Hort Innovation

Understanding International Consumer Demand

Fruit Category Report

2023

This project has been prepared independently by Kantar for Hort Innovation and is funded through the Australian Government's Agricultural Trade and Market Access Cooperation (ATMAC) program with Hort Innovation levy contributions from the almond, apple & pear, avocado, blueberry, cherry, citrus, dried grape, fresh potato, lychee, macadamia, mango, melon, olive, onion, raspberry & blackberry, strawberry, summerfruits, sweet potato, table grape and vegetable industries.

Contents

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1.

Background and Objectives

The project context, objectives, approach and methodologies

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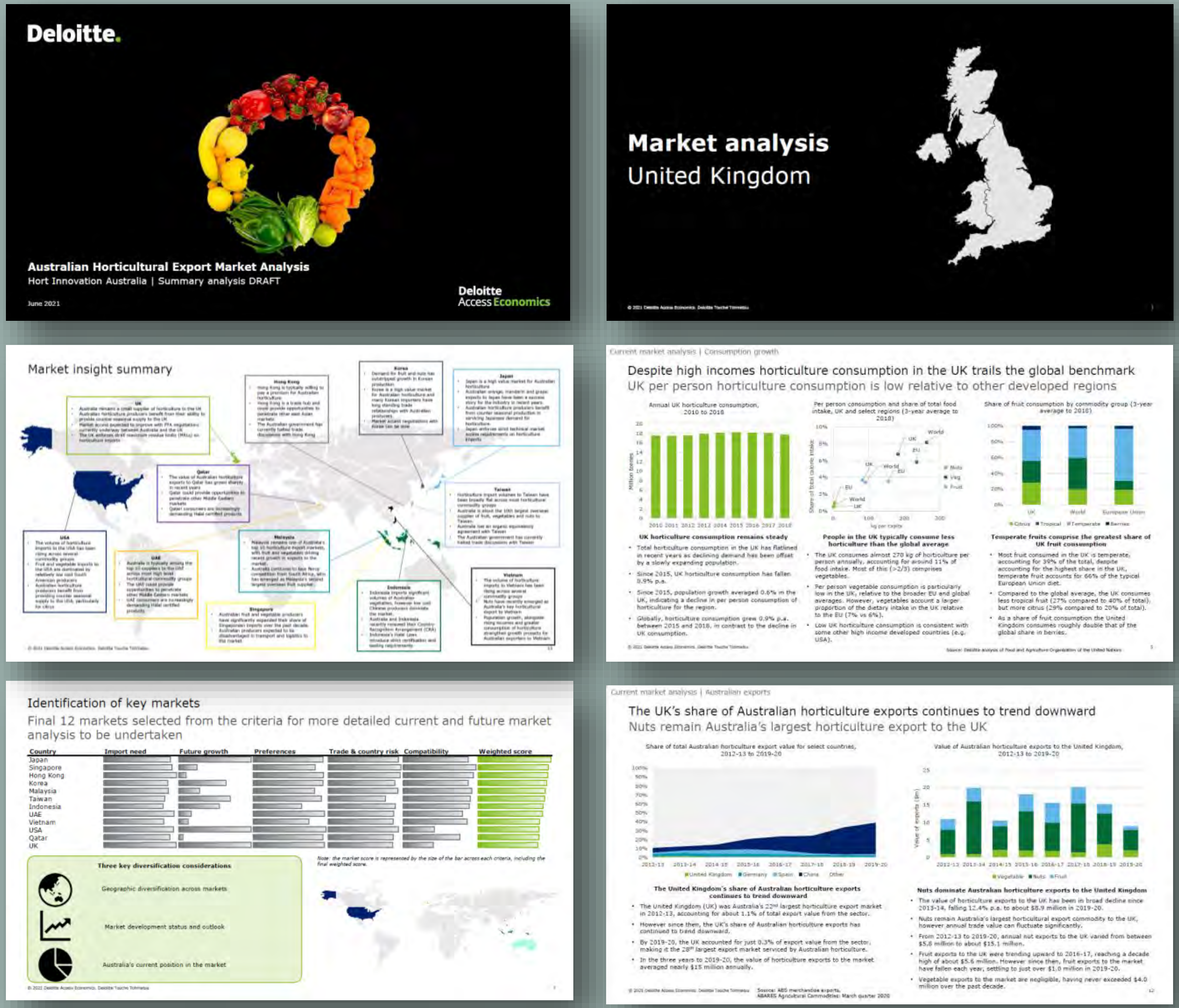
Background

- Addressing the disruptions of COVID-19 on Australia's ability to export, Hort Innovation proactively initiated and invested in several critical projects
- One of these projects, carried out by Deloitte, was designed to assess the opportunities to rapidly diversify and expand in export markets. They identified 13 markets that offer growth potential
- This project builds on these past programmes and is designed to provide an in-depth understanding of consumption in these critical markets, to identify export growth opportunities for commodities of interest

The Deloitte report

- The Summary Market Analysis report identified x12 markets for Australian export and ranked the markets based on import need, future growth, preferences, trade & country risk and compatibility
- The Market Analysis then dove into each markets' import potential, based on existing market sizes, trajectory and the competitive landscape
- This Kantar report builds on this analysis and provides the crucial consumer lens for the x12 markets. Furthermore, India has been included as a 13th additional market.



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Central research question:

"How can Australian Horticultural Industries unlock growth by generating consumer demand for different categories across different international markets for today and tomorrow?"

Objectives

- The objective of this study is to provide a consumer-led perspective on the export opportunity of Australian horticulture
- It will unpack consumers attitudes and values, as well as their fresh produce shopping behaviour and how they consume fruits, vegetables and nuts in each of the 13 markets
- It will provide a strategic lens on which markets represents the most attractive opportunity for each of the priority commodities
- Plus, identify which commodities have the strongest right to play within each market
- This is about optimising export and product positioning today and in to the future in order to drive growth against prioritised industries and facilitating the deployment of effective and coordinated trade marketing resources

Therefore, the focus of this report is understanding the consumer.

We will get under the skin of peoples’ attitudes towards food, how they shop for produce and why, when and how they consume fruits, vegetables and nuts.

Through analysing their propensity to spend more on premium, plus their appetite for Australian, we will reveal the strongest commodity consumer export opportunities.

The 13 markets included in the study were chosen off the basis of Deloitte analysis identifying priority markets for Australian export


USA


UK


Singapore


India[1]


Japan


Hong Kong


South Korea


Malaysia


UAE


Qatar


Taiwan

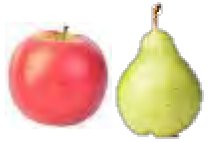

Vietnam


Indonesia

Note 1 India was added as an additional 13th market however was ranked 17th in the initial Deloitte analysis

The study represents 20 industries that prioritised export in their Strategic Investment Plans for 2022-2026


Almond


Apple & Pear


Avocado


Blueberries


Cherry


Citrus


Dried Grapes


Lychees


Macadamia


Mango


Melons


Olives/Olive Oil


Onion


Potatoes


Raspberries
& Blackberries


Strawberries


Summerfruit


Sweet Potato


Table Grapes


Hard Veg,
Fruiting Veg & Leafy Veg

The 13 fruit groups of interest included in the study


Apple


Blackberries


Blueberries

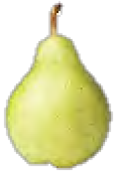

Cherry


Citrus


Lychees


Mango


Melon


Pear


Raspberries


Strawberries


Summerfruit


Table Grapes

The Approach

1. Audit & Discovery

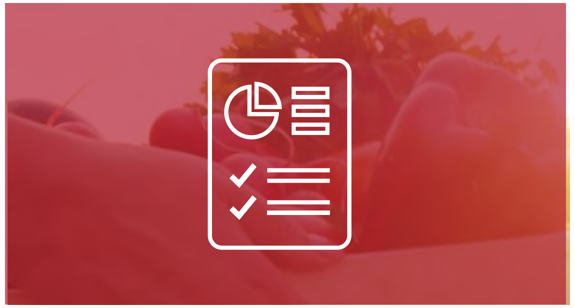
What we will do
- Project kick off
- Knowledge audit
- Stakeholder alignment

The outcome
Clear understanding of key hypotheses and inputs into later stages of work and alignment on the knowledge gaps

2. Localise & Enrich

What we will do
- In-depth culture, category & consumer understanding
- Expert interviews (x3 per market)

The outcome
In-depth local market understanding of the cultural forces driving & shaping consumer demand in the market today and where it is moving to in the future



3. Develop Growth Plan

What we will do
- Identify & quantify
- Growth opportunities

The outcome
Consumer profiling based on demographics, occasions and needs. Defined & quantified opportunity spaces and clear recommendations on prioritized opportunities

4. Align & Embed

What we will do
- Create & embed roadmap for growth

The outcome
Aligned team trained, engaged and ready to activate clear missions & jobs to be done against prioritized horizons. A unified growth narrative tailored and fit for purpose for key stakeholder groups.

1. Audit and Discovery
Interview programmes methodology

Knowledge audit

– Thorough review of the existing resources within Hort Innovation to ensure we build on existing body of knowledge rather than repeat it

Internal stakeholder interviews

– 30 x 1 hour interviews with key stakeholders identified by Hort Innovation

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2. Localise and enrich
Enriched market understanding

External expert interviews

- 3 x 1 hour interviews per market with local market experts
- Experts were either direct importers of priority commodities or fresh produce retail experts
- The 39 interviews totalled nearly 70 hours of shared knowledge and insight across the 13 markets and 25 commodities

3. Develop Growth Plan
Quantitative research methodology

Local Market Research

- 25-minute online survey conducted in each of the x13 markets
- Demographically national representative sample of N=4,000 per market (N=500 in Qatar; N= 3, 000 in Hong Kong)
- Respondents are medium & high income consumers only
- Survey design included:
  - Category usage across fruit, veg and nuts
  - General attitudes, values and produce shopping behaviours
  - In-depth occasion understanding of their own recent consumption of up to two of the priority commodities consumed frequently
  - Surveyed perceptions of Australia, perceptions of premium and the right for Australia to command a premium

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3. Develop Growth Plan

Outputs & reporting structure

Market reports

- The **x13 market reports** take the lens of the priority country. The purpose is to provide a holistic picture of consumers within that market, including their attitudes, shopping behaviours and horticulture consumption.
- The strategic lens will identify which priority commodities are most attractive and have the greatest appeal for consumers in that market.

Category reports

- The **x3 category reports** will include detailed profiling of each of the priority commodities. The purpose is to provide in depth analysis on how each fruit, vegetable or nut is consumed around the world.
- The strategic lens will provide a perspective on which markets represent the strongest consumer opportunity for export.

The focus of this report

3. Develop Growth Plan
Commodity report contents

Contents

	CHAPTER	CONTENT
1	**Introduction: Background & Objectives**	Project context, research question, objectives and methodologies
2	**Market Prioritization matrix**	In-depth introduction to the Attractiveness and Addressability matrix that forms the foundations of subsequent market prioritisation and profiling across commodities
3i.	**Commodity prioritization**	Evaluation and prioritisation of which of the 13 markets are most attractive for each commodity
3ii.	**Commodity profiling**	Profiling at the commodity level of consumers consumption behaviours, occasion needs, barriers, substitutes and premium drivers
4	**Appendix**	Commodity data across all 13 markets and further detail

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2.

Market Prioritisation matrix

In-depth introduction to the Attractiveness and Addressability matrix that forms the foundations of subsequent market prioritisation and profiling across commodities

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The strategic objective:

To determine – from a consumer perspective – which markets represent the strongest growth opportunities for Australian exports based on commodity usage, Australian appeal & the ability to command a premium

This analysis provides the consumer lens and is not intended to cover the totality of factors that influence the attractiveness and addressability of a market (e.g., supply chain, regulatory environment etc.).

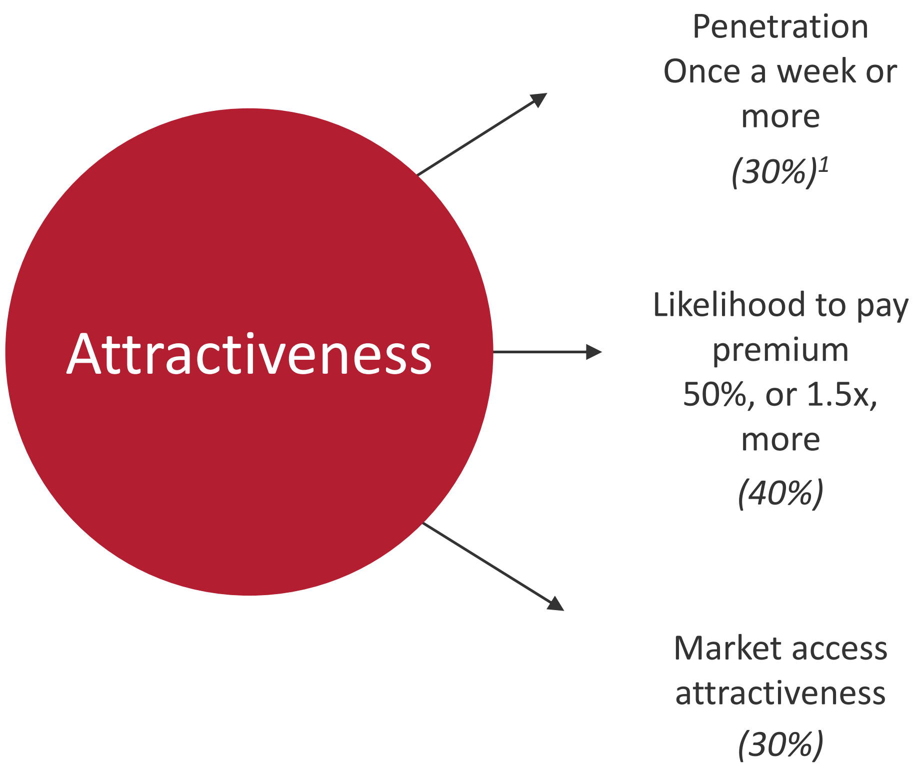
The aim is to identify the most attractive export markets for Australian commodities and **there are two key axis on which we will evaluate each market to determine the priorities.**

Attractiveness + **Addressability**

How attractive is the consumer opportunity in a market for a commodity?

How addressable is the consumer opportunity in a market for a commodity?

Attractiveness is determined by a number factors. Each factor carries a different weight reflecting their relative importance



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1 % refer to the relative weight of each metric

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Commodity Attractiveness determines the size of the potential opportunity for a particular commodity

Attractiveness

Metric	Question	What this gives us
Penetration Once a week or more	*How often do you consume each commodity?*	Existing commodity penetration that represents an indicative size of the opportunity
Likelihood to pay premium 50%, or 1.5x, more	*Would you be willing to pay more for a premium quality commodity?*	The commodities for which consumers are willing to pay more & are an attractive opportunity
Market access attractiveness	*Deloitte Access Economics Metrics*	A combined measure of the market's dependency on imports, future economic prospects and demand preferences

The factor *Market Access Attractiveness* is composed of 3 inputs from the Deloitte reports that identified key horticulture export markets included in this study

Market Access Attractiveness

1. Import Dependency

- 3-year average value of imports
- Consumption's share of production
- 10-yr change in value of imports

Higher values in indicators demonstrate a greater reliance on imports and sustained growth

2. Future Economic Prospects

- Level change in GDP per capita between 2020 and 2030
- Level change in urban population between 2020 and 2030

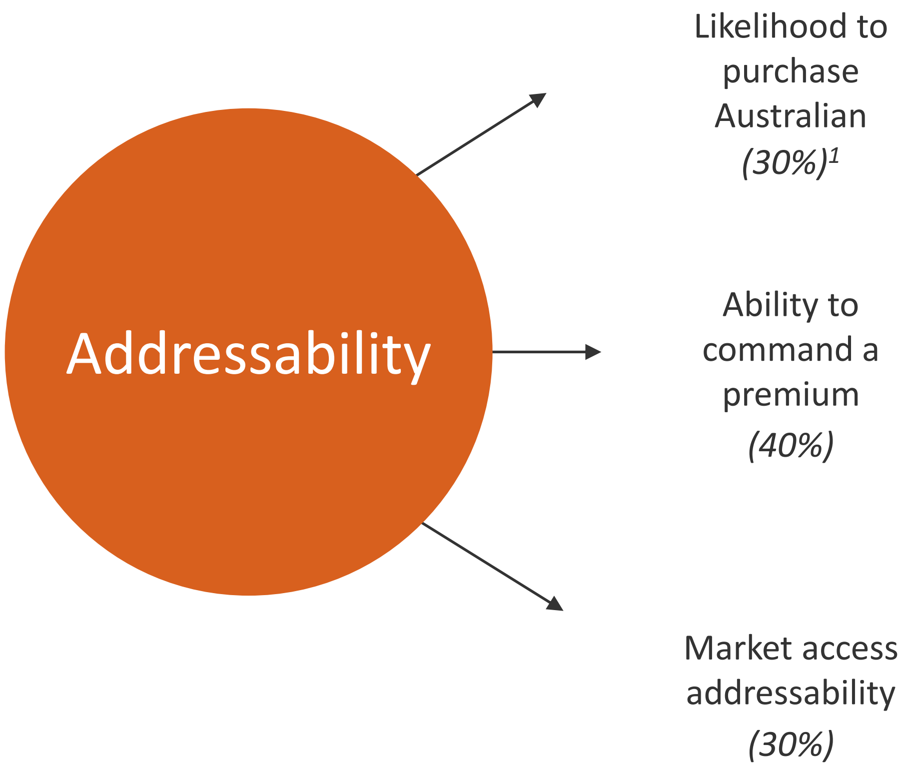
Higher values demonstrate larger high income markets

3. Preference Advantages

- World Economic Forum (WEF) quality of demand
- Do horticulture imports align with AU exports?
- Is the country in the northern hemisphere?

Higher rankings demonstrate greater potential for Australian horticulture to differentiate itself in market

Consumer addressability is determined by a number of factors. Each factor carries a different weight reflecting their relative importance



1 % refer to the relative weight of each metric

Consumer addressability provides an indication of the potential to realise the export opportunity based on how likely consumers are to purchase Australian or pay a premium for quality

Addressability

Metric	Question	What this gives us
Likelihood to purchase Australian	*Which would you be most likely to buy imported from Australia?*	The commodities for which Australian origin is appealing
Ability to command a premium	*How willing would you be to pay more for a premium quality commodity?*	The commodities for which there is untapped premium opportunity
Market access addressability	*Deloitte Access Economics Metrics*	A combined measure of the market's value chain competitiveness and a measure of the ease of trade and country risk

The factor *Market Access Addressability* is composed of 2 inputs from the Deloitte reports that identified key horticulture export markets included in this study

Market Access Attractiveness

1. Ease of trade and country risk

- World Economic Forum (WEF) foreign competition
- Existence of Free Trade Agreements (or in negotiation)
- World Bank political stability index
- WTO dispute status

Higher ranks indicate a lower cost of doing business and reduced risk of market disruption from political factors.

2. Value chain competitiveness

- Relative distance to market
- World Economic Forum (WEF) Port/transport infrastructure index
- Australian horticulture import prices relative to country average

Higher rankings demonstrate greater potential for Australian horticulture to differentiate itself in market

KANTAR Source: Deloitte Access Economics 2021

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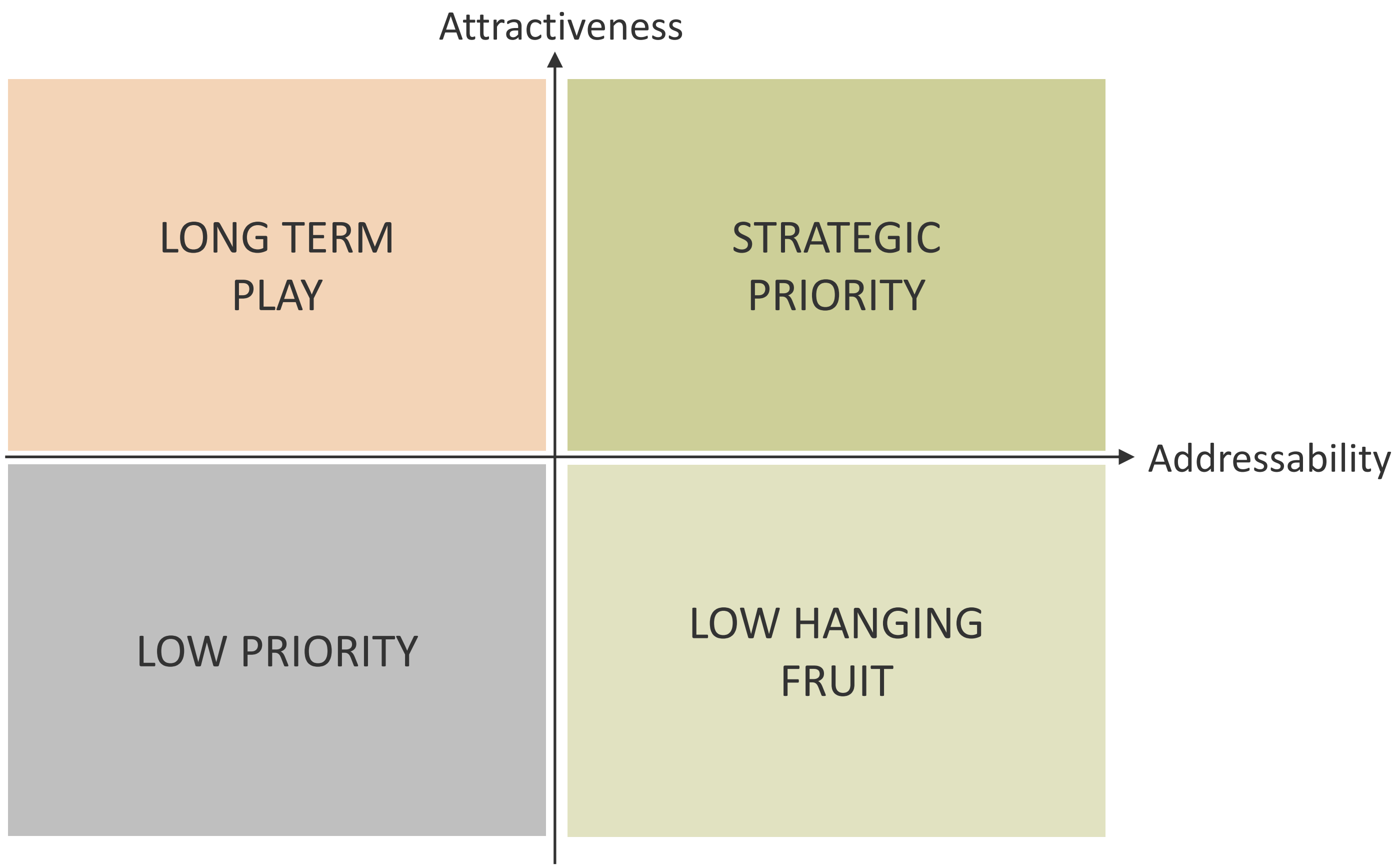
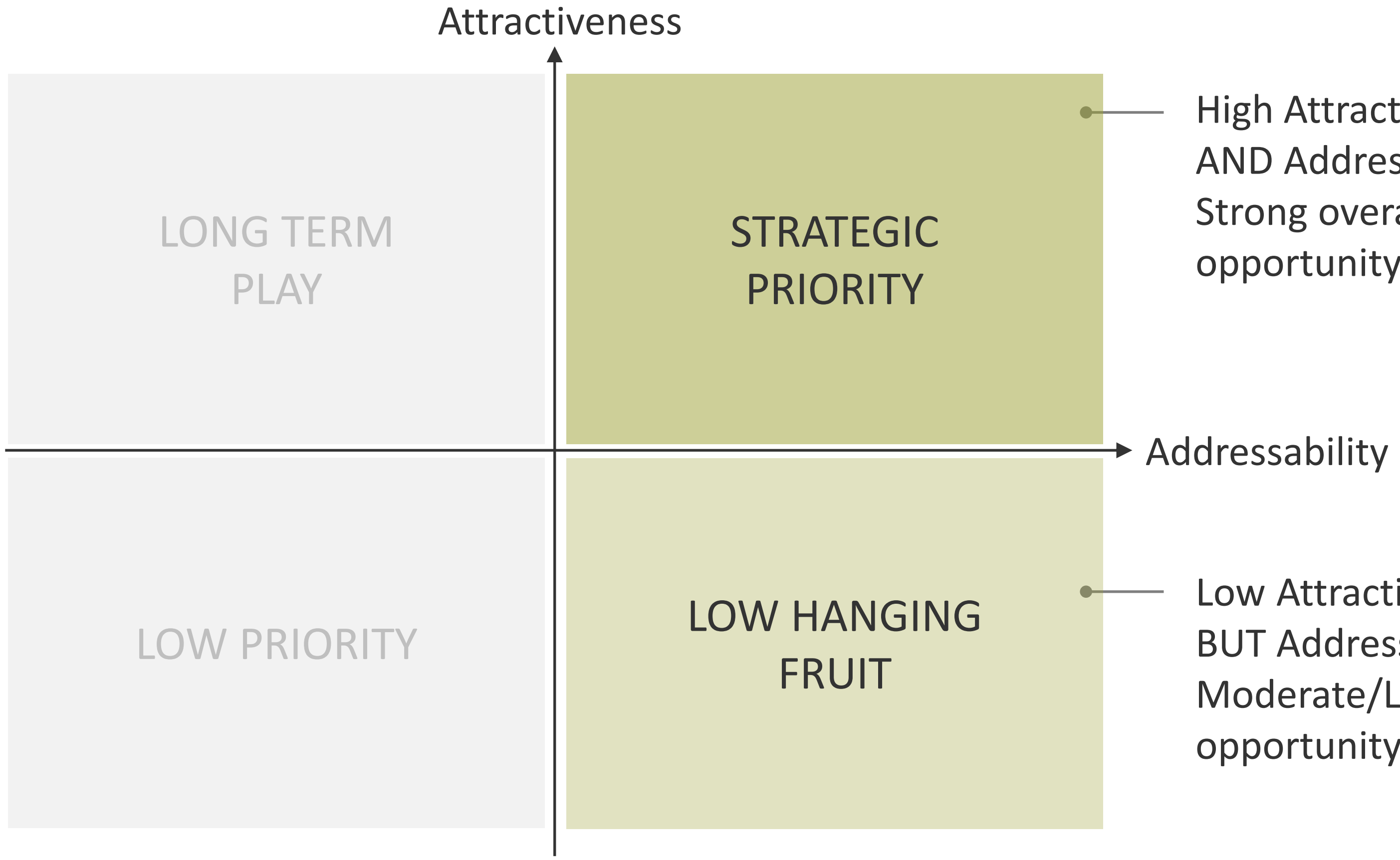
We bring this data together into a prioritisation matrix

The matrix will enable us to determine which markets represent a strong consumer opportunity for an Australian export commodity

We plot each market's metrics on a strategic matrix to identify priority markets based on consumer preference and behaviour



Markets on the right-hand side of the matrix represent more attractive consumer opportunities for export and investment is more likely to generate a return



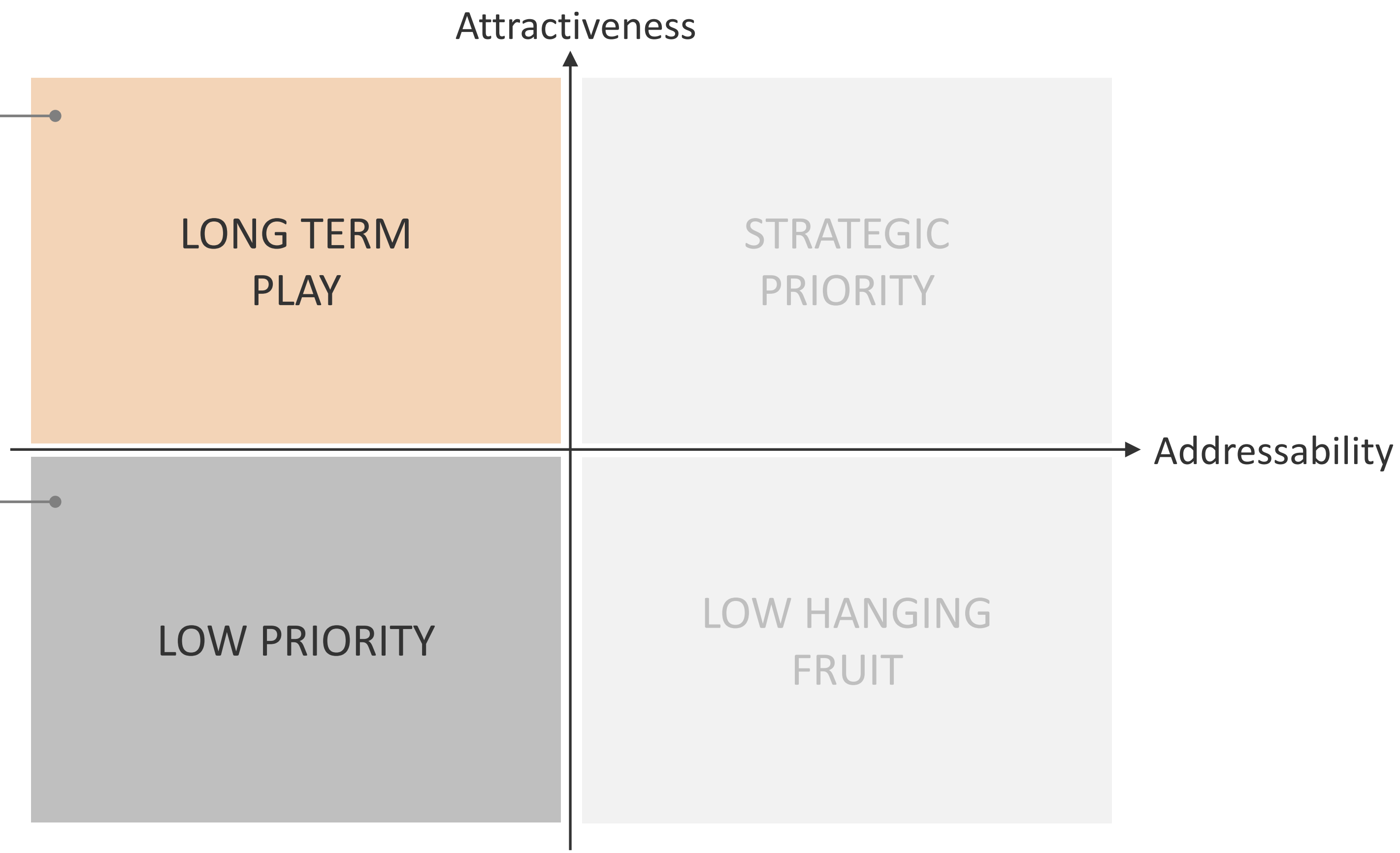
High Attractiveness
AND Addressability
Strong overall consumer export opportunity

Low Attractiveness
BUT Addressability
Moderate/Low consumer export opportunity but easier to realise

By contrast, markets on the left-hand side of the matrix may require more investment with a longer term pay-off or minimal to no returns

High Attractiveness
BUT Low Addressability
Moderate consumer export opportunity and potentially more investment to realise

Low Attractiveness
AND Low Addressability
Low consumer export opportunity and any investment may not generate a return



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3.1

Apples

i. Market prioritisation

Leverage the strategic framework to prioritize markets based on consumer behaviour, perception and market access

ii. Commodity profiling

In-depth data profiling of how the commodity is consumed across markets, premium triggers and barriers

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4 key considerations when interpreting the outputs of the Market Prioritisation

1. No Existing Technical Market Access

2. Markets with Existing Trade

3. Premium Opportunities

4. Focus of Investment

1. No Existing Technical Market Access

Existing technical market access for a commodity was **intentionally NOT included** in the evaluation of addressability

Rationale:

- This project was designed to identify attractive and addressable **future** growth geographies therefore the analysis was not restricted by current arrangements
- This research is intended to **support and inform industry** decisions regarding the progress of any potential future or ongoing market access or market improvement request

2. Markets with Existing Trade

While the addressability calculation includes data on general market access and trade, it intentionally does not include whether Australia currently trades in a particular commodity

Rationale:

- The objective of this analysis is to provide an objective assessment of whether a market is attractive and addressable independent of current arrangements
  - If a market that we are currently trading with for a particularly commodity is shown NOT to be a ‘Strategic Priority’, this does NOT mean that we should consider withdrawing from this market.
  - However, we recommend re-evaluating the relative focus of investment in this market, and consider other markets when looking for **future** growth opportunities

3. Premium Opportunity

In evaluating attractive and addressable export markets, we have intentionally used data that shows where premium opportunities can be found

Rationale:

- The overall objective of this project was to identify **profitable** growth opportunities for commodities in the future, and Australian commodities will have more chance of growing profitably where they have a better chance for commanding a price premium
  - High commodity penetration in a market has also been used to evaluate attractiveness, but this analysis favours markets where there is a larger opportunity for Australian products to command a **premium**.

4. Focus of Investment

The evaluation and prioritisation of export markets into the 4 quadrants of attractiveness and addressability **is intended to be only one input into decision making** about **where to focus investment**

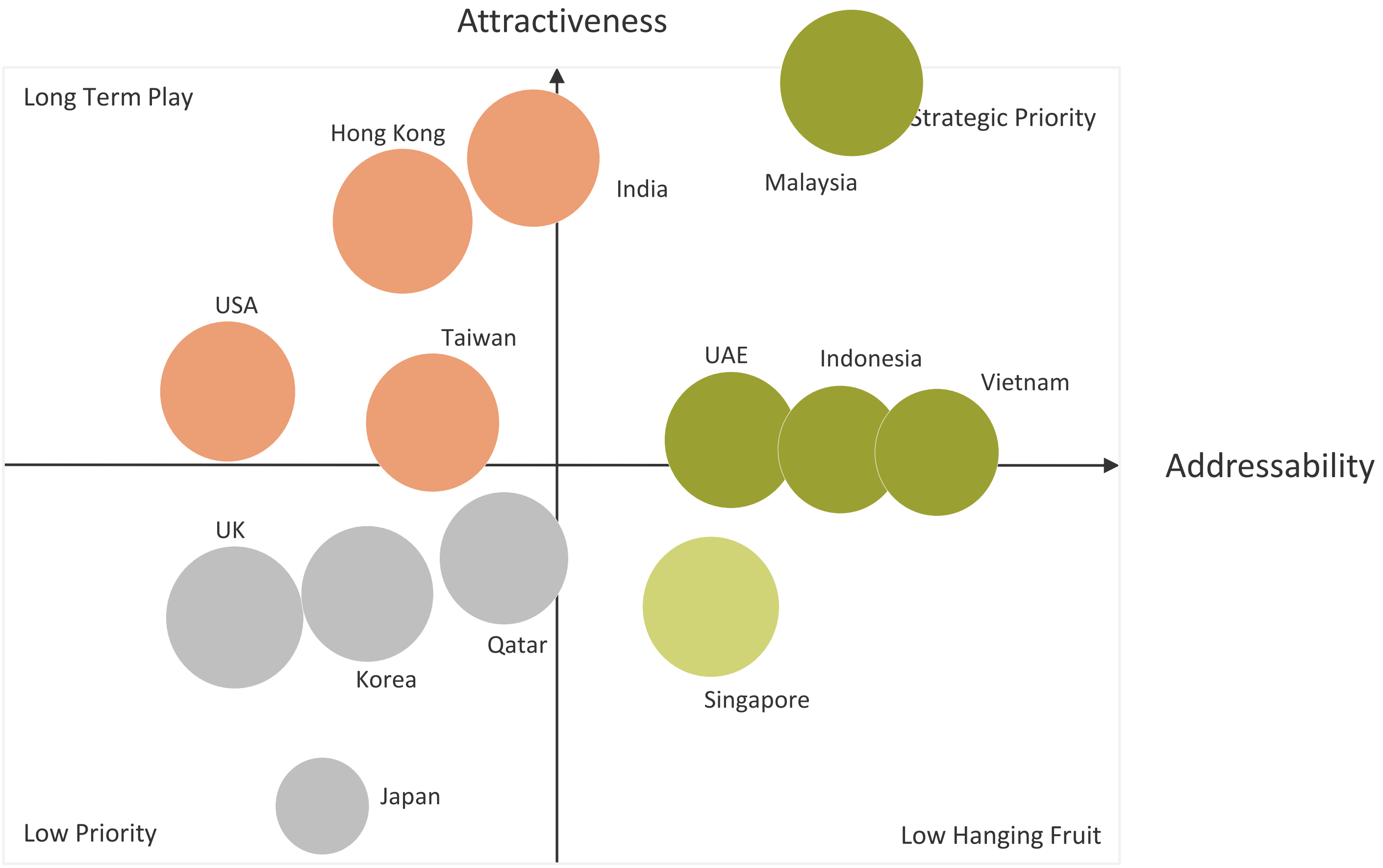
Rationale:

- The objective of this project was primarily to offer a consumer lens into commodity consumption, to enable export decisions to be informed by more robust consumer data (while still included additional market factor data from previous Deloitte analysis)
  - Export decisions should be made using all available information including the economics of local growers and exporters and this report forms one input into that decision process

We have identified 2 strategic priority markets that represent the most attractive and appealing export opportunity for Australian apples, based on consumer preference and behaviour

- Strategic priority
- Low hanging fruit
- Long term play
- Low priority

Size of the bubble = penetration



Source: Kantar HIA International Demand Study 2022, World Bank 2021

Apples: Summary of Strategic Priorities

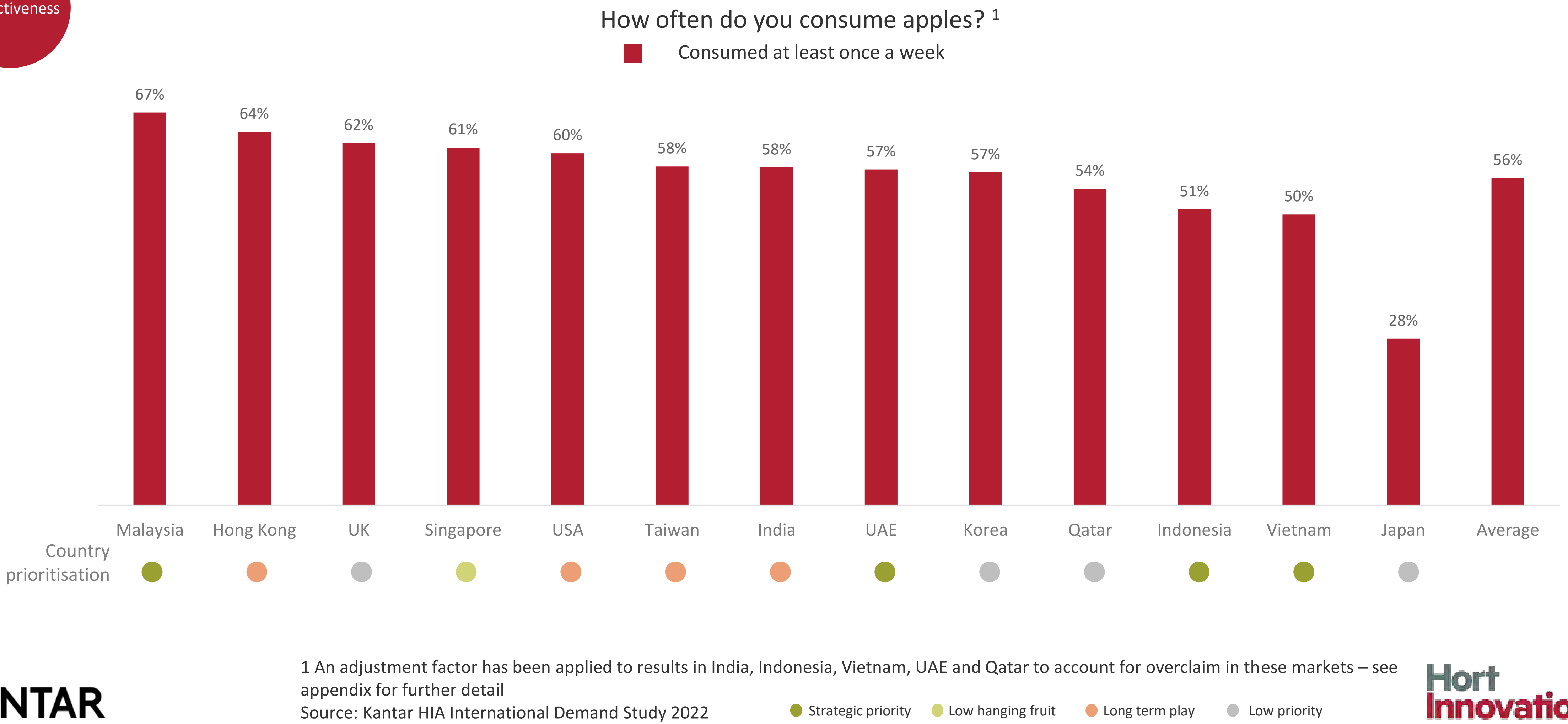
Apple

	Malaysia	Vietnam	Indonesia	UAE
STRATEGIC IMPLICATIONS	Apples are widely consumed in Malaysia – this market has the strongest penetration and there's a possible premium opportunity. It's attractive from a market access perspective and there's strong Australian appeal	Despite lower market access attractiveness, Vietnam also represents a strong Apples export opportunity given the high appeal of Australian apples	Indonesia has moderate apples penetration, but high Australian appeal which, alongside moderate market access addressability and likelihood for paying 1.5x more	Consumers in the UAE have a high willingness to pay more, especially for Australian apples. The strong penetration and high Australian appeal boosts this opportunity, despite the smaller population
ATTRACTIVENESS	• Highest market penetration (67% at least once a week) • Highest claimed willingness to pay 1.5x more	• Moderate apples penetration • High claimed likelihood for paying 1.5x more	• Moderate apples penetration • High claimed likelihood for paying 1.5x more	• High apples penetration • Claimed willingness to pay 1.5x more is on par with other markets, but income per capita is high despite small population
ADDRESSABILITY	• High Australian appeal • Lower willingness to pay for premium quality	• High Australian appeal: Strongest claimed likelihood of any market to buy apples imported from Australia • Moderate willingness to pay for premium quality	• High Australian appeal • Moderate willingness to pay for premium quality	• High Australian appeal • High willingness to pay for premium quality

Apples are a very widely consumed commodity; 2 in 3 consume weekly across several markets, notably Malaysia, Hong Kong and the UK

Apple

Attractiveness



1 An adjustment factor has been applied to results in India, Indonesia, Vietnam, UAE and Qatar to account for overclaim in these markets – see appendix for further detail

Source: Kantar HIA International Demand Study 2022

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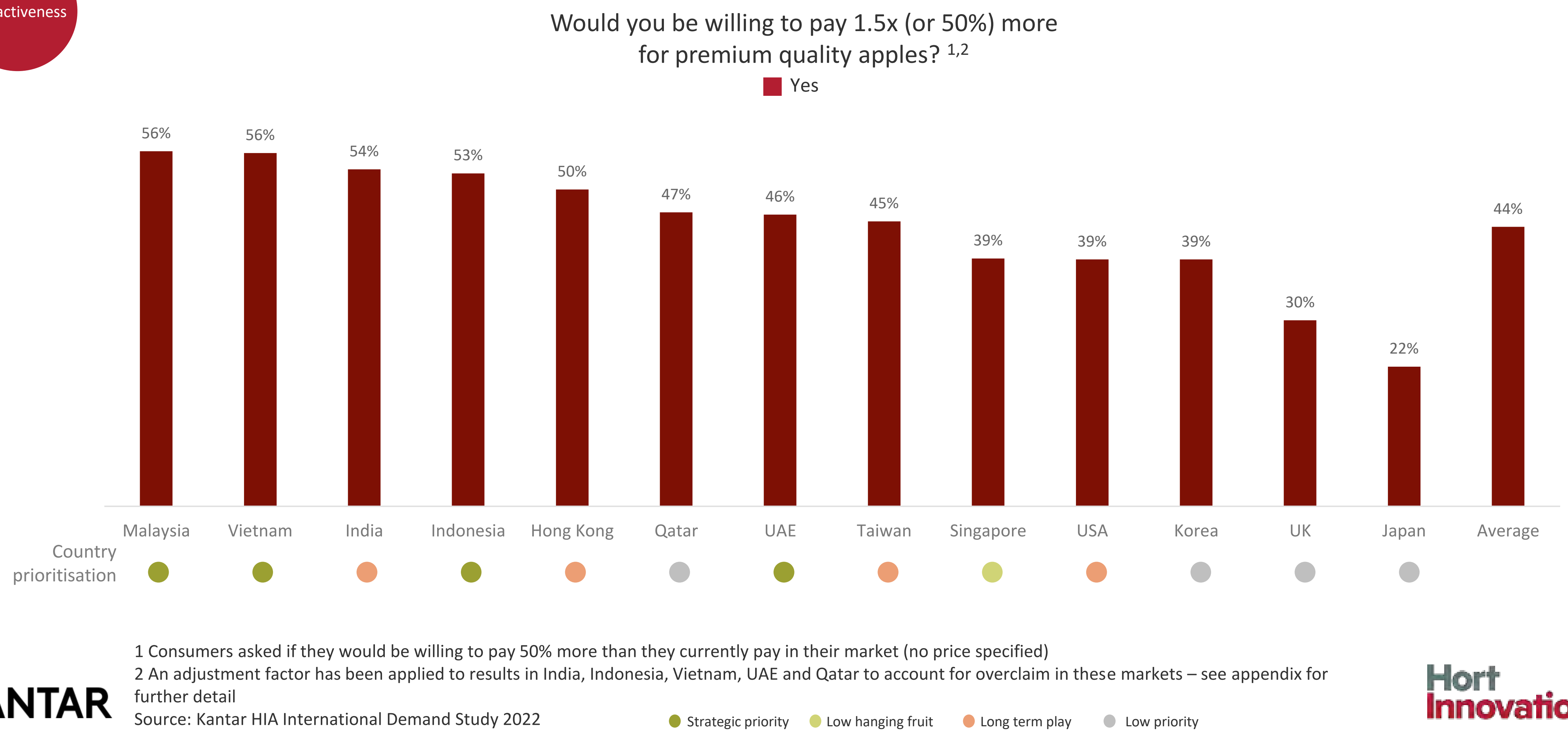
Respondents claim a willingness to pay more for quality applies in those markets where they're less widely consumed: Malaysia, Vietnam and India

Apple

Attractiveness



1 Consumers asked if they would be willing to pay 50% more than they currently pay in their market (no price specified)

2 An adjustment factor has been applied to results in India, Indonesia, Vietnam, UAE and Qatar to account for overclaim in these markets – see appendix for further detail

Source: Kantar HIA International Demand Study 2022

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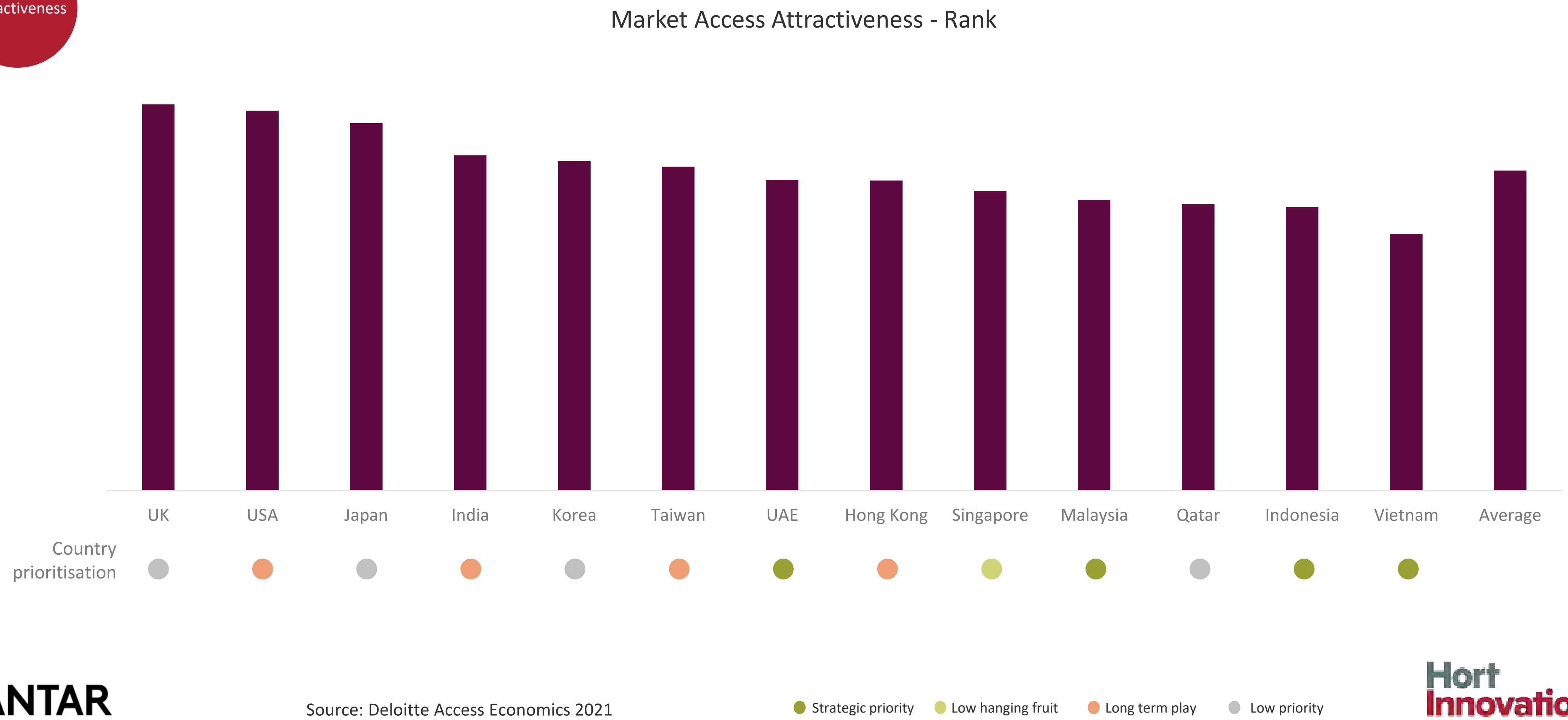
Although all markets are attractive, more affluent markets with larger populations rank more highly

Attractiveness

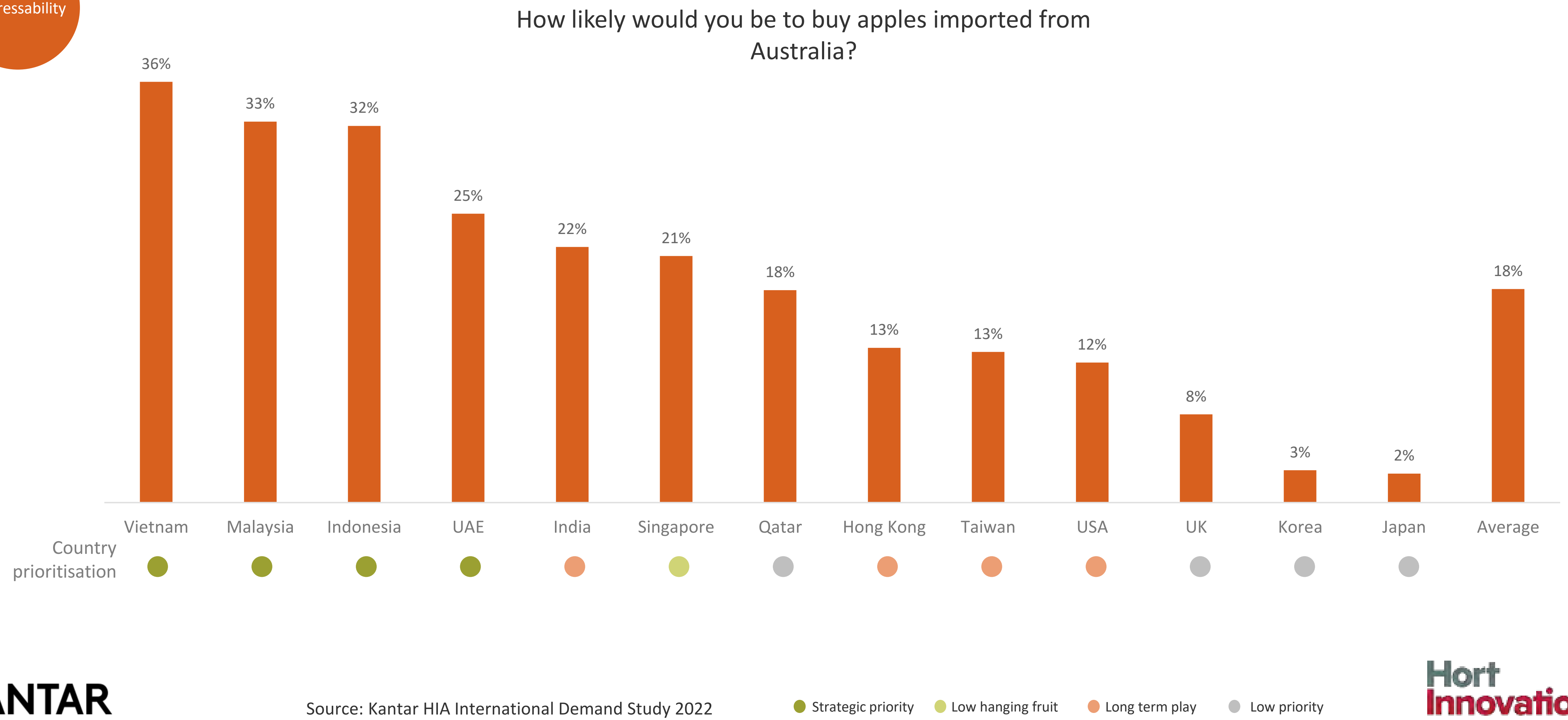


Source: Deloitte Access Economics 2021

Apples have a weaker Australian appeal vs. other commodities overall, but there's stronger association in Vietnam, Malaysia and Indonesia

Apple

Addressability



Source: Kantar HIA International Demand Study 2022

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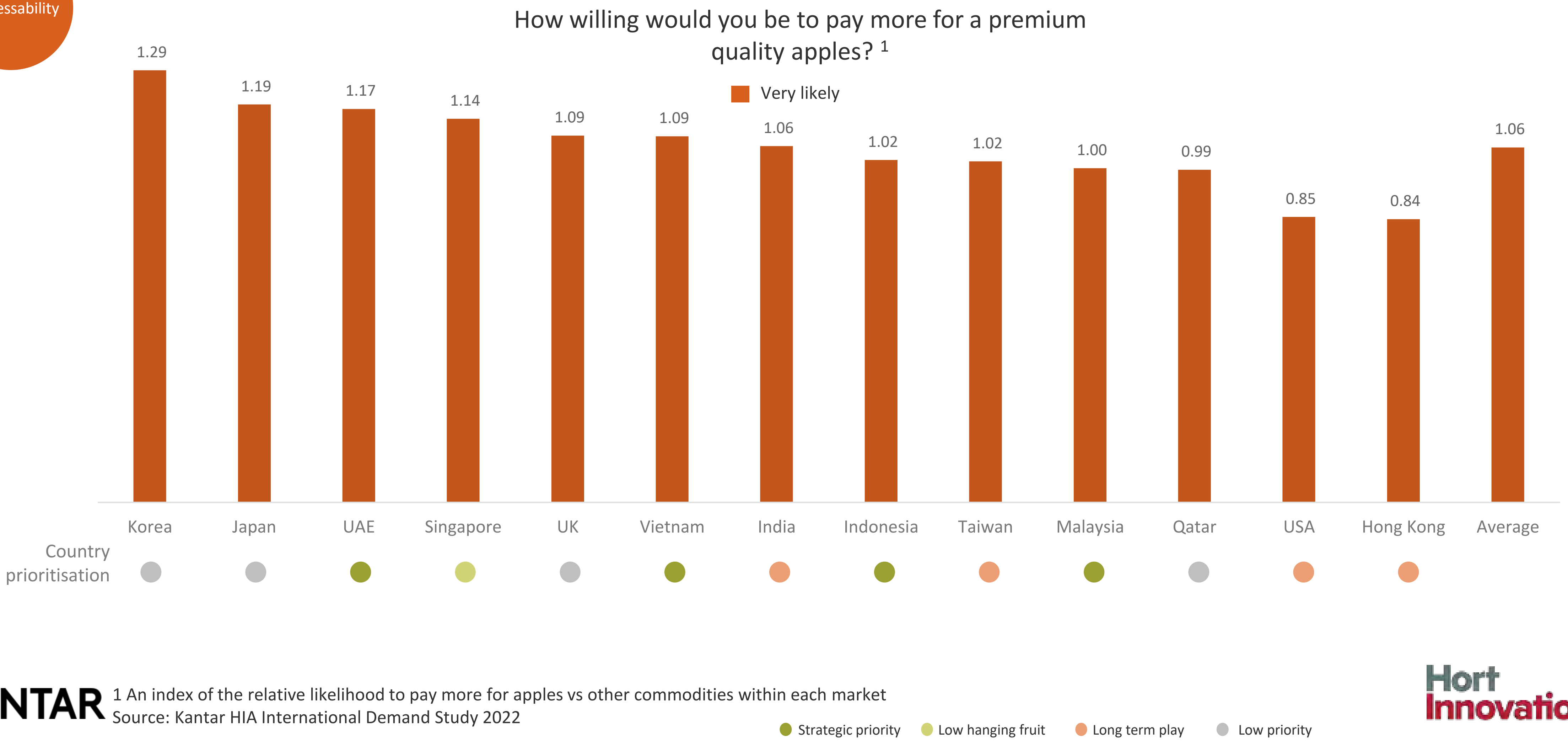
Relative desire for premium vs other commodities is strongest in Korea, Japan and the UAE where penetration is lower

Apple

Addressability



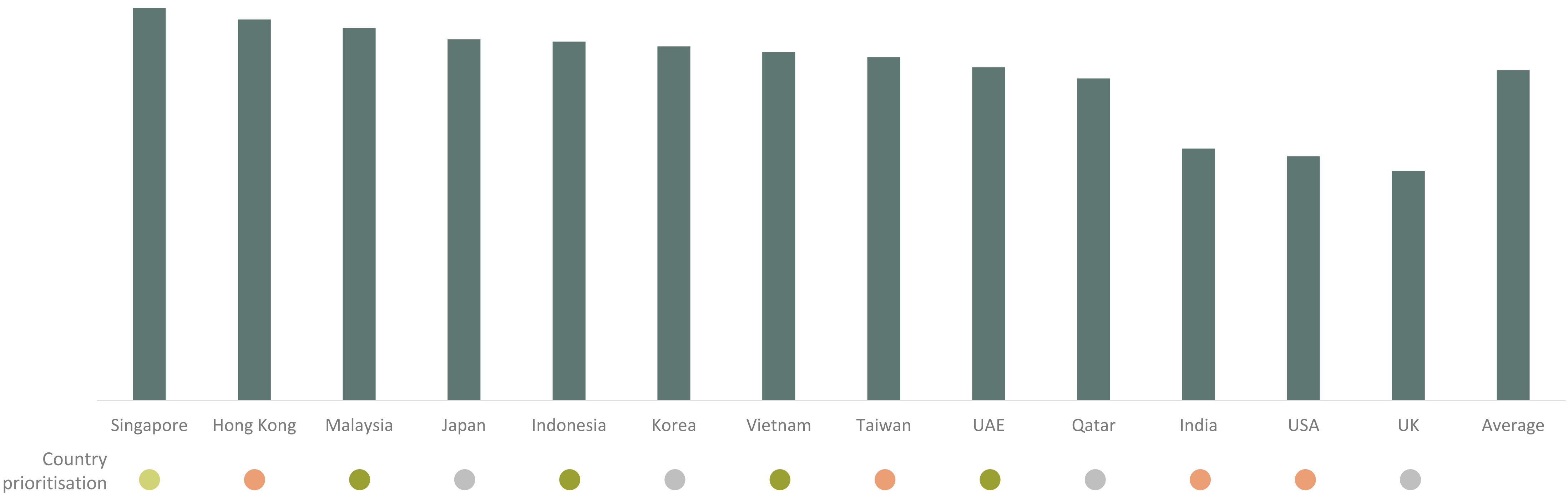
1 An index of the relative likelihood to pay more for apples vs other commodities within each market
Source: Kantar HIA International Demand Study 2022

Apple

Some markets rank as more addressable due to the ease of trade, market risk and value chain competitiveness

Addressability

Market Access Addressability - Rank



Source: Deloitte Access Economics 2021

Strategic priority · Low hanging fruit · Long term play · Low priority

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3.1

Apples

i. Market prioritisation

Leverage the strategic framework to prioritize markets based on consumer behaviour, perception and market access

ii. Commodity profiling

In-depth data profiling of how the commodity is consumed across markets, premium triggers and barriers

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The prioritisation revealed x4 markets ripe for Apple export.
The next section will deep dive into Apple consumption across markets

Apple

	USA	UK	Singapore	India	Japan	Hong Kong	South Korea
Market priorities	Long term play	Low priority	Low hanging fruit	Long term play	Low priority	Long term play	Low priority

	Malaysia	UAE	Qatar	Taiwan	Vietnam	Indonesia
Market priorities	Strategic priority	Strategic priority	Low priority	Long term play	Strategic priority	Strategic priority

Strategic priority Low hanging fruit Long term play Low priority

Apples consumption snapshot

Apple

	Malaysia	Vietnam	Indonesia	UAE
HOW OFTEN (P1W pen.)	67%	50%	51%	57%
WHEN	Snack Dinner	Lunch Dinner	Snack Breakfast	Breakfast Snack
HOW	Fresh on its own	Fresh on its own	Fresh on its own As part of a snack	Fresh on its own Fresh as part of a meal
WHY	Quick & Easy Tasty	Tasty Quick & Easy	Tasty Quick & Easy Health & Nutrition	Tasty Physical & Mental Energy
WHERE	At home	At home	At home	At home
WHO WITH	By themselves With Family	With Family	With Family	By themselves With Family

Source: Kantar HIA International Demand Study 2022

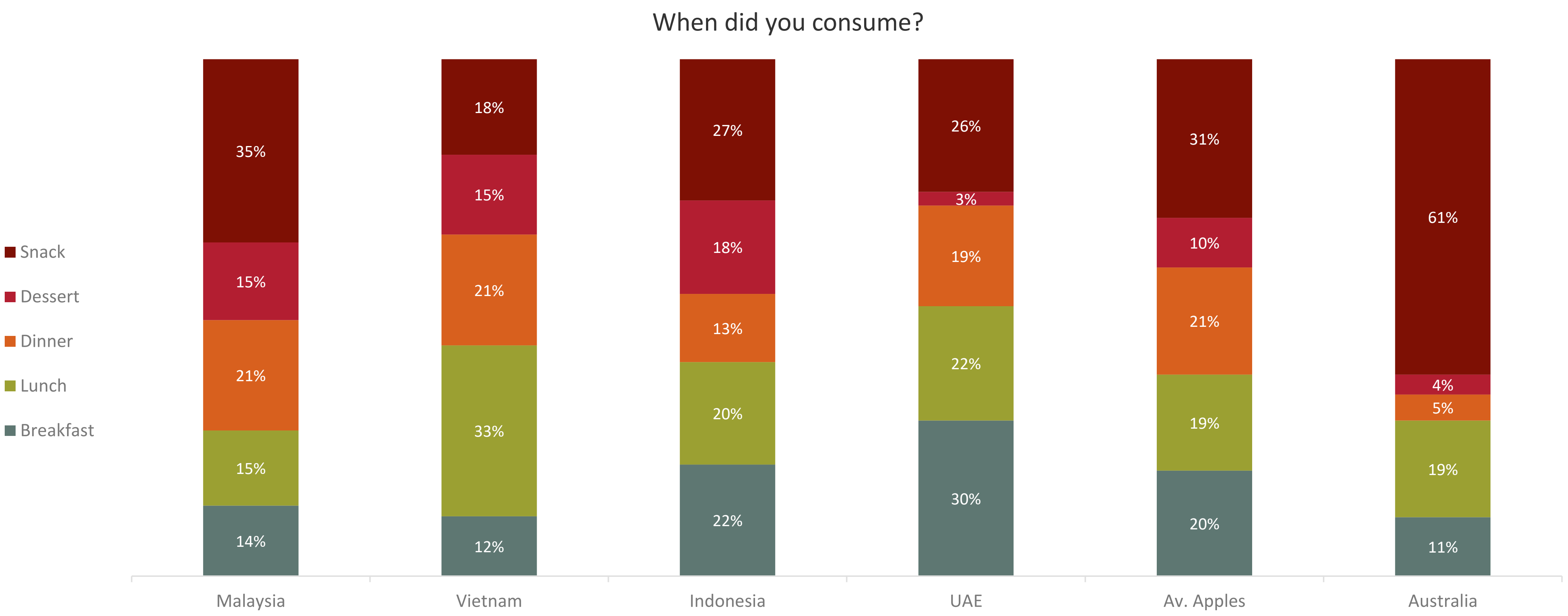
Apples: Strategic Imperatives

Apple

	Malaysia	Vietnam	Indonesia	UAE
CONSUMER PREFERENCES	As a tasty, quick & easy snack or dinner, fresh on its own, at home with family or by themselves	As a tasty, quick & easy option for lunch or dinner, fresh on its own, at home with family	As a tasty, quick & healthy snack or breakfast, fresh on its own or as part of a snack, at home with family	As a tasty breakfast/snack for physical and mental energy, fresh on its own or fresh as part of a meal, at home with family or by themselves
NEEDS TO SATISFY	Quick & Easy Tasty	Tasty Quick & Easy	Tasty Quick & Easy Health & Nutrition	Tasty Physical & Mental Energy
FUNCTIONAL ATTRIBUTES	Refreshing Taste Fresh & Light	Refreshing taste To aid digestion	Fresh & Light Refreshing taste Sweet	Fresh & Light Refreshing Taste
PREMIUM OPPORTUNITY	Fresher Free from pesticides	Fresher More Appetising	Fresher Free from pesticides	Fresher I trust its safety
BARRIERS TO OVERCOME	Too expensive More exciting alternatives	Bruises easily Too expensive	Too expensive More exciting alternatives	Not filling enough Expires quickly
KEY SUBSTITUTES	Bananas Mangoes	Bananas Mangoes	Mangoes Bananas	Bananas Table Grapes

Apples as a snack across priority markets or lunch in Vietnam or breakfast in Indonesia and UAE

Apple

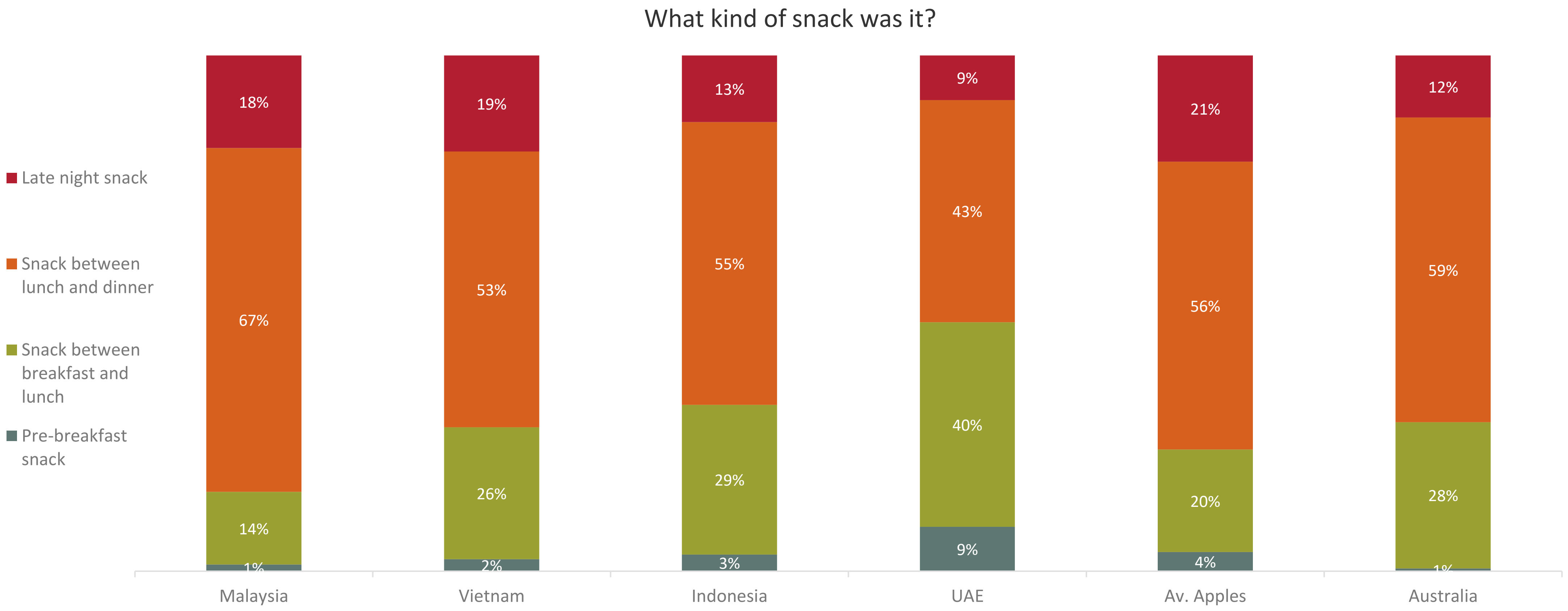


Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	220	227	221	238	230	227	220	165	221	233	227	226	30

When consumed as a snack, Apples are consumed between lunch and dinner or between breakfast and lunch in UAE

Apple



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Source: Kantar HIA International Demand Study 2023

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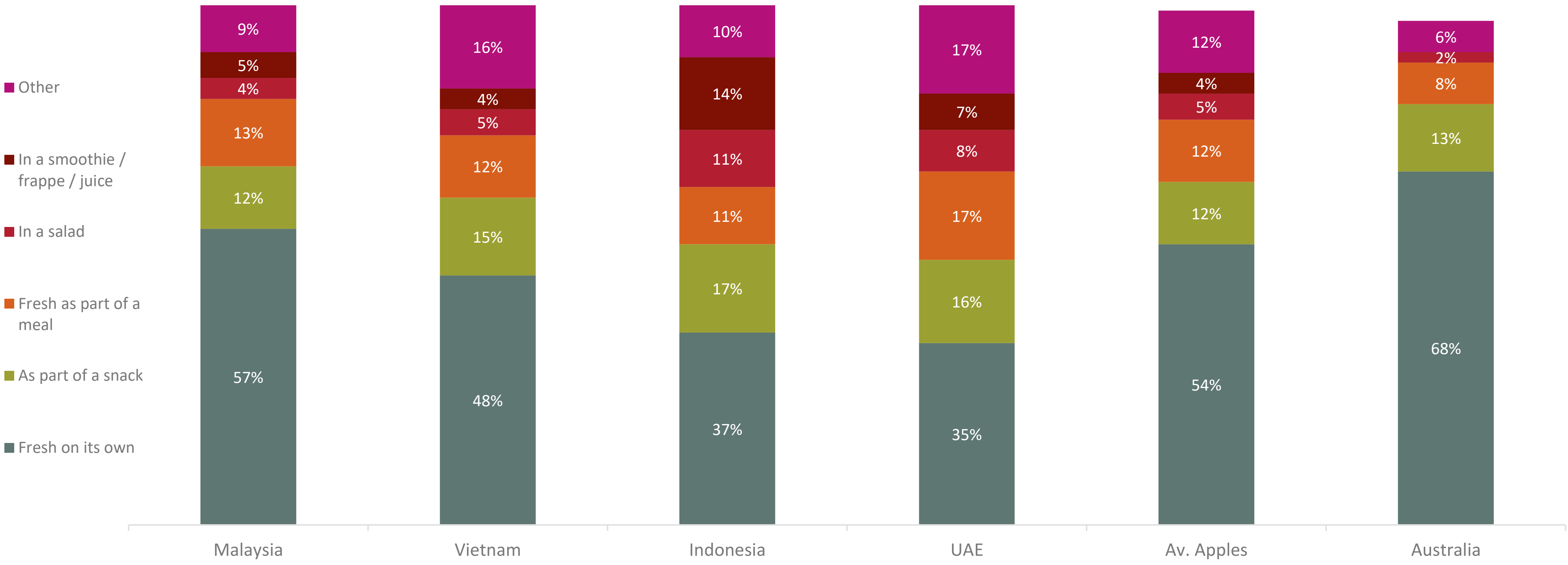
Apples are consumed fresh on their own, especially in Malaysia and Vietnam, or as part of a snack

Apple

How did you consume?



‘Other’ = As an ingredient in baking, Cooked on its own, As a topping (e.g., on yoghurt, as a garnish etc.), As an ingredient in cooking, As part of an alcoholic drink e.g. cocktail, Don't know, To make baby food / puree, For decoration / show only and Don’t Know

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	220	227	221	238	230	227	220	165	221	233	227	226	30

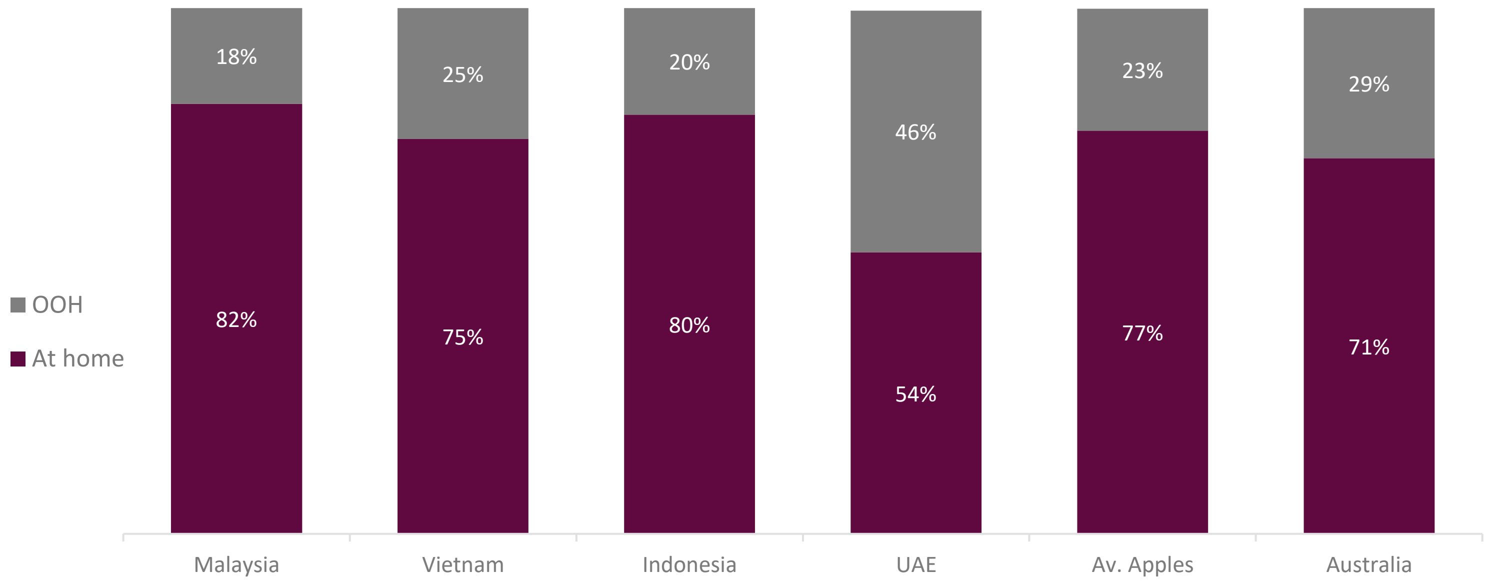
Most people consume Apples at home though UAE skews more out of home

Apple

Where were you?

77%

of consumption of apples is in the home, this varies only slightly by market



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Source: Kantar HIA International Demand Study 2023

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	220	227	221	238	230	227	220	165	221	233	227	226	30

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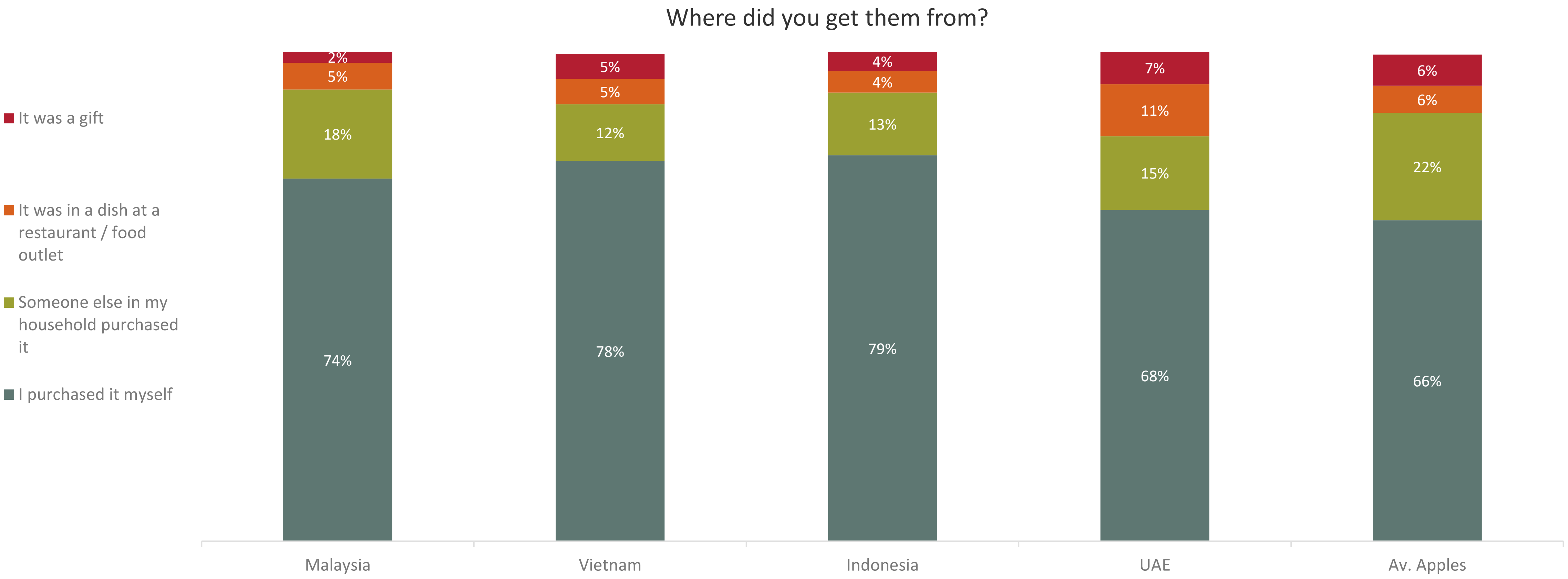
Most people purchase Apples themselves

Apple



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	220	227	221	238	230	227	220	165	221	233	227	226	30

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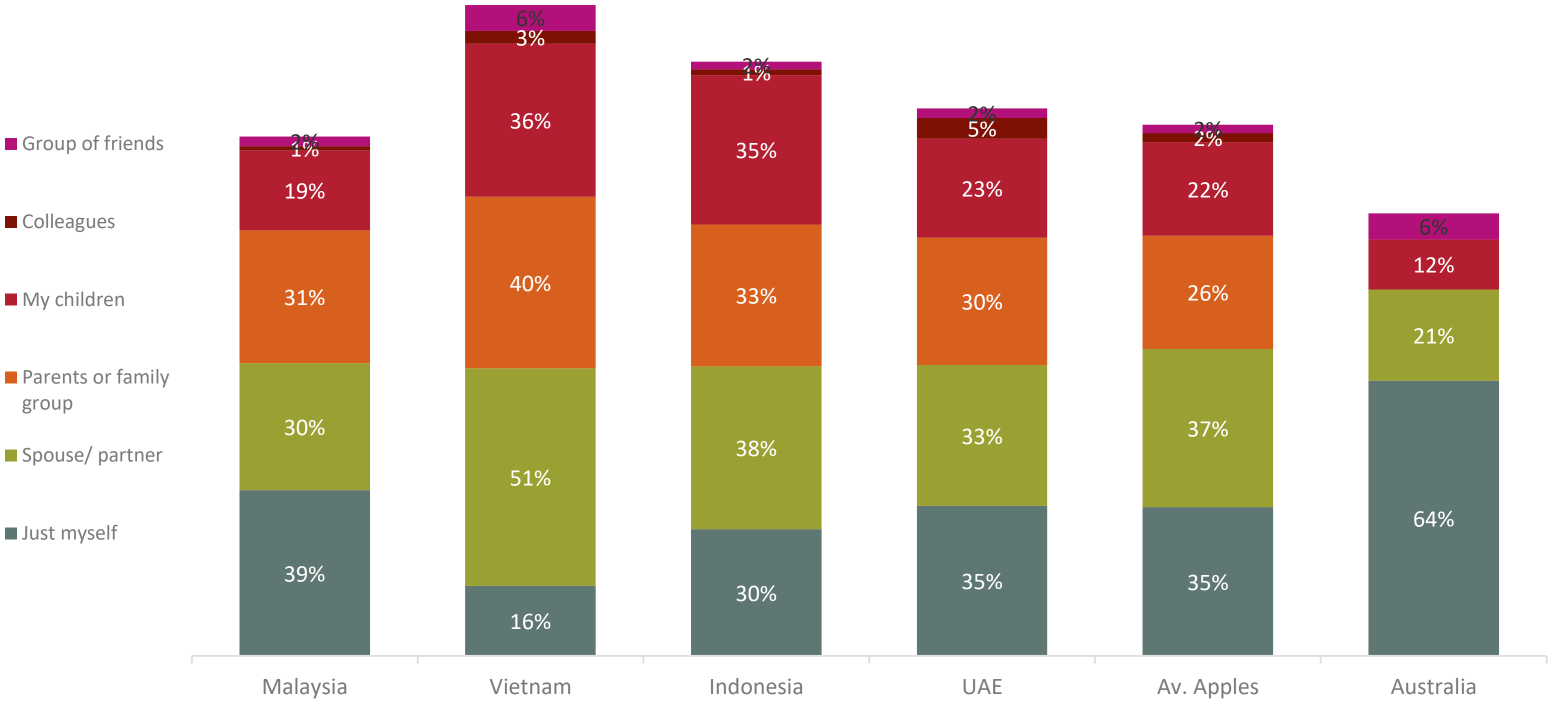
Apples are consumed alone (except Vietnam), with a spouse or partner or broader family group

Apple

Who were you with?

37%

of consumption of apples (on average) is with a spouse/partner.



KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	220	227	221	238	230	227	220	165	221	233	227	226	30

Hort Innovation

There is a range of reasons why people choose to eat different fruits & vegetables. There are
6 universal consumer needs pillars that drive this choice for consumers globally

The 6 needs pillars are universal across commodities and global markets

Tasty

All about: Taste, Refreshment, and Enjoyment

Quick & Easy

All about: Convenience Simplicity, and Ease

Healthy & Nutritious

All about: Guilt-free, Nourishing and Sensible

Indulgence

All about: Comfort, Relaxation and Self Care

Physical & Mental Energy

All about: Energy, Uplift, and Reinvigoration

Connection

All about: Bonding, Celebration and Creating Memories

In priority markets, the most important reasons why people choose to consume Apples are for something tasty, quick & easy and healthy & nutritious

53%

of people in priority markets consume Apples for something

Tasty

52%

of people in priority markets consume Apples for something

Quick & Easy

45%

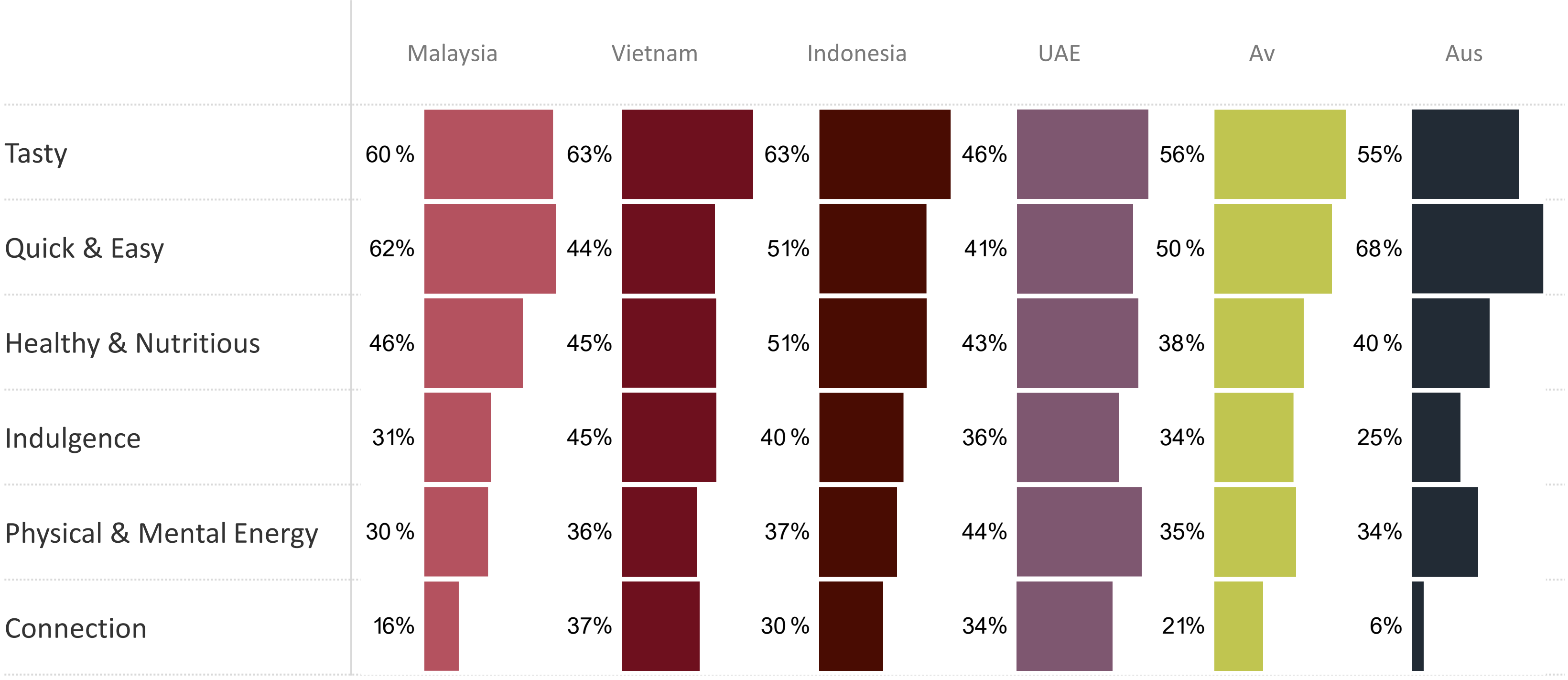
of people in priority markets consume Apples for an

Healthy & Nutritious

Apple

Taste is the most important consumption driver across all markets, followed by Quick & Easy in Malaysia and Physical & Mental energy in UAE

Which were important when choosing to consume?



KANTAR

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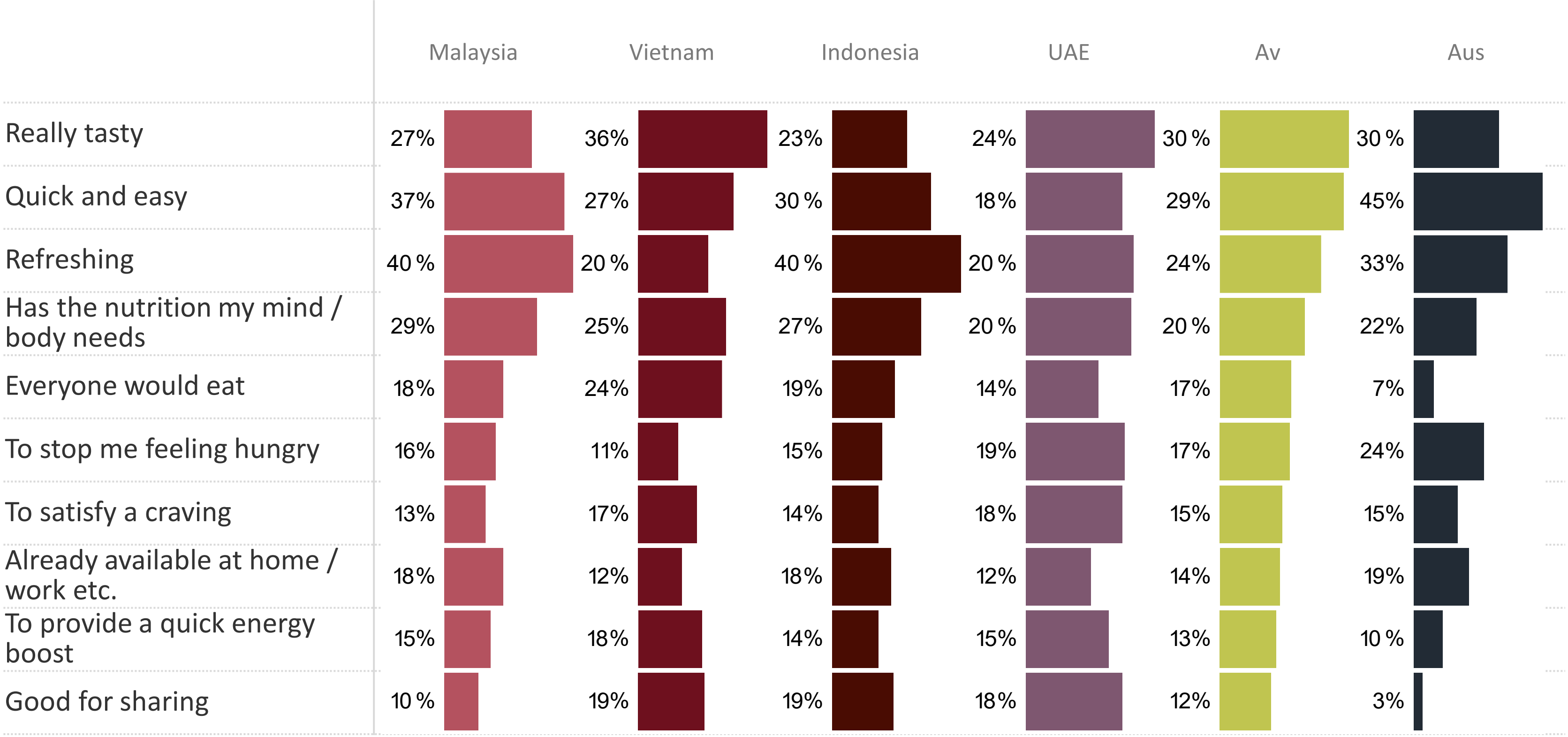
	220	227	221	238	230	227	220	165	221	233	227	226	30

Hort Innovation

When we look in more detail, ‘really tasty’ is important across priority markets along with ‘refreshing’ and ‘quick and easy’ in Malaysia

Apple

Which were important when choosing to consume?



KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	220	227	221	238	230	227	220	165	221	233	227	226	30

Hort Innovation

More functionally, consumers are looking for Apples that are fresh and light with a refreshing, sweet taste

29%

of people in priority markets are looking for Apples that are

Fresh / Light

28%

of people in priority markets are looking for Apples that have

Refreshing Taste

24%

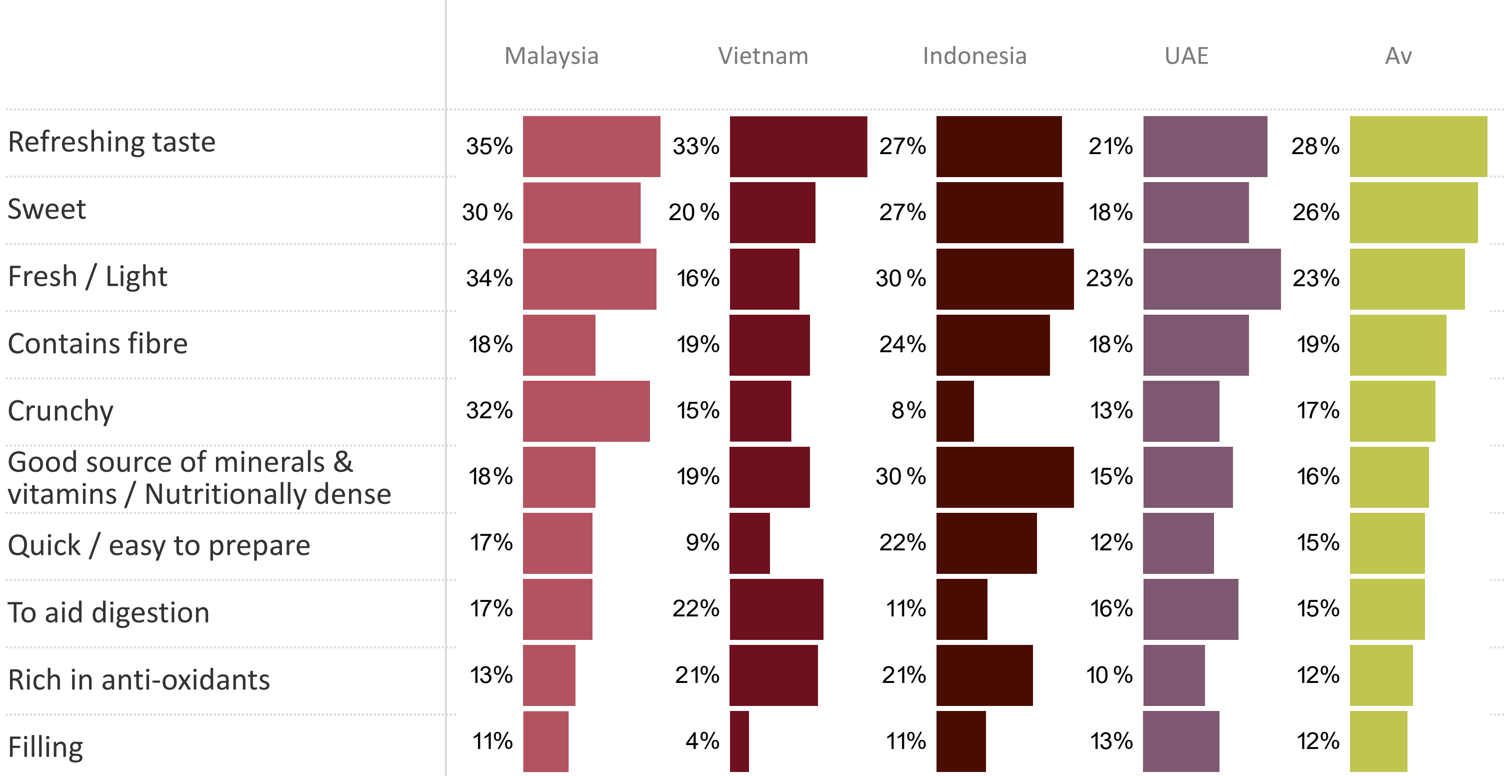
of people in priority markets are looking for Apples that are

Sweet

Consumers are looking for apples to have a refreshing taste and be fresh and light in Malaysia and UAE

Apple

What were you looking for when you consumed?



When it comes to the premium opportunity, consumers are looking for Apples that are fresher, free of pesticides, sweeter and safe & trusted

46%

of people in priority markets are looking for premium Apples that are

Fresher

28%

of people in priority markets are looking for premium Apples that are

Free from pesticides

26%

of people in priority markets are looking for premium Apples that are

Sweeter

26%

of people in priority markets are looking for premium Apples that are

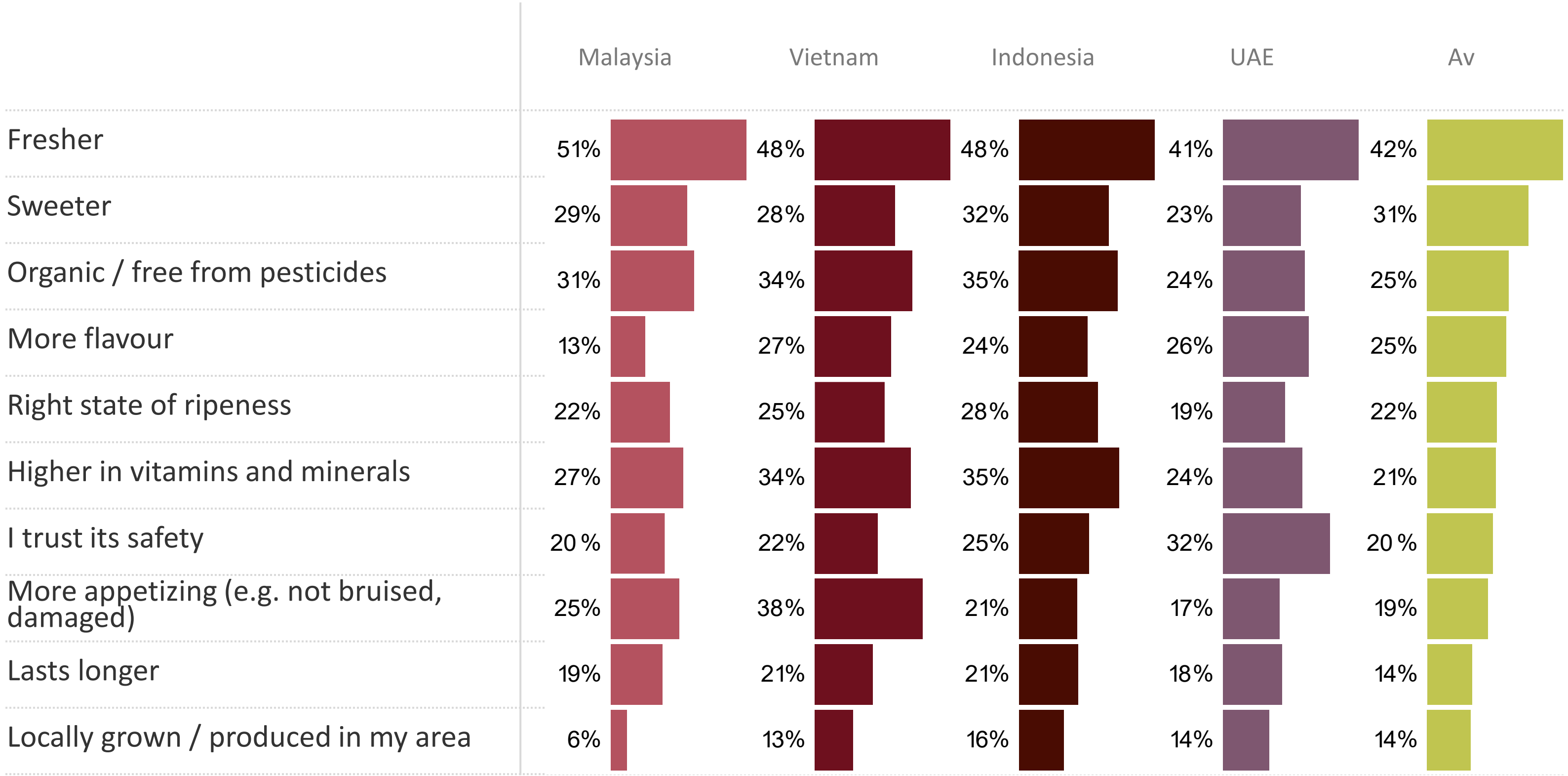
Safe & Trusted

Source: <sources here, divided by a semi-colon; all on one line>

Consumers look for freshness in premium Apples. In Malaysia, sweetness and free from pesticides is important as well as safety in UAE

Apple

What does premium quality mean to you?



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Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	220	227	221	238	230	227	220	165	221	233	227	226	30

Hort Innovation

Price is the biggest barrier to overcome with Apple consumption, followed by exciting alternatives and bruising easily.

Bananas and Mangoes are considered worthy substitutes

Barriers to Consumption

Price	Exciting Alternatives	Bruise Easily
18% (priority market average)	18% (priority market average)	16% (priority market average)

Leading Substitutes

Bananas	Mangoes	Pear
43% (priority market average)	31% (priority market average)	25% (priority market average)

Price is a key barrier in Malaysia, followed by more exciting alternatives whereas in UAE Apples may not be filling enough

Apple

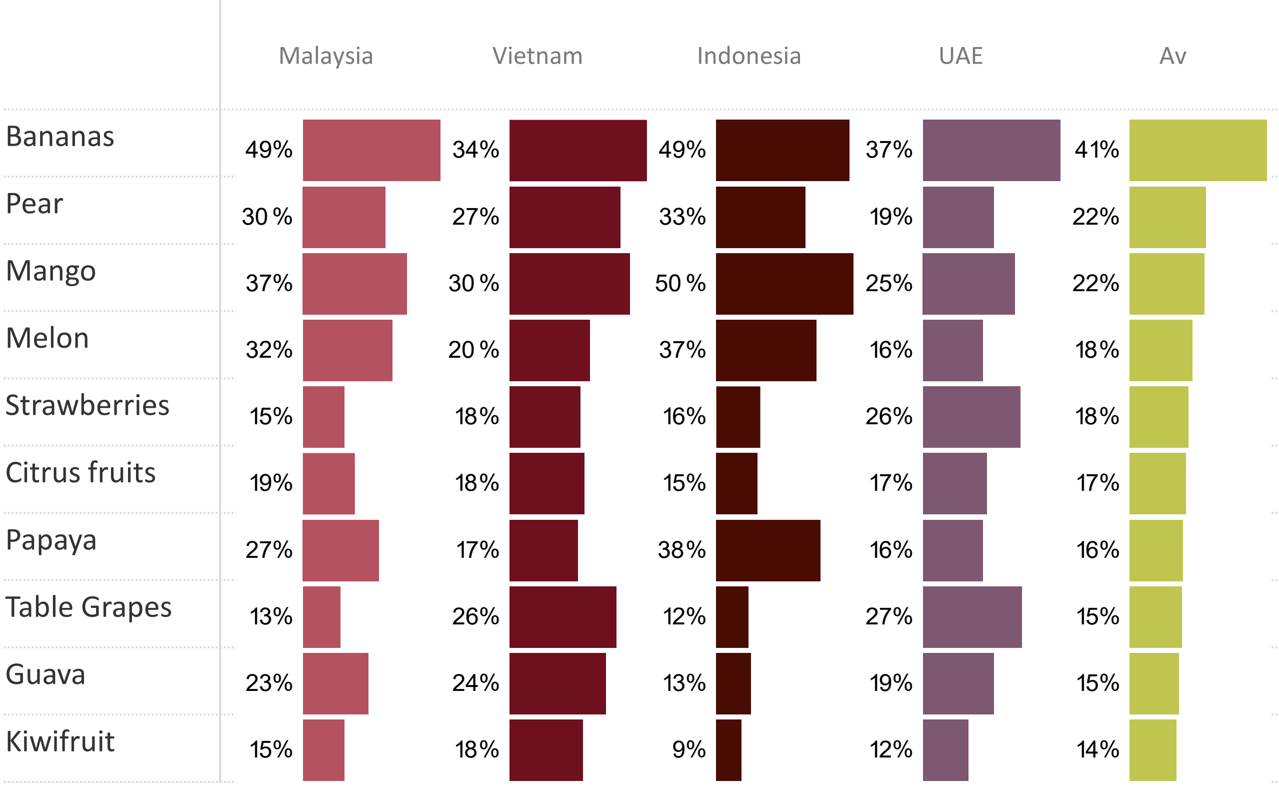
What are the reasons you may not choose?

	Malaysia	Vietnam	Indonesia	UAE	Av
It is too expensive	24%	24%	24%	12%	21%
There are more exciting alternatives	22%	19%	22%	13%	18%
It bruises easily	19%	33%	17%	13%	17%
Quality is often poor	20 %	21%	19%	12%	13%
It will not fill me up	10 %	9%	9%	15%	10 %
It goes off too quickly / it does not last	9%	17%	14%	14%	9%
The quantity is more than I typically need	7%	12%	11%	12%	9%
It contains too much sugar	7%	12%	6%	9%	8%
It is too messy to eat	5%	6%	6%	9%	8%
Not enough people in my household like it/them	8%	9%	9%	10 %	8%

Bananas and Mangos are key substitutes for Apples across markets

Apple

What else would you typically consider having instead?



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N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	220	227	221	238	230	227	220	165	221	233	227	226	30

Recommendation: How to drive export growth in Australian Apples

1. Focus on Strategic Priority Markets

Focus on markets where consumers are **willing to pay a premium** for quality Apples (ie. **Malaysia, Vietnam, Indonesia, UAE**). Leverage already **high appeal for Australian Apples across all priority markets**, to drive incremental growth in Australian Apple exports.

2. Deliver Core Consumer Needs

Deliver the core consumer needs across priority markets with Apples that are **refreshing, tasty**, and **sweet**. Ensure Apples are at or above par for being **high in nutritional value, fresh and light, that serve as a popular quick and easy any-time-of-day choice.**

3. Leverage Premium Advantage

Maximise the premium opportunity by delivering Apples that are fresher, free of pesticides, sweeter, and come from a safe and trusted source.

4. Reduce Consumption Barriers

Address perceptions that Apples are **too expensive, less exciting than alternatives, and bruise easily**, to minimise consumer drift to close substitutes like Bananas, Mangoes and Pears**.**

'Where to Play'

'How to Win'

KANTAR

3.2

Blackberries

i. Market prioritisation

Leverage the strategic framework to prioritize markets based on consumer behaviour, perception and market access

ii. Commodity profiling

In-depth data profiling of how the commodity is consumed across markets, premium triggers and barriers

Hort Innovation

4 key considerations when interpreting the outputs of the Market Prioritisation

1. No Existing Technical Market Access

2. Markets with Existing Trade

3. Premium Opportunities

4. Focus of Investment

1. No Existing Technical Market Access

Existing technical market access for a commodity was **intentionally NOT included** in the evaluation of addressability

Rationale:

- This project was designed to identify attractive and addressable **future** growth geographies therefore the analysis was not restricted by current arrangements
- This research is intended to **support and inform industry** decisions regarding the progress of any potential future or ongoing market access or market improvement request

2. Markets with Existing Trade

While the addressability calculation includes data on general market access and trade, it intentionally does not include whether Australia currently trades in a particular commodity

Rationale:

- The objective of this analysis is to provide an objective assessment of whether a market is attractive and addressable independent of current arrangements
    - If a market that we are currently trading with for a particularly commodity is shown NOT to be a ‘Strategic Priority’, this does NOT mean that we should consider withdrawing from this market.
    - However, we recommend re-evaluating the relative focus of investment in this market, and consider other markets when looking for **future** growth opportunities

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3. Premium Opportunity

In evaluating attractive and addressable export markets, we have intentionally used data that shows where premium opportunities can be found

Rationale:

- The overall objective of this project was to identify **profitable** growth opportunities for commodities in the future, and Australian commodities will have more chance of growing profitably where they have a better chance for commanding a price premium
  - High commodity penetration in a market has also been used to evaluate attractiveness, but this analysis favours markets where there is a larger opportunity for Australian products to command a **premium**.

4. Focus of Investment

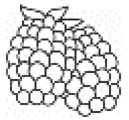
The evaluation and prioritisation of export markets into the 4 quadrants of attractiveness and addressability **is intended to be only one input into decision making** about **where to focus investment**

Rationale:

- The objective of this project was primarily to offer a consumer lens into commodity consumption, to enable export decisions to be informed by more robust consumer data (while still included additional market factor data from previous Deloitte analysis)
  - Export decisions should be made using all available information including the economics of local growers and exporters and this report forms one input into that decision process

74

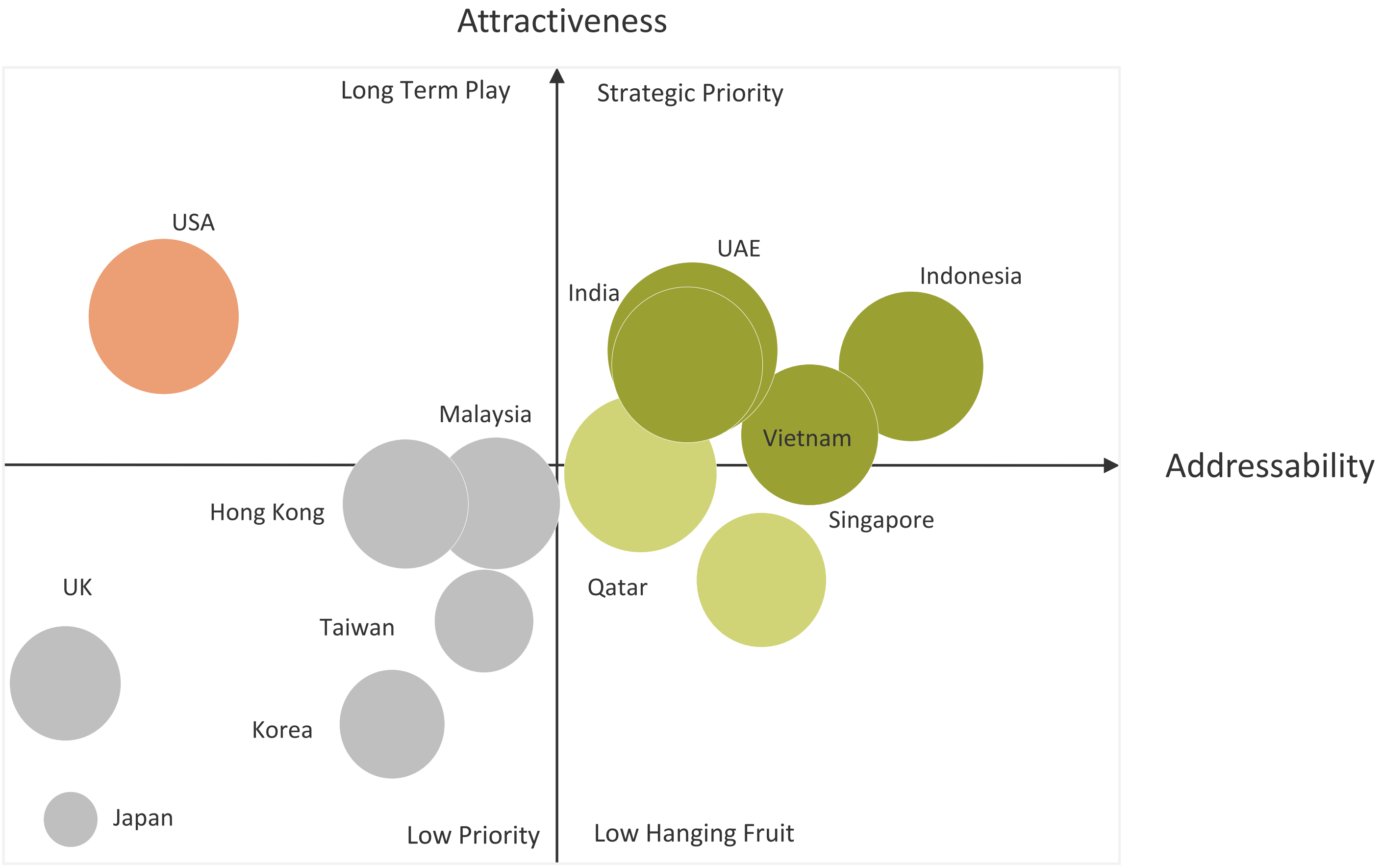
We have identified 4 strategic priority markets that represent the most attractive and appealing export opportunity for Australian blackberries, based on consumer preference and behaviour



Blackberries

- **Strategic priority**
- **Low hanging fruit**
- **Long term play**
- **Low priority**

Size of the bubble = penetration



Source: Kantar HIA International Demand Study 2022, World Bank 2021

Blackberries: Summary of Strategic Priorities

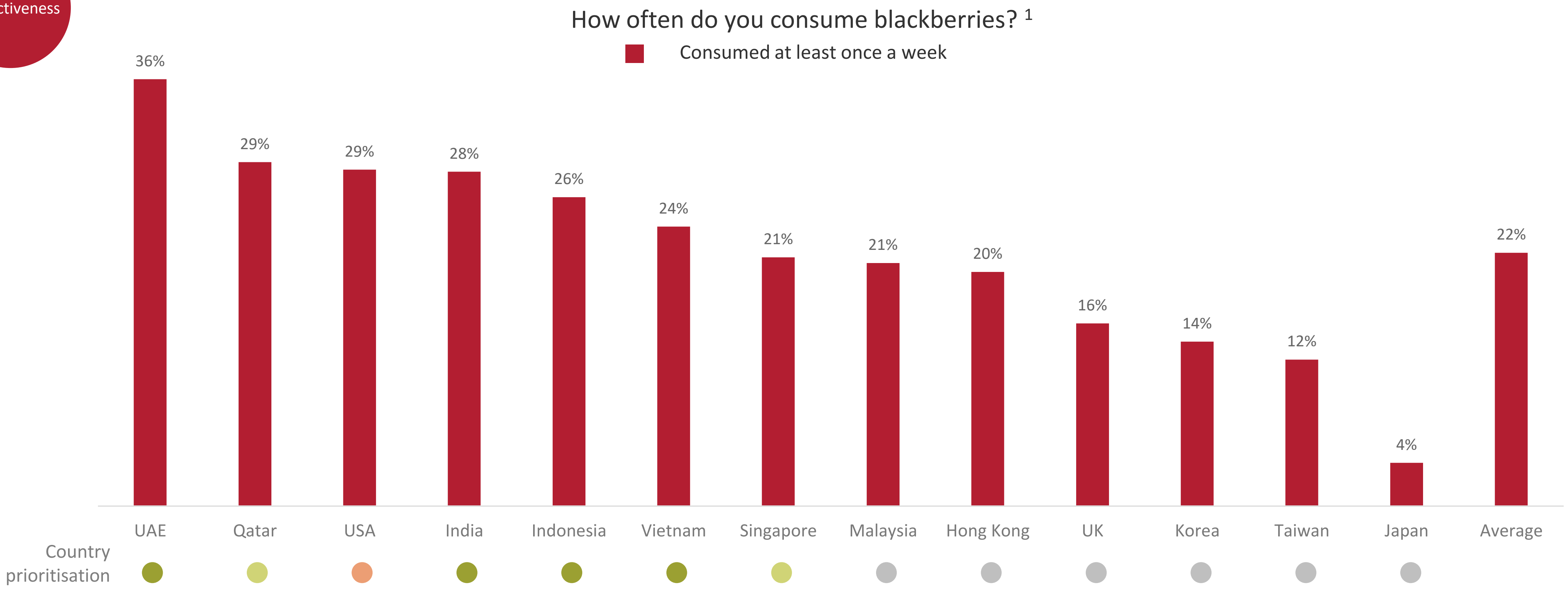
Blackberries

	Indonesia	Vietnam	UAE	India
STRATEGIC IMPLICATIONS	Indonesia is an attractive market opportunity for Australian export because, despite moderate penetration of the fruit, there's an addressable opportunity given the Australian appeal and high market access vs. other priority markets	Vietnam has more moderate penetration, therefore slightly lower attractiveness vs. Vietnam. Market access measures are also moderate, but claimed willingness to pay for premium and Australian appeal boosts the opportunity	The UAE has the strongest market penetration of blackberries, hence it's an attractive market for export, especially given higher per-capita income	India is an attractive export opportunity given blackberries are highly penetrated and the population is high. Market access is higher vs. other priority markets and there's a decent Australian appeal
ATTRACTIVENESS	• Moderate penetration • High willingness to pay 1.5x more	• Moderate penetration • High willingness to pay 1.5x more	• High penetration (strongest of all markets) • Moderate willingness to pay 1.5x more	• High penetration • Moderate willingness to pay 1.5x more • An attractive export market given high population
ADDRESSABILITY	• High likelihood to buy imported blackberries from Australian • Lower premium quality appeal vs. other commodities in this market	• Moderate Australian appeal • Moderate premium quality appeal vs. other commodities in this market	• Moderate Australian appeal • Moderate premium quality appeal vs. other commodities in this market	• High likelihood to buy imported blackberries from Australian • Moderate premium quality appeal vs. other commodities in this market

Blackberries have a lower penetration vs. other commodities, however, 1 in 3 people consume them weekly in the UAE

Blackberries

Attractiveness



1 An adjustment factor has been applied to results in India, Indonesia, Vietnam, UAE and Qatar to account for overclaim in these markets – see appendix for further detail
Source: Kantar HIA International Demand Study 2022

Strategic priority   Low hanging fruit   Long term play   Low priority

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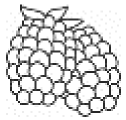
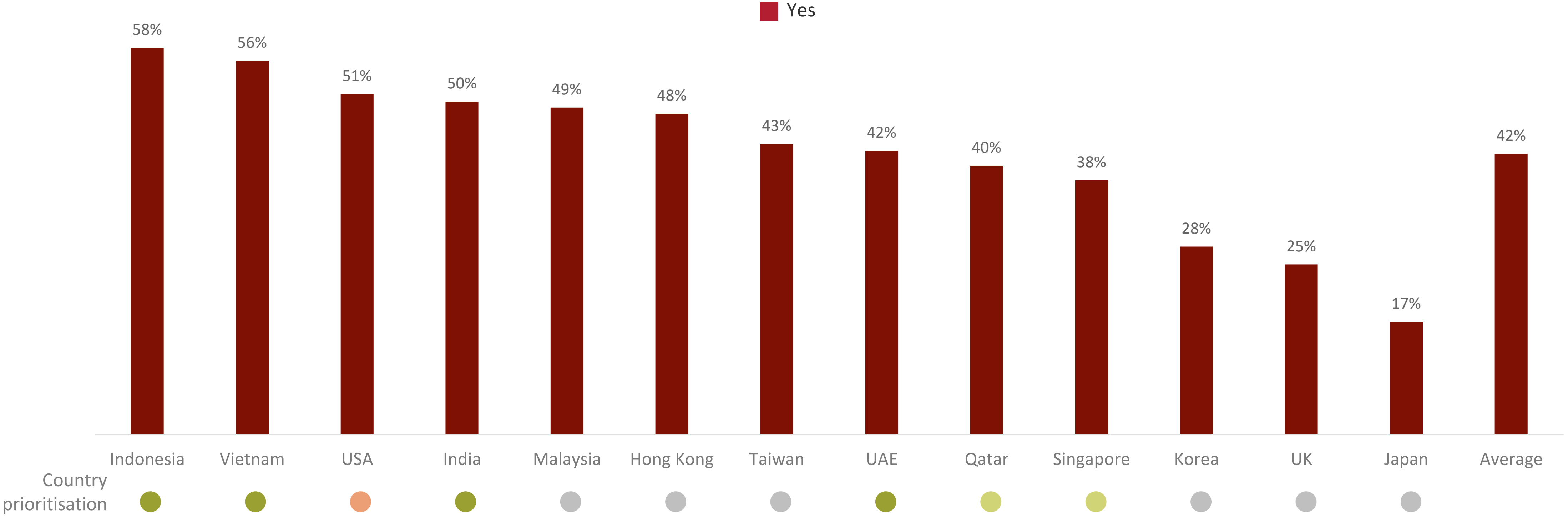
Hort Innovation

Across most markets blackberries have the potential to command a premium price



Blackberries

Attractiveness



1 Consumers asked if they would be willing to pay 50% more than they currently pay in their market (no price specified)
2 An adjustment factor has been applied to results in India, Indonesia, Vietnam, UAE and Qatar to account for overclaim in these markets – see appendix for further detail
Source: Kantar HIA International Demand Study 2022

Strategic priority | Low hanging fruit | Long term play | Low priority

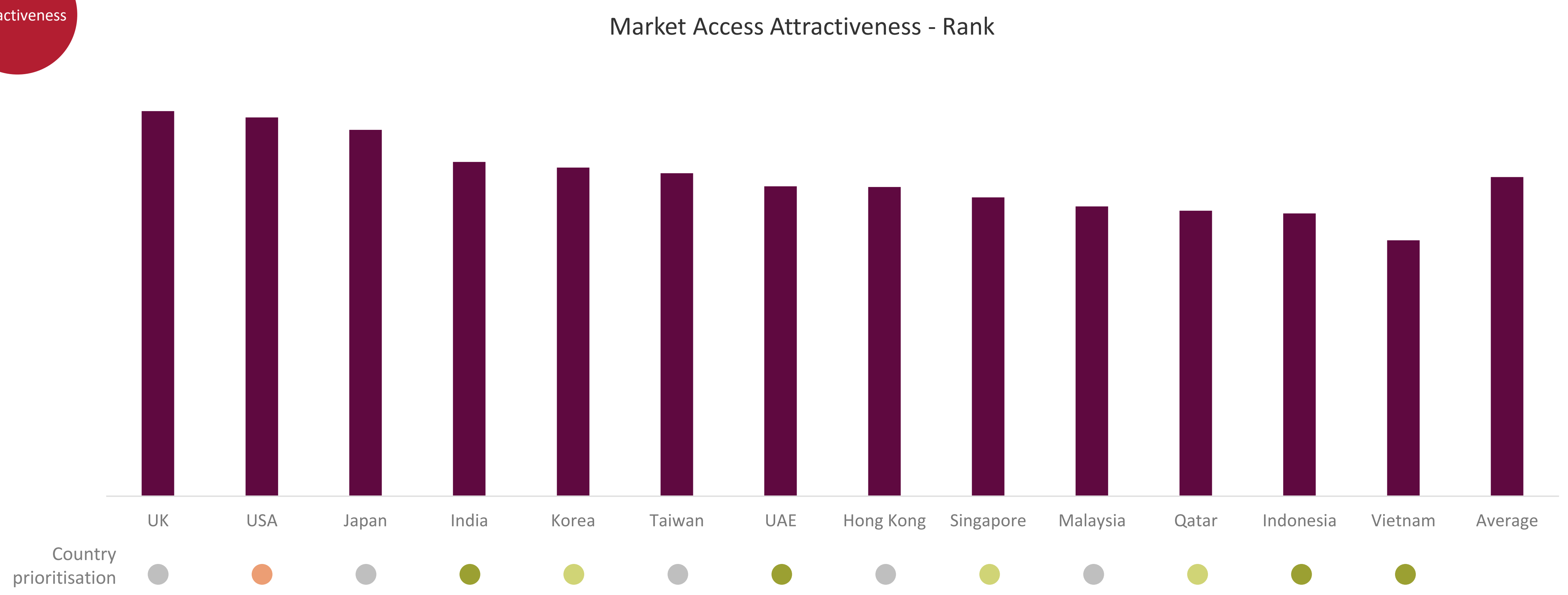
KANTAR

Hort Innovation

Although all markets are attractive, more affluent markets with larger populations rank m highly

Blackberries

Attractiveness



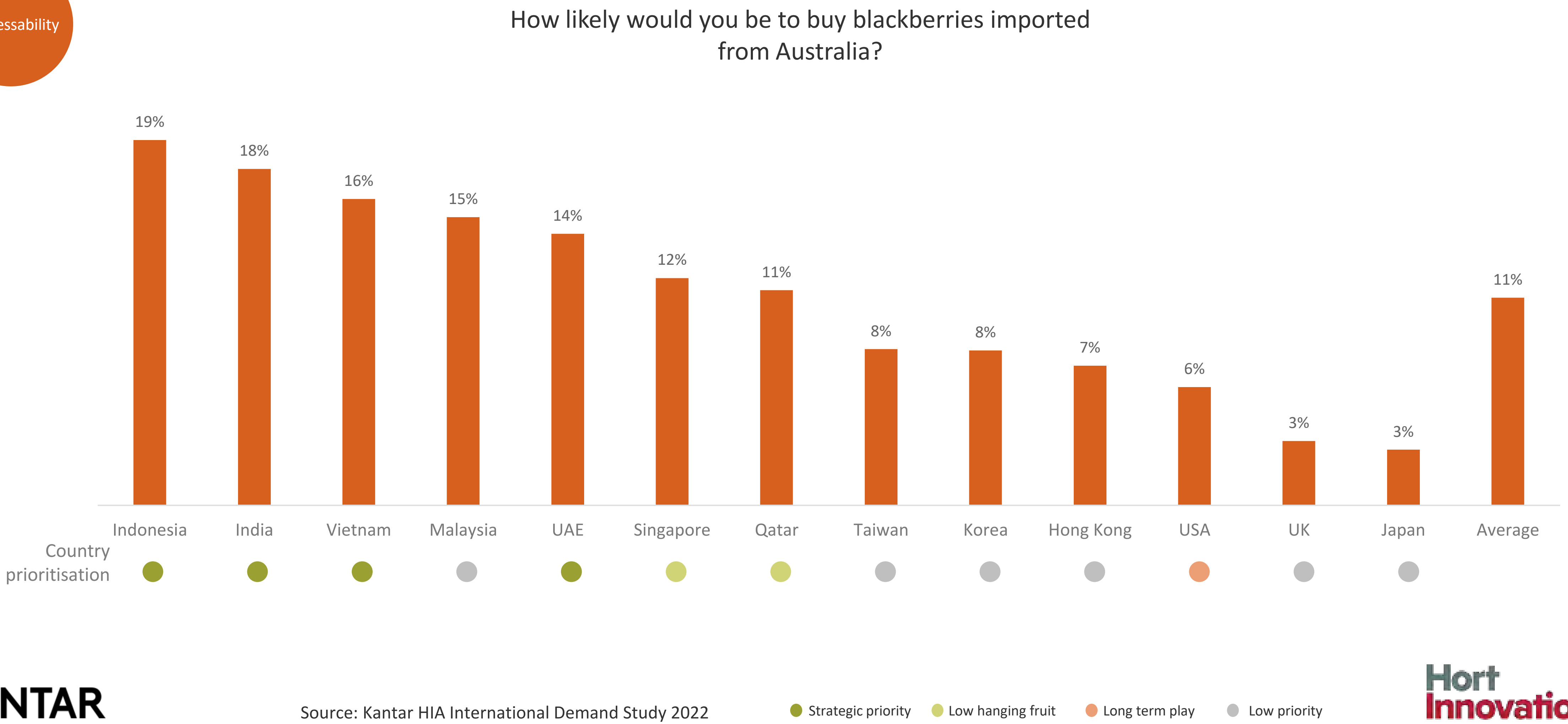
Source: Deloitte Access Economics 2021

Strategic priority
Low hanging fruit
Long term play
Low priority

Blackberries have moderate Australian appeal particularly in Indonesia, India & Vietnam

Blackberries

Addressability



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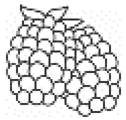
Source: Kantar HIA International Demand Study 2022

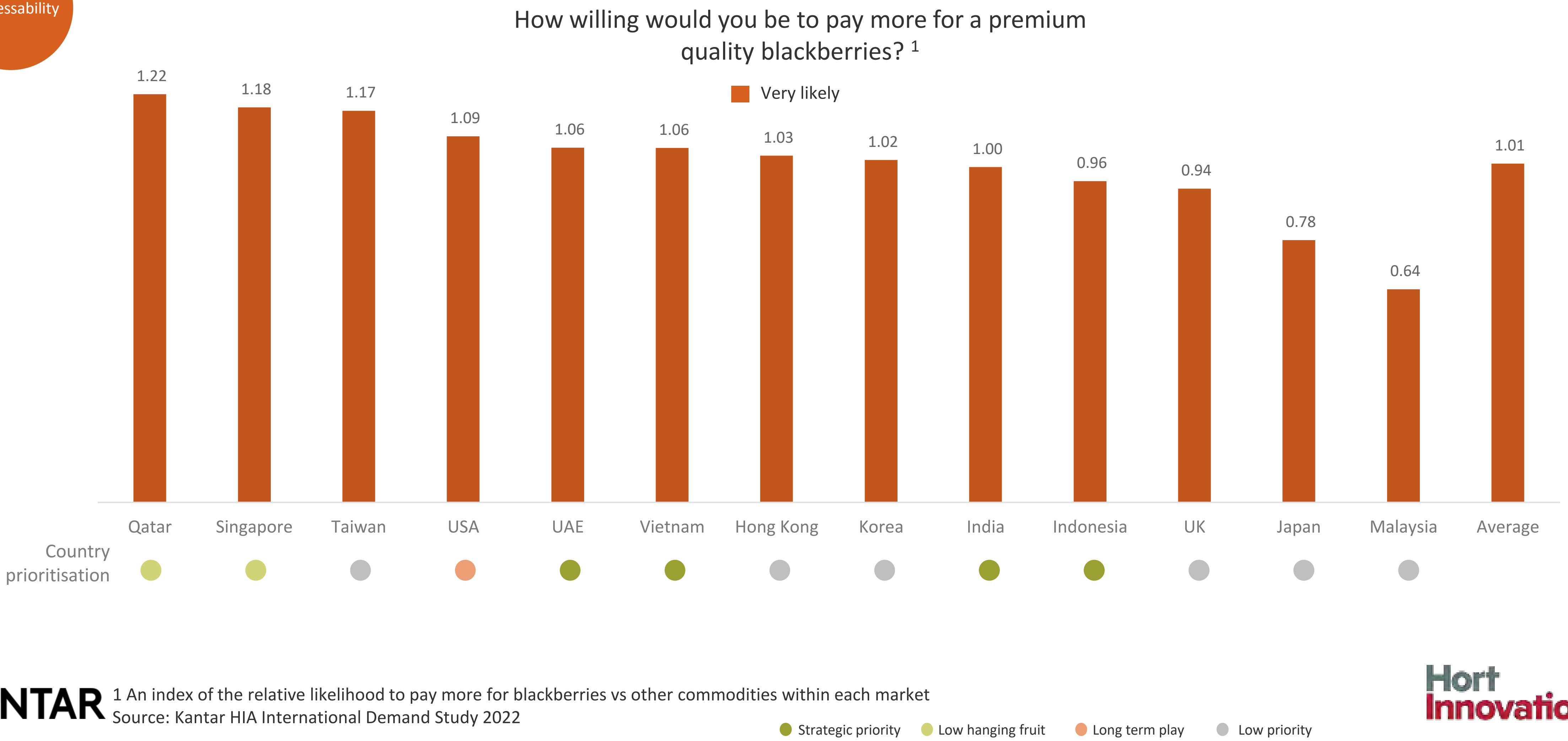
Hort Innovation

Relative desire for premium vs. other commodities is high in most markets, especially Qatar, Singapore and Taiwan



Blackberries

Addressability

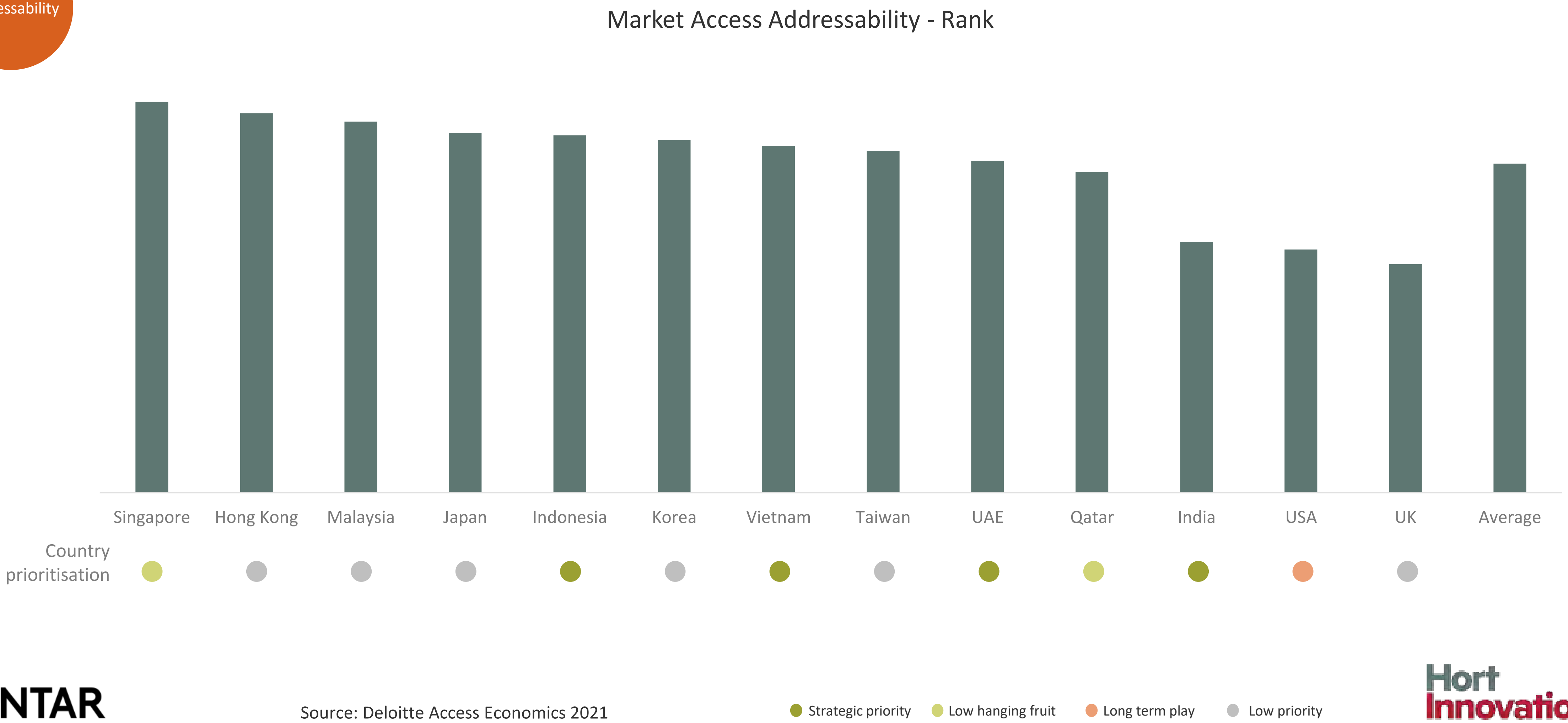


1 An index of the relative likelihood to pay more for blackberries vs other commodities within each market
Source: Kantar HIA International Demand Study 2022

Some markets rank as more addressable due to the ease of trade, market risk and value chain competitiveness

Blackberries

Addressability



Source: Deloitte Access Economics 2021

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3.2
Blackberries

i. Market prioritisation
Leverage the strategic framework to prioritize markets based on consumer behaviour, perception and market access

ii. Commodity profiling

In-depth data profiling of how the commodity is consumed across markets, premium triggers and barriers

Hort Innovation

The prioritisation revealed x4 markets ripe for Blackberries export.
The next section will deep dive into Blackberries consumption across markets

Blackberries

Market	Market priorities
USA	Long term play
UK	Low priority
Singapore	Low hanging fruit
India	Strategic priority
Japan	Low priority
Hong Kong	Low priority
South Korea	Low priority
Malaysia	Low priority
UAE	Strategic priority
Qatar	Low hanging fruit
Taiwan	Low priority
Vietnam	Strategic priority
Indonesia	Strategic priority

Strategic priority · Low hanging fruit · Long term play · Low priority

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Hort Innovation

Blackberries consumption snapshot

Blackberries

	India	Vietnam	Indonesia	UAE
HOW OFTEN (P1W pen.)	28%	24%	26%	36%
WHEN	Snack Breakfast	Lunch Dinner Snack	Snack Dessert	Snack Breakfast
HOW	Fresh on its own	Fresh on its own or As part of a snack	In a Smoothie / Frappe / Juice or In a Salad	Fresh on its own
WHY	Tasty Connection	Tasty Indulgence	Tasty Health & Nutrition	Tasty Quick & Easy
WHERE	At home	At home	At home	At home
WHO WITH	With Family	With Family	With Family	With Family

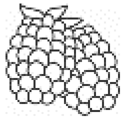
Source: Kantar HIA International Demand Study 2022

Blackberries: Strategic Imperatives

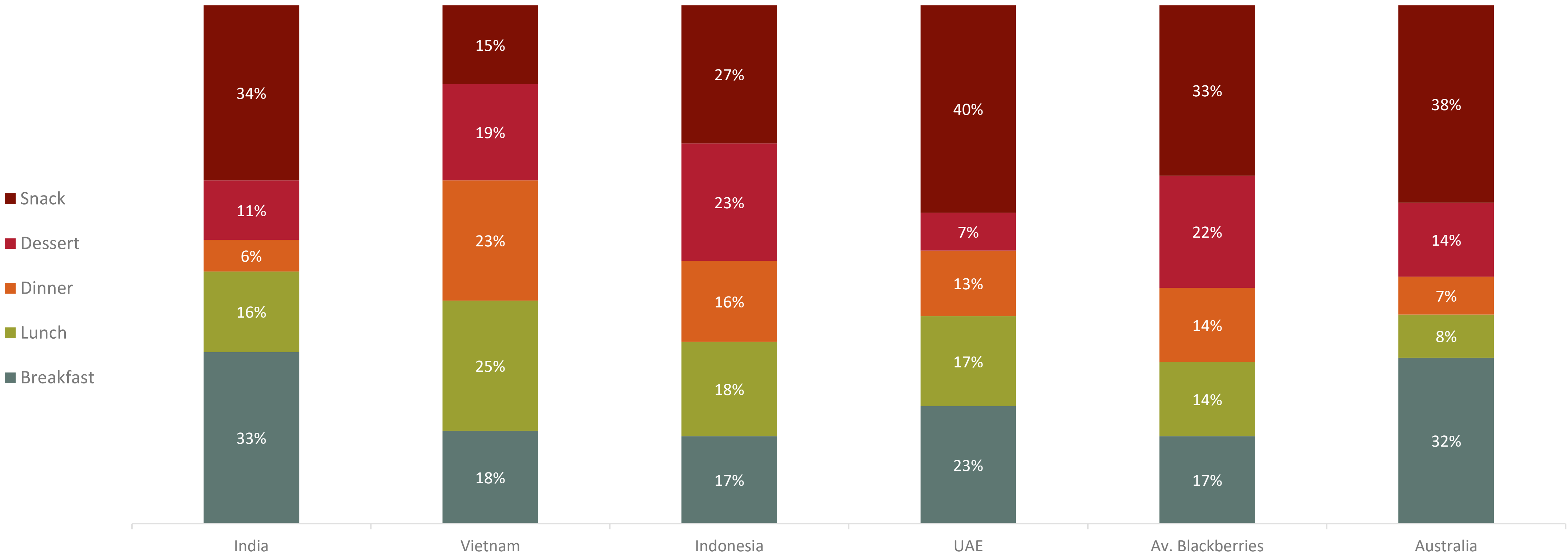
Blackberries

	India	Vietnam	Indonesia	UAE
CONSUMER PREFERENCES	As a tasty and refreshing snack or breakfast, fresh on its own, to connect with family at home	As a tasty and indulgent snack, lunch or dinner, fresh on its own or as part of a snack, at home with family	As a tasty & healthy snack or dessert in a smoothie/frappe/juice or in a salad, at home with family	As a tasty, quick & easy snack or breakfast, fresh on its own, at home with family
NEEDS TO SATISFY	Tasty Connection	Tasty Indulgence	Tasty Health & Nutrition	Tasty Quick & Easy
FUNCTIONAL ATTRIBUTES	Refreshing Taste Fresh and Light	Refreshing Taste Fresh and Light Rich in Anti-oxidants	Refreshing Taste Rich in Anti-oxidants	Refreshing Taste Sweet
PREMIUM OPPORTUNITY	Fresher Free from Pesticides I trust its safety	Fresher Right State of Ripeness More Flavour	Free from Pesticides Higher in vitamins and minerals	Fresher Free from Pesticides
BARRIERS TO OVERCOME	Too expensive	Bruises Easily	Too expensive	Too expensive
KEY SUBSTITUTES	Apples Bananas	Apples Blueberries	Bananas Mangoes	Strawberries Bananas

Blackberries are primarily consumed as a snack across priorities with the exception of Vietnam where they are consumed with lunch or dinner. Breakfast is also important in India


Blackberries

When did you consume?



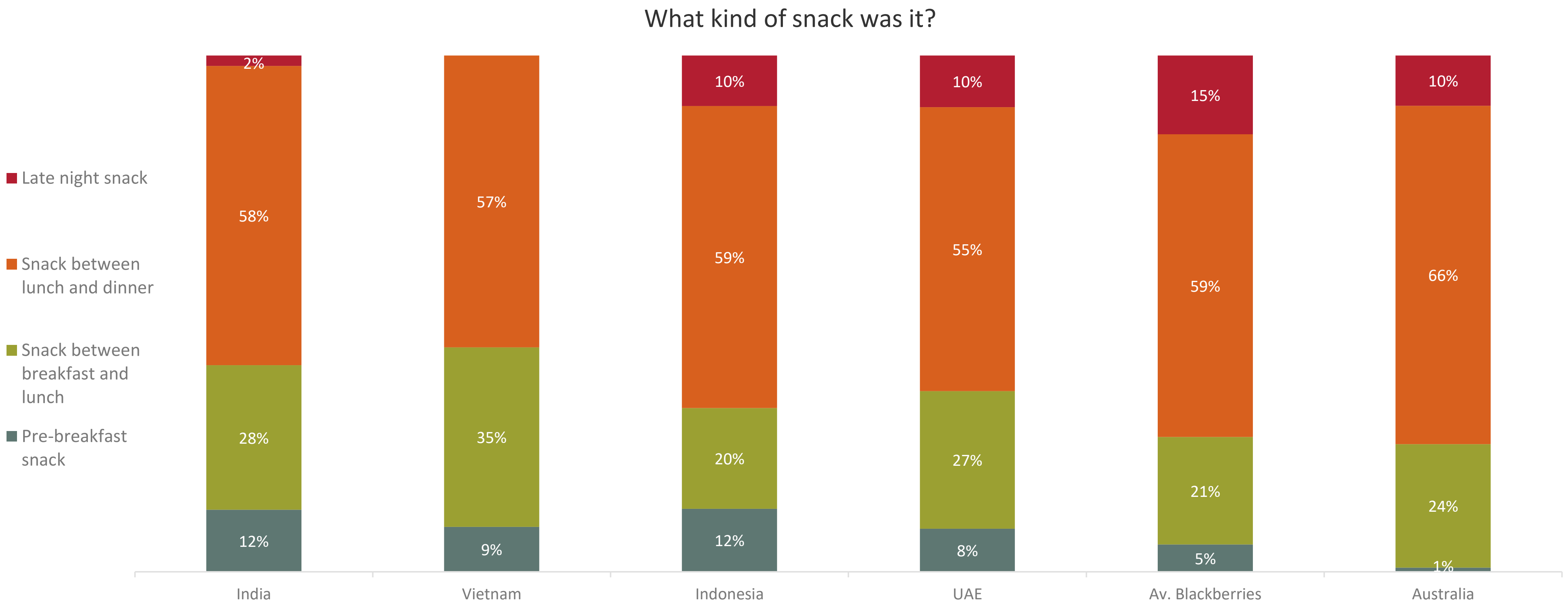
Note: Australian data for "Berries" overall
Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	150	150	148	148	161	150	150	111	148	151	154	150	20*

*Caution: Low Base

When consumed as a snack they are typically consumed between lunch and dinner

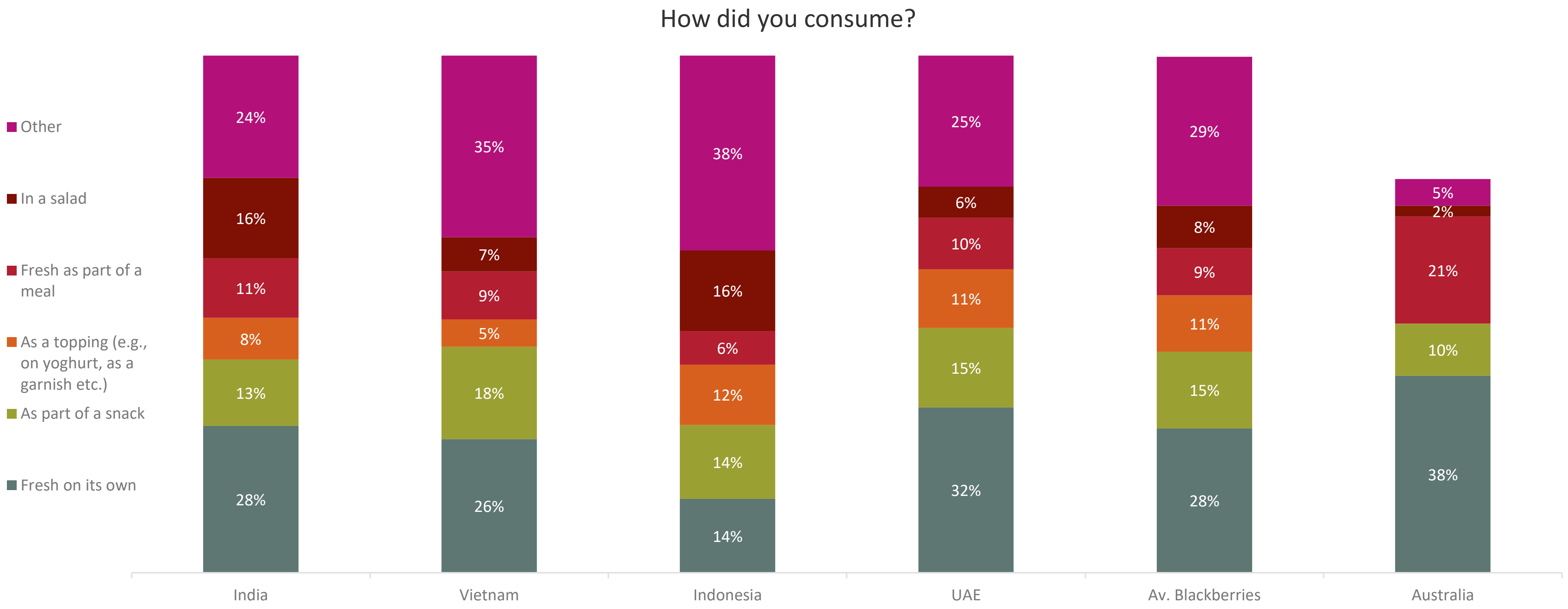
Blackberries



Note: Australian data for "Berries" overall
Source: Kantar HIA International Demand Study 2023

Blackberries are most commonly consumed fresh on their own or as part of a snack

Blackberries



Note: Australian data for "Berries" overall

'Other' = In a smoothie / frappe / juice, As an ingredient in baking, Cooked on its own, As an ingredient in cooking, For decoration / show only, As part of an alcoholic drink e.g. cocktail and To make baby food / puree and Don't Know

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	150	150	148	148	161	150	150	111	148	151	154	150	20*

*Caution: Low Base

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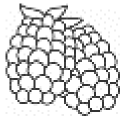
Hort Innovation

Most people consume Blackberries at home

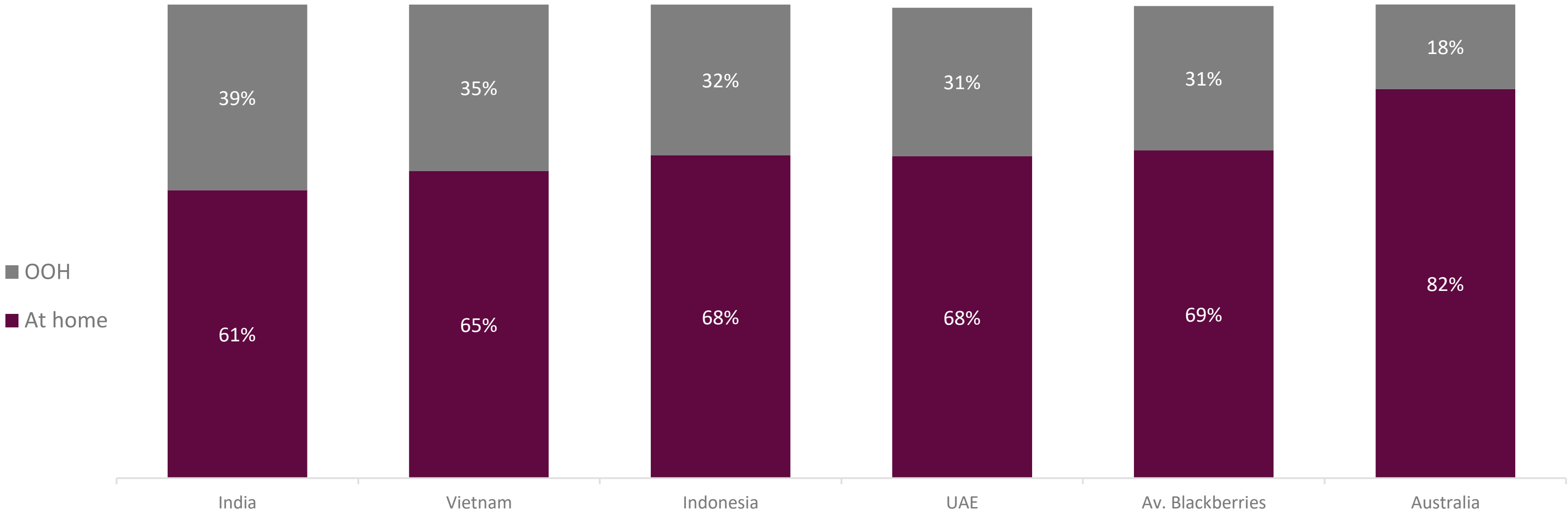


Blackberries

Where were you?

69%

Of consumption of blackberries is in the home, this varies only slightly by market



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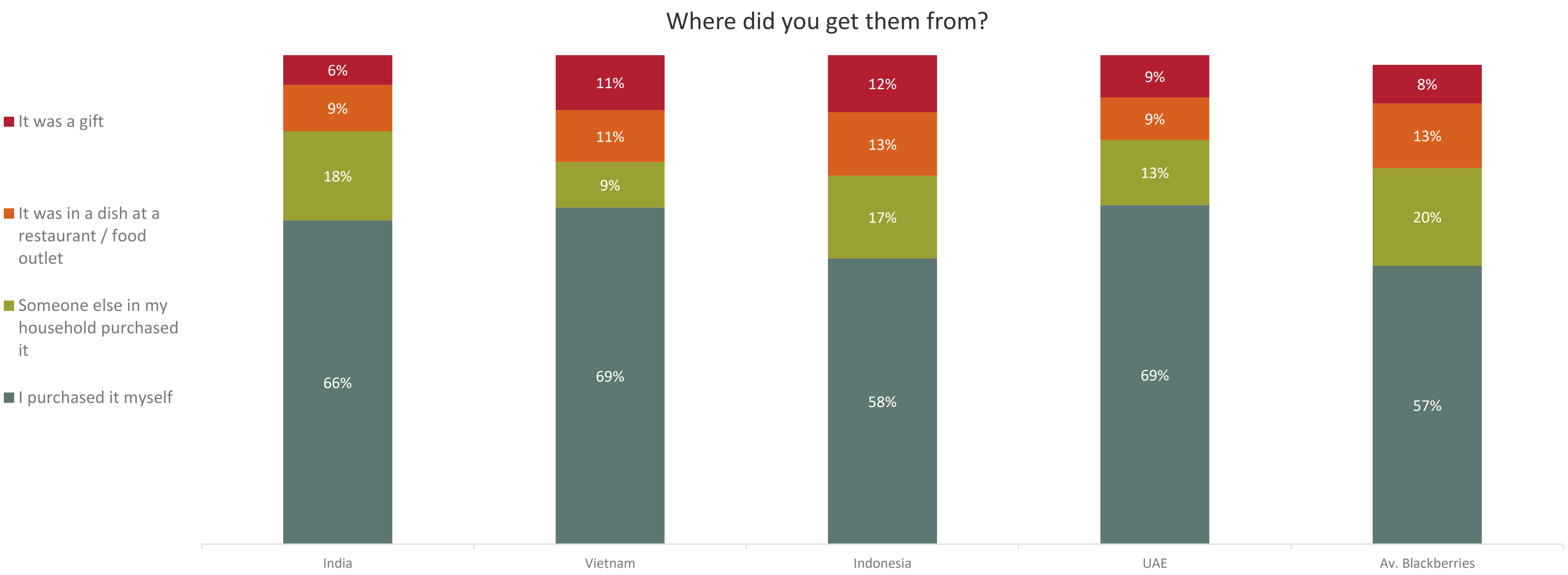
*Caution: Low Base

KANTAR

Hort Innovation

Most people purchase Blackberries themselves

Blackberries



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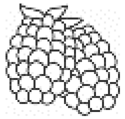
	150	150	148	148	161	150	150	111	148	151	154	150	20*

*Caution: Low Base

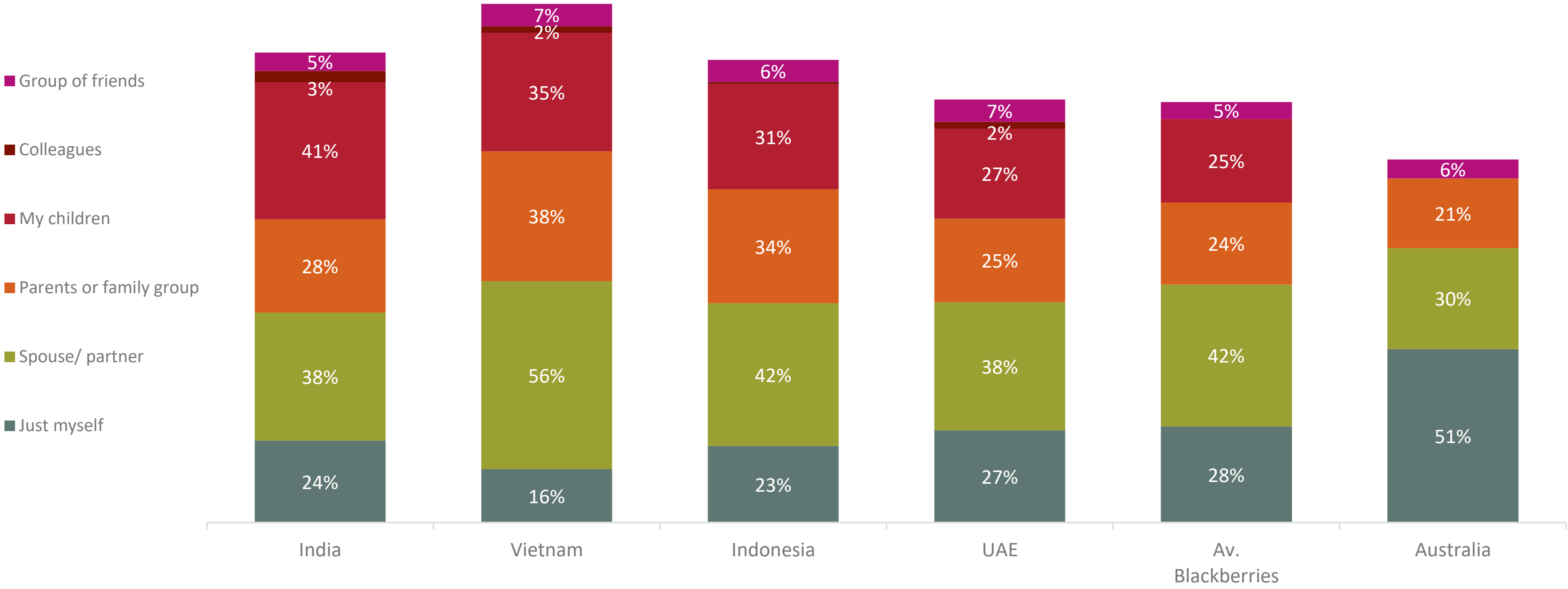
Blackberries are consumed with a spouse or partner or as part of a larger family group



Who were you with?

42%

Of consumption of blackberries (on average) is with a spouse/partner.



Note: Australian data for "Berries" overall
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N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	150	150	148	148	161	150	150	111	148	151	154	150	20*

*Caution: Low Base

KANTAR

Hort Innovation

There is a range of reasons why people choose to eat different fruits & vegetables. There are
6 universal consumer needs pillars that drive this choice for consumers globally

The 6 needs pillars are universal across commodities and global markets

Tasty	Quick & Easy	Healthy & Nutritious	Indulgence	Physical & Mental Energy	Connection
All about: Taste, Refreshment, and Enjoyment	*All about:* Convenience Simplicity, and Ease	*All about:* Guilt-free, Nourishing and Sensible	*All about:* Comfort, Relaxation and Self Care	*All about:* Energy, Uplift, and Reinvigoration	*All about:* Bonding, Celebration and Creating Memories

KANTAR

Hort Innovation

In priority markets, the most important reasons why people choose to consume Blackberries are for something tasty, quick & easy and for a connection

57%

of people in priority markets consume Blackberries for something

Tasty

47%

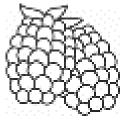
of people in priority markets consume Blackberries for

Connection

43%

of people in priority markets consume Blackberries for something

Quick & Easy



Blackberries

Taste is the most important consumption driver across all markets, followed by quick and easy in India and UAE, indulgence in Vietnam and health & nutrition in Indonesia

Which were important when choosing to consume?

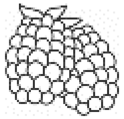
	India	Vietnam	Indonesia	UAE	Av	Aus
Tasty	62%	52%	57%	61%	54%	71%
Quick & Easy	49%	30%	40%	43%	41%	63%
Healthy & Nutritious	39%	37%	49%	37%	36%	42%
Indulgence	39%	48%	42%	41%	34%	26%
Physical & Mental Energy	29%	31%	28%	28%	25%	27%
Connection	49%	44%	46%	37%	33%	17%

Note: Australian data for "Berries" overall

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	150	150	148	148	161	150	150	111	148	151	154	150	20*

*Caution: Low Base



When we investigate in more detail, Blackberries are consumed because they are 'really tasty' and 'refreshing' and Vietnam because they are popular

Which were important when choosing to consume?

	India	Vietnam	Indonesia	UAE	Av	Aus
Really tasty	35%	26%	31%	33%	30%	53%
Refreshing	36%	18%	33%	33%	25%	33%
Quick and easy	24%	15%	22%	24%	23%	42%
Has the nutrition my mind / body needs	19%	15%	25%	17%	18%	24%
Good for sharing	20%	20%	18%	16%	15%	6%
Everyone would eat	16%	23%	12%	15%	14%	14%
To satisfy a craving	18%	17%	14%	13%	13%	11%
That helped me relax / unwind	12%	17%	19%	11%	12%	5%
To meet certain macro / nutritional goals	9%	13%	14%	11%	11%	9%
To help manage my weight	11%	14%	16%	13%	11%	13%

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Note: Australian data for "Berries" overall
Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	150	150	148	148	161	150	150	111	148	151	154	150	20*

*Caution: Low Base

Hort Innovation

More functionally, consumers are looking for Blackberries that are rich in anti-oxidants while still being light and refreshing

30%

of people in priority markets are looking for Blackberries that are

Refreshing taste

21%

of people in priority markets are looking for Blackberries that are

Rich in Anti-oxidants

20%

of people in priority markets are looking for Blackberries that are

Fresh / Light

Consumers are looking for Blackberries that have a refreshing taste across priority markets

Blackberries

What were you looking for when you consumed?

	India	Vietnam	Indonesia	UAE	Av
Refreshing taste	31%	28%	30%	29%	27%
Sweet	18%	14%	21%	24%	23%
Fresh / Light	27%	17%	25%	15%	22%
Rich in anti-oxidants	23%	17%	25%	16%	19%
Good source of minerals & vitamins / Nutritionally dense	16%	11%	18%	19%	14%
Quick / easy to prepare	9%	11%	12%	9%	13%
Low in calories	13%	10%	16%	10%	12%
Contains fibre	14%	9%	19%	11%	12%
To aid digestion	9%	17%	14%	18%	11%
Fun / exciting	18%	15%	12%	12%	10%

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	150	150	148	148	161	150	150	111	148	151	154	150	20*

*Caution: Low Base

Premium Narrative Slide

When it comes to the premium opportunity, consumers are looking for Blackberries that are fresher, free of pesticides, are higher in vitamin & mineral content, and are safe & trusted

Source: <sources here; divided by a semi-colon; all on one line>

37%

of people in priority markets are looking for premium Blackberries that are

Fresher

29%

of people in priority markets are looking for premium Blackberries that are

Free from pesticides

27%

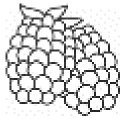
of people in priority markets are looking for premium Blackberries that are

Higher in vitamins and minerals

25%

of people in priority markets are looking for premium Blackberries that are

Safe & Trusted



Blackberries

Premium quality Blackberries are defined by being fresher and in India and Indonesia free from pesticides and safe

What does premium quality mean to you?

	India	Vietnam	Indonesia	UAE	Av
Fresher	37%	33%	32%	44%	35%
Sweeter	23%	19%	24%	19%	22%
Organic / free from pesticides	30%	23%	36%	27%	22%
Higher in vitamins and minerals	26%	25%	33%	22%	22%
More flavour	24%	27%	19%	19%	21%
Right state of ripeness	20%	30%	19%	23%	21%
I trust its safety	30%	17%	27%	26%	19%
More appetizing (e.g. not bruised, damaged)	11%	24%	19%	13%	15%
Lasts longer	19%	19%	21%	13%	14%
Premium packaging	22%	15%	29%	19%	14%

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	150	150	148	148	161	150	150	111	148	151	154	150	20*

*Caution: Low Base

Price is the biggest barrier to overcome with Blackberries consumption, followed by bruising easily and exciting alternatives

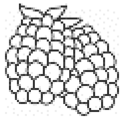
Bananas and Apples are considered worthy substitutes

Barriers to Consumption

Price	Bruise Easily	Exciting Alternatives
30% (priority market average)	19% (priority market average)	16% (priority market average)

Leading Substitutes

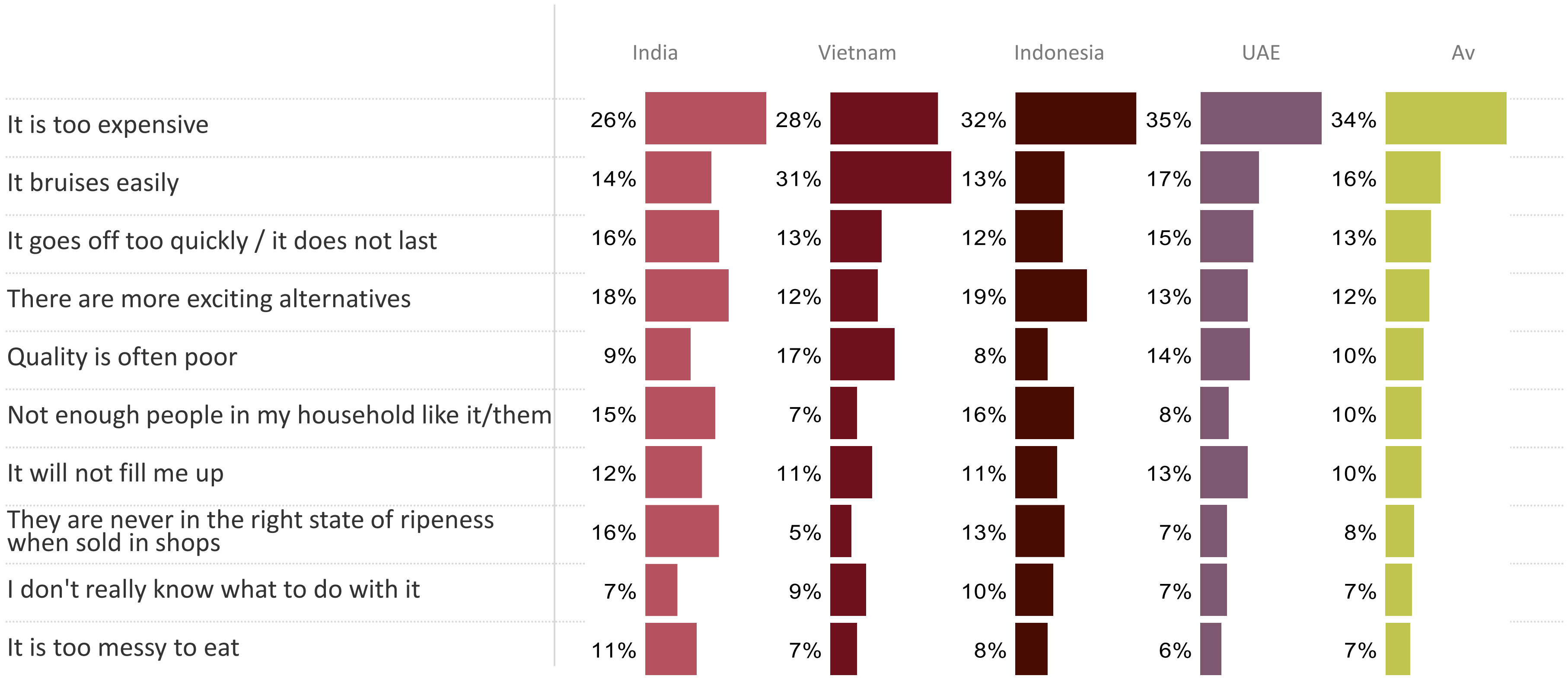
Bananas	Apple	Mango
31% (priority market average)	29% (priority market average)	25% (priority market average)



Blackberries

Price is a key barrier across markets along with more exciting alternatives and bruising in Vietnam

What are the reasons you may not choose?



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Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
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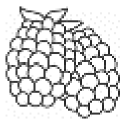
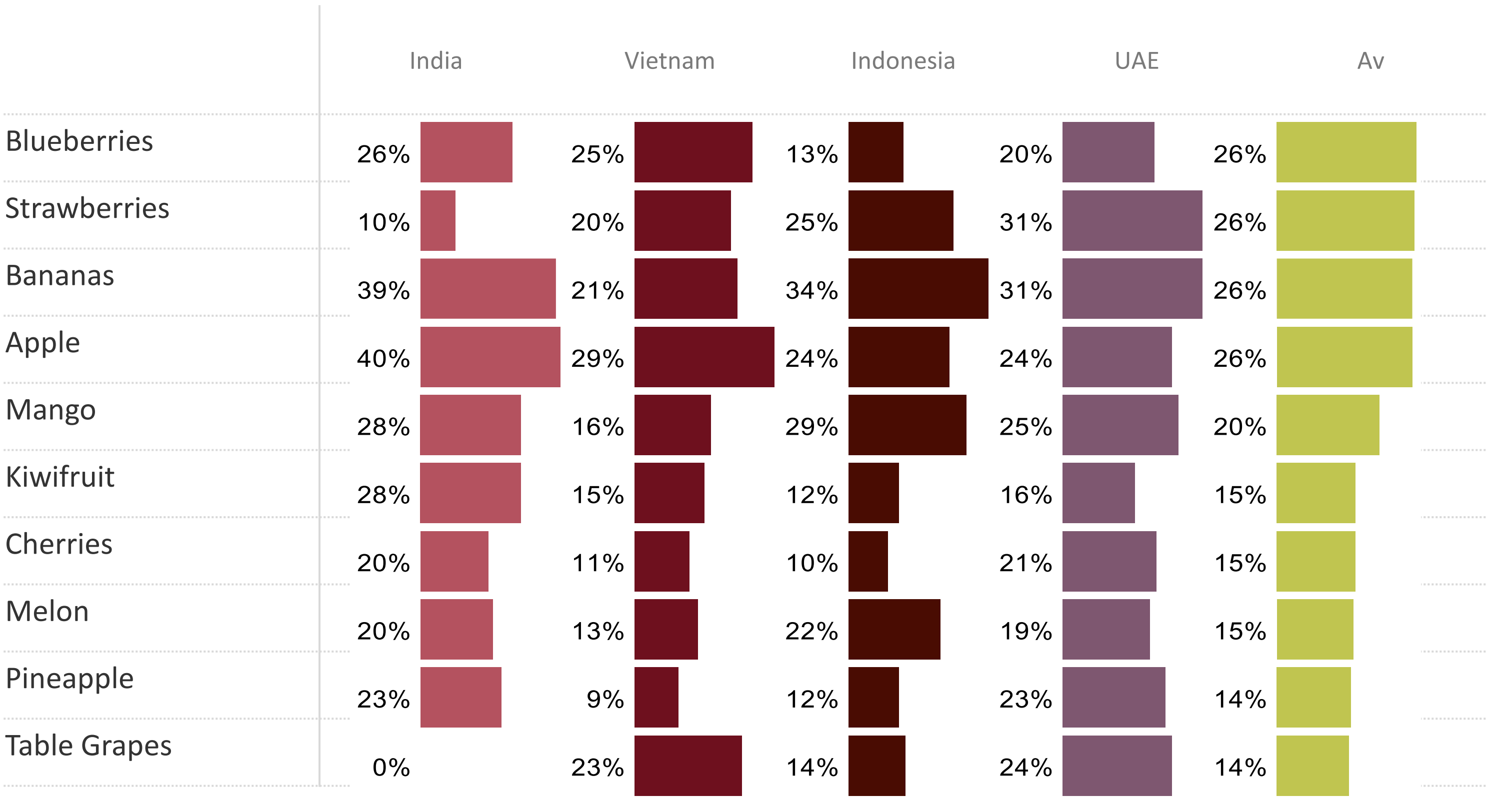
Hort Innovation



Blackberries

Apples and Bananas are key substitutes across priority markets along with Blueberries in Vietnam, Mangos in Indonesia and Strawberries in Indonesia

What else would you typically consider having instead?



KANTAR

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	150	150	148	148	161	150	150	111	148	151	154	150	20*

*Caution: Low Base

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Recommendation: How to drive growth in Australian Blackberries

Blackberries

1. Focus on Strategic Priority Markets

Focus on markets where category **penetration is high** and consumers are **willing to pay a premium** for quality Blackberries (ie. **Indonesia, UAE, Vietnam and India**). Leverage already **high appeal for Australian Blackberries across all priority markets**, to drive incremental growth in Australian Blackberry exports.

2. Deliver Core Consumer Needs

Deliver the core consumer needs across priority markets with Blackberries that are **refreshing, tasty**, and **indulgent to share**. Ensure Blackberries are at or above par for being **rich in anti-oxidants, fresh and light, that serve as a quick and easy snack or meal ingredient.**

3. Leverage Premium Advantage

Maximise the premium opportunity by delivering Blackberries that are fresher, free of pesticides, are higher in vitamins and mineral , and come from a safe and trusted source.

4. Reduce Consumption Barriers

Address perceptions that Blackberries are **too expensive, bruise easily** and **are less exciting than alternatives**, to minimise consumer drift to close substitutes like Bananas, Apples and Mangoes**.**

'Where to Play'

'How to Win'

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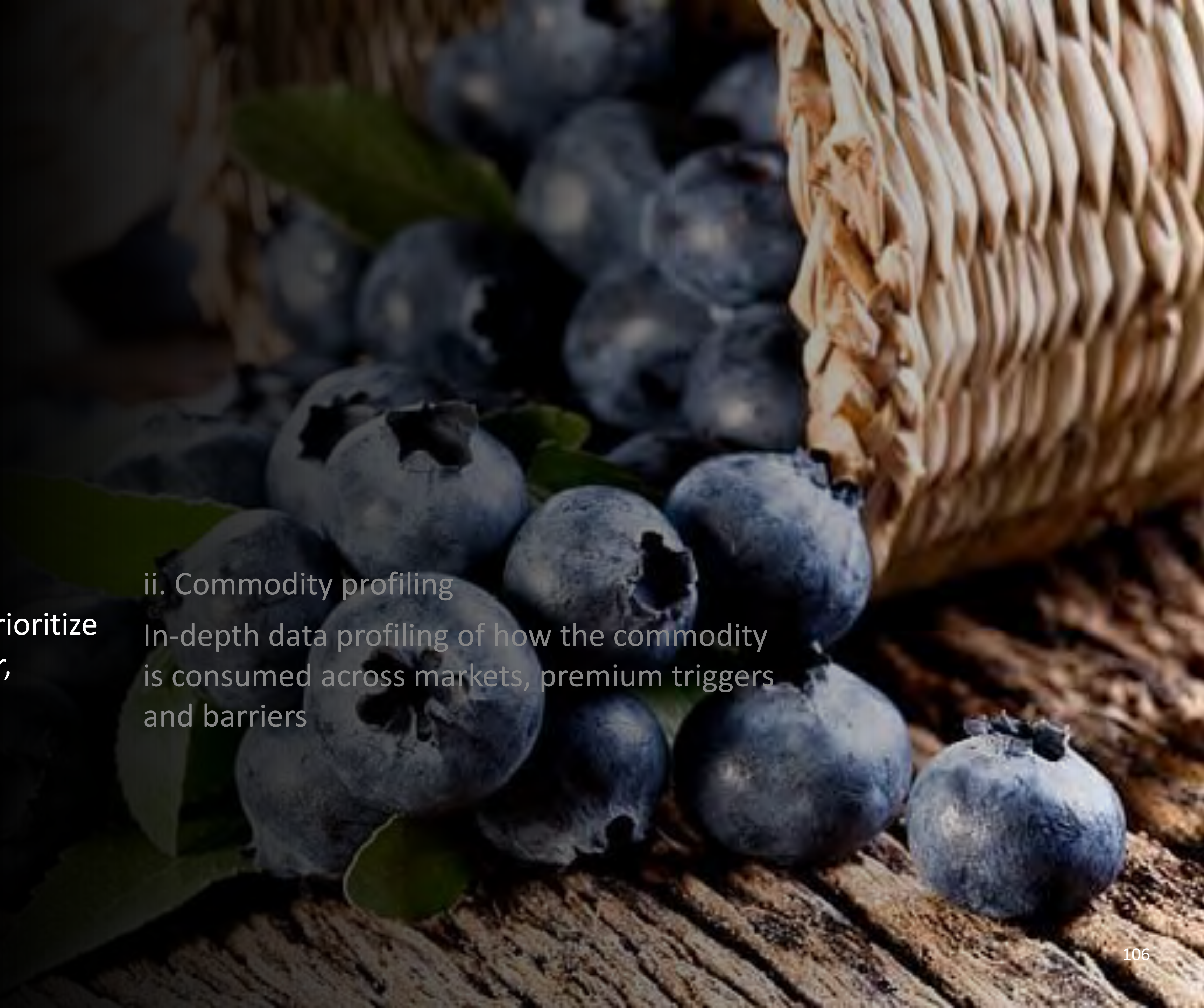
3.3
Blueberries



i. Market prioritisation
Leverage the strategic framework to prioritize markets based on consumer behaviour, perception and market access

ii. Commodity profiling
In-depth data profiling of how the commodity is consumed across markets, premium triggers and barriers

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4 key considerations when interpreting the outputs of the Market Prioritisation

1.
No Existing Technical Market Access

2.
Markets with Existing Trade

3.
Premium Opportunities

4.
Focus of Investment

1. No Existing Technical Market Access

Existing technical market access for a commodity was **intentionally NOT included** in the evaluation of addressability

Rationale:

- This project was designed to identify attractive and addressable **future** growth geographies therefore the analysis was not restricted by current arrangements
- This research is intended to **support and inform industry** decisions regarding the progress of any potential future or ongoing market access or market improvement request

2. Markets with Existing Trade

While the addressability calculation includes data on general market access and trade, it intentionally does not include whether Australia currently trades in a particular commodity

Rationale:

- The objective of this analysis is to provide an objective assessment of whether a market is attractive and addressable independent of current arrangements
    - If a market that we are currently trading with for a particularly commodity is shown NOT to be a ‘Strategic Priority’, this does NOT mean that we should consider withdrawing from this market.
    - However, we recommend re-evaluating the relative focus of investment in this market, and consider other markets when looking for **future** growth opportunities

3. Premium Opportunity

In evaluating attractive and addressable export markets, we have intentionally used data that shows where premium opportunities can be found

Rationale:

- The overall objective of this project was to identify **profitable** growth opportunities for commodities in the future, and Australian commodities will have more chance of growing profitably where they have a better chance for commanding a price premium
  - High commodity penetration in a market has also been used to evaluate attractiveness, but this analysis favours markets where there is a larger opportunity for Australian products to command a **premium**.

4. Focus of Investment

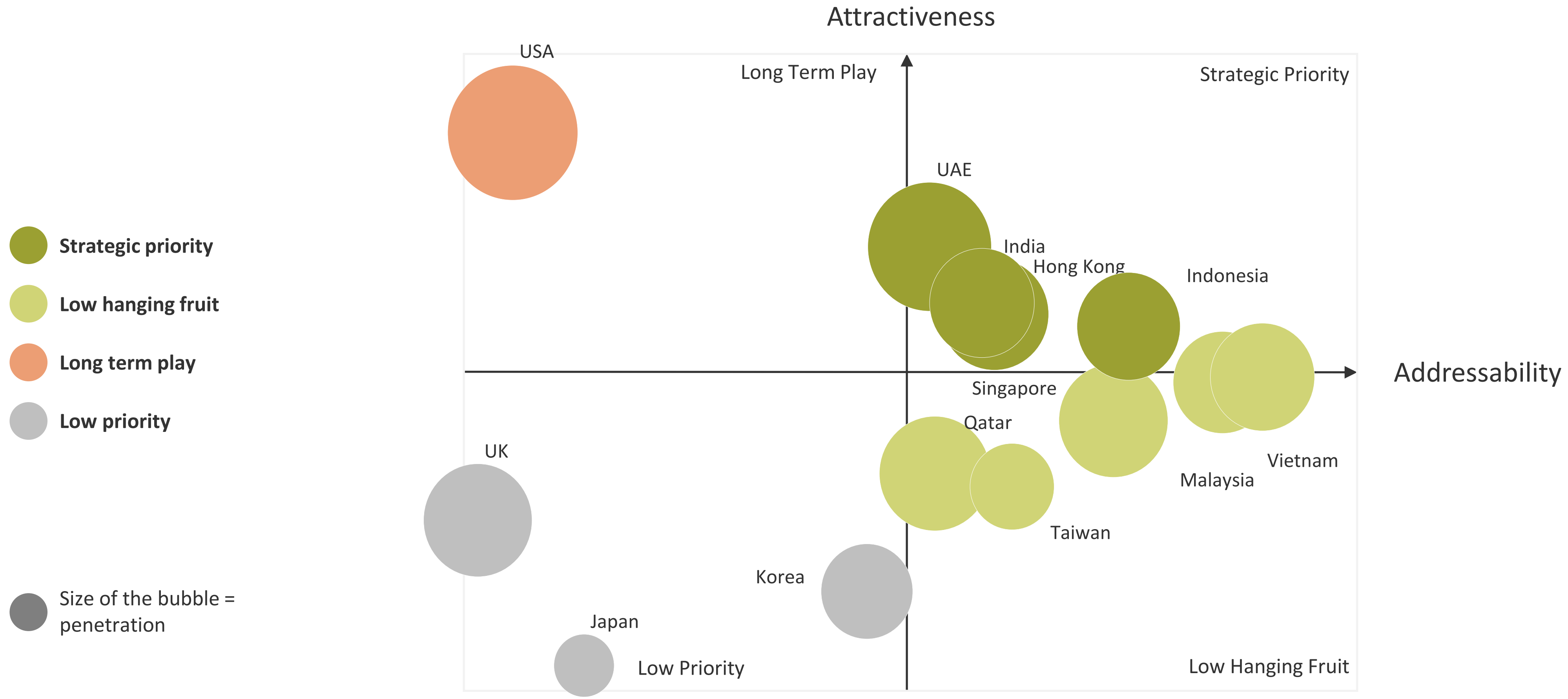
The evaluation and prioritisation of export markets into the 4 quadrants of attractiveness and addressability **is intended to be only one input into decision making** about **where to focus investment**

Rationale:

- The objective of this project was primarily to offer a consumer lens into commodity consumption, to enable export decisions to be informed by more robust consumer data (while still included additional market factor data from previous Deloitte analysis)
    - Export decisions should be made using all available information including the economics of local growers and exporters and this report forms one input into that decision process

We have identified 4 strategic priority markets that represent the most attractive and appealing export opportunity for Australian blueberries, based on consumer preference and behaviour

Blueberries



Source: Kantar HIA International Demand Study 2022, World Bank 2021

Blueberries: Summary of Strategic Priorities

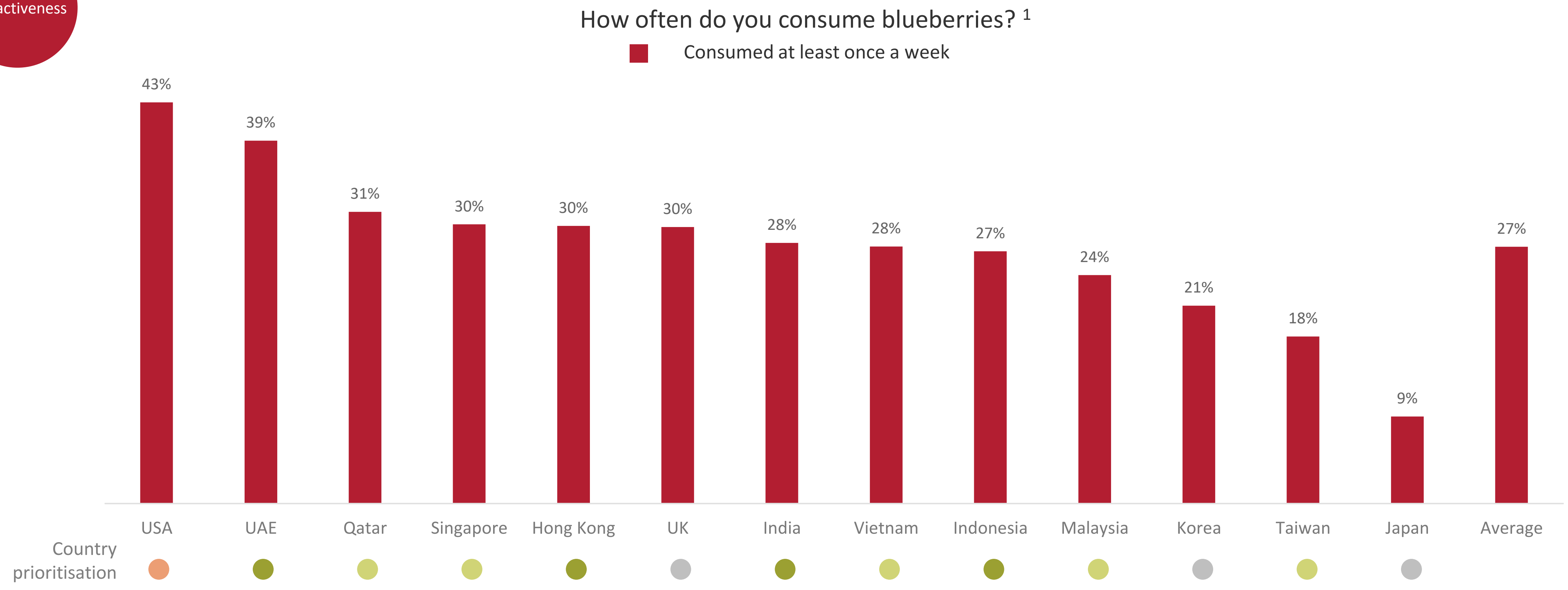
Blueberries

	Indonesia	Hong Kong	India	UAE
STRATEGIC IMPLICATIONS	There's moderate penetration of blueberries in Indonesia, but with high Australian appeal and relatively high premium appeal, it's a potential opportunity for export	Hong Kong also has moderate blueberry penetration. However, the market is ranked #2 on accessibility which, combined with relatively strong attractiveness, makes it an appealing export opportunity	India's sizeable population boosts its export potential, despite moderate penetration and premium appeal. Australian appeal for blueberries remains high	The UAE has very high blueberry penetration, second only to the US. The wide consumption of this fruit means its an attractive opportunity despite moderate premium and Australian appeal
ATTRACTIVENESS	• Moderate blueberry penetration • High claimed willingness to spend 1.5x on premium quality	• Moderate blueberry penetration (30% consume weekly) • Moderate claimed willingness to spend 1.5x on premium quality	• Moderate blueberry penetration • Moderate claimed willingness to spend 1.5x on premium quality	• Very high blueberry penetration (ranked #2 after only the USA, 40% consume weekly) • Moderate claimed willingness to spend 1.5x on premium quality
ADDRESSABILITY	• High Australian appeal • Moderate willingness to pay more for premium for blueberries vs. other commodities	• Moderate Australian appeal • Moderate willingness to pay more for premium for blueberries vs. other commodities	• High Australian appeal • Moderate willingness to pay more for premium for blueberries vs. other commodities	• Moderate Australian appeal • Moderate willingness to pay more for premium for blueberries vs. other commodities

Blueberry penetration varies by market. They're widely consumed in the US and the Middle East, but less so in Vietnam, Indonesia & Malaysia

Blueberries

Attractiveness



1 An adjustment factor has been applied to results in India, Indonesia, Vietnam, UAE and Qatar to account for overclaim in these markets – see appendix for further detail

Source: Kantar HIA International Demand Study 2022

Strategic priority Low hanging fruit Long term play Low priority

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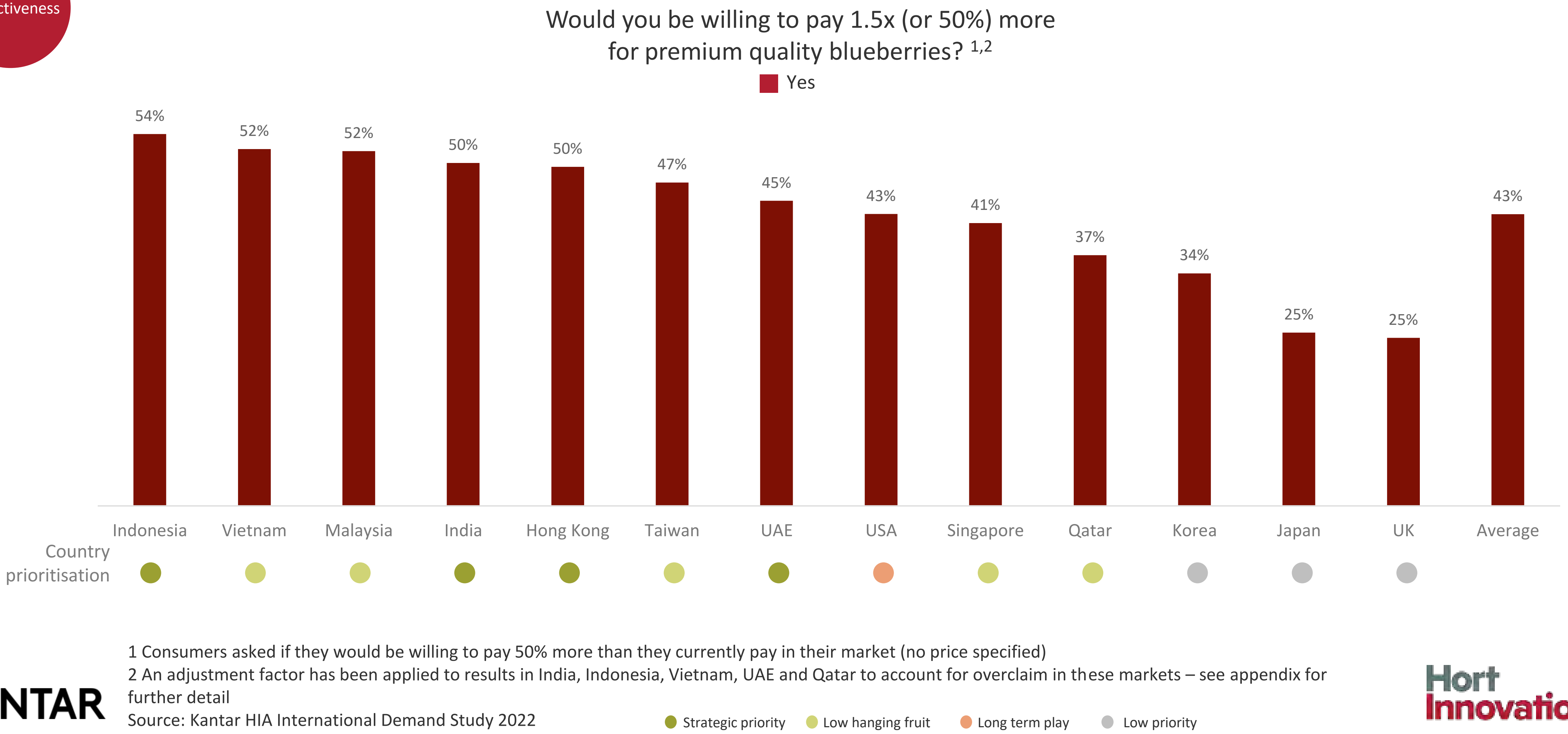
Across most markets blueberries have the potential to command a premium price

Blueberries

Attractiveness



1 Consumers asked if they would be willing to pay 50% more than they currently pay in their market (no price specified)
2 An adjustment factor has been applied to results in India, Indonesia, Vietnam, UAE and Qatar to account for overclaim in these markets – see appendix for further detail
Source: Kantar HIA International Demand Study 2022

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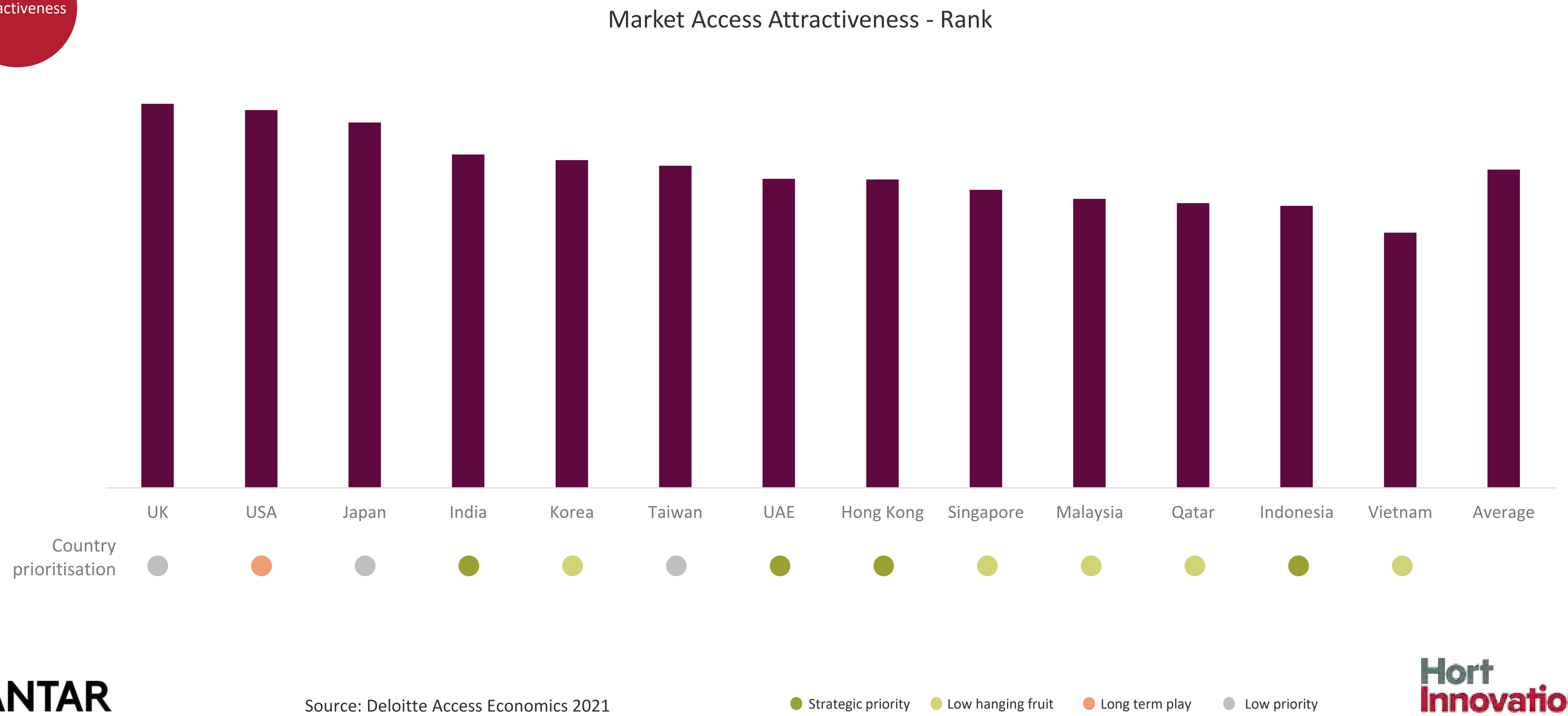
Although all markets are attractive, more affluent markets with larger populations rank more highly

Blueberries

Attractiveness

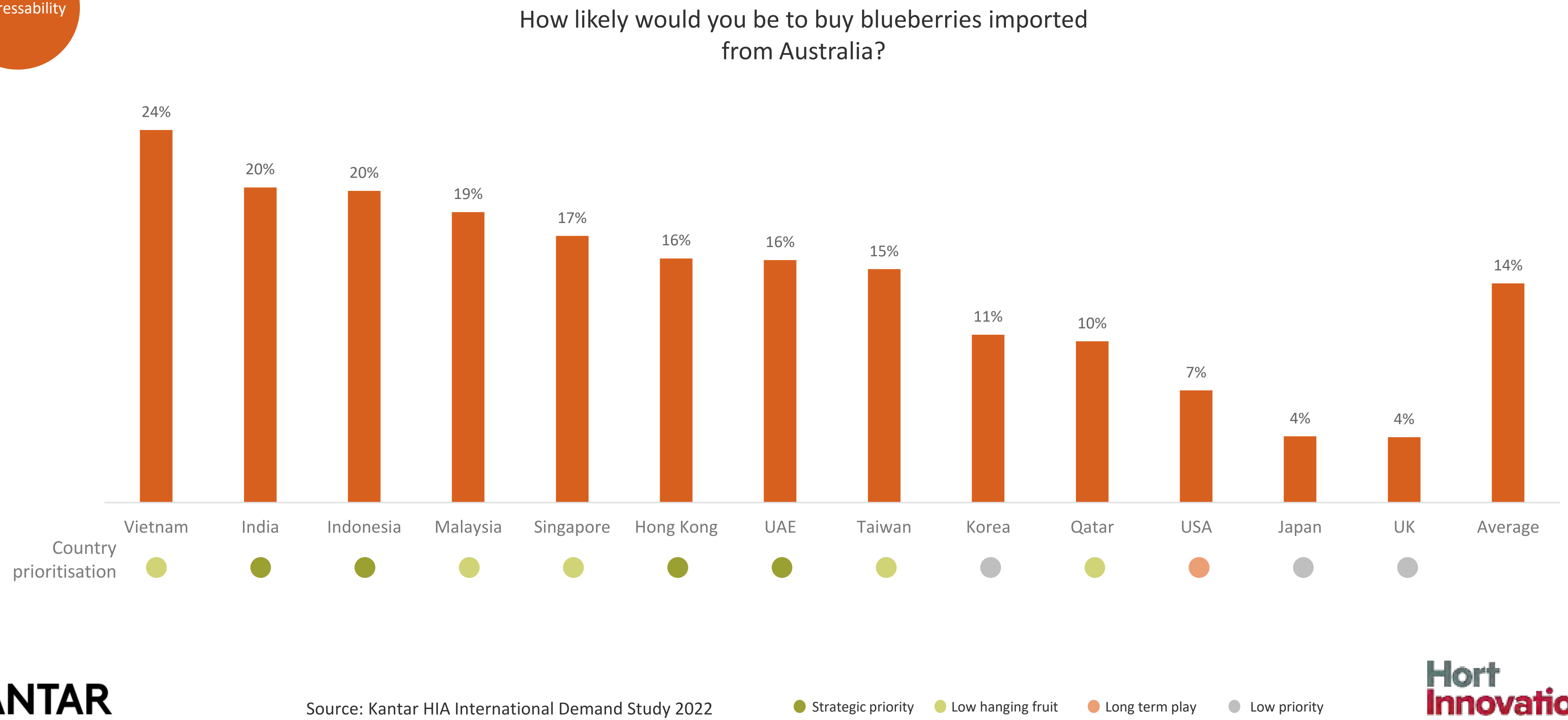


Source: Deloitte Access Economics 2021

Blueberries have moderate Australian, although countries where penetration is low show higher Australian appeal: Vietnam, India & Indonesia

Blueberries

Addressability



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Source: Kantar HIA International Demand Study 2022

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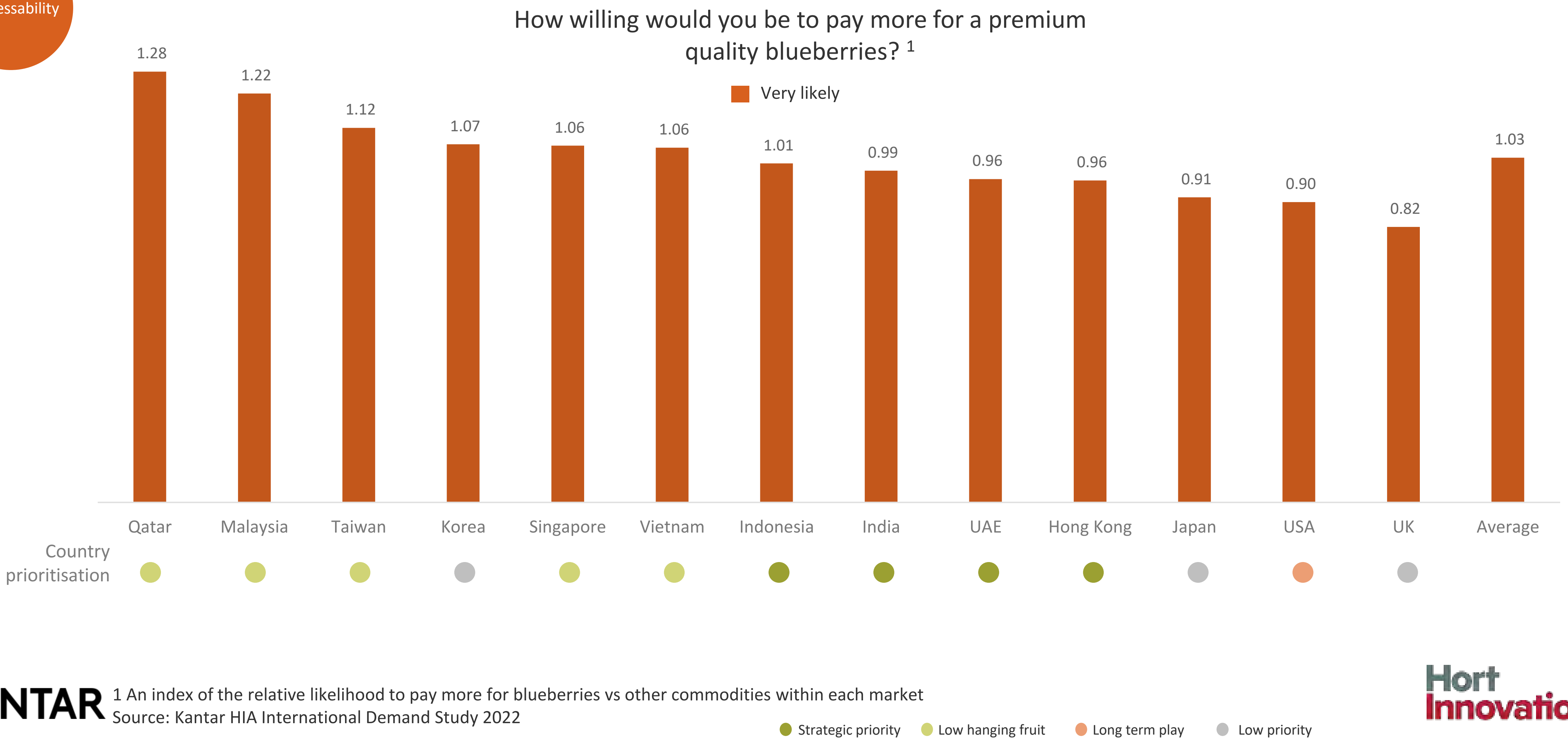
Relative desire for premium Blueberries vs. other commodities is strongest in Qatar, Malaysia and Taiwan

Blueberries

Addressability



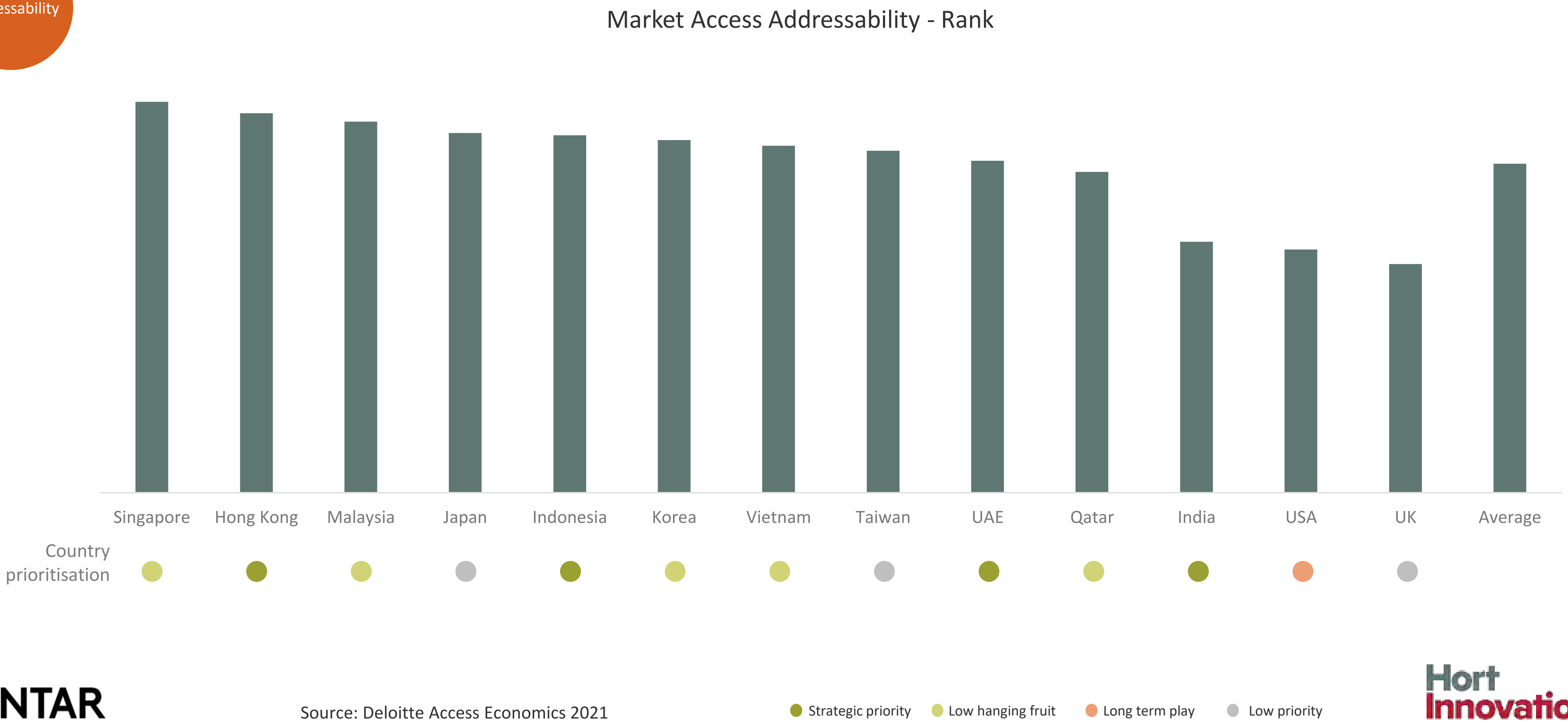
1 An index of the relative likelihood to pay more for blueberries vs other commodities within each market

Source: Kantar HIA International Demand Study 2022

Some markets rank as more addressable due to the ease of trade, market risk and value chain competitiveness

Blueberries

Addressability



Source: Deloitte Access Economics 2021

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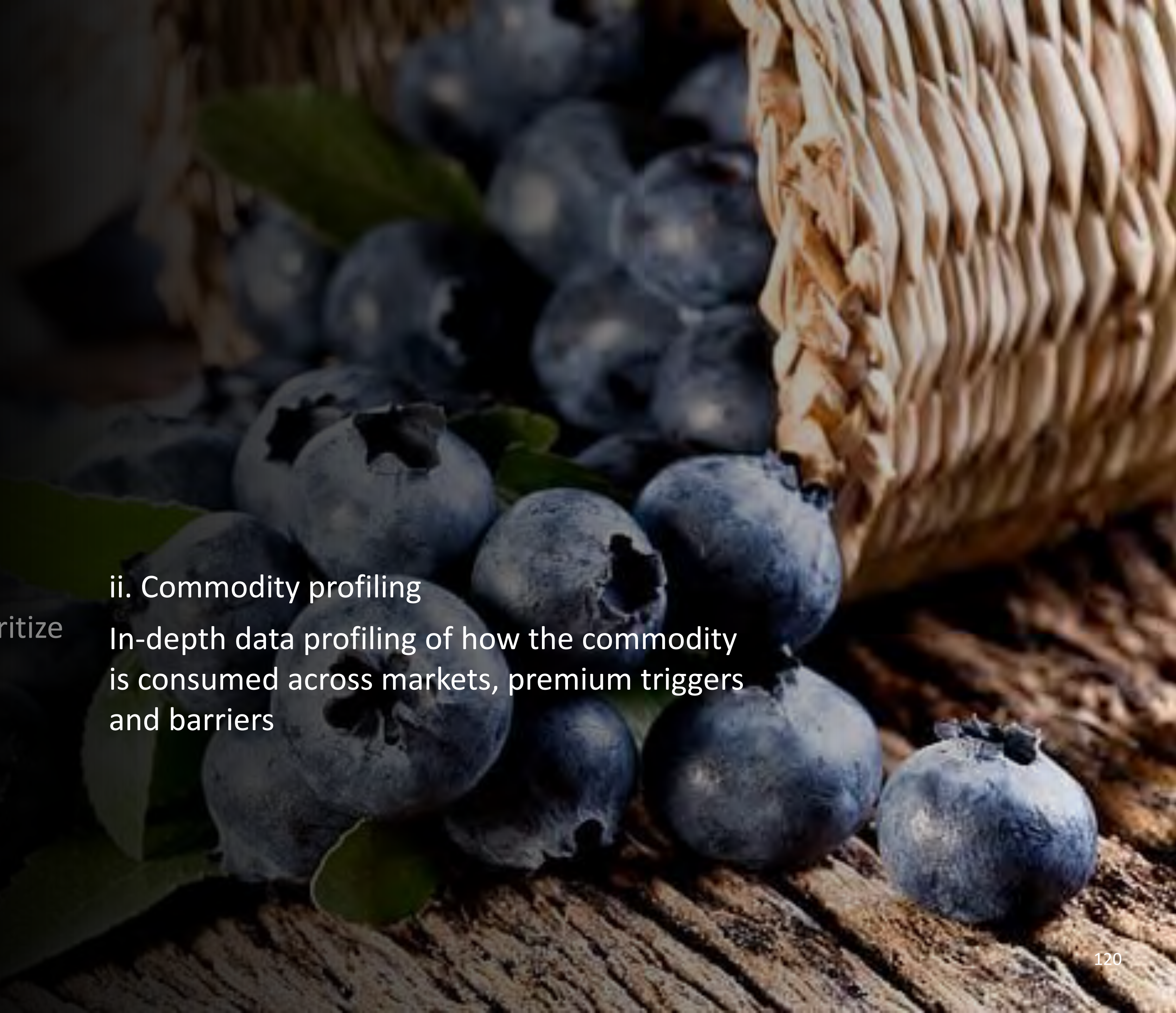
3.3 Blueberries

i. Market prioritisation
Leverage the strategic framework to prioritize markets based on consumer behaviour, perception and market access

ii. Commodity profiling
In-depth data profiling of how the commodity is consumed across markets, premium triggers and barriers



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The prioritisation revealed x4 markets ripe for Blueberries export. The next section will deep dive into Blueberries consumption across markets

Blueberries

USA UK Singapore India Japan Hong Kong South Korea

Market priorities

Malaysia UAE Qatar Taiwan Vietnam Indonesia

Market priorities

Strategic priority Low hanging fruit Long term play Low priority

Blueberries consumption snapshot

Blueberries

	India	Hong Kong	Indonesia	UAE
HOW OFTEN (P1W pen.)	28%	30%	27%	39%
WHEN	Snack between lunch/dinner Breakfast	Snack between lunch/dinner Dinner	Snack between lunch/dinner Dessert	Snack between lunch/dinner Breakfast
HOW	Fresh on its own As part of a snack	Fresh on its own	As part of a snack Fresh on its own	Fresh on its own
WHY	Tasty Connection	Tasty Quick & Easy	Tasty Connection	Tasty Quick & Easy
WHERE	At home	At home	At home	At home
WHO WITH	With Family	With Family	With Family	With Family

Source: Kantar HIA International Demand Study 2022

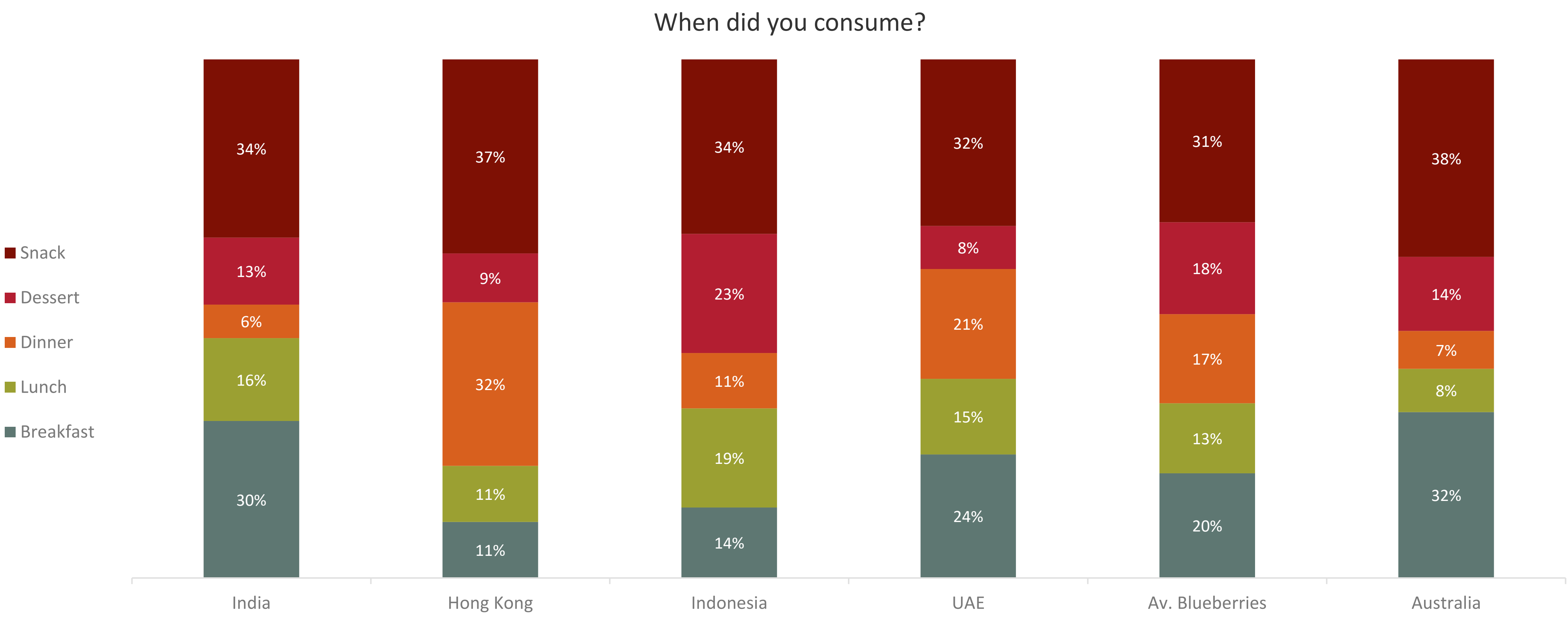
Blueberries: Strategic Imperatives

Blueberries

	India	Hong Kong	Indonesia	UAE
CONSUMER PREFERENCES	As a tasty breakfast or snack between lunch/dinner, fresh on its own, to connect with family at home	As a tasty, quick & easy snack between lunch/dinner or dinner, fresh on its own, at home with family	As a tasty, light snack between lunch/dinner or dessert, fresh on its own or as part of a snack, to connect with family at home	As a tasty quick & easy breakfast or snack between lunch/dinner, fresh on its own, at home with family
NEEDS TO SATISFY	Tasty Connection	Tasty Quick & Easy	Tasty Connection	Tasty Quick & Easy
FUNCTIONAL ATTRIBUTES	Fresh & Light Refreshing Taste	Fresh & Light Sweet	Fresh & Light Refreshing Taste	Refreshing Taste Sweet Fresh & Light
PREMIUM OPPORTUNITY	Fresher Free from Pesticides	Fresher More Flavour Sweeter	Fresher Higher in vitamins & minerals Free from Pesticides	Fresher I trust it's safety
BARRIERS TO OVERCOME	Too expensive	Too expensive	Too expensive More exciting alternatives	Too expensive Will not fill me up
KEY SUBSTITUTES	Apple Bananas	Bananas Apple	Mangoes Apple	Strawberries Table Grapes

Around 1 in 3 consume Blueberries as a snack across priority markets, breakfast in India and UAE, dinner in Hong Kong and lunch in Indonesia

Blueberries



Note: Australian data for "Berries" overall

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	295	294	300	300	297	222	294	294	309	302	40

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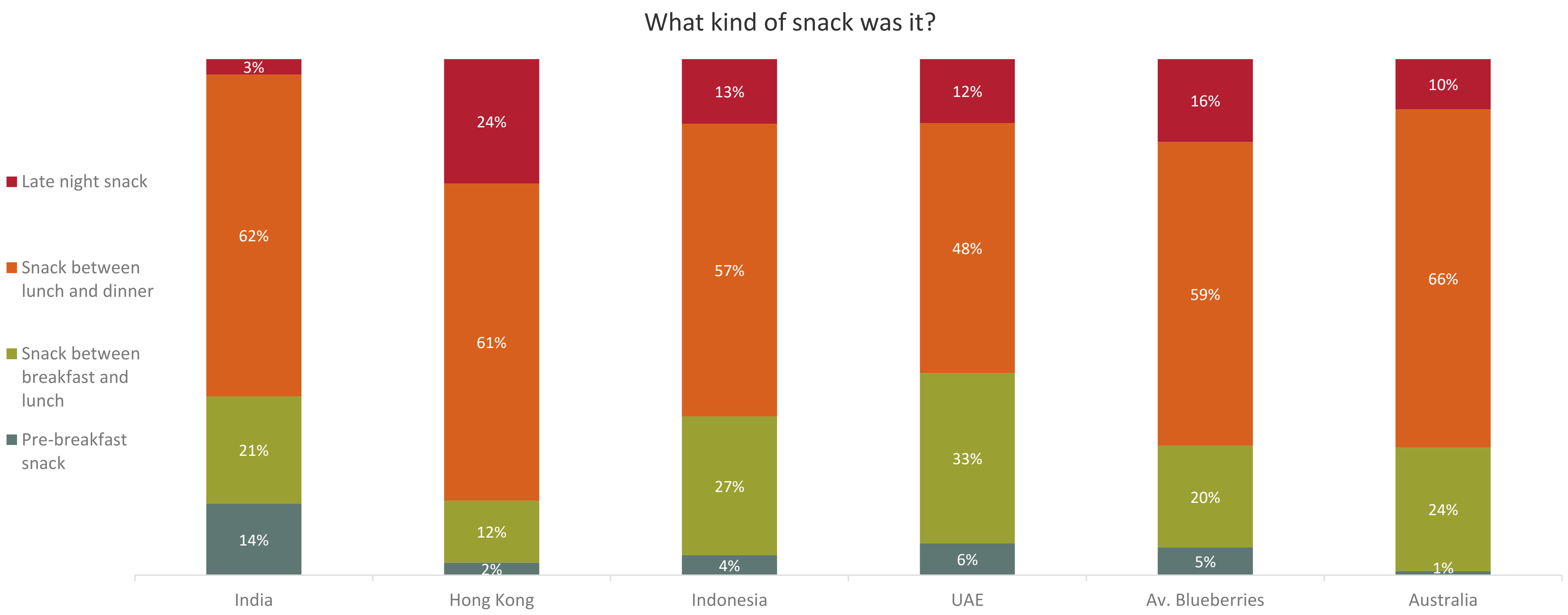
When eaten as a snack, most consume Blueberries between lunch and dinner

Blueberries



Note: Australian data for "Berries" overall
Source: Kantar HIA International Demand Study 2023

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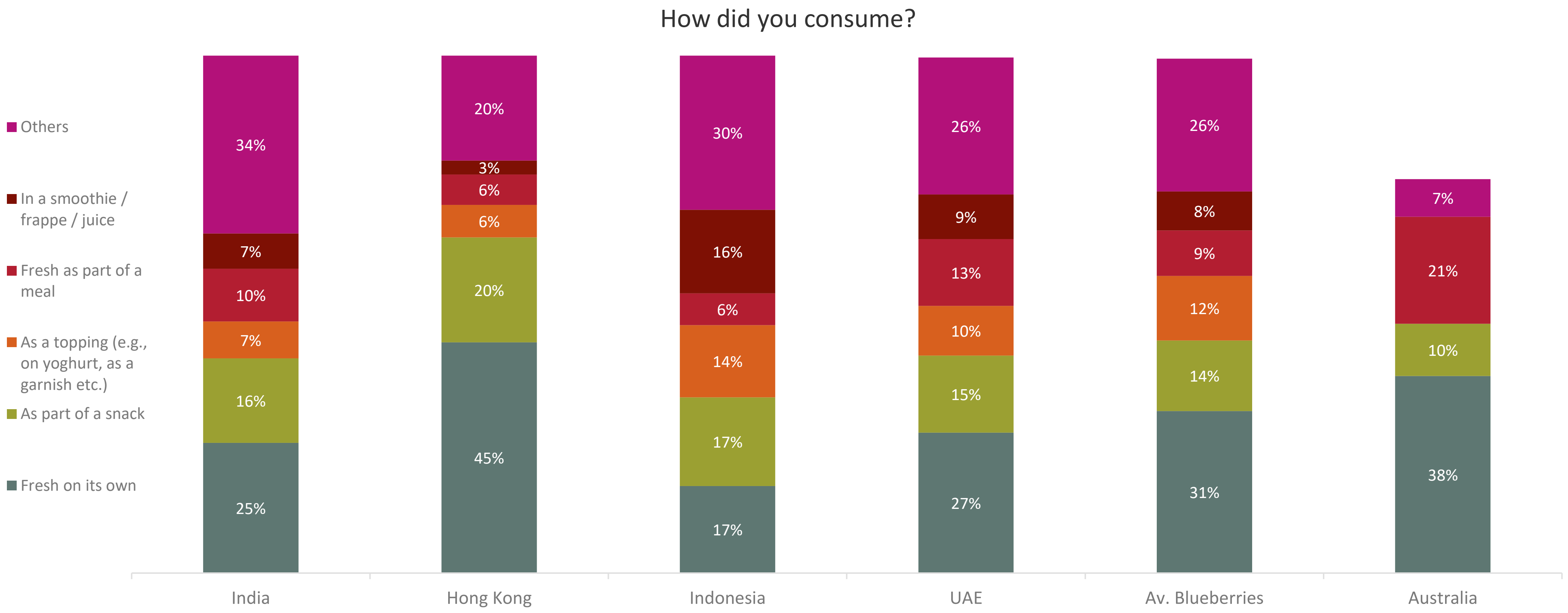
Blueberries are most commonly consumed fresh on their own, especially in Hong Kong. Otherwise they are part of a snack or a topping

Blueberries



Note: Australian data for “Berries” overall

‘Other’ = In a salad, As an ingredient in baking, As an ingredient in cooking, Cooked on its own, To make baby food / puree, For decoration / show only, As part of an alcoholic drink e.g. cocktail and Don't know

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	295	294	300	300	297	222	294	294	309	302	40

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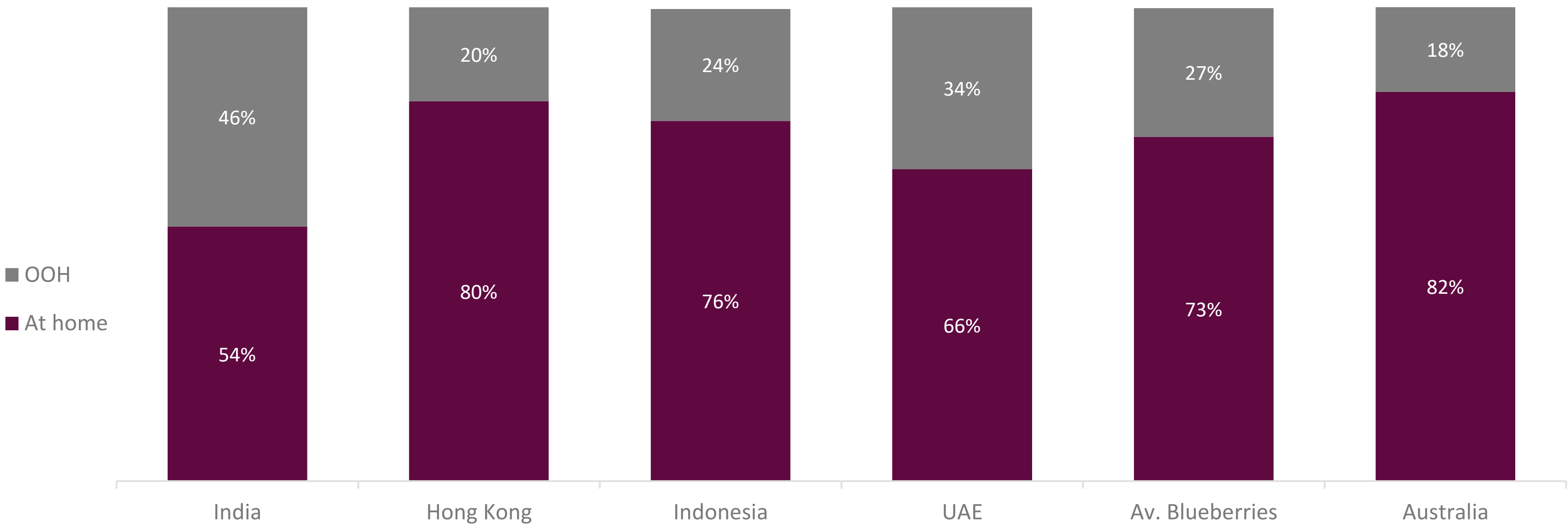
Most people consume Blueberries at home. India and UAE skew more out of home

Blueberries

Where were you?

73%

Of consumption of blueberries is in the home, this varies only slightly by market



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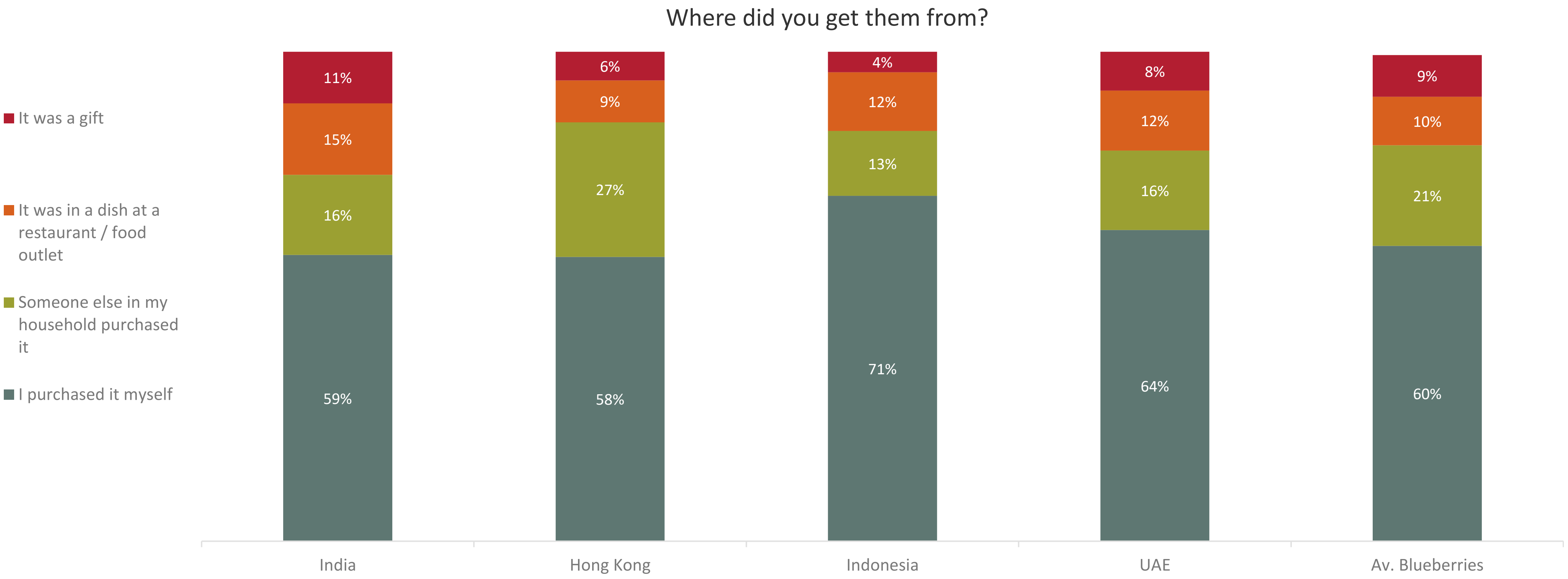
	293	300	295	294	300	300	297	222	294	294	309	302	40

Most people purchase Blueberries themselves

Blueberries



Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	295	294	300	300	297	222	294	294	309	302	40

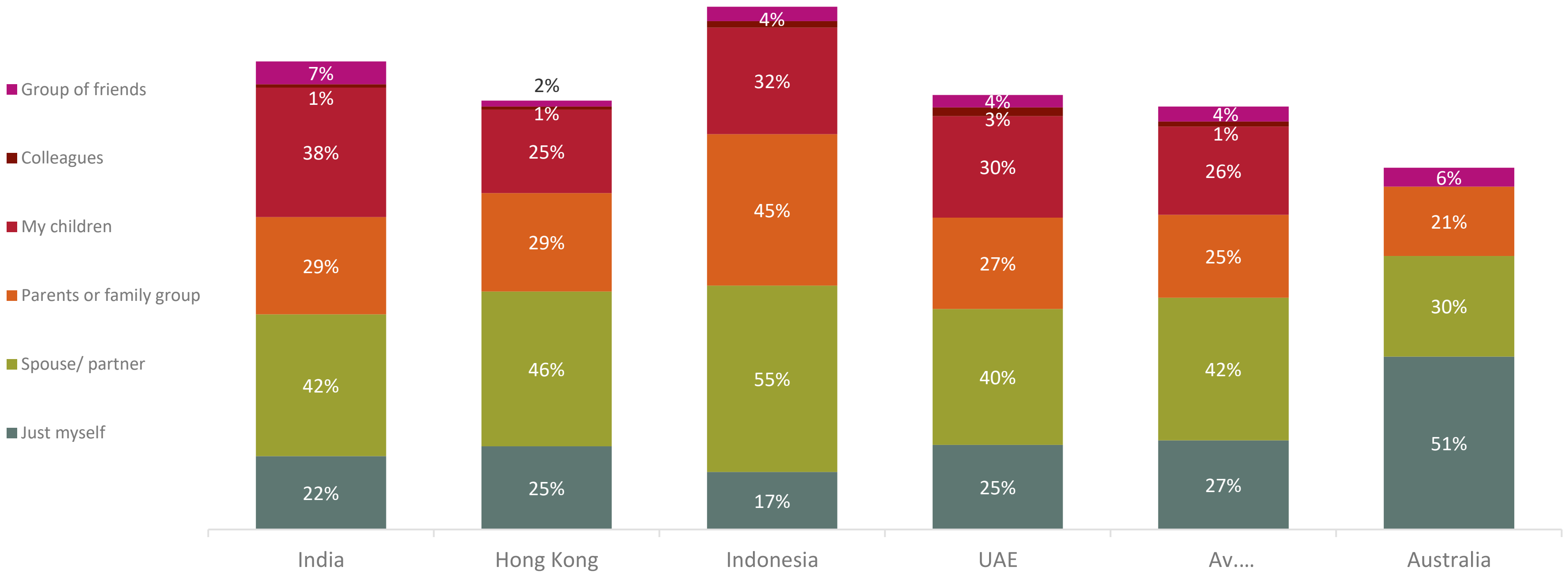
Blueberries are most frequently consumed along with a spouse or partner or the broader family group

Blueberries

Who were you with?

42%

Of consumption of blueberries (on average) is with a spouse/partner.



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	293	300	295	294	300	300	297	222	294	294	309	302	40

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There is a range of reasons why people choose to eat different fruits & vegetables. There are
6 universal consumer needs pillars that drive this choice for consumers globally

The 6 needs pillars are universal across commodities and global markets

Tasty

All about: Taste, Refreshment, and Enjoyment

Quick & Easy

All about: Convenience Simplicity, and Ease

Healthy & Nutritious

All about: Guilt-free, Nourishing and Sensible

Indulgence

All about: Comfort, Relaxation and Self Care

Physical & Mental Energy

All about: Energy, Uplift, and Reinvigoration

Connection

All about: Bonding, Celebration and Creating Memories

In priority markets, the most important reasons why people choose to consume Blueberries are for something tasty, quick & easy and indulgent

47%

of people in priority markets consume Blueberries for something

Tasty

45%

of people in priority markets consume Blueberries for something

Quick & Easy

41%

of people in priority markets consume Blueberries for an

Indulgence

Taste is the most important consumption driver across all markets, followed by Quick & Easy or Connection in India and Indonesia

Blueberries

Which were important when choosing to consume?

	India	Hong Kong	Indonesia	UAE	Av	Aus
Tasty	57%	51%	66%	54%	56%	71%
Quick & Easy	43%	46%	45%	47%	44%	63%
Healthy & Nutritious	41%	32%	45%	31%	36%	42%
Indulgence	46%	34%	44%	40%	37%	26%
Physical & Mental Energy	32%	18%	31%	26%	23%	27%
Connection	48%	20%	47%	35%	30%	17%

Note: Australian data for "Berries" overall

Source: Kantar HIA International Demand Study 2023

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	293	300	295	294	300	300	297	222	294	294	309	302	40

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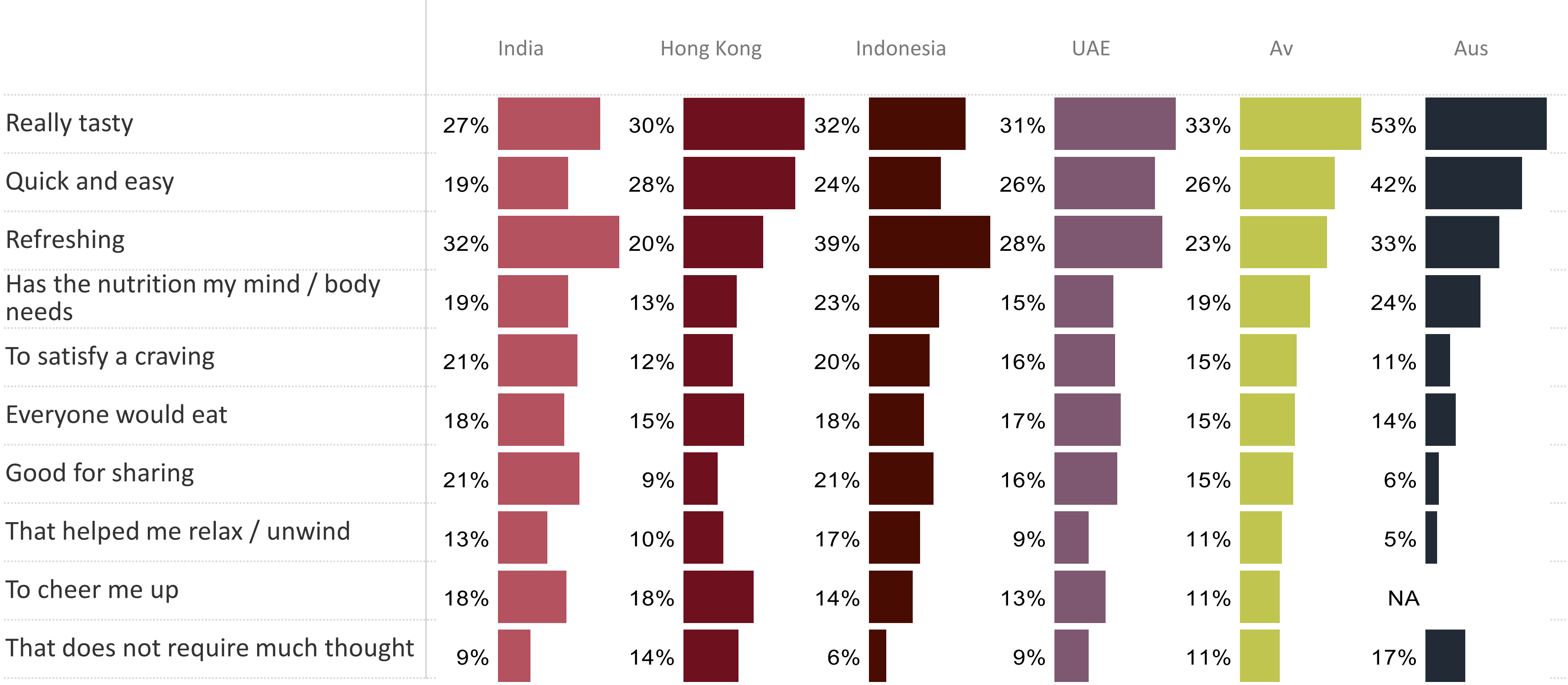
Blueberries

More specifically, Blueberries are consumed as they are ‘really tasty’, ‘quick and easy’ and in India and Indonesia especially, are ‘refreshing’

Which were important when choosing to consume?



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Hort Innovation

More functionally, consumers are looking for Blueberries that are fresh and light with a refreshing, sweet taste

26%

of people in priority markets are looking for Blueberries that are

Fresh / Light

25%

of people in priority markets are looking for Blueberries that are

Refreshing Taste

23%

of people in priority markets are looking for Blueberries that are

Sweet

Consumers are looking for Blueberries that are fresh and light, sweet and have a refreshing taste

Blueberries

What were you looking for when you consumed?

	India	Hong Kong	Indonesia	UAE	Av
Sweet	21%	25%	24%	20%	24%
Refreshing taste	24%	16%	34%	25%	23%
Fresh / Light	27%	23%	35%	20%	22%
Rich in anti-oxidants	17%	17%	22%	16%	19%
Good source of minerals & vitamins / Nutritionally dense	11%	13%	24%	13%	16%
Quick / easy to prepare	11%	16%	16%	10%	14%
Low in calories	14%	16%	14%	12%	14%
Considered a superfood	9%	10%	11%	11%	12%
Contains fibre	12%	16%	16%	9%	11%
Low in fat	18%	11%	14%	13%	10%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	295	294	300	300	297	222	294	294	309	302	40

When it comes to the premium opportunity, consumers are looking for Blueberries that are fresher, sweeter with more flavour and are higher in vitamin & minerals

42%

of people in priority markets are looking for premium Blueberries that are

Fresher

26%

of people in priority markets are looking for premium Blueberries that are

Sweeter

26%

of people in priority markets are looking for premium Blueberries that have

More Flavour

24%

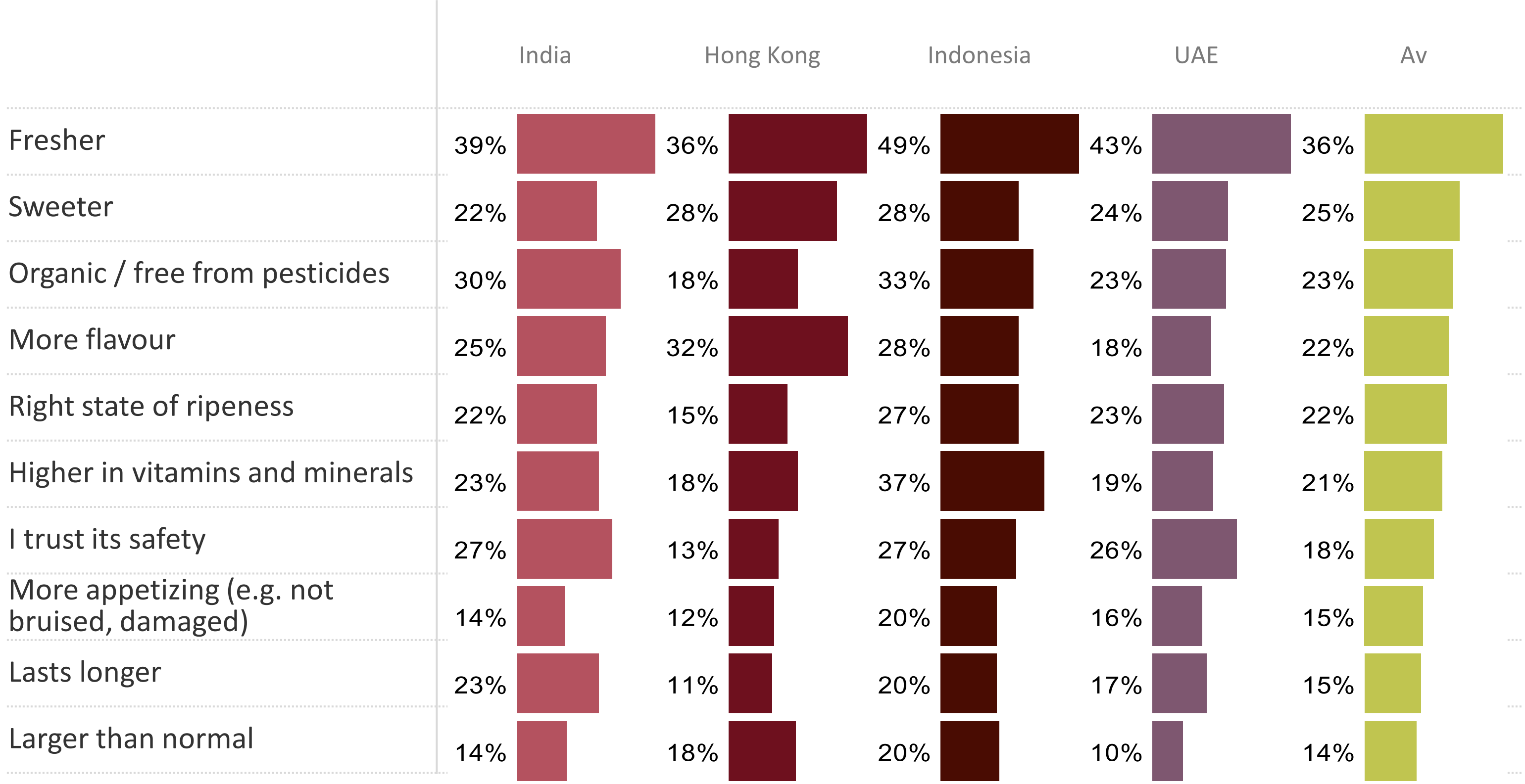
of people in priority markets are looking for premium Blueberries that are

Higher in vitamins

Premium quality is characterised by freshness. In Hong Kong more flavour and in Indonesia organic or free from pesticides are also important

Blueberries

What does premium quality mean to you?



Price is the biggest barrier to overcome with Blueberry consumption, followed by exciting alternatives and bruising easily.

Apples and Banana are considered worthy substitutes

Barriers to Consumption

Price	Exciting Alternatives	Bruise Easily
31% (priority market average)	16% (priority market average)	15% (priority market average)

Leading Substitutes

Apples	Banana	Mango
29% (priority market average)	28% (priority market average)	23% (priority market average)

Price is the most significant barrier across priority markets, along with more exciting alternatives in Indonesia

Blueberries

What are the reasons you may not choose?

	India	Hong Kong	Indonesia	UAE	Av
It is too expensive	27%	40%	32%	25%	35%
It bruises easily	14%	21%	13%	13%	14%
It goes off too quickly / it does not last	12%	14%	13%	15%	12%
There are more exciting alternatives	17%	6%	25%	16%	12%
Quality is often poor	12%	17%	17%	16%	12%
It will not fill me up	16%	10%	11%	18%	10%
They are never in the right state of ripeness when sold in shops	10%	9%	11%	11%	9%
Not enough people in my household like it/them	13%	7%	10%	13%	8%
Too much packaging	12%	9%	7%	9%	7%
The quantity is more than I typically need	10%	7%	7%	7%	7%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	295	294	300	300	297	222	294	294	309	302	40

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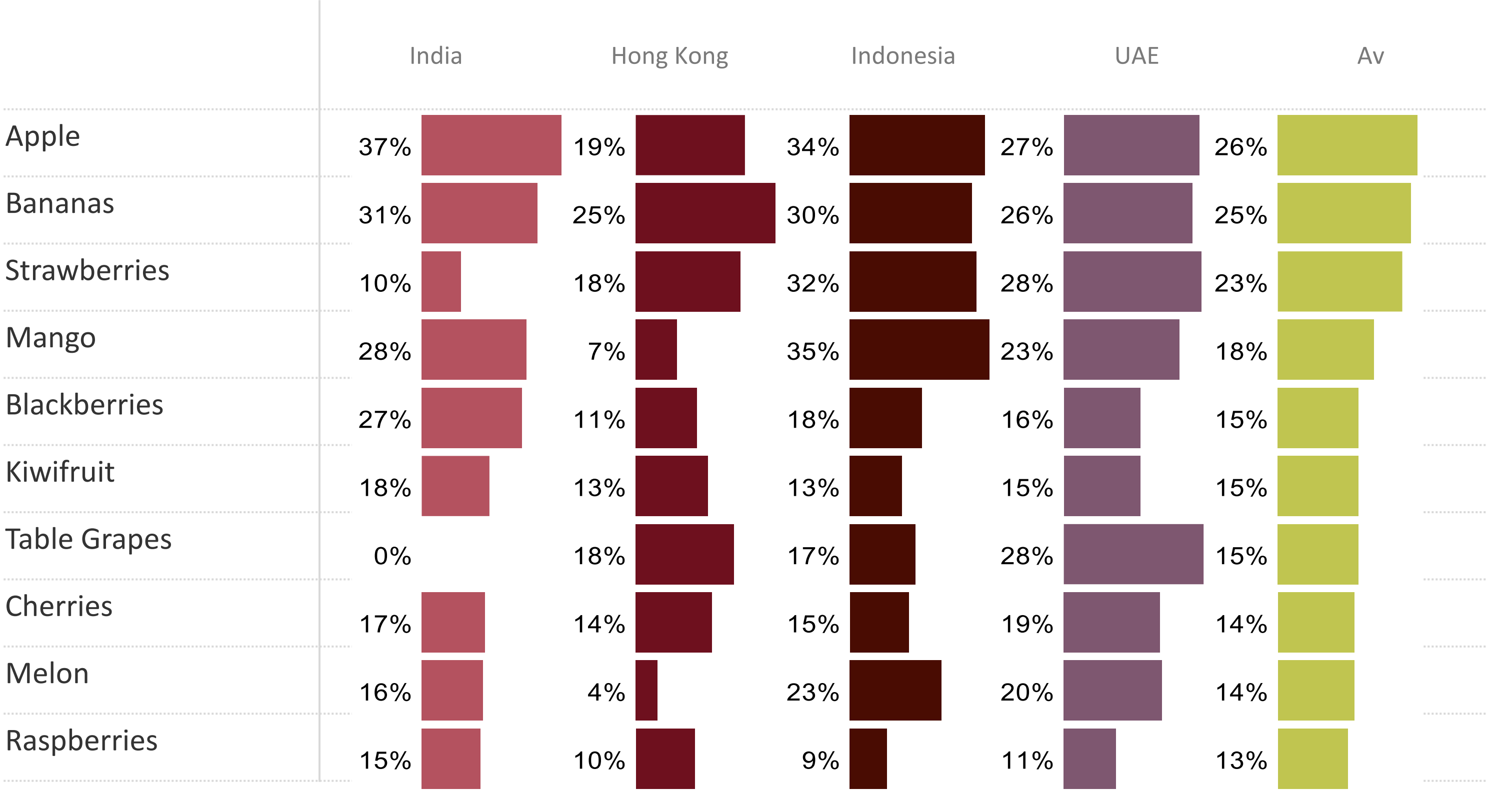
Apples and Bananas are key substitutes in priority markets, along with Table Grapes in UAE and Mangos in India, Indonesia and UAE

What else would you typically consider having instead?



Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	295	294	300	300	297	222	294	294	309	302	40

Recommendation: How to drive growth in Australian Blueberries

Blueberries

1. Focus on Strategic Priority Markets

Focus on markets where consumers are **willing to pay a premium** for quality Blueberries (ie. **Indonesia, Hong Kong, UAE and India**). Leverage already **high appeal for Australian Blueberries across all priority markets**, to drive incremental growth in Australian Blueberry exports.

2. Deliver Core Consumer Needs

Deliver the core consumer needs across priority markets with Blueberries that are **refreshing, tasty**, and **indulgent to share**. Ensure Blueberries are at or above par for being **sweet, fresh and light, that serve as a quick and easy snack or meal ingredient.**

3. Leverage Premium Advantage

Maximise the premium opportunity by delivering Blueberries that are fresher, sweeter, more flavourful, and are higher in vitamins and minerals.

4. Reduce Consumption Barriers

Address perceptions that Blackberries are **too expensive, bruise easily** and **are less exciting than alternatives**, to minimise consumer drift to close substitutes like Apples, Bananas, and Mangoes**.**

'Where to Play'

← *'How to Win'* →

KANTAR

3.4

Cherries

i. Market prioritisation

Leverage the strategic framework to prioritize markets based on consumer behaviour, perception and market access

ii. Commodity profiling

In-depth data profiling of how the commodity is consumed across markets, premium triggers and barriers

Hort Innovation

4 key considerations when interpreting the outputs of the Market Prioritisation

1. No Existing Technical Market Access

2. Markets with Existing Trade

3. Premium Opportunities

4. Focus of Investment

1. No Existing Technical Market Access

Existing technical market access for a commodity was **intentionally NOT included** in the evaluation of addressability

Rationale:

- This project was designed to identify attractive and addressable **future** growth geographies therefore the analysis was not restricted by current arrangements
- This research is intended to **support and inform industry** decisions regarding the progress of any potential future or ongoing market access or market improvement request

2. Markets with Existing Trade

While the addressability calculation includes data on general market access and trade, it intentionally does not include whether Australia currently trades in a particular commodity

Rationale:

- The objective of this analysis is to provide an objective assessment of whether a market is attractive and addressable independent of current arrangements
  - If a market that we are currently trading with for a particularly commodity is shown NOT to be a ‘Strategic Priority’, this does NOT mean that we should consider withdrawing from this market.
  - However, we recommend re-evaluating the relative focus of investment in this market, and consider other markets when looking for **future** growth opportunities

3. Premium Opportunity

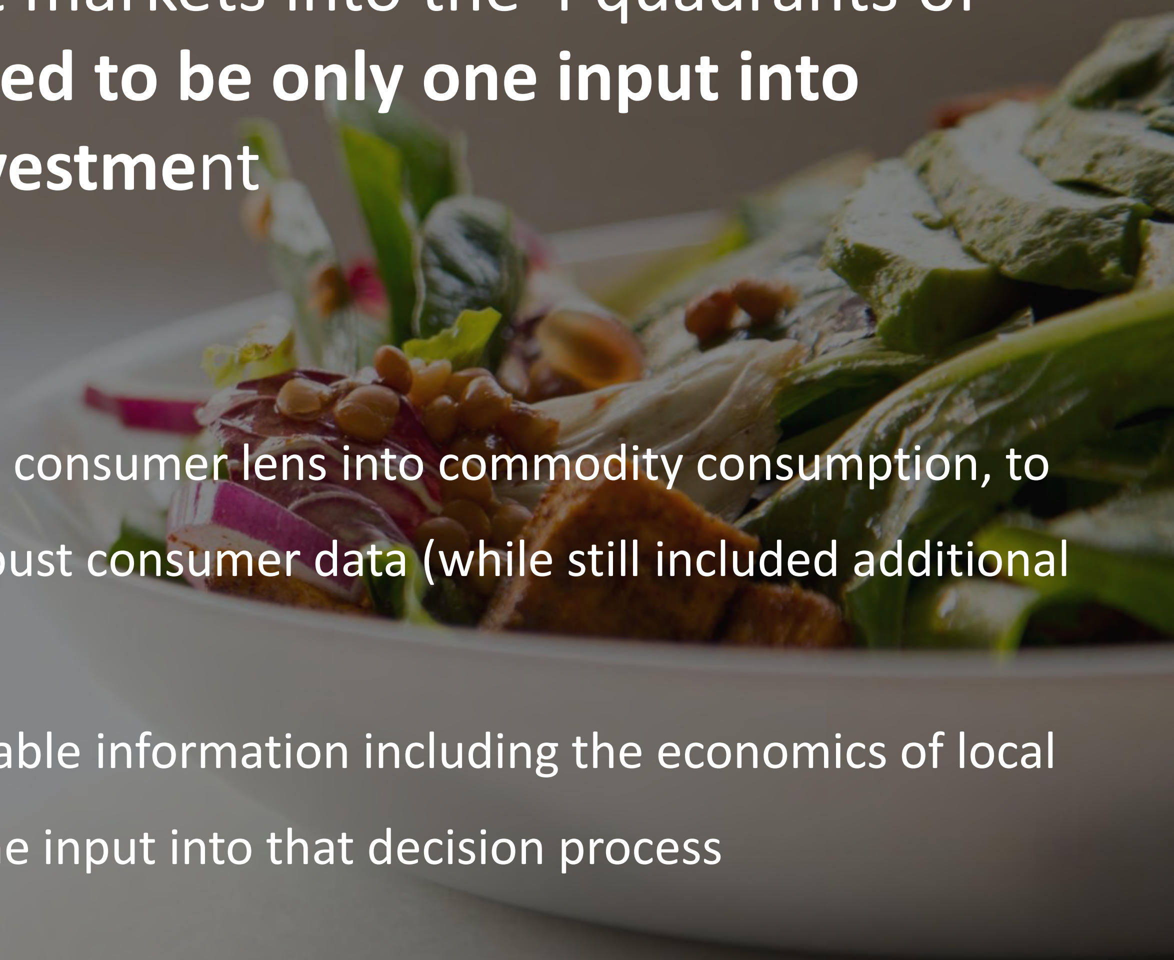
In evaluating attractive and addressable export markets, we have intentionally used data that shows where premium opportunities can be found

Rationale:

- The overall objective of this project was to identify **profitable** growth opportunities for commodities in the future, and Australian commodities will have more chance of growing profitably where they have a better chance for commanding a price premium
  - High commodity penetration in a market has also been used to evaluate attractiveness, but this analysis favours markets where there is a larger opportunity for Australian products to command a **premium**.

4. Focus of Investment

The evaluation and prioritisation of export markets into the 4 quadrants of attractiveness and addressability **is intended to be only one input into decision making** about **where to focus investment**

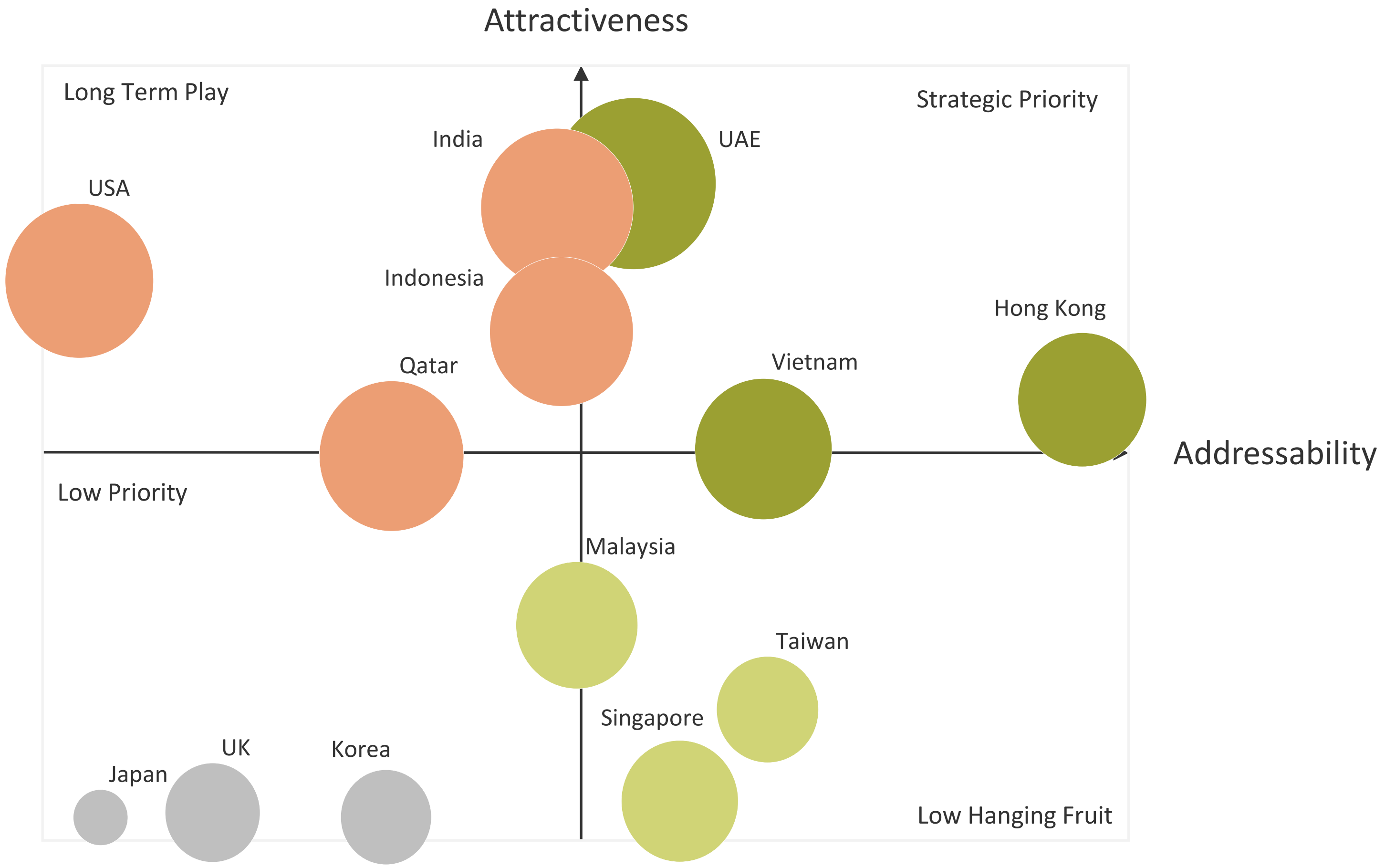


Rationale:

- The objective of this project was primarily to offer a consumer lens into commodity consumption, to enable export decisions to be informed by more robust consumer data (while still included additional market factor data from previous Deloitte analysis)
    - Export decisions should be made using all available information including the economics of local growers and exporters and this report forms one input into that decision process

We have identified 3 strategic priority markets that represent the most attractive and appealing export opportunity for Australian cherries

Cherry



- **Strategic priority**
- **Low hanging fruit**
- **Long term play**
- **Low priority**

Size of the bubble = penetration

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Source: Kantar HIA International Demand Study 2022, World Bank 2021

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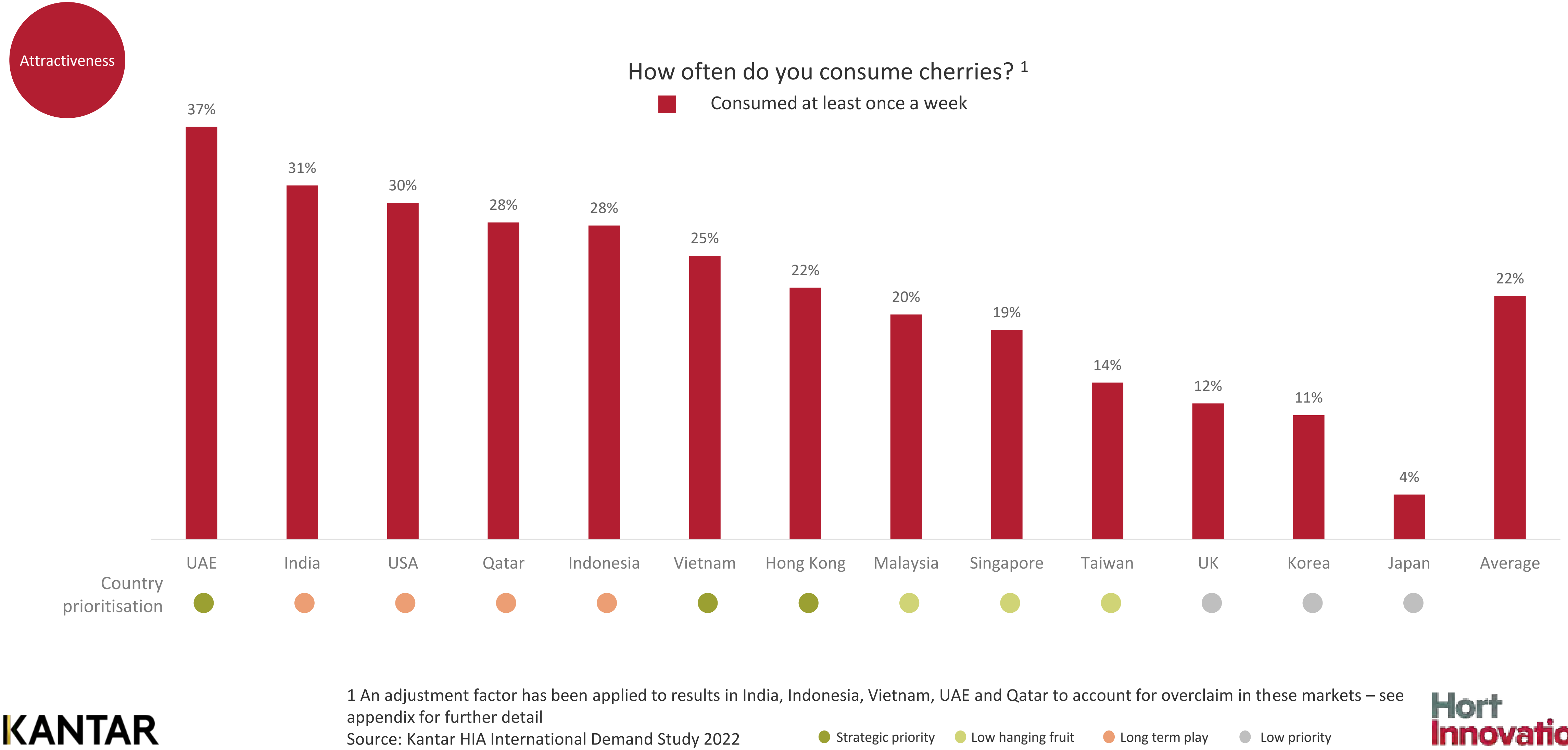
Cherries: Summary of Strategic Priorities

Cherry

	Hong Kong	UAE	Vietnam
STRATEGIC IMPLICATIONS	Despite moderate penetration, exporting cherries to Hong Kong represents a highly addressable opportunity given the it's the top market for both Australian appeal and premium quality appeal	By contrast, the UAE is an attractive opportunity (due to high penetration and willingness to pay more, alongside high income per-capita), however, addressability metrics are more moderate	Vietnam is a more addressable market than average given there's strong premium appeal of cherries, however, penetration and Australian appeal is moderate
ATTRACTIVENESS	• Moderate penetration • Very high willingness to pay 1.5x more for premium quality cherries (#1 ranking market)	• Highest penetration of all markets (35% consume weekly) • High willingness to pay more for premium quality	• Moderate penetration • High willingness to pay more for premium quality
ADDRESSABILITY	• Very high (#1 ranking) Australian appeal • Strong premium appeal vs. other commodities in Hong Kong (#1 ranking)	• Moderate Australian appeal • Strong premium appeal vs. other commodities	• Moderate Australian appeal • Strong premium appeal vs. other commodities

Cherries are most frequently consumed in the UAE, India and USA with approx. 1 in 3 people in these markets consuming them weekly

Cherry



1 An adjustment factor has been applied to results in India, Indonesia, Vietnam, UAE and Qatar to account for overclaim in these markets – see appendix for further detail

Source: Kantar HIA International Demand Study 2022

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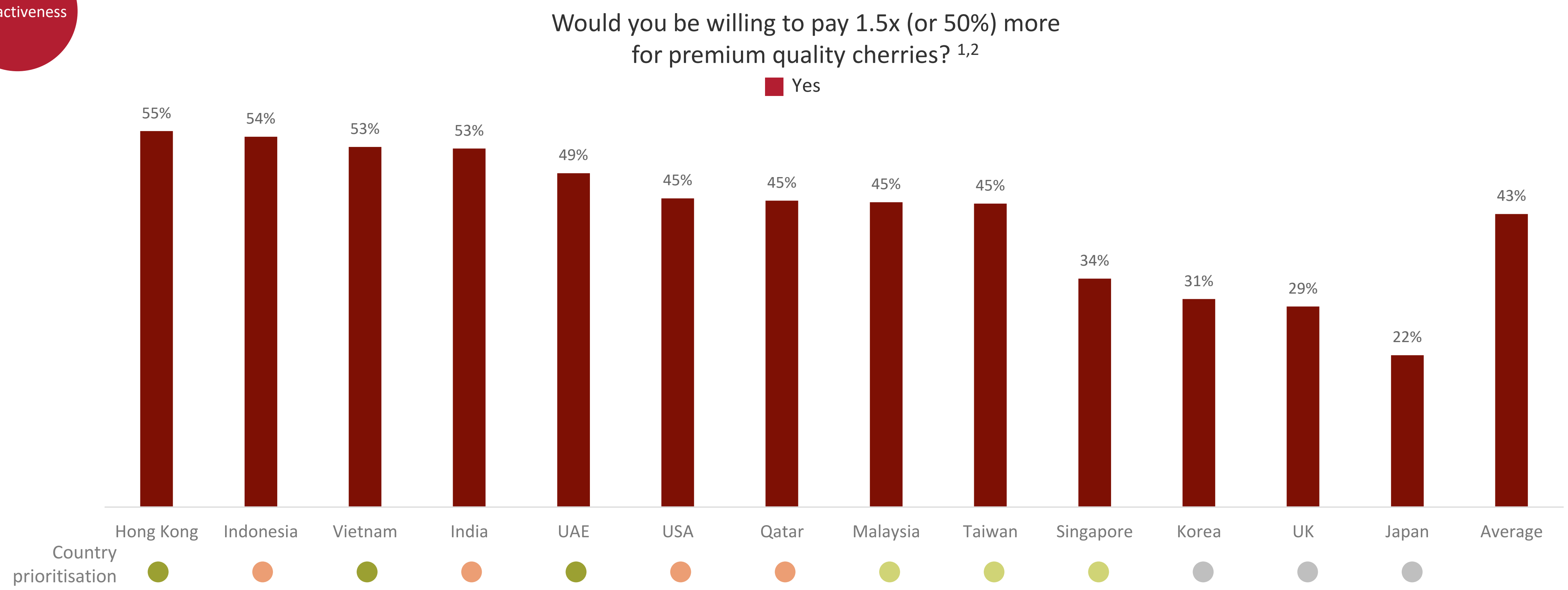
Across most markets cherries have the potential to command a premium price, especially in Hong Kong

Cherry

Attractiveness



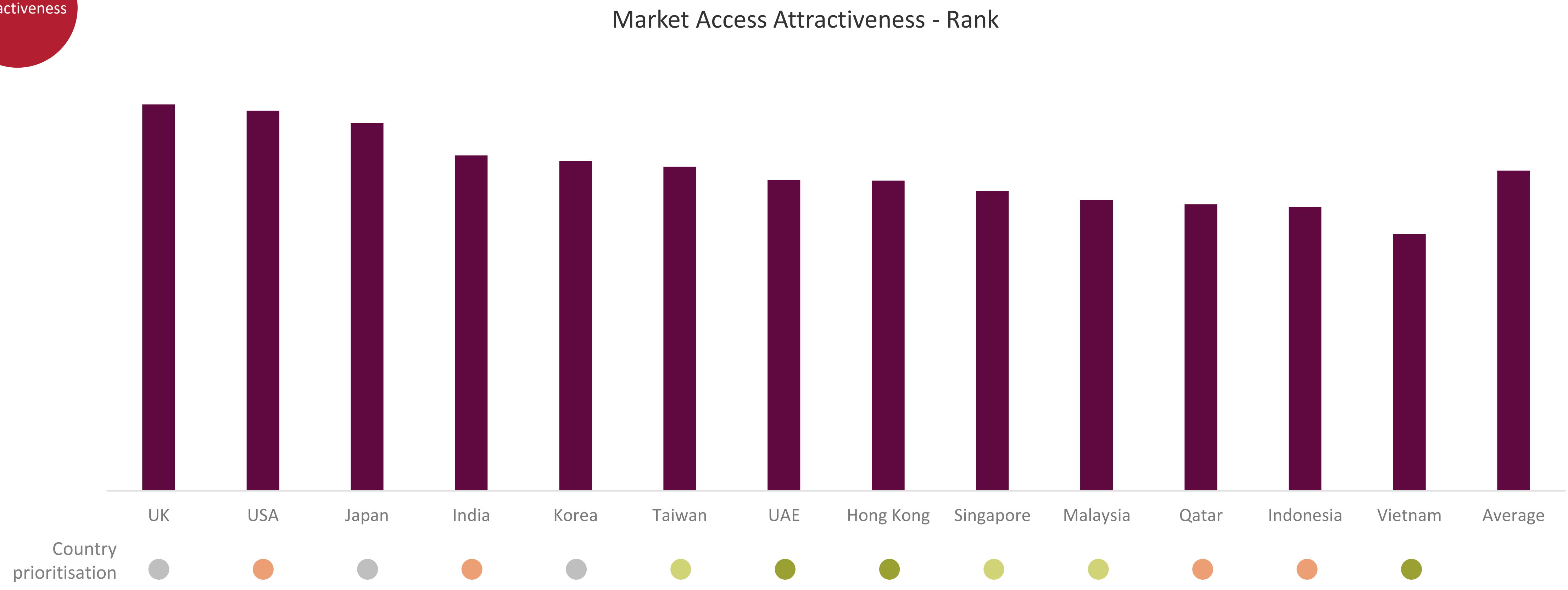
1 Consumers asked if they would be willing to pay 50% more than they currently pay in their market (no price specified)
2 An adjustment factor has been applied to results in India, Indonesia, Vietnam, UAE and Qatar to account for overclaim in these markets – see appendix for further detail
Source: Kantar HIA International Demand Study 2022

Strategic priority · Low hanging fruit · Long term play · Low priority

Although all markets are attractive, more affluent markets with larger populations rank more highly

Cherry

Attractiveness



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Source: Deloitte Access Economics 2021

Strategic priority
Low hanging fruit
Long term play
Low priority

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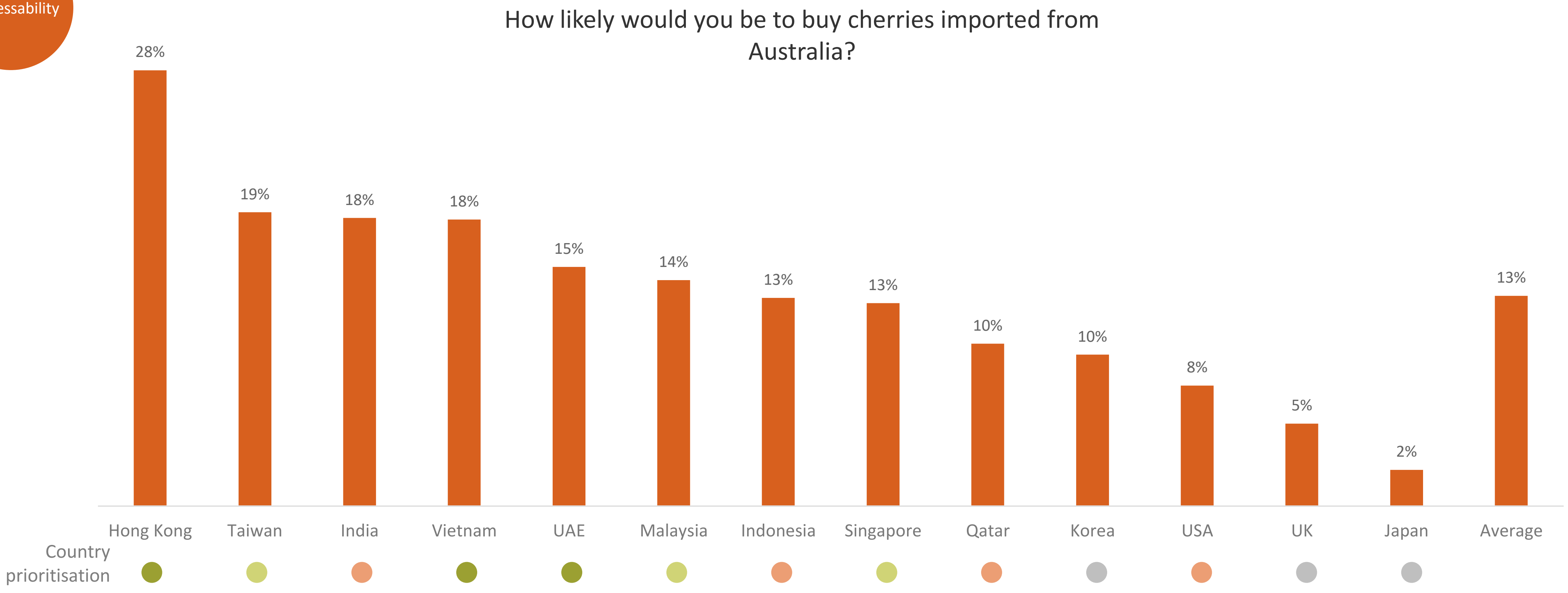
Cherries have strong Australian appeal. This is especially true in Hong Kong where there's a significant premium opportunity too

Cherry

Addressability



Source: Kantar HIA International Demand Study 2022

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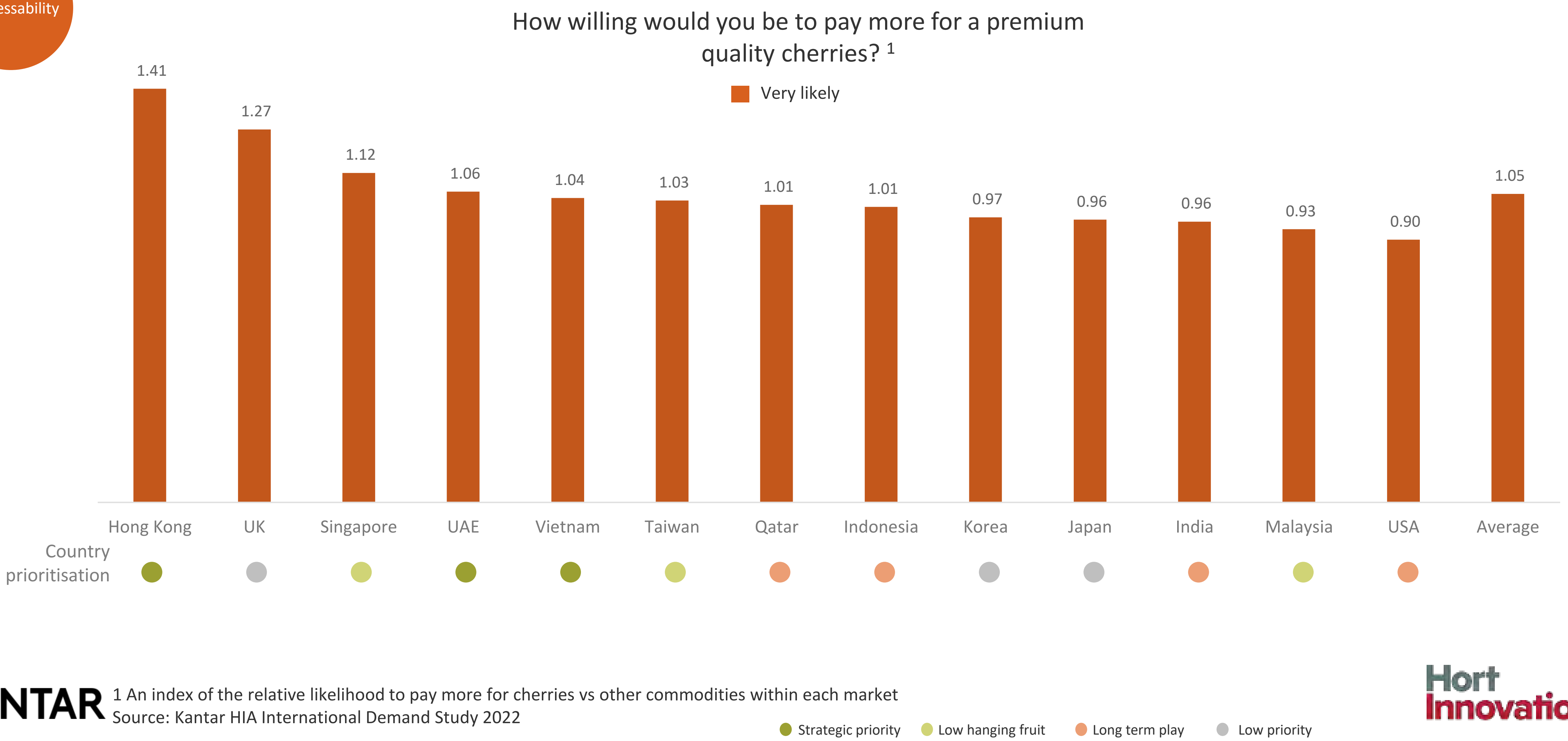
Relative desire for premium vs other commodities is strongest in Korean, UK and Singaporean markets

Cherry

Addressability



1 An index of the relative likelihood to pay more for cherries vs other commodities within each market
Source: Kantar HIA International Demand Study 2022

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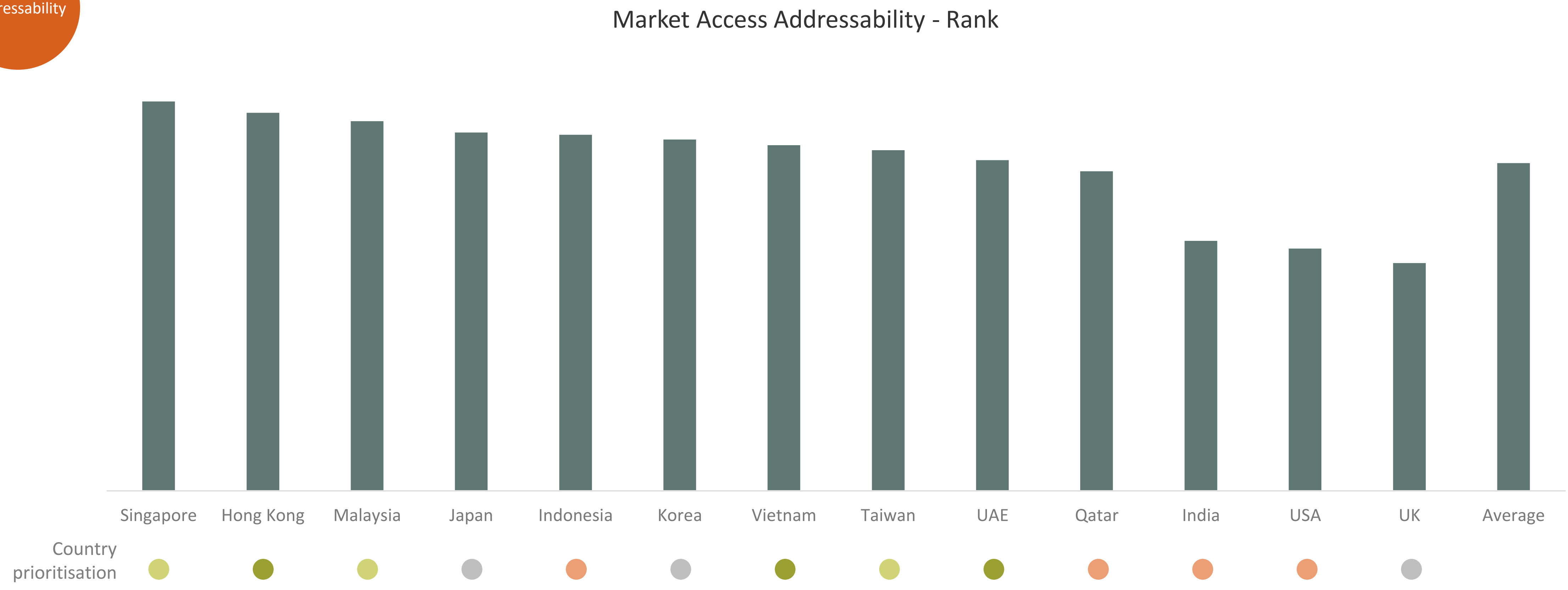
Some markets rank as more addressable due to the ease of trade, market risk and value chain competitiveness

Cherry

Addressability



Source: Deloitte Access Economics 2021

Strategic priority · Low hanging fruit · Long term play · Low priority

3.4

Cherries

i. Market prioritisation

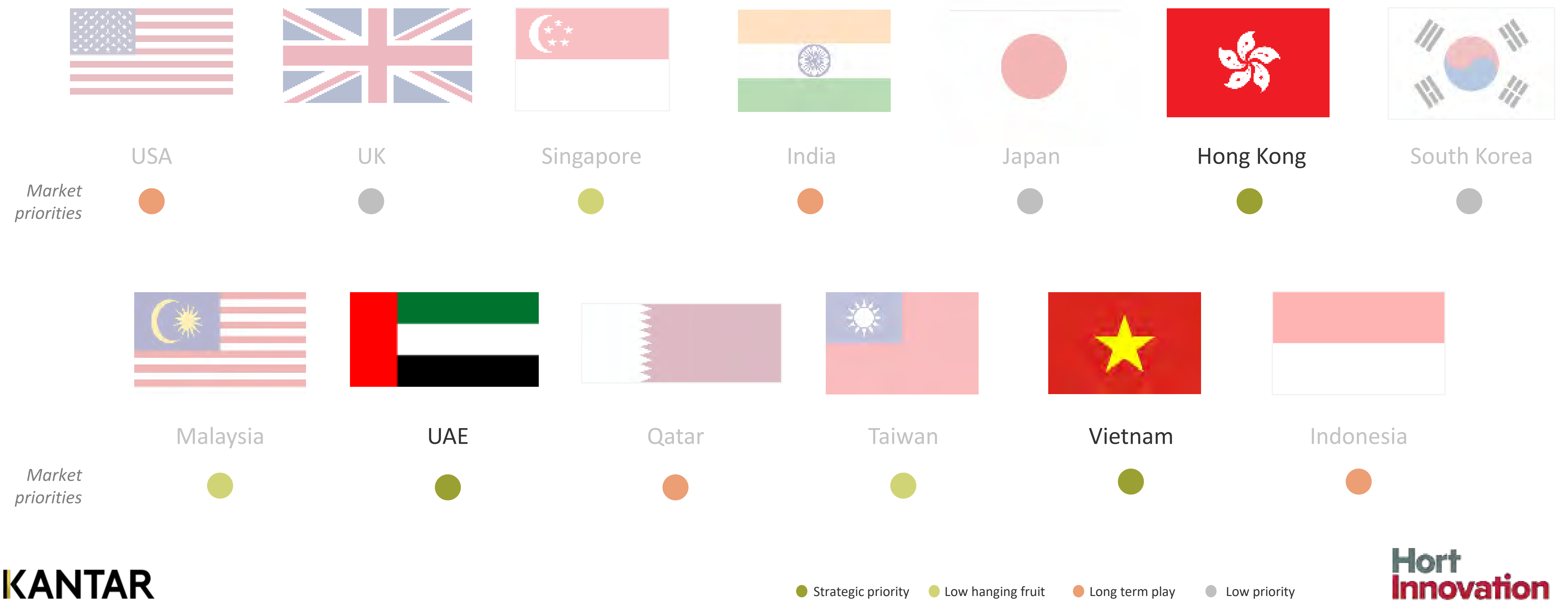
Leverage the strategic framework to prioritize markets based on consumer behaviour, perception and market access

ii. Commodity profiling

In-depth data profiling of how the commodity is consumed across markets, premium triggers and barriers

The prioritisation revealed x3 markets ripe for Cherry export.
The next section will deep dive into Cherry consumption across markets

Cherry



Cherries consumption snapshot

Cherry

	Hong Kong	Vietnam	UAE
HOW OFTEN (P1W pen.)	22%	25%	37%
WHEN	Dinner Snack	Lunch Dessert	Snack Lunch
HOW	Fresh on its own	Fresh on its own	Fresh on its own
WHY	Tasty Quick & Easy	Tasty Indulgence	Tasty Quick & Easy
WHERE	At home	At home	At home
WHO WITH	With Family	With Family	With Family

Source: Kantar HIA International Demand Study 2022

Cherries: Strategic Imperatives

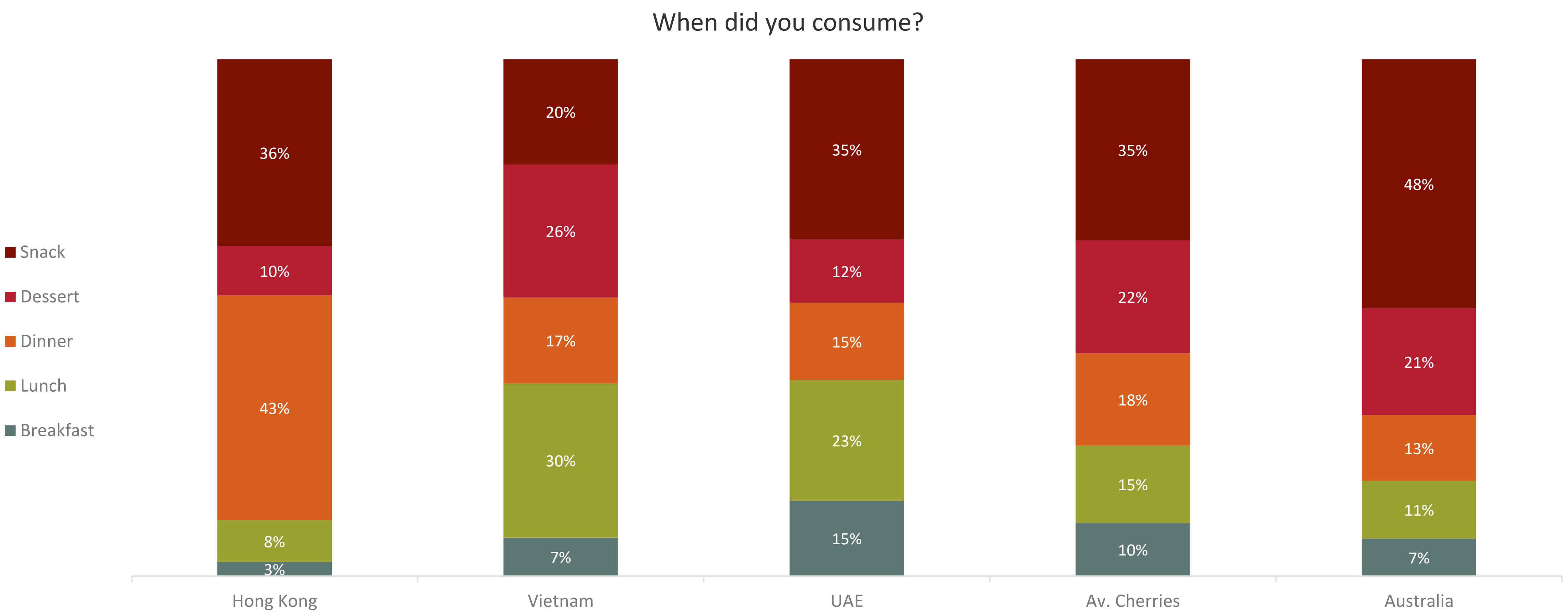
Cherry

	Hong Kong	Vietnam	UAE
CONSUMER PREFERENCES	As a tasty and quick & easy snack or dinner, fresh on its own, at home with family	As a tasty and indulgent lunch or dessert, fresh on its own, at home with family	As a tasty, quick & easy snack or lunch, fresh on its own, at home with family
NEEDS TO SATISFY	Tasty Quick & Easy	Tasty Indulgence	Tasty Quick & Easy
FUNCTIONAL ATTRIBUTES	Sweet Fresh & Light	Refreshing Taste Sweet	Refreshing Taste Sweet
PREMIUM OPPORTUNITY	Fresher More Flavour Sweeter	Fresher Sweeter Free from Pesticides	Fresher Free from Pesticides
BARRIERS TO OVERCOME	Too expensive	Too Expensive Bruises Easily	Too expensive
KEY SUBSTITUTES	Strawberries Table Grapes	Apple Table Grapes	Table Grapes Bananas Apple

Source: Kantar HIA International Demand Study 2022

Cherries are consumed as a snack or with dinner in Hong Kong, lunch or dessert in Vietnam, snack or lunch in UAE

Cherry



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Source: Kantar HIA International Demand Study 2023

	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
N=	292	300	295	295	305	301	297	221	294	295	293	295	40

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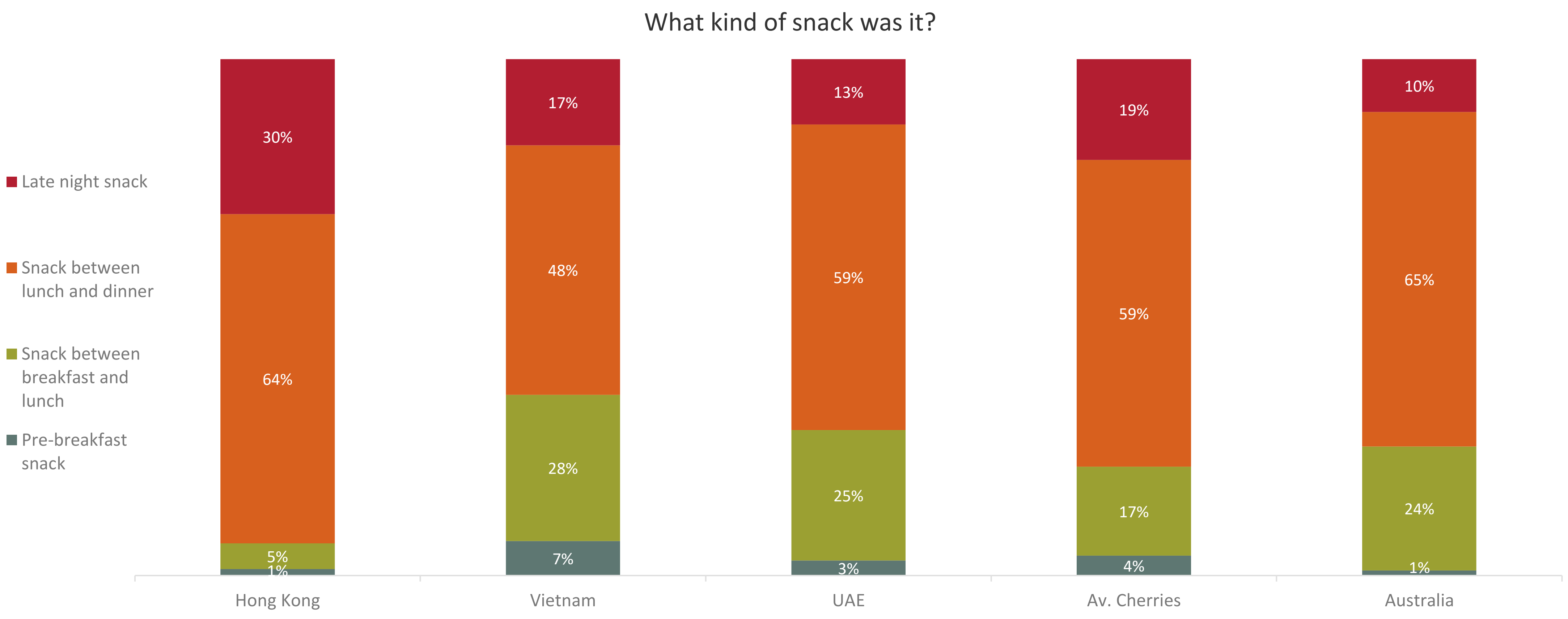
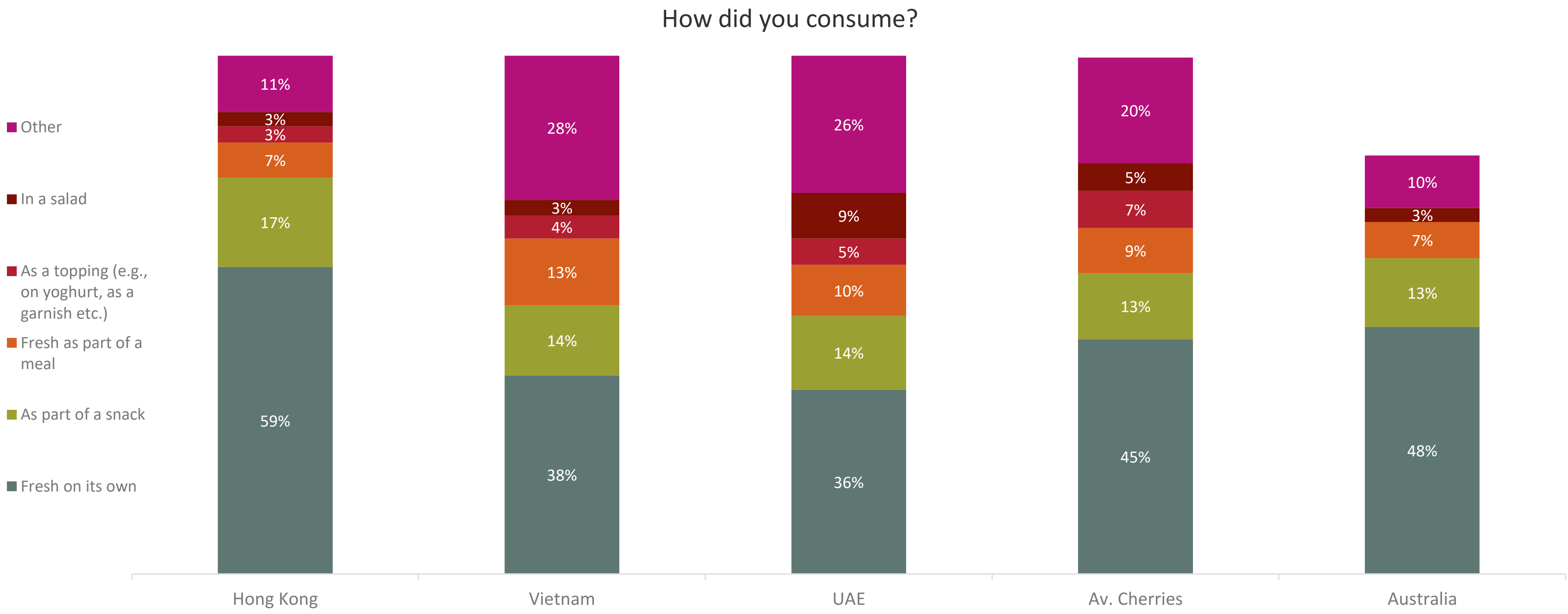
When consumed as a snack Cherries are consumed between lunch and dinner

Cherry



Source: Kantar HIA International Demand Study 2023

Cherries are most frequently consumed on their own, especially in Hong Kong



'Other' = In a smoothie / frappe / juice, As an ingredient in baking, Cooked on its own, For decoration / show only, As an ingredient in cooking, As part of an alcoholic drink e.g. cocktail, To make baby food / puree and Don't know

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	295	295	305	301	297	221	294	295	293	295	40

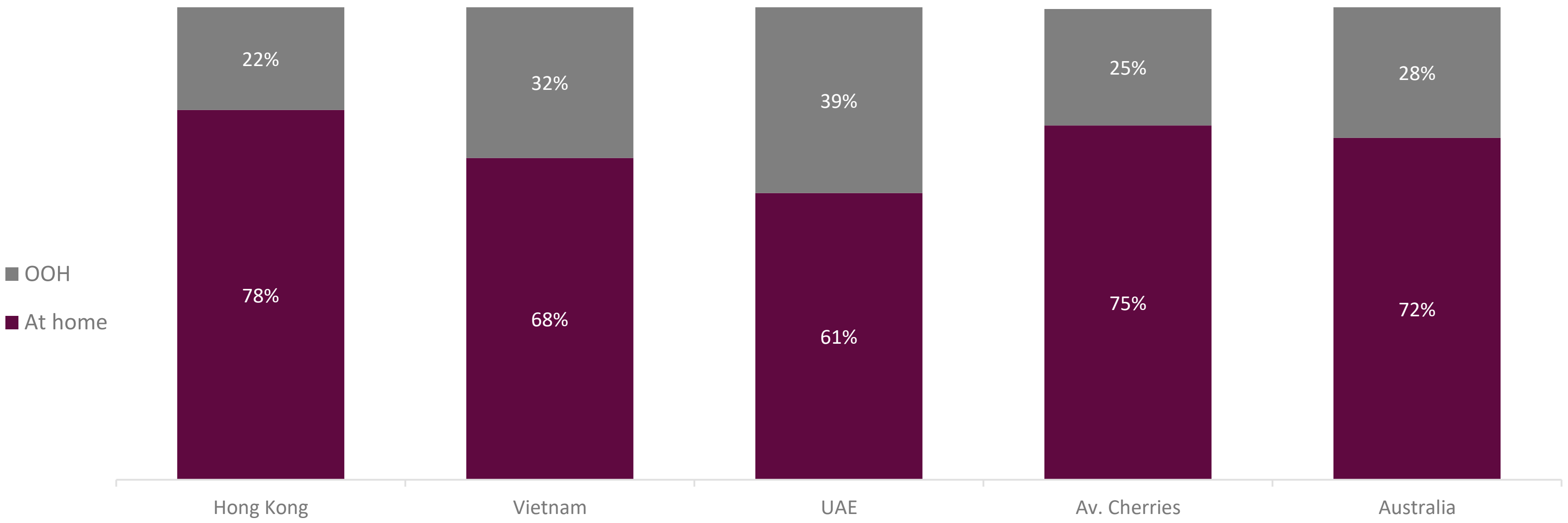
Most people consume Cherries at home. UAE skews more out of home

Cherry

Where were you?

75%

Of consumption of Cherries is in the home, this varies only slightly by market



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Source: Kantar HIA International Demand Study 2023

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	292	300	295	295	305	301	297	221	294	295	293	295	40

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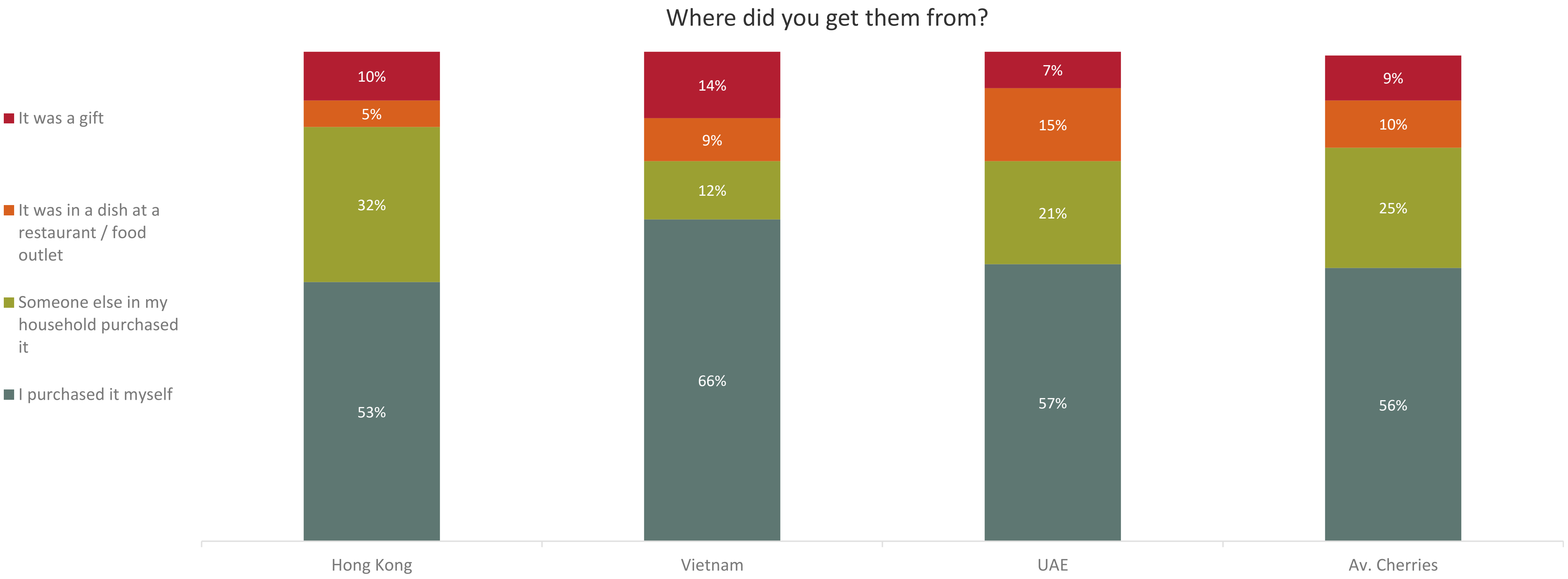
Most people purchase Cherries themselves

Cherry



Source: Kantar HIA International Demand Study 2023

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	292	300	295	295	305	301	297	221	294	295	293	295	40

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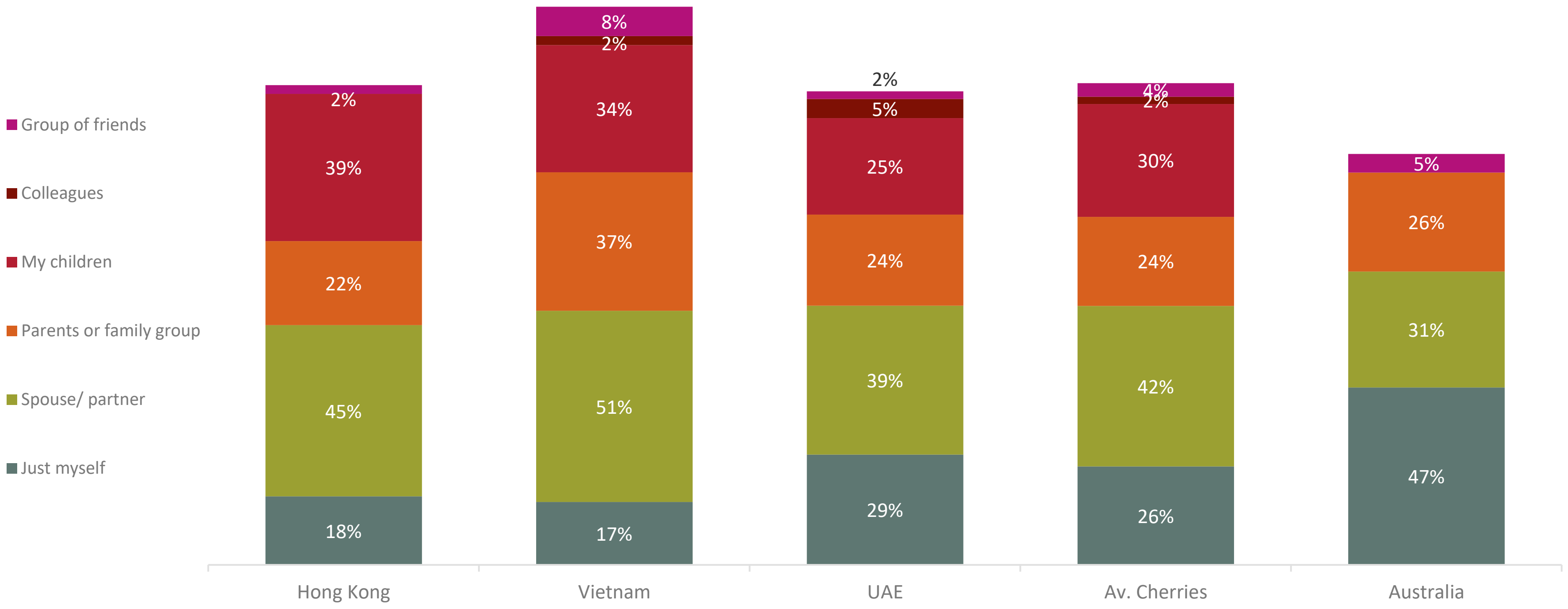
Cherries are typically consumed with a spouse or partner or with a broader family group

Cherry

Who were you with?

30%

Of consumption of cherries (on average) is with children.



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	292	300	295	295	305	301	297	221	294	295	293	295	40

There is a range of reasons why people choose to eat different fruits & vegetables. There are
6 universal consumer needs pillars that drive this choice for consumers globally

KANTAR

Hort Innovation

The 6 needs pillars are universal across commodities and global markets






Tasty	Quick & Easy	Healthy & Nutritious	Indulgence	Physical & Mental Energy	Connection
All about: Taste, Refreshment, and Enjoyment	*All about:* Convenience Simplicity, and Ease	*All about:* Guilt-free, Nourishing and Sensible	*All about:* Comfort, Relaxation and Self Care	*All about:* Energy, Uplift, and Reinvigoration	*All about:* Bonding, Celebration and Creating Memories

In priority markets, the most important reasons why people choose to consume Cherries are for something tasty, indulgent and quick & easy

59%

of people in priority markets consume Cherries for something

Tasty

41%

of people in priority markets consume Cherries for something

Indulgent

40%

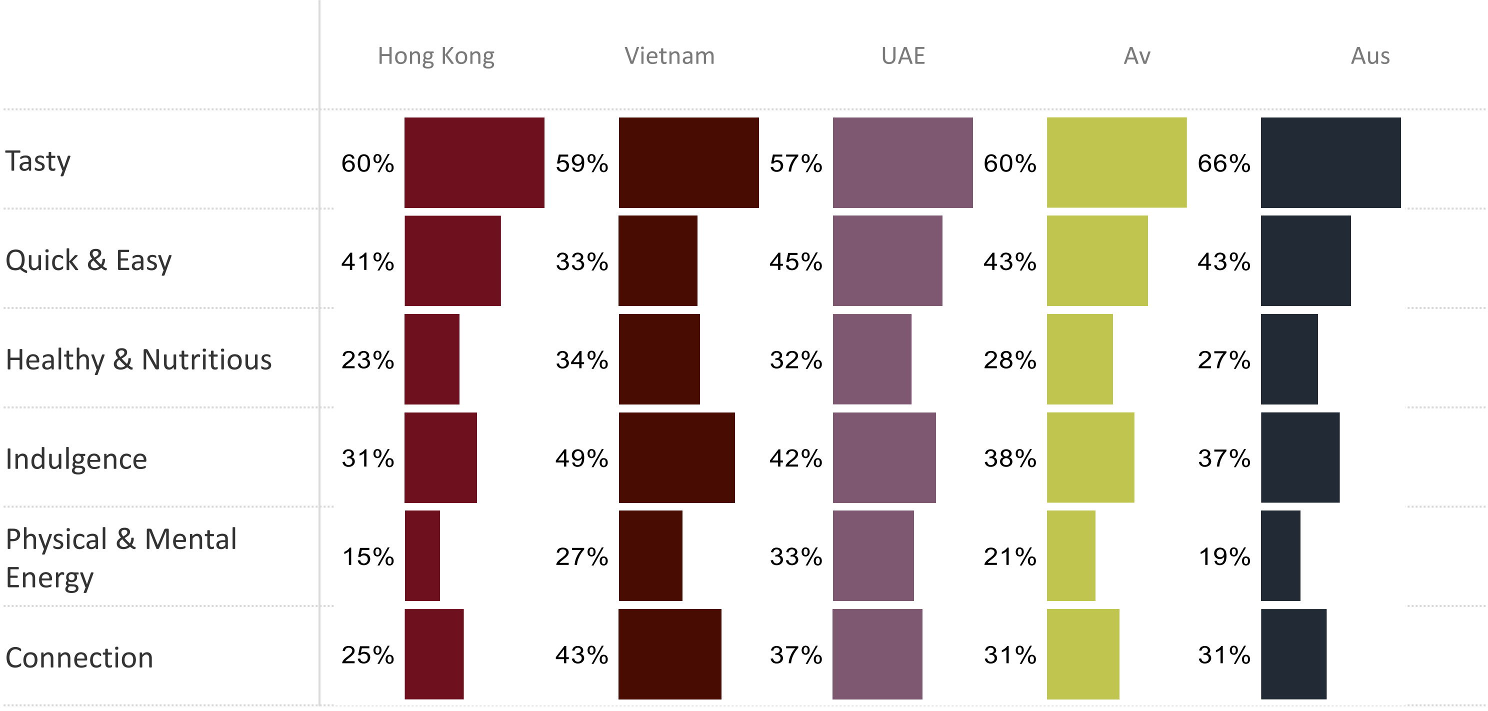
of people in priority markets consume Cherries for something

Quick & Easy

Cherry

Taste is the most important consumption driver across all markets, followed by Quick & Easy in Hong Kong and Indulgence in Vietnam and UAE

Which were important when choosing to consume?



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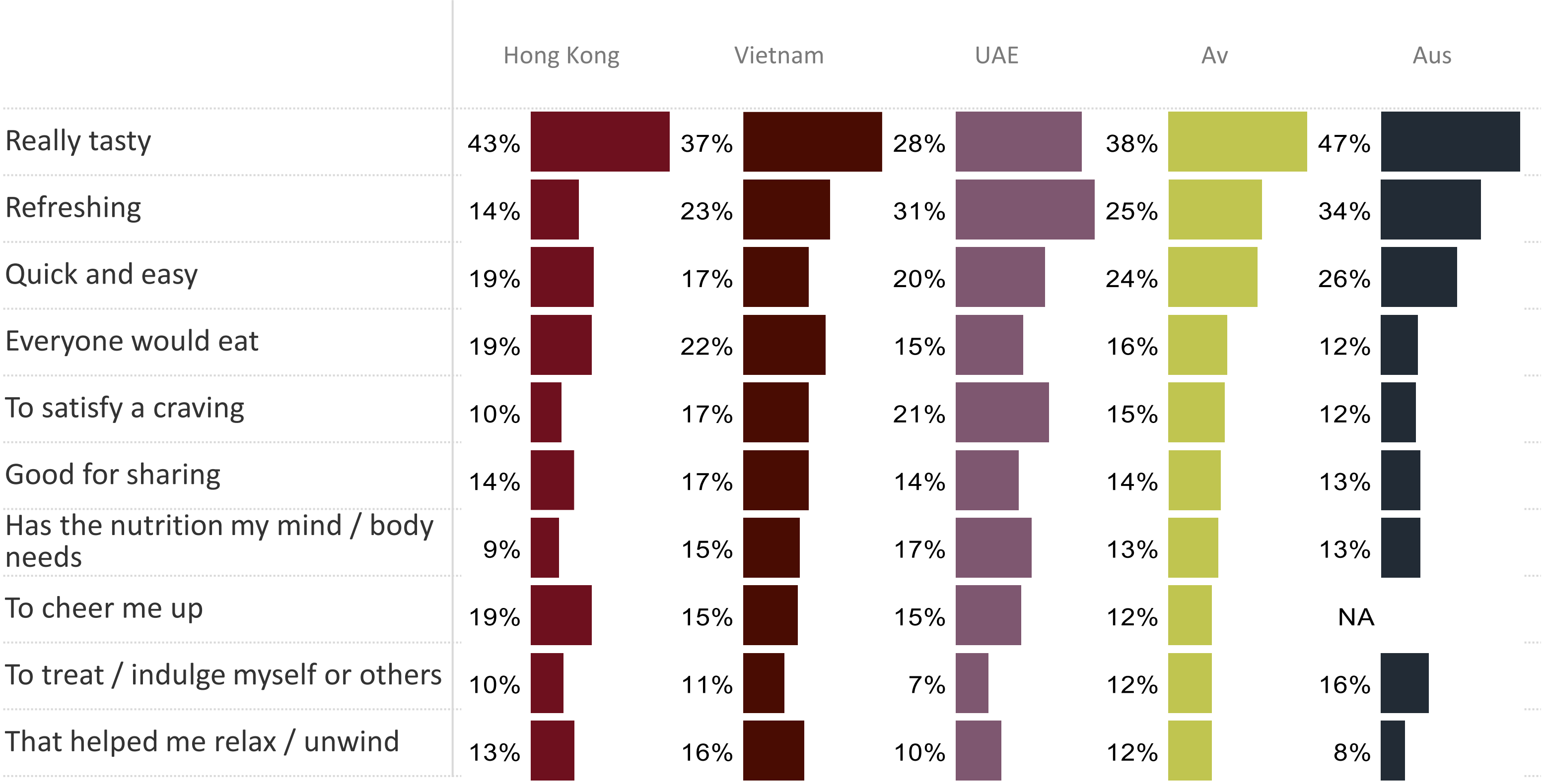
	292	300	295	295	305	301	297	221	294	295	293	295	40

Specially consumers are looking for Cherries that are ‘really tasty’ and in UAE ‘refreshing’

Cherry

Which were important when choosing to consume?



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	292	300	295	295	305	301	297	221	294	295	293	295	40

Hort Innovation

More functionally, consumers are looking for Cherries that are fresh and light with a sweet, refreshing taste

27%

of people in priority markets are looking for Cherries that are

Sweet

23%

of people in priority markets are looking for Cherries that have a

Refreshing Taste

22%

of people in priority markets are looking for Cherries that are

Fresh / Light

Cherry

Across priority markets consumers are looking for Cherries that are sweet. In Vietnam and UAE consumers also look for refreshing taste and in Hong Kong fresh light

What were you looking for when you consumed?

	Hong Kong	Vietnam	UAE	Av
Sweet	35%	20%	25%	34%
Refreshing taste	14%	28%	26%	27%
Fresh / Light	26%	18%	23%	23%
Rich in anti-oxidants	14%	16%	13%	14%
Quick / easy to prepare	19%	6%	10%	14%
Good source of minerals & vitamins / Nutritionally dense	9%	13%	13%	13%
Fun / exciting	5%	16%	13%	12%
Low in calories	8%	11%	12%	10%
Contains fibre	13%	14%	7%	10%
To aid digestion	15%	19%	12%	9%

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	295	295	305	301	297	221	294	295	293	295	40

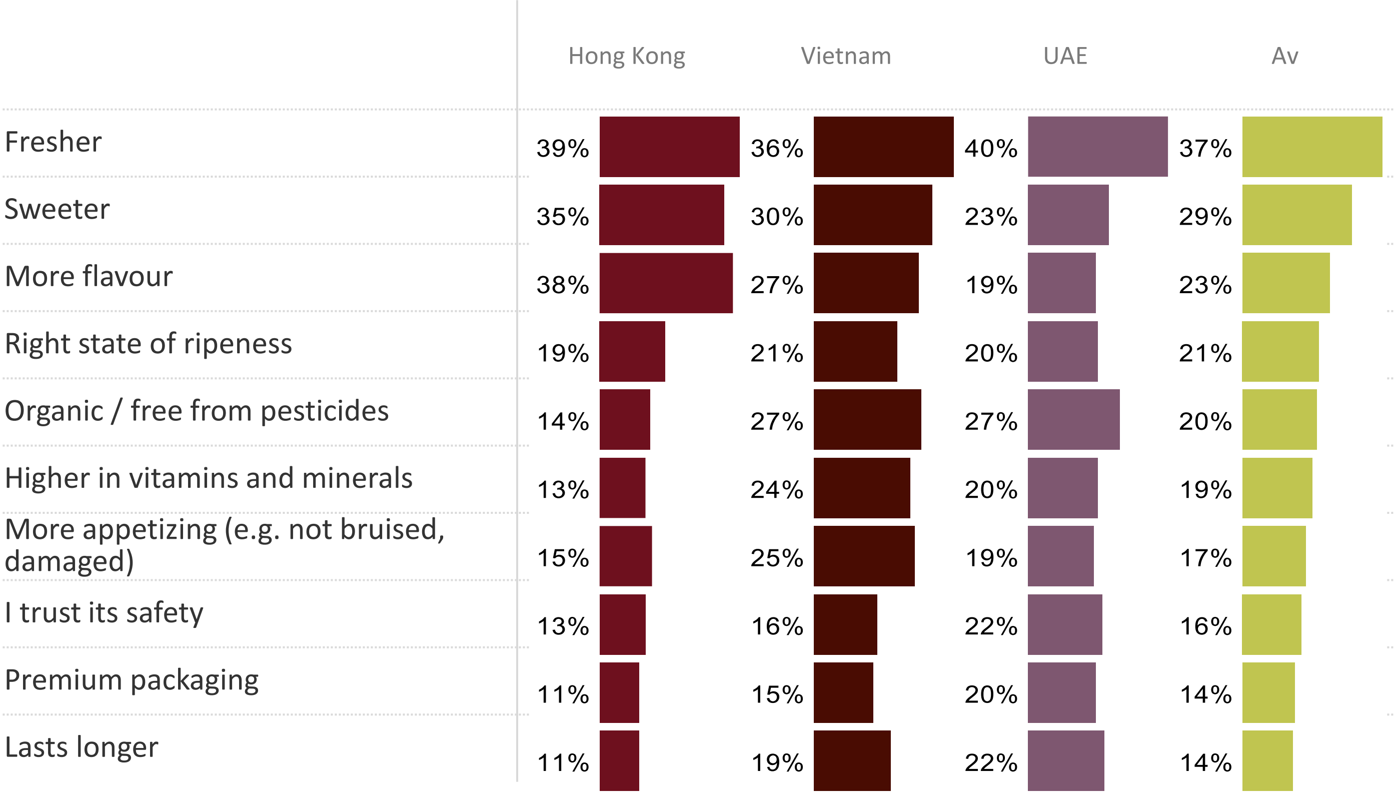
When it comes to the premium opportunity, consumers are looking for Cherries that are fresher, sweeter, have more flavour and are free of pesticides

38%	29%	28%	23%
of people in priority markets are looking for premium Cherries that are	of people in priority markets are looking for premium Cherries that are	of people in priority markets are looking for premium Cherries that have	of people in priority markets are looking for premium Cherries that are
Fresher	Sweeter	More Flavour	Free from Pesticides

Premium quality Cherries are characterised by freshness and sweetness and in Vietnam and UAE, organic / free from pesticides

Cherry

What does premium quality mean to you?



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N=	292	300	295	295	305	301	297	221	294	295	293	295	40

Hort Innovation

Price is the biggest barrier to overcome with cherry consumption, followed by bruising easily and poor quality.

Grapes and strawberries are considered worthy substitutes

Barriers to Consumption

$ Price	Bruise Easily	Poor Quality
38% (priority market average)	19% (priority market average)	15% (priority market average)

Leading Substitutes

Table Grapes	Apples	Strawberry
32% (priority market average)	32% (priority market average)	30% (priority market average)

Price is a key barrier across priority markets, along with bruises easily in Vietnam

Cherry

What are the reasons you may not choose?

	Hong Kong	Vietnam	UAE	13 Market Average
It is too expensive	49%	32%	32%	41%
It bruises easily	16%	27%	15%	13%
Quality is often poor	14%	15%	17%	12%
There are more exciting alternatives	6%	14%	14%	12%
It goes off too quickly / it does not last	13%	15%	16%	11%
It will not fill me up	5%	12%	15%	10%
It contains too much sugar	10%	11%	12%	9%
Not enough people in my household like it/them	3%	11%	13%	8%
They are never in the right state of ripeness when sold in shops	10%	8%	7%	8%
It is too messy to eat	4%	8%	7%	7%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	295	295	305	301	297	221	294	295	293	295	40

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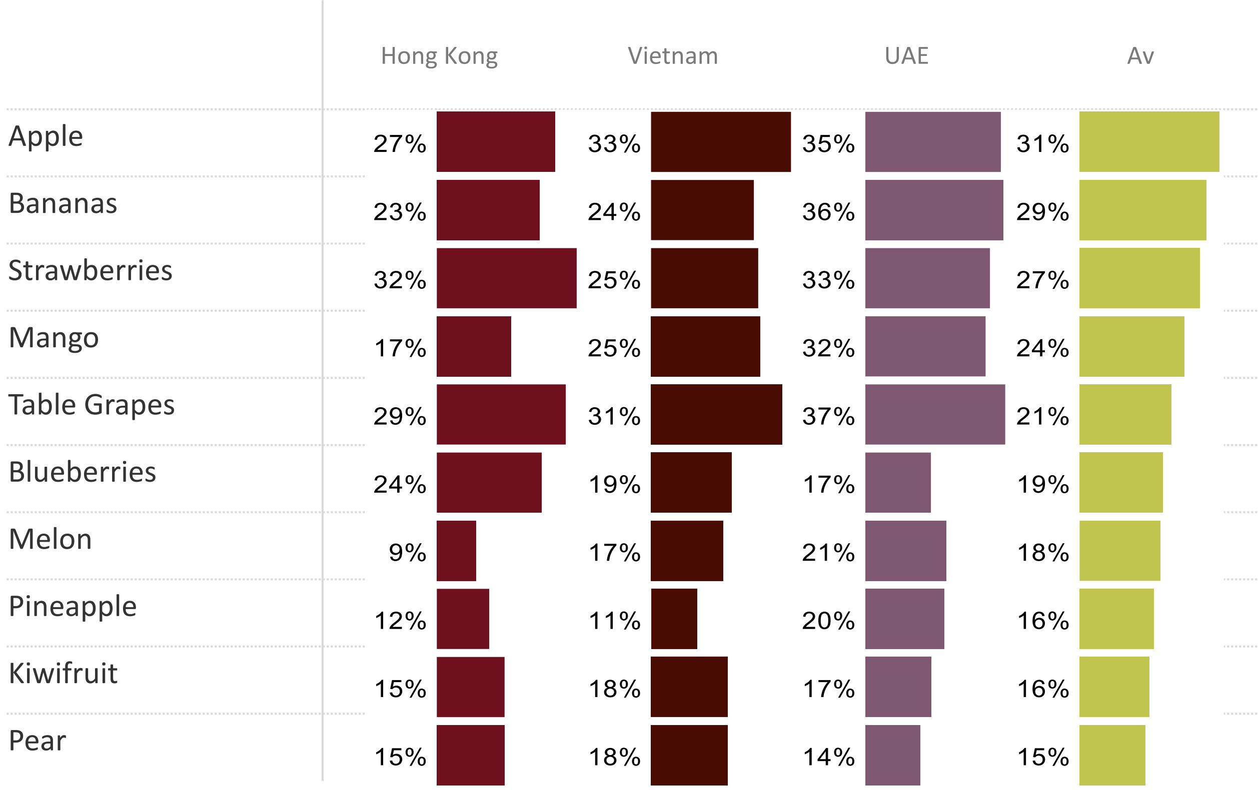
Apples and Table Grapes are key substitutes, along with Strawberries in Hong Kong

Cherry

What else would you typically consider having instead?



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N=	292	300	295	295	305	301	297	221	294	295	293	295	40

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Recommendation: How to drive export growth in Australian Cherries

1. Focus on Strategic Priority Markets

Focus on markets where consumers are **willing to pay a premium** for quality Cherries (ie. **Hong Kong, UAE and Vietnam**). Leverage already **high appeal for Australian Cherries in Hong Kong and Vietnam**, and **improve appeal in UAE** to drive incremental growth in Australian Cherry exports.

2. Deliver Core Consumer Needs

Deliver the core consumer needs across priority markets with Cherries that have a **refreshing taste**, and are an **indulgence that are good for sharing**. Ensure Cherries are at or above par for being **sweet, fresh and light, that serve as a quick and easy snack or dessert.**

3. Leverage Premium Advantage

Maximise the premium opportunity by delivering Cherries that are fresher, sweeter, more flavourful, and are free of pesticides.

4. Reduce Consumption Barriers

Address perceptions that Cherries are **too expensive, bruise easily** and **improve quality issues**, to minimise consumer drift to close substitutes like Table Grapes, Apples, and Strawberries**.**

'Where to Play' ← *'How to Win'* →

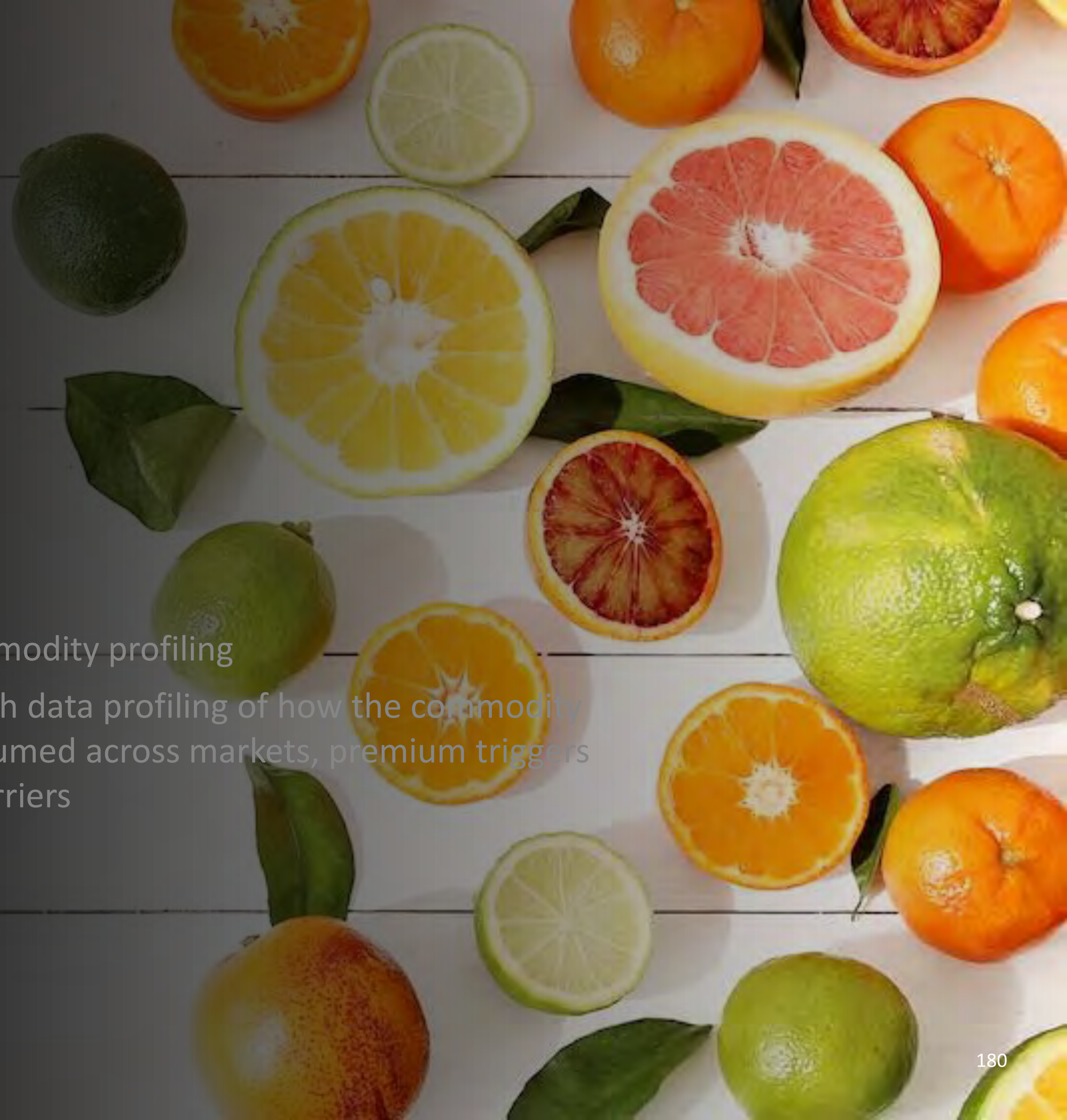
KANTAR

3.5

Citrus fruits

i. Market prioritisation
Leverage the strategic framework to prioritize markets based on consumer behaviour, perception and market access

ii. Commodity profiling
In-depth data profiling of how the commodity is consumed across markets, premium triggers and barriers



Hort Innovation

4 key considerations when interpreting the outputs of the Market Prioritisation

1. No Existing Technical Market Access

2. Markets with Existing Trade

3. Premium Opportunities

4. Focus of Investment

1. No Existing Technical Market Access

Existing technical market access for a commodity was **intentionally NOT included** in the evaluation of addressability

Rationale:

- This project was designed to identify attractive and addressable **future** growth geographies therefore the analysis was not restricted by current arrangements
- This research is intended to **support and inform industry** decisions regarding the progress of any potential future or ongoing market access or market improvement request

2. Markets with Existing Trade

While the addressability calculation includes data on general market access and trade, it intentionally does not include whether Australia currently trades in a particular commodity

Rationale:

- The objective of this analysis is to provide an objective assessment of whether a market is attractive and addressable independent of current arrangements
  - If a market that we are currently trading with for a particularly commodity is shown NOT to be a 'Strategic Priority', this does NOT mean that we should consider withdrawing from this market.
  - However, we recommend re-evaluating the relative focus of investment in this market, and consider other markets when looking for **future** growth opportunities

3. Premium Opportunity

In evaluating attractive and addressable export markets, we have intentionally used data that shows where premium opportunities can be found

Rationale:

- The overall objective of this project was to identify **profitable** growth opportunities for commodities in the future, and Australian commodities will have more chance of growing profitably where they have a better chance for commanding a price premium
  - High commodity penetration in a market has also been used to evaluate attractiveness, but this analysis favours markets where there is a larger opportunity for Australian products to command a **premium**.

4. Focus of Investment

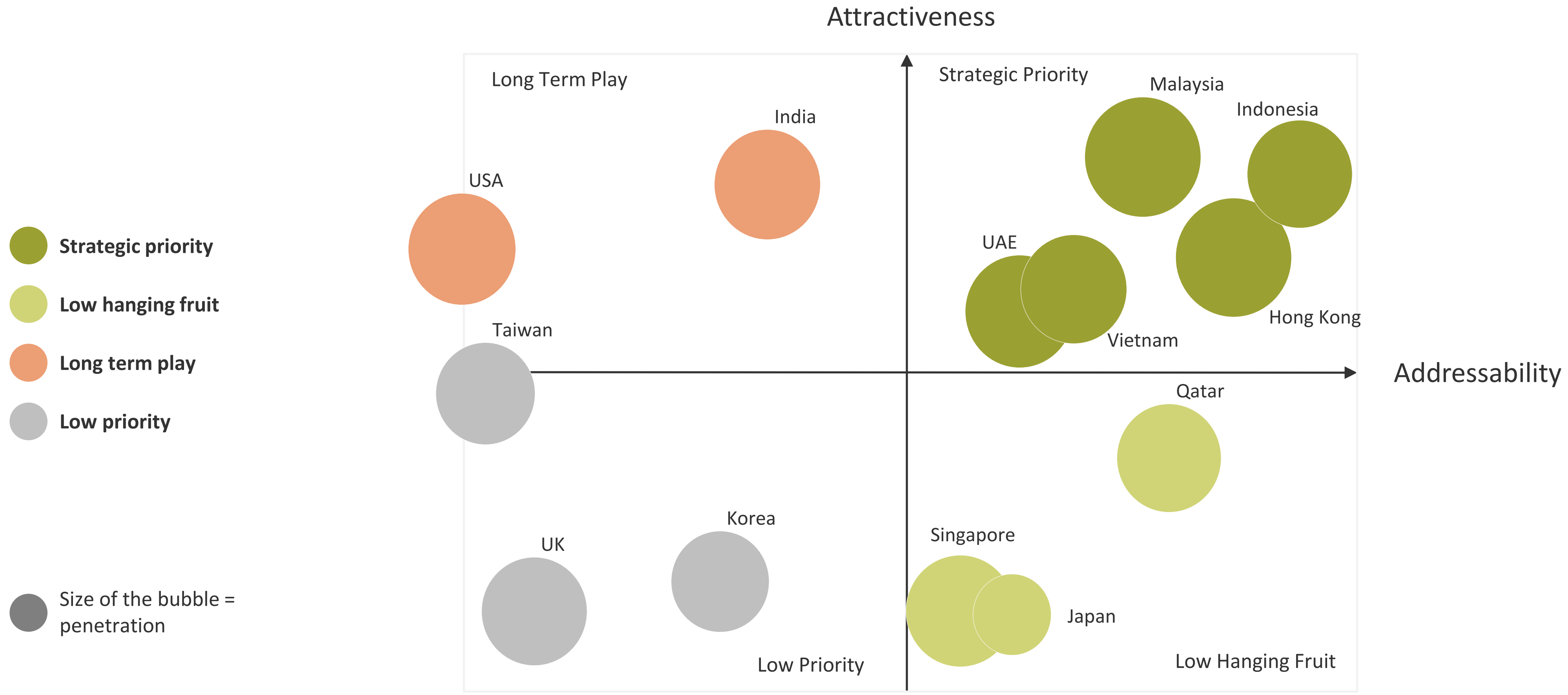
The evaluation and prioritisation of export markets into the 4 quadrants of attractiveness and addressability **is intended to be only one input into decision making** about **where to focus investment**

Rationale:

- The objective of this project was primarily to offer a consumer lens into commodity consumption, to enable export decisions to be informed by more robust consumer data (while still included additional market factor data from previous Deloitte analysis)
  - Export decisions should be made using all available information including the economics of local growers and exporters and this report forms one input into that decision process

We have identified 5 strategic priority markets that represent the most attractive and appealing export opportunity for Australian citrus

Citrus



Source: Kantar HIA International Demand Study 2022, World Bank 2021

Citrus fruits: Summary of Strategic Priorities

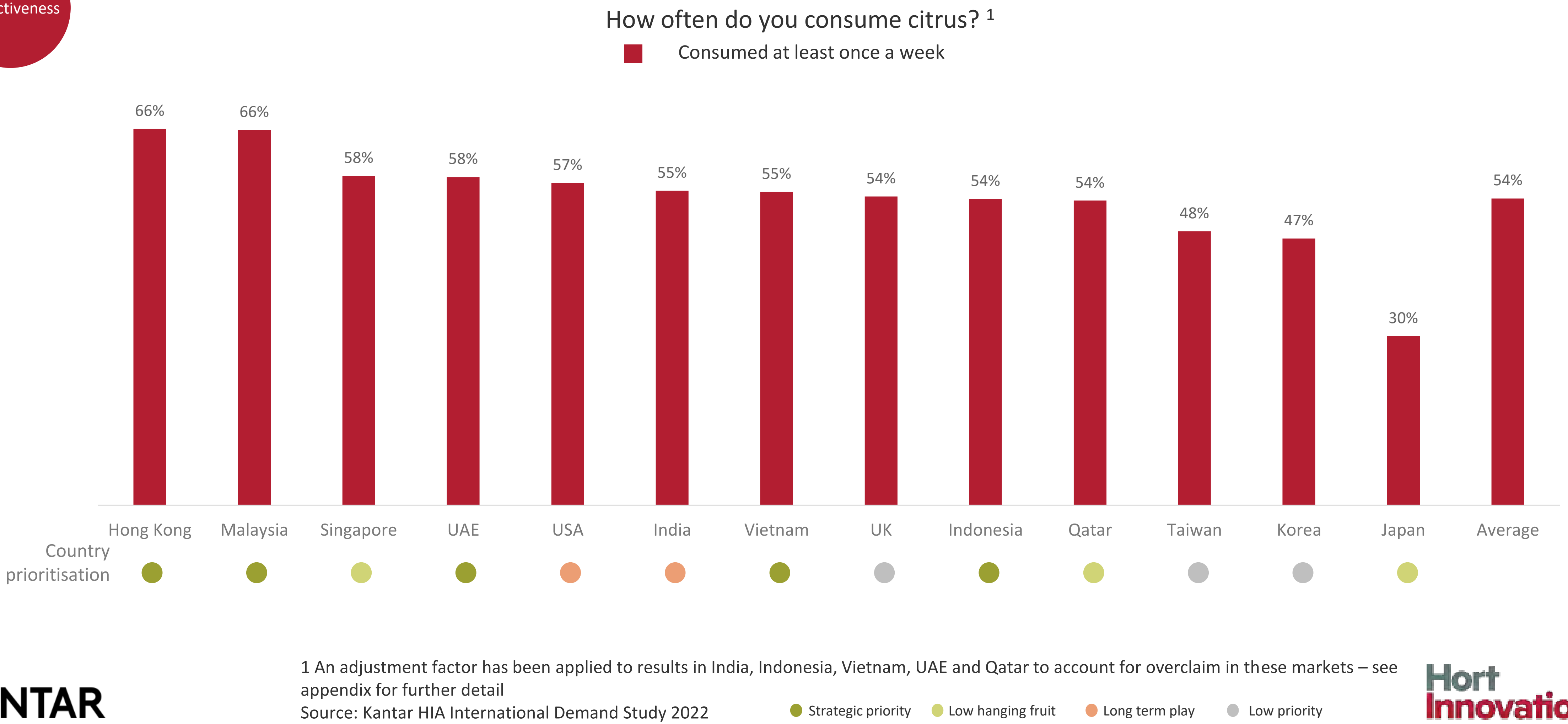
Citrus

	Indonesia	Hong Kong	Malaysia	Vietnam	UAE
STRATEGIC IMPLICATIONS	Indonesia represents a strong strategic priority for citrus export given the high penetration, high Australian appeal and premium potential	Hong Kong is a similarly attractive opportunity, but given its high penetration and attractive high income per-capita	Malaysia is a third strong export opportunity because citrus is highly penetrated and other attractiveness metrics rank strongly	Vietnam is an opportunity for export given metrics that mostly align with the average across markets, but are boosted by a high willingness to spend on premium citrus	The UAE is an attractiveness opportunity given consumers' greater propensity to spend in this market. Strong penetration and moderate Australia/premium appeal boosts the opportunity
ATTRACTIVENESS	• Moderate penetration vs. other markets (still 1 in 2 consume weekly) • High claimed willingness to spend on premium citrus	• Very high penetration of citrus fruits (#1 ranking country, 2 in 3 consume weekly) • Moderate claimed willingness to spend on premium	• Very high penetration of citrus fruits (#2 ranking country, 2 in 3 consume weekly) • High claimed willingness to spend on premium	• Moderate penetration • Very high (#2 ranking) claimed willingness to spend on premium	• Strong penetration • Moderate claimed willingness to spend on premium
ADDRESSABILITY	• #1 ranked country for Australian citrus appeal • High willingness to pay a premium for citrus in Indonesia vs. other commodities	• Moderate Australian appeal • High willingness to pay a premium for citrus in Hong Kong vs. other commodities	• Relatively high Australian appeal (#3 ranking) • Low premium appeal vs. other commodities	• Moderate Australian appeal, in line with average • Moderate premium appeal vs. other commodities	• Moderate Australian appeal, in line with average • Moderate premium appeal vs. other commodities

Citrus fruits are widely consumed. Two thirds of people in several markets (including Hong Kong & Malaysia) consume them weekly

Citrus

Attractiveness



1 An adjustment factor has been applied to results in India, Indonesia, Vietnam, UAE and Qatar to account for overclaim in these markets – see appendix for further detail
Source: Kantar HIA International Demand Study 2022

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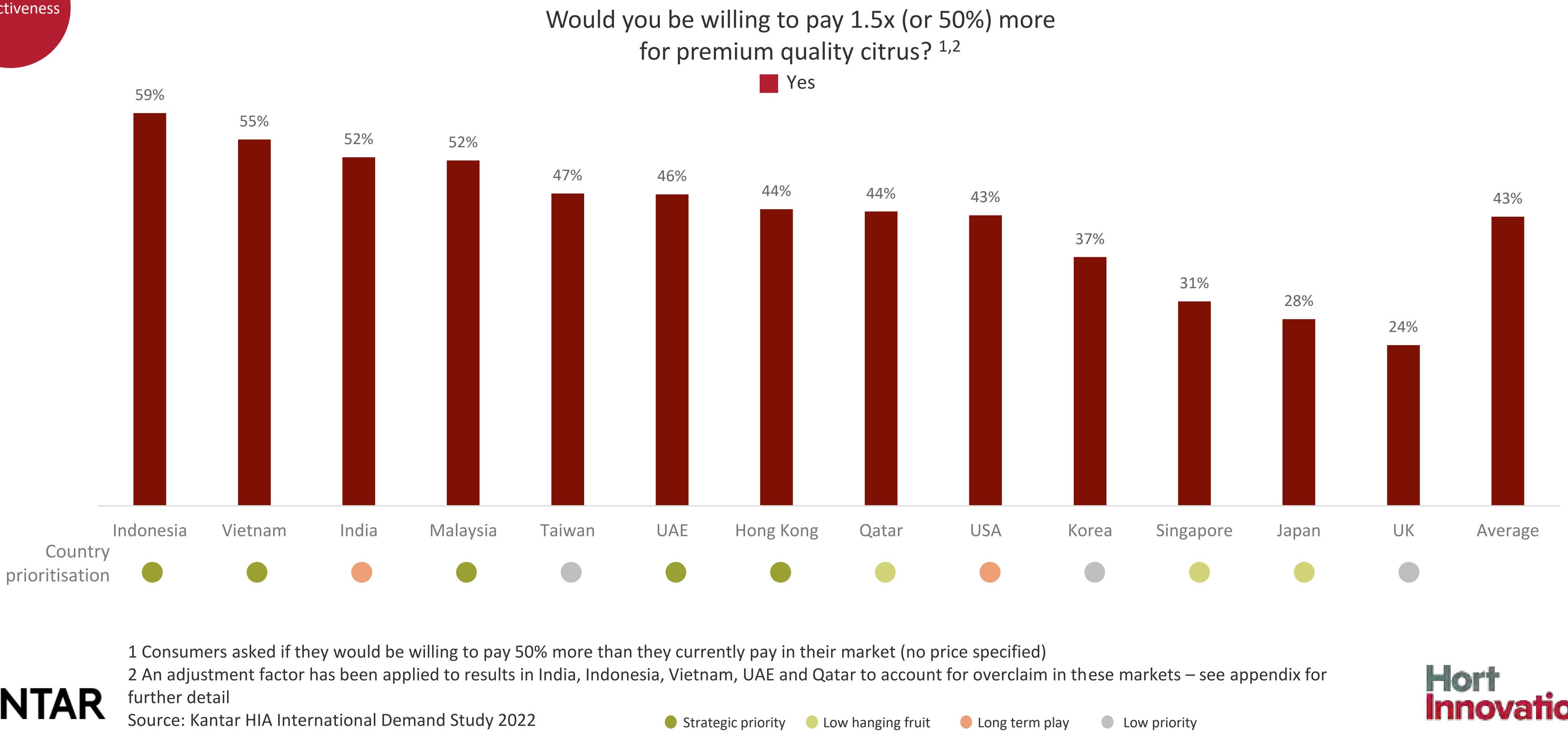
In some markets, citrus fruits do have the potential to command a premium price

Citrus

Attractiveness



1 Consumers asked if they would be willing to pay 50% more than they currently pay in their market (no price specified)
2 An adjustment factor has been applied to results in India, Indonesia, Vietnam, UAE and Qatar to account for overclaim in these markets – see appendix for further detail
Source: Kantar HIA International Demand Study 2022

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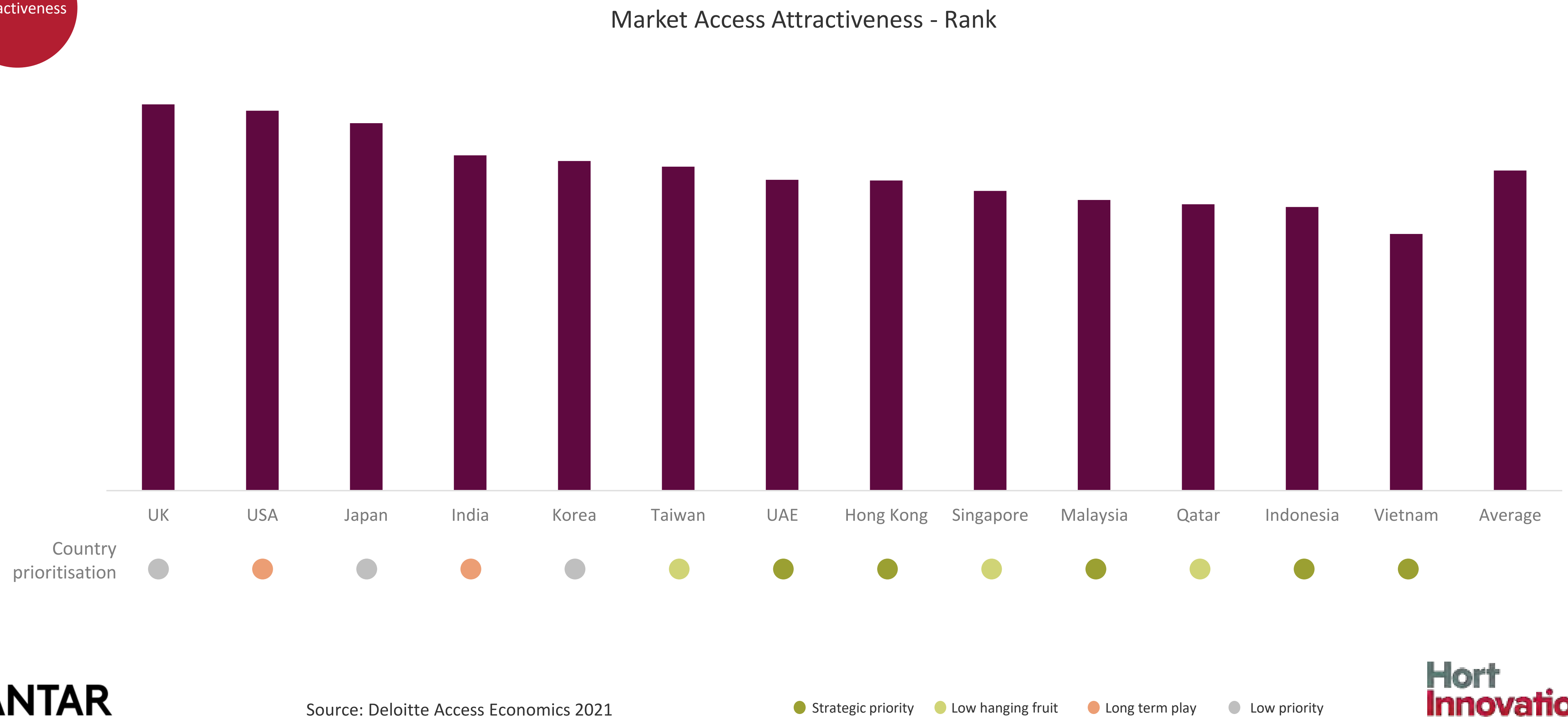
Although all markets are attractive, more affluent markets with larger populations rank more highly

Citrus

Attractiveness

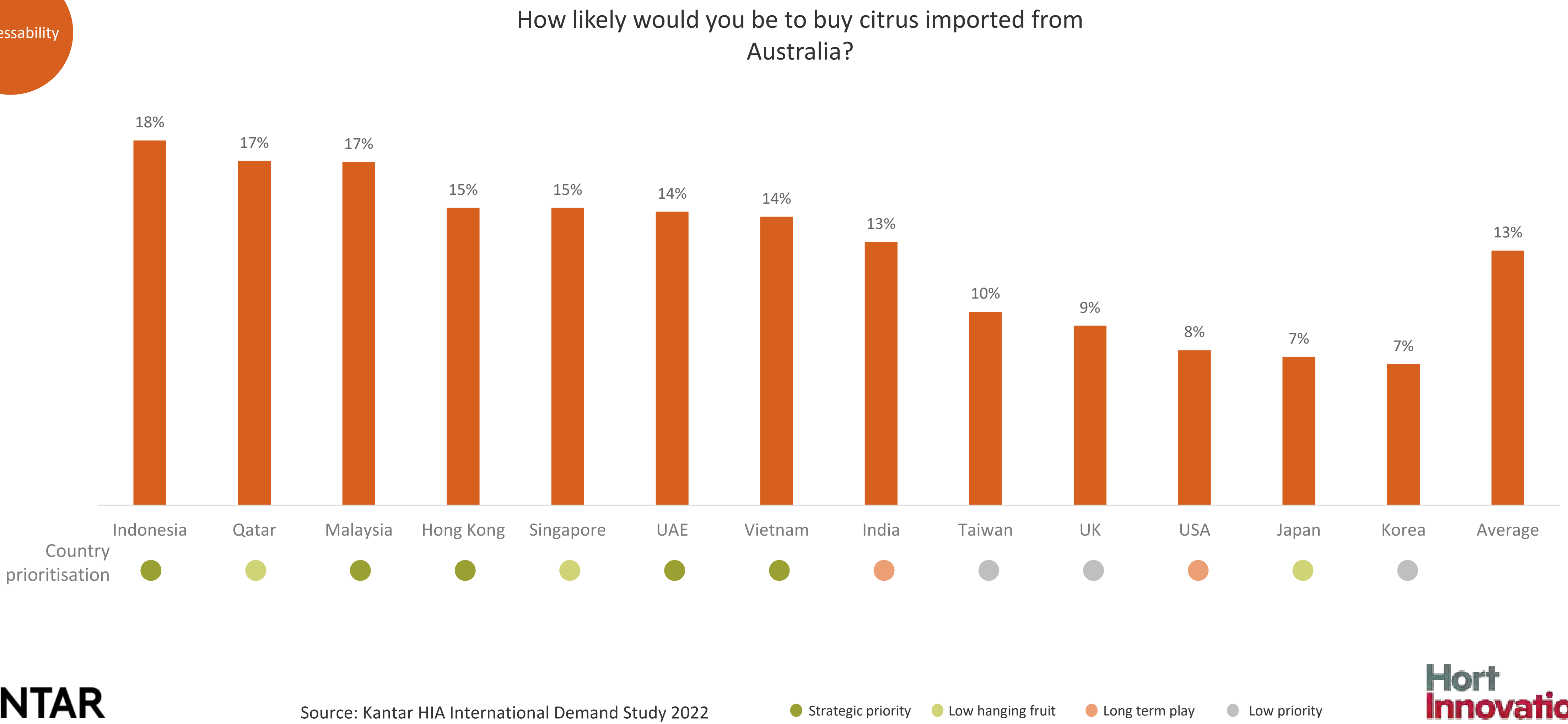


Source: Deloitte Access Economics 2021

The Australian appeal of citrus fruits is relatively strong, especially in Indonesia, Qatar and Malaysia

Citrus

Addressability



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Source: Kantar HIA International Demand Study 2022

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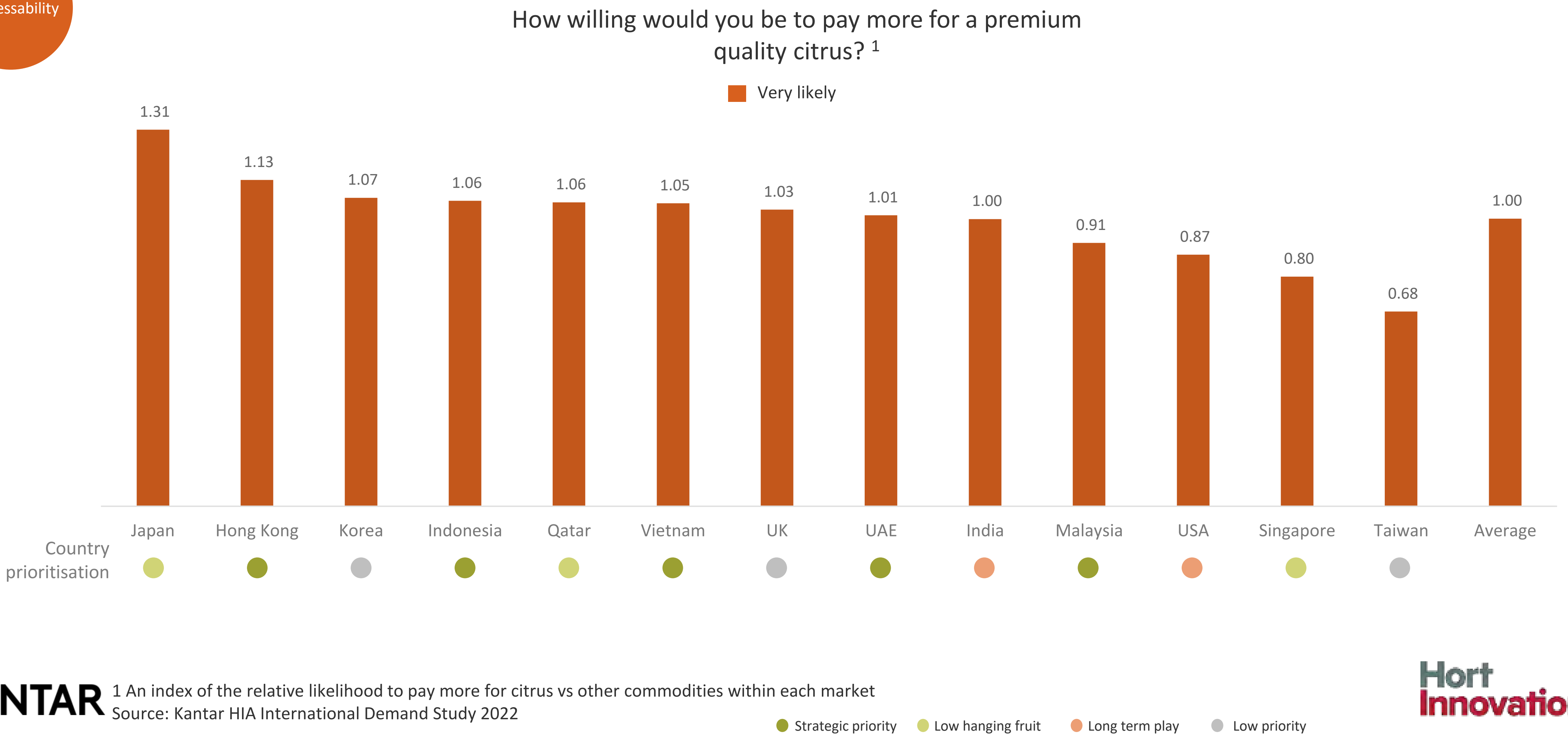
Relative desire for premium vs. other commodities is very strong in Japan, Hong Kong and Korea

Citrus

Addressability



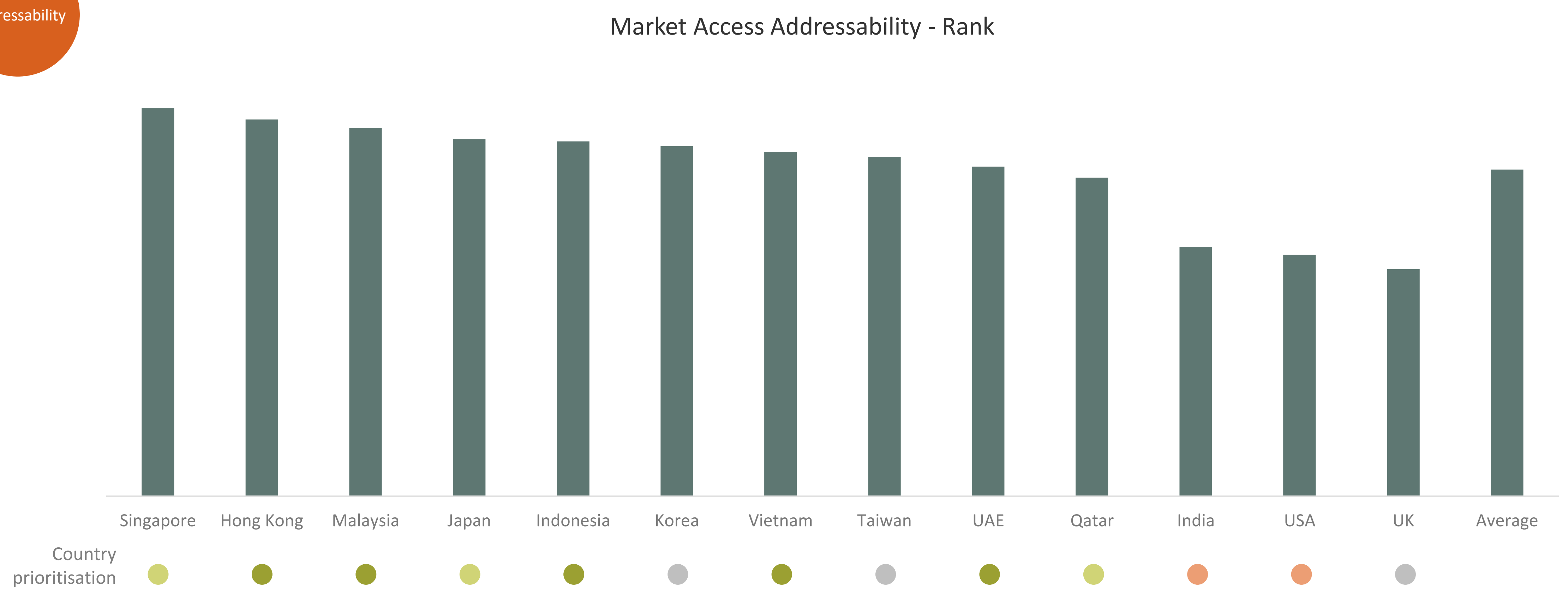
1 An index of the relative likelihood to pay more for citrus vs other commodities within each market

Source: Kantar HIA International Demand Study 2022

Some markets rank as more addressable due to the ease of trade, market risk and value chain competitiveness

Citrus

Addressability



Source: Deloitte Access Economics 2021

Strategic priority Low hanging fruit Long term play Low priority

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3.5
Citrus fruits

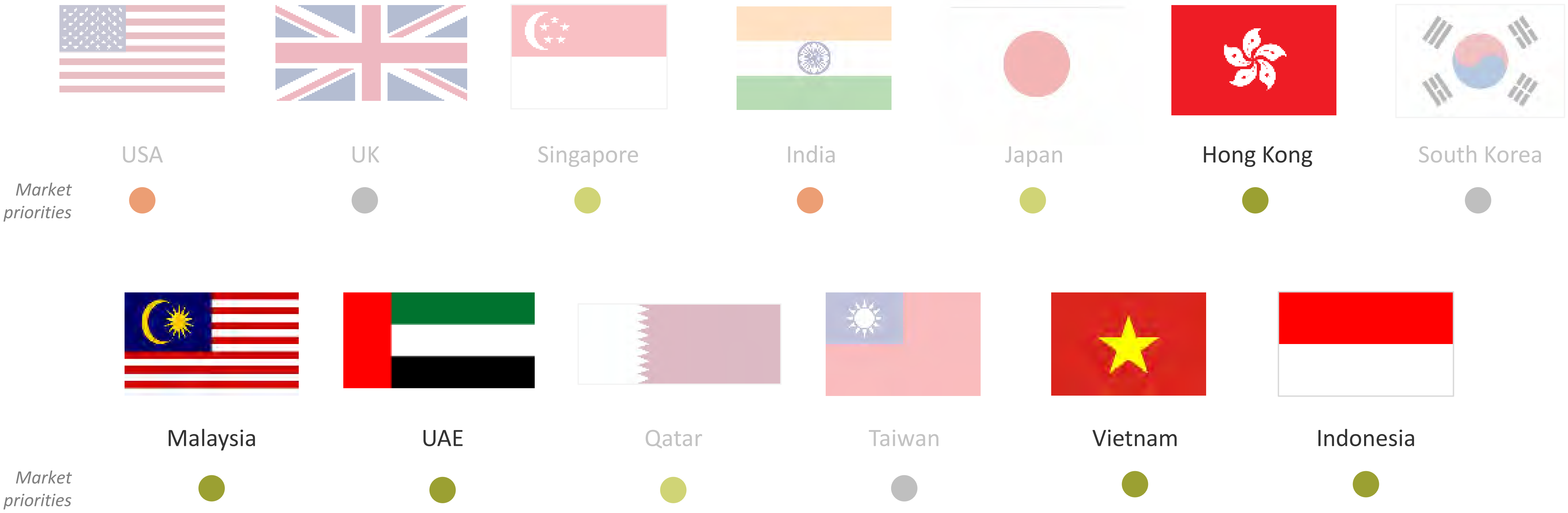
i. Market prioritisation
Leverage the strategic framework to prioritize markets based on consumer behaviour, perception and market access

ii. Commodity profiling
In-depth data profiling of how the commodity is consumed across markets, premium triggers and barriers

Hort Innovation

Citrus

The prioritisation revealed x5 markets ripe for Citrus export.
The next section will deep dive into Citrus consumption across markets



Strategic priority · Low hanging fruit · Long term play · Low priority

Citrus Fruits consumption snapshot

Citrus

	Malaysia	Hong Kong	Vietnam	Indonesia	UAE
HOW OFTEN (P1W pen.)	66%	66%	55%	54%	58%
WHEN	Snack Dinner	Dinner	Lunch Dinner	Lunch Snack	Lunch Dinner
HOW	Fresh on its own	Fresh on its own	Fresh on its own As part of a snack	Fresh on its own	Fresh on its own
WHY	Tasty Quick & Easy	Tasty Quick & Easy	Tasty Indulgence	Tasty Quick & Easy	Tasty Quick & Easy Health & Nutrition
WHERE	At home	At home	At Home	At home	At home
WHO WITH	With Family	With Family	With Family	With Family	With Family

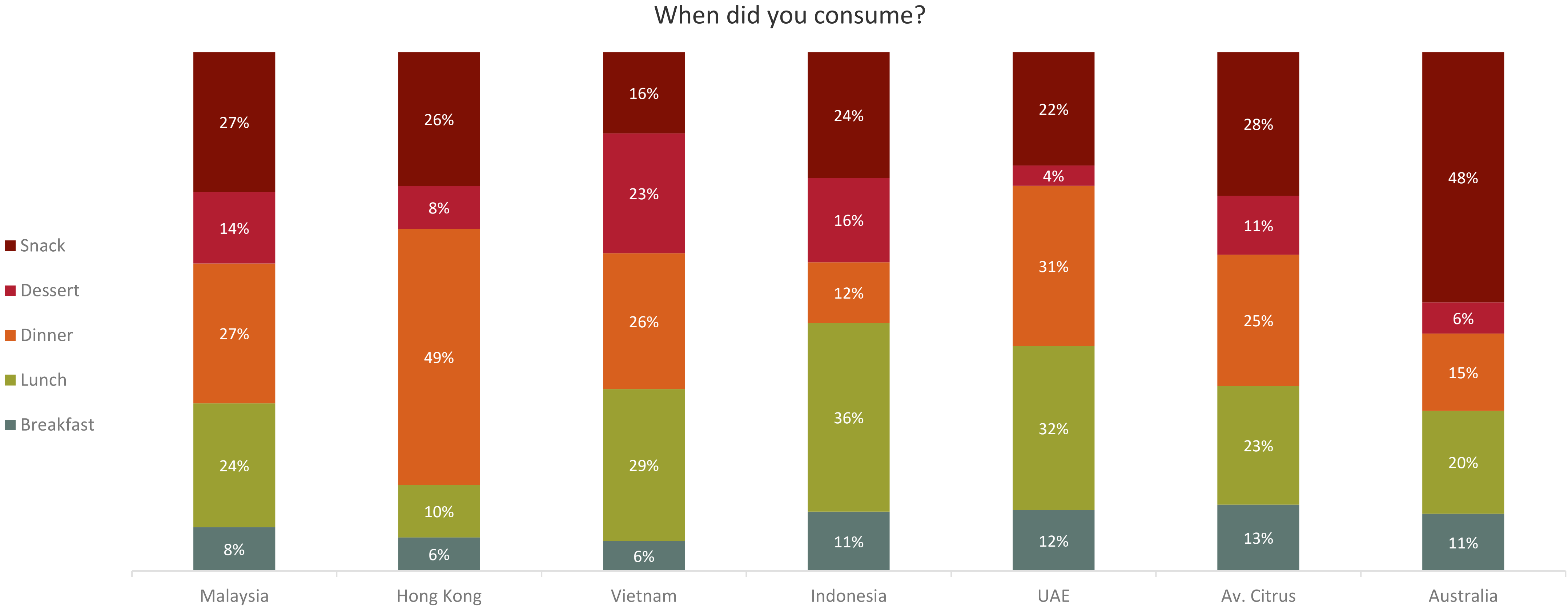
Source: Kantar HIA International Demand Study 2022

Citrus Fruits: Strategic Imperatives

	Malaysia	Hong Kong	Vietnam	Indonesia	UAE
CONSUMER PREFERENCES	As a tasty, quick & easy snack or dinner, fresh on its own, at home with family	As a tasty, quick & easy dinner, fresh on its own, at home with family	As a tasty and indulgent lunch or dinner, fresh on its own or as part of a snack, at home with family	As a tasty, quick & easy lunch or snack, fresh on its own, at home with family	As a tasty, easy and healthy lunch or dinner, fresh on its own, at home with family
NEEDS TO SATISFY	Tasty Quick & Easy	Tasty Quick & Easy	Tasty Indulgence	Tasty Quick & Easy	Tasty Quick & Easy Health & Nutrition
FUNCTIONAL ATTRIBUTES	Refreshing Taste Fresh & Light	Aids digestion, Contains Fibre	Refreshing Taste Sweet Aids digestion	Fresh & Light Refreshing taste	Refreshing taste Fresh & Light
PREMIUM OPPORTUNITY	Fresher High in vitamins and minerals	Fresher Sweeter More flavour	Fresher Sweeter	Fresher High in vitamins and minerals	Fresher High in vitamins and minerals
BARRIERS TO OVERCOME	Too expensive	Too messy	Bruises easily	Exciting alternatives Poor quality Too expensive	Too expensive Poor quality
KEY SUBSTITUTES	Apples Mangoes	Apples Bananas	Bananas Mangoes	Apple Bananas	Fruiting Vegetables Nuts and Seeds

Citrus is mainly consumed with lunch or dinner across priority markets. Dessert is also a key occasion in Vietnam

Citrus



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Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	295	295	305	299	297	217	294	294	289	307	41

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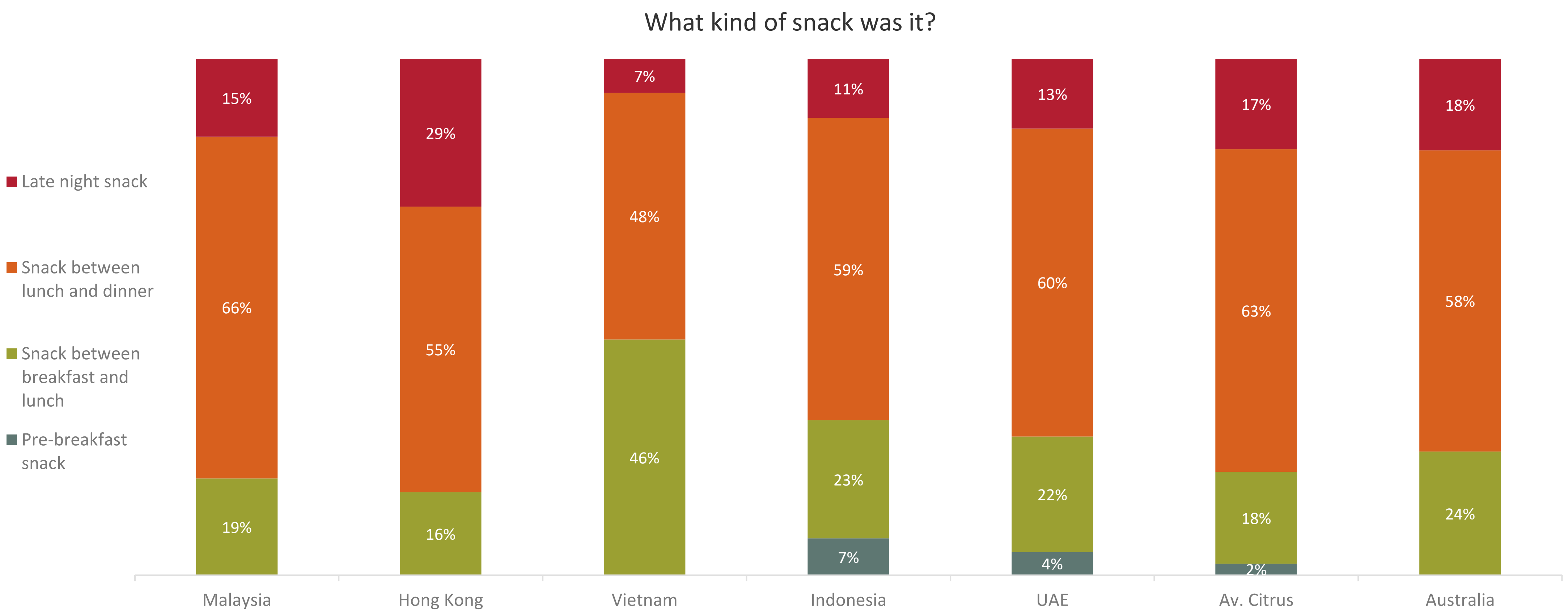
When consumed as a snack, Citrus is typically consumed between lunch and dinner or between breakfast and lunch in Vietnam

Citrus



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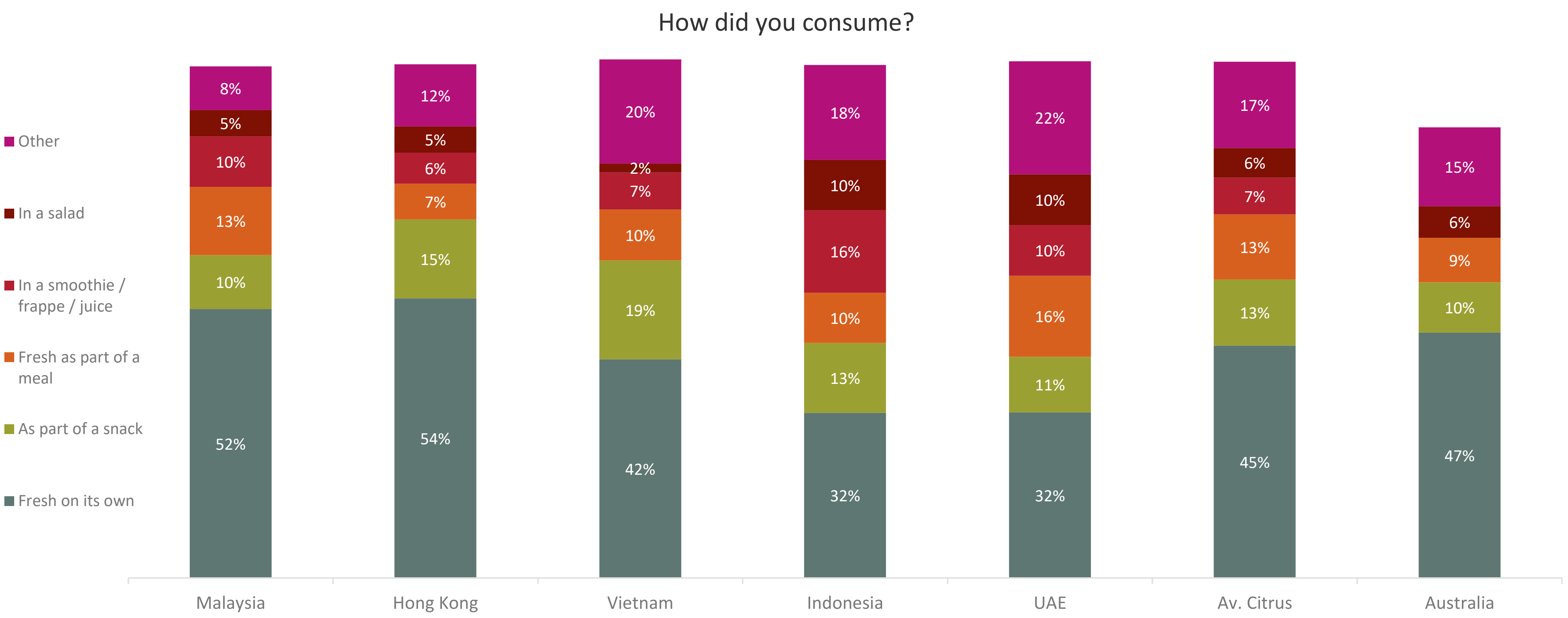
Source: Kantar HIA International Demand Study 2023

Hort Innovation

Citrus is usually consumed on its own, especially in Malaysia and Hong Kong

Citrus



'Other' = As an ingredient in cooking, As a topping (e.g., on yoghurt, as a garnish etc.), Cooked on its own, As an ingredient in baking, As part of an alcoholic drink e.g. cocktail, To make baby food / puree, For decoration / show only and Don't know

Source: Kantar HIA International Demand Study 2023

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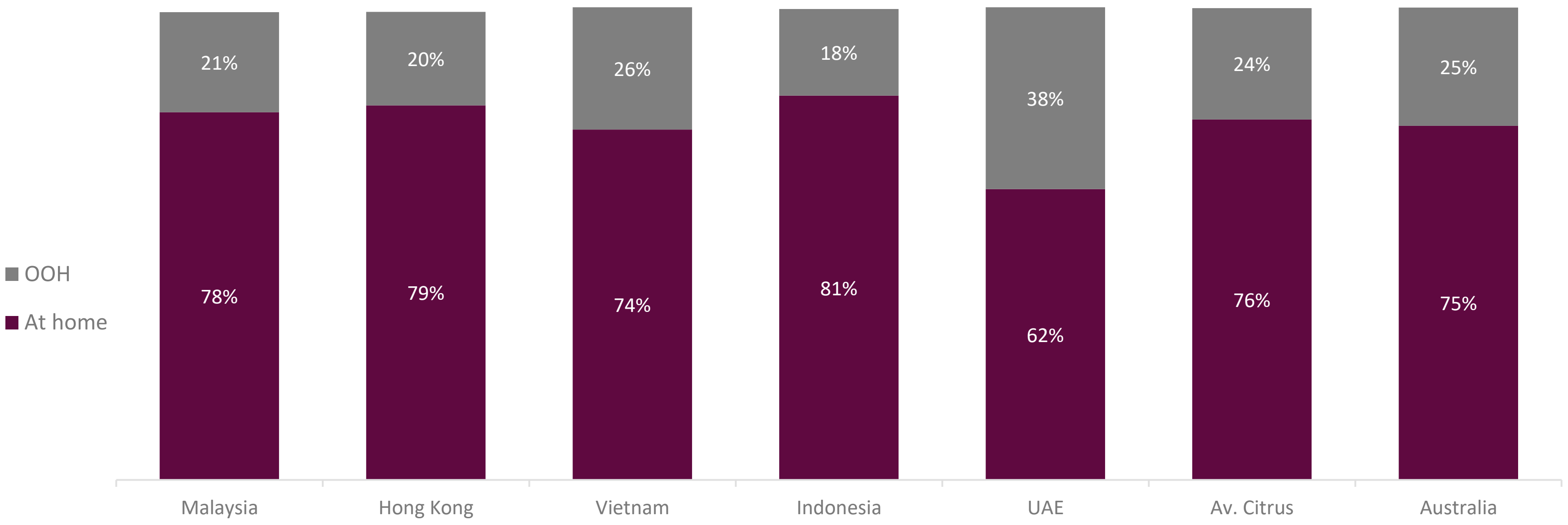
Citrus

Most people consume Citrus at home. UAE skews more out of home

Where were you?

76%

Of consumption of citrus fruits is in the home, this varies only slightly by market



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Source: Kantar HIA International Demand Study 2023

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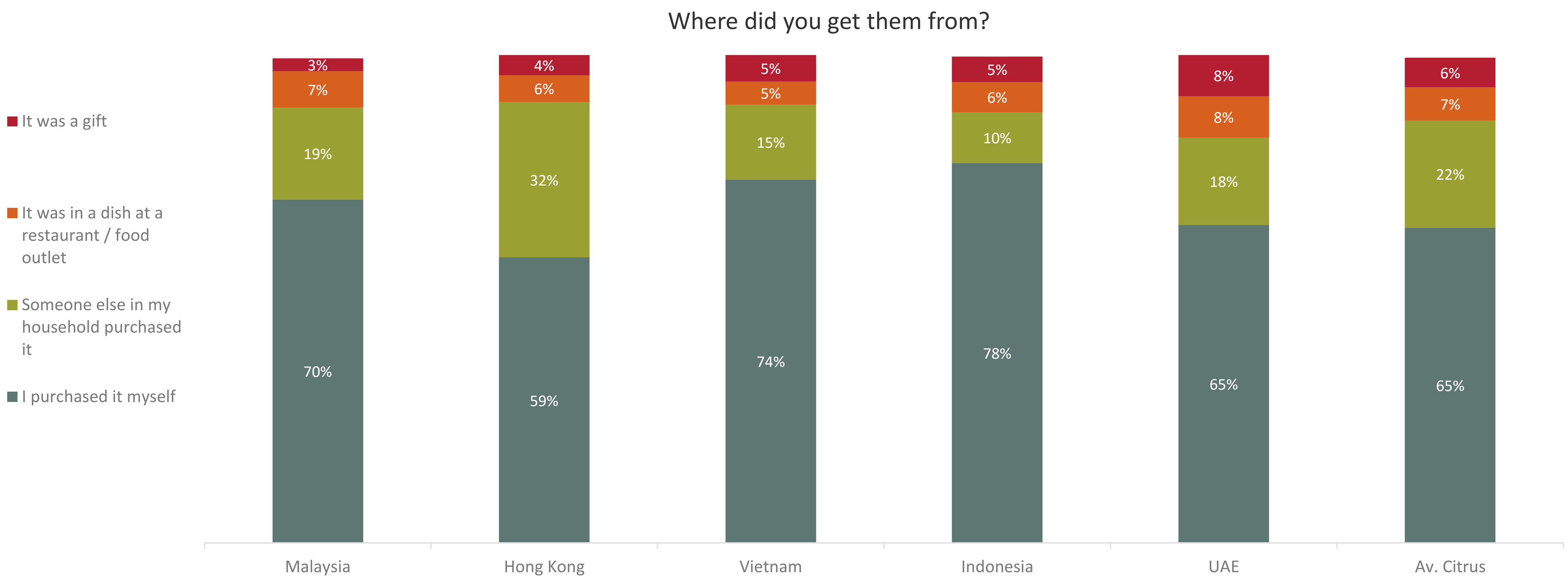
Hort Innovation

Consumer usually purchase Citrus themselves

Citrus



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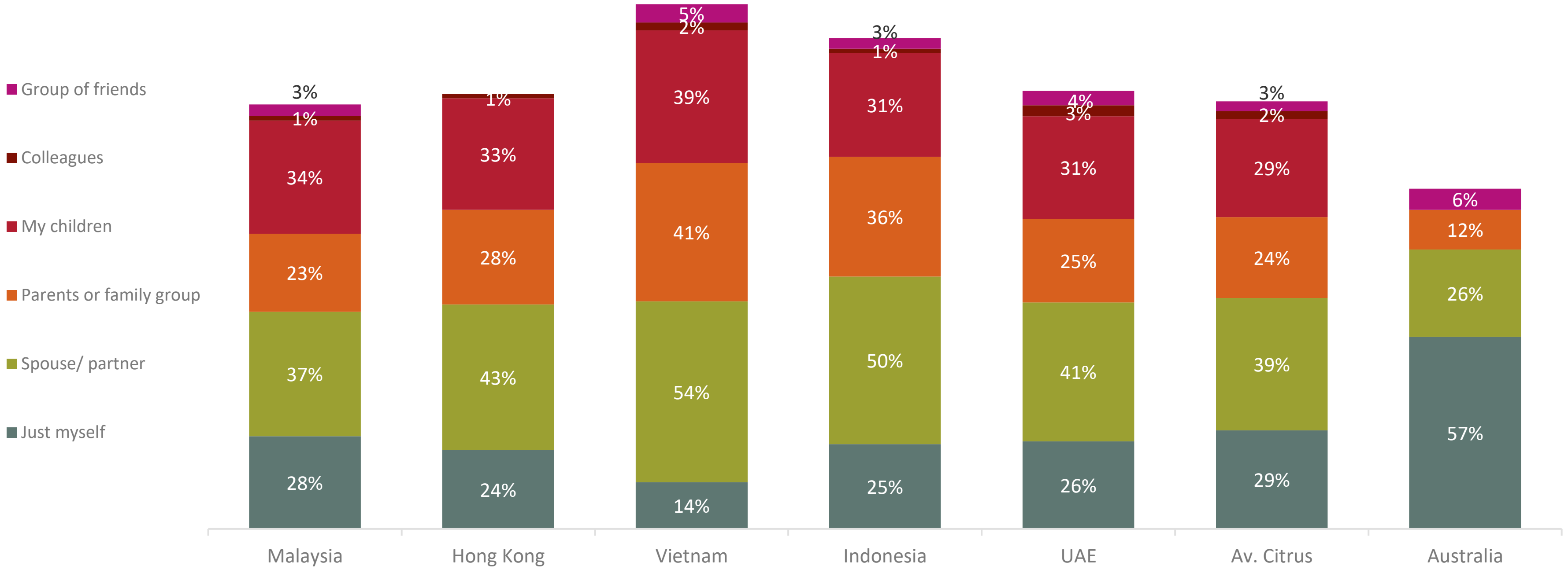
Citrus is most often consumed with a spouse or partner or with a broader family group

Citrus

Who were you with?

39%

Of consumption of citrus fruits (on average) is with a spouse/partner.



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There is a range of reasons why people choose to eat different fruits & vegetables. There are
6 universal consumer needs pillars that drive this choice for consumers globally

The 6 needs pillars are universal across commodities and global markets

Tasty

All about: Taste, Refreshment, and Enjoyment

Quick & Easy

All about: Convenience Simplicity, and Ease

Healthy & Nutritious

All about: Guilt-free, Nourishing and Sensible

Indulgence

All about: Comfort, Relaxation and Self Care

Physical & Mental Energy

All about: Energy, Uplift, and Reinvigoration

Connection

All about: Bonding, Celebration and Creating Memories

In priority markets, the most important reasons why people choose to consume Citrus Fruits are for something tasty, quick & easy and healthy & nutritious

62%

of people in priority markets consume Citrus Fruits for something

Tasty

47%

of people in priority markets consume Citrus Fruits for something

Quick & Easy

45%

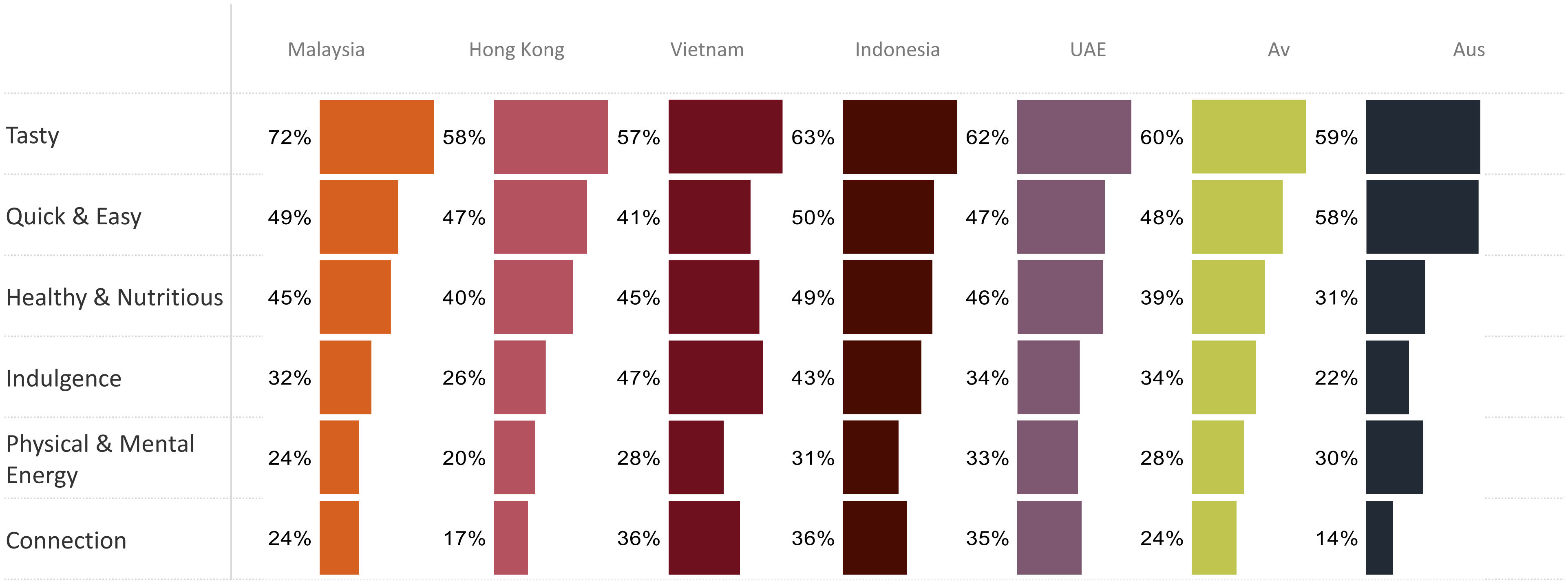
of people in priority markets consume Citrus Fruits for something

Healthy & Nutritious

Citrus

Taste is the most important consumption driver across all markets, followed by Quick & Easy or Indulgence in Vietnam

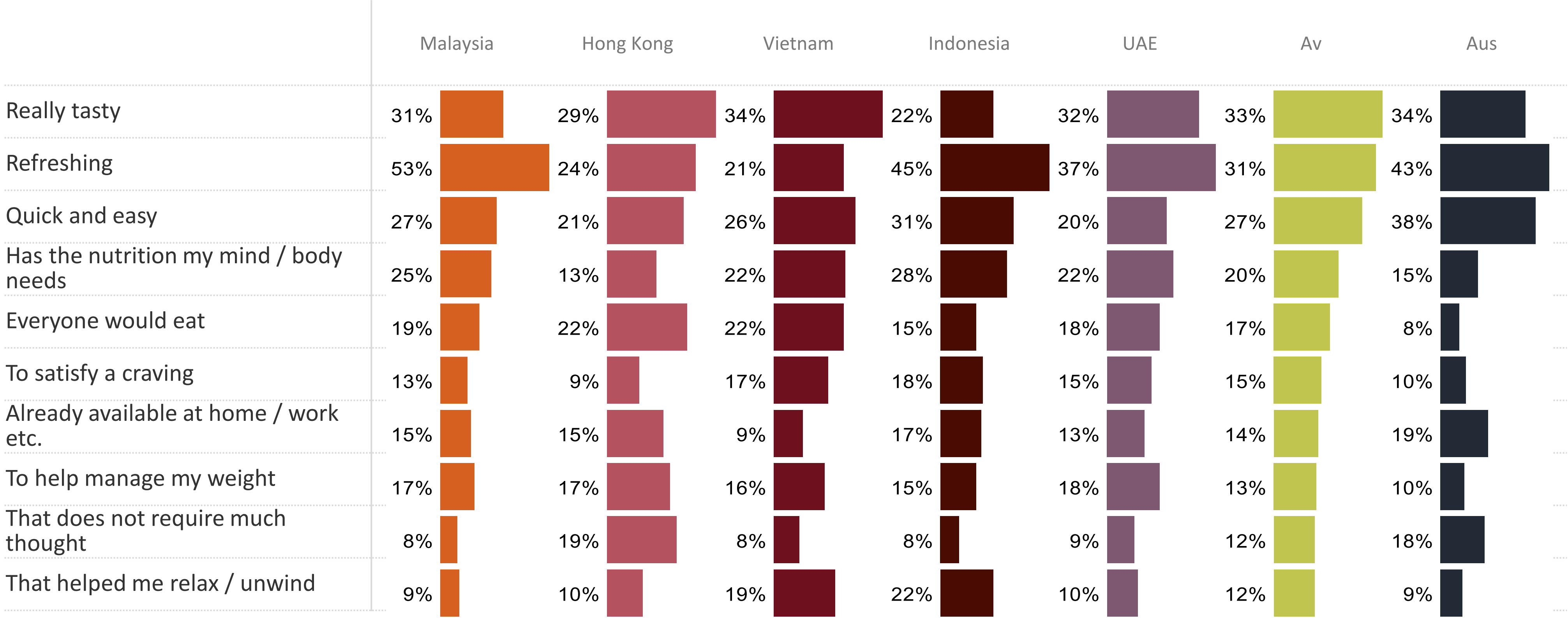
Which were important when choosing to consume?



Citrus

When we investigate in further detail, consumers are looking for ‘really tasty’ in Hong Kong, Vietnam and refreshing in other priority markets

Which were important when choosing to consume?



	Malaysia	Hong Kong	Vietnam	Indonesia	UAE	Av	Aus
Really tasty	31%	29%	34%	22%	32%	33%	34%
Refreshing	53%	24%	21%	45%	37%	31%	43%
Quick and easy	27%	21%	26%	31%	20%	27%	38%
Has the nutrition my mind / body needs	25%	13%	22%	28%	22%	20%	15%
Everyone would eat	19%	22%	22%	15%	18%	17%	8%
To satisfy a craving	13%	9%	17%	18%	15%	15%	10%
Already available at home / work etc.	15%	15%	9%	17%	13%	14%	19%
To help manage my weight	17%	17%	16%	15%	18%	13%	10%
That does not require much thought	8%	19%	8%	8%	9%	12%	18%
That helped me relax / unwind	9%	10%	19%	22%	10%	12%	9%

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More functionally, consumers are looking for Citrus Fruits that are refreshing in taste, sweet while still being light

30%

of people in priority markets are looking for Citrus Fruits that have a

Refreshing taste

24%

of people in priority markets are looking for Citrus Fruits that are

Sweet

25%

of people in priority markets are looking for Citrus Fruits that are

Fresh / Light

Across markets consumers are looking for Citrus that has a refreshing taste, sweet or contains fibre and aides digestion in Hong Kong

Citrus

What were you looking for when you consumed?

	Malaysia	Hong Kong	Vietnam	Indonesia	UAE	Av
Refreshing taste	38%	15%	35%	31%	29%	33%
Sweet	26%	25%	22%	26%	19%	25%
Fresh / Light	27%	18%	20%	36%	25%	24%
Good source of minerals & vitamins / Nutritionally dense	19%	18%	17%	25%	14%	18%
Contains fibre	18%	27%	17%	13%	12%	17%
To aid digestion	16%	29%	22%	15%	19%	16%
Quick / easy to prepare	21%	18%	7%	17%	10%	15%
Rich in anti-oxidants	21%	16%	18%	22%	15%	15%
Tangy	15%	6%	10%	7%	10%	11%
That is good value for money	8%	12%	12%	10%	10%	11%

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Hort Innovation

When it comes to the premium opportunity, consumers are looking for Citrus Fruits that are fresher, sweeter, are higher in vitamins & minerals, and organic

47%

of people in priority markets are looking for premium Citrus Fruits that are

Fresher

33%

of people in priority markets are looking for premium Citrus Fruits that are

Sweeter

31%

of people in priority markets are looking for premium
Citrus Fruits that are

Higher in vitamins & minerals

26%

of people in priority markets are looking for premium Citrus Fruits that are

Organic

Premium Citrus is characterised by fresher and sweeter across priority markets. Hong Kong consumers are also looking for Citrus that has more flavour

Citrus

What does premium quality mean to you?

	Malaysia	Hong Kong	Vietnam	Indonesia	UAE	Av
Fresher	52%	44%	46%	49%	42%	42%
Sweeter	31%	41%	37%	31%	24%	29%
Higher in vitamins and minerals	34%	25%	30%	38%	28%	27%
More flavour	18%	37%	32%	26%	28%	25%
Organic / free from pesticides	26%	16%	27%	37%	25%	23%
Right state of ripeness	19%	17%	30%	26%	24%	22%
I trust its safety	22%	20%	18%	24%	21%	20%
More appetizing (e.g. not bruised, damaged)	19%	15%	31%	22%	16%	17%
Lasts longer	16%	9%	23%	22%	18%	16%
Locally grown / produced in my area	8%	10%	12%	16%	21%	16%

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Hort Innovation

Price is the biggest barrier to overcome with Citrus Fruits consumption, followed by poor quality and bruising easily.

Other fruit and veg are considered worthy substitutes

Barriers to Consumption

Price	Poor Quality	Bruises Easily
23% (priority market average)	18% (priority market average)	17% (priority market average)

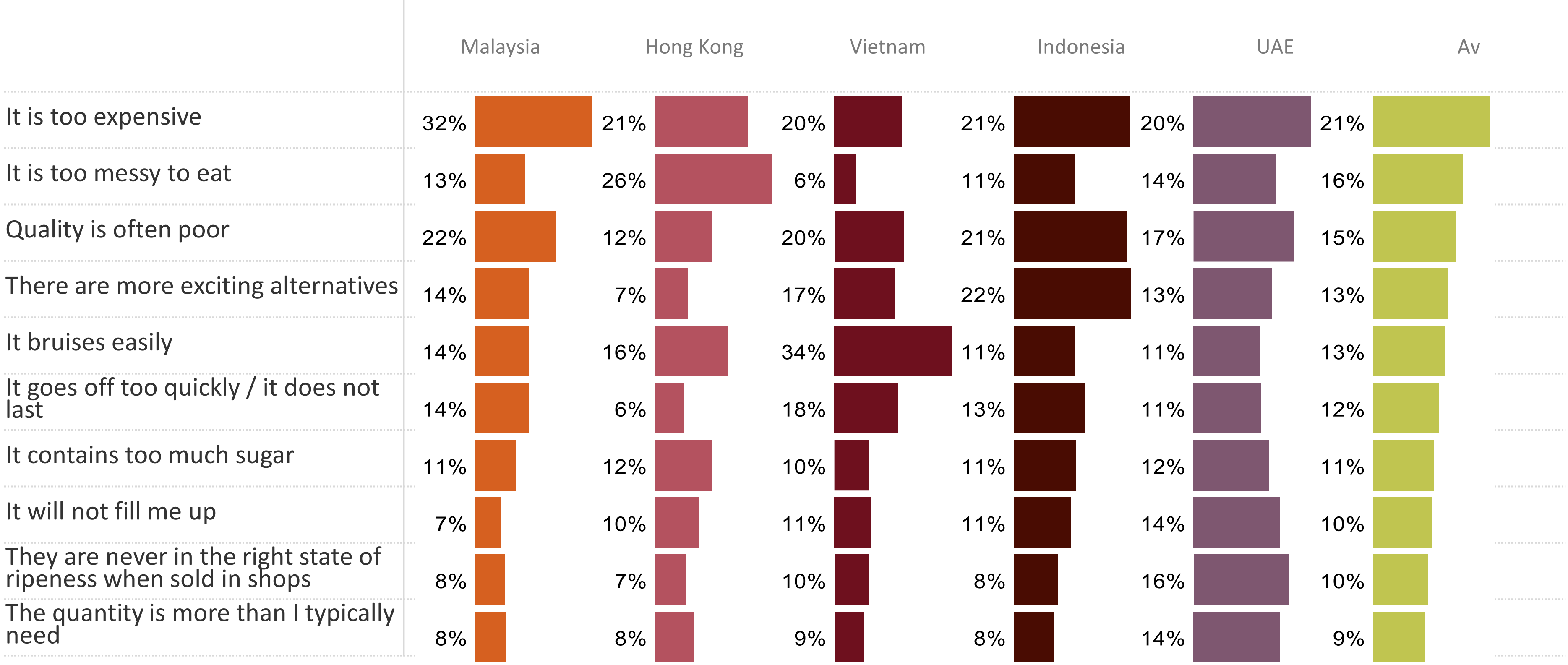
Leading Substitutes

Apples	Bananas	Mango
40% (priority market average)	38% (priority market average)	34% (priority market average)

Citrus

Price is a key barrier across priority markets along with poor quality in Malaysia and Indonesia, messiness in Hong Kong and bruises easily in Vietnam

What are the reasons you may not choose?



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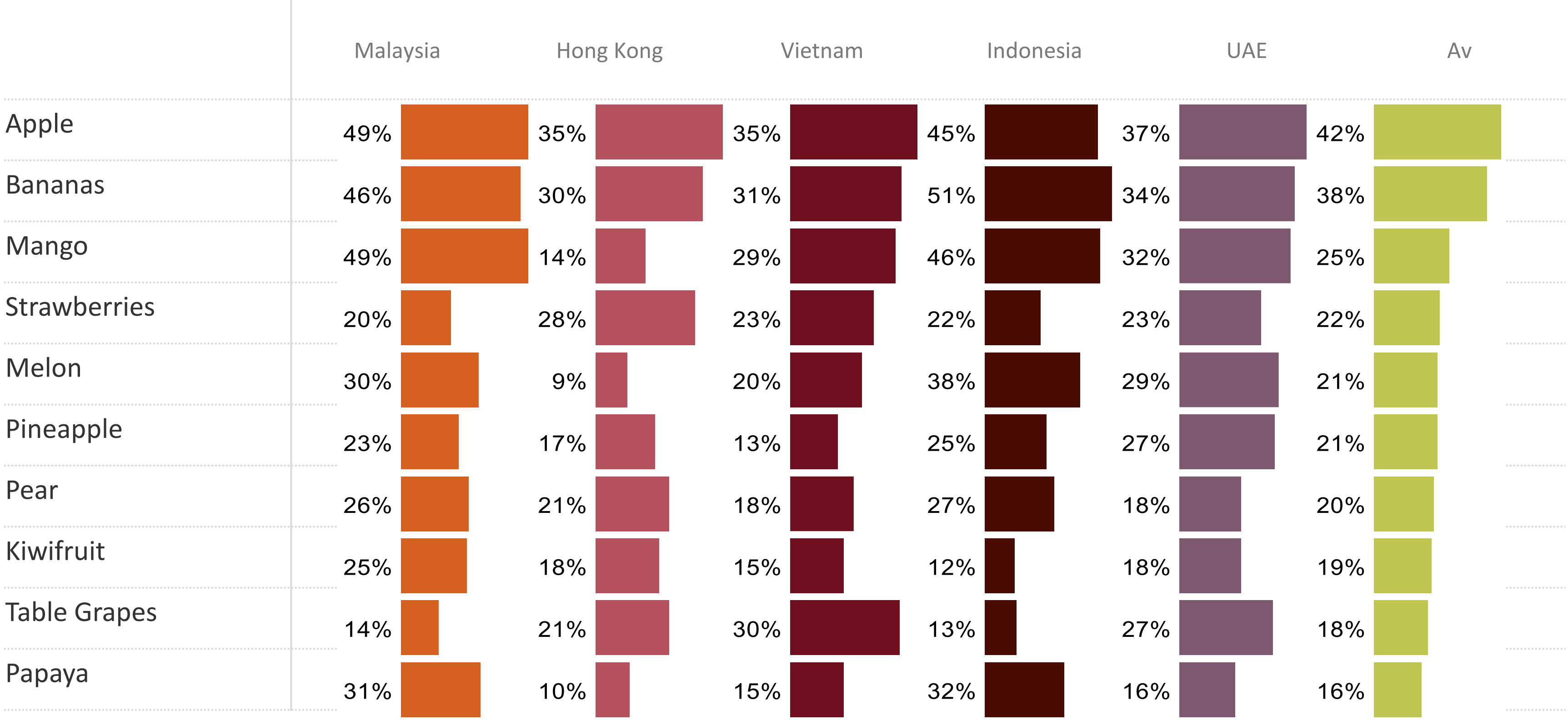
Apples and Bananas are key substitutes across priority markets along with Mangos in Vietnam, Indonesia and UAE

Citrus

What else would you typically consider having instead?



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Hort Innovation

Recommendation: How to drive growth in Australian Citrus Fruits

Citrus

1. Focus on Strategic Priority Markets

Focus on markets where category **penetration is high** and consumers are **willing to pay a premium** for quality Citrus Fruits (ie. **Malaysia, Hong Kong, Vietnam, Indonesia, and UAE**). Leverage already **high appeal for Australian Citrus Fruits in Malaysia, Hong Kong and Indonesia**, and **improve appeal in Vietnam and UAE** to drive incremental growth in Australian Citrus Fruit exports.

2. Deliver Core Consumer Needs

Deliver the core consumer needs across priority markets with Citrus Fruits that have a **refreshing taste**, and **are healthy and nutritious**. Ensure Citrus Fruits are at or above par for being **sweet, refreshing and light, that serve as a quick and easy snack.**

3. Leverage Premium Advantage

Maximise the premium opportunity by delivering Citrus Fruits that are fresher, sweeter, are higher in vitamins and minerals, and are free of pesticides.

4. Reduce Consumption Barriers

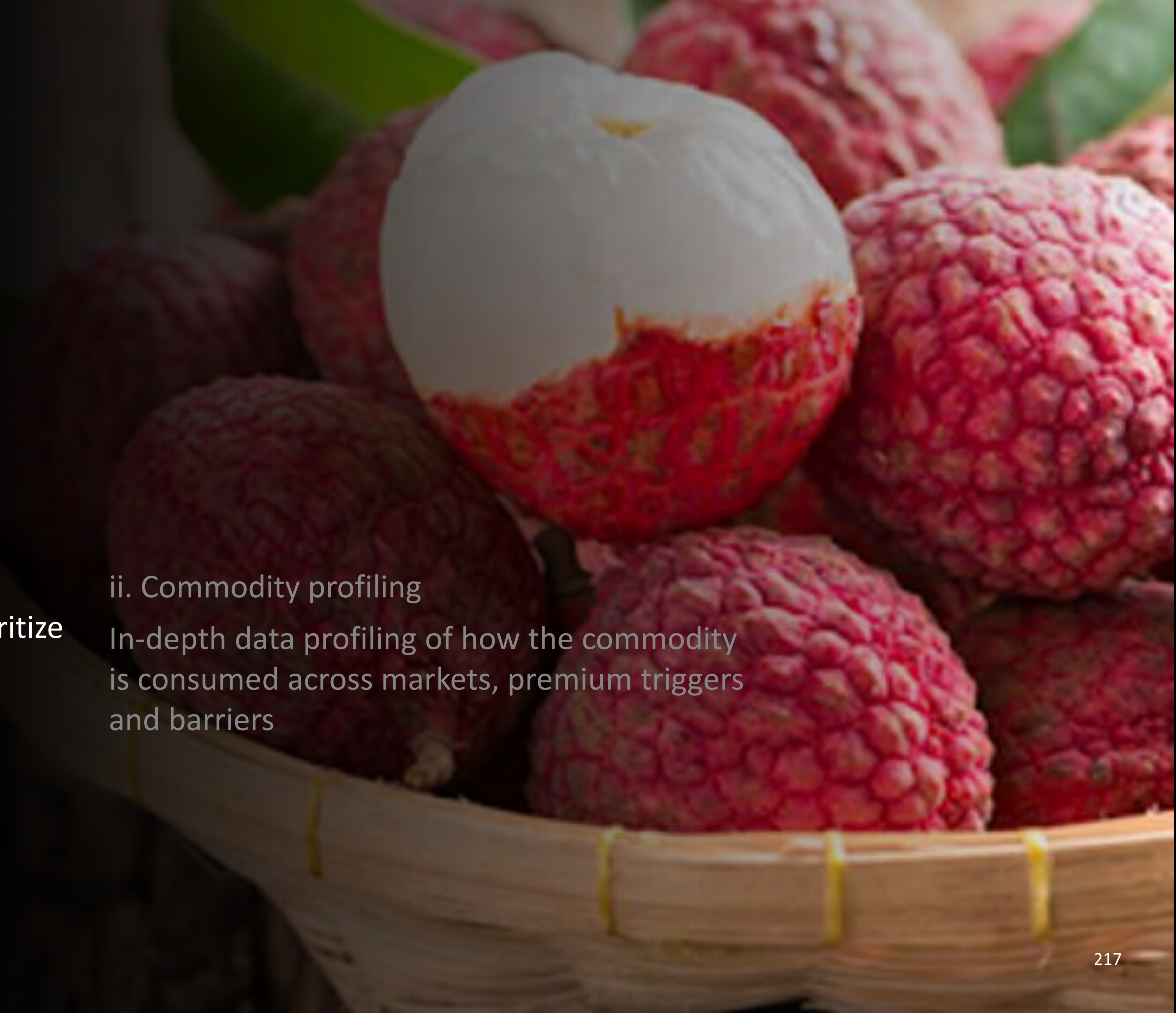
Address perceptions that Citrus Fruits are **too expensive, bruise easily** and **improve quality issues**, to minimise consumer drift to close substitutes like Apples, Bananas and Mangoes.

'Where to Play'

← *'How to Win'* →

KANTAR

3.6
Lychees



i. Market prioritisation
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In-depth data profiling of how the commodity is consumed across markets, premium triggers and barriers

Hort Innovation

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2. Markets with Existing Trade

3. Premium Opportunities

4. Focus of Investment

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    - If a market that we are currently trading with for a particularly commodity is shown NOT to be a ‘Strategic Priority’, this does NOT mean that we should consider withdrawing from this market.
    - However, we recommend re-evaluating the relative focus of investment in this market, and consider other markets when looking for **future** growth opportunities

3. Premium Opportunity

In evaluating attractive and addressable export markets, we have intentionally used data that shows where premium opportunities can be found

Rationale:

- The overall objective of this project was to identify **profitable** growth opportunities for commodities in the future, and Australian commodities will have more chance of growing profitably where they have a better chance for commanding a price premium
  - High commodity penetration in a market has also been used to evaluate attractiveness, but this analysis favours markets where there is a larger opportunity for Australian products to command a **premium**.

4. Focus of Investment

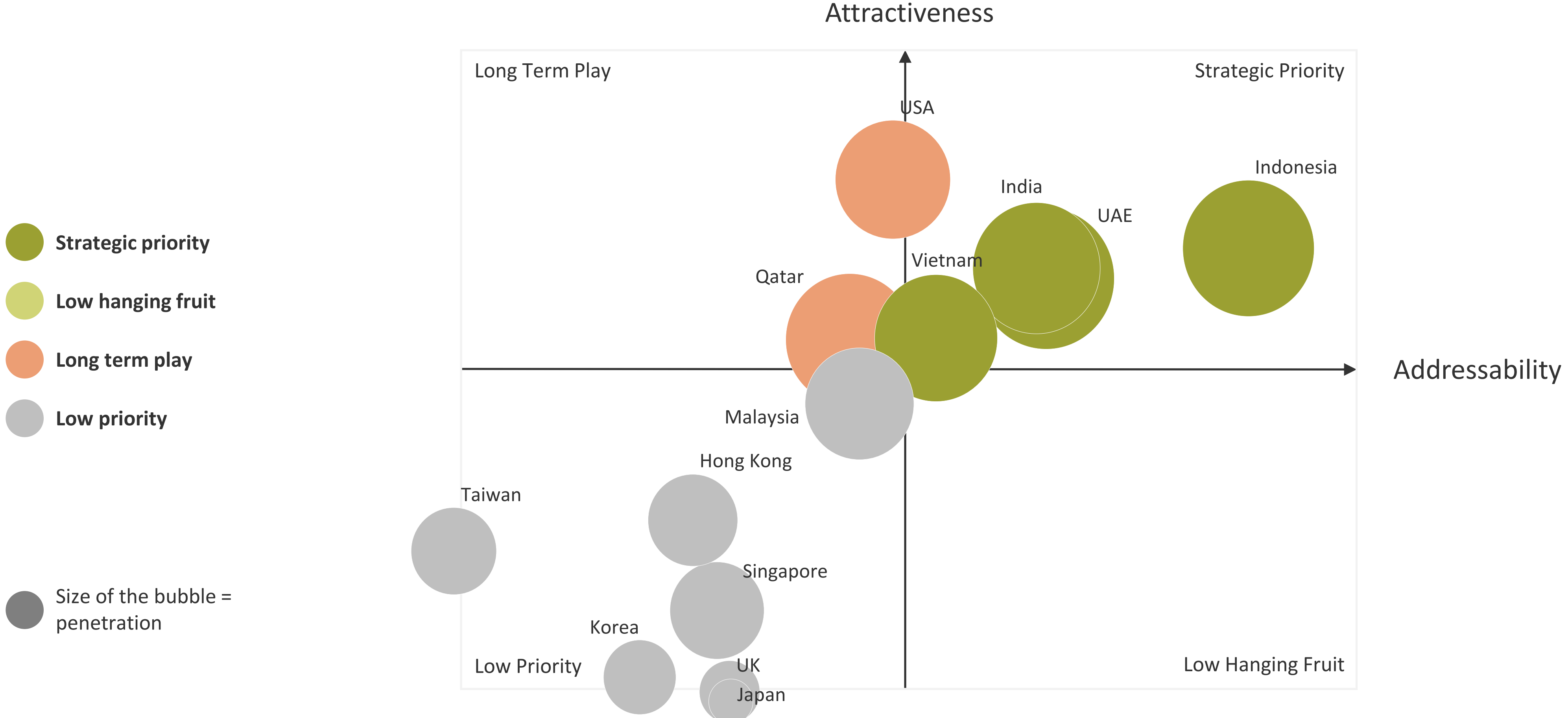
The evaluation and prioritisation of export markets into the 4 quadrants of attractiveness and addressability **is intended to be only one input into decision making** about **where to focus investment**

Rationale:

- The objective of this project was primarily to offer a consumer lens into commodity consumption, to enable export decisions to be informed by more robust consumer data (while still included additional market factor data from previous Deloitte analysis)
    - Export decisions should be made using all available information including the economics of local growers and exporters and this report forms one input into that decision process

We have identified 4 strategic priority markets that represent the most attractive and appealing export opportunity for Australian lychees, based on consumer preference and behaviour

Lychees



Source: Kantar HIA International Demand Study 2022, World Bank 2021

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Hort Innovation

Lychees: Summary of Strategic Priorities

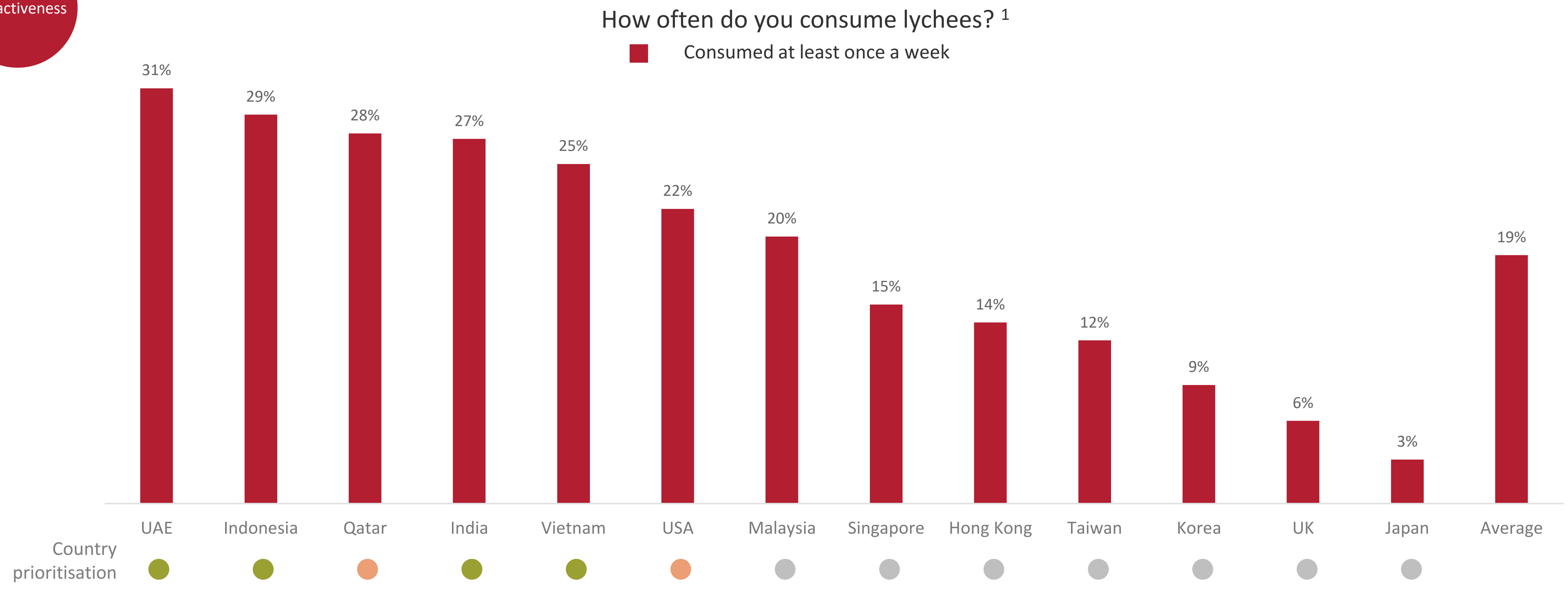
Lychees

	Indonesia	UAE	India	Vietnam
STRATEGIC IMPLICATIONS	Lychees are widely consumed in Indonesia, meaning there's a strong potential market for the commodity. The strong Australian appeal boosts export addressability, despite lower premium quality appeal	1 in 3 people in the UAE consume Lychees weekly, the highest of any market. Despite smaller population, the high per capita income and strong Australian association makes this a strong contender for export	Lychees are also widely consumed in India and the potential market is significantly larger than other countries given the population. There's also strong Australian appeal, despite moderate premium appeal	Vietnam is a less attractive or addressable opportunity vs. other strategic priorities, but penetration remains strong, alongside high Australian appeal and moderate premium quality appeal
ATTRACTIVENESS	• #2 ranking country for penetration (29% consume weekly) • High claimed willingness to pay 1.5x more for premium quality	• #1 ranking country for penetration (1 in 3 consume weekly) • Moderate claimed willingness to pay 1.5x more for premium quality	• Strong Lychee penetration • Moderate claimed willingness to pay 1.5x more for premium quality	• Strong Lychee penetration • High claimed willingness to pay 1.5x more for premium quality
ADDRESSABILITY	• Strong Australian association relative to other markets (#1 rank) • Moderate premium opportunity vs. other commodities in Indonesia	• Strong Australian association relative to other markets (#2 rank) • Moderate premium opportunity vs. other commodities	• Strong Australian association relative to other markets (#3 rank) • Moderate premium opportunity vs. other commodities	• Strong Australian association relative to other markets (#4 rank) • Moderate premium opportunity vs. other commodities

Lychees are most frequently consumed in the UAE, Indonesia & Qatar where nearly 1 in 3 consumers in these markets consuming them weekly

Lychees

Attractiveness



1 An adjustment factor has been applied to results in India, Indonesia, Vietnam, UAE and Qatar to account for overclaim in these markets – see appendix for further detail

Source: Kantar HIA International Demand Study 2022

Strategic priority · Low hanging fruit · Long term play · Low priority

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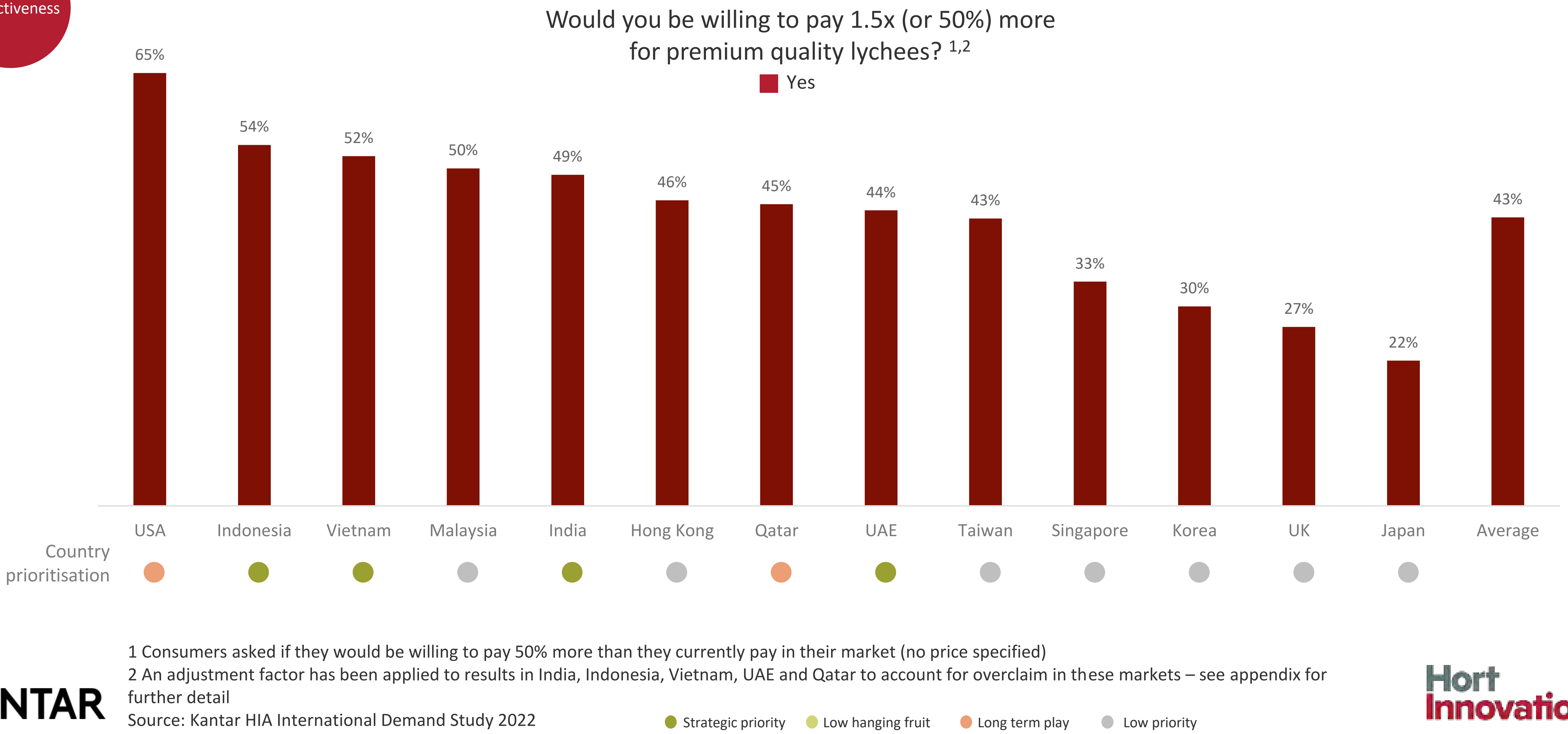
In the US especially Lychees have the potential to command a premium price

Lychees

Attractiveness



1 Consumers asked if they would be willing to pay 50% more than they currently pay in their market (no price specified)
2 An adjustment factor has been applied to results in India, Indonesia, Vietnam, UAE and Qatar to account for overclaim in these markets – see appendix for further detail
Source: Kantar HIA International Demand Study 2022

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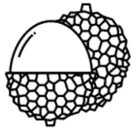
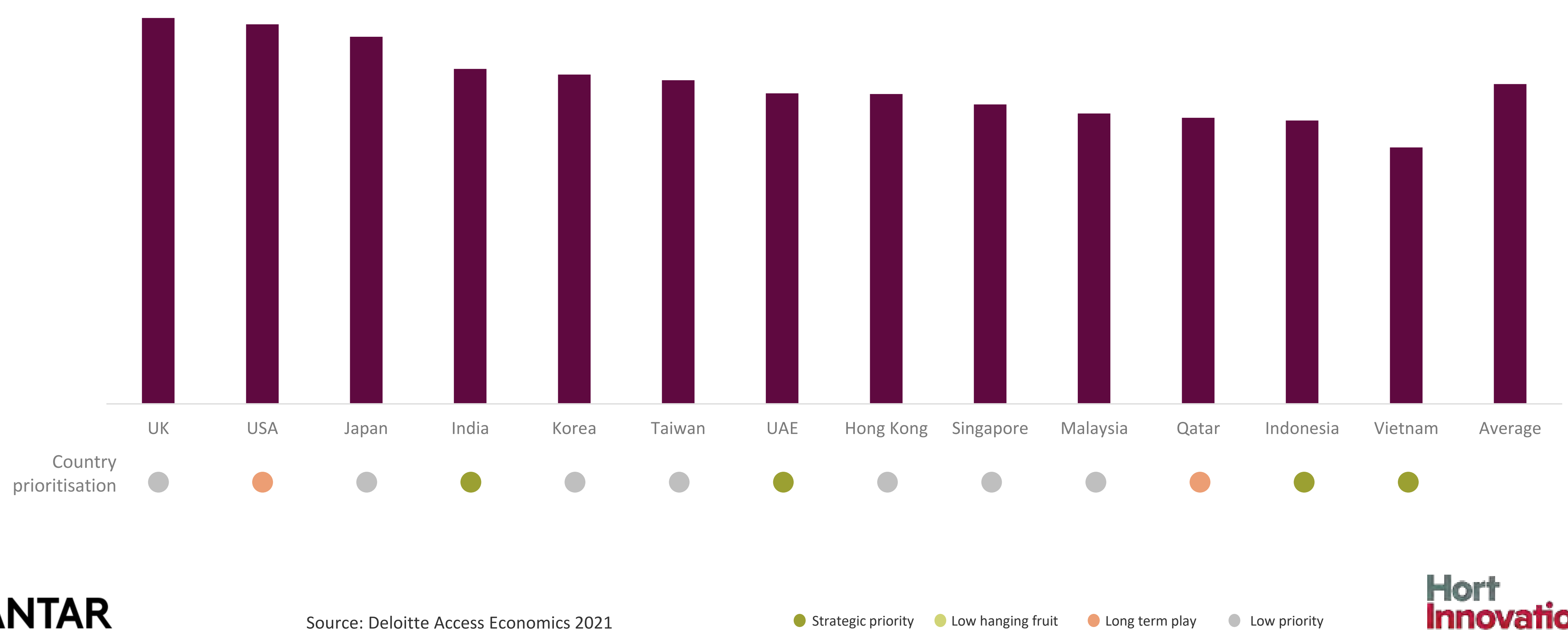
Although all markets are attractive, more affluent markets with larger populations rank n highly



Attractiveness



KANTAR

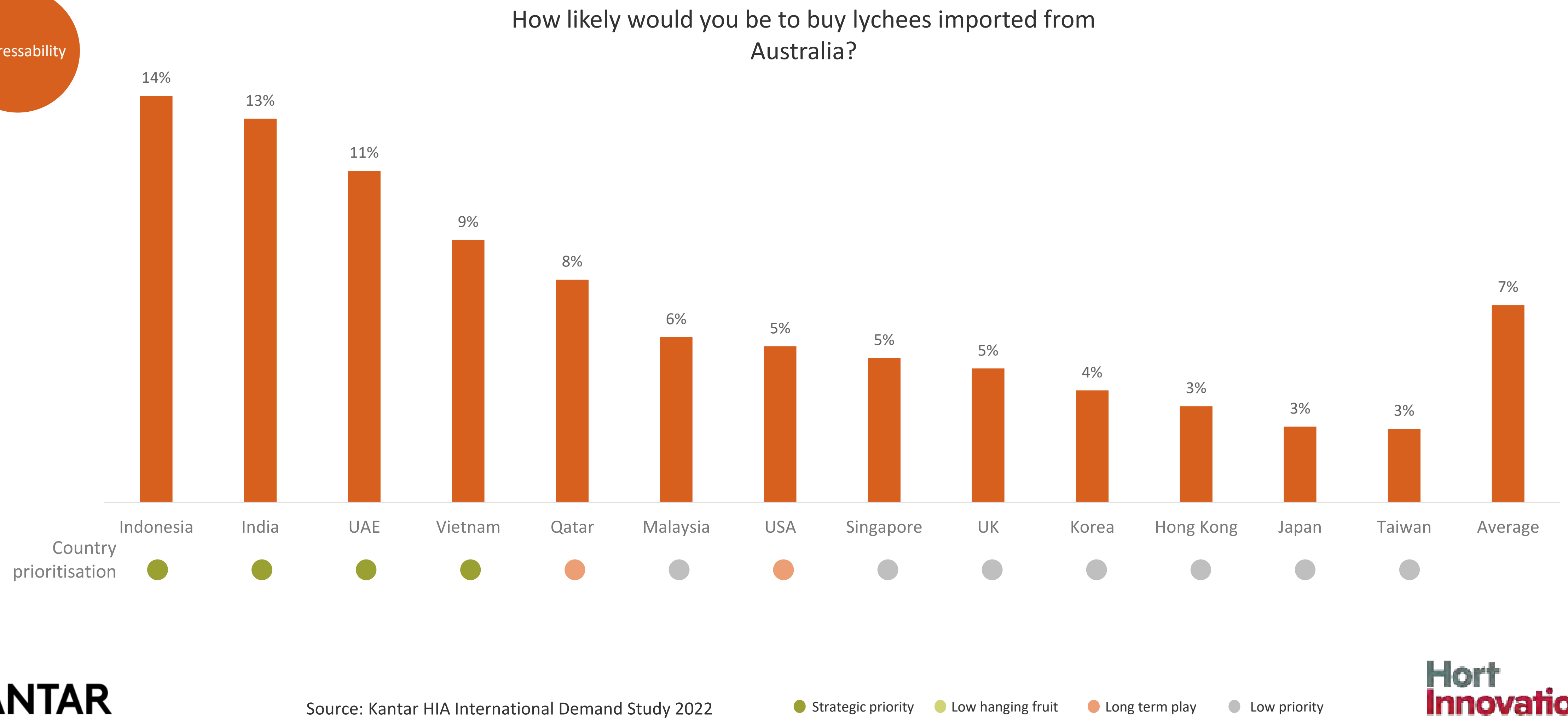
Source: Deloitte Access Economics 2021

Hort Innovation

Appeal for Australian Lychees is highest in Indonesia, India & the UAE, however Australian association is amongst the lowest of any commodity in other markets like Hong Kong, Japan, and Taiwan

Lychees

Addressability



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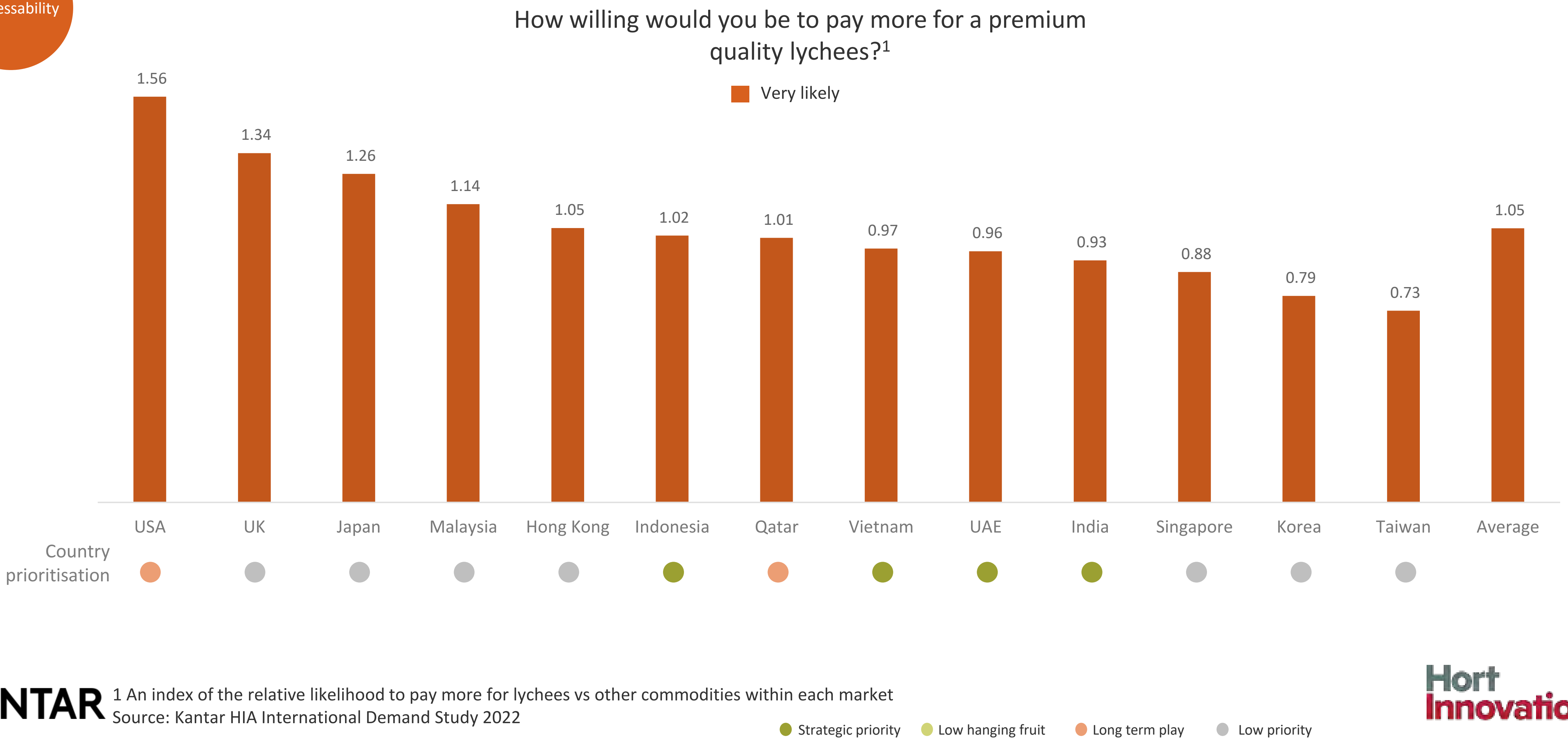
Source: Kantar HIA International Demand Study 2022

Hort Innovation

Relative desire for premium vs other commodities is strongest in the USA, UK, and Japan

Lychees

Addressability



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1 An index of the relative likelihood to pay more for lychees vs other commodities within each market

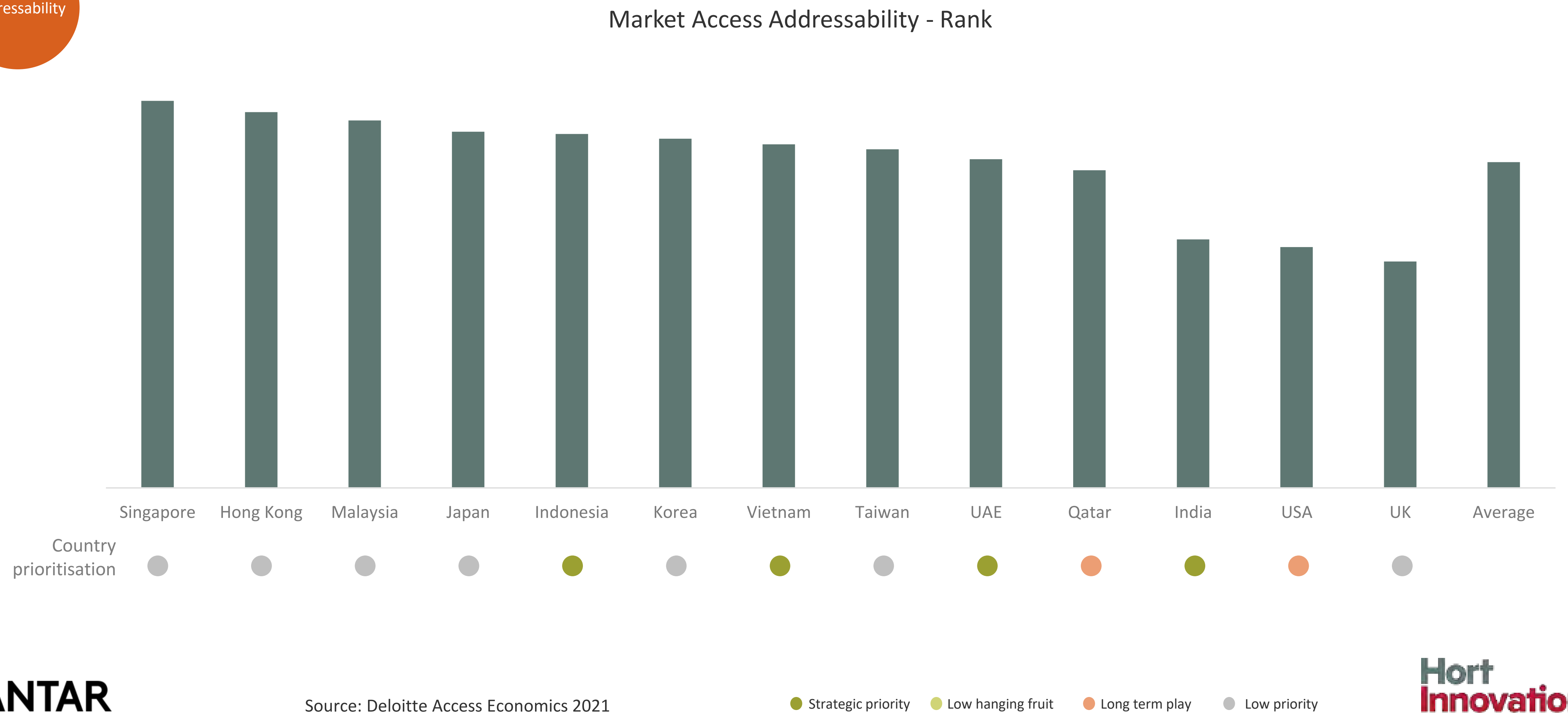
Source: Kantar HIA International Demand Study 2022

Hort Innovation

Some markets rank as more addressable due to the ease of trade, market risk and value chain competitiveness

Lychees

Addressability



Source: Deloitte Access Economics 2021

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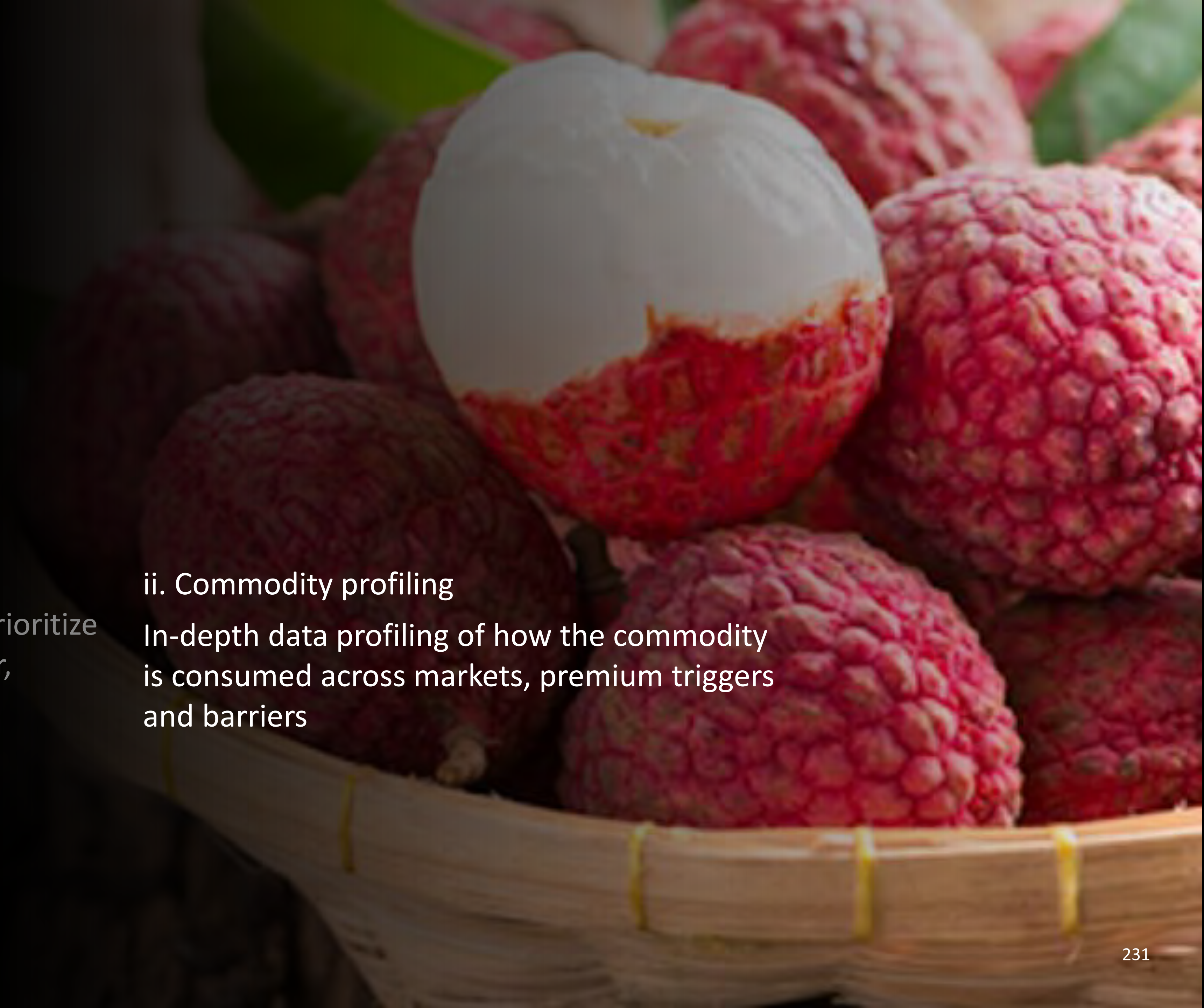
3.6

Lychees



i. Market prioritisation

Leverage the strategic framework to prioritize markets based on consumer behaviour, perception and market access

ii. Commodity profiling

In-depth data profiling of how the commodity is consumed across markets, premium triggers and barriers

Hort Innovation

The prioritisation revealed x4 markets ripe for Lychees export.
The next section will deep dive into Lychees consumption across markets

Lychees

USA | UK | Singapore | India | Japan | Hong Kong | South Korea

Market priorities

Malaysia | UAE | Qatar | Taiwan | Vietnam | Indonesia

Market priorities

Strategic priority · Low hanging fruit · Long term play · Low priority

Lychees consumption snapshot

Lychees

	India	Vietnam	Indonesia	UAE
HOW OFTEN (P1W pen.)	27%	25%	29%	31%
WHEN	Snack Lunch	Dessert Lunch	Snack Lunch	Snack
HOW	Fresh on its own	Fresh on its own	Fresh on its own In a Smoothie / Frappe / Juice	Fresh on its own
WHY	Tasty Indulgence	Tasty Indulgence Connection	Tasty Indulgence	Tasty Indulgence
WHERE	At home	At home	At home	At home
WHO WITH	With Family	With Family	With Family	With Family

Source: Kantar HIA International Demand Study 2022

Lychees: Strategic Imperatives

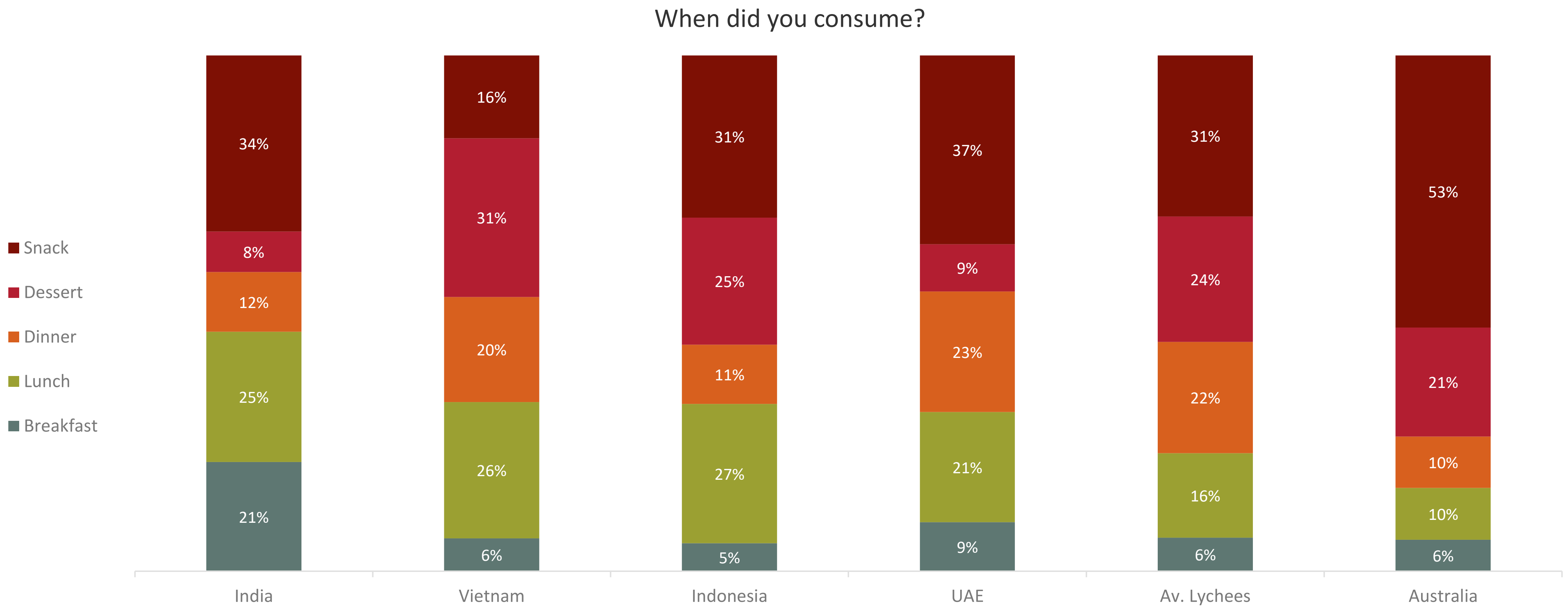
Lychees

	India	Vietnam	Indonesia	UAE
CONSUMER PREFERENCES	As a tasty and indulgent snack or lunch, fresh on its own, at home with family	As a tasty and indulgent lunch or dessert, fresh on its own, to connect with family at home	As a tasty and indulgent snack or lunch, fresh on its own or in a smoothie / frappe / juice, at home with family	As a tasty and indulgent snack between lunch and dinner, fresh on its own, at home with family
NEEDS TO SATISFY	Tasty Indulgence	Tasty Indulgence Connection	Tasty Indulgence	Tasty Indulgence
FUNCTIONAL ATTRIBUTES	Refreshing Taste Fresh & Light	Refreshing Taste Sweet	Refreshing Taste Sweet	Refreshing Taste Fresh & Light
PREMIUM OPPORTUNITY	Fresher Sweeter	Fresher	Fresher Sweeter	Fresher Sweeter
BARRIERS TO OVERCOME	Too expensive	Bruises Easily Too much sugar	Too expensive	Too expensive
KEY SUBSTITUTES	Apples Bananas	Apples Bananas	Mangoes Apples Bananas	Bananas Apples

Source: Kantar HIA International Demand Study 2022

In priority markets outside of Vietnam, Lychees are most frequently consumed as a snack, followed by lunch. In Vietnam they are more frequently consumed as part of dessert

Lychees



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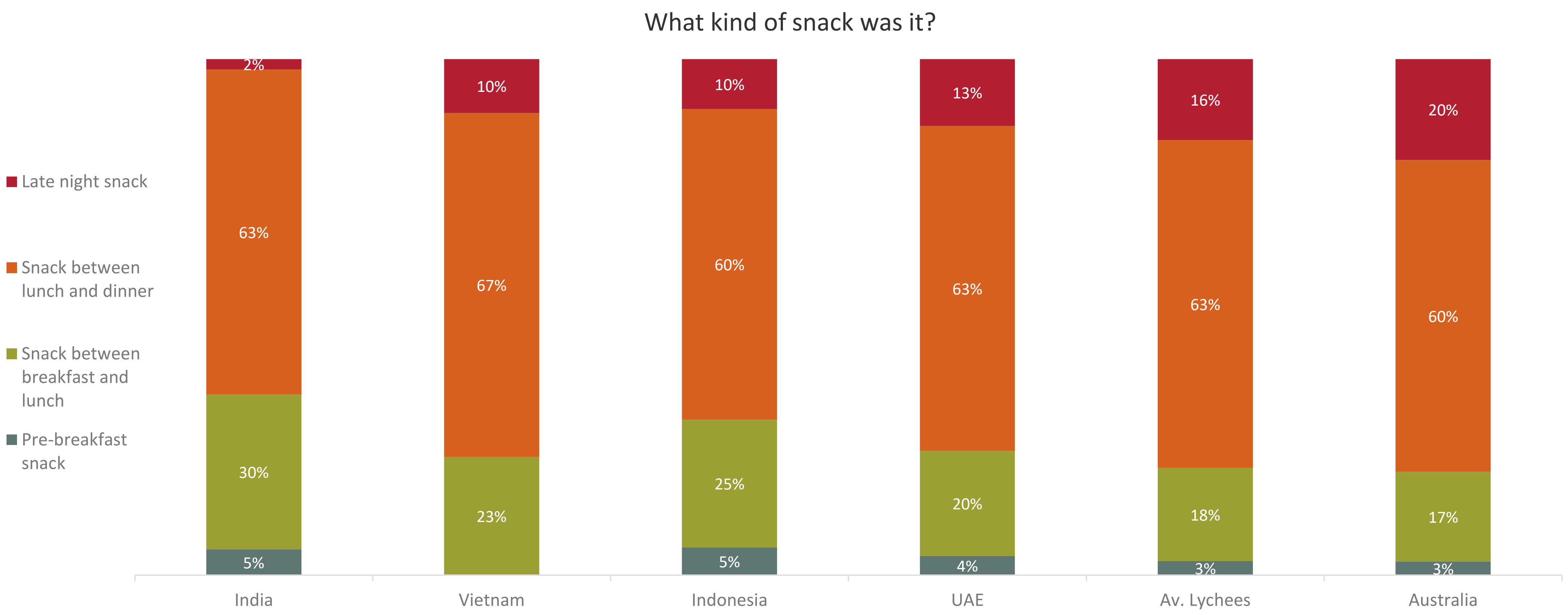
Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	299	296	293	300	299	296	226	294	299	296	295	40

Hort Innovation

When consumed as a snack, Lychees are usually consumed between lunch and dinner

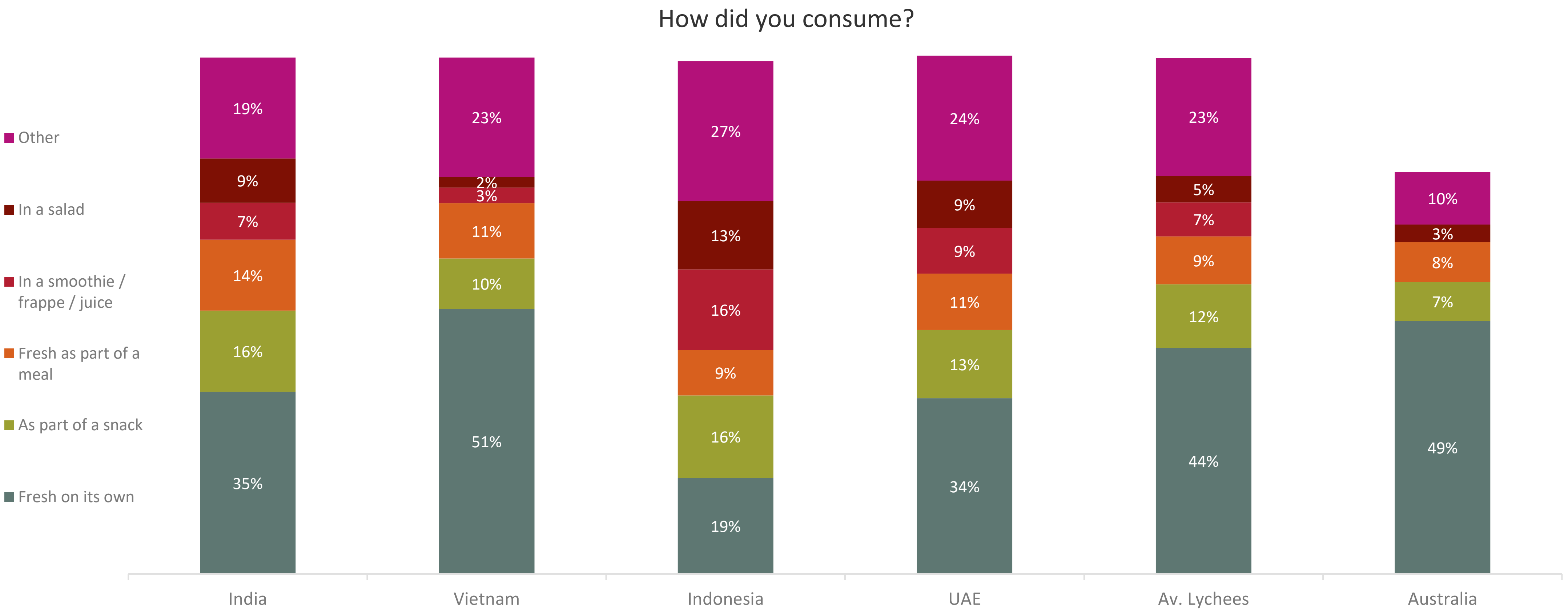
Lychees



Source: Kantar HIA International Demand Study 2023

Lychees are most often consumed fresh on their own, especially in Vietnam. They are also consumed as part of a snack

Lychees



'Other' = As a topping (e.g., on yoghurt, as a garnish etc.), Cooked on its own, As part of an alcoholic drink e.g. cocktail, As an ingredient in cooking, As an ingredient in baking, For decoration / show only, To make baby food / puree and Don't know

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
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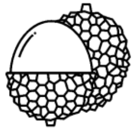
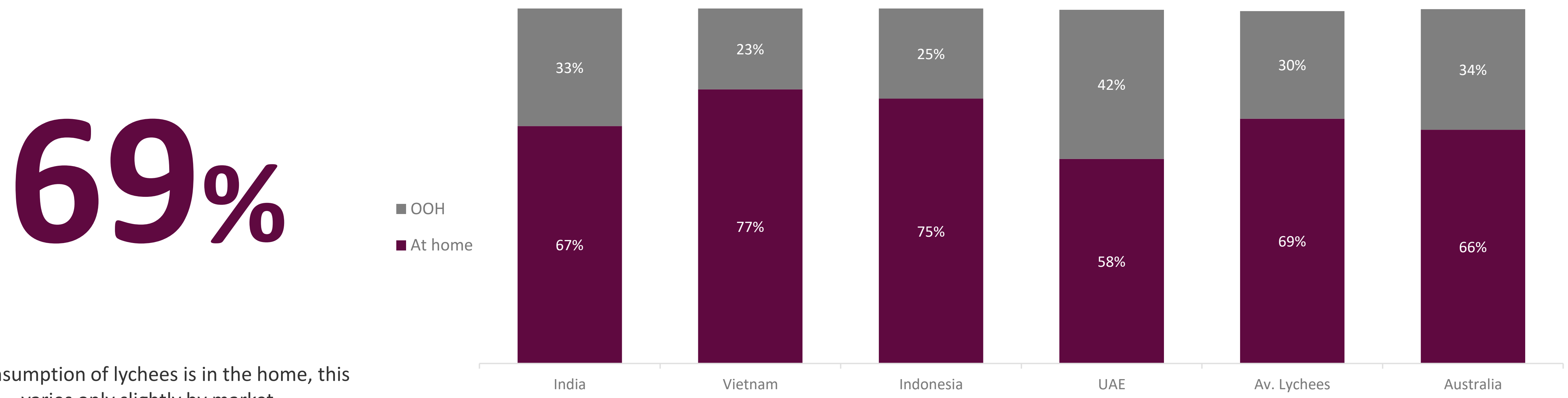
Most people consume Lychees at home. UAE skews more out of home



Lychees

Where were you?



Of consumption of lychees is in the home, this varies only slightly by market

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
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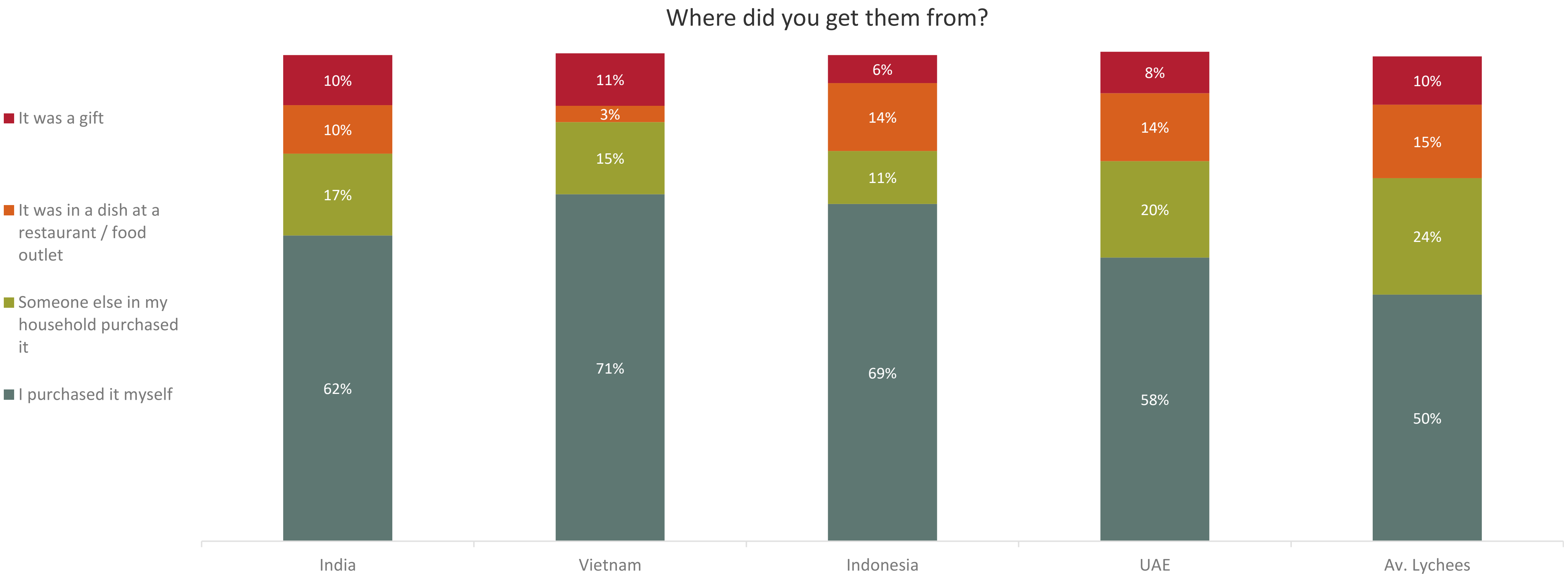
Most people purchase Lychees themselves

Lychees



Source: Kantar HIA International Demand Study 2023

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	292	299	296	293	300	299	296	226	294	299	296	295	40

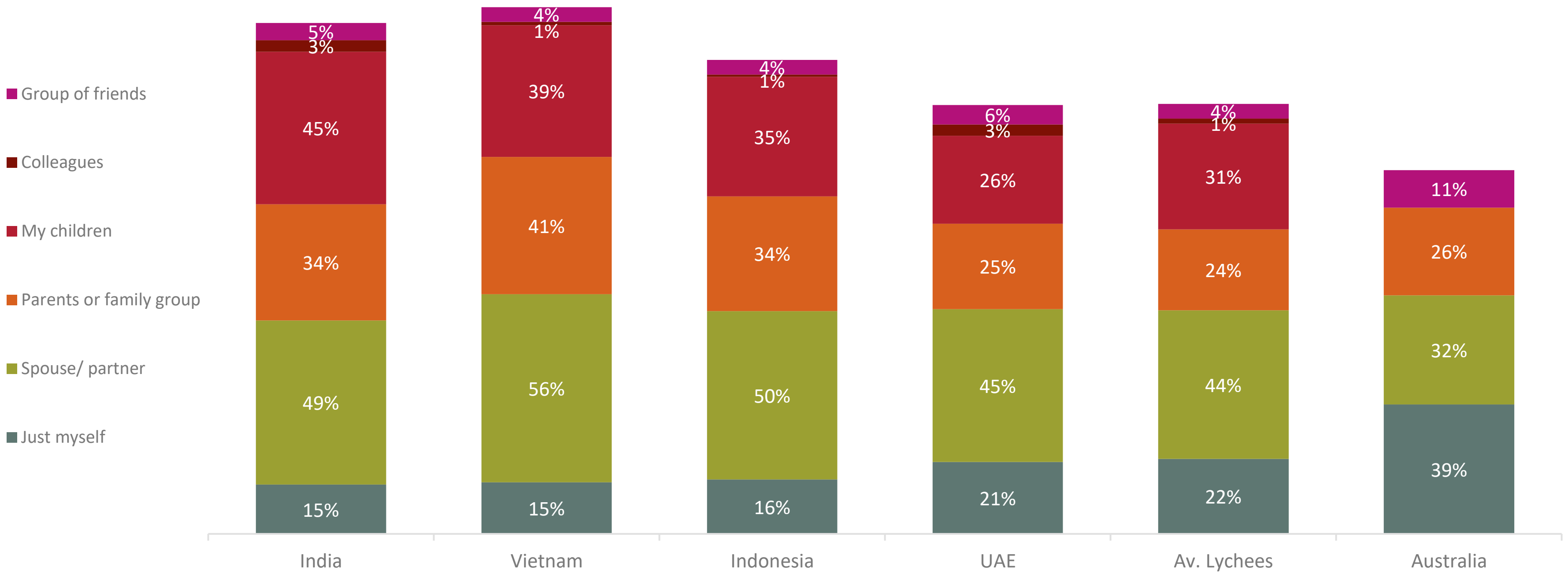
Lychees are generally consumed with a spouse or partner or as part of a broader family group

Lychees

Who were you with?

31%

Of consumption of lychees (on average) is with children.



There is a range of reasons why people choose to eat different fruits & vegetables. There are
6 universal consumer needs pillars that drive this choice for consumers globally

The 6 needs pillars are universal across commodities and global markets

Tasty

All about: Taste, Refreshment, and Enjoyment

Quick & Easy

All about: Convenience Simplicity, and Ease

Healthy & Nutritious

All about: Guilt-free, Nourishing and Sensible

Indulgence

All about: Comfort, Relaxation and Self Care

Physical & Mental Energy

All about: Energy, Uplift, and Reinvigoration

Connection

All about: Bonding, Celebration and Creating Memories

In priority markets, the most important reasons people choose to consume Lychees are for something tasty, indulgent and quick & easy

63%

of people in priority markets consume Lychees for something

Tasty

47%

of people in priority markets consume Lychees for something

Indulgent

42%

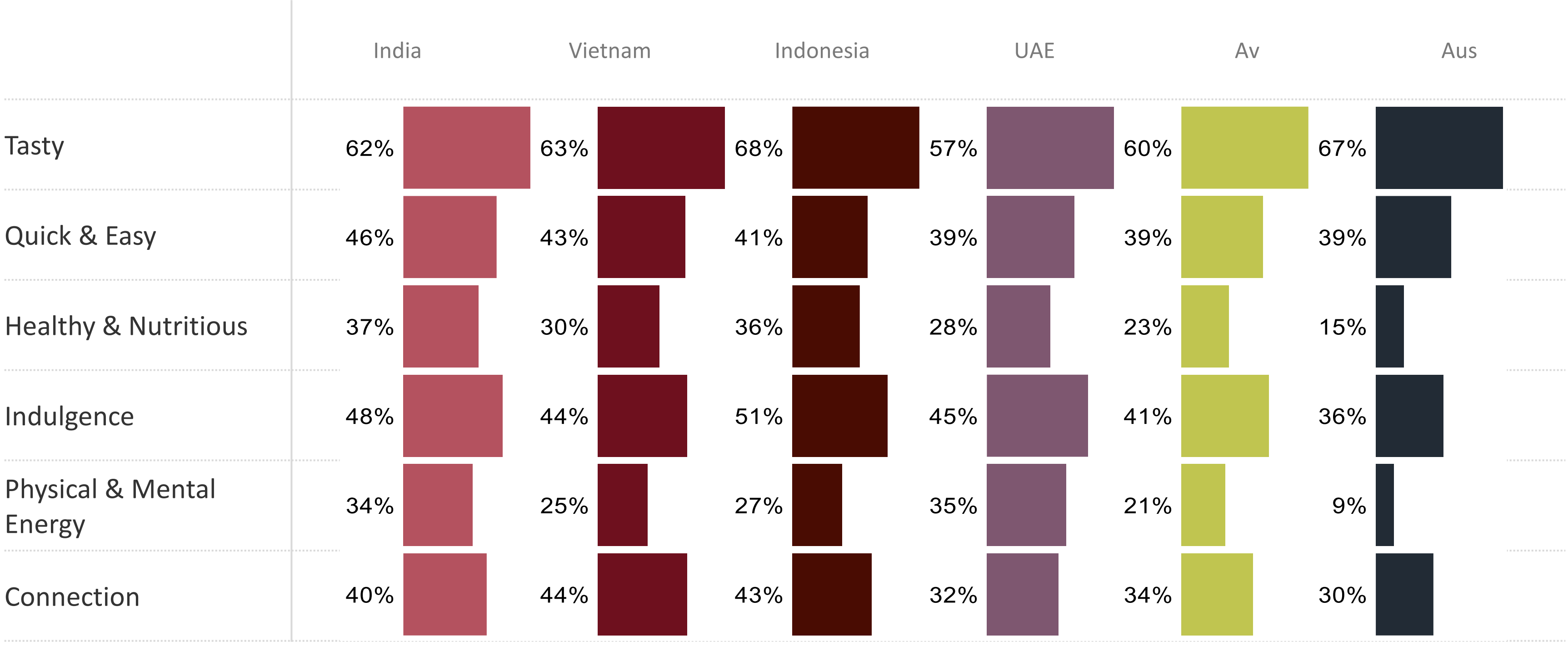
of people in priority markets consume Lychees for something

Quick & Easy

Taste is the most important consumption driver across all markets, followed by Indulgence

Lychees

Which were important when choosing to consume?



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Source: Kantar HIA International Demand Study 2023

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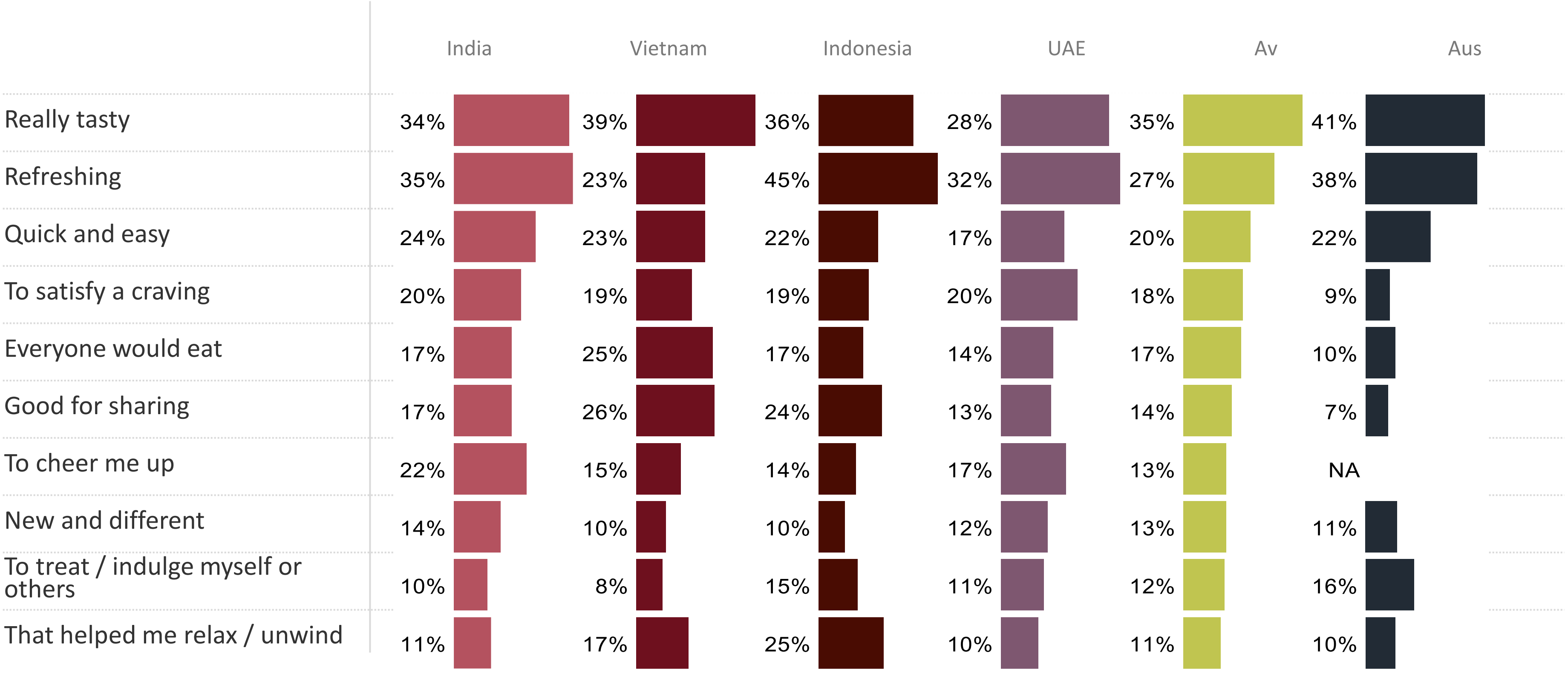
	292	299	296	293	300	299	296	226	294	299	296	295	40

Hort Innovation

Specifically consumers are looking for ‘really tasty’ and ‘refreshing’

Lychees

Which were important when choosing to consume?



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Hort Innovation

More functionally, consumers are looking for Lychees that are sweet and fresh with a refreshing taste

32%

of people in priority markets are looking for Lychees that have

Refreshing taste

29%

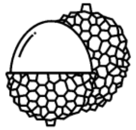
of people in priority markets are looking for Lychees that are

Sweet

27%

of people in priority markets are looking for Lychees that are

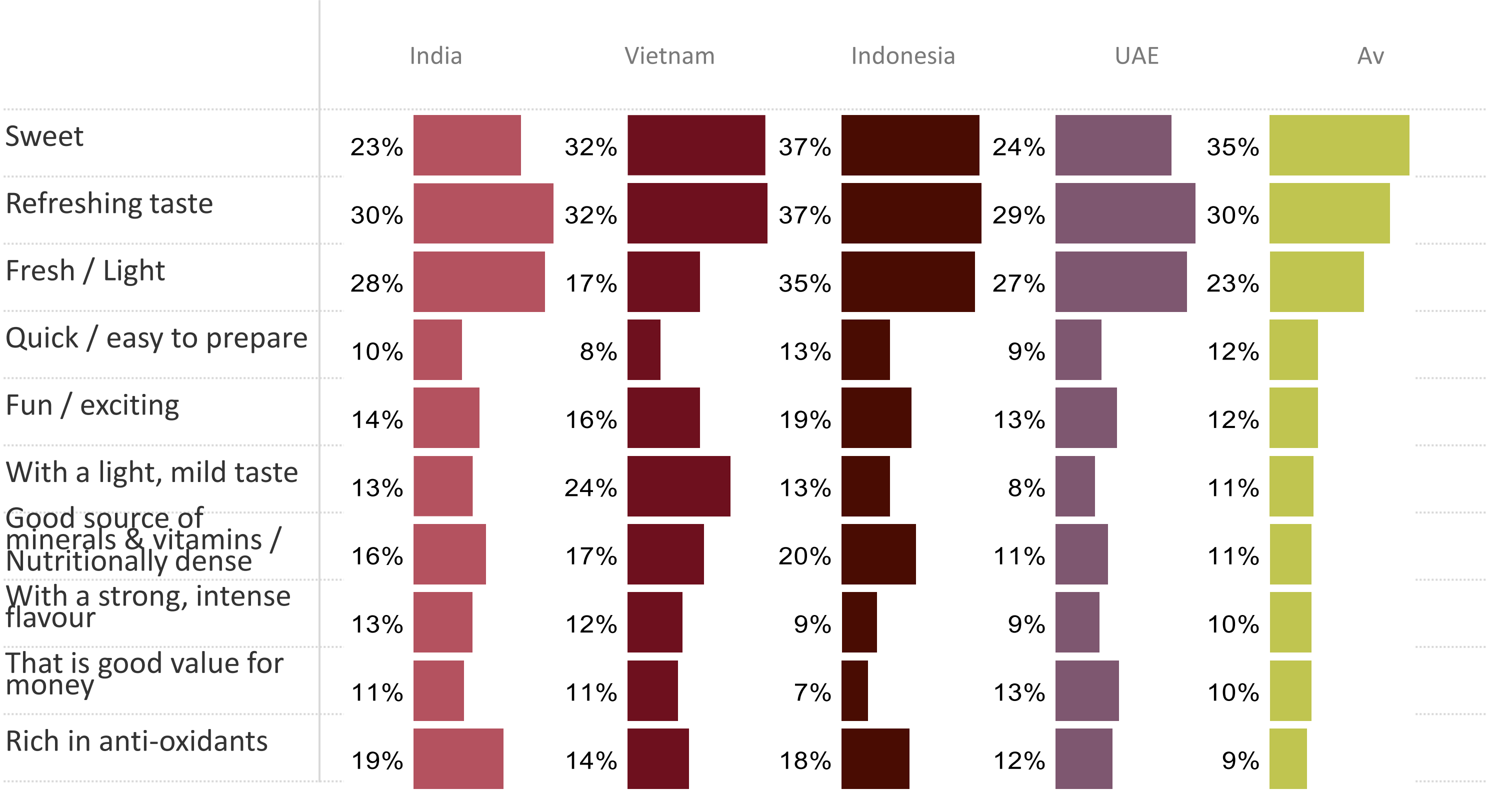
Fresh / Light



Lychees

Across priority markets, consumers are looking for lychees that are sweet and have refreshing taste. In India, Indonesia and UAE they also look for fresh and light

What were you looking for when you consumed?



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Hort Innovation

When it comes to the premium opportunity, consumers are looking for Lychees that are fresher, sweeter, have more flavour, and are safe & trusted

42%

of people in priority markets are looking for premium Lychees that are

Fresher

32%

of people in priority markets are looking for premium Lychees that are

Sweeter

26%

of people in priority markets are looking for premium Lychees that have

More Flavour

26%

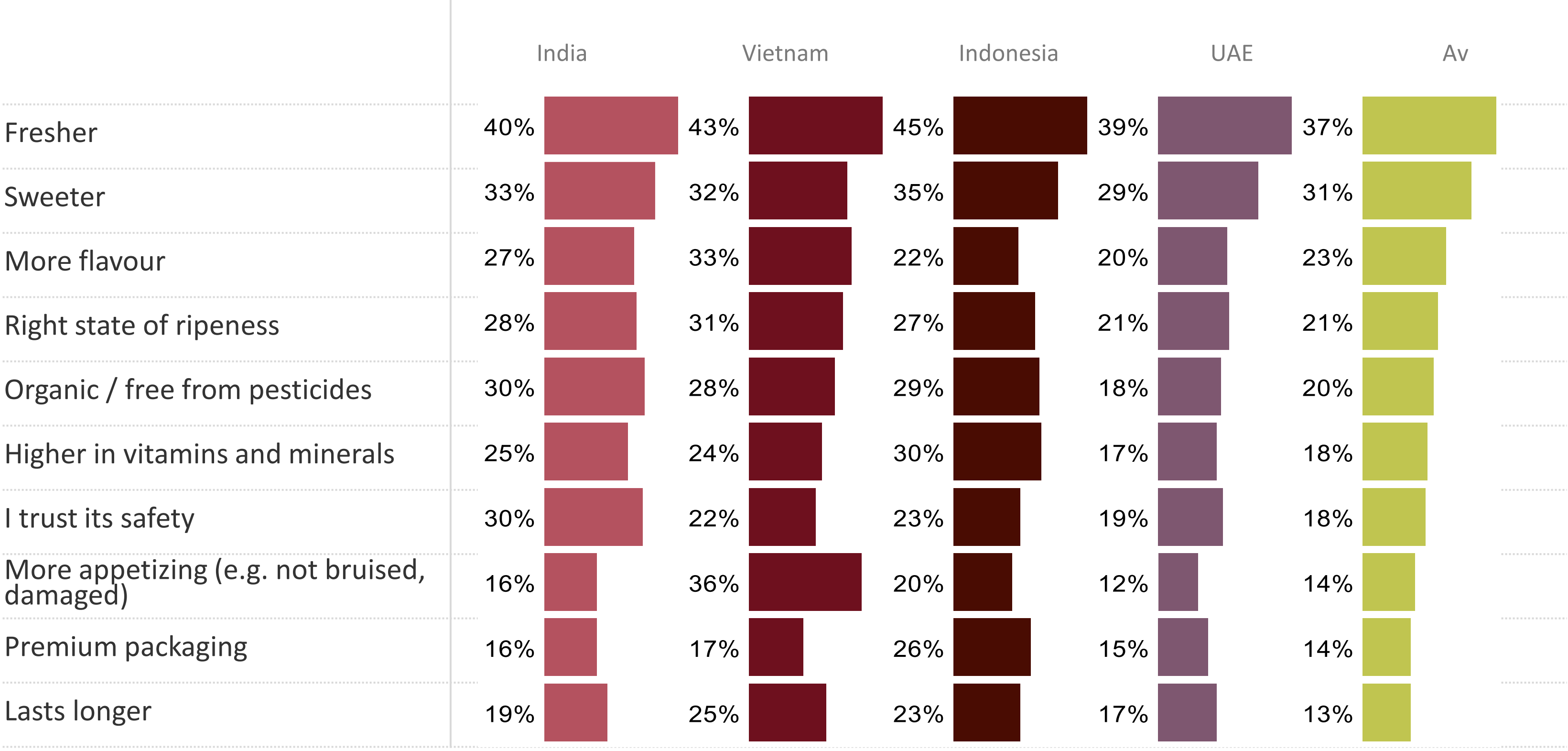
of people in priority markets are looking for premium Lychees that are

Safe & Trusted

Premium Lychees are characterised by freshness and sweetness across priority markets and more appetising appearance in Vietnam

Lychees

What does premium quality mean to you?



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Price is the biggest barrier to overcome with lychee consumption, followed by bruising easily and high sugar.

Apples, Bananas and Mangoes are considered worthy substitutes

Barriers to Consumption

Price	Bruise Easily	High Sugar
23% (priority market average)	19% (priority market average)	17% (priority market average)

Leading Substitutes

Apple	Banana	Mango
37% (priority market average)	35% (priority market average)	32% (priority market average)

Lychees

Price is the most significant barrier across priority markets except Vietnam where bruising is most important

What are the reasons you may not choose?

	India	Vietnam	Indonesia	UAE	Av
It is too expensive	25%	19%	24%	24%	26%
It contains too much sugar	15%	26%	17%	10%	16%
There are more exciting alternatives	14%	18%	23%	11%	13%
It bruises easily	18%	33%	10%	13%	12%
It is too messy to eat	9%	9%	5%	9%	11%
Quality is often poor	16%	17%	11%	18%	11%
It goes off too quickly / it does not last	17%	22%	10%	11%	10%
Not enough people in my household like it/them	10%	9%	15%	14%	10%
It will not fill me up	14%	9%	8%	11%	9%
It is not convenient / ideal for on the go	10%	7%	6%	8%	8%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
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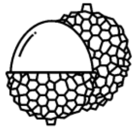
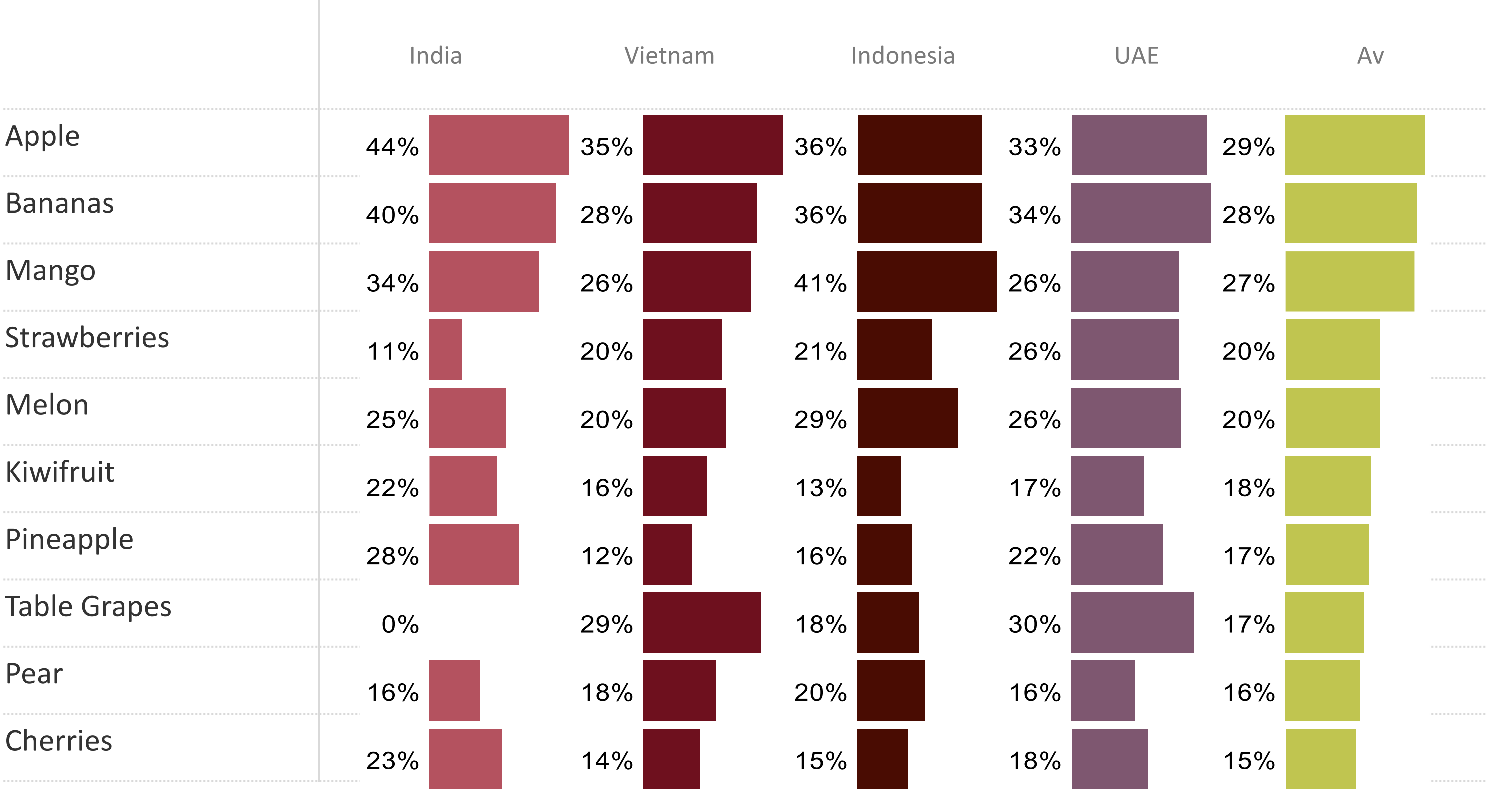
Hort Innovation



Lychees

Apples, Bananas and Mangos are key substitutes across priority markets along with Table Grapes in Vietnam and UAE

What else would you typically consider having instead?



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	292	299	296	293	300	299	296	226	294	299	296	295	40

Recommendation: How to drive export growth in Australian Lychees

Lychees

1. Focus on Strategic Priority Markets

Focus on markets where consumers are **willing to pay a premium** for quality Lychees (ie. **Indonesia, UAE, India and Vietnam**). **Improve knowledge** and **appeal of Australian Lychees in all priority markets** drive incremental growth in Australian Lychee exports.

2. Deliver Core Consumer Needs

Deliver the core consumer needs across priority markets with Lychees that have a **refreshing taste**, and **are an indulgence that is good for sharing**. Ensure Lychees are at or above par for being **sweet, fresh and light, that serve as a quick and easy snack, are as part of lunch or dessert.**

3. Leverage Premium Advantage

Maximise the premium opportunity by delivering Lychees that are fresher, sweeter, have more flavour, and come from a safe and trusted source.

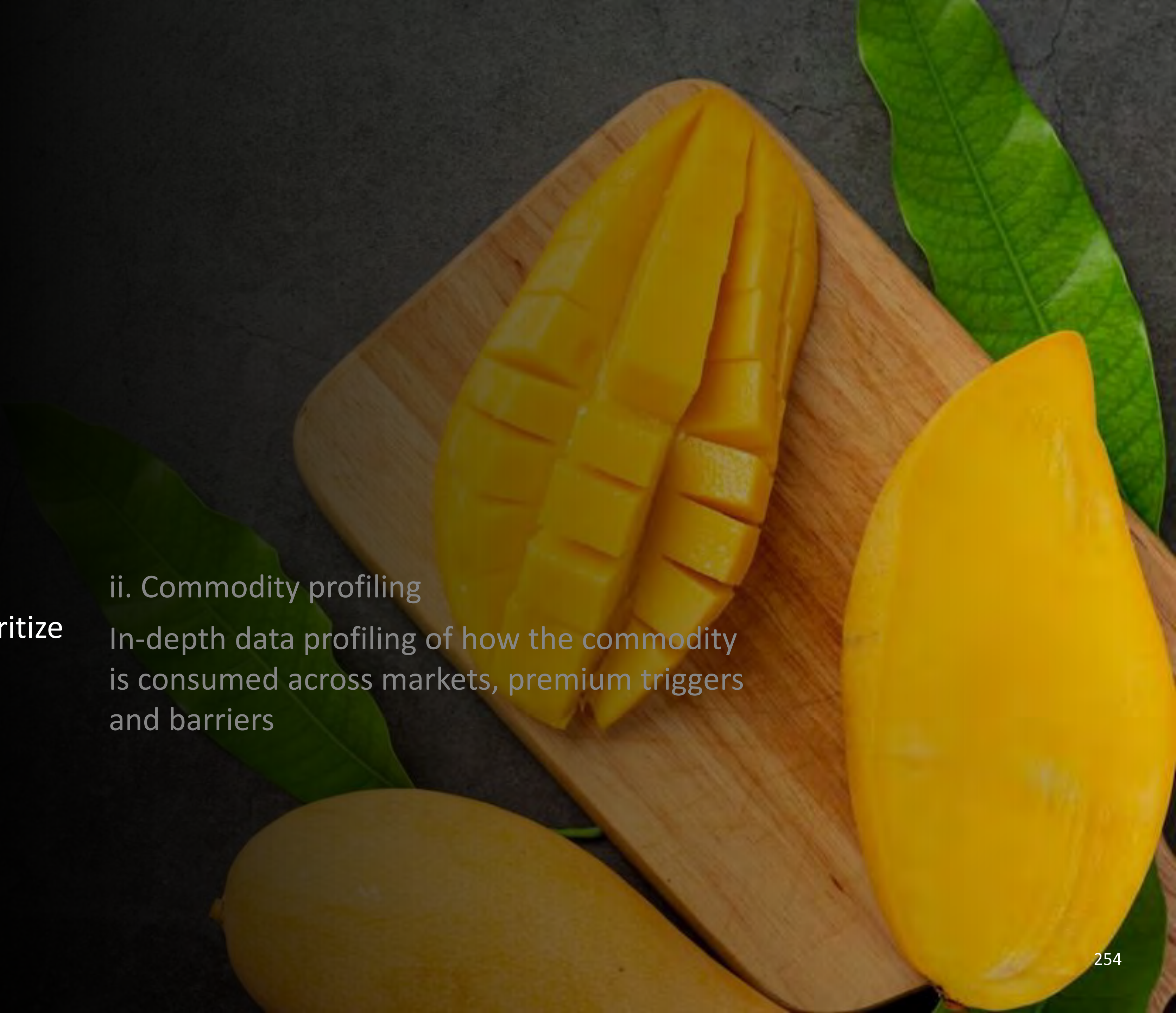
4. Reduce Consumption Barriers

Address perceptions that Citrus Fruits are **too expensive, bruise easily** and **are high in sugar**, to minimise consumer drift to close substitutes like Apples, Bananas and Mangoes**.**

'Where to Play'   ← *'How to Win'* →

KANTAR

3.7
Mango



i. Market prioritisation

Leverage the strategic framework to prioritize markets based on consumer behaviour, perception and market access

ii. Commodity profiling

In-depth data profiling of how the commodity is consumed across markets, premium triggers and barriers

Hort Innovation

4 key considerations when interpreting the outputs of the Market Prioritisation

1. No Existing Technical Market Access

2. Markets with Existing Trade

3. Premium Opportunities

4. Focus of Investment

1. No Existing Technical Market Access

Existing technical market access for a commodity was **intentionally NOT included** in the evaluation of addressability

Rationale:

- This project was designed to identify attractive and addressable **future** growth geographies therefore the analysis was not restricted by current arrangements
- This research is intended to **support and inform industry** decisions regarding the progress of any potential future or ongoing market access or market improvement request

2. Markets with Existing Trade

While the addressability calculation includes data on general market access and trade, it intentionally does not include whether Australia currently trades in a particular commodity

Rationale:

- The objective of this analysis is to provide an objective assessment of whether a market is attractive and addressable independent of current arrangements
  - If a market that we are currently trading with for a particularly commodity is shown NOT to be a ‘Strategic Priority’, this does NOT mean that we should consider withdrawing from this market.
  - However, we recommend re-evaluating the relative focus of investment in this market, and consider other markets when looking for **future** growth opportunities

3. Premium Opportunity

In evaluating attractive and addressable export markets, we have intentionally used data that shows where premium opportunities can be found

Rationale:

- The overall objective of this project was to identify **profitable** growth opportunities for commodities in the future, and Australian commodities will have more chance of growing profitably where they have a better chance for commanding a price premium
  - High commodity penetration in a market has also been used to evaluate attractiveness, but this analysis favours markets where there is a larger opportunity for Australian products to command a **premium**.

4. Focus of Investment

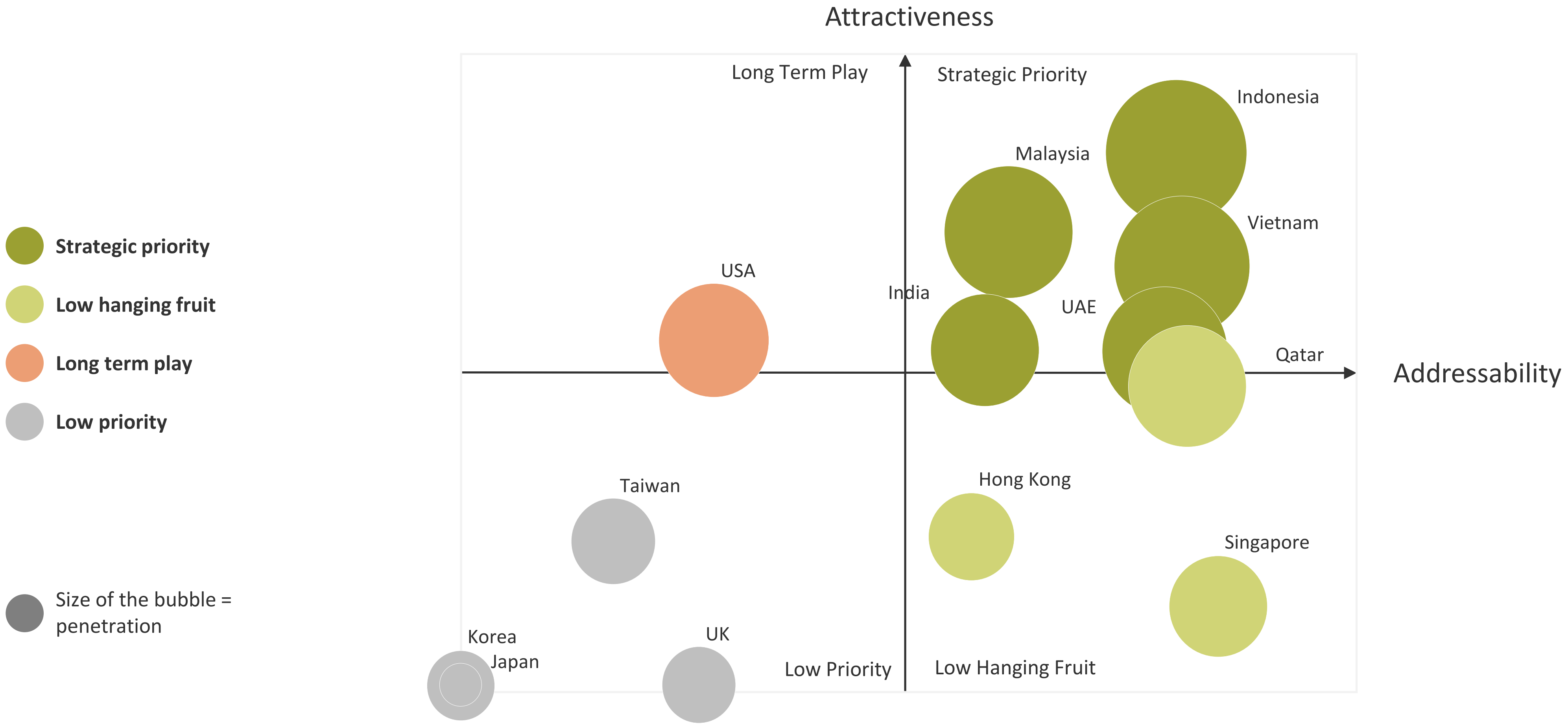
The evaluation and prioritisation of export markets into the 4 quadrants of attractiveness and addressability **is intended to be only one input into decision making** about **where to focus investment**

Rationale:

- The objective of this project was primarily to offer a consumer lens into commodity consumption, to enable export decisions to be informed by more robust consumer data (while still included additional market factor data from previous Deloitte analysis)
  - Export decisions should be made using all available information including the economics of local growers and exporters and this report forms one input into that decision process

We have identified 5 strategic priority markets that represent the most attractive and appealing export opportunity for Australian mangos

Mango



Source: Kantar HIA International Demand Study 2022, World Bank 2021

Mango: Summary of Strategic Priorities

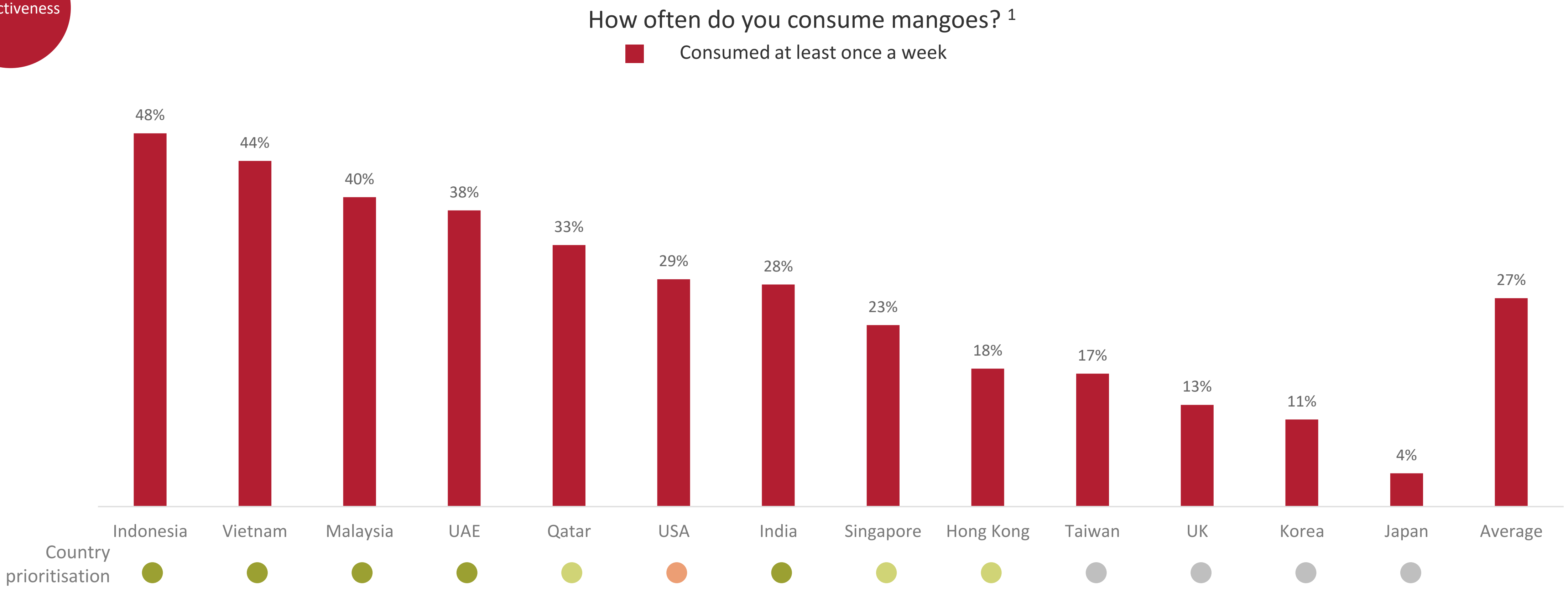
Mango

	Indonesia	Vietnam	UAE	Malaysia	India
STRATEGIC IMPLICATIONS	The mango market in Indonesia represents a significant opportunity due to the high penetration of this commodity, Indonesia also has a relatively strong market access measure	Vietnam also a strong export opportunity because mangoes are highly penetrated. There's decent consumer addressability to realize the opportunity	Penetration is lower in the UAE, but premium quality and Australian appeal makes this an opportunity for export	Penetration of mangoes in Malaysia is high and it's an attractive export market. Consumer addressability is more moderate, but compensated by a strong market access rank	India is a sizeable opportunity for export. Penetration of mangoes is lower vs. other commodities, but there remains quality and Australian appeal
ATTRACTIVENESS	• #1 ranking country for mango penetration (nearly 1 in 2 people consume weekly) • Strong claimed willingness to spend 1.5x more on premium quality (#2 rank)	• #2 ranking country for mango penetration • Strong claimed willingness to spend 1.5x more	• Strong mango penetration (38% consume weekly) • Moderate willingness to pay more	• Very strong mango penetration (40% consume weekly) • Strong claimed willingness to spend 1.5x more on premium quality (#1 rank)	• Moderate mango penetration • High claimed willingness to spend 1.5x more
ADDRESSABILITY	• Strong Australian appeal • Moderate premium quality appeal vs. other commodities in Indonesia	• Strong Australian appeal • Low premium quality appeal vs. other commodities in Indonesia	• Strong Australian appeal • Moderate premium quality appeal vs. other commodities in Indonesia	• Moderate Australian appeal • Moderate premium quality appeal vs. other commodities in Indonesia	• Moderate Australian appeal • Moderate premium quality appeal vs. other commodities in Indonesia

Mangoes are quite a highly penetrated commodity most frequently consumed in Indonesia & Vietnam with nearly 1 in 2 people having them weekly

Mango

Attractiveness



1 An adjustment factor has been applied to results in India, Indonesia, Vietnam, UAE and Qatar to account for overclaim in these markets – see appendix for further detail

Source: Kantar HIA International Demand Study 2022

Strategic priority · Low hanging fruit · Long term play · Low priority

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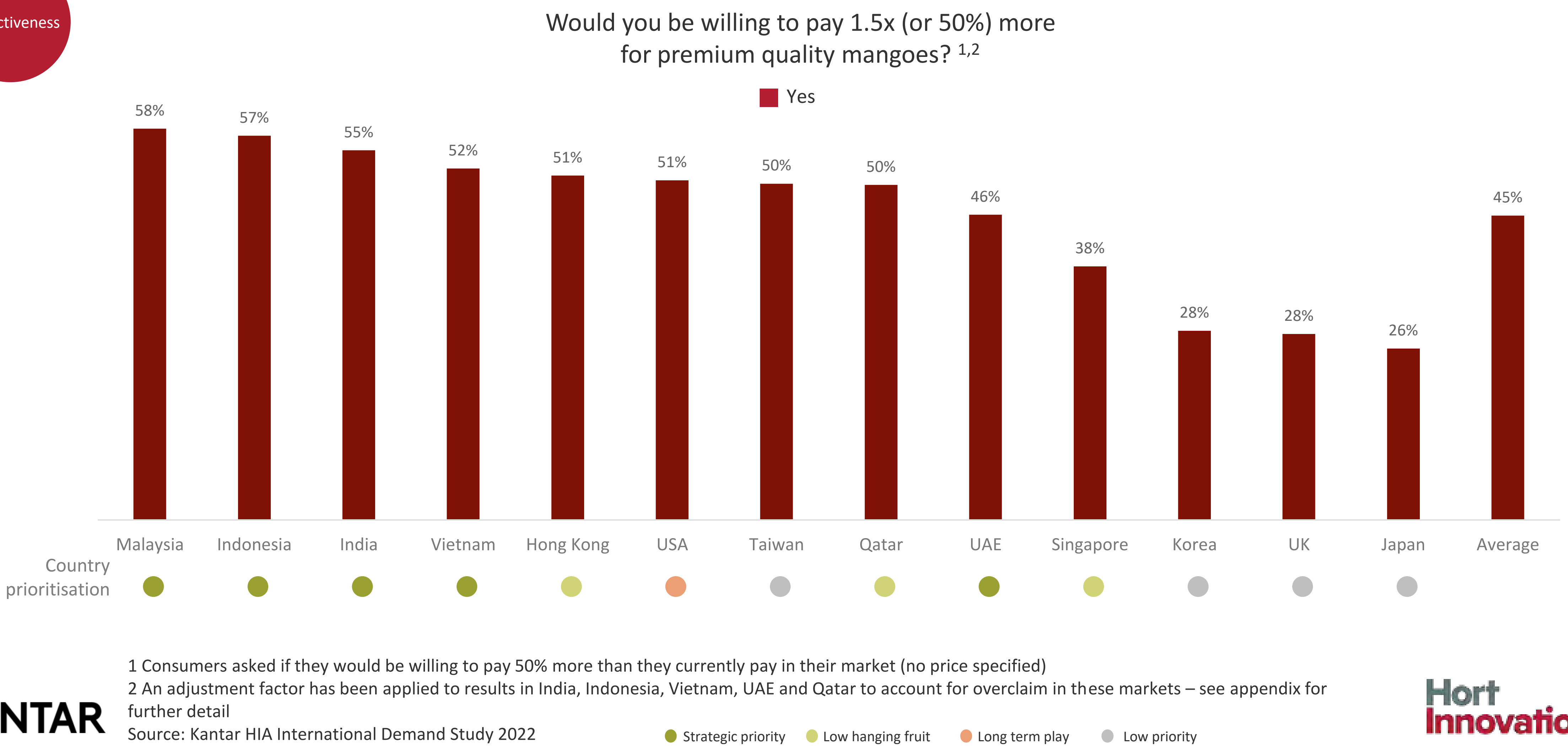
Hort Innovation

Across several markets mangoes have the potential to command a premium price

Mango

Attractiveness



1 Consumers asked if they would be willing to pay 50% more than they currently pay in their market (no price specified)
2 An adjustment factor has been applied to results in India, Indonesia, Vietnam, UAE and Qatar to account for overclaim in these markets – see appendix for further detail
Source: Kantar HIA International Demand Study 2022

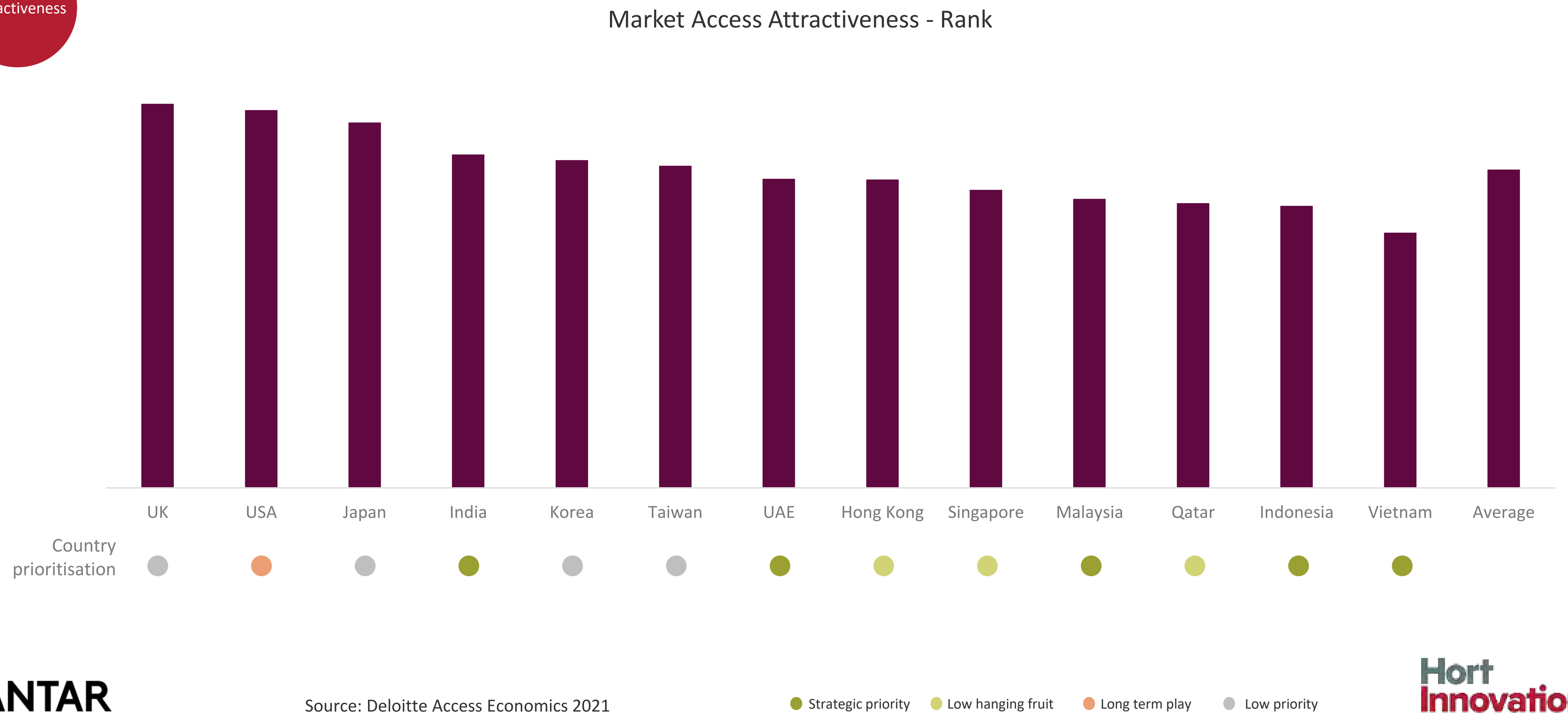
KANTAR

Hort Innovation

Although all markets are attractive, more affluent markets with larger populations rank more highly

Mango

Attractiveness



KANTAR

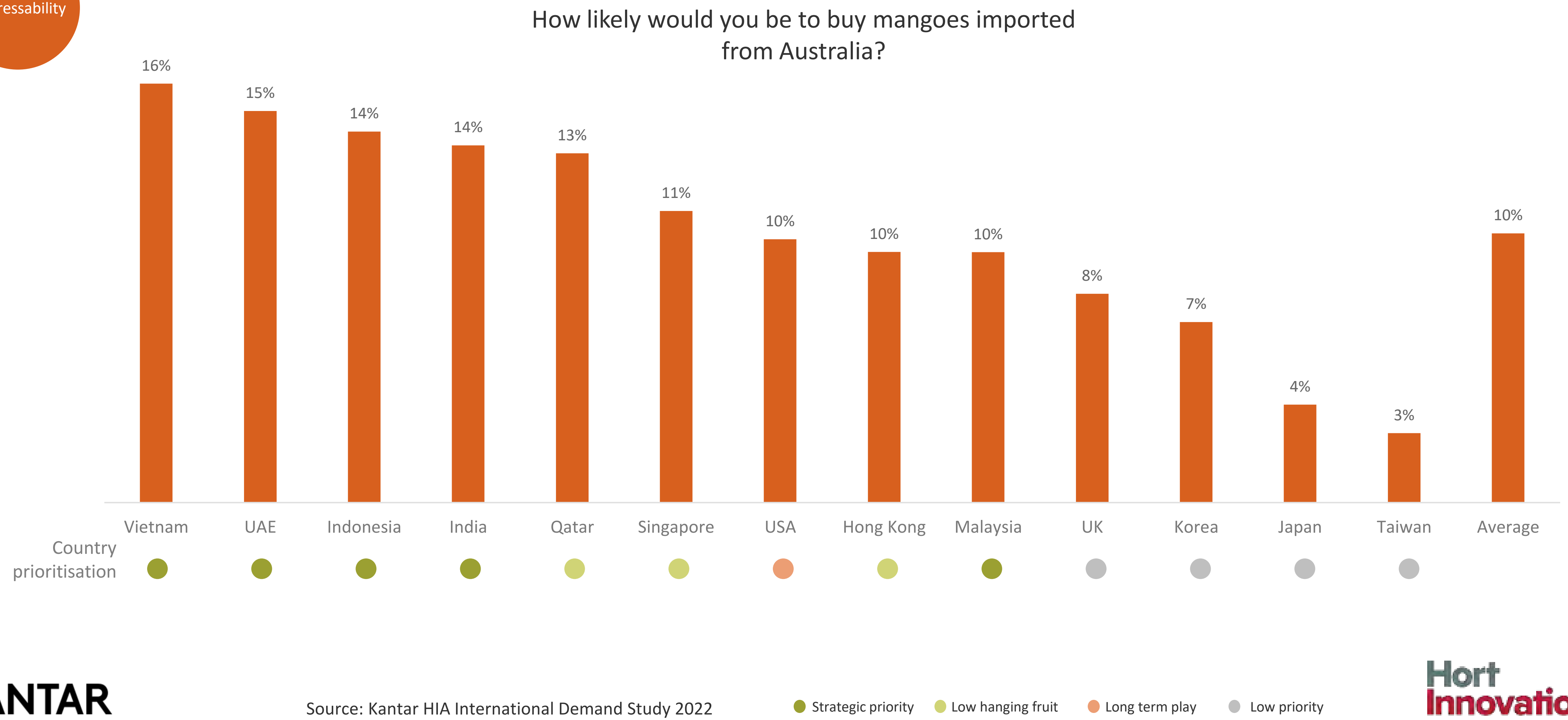
Source: Deloitte Access Economics 2021

Hort Innovation

Mangoes have moderate Australian appeal vs. other commodities, but it's strongest in Vietnam and the UAE

Mango

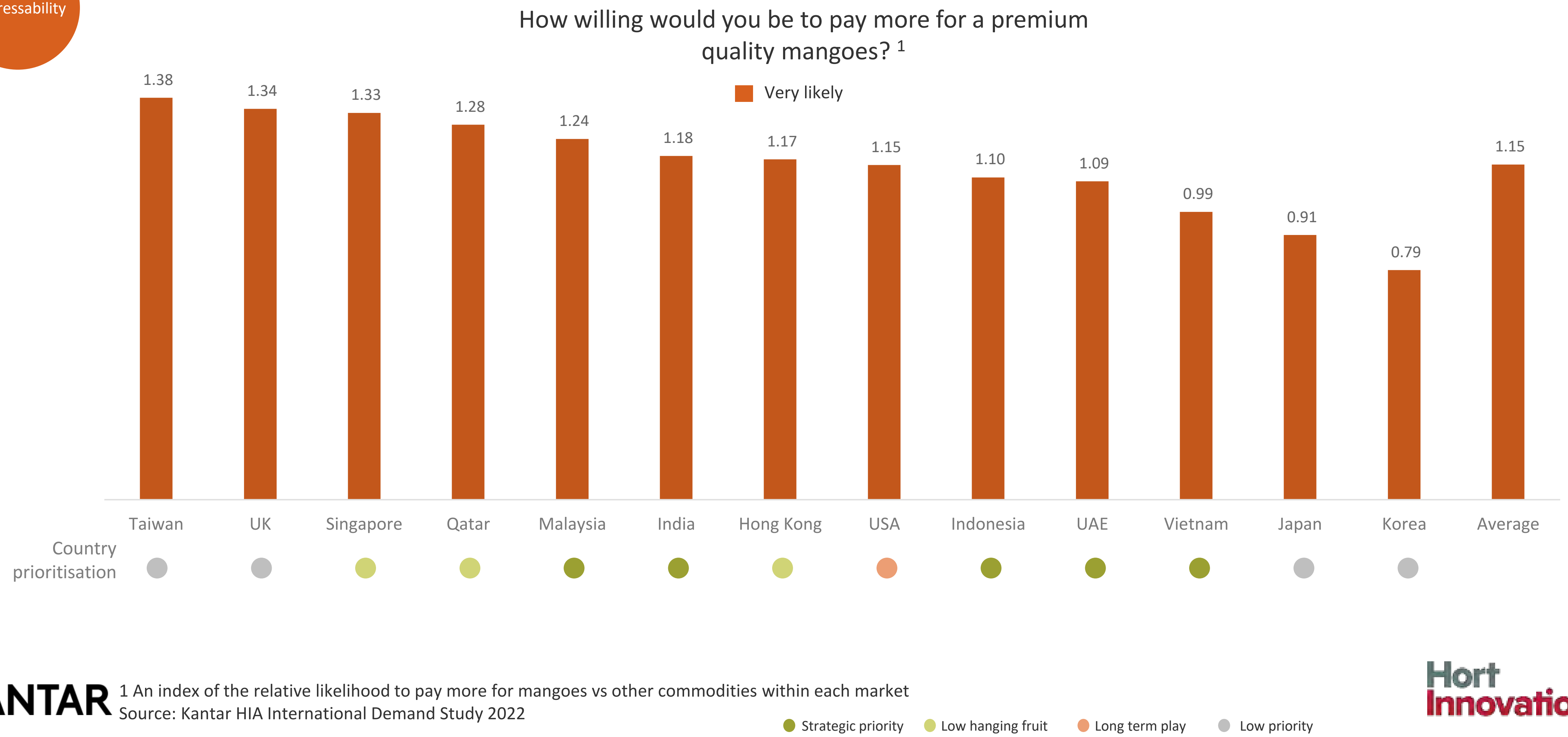
Addressability



Relative desire for premium vs other commodities is high, especially in Taiwan, the UK and Singapore

Mango

Addressability



1 An index of the relative likelihood to pay more for mangoes vs other commodities within each market
Source: Kantar HIA International Demand Study 2022

KANTAR Hort Innovation

Some markets rank as more addressable due to the ease of trade, market risk and value chain competitiveness

Source: Deloitte Access Economics 2021

KANTAR

3.7 Mango

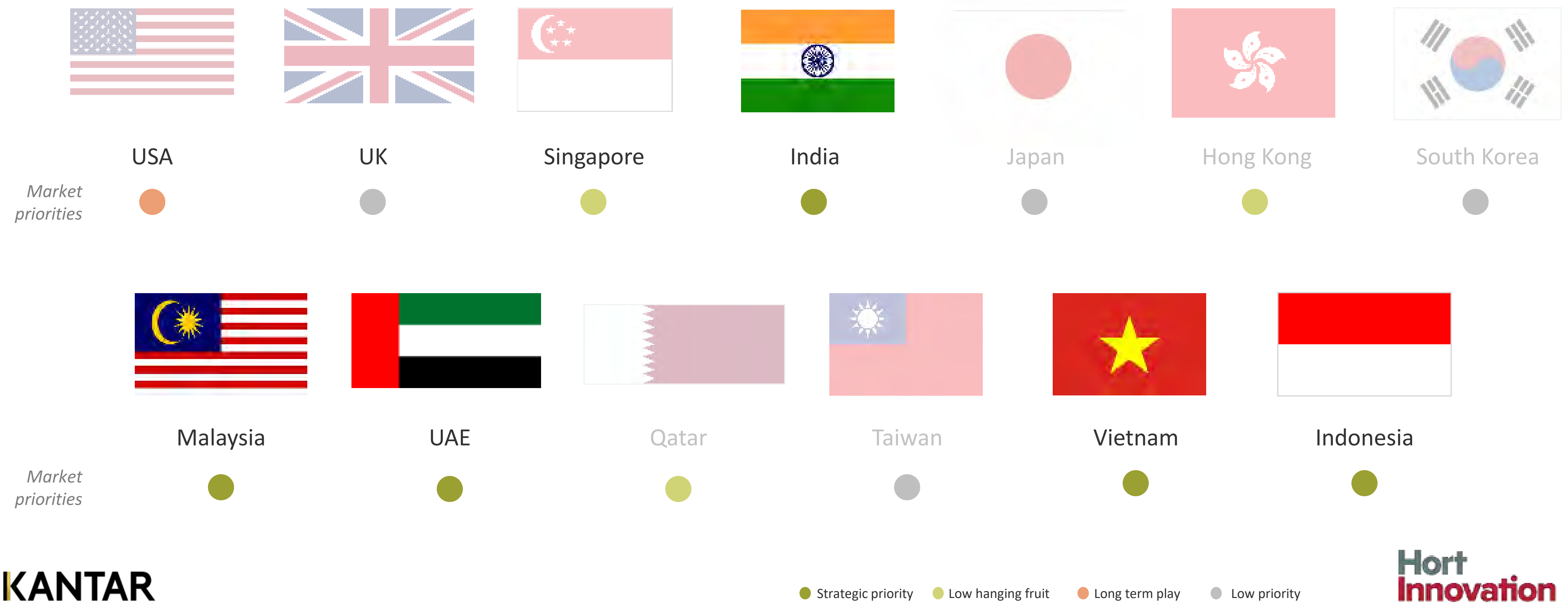
i. Market prioritisation
Leverage the strategic framework to prioritize markets based on consumer behaviour, perception and market access

ii. Commodity profiling
In-depth data profiling of how the commodity is consumed across markets, premium triggers and barriers

Hort Innovation

The prioritisation revealed x5 markets ripe for Mango export. The next section will deep dive into Mango consumption across markets

Mango



Mango consumption snapshot

Mango

	India	Malaysia	Vietnam	Indonesia	UAE
HOW OFTEN (P1W pen.)	28%	40%	44%	48%	38%
WHEN	Lunch Snack	Snack Dessert	Lunch Dinner	Lunch Snack	Snack
HOW	Fresh on its own	Fresh on its own	Fresh on its own	Fresh on its own As part of a snack	Fresh on its own
WHY	Tasty Indulgence	Tasty Indulgence	Tasty Indulgence Quick & Easy	Tasty Quick & Easy	Tasty Indulgence
WHERE	At home	At home	At Home	At home	At home
WHO WITH	With Family	With Family	With Family	With Family	With Family

Source: Kantar HIA International Demand Study 2022

Mango: Strategic Imperatives

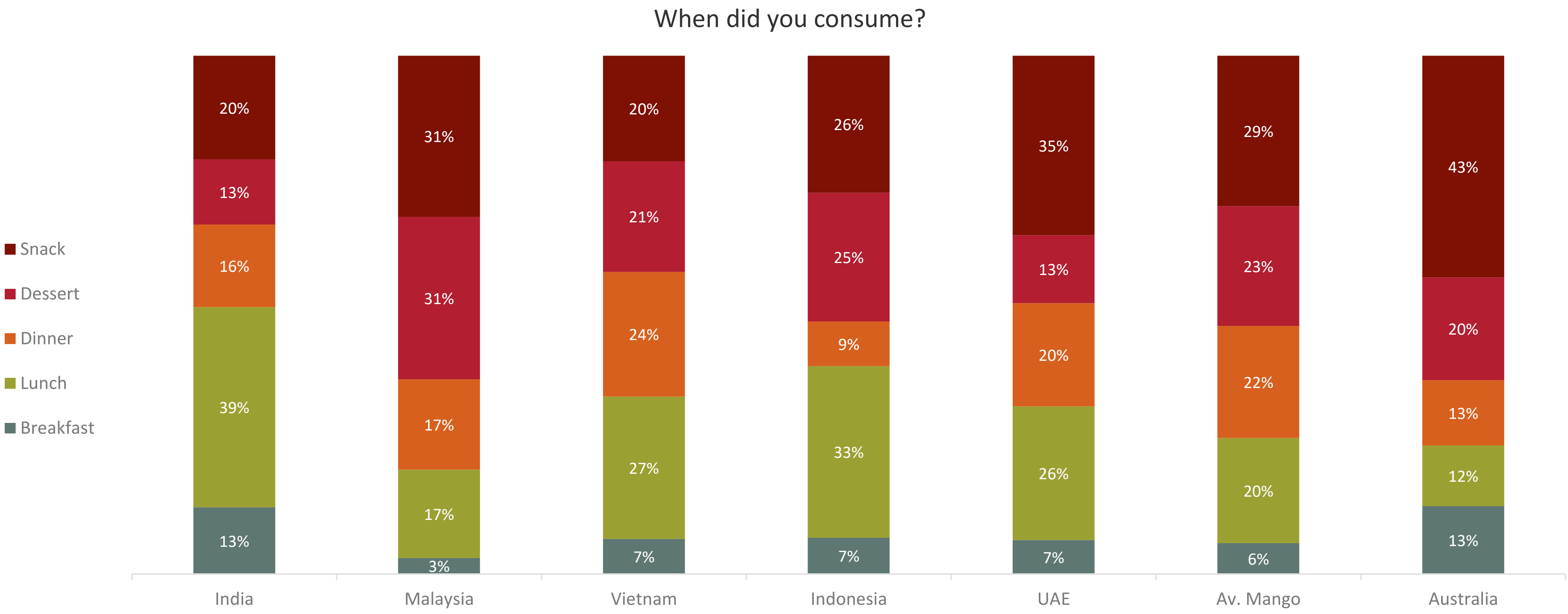
Mango

	India	Malaysia	Vietnam	Indonesia	UAE
CONSUMER PREFERENCES	As a tasty and indulgent lunch or snack, fresh on its own, at home with family	As a tasty and indulgent snack or dessert, fresh on its own, at home with family	As a tasty, indulgent and easy lunch or dinner, fresh on its own, at home with family	As a tasty, quick and easy snack/lunch, fresh on its own or as part of a snack, at home with family	As a tasty and indulgent snack between lunch and dinner, fresh on its own, at home with family
NEEDS TO SATISFY	Tasty Indulgence	Tasty Indulgence	Tasty Indulgence	Tasty	Tasty Indulgence
FUNCTIONAL ATTRIBUTES	Sweet Refreshing Taste	Sweet Refreshing Taste	Refreshing Taste Sweet	Sweet Fresh & Light	Sweet Refreshing Taste
PREMIUM OPPORTUNITY	Fresher Sweeter	Fresher Sweeter	Fresher Ripeness Sweeter	Fresher Sweeter Ripeness	Fresher Sweeter
BARRIERS TO OVERCOME	Too expensive	Too expensive	Bruises easily	Other Exciting alternatives	Too expensive Poor quality
KEY SUBSTITUTES	Apples Bananas	Apples Bananas	Apples Bananas	Apples Bananas	Fruiting Vegetables Nuts and Seeds

Source: Kantar HIA International Demand Study 2022

Mangos are most commonly consumed as a snack across markets as well as dessert in Malaysia or lunch in other priority markets

Mango



KANTAR

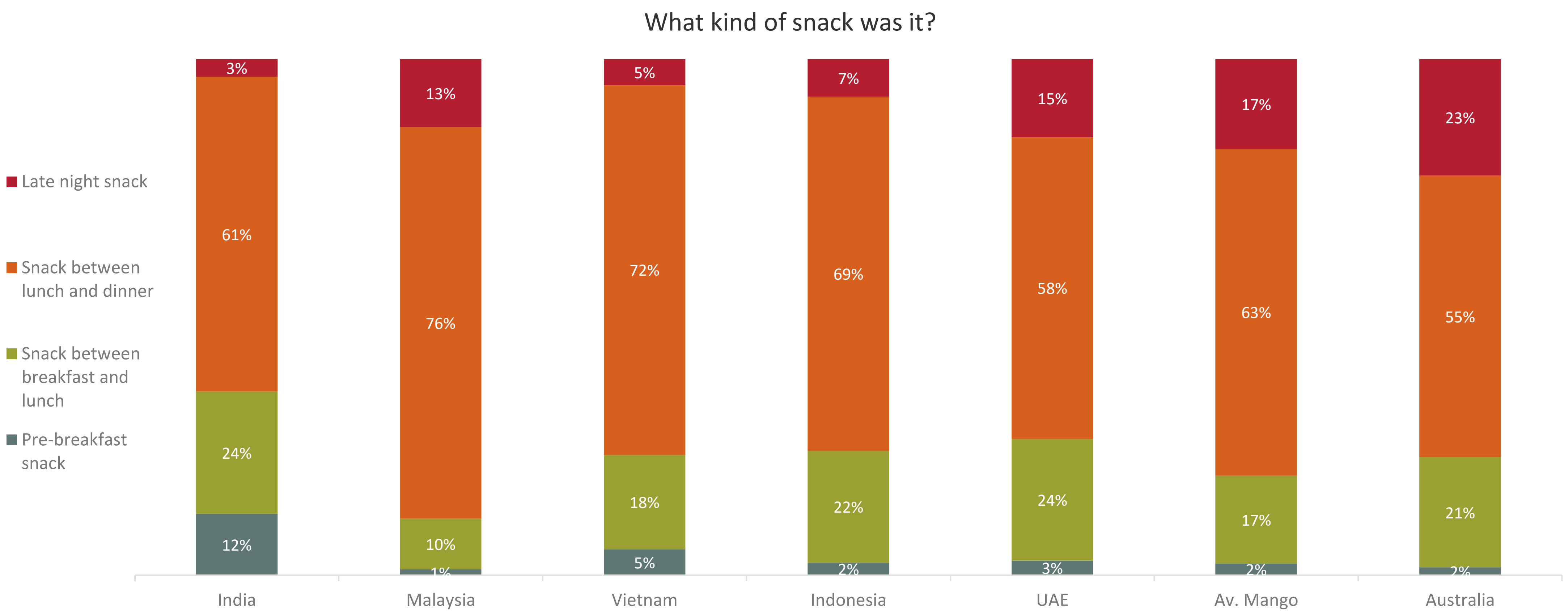
Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	296	295	301	301	293	218	295	295	314	306	40

Hort Innovation

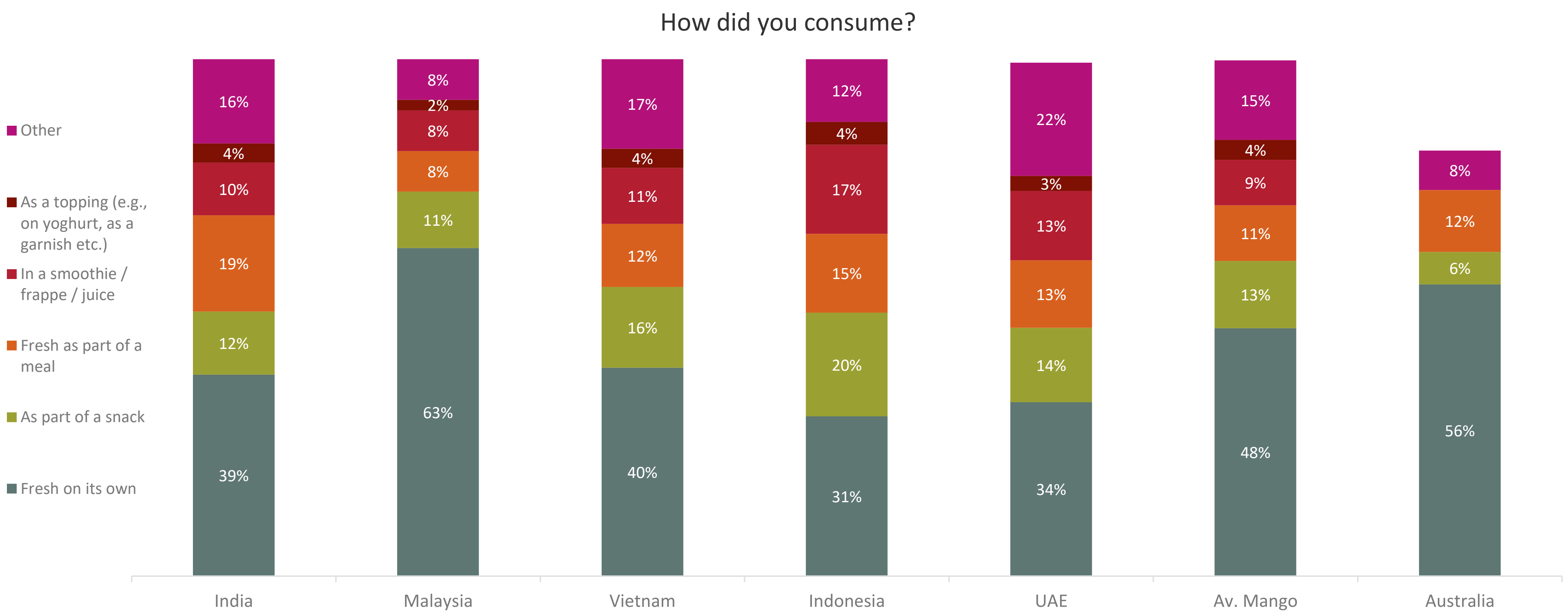
When consumed as a snack, Mangos are consumed between lunch and dinner

Mango



Source: Kantar HIA International Demand Study 2023

Mangos are consumed fresh on their own, especially in Malaysia or as part of a snack or meal



'Other' = In a salad, Cooked on its own, As an ingredient in cooking, For decoration / show only, To make baby food / puree, As an ingredient in baking, As part of an alcoholic drink e.g. cocktail and Don't know

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	296	295	301	301	293	218	295	295	314	306	40

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Hort Innovation

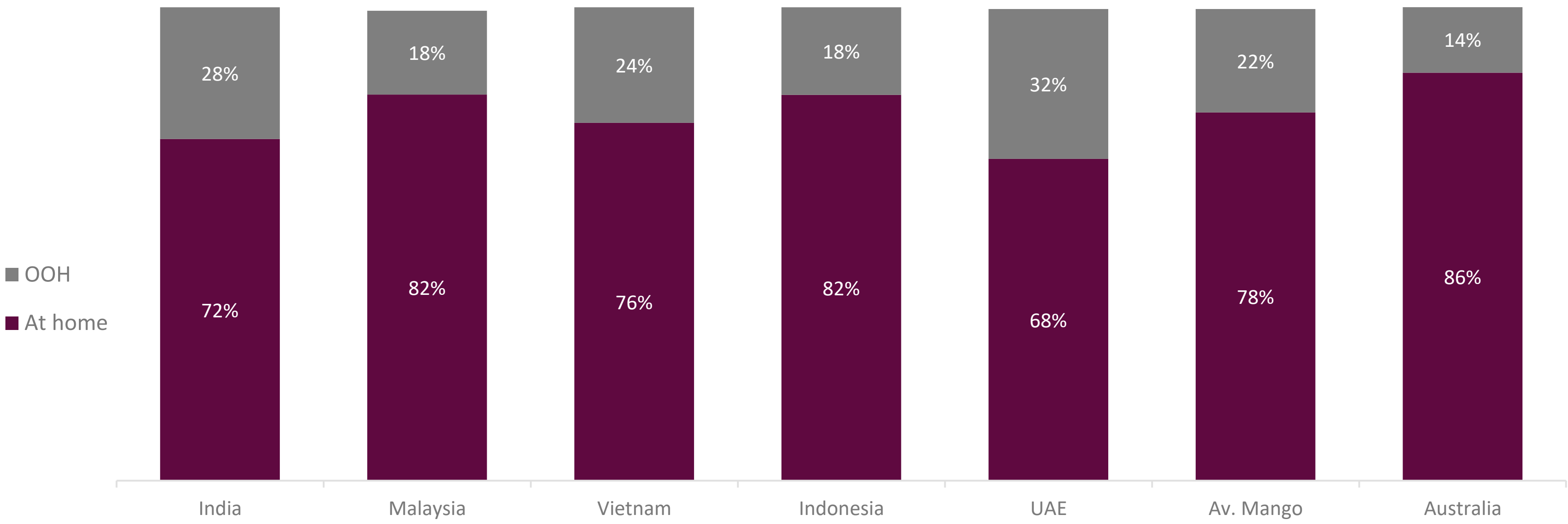
Most people consume Mango at home. UAE skews more out of home

Mango

Where were you?

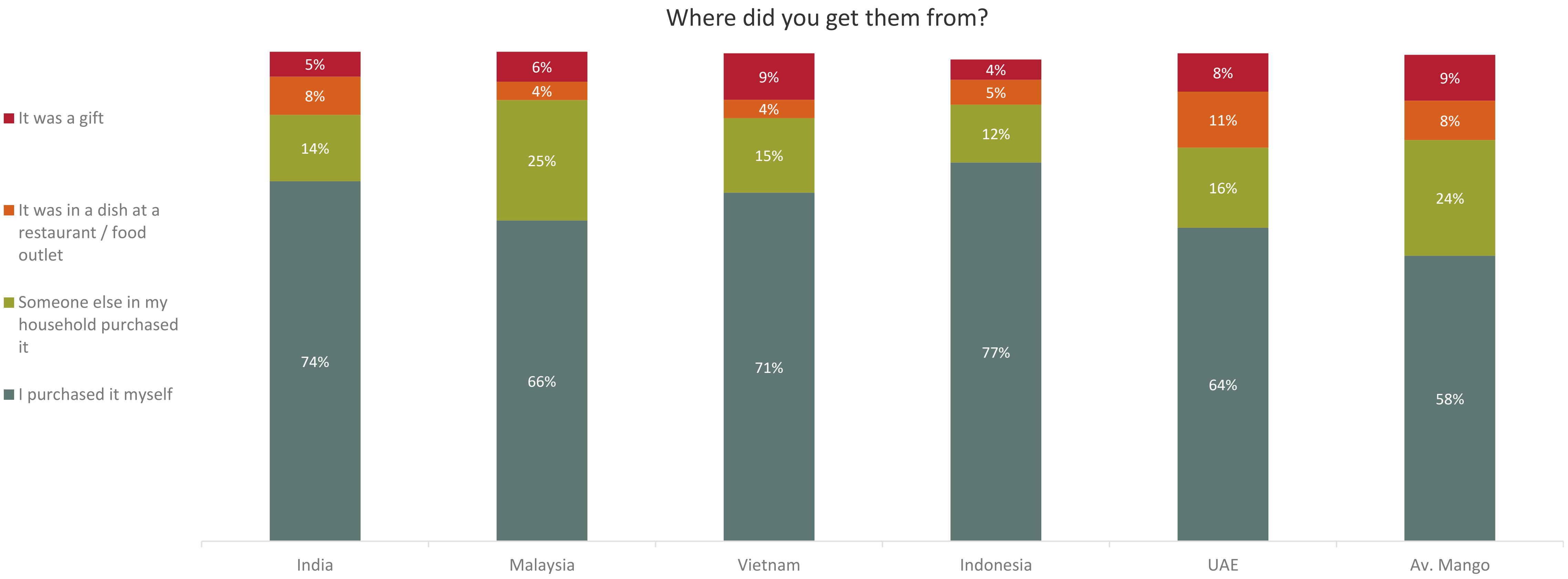
78%

Of consumption of mangoes is in the home, this varies only slightly by market



Most people purchase Mangos themselves

Mango



KANTAR

Source: Kantar HIA International Demand Study 2023

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	292	300	296	295	301	301	293	218	295	295	314	306	40

Hort Innovation

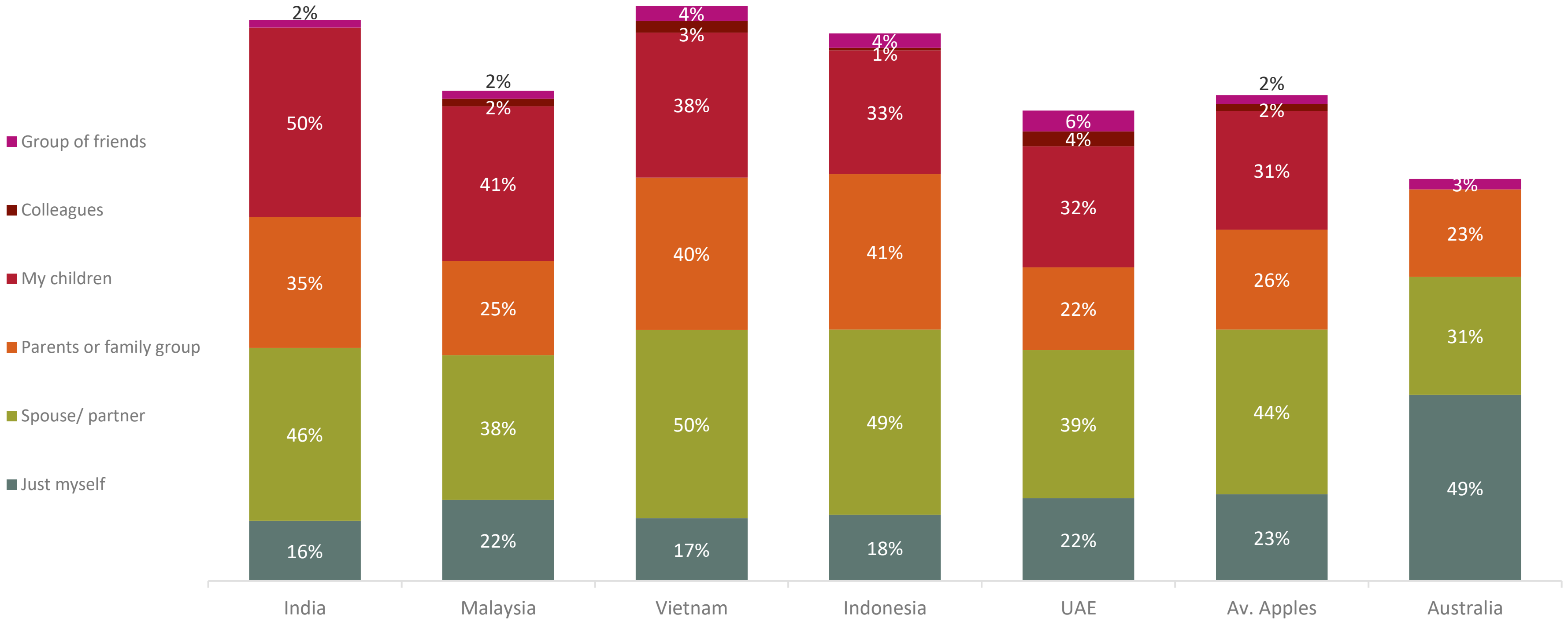
Mangos are typically consumed with a spouse or partner or with a broader family group

Mango

Who were you with?

44%

Of consumption of mangoes (on average) is with a spouse/partner.



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	292	300	296	295	301	301	293	218	295	295	314	306	40

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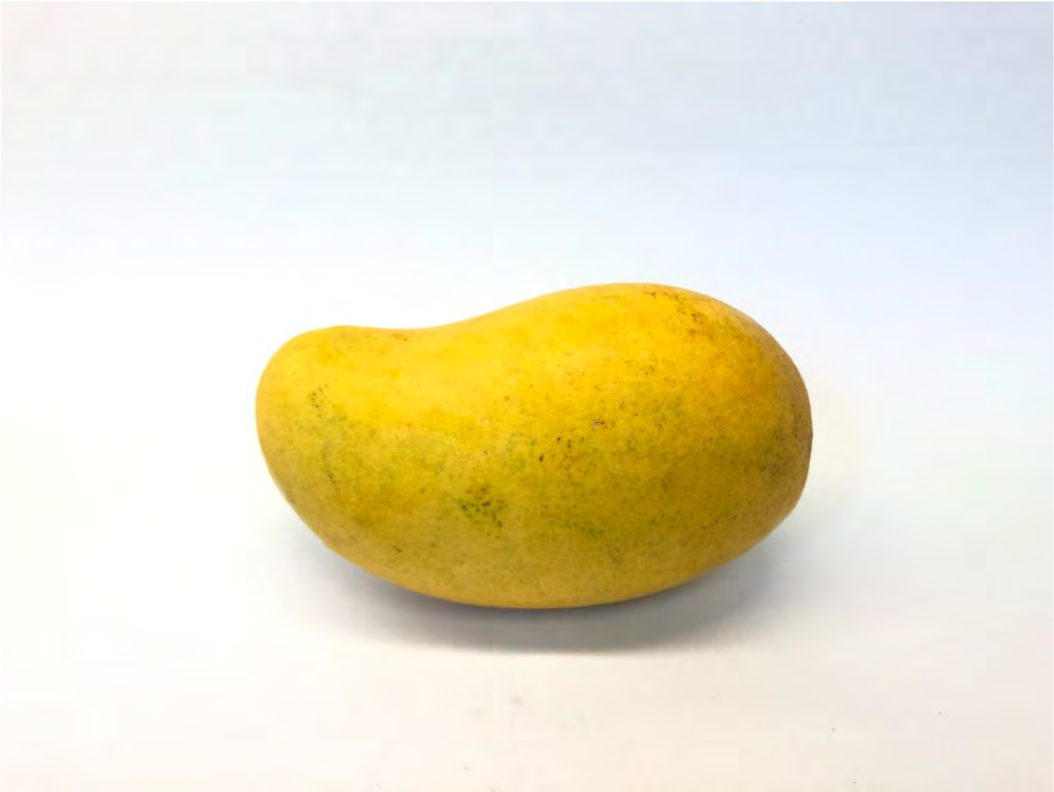
Hort Innovation

There is a range of reasons why people choose to eat different fruits & vegetables. There are
6 universal consumer needs pillars that drive this choice for consumers globally



The 6 needs pillars are universal across commodities and global markets

Tasty

All about: Taste, Refreshment, and Enjoyment

Quick & Easy

All about: Convenience Simplicity, and Ease

Healthy & Nutritious

All about: Guilt-free, Nourishing and Sensible

Indulgence

All about: Comfort, Relaxation and Self Care

Physical & Mental Energy

All about: Energy, Uplift, and Reinvigoration

Connection

All about: Bonding, Celebration and Creating Memories

In priority markets, the most important reasons why people choose to consume Mangoes are for something tasty, indulgent and for a connection

68%

of people in priority markets consume Mangoes for something

Tasty

48%

of people in priority markets consume Mangoes for something

Indulgent

36%

of people in priority markets consume Mangoes for a

Connection

Taste is the most important consumption driver across priority markets, followed by Indulgence and Quick & Easy in Indonesia

Mango

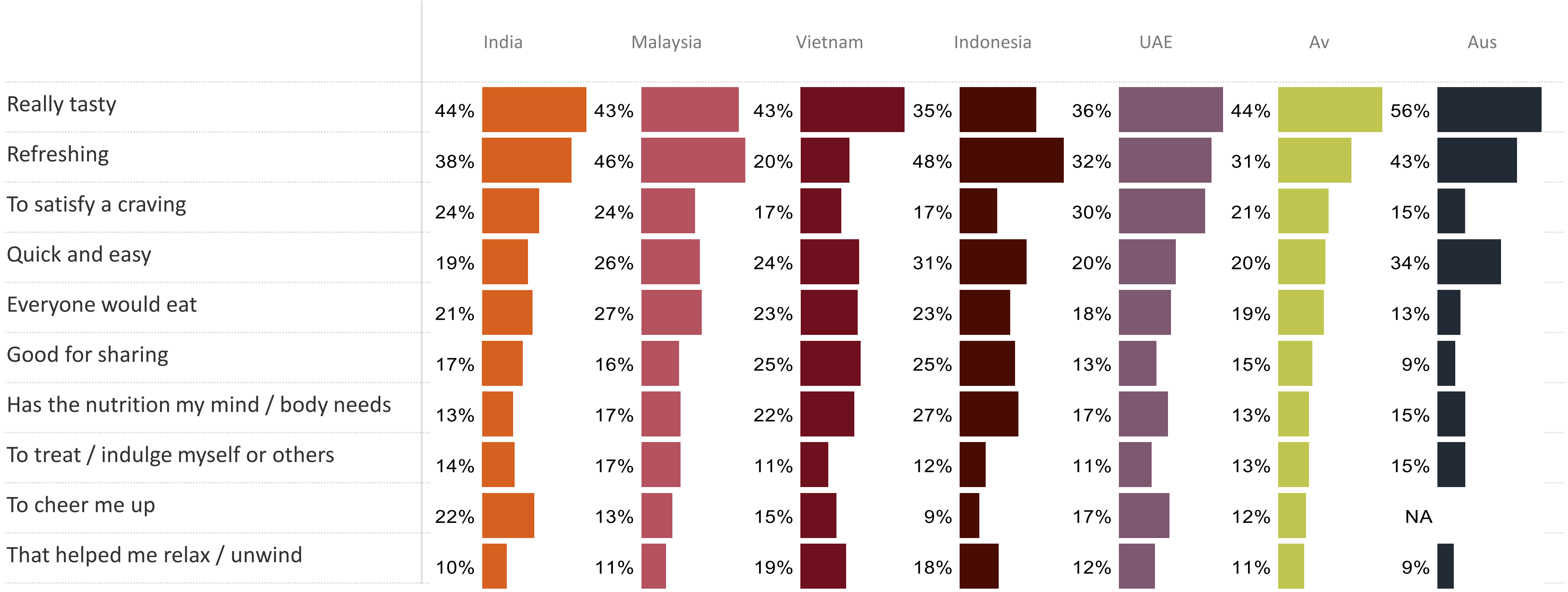
Which were important when choosing to consume?

	India	Malaysia	Vietnam	Indonesia	UAE	Av	Aus
Tasty	67%	76%	62%	73%	61%	67%	73%
Quick & Easy	41%	45%	47%	47%	42%	39%	51%
Healthy & Nutritious	31%	29%	38%	45%	33%	25%	27%
Indulgence	48%	50%	47%	43%	51%	44%	37%
Physical & Mental Energy	32%	21%	28%	27%	28%	21%	18%
Connection	42%	24%	42%	38%	35%	29%	20%

Specifically, consumers for taste and refreshing. In India, Malaysia and UAE they can also satisfy cravings

Mango

Which were important when choosing to consume?



More functionally, consumers are looking for Mangoes that are fresh and light with a sweet, refreshing taste

39%

of people in priority markets are looking for Mangoes that are

Sweet

33%

of people in priority markets are looking for Mangoes that have

Refreshing taste

27%

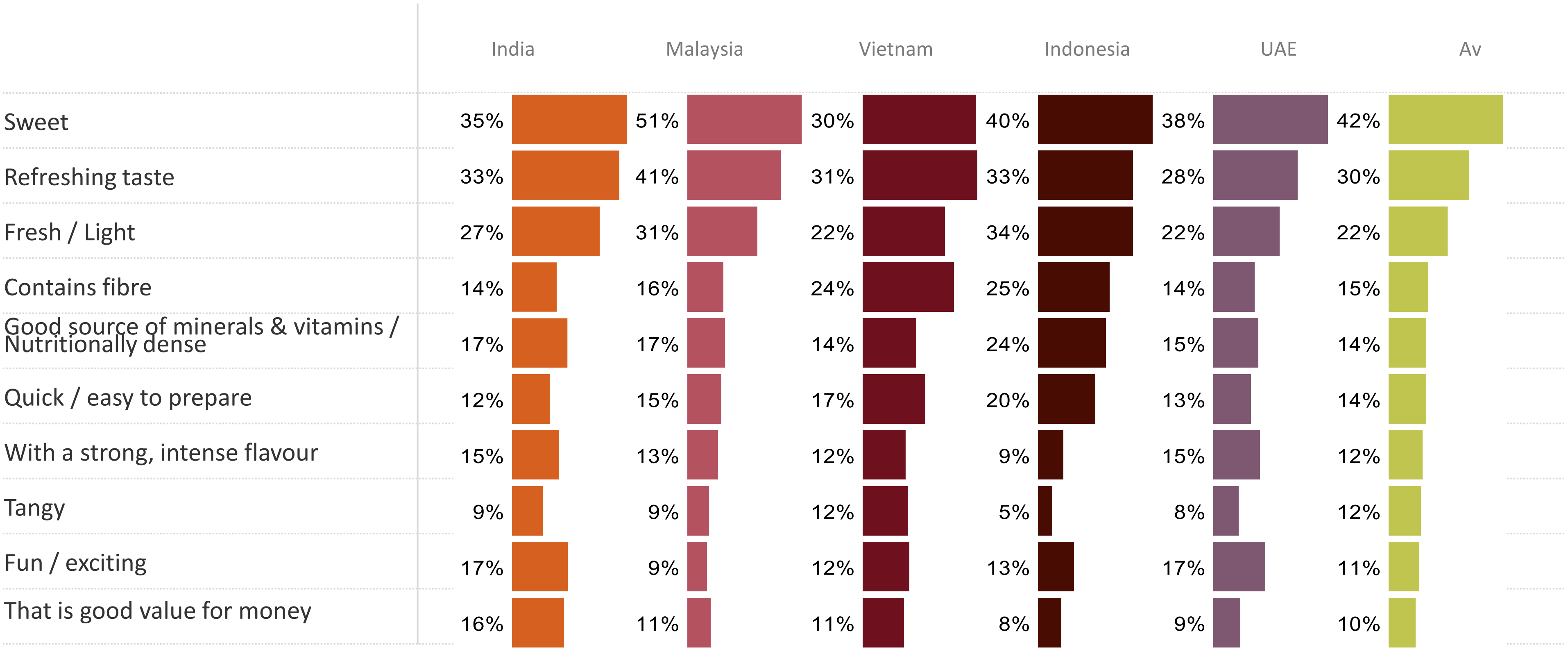
of people in priority markets are looking for Mangoes that are

Fresh / Light

Consumers are looking for Mangos that are sweet, have refreshing taste and are fresh and light

Mango

What were you looking for when you consumed?



KANTAR

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Hort Innovation

When it comes to the premium opportunity, consumers are looking for Mangoes that are fresher, sweeter, free from pesticides, and are in the right state of ripeness

49%

of people in priority markets are looking for premium Mangoes that are

Fresher

40%

of people in priority markets are looking for premium Mangoes that are

Sweeter

30%

of people in priority markets are looking for premium Mangoes that are

Free from pesticides

30%

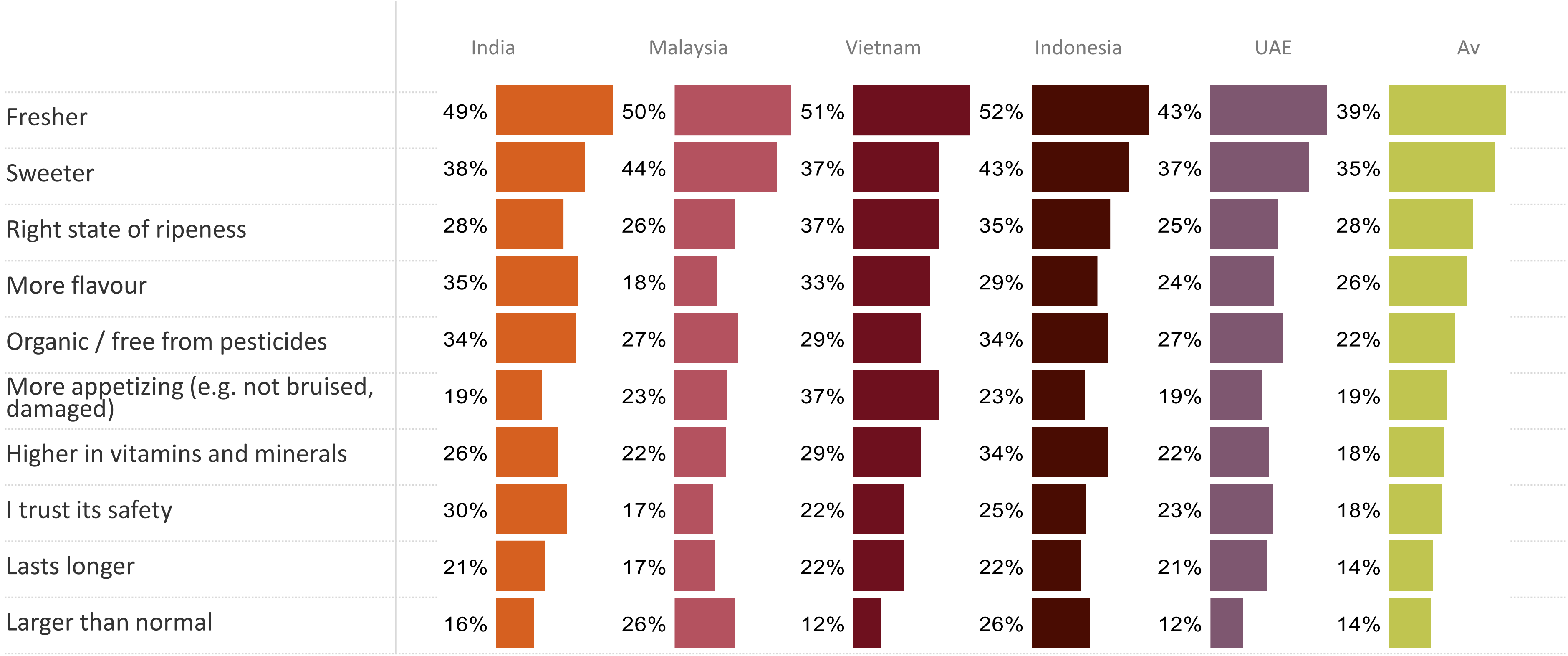
of people in priority markets are looking for premium Mangoes that are

In the right state of ripeness

Premium Mangos are characterised by freshness, sweetness and state of ripeness across priority markets. In Vietnam consumers also look for more appetizing

Mango

What does premium quality mean to you?



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Hort Innovation

Price is the biggest barrier to overcome with Mango consumption, followed by bruising easily and being too messy to eat.

Bananas, apples and melons are considered worthy substitutes

Barriers to Consumption

Price	Bruise Easily	Too messy
21% (priority market average)	20% (priority market average)	19% (priority market average)

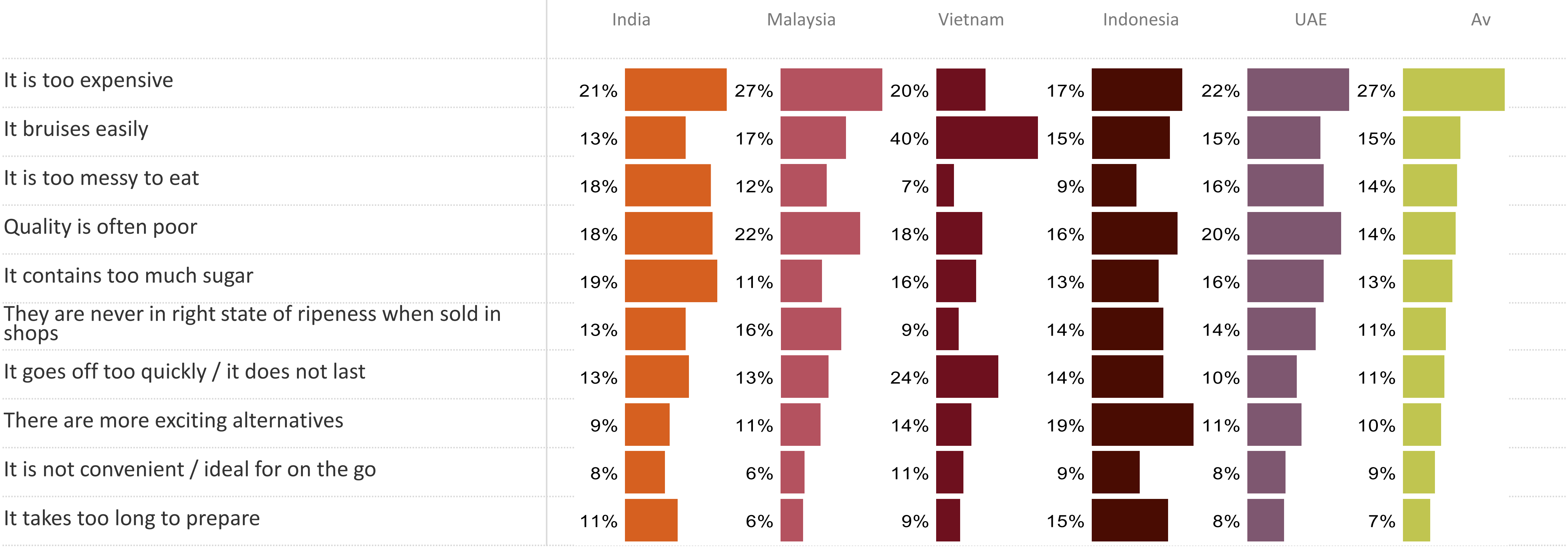
Leading Substitutes

Banana	Apple	Melon
42% (priority market average)	40% (priority market average)	27% (priority market average)

Price is a key barrier across priority markets except Vietnam where bruises easily is a key barrier. In Indonesia, more exciting alternatives is also a barrier

Mango

What are the reasons you may not choose?



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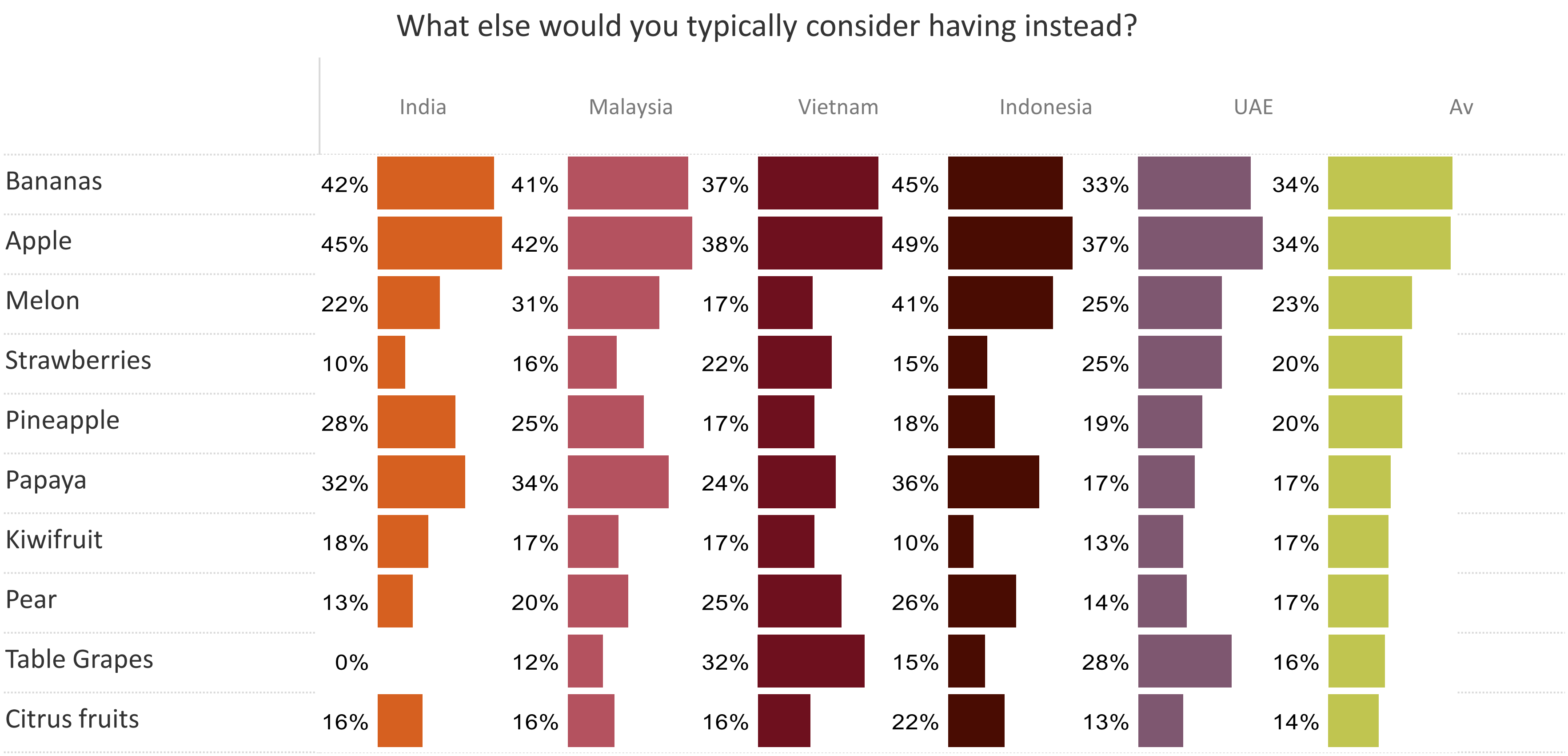
Hort Innovation

In priority markets, Bananas, Apples and Papaya are key substitutes along with Melons in Malaysia and Indonesia

Mango



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N=	292	300	296	295	301	301	293	218	295	295	314	306	40

Recommendation: How to drive growth in Australian Mangoes

Mango

1. Focus on Strategic Priority Markets

Focus on markets where consumers are **willing to pay a premium** for quality Mangoes (ie. **Indonesia, Vietnam, UAE, Malaysia, India**). Leverage already **high appeal for Australian Mangoes in Indonesia, Vietnam, UAE and India**, and **improve appeal in Malaysia** to drive incremental growth in Australian Mango exports.

2. Deliver Core Consumer Needs

Deliver the core consumer needs across priority markets with Mangoes that have a **refreshing taste**, and **are an indulgence that are good for sharing**. Ensure Mangoes are at or above par for being **sweet, fresh and light, that serve as a snack, lunch or dessert.**

3. Leverage Premium Advantage

Maximise the premium opportunity by delivering Mangoes that are fresher, sweeter, are free of pesticides, and are in the right state of ripeness

4. Reduce Consumption Barriers

Address perceptions that Mangoes are **too expensive, bruise easily** and **are too messy**, to minimise consumer drift to close substitutes like Bananas, Apples and Melons**.**

'Where to Play'

← ***'How to Win'*** →

KANTAR

3.8

Melon

i. Market prioritisation

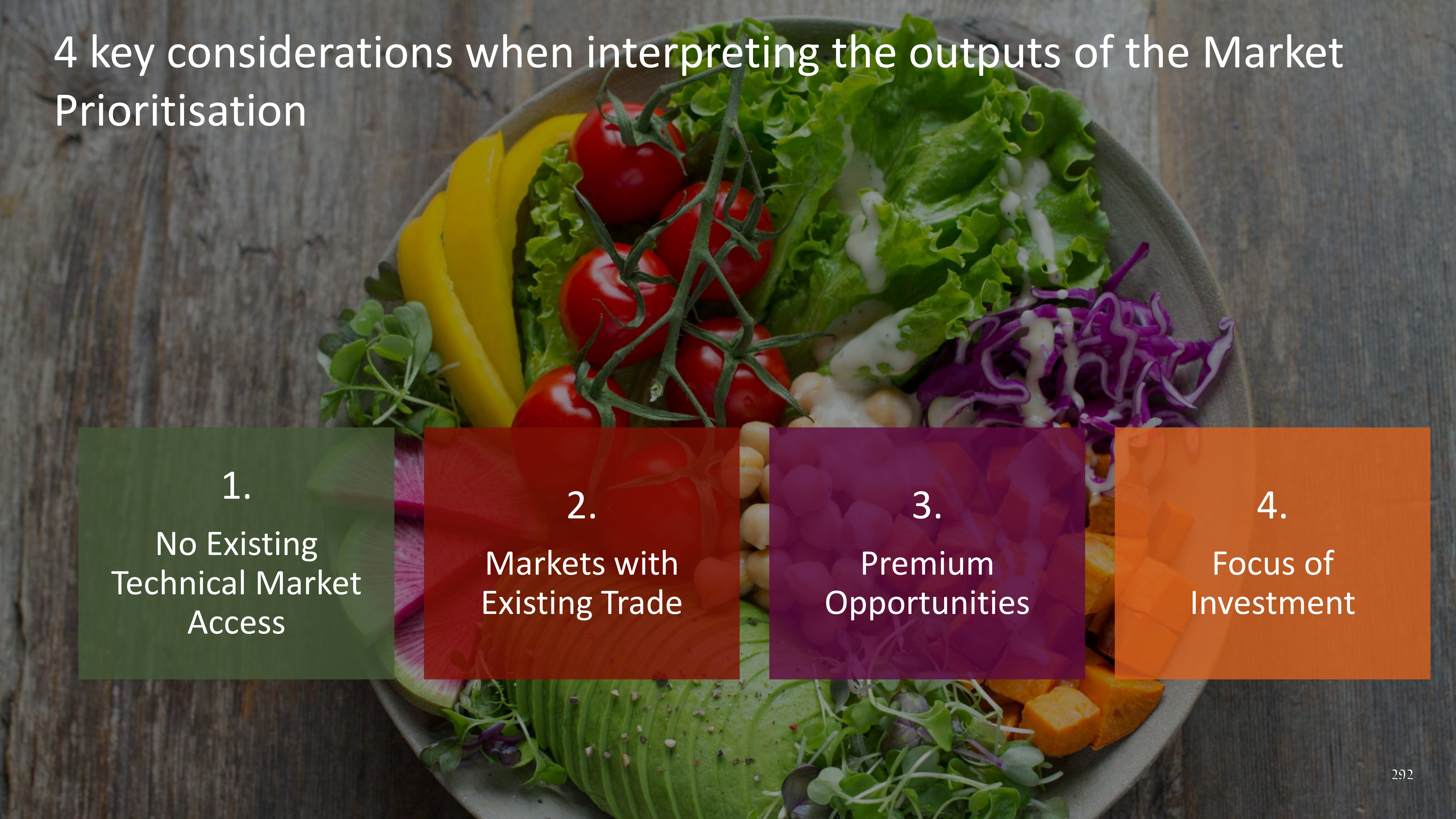
Leverage the strategic framework to prioritize markets based on consumer behaviour, perception and market access

ii. Commodity profiling

In-depth data profiling of how the commodity is consumed across markets, premium triggers and barriers

Hort Innovation

4 key considerations when interpreting the outputs of the Market Prioritisation



1.
No Existing Technical Market Access

2.
Markets with Existing Trade

3.
Premium Opportunities

4.
Focus of Investment

1. No Existing Technical Market Access

Existing technical market access for a commodity was **intentionally NOT included** in the evaluation of addressability

Rationale:

- This project was designed to identify attractive and addressable **future** growth geographies therefore the analysis was not restricted by current arrangements
- This research is intended to **support and inform industry** decisions regarding the progress of any potential future or ongoing market access or market improvement request

2. Markets with Existing Trade

While the addressability calculation includes data on general market access and trade, it intentionally does not include whether Australia currently trades in a particular commodity

Rationale:

- The objective of this analysis is to provide an objective assessment of whether a market is attractive and addressable independent of current arrangements
  - If a market that we are currently trading with for a particularly commodity is shown NOT to be a ‘Strategic Priority’, this does NOT mean that we should consider withdrawing from this market.
  - However, we recommend re-evaluating the relative focus of investment in this market, and consider other markets when looking for **future** growth opportunities

3. Premium Opportunity

In evaluating attractive and addressable export markets, we have intentionally used data that shows where premium opportunities can be found

Rationale:

- The overall objective of this project was to identify **profitable** growth opportunities for commodities in the future, and Australian commodities will have more chance of growing profitably where they have a better chance for commanding a price premium
  - High commodity penetration in a market has also been used to evaluate attractiveness, but this analysis favours markets where there is a larger opportunity for Australian products to command a **premium**.

4. Focus of Investment

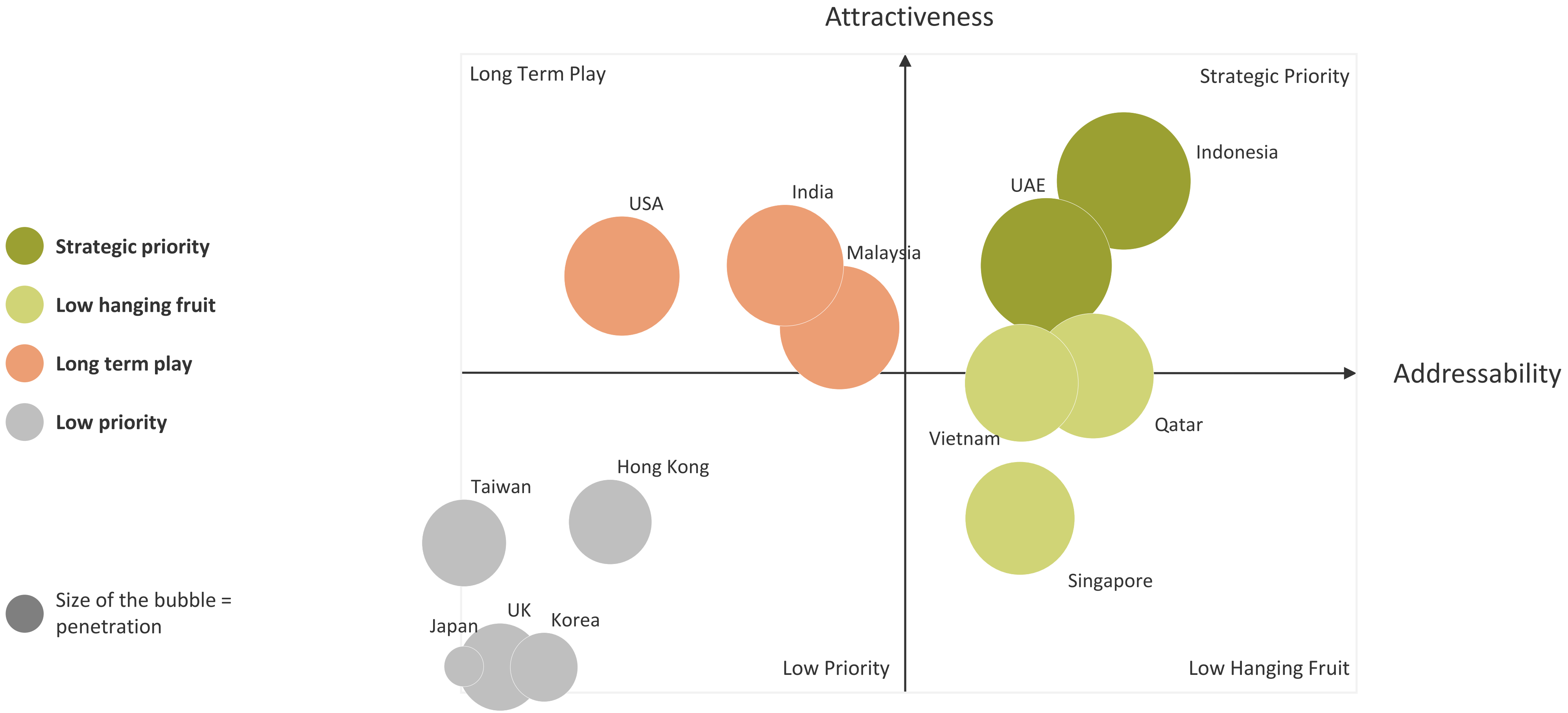
The evaluation and prioritisation of export markets into the 4 quadrants of attractiveness and addressability **is intended to be only one input into decision making** about **where to focus investment**

Rationale:

- The objective of this project was primarily to offer a consumer lens into commodity consumption, to enable export decisions to be informed by more robust consumer data (while still included additional market factor data from previous Deloitte analysis)
  - Export decisions should be made using all available information including the economics of local growers and exporters and this report forms one input into that decision process

We have identified 2 strategic priority markets that represent the most attractive and appealing export opportunity for Australian melons

Melon



Source: Kantar HIA International Demand Study 2022, World Bank 2021

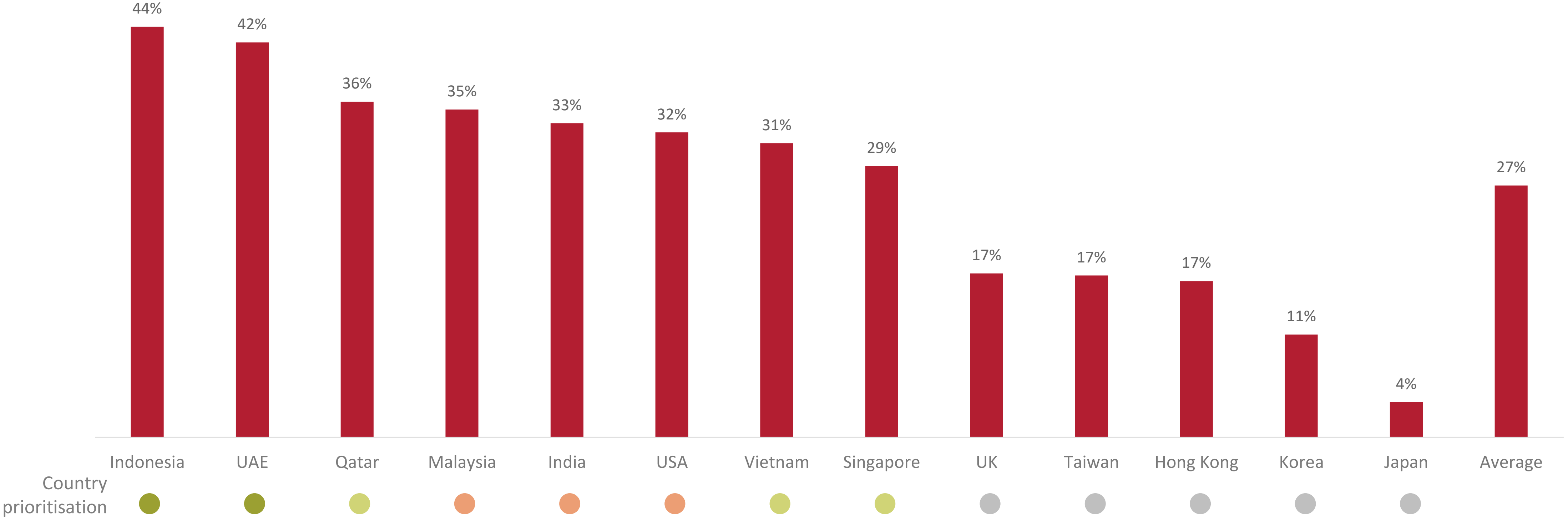
Melon: Summary of Strategic Priorities

Melon

	Indonesia	UAE
STRATEGIC IMPLICATIONS	There's high penetration of melons in Indonesia, which makes this a strong opportunity for export. People claim a willingness to pay for premium and Australian appeal is high	UAE also has strong penetration and a moderate willingness to pay more. Australian appeal is strong, as is the export opportunity to this market
ATTRACTIVENESS	• Most highly penetrated melon market where nearly half of people consume weekly • Strongest market for willingness to pay 1.5x more for premium quality melons	• Also very strong penetration, 42% consume melons weekly • Moderate willingness to pay more, but a significantly higher income per capita market
ADDRESSABILITY	• Strong Australian appeal • Moderate premium appeal vs. other commodities in Indonesia	• Strong Australian appeal • Moderate premium appeal vs. other commodities in Indonesia

Melons are most frequently consumed in Indonesia, the UAE and Qatar with at least 1 in 3 people in these markets consuming them weekly

Attractiveness



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Source: Kantar HIA International Demand Study 2022

Strategic priority   Low hanging fruit   Long term play   Low priority

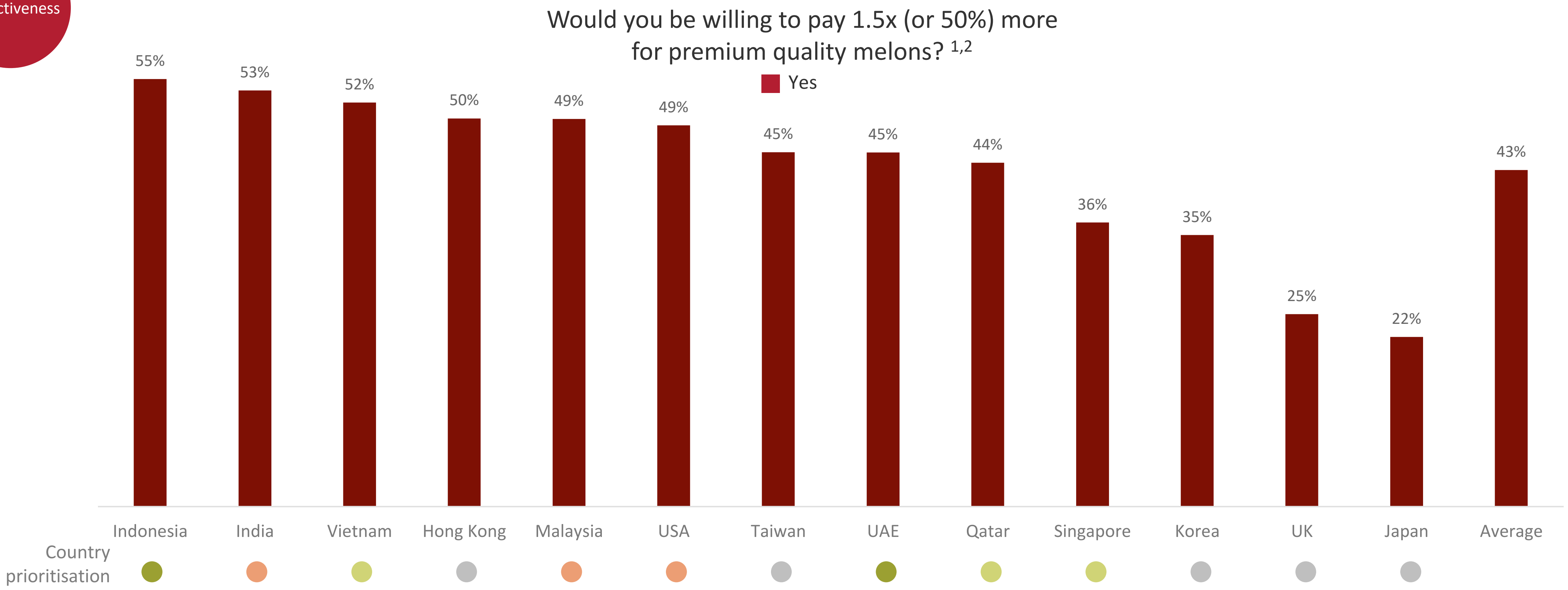
KANTAR

Hort Innovation

Across most markets melons have the potential to command a premium price

Melon

Attractiveness



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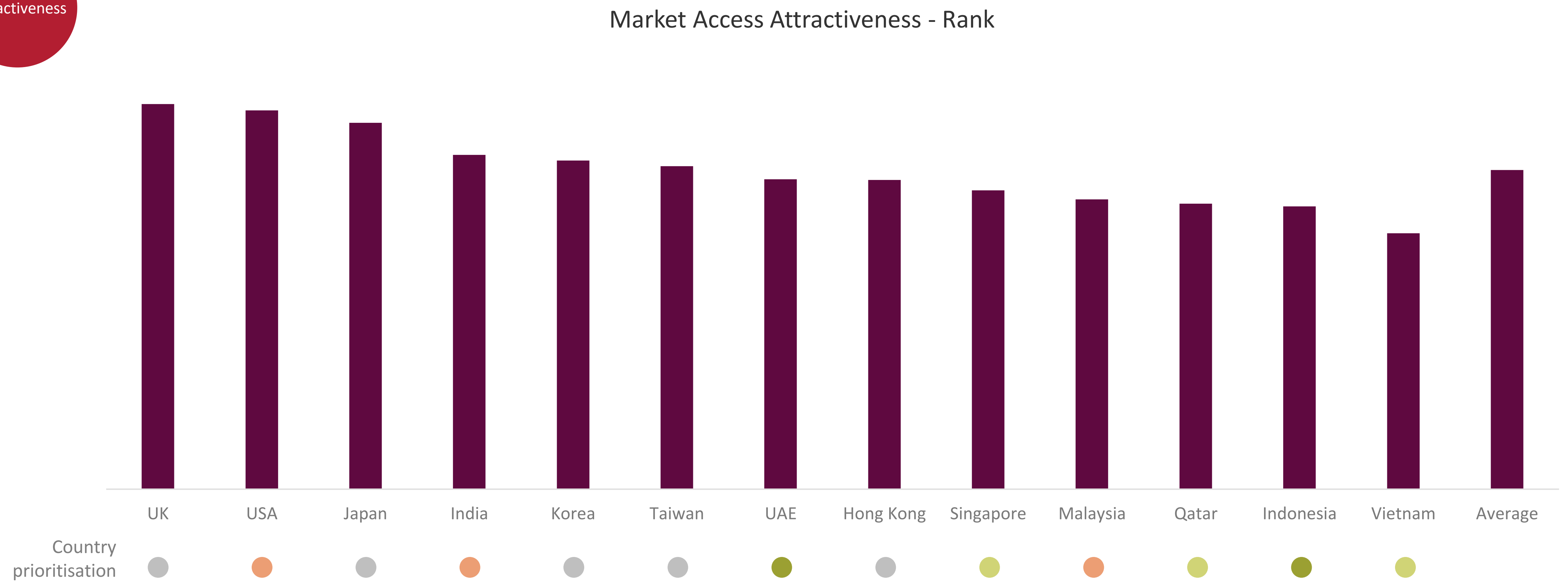
2 An adjustment factor has been applied to results in India, Indonesia, Vietnam, UAE and Qatar to account for overclaim in these markets – see appendix for further detail
Source: Kantar HIA International Demand Study 2022

Strategic priority Low hanging fruit Long term play Low priority

Although all markets are attractive, more affluent markets with larger populations rank r highly

Melon

Attractiveness



KANTAR

Source: Deloitte Access Economics 2021

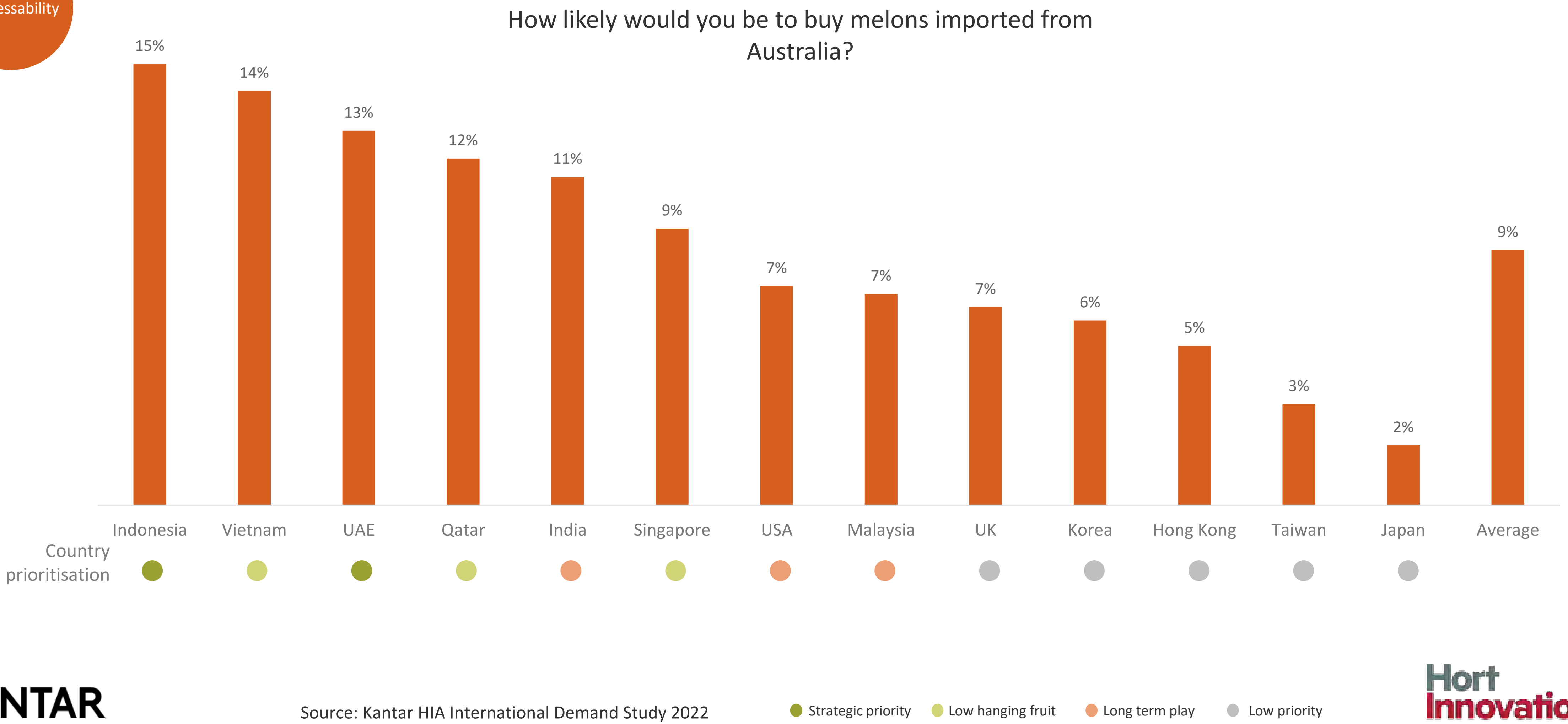
Strategic priority | Low hanging fruit | Long term play | Low priority

Hort Innovation

Melons have moderate Australian appeal, but it's particularly higher in Indonesia, Vietnam and the UAE

Melon

Addressability



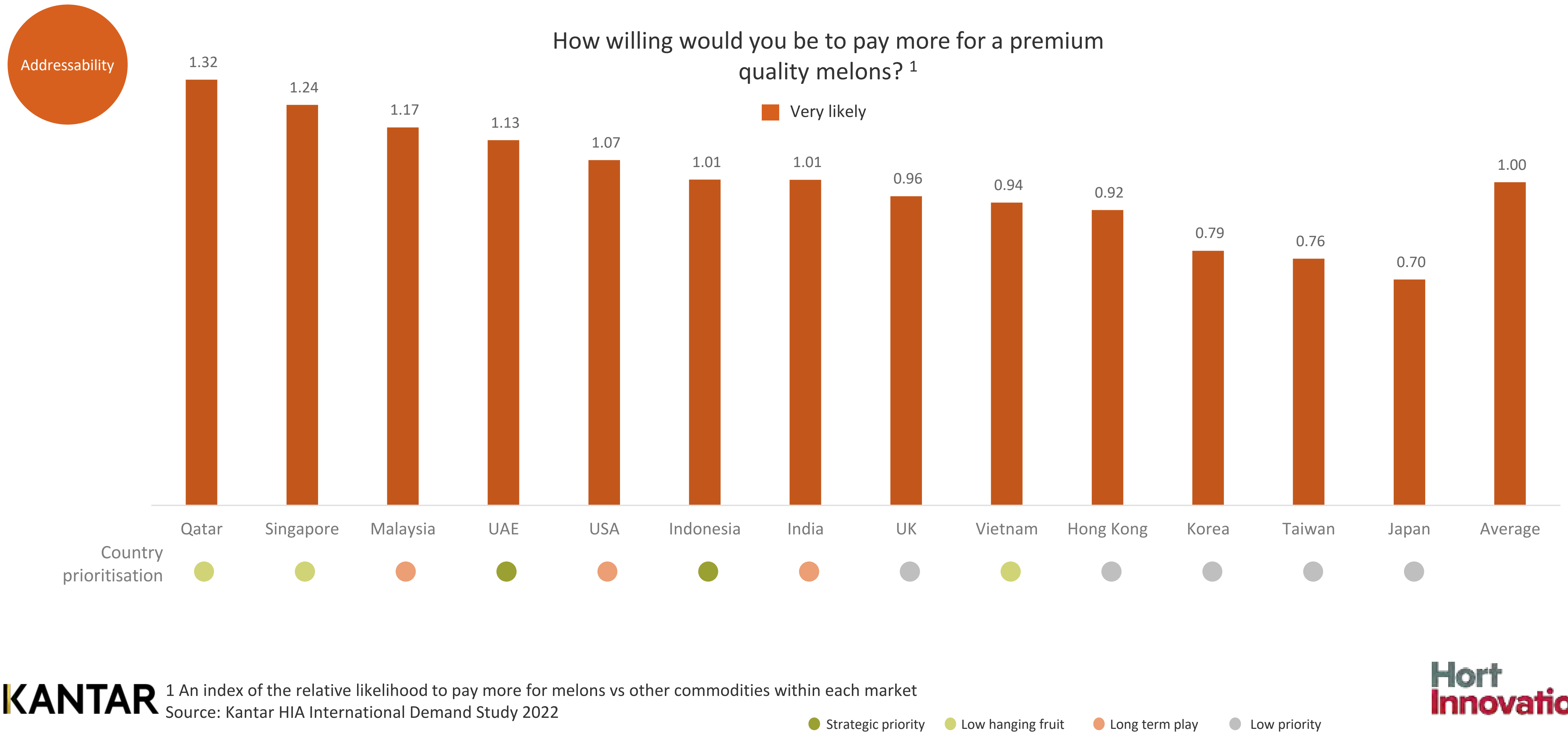
Source: Kantar HIA International Demand Study 2022

KANTAR

Hort Innovation

Relative desire for premium vs other commodities varies significant across markets. It’s highest in Qatar and Singapore where, suggesting premium opportunities in these markets

Melon

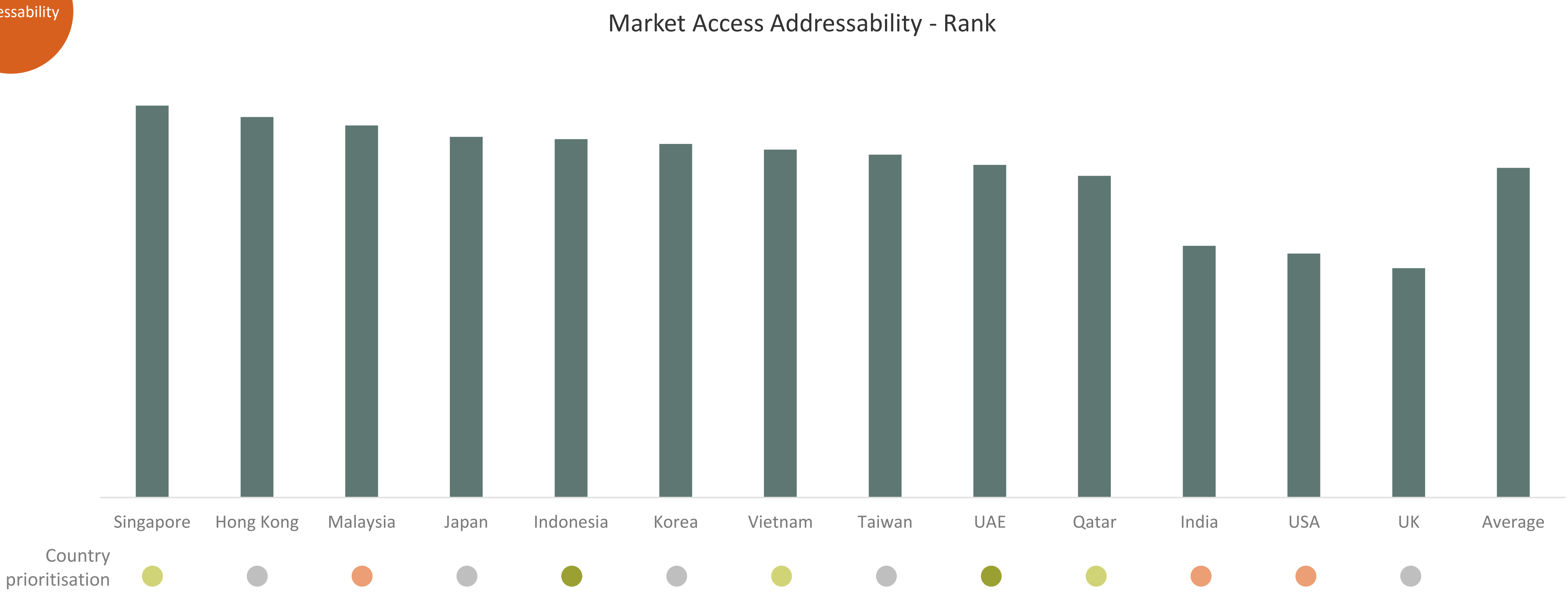


1 An index of the relative likelihood to pay more for melons vs other commodities within each market
Source: Kantar HIA International Demand Study 2022

Some markets rank as more addressable due to the ease of trade, market risk and value chain competitiveness

Melon

Addressability



KANTAR

Source: Deloitte Access Economics 2021

Strategic priority · Low hanging fruit · Long term play · Low priority

Hort Innovation

KANTAR

3.8

Melon

i. Market prioritisation

Leverage the strategic framework to prioritize markets based on consumer behaviour, perception and market access

ii. Commodity profiling

In-depth data profiling of how the commodity is consumed across markets, premium triggers and barriers

Hort Innovation

The prioritisation revealed x2 markets ripe for Melon export. The next section will deep dive into Melon consumption across markets

Melon

USA | UK | Singapore | India | Japan | Hong Kong | South Korea

Market priorities

Malaysia | UAE | Qatar | Taiwan | Vietnam | Indonesia

Market priorities

KANTAR

Strategic priority · Low hanging fruit · Long term play · Low priority

Hort Innovation

Melon consumption snapshot

Melon

		Indonesia	UAE
	HOW OFTEN (P1W pen.)	44%	42%
	WHEN	Lunch Dessert Snack	Snack Lunch
	HOW	Fresh on its own	Fresh on its own
	WHY	Tasty Quick & Easy	Tasty Indulgence
	WHERE	At home	At home
	WHO WITH	With Family	With Family

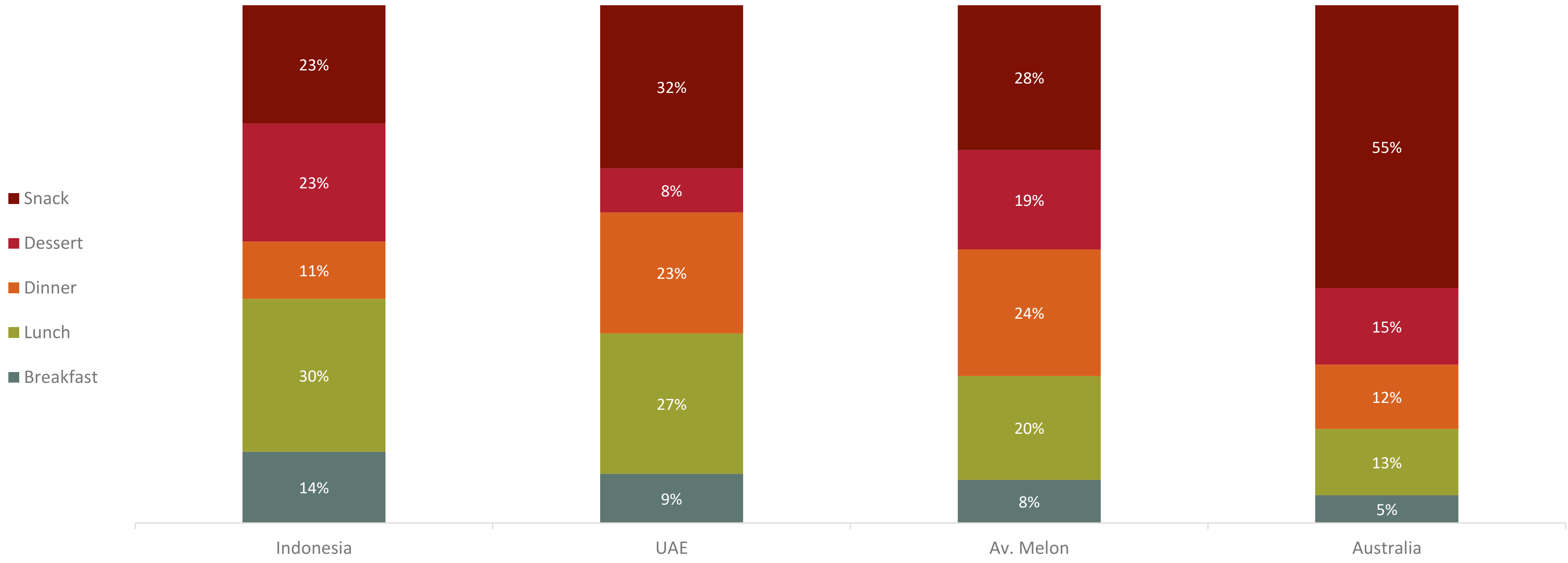
Melon: Strategic Imperatives

Melon

	Indonesia	UAE
CONSUMER PREFERENCES	As a tasty, quick & easy lunch, dessert or snack, fresh on its own, at home with family	As a tasty and indulgent, snack or lunch, fresh on its own, at home with family
NEEDS TO SATISFY	Tasty Quick & Easy	Tasty Indulgence
FUNCTIONAL ATTRIBUTES	Fresh and Light Refreshing Taste	Refreshing Taste Sweet
PREMIUM OPPORTUNITY	Fresher Sweeter High in vitamins & minerals	Fresher Sweeter Free from pesticides
BARRIERS TO OVERCOME	More exciting alternatives	Larger quantity then needed
KEY SUBSTITUTES	Mangoes Bananas	Apple Bananas

Melons are consumed with lunch, dessert or a snack in Indonesia and as a snack or lunch in UAE

When did you consume?



KANTAR

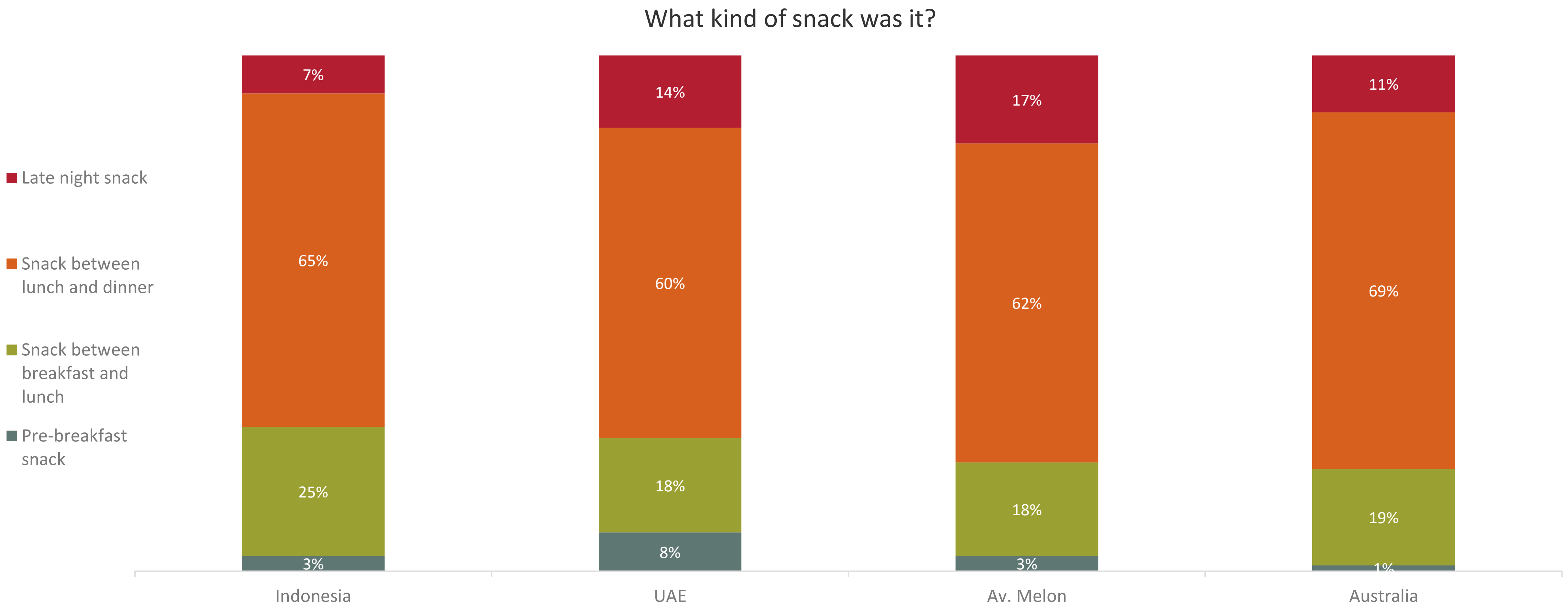
Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	295	295	300	300	297	224	294	296	298	295	41

Hort Innovation

When consumed as a snack, Melons are consumed between lunch and dinner

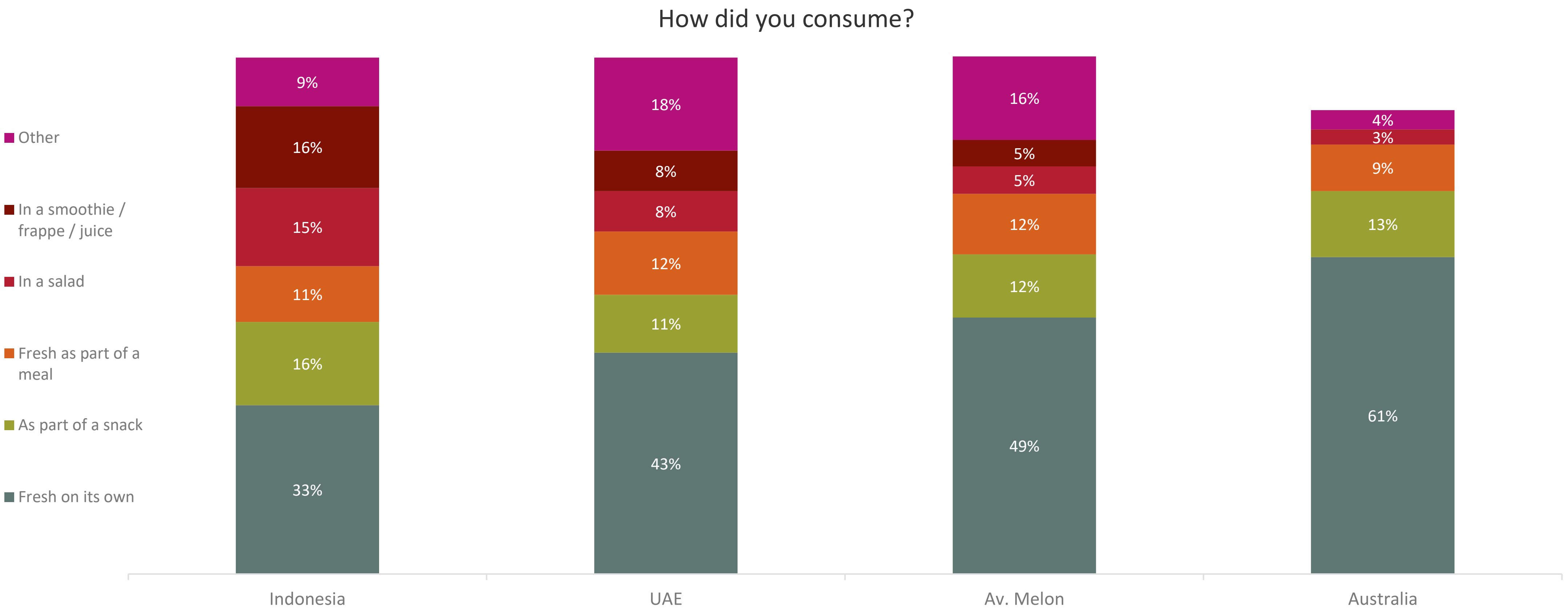
Melon



Source: Kantar HIA International Demand Study 2023

Melons are consumed fresh on their own or as part of a meal or as part of a snack

Melon



'Other' = As an ingredient in cooking, Cooked on its own, As a topping (e.g., on yoghurt, as a garnish etc.), As part of an alcoholic drink e.g. cocktail, For decoration / show only, To make baby food / puree, As and ingredient in baking and Don't know

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	295	295	300	300	297	224	294	296	298	295	41

KANTAR

Hort Innovation

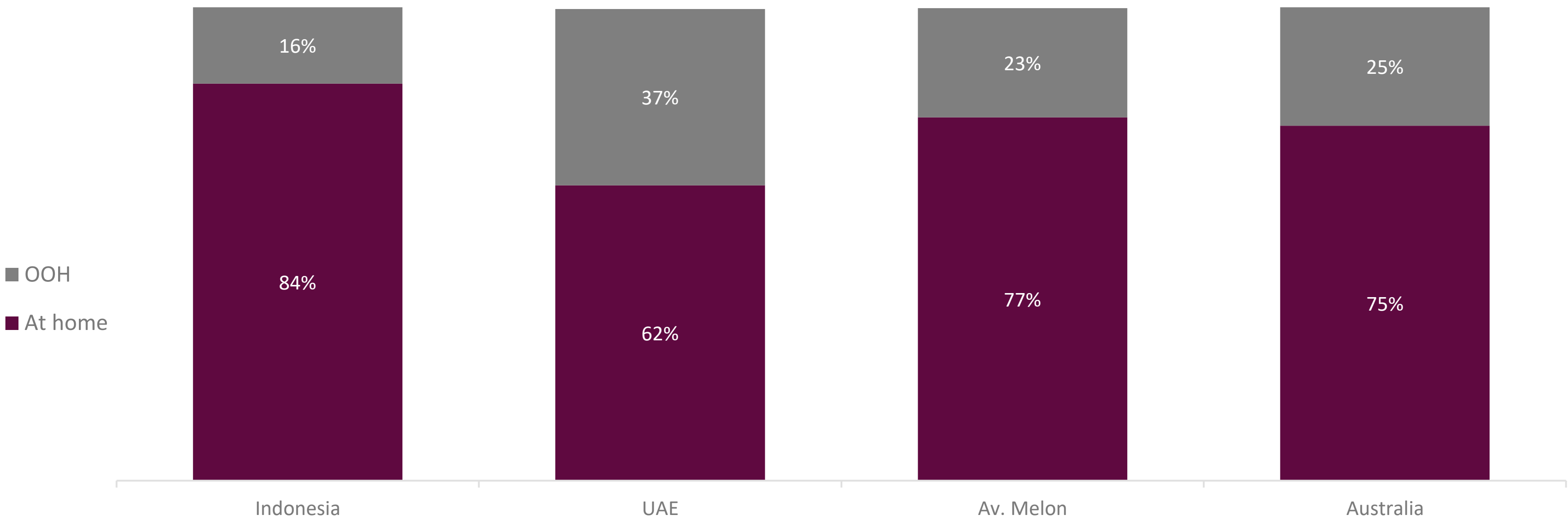
Most people consume Melon at home. UAE skews more out of home

Melon

Where were you?

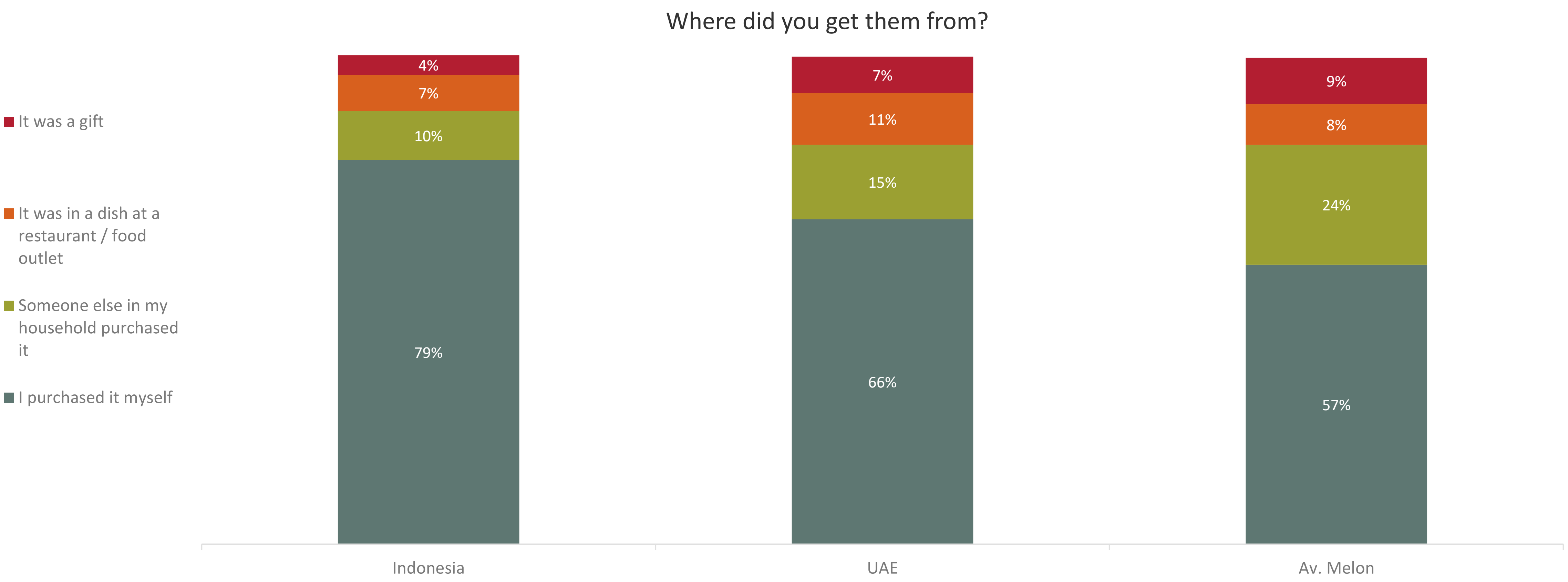
77%

Of consumption of melons is in the home, this varies only slightly by market



Most people purchase Melons themselves

Melon



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	293	300	295	295	300	300	297	224	294	296	298	295	41

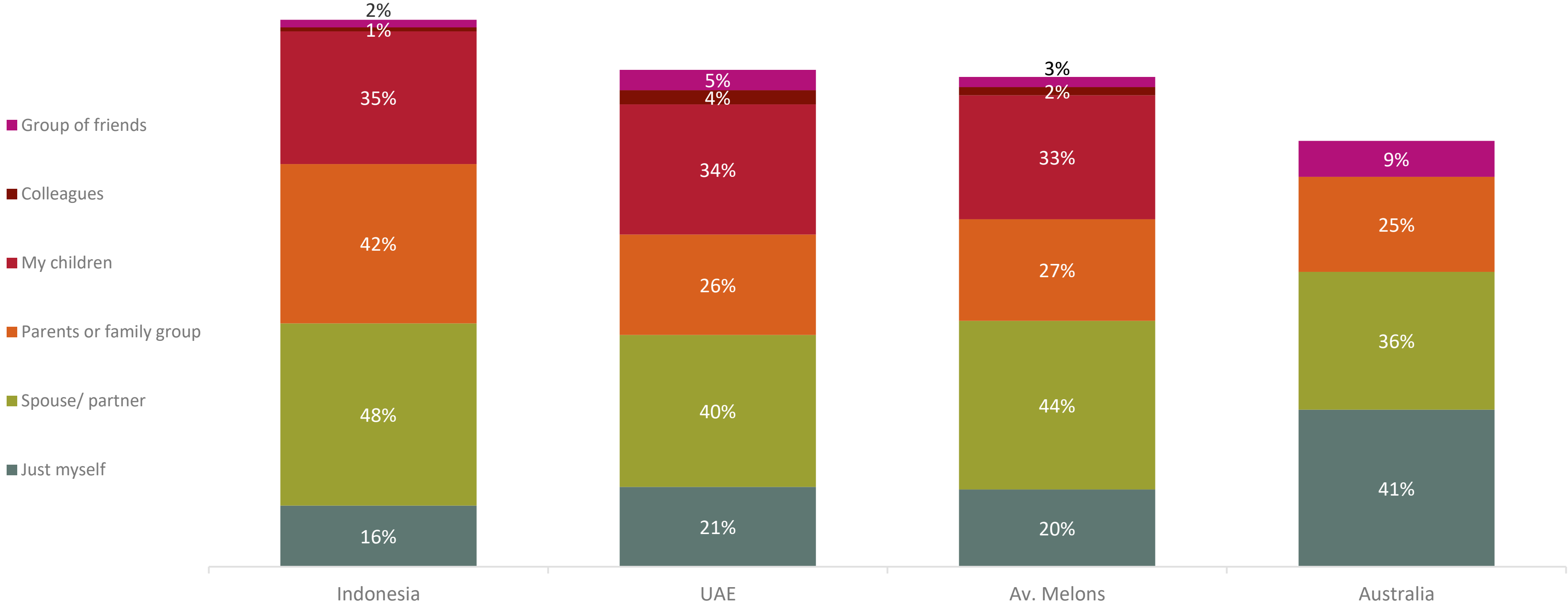
Melons are typically consumed with a spouse or partner or with the broader family group

Melon

Who were you with?

33%

Of consumption of melons (on average) is with children.



Source: Kantar HIA International Demand Study 2023

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	293	300	295	295	300	300	297	224	294	296	298	295	41

There is a range of reasons why people choose to eat different fruits & vegetables. There are
6 universal consumer needs pillars that drive this choice for consumers globally

The 6 needs pillars are universal across commodities and global markets

Tasty	Quick & Easy	Healthy & Nutritious	Indulgence	Physical & Mental Energy	Connection
All about: Taste, Refreshment, and Enjoyment	*All about:* Convenience Simplicity, and Ease	*All about:* Guilt-free, Nourishing and Sensible	*All about:* Comfort, Relaxation and Self Care	*All about:* Energy, Uplift, and Reinvigoration	*All about:* Bonding, Celebration and Creating Memories

KANTAR

Hort Innovation

In priority markets, the most important reasons why people choose to consume Melon are for something tasty, quick and easy and indulgence

67%

of people in priority markets consume Melons for something

Tasty

46%

of people in priority markets consume Melons for something

Quick & Easy

42%

of people in priority markets consume Melon for an

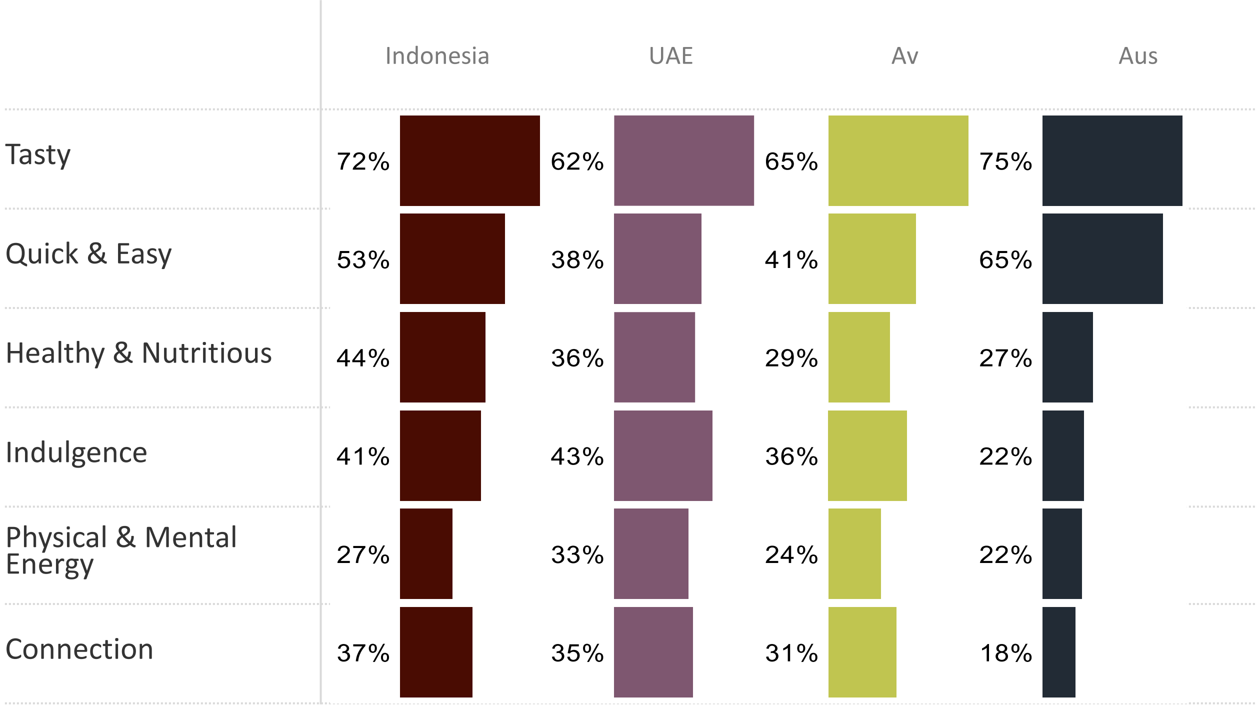
Indulgence

317

Taste is the most important consumption driver across priority markets, followed by quick and easy in Indonesia and Indulgence in UAE

Melon

Which were important when choosing to consume?



Source: Kantar HIA International Demand Study 2023

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	293	300	295	295	300	300	297	224	294	296	298	295	41

Specifically, consumers are looking for Melons that are ‘really tasty’ and ‘refreshing’ along with ‘quick and easy’ and ‘nutrition’ in Indonesia

Melon

Which were important when choosing to consume?

	Indonesia	UAE	Av	Aus
Really tasty	34%	36%	38%	34%
Refreshing	50%	36%	34%	56%
Quick and easy	36%	20%	22%	43%
Everyone would eat	20%	17%	19%	14%
Good for sharing	24%	16%	17%	10%
To satisfy a craving	10%	19%	15%	11%
Has the nutrition my mind / body needs	28%	14%	15%	10%
That helped me relax / unwind	19%	9%	13%	7%
Already available at home / work etc.	13%	10%	11%	17%
That does not require much thought	8%	8%	11%	14%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	295	295	300	300	297	224	294	296	298	295	41

Hort Innovation

More functionally, consumers are looking for Melons that have a sweet taste while still being light and refreshing

36%

of people in priority markets are looking for Melons that have

Refreshing taste

32%

of people in priority markets are looking for Melons that are

Sweet

32%

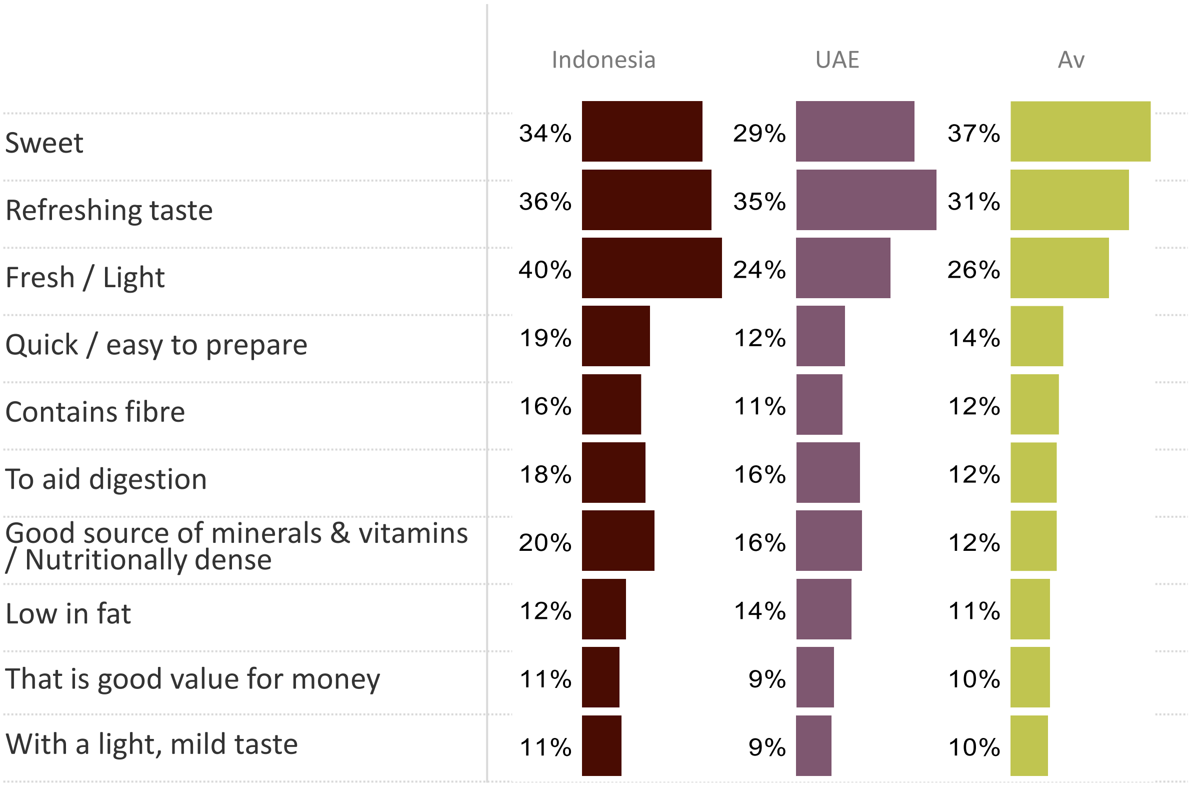
of people in priority markets are looking for Melons that are

Fresh / Light

In both priority markets, consumers are looking for sweetness, refreshing taste and freshness

Melon

What were you looking for when you consumed?



KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	295	295	300	300	297	224	294	296	298	295	41

Hort Innovation

When it comes to the premium opportunity, consumers are looking for Melons that are fresher, sweeter, free of pesticides, and are in the right state of ripeness

45%

of people in priority markets are looking for premium Melons that are

Fresher

36%

of people in priority markets are looking for premium Melons that are

Sweeter

31%

of people in priority markets are looking for premium Melons that are

Free from pesticides

27%

of people in priority markets are looking for premium Melons that are

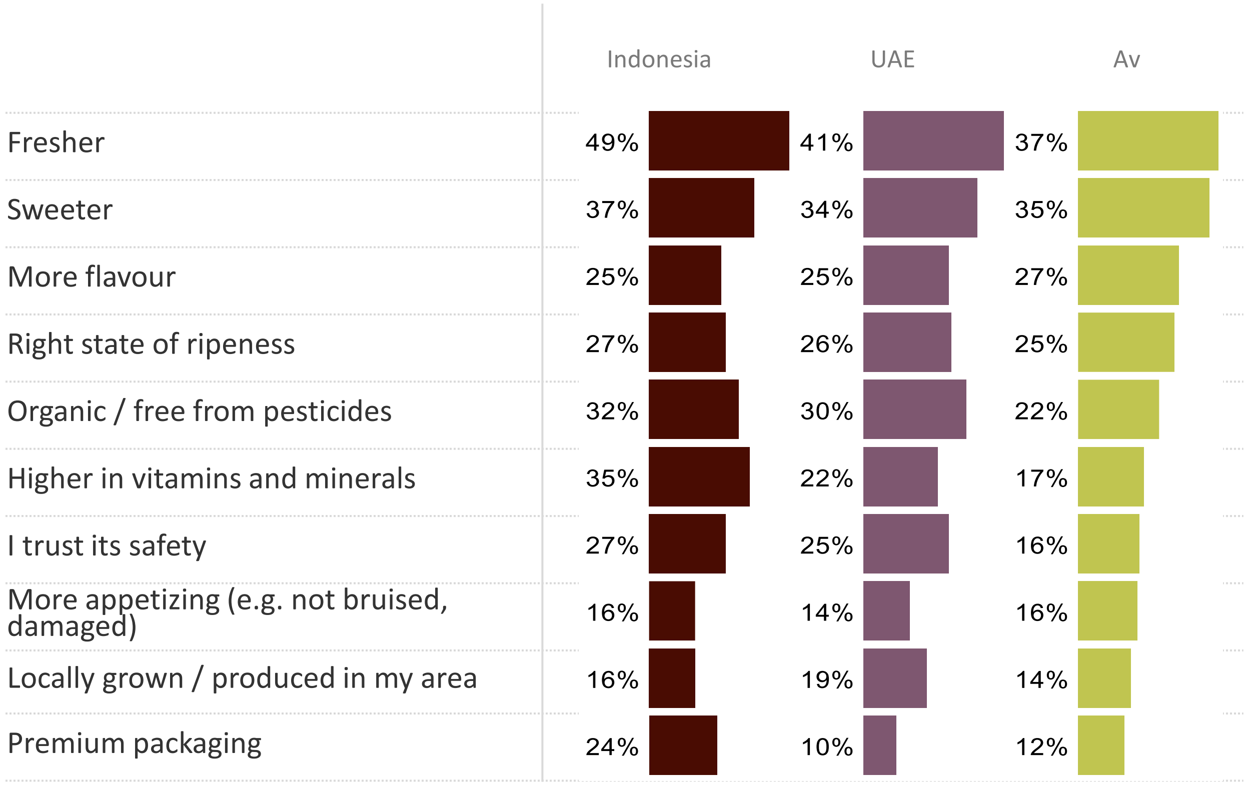
In the right state of ripeness

Source: <sources here; divided by a semi-colon; all on one line>

Premium quality in both priority markets is characterised by freshness, sweetness, organic or free from pesticides. In Indonesia vitamins and minerals are also important

Melon

What does premium quality mean to you?



KANTAR

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	293	300	295	295	300	300	297	224	294	296	298	295	41

Hort Innovation

Other exciting alternatives are the primary barrier to overcome with melon consumption, followed by price and ripeness.

Apples and bananas are considered worthy substitutes

Barriers to Consumption

Exciting Alternatives	Price	Ripeness
20% (priority market average)	16% (priority market average)	14% (priority market average)

Leading Substitutes

Apples	Bananas	Mangoes
37% (priority market average)	36% (priority market average)	36% (priority market average)

Key barriers in priority markets are more exciting alternatives in Indonesia and lack of necessary quantity in UAE

Melon

What are the reasons you may not choose?

	Indonesia	UAE	Av
It is too expensive	18%	13%	27%
There are more exciting alternatives	25%	14%	13%
It is too messy to eat	8%	13%	12%
Quality is often poor	15%	14%	12%
It goes off too quickly / it does not last	11%	13%	11%
They are never in the right state of ripeness when sold in shops	11%	16%	10%
It bruises easily	11%	14%	10%
It contains too much sugar	10%	10%	10%
The quantity is more than I typically need	9%	17%	10%
It is not convenient / ideal for on the go	10%	5%	9%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	295	295	300	300	297	224	294	296	298	295	41

Hort Innovation

Apples, Bananas and Mangos are key substitutes in both priority markets as well as papaya in Indonesia


Melon

What else would you typically consider having instead?

	Indonesia	UAE	Av
Apple	41%	32%	32%
Bananas	43%	29%	29%
Mango	44%	27%	24%
Strawberries	18%	23%	18%
Pineapple	13%	21%	17%
Pear	29%	13%	16%
Papaya	38%	16%	15%
Table Grapes	11%	24%	14%
Citrus fruits	15%	11%	14%
Kiwifruit	7%	15%	13%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	295	295	300	300	297	224	294	296	298	295	41

Hort Innovation

Recommendation: How to drive growth in Australian Melons

Melon

1. Focus on Strategic Priority Markets

Focus on markets where category **penetration is high** and consumers are **willing to pay a premium** for quality Melons (ie. **Indonesia and UAE**). Leverage already **high appeal for Australian Melons in Indonesia and UEA**, to drive incremental growth in Australian Melons exports.

2. Deliver Core Consumer Needs

Deliver the core consumer needs across priority markets with Melons that have a **refreshing taste**, and **are a quick and easy indulgence**. Ensure Melons are at or above par for being **sweet, fresh and light, that serve as a convenient lunch or snack fruit.**

3. Leverage Premium Advantage

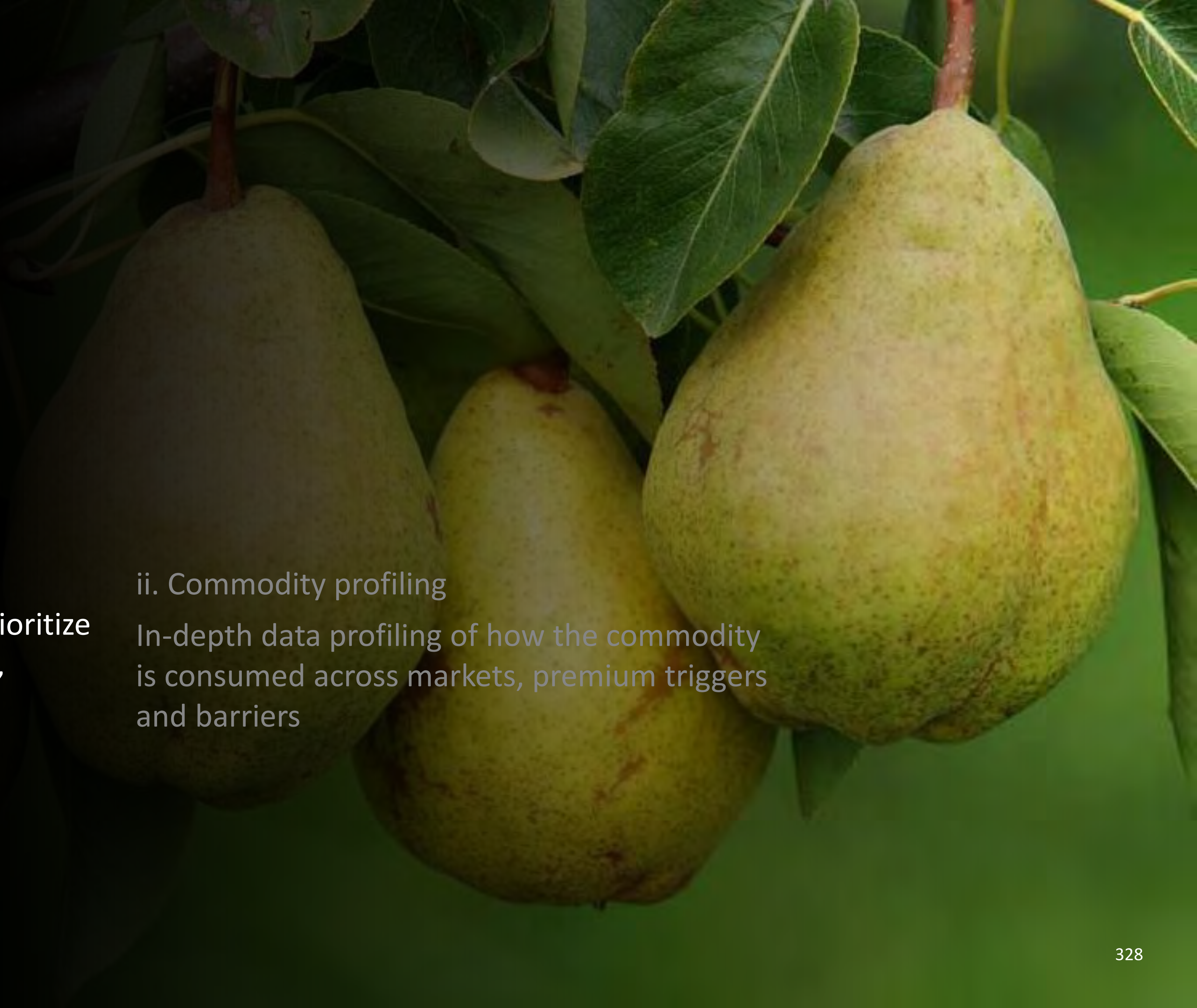
Maximise the premium opportunity by delivering Melons that are fresher, sweeter, are free of pesticides, and are in the right state of ripeness.

4. Reduce Consumption Barriers

Address perceptions that Citrus Fruits are **less exciting than alternatives, are too expensive, and are never in the right state of ripeness in shops,** to minimise consumer drift to close substitutes like Apples, Bananas and Mangoes**.**

'Where to Play' ← *'How to Win'* →

KANTAR



3.9 Pear

i. Market prioritisation

Leverage the strategic framework to prioritize markets based on consumer behaviour, perception and market access

ii. Commodity profiling

In-depth data profiling of how the commodity is consumed across markets, premium triggers and barriers

Hort Innovation

4 key considerations when interpreting the outputs of the Market Prioritisation

1. No Existing Technical Market Access

2. Markets with Existing Trade

3. Premium Opportunities

4. Focus of Investment

1. No Existing Technical Market Access

Existing technical market access for a commodity was **intentionally NOT included** in the evaluation of addressability

Rationale:

- This project was designed to identify attractive and addressable **future** growth geographies therefore the analysis was not restricted by current arrangements
- This research is intended to **support and inform industry** decisions regarding the progress of any potential future or ongoing market access or market improvement request

2. Markets with Existing Trade

While the addressability calculation includes data on general market access and trade, it intentionally does not include whether Australia currently trades in a particular commodity

Rationale:

- The objective of this analysis is to provide an objective assessment of whether a market is attractive and addressable independent of current arrangements
  - If a market that we are currently trading with for a particularly commodity is shown NOT to be a ‘Strategic Priority’, this does NOT mean that we should consider withdrawing from this market.
  - However, we recommend re-evaluating the relative focus of investment in this market, and consider other markets when looking for **future** growth opportunities

3. Premium Opportunity

In evaluating attractive and addressable export markets, we have intentionally used data that shows where premium opportunities can be found

Rationale:

- The overall objective of this project was to identify **profitable** growth opportunities for commodities in the future, and Australian commodities will have more chance of growing profitably where they have a better chance for commanding a price premium
  - High commodity penetration in a market has also been used to evaluate attractiveness, but this analysis favours markets where there is a larger opportunity for Australian products to command a **premium**.

4. Focus of Investment

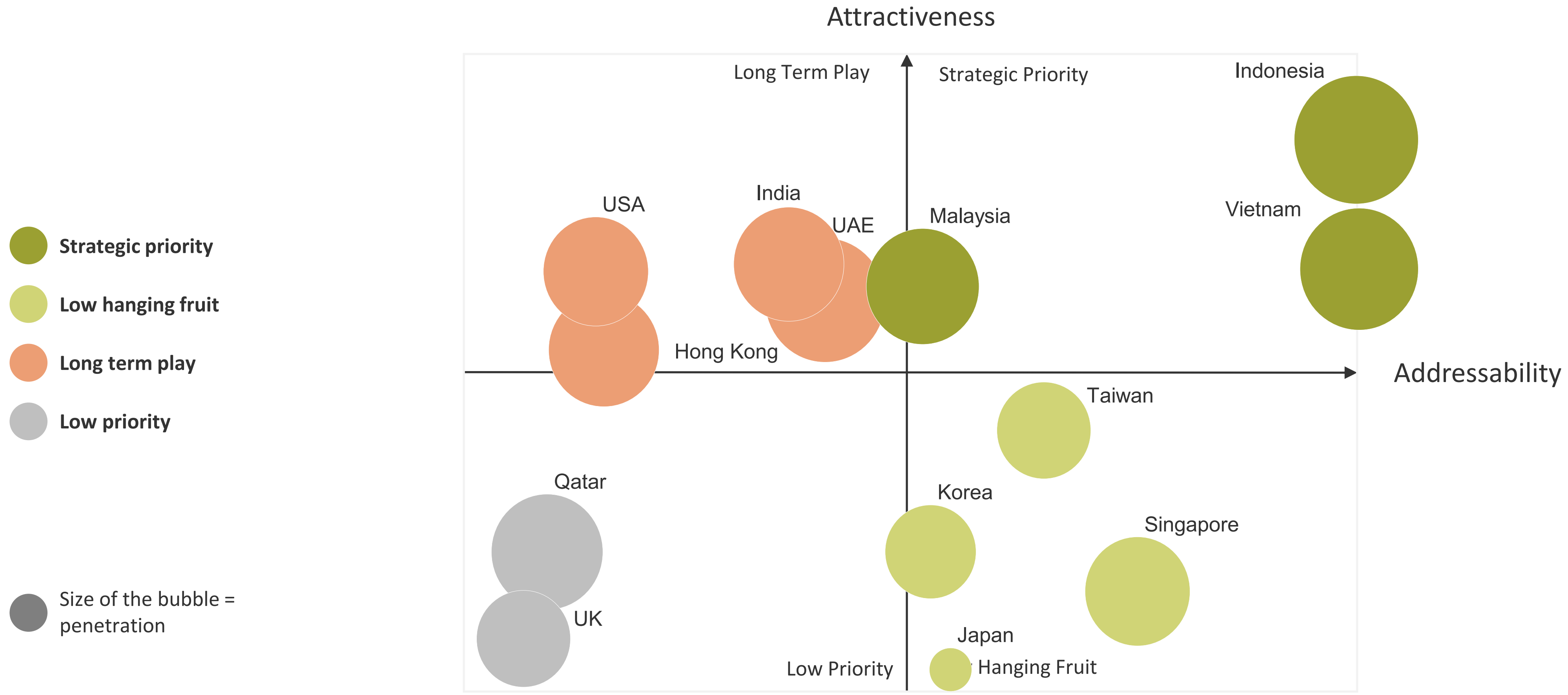
The evaluation and prioritisation of export markets into the 4 quadrants of attractiveness and addressability **is intended to be only one input into decision making** about **where to focus investment**

Rationale:

- The objective of this project was primarily to offer a consumer lens into commodity consumption, to enable export decisions to be informed by more robust consumer data (while still included additional market factor data from previous Deloitte analysis)
  - Export decisions should be made using all available information including the economics of local growers and exporters and this report forms one input into that decision process

We have identified 3 strategic priority markets that represent the most attractive and appealing export opportunity for Australian pears, based on consumer preference and behaviour

Pear



Source: Kantar HIA International Demand Study 2022, World Bank 2021

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Hort Innovation

Pear: Strategic priorities

Pear

	Malaysia	Vietnam	Indonesia
STRATEGIC IMPLICATIONS	With high penetration and a strong willingness to pay more, Malaysia presents a strong opportunity for Pears	Vietnam represents a strong Pear export opportunity with very high penetration and Australian appeal coupled with a greater likelihood to command a premium	Indonesia has a low income per capita, but sizeable population and with high penetration, Australian appeal and claimed willingness to pay it presents a strong opportunity
ATTRACTIVENESS	• High penetration (35%) • Strong claimed willingness to pay 1.5x	• Very high penetration (39%) • Strong claimed willingness to pay 1.5x	• Highest penetration (43%) • Highest claimed willingness to pay 1.5x
ADDRESSABILITY	• Moderate Australian appeal • Slightly less likely to command a premium over other commodities	• High Australian appeal • Greater likelihood to command a premium over other commodities	• High Australian appeal • Moderate likelihood to command a premium over other commodities

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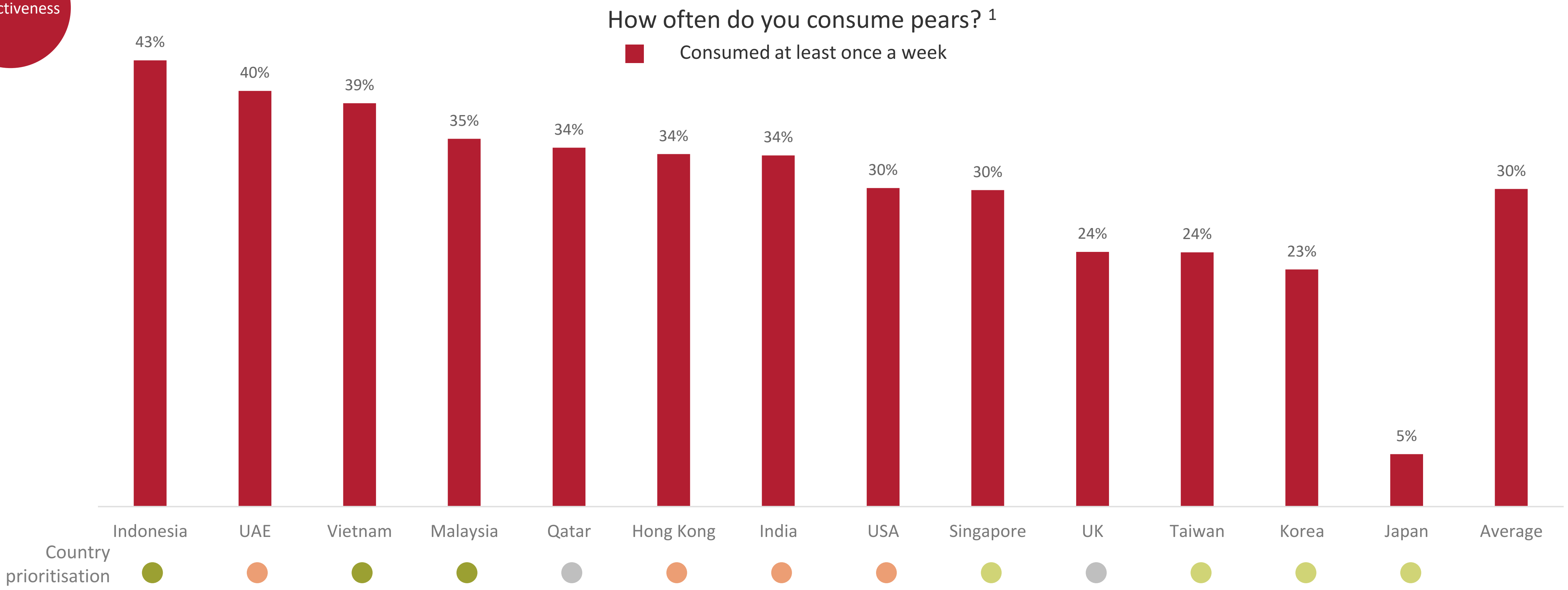
Pear

Pears are most frequently consumed in Indonesia, the UAE and Vietnam with over 40% of consumers in these markets consuming them weekly

Attractiveness



1 An adjustment factor has been applied to results in India, Indonesia, Vietnam, UAE and Qatar to account for overclaim in these markets – see appendix for further detail

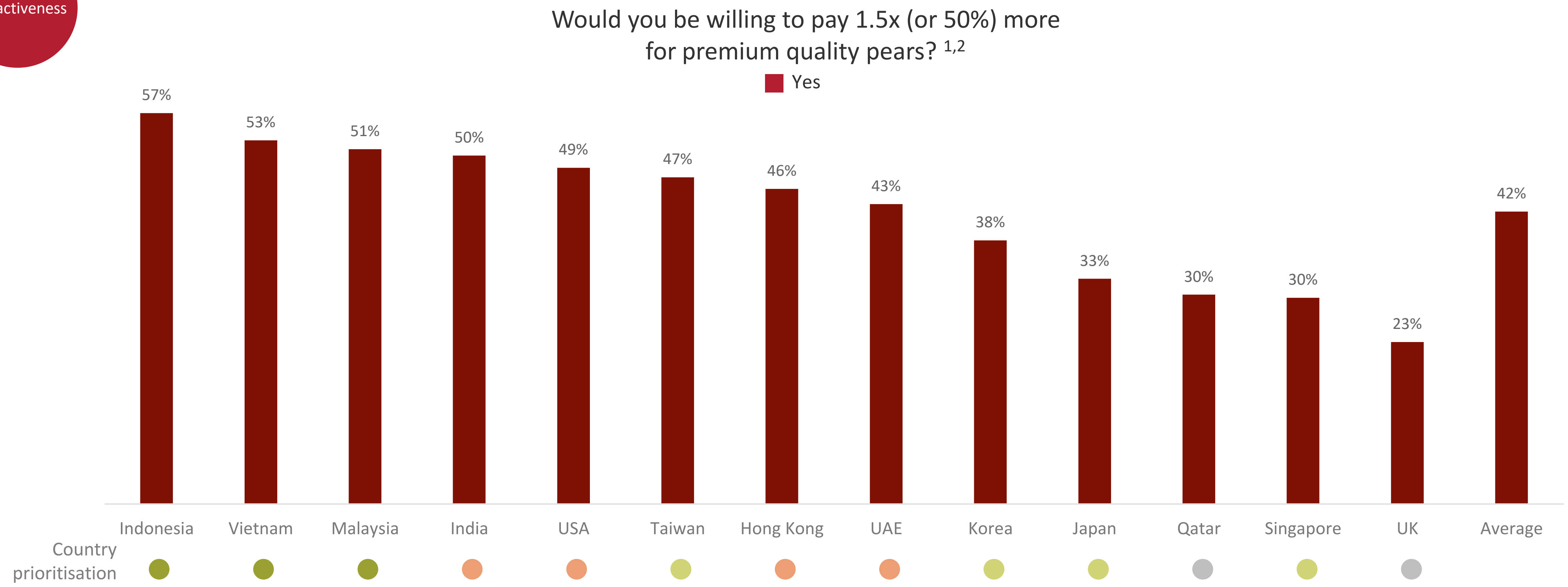
Source: Kantar HIA International Demand Study 2022

Strategic priority · Low hanging fruit · Long term play · Low priority

Across most markets pears have the some potential to command a premium price

Pear

Attractiveness



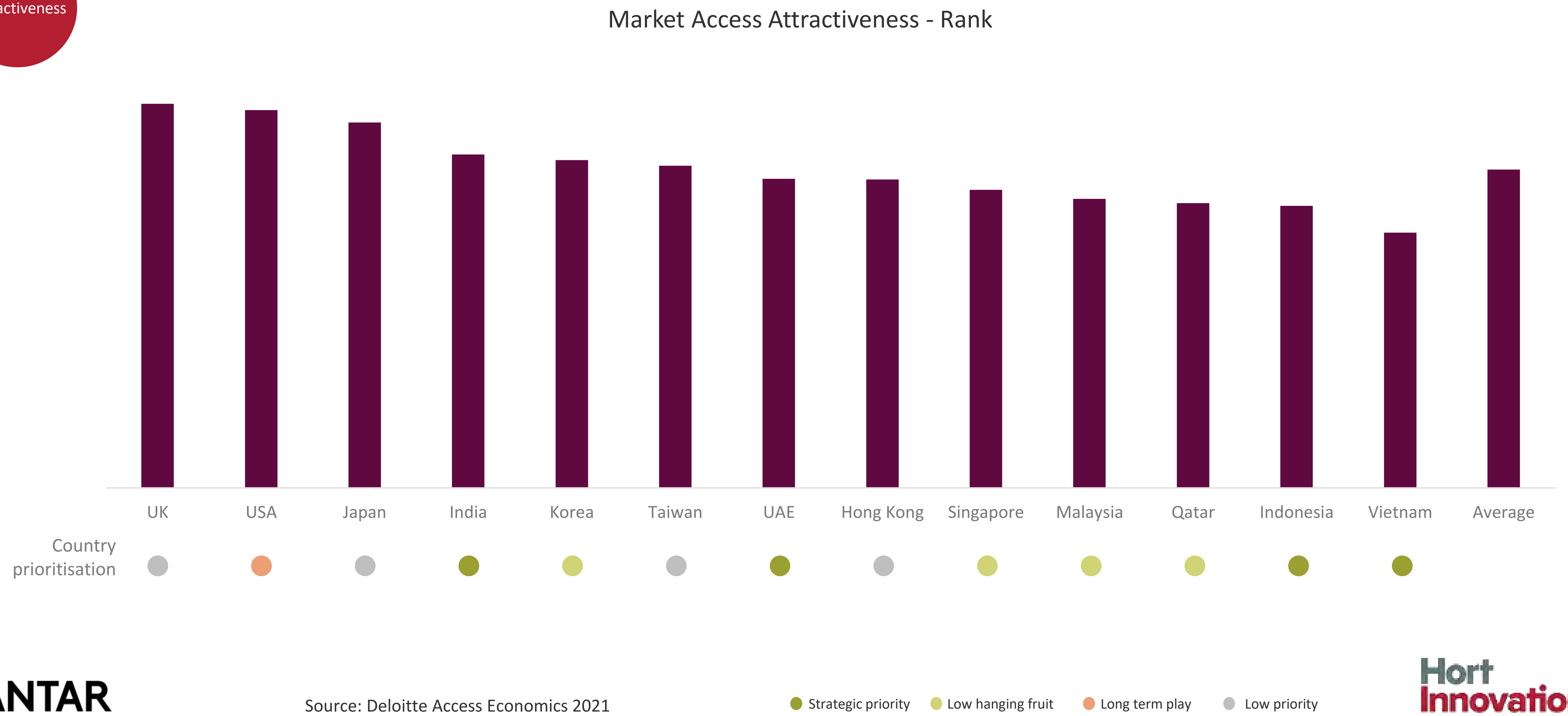
1 Consumers asked if they would be willing to pay 50% more than they currently pay in their market (no price specified)
2 An adjustment factor has been applied to results in India, Indonesia, Vietnam, UAE and Qatar to account for overclaim in these markets – see appendix for further detail
Source: Kantar HIA International Demand Study 2022

Strategic priority Low hanging fruit Long term play Low priority

Although all markets are attractive, more affluent markets with larger populations rank more highly

Pear

Attractiveness

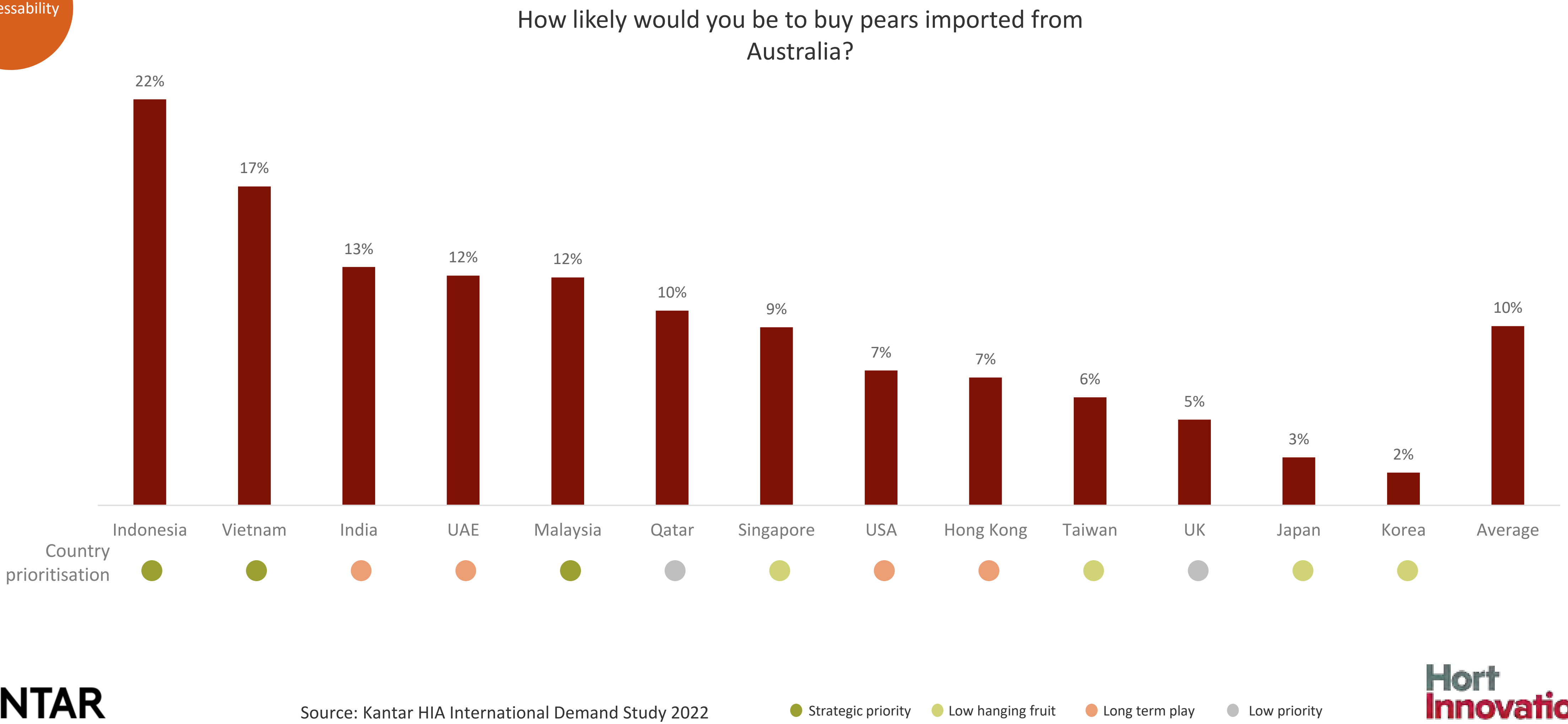


Source: Deloitte Access Economics 2021

Pears have strong Australian appeal in Indonesia and Vietnam, however less so in markets like the UK, Japan and Korea

Pear

Addressability

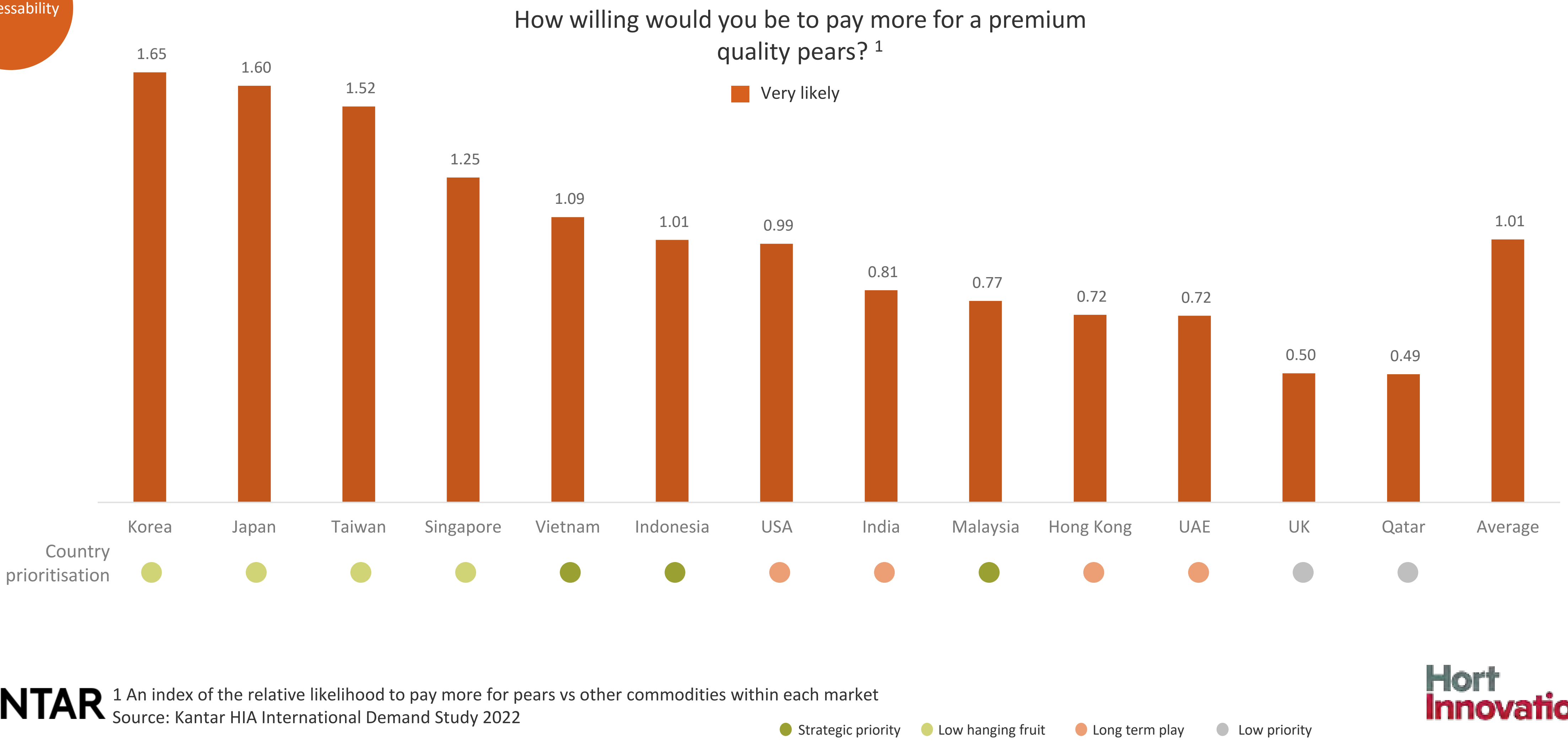


Source: Kantar HIA International Demand Study 2022

Relative desire for premium vs other commodities is strongest in Korean, Japanese and Taiwanese markets

Pear

Addressability



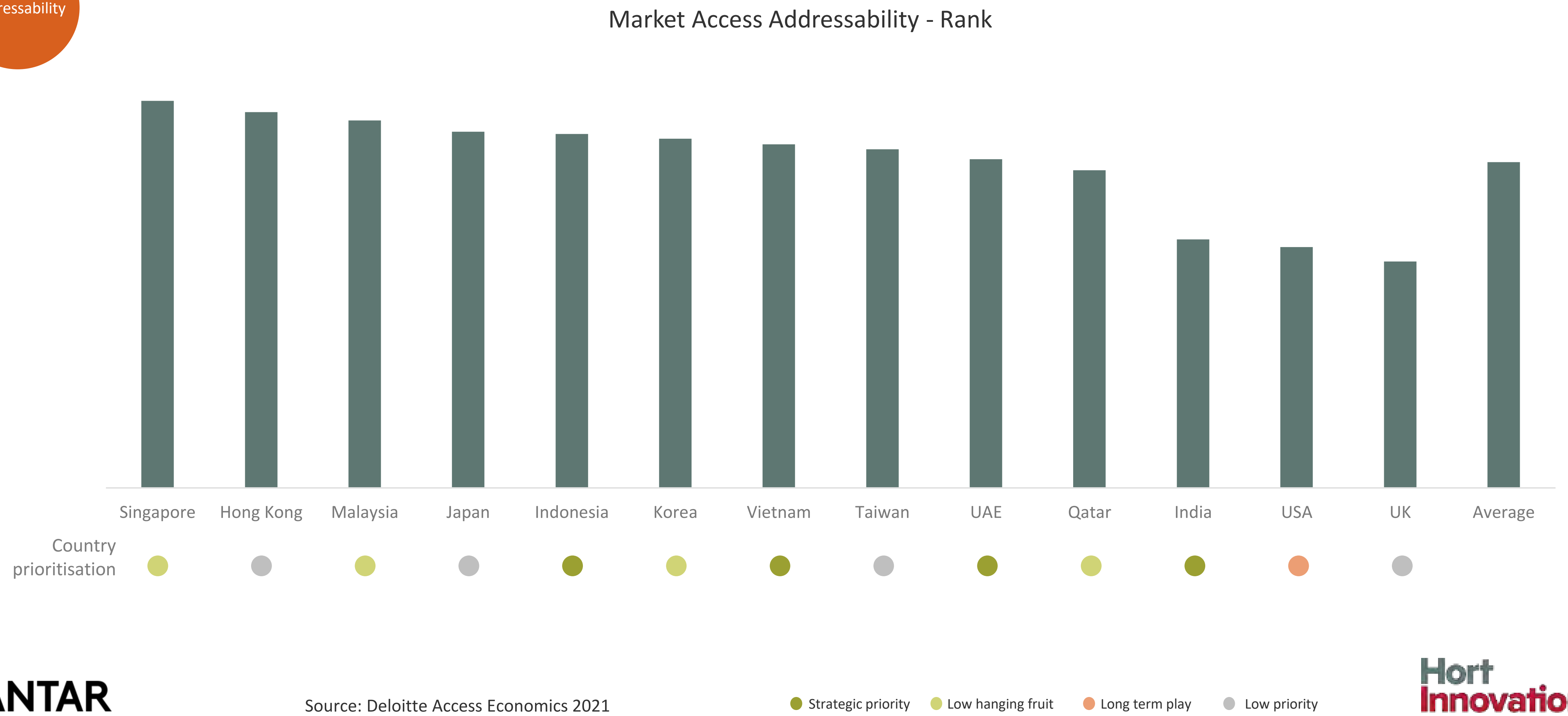
1 An index of the relative likelihood to pay more for pears vs other commodities within each market

Source: Kantar HIA International Demand Study 2022

Some markets rank as more addressable due to the ease of trade, market risk and value chain competitiveness

Pear

Addressability



Source: Deloitte Access Economics 2021

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3.9
Pear

i. Market prioritisation
Leverage the strategic framework to prioritize markets based on consumer behaviour, perception and market access

ii. Commodity profiling

In-depth data profiling of how the commodity is consumed across markets, premium triggers and barriers

Hort Innovation

The prioritisation revealed x3 markets ripe for Pear export. The next section will deep dive into pear consumption across markets

Pear

Market	Market priority
USA	Long term play
UK	Low priority
Singapore	Low hanging fruit
India	Long term play
Japan	Low hanging fruit
Hong Kong	Long term play
South Korea	Low hanging fruit
Malaysia	Strategic priority
UAE	Long term play
Qatar	Low priority
Taiwan	Low hanging fruit
Vietnam	Strategic priority
Indonesia	Strategic priority

Strategic priority · Low hanging fruit · Long term play · Low priority

Pear consumption snapshot

Pear

	Malaysia	Vietnam	Indonesia
HOW OFTEN (P1W pen.)	35%	39%	43%
WHEN	Snack between lunch and dinner	Lunch Dessert	Snack Lunch
HOW	Fresh on its own	Fresh on its own	Fresh on its own As part of a snack
WHY	Tasty Quick & Easy	Tasty Connection	Tasty Healthy & Nutritious
WHERE	At home	At home	At home
WHO WITH	With Family	With Family	With Family

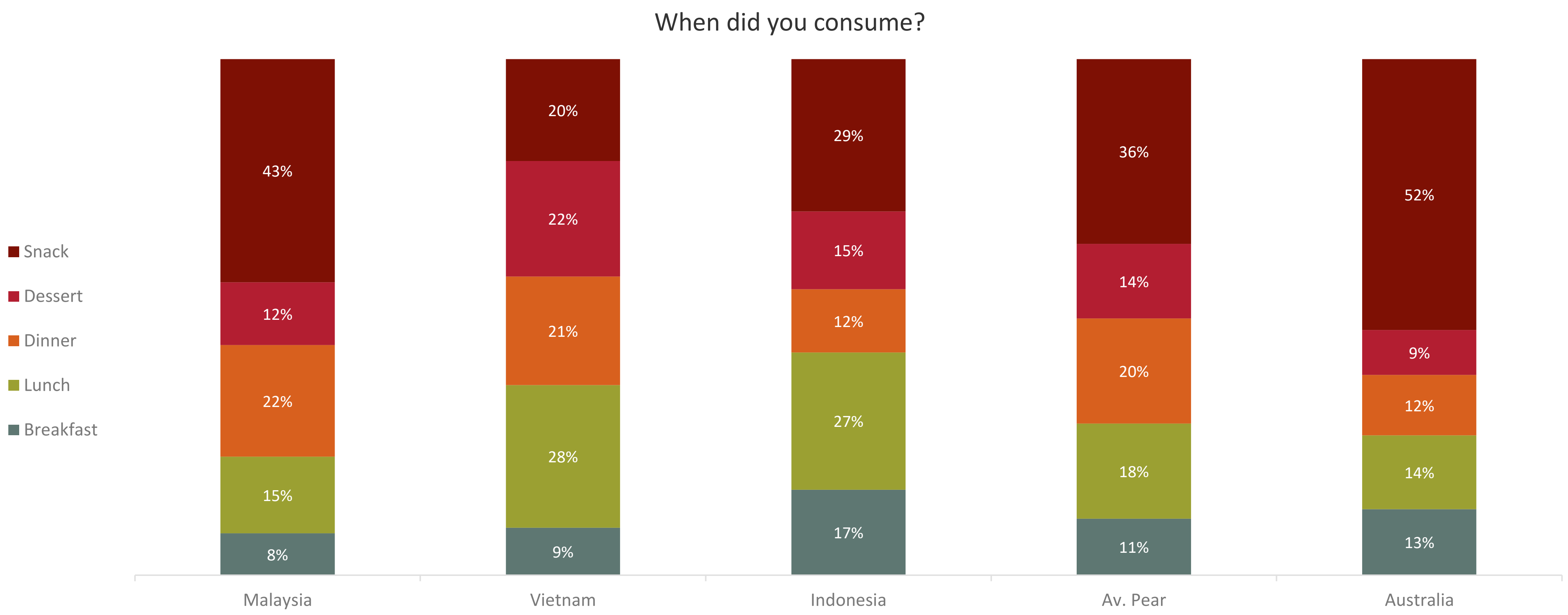
Pear: Strategic Imperatives

Pear

	Malaysia	Vietnam	Indonesia
CONSUMER PREFERENCES	As a tasty, quick & easy snack between lunch and dinner, fresh on its own, at home with family	As a tasty lunch or dessert, fresh on its own, at home with family	As a tasty, healthy & nutritious snack or lunch, fresh on its own or as part of a snack, at home with family
NEEDS TO SATISFY	Tasty Quick & Easy	Tasty Connection	Tasty Healthy & Nutritious
FUNCTIONAL ATTRIBUTES	Sweet Fresh & Light	Refreshing Taste Sweet	Fresh & Light
PREMIUM OPPORTUNITY	Fresher	Fresher More appetising	Fresher Sweeter
BARRIERS TO OVERCOME	Too expensive	Bruises Easily	More exciting alternatives Too expensive
KEY SUBSTITUTES	Apple Bananas	Apple Bananas	Apple Bananas

Pears are mainly consumed as a snack in Malaysia and Indonesia. In Vietnam and Indonesia they are also consumed at lunch

Pear



KANTAR

Source: Kantar HIA International Demand Study 2023

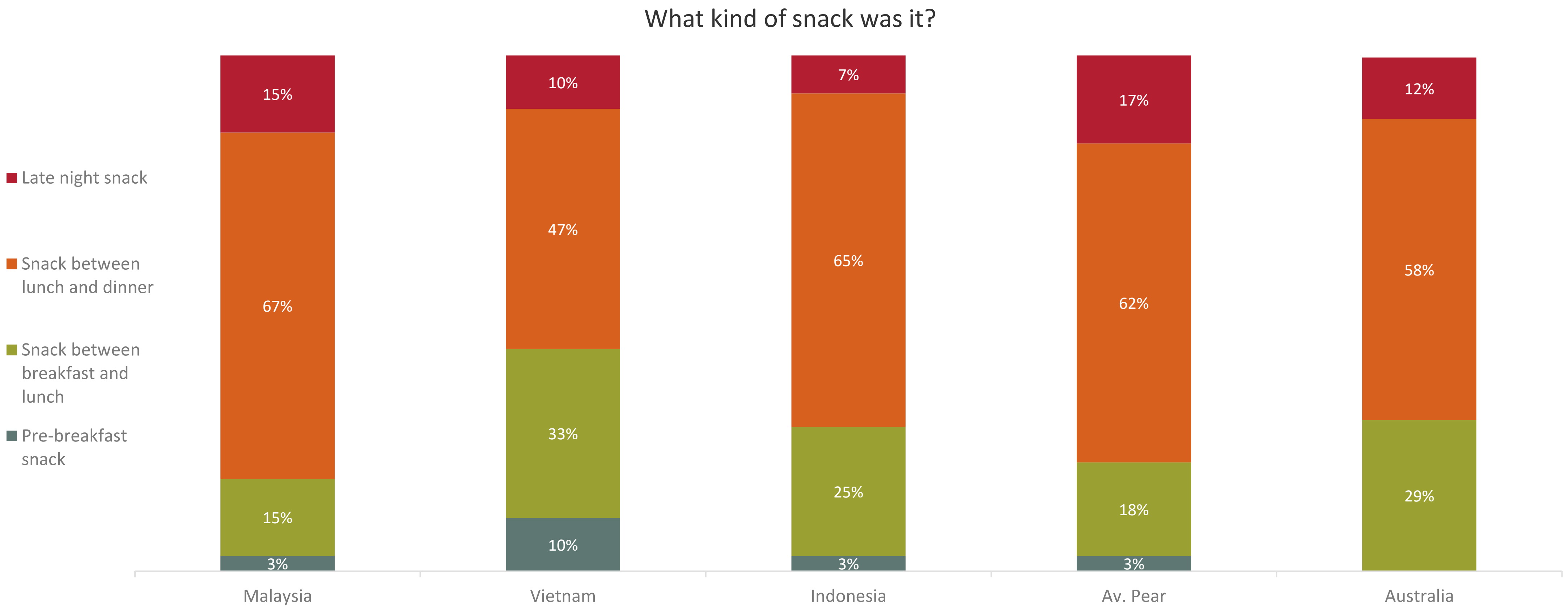
N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	81	76	77	74	92	76	74	57	74	76	139	86	11*

*Caution: Low Base

Hort Innovation

When consumed as a snack, Pears are consumed between lunch and dinner or also between breakfast and lunch in Vietnam

Pear



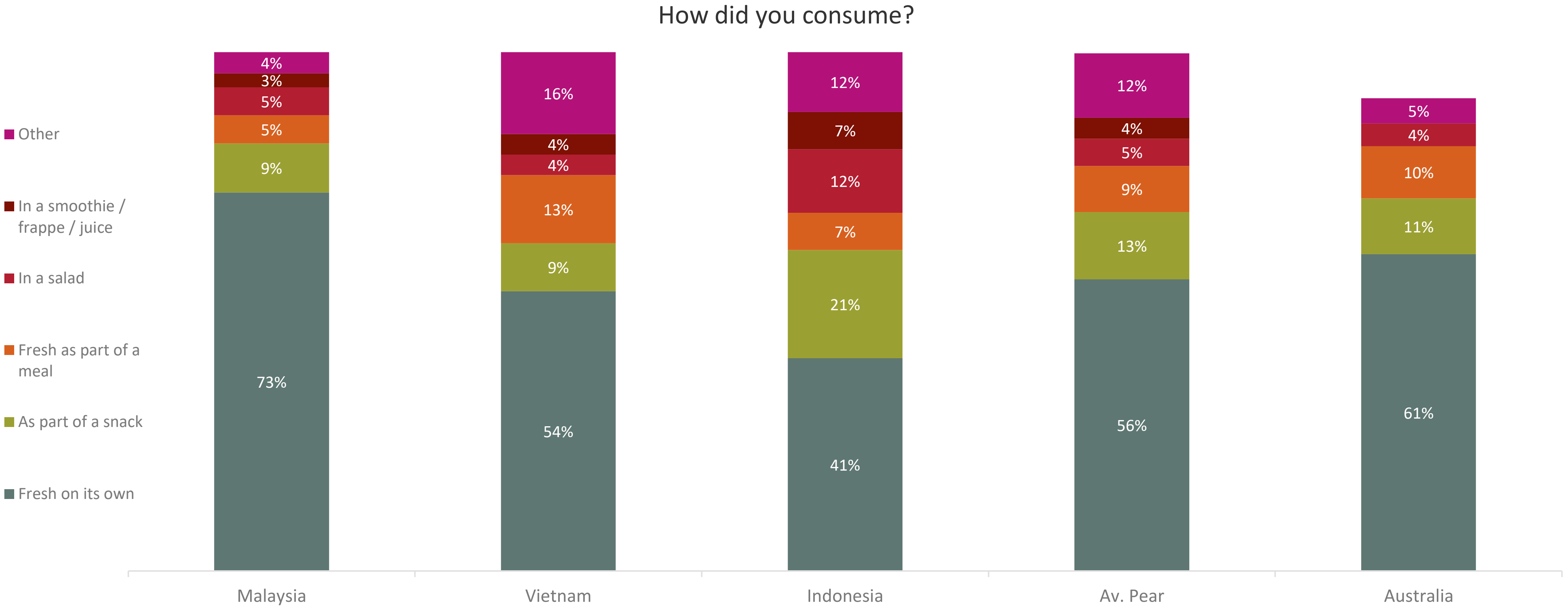
KANTAR

Source: Kantar HIA International Demand Study 2023

Hort Innovation

Pears are mainly consumed fresh on their own or as part of a snack in Indonesia

Pear



'Other' = Cooked on its own, To make baby food / puree, As an ingredient in cooking, As a topping (e.g., on yoghurt, as a garnish etc.), As part of an alcoholic drink e.g. cocktail, As an ingredient in baking, For decoration / show only and Don't know

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	81	76	77	74	92	76	74	57	74	76	139	86	11*

*Caution: Low Base

KANTAR

Hort Innovation

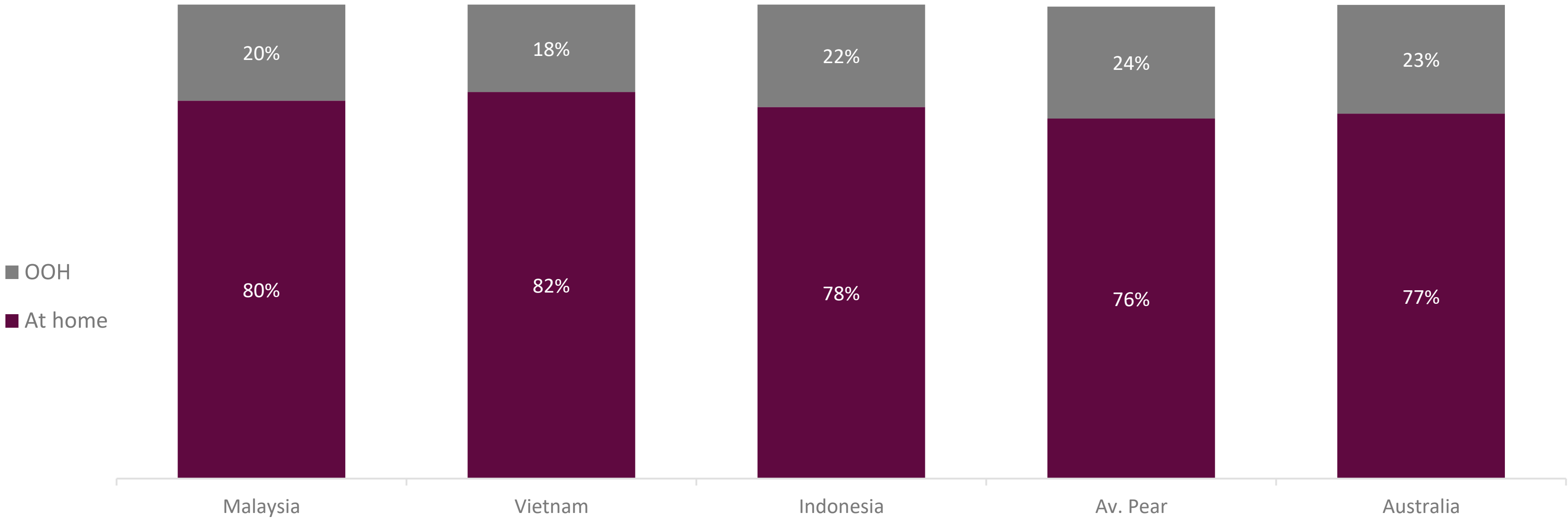
Most people consume Pears at home

Pear

Where were you?

76%

Of consumption of pears is in the home, this varies only slightly by market



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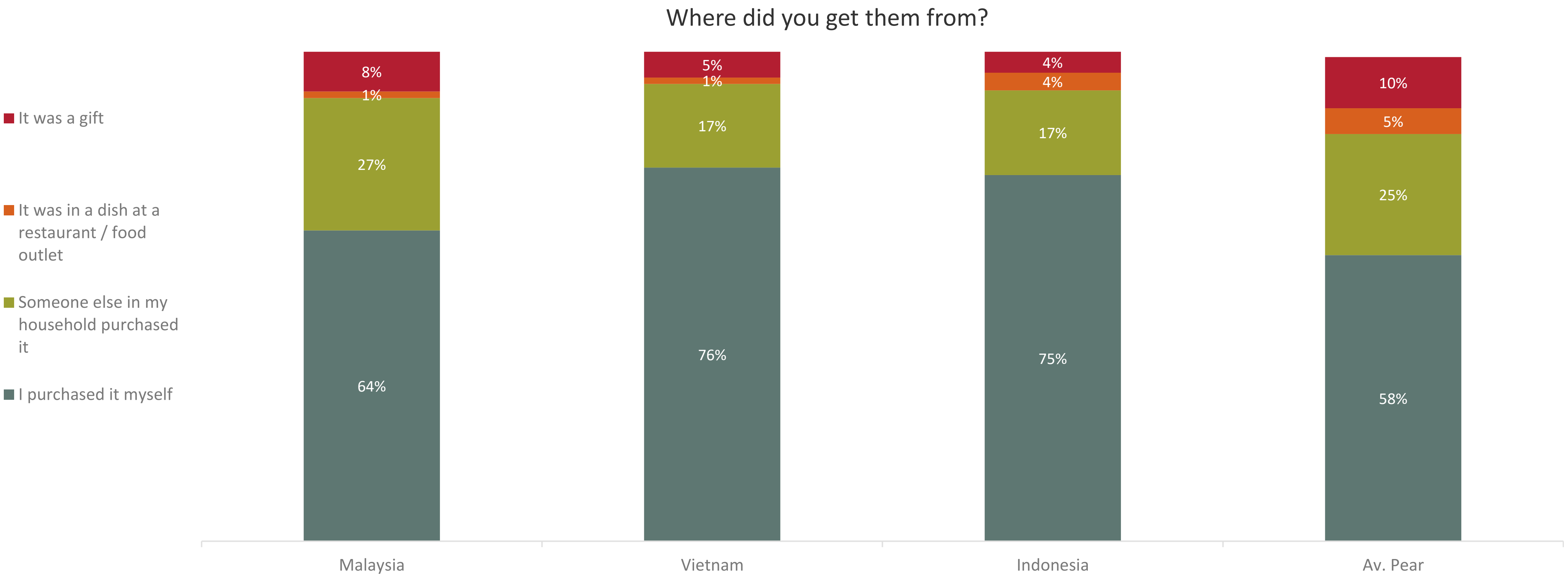
	81	76	77	74	92	76	74	57	74	76	139	86	11*

*Caution: Low Base

Most people purchase Pears themselves, though in Malaysia someone else from the household may also purchase

Pear



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	81	76	77	74	92	76	74	57	74	76	139	86	11*

*Caution: Low Base

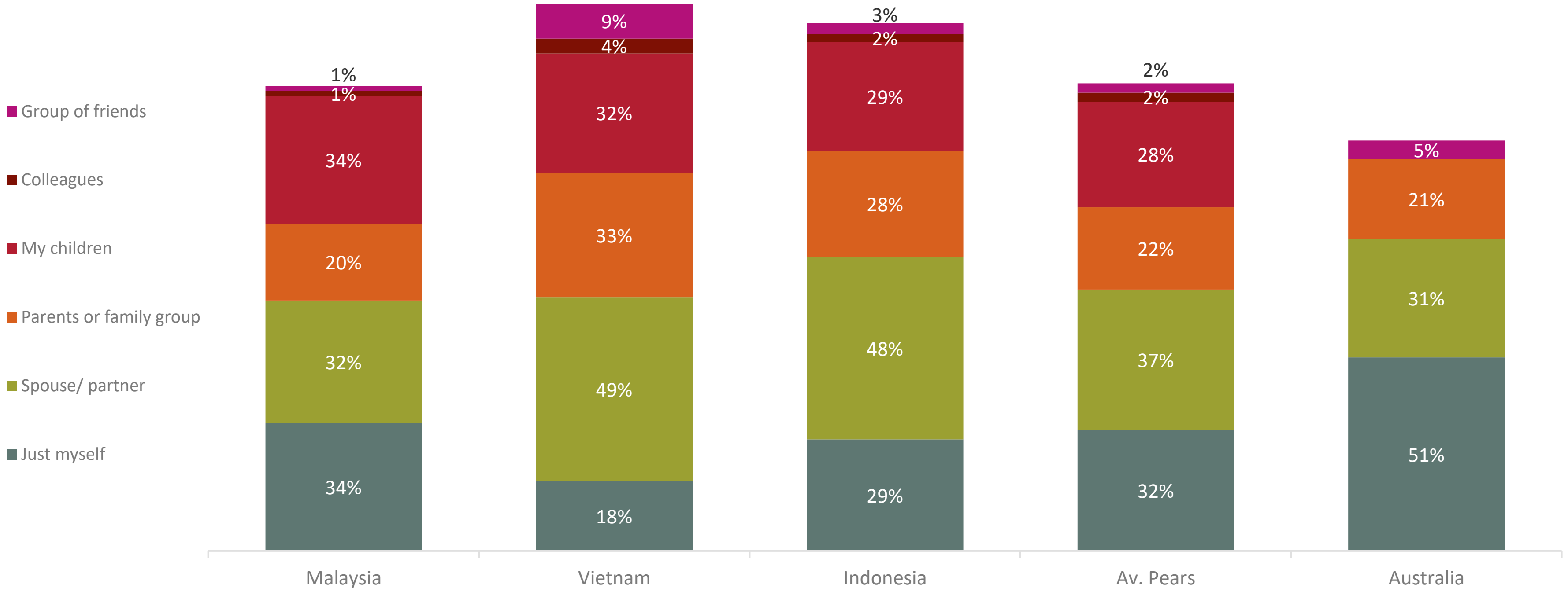
Pears are consumed with a spouse or partner or broader family group. There is a skew to eating alone in Malaysia

Pear

Who were you with?

32%

Of consumption of pears (on average) is alone.



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	81	76	77	74	92	76	74	57	74	76	139	86	11*

Hort Innovation

There is a range of reasons why people choose to eat different fruits & vegetables. There are
6 universal consumer needs pillars that drive this choice for consumers globally

The 6 needs pillars are universal across commodities and global markets






Tasty	Quick & Easy	Healthy & Nutritious	Indulgence	Physical & Mental Energy	Connection
All about: Taste, Refreshment, and Enjoyment	*All about:* Convenience Simplicity, and Ease	*All about:* Guilt-free, Nourishing and Sensible	*All about:* Comfort, Relaxation and Self Care	*All about:* Energy, Uplift, and Reinvigoration	*All about:* Bonding, Celebration and Creating Memories

In priority markets, the most important reasons why people choose to consume Pears are for something tasty, quick & easy and healthy & nutritious

66%

of people in priority markets consume Pears for something

Tasty

48%

of people in priority markets consume Pears for something

Quick & Easy

41%

of people in priority markets consume Pears for something

Healthy & Nutritious

Taste is the most important consumption driver across all markets, followed by quick and easy in Malaysia, Connection in Vietnam and Health & Nutrition in Indonesia

Pear

Which were important when choosing to consume?

	Malaysia	Vietnam	Indonesia	Av	Aus
Tasty	68%	59%	71%	61%	63%
Quick & Easy	55%	43%	45%	44%	66%
Healthy & Nutritious	31%	43%	49%	32%	30%
Indulgence	35%	36%	38%	32%	25%
Physical & Mental Energy	39%	22%	32%	30%	30%
Connection	19%	51%	37%	25%	13%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	81	76	77	74	92	76	74	57	74	76	139	86	11*

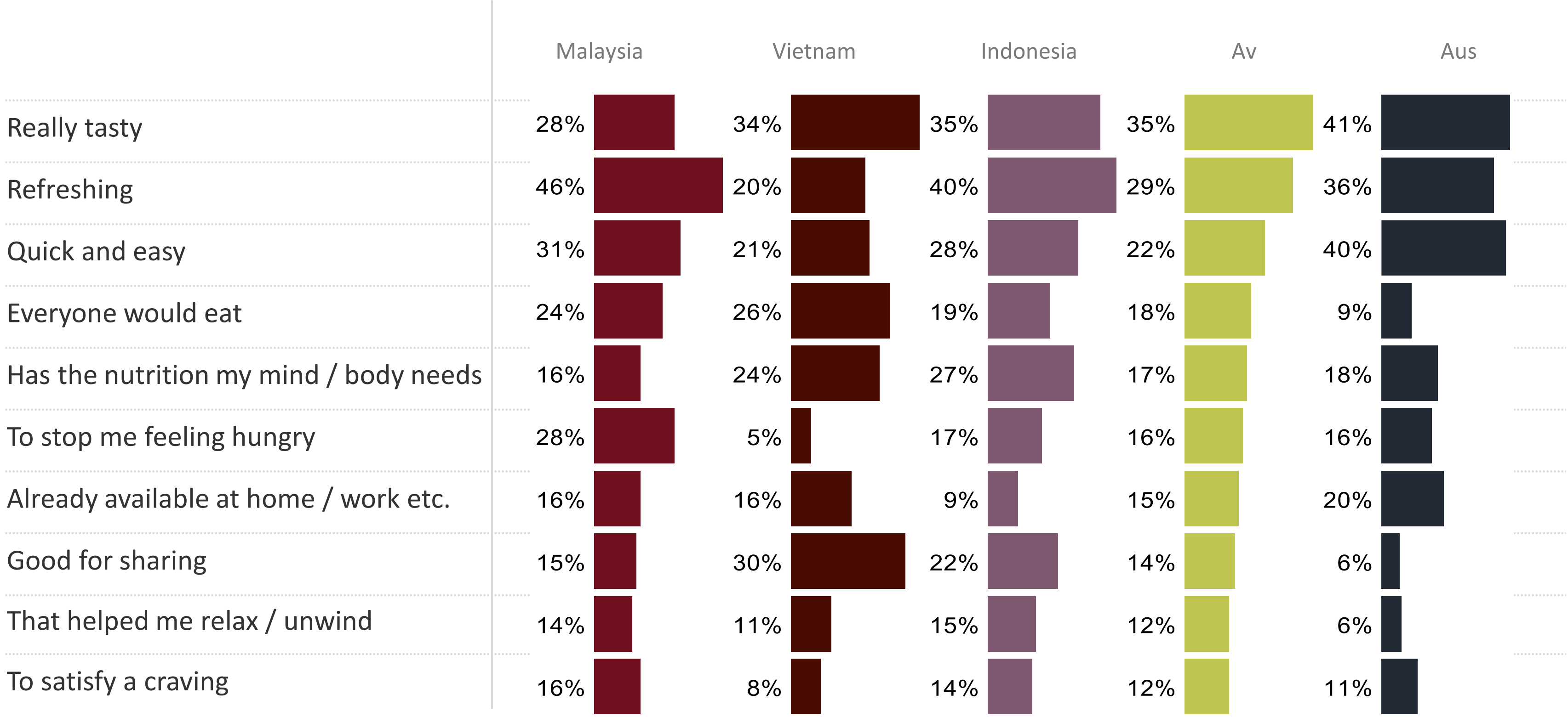
*Caution: Low Base

Hort Innovation

When we investigate in more detail, refreshing is important in Malaysia and Indonesia and tasty in Vietnam and Indonesia

Pear

Which were important when choosing to consume?



KANTAR

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N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	81	76	77	74	92	76	74	57	74	76	139	86	11*

*Caution: Low Base

Hort Innovation

More functionally, consumers are looking for Pears that are sweet while still being light and refreshing

34%

of people in priority markets are looking for Pears that are

Sweet

32%

of people in priority markets are looking for Pears that have

Refreshing Taste

30%

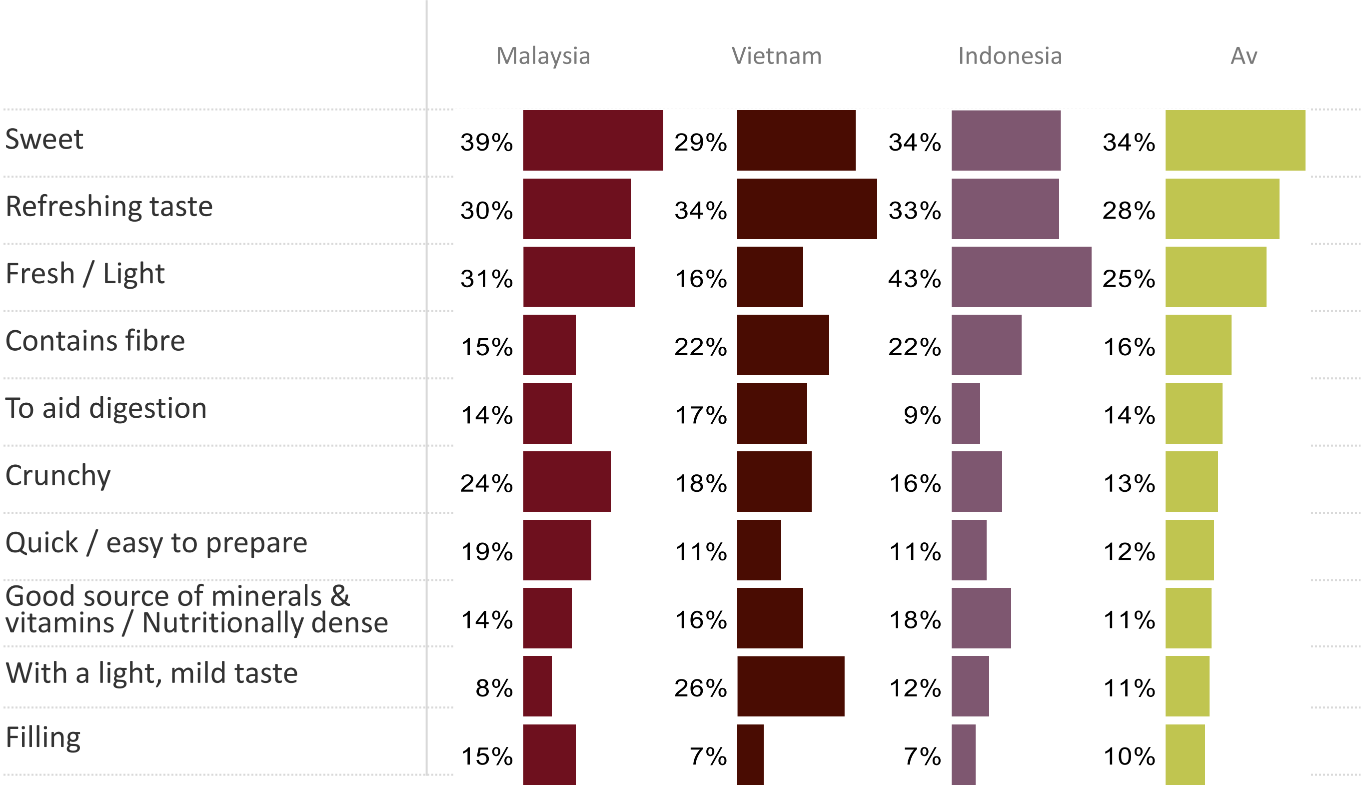
of people in priority markets are looking for Pears that are

Fresh / Light

Functionally, consumers are looking for sweet, refreshing taste and in Malaysia and Indonesia fresh and light. In Vietnam consumers also look for a light, mild taste

Pear

What were you looking for when you consumed?



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	81	76	77	74	92	76	74	57	74	76	139	86	11*

*Caution: Low Base

Hort Innovation

When it comes to the premium opportunity, consumers are looking for Pears that are fresher, sweeter, more appetizing, and are in the right state of ripeness

52%

of people in priority markets are looking for premium Pears that are

Fresher

35%

of people in priority markets are looking for premium Pears that are

Sweeter

30%

of people in priority markets are looking for premium Pears that are

More appetizing (not bruised)

28%

of people in priority markets are looking for premium Pears that are

In the right state of ripeness

Premium quality is characterised by freshness, sweetness and in Vietnam more appetising

Pear

What does premium quality mean to you?

	Malaysia	Vietnam	Indonesia	Av
Fresher	57%	49%	49%	43%
Sweeter	32%	38%	36%	34%
More flavour	22%	24%	28%	25%
Right state of ripeness	26%	36%	22%	25%
I trust its safety	15%	30%	33%	21%
More appetizing (e.g. not bruised, damaged)	19%	46%	24%	20%
Organic / free from pesticides	24%	30%	34%	20%
Higher in vitamins and minerals	22%	28%	34%	18%
Locally grown / produced in my area	9%	7%	17%	15%
Lasts longer	12%	26%	18%	14%

Source: Kantar HIA International Demand Study 2023

	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
N=	81	76	77	74	92	76	74	57	74	76	139	86	11*

*Caution: Low Base

Bruising easily is the biggest barrier to overcome with pear consumption, followed by price and exciting alternatives.

Apples and Bananas are considered worthy substitutes

Barriers to Consumption

Bruise Easily	Price	Exciting Alternatives
24% (priority market average)	23% (priority market average)	22% (priority market average)

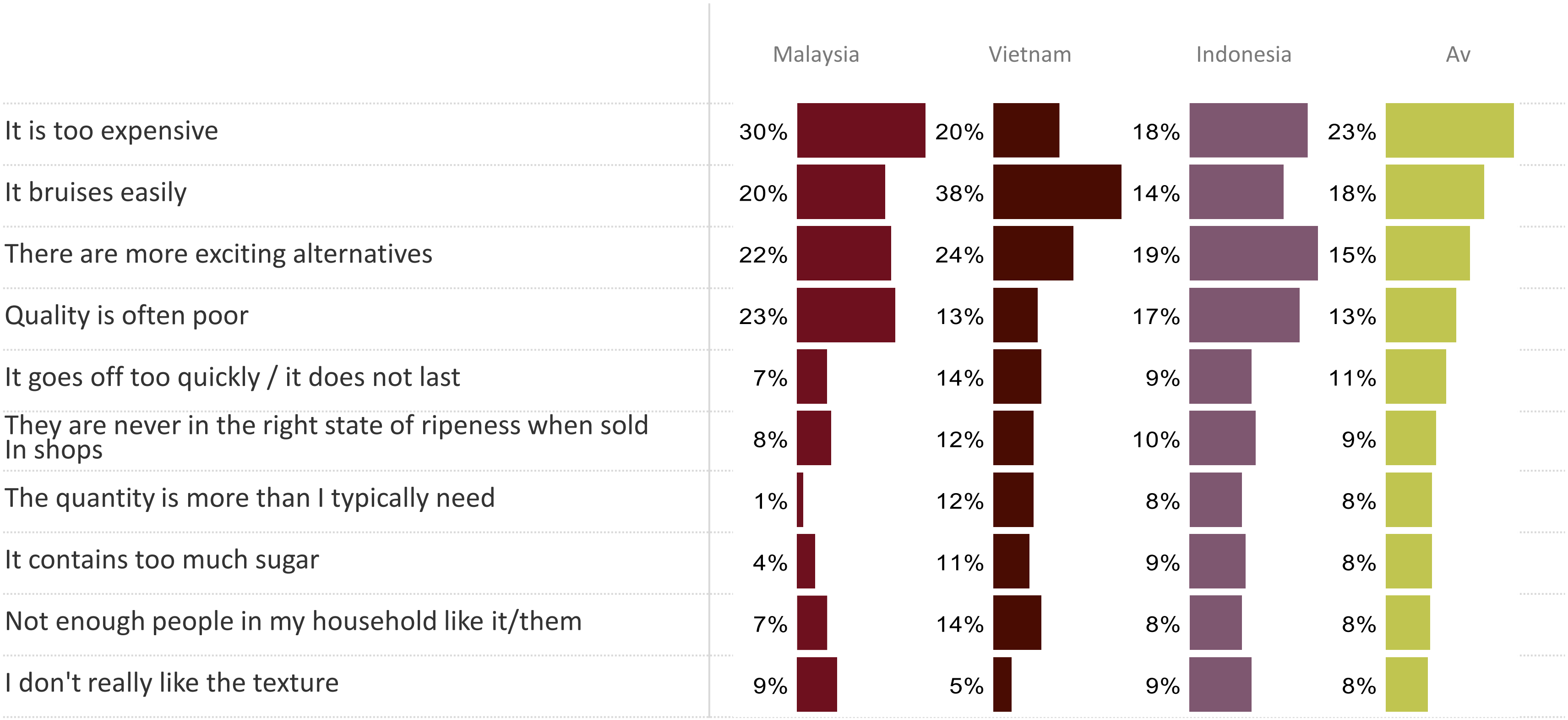
Leading Substitutes

Apples	Banana	Mango
53% (priority market average)	45% (priority market average)	39% (priority market average)

Barriers in priority markets are price, more exciting alternatives and bruises easily in Vietnam

Pear

What are the reasons you may not choose?



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	81	76	77	74	92	76	74	57	74	76	139	86	11*

*Caution: Low Base

Hort Innovation

Apples, bananas and mangos are key substitutes across priority markets

Pear

What else would you typically consider having instead?

	Malaysia	Vietnam	Indonesia	Av
Apple	62%	42%	55%	47%
Bananas	50%	37%	48%	37%
Mango	45%	29%	42%	23%
Melon	28%	29%	39%	20%
Strawberries	16%	26%	15%	20%
Citrus fruits	22%	20%	13%	19%
Kiwifruit	27%	17%	18%	19%
Table Grapes	19%	30%	11%	18%
Papaya	39%	18%	32%	16%
Pineapple	19%	13%	12%	16%

Source: Kantar HIA International Demand Study 2023

	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
N=	81	76	77	74	92	76	74	57	74	76	139	86	11*

*Caution: Low Base

Recommendation: How to drive export growth in Australian Pears

Pear

1. Focus on Strategic Priority Markets

Focus on markets where category **penetration is high** and consumers are **willing to pay a premium** for quality Pears (ie. **Indonesia, Malaysia and Vietnam**). Leverage already **high appeal for Australian Melons in Indonesia and Vietnam**, and **improve appeal in Malaysia** to drive incremental growth in Australian Pear exports.

2. Deliver Core Consumer Needs

Deliver the core consumer needs across priority markets with Pears that have a **refreshing taste, are healthy & nutritious**, and **are a convenient indulgence**. Ensure Pears are at or above par for being **sweet, fresh and light, are a good source of vitamins and minerals, that serve as a healthy lunch or snack fruit.**

3. Leverage Premium Advantage

Maximise the premium opportunity by delivering Pears that are fresher, sweeter, are free of pesticides, and are in the right state of ripeness.

4. Reduce Consumption Barriers

Address perceptions that Pear are **too expensive , bruise easily, and are less exciting than alternatives,** to minimise consumer drift to close substitutes like Apples, Bananas and Mangoes**.**

'Where to Play'

'How to Win'

KANTAR

3.10
Raspberries

i. Market prioritisation
Leverage the strategic framework to prioritize markets based on consumer behaviour, perception and market access

ii. Commodity profiling
In-depth data profiling of how the commodity is consumed across markets, premium triggers and barriers

Hort Innovation

4 key considerations when interpreting the outputs of the Market Prioritisation

1\. No Existing Technical Market Access

2\. Markets with Existing Trade

3\. Premium Opportunities

4\. Focus of Investment

1. No Existing Technical Market Access

Existing technical market access for a commodity was **intentionally NOT included** in the evaluation of addressability

Rationale:

- This project was designed to identify attractive and addressable **future** growth geographies therefore the analysis was not restricted by current arrangements
- This research is intended to **support and inform industry** decisions regarding the progress of any potential future or ongoing market access or market improvement request

2. Markets with Existing Trade

While the addressability calculation includes data on general market access and trade, it intentionally does not include whether Australia currently trades in a particular commodity

Rationale:

- The objective of this analysis is to provide an objective assessment of whether a market is attractive and addressable independent of current arrangements
  - If a market that we are currently trading with for a particularly commodity is shown NOT to be a ‘Strategic Priority’, this does NOT mean that we should consider withdrawing from this market.
  - However, we recommend re-evaluating the relative focus of investment in this market, and consider other markets when looking for **future** growth opportunities

3. Premium Opportunity

In evaluating attractive and addressable export markets, we have intentionally used data that shows where premium opportunities can be found

Rationale:

- The overall objective of this project was to identify **profitable** growth opportunities for commodities in the future, and Australian commodities will have more chance of growing profitably where they have a better chance for commanding a price premium
    - High commodity penetration in a market has also been used to evaluate attractiveness, but this analysis favours markets where there is a larger opportunity for Australian products to command a **premium**.

4. Focus of Investment

The evaluation and prioritisation of export markets into the 4 quadrants of attractiveness and addressability **is intended to be only one input into decision making** about **where to focus investment**

Rationale:

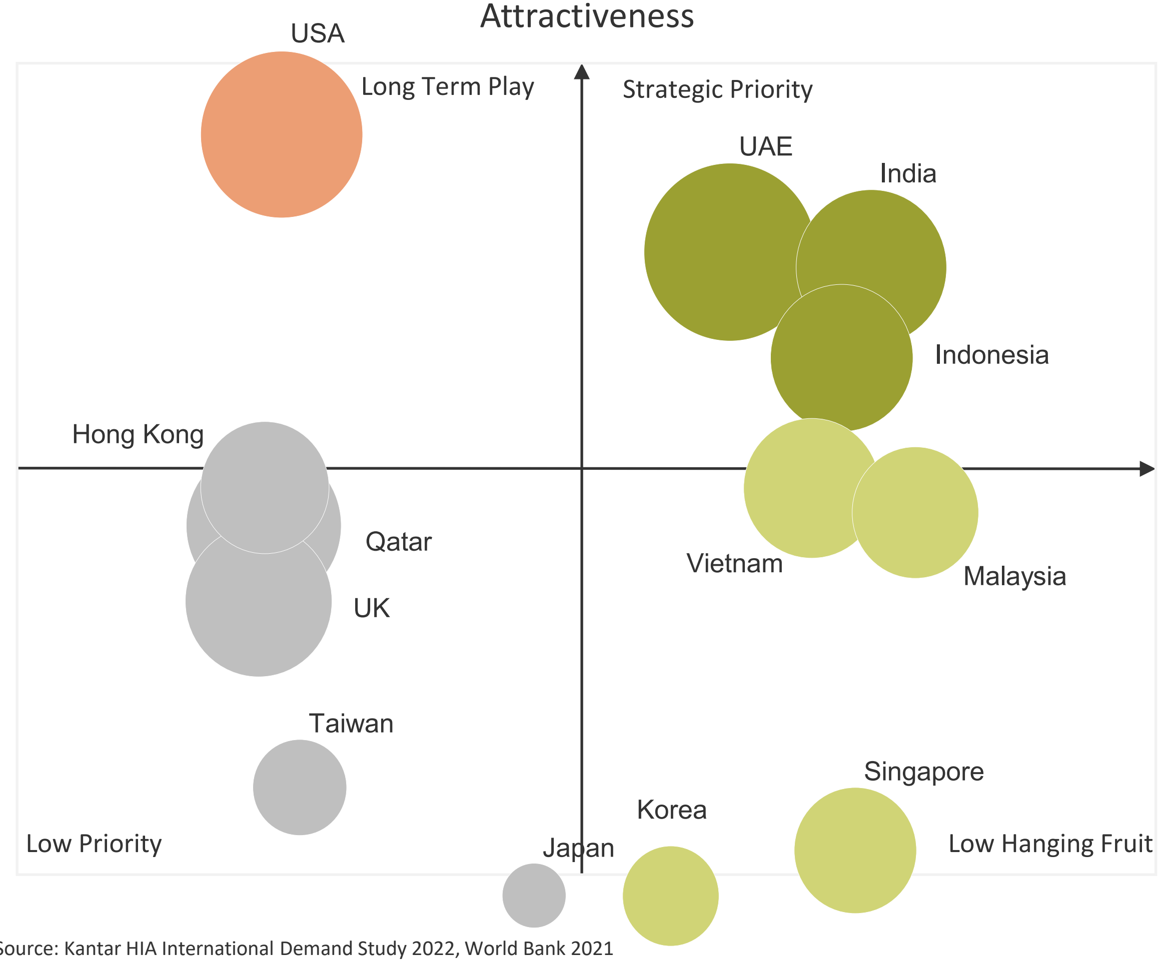
- The objective of this project was primarily to offer a consumer lens into commodity consumption, to enable export decisions to be informed by more robust consumer data (while still included additional market factor data from previous Deloitte analysis)
  - Export decisions should be made using all available information including the economics of local growers and exporters and this report forms one input into that decision process

We have identified 3 strategic priority markets that represent the most attractive and appealing export opportunity for Australian raspberries, based on consumer preference and behaviour

Raspberries

- **Strategic priority**
- **Low hanging fruit**
- **Long term play**
- **Low priority**

Size of the bubble = penetration



Source: Kantar HIA International Demand Study 2022, World Bank 2021

Raspberries: Strategic priorities

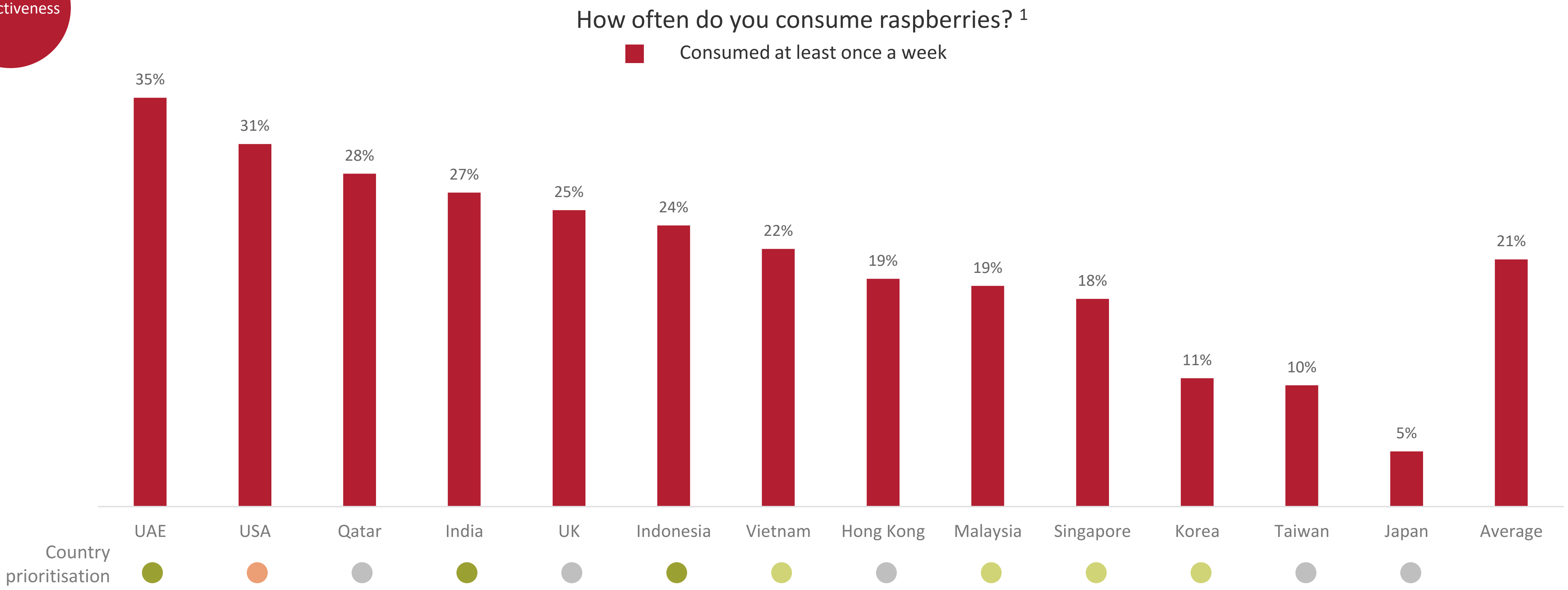
Raspberries

	India	Indonesia	UAE
STRATEGIC IMPLICATIONS	Despite the low income per capita, India represents a strong export opportunity with greater likelihood for raspberries to command a premium over other commodities and a strong willingness to pay	Indonesia has strong Australian appeal and a high claimed likelihood to pay 1.5x coupled with a large and growing population	High penetration and per capita income make UAE a strong opportunity for Raspberries
ATTRACTIVENESS	• High category penetration (27%) • Strong claimed willingness to pay 1.5x	• Moderately high category penetration (24%) • Highest claimed willingness to pay a premium	• Highest category penetration • Moderate claimed willingness to pay 1.5x
ADDRESSABILITY	• Strongest Australian appeal across the markets • Greater likelihood to command a premium over other commodities in the market	• Strong Australian appeal • Slightly less likely to command a premium over other commodities	• Moderate Australian appeal • Slightly less likely to command a premium over other commodities

Raspberries are most frequently consumed in the UAE and USA with 1/3 of consumers in these markets consuming them weekly

Raspberries

Attractiveness



1 An adjustment factor has been applied to results in India, Indonesia, Vietnam, UAE and Qatar to account for overclaim in these markets – see appendix for further detail

Source: Kantar HIA International Demand Study 2022

Strategic priority   Low hanging fruit   Long term play   Low priority

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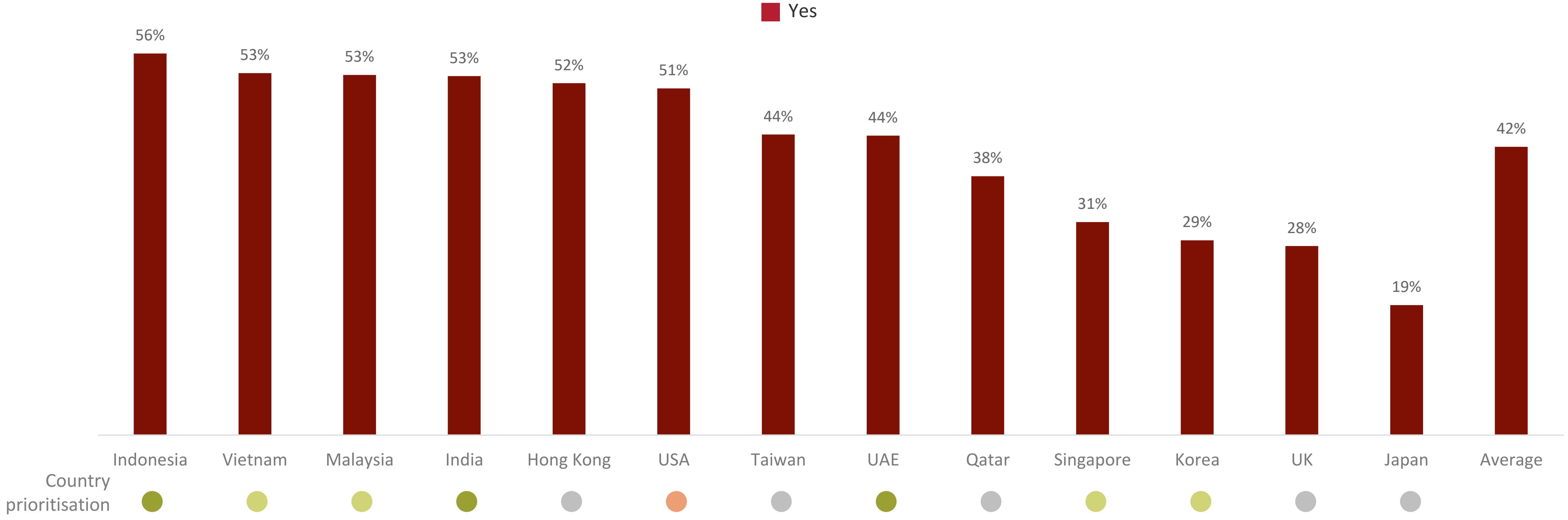
Hort Innovation

Across all markets raspberries have the potential to command a premium price

Raspberries

Attractiveness

Would you be willing to pay 1.5x (or 50%) more for premium quality raspberries? [1,2]



1 Consumers asked if they would be willing to pay 50% more than they currently pay in their market (no price specified)
2 An adjustment factor has been applied to results in India, Indonesia, Vietnam, UAE and Qatar to account for overclaim in these markets – see appendix for further detail
Source: Kantar HIA International Demand Study 2022

Strategic priority | Low hanging fruit | Long term play | Low priority

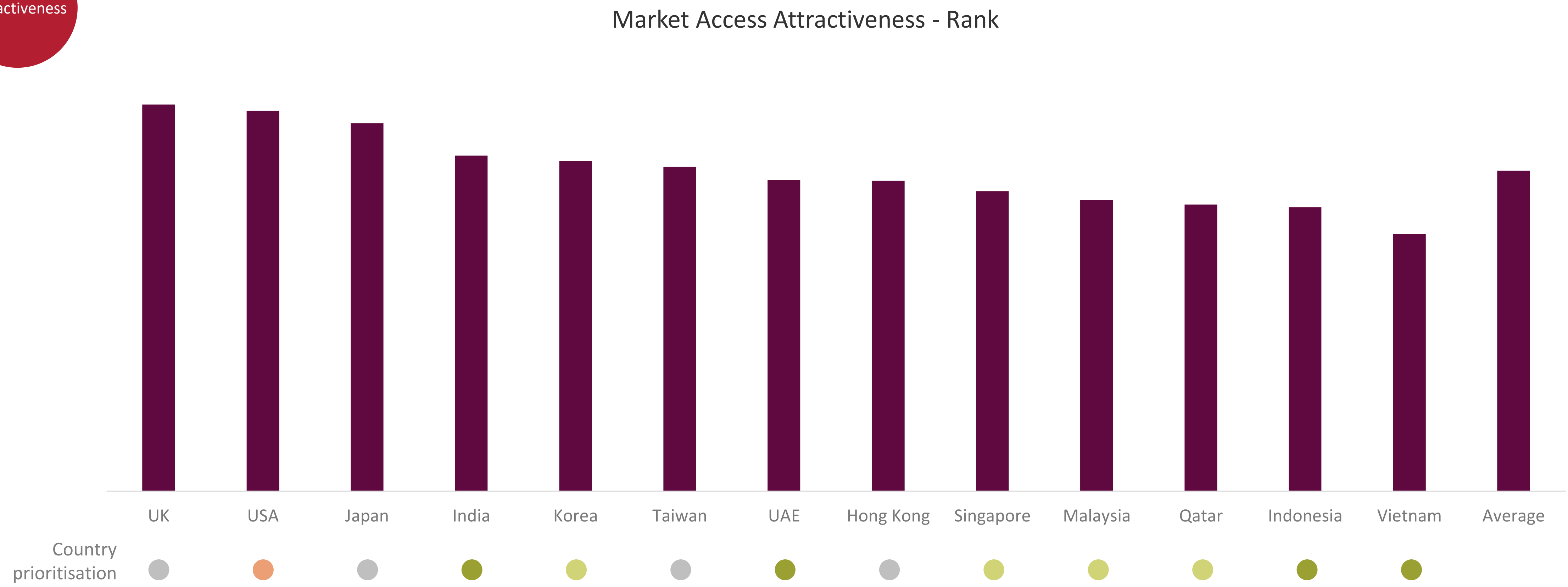
KANTAR

Hort Innovation

Although all markets are attractive, more affluent markets with larger populations rank more highly

Raspberries

Attractiveness



Source: Deloitte Access Economics 2021

Strategic priority · Low hanging fruit · Long term play · Low priority

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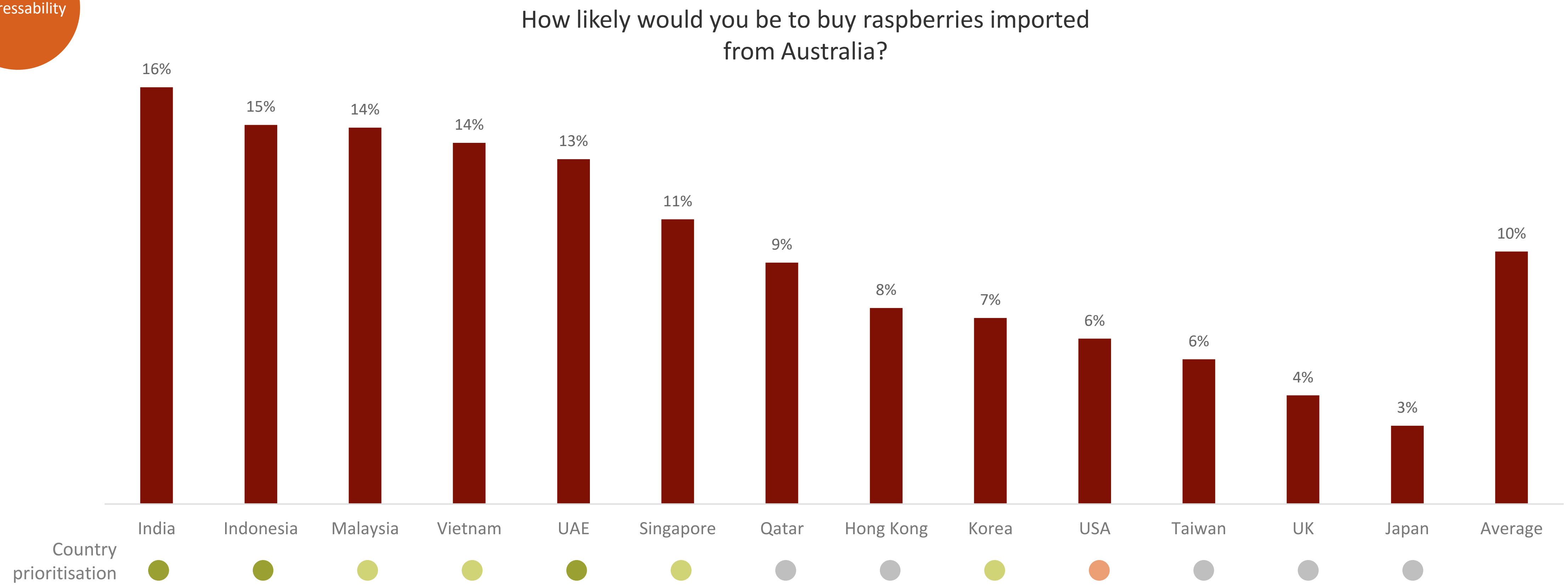
Raspberries have strong Australian appeal particularly in India, Indonesia and Hong Kong

Raspberries

Addressability



KANTAR

Source: Kantar HIA International Demand Study 2022

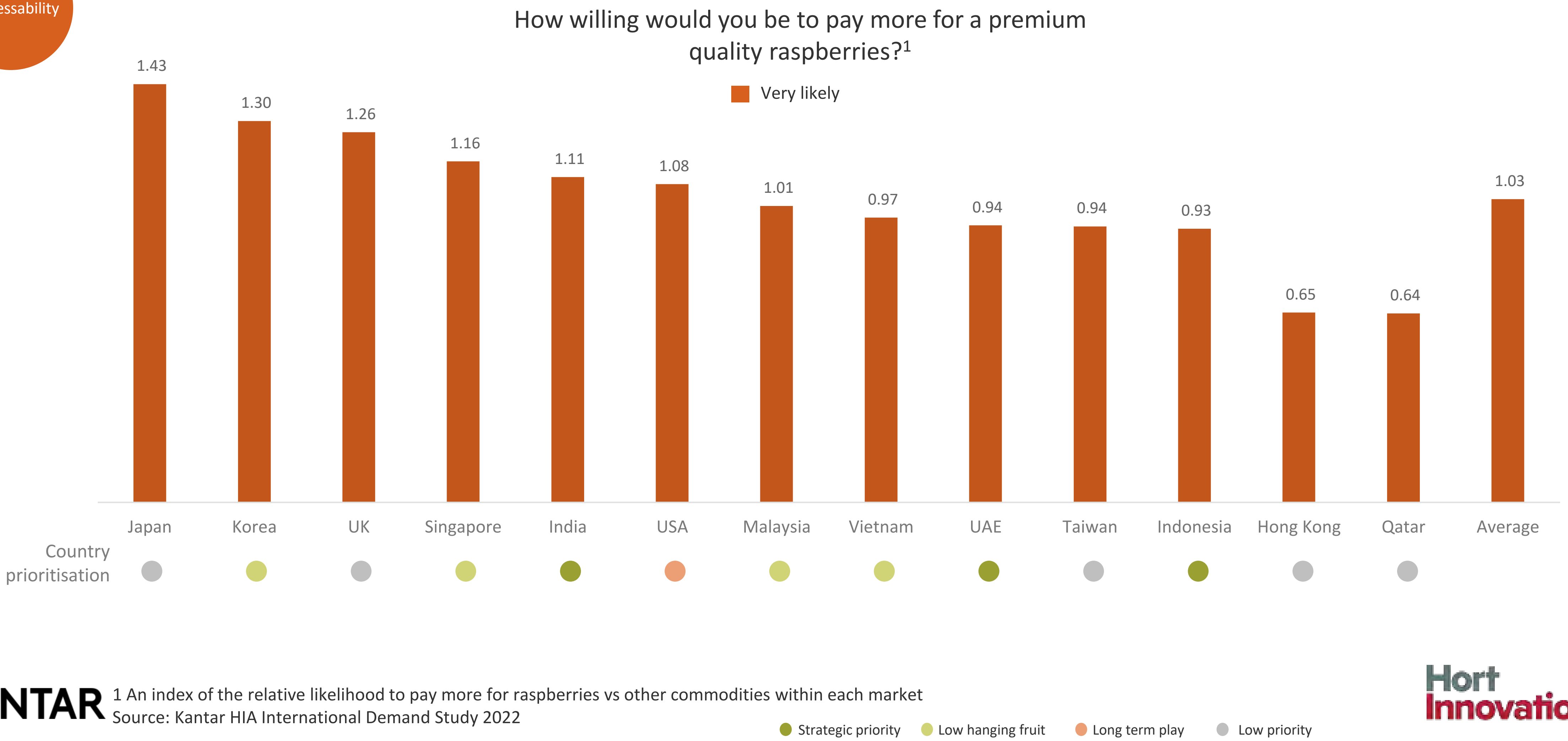
Strategic priority · Low hanging fruit · Long term play · Low priority

Hort Innovation

Relative desire for premium vs other commodities is strongest in Japanese, Korean and UK markets

Raspberries

Addressability



KANTAR

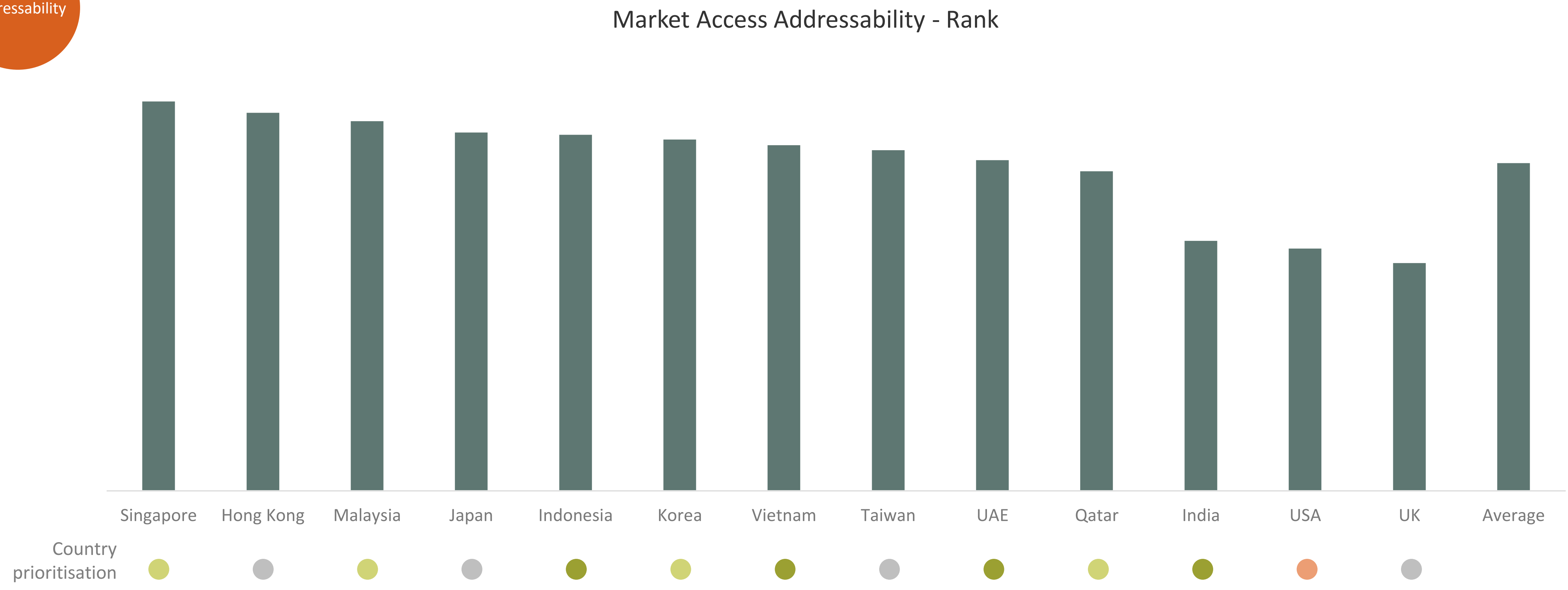
1 An index of the relative likelihood to pay more for raspberries vs other commodities within each market
Source: Kantar HIA International Demand Study 2022

Hort Innovation

Some markets rank as more addressable due to the ease of trade, market risk and value chain competitiveness

Raspberries

Addressability



Source: Deloitte Access Economics 2021

Strategic priority Low hanging fruit Long term play Low priority

KANTAR

3.10
Raspberries

i. Market prioritisation

Leverage the strategic framework to prioritize markets based on consumer behaviour, perception and market access

ii. Commodity profiling

In-depth data profiling of how the commodity is consumed across markets, premium triggers and barriers

Hort Innovation

The prioritisation revealed x3 markets ripe for Raspberries export. The next section will deep dive into Raspberries consumption across markets

Raspberries

	USA	UK	Singapore	India	Japan	Hong Kong	South Korea
Market priorities	Long term play	Low priority	Low hanging fruit	Strategic priority	Low priority	Low priority	Low hanging fruit

	Malaysia	UAE	Qatar	Taiwan	Vietnam	Indonesia
Market priorities	Low hanging fruit	Strategic priority	Low priority	Low priority	Low hanging fruit	Strategic priority

Strategic priority · Low hanging fruit · Long term play · Low priority

Raspberries consumption snapshot

Raspberries

	India	Indonesia	UAE
HOW OFTEN (P1W pen.)	27%	24%	35%
WHEN	Breakfast Snack between lunch and dinner	Dessert Lunch	Snack Lunch Breakfast
HOW	Fresh on its own In a salad	In a salad Fresh on its own	Fresh on its own As part of a snack
WHY	Tasty Connection	Tasty Indulgence	Tasty Indulgence
WHERE	At home	At home	At home
WHO WITH	With Family	With Family	With Family

Source: Kantar HIA International Demand Study 2022

Raspberries: Strategic Imperatives

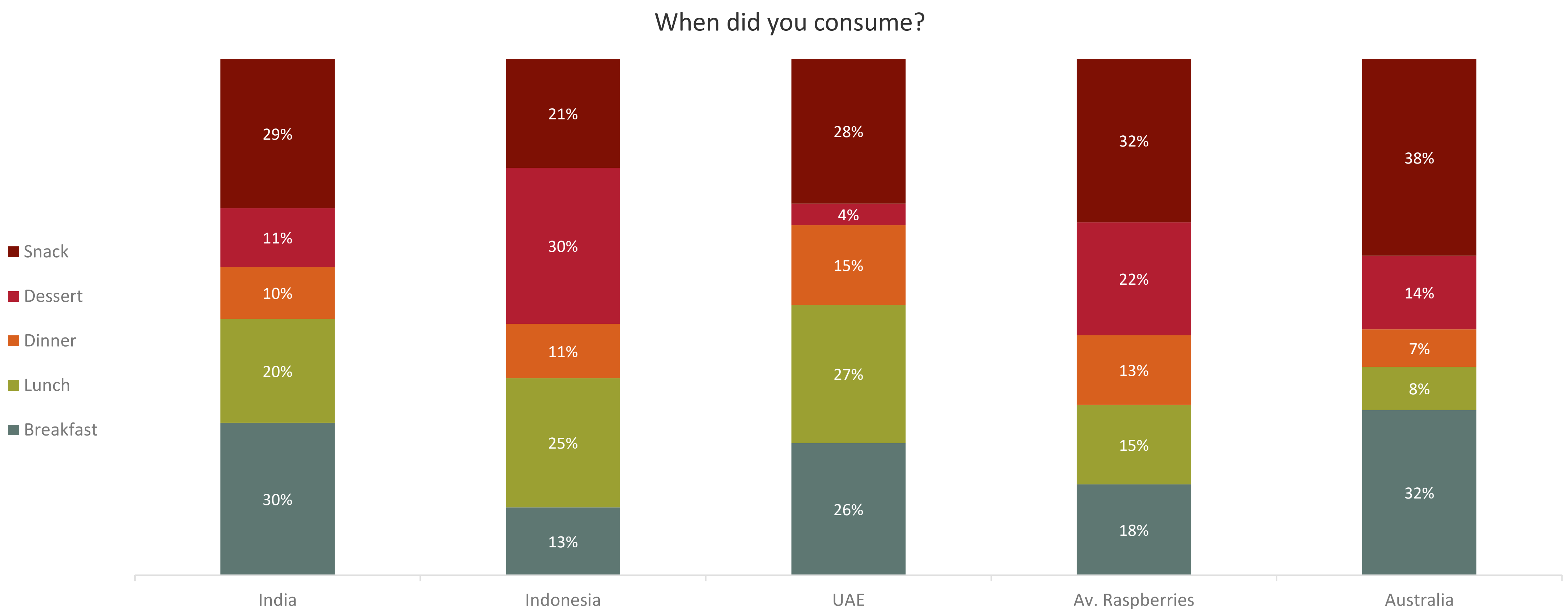
Raspberries

	India	Indonesia	UAE
CONSUMER PREFERENCES	As a tasty breakfast or snack between lunch and dinner, fresh on its own or in a salad, at home with family	As a tasty and indulgent dessert or lunch, in a salad or fresh on its own, at home with family	As a tasty and indulgent snack, lunch or breakfast, fresh on its own or as part of a snack, at home with family
NEEDS TO SATISFY	Tasty Connection	Tasty Indulgence	Tasty Indulgence
FUNCTIONAL ATTRIBUTES	Refreshing Taste Sweet	Fresh & Light Sweet	Refreshing Taste Fresh & Light Rich in anti-oxidants
PREMIUM OPPORTUNITY	Fresher More flavour	Fresher High in vitamins & minerals	Fresher High in vitamins & minerals
BARRIERS TO OVERCOME	Too expensive More exciting alternatives	Too expensive More exciting alternatives	Too expensive
KEY SUBSTITUTES	Apple Bananas Mangoes	Apple Bananas	Apple Bananas

Source: Kantar HIA International Demand Study 2022

In India and UAE Raspberries are consumed at Breakfast or as a snack, in Indonesia at lunch or dessert

Raspberries



Note: Australian data for "Berries" overall
Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	151	151	150	149	162	150	151	114	147	149	152	168	21*

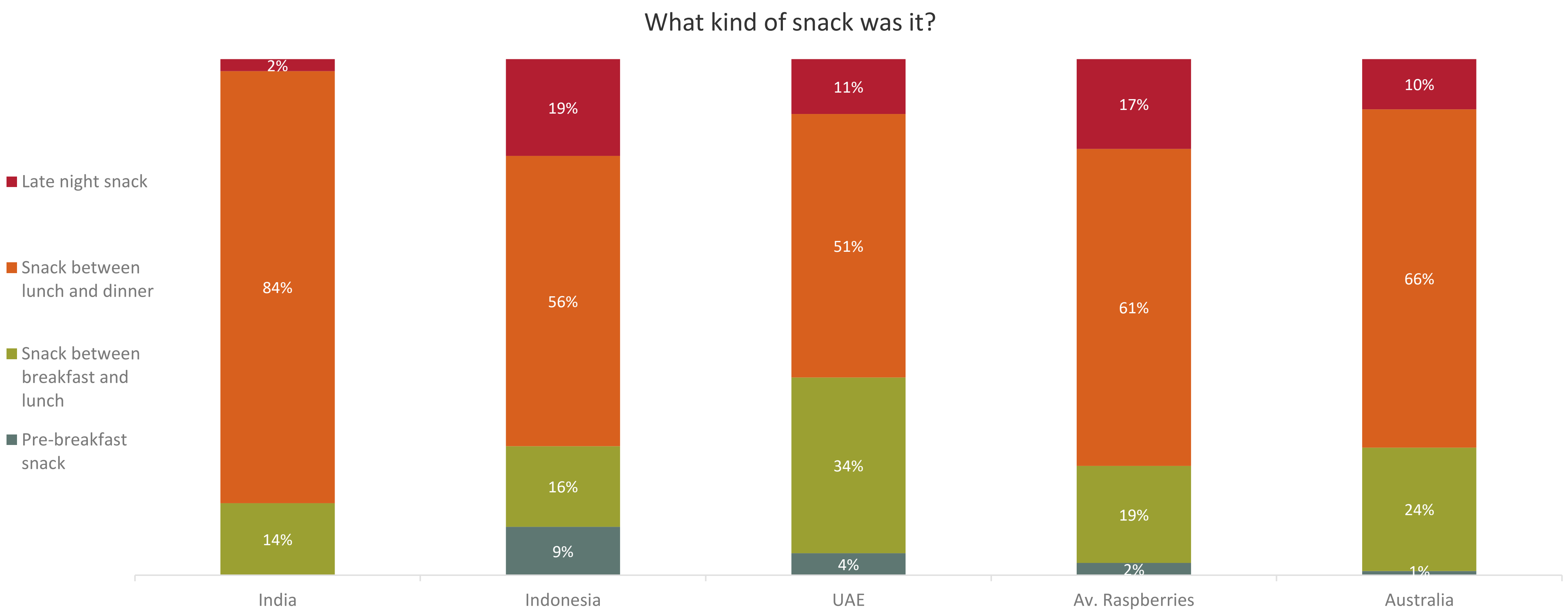
*Caution: Low Base

KANTAR

Hort Innovation

When consumed as a snack, Raspberries tend to be consumed between lunch and dinner with a skew to between breakfast and lunch in UAE

Raspberries



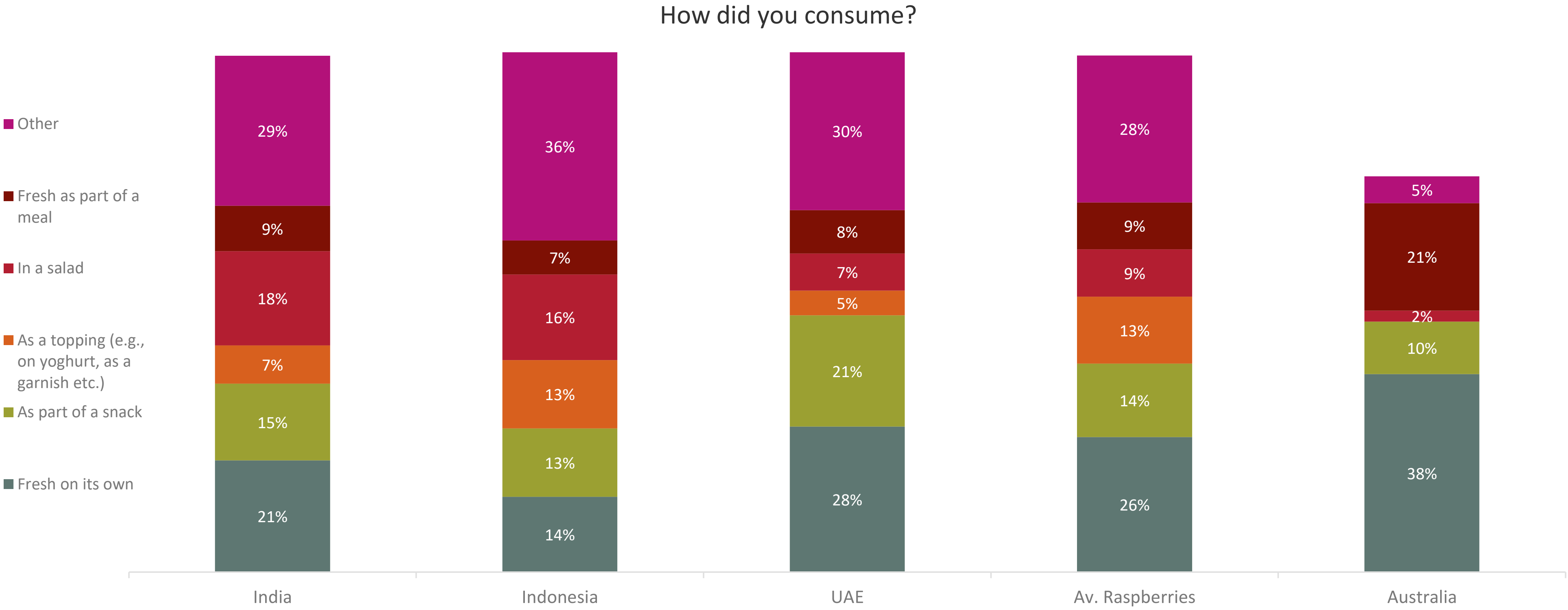
Note: Australian data for “Berries” overall
Source: Kantar HIA International Demand Study 2023

KANTAR

Hort Innovation

Raspberries are most often consumed fresh on their own across priority markets followed by in a salad in India and Indonesia and as part of a snack in UAE

Raspberries



Note: Australian data for "Berries" overall

'Other' = In a smoothie / frappe / juice, As an ingredient in baking, As an ingredient in cooking, Cooked on its own, For decoration / show only, As part of an alcoholic drink e.g. cocktail and To make baby food / puree

Source: Kantar HIA International Demand Study 2023

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	151	151	150	149	162	150	151	114	147	149	152	168	21*

*Caution: Low Base

KANTAR

Hort Innovation

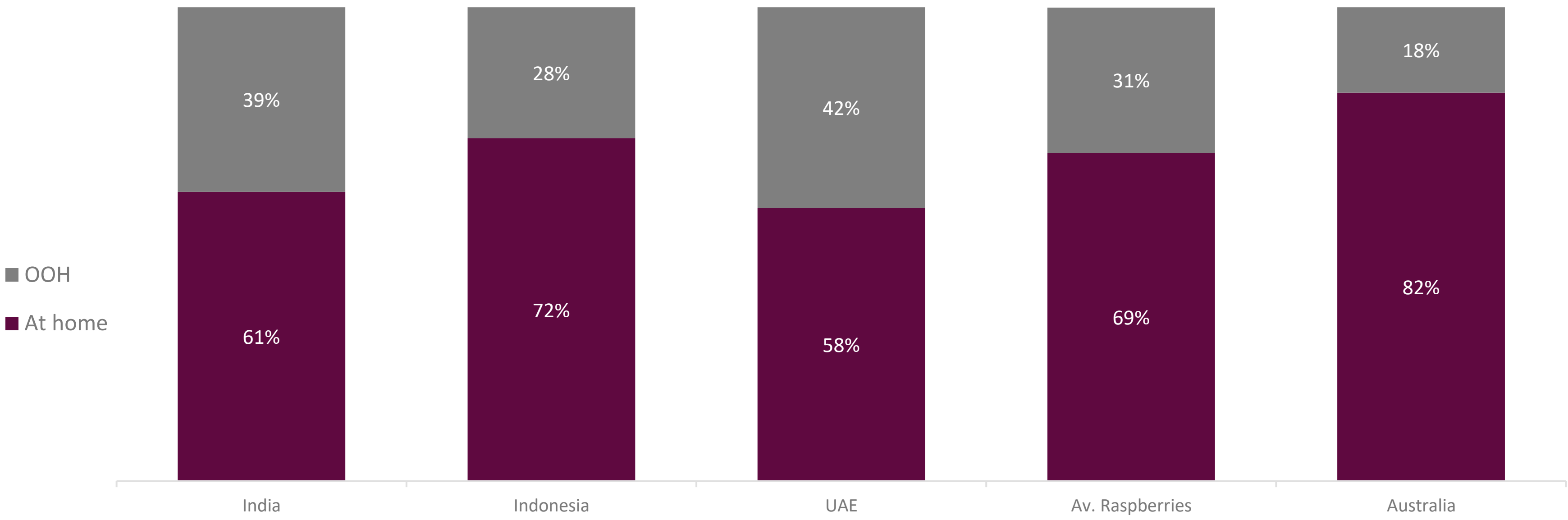
Most people consume Raspberries at home. India and UAE skew more out of home

Raspberries

Where were you?

69%

Of consumption of raspberries is in the home, this varies only slightly by market



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	151	151	150	149	162	150	151	114	147	149	152	168	21*

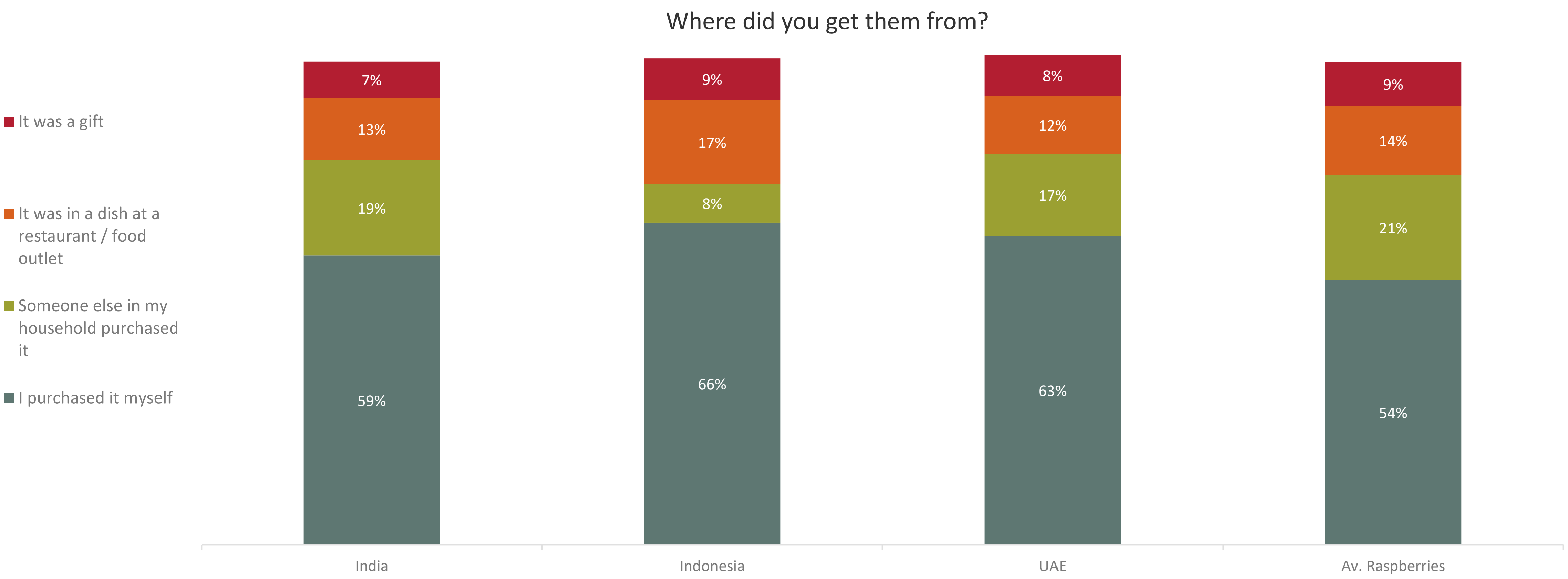
*Caution: Low Base

KANTAR

Hort Innovation

Most people purchase Raspberries themselves

Raspberries



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	151	151	150	149	162	150	151	114	147	149	152	168	21*

*Caution: Low Base

Hort Innovation

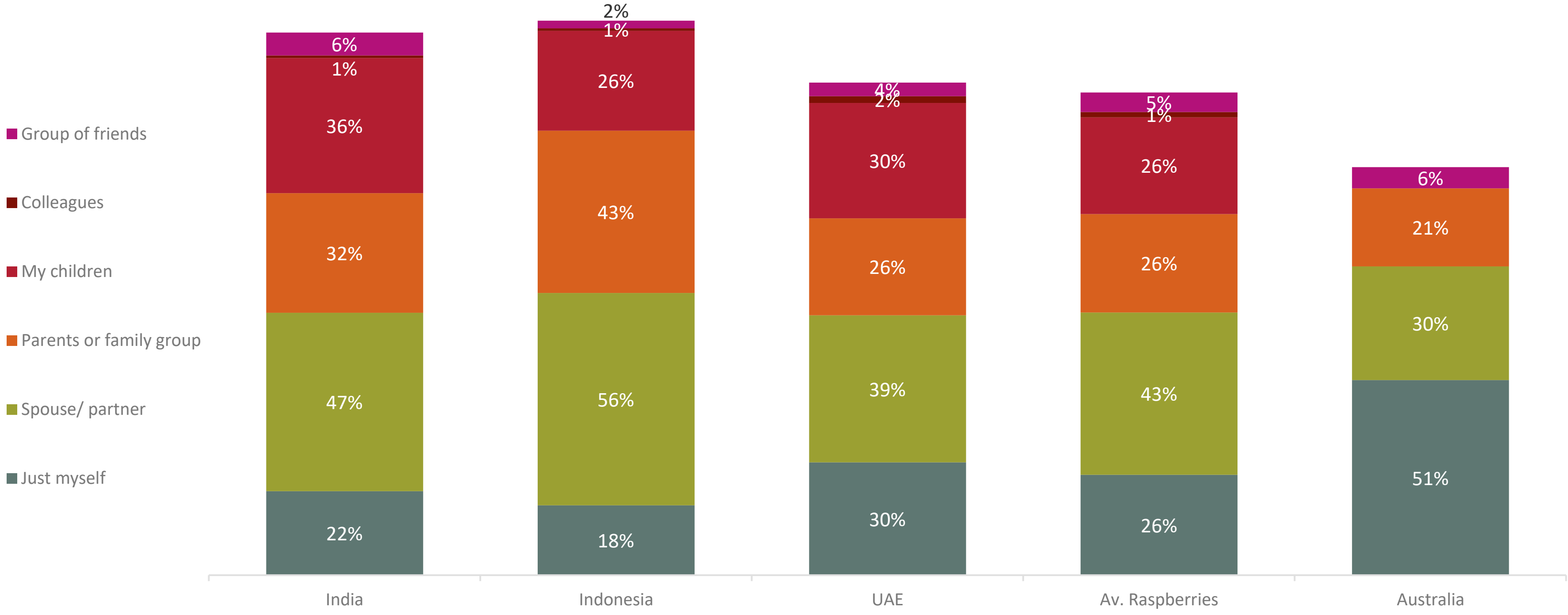
Raspberries are typically consumed with a spouse or partner or with a broader family group

Raspberries

Who were you with?

43%

Of consumption of raspberries (on average) is with a partner/spouse.



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	151	151	150	149	162	150	151	114	147	149	152	168	21*

There is a range of reasons why people choose to eat different fruits & vegetables. There are
6 universal consumer needs pillars that drive this choice for consumers globally

The 6 needs pillars are universal across commodities and global markets

Tasty

All about: Taste, Refreshment, and Enjoyment

Quick & Easy

All about: Convenience Simplicity, and Ease

Healthy & Nutritious

All about: Guilt-free, Nourishing and Sensible

Indulgence

All about: Comfort, Relaxation and Self Care

Physical & Mental Energy

All about: Energy, Uplift, and Reinvigoration

Connection

All about: Bonding, Celebration and Creating Memories

In priority markets, the most important reasons why people choose to consume Raspberries are for something tasty, indulgent and quick & easy

58%

of people in priority markets consume Raspberries for something

Tasty

45%

of people in priority markets consume Raspberries for an

Indulgence

43%

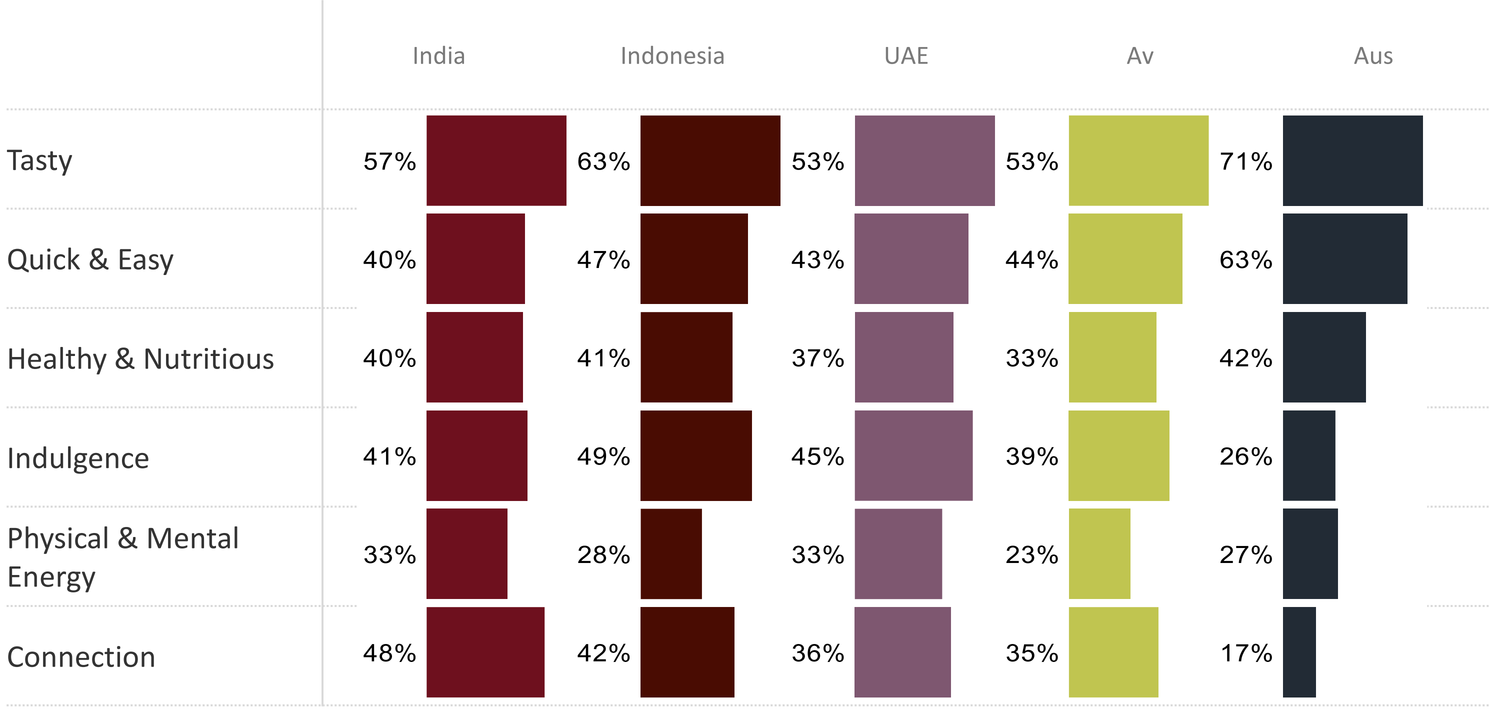
of people in priority markets consume Raspberries for something

Quick & Easy

Taste is the most important consumption driver across all markets, followed by quick and easy

Raspberries

Which were important when choosing to consume?



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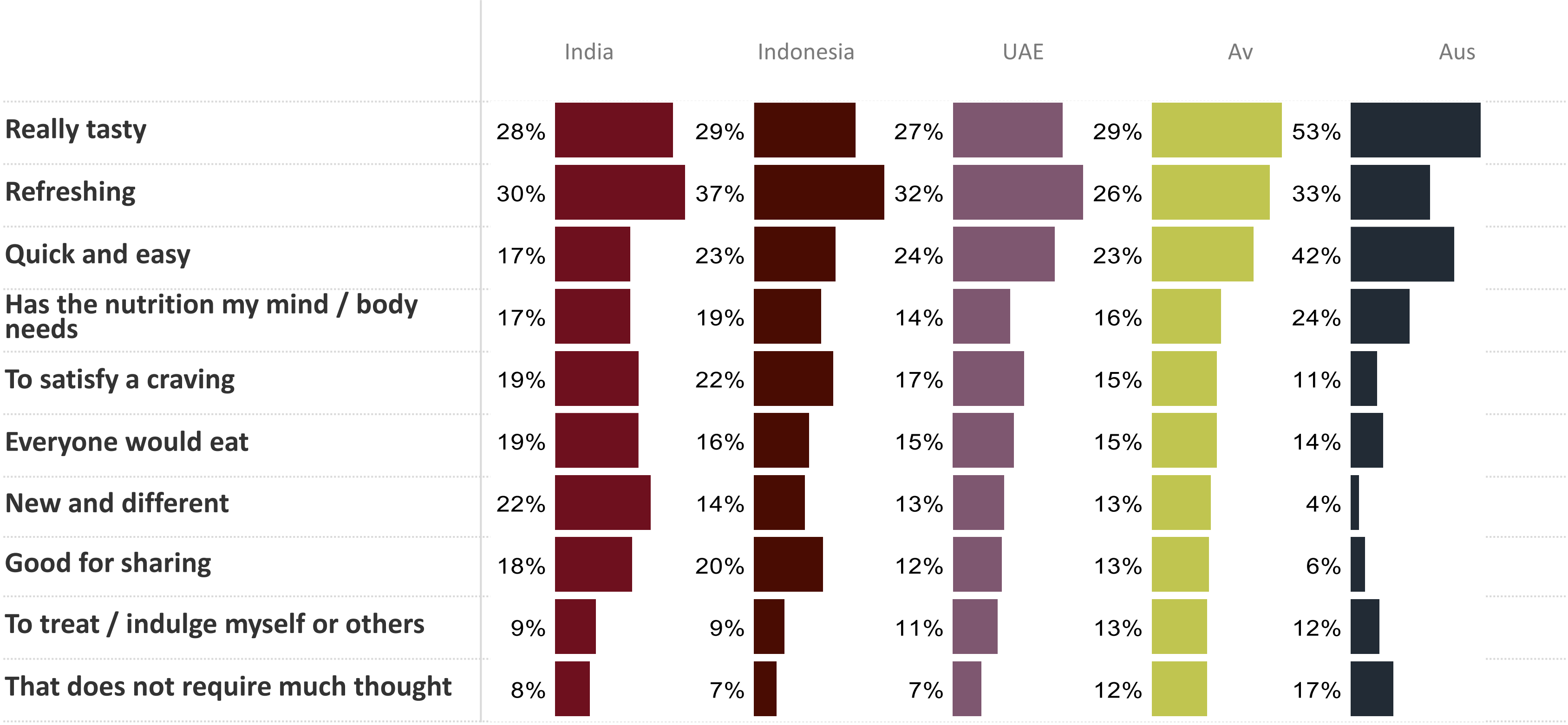
	151	151	150	149	162	150	151	114	147	149	152	168	21*

*Caution: Low Base

When we investigate in more detail, consumers in priority markets, ‘refreshing’ and ‘really tasty’ are important along with ‘quick and easy’ in Indonesia and UAE

Raspberries

Which were important when choosing to consume?



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	151	151	150	149	162	150	151	114	147	149	152	168	21*

*Caution: Low Base

More functionally, consumers are looking for Raspberries that are sweet while still being light and refreshing

24%

of people in priority markets are looking for Raspberries that are

Refreshing taste

24%

of people in priority markets are looking for Raspberries that are

Sweet

24%

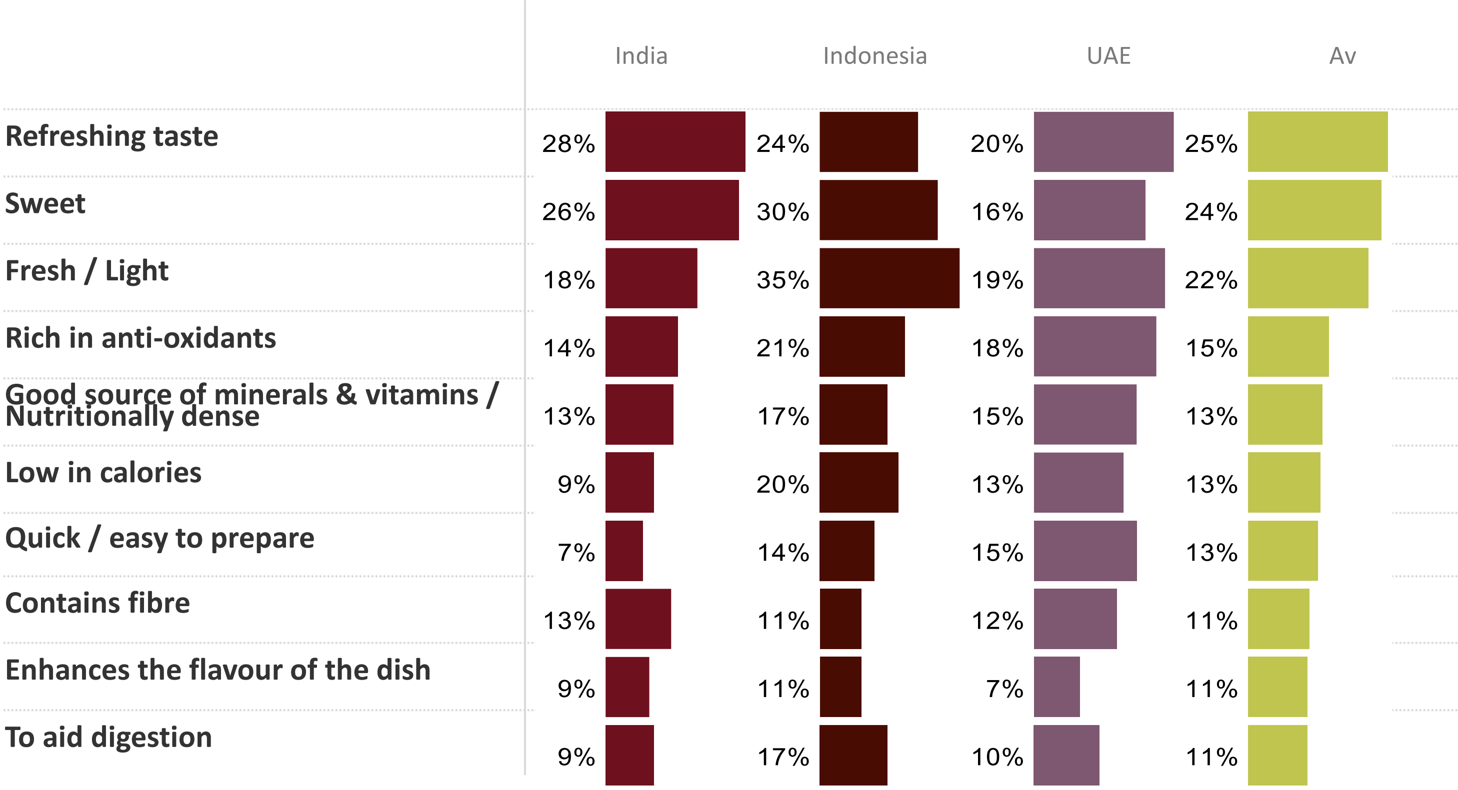
of people in priority markets are looking for Raspberries that are

Fresh / Light

In India consumers are looking for refreshing taste and sweet, Indonesia the focus is more on fresh / light as well as sweet and in UAE refreshing taste and fresh / light

Raspberries

What were you looking for when you consumed?



KANTAR

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	151	151	150	149	162	150	151	114	147	149	152	168	21*

*Caution: Low Base

Hort Innovation

When it comes to the premium opportunity, consumers are looking for Raspberries that are fresher, free of pesticides, are higher in vitamin & mineral content, and have more flavour

39%

of people in priority markets are looking for premium Raspberries that are

Fresher

31%

of people in priority markets are looking for premium Raspberries that are

Higher in vitamins and minerals

27%

of people in priority markets are looking for premium Raspberries that are

Free from pesticides

26%

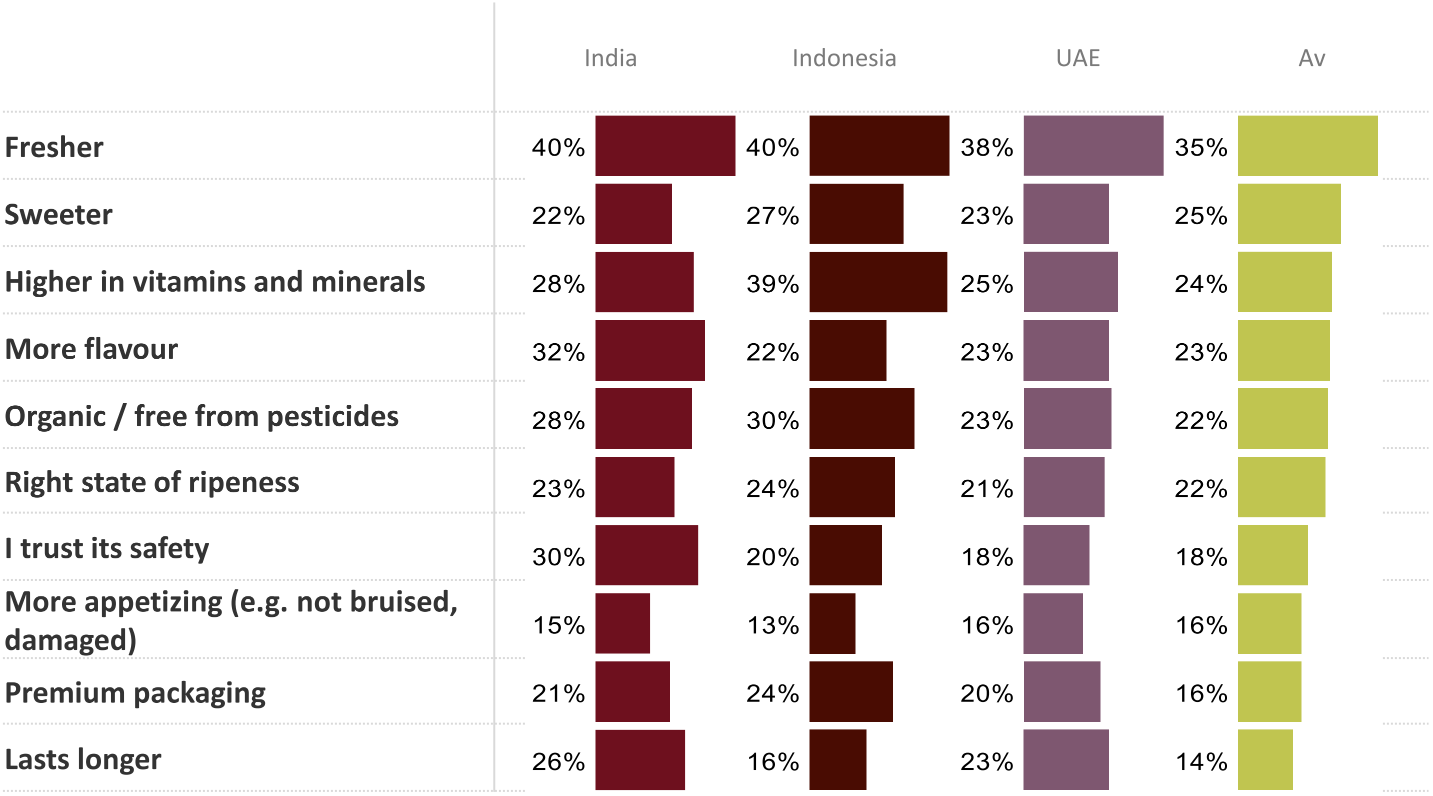
of people in priority markets are looking for premium Raspberries that have

More flavour

In India and Indonesia consumers characterise premium by freshness, higher in minerals and free of pesticides whilst in UAE, the focus is more on being fresher

Raspberries

What does premium quality mean to you?



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	151	151	150	149	162	150	151	114	147	149	152	168	21*

*Caution: Low Base

Hort Innovation

Price is the biggest barrier to overcome with raspberry consumption, followed by exciting alternatives and poor quality.

Apples and bananas are considered worthy substitutes

Barriers to Consumption

Price	Exciting Alternatives	Poor Quality
27% (priority market average)	16% (priority market average)	16% (priority market average)

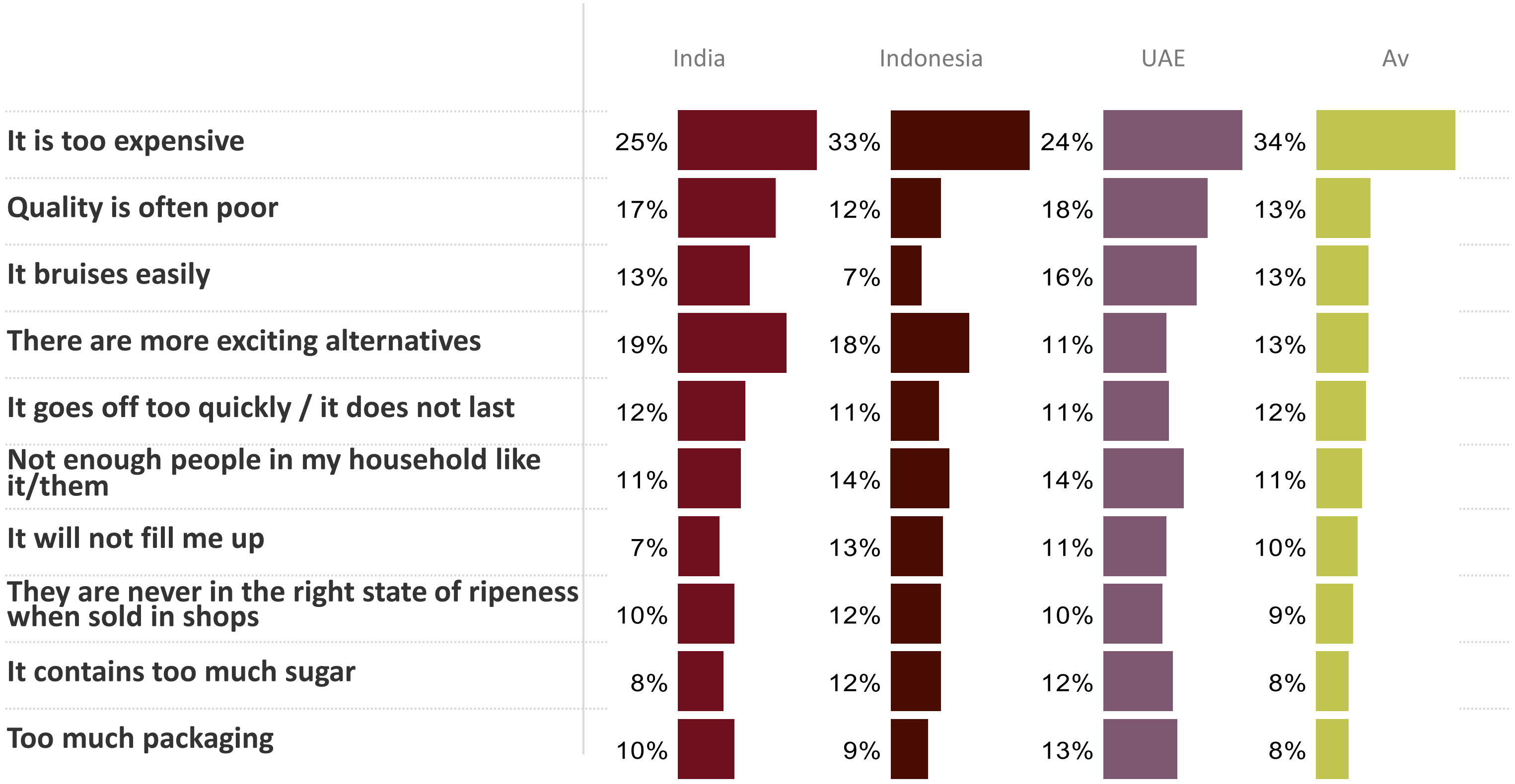
Leading Substitutes

Apples	Banana	Mango
37% (priority market average)	30% (priority market average)	26% (priority market average)

Price is a key barrier across priority markets

Raspberries

What are the reasons you may not choose?



Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	151	151	150	149	162	150	151	114	147	149	152	168	21*

*Caution: Low Base

Raspberries

Apples and Bananas are key substitutes across priority markets along with Mangos in India and Indonesia

What else would you typically consider having instead?

	India	Indonesia	UAE	Av
Blueberries	26%	13%	19%	26%
Apple	41%	38%	32%	25%
Strawberries	15%	28%	24%	23%
Bananas	30%	32%	28%	23%
Mango	29%	28%	20%	19%
Cherries	26%	8%	20%	16%
Blackberries	31%	11%	13%	16%
Kiwifruit	24%	16%	13%	15%
Melon	13%	24%	15%	14%
Pineapple	27%	14%	20%	14%

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Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	151	151	150	149	162	150	151	114	147	149	152	168	21*

*Caution: Low Base

Hort Innovation

Recommendation: How to drive growth in Australian Raspberries

Raspberries

1. Focus on Strategic Priority Markets

Focus on markets where category **penetration is high** and consumers are **willing to pay a premium** for quality Raspberries (ie. **India, UAE, and Indonesia**). **Improve knowledge and appeal for Australian Raspberries in all priority markets** to drive incremental growth in Australian Raspberry exports.

2. Deliver Core Consumer Needs

Deliver the core consumer needs across priority markets with Raspberries that have a **refreshing taste, and are an indulgence that is good for sharing**. Ensure Raspberries are at or above par for being **sweet, fresh and light, and refreshing, that serve as a healthy breakfast, lunch or snack fruit.**

3. Leverage Premium Advantage

Maximise the premium opportunity by delivering Raspberries that are fresher, higher in vitamins and minerals, sweeter, free of pesticides, and have more flavour.

4. Reduce Consumption Barriers

Address perceptions that Raspberries are **too expensive , are poor quality, and are less exciting than alternatives,** to minimise consumer drift to close substitutes like Apples, Bananas and Mangoes.

'Where to Play'

← *'How to Win'* →

KANTAR

3.11
Strawberries

i. Market prioritisation
Leverage the strategic framework to prioritize markets based on consumer behaviour, perception and market access

ii. Commodity profiling
In-depth data profiling of how the commodity is consumed across markets, premium triggers and barriers

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4 key considerations when interpreting the outputs of the Market Prioritisation

1.
No Existing Technical Market Access

2.
Markets with Existing Trade

3.
Premium Opportunities

4.
Focus of Investment

1. No Existing Technical Market Access

Existing technical market access for a commodity was **intentionally NOT included** in the evaluation of addressability

Rationale:

- This project was designed to identify attractive and addressable **future** growth geographies therefore the analysis was not restricted by current arrangements
- This research is intended to **support and inform industry** decisions regarding the progress of any potential future or ongoing market access or market improvement request

2. Markets with Existing Trade

While the addressability calculation includes data on general market access and trade, it intentionally does not include whether Australia currently trades in a particular commodity

Rationale:

- The objective of this analysis is to provide an objective assessment of whether a market is attractive and addressable independent of current arrangements
  - If a market that we are currently trading with for a particularly commodity is shown NOT to be a ‘Strategic Priority’, this does NOT mean that we should consider withdrawing from this market.
  - However, we recommend re-evaluating the relative focus of investment in this market, and consider other markets when looking for **future** growth opportunities

3. Premium Opportunity

In evaluating attractive and addressable export markets, we have intentionally used data that shows where premium opportunities can be found

Rationale:

- The overall objective of this project was to identify **profitable** growth opportunities for commodities in the future, and Australian commodities will have more chance of growing profitably where they have a better chance for commanding a price premium
    - High commodity penetration in a market has also been used to evaluate attractiveness, but this analysis favours markets where there is a larger opportunity for Australian products to command a **premium**.

4. Focus of Investment

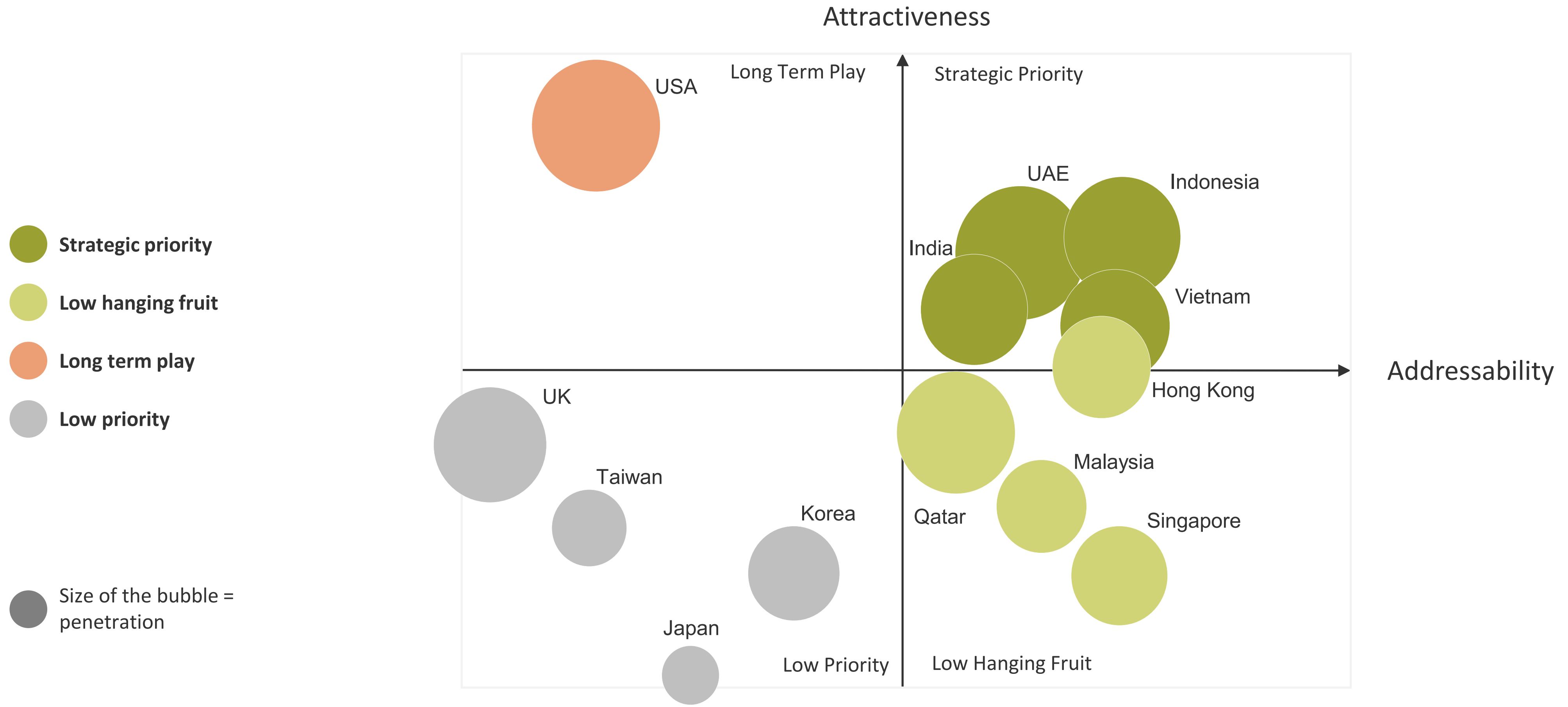
The evaluation and prioritisation of export markets into the 4 quadrants of attractiveness and addressability **is intended to be only one input into decision making** about **where to focus investment**

Rationale:

- The objective of this project was primarily to offer a consumer lens into commodity consumption, to enable export decisions to be informed by more robust consumer data (while still included additional market factor data from previous Deloitte analysis)
    - Export decisions should be made using all available information including the economics of local growers and exporters and this report forms one input into that decision process

We have identified 4 strategic priority markets that represent the most attractive and appealing export opportunity for Australian strawberries

Strawberry



Source: Kantar HIA International Demand Study 2022, World Bank 2021

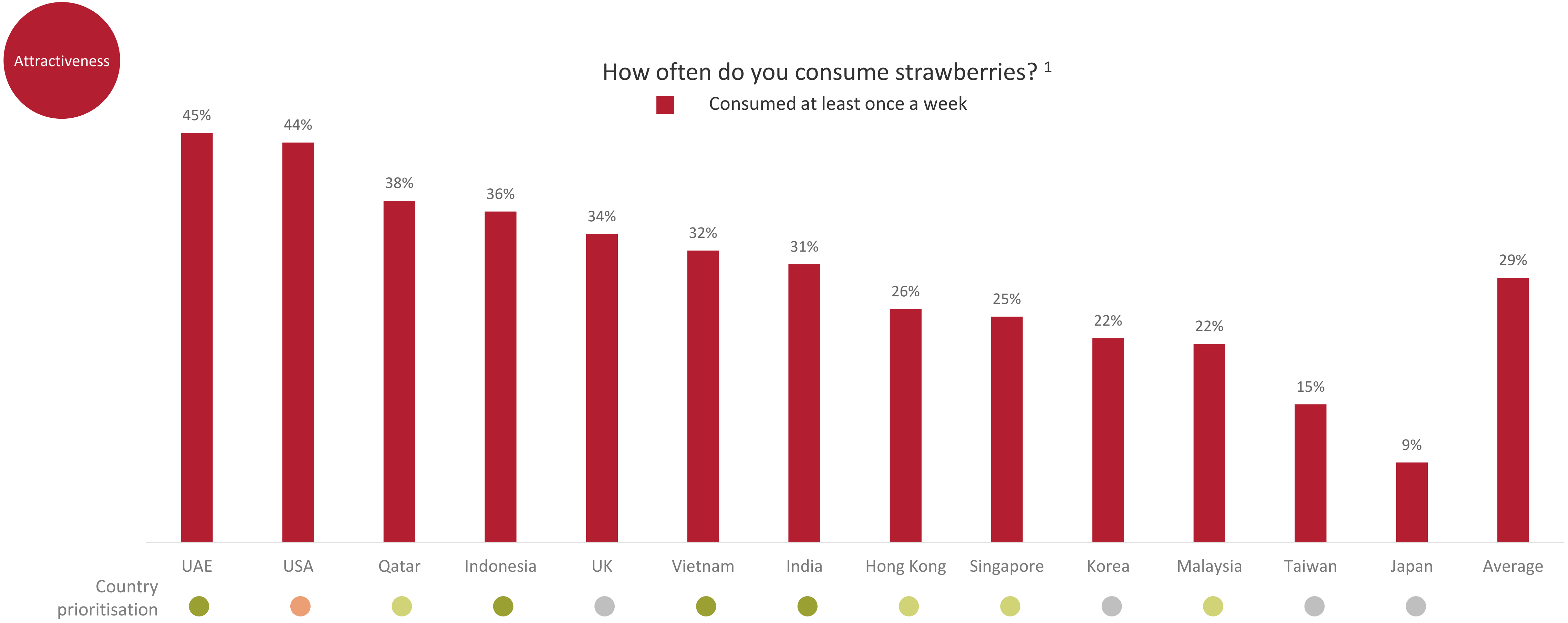
Strawberries: Strategic priorities

Strawberry

	India	Vietnam	Indonesia	UAE
STRATEGIC IMPLICATIONS	India represents a strong export opportunity given the sizable population, the ability to command a premium and strong Australian appeal	Vietnam represents a strong Strawberry export opportunity given the population size and strength of the Australian appeal and willingness to pay	Indonesia has a low income per capita, but sizeable population and strong desire for Australian	With high per capita income, there is a strong opportunity in the UAE given strong category penetration and a greate r likelihood to command a premium over other commodities
ATTRACTIVENESS	• Moderate category penetration (31%) • Strong claimed willingness to pay 1.5x	• Moderate category penetration (32%) • Very strong claimed willingness to pay 1.5x	• High category penetration (36%) • Highest claimed willingness to pay 1.5x	• Highest category penetration (45%) • Moderate claimed willingness to pay 1.5x
ADDRESSABILITY	• Strong Australian appeal • Greater likelihood to command a premium over other commodities	• Very strong Australian appeal relative to other markets • Moderate likelihood to command a premium over other commodities	• Very strong Australian appeal relative to other markets • Moderate likelihood to command a premium over other commodities	• Strong Australian appeal • Greater likelihood to command a premium over other commodities

Consumption of strawberries is highest in the UAE and USA where nearly 1 in 2 consumers eat them at least once a week

Strawberry



1 An adjustment factor has been applied to results in India, Indonesia, Vietnam, UAE and Qatar to account for overclaim in these markets – see appendix for further detail

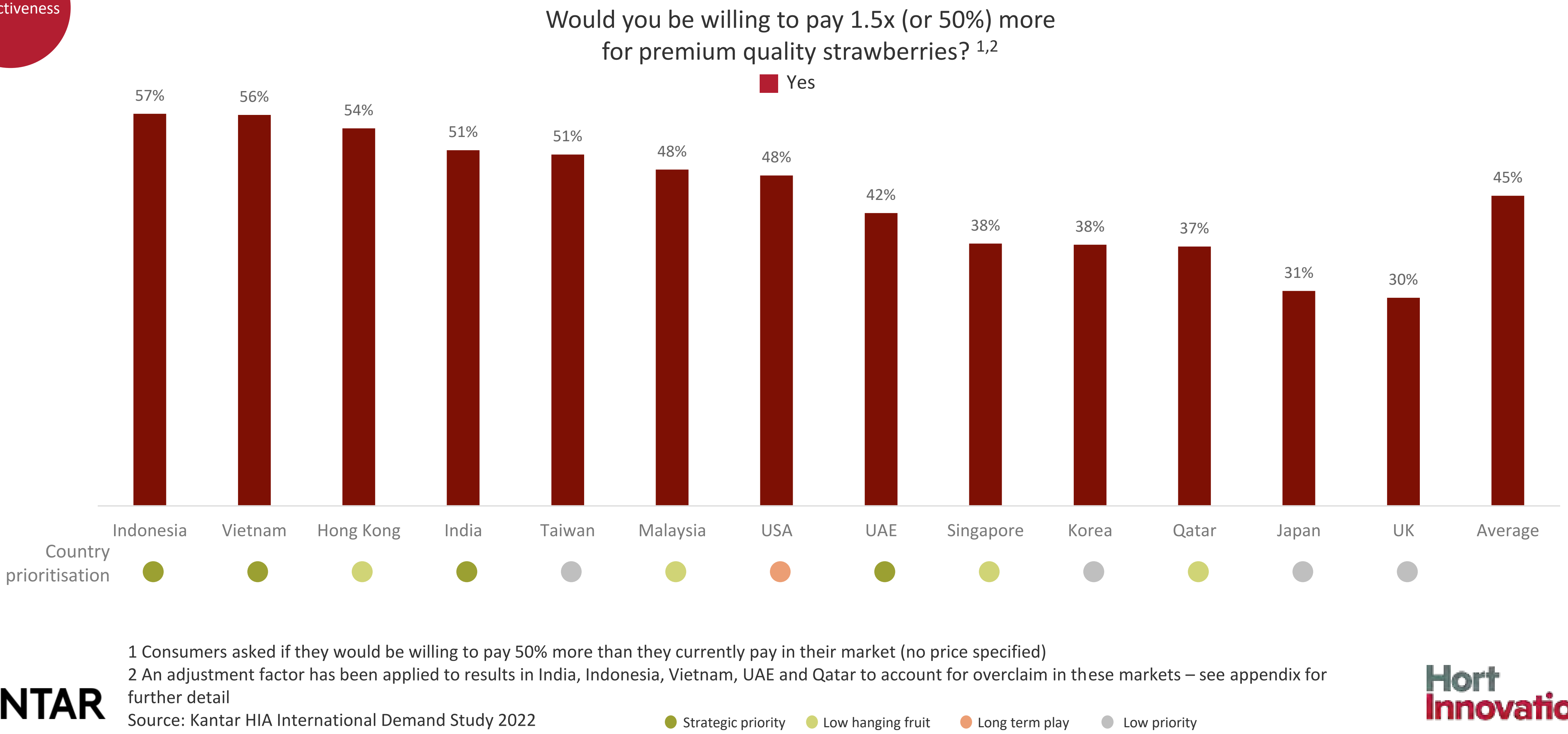
Source: Kantar HIA International Demand Study 2022

Strategic priority   Low hanging fruit   Long term play   Low priority

Consumers are most willing to pay 1.5x more in the Indonesian, Vietnamese and Hong Kong markets

Strawberry

Attractiveness



1 Consumers asked if they would be willing to pay 50% more than they currently pay in their market (no price specified)
2 An adjustment factor has been applied to results in India, Indonesia, Vietnam, UAE and Qatar to account for overclaim in these markets – see appendix for further detail
Source: Kantar HIA International Demand Study 2022

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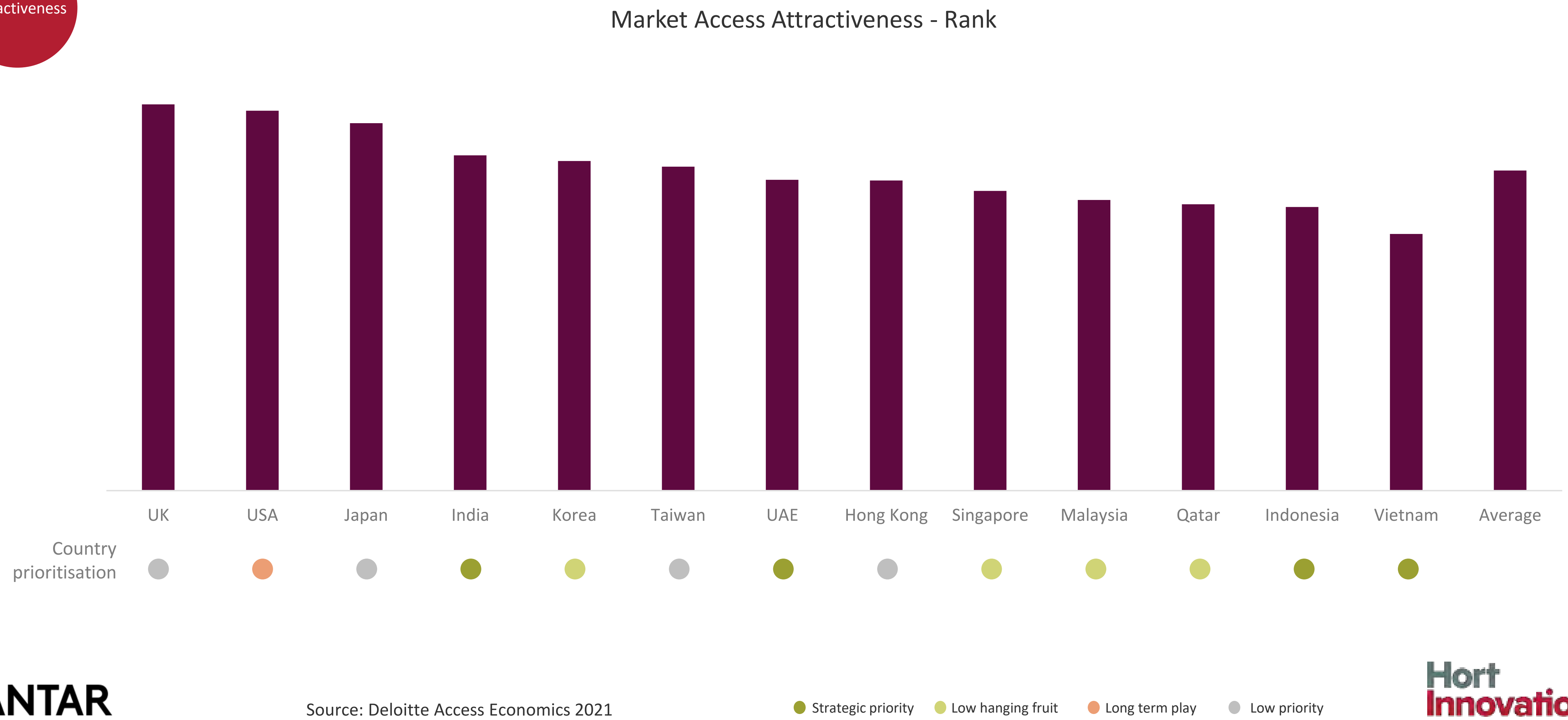
Although all markets are attractive, more affluent markets with larger populations rank more highly

Strawberry

Attractiveness

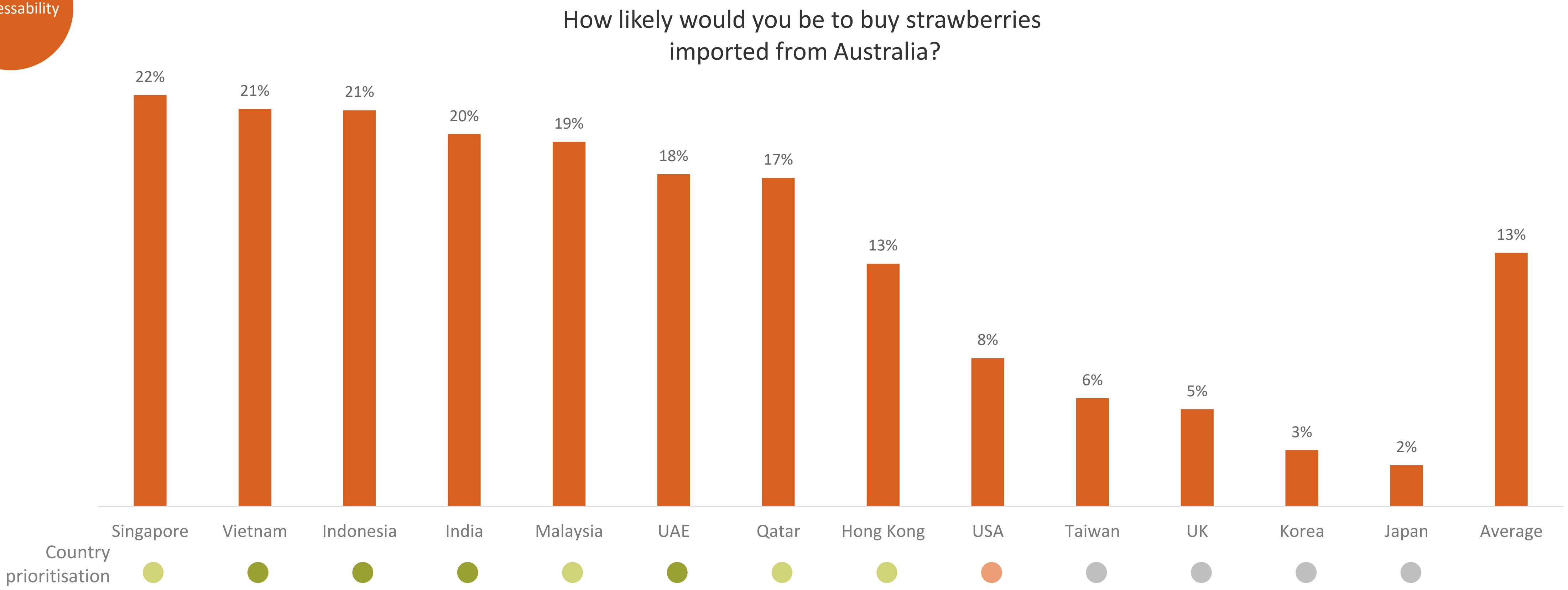


Source: Deloitte Access Economics 2021

Australian appeal is relatively high across all markets, particularly in Singapore, Vietnam, Indonesia and India

Strawberry

Addressability



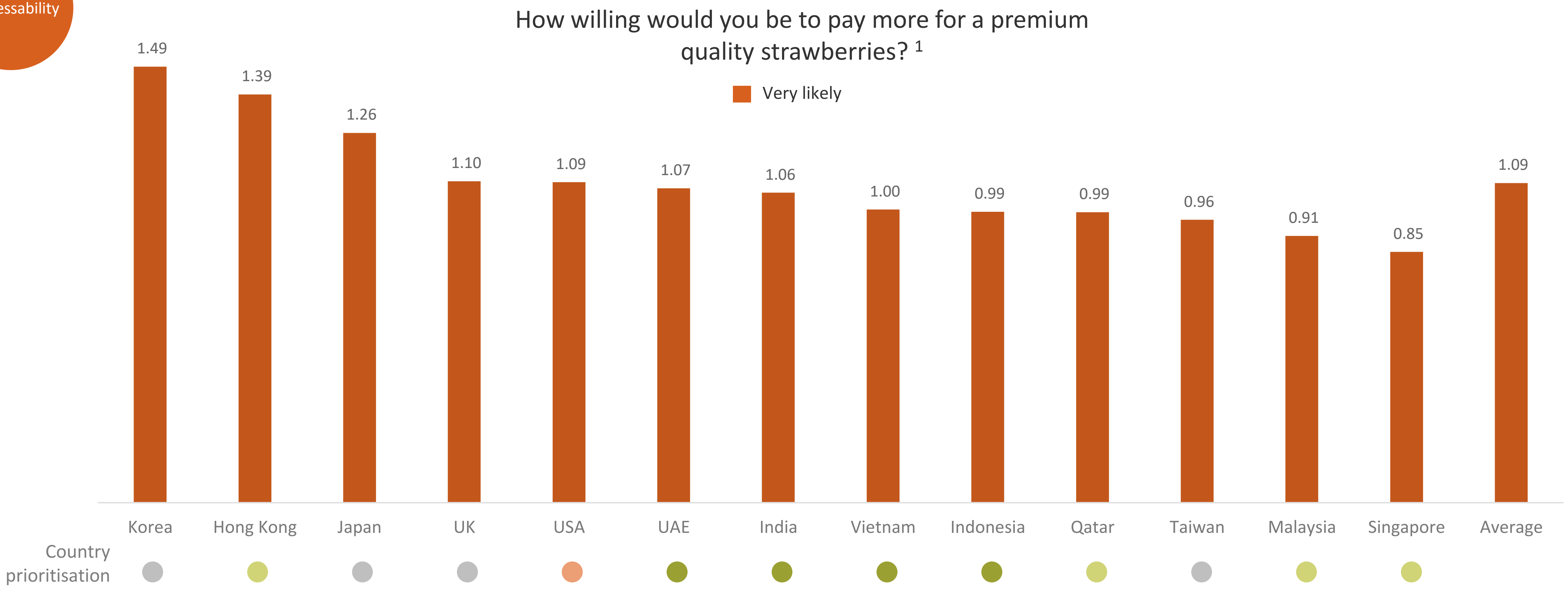
Source: Kantar HIA International Demand Study 2022

Strategic priority · Low hanging fruit · Long term play · Low priority

Relative to other commodities, consumers are more willing to pay more for premium strawberries in Korea, HK, Japan and the UK and USA

Strawberry

Addressability



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1 An index of the relative likelihood to pay more for strawberries vs other commodities within each market

Source: Kantar HIA International Demand Study 2022

Strategic priority · Low hanging fruit · Long term play · Low priority

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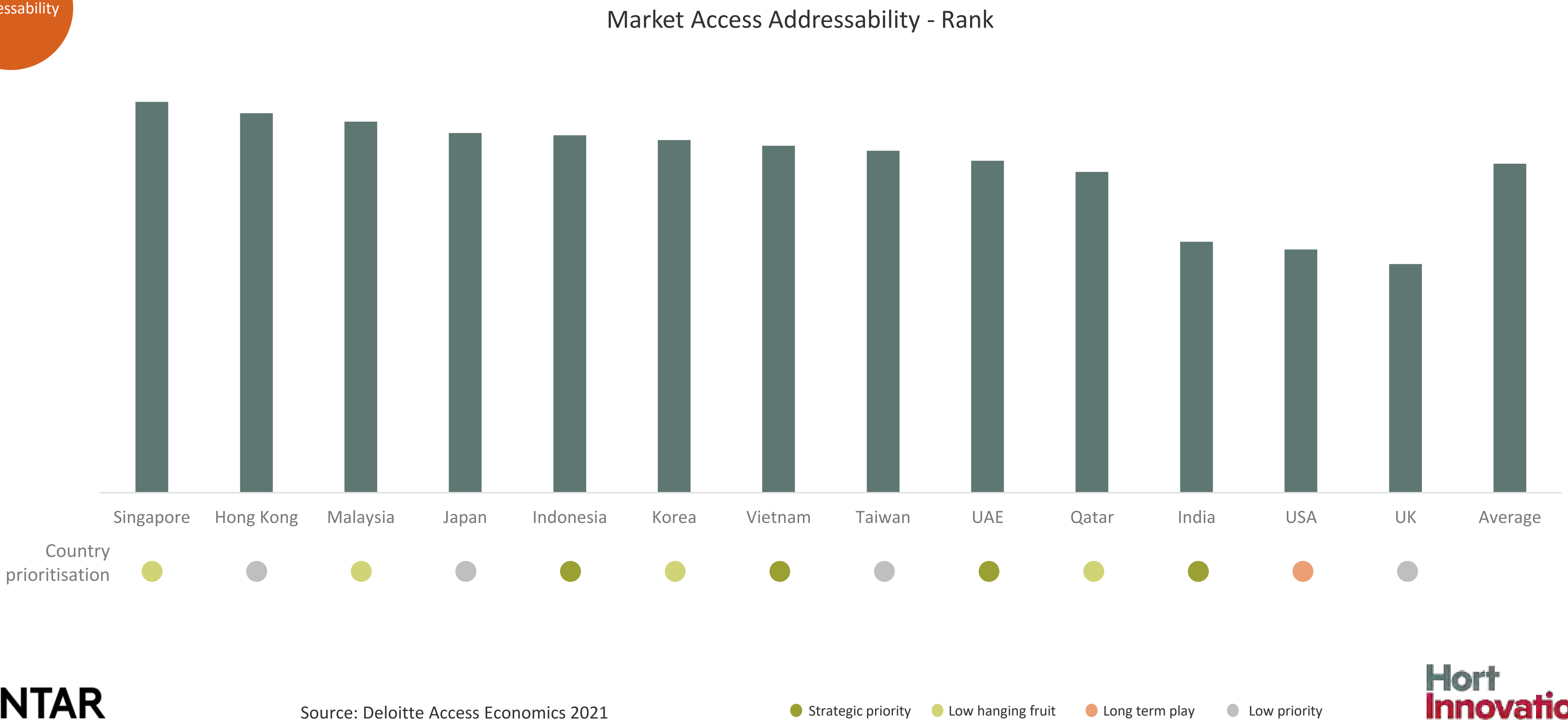
Some markets rank as more addressable due to the ease of trade, market risk and value chain competitiveness

Strawberry

Addressability



Source: Deloitte Access Economics 2021

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3.11 Strawberries

i. Market prioritisation

Leverage the strategic framework to prioritize markets based on consumer behaviour, perception and market access

ii. Commodity profiling

In-depth data profiling of how the commodity is consumed across markets, premium triggers and barriers

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Strawberry

The prioritisation revealed x4 markets ripe for Strawberry export.
The next section will deep dive into Strawberry consumption across markets.

	USA	UK	Singapore	India	Japan	Hong Kong	South Korea
Market priorities							
	Malaysia	UAE	Qatar	Taiwan	Vietnam	Indonesia	
Market priorities							

Strategic priority   Low hanging fruit   Long term play   Low priority

Strawberry consumption snapshot

Strawberry

	India	Vietnam	Indonesia	UAE
HOW OFTEN (P1W pen.)	31%	32%	36%	45%
WHEN	Breakfast Snack	Snack Lunch	Snack between Lunch/Dinner	Snack Lunch
HOW	Fresh on its own In a Smoothie / Frappe / Juice	Fresh on its own As part of a snack	Fresh on its own In a Smoothie / Frappe / Juice	Fresh on its own
WHY	Tasty Indulgence	Tasty Indulgence	Tasty Quick & Easy	Tasty Indulgence
WHERE	At home	At home	At home	At home
WHO WITH	With Family	With Family	With Family	With Family

Source: Kantar HIA International Demand Study 2022

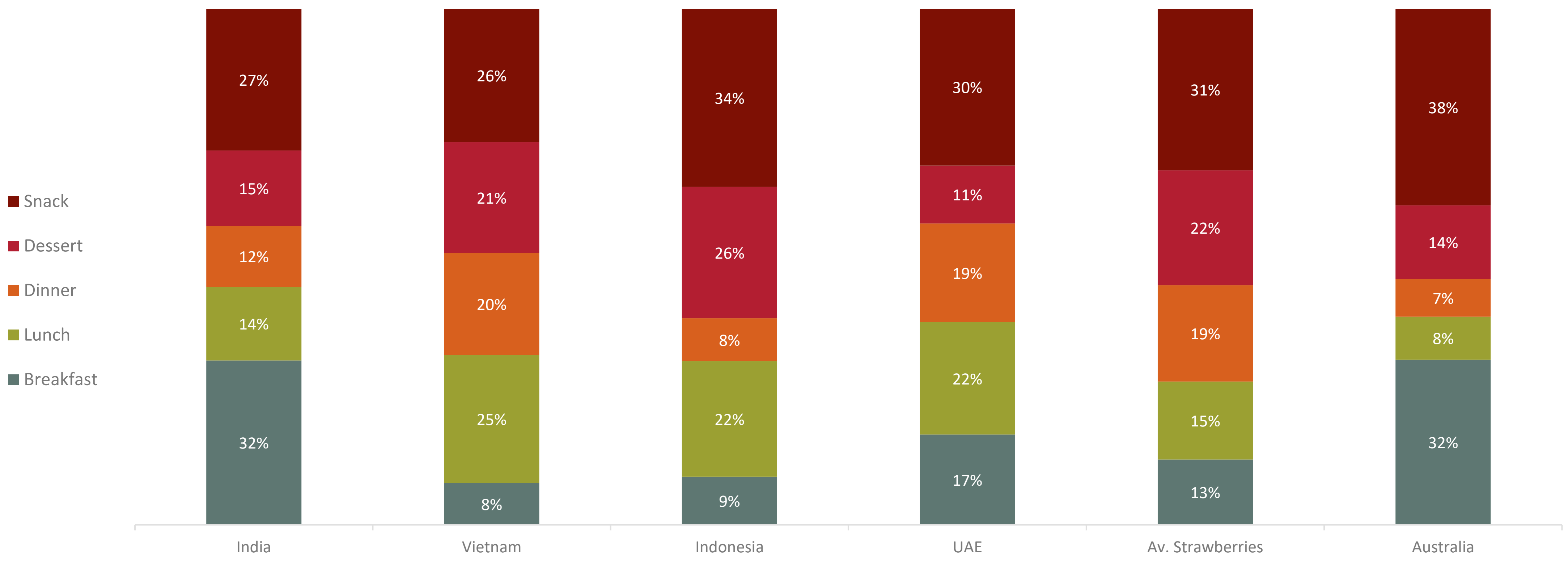
Strawberry: Strategic Imperatives

	India	Vietnam	Indonesia	UAE
CONSUMER PREFERENCES	As a tasty and indulgent breakfast or snack, fresh on its own or in a smoothie/frappe/juice, at home with family	As a tasty and indulgent snack or lunch, fresh on its own or as part of a snack, at home with family	As a tasty, quick and easy snack between lunch/dinner, fresh on its own or in a smoothie/frappe/juice, at home with family	As a tasty and indulgent snack or lunch, fresh on its own, at home with family
NEEDS TO SATISFY	Tasty Indulgence	Tasty Indulgence	Tasty Quick & Easy	Tasty Indulgence
FUNCTIONAL ATTRIBUTES	Refreshing Taste Sweet	Refreshing taste Rich in anti-oxidants	Fresh & Light Refreshing taste Sweet	Sweet Refreshing taste
PREMIUM OPPORTUNITY	Fresher I trust its safety	Fresher Sweeter	Fresher Free from pesticides High in vitamins and minerals	Fresher Sweeter
BARRIERS TO OVERCOME	Too expensive	Bruises Easily Too expensive	Poor Quality Too expensive	Too expensive Poor Quality
KEY SUBSTITUTES	Apple Bananas	Apple Table Grapes	Apple Mango Bananas	Apple Bananas

Strawberries are consumed as a snack across priority markets as well as at lunch in Vietnam, Indonesia and UAE and Breakfast for India

Strawberry

When did you consume?



Note: Australian data for "Berries" overall

Source: Kantar HIA International Demand Study 2023

	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
N=	293	300	296	295	300	300	299	224	296	298	290	303	41

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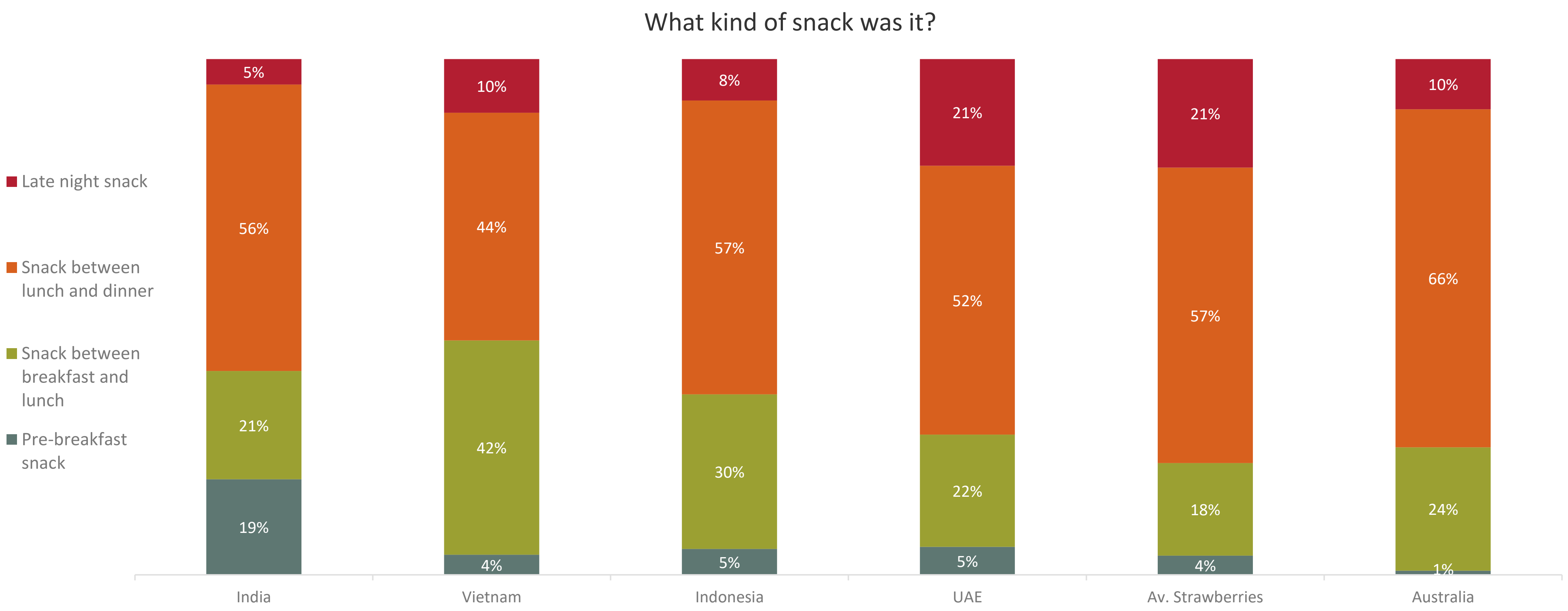
When consumed as a snack, Strawberries are typically consumed between lunch and dinner across priority markets though they are also consumed before lunch

Strawberry



Note: Australian data for "Berries" overall
Source: Kantar HIA International Demand Study 2023

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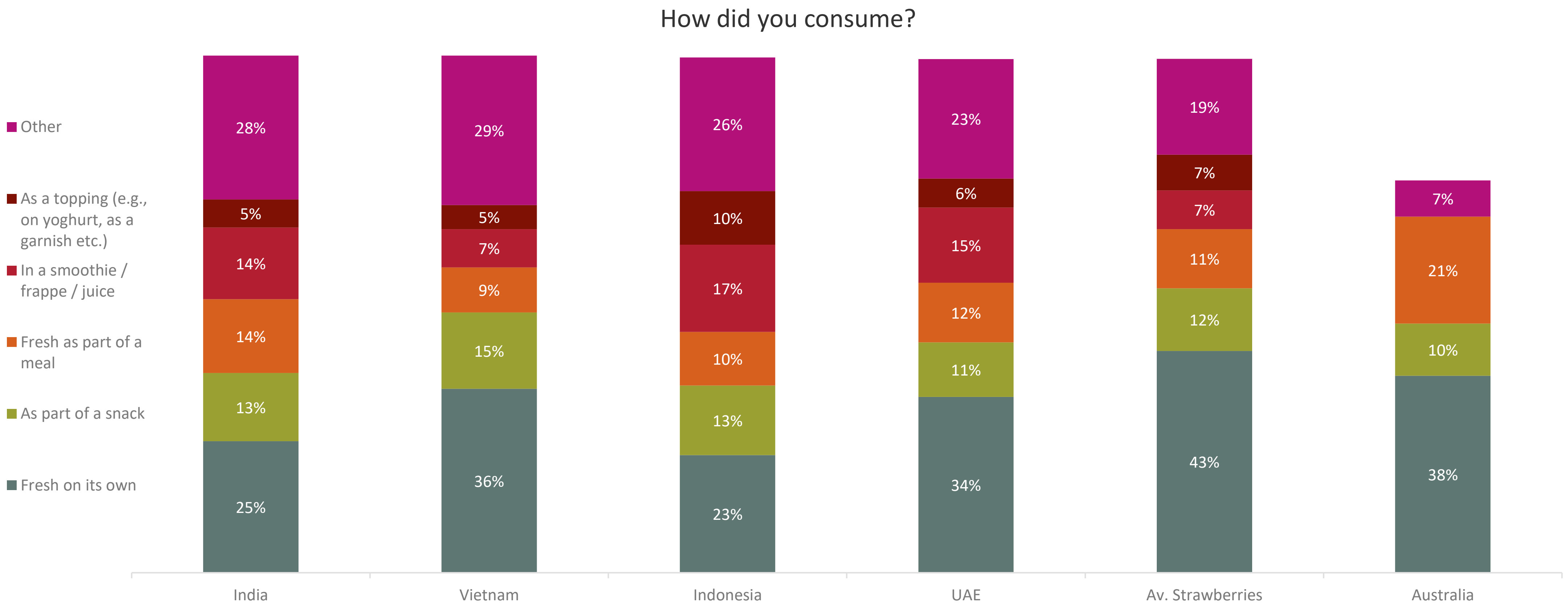
Strawberries are typically consumed fresh on their own, as part of a snack or in a smoothie across priority markets

Strawberry



Note: Australian data for "Berries" overall

'Other' = In a salad, As an ingredient in baking, Cooked on its own, As an ingredient in cooking, For decoration / show only, To make baby food / puree, As part of an alcoholic drink e.g. cocktail And Don't know

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	296	295	300	300	299	224	296	298	290	303	41

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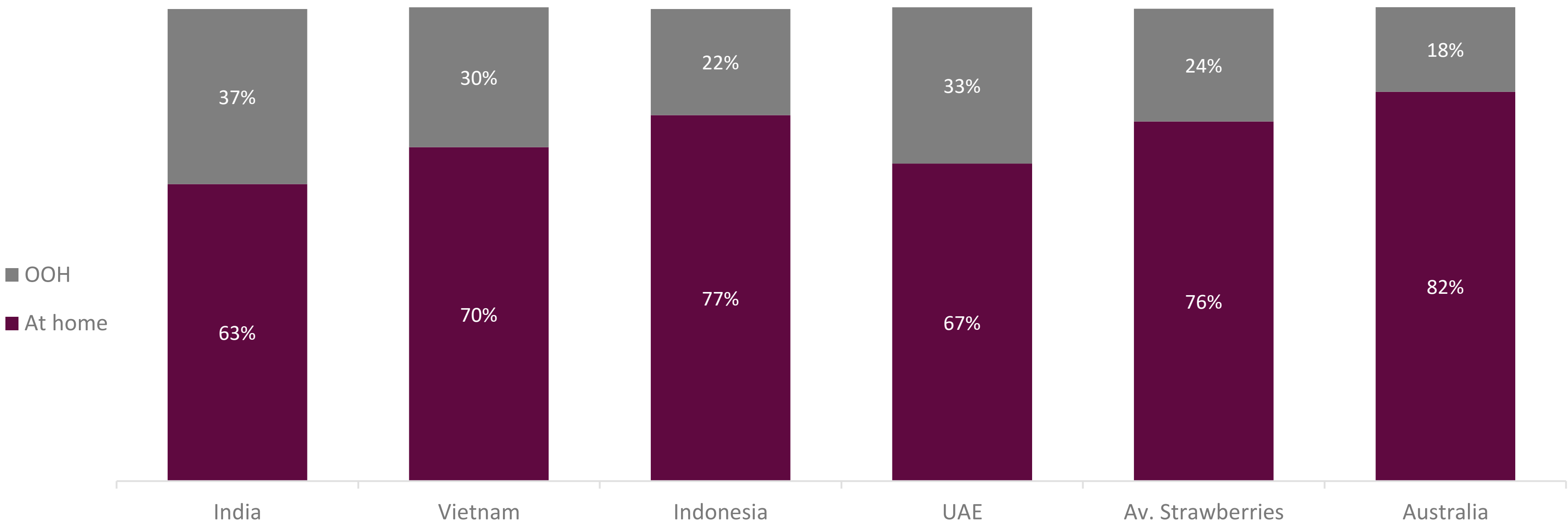
Most people consume Strawberries at home. India and UAE skew more out of home

Strawberry

Where were you?

76%

of consumption of strawberries is in the home, this varies only slightly by market



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	293	300	296	295	300	300	299	224	296	298	290	303	41

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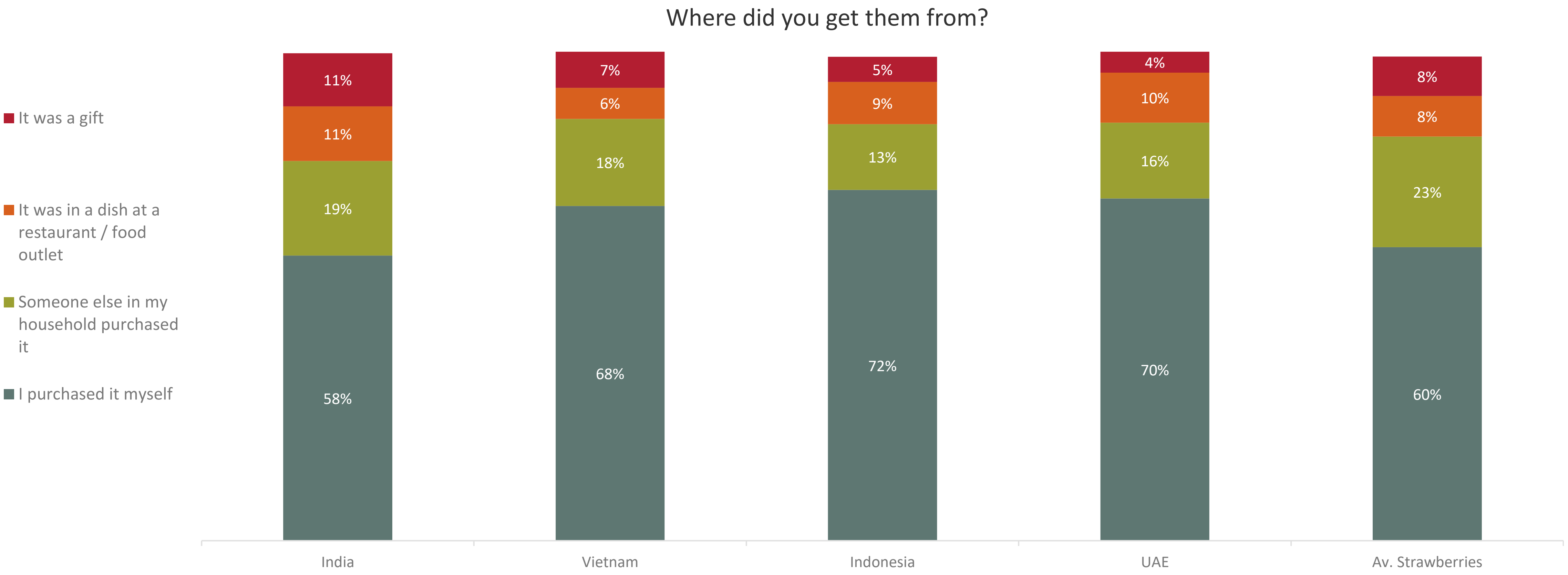
Most people purchase Strawberries themselves

Strawberry



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Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	296	295	300	300	299	224	296	298	290	303	41

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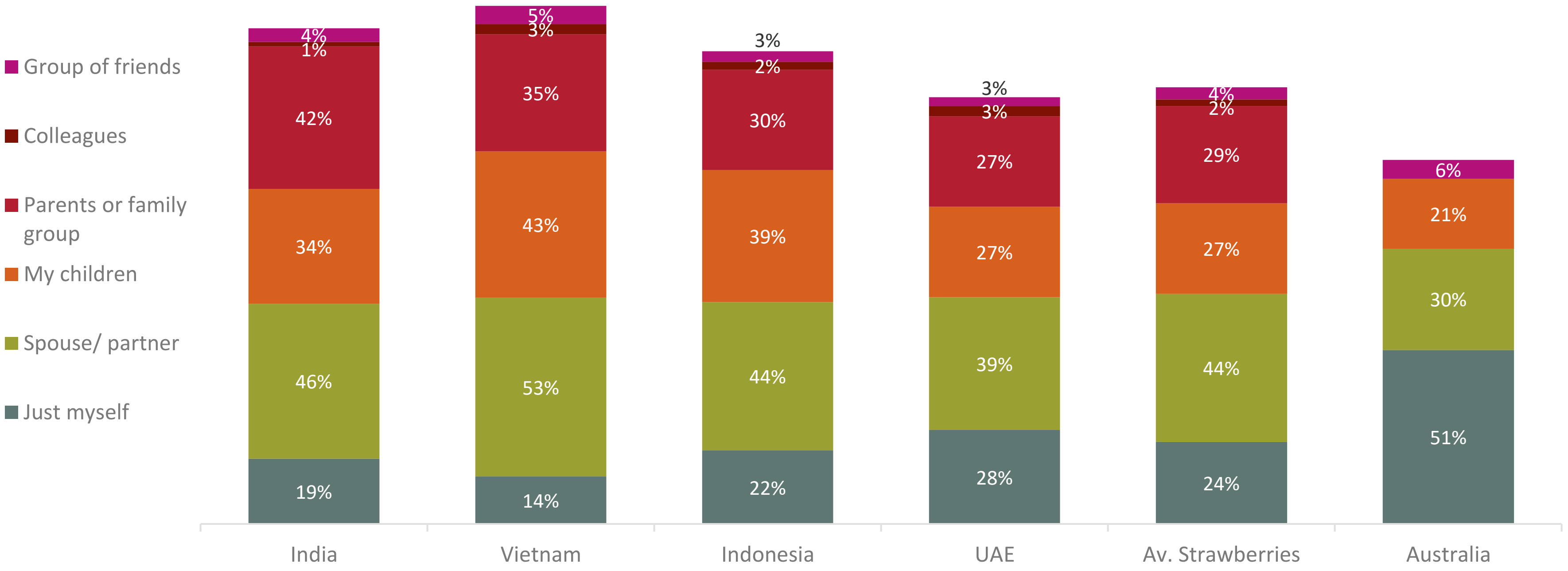
Strawberries are typically consumed with a spouse or partner or with a broader family group

Who were you with?

44%

of consumption of strawberries (on average) is with a spouse/partner.



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	293	300	296	295	300	300	299	224	296	298	290	303	41

There is a range of reasons why people choose to eat different fruits & vegetables. There are
6 universal consumer needs pillars that drive this choice for consumers globally

The 6 needs pillars are universal across commodities and global markets

Tasty

All about: Taste, Refreshment, and Enjoyment

Quick & Easy

All about: Convenience Simplicity, and Ease

Healthy & Nutritious

All about: Guilt-free, Nourishing and Sensible

Indulgence

All about: Comfort, Relaxation and Self Care

Physical & Mental Energy

All about: Energy, Uplift, and Reinvigoration

Connection

All about: Bonding, Celebration and Creating Memories

In priority markets, the most important reasons why people choose to consume Strawberries are for something tasty, indulgent and quick & easy

59%

of people in priority markets consume Strawberries for something

Tasty

47%

of people in priority markets consume Strawberries for an

Indulgence

46%

of people in priority markets consume Strawberries for something

Quick & Easy

Strawberry

Taste is the most important consumption driver across all markets, followed by Indulgence or Quick & Easy in Indonesia

Which were important when choosing to consume?

	India	Vietnam	Indonesia	UAE	Av	Aus
Tasty	59%	54%	66%	55%	63%	71%
Quick & Easy	44%	42%	52%	44%	43%	63%
Healthy & Nutritious	36%	41%	43%	37%	29%	42%
Indulgence	47%	51%	42%	46%	40%	26%
Physical & Mental Energy	35%	30%	25%	27%	20%	27%
Connection	43%	42%	41%	36%	30%	17%

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Note: Australian data for “Berries” overall

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
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When we investigate in more detail, ‘really tasty’ is a key driver in Vietnam and UAE and ‘refreshing’ in India, Indonesia and UAE

Strawberry

Which were important when choosing to consume?

	India	Vietnam	Indonesia	UAE	Av	Aus
Really tasty	28%	33%	28%	32%	39%	53%
Refreshing	35%	21%	47%	30%	27%	33%
Quick and easy	24%	20%	31%	22%	25%	42%
To satisfy a craving	21%	18%	16%	25%	18%	11%
Everyone would eat	16%	17%	15%	14%	17%	14%
Good for sharing	16%	20%	19%	18%	15%	6%
Has the nutrition my mind / body needs	14%	17%	22%	18%	15%	24%
To treat / indulge myself or others	14%	15%	10%	14%	13%	12%
To cheer me up	13%	13%	14%	19%	11%	NA
That does not require much thought	9%	12%	10%	8%	11%	17%

Note: Australian data for “Berries” overall

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	296	295	300	300	299	224	296	298	290	303	41

More functionally, consumers are looking for Strawberries that are have a sweet taste while still being light and refreshing

28%

of people in priority markets are looking for Strawberries that have

Refreshing taste

25%

of people in priority markets are looking for Strawberries that are

Fresh / Light

24%

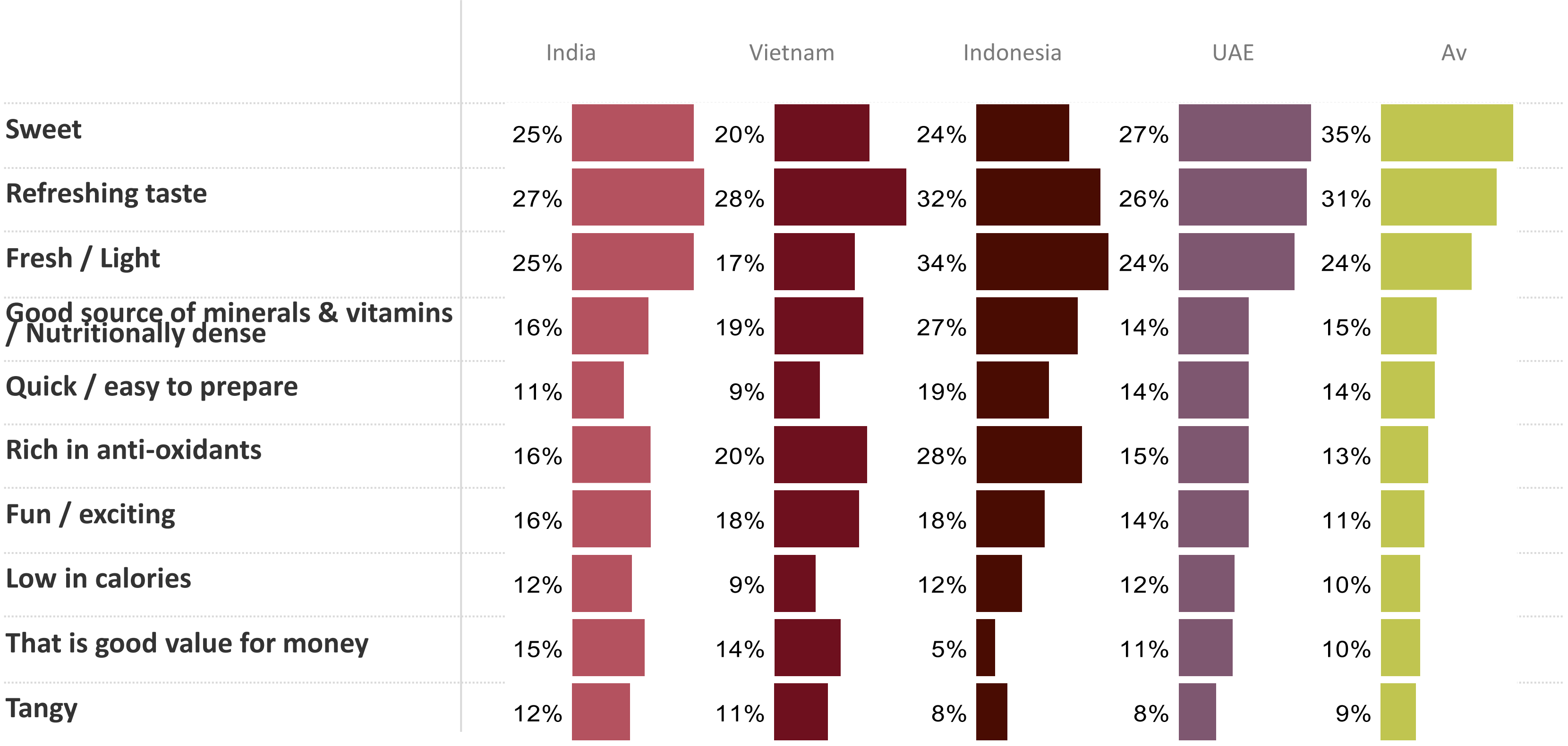
of people in priority markets are looking for Strawberries that are

Sweet

Across priority markets consumers are looking for Strawberries to be refreshing but sweet. In India, Indonesia and UAE they are also looking for fresh and light

Strawberry

What were you looking for when you consumed?



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	293	300	296	295	300	300	299	224	296	298	290	303	41

When it comes to the premium opportunity, consumers are looking for Strawberries that are fresher, sweeter, free of pesticides which makes them safe & trusted

43%

of people in priority markets are looking for premium Strawberries that are

Fresher

30%

of people in priority markets are looking for premium Strawberries that are

Sweeter

29%

of people in priority markets are looking for premium Strawberries that are

Free from pesticides

27%

of people in priority markets are looking for premium Strawberries that are

Safe & Trusted

Source: <sources here; divided by a semi-colon; all on one line>

Premium quality Strawberries are characterised by freshness across priority markets along with safe, free from pesticides and higher nutrition

Strawberry

What does premium quality mean to you?

	India	Vietnam	Indonesia	UAE	Av
Fresher	43%	42%	46%	42%	40%
Sweeter	27%	32%	33%	28%	34%
Right state of ripeness	25%	29%	28%	22%	23%
More flavour	25%	22%	24%	19%	22%
Organic / free from pesticides	30%	26%	36%	24%	21%
More appetizing (e.g. not bruised, damaged)	18%	29%	20%	16%	19%
Higher in vitamins and minerals	27%	24%	36%	22%	19%
I trust its safety	33%	22%	27%	26%	17%
Larger than normal	14%	19%	28%	15%	17%
Locally grown / produced in my area	21%	12%	13%	15%	16%

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	296	295	300	300	299	224	296	298	290	303	41

Price is the biggest barrier to overcome with strawberry consumption, followed by bruising easily and poor quality.

Other fruits are considered worthy substitutes

Barriers to Consumption

Price	Bruise Easily	Poor Quality
26% (priority market average)	21% (priority market average)	19% (priority market average)

Leading Substitutes

Apples	Banana	Mango
37% (priority market average)	33% (priority market average)	29% (priority market average)

Strawberry

Price is a key barrier across priority markets. In Vietnam, bruises easily is important along with poor quality in Indonesia and UAE

What are the reasons you may not choose?

	India	Vietnam	Indonesia	UAE	Av
It is too expensive	28%	28%	23%	26%	38%
It bruises easily	16%	34%	15%	18%	17%
It goes off too quickly / it does not last	13%	20%	18%	13%	16%
Quality is often poor	15%	16%	26%	19%	15%
There are more exciting alternatives	18%	15%	21%	12%	12%
They are never in the right state of ripeness when sold in shops	12%	6%	9%	12%	10%
It will not fill me up	15%	13%	11%	11%	8%
Not enough people in my household like it/them	14%	13%	13%	11%	8%
The quantity is more than I typically need	12%	10%	9%	11%	6%
Too much packaging	15%	11%	9%	8%	6%

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Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	296	295	300	300	299	224	296	298	290	303	41

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Apples, Bananas and Mangos are key substitutes in priority markets along with Melons in Indonesia and Table Grapes in Vietnam and UAE

Strawberry

What else would you typically consider having instead?

	India	Vietnam	Indonesia	UAE	Av
Apple	40%	33%	41%	32%	31%
Bananas	38%	23%	37%	32%	28%
Mango	31%	23%	38%	23%	20%
Blueberries	22%	14%	13%	18%	17%
Melon	19%	13%	31%	17%	16%
Table Grapes	0%	26%	12%	23%	15%
Kiwifruit	21%	12%	13%	14%	15%
Cherries	23%	10%	10%	18%	15%
Pineapple	23%	14%	12%	17%	14%
Citrus Fruits	16%	10%	18%	14%	14%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	296	295	300	300	299	224	296	298	290	303	41

Hort Innovation

Recommendation: How to drive growth in Australian Strawberries

Strawberry

1. Focus on Strategic Priority Markets

Focus on markets where category **penetration is high** and consumers are **willing to pay a premium** for quality Strawberries (ie. **Indonesia, Vietnam, UAE, and India**). **Improve knowledge and appeal for Australian Strawberries in all priority markets** to drive incremental growth in Australian Strawberry exports.

2. Deliver Core Consumer Needs

Deliver the core consumer needs across priority markets with Strawberries that have a **refreshing taste, and are an indulgence that is good for sharing**. Ensure Strawberries are at or above par for being **sweet, fresh and light, and rich in anti-oxidants, that are served as a breakfast, lunch, snack or dessert.**

3. Leverage Premium Advantage

Maximise the premium opportunity by delivering Strawberries that are fresher, higher in vitamins and minerals, sweeter, free of pesticides, and come from a safe and trusted source.

4. Reduce Consumption Barriers

Address perceptions that Strawberries are **too expensive, bruise easily, and are poor quality,** to minimise consumer drift to close substitutes like Apples, Bananas and Mangoes**.**

'Where to Play'

'How to Win'

KANTAR

3.12 Summerfruits

i. Market prioritisation
Leverage the strategic framework to prioritize markets based on consumer behaviour, perception and market access

ii. Commodity profiling
In-depth data profiling of how the commodity is consumed across markets, premium triggers and barriers

Hort Innovation

4 key considerations when interpreting the outputs of the Market Prioritisation

1. No Existing Technical Market Access

2. Markets with Existing Trade

3. Premium Opportunities

4. Focus of Investment

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Existing technical market access for a commodity was **intentionally NOT included** in the evaluation of addressability

Rationale:

- This project was designed to identify attractive and addressable **future** growth geographies therefore the analysis was not restricted by current arrangements
- This research is intended to **support and inform industry** decisions regarding the progress of any potential future or ongoing market access or market improvement request

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While the addressability calculation includes data on general market access and trade, it intentionally does not include whether Australia currently trades in a particular commodity

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    - However, we recommend re-evaluating the relative focus of investment in this market, and consider other markets when looking for **future** growth opportunities

3. Premium Opportunity

In evaluating attractive and addressable export markets, we have intentionally used data that shows where premium opportunities can be found

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- The overall objective of this project was to identify **profitable** growth opportunities for commodities in the future, and Australian commodities will have more chance of growing profitably where they have a better chance for commanding a price premium
  - High commodity penetration in a market has also been used to evaluate attractiveness, but this analysis favours markets where there is a larger opportunity for Australian products to command a **premium**.

4. Focus of Investment

The evaluation and prioritisation of export markets into the 4 quadrants of attractiveness and addressability **is intended to be only one input into decision making** about **where to focus investment**

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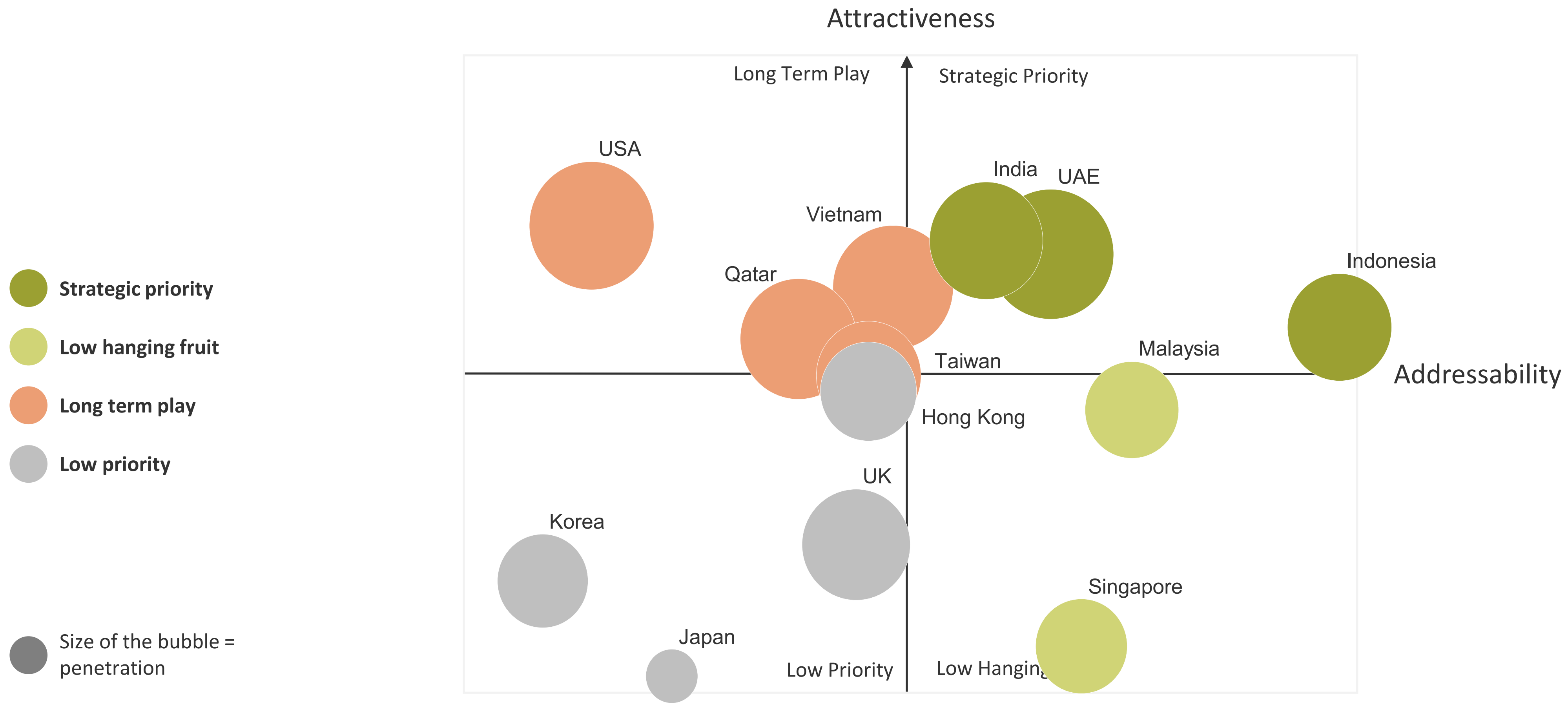
- The objective of this project was primarily to offer a consumer lens into commodity consumption, to enable export decisions to be informed by more robust consumer data (while still included additional market factor data from previous Deloitte analysis)
  - Export decisions should be made using all available information including the economics of local growers and exporters and this report forms one input into that decision process

We have identified 3 strategic priority markets that represent the most attractive and appealing export opportunity for Australian summerfruits, based on consumer preference and behaviour

Summer Fruit



Source: Kantar HIA International Demand Study 2022, World Bank 2021

Summerfruit: Strategic priorities

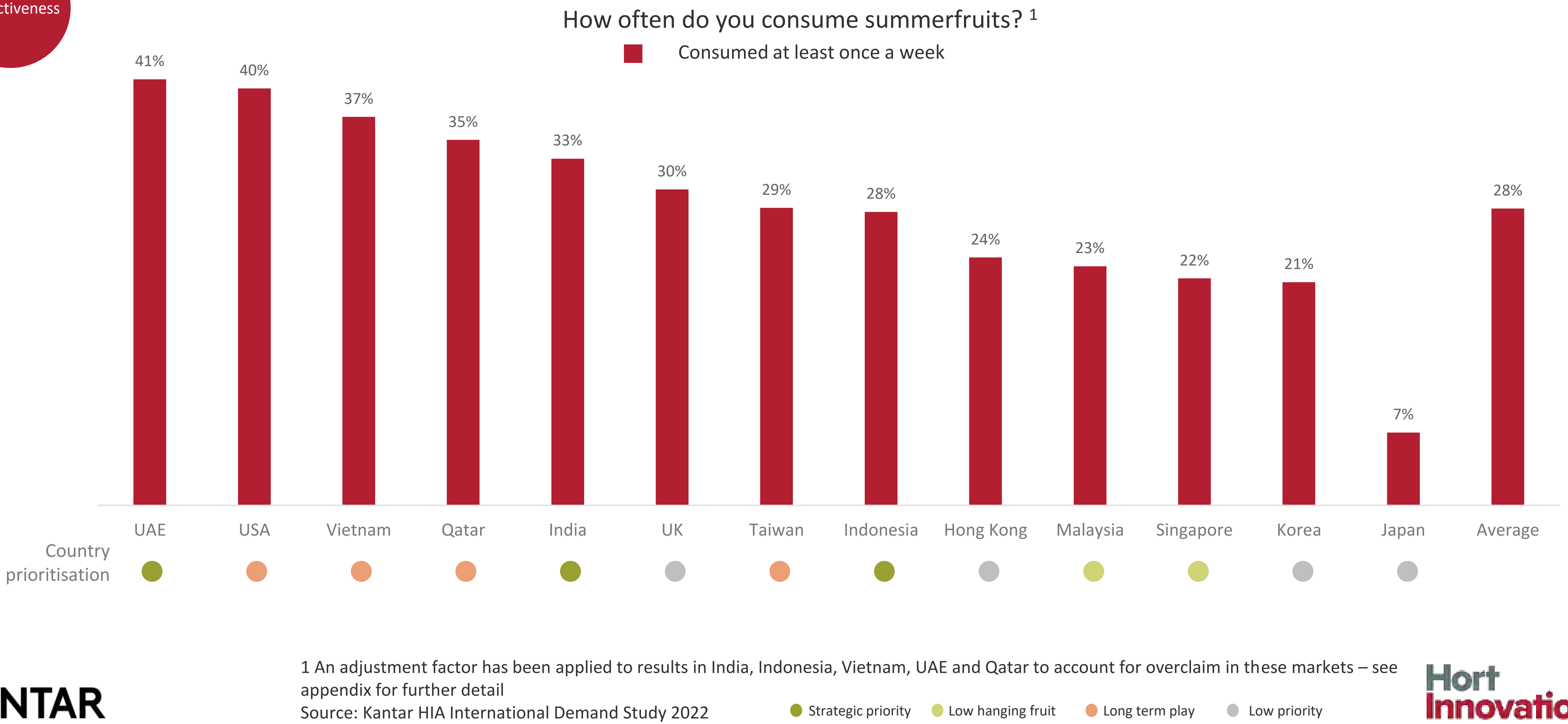
Summer Fruit

	India	Indonesia	UAE
STRATEGIC IMPLICATIONS	Despite the low income per capita, India represents a strong export opportunity for Summerfruits given the sizable population and high willingness to pay and Australian appeal	Indonesia has a low income per capita, but sizeable population and strong potential for Australian/ premium quality product with a high claimed willingness to pay	With a high per capita income and strong category penetration the UAE presents a strong opportunity for Summerfruits
ATTRACTIVENESS	• Moderate category penetration (33%) • High claimed willingness to pay 1.5x more	• Moderate category penetration (28%) • Highest claimed willingness to pay 1.5x more	• Highest category penetration amongst the markets (41%) • Moderate claimed willingness to pay 1.5x more
ADDRESSABILITY	• Strong Australian appeal relative to other markets • Moderate ability to command a premium over other commodities in market	• Strongest Australian appeal • Moderate ability to command a premium over other commodities in market	• Moderate Australian appeal • Moderate ability to command a premium over other commodities in market

Penetration of Summerfruits is high across all markets, with the exception of Japan

Summer Fruit

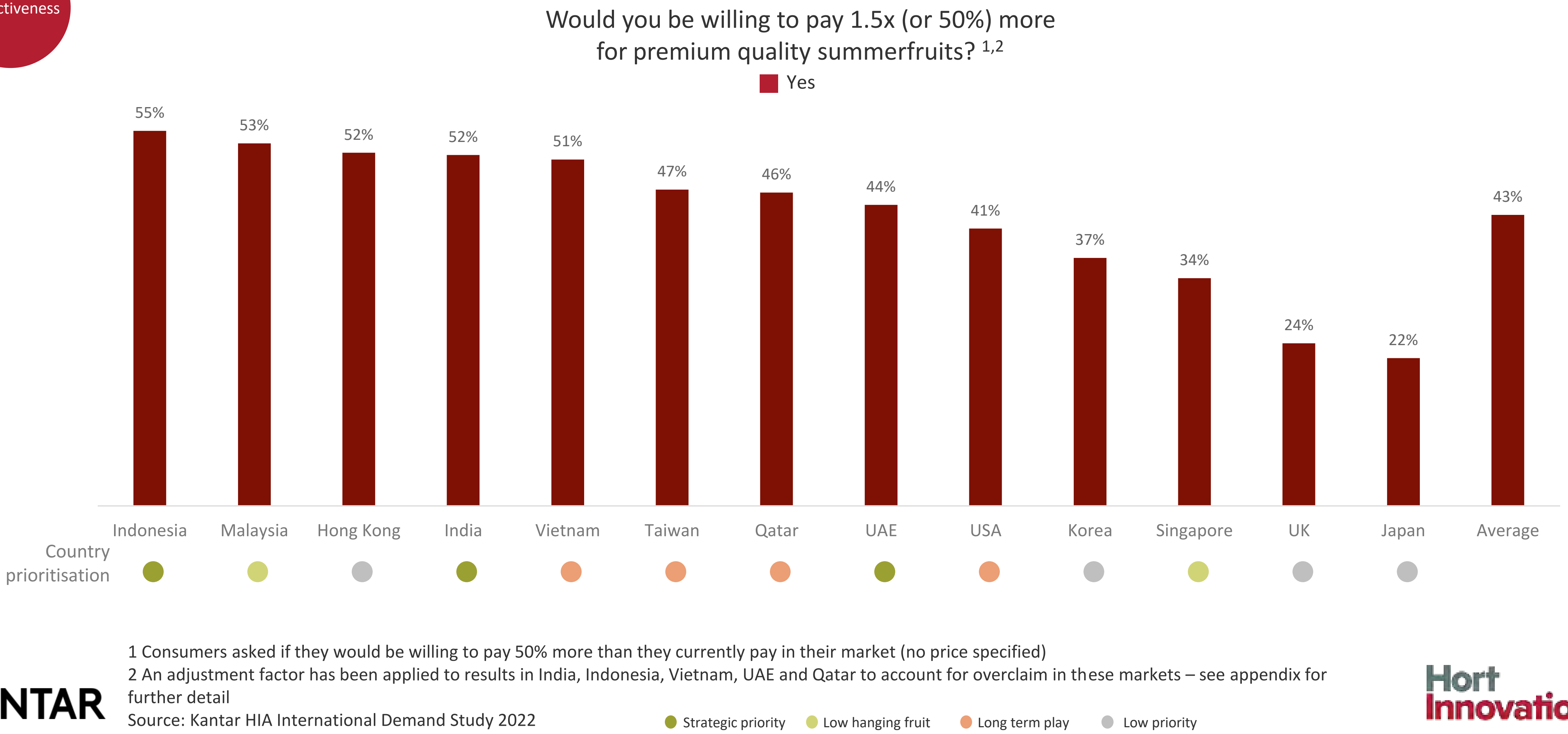
Attractiveness



1 An adjustment factor has been applied to results in India, Indonesia, Vietnam, UAE and Qatar to account for overclaim in these markets – see appendix for further detail
Source: Kantar HIA International Demand Study 2022

There is a strong claimed willingness to pay 1.5x, most notably in Indonesia, Malaysia, HK, India and Vietnam

Attractiveness



1 Consumers asked if they would be willing to pay 50% more than they currently pay in their market (no price specified)

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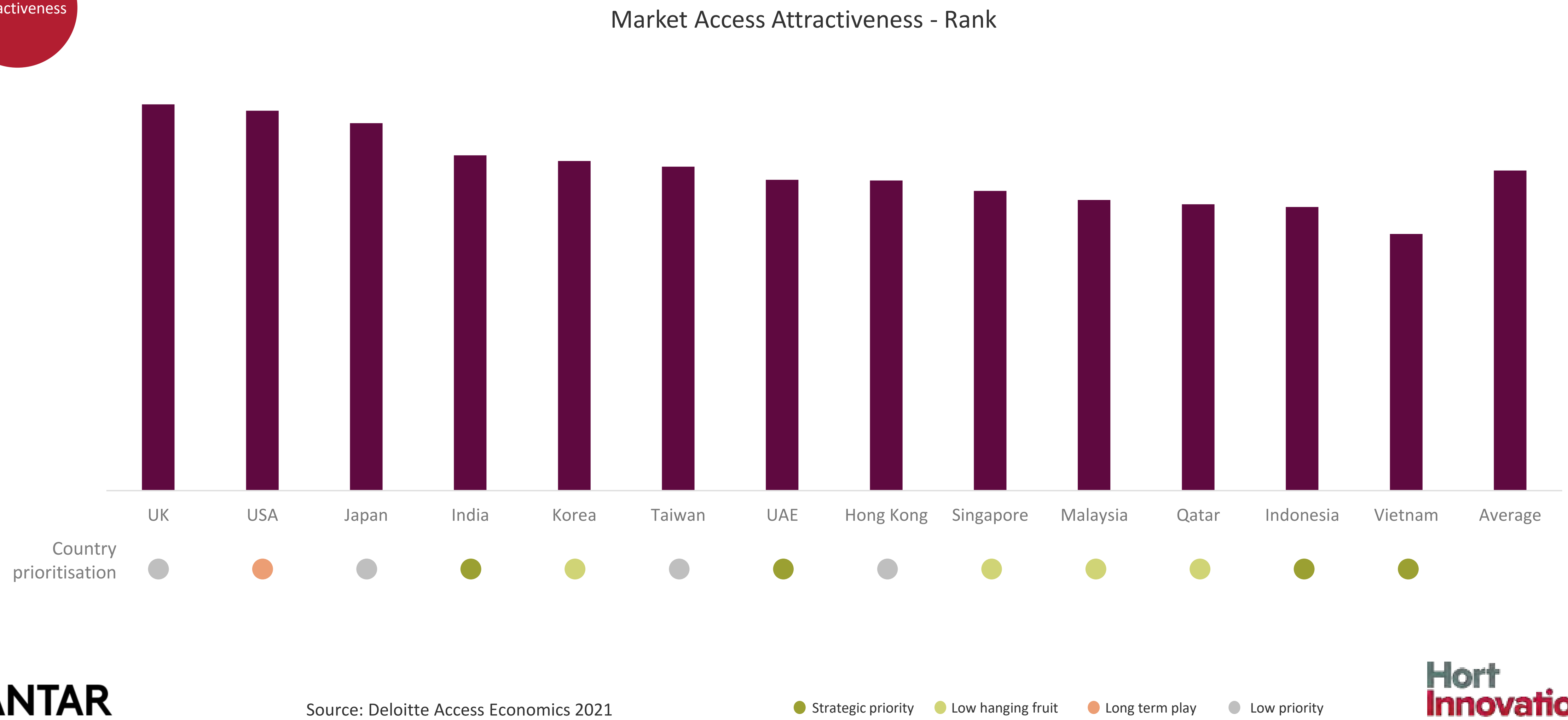
Source: Kantar HIA International Demand Study 2022

Although all markets are attractive, more affluent markets with larger populations rank more highly

Summer Fruit

Attractiveness



Source: Deloitte Access Economics 2021

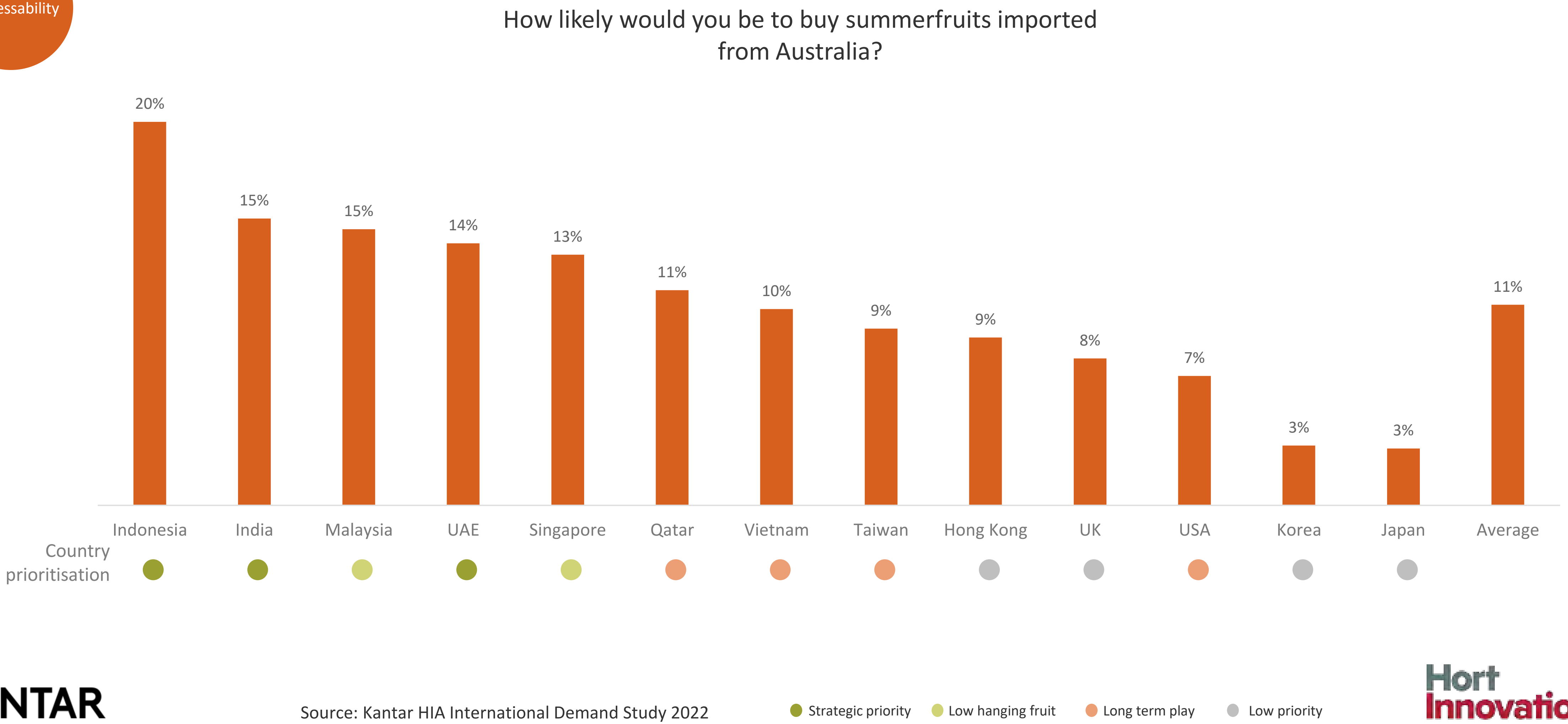
KANTAR

Hort Innovation

Australian appeal of Summerfruits is strongest in Indonesia followed by India, Malaysia, and the UAE

Summer Fruit

Addressability



KANTAR

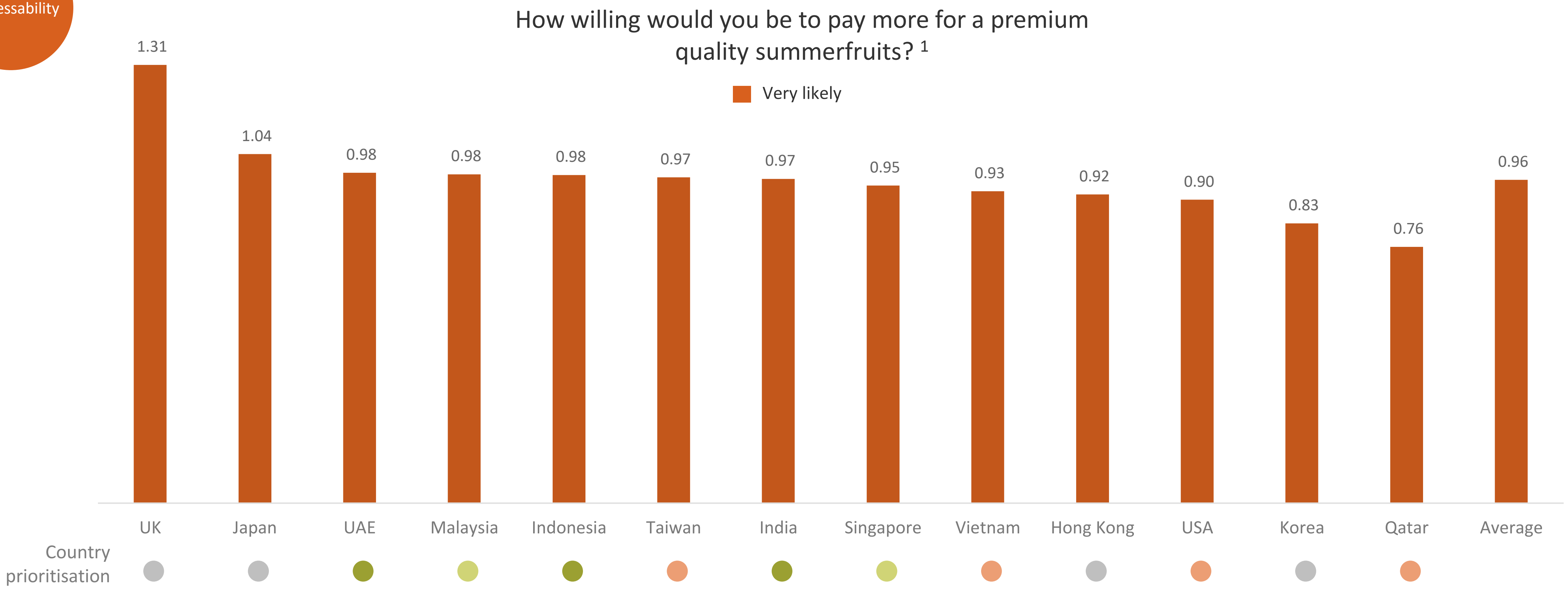
Source: Kantar HIA International Demand Study 2022

Hort Innovation

Summerfruits have a great ability to command a premium over commodities in the UK and Japan and less so in other markets

Summer Fruit

Addressability



KANTAR 1 An index of the relative likelihood to pay more for summerfruits vs other commodities within each market
Source: Kantar HIA International Demand Study 2022

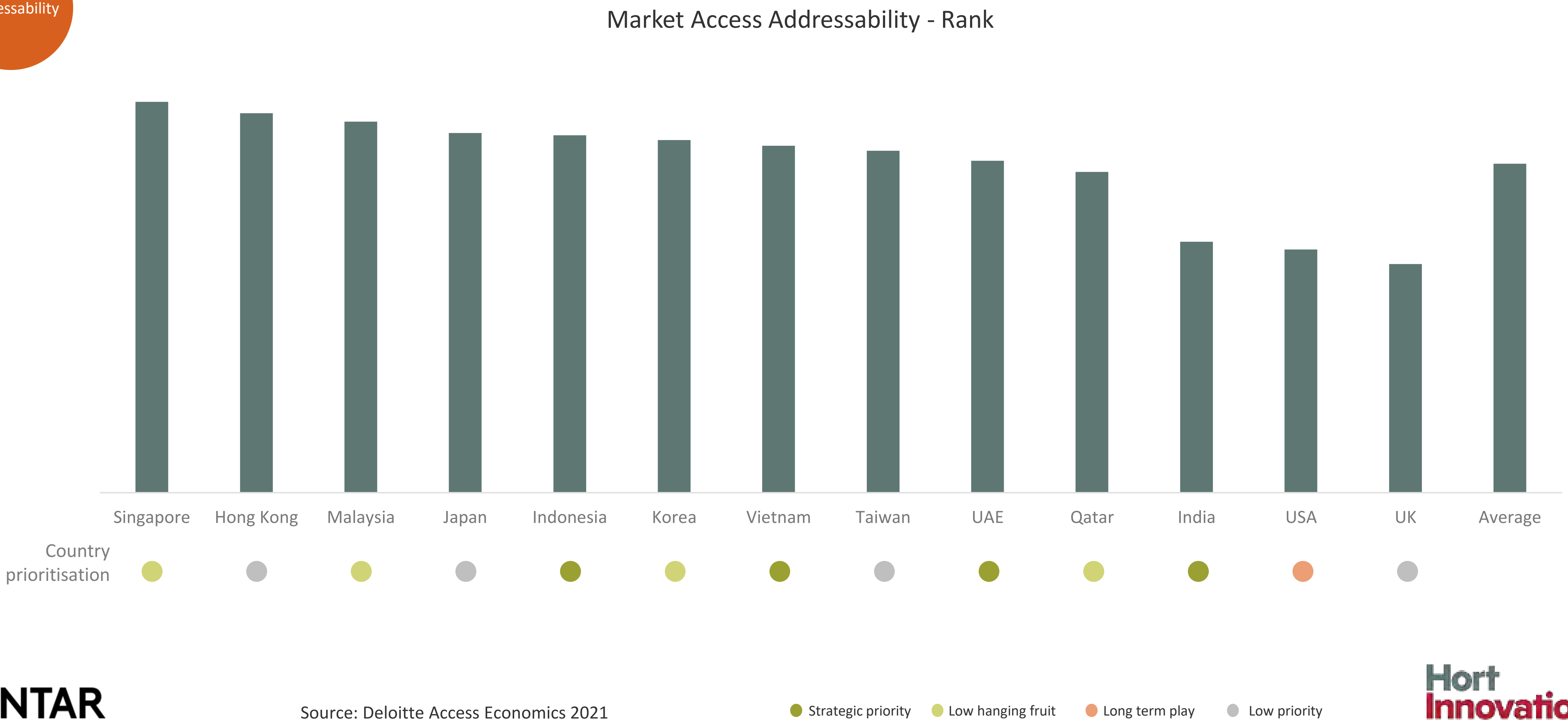
Strategic priority Low hanging fruit Long term play Low priority

Hort Innovation

Some markets rank as more addressable due to the ease of trade, market risk and value chain competitiveness

Summer Fruit

Addressability



Source: Deloitte Access Economics 2021

3.12
Summerfruits

i. Market prioritisation
Leverage the strategic framework to prioritize markets based on consumer behaviour, perception and market access

ii. Commodity profiling
In-depth data profiling of how the commodity is consumed across markets, premium triggers and barriers

The prioritisation revealed x3 markets ripe for Summerfruits export. The next section will deep dive into Summerfruits consumption across markets.

Summer Fruit

USA | UK | Singapore | India | Japan | Hong Kong | South Korea

Market priorities

Malaysia | UAE | Qatar | Taiwan | Vietnam | Indonesia

Market priorities

Strategic priority · Low hanging fruit · Long term play · Low priority

Summerfruit consumption snapshot

Summer Fruit

	India	Indonesia	UAE
HOW OFTEN (P1W pen.)	33%	28%	41%
WHEN	Breakfast Snack	Lunch Snack	Snack Lunch
HOW	Fresh on its own	Fresh on its own As part of a snack	Fresh on its own As part of a snack
WHY	Tasty Physical/Mental Energy	Tasty Connection	Tasty Healthy & Nutritious
WHERE	At home	At home	At home
WHO WITH	With Family	With Family	With Family

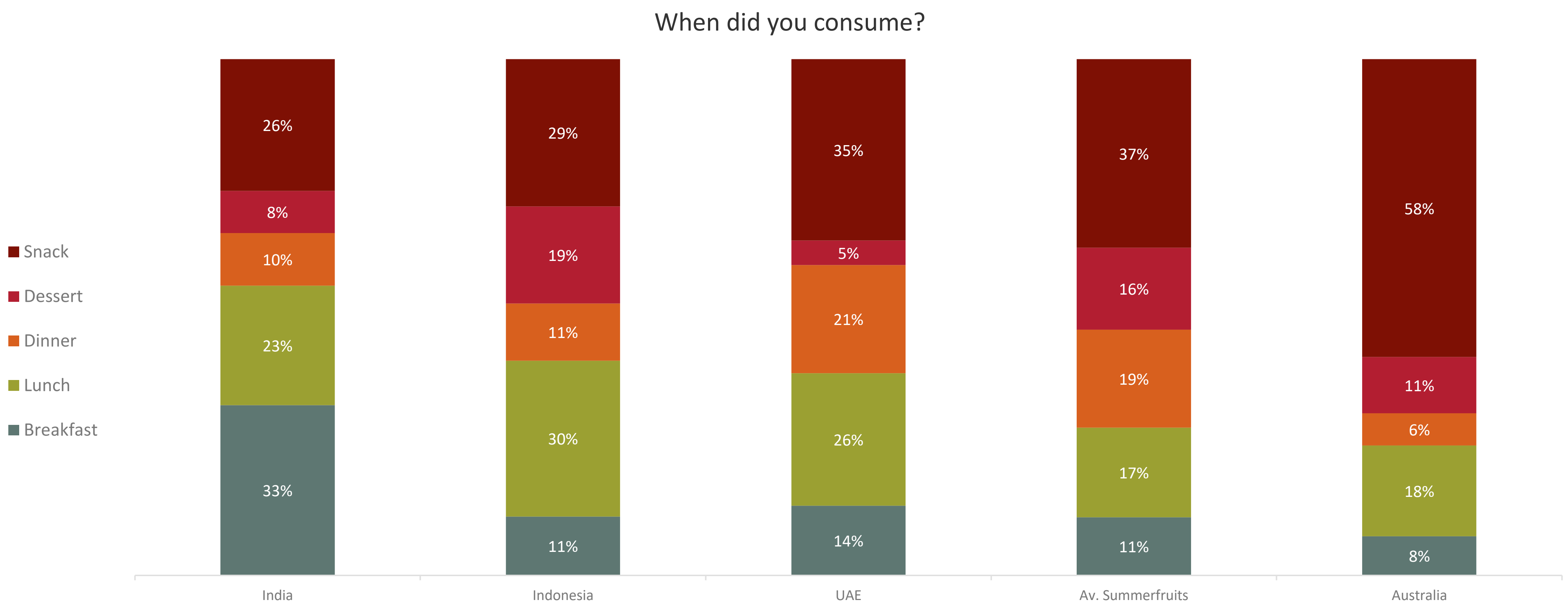
Source: Kantar HIA International Demand Study 2022

Summerfruit: Strategic Imperatives

Summer
Fruit

	India	Indonesia	UAE
CONSUMER PREFERENCES	As a tasty breakfast or snack for physical and mental energy, fresh on its own, at home with family	As a tasty lunch or snack between lunch and dinner, fresh on its own or as part of a snack, to connect with family at home	As a tasty, healthy & nutritious snack or lunch, fresh on its own or as part of a snack, at home with family
NEEDS TO SATISFY	Tasty Physical/Mental Energy	Tasty Connection	Tasty Healthy & Nutritious
FUNCTIONAL ATTRIBUTES	Refreshing Taste	Refreshing Taste	Refreshing Taste Fresh & Light
PREMIUM OPPORTUNITY	Fresher High in vitamins & minerals	Fresher Higher in vitamins and minerals	Fresher More flavour
BARRIERS TO OVERCOME	Too expensive	Too expensive More exciting alternatives	Too expensive Poor Quality More exciting alternatives
KEY SUBSTITUTES	Apple	Apple Mango	Apple Bananas

Summerfruits are consumed at lunch or snack across priority markets along with breakfast in India

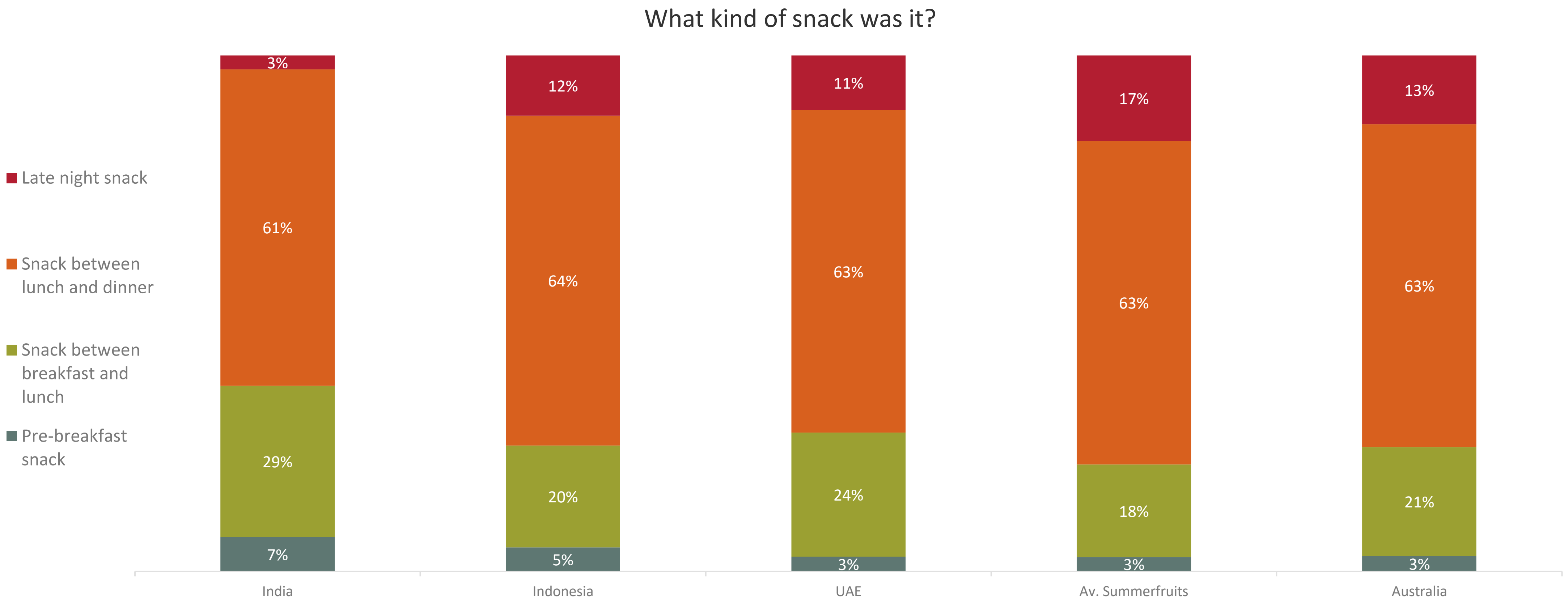


Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	301	295	294	303	301	292	223	294	290	298	296	39

When consumed as a snack, Summerfruits are typically consumed between lunch and dinner

Summer Fruit



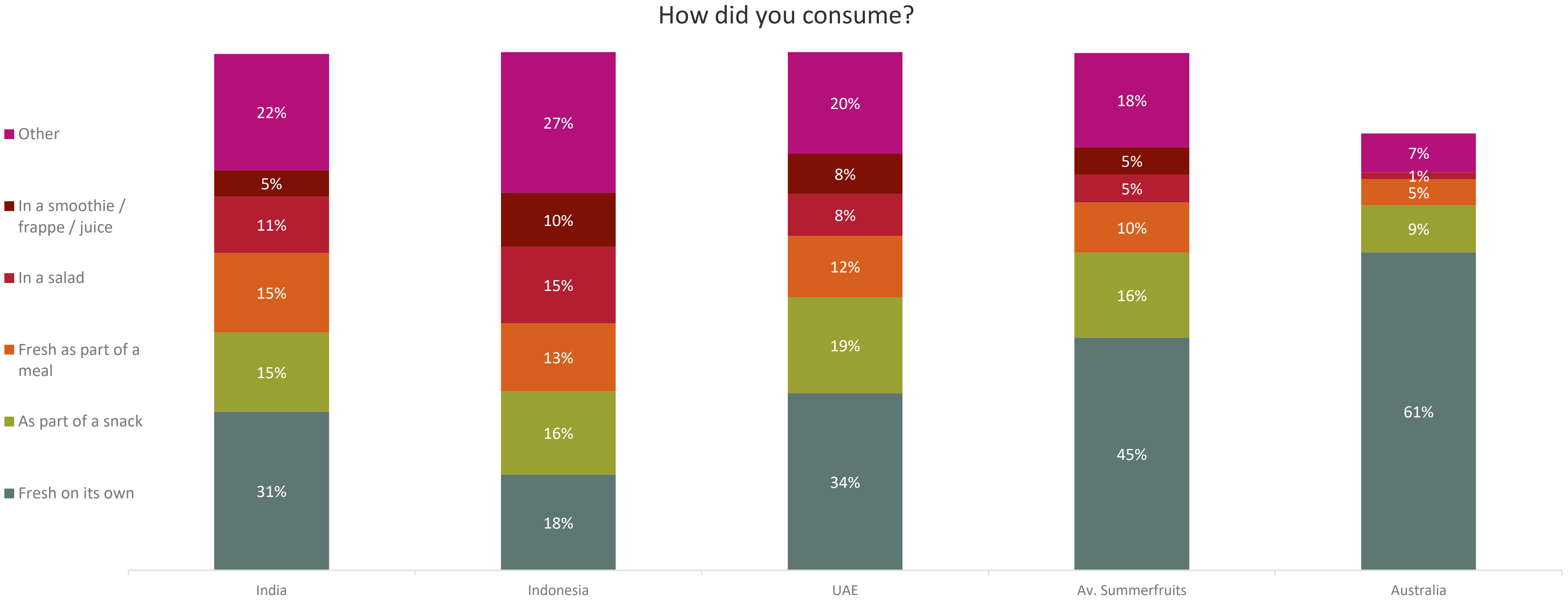
KANTAR

Source: Kantar HIA International Demand Study 2023

Hort Innovation

Summerfruits are typically consumed fresh on their own or as part of a snack across priority markets

Summer Fruit



'Other' = In a salad, As an ingredient in baking, Cooked on its own, As an ingredient in cooking, For decoration / show only, To make baby food / puree, As part of an alcoholic drink e.g. cocktail And Don't know

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	301	295	294	303	301	292	223	294	290	298	296	39

KANTAR

Hort Innovation

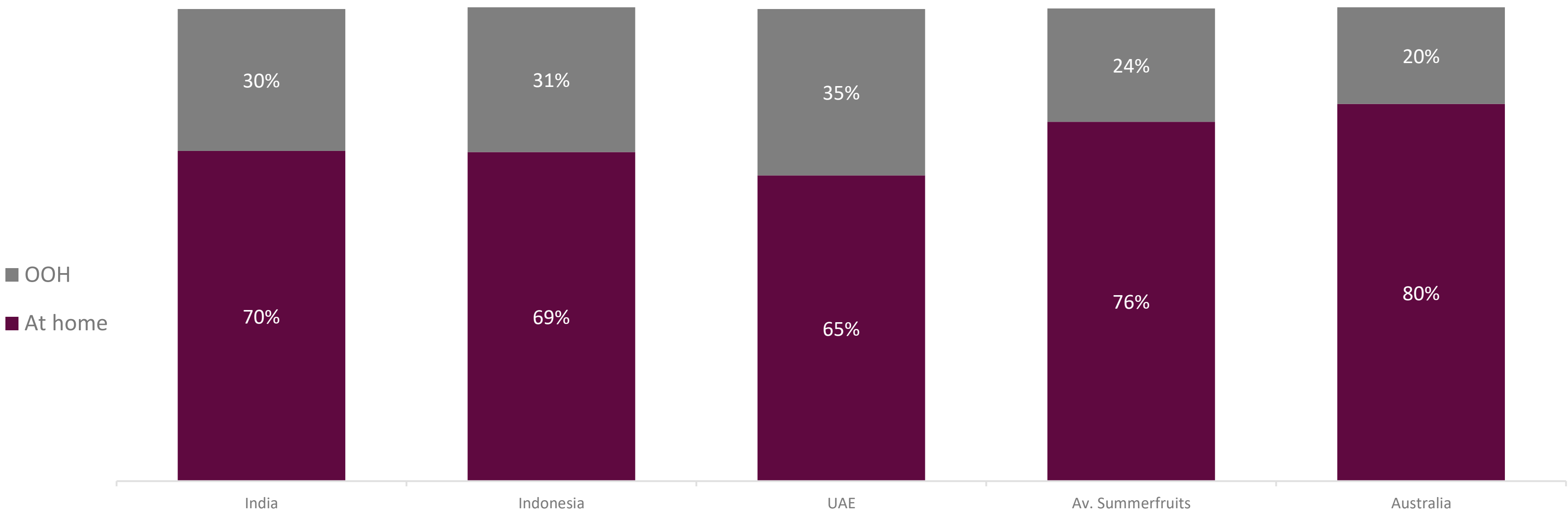
Most people consume Summerfruit at home

Summer Fruit

Where were you?

76%

of consumption of summerfruits is in the home, this varies only slightly by market



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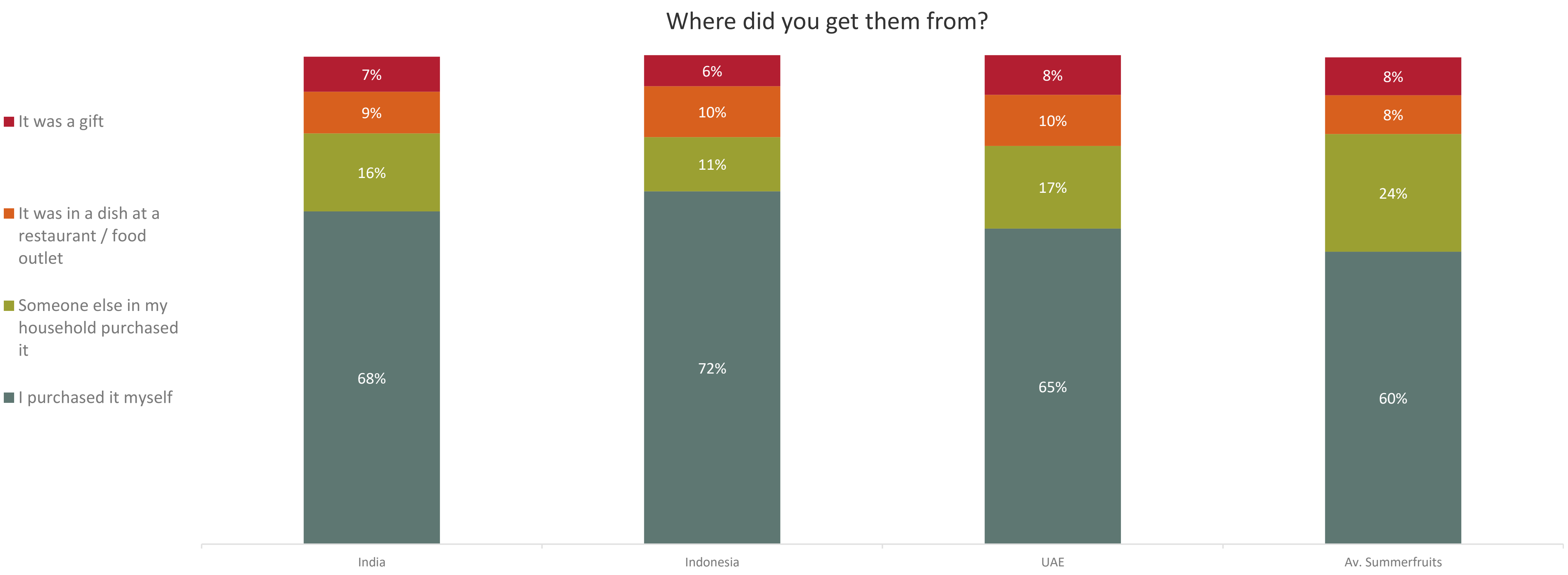
Hort Innovation

Most people purchase Summerfruits themselves

Summer Fruit



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Hort Innovation

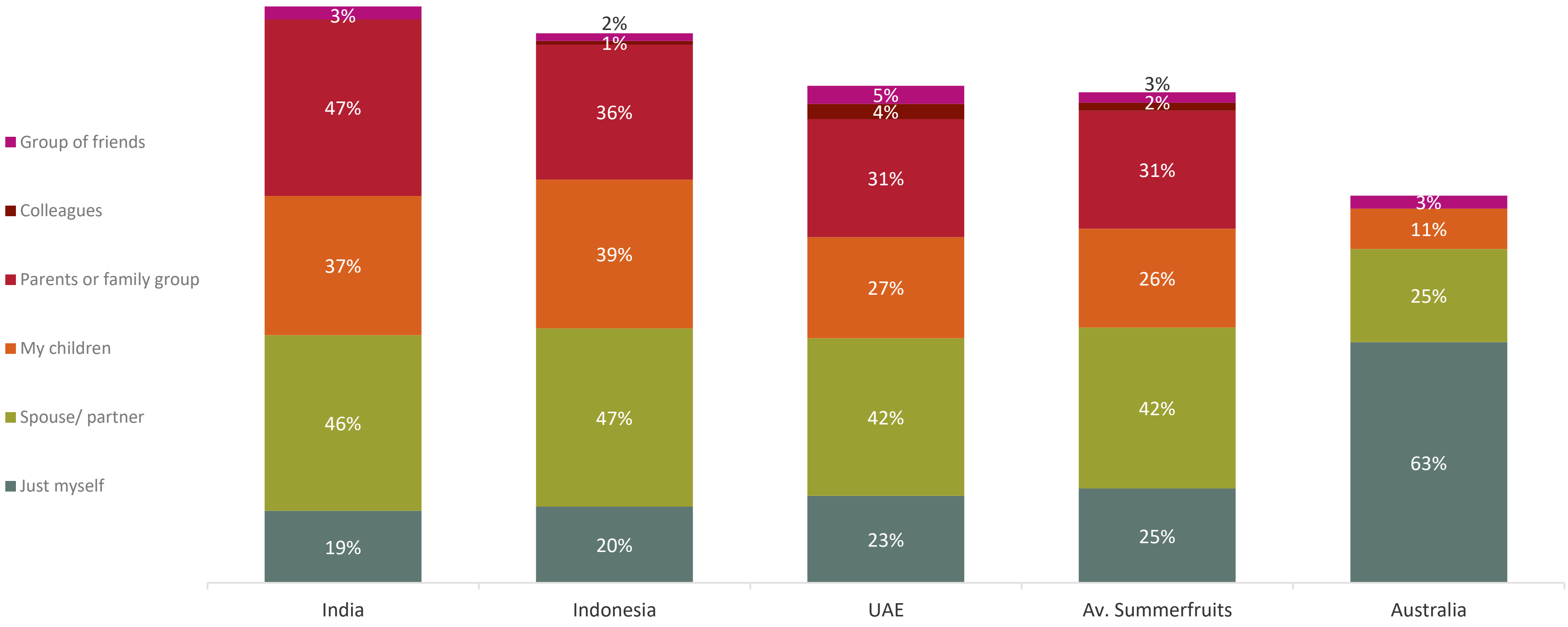
Summerfruits are typically consumed with a spouse or partner or with a broader family group

Summer Fruit

Who were you with?

31%

of consumption of summerfruits (on average) is with children.



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Hort Innovation

There is a range of reasons why people choose to eat different fruits & vegetables. There are
6 universal consumer needs pillars that drive this choice for consumers globally

The 6 needs pillars are universal across commodities and global markets

Tasty

All about: Taste, Refreshment, and Enjoyment

Quick & Easy

All about: Convenience Simplicity, and Ease

Healthy & Nutritious

All about: Guilt-free, Nourishing and Sensible

Indulgence

All about: Comfort, Relaxation and Self Care

Physical & Mental Energy

All about: Energy, Uplift, and Reinvigoration

Connection

All about: Bonding, Celebration and Creating Memories

KANTAR

Hort Innovation

In priority markets, the most important reasons why people choose to consume Summerfruits are for something tasty, healthy & nutritious and for a connection

62%

of people in priority markets consume Summerfruits for something

Tasty

45%

of people in priority markets consume Summerfruits for something

Healthy & Nutritious

43%

of people in priority markets consume Summerfruits for a

Connection

Taste is the most important consumption driver across all markets, followed by quick and easy

Summer Fruit

Which were important when choosing to consume?

	India	Indonesia	UAE	Av	Aus
Tasty	64%	62%	59%	62%	63%
Quick & Easy	42%	42%	43%	44%	66%
Healthy & Nutritious	45%	44%	45%	34%	29%
Indulgence	38%	43%	38%	38%	29%
Physical & Mental Energy	47%	32%	43%	27%	30%
Connection	42%	49%	38%	28%	12%

KANTAR

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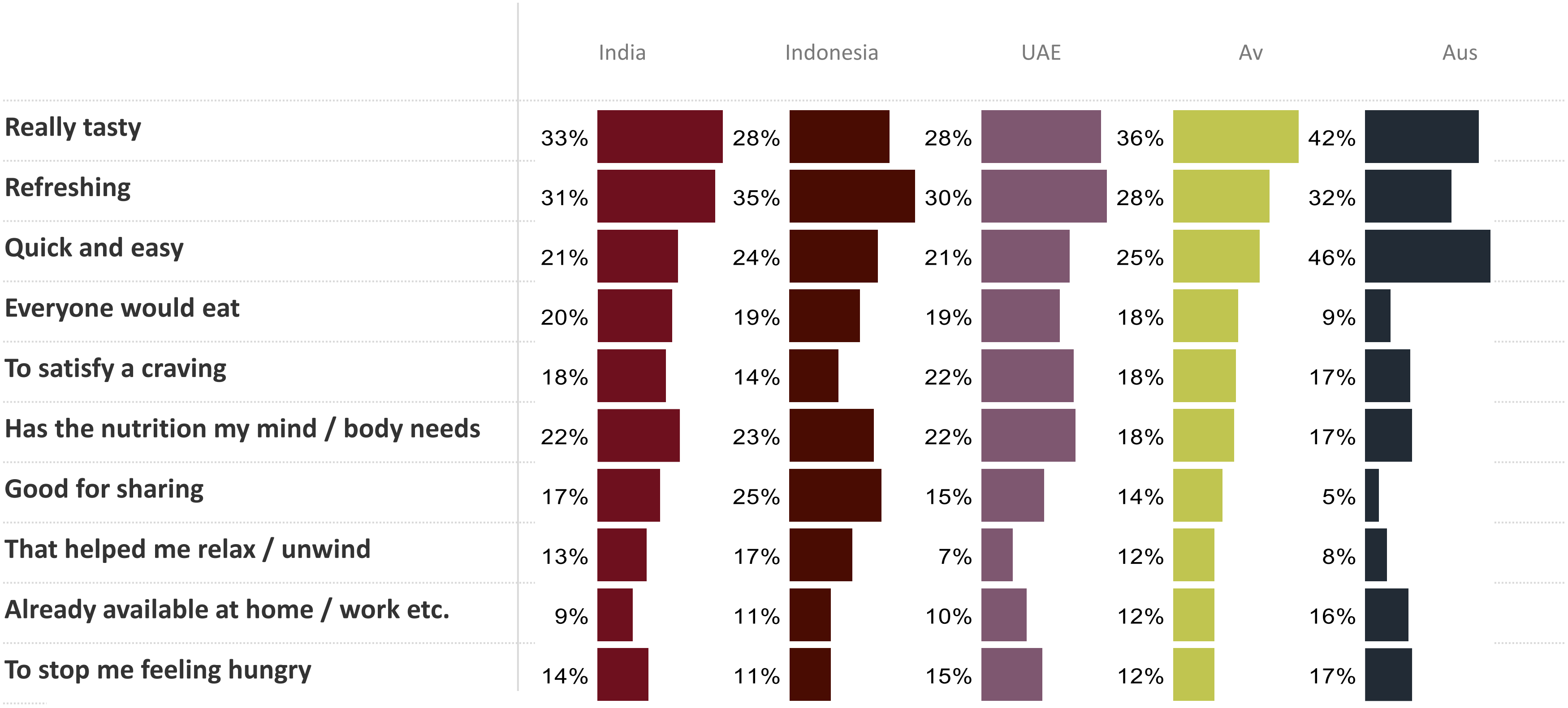
Hort Innovation

Summer Fruit

Specifically, consumers in priority markets are looking for Summerfruits to be 'refreshing', 'tasty' and 'quick and easy'. Good for sharing is also a driver in Indonesia

Which were important when choosing to consume?



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Hort Innovation

More functionally, consumers are looking for Summerfruits that are sweet while still being light and refreshing

28%

of people in priority markets are looking for Summerfruits that have

Refreshing taste

23%

of people in priority markets are looking for Summerfruits that are

Fresh / Light

20%

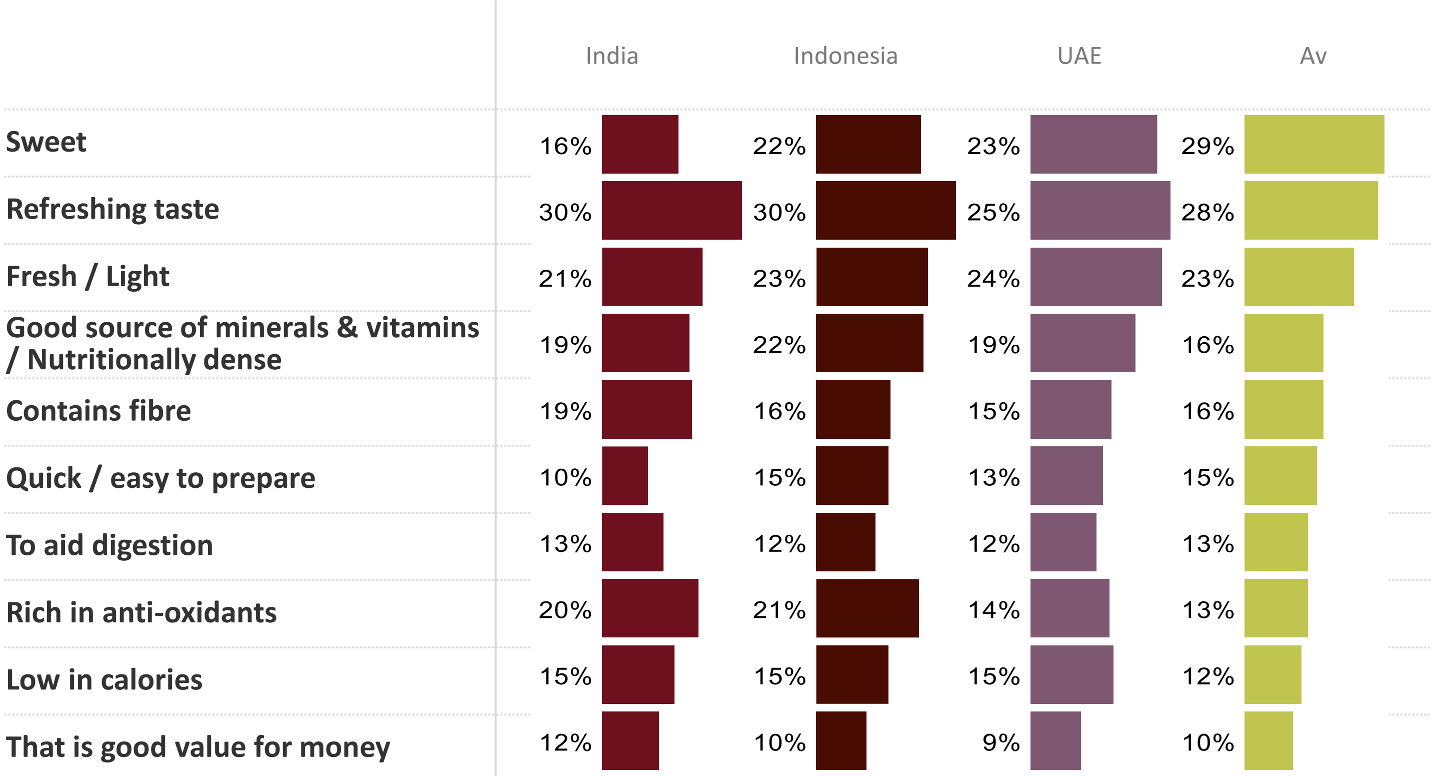
of people in priority markets are looking for Summerfruits that are

Sweet

Summer Fruit

Functionally, across priority markets, consumers look for refreshing taste whilst still being refreshing. In India and Indonesia they also look for rich in anti-oxidants

What were you looking for when you consumed?



When it comes to the premium opportunity, consumers are looking for Summerfruits that are fresher, have more flavour, are higher in vitamin & mineral content, and are safe & trusted

43%

of people in priority markets are looking for premium Summerfruits that are

Fresher

30%

of people in priority markets are looking for premium Summerfruits that are

Higher in vitamins and minerals

29%

of people in priority markets are looking for premium Summerfruits that have

More flavour

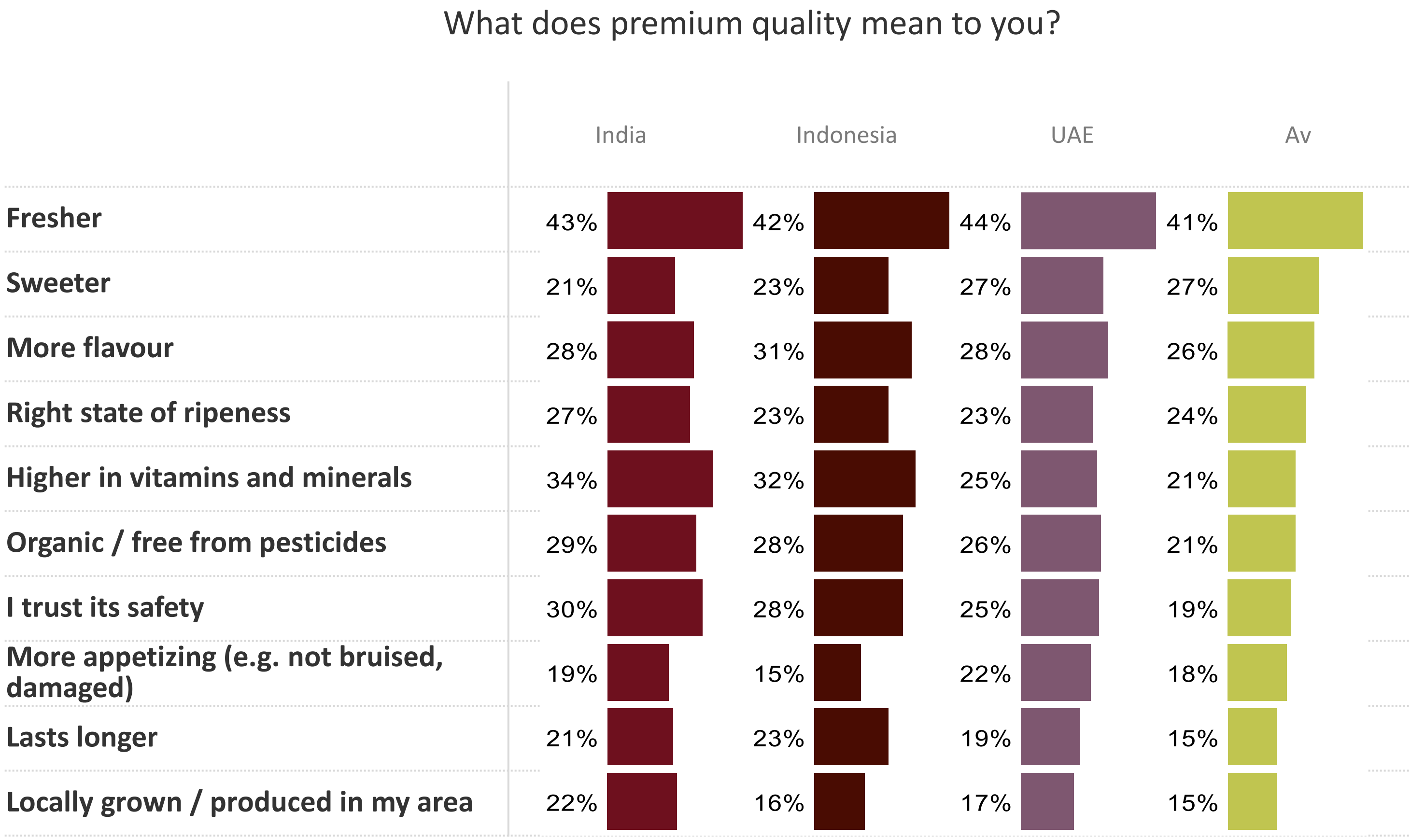
28%

of people in priority markets are looking for premium Summerfruits that are

Safe & Trusted

Summer Fruit

Premium is characterised by freshness and more flavour across priority markets along with higher in vitamins and minerals in India and Indonesia



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Hort Innovation

Price is the biggest barrier to overcome with Summerfruits consumption, followed by exciting alternatives and poor quality.

Apples and Mangoes are considered worthy substitutes

Barriers to Consumption

Price	Exciting Alternatives	Poor Quality
26% (priority market average)	17% (priority market average)	17% (priority market average)

Leading Substitutes

Apples	Mangoes	Banana
47% (priority market average)	42% (priority market average)	41% (priority market average)

Price is a key barrier across priority markets along with more exciting alternatives, poor quality and lack of popularity in household

Summer Fruit

What are the reasons you may not choose?

	India	Indonesia	UAE	Av
It is too expensive	23%	29%	26%	30%
It bruises easily	13%	9%	16%	17%
Quality is often poor	15%	16%	19%	14%
It goes off too quickly / it does not last	11%	9%	13%	13%
There are more exciting alternatives	14%	19%	19%	12%
They are never in the right state of ripeness when sold in shops	11%	13%	14%	11%
It contains too much sugar	14%	11%	12%	11%
It is too messy to eat	13%	10%	11%	10%
Not enough people in my household like it/them	16%	14%	17%	10%
I don't really like the taste	10%	11%	9%	9%

KANTAR

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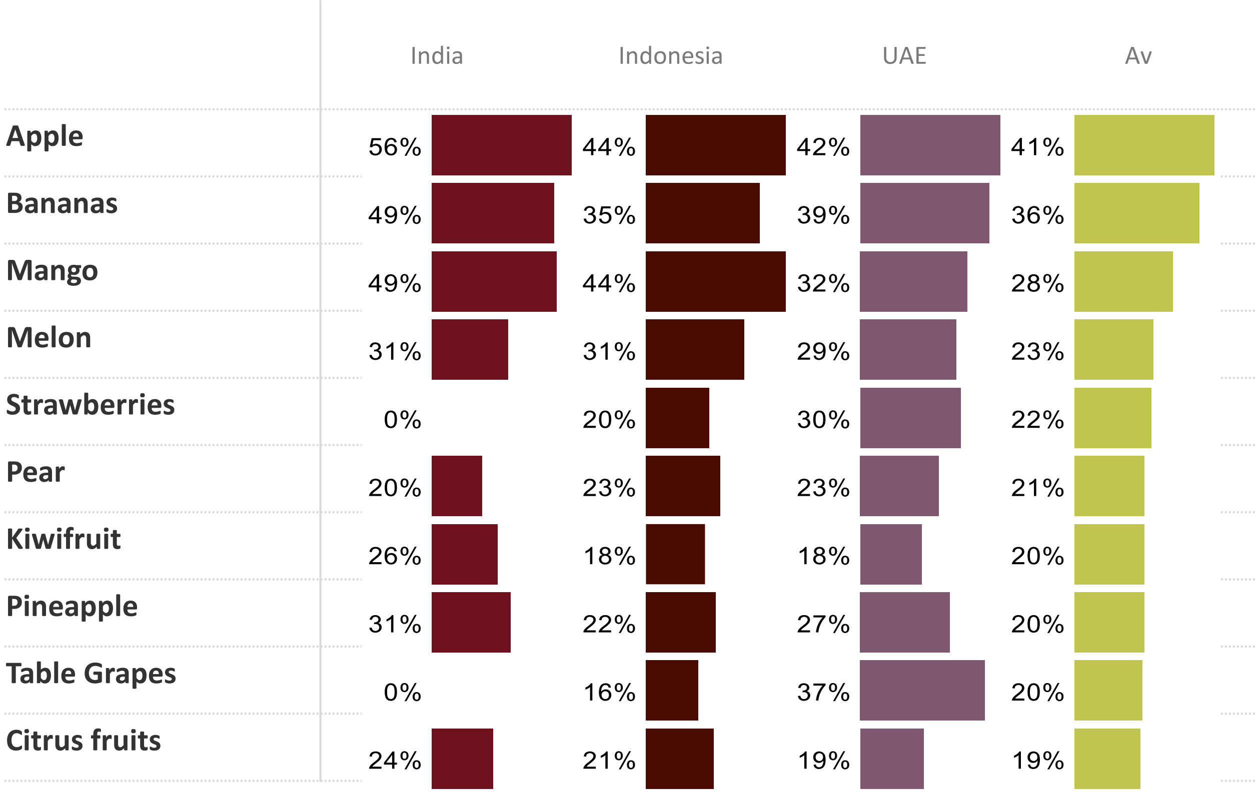
Hort Innovation

Apples, Bananas, Mangos and in UAE, Table Grapes are key substitutes

Summer Fruit

What else would you typically consider having instead?



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Hort Innovation

Recommendation: How to drive growth in Australian Summerfruits

Summer Fruit

1. Focus on Strategic Priority Markets

Focus on markets where consumers are **willing to pay a premium** for quality Summerfruits (ie. **Indonesia, UAE, and India**). Leverage already **high appeal for Australian Summerfruits in Indonesia, and Improve knowledge and appeal UAE and India** to drive incremental growth in Australian Summerfruit exports.

2. Deliver Core Consumer Needs

Deliver the core consumer needs across priority markets with Summerfruits that have a **refreshing taste, are healthy & nutritious, and are good for sharing**. Ensure Summerfruits are at or above par for being **refreshing, fresh and light, and rich in anti-oxidants, that are served as an efficient lunch or snack.**

3. Leverage Premium Advantage

Maximise the premium opportunity by delivering Summerfruits that are fresher, have more flavour, are higher in vitamins and minerals, are free of pesticides, and come from a safe and trusted source.

4. Reduce Consumption Barriers

Address perceptions that Summerfruits are **too expensive, are poor quality, and are less exciting than alternatives,** to minimise consumer drift to close substitutes like Apples, Bananas and Mangoes**.**

'Where to Play'

'How to Win'

KANTAR

3.13
Table Grapes

i. Market prioritisation
Leverage the strategic framework to prioritize markets based on consumer behaviour, perception and market access

ii. Commodity profiling

In-depth data profiling of how the commodity is consumed across markets, premium triggers and barriers

Hort Innovation

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- This research is intended to **support and inform industry** decisions regarding the progress of any potential future or ongoing market access or market improvement request

2. Markets with Existing Trade

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In evaluating attractive and addressable export markets, we have intentionally used data that shows where premium opportunities can be found

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  - High commodity penetration in a market has also been used to evaluate attractiveness, but this analysis favours markets where there is a larger opportunity for Australian products to command a **premium**.

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The evaluation and prioritisation of export markets into the 4 quadrants of attractiveness and addressability **is intended to be only one input into decision making** about **where to focus investment**

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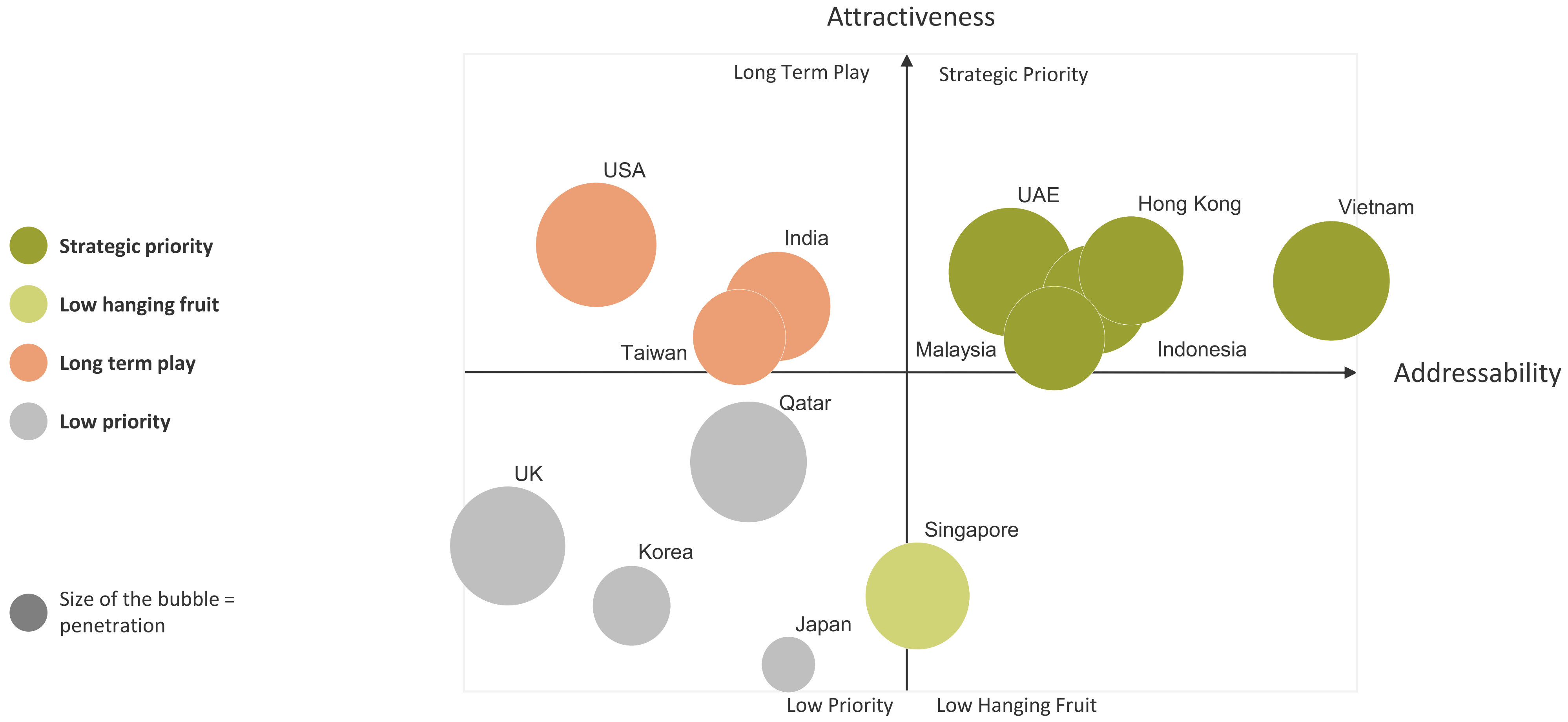
    - Export decisions should be made using all available information including the economics of local growers and exporters and this report forms one input into that decision process

We have identified 5 strategic priority markets that represent the most attractive and appealing export opportunity for Australian table grapes, based on consumer preference and behaviour

Table Grapes



Source: Kantar HIA International Demand Study 2022, World Bank 2021

Table Grapes: Strategic priorities

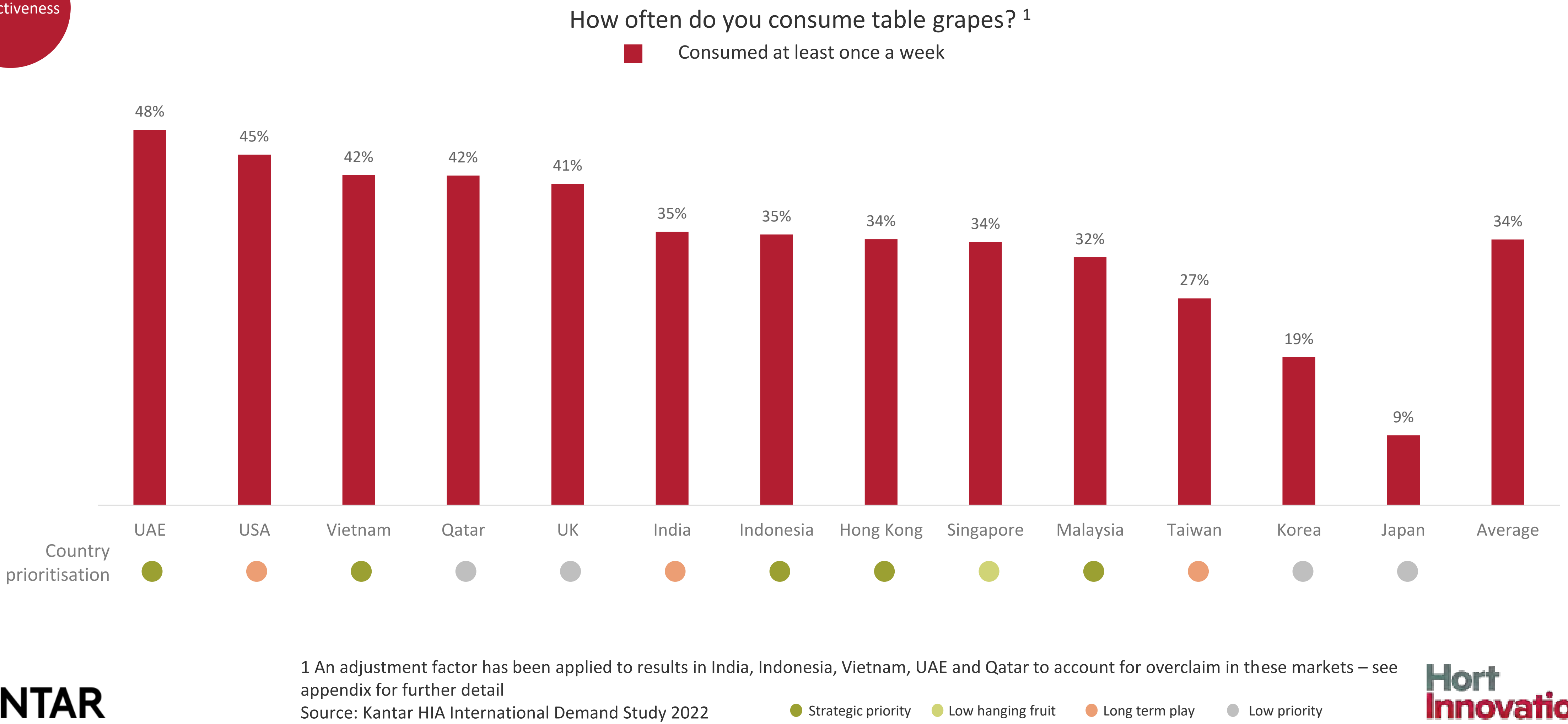
Table Grapes

	Malaysia	Hong Kong	Vietnam	Indonesia	UAE
STRATEGIC IMPLICATIONS	Despite moderate penetration, Malaysia presents a strong opportunity for Table Grapes given the appetite for premium and the willingness to pay	Hong Kong represents a strong export opportunity for Table Grapes given the their ability to command a premium over other commodities in the market	Vietnam represents a strong export opportunity given the population size and particularly strong Australian appeal	Indonesia represents a strong Table Grapes opportunity given the strong willingness to pay 1.5x more	Despite the small population, UAE is a strong opportunity given the high penetration, strong Australian appeal and high per capita income
ATTRACTIVENESS	• Moderate category penetration (32% at least once a week) • Strong claimed willingness to pay 1.5x more	• Moderate category penetration (34%) • Very high claimed willingness to pay 1.5x more	• High category penetration (42%) • Strong claimed willingness to pay 1.5x more	• Moderate category penetration (35%) • Strong claimed willingness to pay 1.5x more	• Highest category penetration (48%) • Moderate claimed willingness to pay 1.5x
ADDRESSABILITY	• Australian appeal is moderate • More likely to command a premium than other commodities in Malaysia	• Moderate Australian appeal • Much more likely to command a premium over other commodities in Hong Kong	• Extremely high Australian appeal • Moderate likelihood to command a premium	• High Australian appeal • Slightly less likely to command a premium over other commodities	• Strong Australian appeal • Slightly less likely to command a premium over other commodities

Penetration of Table Grapes is high across all markets with the exception of Japan and Korea

Table Grapes

Attractiveness



1 An adjustment factor has been applied to results in India, Indonesia, Vietnam, UAE and Qatar to account for overclaim in these markets – see appendix for further detail

Source: Kantar HIA International Demand Study 2022

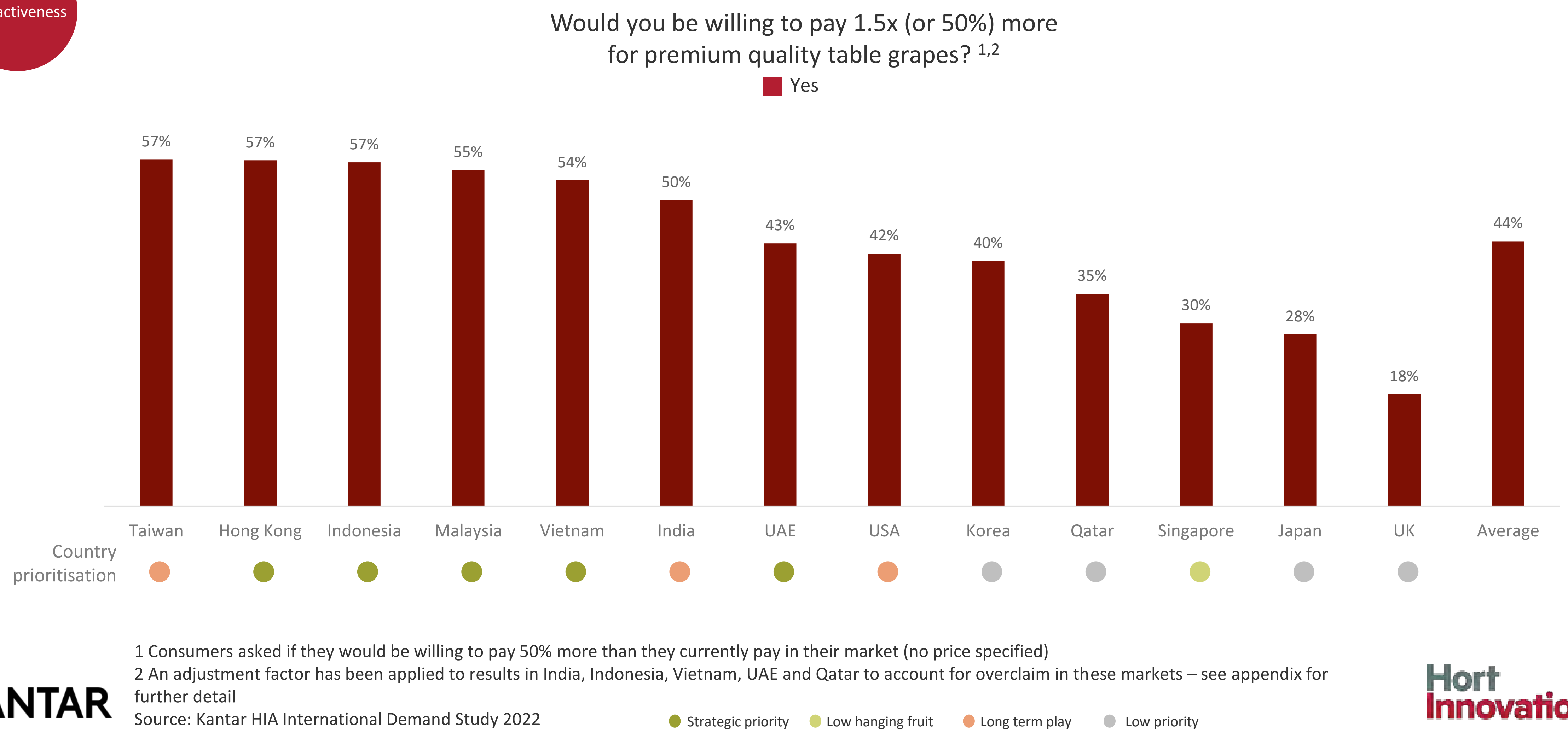
KANTAR

Hort Innovation

Willingness to pay 1.5x more is strongest in Asian markets such as Taiwan, HK, Indonesia, Malaysia, Vietnam and India

Table Grapes

Attractiveness



1 Consumers asked if they would be willing to pay 50% more than they currently pay in their market (no price specified)

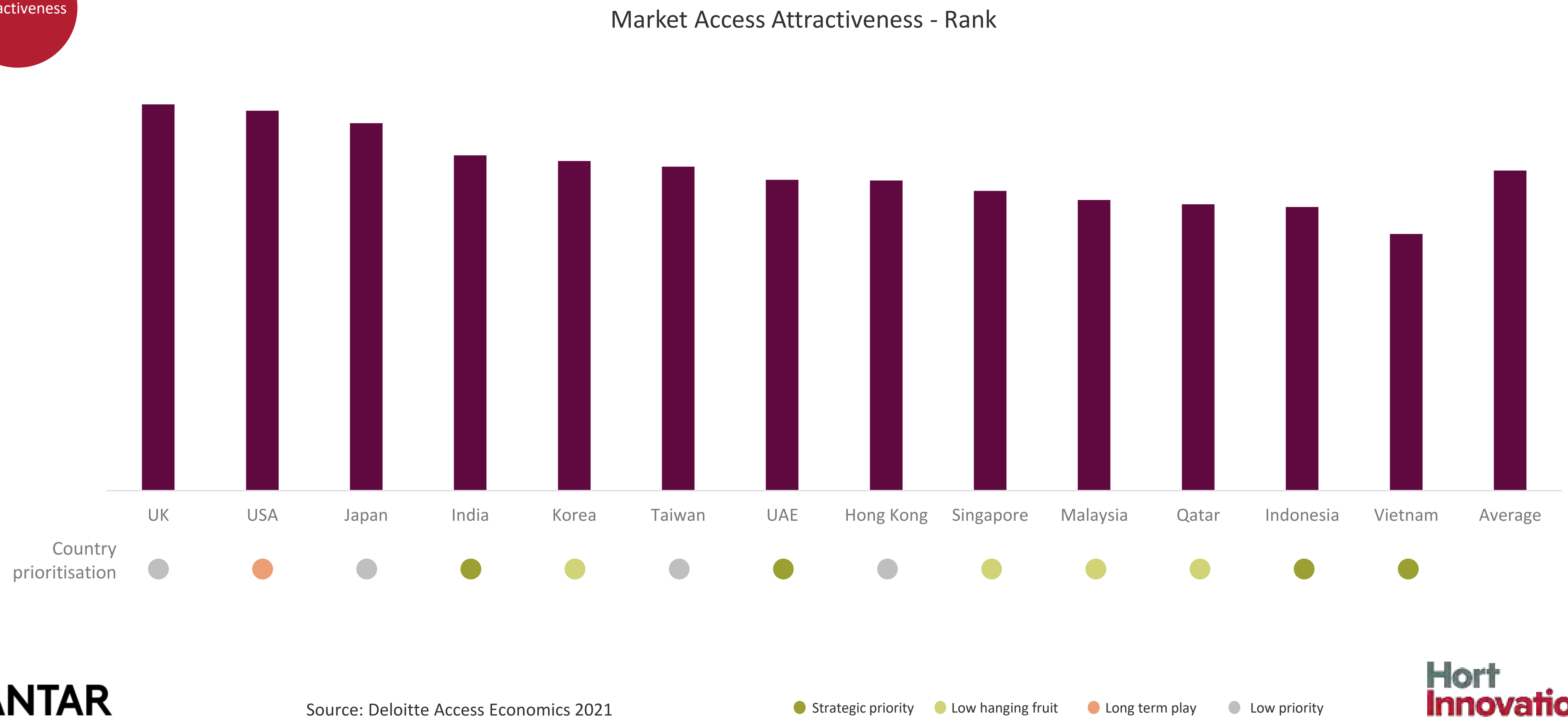
2 An adjustment factor has been applied to results in India, Indonesia, Vietnam, UAE and Qatar to account for overclaim in these markets – see appendix for further detail

Source: Kantar HIA International Demand Study 2022

Although all markets are attractive, more affluent markets with larger populations rank more highly

Table Grapes

Attractiveness

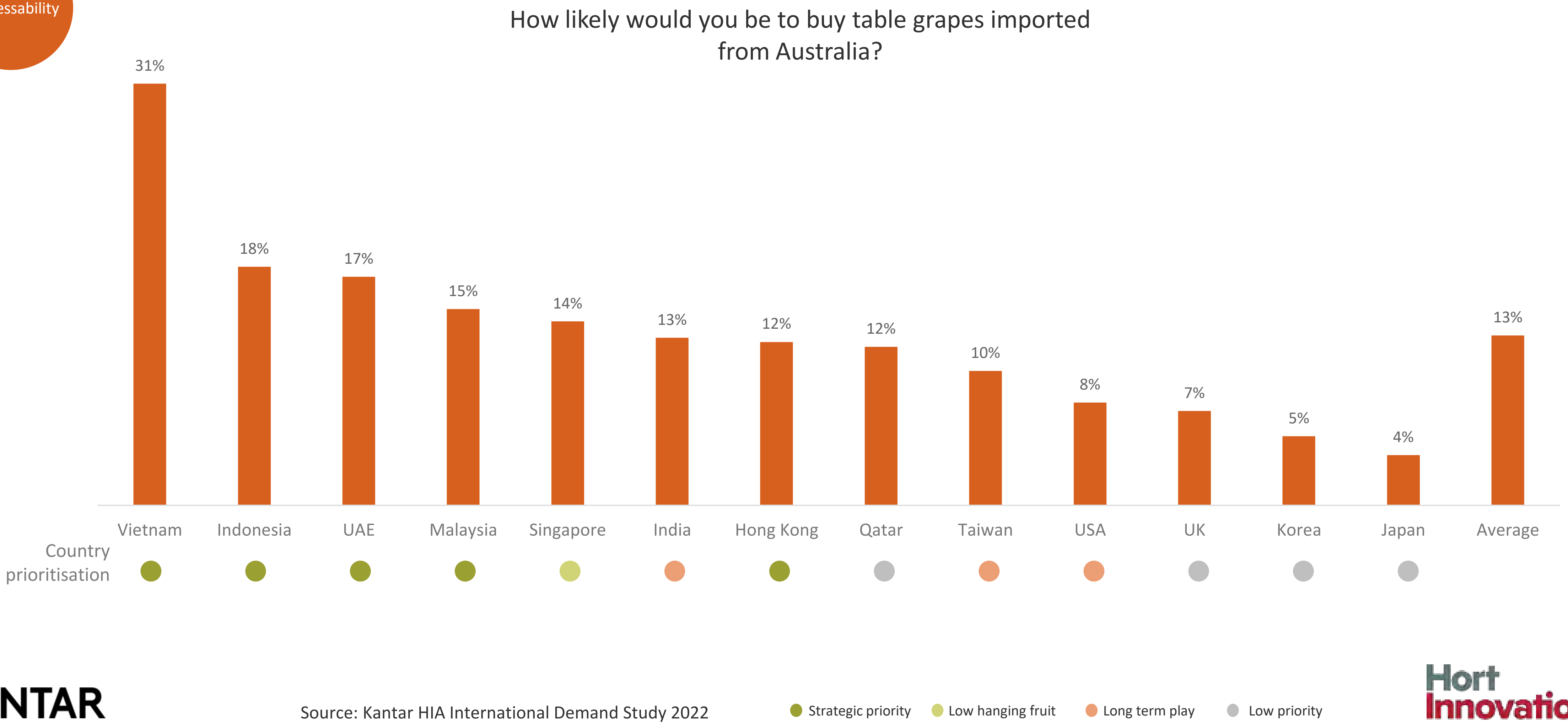


Source: Deloitte Access Economics 2021

Australian appeal is relatively low across the markets with the exception of Vietnam

Table Grapes

Addressability



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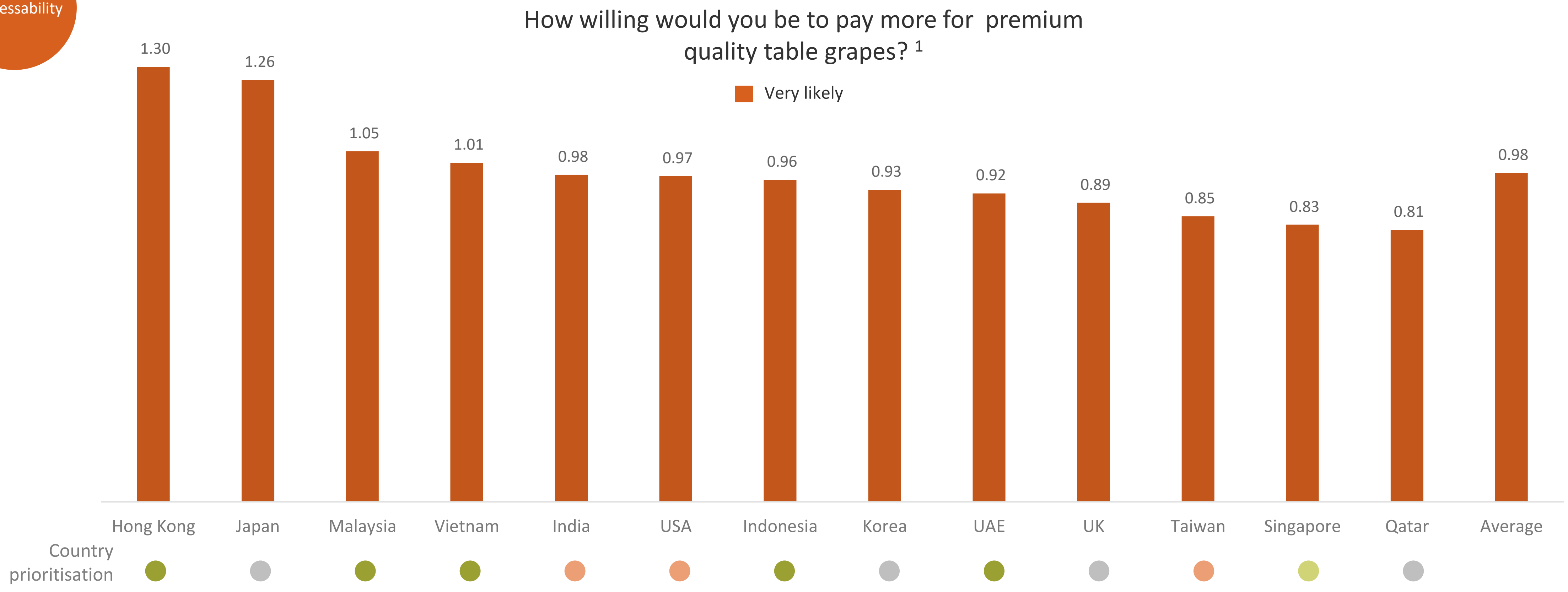
Source: Kantar HIA International Demand Study 2022

Hort Innovation

Table Grapes are more able to command a premium in HK, Japan, Malaysia and Vietnam vs other commodities

Table Grapes

Addressability



KANTAR

1 An index of the relative likelihood to pay more for table grapes vs other commodities within each market

Source: Kantar HIA International Demand Study 2022

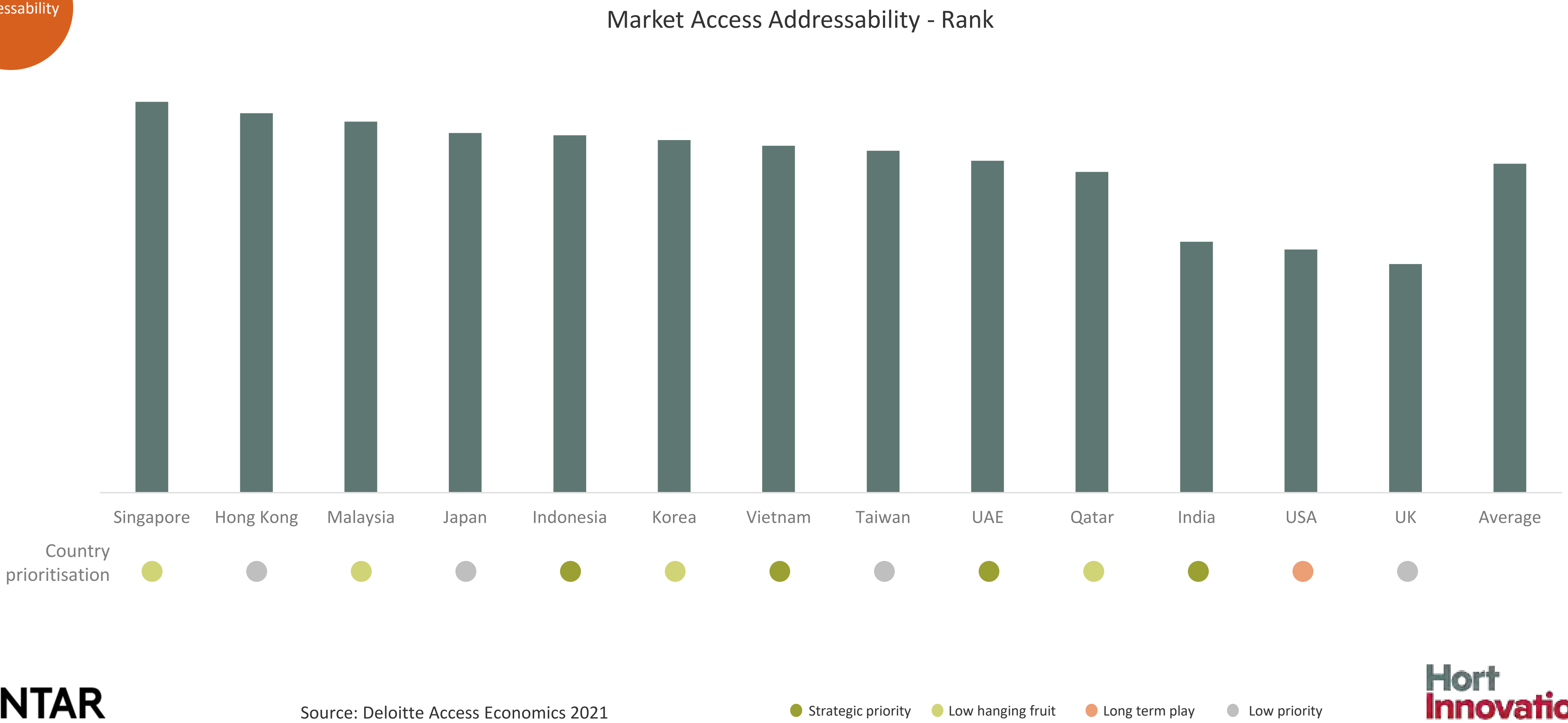
Strategic priority · Low hanging fruit · Long term play · Low priority

Hort Innovation

Some markets rank as more addressable due to the ease of trade, market risk and value chain competitiveness

Table Grapes

Addressability



Source: Deloitte Access Economics 2021

KANTAR

3.13
Table Grapes

i. Market prioritisation
Leverage the strategic framework to prioritize markets based on consumer behaviour, perception and market access

ii. Commodity profiling
In-depth data profiling of how the commodity is consumed across markets, premium triggers and barriers

Hort Innovation

The prioritisation revealed x5 markets ripe for Table Grapes export. The next section will deep dive into Table Grapes consumption across markets

Table Grapes

USA | UK | Singapore | India | Japan | Hong Kong | South Korea

Market priorities

Malaysia | UAE | Qatar | Taiwan | Vietnam | Indonesia

Market priorities

Strategic priority | Low hanging fruit | Long term play | Low priority

Table Grapes consumption snapshot

Table Grapes

	Malaysia	Hong Kong	Vietnam	Indonesia	UAE
HOW OFTEN (P1W pen.)	32%	34%	42%	25%	48%
WHEN	Snack between lunch and dinner	Snack between lunch and dinner	Dessert Lunch Dinner	Dessert Snack Lunch	Snack between lunch and dinner
HOW	Fresh on its own	Fresh on its own	Fresh on its own As part of a snack	Fresh on its own As part of a snack	Fresh on its own
WHY	Tasty Quick & Easy	Tasty Quick & Easy	Tasty Indulgence	Tasty Quick & Easy	Tasty Quick & Easy
WHERE	At home	At home	At home	At home	At home
WHO WITH	With Family	With Family	With Family	With Family	With Family

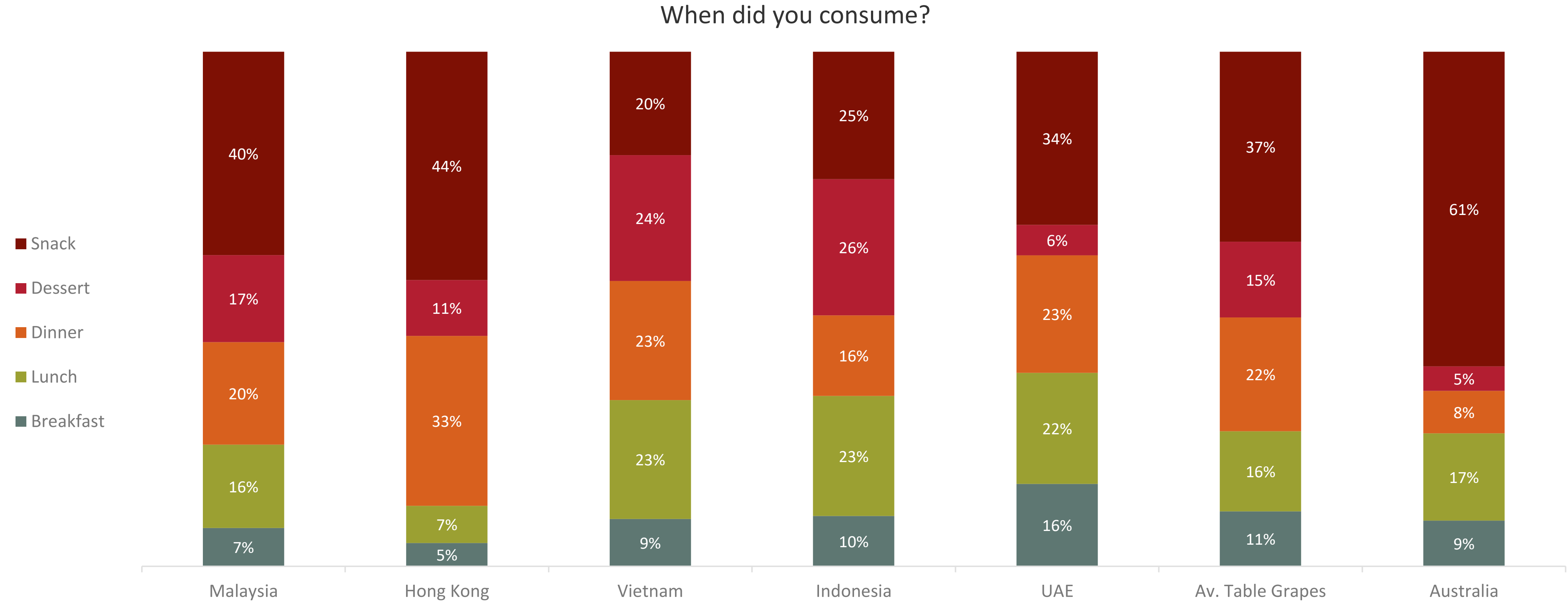
Table Grapes: Strategic Imperatives

Table Grapes

	Malaysia	Hong Kong	Vietnam	Indonesia	UAE
CONSUMER PREFERENCES	As a tasty, quick & easy snack between lunch and dinner, fresh on its own, at home with family	As a tasty, quick & easy snack between lunch and dinner or dinner, fresh on its own, at home with family	As a tasty and indulgent dessert, lunch or dinner, fresh on its own or as part of a snack, at home with family	As a tasty, quick & easy dessert, snack or lunch, fresh on its own or as part of a snack, at home with family	As a tasty, quick & easy snack between lunch and dinner, fresh on its own, at home with family
NEEDS TO SATISFY	Tasty Quick & Easy	Tasty Quick & Easy	Tasty Indulgence	Tasty Quick & Easy	Tasty Quick & Easy
FUNCTIONAL ATTRIBUTES	Refreshing taste Sweet	Sweet Fresh & Light	Refreshing taste Sweet	Refreshing Taste Sweet	Fresh & Light Refreshing taste Sweet
PREMIUM OPPORTUNITY	Fresher Sweeter	Fresher More flavour Sweeter	Fresher Sweeter Appetising	Fresher Sweeter Free from pesticides	Fresher Sweeter
BARRIERS TO OVERCOME	Too expensive	Too expensive Too much sugar	Bruises easily Too expensive	Poor quality	Too expensive
KEY SUBSTITUTES	Apple Bananas	Apple Bananas Strawberries	Apple	Apple Mango Bananas	Apple Bananas

Table Grapes are most frequently consumed as a snack in Malaysia, Hong Kong and UAE or as a dessert or at lunch in Vietnam and Indonesia

Table Grapes



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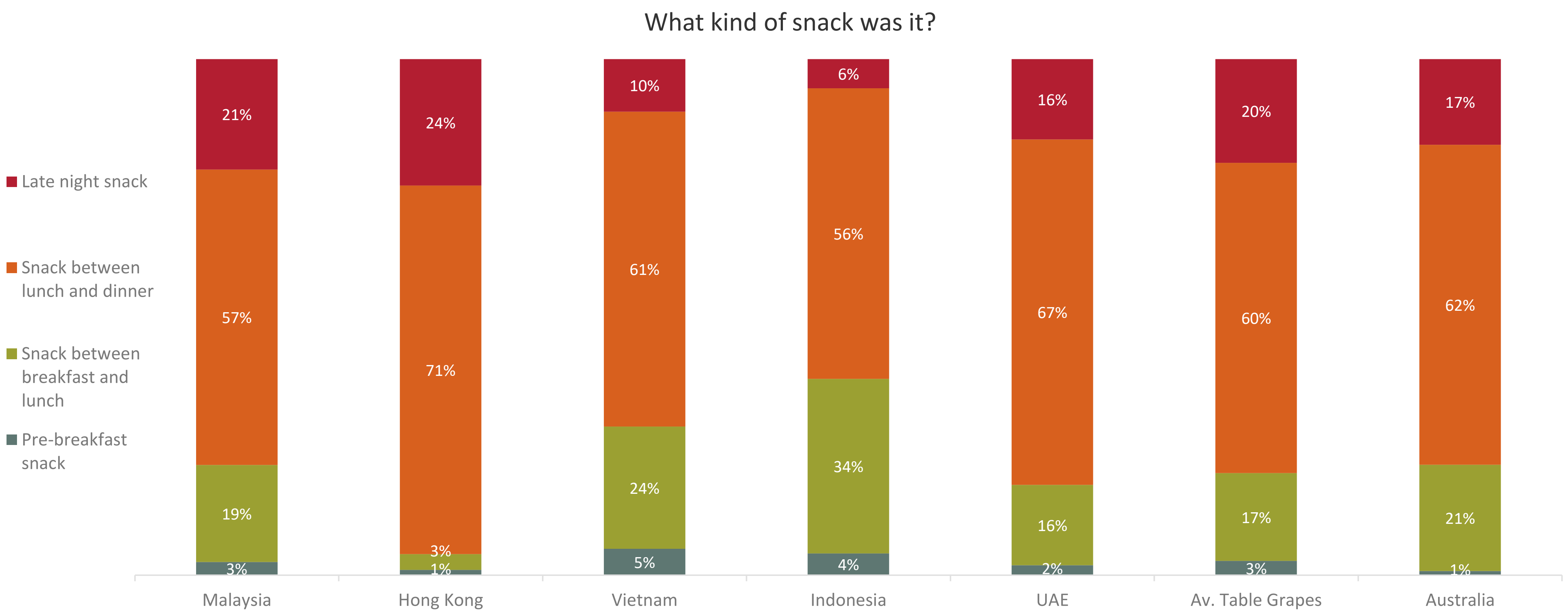
Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	295	296	300	299	296	221	294	294	287	306	40

Hort Innovation

When consumed as a snack, Table Grapes are typically consumed between lunch and dinner

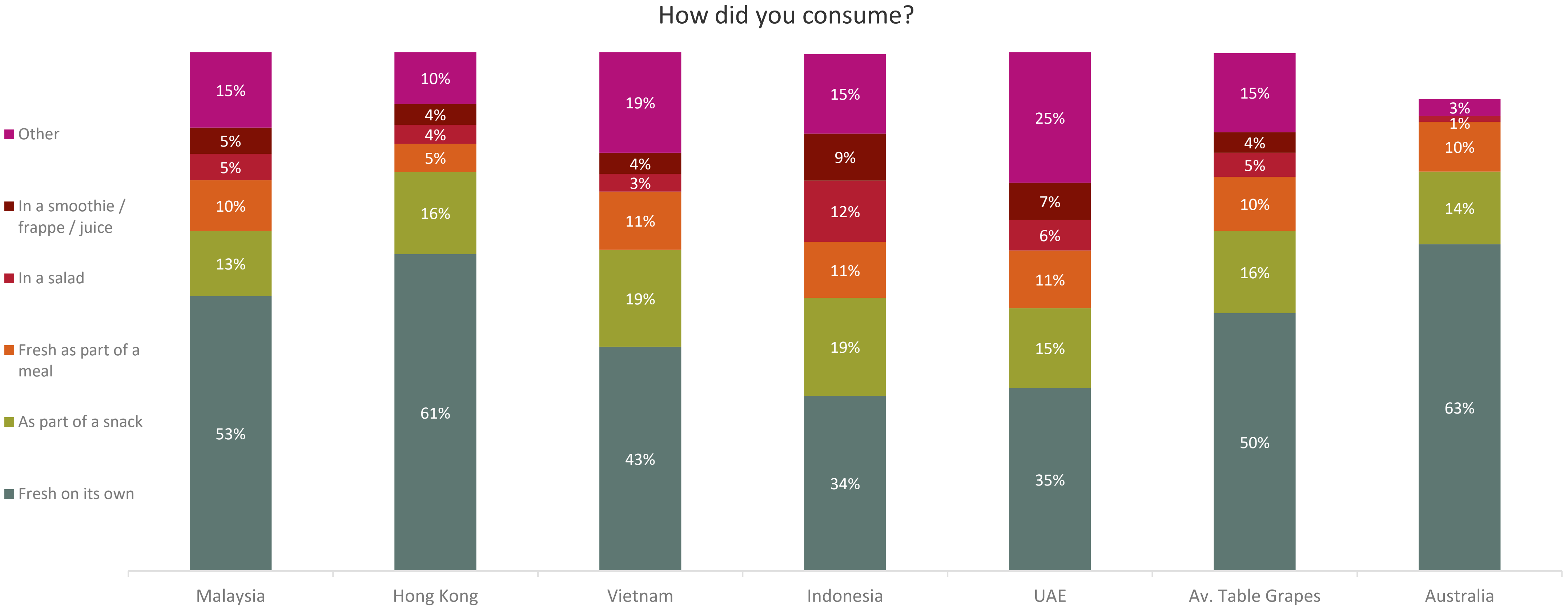
Table Grapes



Source: Kantar HIA International Demand Study 2023

Table Grapes are most commonly consumed fresh on their own across priority markets, especially in Malaysia and Hong Kong

Table Grapes



'Other' = As a topping (e.g., on yoghurt, as a garnish etc.), Cooked on its own, As an ingredient in cooking, As an ingredient in baking, To make baby food / puree, As part of an alcoholic drink e.g. cocktail, For decoration / show only And Don't know

Source: Kantar HIA International Demand Study 2023

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Hort Innovation

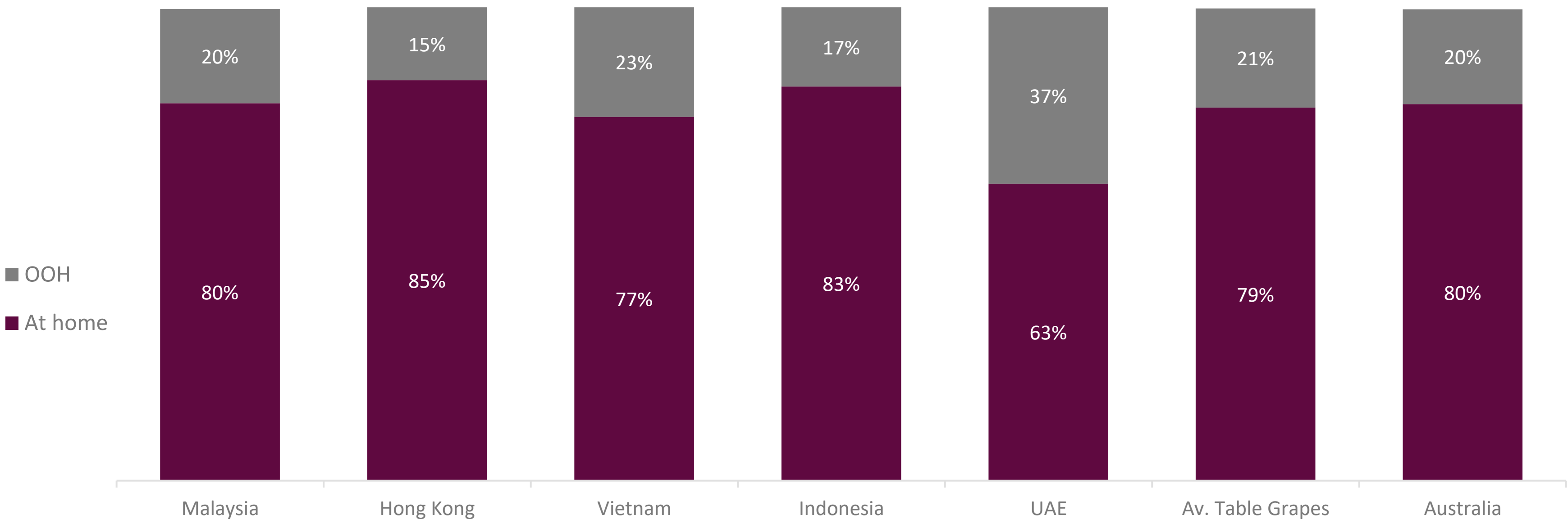
Most people consume Table Grapes at home. UAE skews more out of home

Table Grapes

Where were you?

79%

of consumption of table grapes is in the home, this varies only slightly by market



Source: Kantar HIA International Demand Study 2023

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	292	300	295	296	300	299	296	221	294	294	287	306	40

Most people purchase Table Grapes themselves

Table Grapes

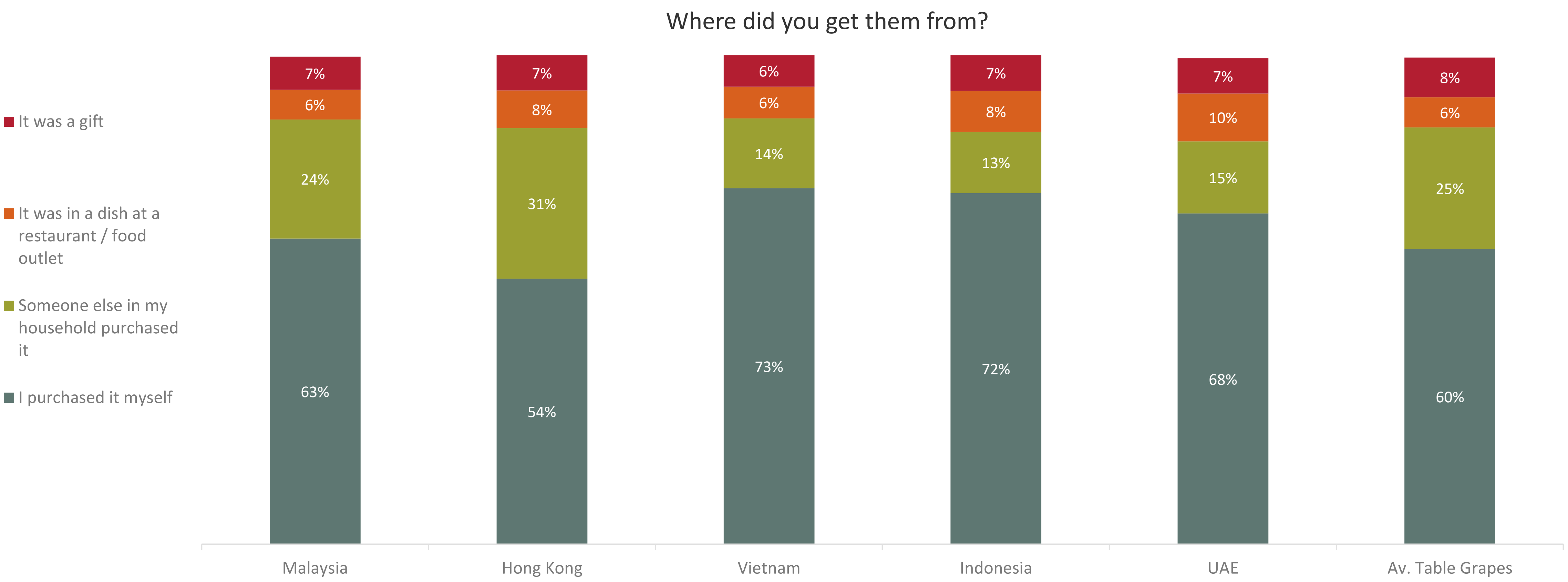

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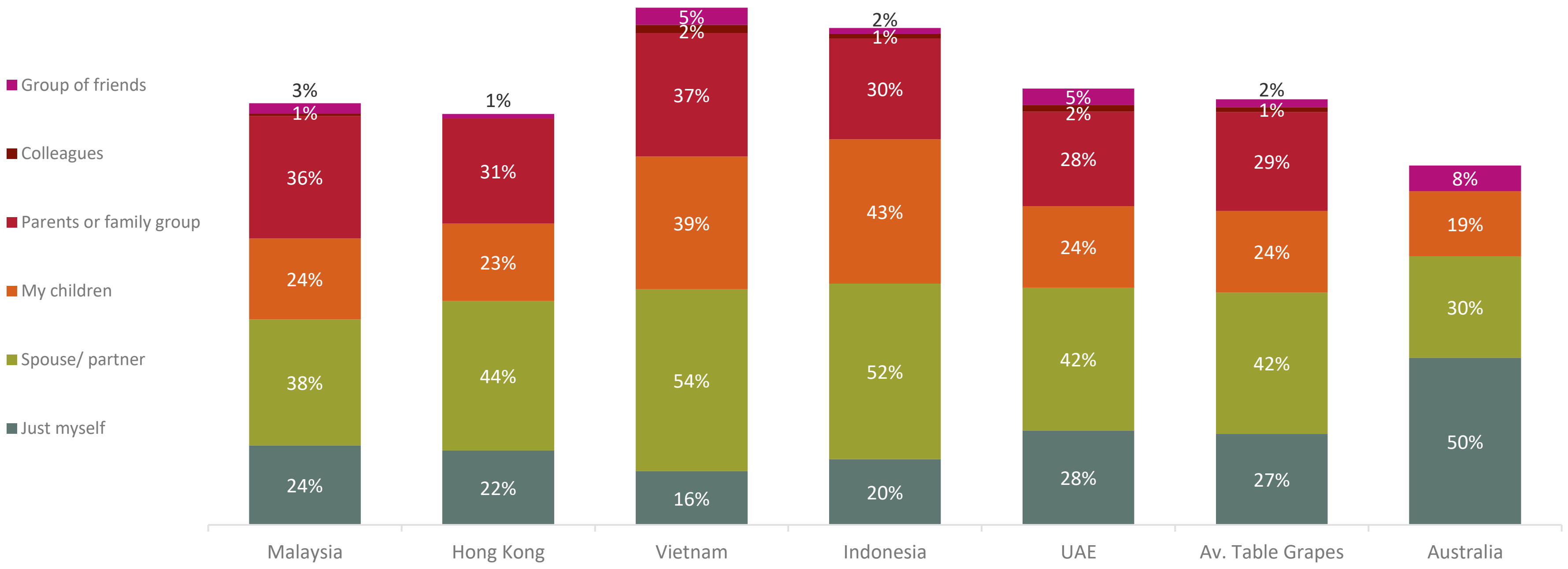
Table Grapes are typically consumed with a spouse or partner or with a broader family group

Table Grapes

Who were you with?

42%

of consumption of table grapes (on average) is with a spouse/partner.



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There is a range of reasons why people choose to eat different fruits & vegetables. There are
6 universal consumer needs pillars that drive this choice for consumers globally

The 6 needs pillars are universal across commodities and global markets

Tasty

All about: Taste, Refreshment, and Enjoyment

Quick & Easy

All about: Convenience Simplicity, and Ease

Healthy & Nutritious

All about: Guilt-free, Nourishing and Sensible

Indulgence

All about: Comfort, Relaxation and Self Care

Physical & Mental Energy

All about: Energy, Uplift, and Reinvigoration

Connection

All about: Bonding, Celebration and Creating Memories

In priority markets, the most important reasons why people choose to consume Table Grapes are for something tasty, quick & easy and indulgent

62%

of people in priority markets consume Table Grapes for something

Tasty

44%

of people in priority markets consume Table Grapes for something

Quick & Easy

41%

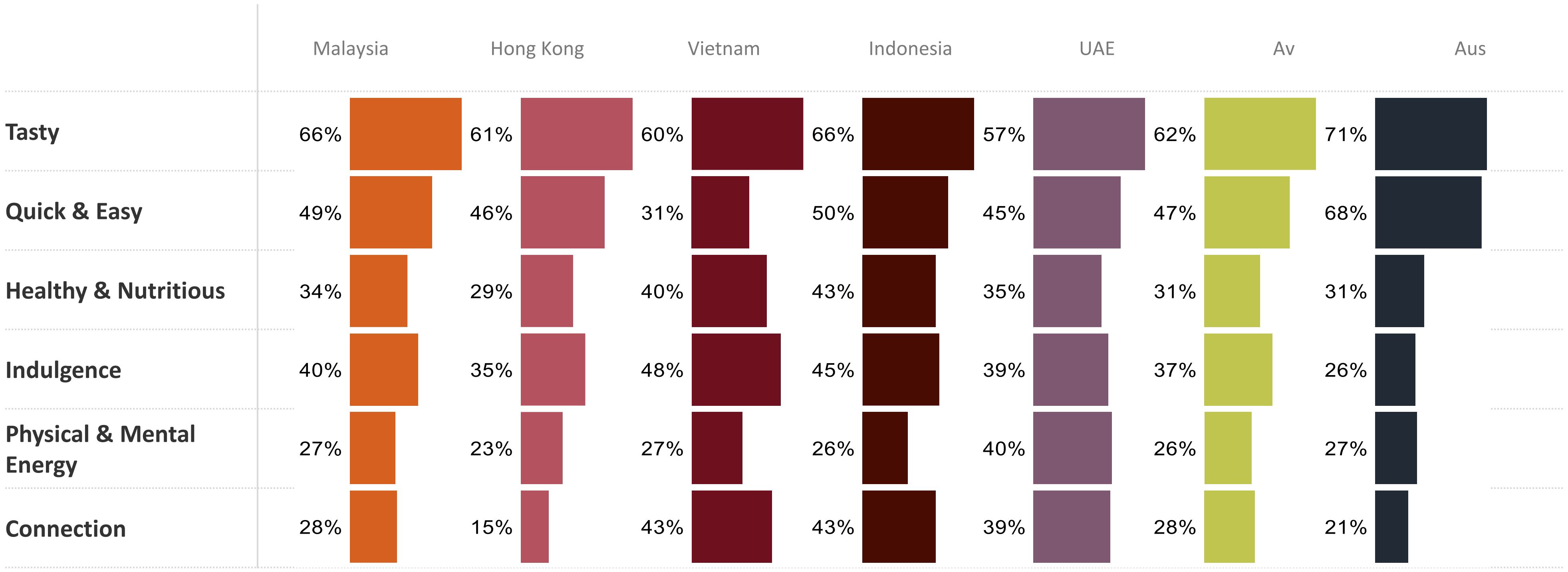
of people in priority markets consume Table Grapes for an

Indulgence

Table Grapes

Taste is the most important consumption driver, followed by indulgence in Vietnam and Indonesia and Quick and Easy in other priority markets

Which were important when choosing to consume?



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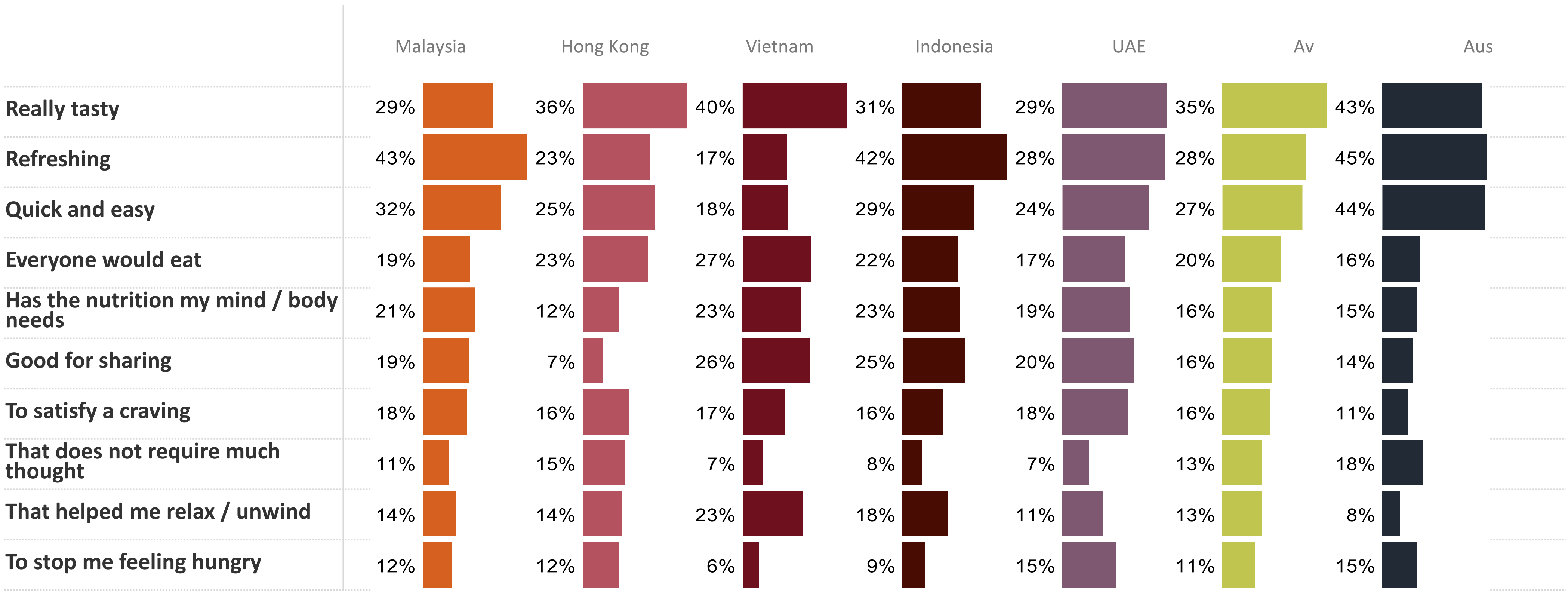
Hort Innovation

Tables Grapes are chosen for being really tasty across priority markets as well as refreshing in Malaysia and Indonesia in particular

Table Grapes

Which were important when choosing to consume?



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Hort Innovation

More functionally, consumers are looking for Table Grapes that are sweet while still being light and refreshing

32%

of people in priority markets are looking for Table Grapes that are

Sweet

32%

of people in priority markets are looking for Table Grapes that have

Refreshing taste

27%

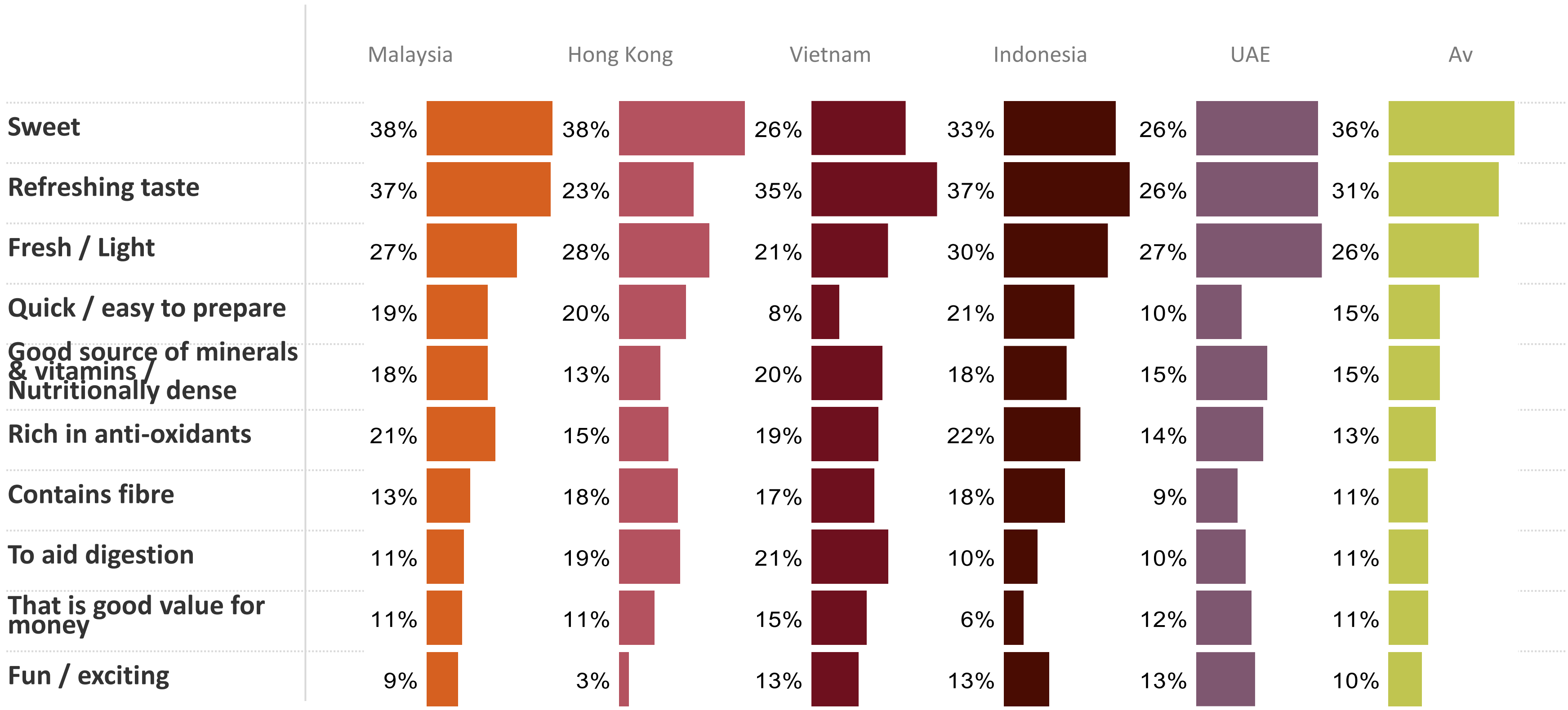
of people in priority markets are looking for Table Grapes that are

Fresh / Light

Across priority markets, consumers look for Table Grapes that are sweet, while still being light and refreshing

Table Grapes

What were you looking for when you consumed?



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Hort Innovation

When it comes to the premium opportunity, consumers are looking for Table Grapes that are fresher, sweeter, have more flavour and are free of pesticides

46%

of people in priority markets are looking for premium Table Grapes that are

Fresher

35%

of people in priority markets are looking for premium Table Grapes that are

Sweeter

27%

of people in priority markets are looking for premium Table Grapes that are

More flavour

25%

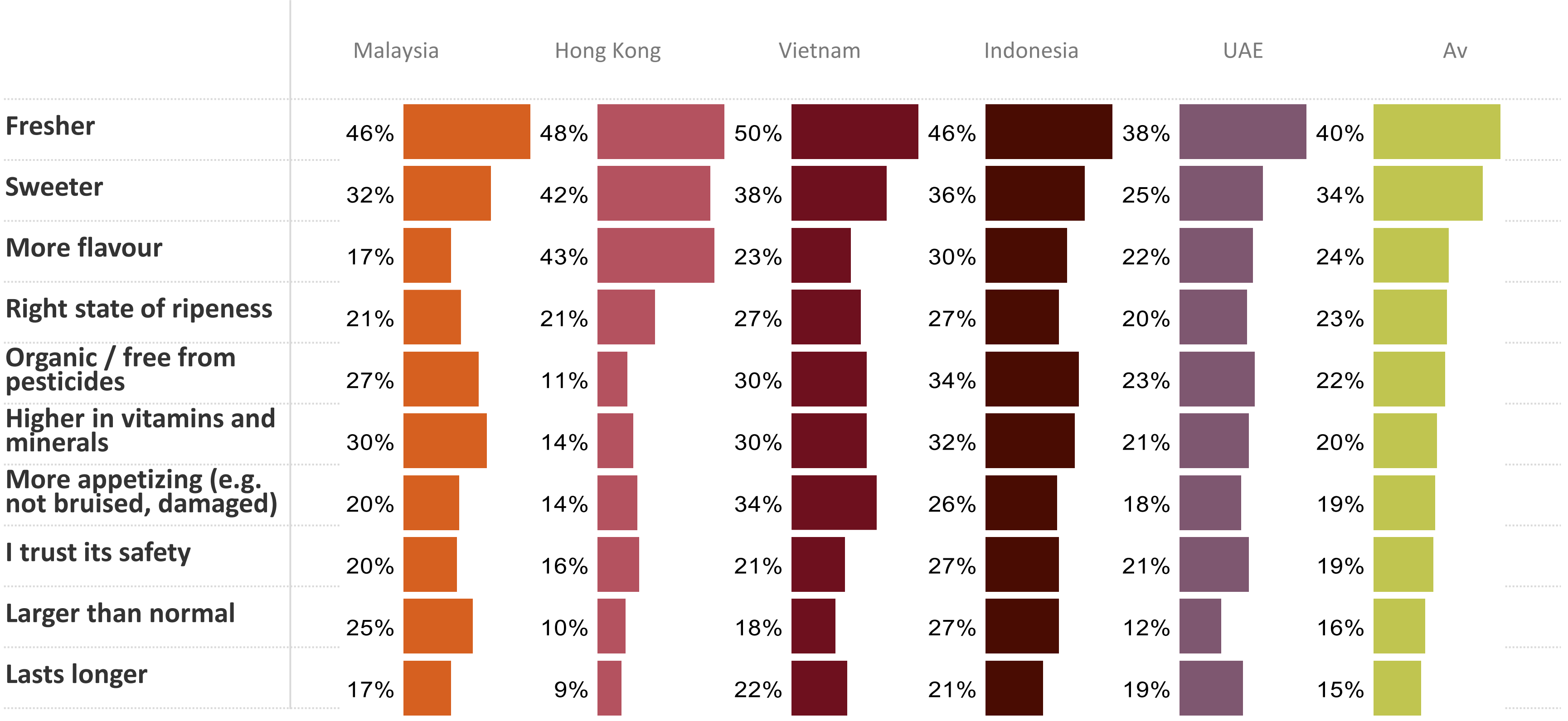
of people in priority markets are looking for premium Table Grapes that are

Free from pesticides

Freshness and sweetness are most desired in premium Table Grapes across priority markets as well as more flavour in Hong Kong

Table Grapes

What does premium quality mean to you?



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Price is the biggest barrier to overcome with Table Grapes consumption, followed by bruising easily and poor quality.

Apples and Bananas are considered worthy substitutes

Barriers to Consumption

Price	Bruise Easily	Poor Quality
33% (priority market average)	20% (priority market average)	17% (priority market average)

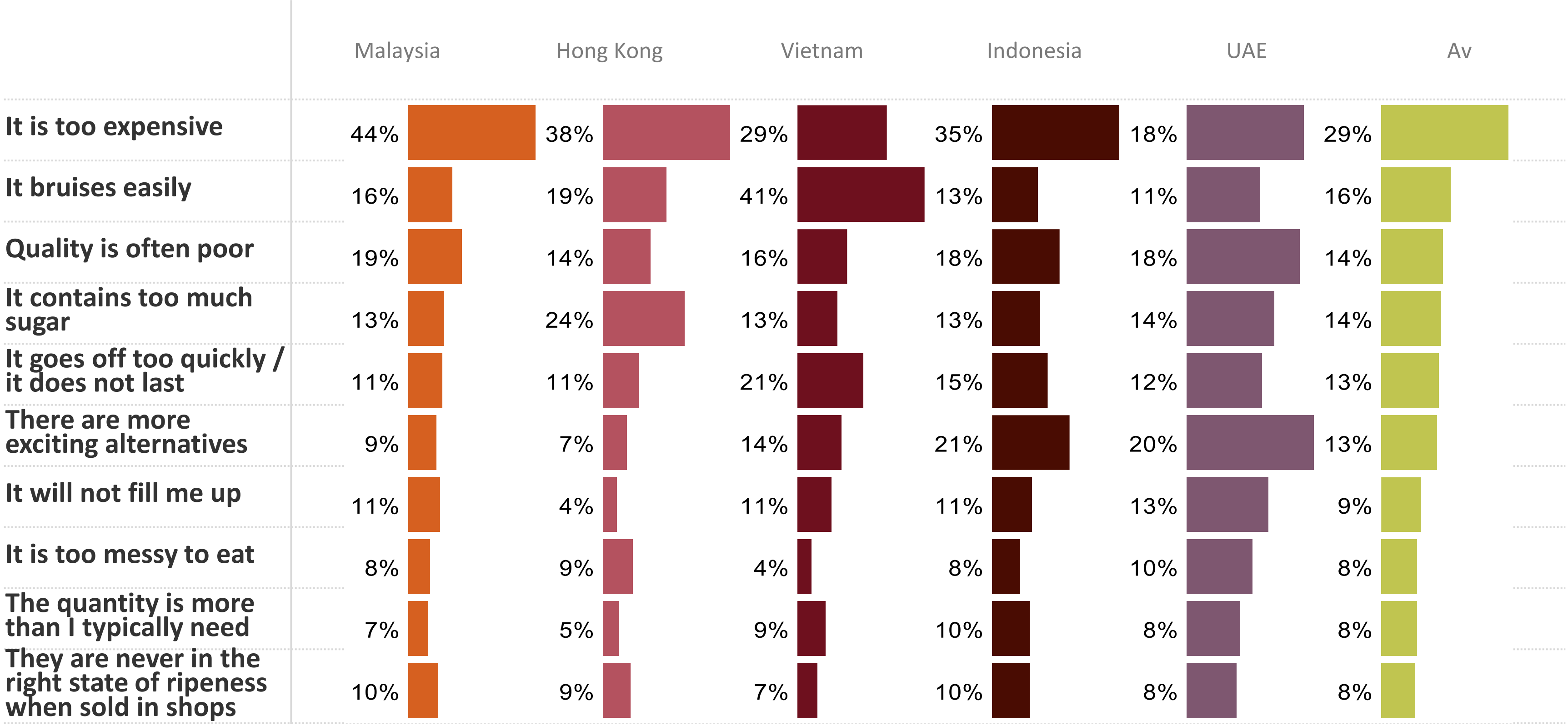
Leading Substitutes

Apples	Banana	Mango
40% (priority market average)	36% (priority market average)	32% (priority market average)

Too expensive is the biggest barrier across priority markets as well as bruises easily in Vietnam and more exciting alternatives in Indonesia and UAE

Table Grapes

What are the reasons you may not choose?



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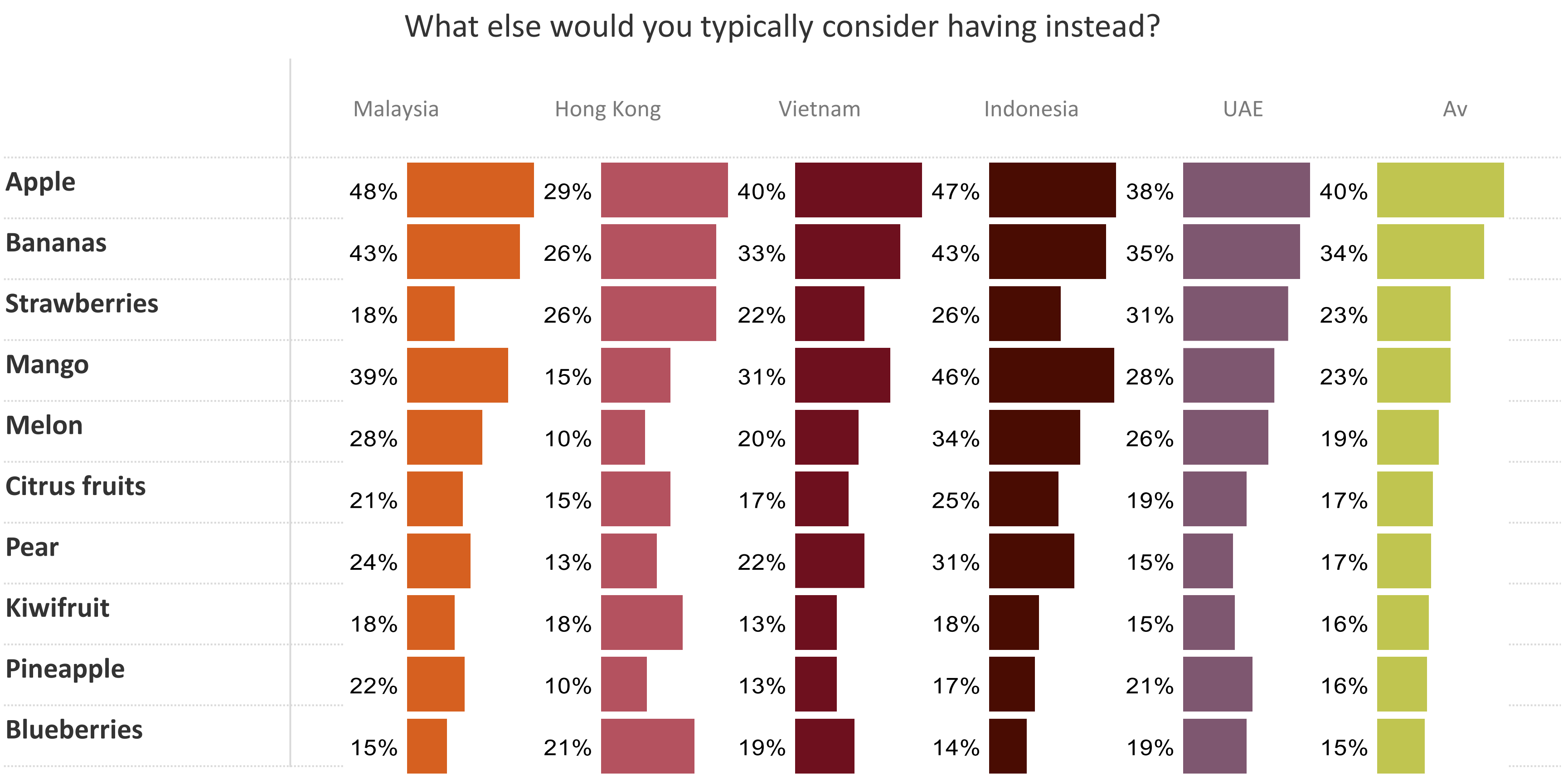
Hort Innovation

Apples and Bananas are key substitutes across priority markets we well as Mangos in Vietnam and Indonesia



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	292	300	295	296	300	299	296	221	294	294	287	306	40

Hort Innovation

Recommendation: How to drive growth in Australian Table Grapes

Table Grapes

1. Focus on Strategic Priority Markets

Focus on markets where **category penetration is high** and consumers are **willing to pay a premium** for quality Table Grapes (ie. **Vietnam, Hong Kong, Indonesia, UAE, and Malaysia**). Leverage already **high appeal for Australian Table Grapes in Vietnam, and improve appeal Hong Kong, Indonesia, UAE and Malaysia** to drive incremental growth in Australian Table Grape exports.

2. Deliver Core Consumer Needs

Deliver the core consumer needs across priority markets with Table Grapes that have a **refreshing taste, and are a quick & easy indulgence**. Ensure Table Grapes are at or above par for being **sweet, fresh and light, that serve as a refreshing snack or part of a lunch, dinner or dessert.**

3. Leverage Premium Advantage

Maximise the premium opportunity by delivering Table Grapes that are fresher, sweeter, have more flavour, and are free of pesticides.

4. Reduce Consumption Barriers

Address perceptions that Table Grapes are **too expensive, bruise easily, and are poor quality,** to minimise consumer drift to close substitutes like Apples, Bananas and Mangoes**.**

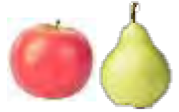
'Where to Play'

← ***'How to Win'*** →

4.

Appendix

The 11 fruit groups included in the study


Apple & Pear


Blueberries


Cherry


Citrus
(e.g. orange, lemon, lime, grapefruit)


Lychees


Mango


Melons


Raspberries & Blackberries


Strawberries


Summerfruit
(e.g. apricots, nectarines, peaches, plums)


Table Grapes

The 8 veg groups included in the study


Avocado


Olives/Olive Oil


Onion


Potatoes


Sweet Potato


Hard Veg
(e.g. carrots, sweet corn, pumpkin, cauliflower, cabbage, beetroot)


Fruiting Veg
(e.g. tomatoes, capsicum, cucumbers, zucchini, eggplant)


Leafy Veg
(e.g. salad greens, broccoli/broccolini, fresh herbs, lettuce, leafy Asian greens, spinach, silverbeet, kale

While avocados and olives are technically fruits, this report aims to provide a consumer lens and in the minds of consumers, these commodities are considered vegetables. The substitute set is vegetables, hence they are included here.

The 3 nut & dried fruit groups included in the study


Almond


Macadamia


Dried Grapes
(e.g. raisins, sultanas)

Data Considerations

Australian Data

While Australian data was not collected as a part of this export study, a previous study conducted by Kantar and Hort Innovation formed the foundation of this research and therefore Australian data has been included for comparison where available and relevant

Qatar Data

Data collection limitations meant in Qatar only a sample of N=500 was feasible.

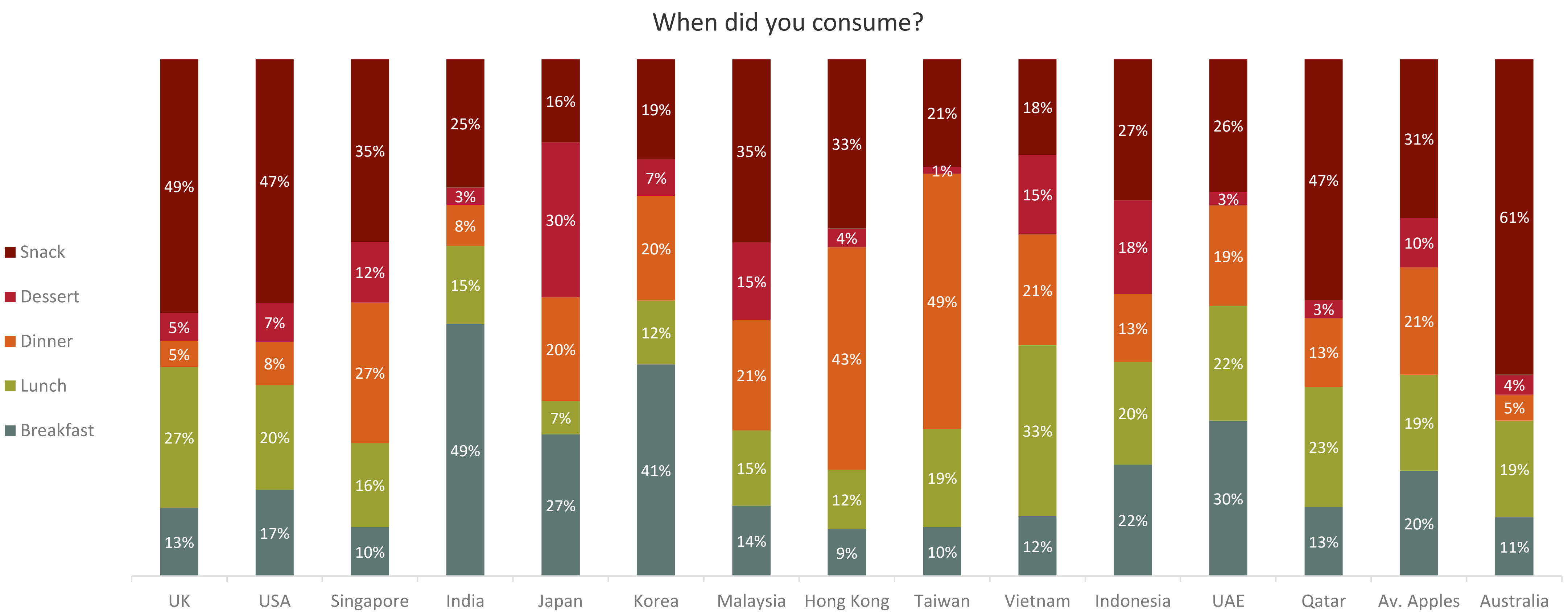
This results in low base sizes at a commodity level which should be taken into consideration when evaluating commodity level data from Qatar

Vietnam, India, Indonesia, UAE and Qatar Attractiveness Data

To account for issues of overclaim that are well documented in these markets the data used in evaluating attractiveness at a commodity level has been weighted down by a 1/3 to ensure accurate comparability with other markets.

4.1
Apples

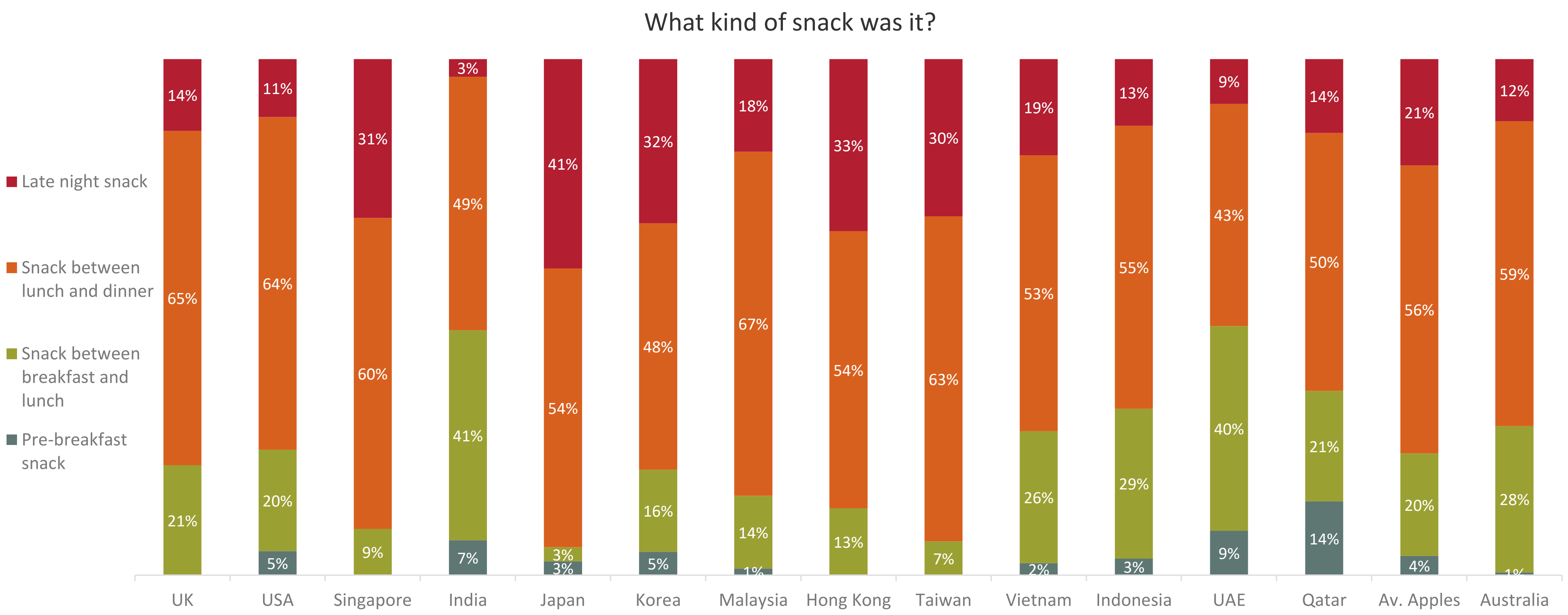
Apple



Source: Kantar HIA International Demand Study 2023

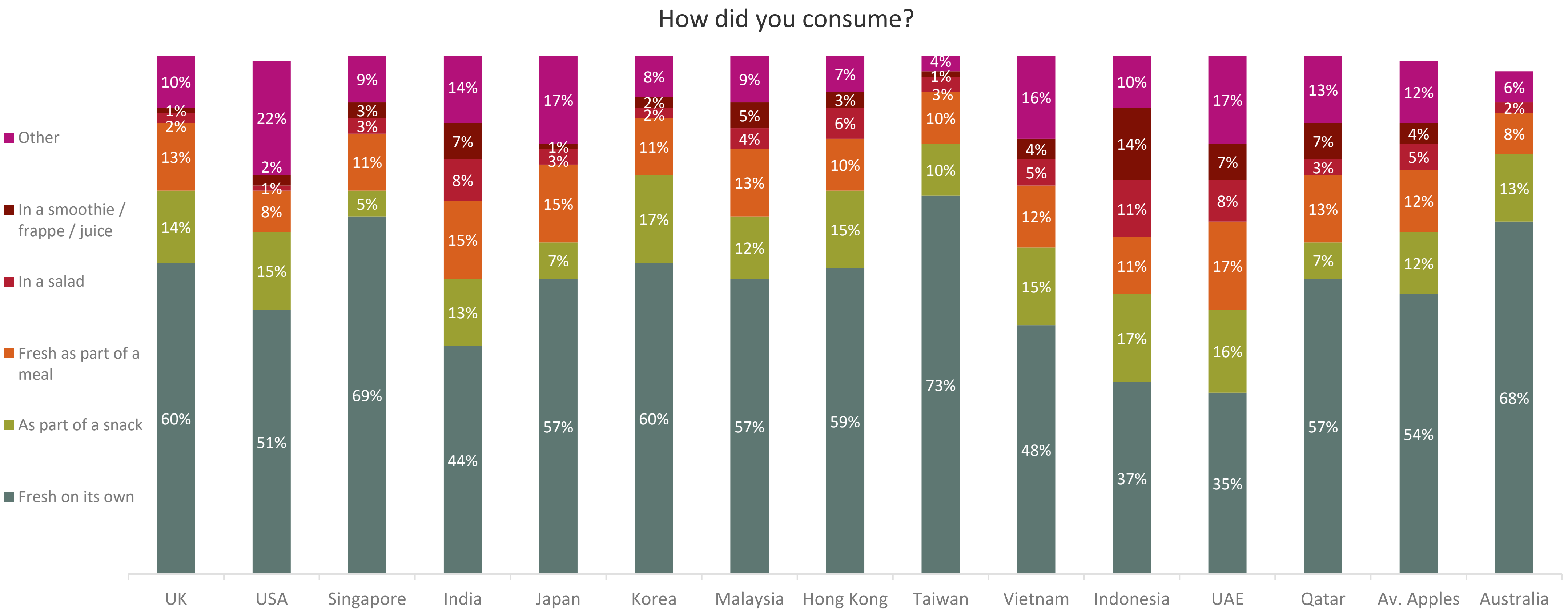
N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	220	227	221	238	230	227	220	165	221	233	227	226	30

Apple



Source: Kantar HIA International Demand Study 2023

Apple



'Other' = As an ingredient in baking, Cooked on its own, As a topping (e.g., on yoghurt, as a garnish etc.), As an ingredient in cooking, As part of an alcoholic drink e.g. cocktail, Don't know, To make baby food / puree, For decoration / show only and Don't Know

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	220	227	221	238	230	227	220	165	221	233	227	226	30

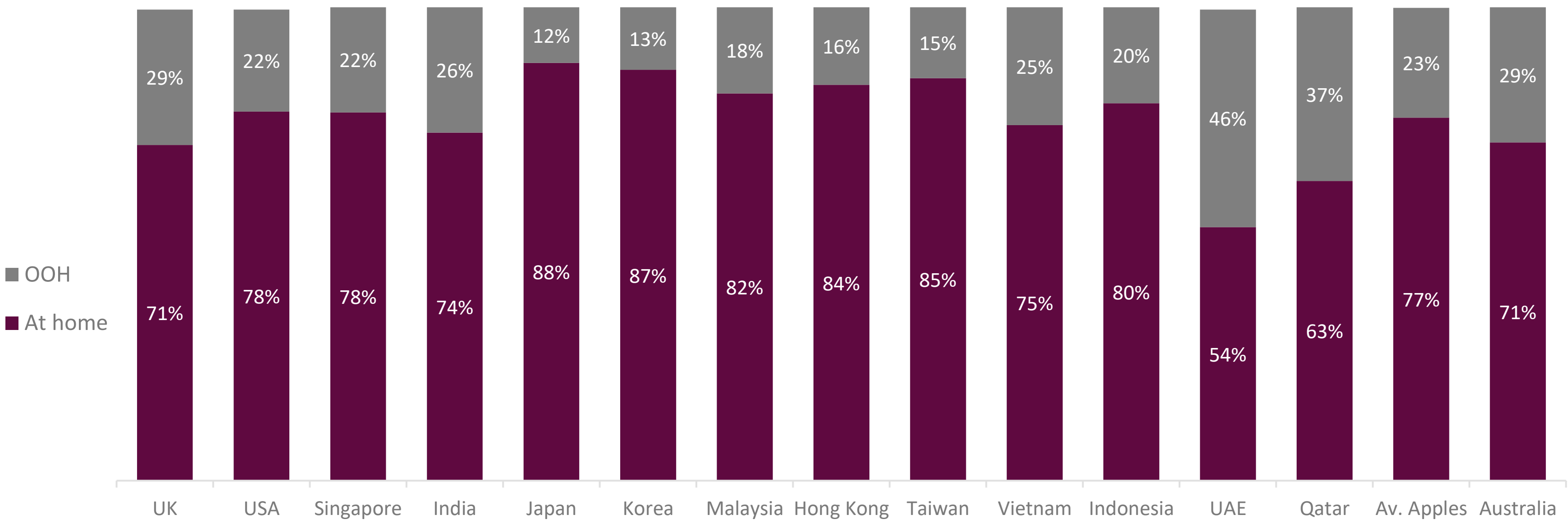
KANTAR

Hort Innovation

Where were you?

77%

of consumption of apples is in the home, this varies only slightly by market



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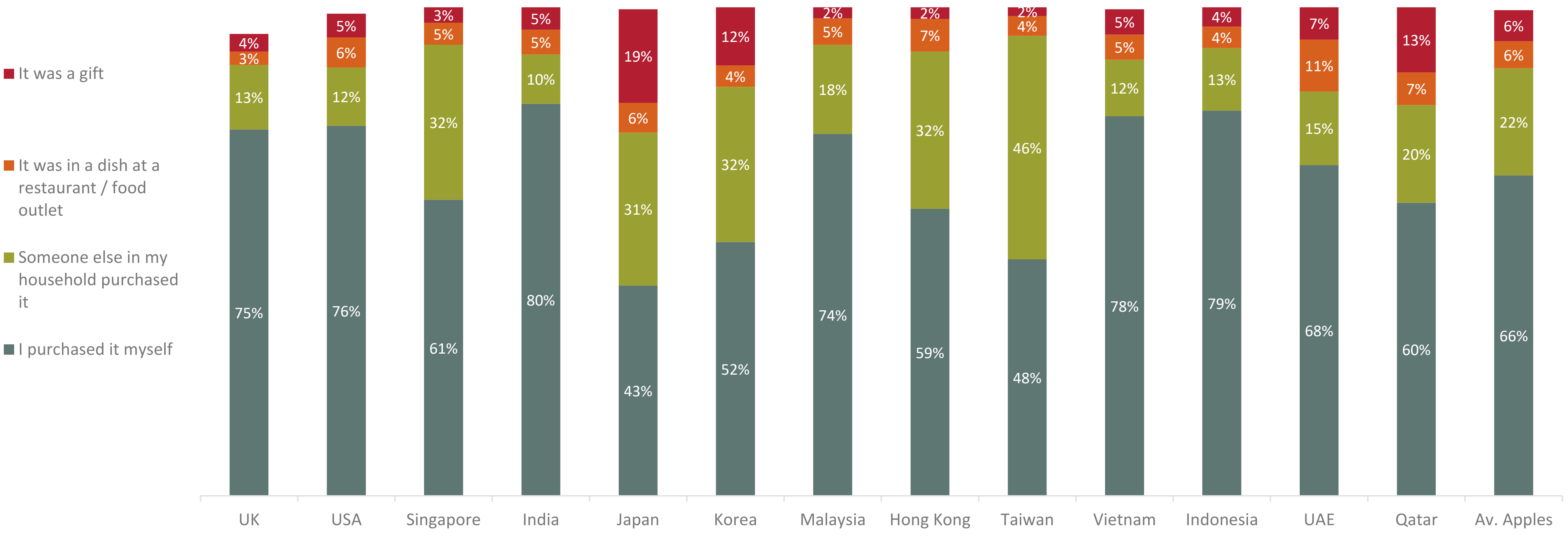
	220	227	221	238	230	227	220	165	221	233	227	226	30

Apple

Where did you get them from?

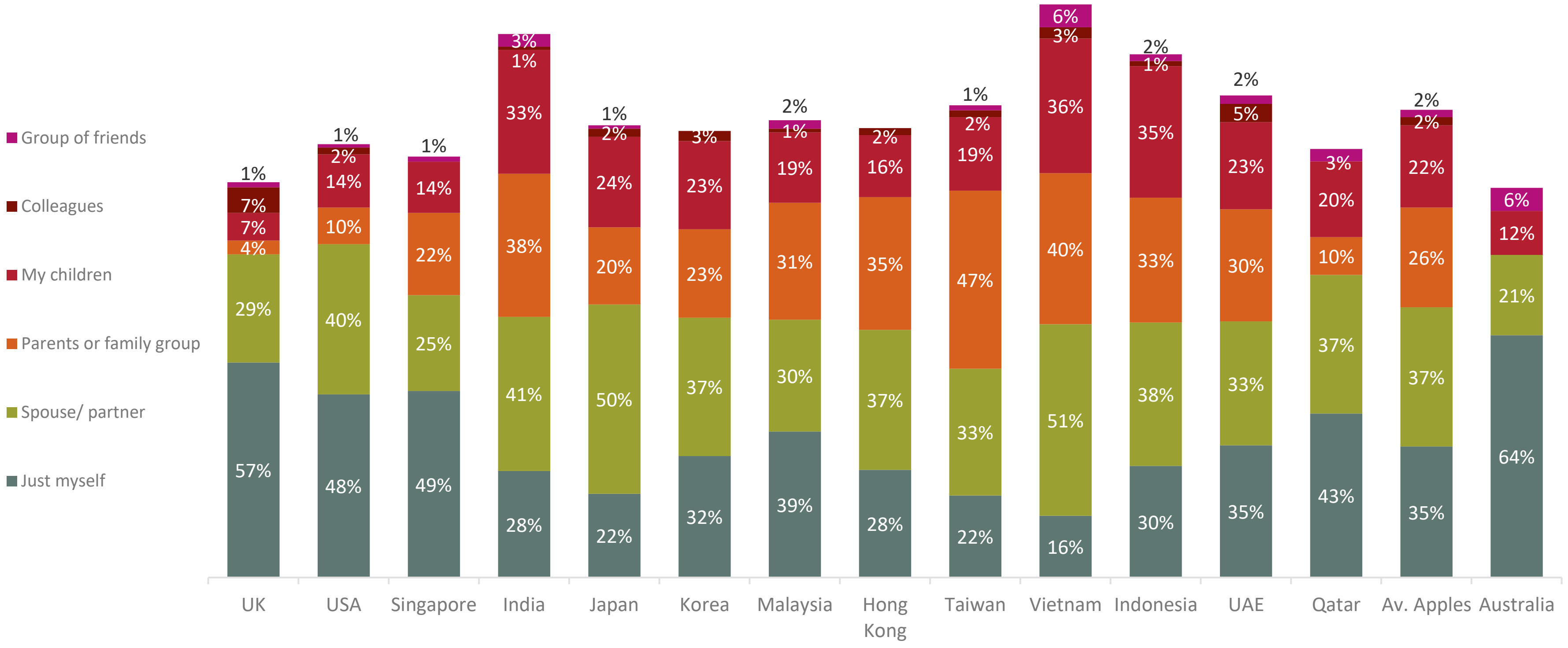


Apple

Who were you with?

37%

of consumption of apples (on average) is with a spouse/partner.



Apple

Which were important when choosing to consume?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av	Aus
Tasty	55%	57%	49%	61%	58%	55%	60%	57%	52%	63%	63%	46%	47%	56%	55%
Quick & Easy	63%	58%	56%	50%	44%	41%	62%	50%	57%	44%	51%	41%	30%	50%	68%
Healthy & Nutritious	24%	36%	38%	45%	20%	30%	46%	36%	40%	45%	51%	43%	37%	38%	40%
Indulgence	25%	38%	31%	37%	27%	26%	31%	22%	22%	45%	40%	36%	57%	34%	25%
Physical & Mental Energy	26%	33%	31%	50%	13%	33%	30%	27%	23%	36%	37%	44%	67%	35%	34%
Connection	8%	14%	16%	27%	13%	24%	16%	11%	19%	37%	30%	34%	20%	21%	6%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	220	227	221	238	230	227	220	165	221	233	227	226	30

Hort Innovation

Apple

Which were important when choosing to consume?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av	Aus
Really tasty	32%	37%	22%	28%	47%	34%	27%	29%	26%	36%	23%	24%	30%	30%	30%
Quick and easy	46%	41%	31%	29%	35%	20%	37%	31%	27%	27%	30%	18%	7%	29%	45%
Refreshing	29%	26%	29%	33%	17%	12%	40%	19%	12%	20%	40%	20%	13%	24%	33%
Has the nutrition my mind / body needs	14%	19%	26%	25%	12%	19%	29%	13%	15%	25%	27%	20%	17%	20%	22%
Everyone would eat	7%	10%	14%	22%	7%	22%	18%	25%	29%	24%	19%	14%	10%	17%	7%
To stop me feeling hungry	17%	19%	18%	22%	7%	19%	16%	15%	12%	11%	15%	19%	27%	17%	24%
To satisfy a craving	14%	25%	13%	20%	10%	8%	13%	8%	6%	17%	14%	18%	27%	15%	15%
Already available at home / work etc.	17%	15%	20%	12%	3%	13%	18%	14%	15%	12%	18%	12%	13%	14%	19%
To provide a quick energy boost	8%	11%	10%	21%	3%	12%	15%	7%	5%	18%	14%	15%	33%	13%	10%
Good for sharing	4%	8%	13%	12%	7%	19%	10%	5%	12%	19%	19%	18%	10%	12%	3%

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	220	227	221	238	230	227	220	165	221	233	227	226	30

Apple

What were you looking for when you consumed?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
Refreshing taste	31%	33%	25%	29%	35%	49%	35%	16%	11%	33%	27%	21%	13%	28%
Sweet	23%	27%	31%	24%	38%	38%	30%	20%	24%	20%	27%	18%	13%	26%
Fresh / Light	28%	24%	22%	29%	12%	26%	34%	24%	19%	16%	30%	23%	13%	23%
Contains fibre	12%	14%	17%	18%	13%	22%	18%	29%	29%	19%	24%	18%	17%	19%
Crunchy	27%	19%	33%	10%	34%	5%	32%	12%	11%	15%	8%	13%	3%	17%
Good source of minerals & vitamins / Nutritionally dense	11%	9%	15%	20%	10%	8%	18%	19%	20%	19%	30%	15%	10%	16%
Quick / easy to prepare	24%	22%	14%	11%	10%	3%	17%	19%	20%	9%	22%	12%	10%	15%
To aid digestion	5%	7%	18%	14%	5%	19%	17%	22%	28%	22%	11%	16%	10%	15%
Rich in anti-oxidants	5%	6%	11%	19%	4%	10%	13%	8%	14%	21%	21%	10%	20%	12%
Filling	16%	16%	10%	13%	6%	13%	11%	11%	17%	4%	11%	13%	10%	12%

Apple

What are the reasons you may not choose?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
It is too expensive	11%	13%	18%	22%	23%	16%	24%	28%	32%	24%	24%	12%	23%	21%
There are more exciting alternatives	21%	19%	19%	21%	9%	25%	22%	13%	12%	19%	22%	13%	17%	18%
It bruises easily	12%	10%	19%	12%	7%	15%	19%	25%	21%	33%	17%	13%	17%	17%
Quality is often poor	8%	11%	14%	16%	3%	11%	20%	12%	15%	21%	19%	12%	10%	13%
It will not fill me up	16%	14%	10%	11%	4%	4%	10%	4%	7%	9%	9%	15%	10%	10%
It goes off too quickly / it does not last	10%	6%	6%	12%	6%	4%	9%	7%	5%	17%	14%	14%	13%	9%
The quantity is more than I typically need	5%	6%	9%	10%	8%	6%	7%	5%	12%	12%	11%	12%	10%	9%
It contains too much sugar	3%	6%	10%	13%	4%	8%	7%	10%	10%	12%	6%	9%	7%	8%
It is too messy to eat	2%	5%	5%	12%	17%	3%	5%	13%	13%	6%	6%	9%	7%	8%
Not enough people in my household like it/them	5%	7%	10%	8%	2%	9%	8%	6%	5%	9%	9%	10%	10%	8%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	220	227	221	238	230	227	220	165	221	233	227	226	30

Hort Innovation

Apple

What else would you typically consider having instead?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
Bananas	47%	39%	42%	53%	30%	34%	49%	32%	49%	34%	49%	37%	37%	41%
Pear	22%	13%	26%	23%	11%	22%	30%	30%	28%	27%	33%	19%	10%	22%
Mango	7%	11%	29%	32%	3%	6%	37%	12%	17%	30%	50%	25%	30%	22%
Melon	13%	18%	20%	19%	5%	6%	32%	7%	9%	20%	37%	16%	40%	18%
Strawberries	24%	21%	7%	10%	17%	21%	15%	18%	13%	18%	16%	26%	23%	18%
Citrus fruits (orange, lemon, lime, grapefruit)	17%	14%	11%	19%	12%	19%	19%	21%	23%	18%	15%	17%	10%	17%
Papaya	0%	0%	27%	35%	2%	1%	27%	6%	25%	17%	38%	16%	10%	16%
Table Grapes	23%	22%	0%	0%	6%	9%	13%	18%	19%	26%	12%	27%	27%	15%
Guava	0%	0%	18%	39%	0%	1%	23%	7%	46%	24%	13%	19%	3%	15%
Kiwifruit	8%	7%	16%	21%	16%	6%	15%	20%	28%	18%	9%	12%	3%	14%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	220	227	221	238	230	227	220	165	221	233	227	226	30

Hort Innovation

Apple

What does premium quality mean to you?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
Fresher	41%	42%	44%	48%	20%	38%	51%	44%	37%	48%	48%	41%	43%	42%
Sweeter	27%	25%	43%	32%	32%	34%	29%	41%	37%	28%	32%	23%	23%	31%
Organic / free from pesticides	19%	18%	26%	36%	14%	24%	31%	21%	24%	34%	35%	24%	23%	25%
More flavour	37%	26%	20%	23%	24%	23%	13%	40%	10%	27%	24%	26%	27%	25%
Right state of ripeness	29%	33%	23%	27%	8%	17%	22%	18%	25%	25%	28%	19%	7%	22%
Higher in vitamins and minerals	10%	14%	24%	36%	7%	15%	27%	13%	19%	34%	35%	24%	17%	21%
I trust its safety	10%	14%	14%	34%	20%	17%	20%	18%	16%	22%	25%	32%	23%	20%
More appetizing (e.g. not bruised, damaged)	20%	19%	15%	15%	10%	19%	25%	14%	19%	38%	21%	17%	13%	19%
Lasts longer	15%	13%	11%	26%	4%	7%	19%	11%	7%	21%	21%	18%	10%	14%
Locally grown / produced in my area	20%	21%	7%	13%	24%	19%	6%	5%	8%	13%	16%	14%	10%	14%

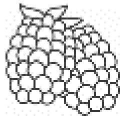
KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	220	227	221	238	230	227	220	165	221	233	227	226	30

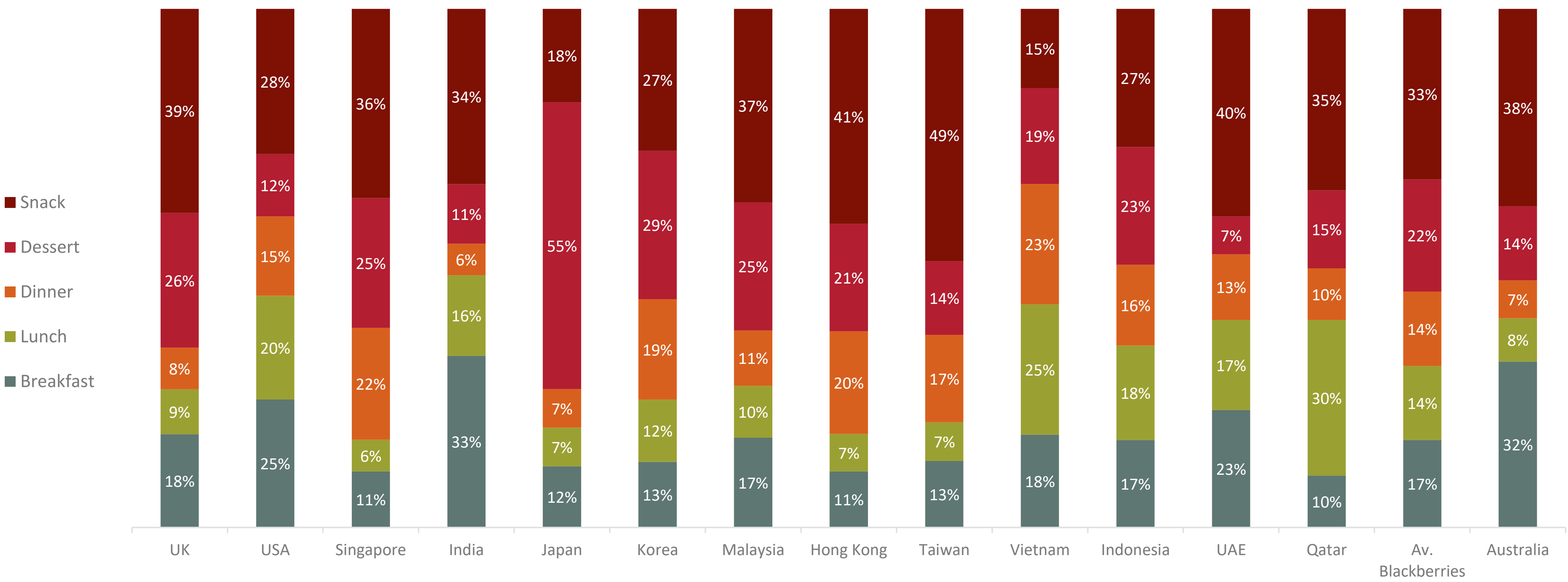
4.2

Blackberries



Blackberries

When did you consume?



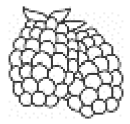
KANTAR

Source: Kantar HIA International Demand Study 2023

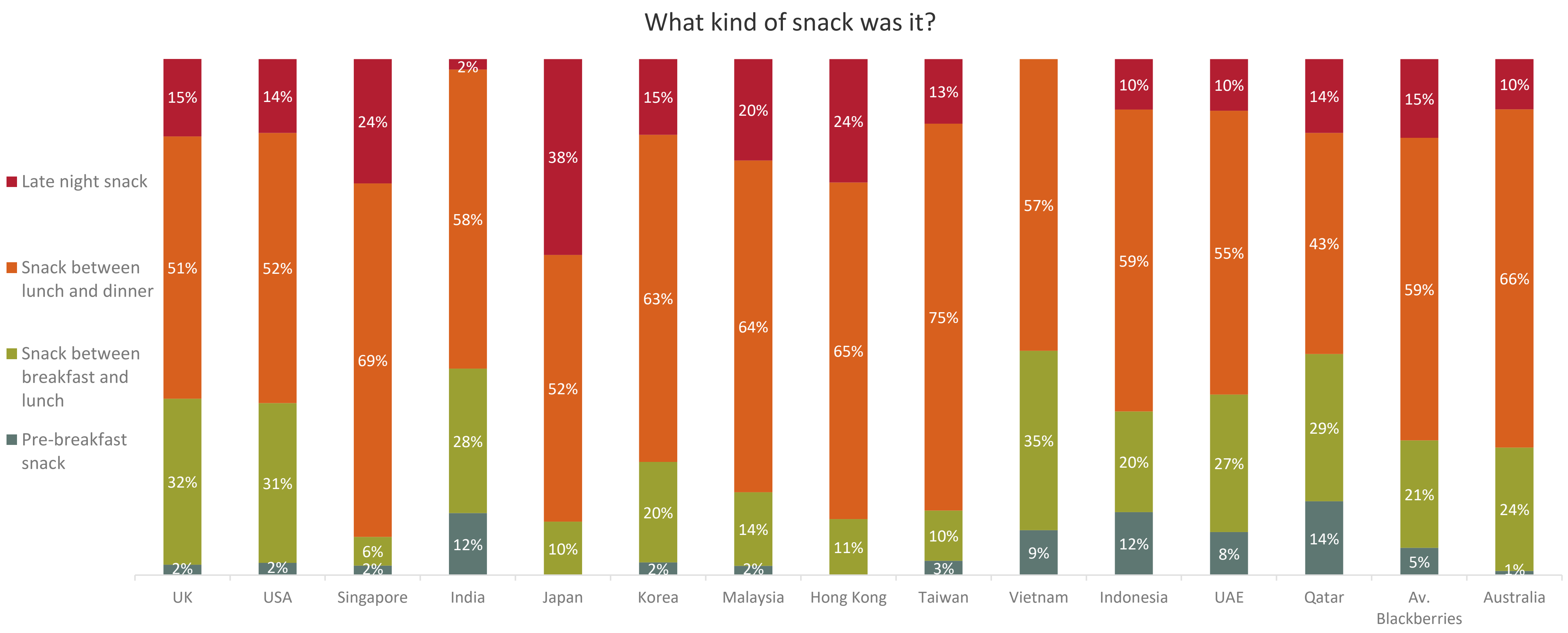
N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	150	150	148	148	161	150	150	111	148	151	154	150	20*

*Caution: Low Base

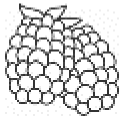
Hort Innovation



Blackberries

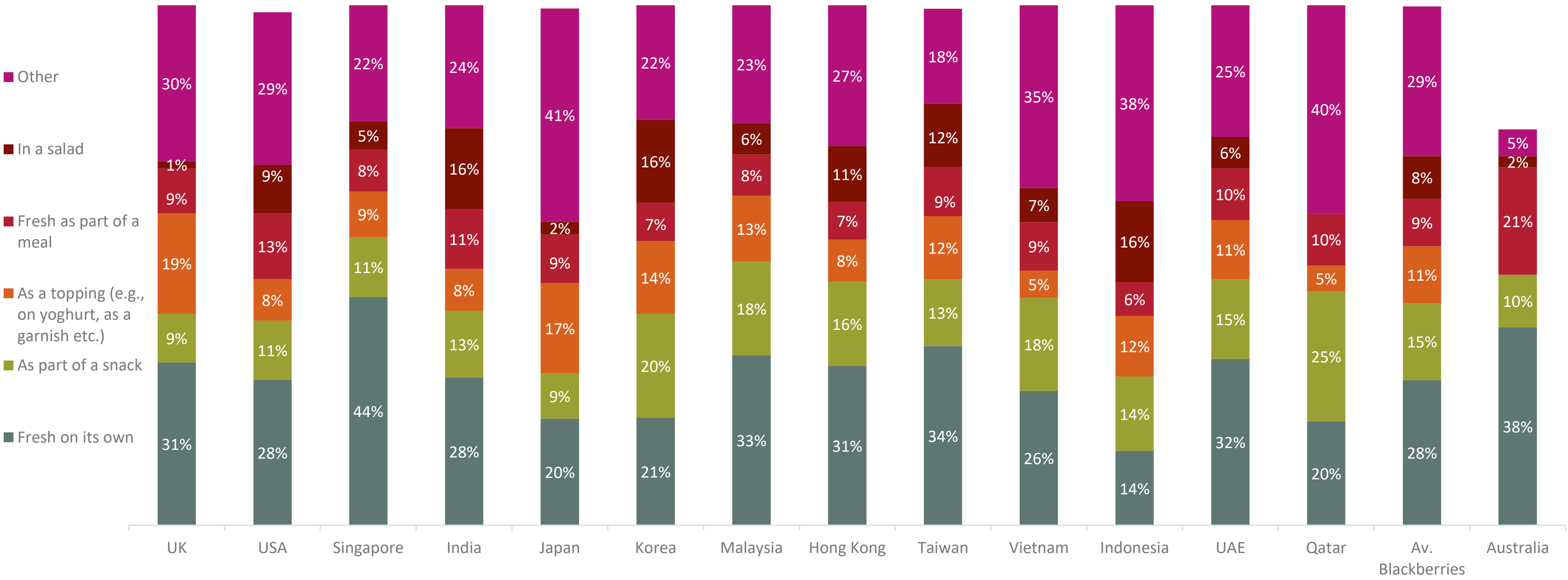


Source: Kantar HIA International Demand Study 2023



Blackberries

How did you consume?

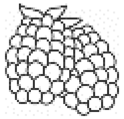


'Other' = In a smoothie / frappe / juice, As an ingredient in baking, Cooked on its own, As an ingredient in cooking, For decoration / show only, As part of an alcoholic drink e.g. cocktail and To make baby food / puree and Don't Know

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	150	150	148	148	161	150	150	111	148	151	154	150	20*

*Caution: Low Base

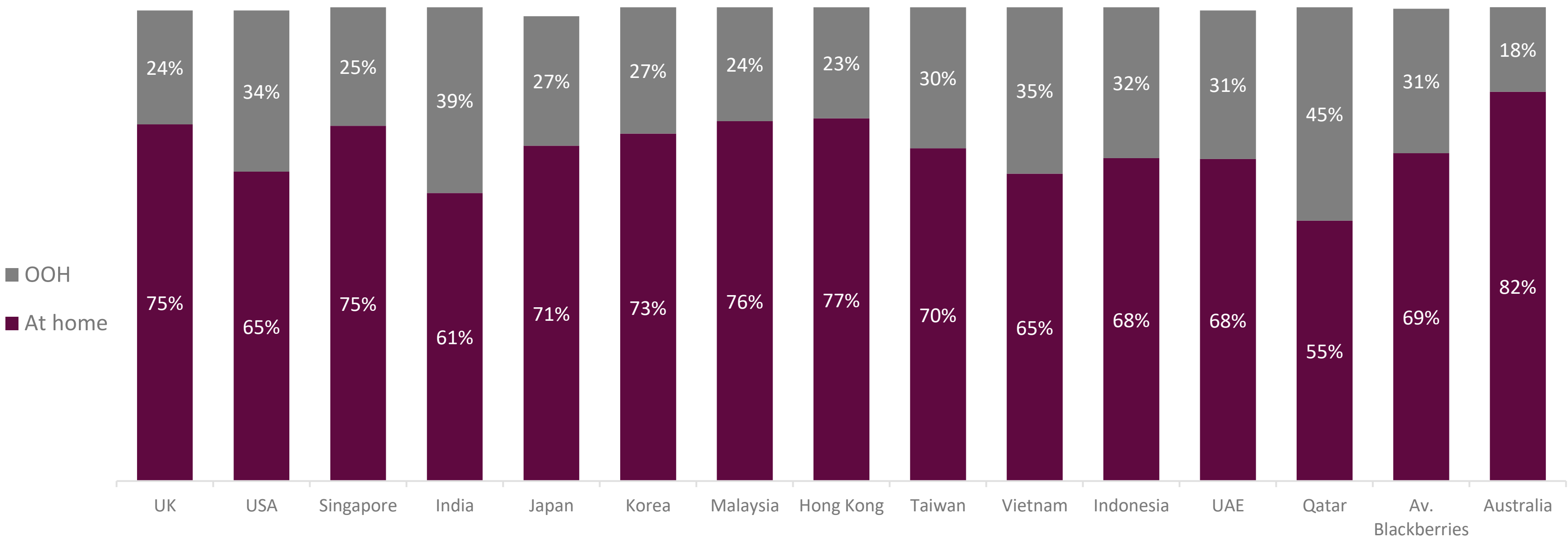


Blackberries

Where were you?

69%

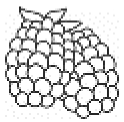
Of consumption of blackberries is in the home, this varies only slightly by market



Source: Kantar HIA International Demand Study 2023

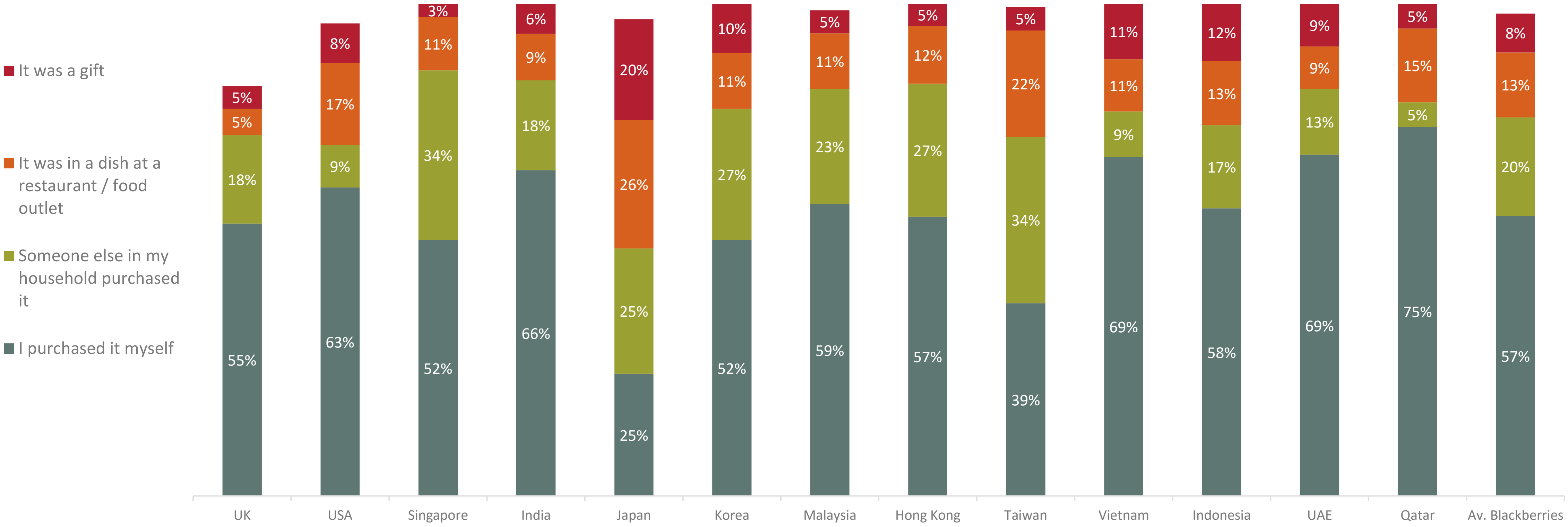
N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	150	150	148	148	161	150	150	111	148	151	154	150	20*

*Caution: Low Base



Blackberries

Where did you get them from?



KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	150	150	148	148	161	150	150	111	148	151	154	150	20*

*Caution: Low Base

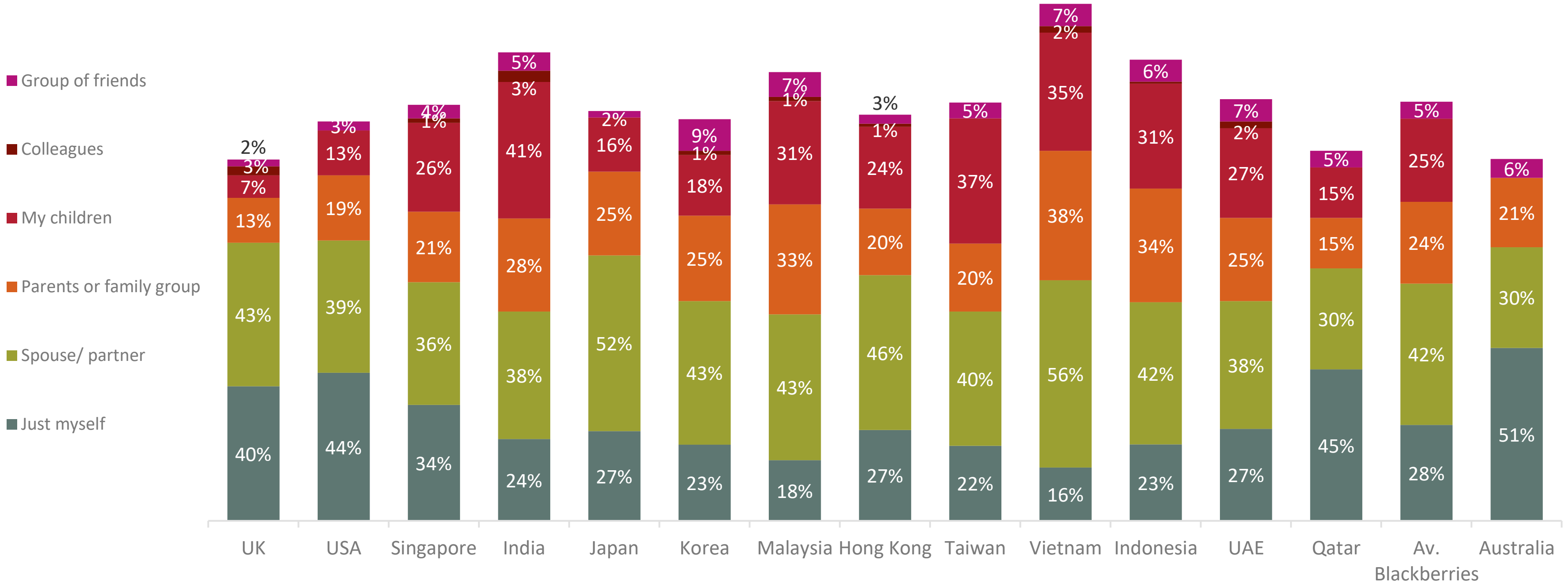
Hort Innovation

Blackberries

Who were you with?

42%

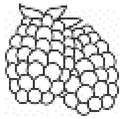
Of consumption of blackberries (on average) is with a spouse/partner.



Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	150	150	148	148	161	150	150	111	148	151	154	150	20*

*Caution: Low Base



Blackberries

Which were important when choosing to consume?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av	Aus
Tasty	61%	59%	47%	62%	45%	52%	61%	52%	49%	52%	57%	61%	45%	54%	71%
Quick & Easy	48%	52%	49%	49%	27%	36%	50%	43%	46%	30%	40%	43%	25%	41%	63%
Healthy & Nutritious	25%	33%	33%	39%	14%	29%	35%	36%	35%	37%	49%	37%	65%	36%	42%
Indulgence	28%	37%	36%	39%	18%	20%	40%	30%	35%	48%	42%	41%	30%	34%	26%
Physical & Mental Energy	25%	25%	26%	29%	13%	23%	26%	20%	20%	31%	28%	28%	35%	25%	27%
Connection	18%	30%	22%	49%	26%	29%	42%	32%	30%	44%	46%	37%	20%	33%	17%

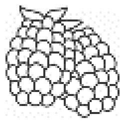
KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	150	150	148	148	161	150	150	111	148	151	154	150	20*

*Caution: Low Base

Hort Innovation



Blackberries

Which were important when choosing to consume?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av	Aus
Really tasty	44%	42%	20%	35%	36%	19%	34%	31%	30%	26%	31%	33%	15%	30%	53%
Refreshing	27%	23%	22%	36%	12%	21%	32%	21%	11%	18%	33%	33%	30%	25%	33%
Quick and easy	30%	31%	28%	24%	18%	19%	35%	16%	20%	15%	22%	24%	20%	23%	42%
Has the nutrition my mind / body needs	12%	17%	18%	19%	6%	14%	23%	18%	13%	15%	25%	17%	35%	18%	24%
Good for sharing	8%	14%	14%	20%	4%	15%	30%	12%	17%	20%	18%	16%	5%	15%	6%
Everyone would eat	13%	10%	19%	16%	2%	23%	16%	17%	11%	23%	12%	15%	10%	14%	14%
To satisfy a craving	7%	19%	18%	18%	2%	3%	21%	8%	7%	17%	14%	13%	25%	13%	11%
That helped me relax / unwind	3%	7%	9%	12%	11%	13%	7%	14%	14%	17%	19%	11%	15%	12%	5%
To meet certain macro / nutritional goals	5%	5%	7%	9%	2%	5%	10%	12%	16%	13%	14%	11%	30%	11%	9%
To help manage my weight	10%	8%	14%	11%	4%	11%	5%	16%	5%	14%	16%	13%	10%	11%	13%

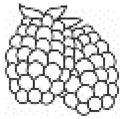
KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	150	150	148	148	161	150	150	111	148	151	154	150	20*

*Caution: Low Base

Hort Innovation



Blackberries

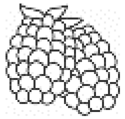
What were you looking for when you consumed?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
Refreshing taste	33%	24%	24%	31%	28%	33%	37%	22%	8%	28%	30%	29%	30%	27%
Sweet	33%	25%	25%	18%	27%	23%	27%	27%	19%	14%	21%	24%	10%	23%
Fresh / Light	28%	19%	23%	27%	11%	26%	29%	20%	17%	17%	25%	15%	25%	22%
Rich in anti-oxidants	15%	15%	20%	23%	7%	17%	29%	13%	23%	17%	25%	16%	20%	19%
Good source of minerals & vitamins / Nutritionally dense	12%	12%	17%	16%	14%	7%	17%	9%	20%	11%	18%	19%	15%	14%
Quick / easy to prepare	21%	23%	16%	9%	4%	6%	15%	14%	11%	11%	12%	9%	10%	13%
Low in calories	14%	19%	15%	13%	4%	11%	12%	13%	16%	10%	16%	10%	5%	12%
Contains fibre	9%	6%	11%	14%	6%	11%	12%	14%	20%	9%	19%	11%	15%	12%
To aid digestion	2%	5%	11%	9%	4%	13%	9%	16%	18%	17%	14%	18%	10%	11%
Fun / exciting	8%	7%	5%	18%	12%	5%	7%	5%	7%	15%	12%	12%	15%	10%

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	150	150	148	148	161	150	150	111	148	151	154	150	20*

*Caution: Low Base



Blackberries

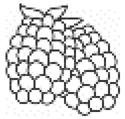
What are the reasons you may not choose?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
It is too expensive	28%	31%	50%	26%	25%	29%	52%	38%	43%	28%	32%	35%	25%	34%
It bruises easily	8%	13%	11%	14%	9%	3%	11%	24%	12%	31%	13%	17%	35%	16%
It goes off too quickly / it does not last	20%	9%	11%	16%	7%	9%	11%	11%	12%	13%	12%	15%	20%	13%
There are more exciting alternatives	8%	13%	11%	18%	16%	12%	14%	5%	10%	12%	19%	13%	5%	12%
Quality is often poor	7%	10%	13%	9%	3%	5%	13%	11%	12%	17%	8%	14%	15%	10%
Not enough people in my household like it/them	14%	9%	14%	15%	4%	11%	12%	13%	6%	7%	16%	8%	5%	10%
It will not fill me up	4%	9%	12%	12%	6%	11%	7%	6%	10%	11%	11%	13%	15%	10%
They are never in the right state of ripeness when sold in shops	4%	9%	11%	16%	4%	5%	11%	5%	7%	5%	13%	7%	5%	8%
I don't really know what to do with it	3%	6%	4%	7%	12%	8%	5%	6%	6%	9%	10%	7%	10%	7%
It is too messy to eat	10%	5%	6%	11%	7%	9%	3%	11%	9%	7%	8%	6%	0%	7%

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	150	150	148	148	161	150	150	111	148	151	154	150	20*

*Caution: Low Base



Blackberries

What else would you typically consider having instead?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
Blueberries	22%	30%	31%	26%	22%	29%	23%	30%	39%	25%	13%	20%	35%	26%
Strawberries	39%	33%	10%	10%	26%	15%	30%	29%	21%	20%	25%	31%	50%	26%
Bananas	25%	29%	32%	39%	12%	13%	36%	17%	16%	21%	34%	31%	30%	26%
Apple	25%	24%	29%	40%	16%	22%	36%	15%	18%	29%	24%	24%	30%	26%
Mango	11%	15%	28%	28%	3%	7%	35%	15%	11%	16%	29%	25%	30%	20%
Kiwifruit	9%	8%	20%	28%	11%	6%	20%	10%	21%	15%	12%	16%	20%	15%
Cherries	15%	16%	16%	20%	5%	9%	12%	21%	22%	11%	10%	21%	15%	15%
Melon	13%	15%	20%	20%	4%	4%	23%	13%	3%	13%	22%	19%	20%	15%
Pineapple	9%	15%	9%	23%	9%	5%	20%	9%	14%	9%	12%	23%	25%	14%
Table Grapes	19%	9%	0%	0%	7%	15%	13%	21%	14%	23%	14%	24%	20%	14%

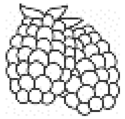
KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	150	150	148	148	161	150	150	111	148	151	154	150	20*

*Caution: Low Base

Hort Innovation



Blackberries

What does premium quality mean to you?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
Fresher	35%	37%	34%	37%	12%	26%	40%	40%	33%	33%	32%	44%	55%	35%
Sweeter	21%	21%	35%	23%	19%	17%	31%	32%	15%	19%	24%	19%	15%	22%
Organic / free from pesticides	14%	14%	22%	30%	15%	24%	25%	21%	26%	23%	36%	27%	15%	22%
Higher in vitamins and minerals	14%	11%	22%	26%	18%	21%	31%	23%	28%	25%	33%	22%	15%	22%
More flavour	25%	20%	16%	24%	19%	17%	17%	31%	16%	27%	19%	19%	30%	21%
Right state of ripeness	30%	25%	27%	20%	5%	9%	25%	20%	15%	30%	19%	23%	25%	21%
I trust its safety	13%	20%	11%	30%	10%	15%	17%	17%	17%	17%	27%	26%	20%	19%
More appetizing (e.g. not bruised, damaged)	15%	16%	19%	11%	6%	8%	16%	10%	12%	24%	19%	13%	25%	15%
Lasts longer	21%	19%	17%	19%	3%	4%	15%	6%	9%	19%	21%	13%	15%	14%
Premium packaging	7%	11%	13%	22%	8%	13%	15%	11%	8%	15%	29%	19%	5%	14%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	150	150	148	148	161	150	150	111	148	151	154	150	20*

*Caution: Low Base

Hort Innovation

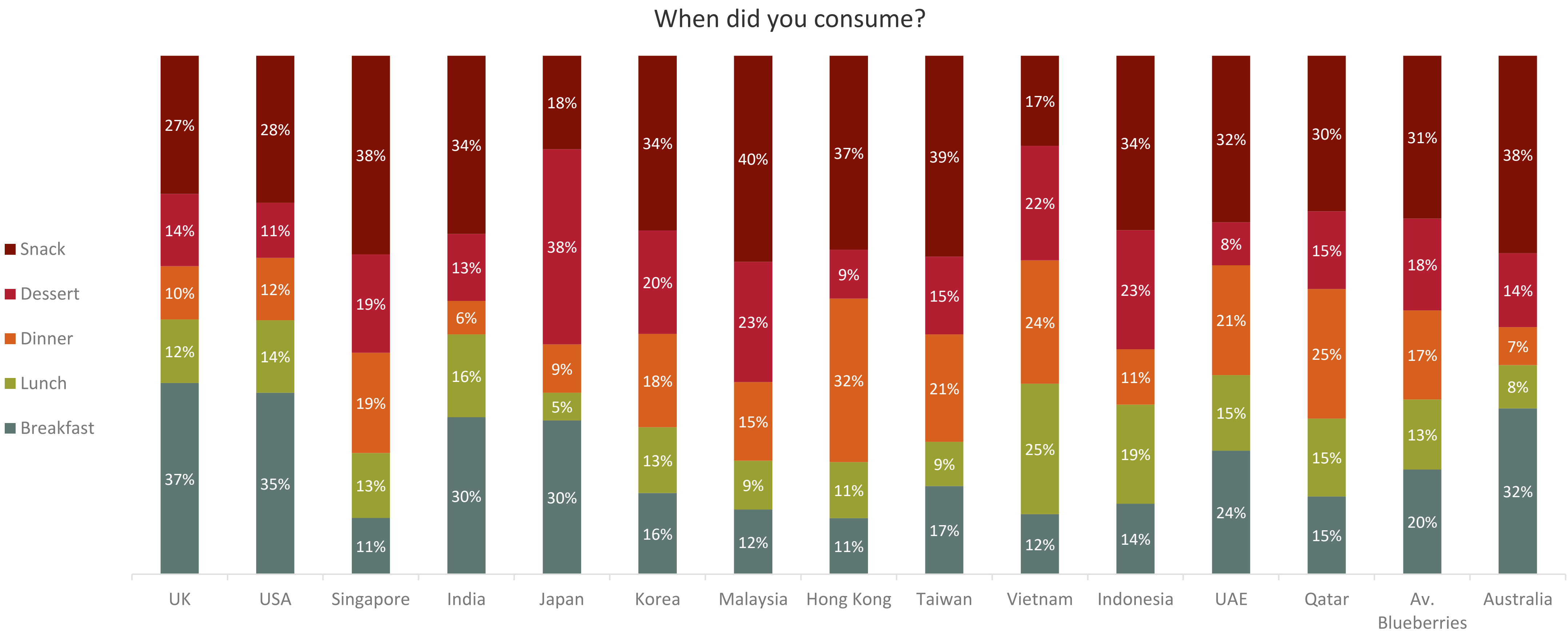
KANTAR

4.3

Blueberries

Hort Innovation

Blueberries

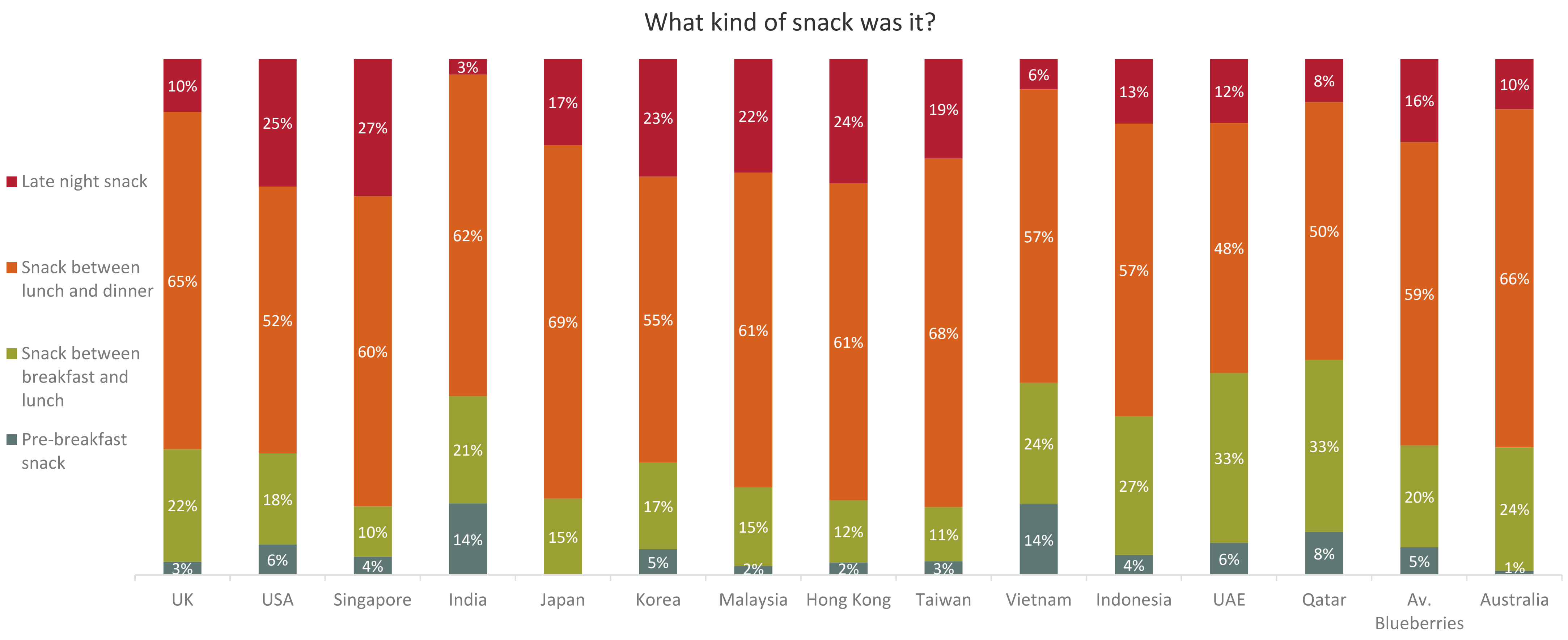


	Snack	Dessert	Dinner	Lunch	Breakfast
UK	27%	14%	10%	12%	37%
USA	28%	11%	12%	14%	35%
Singapore	38%	19%	19%	13%	11%
India	34%	13%	6%	16%	30%
Japan	18%	38%	9%	5%	30%
Korea	34%	20%	18%	13%	16%
Malaysia	40%	23%	15%	9%	12%
Hong Kong	37%	9%	32%	11%	11%
Taiwan	39%	15%	21%	9%	17%
Vietnam	17%	22%	24%	25%	12%
Indonesia	34%	23%	11%	19%	14%
UAE	32%	8%	21%	15%	24%
Qatar	30%	15%	25%	15%	15%
Av. Blueberries	31%	18%	17%	13%	20%
Australia	38%	14%	7%	8%	32%

Source: Kantar HIA International Demand Study 2023

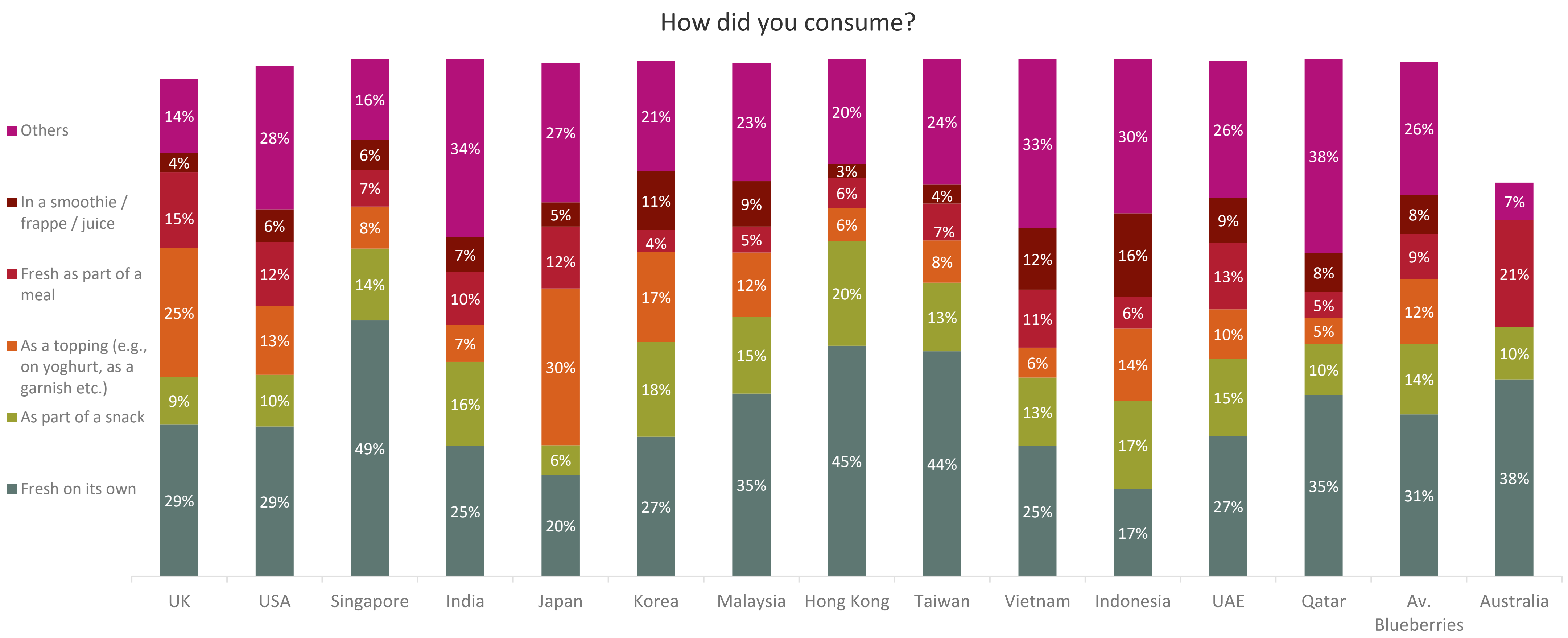
N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	295	294	300	300	297	222	294	294	309	302	40

Blueberries



Source: Kantar HIA International Demand Study 2023

Blueberries



'Other' = In a salad, As an ingredient in baking, As an ingredient in cooking, Cooked on its own, To make baby food / puree, For decoration / show only, As part of an alcoholic drink e.g. cocktail and Don't know

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	295	294	300	300	297	222	294	294	309	302	40

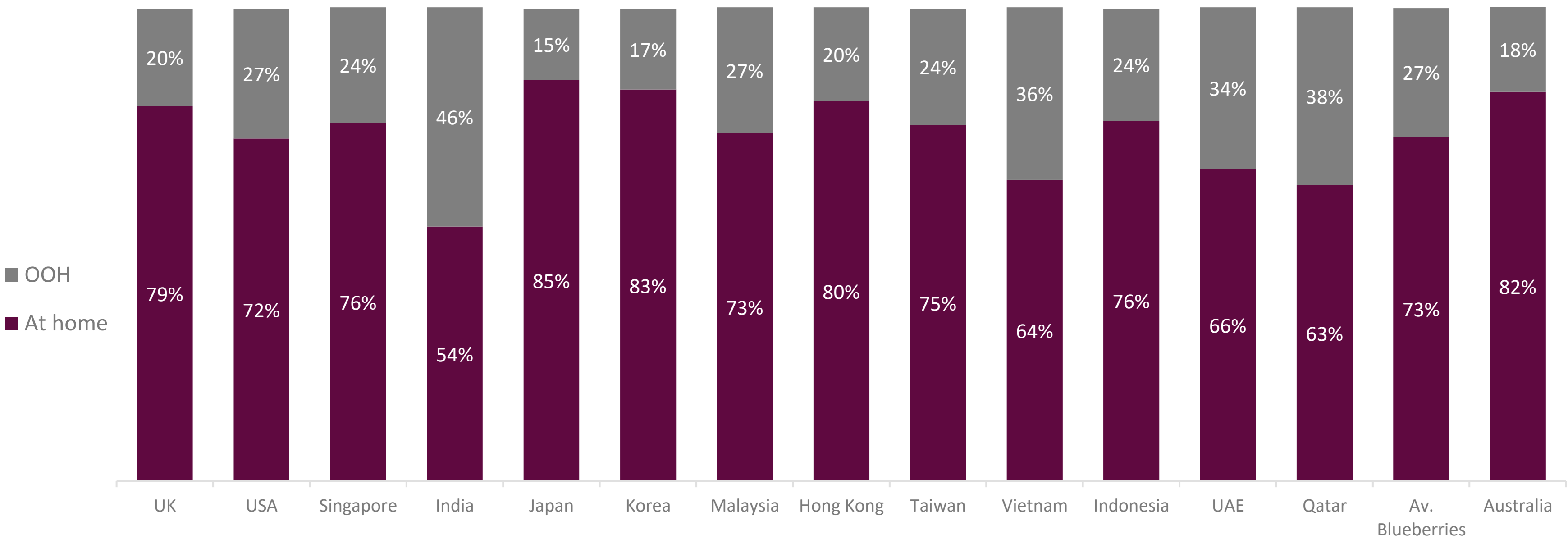
KANTAR

Hort Innovation

Where were you?

73%

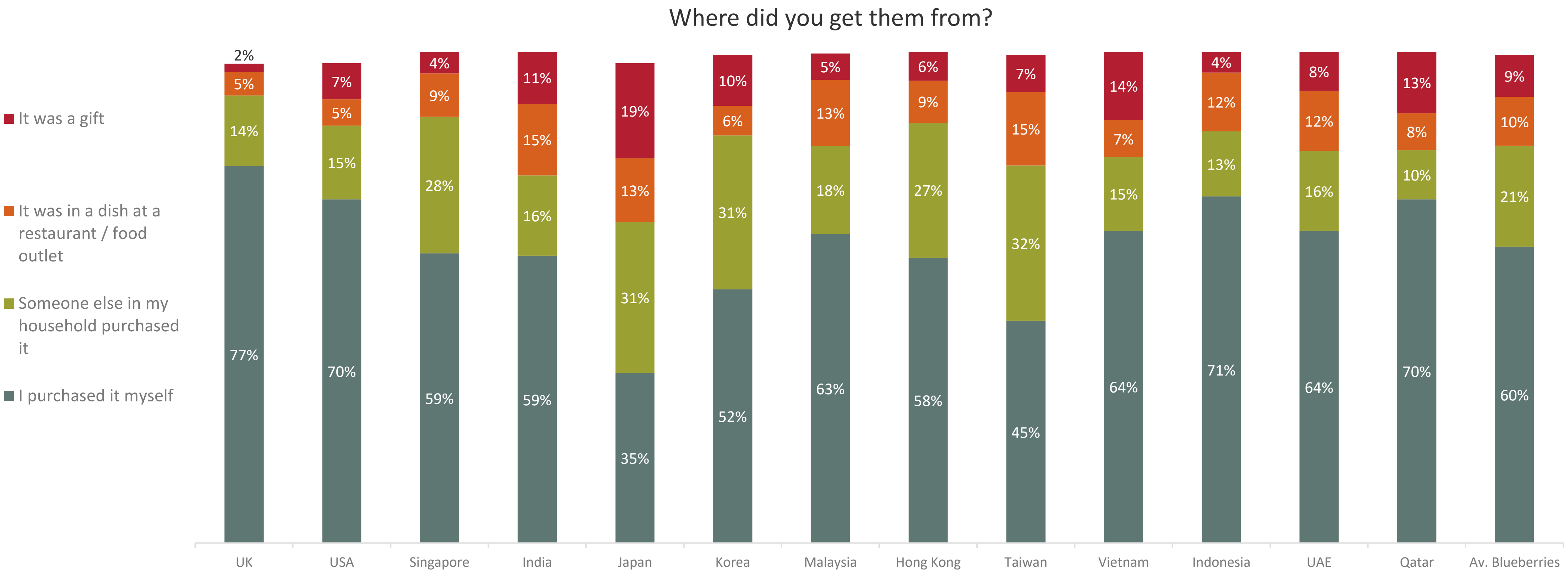
Of consumption of blueberries is in the home, this varies only slightly by market



Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	295	294	300	300	297	222	294	294	309	302	40

Blueberries



Source: Kantar HIA International Demand Study 2023

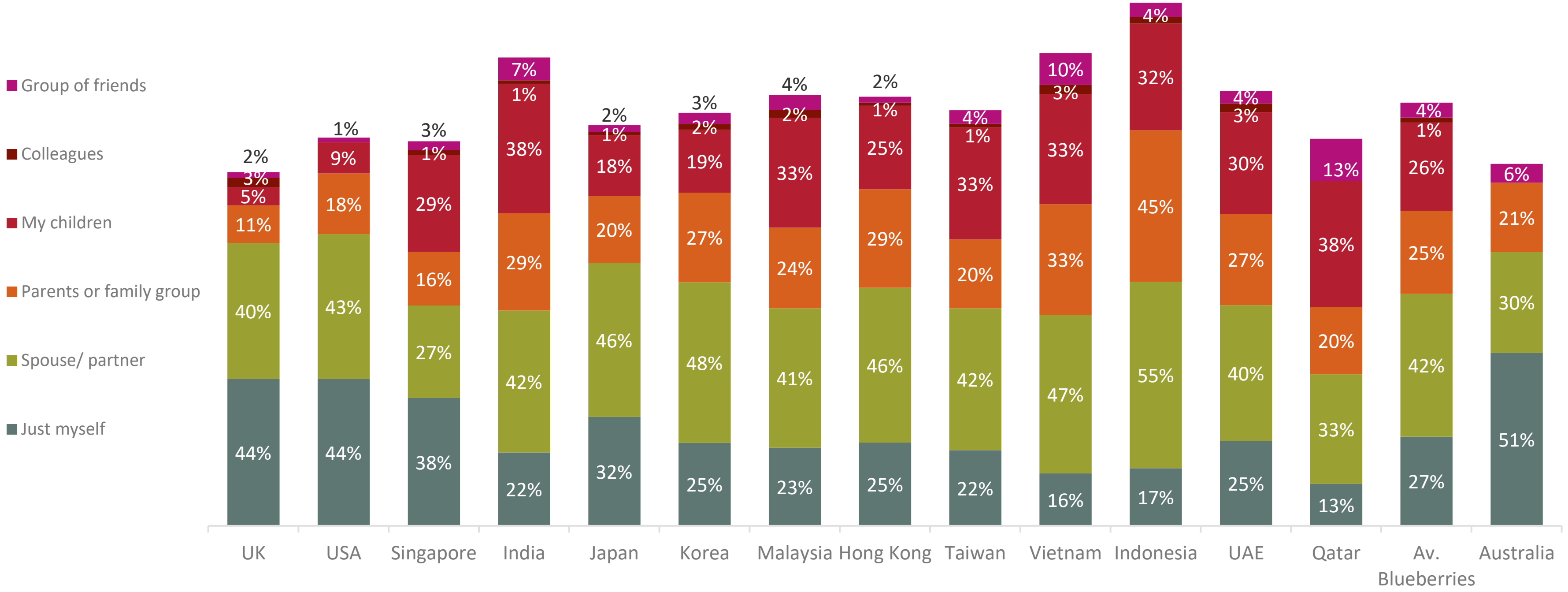
N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	295	294	300	300	297	222	294	294	309	302	40

Blueberries

Who were you with?

42%

Of consumption of blueberries (on average) is with a spouse/partner.



Blueberries

Which were important when choosing to consume?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av	Aus
Tasty	57%	58%	53%	57%	51%	52%	61%	51%	47%	59%	66%	54%	63%	56%	71%
Quick & Easy	53%	51%	49%	43%	38%	31%	46%	46%	48%	39%	45%	47%	40%	44%	63%
Healthy & Nutritious	35%	33%	41%	41%	21%	37%	34%	32%	37%	37%	45%	31%	38%	36%	42%
Indulgence	23%	40%	38%	46%	20%	27%	45%	34%	35%	45%	44%	40%	45%	37%	26%
Physical & Mental Energy	24%	20%	25%	32%	11%	21%	22%	18%	18%	28%	31%	26%	28%	23%	27%
Connection	17%	18%	22%	48%	13%	34%	35%	20%	27%	44%	47%	35%	35%	30%	17%

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Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	295	294	300	300	297	222	294	294	309	302	40

Hort Innovation

Blueberries

Which were important when choosing to consume?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av	Aus
Really tasty	44%	41%	26%	27%	32%	27%	34%	30%	36%	29%	32%	31%	35%	33%	53%
Quick and easy	36%	33%	32%	19%	29%	17%	26%	28%	22%	21%	24%	26%	20%	26%	42%
Refreshing	22%	22%	29%	32%	16%	16%	34%	20%	8%	20%	39%	28%	20%	23%	33%
Has the nutrition my mind / body needs	20%	16%	25%	19%	14%	23%	21%	13%	15%	16%	23%	15%	23%	19%	24%
To satisfy a craving	9%	21%	19%	21%	6%	6%	20%	12%	13%	16%	20%	16%	23%	15%	11%
Everyone would eat	9%	12%	9%	18%	8%	23%	17%	15%	11%	23%	18%	17%	15%	15%	14%
Good for sharing	10%	8%	15%	21%	3%	16%	18%	9%	13%	18%	21%	16%	20%	15%	6%
That helped me relax / unwind	3%	4%	9%	13%	9%	15%	12%	10%	17%	17%	17%	9%	10%	11%	5%
To cheer me up	8%	4%	8%	18%	5%	10%	16%	18%	6%	11%	14%	13%	10%	11%	0%
That does not require much thought	10%	11%	13%	9%	11%	8%	10%	14%	22%	10%	6%	9%	5%	11%	17%

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	295	294	300	300	297	222	294	294	309	302	40

Blueberries

What were you looking for when you consumed?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
Sweet	25%	27%	21%	21%	33%	30%	25%	25%	21%	16%	24%	20%	20%	24%
Refreshing taste	29%	27%	22%	24%	24%	31%	27%	16%	12%	24%	34%	25%	10%	23%
Fresh / Light	24%	23%	17%	27%	9%	26%	30%	23%	16%	19%	35%	20%	13%	22%
Rich in anti-oxidants	17%	15%	31%	17%	7%	19%	24%	17%	30%	13%	22%	16%	15%	19%
Good source of minerals & vitamins / Nutritionally dense	10%	11%	18%	11%	15%	14%	17%	13%	21%	17%	24%	13%	18%	16%
Quick / easy to prepare	22%	19%	17%	11%	8%	4%	21%	16%	13%	7%	16%	10%	15%	14%
Low in calories	15%	16%	15%	14%	8%	11%	15%	16%	13%	13%	14%	12%	15%	14%
Considered a superfood	14%	12%	17%	9%	5%	21%	10%	10%	12%	11%	11%	11%	13%	12%
Contains fibre	6%	8%	8%	12%	6%	9%	15%	16%	20%	12%	16%	9%	8%	11%
Low in fat	10%	10%	8%	18%	2%	5%	14%	11%	6%	12%	14%	13%	5%	10%

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Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	295	294	300	300	297	222	294	294	309	302	40

Hort Innovation

Blueberries

What are the reasons you may not choose?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
It is too expensive	34%	32%	48%	27%	28%	35%	52%	40%	46%	28%	32%	25%	25%	35%
It bruises easily	5%	6%	16%	14%	8%	7%	12%	21%	17%	33%	13%	13%	20%	14%
It goes off too quickly / it does not last	12%	8%	14%	12%	8%	8%	13%	14%	16%	17%	13%	15%	13%	12%
There are more exciting alternatives	9%	10%	10%	17%	13%	16%	10%	6%	4%	15%	25%	16%	8%	12%
Quality is often poor	11%	12%	12%	12%	4%	10%	15%	17%	12%	17%	17%	16%	0%	12%
It will not fill me up	6%	8%	9%	16%	7%	13%	11%	10%	8%	8%	11%	18%	10%	10%
They are never in the right state of ripeness when sold in shops	7%	10%	9%	10%	5%	4%	7%	9%	8%	9%	11%	11%	15%	9%
Not enough people in my household like it/them	6%	7%	7%	13%	5%	9%	10%	7%	6%	12%	10%	13%	5%	8%
Too much packaging	8%	5%	6%	12%	2%	3%	6%	9%	6%	12%	7%	9%	8%	7%
The quantity is more than I typically need	6%	8%	4%	10%	4%	5%	6%	7%	6%	9%	7%	7%	13%	7%

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Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	295	294	300	300	297	222	294	294	309	302	40

Hort Innovation

Blueberries

What else would you typically consider having instead?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
Apple	19%	25%	31%	37%	16%	19%	38%	19%	27%	26%	34%	27%	20%	26%
Bananas	29%	24%	38%	31%	17%	16%	31%	25%	20%	17%	30%	26%	18%	25%
Strawberries	37%	31%	8%	10%	19%	23%	25%	18%	25%	20%	32%	28%	25%	23%
Mango	9%	11%	22%	28%	2%	7%	34%	7%	11%	18%	35%	23%	23%	18%
Blackberries	17%	15%	28%	27%	6%	10%	15%	11%	12%	10%	18%	16%	10%	15%
Kiwifruit	10%	8%	17%	18%	14%	11%	21%	13%	23%	19%	13%	15%	13%	15%
Table Grapes	19%	12%	0%	0%	7%	18%	13%	18%	24%	21%	17%	28%	15%	15%
Cherries	11%	14%	19%	17%	2%	12%	12%	14%	20%	15%	15%	19%	15%	14%
Melon	11%	9%	24%	16%	5%	4%	21%	4%	5%	16%	23%	20%	23%	14%
Raspberries	33%	16%	16%	15%	10%	12%	13%	10%	7%	8%	9%	11%	8%	13%

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	295	294	300	300	297	222	294	294	309	302	40

Blueberries

What does premium quality mean to you?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
Fresher	37%	35%	35%	39%	21%	28%	46%	36%	34%	40%	49%	43%	28%	36%
Sweeter	25%	22%	33%	22%	19%	23%	28%	28%	22%	27%	28%	24%	23%	25%
Organic / free from pesticides	17%	13%	27%	30%	15%	26%	27%	18%	28%	23%	33%	23%	23%	23%
More flavour	32%	22%	16%	25%	22%	20%	12%	32%	14%	25%	28%	18%	20%	22%
Right state of ripeness	31%	31%	22%	22%	8%	17%	21%	15%	19%	24%	27%	23%	20%	22%
Higher in vitamins and minerals	12%	16%	22%	23%	14%	18%	22%	18%	30%	25%	37%	19%	13%	21%
I trust its safety	10%	18%	14%	27%	15%	15%	18%	13%	14%	20%	27%	26%	18%	18%
More appetizing (e.g. not bruised, damaged)	13%	20%	15%	14%	6%	16%	15%	12%	19%	26%	20%	16%	8%	15%
Lasts longer	18%	15%	16%	23%	3%	4%	18%	11%	7%	23%	20%	17%	15%	15%
Larger than normal	13%	15%	23%	14%	10%	11%	19%	18%	5%	14%	20%	10%	8%	14%

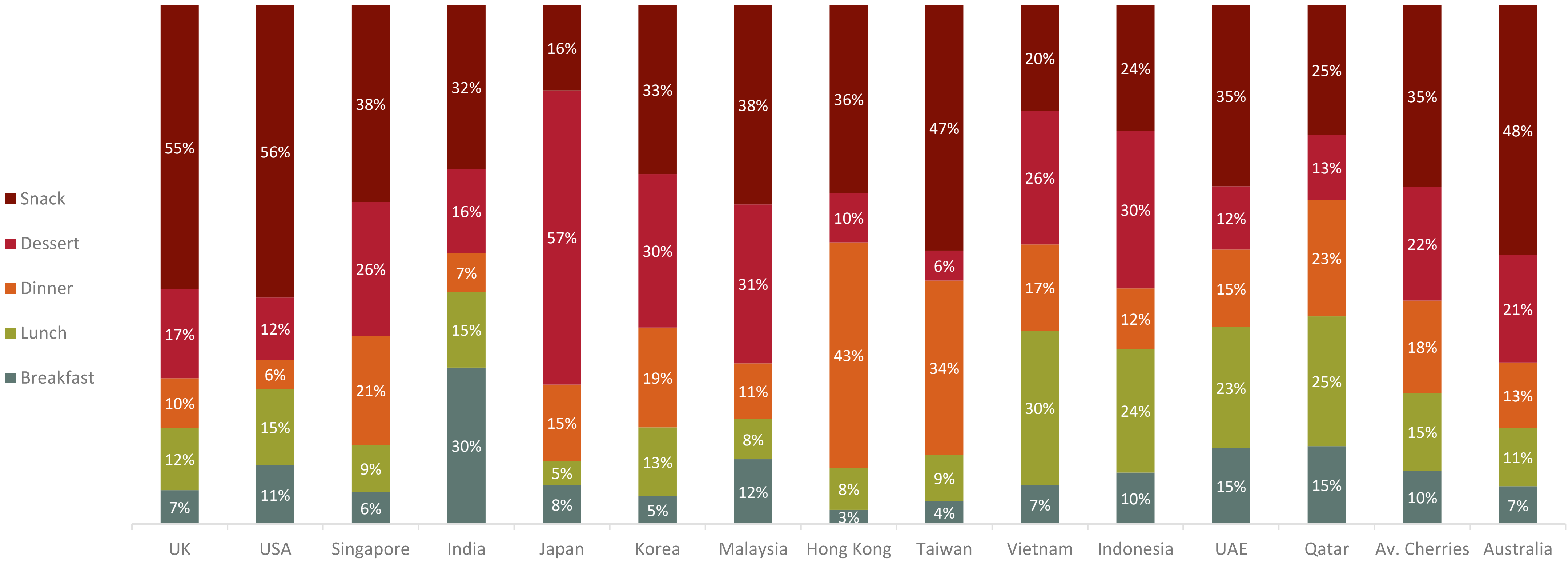
Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	295	294	300	300	297	222	294	294	309	302	40

4.4 Cherries

Cherry

When did you consume?

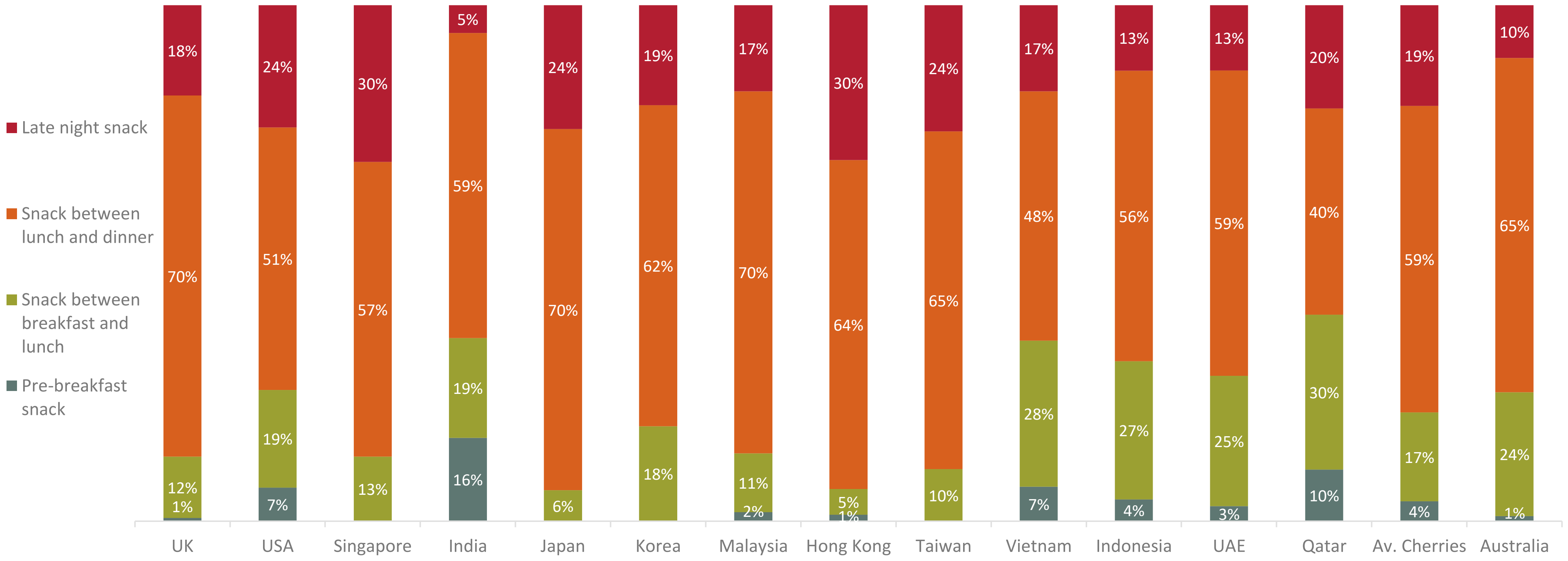


Source: Kantar HIA International Demand Study 2023

	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
N=	292	300	295	295	305	301	297	221	294	295	293	295	40

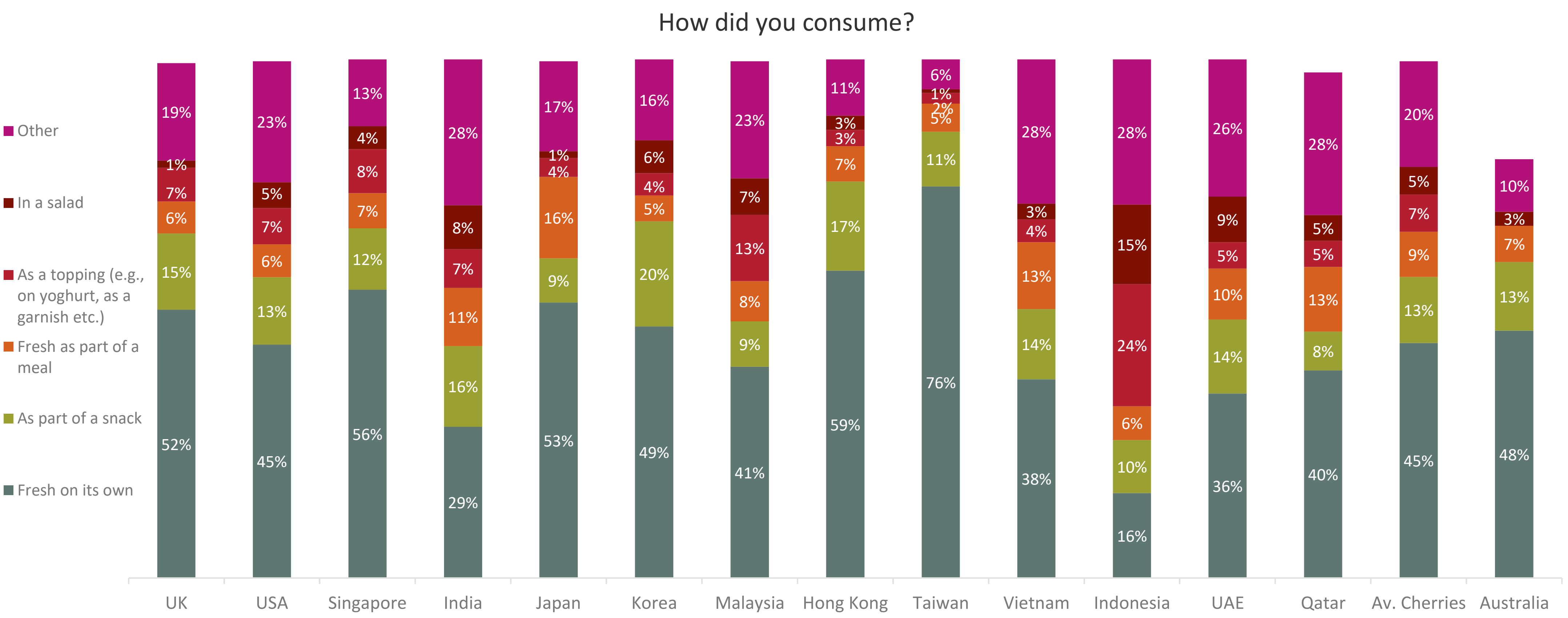
Cherry

What kind of snack was it?



Source: Kantar HIA International Demand Study 2023

Cherry



'Other' = In a smoothie / frappe / juice, As an ingredient in baking, Cooked on its own, For decoration / show only, As an ingredient in cooking, As part of an alcoholic drink e.g. cocktail, To make baby food / puree and Don't know

Source: Kantar HIA International Demand Study 2023

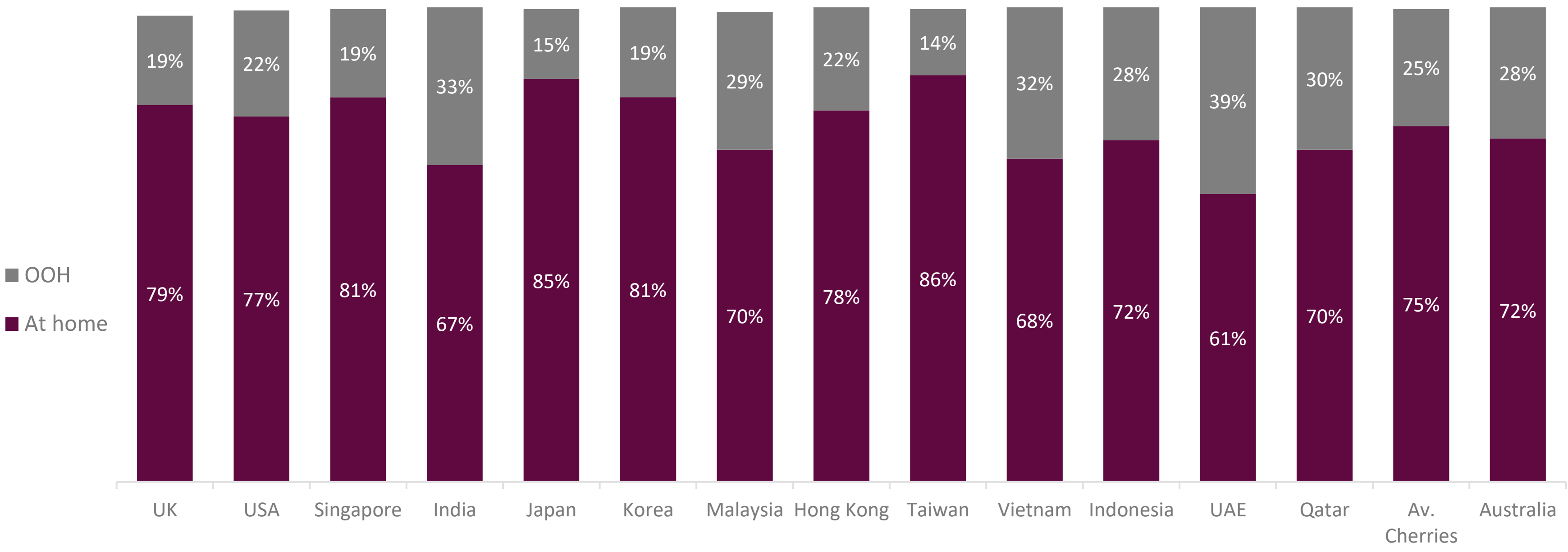
N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	295	295	305	301	297	221	294	295	293	295	40

Cherry

Where were you?

75%

Of consumption of cherries is in the home, this varies only slightly by market



KANTAR

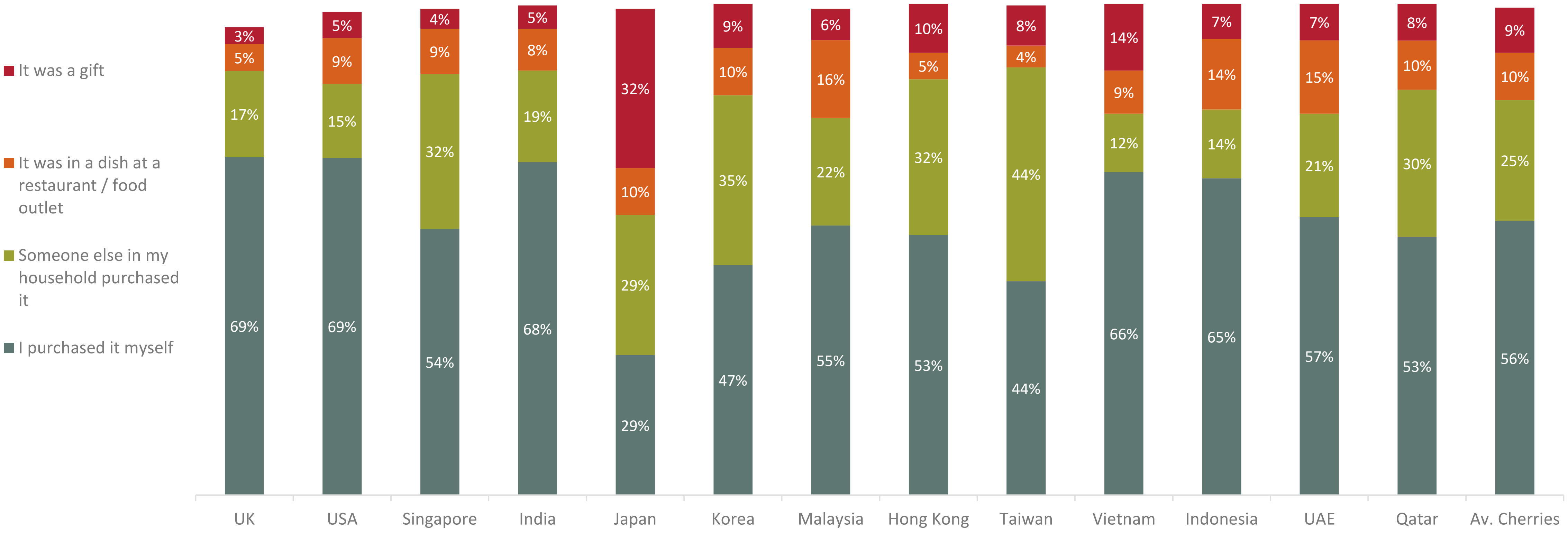
Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	295	295	305	301	297	221	294	295	293	295	40

Hort Innovation

Cherry

Where did you get them from?



KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	295	295	305	301	297	221	294	295	293	295	40

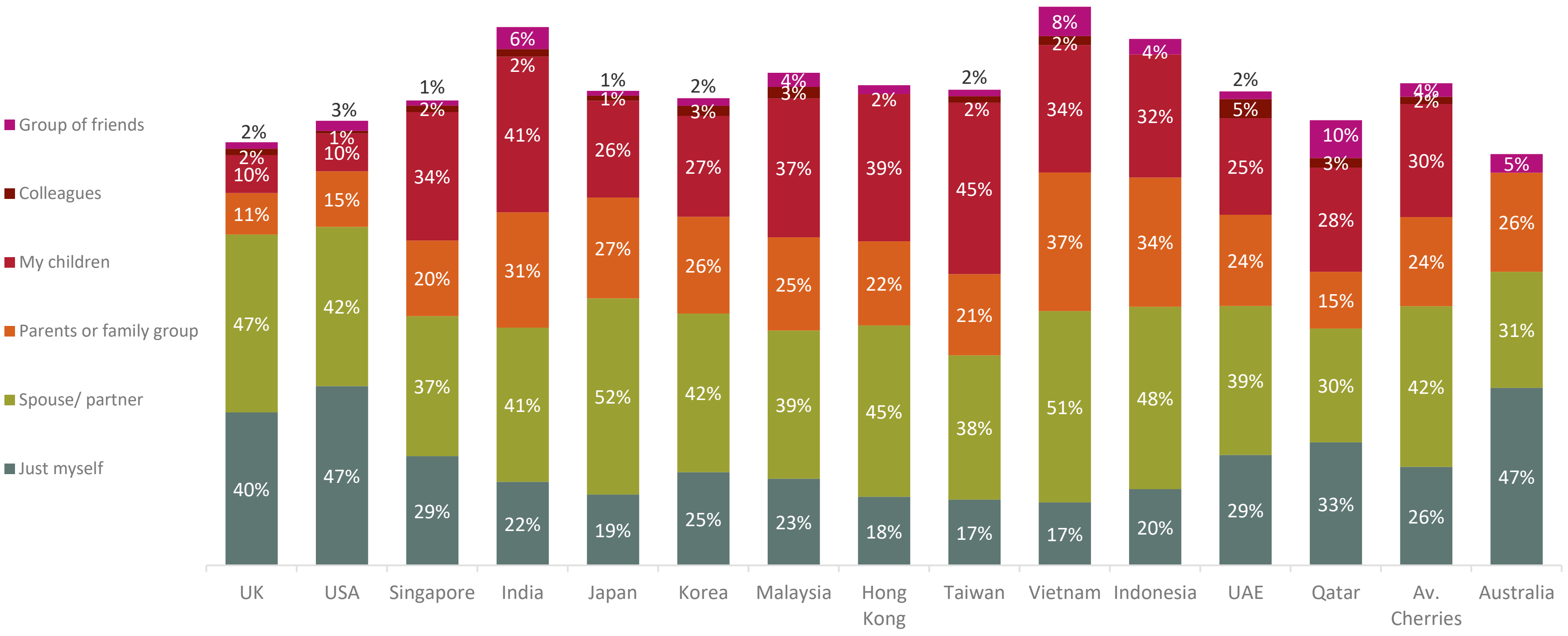
Hort Innovation

Cherry

Who were you with?

30%

Of consumption of cherries (on average) is with children.



Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	295	295	305	301	297	221	294	295	293	295	40

Cherry

Which were important when choosing to consume?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av	Aus
Tasty	67%	60%	62%	61%	60%	63%	57%	60%	57%	59%	63%	57%	53%	60%	66%
Quick & Easy	49%	53%	44%	44%	36%	28%	53%	41%	45%	33%	41%	45%	43%	43%	43%
Healthy & Nutritious	20%	25%	29%	39%	10%	21%	33%	23%	26%	34%	38%	32%	30%	28%	27%
Indulgence	38%	46%	39%	39%	28%	28%	36%	31%	45%	49%	46%	42%	25%	38%	37%
Physical & Mental Energy	23%	25%	21%	35%	6%	12%	18%	15%	11%	27%	25%	33%	23%	21%	19%
Connection	25%	27%	26%	42%	19%	37%	28%	25%	26%	43%	43%	37%	23%	31%	31%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	295	295	305	301	297	221	294	295	293	295	40

Cherry

Which were important when choosing to consume?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av	Aus
Really tasty	48%	44%	32%	35%	46%	34%	29%	43%	46%	37%	32%	28%	35%	38%	47%
Refreshing	28%	27%	32%	31%	14%	28%	30%	14%	7%	23%	40%	31%	25%	25%	34%
Quick and easy	35%	38%	23%	24%	25%	13%	31%	19%	19%	17%	25%	20%	25%	24%	26%
Everyone would eat	13%	7%	19%	18%	9%	22%	16%	19%	21%	22%	14%	15%	13%	16%	12%
To satisfy a craving	12%	25%	20%	21%	7%	5%	19%	10%	17%	17%	15%	21%	10%	15%	12%
Good for sharing	17%	13%	18%	15%	5%	14%	14%	14%	17%	17%	17%	14%	8%	14%	13%
Has the nutrition my mind / body needs	10%	12%	14%	18%	5%	12%	20%	9%	12%	15%	16%	17%	15%	13%	13%
To cheer me up	9%	6%	14%	18%	4%	9%	15%	19%	5%	15%	16%	15%	10%	12%	0%
To treat / indulge myself or others	21%	16%	13%	9%	10%	6%	13%	10%	18%	11%	11%	7%	8%	12%	16%
That helped me relax / unwind	4%	10%	9%	10%	13%	17%	8%	13%	14%	16%	23%	10%	5%	12%	8%

KANTAR

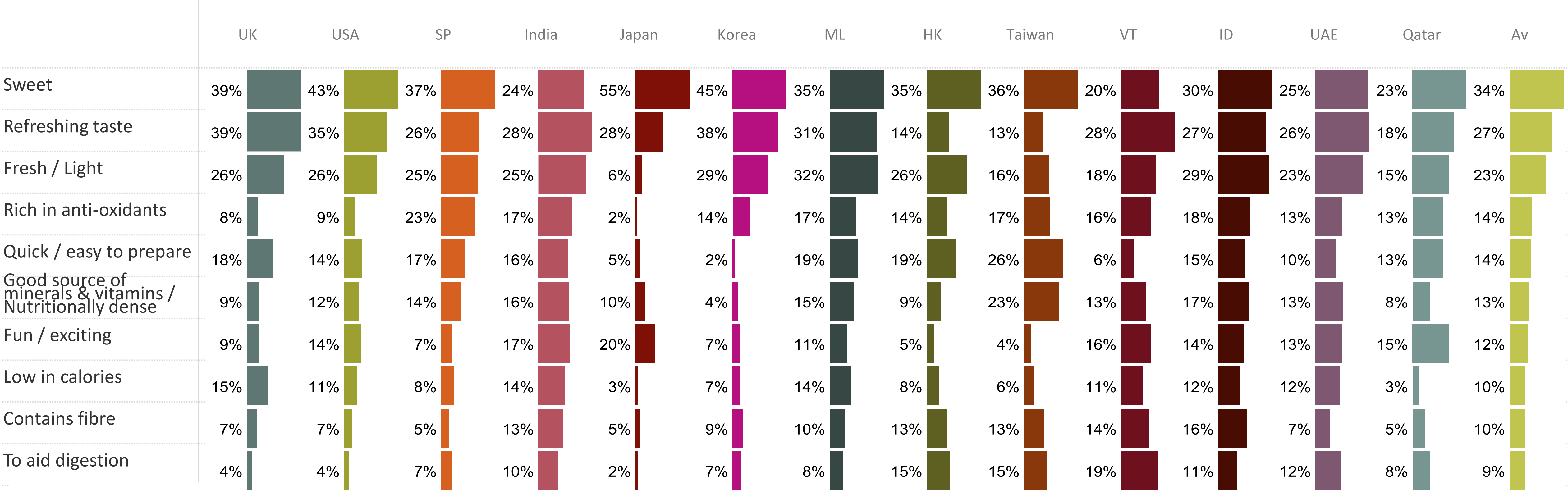
Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	295	295	305	301	297	221	294	295	293	295	40

Hort Innovation

Cherry

What were you looking for when you consumed?



	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
Sweet	39%	43%	37%	24%	55%	45%	35%	35%	36%	20%	30%	25%	23%	34%
Refreshing taste	39%	35%	26%	28%	28%	38%	31%	14%	13%	28%	27%	26%	18%	27%
Fresh / Light	26%	26%	25%	25%	6%	29%	32%	26%	16%	18%	29%	23%	15%	23%
Rich in anti-oxidants	8%	9%	23%	17%	2%	14%	17%	14%	17%	16%	18%	13%	13%	14%
Quick / easy to prepare	18%	14%	17%	16%	5%	2%	19%	19%	26%	6%	15%	10%	13%	14%
Good source of minerals & vitamins / Nutritionally dense	9%	12%	14%	16%	10%	4%	15%	9%	23%	13%	17%	13%	8%	13%
Fun / exciting	9%	14%	7%	17%	20%	7%	11%	5%	4%	16%	14%	13%	15%	12%
Low in calories	15%	11%	8%	14%	3%	7%	14%	8%	6%	11%	12%	12%	3%	10%
Contains fibre	7%	7%	5%	13%	5%	9%	10%	13%	13%	14%	16%	7%	5%	10%
To aid digestion	4%	4%	7%	10%	2%	7%	8%	15%	15%	19%	11%	12%	8%	9%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	295	295	305	301	297	221	294	295	293	295	40

Hort Innovation

Cherry

What are the reasons you may not choose?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
It is too expensive	41%	40%	48%	28%	43%	45%	47%	49%	65%	32%	29%	32%	33%	41%
It bruises easily	3%	6%	12%	13%	10%	4%	8%	16%	17%	27%	13%	15%	20%	13%
Quality is often poor	11%	9%	12%	15%	4%	9%	15%	14%	12%	15%	15%	17%	13%	12%
There are more exciting alternatives	9%	11%	10%	13%	9%	16%	12%	6%	6%	14%	22%	14%	15%	12%
It goes off too quickly / it does not last	11%	7%	10%	11%	10%	5%	10%	13%	10%	15%	10%	16%	10%	11%
It will not fill me up	7%	9%	6%	17%	5%	10%	12%	5%	4%	12%	9%	15%	20%	10%
It contains too much sugar	5%	8%	8%	17%	3%	8%	9%	10%	7%	11%	10%	12%	13%	9%
Not enough people in my household like it/them	7%	9%	12%	8%	4%	11%	10%	3%	2%	11%	11%	13%	8%	8%
They are never in the right state of ripeness when sold in shops	9%	11%	6%	15%	4%	3%	8%	10%	6%	8%	11%	7%	8%	8%
It is too messy to eat	7%	6%	7%	11%	7%	7%	3%	4%	5%	8%	11%	7%	8%	7%

KANTAR

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N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	295	295	305	301	297	221	294	295	293	295	40

Hort Innovation

Cherry

What else would you typically consider having instead?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
Apple	29%	34%	32%	39%	23%	20%	41%	27%	41%	33%	33%	35%	23%	31%
Bananas	27%	27%	30%	38%	17%	16%	38%	23%	35%	24%	34%	36%	28%	29%
Strawberries	32%	35%	10%	12%	30%	27%	30%	32%	27%	25%	29%	33%	33%	27%
Mango	10%	19%	25%	37%	7%	8%	40%	17%	17%	25%	34%	32%	38%	24%
Table Grapes	27%	24%	0%	0%	13%	21%	18%	29%	27%	31%	18%	37%	28%	21%
Blueberries	21%	23%	26%	20%	8%	22%	24%	24%	17%	19%	16%	17%	10%	19%
Melon	16%	18%	23%	21%	12%	7%	26%	9%	6%	17%	21%	21%	38%	18%
Pineapple	11%	16%	14%	28%	16%	6%	22%	12%	16%	11%	16%	20%	28%	16%
Kiwifruit	8%	8%	20%	20%	17%	11%	23%	15%	24%	18%	12%	17%	10%	16%
Pear	12%	15%	15%	16%	8%	8%	18%	15%	16%	18%	22%	14%	18%	15%

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	295	295	305	301	297	221	294	295	293	295	40

Cherry

What does premium quality mean to you?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
Fresher	33%	36%	37%	38%	19%	25%	46%	39%	35%	36%	48%	40%	55%	37%
Sweeter	32%	27%	40%	29%	32%	28%	27%	35%	26%	30%	33%	23%	23%	29%
More flavour	31%	29%	17%	27%	21%	23%	13%	38%	10%	27%	25%	19%	23%	23%
Right state of ripeness	29%	29%	19%	24%	10%	19%	19%	19%	19%	21%	26%	20%	13%	21%
Organic / free from pesticides	11%	10%	27%	31%	10%	19%	30%	14%	17%	27%	34%	27%	5%	20%
Higher in vitamins and minerals	7%	10%	19%	26%	9%	16%	26%	13%	19%	24%	35%	20%	20%	19%
More appetizing (e.g. not bruised, damaged)	14%	22%	15%	16%	11%	16%	18%	15%	14%	25%	24%	19%	13%	17%
I trust its safety	9%	12%	15%	25%	14%	17%	18%	13%	9%	16%	27%	22%	8%	16%
Premium packaging	4%	9%	16%	22%	10%	8%	19%	11%	13%	15%	32%	20%	5%	14%
Lasts longer	16%	17%	14%	23%	3%	4%	16%	11%	4%	19%	17%	22%	10%	14%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	295	295	305	301	297	221	294	295	293	295	40

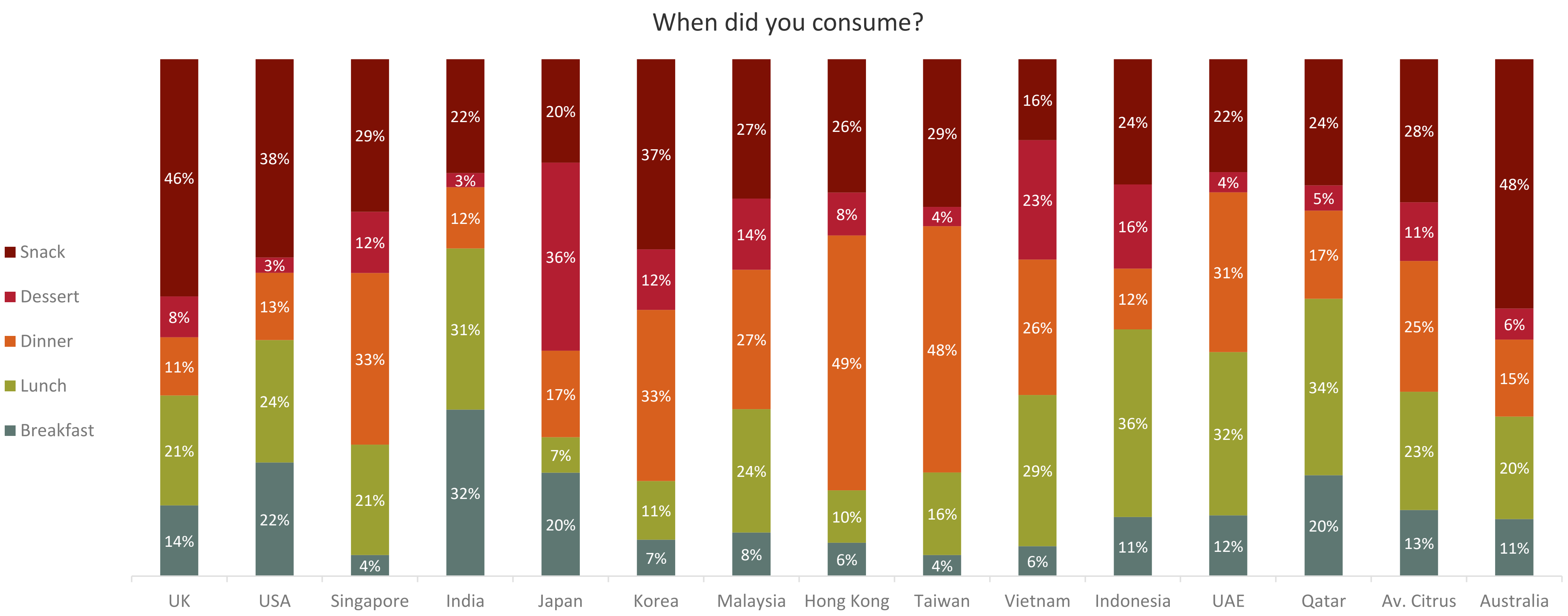
Hort Innovation

KANTAR

4.5
Citrus fruits

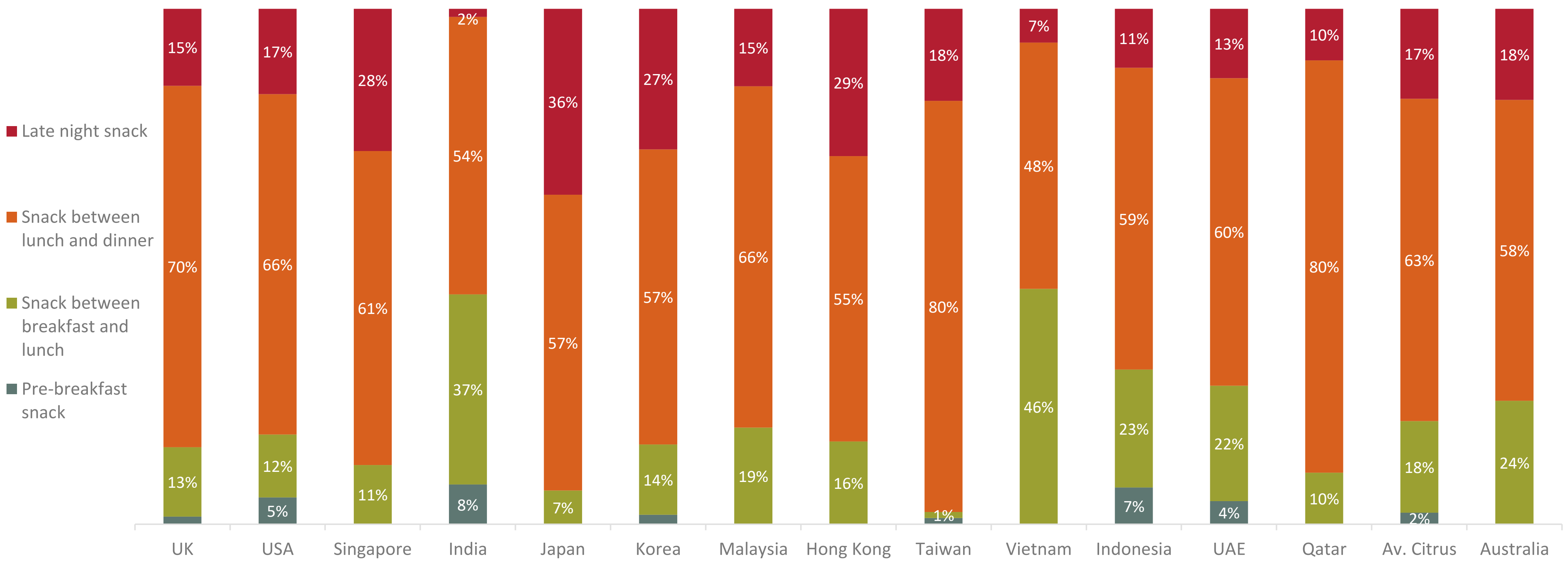
Hort Innovation

Citrus



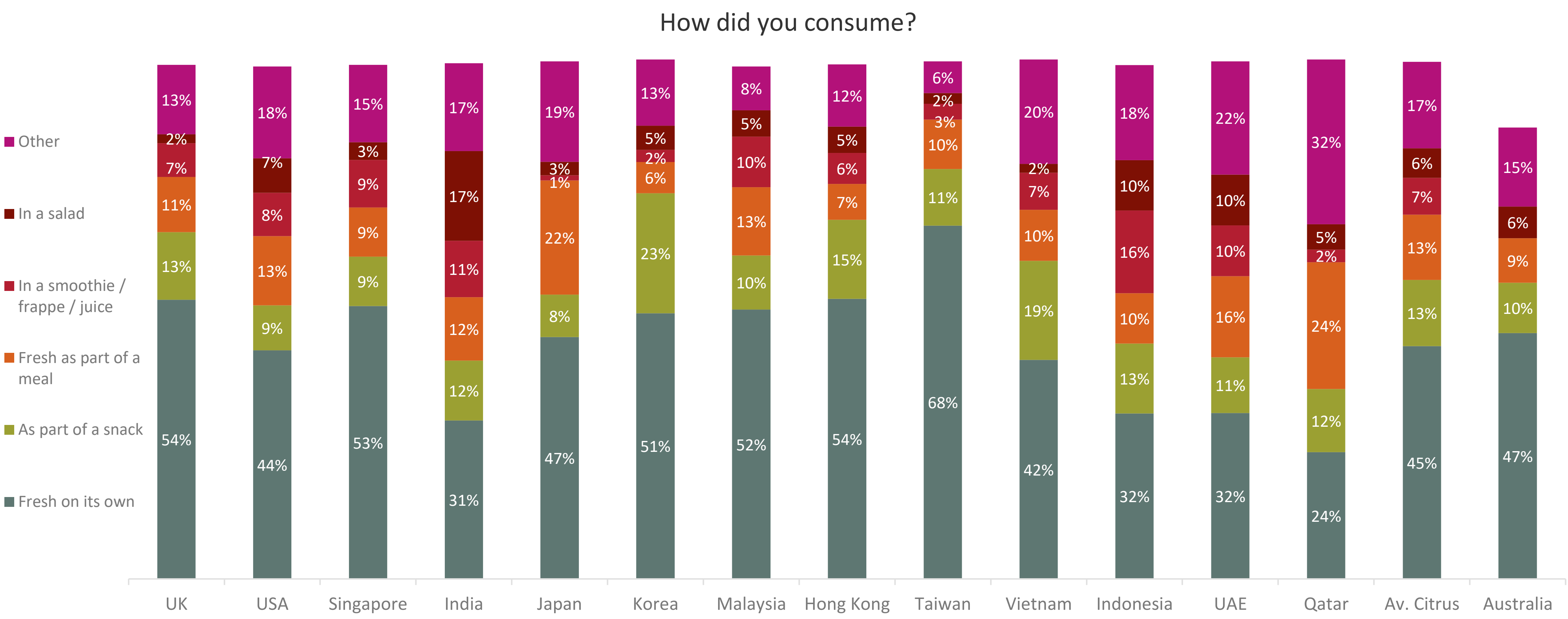
Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	295	295	305	299	297	217	294	294	289	307	41



Source: Kantar HIA International Demand Study 2023

Citrus



	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar	Av. Citrus	Australia
Other	13%	18%	15%	17%	19%	13%	8%	12%	6%	20%	18%	22%	32%	17%	15%
In a salad	2%	7%	3%	17%	3%	5%	5%	5%	2%	2%	10%	10%	5%	6%	6%
In a smoothie / frappe / juice	7%	8%	9%	11%	1%	2%	10%	6%	3%	7%	16%	10%	2%	7%	
Fresh as part of a meal	11%	13%	9%	12%	22%	6%	13%	7%	10%	10%	10%	16%	24%	13%	9%
As part of a snack	13%	9%	9%	12%	8%	23%	10%	15%	11%	19%	13%	11%	12%	13%	10%
Fresh on its own	54%	44%	53%	31%	47%	51%	52%	54%	68%	42%	32%	32%	24%	45%	47%

'Other' = As an ingredient in cooking, As a topping (e.g., on yoghurt, as a garnish etc.), Cooked on its own, As an ingredient in baking, As part of an alcoholic drink e.g. cocktail, To make baby food / puree, For decoration / show only and Don't know

Source: Kantar HIA International Demand Study 2023

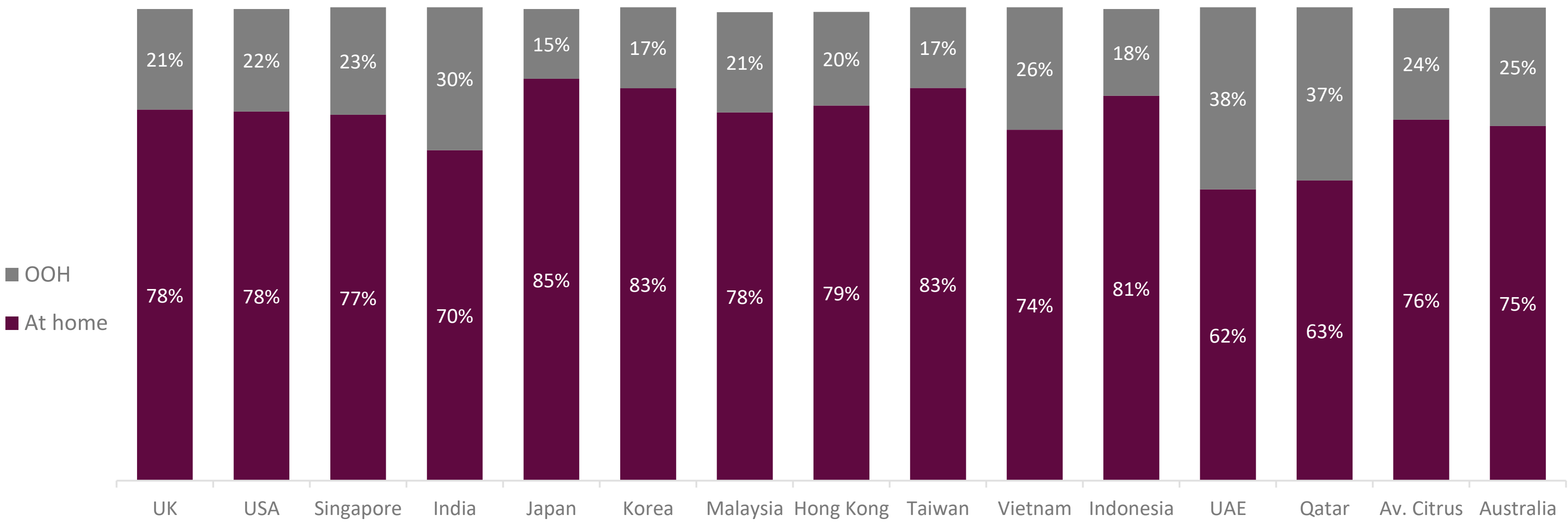
N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	295	295	305	299	297	217	294	294	289	307	41

Citrus

Where were you?

76%

Of consumption of citrus fruits is in the home, this varies only slightly by market



KANTAR

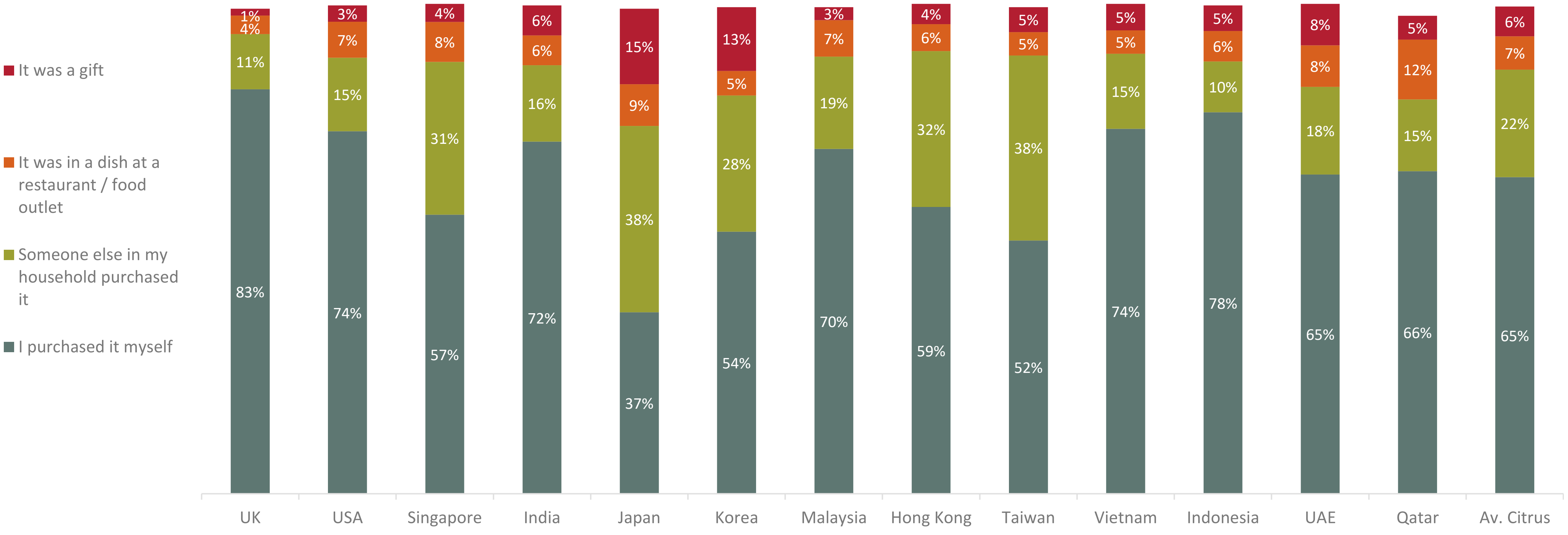
Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	295	295	305	299	297	217	294	294	289	307	41

Hort Innovation

Citrus

Where did you get them from?



Source: Kantar HIA International Demand Study 2023

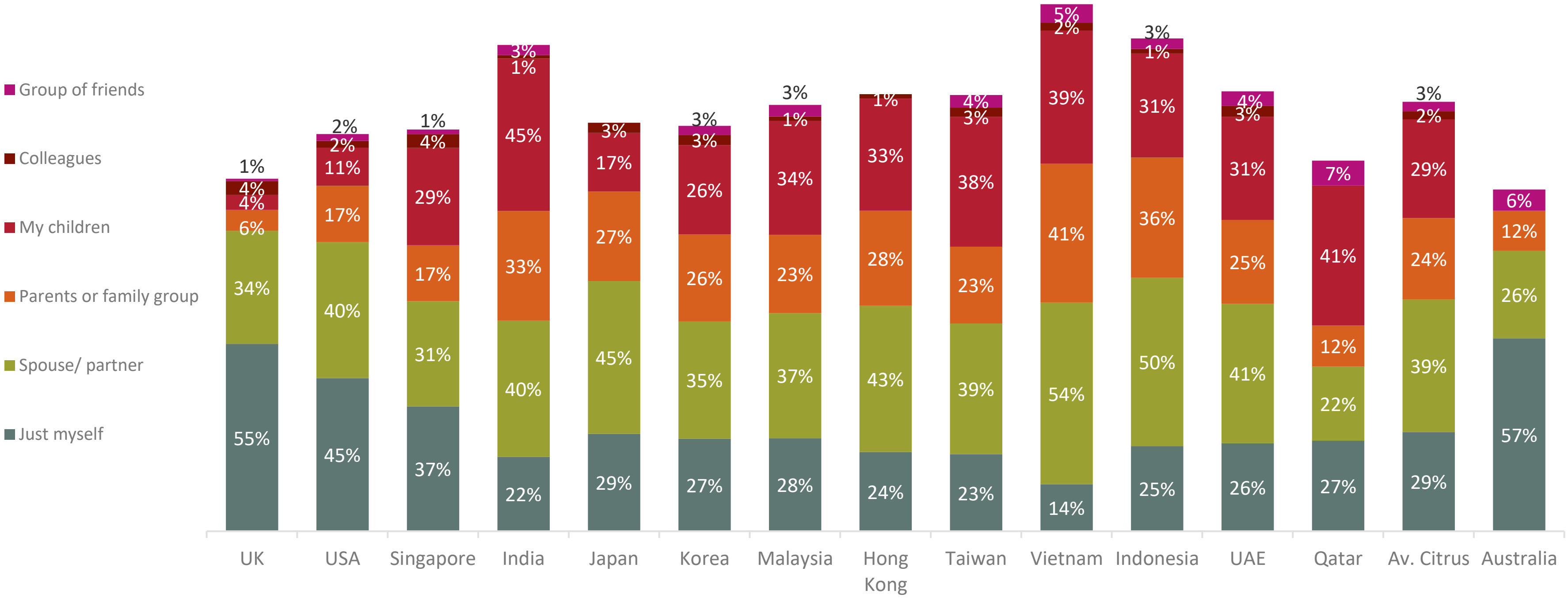
N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	295	295	305	299	297	217	294	294	289	307	41

Citrus

Who were you with?

39%

Of consumption of citrus fruits (on average) is with a spouse/partner.



Source: Kantar HIA International Demand Study 2023

	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
N=	292	300	295	295	305	299	297	217	294	294	289	307	41

Citrus

Which were important when choosing to consume?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av	Aus
Tasty	69%	63%	57%	59%	55%	61%	72%	58%	57%	57%	63%	62%	51%	60%	59%
Quick & Easy	62%	47%	48%	49%	39%	40%	49%	47%	61%	41%	50%	47%	46%	48%	58%
Healthy & Nutritious	33%	32%	45%	48%	21%	21%	45%	40%	34%	45%	49%	46%	49%	39%	31%
Indulgence	22%	32%	31%	41%	25%	27%	32%	26%	33%	47%	43%	34%	46%	34%	22%
Physical & Mental Energy	28%	29%	26%	45%	16%	22%	24%	20%	21%	28%	31%	33%	37%	28%	30%
Connection	10%	20%	24%	30%	8%	26%	24%	17%	14%	36%	36%	35%	27%	24%	14%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	295	295	305	299	297	217	294	294	289	307	41

Hort Innovation

Citrus

Which were important when choosing to consume?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av	Aus
Really tasty	45%	41%	21%	27%	40%	36%	31%	29%	34%	34%	22%	32%	37%	33%	34%
Refreshing	45%	36%	38%	33%	23%	18%	53%	24%	16%	21%	45%	37%	15%	31%	43%
Quick and easy	47%	31%	27%	24%	26%	16%	27%	21%	31%	26%	31%	20%	20%	27%	38%
Has the nutrition my mind / body needs	14%	17%	28%	25%	14%	13%	25%	13%	17%	22%	28%	22%	15%	20%	15%
Everyone would eat	7%	11%	17%	19%	9%	22%	19%	22%	19%	22%	15%	18%	20%	17%	8%
To satisfy a craving	11%	20%	17%	19%	8%	5%	13%	9%	12%	17%	18%	15%	24%	15%	10%
Already available at home / work etc.	16%	14%	15%	13%	3%	15%	15%	15%	16%	9%	17%	13%	17%	14%	19%
To help manage my weight	12%	11%	9%	22%	4%	4%	17%	17%	9%	16%	15%	18%	15%	13%	10%
That does not require much thought	10%	14%	14%	9%	12%	12%	8%	19%	28%	8%	8%	9%	7%	12%	18%
That helped me relax / unwind	5%	6%	7%	13%	11%	16%	9%	10%	12%	19%	22%	10%	17%	12%	9%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	295	295	305	299	297	217	294	294	289	307	41

Hort Innovation

Citrus

What were you looking for when you consumed?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
Refreshing taste	49%	39%	31%	26%	41%	44%	38%	15%	17%	35%	31%	29%	29%	33%
Sweet	28%	24%	22%	14%	37%	38%	26%	25%	25%	22%	26%	19%	17%	25%
Fresh / Light	29%	30%	24%	25%	12%	30%	27%	18%	15%	20%	36%	25%	20%	24%
Good source of minerals & vitamins / Nutritionally dense	16%	13%	17%	17%	21%	13%	19%	18%	24%	17%	25%	14%	17%	18%
Contains fibre	10%	8%	18%	17%	7%	8%	18%	27%	43%	17%	13%	12%	17%	17%
To aid digestion	5%	6%	19%	13%	3%	11%	16%	29%	34%	22%	15%	19%	22%	16%
Quick / easy to prepare	24%	26%	19%	12%	7%	4%	21%	18%	22%	7%	17%	10%	10%	15%
Rich in anti-oxidants	5%	10%	20%	24%	2%	9%	21%	16%	17%	18%	22%	15%	17%	15%
Tangy	18%	17%	15%	16%	2%	12%	15%	6%	13%	10%	7%	10%	5%	11%
That is good value for money	17%	10%	12%	10%	8%	12%	8%	12%	9%	12%	10%	10%	12%	11%

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	292	300	295	295	305	299	297	217	294	294	289	307	41

Citrus

What are the reasons you may not choose?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
It is too expensive	17%	20%	18%	13%	20%	17%	32%	21%	28%	20%	21%	20%	22%	21%
It is too messy to eat	18%	17%	20%	17%	22%	11%	13%	26%	22%	6%	11%	14%	10%	16%
Quality is often poor	13%	17%	13%	14%	5%	8%	22%	12%	16%	20%	21%	17%	12%	15%
There are more exciting alternatives	9%	12%	13%	18%	10%	18%	14%	7%	11%	17%	22%	13%	7%	13%
It bruises easily	7%	8%	8%	17%	10%	4%	14%	16%	10%	34%	11%	11%	12%	13%
It goes off too quickly / it does not last	17%	8%	6%	13%	14%	6%	14%	6%	8%	18%	13%	11%	15%	12%
It contains too much sugar	5%	8%	11%	12%	5%	12%	11%	12%	13%	10%	11%	12%	15%	11%
It will not fill me up	12%	11%	10%	16%	4%	7%	7%	10%	4%	11%	11%	14%	17%	10%
They are never in the right state of ripeness when sold in shops	9%	8%	9%	9%	4%	4%	8%	7%	12%	10%	8%	16%	22%	10%
The quantity is more than I typically need	4%	9%	7%	15%	7%	9%	8%	8%	6%	9%	8%	14%	15%	9%

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	295	295	305	299	297	217	294	294	289	307	41

KANTAR

Hort Innovation

Citrus

What else would you typically consider having instead?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
Apple	42%	42%	51%	57%	34%	40%	49%	35%	48%	35%	45%	37%	34%	42%
Bananas	47%	37%	41%	49%	31%	23%	46%	30%	44%	31%	51%	34%	24%	38%
Mango	15%	14%	36%	38%	5%	9%	49%	14%	20%	29%	46%	32%	22%	25%
Strawberries	33%	31%	11%	9%	23%	26%	20%	28%	17%	23%	22%	23%	20%	22%
Melon	24%	20%	28%	28%	8%	6%	30%	9%	7%	20%	38%	29%	29%	21%
Pineapple	20%	23%	22%	32%	18%	8%	23%	17%	22%	13%	25%	27%	24%	21%
Pear	24%	18%	25%	18%	6%	9%	26%	21%	22%	18%	27%	18%	22%	20%
Kiwifruit	12%	10%	23%	26%	23%	14%	25%	18%	32%	15%	12%	18%	22%	19%
Table Grapes	28%	27%	0%	0%	11%	13%	14%	21%	24%	30%	13%	27%	24%	18%
Papaya	0%	0%	29%	36%	1%	1%	31%	10%	21%	15%	32%	16%	12%	16%

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	295	295	305	299	297	217	294	294	289	307	41

Citrus

What does premium quality mean to you?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
Fresher	41%	36%	39%	52%	21%	32%	52%	44%	37%	46%	49%	42%	51%	42%
Sweeter	19%	26%	35%	24%	30%	30%	31%	41%	36%	37%	31%	24%	17%	29%
Higher in vitamins and minerals	15%	20%	26%	36%	24%	20%	34%	25%	34%	30%	38%	28%	27%	27%
More flavour	33%	26%	18%	33%	21%	24%	18%	37%	16%	32%	26%	28%	20%	25%
Organic / free from pesticides	17%	17%	29%	38%	13%	19%	26%	16%	19%	27%	37%	25%	20%	23%
Right state of ripeness	29%	34%	19%	24%	11%	18%	19%	17%	22%	30%	26%	24%	17%	22%
I trust its safety	13%	18%	18%	31%	15%	15%	22%	20%	17%	18%	24%	21%	24%	20%
More appetizing (e.g. not bruised, damaged)	20%	25%	14%	18%	7%	16%	19%	15%	12%	31%	22%	16%	12%	17%
Lasts longer	22%	19%	15%	23%	4%	5%	16%	9%	12%	23%	22%	18%	17%	16%
Locally grown / produced in my area	14%	17%	8%	31%	22%	15%	8%	10%	20%	12%	16%	21%	12%	16%

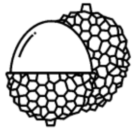
Source: Kantar HIA International Demand Study 2023

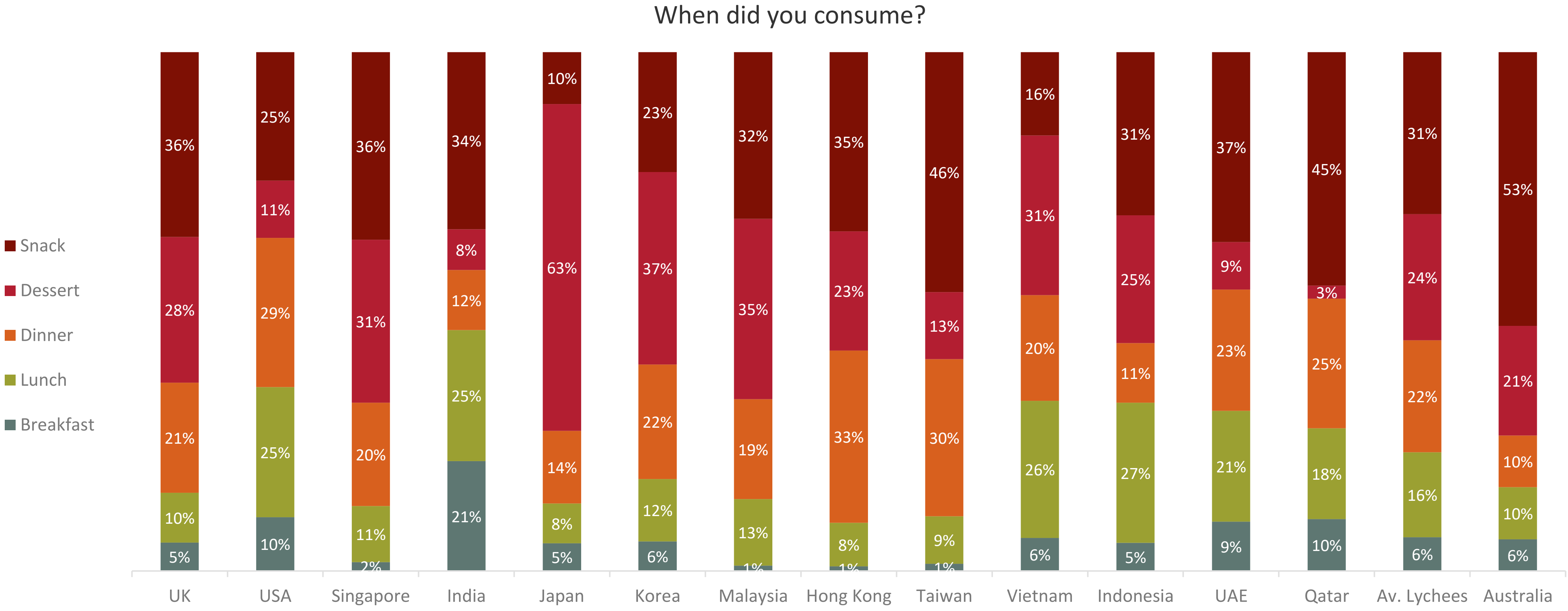
N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	295	295	305	299	297	217	294	294	289	307	41

KANTAR

4.6
Lychees

Hort Innovation





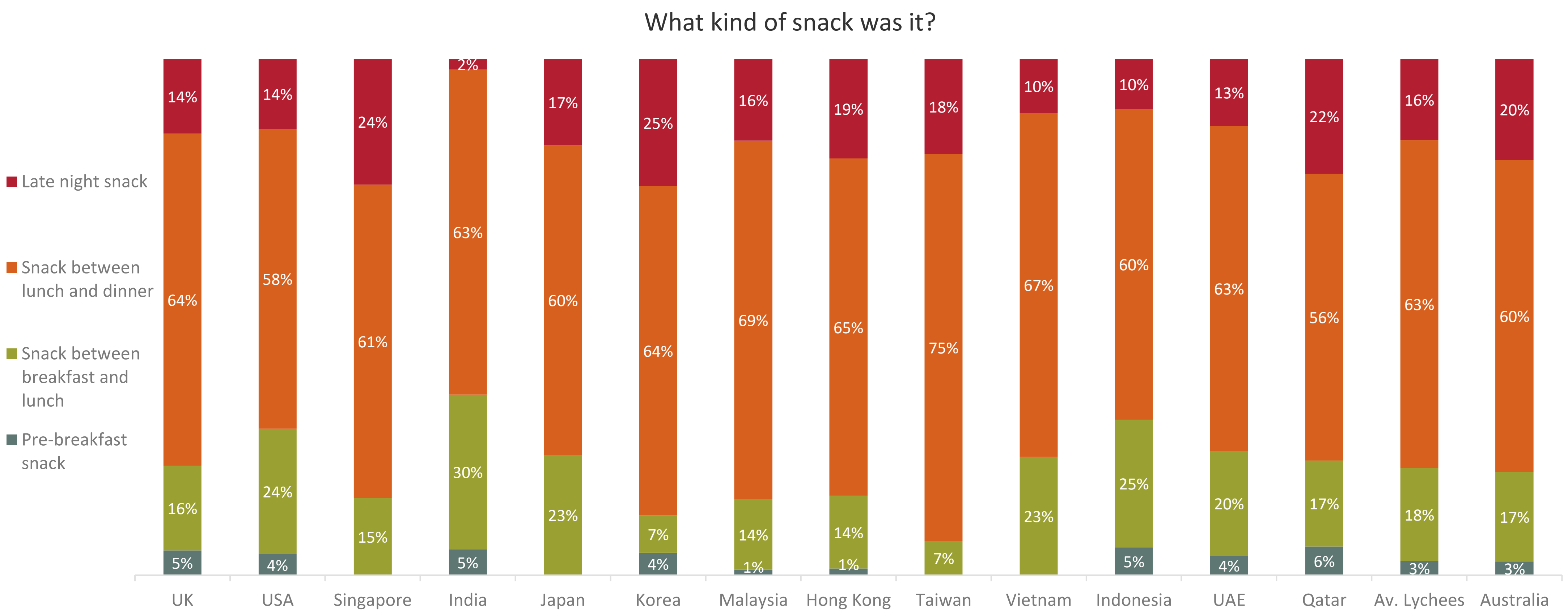
KANTAR

Source: Kantar HIA International Demand Study 2023

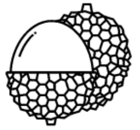
N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	299	296	293	300	299	296	226	294	299	296	295	40

Hort Innovation

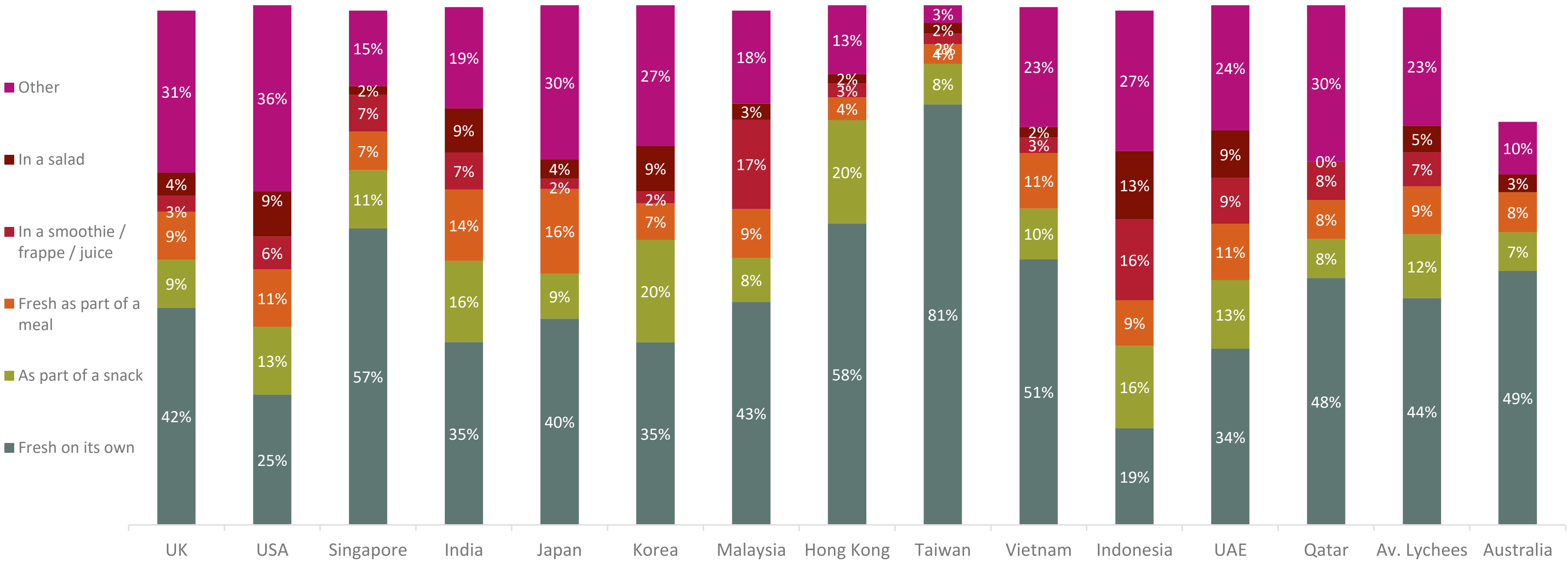
Lychees



Source: Kantar HIA International Demand Study 2023



How did you consume?



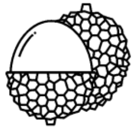
'Other' = As a topping (e.g., on yoghurt, as a garnish etc.), Cooked on its own, As part of an alcoholic drink e.g. cocktail, As an ingredient in cooking, As an ingredient in baking, For decoration / show only, To make baby food / puree and Don't know

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	299	296	293	300	299	296	226	294	299	296	295	40

KANTAR

Hort Innovation

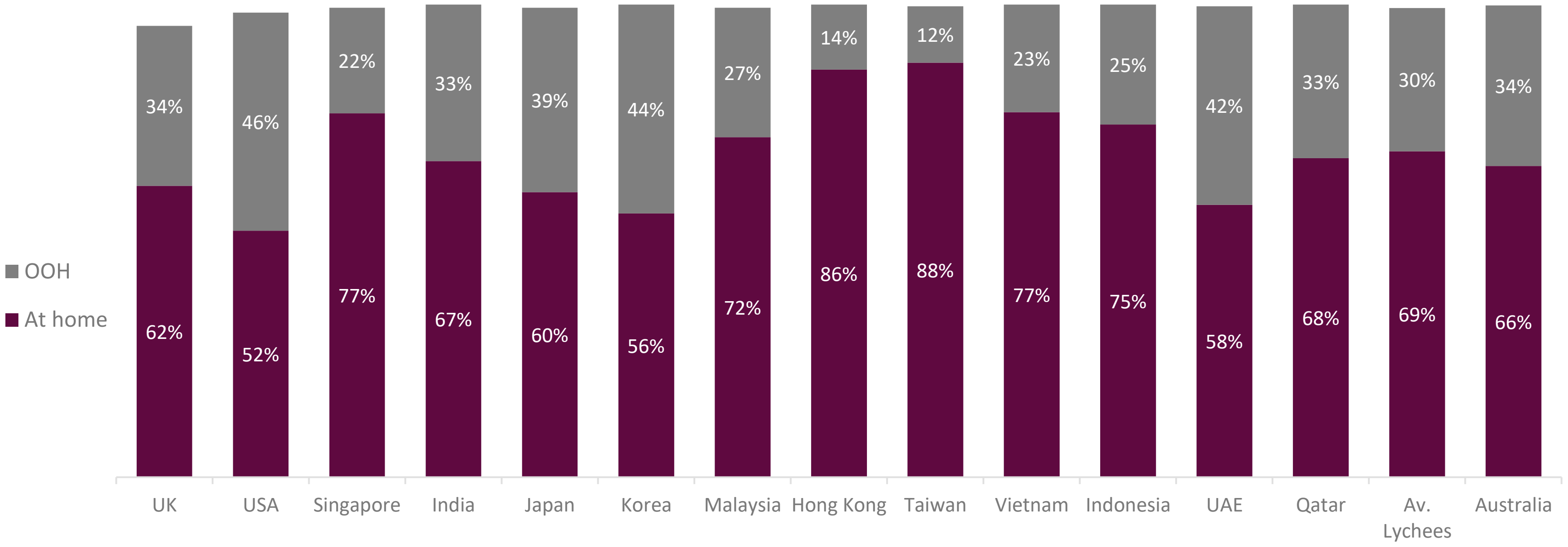


Lychees

Where were you?

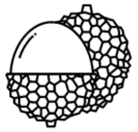
69%

Of consumption of lychees is in the home, this varies only slightly by market



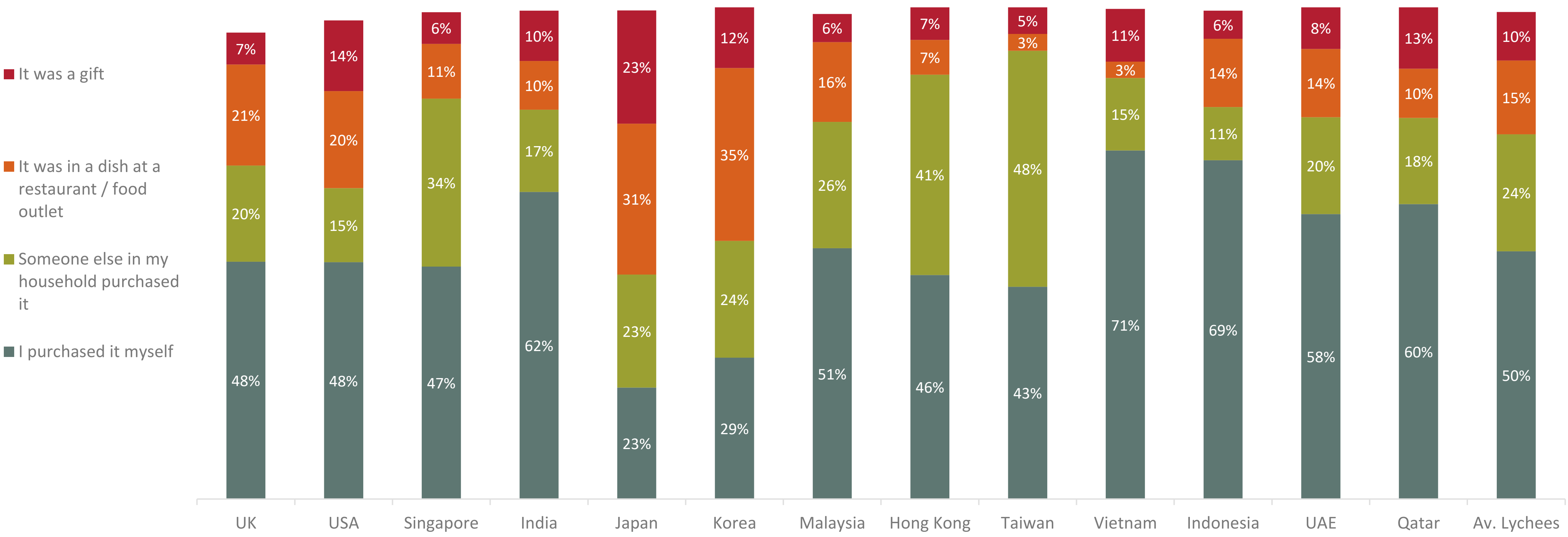
Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	299	296	293	300	299	296	226	294	299	296	295	40



Lychees

Where did you get them from?



Source: Kantar HIA International Demand Study 2023

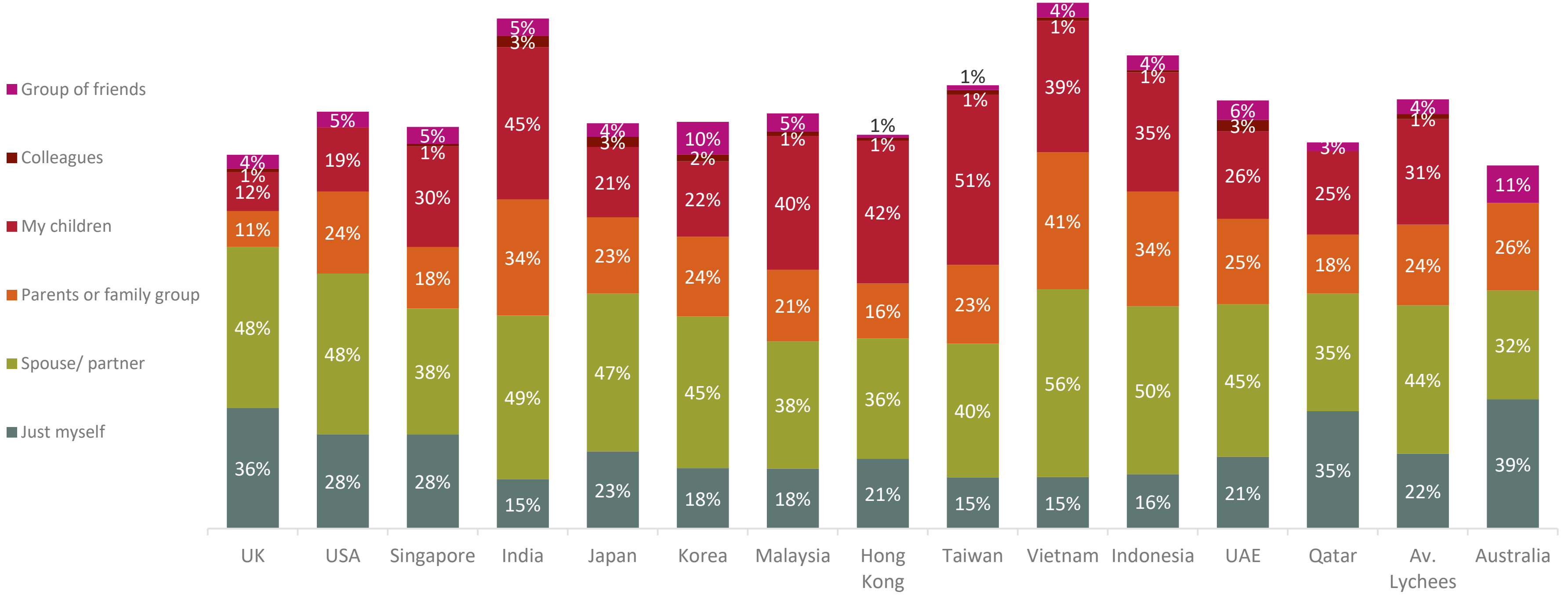
	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
N=	292	299	296	293	300	299	296	226	294	299	296	295	40

Lychees

Who were you with?

31%

Of consumption of lychees (on average) is with children.



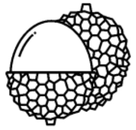
Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	299	296	293	300	299	296	226	294	299	296	295	40

Lychees

Which were important when choosing to consume?

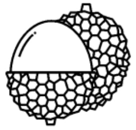
	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av	Aus
Tasty	56%	48%	61%	62%	49%	55%	68%	66%	59%	63%	68%	57%	63%	60%	67%
Quick & Easy	33%	40%	43%	46%	29%	24%	43%	37%	44%	43%	41%	39%	40%	39%	39%
Healthy & Nutritious	20%	28%	17%	37%	11%	16%	18%	12%	12%	30%	36%	28%	30%	23%	15%
Indulgence	32%	34%	46%	48%	19%	33%	54%	46%	41%	44%	51%	45%	35%	41%	36%
Physical & Mental Energy	18%	25%	15%	34%	6%	16%	16%	15%	9%	25%	27%	35%	30%	21%	9%
Connection	32%	42%	28%	40%	27%	42%	32%	24%	22%	44%	43%	32%	33%	34%	30%



Lychees

Which were important when choosing to consume?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av	Aus
Really tasty	34%	28%	36%	34%	36%	21%	39%	42%	45%	39%	36%	28%	35%	35%	41%
Refreshing	28%	21%	37%	35%	14%	25%	43%	22%	6%	23%	45%	32%	18%	27%	38%
Quick and easy	19%	23%	22%	24%	17%	9%	22%	19%	14%	23%	22%	17%	25%	20%	22%
To satisfy a craving	9%	12%	22%	20%	4%	9%	28%	20%	17%	19%	19%	20%	30%	18%	9%
Everyone would eat	8%	12%	16%	17%	8%	22%	19%	17%	21%	25%	17%	14%	25%	17%	10%
Good for sharing	8%	12%	17%	17%	3%	12%	19%	10%	16%	26%	24%	13%	8%	14%	7%
To cheer me up	11%	11%	9%	22%	4%	9%	14%	22%	3%	15%	14%	17%	15%	13%	0%
New and different	17%	20%	4%	14%	18%	26%	4%	5%	3%	10%	10%	12%	20%	13%	11%
To treat / indulge myself or others	17%	11%	20%	10%	5%	7%	17%	14%	16%	8%	15%	11%	3%	12%	16%
That helped me relax / unwind	7%	9%	8%	11%	8%	14%	11%	11%	9%	17%	25%	10%	5%	11%	10%



What were you looking for when you consumed?

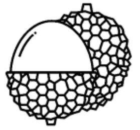
	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
Sweet	30%	19%	50%	23%	36%	31%	44%	46%	48%	32%	37%	24%	30%	35%
Refreshing taste	28%	21%	37%	30%	33%	36%	43%	20%	15%	32%	37%	29%	23%	30%
Fresh / Light	25%	22%	34%	28%	7%	22%	31%	24%	12%	17%	35%	27%	15%	23%
Quick / easy to prepare	14%	12%	14%	10%	4%	4%	20%	18%	22%	8%	13%	9%	8%	12%
Fun / exciting	13%	19%	9%	14%	10%	7%	15%	8%	2%	16%	19%	13%	8%	12%
With a light, mild taste	8%	10%	7%	13%	6%	7%	9%	10%	3%	24%	13%	8%	23%	11%
Good source of minerals & vitamins / Nutritionally dense	8%	11%	6%	16%	10%	6%	8%	7%	10%	17%	20%	11%	8%	11%
With a strong, intense flavour	8%	8%	11%	13%	3%	3%	10%	18%	9%	12%	9%	9%	20%	10%
That is good value for money	9%	7%	9%	11%	4%	4%	11%	15%	10%	11%	7%	13%	20%	10%
Rich in anti-oxidants	6%	9%	7%	19%	1%	6%	9%	4%	2%	14%	18%	12%	15%	9%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	299	296	293	300	299	296	226	294	299	296	295	40

Hort Innovation



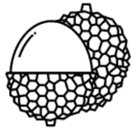
Lychees

What are the reasons you may not choose?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
It is too expensive	28%	17%	25%	25%	22%	24%	33%	31%	35%	19%	24%	24%	30%	26%
It contains too much sugar	5%	8%	22%	15%	3%	9%	18%	32%	30%	26%	17%	10%	13%	16%
There are more exciting alternatives	9%	12%	9%	14%	15%	14%	18%	8%	4%	18%	23%	11%	13%	13%
It bruises easily	7%	10%	8%	18%	4%	4%	9%	10%	8%	33%	10%	13%	15%	12%
It is too messy to eat	8%	9%	15%	9%	17%	16%	7%	20%	16%	9%	5%	9%	8%	11%
Quality is often poor	5%	11%	13%	16%	4%	9%	13%	10%	8%	17%	11%	18%	8%	11%
It goes off too quickly / it does not last	5%	9%	7%	17%	7%	5%	10%	11%	10%	22%	10%	11%	8%	10%
Not enough people in my household like it/them	11%	11%	13%	10%	7%	15%	6%	4%	4%	9%	15%	14%	10%	10%
It will not fill me up	9%	8%	7%	14%	8%	9%	7%	5%	4%	9%	8%	11%	18%	9%
It is not convenient / ideal for on the go	8%	8%	9%	10%	6%	9%	6%	9%	9%	7%	6%	8%	5%	8%

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	299	296	293	300	299	296	226	294	299	296	295	40



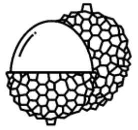
Lychees

What else would you typically consider having instead?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
Apple	21%	30%	37%	44%	15%	18%	39%	22%	32%	35%	36%	33%	23%	29%
Bananas	24%	23%	29%	40%	12%	15%	38%	21%	34%	28%	36%	34%	25%	28%
Mango	27%	20%	36%	34%	10%	16%	43%	22%	28%	26%	41%	26%	28%	27%
Strawberries	30%	24%	7%	11%	15%	20%	20%	21%	18%	20%	21%	26%	25%	20%
Melon	20%	18%	23%	25%	6%	12%	27%	13%	10%	20%	29%	26%	28%	20%
Kiwifruit	17%	14%	22%	22%	18%	11%	22%	16%	23%	16%	13%	17%	23%	18%
Pineapple	19%	18%	14%	28%	14%	12%	19%	15%	20%	12%	16%	22%	15%	17%
Table Grapes	17%	18%	0%	0%	8%	15%	15%	24%	23%	29%	18%	30%	23%	17%
Pear	14%	11%	18%	16%	7%	9%	20%	16%	17%	18%	20%	16%	20%	16%
Cherries	15%	20%	15%	23%	6%	9%	9%	18%	18%	14%	15%	18%	13%	15%

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	299	296	293	300	299	296	226	294	299	296	295	40



What does premium quality mean to you?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
Fresher	34%	22%	44%	40%	19%	22%	45%	48%	42%	43%	45%	39%	43%	37%
Sweeter	17%	18%	40%	33%	26%	21%	33%	44%	40%	32%	35%	29%	28%	31%
More flavour	24%	24%	19%	27%	16%	23%	19%	38%	17%	33%	22%	20%	20%	23%
Right state of ripeness	23%	22%	23%	28%	11%	14%	21%	18%	24%	31%	27%	21%	13%	21%
Organic / free from pesticides	13%	17%	23%	30%	9%	14%	26%	16%	19%	28%	29%	18%	15%	20%
Higher in vitamins and minerals	9%	16%	18%	25%	11%	15%	26%	8%	10%	24%	30%	17%	25%	18%
I trust its safety	11%	20%	17%	30%	14%	13%	19%	15%	10%	22%	23%	19%	18%	18%
More appetizing (e.g. not bruised, damaged)	12%	13%	15%	16%	6%	12%	17%	10%	15%	36%	20%	12%	5%	14%
Premium packaging	9%	15%	15%	16%	8%	6%	24%	6%	5%	17%	26%	15%	15%	14%
Lasts longer	12%	15%	14%	19%	3%	4%	16%	10%	4%	25%	23%	17%	13%	13%

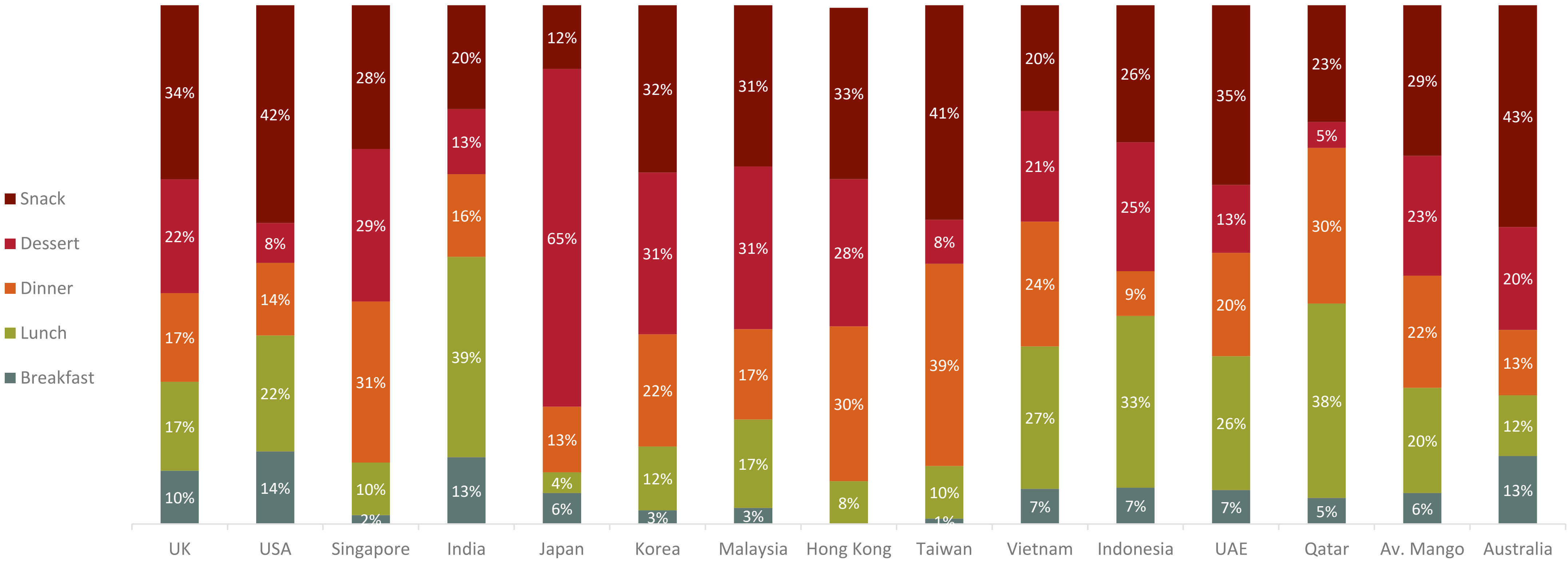
Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	299	296	293	300	299	296	226	294	299	296	295	40

4.7
Mango

Mango

When did you consume?



KANTAR

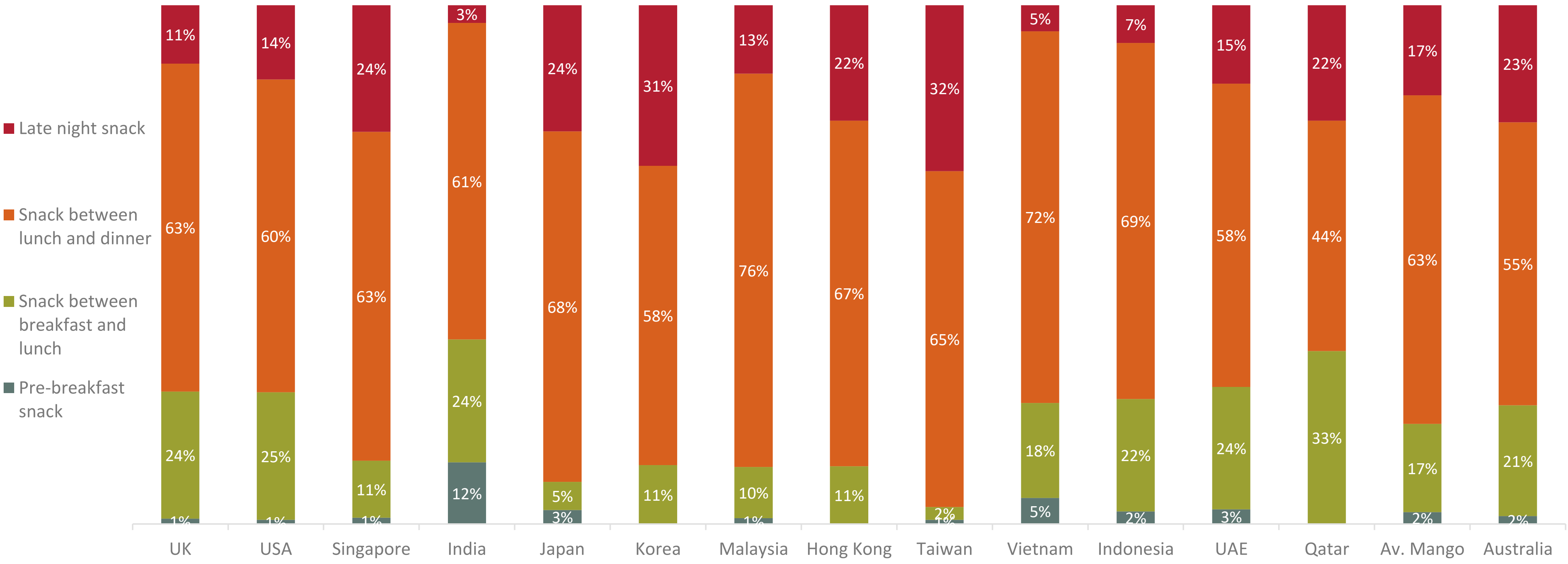
Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	296	295	301	301	293	218	295	295	314	306	40

Hort Innovation

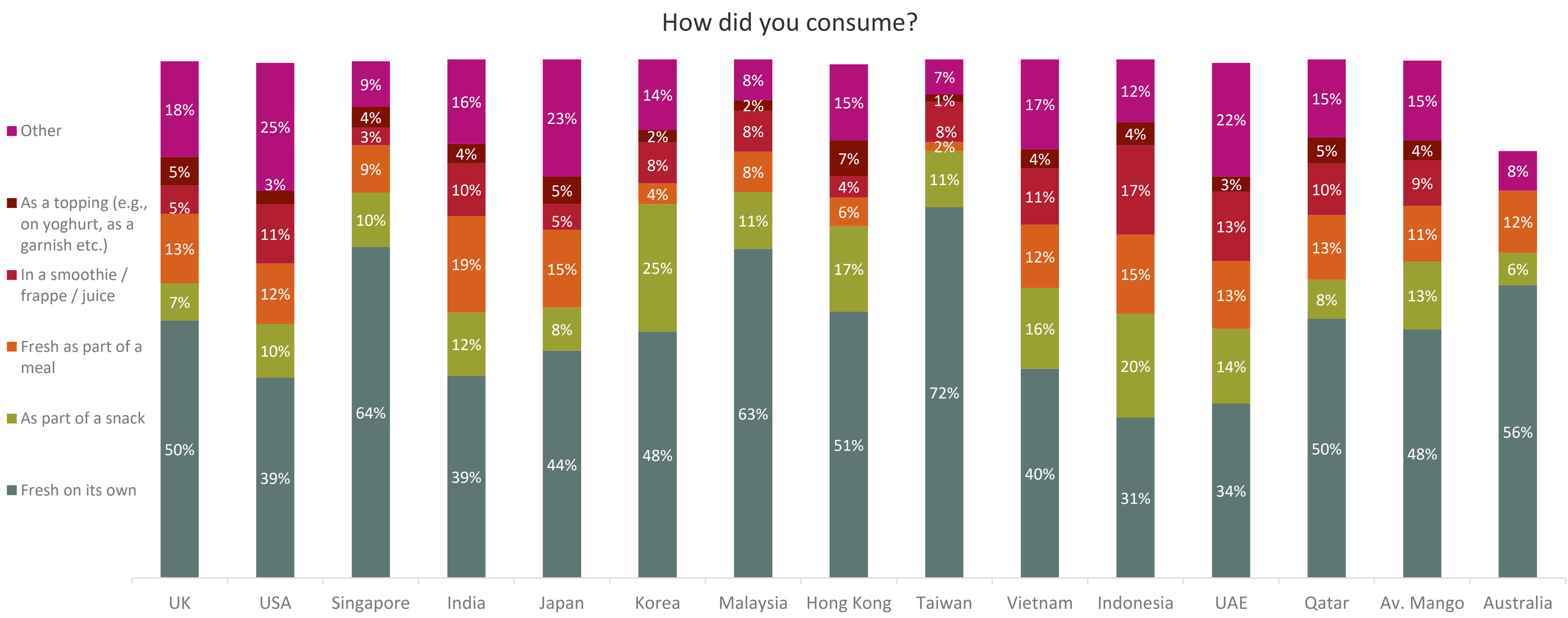
Mango

What kind of snack was it?



Source: Kantar HIA International Demand Study 2023

Mango



'Other' = In a salad, Cooked on its own, As an ingredient in cooking, For decoration / show only, To make baby food / puree, As an ingredient in baking, As part of an alcoholic drink e.g. cocktail and Don't know

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	296	295	301	301	293	218	295	295	314	306	40

KANTAR

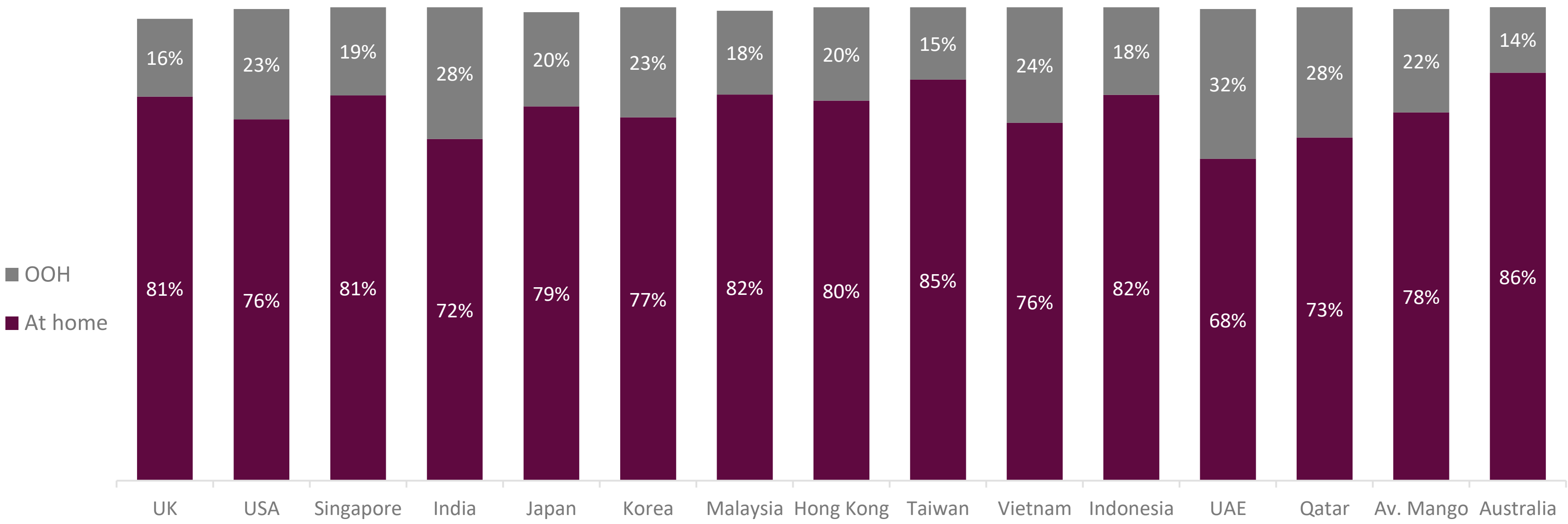
Hort Innovation

Mango

Where were you?

78%

Of consumption of mangoes is in the home, this varies only slightly by market

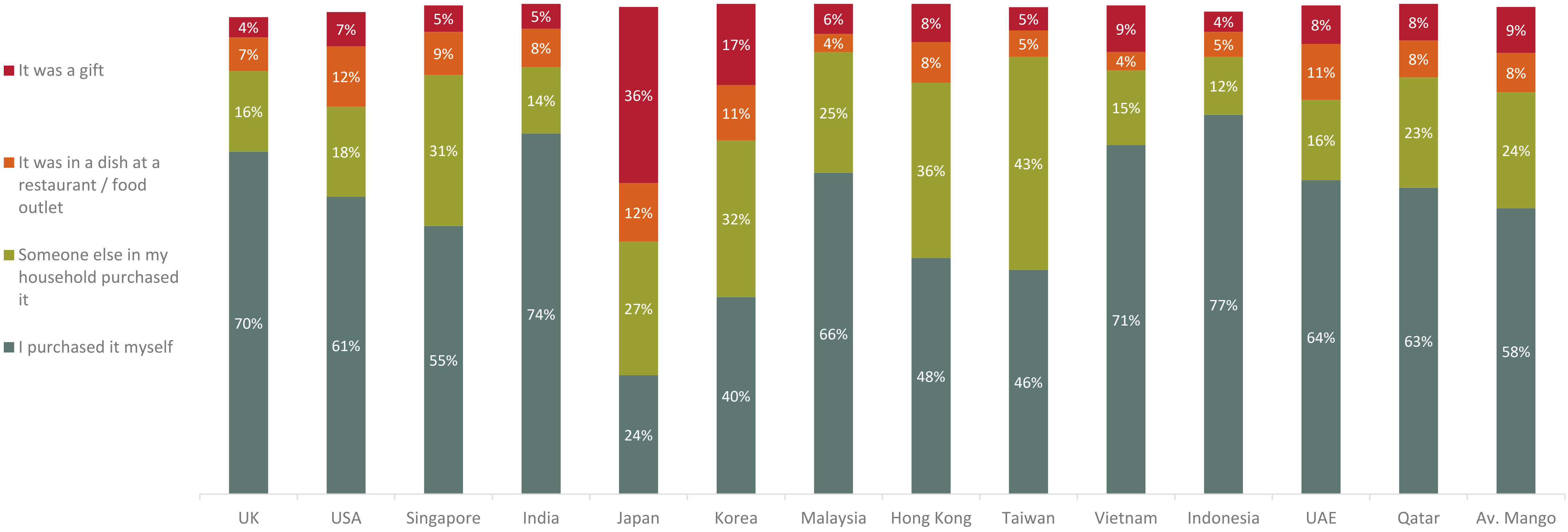


Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	296	295	301	301	293	218	295	295	314	306	40

Mango

Where did you get them from?



Source: Kantar HIA International Demand Study 2023

	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
N=	292	300	296	295	301	301	293	218	295	295	314	306	40

KANTAR

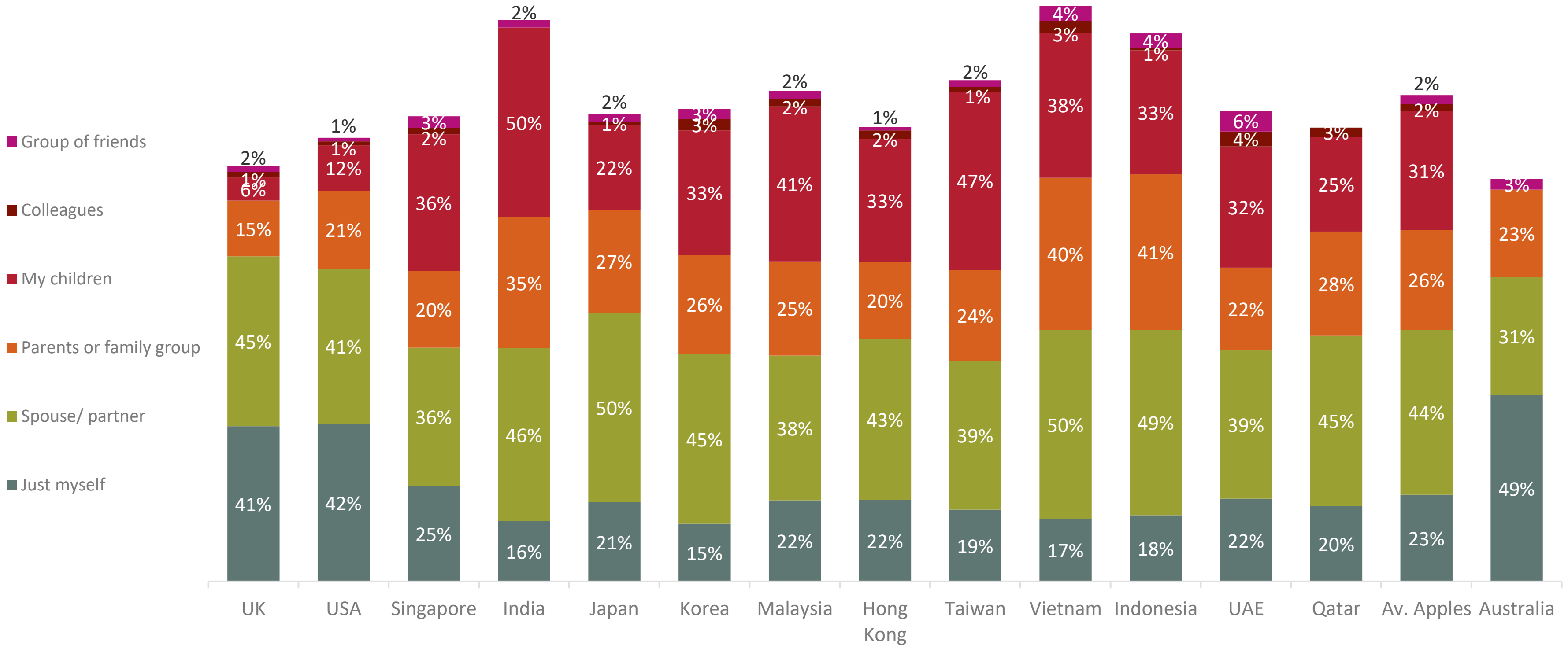
Hort Innovation

Mango

Who were you with?

44%

Of consumption of mangoes (on average) is with a spouse/partner.



Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	296	295	301	301	293	218	295	295	314	306	40

Mango

Which were important when choosing to consume?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av	Aus
Tasty	72%	60%	63%	67%	57%	72%	76%	62%	71%	62%	73%	61%	73%	67%	73%
Quick & Easy	44%	40%	38%	41%	24%	27%	45%	34%	44%	47%	47%	42%	35%	39%	51%
Healthy & Nutritious	27%	36%	23%	31%	10%	13%	29%	17%	11%	38%	45%	33%	15%	25%	27%
Indulgence	32%	43%	45%	48%	27%	28%	50%	37%	52%	47%	43%	51%	63%	44%	37%
Physical & Mental Energy	23%	22%	14%	32%	8%	13%	21%	14%	11%	28%	27%	28%	33%	21%	18%
Connection	23%	27%	28%	42%	20%	37%	24%	21%	17%	42%	38%	35%	28%	29%	20%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	296	295	301	301	293	218	295	295	314	306	40

Hort Innovation

Mango

Which were important when choosing to consume?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av	Aus
Really tasty	47%	37%	38%	44%	44%	43%	43%	48%	59%	43%	35%	36%	53%	44%	56%
Refreshing	47%	32%	36%	38%	15%	30%	46%	11%	9%	20%	48%	32%	40%	31%	43%
To satisfy a craving	14%	23%	25%	24%	4%	7%	24%	20%	30%	17%	17%	30%	40%	21%	15%
Quick and easy	28%	24%	21%	19%	13%	8%	26%	14%	16%	24%	31%	20%	13%	20%	34%
Everyone would eat	12%	9%	16%	21%	9%	28%	27%	22%	20%	23%	23%	18%	23%	19%	13%
Good for sharing	10%	12%	17%	17%	2%	17%	16%	9%	9%	25%	25%	13%	18%	15%	9%
Has the nutrition my mind / body needs	13%	16%	14%	13%	5%	6%	17%	6%	6%	22%	27%	17%	10%	13%	15%
To treat / indulge myself or others	16%	13%	18%	14%	10%	4%	17%	9%	23%	11%	12%	11%	8%	13%	15%
To cheer me up	5%	7%	12%	22%	5%	9%	13%	24%	4%	15%	9%	17%	13%	12%	0%
That helped me relax / unwind	4%	6%	9%	10%	13%	15%	11%	11%	11%	19%	18%	12%	5%	11%	9%

Mango

What were you looking for when you consumed?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
Sweet	34%	35%	47%	35%	49%	55%	51%	47%	49%	30%	40%	38%	40%	42%
Refreshing taste	40%	33%	36%	33%	12%	39%	41%	17%	17%	31%	33%	28%	30%	30%
Fresh / Light	30%	24%	25%	27%	4%	20%	31%	18%	11%	22%	34%	22%	20%	22%
Contains fibre	7%	9%	13%	14%	5%	12%	16%	9%	25%	24%	25%	14%	18%	15%
Good source of minerals & vitamins / Nutritionally dense	9%	12%	17%	17%	9%	7%	17%	8%	12%	14%	24%	15%	20%	14%
Quick / easy to prepare	23%	20%	14%	12%	4%	3%	15%	10%	15%	17%	20%	13%	13%	14%
With a strong, intense flavour	10%	7%	10%	15%	17%	3%	13%	23%	13%	12%	9%	15%	15%	12%
Tangy	9%	15%	8%	9%	2%	3%	9%	24%	39%	12%	5%	8%	8%	12%
Fun / exciting	7%	13%	5%	17%	15%	12%	9%	7%	4%	12%	13%	17%	13%	11%
That is good value for money	10%	9%	10%	16%	3%	4%	11%	14%	11%	11%	8%	9%	15%	10%

Mango

What are the reasons you may not choose?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
It is too expensive	31%	20%	31%	21%	40%	46%	27%	30%	32%	20%	17%	22%	18%	27%
It bruises easily	10%	8%	14%	13%	9%	9%	17%	26%	14%	40%	15%	15%	8%	15%
It is too messy to eat	13%	14%	20%	18%	10%	10%	12%	24%	23%	7%	9%	16%	10%	14%
Quality is often poor	12%	12%	14%	18%	4%	7%	22%	12%	9%	18%	16%	20%	20%	14%
It contains too much sugar	3%	8%	15%	19%	4%	15%	11%	17%	19%	16%	13%	16%	15%	13%
They are never in right state of ripeness when sold in shops	13%	16%	12%	13%	4%	4%	16%	12%	8%	9%	14%	14%	15%	11%
It goes off too quickly / it does not last	10%	7%	11%	13%	7%	5%	13%	11%	11%	24%	14%	10%	8%	11%
There are more exciting alternatives	7%	11%	9%	9%	7%	11%	11%	7%	5%	14%	19%	11%	13%	10%
It is not convenient / ideal for on the go	7%	7%	7%	8%	5%	7%	6%	11%	14%	11%	9%	8%	10%	9%
It takes too long to prepare	7%	9%	10%	11%	1%	3%	6%	6%	9%	9%	15%	8%	3%	7%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	296	295	301	301	293	218	295	295	314	306	40

Hort Innovation

Mango

What else would you typically consider having instead?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
Bananas	35%	33%	40%	42%	16%	22%	41%	27%	33%	37%	45%	33%	40%	34%
Apple	27%	31%	38%	45%	17%	27%	42%	24%	39%	38%	49%	37%	25%	34%
Melon	34%	24%	22%	22%	13%	16%	31%	17%	11%	17%	41%	25%	25%	23%
Strawberries	34%	32%	7%	10%	18%	21%	16%	24%	19%	22%	15%	25%	20%	20%
Pineapple	28%	28%	17%	28%	13%	12%	25%	15%	21%	17%	18%	19%	20%	20%
Papaya	0%	0%	26%	32%	6%	4%	34%	11%	24%	24%	36%	17%	10%	17%
Kiwifruit	15%	13%	19%	18%	15%	14%	17%	15%	29%	17%	10%	13%	23%	17%
Pear	15%	14%	17%	13%	7%	13%	20%	19%	18%	25%	26%	14%	13%	17%
Table Grapes	21%	18%	0%	0%	9%	10%	12%	15%	22%	32%	15%	28%	23%	16%
Citrus fruits (orange, lemon, lime, grapefruit)	16%	18%	15%	16%	6%	13%	16%	12%	18%	16%	22%	13%	3%	14%

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	296	295	301	301	293	218	295	295	314	306	40

Mango

What does premium quality mean to you?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
Fresher	31%	28%	41%	49%	12%	20%	50%	41%	39%	51%	52%	43%	50%	39%
Sweeter	25%	28%	44%	38%	27%	31%	44%	48%	39%	37%	43%	37%	18%	35%
Right state of ripeness	38%	33%	25%	28%	14%	22%	26%	29%	33%	37%	35%	25%	23%	28%
More flavour	29%	23%	21%	35%	15%	24%	18%	44%	24%	33%	29%	24%	20%	26%
Organic / free from pesticides	10%	18%	21%	34%	10%	15%	27%	17%	25%	29%	34%	27%	18%	22%
More appetizing (e.g. not bruised, damaged)	16%	24%	19%	19%	7%	14%	23%	17%	19%	37%	23%	19%	15%	19%
Higher in vitamins and minerals	11%	18%	19%	26%	10%	10%	22%	8%	16%	29%	34%	22%	15%	18%
I trust its safety	8%	16%	12%	30%	14%	9%	17%	11%	15%	22%	25%	23%	28%	18%
Lasts longer	18%	16%	11%	21%	4%	3%	17%	9%	7%	22%	22%	21%	15%	14%
Larger than normal	11%	8%	18%	16%	12%	15%	26%	11%	8%	12%	26%	12%	5%	14%

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	296	295	301	301	293	218	295	295	314	306	40

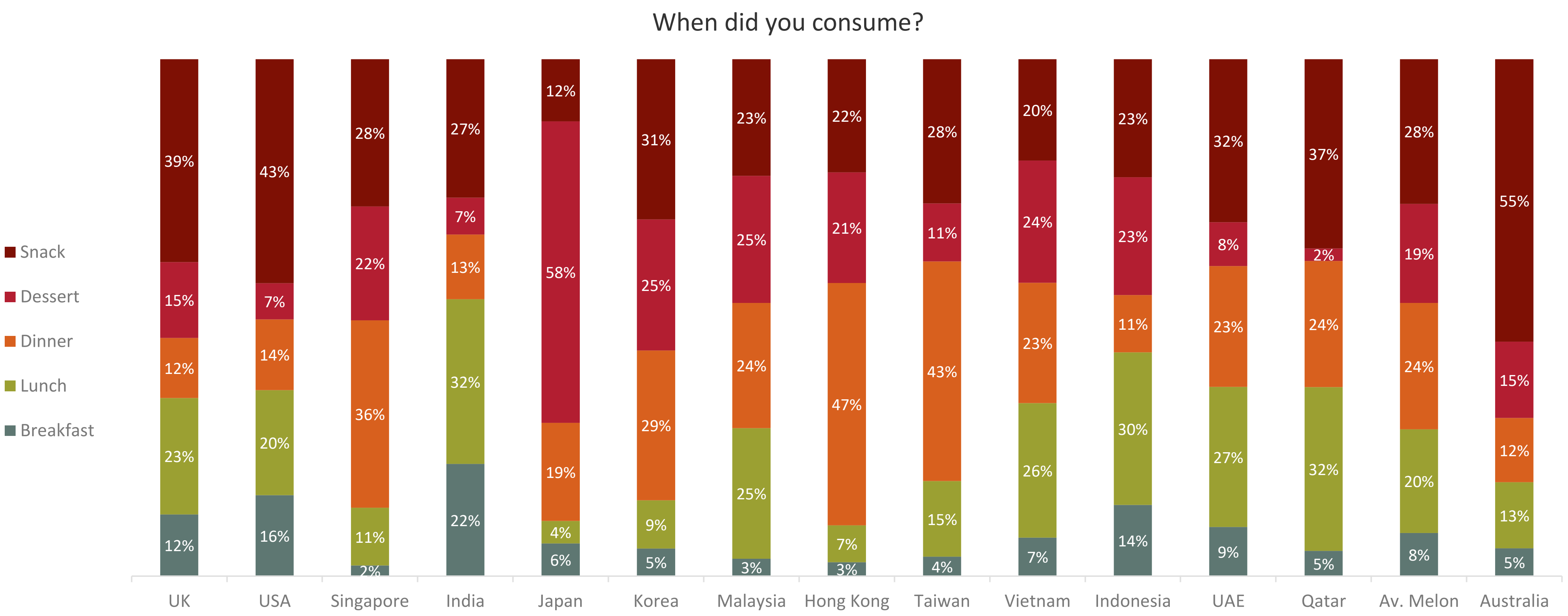
KANTAR

4.8

Melon

Hort Innovation

Melon



KANTAR

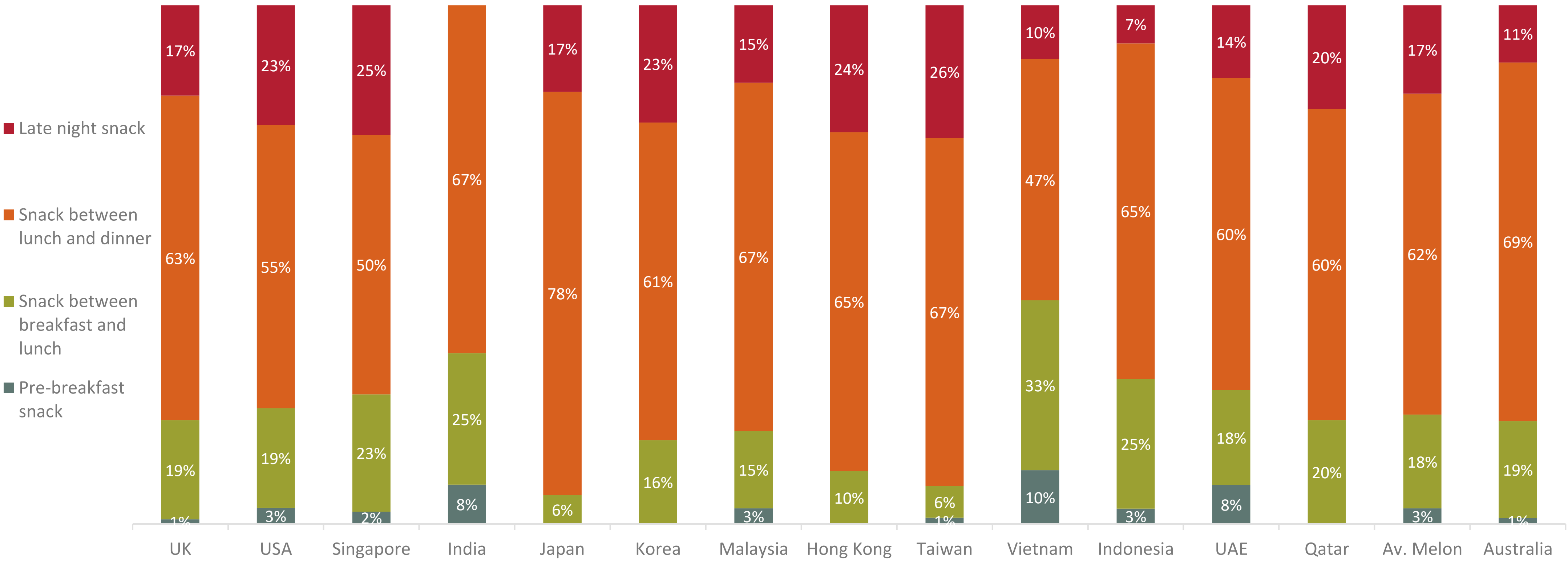
Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	295	295	300	300	297	224	294	296	298	295	41

Hort Innovation

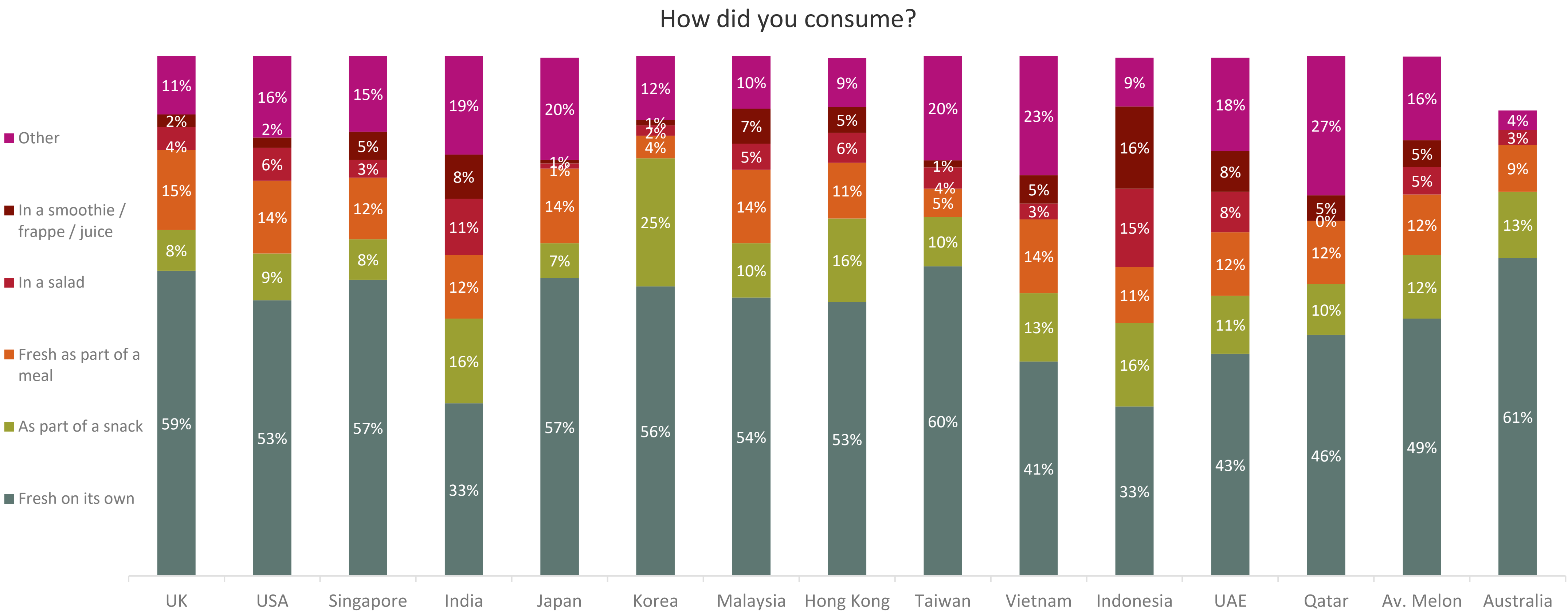
Melon

What kind of snack was it?



Source: Kantar HIA International Demand Study 2023

Melon



'Other' = As an ingredient in cooking, Cooked on its own, As a topping (e.g., on yoghurt, as a garnish etc.), As part of an alcoholic drink e.g. cocktail, For decoration / show only, To make baby food / puree, As and ingredient in baking and Don't know

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	295	295	300	300	297	224	294	296	298	295	41

KANTAR

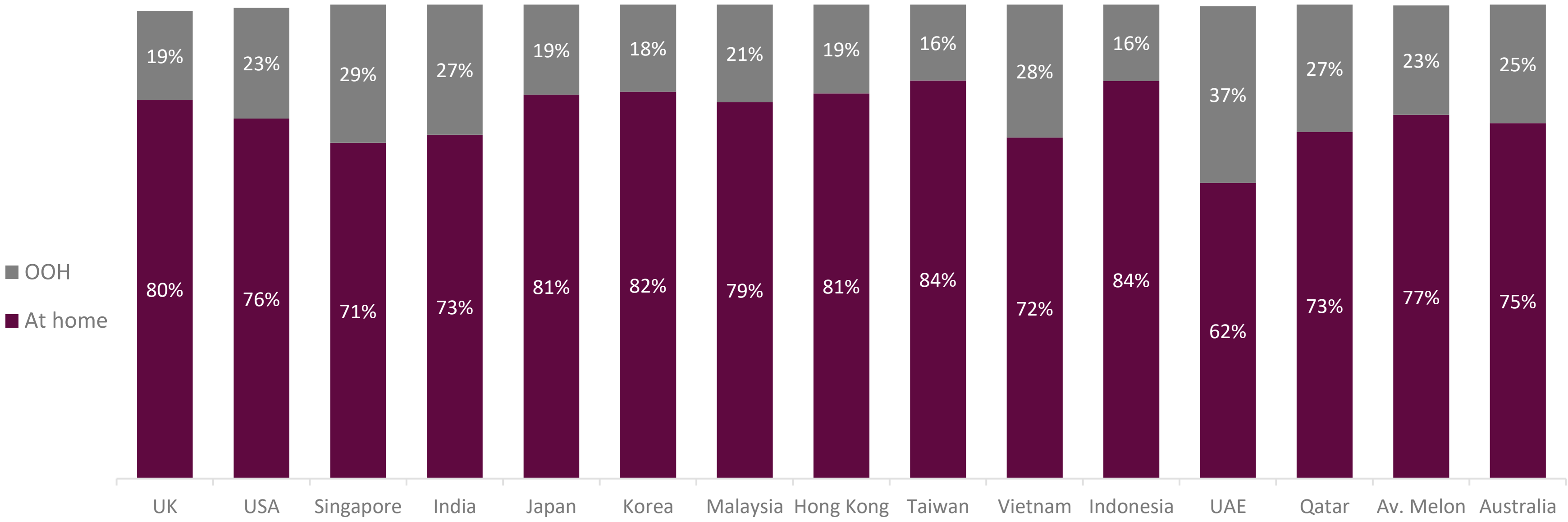
Hort Innovation

Melon

Where were you?

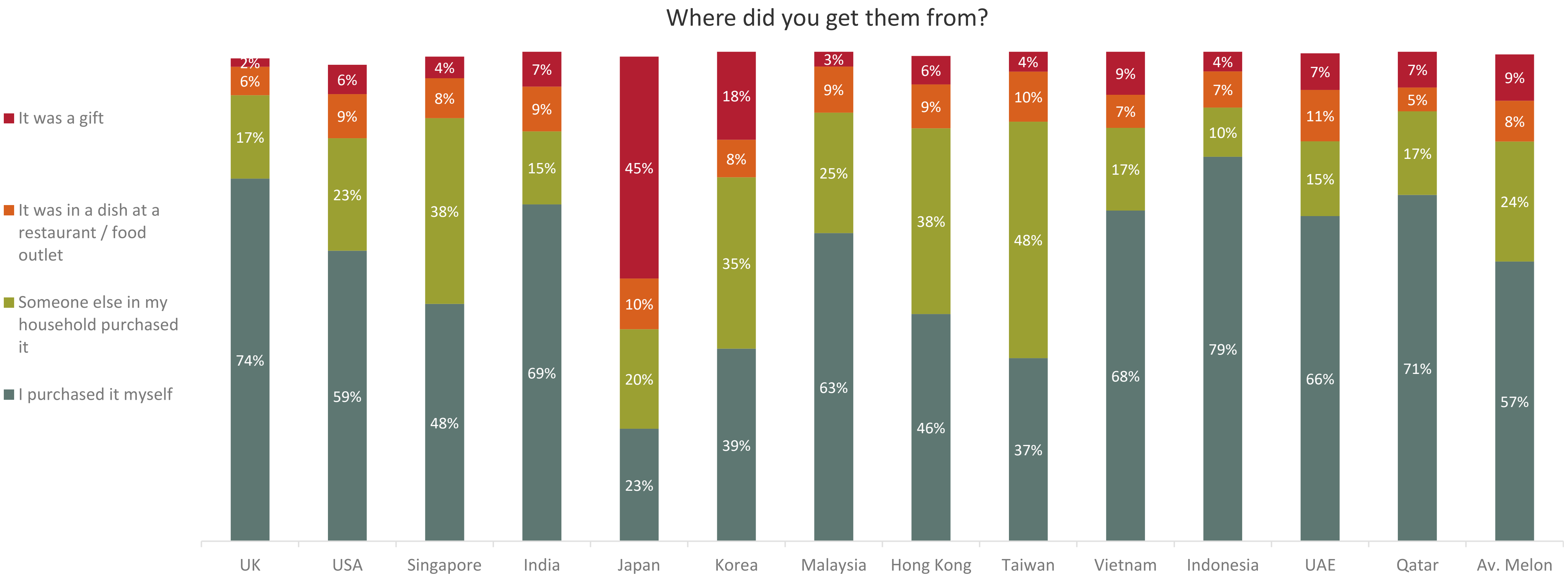
77%

Of consumption of melons is in the home, this varies only slightly by market



Source: Kantar HIA International Demand Study 2023

	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
N=	293	300	295	295	300	300	297	224	294	296	298	295	41



KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	295	295	300	300	297	224	294	296	298	295	41

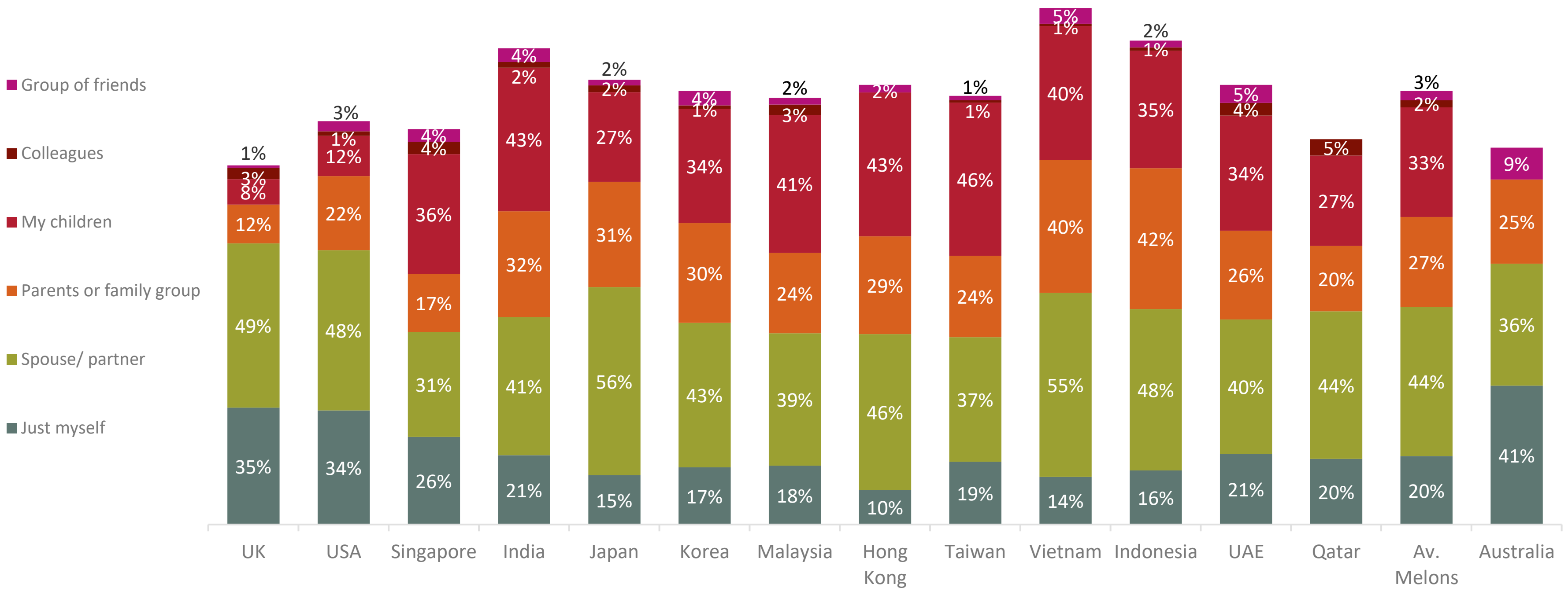
Hort Innovation

Melon

Who were you with?

33%

Of consumption of melons (on average) is with children.



Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	295	295	300	300	297	224	294	296	298	295	41

Melon

Which were important when choosing to consume?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av	Aus
Tasty	69%	66%	58%	66%	66%	70%	72%	68%	56%	60%	72%	62%	61%	65%	75%
Quick & Easy	50%	50%	44%	48%	21%	25%	46%	39%	49%	42%	53%	38%	24%	41%	65%
Healthy & Nutritious	24%	30%	29%	42%	7%	14%	32%	18%	23%	43%	44%	36%	34%	29%	27%
Indulgence	23%	37%	36%	42%	34%	29%	37%	34%	31%	42%	41%	43%	44%	36%	22%
Physical & Mental Energy	18%	27%	24%	37%	4%	18%	21%	20%	19%	30%	27%	33%	34%	24%	22%
Connection	20%	26%	31%	36%	20%	43%	27%	31%	20%	48%	37%	35%	34%	31%	18%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	295	295	300	300	297	224	294	296	298	295	41

Hort Innovation

Melon

Which were important when choosing to consume?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av	Aus
Really tasty	40%	44%	28%	30%	51%	41%	37%	48%	40%	36%	34%	36%	34%	38%	34%
Refreshing	54%	36%	35%	41%	17%	24%	48%	22%	9%	23%	50%	36%	44%	34%	56%
Quick and easy	38%	32%	23%	25%	12%	8%	28%	17%	16%	23%	36%	20%	10%	22%	43%
Everyone would eat	10%	14%	21%	18%	12%	30%	23%	27%	19%	25%	20%	17%	10%	19%	14%
Good for sharing	14%	15%	21%	19%	2%	29%	19%	15%	13%	24%	24%	16%	12%	17%	10%
To satisfy a craving	11%	20%	19%	16%	9%	7%	17%	15%	11%	15%	10%	19%	24%	15%	11%
Has the nutrition my mind / body needs	9%	16%	14%	20%	3%	8%	21%	8%	13%	16%	28%	14%	22%	15%	10%
That helped me relax / unwind	3%	5%	8%	15%	16%	17%	14%	9%	12%	18%	19%	9%	17%	13%	7%
Already available at home / work etc.	10%	17%	11%	14%	1%	9%	11%	13%	15%	11%	13%	10%	10%	11%	17%
That does not require much thought	10%	11%	10%	7%	8%	9%	9%	14%	29%	10%	8%	8%	5%	11%	14%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	295	295	300	300	297	224	294	296	298	295	41

Hort Innovation

Melon

What were you looking for when you consumed?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
Sweet	30%	36%	35%	21%	62%	57%	36%	46%	38%	23%	34%	29%	34%	37%
Refreshing taste	49%	40%	31%	30%	22%	43%	39%	21%	13%	31%	36%	35%	17%	31%
Fresh / Light	34%	34%	26%	30%	8%	25%	35%	26%	15%	15%	40%	24%	27%	26%
Quick / easy to prepare	22%	20%	14%	15%	4%	4%	19%	12%	16%	10%	19%	12%	15%	14%
Contains fibre	3%	8%	12%	18%	5%	11%	16%	15%	20%	16%	16%	11%	12%	12%
To aid digestion	2%	6%	13%	14%	1%	10%	16%	13%	22%	19%	18%	16%	10%	12%
Good source of minerals & vitamins / Nutritionally dense	7%	10%	13%	20%	6%	5%	16%	11%	12%	13%	20%	16%	7%	12%
Low in fat	18%	14%	9%	16%	1%	3%	11%	8%	4%	11%	12%	14%	15%	11%
That is good value for money	14%	12%	9%	12%	3%	5%	8%	17%	7%	13%	11%	9%	15%	10%
With a light, mild taste	11%	10%	8%	11%	3%	9%	6%	11%	9%	23%	11%	9%	10%	10%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	295	295	300	300	297	224	294	296	298	295	41

Hort Innovation

Melon

What are the reasons you may not choose?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
It is too expensive	25%	19%	23%	15%	50%	46%	29%	42%	28%	25%	18%	13%	15%	27%
There are more exciting alternatives	10%	11%	12%	15%	9%	11%	15%	8%	9%	17%	25%	14%	20%	13%
It is too messy to eat	11%	10%	11%	15%	11%	10%	12%	18%	14%	12%	8%	13%	15%	12%
Quality is often poor	7%	14%	13%	17%	3%	7%	15%	12%	11%	17%	15%	14%	7%	12%
It goes off too quickly / it does not last	13%	12%	7%	13%	7%	4%	7%	10%	6%	21%	11%	13%	15%	11%
They are never in the right state of ripeness when sold in shops	11%	17%	11%	13%	5%	6%	13%	8%	9%	8%	11%	16%	7%	10%
It bruises easily	4%	7%	5%	7%	5%	4%	9%	9%	10%	32%	11%	14%	17%	10%
It contains too much sugar	2%	7%	11%	14%	4%	11%	13%	17%	18%	9%	10%	10%	2%	10%
The quantity is more than I typically need	12%	9%	11%	14%	4%	8%	7%	8%	6%	14%	9%	17%	5%	10%
It is not convenient / ideal for on the go	8%	9%	11%	9%	4%	5%	9%	13%	13%	11%	10%	5%	12%	9%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	295	295	300	300	297	224	294	296	298	295	41

Hort Innovation

Melon

What else would you typically consider having instead?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
Apple	28%	32%	35%	44%	16%	28%	45%	23%	37%	30%	41%	32%	29%	32%
Bananas	33%	32%	31%	37%	14%	20%	33%	23%	28%	21%	43%	29%	37%	29%
Mango	16%	16%	28%	34%	10%	12%	37%	19%	20%	24%	44%	27%	24%	24%
Strawberries	30%	27%	7%	9%	21%	20%	14%	23%	11%	17%	18%	23%	15%	18%
Pineapple	22%	19%	17%	25%	14%	15%	18%	13%	12%	11%	13%	21%	24%	17%
Pear	17%	11%	13%	15%	8%	15%	21%	15%	22%	18%	29%	13%	17%	16%
Papaya	0%	0%	25%	32%	3%	2%	32%	12%	17%	18%	38%	16%	0%	15%
Table Grapes	23%	23%	0%	0%	8%	14%	15%	17%	17%	20%	11%	24%	15%	14%
Citrus fruits (orange, lemon, lime, grapefruit)	15%	14%	13%	16%	9%	10%	17%	14%	18%	14%	15%	11%	12%	14%
Kiwifruit	11%	9%	17%	16%	16%	14%	14%	17%	22%	10%	7%	15%	5%	13%

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	295	295	300	300	297	224	294	296	298	295	41

Melon

What does premium quality mean to you?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
Fresher	32%	34%	38%	44%	15%	23%	48%	45%	35%	40%	49%	41%	37%	37%
Sweeter	27%	38%	38%	29%	36%	31%	35%	47%	46%	30%	37%	34%	22%	35%
More flavour	32%	35%	24%	25%	27%	25%	18%	44%	15%	29%	25%	25%	22%	27%
Right state of ripeness	35%	31%	25%	25%	14%	24%	23%	29%	29%	28%	27%	26%	12%	25%
Organic / free from pesticides	14%	17%	23%	35%	11%	10%	23%	13%	26%	30%	32%	30%	17%	22%
Higher in vitamins and minerals	11%	12%	16%	27%	4%	7%	22%	11%	16%	26%	35%	22%	15%	17%
I trust its safety	5%	15%	12%	25%	16%	12%	19%	11%	15%	23%	27%	25%	7%	16%
More appetizing (e.g. not bruised, damaged)	19%	17%	12%	17%	6%	9%	20%	16%	15%	32%	16%	14%	10%	16%
Locally grown / produced in my area	5%	22%	9%	25%	24%	5%	11%	3%	15%	12%	16%	19%	17%	14%
Premium packaging	4%	8%	16%	14%	13%	11%	18%	7%	9%	16%	24%	10%	10%	12%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	295	295	300	300	297	224	294	296	298	295	41

Hort Innovation

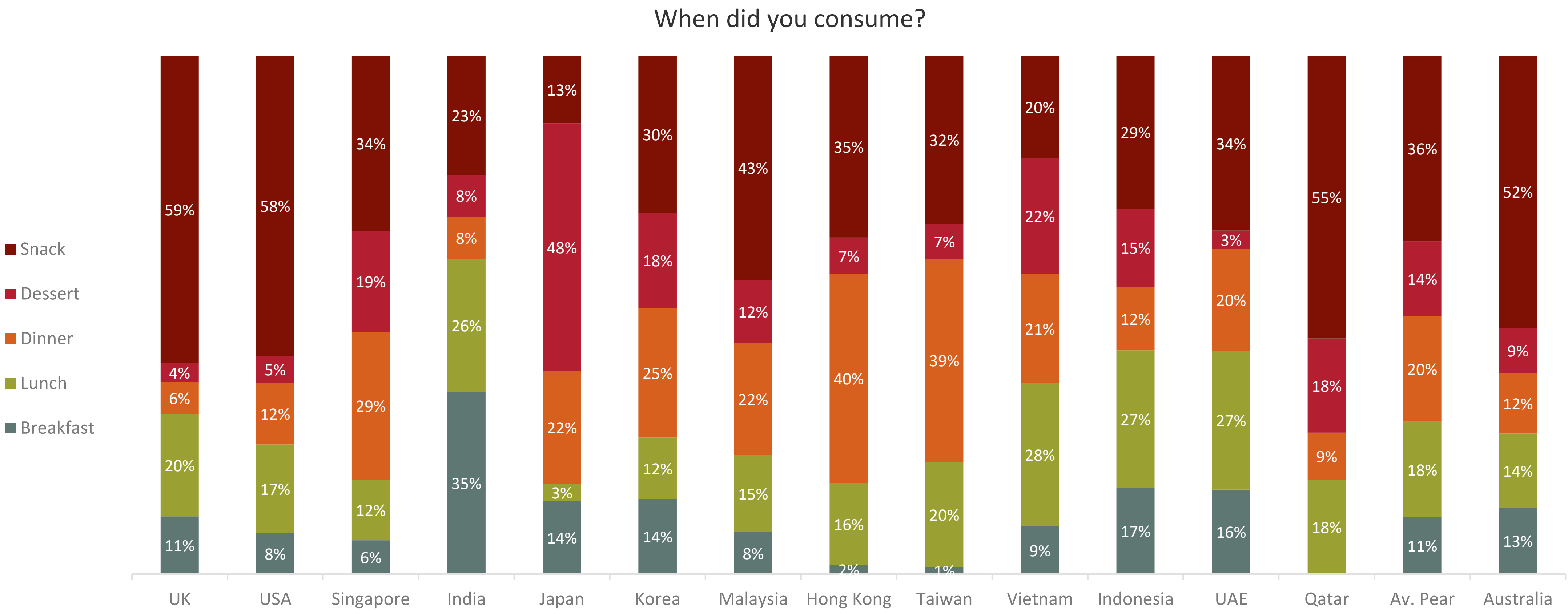
KANTAR

4.9

Pear

Hort Innovation

Pear



KANTAR

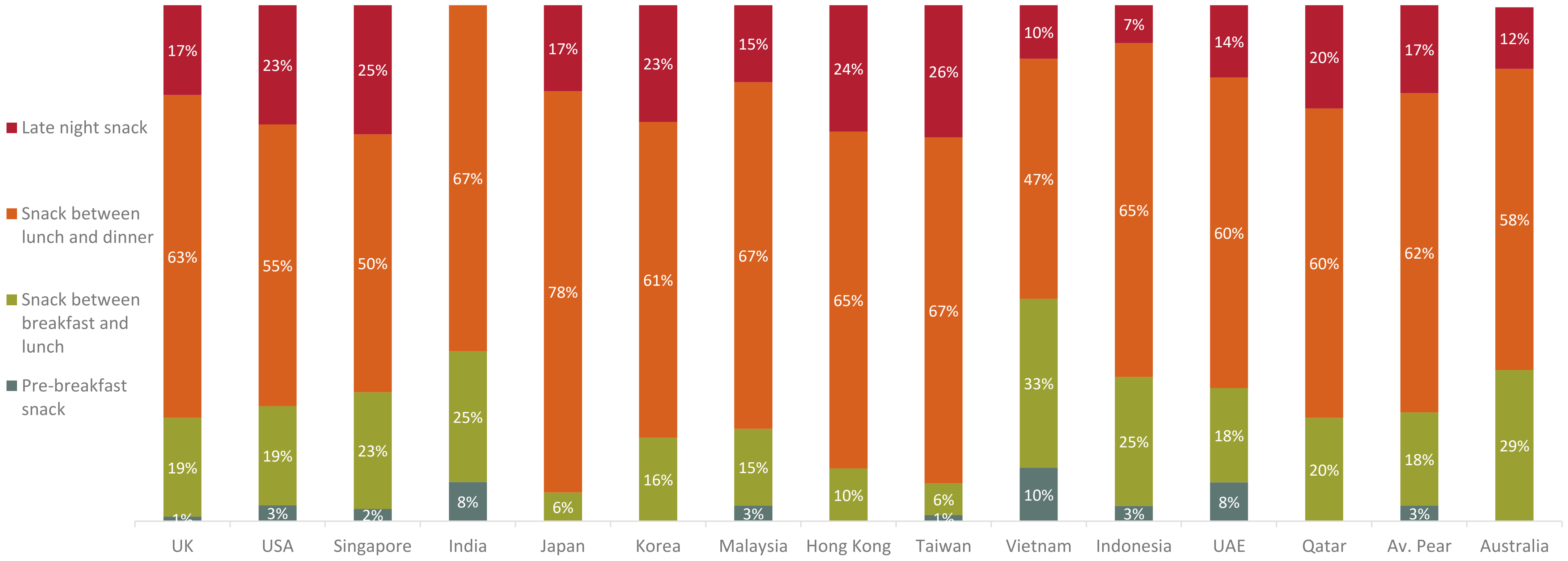
Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	81	76	77	74	92	76	74	57	74	76	139	86	11*

*Caution: Low Base

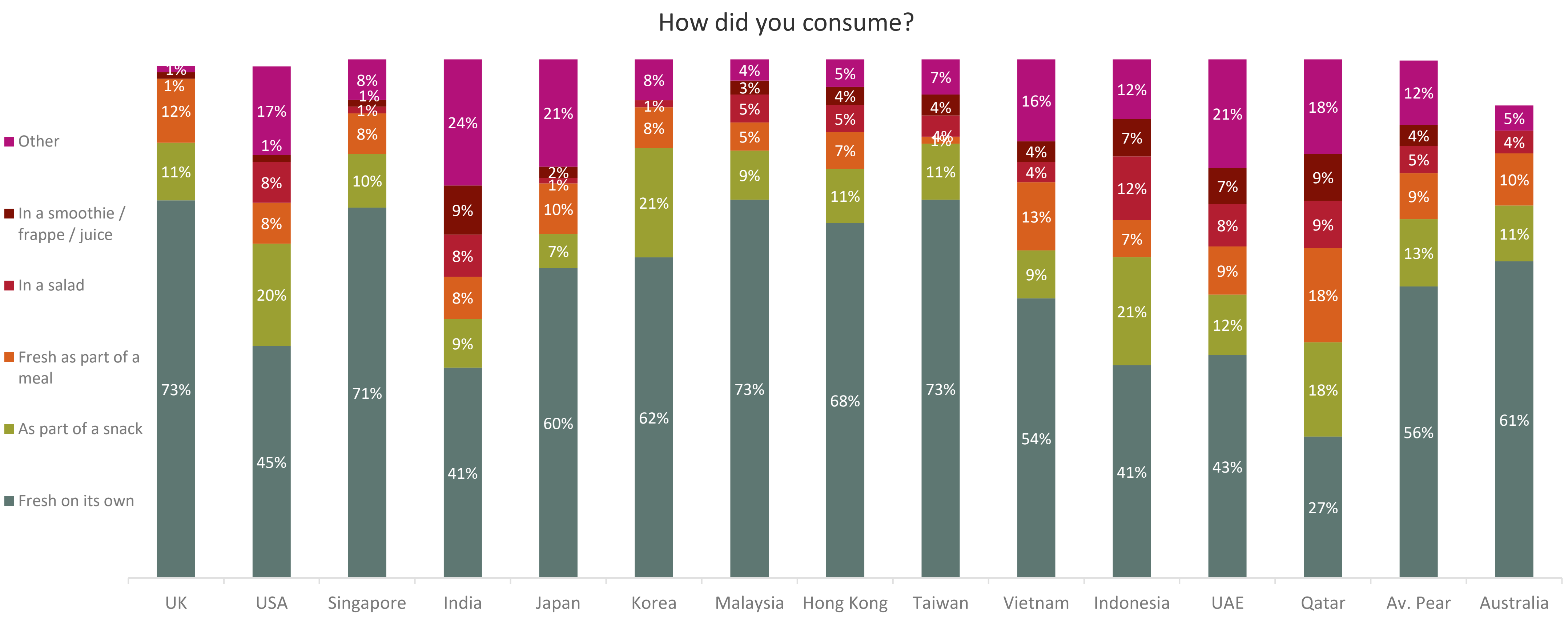
Hort Innovation

What kind of snack was it?



Source: Kantar HIA International Demand Study 2023

Pear



'Other' = Cooked on its own, To make baby food / puree, As an ingredient in cooking, As a topping (e.g., on yoghurt, as a garnish etc.), As part of an alcoholic drink e.g. cocktail, As an ingredient in baking, For decoration / show only and Don't know

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	81	76	77	74	92	76	74	57	74	76	139	86	11*

*Caution: Low Base

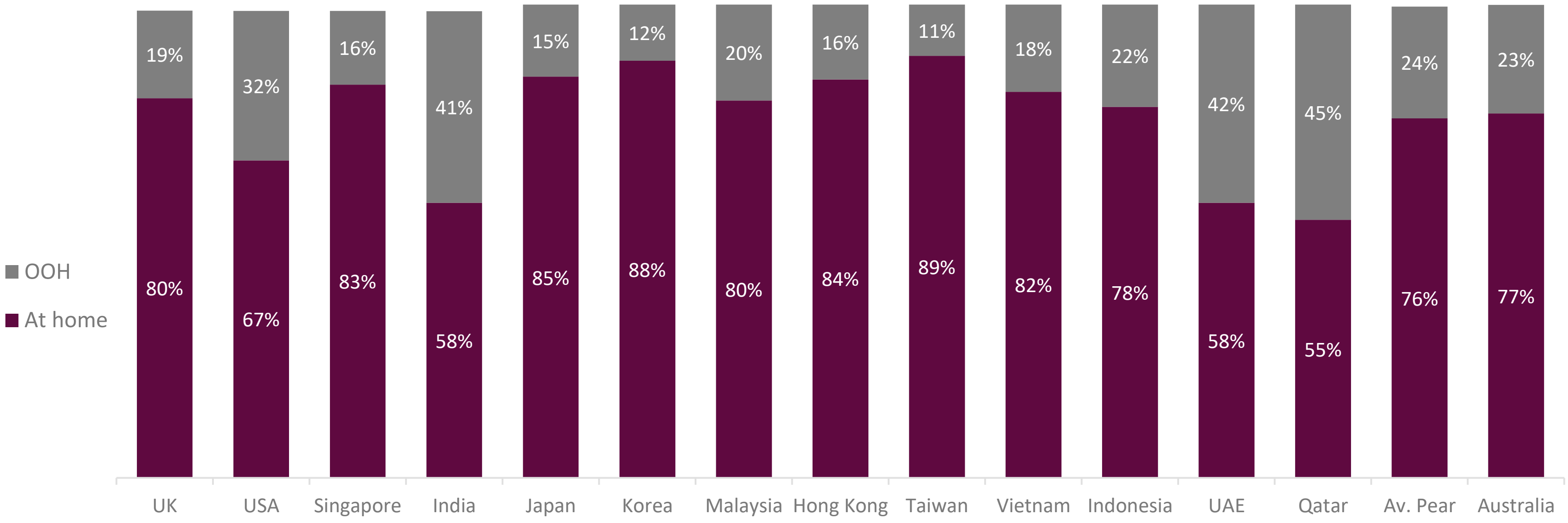
KANTAR

Hort Innovation

Pear

Where were you?

76%



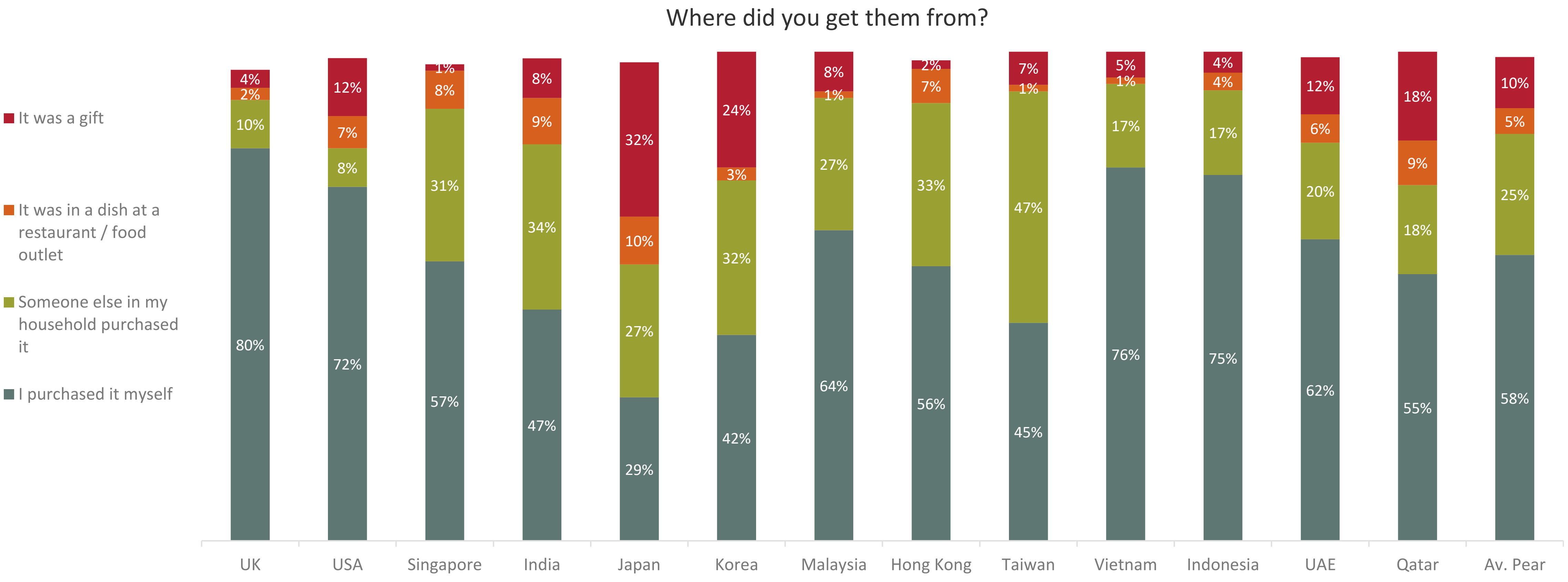
Of consumption of pears is in the home, this varies only slightly by market

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	81	76	77	74	92	76	74	57	74	76	139	86	11*

*Caution: Low Base

Pear



Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	81	76	77	74	92	76	74	57	74	76	139	86	11*

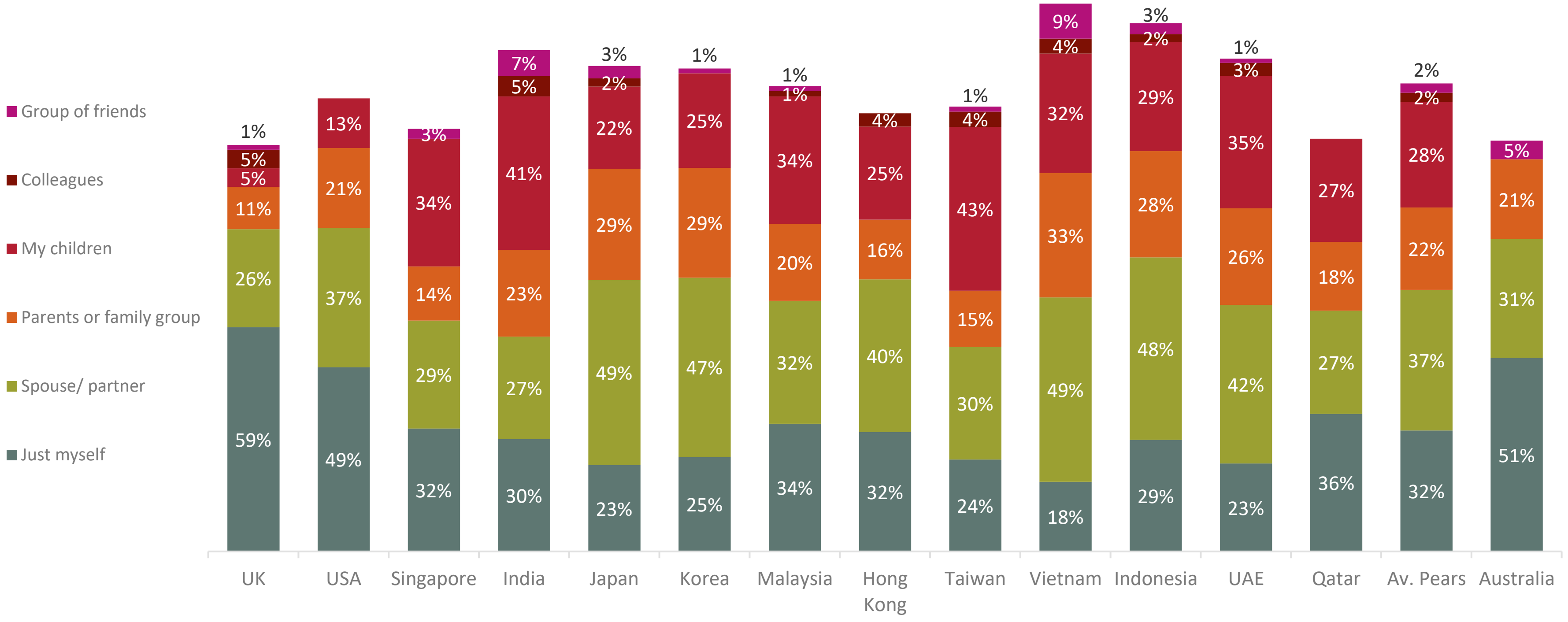
*Caution: Low Base

Pear

Who were you with?

32%

Of consumption of pears (on average) is alone.



	Just myself	Spouse/ partner	Parents or family group	My children	Colleagues	Group of friends
UK	59%	26%	11%	5%	5%	1%
USA	49%	37%	21%	13%		
Singapore	32%	29%	14%	34%		3%
India	30%	27%	23%	41%	5%	7%
Japan	23%	49%	29%	22%	2%	3%
Korea	25%	47%	29%	25%		1%
Malaysia	34%	32%	20%	34%	1%	1%
Hong Kong	32%	40%	16%	25%	4%	
Taiwan	24%	30%	15%	43%	4%	1%
Vietnam	18%	49%	33%	32%	4%	9%
Indonesia	29%	48%	28%	29%	2%	3%
UAE	23%	42%	26%	35%	3%	1%
Qatar	36%	27%	18%	27%		
Av. Pears	32%	37%	22%	28%	2%	2%
Australia	51%	31%	21%			5%

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	81	76	77	74	92	76	74	57	74	76	139	86	11*

Pear

Which were important when choosing to consume?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av	Aus
Tasty	59%	70%	58%	54%	54%	59%	68%	61%	69%	59%	71%	59%	45%	61%	63%
Quick & Easy	53%	50%	48%	43%	28%	38%	55%	54%	42%	43%	45%	45%	27%	44%	66%
Healthy & Nutritious	22%	20%	31%	43%	13%	16%	31%	28%	34%	43%	49%	44%	36%	32%	30%
Indulgence	19%	36%	40%	42%	28%	28%	35%	21%	27%	36%	38%	34%	36%	32%	25%
Physical & Mental Energy	36%	28%	27%	53%	9%	24%	39%	23%	22%	22%	32%	30%	45%	30%	30%
Connection	5%	17%	18%	35%	25%	32%	19%	18%	14%	51%	37%	35%	18%	25%	13%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	81	76	77	74	92	76	74	57	74	76	139	86	11*

*Caution: Low Base

Hort Innovation

Pear

Which were important when choosing to consume?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av	Aus
Really tasty	36%	46%	18%	32%	47%	30%	28%	35%	45%	34%	35%	26%	45%	35%	41%
Refreshing	36%	41%	38%	24%	17%	17%	46%	30%	14%	20%	40%	34%	27%	29%	36%
Quick and easy	44%	33%	19%	11%	16%	12%	31%	23%	16%	21%	28%	20%	9%	22%	40%
Everyone would eat	6%	12%	18%	12%	4%	30%	24%	21%	32%	26%	19%	13%	18%	18%	9%
Has the nutrition my mind / body needs	15%	5%	25%	18%	11%	7%	16%	11%	15%	24%	27%	26%	27%	17%	18%
To stop me feeling hungry	25%	13%	18%	19%	4%	13%	28%	14%	15%	5%	17%	15%	18%	16%	16%
Already available at home / work etc.	11%	21%	19%	15%	0%	17%	16%	26%	11%	16%	9%	10%	18%	15%	20%
Good for sharing	4%	11%	13%	12%	3%	28%	15%	7%	11%	30%	22%	15%	9%	14%	6%
That helped me relax / unwind	1%	4%	13%	20%	17%	18%	14%	12%	14%	11%	15%	10%	9%	12%	6%
To satisfy a craving	12%	20%	21%	18%	7%	5%	16%	5%	5%	8%	14%	14%	9%	12%	11%

Pear

What were you looking for when you consumed?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
Sweet	38%	36%	34%	19%	46%	41%	39%	35%	35%	29%	34%	24%	36%	34%
Refreshing taste	38%	36%	27%	22%	24%	49%	30%	23%	16%	34%	33%	22%	9%	28%
Fresh / Light	33%	29%	29%	16%	4%	30%	31%	33%	20%	16%	43%	16%	18%	25%
Contains fibre	10%	12%	16%	14%	8%	14%	15%	14%	34%	22%	22%	12%	18%	16%
To aid digestion	4%	9%	9%	7%	2%	30%	14%	32%	31%	17%	9%	10%	9%	14%
Crunchy	6%	8%	27%	5%	14%	5%	24%	16%	9%	18%	16%	10%	9%	13%
Quick / easy to prepare	23%	14%	16%	8%	4%	4%	19%	14%	18%	11%	11%	13%	0%	12%
Good source of minerals & vitamins / Nutritionally dense	9%	9%	16%	11%	5%	3%	14%	9%	18%	16%	18%	20%	0%	11%
With a light, mild taste	2%	14%	10%	14%	3%	11%	8%	16%	7%	26%	12%	10%	9%	11%
Filling	5%	13%	5%	15%	8%	21%	15%	5%	11%	7%	7%	13%	0%	10%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	81	76	77	74	92	76	74	57	74	76	139	86	11*

*Caution: Low Base

Hort Innovation

Pear

What are the reasons you may not choose?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
It is too expensive	12%	17%	25%	15%	25%	36%	30%	21%	38%	20%	18%	10%	36%	23%
It bruises easily	20%	18%	19%	15%	11%	7%	20%	23%	19%	38%	14%	17%	9%	18%
There are more exciting alternatives	6%	21%	21%	24%	14%	16%	22%	5%	9%	24%	19%	16%	0%	15%
Quality is often poor	10%	22%	10%	15%	2%	5%	23%	14%	15%	13%	17%	17%	0%	13%
It goes off too quickly / it does not last	15%	9%	9%	14%	15%	8%	7%	9%	14%	14%	9%	9%	9%	11%
They are never in the right state of ripeness when sold In shops	20%	12%	12%	15%	4%	1%	8%	14%	3%	12%	10%	9%	0%	9%
The quantity is more than I typically need	4%	4%	4%	12%	4%	11%	1%	9%	12%	12%	8%	10%	18%	8%
It contains too much sugar	2%	7%	8%	22%	2%	7%	4%	16%	12%	11%	9%	10%	0%	8%
Not enough people in my household like it/them	5%	14%	10%	7%	4%	5%	7%	5%	4%	14%	8%	19%	0%	8%
I don't really like the texture	7%	5%	8%	11%	9%	7%	9%	9%	3%	5%	9%	8%	9%	8%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	81	76	77	74	92	76	74	57	74	76	139	86	11*

*Caution: Low Base

Hort Innovation

Pear

What else would you typically consider having instead?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
Apple	49%	43%	42%	53%	37%	47%	62%	60%	55%	42%	55%	34%	27%	47%
Bananas	59%	37%	45%	38%	21%	22%	50%	33%	41%	37%	48%	36%	18%	37%
Mango	5%	13%	35%	34%	9%	4%	45%	19%	24%	29%	42%	28%	18%	23%
Melon	23%	21%	29%	27%	8%	7%	28%	33%	4%	29%	39%	19%	0%	20%
Strawberries	21%	33%	9%	16%	11%	21%	16%	32%	9%	26%	15%	24%	27%	20%
Citrus fruits (orange, lemon, lime, grapefruit)	14%	13%	21%	19%	8%	13%	22%	18%	27%	20%	13%	20%	36%	19%
Kiwifruit	11%	12%	23%	24%	13%	9%	27%	21%	30%	17%	18%	17%	18%	19%
Table Grapes	28%	26%	0%	0%	13%	8%	19%	30%	18%	30%	11%	34%	18%	18%
Papaya	0%	0%	32%	31%	1%	1%	39%	9%	20%	18%	32%	14%	9%	16%
Pineapple	15%	16%	12%	30%	12%	8%	19%	14%	15%	13%	12%	21%	18%	16%

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	81	76	77	74	92	76	74	57	74	76	139	86	11*

*Caution: Low Base

Pear

What does premium quality mean to you?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
Fresher	42%	42%	40%	39%	25%	37%	57%	49%	57%	49%	49%	35%	36%	43%
Sweeter	23%	36%	40%	19%	25%	34%	32%	54%	59%	38%	36%	20%	18%	34%
More flavour	20%	28%	16%	22%	24%	30%	22%	53%	9%	24%	28%	24%	27%	25%
Right state of ripeness	38%	30%	19%	20%	23%	12%	26%	26%	30%	36%	22%	33%	9%	25%
I trust its safety	7%	20%	12%	28%	13%	11%	15%	18%	18%	30%	33%	23%	45%	21%
More appetizing (e.g. not bruised, damaged)	19%	21%	25%	22%	7%	13%	19%	16%	20%	46%	24%	20%	9%	20%
Organic / free from pesticides	14%	11%	13%	30%	14%	22%	24%	16%	24%	30%	34%	26%	0%	20%
Higher in vitamins and minerals	5%	16%	22%	27%	10%	8%	22%	9%	15%	28%	34%	23%	18%	18%
Locally grown / produced in my area	23%	22%	13%	18%	11%	14%	9%	11%	20%	7%	17%	17%	9%	15%
Lasts longer	10%	17%	16%	26%	5%	8%	12%	9%	3%	26%	18%	21%	9%	14%

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	81	76	77	74	92	76	74	57	74	76	139	86	11*

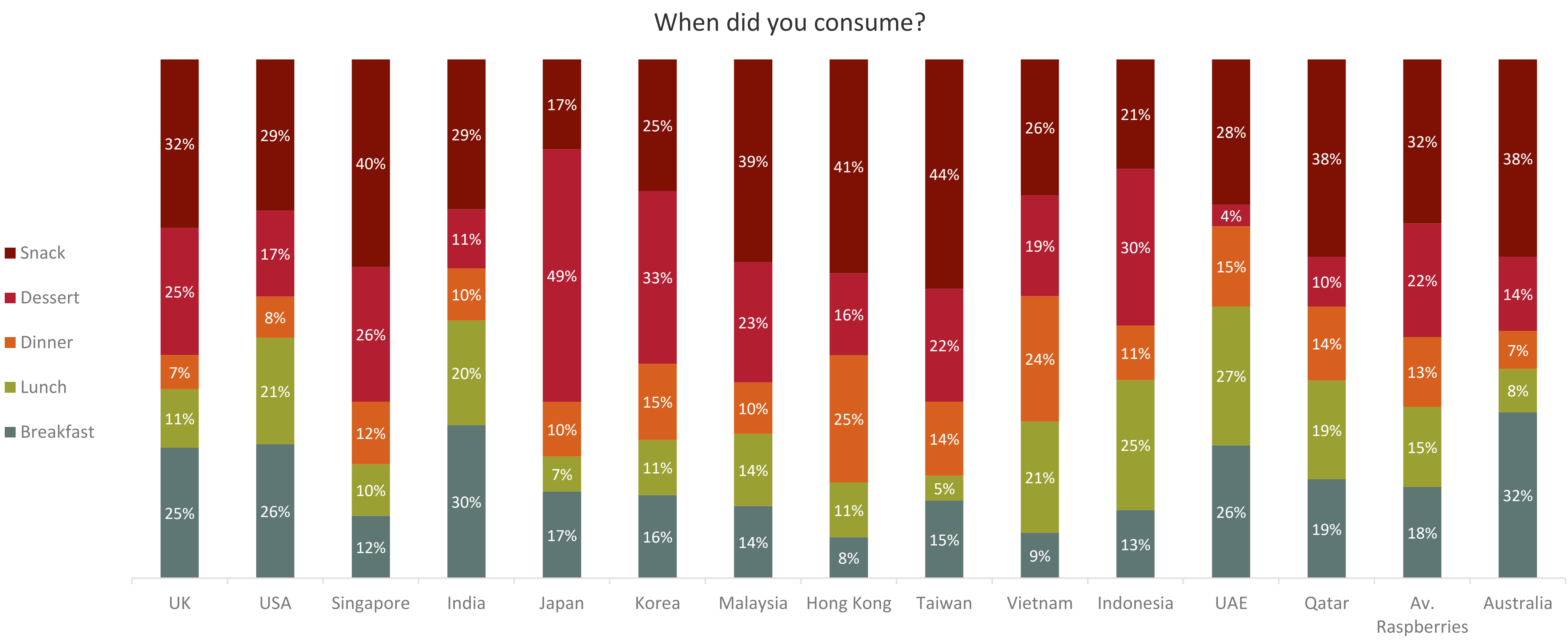
*Caution: Low Base

KANTAR

4.10
Raspberries

Hort Innovation

Raspberries



KANTAR

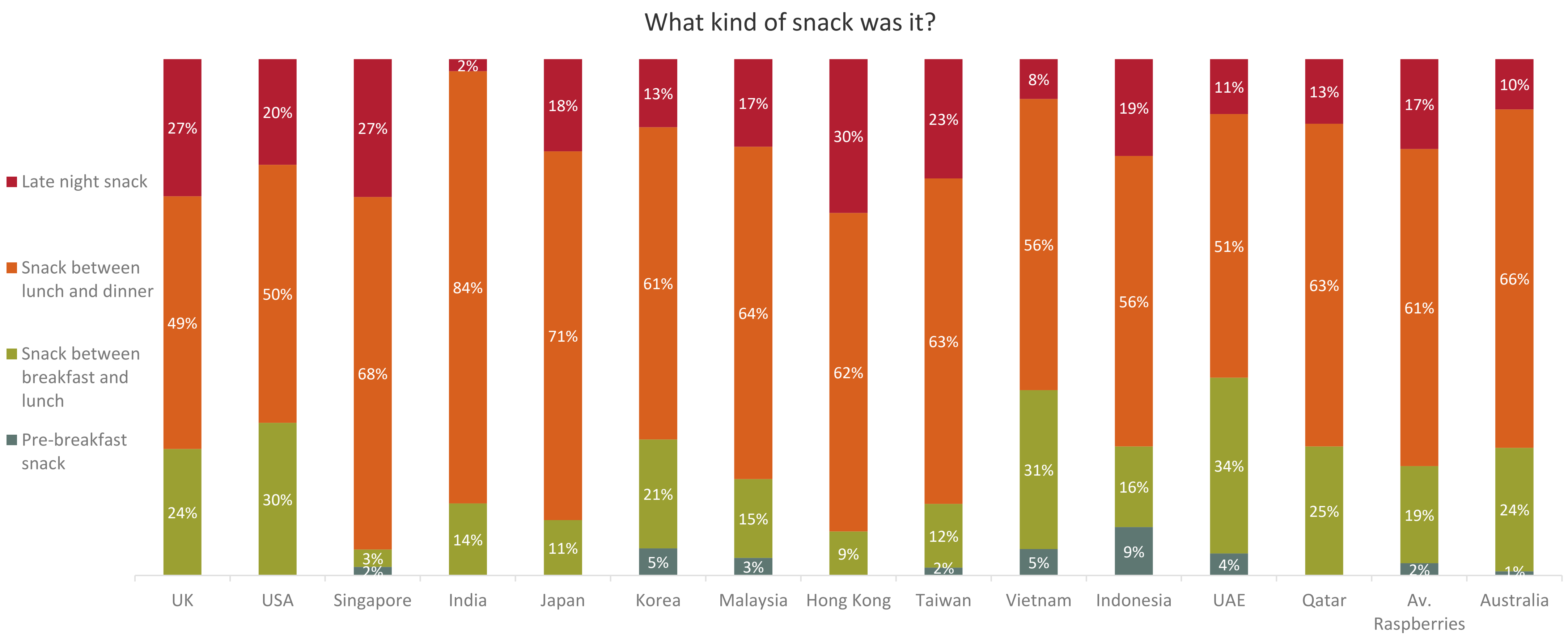
Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	151	151	150	149	162	150	151	114	147	149	152	168	21*

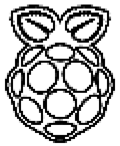
*Caution: Low Base

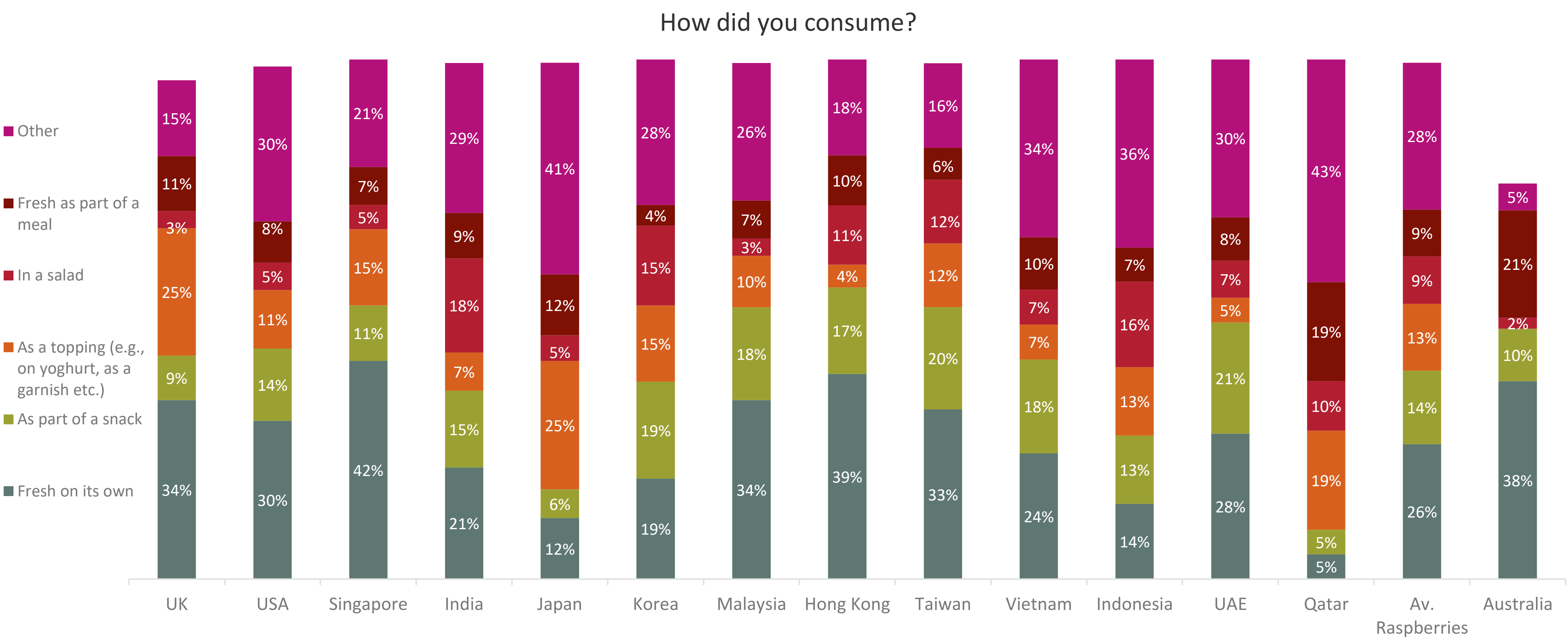
Hort Innovation

Raspberries



Source: Kantar HIA International Demand Study 2023





'Other' = In a smoothie / frappe / juice, As an ingredient in baking, As an ingredient in cooking, Cooked on its own, For decoration / show only, As part of an alcoholic drink e.g. cocktail and To make baby food / puree

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	151	151	150	149	162	150	151	114	147	149	152	168	21*

*Caution: Low Base

KANTAR

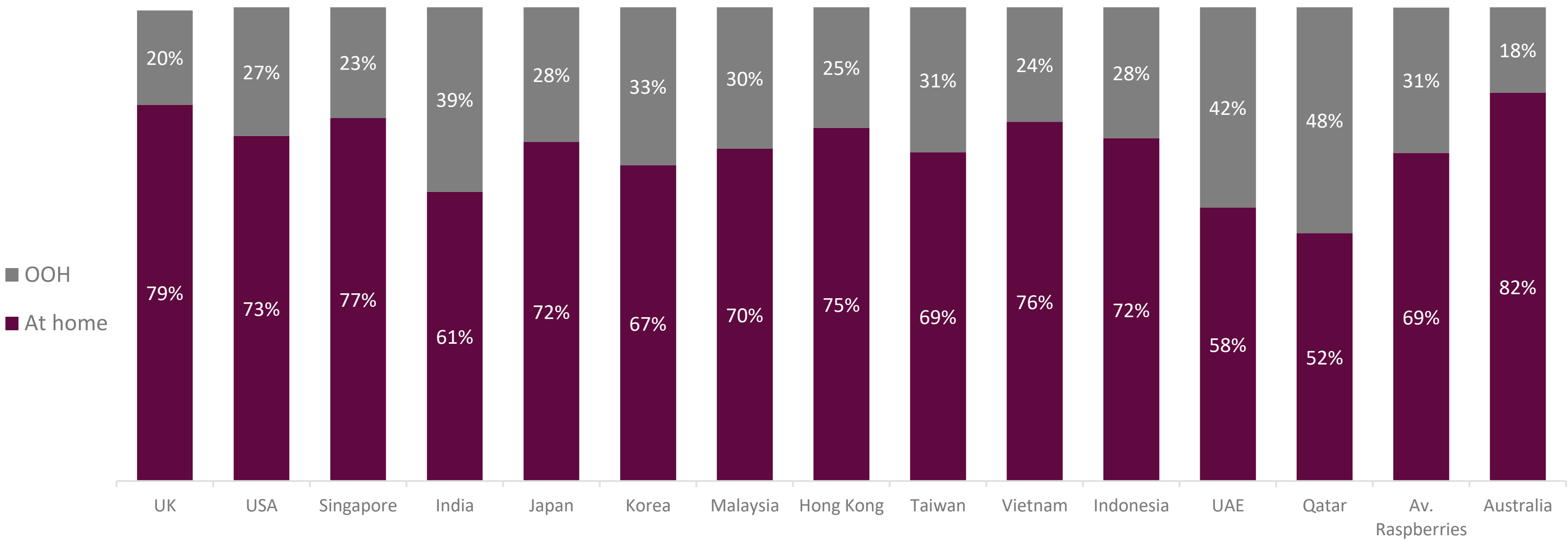
Hort Innovation

Raspberries

Where were you?

69%

Of consumption of raspberries is in the home, this varies only slightly by market



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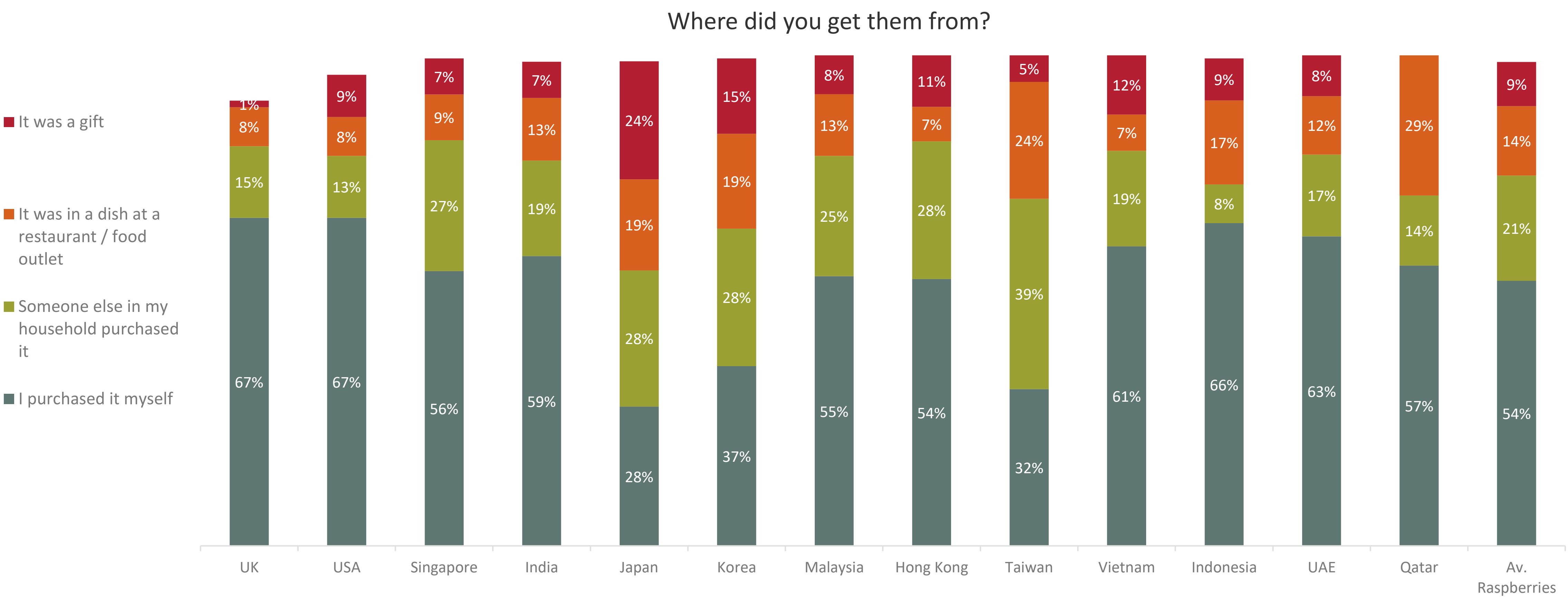
Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	151	151	150	149	162	150	151	114	147	149	152	168	21*

*Caution: Low Base

Hort Innovation

Raspberries



KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	151	151	150	149	162	150	151	114	147	149	152	168	21*

*Caution: Low Base

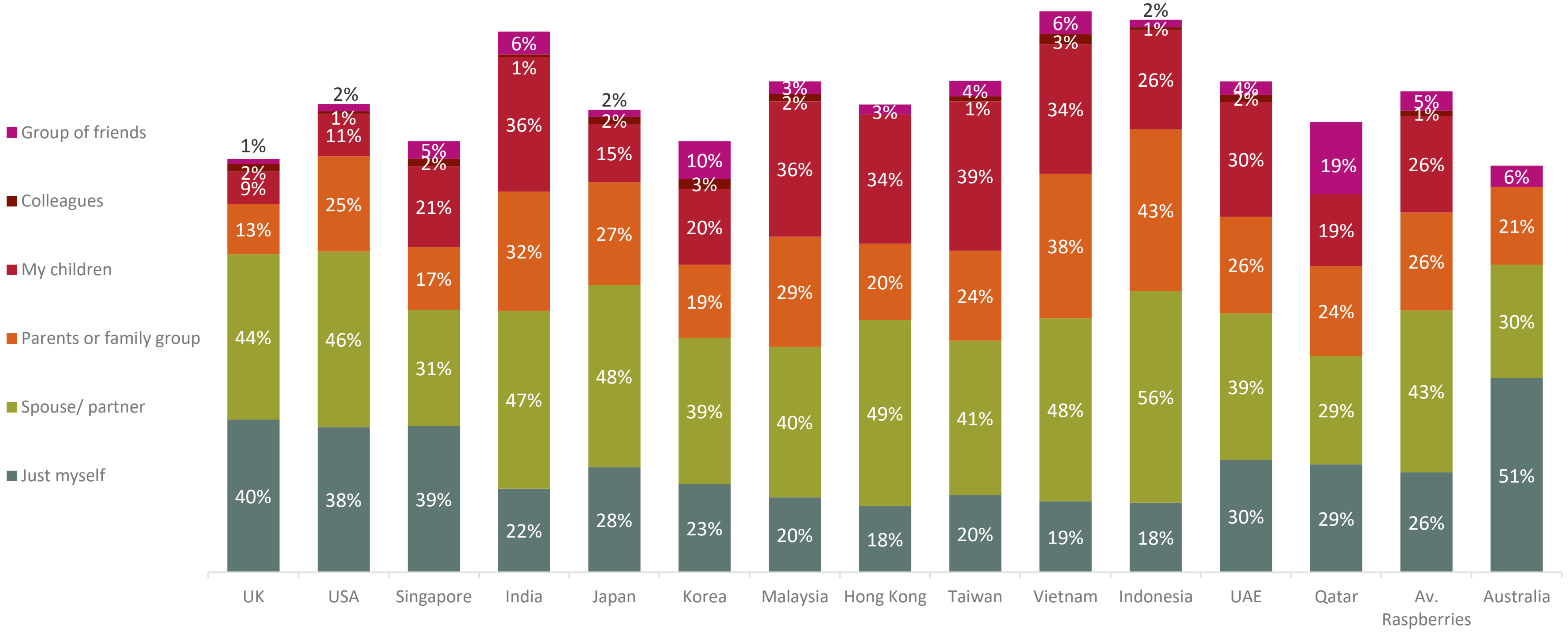
Hort Innovation

Raspberries

Who were you with?

43%

Of consumption of raspberries (on average) is with a partner/spouse.



Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	151	151	150	149	162	150	151	114	147	149	152	168	21*

KANTAR

Hort Innovation

Raspberries

Which were important when choosing to consume?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av	Aus
Tasty	69%	58%	53%	57%	51%	53%	57%	54%	37%	52%	63%	53%	38%	53%	71%
Quick & Easy	55%	37%	49%	40%	35%	30%	50%	50%	54%	34%	47%	43%	43%	44%	63%
Healthy & Nutritious	28%	28%	36%	40%	13%	34%	36%	25%	35%	36%	41%	37%	43%	33%	42%
Indulgence	36%	37%	33%	41%	22%	29%	42%	38%	30%	54%	49%	45%	48%	39%	26%
Physical & Mental Energy	15%	21%	23%	33%	10%	17%	26%	16%	18%	35%	28%	33%	29%	23%	27%
Connection	21%	28%	26%	48%	19%	37%	33%	26%	27%	48%	42%	36%	57%	35%	17%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	151	151	150	149	162	150	151	114	147	149	152	168	21*

*Caution: Low Base

Hort Innovation

Raspberries

Which were important when choosing to consume?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av	Aus
Really tasty	58%	36%	23%	28%	30%	21%	29%	32%	17%	28%	29%	27%	24%	29%	53%
Refreshing	25%	26%	32%	30%	20%	25%	30%	20%	11%	21%	37%	32%	33%	26%	33%
Quick and easy	36%	22%	31%	17%	22%	15%	26%	32%	18%	15%	23%	24%	19%	23%	42%
Has the nutrition my mind / body needs	9%	17%	17%	17%	7%	19%	20%	10%	18%	19%	19%	14%	19%	16%	24%
To satisfy a craving	15%	17%	12%	19%	4%	9%	21%	13%	9%	14%	22%	17%	19%	15%	11%
Everyone would eat	11%	14%	17%	19%	8%	23%	13%	12%	14%	19%	16%	15%	10%	15%	14%
New and different	3%	11%	7%	22%	12%	21%	15%	6%	10%	19%	14%	13%	19%	13%	4%
Good for sharing	12%	9%	13%	18%	2%	13%	13%	10%	7%	18%	20%	12%	19%	13%	6%
To treat / indulge myself or others	21%	13%	14%	9%	4%	2%	19%	14%	12%	16%	9%	11%	19%	13%	12%
That does not require much thought	17%	8%	15%	8%	11%	9%	9%	18%	31%	7%	7%	7%	14%	12%	17%

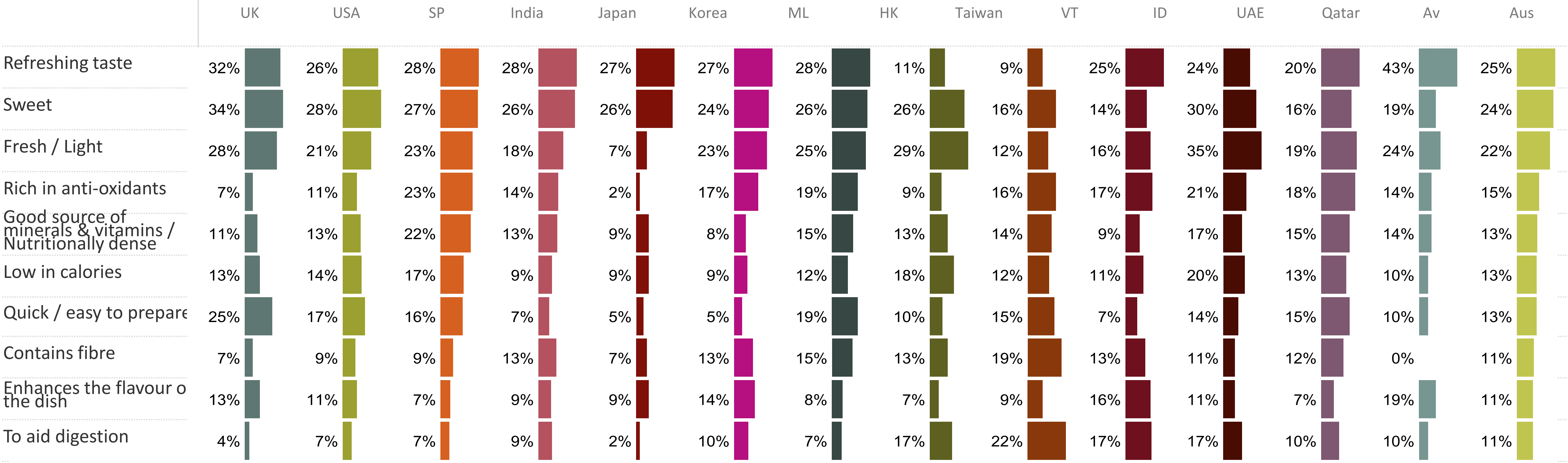
Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	151	151	150	149	162	150	151	114	147	149	152	168	21*

*Caution: Low Base

Raspberries

What were you looking for when you consumed?



Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	151	151	150	149	162	150	151	114	147	149	152	168	21*

*Caution: Low Base

Raspberries

What are the reasons you may not choose?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
It is too expensive	36%	23%	46%	25%	20%	39%	44%	37%	39%	34%	33%	24%	48%	34%
Quality is often poor	19%	10%	10%	17%	6%	7%	14%	12%	12%	14%	12%	18%	24%	13%
It bruises easily	8%	13%	11%	13%	8%	1%	10%	12%	9%	35%	7%	16%	24%	13%
There are more exciting alternatives	7%	12%	14%	19%	14%	19%	11%	6%	11%	14%	18%	11%	10%	13%
It goes off too quickly / it does not last	26%	12%	11%	12%	7%	9%	10%	15%	9%	17%	11%	11%	10%	12%
Not enough people in my household like it/them	5%	7%	12%	11%	9%	15%	11%	12%	14%	8%	14%	14%	14%	11%
It will not fill me up	9%	10%	11%	7%	9%	7%	9%	8%	11%	12%	13%	11%	19%	10%
They are never in the right state of ripeness when sold in shops	11%	10%	10%	10%	3%	7%	9%	14%	11%	5%	12%	10%	10%	9%
It contains too much sugar	3%	7%	12%	8%	6%	10%	7%	4%	7%	11%	12%	12%	5%	8%
Too much packaging	7%	5%	4%	10%	5%	5%	7%	6%	5%	13%	9%	13%	14%	8%

Raspberries

What else would you typically consider having instead?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
Blueberries	29%	30%	31%	26%	20%	24%	22%	25%	40%	17%	13%	19%	38%	26%
Apple	19%	23%	27%	41%	13%	19%	29%	21%	18%	21%	38%	32%	29%	25%
Strawberries	50%	36%	9%	15%	23%	18%	23%	19%	20%	17%	28%	24%	24%	23%
Bananas	25%	19%	27%	30%	9%	11%	30%	12%	19%	23%	32%	28%	29%	23%
Mango	9%	16%	25%	29%	4%	5%	34%	5%	10%	20%	28%	20%	43%	19%
Cherries	8%	22%	13%	26%	9%	13%	10%	21%	19%	15%	8%	20%	24%	16%
Blackberries	16%	23%	24%	31%	7%	11%	16%	12%	18%	11%	11%	13%	10%	16%
Kiwifruit	9%	11%	19%	24%	11%	5%	22%	9%	19%	18%	16%	13%	19%	15%
Melon	15%	9%	14%	13%	3%	6%	17%	8%	3%	18%	24%	15%	33%	14%
Pineapple	7%	15%	10%	27%	7%	8%	17%	10%	11%	9%	14%	20%	24%	14%

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	151	151	150	149	162	150	151	114	147	149	152	168	21*

*Caution: Low Base

Raspberries

What does premium quality mean to you?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
Fresher	36%	30%	43%	40%	14%	33%	41%	36%	26%	37%	40%	38%	38%	35%
Sweeter	23%	21%	37%	22%	23%	19%	26%	37%	13%	27%	27%	23%	33%	25%
Higher in vitamins and minerals	11%	15%	28%	28%	19%	20%	23%	20%	26%	30%	39%	25%	24%	24%
More flavour	32%	28%	20%	32%	21%	20%	15%	28%	12%	19%	22%	23%	24%	23%
Organic / free from pesticides	15%	19%	25%	28%	13%	19%	23%	13%	26%	27%	30%	23%	29%	22%
Right state of ripeness	27%	30%	25%	23%	12%	11%	23%	21%	21%	22%	24%	21%	24%	22%
I trust its safety	13%	17%	17%	30%	15%	16%	17%	20%	12%	15%	20%	18%	19%	18%
More appetizing (e.g. not bruised, damaged)	16%	16%	18%	15%	6%	15%	20%	9%	11%	27%	13%	16%	24%	16%
Premium packaging	7%	13%	13%	21%	12%	9%	25%	8%	11%	21%	24%	20%	19%	16%
Lasts longer	24%	17%	16%	26%	6%	5%	5%	9%	3%	23%	16%	23%	5%	14%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	151	151	150	149	162	150	151	114	147	149	152	168	21*

*Caution: Low Base

Hort Innovation

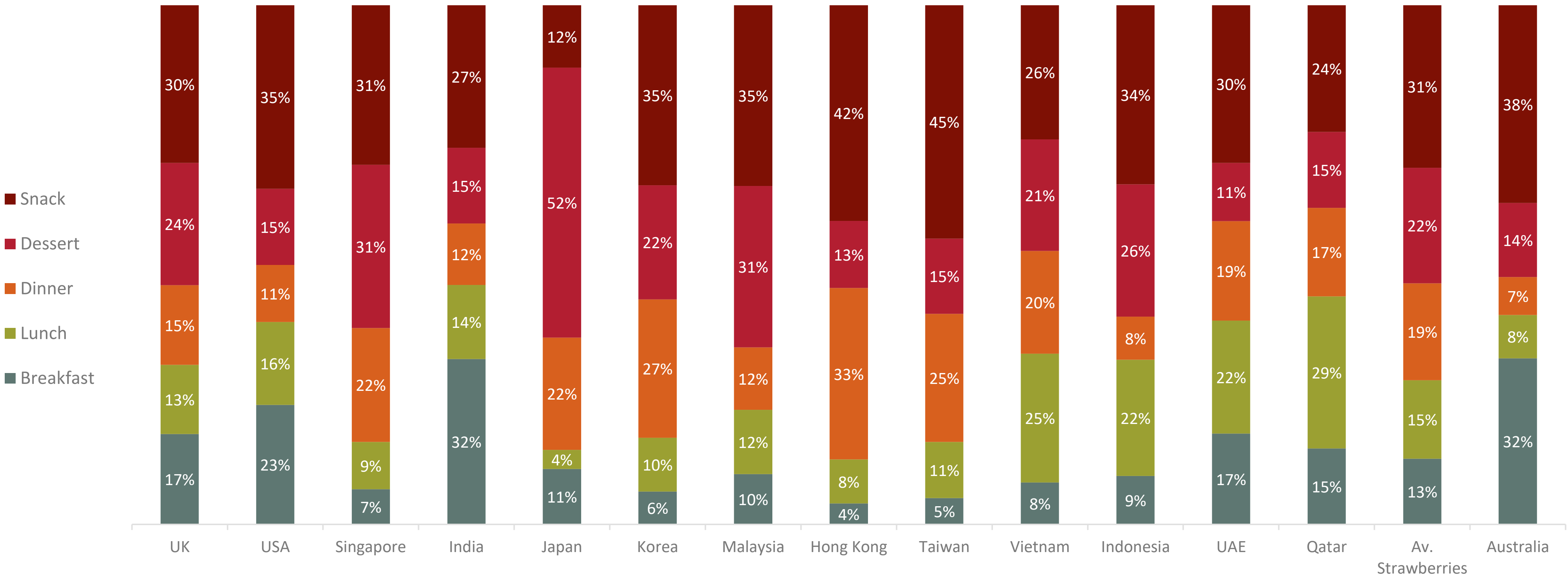
KANTAR

4.11 Strawberries

Hort Innovation

Strawberry

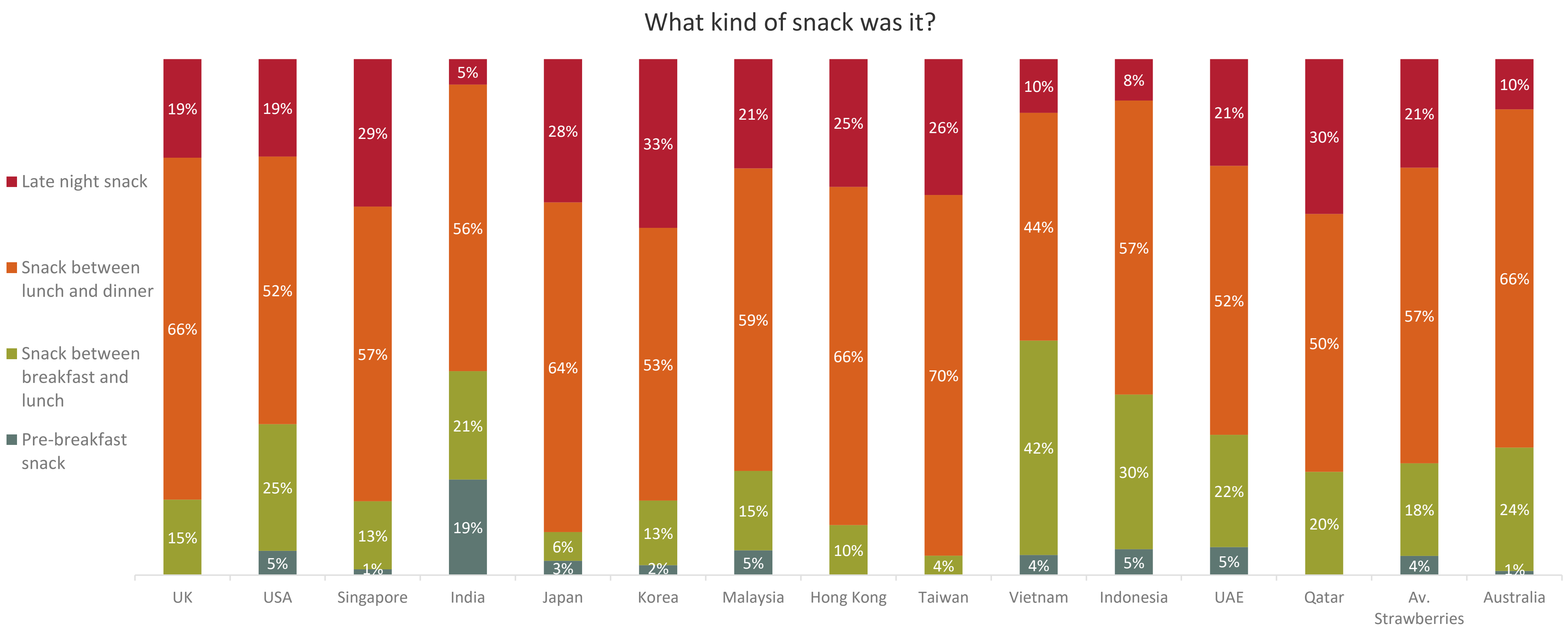
When did you consume?



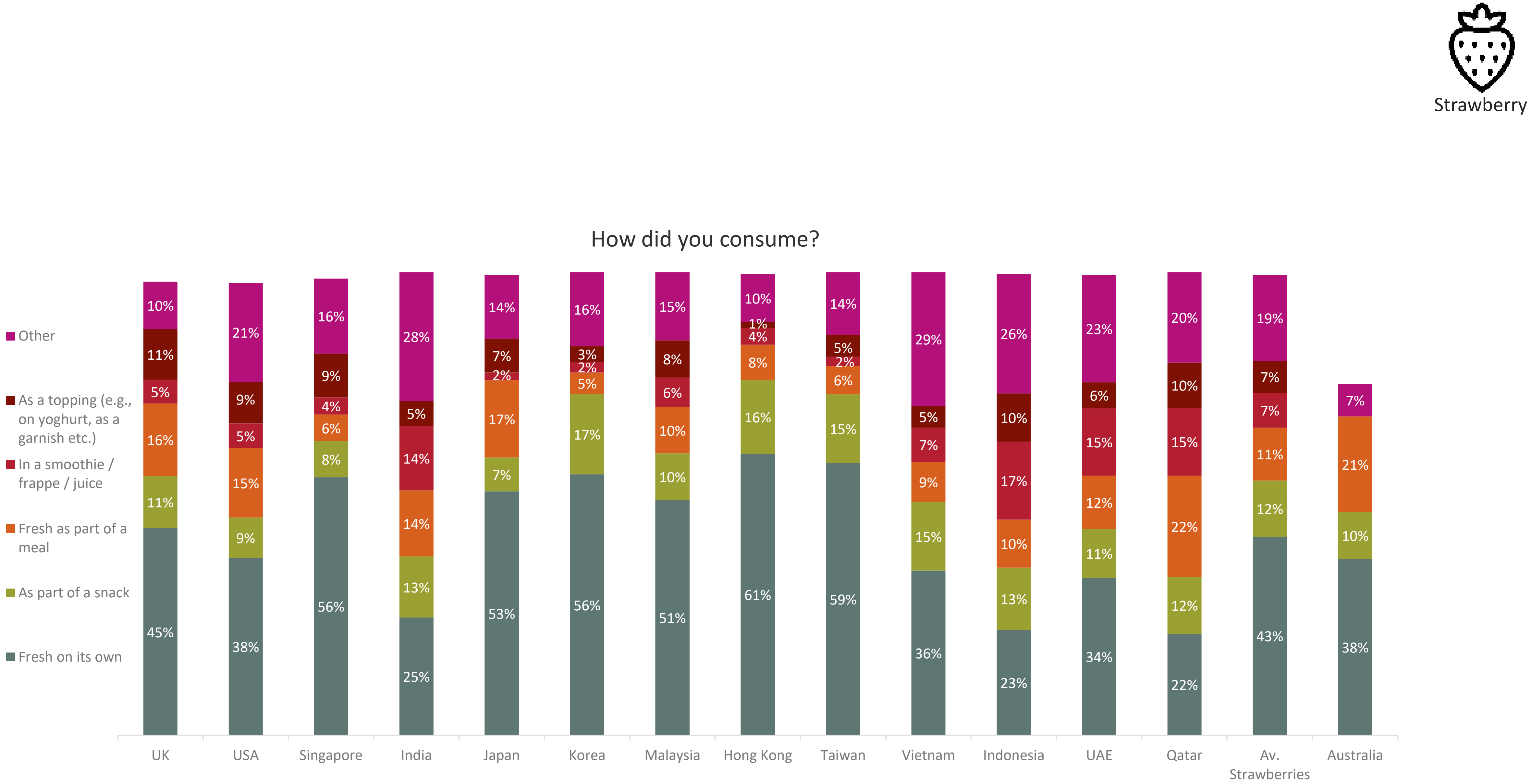
Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	296	295	300	300	299	224	296	298	290	303	41

Strawberry



Source: Kantar HIA International Demand Study 2023



'Other' = In a salad, As an ingredient in baking, Cooked on its own, As an ingredient in cooking, For decoration / show only, To make baby food / puree, As part of an alcoholic drink e.g. cocktail And Don't know

Source: Kantar HIA International Demand Study 2023

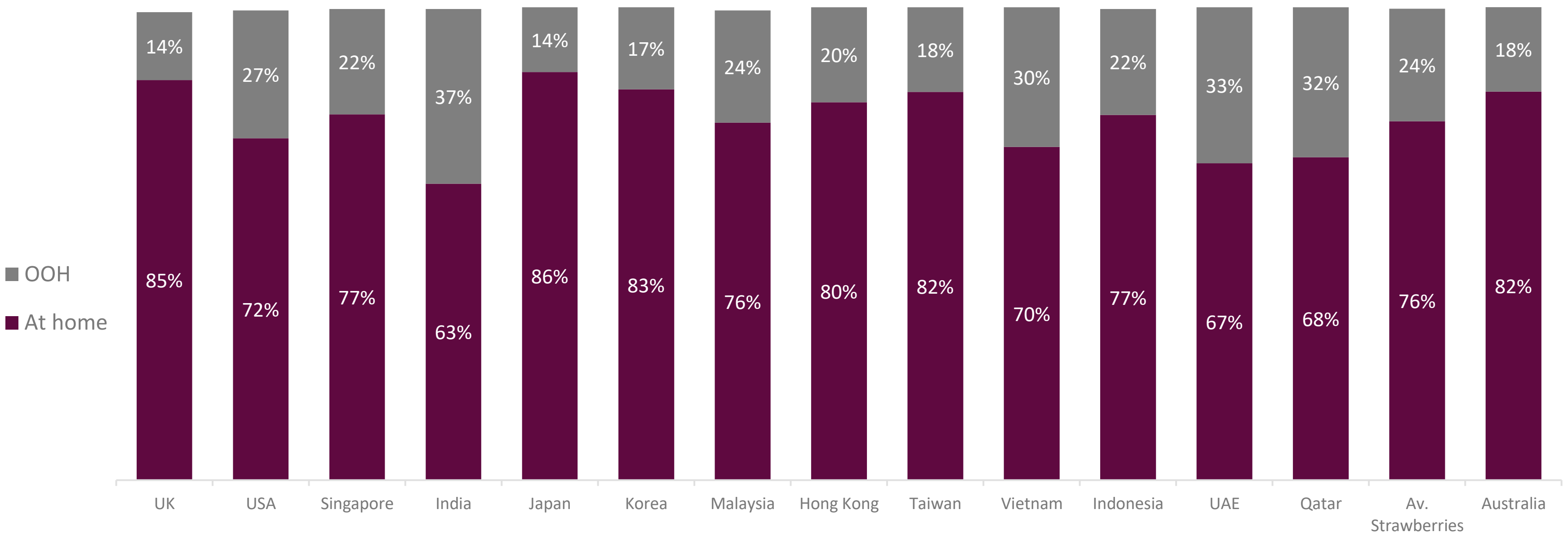
N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	296	295	300	300	299	224	296	298	290	303	41

Strawberry

Where were you?

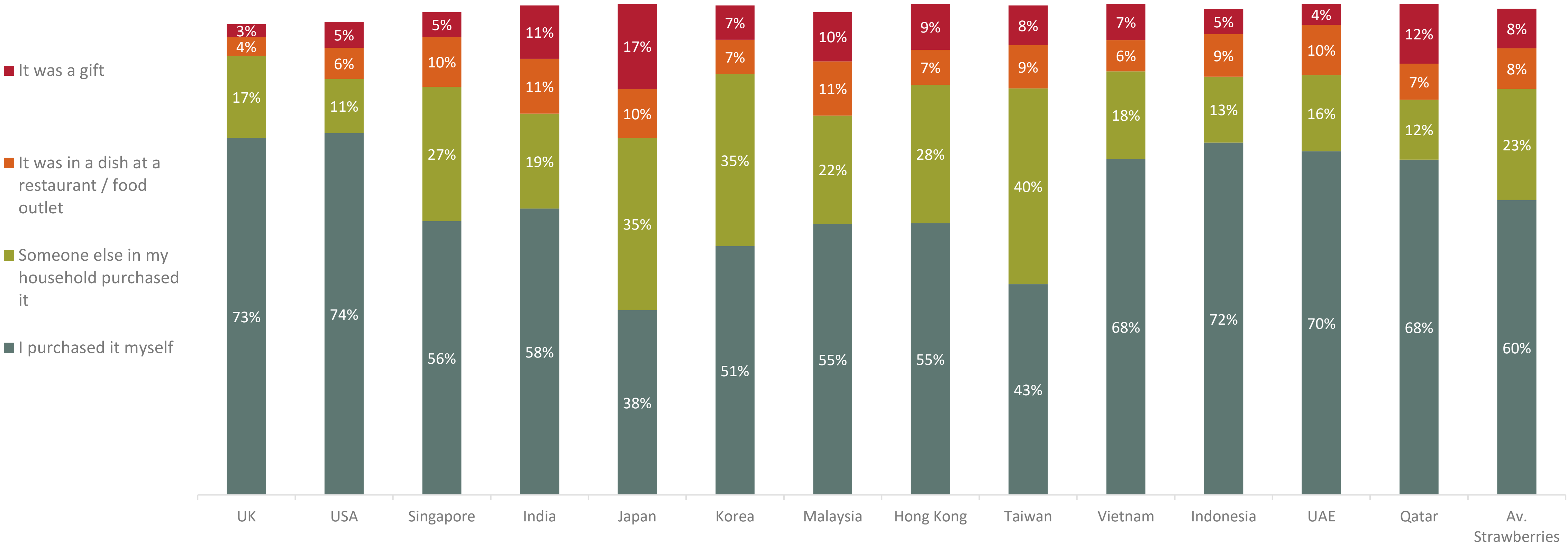
76%

of consumption of strawberries is in the home, this varies only slightly by market



Strawberry

Where did you get them from?



KANTAR

Source: Kantar HIA International Demand Study 2023

	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
N=	293	300	296	295	300	300	299	224	296	298	290	303	41

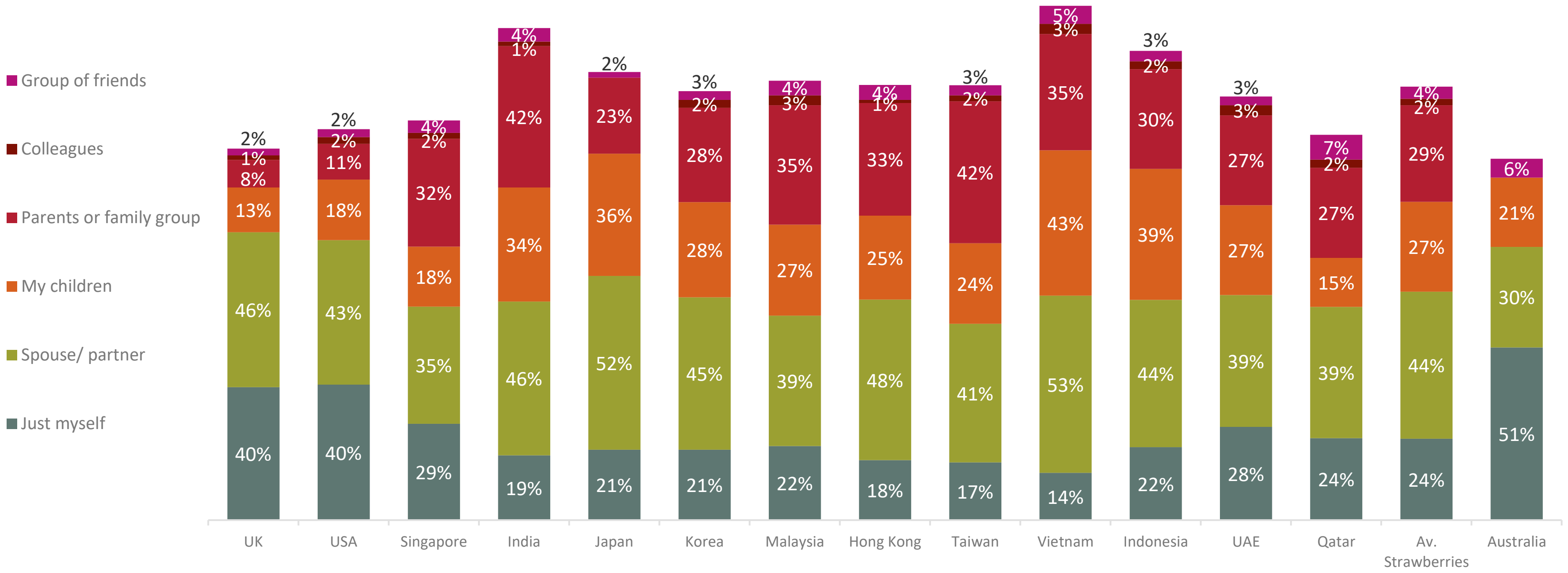
Hort Innovation

Strawberry

Who were you with?

44%

of consumption of strawberries (on average) is with a spouse/partner.



KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	296	295	300	300	299	224	296	298	290	303	41

Hort Innovation

Strawberry

Which were important when choosing to consume?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av	Aus
Tasty	72%	62%	58%	59%	67%	69%	64%	66%	66%	54%	66%	55%	59%	63%	71%
Quick & Easy	51%	49%	45%	44%	30%	28%	50%	41%	38%	42%	52%	44%	49%	43%	63%
Healthy & Nutritious	28%	29%	31%	36%	12%	19%	29%	24%	17%	41%	43%	37%	34%	29%	42%
Indulgence	37%	44%	41%	47%	29%	23%	40%	37%	50%	51%	42%	46%	34%	40%	26%
Physical & Mental Energy	20%	21%	19%	35%	8%	17%	19%	18%	8%	30%	25%	27%	15%	20%	27%
Connection	18%	26%	30%	43%	19%	32%	35%	19%	27%	42%	41%	36%	22%	30%	17%

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	296	295	300	300	299	224	296	298	290	303	41

Strawberry

Which were important when choosing to consume?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av	Aus
Really tasty	53%	41%	28%	28%	52%	47%	32%	47%	46%	33%	28%	32%	44%	39%	53%
Refreshing	32%	28%	33%	35%	17%	23%	40%	18%	9%	21%	47%	30%	24%	27%	33%
Quick and easy	39%	32%	24%	24%	24%	11%	29%	17%	17%	20%	31%	22%	34%	25%	42%
To satisfy a craving	13%	21%	21%	21%	9%	6%	17%	18%	24%	18%	16%	25%	22%	18%	11%
Everyone would eat	13%	14%	15%	16%	12%	28%	17%	22%	27%	17%	15%	14%	12%	17%	14%
Good for sharing	10%	12%	19%	16%	6%	22%	19%	9%	15%	20%	19%	18%	10%	15%	6%
Has the nutrition my mind / body needs	10%	16%	17%	14%	8%	11%	19%	12%	11%	17%	22%	18%	20%	15%	24%
To treat / indulge myself or others	20%	14%	16%	14%	7%	4%	11%	16%	20%	15%	10%	14%	10%	13%	12%
To cheer me up	8%	8%	12%	13%	9%	7%	16%	16%	5%	13%	14%	19%	2%	11%	0%
That does not require much thought	13%	9%	10%	9%	9%	9%	12%	14%	19%	12%	10%	8%	5%	11%	17%

Strawberry

What were you looking for when you consumed?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
Sweet	49%	37%	33%	25%	59%	54%	34%	42%	34%	20%	24%	27%	17%	35%
Refreshing taste	41%	36%	30%	27%	32%	51%	32%	19%	16%	28%	32%	26%	27%	31%
Fresh / Light	32%	29%	26%	25%	10%	32%	26%	26%	21%	17%	34%	24%	10%	24%
Good source of minerals & vitamins / Nutritionally dense	7%	10%	18%	16%	17%	11%	17%	8%	16%	19%	27%	14%	12%	15%
Quick / easy to prepare	27%	18%	14%	11%	7%	4%	19%	14%	18%	9%	19%	14%	10%	14%
Rich in anti-oxidants	8%	8%	20%	16%	2%	7%	19%	8%	8%	20%	28%	15%	7%	13%
Fun / exciting	9%	9%	7%	16%	17%	8%	14%	4%	6%	18%	18%	14%	10%	11%
Low in calories	16%	16%	7%	12%	3%	7%	11%	11%	6%	9%	12%	12%	15%	10%
That is good value for money	11%	13%	9%	15%	4%	5%	9%	14%	13%	14%	5%	11%	12%	10%
Tangy	3%	9%	5%	12%	2%	3%	4%	15%	36%	11%	8%	8%	5%	9%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	296	295	300	300	299	224	296	298	290	303	41

Hort Innovation

Strawberry

What are the reasons you may not choose?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
It is too expensive	38%	24%	57%	28%	40%	50%	51%	46%	57%	28%	23%	26%	27%	38%
It bruises easily	9%	8%	14%	16%	16%	13%	14%	25%	24%	34%	15%	18%	12%	17%
It goes off too quickly / it does not last	23%	18%	17%	13%	21%	6%	15%	16%	17%	20%	18%	13%	7%	16%
Quality is often poor	17%	19%	15%	15%	6%	8%	20%	16%	16%	16%	26%	19%	7%	15%
There are more exciting alternatives	4%	10%	10%	18%	8%	14%	9%	7%	6%	15%	21%	12%	20%	12%
They are never in the right state of ripeness when sold in shops	10%	18%	12%	12%	3%	2%	10%	11%	6%	6%	9%	12%	15%	10%
It will not fill me up	5%	9%	6%	15%	4%	4%	10%	6%	4%	13%	11%	11%	10%	8%
Not enough people in my household like it/them	4%	7%	8%	14%	2%	5%	8%	5%	3%	13%	13%	11%	15%	8%
The quantity is more than I typically need	5%	5%	6%	12%	5%	3%	4%	5%	1%	10%	9%	11%	7%	6%
Too much packaging	4%	4%	3%	15%	0%	2%	7%	7%	3%	11%	9%	8%	10%	6%

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	296	295	300	300	299	224	296	298	290	303	41

Strawberry

What else would you typically consider having instead?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
Apple	19%	24%	35%	40%	26%	32%	38%	20%	33%	33%	41%	32%	27%	31%
Bananas	26%	26%	33%	38%	19%	14%	39%	19%	27%	23%	37%	32%	27%	28%
Mango	8%	12%	27%	31%	5%	4%	38%	17%	18%	23%	38%	23%	20%	20%
Blueberries	20%	23%	24%	22%	7%	7%	15%	21%	19%	14%	13%	18%	12%	17%
Melon	13%	16%	17%	19%	8%	6%	25%	12%	5%	13%	31%	17%	29%	16%
Table Grapes	15%	17%	0%	0%	9%	18%	14%	21%	24%	26%	12%	23%	22%	15%
Kiwifruit	7%	6%	23%	21%	15%	11%	24%	19%	24%	12%	13%	14%	10%	15%
Cherries	9%	14%	17%	23%	9%	9%	9%	20%	27%	10%	10%	18%	15%	15%
Pineapple	15%	13%	12%	23%	11%	11%	18%	11%	11%	14%	12%	17%	15%	14%
Citrus fruits (orange, lemon, lime, grapefruit)	10%	10%	15%	16%	12%	14%	16%	18%	18%	10%	18%	14%	10%	14%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	293	300	296	295	300	300	299	224	296	298	290	303	41

Hort Innovation

Strawberry

What does premium quality mean to you?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
Fresher	40%	36%	41%	43%	23%	34%	51%	39%	42%	42%	46%	42%	41%	40%
Sweeter	33%	31%	41%	27%	44%	35%	37%	44%	30%	32%	33%	28%	24%	34%
Right state of ripeness	32%	39%	22%	25%	9%	19%	21%	15%	24%	29%	28%	22%	15%	23%
More flavour	40%	20%	17%	25%	22%	20%	14%	35%	14%	22%	24%	19%	10%	22%
Organic / free from pesticides	12%	13%	22%	30%	11%	19%	27%	13%	24%	26%	36%	24%	17%	21%
More appetizing (e.g. not bruised, damaged)	18%	24%	22%	18%	12%	18%	17%	12%	21%	29%	20%	16%	17%	19%
Higher in vitamins and minerals	8%	13%	22%	27%	11%	12%	20%	11%	13%	24%	36%	22%	24%	19%
I trust its safety	8%	16%	13%	33%	17%	9%	16%	11%	14%	22%	27%	26%	10%	17%
Larger than normal	15%	14%	21%	14%	18%	18%	23%	15%	12%	19%	28%	15%	5%	17%
Locally grown / produced in my area	27%	23%	6%	21%	27%	15%	9%	6%	16%	12%	13%	15%	15%	16%

KANTAR

Source: Kantar HIA International Demand Study 2023

	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
N=	293	300	296	295	300	300	299	224	296	298	290	303	41

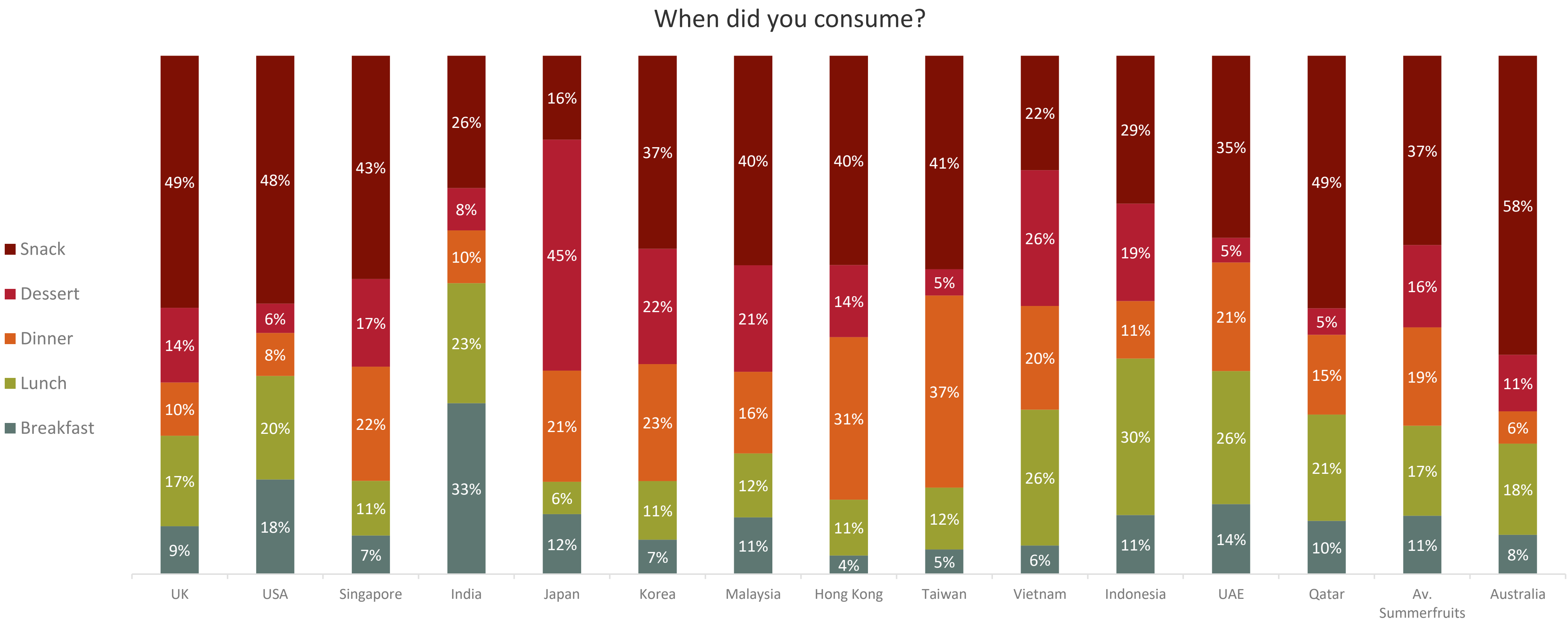
Hort Innovation

KANTAR

4.12
Summerfruits

Hort Innovation

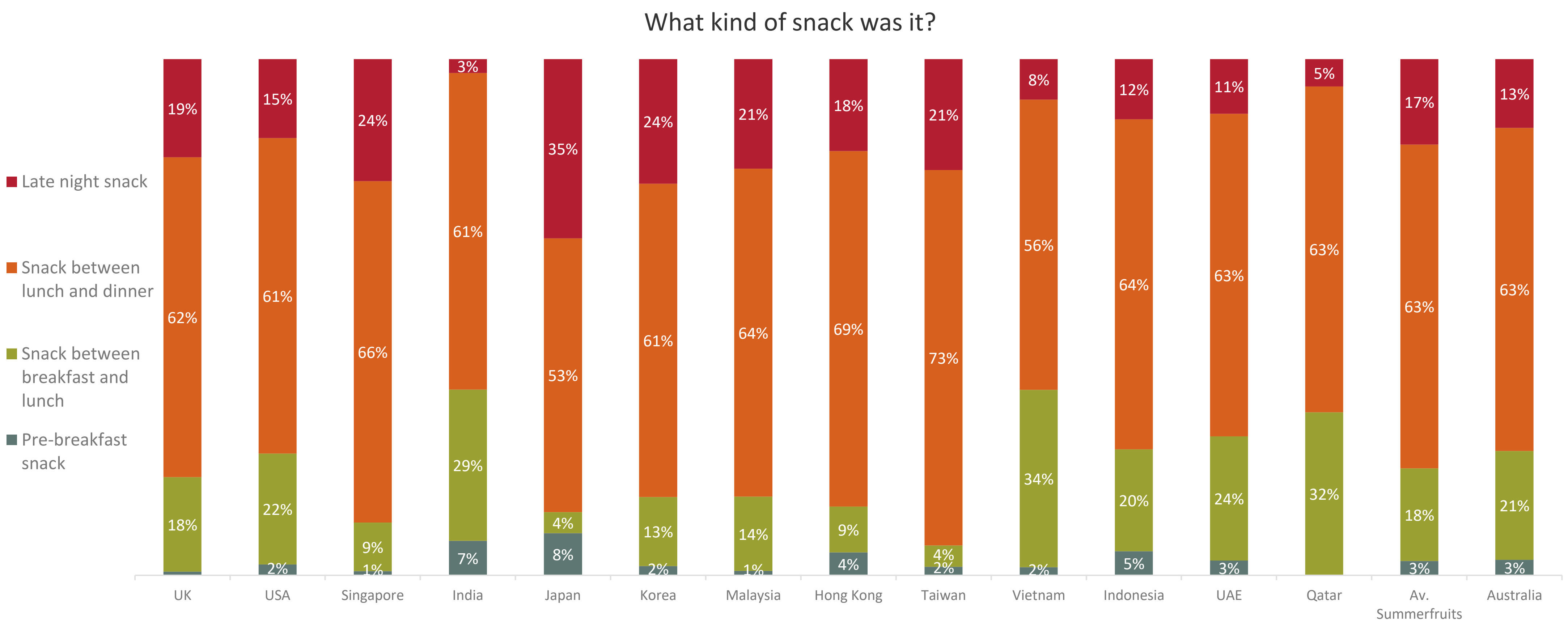
Summer Fruit



Source: Kantar HIA International Demand Study 2023

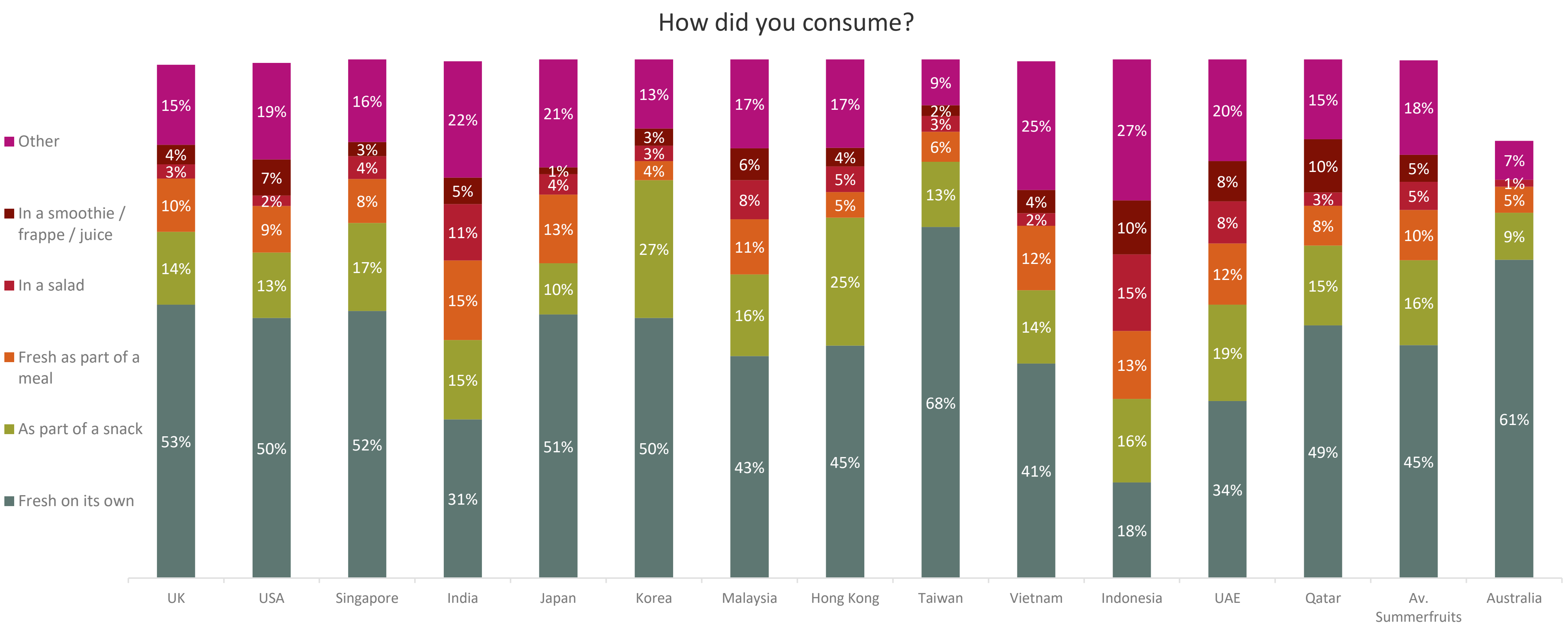
N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	301	295	294	303	301	292	223	294	290	298	296	39

Summer Fruit



Source: Kantar HIA International Demand Study 2023

Summer Fruit



	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar	Av. Summerfruits	Australia
Other	15%	19%	16%	22%	21%	13%	17%	17%	9%	25%	27%	20%	15%	18%	7%
In a smoothie / frappe / juice	4%	7%	3%	5%	1%	3%	6%	4%	2%	4%	10%	8%	10%	5%	1%
In a salad	3%	2%	4%	11%	4%	3%	8%	5%	3%	2%	15%	8%	3%	5%	
Fresh as part of a meal	10%	9%	8%	15%	13%	4%	11%	5%	6%	12%	13%	12%	8%	10%	5%
As part of a snack	14%	13%	17%	15%	10%	27%	16%	25%	13%	14%	16%	19%	15%	16%	9%
Fresh on its own	53%	50%	52%	31%	51%	50%	43%	45%	68%	41%	18%	34%	49%	45%	61%

'Other' = In a salad, As an ingredient in baking, Cooked on its own, As an ingredient in cooking, For decoration / show only, To make baby food / puree, As part of an alcoholic drink e.g. cocktail And Don't know

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	301	295	294	303	301	292	223	294	290	298	296	39

KANTAR

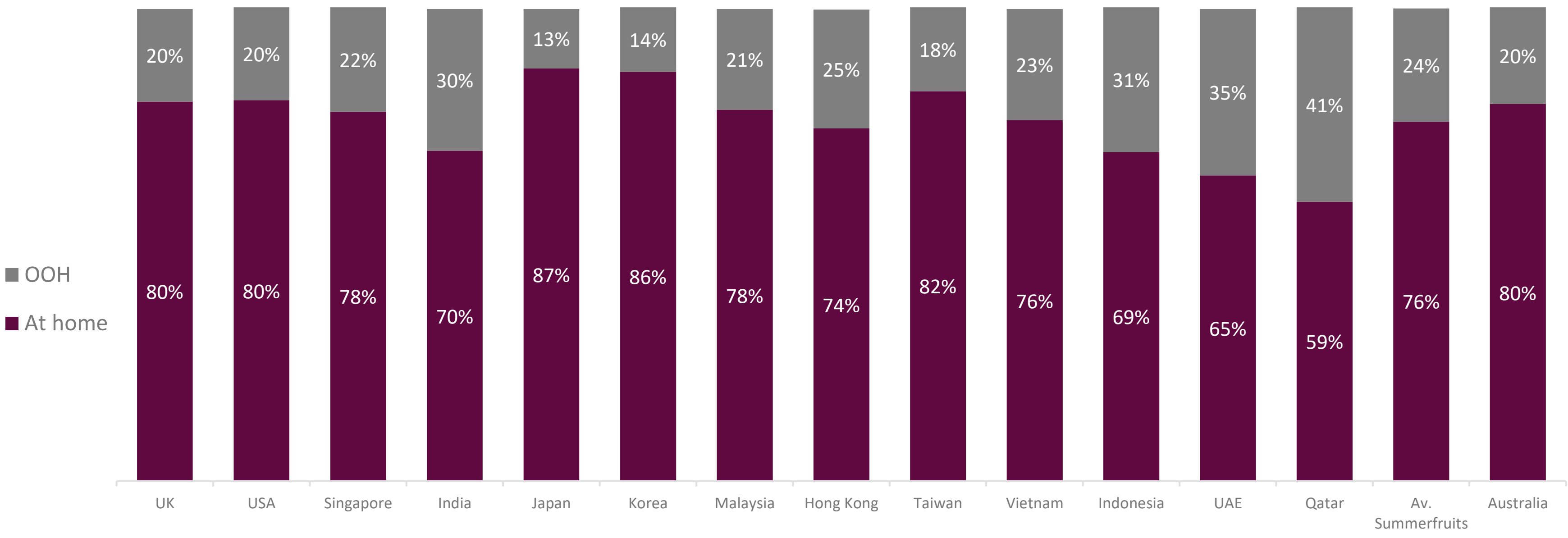
Hort Innovation

Summer Fruit

Where were you?

76%

of consumption of summerfruits is in the home, this varies only slightly by market



KANTAR

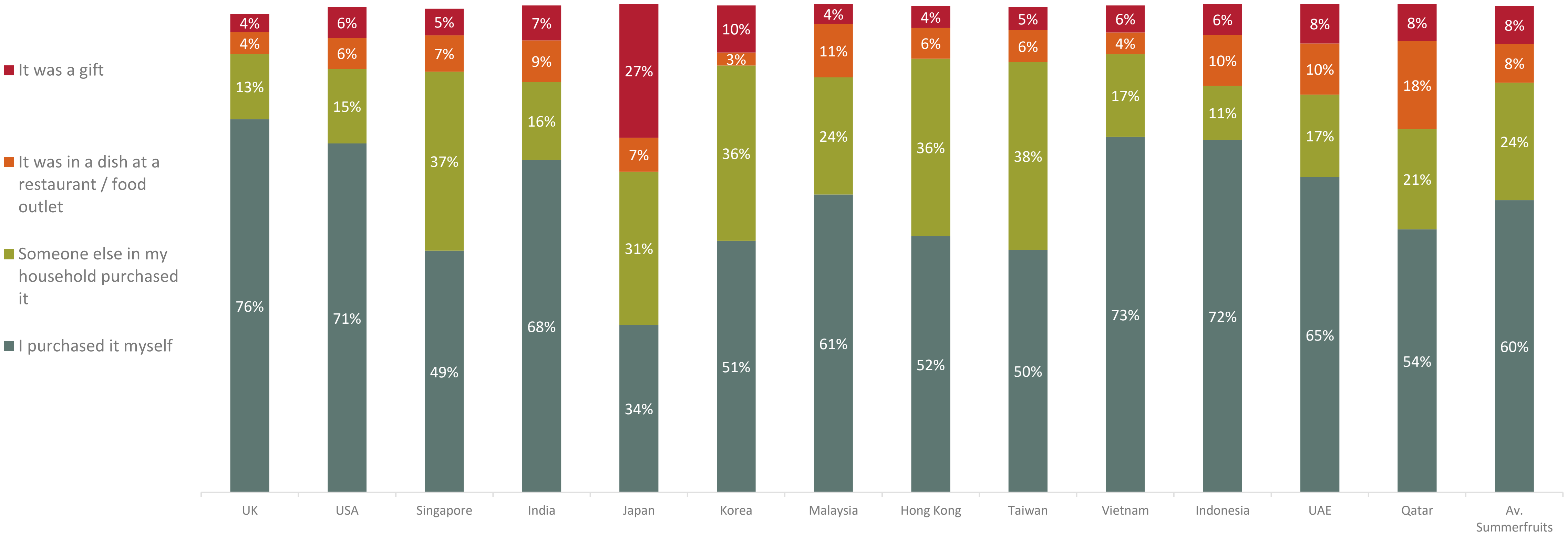
Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	301	295	294	303	301	292	223	294	290	298	296	39

Hort Innovation

Summer Fruit

Where did you get them from?



Source: Kantar HIA International Demand Study 2023

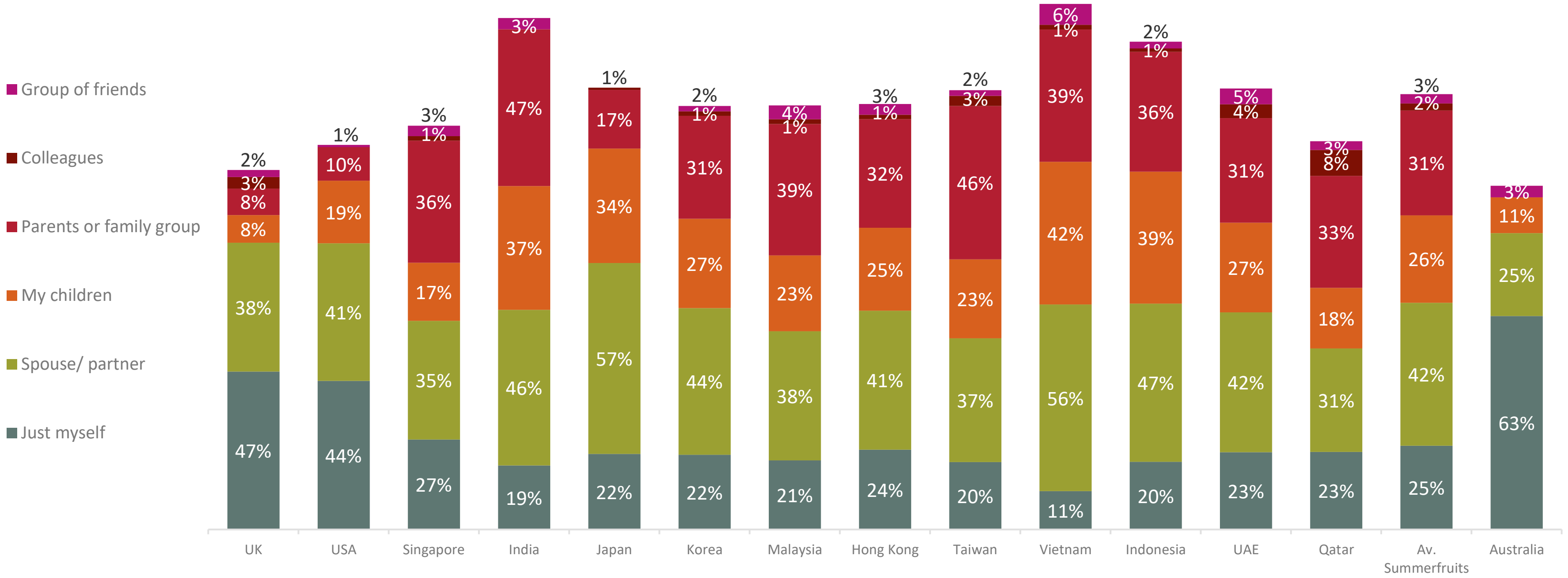
N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	301	295	294	303	301	292	223	294	290	298	296	39

Summer Fruit

Who were you with?

31%

of consumption of summerfruits (on average) is with children.



Summer Fruit

Which were important when choosing to consume?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av	Aus
Tasty	67%	62%	56%	64%	62%	67%	62%	61%	54%	61%	62%	59%	67%	62%	63%
Quick & Easy	54%	54%	50%	42%	33%	29%	45%	49%	53%	41%	42%	43%	41%	44%	66%
Healthy & Nutritious	36%	29%	35%	45%	16%	20%	40%	29%	33%	39%	44%	45%	31%	34%	29%
Indulgence	32%	41%	32%	38%	25%	31%	45%	35%	34%	48%	43%	38%	49%	38%	29%
Physical & Mental Energy	28%	32%	23%	47%	8%	22%	23%	20%	20%	32%	32%	43%	21%	27%	30%
Connection	11%	19%	29%	42%	14%	30%	29%	20%	17%	43%	49%	38%	26%	28%	12%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	301	295	294	303	301	292	223	294	290	298	296	39

Hort Innovation

Summer Fruit

Which were important when choosing to consume?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av	Aus
Really tasty	45%	41%	32%	33%	47%	43%	29%	39%	35%	33%	28%	28%	38%	36%	42%
Refreshing	40%	30%	29%	31%	19%	23%	39%	19%	9%	22%	35%	30%	33%	28%	32%
Quick and easy	41%	38%	27%	21%	22%	10%	29%	26%	23%	20%	24%	21%	21%	25%	46%
Everyone would eat	8%	11%	14%	20%	10%	27%	19%	22%	22%	27%	19%	19%	23%	18%	9%
To satisfy a craving	15%	27%	16%	18%	7%	10%	25%	13%	13%	19%	14%	22%	36%	18%	17%
Has the nutrition my mind / body needs	16%	17%	19%	22%	10%	10%	24%	13%	16%	21%	23%	22%	15%	18%	17%
Good for sharing	6%	9%	17%	17%	5%	19%	17%	8%	11%	27%	25%	15%	8%	14%	5%
That helped me relax / unwind	6%	5%	7%	13%	15%	16%	11%	10%	10%	22%	17%	7%	15%	12%	8%
Already available at home / work etc.	15%	15%	13%	9%	2%	10%	13%	15%	17%	10%	11%	10%	13%	12%	16%
To stop me feeling hungry	15%	18%	13%	14%	6%	11%	10%	9%	10%	11%	11%	15%	10%	12%	17%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	301	295	294	303	301	292	223	294	290	298	296	39

Hort Innovation

Summer Fruit

What were you looking for when you consumed?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
Sweet	32%	35%	29%	16%	43%	49%	24%	25%	27%	22%	22%	23%	33%	29%
Refreshing taste	44%	40%	21%	30%	19%	44%	30%	17%	13%	28%	30%	25%	21%	28%
Fresh / Light	31%	35%	24%	21%	11%	27%	26%	23%	12%	18%	23%	24%	26%	23%
Good source of minerals & vitamins / Nutritionally dense	11%	15%	16%	19%	11%	9%	17%	9%	26%	19%	22%	19%	21%	16%
Contains fibre	9%	10%	18%	19%	11%	11%	20%	29%	20%	21%	16%	15%	15%	16%
Quick / easy to prepare	25%	23%	21%	10%	5%	4%	17%	16%	22%	9%	15%	13%	18%	15%
To aid digestion	5%	3%	16%	13%	3%	13%	15%	20%	25%	23%	12%	12%	15%	13%
Rich in anti-oxidants	7%	8%	18%	20%	2%	7%	19%	9%	15%	14%	21%	14%	18%	13%
Low in calories	18%	12%	11%	15%	7%	8%	15%	10%	10%	10%	15%	15%	10%	12%
That is good value for money	13%	12%	13%	12%	8%	7%	9%	13%	10%	13%	10%	9%	5%	10%

Summer Fruit

What are the reasons you may not choose?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
It is too expensive	28%	27%	39%	23%	38%	31%	44%	31%	32%	19%	29%	26%	28%	30%
It bruises easily	16%	16%	14%	13%	18%	15%	12%	17%	19%	36%	9%	16%	23%	17%
Quality is often poor	14%	19%	13%	15%	3%	10%	13%	16%	14%	16%	16%	19%	10%	14%
It goes off too quickly / it does not last	24%	10%	9%	11%	19%	4%	10%	17%	10%	21%	9%	13%	15%	13%
There are more exciting alternatives	7%	11%	11%	14%	6%	17%	15%	8%	12%	16%	19%	19%	8%	12%
They are never in the right state of ripeness when sold in shops	15%	16%	10%	11%	4%	5%	8%	13%	11%	13%	13%	14%	13%	11%
It contains too much sugar	4%	8%	14%	14%	6%	14%	10%	15%	16%	14%	11%	12%	5%	11%
It is too messy to eat	13%	11%	7%	13%	13%	9%	7%	16%	17%	8%	10%	11%	0%	10%
Not enough people in my household like it/them	9%	8%	12%	16%	3%	6%	12%	9%	6%	12%	14%	17%	8%	10%
I don't really like the taste	6%	6%	11%	10%	7%	7%	8%	10%	9%	14%	11%	9%	5%	9%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	301	295	294	303	301	292	223	294	290	298	296	39

Hort Innovation

Summer Fruit

What else would you typically consider having instead?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
Apple	39%	41%	37%	56%	30%	36%	46%	34%	48%	41%	44%	42%	36%	41%
Bananas	48%	40%	44%	49%	25%	26%	42%	27%	43%	32%	35%	39%	23%	36%
Mango	15%	17%	33%	49%	9%	11%	43%	19%	29%	33%	44%	32%	33%	28%
Melon	22%	23%	24%	31%	11%	13%	28%	20%	9%	23%	31%	29%	33%	23%
Strawberries	42%	36%	0%	0%	19%	29%	18%	24%	16%	27%	20%	30%	23%	22%
Pear	27%	18%	19%	20%	9%	21%	29%	19%	23%	25%	23%	23%	10%	21%
Kiwifruit	13%	12%	24%	26%	22%	12%	25%	20%	34%	18%	18%	18%	23%	20%
Pineapple	20%	24%	20%	31%	15%	14%	22%	10%	22%	17%	22%	27%	18%	20%
Table Grapes	30%	24%	0%	0%	8%	25%	17%	23%	23%	36%	16%	37%	18%	20%
Citrus fruits (orange, lemon, lime, grapefruit)	22%	14%	17%	24%	12%	16%	23%	19%	24%	18%	21%	19%	18%	19%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	301	295	294	303	301	292	223	294	290	298	296	39

Hort Innovation

Summer Fruit

What does premium quality mean to you?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
Fresher	43%	42%	44%	43%	21%	36%	46%	42%	39%	48%	42%	44%	41%	41%
Sweeter	22%	26%	29%	21%	29%	34%	18%	35%	38%	31%	23%	27%	23%	27%
More flavour	37%	27%	21%	28%	20%	24%	18%	38%	18%	23%	31%	28%	26%	26%
Right state of ripeness	34%	35%	26%	27%	13%	13%	21%	24%	28%	33%	23%	23%	13%	24%
Higher in vitamins and minerals	10%	16%	24%	34%	11%	11%	30%	12%	22%	27%	32%	25%	15%	21%
Organic / free from pesticides	16%	17%	20%	29%	7%	20%	26%	14%	14%	35%	28%	26%	15%	21%
I trust its safety	12%	16%	19%	30%	10%	16%	19%	17%	12%	22%	28%	25%	26%	19%
More appetizing (e.g. not bruised, damaged)	19%	21%	20%	19%	10%	20%	15%	13%	17%	33%	15%	22%	10%	18%
Lasts longer	21%	20%	14%	21%	4%	8%	15%	11%	9%	23%	23%	19%	8%	15%
Locally grown / produced in my area	18%	20%	9%	22%	21%	18%	8%	6%	16%	17%	16%	17%	3%	15%

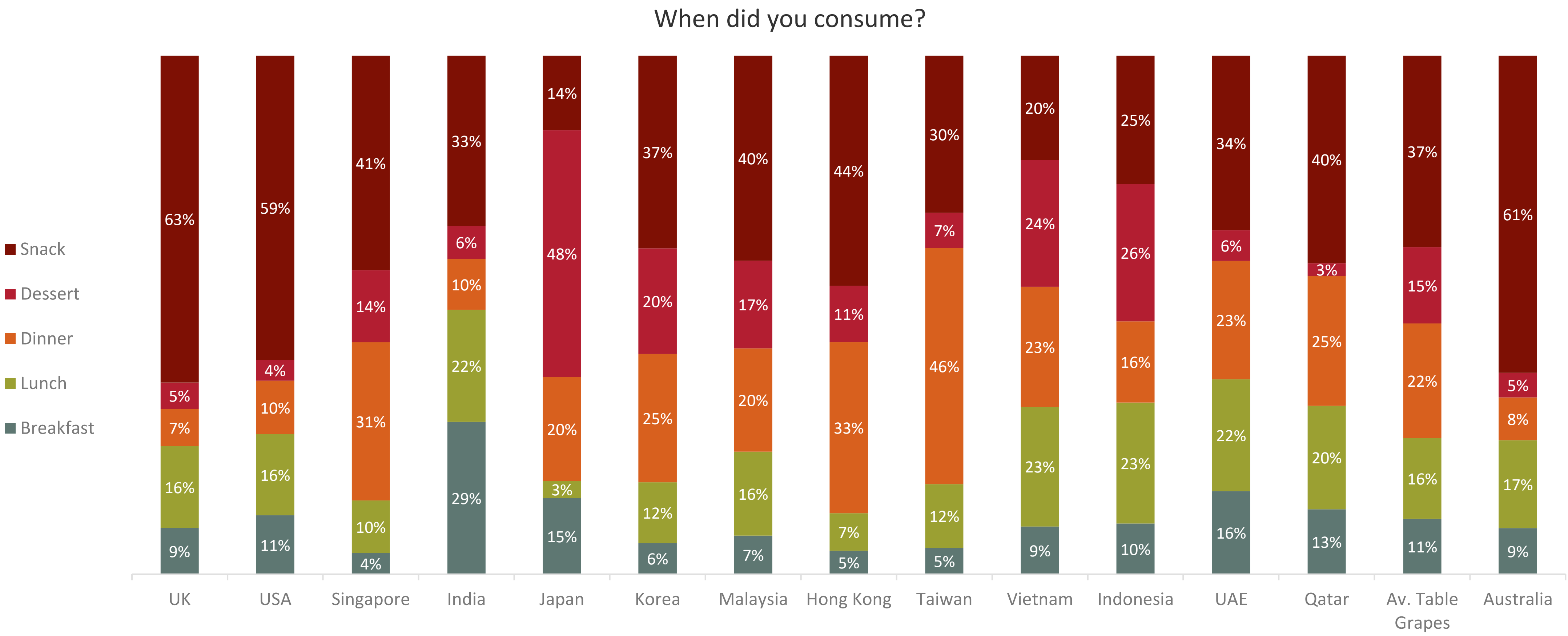
Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	301	295	294	303	301	292	223	294	290	298	296	39

4.13

Table Grapes

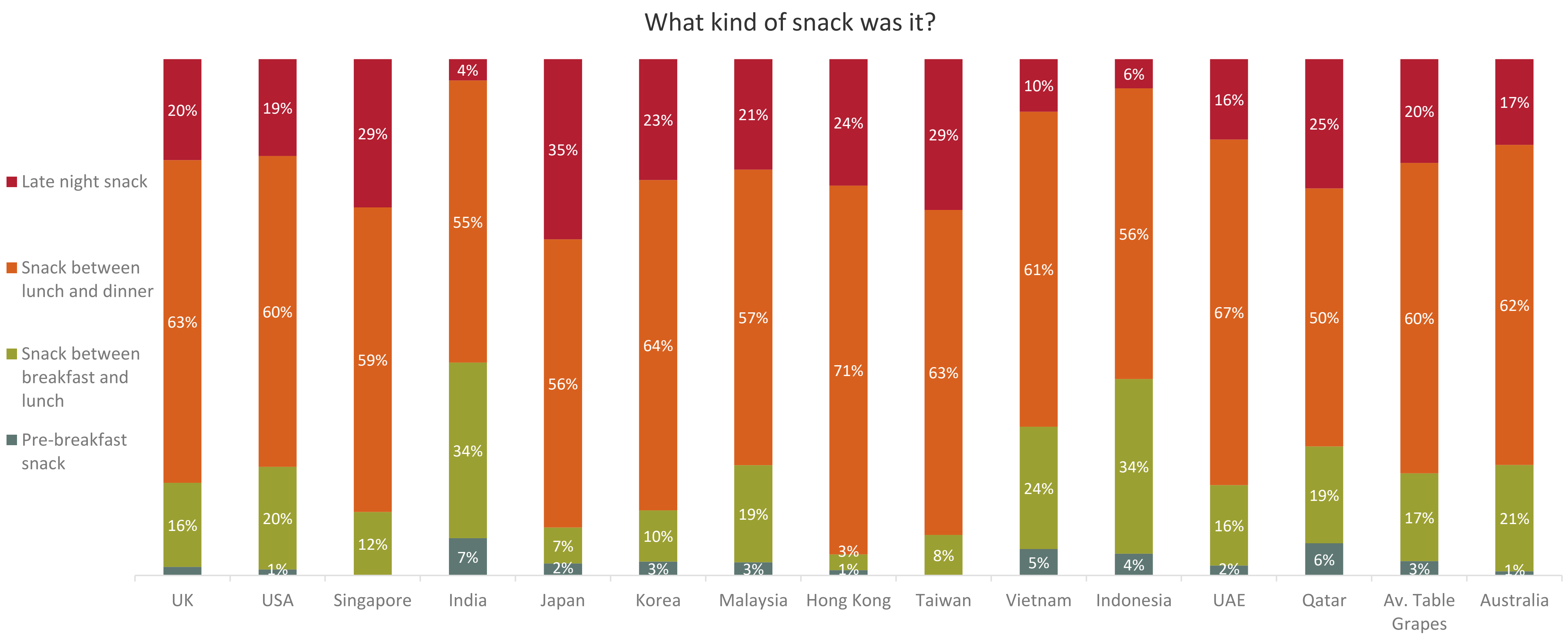
Table Grapes



Source: Kantar HIA International Demand Study 2023

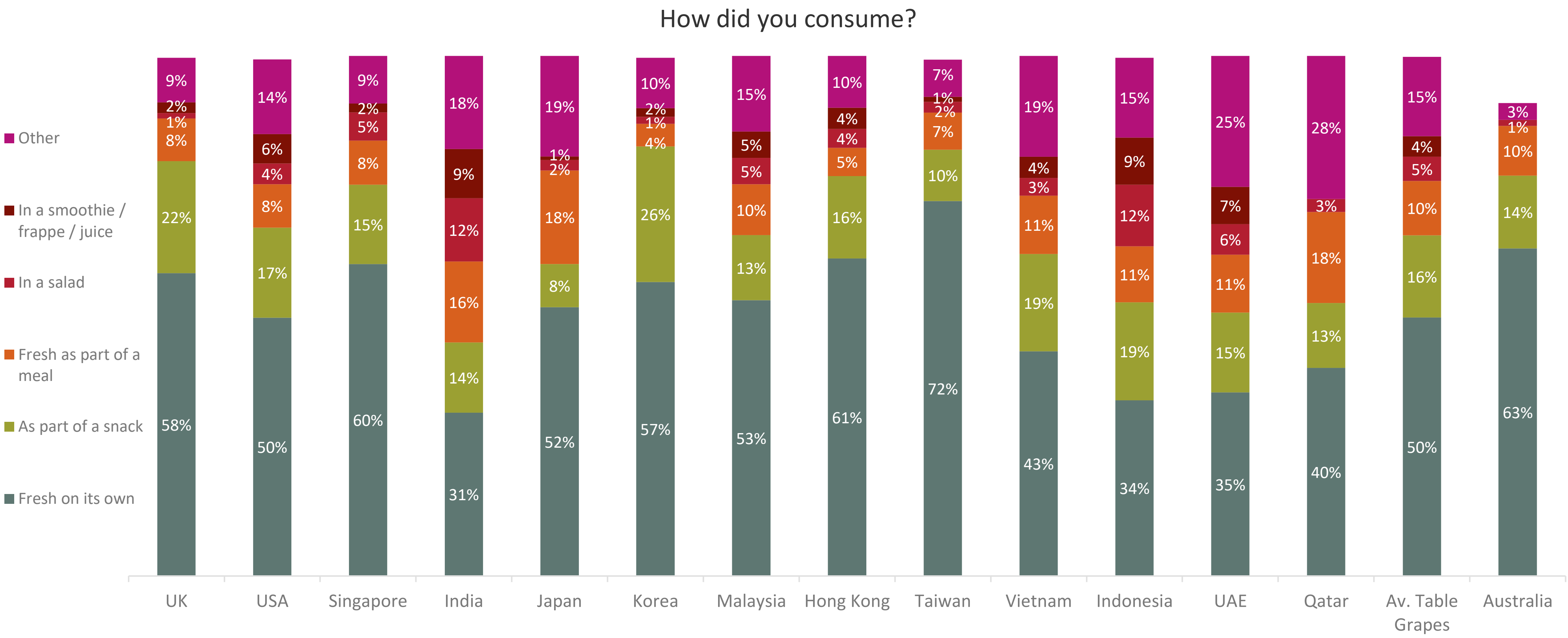
N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	295	296	300	299	296	221	294	294	287	306	40

Table Grapes



Source: Kantar HIA International Demand Study 2023

Table Grapes



'Other' = As a topping (e.g., on yoghurt, as a garnish etc.), Cooked on its own, As an ingredient in cooking, As an ingredient in baking, To make baby food / puree, As part of an alcoholic drink e.g. cocktail, For decoration / show only And Don't know

Source: Kantar HIA International Demand Study 2023

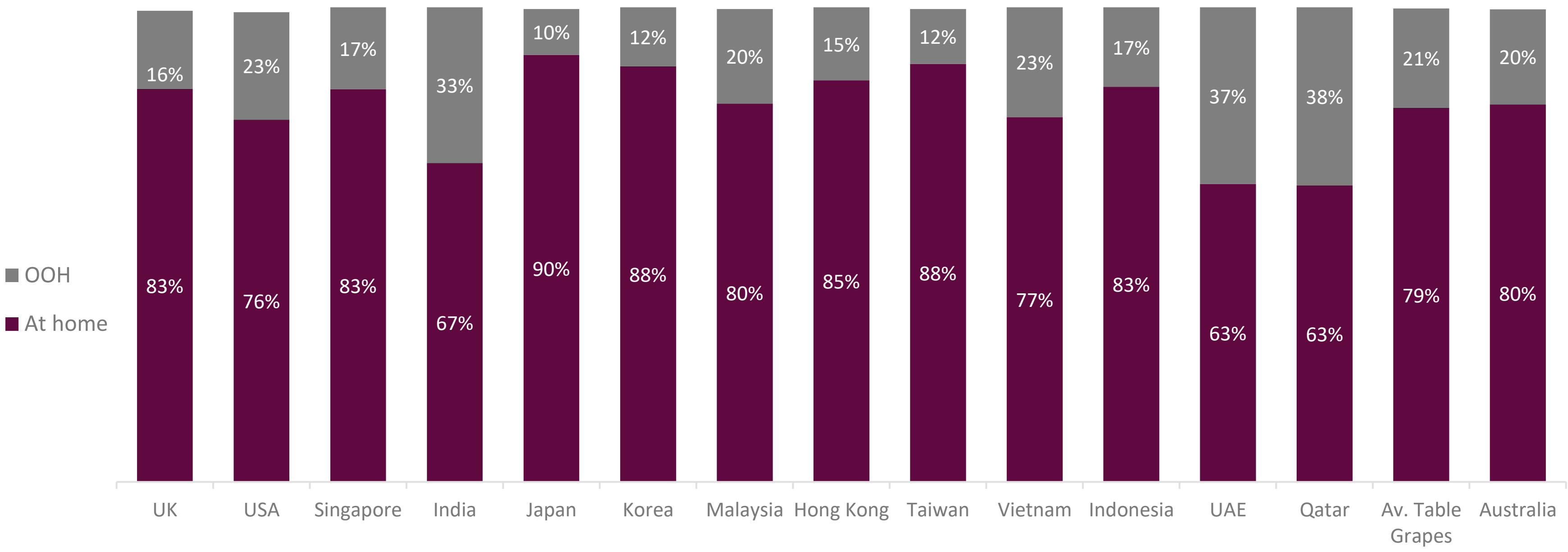
N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	295	296	300	299	296	221	294	294	287	306	40

Table Grapes

Where were you?

79%

of consumption of table grapes is in the home, this varies only slightly by market



Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	295	296	300	299	296	221	294	294	287	306	40

Table Grapes

Where did you get them from?

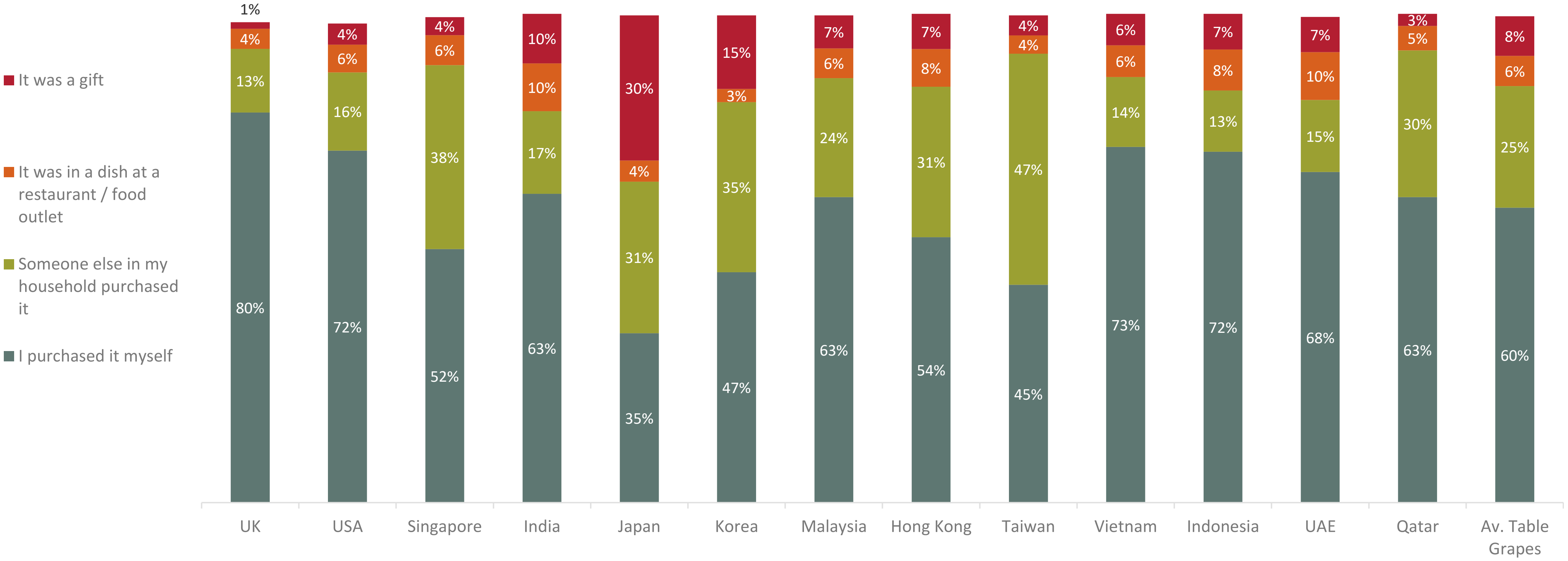
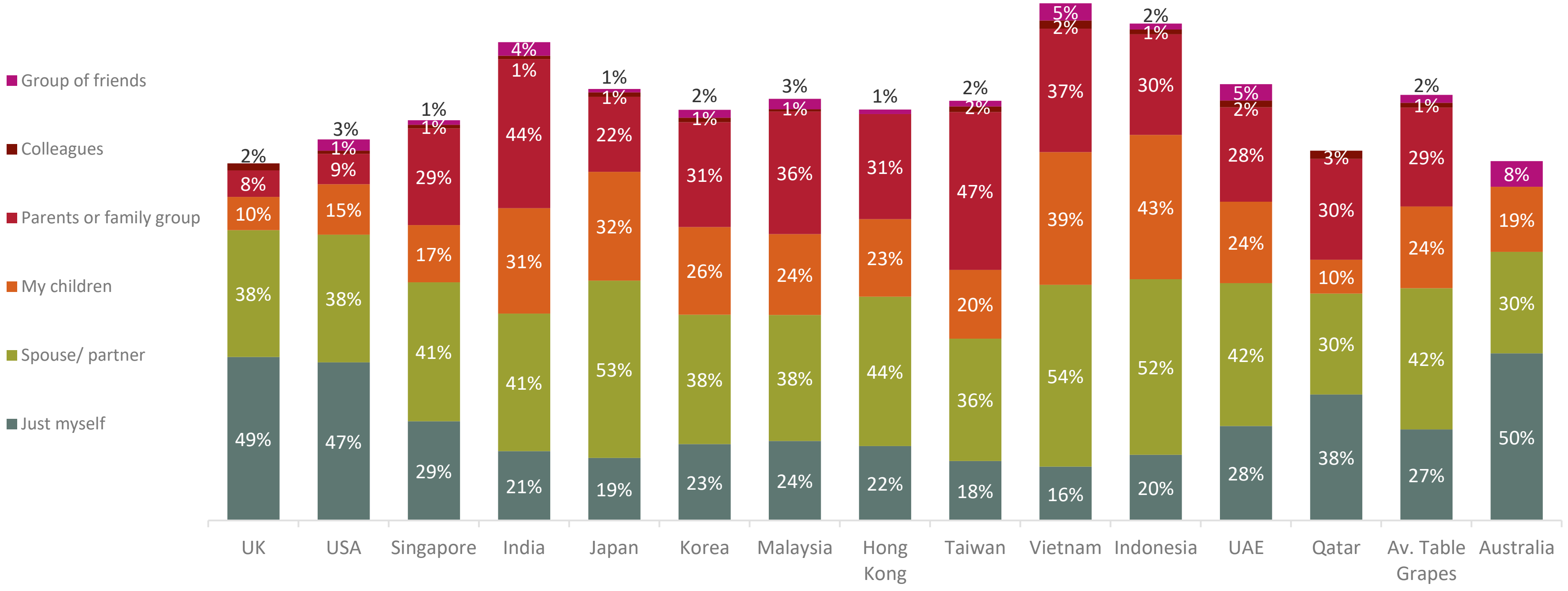


Table Grapes

Who were you with?

42%

of consumption of table grapes (on average) is with a spouse/partner.



Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	295	296	300	299	296	221	294	294	287	306	40

Table Grapes

Which were important when choosing to consume?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av	Aus
Tasty	63%	66%	53%	60%	62%	70%	66%	61%	57%	60%	66%	57%	60%	62%	71%
Quick & Easy	57%	56%	55%	43%	43%	32%	49%	46%	56%	31%	50%	45%	53%	47%	68%
Healthy & Nutritious	25%	30%	29%	39%	12%	15%	34%	29%	29%	40%	43%	35%	48%	31%	31%
Indulgence	32%	36%	31%	46%	28%	33%	40%	35%	32%	48%	45%	39%	40%	37%	26%
Physical & Mental Energy	23%	31%	19%	44%	9%	15%	27%	23%	16%	27%	26%	40%	35%	26%	27%
Connection	19%	26%	25%	38%	17%	32%	28%	15%	16%	43%	43%	39%	20%	28%	21%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	295	296	300	299	296	221	294	294	287	306	40

Hort Innovation

Table Grapes

Which were important when choosing to consume?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av	Aus
Really tasty	40%	38%	26%	24%	52%	43%	29%	36%	41%	40%	31%	29%	28%	35%	43%
Refreshing	36%	35%	24%	32%	18%	21%	43%	23%	9%	17%	42%	28%	40%	28%	45%
Quick and easy	41%	37%	36%	19%	31%	14%	32%	25%	21%	18%	29%	24%	28%	27%	44%
Everyone would eat	9%	17%	18%	22%	10%	30%	19%	23%	25%	27%	22%	17%	20%	20%	16%
Has the nutrition my mind / body needs	10%	12%	18%	19%	6%	10%	21%	12%	16%	23%	23%	19%	25%	16%	15%
Good for sharing	15%	18%	17%	15%	7%	25%	19%	7%	13%	26%	25%	20%	5%	16%	14%
To satisfy a craving	17%	22%	14%	20%	6%	10%	18%	16%	12%	17%	16%	18%	25%	16%	11%
That does not require much thought	13%	16%	13%	9%	14%	12%	11%	15%	32%	7%	8%	7%	18%	13%	18%
That helped me relax / unwind	5%	6%	8%	16%	15%	17%	14%	14%	13%	23%	18%	11%	13%	13%	8%
To stop me feeling hungry	17%	15%	10%	18%	5%	6%	12%	12%	8%	6%	9%	15%	10%	11%	15%

KANTAR

Source: Kantar HIA International Demand Study 2023

N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
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Hort Innovation

Table Grapes

What were you looking for when you consumed?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
Sweet	44%	37%	30%	19%	51%	54%	38%	38%	40%	26%	33%	26%	30%	36%
Refreshing taste	42%	32%	32%	25%	27%	45%	37%	23%	12%	35%	37%	26%	33%	31%
Fresh / Light	28%	32%	26%	26%	9%	34%	27%	28%	16%	21%	30%	27%	30%	26%
Quick / easy to prepare	26%	24%	19%	8%	3%	3%	19%	20%	19%	8%	21%	10%	13%	15%
Good source of minerals & vitamins / Nutritionally dense	13%	6%	11%	18%	8%	6%	18%	13%	24%	20%	18%	15%	20%	15%
Rich in anti-oxidants	5%	6%	14%	19%	2%	8%	21%	15%	20%	19%	22%	14%	10%	13%
Contains fibre	6%	8%	11%	16%	4%	7%	13%	18%	18%	17%	18%	9%	3%	11%
To aid digestion	4%	6%	12%	10%	1%	8%	11%	19%	24%	21%	10%	10%	8%	11%
That is good value for money	13%	13%	12%	9%	7%	6%	11%	11%	13%	15%	6%	12%	15%	11%
Fun / exciting	3%	10%	5%	13%	17%	6%	9%	3%	2%	13%	13%	13%	18%	10%

KANTAR

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Hort Innovation

Table Grapes

What are the reasons you may not choose?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
It is too expensive	25%	23%	33%	20%	34%	29%	44%	38%	39%	29%	35%	18%	13%	29%
It bruises easily	7%	10%	12%	16%	11%	4%	16%	19%	18%	41%	13%	11%	30%	16%
Quality is often poor	16%	19%	13%	14%	4%	10%	19%	14%	13%	16%	18%	18%	13%	14%
It contains too much sugar	8%	9%	18%	15%	5%	17%	13%	24%	15%	13%	13%	14%	18%	14%
It goes off too quickly / it does not last	20%	12%	13%	12%	17%	4%	11%	11%	10%	21%	15%	12%	13%	13%
There are more exciting alternatives	10%	10%	13%	18%	8%	17%	9%	7%	6%	14%	21%	20%	13%	13%
It will not fill me up	12%	12%	8%	15%	2%	6%	11%	4%	3%	11%	11%	13%	13%	9%
It is too messy to eat	1%	3%	4%	10%	13%	14%	8%	9%	17%	4%	8%	10%	5%	8%
The quantity is more than I typically need	9%	12%	7%	13%	2%	6%	7%	5%	3%	9%	10%	8%	13%	8%
They are never in the right state of ripeness when sold in shops	9%	7%	6%	15%	3%	3%	10%	9%	6%	7%	10%	8%	8%	8%

KANTAR

Source: Kantar HIA International Demand Study 2023

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	292	300	295	296	300	299	296	221	294	294	287	306	40

Hort Innovation

Table Grapes

What else would you typically consider having instead?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
Apple	36%	42%	41%	51%	30%	34%	48%	29%	47%	40%	47%	38%	33%	40%
Bananas	35%	27%	34%	40%	20%	20%	43%	26%	39%	33%	43%	35%	40%	34%
Strawberries	33%	26%	7%	10%	25%	23%	18%	26%	18%	22%	26%	31%	35%	23%
Mango	10%	12%	28%	36%	5%	5%	39%	15%	21%	31%	46%	28%	20%	23%
Melon	15%	16%	24%	22%	13%	6%	28%	10%	8%	20%	34%	26%	30%	19%
Citrus fruits (orange, lemon, lime, grapefruit)	13%	13%	13%	19%	15%	17%	21%	15%	24%	17%	25%	19%	15%	17%
Pear	17%	12%	18%	15%	8%	12%	24%	13%	19%	22%	31%	15%	10%	17%
Kiwifruit	7%	10%	16%	21%	19%	8%	18%	18%	30%	13%	18%	15%	13%	16%
Pineapple	12%	18%	12%	24%	14%	7%	22%	10%	21%	13%	17%	21%	15%	16%
Blueberries	18%	15%	19%	18%	6%	11%	15%	21%	15%	19%	14%	19%	8%	15%

KANTAR

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N=	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
	292	300	295	296	300	299	296	221	294	294	287	306	40

Hort Innovation

Table Grapes

What does premium quality mean to you?

	UK	USA	SP	India	Japan	Korea	ML	HK	Taiwan	VT	ID	UAE	Qatar	Av
Fresher	39%	38%	38%	42%	20%	34%	46%	48%	39%	50%	46%	38%	40%	40%
Sweeter	30%	33%	37%	30%	31%	41%	32%	42%	40%	38%	36%	25%	30%	34%
More flavour	34%	27%	14%	24%	21%	25%	17%	43%	18%	23%	30%	22%	10%	24%
Right state of ripeness	32%	30%	20%	27%	9%	14%	21%	21%	27%	27%	27%	20%	25%	23%
Organic / free from pesticides	17%	18%	21%	33%	9%	25%	27%	11%	28%	30%	34%	23%	13%	22%
Higher in vitamins and minerals	7%	15%	17%	30%	8%	8%	30%	14%	23%	30%	32%	21%	23%	20%
More appetizing (e.g. not bruised, damaged)	22%	15%	20%	17%	12%	16%	20%	14%	19%	34%	26%	18%	18%	19%
I trust its safety	6%	19%	19%	28%	14%	13%	20%	16%	16%	21%	27%	21%	23%	19%
Larger than normal	14%	19%	14%	16%	12%	17%	25%	10%	14%	18%	27%	12%	15%	16%
Lasts longer	23%	21%	15%	18%	4%	5%	17%	9%	7%	22%	21%	19%	18%	15%

KANTAR

Source: Kantar HIA International Demand Study 2023

	UK	USA	Singapore	India	Japan	Korea	Malaysia	Hong Kong	Taiwan	Vietnam	Indonesia	UAE	Qatar
N=	292	300	295	296	300	299	296	221	294	294	287	306	40

Hort Innovation