NEW ZEALAND
TRADE & ENTERPRISE
Te Taurapa Tūhono

SELLING NEW ZEALAND FRUIT IN MIDDLE EAST

Consumer research in the United Arab Emirates and Saudi Arabia

NZTE EMEA MARKET RESEARCH | SEPTEMBER 2025

BACKGROUND AND STUDY DESIGN

BACKGROUND

The purpose of this research is to provide actionable insights that will inform New Zealand exporters and stakeholders on how to effectively position and grow the presence of New Zealand fruit in the UAE and KSA markets.

SPECIFICATIONS

Markets: UAE & KSA.

Target group: consumers aged 21 to 70 years old; all to regularly purchase fresh fruit; all to be open to or already buying ‘premium fruit’; mix of online and in-store shoppers.

Target sample size: n300 per market.

Fieldwork timing: July 2025

STUDY DESIGN

Data collection method: online quantitative survey. LOI = 15 to 20 minutes.

Survey flow:
- Section A: Eligibility & profiling info
- Section B: Fruit purchasing
- Section C: Buyer priorities
- Section D: Country awareness & associations
- Section E: Packaging, sustainability, retail channels & gift packs

EXECUTIVE SUMMARY

KEY FINDINGS, CONCLUSIONS & RECOMMENDATIONS: (1 of 3)

Firstly. it should be flagged that there is a **high degree of consistency across the U&A and KSA markets.** However, **NZ Fruit is in a stronger existing position in UAE:** with NZ fruit rated #1 on the vast majority of characteristics. **In KSA NZ fruit is still well appreciated – but typically is rated a bit lower at #4 or #5.**

Fresh fruit is a frequent purchase

- Most fruit buying households buy it at least several times a week, with most buying around 1–4 kg of fruit per week. This buying frequency reflects the importance of 'freshness', which we see elsewhere in this report

Apples and bananas are core staples, while other fruits meet broader needs

- Apples and bananas dominate weekly purchases, followed by oranges, mangoes, and grapes. Mangoes and dates are the most mentioned fruit in UAE for special occasions (also appearing in top-5 for special occasions in KSA)

Freshness, quality, taste, nutrition, and ripeness are the top decision drivers

- Country of origin, sustainability, and brand are stated by consumers to be more secondary / lower importance drivers of choice

KEY FINDINGS & CONCLUSIONS & RECOMMENDATIONS : (2 of 3)

New Zealand is viewed as a **trusted and high-quality** source for specific fruit

- In **UAE** New Zealand is either #1 or #2 preferred market of origin for **kiwis**, **apples**, **blueberries**, **strawberries**, **avocados**, **pomegranates**, **grapes** and **cherries**
- In **KSA** New Zealand is either #1 or #2 preferred market of origin for **blueberries**, **strawberries**, **pomegranates** or **apples**

New Zealand fruit is most recognized in both markets for being having **good appearance**, being **high quality**, and **tasting good.**

New Zealand's key strengths align with what consumers value most

- Attributes like good taste, product quality, appearance, nutritional value, and ripeness are all critical in the purchase decision – and are all areas where **New Zealand** fruit performs strongly. These are key advantages to preserve and reinforce in future positioning efforts

Opportunities remain to strengthen **perceptions of value, good texture and shelf-life**

- Although **New Zealand** fruit is well regarded, it is less associated – relatively - with affordability, good shelf-life, and having the good/right texture
- Building stronger recognition in these areas may help further enhance competitive differentiation

KEY FINDINGS & CONCLUSIONS & RECOMMENDATIONS : (3 of 3)

Fruit gifting is a **meaningful and widespread tradition**

- Gifting fruit is a culturally rooted gesture of hospitality and health, especially during visits or as a wholesome alternative to sweets. This opens space for premium positioning and special packaging formats

Online platforms are growing, but **physical stores still dominate**

- Supermarkets are the primary purchase channel, though online platforms like **Amazon Fresh**, **Talabat Mart**, and **Hungerstation** are gaining ground. However, concerns around freshness, selection, and shelf life continue to limit wider online adoption

Sustainability awareness is growing but still **secondary to freshness and taste**

- While interest in eco-friendly and ethical aspects of packaging and sourcing is rising, these factors remain secondary to core drivers like freshness and taste

Packaging preferences focus on **practicality and ethics**

- Consumers prefer resealable and easy-to-open formats, with bulk and single-serve options also appealing
- Packaging that is organic, eco-friendly, or ethically positioned is positively received

ADDITONAL KEY FINDINGS: NOTABLE SUBGROUP DIFFERENCES (1 of 2)

AGE DIFFERENCES:
- In both markets **younger consumers (i.e. aged 21-30) buy fruit more often**
- In UAE those **aged 31-44** are more likely (vs those aged 45+) to buy **kiwis for special occasions**
- In UAE the younger **21-30 year olds** are **LESS LIKELY to buy kiwis as everyday fruit**
- In KSA the older consumers aged 45+ are much more likely (vs younger) to buy oranges and grapes as everyday fruit
- In UAE '**certifications' are more important for younger consumers** (i.e. 21-30 year olds) (packaging that highlights Organic certifications is significantly LESS IMPORTANT for the older consumers aged 45+).
- In UAE **younger consumers** are significantly **less likely to spontaneously recall NZ as a source of 'high quality fruit**'. These 21-30 year old are significantly less likely to buy NZ apples – BUT more likely than average to buy **NZ papayas and/or pomegranates** and to associate them with being 'high quality'.
- In KSA **older consumers** are notably **LESS willing to pay a premium for NZ fruit** and/or for sustainably produced fruit

GENDER DIFFERENCES:
- In both markets **women** are more likely than men to have **lemons/limes** as the fruit they buy most often
- In KSA **women** are significantly more likely than men to prefer **resealable packs**
- In KSA when thinking about barriers to buying fruit online, **men** are more concerned than women re '**delivery delays'**, while **women** are more concerned than men re '**inability to choose quality**' (63% vs 47%).

ADDITONAL KEY FINDINGS: NOTABLE SUBGROUP DIFFERENCES (2 of 2)

INCOME DIFFERENCES:

- In KSA **'brand' and 'ease of eating'** are relatively more important for **high income consumers**
- In KSA those with **high income** are significantly more likely to **associate NZ with high quality fruit** compared to those with low income
- In KSA those with **high income** are relatively **more likely to buy NZ apples, NZ blueberries and/or NZ bananas**

PRESENCE OF CHILDREN:

- In UAE **those with children are significantly more likely to buy NZ apples** compared to those without children

HOUSEHOLD SIZE DIFFERENCES:

- In UAE **larger h/holds of 5+ people** are relatively more likely (vs smaller h/holds) to buy **oranges and/or melons**
- In UAE those buying fruit for **larger households have a better opinion of NZ fruit** in terms of it being seen as '**good value for money**', '**good nutritional value**', and '**worth paying more for**'. They have a higher preference (vs those in smaller households) for **resealable fruit packaging** – and they also claim to be **more willing to pay a premium for sustainably produced** fruit.
- In KSA **larger h/holds** of 5+ people are relatively more likely (vs smaller h/holds) to buy **dates** most often

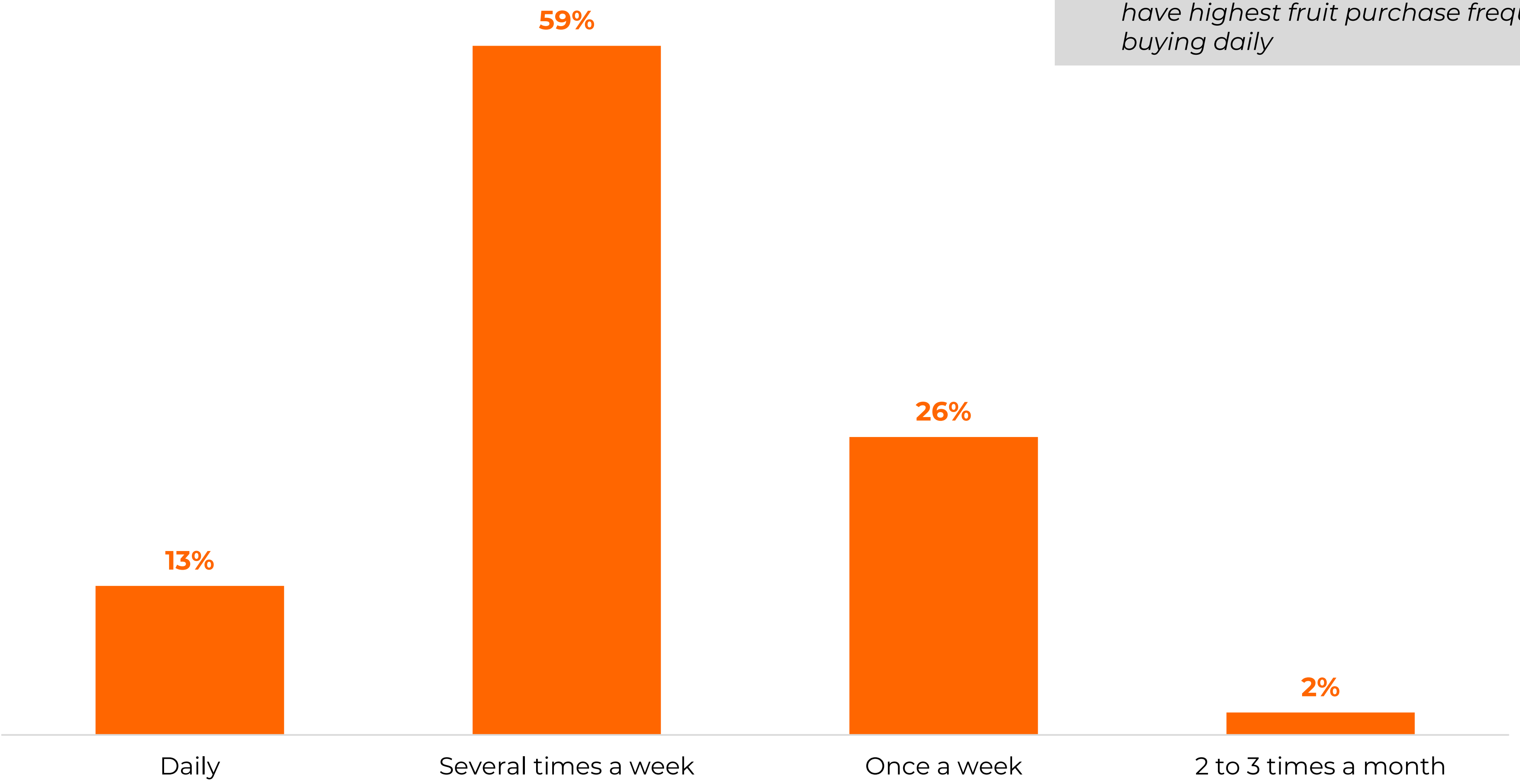
CULTURAL BACKGROUND DIFFERENCES:

- In KSA '**other Arabs' (i.e. Egyptians, Lebanese, Jordanians)** are significantly **LESS LIKELY to associate NZ with producing high-quality fruit.**
- By contrast **South Asians** in KSA are significantly **MORE LIKELY to associate NZ with high-quality fruit**

DETAILED FINDINGS

FRUIT PURCHASE FREQUENCY (B1): Most households maintain a steady supply of fresh fruit, buying it frequently throughout the week

PURCHASE FREQUENCY (B1)



Notable subgroup differences:

- *AGE: the younger UAE consumers (21-30 year olds) have highest fruit purchase frequency, with 23% buying daily*

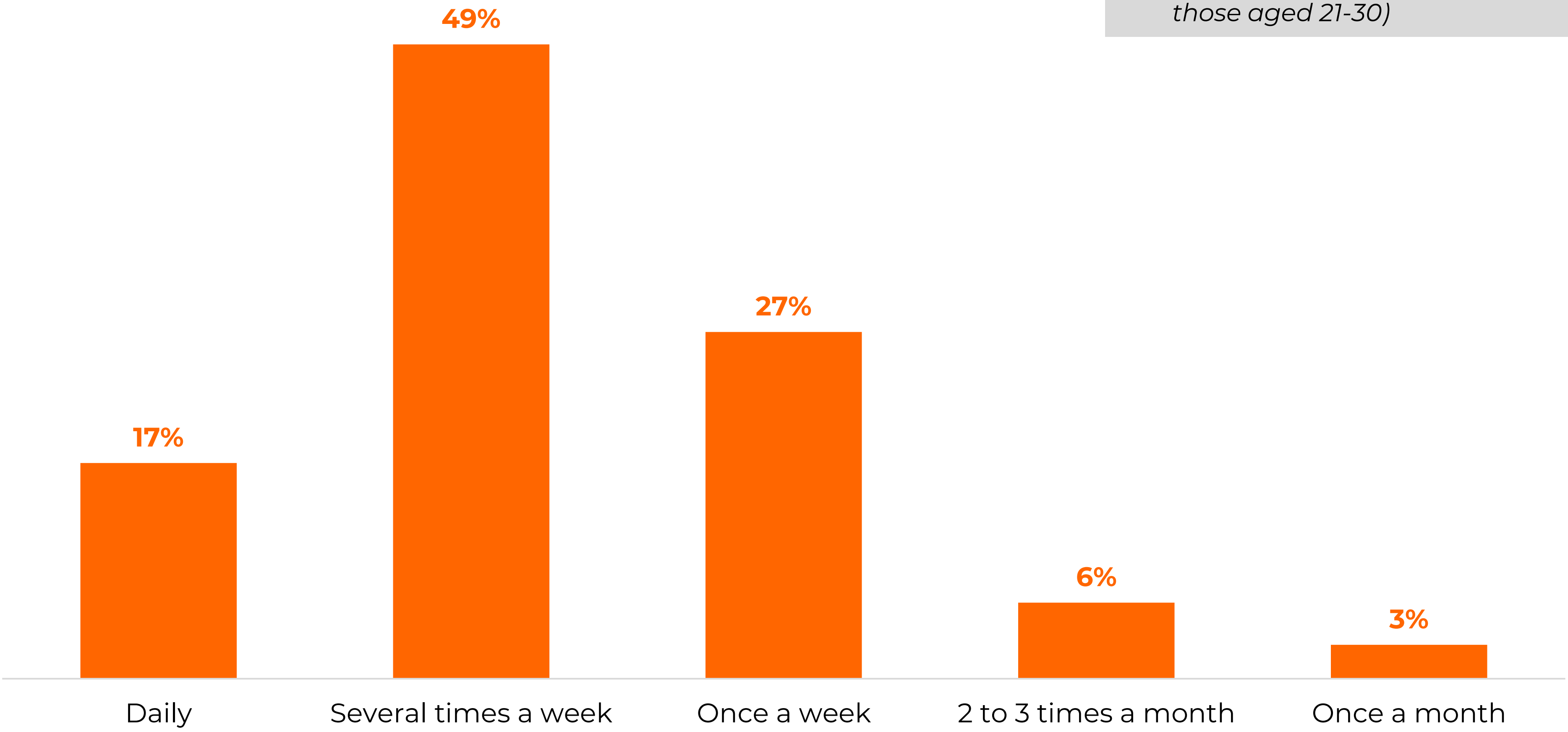
QB1: How often do you usually buy fresh fruit for your household?
Total N: 311

FRUIT PURCHASE FREQUENCY (B1): 66% of households purchase fresh fruit at least several times a week, showing strong demand for freshness and replenishment.

PURCHASE FREQUENCY (B1)

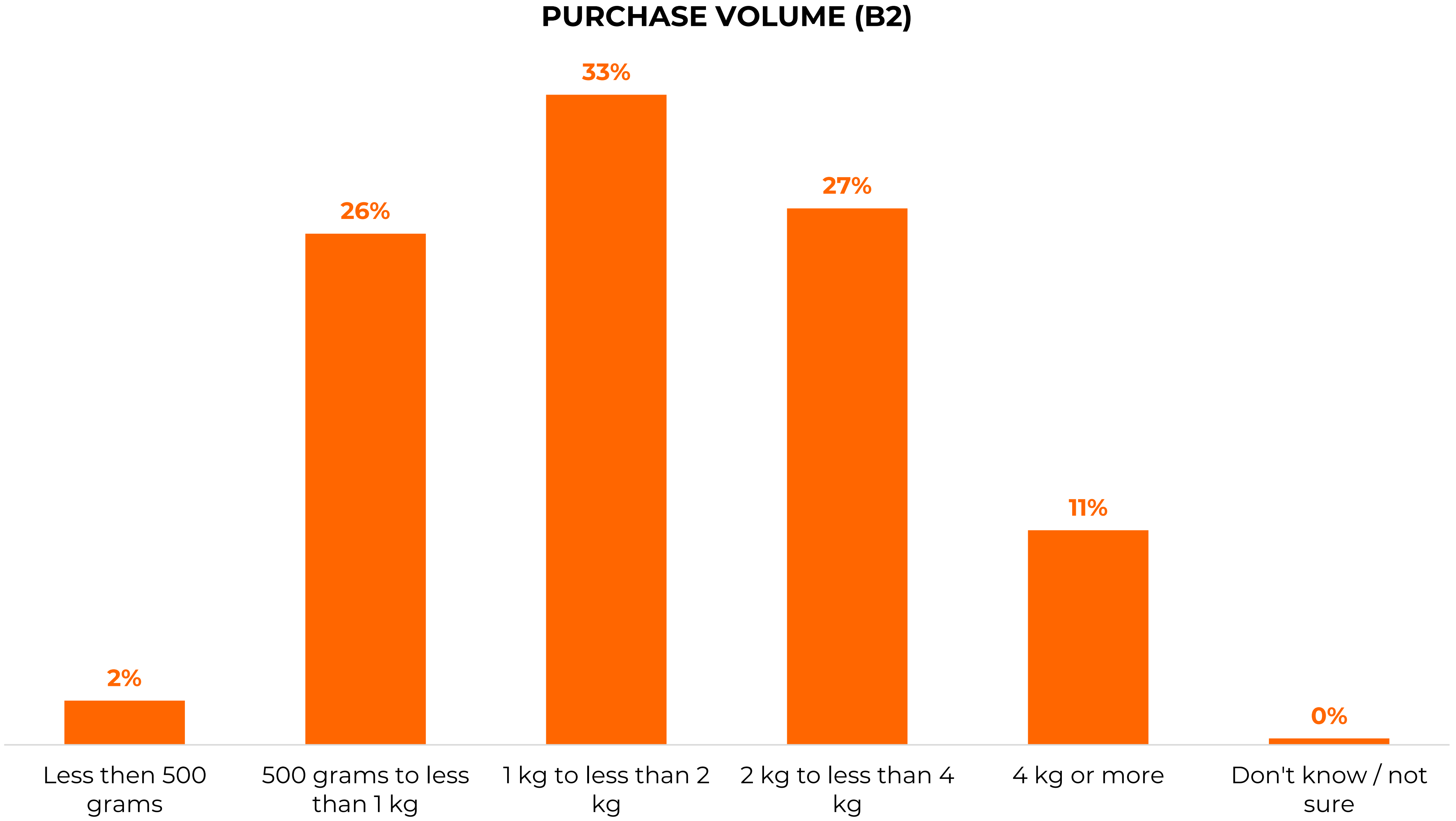
<u>*Notable subgroup differences*</u>*:*

- *AGE: older 45+ aged consumers are LESS LIKELY to buy fruit 'daily' (4% amongst those aged 45+ vs 23% amongst those aged 21-30)*



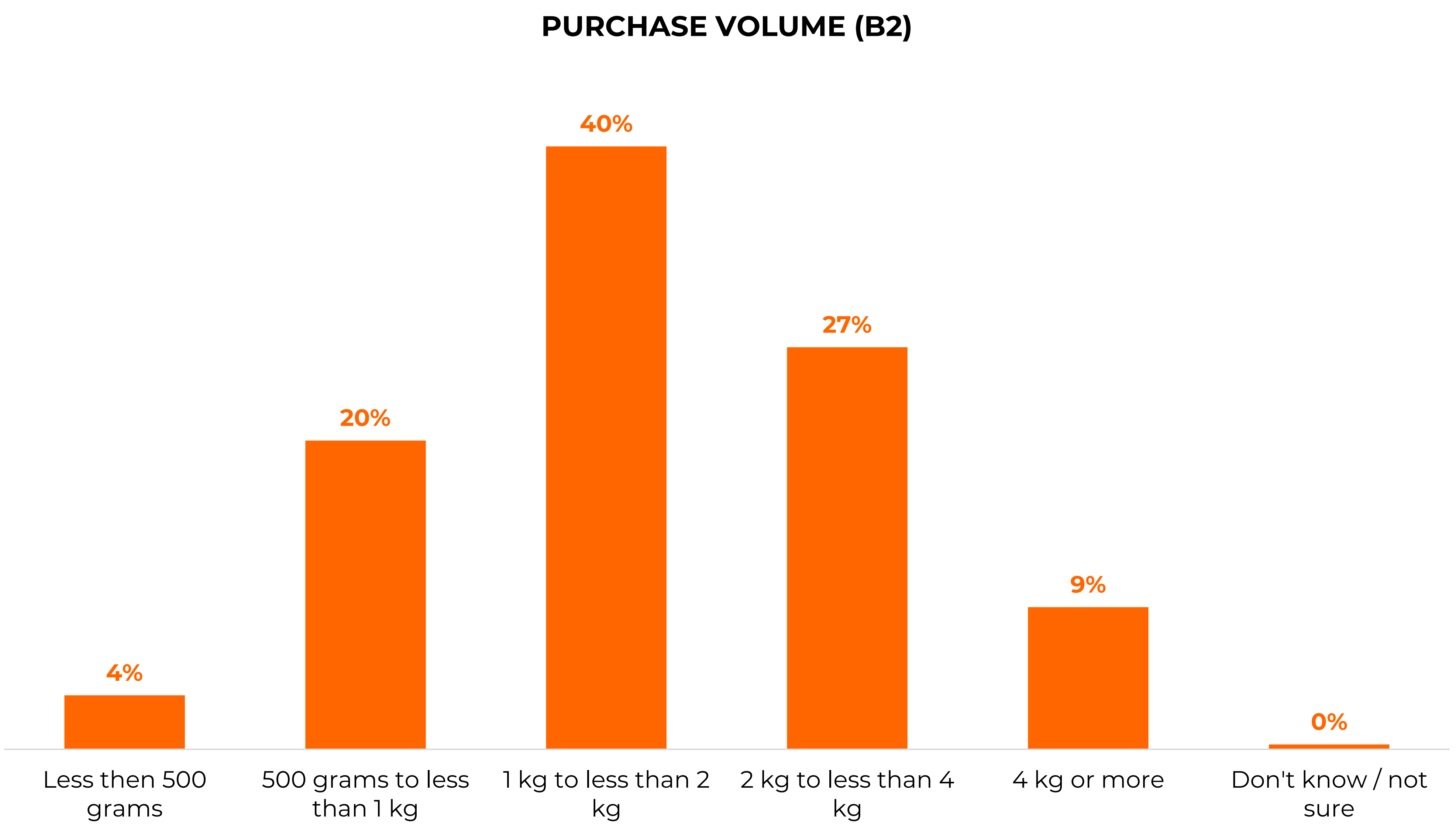
QB1: How often do you usually buy fresh fruit for your household?
Total N: 309

FRUIT PURCHASE VOLUME (B2): Fruit buying is fairly balanced, with most households purchasing 1–4 kg per week and some leaning toward either smaller or larger quantities



QB2: Thinking about the fruit you buy for your household, roughly how much do you usually buy in a typical week?
Total N: 311

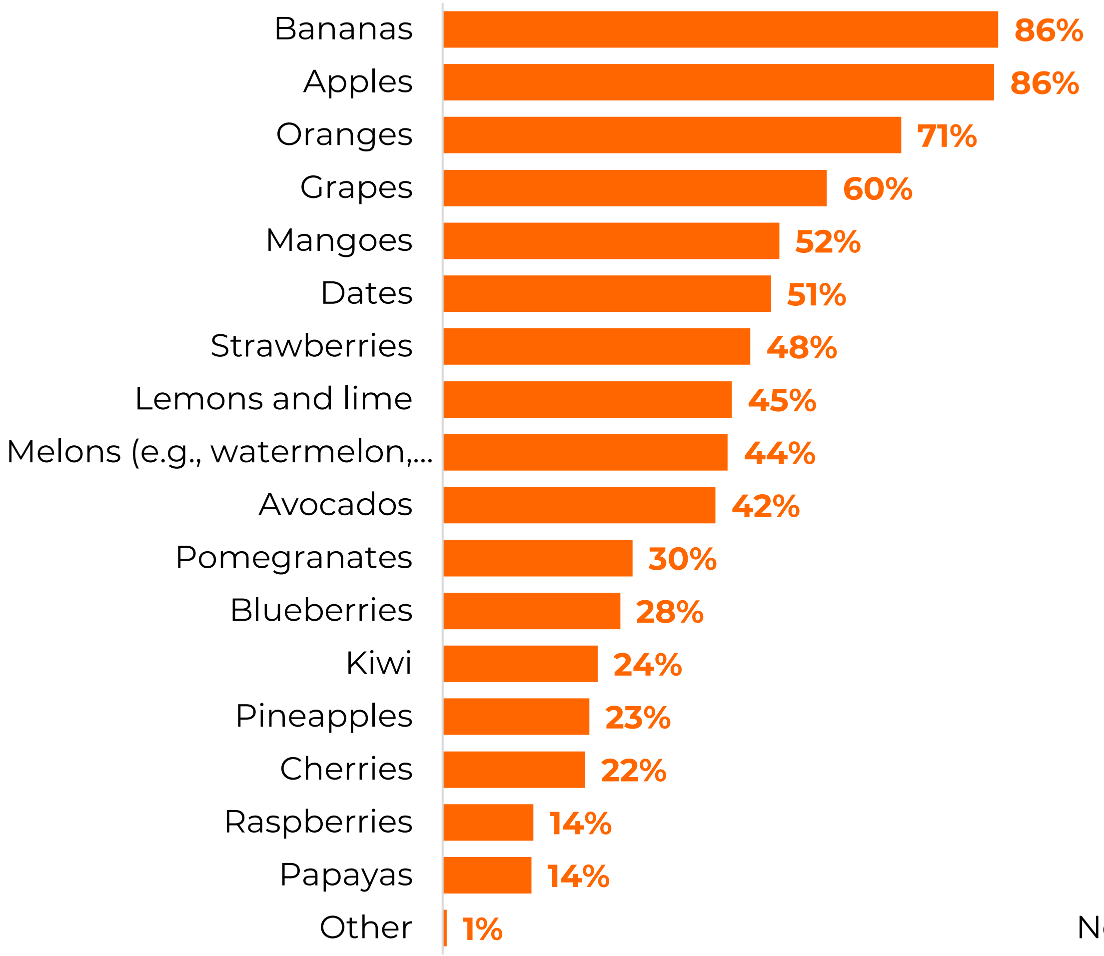
FRUIT PURCHASE VOLUME (B2): Weekly fruit purchases are typically moderate, with two-thirds of households buying between 1 and 4 kg.



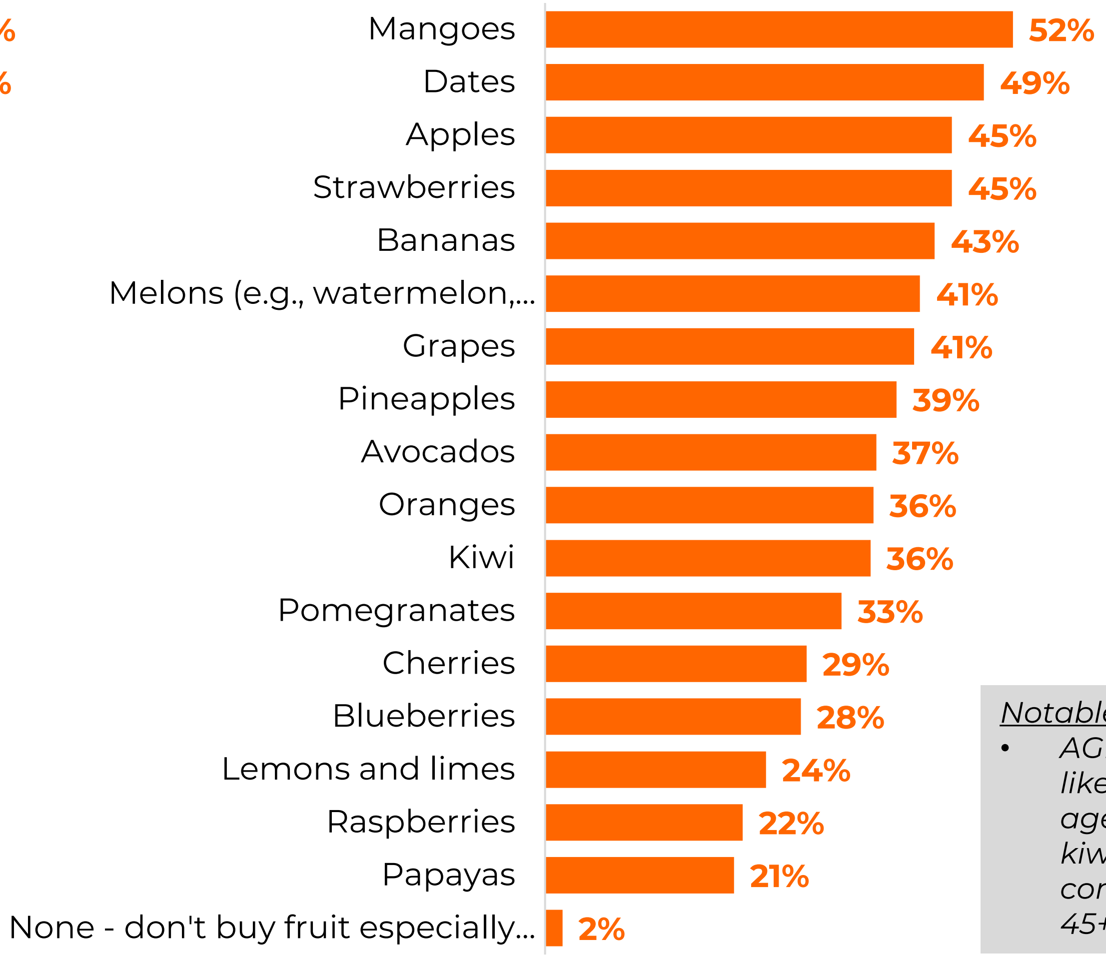
QB2: Thinking about the fruit you buy for your household, roughly how much do you usually buy in a typical week?
Total N: 309

FRUIT TYPES PURCHASED (B3a/B3b): Fruit preferences show overlap between everyday and special occasions, with apples and bananas dominating daily use and mangoes and dates standing out for celebrations

EVERY DAY (B3a)



SPECIAL OCCASIONS (B3b)



Notable subgroup differences:

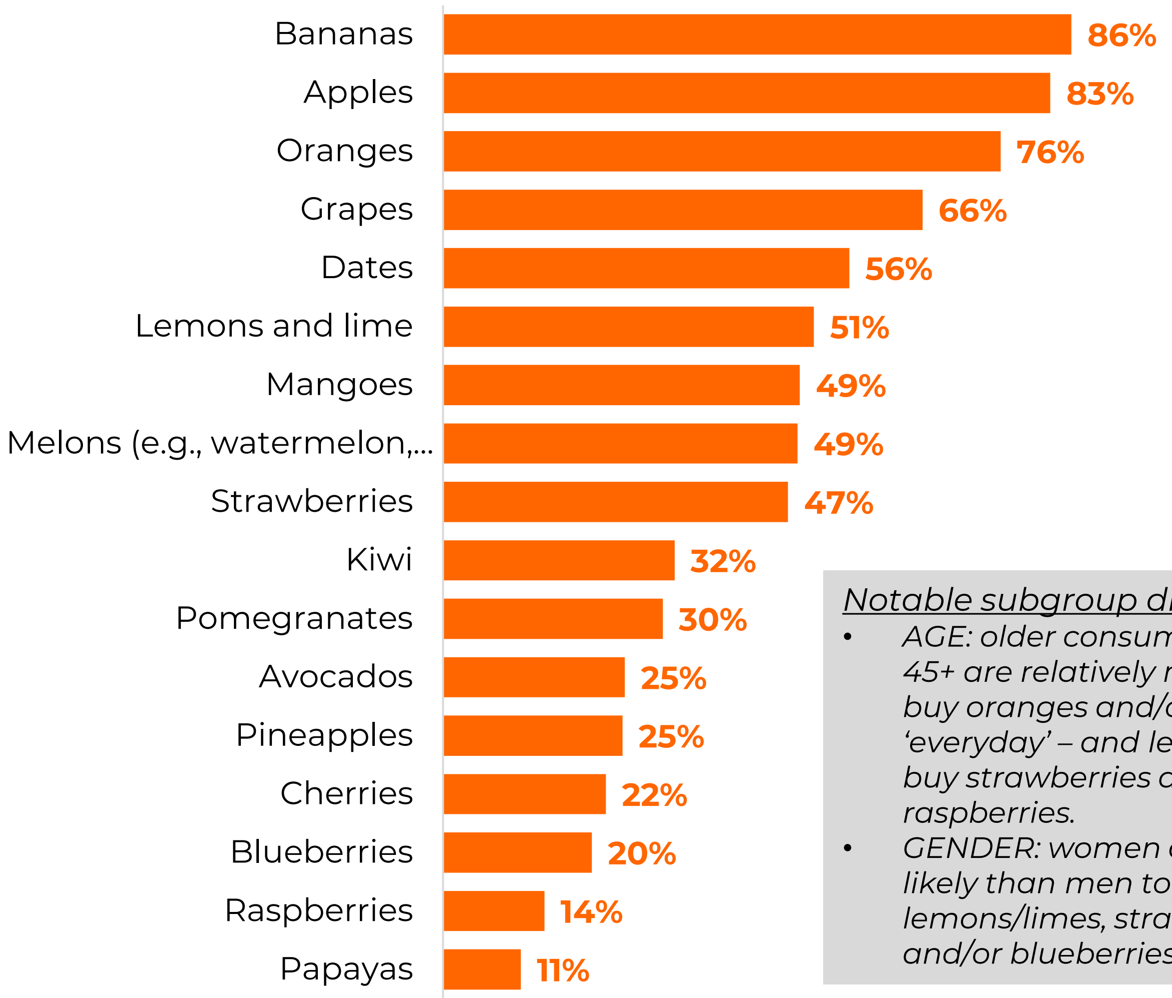
- *AGE: kiwis are much more likely to be bought by those aged 31-44 (44% buying kiwis for special occasions) compared to those aged 45+ (25%)*

QB3a: Which types of fruit do you buy for 'everyday' consumption?
Total N: 311

QB3b: Which types of fruit do you buy but more usually for 'special occasions' (for example Ramadan, Eid, or a special family occasion etc.) rather than 'everyday consumption'?
Total N: 309

FRUIT TYPES PURCHASED (B3a/B3b): Fruit preferences show high overlap between occasions, with bananas/apples/oranges top for both everyday and special occasions.

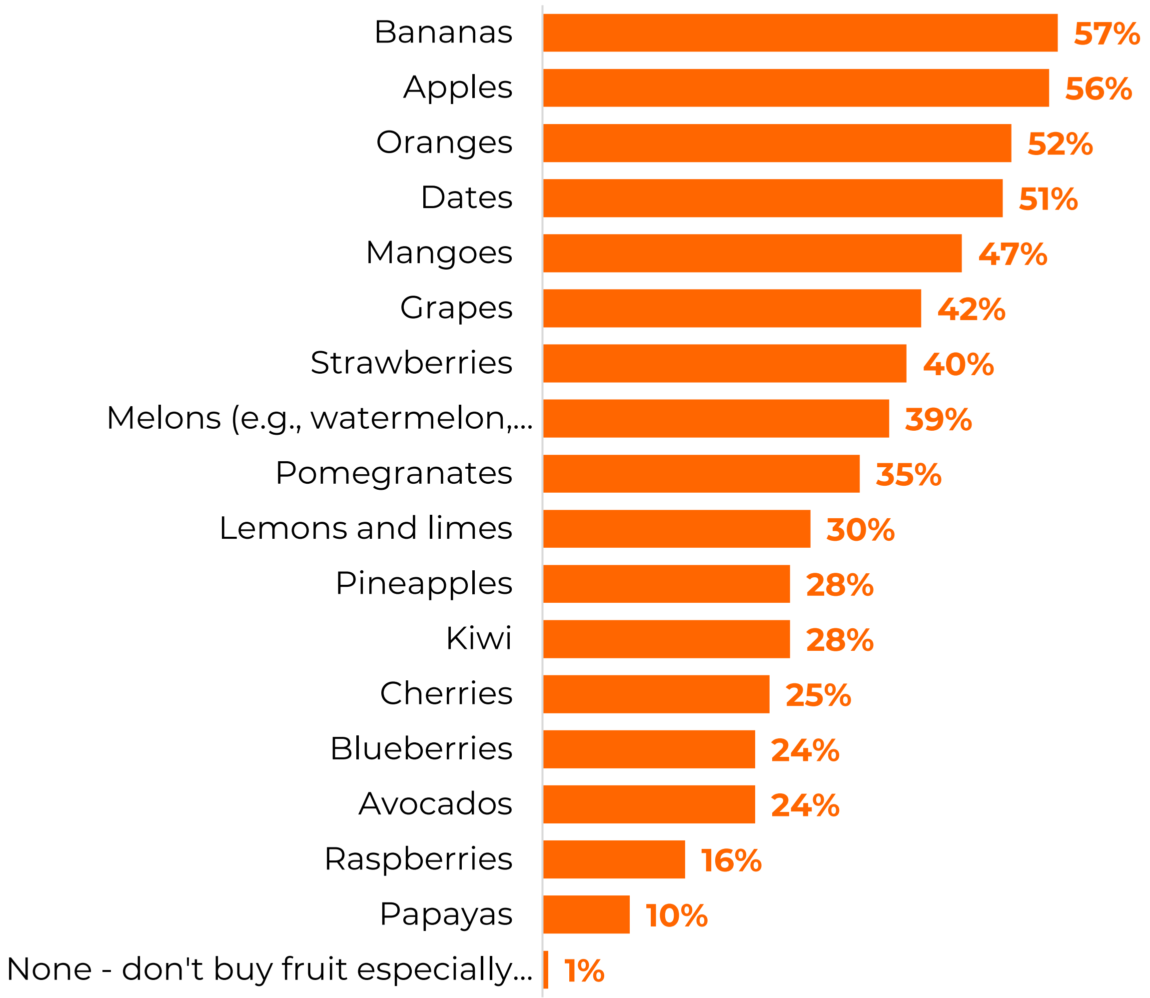
EVERY DAY (B3a)



Notable subgroup differences:

- *AGE: older consumers aged 45+ are relatively more likely to buy oranges and/or grapes 'everyday' – and less likely to buy strawberries and/or raspberries.*
- *GENDER: women are more likely than men to buy lemons/limes, strawberries and/or blueberries.*

SPECIAL OCCASIONS (B3b)

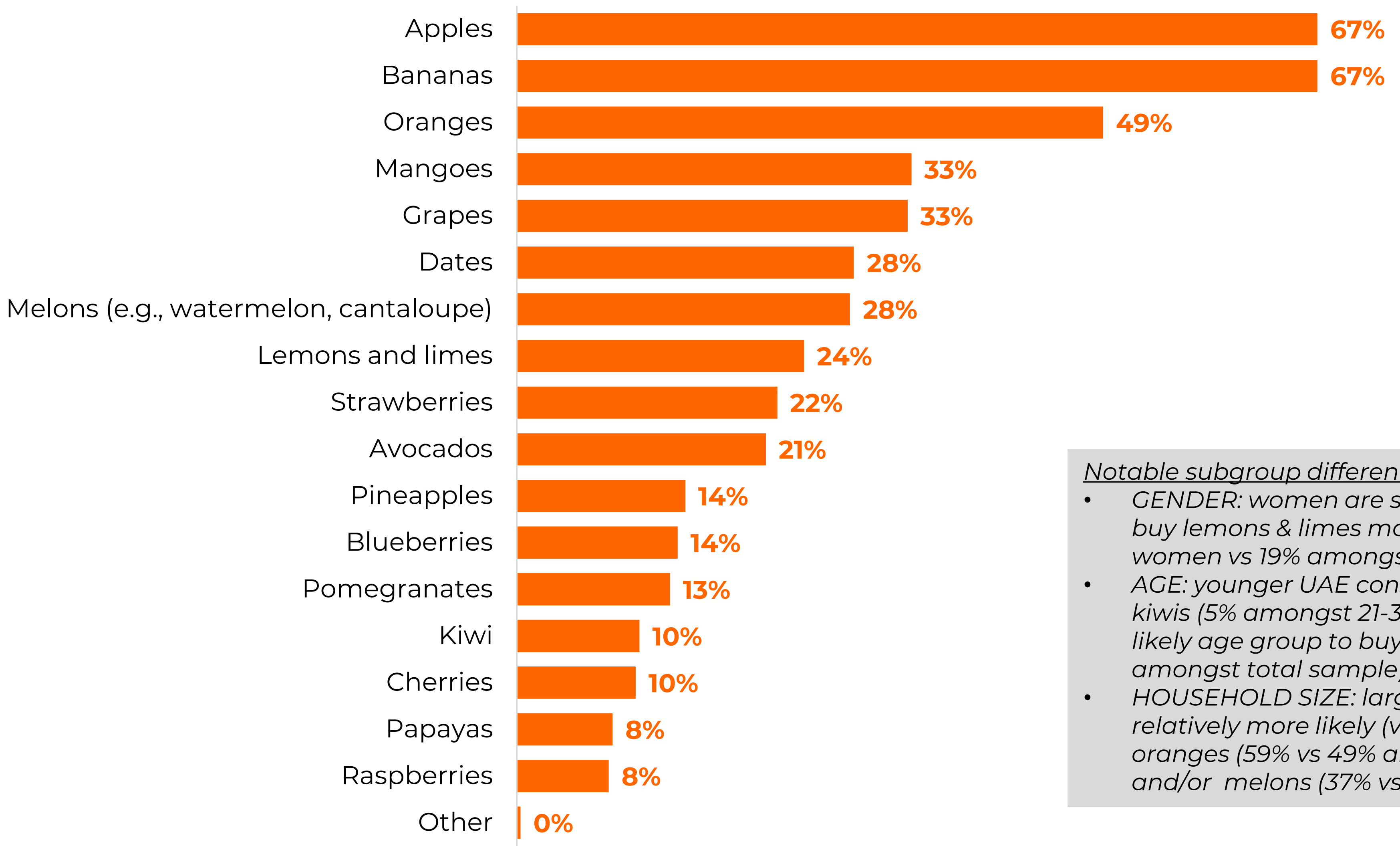


QB3a: Which types of fruit do you buy for 'everyday' consumption?
Total N: 309

QB3b: Which types of fruit do you buy but more usually for 'special occasions' (for example Ramadan, Eid, or a special family occasion etc.) rather than 'everyday consumption'?
Total N: 309

FRUIT TYPES PURCHASED – MOST OFTEN (B4): Apples and bananas dominate purchase habits, while oranges, mangoes, and grapes form the next most common group.

EVERY DAY (B4)

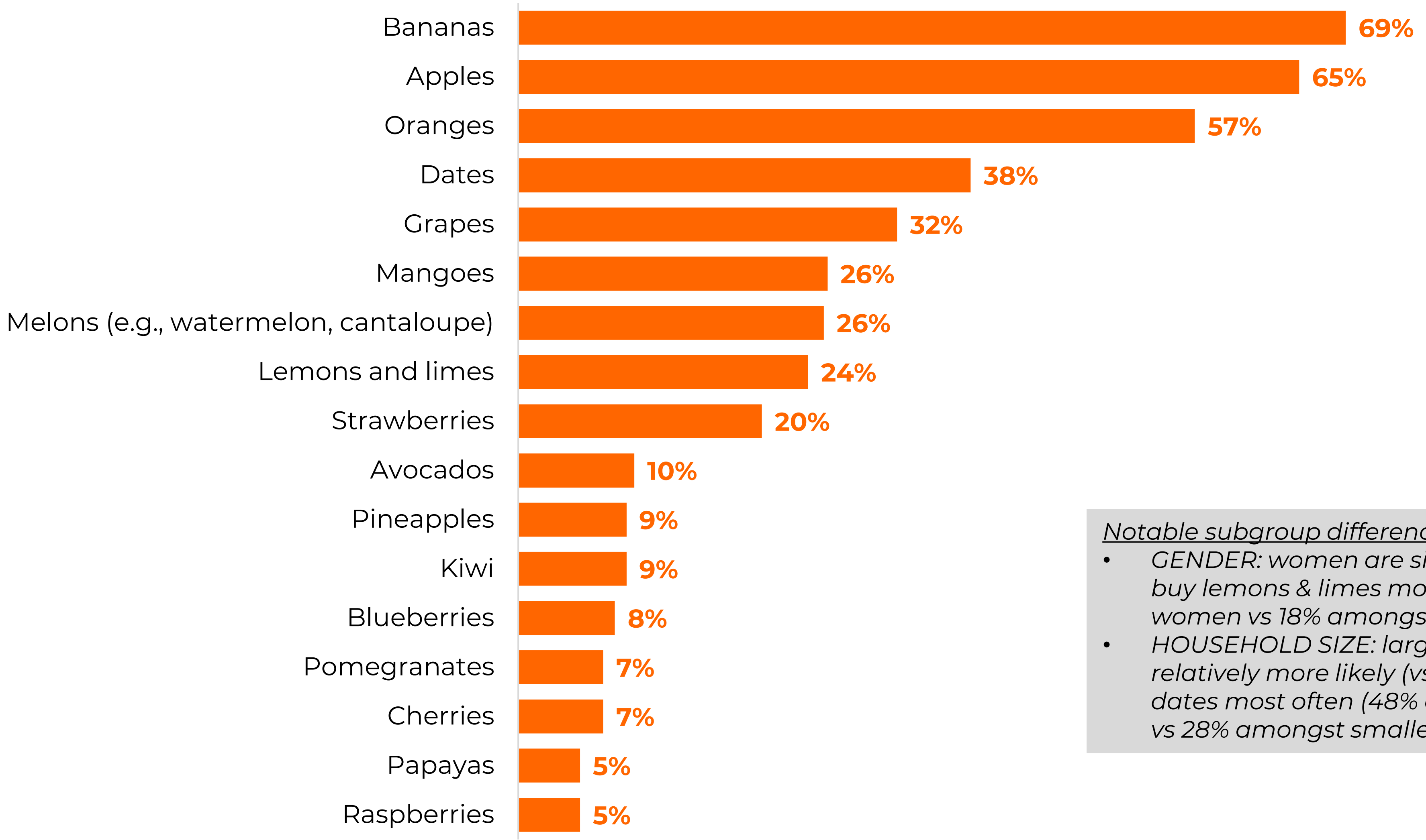


Notable subgroup differences:
- *GENDER: women are significantly more likely to buy lemons & limes most often (32% amongst women vs 19% amongst men)*
- *AGE: younger UAE consumers are less likely to buy kiwis (5% amongst 21-30 year olds); 21-30s are most likely age group to buy pineapples (24% vs 14% amongst total sample)*
- *HOUSEHOLD SIZE: larger h/holds of 5+ people are relatively more likely (vs smaller h/holds) to buy oranges (59% vs 49% amongst total sample) and/or melons (37% vs 28% amongst total sample)*

QB4: So, overall which types of fruit would you say that you buy most often – for any occasions?
Total N: 311

FRUIT TYPES PURCHASED – MOST OFTEN (B4): Bananas, apples, and oranges are the most frequently purchased fruits, with dates and grapes also commonly bought.

EVERY DAY (B4)



Notable subgroup differences:

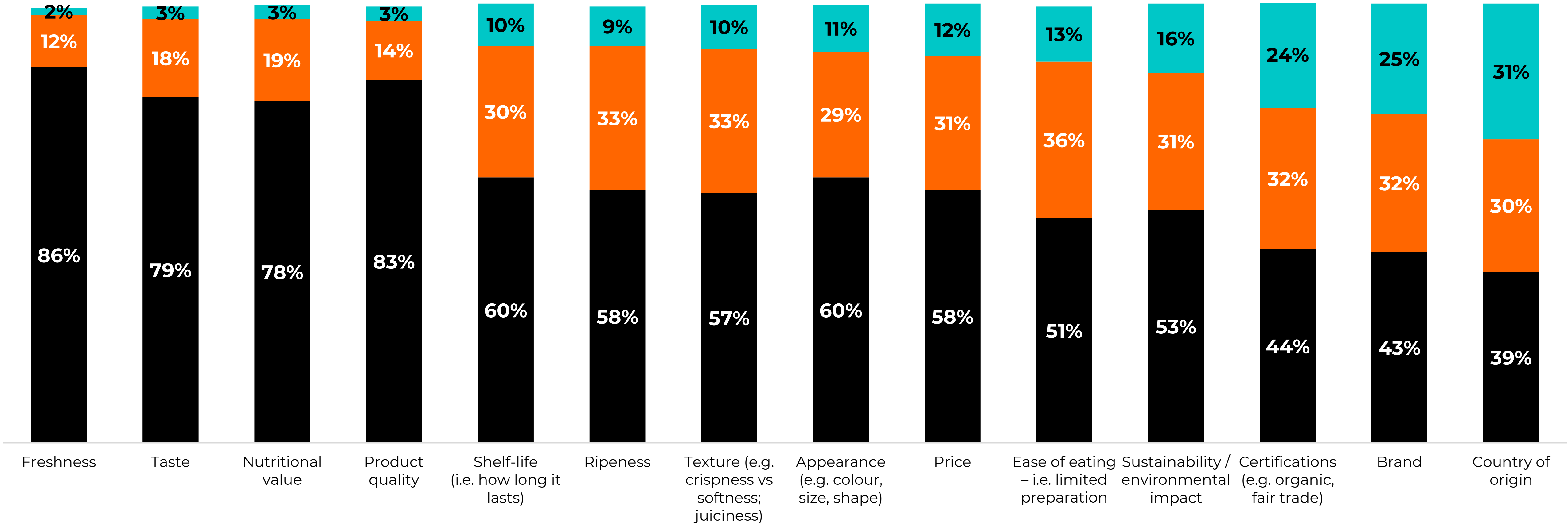
- *GENDER: women are significantly more likely to buy lemons & limes most often (34% amongst women vs 18% amongst men)*
- *HOUSEHOLD SIZE: larger h/holds of 5+ people are relatively more likely (vs smaller h/holds) to buy dates most often (48% amongst larger households vs 28% amongst smaller households)*

QB4: So, overall which types of fruit would you say that you buy most often – for any occasions?
Total N: 309

CHOICE DRIVERS (C1): Freshness, taste, nutritional value, and overall quality are the top priorities when choosing fruit, while consumers claim that brand and country of origin matter less.

IMPORTANCE RATING (C1)

Notable subgroup differences:
- *AGE: 'certifications' are significantly more important to younger consumers (86% top-2 score amongst 21-30 year olds) and less important amongst older consumers (66% top-2 score amongst those aged 45 or above)*



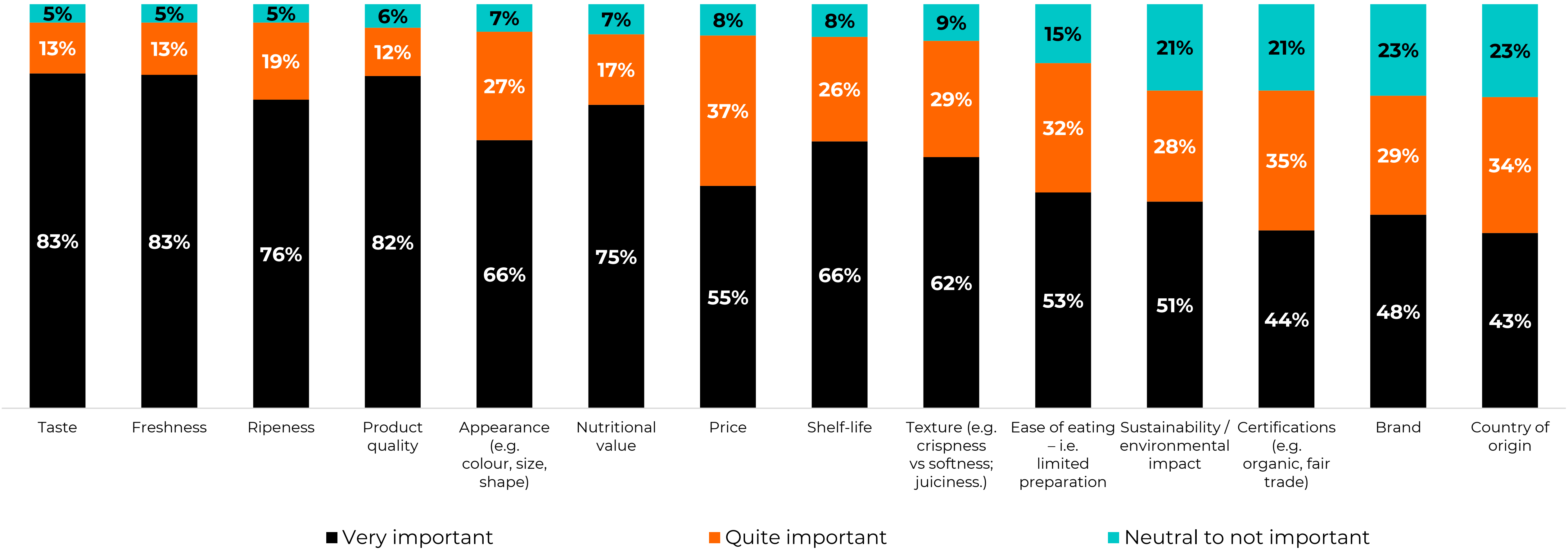
QC1: How important are each of the following factors for you personally when choosing which fruit to buy?
Total N: 311

CHOICE DRIVERS (C1): Taste, freshness, ripeness, and quality are the top stated choice drivers. Consumers claim that brand and country of origin are relatively less important in driving their choices.

IMPORTANCE RATING (C1)

<u>Notable subgroup differences</u>:

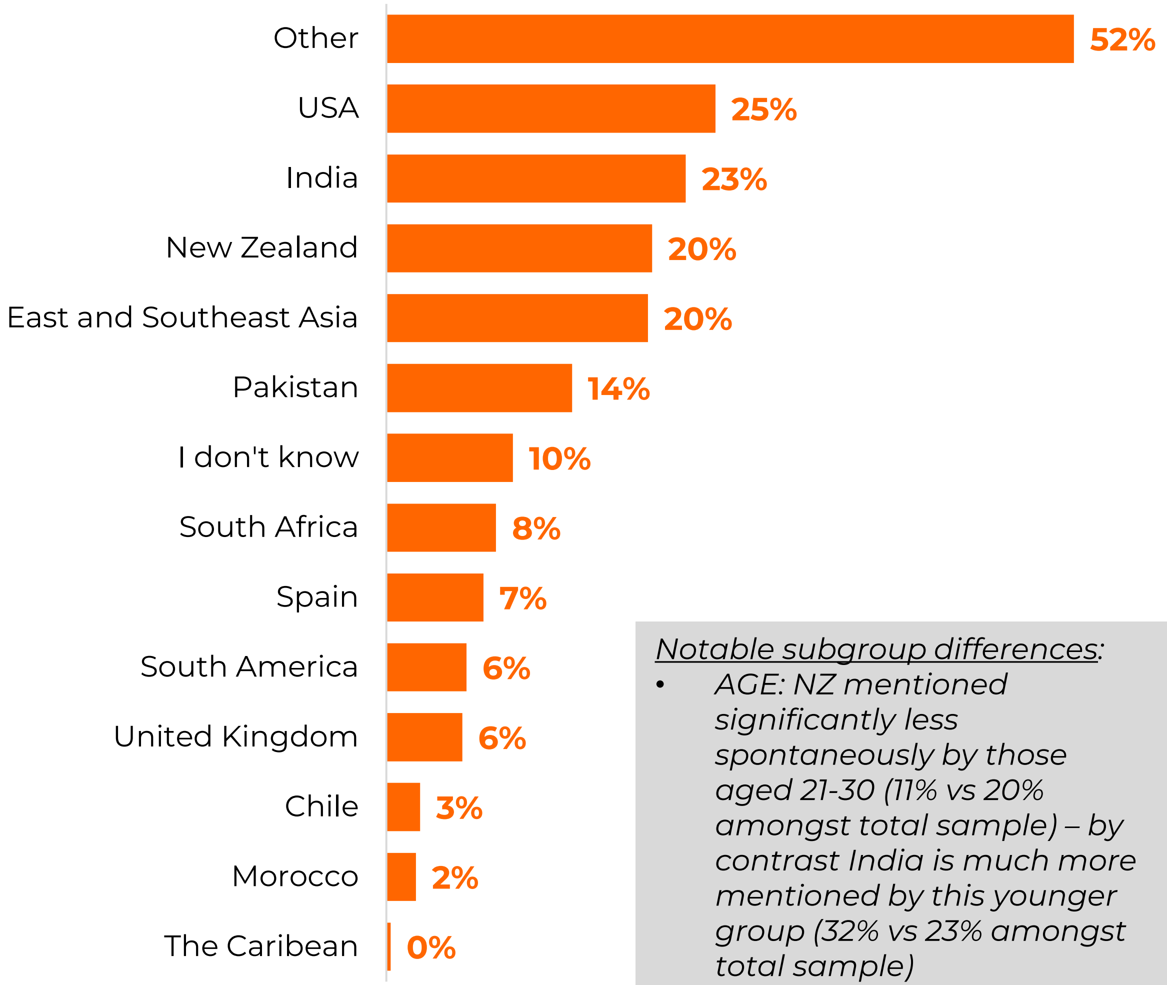
- *INCOME: 'brand' and/or 'ease of eating' are relatively more important to those with high income (86% & 91% respectively) – and much less important to those with low income (66% and 75% respectively).*



QC1: How important are each of the following factors for you personally when choosing which fruit to buy?
Total N: 309

COUNTRIES ASSOCIATED WITH <u>HIGH QUALITY FRUIT</u> (D1/D2): The USA, New Zealand, and India make up the top-3 markets associated with high-quality fruit (both spontaneously and when prompted)

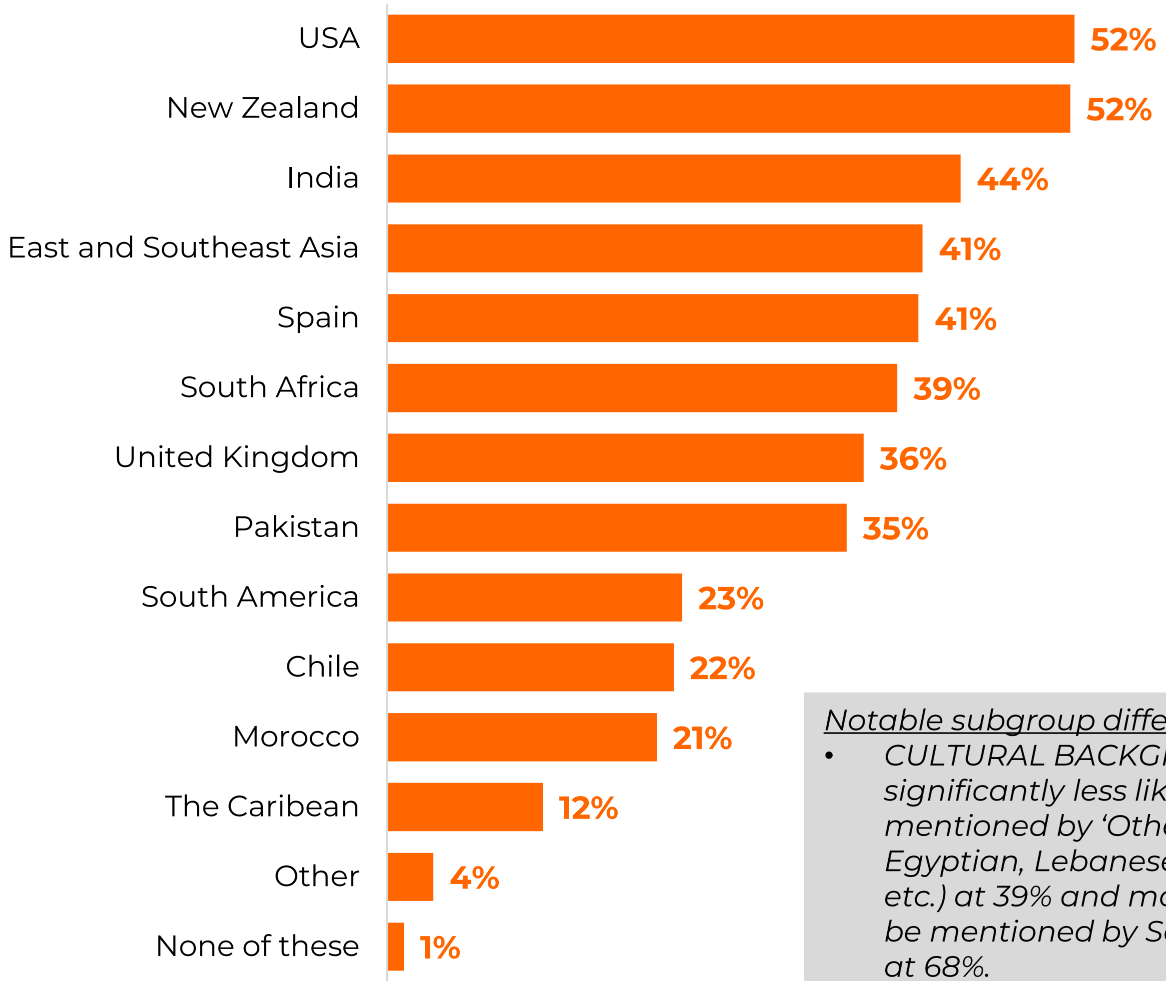
SPONTANEOUS (D1)



<u>Notable subgroup differences</u>:

- *AGE: NZ mentioned significantly less spontaneously by those aged 21-30 (11% vs 20% amongst total sample) – by contrast India is much more mentioned by this younger group (32% vs 23% amongst total sample)*

PROMPTED (D2)



<u>Notable subgroup differences</u>:

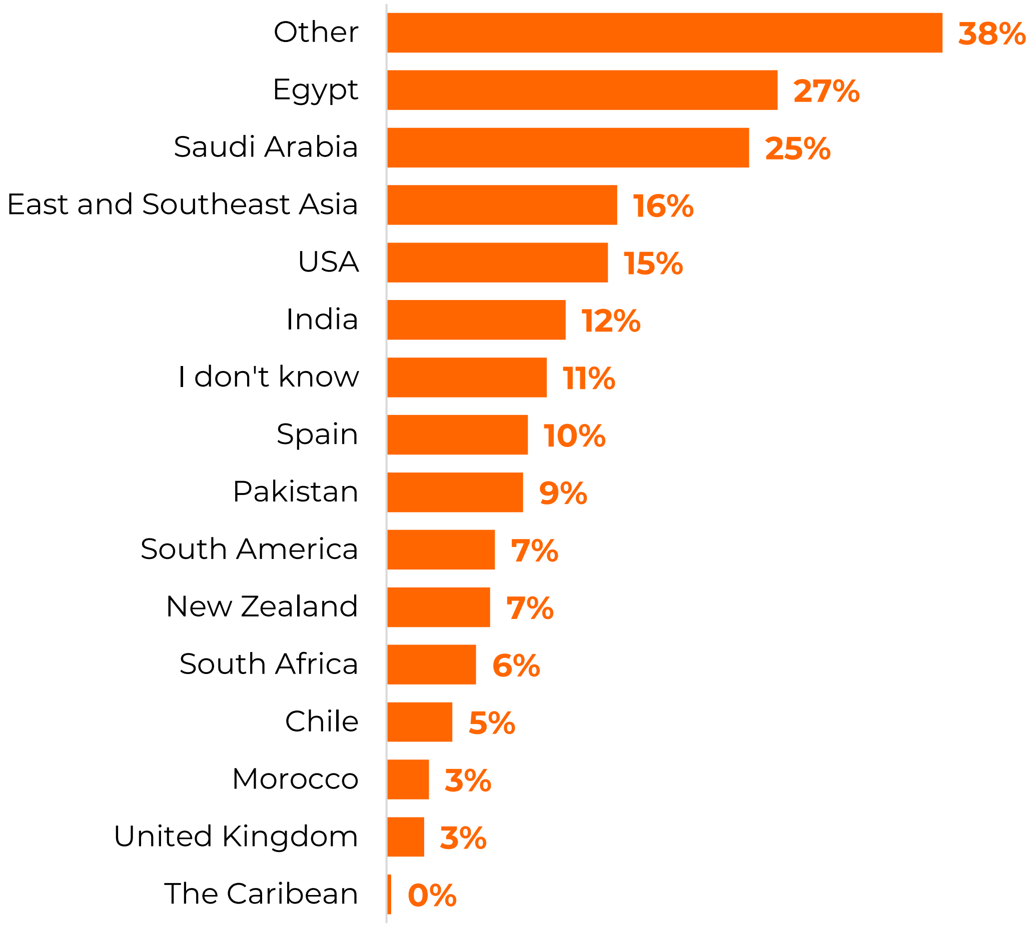
- *CULTURAL BACKGROUND: NZ significantly less likely to be mentioned by 'Other Arabs (e.g. Egyptian, Lebanese, Jordanian etc.) at 39% and more likely to be mentioned by South Asians at 68%.*

QD1: If you think of high-quality fruit, which countries of origin come to your mind?
Total N: 311

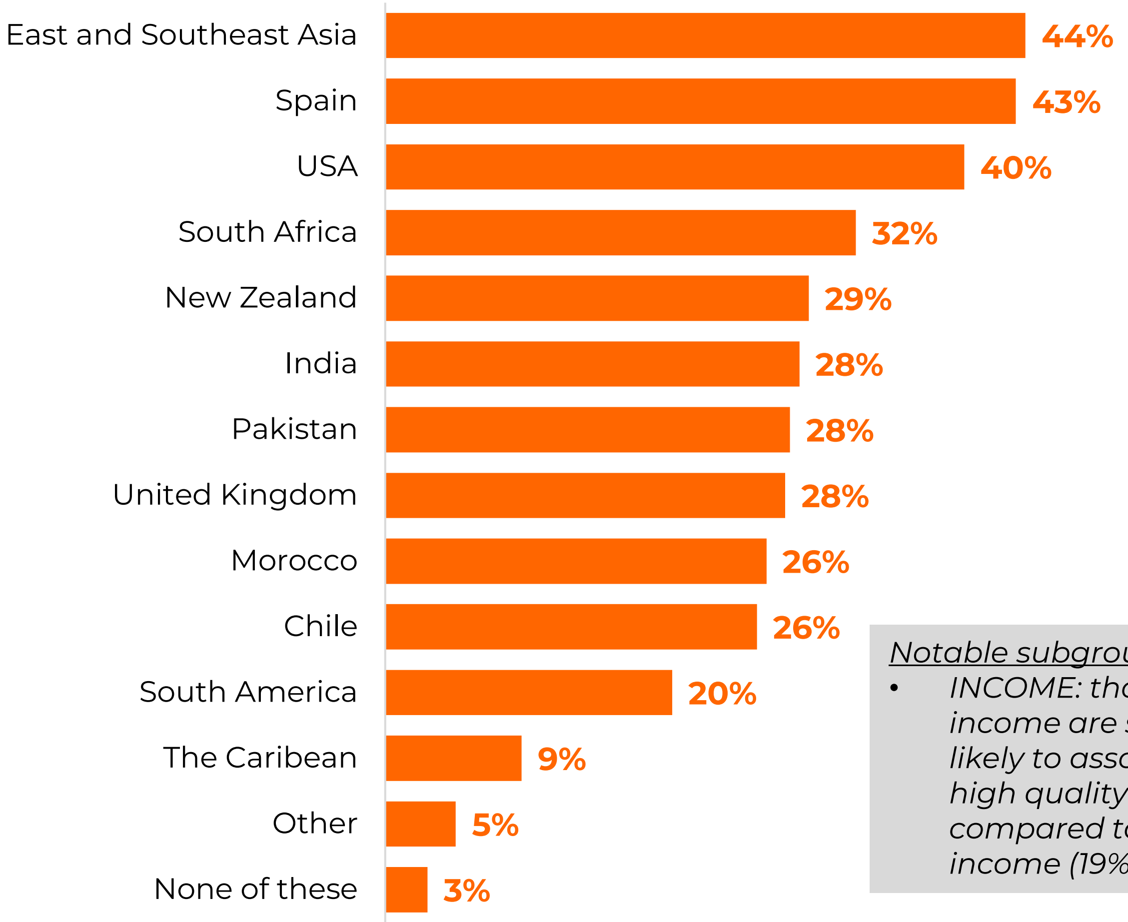
QD2: And which, if any, of the following countries or regions of origin do you associate with high-quality fruit?
Total N: 311

COUNTRIES ASSOCIATED WITH <u>HIGH QUALITY FRUIT</u> (D1/D2): Egypt and KSA itself have the highest spontaneous associations with quality fruit, followed by East & Southeast Asia. Spain and USA are close behind when prompted, with South Africa 4th and New Zealand in 5th place (prompted).

SPONTANEOUS (D1)



PROMPTED (D2)



<u>Notable subgroup differences</u>:
- *INCOME: those with high income are significantly more likely to associate NZ with high quality fruit (39%) compared to those with low income (19%)*

QD1: If you think of high-quality fruit, which countries of origin come to your mind?
Total N: 309

QD2: And which, if any, of the following countries or regions of origin do you associate with high-quality fruit?
Total N: 309

FRUIT FEATURES X COUNTRIES (D3): New Zealand fruit is rated #1 on 12 out of 16 characteristics – and on most of these the USA is a close #2. The USA is #1 on 2 characteristics – with NZ a close #2. The exceptions are 'value for money' and 'cheapest' on which India has the strongest associations.

	New Zealand	Chile	East and Southeast Asia	India	Morocco	Pakistan	South Africa	South America	Spain	The Caribbean	United Kingdom	USA
Best appearance	51%	22%	31%	27%	23%	28%	31%	22%	38%	16%	27%	42%
Best product quality	48%	19%	28%	30%	16%	26%	33%	22%	36%	14%	29%	48%
Has most certifications	47%	17%	24%	26%	18%	24%	23%	20%	31%	13%	32%	45%
I try to buy fruit from this country if I can	47%	21%	27%	36%	19%	28%	31%	22%	34%	15%	31%	38%
Has best known brands	47%	18%	27%	28%	17%	26%	26%	21%	34%	11%	31%	48%
Has best texture	47%	21%	30%	31%	22%	28%	32%	20%	35%	13%	27%	37%
I trust the fruit from this country to be good	47%	19%	29%	34%	23%	29%	33%	21%	37%	15%	28%	42%
Best nutritional value	46%	20%	30%	32%	21%	30%	34%	21%	35%	14%	31%	45%
Is worth paying more for	46%	18%	29%	27%	21%	24%	29%	19%	32%	14%	30%	36%
Best taste	45%	16%	30%	36%	20%	30%	27%	22%	34%	15%	24%	38%
Freshest	44%	21%	30%	33%	20%	30%	32%	22%	35%	13%	29%	41%
Best sustainability	43%	19%	26%	28%	18%	25%	29%	21%	34%	12%	29%	36%
Best shelf-life	42%	20%	29%	31%	17%	26%	30%	18%	31%	11%	28%	44%
Has best ripeness level	42%	19%	32%	34%	19%	28%	32%	20%	33%	13%	27%	35%
Best value for money	38%	22%	33%	45%	20%	33%	30%	16%	27%	15%	24%	32%
Cheapest	20%	11%	26%	56%	17%	49%	22%	12%	16%	7%	12%	14%

QD3: For each statement please select the fruit grown from which countries or regions that you most associate with that statment
Total N: 311

FRUIT FEATURES X COUNTRIES (D3): For KSA consumers Spain, East & South East Asia and the USA typically occupy the top-3 slots on most attributes. New Zealand fruit is typically in 4th or 5th. The exceptions are ‘value for money’ and ‘cheapest’ on which New Zealand is further behind

	New Zealand	Chile	East and Southeast Asia	India	Morocco	Pakistan	South Africa	South America	Spain	The Caribean	United Kingdom	USA
Best product quality	28%	23%	31%	17%	23%	21%	22%	15%	35%	13%	25%	31%
Best appearance	28%	21%	33%	16%	23%	23%	22%	18%	32%	7%	22%	30%
Best nutritional value	28%	23%	36%	20%	27%	23%	25%	21%	35%	10%	25%	29%
Has best known brands	27%	19%	27%	17%	21%	19%	24%	16%	32%	11%	27%	36%
I trust the fruit from this country to be good	27%	22%	35%	14%	25%	25%	28%	17%	37%	10%	22%	35%
Is worth paying more for	26%	18%	28%	13%	20%	21%	26%	14%	32%	8%	21%	28%
Best taste	26%	20%	33%	19%	21%	28%	23%	15%	34%	7%	20%	27%
Freshest	25%	20%	35%	16%	27%	20%	23%	16%	30%	9%	22%	30%
I try to buy fruit from this country if I can	25%	25%	31%	18%	22%	23%	25%	20%	37%	11%	21%	31%
Has best texture	25%	19%	34%	21%	23%	22%	26%	21%	31%	11%	22%	29%
Best sustainability	24%	18%	24%	16%	22%	20%	21%	16%	28%	8%	22%	32%
Has most certifications	24%	15%	23%	16%	18%	16%	20%	19%	30%	7%	26%	33%
Has best ripeness level	23%	18%	32%	20%	24%	20%	28%	18%	28%	11%	20%	28%
Best shelf-life	23%	20%	30%	16%	20%	20%	23%	16%	29%	8%	23%	35%
Best value for money	20%	18%	32%	21%	22%	27%	24%	17%	25%	13%	20%	23%
Cheapest	15%	17%	30%	29%	23%	25%	20%	9%	14%	6%	12%	15%

QD3: For each statement please select the fruit grown from which countries or regions that you most associate with that statment
Total N: 309

PREFERRED COUNTRY OF ORIGIN X FRUITS (D4): New Zealand is the clear preferred source for kiwifruit and holds a strong position (1st or 2nd) for apples, blueberries, strawberries, avocados, pomegranates, and grapes

	New Zealand	Chile	East and Southeast Asia	India	Morocco	Pakistan	South Africa	South America	Spain	The Caribbean	United Kingdom	USA
Kiwi (N=32)	31%	0%	6%	9%	0%	9%	16%	9%	0%	0%	3%	16%
Apples (N=206)	25%	6%	7%	5%	3%	3%	8%	3%	4%	0%	4%	29%
Blueberries (N=42)	24%	7%	0%	7%	5%	2%	0%	0%	12%	10%	5%	24%
Strawberries (N=68)	22%	0%	9%	4%	6%	3%	12%	4%	13%	3%	9%	12%
Avocados (N=65)	15%	2%	11%	9%	0%	3%	28%	6%	6%	3%	0%	12%
Pomegranates (N=40)	15%	3%	8%	25%	8%	13%	8%	5%	0%	3%	3%	10%
Grapes (N=102)	15%	3%	11%	13%	5%	9%	8%	1%	14%	1%	8%	8%
Cherries (N=31)	13%	10%	10%	13%	6%	3%	6%	3%	16%	0%	10%	6%
Oranges (N=153)	12%	3%	10%	6%	7%	11%	18%	5%	10%	1%	1%	12%
Lemons and limes (N=75)	9%	3%	7%	24%	5%	7%	11%	7%	7%	0%	4%	7%
Melons (e.g., watermelon, cantaloupe) (N=87)	9%	0%	22%	13%	8%	13%	2%	3%	5%	3%	0%	3%
Raspberries (N=24)	8%	13%	13%	0%	13%	4%	4%	4%	13%	4%	0%	25%
Bananas (N=209)	5%	5%	25%	20%	2%	7%	9%	10%	2%	2%	1%	8%
Pineapples (N=44)	5%	5%	25%	23%	0%	2%	9%	9%	0%	0%	5%	9%
Papayas (N=25)	4%	0%	24%	24%	0%	20%	4%	4%	16%	0%	0%	4%
Dates (N=88)	3%	0%	23%	5%	30%	7%	2%	0%	3%	0%	2%	9%
Mangoes (N=103)	3%	0%	10%	21%	3%	44%	10%	1%	2%	2%	3%	1%

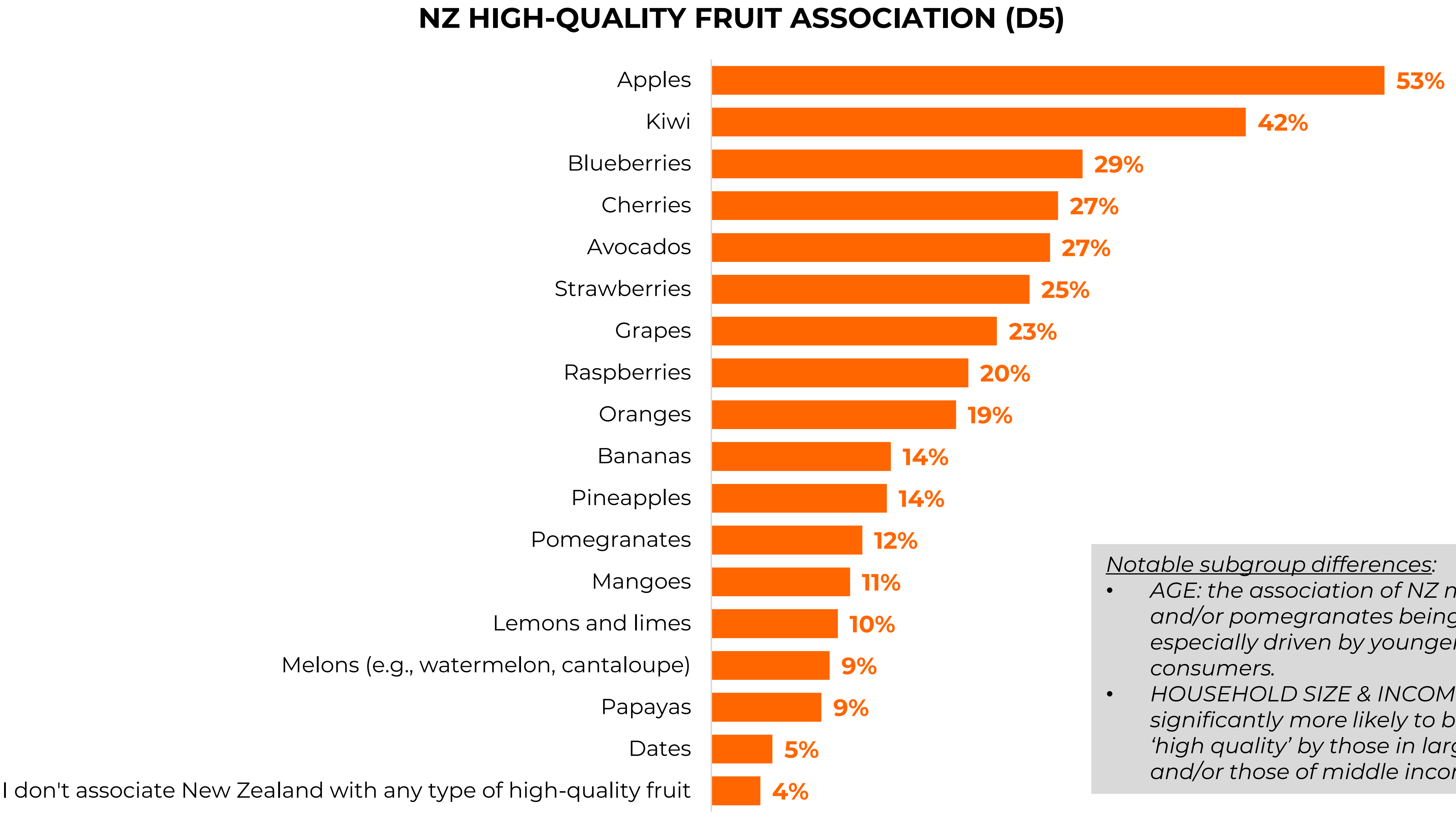
QD4: For each of the types of fruit that you buy most often, which country or region of origin do you prefer?
Total N: Depending on answers in B4

PREFERRED COUNTRY OF ORIGIN X FRUITS (D4): Among all countries, New Zealand stands out as the most preferred source for blueberries and is among the top-3 choices for strawberries, pomegranates, and apples.

	New Zealand	Chile	East and Southeast Asia	India	Morocco	Pakistan	South Africa	South America	Spain	The Caribbean	United Kingdom	USA
Blueberries (N=25)	24%	12%	4%	4%	8%	8%	4%	4%	0%	0%	0%	24%
Strawberries (N=63)	14%	6%	11%	5%	11%	3%	5%	2%	8%	2%	2%	17%
Pomegranates (N=22)	14%	0%	14%	14%	9%	5%	5%	5%	5%	5%	9%	0%
Apples (N=202)	13%	12%	4%	4%	4%	5%	6%	2%	13%	1%	2%	22%
Cherries (N=22)	9%	14%	9%	0%	0%	5%	9%	5%	14%	5%	0%	14%
Melons (e.g., watermelon, cantaloupe) (N=79)	8%	4%	16%	3%	8%	14%	5%	5%	4%	0%	5%	4%
Kiwi (N=28)	7%	7%	21%	4%	4%	7%	0%	7%	11%	7%	4%	18%
Lemons and limes (N=75)	7%	1%	13%	5%	8%	4%	19%	1%	4%	1%	5%	12%
Avocados (N=30)	7%	7%	20%	0%	0%	0%	20%	3%	13%	0%	10%	20%
Papayas (N=16)	6%	6%	0%	38%	0%	6%	0%	0%	13%	0%	6%	13%
Raspberries (N=16)	6%	6%	0%	13%	6%	13%	25%	0%	6%	6%	0%	13%
Grapes (N=98)	5%	8%	11%	5%	9%	3%	6%	6%	13%	3%	6%	6%
Bananas (N=214)	5%	7%	31%	12%	3%	6%	12%	9%	4%	1%	4%	2%
Mangoes (N=80)	4%	4%	11%	13%	4%	35%	8%	3%	9%	1%	4%	1%
Oranges (N=175)	3%	3%	11%	6%	10%	11%	16%	1%	17%	1%	3%	9%
Pineapples (N=28)	0%	4%	29%	11%	0%	11%	14%	7%	0%	7%	7%	7%
Dates (N=117)	0%	3%	18%	5%	15%	5%	3%	1%	0%	1%	1%	1%

QD4: For each of the types of fruit that you buy most often, which country or region of origin do you prefer?
Total N: Depending on answers in B4

NZ FRUIT TYPES SEEN AS 'HIGH QUALITY' (D5): New Zealand is most strongly associated with high-quality apples and kiwi, with blueberries, cherries, and avocados completing the top-5.



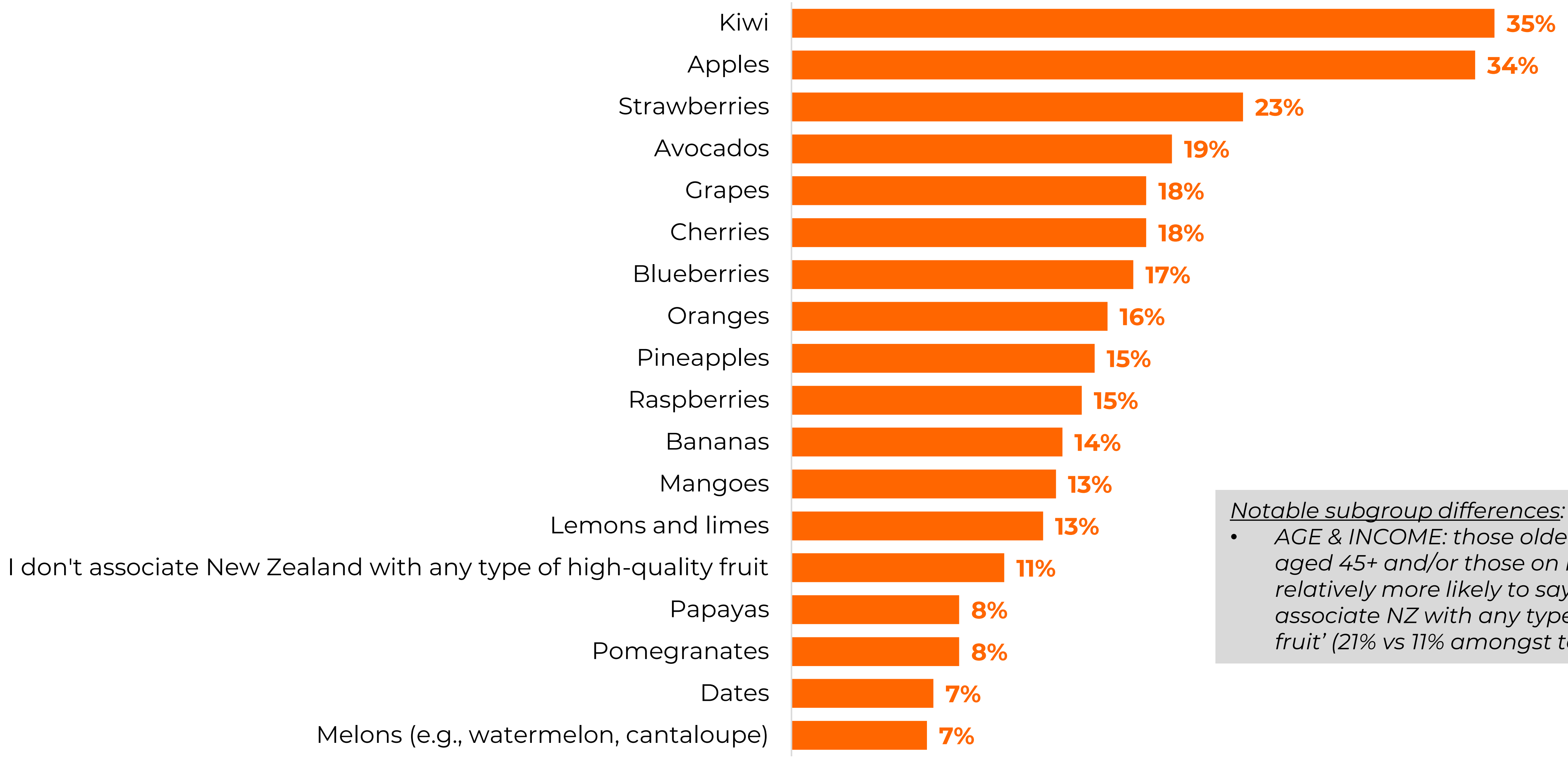
Notable subgroup differences:

- *AGE: the association of NZ mangoes, papayas and/or pomegranates being 'high quality' is especially driven by younger 21-30 year old consumers.*
- *HOUSEHOLD SIZE & INCOME: NZ kiwis are significantly more likely to be associated with being 'high quality' by those in larger 5+ size households and/or those of middle income.*

QD5: For which, if any, types of fruit do you particularly associate New Zealand as being a producer of high-quality fruit?
Total N: 311

NZ FRUIT TYPES SEEN AS ‘HIGH QUALITY’ (D5): New Zealand is most strongly associated with high-quality kiwi and apples, with strawberries, avocados, grapes and cherries the high-quality fruits next most associated with NZ.

NZ HIGH-QUALITY FRUIT ASSOCIATION (D5)



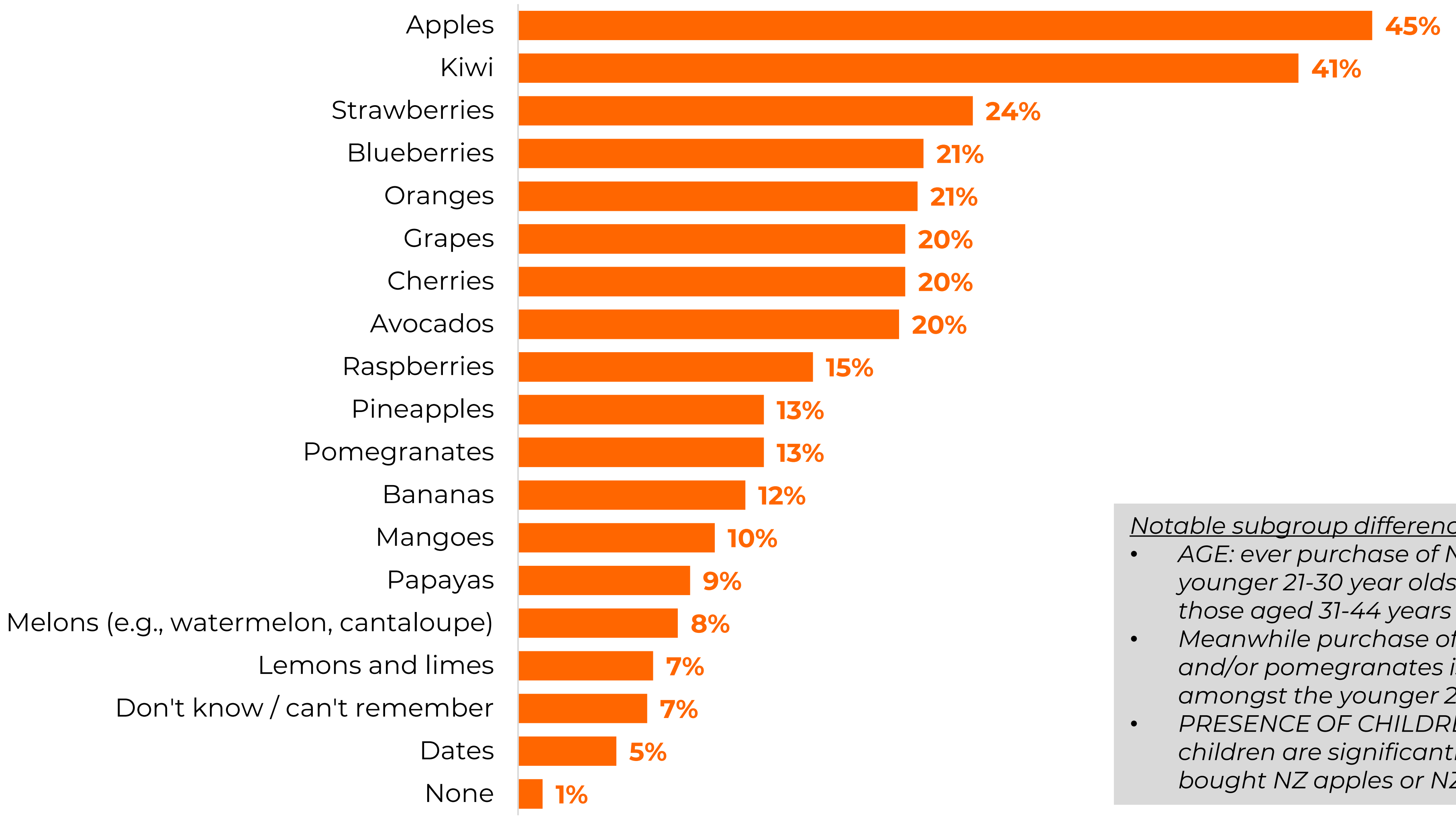
Notable subgroup differences:

- *AGE & INCOME: those older consumers aged 45+ and/or those on lower income are relatively more likely to say they ‘don’t associate NZ with any type of high-quality fruit’ (21% vs 11% amongst total sample)*

QD5: For which, if any, types of fruit do you particularly associate New Zealand as being a producer of high-quality fruit?
Total N: 309

NZ FRUIT TYPES EVER BOUGHT (D6): The NZ-sourced fruits UAE consumers are most likely to have bought are apples and kiwis.

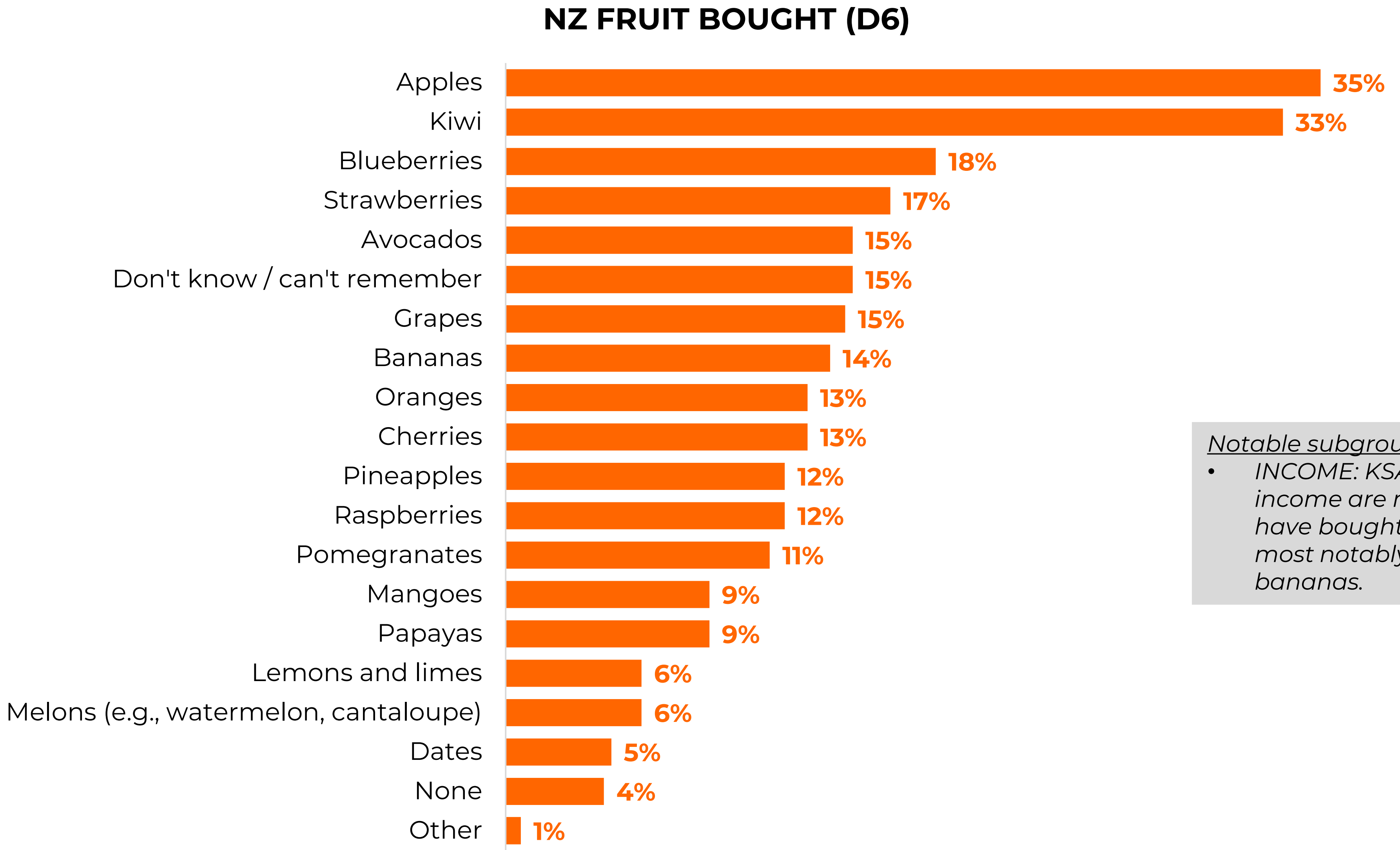
NZ FRUIT BOUGHT (D6)



Notable subgroup differences:
- *AGE: ever purchase of NZ apples is lower amongst younger 21-30 year olds (32%) and higher amongst those aged 31-44 years (54%).*
- *Meanwhile purchase of NZ bananas, papayas, and/or pomegranates is higher than average amongst the younger 21-30 year olds.*
- *PRESENCE OF CHILDREN: those WITHOUT children are significantly LESS LIKELY to have ever bought NZ apples or NZ kiwis.*

QD6: Which, if any, types of fruit grown in New Zealand have you ever purchased?
Total N: 311

NZ FRUIT TYPES EVER BOUGHT (D6): Apples and kiwis are the most commonly purchased New Zealand fruits.



Notable subgroup differences:
- *INCOME: KSA consumers with a higher income are more likely than average to have bought various types of NZ fruit, most notably apples, blueberries, and/or bananas.*

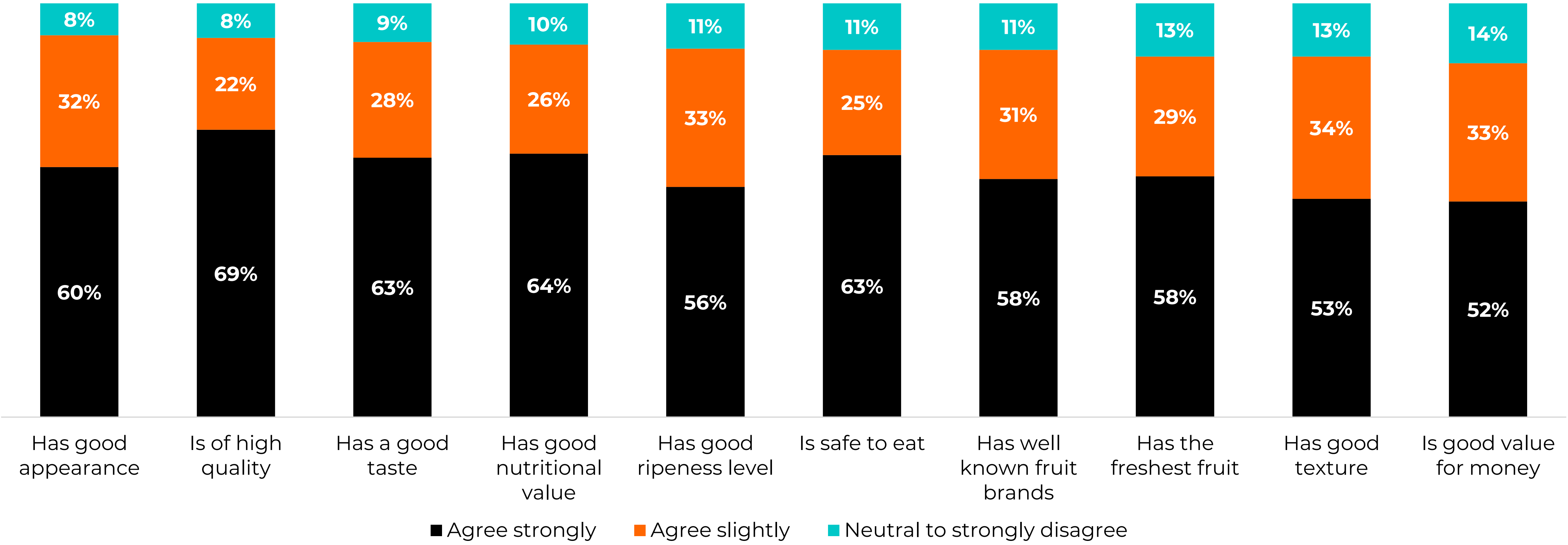
QD6: Which, if any, types of fruit grown in New Zealand have you ever purchased?
Total N: 309

NZ FRUIT ASSOCIATIONS (D9): New Zealand fruit is most recognized for its appearance, quality, taste and nutritional value.

<u>Notable subgroup differences</u>:

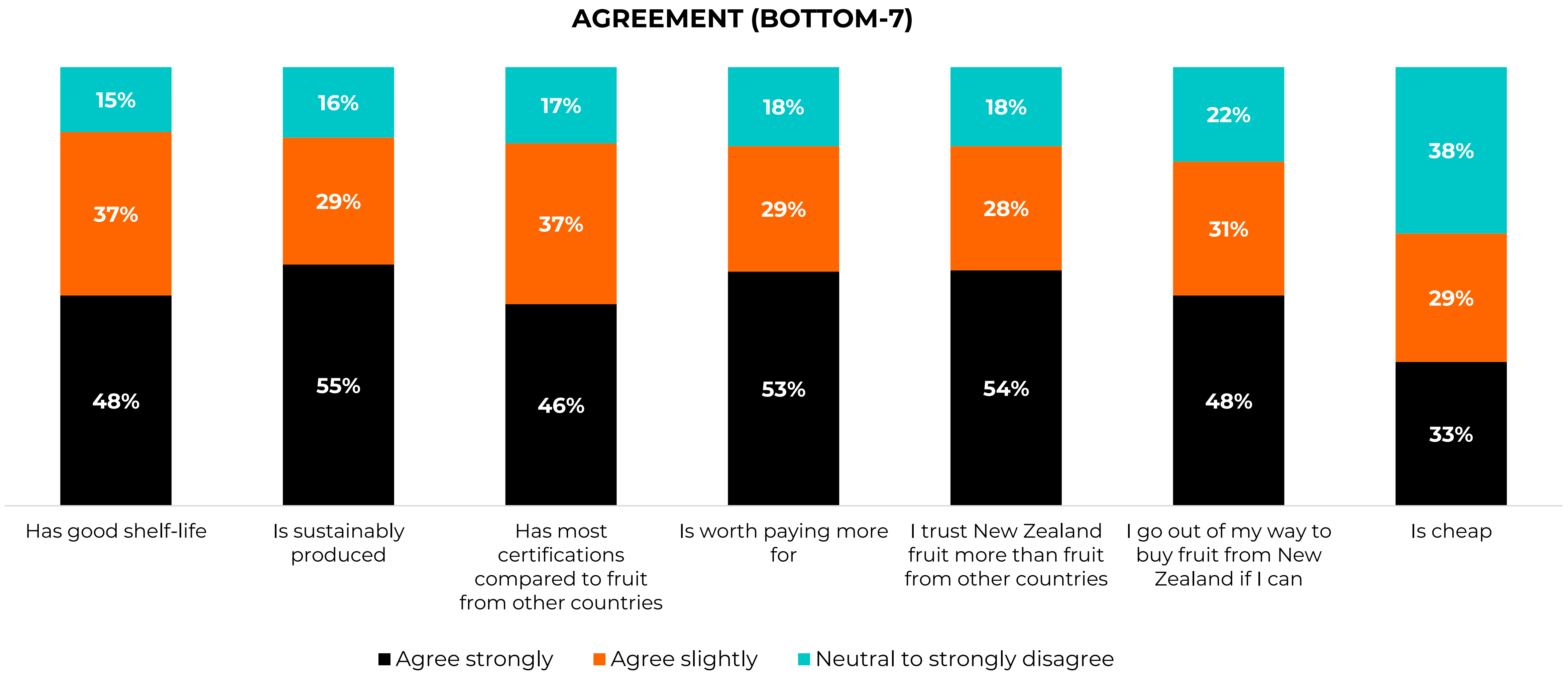
- *HOUSEHOLD SIZE: those in larger 5+ household sizes are relatively more likely to agree that NZ fruit is 'good value for money', 'has good nutritional value', 'worth paying more for' and/or that they 'go out of their way to buy NZ fruit'.*

AGREEMENT (TOP-10)



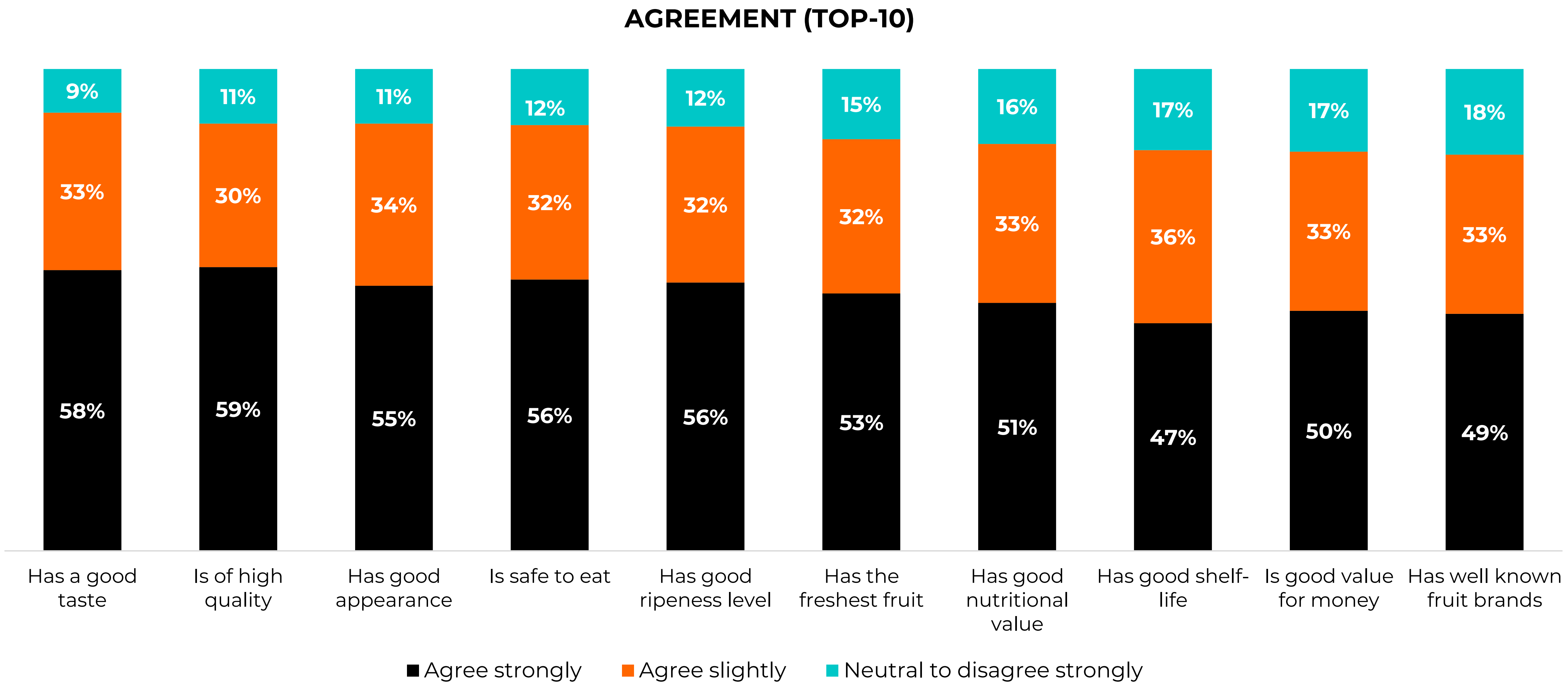
QD9: We would like to know for each statement to what extent you believe it applies to fruit from New Zealand?
Total N: 311

NZ FRUIT ASSOCIATIONS (D9): NZ fruit is relatively much less likely to be seen as ‘cheap’.



QD9: We would like to know for each statement to what extent you believe it applies to fruit from New Zealand?
Total N: 311

NZ FRUIT ASSOCIATIONS (D9): KSA consumers are most likely to associate NZ fruit with being tasty, high-quality, with good appearance, safe to eat and with good ripeness.



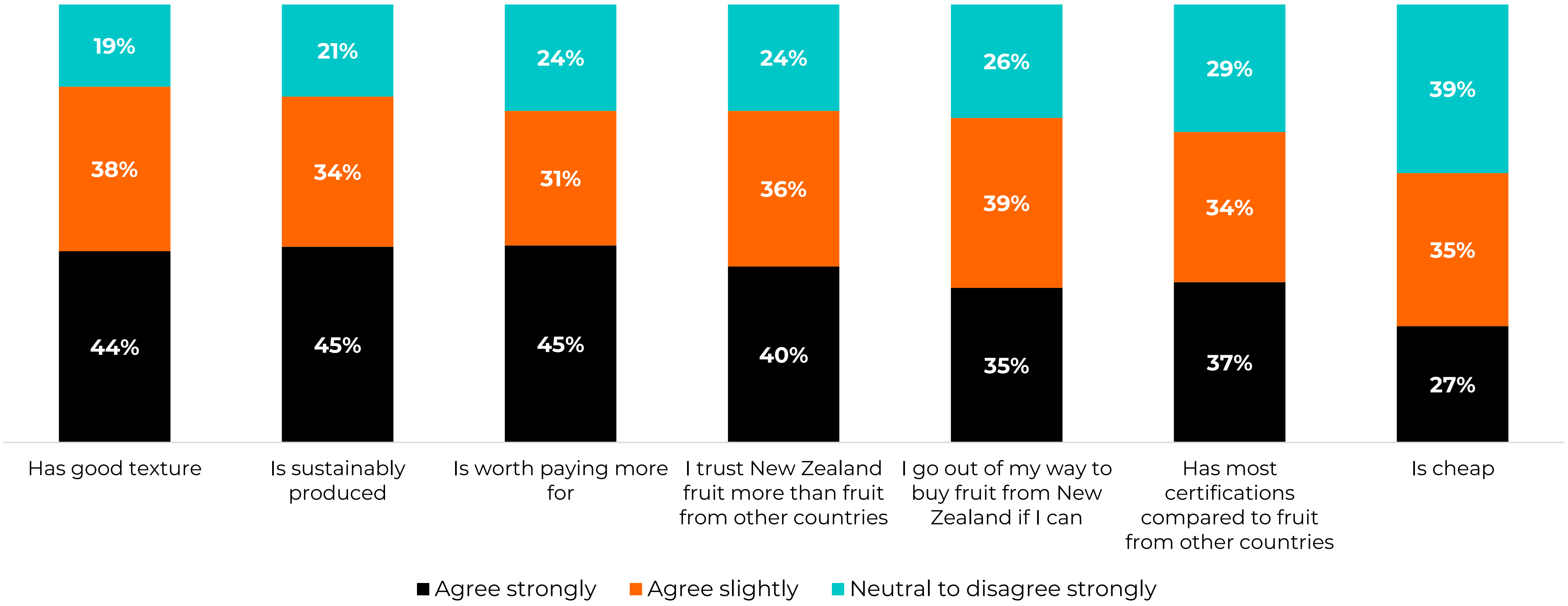
QD9: We would like to know for each statement to what extent you believe it applies to fruit from New Zealand?
Total N: 309

NZ FRUIT ASSOCIATIONS (D9): NZ fruit is relatively much less likely to be seen as 'cheap'.

Notable subgroup differences:

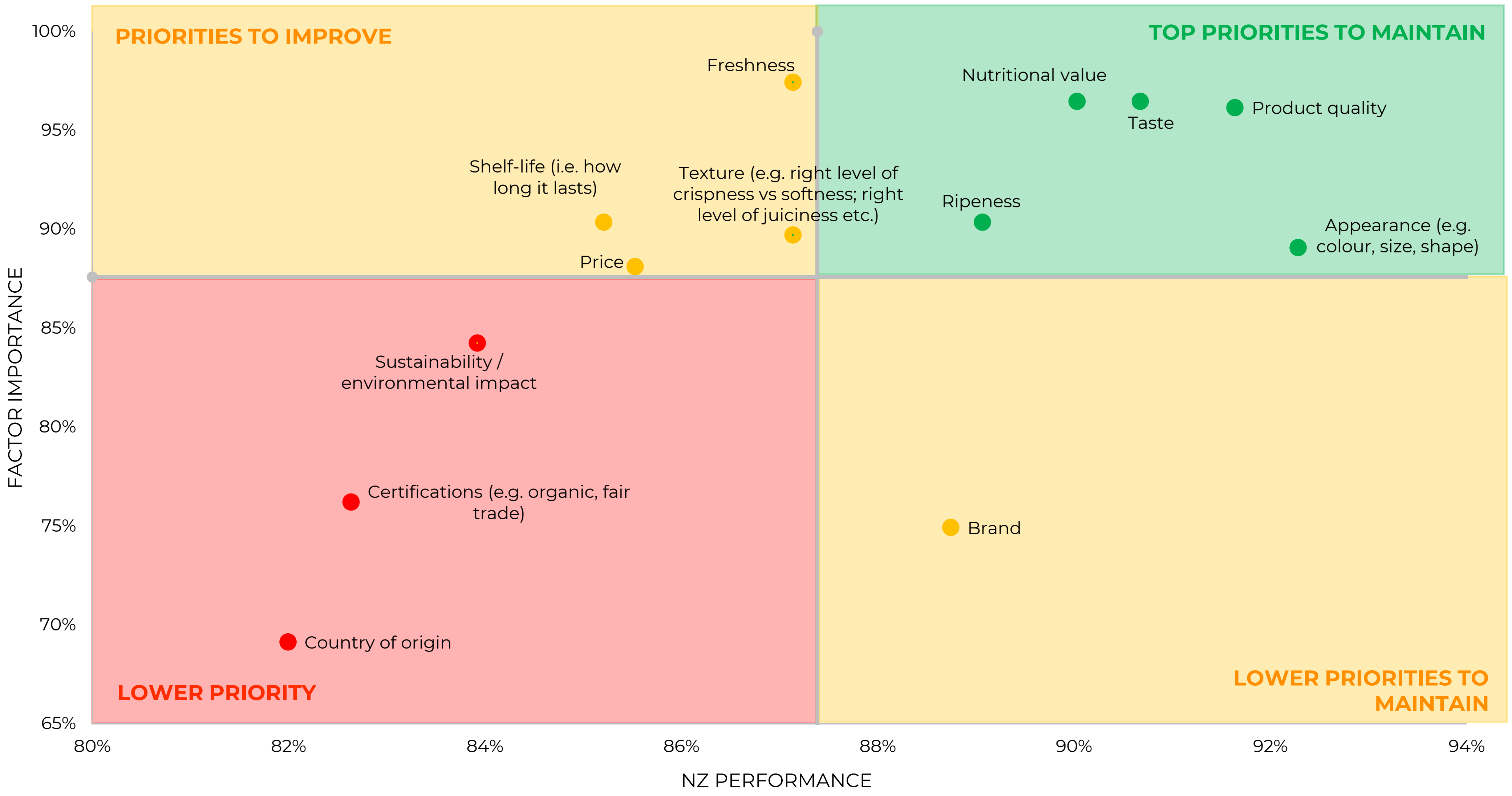
- *AGE: younger consumers aged 21-30 are significantly more likely than older consumers aged 45+ to see NZ fruit as 'cheap' (75% amongst 21-30s vs 44% amongst those aged 45+)*

AGREEMENT (BOTTOM-7)



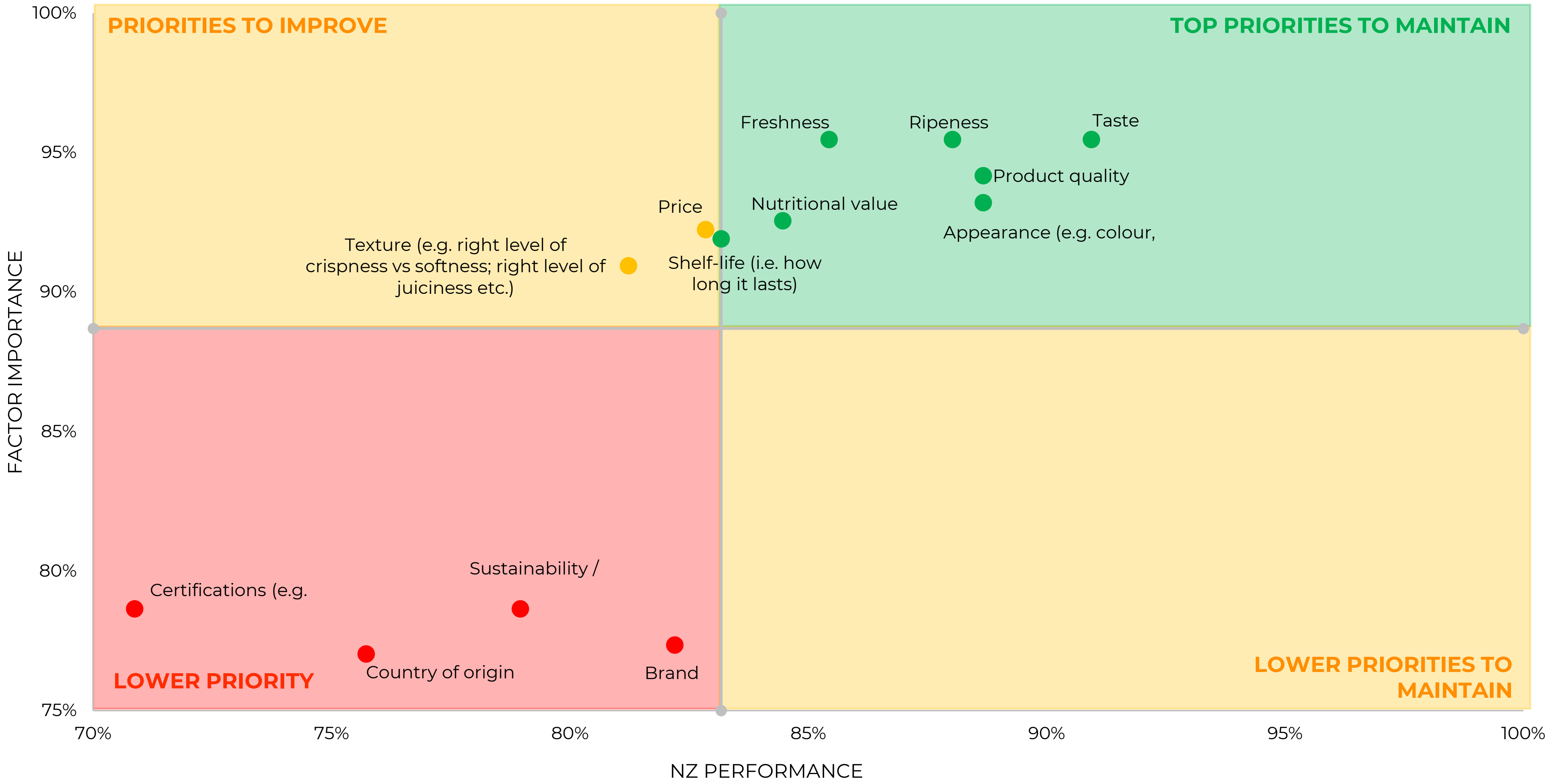
QD9: We would like to know for each statement to what extent you believe it applies to fruit from New Zealand?
Total N: 309

NZ FRUIT SUCCES FACTORS (C1xD9): Key opportunities to strengthen NZ associations are on 'shelf life', 'price', 'freshness', and 'texture'.



*QC1: How important are each of the following factors for you personally when choosing which fruit to buy (TOP-2)? * QD9: We would like to know for each statement to what extent you believe it applies to fruit from New Zealand (TOP-2)?*
Total N: 311

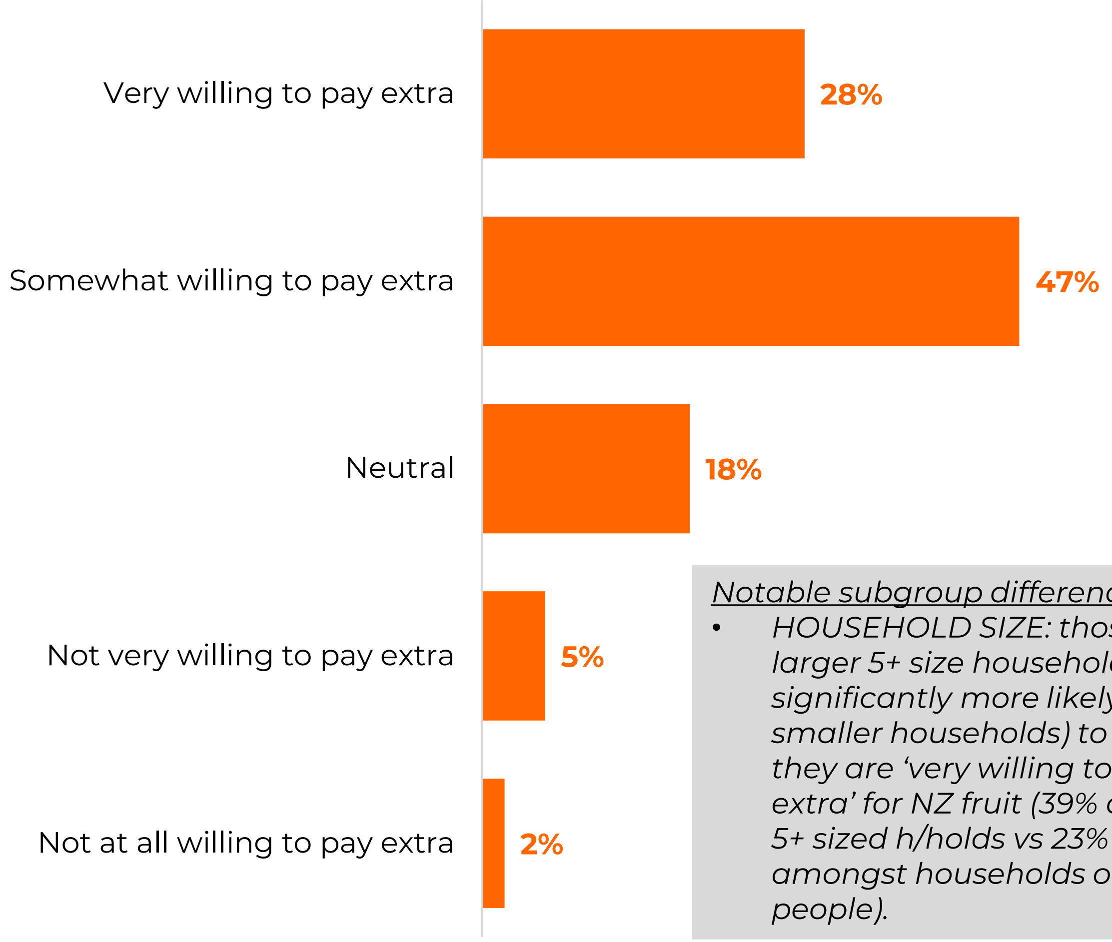
NZ FRUIT SUCCES FACTORS (C1xD9): Key opportunities to strengthen NZ associations are on 'price' and texture'.



QC1: How important are each of the following factors for you personally when choosing which fruit to buy (TOP-2)? * QD9: We would like to know for each statement to what extent you believe it applies to fruit from New Zealand (TOP-2)?
Total N: 309

EXPECTED PREMIUM FOR NZ FRUIT (D10/D11): Majority are willing to pay extra for New Zealand fruit, but most of these expect only a small premium (up to 10%).

WILLINGNESS TO PAY EXTRA FOR NZ FRUIT (D10)



<u>Notable subgroup differences</u>:

- *HOUSEHOLD SIZE: those in larger 5+ size households are significantly more likely (vs smaller households) to say that they are 'very willing to pay extra' for NZ fruit (39% amongst 5+ sized h/holds vs 23% amongst households of 1-4 people).*

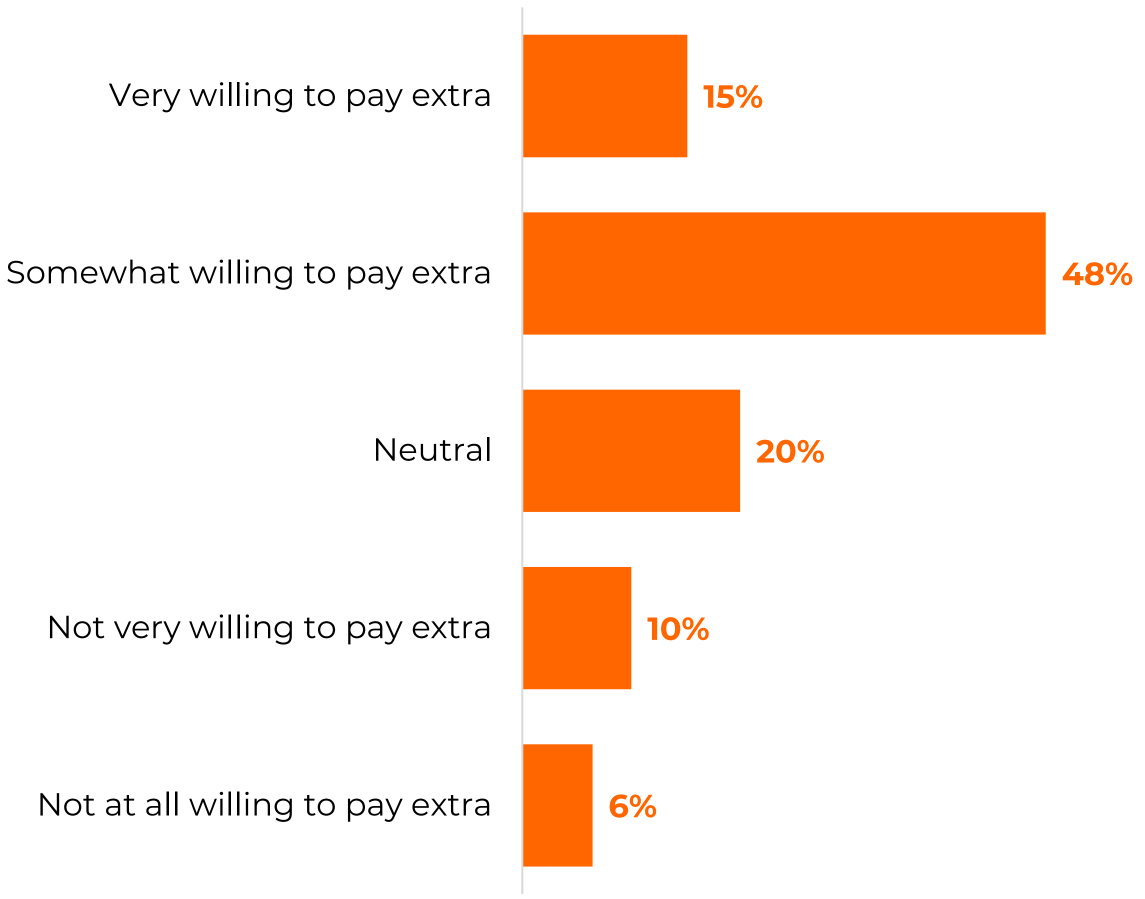
EXPECTED PREMIUM FOR NZ FRUIT (D11)

QD10: To what, if any, extent are you willing to pay a bit extra for fruit grown in New Zealand?
Total N: 311

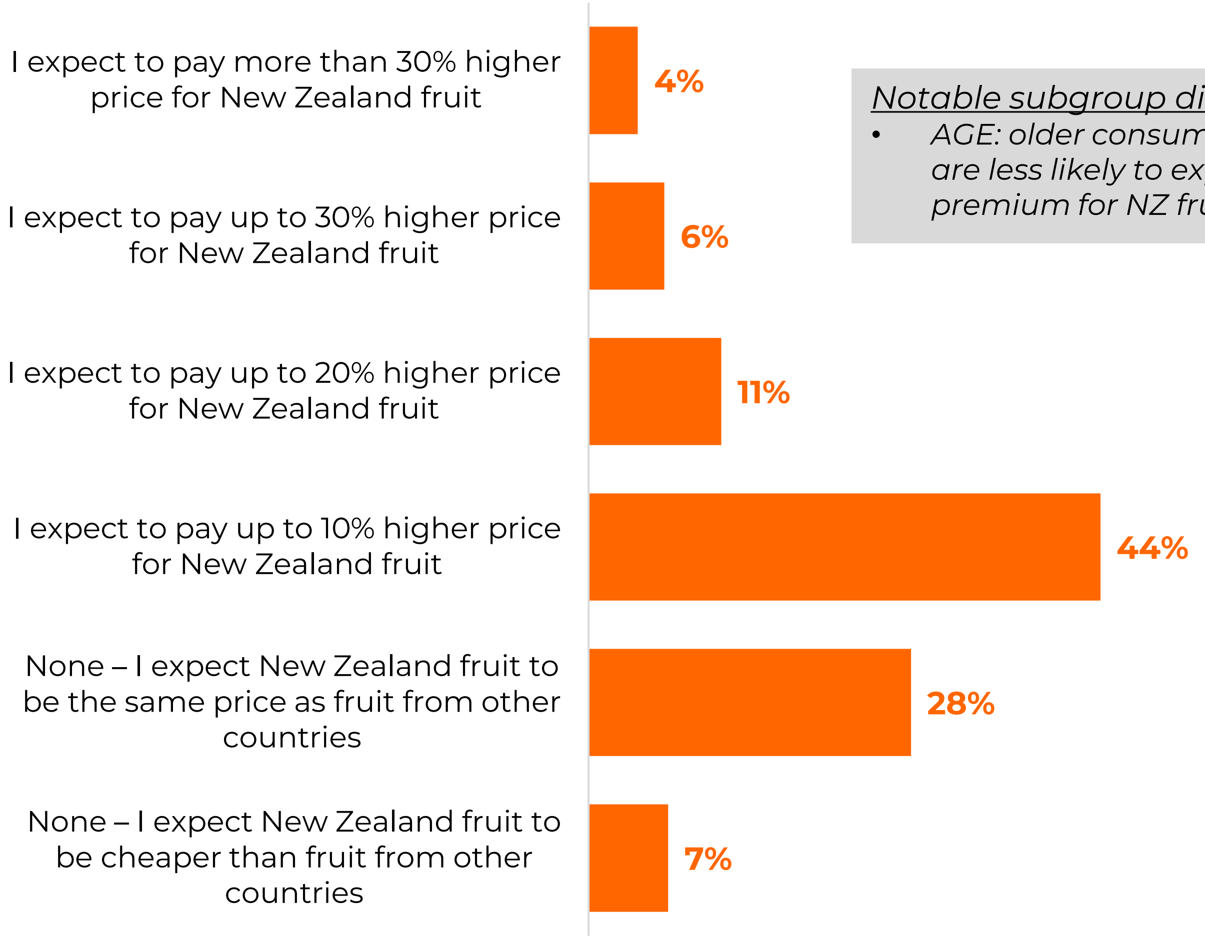
QD11: What, if any, degree of extra price do you expect to pay for fruit grown in New Zealand?
Total N: 311

EXPECTED PREMIUM FOR NZ FRUIT (D10/D11): Majority are willing to pay extra for New Zealand fruit, but most of these expect only a modest premium (up to 10%).

WILLINGNESS TO PAY EXTRA FOR NZ FRUIT (D10)



EXPECTED PREMIUM FOR NZ FRUIT (D11)



Notable subgroup differences:

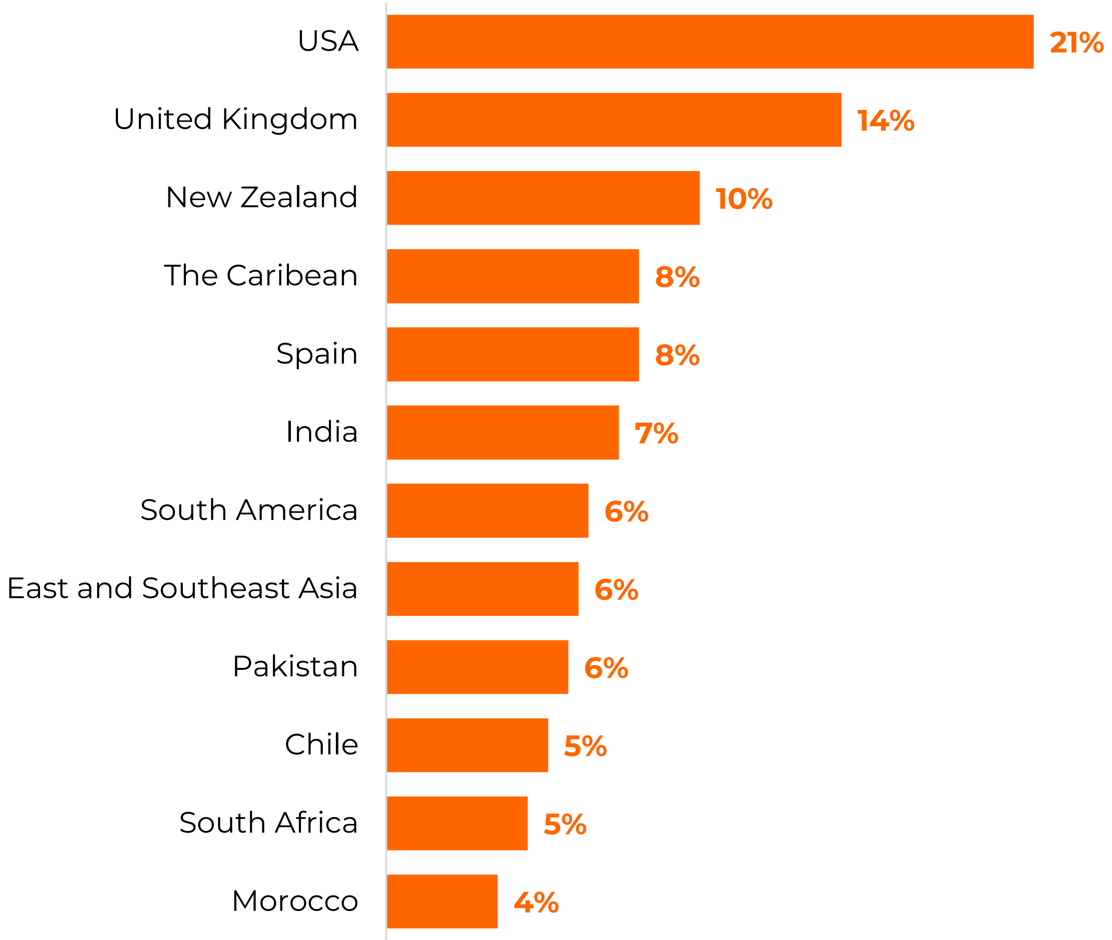
- *AGE: older consumers aged 45+ are less likely to expect to pay a premium for NZ fruit.*

QD10: To what, if any, extent are you willing to pay a bit extra for fruit grown in New Zealand?
Total N: 309

QD11: What, if any, degree of extra price do you expect to pay for fruit grown in New Zealand?
Total N: 309

EXPECTED PRICE OF FRUIT BY COUNTRY(D12): UK and USA dominate consumer perceptions of high-priced sources of fruit. 10% associate NZ fruit as ‘the most expensive’ – but overall NZ fruit sits mid-table on average price ranking.

EXPECTED “MOST EXPENSIVE” COUNTRY (D12)



AVERAGE PRICE RANKING BY COUNTRY

Most expensive

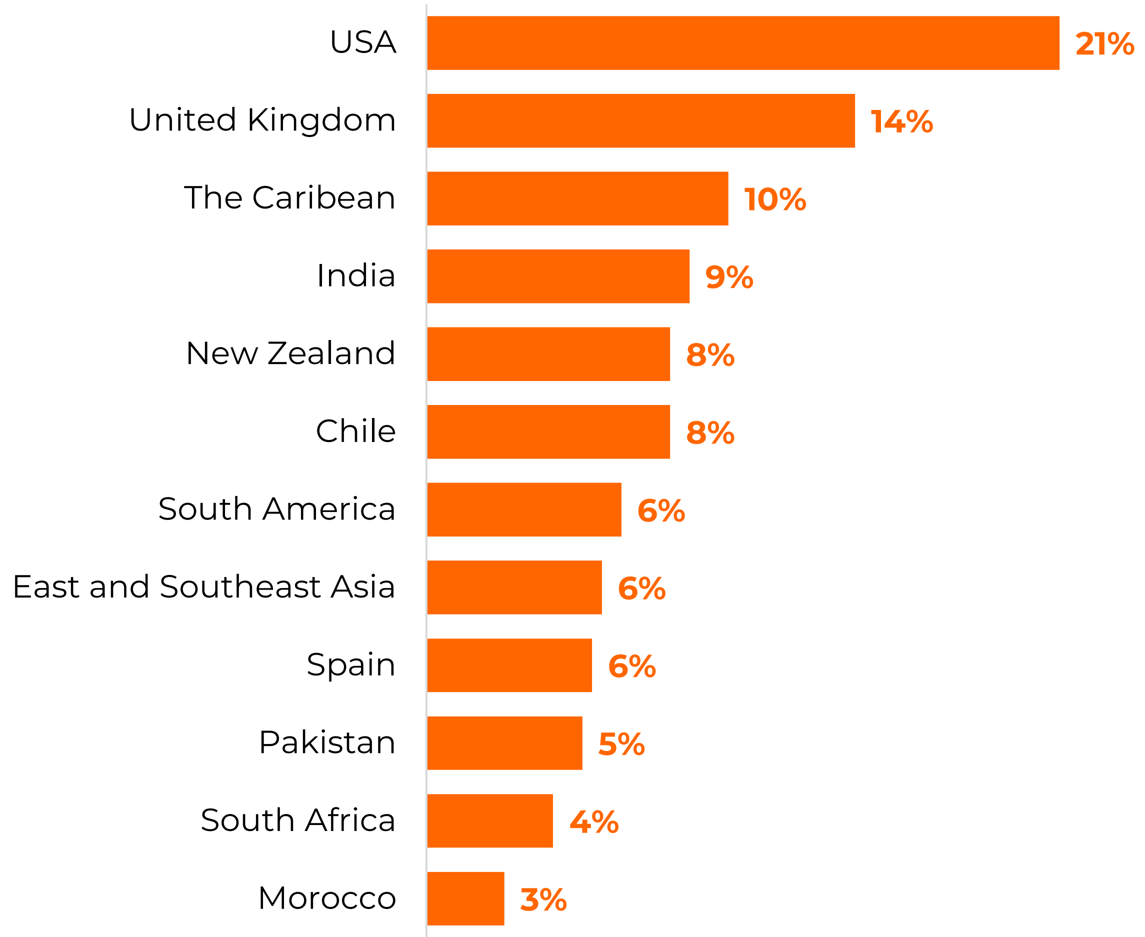
United Kingdom
USA
South America
The Caribean
Spain
New Zealand
Chile
South Africa
East and Southeast Asia
Morocco
India
Pakistan

Least expensive

QD12: So, from which country or region would you expect their fruit to be priced the lowest (cheapest) out of all these? So to recap: 1 = cheapest; 12 = most expensive
Total N: 311

EXPECTED PRICE OF FRUIT BY COUNTRY(D12): USA and UK are seen as the most expensive sources of fruit. NZ sits more mid-table in terms of price associations.

EXPECTED "MOST EXPENSIVE" COUNTRY (D12)



AVERAGE PRICE RANKING BY COUNTRY

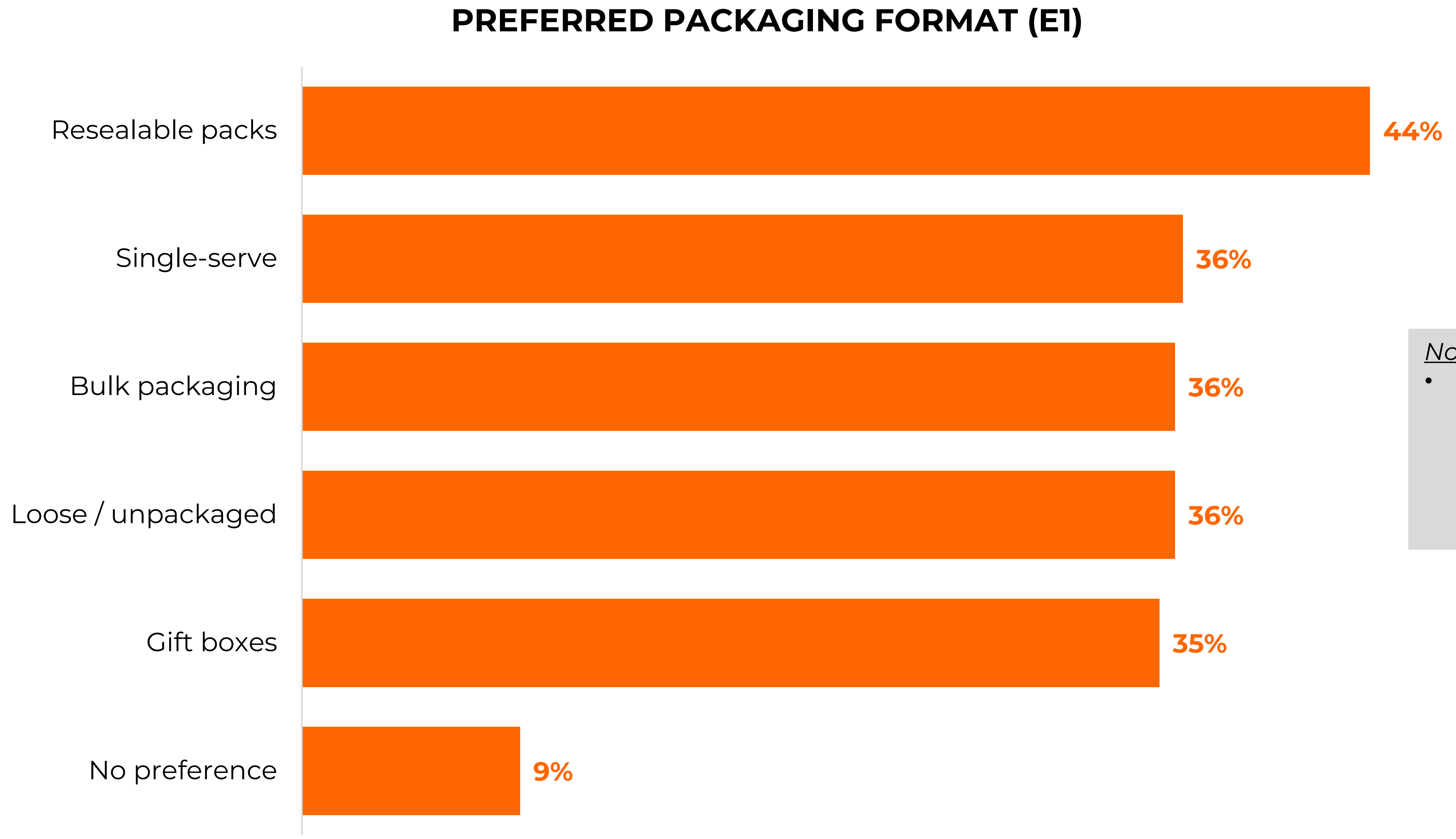
Most expensive

United Kingdom
USA
The Caribean
South America
Spain
New Zealand
Chile
South Africa
East and Southeast Asia
Morocco
India
Pakistan

Least expensive

QD12: So, from which country or region would you expect their fruit to be priced the lowest (cheapest) out of all these? So to recap: 1 = cheapest; 12 = most expensive
Total N: 309

PREFERRED PACKAGING FORMAT (E1): Resealable packs slightly preferred by UAE consumers, but single-serve, bulk, and gift boxes also appeal.



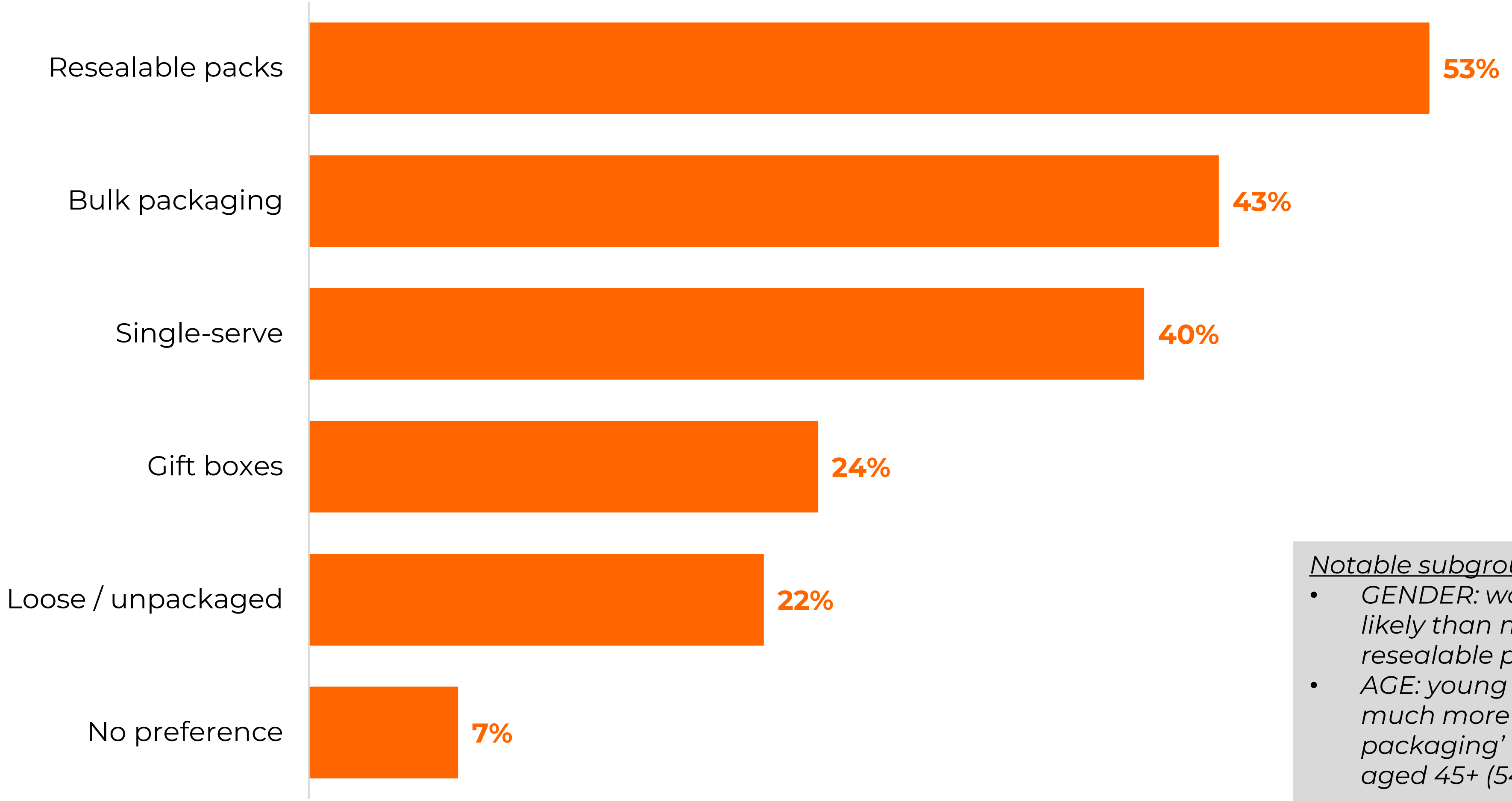
Notable subgroup differences:

- *HOUSEHOLD SIZE: 'resealable' packs are especially popular with those in larger 5+ sized households (55% vs 44% amongst total sample).*

QE1: Which packaging formats do you prefer when buying fruit?
Total N: 311

PREFERRED PACKAGING FORMAT (E1): KSA consumers prefer resealable, bulk, and single-serve packaging for fruit.

PREFERRED PACKAGING FORMAT (E1)



Notable subgroup differences:

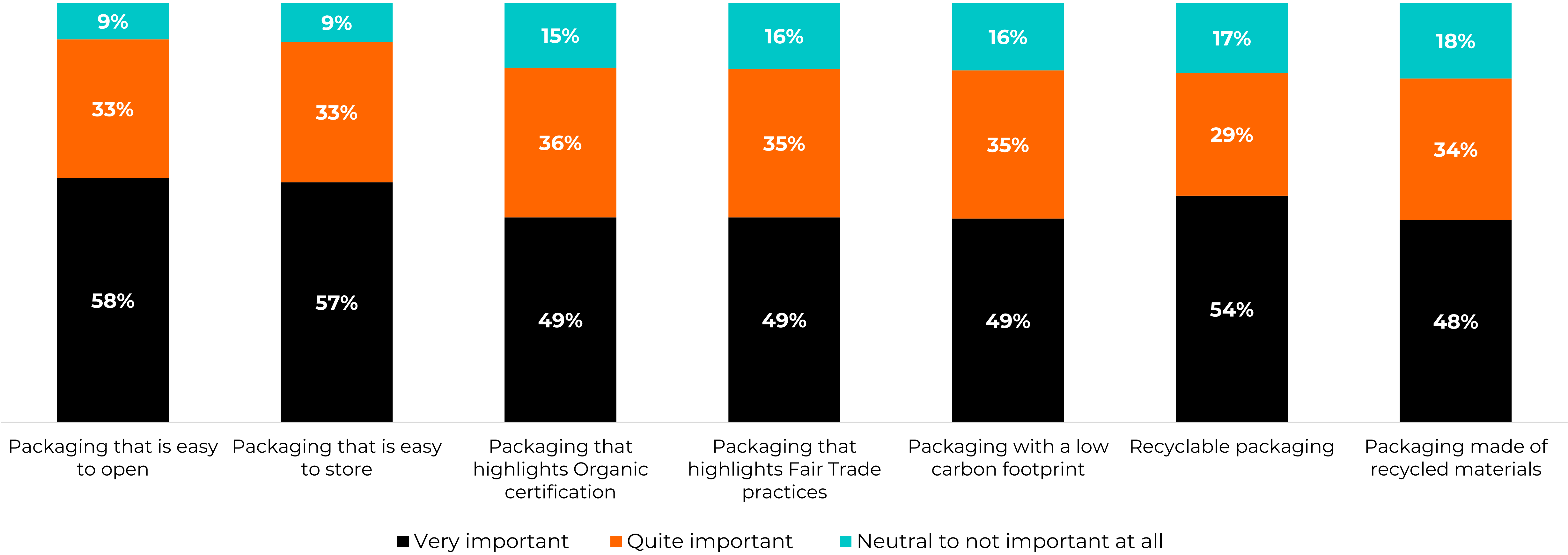
- *GENDER: women are significantly more likely than men (64% vs 47%) to prefer resealable packs*
- *AGE: young consumers aged 21-30 are much more likely to prefer 'bulk packaging' versus older consumers aged 45+ (54% vs 21% respectively)*

QE1: Which packaging formats do you prefer when buying fruit?
Total N: 309

PACKAGING PRIORITIES (E2): Easy-to-open and easy-to-store are top stated packaging priorities, followed by packaging highlighting organic certifications and/or fair trade.

IMPORTANCE RATING (E2)

Notable subgroup differences:
- *AGE: packaging that highlights Organic certifications is significantly LESS IMPORTANT for the older consumers aged 45+.*

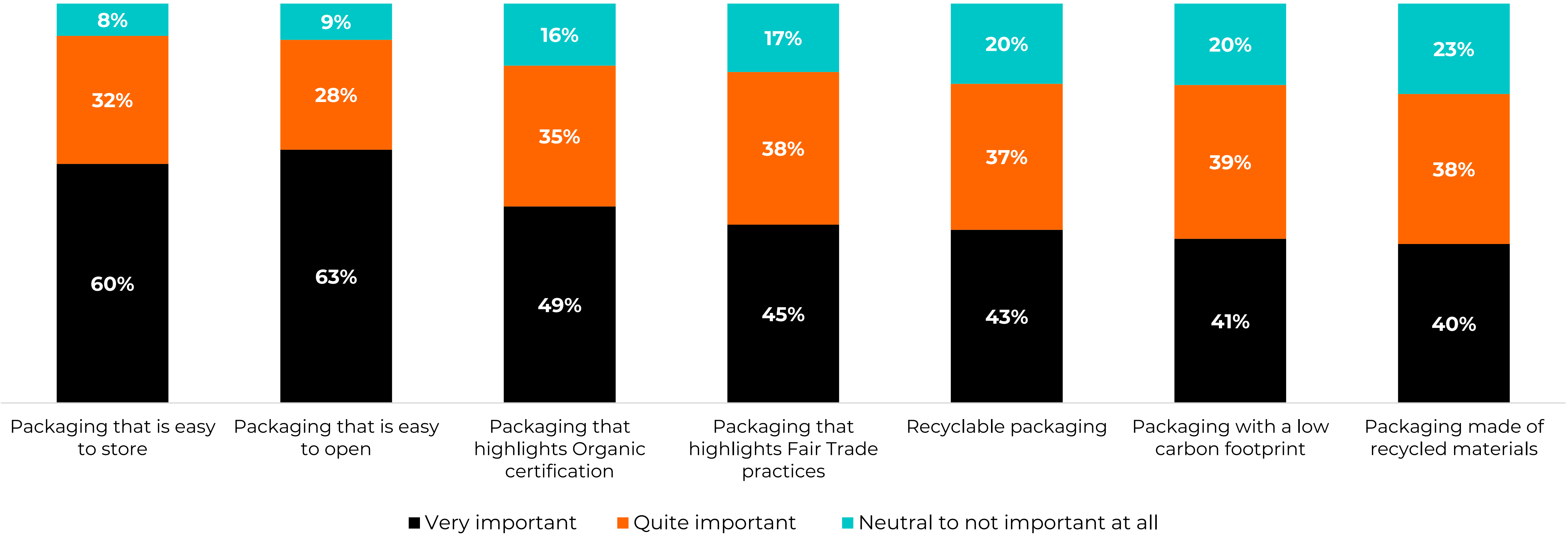


QE2: How important are the following when buying fruit?
Total N: 311

PACKAGING PRIORITIES (E2): Easy-to-store & easy-to-open are top stated packaging priorities, followed by packaging highlighting organic certifications and/or fair trade.

<u>Notable subgroup differences</u>:
- *INCOME: 'recycled packaging' and/or 'packaging with a low carbon footprint' are significantly more important for those with high incomes vs those with low incomes.*

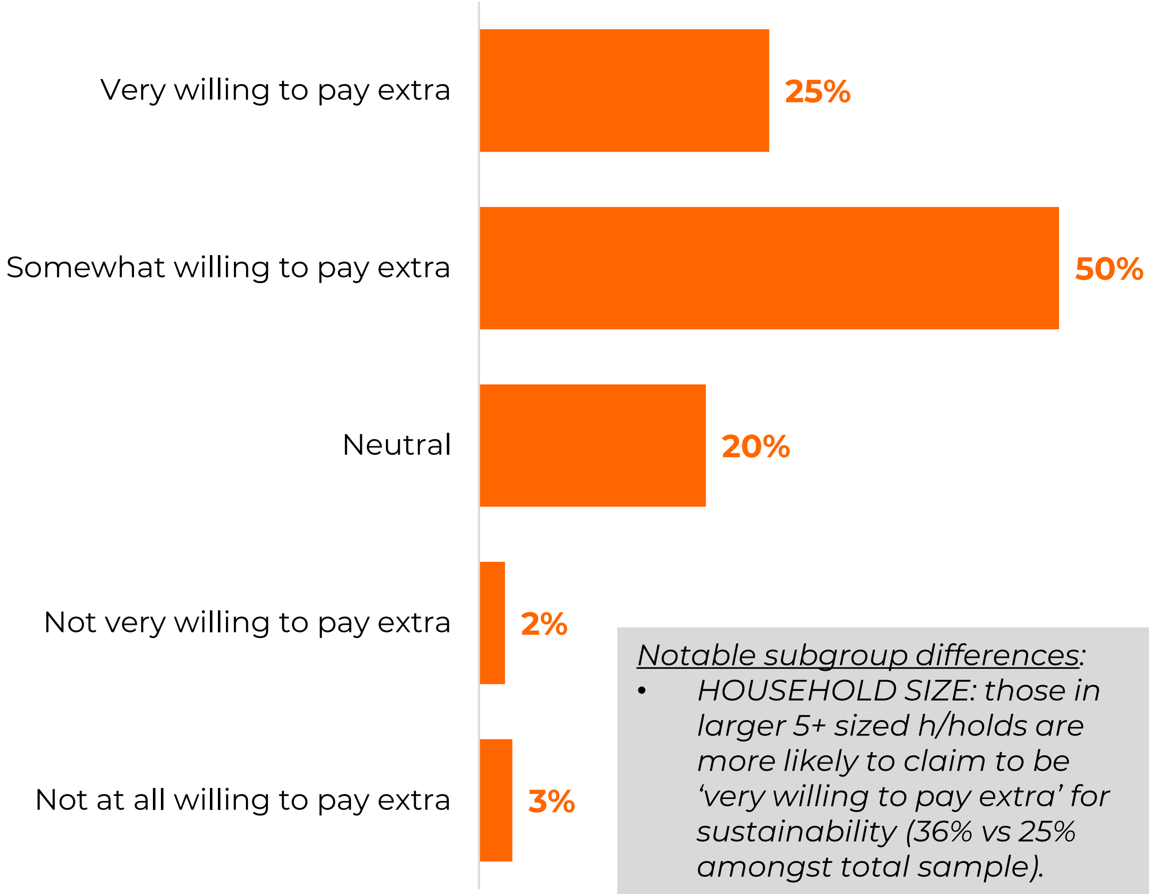
IMPORTANCE RATING (E2)



QE2: How important are the following when buying fruit?
Total N: 309

EXPECTED PREMIUM FOR SUSTAINABILITY (E3/E4): Three-quarters claim they are willing to pay some extra for their fruit to be sustainable. However, most expect this premium to be a maximum of +10%.

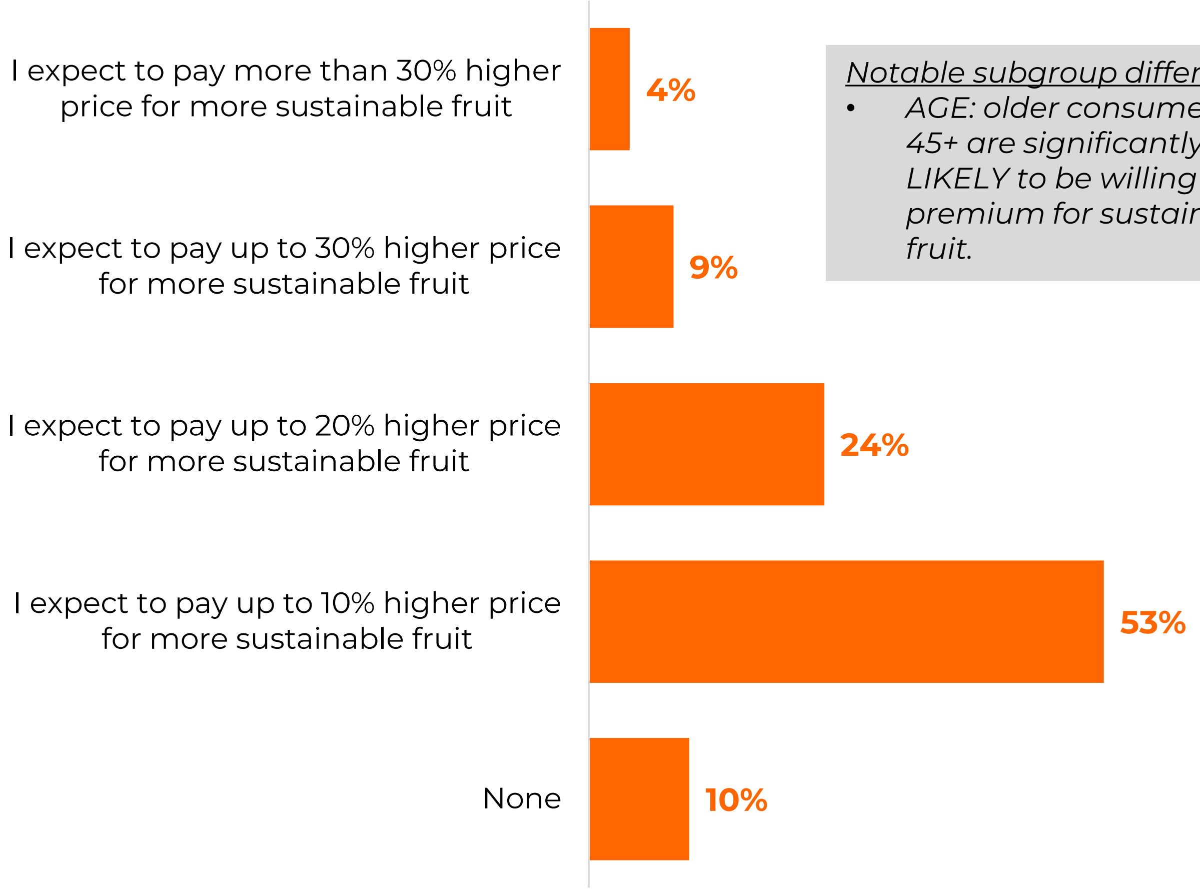
WILLINGNESS TO PAY EXTRA FOR SUSTAINABILITY (E3)



<u>*Notable subgroup differences*</u>*:*

- *HOUSEHOLD SIZE: those in larger 5+ sized h/holds are more likely to claim to be 'very willing to pay extra' for sustainability (36% vs 25% amongst total sample).*

EXPECTED PREMIUM FOR SUSTAINABILITY (E4)



<u>*Notable subgroup differences*</u>*:*

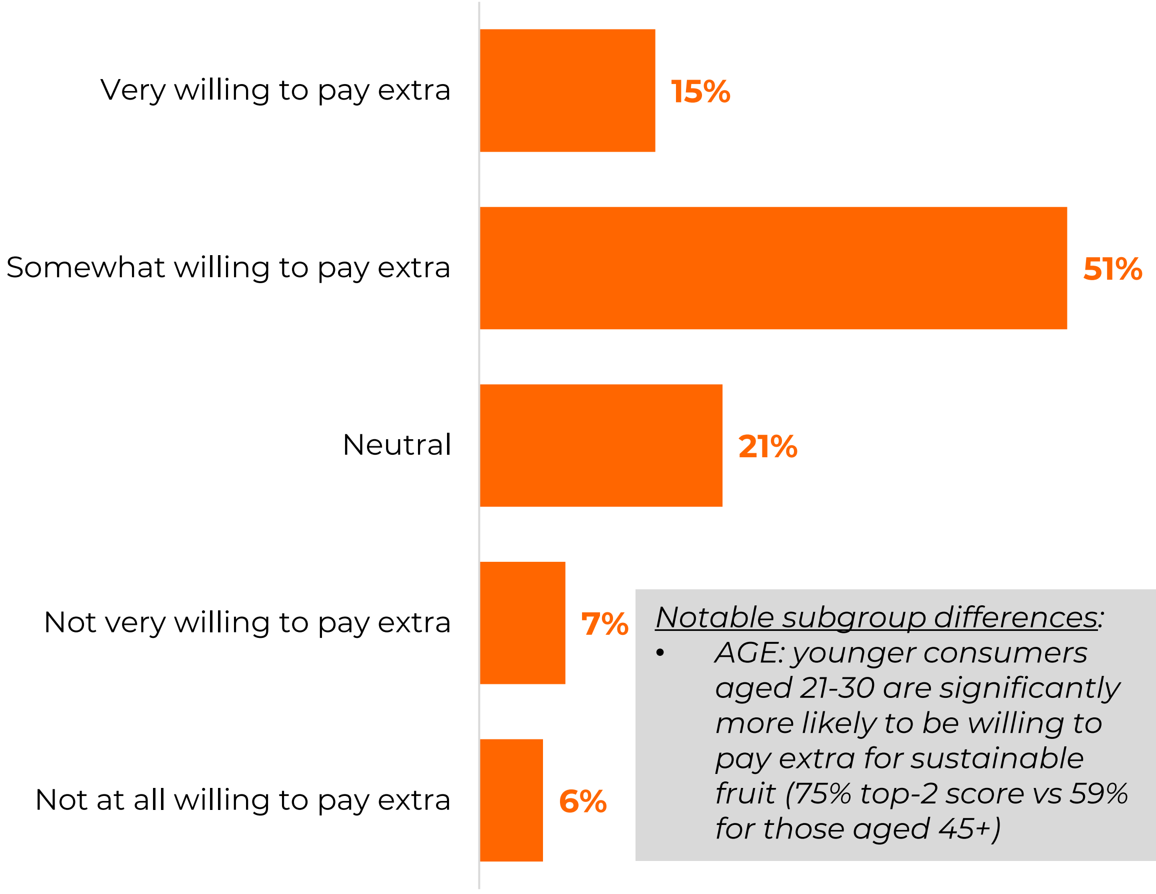
- *AGE: older consumers aged 45+ are significantly LESS LIKELY to be willing to pay a premium for sustainable fruit.*

QE3: To what, if any, extent are you willing to pay a bit extra for fruit grown in a more sustainable manner – i.e. using more sustainable growing practices?
Total N: 311

QE4: What, if any, degree of extra price do you expect to pay for fruit grown in a more sustainable manner?
Total N: 311

EXPECTED PREMIUM FOR SUSTAINABILITY (E3/E4): 7 in 10 are willing to pay extra for sustainable fruit, but most of these expect a premium of a maximum of +10%.

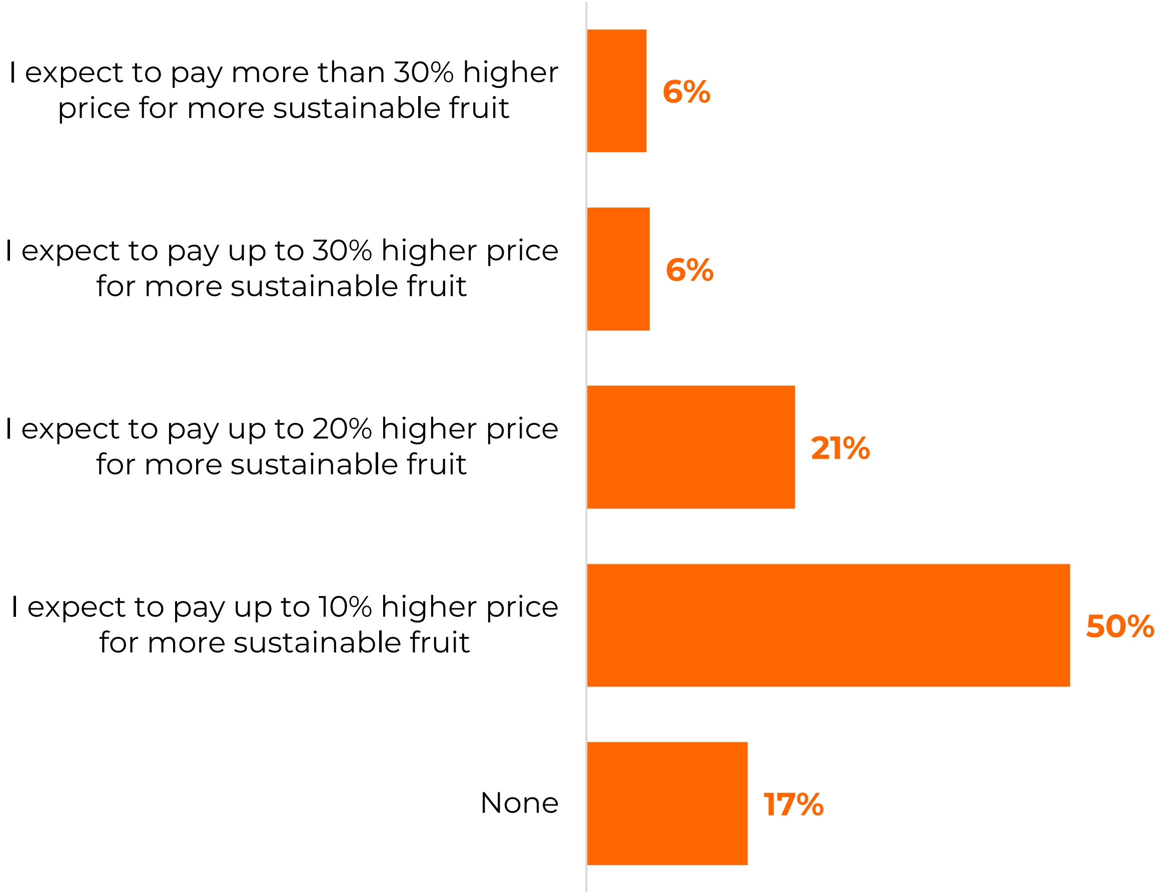
WILLINGNESS TO PAY EXTRA FOR SUSTAINABILITY (E3)



Notable subgroup differences:

- *AGE: younger consumers aged 21-30 are significantly more likely to be willing to pay extra for sustainable fruit (75% top-2 score vs 59% for those aged 45+)*

EXPECTED PREMIUM FOR SUSTAINABILITY (E4)

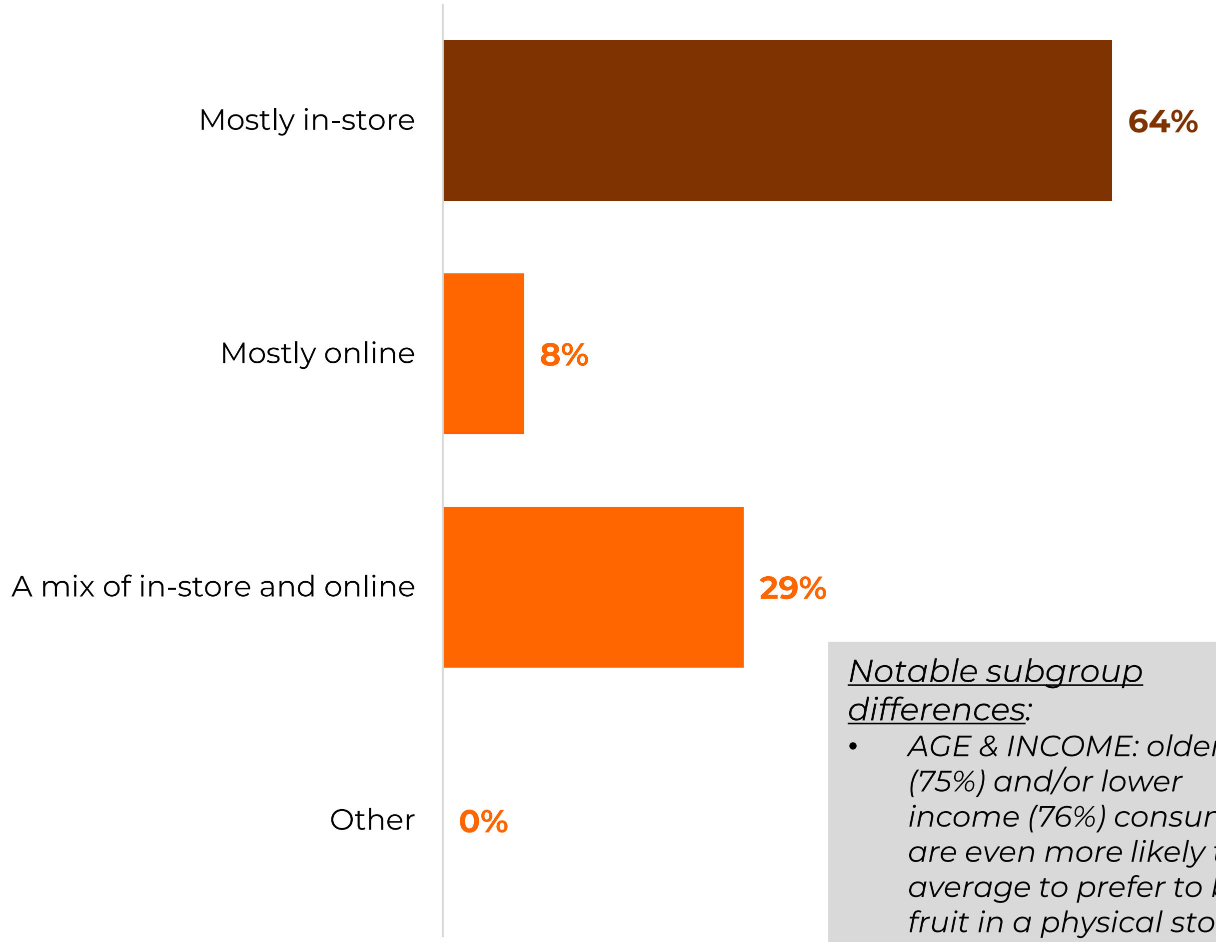


QE3: To what, if any, extent are you willing to pay a bit extra for fruit grown in a more sustainable manner – i.e. using more sustainable growing practices?
Total N: 309

QE4: What, if any, degree of extra price do you expect to pay for fruit grown in a more sustainable manner?
Total N: 309

INSTORE VS ONLINE FRUIT PURCHASING (E5/E6): In-Store remains the preferred channel. Amazon Fresh and Talabat Mart lead among online sites.

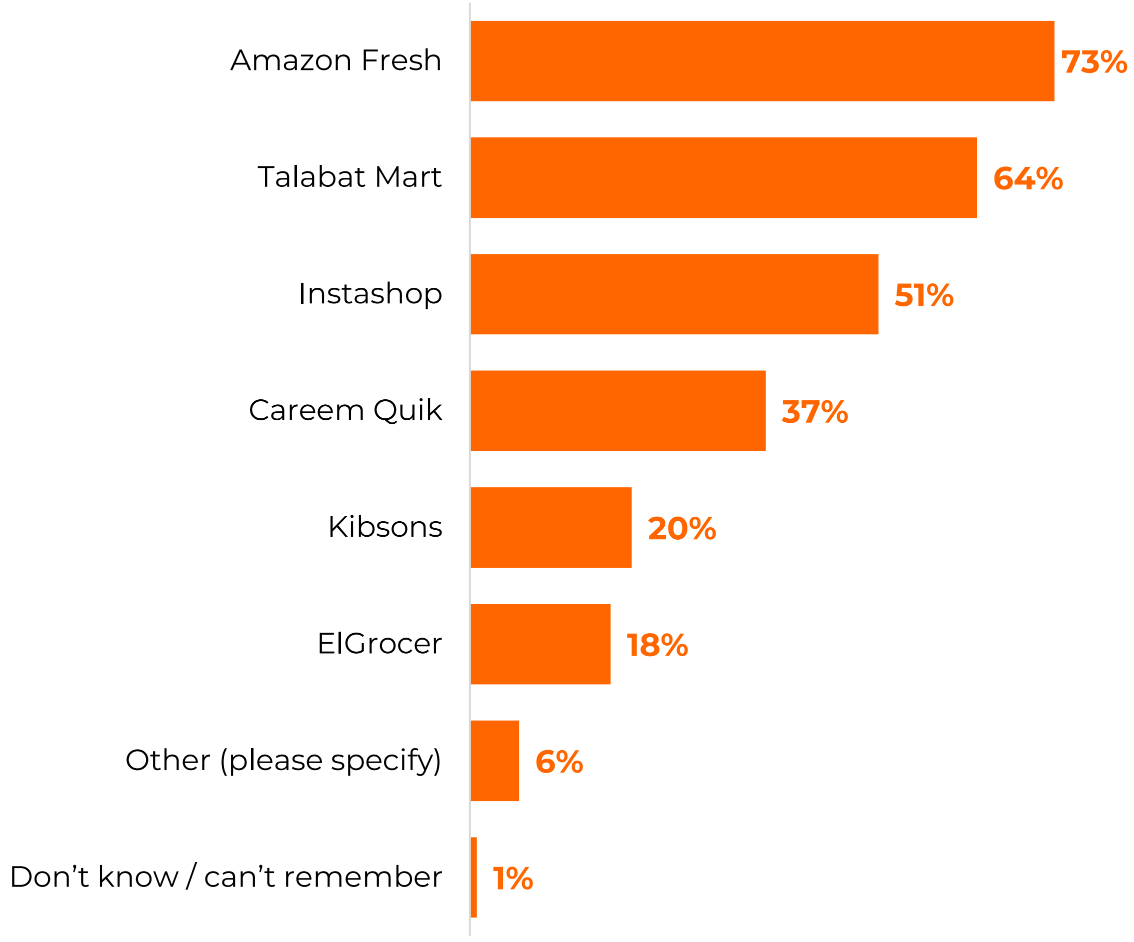
PREFERRED FRUIT CHANNEL (E5)



<u>Notable subgroup differences</u>:

- *AGE & INCOME: older (75%) and/or lower income (76%) consumers are even more likely than average to prefer to buy fruit in a physical store.*

ONLINE FRUIT SITES USED (E6)

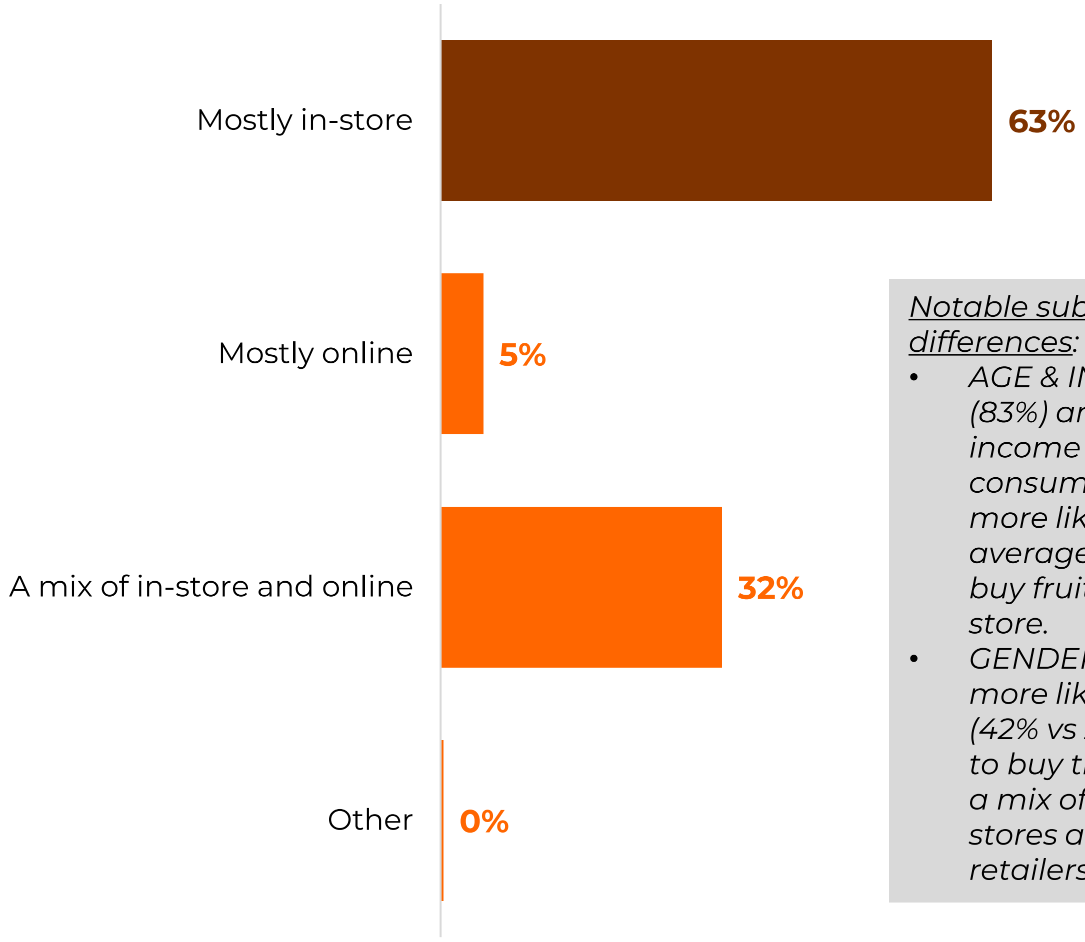


QE5: How do you prefer to buy your fruit?
Total N: 311

QE6: Can we check, which if any of the following online services have you used to buy fruit online?
Total N: 113

INSTORE VS ONLINE FRUIT PURCHASING (E5/E6): Most still prefer In-Store shopping for fruit. Amongst those who do shop for fruit online Hungerstation, Amazon Fresh and Noon are the most used site.

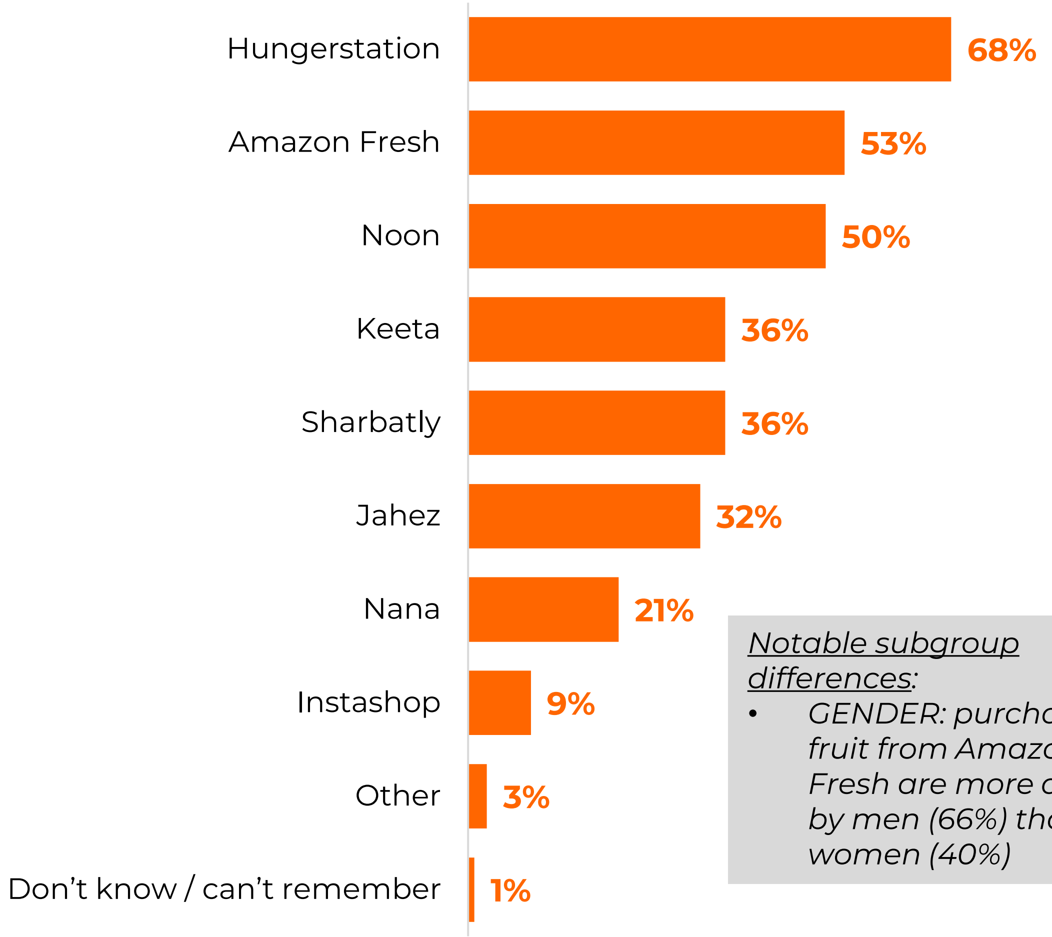
PREFERRED FRUIT CHANNEL (E5)



<u>Notable subgroup differences</u>:

- *AGE & INCOME: older (83%) and/or lower income (81%) consumers are even more likely than average to prefer to buy fruit in a physical store.*
- *GENDER: women are more likely than men (42% vs 26%) to prefer to buy their fruit from a mix of physical stores and online retailers.*

ONLINE FRUIT SITES USED (E6)



<u>Notable subgroup differences</u>:

- *GENDER: purchases of fruit from Amazon Fresh are more driven by men (66%) than by women (40%)*

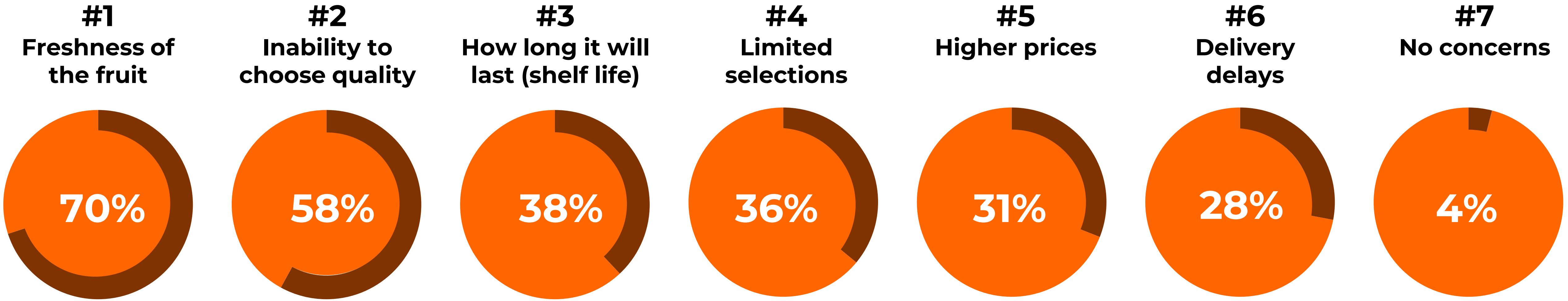
QE5: How do you prefer to buy your fruit?
Total N: 309

QE6: Can we check, which if any of the following online services have you used to buy fruit online?
Total N: 114

ONLINE FRUIT BARRIERS (E7): Freshness and quality control are the key potential barriers when it comes to buying fruit online

ONLINE FRUIT BARRIERS

'Which, if any, concerns do you have about buying fruit online?'



Notable subgroup differences:

- *AGE: older 45+ aged consumers are more likely to state 'inability to choose quality' as a key barrier to buying fruit online (69% vs 58% amongst total sample).*

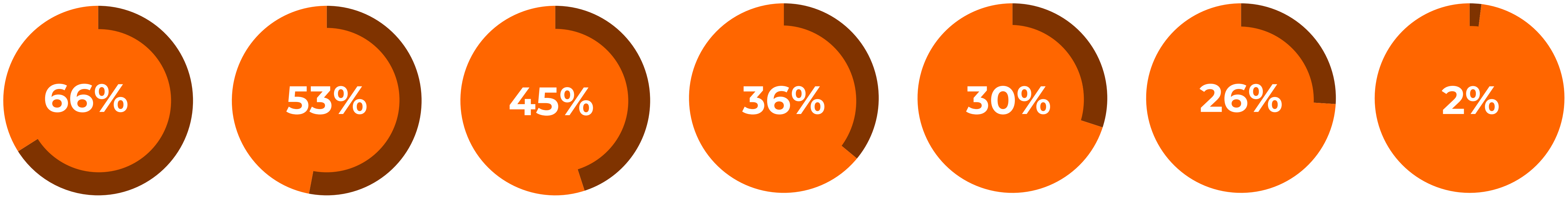
QE7: Which, if any, concerns do you have about buying fruit online?
Total N: 311

ONLINE FRUIT BARRIERS (E7): Freshness, quality control, and shelf life are the key potential barriers to KSA consumers buying fruit online.

ONLINE FRUIT BARRIERS

'Which, if any, concerns do you have about buying fruit online?'

#1	#2	#3	#4	#5	#6	#7
Freshness of the fruit	**Inability to choose quality**	**How long it will last (shelf life)**	**Higher prices**	**Delivery delays**	**Limited selections**	**No concerns**



Notable subgroup differences:

- *GENDER: men are more concerned than women re 'delivery delays' (37% vs 20%), while women are more concerned than men re 'inability to choose quality' (63% vs 47%).*

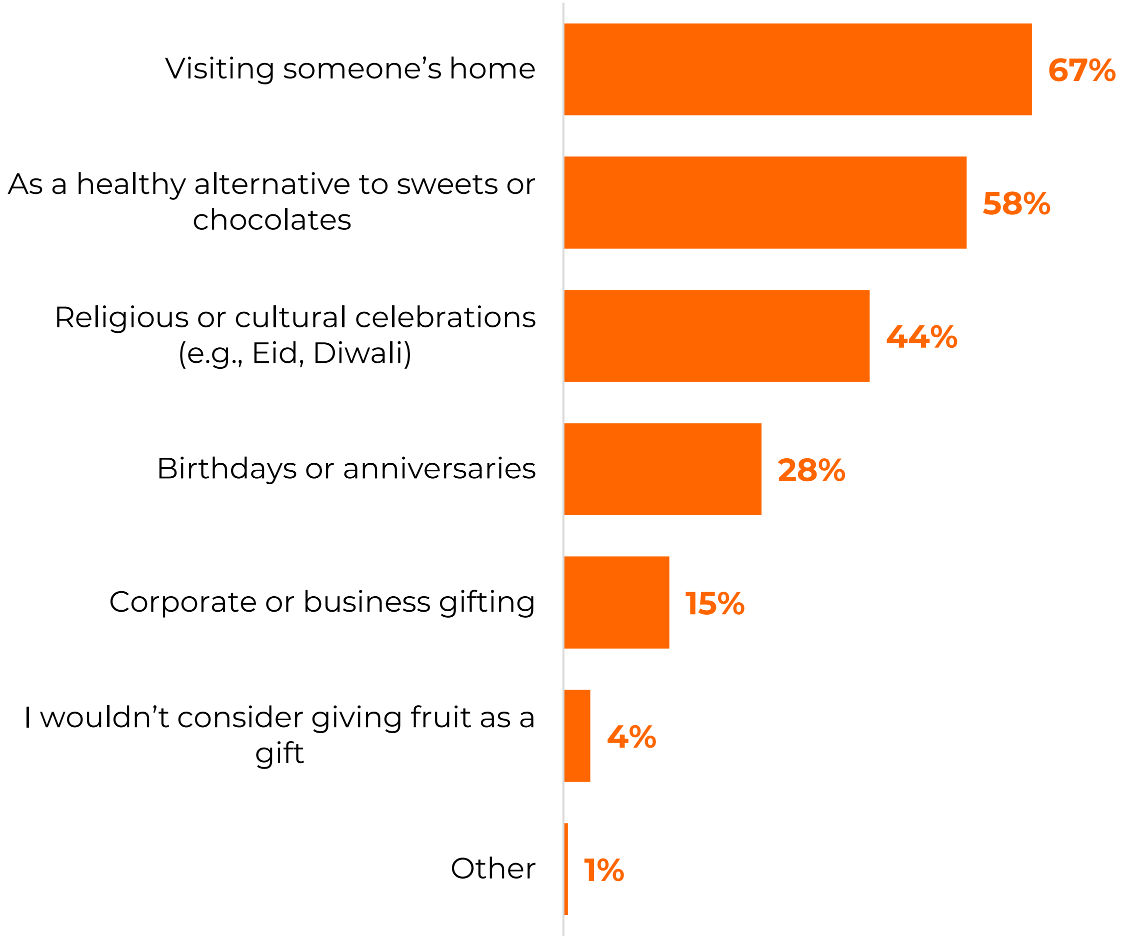
QE7: Which, if any, concerns do you have about buying fruit online?
Total N: 309

FRUIT GIFTING – EXPERIENCE & OCCASIONS (E8/E9): Fruit gifting is widely practiced in UAE and strongly linked to hospitality (i.e. visiting friends), health and celebrations.

FRUIT GIFTING EXPERIENCE (E8)

Notable subgroup differences:
- *AGE: older 45+ aged consumers are LESS LIKLELY to have ever given or received fruit as a gift.*
- *CULTURAL BACKGROUND: Emirati are significantly more likely vs those of other cultural backgrounds to have given fruit as a gift (50% vs 30% amongst total sample)*

FRUIT GIFTING OCCASIONS (E9)

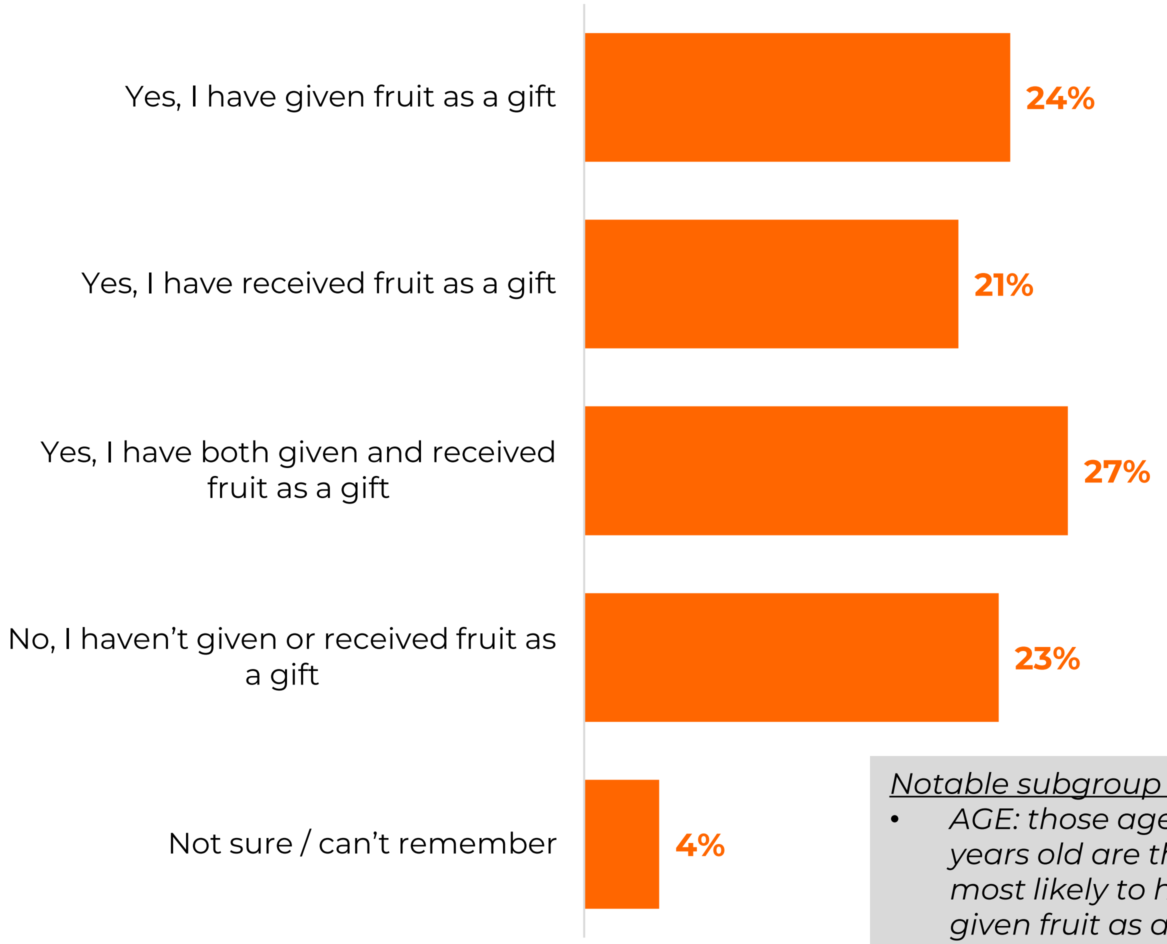


QE8: Have you ever given or received fruit as a gift (e.g. in a gift pack or gift basket)?
Total N: 311

QE9: In which, if any, situations would you consider giving fruit as a gift?
Total N: 311

FRUIT GIFTING – EXPERIENCE & OCCASIONS (E8/E9): Around three-quarters have experienced fruit-gifting, either as the giver or recipient. The most typical occasions are when visiting someone's home, as a healthy alternative, or for celebrations.

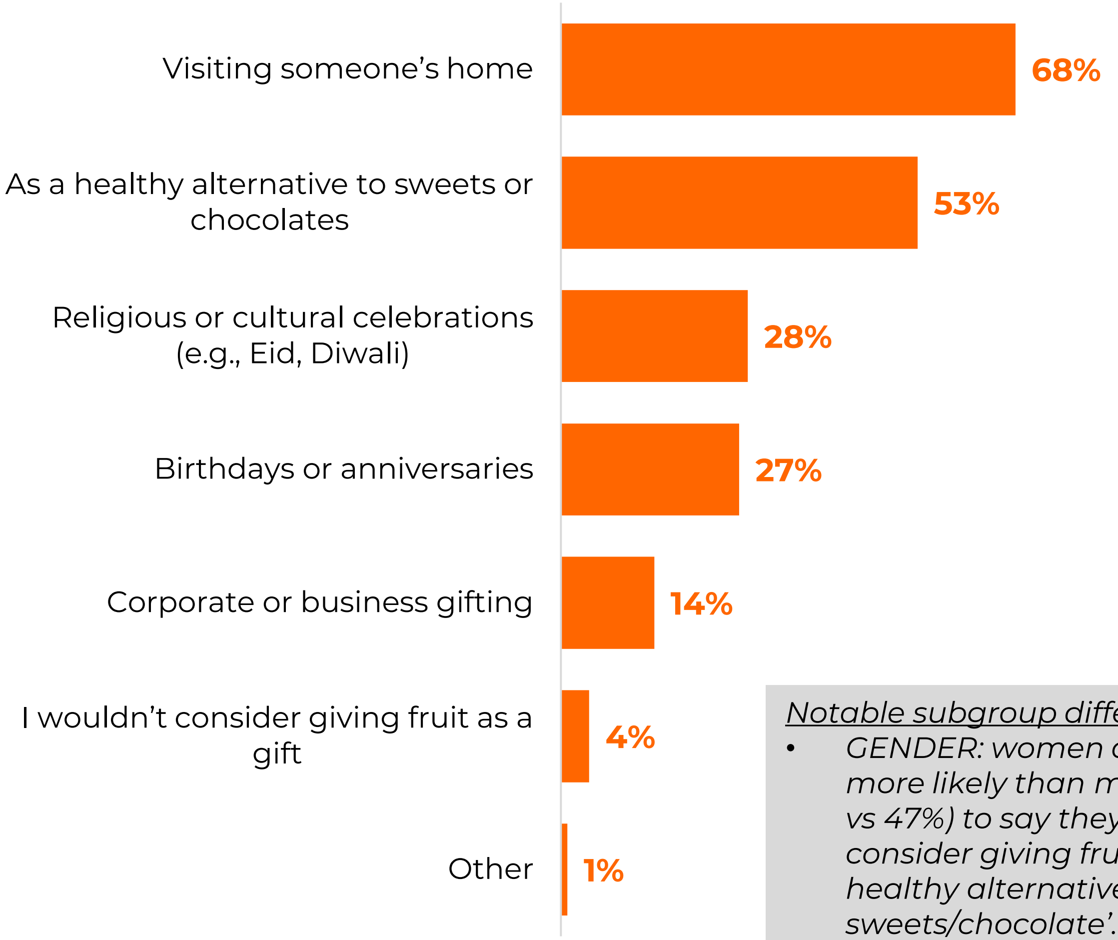
FRUIT GIFTING EXPERIENCE (E8)



Notable subgroup differences:

- *AGE: those aged 31-44 years old are the age group most likely to have ever given fruit as a gift.*

FRUIT GIFTING OCCASIONS (E9)



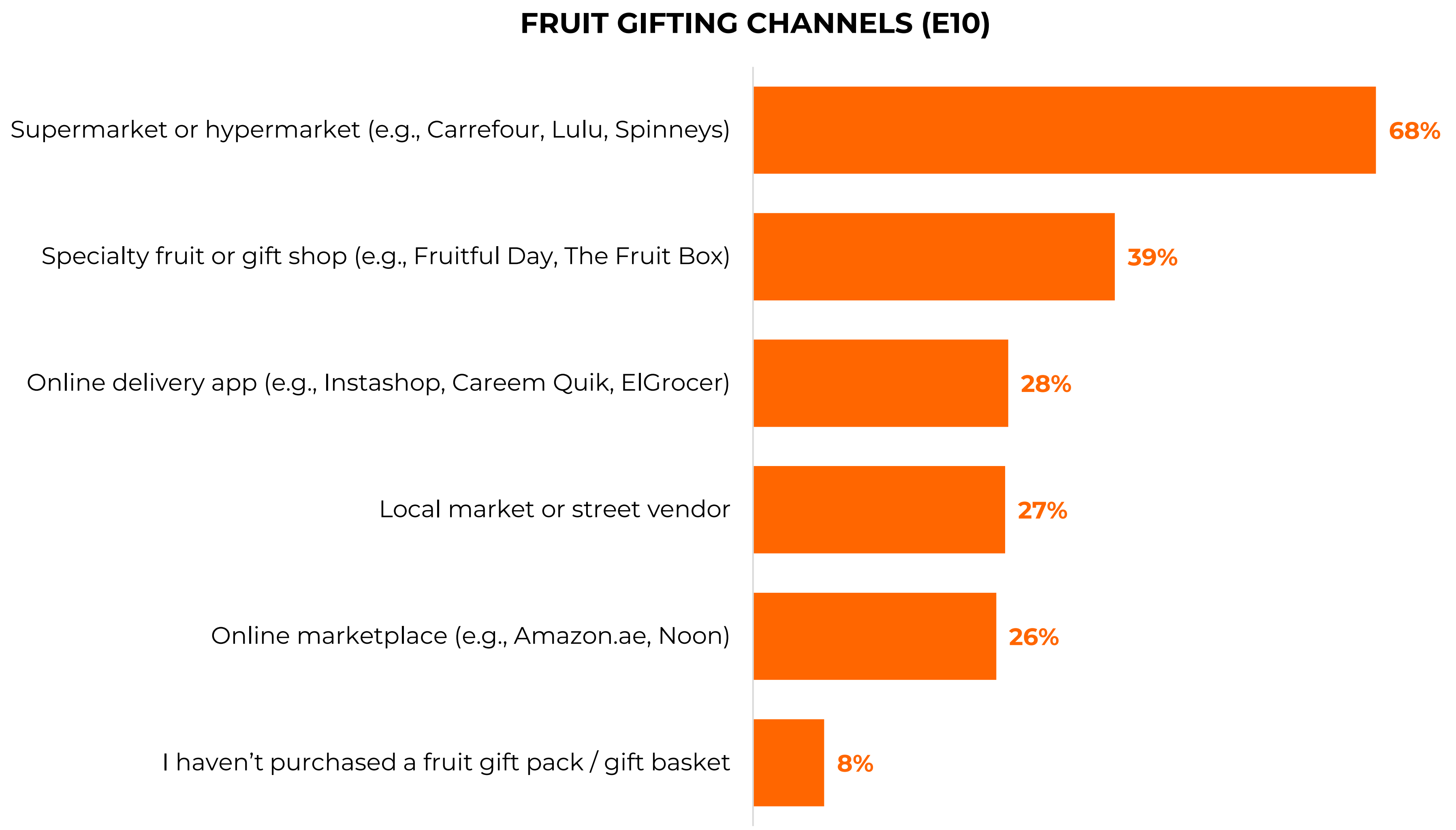
Notable subgroup differences:

- *GENDER: women are more likely than men (62% vs 47%) to say they would consider giving fruit 'as a healthy alternative to sweets/chocolate'.*

QE8: Have you ever given or received fruit as a gift (e.g. in a gift pack or gift basket)?
Total N: 309

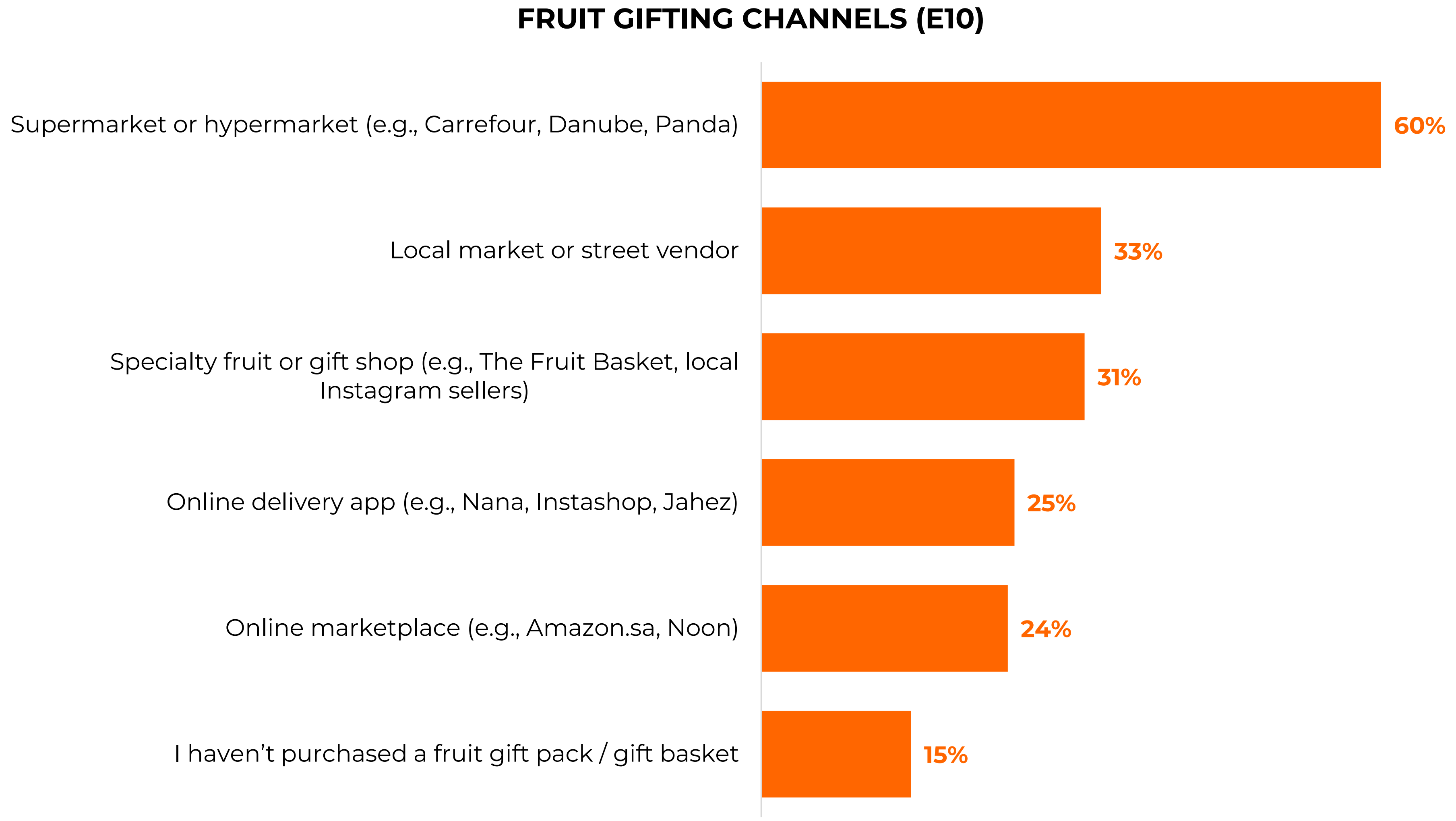
QE9: In which, if any, situations would you consider giving fruit as a gift?
Total N: 309

FRUIT GIFTING CHANNELS (E10): Supermarkets are the top channel (68%) from which to buy fruit gift packs/baskets, followed by speciality fruit or gift shops.



QE10: Have you ever purchased a fruit gift pack or basket from any of the following?
Total N: 311

FRUIT GIFTING CHANNELS (E10): The majority of those who have purchased fruit as a gift bought it from supermarkets, followed by local markets/street vendors, or specialty fruit/gift shops.

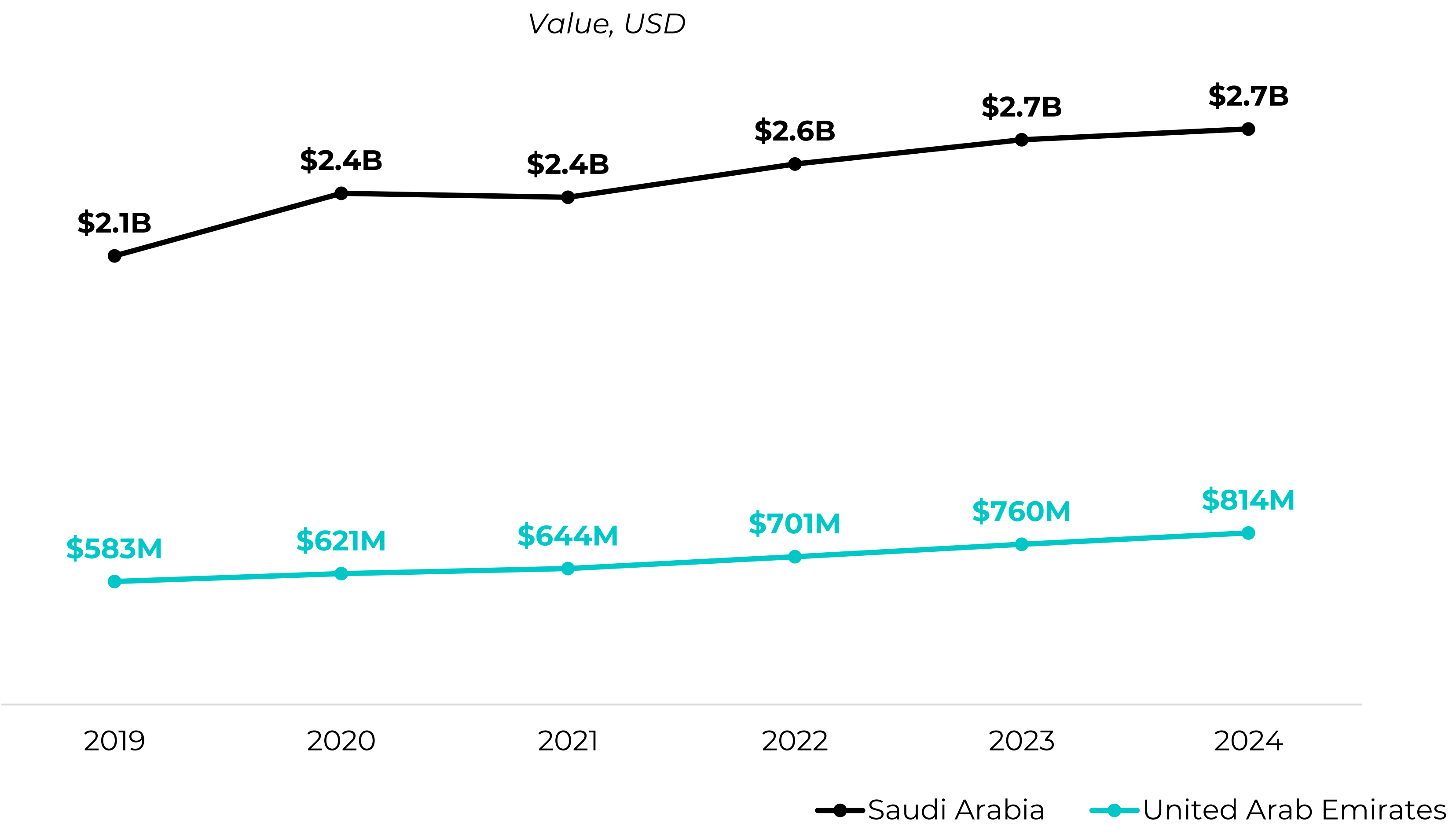


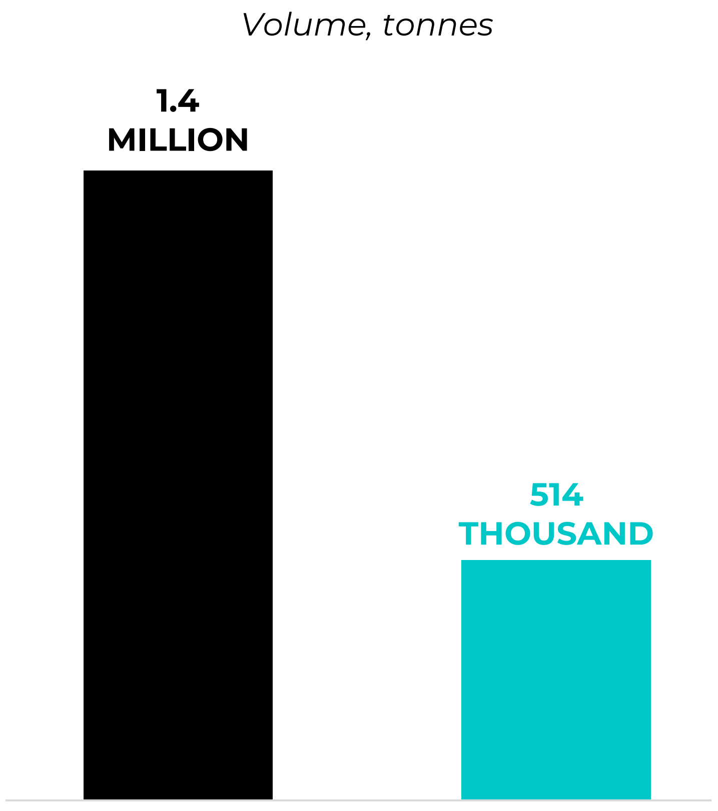
QE10: Have you ever purchased a fruit gift pack or basket from any of the following?
Total N: 309

CONTEXTUAL MARKET DATA

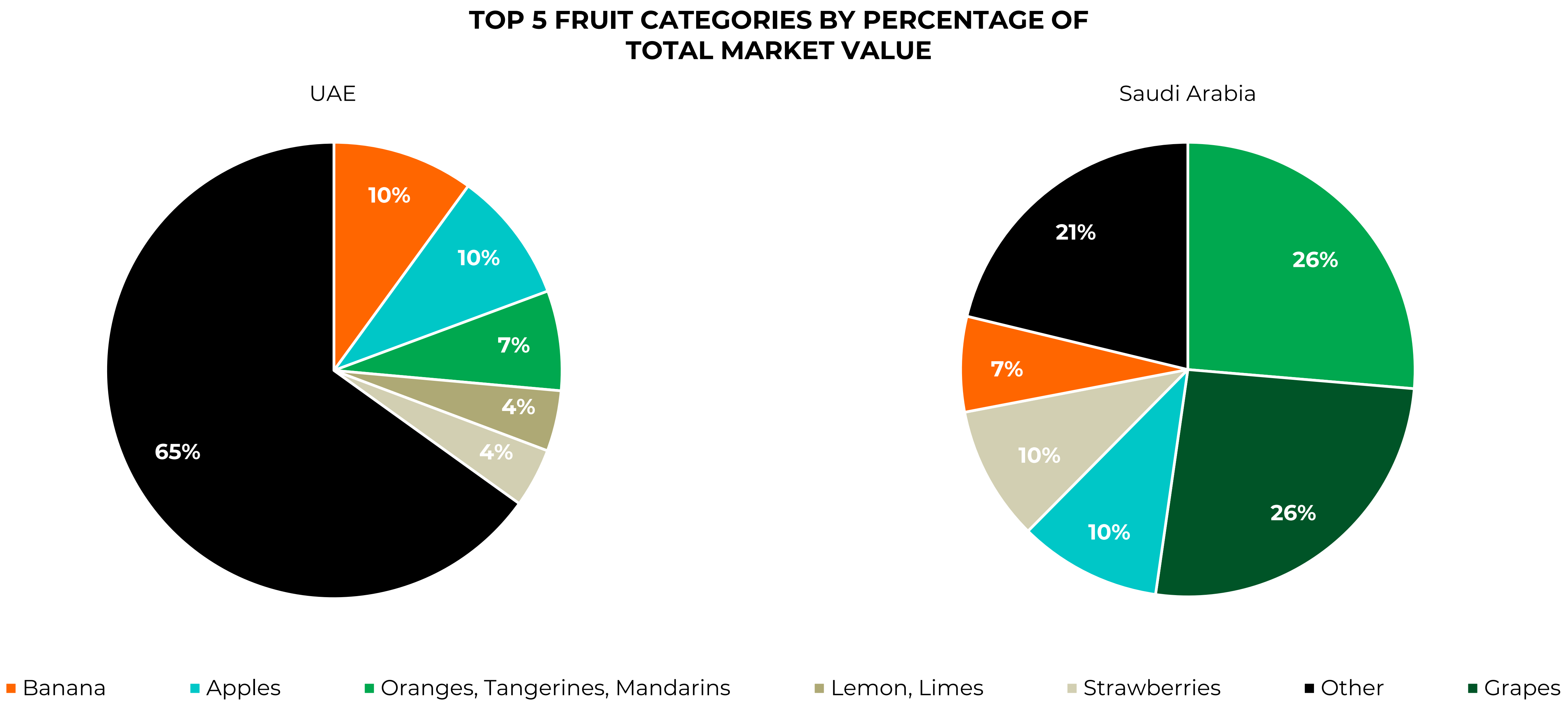
The fruit market in Saudi Arabia and the UAE has shown consistent growth in recent years, with Saudi Arabia leading significantly in market size.

FRUIT MARKET SIZE

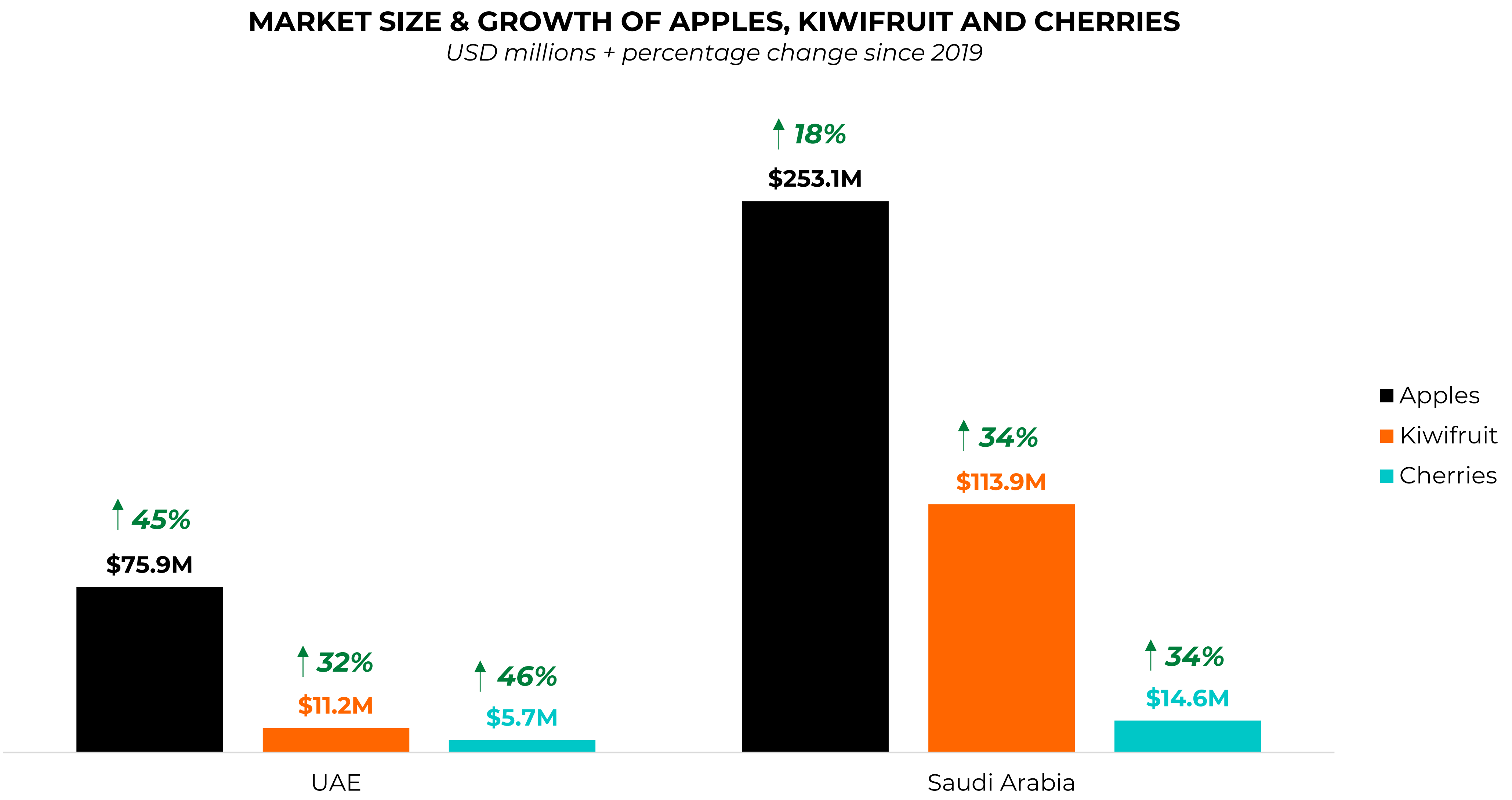




In the UAE, bananas and apples lead in market value, in Saudi Arabia oranges/tangerines/mandarins and grapes lead.

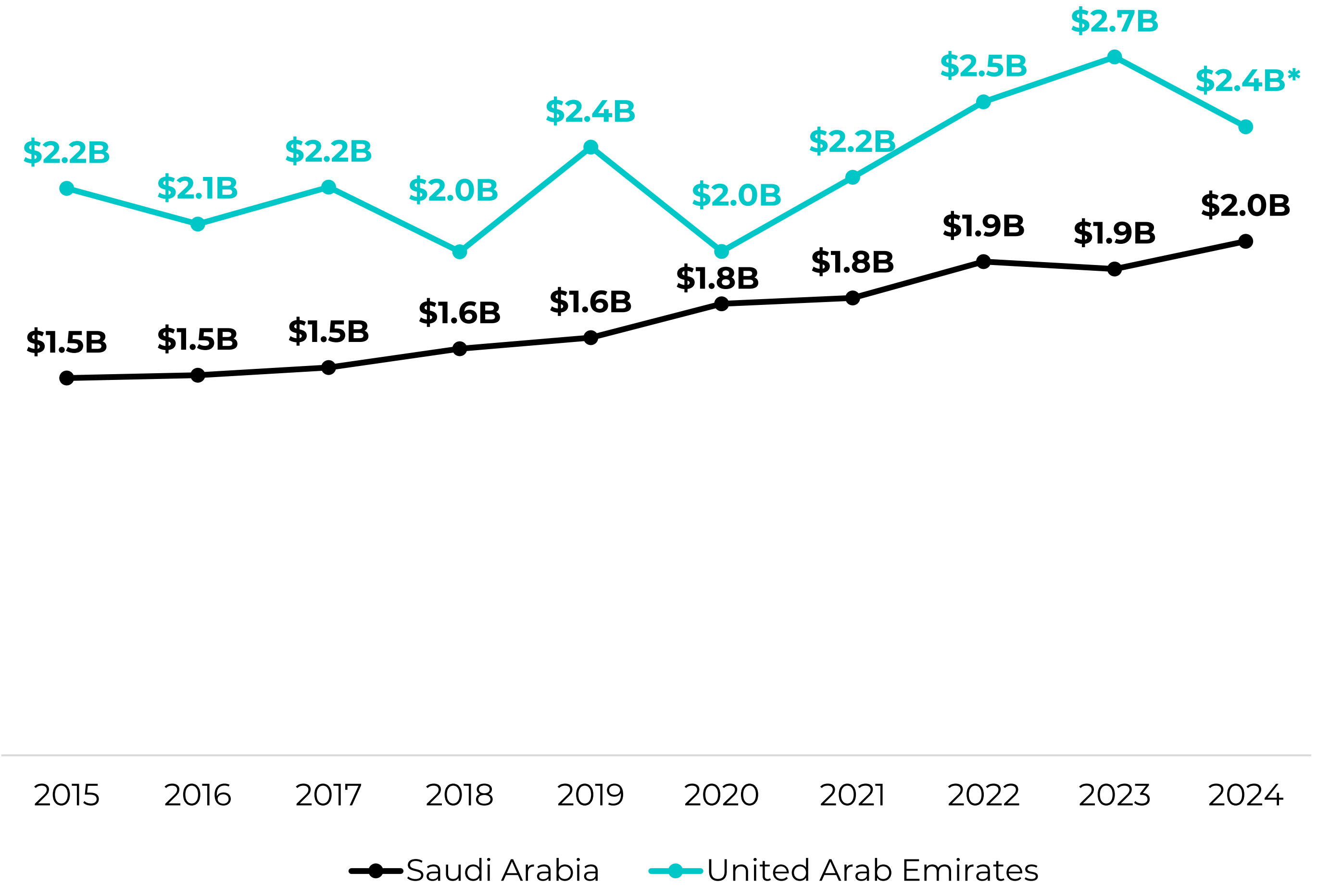


Apples, kiwifruit and cherries have shown significant growth since 2019 in both markets.



New Zealand makes up 1% of fruit & nut imports into the UAE and 0.4% into Saudi Arabia.

FRUIT & NUTS IMPORTS
Value, USD



*Preliminary

TOP FRUIT & NUTS SUPPLYING MARKETS
Value, USD

UAE		Saudi Arabia	
USA	**$549M**	**Egypt**	**$286M**
South Africa	**$350M**	**USA**	**$239M**
India	**$265M**	**Ecuador**	**$232M**
China	**$143M**	**South Africa**	**$230M**
Vietnam	**$139M**	**India**	**$102M**
New Zealand	**$26M**	**New Zealand**	**$8.1M**

Many fruit imports to the UAE are then exported on to other nearby markets.

TOP FRUIT CATEGORY IMPORTS
Value, USD

UAE

Dates
$216M

Apples
$173M

Oranges
$164M

Bananas
$158M

Mangoes, guavas
$106M

Saudi Arabia

Apples
$217M

Oranges
$208M

Lemons & limes
$80M

Grapes
$79M

Tamarinds, jackfruit, lychee
$79M

OTHER FRUIT CATEGORY IMPORTS
Value, USD

UAE

Kiwifruit
$18M

Cherries
$10M

Saudi Arabia

Kiwifruit
$24M

Cherries
$7.4M