



Know-how for Horticulture™

Pistachio Brand Health & Demographics

Source: Nielsen Homescan data until 14th May 2011



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Pistachios.....



Over the last year, nearly 13.4% of Australian Households purchased Pistachios; with Households spending on average \$17.8 on Pistachio during the period

Shoppers of Pistachio have bought Pistachio 2 times over the year and are spending on average, \$8.7 on it per trip



Household reach for the commodity increased during the Christmas period vs. YA

Pistachios.....

Over the last year, Established Couples and Bustling Families have had the most significant contribution of around 50% to value sales of Pistachio.



While Bustling Families over index for Pistachios, opportunity exists to develop Senior Couples

While Woolworths has held a dominating share of Pistachio with 36.3% share, Pistachios are well developed in Coles however have seen significant decline in share of trade in the latest quarter.



Key Measures

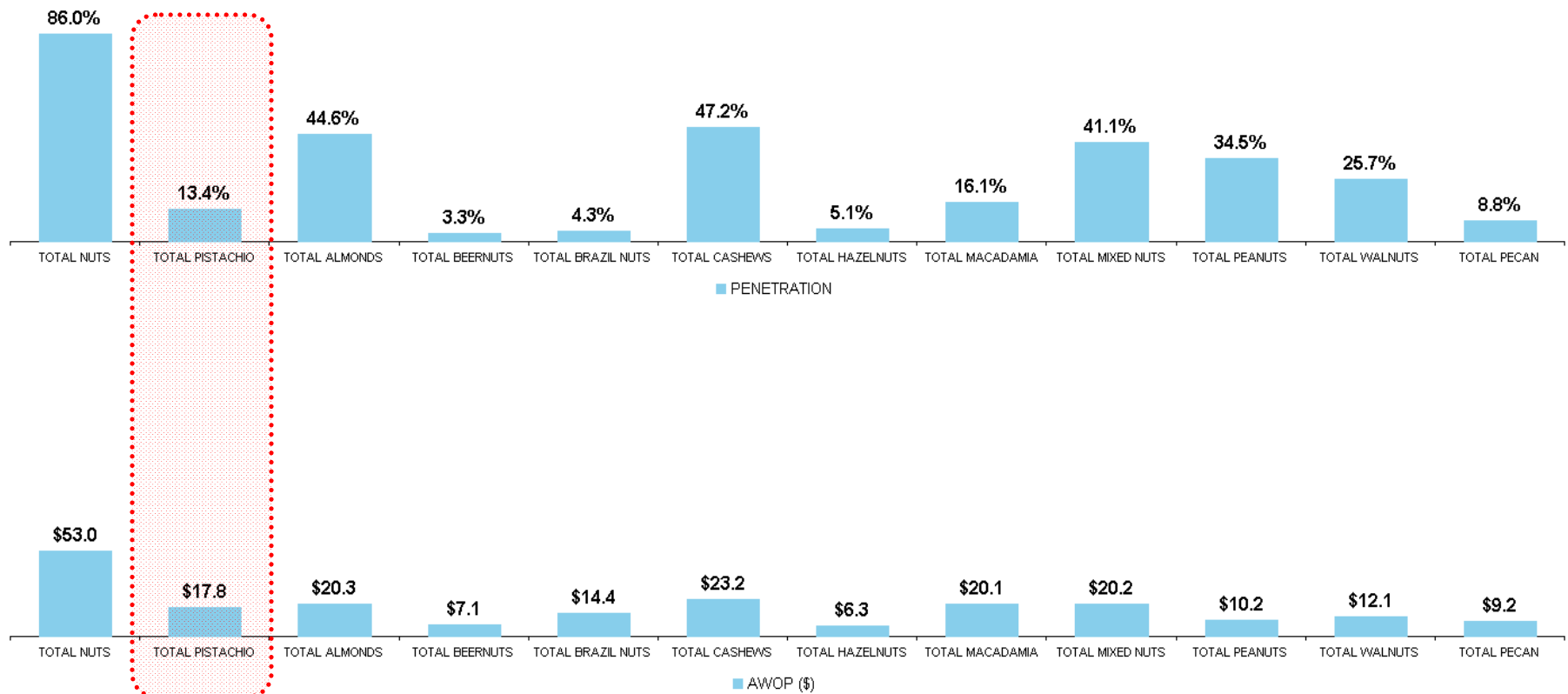
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Over the last year, nearly 13.4% of Australian Households purchased Pistachios; with Households spending on average \$17.8 on Pistachio during the period



What are the key consumer drivers of sales? - Brand Health - Value
 ALL SHOPPERS - AUS - MAT TO 14/05/2011 - BASED ON VALUE (\$000'S)/1000



Source: Nielsen Homescan Australia (HIFVDHAL)

Shoppers of Pistachio have bought Pistachio 2 times over the year and are spending on average, \$8.7 on it per trip



What is driving how much my consumers buy? - Brand Health - Value
 ALL SHOPPERS - AUS - MAT TO 14/05/2011 - BASED ON VALUE (\$000'S)/1000

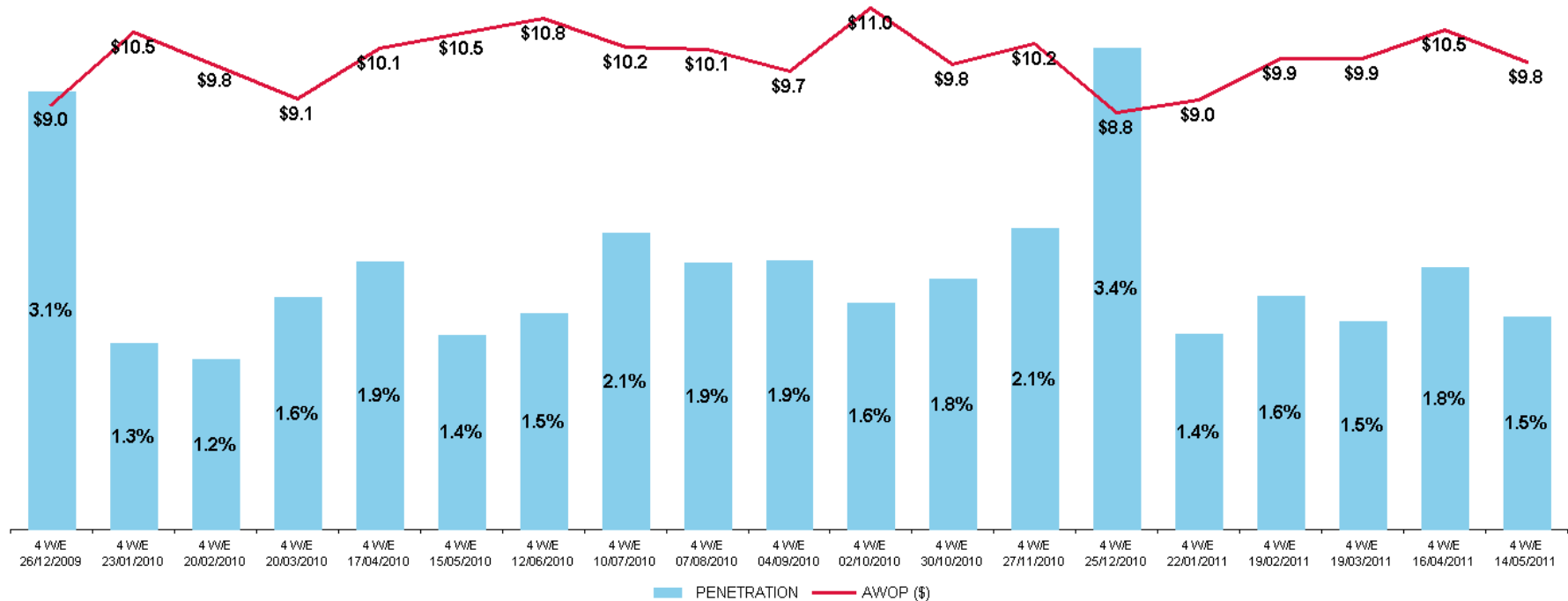


Source: Nielsen Homescan Australia (HIFVDHAL)

Household reach for the commodity increased during the Christmas period vs. YA



How are the key consumer drivers of sales changing over time? - Brand Health - Value
 ALL SHOPPERS - AUS - TOTAL PISTACHIO - BASED ON VALUE (\$000'S)/1000

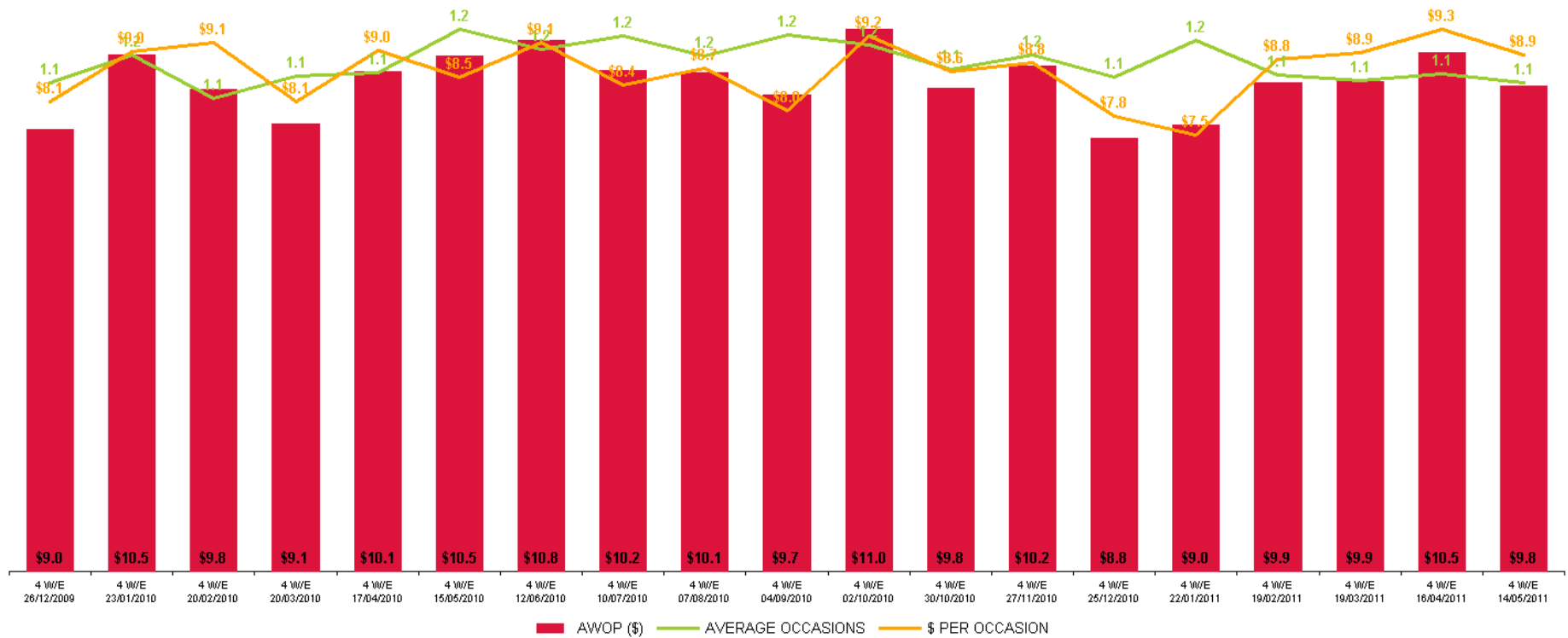


Source: Nielsen Homescan Australia (HIFVDHAL)

Average household spend and trips per household fluctuates throughout the year however no real peaks or troughs can be seen.



What is driving how much my consumers buy over time? - Brand Health - Value
 ALL SHOPPERS - AUS - TOTAL PISTACHIO - BASED ON VALUE (\$000'S)/1000



Source: Nielsen Homescan Australia (HIFVDHAL)



Demographics

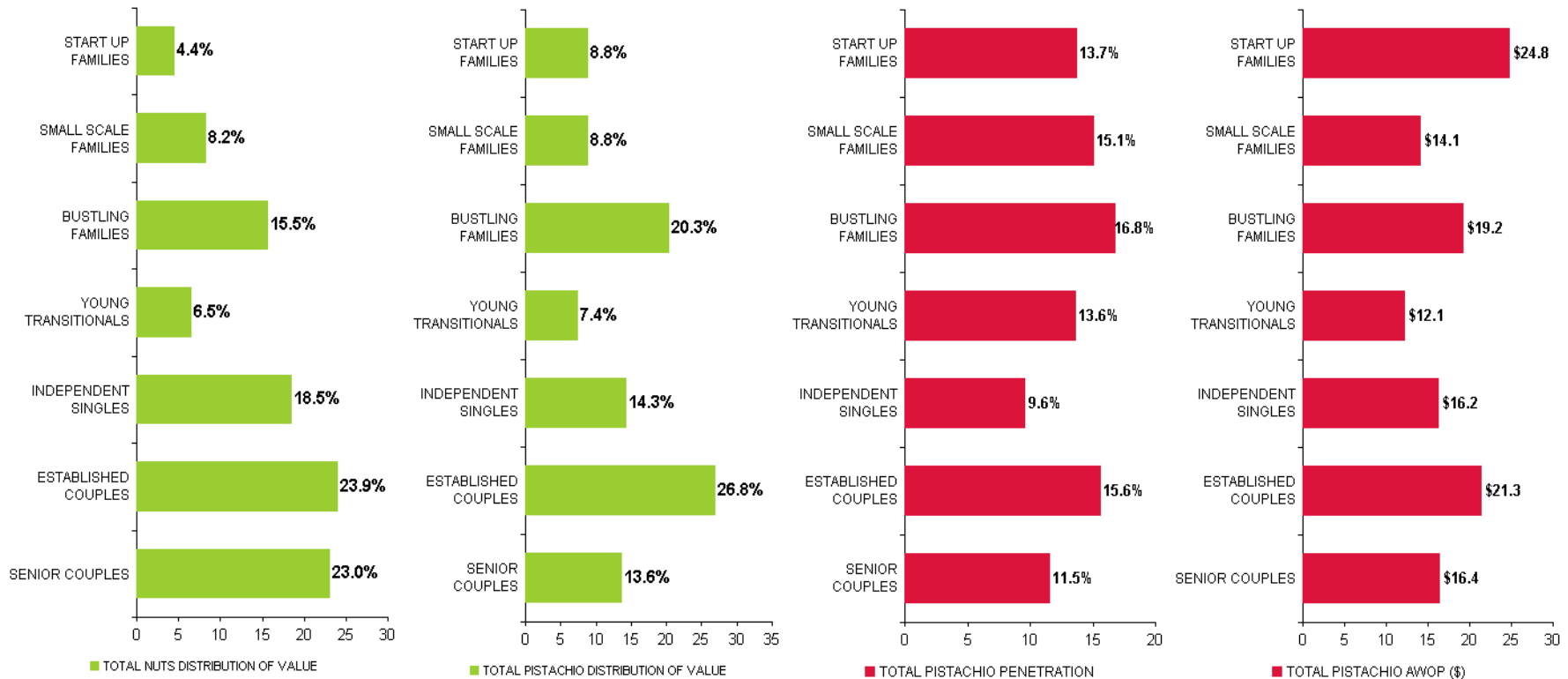
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Over the last year, Established Couples and Bustling Families have had the most significant contribution of around 50% to value sales of Pistachio; while Bustling Families over index for Pistachios, opportunity exists to develop Senior Couples.



Who buys my brand? (Lifestage) - Demographics - Value
 AUS - TOTAL PISTACHIO - MAT TO 14/05/2011 - BASED ON VALUE (\$000'S)/1000



Source: Nielsen Homescan Australia (HIFVDHAL)

Share of Trade

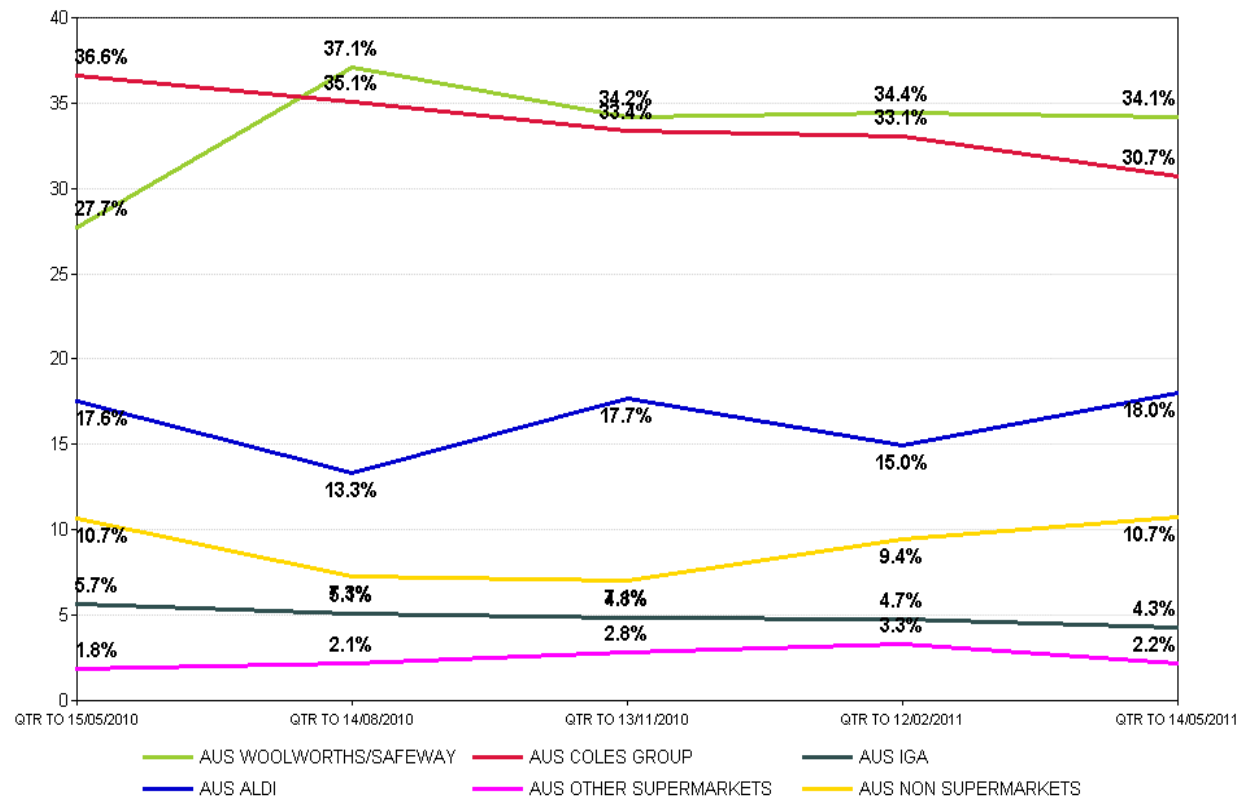
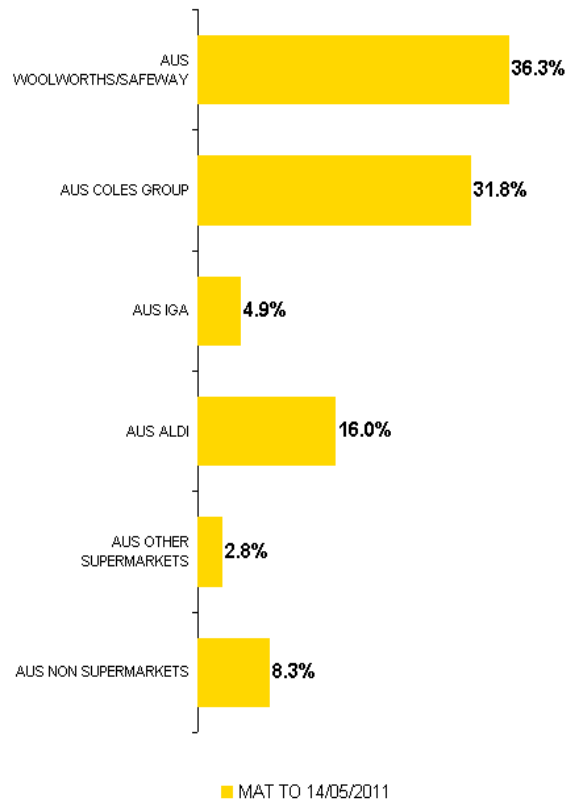
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While Woolworths has held a dominating share of Pistachio with 36.3% share, Pistachios are well developed in Coles however have seen significant decline in share of trade in the latest quarter.



What is driving grocery sales? (Account Comparison) - Bigger Picture - Value
 ALL SHOPPERS - TOTAL PISTACHIO - SHARE OF TRADE (\$)



Source: Nielsen Homescan Australia (HIFVDHAL)

Glossary

The Nielsen logo is a white circle containing the word "nielsen" in a lowercase, sans-serif font. Below the word are seven small dots arranged in a horizontal line.

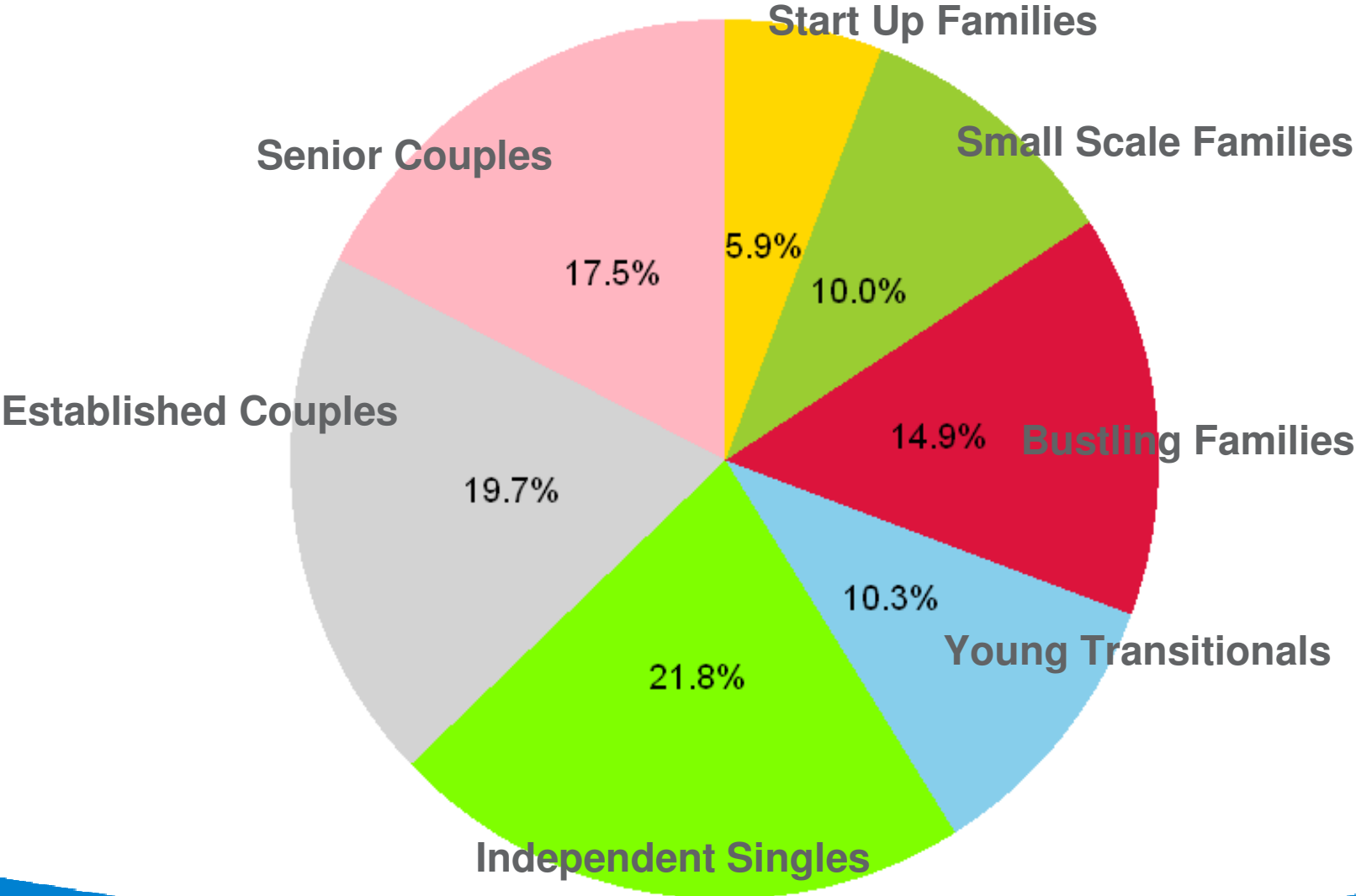
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Terms

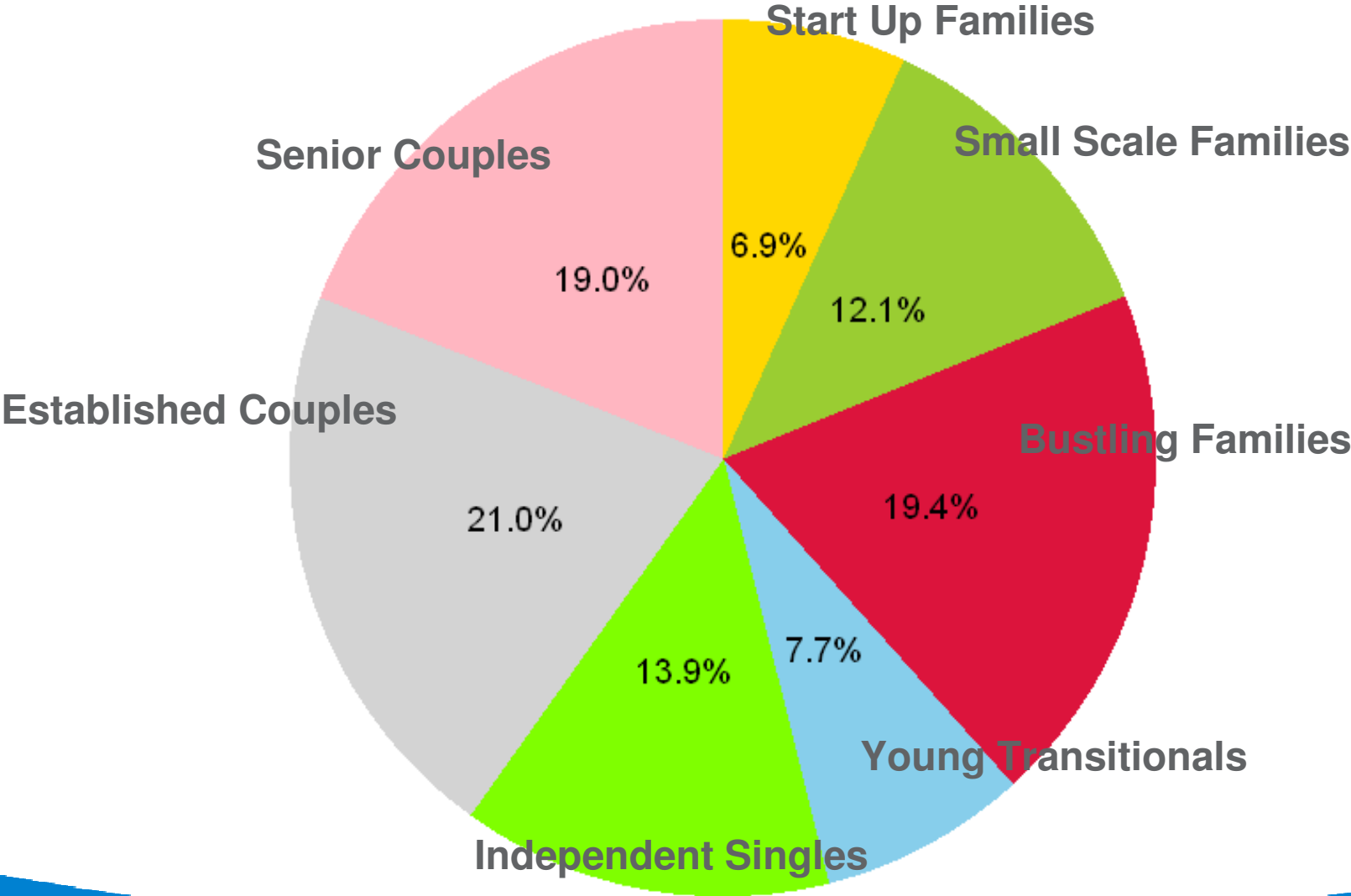


- **Penetration** – The proportion of households purchasing a product in the specified period expressed as a percentage of all households.
- **Average Weight of Purchase (AWOP)** – The average volume/value/units of a product bought across all buyers of that product in the specified period.
- **Occasions 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.

Distribution of Buyers Demographic Lifestages



Distribution of Value Demographic Lifestages



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 accustomed 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.

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