



# CUCUMBER COMPREHENSIVE REVIEW



52 weeks to 28.12.2019 vs Prior Year

## What is Homescan?

Nielsen Homescan® is a continuous panel of 10,000 households who record all take-home packed and fresh grocery from all retail outlets. The sample is demographically and geographically representative of the Australian household population.

Each household is equipped with a small handheld terminal through which details of all purchasing are entered - product, quantity, price and outlet. This information, along with the date of purchase, is linked with demographic details of the household and the household purchasing history. Data are projected for the population as a whole.

Estimates produced from Nielsen Homescan® are subject to sampling variation which means that every number reported has a standard error associated with it. For example at a Total National level, a 40% share of trade number, will be subject to a 1% standard error at a 95% confidence interval. This implies there is a 95% chance that the true value of the estimate lies between 39 to 41%.

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## Funding Statement

This project has been funded by Hort Innovation, using the vegetable, onion and sweet potato research and development levies, and contributions from the Australian Government. Hort Innovation is the grower-owned, not-for-profit research and development corporation for Australian horticulture.

# SUMMARY

- Cucumber grew at a faster rate in both dollar (7.8%) and volume (12.0%) sales compared to the average across all vegetables which saw dollar sales growth (5.9%) and flat volume sales (1.4%)
  - Cucumber growth driven by overall lower average prices, increased frequency & average weight purchased in the latest 52 weeks
- Major supermarkets\* account for the majority of dollar (77.2%) and volume sales (64.4%)
  - Other supermarkets\*, greengrocer and markets gained volume share of trade over major supermarkets
- In major supermarkets, loose cucumber accounts for almost two-thirds of all cucumber volume sales
  - Baby/Mini cucumber saw the highest dollar sales growth (48.7%) however, only accounts for a small portion (9%) of all cucumber volume sales in major supermarkets
- Keeping specific varieties of cucumber available in stores is crucial for continual growth
  - Four in ten respondents claimed they would not buy any cucumber if the type they want is not available

\*Major supermarkets comprise of Woolworths, Coles & Aldi \*Other supermarkets comprise of all other full service supermarkets not including Woolworths, Coles & Aldi

\*Other cucumber consists of all other prepack cucumbers \*Telegraph cucumber included as prepack in other cucumbers



# CUCUMBER

This artwork was created using Nielsen data.

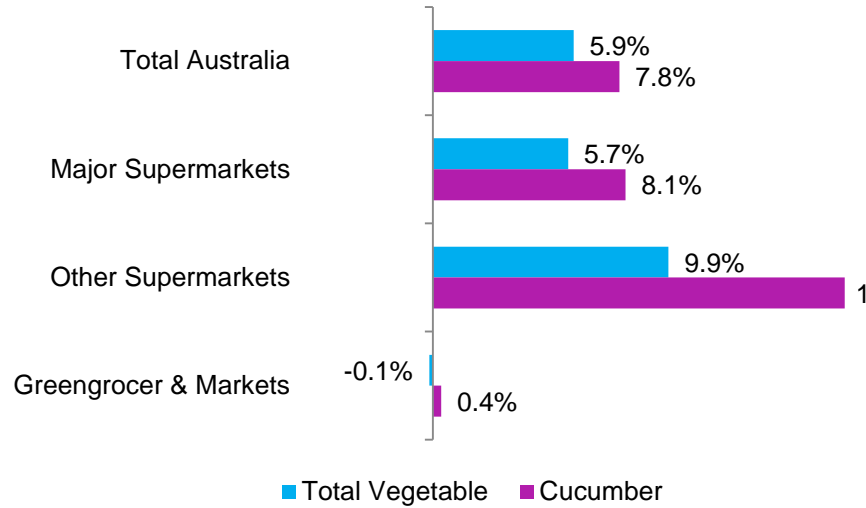
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# CUCUMBER GREW AT A FASTER RATE COMPARED TO THE AVERAGE ACROSS ALL VEGETABLES IN BOTH DOLLAR AND VOLUME SALES

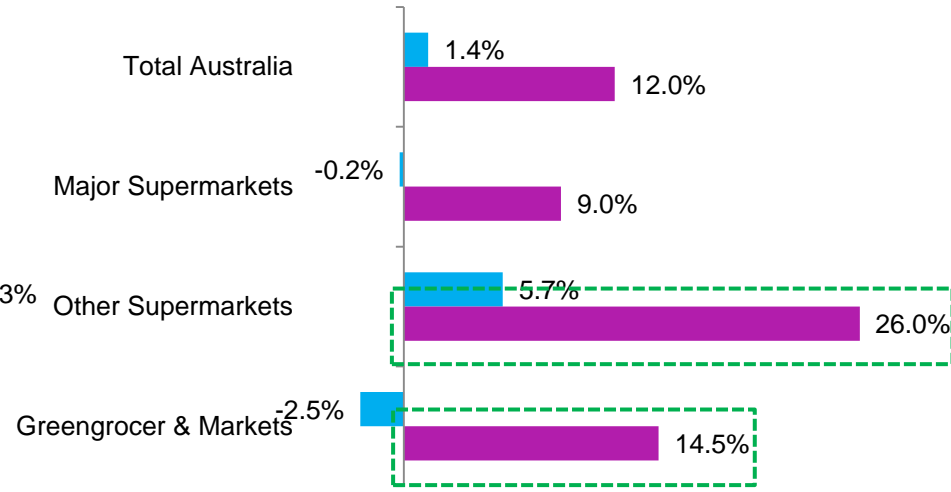
In terms of volume sales, other supermarkets, greengrocer & markets grew faster than total Australia

Total Vegetable & Cucumber | Dollar and Volume Sales Change | 52 weeks to 28/12/2019 vs Prior Year

Dollar Sales Change vs Prior Year



Volume Sales Change vs Prior Year



\*Major supermarkets comprise of Woolworths, Coles & Aldi

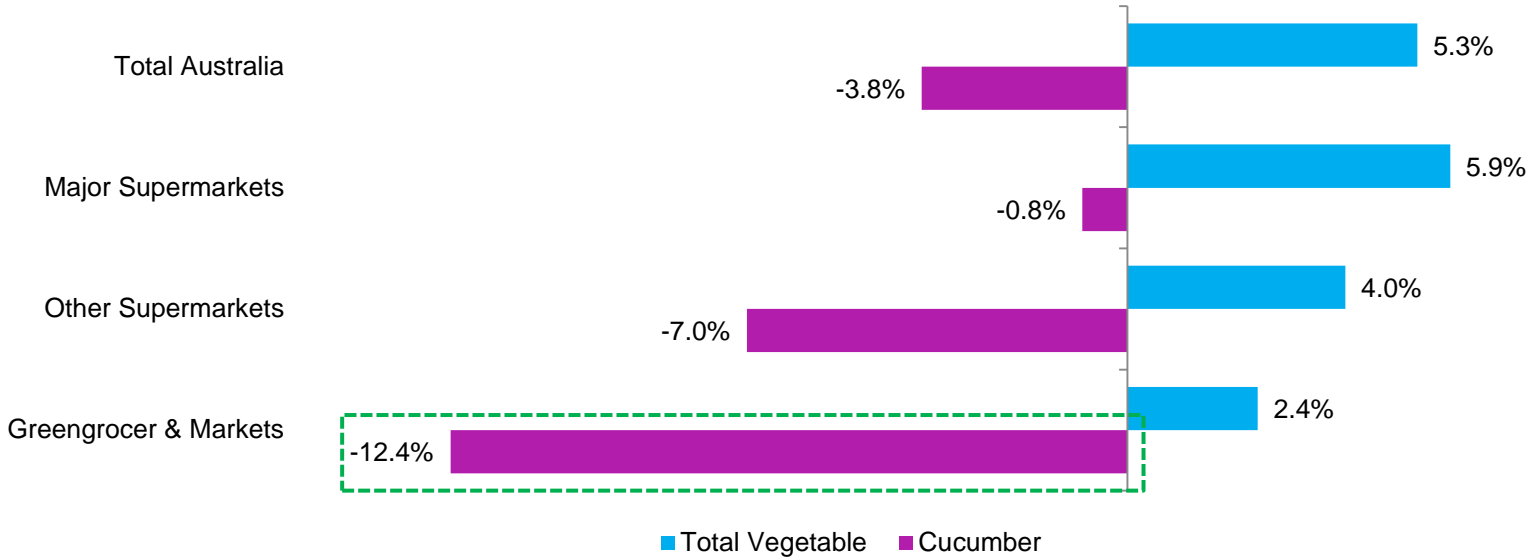
\*Other supermarkets comprise of all other full service supermarkets not including Woolworths, Coles & Aldi

Source: Nielsen Homescan

# CUCUMBER SAW A LOWER AVERAGE PRICE CHANGE COMPARED TO THE AVERAGE ACROSS ALL VEGETABLES

Greengrocer & markets saw the highest decline in average price change with -12.4%

Total Vegetable & Cucumber | Average Price Change | 52 weeks to 28/12/2019 vs Prior Year



\*Major supermarkets comprise of Woolworths, Coles & Aldi

\*Other supermarkets comprise of all other full service supermarkets not including Woolworths, Coles & Aldi

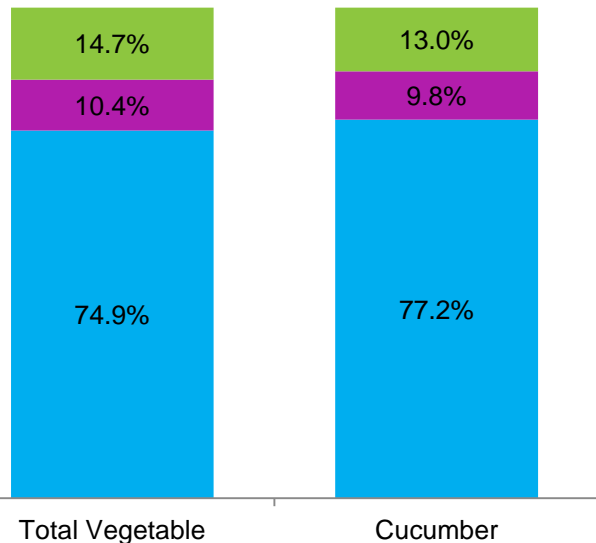
Source: Nielsen Homescan

# MAJOR SUPERMARKETS ACCOUNT FOR THREE QUARTERS OF ALL CUCUMBER DOLLAR SALES

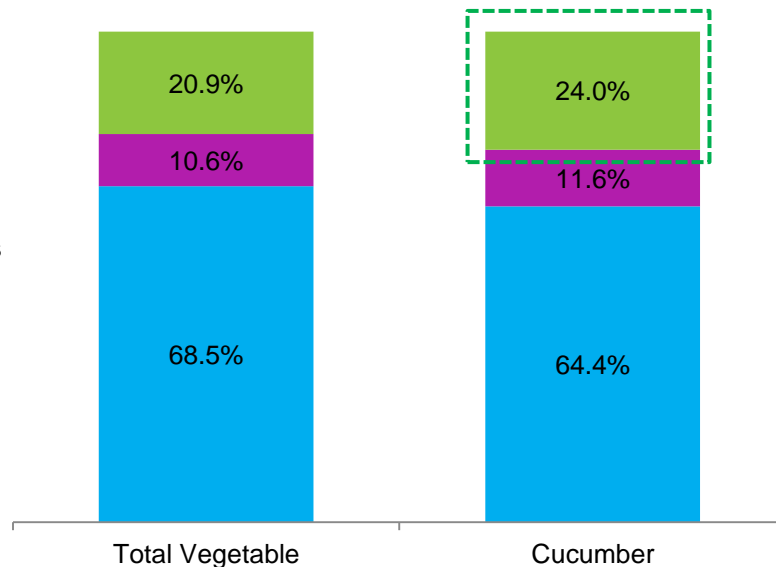
Greengrocer & markets saw a higher volume share for cucumber volume sales compared to the average across all vegetables and are gaining volume share of trade

Total Vegetable & Cucumber | Retailer Dollar and Volume Share of Trade | 52 weeks to 28/12/2019

## Retailer Dollar Share of Trade



## Retailer Volume Share of Trade



\*Major supermarkets comprise of Woolworths, Coles & Aldi

\*Other supermarkets comprise of all other full service supermarkets not including Woolworths, Coles & Aldi

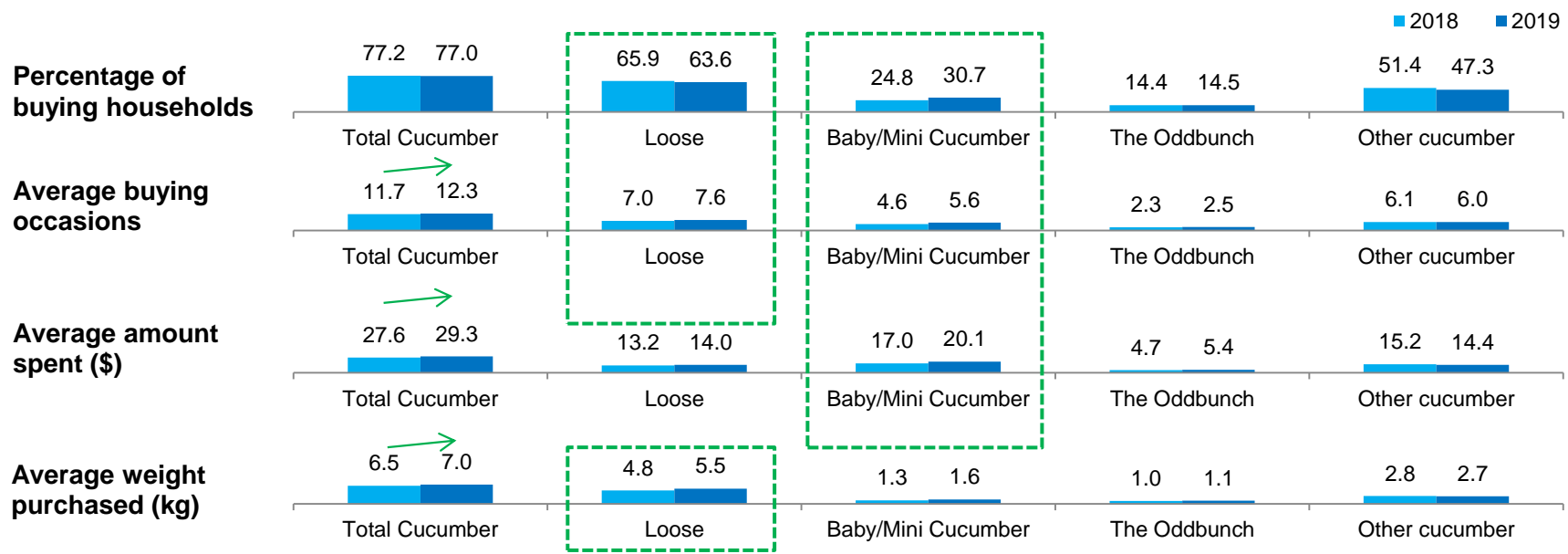
Source: Nielsen Homescan

# IN MAJOR SUPERMARKETS, LOOSE CUCUMBERS HAD THE HIGHEST NUMBER OF BUYING HOUSEHOLDS, AVERAGE BUYING OCCASIONS AND AVERAGE WEIGHT PURCHASED (KG)

Baby/mini cucumber saw the highest increase in buying households, frequency and average amount spent (\$) in the latest 52 weeks

Cucumbers | Key Performance Indicators in Major Supermarkets | 52 weeks to 28/12/2019 vs Prior Year

\*Telegraph cucumber included as prepack in other cucumbers



Source: Nielsen Homescan | \*Major supermarkets comprise of Woolworths, Coles & Aldi, \*Other cucumber consists of all other prepack cucumbers  
 \*The Oddbunch limited to Major Supermarkets only



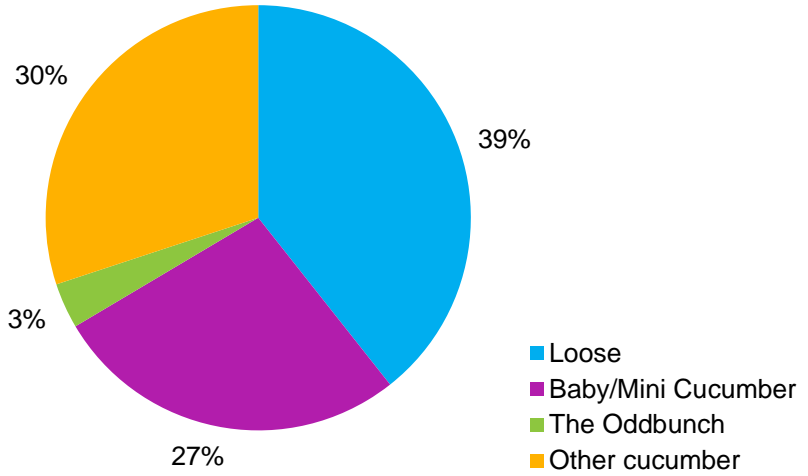
# IN MAJOR SUPERMARKETS, LOOSE CUCUMBER ACCOUNTS FOR OVER A THIRD OF ALL CUCUMBER DOLLAR SALES

Baby/Mini cucumbers saw the highest dollar sales growth with 48.7% and are rapidly gaining dollar share over other cucumbers\*

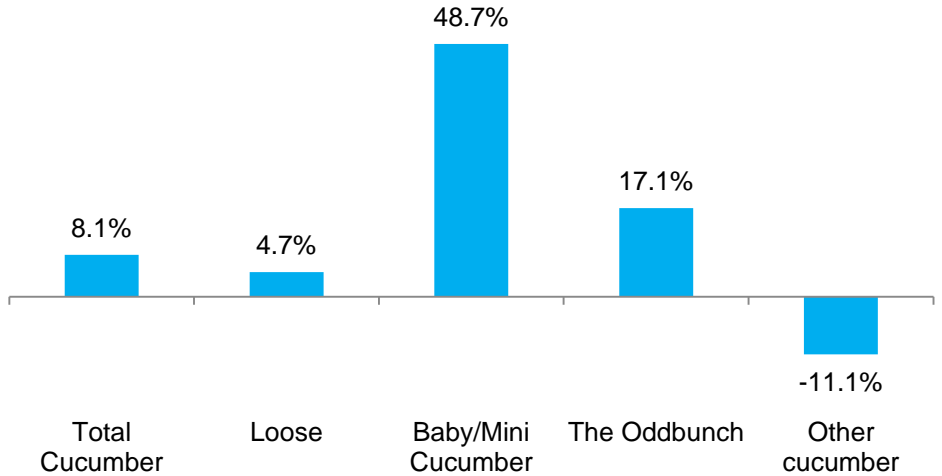
Cucumbers | Dollar Sales Share and Change | Major Supermarkets | 52 weeks to 28/12/2019 vs Prior Year

\*Telegraph cucumber included as prepack in other cucumbers

Dollar Sales Share



Dollar Sales Change



Source: Nielsen Homescan | \*Major supermarkets comprise of Woolworths, Coles & Aldi, \*Other cucumber consists of all other prepack cucumbers  
 \*The Oddbunch limited to Major Supermarkets only

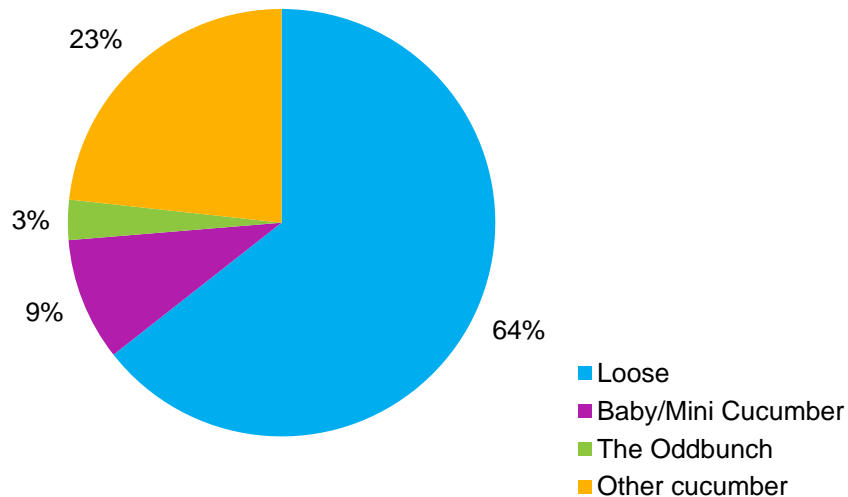
# IN MAJOR SUPERMARKETS, LOOSE CUCUMBER ACCOUNTS FOR ALMOST TWO-THIRD OF ALL CUCUMBER VOLUME SALES

In major supermarkets, loose cucumber volume sales is growing at a quicker rate compared to total cucumber & gaining volume sales share over other cucumbers\*

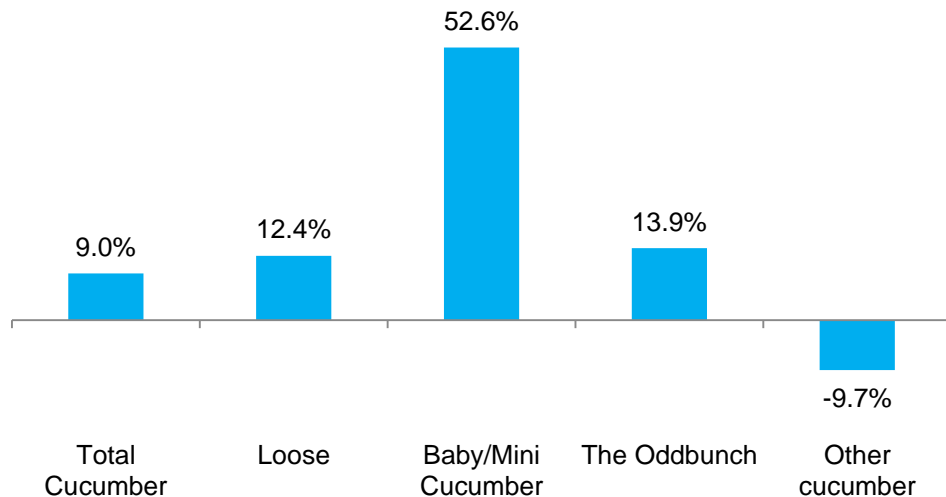
Cucumbers | Volume Sales Share and Change | Major Supermarkets | 52 weeks to 28/12/2019 vs Prior Year

\*Telegraph cucumber included as prepack in other cucumbers

Volume Sales Share



Volume Sales Change



Source: Nielsen Homescan | \*Major supermarkets comprise of Woolworths, Coles & Aldi, \*Other cucumber consists of all other prepack cucumbers

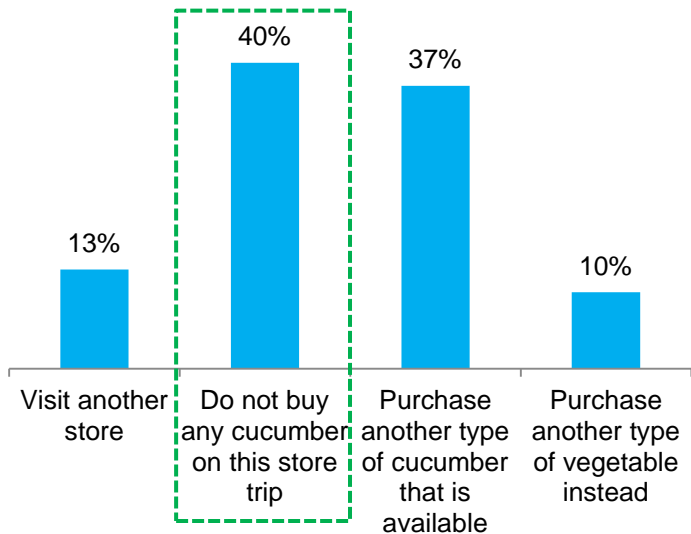
\*The Oddbunch limited to Major Supermarkets only

# KEEPING SPECIFIC VARIETIES OF CUCUMBER AVAILABLE IN STORES IS CRUCIAL FOR CONTINUAL GROWTH

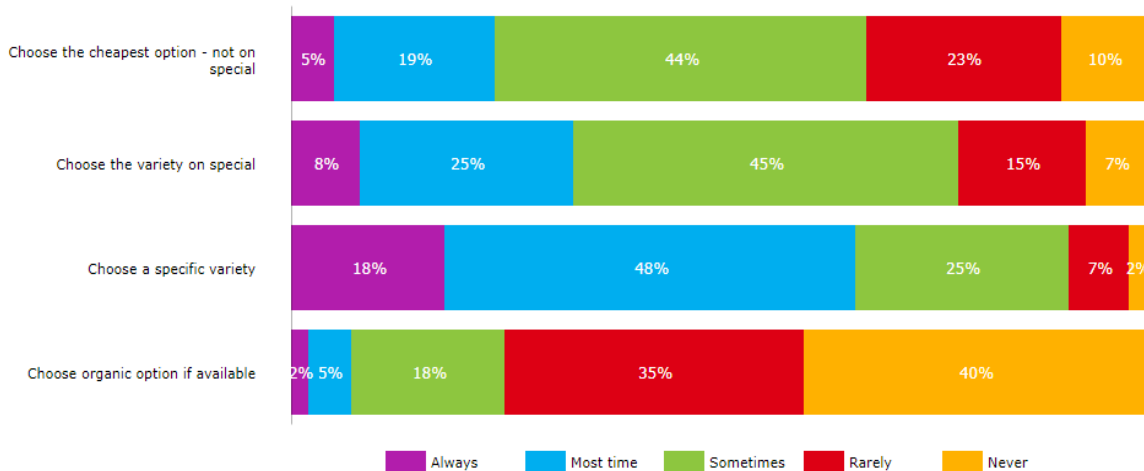
Four in ten respondents claimed they would not buy any cucumber on their store trip if the type they want is not available making it the second highest amongst its competitive set

## Cucumber | Attitudinal Data

Q16. If the types of Cucumber you usually buy are not available, what would you do (single choice)?



## FACTORS DRIVING PURCHASE DECISIONS



Q17. For each statement below, which one best describes you when buying Cucumber (single choice)?

Source: Attitudinal reports prepared by Nielsen for Hort Innovation, survey sample minimum n=300, fieldwork from 07/11/2019 to 12/11/2019 for the Australian market. Copyright © 2019 Horticulture Innovation Australia.

The image features the Nielsen logo centered on a vibrant blue background with a 3D, wavy, liquid-like texture. The word "nielsen" is written in a white, lowercase, serif font. Below the letters, there is a horizontal line of eight white dots, with the first dot positioned under the 'i' and the last dot under the 'n'.

nielsen

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