

KANTAR

Hort Innovation

Understanding International Consumer Demand

Malaysia Market Report

2023



Hort
Innovation





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.

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1. Background and Objectives

The project context, objectives, approach and methodologies

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 consumers in these critical markets

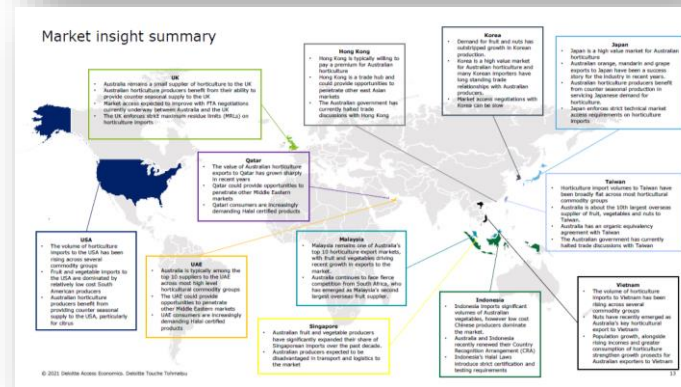


The Deloitte report

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

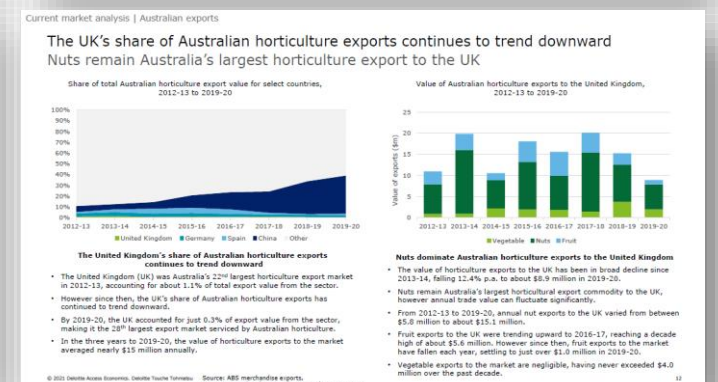
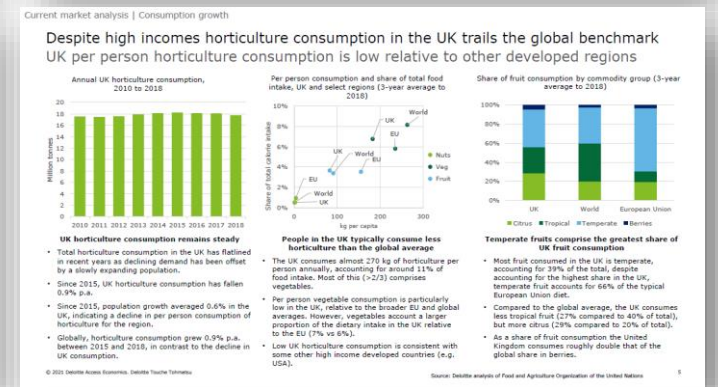
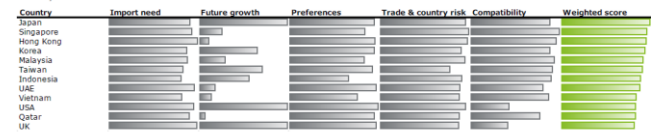
The Market Analysis then dove into each markets' import potential, based on existing market sizes, trajectory and the competitive landscape

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.



Identification of key markets

Final 12 markets selected from the criteria for more detailed current and future market analysis to be undertaken



A photograph of a grocery store vegetable section. In the foreground, there are several baskets filled with fresh green leafy vegetables, including spinach and lettuce. The background shows more produce, including what appears to be yellow bell peppers and other vegetables, slightly out of focus. The lighting is bright, typical of a grocery store.

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 commodities that have the strongest right to play within each market
- This is about optimising export & product positioning today and in to the future in order to drive growth against prioritised industries and facilitating the deployment of effective & 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



USA



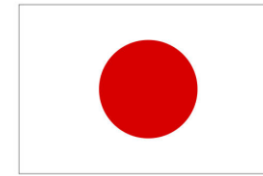
UK



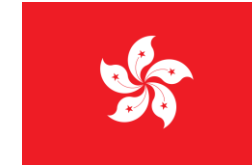
Singapore



India



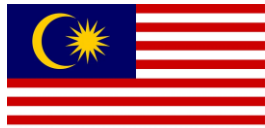
Japan



Hong Kong



South Korea



Malaysia



UAE



Qatar



Taiwan



Vietnam



Indonesia

The 20 industries of interest in the study



Almond



Apple & Pear



Avocado



Blueberries



Cherry



Citrus



Dried Grapes



Lychees



Macadamia



Mango



Melons



Olives/Olive Oil



Onion



Potatoes



Raspberries
& Blackberries



Strawberries



Summer fruit



Sweet Potato



Table Grapes



Hard Veg,
Fruiting Veg & Leafy Veg

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

Internal stakeholder interviews

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

Knowledge audit

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



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
- 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



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

Market report contents

	CHAPTER	CONTENT
1	Key insights	Headline report findings
2	Introduction	Project context, research question, objectives and methodologies
3	Market foundations	Key fresh produce market dynamics, drivers of consumer behaviour and essential 'need to knows' straight from the in-country retail and import experts
4	The Consumer	Consumer values and attitudes to food and fresh produce, plus, shopping preferences and typical behaviours
5	Commodity consumption	Deep dive into data profiling the priority fruits, vegetables and nuts consumption moments to illuminate how the fresh produce is typically consumed in market
6	Commodity prioritisation	Leverage the strategic framework to prioritize commodities based on consumer behaviour and perception
7	Strategic consumer recommendation	Recommendations on how to go after growth opportunities, based on consumer needs, triggers & barriers
8	Appendix	Commodity groupings & market Demand Space framework



2. Market foundations

Key fresh produce market dynamics, drivers of consumer behaviour and essential 'need to knows' straight from the in-country retail and import experts

Malaysia expert interviewees



Adrian Ung

Most recently, General Manager of Marketing at Chop Tong Guan, a leading fresh fruits importer and distributor in Malaysia (2019 – 2020)

15+ years industry experience

Chop Tong Guan (CTG) is a leading fresh fruits importer and distributor in Malaysia and has been operational since 1929. Before that, Adrian spent over 9 years at Euro-Atlantic – leading importer and distributor of fresh produce – as the General Manager of Marketing (2010 – 2019). He is experienced in overseeing marketing departments, branding, creative marketing, paid media advertisement, planning and strategic partnerships.



Thomas lee wai Kong

Head of Distribution, Fresh Market (2017 – present) at Jaya Grocer, a premium grocery store with 40 stores across Malaysia

15+ years industry experience

Skilled in retail and management, Thomas oversees procurement for fruits and vegetables, as well as managing the fresh market distribution centre. Previously, Jaya Grocer Fruit & Vegetable Operation Manager where he spearheaded a strategy to rebuild the selling floor layout and merchandising, led the buyers team and developed signature products. Prior to this he was involved in Grabmart, a key platform for On Demand Delivery and General Manager at MBG Fruits SDN (2009 2017).

Malaysia expert interviews: Key observations



Malaysia is open to imports

Malaysia has domestic production of fruits and vegetables but is also a strong import market. A slightly high % of fruits are imported vs. vegetables, and they come from all over the world. The Malaysian market is very open to imports.



Imports are driven by food safety concerns

Food safety is a concern for some consumers as domestic controls on pesticides and herbicides are not as stringent as imported produce. Australia in particular is seen as having tight restrictions on pesticide use which makes its produce attractive to import.



Consumers are starting to look beyond price

Retailers are seeing this in-store at high-end retail chains where consumers are willing to pay slightly more for premium quality produce. Quality in Malaysia means large fruit that's sweet and has a uniform colour.



Australia trades on its quality reputation

Australian produce can be found in the mid- and high-income segment supermarkets. Consumers know that the produce is higher priced, but it's also high quality and considered to be produced to a high food safety standard.

Malaysia has domestic production of fruits and vegetables but is also a strong import market.

“ Around 60% [of produce] comes from local [producers], 40% is from overseas.

- Thomas Lee Wai Kong

“ We can import from 95% of the world. Only 5% of all the countries we can't import from. Regulation is not a problem.

- Thomas Lee Wai Kong

“ The problem is caused by the shipping. Sea shipments are facing a delay. The availability of the transport company is very limited and the cost is very high.

- Thomas Lee Wai Kong

“ The biggest country that exports to Malaysia is U.S., China, Korea and also South Africa and Egypt.

- Thomas Lee Wai Kong



Consumers turn to imports when faced with concerns about food safety

“ Australian produce is pretty safe compared to the Cameron Highlands. The Cameroons are farming the vegetables, they use a lot of pesticides.

- Thomas Lee Wai Kong

“ There's pesticide-free trend. You don't get the organic certification, but the cost is lower. Australian produce has been growing because of the food safety. The standard in Australia is better compared to Malaysia.

- Thomas Lee Wai Kong



Consumers are looking beyond price. Quality – indicated by size, color and branding – is key

“ So when the new generation’s lifestyle improved, they started looking for more good produce instead of just price. And now we’re at a junction with inflation, but the consumer, they’re still willing to pay more for a better product.

- Thomas Lee Wai Kong

“ The branding is very, very important. It's a key element of why the consumer is willing to pay more. When they buy orange, they have to look for Sunkist. You buy kiwi, you have to look for Zespri.

- Thomas Lee Wai Kong

“ The first thing actually we're looking for is the quality, but we have to find a balance between price and quality... The size and colour of the fruit is very important, and also the sweetness.

- Thomas Lee Wai Kong



Consumers are buying premium produce and Australia is a favorable market with a strong reputation for quality

“Australia produce, it's more aimed for the high-end market, for the middle and the high-income [consumers], they don't want to buy the local veggies, they preferred the overseas veggies, especially the Australian broccoli, the celery, carrots, then the cauliflower.

- Thomas Lee Wai Kong

“We're importing Australian avocado, table grapes, then the Navel and the Valencia, all kind of peaches, stone fruit, also included are like those citrus, the tangerine, the mandarin. Australian product is very dependent on season.

- Thomas Lee Wai Kong

“Australia is the best choice because of the eastern is not very far and also the first-rate dealer, and in fact it's high level [produce] compared to our local veg.

- Thomas Lee Wai Kong

“High-end grocers are selling all the imported Australia fruits... Premium grocers expanded fast during the pandemic, people spent money on premium quality food. For [fresh] produce now, I believe around 60% goes to the high-end market.

- Thomas Lee Wai Kong

“When we talk about Australia, we know that the prices are generally higher compared to elsewhere, but they're quality. We import a lot of avocados from Australia, even though we can get Kenya avocados much cheaper.

- Adrian Ung



3. The Consumer

Consumer values and attitudes to food and fresh produce, plus, shopping preferences and typical behaviours

We will unpack 3 key themes to unpack consumers in Malaysia



Demographics

- Population, life expectancy
- GDP per capita and key wealth metrics
- Age breakdown
- Religious identity and background



Attitudes & values

- Attitudes & values relating to: food & cooking...
- Safety & sustainability
- Premium & value
- Local vs. imported
- Health & wellbeing



Shopping behaviour

- Grocery and fresh produce shopping behaviour
- Shopping preferences, including triggers and barriers
- Imported vs. local shopping behaviour



The population size & consumer wealth in Malaysia

POPULATION

33.5million

Malaysian population¹
vs. 25.7m Australians

49%   51%

female/male population split
vs. 50/50 globally

1.1%

Malaysian population per annum
growth (2021)¹
vs. 0.8% globally

WEALTH

\$373b

Malaysian GDP (USD)¹
vs. \$1.6t in Australia

\$11,109

Malaysian GDP/Capita (USD)¹ vs.
\$60k in Australia



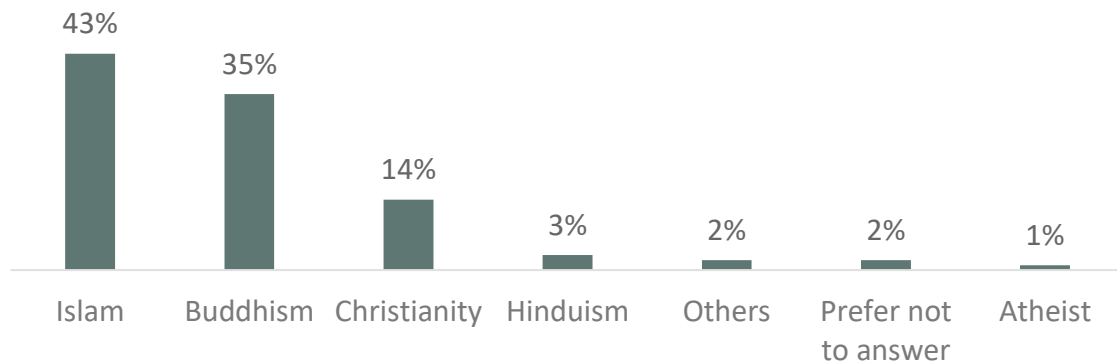
Unpacking the Malaysia survey sample

BACKGROUND

How would you describe your nationality/background?

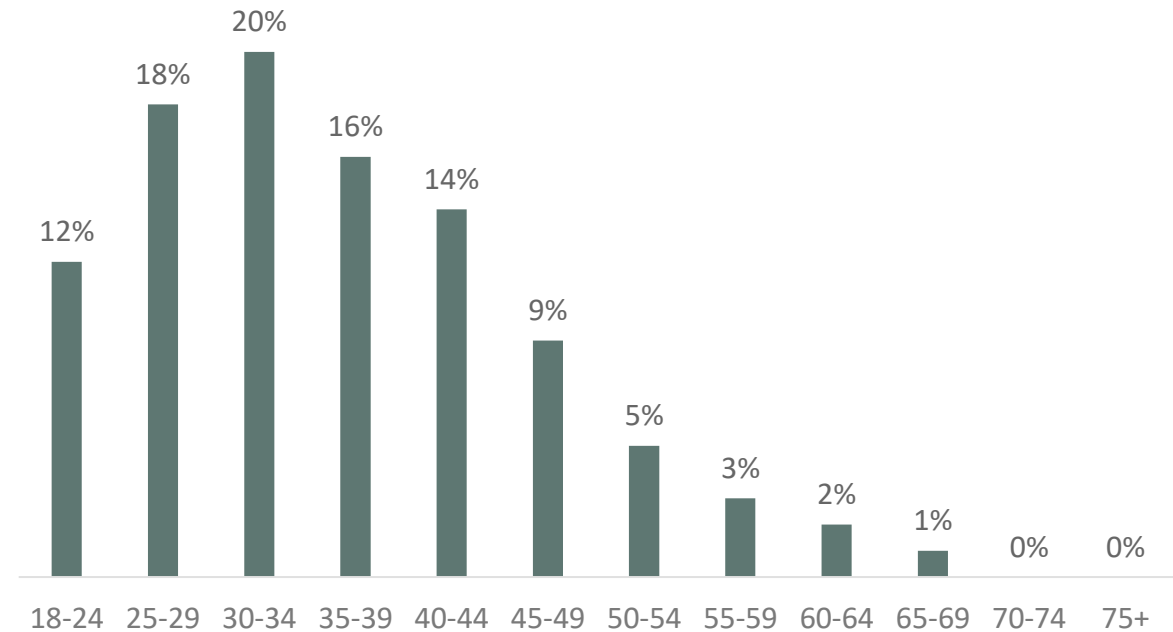
49% 'Chinese' population

How would you describe your religious identity?



AGE

How old are you?





Key attitudes & values of Malaysia consumers

Malaysia consumers love food & cooking and like new tastes

74%

Enjoy cooking

70%

I enjoy trying new tastes and cuisines

But enjoy simple pleasures and prefer tried and tested products

77%

Are happy with simple pleasures

64%

Wait until something is tried and tested

Food safety and the environment are concerns

83%

Worry about poor quality, toxic or contaminated food

78%

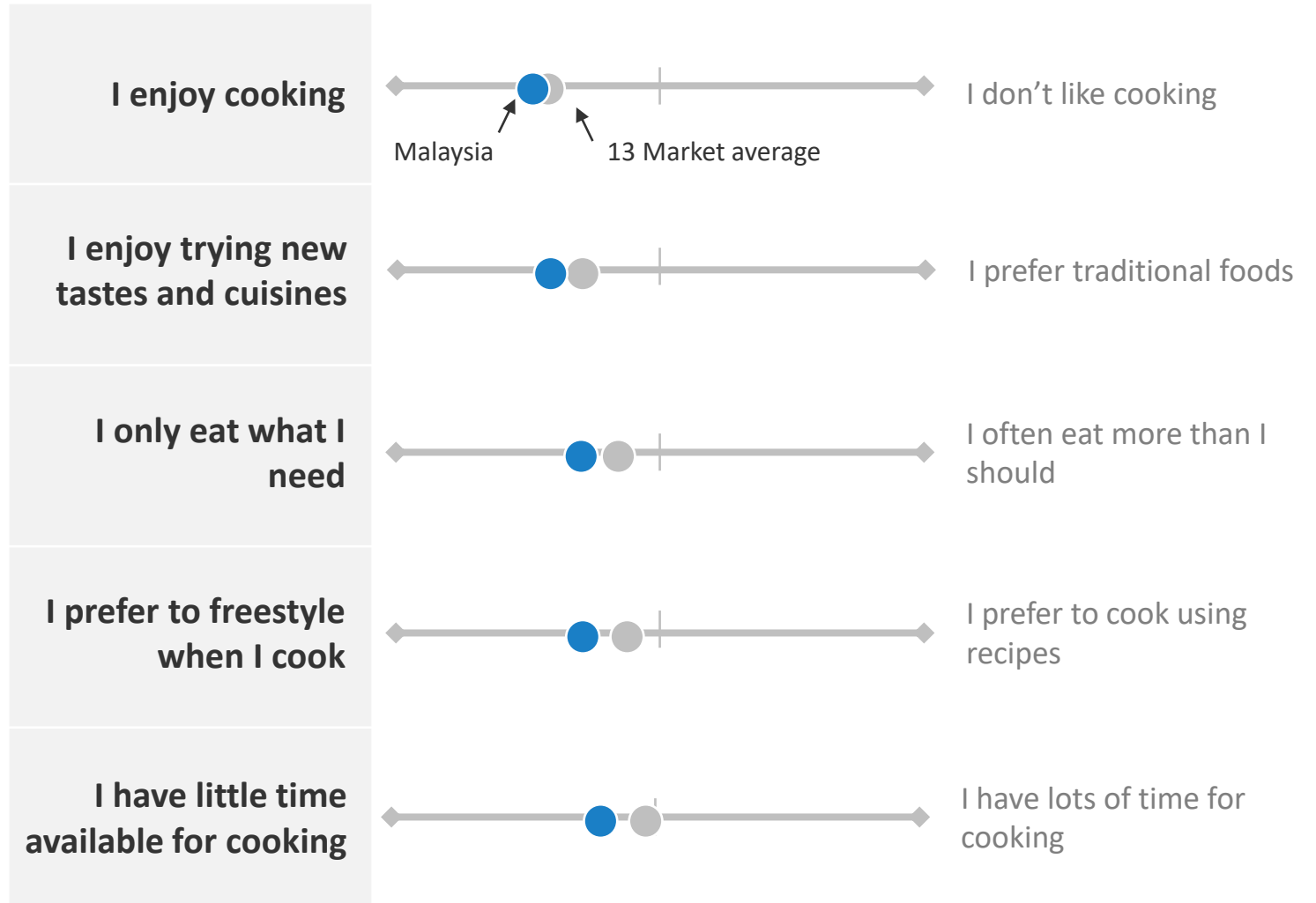
Tend to buy products that are better for the environment





“ I love cooking and find great pleasure in all types of food and cuisines though I only eat what I need. I don't always have the time to cook and when I do I tend to freestyle ”

Attitudes & values related to Food & Cooking

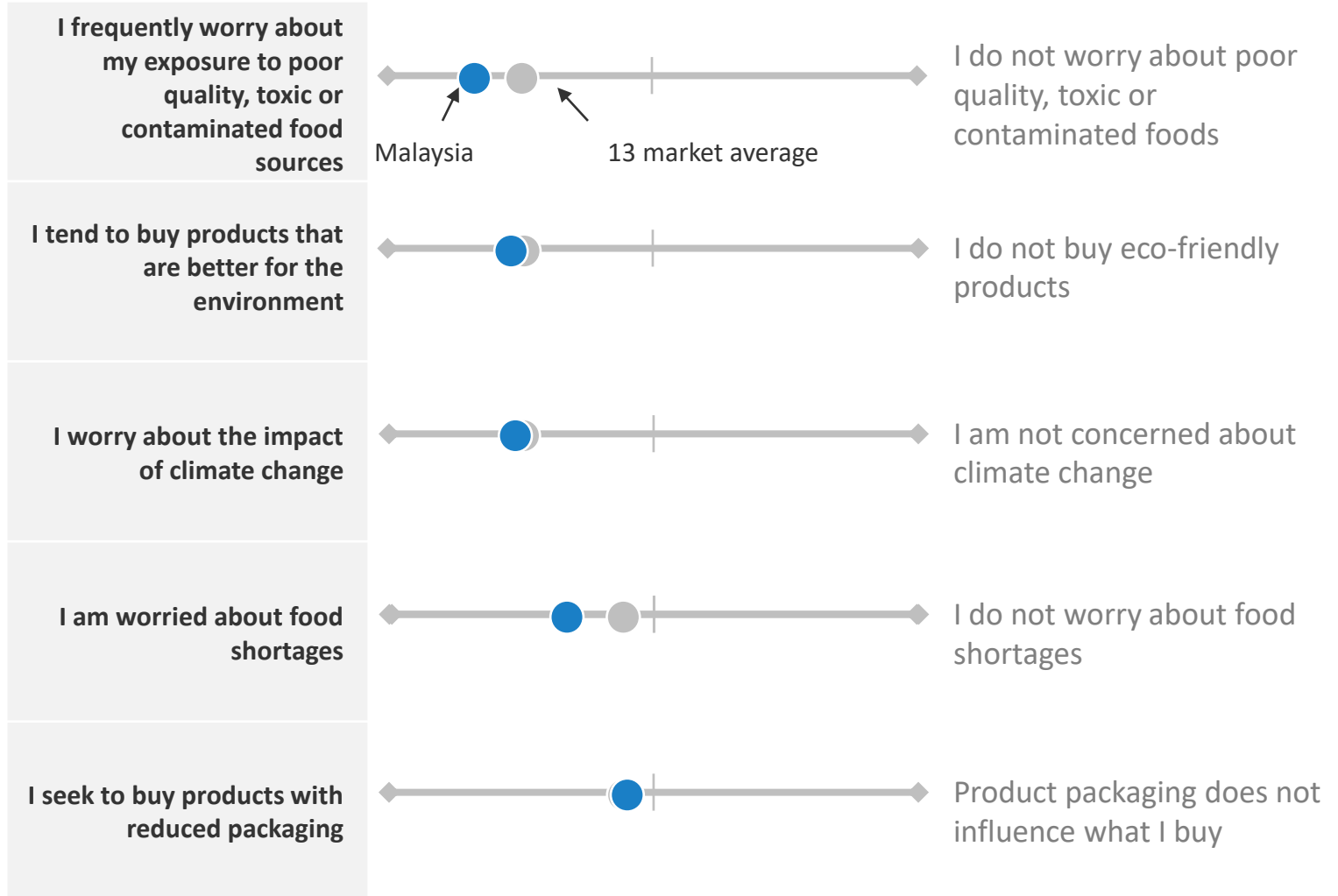


Question: Which of these statements appeals to you more?
Source: Kantar HIA International Demand Study 2022
n= 4046



“ Food safety is a major concern for me and I frequently worry about contaminated products. I try to buy products that are better for the environment and worry about climate change but reduced packaging is less of a priority ”

Attitudes & values related to Safety & Sustainability

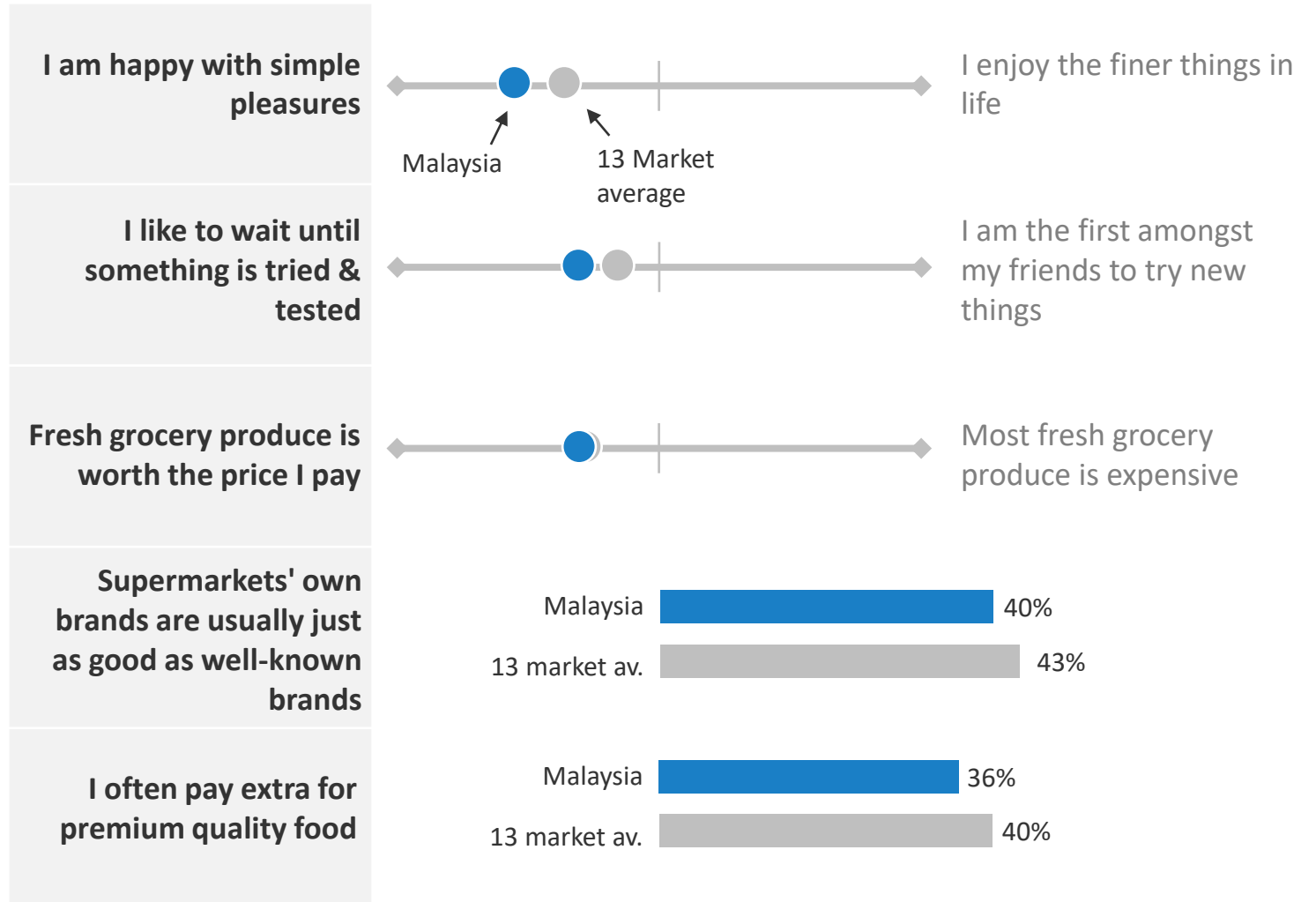


Question: Which of these statements appeals to you more?
Source: Kantar HIA International Demand Study 2022
n= 4046



“ I love a bargain and I rarely pay extra for good food since I can usually get good quality fresh produce at a fair price. I don't eat out that often and I am happy to cook at home ”

Attitudes & values related to Premium vs. Value



Question: Which of these statements appeals to you more?
 Source: Kantar HIA International Demand Study 2022
 n= 4046

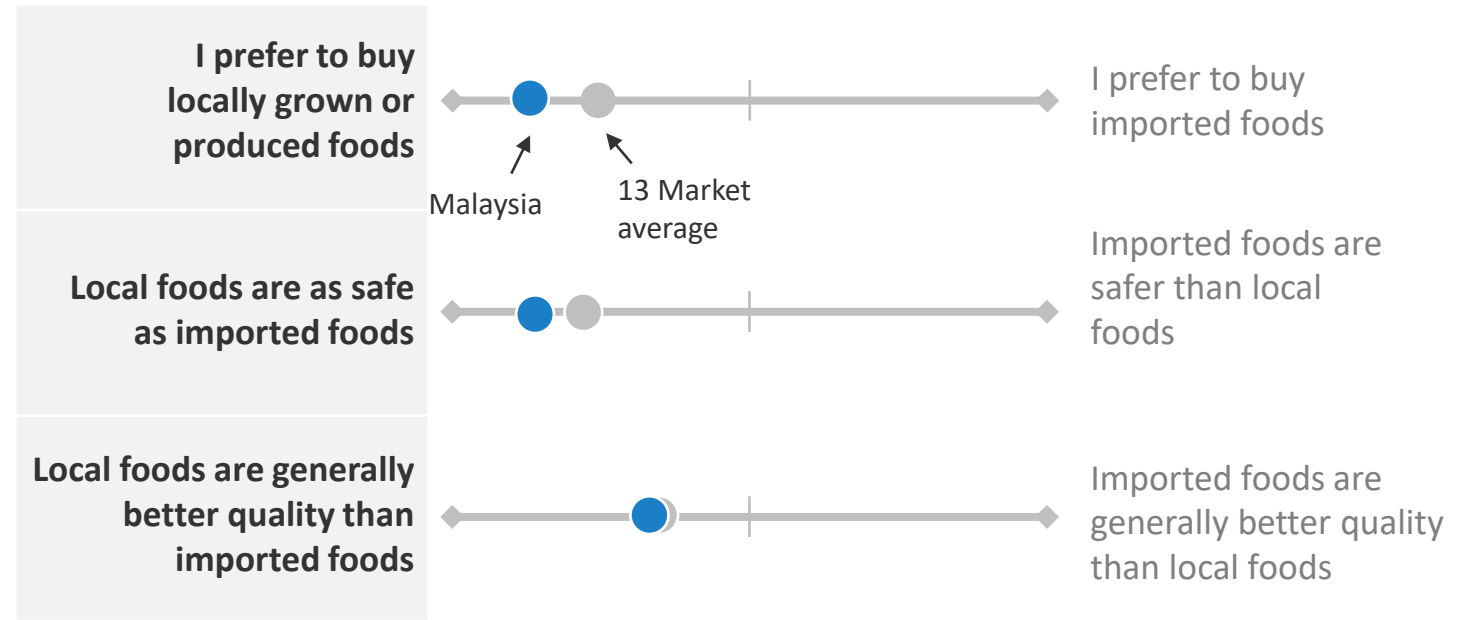


“ If I can I **will buy local foods** as they must have come from a farm closer than anything imported, so the **quality** must be better.

I consider local foods as **safe** as imported alternatives

”

Attitudes & values related to **Local vs. Imported**



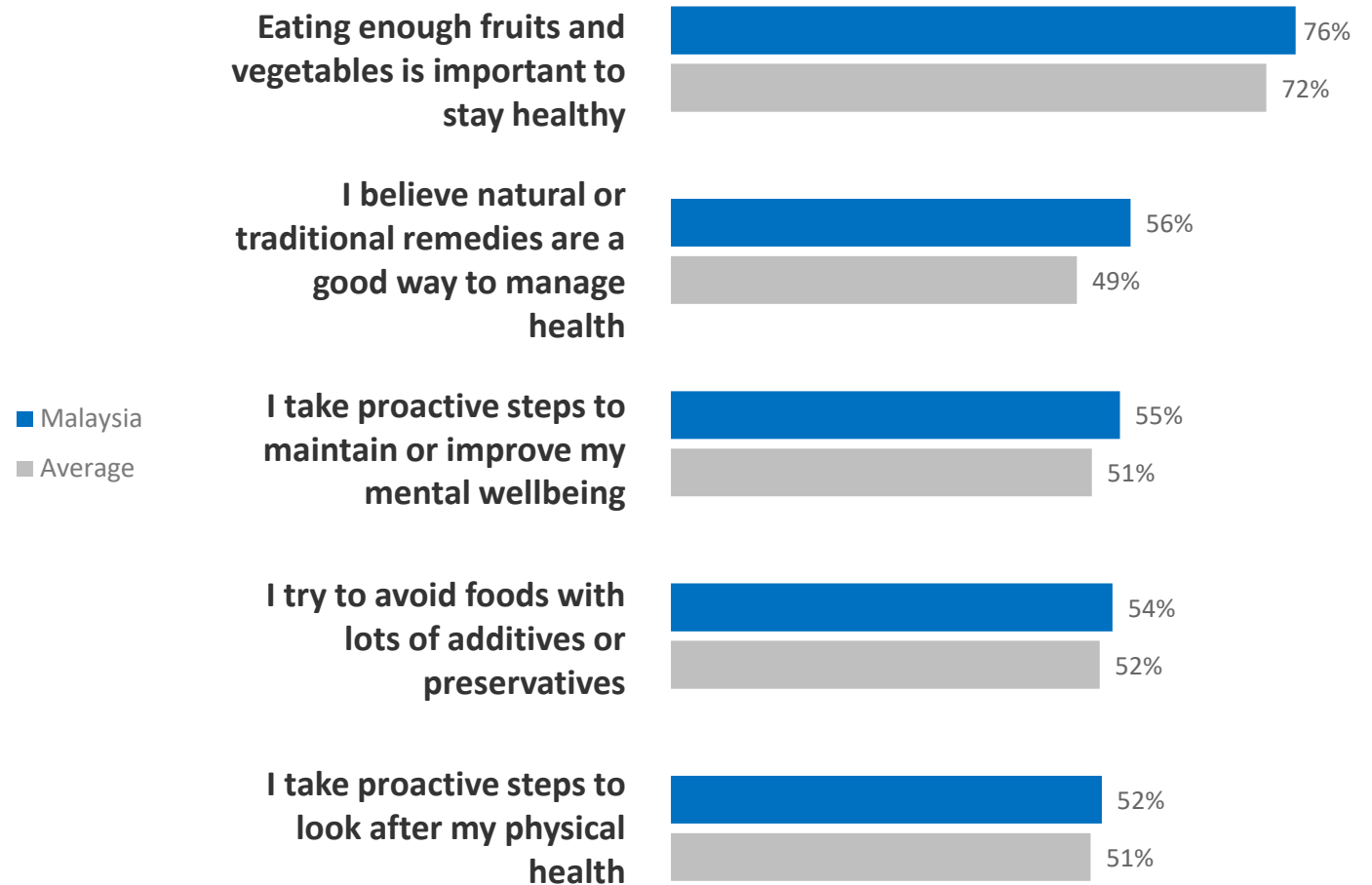
Question: Which of these statements appeals to you more?
Source: Kantar HIA International Demand Study 2022
n= 4046


Attitudes & values related to Health & Wellbeing

“ Eating enough fruits & vegetables is important to me...

I take proactive steps to improve physical health and mental wellbeing, including traditional remedies and avoiding additives

”



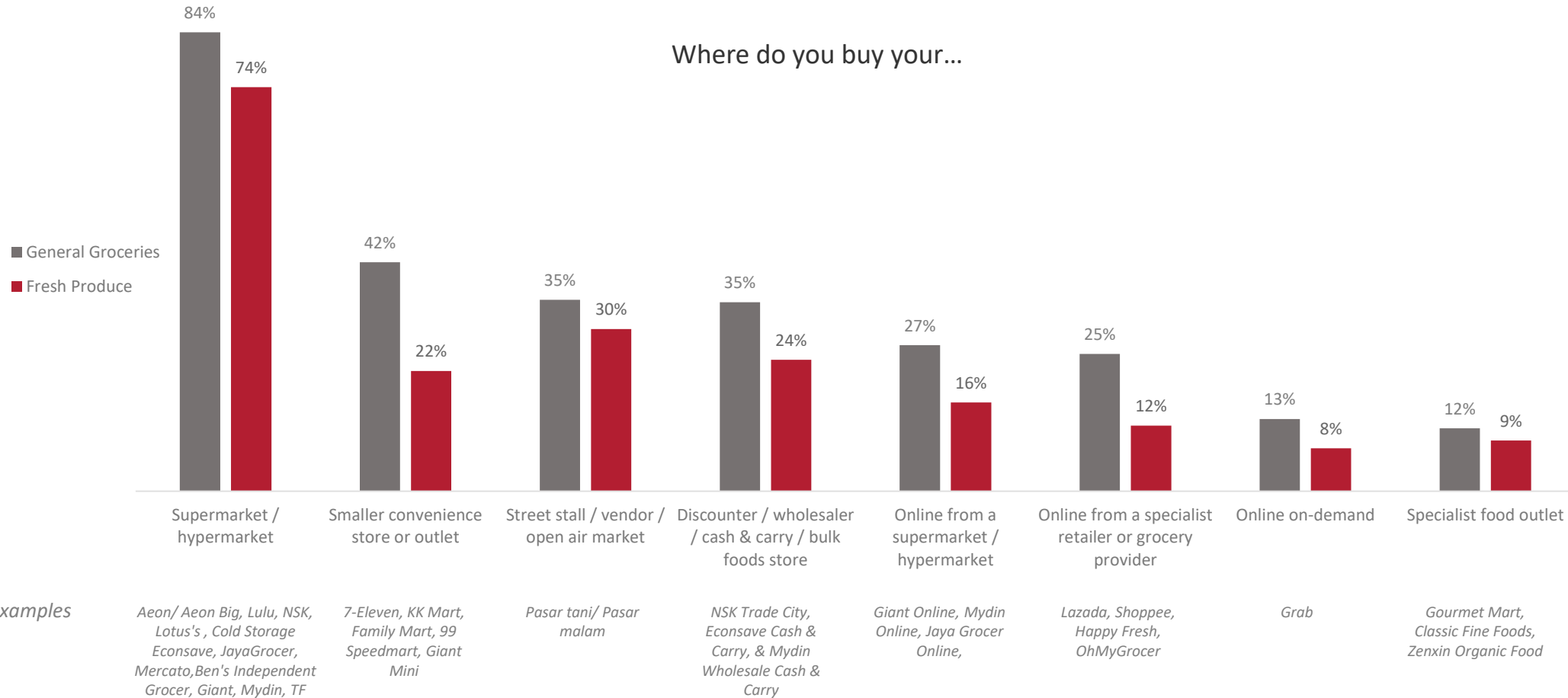


Now we know a little
about what motivates
consumers we will dive
into how they shop



Supermarkets dominate in Malaysia for both general groceries and fresh produce, open markets & street stalls are also popular channels

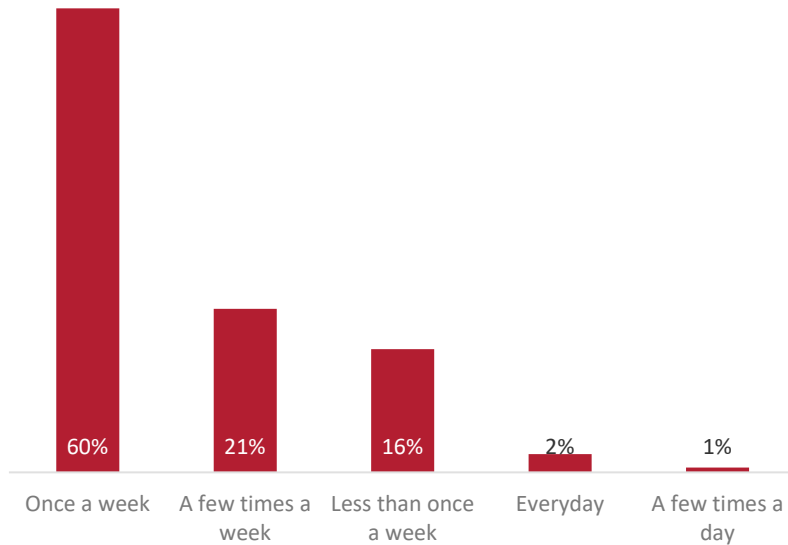
Where do you buy your...



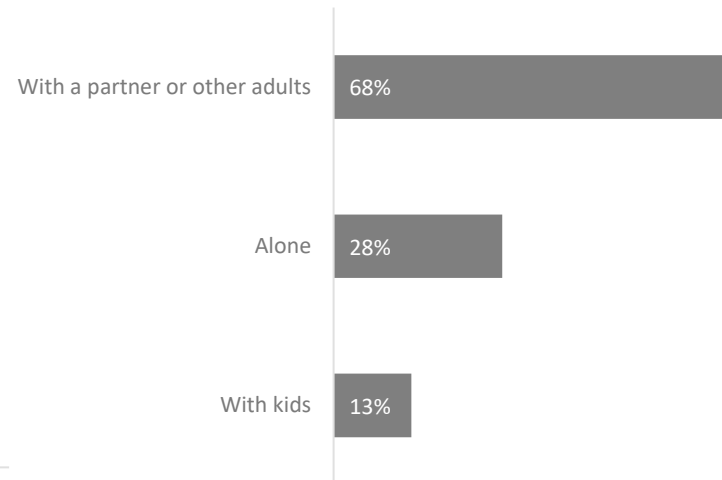


The vast majority (60%) are shopping once a week for fresh produce. Adults typically shop with a partner and where they have kids in the household, a third of fresh produce is for them

How often do you shop for fresh produce?



With whom?



How much are the kids having?

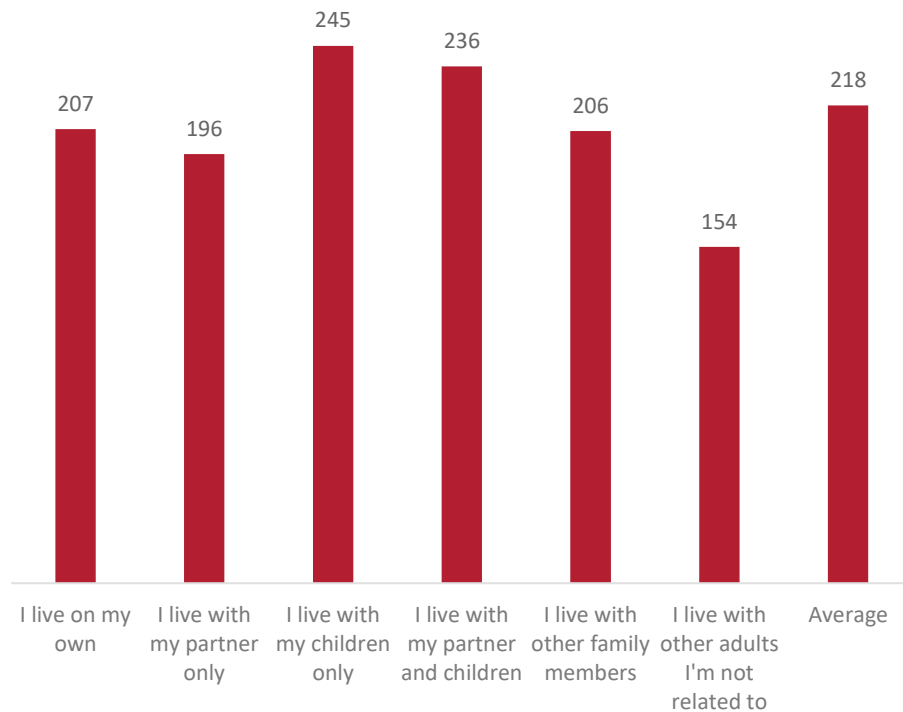
36%

Estimated share of fresh produce bought by the household that is eaten by people under the age of 18



Most households are spending less than 250 Malaysian Ringgit (approx. \$80 AUD) on groceries a week, of which about 40% is on fresh produce

In a typical week, how much do you spend on groceries (by household structure)? *Malaysian Ringgit*



How much do you spend on fresh produce?

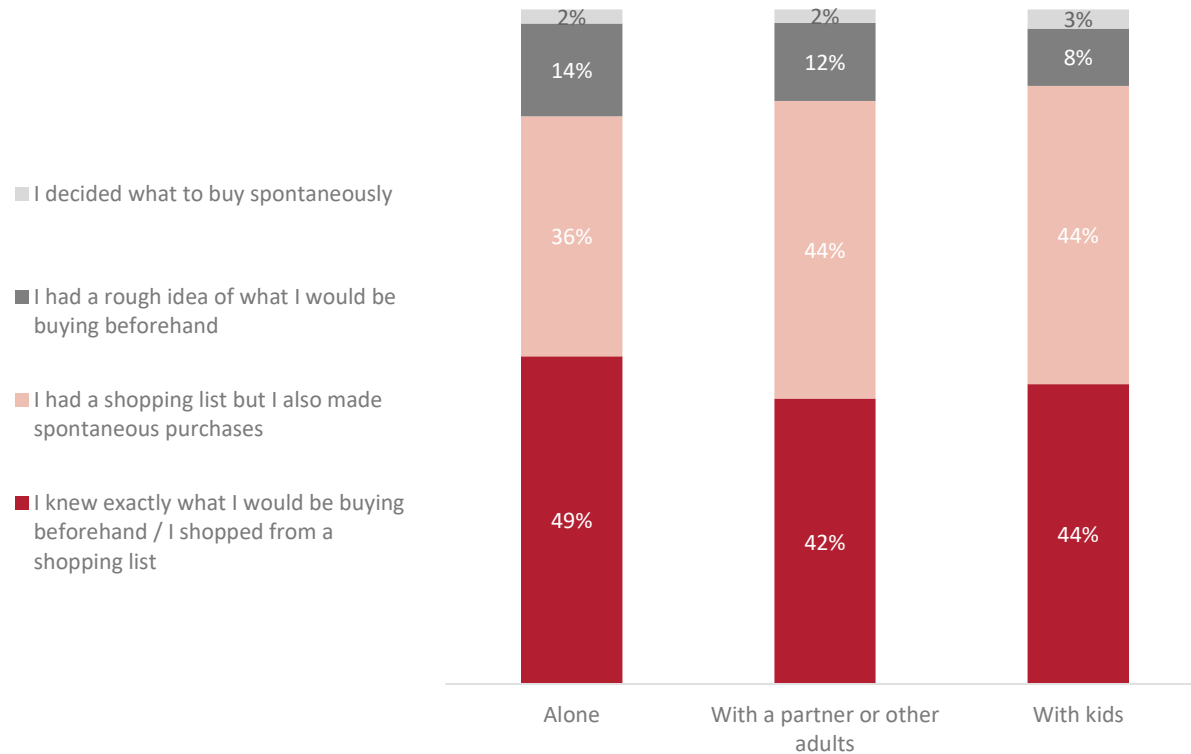
42%

Estimated share of grocery cost spent on fresh produce specifically in a typical week

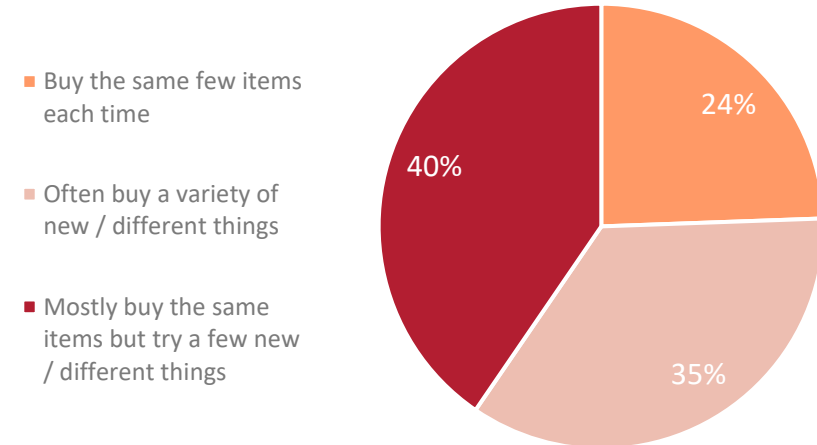


Consumers are typically shopping from a list, regardless of who they are with. **When it comes to fresh produce, there's a relatively even split between people buying the same items vs. trying new things.**

Which would you say describes your shop when shopping...



When shopping for fresh produce do you...





Price is the strongest driver of fresh produce purchase. But consumers are also buying to both satisfy the household and are concerned about food safety

When shopping for fresh produce what determines your choice?



Giftng is not a strong driver of choice in Malaysia. Only 3% of people buy fresh produce 'for a gift'.

What would encourage you to purchase fresh produce you wouldn't normally buy?

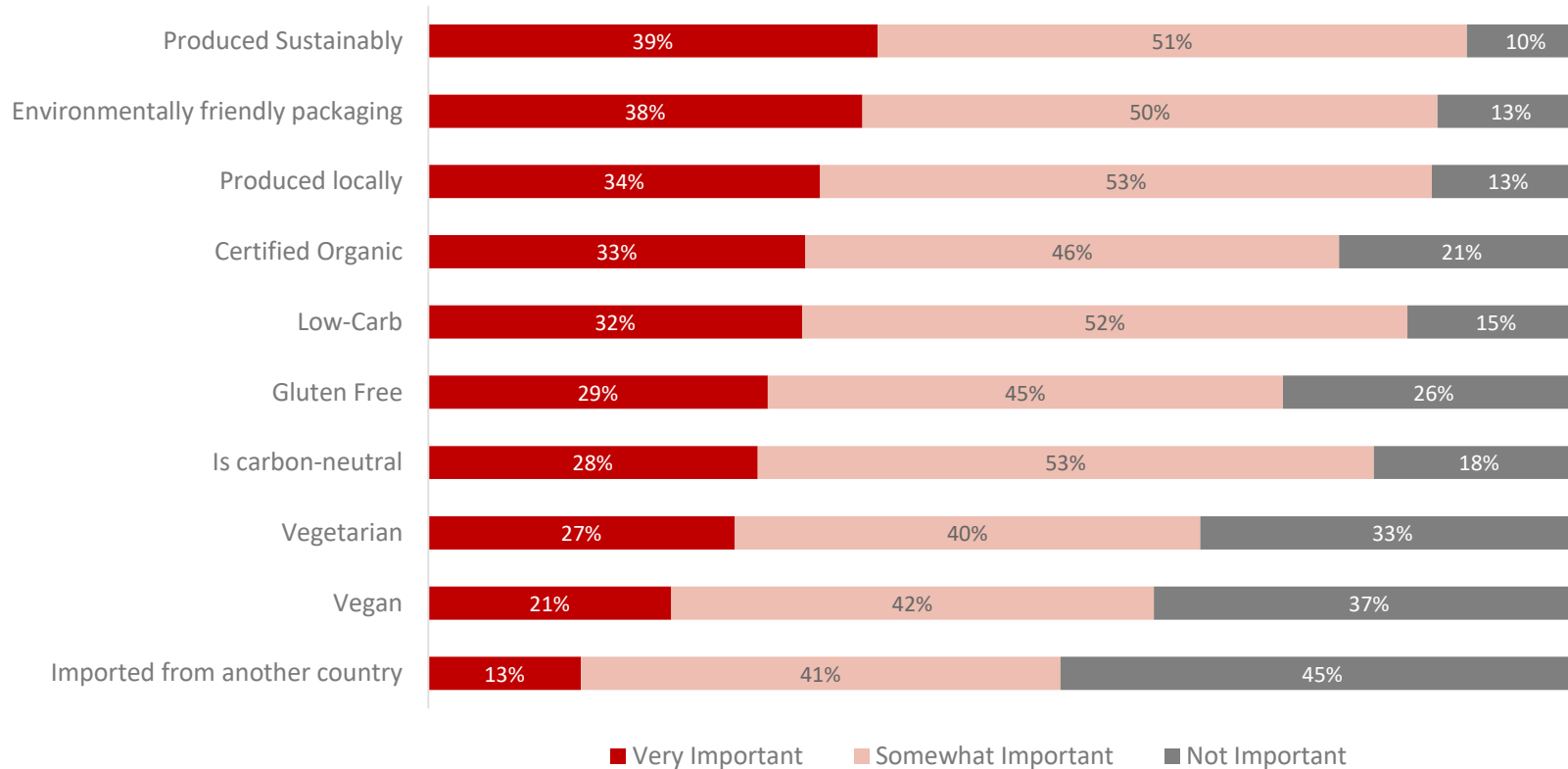




Sustainable production is important for people when purchasing groceries.

Environmentally friendly packaging and local production are the top ranked factors

How important are the following when purchasing groceries?

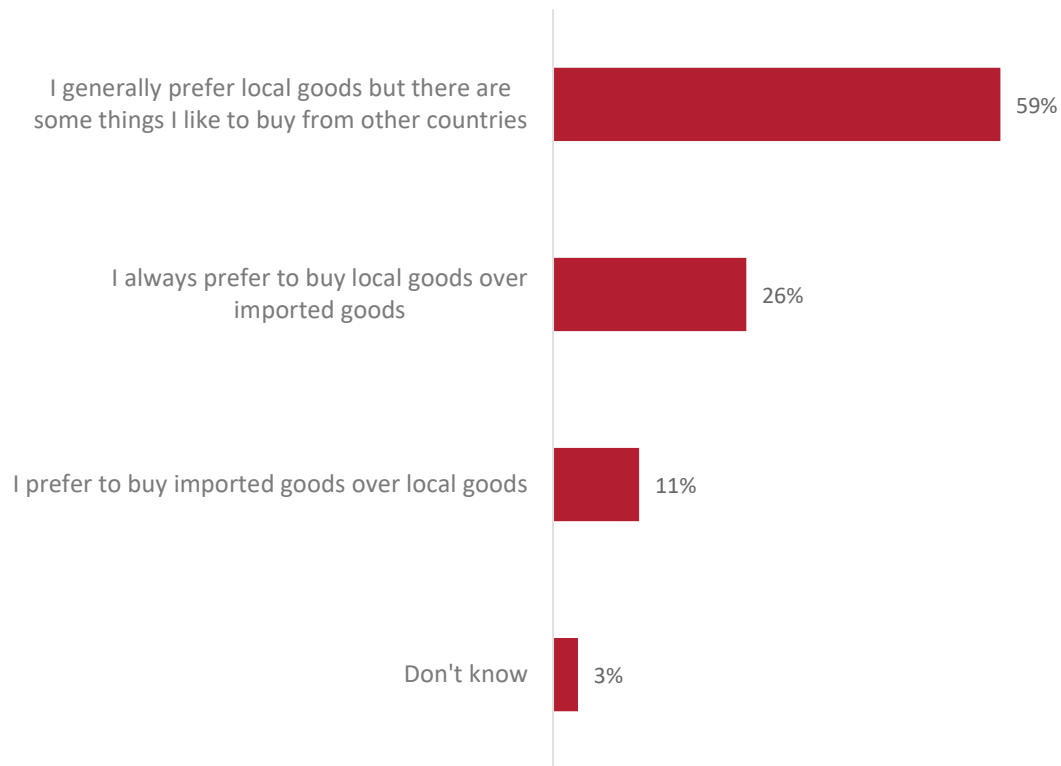




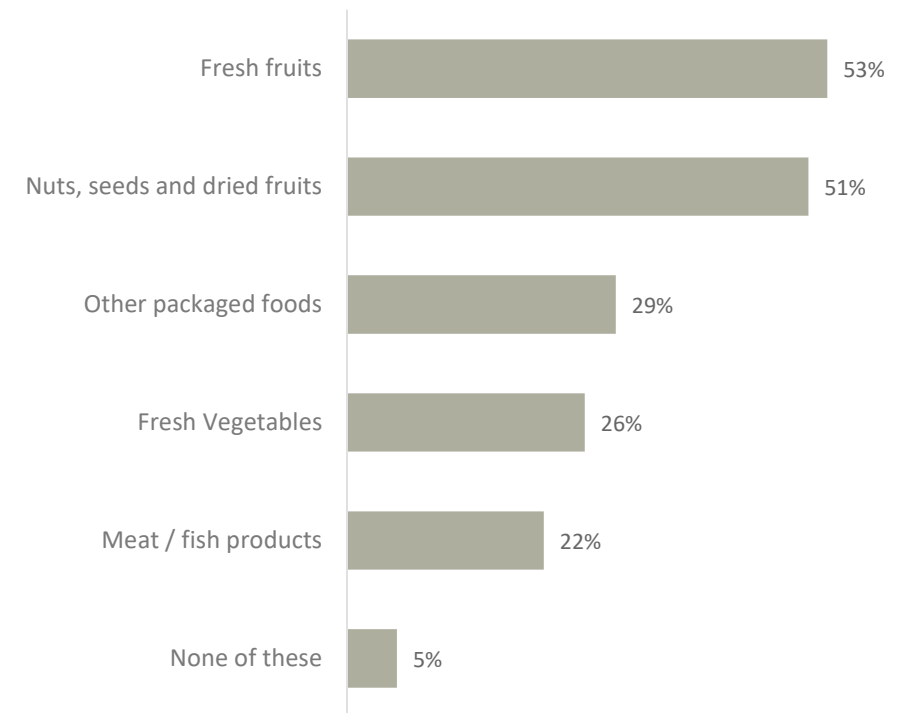
Nearly 60% of Malaysian consumers claim to have a preference for local goods, but only a quarter always prefer to buy local.

Fresh fruits are the most popular choice of imported produce

Preferences for Import vs Local



What food products are you most likely to choose an imported option?



Key consumer take-aways



Malaysian consumers think that food is a pleasure, but worry about contaminated food and food shortages more vs. other markets

However, they still think that domestic produce is as safe as imported produce.



Supermarkets and hypermarkets are the leading grocery and fresh produce channel

However, open air markets are still popular, along with online channels and discounters



The price of the produce is the leading ranked purchase driver in Malaysia

Whilst this one factor dominates, people are also mindful of having something that their HH will eat and that's safe



When it comes to more nuanced factors, consumers are more environmentally-minded vs. local

They want 'sustainably produced' and produce with 'environmentally friendly packaging'



The vast majority of people consumers 'generally' prefer local goods but still buy some things imported

Fresh fruit and nuts and seeds are more appealing imports to consumers than vegetables, meat or fish

4. Commodity Consumption

Deep dive into data profiling the priority fruits, vegetables and nuts consumption moments to illuminate how the fresh produce is typically consumed in market

Key Findings Commodity Consumption

		FRUITS	NUTS & SEEDS	VEGETABLES
	How often	96% penetration	94% penetration	96% penetration
	When	As a snack or dessert	Mostly as a snack (62%)	At dinner or lunch
	How	Fresh on its own	As part of a snack , fresh on its own	As an ingredient in cooking , cooked on its own
	Where	At home	At home	At home
	Who with	With my spouse/partner , with parents or family group	With my spouse/partner , by myself , with parents or family group	With my spouse/partner , with parents or family group

The 13 fruits of interest



Apple & Pear



Blueberries



Cherry



Citrus



Lychees



Mango



Melons



Raspberries
& Blackberries



Strawberries



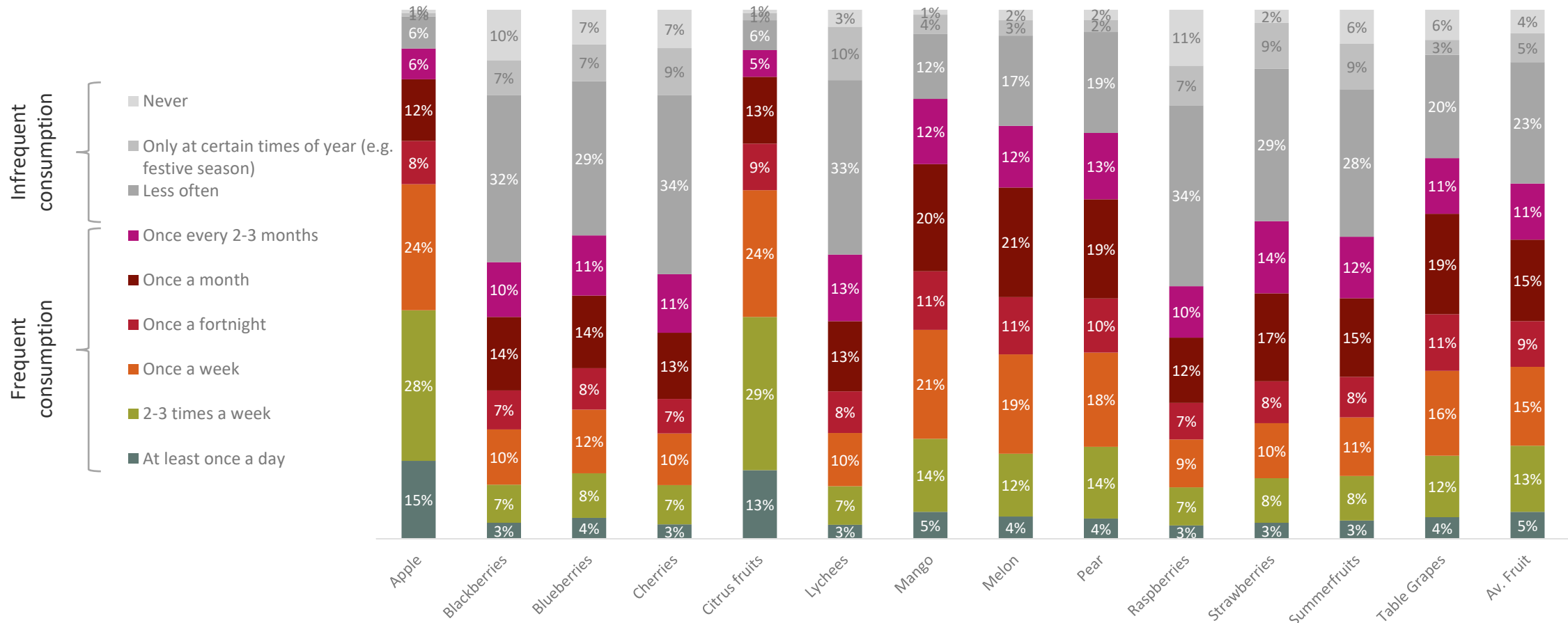
Summer fruit



Table Grapes

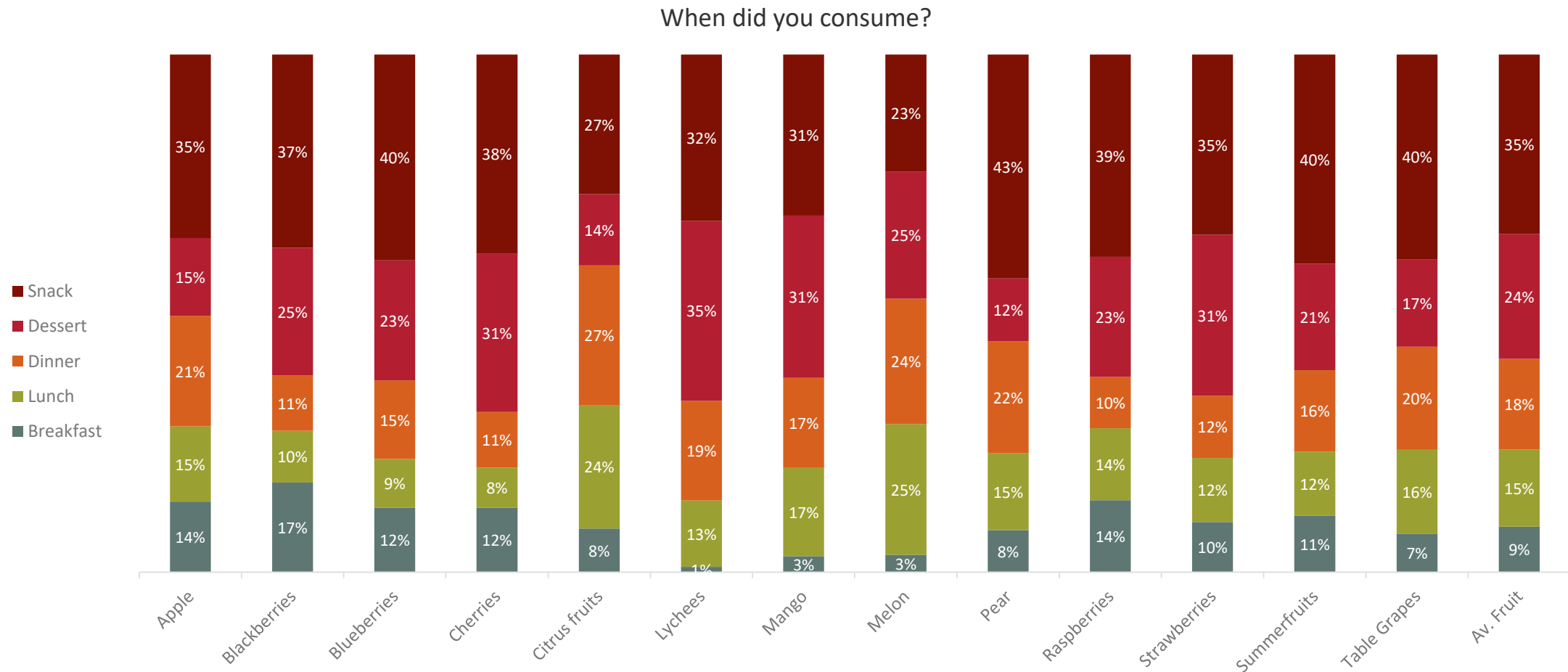
Apples, citrus fruits, mango, melon and pear are most commonly eaten in Malaysia with other fruits still highly penetrated but consumed less frequently

How often do you consume each commodity?





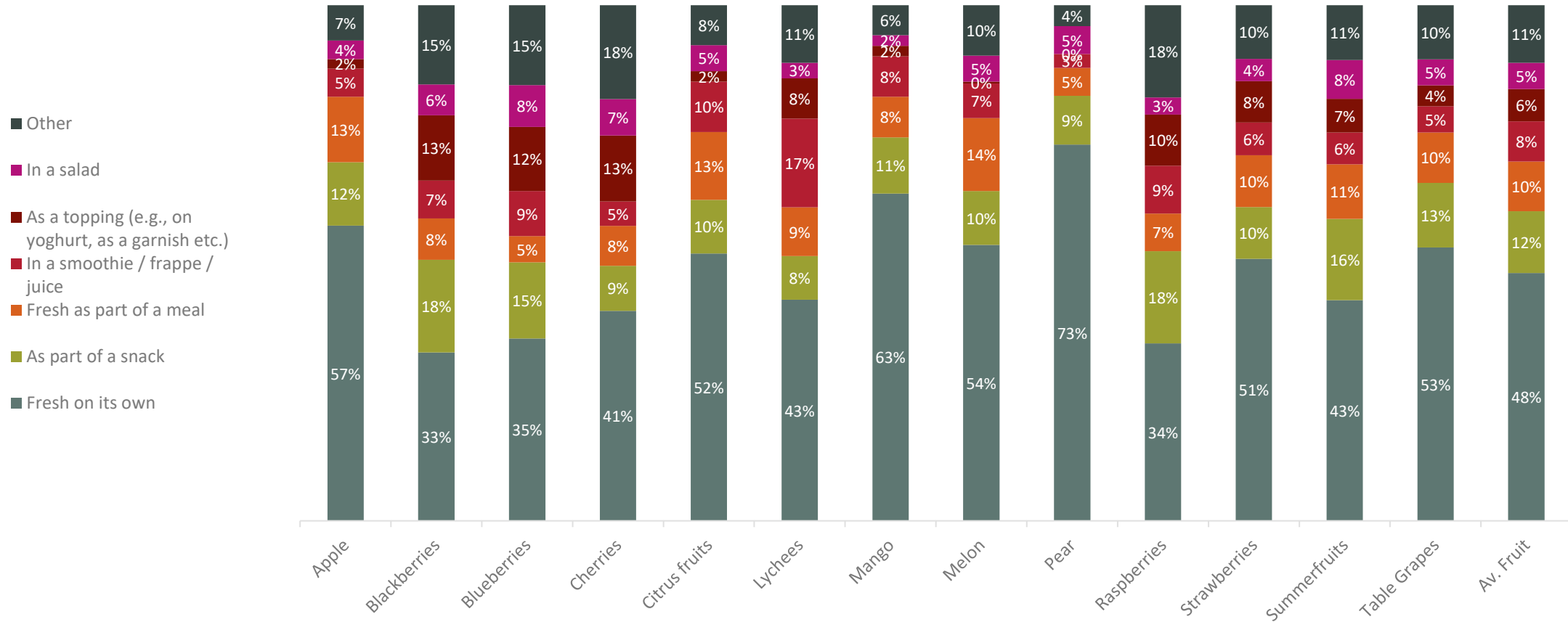
Fruit is consumed across the day with some variations between fruit. Snacking is typically the most common occasion





Fruits are generally consumed fresh on their own, this is especially true of pears, mango and apples

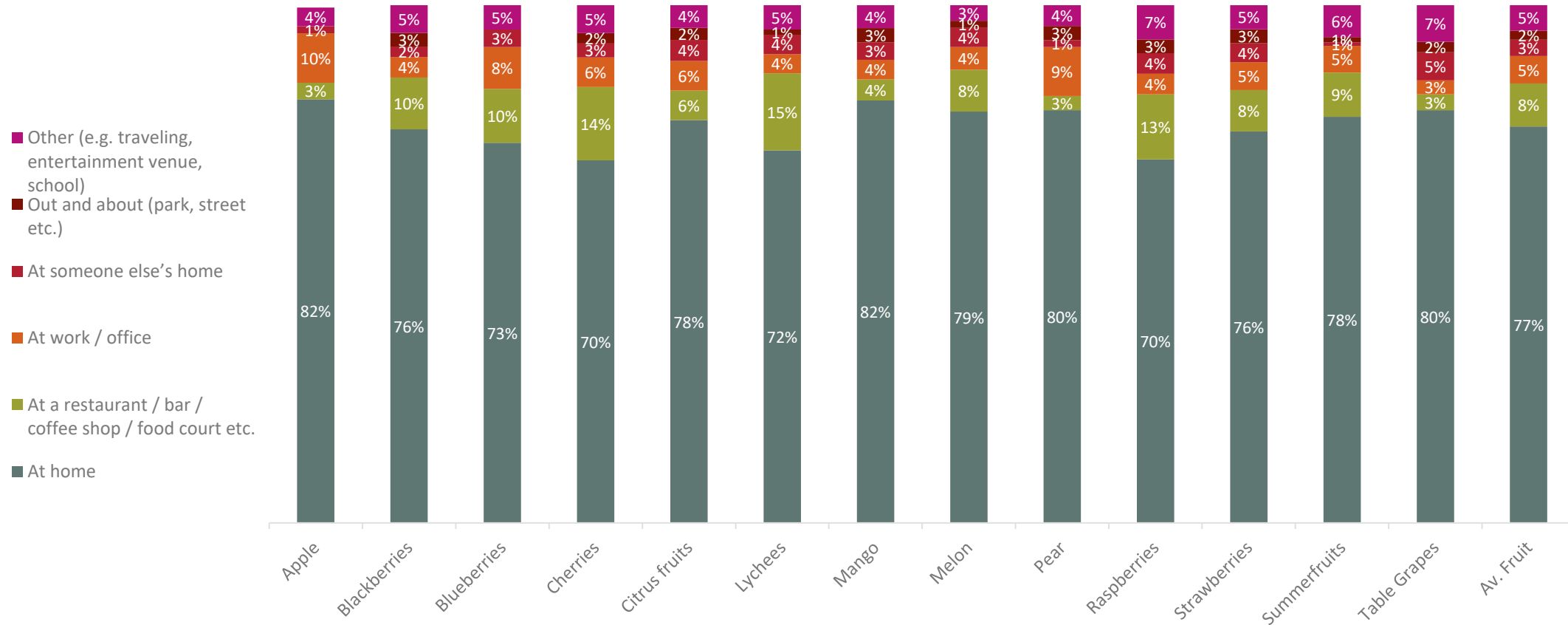
How did you consume?





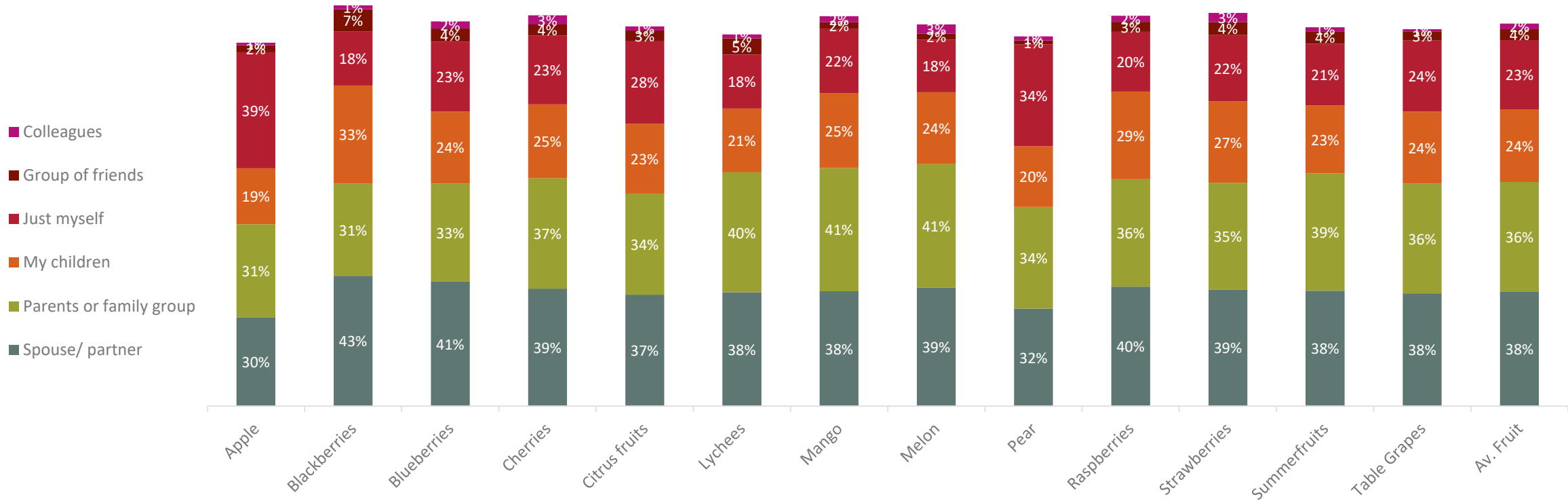
Fruit in Malaysia is mostly consumed in the home. The second ranking location is restaurants, bars and coffee shops followed by work

Where did you consume?



Fruit is consumed when with spouse / partner, parents or family group or children; it is also consumed less often alone

Who were you with?



The 3 nuts & dried fruits of interest



Almond



Macadamia

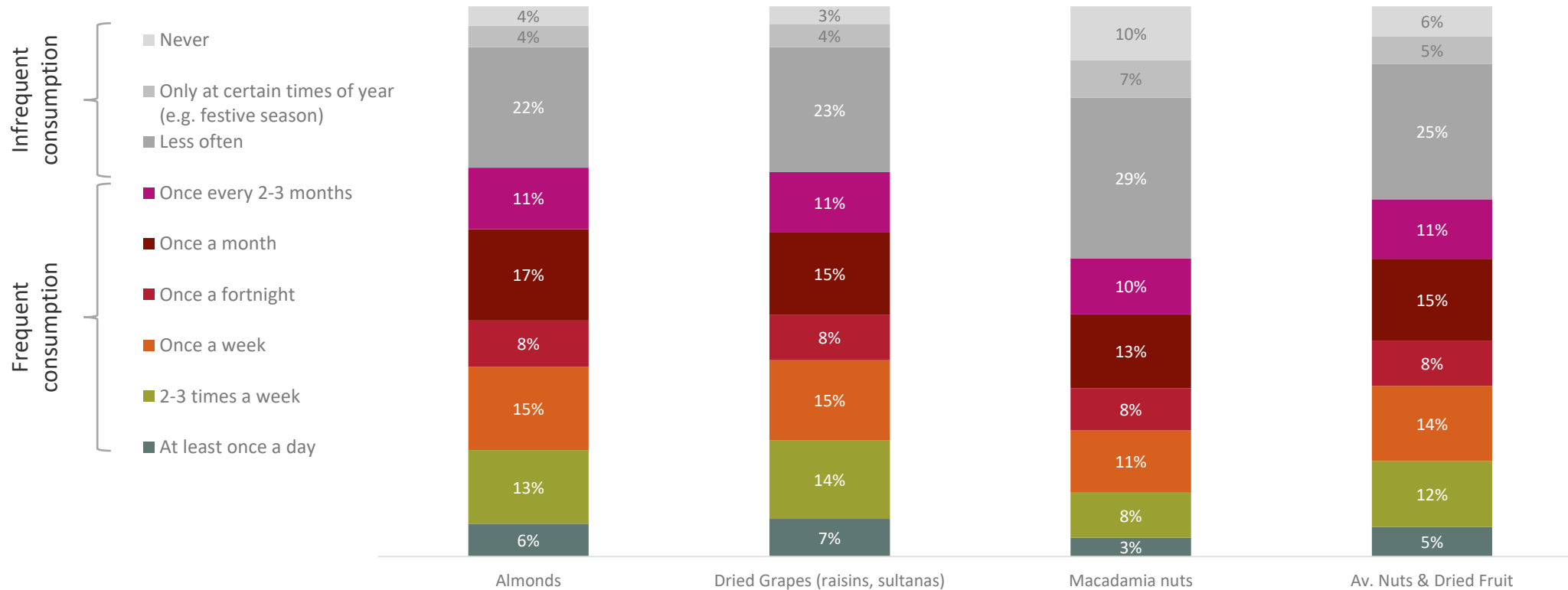


Dried Grapes

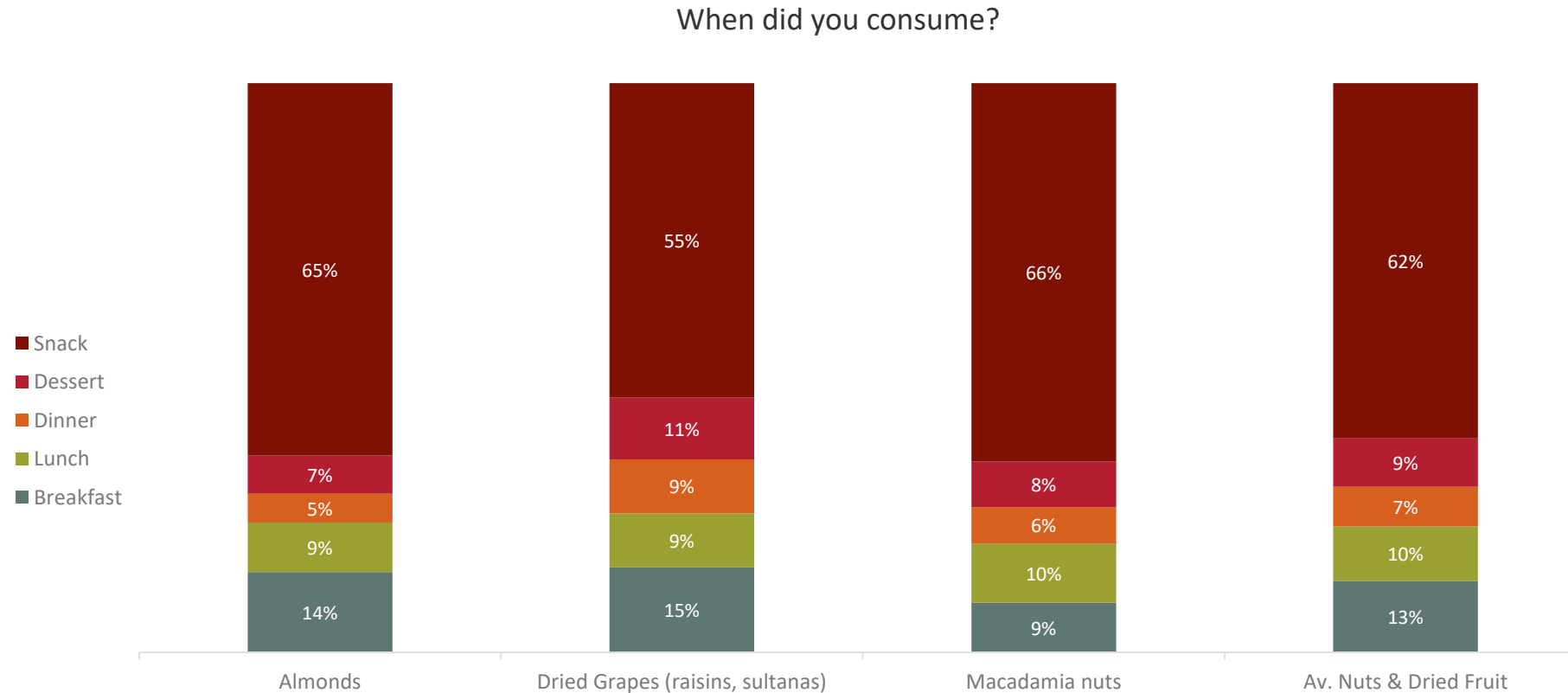


Most fruit commodities are commonly eaten in Malaysia and are highly penetrated, especially apples & citrus. By contrast, half of the population never eat lychees

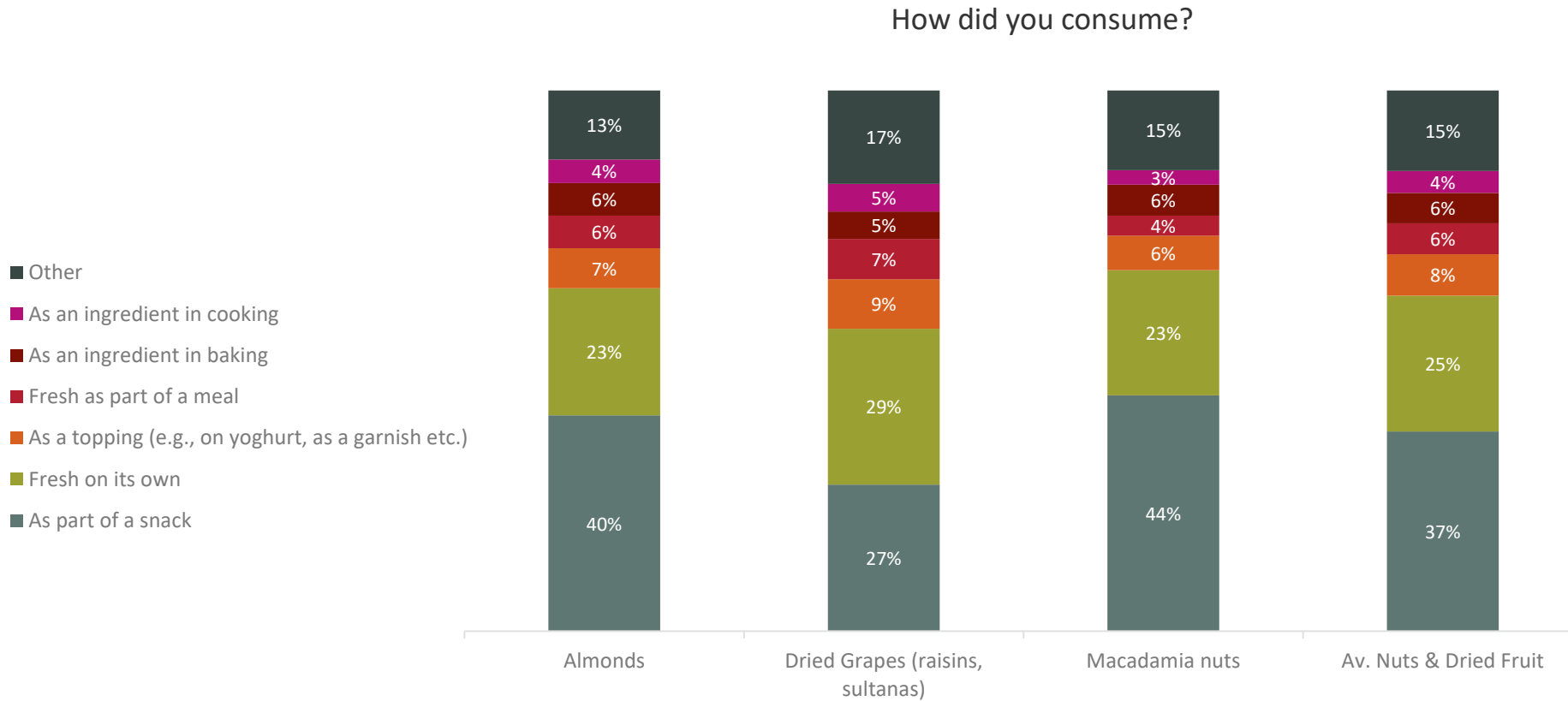
How often do you consume each commodity?



Nuts are predominantly snack foods, especially macadamias; by contrast dried grapes have a strong breakfast-time skew



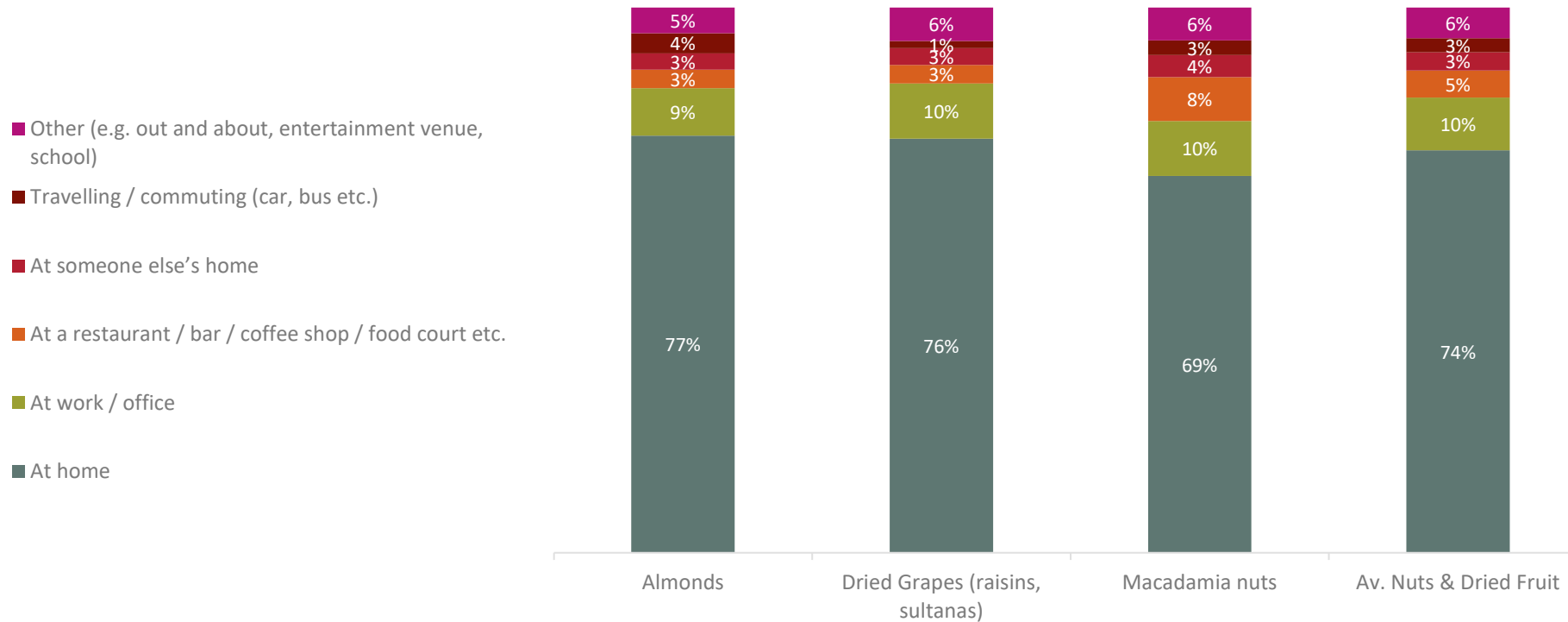
Compared to fruits, nuts & dried fruits are consumed in a greater variety of formats and are more likely to be ‘as part of a snack’



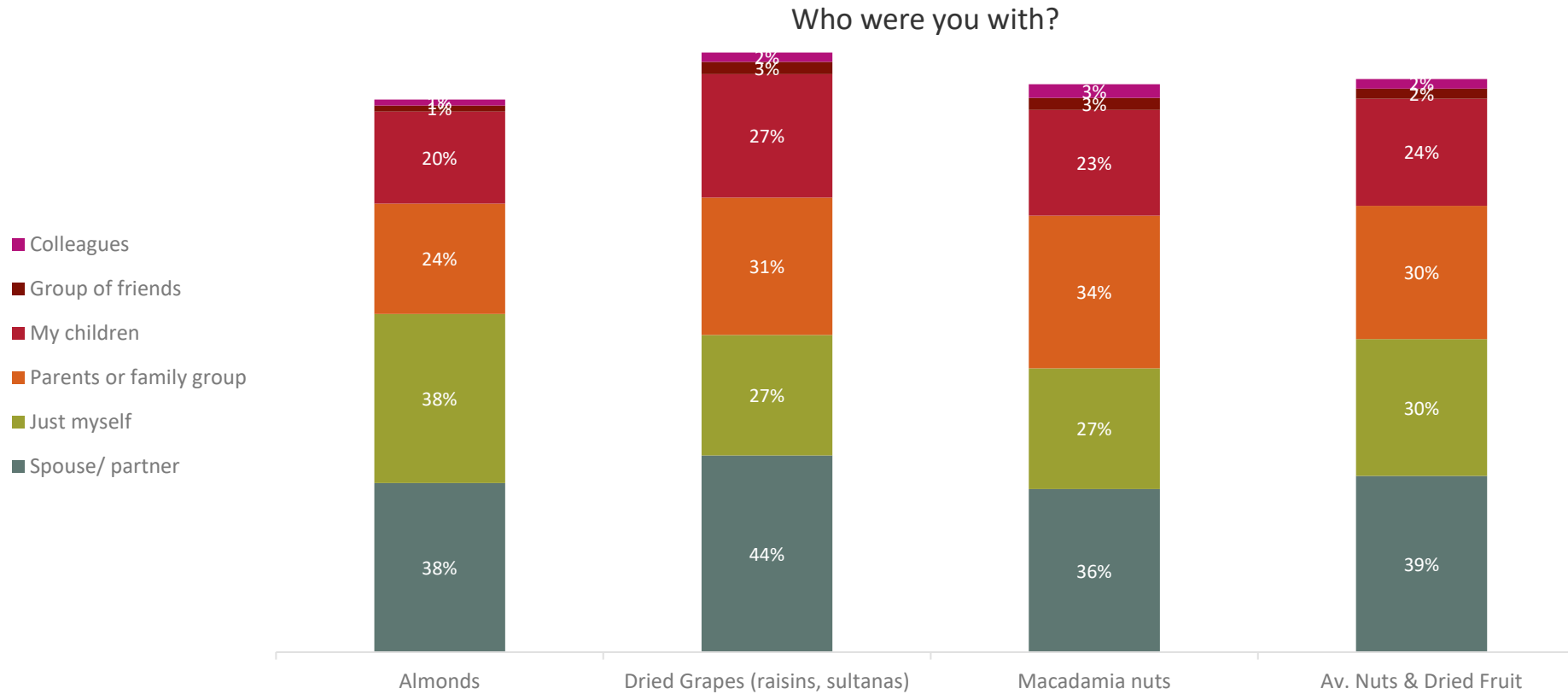


Around three quarters of consumption of nuts and dried fruits is in the home

Where did you consume?



In Malaysia, people consume nuts and dried grapes with family: spouse / partner or parents or family group or their children; or alone



The 6 vegetable groups of interest

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.

They are widely consumed with savoury foods and the substitute set is vegetables, hence they are included here.



Avocado



Olives/Olive Oil



Onion



Potatoes



Sweet Potato

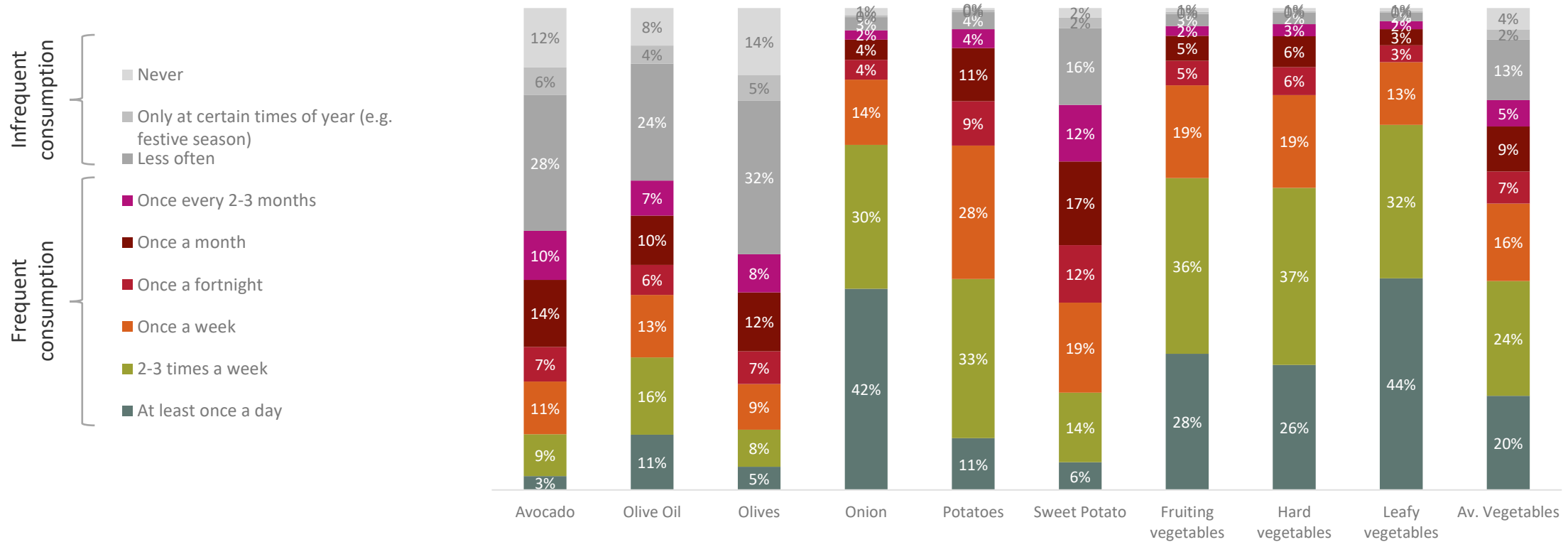


Hard Veg,
Fruiting Veg & Leafy Veg



Fruiting, hard and leafy vegetables, onions and potatoes are common in Malaysia and highly penetrated. By contrast, a high proportion of people never eat avocados and olives

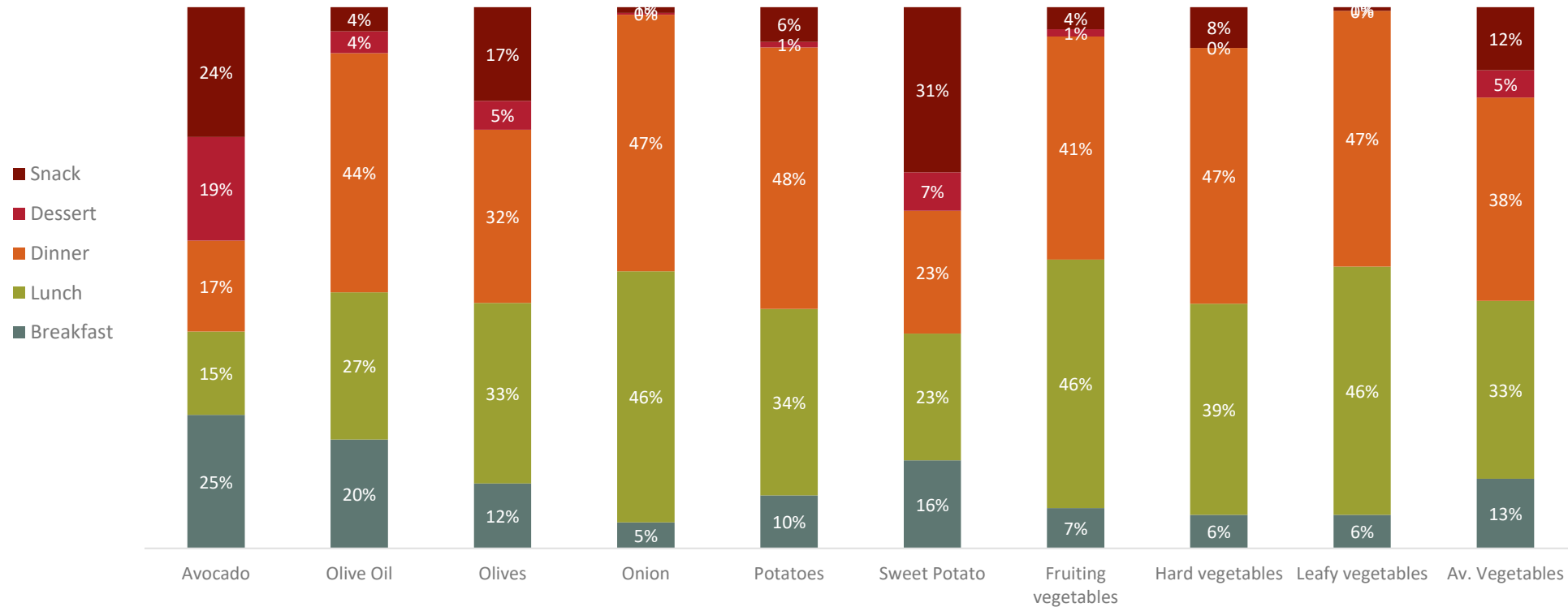
How often do you consume each commodity?





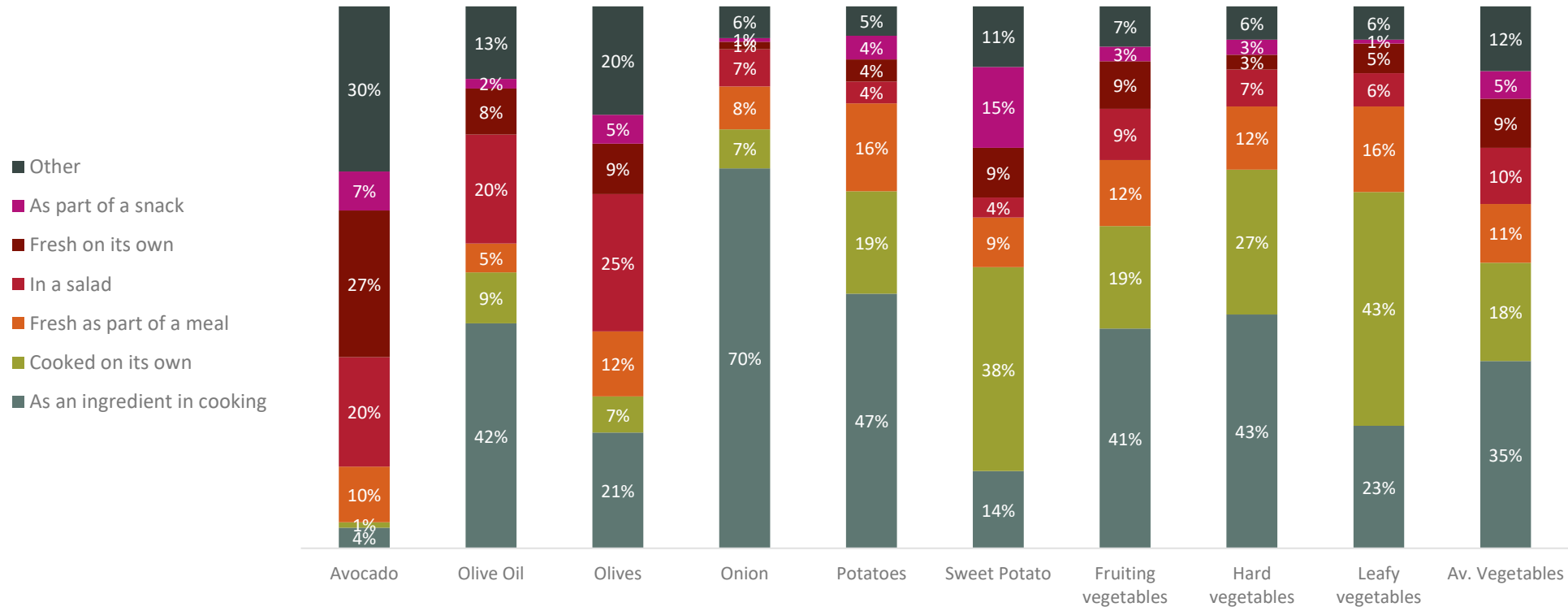
Most vegetables are consumed at meals, mainly at lunch or dinner. Sweet potato or avocado are consumed as snacks

When did you consume?



Different vegetables are used in different ways, for example olive oil, onions, potatoes, fruiting and hard vegetables are used as ingredients, avocado on its own

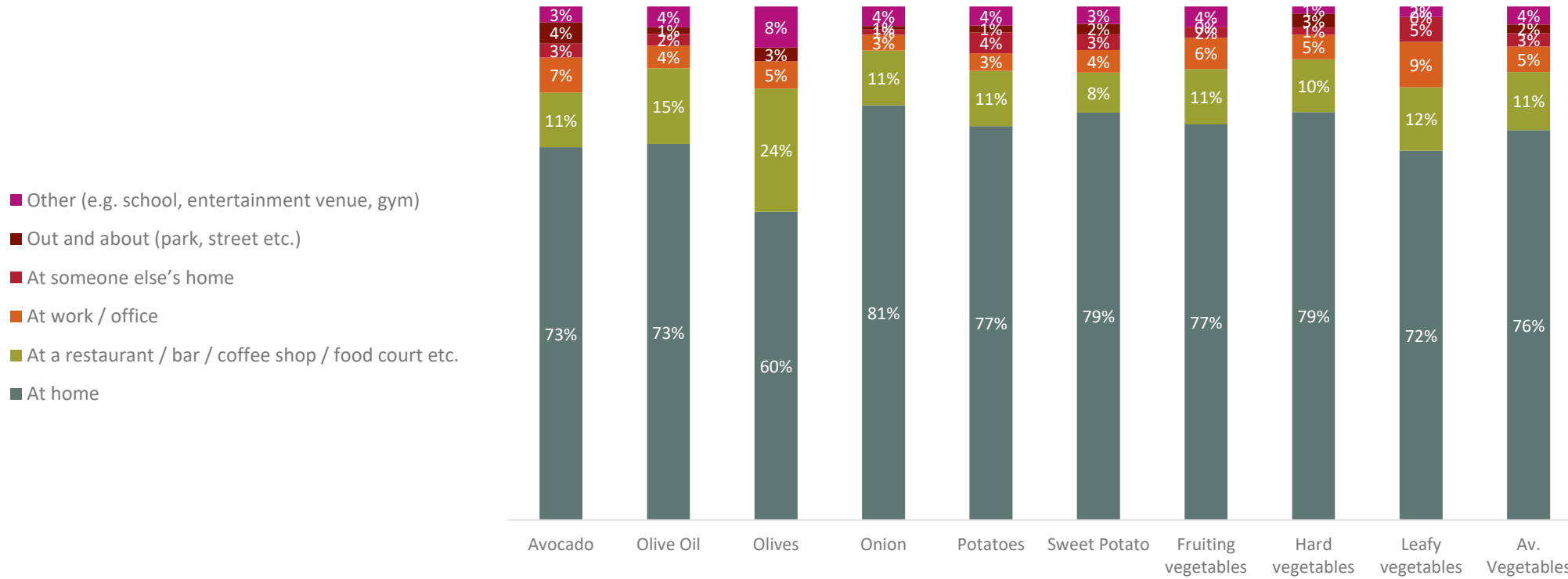
How did you consume?





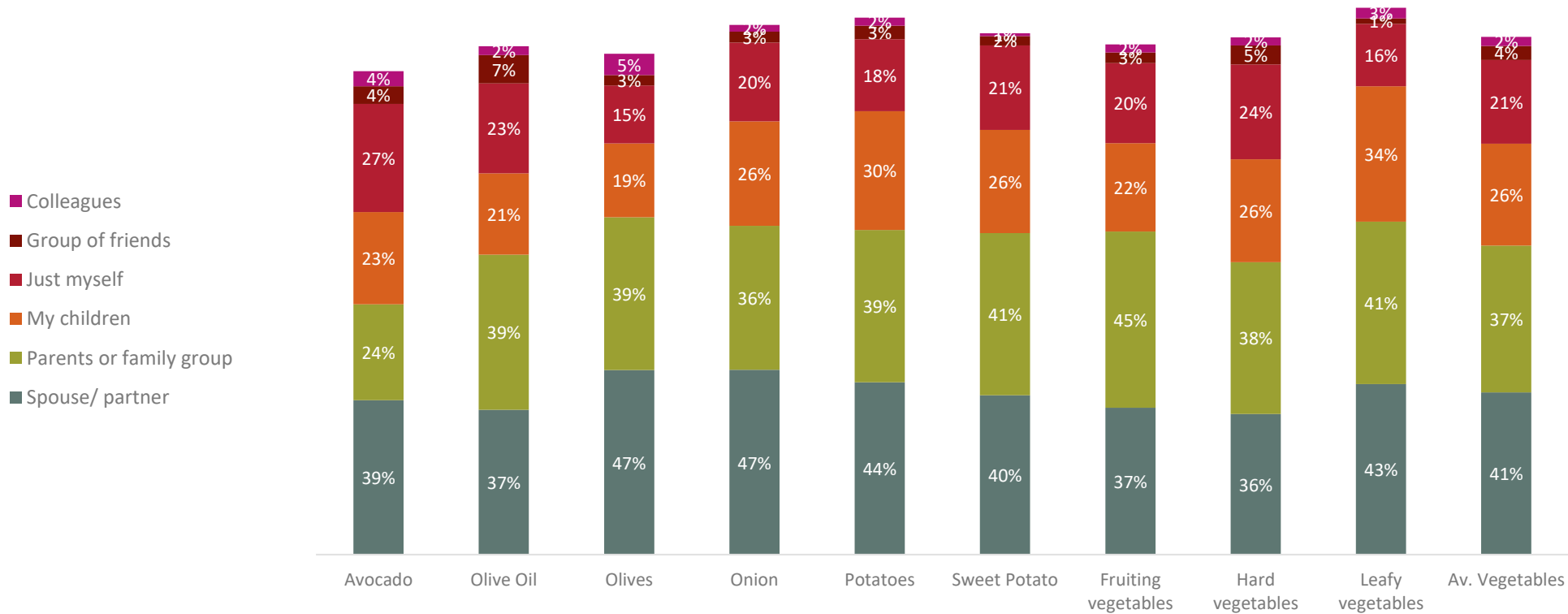
The average vegetable is consumed mainly in home

Where did you consume?



Vegetables are consumed with family, spouse / partner, parents or family group or children

Who were you with?





5. Commodity prioritisation

Leverage the strategic framework to prioritize commodities based on consumer behaviour and perception.



The strategic objective:

To determine – from a consumer perspective only – which commodities 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 Australian export commodities for Malaysian consumers and **there are two key axis on which we will evaluate each commodity to determine the priorities.**



How attractive is the consumer opportunity for a commodity?

+



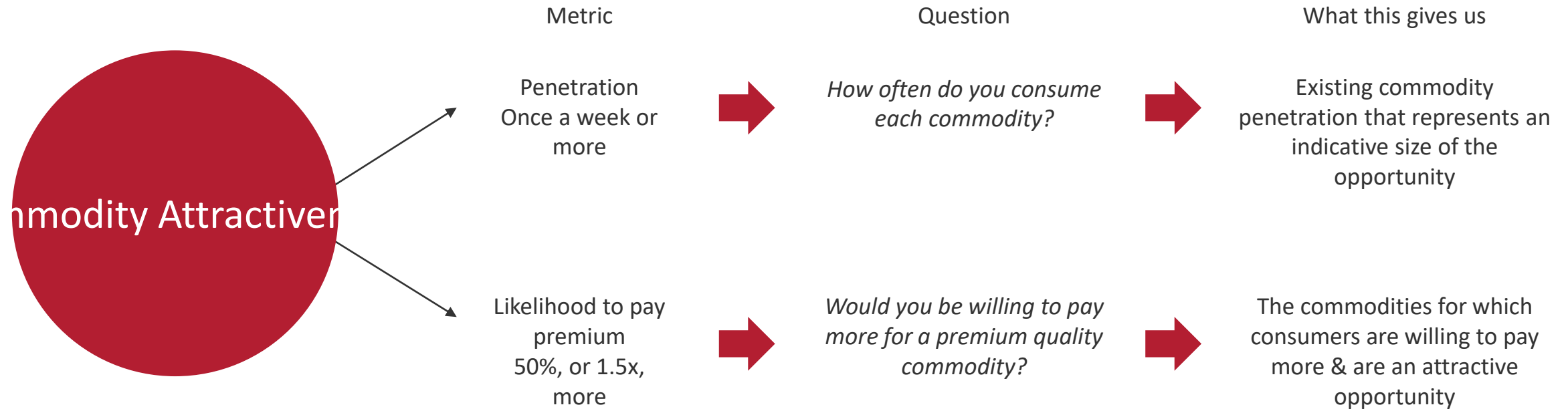
How appealing is Australian or premium produce?



Commodity Attractiveness and Australian Appeal are each determined by two factors. Each factor carries a different weight reflecting their relative importance



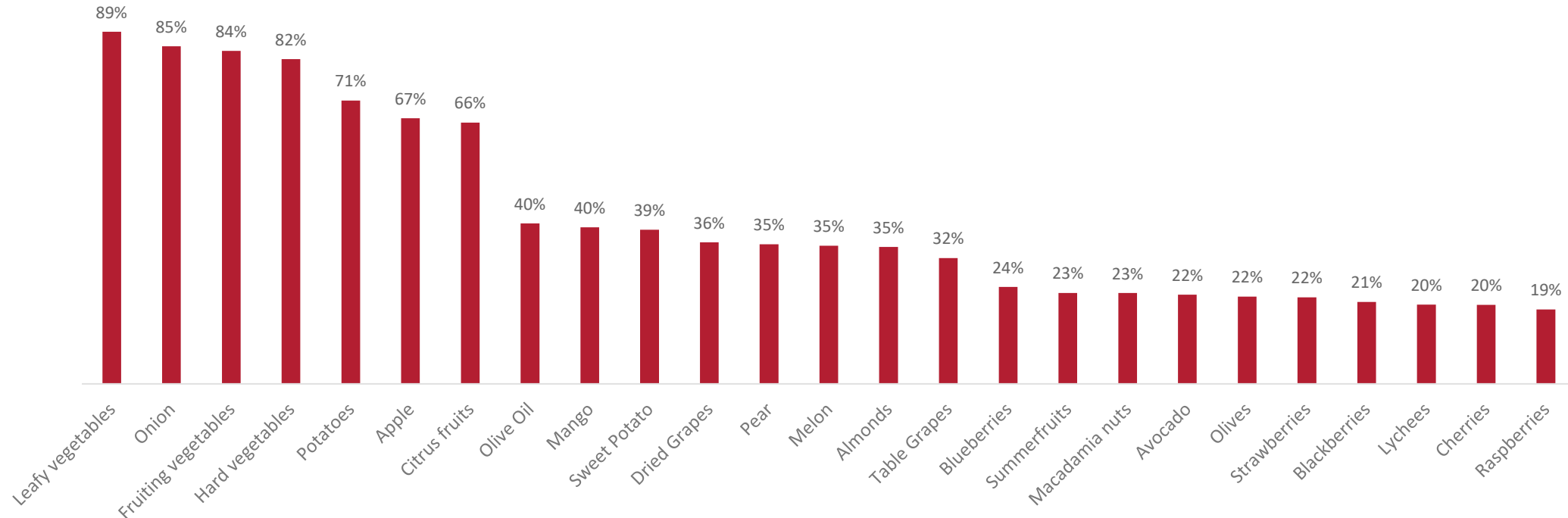
Commodity Attractiveness determines the size of the potential opportunity for a particular commodity



Vegetables, including onions are the most highly penetrated commodities, followed by potatoes, apples & citrus. Other items such as olive oil, mango, sweet potato and dried grapes are also regularly consumed

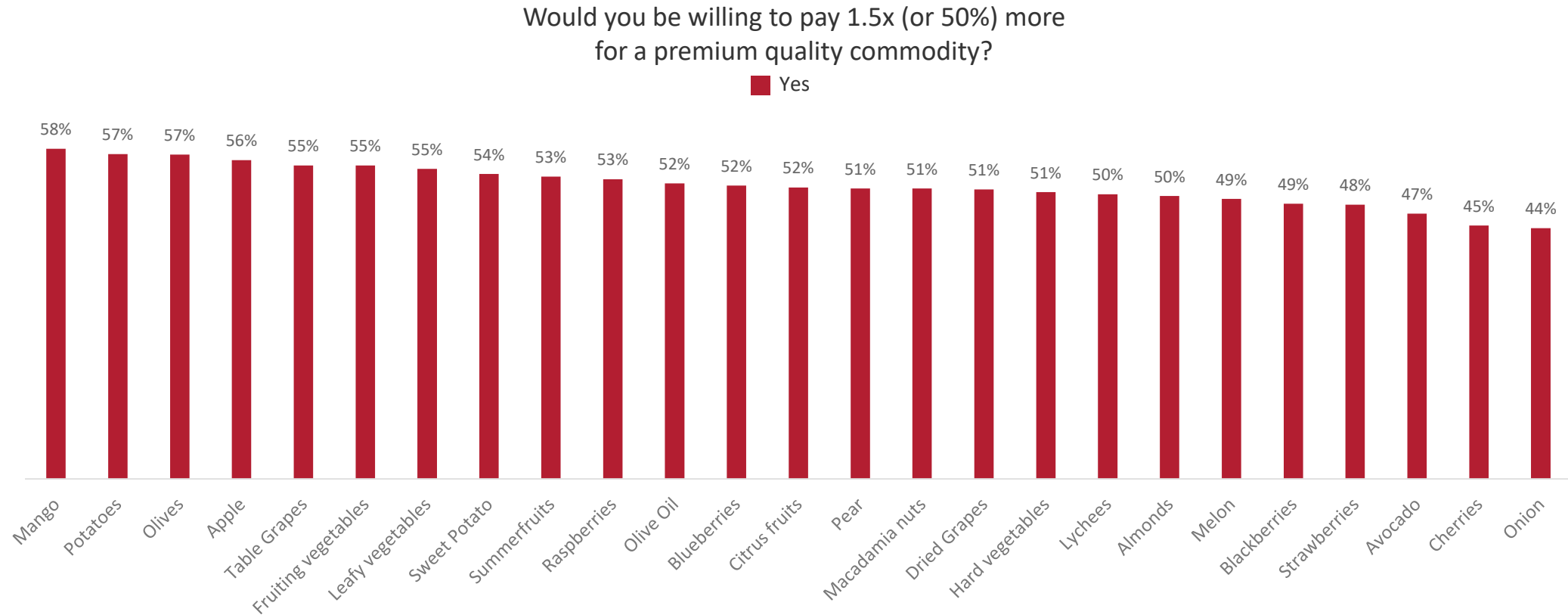
How often do you consume each commodity?

■ Consumed at least once a week

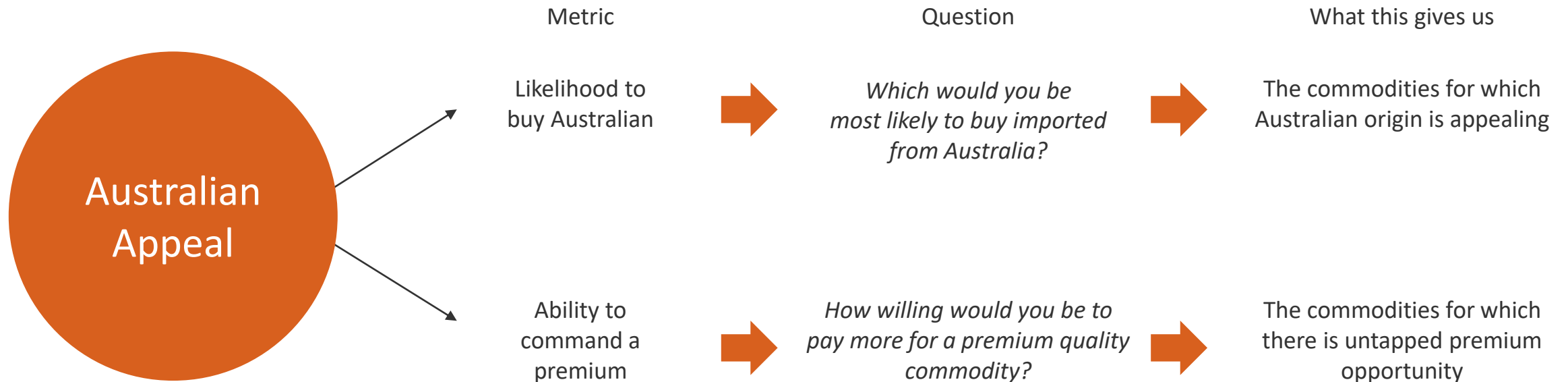




In Malaysia there is a willingness to pay a premium for quality across all commodities

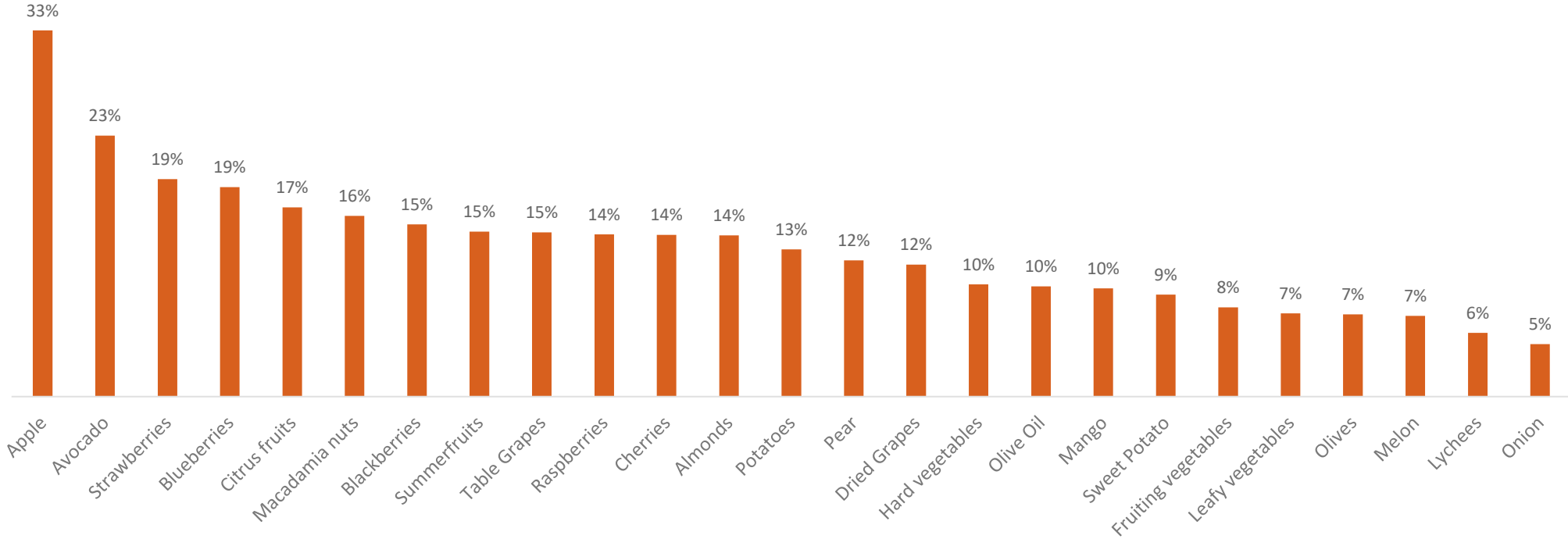


Australian Appeal provides an indication of the potential to realise the export opportunity based on how likely consumers are to purchase Australian or pay a premium for quality

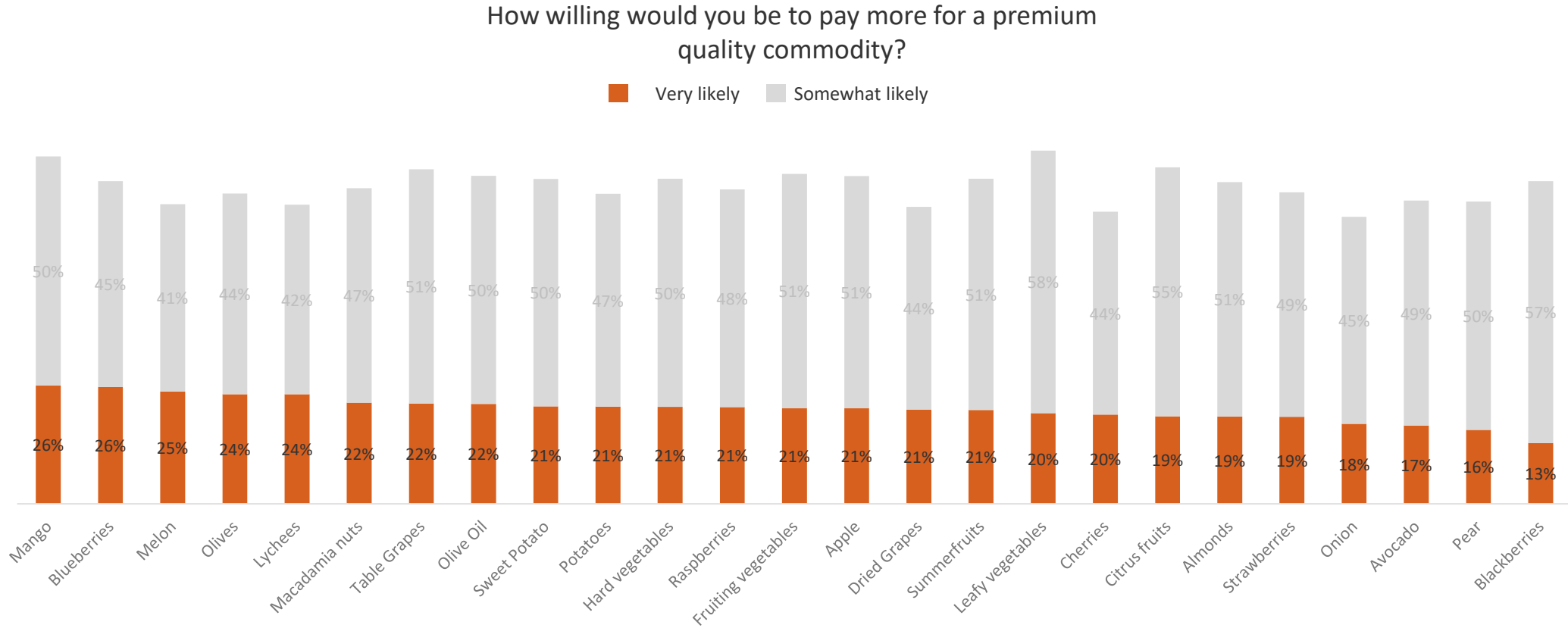


Apples and avocados followed by strawberries and blueberries are most appealing from Australia in Malaysia

Which of the following would you be most likely to buy imported from Australia?



Similarly, most consumers in Malaysia are at least somewhat likely to pay a premium for the full range of fruits and vegetables



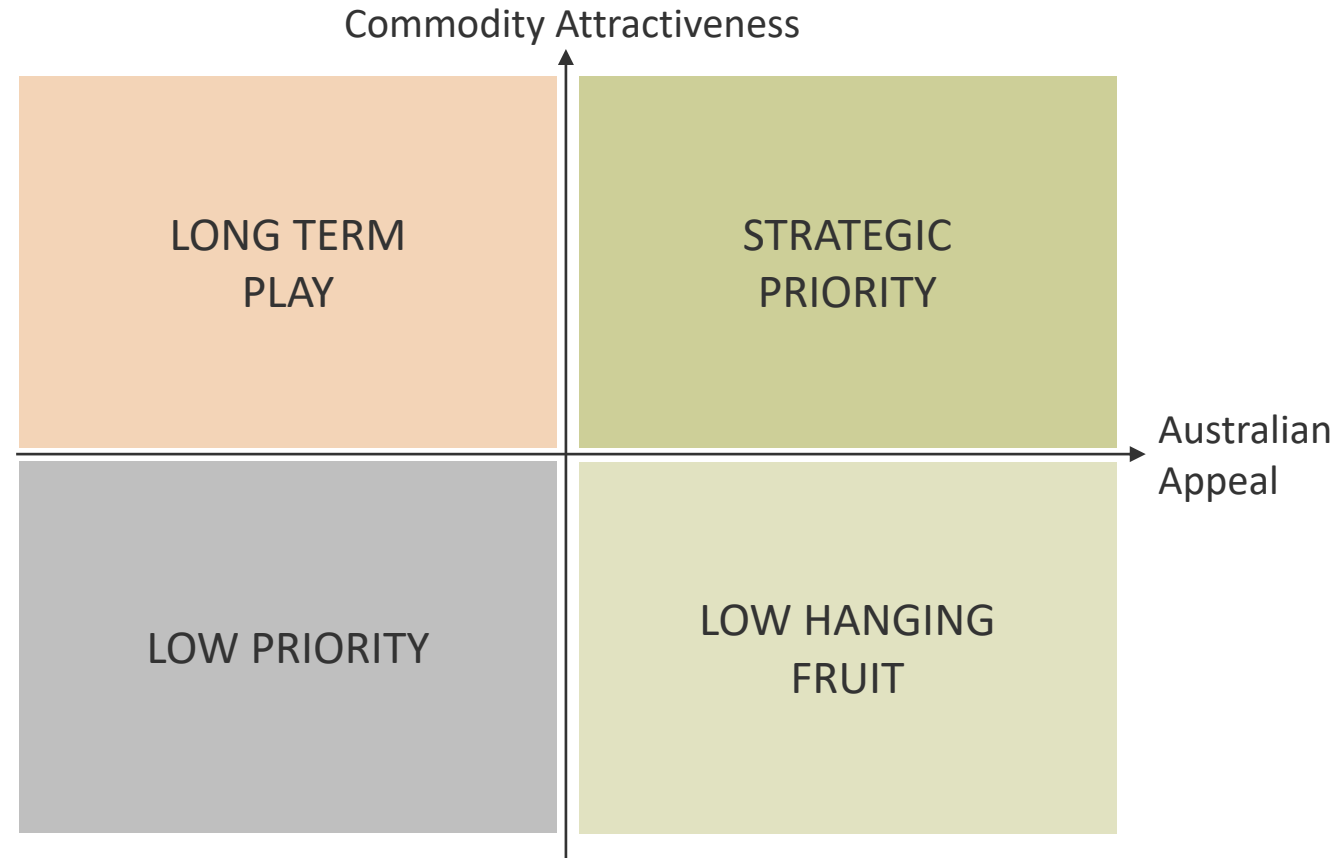


We bring this data together into a
prioritisation matrix

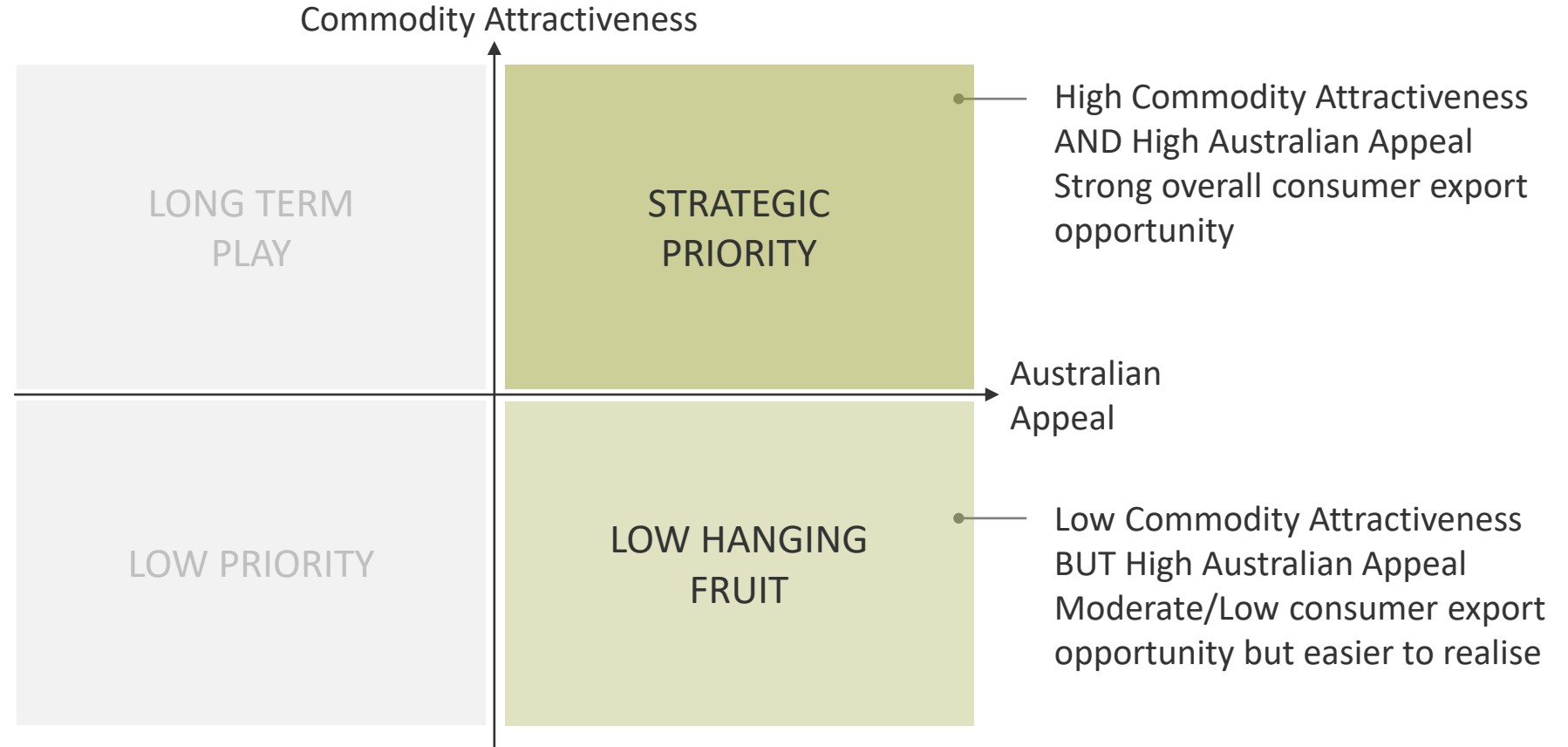
The matrix will enable us to
determine which commodities
represent a strong consumer
opportunity for Australian export



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

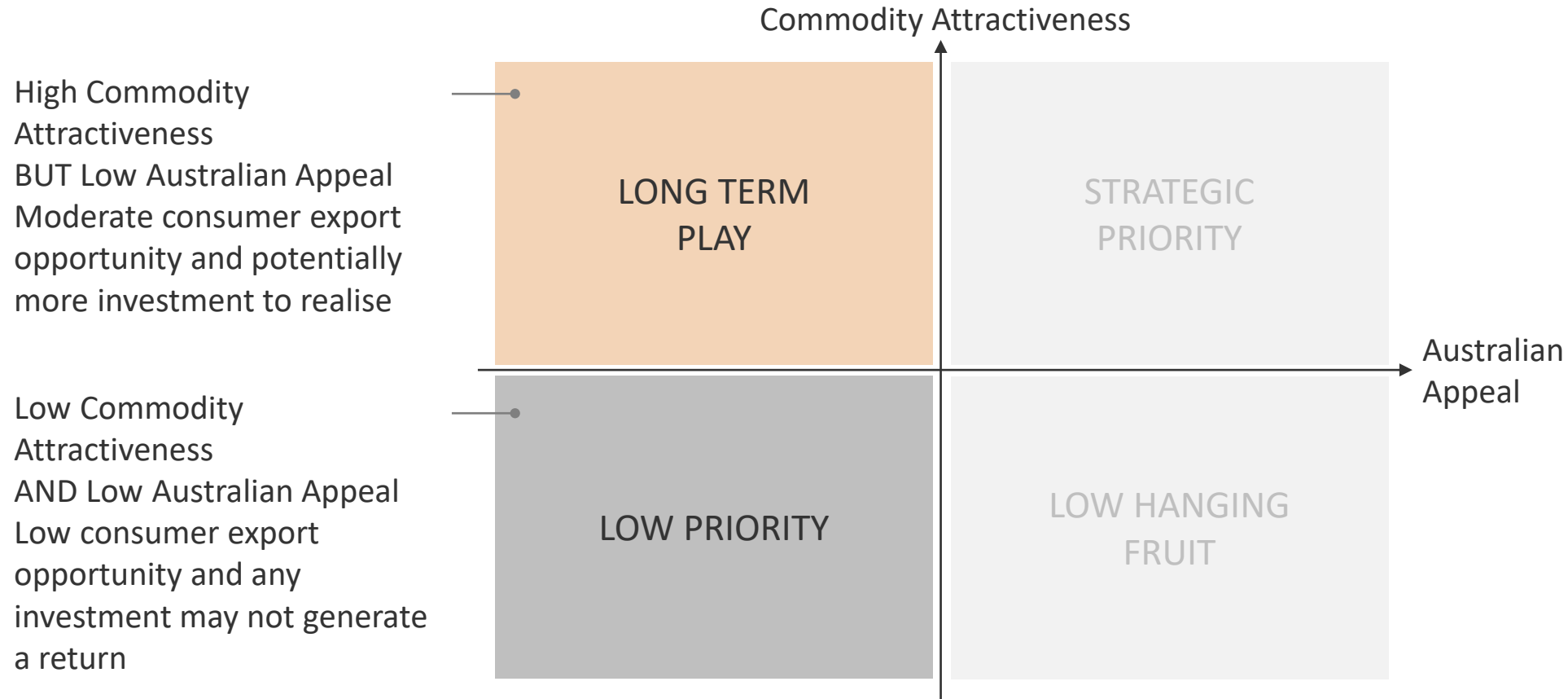


Commodities on the right-hand side of the matrix represent more attractive consumer opportunities for export and investment is more likely to generate a return



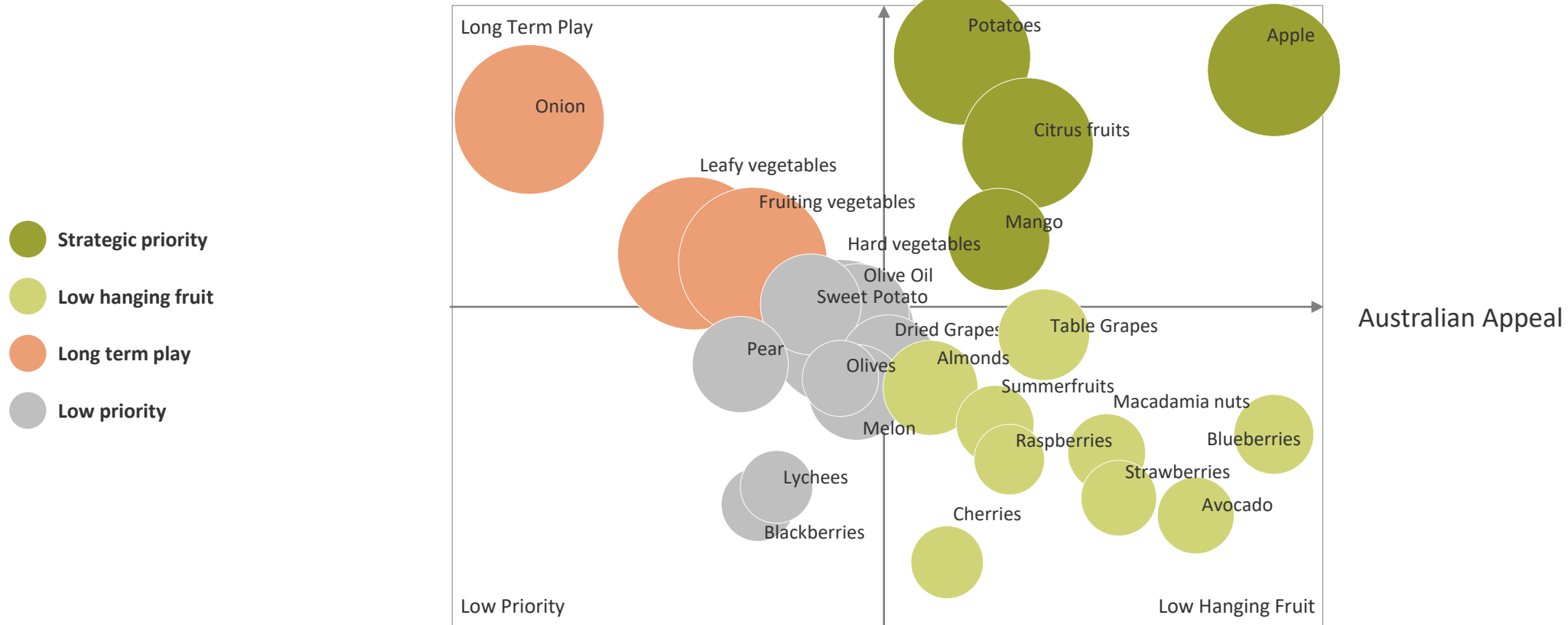


By contrast, commodities on the left-hand side of the matrix may require more investment with a longer term pay-off or minimal to no returns



We have identified X strategic priority commodities that represent the most attractive and appealing export opportunity, based on consumer preference and behaviour

Commodity Attractiveness



Malaysia: Summary of Strategic Priorities



Apples



Citrus Fruits



Potatoes



Mango

STRATEGIC IMPLICATIONS

Apples are the most attractive and addressable opportunity for Australian export, this is driven primarily by high penetration and Australian appeal that's significantly high vs. all other commodities

Like Apples, Citrus Fruits are widely consumed in Malaysia and there's a high willingness to pay for premium indicating this could be a strong opportunity for export

Potatoes also have high penetration so are an appealing opportunity for export. However, addressability remains a challenge to overcome given moderate Australian appeal and limited premium opportunity

By contrast, Mangoes represent a strong opportunity for premium export from Australian. They're ranked #1 on both premium metrics and, despite lower penetration, there's moderate Australian appeal that can be leveraged

ATTRACTIVENESS

- Highest penetration rate of all fruit (2 in 3 consume apples weekly)
- High willingness to pay 1.5x more for premium quality

- Citrus fruits are the next most widely consumed fruits, two thirds of all consumers also have them weekly
- More moderate (but still strong) willingness to pay 1.5x more for premium quality

- Potatoes have strong penetration
- High willingness to pay 1.5x more for premium quality

- Lower penetration vs. other priority commodities, but still 40% of consumers have them weekly
- High willingness to pay 1.5x more for premium quality (#1 ranking commodity)

ADDRESSABILITY

- Very strong Australian association (#1 ranking commodity and 10% higher likelihood to purchase Australian vs. Avocados, the #2 ranking commodity)
- Moderate willingness to pay for premium quality

- High Australian appeal
- Moderate willingness to pay for premium quality

- Moderate Australian appeal
- Moderate willingness to pay for premium quality

- Moderate Australian appeal
- #1 ranking commodity for willingness to pay for premium quality



6. Appendix A

The following groups of fruits, vegetables and nuts are included in the study

Fruits



Apple & Pear



Blueberries



Cherry



Citrus
(e.g. orange, lemon,
lime, grapefruit)



Lychees



Mango



Melons



Raspberries
& Blackberries



Strawberries



Summer fruit
(e.g. apricots, nectarines,
peaches, plums)



Table Grapes

Nuts & dried fruits



Almond



Macadamia



Dried Grapes
(e.g. raisins, sultanas)

Vegetables



Potatoes



Sweet Potato



Avocado



Olives/Olive Oil



Onion



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)

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