# Lettuce Comprehensive Review 2026

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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%.

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# Funding Statement

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# Analysis Parameters

**Time Periods**
52 weeks to 22/02/2026

**Data Source**
NIQ Homescan™

**Markets**
AUS
Major Supermarkets (Coles, Woolworths, Aldi)
Other Supermarkets (Costco, Asian Grocers and all other full-service supermarkets)
Non-Supermarkets (Greengrocers, Markets and Speciality Stores)

**Measures**
Value ($), Volume (kg)

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# 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

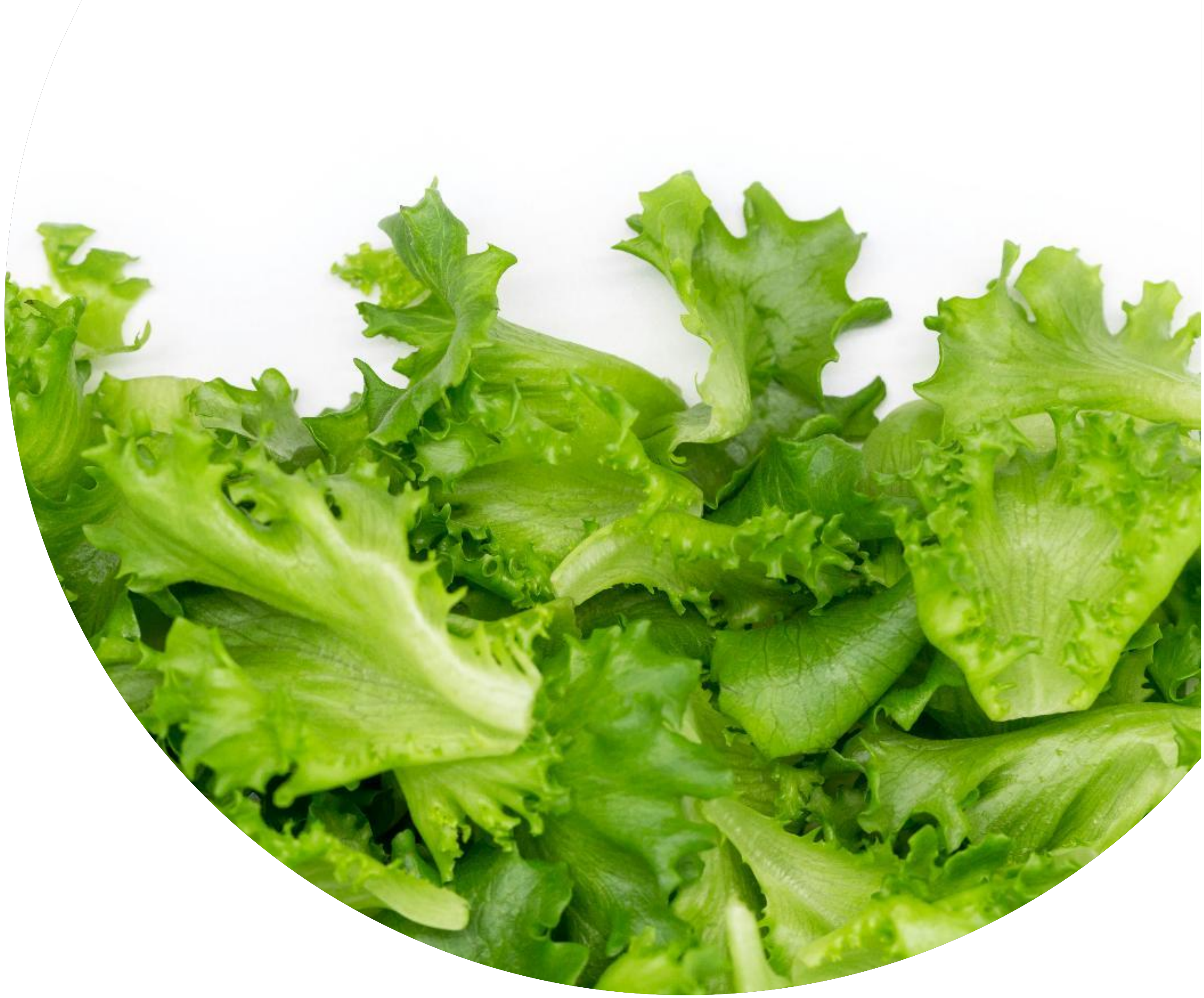
**LOW HOUSEHOLD INCOME** | Household income up to $50K per annum.

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

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

# Inclusions

| Section # | Report Sections |
| --- | --- |
| 1 | **Lettuce vs Comparable Vegetables** |
| 2 | **Sales Drivers** |
| 3 | **Retailer Performance** |
| 4 | **Format Performance**<br>In major supermarkets (Woolworths, Coles, Aldi) |
| 5 | **Profiling Lettuce Shoppers** |



# Performance summary – Lettuce

| | Key Insights |
|---|---|
| 1 **Lettuce vs comparable vegetables** | • In line with the fresh vegetable market average of +4.7%, lettuce dollar sales grew by +5% this year<br>• Despite growth observed across total market and most comparable vegetables, retail volumes dropped by -1.5% compared to one year ago<br>• Ahead of the market average of +3.4%, lettuce average price per kilogram grew by +6.5% this year |
| 2 **Sales drivers** | • Purchase occasions trended down this year, resulting in annual purchase volumes dropping by 100g<br>• Penetration held however, remaining at 74% of Australian households |
| 3 **Retailer Performance** | • Compared to last year, fresh vegetable volumes are flat across major supermarkets, however lettuce volumes dropped by -2.1% across this channel<br>• Volumes are behind last year across specialty stores also, by -1.8%<br>• The non major supermarkets minimized national losses as the only channel to register volume growth of +3.8% this year |
| 4 **Format Performance** | • Across major supermarkets prepacked volumes are flat with losses stemming from loose lettuce - volume dropped by -5.9% compared to one year ago as fewer households purchased this format |
| 5 **Profiling Lettuce Shoppers** | • The steepest volume losses were amongst senior couples, singles, young transitionals and families with teenage children<br>• In terms of income, higher prices impacted low-income shoppers the most, with volumes dropping by -6.2% amongst this group |
| **What does this mean?** | • Stem trip losses with messaging that focuses on the value of lettuce as a staple – focus on freshness and versatility to give shoppers a reason to purchase more often<br>• Restore growth across major supermarkets by prioritizing the prepacked format – this is the format that resonates with the most shoppers that purchase more often |

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# Lettuce vs Comparable Vegetables

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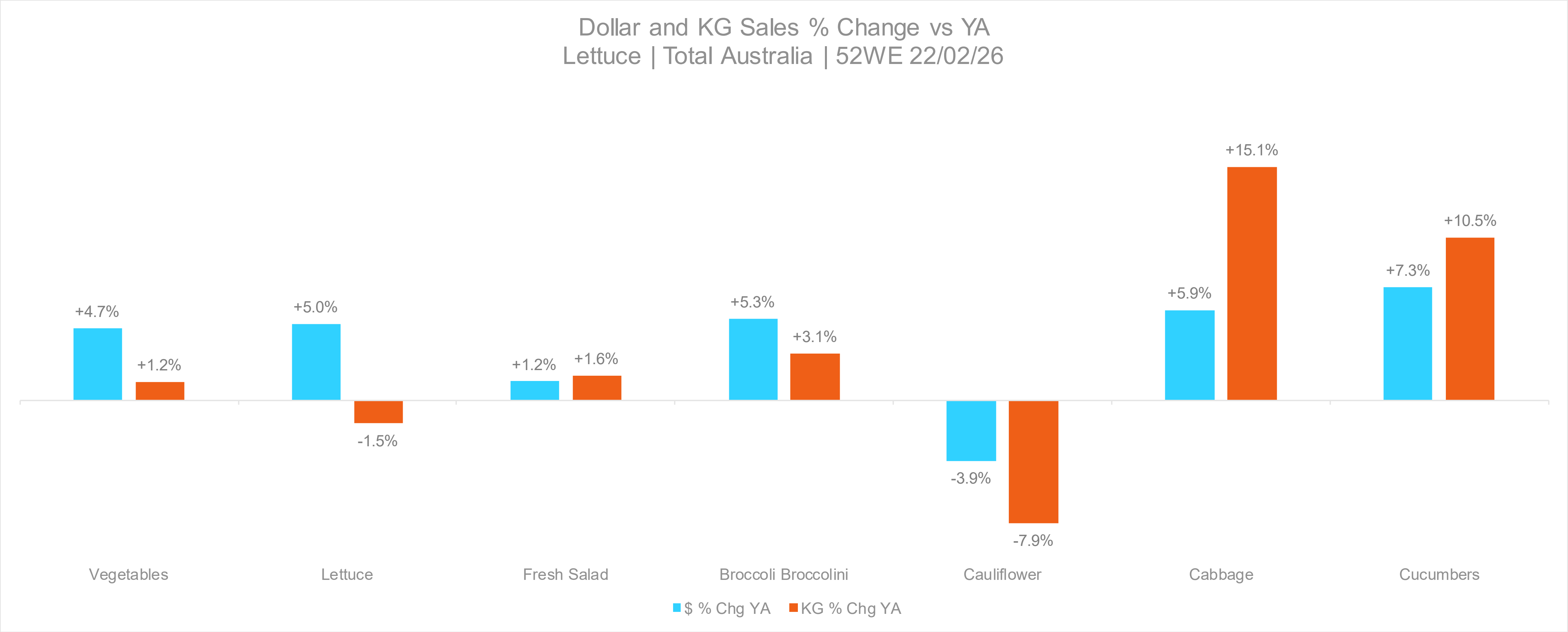
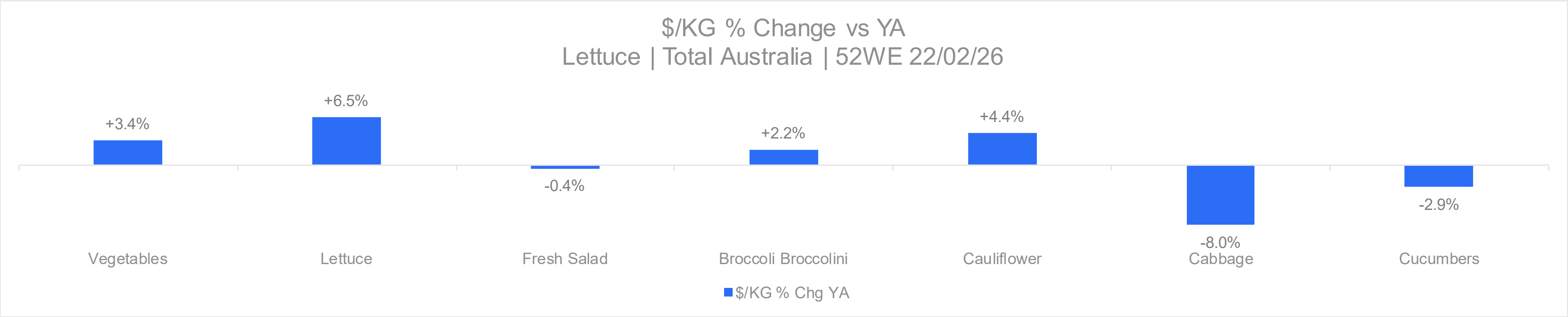
# While dollar sales growth is aligned with total market, lettuce retail volumes dropped by -1.5% this year.

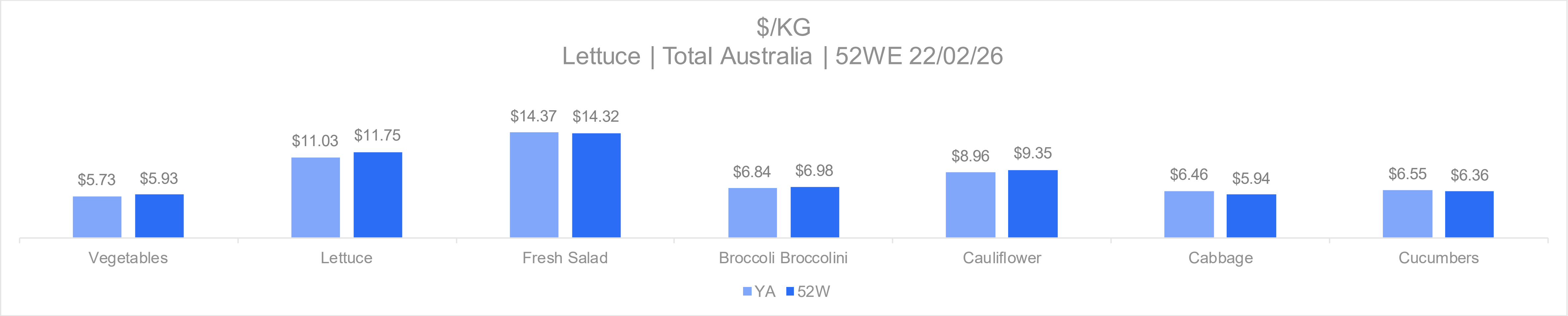
With cauliflower the exception, all other comparable vegetables registered volume growth this year.




Source: NielsenIQ

# Impacting volume growth, lettuce prices grew ahead of the market average and all comparable vegetables at +6.5% this year.



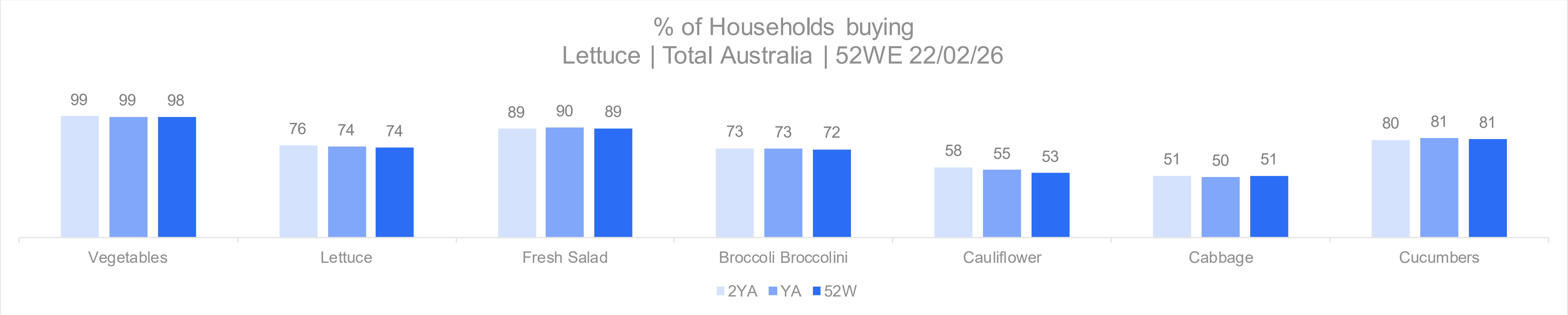



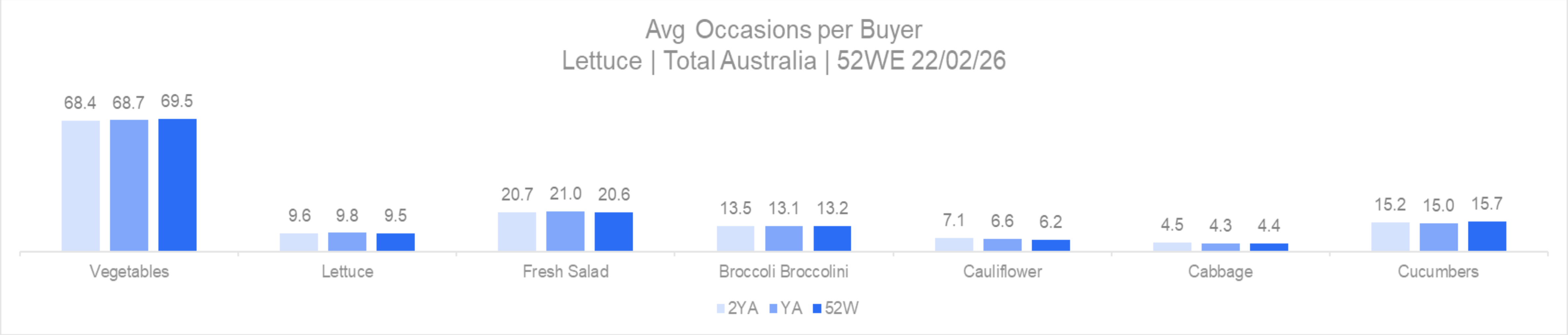

Source: NielsenIQ

# Sales Drivers

# While household penetration levels held at 74%, lettuce purchase frequency levels trended down this year.

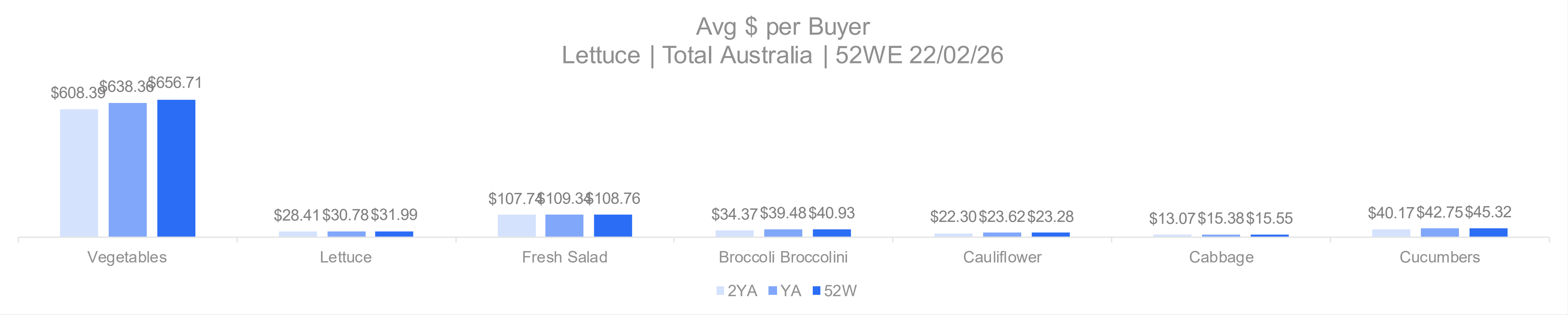
In contrast, shoppers are purchasing fresh vegetables more often this year.

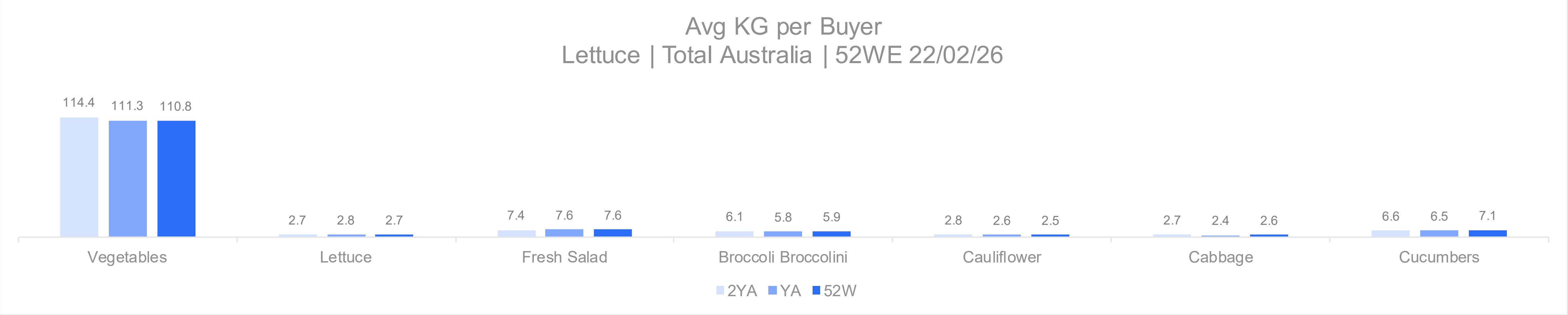



Source: NielsenIQ

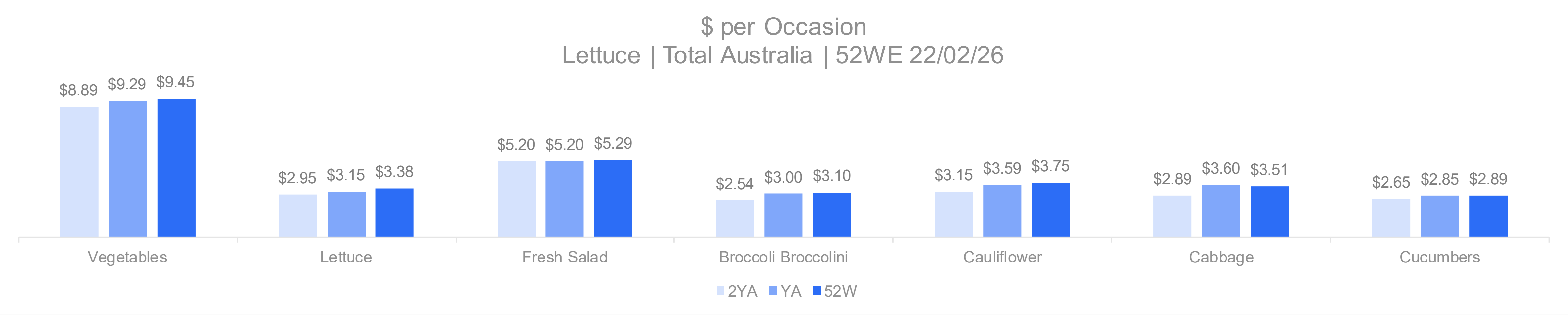
# In line with higher prices, annual spend levels grew this year however purchase volumes dropped by approx. 100g per household.

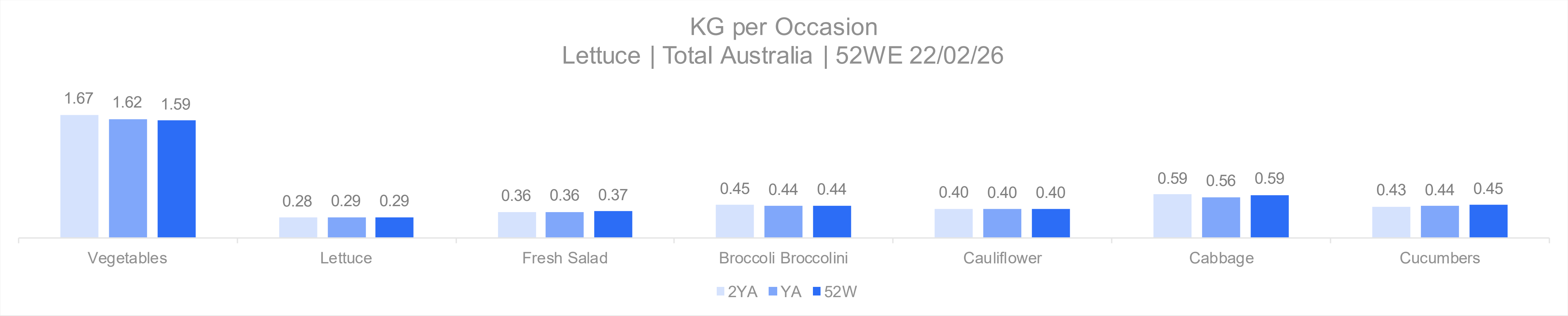



Source: NielsenIQ

# Lettuce spend per trip peaked to $3.38 this year.

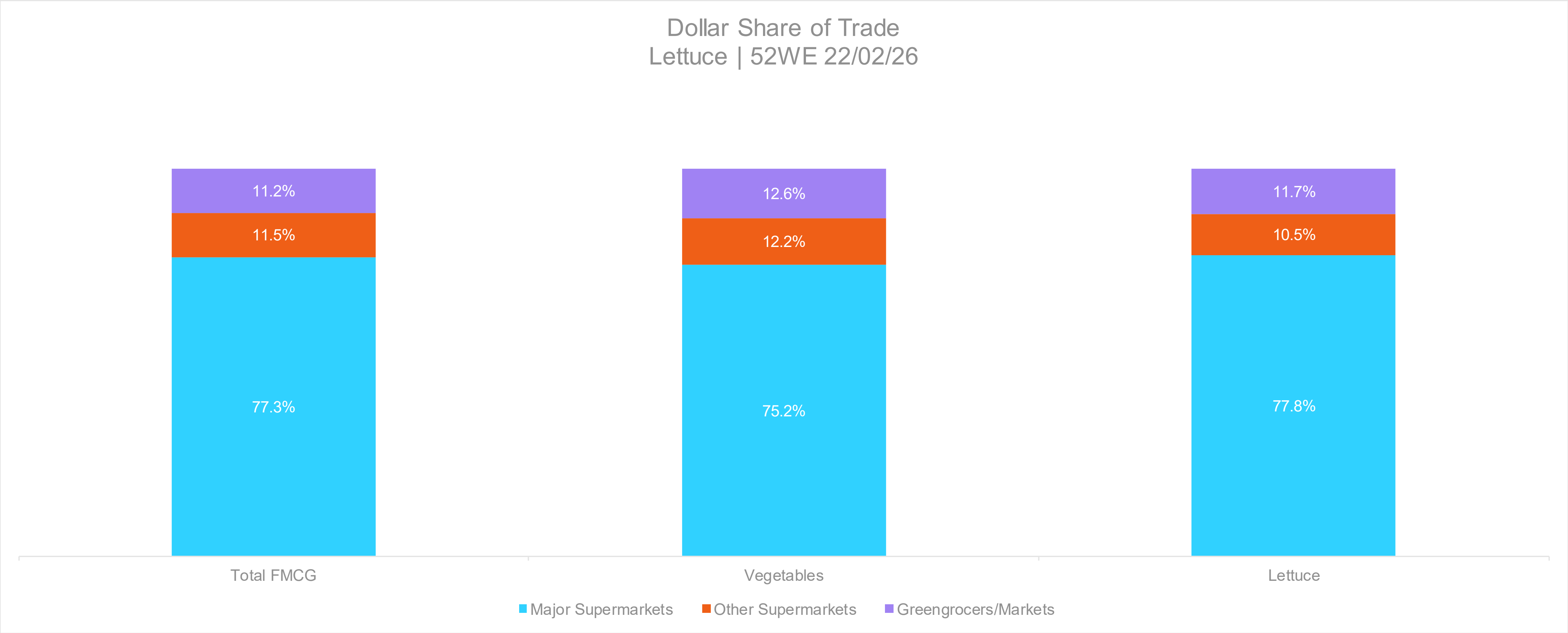



Source: NielsenIQ

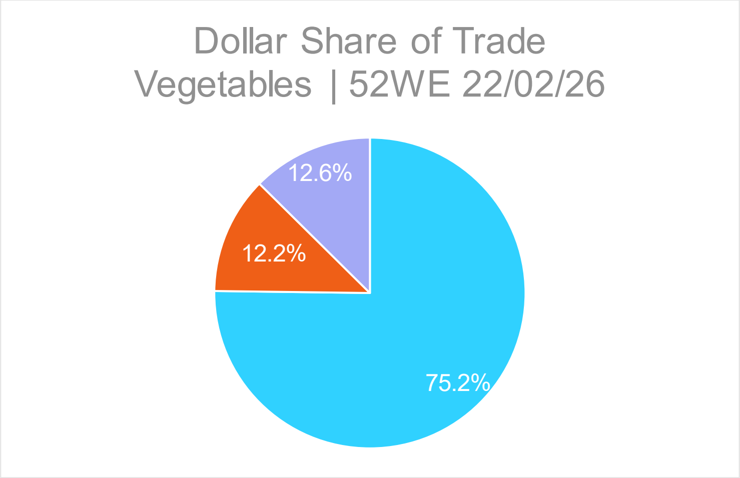
# Retailer Performance

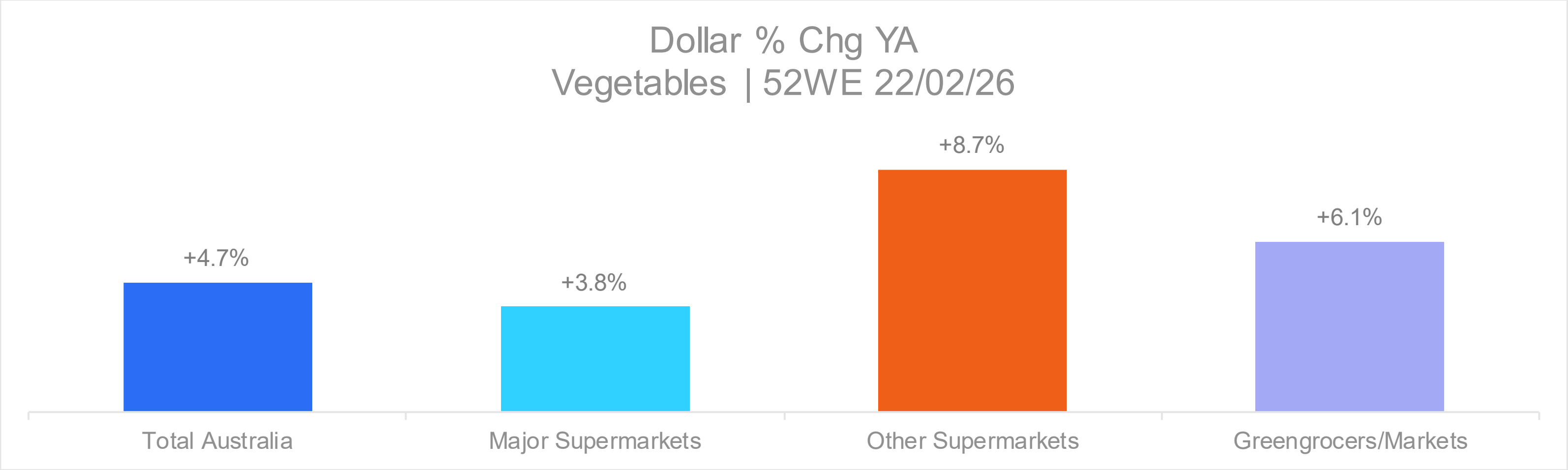
# Major supermarkets over-trade in lettuce sales, in comparison to the fresh vegetables market.

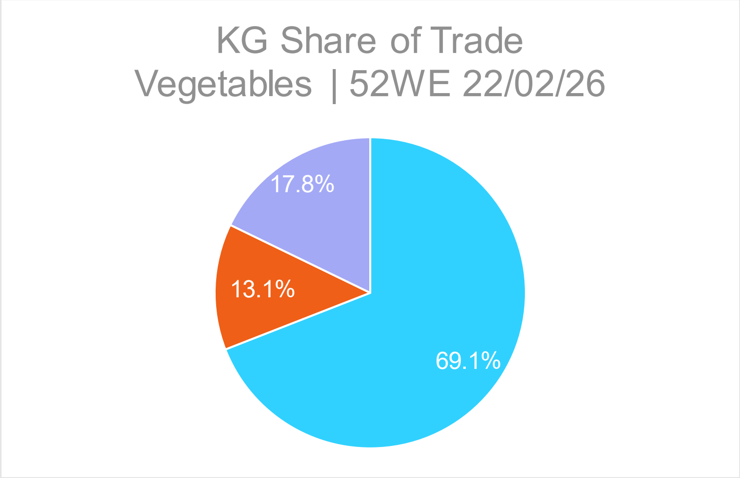


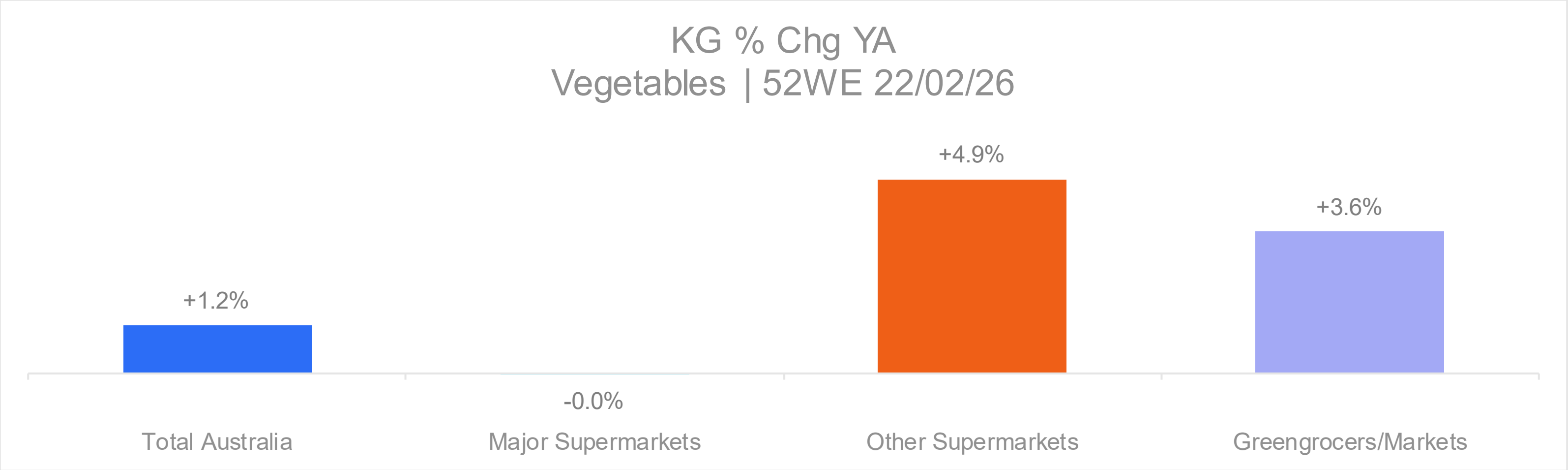

Source: NielsenIQ

# Limiting national growth, fresh vegetable volumes remain flat across the major supermarket channel, compared to one year ago.



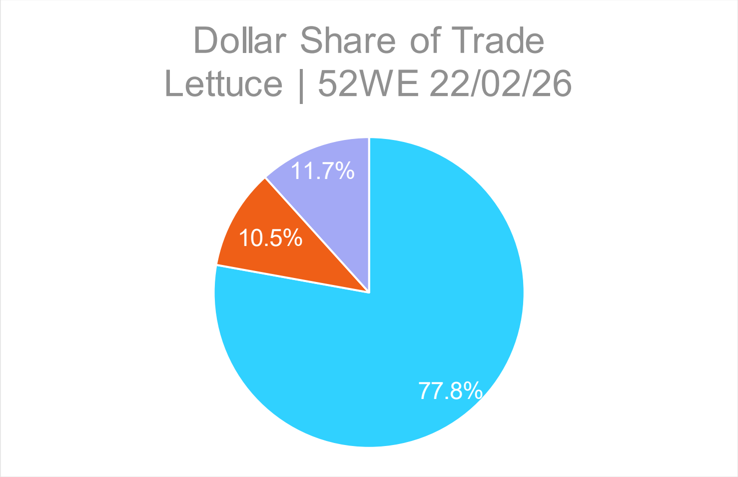



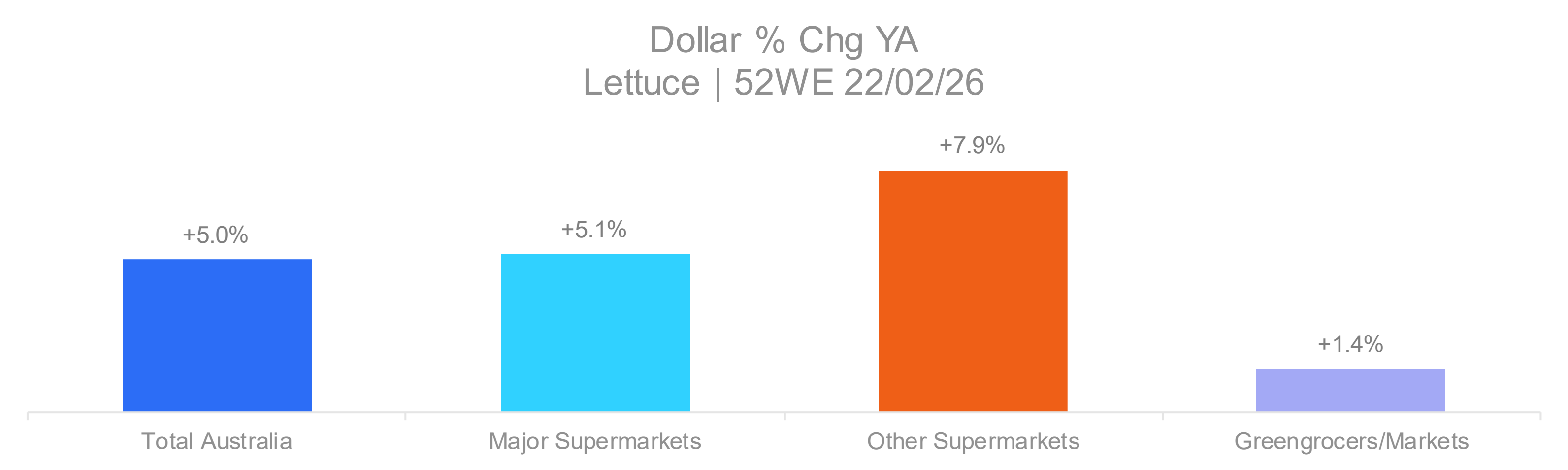



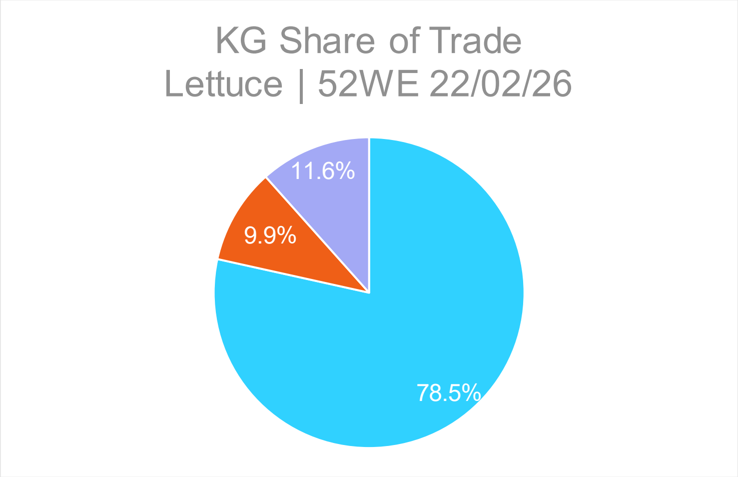



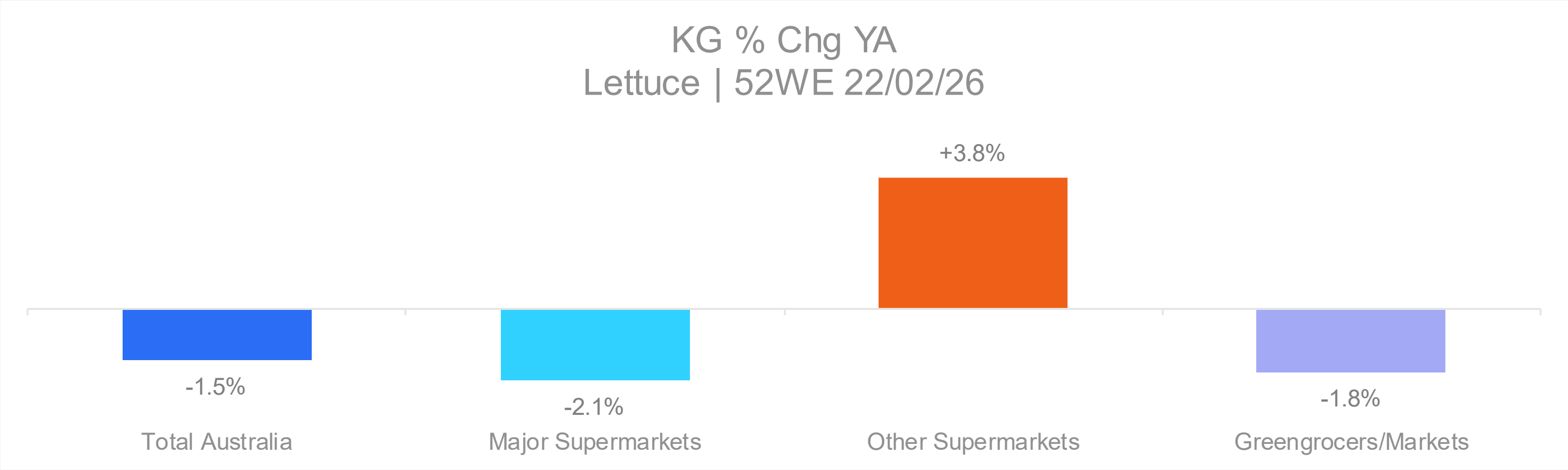

Source: NielsenIQ

# Negating growth from non majors, lettuce retail volumes dropped by approx. 2% across major supermarkets and specialty stores this year.




Source: NielsenIQ

# Format Performance

In major supermarkets (Woolworths, Coles, Aldi)

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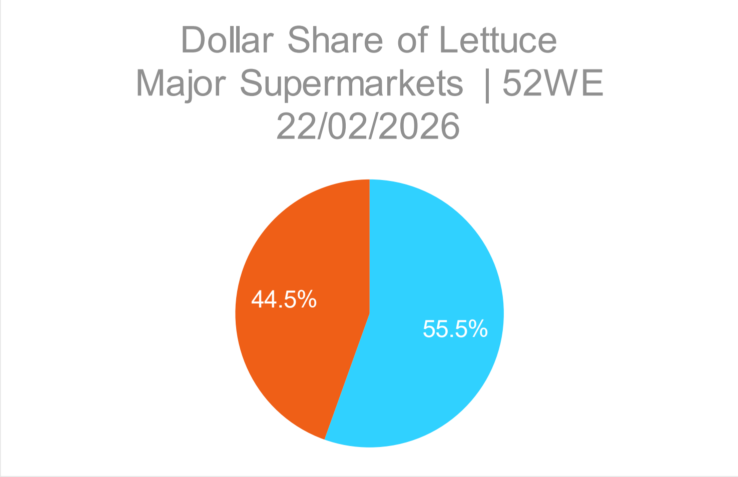
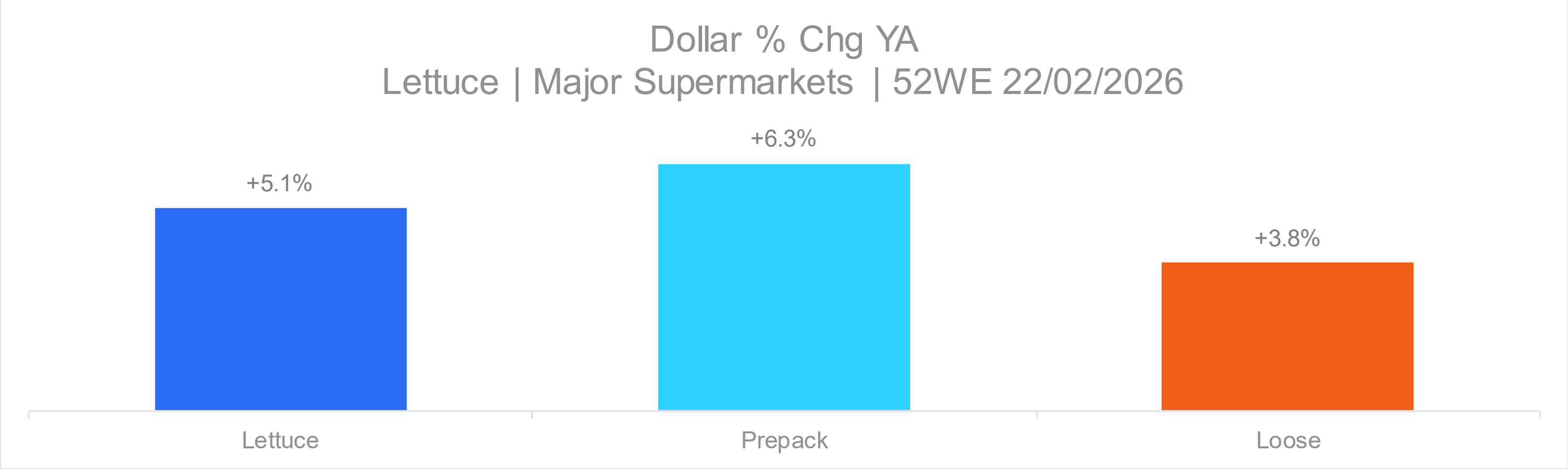
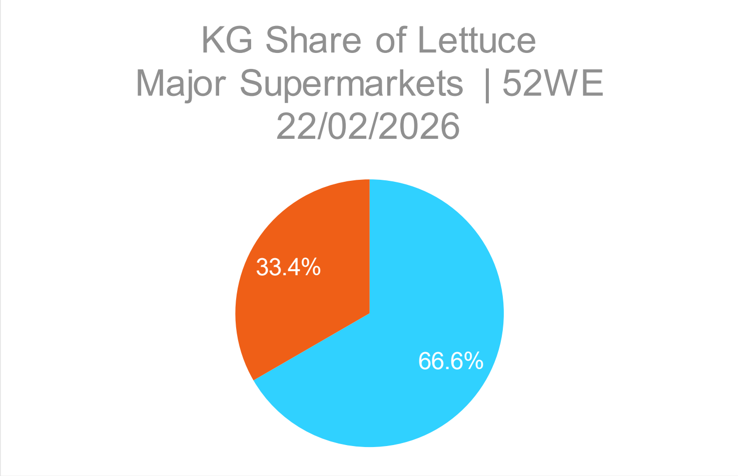
# While prepacked volumes are flat, losses across major supermarkets stem from loose lettuce with volume dropping by -5.9% compared to one year ago.



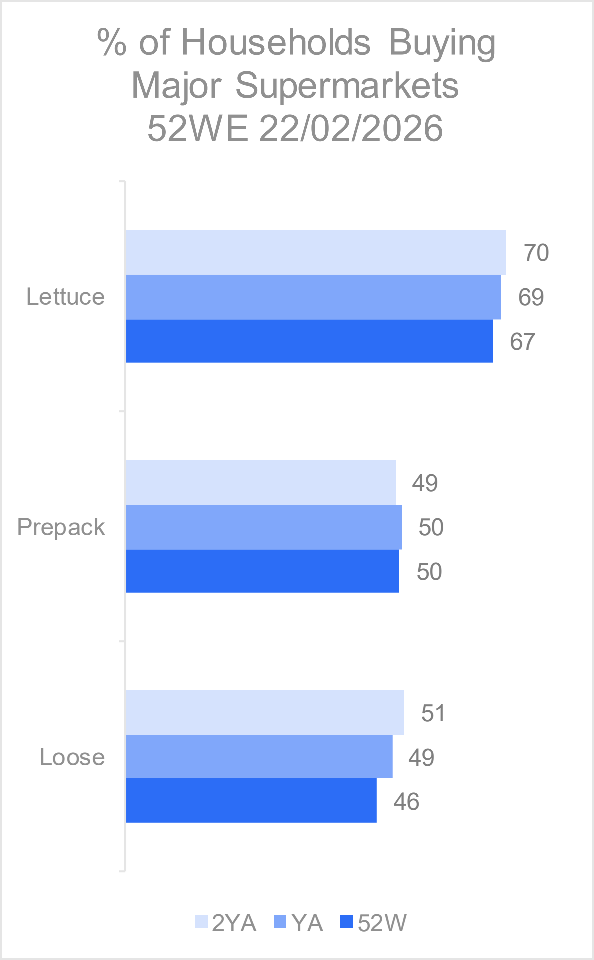



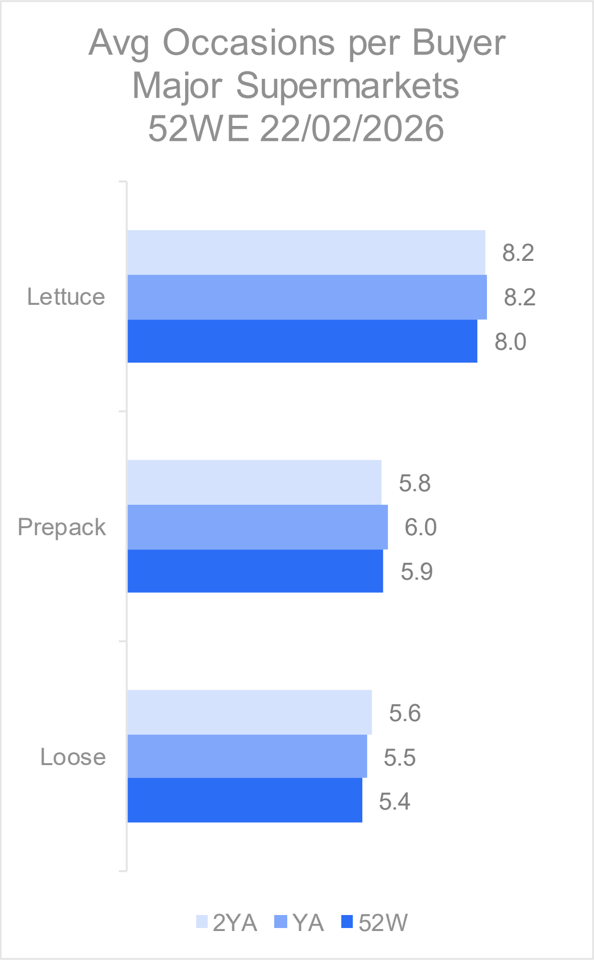



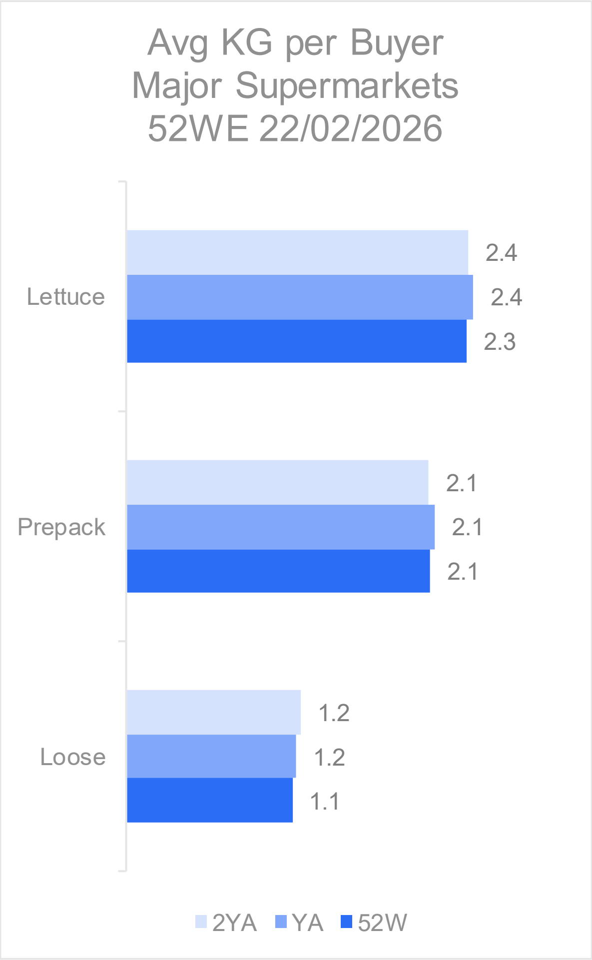


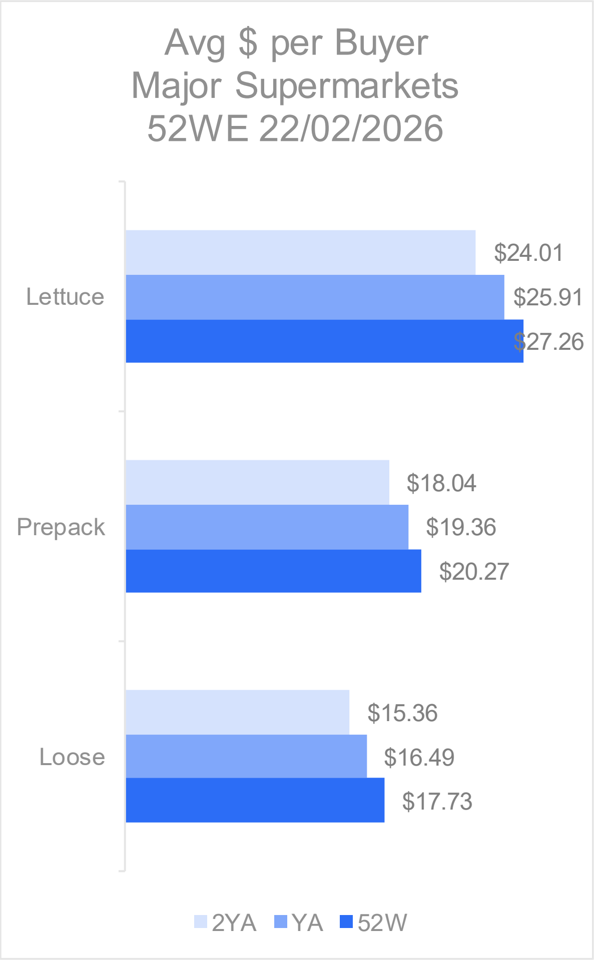
Source: NielsenIQ

# Penetration losses have impacted loose volumes across major supermarkets this year.

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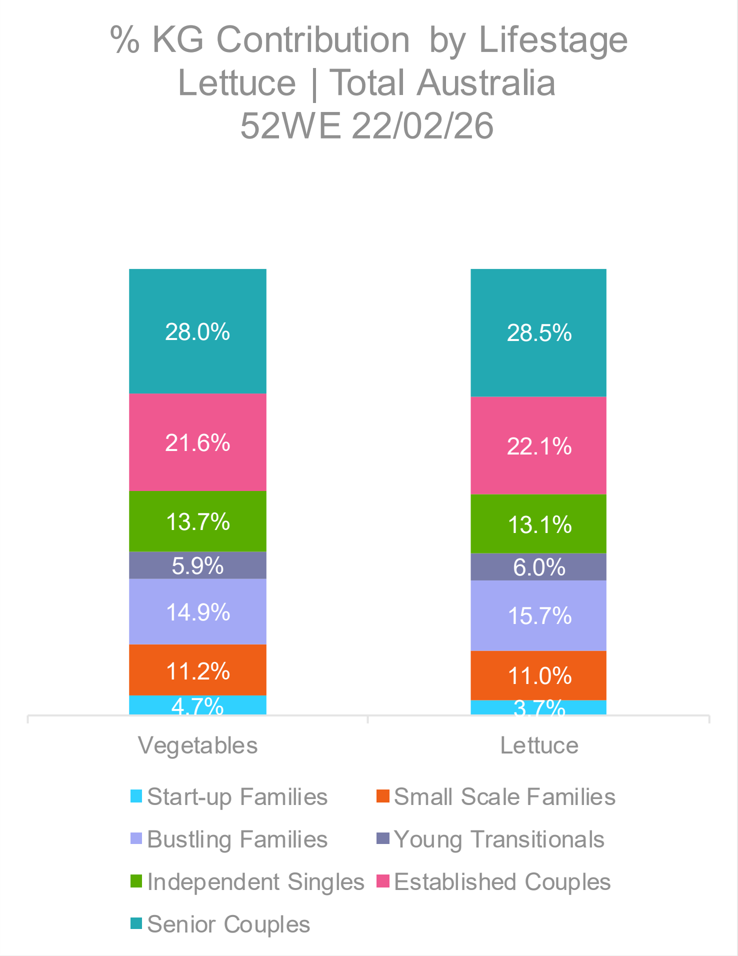
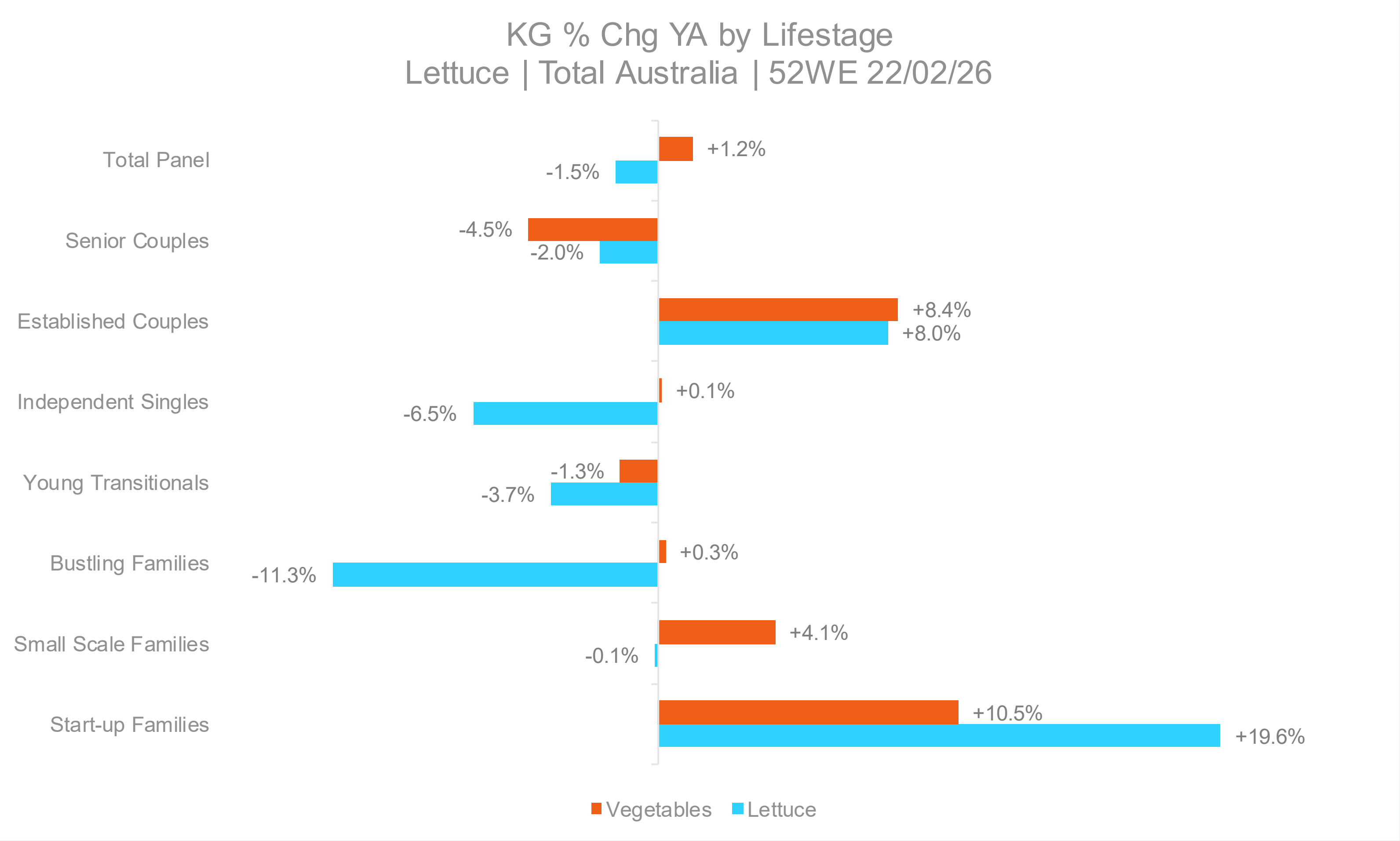
# Profiling Lettuce Shoppers

# The steepest volume losses were amongst senior couples, singles, young transitionals and families with teenage children.

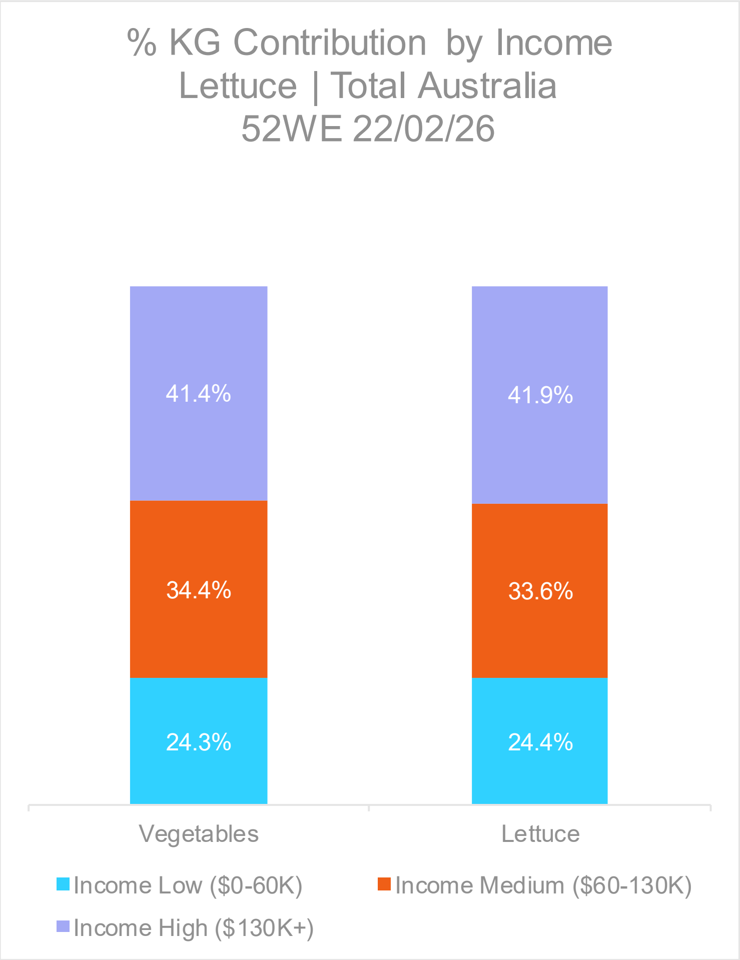
However, retail volume growth was evident amongst established couples, and households with babies.

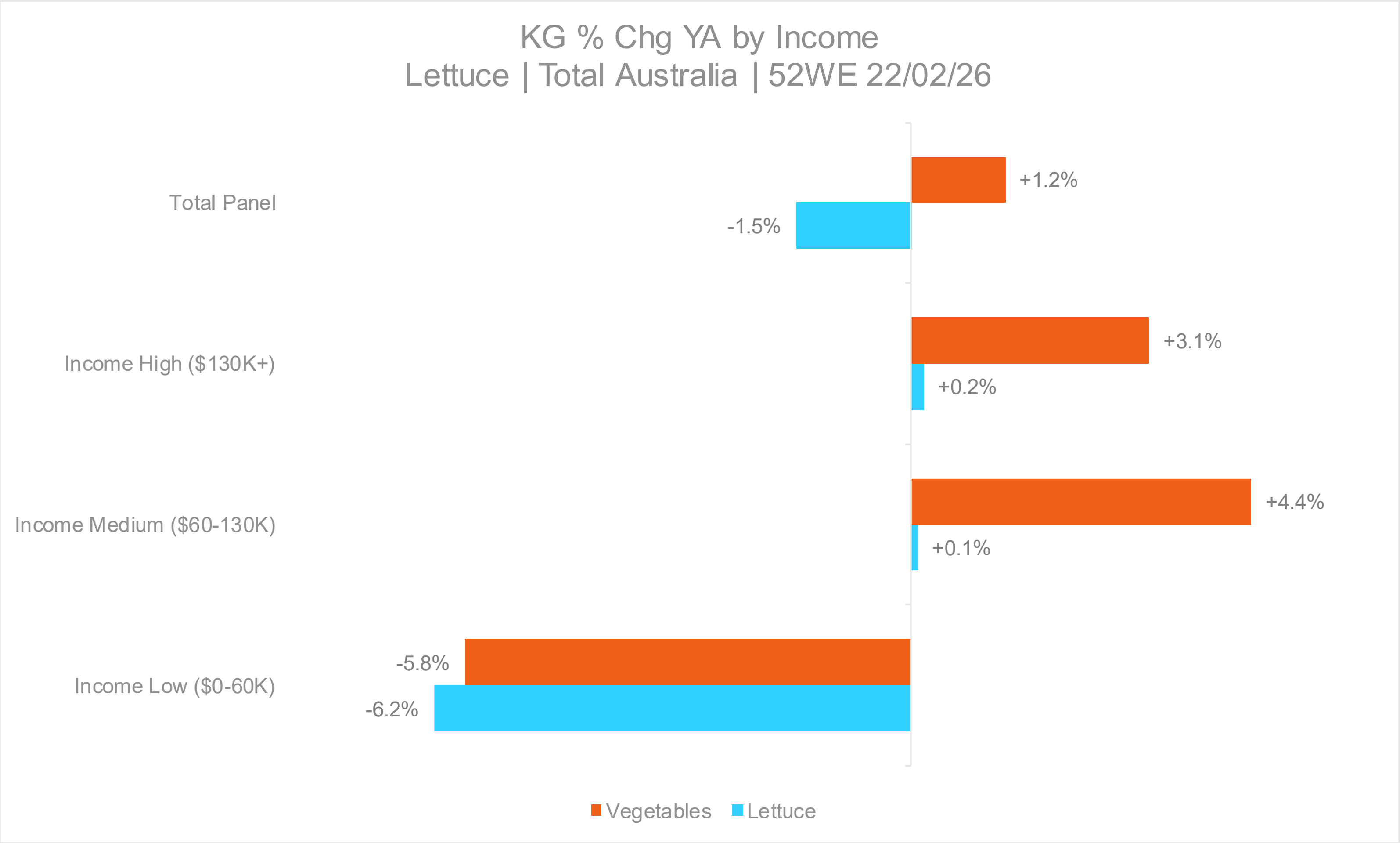



Source: NielsenIQ | * Low Sample Size, Do Not Use

# In terms of income, retail volumes held across high and medium income households however dropped across low.




Source: NielsenIQ

# Thank you