

UNITED ARAB EMIRATES

DUBAI

KEY STATISTICS



LAND AREA
83,600 km²



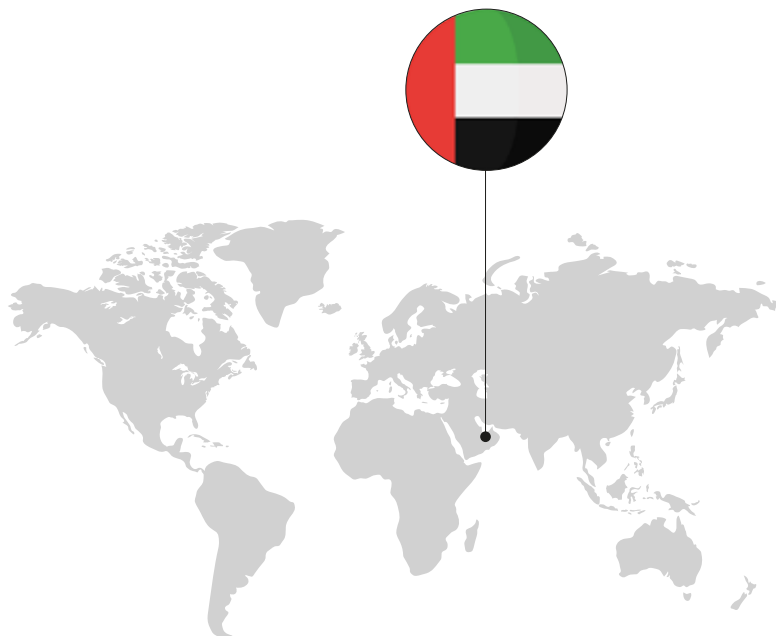
CAPITAL CITY
ABU DHABI



LANGUAGES
ARABIC



CURRENCY
UAE DIRHAM (AED)



- UAE relies on agrifood imports for 90% of its food requirements
- Bilateral relations between Australia and the UAE are friendly, multi-faceted and growing rapidly
- They are underpinned by extensive trade relations, and the UAE is Australia's largest Middle East trade and investment partner
- UAE offers a liberal and business-friendly environment, as well as one of the most stable and safest markets in the region
- Biggest city is Dubai (1,137,347 people) followed by the capital city, Abu Dhabi (603,492 people)

TOTAL POPULATION **9.5m**

POPULATION DENSITY RANKED **#96 IN WORLD AT 114 PER km²**

MEDIAN AGE **33.5 YEARS**

94% URBAN

ETHNICITY: 12% EMIRATIS | 88% EXPATRIATES
>200 NATIONALITIES LIVING & WORKING IN UAE

ECONOMY

- UAE is one of the most globalised economies in the world with over 30 bilateral investment treaties and membership of the World Trade Organisation
- The Middle East's third largest economy, and one of the wealthiest countries in the region on a per capita basis with GDP in 2022 estimated at US\$508 billion
- Ranked no. 16 on 'Ease of Doing Business Index' globally

POLITICAL ENVIRONMENT

- A Federation of seven autonomous Emirates
- Governed as an absolute Islamic (Sunni) monarchy with a President who is officially elected every 5 years by the Federal Supreme Council, but because the ruler of Abu Dhabi customarily also holds the presidency of the UAE, the office is de facto hereditary
- The head of government is the Vice President and Prime Minister

CONNECTIVITY

- UAE's strong logistics network is ranked 11th in the world
- UAE is home to an advanced system of warehouses and a sophisticated transportation infrastructure, which ensures good connectivity and quick and efficient transportation within the country, between ports and free-trade zones
- Direct flights operate daily via Emirates from Adelaide, Perth, Sydney, Melbourne and Brisbane

2024 CULTURAL HOLIDAYS (Note: Islamic holidays are determined according to moon sighting)

- New Years Day 1 January
- Eid Al Fitr from 29 Ramadan to 3 Shawwal 1445 AH (4 days)
- Arafah day & Eid Al Adha (Feast of Sacrifice) from 9 to 12 Dhu al Hijjah 1445 AH (4 days)
- Hijri New Year (Islamic New Year) 1 Muharram 1446 AH
- Prophet Mohammed's birthday 12 Rabi' Awwal 1446 AH
- National Day 2 & 3 December (2 days)

THE DUBAI CUSTOMER

UAE consumers are categorised by income level as well as nationality origin

- High-earners are increasingly interested in healthy eating, which is driving demand for organic produce and superfoods, such as kale and berries, regardless of price
- Low-income expatriate workers have showed price-conscious behavior in recent years, which strengthened demand for staple products as well as discounted items
- Health awareness, increasing demand for convenience, and a more conscientious spending approach in the face of the current economic situation have shaped consumption of fresh produce in terms of type, quality and pricing in recent years



UNIQUE DEMOGRAPHIC

Only 27.8% of the UAE's population is female yet women influence 80% of all purchases in Dubai
88% of the population come from a nation other than UAE



IMPRESS ME

Consumers expect brands to connect with them personally and treat them as individuals
UAE shoppers have high expectations and earning their loyalty can be a challenge but they are loyal to their favorite brands, with 34% saying they'd buy from their favorite brands, no matter the cost






LUXURIOUS LIVING

UAE citizens spend around 30% of their monthly salaries on luxury goods
Foreign products account for 58% of all UAE purchases

Source: Wordbank Market Insights

BERRY TRADE 2022

In 2022, Australia only recorded 49 tonnes of Strawberry exports to the UAE - no Rubus or Blueberry shipments took place

Exporter Country	2022 Share %	5yr avg Share %	Total Volume Imported
Egypt	40.1	38.0	 11,666 tonnes HS081010
USA	16.3	21.5	
South Africa	13.1	7.5	
Morocco	9.6	9.6	
UK	4.3	1.9	
USA	25.9	39.4	 2,936 tonnes HS081020
Mexico	25.0	25.1	
South Africa	15.1	7.3	
Peru	10.7	6.9	
Portugal	6.7	2.4	
South Africa	32.9	26.6	 3,103 tonnes HS081040
Morocco	24.5	11.4	
Peru	10.9	7.6	
Zimbabwe	8.4	5.2	
Mexico	5.5	9.1	

SUPPLY CHAINS

MAINSTREAM RETAIL

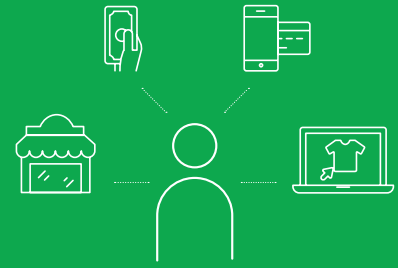
The UAE's well-developed, modern retail infrastructure ensures a diverse portfolio of fruit and vegetables as well as prices

- Most supermarkets and hypermarkets as well as leading importers have established relationships with suppliers from around the globe to ensure year-round supply
- Dubai is also home to the Al Aweer Central Fruit and Vegetable Market, the heart of fresh fruit and vegetable trade in the country



DUBAI CONSUMERS ARE HEAVY ONLINE SHOPPERS

- 53% use online grocery delivery services weekly and rely on food delivery apps more than consumers in other cities in the Middle East
- 71% of Middle East consumers purchase at least some of their groceries online, and a third make microtrips to the grocery store or supermarket daily or more frequently
- When it comes to delivery, shoppers expect instant gratification and are willing to pay for 0-2 hour delivery
- Still expect a good in-store experience and malls are becoming lifestyle destinations



FOOD SERVICES

- Dubai recorded its highest ever annual tourist arrivals in 2023, attracting 17.15 million international overnight visitors
- The multiculturalism of the country's expat community has resulted in diverse eating habits and a large foodservice sector offering a variety of cuisines, hence there is a diverse demand-structure within fresh produce
- There are 26,795 cafes and restaurants in Dubai
- QSR is the largest channel in the UAE foodservice profit sector by revenue, representing 40.4% of total sector
- The accommodation channel is the second most prominent channel, with a market share of 19.2%

OPPORTUNITIES

The combination of diversity in demand and a structured supply side makes the UAE an interesting market for fresh fruit and vegetables and presents opportunities for suppliers of high quality produce

The UAE is a captive market where consumers are willing to look at and try new products and value international brands

Health awareness and demand for sustainability have boosted growth for fresh fruit and vegetables

The health food sector has also grown a lot, and Australian organic products are trending and selling well, with government initiatives to increase health awareness among UAE consumers introduced in 2016

ECOMMERCE

In 2022, the top online grocery stores were:



Kibsons specialises in fresh produce



- Many online grocery stores offer subscription services
- 53% use online grocery delivery services weekly

CHALLENGES

A reliance on agrifood imports for 90% of its food requirements means UAE is an intensely competitive market

Exporters need to differentiate themselves with a unique offering and a premium consumer proposition

Growing demand for convenience holds risks and opportunities for fresh produce

The major supply markets of Egypt and Morocco have a strong proximity and language advantage

TIPS FOR SUCCESS

✓ The presentation and packaging of your product is extremely important

✓ The retail sector in UAE is very visually appealing

✓ It is beautifully fitted out and well merchandised by a strong cohort of attentive and trained staff

✓ Fresh food must look its very best to obtain premium pricing in UAE

✓ In-store promotions are a very effective way to cut-through in the market place