Pumpkin Comprehensive Review 2026

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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%.

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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	**Pumpkin vs Comparable Vegetables**
2	**Sales Drivers**
3	**Retailer Performance**
4	**Format Performance** In major supermarkets (Woolworths, Coles, Aldi)
5	**Profiling Pumpkin Shoppers**

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Performance Summary – Pumpkin

	Key Insights
1 Pumpkin vs Comparable Vegetables	• Pumpkin retail volumes grew modestly at +1.0% year on year, broadly aligned with the market average, while dollar sales declined by -7.5% • Dollar sales declines were driven by price deflation (-8.5%), however, this did not appear to stimulate demand • Among comparable vegetables, eggplant and sweet potato were the only categories to deliver stronger volume growth
2 Sales drivers	• Purchase frequency levels remain stable at 7 trips per household per year while penetration softened to 64% • Lower prices resulted in a drop in annual spend levels, while purchase volumes remained stable at ~7.9kg, per household
3 Retailer Performance	• Pumpkin dollar sales declined across all retail channels, in contrast to total vegetables • Major supermarkets and greengrocers/markets maintained volumes, cushioning the category from steeper declines • Non-major supermarkets recorded the steepest dollar sales losses, alongside a small drop in volume, acting as the primary drag on category performance
4 Format Performance	• In major supermarkets, prepacked pumpkin delivered healthy volume growth, while loose pumpkin volumes declined, offsetting prepacked gains • Prepacked growth was driven by buyer expansion, whereas loose pumpkin suffers ongoing penetration losses
5 Profiling Pumpkin Shoppers	• Volume growth was uneven by household type, with gains from established couples and families with babies and very young children offset by declines all other groups
What does this mean?	• Dollar sales losses have been driven by price deflation, without a corresponding uplift in demand. Stable frequency but falling penetration indicates the category is losing shoppers, rather than improving relevance and usage • Prepacked pumpkin is the only clear growth lever, supported by buyer expansion, while loose continues to erode category performance • Affordability alone has not stimulated demand, particularly among low-income and younger households, highlighting a need to address relevance, usage and format accessibility, not price alone

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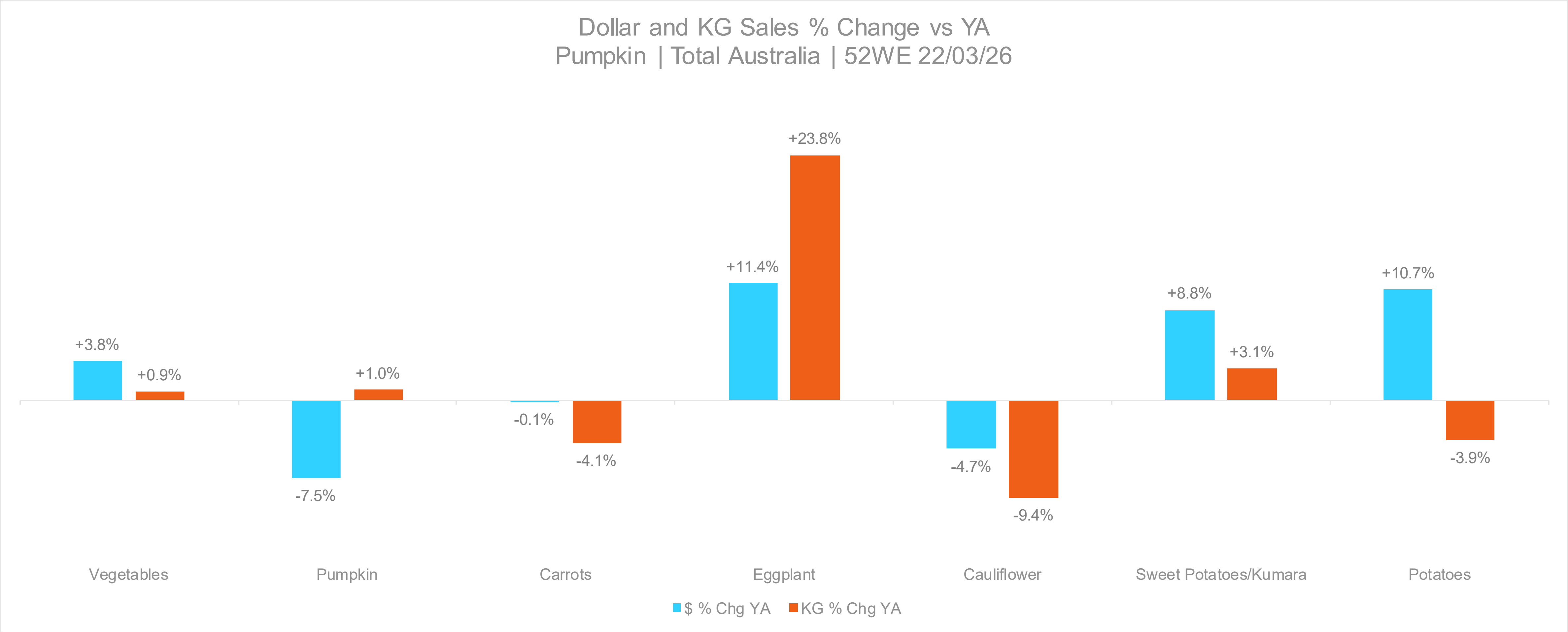
Pumpkin vs Comparable Vegetables

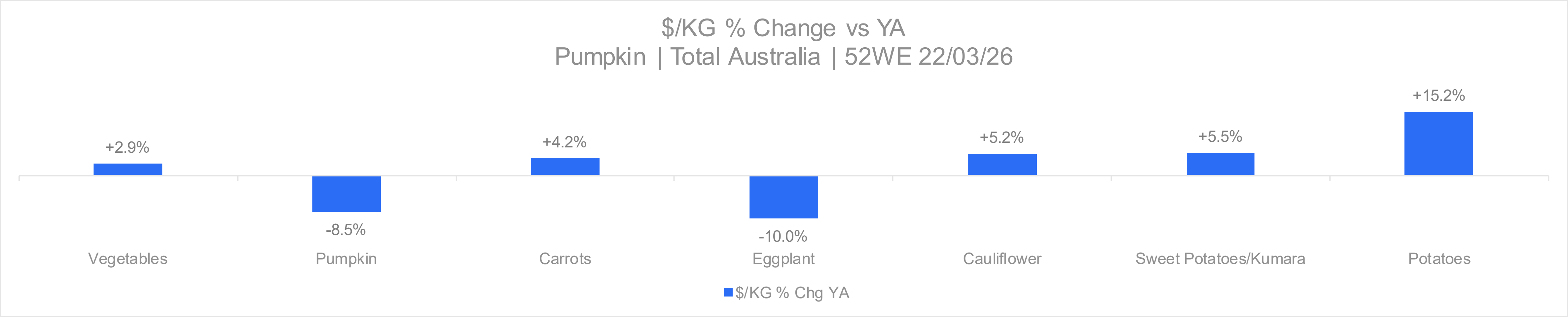
With modest volume growth of +1% year on year, pumpkin results are aligned with the market average however dollar sales declined by -7.5%.

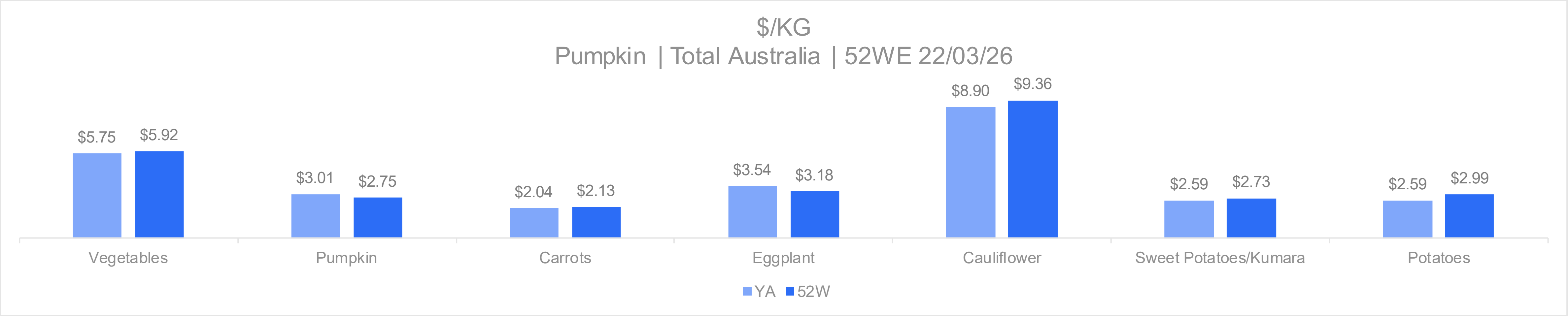
Among comparable vegetables, eggplant is the stand-out, with double digit dollar sales and volume growth this year.



Source: NielsenIQ

Dollar sales losses were driven by price deflation of -8.5%, this did not however propel demand/positively impact volume growth, like eggplant.



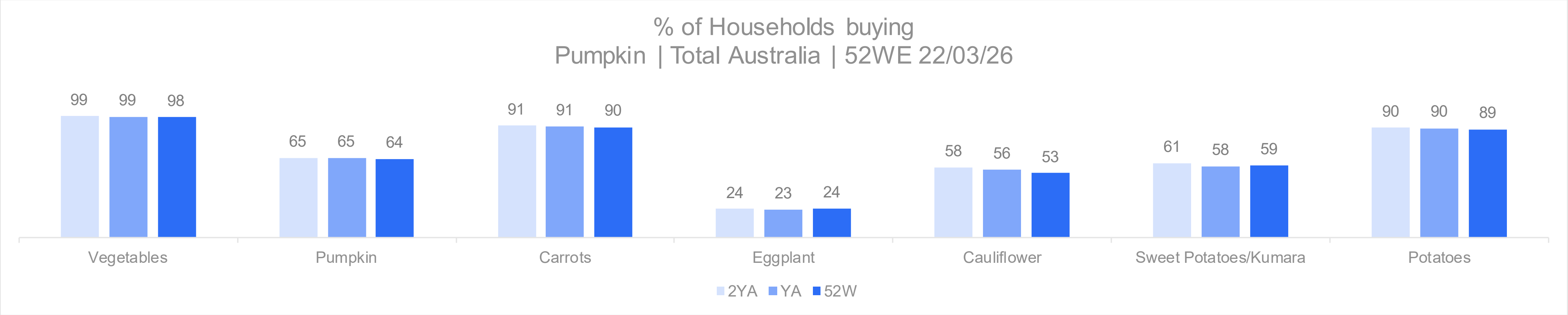


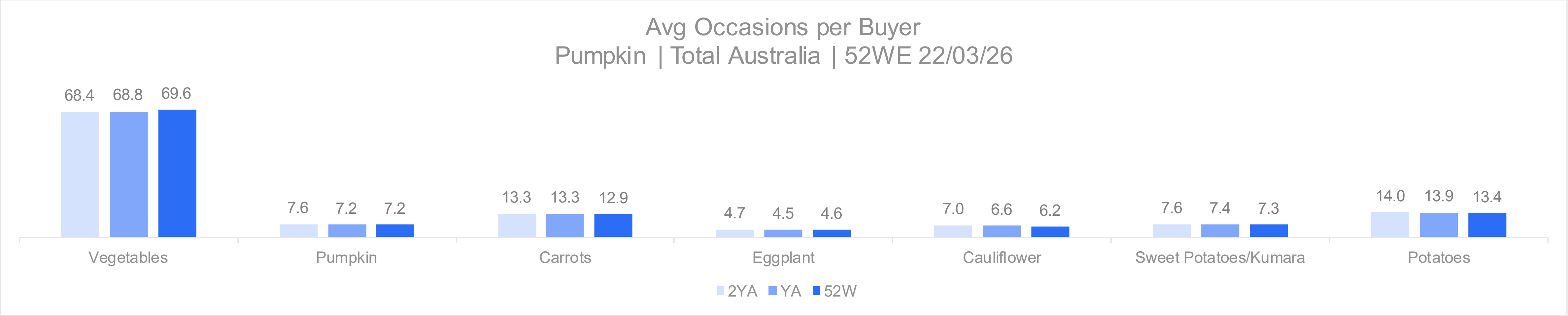
Source: NielsenIQ

Sales Drivers

Like most comparable vegetables, pumpkin penetration softened this year, dropping to 64%.

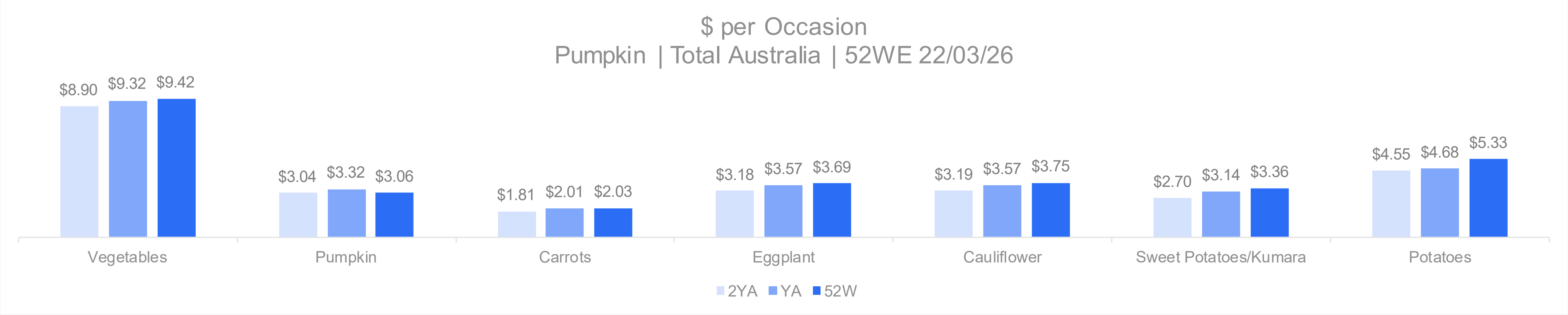
Purchase frequency levels remain stable, at 7 occasions per annum.

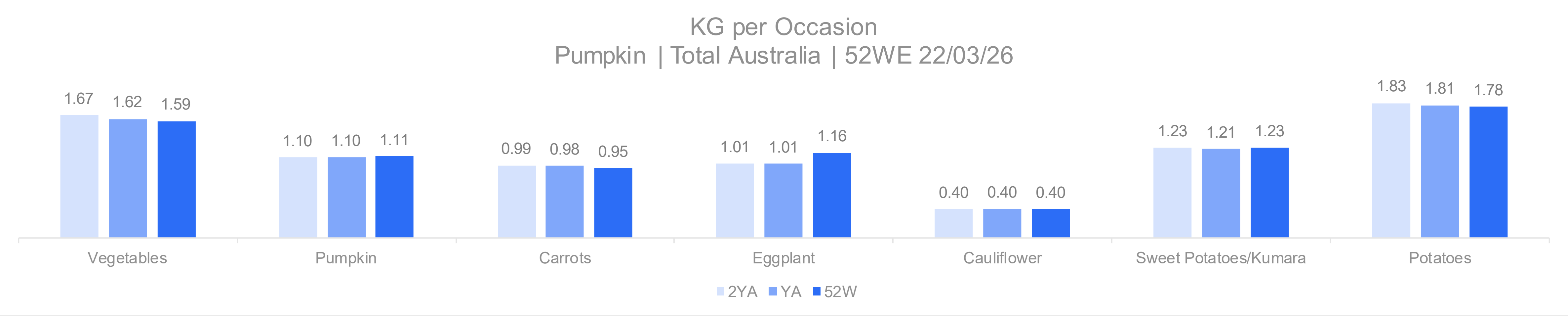




Source: NielsenIQ

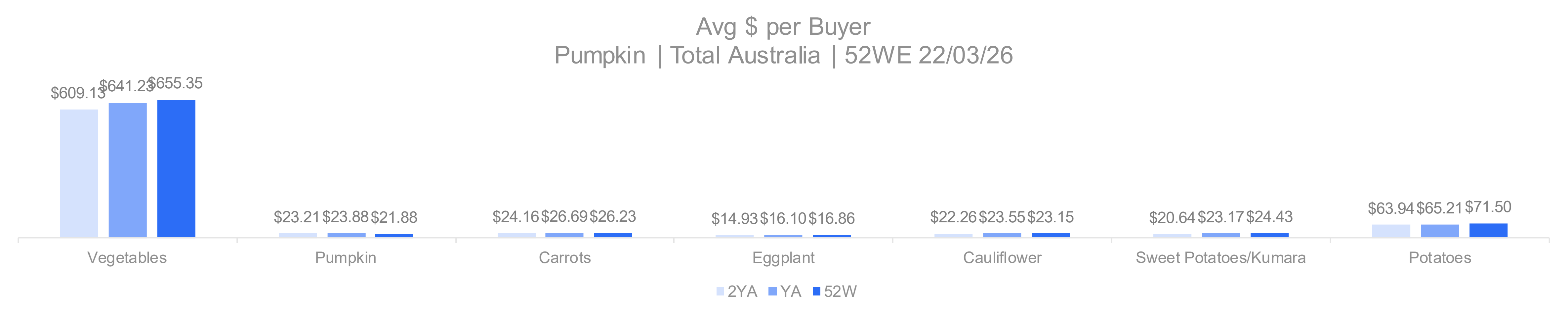
In line with lower prices, pumpkin shoppers spent slightly less per trip this year.

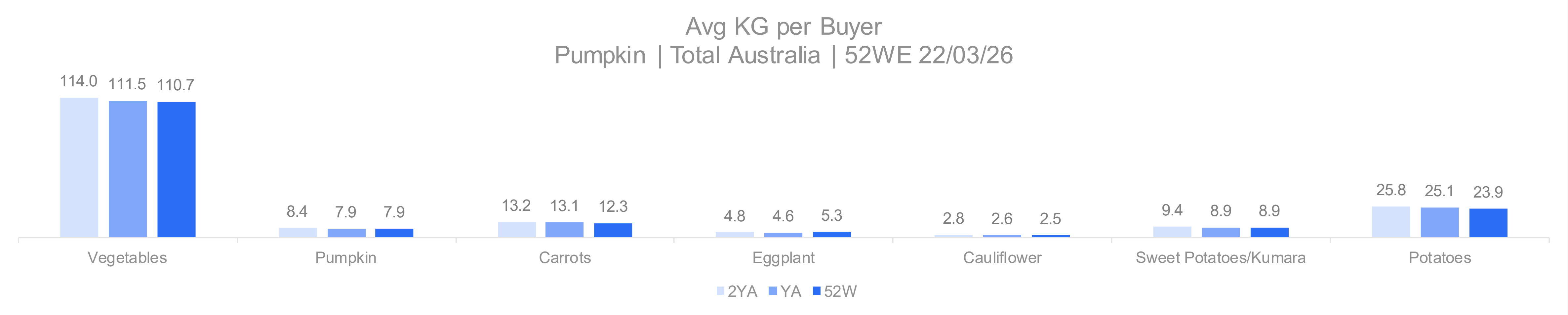




Source: NielsenIQ

Resulting in annual spend levels dropping but at 7.9kg, average purchase volumes remain stable.

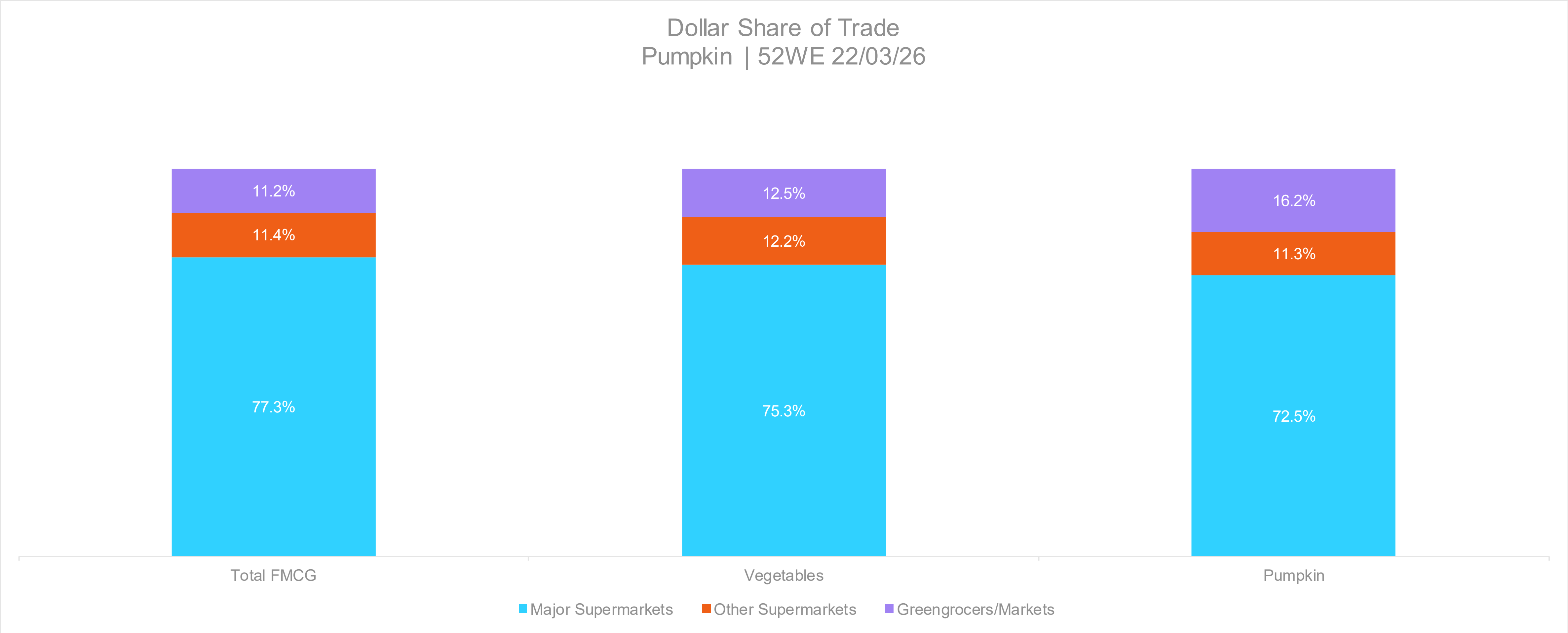




Source: NielsenIQ

Retailer Performance

Major supermarkets under-trade in pumpkin sales when compared to their share of total grocery and fresh vegetables.

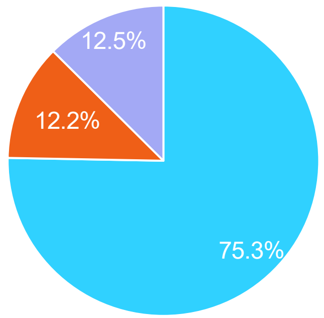


Source: NielsenIQ

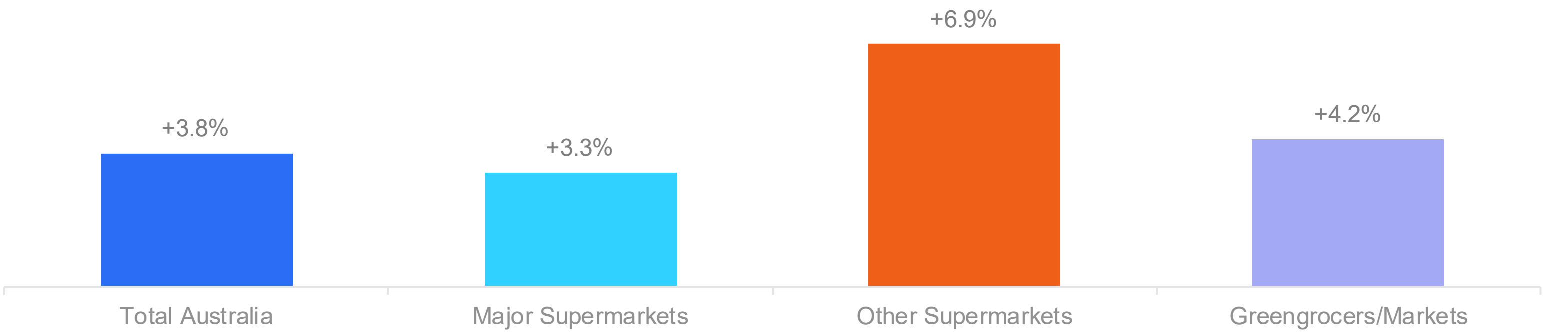
As the fastest growing retail channel, non-major supermarkets are a key driver of fresh vegetable dollar sales and volume growth this year.

Major supermarket retail volumes are flat vs last year however.

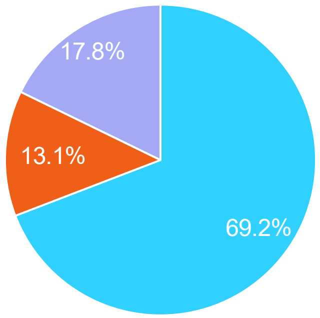
Dollar Share of Trade
Vegetables | 52WE 22/03/26



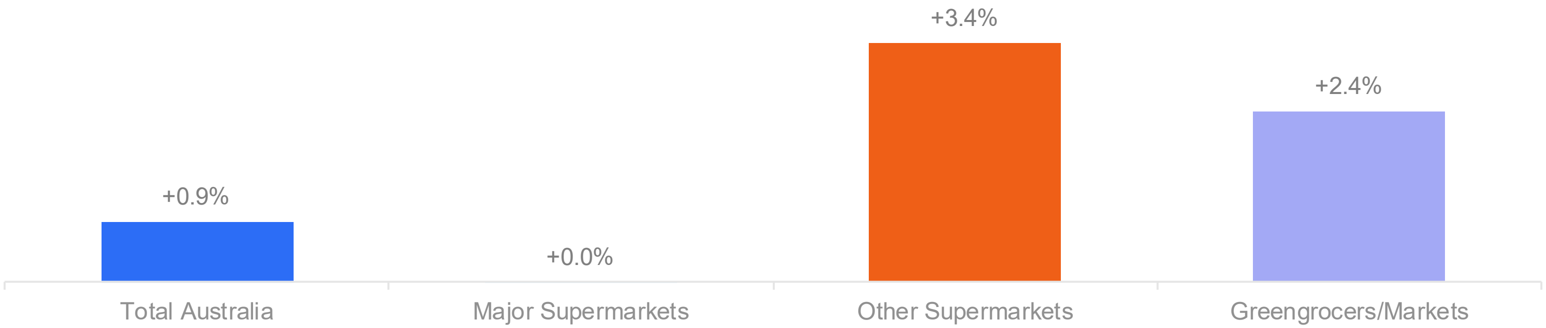
Dollar % Chg YA
Vegetables | 52WE 22/03/26



KG Share of Trade
Vegetables | 52WE 22/03/26

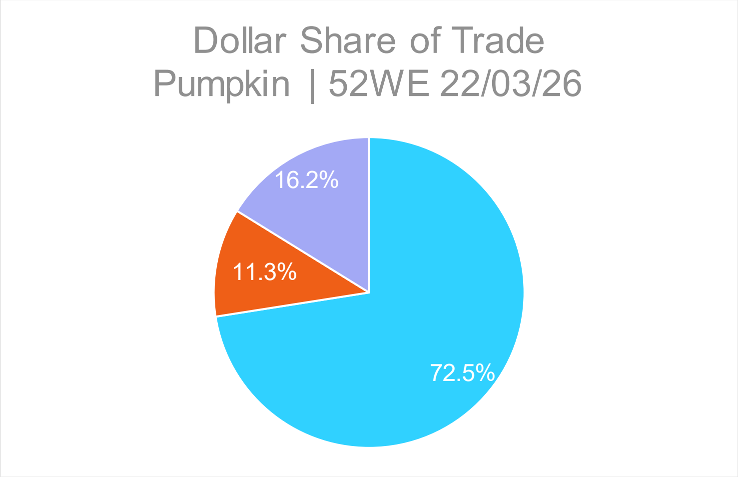


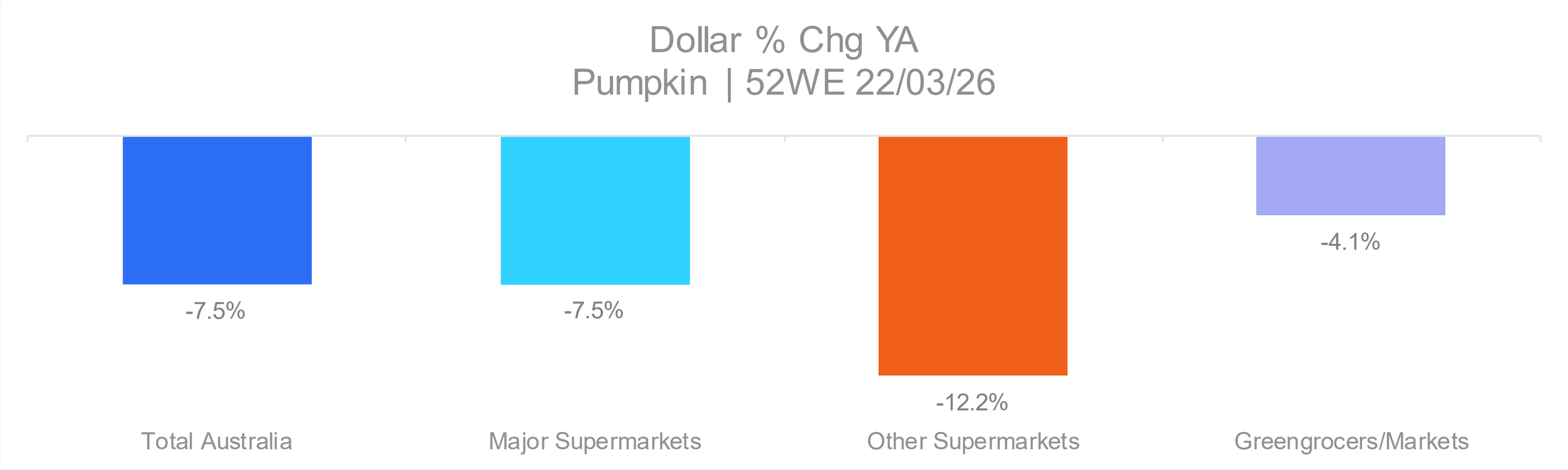
KG % Chg YA
Vegetables | 52WE 22/03/26

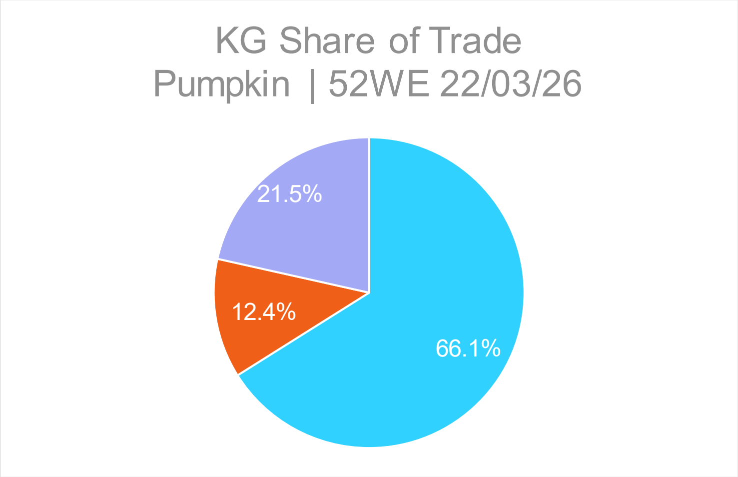


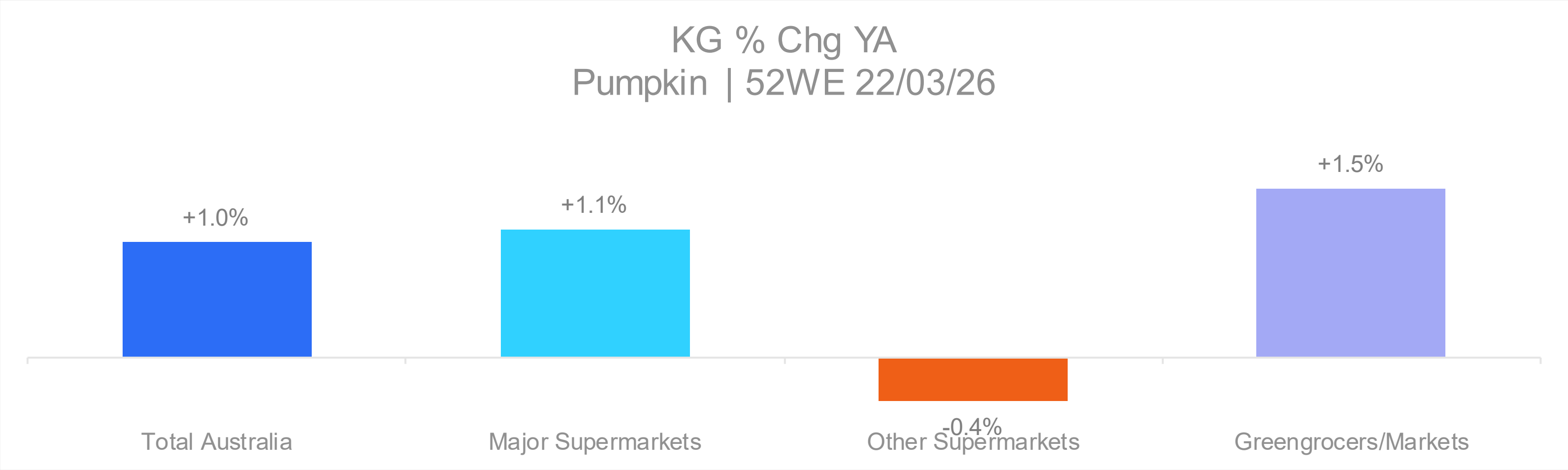
Source: NielsenIQ

Non major supermarket dollar sales losses were the steepest for pumpkins this year, this was coupled with a marginal drop in volume.









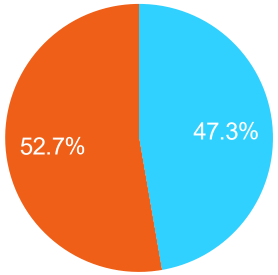
Source: NielsenIQ

Format Performance

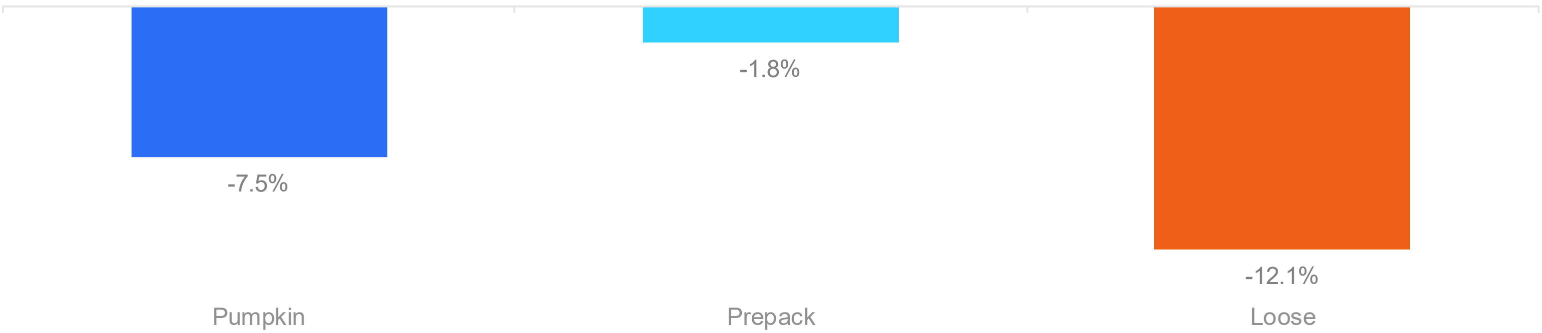
In major supermarkets (Woolworths, Coles, Aldi)

Across the major supermarkets, healthy volume growth for prepacked was dampened by a loss for loose. Dollar sales are also trading behind last year for this format.

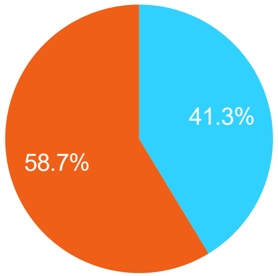
Dollar Share of Pumpkin
Major Supermarkets | 52WE 22/03/2026



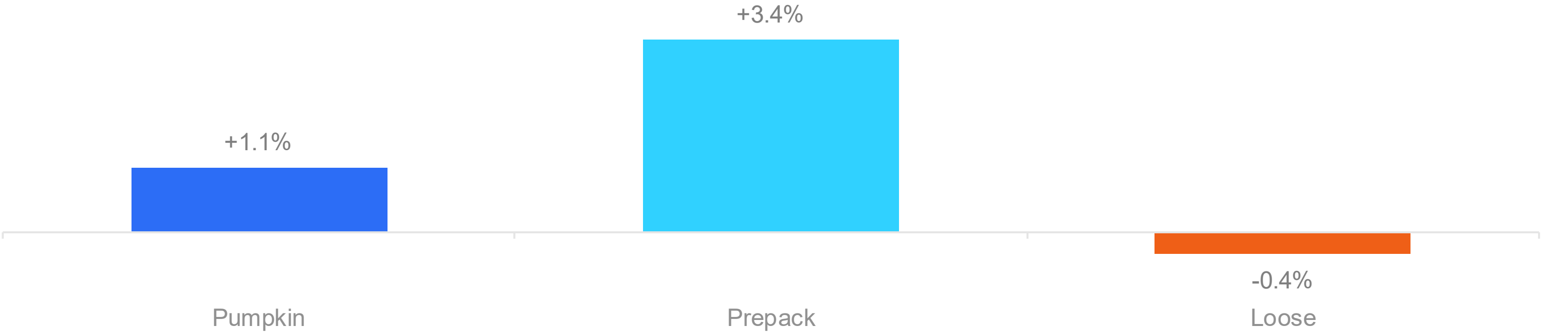
Dollar % Chg YA
Pumpkin | Major Supermarkets | 52WE 22/03/2026



KG Share of Pumpkin
Major Supermarkets | 52WE 22/03/2026

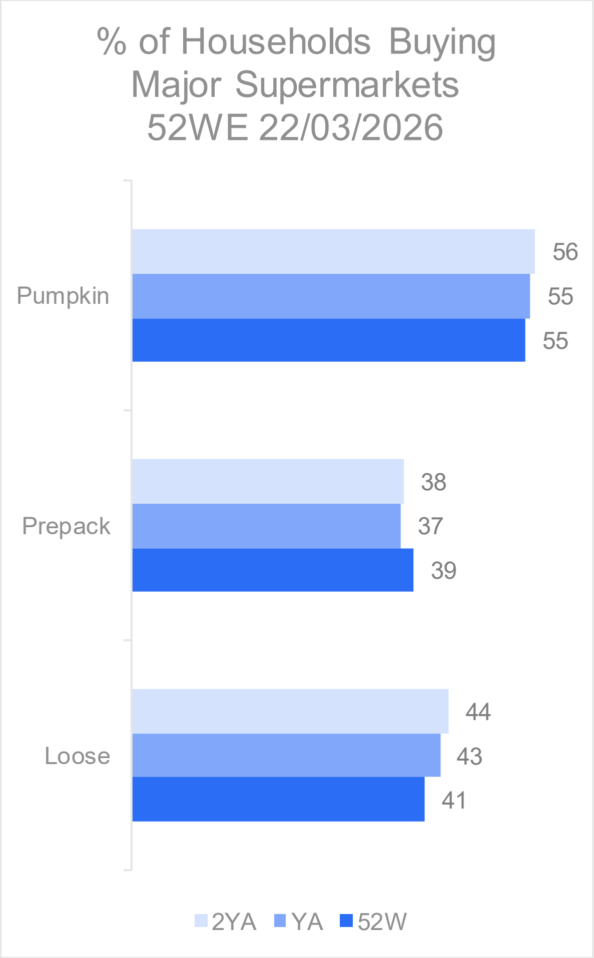


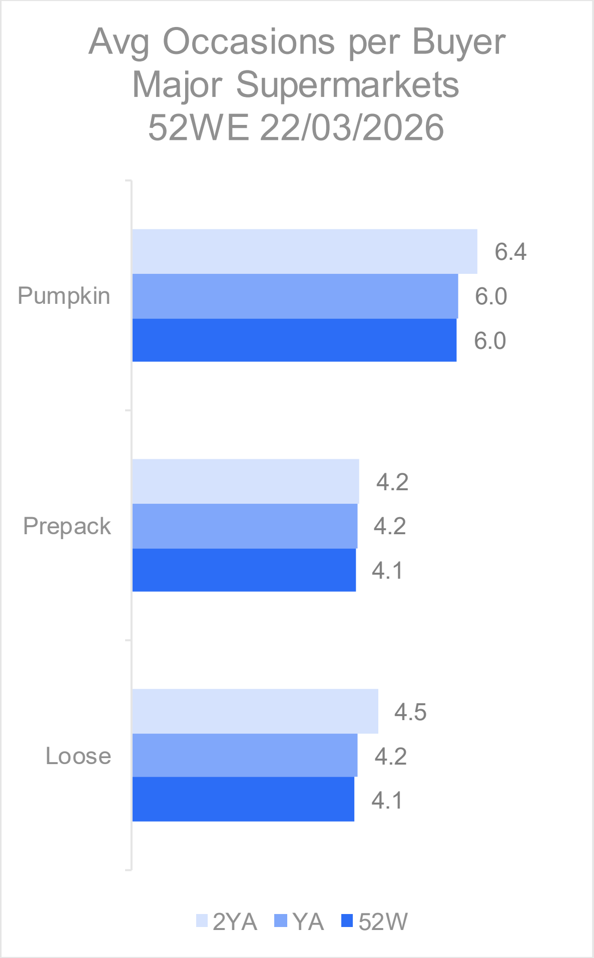
KG % Chg YA
Pumpkin | Major Supermarkets | 52WE 22/03/2026

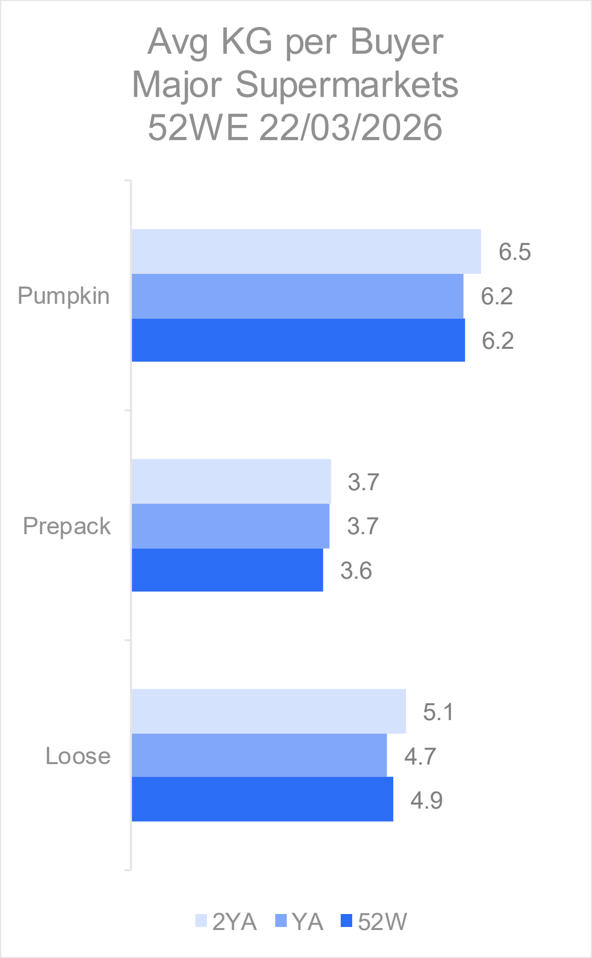


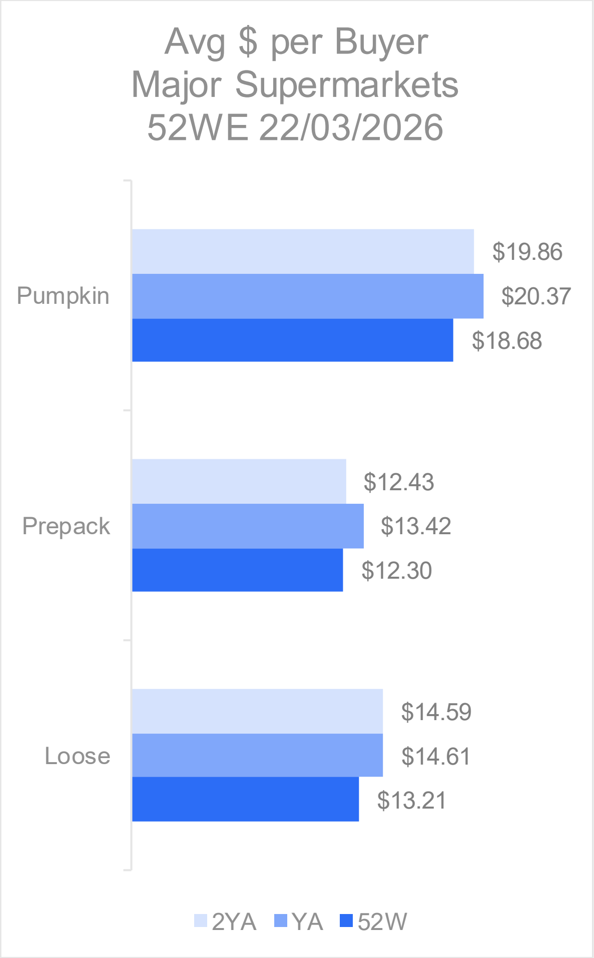
Source: NielsenIQ

Prepacked pumpkin growth is driven by buyer expansion, whilst loose pumpkin continues to experience penetration losses.



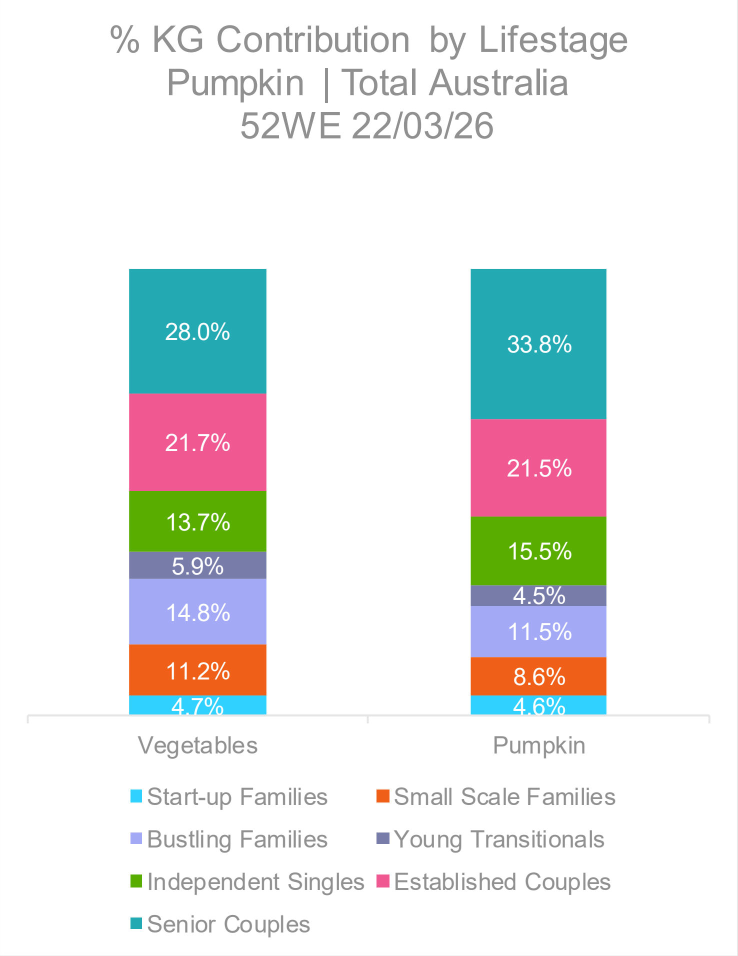


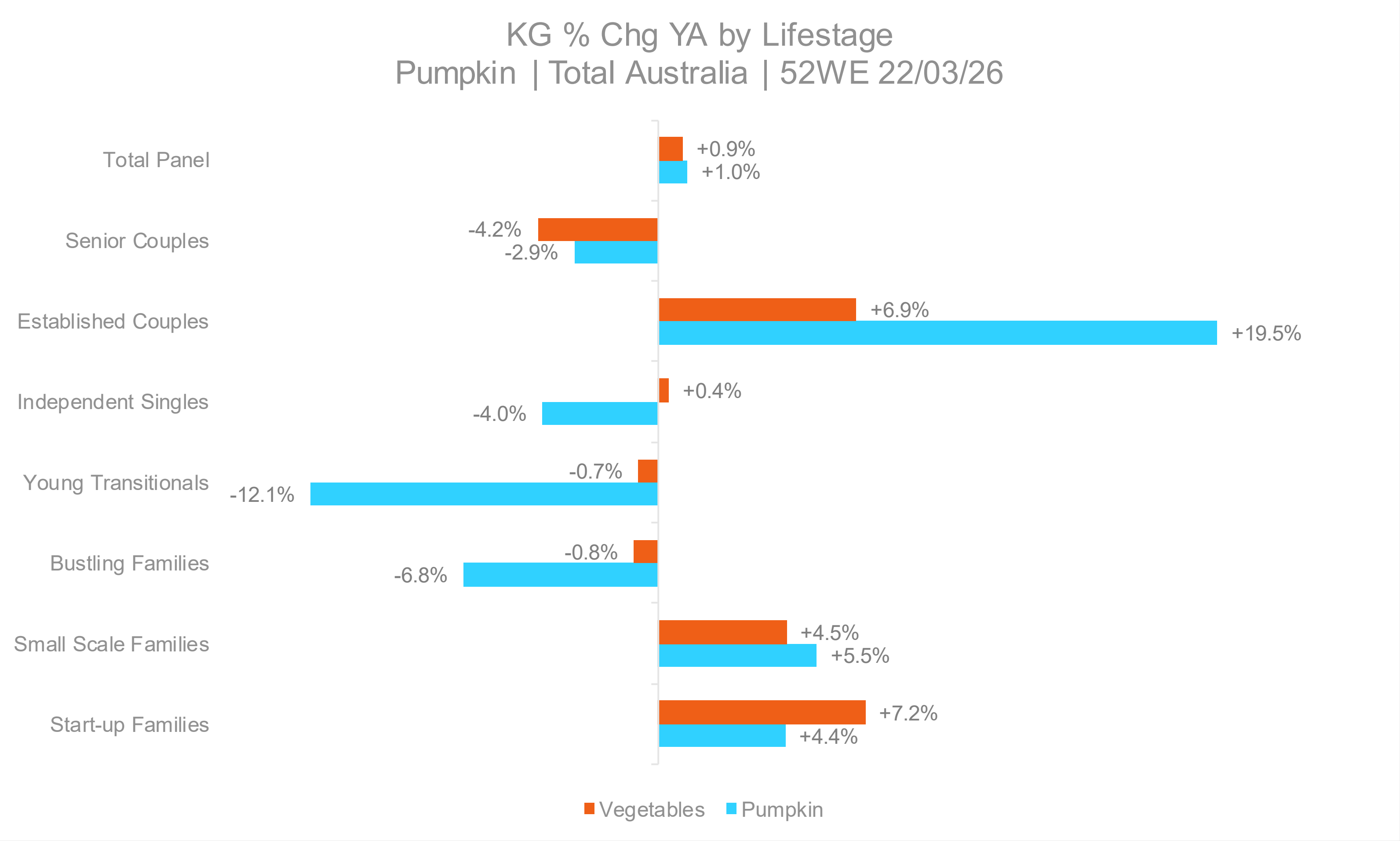




Profiling Pumpkin Shoppers

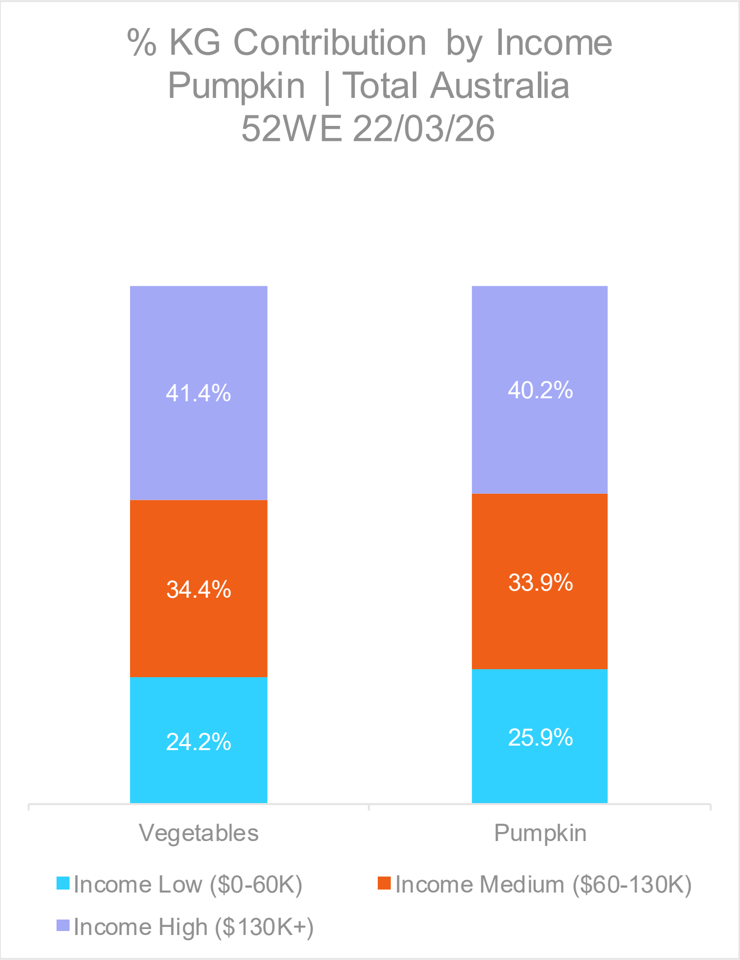
Volume results were uneven by household type with growth from established couples and families with babies and very young children countered by losses from all other groups.

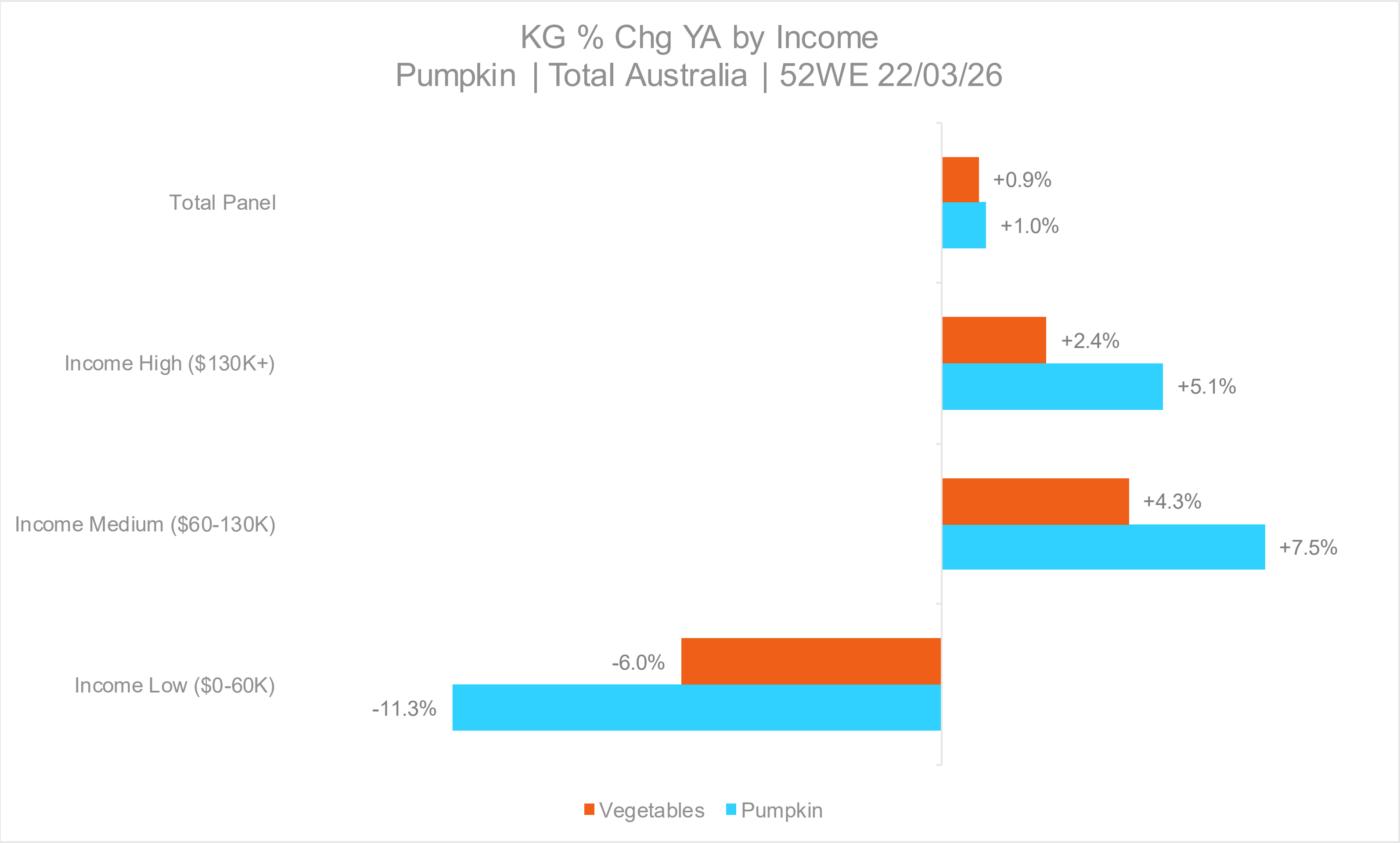




Source: NielsenIQ | * Low Sample Size, Do Not Use

A volume loss of -11.3% among low-income households curbed the growth evident across all other groups.





Source: NielsenIQ

Thank you