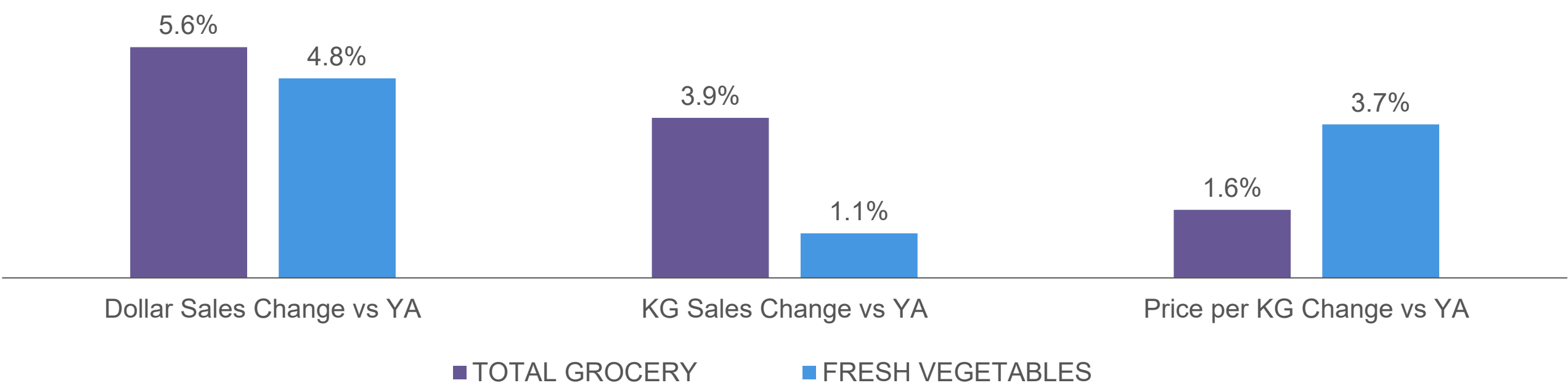


Fresh Vegetables: A Full Year in Review - 2025



Sales Performance (52 w/e 28/12/25 vs YA)



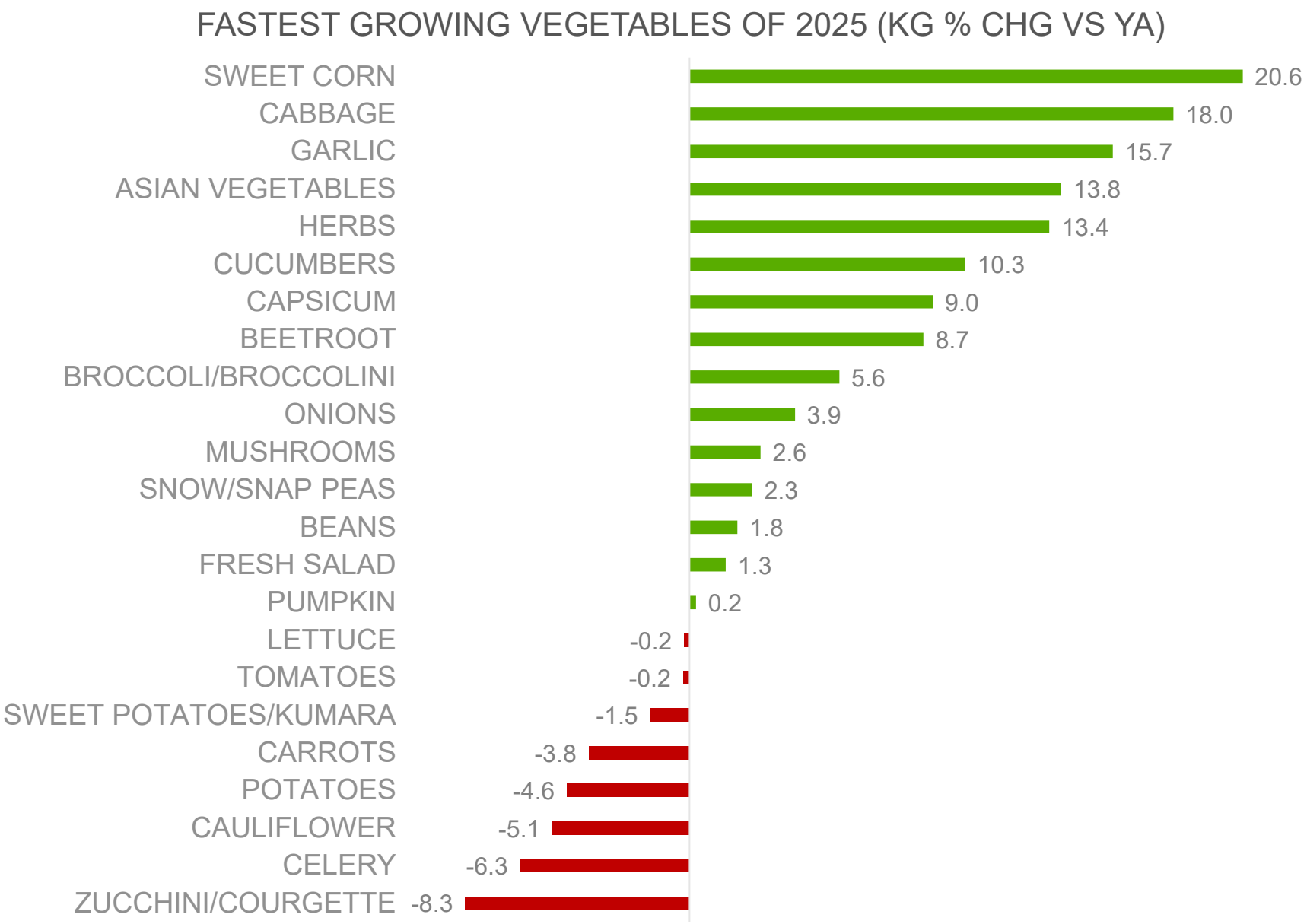
What is Driving Fresh Vegetable Growth?

- Over the full 2025-year, fresh vegetables continue to play a crucial role in driving Australian Fast Moving Consumer Goods (FMCG) market dollar sales growth. The category currently ranks second in dollar sales, just trailing fresh meat in first.
- Average fresh vegetable prices remain higher than the grocery average, (+3.7% increase in average price per kilogram compared to a year ago), driving dollar sales growth of +4.8%, whilst volume growth has been more modest at +1.1%.
- Household purchasing behaviour continues to evolve, with shoppers buying fresh vegetables more frequently, but leaving stores with smaller baskets, contributing to an annual decline in fresh vegetable purchases per household (110 kilograms, down from 111kg compared to the same period year prior).
- Shoppers are also adjusting how and where they buy fresh vegetables this year, with value-seeking behaviour supporting a shift toward non-major supermarkets and online channels. While volume sales remained unchanged year on year for major-supermarkets, non-major supermarkets recorded growth of +6.1% and online growing by +7.0% for fresh vegetables.

*Major Supermarkets: Woolworths, Coles & Aldi
*Non-major Supermarkets: Costco, IGA and Small Asian Grocers.

Top Performing Fresh Vegetables in 2025 (52 w/e 28/12/25 vs YA)

| MOST POPULAR VEGETABLES | KG SHARE % |
|--------------------------|------------|
| 1.POTATOES | 19.6% |
| 2. CARROTS | 10.4% |
| 3. ONIONS | 9.7% |
| 4. TOMATOES | 8.8% |
| 5. FRESH SALAD | 6.2% |
| 6. CUCUMBERS | 5.3% |
| 7. PUMPKIN | 4.8% |
| 8. SWEET POTATOES/KUMARA | 4.8% |
| 9. BROCCOLI/BROCCOLINI | 3.9% |
| 10. CAPSICUM | 3.1% |



Fresh Vegetable Trends in 2025

- Sweetcorn and cabbage are among the fastest growing vegetables this year, with growth largely driven by Asian ethnic communities. As Asian cultural influence continues to grow, embedding fresh vegetable categories within creative and culturally diverse recipe dishes will inspire audiences and drive engagement within the category.
- Meanwhile, viral trends such as the TikTok ‘cucumber salad’ phenomenon helped boost cucumber sales and sparked heightened interest amongst shoppers, particularly younger demographic groups (e.g., cucumber volume growth for adults aged under <35, outpaced total market growth at +12.1% compared to year prior).
- Convenience also continues to gain momentum, fueled by time poor consumers seeking ease, speed and reduced effort in meal preparation. While prepacked salad remains a staple in Australian households delivering modest volume growth of +1.6%, prepacked broccolini, capsicum and celery recorded double digit volume growth, outperforming the total market, driven by lower prices and buyer growth.
- And finally, snacking occasions are increasingly incorporating fresh vegetables, particularly when paired with high-protein accompaniments such as hummus, Greek yogurt and cottage cheese. Snacking vegetables account for 3% of total fresh vegetable kilograms sold across the retail market, with three in four Australian households purchasing snacking vegetables at least once per year, at an average purchase frequency of once per month. Although snacking tomatoes represent more than half of this market, baby cucumbers and baby carrots are among the fastest growing vegetables in 2025, delivering volume growth of +19.6% and +15.1% respectively.

*Total snacking vegetables = snacking carrots + snacking cucumbers + snacking tomatoes

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Data shown is full year of 2025 (52 weeks ending 28 December 2025)

Consumer behavioral data program (MT21004) - This multi-industry investment provided by NIQ, the world's leading consumer intelligence company, is tasked with providing regular consumer behavior data and insight reporting to a range of horticulture industries, through the Hort IQ platform (www.hortiq.com.au). The information is intended to assist growers and supply chain partners in decision-making for their businesses, and, for the wider industry, the data and insights will be available to support strategic activities.

Funding statement

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Reporting Period

52 weeks ending December 28, 2025, compared with the same period one year ago.

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