



UAE 2031: Where strategy becomes opportunity

A practical guide to the sectors,
markets and policy signals shaping
the UAE's next phase of growth

Executive summary

The United Arab Emirates is undergoing one of the more compelling rewrites of a national economic story anywhere in the world. The country has set out what it intends to become by 2031 and 2071 and has moved decisively into the execution phase of that ambition.

For a company operating in the UAE, or considering it, the practical question has shifted. The issue now is which parts of that ambition are open for business today, which are likely to open next, and whether the organisation is ready to move when they do. The question is no longer whether the UAE's ambitions will translate into activity but where companies should position themselves to participate.

This paper maps the architecture behind the headlines and sorts it into three tiers of readiness.

The scale of the shift is visible in the data

The Federal Competitiveness and Statistics Centre reported real GDP growth of 6.2% in 2025 to AED 1.9 trillion, with non-oil GDP growing faster at 6.8% to AED 1.5 trillion, close to 79% of national output. Non-oil foreign trade rose 26% to surpass AED 3.8 trillion. Foreign direct investment reached a fourth consecutive record at AED 177.3 billion, placing the UAE ninth globally for inbound FDI and second worldwide by greenfield project count for a third consecutive year.

THE ARCHITECTURE IS LAYERED, AND EACH LAYER SENDS A DIFFERENT SIGNAL

Federal visions establish national direction, regulatory frameworks and macroeconomic targets. Emirate-level strategies translate that direction into commercial models built around each emirate's own strengths. Sector strategies provide the execution layer, including the funding mechanisms, procurement rules and regulatory sandboxes that companies interact with directly. Opportunity often sits at the intersection of these layers, which is why companies tracking only one of them risk seeing only part of the picture.

In November 2025, the Minister of Cabinet Affairs reported that 67% of 'We the UAE 2031's' targets had been achieved with six years remaining.



The three tiers of readiness

Tier 1: Immediate Opportunity

Tier 2: Emerging and Escalating

Tier 3: Structural and Long Horizon



*Advanced manufacturing
and industrial localisation.*

*Applied AI and the
digital economy.*

*Global connectivity
and trade platforms.*



*Talent and lifestyle
ecosystems.*

*Energy transition and
deep decarbonisation.*



*Deep science, space
and frontier technology
commercialisation.*

*Food and agricultural
security.*



Three themes already combine committed capital, a live access mechanism and functioning regulation. Advanced manufacturing and industrial localisation are the clearest of the three, with the 'National In-Country Value' programme operating as an active procurement rule and a published offtake pipeline of AED 180 billion over the coming decade covering more than 5,000 products targeted for localisation. Applied AI and the digital economy combines a funded federal target with operating emirate-level sandboxes and demonstrated inbound capital. Global connectivity and trade platforms can already be measured against outcomes delivered rather than targets pending.



This horizon covers priorities funded on timescales measured in decades. Alongside the deep science, space and frontier technology ambitions set out under 'UAE Centennial 2071' sits food and agricultural security, where the 'National Food Security Strategy 2051' addresses a dependency on imported food of around 90% of national consumption. Its horizon is long, though corporate procurement is already directing contracts toward domestic suppliers, which gives companies in food production, agricultural technology and cold chain logistics a reason to engage well before 2051.



Two themes combine strong ambition and significant committed capital while the wider ecosystem continues to take shape. In talent and lifestyle ecosystems, the access mechanism has matured faster than the retention infrastructure around it. In energy transition and deep decarbonisation, near-term commitments are anchored by identifiable corporate capacity, while the longer-term commercial thesis depends on markets and frameworks still being built. Both merit active positioning today.



Access to the UAE's strategy documents is close to universal, so information alone offers little advantage. What differentiates outcomes is the organisational discipline to act on it. The closing sections set out four steps, namely scoping where the company is genuinely exposed, identifying which opportunities are material in both directions, prioritising them against horizon and financial impact the organisation capable of acting on them. They close with a table of the institutions, mechanisms and deadlines that govern access to each theme.

The UAE opportunity in numbers

The United Arab Emirates has moved from aspirational vision into practical implementation, investment deployment and capability building. For any business operating in the country, that shift is the real story of this moment.

Beneath the headline growth figures, the sectoral breakdown shows where that expansion is concentrated. Construction led sectoral growth at 11.1%, followed by finance and insurance at 10.4%, real estate at 7.9% and transport and storage at 7.8%. Trade contributed the largest share of output at 16.9%, ahead of finance and insurance at 13.2%, construction at 12.9% and manufacturing at 12.8%. Financial services, advanced manufacturing, technology, construction and global trade now sit among the primary drivers of national expansion.

Foreign capital is moving in the same direction. UNCTAD's 'World Investment Report 2026' recorded 48.24 billion USD of FDI inflows for 2025, ranking the UAE ninth globally and first across the wider Middle East. The Ministry of Investment's 'UAE

Foreign Direct Investment Report 2026' records those inflows at AED 177.3 billion, a 6% year-on-year increase and a fourth consecutive record year. Total FDI stock reached AED 1.17 trillion, while the UAE ranked second worldwide by greenfield project count for a third consecutive year, with 1,562 projects announced.

Structural legislative modernisation has helped anchor that capital, including full foreign onshore business ownership, modern insolvency law, long-term Golden Visas, a standardised corporate tax regime and expanding Comprehensive Economic Partnership Agreements (CEPA). Non-oil foreign trade rose 26% in 2025 to pass 1 trillion USD.

None of this is accidental. It is the visible output of a connected portfolio of national and emirate-level strategies, backed by published targets, state capital and regulatory frameworks. Few governments publish this much of their economic playbook so openly. The combination of clearly defined targets, implementation programmes and sector strategies gives businesses an unusually transparent view of where government attention, investment and policy support are likely to concentrate over the coming decade.

The wider environment in which this is happening

The opportunity landscape also needs to be read against the global environment in which this transformation is taking place. Artificial intelligence is reshaping productivity and business models across industries. Climate change is changing expectations around energy, resources and resilience. Geopolitical uncertainty is influencing supply chains and investment decisions. At the same time, countries are competing more aggressively for technology capabilities, skilled talent and strategic industries. These structural shifts are changing how economies create value and form the wider context in which every national strategy now has to be understood.

Regional volatility in the first half of 2026 tested those conditions across the Gulf. Following its July 2026 staff visit, the IMF assessed that sound economic fundamentals, advanced preparedness and timely, targeted government measures had contained the overall impact in the UAE.

It also noted that strong balance sheets across federal and emirate-level governments, government-related entities and the private sector helped absorb the disruption. Infrastructure planned well in advance did much of the work, with the Habshan to Fujairah pipeline routing export volumes to the Gulf of Oman. The lesson for companies is relatively simple. The organisations that held their commercial position through that period were those that had already built an alternative route, supplier or market before they needed one.

The policy response pointed in the same direction. At Make it in the Emirates 2026, held in Abu Dhabi in May, the Ministry of Industry and Advanced Technology convened an Industrial Resilience and Supply Chain Continuity Forum and announced a package of measures built explicitly around supply chain continuity, industrial self-sufficiency and support for companies operating through volatility.

Why national strategy matters commercially here



National strategies in the UAE carry operational mandates that change the commercial terms on which companies operate.

Local value creation is incentivised directly. The National In-Country Value programme influences government procurement, and that of leading national companies, in favour of businesses that manufacture, hire and build research and development capacity locally. Its stated aim is to redirect half of government procurement and tender spending into the national economy by 2031.

Frontier regulation also arrives early. In artificial intelligence, commercial space, clean hydrogen and digital assets, the UAE is deliberately building early regulatory clarity, allowing companies to commercialise technologies faster than in many legacy markets. Capturing that advantage requires companies to have the internal expertise in place to engage with regulators that are themselves moving quickly.

Sustainability also acts as an industrial catalyst. Initiatives such as ‘Net Zero by 2050’ and the ‘National Hydrogen Strategy’ have made sustainability a driver of infrastructure investment and industrial differentiation, with commercial consequences that extend well beyond compliance reporting.

Workforce composition carries a published deadline, with mainland companies above a defined size required to reach a set level of Emirati representation in skilled roles by the end of 2026. The mechanism is set out in the talent section below.

This is also a moment shaped by a competitive regional context. The UAE operates alongside Saudi Arabia’s ‘Vision 2030’, which is being pursued with immense capital and scale. The UAE’s distinct advantage lies in its institutional and regulatory maturity, supported by a decade-long head start in legal predictability, talent attraction and trade integration.

For an SME already established on the ground, the task ahead is to sequence its internal roadmap against a procurement and regulatory calendar that is already moving. For an international company considering entry or expansion, the practical question is where its capabilities intersect with the parts of the opportunity map furthest along in execution. In both cases, the main constraint is organisational readiness, meaning the internal capacity to interpret a fast-moving strategic environment, decide what matters to the business, and act while the opportunity remains open.

What this means for you		
OPPORTUNITY	RISK	ACTION
The UAE publishes more of its economic direction than almost any comparable market, which allows a company to plan against stated government priorities rather than guess at them.	The volume and pace of published strategy can outrun a company’s internal capacity to read it, prioritise within it and act in time.	Identify which two or three published strategies actually govern your commercial terms in the UAE, assign internal ownership for tracking each one, and put ‘Make it in the Emirates’, held annually in Abu Dhabi in early May, in the calendar of whoever owns industrial policy internally.

From vision to execution

The UAE’s future ambitions are not contained in a single economic plan or government document.

They are built through a layered system of interconnected visions, programmes and sector-specific initiatives that collectively define how the country intends to compete over the coming decades. Understanding how those layers connect matters commercially because the opportunity landscape sits at the intersection layers.

Federal ambitions

At the federal level, the country’s long-term development trajectory is shaped by two defining visions.

‘UAE Centennial 2071’, launched in 2017, represents the country’s longest-term ambition and aims to establish the foundations required for future

competitiveness by the centenary of the federation. It emphasises advanced education, innovation, entrepreneurship, technology, research capabilities and the development of a knowledge-based economy. It also reflects a willingness to invest in capabilities that may take decades to mature.

STRATEGY	LAUNCHED	CORE PUBLISHED TARGET	WHAT IT SIGNALS TO A COMPANY
UAE Centennial 2071	2017	Foundations for long-term competitiveness through education, innovation, research and a knowledge economy	Where capability building will be funded over decades, relevant to scenario work more than near-term planning
We the UAE 2031	November 2022	Four pillars, with 67% of targets reported achieved by November 2025 and non-oil GDP share targeted at 80% by 2031	The clearest available measure of national delivery pace
National Investment Strategy 2031	Unveiled November 2024, approved March 2025	Annual FDI inflows from AED 112bn in 2023 to AED 240bn, stock from AED 800bn to AED 2.2tn, five priority sectors	The five sectors where inbound investment is actively courted
Operation 300bn	2021	Industrial contribution to GDP from AED 133bn to AED 300bn by 2031, R&D from AED 21bn to AED 57bn, support for 13,500 industrial SMEs	The funding envelope behind industrial localisation
UAE Digital Economy Strategy	April 2022	Digital economy contribution to GDP from 9.7% to 19.4% within ten years, across more than 30 initiatives	The pace at which digital procurement and regulation will move
National In-Country Value Programme	Nationalised 2021	Redirect half of government procurement and tender spending into the national economy by 2031	The most direct commercial mechanism in the architecture, since ICV standing affects pipeline access

‘We the UAE 2031’, launched in November 2022, translates that long-term ambition into a framework for the current decade. Built around four pillars, namely Forward Society, Forward Economy, Forward Diplomacy and Forward Ecosystem, it focuses on economic competitiveness, quality of life, future industries and the UAE’s global position. In November 2025, Minister of Cabinet Affairs Mohammad Al Gergawi reported that 67% of the vision’s targets had been achieved with six years remaining, and that the non-oil sector’s contribution to GDP had reached 77.5% in the first half of 2025 against an 80% target for 2031.

A range of federal strategies supports these broader visions and focuses on specific economic priorities.

Two of these deserve particular attention because they are frequently conflated. The ‘National Investment Strategy 2031’ governs inbound foreign investment across five priority sectors, namely industry, financial services, transport and logistics, renewable energy and water, and telecommunications and IT. ‘Operation 300bn’ governs domestic industrial capability. With 2025 inflows at AED 177.3 billion and stock at AED 1.17 trillion, the country is roughly three quarters of the way to its 2031 annual inflow target.

Further national strategies covering artificial intelligence, space, food security, water security and clean energy show that future growth is increasingly being built around capabilities as much as around traditional sectors.

What this means for you		
OPPORTUNITY	RISK	ACTION
Federal strategies name the sectors where inbound investment, industrial support and regulatory attention are concentrated, and publish the targets against which delivery is measured.	A federal target indicates direction. It does not by itself create a commercial access point, which sits at emirate and sector level.	Map your core activity against the five ‘National Investment Strategy’ priority sectors and against ‘Operation 300bn’, establish which of the two governs your route to market, and check your current Emiratization position against the December 2026 threshold.

Emirate-level strategies

While federal strategies establish the national baseline, the individual emirates provide distinct commercial pathways, each building on its own economic strengths within a broader complementary ecosystem.

EMIRATE	STRATEGIC MODEL	ANCHOR STRATEGY AND PUBLISHED TARGETS	PRACTICAL ENTRY POINTS
Dubai	Trade integration, headquarters density, digital innovation, capital flow	Dubai Economic Agenda D33, January 2023, AED 32tn cumulative economic activity by 2033 and a top three global city position, through 100 transformational projects	Sandbox Dubai, Universal Blueprint for Artificial Intelligence, Robotics and Automation Programme, Quality of Life Strategy 2033
Abu Dhabi	Sovereign capital, energy expertise, large-scale industrial infrastructure	Abu Dhabi Industrial Strategy, June 2022, AED 10bn investment, manufacturing from AED 83.5bn in 2021 to AED 172bn by 2031, non-oil exports up 143% to AED 178.8bn, 13,600 skilled jobs	Six transformational programmes, SAVI hub in Masdar City, ADNOC procurement pipeline and ICV certification
Sharjah	Research, higher education, culture, circular economy	Anchored by Sharjah Research, Technology and Innovation Park and BEEAH Group	R&D partnerships, waste management and circular economy supply chains
Ras Al Khaimah	Heavy manufacturing, mining, energy efficiency, high-growth tourism	RAK Strategy 2040	RAKEZ free zones, energy efficiency retrofit work, tourism development
Fujairah	Maritime logistics, bunkering and energy storage outside the Strait of Hormuz	Fujairah 2040 Plan	Port and bunkering services, alternative routing and storage capacity
Umm Al Quwain	Sustainable coastal development	UAQ Sustainable Blue Economy Strategy 2031	Lower-cost market entry, blue economy activity
Ajman	Agile SME incubation	Ajman Vision 2030	SME licensing

Dubai focuses on global trade integration, corporate headquarters density, digital innovation and capital flow. The Dubai Economic Agenda D33, launched in January 2023, targets AED 32 trillion in cumulative economic activity by 2033, a doubling of the emirate’s economy, and a position among the world’s top three cities for living, working and investing. It is being pursued through 100 transformational projects, supported by the ‘Dubai Universal Blueprint for Artificial

Intelligence’, the ‘Robotics and Automation Programme’, ‘Sandbox Dubai’ and the ‘Dubai Quality of Life Strategy 2033’. Abu Dhabi draws on sovereign wealth strength, energy expertise and large-scale infrastructure capital to build technology-driven industry. Guided by the ‘Abu Dhabi Economic Vision 2030’, the emirate operationalises its industrial transformation through the ‘Abu Dhabi Industrial Strategy’,

launched in June 2022. An AED 10 billion government investment across six transformational programmes targets more than doubling the manufacturing sector from AED 83.5 billion in 2021 to AED 172 billion by 2031, creating 13,600 skilled jobs and raising non-oil exports by 143% to AED 178.8 billion. Cluster developments such as the ‘Smart and Autonomous Vehicle Industries’ hub in Masdar City illustrate how the emirate is building complete physical ecosystems around selected future industries. The Abu Dhabi Investment Office is the emirate’s entry point for industrial siting, having concluded arrangements with twelve companies at ‘Make it in the Emirates 2026’, covering eight new manufacturing hubs and four expansion projects.

The other emirates offer specialised platforms that connect into the broader national network. Sharjah focuses on research, higher education, culture and circular economy leadership, anchored by the ‘Sharjah Research, Technology and Innovation Park’ and BEEAH Group. Ras Al Khaimah combines heavy manufacturing, mining and energy efficiency under ‘RAK Strategy 2040’ with high-growth tourism and specialised investment free zones. Fujairah uses its coastal position outside the Strait of Hormuz to operate as a deep-sea bunkering, energy storage and maritime logistics corridor, a role whose strategic value became particularly visible during 2026. Umm Al Quwain and Ajman focus on sustainable coastal development and agile SME incubation through the ‘UAQ Sustainable Blue Economy Strategy 2031’ and ‘Ajman Vision 2030’.

What this means for you		
OPPORTUNITY	RISK	ACTION
The seven emirates compete on different terms, which means the right location for a given activity is rarely the most visible one.	Licensing, incentives and procurement rules differ by emirate and by free zone, and mainland status carries Emiratisation obligations that most free zone entities do not, so a decision made for one entity does not transfer automatically to another.	Test your current or intended location against at least one alternative emirate before your next licensing renewal or expansion decision.

How the UAE growth agenda fits together

The strength of the UAE’s approach lies in the way these strategies reinforce one another. Federal strategies establish national ambition and provide the wider foundations through regulation, international agreements and investment frameworks.

Emirate strategies turn those ambitions into specific economic opportunities. Sector strategies provide the execution layer and indicate where businesses can participate through innovation, partnership, investment and capability development.

Each layer sends a different signal to a company. Federal strategies show the broader direction of travel. Emirate strategies indicate where economic activity, infrastructure and investment are likely to concentrate. Sector strategies often reveal the clearest commercial opportunities through specific programmes, incentives, partnerships and procurement pathways.

Read collectively, these layers produce five recurring opportunity themes, namely applied AI and autonomy, advanced manufacturing and industrial localisation, energy transition and deep decarbonisation, talent and lifestyle

ecosystems, and global connectivity and new economic platforms. A sixth priority, food and agricultural security, runs across several of these strategies on a longer horizon and is treated separately in the map that follows.

A list of strategies tells a company what the state intends. It tells it less about where that intent has already turned into deployed capital, regulation in force and a commercial access point that exists today. The next section sorts these themes into three horizons, drawing on three types of evidence for each.

Institutional architecture covers the strategy and regulatory framework in place. Capital and market access covers committed public funding together with the procurement or licensing mechanisms that turn that funding into a route to market. Execution proof looks at what is already operating today.

What this means for you

OPPORTUNITY

Reading federal direction, emirate positioning and sector mechanisms together reveals commercial openings that no single strategy document contains.

RISK

Each layer moves on its own timeline so a company that monitors only one layer will always operate with partial visibility, because without integrating all three, the organisation will consistently misread signals.

ACTION

Before assessing any specific opportunity, establish which layer actually controls access to it, since the federal target, the emirate programme and the procurement rule each require a different response.

Where the opportunities are opening now



Now:
open for business today

Advanced manufacturing and industrial localisation. Applied AI and the digital economy. Global connectivity and trade platforms.



Next:
opening over the coming years

Talent and lifestyle ecosystems. Energy transition and deep decarbonisation.



Longer term:
decades rather than budget cycles

Deep science, space and frontier technology commercialisation. Food and agricultural security.



Now: *open for business today*

Advanced manufacturing and industrial localisation

Why it matters: This is the clearest case because the mechanism is measurable. Operation 300bn provides the funded federal target. The ‘National In-Country Value’ programme provides the access route and operates as a live procurement rule, with local procurement and services spending by participating entities reaching AED 67 billion in 2023, a 26% year-on-year increase, and AED 48 billion in the first half of 2024 alone across 31 participating government entities and major national companies. Investments by ICV-certified companies totalled AED 205 billion by mid-2024.

Evidence it is happening: ADNOC’s own programme illustrates the scale available to a supplier. Its ICV programme has driven more than AED 307 billion back into the UAE economy since 2018, with 23,000 Emiratis employed in the private sector as reported at its November 2025 board meeting. The company awarded AED 54 billion of contracts to UAE suppliers in the second half of 2025 alone, plans to locally manufacture AED 90 billion of products within its procurement pipeline by 2030, and operates against an approved AED 551 billion capital expenditure plan for 2026 to 2030. In May 2026, it announced a further AED 200 billion of project contract awards over three years, directed explicitly at strengthening local supply chains. For a supplier, ICV standing affects pipeline access as well as tender scoring, making this the most concrete commercial mechanism in the architecture.

What can companies do now: Confirm ICV certification status, map current supply relationships against Operation 300bn’s target sectors and register interest with a national anchor buyer such as ADNOC ahead of its next procurement cycle.

Applied AI and the digital economy

Why it matters: The 'UAE Digital Economy Strategy' provides the funded federal target of doubling the digital economy's GDP contribution from 9.7% to 19.4%. Dubai's 'Universal Blueprint for Artificial Intelligence', its 'Robotics and Automation Programme' and 'Sandbox Dubai' are operating frameworks today.

Evidence it is happening: Evidence of execution is also visible in inbound capital, with the Ministry of Investment attributing part of the communications sector's FDI growth in 2025 to 'Stargate UAE', OpenAI's first international deployment, built with Abu Dhabi's G42. Abu Dhabi is investing AED 13 billion under its 2025 to '2027 Digital Strategy' towards becoming an AI-native government. The combination of a funded target, live regulatory sandbox and demonstrated capital inflow places this theme in Tier 1.

What can companies do now: Identify which regulatory sandbox fits the company's activity whether federal, Dubaii or an ADGM or DIFC pathway and open a dialogue with the relevant regulator before committing to a specific market entry route.

Global connectivity and trade platforms

Evidence it is happening: 'Comprehensive Economic Partnership Agreements (CEPA)' helped push non-oil foreign trade up 26% in 2025 to surpass 1 trillion USD, while the UAE ranked second worldwide for greenfield project count for a third consecutive year. These are outcomes already recorded rather than future targets. The 2026 period also tested this theme directly, and the infrastructure response, including the Habshan to Fujairah routing, absorbed a share of displaced volume. Companies whose business depends on physical connectivity should factor that demonstrated adaptability into their assessment alongside the headline trade figures.

What can companies do now: Register for a preferential certificate of origin under the relevant CEPA before the next shipment and stress-test logistics routing against a repeat of 2026-style disruption.



Next:
opening over the coming years

Talent and lifestyle ecosystems

The access mechanism here has reached maturity. Dubai's GDRFA alone granted 66,078 Golden Visas in the first half of 2026, alongside more than one million new residence permits, with demand holding steady through a volatile period. The wider ecosystem that determines whether that talent stays productively engaged is still at an earlier stage. This includes healthcare capacity, the full delivery of the Dubai 'Quality of Life Strategy 2033', and the education and skills infrastructure needed to convert visa volume into a durable talent base. The theme sits in Tier 2 because the access mechanism has moved ahead of the ecosystem intended to retain what it attracts.

What can companies do now: Review the Emiratisation position against the 31 December 2026 threshold and build retention into the talent plan rather than treating visa access as the finish line.

Energy transition and deep decarbonisation

The 'National Hydrogen Strategy' targets 1.4 million tonnes per annum of low-carbon hydrogen production by 2031 and 14.9 million tonnes by 2050, with two hydrogen oases due by 2031 rising to five by 2050, and a 25% emissions reduction in hard-to-abate sectors by 2031.

Evidence it is happening: At the time the strategy was published, legal commentary noted that ADNOC, TAQA, Masdar and Mubadala were already targeting 1.4 million tonnes of capacity between them by 2031, suggesting that the near-term milestone rests on commitments that already exist. The 2050 target represents more than a tenfold increase on that baseline and depends on a global hydrogen export market as well as domestic pricing and regulatory frameworks that are still taking shape. This mix of committed near-term capital and a longer-term thesis still under construction places the theme in Tier 2.

What can companies do now: Assess whether the company's hydrogen or decarbonization offering fits the near-term 2031 capacity build-out or the longer-dated 2050 export thesis, since the two call for different partners and timelines.



Longer term: *decades rather than budget cycles*

Tier 3 covers priorities that are clearly funded and clearly stated, but whose commercial windows open on timescales measured in decades rather than budget cycles. They belong in scenario work and long-horizon capability planning, and companies that ignore them entirely risk arriving late to positions that take years to build.

Deep science, space and frontier technology commercialisation

The architecture's longest-dated ambitions, most visibly under 'UAE Centennial 2071', describe national-scale capabilities in advanced research, space and frontier technology. The relevant question for most companies is less about immediate participation than about whether their own long-term capability roadmap intersects with where national research funding is heading.

What can companies do now: Track relevant research funding calls as a standing item rather than a one-off scan, since the entry point here is usually a partnership or grant window rather than a procurement tender.

Food and agricultural security

The UAE imports approximately 90% of its food. The 'National Food Security Strategy 2051' addresses that dependency through domestic production, agricultural technology and supply chain resilience, with a target of a top ten position on the 'Global Food Security Index'.

Evidence it is happening: Procurement activity is already visible today, with ADNOC's catering contractors having signed agreements worth over AED 540 million with 55 UAE-based sub-suppliers, building on prior contracts exceeding AED 1 billion running from 2022 to 2027, under a commitment to raise the share of UAE-grown produce across eleven key food categories. For companies in food production, agricultural technology, cold chain and logistics, this is a long-horizon theme with near-term commercial entry points, which makes it worth active monitoring rather than passive filing.

What can companies do now: Register as a supplier candidate with a major national catering or procurement programme, even where a specific contract is not yet open.

From opportunity map to action

The opportunity map shows where strategic weight is concentrating. Turning that into a position in the market follows four steps, each of which produces a decision rather than an observation.

Step 1



SCOPE THE OPPORTUNITY FOCUS

Before assessing any opportunity, a company needs to establish what genuinely falls within its own boundaries. This means confirming which geographies and emirates are in scope, which products and services could realistically participate, and how far down the supply chain the analysis needs to reach. Supply chain scope deserves particular attention in this market, since In-Country Value scoring and localisation requirements apply to first and second tier suppliers as well as to the contracting entity. The output of this step is a defined perimeter and a set of stated objectives, which prevents the subsequent analysis from spreading across opportunities the company was never going to pursue.

Step 2



STEP TWO, IDENTIFY THE OPPORTUNITIES AND THE ISSUES

Leadership teams get the most value from the tier map when they read each theme in two directions at once. The first looks inward at how far current capabilities, footprint and partnerships already position the company to capture a given opportunity. The second looks outward at how the company's own activity, localisation choices and stakeholder relationships could strengthen or weaken its standing as the surrounding environment evolves. This double materiality reading should then be given weight through a structured review of the company's strengths and weaknesses against each material theme, and by separating structural conditions from episodic ones. A regulatory sandbox that opens once behaves differently from a procurement requirement that tightens progressively, and the two call for different responses.

PRIORITISE OPPORTUNITIES AND RISKS

Not every identified opportunity deserves resourcing this year. Prioritisation should weigh four things, namely the realistic horizon before the opportunity becomes commercially accessible, the financial impact if the company captures or misses it, the stakeholders whose support determines access, and the targets the company is prepared to commit to. Foresight belongs here rather than as a separate exercise, and its purpose is to identify what would change the current picture.

The questions worth asking are structural:

Step 3



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Which regulatory or market development would move a second-horizon theme into the first, completing the ecosystem around an already committed capital base.

?

What happens to the company's positioning if a competitor secures a first-mover role inside a regulatory sandbox or procurement framework first.

?

What happens to a localisation-dependent strategy if In-Country Value requirements or Emiratisation targets tighten faster than the company's own workforce and supply chain plans allow.

?

What happens to the operating model if supply chain disruption becomes a recurring feature of the planning horizon.

Companies that ask these questions early retain room to manoeuvre. Those that wait for events to force the answer are more likely to find themselves operating under constraint.

Step 4



BUILD A READY ORGANISATION

The final step turns a prioritised list into an organisation capable of acting on it, and it rests on four components.

The advantage therefore tends to sit with the company that has already worked through these four steps before the window narrows.

Narrative development gives the organisation a clear story to tell about its role in the UAE’s priorities. This is where the North Star sits, meaning a credible and specific view of where the company intends to be positioned, expressed with more precision than a general intention to participate, and supported by a messaging hierarchy that aligns leadership, employees and external stakeholders around it.

Stakeholder mapping identifies which government, industry and community audiences determine access to a given opportunity, and how those audiences may have changed as the surrounding environment has evolved.

Strategy setting translates the priorities into resourced commitments with owners and timelines, which is where most opportunity maps quietly stall.

An action plan and roadmap sets out an initial agenda to test, measure and scale early actions, identifies the external enablers the company depends on, and defines the engagement pathways that reach the right stakeholders at the moments when engagement carries the greatest influence.

Knowing which institution governs which theme shortens that work considerably. The table below sets out where access actually sits.

THEME	INSTITUTION	MECHANISM	KNOWN TIMING
Advanced manu- facturing and localisation	Ministry of Industry and Advanced Technology	ICV certification, Technology Transformation Programme, Industrial Technology Transformation Index, offtake pipeline	‘Make it in the Emirates’, 3 to 6 May 2027
Industrial financing	Emirates Development Bank, with banks under ministry agreement	AED 18bn competitive financing facility, AED 1bn ‘National Industrial Resilience Fund’	Ongoing
Industrial siting, Abu Dhabi	Abu Dhabi Investment Office	Manufacturing hub agreements and expansion support	Ongoing
Applied AI and digital	Onshore federal regulators, DIFC and ADGM, each operating separately	Licensing and regulatory sandbox entry, jurisdiction-dependent	Application windows vary by regime
Trade and market access	Ministry of Economy and Tourism	Factory registration and preferential certificate of origin under CEPA	Registration required before first preferential shipment
Workforce and Emiratisation	Ministry of Human Resources and Emiratisation, with Nafis	Skilled-role quota, monthly contribution for shortfall, salary support through Nafis	Assessed 30 June and 31 December each year, 10% threshold due 31 December 2026
Food and agricultural security	MolAT, Ministry of Economy and Tourism, National CSR Fund	Import substitution policy supporting up to 200 food factories	Activated May 2026
Inbound investment	Ministry of Investment, with emirate-level investment offices	‘National Investment Strategy 2031’ priority sectors	Ongoing to 2031

What this means for you

OPPORTUNITY

Each of the four steps produces a decision that can be taken with information already in the public domain, and the institutions governing access are identifiable and published.

RISK

Most opportunity assessments stall between prioritisation and resourcing, because no owner is named and no timeline is set.

ACTION

Run the four steps as a single leadership session within the next quarter, and leave it with named owners and dates rather than a list of themes.

Conclusion

The next UAE advantage is readiness. The opportunities are increasingly visible. The competitive difference will be how quickly companies can interpret them, position themselves and act.

The UAE's opportunity map is a layered and overlapping system of federal, emirate-level and sector strategies moving on different timelines, with each capable of opening a commercial window on its own schedule.

Events in 2026 revealed something about that system that the 2025 growth figures alone could not show. The funding and ambition behind these strategies were sustained through a volatile period, while the capacity to reroute, absorb disruption and continue investing had been built in advance. The IMF's July 2026 assessment attributed that resilience to preparedness alongside balance sheet strength, an observation that companies can apply to themselves as readily as to the state.

The evidence assembled here suggests that state ambition has, in several respects, moved faster than the average company's capacity to read and act on it. That gap is where much of the opportunity now sits. Readiness has become a practical differentiator between companies that capture opportunities within this map and those that mainly observe them.

For leadership teams operating in or considering the UAE, the final question therefore comes back to the organisation itself. Has the company built the internal discipline needed to turn a fast-moving, transparent and well-funded opportunity landscape into decisions made early enough to matter?

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This is Leadership Navigation.

We hope you have found this report useful.

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