



Table Grapes – leading the way!

What does the future hold?

8th Australian Table Grape Conference
September 2011
Yahya Kanj



nielsen
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Table Grapes – “Leading the Way”



Bigger Picture Trends – What’s happening around us?

Grapes Performance

Future Implications

Bigger Picture Trends – What's happening around us?

Confusing Time For Consumers

POSITIVES	NEGATIVES
Strong \$A, Interest rates steady	Consumer Confidence falling
Low retail prices	Profit squeeze on suppliers
Employment strong	Saving more than ever before
Much more promotions	No increase in consumption
Big Brands becoming cheaper	Consumers more open to Private Label
Global retailers entering on Value	But consumers still don't have "choice"
Retailers actively leveraging shopper insights in Price War	Consumers really confused about what value is and who gives it to them

Source: Nielsen Global Economic Report, Retail Barometer, Homescan Panel

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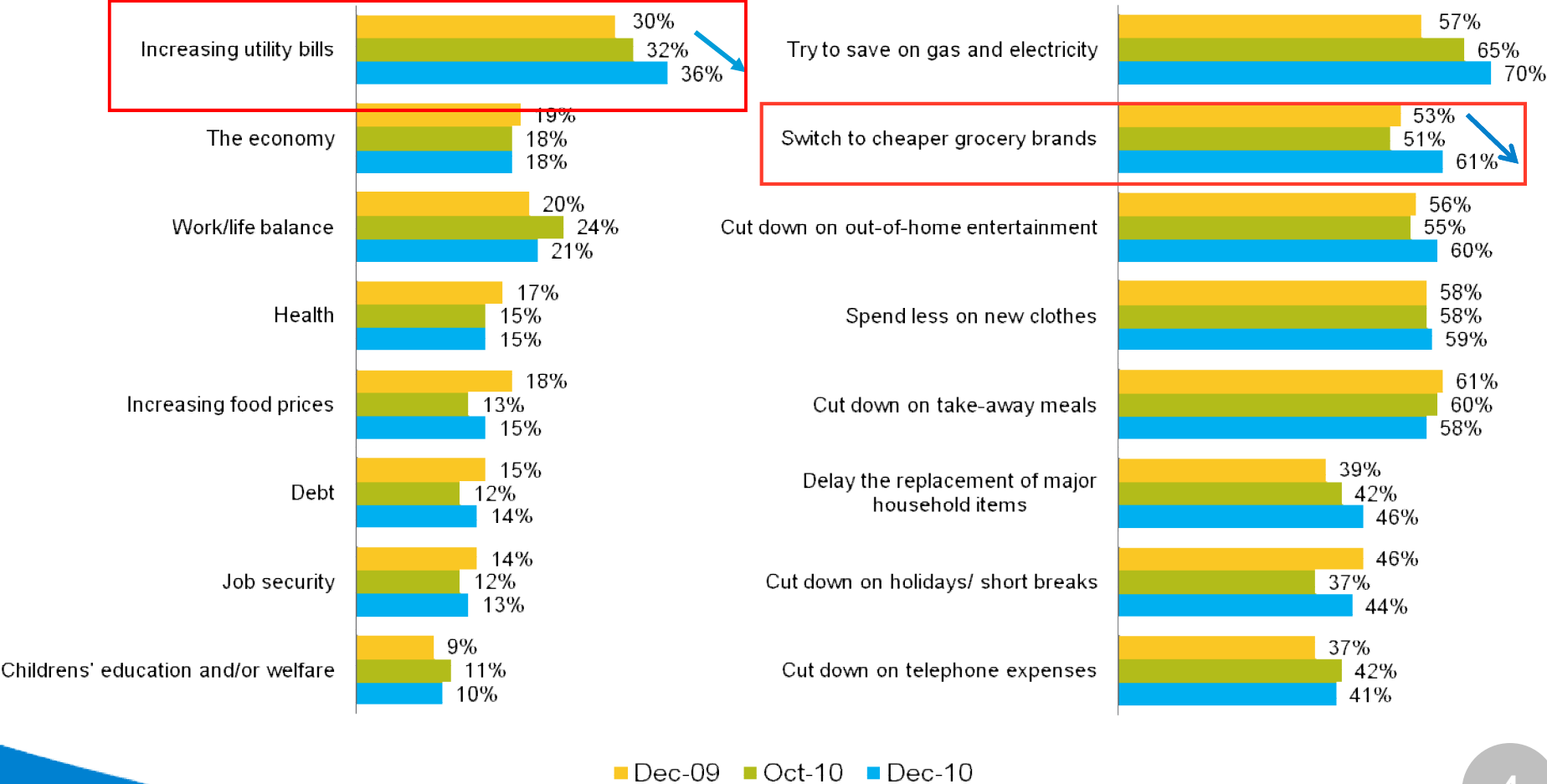
Source: Nielsen Australia Scan Track

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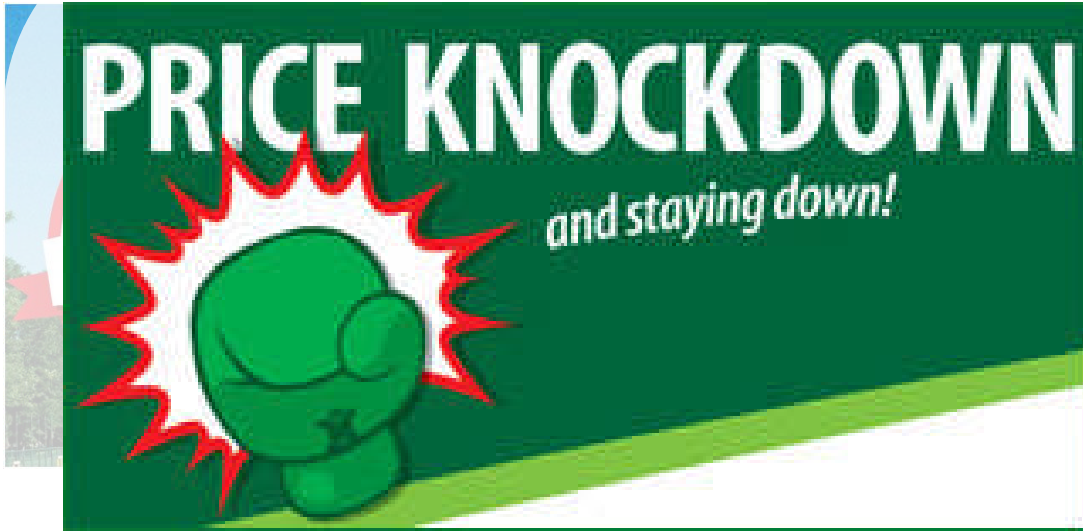
Rising Utility costs leads list of concerns: switching to cheaper grocery brands is increasingly a key action to offset rising living costs

Q. What are your two biggest concerns over the next six months?

Actions taken in order to save money compared to last year



From Equity to Value



Because we all buy toilet paper...

Not on special. Prices are **DOWN** and **STAYING DOWN**, every day!

→ Find out more

\$10



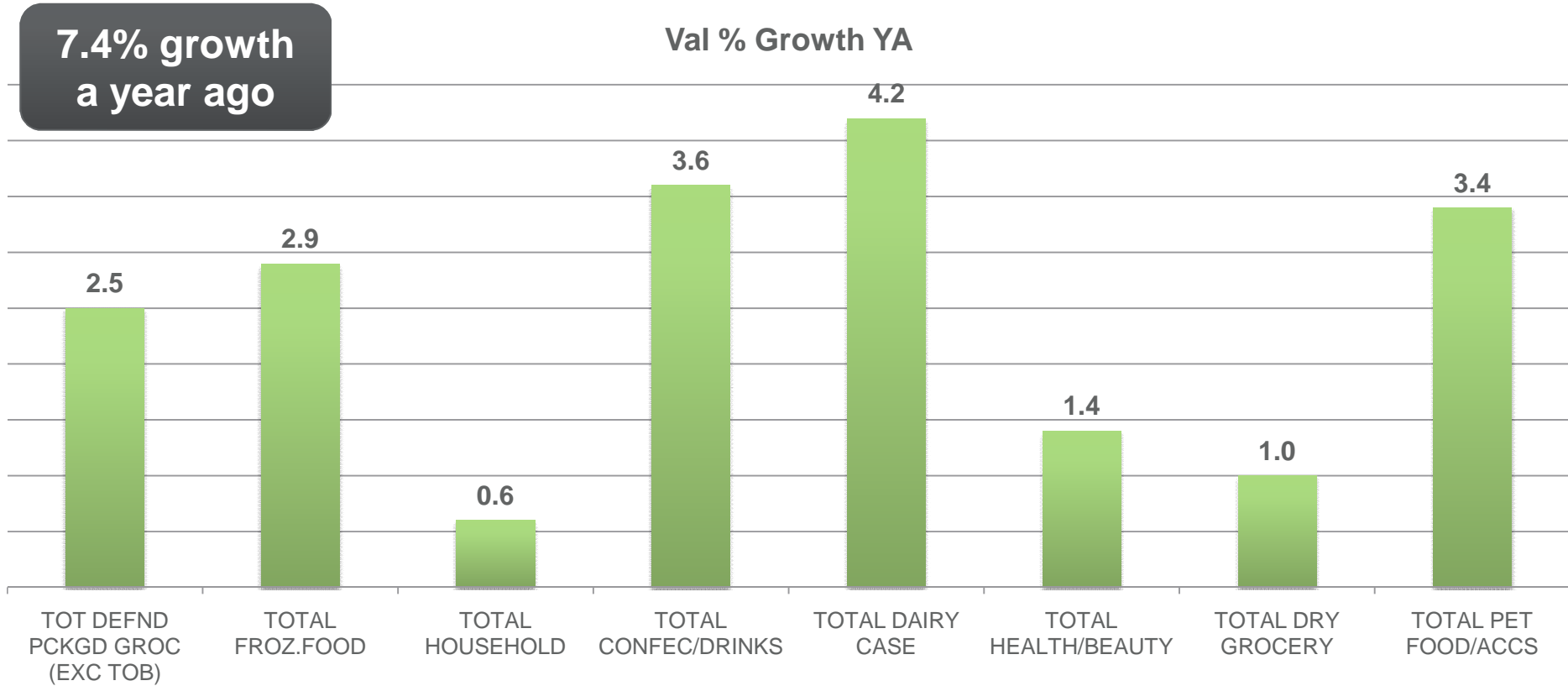
DOWN AND STAYING DOWN



\$2

DOWN AND STAYING DOWN

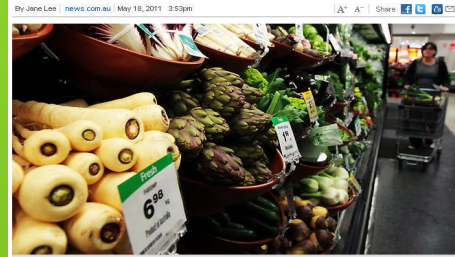
No surprise value growth has not been strong



So, what's happening in Fresh?



Woolworths to accept return of 'bad' produce with no questions asked

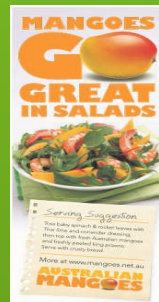


Woolworths has promised to return or exchange all fresh fruit and vegetables no questions asked. Picture: Renee Nowygrat



Supermarket Share
74.4% (+1 Share Pt)

18% Growth (22% share)



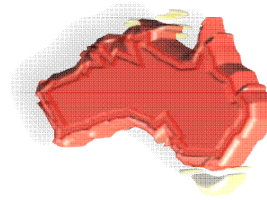
Need new ideas on
how to prepare



Fresh Produce has grown over the last year did grow, despite adverse weather impact, Produce is seeing inflationary growth

*Dollar Growth % Versus Year Ago
National: Data up to 14/5/2011*

Total Fresh Produce (incl. Nuts)



+4.3%



+6.0%

Grapes Performance

How is Grapes performing compared to Total Fresh Fruit?

Value % Growth – National Aus
Last 12 months to 06/08/2010



Total Fresh Fruit

Value Share

100%

Value Growth

2.9%



Total Grapes

8.2%

1.4%

Loose

97%

1.2%

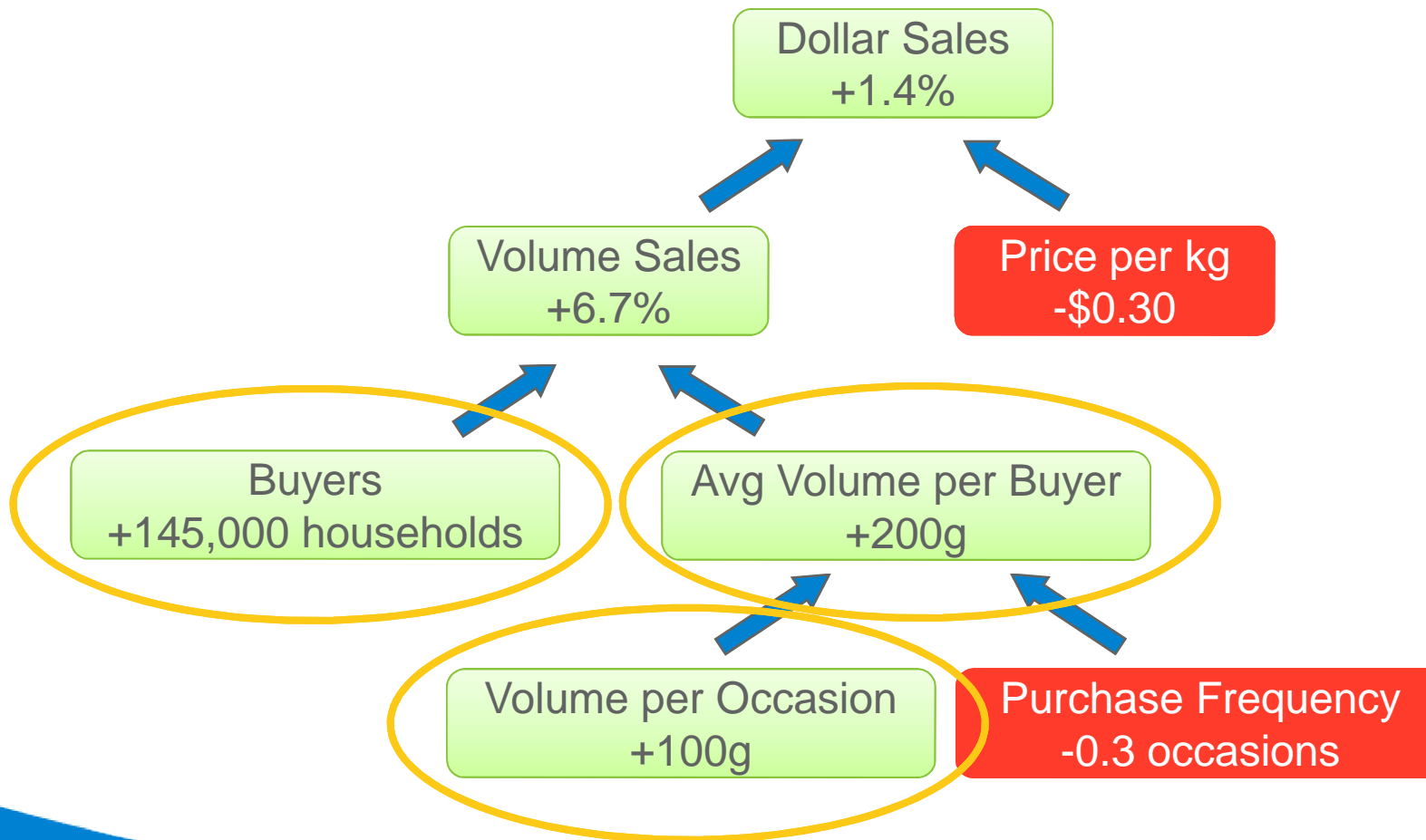
Pre-packed

3%

10.8%

Grapes Performance

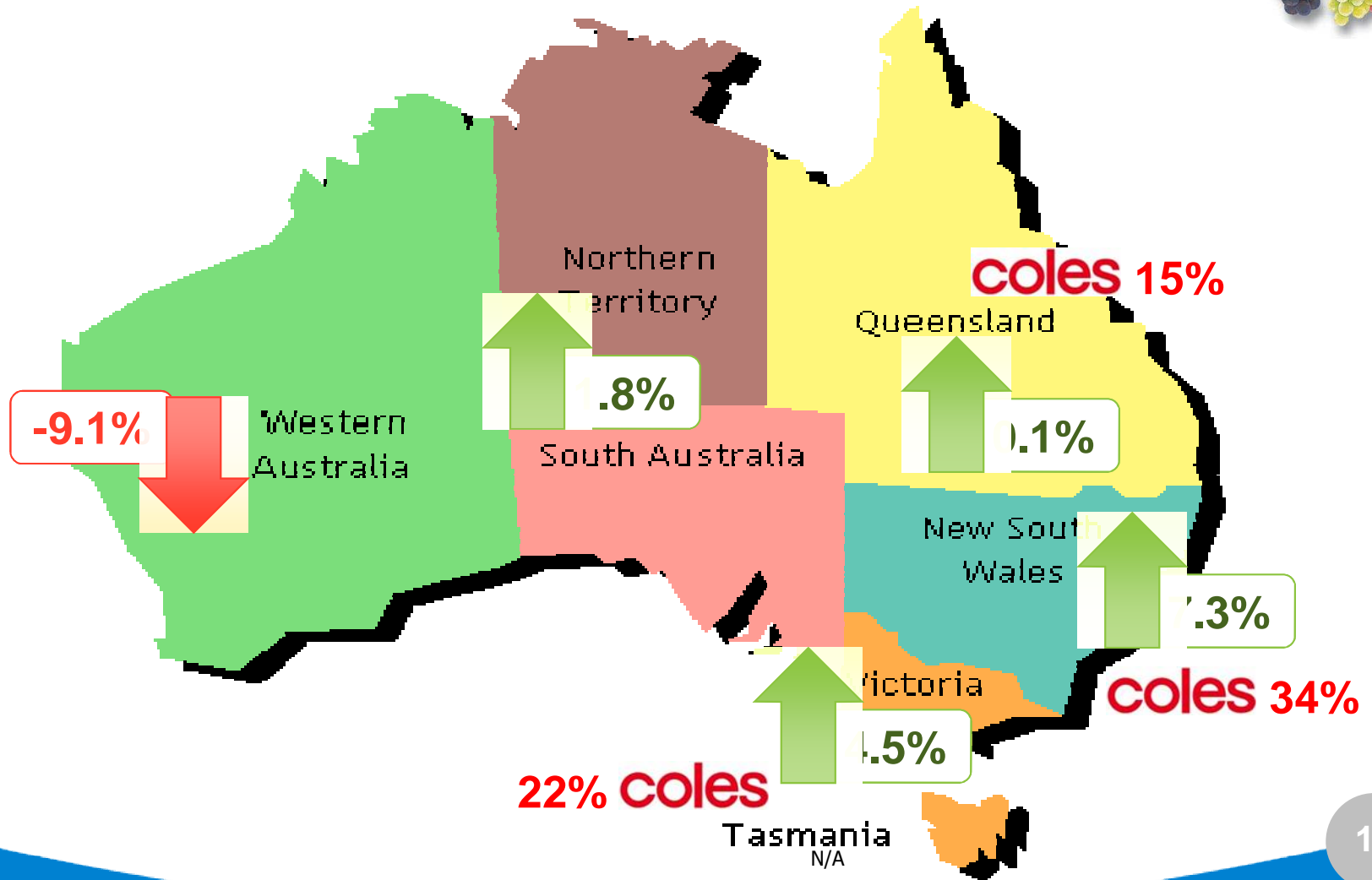
What has driven the growth for Grapes?



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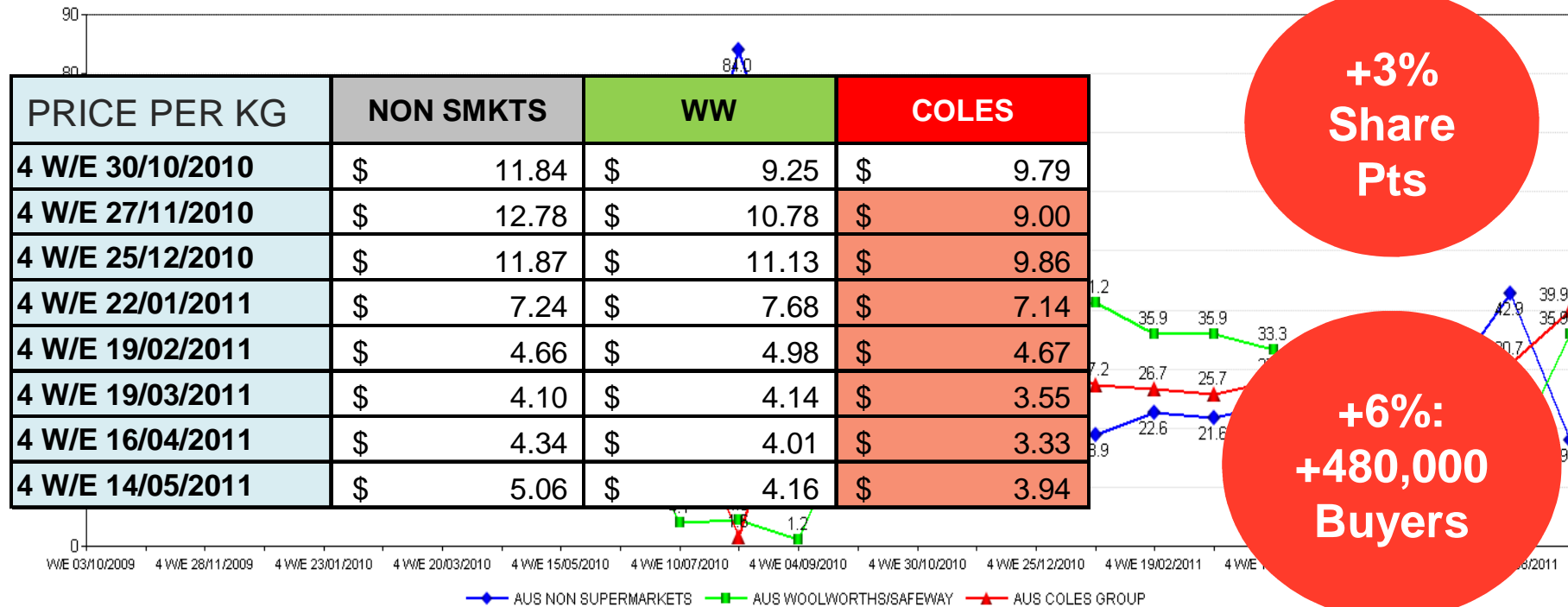
Grapes Performance

Where is the growth coming from?



Grapes Performance

What drove Coles' Success?



Grapes Performance

How does Grapes compare?

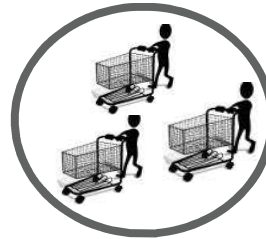


Shopper Penetration



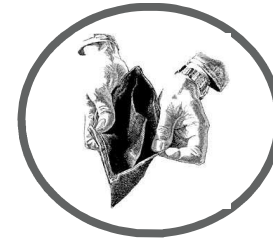
- #1 Bananas
- #2 Apples
- #3 Grapes**
- #4 Strawberries
- #5 Mandarins
- #6 Oranges

Purchase Frequency



- #1 Bananas
- #2 Apples
- #3 Pears
- #4 Grapes**
- #5 Strawberries
- #6 Oranges

Spend per Occasion



- #1 Blueberries
- #2 Cherries
- #3 Pawpaw
- #4 Mangoes
- #5 Strawberries
- #6 Lychees
- #7 Grapes**
- #8 Apples