



Consumption trends and insights – where does Australian citrus land?

Belinda Aanensen, Director

Fiftyfive5, part of Accenture Song



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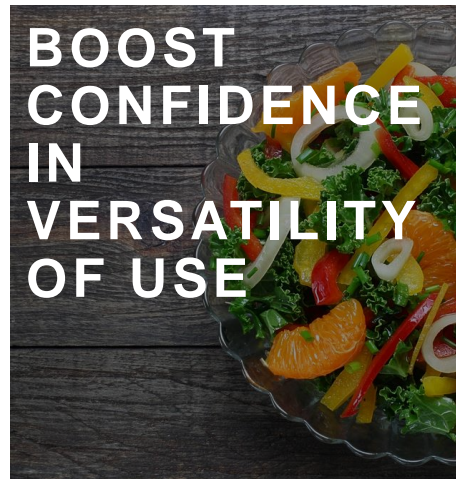
This project is funded by Hort Innovation using multi-industry strategic levies and contributions from the Australian Government.

STRATEGIES TO UNLOCK GROWTH

1



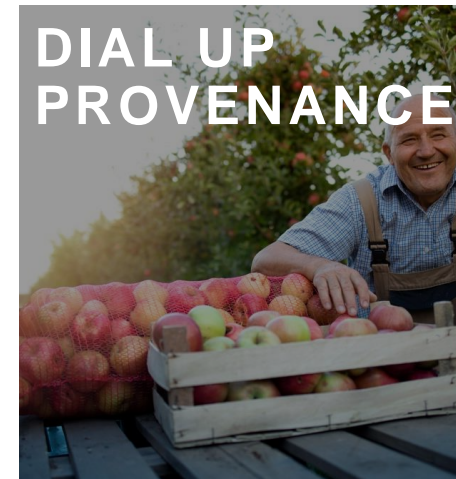
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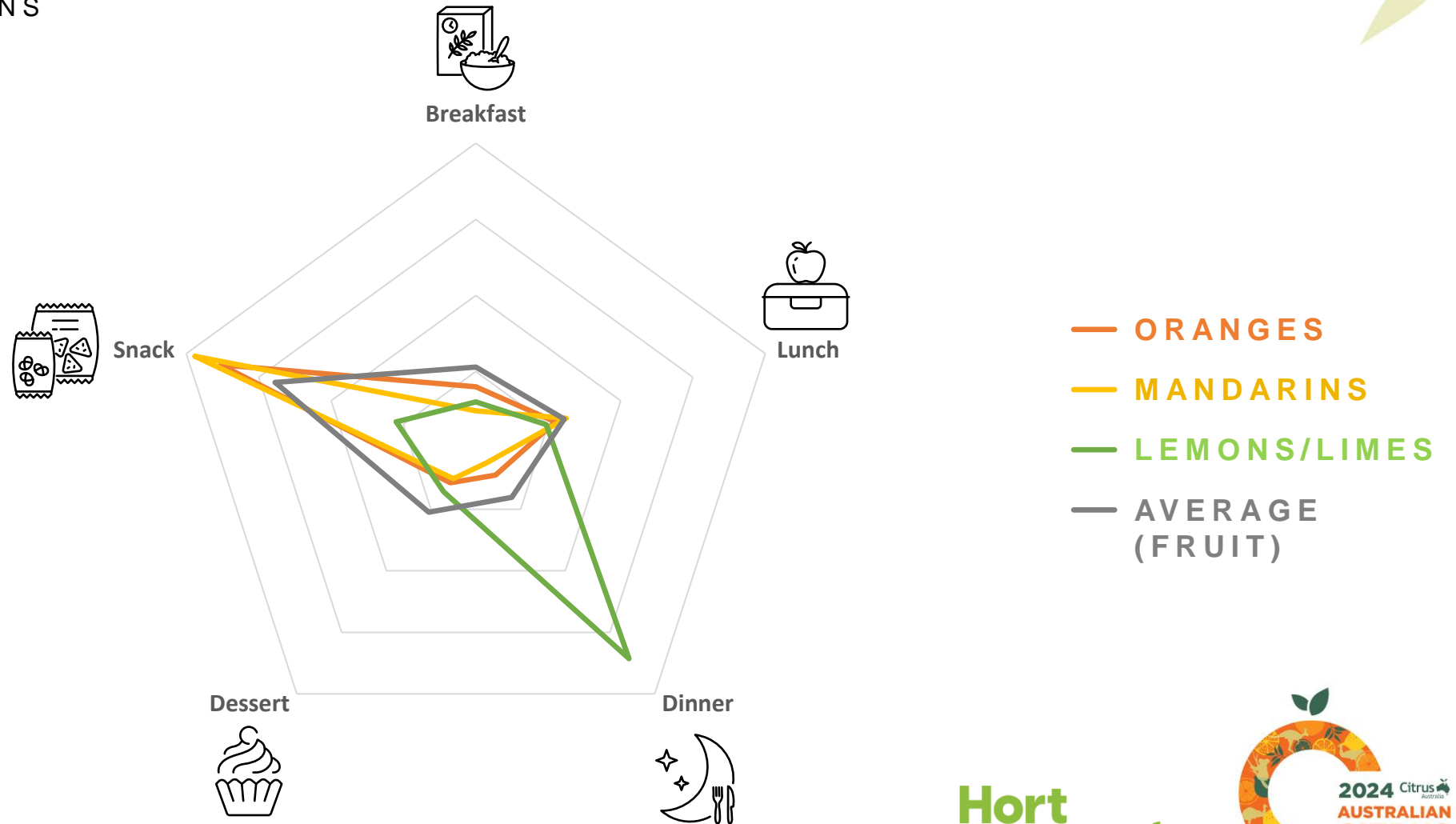




**LOOK
BEYOND
SNACKING**

THERE'S ROOM TO GROW CONSUMPTION IN MEAL OCCASIONS THROUGHOUT THE DAY

CONSUMPTION OCCASIONS



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Base: Buyers of each fruit in the past month or more recently (Sept '23 – Jan '24, Oranges n= 770, Mandarins n= 768, Lemons/Limes n= 769)
C7. On what occasion(s) did/ will you or your household consume the fresh fruit, vegetables or dried fruit/ nuts which you recently bought?

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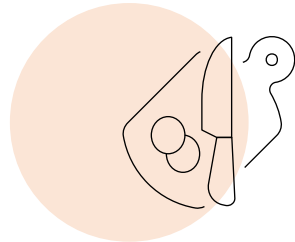
2

**BOOST
CONFIDENCE
IN VERSATILITY
OF USE**



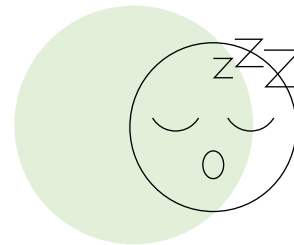
CITRUS BUYERS WANT TO BE CREATIVE WITH FOOD, BUT OFTEN GET STUCK IN A FOOD RUT

'SLIGHTLY' / 'STRONGLY' AGREE



56%

I enjoy being creative with food



79%

I tend to eat the same fruit & vegetables



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Base: Intending to buy Citrus in next 7 days (Sept '23 – Jan '24 n=1,923)

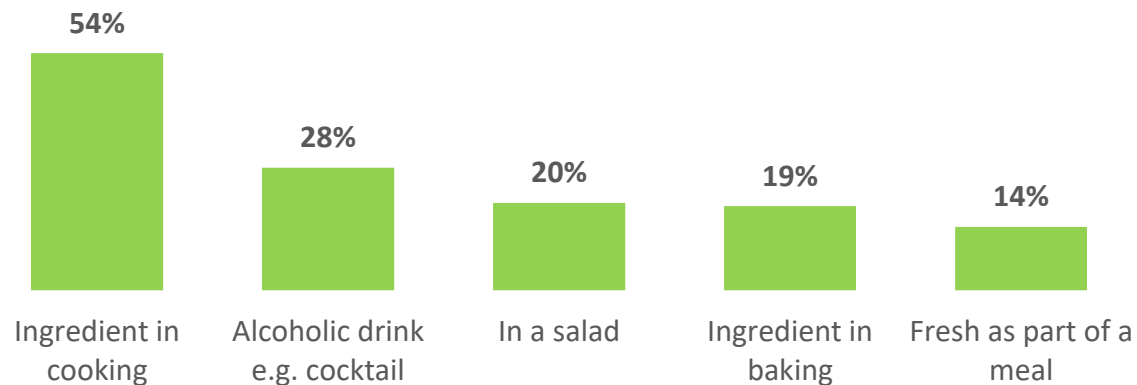
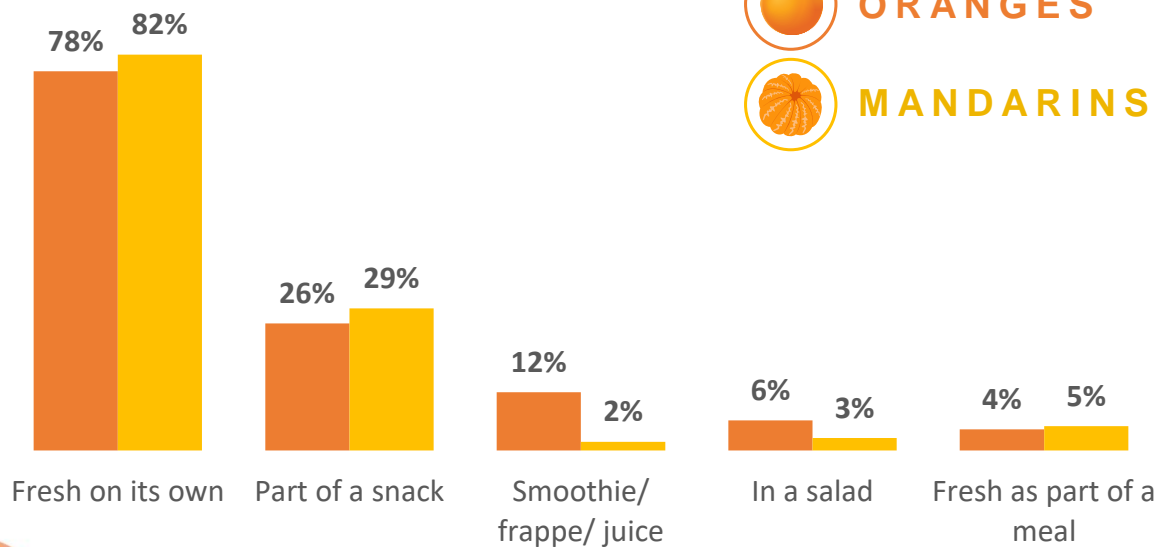
C15. Thinking about your lifestyle in general, please select to what extent you agree or disagree with the following statements?

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THERE IS PLENTY OF HEADROOM TO INSPIRE NEW WAYS OF EATING CITRUS

HOW EACH PRODUCE WAS CONSUMED – TOP 5



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Base: Buyers of each fruit in the past month or more recently (Sept '23 – Jan '24, Oranges n= 770, Mandarins n= 768, Lemons/Limes n= 769)
C9. And how did you consume / plan to consume the fresh fruit, vegetables or dried fruit/ nuts you bought in the past seven days?

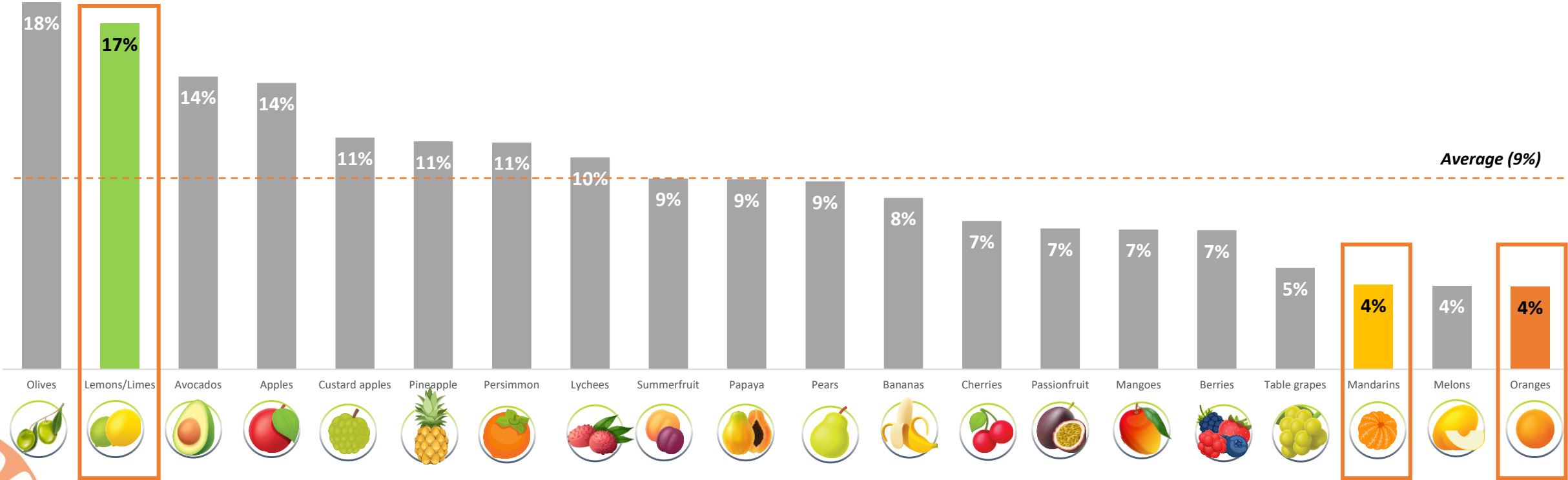
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INSPIRE WITH NEW COOKING IDEAS FOR LEMONS & LIMES; EDUCATION IS THE FOCUS FOR MANDARINS & ORANGES



ASSOCIATION WITH 'EASY TO COOK'



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Base: Sept '23 – Dec '23, All Respondents n=3,289
C12 – Perceptual Associations: Easy to cook

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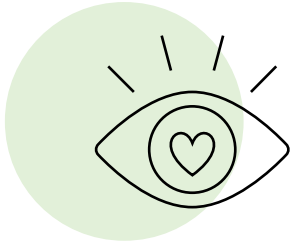


3

**FOCUS
ON 'LOVE'**

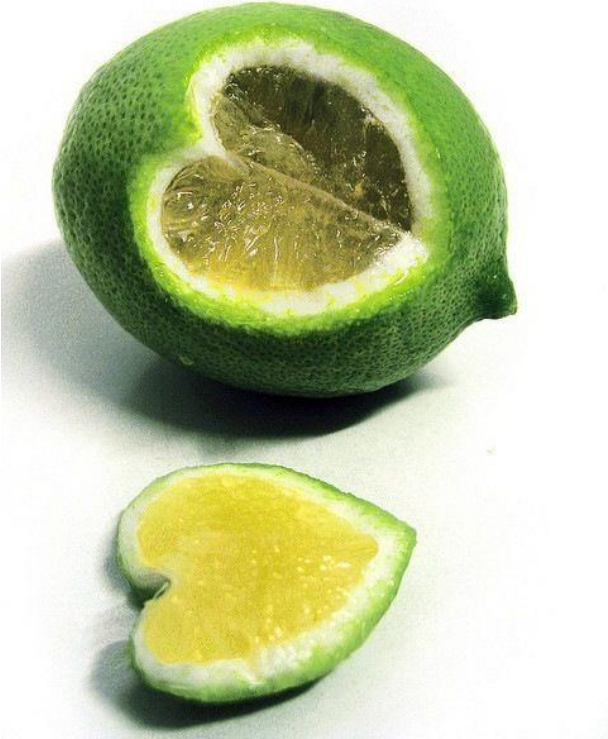
'LOVE' IS A KEY DRIVER OF PURCHASE

LOVE X PURCHASE BEHAVIOUR



2.2x

More likely to plan to buy the fruits they love in the next week



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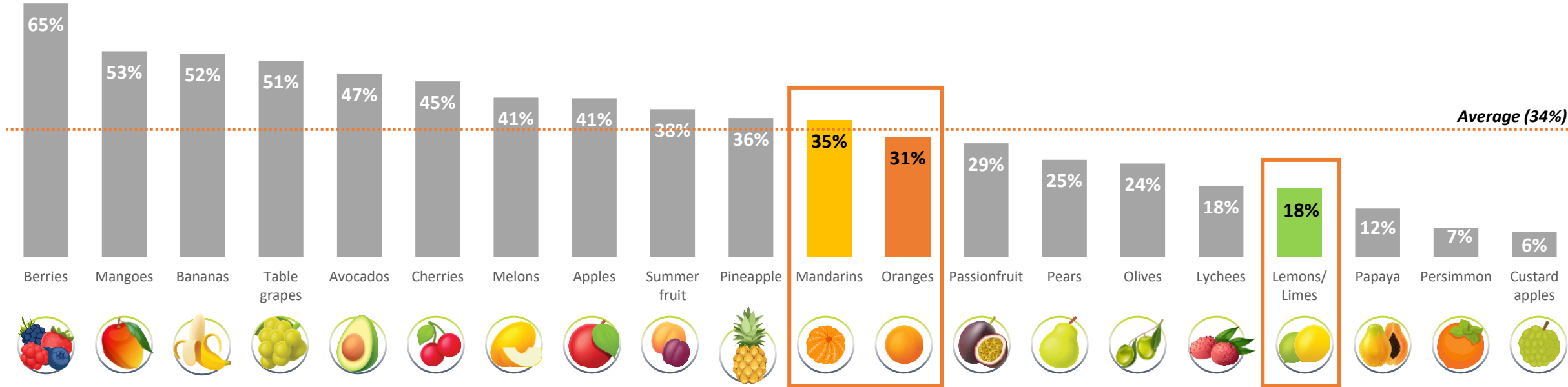
Base: Jul '22 – June '23, Those who love each category & purchased in P7D (min n=846) and those who do not love each category & purchased P7D (min n=245), Those who love each category & plan to purchase in N7D (min n=1,543) and those who do not love each category & plan to purchase N7D (min n=415)
C2. Which of the following fresh fruits, vegetables and dried fruits/nuts, do you plan to buy in the next seven days?
C13. Please now take a look at the list below, which shows lots of different types of fresh fruits, vegetables and dried fruits/ nuts. Whether you typically buy these or not, we'd like to know which of them, if any, you would describe as a product you LOVE to eat?

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MANDARINS & ORANGES ON PAR, BUT SIGNIFICANT HEADROOM FOR LEMONS & LIMES TO BE MORE 'LOVED'

% LOVE TO EAT



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Base: Sept '23 to Dec '23 n= 210 – 2,152
C13. Please now take a look at the list below, which shows lots of different types of fresh fruits, vegetables and dried fruits/ nuts. Whether you typically buy these or not, we'd like to know which of them, if any, you would describe as a product you LOVE to eat?

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TO DRIVE EMOTIONAL CONNECTION ('LOVE'), TASTE & FLAVOUR ENHANCEMENT IS KEY

LOVE X ASSOCIATIONS

1.6x More likely to love if they
associate with **DELICIOUS**

1.3x More likely to love if they
associate with **HEALTHY**



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Base: Jul '22 – June '23, Respondents who have purchased [CATEGORY] in the last 7 days
C13. Whether you typically buy these or not, we'd like to know which of them, if any, you would describe as a product you LOVE to eat?
C12. Which of the following words would you associate with [CATEGORY]?

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4

**DIAL UP
PROVENANCE**



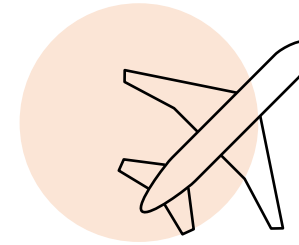
BUYERS TRUST IN NATIONALLY GROWN PRODUCE, QUESTIONING THE QUALITY OF IMPORTED

ATTITUDES TO ORIGIN – JUNE 2023



71%

AGREE that Australian produce is better quality than imported produce



26%

TRUST the quality of imported produce



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Base: All respondents, June '23 (n=838)

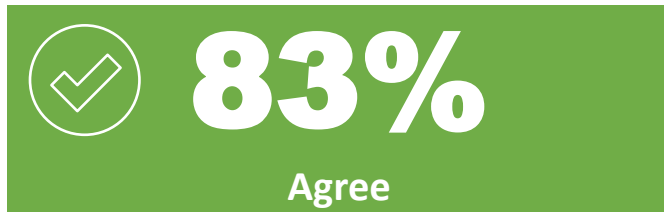
OR4. To what extent do you agree or disagree with each of the following statements?

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CONSUMERS PREFER TO BUY AUSTRALIAN – BUT STRUGGLE TO KNOW WHERE THEIR PRODUCE COMES FROM

EASE OF DETERMINING COUNTRY OF ORIGIN IN-STORE – JUNE 2023



I prefer to buy Australian fresh produce whenever possible.



It's easy to know where fruits and vegetables come from when buying them in stores.



I know that Australian produce is good quality, it is likely to be fresher as it has not travelled very far and has not need to be frozen for transport.



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Base: All respondents, June '23 (n=838)

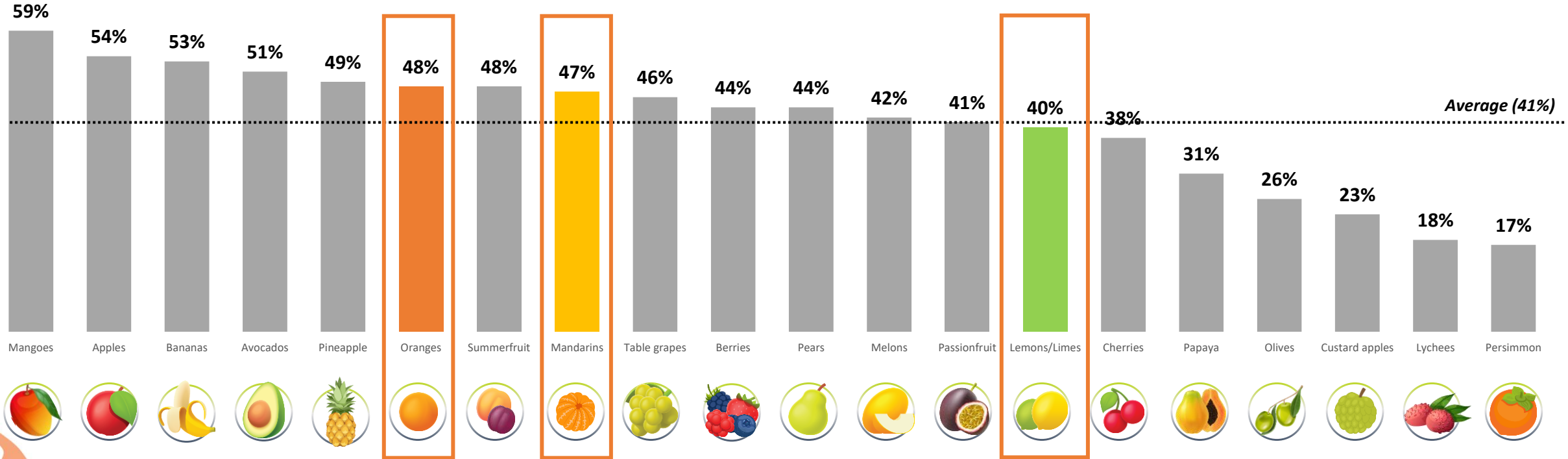
OR4. To what extent do you agree or disagree with each of the following statements?

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NO FRUIT CATEGORY OWNS 'AUSTRALIAN'; CLEAR OPPORTUNITY TO GROW AND CLAIM OWNERSHIP

ASSOCIATION WITH BEING 'AUSTRALIAN'



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Base: Buyers of each fruit in the past month or more recently (Sept 23 – Dec 23 min n=140)

C12. We'd like to understand what you associate with each of the following products you bought recently. Please select which, if any, of the following you associate with each...

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THANK YOU

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