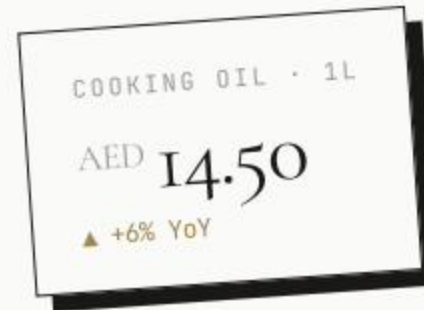


— MARKET SIGNAL · PRICING & CHANNEL

The UAE just  
made shelf  
pricing *a*  
*public*  
*conversation.*



*For FMCG brands eyeing Dubai entry in the next 12 months, this isn't a compliance footnote — it's a structural shift.*



Dominique Silvarelli  
Founder & Managing Director, Progress Partners



— WHAT HAPPENED · 03 MAY 2026

# Daily price tracking goes public on 33 staples.

The UAE Ministry of Economy and Tourism switched on the *Essential Goods Prices Platform* — letting any shopper compare daily prices on 33 staples across the country's 12 largest retailers.

Cooking oil, dairy, rice, bread, poultry. Data flows in automatically from Carrefour, Lulu, Spinneys and the rest. Updated every day.

For brands operating in the GCC, this is the most consequential pricing-policy move of the year.

33

Essential SKUs tracked daily

12

Retailers integrated at source

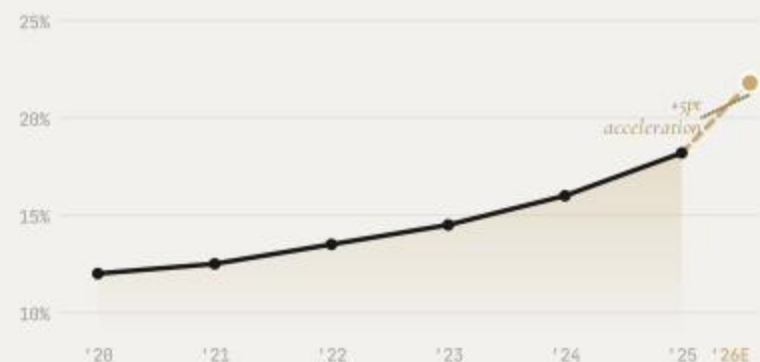
I\*

Tap to compare vs private label

FIG.

## Private label share, UAE modern trade

Indicative %, 2020 → 2026E. Acceleration expected post-transparency.



● Historic share ● Post-transparency forecast



— WHY IT MATTERS · THREE STRUCTURAL SHIFTS

*If you've sat in a UAE pricing review, you already know what's coming.*

01 The **annual price increase muscle** most global brands rely on will atrophy here first. List-price elasticity collapses when comparison is one tap away.

PRICING

02 **Private label gets the tailwind.** Carrefour, Lulu and Spinneys already run credible own-brand programs. Transparency accelerates switching.

CHANNEL

03 If the model travels to **KSA, Qatar or Oman** — and these things tend to — your GCC pricing has to be coherent across markets.

STRATEGY

*"When a shopper benchmarks your SKU against private label in two taps, list-price elasticity collapses."*

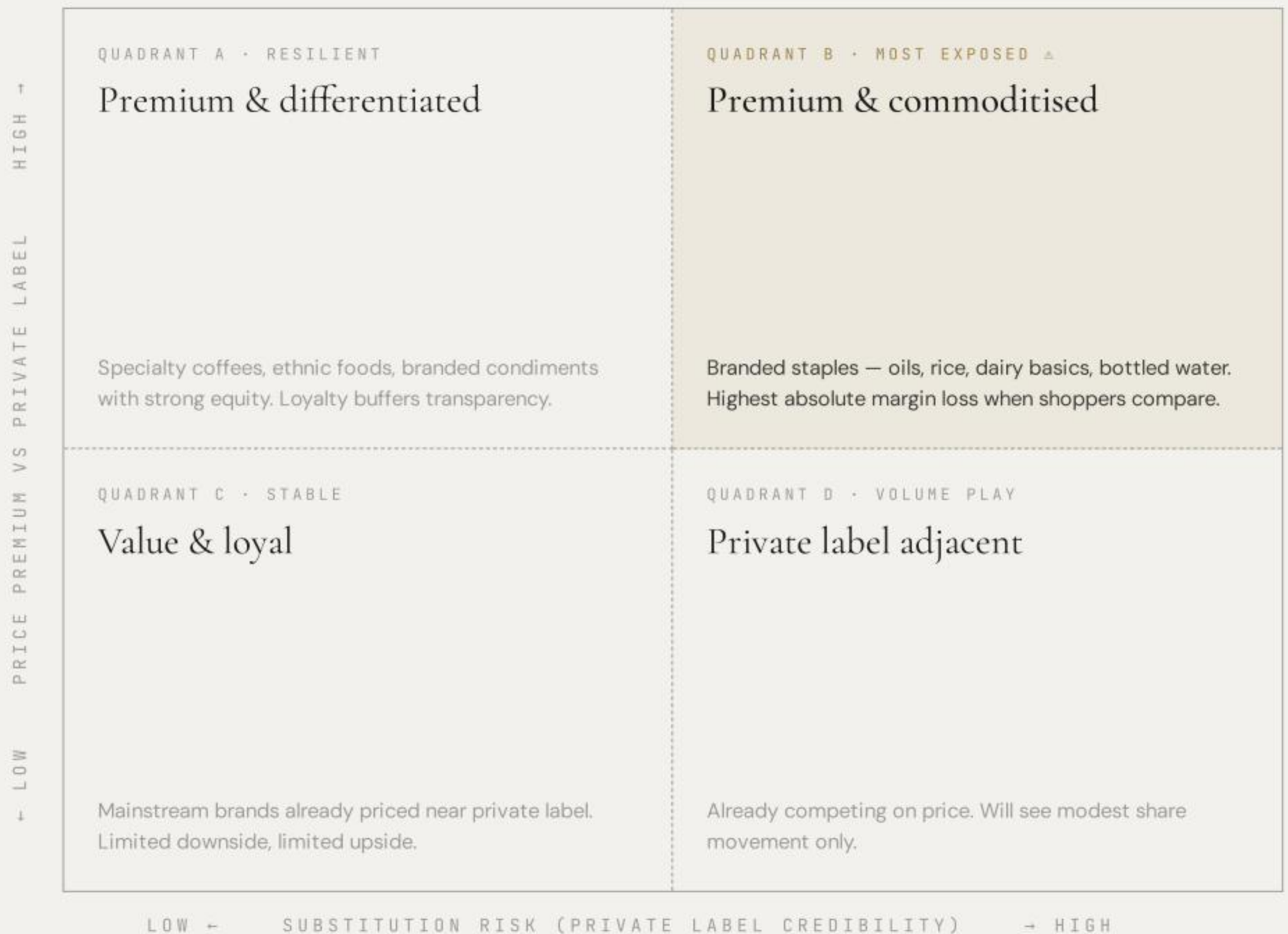
— FROM A UAE PRICING REVIEW, 2025



— WHO'S EXPOSED · A 2x2 READING

# Not every brand is equally vulnerable.

Map your portfolio against price-premium and substitution risk. The bottom-right quadrant is where margin compression hits first and hardest.





— THE PLAYBOOK · THREE MOVES TO MAKE THIS QUARTER

## If you're in Quadrant B, here's the priority order.

Three moves I'd run with any FMCG leader sitting on a vulnerable UAE portfolio. None of these need a global mandate to start.

**01** Reset your price ladder, don't defend the list. Pull a multi-tier architecture (good / better / best) where the entry tier sits within 8–12% of private label. Reinvest savings in mid- and premium-tier mix. Margin-mix beats margin per SKU when the spread is visible.

Q2 '26

**02** Renegotiate trade terms before the retailer does. Carrefour and Lulu will arrive with private-label expansion proposals within 2 quarters. Lock listing fees, MAP tolerances, and category captaincies *now* while you still have leverage.

60 DAYS

**03** Build a non-tracked tier. The 33 SKUs are commoditised staples. Move 15–20% of A&P behind value-added formats — premium SKUs, healthier variants, gifting, foodservice — where private-label competition is structurally weaker.

12 MONTHS



— 30 / 60 / 90 · FROM DECISION TO DEFENCE

# A practical sequence — not all at once.

Start narrow, learn fast, then scale. Most pricing-defence programmes fail because they try to fix everything at once.

— 30 DAYS

## *Diagnose*

- › Map portfolio to the 2x2
- › Quantify margin at risk per SKU
- › Identify Quadrant B priority list

— 60 DAYS

## *Defend*

- › Reset price ladder, top 5 SKUs
- › Renegotiate trade terms with KAs
- › Lock category captaincy clauses

— 90 DAYS

## *Pivot*

- › Reallocate A&P to non-tracked tier
- › Build premium / value-add pipeline
- › Stress-test for KSA / Qatar rollout

"The window before private label scales is the window. Use it."



— THE BOTTOM LINE

# Entry pricing has to be *defensible* *on day one.*

*Not optimised for the second wave. The winners in this next chapter won't be the brands with the boldest launch budgets — they'll be the ones whose margin model survives transparency.*

If you're scoping a UAE or GCC entry, sitting on a Quadrant B portfolio, or reviewing your 2026 RGM plan — DM me directly. I run shorter mandates (4–8 weeks) and longer interim COO assignments out of UAE and Singapore.



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*More news on [proccesspartners.com/newsletter/](https://proccesspartners.com/newsletter/)*

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