

## Key Market and Supply Figures

This section includes:

- Category production volumes.
- Retail and foodservice channel purchase volumes.
- The comparative average retail price of the category to the average price of total fresh vegetables/fruit.
- The current retail market value of fresh volume purchased by consumers.



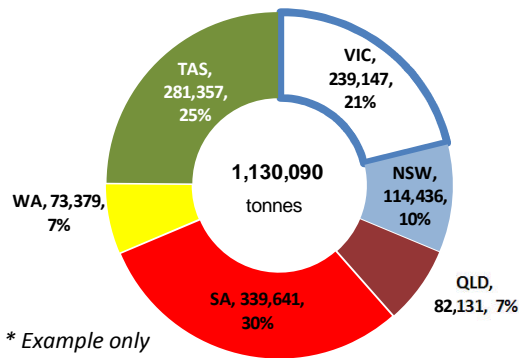
## Key Consumer Facts

This section includes:

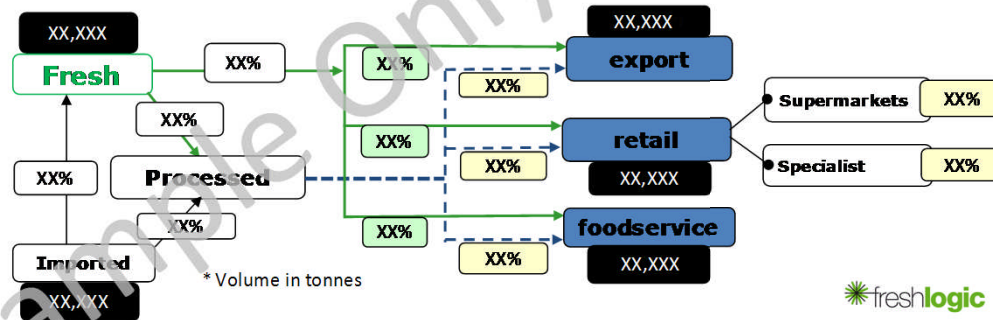
- Weekly purchase frequency of the category for the current quarter, with its ranked position in comparison to total fresh vegetables/ fruit.
- The purchasing behavior of the different household segments, including average purchased quantity of self-select and pre-packs.

## Total Production

Annual tonnes by state



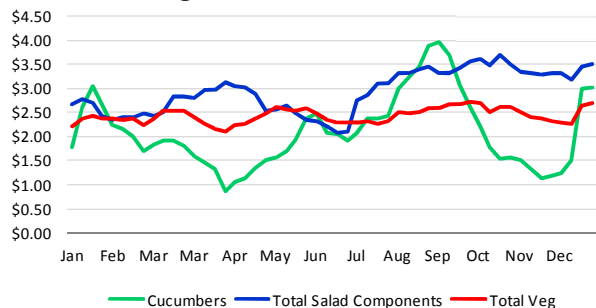
## Volumes and Shares Through the Chain



This diagram outlines the volumes and share of respective fruit/vegetables through the supply chain from production to consumption.

## Fresh Wholesale Pricing

Average Wholesale Prices 2010



\* Example only

This section tracks the wholesale price of the category, and compares it to the respective price of the category group and total vegetables. Key insights include:

- The average \$/kg wholesale price.
- The price range for the specific category and the month that the minimum/maximum price occurred.
- Any seasonal trends that occurred during the year.

This chart profiles the relative share of the fresh and processed product forms through the three distribution channels. For example:

- The market is dominated by flows of fresh product into retail, and processed product into foodservice, which between them make up X% of the market volume.

## Total National Sales Volume

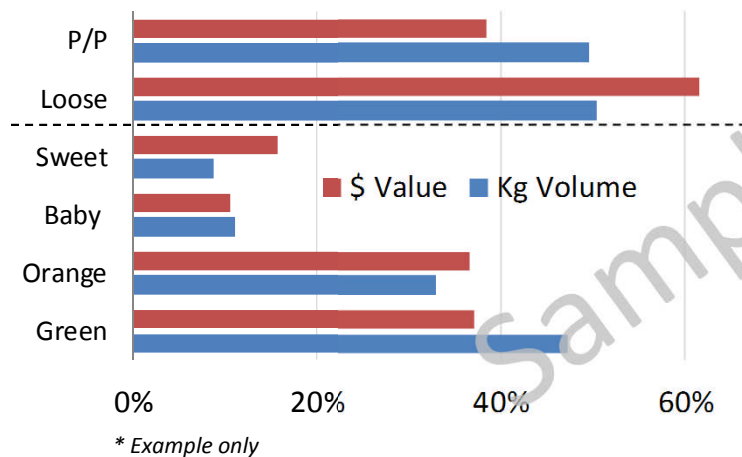
Share of total market volume



\* Example only

## Retail Fresh Sales

Category Sales Contribution- By Variety & Pack Type

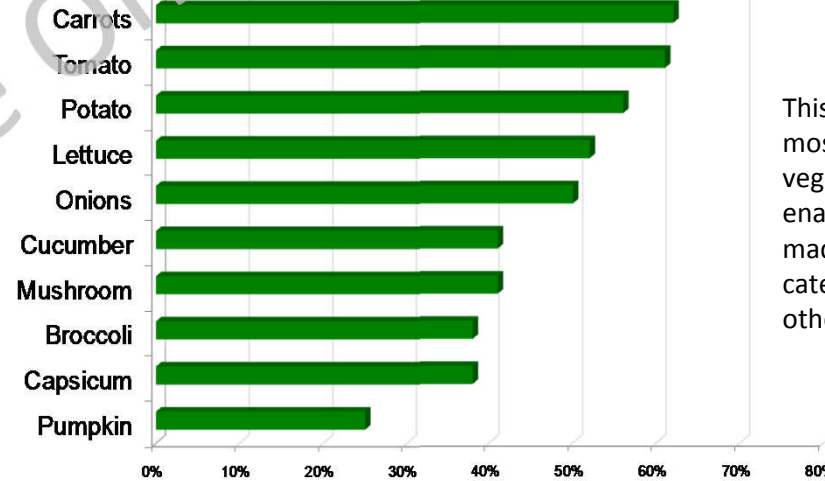


This section provides further insight into the varieties and pack types that makeup the retail sales contribution within the category. Key insights include:

- The breakdown of the relative volume and value share of each of the varieties within the category.
- The average retail sales price generated by each of the varieties in comparison to the average retail price of the category.
- The relative contribution towards volume and value of loose product versus pre-packed.
- The breakup of the pack weights e.g. 500 gram pack controls 54% of retail pre-packed sales volume, generating an average price of \$4.67/kg.
- Assessment of what effect pack type and size has on the average value of each of the varieties, and whether it creates precedents for a premium.

Top 10 Fresh Vegetables

purchased by households weekly - Qtr 4 2010

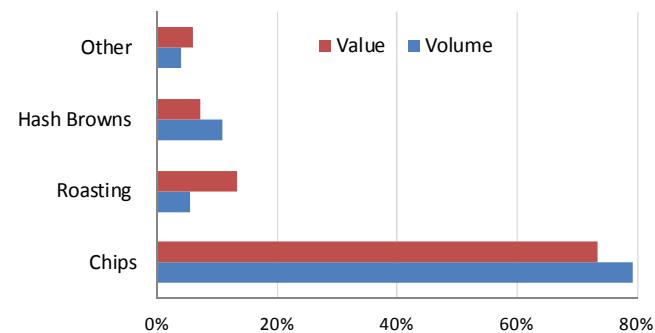


This graph highlights the most frequently purchased vegetables/fruit and enables comparisons to be made between the category in focus, and other categories.

\* Example only

## Retail Processed Sales

Frozen Processed Retail Sales



This section provides further analysis of the sales contribution, as it relates to frozen or canned products. Key insights include:

- The proportion of retail sales generated by frozen/canned product and the average \$/kg sales value.
- The volume and value share of each of the varieties within the category.

\* Example only

## Consumer Penetration

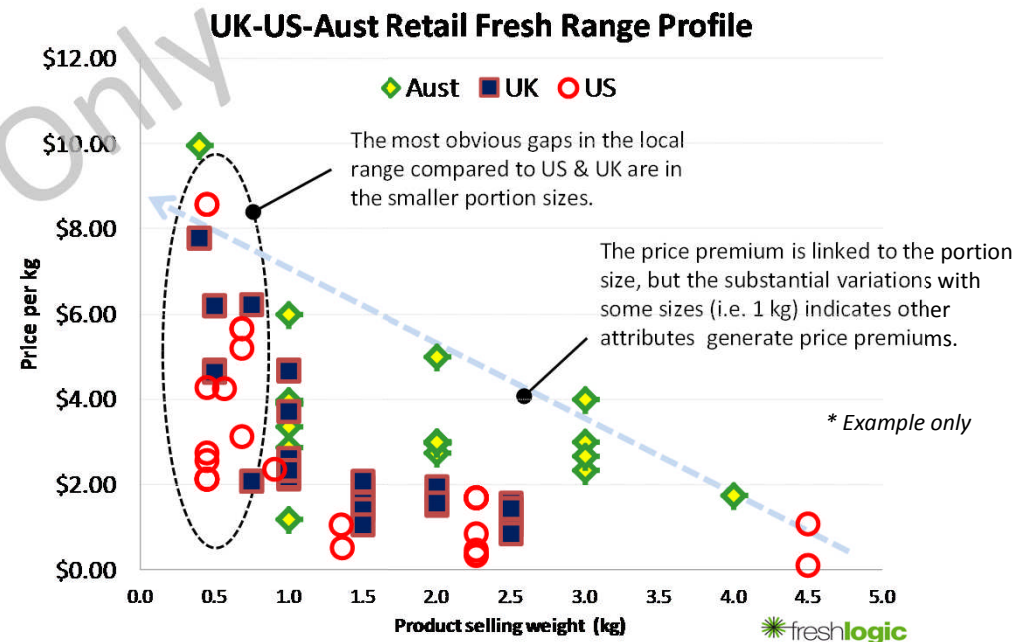
Segment	Average Purchased Quantity (kg)	Purchased Weekly
Singles & Couples with lower income	0.570	55%-65%
Singles & Couples with higher income	0.515	53%-62%
Budgeting families	0.599	53%-61%
Established families	0.665	52%-63%
Empty Nesters	0.694	49%-69%

Mealpulse™

This section draws data from the Mealpulse consumer panel, that captures the food buying attitudes and consumption habits of Australian individuals and households. Key insights include:

- The respective ranking of household segments according to the average weekly penetration for a given quarter, as well as the high and low points over the year, with insight into seasonal patterns.
- Analysis relating to the consistency of penetration levels throughout the year, assessing any seasonal factors that may affect these levels. This gives signals about the versatility of the product in meal occasions over the year.
- How the purchase quantities are affected by the household structure.
- How product purchases are affected by higher or lower discretionary dollars.
- The number of purchase occasions that were made by households over the year, in which the category in question was purchased.
- What type of product each segment is purchasing, in relation to pre-packed vs. loose selection and how this affects the overall quantity purchased by a given segment.

## UK -US -AUST Retail Range Profile



This analysis draws on data gathered from Australia retail and UK and US online sites. It considers similarities and differences between the respective retail range. Key insights include:

- Any apparent gaps in the Australian retail offer.
- The basis on which the products are sold, whether it is by the 'each' or per kilogram and what effect this has on the overall value of the category.
- Any anomalies that may occur within a specific market, together with any innovations that could be carried over to the Australian market.
- The make up of the product offer within each country and what this means for the overall category.

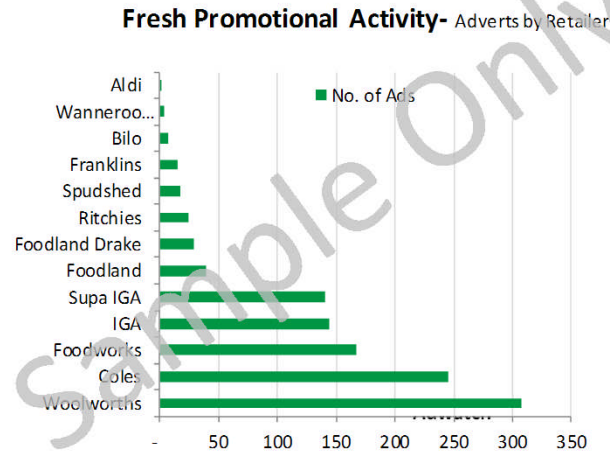
## What Quantity do Consumers Buy?

This section draws on the analysis of retail *Docket data*, provided as part of the Mealpulse™ panel, and conveys the average quantity purchased by Australian consumers for both loose and pre-packed selections.

## Fresh Promotional Activity

This section highlights the promotional activity of a given category and may include:

- The level of promotional activity per season.
- The total number of adverts, by retailer, and the number of weeks in the year that promotional activity occurred *e.g. a total of 275 adverts from 7 retailers, with some level of retail promotional activity in 45 of the 52 weeks in the calendar year.*
- The level of promotional activity going towards pre-packed sales (if applicable) and the average \$/kg compared to loose product.
- Any varietal comparisons that can be made within the category. *e.g. Butternut pumpkin attracts greater promotional activity than Kent.*



## Insights and Implications

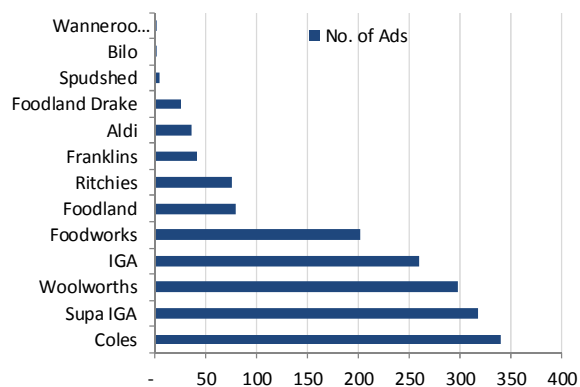
This section highlights the key insights reached throughout the report, together with direct implications for the client.

Examples may include:

- The presence of a premium product and the linkages of this to pricing in promotional activity.
- Comparisons between the average loose purchase quantity and current pack sizes available, establishing whether there is demand for smaller or larger pack sizes.
- The occurrence of a price premium generated by product variety or pack type.
- Any apparent gaps within the Australian retail offer that may provide future opportunities.
- The category involvement in retailer promotional activity and any opportunities or threats that may stem from this involvement.

## Frozen Promotional Activity

**Frozen Promotional Activity- Adverts by Retailer**



This section provides further analysis of promotional activity as it relates to frozen or canned products. Key insights include:

- The percentage of products that were branded, and identification of the top brands within the category.
- Review of the range of products found in the processed section.
- Key innovations that could be carried over to the fresh market.

## This category profile has been prepared by Freshlogic

Freshlogic is a specialised consulting and analysis business with a strong focus on the food industry.

We deliver a range of services to industry and corporate clients, which aim to interpret market and supply chain conditions, or address challenges faced in food supply chains associated with changes in the preferences of consumers, the expectations of the community, international trade and economic settings.

For more information on any of our products and services, please visit [www.freshlogic.com.au](http://www.freshlogic.com.au), or contact us on **phone** +61 3 9818 1588 or **email** [info@freshlogic.com.au](mailto:info@freshlogic.com.au).