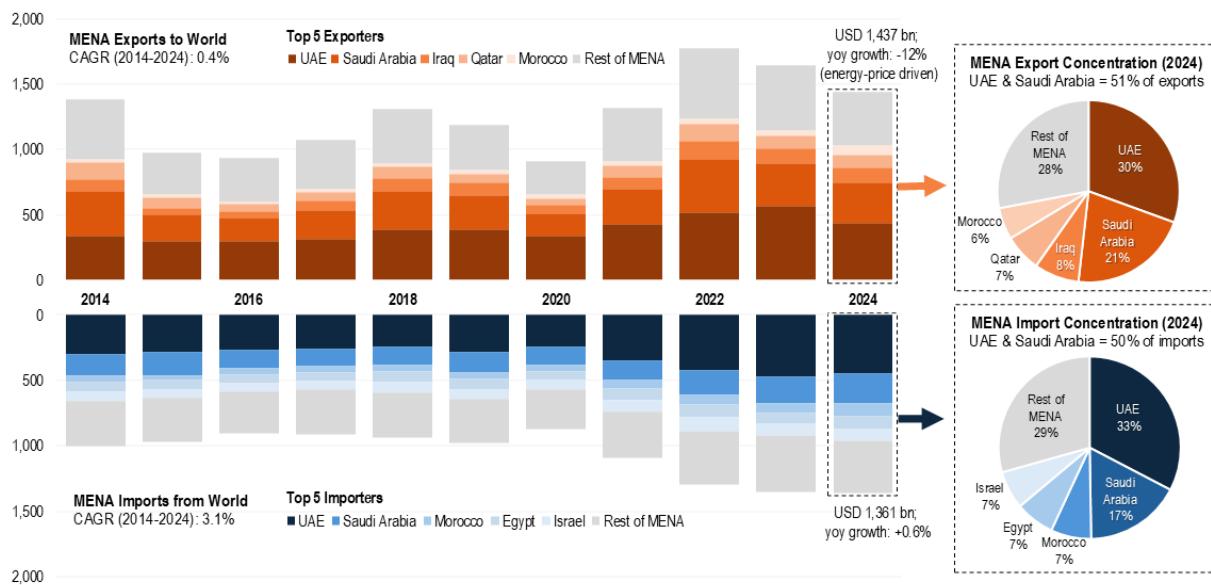




MENA's Trade Growth Is Now Being Driven by Imports, Not Exports

Exports have stagnated over the past decade, while imports have risen steadily, reinforcing MENA's demand-led growth story and strengthening the case for investment in logistics, distribution and trade.

Middle East & North Africa (MENA) Trade with the World, USD bn (2014-2024)



Note: MENA includes Algeria, Bahrain, Egypt, Iran, Iraq, Israel, Jordan, Kuwait, Lebanon, Libya, Morocco, Oman, Qatar, Saudi Arabia, Tunisia, UAE, West Bank & Gaza and Yemen.
Source: UN Comtrade, Trade Map, ANDAMAN PARTNERS Analysis

The trade profile of the Middle East & North Africa (MENA), a region comprising 18 economies, is increasingly shaped by import momentum rather than export expansion. Over 2014-2024, the region's exports to the world grew only marginally (CAGR 0.4%), while imports expanded steadily (CAGR 3.1%), signalling a structural shift toward demand-led growth and rising purchasing power.

In 2024, MENA exports totalled USD 1.44 trillion (down 12% yoy, largely energy-price driven), while imports reached USD 1.36 trillion (up 0.6% yoy), reinforcing the region's resilience as a global import market even during commodity-cycle volatility.

Trade flows remain highly concentrated. On the export side, the UAE (30%) and Saudi Arabia (21%) together account for 51% of total MENA exports, reflecting their role as both hydrocarbon exporters and trade intermediaries. They are followed by Iraq (8%), Qatar (7%) and Morocco (6%), highlighting the continued dominance of energy-linked exporters alongside Morocco's more diversified manufacturing base.

Import concentration is similarly high: the UAE (33%) and Saudi Arabia (17%) account for 50% of total MENA imports, while Egypt (7%), Israel (7%) and Morocco (7%) round out the top five.



MENA is becoming a more attractive region for consumer goods, industrial inputs, food, machinery and construction-linked imports, with the UAE and Saudi Arabia strengthening their role as regional gateways. For exporters and logistics players, the opportunity is increasingly concentrated in firms that can combine distribution scale, supply-chain efficiency and hub-based market access across the broader MENA region.

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