Pistachio
Brand Health
& Demographics

Source: Nielsen Homescan data until 14th Apr 2012

Pistachios...

An additional 145k Australian households purchased Pistachio during the latest MAT, spending an average of $18.7 on 0.8 kilos of this commodity.

Increase in average spend per household was a result of a raise in the amount spend per shipping trip, however volume indicators remained steady in the same period.

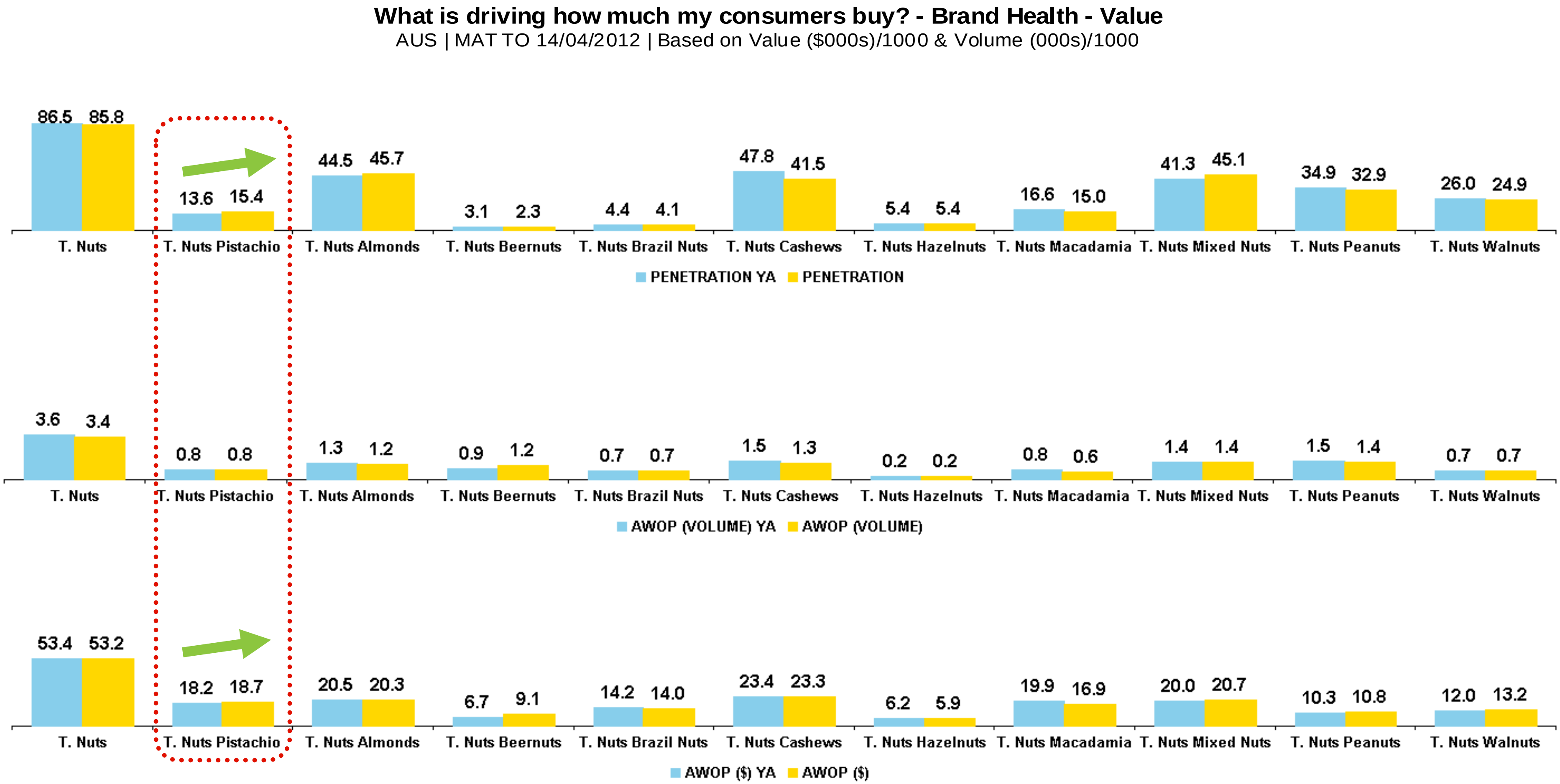
Queensland and Victoria have increased their share at the expense of NSW, however NSW is still the most important state from a value perspective.

Senior Couples, and Bustling and Start Up Families showed significant increases in penetration when compared to other demographics

Key Measures

Pistachio Penetration and $AWOP have increased in the latest MAT, while AWOP volume remained steady.

Know-how for Horticulture™



Source: Nielsen l Homescan Australia

AWOP volume has remained flat as a result of no variation on purchase frequency and purchase size per shopping trip.

What is driving how much my consumers buy? - Brand Health - Value

AUS | MAT TO 14/04/2012 | Based on Value ($000s)/1000 & Volume (000s)/1000

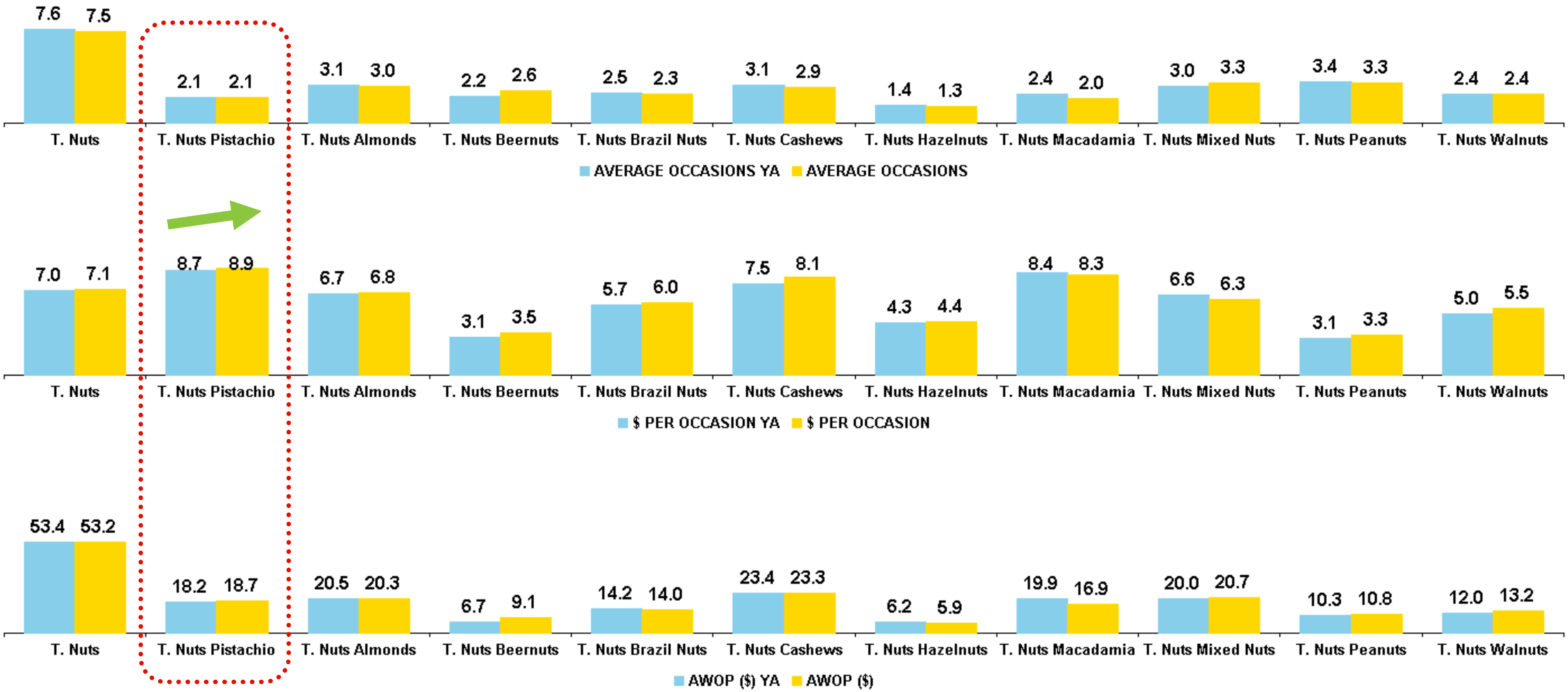
Source: Nielsen I Homescan Australia

Increase in average spend on Pistachios was due to an increase in spending per shopping trip.

Know-how for Horticulture™

What is driving how much my consumers buy? - Brand Health - Value

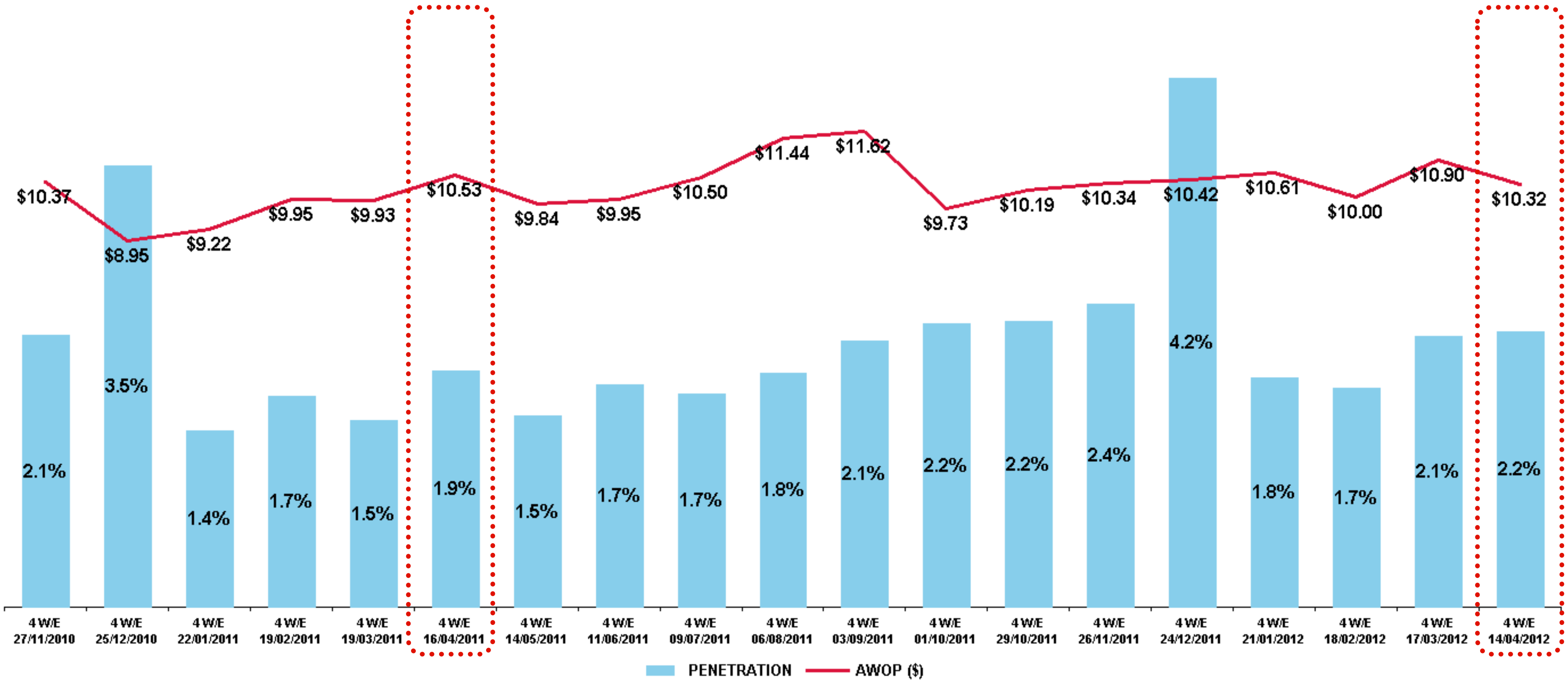
AUS | MAT TO 14/04/2012 | Based on Value ($000s)/1000 & Volume(000s)/1000



Source: Nielsen I Homescan Australia

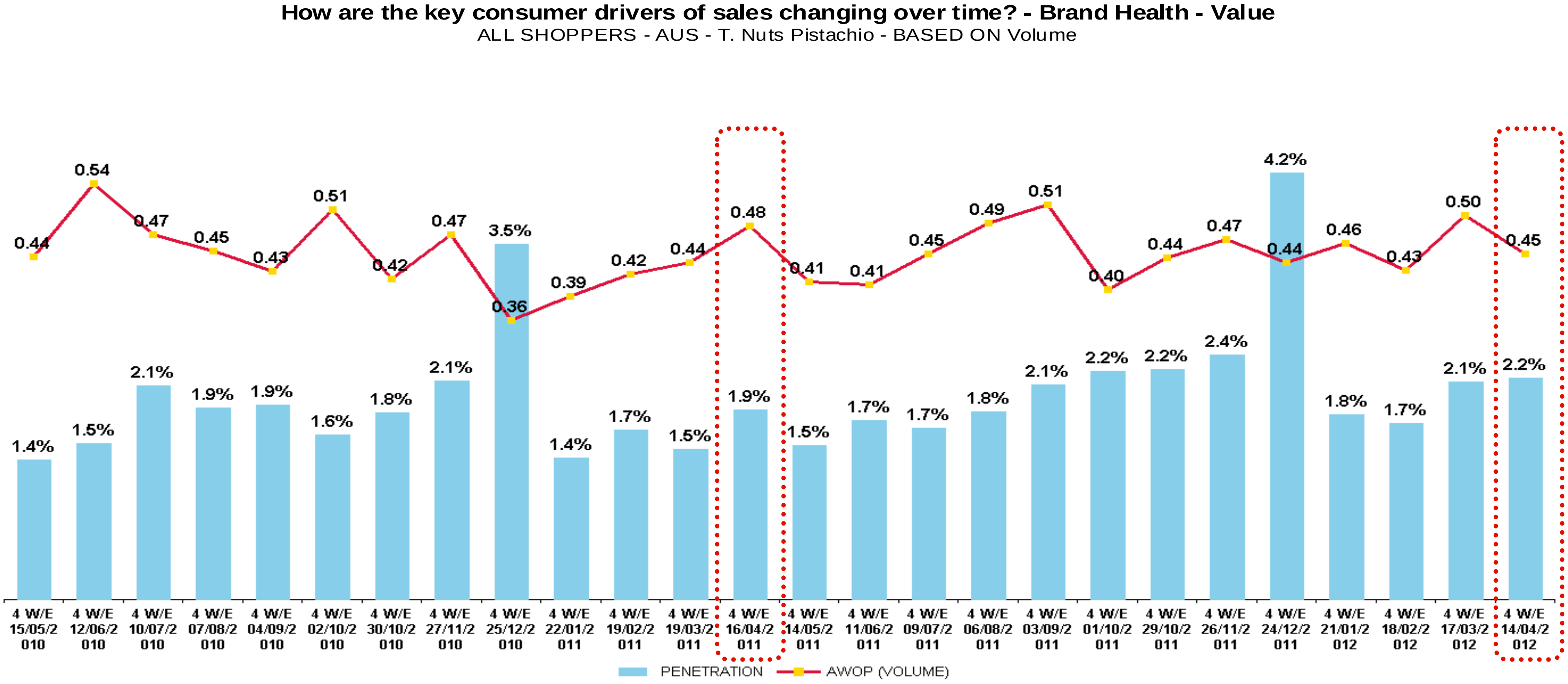
While more households purchased Pistachios in the latest 4-weekly period versus a year ago, average spend showed a slight decreased.

How are the key consumer drivers of sales changing over time? - Brand Health - Value
ALL SHOPPERS - AUS - T. Nuts Pistachio - BASED ON VALUE ($000'S)/1000



Source: Nielsen I Homescan Australia

Similarly, AWOP volume has also slightly decreased in the same period compared to a year ago

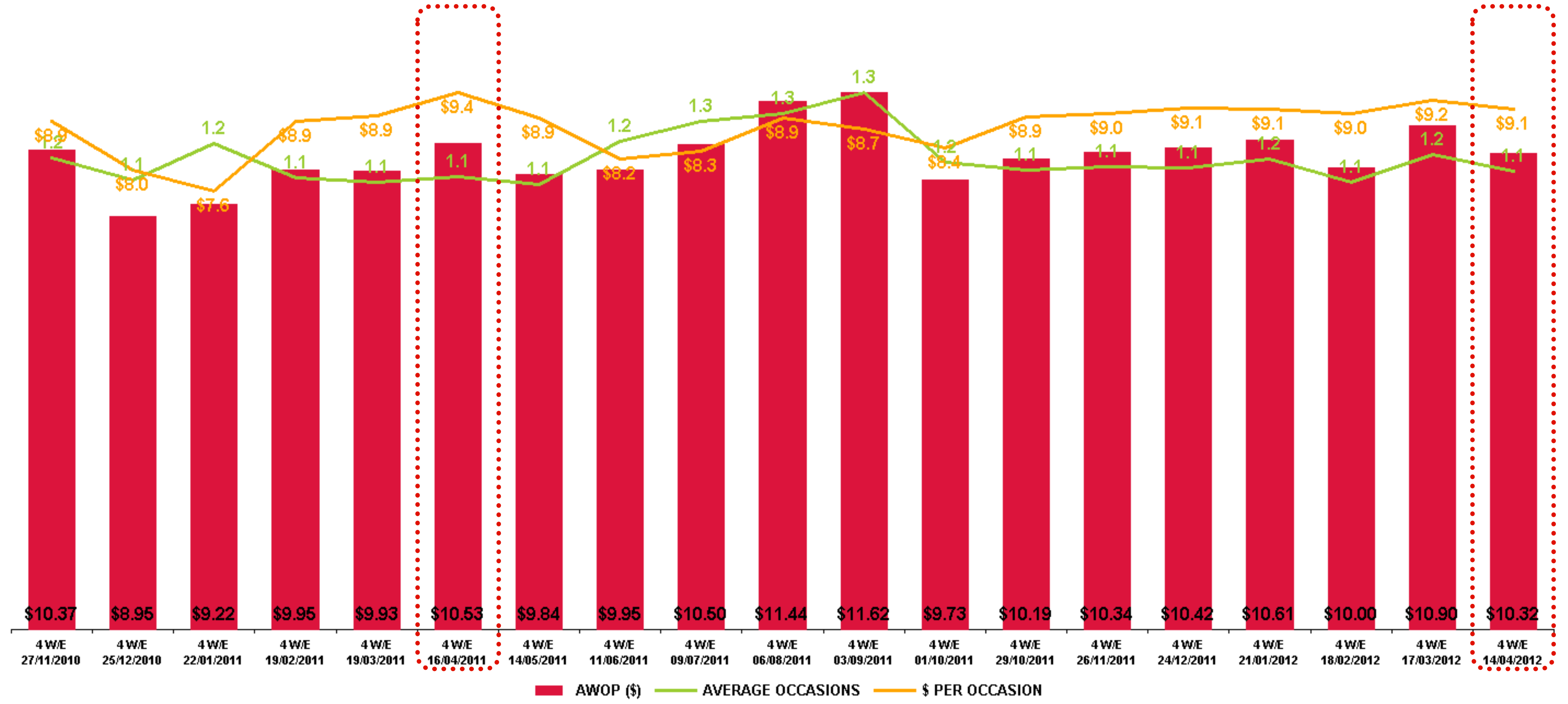


Source: Nielsen Homescan® Aus

While there are no significant variations in the latest 12 months, a slight decrease in spend per occasion negatively impacted on the average spend for the period.

What is driving how much my consumers buy over time? - Brand Health - Value

ALL SHOPPERS - AUS - T. Nuts Pistachio - BASED ON VALUE ($000'S)/1000

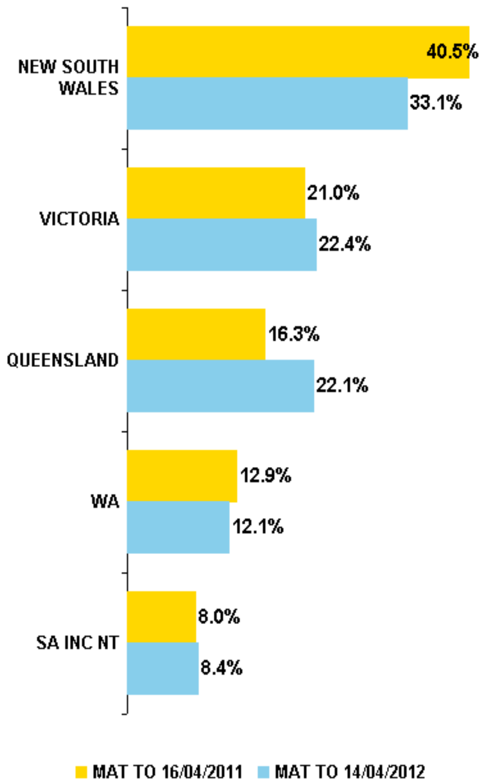


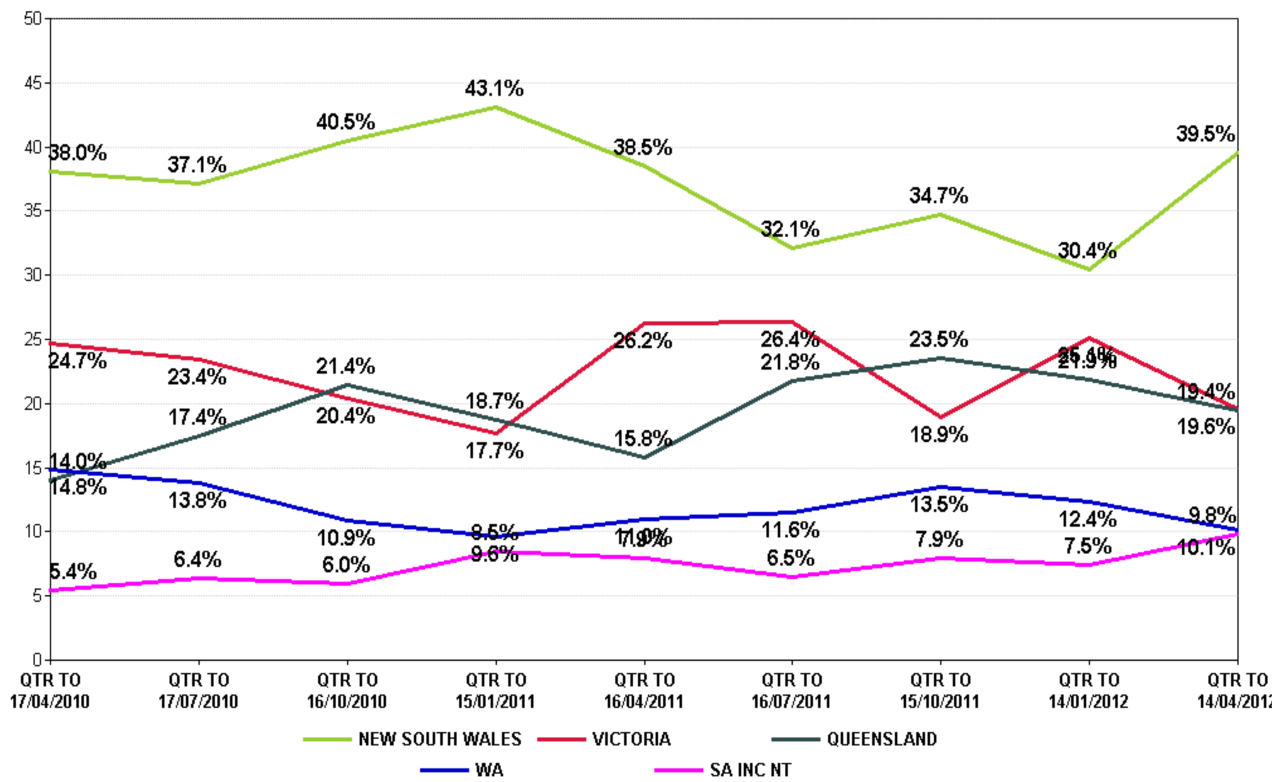
Source: Nielsen Home scan data until 14th Apr 2012 # HIFVDHAL

Queensland and Victoria have increased their share of trade at the expense of NSW in the latest MAT, however NSW increased its share during the latest quarter

What is driving grocery sales? (Account Comparison) - Bigger Picture - Value

ALL SHOPPERS - T. Pistachio - SHARE OF TRADE ($)





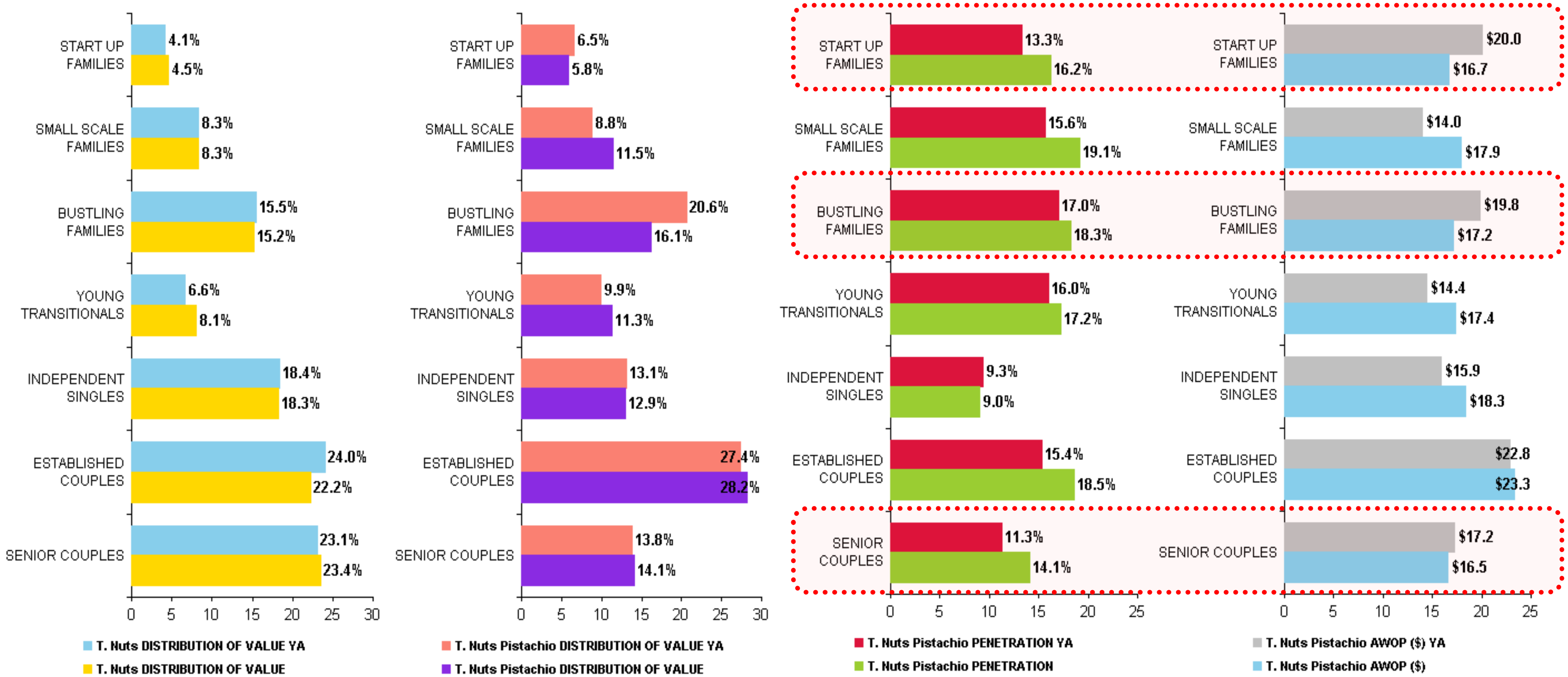
Source: Nielsen l Homescan Australia

Demographics

Start Up and Bustling Families and Senior Couples experienced higher penetration, however there is room for opportunity to increase their average spend

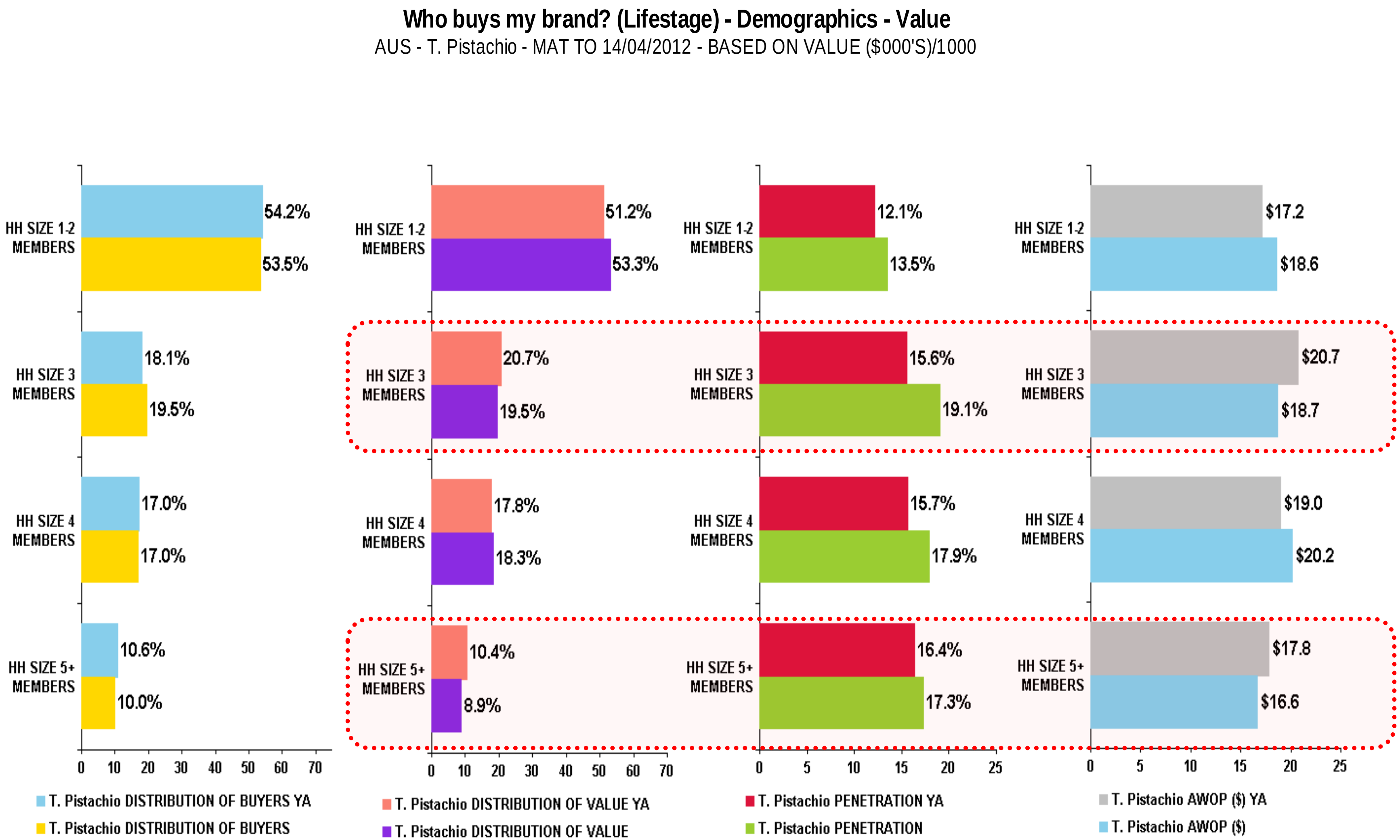
Who buys my brand? (Lifestage) - Demographics - Value

AUS - T. Nuts Pistachio - MAT TO 14/04/2012 - BASED ON VALUE ($000'S)/1000



Source: Nielsen I Homescan Australia

All household sizes increased their penetration, however 3 member and 5+ member households showed a reduced $AWOP

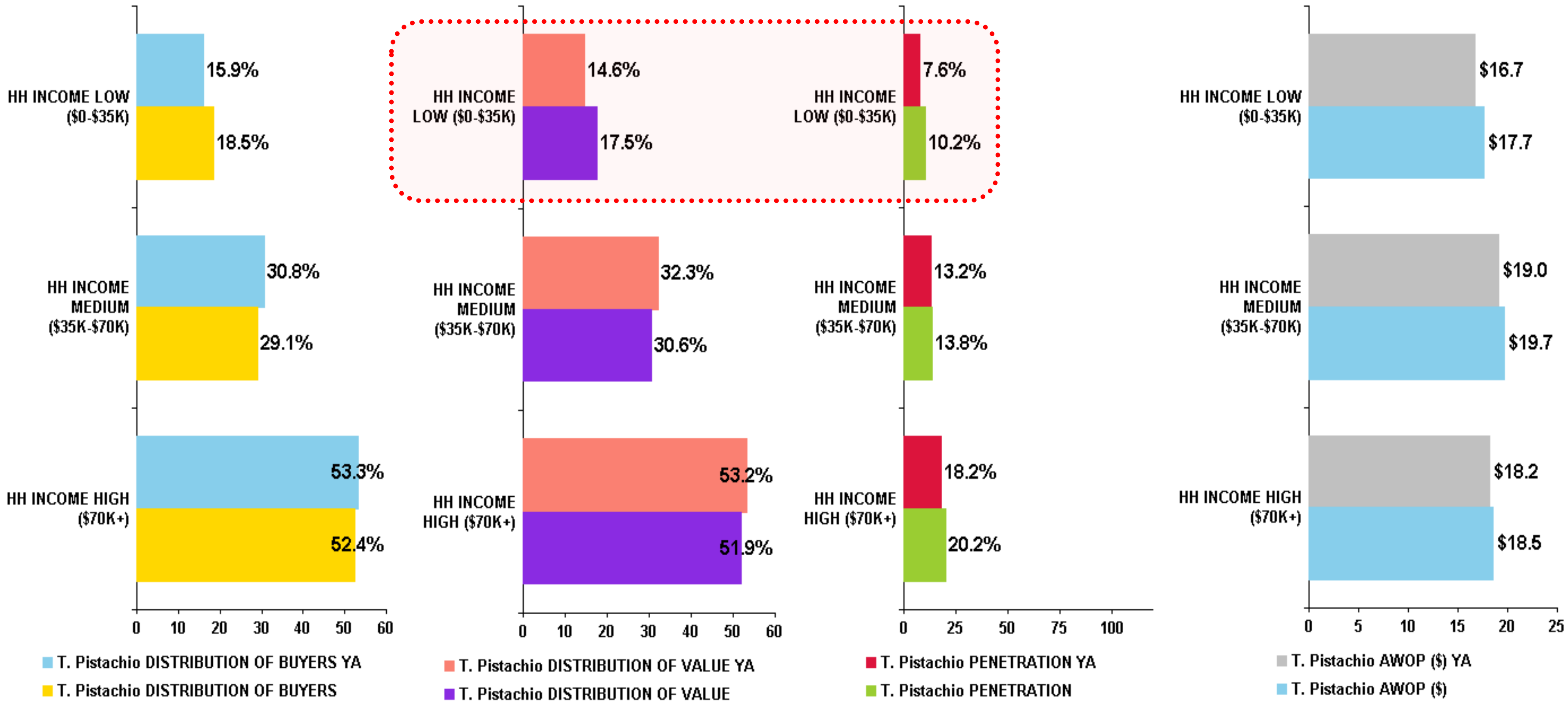


Source: Nielsen I Homescan Australia

Pistachio penetration and average spend increased at Low Income households during the latest MAT

Who buys my brand? (Lifestage) - Demographics - Value

AUS - T. Pistachio - MAT TO 14/04/2012 - BASED ON VALUE ($000'S)/1000



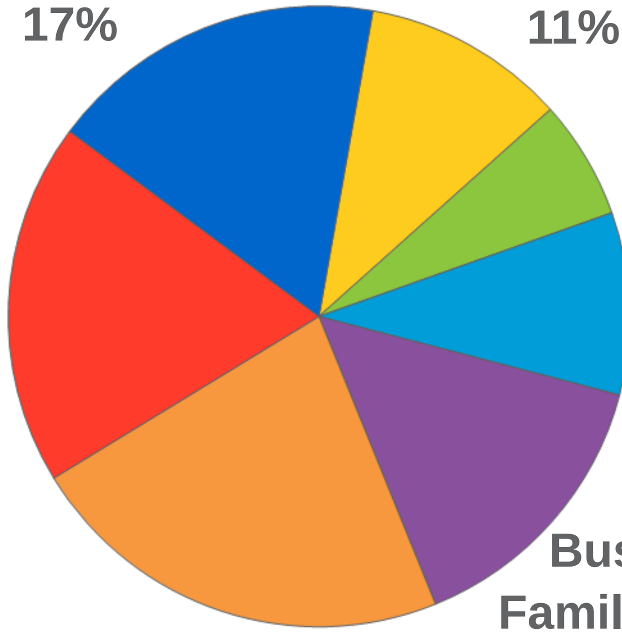
Source: Nielsen I Homescan Australia

Glossary

Terms

- **Penetration** – The proportion of households purchasing a product in the specified period expressed as a percentage of all households.
- **Average Weight of Purchase (AWOP)** – The average volume/value/units of a product bought across all buyers of that product in the specified period.
- **Occasions Per Buyer** – The average no. of times each buyer purchases the specified product in a specified period. A product/date/shop combination, eg. a household purchasing 2 identical products on a shopping trip to Woolworths constitutes a single purchase occasion.
- **Amount Per Occasion** – Average value or units purchased on each purchase occasion.
- **QTR** – Quarter year; rolling 13 weeks.
- **MAT** – Moving annual total; a rolling yearly total which accumulates 52 weeks of data.
- **PP** – Prior Period
- **YA** – Year Ago.

Lifestages Distribution



Senior Couples 17%

Young Transitionals 11%

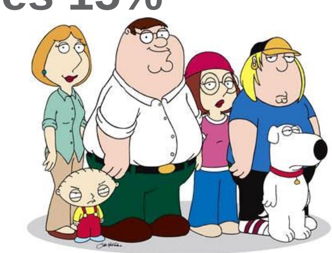
Start Up Families 6%

Small Scale Families 10%

Bustling Families 15%

Independent Singles 22%

Established Households 19%



MAT 24/Dec/2011

- **Young Transitionals (Any Size HHs, No Children, <35):** Hopping from uni classrooms to first jobs to "just married" this group is characterised by an abundance of freedom. With the majority between 25-34 years in white collar professions, You will often find them with money to burn in the dance clubs, bars, shopping on the Internet or at local gyms. They enjoy physically active lifestyles, dining out and professional sporting events. This segment tends to live in rented apartment buildings and the internet is part of everyday life
- **Start-Up Families (HHs with Young Children Only < 6):** Characterised by households with 1-2 children and a mortgage to boot, Nappies, baby food and shelves overflowing with toys fill the home of the Start-Up Family. Entering a life of nappy changes and late night feedings, these consumers are starting their families. Dependent children and their impact on the lives of these 'new' parents sets these consumers apart from the other life stages.
- **Small Scale Families (HHs with Oldest Child 6-11):** Unlike the other life stages with children, the small size of these families often allows the adults to strike a balance between their children and pursuing their own interests. Whether they are single parent families with one or two children or two parent families with one child – time, convenience items, are of increasing importance as many of them work to pay the bills and pay off their mortgage.
- **Bustling Families (HHs with Children (Oldest 12+)):** A mix of younger and older families with the eldest child in their teens skewed toward households of 5 more people. These consumers' lives are hives of activity. With most Heads of Households over 40 years of age. With a higher prevalence of internet access than any other group and 3 or more TV sets running at any one time these households are embracing the information age. The children in these households are dependent on their parents for many things. At the peak of their earning power, these households work hard to afford their children the latest trend; which often means both parents are working.
- **Independent Singles (1 Person HHs, No Children, 35+):** Predominantly female households, split between older and younger consumers, most consumers get to this life stage either through divorce or from never having been married. 79% of this group over 50 years of age, paid off their mortgage, and typically have a lower than average annual income. In addition, this has the lowest levels of internet access than any group (39%). With the 21% who are at the younger end of their life, you will find these consumers living in apartments, are often working in professional white collar established careers dining out with friends or working late in the office.
- **Established Couples (2+ Person HHs, No Children, 35 – 59):** This group is a mix of empty nesters, those who have not had children or those who still have adult children (>17) at home. Many are dual income families reaching their peak earning potential with above average household incomes split between those who own and are still mortgaging their home. They tend to live in large houses and can afford the often three TV's, internet access and all the mod cons our busy lifestyles have become accustom to.
- **Senior Couples (2+ Person HHs, No Children, 60+):** Companionship, rather than age, most influences the behaviour of this group. You might find the husband reading the latest issue of *Reader's Digest* as his wife knits in her chair. They are quite active, but not as active as Established Households. In addition, Senior Couples are more likely to still live in the family home, a larger house left over from family life with children. At 86%, this life stage has the highest level of home ownership.

Thank You