Total Vegetables
Comprehensive Review 2024

NIQ Hort Innovation Hort IQ

What is Homescan?

Nielsen IQ Homescan® is a continuous panel of 10,000 households who record all take-home packed and fresh grocery from all retail outlets. The sample is demographically and geographically representative of the Australian household population.

Each household is equipped with a small handheld terminal through which details of all purchasing are entered - product, quantity, price and outlet. This information, along with the date of purchase, is linked with demographic details of the household and the household purchasing history. Data are projected for the population as a whole.

Estimates produced from Nielsen IQ Homescan® are subject to sampling variation which means that every number reported has a standard error associated with it. For example, at a Total National level, a 40% share of trade number, will be subject to a 1% standard error at a 95% confidence interval. This implies there is a 95% chance that the true value of the estimate lies between 39 to 41%.

We have applied enhancements to the Homescan data used to build this report. For more detail please refer to the next slide.

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Funding Statement

This project has been funded by Hort Innovation, using the Australian Horticulture research and development levies, and contributions from the Australian Government. Hort Innovation is the grower-owned, not-for-profit research and development corporation for Australian horticulture.

NIELSENIQ HOMESCAN PANEL ENHANCEMENTS

Census alignment

Adjustments made to reflect the latest Australian household population numbers

Improved item coding

New, streamlined database clean up and maintenance process

Retail channels

Improvements made to better reflect sales and share of 'Other' and 'Non' supermarkets

Benefits:
Improved data quality and retailer representativeness
Greater insights for industry

Enhancements will be reflected from data period 52 we 29/12/2024 and have also been applied across prior years for consistency in comparisons. As a result of these enhancements, you may notice some changes in the data reported for your industry/s. For more information contact us.

Analysis Parameters

Time Periods
12 & 52 weeks to 29/12/2024 versus YA

Data Source
NielsenIQ Homescan™

Markets
AUS, Major Supermarkets (AUS Coles, AUS Woolworths, AUS Aldi) Other Supermarkets, AUS Non-Supermarkets (Greengrocers, Markets and Speciality Stores)

Measures
Value ($), Volume (kg)

Demographic Definitions

LIFESTAGE

SENIOR COUPLES | 2 or more adults 60+
(19% of population)

ESTABLISHED COUPLES | 2 or more adults 35-59
(22% of population)

INDEPENDENT SINGLES | 1 adult >35 with no children
(21% of population)

YOUNG TRANSITIONALS | Adults <35 with no children
(8% of population)

BUSTLING FAMILIES | Oldest Child 12-17
(14% of population)

SMALL SCALE FAMILIES | Oldest Child 6-12
(10% of population)

START UP FAMILIES | Oldest Child <6
(6% of population)

HOUSEHOLD INCOME

LOW HOUSEHOLD INCOME | Household income up to $50K per annum.

MEDIUM HOUSEHOLD INCOME| Household income between $50K & $100K per annum.

HIGH HOUSEHOLD INCOME| Household income over $100K per annum.

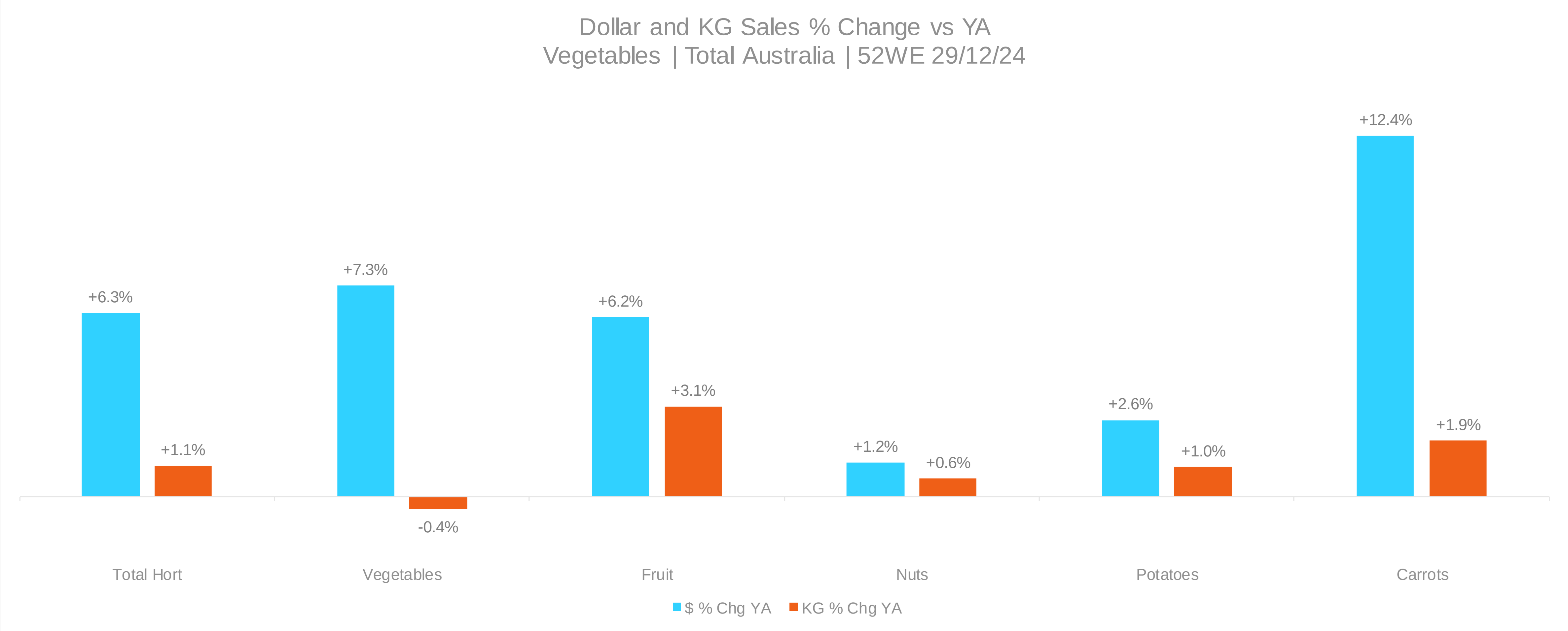
Performance Summary

- The total Vegetables market recorded positive growth in dollar sales (+7.3%), while declining marginally in volume sales (-0.4%) in the latest year. The Fruit market however, performed ahead of total Vegetables in volume sales (+3.1%).
- Compared to last year, there has been an increase of +7.7% in the average price per kilogram of Vegetables, with prices in this market growing faster than Fruit average prices (+3.0%).
- Annual purchase frequency levels shifted positively across total Vegetables this year, this was also the case across the Fruit market. Whilst households are spending more per trip, they are purchasing less volume each time (approx. 100g).
- All retail channels are driving the dollar sales growth for total Vegetables versus the year prior, with Major Supermarkets and Greengrocers/markets driving the decline in volume sales.
- Whilst both prepacked and loose formats have registered dollar sales growth this year, volume sales have declined across the loose Vegetables market.
- Total Vegetables volume sales are declining across Small Scale and Bustling Families, and Senior Couple household groups this year.

How is Total Vegetables performing?

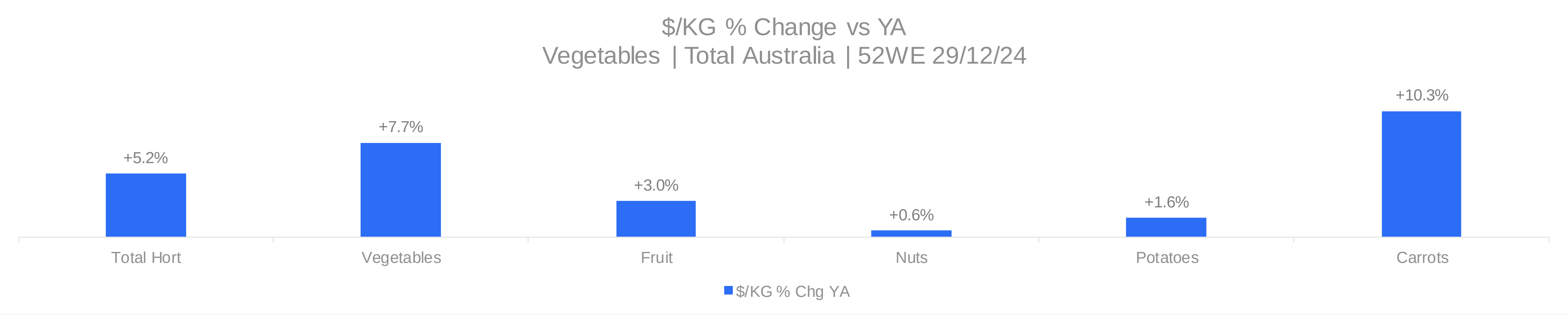
Total Vegetables recorded dollar sales growth of +7.3%, however registered a marginal decline in volume (kilograms) sales this year of -0.4%.

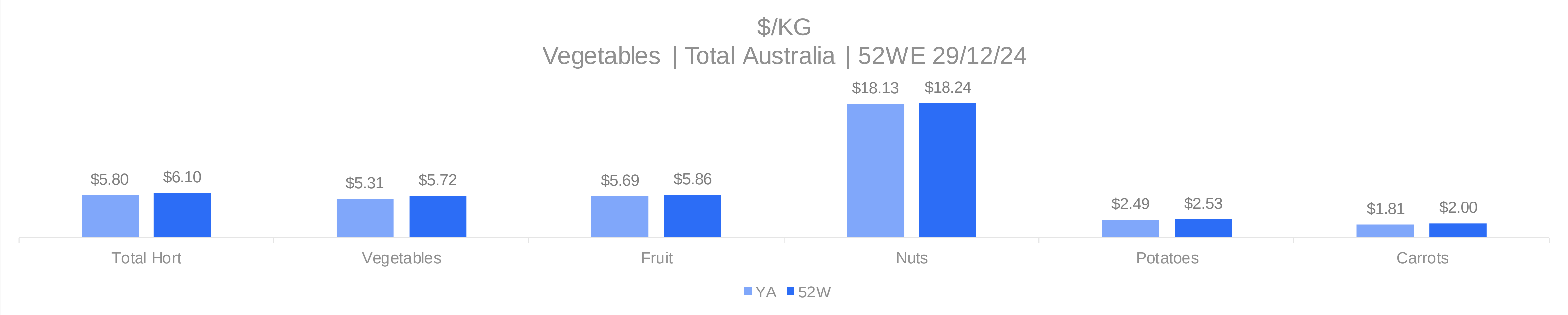
Total Fruit performed ahead of Vegetables in volume sales.



Source: NielsenIQ

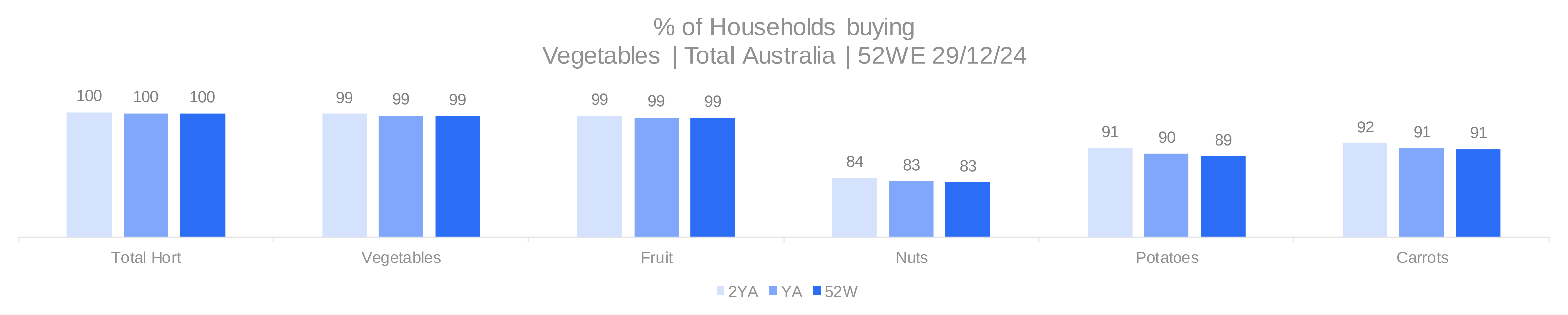
Versus year ago, the Vegetables market recorded an increase of +7.7% in average price per kilogram, ahead of total Fruit, at +3.0%.

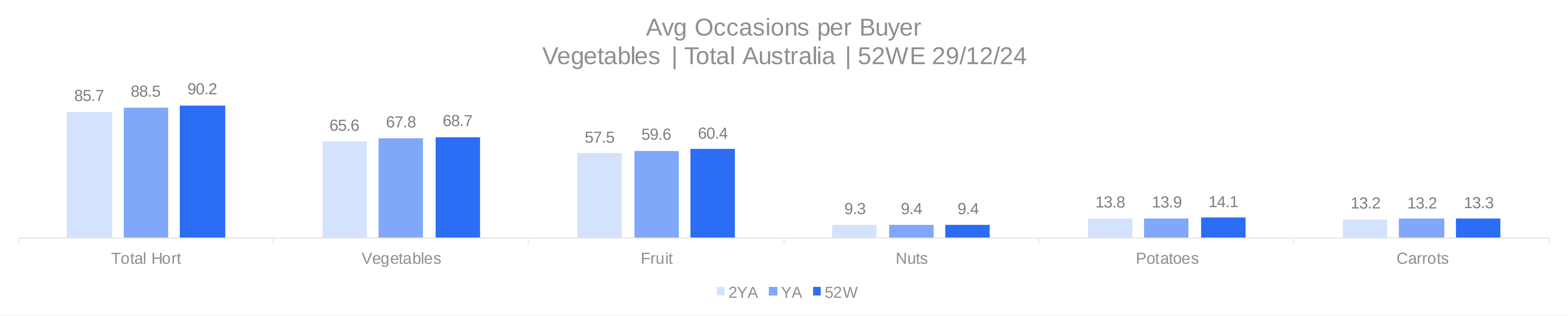




Source: NielsenIQ

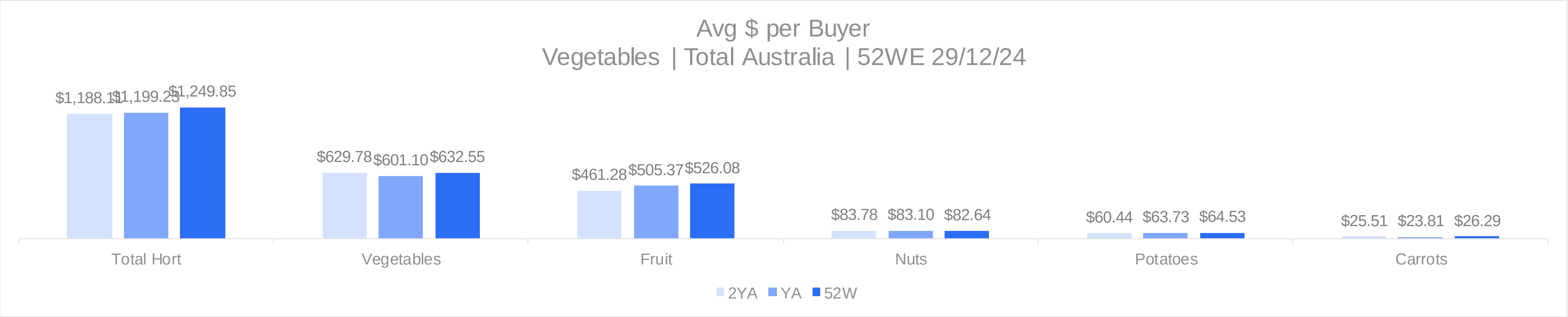
Annual purchase frequency levels shifted positively across total Vegetables this year - this was also the case across the Fruit market.

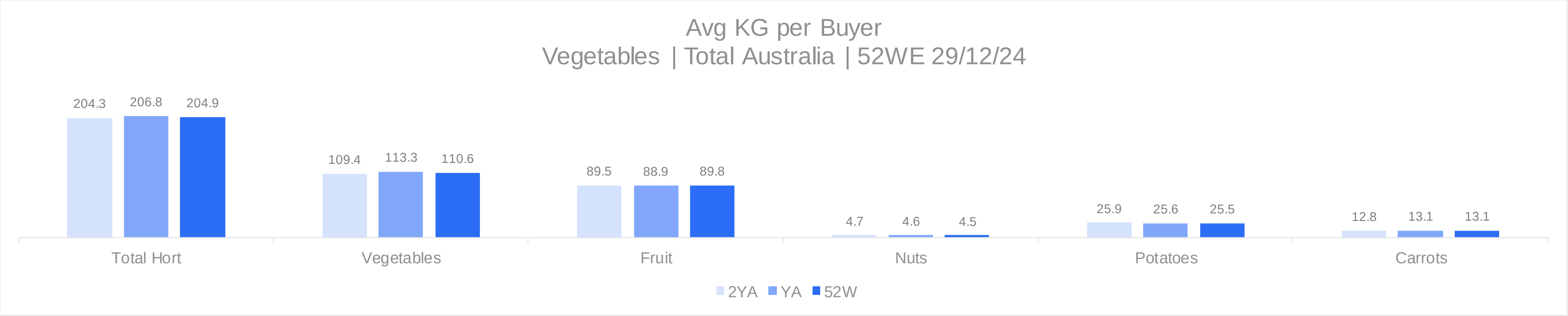




Source: NielsenIQ

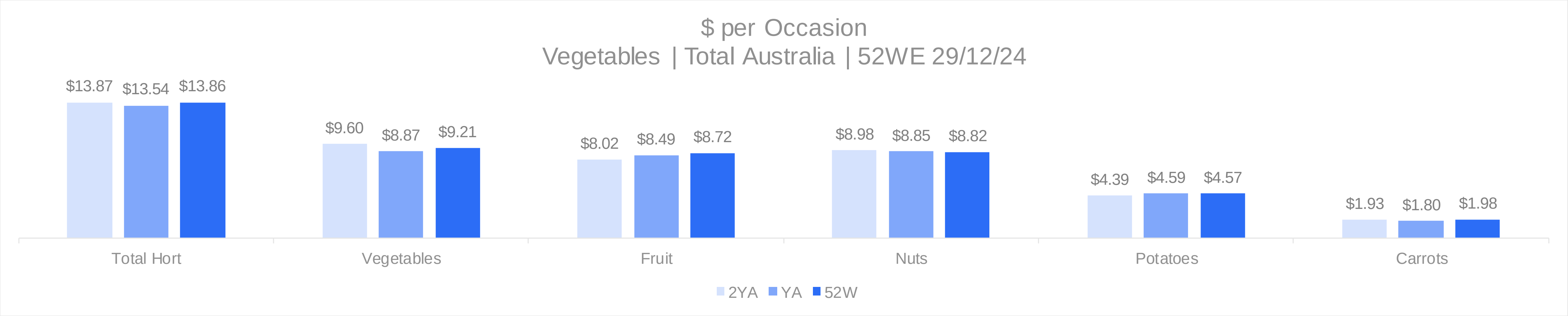
Increased prices have propelled the growth in annual spend levels for total Vegetables this year, while average kilograms purchased per household declined.

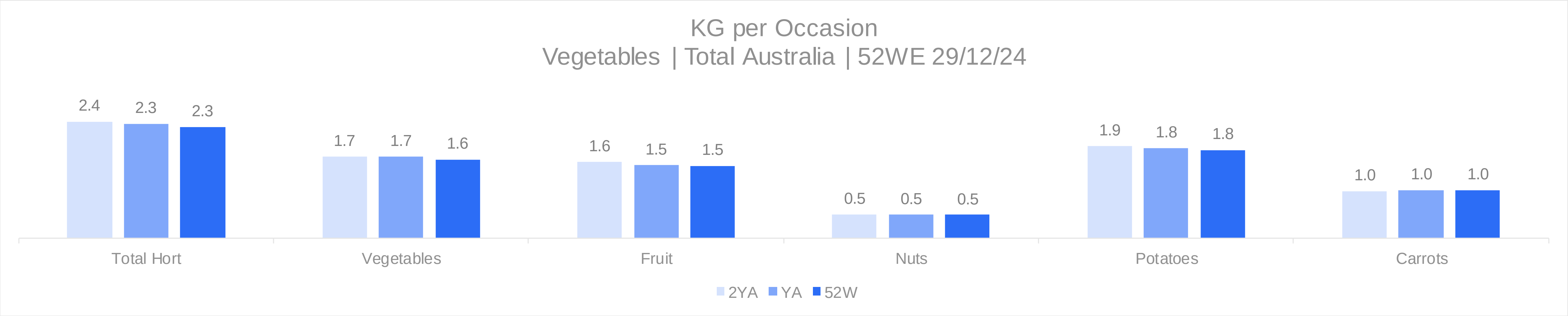




Source: NielsenIQ

Vegetables annual spend levels have increased as households spend more each purchase occasion, they are however buying approx. 100g less per trip.





Source: NielsenIQ

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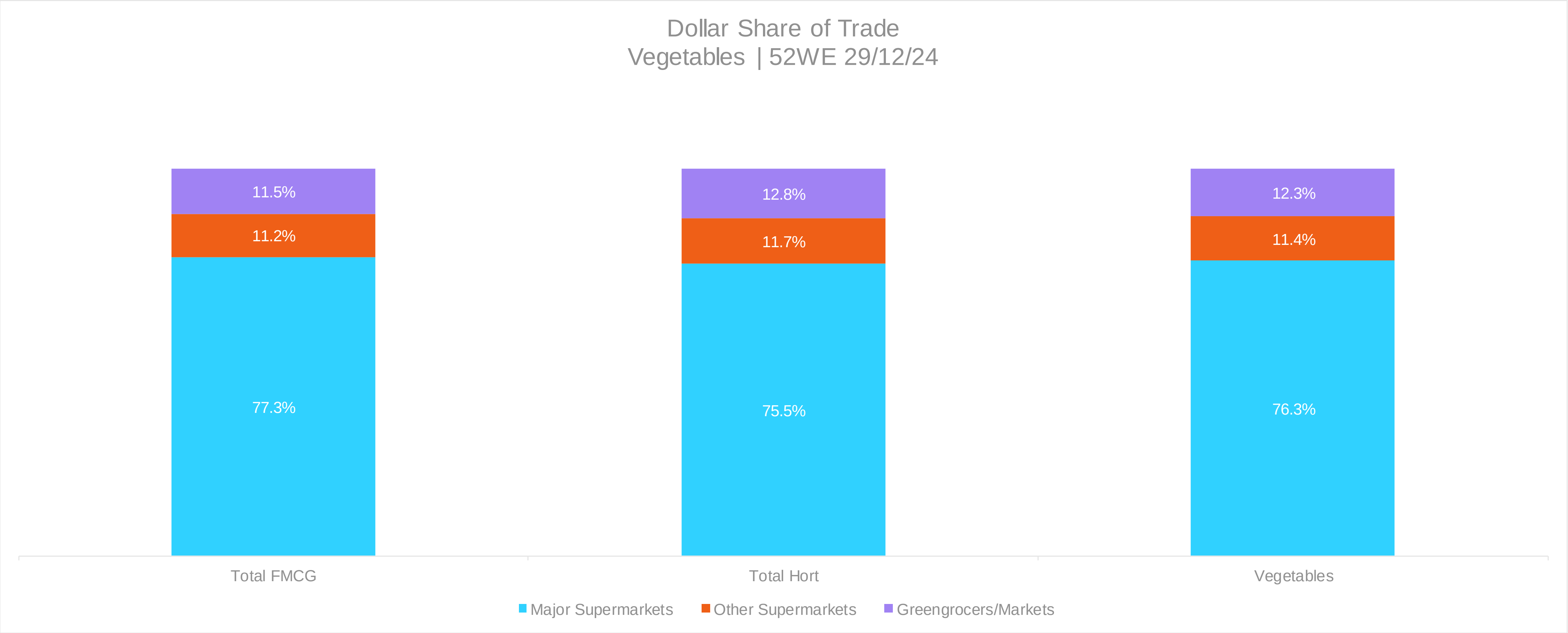
Which Retailers are winning/losing?

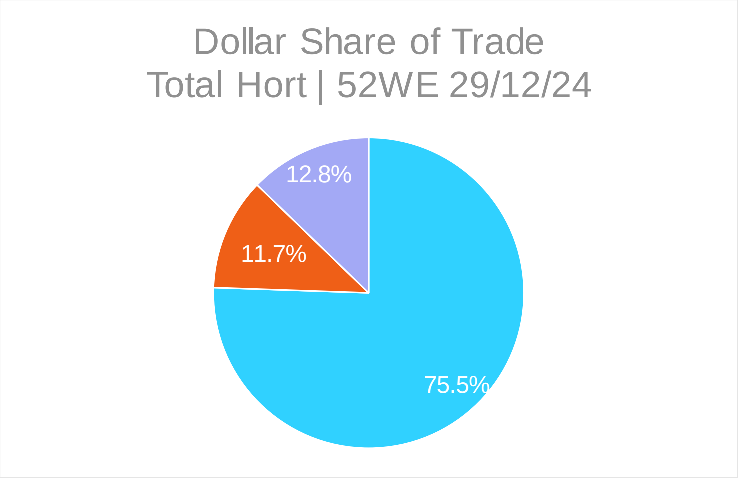
Major supermarkets under-trade slightly in Total Vegetables sales, when compared to the distribution of total FMCG dollar sales.

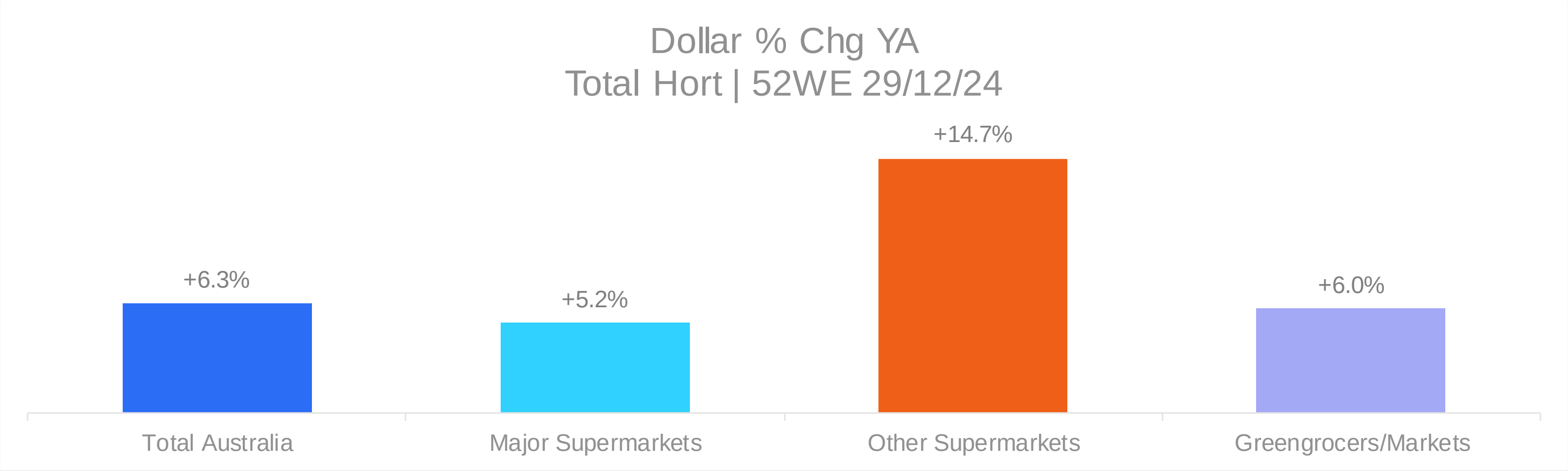


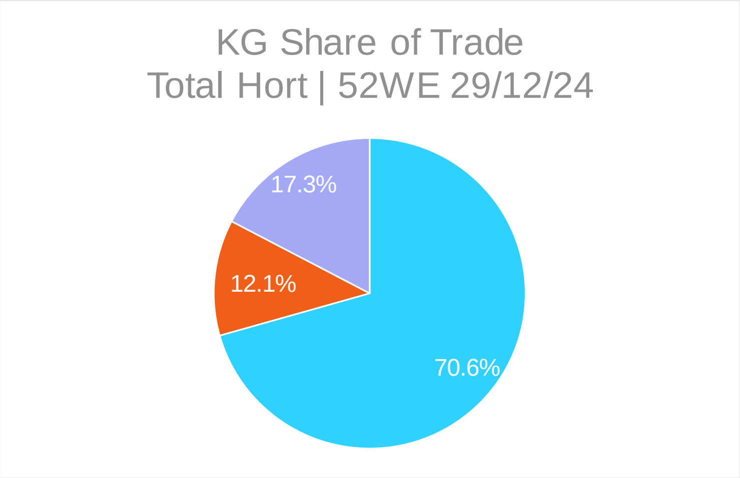
Source: NielsenIQ

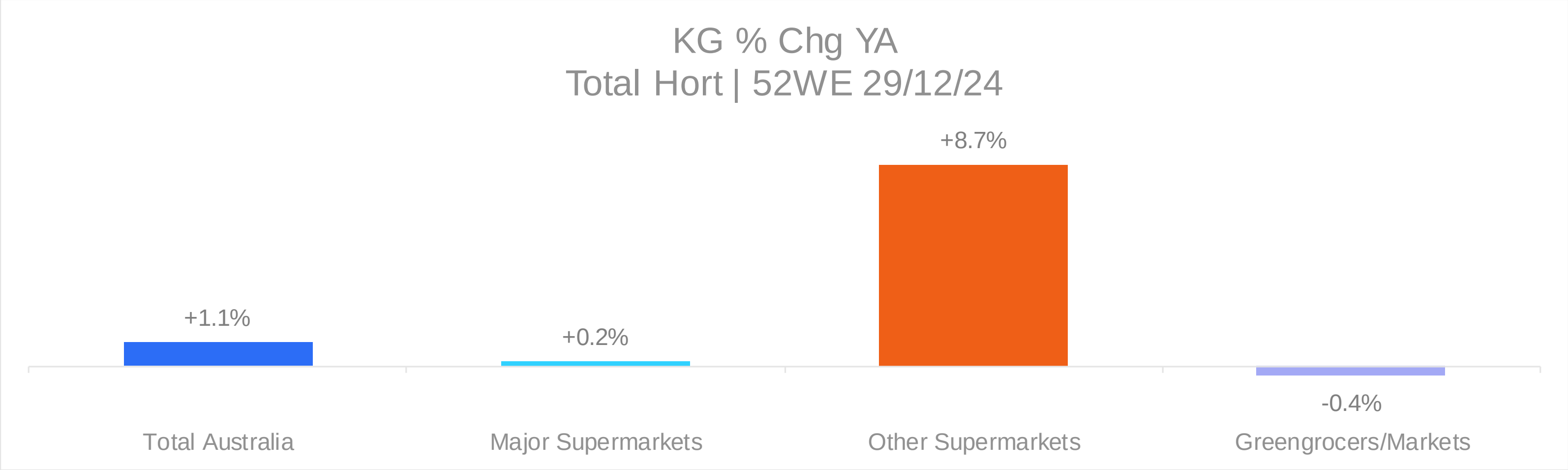
Other Supermarkets have recorded strong dollar and volume sales growth this year for total market ie. Vegetables, Fruit, Dried Fruit/Nuts.

Whilst Greengrocers/Markets have recorded dollar sales growth, volume sales have declined.



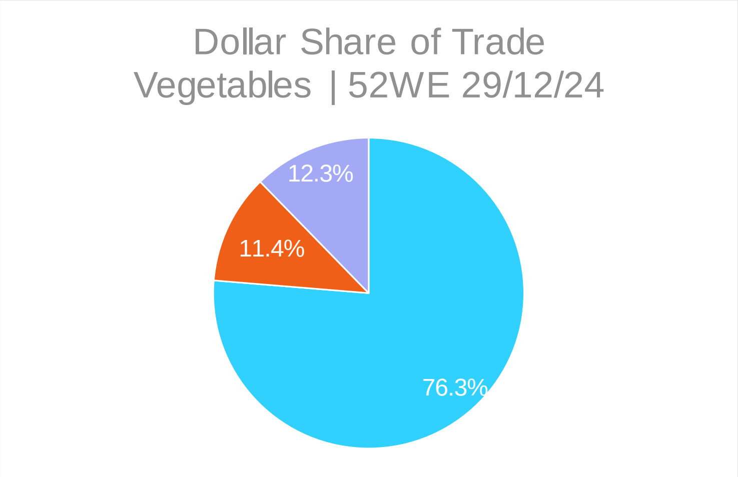


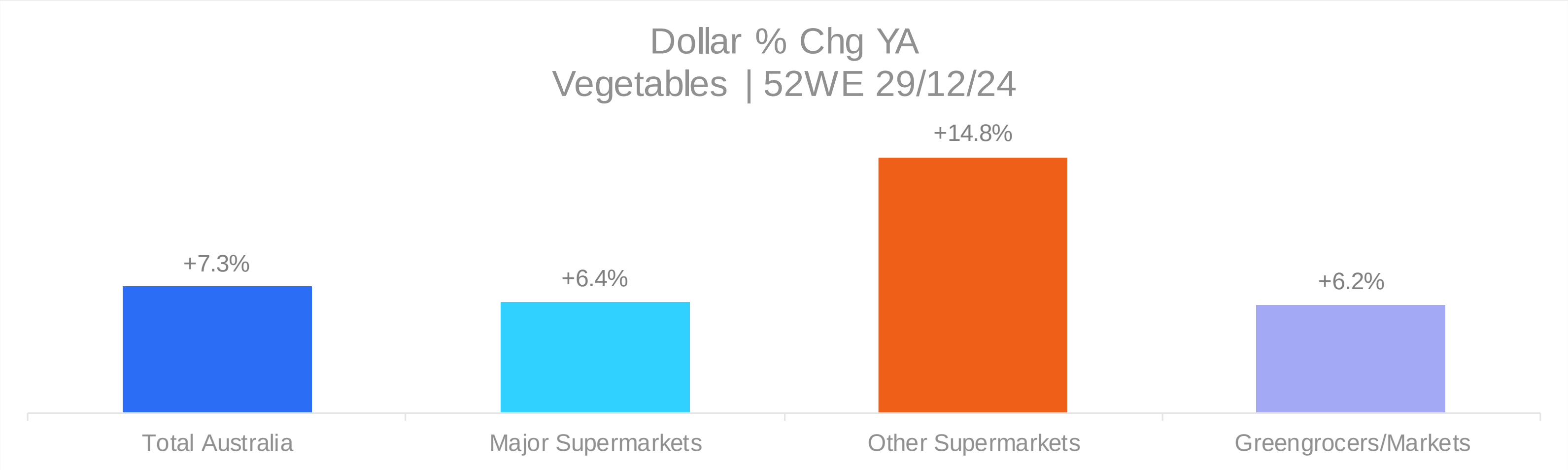


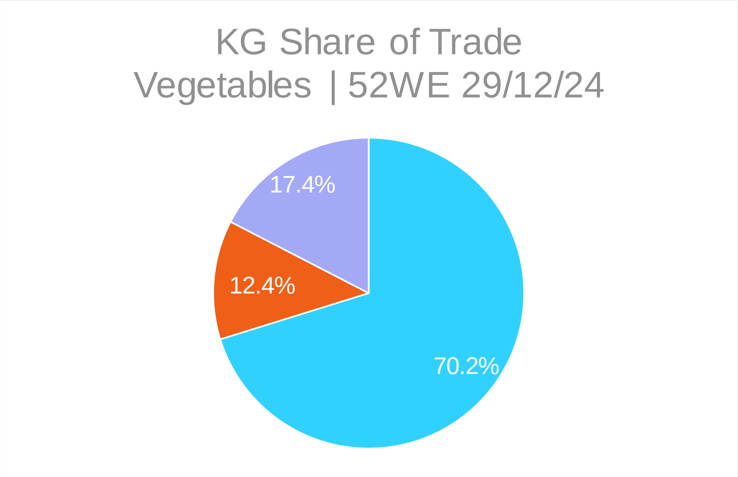


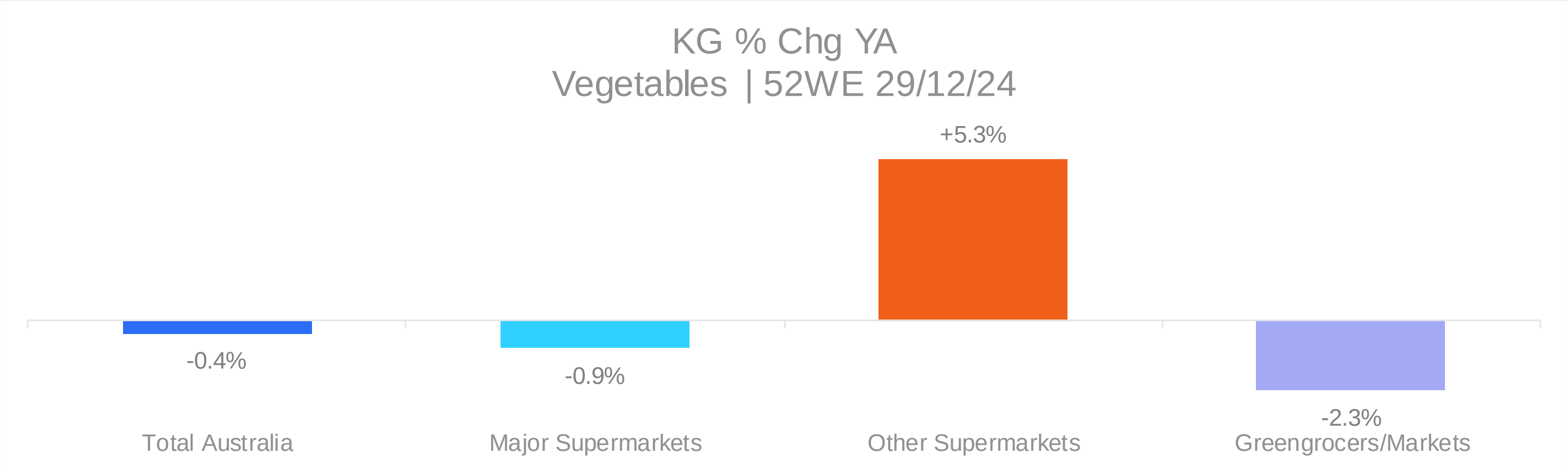
Source: NielsenIQ

Whilst all retail channels have registered dollar sales growth for total Vegetables, volume sales have declined across Major Supermarkets and Greengrocers/Markets.









Source: NielsenIQ

Prepacked versus Loose Total Vegetables

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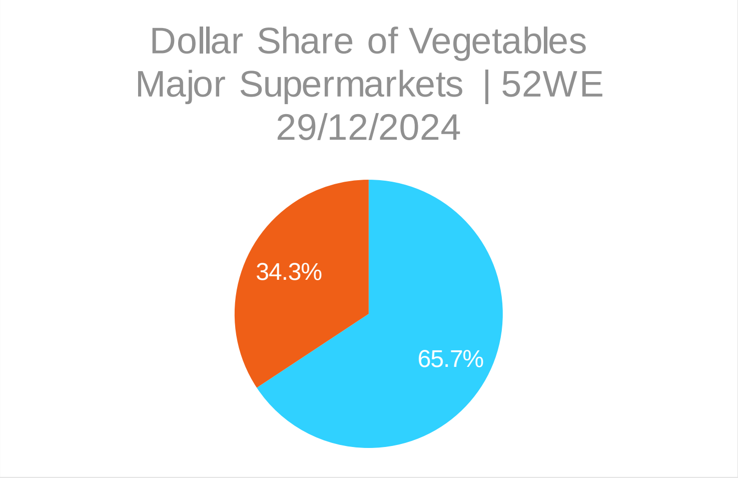
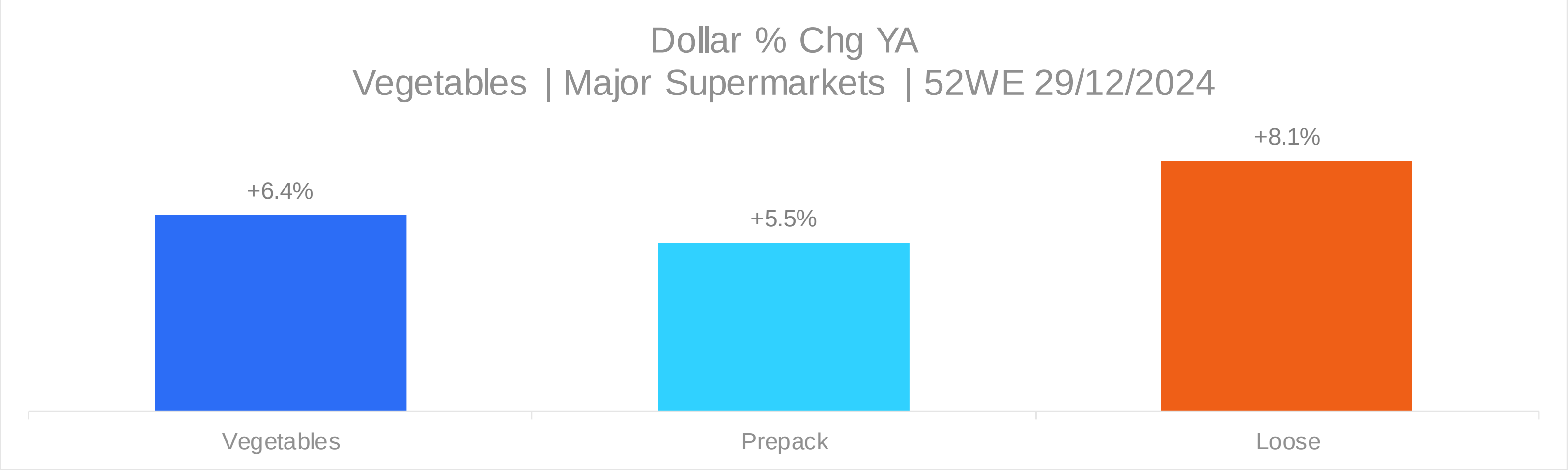
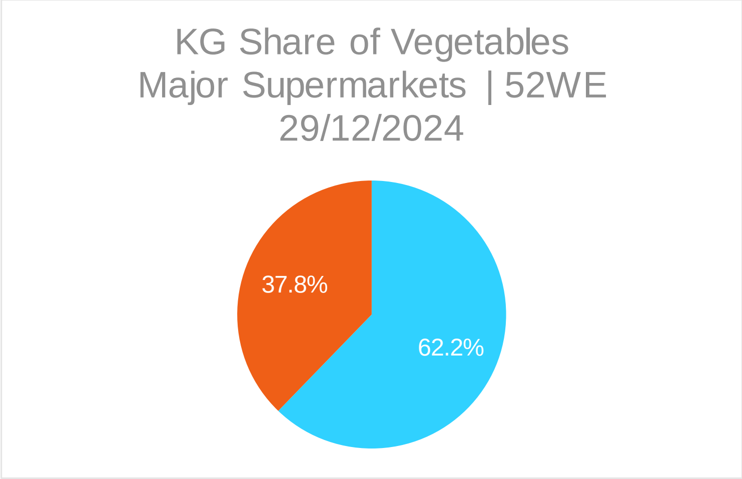
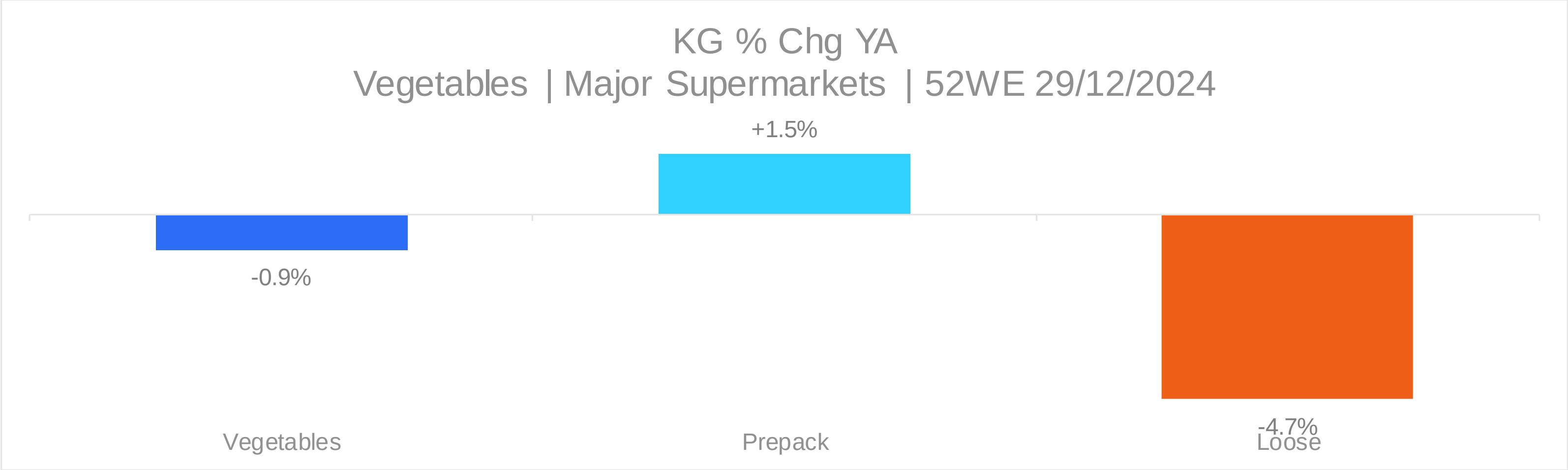
All formats are registering dollar sales growth this year, with loose Vegetables the key driver of volume sales declines across Major Supermarkets.



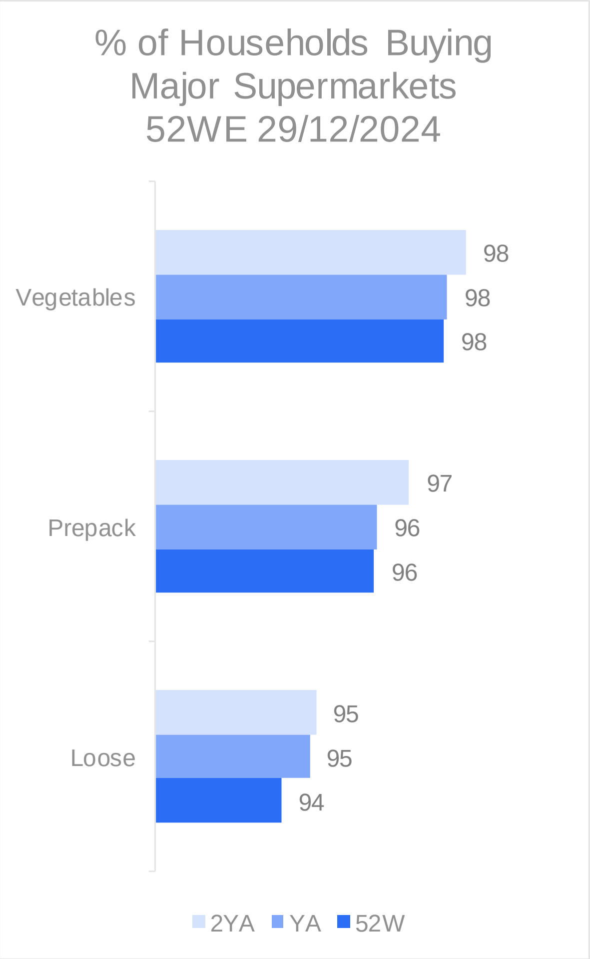


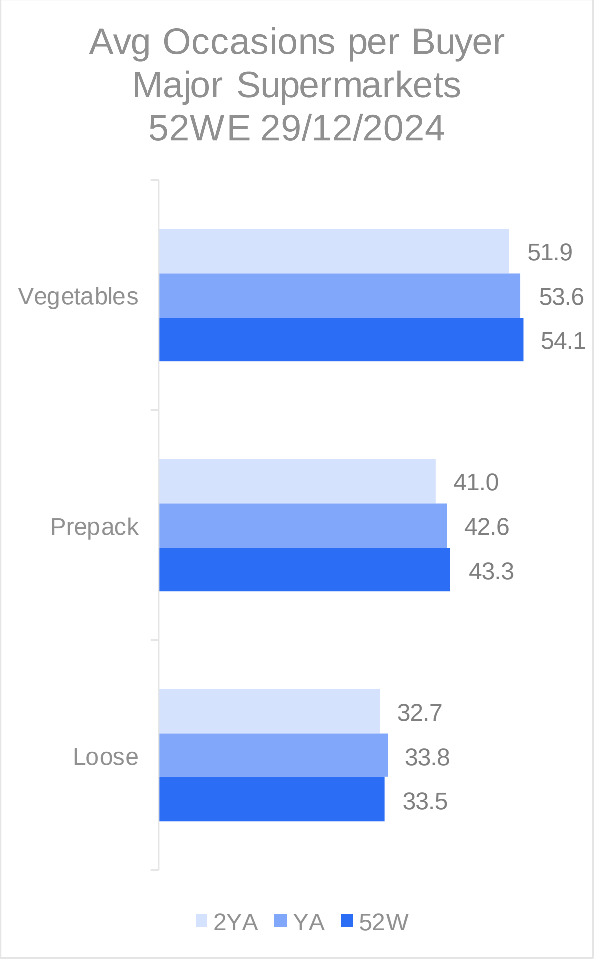


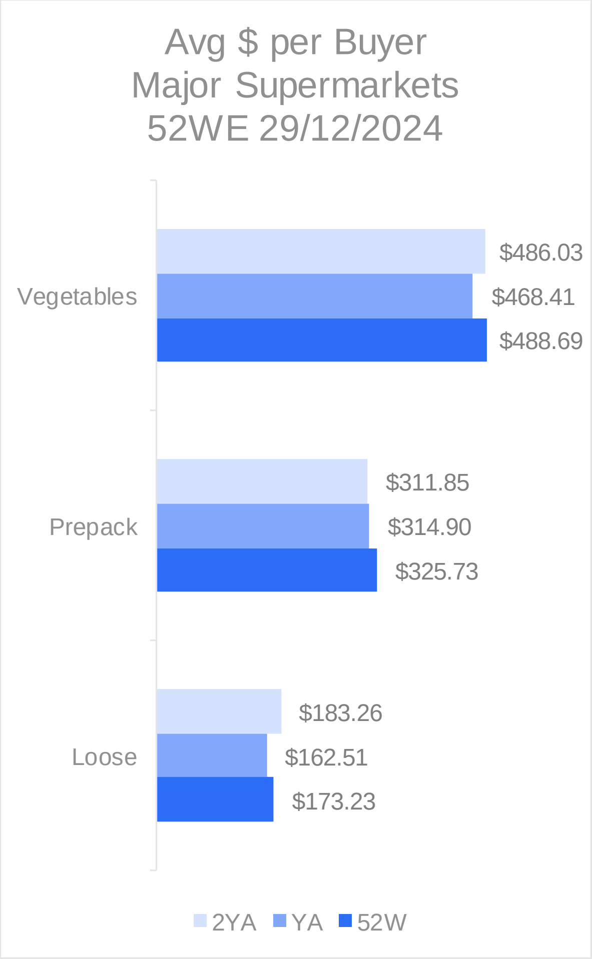


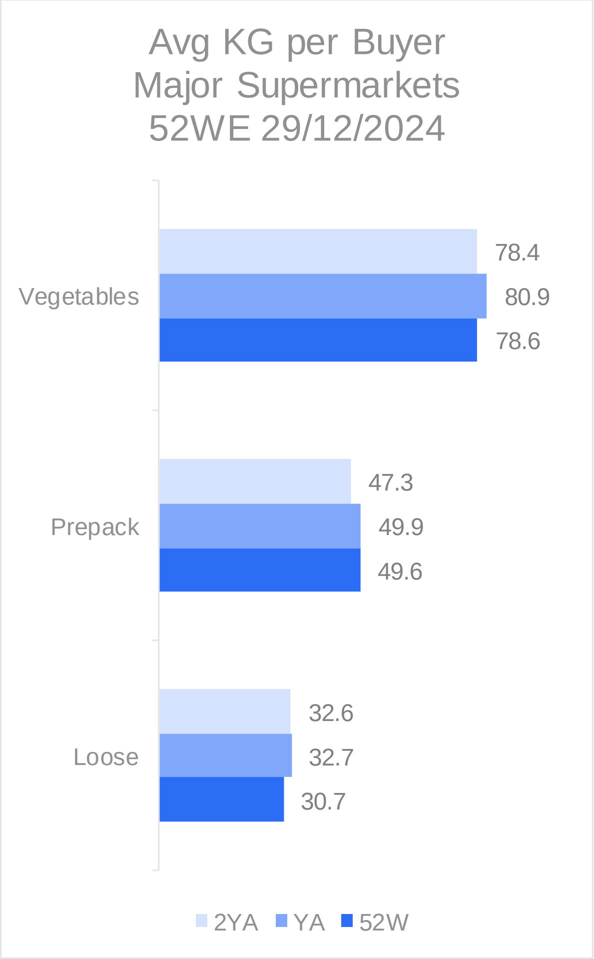
Source: NielsenIQ

There are fewer buyers purchasing across loose Vegetables in Major Supermarkets this year, with annual purchase frequency levels also trending down relative to year ago.



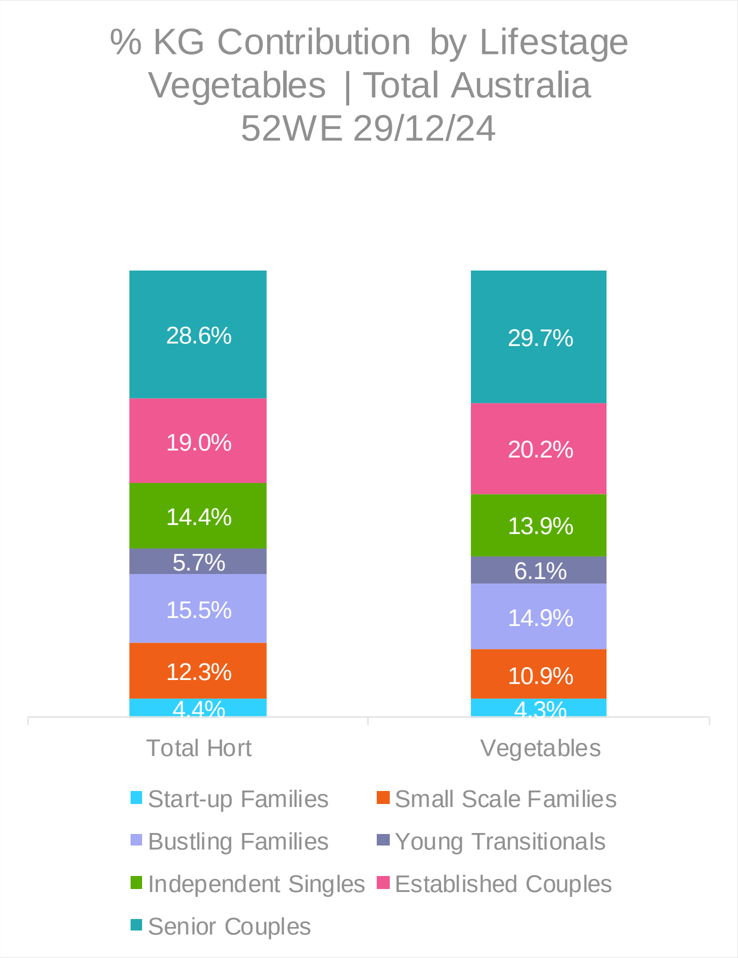


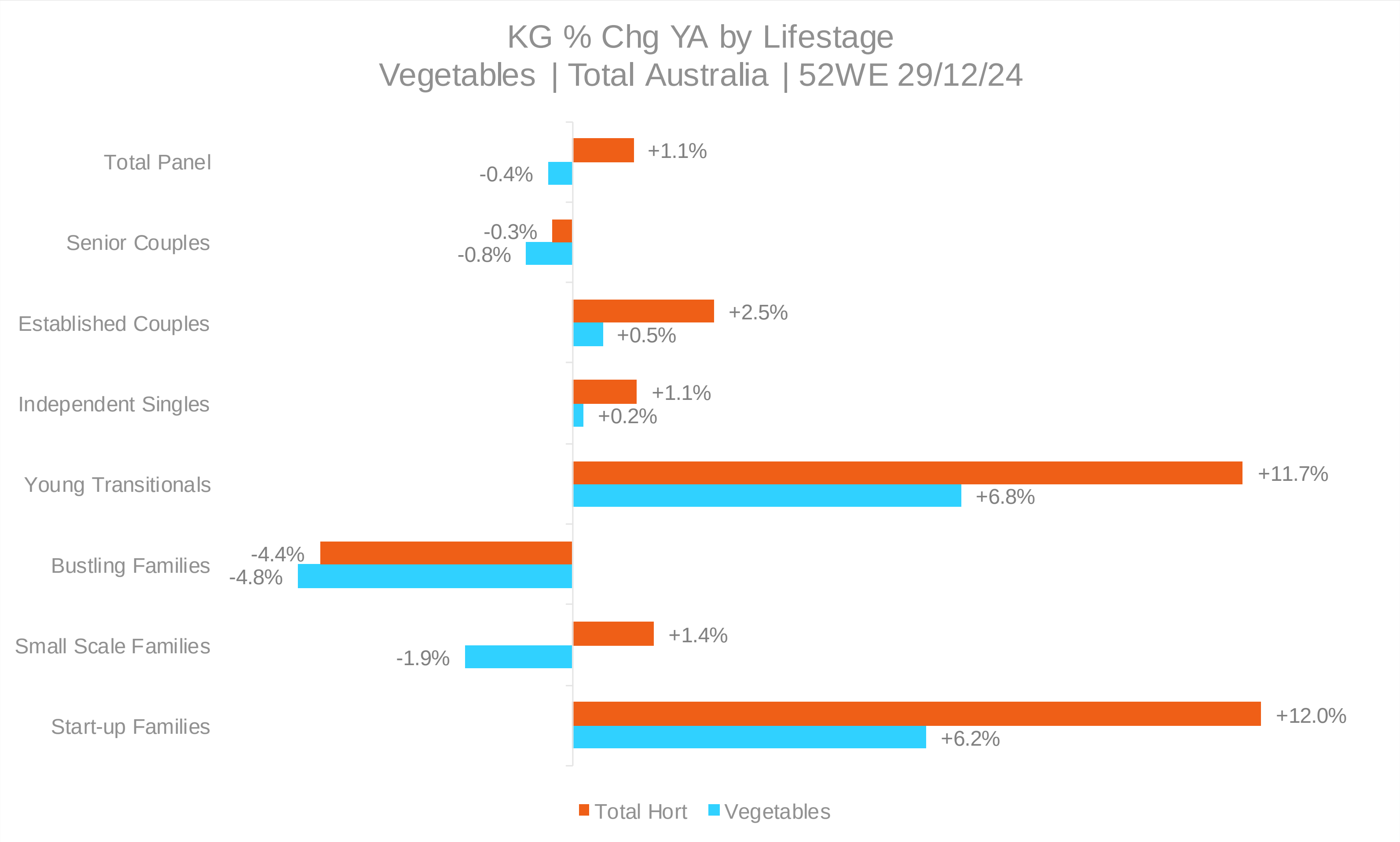




How did the different customer groups behave?

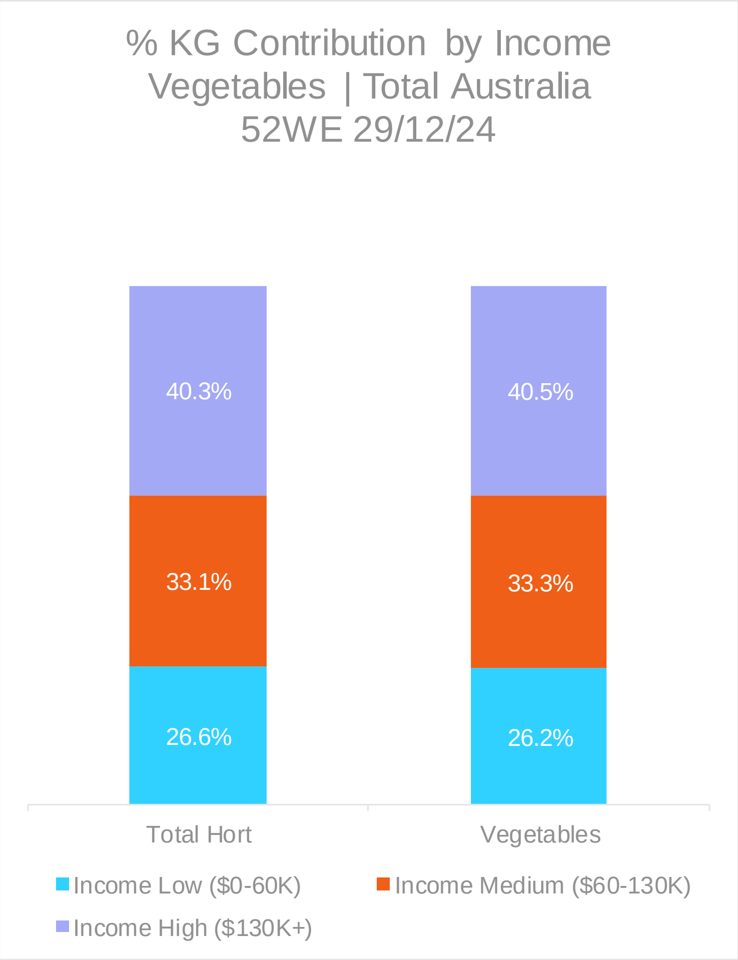
Relative to year ago, Vegetables volume sales are declining within Small Scale and Bustling Families, and Senior Couples household groups.

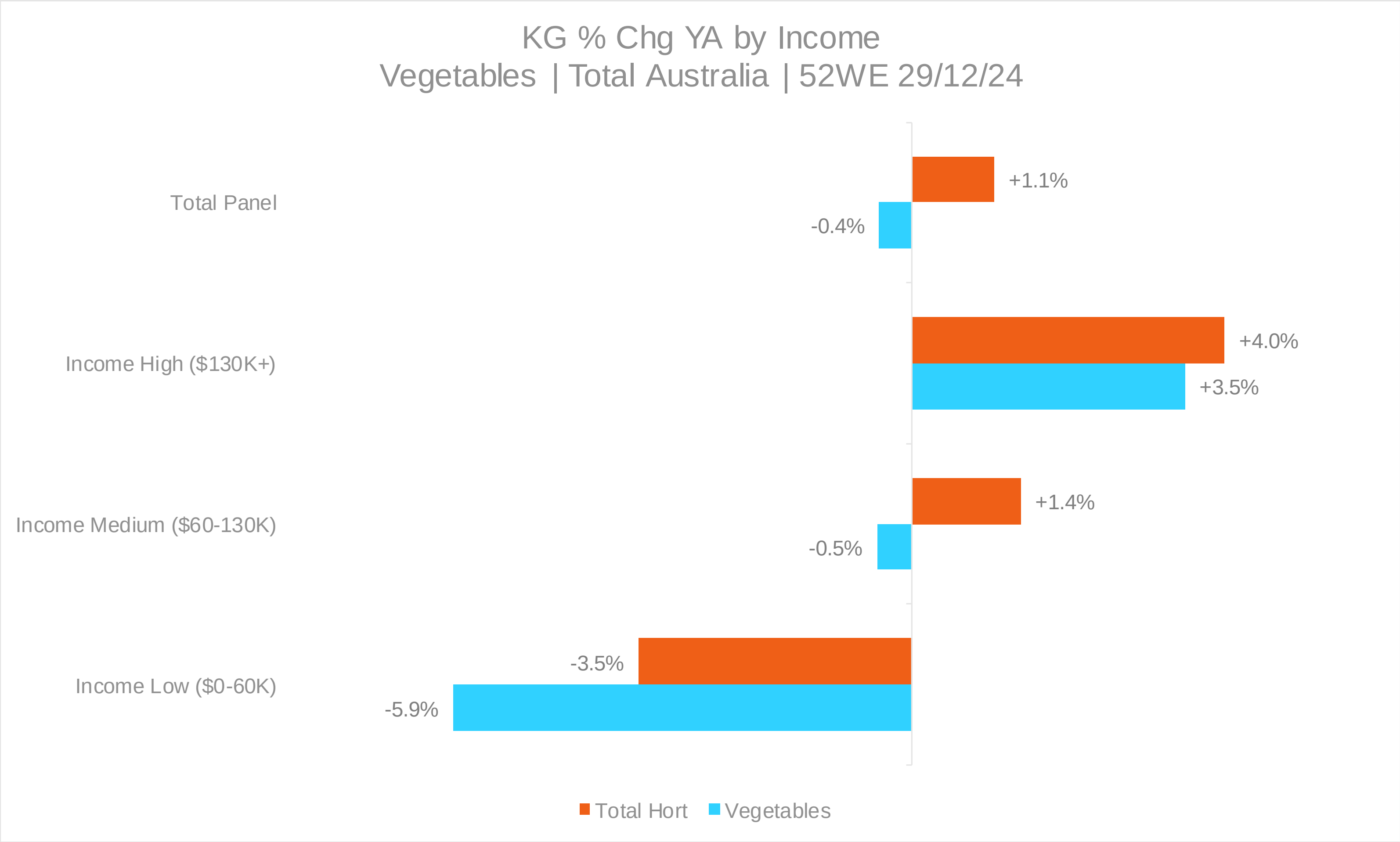




Source: NielsenIQ | * Low Sample Size, Do Not Use

Medium and Low income groups are driving the decline in total Vegetables volume sales this year, with High income households registering a volume sales uplift.





Source: NielsenIQ

Thank you