

Final report

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Enhancing Melon Export Opportunities to Gulf Countries

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Contents

Public summary	4
Keywords	5
Introduction	6
Methodology	7
Results and discussion	8
Outputs	10
Outcomes	12
Monitoring and evaluation	14
Recommendations	15
Intellectual property	17
Appendices	18

Public summary

This project was undertaken to support the Australian melon industry to better understand, access, and engage with priority Gulf Cooperation Council (GCC) markets, particularly the United Arab Emirates (UAE). While the region is a high-consumption market for fresh produce and the UAE is Australia's highest-value melon export destination, the presence of Australian melons remains relatively limited across the UAE's retail and wholesale sectors. The project aimed to improve market understanding, strengthen exporter readiness, and facilitate direct engagement with in-market buyers to support future demand creation.

Delivered by Export Connect in partnership with Melons Australia and Hort Innovation, the project combined targeted market research, exporter preparation, and an in-market engagement program linked to Gulfood, one of the world's largest food and beverage trade events. Three Australian industry participants took part in the market visit program.

Prior to the market visit, Export Connect developed and shared a comprehensive set of market research reports and preparatory resources. These included a detailed UAE Market Insights Report covering market structure, retail channels, the fresh fruit category, and market access considerations. To support analysis of competitive positioning, the project also delivered an online competitor review across GCC retail and e-commerce platforms, and an in-store competitor review based on store visits in the UAE. These materials provided participants with clear insights into pricing, formats, country-of-origin positioning, and merchandising of melon products in market.

Exporter preparedness was further supported through a Market Visit Information Pack and pre-departure briefing materials, which addressed business etiquette, engagement protocols, and practical considerations for meetings with importers and retailers.

The in-market program was delivered over five days in January 2026, immediately prior to Gulfood. On Sunday 25 January, participants undertook a guided supermarket tour across leading UAE retail chains, meeting with store managers and category or head office representatives and walking store floors to understand melon ranging and positioning. On Monday 26 January, the group visited the Al Aweer wholesale market, where meetings were held with a wide range of importers, wholesalers, and vertically integrated suppliers servicing the UAE and broader GCC's retail, foodservice, and wholesale channels. These engagements provided direct feedback on buyer requirements, logistics considerations, and seasonal sourcing patterns. The group then attended Gulfood for further buyer engagement.

Across the market visit and trade show program, Export Connect facilitated introductions and discussions with numerous importers, distributors, and retailers operating across the UAE and wider GCC region. While no commercial outcomes were claimed at this stage, the project successfully increased buyer awareness of Australian melons and provided exporters with practical insights into how the category performs in market.

The project delivered strong alignment with its objectives by improving market understanding, analysing retail and wholesale formats, gathering in-market feedback, and establishing a foundation of relationships and knowledge to support future export development activities aligned with the Melon Strategic Investment Plan's demand creation outcome.

Keywords

melons; export markets; Gulf Cooperation Council; United Arab Emirates; market access; demand creation; trade engagement; supermarket tour; wholesale markets; Gulfood; buyer engagement; market intelligence

Introduction

The Australian melon industry is a significant contributor to the horticulture sector, with a well-established 12-month production base and a strong reputation for quality, traceability and food safety. Despite this, export volumes remain modest relative to total production, with approximately 6-8 per cent of Australian melons exported annually. While exports have grown over the past decade, they remain below pre-COVID peaks attributed to supply chain disruptions. This highlighted the need for renewed focus on market understanding, exporter readiness, and demand creation.

The Gulf Cooperation Council (GCC) markets, particularly the United Arab Emirates (UAE), represent an important opportunity for the Australian melon industry. The region is characterised by high consumption of imported fresh produce, limited domestic production, and sophisticated retail, wholesale, and foodservice supply chains. The UAE is Australia's highest-value melon export market and one of the top destinations by volume, supported by strong logistics infrastructure and the presence of major regional importers and retailers. However, competition from lower-cost origins such as Iran and Qatar, complex market structures, and varying buyer expectations and requirements can present barriers to entry for Australian exporters.

Project VM25003 (Enhancing Melon Export Opportunities to Gulf Countries) was initiated by Hort Innovation to address these challenges and support the Australian melon industry's demand creation objectives under the Melon Strategic Investment Plan (SIP) 2022–2026. The project was designed to improve industry understanding of GCC markets, facilitate direct engagement with in-market stakeholders, analyse retail and wholesale sales environments, and gather buyer feedback to inform future export development activities.

Delivered by Export Connect in partnership with Melons Australia, the project adopted a practical, market-led approach. This included targeted market research, development of export-oriented market intelligence and briefing presentations, and an in-market engagement program aligned with Gulfood, one of the world's largest food and beverage trade exhibitions. The project focused on the UAE as the primary market, with additional consideration given to Saudi Arabia and Qatar as secondary opportunities.

By combining on-the-ground market observation with direct engagement across retail, wholesale, and importing channels, the project aimed to strengthen exporter capability, increase awareness of Australian melons and their USPs among key buyers and importers/distributors, and provide a clear evidence base to guide future trade initiatives.

Methodology

The project was delivered using a phased methodology consistent with the agreed project scope. The approach combined stakeholder consultation, market research, exporter preparation, in-market engagement, and post-mission analysis to support demand creation objectives for Australian melons in Gulf Cooperation Council (GCC) markets.

A high-level overview of the methodology is provided in the table below. Detailed supporting materials and outputs produced under each phase are provided in the appendices.

Table 1: Phased Methodology and Key Activities

Phase	Key Activities
Phase 1. Planning and Stakeholder Management	<ul style="list-style-type: none"> • Consultation with Hort Innovation and Melons Australia, to confirm priorities and strategic objectives for the project. • Development of stakeholder engagement and communications plan. • Preparation of M&E plan, and project risk register in line with Hort Innovation requirements • Development of a draft itinerary aligned with project objectives • Initial engagement of key contacts, stakeholders and buyers in the GCC
Phase 2. Market Insights and Pre-Departure Preparation	<ul style="list-style-type: none"> • Development of market and competitor research to map competitors, buyers, and category dynamics across the UAE, Saudi Arabia and Qatar • Development of a comprehensive UAE market insights report and supporting market snapshots • Completion of an online and in-store competitor reviews to analyse pricing, formats, country-of-origin positioning, and retail presence • Development and distribution of a pre-departure briefing pack covering market context, consumption trends, pricing, cultural and business etiquette, and profiles of targeted stakeholders
Phase 3. In-Market Engagement (UAE and Gulfood)	<ul style="list-style-type: none"> • Delivery of a structured in-market program in the UAE, including supermarket and wholesale market tours, including meetings with key decision makers and managers. • Facilitated targeted meetings with importers, distributors, retailers, and vertically integrated suppliers servicing the GCC's retail, wholesale, and foodservice channels. • Supported buyer engagement and conversations at Gulfood, including coordinated introductions. • Pitching key USPs of Australian melons to shape perception, positioning and commercial potential within buyer meetings.
Phase 4. Post-Mission Analysis & Reporting	<ul style="list-style-type: none"> • Review of key feedback, insights and benchmarks collected during the mission. • Preparation of milestone reports, public summaries, and a final consolidated report documenting the outcome of the visit, feedback from participants, and potential future opportunities. • Development of practical recommendations to inform future melon export strategies and initiatives.

Photos/images/other audio-visual material

Photos taken from the market visit, including the supermarket and wholesale market tour can be found [in this Google Drive folder](#).

Results and discussion

This project generated a substantial body of qualitative insights through pre-market research, in-market observation, and direct engagement with retailers, wholesalers, importers, and distributors across the UAE and broader GCC. These findings provide a clearer understanding of how melons are positioned in GCC markets and what this means for Australian exporters.

Supermarket Visit Observations

Supermarket visits conducted on Sunday 25 January across a range of leading UAE retail chains provided valuable insights into the retail execution of the melon category. The stores visited were Choithrams, Union Co-op, Spinneys, Lulu, Carrefour, and Grandiose. Across these stores, melons were generally positioned as a high-volume, high-turnover category, with a strong emphasis on price competitiveness, followed by consistency and quality across Tier 1 stores in Dubai.

Across all stores, melons were positioned as a high-volume, high-turnover category. Pricing competitiveness remains a key driver of ranging decisions, particularly in value-led chains, with consistency of supply and visual quality becoming increasingly important in higher-tier retail environments.

In-store observations highlighted a diverse range of melon formats, including whole fruit, varying weights, and seedless options. Regionally imported product dominated shelf space, reflecting shorter supply chains and price competitiveness. Product origin, fruit size, and visual presentation varied notably between retailers, reinforcing the importance of understanding retail price architecture and margin expectations across different banners.

Watermelons were the most prevalent melon type across all stores visited. The majority of watermelons observed were sourced from Iran and Jordan, particularly in value-oriented and hypermarket formats such as Carrefour and Lulu. In contrast, Australian watermelons were present in a limited number of premium stores, most notably Spinneys, and to a lesser extent Choithrams. Where Australian product was available, there was a clear differentiation in presentation, with stronger emphasis on appearance, consistency, and perceived quality compared to Iranian product, which was more price-led.



Melons in Spinneys ([full supermarket visit folder can be found here](#))

Rock melons and other melon varieties were present in smaller volumes but followed similar patterns of differentiation by retailer tier. Premium retailers such as Spinneys and Grandiose displayed the most consistent fruit sizing, cleaner presentation, and clearer category segmentation, signaling a stronger alignment with quality-driven consumer expectations. Findings, pricing, and country-of-origin representation remained consistent with key insights generated from an online and in-store competitor review conducted by Export Connect in December 2025 ([found here](#)).

Overall, these retail observations reinforce that Australian melons are not able to compete effectively on price alone in GCC markets. Instead, the findings suggest that Australian exporters are best positioned to target premium and upper mid-tier retailers, where differentiation through quality, food safety credentials, and supply reliability can support a premium positioning. Clear alignment of supply windows, formats, and specifications with retailer/importer requirements will be critical to sustaining long-term market presence.

Wholesale Market Visit Observations

The visit to the Al Aweer wholesale market on Monday 26 January provided direct exposure to the trading environment that underpins a significant proportion of the UAE's fresh produce supply. Engagements at Al Aweer reinforced its role as both a highly transactional marketplace and a relationship-driven commercial hub, particularly evident during visits to Bloom Market and Fresh Fruits Company, where on-market trading activity and buyer interactions were observed.

Beyond these central market hubs, the majority of time was spent in meetings at buyer offices located within the Al Aweer precinct. The delegation met with a broad cross-section of leading importers and distributors servicing retail, wholesale, and foodservice channels, including Abuseedo Trading, Nasik Trade, Choithrams and Desert Harvest, Pure Harvest, Barakat, and Kibsons. These meetings provided detailed insight into buyer operating models, sourcing strategies, and the role of Al Aweer as a consolidation and distribution point for both locally grown and imported produce.

Discussions with wholesalers and importers consistently highlighted the importance of supply continuity, logistics reliability, and the ability to meet diverse customer specifications. Many operators service multiple channels simultaneously, supplying supermarkets, independent retailers, foodservice customers, and e-commerce platforms from the same facilities. This requires a high degree of flexibility in product formats, sizing, packaging, and delivery schedules.

Buyer feedback also emphasised the significance of seasonal alignment and freight flexibility when evaluating new supply origins. While quality and food safety credentials are important, buyers indicated that inconsistent supply or inflexible logistics can quickly limit the viability of new import programs. Several discussions highlighted the preference for suppliers who understand the operational realities of the wholesale market and can adapt to fluctuating demand across different channels. For more details on these discussions, refer to Appendix 1.

For Australian exporters, these insights reinforce the need to look beyond end retailers and develop a strong understanding of wholesale market dynamics in the UAE. Aligning export strategies with importer and distributor operating models, including packaging formats, supply windows, and logistics options, all of which remain critical to successfully establishing and sustaining a presence in GCC markets.

Buyer Engagement and Feedback

Across the supermarket tour, wholesale market visit, and Gulfood engagement, Export Connect facilitated conversations with a broad range of importers, distributors, and retailers operating across the UAE and wider GCC region. These discussions provided direct feedback on Australian melons' market perception, with buyers generally associating Australia with strong food safety standards, quality production systems, and reliability.

Buyers expressed interest in specific melon types and formats, particularly seedless watermelons and rockmelons, and highlighted the value of consistent sizing, eating quality, and presentation. While no commercial outcomes were expected or concluded during the program, multiple buyers indicated openness to further discussions and follow-up once more detailed supply, and pricing information could be reviewed.

For a more detailed list of key contacts met, and feedback received from engagements, refer to Appendix 2.

Outputs

A summary of project outputs is provided in Table 2. Supporting materials are included as appendices and uploaded to the Delivery Partner Portal, in line with the approved M&E Plan.

Table 2. Output summary

Output	Description	Detail
UAE Market Insights Report (incl. KSA snapshots)	A comprehensive report detailing UAE market structure, retail and wholesale channels, the fresh fruit category, competitor presence, pricing dynamics, and market access considerations. Supplemented by a market snapshot for Saudi Arabia. Intended for levy payers, exporters, and industry stakeholders to support decision-making.	Written report delivered electronically to participants and Hort Innovation. Included as Appendix 3 and uploaded to the Delivery Partner Portal. M&E – Outputs: Market intelligence produced and disseminated. Intermediate Outcome: Improved exporter knowledge and awareness. SIP: Outcome 1 – Demand Creation; VM-O1S1; KPI VM-O1S1
GCC Online Competitor Review – Melons	Online review of melons sold across retail and e-commerce platforms in the UAE, Saudi Arabia, and Qatar, examining product formats, country of origin, and pricing positioning. Intended to support exporters in understanding competitive benchmarks.	Spreadsheet and summary analysis provided to participants. Included as Appendix 4. M&E – Outputs: Competitive analysis completed. Intermediate Outcome: Improved understanding of market positioning. SIP: Outcome 1; VM-O1S1
UAE In-Store Competitor Review – Melons	In-store review of melon ranging, pricing, weights, merchandising, and positioning across multiple UAE retailers, supported by images and video footage. Intended to provide practical, real-world retail insights for exporters.	Image folder, videos, and summary analysis. Included as Appendix 5. M&E – Outputs: Retail observations documented. Intermediate Outcome: Increased exporter capability and market awareness. SIP: Outcome 1; VM-O1S1
Pre-Departure Briefing Pack / Market Visit Information Pack	Program participant preparation materials covering GCC market context, business etiquette, buyer engagement protocols, logistics considerations, and draft itineraries. Intended to support appropriate and effective engagement with in-market stakeholders.	Distributed via email prior to travel. Included as Appendix 6 and uploaded to the Delivery Partner Portal. M&E – Outputs: Exporter preparation resources delivered. Intermediate Outcome: Increased exporter confidence and engagement readiness. SIP: Outcome 1; VM-O1S3; KPI VM-O1S3K3
In-Market Engagement Program (Study Tour and Market Activation)	Structured UAE market visit program including supermarket tours, Al Aweer wholesale market visits, targeted buyer meetings, and engagement at Gulfood. Provided hands-on exposure to retail and wholesale environments and facilitated direct buyer interaction.	Delivered January 2026. Evidence includes itineraries, meeting notes, and engagement summaries. Included as Appendix 1, 2, and 7. M&E – Outputs: Engagement activities delivered as planned. End-of-Project Outcome: Strengthened exporter readiness and relationships. SIP: Outcome 1; VM-O1S1; KPI VM-O1S1K1
Buyer Engagement and Feedback	Consolidated qualitative feedback from importers, distributors, and retailers on Australian melons, including perceptions, sourcing requirements, and commercial	Incorporated into Results and Discussion; detailed notes provided in Appendix 1 and Appendix 2. M&E – Outputs: Buyer feedback captured.

Summary	considerations. Intended to inform future industry export and marketing strategies.	Intermediate Outcome: Improved market insight and relationship foundations. SIP: Outcome 1; VM-O1S1 & VM-O1S3
Final Consolidated Report and Public Summary	Final report documenting project delivery, outputs, outcomes, and recommendations, supported by a public summary suitable for industry dissemination. Intended for levy payers, industry stakeholders, and Hort Innovation.	Delivered in Hort Innovation format and uploaded to the Delivery Partner Portal. M&E – Outputs: Knowledge transfer completed. End-of-Project Outcome: Evidence-based contribution to demand creation. SIP: Outcome 1

Outcomes

The outcomes achieved through VM25003 reflect the project’s program logic and Monitoring and Evaluation (M&E) Plan and demonstrate progress toward the Melon Strategic Investment Plan (SIP) demand creation outcome. Outcomes are described in Table 3.

Table 3. Outcome summary

Outcome	Alignment to fund outcome, strategy and KPI	Description	Evidence
Increased exporter knowledge and market awareness	<p>Fund outcome: Melon SIP Outcome 1 – Demand creation supports the Australian melon industry to develop existing and future markets.</p> <p>Strategy: VM-O1S1 – Maintain and improve trade with existing premium export markets.</p> <p>KPI: VM-O1S1K1 – Growth in export market share into selected markets.</p>	<p>Participants demonstrated increased understanding of GCC market structures, retail and wholesale category dynamics, competitive positioning, and buyer expectations. This outcome was realised through the provision of targeted market intelligence, competitor analysis, pre-departure briefings, and direct observation of retail and wholesale environments during the market visit. Improved market awareness at this stage is critical to enabling informed export decision-making and future demand creation at the fund level.</p>	<ul style="list-style-type: none"> Market insights reports and competitor reviews delivered Supermarket and wholesale tour observations Participant feedback and post-program survey responses
Improved exporter confidence and export readiness	<p>Fund outcome: Melon SIP Outcome 1 – Demand creation.</p> <p>Strategy: VM-O1S3 – Facilitate exporters to build networks in market.</p> <p>KPI: VM-O1S3K3 – Facilitation for exporters to build networks in-market.</p>	<p>Participant confidence to engage with importers, distributors, and retailers in GCC markets increased as a result of structured preparation and facilitated in-market engagement. This outcome was realised through the delivery of a pre-departure briefing pack, guided buyer meetings, and exposure to buyer operating models across retail, wholesale, and foodservice channels. Improved readiness supports future engagement and relationship development required for demand creation.</p>	<ul style="list-style-type: none"> Pre-departure briefing materials Facilitated buyer meetings and engagement records Participant survey responses indicating increased confidence
Strengthened buyer awareness of Australian melons	<p>Fund outcome: Melon SIP Outcome 1 – Demand creation.</p> <p>Strategy: VM-O1S1 – Maintain and improve trade with existing premium export markets.</p> <p>KPI: VM-O1S1K1 – Growth in export market share into selected markets.</p>	<p>Buyer awareness of Australian melons and their potential fit was strengthened through direct engagement during supermarket tours, wholesale market meetings, and Gulfood. While no commercial outcomes were expected within the project timeframe, multiple buyers indicated openness to follow-up discussions, pricing requests, or further introductions. This outcome contributes to demand creation by increasing consideration of Australian melons.</p>	<ul style="list-style-type: none"> Buyer meeting notes and engagement summaries Al Aweer wholesale market meetings Gulfood engagements

<p>Availability of new market intelligence to inform future industry action</p>	<p>Fund outcome: Melon SIP Outcome 1 – Demand creation.</p> <p>Strategy: VM-O1S1 – Export markets; VM-O1S3 – Build networks.</p> <p>KPIs: VM-O1S1K1; VM-O1S3K3.</p>	<p>The project generated new, industry-relevant market intelligence including retail and wholesale dynamics, competitor benchmarking, and buyer requirements.</p> <p>This knowledge can be made available to levy payers and industry stakeholders to inform future export planning, marketing initiatives, and potential follow-on projects. At the fund level, this outcome supports continuous improvement and evidence-based decision-making.</p>	<ul style="list-style-type: none"> • UAE Market Insights Report • GCC online and in-store competitor reviews • Final consolidated report and public summary
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Monitoring and evaluation

Monitoring and evaluation activities for VM25003 were undertaken in accordance with the approved project Monitoring and Evaluation (M&E) Plan. Evidence was collected through key deliverables, market observations, buyer engagement notes, and participant feedback, and was used to inform both project reporting and lessons for future export development initiatives.

Table 4. Key Evaluation Questions

Key Evaluation Question	Project performance	Continuous improvement opportunities
1. To what extent has the project achieved its expected outcomes?	<p>The project achieved its expected outcomes by improving exporter knowledge, confidence, and export readiness for GCC markets, and by strengthening foundations for engagement with importers, distributors, and retailers.</p> <p>Market intelligence outputs, pre-departure preparation, and direct in-market engagement supported increased understanding of buyer requirements and category dynamics.</p> <p>While no commercial outcomes were expected at this stage, buyer interest and follow-up intent indicate progress toward demand creation objectives.</p>	<p>Future projects could incorporate structured follow-up support post-mission (e.g. facilitated buyer follow-up sessions) to help participants translate readiness into longer-term commercial outcomes.</p>
How relevant was the project to the needs of intended beneficiaries?	<p>The project was highly relevant to industry and participating exporters, aligning with industry priorities to diversify and strengthen export markets.</p> <p>Activities directly addressed barriers to export engagement by providing market intelligence, real-world exposure, and buyer access in a priority region. The project aligned strongly with Melon SIP Outcome 1 – Demand Creation.</p>	<p>Having a longer build-up period allowing for earlier engagement with a broader group of levy payers could further refine focus areas and increase awareness among non-participating exporters. This would also encourage greater participation within industry.</p>
How well have intended beneficiaries been engaged in the project?	<p>Intended beneficiaries were engaged through a structured process that included pre-departure briefings, facilitated in-market meetings, and guided retail and wholesale tours. Engagement levels were appropriate for the small delegation size and ensured meaningful interaction with relevant buyers and stakeholders.</p>	<p>Future programs could consider hybrid engagement models (e.g. virtual briefings or recorded market insights) to extend benefits to a wider group of levy payers beyond those travelling.</p>
To what extent were engagement processes appropriate to the target audience/s?	<p>Engagement processes were appropriate to both exporters and in-market stakeholders.</p> <p>Activities matched preferred learning styles, combining written intelligence with direct dialogue.</p> <p>Buyers engaged represented relevant decision-makers across retail, wholesale, and distribution channels.</p>	<p>Additional tailoring of engagement by participant experience level (e.g. new exporters vs experienced exporters) could further enhance relevance and learning outcomes.</p>
What efforts did the project make to improve efficiency?	<p>The project leveraged existing Export Connect networks, market insights, and collaboration with Melons Australia to deliver outputs efficiently within limited time and budget. Group-based engagement maximised exposure to multiple buyers and channels within a limited timeframe.</p>	<p>Efficiency could be further improved by coordinating cross-commodity engagement where appropriate to maximise shared learnings.</p>

Recommendations

Based on the outcomes and insights generated through VM25003, the following recommendations are made to support practical application of findings and maximise value for the Australian melon industry.

Recommendations for Growers and Exporters

Leverage importer-led pathways and target premium retailers in GCC markets

Growers and exporters should prioritise engagement with premium and quality-focused retailers and importers in the UAE and wider GCC, where Australian melons are best positioned to compete on quality, consistency, and food safety credentials rather than price alone.

Given the central role of importers and wholesale markets in the UAE fresh produce supply chain, exporters should prioritise building relationships with importers and distributors that service multiple channels, including retail, wholesale, foodservice, and e-commerce. Engagement with established importers such as Kibsons, BerryMount, Barakat, Al Bakrawe, NRTC, or Fresh Fruits Company during the project can provide a more efficient and scalable pathway to market entry than pursuing individual operators in isolation.

Align supply windows, formats, and specifications to buyer requirements

Exporters should use the market intelligence generated through this project to refine product messaging to better match retail and wholesale buyer expectations, particularly across areas such as logistics, supply capability, capacity, and promotional support. The insights can also be used more broadly by industry to refine the regional pitch to prospective leads and buyers.

Recommendations for Hort Innovation and Industry Bodies

Maintain momentum through a follow-up market visit and longer-term engagement program

To capitalise on the relationships and market awareness established through VM25003, Hort Innovation and industry bodies should consider supporting a follow-up market visit by the end of 2026 or in conjunction with Gulfood 2027. Rather than a one-off activity, this could be structured as a three-year engagement program that combines repeat in-market presence, ongoing buyer engagement, and targeted exporter support. A longer-term approach would allow relationships to mature, support continuity with key importers and retailers, and improve the likelihood that initial interest translates into sustained commercial outcomes for the Australian melon industry.

Support follow-on exporter capability and market-entry activities

Future programs should build on the foundations established through VM25003 by providing structured post-mission support to participating exporters. This could include facilitated buyer follow-up, exporter coaching, and practical guidance on progressing market interest into commercial trials or pilot shipments. Providing support beyond the initial market visit would help exporters navigate the complexities of pricing, logistics, and contractual discussions, increasing the likelihood that early engagement translates into sustainable trade outcomes and providing visibility on the progress of conversations between exporters and prospective buyers.

Use market intelligence outputs to inform broader industry extension

The market intelligence, competitor analysis, and buyer insights generated through this project represent a valuable resource for the wider melon industry. Hort Innovation and industry bodies should leverage these outputs through targeted extension activities, such as webinars, industry briefings, or summary publications, to ensure non-participating levy payers also benefit. Broader dissemination would support improved industry-wide understanding of GCC markets and reduce duplication of effort in future export initiatives.

Undertake follow-on projects focused on commercial pathway development

Future programs could focus on addressing practical barriers identified through buyer engagement seasonal supply mapping, or logistics optimisation. These activities would help bridge the gap between market awareness and sustained trade by testing assumptions in real-world conditions and providing evidence to support longer-term commercial decisions.

Explore cross-commodity or multi-industry market engagement models

Buyer discussions highlighted interest in consolidated sourcing and relationships with suppliers that can offer multiple complementary products. Future projects could explore coordinated market engagement across compatible horticultural commodities (such as melons and stone fruits) to improve efficiency, reduce costs, and strengthen Australia's overall

market presence in GCC markets. Such models may also increase buyer engagement by aligning more closely with importer operating structures.

Embed findings into future demand creation and trade strategies

Insights from this project should inform future demand creation initiatives, trade missions, and promotional activity under the Melon Strategic Investment Plan, ensuring continuity and long-term value from the investment.

Intellectual property

No project IP or commercialisation to report

Appendices

Appendix 1: Al Aweer Tour Meeting Notes

This appendix contains detailed meeting notes taken from discussions held during the Al Aweer wholesale market tour on Monday 26 January. The notes document qualitative insights from meetings with importers, wholesalers, retailers, and vertically integrated fresh produce businesses, capturing buyer perspectives on sourcing requirements, logistics, product specifications, and perceptions of Australian melons.

Abuseedo Trading

Abuseedo Trading is a family-owned fresh produce business established in 1972, with a long history in the UAE wholesale market. The company has grown into a well-established regional operator, using the UAE as a central hub for sourcing, distribution and re-export across the GCC.

The business is primarily focused on wholesale distribution across the Middle East and wider GCC. The core focus for Abuseedo Trading is fresh fruits, although they have a sister company that imports vegetables. With over 95% of imports coming by sea, focusing on higher volumes while applying lower margins than other distributors in the market. In the meeting Abuseedo's Director mentioned that the most dynamic channels driving growth for premium produce have been the HORCA channel, alongside leading retailers such as Carrefour, Spinneys, and Lulu, while wholesale offers selective opportunities.

Abuseedo historically has imported a broad range of Australian fresh produce, primarily being seedless watermelons, carrots and grapes. Australian product is regarded as a trusted source of high-quality product with consistent delivery patterns and minimal waste.

Supply challenges can occur, particularly when sourcing from less developed or informal markets, where price volatility, quality inconsistency and product losses can be higher. In some cases, product availability does not translate into commercial viability due to these risks.

The discussion also touched on interest in organic produce, including Australian organic offerings. Abuseedo noted that organic products could be sourced either directly or through agents, with demand currently driven by specific customers and niche channels rather than the broader market. From their perspective, the organic segment remains less developed than in other regions, with purchasing decisions still largely influenced by price and visual appearance rather than certification alone.

Abuseedo's regional reach and long-standing experience in the UAE wholesale market position the business as a key conduit for Australian fresh produce into GCC markets. The strongest opportunities for Australian exporters lie in supplying consistent and competitively priced volumes.

Nasik Trade

Nasik Trade operates as a high-volume fresh produce importer supplying the UAE market, with product moving from packhouse to market in a relatively short window. Volumes were described as significant, reflecting a business geared toward scale and speed.

The company is focused solely on the UAE market, servicing a mix of hotels, restaurants, retail customers and wet shops. Retail is an important channel, with supply into established chains alongside independent outlets. Imports are primarily sourced from Mexico and other origins, depending on availability and pricing.

Nasik Trade does import Australian fresh produce, including watermelons, citrus and avocados. Australian watermelons were discussed in the context of pricing, with indicative levels referenced at approximately AUD \$35-40 per carton, equating to around AUD \$2.20 per kilogram, positioning the product within a competitive but premium segment.

Demand growth was noted for seedless watermelon, supported by strong consumer acceptance and consistent retail pull-through. This growth has been reinforced by improving quality and eating experience, with seedless formats increasingly preferred by buyers and end consumers.

The business indicated that they do not typically face shortages, noting that alternative sourcing origins are generally available when supply gaps arise. This flexibility allows continuity of supply but also reinforces the importance of price competitiveness in supplier selection.

Chaithra's

Choithrams is a long-established supermarket and food distribution business in the UAE, with a strong presence across neighbourhood retail locations and a well-developed fresh produce offering. The business services a broad customer base and has a long history of importing fresh produce to meet the needs of both retail and foodservice customers.

Discussions focused on Choithrams' fresh produce sourcing and handling requirements. A strong emphasis was placed on maintaining product freshness through effective cold chain management, handling practices and logistics, particularly for imported fruit. Transit time and freight method were highlighted as key considerations, with sea freight transit of around 14 days noted as challenging for some categories where quality can be impacted if handling is not optimal. The airfreighted product was described as arriving in very good condition, supported by controlled handling processes and modified atmosphere logistics.

Historically, opportunities have been identified within the hotel and hospitality sector, where demand for high-quality and consistent produce continues to grow. This channel was seen as increasingly important, particularly for premium fruit categories that require strong presentation and eating quality.

Choithrams has historically sourced Australian watermelons and rockmelons, alongside imports from other origins including the United States and Mexico. Australian melons were discussed positively, while domestic UAE production was noted as supplying acceptable-quality melons during the June-July period, particularly through the warmer months. Seasonal sourcing decisions were influenced by a combination of origin performance, pricing and consistency.

Product demand was discussed in relation to climate, with hotter conditions driving stronger watermelon consumption, while cooler periods tend to favour other categories. Maintaining sourcing flexibility was considered important in order to manage seasonal shifts and market dynamics.

Interest was expressed in securing dependable melon suppliers who can consistently deliver high-quality watermelons and rockmelons. Given Australia's ability to supply melons year-round, opportunities for deeper collaboration with Australian suppliers were identified. Potential initiatives include exploring alignment across other categories, such as avocados, and establishing longer-term engagement programs focused on category development. A suggestion for a potential "Australian Fresh Produce Festival" was also raised as a promotional opportunity, involving the consolidation and collaboration of various fresh produce suppliers to collectively showcase Australian offerings.

Pure Harvest

Pure Harvest is a UAE-based agribusiness established in 2017/18, operating a controlled-environment agriculture model focused on premium fresh produce. The business runs high-tech glasshouse farms in the UAE, with additional operations across the region, including 32 hectares in Saudi Arabia and three farms in Al Ain. Production focuses on crops such as tomatoes, strawberries and blueberries, supplying the domestic market with locally grown produce year-round.

The company is strongly focused on the UAE market, with retail representing approximately 65% of sales, followed by HORECA and foodservice, while wholesale accounts for a smaller share. E-commerce was noted as a growing channel, now representing around 25% of sales, supported by increasing consumer demand for fresh, locally grown produce. Key retail customers include major supermarket chains such as Spinneys and Carrefour, alongside other premium outlets.

Pure Harvest emphasised that its model is designed around freshness, food security and consistency, with produce harvested and delivered locally rather than imported. As a result, the business does not currently view the UAE market as well suited to premium imported melons, noting that local production is able to meet much of the demand for core categories. Melons are not a current focus within their production portfolio.

Seasonality and climate were discussed as important factors influencing production planning, with controlled environments allowing year-round supply while managing heat and water constraints. The business highlighted ongoing investment in technology and infrastructure to improve yield, quality and resource efficiency.

Organic produce was discussed in the context of broader market demand. While there is consumer interest in organic products, Pure Harvest noted that organic remains a relatively small segment in the UAE, with uptake still driven by price sensitivity and practicality. Interest was noted to be primarily in lines such as potatoes, sweetcorn and tomatoes, though overall penetration remains limited.

Pure Harvest's approach reflects a longer-term focus on local production, food resilience and controlled growing systems, positioning the business as a key domestic supplier rather than an importer-led operation. For Australian exporters, this reinforces the importance of understanding where imported product complements local production, particularly in categories or seasonal windows not currently addressed by UAE-based growers.

Barakat

Barakat operates as one of the UAE's largest fresh produce processors and juice manufacturers, with a strong focus on value-added and ready-to-consume formats. The business sources significant volumes of fresh fruit to support its processing operations, alongside supplying select fresh produce lines into the market.

Australian avocados were discussed, with Barakat noting exclusive arrangements with Tanzanian supply. Australian fruit was viewed favourably from a quality perspective, particularly during periods when alternative origins are less reliable.

Melons form an important input category, with Barakat sourcing rockmelons from Western Australia. Specifications and pricing were discussed in detail, with indicative pricing referenced at approximately CFI Dubai, USD 4.20 per carton for medium (4-6 count) and USD 4.50 per carton for larger (6-9 count) sizes.

Sea freight options were discussed, with South Africa referenced as offering more viable pricing, although transit time and consistency remain key considerations. Rockmelons were referenced at 5-6 count in 14 kg net cartons, with ongoing attention to container availability and loading plans.

Seedless watermelon was highlighted as a key growth category, with Barakat currently handling Class 1 seedless watermelons on a weekly basis, moving approximately 4-5 pallets per shipment. Strong consumer acceptance was noted for seedless formats, with striping patterns influencing purchase behaviour.

Transit time challenges were discussed, particularly for Brazilian supply with voyages exceeding 45 days, reinforcing interest in alternative origins where transit times can better support quality outcomes. Australian melons were noted as having growing potential, particularly where consistency and transit reliability can be maintained.

Watermelon preferences were discussed in terms of size and presentation, with demand centred around 5–7 kg fruit, seedless varieties and natural striping. Consumer perception was noted as an important factor, with striping patterns not always immediately associated with Australian origin, reinforcing the importance of education and presentation at point of sale.

Barakat also sources Australian carrots, working with suppliers in Queensland, and continues to assess opportunities to optimise sourcing across key fresh produce categories, with interest in re-evaluating opportunities for Australian Avocados.

Kibsons

Kibsons is a long-established, family-owned fresh produce importer and distributor with over 40 years' operating in the UAE market. The business has evolved into a highly integrated model combining wholesale distribution with a strong direct-to-consumer e-commerce platform, supported by a robust cold chain and same-day delivery capability.

Seedless watermelon was discussed as a key category, with pricing identified as the primary driver of demand. Kibsons operates in an open and highly competitive market, with retail pricing closely monitored and margins tightly managed. Australian watermelons are typically considered when Spanish supply is out of season, as Spanish products are significantly more cost competitive. Indicative pricing for Australian watermelon was referenced at approximately AUD \$3.00/kg CIF, which was described as expensive for the category under current market conditions.

The business indicated openness to consolidating shipments of Australian produce, noting that volume and consistency of supply is critical, though full pallet movements can be challenging depending on origin and timing. Product specifications were discussed, including interest in seedless rockmelons (6-7 count) and orange-fleshed varieties, with quality and eating experience remaining central considerations.

Kibsons services a broad customer base, with approximately 60-70% of volume moving through foodservice, including hotels and restaurants, and the balance through retail and e-commerce. Their online platform is a key differentiator, enabling customers to place orders up to late afternoon with same-day delivery, supported by strong cold chain performance across the supply network. The company highlighted its focus on promotional activity through e-commerce, often centred around imported lines such as potatoes from the USA, seasonal vegetables and branded produce programs. Sourcing decisions are strongly influenced by freight cost, transit time and consistency, with European origins often preferred due to proximity and lower freight exposure.

Organic produce was discussed as an emerging area of interest. Kibsons identified themselves as a top 3 supplier of organic produce to the UAE market, primarily sourced from Spain and Europe, where freight costs are lower and supply is more established. Domestic sourcing was noted as strengthening, though imported organic lines continue to play a role. Organic melons were not currently a mainstream item, however, Kibsons indicated openness to exploring organic melon opportunities should pricing, quality and supply continuity align with market expectations.

Appendix 2: Key Contacts Met During Market Visit

Company	Market / Channel	Engagement Summary / Notes
Berry Mount Vegetables and Fruit Trading	UAE – Importer / Distributor	Currently importing avocados from Australia. Potential opportunity to collaborate on melon imports following initial discussion. Shared details for Melons Australia to contact.
Fresh Fruits Company	UAE – Importer / Distributor	Brief conversation at Gulfood. One of the leading importers in the region, already importing significant volumes from Australia. Open to further discussion and shared details for Melons Australia to contact.
Kibsons	UAE – Importer / E-commerce / Retail Supply	Major importer supplying premium retailers and operating a leading e-commerce platform. Interested in importing more melons, avocados, onions, and stone fruit, with interest in promotional collaboration for Australian melons. Conversations remain ongoing with Melons Australia.
Barakat	UAE – Importer / Processor / Distributor	Leading importer and processor. Keen interest in seedless watermelons (no stripes), rockmelons, and avocados. Focus is on volume over price. Emphasis on Melons Australia to follow up conversations.
Nasik Fruits and Vegetables Trading	UAE – Importer / Wholesale / HORECA	High-volume importer supplying retail, wholesale, and HORECA. Requested quotes for seedless watermelons and honeydew melons, with interest in other fruit categories. Met up again at Gulfood following the Al Aweer Tour and reinforced that he would get in contact with the group.
Al Bakrawe Holding	UAE / GCC – Importer / Distributor	Introductory discussion held at Gulfood. Interested in importing additional Australian fresh produce, including melons and avocados, with capability to service retail, wholesale, and HORECA across the GCC. Interested by proposition of 12-month supply of melons, as their current partners are only able to supply for 8 months of the year.
Abuseedo Trading	UAE – Importer / Distributor	Prominent trading company supplying wholesale, retail, and HORECA. Previously imported Australian produce and expressed interest in introductory discussions and quotes for melons and avocados. Emphasis on Melons Australia to follow up – key discussion point remains air vs sea freight given the short life of Melons.
Choithrams / Desert Harvest	UAE – Retail / Import	Leading retailer with experience importing Australian melons. Interested in increasing watermelon and rockmelon imports and exploring potential Australian fresh produce promotions. Emphasis on Melons Australia to follow up.
GMG Group (Geant Premium)	UAE – Retail	Strong interest in understanding Australian melon sourcing opportunities for Geant Premium Supermarkets (50+ stores). Introductory meeting was held following initial Gulfood conversation with Melons Australia. Further product specifications are being requested, with potential for a partnership opportunity.
Pure Harvest	UAE – Producer / Importer	UAE-based producer with prior melon import experience. Current focus on other crops.
Carrefour	UAE – Retail	Brief discussion at Gulfood. Interested in further sourcing discussions, particularly attracted to potential 12-month melon supply, likely via an importer.
Grandiose	UAE – Premium Retail	Premium retailer visited during supermarket tour. No explicit interest expressed; recommended for introductory follow-up to build awareness.
Union Co-op	UAE – Retail	Contact established via supermarket tour. Recommended for introductory outreach to establish awareness of Australian melons.
Tamimi Markets	Saudi Arabia – Retail	Leading Saudi retailer (110+ stores). Expressed interest in Australian melons and requested pricing discussions; follow-up introductions facilitated with SMA Marketing post-event.

Appendix 3: UAE Market Insights Report and Saudi Arabia Market Snapshot

This appendix contains the UAE Market Insights Report and the Saudi Arabia Market Snapshot developed as part of the project. These documents provide detailed analysis of market structure, retail and wholesale channels, competitor dynamics, and market access considerations to support informed export decision-making.

- [UAE Market Insights Report \(link\)](#)
- [Saudi Arabia Market Snapshot \(link\)](#)

Appendix 4: GCC Online Competitor Reviews

This appendix includes the GCC online competitor reviews examining melon products across retail and e-commerce platforms in the UAE, Saudi Arabia, and Qatar. The analysis highlights product formats, country of origin, pricing positioning, and competitive dynamics relevant to Australian exporters.

- [GCC Online Competitor Review Snapshot \(link\)](#)

Appendix 5: UAE In-Store Competitor Review

This appendix includes the in-store competitor review conducted across multiple UAE retail locations. It documents melon ranging, pricing, weights, merchandising, and in-store positioning, supported by images and video footage captured during store visits.

- [UAE In-Store Competitor Review – Melons \(including spreadsheet + images and videos by store\) \(link\)](#)

Appendix 6: Pre-Departure Briefing Pack/Market Visit Information Pack

This appendix contains the pre-departure briefing and market visit information pack provided to participants ahead of travel. The materials outline market context, business and cultural considerations, buyer engagement guidance, and practical information to support effective in-market participation.

- [Market Visit Information Pack \(link\)](#)

Appendix 7: In-Market Program Overview

This appendix outlines the structure, itinerary, and key activities delivered during the UAE market visit and Gulfood engagement. The document provides context on the supermarket tour, Al Aweer wholesale market visits, and Gulfood-related activities that formed the core of the in-market engagement program and supports evidence of delivery against project objectives.

- [Program Overview \(link\)](#)