacy		Pharma	$50–100 mln	109	Specialty	mid		webapp
UAE	ADCOOP		FMCG	$200–500 mln	105	Big-Box & Hype	Low	Mair Group	webapp
UAE	VIVA Supermarket		FMCG	$200–500 mln	101	Specialty	Low	Landmark Gr	no
UAE	BinSina Pharmacy		Pharma	$50–100 mln	99	Specialty	mid		webapp



And our research showed that most retailers in the UAE already moved online

--% have their own e-commerce website, and almost **--** of them also have a **mobile app**

But still, **almost --%** of the biggest players stay fully offline

Giants like **ADNOC** or **VIVA** work only through physical stores without their own online channel.

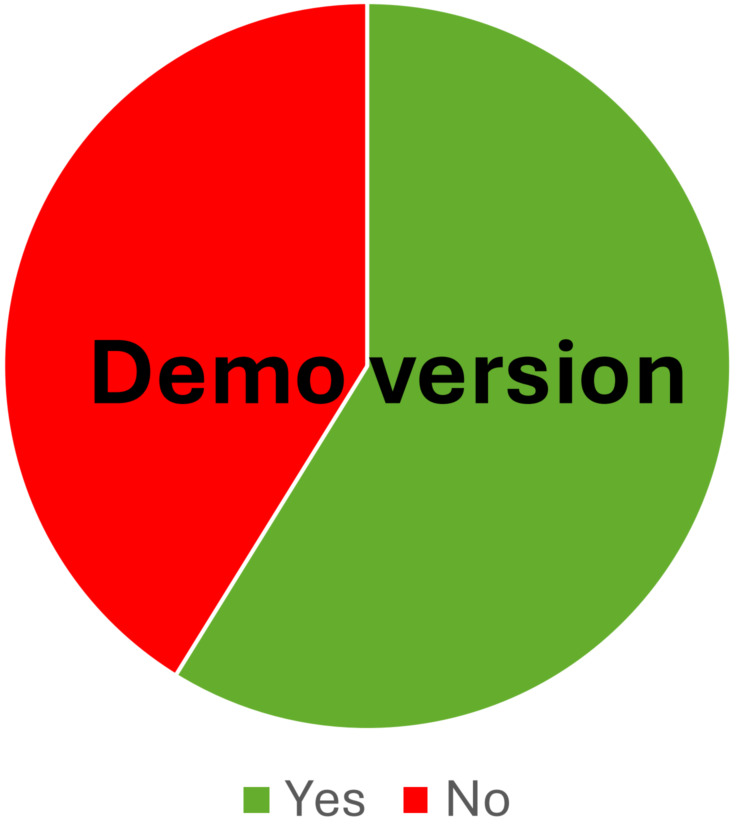
This opens opportunities for **marketplaces and aggregators**, which take the digital reach of the customer.

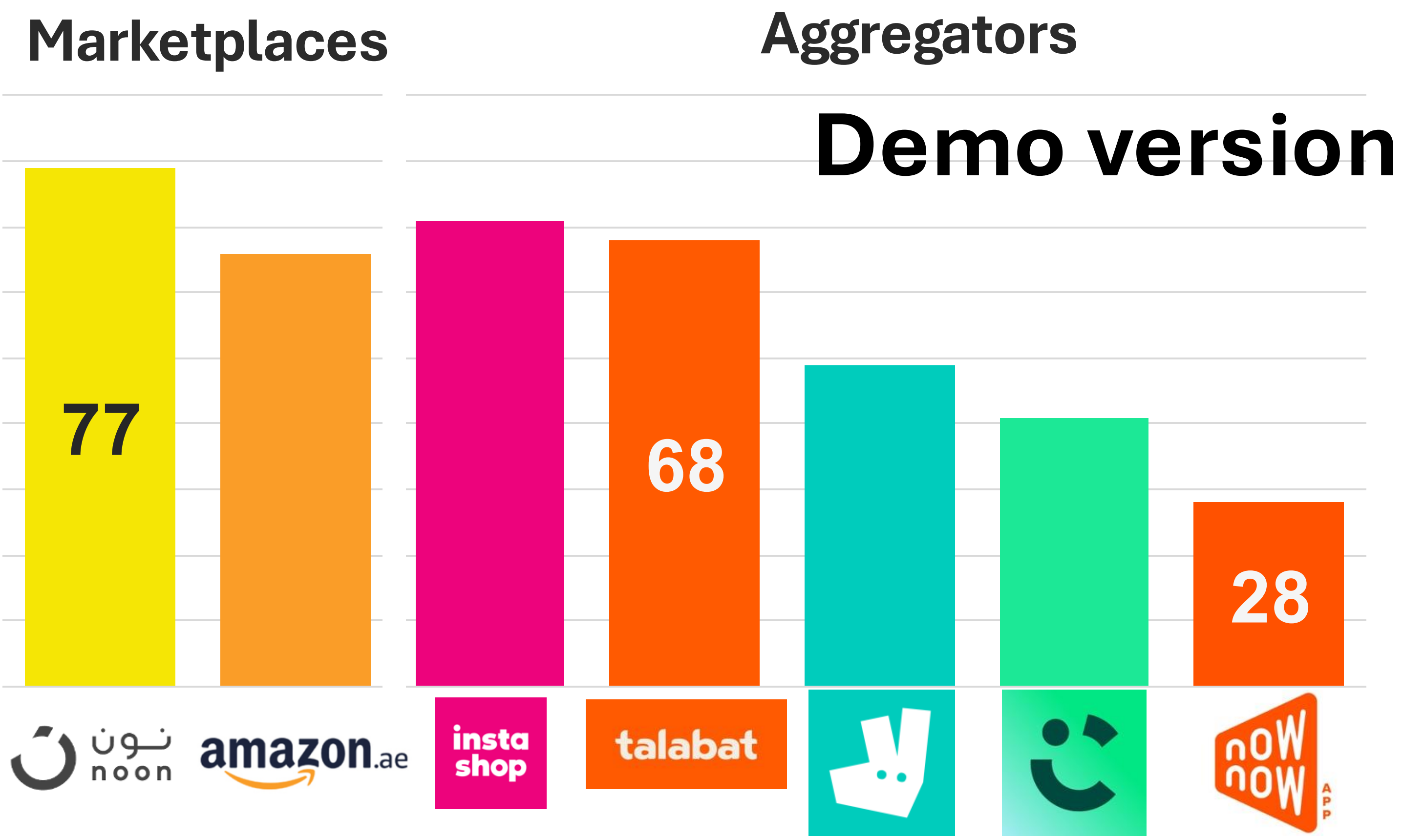
Source: Scrapydata.com UAE Retail, 2025

Consumer Market
United Arab Emirates

October
2025

Top 250 retailers in the Emirates
Are they present on any local marketplaces / aggregators?





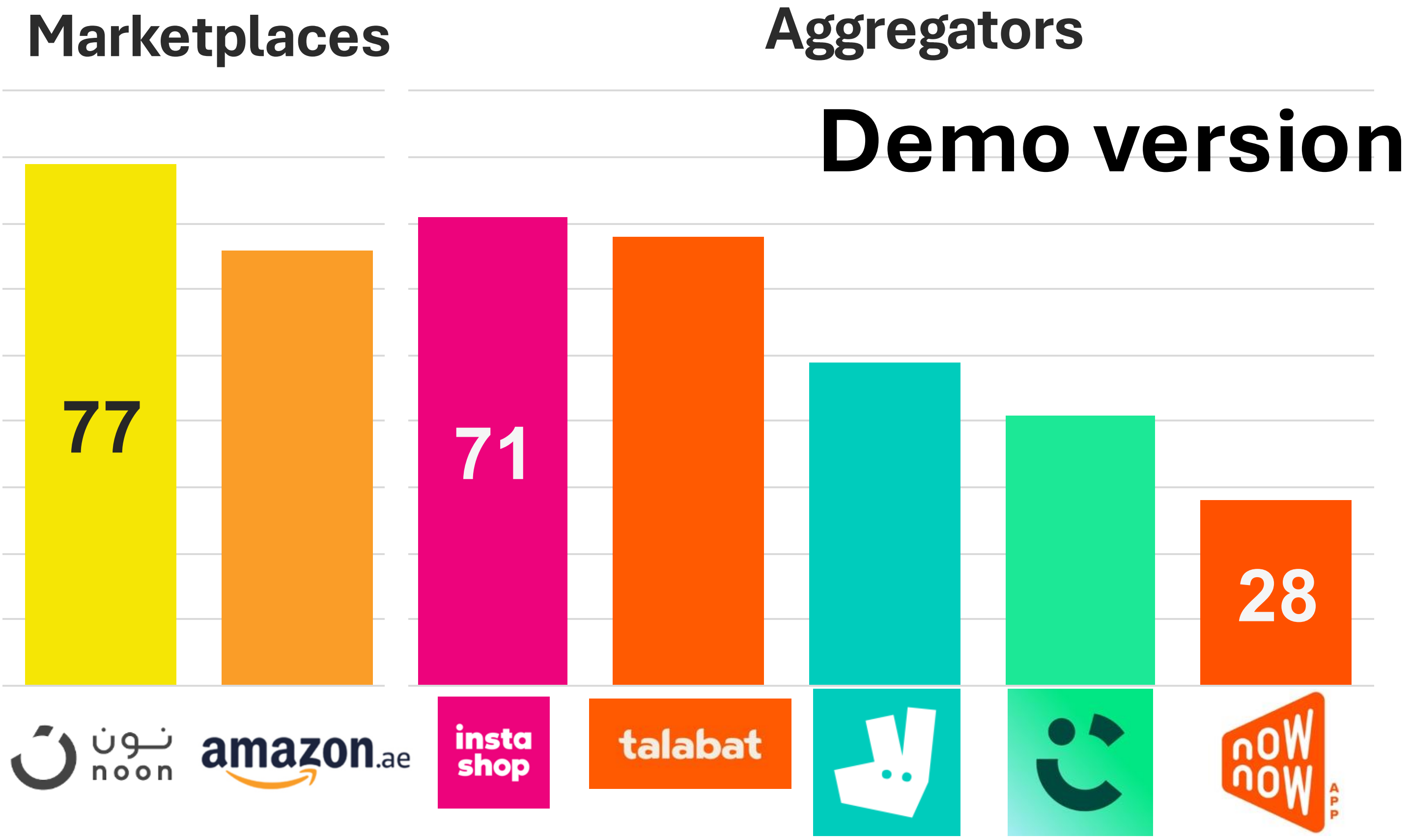
Source: Scrapydata.com UAE Retail, 2025

Top 250 retailers in the Emirates
Are they present on any local marketplaces / aggregators?

This list does not end here. We know that the aggregator **Bolt** is planning to enter the market, and also our client **Yango** is active in this space.

This means the market will develop even faster, with strong competition between aggregators and marketplaces. Both for customers and for partners, retailers and sellers.

This gives big optimism for the future dynamics and development of the UAE consumer market.



Source: Scrapydata.com UAE Retail, 2025

Consumer Market
United Arab Emirates

October
2025

Федяков Иван

основатель INFOLine

Родился 1 сентября 1978 года
в г. Ленинграде.

Scan the QR code to download the full presentation and insights