

<b>Consumption Trends</b>		
<b>2006</b>	<b>2010</b>	<b>2013</b>
<ul style="list-style-type: none"> <li>- 97% of the population consumes potatoes (53% consume potatoes at least 4 times a week)</li> <li>- Loyal consumers tend to be older couples ('classic providers' and 'old fashioned idealists')</li> <li>- Increasing consumption among 'experimental indulgers' which represent 13% of market.</li> <li>- Processed potatoes more popular among 'fun pragmatic parents' and 'quick solution seekers'</li> </ul>	<ul style="list-style-type: none"> <li>- 93% of population consume potatoes (44% consume potatoes at least 4 times a week)</li> <li>- The majority of Households are eating the same amount of potatoes as they did a year ago.</li> <li>- Classic Providers tend to be more motivated by ease and convenience.</li> <li>- Experimental Indulgents are always looking to try something new less likely to look for cost effective options.</li> </ul>	<ul style="list-style-type: none"> <li>- 94.5% of population consumes potatoes</li> <li>- 94% of households prepare fresh potatoes at least once a week.</li> <li>- Average consumption per capita (total popn.) 22.89kg</li> <li>- Core buyer is 55+ in a 1-2 person household without children.</li> <li>- Shoppers &lt;35 years less engaged with potatoes</li> </ul>
<b>Purchasing Trends</b>		
<b>2006</b>	<b>2010</b>	<b>2013</b>
<ul style="list-style-type: none"> <li>- \$88,346,000 million potatoes purchased annually.*</li> <li>- Potatoes purchased predominantly at supermarket rather than fruit &amp; vegetable shop</li> <li>- Fortnightly purchases of fresh potatoes, monthly purchases of processed potatoes</li> <li>- Visual appearance, purpose and price are selection drivers for consumers</li> </ul>	<ul style="list-style-type: none"> <li>- \$98,947,000 million potatoes purchased annually.*</li> <li>- Potatoes purchased predominantly at supermarket rather than fruit &amp; vegetable shop</li> <li>- Average household spend of \$55.40 on potatoes annually</li> <li>- 61% purchased bagged vs 39% loose potatoes</li> <li>- Purchase potatoes 12 times a year, average spend of \$4.60</li> </ul>	<ul style="list-style-type: none"> <li>- \$119 million fresh potatoes purchased annually.*</li> <li>- Potatoes purchased predominantly at supermarket (84% of value) rather than fruit &amp; vegetable shop</li> <li>- Average household spend \$51.63 on potatoes annually</li> <li>- 62% of spend on barcoded (bagged) vs 38% loose.</li> <li>- Purchase potatoes 11.5 times a year, average spend of \$4.49</li> <li>- Buying on promotion does not affect buying behaviour</li> </ul>
<b>Knowledge and Perceptions</b>		
<b>2006</b>	<b>2010</b>	<b>2013</b>
<ul style="list-style-type: none"> <li>- Perception that potatoes are not healthy (health concerns only one niche segment)</li> <li>- Growing competition around pasta and rice</li> <li>- Needing preparation, take longer to cook than alternatives</li> <li>- Frozen potato products are better value than fresh but perceived as unhealthy</li> </ul>	<ul style="list-style-type: none"> <li>- Health and nutrition a factor in purchasing decisions of two segments</li> <li>- 52% dissatisfied with labelling around loose potatoes</li> <li>- 73% respondents said potatoes were versatile</li> <li>- 98% respondents were aware that some potato varieties have specific cooking purpose.</li> <li>- 66% respondents tried new potato recipe once or twice a year</li> <li>- 53% respondents said potatoes were healthy (5% said potatoes were unhealthy)</li> </ul>	<ul style="list-style-type: none"> <li>- Potatoes seen as extravagant and difficult to prepare by under 35 years</li> <li>- Under 35years lack relevant potato "occasions"</li> <li>- 60% respondents aware of varieties</li> <li>- 34% respondents want more recipes</li> <li>- 20% respondents want more information on health benefits.</li> <li>- 25% of respondents that increased consumption of potatoes did so because of health benefits</li> </ul>