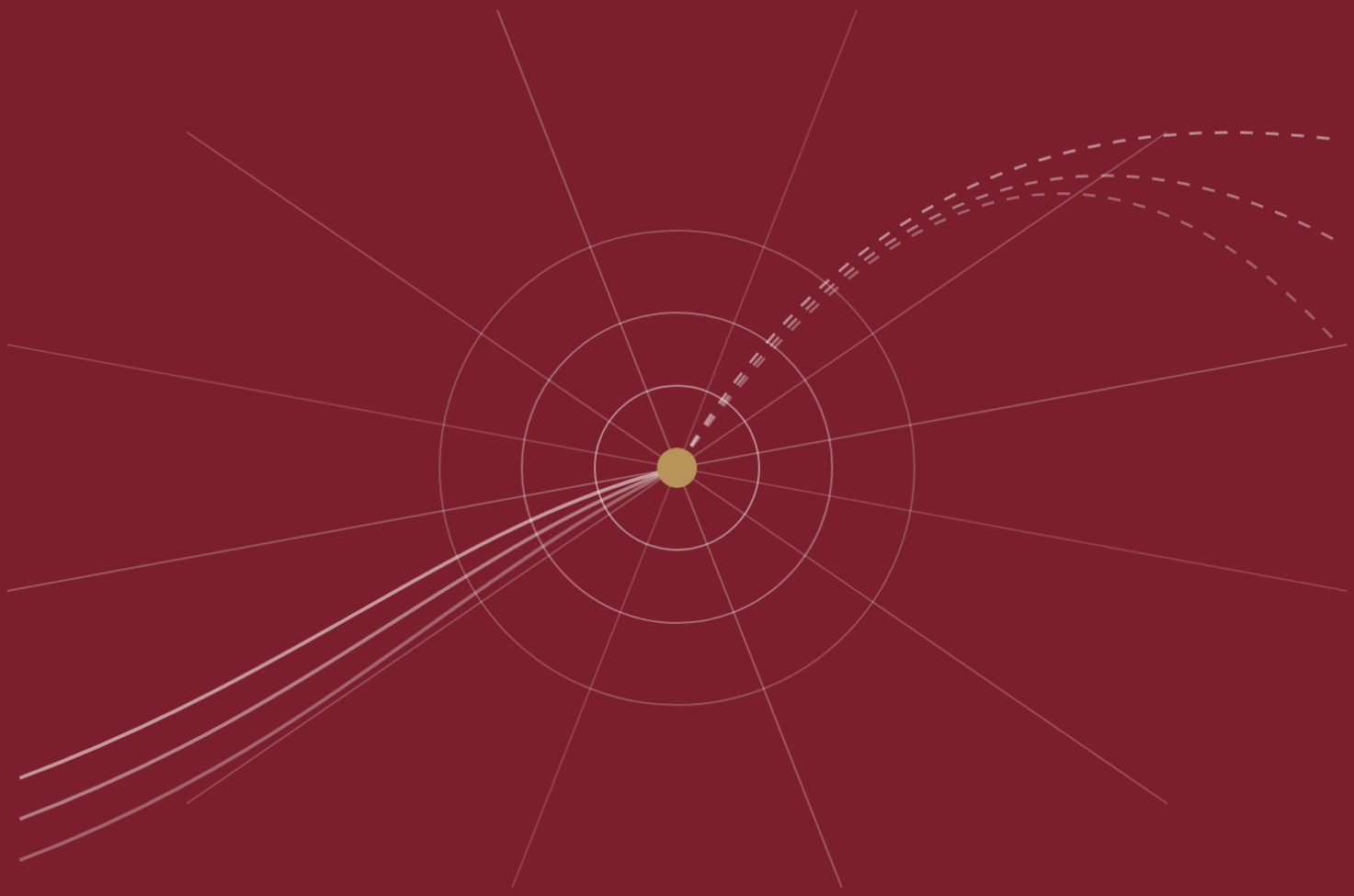
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POLICY PAPER · EPIC-PP-2026-038

The UAE as a Global Trade and Logistics Hub

Ports, Free Zones, Air Cargo and Rail Freight, 2024 to June 2026

EPIC Research Team

October 2026

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EPIC-PP-2026-038 · Economy & Energy · 31 October 2026 · EPIC Research Team

Abstract

The UAE recorded non-oil foreign trade of about AED 3.8 trillion (USD 1.03 trillion) in calendar year 2025, up 26.8% on 2024 (MoFT 2026). Re-exports of AED 830.2 billion were larger than non-oil exports of AED 813.8 billion, a sign of how far the country still serves as a redistribution point for goods made elsewhere (MoFT 2026). Growth carried on into the first half of 2026, with trade reaching AED 1.937 trillion, up 13.1% year on year (Dubai Media Office 2026). In 2026 the physical system behind those numbers came under severe strain. DP World reports that Jebel Ali handled 374,000 TEU in the second quarter of 2026, 90.1% fewer than a year earlier, while the port remained "fully operational with no physical damage" (DP World 2026b; 2026c). AD Ports Group reports that its UAE container throughput fell 65% in the same quarter, and that UAE port utilisation dropped to 22% (AD Ports Group 2026a). Both groups shifted cargo to east-coast terminals at Fujairah and Khor Fakkan and onto bonded road transit (DP World 2026c; AD Ports Group 2026a). This paper sets out the scale of the hub before the disruption, measures the operational effect in 2026 from company and official data, and identifies where the evidence on recovery runs out. The security causes of the 2026 disruption, shipping-lane analysis and the rerouting debate belong to EPIC paper 020 (sea-lanes) and are not repeated here. The India-Middle East-Europe Economic Corridor is covered in paper 033 and sovereign investment vehicles in paper 034.

Keywords: UAE; trade; logistics; non-oil foreign trade; re-exports; Jebel Ali; DP World; Khalifa Port; AD Ports Group; free zones; air cargo; Etihad Rail; Logistics Performance Index

1. Scope, sources and method

The paper covers four components of the hub: seaports, free zones, air cargo and rail freight. It uses the latest edition of each series available on 31 October 2026. Every figure carries its time span. Port volumes come from the operators' own disclosures and are labelled company-reported. National trade figures come from the Ministry of Foreign Trade and the Dubai Media Office. Air traffic rankings come from Airports Council International (ACI) World's 2025 rankings, published 7 July 2026. Logistics performance comes from the World Bank.

Two limits apply throughout. No official full-year port statistics for 2025, or half-year statistics for 2026, from the Federal Competitiveness and Statistics Centre were located for this paper, so operator figures carry most of the port analysis. National trade data for the first half of 2026 do not include a published re-export total, so the 2025 split cannot be updated to mid-2026.

2. The scale of UAE trade

2.1 Calendar year 2025

The Ministry of Foreign Trade reports that UAE non-oil foreign trade passed AED 3.8 trillion for the first time in 2025, a rise of 26.8% on 2024 (MoFT 2026; Figure 1). The ministry's components for 2025 were:

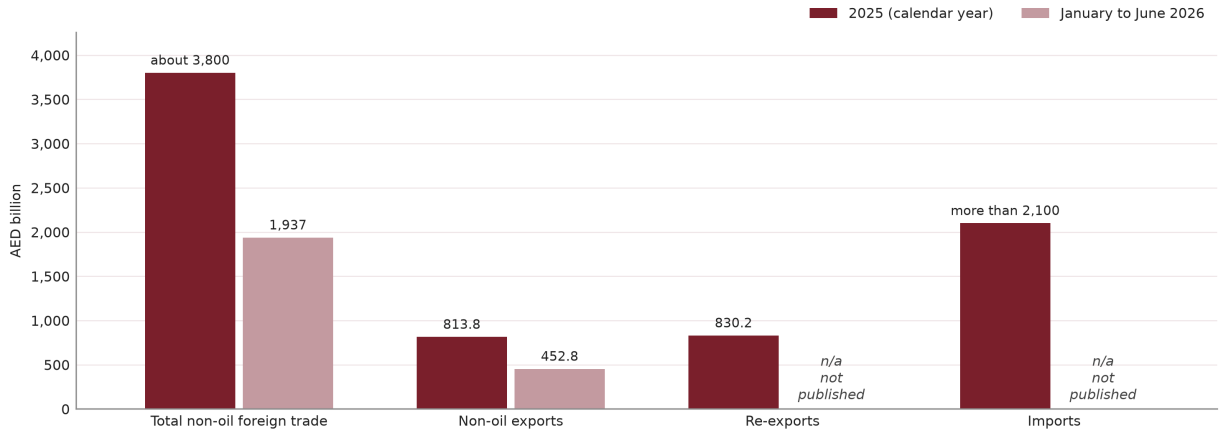
- non-oil exports of AED 813.8 billion, up 45.5%;
- re-exports of AED 830.2 billion, up 15.7%;
- imports of more than AED 2.1 trillion, up 25.7% (MoFT 2026).

Non-oil exports made up 21.6% of total non-oil trade (MoFT 2026). The ministry also reports that re-exports in 2025 were 21.3% higher than in 2023 and 29% higher than in 2022 (MoFT 2026). Exports to the 14 partners with an in-force Comprehensive Economic Partnership Agreement (CEPA) reached AED 175.5 billion (MoFT 2026). Fourth-quarter 2025 trade alone came to AED 1.1 trillion (MoFT 2026).

2.2 First half of 2026

The Dubai Media Office reports non-oil foreign trade of AED 1.937 trillion for January to June 2026, up 13.1% on the same period of 2025 (Dubai Media Office 2026). Non-oil exports were AED 452.8 billion, up 23.9%, and their share of total trade rose to 23.4% (Dubai Media Office 2026). The largest partners were China (AED 180.7 billion), Switzerland (AED 138.4 billion) and India (AED 107.5 billion) (Dubai Media Office 2026). Gold trade reached AED 706.2 billion, up 48.8% (Dubai Media Office 2026). Trade with in-force CEPA partners was AED 304.3 billion (Dubai Media Office 2026).

Figure 1. UAE non-oil foreign trade, 2025 and January to June 2026 (AED billion)



A full calendar year and a half year are not comparable; bars show levels, not growth. The 2025 total is approximate and 2025 imports are a lower bound, as published.
Re-exports and imports for January to June 2026 were not published in the release (n/a); no bar is shown.
Sources: MoFT 2026 (release of 31 January 2026); Dubai Media Office 2026 (release of 19 July 2026).

Figure 1. UAE non-oil foreign trade, 2025 and January to June 2026 (AED billion)

So the H1 2026 total rose even as container volumes at the two main UAE port operators fell sharply (Sections 3.1 and 3.2), and the published sources do not explain the gap. One reading consistent with the data is that high-value goods moved by air, notably gold, account for a large part of trade value and are less exposed to sea-lane disruption. It is an inference from the published gold figure; the official release does not say so.

2.3 Dubai's share and the free-zone layer

Dubai's external trade exceeded AED 3 trillion in 2025, according to the Dubai Integrated Economic Zones Authority (DIEZ) (WAM 2026). DIEZ, which groups Dubai Airport Free Zone, Dubai Silicon Oasis and Dubai CommerCity (Khaleej Times 2026), reported trade of about AED 491 billion in 2025, up 46%, equal to 16% of Dubai's non-oil trade (WAM 2026).

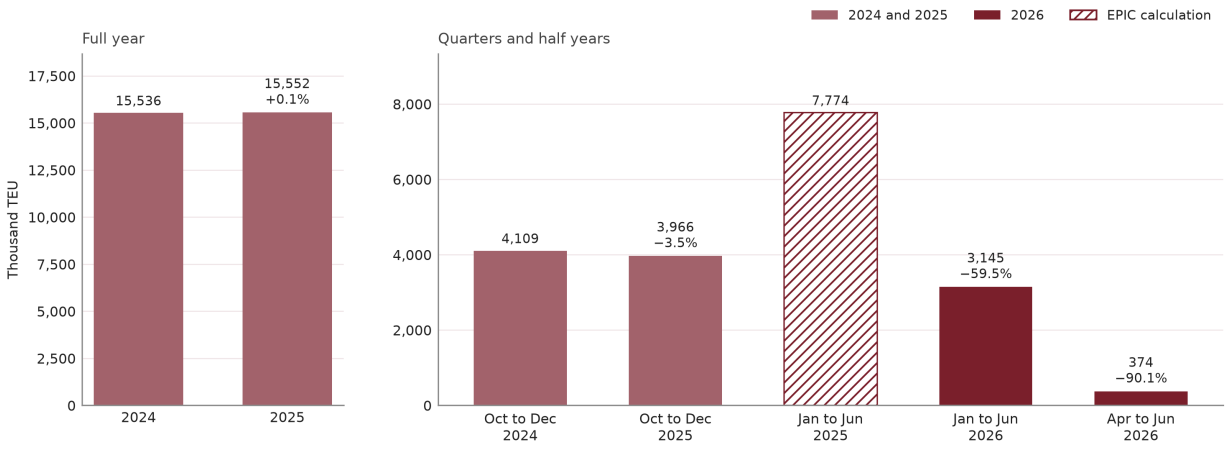
The Ministry of Economy and Tourism states that "more than 40 free zones" offer tax exemptions and full foreign ownership (MoET n.d.). No single official count was found, and third-party lists differ according to which zones they include, so this paper keeps to the ministry's wording.

3. Seaports

3.1 Jebel Ali and DP World

DP World reports gross container throughput of 93.4 million TEU across its global portfolio in 2025, up 5.8% from 88.3 million TEU in 2024 (DP World 2026a). Jebel Ali handled 15.55 million TEU in 2025 against 15.54 million in 2024, an increase of 0.1% (DP World 2026a; Figure 2). That put Jebel Ali at about 16.7% of the group's 2025 gross volume (calculation from DP World 2026a). In the fourth quarter of 2025 Jebel Ali volume was 3.97 million TEU, 3.5% lower than in the fourth quarter of 2024 (DP World 2026a).

Figure 2. Jebel Ali container throughput, 2024 to June 2026 (thousand TEU)



Company-reported (DP World). Percentages are year-on-year changes as reported. January to June 2025 is an EPIC calculation: group gross throughput minus group throughput excluding Jebel Ali (45,438 minus 37,664). July to September 2026 is not shown: the operator's nine-month statement was not available for checking.
Sources: DP World 2026a, p. 1; DP World 2026b, p. 1; DP World 2026c, KPI table.

Figure 2. Jebel Ali container throughput, 2024 to June 2026 (thousand TEU)

The group's 2025 results release adds detail on cargo other than containers. It reports a record 1.5 million vehicles handled at its Dubai terminals, up 18%, and Jebel Ali breakbulk of 5.67 million tonnes, up 6% and "the highest level in nearly two decades" (DP World 2026d). It also reports that Jebel Ali origin-and-destination volumes grew by about 9% in 2025 (DP World 2026d). Group revenue for 2025 was USD 24.4 billion, up 22%, with adjusted EBITDA of USD 6.4 billion (DP World 2026d).

The first half of 2026 tells a different story. Company-reported figures (Figure 2) are:

Period	Jebel Ali throughput	Change year on year
H1 2026	3.1 million TEU	-59.5%
Q2 2026	374,000 TEU	-90.1%

Source: DP World 2026b.

Group gross throughput fell to 42.8 million TEU in H1 2026 from 45.4 million TEU in H1 2025 (DP World 2026c). Excluding Jebel Ali, group throughput rose 5.4% to 39.7 million TEU (DP World 2026c). The company states that Jebel Ali remained "fully operational with no physical damage" and that vessel traffic was temporarily reduced (DP World 2026c). Group revenue in H1 2026 was USD 12.7 billion, up 13.1%, while adjusted EBITDA fell 5.6% to USD 2.86 billion (DP World 2026c).

DP World also announced plans for two new terminals in Fujairah under a 50-year concession and expected capital expenditure of about USD 3 billion in 2026, of which USD 1.5 billion had been spent in the first half (DP World 2026c).

3.2 Khalifa Port and AD Ports Group

AD Ports Group reports container throughput of 7.7 million TEU in 2025, up 23%, with 86% of that volume handled in the UAE (AD Ports Group 2026b; Figure 3). The group's container terminal capacity at the end of 2025 was 12.1 million TEU, of which 9.6 million TEU was at Khalifa Port, and group container capacity utilisation for the year was 63% (AD Ports Group 2026b). CMA Terminals Khalifa Port, which opened in January 2025, handled 1.3 million TEU at 74% utilisation in its first year (AD Ports Group 2026b). In the UAE, 63% of container volume was transshipment and 37% origin-and-destination cargo (AD Ports Group 2026b). General cargo reached 59.5 million tonnes, up 6% (AD Ports Group 2026b).

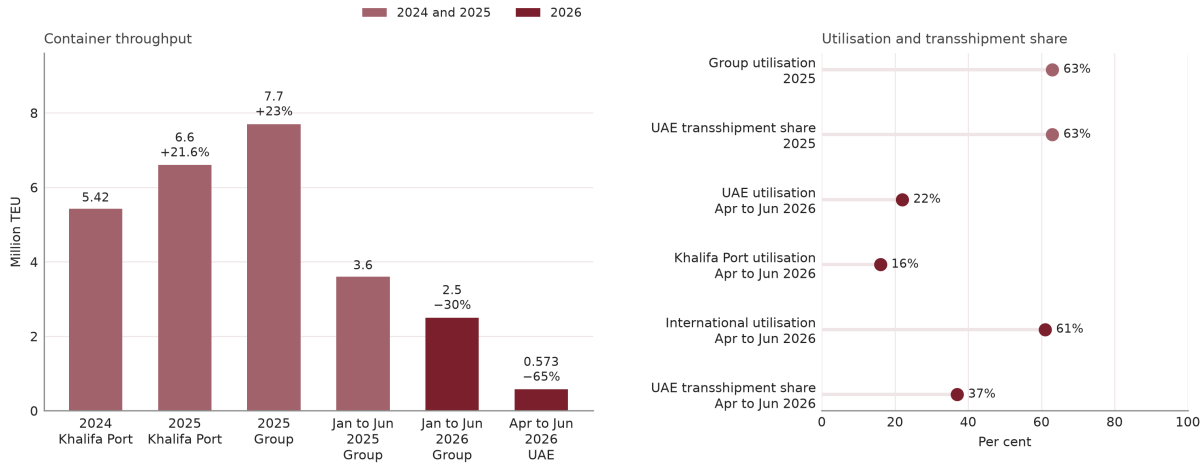
On 27 October 2026 the group reported that Khalifa Port had risen five places to 34th in the Lloyd's List Top 100 container ports, based on 2025 throughput of 6.6 million TEU, up 21.6% from 5.42 million TEU (AD Ports Group 2026c). The group states that the expansion of CMA Terminals Khalifa Port to 2.7 million TEU will raise Khalifa Port's capacity to 10.5 million TEU (AD Ports Group 2026c).

The second quarter of 2026 undid much of that growth. AD Ports Group reports:

- UAE container throughput of 573,000 TEU, down 65% year on year;

- UAE bulk and general cargo of 3.1 million tonnes, down 67%;
- UAE port utilisation of 22%, with Khalifa Port at 16%, against 61% at its international ports;
- group container volume of 2.5 million TEU in H1 2026 against 3.6 million TEU in H1 2025 (AD Ports Group 2026a).

Figure 3. AD Ports Group container throughput and utilisation, 2024 to June 2026



Company-reported (AD Ports Group). Scopes differ (Group, Khalifa Port, UAE ports, international ports) and are labelled; percentages beside bars are year-on-year changes as reported. 2024 Khalifa Port throughput is from the release of 27 October 2026.
Sources: AD Ports Group 2026b, p. 12; AD Ports Group 2026c (release of 27 October 2026); AD Ports Group 2026a, pp. 5, 12–13.

Figure 3. AD Ports Group container throughput and utilisation, 2024 to June 2026

The UAE transshipment share fell to 37%, with origin-and-destination cargo at 63%, the reverse of the 2025 split (AD Ports Group 2026a). The group describes alternative corridors through Fujairah Terminals and Khor Fakkan, with bonded transit by road, and reports adding 400 trucks during the quarter (AD Ports Group 2026a).

3.3 What the port data show

Both operators' data point the same way. Transshipment, which depends on mainline vessels calling at Gulf ports, fell faster than cargo destined for the UAE itself. Origin-and-destination cargo continued to move through east-coast terminals and by road. The UAE's port network therefore retained a domestic supply function in the second quarter of 2026 while losing much of its regional relay role for that period.

How much transshipment returned after June 2026 remains unclear from the data. AD Ports Group had not published third-quarter 2026 throughput in the sources reviewed for this paper. DP World nine-month 2026 throughput was reported in the press on 30 October 2026 (Al Bayan 2026); the operator's statement was not available for checking. Physical capacity is unchanged on the companies' own statements: Jebel Ali reported no damage and AD Ports continued capacity expansion at Khalifa Port.

4. Air cargo

ACI World's 2025 rankings, published in July 2026 after ACI's validation process, place Dubai International (DXB) 11th in the world for air cargo, with 2,146,173 tonnes of loaded and unloaded freight and mail, down 1.4% on 2024 and 14.7% below 2019 (ACI World 2026). DXB ranked second in the world for passengers, with 95,192,160 passengers in 2025, up 3.1% (ACI World 2026). These are ACI figures, not the airport operator's own final statistics; an official Dubai Airports full-year 2025 cargo total was not located.

EPIC's reading is that air cargo matters for the hub argument because some of the highest-value trade lines, gold among them, may move by air. No source used here breaks UAE trade value down by mode of transport, so this is an inference, not a sourced finding.

5. Rail freight

The UAE Government portal states that Etihad Rail's 900 km network "will extend across the United Arab Emirates", and that in 2023 Etihad Rail inaugurated the network expansion linking all seven emirates, from Ghuwaifat to Fujairah, and launched freight train operations across the country (UAE Government 2026). A 264 km line has carried granulated sulphur from Shah and Habshan to Ruwais since 2016 (UAE Government 2026). The portal states that passenger services will launch "by 2026" (UAE Government 2026).

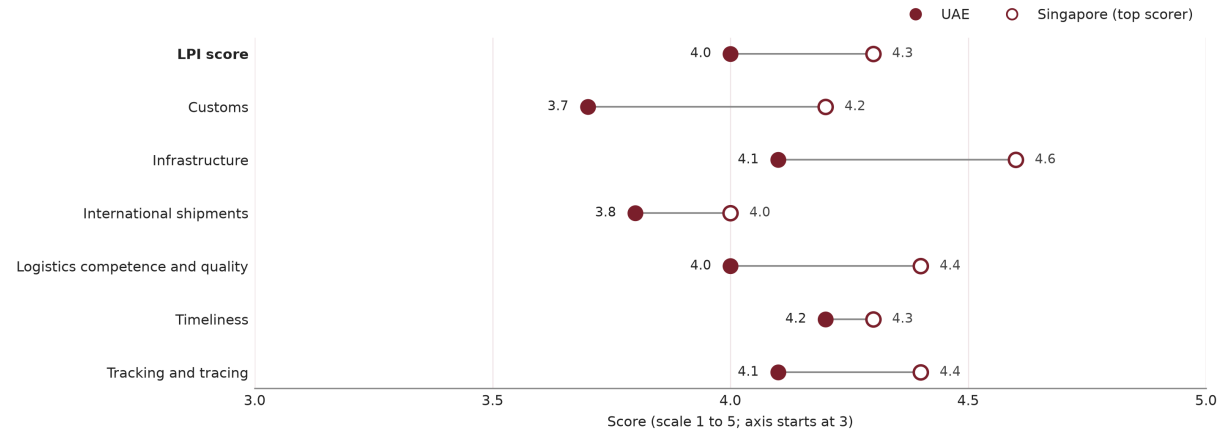
Etihad Rail reports that in 2025 it moved more than 6.5 million tonnes of sulphur, more than 10 million tonnes of aggregates and 148,000 containers (Etihad Rail 2026). The company states that this removed more than 500,000 truck journeys in the Al Dhafra region (Etihad Rail 2026). It reports that Hafeet Rail, the joint network with Oman, had reached 30% completion by January 2026 (Etihad Rail 2026). All Etihad Rail figures are company-reported.

Rail links the west-coast ports to Fujairah on the east coast. The 2026 port data in Section 3 show east-coast access gaining operational value. The sources reviewed do not report rail container volumes for 2026, so rail's share of the rerouted cargo cannot be measured.

6. Logistics performance

The World Bank's 2023 Logistics Performance Index (LPI), the latest edition with a composite country score, gives the UAE a score of 4.0 out of 5 (World Bank 2023; Figure 4). Six economies scored higher, and the World Bank's grouped rank places the UAE seventh, joint with five others on 4.0 (World Bank 2023, Appendix 1). Its component scores were 3.7 for customs, 4.1 for infrastructure, 3.8 for international shipments, 4.0 for logistics competence, 4.2 for timeliness and 4.1 for tracking and tracing (World Bank 2023). Customs was the weak spot.

Figure 4. UAE and Singapore scores in the World Bank Logistics Performance Index, 2023



Survey-based index, 2023 edition; the survey predates the 2026 disruption. The 2025 LPI 2.0 report is not directly comparable and gives no UAE composite score.
Source: World Bank 2023, PDF p. 10.

Figure 4. UAE and Singapore scores in the World Bank Logistics Performance Index, 2023

The World Bank's 2025 report, "Connecting to Compete 2025: The New Logistics Performance Indicators 2.0", replaces the survey-based composite with indicators drawn from trade and tracking data (World Bank 2026). The text of that report does not present a UAE score in the form used in 2023, so the two editions are not directly comparable and the 2023 rank remains the last ranked UAE result. The survey for the 2023 edition predates the 2026 disruption.

7. Policy implications

The evidence points to five conclusions for policy.

1. **Trade value and port volume diverged in H1 2026.** Official trade value rose 13.1% while the main operators' UAE container volumes fell by more than half in the second quarter. Trade reporting would be easier to read if the official half-year release included re-exports and a breakdown by mode of transport.
2. **Transshipment is the exposed segment.** The inversion of AD Ports Group's UAE split from 63% transshipment to 37% suggests the relay business carries most of the risk from sea-lane disruption. Origin-and-destination cargo proved more resilient.
3. **East-coast capacity has gained weight.** DP World's planned Fujairah terminals and AD Ports Group's use of Fujairah and Khor Fakkan show both operators investing in that coast. EPIC paper 020 assesses the security and routing questions this raises.
4. **Rail data would support planning.** Etihad Rail publishes annual freight totals. Quarterly container data for 2026 would show whether rail is carrying a measurable share of rerouted cargo.
5. **Customs is the weakest LPI component.** At 3.7 in 2023, customs trailed every other UAE component score. The LPI 2.0 indicators may give a more current measure once country tables are reviewed.

8. Limitations

Port figures are company-reported and have not been checked against official port statistics, which were not located for 2025 or 2026. The H1 2026 trade release does not give re-exports. DP World's nine-month 2026 throughput has so far been reported only in the press (Al Bayan 2026; see Section 3.3). Causal claims about the 2026 disruption are outside the scope of this paper and are left to paper 020.

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EPIC Research Team. Chicago author-date. All links checked 31 Oct 2026. "Route" records how each source was obtained. Company-reported figures are labelled in the paper and figures.

Dated source log

Date checked	Key	Route	Status
31 Oct 2026	MoFT 2026	Opened	Retrieved
31 Oct 2026	Dubai Media Office 2026	Opened	Retrieved
31 Oct 2026	DP World 2026a	Opened (DP World content hub)	Retrieved
31 Oct 2026	DP World 2026b	Opened	Retrieved
31 Oct 2026	DP World 2026c	Opened	Retrieved
31 Oct 2026	DP World 2026d	Opened	Retrieved
31 Oct 2026	AD Ports Group 2026a	Archived copy (Internet Archive, 10 Oct 2026); live link unavailable	Retrieved
31 Oct 2026	AD Ports Group 2026b	Archived copy (Internet Archive, 10 Oct 2026); live link unavailable	Retrieved
31 Oct 2026	AD Ports Group 2026c	Opened	Retrieved
31 Oct 2026	Al Bayan 2026	Opened	Retrieved; dated 30 Oct 2026; press report, not used as company data
31 Oct 2026	ACI World 2026	Opened	Retrieved; 2025 rankings published 7 Jul 2026
31 Oct 2026	Etihad Rail 2026	Opened	Retrieved; dated 28 Jan 2026
31 Oct 2026	UAE Government 2026	Opened	Retrieved; page updated 28 Oct 2026
31 Oct 2026	Khaleej Times 2026	Opened	Retrieved; dated 7 Jun 2026; used only for the DIEZ member-zone list
31 Oct 2026	MoET n.d.	Opened	Retrieved; undated page
31 Oct 2026	World Bank 2023	Opened	Retrieved

Date checked	Key	Route	Status
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31 Oct 2026	WAM 2026	Opened	Retrieved; dated 7 Jun 2026
31 Oct 2026	DP World 9M 2026 throughput statement	Searched DP World news and investor pages and the Internet Archive	Not found. DP World nine-month 2026 throughput was reported in the press on 30 October 2026 (Al Bayan 2026); the operator's statement was not available for checking. Press figures not used as company data

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