

Cabbage 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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Analysis Parameters

Time Periods

52 weeks to 19/04/2026

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 Cabbage vs Comparable Vegetables

2 Sales Drivers

3 Retailer Performance

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

5 Profiling Cabbage Shoppers



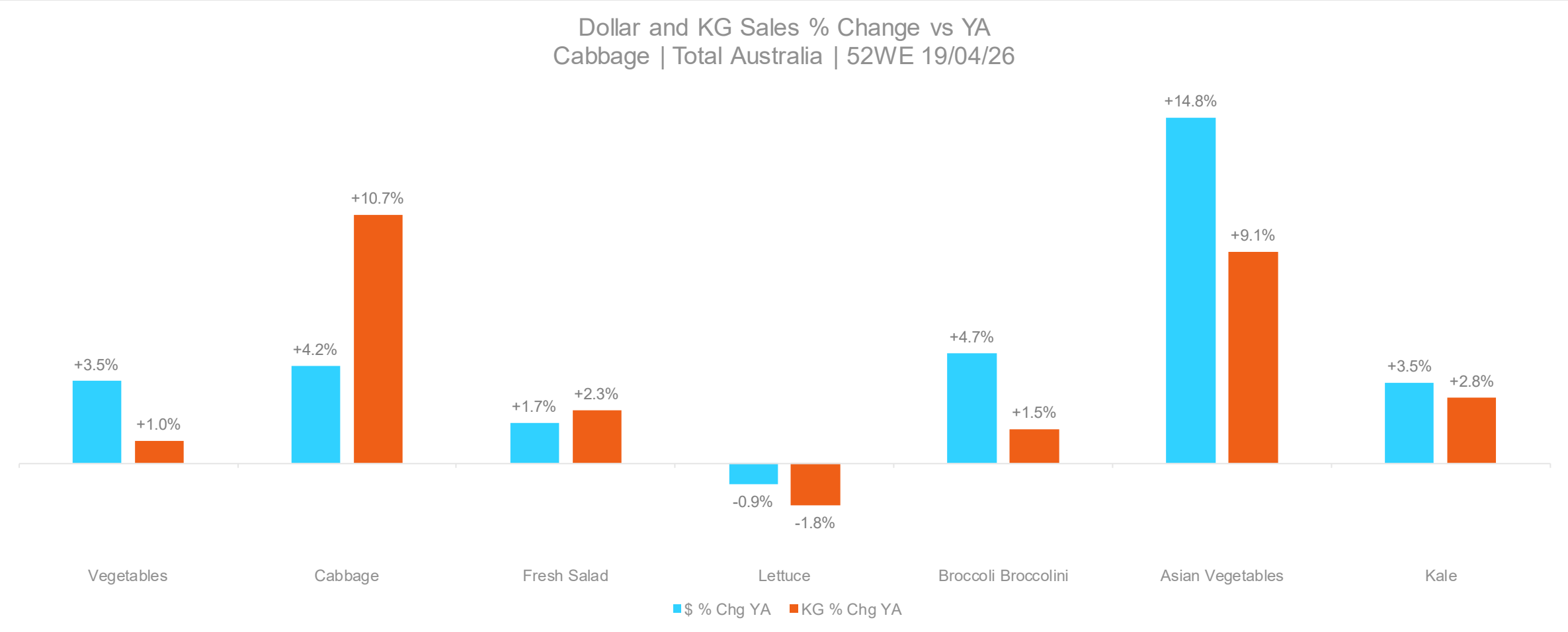
Performance summary – Cabbage

	Key Insights
1 Cabbage vs Comparable Vegetables	<ul style="list-style-type: none">• Cabbage outperformed the market and all comparable vegetables this year, delivering +4.2% dollar sales growth and +10.7% volume growth year on year.• A -6% price drop unlocked demand, supporting volume growth.
2 Sales drivers	<ul style="list-style-type: none">• Growth was largely buyer led, as new shoppers entered the category, elevating household penetration levels to 51%.• Stronger engagement resulted in shoppers purchasing an additional 200g this year.
3 Retailer Performance	<ul style="list-style-type: none">• Non major supermarkets were the growth engine, as major supermarket performance lagged this year.
4 Format Performance	<ul style="list-style-type: none">• Loose cabbage drove dollar sales growth across major supermarkets this year – while volumes were softer across both formats, prepacked losses were most pronounced.
5 Profiling Cabbage Shoppers	<ul style="list-style-type: none">• Demand strengthened across all household groups this year, with the strongest response amongst start-up and bustling families, singles, and established couples.
What does this mean?	<ul style="list-style-type: none">• With price-led demand delivering more shoppers, continued growth will depend on maintaining value, accessibility and encouraging regular inclusion of cabbage in everyday meals.

Cabbage vs Comparable Vegetables

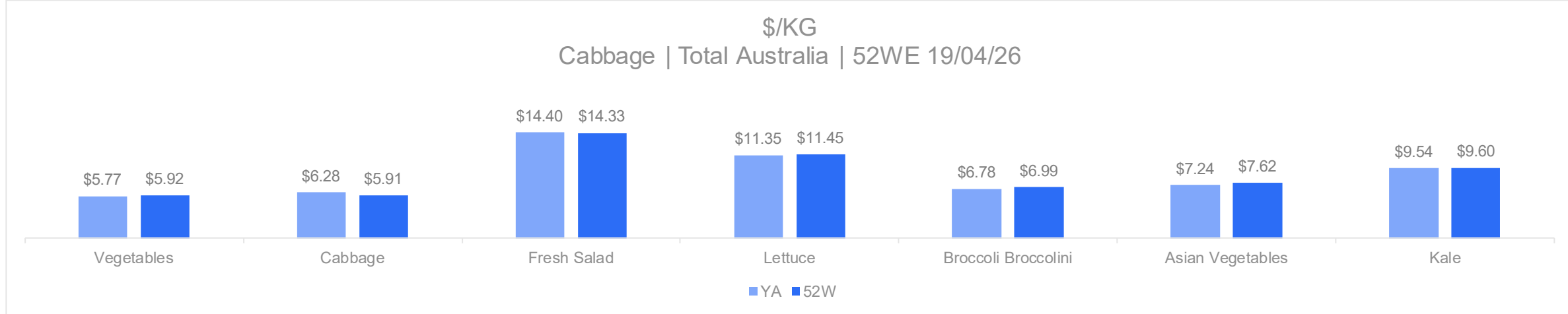
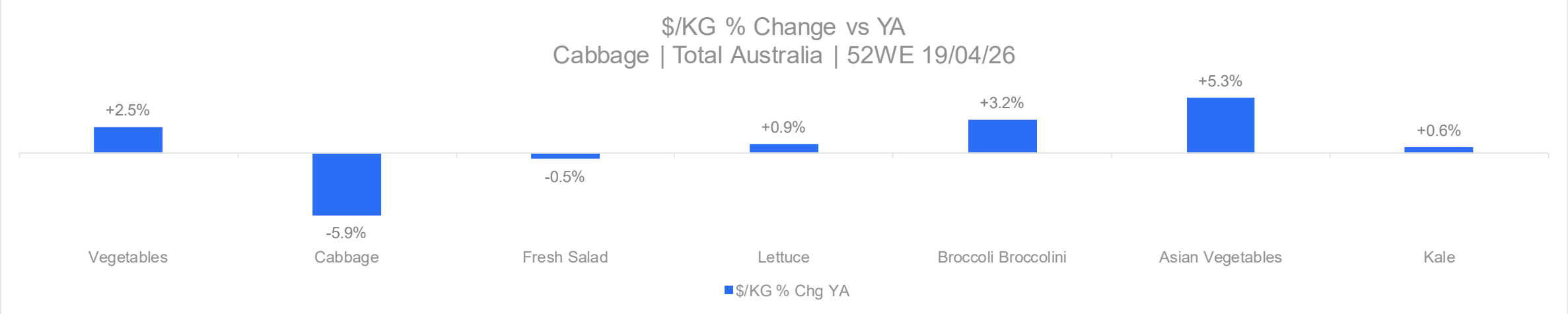


Outperforming total market and comparable vegetables, cabbage dollar sales grew by +4.2% year on year, accompanied by retail volume growth of +10.7%.



Source: NielsenIQ

Lower prices supported volume growth for cabbage, with the average price per kilogram dropping by -6% year on year.

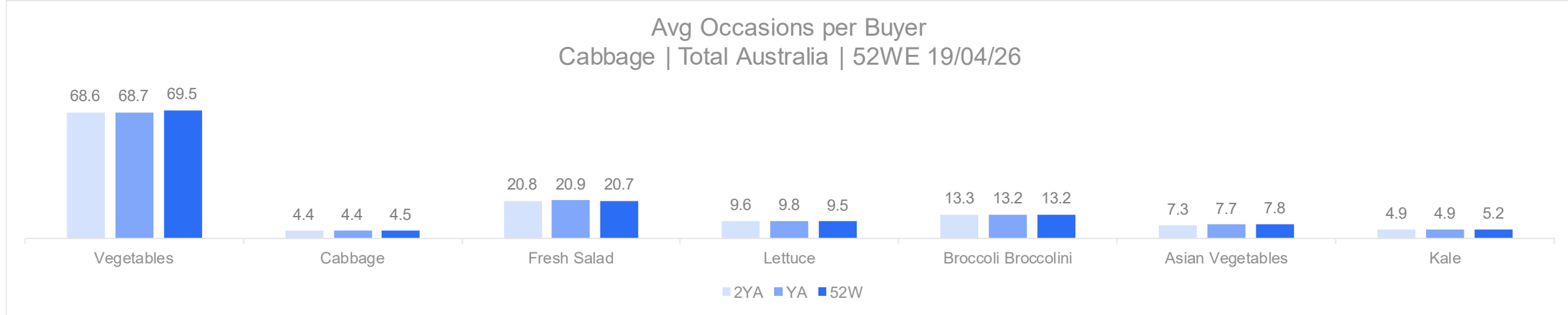
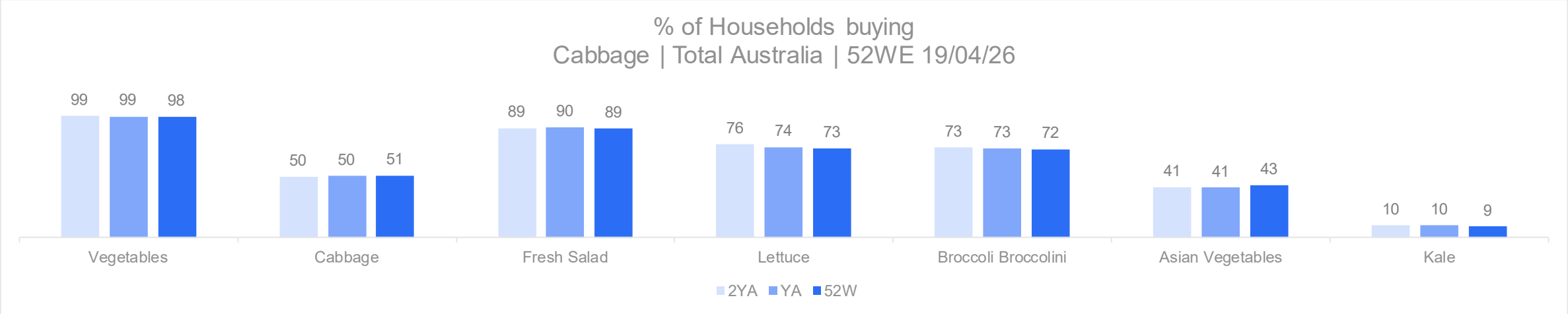


Source: NielsenIQ

Sales Drivers

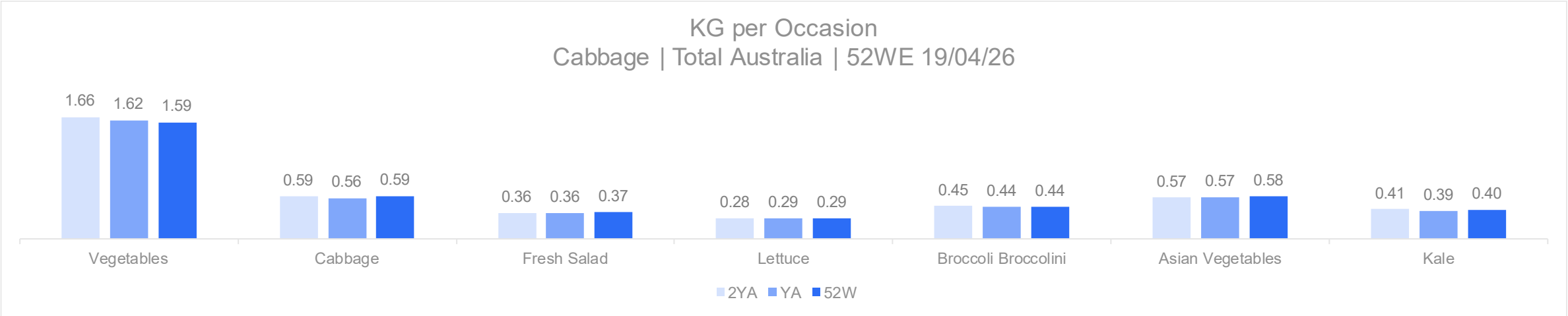
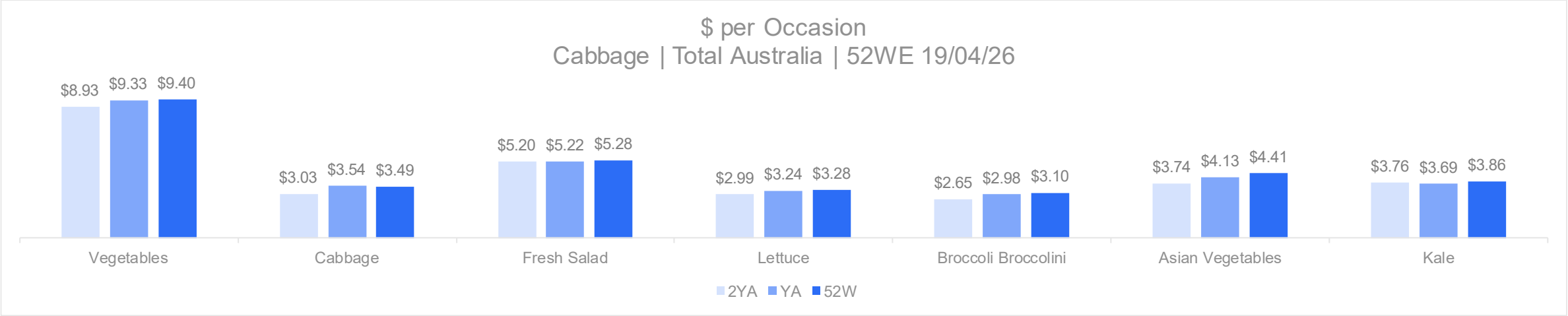


Cabbage growth was largely buyer led, as penetration levels elevated to 51% this year.



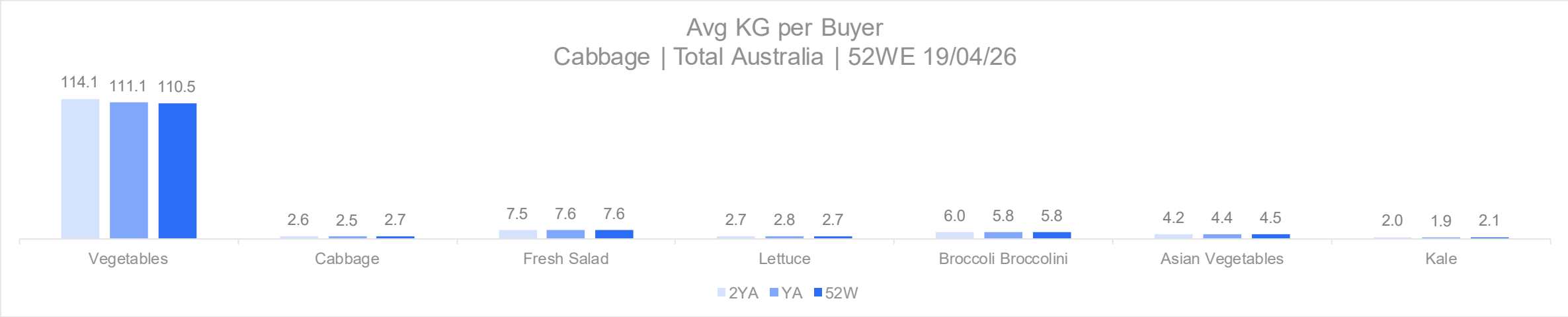
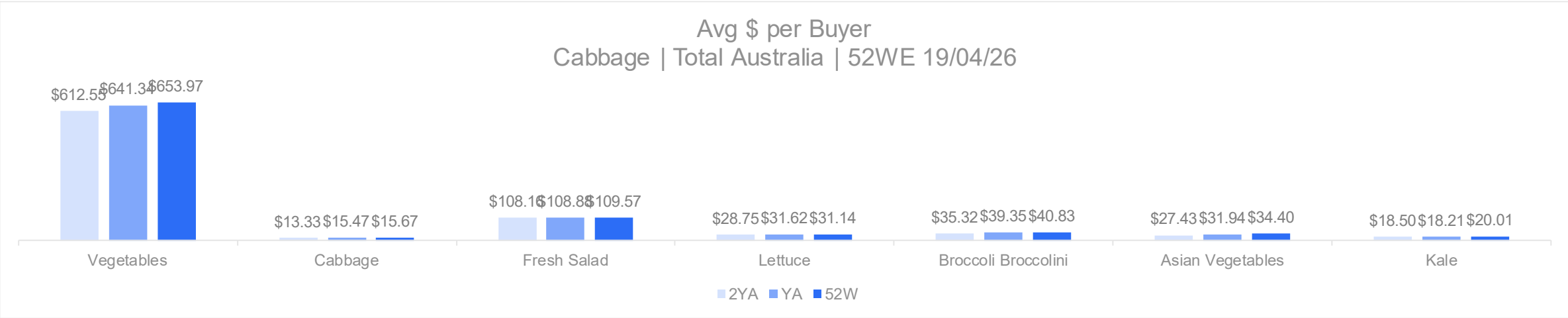
Source: NielsenIQ

Lower prices encouraged slightly heavier baskets compared to one year ago.



Source: NielsenIQ

As a result, cabbage annual purchase volumes lifted by 200g per household.

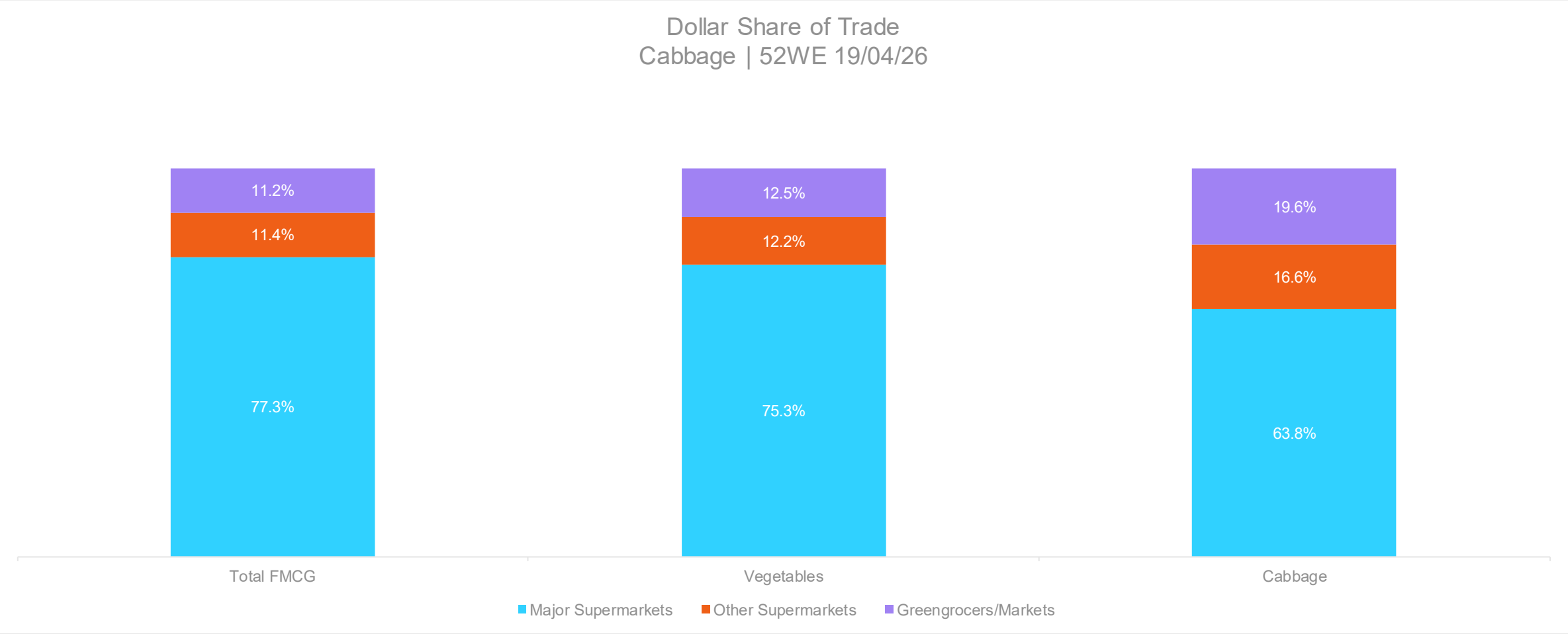


Source: NielsenIQ

Retailer Performance

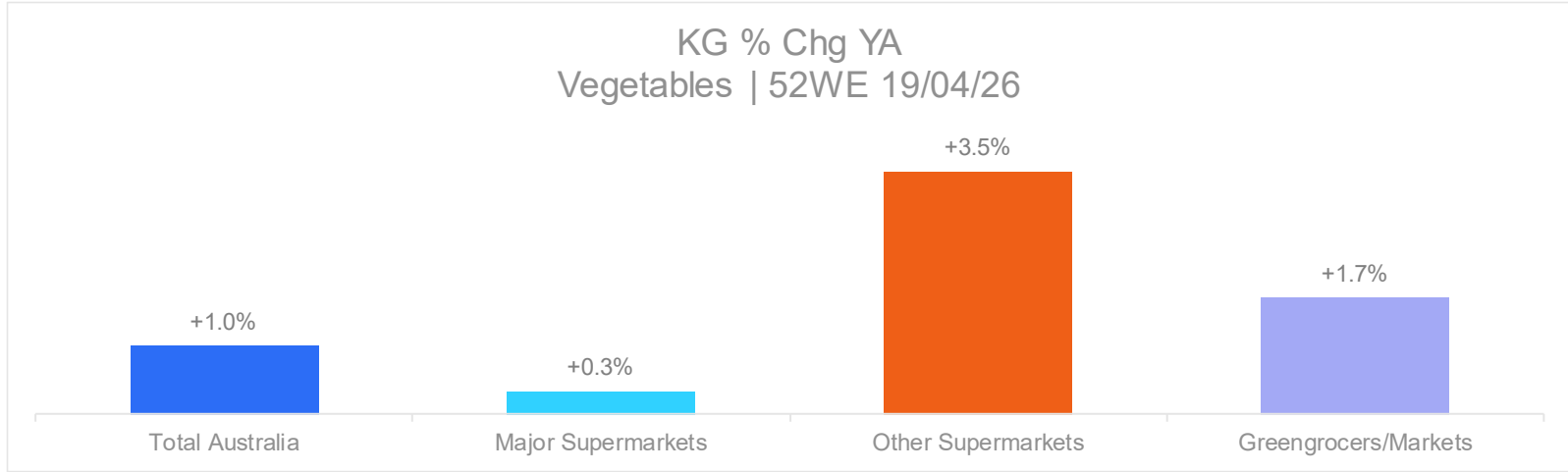
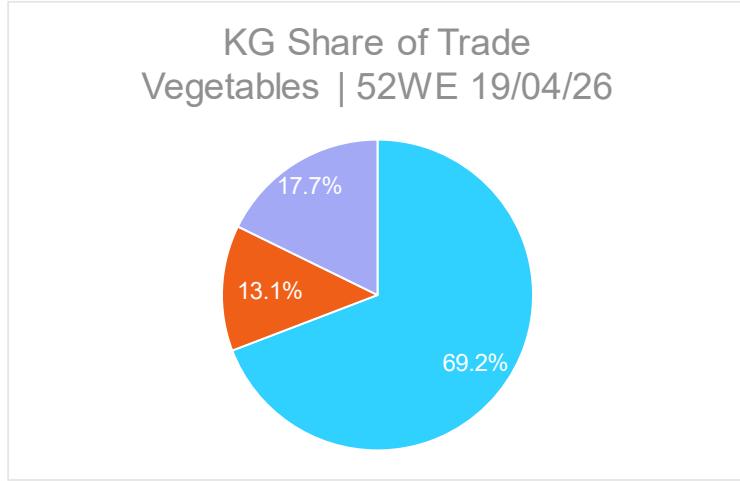
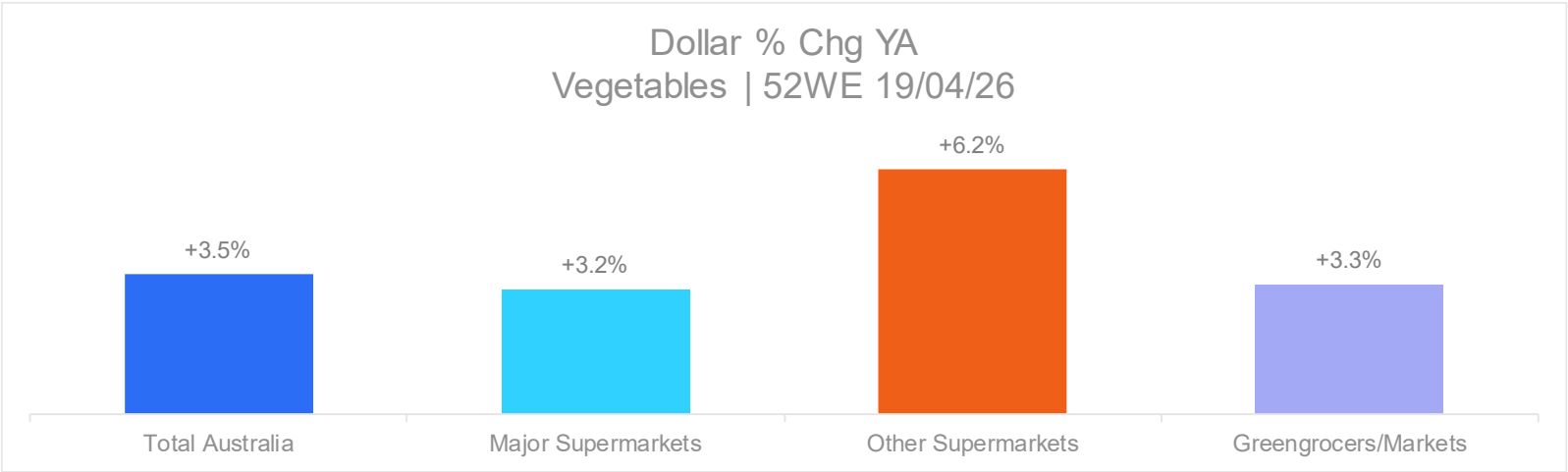
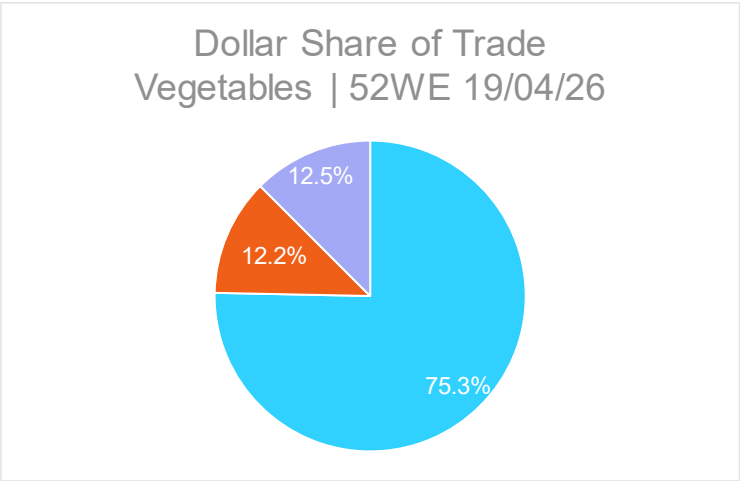


Relative to their share of total grocery and fresh vegetables, major supermarkets under-trade in cabbage sales.



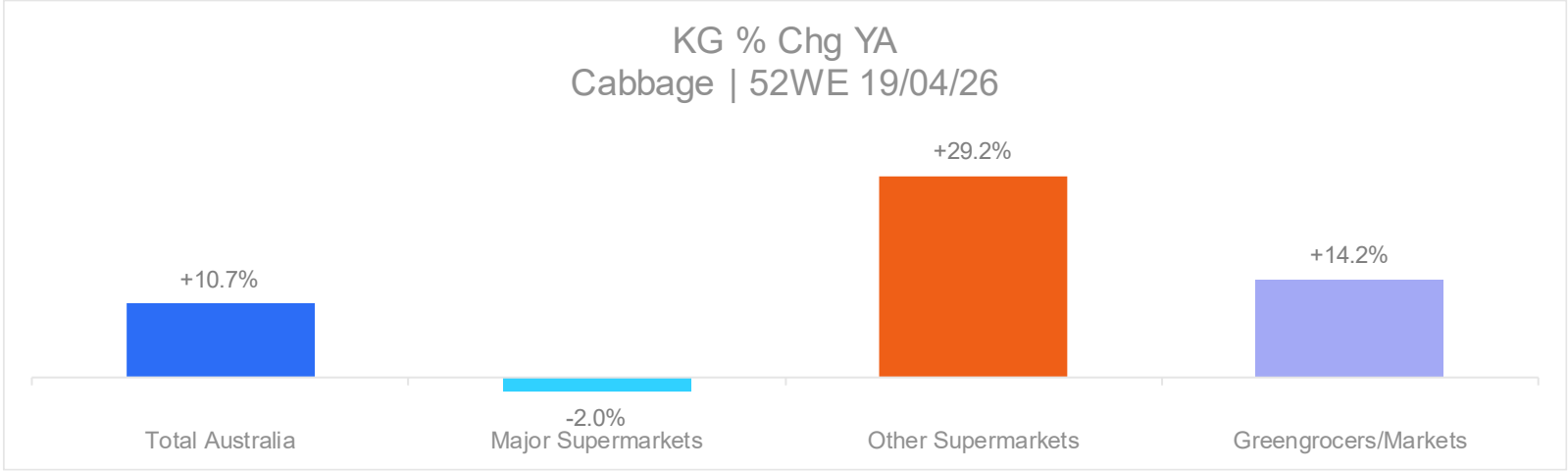
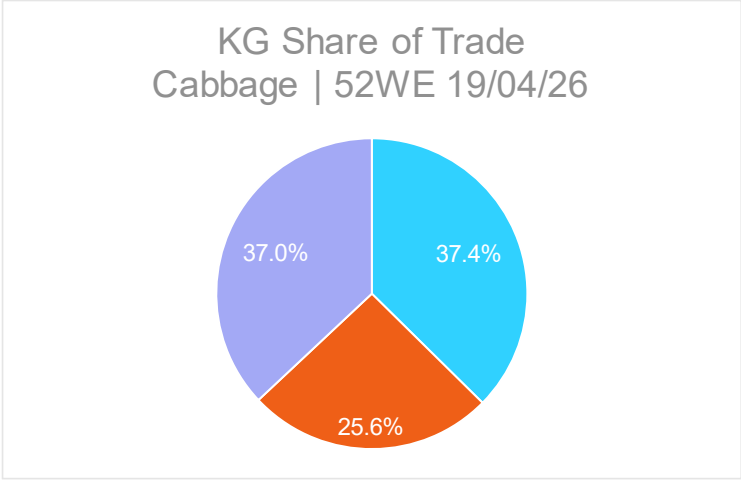
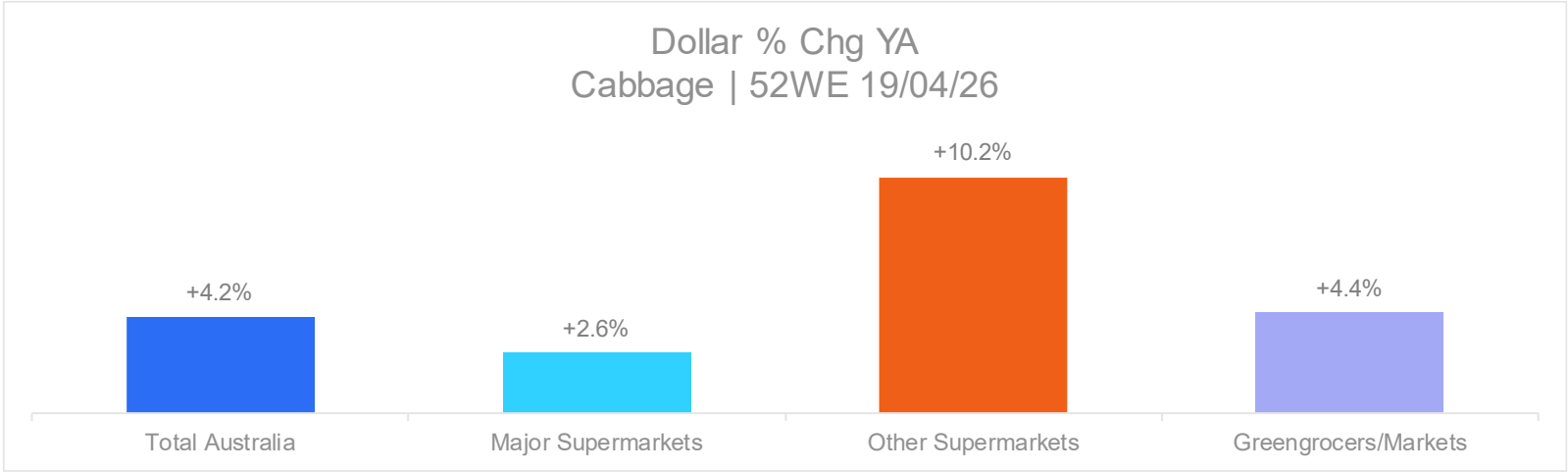
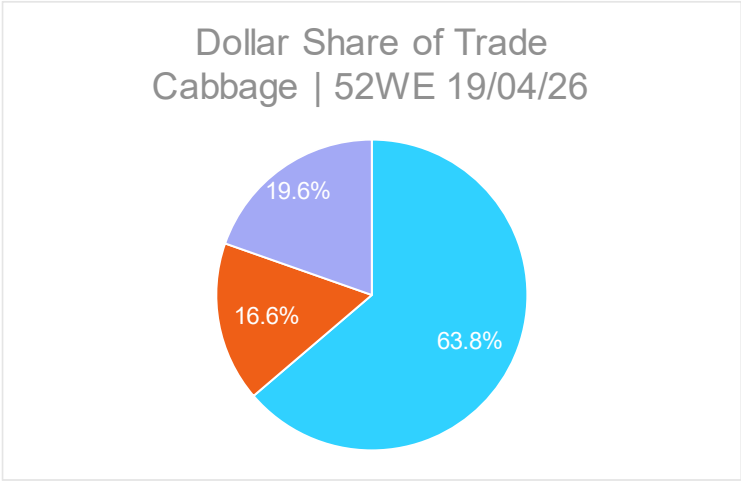
Source: NielsenIQ

Fresh vegetable sales growth continues to be led by the non major supermarkets.



Source: NielsenIQ

This is also the case for cabbage, with the non majors driving volume growth, as major supermarket performance lags.



Source: NielsenIQ

Format Performance

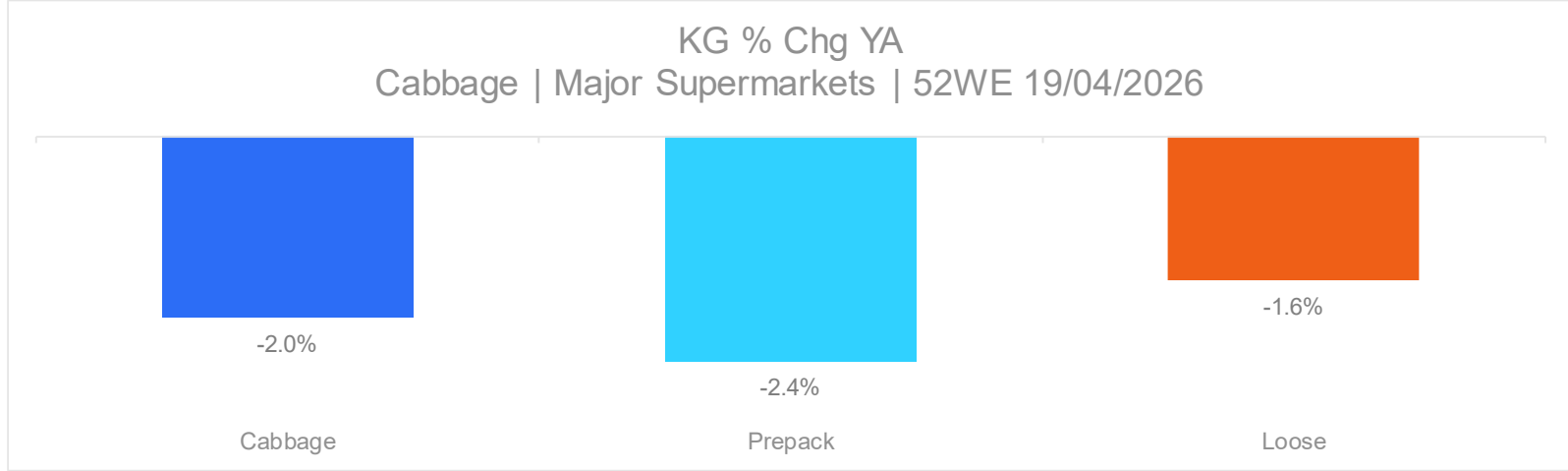
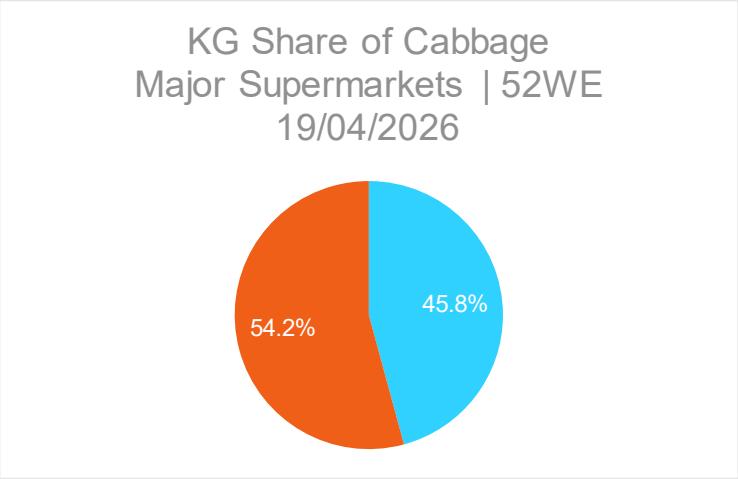
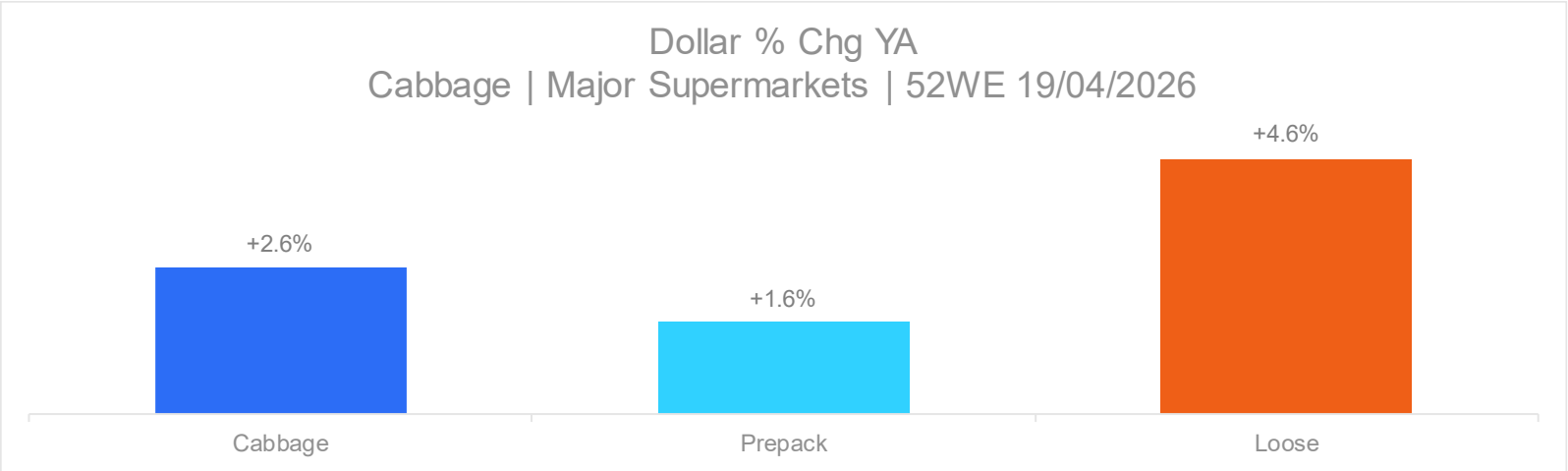
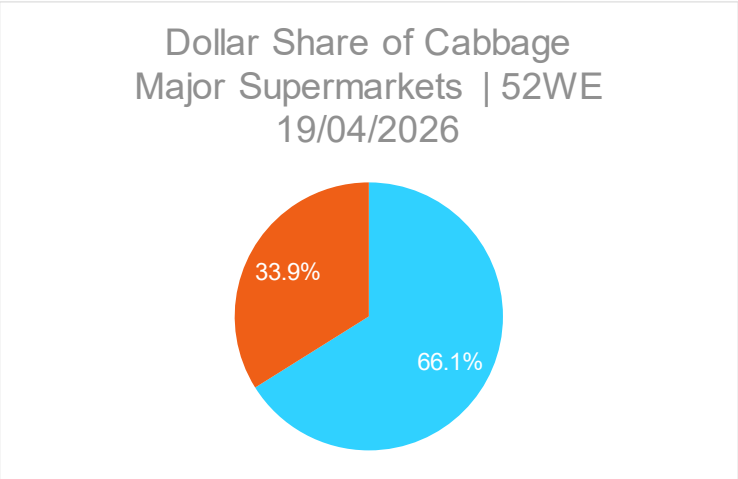
In major supermarkets (Woolworths, Coles, Aldi)



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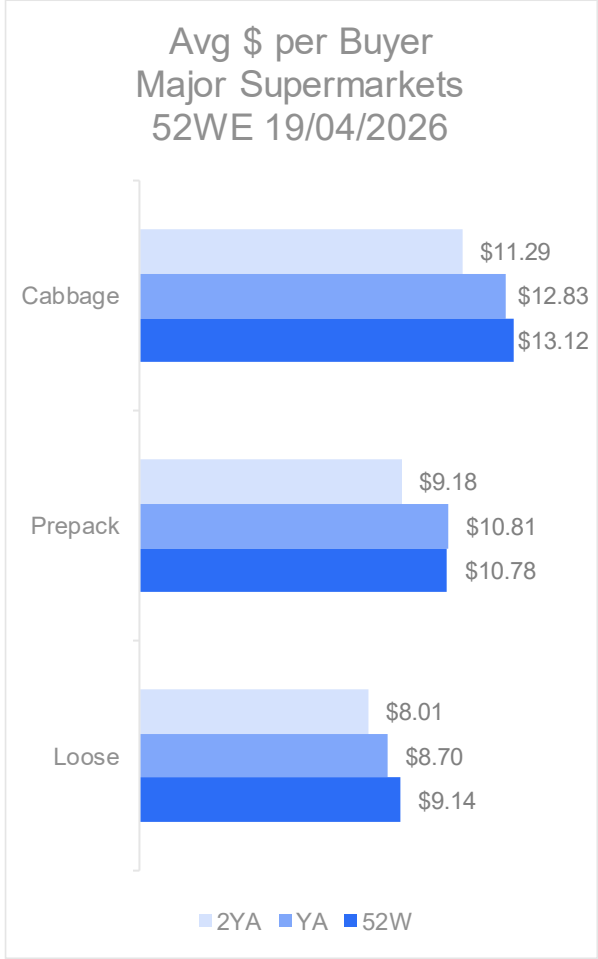
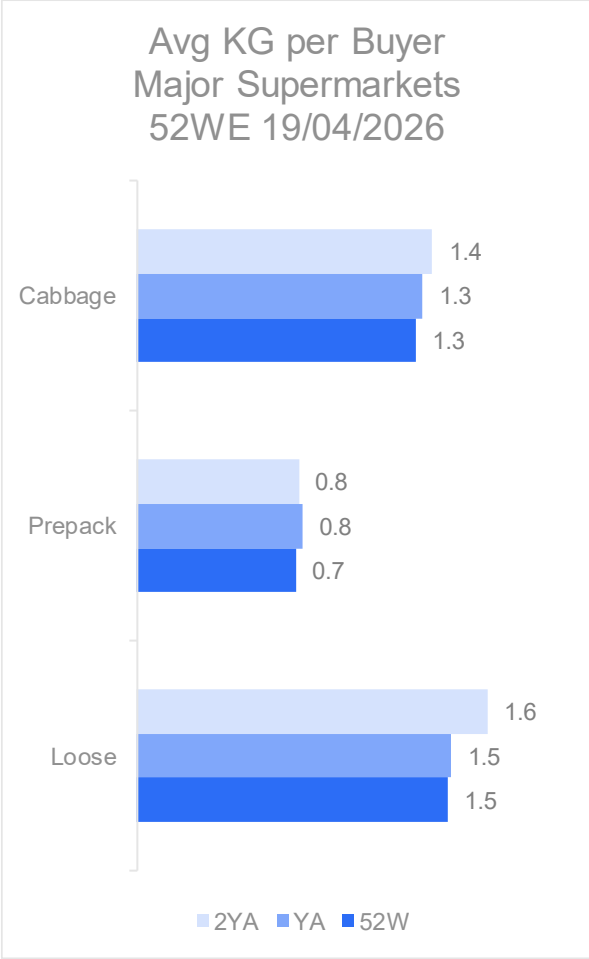
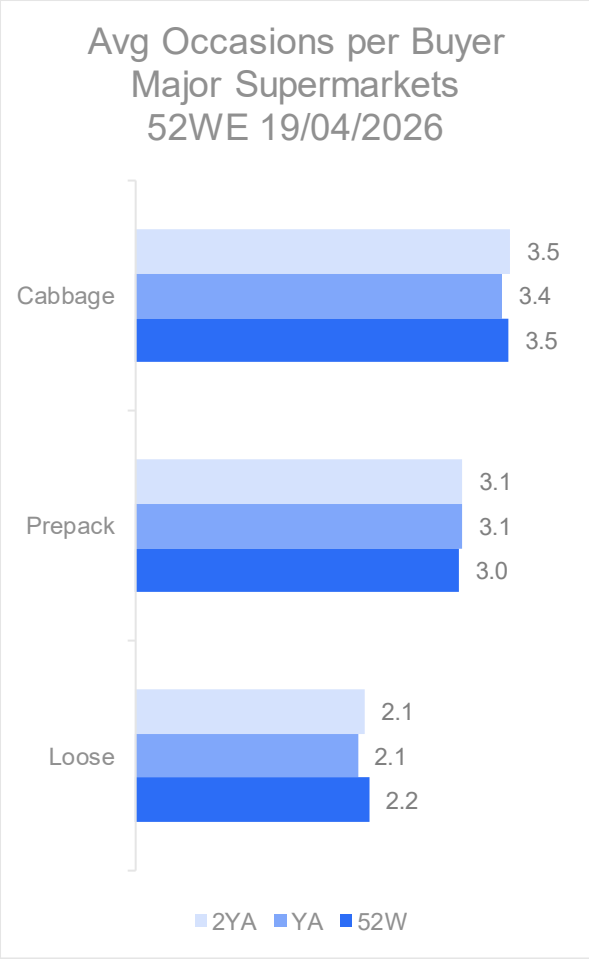
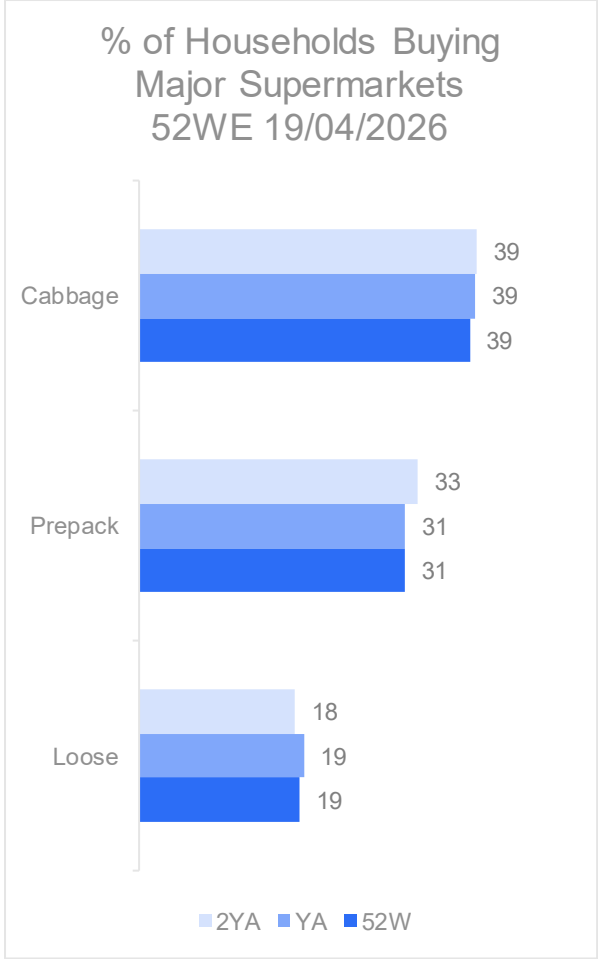
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Loose cabbage led dollar sales growth across major supermarkets however volumes are behind last year across both formats.



Source: NielsenIQ

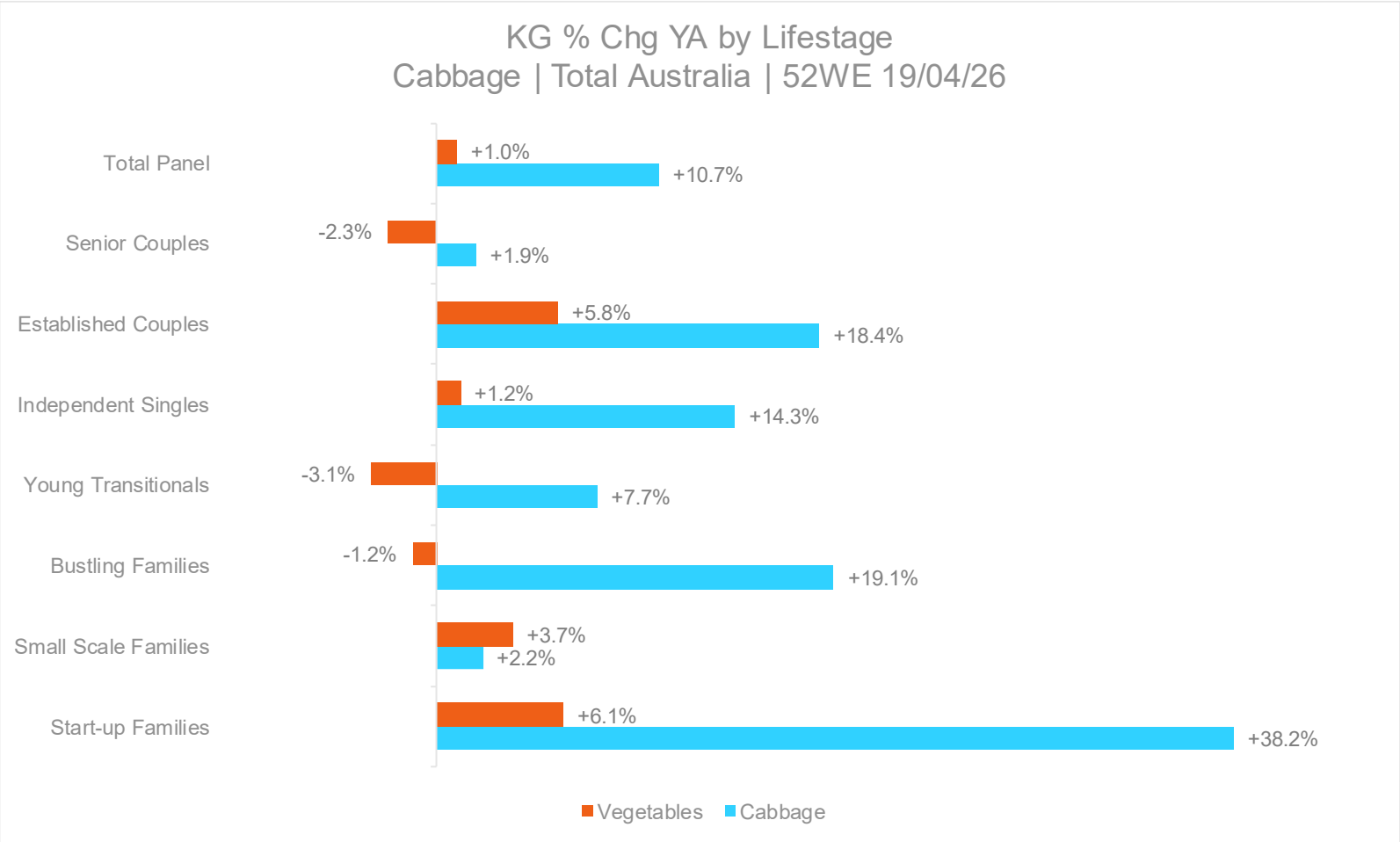
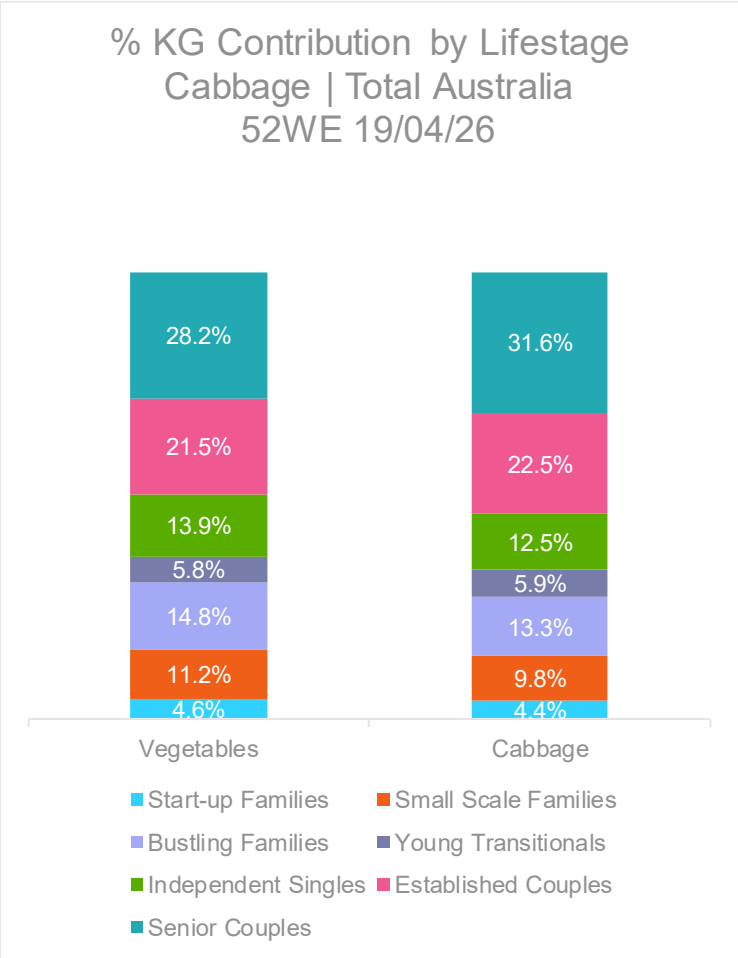
Penetration levels remained stable across both formats this year.



Profiling Cabbage Shoppers

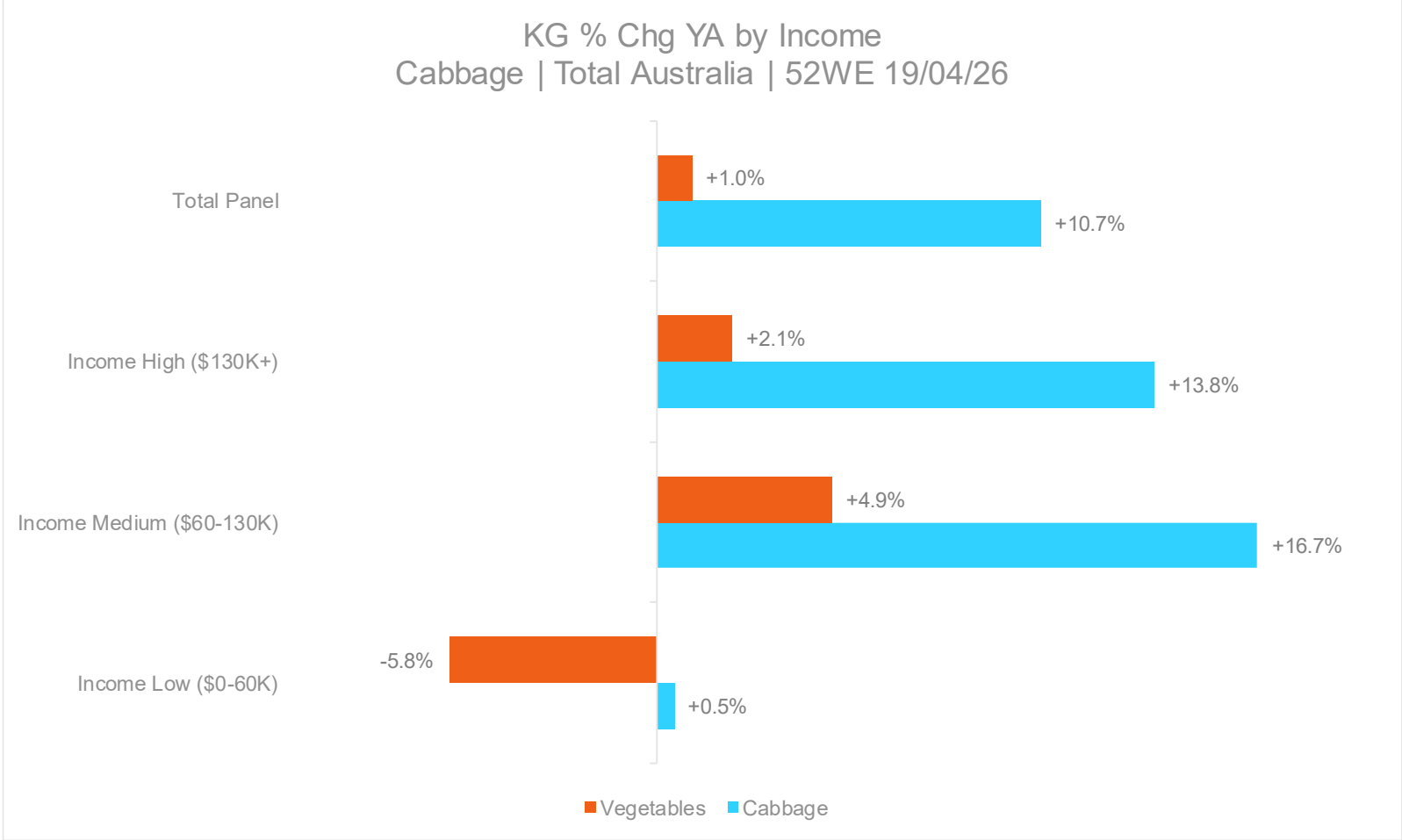
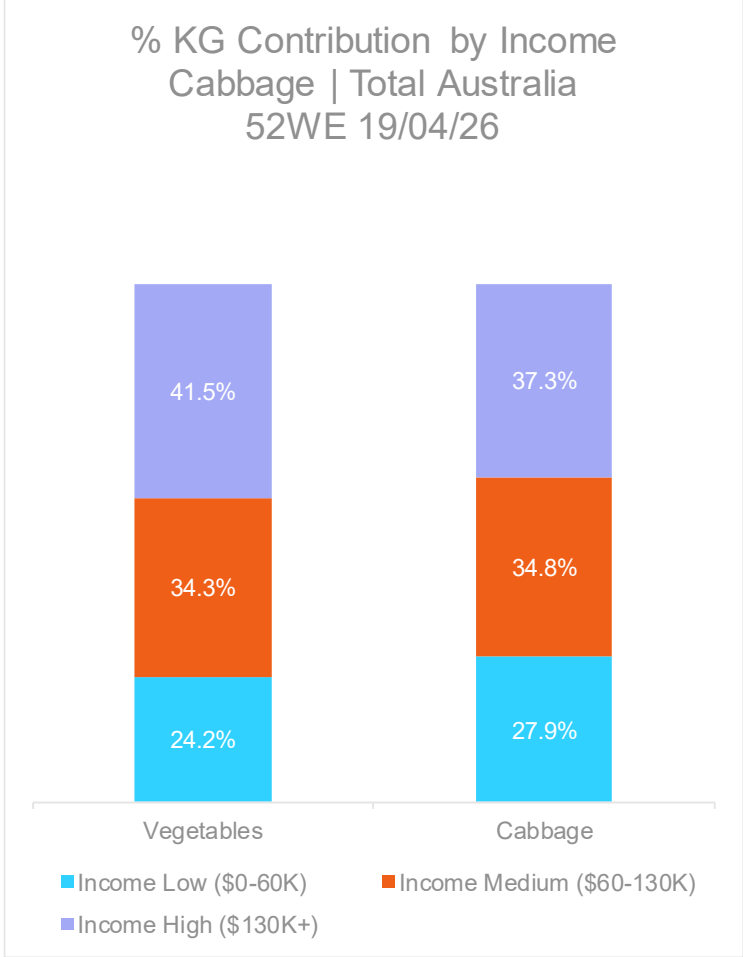


Cabbage sales growth is evident across all household groups this year but key drivers were start-up and bustling families, singles and established couples.



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

In terms of income, high and medium groups led volume growth this year.



Source: NielsenIQ

Thank you