Fresh Salad Comprehensive Review 2025

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.

Use of this Report

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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.

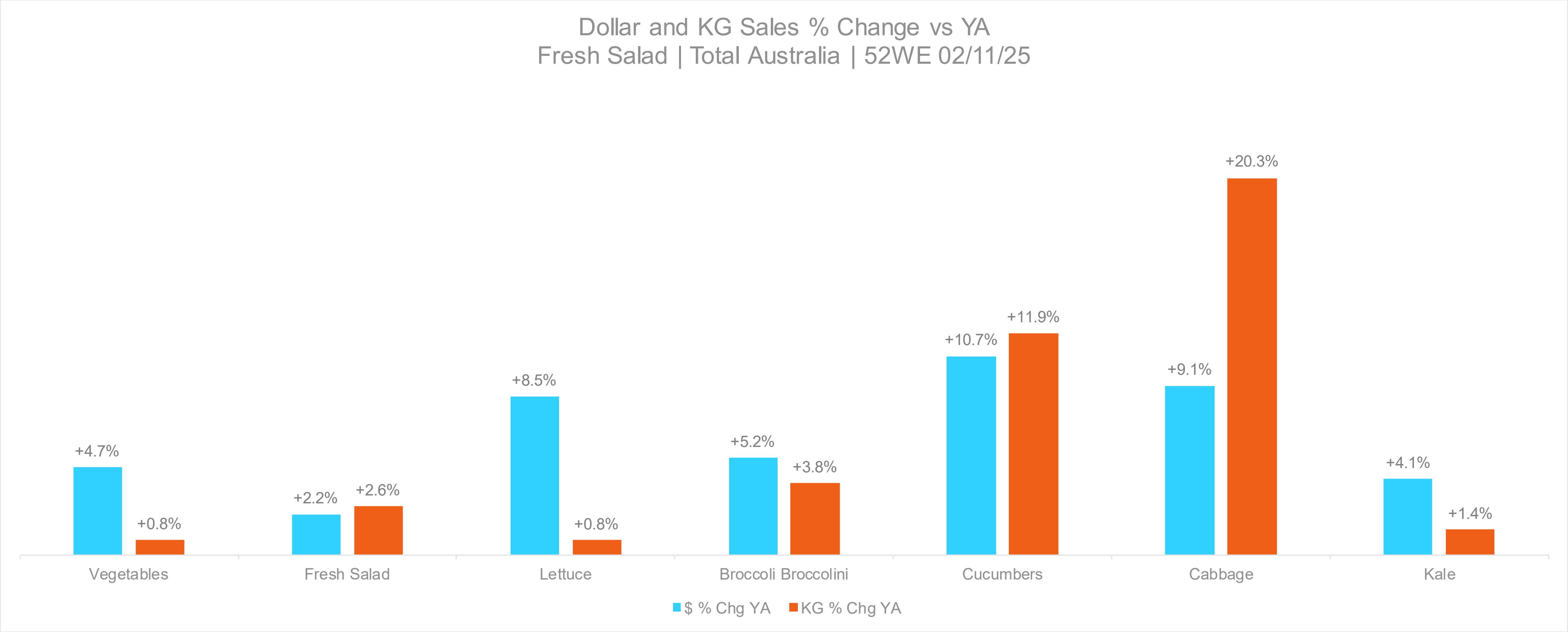
Performance Summary

- Fresh salad recorded dollar sales and volume growth of +2.2% and +2.6% respectively this year - while volumes are growing ahead of the fresh vegetable market average of +0.8%, these results are behind that observed for broccoli, cucumber and cabbage.
- Unlike the trend across total market, lettuce, broccoli and kale, where prices are ahead of last year, fresh salad average price per kilogram dropped by a modest –0.4% this year.
- Slightly more households purchased fresh salad this year, while purchase frequency levels trended down - relative to comparable vegetables however, fresh salad buyer and frequency numbers remain the highest.
- All retail channels posted dollar sales and volume growth this year however major supermarket results were not at pace with non-majors and specialty stores.
- Across major supermarkets, as the primary format, prepacked fresh salads are driving growth.
- With the exception of families with babies, fresh salad volume growth is evident across all household types this year.

How is fresh salad performing?

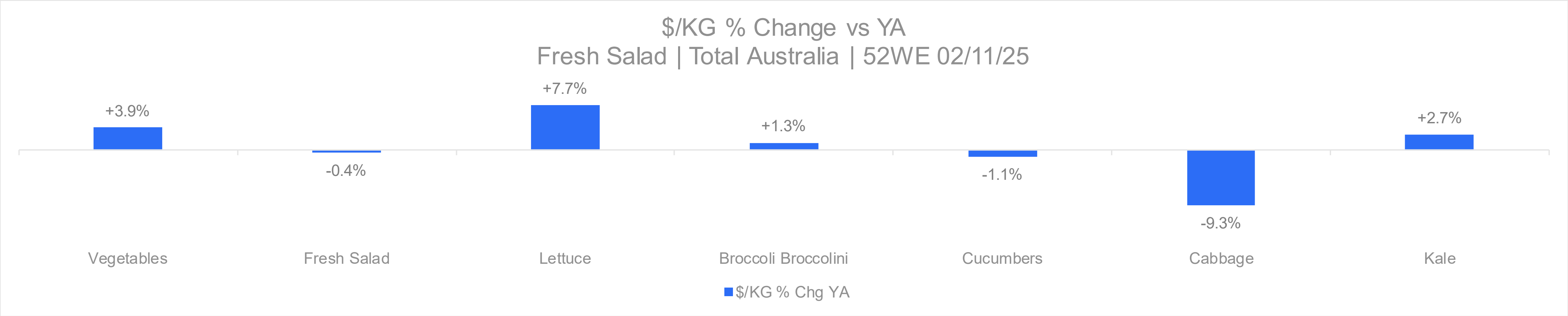
Fresh Salad registered dollar sales and retail volume growth of +2.2% and +2.6% respectively this year.

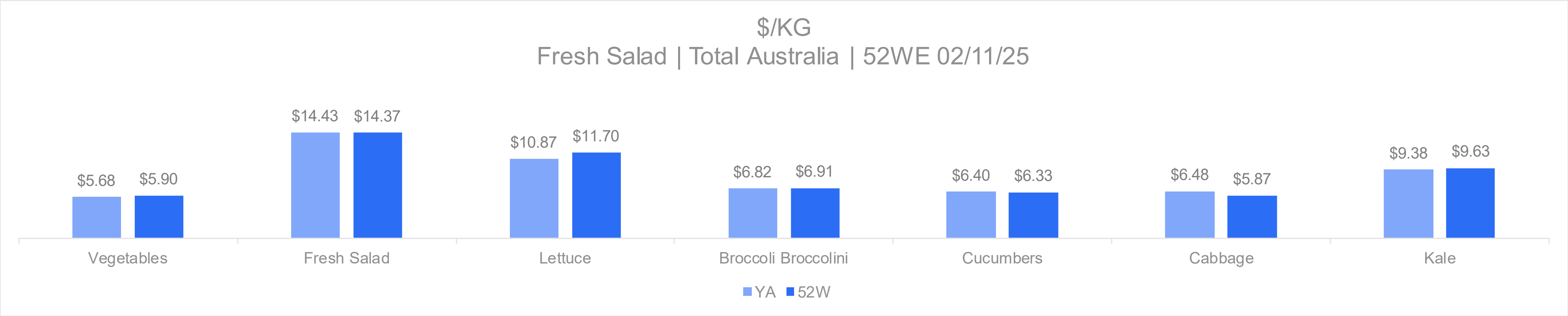
In comparison, broccoli, cucumber and cabbage registered stronger dollar sales and volume growth.



Source: NielsenIQ

Unlike the trend across total market, lettuce, broccoli and kale, where prices are ahead of last year, fresh salad average price per kilogram dropped by a modest –0.4% this year.

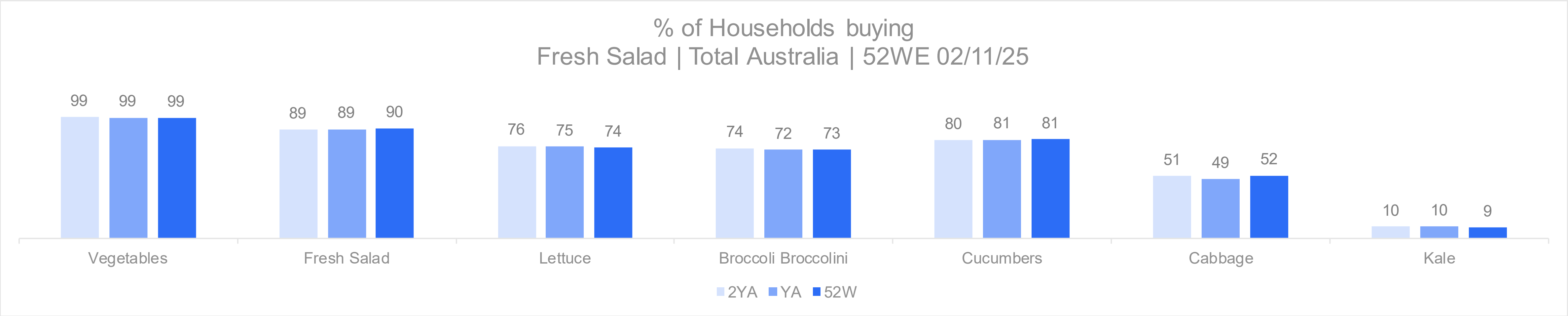


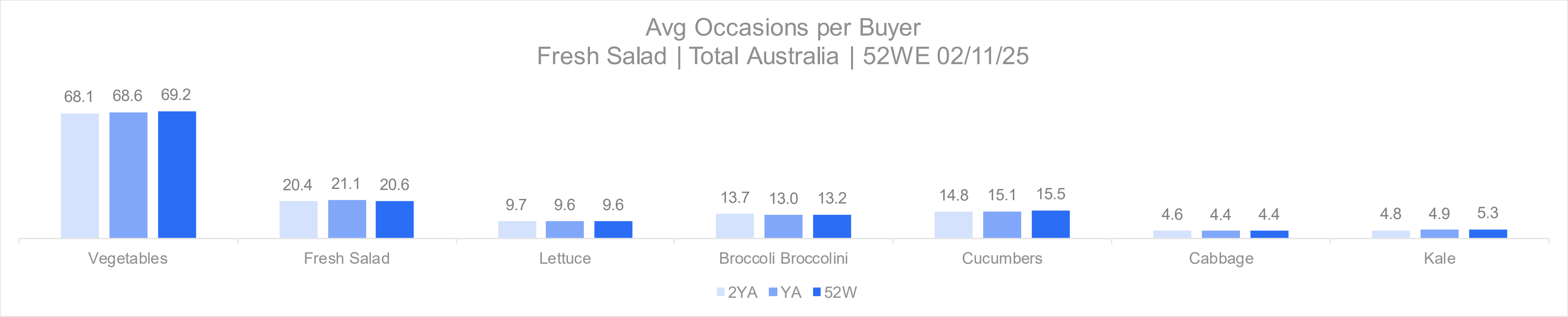


Source: NielsenIQ

Slightly more households purchased fresh salad this year, while purchase frequency levels trended down.

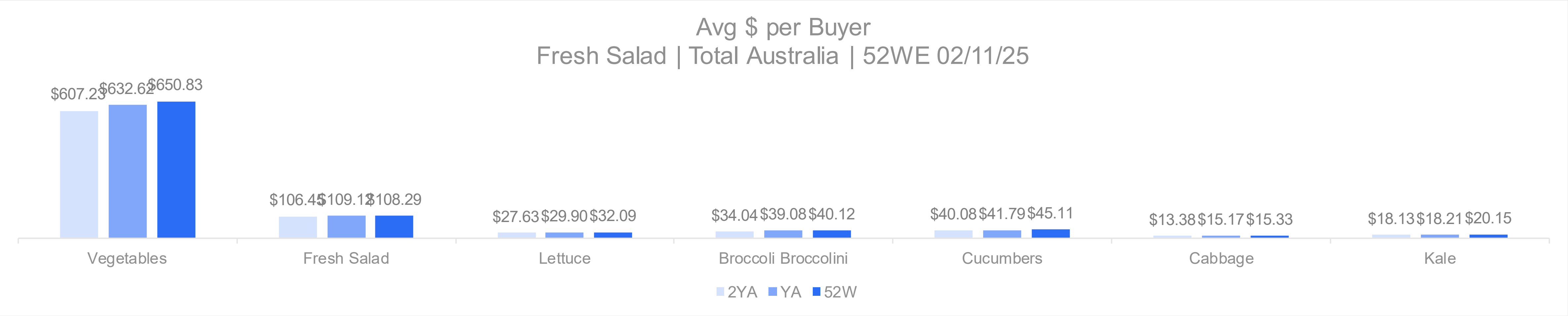
Relative to comparable vegetables, fresh salad buyer and frequency numbers remain the highest.

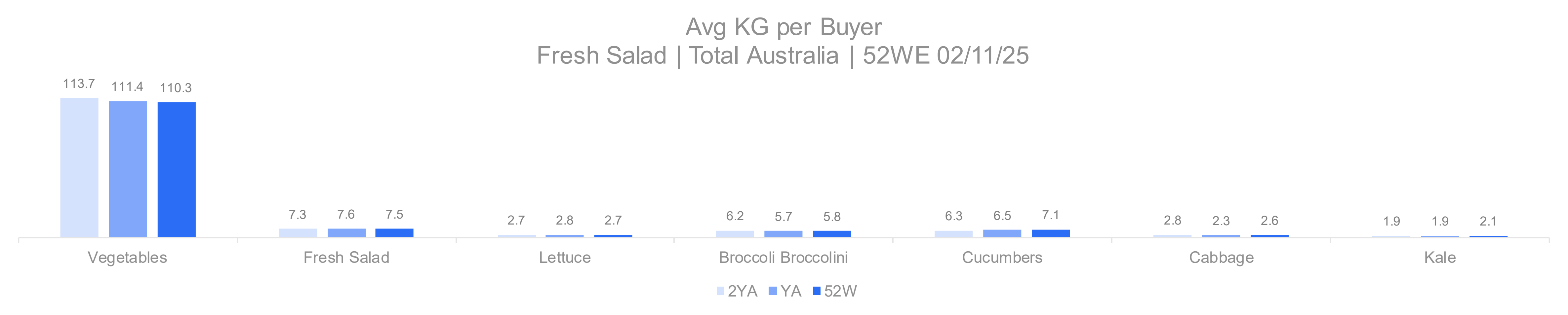




Source: NielsenIQ

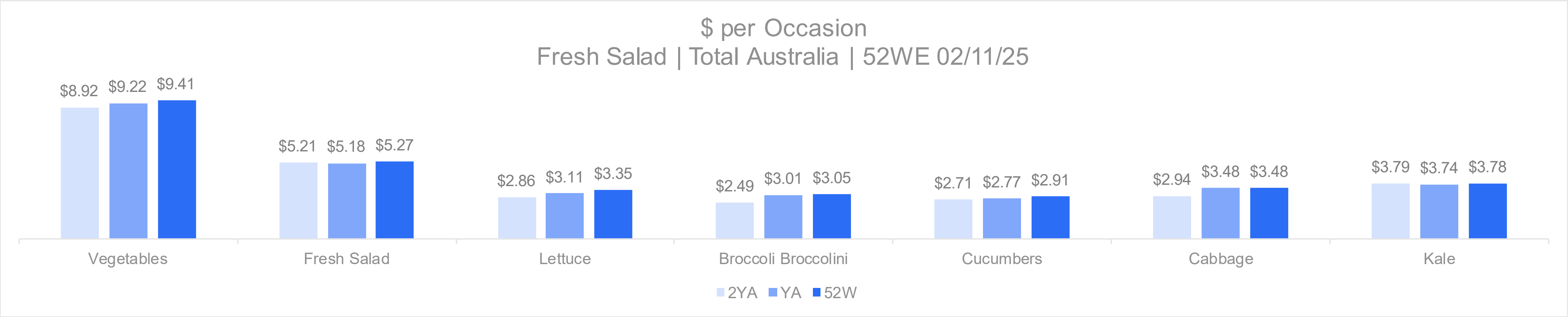
Both annual spend and purchase volumes trended down for fresh salad this year with the average household spending just over $108 and purchasing 7.5 kg.

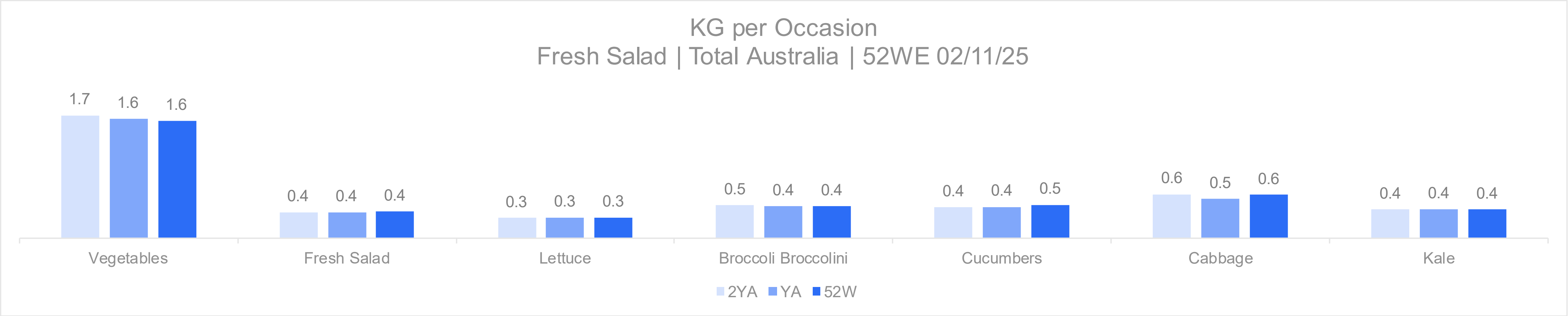




Source: NielsenIQ

Average purchase volume per occasion remains stable at approximately 400g.





Source: NielsenIQ

Which retailers are winning/losing?

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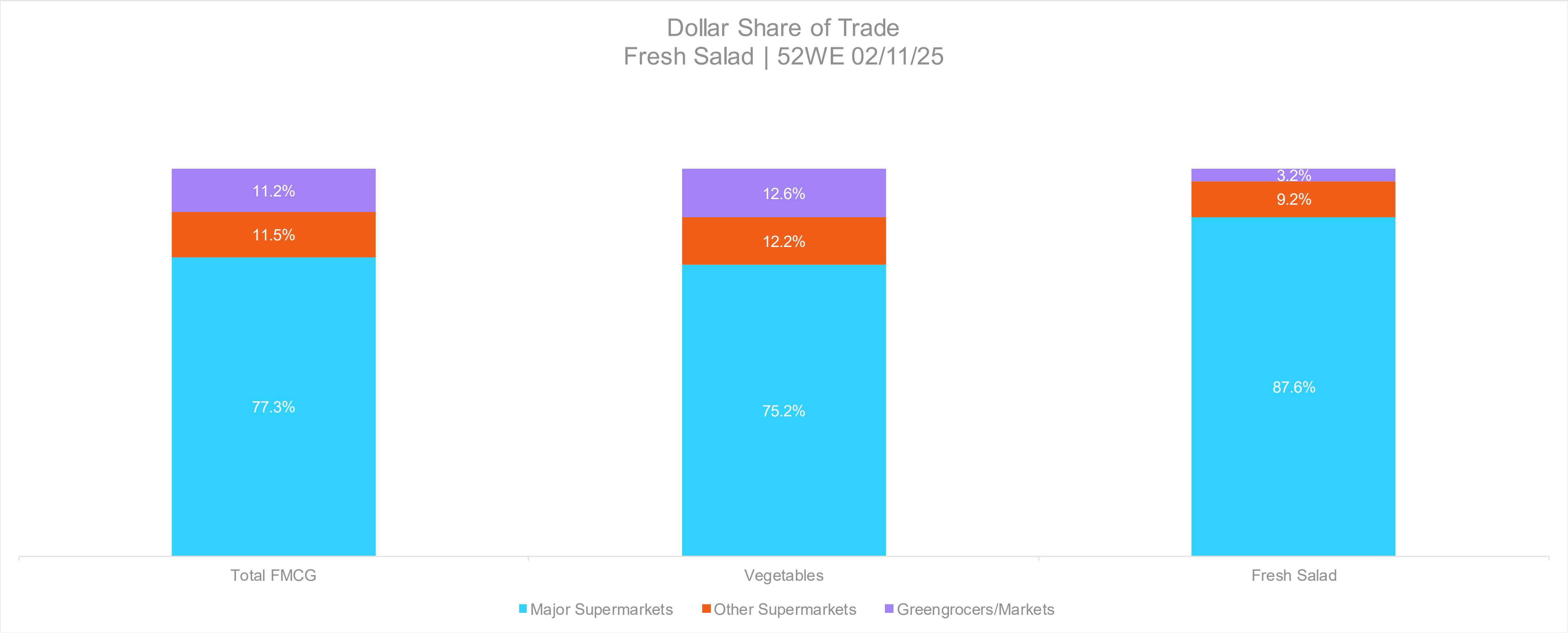
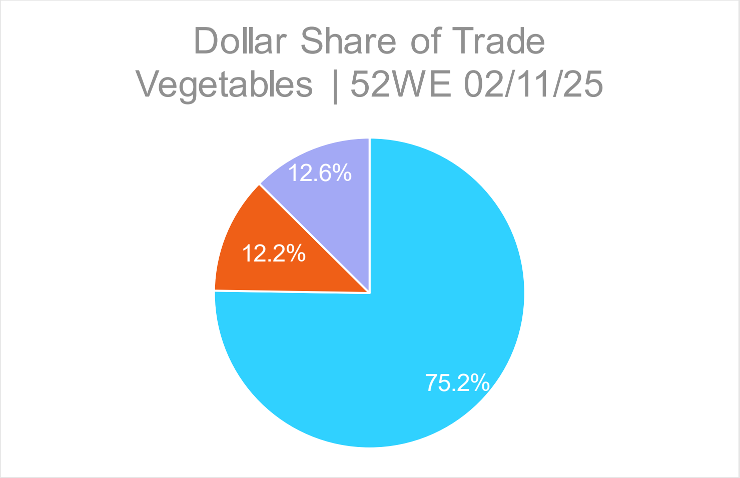
Major supermarkets overtrade in fresh salad sales in comparison to the fresh vegetables and FMCG markets.

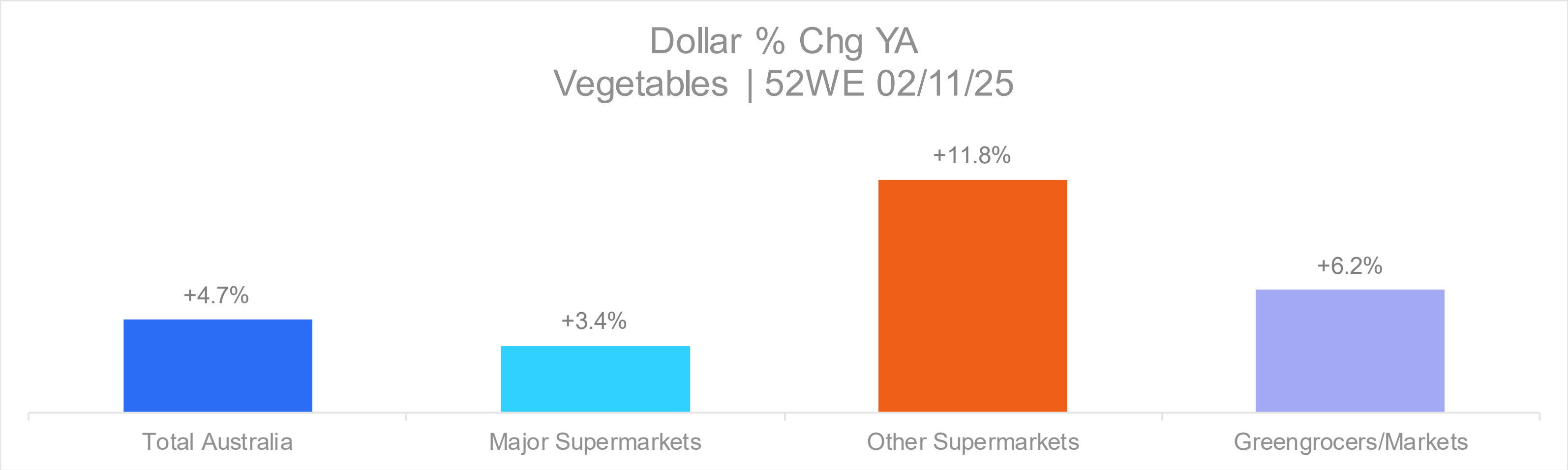


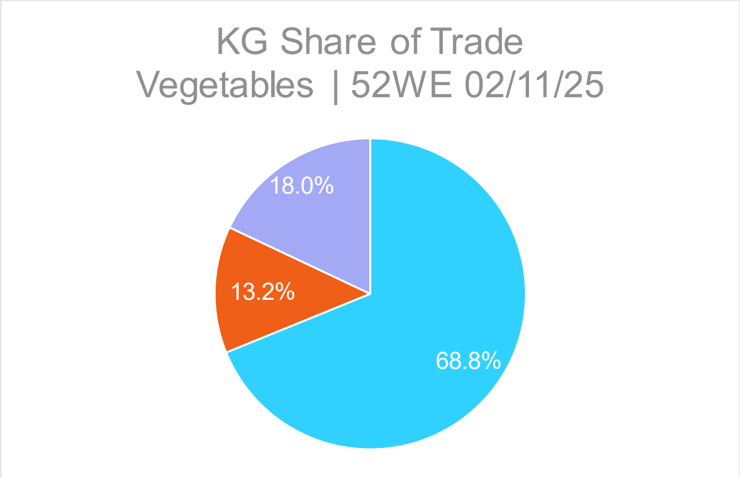
Source: NielsenIQ

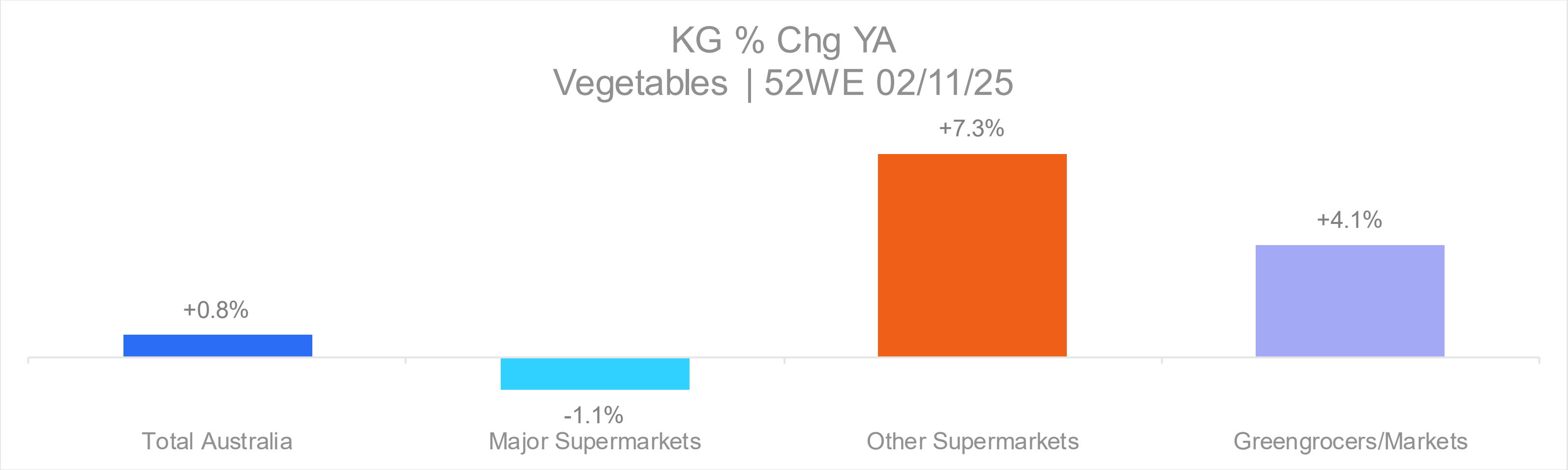
Non major supermarkets and greengrocers/markets are driving dollar sales and volume growth for fresh vegetables this year, outpacing the majors.

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



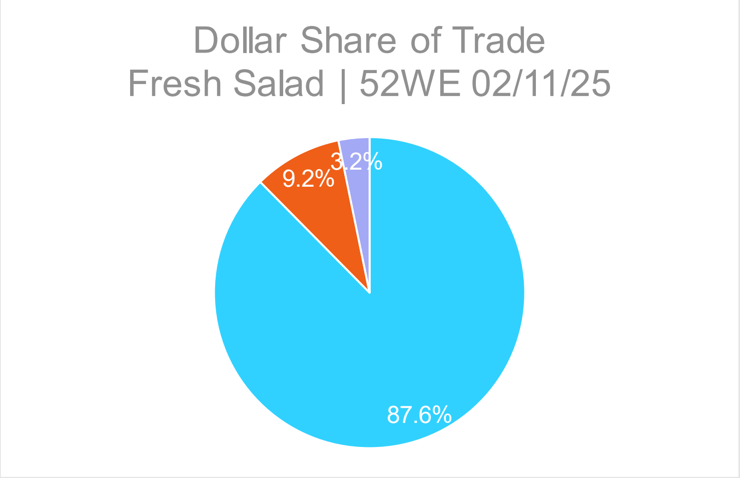


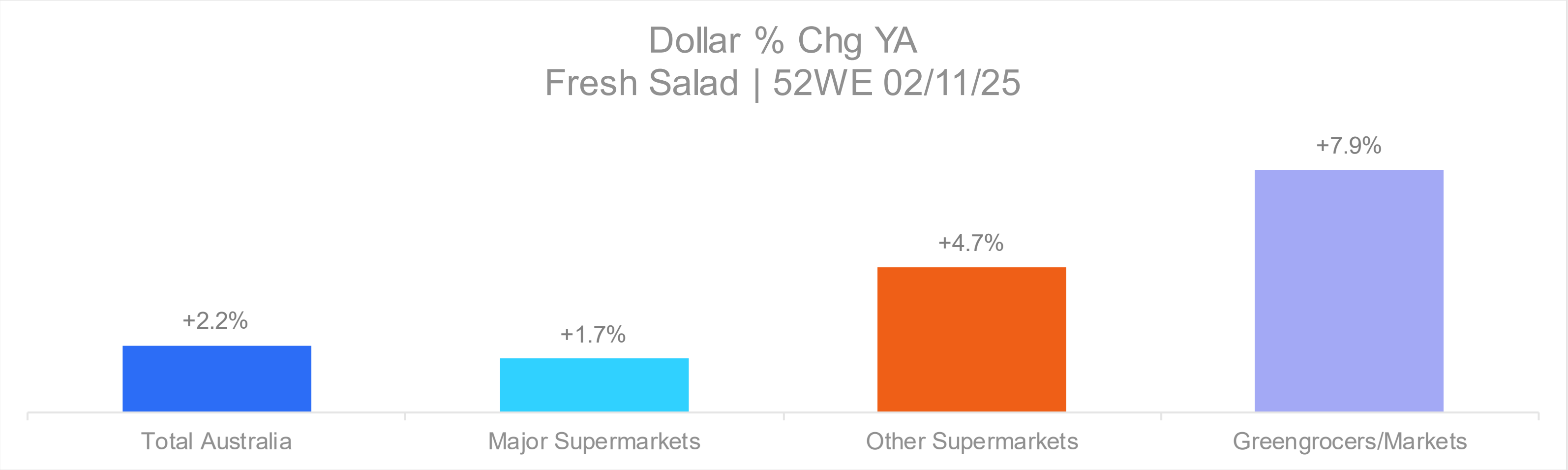


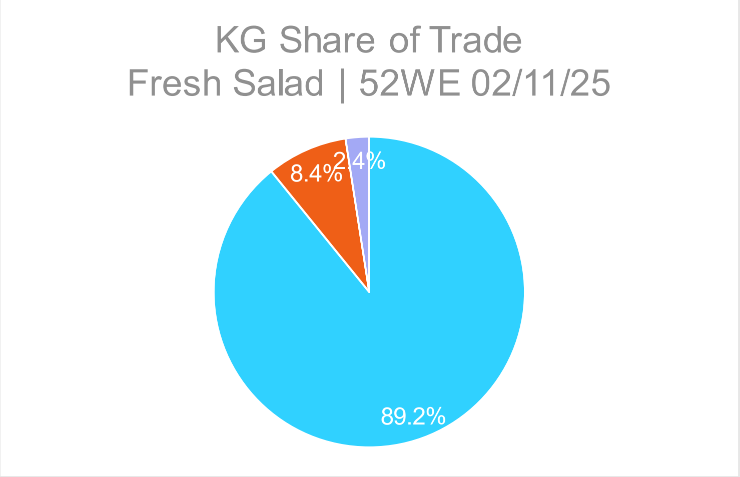


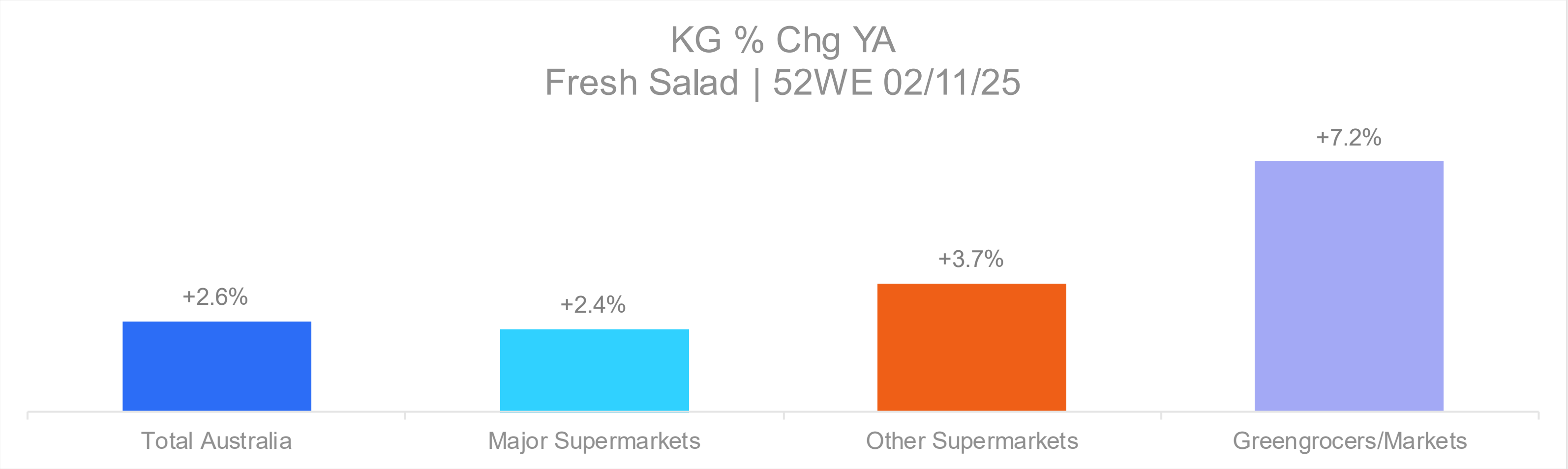
Source: NielsenIQ

While all retail channels registered fresh salad dollar sales and volume growth this year, major supermarket results are not at pace with other channels.





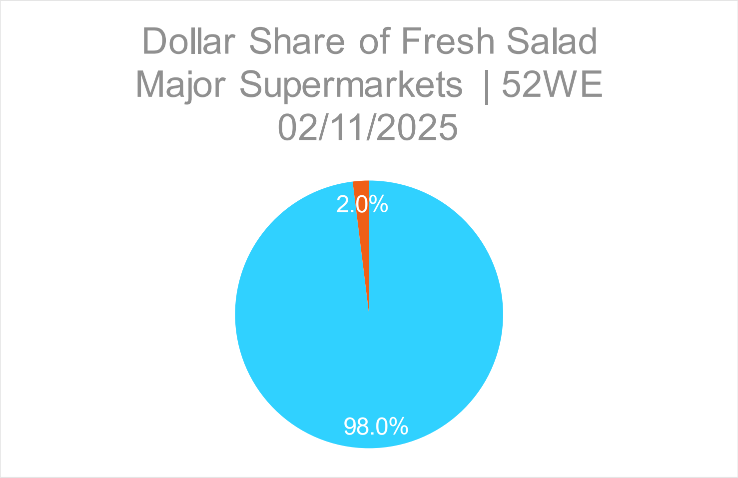


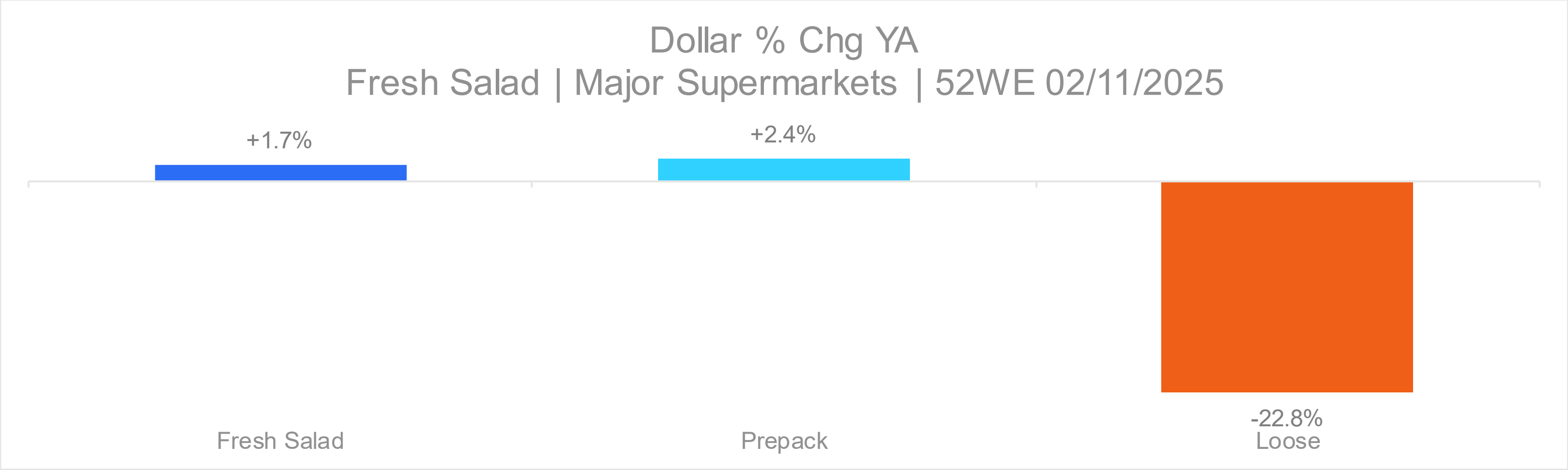


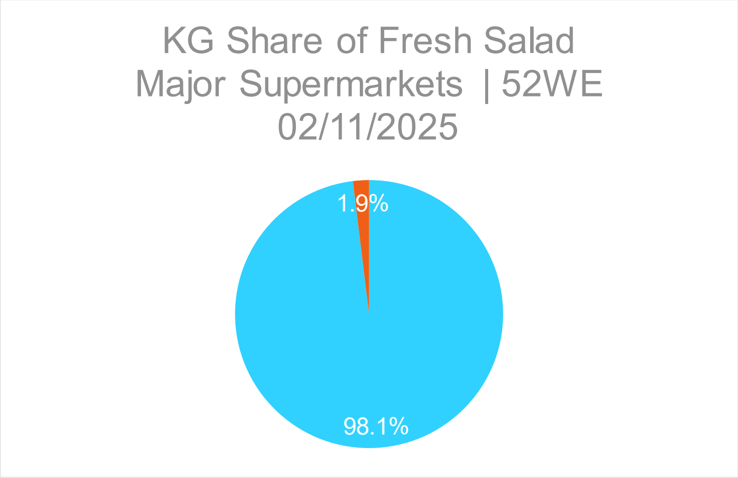
Source: NielsenIQ

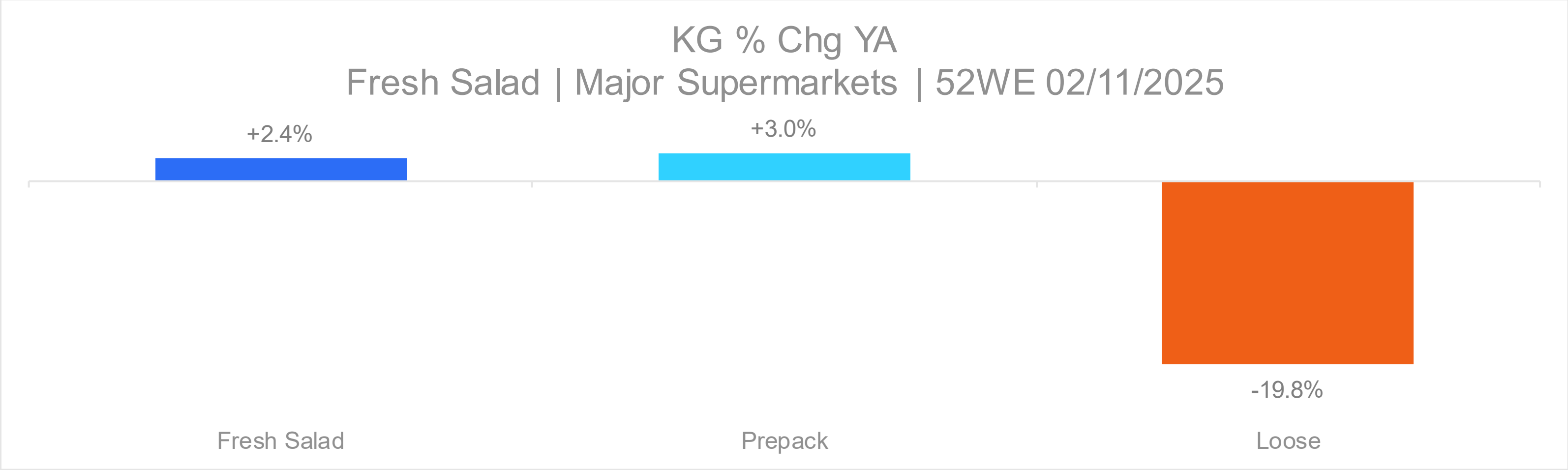
Prepacked versus loose fresh salad

As the primary format across major supermarkets, prepacked fresh salads are growing this year, against a declining loose market.



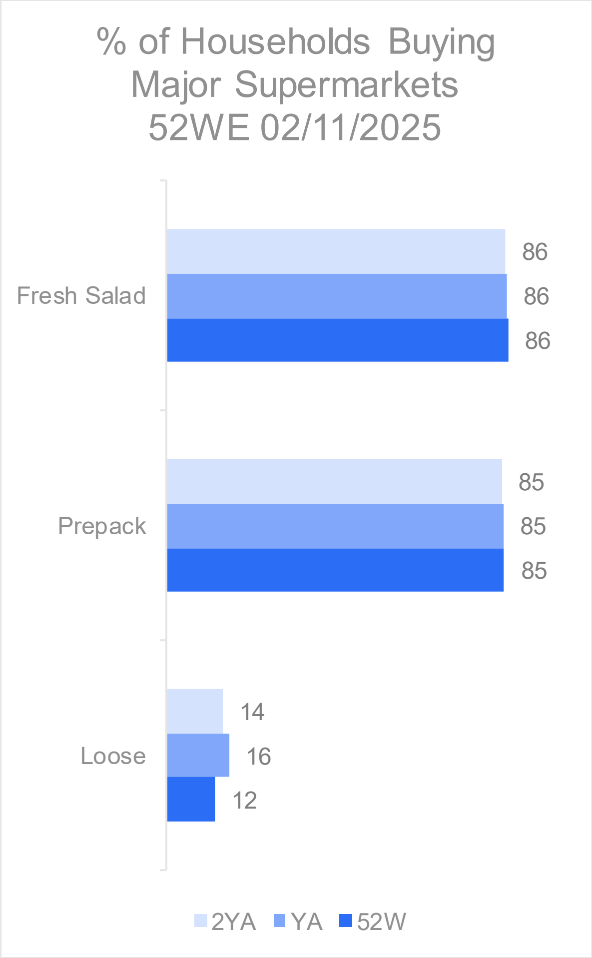


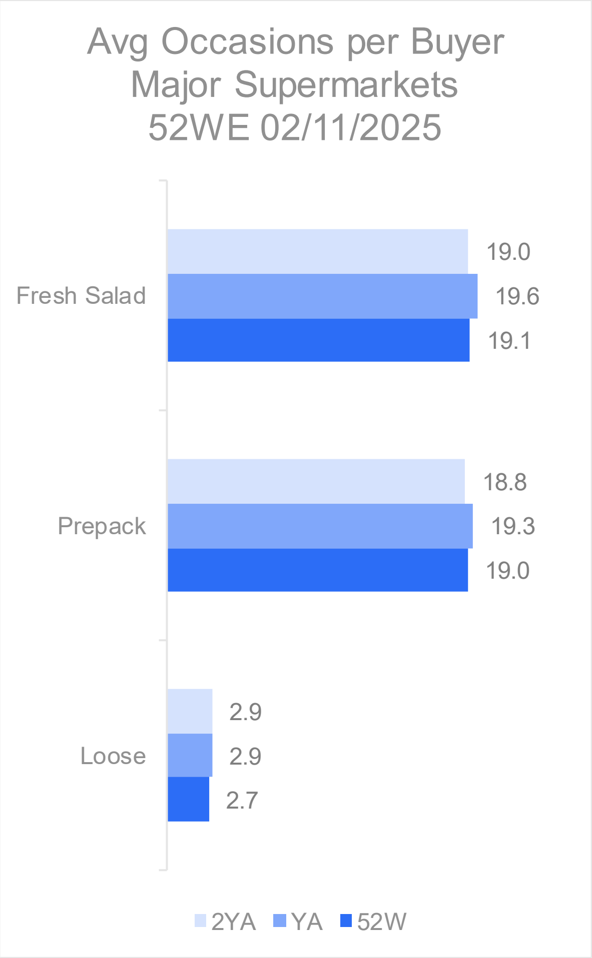


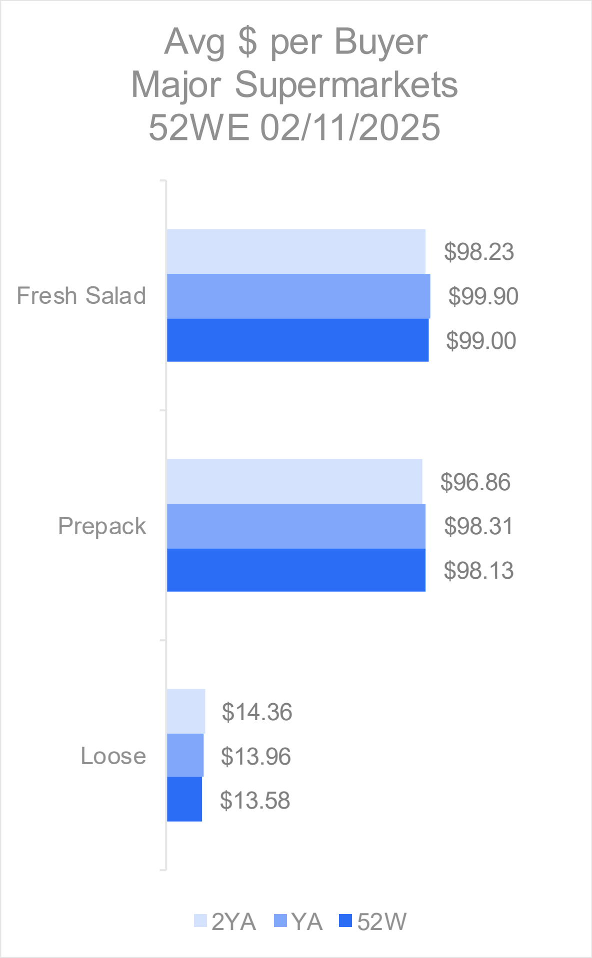


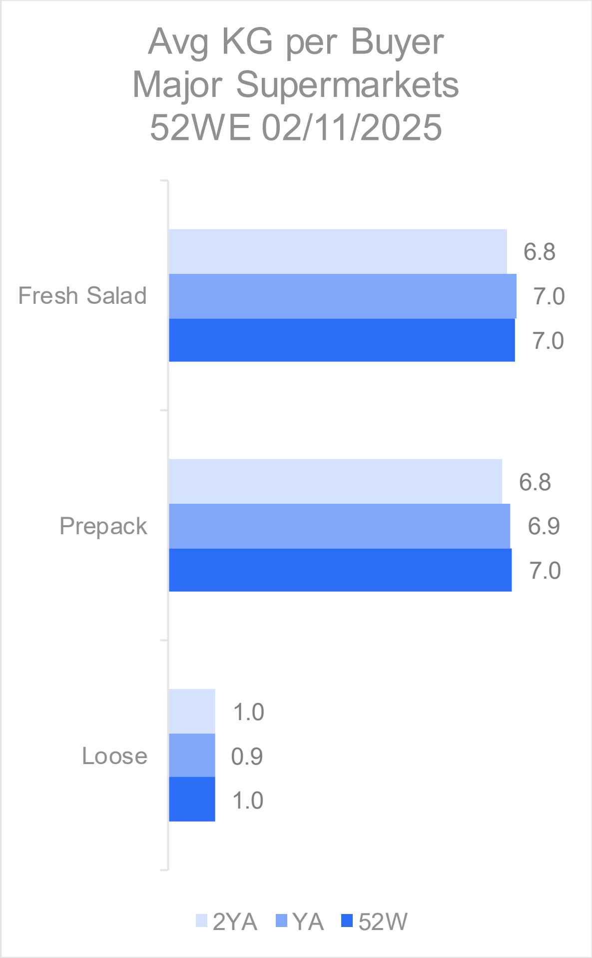
Source: NielsenIQ

The loose format reaches fewer households and these numbers have dropped in the last year.



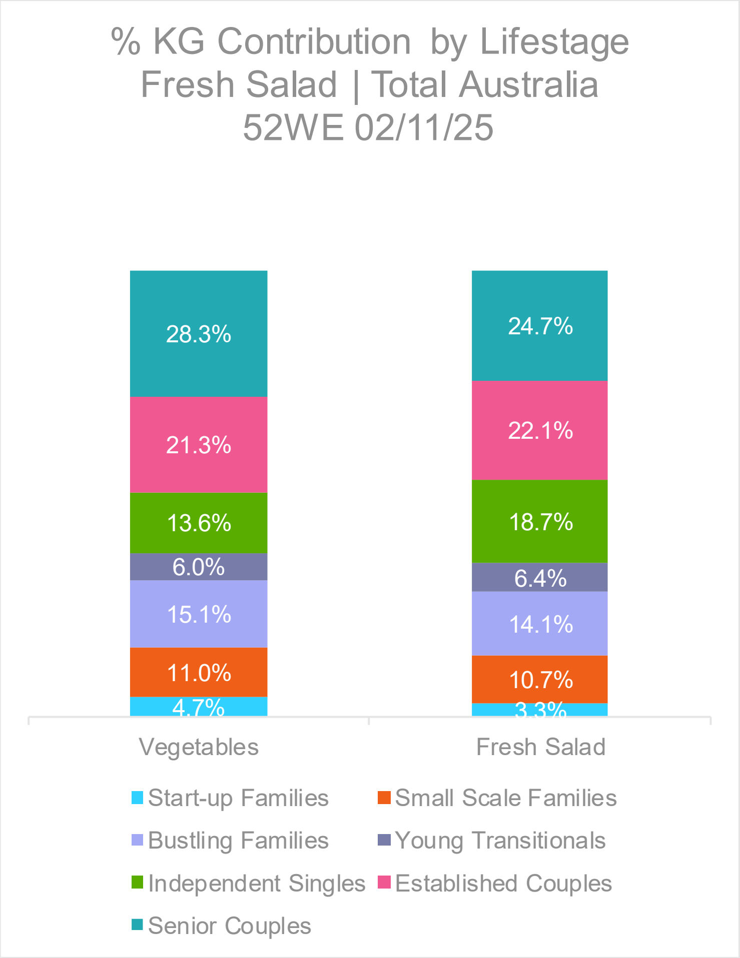


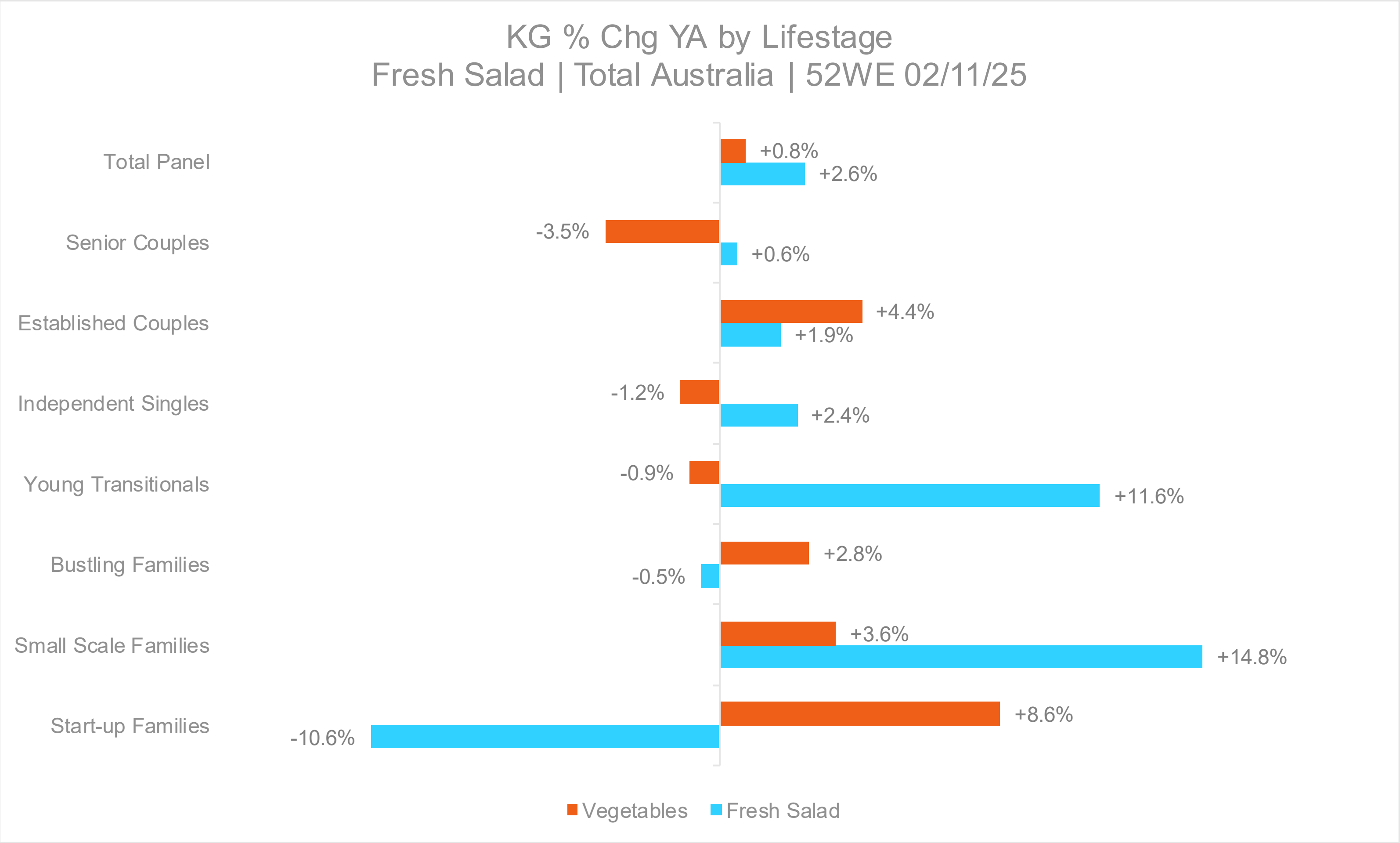




How did the different customer groups behave?

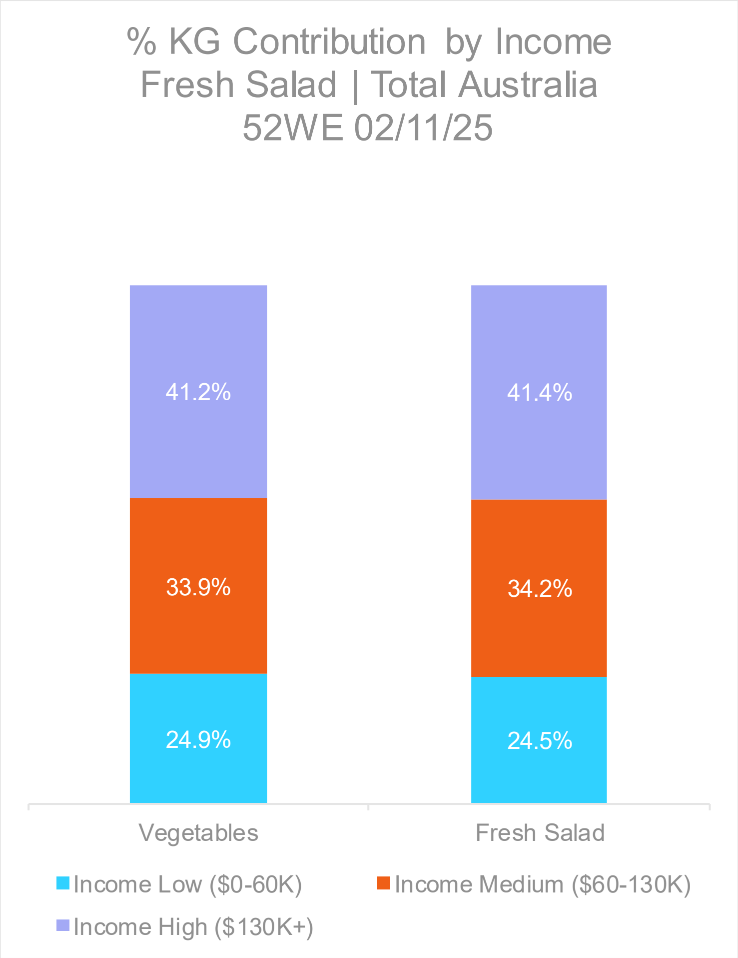
With the exception of families with babies, fresh salad volume growth is evident across all household types this year.

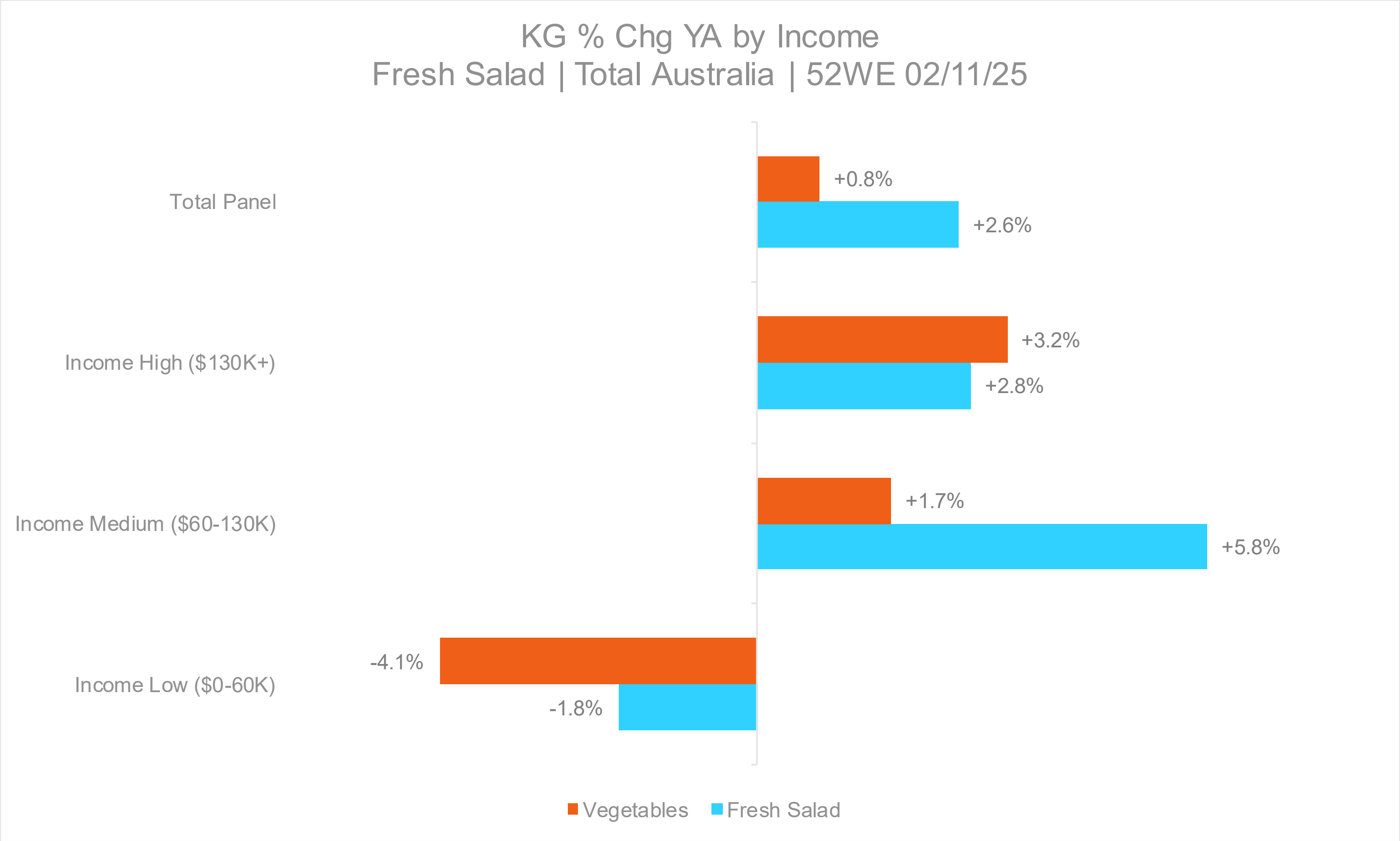




Source: NielsenIQ | * Low Sample Size, Do Not Use

In terms of income, fresh salad volume growth was dampened by losses amongst low income households this year.





Source: NielsenIQ

Thank you