



EGGPLANT COMPREHENSIVE REVIEW



52 weeks to 03.11.2019 vs Prior Year

What is Homescan?

Nielsen 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 either a small handheld terminal or an app on their mobile phone 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 to represent take-home purchases of the Australian household population.

Estimates produced from Nielsen 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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SUMMARY

- In the latest 52 weeks, eggplant saw relatively flat dollar sales (1.9%) and a decline in volume sales (-12.3%) compared to the average across all vegetables which saw dollar sales growth (4.3%) and flat volume sales (0.7%)
- Lower volume led to overall higher average prices across all retailer channels
 - Other supermarkets saw the highest % change in average prices which led this channel to higher dollar sales change in the past year
- Greengrocer & markets account for almost half of all eggplant volume sales and drove the overall volume decline with a drop in volume sales (-19.8%).
- Start-up families and high affluence households saw a higher dollar share distribution in eggplant compared to the average across all vegetables
- An opportunity for growth exists by showcasing the multicultural versatility of eggplants with different cooking styles for different meal occasions



EGGPLANT

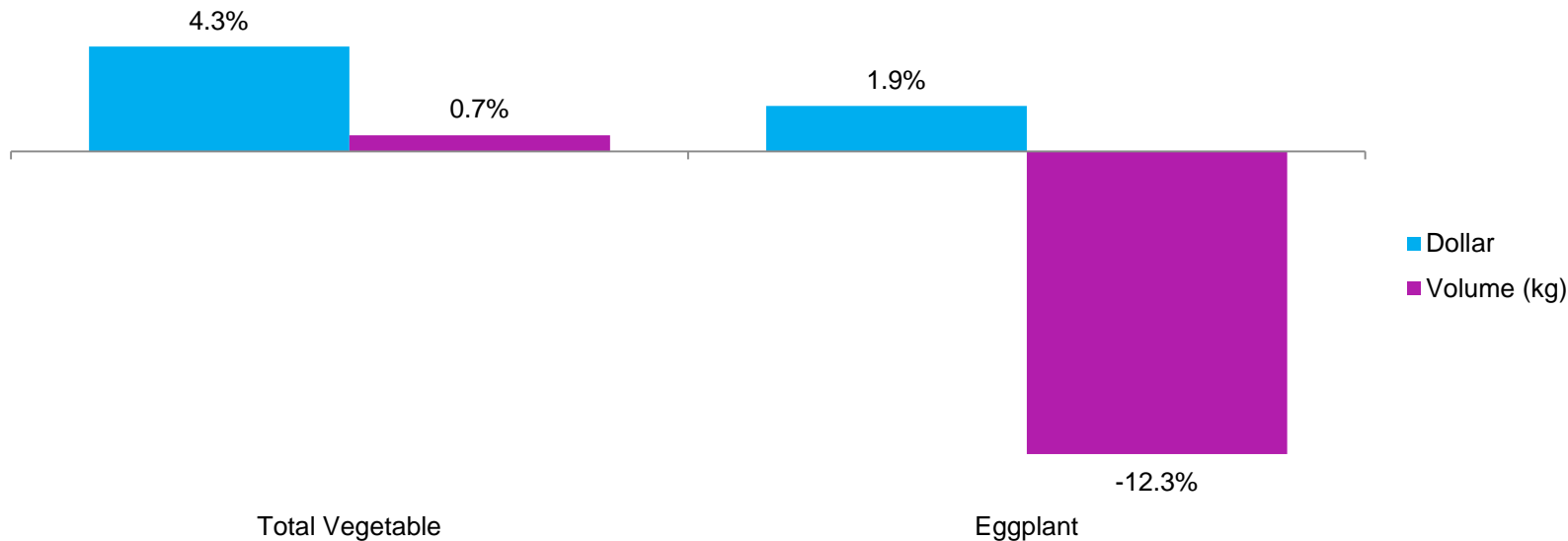
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EGGPLANT VOLUME SALES DECLINED AT A MUCH QUICKER RATE COMPARED TO THE AVERAGE ACROSS ALL VEGETABLES

Dollar sales for eggplant were relatively flat (1.9%) while the average across all vegetables grew (4.3%)

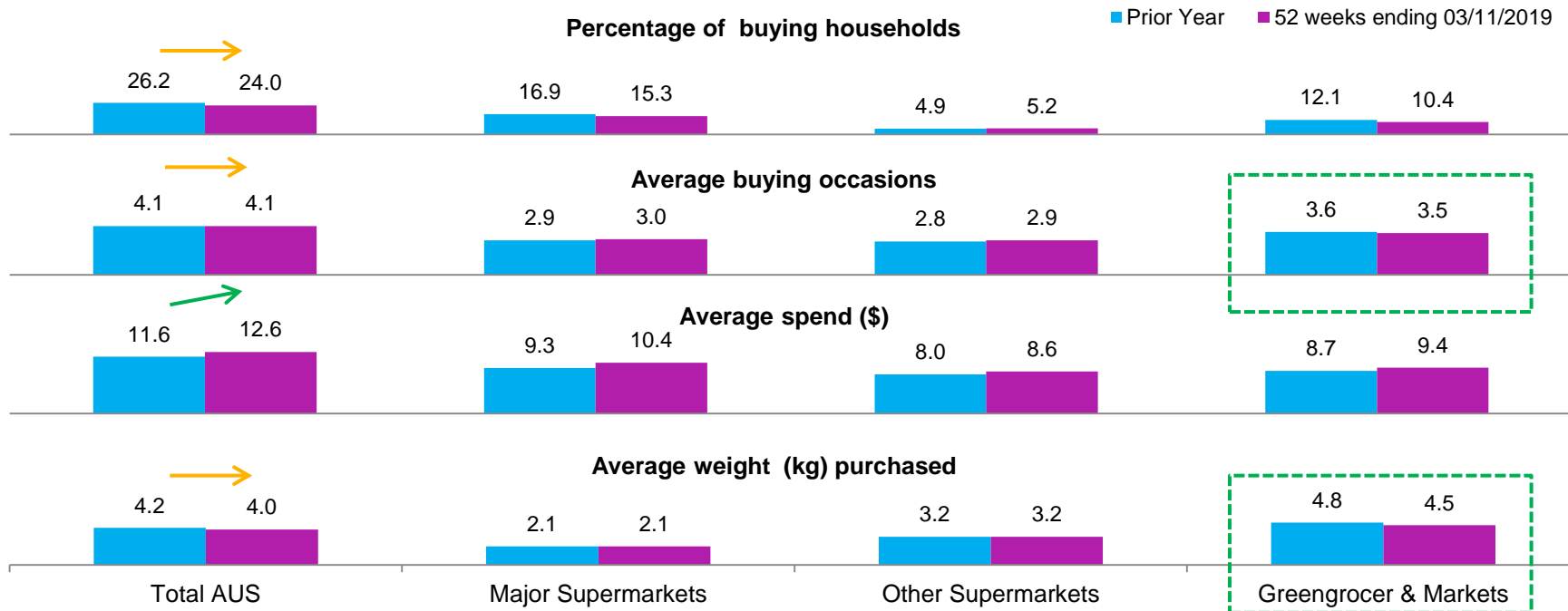
Total Vegetable & Eggplant | Dollar & Volume Sales Change | Total AUS | 52 weeks to 03/11/2019 vs Prior Year



HIGHER AVERAGE SPEND DRIVEN BY HIGHER AVERAGE PRICES

Greengrocer & markets had the highest average buying occasions and average weight (kg) purchased across all channels

Eggplant | Key Performance Indicators | 52 weeks to 03/11/2019 vs Prior Year

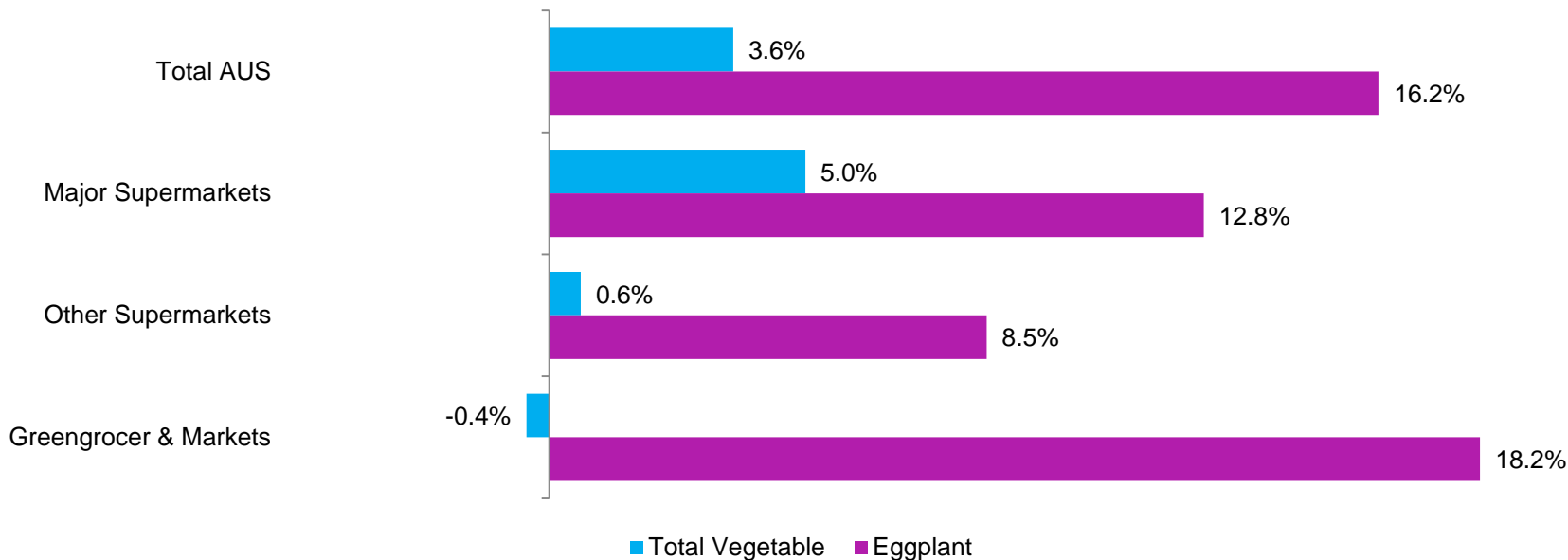


Source: Nielsen Homescan™

EGGPLANT SAW AN OVERALL HIGHER AVERAGE PRICE INCREASE COMPARED TO THE AVERAGE ACROSS ALL VEGETABLES

All retailers saw a higher average price increase in eggplant with greengrocer & markets seeing the highest change (18.2%)

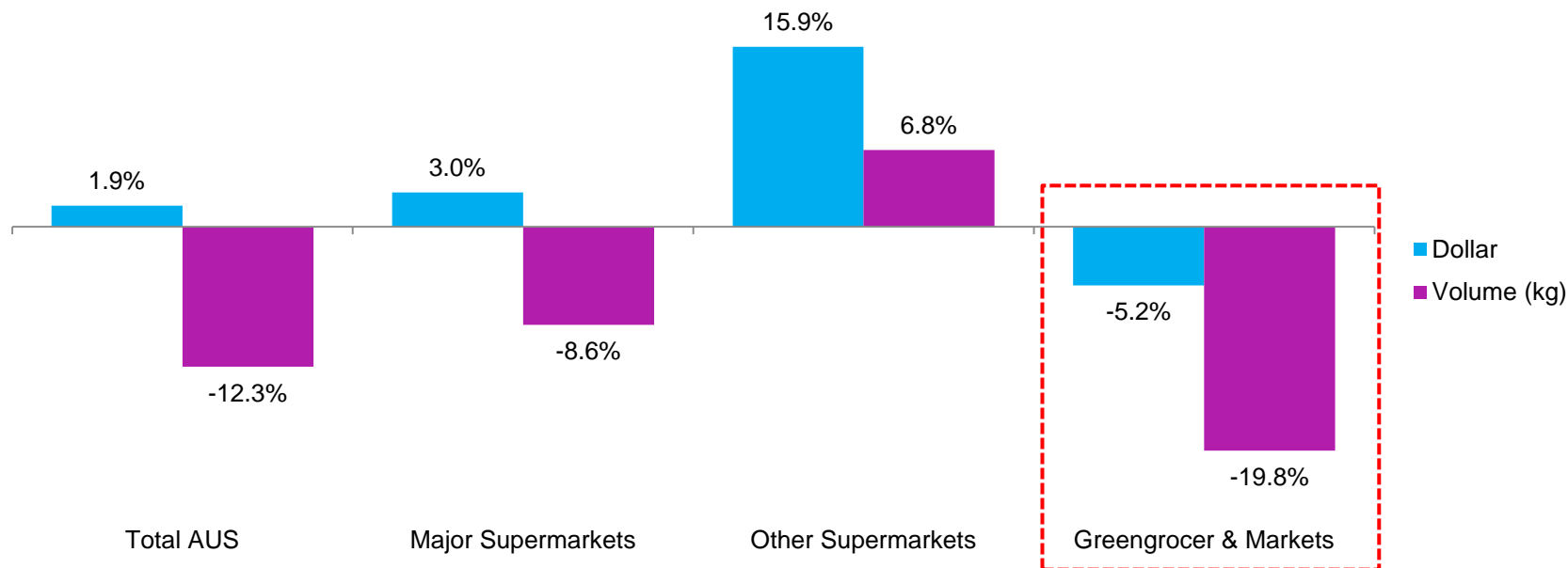
Total Vegetable & Eggplant | Retailer Average Price Change | Total AUS | 52 weeks to 03/11/2019 vs Prior Year



EGGPLANT SAW AN OVERALL DECLINE IN VOLUME SALES WITH GREENGROCER & MARKETS DECLINING THE MOST (-19.8%)

Greengrocer & markets saw a decline in dollar sales while all other channels saw dollar sales growth

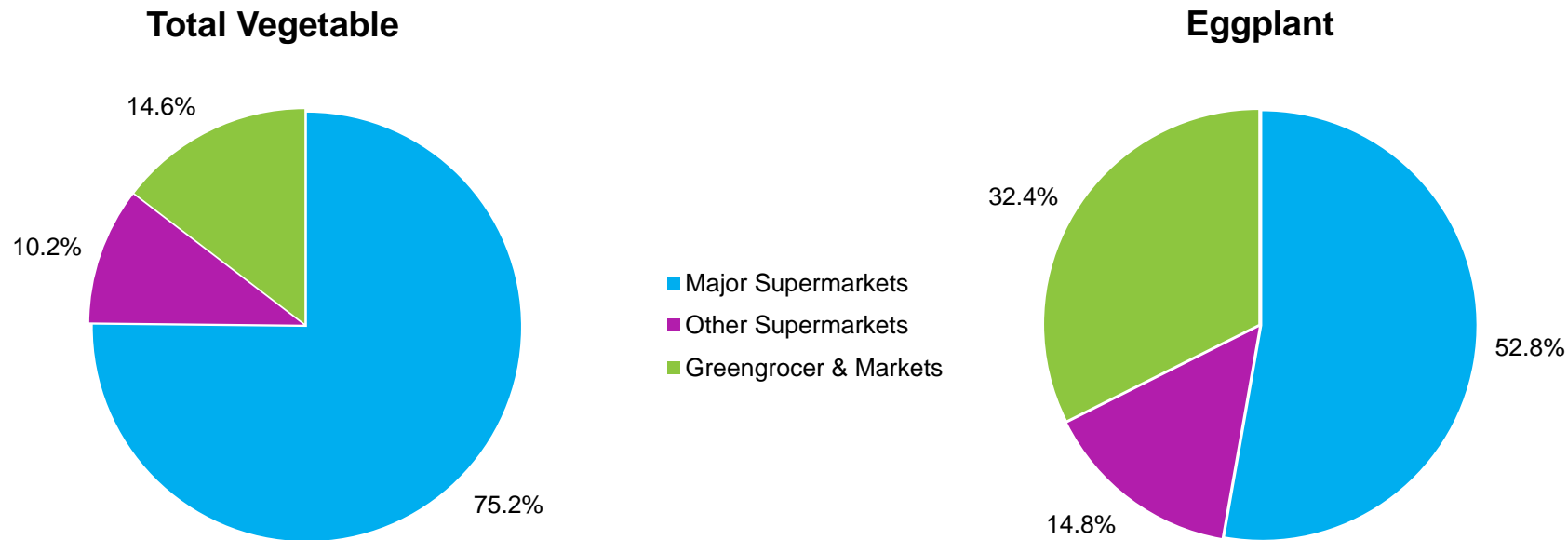
Eggplant | Retailer Dollar & Volume Sales Change | Total AUS | 52 weeks to 03/11/2019 vs Prior Year



MAJOR RETAILERS SIGNIFICANTLY UNDER-REPRESENTED IN EGGPLANT DOLLAR SALES (52.8%) COMPARED TO THE AVERAGE ACROSS ALL VEGETABLE (75.2%)

Eggplant dollar sales skewed towards greengrocer & markets (32.4%) compared to the average across all vegetable dollar sales (14.6%)

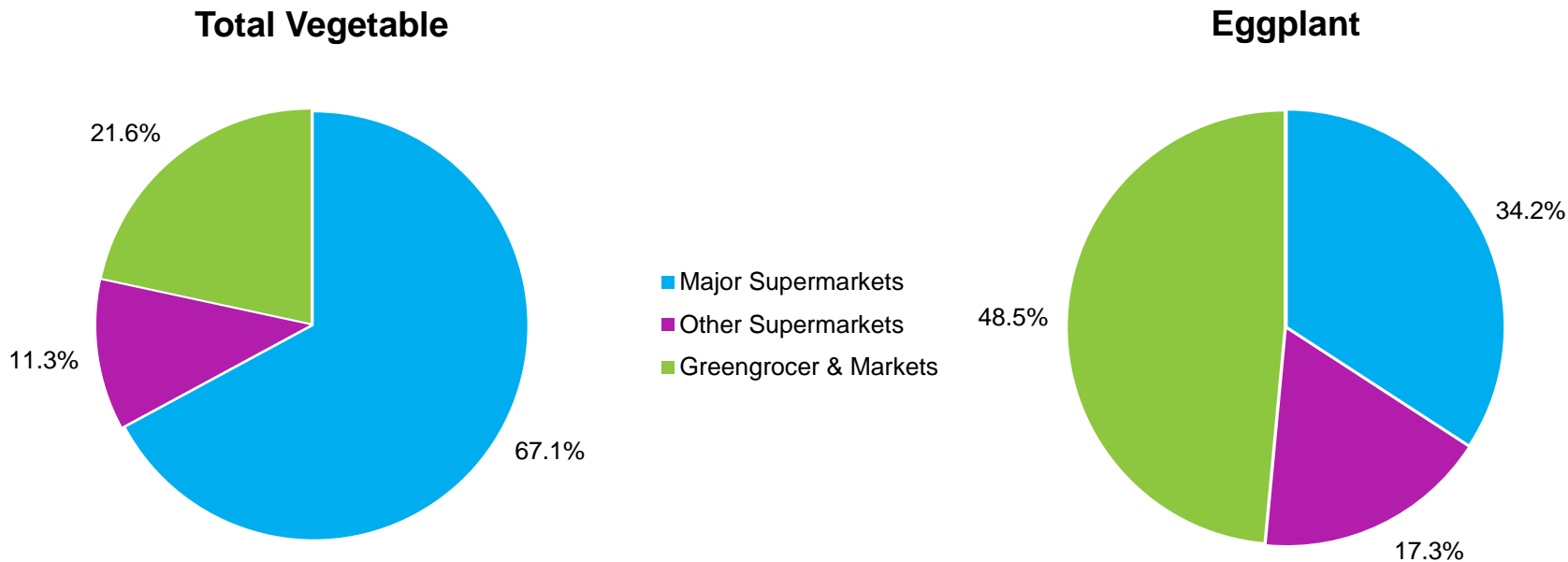
Total Vegetable vs Eggplant | Retailer Dollar Share of Trade | 52 weeks to 03/11/2019



GREENGROCER & MARKETS ACCOUNT FOR ALMOST HALF (48.5%) OF ALL EGGPLANT VOLUME SALES

Eggplant volume sales significantly skewed towards other supermarkets, greengrocer & markets compared to major supermarkets

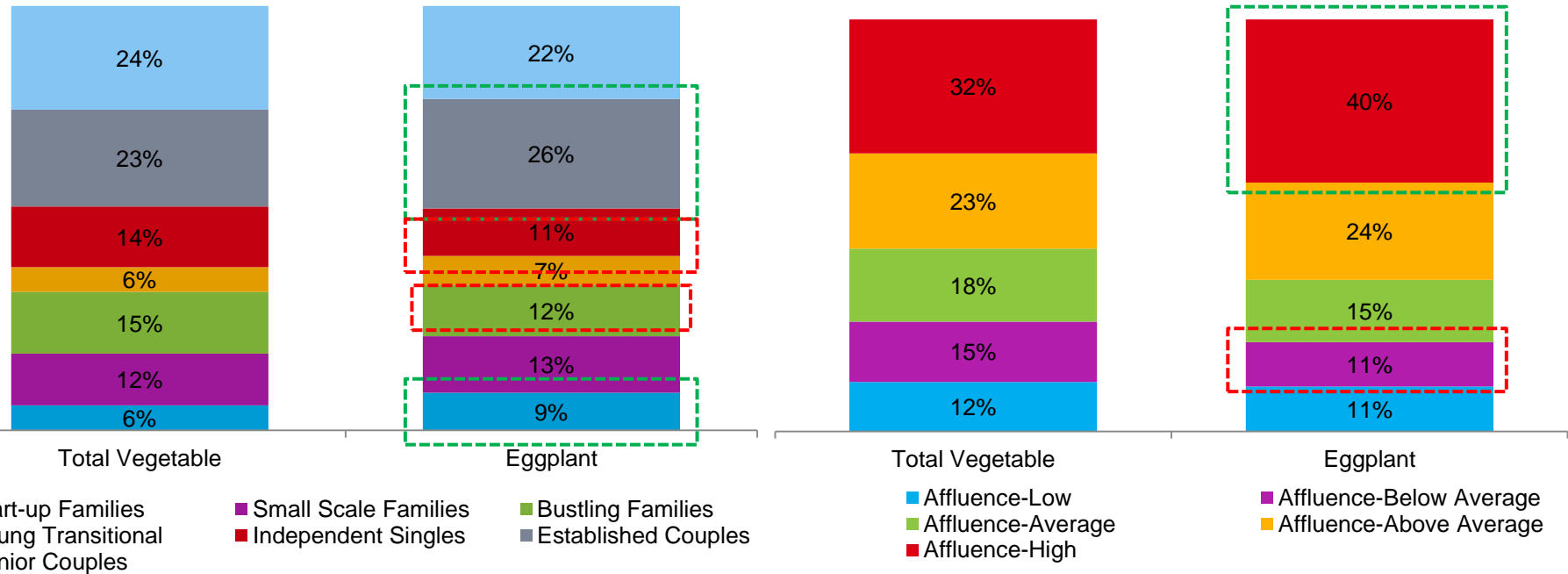
Total Vegetable vs Eggplant | Retailer Volume Share of Trade | 52 weeks to 03/11/2019



ESTABLISHED COUPLES, START-UP FAMILIES AND HIGH AFFLUENCE HOUSEHOLDS HAVE A HIGHER DOLLAR SALES DISTRIBUTION IN EGGPLANT COMPARED TO THE AVERAGE ACROSS ALL VEGETABLES

Eggplant saw independent singles, bustling families and below average affluence households contribute to a lower dollar sales distribution compared to the average across all vegetables

Eggplant | Lifestage & Affluence Dollar Sales Distribution | Total AUS | 52 weeks to 03/11/2019



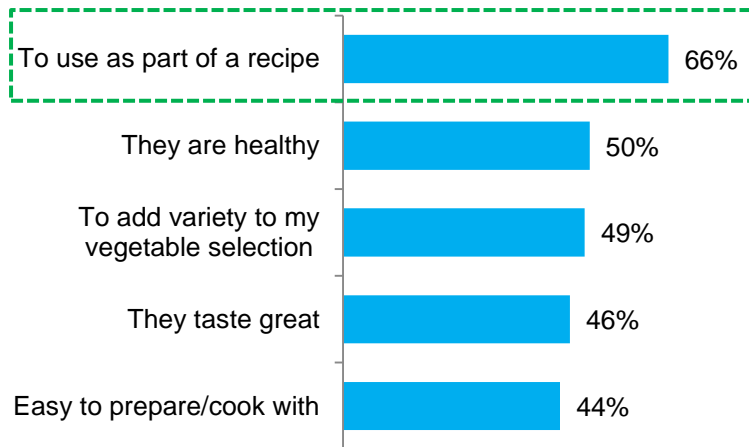
Source: Nielsen Homescan™

PURCHASING EGGPLANT TO USE AS PART OF A RECIPE WAS THE MAIN TRIGGER FOR PURCHASE

Recipes that incorporate the top cooking styles are a potential opportunity to further grow eggplant

Eggplant | Attitudinal Data

Triggers for purchase



Q8: Which of the following reasons best describe why you purchase Eggplant (multi-answer)?

Top Cooking Styles



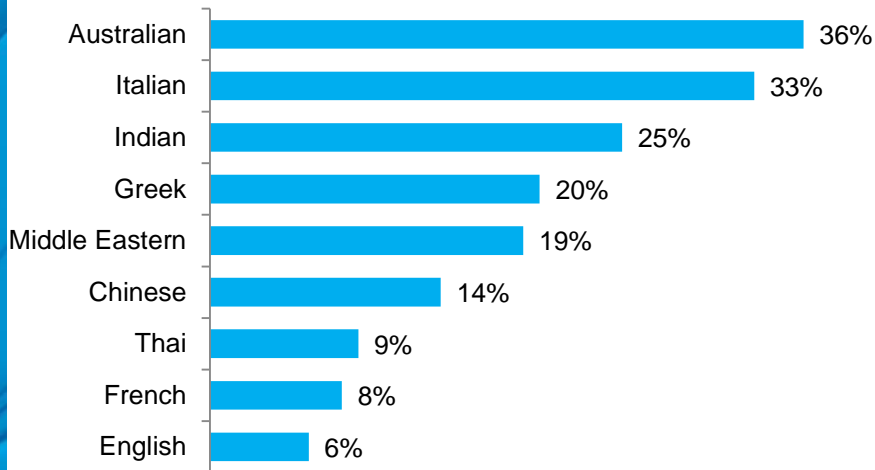
Q25: Which of the following cooking or preparation methods do you use to cook Eggplant (multi-answer)?

EGGPLANT MOST OFTEN ENJOYED OVER DINNER

Targeting eggplants heavy ethnic cooking styles for dinner and lunch occasions with popular cuisines would help further grow overall eggplant sales

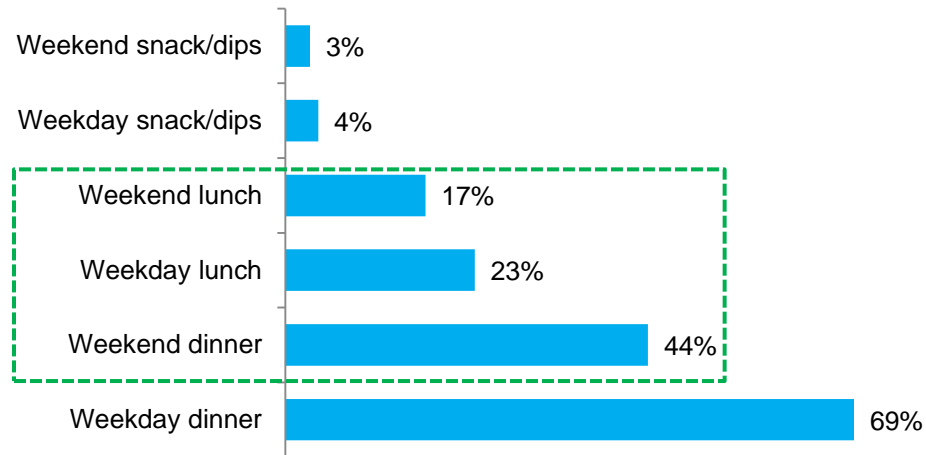
Eggplant | Attitudinal Data

Cuisine cooked when using eggplant



Q24: What types of cuisine do you cook or consume that include Eggplant (multi-answer)?

Occasions when eggplant is consumed



Q22: In the last week, in which of the following meals did you eat Eggplant (multi-answer)?



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