

Final report

Project title: AV23004 - International Avocados Middle East Study Tour

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Public Summary

Building on the success of the 2023 Avocado Gulfood and Middle East Study Tour, Australian avocado growers and exporters returned to the Gulf Cooperation Council (GCC) region in both 2024 and 2025 to deepen market engagement and strengthen trade relationships. The 2023 program had laid a solid foundation. In FY 24 retailers and importers across the region collectively sold over 495 tonnes of Australian avocados which grew from less than 90 tonnes in FY 22. Encouraged by this success and with promising growth prospects, industry participants sought to expand their footprint and gain deeper insights into consumer trends and market dynamics through consecutive in-market visits.

Ahead of both Gulfood exhibitions, webinars were delivered to provide market briefings for growers unable to travel, with recordings made available on the Best Practice Resource (BPR) portal. These sessions ensured broader industry participation and provided timely updates on market conditions. Across the two years, the program included not only participation at Gulfood in Dubai but also expanded into Kuwait, Jeddah, Abu Dhabi, Bahrain, and Muscat. Growers and exporters visited supermarkets and wholesale produce markets, met directly with key retailers, importers, and distributors, and participated in structured business matching meetings. These interactions offered first-hand exposure to retail environments and consumer expectations while supporting strategic conversations around supply capabilities and market fit.

The integrated approach across both years delivered high levels of industry engagement and market intelligence. Exporters gained valuable insights into local supply chains, competitive positioning, and evolving consumer preferences. This knowledge has been instrumental in shaping business-level export strategies, enhancing market readiness, and reinforcing Australia's reputation as a premium avocado supplier. The visits also played a key role in strengthening existing partnerships and initiating new trade discussions that are expected to translate into long-term commercial outcomes.

To date, the initiative has contributed to exponential growth in Australian avocado exports to the Middle East, heightened awareness of the industry's capabilities, and a clear appetite within the sector to pursue continued expansion in the region. Looking ahead, it is recommended that future market programs continue to broaden geographic coverage, foster deeper engagement with major retail chains, and prioritise category education and consumer promotion. Further research into competitor dynamics, cold chain logistics, and varietal performance would provide additional value and support sustained export success in the high-potential GCC market.

Keywords

Australian avocados; avocado export; GCC markets; Middle East trade; Gulfood; avocado market development; fresh produce export; trade missions; avocado industry insights; international study tour

Introduction

The Australian avocado industry is experiencing a strong growth phase, with production volumes projected to more than double that of 2021 levels by 2026. This surge is driven by extensive new plantings, particularly in regions like North Queensland, Central Queensland, and Western Australia, where many orchards are yet to reach full production. Consequently, the industry faces the challenge of absorbing an additional 90,000 tonnes of avocados annually, necessitating the expansion of both domestic and international markets to maintain profitability and sustainability.

In response to the potential oversupply of the domestic market, the Avocado Strategic Investment Plan (SIP) 2022-2026 outlines a clear objective: to support the success of the Australian avocado industry by utilising globally competitive production systems, increasing domestic demand, developing export markets, and improving consistent product quality. A key target within this plan is to achieve annual exports of at least 20,000 tonnes by 2026, at profitable farm gate prices, thereby alleviating domestic market saturation and enhancing grower returns.

One key project that is contributing to this export-focused strategy is the Avocado market access and trade development project (AV20004 & AV23003). This project, funded by Hort Innovation and managed by Avocados Australia, aims to prepare the industry for export by building capacity, pursuing new and improved market access, and supporting government negotiations.

Building on these initiatives, the Avocado Export Strategy 2022-2026 further refines the direction for market access prioritisation, industry export capability building, and international market development. The strategy emphasises the importance of understanding target markets to enable targeted and effective investments and to fostering relationships with key stakeholders to enhance the industry's ability to meet international market requirements and quality expectations.

The Avocado Australia Middle East Market Tours conducted in 2024 and 2025 are direct implementations of these strategic objectives. By facilitating grower and exporter engagement with Gulf Cooperation Council (GCC) markets, these tours aim to establish and strengthen trade relationships, gain firsthand market insights, and position Australian avocados competitively in the Middle East. These efforts are critical in diversifying export destinations and achieving the industry's overarching goal of sustainable growth through expanded international trade.

Methodology

The AV23004 project was an international market development initiative aimed at increasing Australian avocado exports and diversifying market access, with a focus on the Gulf Cooperation Council (GCC) region. It involved two study tours in February 2024 and 2025, aligned with Gulfood, the region's leading food trade event. These tours provided growers and exporters with exposure to key markets, retail environments, and trade networks, supporting long-term commercial relationship building.

Each tour featured participation in Gulfood, retail and wholesale market visits, and one-on-one meetings with importers, distributors, and retailers. In 2024, visits included Dubai, Kuwait City, and Jeddah, while in 2025 the program expanded to Abu Dhabi, Bahrain, and Muscat. Across both years, over 35 stores were visited and more than 40 B2B meetings held, offering valuable insights into pricing, category management, and competition.

To extend value beyond attendees, pre-tour webinars provided market insights and export training to a national audience. Recordings and resources were shared via the Best Practice Resource (BPR) portal and broader communications channels, including social media, newsletters, and trade media.

Led by Avocados Australia, and guided by a Project Reference Group of growers, exporters, and supply chain partners, the project was designed to align with the Avocado Export Strategy 2022–2026. The face-to-face engagement approach was essential in the GCC, where relationship-building and trust are critical, particularly for a perishable product like avocados.

The project engaged participants from all major producing states, delivering national benefit through practical insights, capability development, and strengthened readiness for market growth in the Middle East.

Photos/images/other audio-visual material

Images from the 2024 and 2025 study tour [can be found in this Google Drive folder](#).

Results and discussion

The 2024 and 2025 Middle East study tours successfully delivered on the project's objectives of increasing industry knowledge, building market connections, and accelerating trade readiness in the Gulf Cooperation Council (GCC) region. Across both years, significant in-market engagement took place, including over 40 structured B2B meetings with leading importers, distributors, and retailers across the UAE, Kuwait, Saudi Arabia, Bahrain, and Oman. Delegates also visited more than 35 retail outlets and wholesale markets, allowing them to conduct detailed competitor benchmarking, category audits, and market pricing reviews.

Store visits revealed a consistent and growing presence of avocados across major retail chains, particularly in premium and mid-tier outlets such as Carrefour, Lulu Hypermarket, Waitrose, and Spinneys. Australian avocados were positively received and consistently positioned as a premium product, although competition from Kenya, Peru, and Mexico remain strong. Feedback from buyers indicated a strong interest in the quality, consistency, and branding of Australian avocados. However, cost competitiveness continues to be critical factor influencing long-term purchasing decisions. In both years, several new trade relationships were initiated, and discussions for trial shipments and seasonal supply programs were advanced.

Observations during these tours confirmed a growing consumer familiarity with avocados, driven by health trends and the expansion of Western and fusion cuisine. Opportunities exist to build category share through education, sampling, and targeted promotional activities, particularly in emerging markets like Oman and Bahrain.

The outcomes of this project demonstrate strong market potential for Australian avocados in the GCC region, especially in the UAE and Saudi Arabia where premium produce is in high demand. The project has generated key insights into market dynamics, including pricing levels, and merchandising preferences, all of which can inform packing, labelling, and supply chain decisions for exporters. For Australian horticultural businesses, particularly avocado growers and exporters, these results underscore the importance of targeted market entry strategies backed by cultural understanding and consistent in-market presence. Exporters should continue leveraging the relationships formed during these tours and explore formalising seasonal supply agreements with high-potential buyers.

Outputs

Table 1. Output summary

Output	Listed in M&E Plan: • Yes • No	Description	Evidence and data
2024 - An itinerary to outline the study tour	Yes	An itinerary to outline a 10-day program including meetings at Gulfood and study tours to Kuwait, the United Arab Emirates (UAE) and Saudi Arabia	See Appendix A
2024 - A series of meetings with retailers and importers in GCC	Yes	A series meetings were arranged with retailers and importers in the region to generate market insights, understand market competition and promote Australian avocados.	The delegates met with over 20 importers and retailers at Gulfood and during the study tour. A list of meetings – 15 included in the Appendix B
2024 - A series of store visits across 3 major cities in GCC to understand the retail dynamics	Yes	Store visits were arranged and delivered for the delegates who took part to the study mission	Visited over 15 retail stores A list of stores is included in Appendix B
2024 - A series of communications via the industry communication channels	Yes	A number of communications have been shared to provide industry with timely updates via social media as well as articles published in Talking Avocado to provide in-depth market observations.	A webinar was delivered to share the GCC market insights with the broader industry. A total of 32 participants attended the webinar. Key topics covered in the webinar included; <ul style="list-style-type: none"> • Market Comparison Snapshots across the UAE, KSA and Kuwait • Avocado Category Performance & Trade Data • Channel Trends & In-Store Videos • Competitor Audit • Case Study & Pre-Departure Briefing View webinar here Social post and study mission updates are shared via LinkedIn, Talking avocados and Facebook. (Appendix C)
2025 - An itinerary to outline the study tour	Yes	A detailed itinerary outlining a 10-day market visit covering supermarket tours, retailer	See appendix E

		meetings, and participation at Gulfood 2025 across UAE, Bahrain, and Oman.	
2025 - A series of meetings with retailers and importers in GCC	Yes	Arranged meetings with key retailers and distributors across UAE, Bahrain, and Oman to discuss trade opportunities and gain market insights	The delegates met with over 30 importers and retailers at Gulfood and during the study tour. The full list of meetings can be found in appendix E and F
2025 - A series of store visits across 3 major cities in GCC to understand the retail dynamics	Yes	On-site store walkthroughs in Dubai, Abu Dhabi, Bahrain, and Muscat to understand in-store merchandising, price points, and competitor products.	Visited over 20 retail stores and fresh market outlets A list of the stores is highlighted in Appendix E and F
2025 - A series of communications via the industry communication channels	Yes	Communication of market insights via a pre-departure webinar and post-visit communications through social media and industry reports.	A webinar was held on Nov 21, 2024. Topics included: market comparisons, category performance, trade data, and Gulfood prep. Additional insights disseminated via Export Connect to travelling delegates.

Outcomes

Table 2. Outcome summary

Outcome as listed in M&E Plan	Progress to achieving outcome	Evidence and data	Progress:
2024 - Maintain and further drive the engagement with importers and retailers in GCC	<p>Guided Tour to a minimum of 3 supermarket outlets in each of Kuwait, Dubai and Jeddah</p> <p>Met with over 20 importers and retailers at Gulfood and during the study tour.</p>	<p>Outlets Visited in Kuwait on Saturday 17th February: Monoprix, City Centre, Sultan Centre, Lulu Hypermarkets , Nesto Hypermarket</p> <p>Outlets Visited in Dubai on Sunday 18th February: Waitrose, Grandiose, Carrefour, Lulu Hypermarkets, Choithrams</p> <p>Outlets Visited in Jeddah on Friday 23rd February: Lulu Hypermarkets, Manuel, Danube, Carrefour</p>	Achieved
2024 - Insights and market competition knowledge were generated during the study tour	<p>A report produced contains detailed information including;</p> <ul style="list-style-type: none"> • Supermarkets visited in each of Kuwait, Dubai and Jeddah • Business matching in Kuwait and Jeddah • Buyer introductions at Gulfood • The GCC Market Visit Perspectives article 	<p>Produced an article that includes key economic statistics, GCC demographic information and observations from the market.</p> <p>Appendix B and D</p>	Achieved
2025 - Maintain and further drive the engagement with importers and retailers in GCC	<p>Guided store visits and meetings with buyers and distributors in UAE (Dubai and Abu Dhabi), Bahrain, and Oman</p> <p>Met with over 30 importers and retailers at Gulfood and during the study tour.</p>	<p>Outlets visited in:</p> <p>Dubai (Feb 16): Carrefour, Spinneys, Union Coop, Lulu Hypermarkets , Choithrams</p> <p>Abu Dhabi (Feb 21): Lulu Hypermarkets, Choithrams, Abu Dhabi Coop, Spinneys, Sultan Center</p> <p>Manama (Feb 23): Macro Mart, Alosra Supermarket, Lulu, Mega Mart, Al Jazira Supermarket, Tamimi Markets</p> <p>Muscat (Feb 25): Hypermax, Al Meera Hypermarket, Sultan Center, Spinneys, Lulu</p>	Achieved

		Hypermarket	
<p>2025 – Insights and market competition knowledge were generated during the study tour</p>	<p>A report produced contains detailed information including;</p> <ul style="list-style-type: none"> • Supermarkets visited in each of UAE, Bahrain and Oman • Business matching in each country • Buyer introductions at Gulfood • The GCC Market Visit Perspectives article 	<p>Produced an article that includes key economic statistics, GCC demographic information and observations from the market.</p> <p>Appendix F and G</p>	<p>Achieved</p>

Monitoring and evaluation

As this was a short-term, two-year project, no formal Monitoring & Evaluation (M&E) Plan was established. However, key evaluation questions were used to assess the overall project performance and guide future improvements.

Table 3. Key Evaluation Questions

Key Evaluation Question	Project performance	Continuous improvement opportunities
How effectively has the project communicated with the wider industry?	Insights were communicated through multiple channels for this project including a pre-departure webinar, social media posts, and articles in Talking Avocados. Regular updates were also shared via Export Connect.	<ul style="list-style-type: none"> - Expand reach through video-based and short-form social content - Host post-tour workshops or exporter case studies - Share insights via the BPR portal and Export Market Intelligence Portal
Were the planned activities and intended outcomes delivered?	<p>All key activities were delivered as intended, including visits to multiple cities, retailer and importer meetings, and participation in Gulfood .</p> <p>Outcomes aligned with the project's goals of generating market insights and building trade relationships in the GCC region.</p>	<ul style="list-style-type: none"> - Include follow-up engagement with buyers to support relationship conversion - Facilitate seasonal planning dialogues with key retailers - Explore foodservice and e-commerce channel inclusion in future programs
What feedback was received from participants?	Delegates and participants reported strong value from the in-market experience	<ul style="list-style-type: none"> - Collect structured feedback via post-tour surveys/interviews - Embed pre-export training and market briefings into future programs

Recommendations

Based on the findings, industry feedback, and observed market dynamics across the 2024 and 2025 GCC tours, the following recommendations are made to support the continued growth of Australian avocado exports to the Middle East and ensure the broader industry benefits from the project's outcomes:

Key recommendations include:

- **Strengthen Export Readiness:** Businesses intending to supply the GCC should invest in understanding the respective market conditions and trends, key competitors, and buyer expectations. Pre-export training and market briefings should be embedded into exporter development pathways.
- **Build and Maintain Buyer Relationships:** Exporters should continue engagement with the retailers and importers met during the study tours to convert initial introductions into long-term trading relationships. Seasonal planning discussions should be prioritised to facilitate consistent shipments.
- **Invest in Market Promotion:** Industry must support the development of in-market marketing and education campaigns highlighting the premium quality, food safety, and sustainability credentials of Australian avocados to drive consumer awareness and pull-through demand. Similarly, joint promotional activities and investments should be made to support key partners and committed buyers.
- **Target Foodservice and E-Commerce Channels:** Future activities should include engagement with emerging channels such as online grocery platforms and the foodservice sector, which are growing rapidly in the GCC region.
- **Continued Competitor Intelligence:** Undertake a comparative analysis of competing avocado suppliers (e.g., Kenya, Peru, South Africa) to understand their market advantages and identify how Australia can differentiate its offer.
- **Knowledge sharing:** Maintain and expand communication of market insights through industry platforms such as the BPR portal, Avocados Export Market Intelligence Portal, webinars and social media. Consider hosting post-tour workshops or case studies from participating exporters.

References

Avocados Australia (2024). *Export Development Program*. Retrieved from <https://avocado.org.au/our-programs/export-development/>

Hort Innovation (2022). *Avocado Strategic Investment Plan 2022–2026*. Retrieved from <https://www.horticulture.com.au/globalassets/hort-innovation/levy-fund-financial-and-management-documents/sip-2022-2026-pdfs/hort-innovation-sip-2022-26-avocado.pdf>

Hort Innovation (2022). *Avocado Export Strategy 2022–2026 (AV21000)*. Retrieved from <https://www.horticulture.com.au/growers/help-your-business-grow/research-reports-publications-fact-sheets-and-more/av21000/>

Appendices

Appendix A – 2024 Gulfood and the Middle East study tour itinerary

Friday 16/02

Arrive in Kuwait and rest

Saturday 17/02

Morning/Afternoon – Kuwait supermarket tour including:

- Al Forda Central Fruit & Vegetable Market
- Sultan Center
- Carrefour
- City Center
- Lulu Hypermarket

Evening – Dinner/tourist activity

Sunday 18/02

Morning – B2B meetings in Kuwait

3 x meeting. Targets include:

- Suma Fruits International (importer/wholesaler)
- Kuwait Agro (importer/wholesaler)
- The Sultan Center (retailer)
- Lulu Hypermarket (retailer)

Afternoon – Depart Kuwait for Dubai

Evening – Supermarket tour at Dubai Mall followed by dinner. Outlets include:

- Grandiose
- Waitrose

Monday 19/02

Morning/Afternoon – Attend Gulfood and commence B2B meetings with target customers including:

- Barakat
- Fresh Fruits Company
- NRTC Group
- Pan Fresh International Trading
- Elite Agro
- Miermag Trading
- Fresh Express
- Lulu Hypermarkets
- Choithrams
- Spinneys
- Grandiose
- Al Maya
- Kibsons

Evening – Supermarket tour in Jumeirah followed by dinner. Outlets include:

- Choithrams
- Spinneys

Tuesday 20/02

Morning – Visit Fruit & Vegetable Market

Afternoon – Continue B2B meetings (as per Monday schedule)

Evening – Supermarket tour followed by dinner. Outlets include:

- Carrefour
- Lulu Hypermarket Festival City

Wednesday 21/02

Morning/Afternoon – Continue B2B meetings (as per Monday schedule)

Evening – Flex time for optional store visits or dinner with buyers (based on meeting outcomes)

Thursday 22 February 2024

Morning/Afternoon – Continue B2B meetings (as per Monday schedule)

Evening – Flex time for optional store visits or dinner with buyers (based on meeting outcomes)

Friday 23/02

Morning – Attend Gulfood

Afternoon – Depart Dubai for Jeddah

Evening – Dinner/tourist activity

Saturday 24/02

Morning/Afternoon – Jeddah supermarket tour followed by dinner. Outlets include:

- Danube
- Manuel
- Tamimi
- Panda
- Lulu Hypermarkets

Sunday 25/02

Morning – B2B meetings in Jeddah

3 x meetings to be finalised week commencing 5 February. Target customers include:

- Sharbatly Fruits
- Francais Food
- Best Vision
- Al Haramla Trading
- Waha Fruits
- Lulu Hypermarkets
- Manuel
- Danube

Afternoon – End of trip.

Appendix B – 2024 list of stores and business meetings included in the study tours

SUPERMARKETS VISITED

Supermarket Tour: Sunday 18th Feb

WAITROSE
& PARTNERS

Waitrose



Grandiose



Carrefour



Lulu Hypermarket

Choithrams

Choithrams



EXPORT CONNECT BUYER INTRODUCTIONS AT GULFOOD



Al Bakrawe
Mohameed Khadeeb



Al Jazira (Bahrain)
Keith Dias



Al Maya
Sanju Sheik
Frederick Hosanna



Al Osra (Bahrain)
Pierre Kozhaya



Barakat
Ahmad Naveed
Siddharth Gupta



Carrefour
Luke Christopher Hinsley



Choithrams
Ajay Shirke



Francaise Food (Saudi Arabia)
Samer Mahmoud Al-Awaj



Grandiose
Carlos Bermudez
Ashley Galling
Omar Al Yousef



Luca Zara
David O'Brien



Lulu Hypermarkets
Santosh Mathew



Muntazah Markets (Saudi Arabia)
Jaffar Al Asfoor



NRTC Group of Companies
Adnan Al Rafae



SAFCO International
Muhammed Siyad



Spinneys
Neil Gibson



Tamimi Markets (Saudi Arabia)
Carlos Medellin



NSK Fruits & Vegetables
Ravindra Laxman Deshmukh

SUPERMARKETS VISITED

Supermarket Tour: Friday 23rd Feb



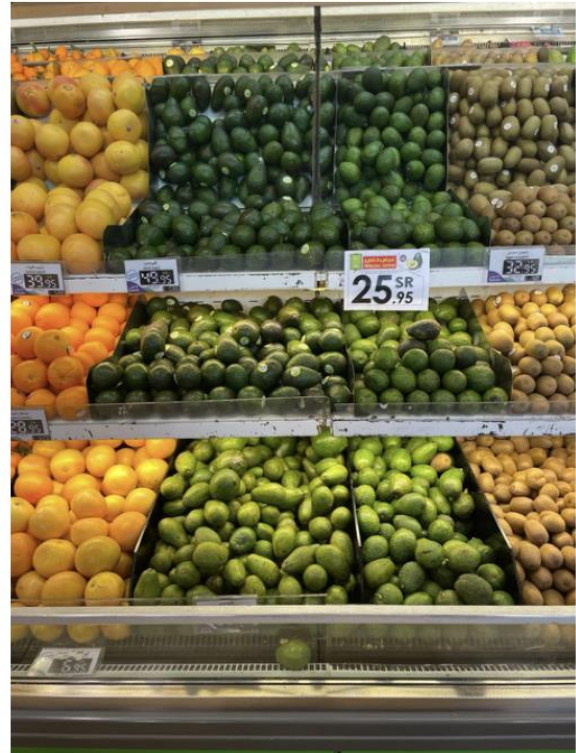
Danube



Lulu Hypermarkets



Manuel



BUYERS MET



Danube
Abdylrazek Saad



Lulu Hypermarkets
Rizwan Razak



Manuel
Abdul Rahman Asif
Usman I.



Sharbatly Fruits
Ibrahim Youssef

Appendix C – 2024 Communication summary

Email Notices:

Export Notice - Middle East Briefing Webinar - RSVP now! - 6/2/2024 - 170 recipients, Open rate 50%,



Middle East Briefing Webinar - RSVP now!

Recently over 500 tonnes of Australian avocados were exported to the Middle East which is a 440% increase from the previous year. Find out more about this exciting developing market by taking part in a **Middle East Briefing Webinar** happening this **Thursday, 8 Feb. from 11am to 12pm (AEST)**. The webinar will cover:

- Market comparison snapshots across UAE, KSA and Kuwait - including economic, demographic and consumer trends
- Avocado category snapshot - including retail value and volume across each market
- Trade data across each of these markets
- Channel trends
- In-store videos and online competitor reviews, including price points and country of origin
- Outbound and study tour: Pre-departure briefing for grower market visits to these markets

RSVP NOW to Flora Zhang, email export@avocadusocial.org.au

The Avocado market access and trade development (AV2004) project has been funded by Hort Innovation, using the Avocado research and development levy and contributions from the Australian Government. Hort Innovation is the grower-owned, not-for-profit research and development corporation for Australian horticulture.

A fruitful trip to the GCC for Aussie avocados

By Flora Zhang, Hort Innovation

On the back of the 2023 Avocado Global Trade to February 2024, Hort Innovation's market access project continues to make a difference to the avocado industry. In 2023, the project supported a range of activities, including a briefing webinar for growers and exporters, a trade mission to the Middle East, and a trade mission to the GCC. The project also supported a range of activities, including a briefing webinar for growers and exporters, a trade mission to the Middle East, and a trade mission to the GCC. The project also supported a range of activities, including a briefing webinar for growers and exporters, a trade mission to the Middle East, and a trade mission to the GCC.



20 www.avocadusocial.org.au 15/10/2024

- **Guacamole:**

Articles:

"Export Events coming up - Register your interest NOW!" - 12/1/2024 <https://mailchi.mp/avocado/guac-15846808?e=3597b7eefc#Exportevents12>

"Export Events - Register your interest NOW!" - 25/1/2024 <https://mailchi.mp/avocado/guac-15848040?e=3597b7eefc#Exportevents25>

"Australian Avocados' trade display a hit at Gulfood" - 23/2/2024

- **AAL Website - Upcoming Events:**

Gulfood Event Listing up from early January 2024

- **Talking Avocados Magazine:**

Autumn 2024 issue - page 20

[http://avocadsocialmedia.org.au/wp-content/uploads/2024/04/AVO6506 TalkingAvocados Autumn24 FA Web 2.pdf](http://avocadsocialmedia.org.au/wp-content/uploads/2024/04/AVO6506_TalkingAvocados_Autumn24_FA_Web_2.pdf)

- **Social media – Facebook & LinkedIn posts**



Avocado Australia Limited

1,176 followers

2mo • 🌐

Australian Avocado's trade display is attracting attention at Gulfood 2024 this week. Gulfood is running from now until the 23 February at the Dubai World Trade Centre and is regarded as the largest annual global food and beverage sourcing event in the world. The event brings together food and beverage communities from over 190 countries.

There are 127 National pavilions with Australia being well represented. Over 5,500 exhibiting companies are present. Over 136,000 visitors had pre-registered to visit the trade show. 89% of exhibitors are international (outside the United Arab Emirates (UAE)). So, this show is not just about promoting to the UAE, it's a show that has great potential to launch products in many global destinations. Over 170 events will also be happening across this week.

Australian Avocado's attendance at Gulfood was made possible through the Avocado export development and market access (AV2020) project. A project that has been funded by Hort Innovation using the avocado research and development levy and contributions from the Australian Government. Hort Innovation is the grower-owned, not-for-profit, research and development corporation for Australian horticulture.

Avocado Australia Limited Hort Innovation
 #ExportingIsBusiness #Exporting
 #AustralianAvocados #growinggoodnature
 Flora Zhang Tracy Aspinall Richard Magney John Tyas





Australian Avocado's trade display a hit at Gulfood

Australian Avocado's trade display attracted attention at Gulfood 2024 this week. Gulfood ran all this week at the Dubai World Trade Centre and is regarded as the largest annual global food and beverage sourcing event in the world. The event brings together food and beverage communities from over 190 countries.

There are 127 National pavilions with Australia being well represented. Over 5,500 companies exhibited. Over 136,000 visitors had pre-registered to visit the trade show. 89% of exhibitors are international (outside the United Arab Emirates (UAE)). So, this show is not just about promoting to the UAE, it's a show that has great potential to launch products in many global destinations. Over 170 events also took place across this week.

Appendix D – 2024 GCC Market Visit Perspectives

Off the back of the 2023 Avocado Global Tour, Australian Avocado Growers recently participated in a market visit to the Gulf Cooperation Council (GCC) region. Last year's programme was a huge success, culminating in leading regional retailer Lulu Hypermarket selling over 300 tonnes of Aussie avocados across the GCC region. And growth prospects are looking even more promising for 2024, with this figure to be tested over the next 12 months as Australia solidifies its position as a leading premium avocado exporter to the GCC.

This year, the programme involved a visit to Kuwait, the United Arab Emirates (UAE) and Saudi Arabia as well as a chance for growers to exhibit at Gulfood 2024—the world's largest annual food and beverage sourcing event showcasing over 5,500 F&B brands and 150,000 products from more than 90 countries. Over the course of the trip, avocado growers were given the opportunity to visit supermarkets and produce markets on-the-ground, and meet with buyers from key F&B retailers – both in their offices and at Gulfood. This allowed the growers to gain a unique first-hand insight into the market and build connections with prospective buyers to develop a thriving export strategy. Now let's take a closer look at the export opportunity for Australian avocados in the GCC region!



Business in the Middle East is concentrated within the GCC region. Established in 1981, the GCC is a political and economic alliance of six countries (Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the UAE) designed to unite members based on common objectives including strengthening regional coordination and economic ties. The alliance encompasses over 58 million people and is responsible for 1.7% of the world's GDP, with The World Bank forecasting the GCC's GDP to triple by 2050—signifying extraordinary trade potential.

Meanwhile in Australia, avocados are on a strong growth trajectory with Austrade forecasting production to increase by 50% over the next four years.

Combined, these statistics demonstrate a significant opportunity for Australian avocados in the Middle East, further supported by the fact that Middle Eastern consumers are becoming increasingly health-conscious and selective in their food choices. This has seen a shift towards consuming more fresh fruit and vegetables, with avocados especially viewed as a superfruit thanks to their strong nutritional benefits as a source of healthy fats, vitamin E and folate.

Further, the avocado market in the GCC is extremely diverse, with a wide range of avocados imported from Africa, South America and Europe. While Kenya is currently the dominant source market supplying the GCC with close to US\$20 million in avocados annually, the landscape is rapidly changing as source markets like Mexico become top suppliers. Australian avocados currently maintain a relatively small share of the market, but are becoming a strong competitive force, rivalling Mexican avocados with their premium positioning and increasing popularity.

Now, let's explore a few highlights from the trip! This year, three enthusiastic Australian avocado growers made their way to the GCC. It was great to see two of these companies returning from last year's trip, with both having spent the last 12 months focused on growing their export presence to the Middle East. It was especially exciting to note their observations that the Australian avocado scene has grown over the past year and has great potential moving forward!

The first stop was Kuwait – a market with a relatively small population of just over four million people but growing potential. Kuwait represents approximately 7.00% of the GCC's GDP, with an annual economic growth rate of 3.60% in 2023. It's the 47th largest importer of avocados globally, with most imports coming from the UAE. Yet the population is young, with over one third of the population aged below thirty. During the growers' visit to Kuwait from the 16th of February, the group participated in supermarket



walk-throughs in Monoprix, City Centre, Sultan Centre and Lulu Hypermarkets to gather an understanding of the products available in the market. Growers also met with retailers and distributors including Sultan Centre, Suma Fruits International and Lulu Hypermarkets.

After Kuwait, the group ventured to Dubai in the UAE – the second largest economy in the GCC responsible for around one quarter of the GCC's total GDP. The UAE is considered an extremely prosperous market, with economic growth almost reaching 8.00% in 2022. As such, it's no surprise that the country is the GCC's largest avocado importer, and the 18th largest globally. Consumers in the UAE are urban, high-income and health-conscious—the perfect combination for Australian exporters. When the growers arrived in the UAE, they joined the Australia networking event that was co-sponsored by Horticulture Innovation Australia and included a speech from Mr Ridwaan Jadwat, Australia's Ambassador to the UAE.

Following this, the growers were off to day one of Gulfood on the 19th of February, where they exhibited on the Avocados Australia stand.

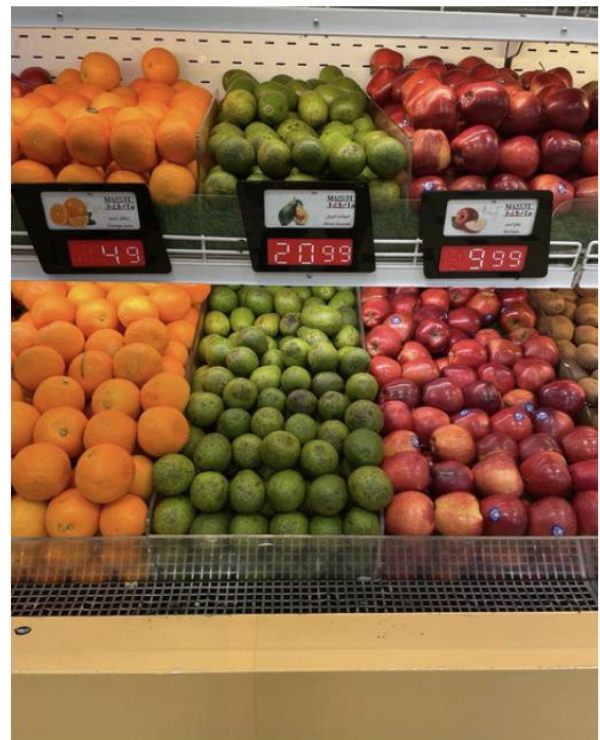
Many retail and distribution buyers stopped by at the stand, while the growers also visited the stands of potential customers including Choithrams, AlMaya, Grandiose and Barakat Fresh. The stand proved to be a great success, prompting many enquiries from interested buyers with the growers expecting to seal several new export relationships going forward. Whilst in Dubai, the growers also completed a few more supermarket visits of Waitrose, Grandiose, Carrefour, Lulu Hypermarket and Choithrams, where they learnt that Kenya, Mexico and Rwanda were key source markets for avocados.



The final stop was Jeddah, Saudi Arabia. As the largest economy in the GCC, Saudi Arabia is an economic powerhouse and one of the top 20 largest economies around the globe. Economic growth has been impressive over the last few decades, built on the country's strong oil exports.

During their time in Jeddah, the growers undertook a few more supermarket visits of leading banners including Manuel, Danube, Carrefour and Lulu Hypermarkets – where they learnt that Kenya and Mexico were key avocado source markets – before meeting with buyers from Manuel, Danube, Lulu Hypermarkets and the largest fresh distributor in Saudi Arabia, Sharbatly.

All in all, the 2024 GCC visit proved to be incredibly fruitful! The growth of Australia's avocado industry alongside the rising prosperity within GCC markets is a recipe for success, proven by the immense interest in Australian avocados that was evident during the most recent trip. A considerable rise in avocado exports is forecast for 2024 as the growers follow-up on the leads and relationships developed on the trip to further their export journey and expand their horizons.



Appendix E – 2025 Gulfood and the Middle East study tour itinerary

Saturday 15/02

Arrive in Dubai and rest

Sunday 16/02

Morning/Afternoon – Dubai supermarket tour and B2B meetings including:

- Carrefour (incl. B2B meeting)
- Lulu Hypermarket (incl. B2B meeting)
- Choithrams (incl. B2B meeting)
- Spinneys
- Union Cooperative

Afternoon – Visit to Dubai World Trade Centre for final Gulfood preparations

Evening – Dinner/tourist activity

Monday 17/02

Morning – B2B meeting with Desert Harvest

Whole day – Gulfood Trade Show

Tuesday 18/02

Whole day - Gulfood Trade Show

Wednesday 19/02

Whole day – Gulfood Trade Show

Afternoon – B2B meetings with Choithrams and Abu Dhabi Food Hub

Thursday 20/02

Morning – Visit Al Aweer Fruit & Vegetable Market

- Visiting Ammar Albakri Trading
- Visiting Fresh Connection
- Visiting Kazi and Son
- B2B meeting with Fresh Fruit Company
- B2B meeting with Lucazara
- B2B meeting with Kibsons
- B2B meeting with Barakat

Afternoon – Meeting with Noon

- Departing for Abu Dhabi

Night – Rest and dinner

Friday 21/02

Morning/Afternoon – Abu Dhabi supermarket tour including:

- Lulu Hypermarket
- Choithrams
- Abu Dhabi Cooperative
- Spinneys

Evening – Group dinner

Saturday 22/02

Morning/Afternoon – Group tour

Evening – Flight to Bahrain

Sunday 23/02

Morning/Afternoon – Bahrain (Manama) supermarket tour including:

- Macro Mart
- Al Osra Supermarket
- Lulu Hypermarket
- Mega Mart
- Tamimi Markets

Afternoon – B2B meeting with Tamimi Market

Evening – Group dinner

Monday 24/02

Whole day – 4 x B2B meetings

- Al Jazira
- Mega Mart Babason
- Al Osra
- Lulu Bahrain

Evening – Flight to Oman

Tuesday 25/02

Whole day – Oman (Manama) supermarket tour and B2B meetings including:

- Lulu Oman
- Al Meera
- Sultan Centre

Evening – End of trip

Appendix F – 2025 List of stores and business meetings included in the study tours

Dubai Supermarkets Visited

Supermarket Tour: Sunday 16th Feb



Carrefour



Lulu



Spinneys



Choithrams



Union Coop



Export Connect Buyer Introductions at Gulfood



Al Maya
Frederick Hosanna



Barakat
George Joseph Rodrigues



Choithrams
Ajay Shirke



Desert Harvest
Mohammad Ali



Fresh Fruit Company
Faizal Muchundiyagm



Kibsons
Jonathan Bergstrom



Lucazara
David O'Brien



Lulu Hypermarkets
Anoop Vijayan Rema



Abu Dhabi Supermarkets Visited

Supermarket Tour: Friday 21st Feb



Lulu



Choithrams



Abu Dhabi Coop



Spinneys



Sultan Center



Bahrain Supermarkets Visited

Supermarket Tour: Sunday 23rd Feb



Macro Mart

الأسرة Alosra

Alosra Supermarket



Lulu



Mega Mart



Al Jazira Supermarket



Tamimi Markets



Buyers Met in Bahrain



Al Jazira
Keith Dias



Mega Mart Babason
Nimesh Kewalramani

الأسرة Alosra

Alosra
Pierre Kozhaya



Lulu Bahrain
Mr Uthaman



Tamimi Markets
Saif Nasseem & Jaffar Al Asfoor



Oman Supermarkets Visited

Supermarket Tour: Tuesday 25th Feb



Hypermax



Al Meera Hypermarket



Sultan Center



Spinneys



Lulu



Buyers Met in Oman



Lulu Oman
Mr Safin



Al Meera
Danish Raza



Sultan Centre
Roy Azzi

Appendix G – 2025 GCC Market Visit Perspectives

Building upon the notable successes achieved during the 2023 and 2024 market visits to the GCC, Avocados Australia returned to the Gulf Cooperation Council (GCC) region in 2025 to further strengthen its position in this increasingly significant export market. These previous visits facilitated Australian avocados being listed in prominent retail chains such as Lulu Hypermarkets and Spinneys, marking a key milestone for the Australian avocado industry. Leveraging these previous successes, this year's market visit expanded further into the United Arab Emirates (UAE), Bahrain, and Oman, alongside active participation in Gulfood 2025.

Gulfood, recognized as the world's largest annual food and beverage trade exhibition, continues to serve as an essential gateway into Middle Eastern markets. The event, showcasing more than 5,500 food and beverage brands and over 150,000 products from over 100 countries, presented Australian growers with unmatched opportunities to engage directly with influential buyers. Throughout the duration of Gulfood, the Australian avocado delegation conducted productive meetings both at the Avocados Australia stand and during targeted visits to the offices of key retail and distribution partners. Visits to regional supermarkets, hypermarkets, and produce markets further enriched the growers' understanding of the competitive landscape and consumer preferences, enabling the strategic refinement of export strategies tailored specifically for GCC consumers.



Successfully doing business within the Middle East requires an appreciation of the strategic importance and unique economic dynamics of the GCC region. Established in 1981, the GCC is a political and economic alliance consisting of six member states: Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the UAE. Designed to foster regional cooperation and economic integration, the GCC collectively represents a population of over 58 million and accounts for approximately 2% of global GDP.

Notably, The World Bank anticipates that GCC economies will triple their current GDP by 2050, highlighting an extraordinary potential for sustained trade growth and economic expansion.

Within Australia, the avocado sector continues its impressive growth trajectory. The 2023/24 export season saw a remarkable 106% increase in avocado exports compared to the previous year, representing approximately 14.5% of the country's total avocado production. Concurrently, domestic production expanded significantly, posting a 30% growth rate within the same period. With Australian production predicted to maintain steady growth over the coming years, the export opportunities presented by expanding GCC demand will be pivotal in shaping the industry's future.

Consumers in the GCC are increasingly focused on health-conscious dietary choices, driving sustained demand for fresh produce, particularly avocados. Avocados have secured their position as a highly sought-after superfood, largely owing to their nutritional profile, which includes essential nutrients such as healthy fats, vitamin E, and folate. As health awareness expands among GCC consumers, the demand for premium-quality avocados is expected to rise even further, solidifying avocados as an essential component of the region's fresh produce market.

The avocado market within the GCC remains diverse, with produce sourced from numerous international markets including Africa, South America, and Europe. Currently, countries like Kenya and Mexico dominate imports into the region. Nevertheless, Australian avocados, though maintaining a modest market share, have significantly elevated their competitive positioning by emphasising premium quality, consistent supply, and outstanding freshness.

These distinguishing characteristics have allowed Australian avocados to rival Mexican products, increasingly preferred by discerning consumers seeking quality assurance and premium produce experiences.

The substantial growth of Australian avocado exports to the region highlights the robust potential of the Middle Eastern market, driven by Australia's reputation for exceptional product quality, reliable supply chains, and strong branding.



The delegation began its visit in Dubai, the commercial hub of the UAE and the GCC's second-largest economy, representing just over 25% of the total regional GDP. Dubai's economy has displayed remarkable resilience, averaging 3.2% annual growth over the past decade, underscoring its status as one of the region's most stable and prosperous markets.

The UAE remains the leading avocado importer within the GCC, characterised by a cosmopolitan and largely expatriate population - approximately 90% - Dubai boasts a sizeable middle-class demographic, highly attuned to trends in health and nutrition. This demographic profile is ideal for Australian avocados, aligning perfectly with consumer demand for premium fresh produce.

The group's activities included supermarket visits to key retailers such as Carrefour, Choithrams, Waitrose, Lulu Hypermarkets, and Spinneys, in addition to fruitful meetings with procurement teams at these influential retail chains. Growers reported strong interest from UAE buyers, reflecting the continued upward trajectory for Australian avocado exports into this important market.

Following an exceptional experience in the UAE, the group visited Bahrain, a market distinguished by its strategic location and growing economic momentum. Despite being the smallest GCC country in terms of population (approximately 1.5 million people), Bahrain continues to achieve consistent economic growth, averaging 2.9% annually over the past decade and 3.0% in 2024 alone.

Bahrain is currently ranked as the 61st largest importer of avocados worldwide, with nearly half (46%) of its avocado imports sourced from Mexico. The Bahraini market is marked by a youthful, tech-savvy population, increasingly reliant on digital technologies and online platforms for daily tasks, including grocery shopping and fresh produce selection. This demographic feature presents unique opportunities for targeted digital marketing strategies and innovative e-commerce solutions to grow Australian avocado sales.

Meetings in Bahrain focused on exploring new retail channels and strengthening distributor relationships, presenting potential for deeper market penetration.



Concluding the tour, the delegation visited Oman - the GCC's second-smallest economy but one displaying promising growth prospects. Oman is currently the 59th largest importer of avocados globally, sourcing approximately 65% of its avocado imports from the UAE and another 22% from Qatar.

The Omani market exhibits growing consumer awareness around health and wellness, increasingly favouring fresh, organic, and premium produce offerings. Retailer meetings and market visits underscored strong local interest in diversifying avocado supply sources, presenting immediate opportunities for Australian avocados to fill demand gaps, especially given Australia's growing reputation as a reliable supplier of premium-quality produce.

Overall, the 2025 GCC market visit demonstrated the extraordinary potential for Australian avocado growers to expand and solidify their market presence in the region. Encouraged by steadily growing consumer demand for fresh produce and the GCC's robust economic outlook, Australian avocado producers are exceptionally well-positioned to capture a greater market share in the coming years.

The insights and relationships developed during this visit, particularly at Gulfood 2025, will provide a solid foundation for future market entry and expansion strategies, ensuring ongoing success for Australian avocados across the GCC region.

