Cabbage Comprehensive Review 2025

NIQ

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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

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Analysis Parameters

Time Periods
52 weeks to 02/11/2025 versus YA versus 2YA

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

- Cabbage recorded strong dollar sales and retail volume growth of +9.1% and +20.3% respectively, with volume growth outperforming total market and all comparable categories this year.
- As a key driver of volume growth, average price per kilogram dropped by –9.3%, in contrast to total market and most other comparable categories where higher prices are evident.
- More households purchased cabbage this year, with penetration reaching 52%, the highest point in the last three years. While purchase frequency levels remained stable, shoppers purchased heavier volumes per occasion, lifting annual volumes by an average of 300g per household.
- All retail channels posted dollar sales and volume growth, with non-major supermarkets and greengrocers/markets outpacing major supermarkets.
- Driven by fewer buyers, prepacked cabbage volumes declined by –2.9% across major supermarkets this year, dampening the growth registered across this channel.
- Volume growth is evident across all household types this year, with particularly strong results amongst families with children.

How is cabbage performing?

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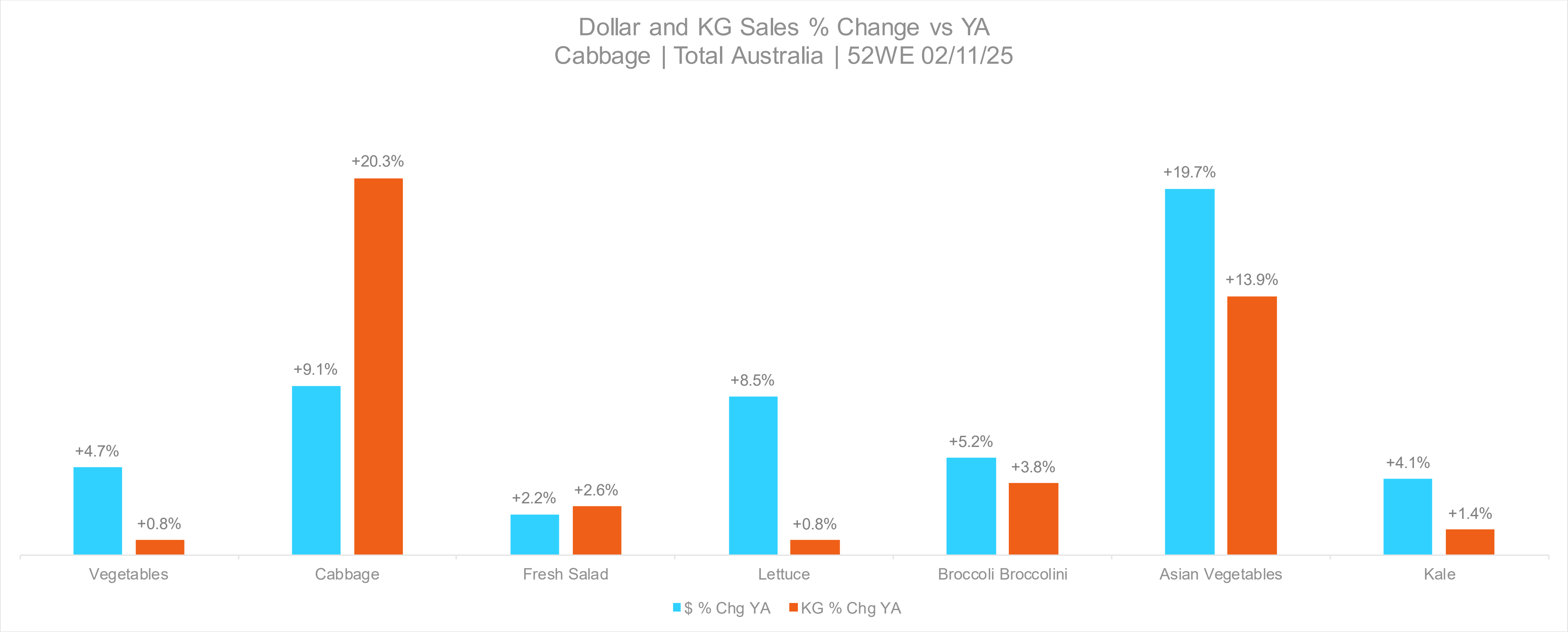
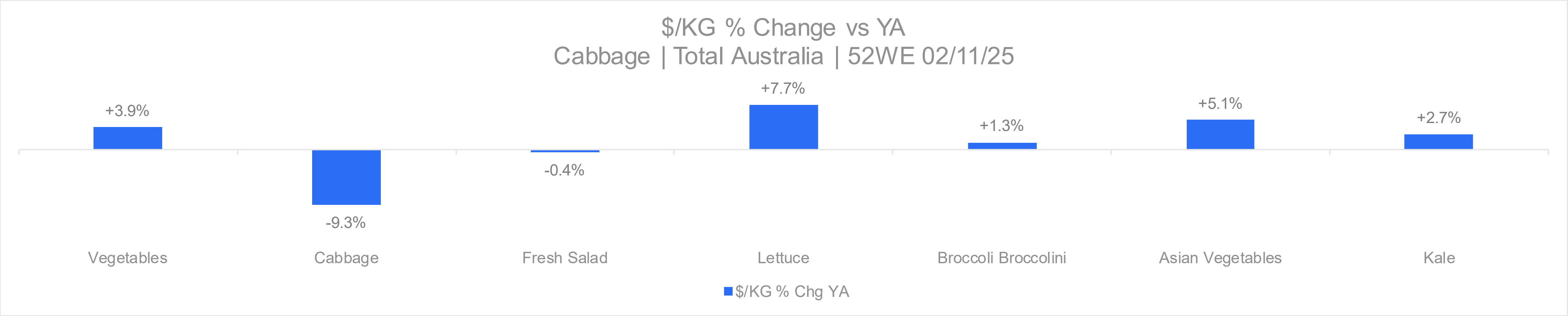
With dollar sales and retail volume growth of +9.1% and +20.3% respectively, cabbage volume growth is well ahead of total market and all comparable vegetables this year.

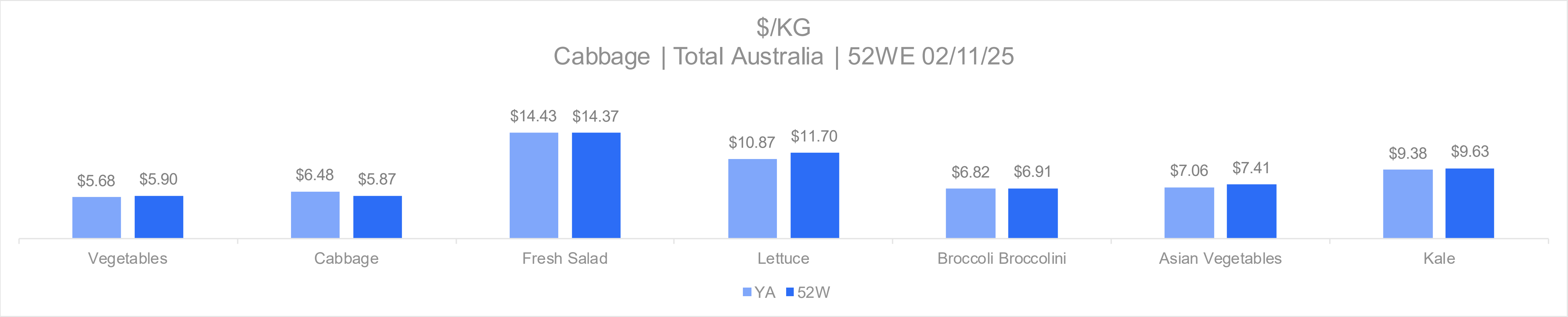


Source: NielsenIQ

Supporting strong volume growth, cabbage average price per kilogram dropped by –9.3% this year.

In contrast, with the exception of fresh salad, higher prices are evident across all comparable vegetables this year.

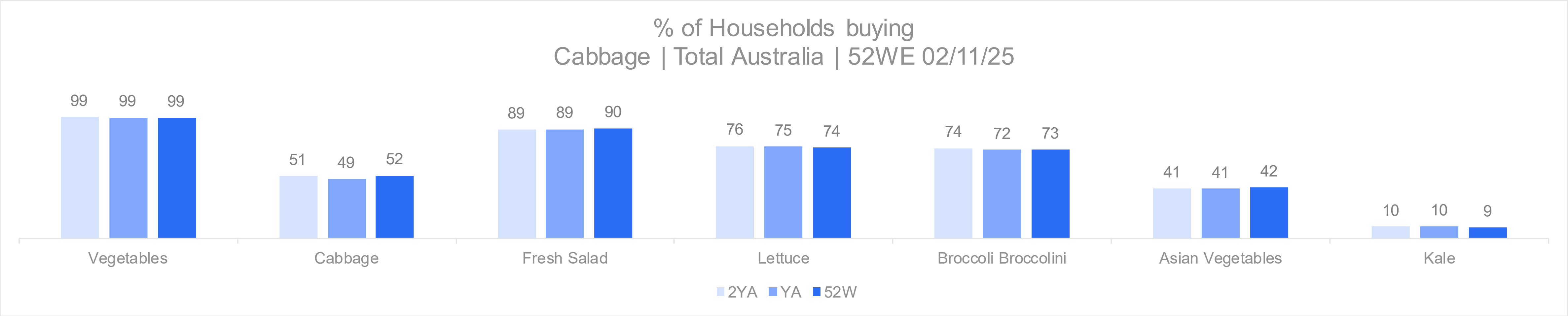


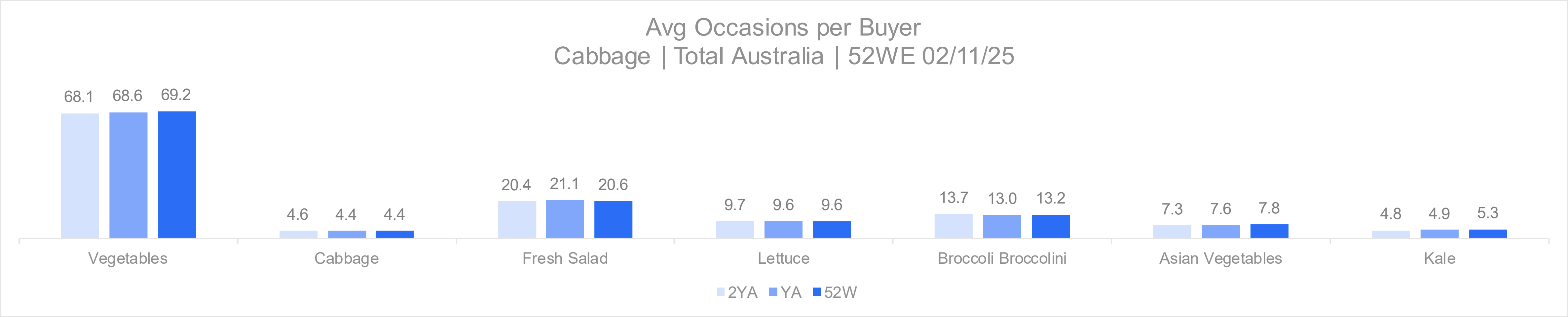


Source: NielsenIQ

Cabbage volumes are ahead of last year as a result of more households buying, with penetration growing to the highest level of the last three years, to 52%.

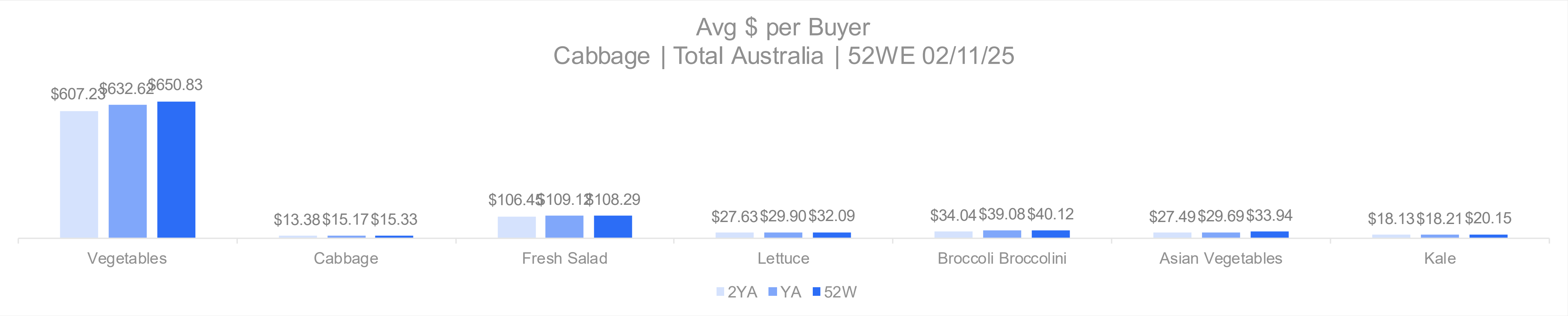
Cabbage purchase frequency levels are unchanged, despite growth observed at a total market level this year.

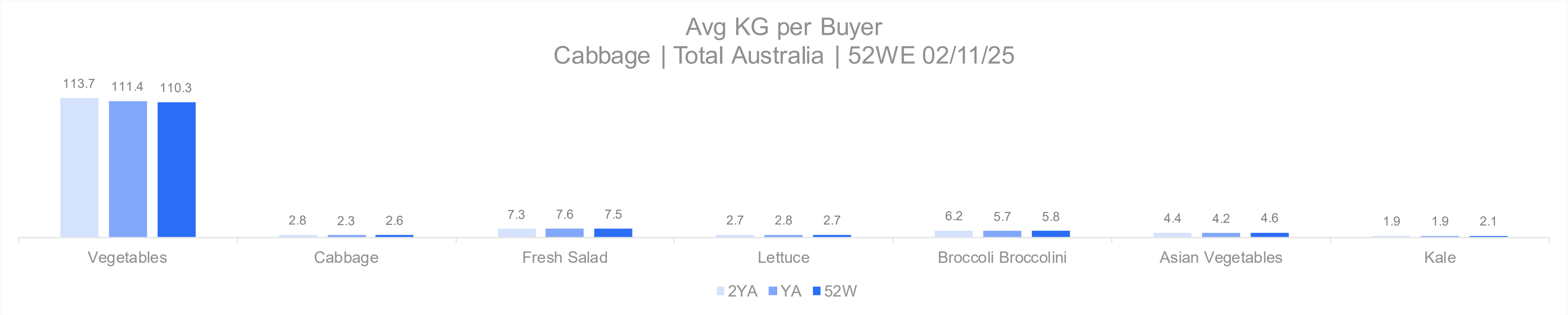




Source: NielsenIQ

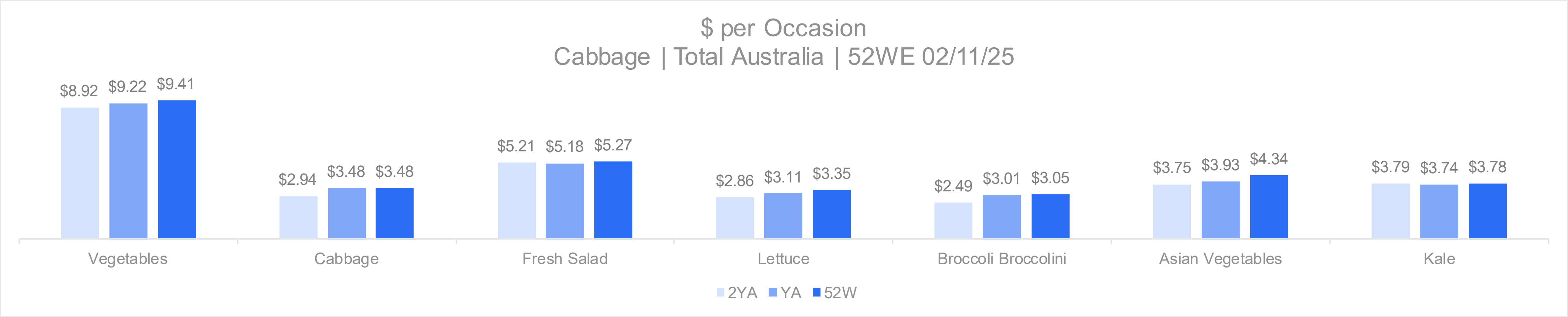
Annual purchase volumes have grown for cabbage this year with shoppers now buying 2.6 kilograms per household.

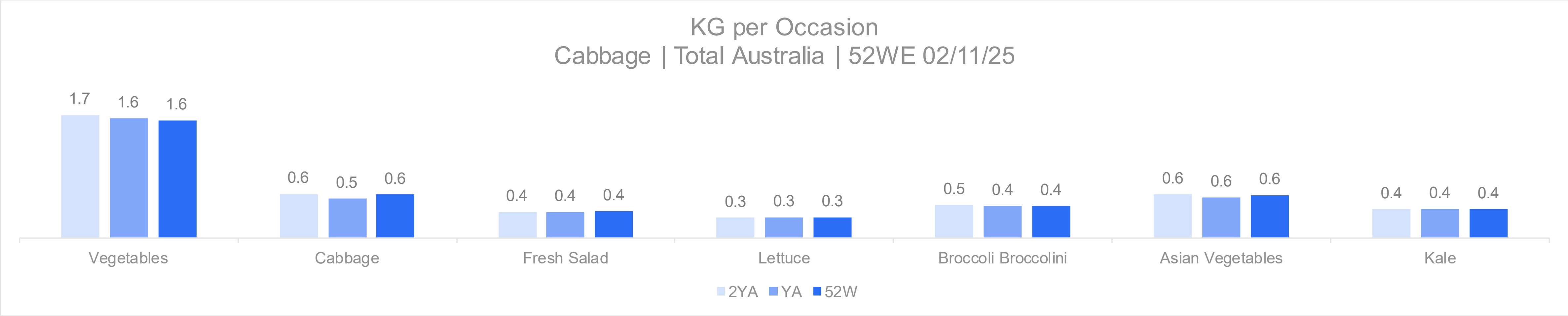




Source: NielsenIQ

Annual purchase volumes have grown as shoppers buy 100g more each trip.

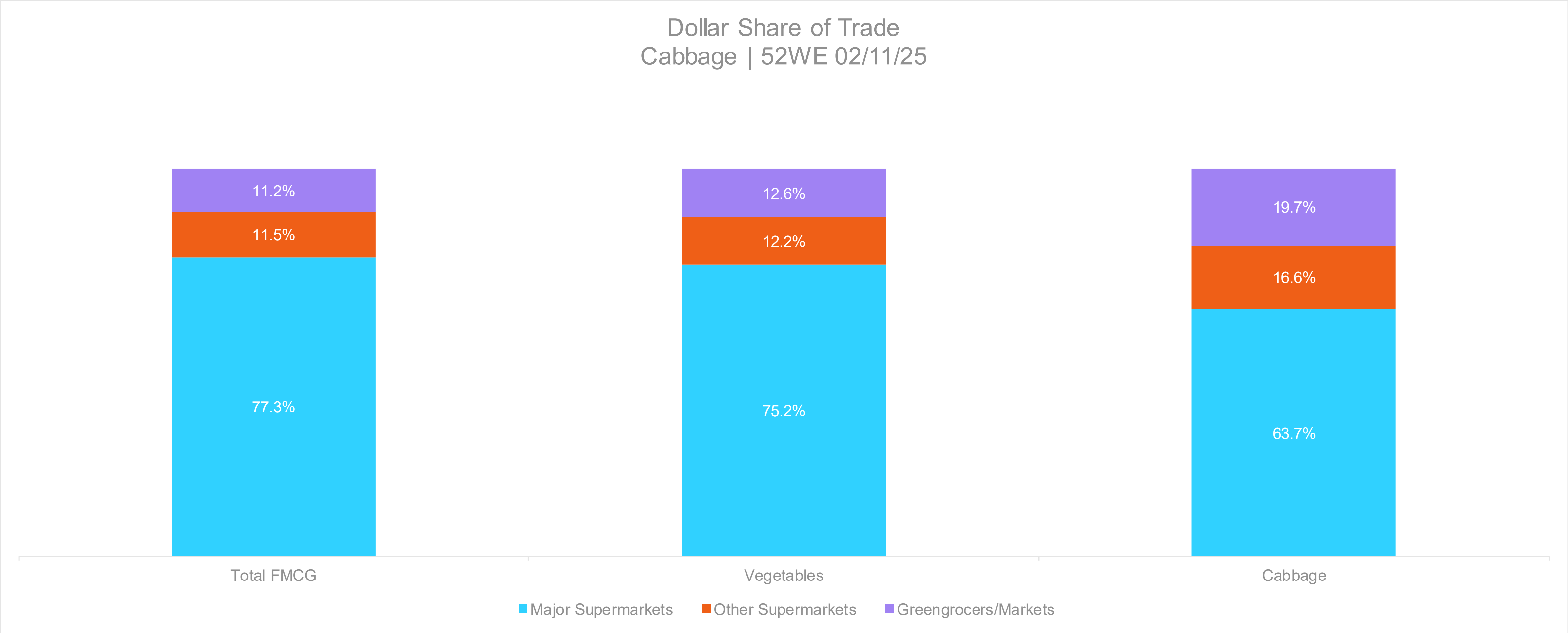




Source: NielsenIQ

Which retailers are winning/losing?

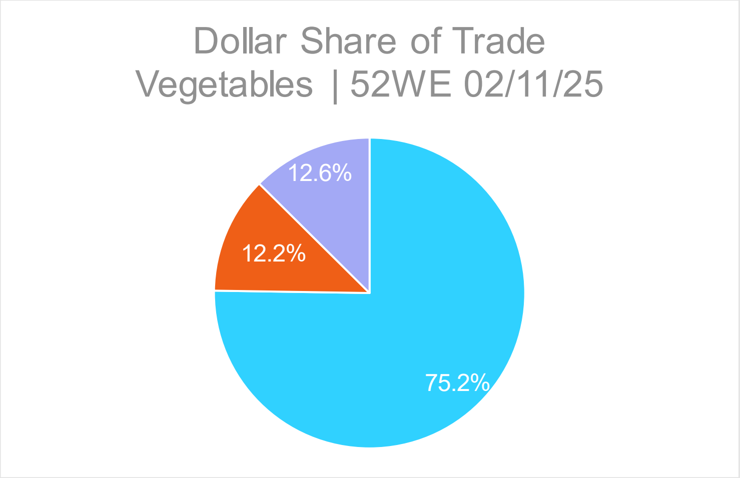
Major supermarkets under-trade in cabbage dollar sales, when compared to total vegetables and the FMCG market.

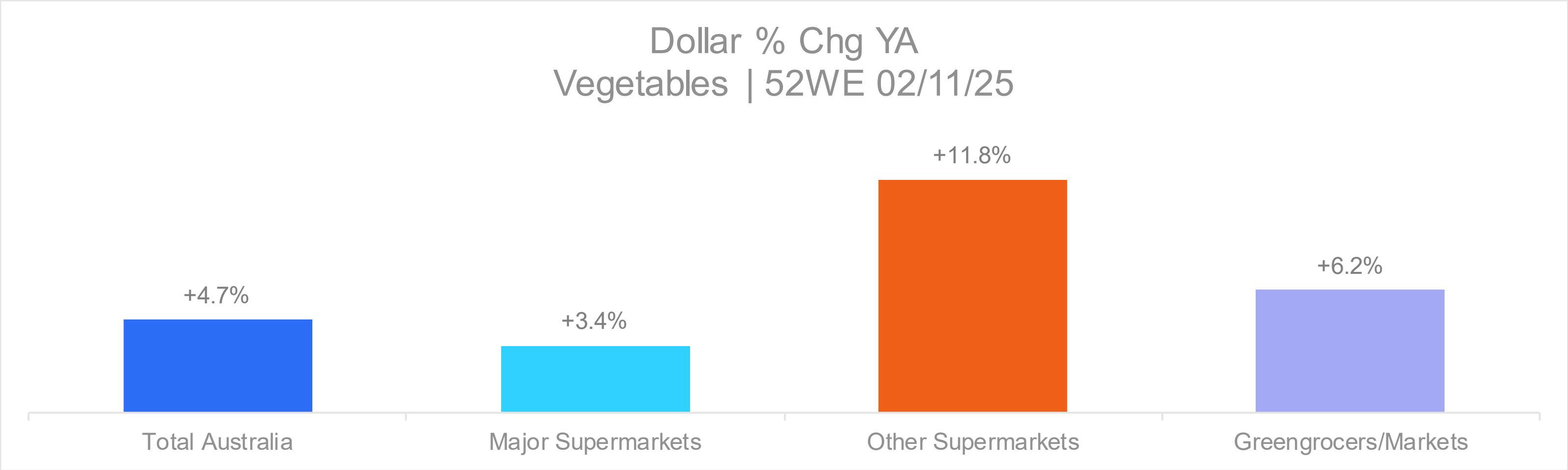


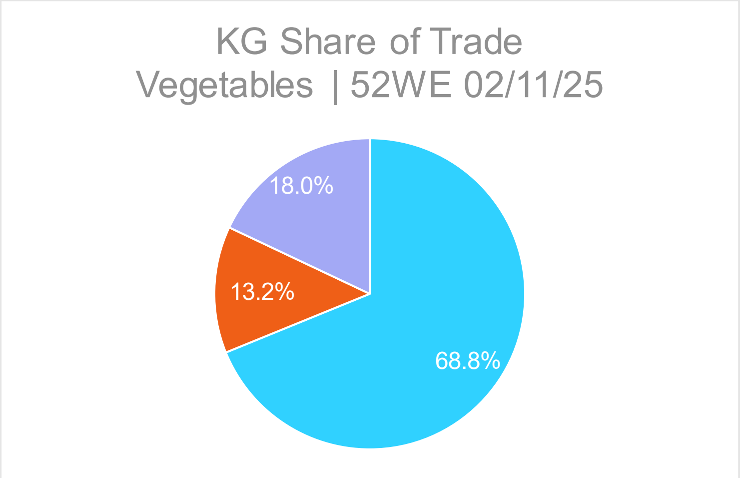
Source: NielsenIQ

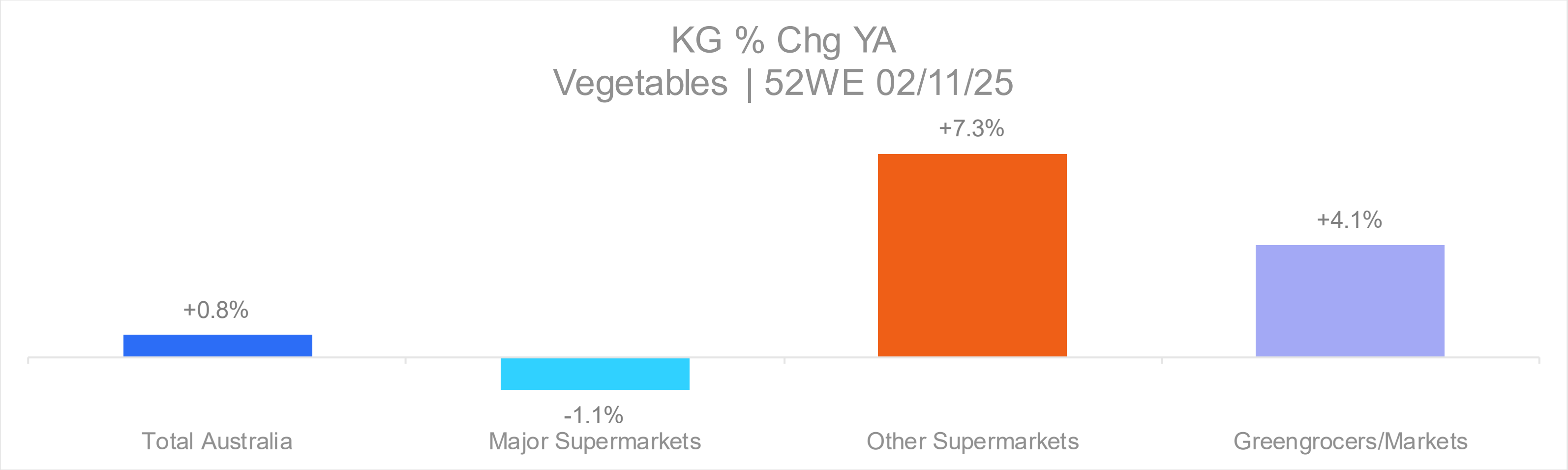
Non major supermarkets and greengrocers/markets are driving dollar sales and volume growth for fresh vegetables this year, outpacing the majors.

Volume losses from major supermarkets have been negated by gains from other channels this year.



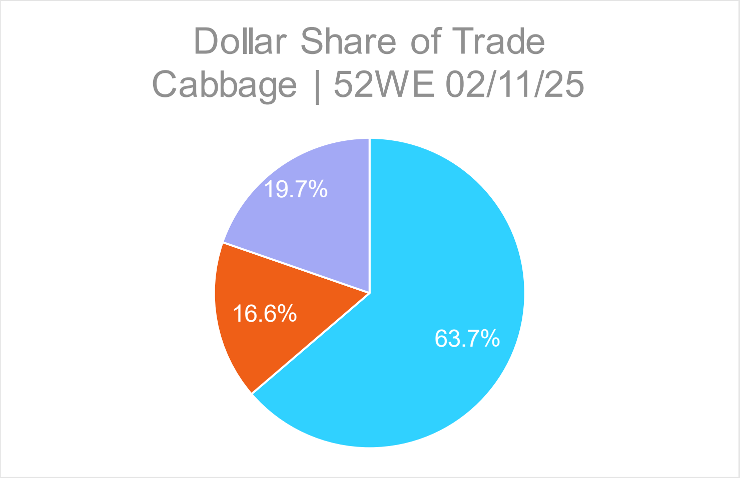


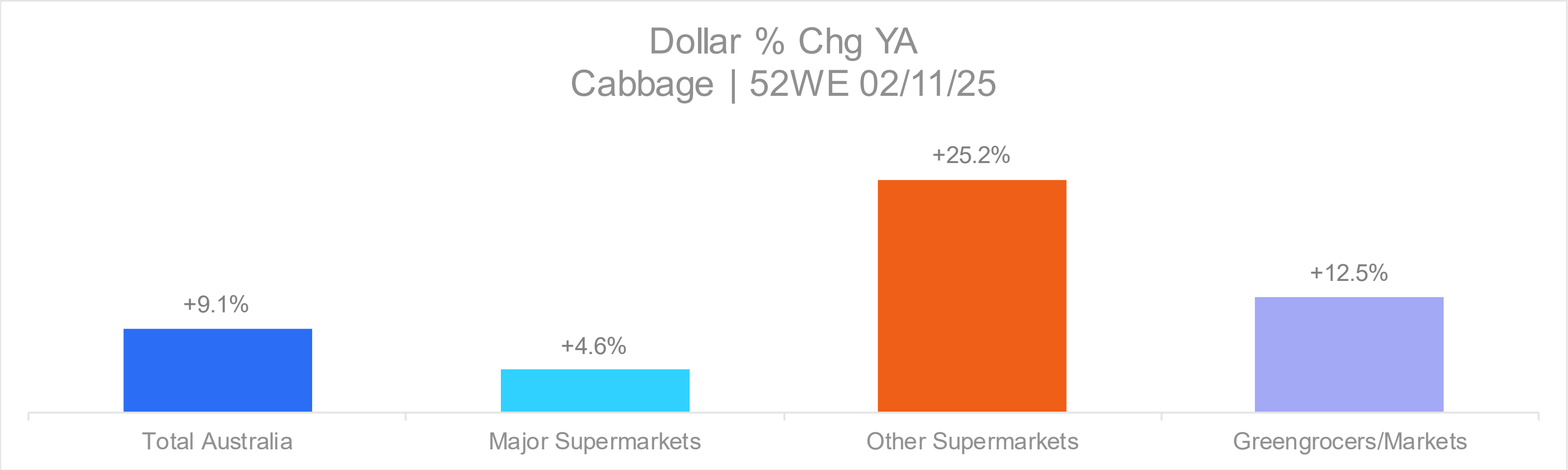


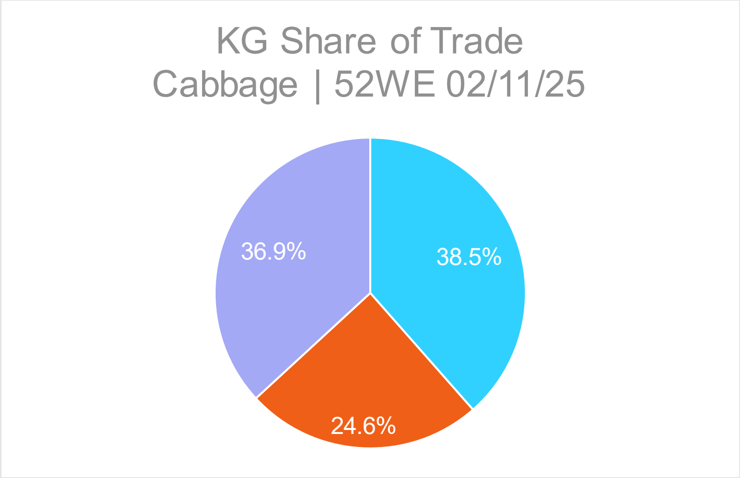


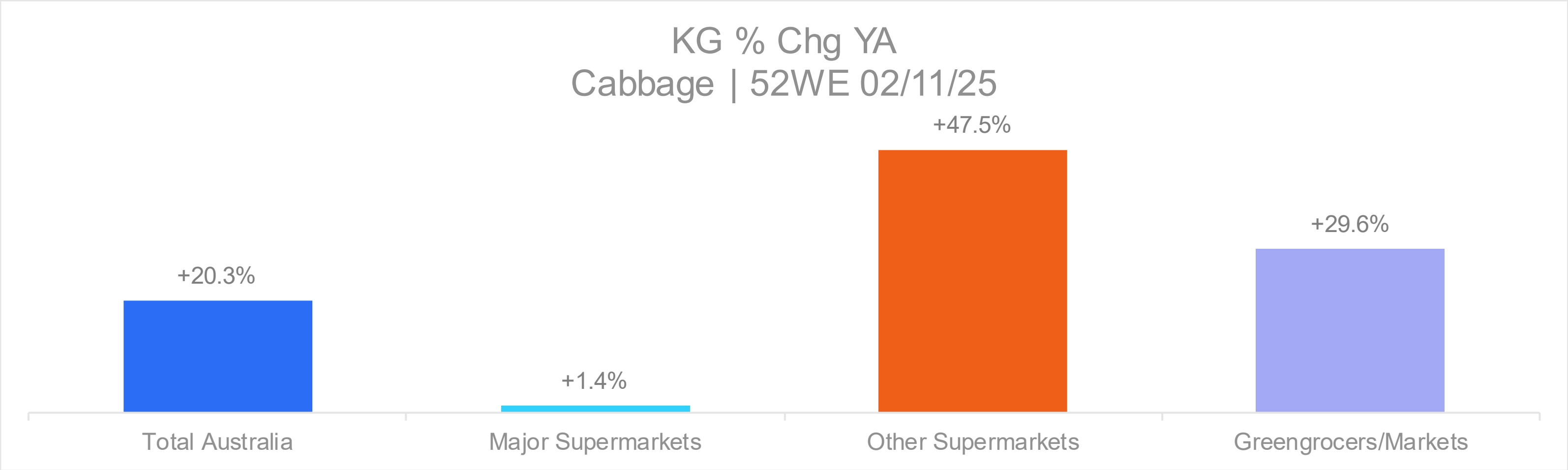
Source: NielsenIQ

All retail channels registered dollar sales and volume growth for cabbages this year however non major supermarkets results are the strongest.





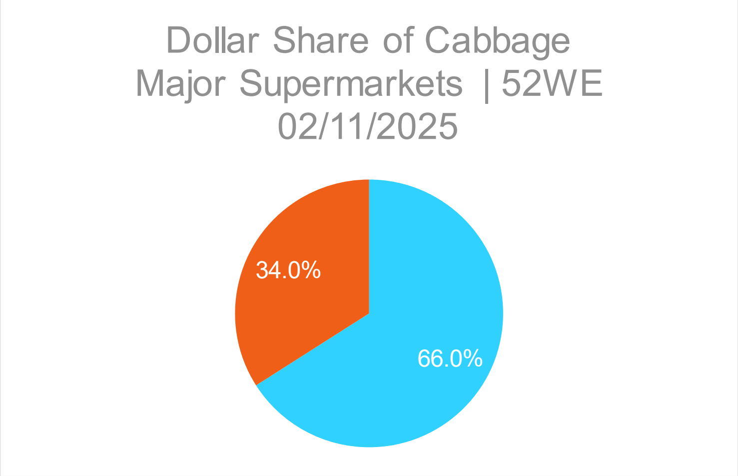


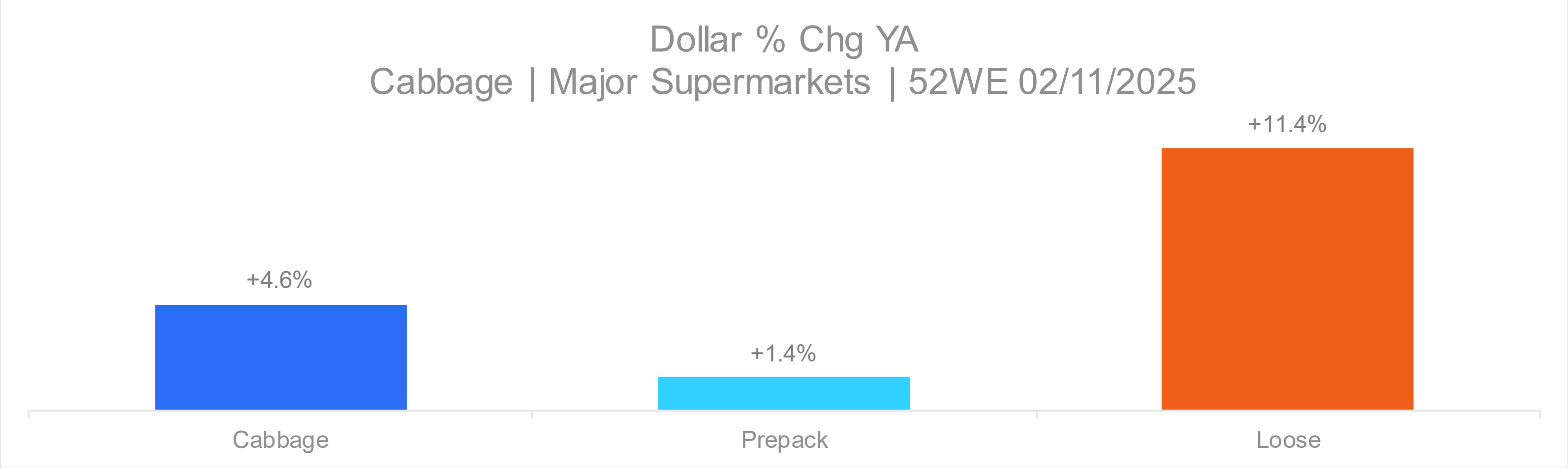


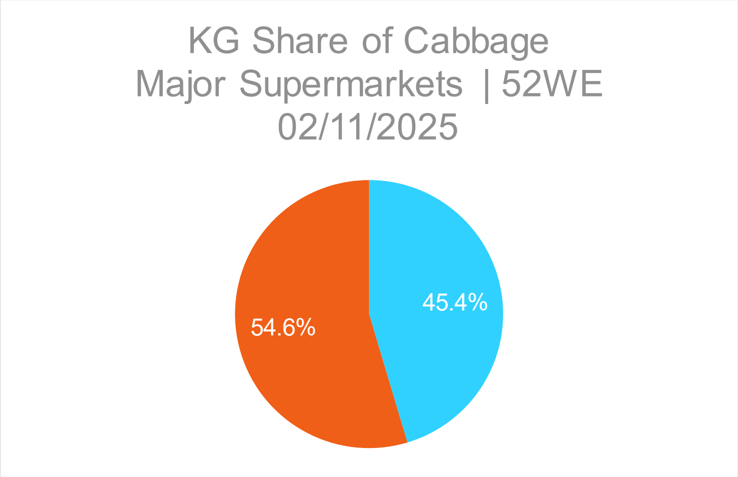
Source: NielsenIQ

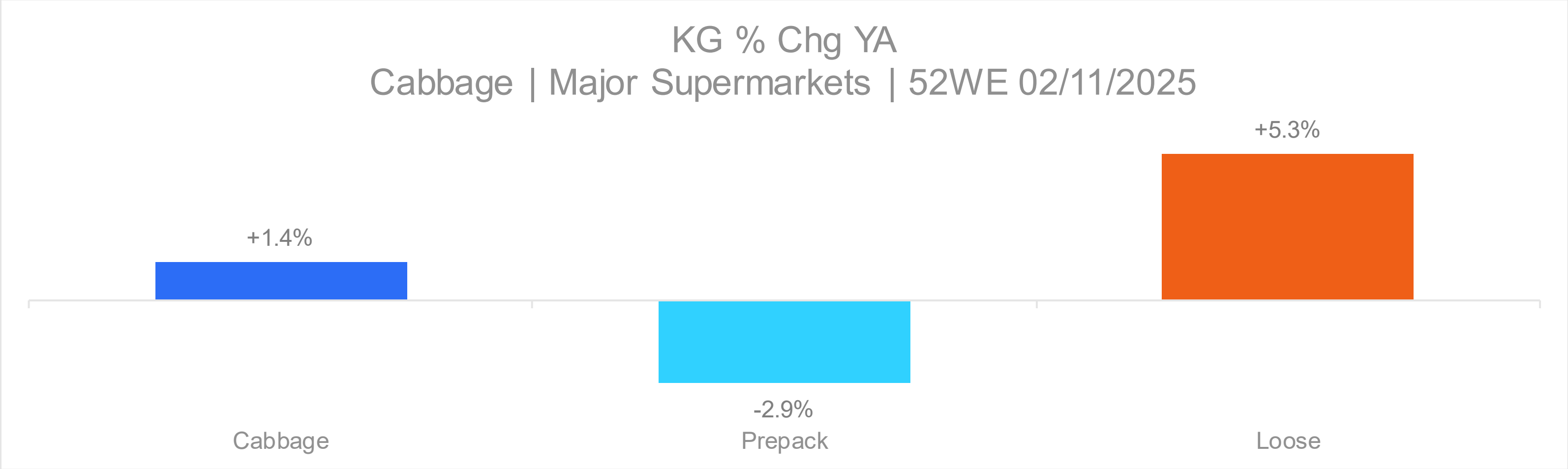
Prepacked versus loose cabbage

Across major supermarkets, a volume loss of -2.9% across the prepacked market dampened growth levels this year.



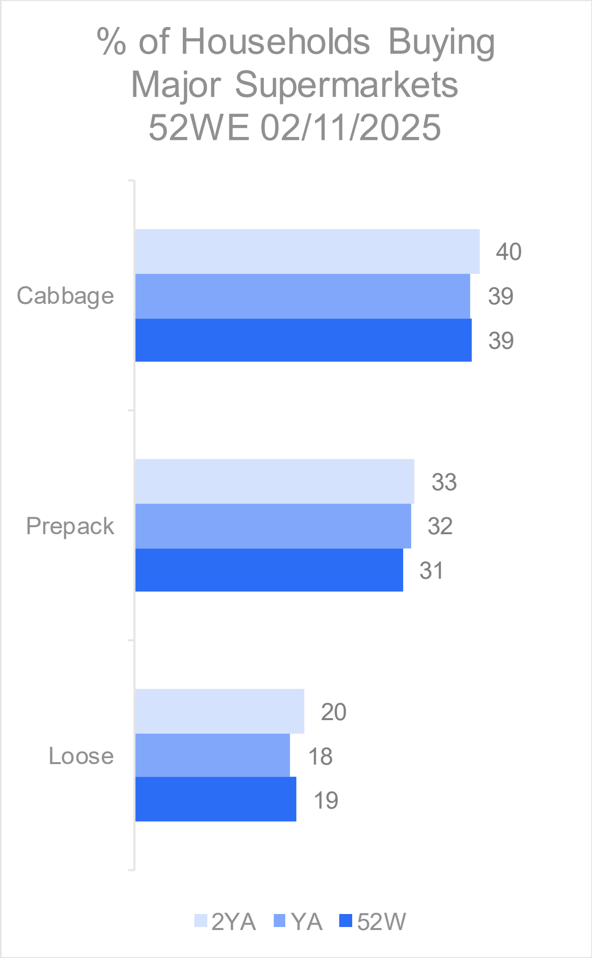


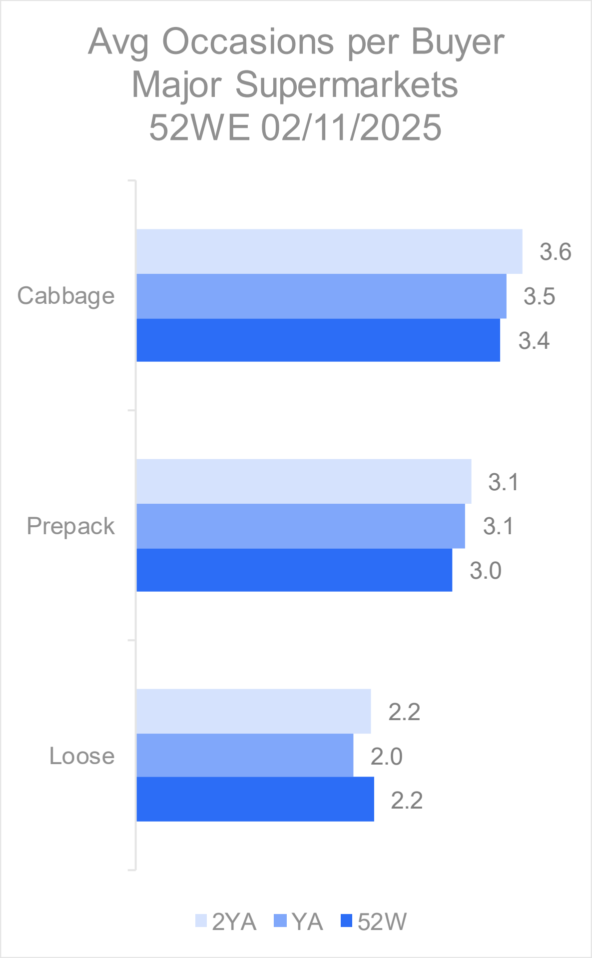


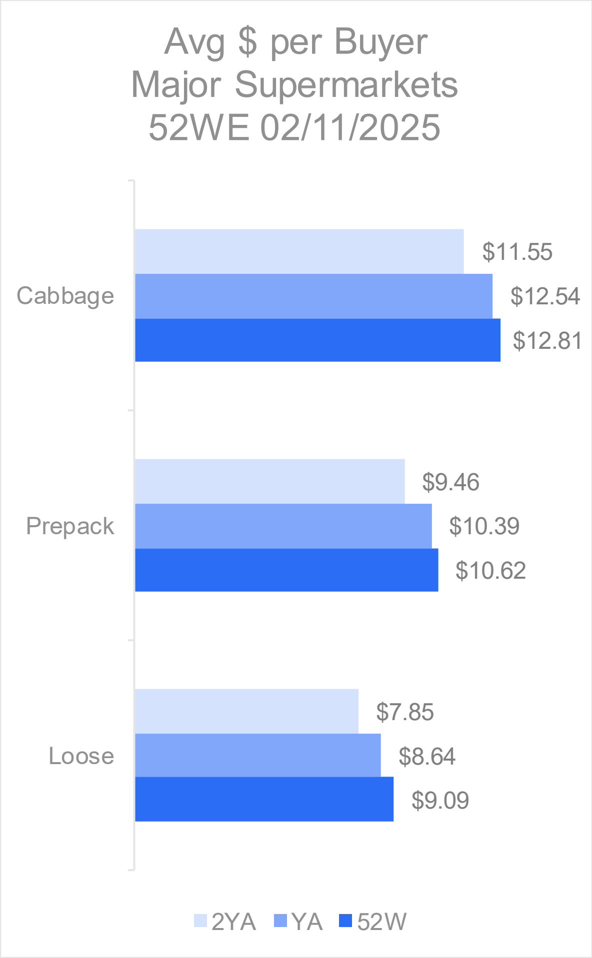


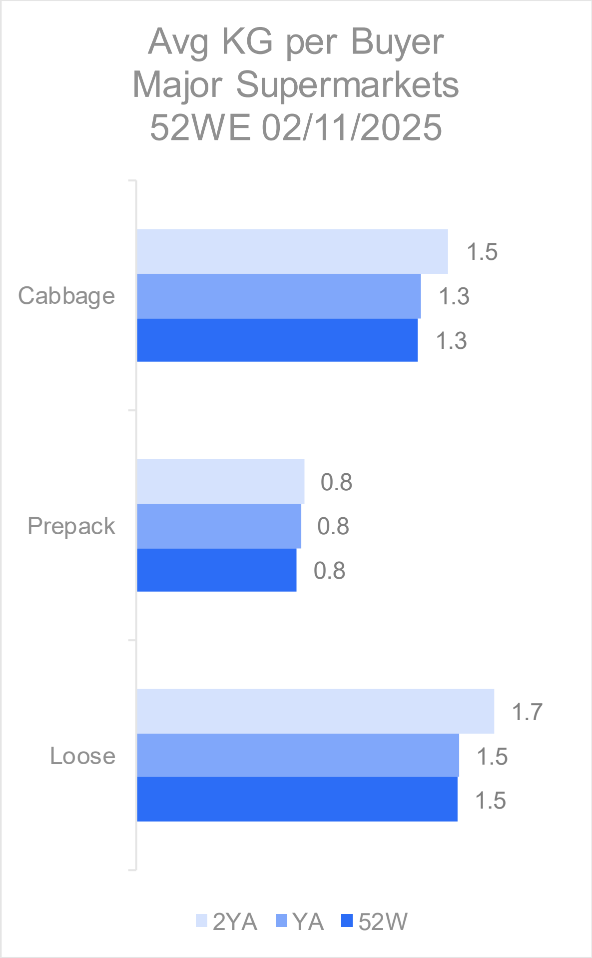
Source: NielsenIQ

Unlike the loose format where buyer numbers have grown, fewer households purchased prepacked cabbage this year, leading to volume losses.









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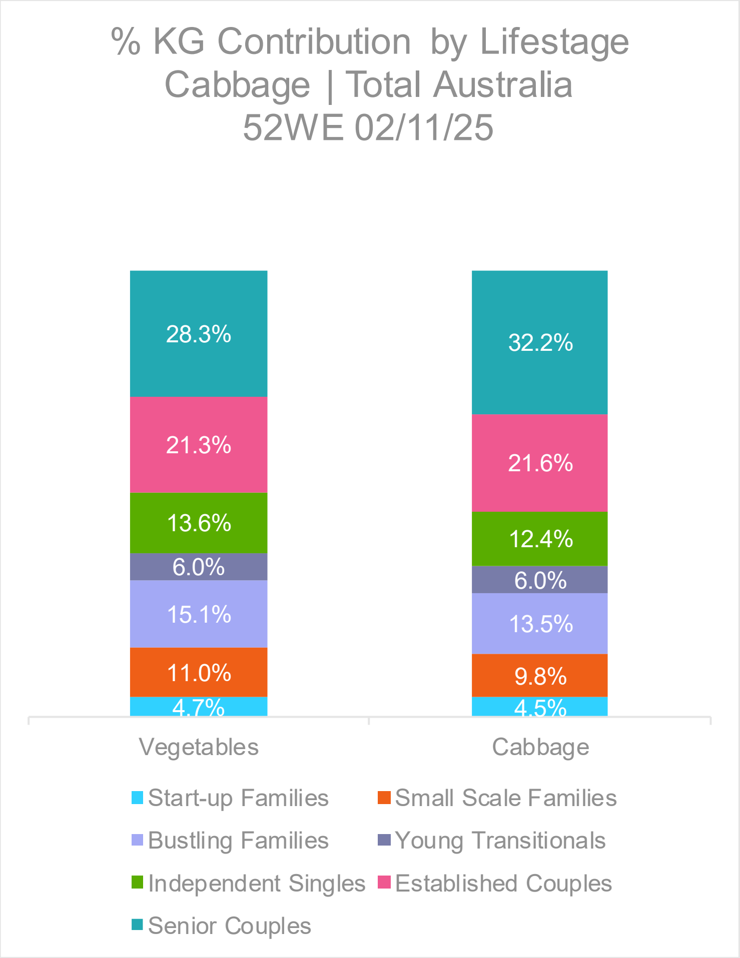
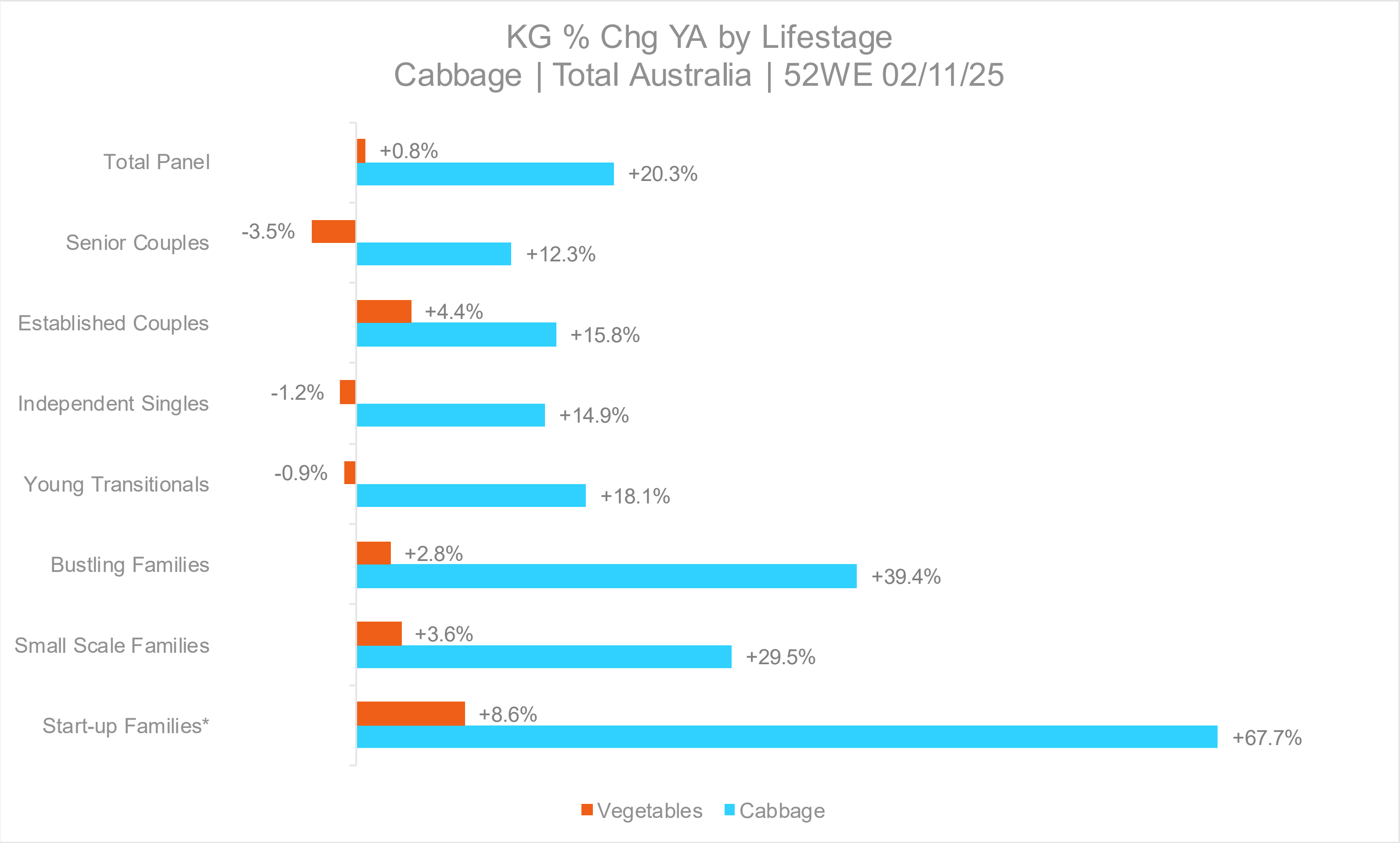
How did the different customer groups behave?

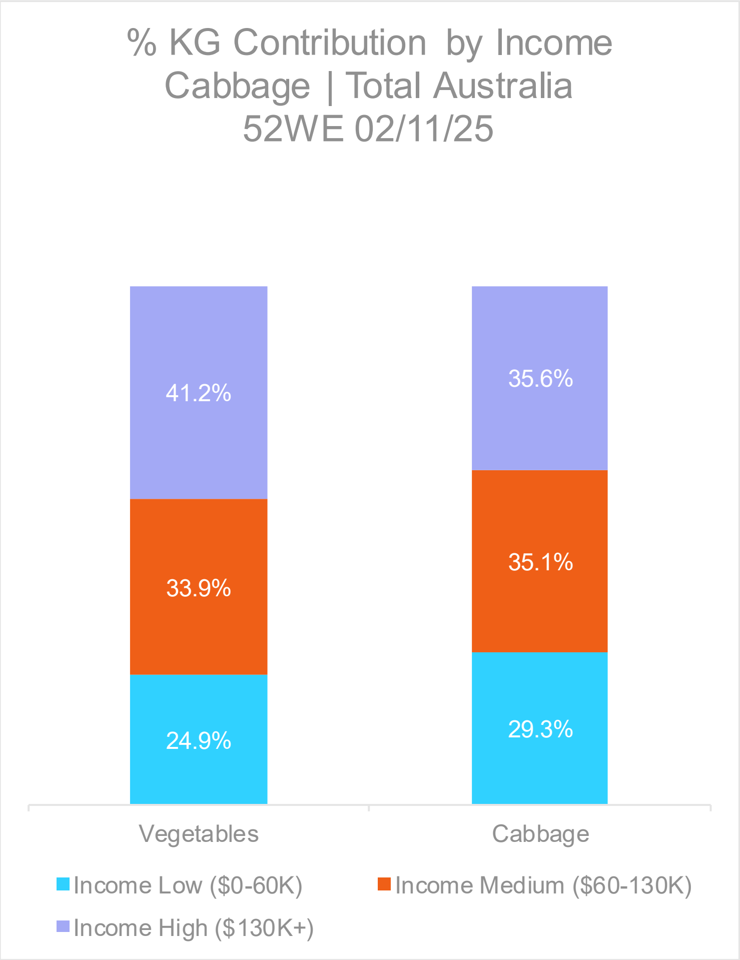
While cabbage volume growth is evident across all household types this year, results amongst families with children have been the strongest.

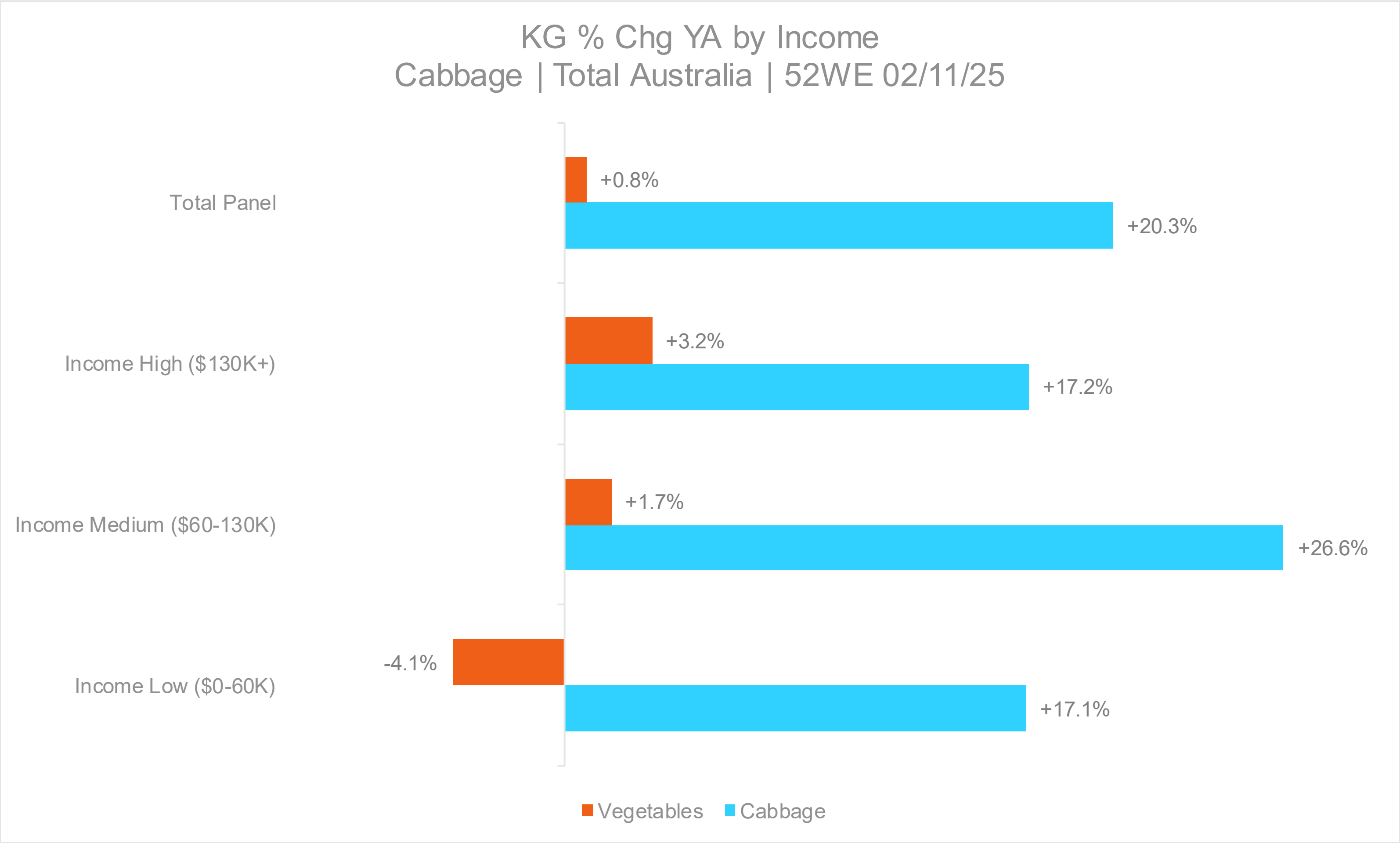




Source: NielsenIQ | * Low Sample Size, Do Not Use

Similarly, volume growth is evident across all income groups this year, with particularly strong results amongst medium income homes.





Source: NielsenIQ

Thank you