

Broccoli/Broccolini Comprehensive Review 2026



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 22/03/2026

Data Source

NielsenIQ 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)

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 Broccoli/Broccolini vs Comparable Vegetables

2 Sales Drivers

3 Retailer Performance

4 Format Performance
In major supermarkets (Woolworths, Coles, Aldi)

5 Profiling Broccoli/Broccolini Shoppers



Performance summary – Broccoli/Broccolini

	Key Insights
1 Broccoli vs Comparable Vegetables	<ul style="list-style-type: none"> • Broccoli/broccolini dollar sales grew by +4.2% year on year, broadly in line with the total fresh vegetable market and ahead of most comparable vegetables • Retail volume growth was more moderate at +2.4%, with only capsicum and Asian vegetables growing faster, highlighting softer underlying demand than top-performing categories • Price growth was contained at +1.7%, below the market average and behind most comparable vegetables
2 Sales drivers	<ul style="list-style-type: none"> • Category growth was driven by higher spend per trip and higher annual spend per buyer, rather than increased purchase frequency • Buyer penetration softened to 72%, with fewer households purchasing broccoli/broccolini compared to last year
3 Retailer Performance	<ul style="list-style-type: none"> • Major supermarkets played a key role in driving value growth, but failed to deliver volume growth with a loss of -0.5% vs last year
4 Format Performance	<ul style="list-style-type: none"> • Across the major supermarkets, strong prepacked growth was offset by a volume loss for loose • Prepacked performance benefited from higher purchase frequency, spend and volume per buyer suggesting a shift toward prepacked as the primary growth engine in major supermarkets
5 Profiling Broccoli Shoppers	<ul style="list-style-type: none"> • Volume growth was absent among families with babies, families with teenagers and senior couples, indicating clear demographic gaps • Medium and high income households led volume growth while there was a drop of -1.2% among the low income group
What does this mean?	<ul style="list-style-type: none"> • Broccoli/broccolini growth is currently value and not penetration-led, leaving expansion potential untapped • Major supermarkets represent the largest missed opportunity, where loose declines are suppressing volume despite strong prepacked momentum - growth will depend on re-engaging loose broccoli shoppers across these stores, while continuing to leverage prepacked formats

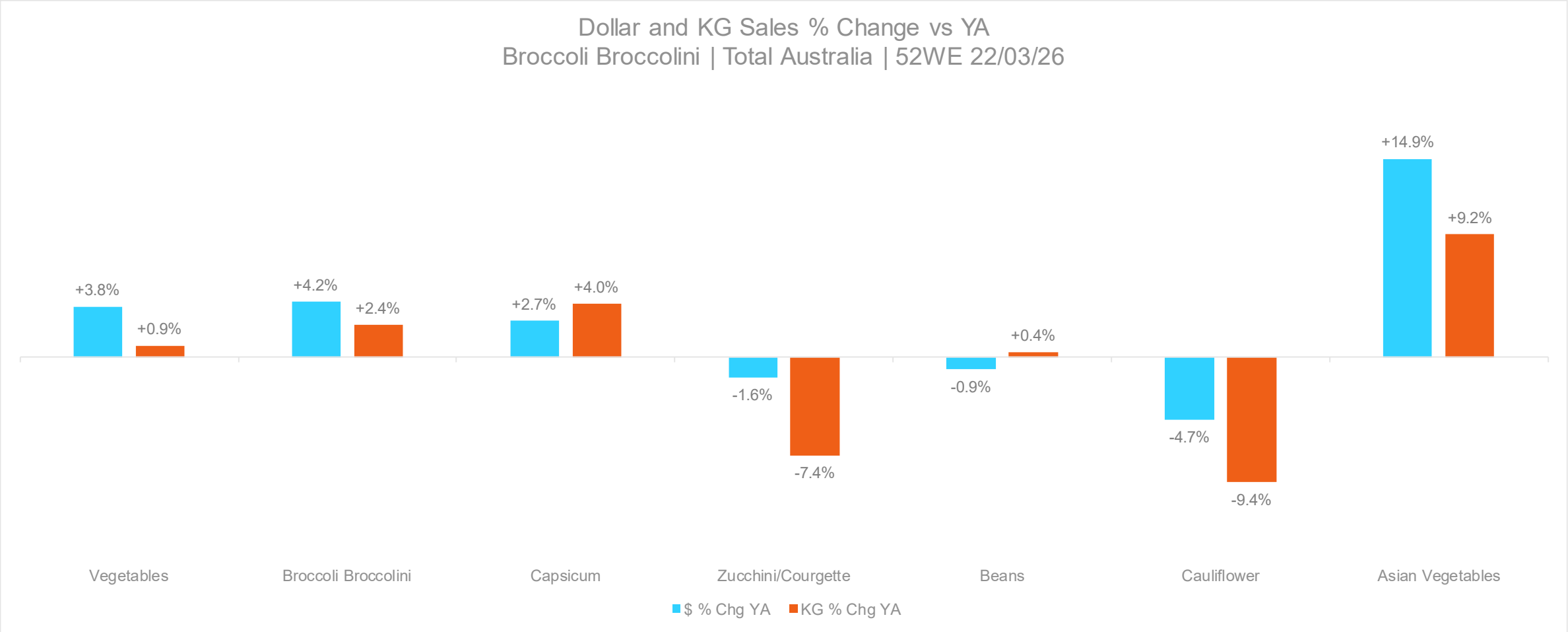
Broccoli/Broccolini vs Comparable Vegetables



In line with the fresh vegetable market average, broccoli/broccolini retail sales grew by +4.2% this year. Volume growth was behind however at +2.4%.

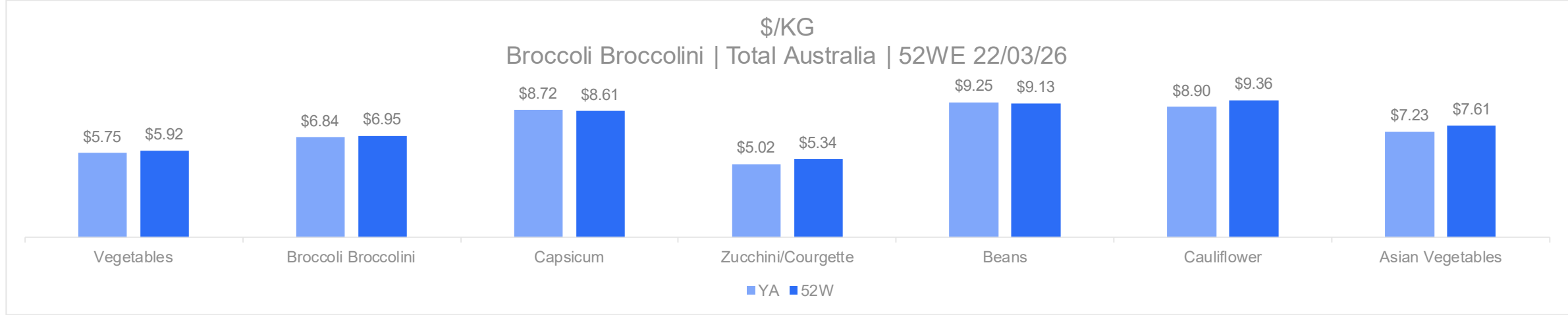
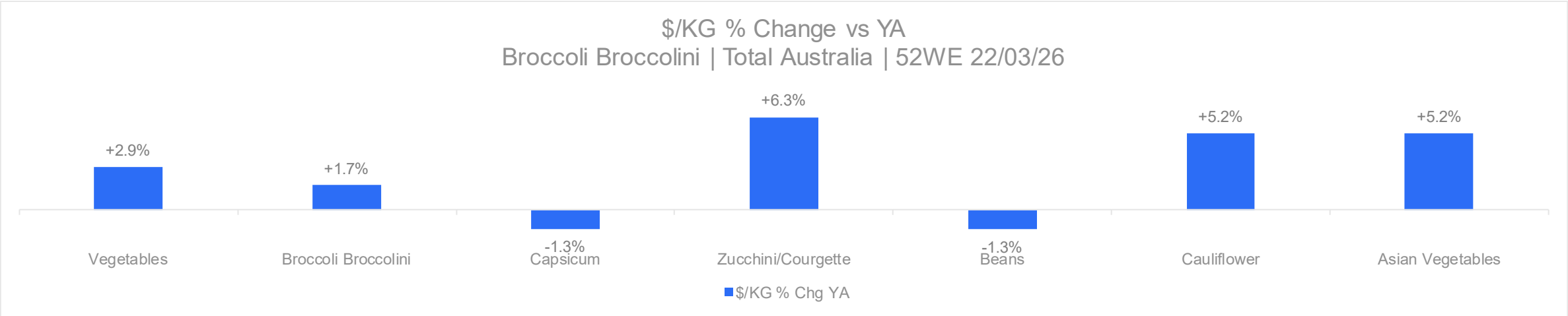
Amongst comparable vegetables, Asian vegetable and capsicum volumes grew the fastest.

Dollar and KG Sales % Change vs YA
 Broccoli Broccolini | Total Australia | 52WE 22/03/26



Source: NielsenIQ

Broccoli/broccolini prices grew by a modest +1.7% this year, softer than the market average and behind most comparable vegetables.



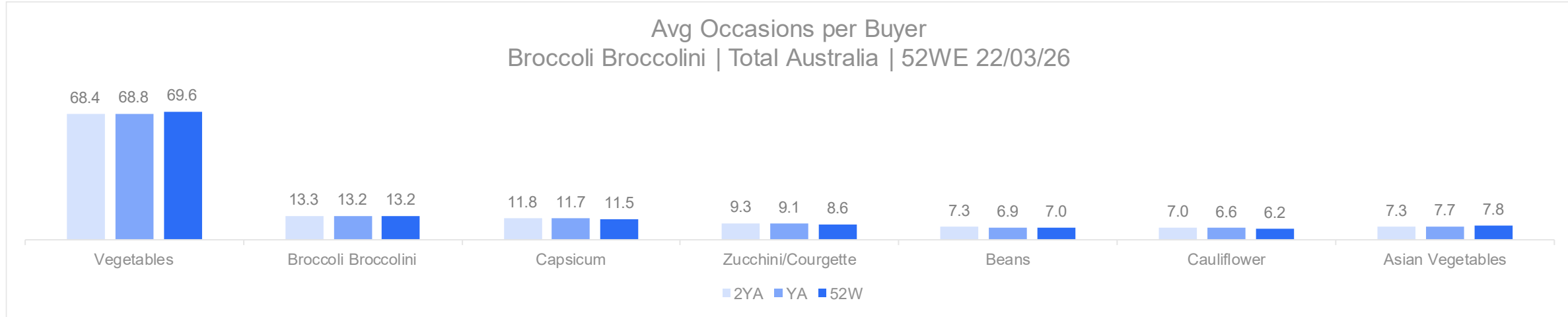
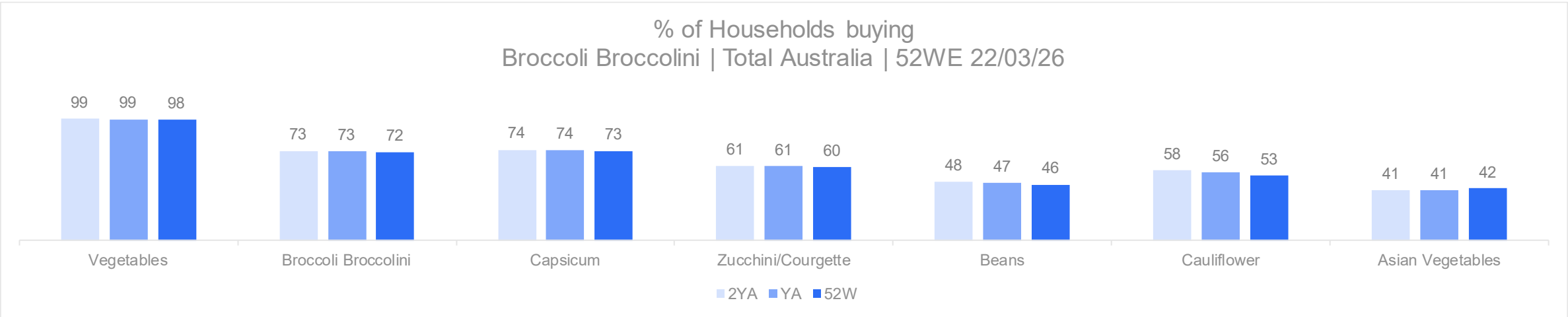
Source: NielsenIQ

Sales Drivers



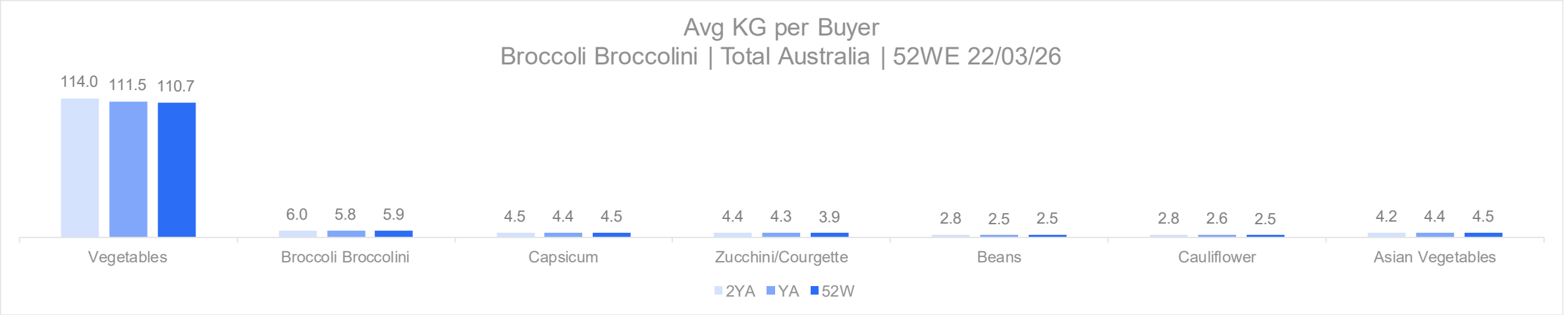
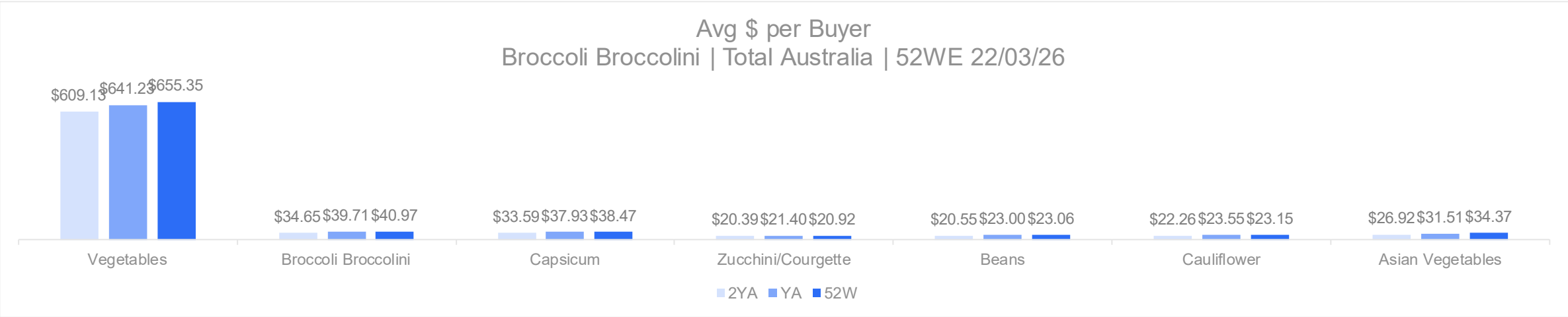
In line with broader market trends, broccoli/broccolini penetration levels softened this year, dropping to 72%.

Purchase frequency levels remain stable for broccoli/broccolini, while growth is observed at a total market level this year.



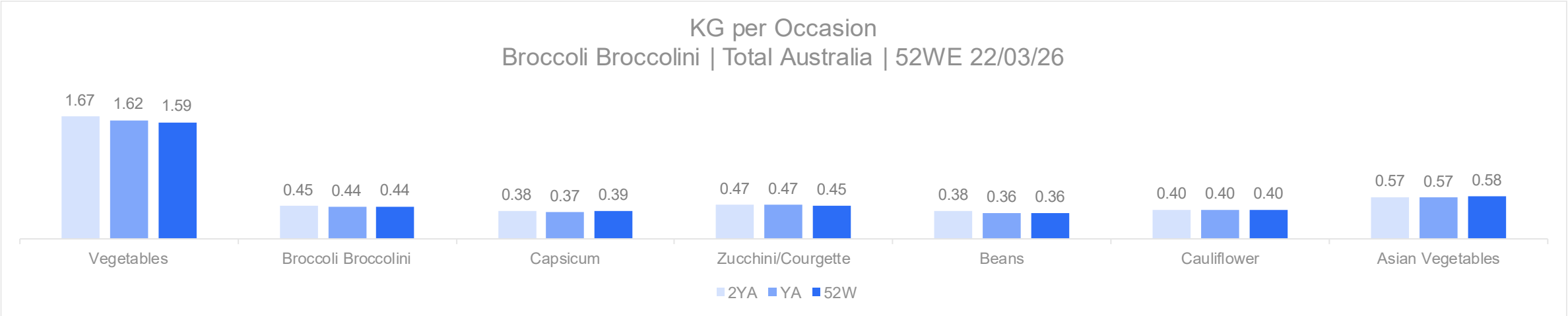
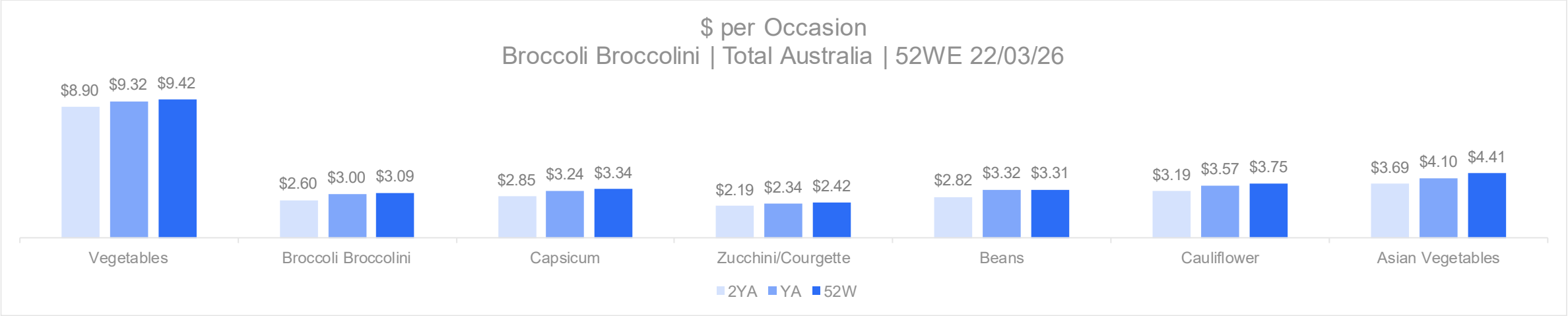
Source: NielsenIQ

Annual spend and purchase volumes shifted positively however, with the average buyer purchasing 5.9kgs per year.



Source: NielsenIQ

Higher spend per trip was the primary driver of annual spend growth, as opposed to heavier baskets.



Source: NielsenIQ

Retailer Performance



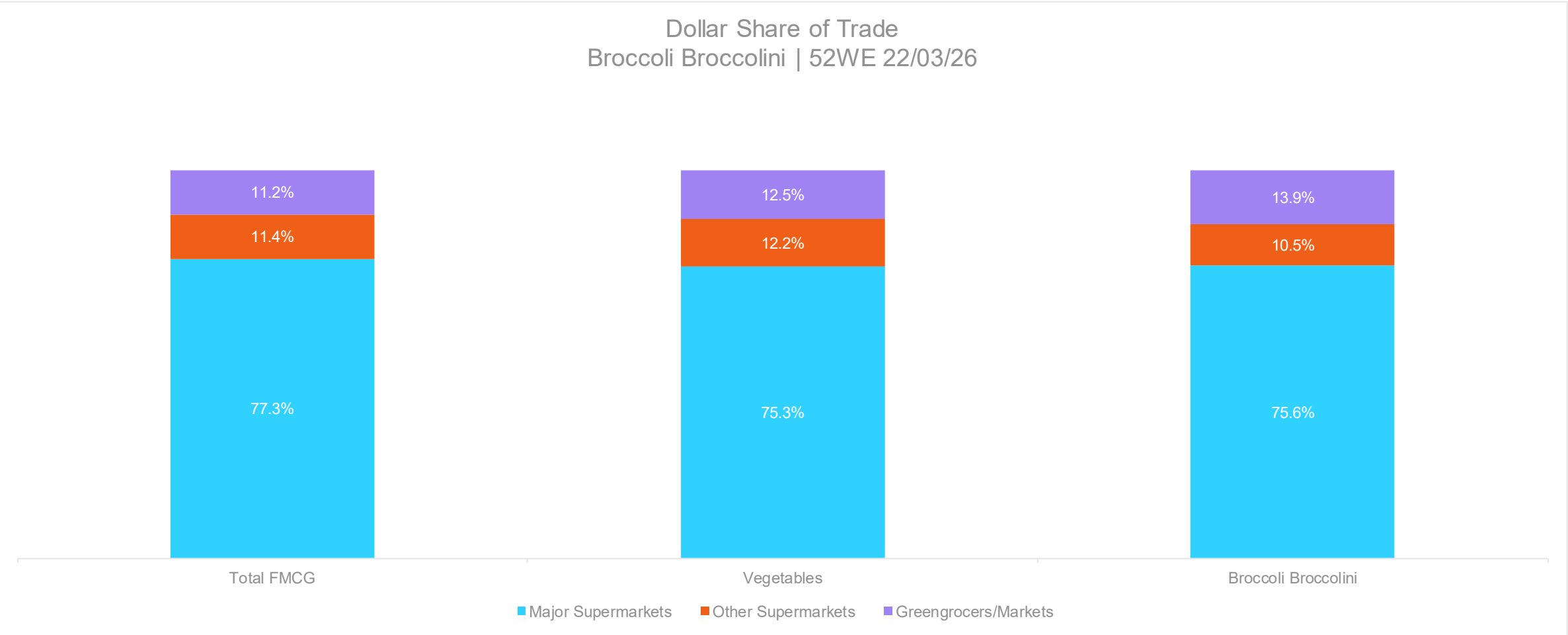
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Greengrocers/markets overtrade in broccoli/broccolini sales compared to their share of total grocery and fresh vegetables.

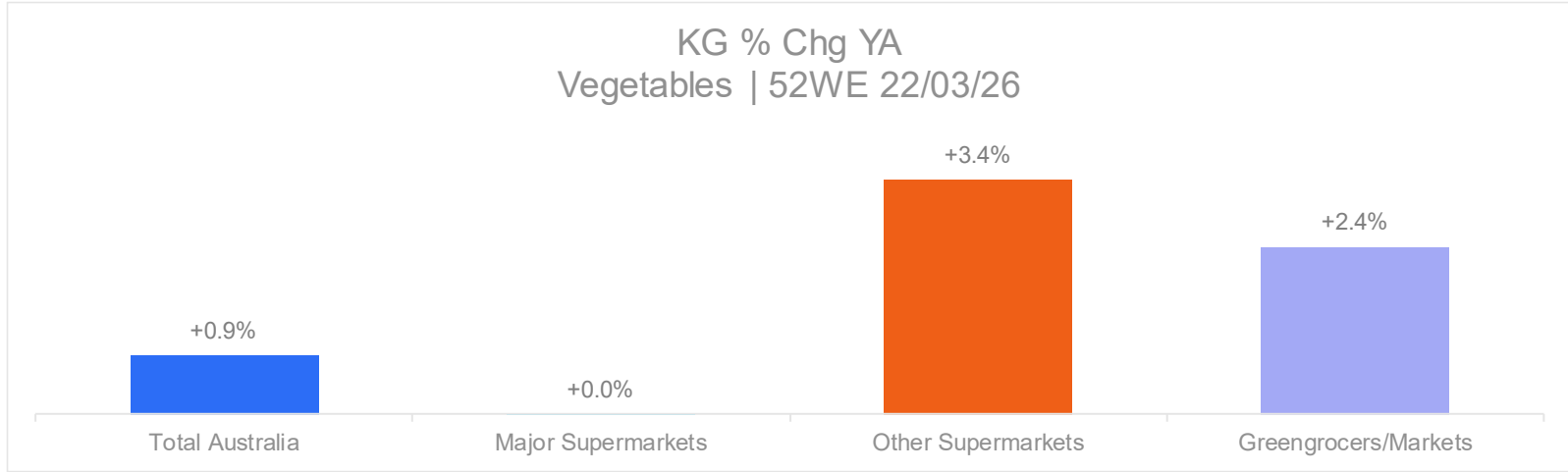
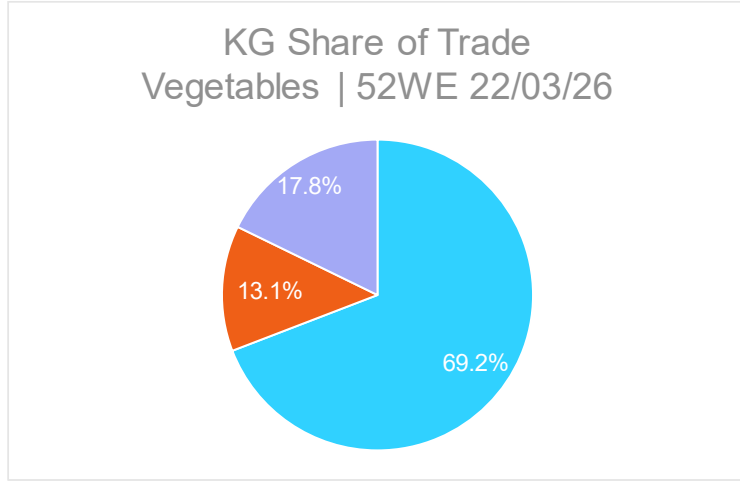
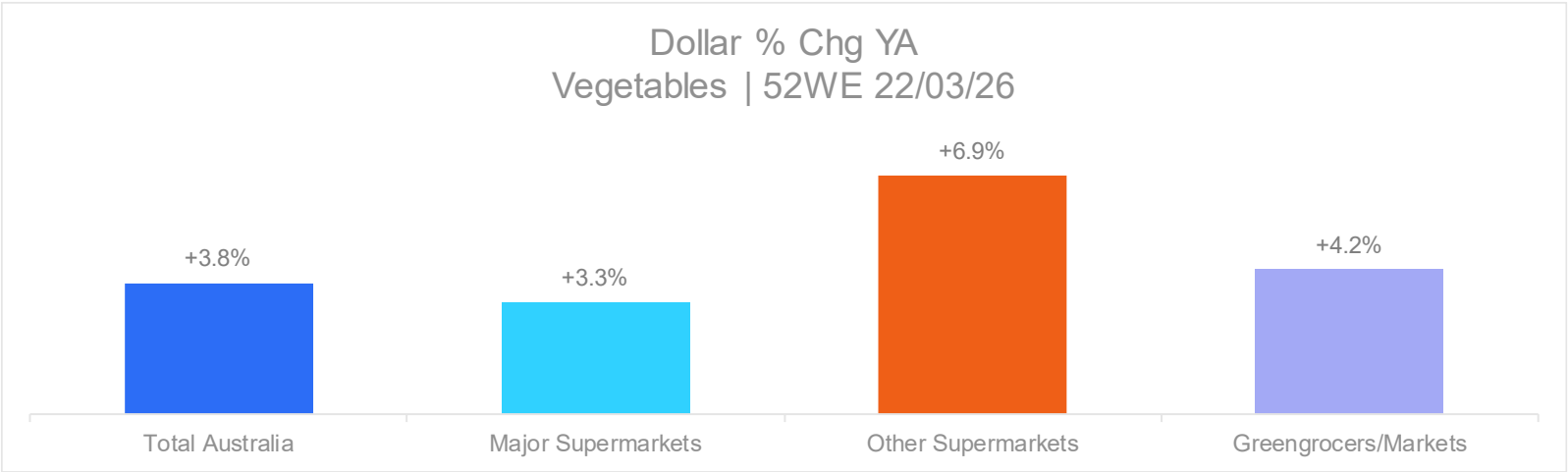
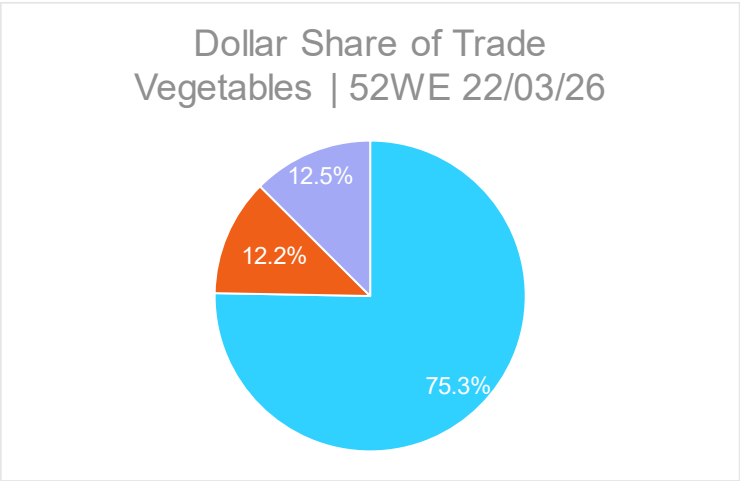
Dollar Share of Trade
Broccoli Broccolini | 52WE 22/03/26



Source: NielsenIQ

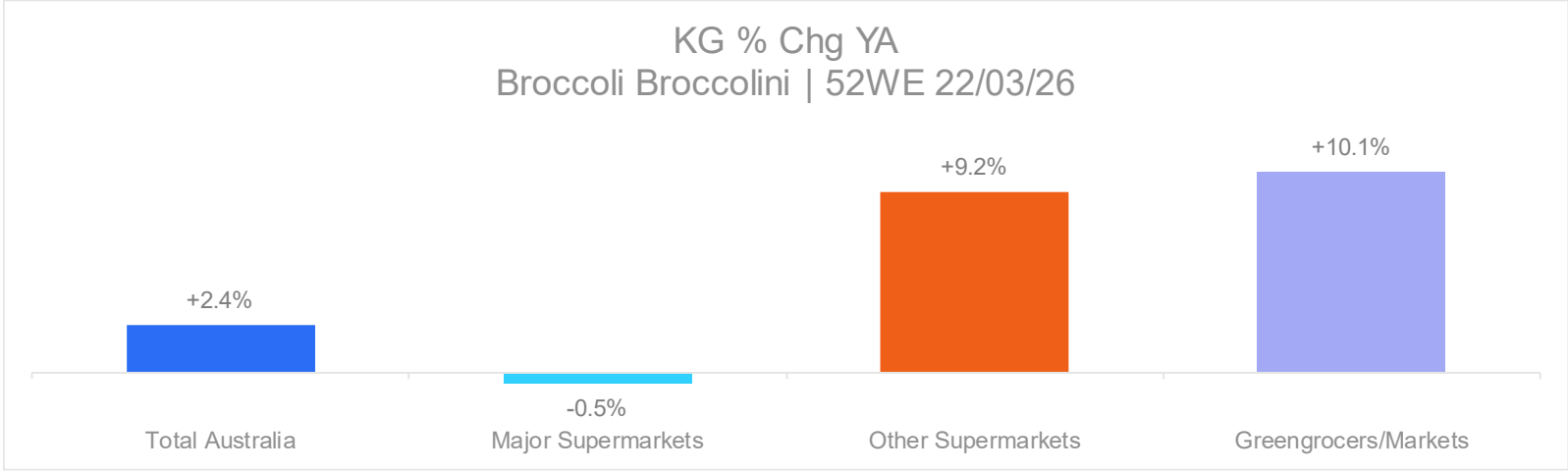
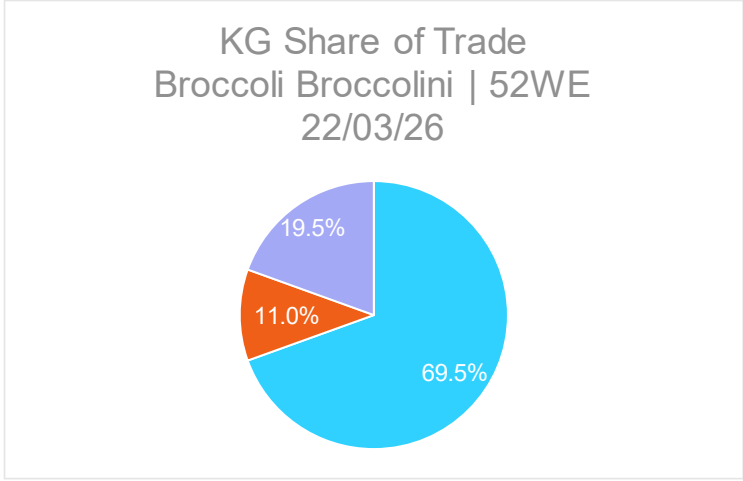
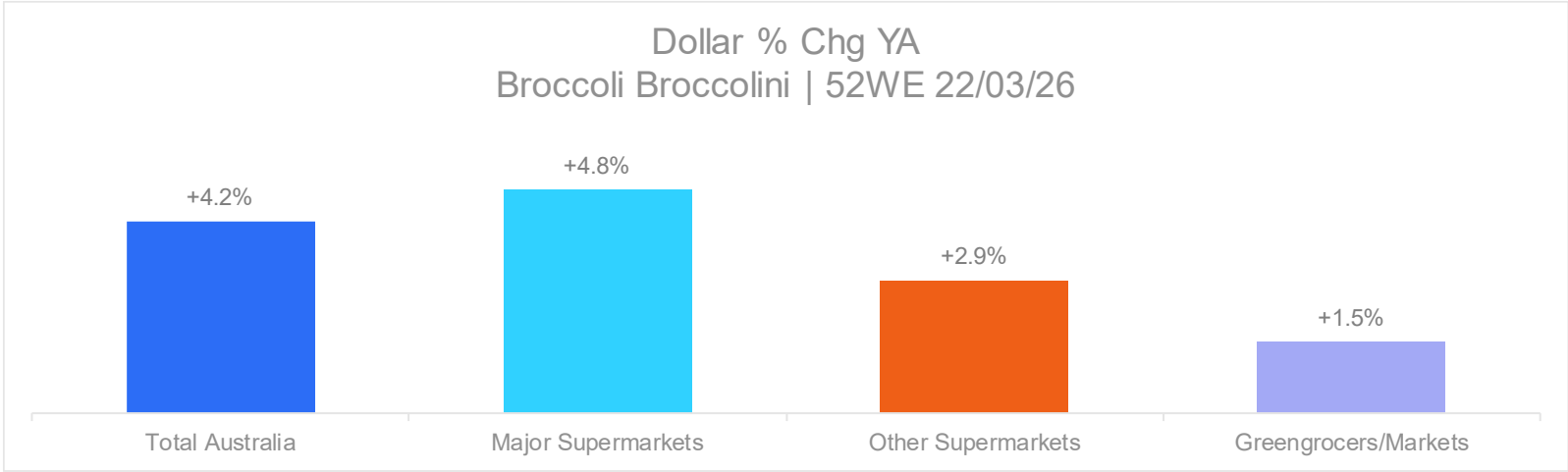
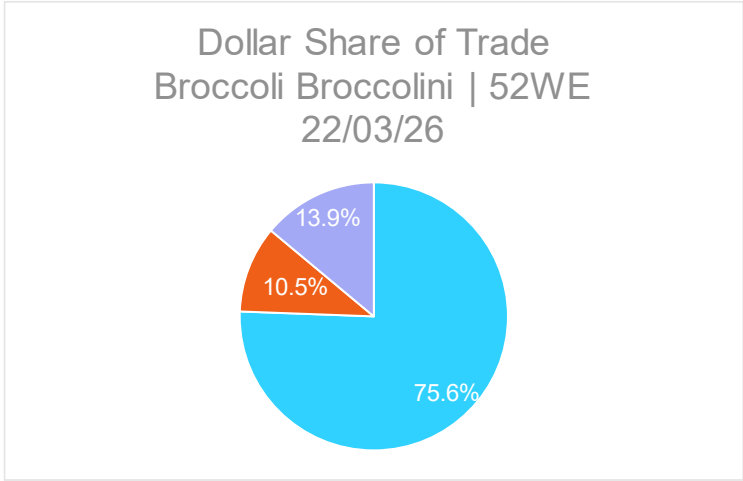
As the fastest growing retail channel, non-major supermarkets are a key driver of fresh vegetable dollar sales and volume growth this year.

Major supermarket retail volumes are flat vs last year however.



Source: NielsenIQ

Broccoli/broccolini retail volume growth was curbed by the major supermarkets where volume is behind last year by -0.5%.



Source: NielsenIQ

Format Performance

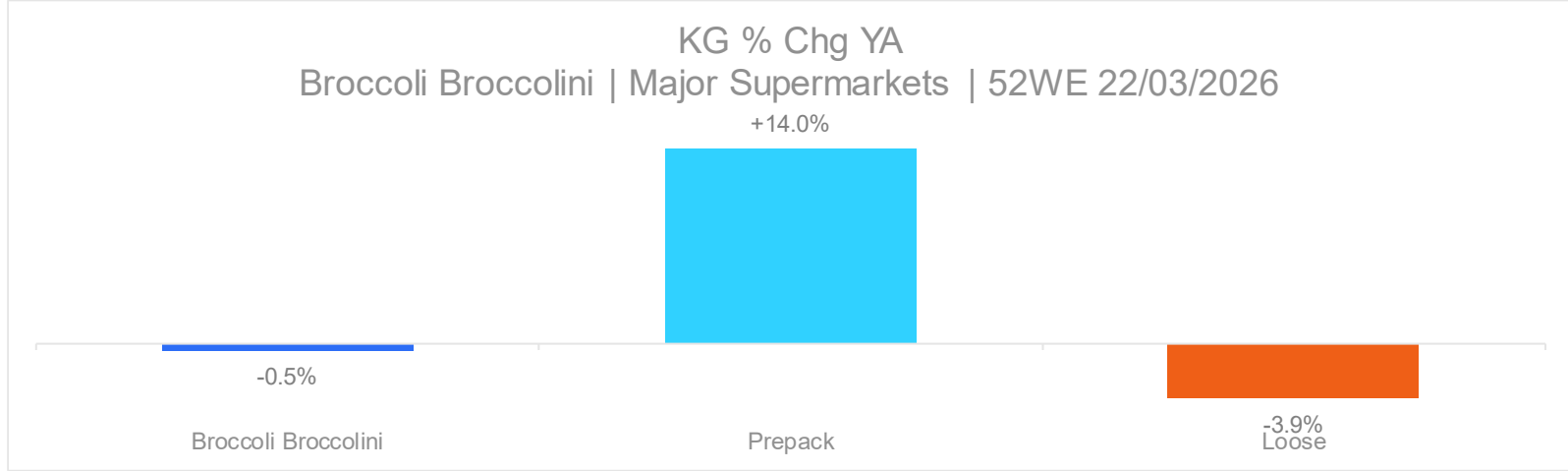
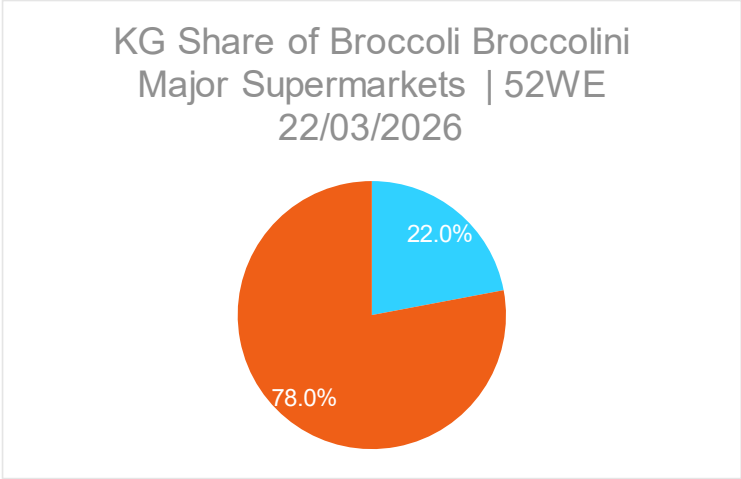
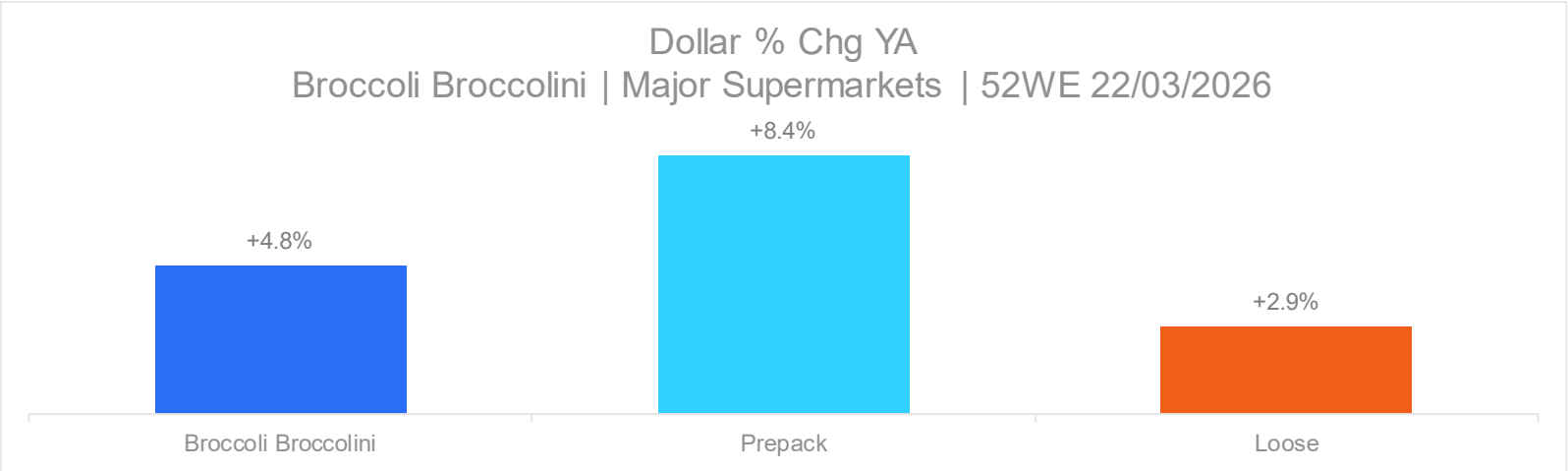
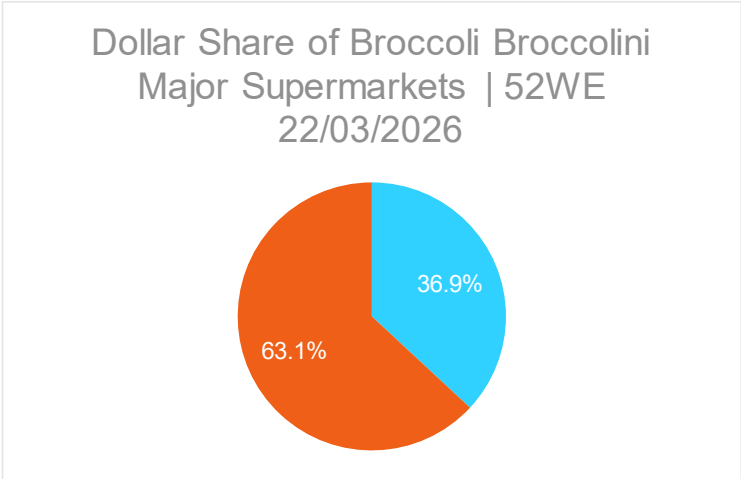
In major supermarkets (Woolworths, Coles, Aldi)



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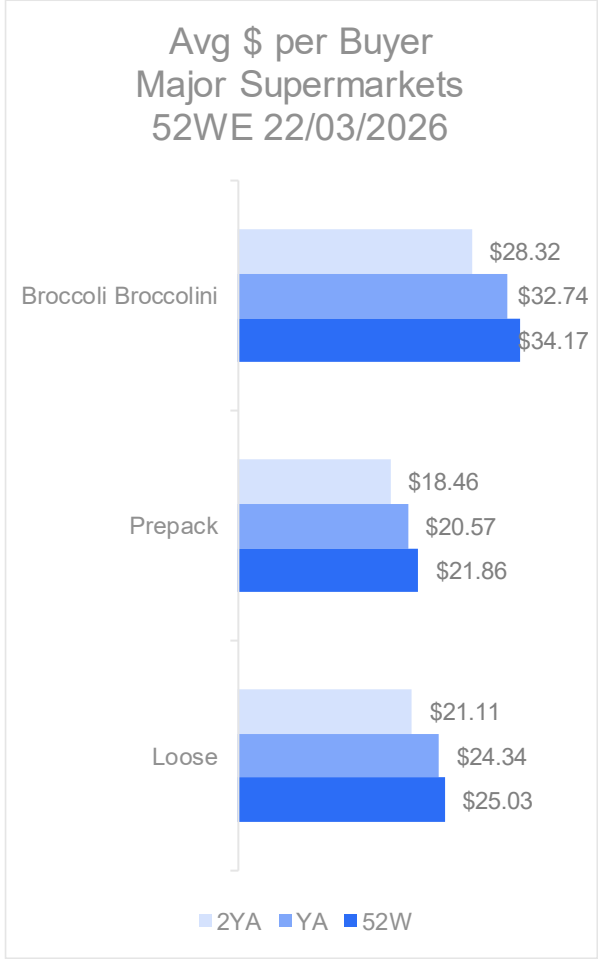
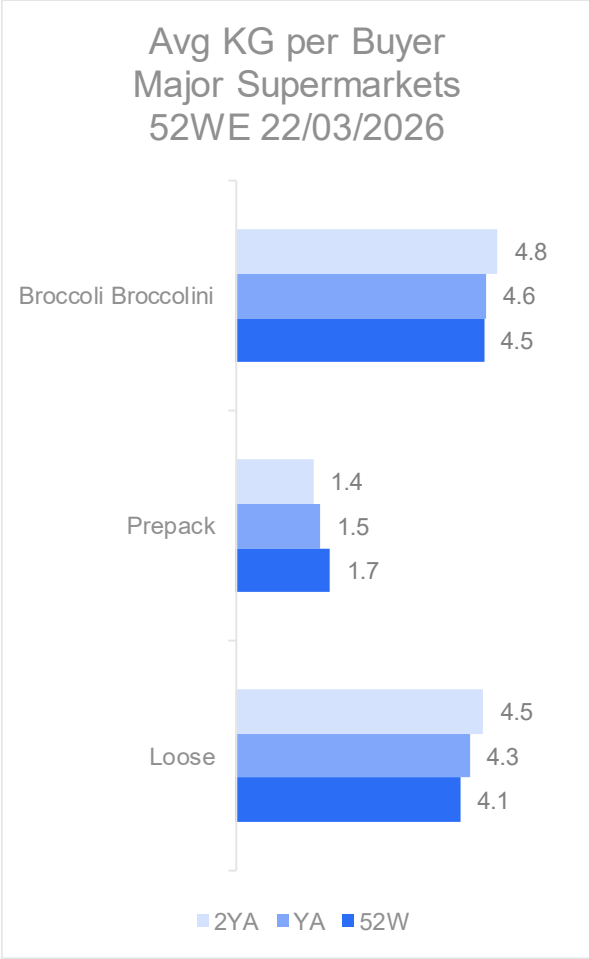
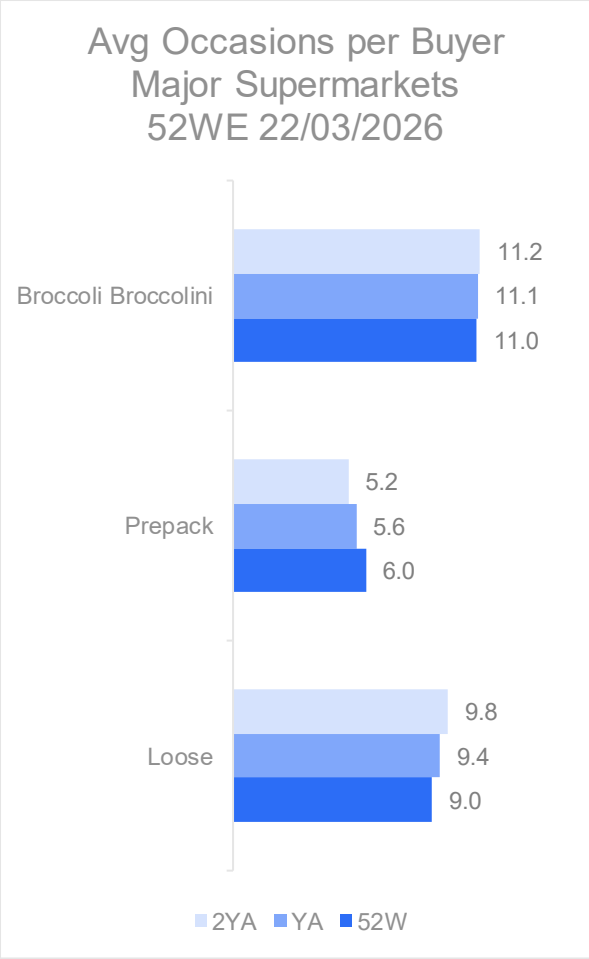
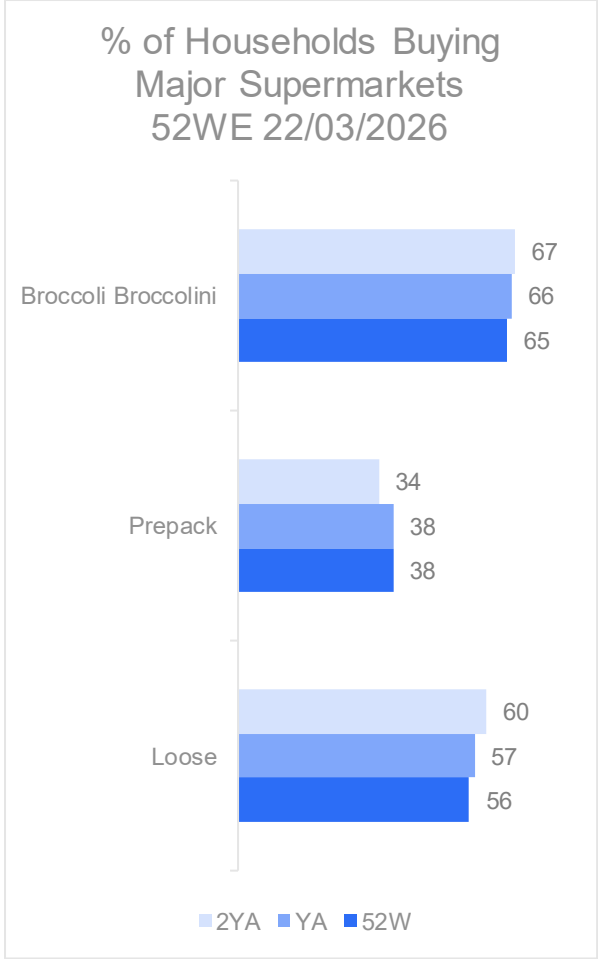
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Across the major supermarkets, volume growth was curbed as a result of loose losses off-setting strong preparked growth this year.



Source: NielsenIQ

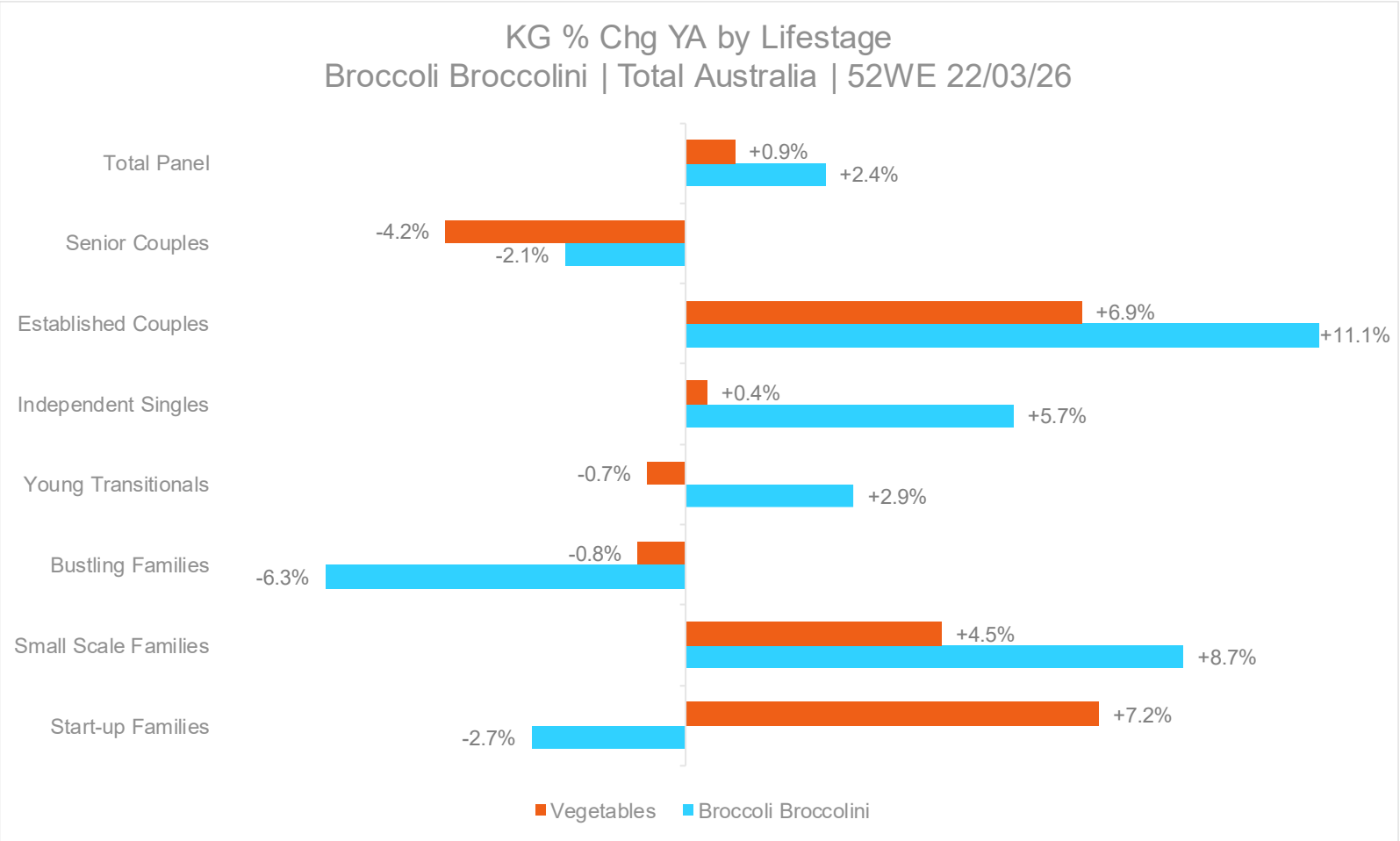
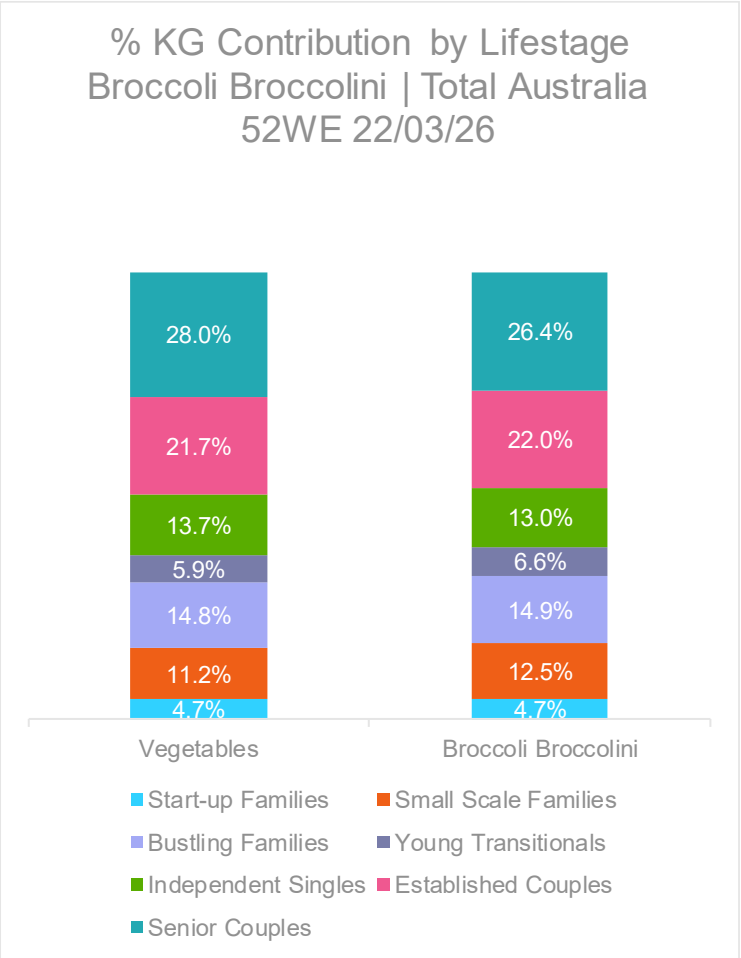
Loose losses are driven by fewer households buying less often, while deeper engagement for prepacked is evident.



Profiling Broccoli/Broccolini Shoppers

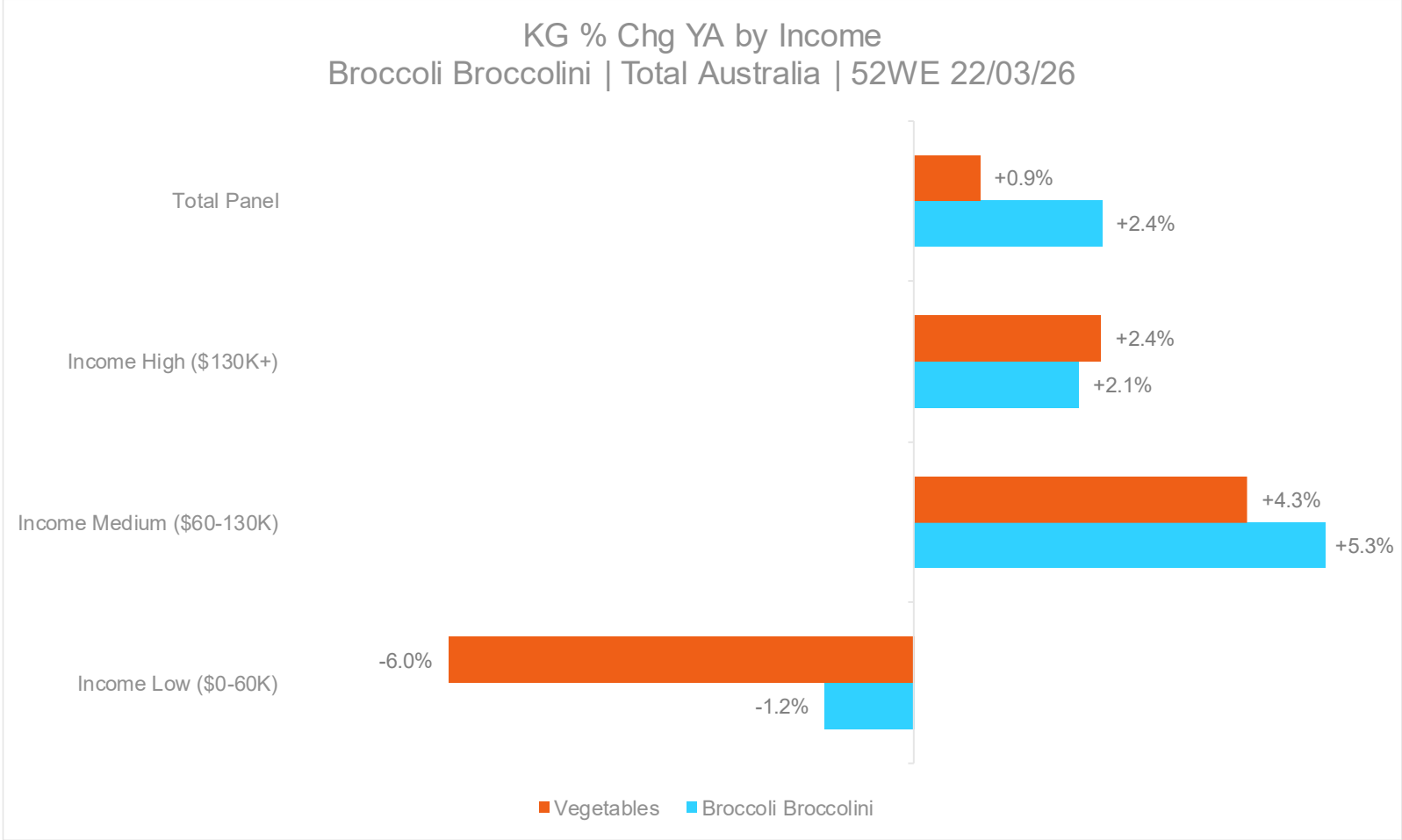
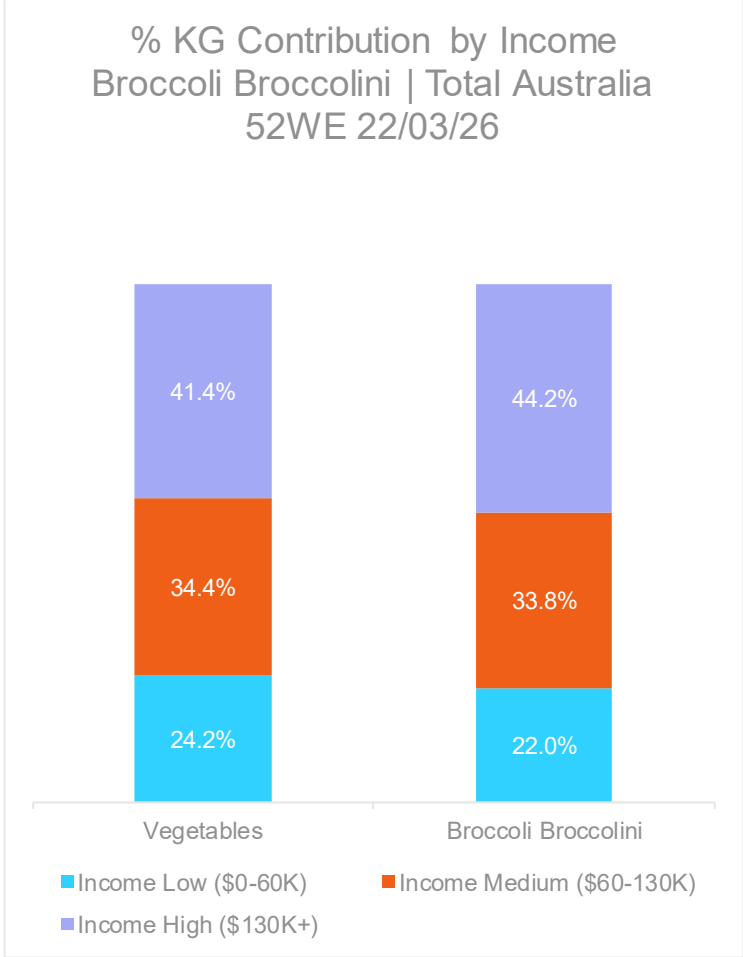


Retail volume growth is evident all household types with the exception of families with babies, families with teenagers and senior couples.



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

Medium and high income households led volume growth however this was countered by losses amongst low income shoppers.



Source: NielsenIQ

Thank you