

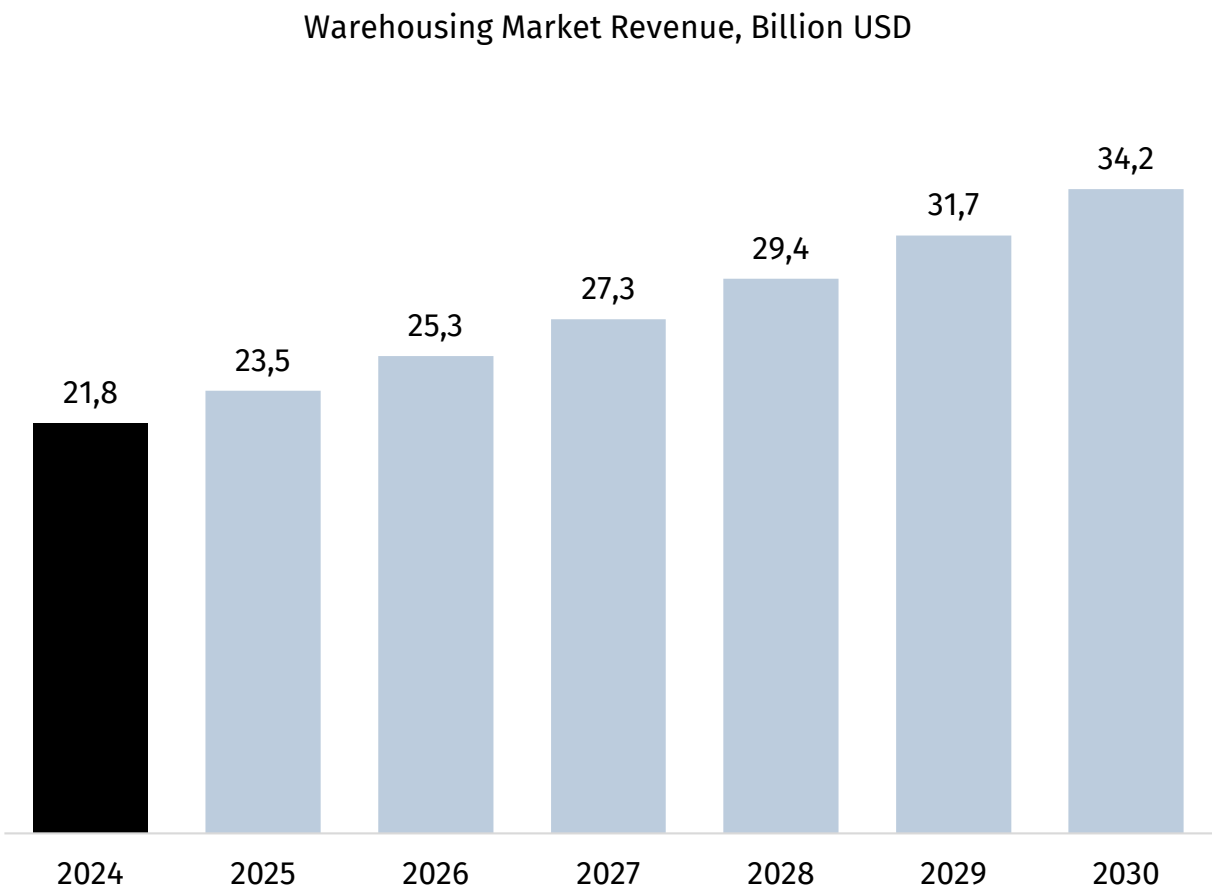
Warehouse Market Study

United Arab Emirates

July 2025



WAREHOUSE MARKET OVERVIEW



Sources: Grand View Research

Warehouses in the UAE are primarily located near free economic zones, which ensures rapid delivery and efficient cross-border movement of goods. The total warehouse space in the UAE is estimated at approximately 30 million square meters.

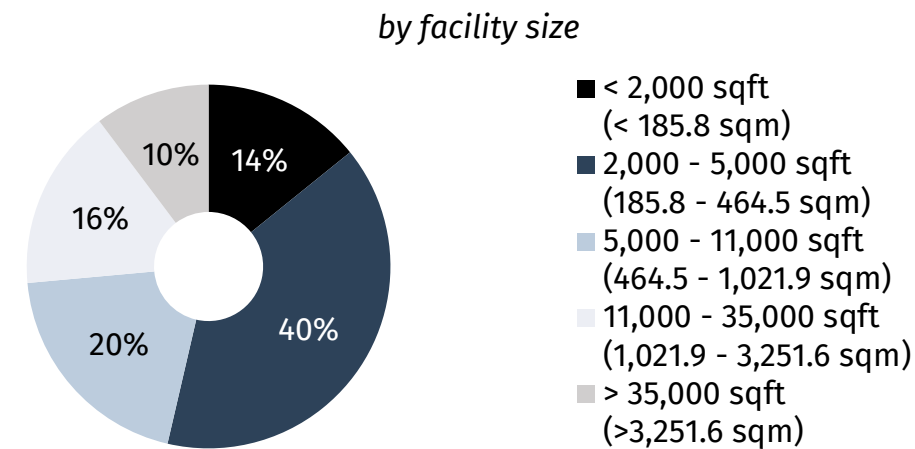
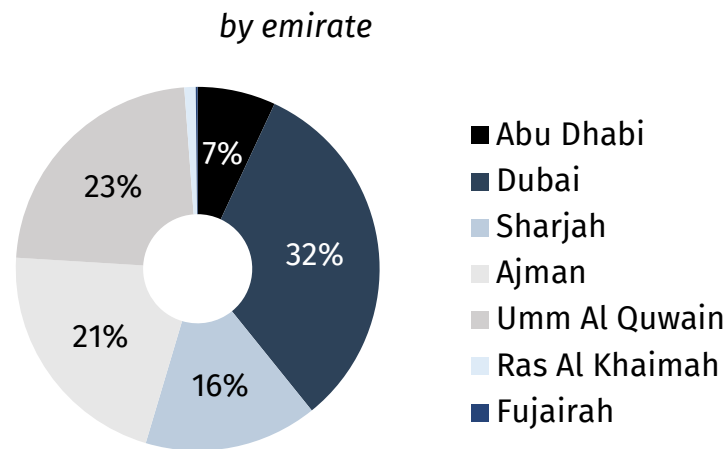
Industry experts note that the vacancy rate for Class A properties in Dubai remains exceedingly low—around 3%—highlighting a shortage of high-quality facilities.

The logistics and warehousing sector in the UAE is expected to experience steady growth, driven by factors such as the country’s strategic geographical location, ongoing railway construction, continuous infrastructure development, increased foreign investment, and the rapid expansion of e-commerce.

According to estimates by Grand View Research, revenues in the UAE warehousing market are projected to grow by 7.8% annually from 2025 to 2030 and are expected to reach USD 34.2 billion by 2030.

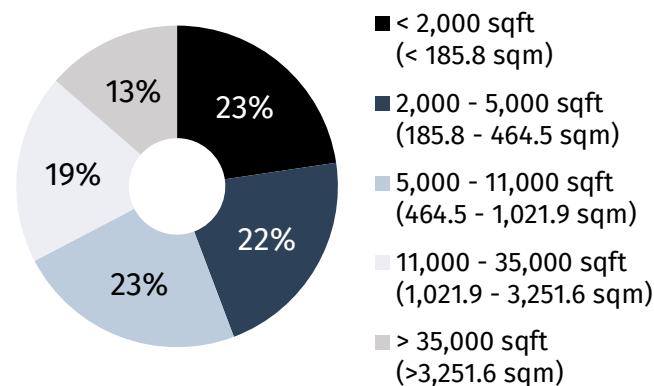
WAREHOUSE MARKET SUPPLY

Supply Breakdown of the UAE Warehouse Market 3,558 supply offers



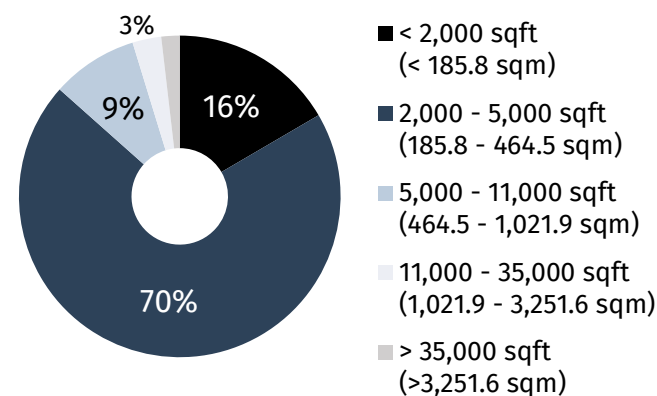
1,148 supply offers

Dubai



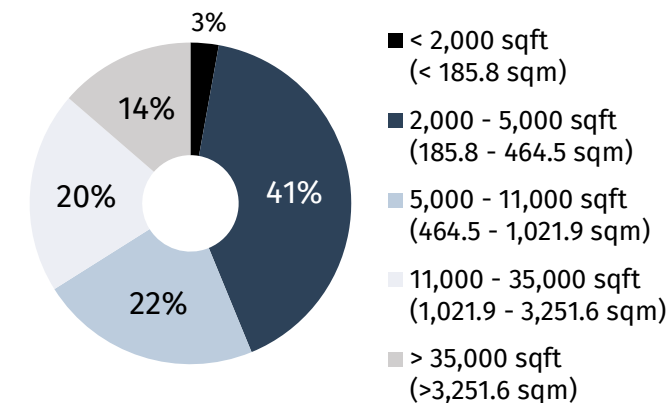
760 supply offers

Ajman



813 supply offers

Umm Al Quwain



WAREHOUSE MARKET PLAYERS

Companies Established in the UAE



Foreign Companies in the UAE Market



WAREHOUSE MARKET PLAYERS



DP World

One of the world's leading operators of marine terminals and logistics services, headquartered in Dubai. The company specializes in port management, free trade zones, and comprehensive logistics solutions, facilitating global trade flows.

Location: Dubai

Location: Dubai



Emirates SkyCargo

The air cargo division of Emirates Airlines and one of the world's top players in air freight transportation. Emirates SkyCargo provides comprehensive solutions for a wide range of cargo—from standard commercial shipments to specialized transport, including pharmaceuticals, perishables, hazardous materials, live animals, valuables, and oversized items. The company plays a critical role in maintaining Dubai's status as a key global transport hub, connecting East and West.

Location: Dubai



Aramex

An international logistics and transportation company specializing in courier services, freight transportation, and integrated logistics solutions. Founded in 1982 in Jordan, it became the first Arab company listed on the London Stock Exchange. Aramex is headquartered in Dubai.

Location: Dubai

WAREHOUSE MARKET PLAYERS



DHL Supply Chain

A provider of contract logistics and end-to-end supply chain solutions in the UAE, part of the global DHL Supply Chain network under Deutsche Post DHL Group. The company specializes in managing warehousing operations, distribution, transportation, and digital optimization of logistics processes across various industries.

Location: Dubai



Al-Futtaim Logistics

The logistics division of Al-Futtaim Group, delivering comprehensive solutions in freight transportation, warehousing, and supply chain management within the UAE and beyond.

Location: Dubai



Kuehne+Nagel

A leading global logistics provider offering a full range of services in the UAE, including sea, air, and land transportation, as well as contract logistics. The company is part of Kuehne + Nagel International AG, founded in 1890 and operating in over 100 countries worldwide.

Location: Abu Dhabi, Dubai

WAREHOUSE MARKET PLAYERS



Abu Dhabi Ports

A key operator of seaports and industrial zones in the UAE, playing a strategic role in advancing trade, logistics, and industry in the Emirate of Abu Dhabi. The company manages some of the most modern port infrastructure in the region, supporting economic diversification.

Location: Abu Dhabi



Agility

One of the world's largest logistics companies, holding a leading position in the Middle East, including the UAE. Founded in 1979 in Kuwait, the company expanded its operations to Dubai and other emirates, becoming a key player in regional and international logistics.

Location: Dubai



Hellmann Worldwide Logistics

A German international logistics company with a history spanning over 150 years, operating in the UAE since the 1990s. The company specializes in providing integrated logistics solutions across a wide range of industries.

Location: Dubai, Abu Dhabi, Sharjah

WAREHOUSE MARKET PLAYERS

| Company | Year Established | Country of Incorporation | Number of Storage Facilities in the UAE | Storage area in the UAE | Storage Facility Type |
|----------------------|------------------|--------------------------|---|-------------------------|---|
| DP World | 2005 | UAE | 10+ | ~3 million sqm | Port-Centric Warehouses and Logistics Zones |
| Emirates SkyCargo | 1985 | UAE | 4 (airport hubs) | ~200 thousand sqm | Air Cargo Terminals |
| Aramex | 1982 | UAE | 15+ | ~1 million sqm | Regional Distribution Centers |
| DHL Supply Chain | 1969 | Germany | 8 | ~800 thousand sqm | Multi-Client Warehouses |
| Al-Futtaim logistics | 1930 | UAE | 12 | ~1.2 million sqm | Trade and Logistics Complexes |
| Kuehne Nagel | 1890 | Germany | 5 | ~600 thousand sqm | Specialized Warehouses (Chemicals, Pharmaceuticals) |
| Abu Dhabi Ports | 2006 | UAE | 7 | ~2 million sqm | Industrial Zones (KIZAD) |
| Agility | 1979 | Kuwait | 6 | ~700 thousand sqm | Military and Commercial Warehouses |
| Hellmann Worldwide | 1871 | Germany | 4 | ~400 thousand sqm | Small and Medium B2B Warehouses |

UPCOMING PROJECTS



KEZAD Group, the largest operator of integrated and purpose-built economic zones, announced the construction of warehouse facilities totaling over 250,000 square meters with an investment of AED 621 million (USD 169 million) to bring additional capacity of pre-built industrial and logistics assets online by the end of 2025. This will increase KEZAD's total warehousing capacity by 43%.

The project includes the development of more than 97,500 square meters of leasable space in the Khalifa Industrial Zone (KEZAD Al Ma'mourah A & B) and over 153,000 square meters of leasable space in ICAD 3 (KEZAD Musaffah).

The completed facilities will comprise logistics and distribution warehouses, cold storage units, light industrial properties, and showrooms of varying sizes and specifications.



DP World confirmed that construction has begun in Dubai on Bharat Mart—a wholesale and retail trading platform spanning 2.7 million square feet (250,000 square meters). Bharat Mart will serve as a major distribution center for Indian companies.

The first phase, covering 1.3 million square feet (120,000 square meters), is expected to open by the end of 2026 in the Jebel Ali Free Zone (Jafza), just 11 km from Jebel Ali Port. It will feature 1,500 showrooms and over 700,000 square feet (65,000 square meters) of Class A warehouse space, light industrial facilities, office spaces, and conference halls.



Aldar, one of Abu Dhabi's largest developers, is investing USD 272 million to expand its logistics business in the UAE amid rising demand for warehouse space.

As part of its investment projects, Aldar acquired seven central logistics hubs along with adjacent land within Dubai Investments Park. The company also purchased assets from Seven Seas Steel Industries.

Aldar will build 233,000 square meters of new Class A logistics facilities in the UAE, including 200,000 square meters of total leasable space that will house rental units and Dubai logistics parks. The company plans to complete an expansion of 33,000 square meters to the existing ADBH logistics complex in Abu Dhabi, which is fully leased to Etihad, Mubadala, and Twofour54.

TRENDS IN THE WAREHOUSING MARKET

- ① The UAE's strategy to build a diversified, sustainable, and dynamic economy drives the country's focus on expanding warehouse space. Growth in manufacturing activity, booming international trade, and rising domestic consumption serve as the primary market drivers.
- ② The manufacturing sector accounts for over a quarter of the warehouse real estate market. E-commerce—boosted by a post-pandemic surge—also plays an increasingly important role, notably by driving demand for last-mile warehousing. Next in line are the logistics and food & beverage manufacturing sectors, both of which stand to benefit from expanded capacity as rapid delivery to customers and businesses becomes increasingly vital.
- ③ As supply of high-quality Class A warehouse space falls short of demand, rental rates continue to rise. Dubai's market saw a notable 13% year-on-year increase in average rents in 2024. Abu Dhabi is also experiencing growth, though more moderately, with rents up 5% over the year.
- ④ The UAE's Foreign Direct Investment Law now permits up to 100% foreign ownership in more than 122 economic activities across 13 sectors—including transportation and storage, agriculture, space, manufacturing, renewable energy, hospitality, and food service. This legislation further supports the expansion of the warehouse real estate market.



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UAE, Dubai
DSO-IFZA, IFZA Properties, Dubai Silicon Oasis



+971 55 417 8477



sales@aser.ae

