



PROJECT SMASH

DEVELOPING A UNIQUE SELLING PROPOSITION
FOR AUSTRALIAN AVOCADOS IN SE ASIA › JUN 2021

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SECTION 1

BACKGROUND, OBJECTIVES & METHODOLOGY

**THE GLOBAL FRESH
FOOD CONSUMER,
CATEGORY AND
CULTURAL LANDSCAPE
IS EVOLVING-
PARTICULARLY IN ASIA,
WHERE SHIFTING
ATTITUDES AND
BEHAVIOURS ARE
OPENING UP NEW
OPPORTUNITIES.**

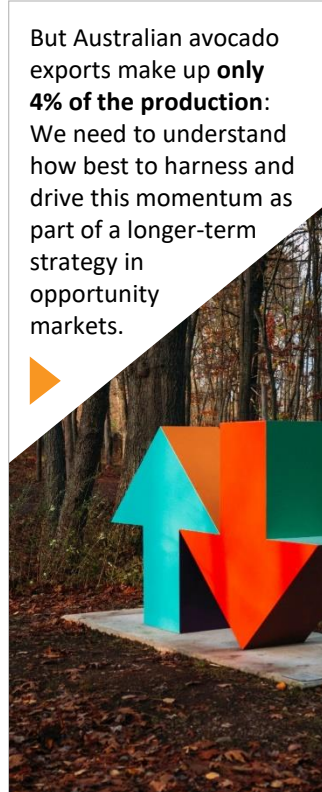


FOR AUSTRALIAN AVOCADOS SPECIFICALLY, THERE ARE MANY KEY INFLUENCES WHICH UNDERPIN THE NEED TO EXPLORE AND UNDERSTAND



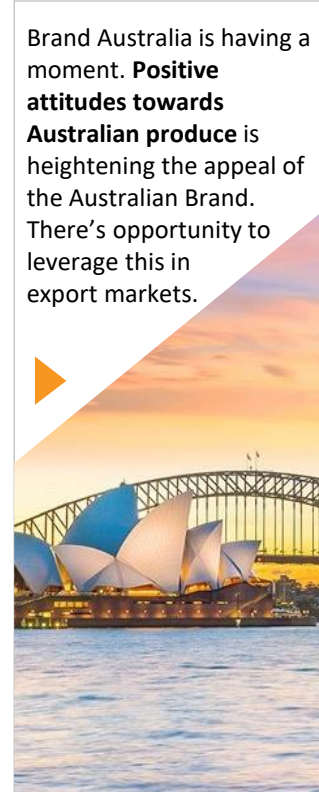
▶ The Australian avocado **industry is currently in a period of strong growth**. Demand for avocados is high and domestic and international supply have been increasing to try and keep up.

But Australian avocado exports make up **only 4% of the production**: We need to understand how best to harness and drive this momentum as part of a longer-term strategy in opportunity markets.

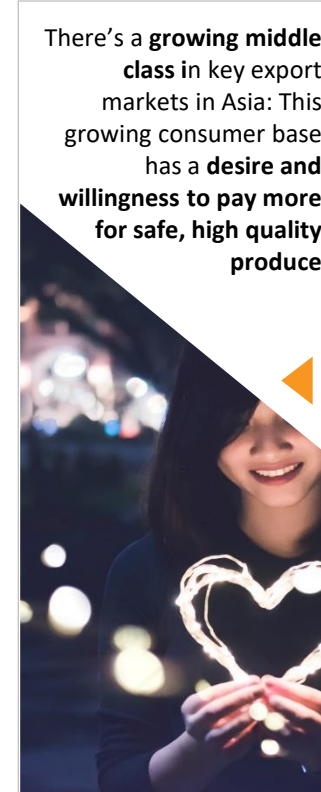


▶ SE Asian consumers' **food preferences are evolving** & they're excited and inspired by foods from around the world, and **placing increasing value on provenance**, presenting a perfect platform for Australian avocados.

Brand Australia is having a moment. **Positive attitudes towards Australian produce** is heightening the appeal of the Australian Brand. There's opportunity to leverage this in export markets.



There's a **growing middle class** in key export markets in Asia: This growing consumer base has a **desire and willingness to pay more for safe, high quality produce**



TASTE AUSTRALIA



▶ The Taste Australia brand has **been effective** in engaging global consumers, with emotive messaging that has created a compelling, premium positioning for other fresh foods. We need to build on this success.



THE BUSINESS NEED

To develop a deeper understanding of the avocado consumer in key export markets that can be used to identify key targets and growth opportunities and develop a compelling USP and positioning to add genuine value, and underpin marketing communication and innovation.

RESEARCH IS REQUIRED TO EFFECTIVELY UNLOCK THIS OPPORTUNITY BY IDENTIFYING:

- 1) Where does opportunity for growth lie within the avocado category in key export markets?
- 2) How do we access this growth opportunity?



UNDERSTAND

Understand who are the core target consumers, why do they/don't they consume avocados and how do we unlock growth opportunities?

DEFINE

Define our USP in key export markets. And what are the core elements of an Australian avocado positioning that will drive volume and value?

IDENTIFY

Identify the big strategic drivers we should focus on to unlock growth and ensure maximum engagement?



RESEARCH OBJECTIVES

KNOW OUR CUSTOMERS

Understand the **attitudes, behaviours** & **needs** of consumers in key export markets

Map and understand consumer **pain points**

Understand shopping **occasions** and their **triggers**

Explore the decision making **process** for fresh food, and specifically avocados

IDENTIFY PRIORITIES

Identify different customer **segments** based on customer **attitudes and behaviours**

Identify different customer **occasions** based on **needstates and triggers**

Determine **differences** between segments and occasions based on demographics, brand health, and behaviour

Determine key **drivers** of **consideration** and choice

OPTIMISE THE PROPOSITION

Determine Australian Avocado's **credibility** and **consideration** in priority opportunity spaces

Determine the **optimal CVP** that will drive consideration & purchase for Australian Avocados

Determine the **optimal positioning territory** that will resonate with priority opportunities

SUCCESSFULLY EXECUTE

Identify any **product/brand perceptions or barriers** that need to be overcome

Determine how to **best present partners** and curate their offers, e.g. deals, menus, etc.

Understand how this will **impact behaviour** against established **competitors** / brand **preference**

UNLOCKING THE OPPORTUNITY: RESEARCH APPROACH

01 IGNITE

A preliminary stage to set the project up for success and craft positioning territories

KICK-OFF WORKSHOP
AND STAKEHOLDER
INTERVIEWS

02 ILLUMINATE

An innovative, digital qualitative approach to fully understand consumer attitudes, behaviours, and pain points in each category

5-DAY ONLINE
COMMUNITIES IN
SINGAPORE, MALAYSIA
& JAPAN

03 CREATE

Utilising proven frameworks to create a series of draft positioning territories and potential USPs which are shared as part of a comprehensive Qualitative debrief.

QUALITATIVE INSIGHT
DEBRIEF AND A
CONCEPT CLINIC TO
CREATE POSITIONING
TERRITORIES

04 MEASURE

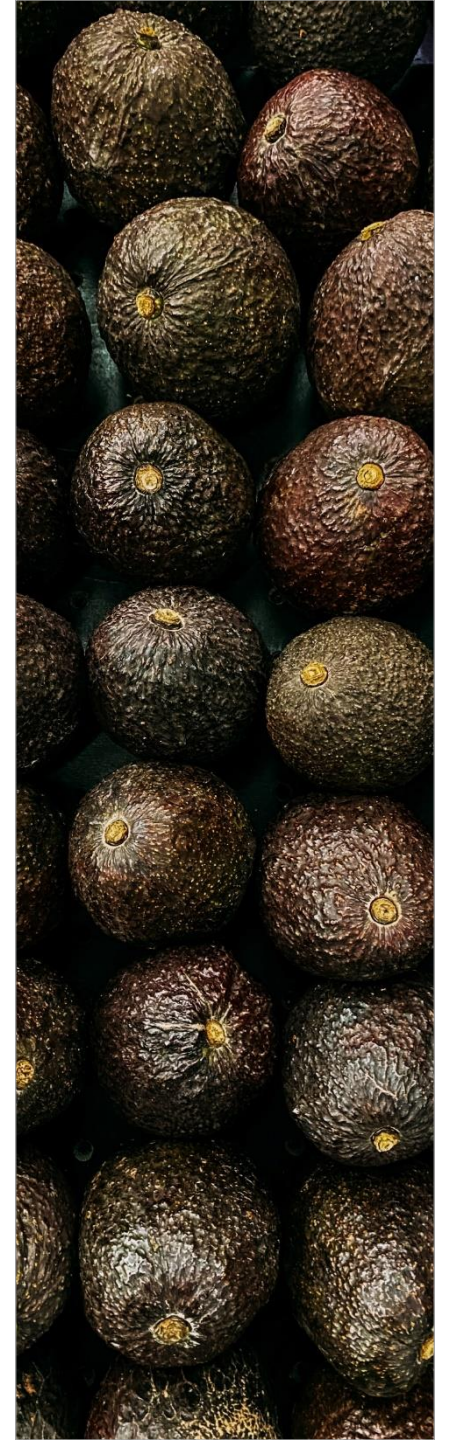
A comprehensive online survey of attitudes and behaviours to build a segmentation in each category, followed by an evaluation of our positioning territories

A 25 MINUTE ONLINE
SURVEY IN SINGAPORE,
MALAYSIA
& JAPAN

05 DELIVER

A strategic workshop to help you prioritise opportunities and map out the go-to-market strategy

A STRATEGIC DEBRIEF
WORKSHOP



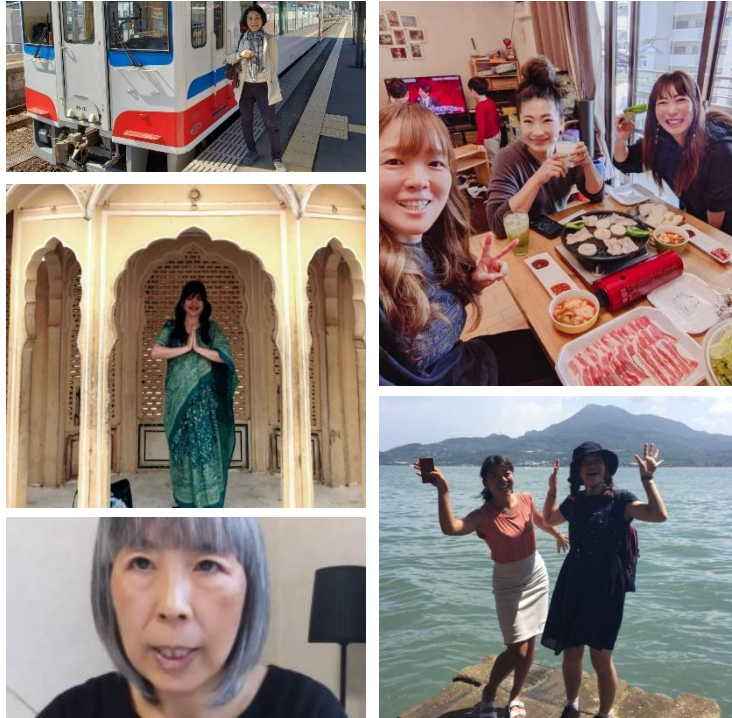
SECTION 1

SAMPLE & QUESTIONNAIRE DESIGN

QUALITATIVE SAMPLE: 5 DAY ONLINE COMMUNITY, WITH 15 PARTICIPANTS PER MARKET, ACROSS MALAYSIA, SINGAPORE AND JAPAN DURING MAY 2021



JAPAN



SINGAPORE



MALAYSIA



- All aged 25-65, mix of lifestage (e.g. Singles, Families)
- All based in a Metro location in relevant market
- Skewing towards high socio-economic status
- Mix of avocado purchase frequency (high, med, low/ no)

QUALITATIVE SAMPLE: 5 DAY ONLINE COMMUNITY, WITH 15 PARTICIPANTS PER MARKET, ACROSS MALAYSIA, SINGAPORE AND JAPAN DURING MAY 2021

VARIETY OF DAILY ACTIVITIES AND TASKS

ONLINE COMMUNITY ACTIVITY GUIDE

	Day 1	Day 2	Day 3	Day 4	Day 5
Topic	Introductions	Avocados	Buying Avocados	Australian Avocados	Eating Avocados
Objective	Welcome participants and get to know a bit about them	Understand perceptions & associations of avocados including positives and negatives	Gain insight into purchase behaviour & experience as well as unpacking the decision process	Explore perceptions of Australian produce to understand the potential opportunity	Explore how consumers currently eat avocados
Questions/ tasks	- Tell us a bit about you & your life right now - What's your motto/ philosophy in life? - Pantry tour - Tell us about your favourite food right now, and what it is that you like about it	- What words would you use to describe an avocado? - What makes a good avocado? - Imagine you are writing a letter to an alien who has never heard of, or seen, an avocado. What would you tell them? - How much do you know about where avocados come from? How important is that?	- How often do you buy avocados? - Where do you buy them from? And why there in particular? - How do you choose which avocados to buy? <i>Next time you are in store, record a video/ take photos of the avocados and tell us a bit about what the shopping experience is like.</i>	- Create a collage that sums up how you feel about products from Australia - What associations do you have with Australia? - What do you know about Australian avocados? - What might make avocados from Australia different/ special & why?	- How often do you eat avocados? - How do you like to prepare avocados? - Record a video telling us your top 3 ways to eat avocados and why? - Where do you store your avocados? - If suddenly all the avocados vanished, and you could no longer have them, how would you feel?
Will input USP by...	PROVIDING THE BROADER CONTEXT OF FOOD IN THEIR LIFE	UNDERSTANDING CURRENT PERCEPTIONS OF AVOCADOS AND JOBS TO BE DONE	IDENTIFYING DRIVERS AND BARRIERS OF PURCHASE	INDICATION OF WHERE WE CAN WIN VS. COMPETITORS	UNDERSTANDING OCCASIONS, NEEDS, MOTIVATIONS & PAIN POINTS

fiftyfive5

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SAMPLE: 15 CONSUMERS PER MARKET

- All aged 25-65
- Mix of lifestage (e.g. Singles, Families)
- All based in a Metro location in relevant market
- Skewing towards high socio-economic status
- All to be main/ joint decision maker on fresh foods bought for the household
- Mix of avocado purchase frequency (high, med, low/ no)
 - All low/ no consumers to be open to purchasing avocados in the future (non-rejectors)
- Mix of household consumption of avocados- e.g. self, partner, kids, everyone
- All intending to visit a grocery store/ fresh food market (wherever they usually shop) during the fieldwork period

QUANTITATIVE SAMPLE:

N=1000 CONSUMERS PER MARKET (MALAYSIA, SINGAPORE AND JAPAN)



**25 minute
Online survey**



**Nationally
representative on entry**



Sample size of n=1000



**All aged
18 to 65 years**



**All are main or joint
grocery buyers**



**Purchase grocery at
least fortnightly**



**Purchased avocados
in the past 6 months**



**All are non-rejectors of
avocados**

QUANTITATIVE SURVEY FLOW

SCREENER	3 MINS	To determine eligibility for the survey and general profile	• Age • Gender • Lifestage • Location • Avocado purchase penetration/frequency
SECTION A: PURCHASE AND CONSUMPTION BEHAVIOUR	5 MINS	To determine relevant behaviours and size the opportunity	• Grocery purchase channel and spend • Avocado spend and volume • Avocado consumption frequency • Avocado meal occasions • Avocado origin • Avocado quality across importer countries • Pain points in buying avocados
SECTION B: ANSWERING THE 5Ws	6 MINS	Understand avocado usage (Who, When, What, Why, Where)	• Who consumes avocados • How are avocados consumed • Where are avocados consumed • Why are avocados consumed • What are avocados associated with
SECTION C: DRIVERS OF CHOICE AND ATTITUDES TOWARDS AVOCADOS	4 MINS	To determine the key needs of customers considering avocados	• Factors that drive purchase of avocados • Choice drivers association across importer countries • Health benefits • General attitudes towards food and health
SECTION D: TERRITORY EVALUATION	4 MINS	To determine which positioning territory might best drive consideration	• Random allocation of two positioning territories • Series of evaluation measures, e.g. appeal, purchase likelihood, credibility, uniqueness, fit to brand • Forced choice appeal
SECTION Z: DEMOGRAPHICS	3 MINS	Further profiling information	• Income • Occupation • Employment status

SECTION 2

QUALITATIVE FINDINGS

A close-up photograph of a hand holding a halved avocado. The green flesh and dark skin of the avocado are visible, with the large pit in the center. The background is blurred, showing more of the avocado and the hand.

**CULTURAL
CONTEXT**

**AVOCADOS IN
ASIA**

**COUNTRY OF
ORIGIN**

**POSITIONING
TERRITORIES**



THESE MARKETS ARE ALL RELIANT (TO A DEGREE) ON IMPORTS

It's a fact of life that food will often come from overseas (especially in Singapore, where only 7% of food is grown locally), and consumers have become well accustomed to buying food imported from around the world.

For many *where* their food specifically comes from is rarely a top of mind consideration.



OUR THREE MARKETS ARE HIGHLY DIVERSE

	MALAYSIA	SINGAPORE	JAPAN
SIZE	329,847 km ²	728.3 km ²	377,975 km ²
POPULATION	31.95 million	5.704 million	126.3 million
GDP/ CAPITA	11,414.21 USD	65,233 USD	40,246 USD
DISTANCE FROM AU	4,743km	4,374km	6,848km

FIVE THINGS YOU SHOULD KNOW ABOUT JAPAN



1

JAPANESE CONSUMERS CRAVE REASSURANCE THEY ARE DOING THINGS CORRECTLY

There is huge cultural emphasis on doing things the 'right' way. Consumers crave detailed information and can be slow to adopt new things for fear of getting it wrong.

The wine market is a perfect example of this. Only with more recent focus on consumer education & confidence has the category started to grow in Japan.

2

THE CONCEPT OF AESTHETICS IN JAPAN IS SEEN AS AN INTEGRAL PART OF DAILY LIFE

This ideal underpins much of Japanese cultural and aesthetic norms on what is considered tasteful or beautiful.

This especially applies to food & diet. Many Japanese consumers pursue 'healthy' foods in an effort to be thin & beautiful, and restrict/avoid foods that are believed to be high in fat or calories.

3

BALANCE AND SEASONALITY ARE CORE TO JAPANESE FOOD CULTURE

Shun refers to the idea of eating seasonally when foods are at their freshest and most flavorful. Consumers actively seek to match with the natural rhythms of seasons.

Looking for green & yellow vegetables 緑黄色野菜 (ryokuoshoku yasai) is an especially important part of this due to their perceived high nutritional qualities.

4

JAPANESE CONSUMERS HAVE A MIXED RELATIONSHIP WITH AVOCADOS

Highly praised for its strong functional benefits- including nutrition & beauty BUT some concern for high calories- particularly given beauty ideals.

Usage is relatively wide & varied, but consumers will stick to dishes & occasions they are confident with.

A key barrier is how to choose- anxiety is felt around getting the ripeness right.

5

JAPANESE GROCERY STORES HAVE HIGHLY SOPHISTICATED AVOCADO DISPLAYS

Japanese stores appear to be going to great lengths to help consumers choose 'the right' avocado.

Providing guidance around ripeness (signage & scales to help understand colour/ firmness), including inspirational recipes and even high levels of detail around provenance-related benefits on packaging can be seen.

FIVE THINGS YOU SHOULD KNOW ABOUT SINGAPORE



1

THE SINGAPOREAN GOVERNMENT IS GAMIFYING HEALTH

The government is currently incentivising Singaporeans to live a more active and healthy life.

Tangible rewards are offered to consumers to encourage healthy habits such as free fitbits and shopping vouchers in exchange for hitting daily step counts. 'Healthy Choice Symbols' in supermarkets are also helping consumers to make healthier choices.

2

IMPORTS MARKETS ARE ALSO BEGINNING TO DIVERSIFY

The fallout from COVID-19 over the last 12 months has led the government to consider diversifying their trade relationships & practices.

Historically AU, NZ and the USA were key import markets, however they're now looking elsewhere in a bid to create greater food security and for the first time consumers are seeing more products from the rest of the world.

3

GROCERY SHOPPING CAN BE VERY EXPENSIVE IN SINGAPORE

Only 7% of Singapore's food is grown locally- the rest is imported from around the world. This has created higher food prices- and so consumers are often on the look out for a deal or promotion.

Their grocery habits can reflect this, as they take advantage of a low prices- especially on foods which are typically more expensive (such as avocados)

4

AVOCADOS ARE WIDELY SEEN AS A SUPERFOOD- BUT VERY EXPENSIVE

They're seen as a premium fruit, full of excellent nutritional qualities (and advised as a healthy choice by the government) but very tricky to get right.

With it's high cost, and a lack of familiarity with how to choose an avocado, when to eat it, and *how* to eat it, it can be a very expensive mistake if they get things wrong.

5

AVOCADOS ARE CONSUMED IN RELATIVELY SIMPLE WAYS

Whilst most home-made meals are grounded in Asian cuisine, consumers are using avocados in typically Western dishes e.g. salads, spreading on toast or blending into dips or smoothies/ shakes.

Many have seen avocados used in these ways during overseas travel (e.g. to Australia) and so look to recreate food they know will work.

FIVE THINGS YOU SHOULD KNOW ABOUT MALAYSIA



1

MALAYSIA IS A TRULY MULTI-CULTURAL COUNTRY WITH A MELTING POT OF INFLUENCES

With a core population comprising of Chinese, Malay and Indian heritage- as well as a multitude of people from other nationalities & religious backgrounds- Malaysia has a rich and vibrant culture, heavily influenced by the diversity of the people who live there.

2

A STRONG SOCIAL HEIRARCHY EXISTS THAT DICTATES MANY FACETS OF LIFE

Social status and class are defining pillars of Malaysian life. Outward symbols of class are key- for many it's more important to have the latest car than a home. How and what higher class consumers buy is often followed in the image of the Malay royalty with luxury clothes, expensive jewelry, and cars. It's important that others can see your status.

3

LIFESTYLE-RELATED HEALTH CONDITIONS ARE ON THE RISE, CONSUMERS ARE LOOKING FOR A FIX

There's an increasing focus on health amongst consumers, particularly as rates of high cholesterol and diabetes remain high.

Keto diets and intermittent fasting are being adopted as ways to lose weight and be more healthy (with avocados playing a key role), but for many this is more of a short-term fix than a lifestyle overhaul

4

DESPITE HAVING LOW KNOWLEDGE , MALAYSIANS ARE EXPERIMENTING WITH AVOCADOS

There's poor consumer understanding of avocados, beyond the notion that they are 'healthy' and low carb.

They're very expensive, and most struggle with choice in store (and have little to no guidance), but once at home they're using avocados in a myriad of ways and seeing what works.

5

OF ALL OUR MARKETS, FOOD SAFETY & CLEANLINESS IS MOST IMPORTANT IN MALAYSIA

Consumers are increasingly selective in food purchasing due to concerns over food safety, cleanliness, and nutrition.

High rates of food poisoning (especially from night markets) had made consumers wary, and they look for reassurance of a products safety via labelling, branding and preference for Halal foods/ foods from Muslim countries.

A close-up photograph of a hand holding a sliced avocado. The avocado is cut lengthwise, revealing the green flesh and the large, dark brown pit. The hand is positioned in the center, with fingers visible on the left and right sides. The background is blurred, showing more of the avocado and the hand.

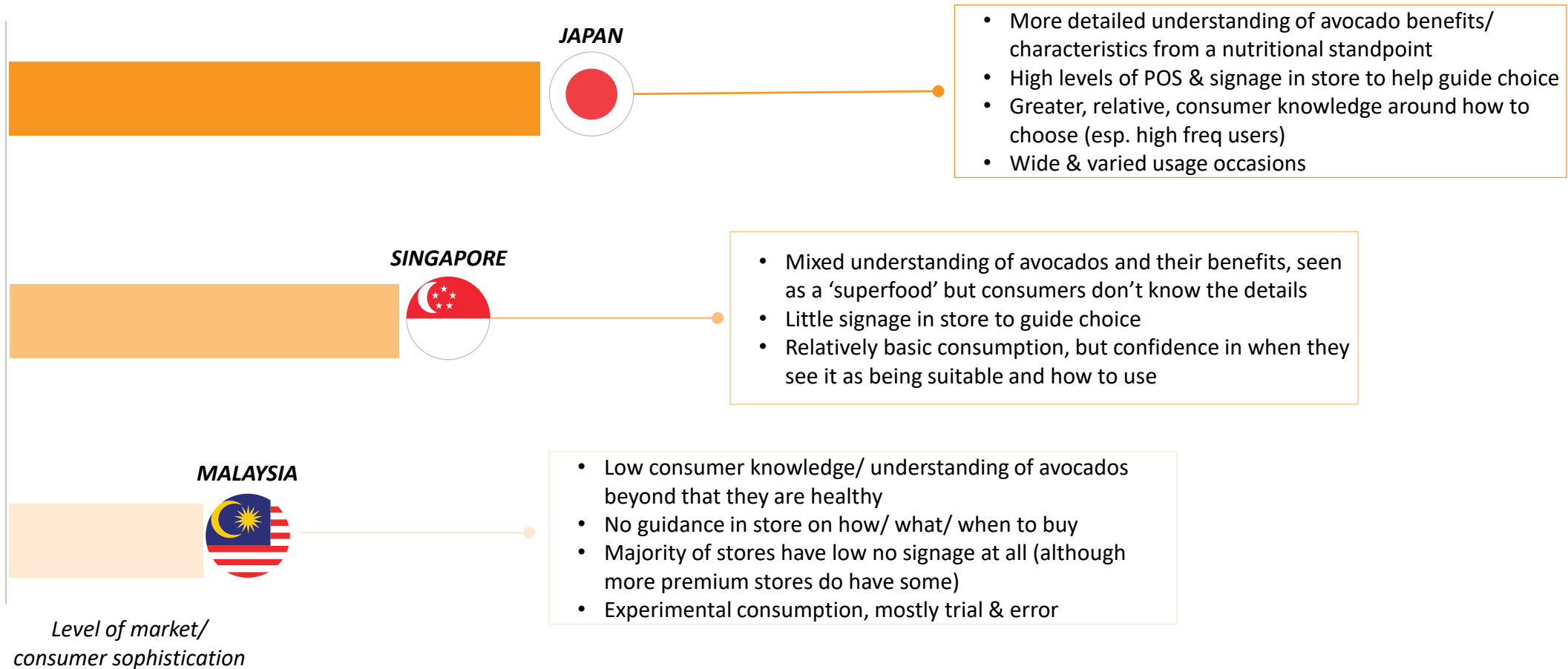
**CULTURAL
CONTEXT**

**AVOCADOS IN
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THIS DIVERSITY IS ALSO SEEN IN HOW EACH MARKET SEES, USES & BUYS AVOCADOS. THERE'S VARYING LEVELS OF MARKET/ CONSUMER SOPHISTICATION



WHILST SMALL, INDIVIDUAL MARKET NUANCES DO EXIST, THERE'S GENERALLY A SET OF UNIVERSAL ASSOCIATIONS WITH AVOCADOS- SIMILAR TO THOSE IN AUSTRALIA



Avocados are bursting with goodness. Vitamin E, good for the skin, fibre, healthy oils and fats- it really has so much packed into one little vegetable, and the taste is so unique.

HIGH FREQUENCY CONSUMER, SINGAPORE

ONE THE ONE HAND ✓

HIGHLY NUTRITIOUS

A superfood that's full of important functional benefits- vitamins, fibre, 'good' fats

UNIQUE TASTE

Soft creamy texture, with a buttery taste and unique mouthfeel

VERSATILE

(high freq users)

Ability to use across a range of different meal types & occasions- including sweet & savoury

EXPENSIVE

Far more costly than other fruit/ veg

HARD TO CHOOSE

Very hard to pick the right avocado and get the ripeness right- a potentially very expensive mistake

HIGH CALORIE/ FAT

The only fruit/ vegetable you can have too much of

BLAND ON IT'S OWN

Boring taste that always requires seasoning

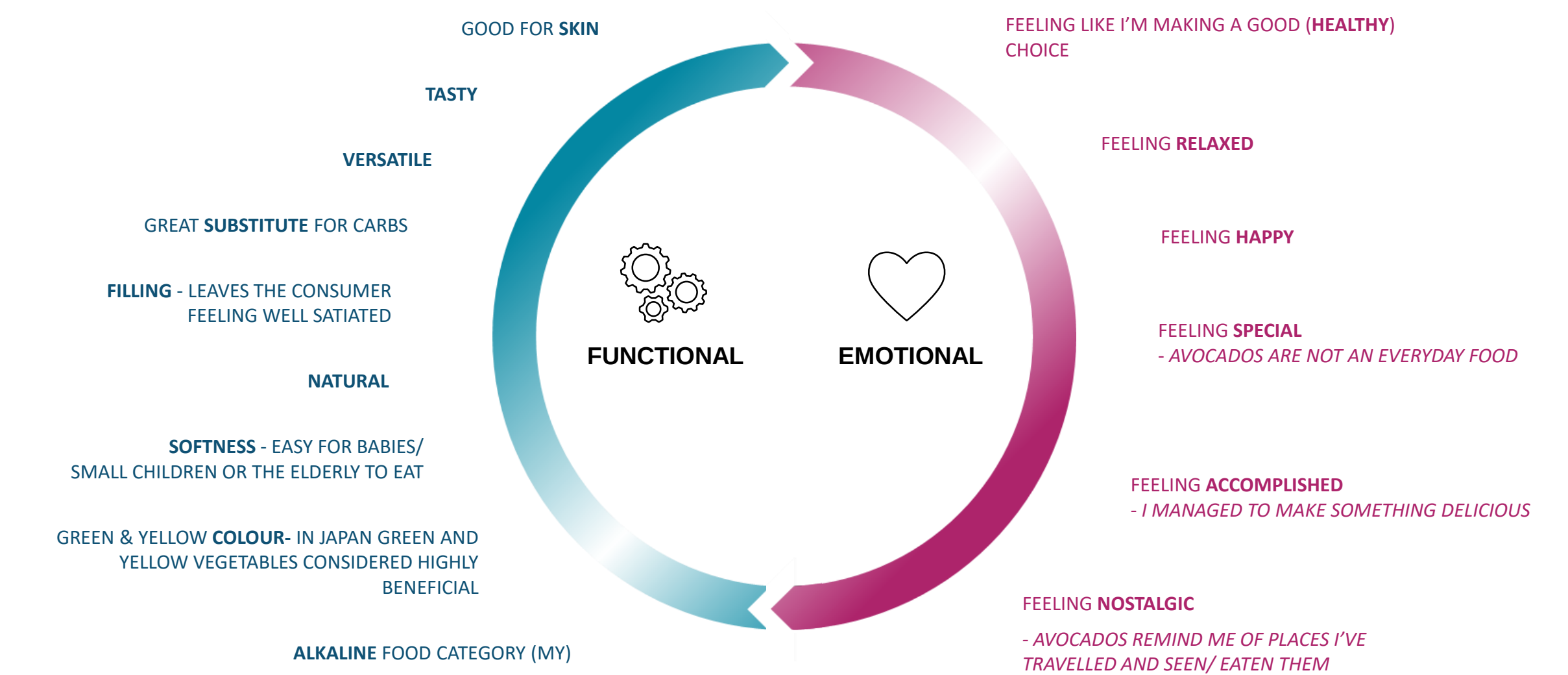
HOWEVER ✗

I am not an expert in choosing avocados. I look at the colour and firmness but still I get home and find they are brown and not suitable to eat. It's a shame.

MEDIUM FREQUENCY CONSUMER, MALAYSIA



BEYOND HEALTH, A RANGE OF OTHER FUNCTIONAL AND EMOTIONAL BENEFITS ARE ASSOCIATED WITH EATING AVOCADOS



HOWEVER, DESPITE THE ASSOCIATED BENEFITS A RANGE OF CONSUMER PAIN POINTS EXIST WHICH CREATE A BARRIER TO PURCHASE FOR MANY

THESE PAIN POINTS ALSO ECHO SIMILAR SENTIMENT HEARD FROM AUSTRALIAN CONSUMERS

PERCEPTUAL

AVOCADOS ARE EXPENSIVE

Avocados are an expensive product in these markets, and potentially a high risk purchase if the avocados they choose are damaged or under/ over ripe.



AVOCADOS ARE HIGH IN CALORIES AND FAT (esp. JP & MY)

Whilst some see these as 'good fats' and permissible calories, for other's it's a barrier to increased usage- and something to be wary of when using avocado

It is hard to ensure that the food is ripe just by looking at the exterior of it. I don't like, and I don't like others to poke or press... but somehow it is the best and maybe only way to ensure the avocado is nice and yummy

HIGH FREQUENCY USER, SINGAPORE

CHOICE/ REASSURANCE

IT'S HARD TO CHOOSE THE 'RIGHT' AVOCADO

Whilst more knowledgeable/ higher frequency users of avocados have developed a range of tools and strategies to help ensure they're picking the perfect avocado, many consumers (esp. in SG and MY) struggle and each purchase becomes a case of trial and error. Some are also reluctant to touch/ press avocados to help with their choice

AVOCADOS ARE INCONSISTENT

Even if they think they've done anything right, consumers can still be disappointed when they cut into it. It may be under ripe, or over-ripe or it may be bruised and damaged. Consumers can be left thinking that they are simply not worth the effort/ cost

INSPIRATION/ USAGE

IT'S HARD TO KNOW HOW TO USE AVOCADOS CORRECTLY

A large barrier for low/ non users is around confidence in how to best use avocados. Those who are more familiar and experienced often have their own set preference on how to use, but many are still looking for inspiration and ideas.



THERE'S A LOT OF WASTE WHEN USING AVOCADOS (esp. JP)

Eating a whole avocado in one go can be difficult, especially for young singles- however this can mean the remainder is often wasted as once the flesh turns brown consumers don't want to eat it. Some prefer to buy frozen avocado to help overcome this

AVOCADOS DON'T TASTE VERY GOOD ON THEIR OWN

A barrier for those with a weaker relationship with avocados is their neutral/ bland taste, especially for those who are looking for strong, flavourful foods- they're not sure how best to season, incorporate avocados to maximise the taste.



GROCERY SHOPPING HABITS ARE FAIRLY SIMILAR ACROSS ALL OF OUR MARKETS

SHOPPING NORMS

- **24/7 Hypermarkets and local supermarkets** lead the way for grocery shopping where consumers have easy access to a huge range of products
- **Local markets/ wet markets** are also a key channel- especially for low prices, niche items & perceived freshness, but they're often only accessible on specific days/ at specific times

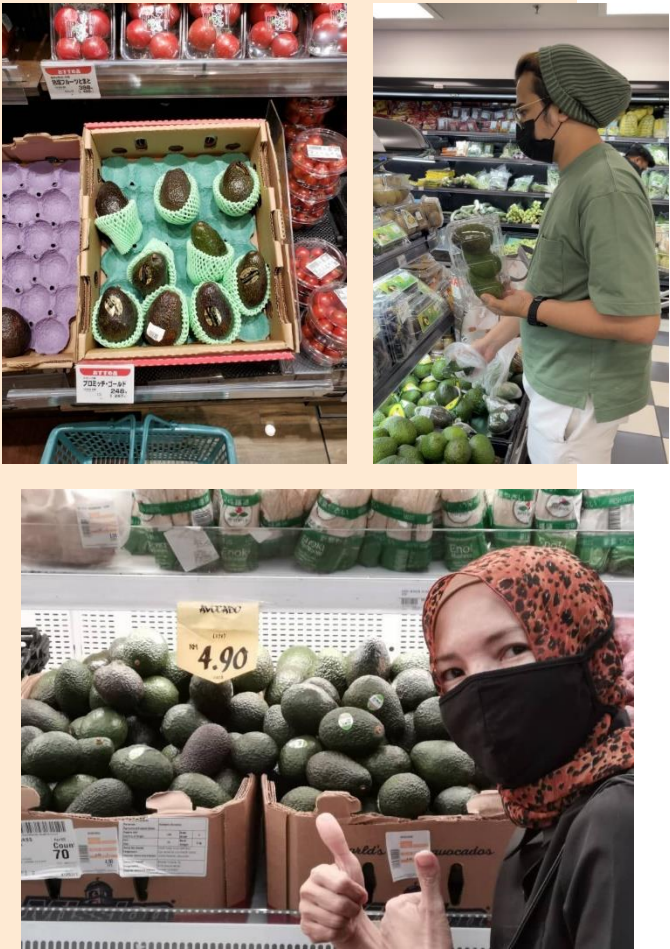
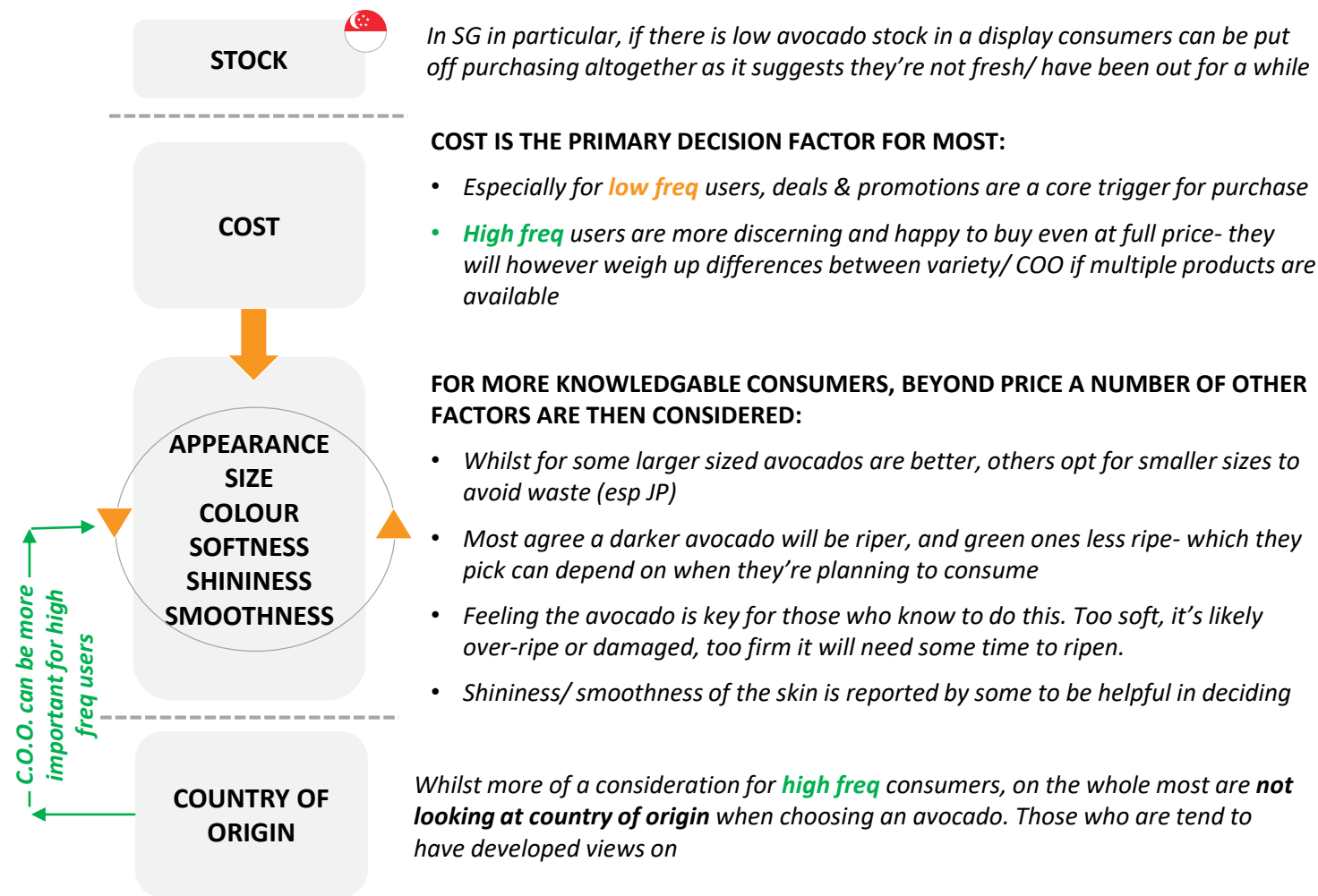
SHOPPING OCCASIONS

- Most consumers (esp those with families) are in the habit of routine **weekly/ fortnightly shops**
- SINK/DINKs are more likely to be shopping more often. They have smaller homes, with smaller kitchens & fridges which means **a higher number of smaller shops**

TRIGGERS TO AVOCADO PURCHASE

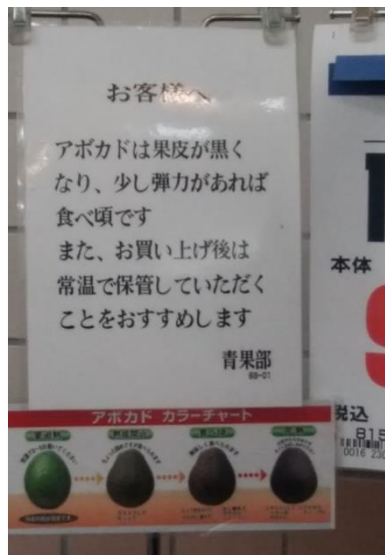
- Largely **price driven**, a good promotion/ deal makes avocados less of a risk to buy than when they are full price
- For **high freq** users avocados are a part of their **typical grocery shop**
- Some **low freq** users are triggered by **WOM/ social media** posts involving avocado recipes

THE DECISION MAKING PROCESS CAN VARY DEPENDING ON THE CONSUMER KNOWLEDGE & EXPERIENCE WITH AVOCADOS. FOR MANY IT'S JUST ABOUT PRICE.



JAPANESE STORES APPEAR TO BE GOING TO GREAT LENGTHS TO TRY AND COMBAT CONSUMER PAIN POINTS AND HELPING TO GUIDE CONSUMERS [1/2]

RIPENESS GUIDES IN STORE



Dear customers,

Avocado is perfectly ripe to eat when its skin turns black and moderately elastic. We also recommend storing your avocados at room temperature after purchase.

Fruit & vegetable department



How to tell when the avocado is ripe!

Skin of avocado turns black when it's ripe.

Ripeness color-chart:
harvest / after-ripening / after-ripening / ripe
Tips to after-ripe avocados...
Tips to slice avocados nicely...

USAGE INSPIRATION & RECIPES



This combination is a LIKE!
Walnut-Avocado honey mustard salad

Your salad turns stylish just by using raw walnuts!!
Fresh raw walnuts with genuine taste of California.



Avocado Gratin
Easy, no dish needed!

Ingredients: 1 avocado, 1/2 potato, 1 tuna can, 1 onion, white sauce (100cc), salt & pepper (moderate amount), 1 cheese slice, parsley (moderate amount)

Recipe: 1) Cut avocado in half, take out the seed, and cut the top half into dices, 2) Wrap 1/2 potato and microwave for 2min, 3) pour out oil from the tuna can and flake it, 4) mix 1-3 with onion and white sauce and season with salt & pepper, 5) put 4 inside the avocado and place cheese over it, 6) heat in oven until golden then put parsley to finish.

JAPANESE STORES APPEAR TO BE GOING TO GREAT LENGTHS TO TRY AND COMBAT CONSUMER PAIN POINTS AND HELPING TO GUIDE CONSUMERS [2/2]

PROVENANCE & TASTE



MEXICO AVOCADO

Mexican-made Avocado
With easy recipes (see backside)
Rich, creamy, and melts in your mouth



Thick & melty avocado

Kept on tree for a long time to ripen. This avocado has a high oil content and is rich in flavor.



Patented #6116012

The cultivation method of this avocado is registered with the Patent Office.



A top pick product – kept on tree for a longer time to ripen!

High in oil and rich tasting with smooth, melting texture.
Mexico-made melty avocados.

WHILST C.O.O. IS HIGHLIGHTED ON PACK IN SOME INSTANCES IN JAPAN, CONSUMERS TELL US THAT THIS IS NOT SOMETHING THEY ARE PAYING MUCH ATTENTION TO AT PRESENT WHEN CHOOSING THEIR AVOCADO BECAUSE THE ASSUMPTION FOR MANY IS THAT ALL AVOCADOS ARE FROM MEXICO



IN SINGAPORE, MOST AVOCADOS ARE DISPLAYED IN SIMPLE BOXES/ CRATES/ ON SHELVES, HOWEVER MORE PREMIUM AVOCADOS HAVE ADDITIONAL PACK ELEMENTS





IN MALAYSIA THERE'S A WIDE RANGE OF DIVERSITY IN AVOCADO DISPLAY DEPENDING ON WHERE THE CONSUMER IS SHOPPING

BASIC/ LOWER END SUPERMARKET



- Bottom shelf
- No clear signage or labelling (avocado written in pen)

- In original shipping box
- C.O.O. is inadvertently displayed

It was hard to find the avocados at first as they were right down on the bottom of the shelf and there wasn't a clear label.

MED FREQUENCY USER, MALAYSIA

MID TIER SUPERMARKET



- Generally only one type of avocado available to purchase
- Produce emptied into containers
- Promotions available

Today there was a promotion! I always look out for deals, they're too expensive to buy otherwise. But buy 1 get 1 free is ok for 4.99

HIGH FREQUENCY USER, MALAYSIA

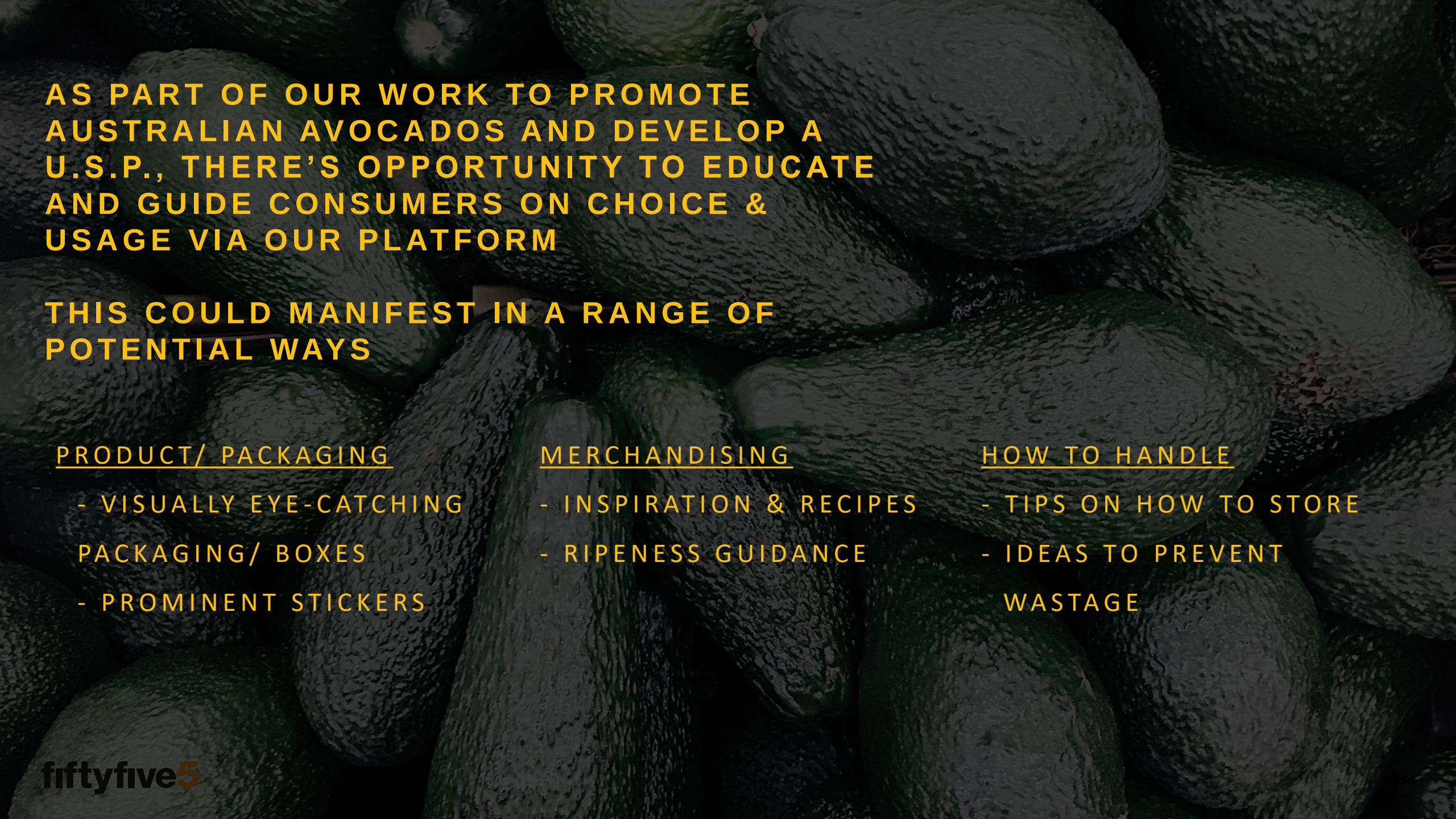
UPMARKET/ PREMIUM GROCER



- Stocking a range of avocados from different COO- including lower & higher priced
- Prominently displayed- elevated wicker baskets/ hay
- Individually wrapped produce draws attention and cues quality/ reassurance around bruising

I was tempted by the USA avocados but it was way too expensive for an avocado! To be fair it does look more premium compared to the others...

LOW FREQUENCY USER, MALAYSIA



AS PART OF OUR WORK TO PROMOTE
AUSTRALIAN AVOCADOS AND DEVELOP A
U.S.P., THERE'S OPPORTUNITY TO EDUCATE
AND GUIDE CONSUMERS ON CHOICE &
USAGE VIA OUR PLATFORM

THIS COULD MANIFEST IN A RANGE OF
POTENTIAL WAYS

PRODUCT/ PACKAGING

- VISUALLY EYE-CATCHING
PACKAGING/ BOXES
- PROMINENT STICKERS

MERCHANDISING

- INSPIRATION & RECIPES
- RIPENESS GUIDANCE

HOW TO HANDLE

- TIPS ON HOW TO STORE
- IDEAS TO PREVENT
WASTAGE

AVOCADOS ARE NOT PART OF THE MAINSTREAM OR LOCAL DIET IN THESE MARKETS

HOME COOKING IS MOSTLY ASIAN-BASED

At home most people are eating Asian food most of the time.

Western style dishes may feature every now and then, but the ingredients are generally more expensive than Asia ingredients which limits their accessibility for some people.

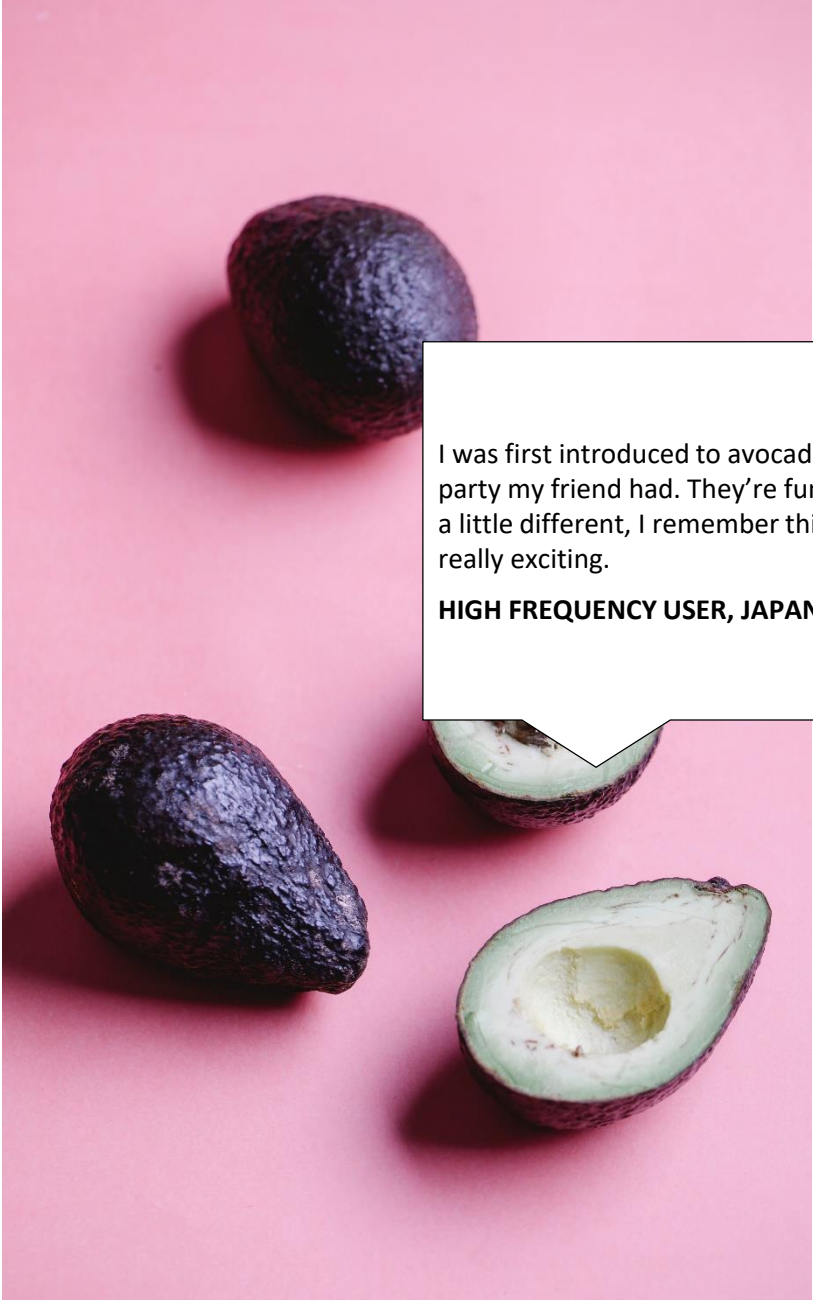
IS THERE AN OPPORTUNITY TO INSPIRE WITH HOW TO INCORPORATE AVOCADO INTO ASIAN-BASED DISHES?

AVOCADOS FEATURE MORE OUTSIDE THE HOME OR FOR SPECIAL OCCASIONS

More associated with eating out at Western cafes/ restaurants, being eaten whilst overseas or featuring at special events/ parties (esp. JP)

Due to this they can have a **strong emotional connection**- and are **often seen as special/ a novelty** for many (esp JP)

IS THERE AN OPPORTUNITY TO LEVERAGE THE 'SPECIALNESS' OF AVOCADOS- BRINGING THE MAGIC OF OUTSIDE, IN?



I was first introduced to avocados at a home party my friend had. They're fun and something a little different, I remember thinking it was really exciting.

HIGH FREQUENCY USER, JAPAN

DESPITE HAVING A LOW KNOWLEDGE/ UNDERSTANDING OF AVOCADOS, MALAYSIAN CONSUMERS LEAD THE WAY IN TERMS OF USAGE & OCCASION VARIETY

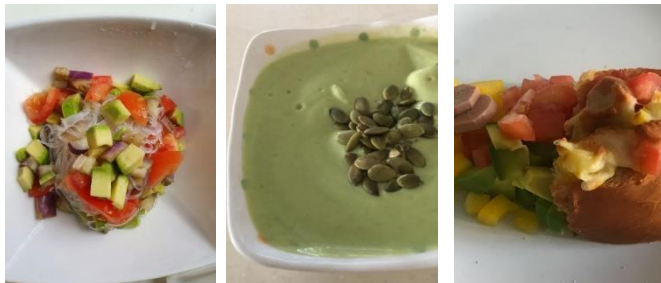


SINGAPORE

- Seen as a **fruit**
- Much more **conservative consumption** BUT they're confident with using avocado in these ways
- Salads, on toast, blended to make a dip

We'll use it to make avocado toast, or add to salads, or as part of a big breakfast. Maybe once a month or so.

MEDIUM FREQUENCY USER, SINGAPORE



JAPAN

- Seen as a **vegetable**
- Reasonably **wide & varied usage**
- Salads, with meat & rice,
- Greater incorporation into local cuisine as avocado *can* be used in sushi (although traditionally it is not)

I'll have it raw with wasabi, or soy sauce. Or I'll add some tuna or salmon if I have some. It's good with salad too, or sometimes rice dishes

HIGH FREQUENCY USER, JAPAN



MALAYSIA

- Seen as a **fruit**
- **Very experimental**- trying lots of things and seeing what works
- Sweet, savoury, shakes, fried
- Range of occasions- snacks, main meals, side dishes

I've tried it a few ways, fried with veggies, or in a shake with honey and chocolate. My favourite is in sushi rolls with chicken and lettuce.

MEDIUM FREQUENCY USER, MALAYSIA



A close-up photograph of a hand holding a halved avocado. The green flesh of the avocado is visible, along with the dark pit. The background is blurred, showing more of the avocado and the hand.

**CULTURAL
CONTEXT**

**AVOCADOS IN
ASIA**

**COUNTRY OF
ORIGIN**

**POSITIONING
TERRITORIES**

THERE'S USUALLY ONLY ONE TYPE OF AVOCADO ON OFFER, CONSUMERS DON'T OFTEN HAVE A CHOICE

In many stores **only one type of avocado is on offer**, and especially in this instance the majority of consumers don't appear to be looking at where the avocados have come from. They're **more interested in the price** and how the avocados look.

Some stores (often more upmarket grocers/ hypermarkets) offer a range of different avocados, with variances in provenance corresponding with variances in price, and levels of display/ packaging.

In this setting some consumers (esp. more knowledgeable) may be inclined to see where the different avocados are from and provenance can sway choice **IF** the consumer has reason/ experience to suggest one is 'better' (defined as being bigger, coming from a higher SES country, higher quality in terms of taste/ texture, more premium packaging) than the other.

High freq consumers appear to express more of a preference based on provenance, with many commenting on the better quality & larger size of avocados from USA/ Australia/ NZ BUT high costs can make them prohibitive.

WE ARE SEEN AS A HIGH QUALITY & PREMIUM GROWER BY A FEW, BUT THERE'S OPPORTUNITY TO RAISE THE PROFILE OF AUSTRALIAN AVOCADOS AND CREATE STRONGER ASSOCIATIONS TO GUIDE CONSUMER CHOICE

I don't know where my avocados come from. I just buy based on whether it's on promotion or not. If it's cheap that week, I'll buy.

MEDIUM FREQUENCY USER, MALAYSIA

There isn't much choice, it's just whatever is available. But I think that avocados from Australia are better- they're bigger and more juicy. If I see them I look at the price to see if they're worth buying.

HIGH FREQUENCY USER, SINGAPORE

CONSUMERS IN ALL THREE MARKETS INTRINSICALLY CONNECT AVOCADOS TO MEXICO BUT MOST DON'T REALLY KNOW, OR PAY ATTENTION, TO WHERE THEIR AVO IS FROM

Many consumers assume, or make a quick connection between **Mexico** and **avocados** but this association is very shallow:

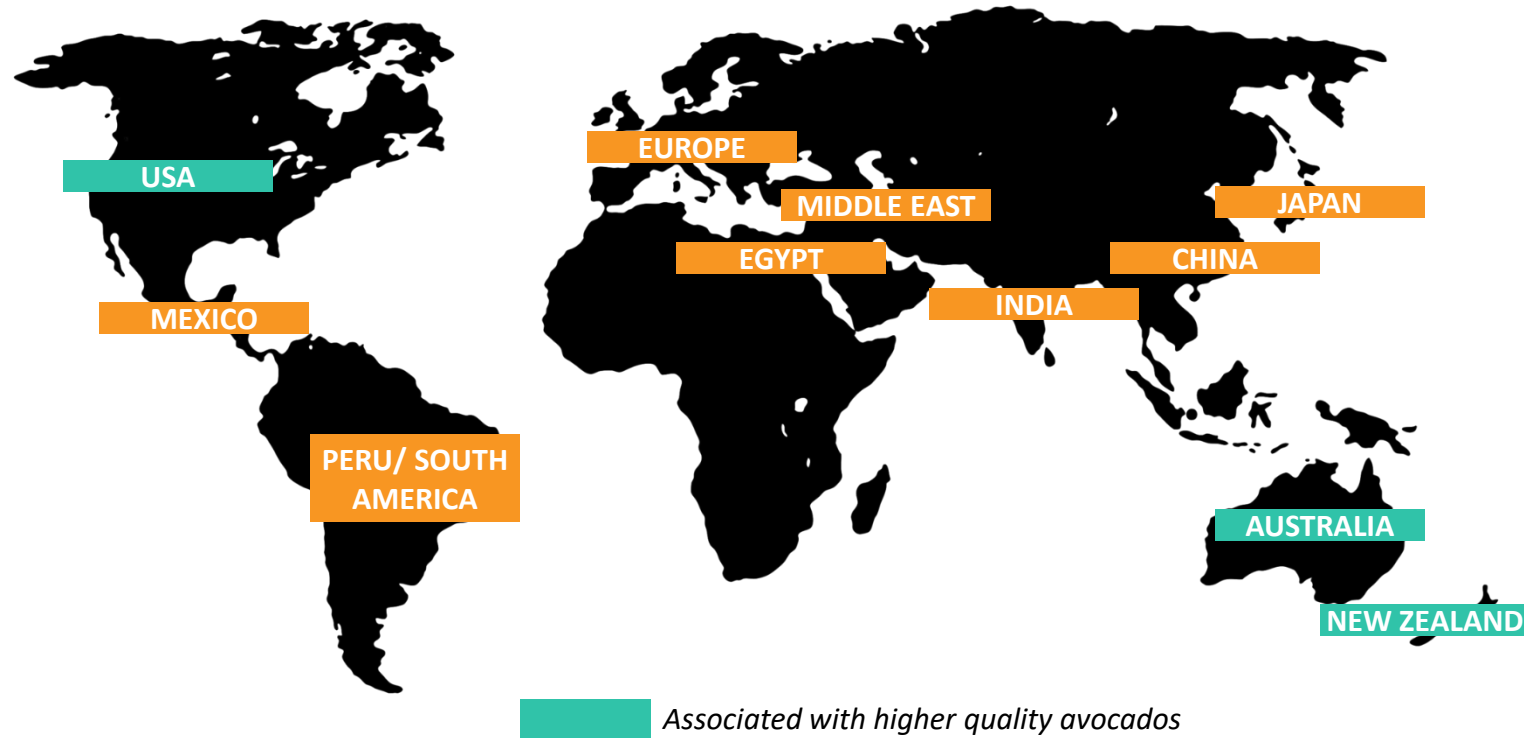
- Prominently features in well known Mexican food, e.g. guacamole
- Hot climate needed to grow avocados
- Avocados often seen in Mexican restaurants

USA (specifically California) is another market with a strong presence in consumers minds, esp. in Singapore, and associated with a good quality avocado product.

Australia & New Zealand are not necessarily the first markets spontaneously connected to avocados for everyone, but they do feature in people's minds and have high quality & size perceptions vs. others largely as a result of **broader positive associations**.

A range of other C.O.O. appear to be present in stores (e.g. Peru, China, Brazil) but consumers often aren't paying a lot of attention.

There is *some* resistance to certain markets (e.g. Singaporeans try to avoid Chinese/ Indonesian produce due to safety/ hygiene concerns) but on the whole consumers aren't paying much attention.





RELATIVE PROXIMITY OF AUSTRALIA VS OTHER C.O.O. INHERENTLY CUES FRESHNESS, BUT THERE'S ALSO A NUMBER OF OTHER POSITIVE ASSOCIATIONS CONSUMERS SEE

CLOSE PROXIMITY = FRESHER

Australia is physically closer to these markets than most other major exporters, therefore the length of time to get to stores is believed to be shorter, allowing for a fresher product.

NATURAL ABUNDANCE

Australia is believed to be a bountiful place of natural wonder. Consumers visualise beautiful oceans, lush greenery, golden sands and a perfect climate for growing excellent produce.

SAFE & CLEAN

Particularly compared with some other markets, Australia's safety & cleanliness associations are high. This extends to our water, soil, lower pollution levels and safe & fair working conditions for farmers.

HIGH QUALITY PRODUCE

On the whole, all produce from Australia is perceived to be incredibly high quality. We are known for exporting high quality fruit, vegetables & nuts, meat, wine and sweet treats.

LEVERAGING THE PERCEIVED FUNCTIONAL BENEFITS OF AUSTRALIAN GROWN PRODUCE COULD PROVIDE A WAY IN FOR AUSTRALIAN AVOCADOS IN THESE MARKETS

IN THEIR OWN WORDS...

When I think of Australia I imagine the **beautiful coast and the clear sea** that brings out the color of the sky. It's a stunning country, so colourful!

MEDIUM FREQUENCY USER, JAPAN

They have **much better conditions** for their farmers and the soils and water are cleaner. **Produce from Australia is much better because of this**

HIGH FREQUENCY USERS, MALAYSIA

Australia! A place I can enjoy the fine weather with a glass of wine. It is **known for producing world class wine** at their wineries because of their **great weather and landscapes**

HIGH FREQUENCY USER, SINGAPORE

Australia has **such amazing natural landscapes**. You can get close to nature—by a park, river or the beach in only 15-20 minutes. In comparison, it's so hard to get access to any of such natural beauty in Singapore.

LOW FREQUENCY USER, SINGAPORE

Australia is **much closer than Mexico**. So the avocados should come to us **quicker and be fresher**. Also better for my carbon footprint!

MEDIUM FREQUENCY USER, SINGAPORE

BEYOND FUNCTIONAL THERE ARE A RANGE OF VERY EMOTIONAL ASSOCIATIONS WITH AUSTRALIA- OFTEN LINKED TO TRAVEL- WHETHER PAST OR ASPIRATIONAL



The sun, **relaxing** by the beach... **Having fun**, eating great food... **holidays!**

MEDIUM FREQUENCY USER, MALAYSIA



Australia is one of those places **that everyone wants to go**. It's so popular for studying abroad.

The **laidback lifestyle**, the weather, the people- **I wish I could be there now!**

LOW FREQUENCY USER, MALAYSIA



My wife Yvonne and I love nature and trekking into mountains. The Tablelands of Cairns was our choice destination for our honeymoon. It had vast rainforests but also the ocean and beaches. **Love Amazing Australia!**

MEDIUM FREQUENCY USER, SINGAPORE



My first overseas trip with my wife was a honeymoon to Australia. It's been 29 years already! The only remaining souvenir is this kangaroo stuffed animal and I treasure it.

HIGH FREQUENCY USER, JAPAN



I've been to Australia twice on a school trip when I was in high school and on an expedition for club activities when I was in college, so I have a strong image of that time. I have such **fond memories**, they were amazing trips. **I'd love to go back.**

HIGH FREQUENCY USER, JAPAN

THERE COULD BE POTENTIAL IN HARNESSING THIS EMOTIONAL CONNECTION WITH AUSTRALIA AS PART OF OUR U.S.P.

THREE KEY FINDINGS

1

ENGAGEMENT
WITH AVOCADOS
IN TERMS OF
PURCHASE &
USAGE VARIES
ACROSS THESE
MARKETS

2

PROVENANCE IS
NOT CURRENTLY A
LARGE DRIVER OF
CHOICE FOR
AVOCADOS

3

AUSTRALIA'S
BRAND IDENTITY
IS STRONG-
ESPECIALLY
WHEN IT COMES
TO FOOD

A background image showing a close-up of a hand holding a sliced avocado. The avocado is cut lengthwise, revealing the green flesh and the large brown pit. The hand is positioned in the center, with fingers visible on the left and right sides. The background is slightly blurred, showing more of the avocado and the hand.

**CULTURAL
CONTEXT**

**AVOCADOS IN
ASIA**

**COUNTRY OF
ORIGIN**

**POSITIONING
TERRITORIES**

IT'S IMPORTANT THAT EACH TERRITORY...

IS GROUNDED IN A CONSUMER NEED OR TENSION

*While we don't know these yet,
desk research gives us some ideas*



REINFORCES A BENEFIT THAT IS RELEVANT AND EXCITING

*There must be a pay off for the
consumer*



IS SINGLE-MINDED, DISTINCT, AND OWNABLE

*We may cross-pollinate later, but
for now they must be distinct*



AND THE SPECIFIC ISSUES WE NEED TO SOLVE...

A LACK OF DIFFERENTIATION BY ORIGIN

Across all three markets we found that awareness and engagement in country-of-origin was low; we need to give people a reason to want to buy Australian

UNCERTAINTY ON USAGE

Many consumers simply don't know how to use avocados so we need a territory that helps inspire a range of recipes, meals, and occasions for enjoying avocados



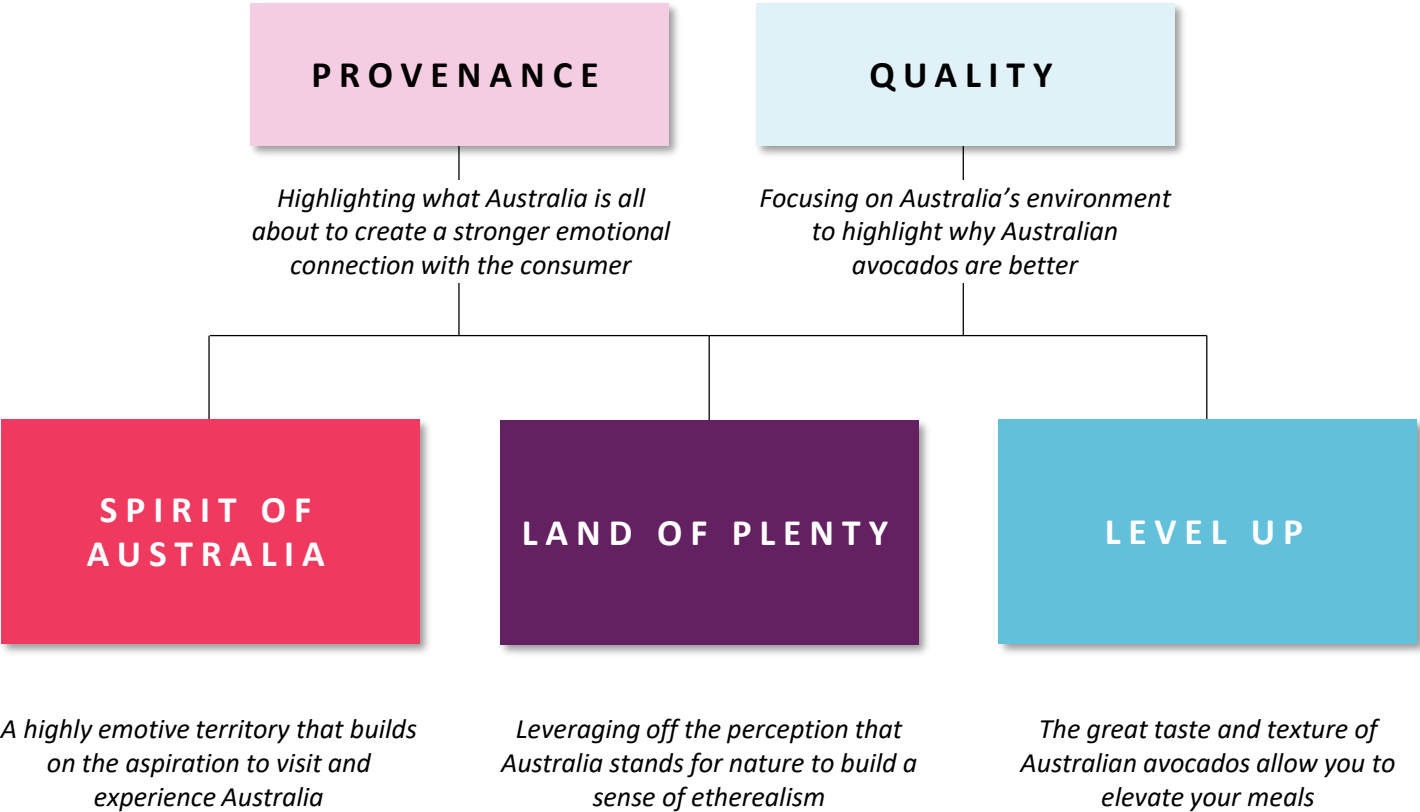
SEEN AS EXPENSIVE

Avocados are seen as a premium product and while this creates positive imagery, we need people to feel like they can afford this little luxury

CONFUSION AT POINT-OF-SALE

Our positioning territory must facilitate education when it comes to choosing avocados in store; thereby ensuring our product meets expectations

WE IDENTIFIED TWO PLATFORMS FOR THE USP, WITH A SERIES OF OPTIONS UNDERNEATH



Aus centric ← **AUSTRALIA IS THE EXPERIENCE WE WANT TO CONNECT TO** → Avo centric

AUSTRALIA IS THE REASON TO BELIEVE OUR AVOCADOS ARE BETTER

SPIRIT OF AUSTRALIA

UNPACKING THE CONCEPT

WHAT'S THE IDEA?

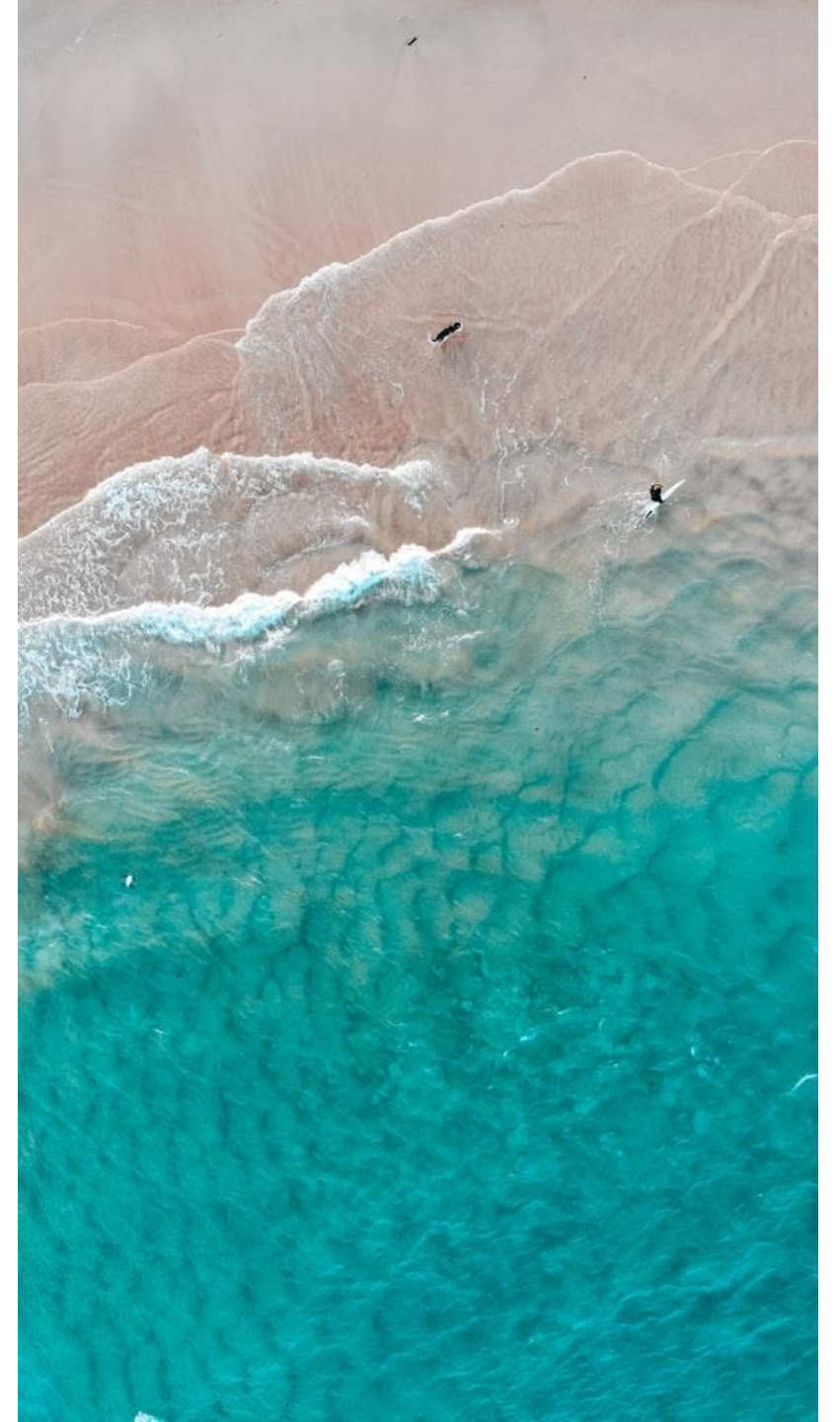
Australia is seen as a beautiful destination with strong perceptions of fun, relaxation, and enjoyment. This territory builds on Australia as an aspirational destination and differentiates Australian avocados through the consumption experience.

HOW DO WE WANT THEM TO FEEL?

Australian avocados are a vehicle for the imagination. Eating an Australian avocado transports the consumer to Australia's sunny beaches and evokes notions of holidays, wellness, and relaxation. In hyperbole, Australian avocados allow consumers to experience Australia without travelling there.

WHAT IMPACT DOES THAT HAVE?

Raises expectations of quality and taste, helping it to differentiate from other countries and buffer against price differences. It plays to consumer needs for foods that are engaging, intriguing, and emotional.



SPIRIT OF AUSTRALIA

WHO DOES IT WELL?



LAND OF PLENTY

UNPACKING THE CONCEPT

WHAT'S THE IDEA?

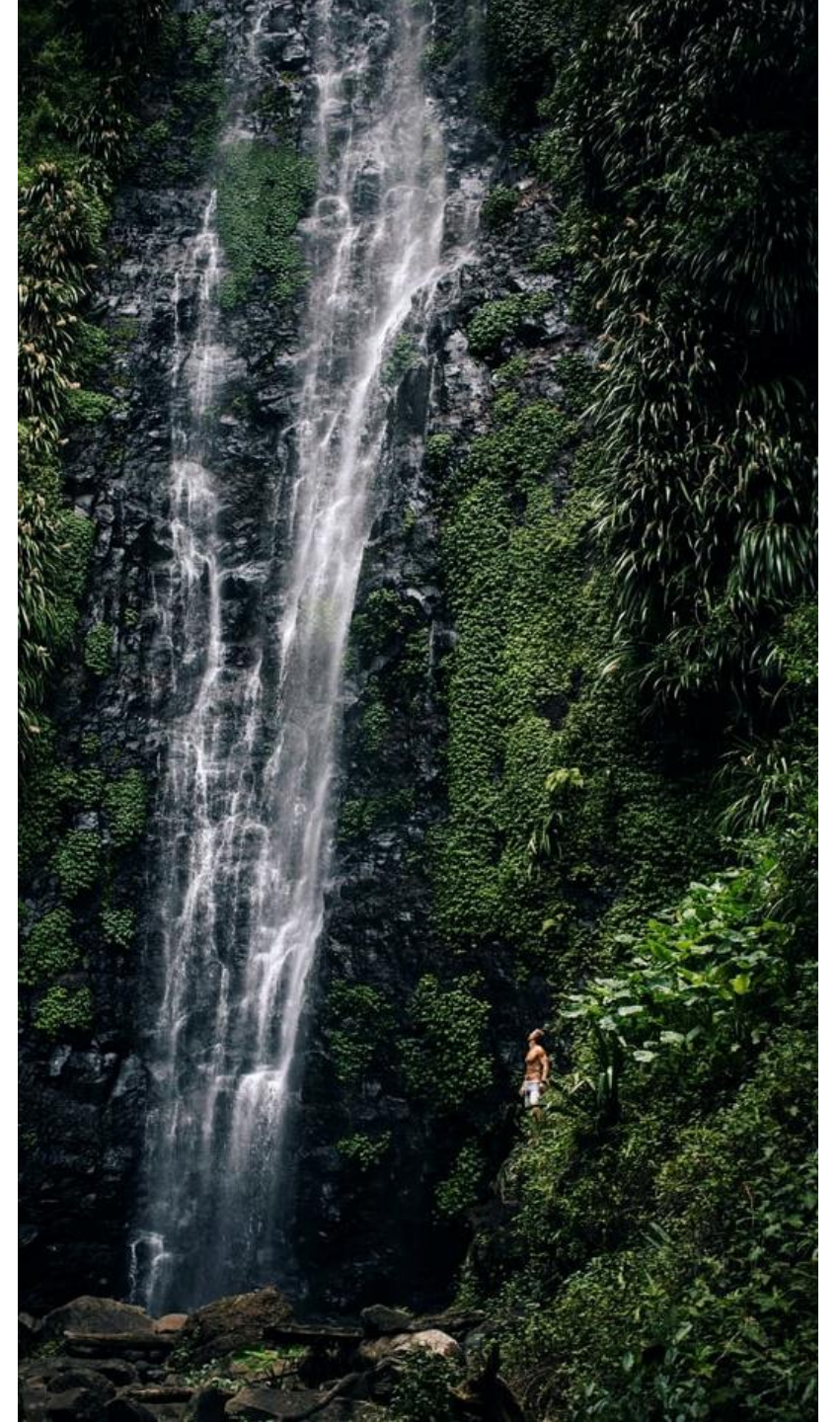
Many recognise the beauty of Australia's natural landscape and that evokes notions of quality fresh produce. This territory focuses on Australia's natural environment and ability to provide an abundance of natural resources, rather than focusing on Avocados explicitly.

HOW DO WE WANT THEM TO FEEL?

Australia is a magical place with an abundance of nature, farms, and fresh produce. Consuming Australian fresh produce, in particular Avocados, allows us to connect to that setting, feeling that the freshness and wonder of the Australian landscape enriches our bodies, minds, and souls.

WHAT IMPACT DOES THAT HAVE?

Differentiates Australian Avocados from other countries, helps to educate consumers on the importance of country of origin.



LAND OF PLENTY

WHO DOES IT WELL?



Find your adventure at patagonia.com

LEVEL UP

UNPACKING THE CONCEPT

WHAT'S THE IDEA?

Australian avocados are high quality, allowing consumers to elevate their meals and make them tastier, fancier, and more delicious. It capitalises on the positive perceptions of Australian fresh produce to strengthen functional perceptions, while also generating emotional benefits.

HOW DO WE WANT THEM TO FEEL?

While all avocados have a premium feel, only Australian avocados add a sense of status, prestige, and quality. Using Australian avocados have the potential to wow friends, add a touch of class, and give them bragging rights, ensuring consumers feel special.

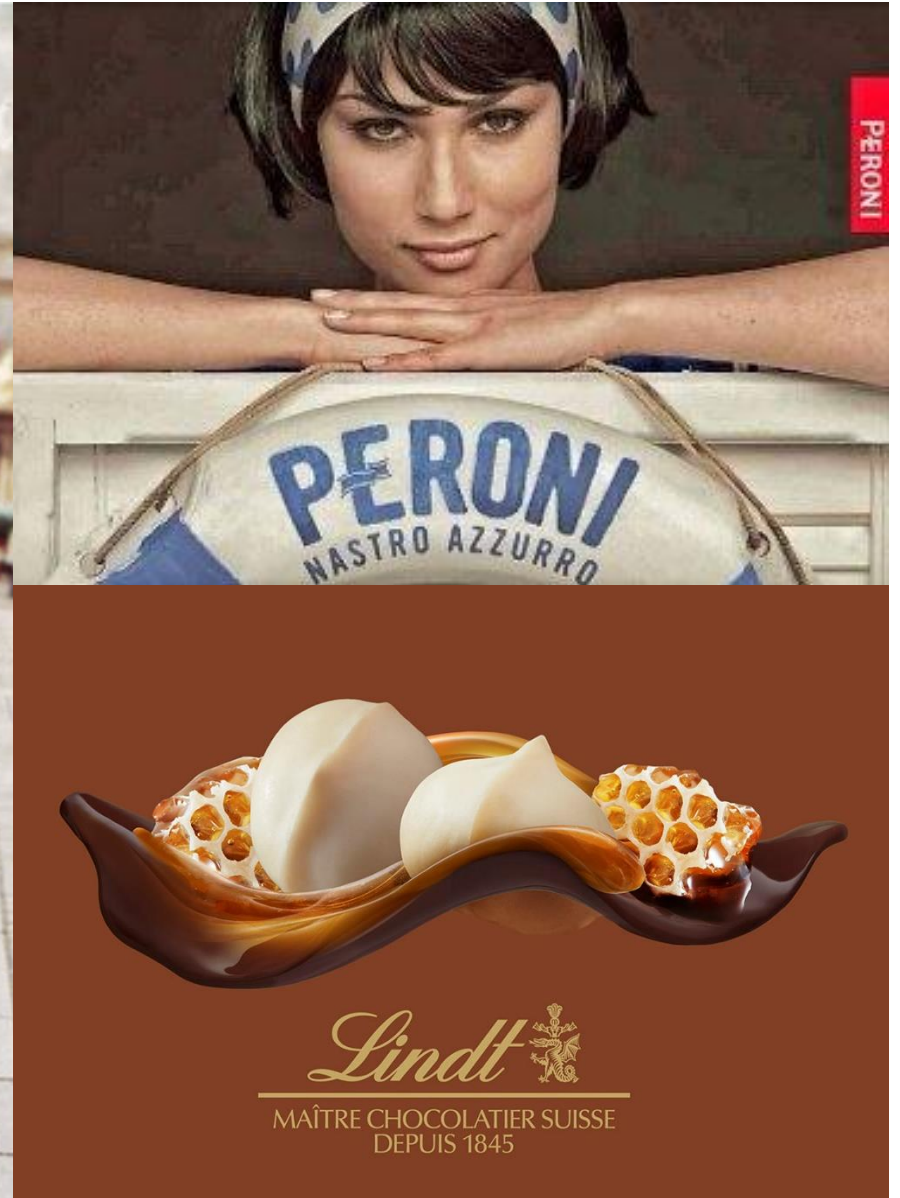
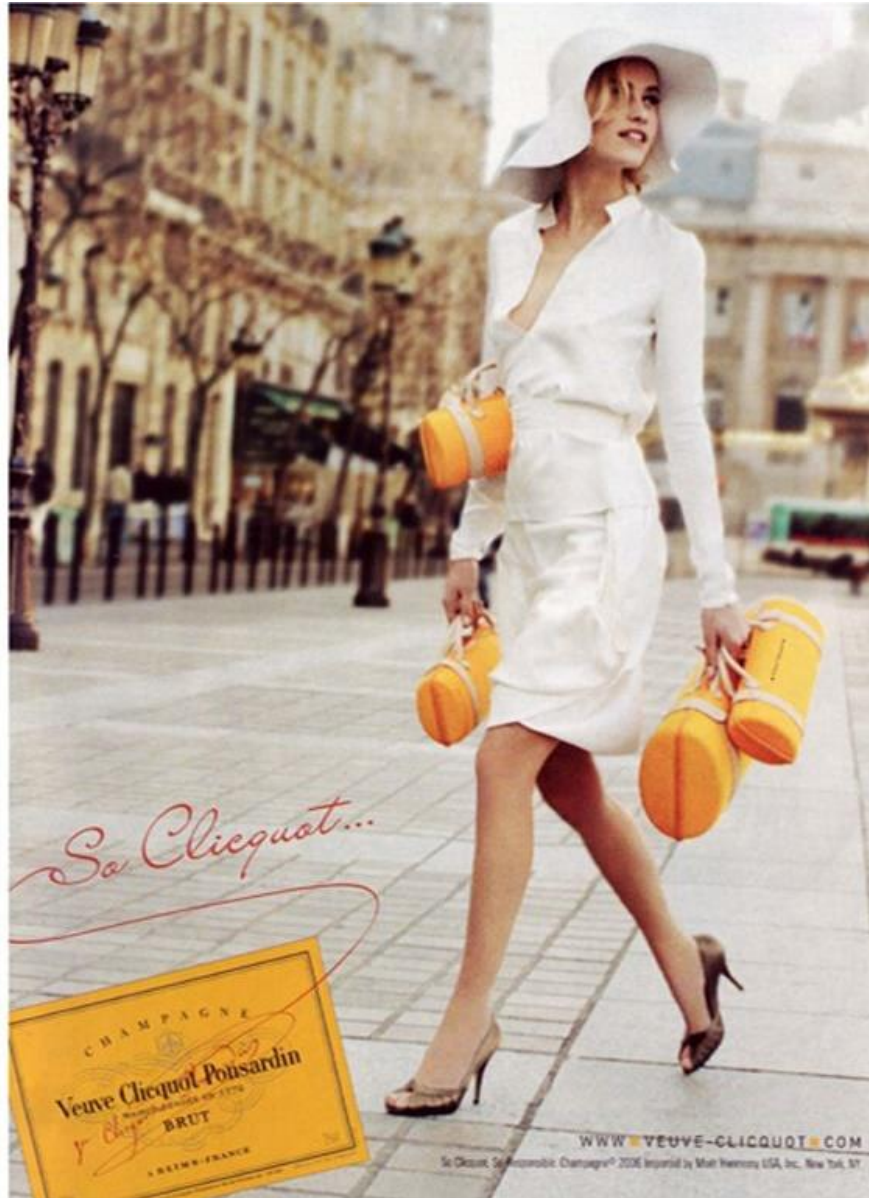
WHAT IMPACT DOES THAT HAVE?

Raises the importance of country of origin when it comes to choosing avocados and help justifies a price premium.



LEVEL UP

WHO DOES IT WELL?



WE HAVE A FRAMEWORK FOR DEVELOPING POSITIONING TERRITORIES FOR USING IN RESEARCH...

Tension

The problem we are trying to solve; can be framed by solving a pain point or by highlighting a better way of doing something for greater benefit

Unique Offer

What the brand brings to the table that no other brand can offer, or no other brand can offer as well

Benefit

What the consumer gets out of the exchange; this can be functional (what I tangibly get) or emotional (how I feel as a result)

Hook

The proposition that ultimately reflects why I will appreciate, take up, and engage with the brand

EACH OF THESE TERRITORIES CAN BE DEVELOPED WITH DISTINCT TENSIONS AND BENEFITS...

TERRITORY OVERVIEW

	SPRIT OF AUSTRALIA	LAND OF PLENTY	LEVEL UP
CUSTOMER NEED / TENSION	Food is more than sustenance, it is about enjoyment	Avocados often don't meet my expectations for quality	I want to jazz up my meals / snacks but many avocados don't cut it
KEY BENEFIT WE ARE SPEAKING TO	Immersive experience, nostalgia	Feeling wholesome and natural	Status and satiation through having "the best"
REASONS TO BELIEVE	Australia is a destination we all want to go to	Australia stands for fresh, clean, and abundant produce	Australia's close proximity means their avocados are fresher and tastier

EACH OF THESE TERRITORIES CAN BE DEVELOPED WITH DISTINCT TENSIONS AND BENEFITS...

MARKET NUANCES

		SPIRIT OF AUSTRALIA	LAND OF PLENTY	LEVEL UP
	JAPAN	Long, well-entrenched perceptions of Australia as an aspirational location	Love affair with seasonality leans into Australia’s sense of etherealism	Aesthetics are essential to food in Japan and an opportunity to “level up”
	SINGAPORE	A very cosmopolitan market means the need to build off “brand Aus” is key	Strong positive perceptions of Australia’s food and wine industry	Increases in diversified imports may provide opportunities to contrast quality
	MALAYSIA	Less stressful lifestyles place greater emphasis of the enjoyment of food experiences	The diversity of Australia’s landscape leans into diversity of foods available	Strong social hierarchy means that many are looking for ways to build status into food

QUANTITATIVE FINDINGS



CATEGORY LANDSCAPE

DRIVERS & BARRIERS

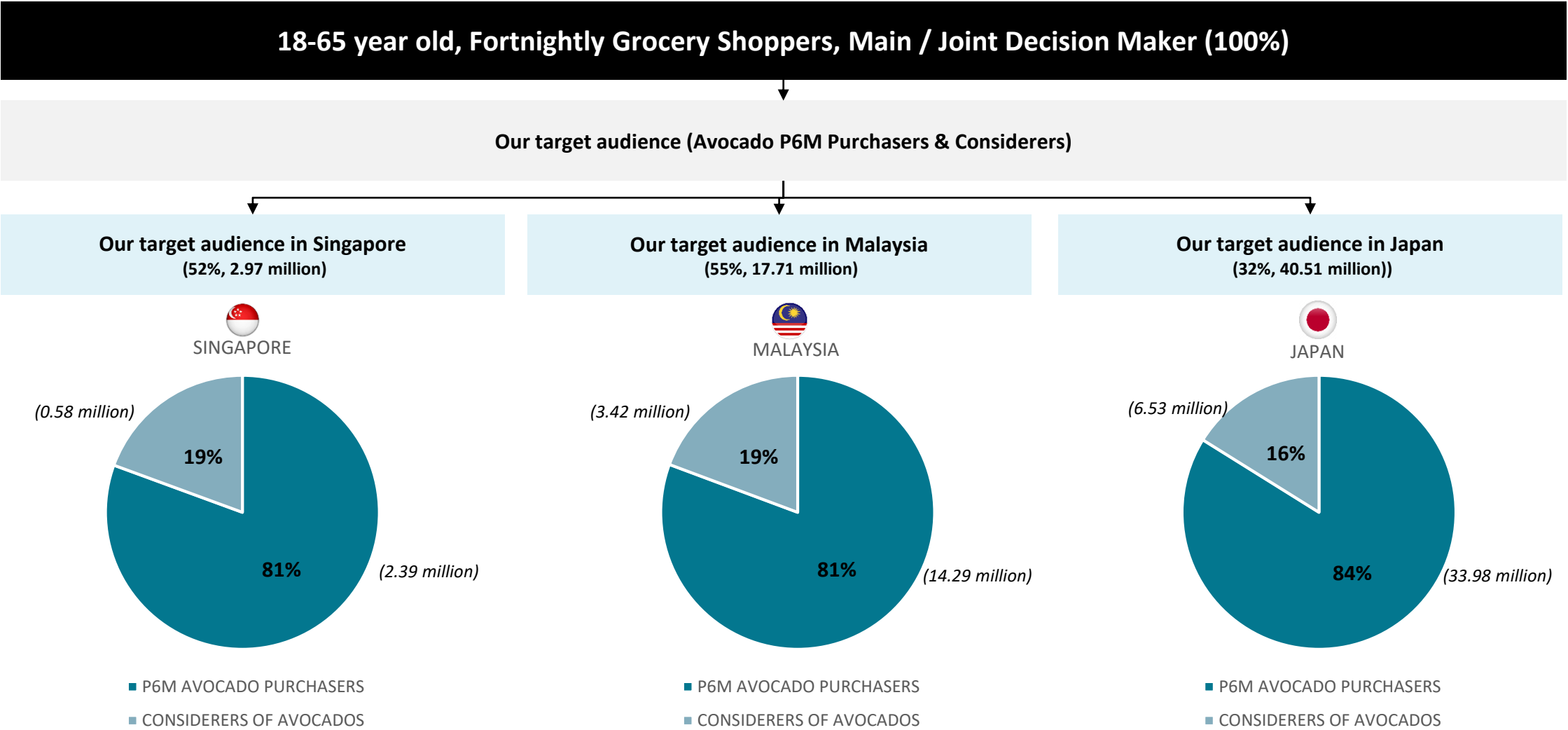
WHO IS OUR BULLSEYE AUDIENCE?

KEY CONSUMER QUESTIONS

TERRITORY EVALUATION

5WS ACTIVATION OPPORTUNITIES

PENETRATION OF TARGET AUDIENCE: OVER HALF OF MAIN GROCERY BUYERS PURCHASING OR CONSIDERING AVOCADOS IN MY & SG, LESS THAN A THIRD IN JAPAN

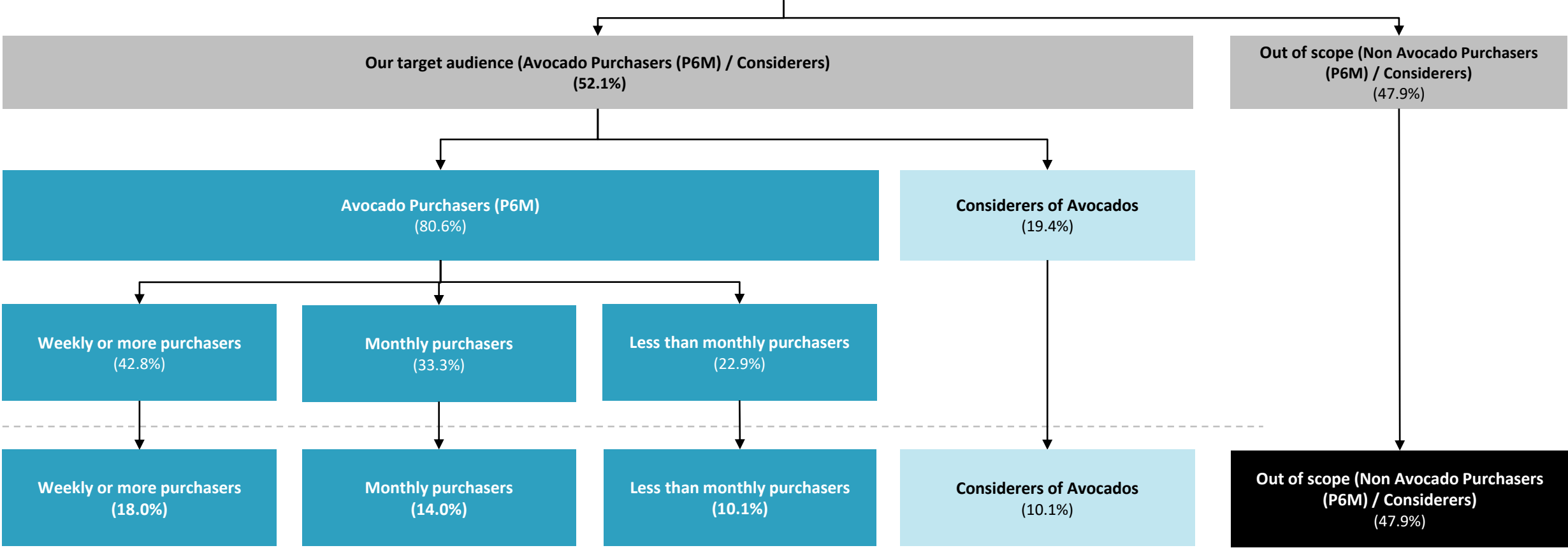




ACROSS THE TOTAL POPULATION, MAJORITY OF OUR TARGET AUDIENCE IS MADE OF ACTUAL CONSUMERS

MAPPING OUT THE AVOCADO LANDSCAPE IN SINGAPORE

18-65 year old, Fortnightly Grocery Shoppers, Main / Joint Decision Maker (100%)



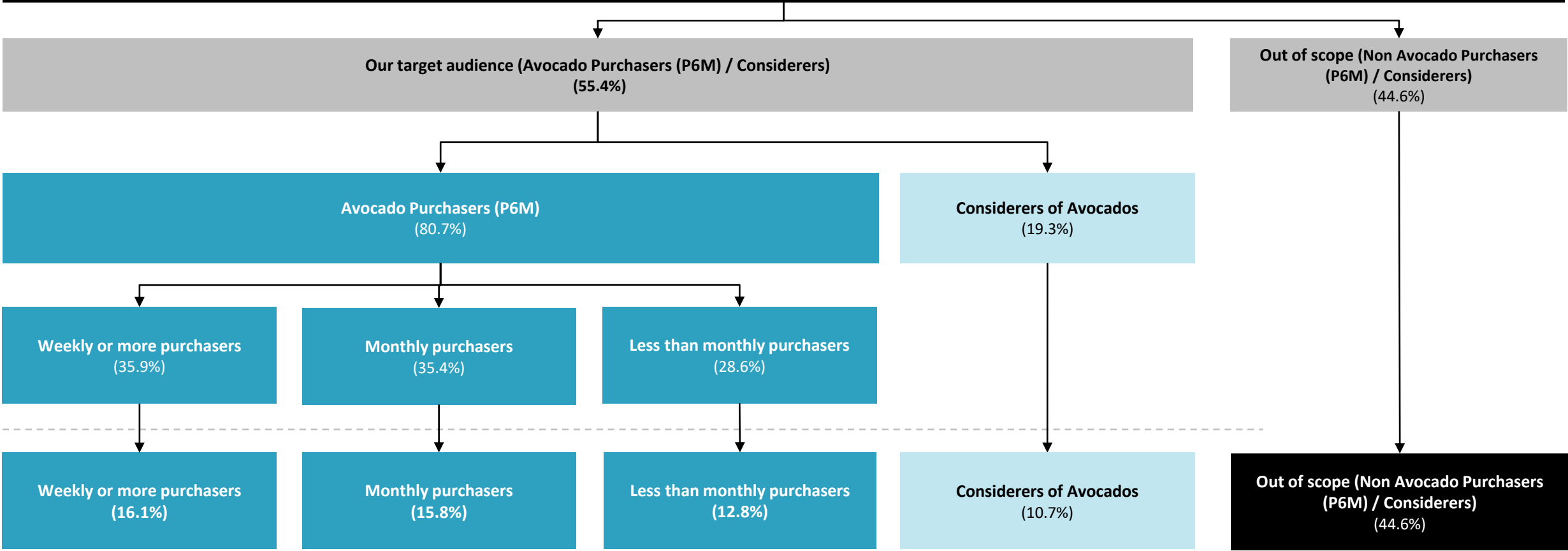
CLOSE TO HALF OF OUR TARGET AUDIENCE PURCHASES AVOCADOS ON AT LEAST ONCE A WEEK BASIS, SUGGESTING DECENT PURCHASE MOMENTUM



ACROSS THE TOTAL POPULATION, MAJORITY OF OUR TARGET AUDIENCE IS MADE OF ACTUAL CONSUMERS

MAPPING OUT THE AVOCADO LANDSCAPE IN MALAYSIA

18-65 year old, Fortnightly Grocery Shoppers, Main / Joint Decision Maker (100%)

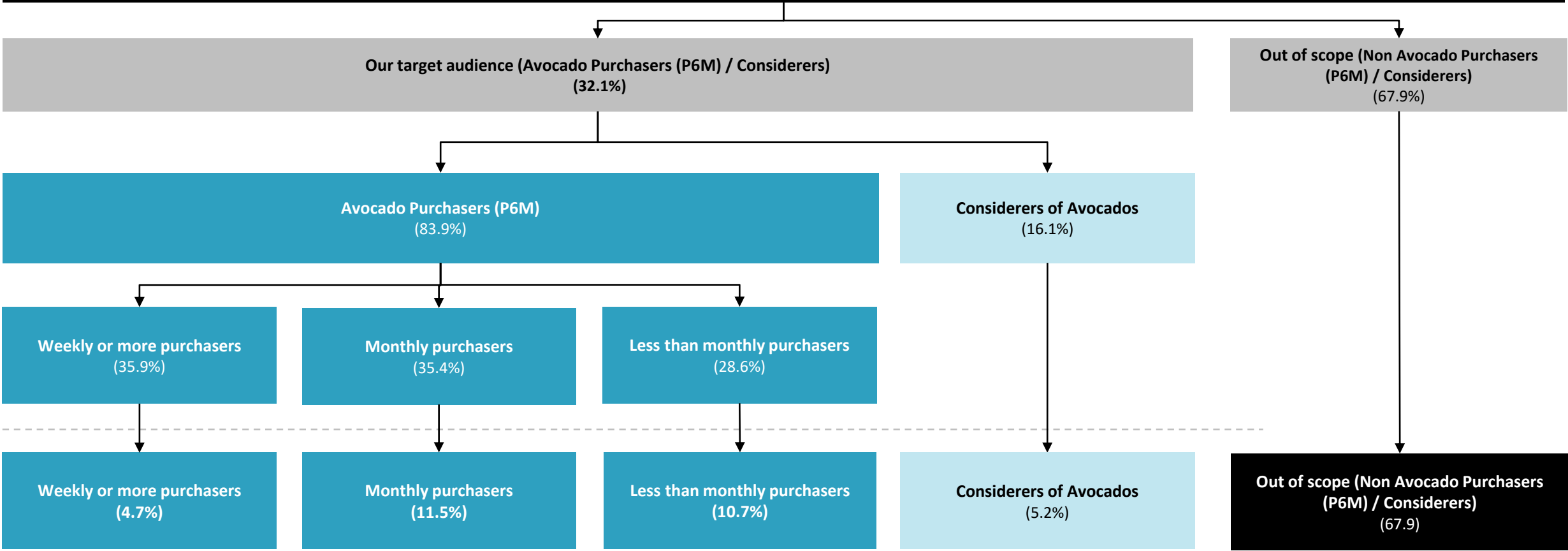


THERE SEEMS TO BE A RELATIVELY EVEN SPLIT ACROSS PURCHASERS IN TERMS OF AVOCADO PURCHASE FREQUENCY

ACROSS THE TOTAL POPULATION, ONLY 1 OUT OF 3 FALLS UNDER OUR TARGET AUDIENCE

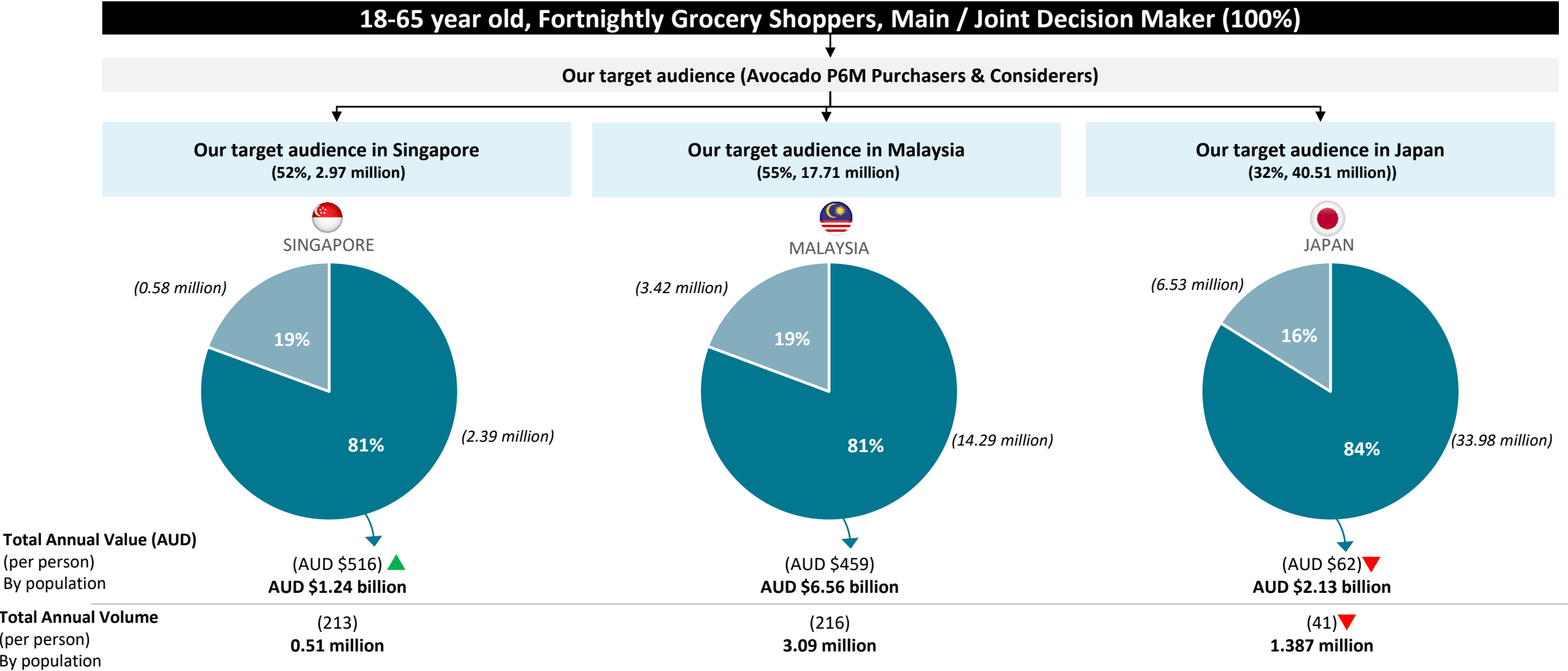
MAPPING OUT THE AVOCADO LANDSCAPE IN JAPAN

18-65 year old, Fortnightly Grocery Shoppers, Main / Joint Decision Maker (100%)



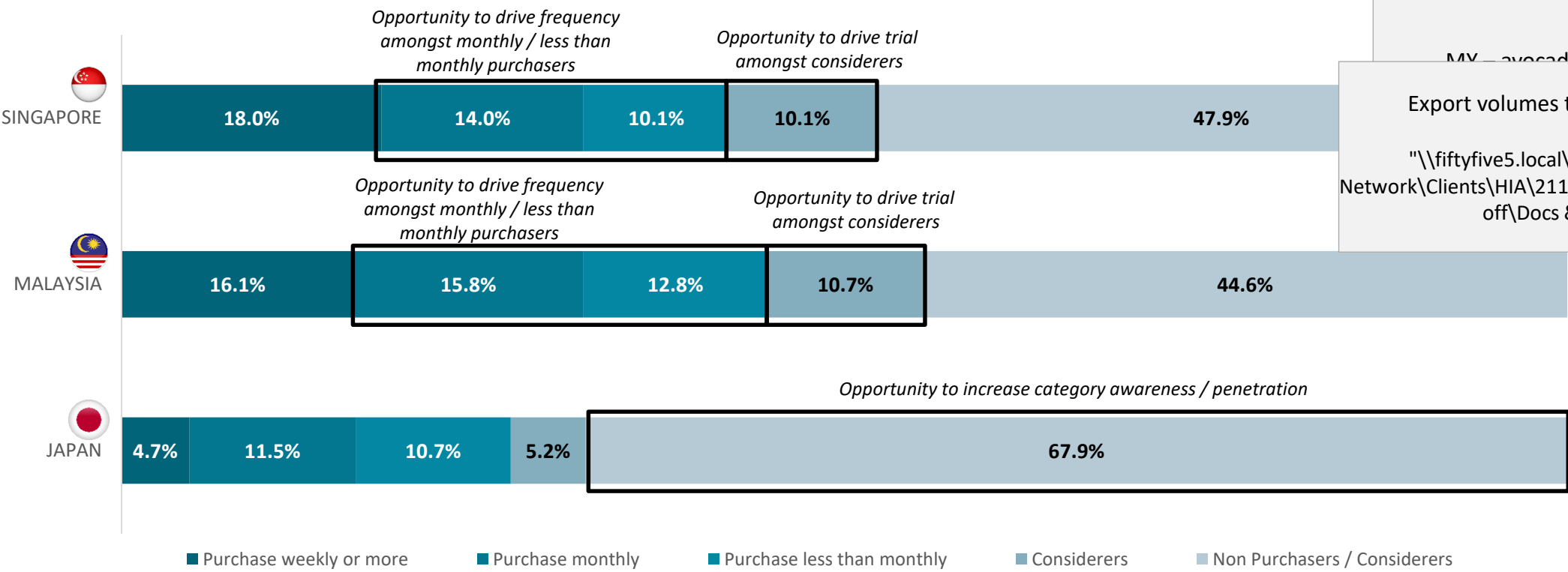
THE KEY FOCUS HERE IS TO EXPAND CATEGORY AWARENESS

PER AVOCADO SPEND IS SIGNIFICANTLY HIGHER IN SG THAN MY. OVERALL, MY WARRANTS THE BIGGEST ANNUAL VALUE SHARE



COMPARED TO JAPAN, SEA MARKETS (SG & MY) SEE HIGHER AVOCADO PENETRATION, WITH MAJORITY PURCHASING AVOCADOS MONTHLY

PENETRATION OF AVOCADOS BY MARKETS



Japanese super conservative, recently started exports – unless they know how use it / pair it – they are slightly hesitant buy

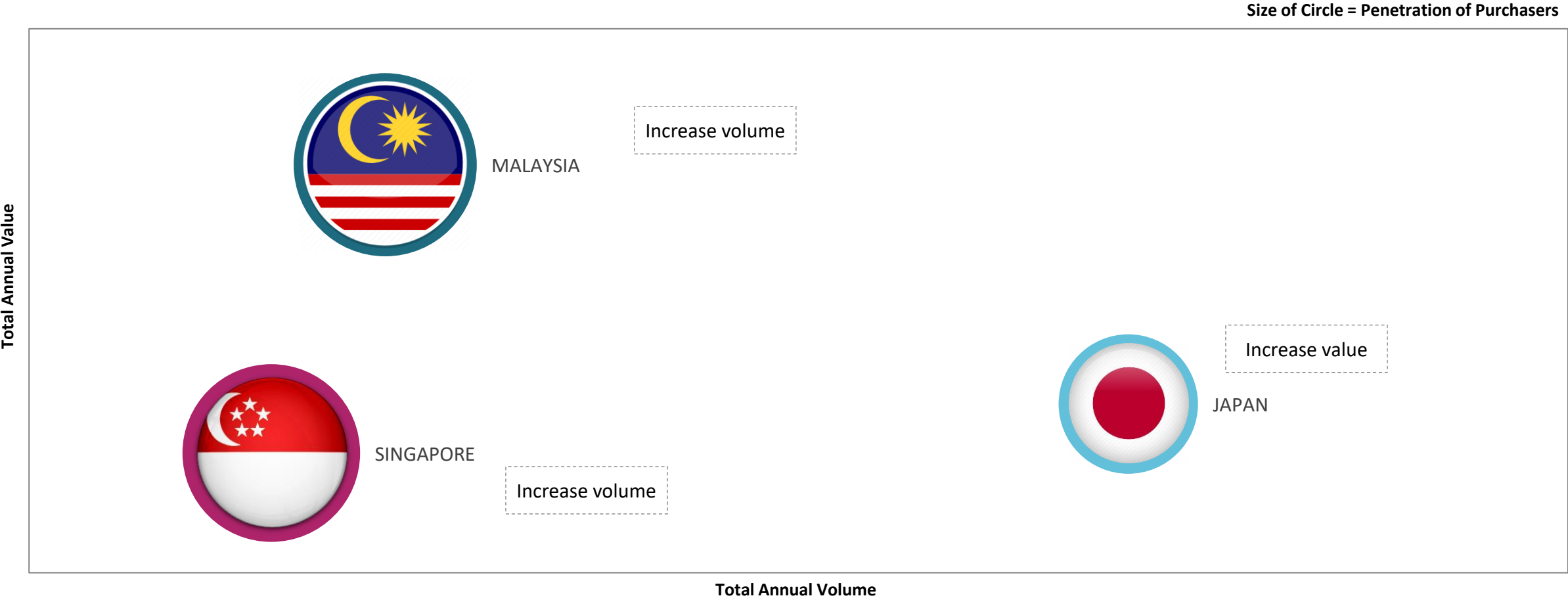
MY – avocado with everything

Export volumes to JP / MY / SG

"\\fiftyfive5.local\data\Fiftyfive5-Network\Clients\HIA\211167 Project Smash\Kick off\Docs & Data"

GROWTH OPPORTUNITIY FOR SG & MY IN DRIVING FREQUENCY OF PURCHASE, AS WELL AS CONVERTING CONSIDERERS TO PURCHASERS
JAPAN OPPORTUNITY IS A CATEGORY PUSH TO INCREASE AWARENESS AND CONSIDERATION

SUMMARY OF VOLUME VS. VALUE VS. PENETRATION ACROSS KEY MARKETS





CATEGORY LANDSCAPE

DRIVERS & BARRIERS

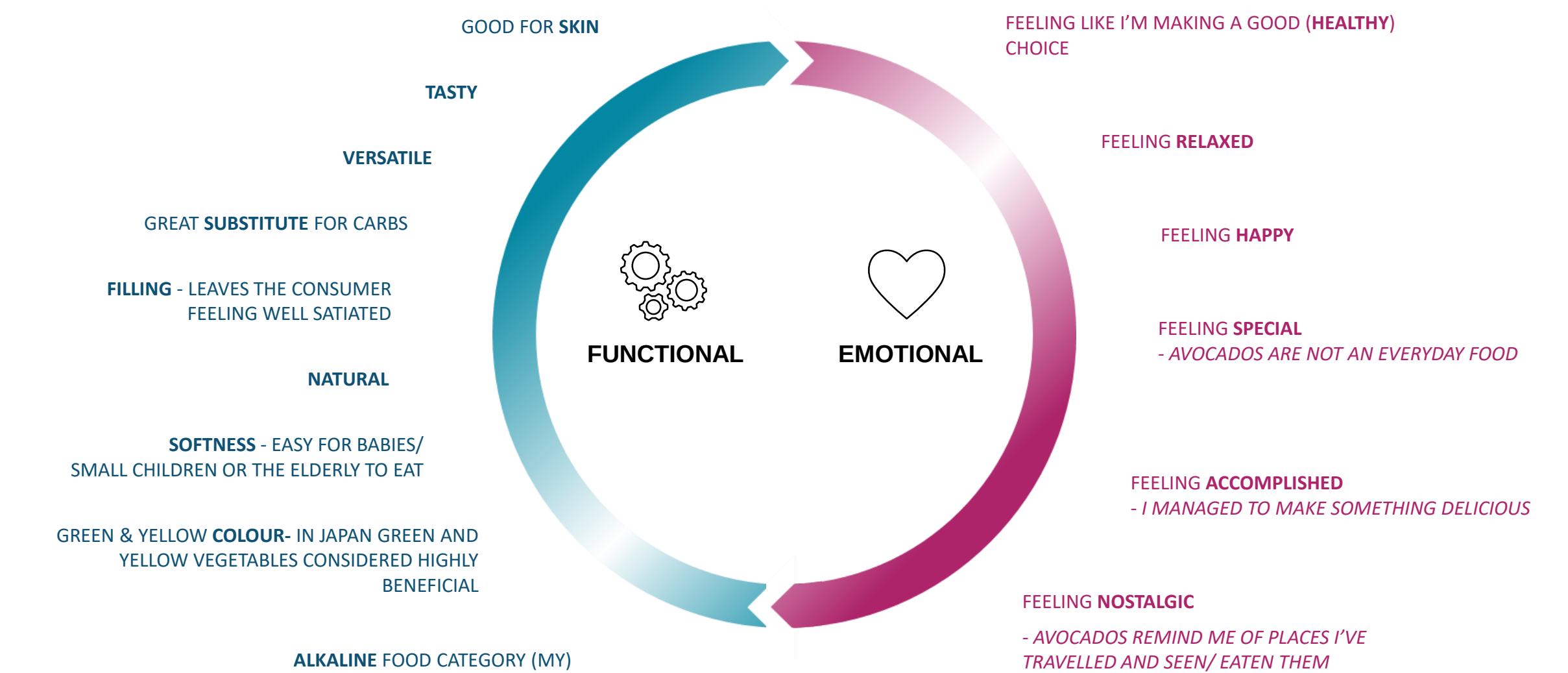
WHO IS OUR BULLSEYE AUDIENCE?

KEY CONSUMER QUESTIONS

TERRITORY EVALUATION

5WS ACTIVATION OPPORTUNITIES

IN THE QUAL STAGE, WE UNCOVERED A RANGE OF FUNCTIONAL AND EMOTIONAL BENEFITS ASSOCIATED WITH EATING AVOCADOS IN ADDITION TO HEALTH



IN QUANT, FUNCTIONAL BENEFITS WERE BIGGER MOTIVATORS, WITH EVIDENT DIFFERENCES ACROSS MARKETS

JP is about sensorial indulgence i.e. taste, satisfying a craving, whereas SEA markets are more focused on health benefits (healthy fats, nutrients)

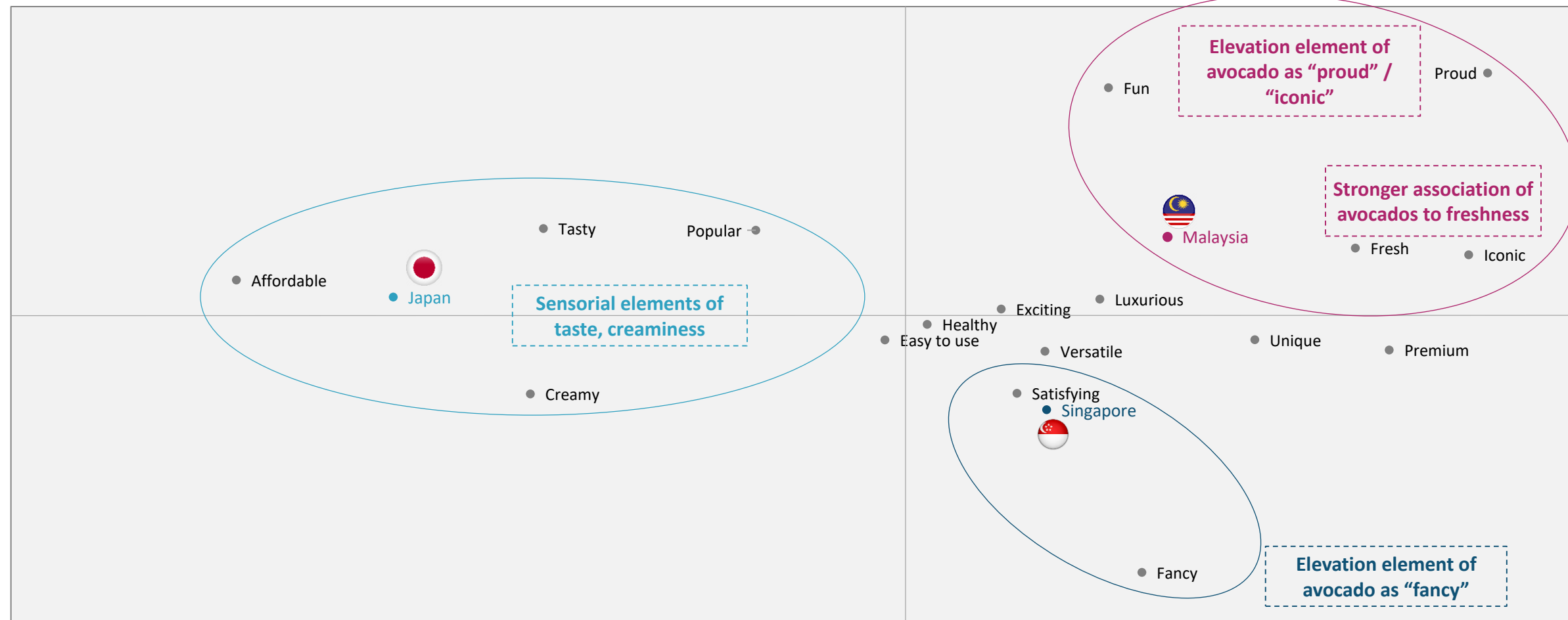
Which of the following statements describes your reasons for consuming avocado? [PURCHASERS ONLY]

		SINGAPORE	MALAYSIA	JAPAN
FUNCTIONAL NET		96%	97%	94%
It contains good / healthy fats	48%	61%	45%	37%
It is packed with vitamins, minerals and nutrients	47%	41%	57%	43%
I love the taste / texture	45%	38%	35%	61%
It contains antioxidants	31%	39%	39%	16%
It is great for my skin / keeps it youthful	26%	24%	26%	27%
It is convenient / easy to prepare	22%	25%	30%	12%
They are ideal for quick meals / snacks	19%	22%	25%	9%
It contains low amount of carbohydrates / sugar	18%	21%	25%	7%
I can use it in many different ways / meals	15%	17%	21%	8%
It helps me to lose weight	12%	12%	20%	4%
It is a regular part of my family / my diet	11%	13%	15%	7%
EMOTIONAL NET		58%	52%	49%
I want something healthy to eat	31%	36%	31%	27%
They satisfy a taste craving	14%	14%	10%	19%
It makes me feel that I am taking an active step to a healthier diet / lifestyle	13%	20%	15%	4%
It makes me feel wholesome (i.e. feeling emotionally satiated)	11%	12%	16%	6%
It makes me feel full (i.e. physically satiated)	9%	11%	9%	7%
It adds sophistication / premiumisation to my meals	9%	8%	10%	8%
I want to elevate / jazz up my meals	8%	7%	7%	10%
It reminds me of happy memories	4%	5%	6%	2%

THESE DIFFERENCES WERE REFLECTED IN AVOCADO ASSOCIATIONS TOO

Avocado is associated with sensorial elements (creaminess and taste) and affordability in JP (they are used to paying higher prices for groceries), with health taking a backseat
As for SEA markets, avocados are perceived to be an **elevation of status** (fancy, proud, iconic), and **fun / freshness** particular in MY

Which of the following words would you use to describe avocados?



KEY PURCHASE BARRIERS TO AVOCADOS IN SG/MY ARE COST AND AVAILABILITY DRIVEN. FOR JAPAN, THE KEY BARRIERS ARE CONSUMER CONFIDENCE AND APEARANCE & RIPENESS

Which of the following painpoints / barriers are relevant to you? – DURING PURCHASE		SINGAPORE	MALAYSIA	JAPAN
<u>PURCHASE PAINPOINTS NET</u>		85%	87%	70%
QUALITY NET	43%	44%	39%	45%
AVAILABILITY NET	23%	28%	35%	5%
Too expensive to buy regularly	36%	47%	51%	11%
I am not confident in choosing the perfect avocado	27%	27%	21%	32%
Not ripe enough when I want to buy them	22%	22%	19%	25%
Sometimes they are bruised inside which puts me off	21%	24%	10%	28%
The quality of avocados where I do my grocery shopping at is not very good	12%	12%	19%	6%
Not in season	9%	13%	13%	1%
Do not think of buying them when I am at the store	9%	6%	12%	7%
I have to go to another grocery store just to buy avocados / better quality avocados	7%	8%	10%	3%
Always out of stock at the store	7%	7%	13%	1%
I wanted avocados from a specific country, but it was not available	6%	8%	10%	1%
I do my grocery shopping online which does not guarantee the quality of avocados	5%	8%	7%	1%
There is no signage for avocados which makes it difficult to find in store	3%	3%	6%	1%



There is some aspect of physical aesthetics coming into play (i.e. put off by bruising) – where avocados are expected to look good on the outside as well as on the inside



Key availability barriers also have to do with lack of quality avocados for purchase

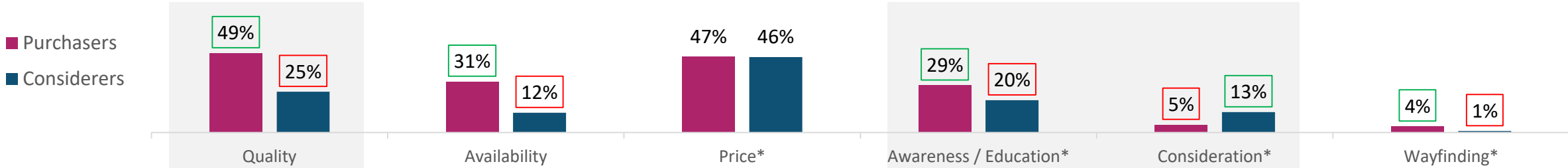


Consumers do not like uncertainty when it comes to grocery purchase - they are looking to be guided on avocado selection in-store (via ripeness, colour, texture / feel), and tend to rely more heavily on aesthetics during grocery purchase [cultural secondary research]

While there are already ongoing in-store prompts as seen from the qual, we need to ensure a right balance between information relevance and over-stimulation – what kind of information helps best during avocado purchase?

IN GENERAL, QUALITY, AVAILABILITY AND AWARENESS CONCERNS TEND TO PLAGUE PURCHASERS WHEN CHOOSING AVOCADOS, WHILE AVOCADOS ARE NOT IN THE CONSIDERATION SET FOR CONSIDERERS AT THE STORE

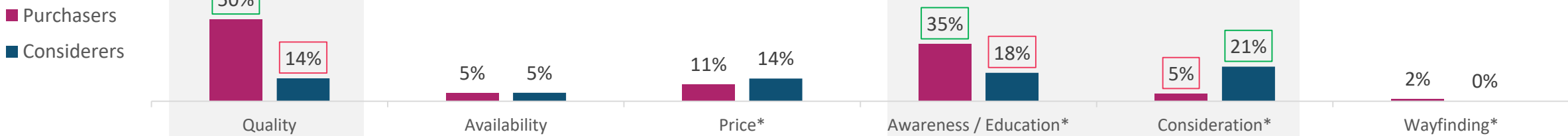
Which of the following painpoints / barriers are relevant to you? – DURING PURCHASE
SINGAPORE



MALAYSIA



JAPAN



[HIDDEN] FULL BREAKDOWN – PURCHASERS VS. CONSIDERS (SINGAPORE)

Which of the following painpoints / barriers are relevant to you? – DURING PURCHASE

		Total Singapore	Purchasers	Considerers
PRICE	Too expensive to buy regularly	47%	47%	46%
EDUCATION / AWARENESS	I am not confident in choosing the perfect avocado	27%	29%	20%
QUALITY	Sometimes they are bruised inside which puts me off	24%	28%	9%
QUALITY	Not ripe enough when I want to buy them	22%	24%	13%
AVAILABILITY	Not in season	13%	14%	8%
QUALITY	The quality of avocados where I do my grocery shopping at is not very good	12%	12%	10%
AVAILABILITY	I wanted avocados from a specific country, but it was not available	8%	10%	2%
AVAILABILITY	I have to go to another grocery store just to buy avocados / better quality avocados	8%	9%	2%
QUALITY	I do my grocery shopping online which does not guarantee the quality of avocados	8%	9%	2%
AVAILABILITY	Always out of stock at the store	7%	7%	3%
CONSIDERATION	Do not think of buying them when I am at the store	6%	5%	13%
WAYFINDING	There is no signage for avocados which makes it difficult to find in store	3%	4%	1%
Average		16%	16%	11%

PURCHASERS

Price is the biggest barrier in regular purchases, followed by uncertainty in choosing “perfect” avocados. Inner bruising and lack of ripeness are the next two barriers

Implication:

Consider to have POS activation to guide on choosing best avocados (i.e. touch, sight), or a guideline of approximating colour to required time for ripeness

CONSIDERERS

Avocado is not in their basket list during grocery occasions

Implication:

Is there a way to implant / emphasize avocado seasons to create awareness in stores?

[HIDDEN] FULL BREAKDOWN – PURCHASERS VS. CONSIDERS (MALAYSIA)

Which of the following painpoints / barriers are relevant to you? – DURING PURCHASE

		Total Malaysia	Purchasers	Considerers
PRICE	Too expensive to buy regularly	51%	51%	53%
EDUCATION / AWARENESS	I am not confident in choosing the perfect avocado	21%	23%	15%
QUALITY	The quality of avocados where I do my grocery shopping at is not very good	19%	20%	13%
QUALITY	Not ripe enough when I want to buy them	19%	22%	5%
AVAILABILITY	Not in season	13%	15%	8%
AVAILABILITY	Always out of stock at the store	13%	15%	7%
CONSIDERATION	Do not think of buying them when I am at the store	12%	8%	27%
AVAILABILITY	I have to go to another grocery store just to buy avocados / better quality avocados	10%	11%	7%
QUALITY	Sometimes they are bruised inside which puts me off	10%	11%	6%
AVAILABILITY	I wanted avocados from a specific country, but it was not available	10%	10%	7%
QUALITY	I do my grocery shopping online which does not guarantee the quality of avocados	7%	8%	4%
WAYFINDING	There is no signage for avocados which makes it difficult to find in store	6%	6%	6%
Average		16%	17%	13%

PURCHASERS

Price is the biggest barrier in regular purchases, followed by uncertainty in choosing “perfect” avocados. Inner bruising and lack of ripeness are the next two barriers. Lack of stock and seasonality affects availability

Implication:

Consider to have POS activation to guide on choosing best avocados (i.e. touch, sight), or a guideline of approximating colour to required time for ripeness

CONSIDERERS

Price is the biggest barrier in regular purchases, followed by lack of consideration for avocados in their shopping list. Uncertainty in choosing “perfect” avocados and lack of access to quality avocados at where they shop are the next two barriers

Implication:

Is there a way to implant / emphasize avocado seasons to create awareness in stores? Consider to have POS activation to guide on choosing avocados (i.e. touch, sight)

[HIDDEN] FULL BREAKDOWN – PURCHASERS VS. CONSIDERS (JAPAN)

Which of the following painpoints / barriers are relevant to you? – DURING PURCHASE

		Total Japan	Purchasers	Considerers
EDUCATION / AWARENESS	I am not confident in choosing the perfect avocado	32%	35%	18%
QUALITY	Sometimes they are bruised inside which puts me off	28%	32%	5%
QUALITY	Not ripe enough when I want to buy them	25%	28%	9%
PRICE	Too expensive to buy regularly	11%	11%	14%
CONSIDERATION	Do not think of buying them when I am at the store	7%	5%	21%
QUALITY	The quality of avocados where I do my grocery shopping at is not very good	6%	6%	4%
AVAILABILITY	I have to go to another grocery store just to buy avocados / better quality avocados	3%	3%	2%
AVAILABILITY	Not in season	1%	1%	3%
WAYFINDING	There is no signage for avocados which makes it difficult to find in store	1%	2%	0%
AVAILABILITY	I wanted avocados from a specific country, but it was not available	1%	1%	0%
QUALITY	I do my grocery shopping online which does not guarantee the quality of avocados	1%	1%	1%
AVAILABILITY	Always out of stock at the store	1%	1%	1%
Average		10%	10%	6%

PURCHASERS

Uncertainty in choosing “perfect” avocados is the biggest challenge, followed by inner bruising and lack of ripeness

Implication:

Consider to have POS activation to guide on choosing best avocados (i.e. touch, sight), or a guideline of approximating colour to required time for ripeness

CONSIDERERS

Mostly there is a lack of consideration for avocados in their shopping list. Other barriers include uncertainty in choosing “perfect” avocados, high price points and lack of ripeness

Implication:

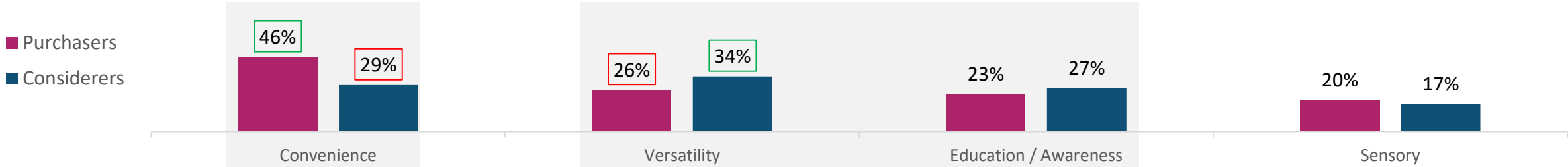
Is there a way to implant / emphasize avocado seasons to create awareness in stores? Consider to have POS activation to guide on choosing avocados (i.e. touch, sight)

WHEN IT COMES TO USAGE, STORAGE & VERSATILITY BARRIERS ARE MORE PRONOUNCED FOR SG; JP STRUGGLES WITH AWARENESS ON MEAL VARIETIES COMPATIBLE WITH AVOCADOS

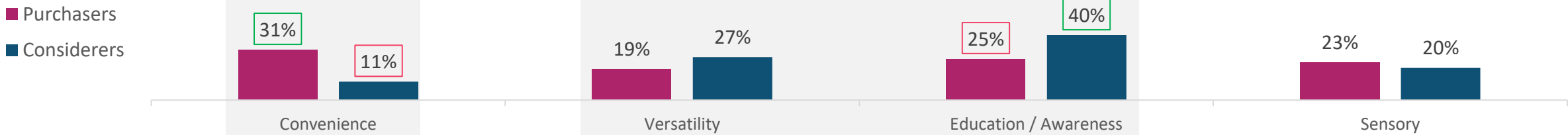
Which of the following painpoints / barriers are relevant to you? - USAGE		SINGAPORE	MALAYSIA	JAPAN
USAGE PAINPOINTS NET		76%	70%	70%
STORAGE / PREP NET	32%	43%	27%	26%
EDUCATION / AWARENESS NET	29%	24%	28%	34%
VERSATILITY NET	23%	27%	21%	21%
SENSORY NET	17%	19%	23%	9%
Still do not know many meals to prepare with them	17%	11%	17%	25%
It has a short shelf life	16%	21%	16%	10%
Takes too long to ripen	16%	23%	11%	14%
I do not know how to store and keep avocados	12%	11%	14%	11%
I am the only one in the household who eats avocados	12%	12%	11%	12%
Not as versatile as other fruits / vegetables	11%	10%	8%	15%
Avocados do not go with most of my meals	9%	13%	12%	3%
They are bland / flavourless when I eat them	9%	10%	12%	3%
Only for special occasions	8%	10%	7%	7%
I am not confident using / preparing them	8%	10%	8%	5%
The texture is different from what I expected	7%	8%	9%	4%
Too much effort / messy to prepare	6%	8%	5%	5%
I don't like the taste	5%	6%	8%	3%
Too large to eat in one portion and would go to waste	4%	7%	4%	2%
Not as many health benefits as other fruits / vegetables	2%	2%	2%	1%

IN GENERAL, CONVENIENCE (I.E. UNCERTAINTY ON STORAGE DURATION / MESSY PREP / LONG TIME TO RIPE) TOPS USAGE BARRIERS ACROSS PURCHASERS, WHILE CONSIDERERS ARE BATTERED BY VERSATILITY CHALLENGES AND AWARENESS

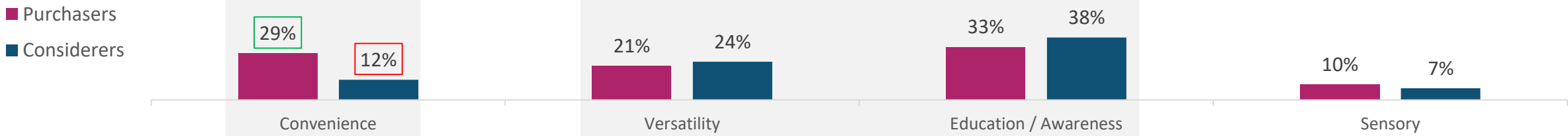
Which of the following painpoints / barriers are relevant to you? – DURING USAGE
SINGAPORE



MALAYSIA



JAPAN



[HIDDEN] FULL BREAKDOWN – PURCHASERS VS. CONSIDERS (SINGAPORE)

Which of the following painpoints / barriers are relevant to you? – DURING USAGE

		Total Singapore	Purchasers	Considerers
CONVENIENCE	Takes too long to ripen	23%	26%	11%
CONVENIENCE	It has a short shelf life	21%	24%	11%
VERSATILITY	Avocados do not go with most of my meals	13%	11%	19%
MISC	I am the only one in the household who eats avocados	12%	12%	13%
EDUCATION / AWARENESS	I do not know how to store and keep avocados	11%	11%	11%
EDUCATION / AWARENESS	Still do not know many meals to prepare with them	11%	10%	13%
SENSORY	They are bland / flavourless when I eat them	10%	11%	8%
VERSATILITY	Only for special occasions	10%	10%	11%
EDUCATION / AWARENESS	I am not confident using / preparing them	10%	9%	15%
VERSATILITY	Not as versatile as other fruits / vegetables	10%	10%	9%
CONVENIENCE	Too much effort / messy to prepare	8%	7%	11%
SENSORY	The texture is different from what I expected	8%	9%	1%
MISC	They are too large to eat in one portion and would go to waste	7%	8%	3%
SENSORY	I don't like the taste	6%	4%	11%
HEALTH	Do not have as many health benefits as other fruits / vegetables	2%	2%	2%
Average		11%	11%	10%

PURCHASERS

Longer ripening duration or the converse of short shelf lives are more relevant barriers for purchasers

Implication:

Consider to have a guideline of approximating colour to required time for ripeness, or tips on prolonging shelf life as a part of information / education during in-store purchase

CONSIDERERS

They find it hard for avocados to go with their meal types, and general lack of confidence of preparing them. Taste preferences also play a part in usage barriers

Implication:

Is there a way to introduce recipes / preparation methods at POS in stores?
Could there be also be an education opportunity in pairing avocados with taste profiles in stores?

[HIDDEN] FULL BREAKDOWN – PURCHASERS VS. CONSIDERS (MALAYSIA)

Which of the following painpoints / barriers are relevant to you? – DURING USAGE

		Total Malaysia	Purchasers	Considerers
EDUCATION / AWARENESS	Still do not know many meals to prepare with them	17%	14%	27%
CONVENIENCE	It has a short shelf life	16%	18%	8%
EDUCATION / AWARENESS	I do not know how to store and keep avocados	14%	14%	15%
VERSATILITY	Avocados do not go with most of my meals	12%	10%	20%
SENSORY	They are bland / flavourless when I eat them	12%	13%	7%
MISC	I am the only one in the household who eats avocados	11%	11%	9%
CONVENIENCE	Takes too long to ripen	11%	12%	5%
SENSORY	The texture is different from what I expected	9%	10%	6%
EDUCATION / AWARENESS	I am not confident using / preparing them	8%	6%	19%
VERSATILITY	Not as versatile as other fruits / vegetables	8%	7%	9%
SENSORY	I don't like the taste	8%	6%	12%
VERSATILITY	Only for special occasions	7%	7%	7%
CONVENIENCE	Too much effort / messy to prepare	5%	6%	1%
MISC	They are too large to eat in one portion and would go to waste	4%	5%	1%
HEALTH	Do not have as many health benefits as other fruits / vegetables	2%	3%	2%
Average		10%	10%	10%

PURCHASERS

Longer ripening duration or the converse of short shelf lives are more relevant barriers for purchasers

Implication:

Consider to have a guideline of approximating colour to required time for ripeness, or tips on prolonging shelf life as a part of information / education during in-store purchase

CONSIDERERS

They find it hard for avocados to go with their meal types, or lack of knowledge of meal versatility with avocados. The general lack of confidence of preparing them and taste preferences also play a part in usage barriers

Implication:

Is there a way to introduce recipes / preparation / inspiration at POS in stores?

Could there be also be an education opportunity in pairing avocados with taste profiles in stores?

[HIDDEN] FULL BREAKDOWN – PURCHASERS VS. CONSIDERS (JAPAN)

Which of the following painpoints / barriers are relevant to you? – DURING USAGE

		Total Japan	Purchasers	Considerers
EDUCATION / AWARENESS	Still do not know many meals to prepare with them	25%	23%	31%
VERSATILITY	Not as versatile as other fruits / vegetables	15%	16%	11%
CONVENIENCE	Takes too long to ripen	14%	16%	4%
MISC	I am the only one in the household who eats avocados	12%	12%	11%
EDUCATION / AWARENESS	I do not know how to store and keep avocados	11%	12%	5%
CONVENIENCE	It has a short shelf life	10%	12%	3%
VERSATILITY	Only for special occasions	7%	6%	11%
EDUCATION / AWARENESS	I am not confident using / preparing them	5%	4%	13%
CONVENIENCE	Too much effort / messy to prepare	5%	5%	6%
SENSORY	The texture is different from what I expected	4%	5%	1%
SENSORY	They are bland / flavourless when I eat them	3%	4%	3%
VERSATILITY	Avocados do not go with most of my meals	3%	3%	4%
SENSORY	I don't like the taste	3%	2%	6%
MISC	They are too large to eat in one portion and would go to waste	2%	2%	3%
HEALTH	Do not have as many health benefits as other fruits / vegetables	1%	1%	0%
Average		8%	8%	8%

PURCHASERS

Lack of knowledge on meal versatilities is the biggest usage barrier. Longer ripening duration or the converse of short shelf lives are more relevant barriers for purchasers.

Implication:

Consider to have a guideline of approximating colour to required time for ripeness, or tips on prolonging shelf life as a part of information / education during in-store purchase

Is there a way to introduce recipes / food pairing at POS in stores?

CONSIDERERS

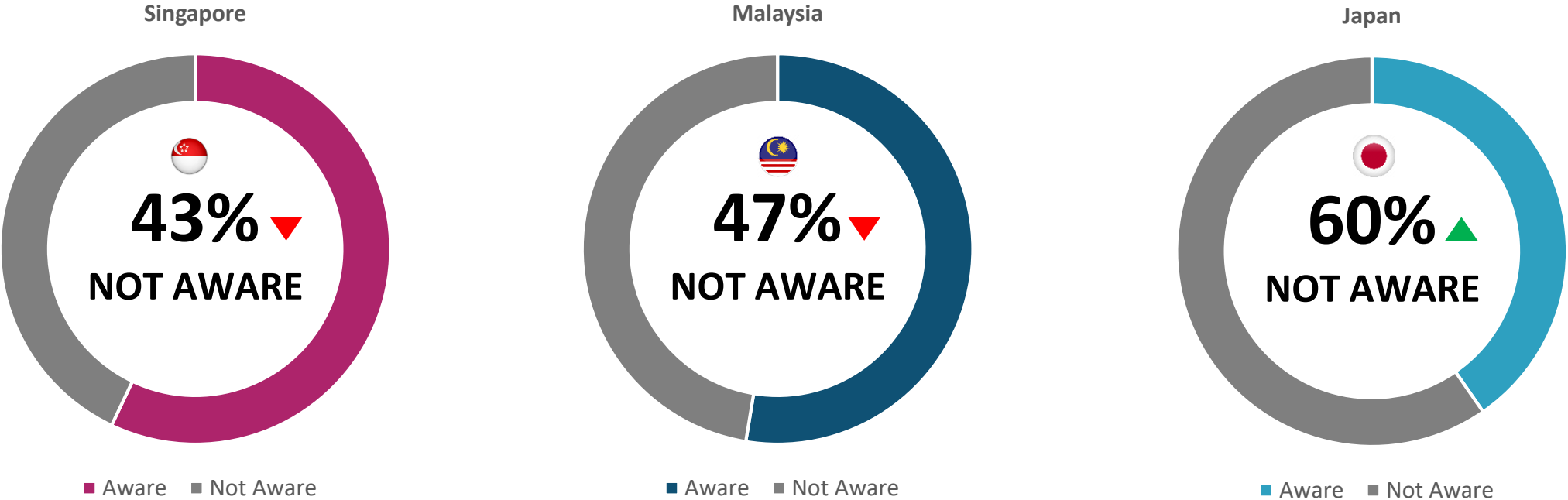
Lack of knowledge on meal versatilities is the biggest usage barrier. Considerers are tend to be setback by the general lack of confidence in preparing the

Implication:

Is there a way to introduce recipes / preparation / inspiration at POS in stores?

THERE IS STILL A SIGNIFICANT PROPORTION OF TARGET AUDIENCE WHO ARE NOT AWARE OF PROVENANCE / ORIGIN OF AVOCADOS IN THEIR STORES

Thinking about the avocados you see in your grocery store, do you know where they come from?



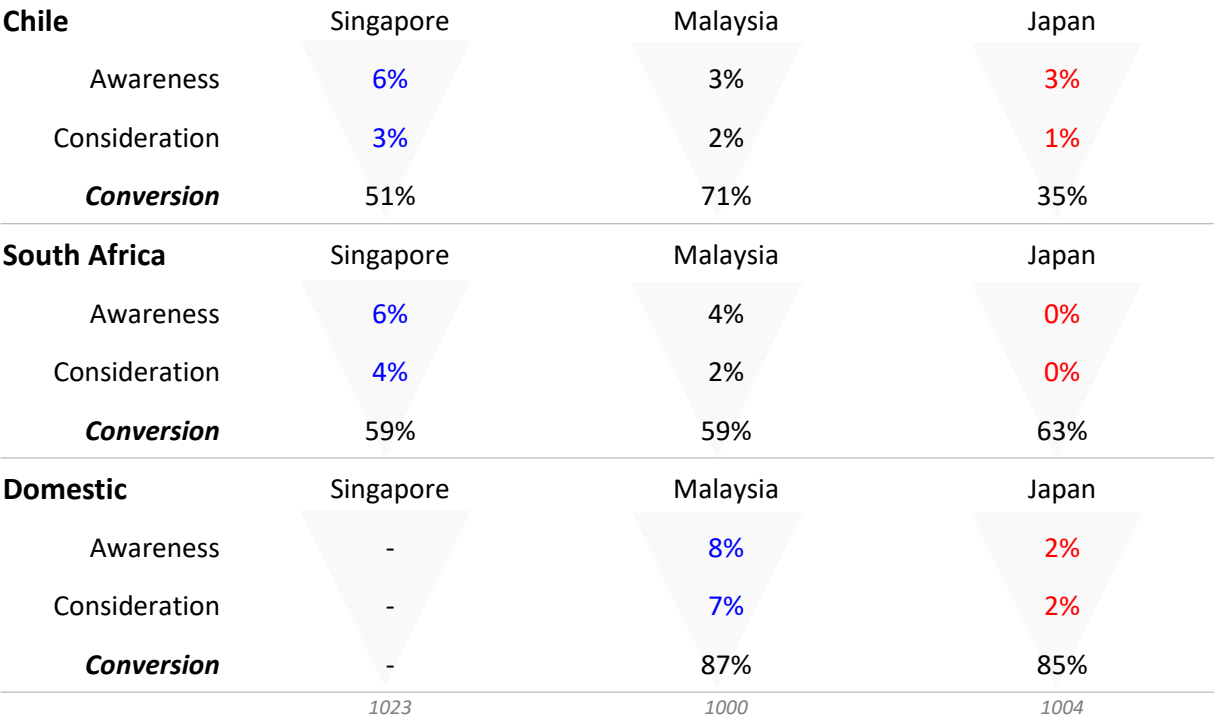
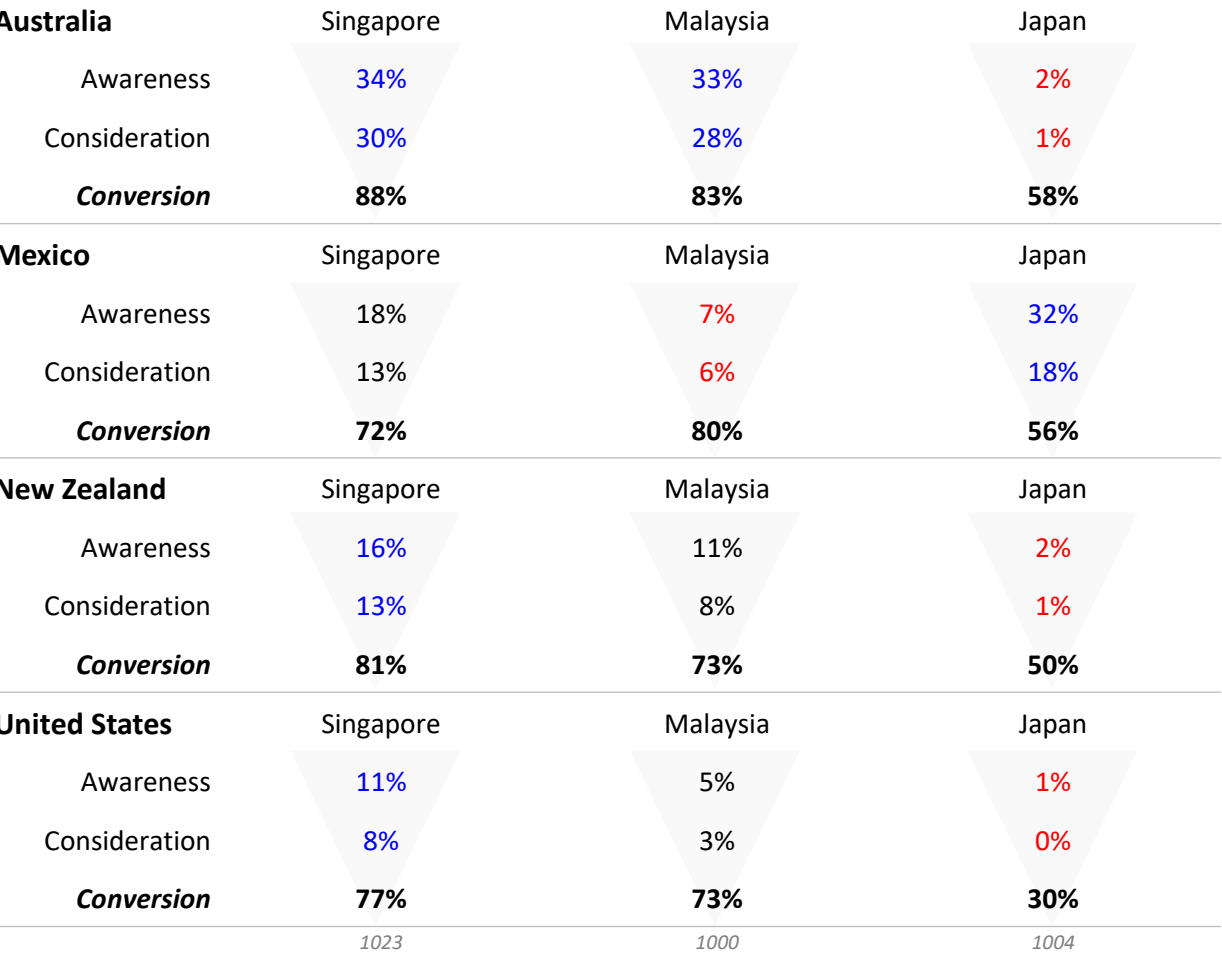
JP is the only market where levels of awareness between purchasers and considerers are significantly lower compared to SEA counterparts

AUSTRALIA HAS HIGHEST LEVEL OF AWARENESS AMONG SG & MY, WIT REFLECTING SO FOR JP

SG is aware of more importer countries than MY and JP – with higher levels of awareness / consideration for New Zealand, United States, Chile and

A lot of provenance packaging on Mexico in JP supermarkets (use images from Qual)

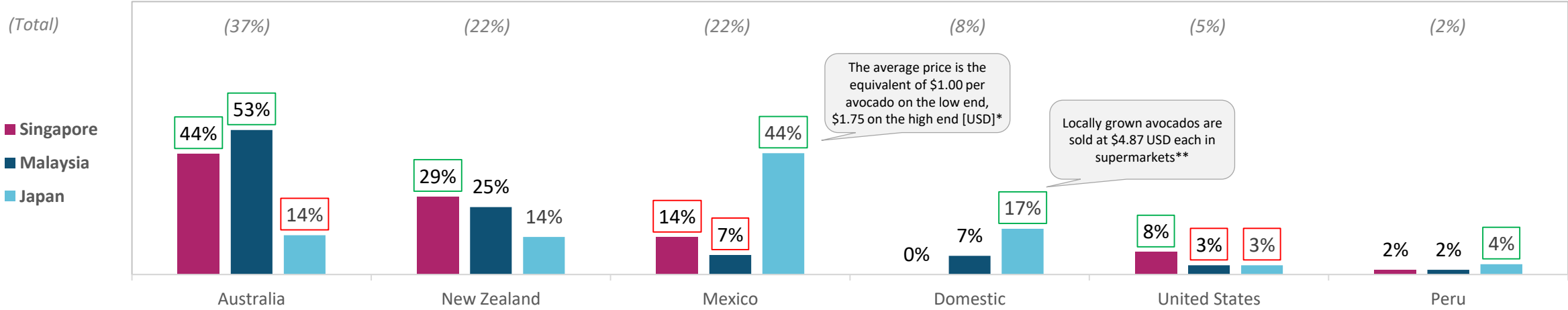
Funnel is rebased to reflect all respondents



AUSTRALIA IS MOST STRONGLY ASSOCIATED TO HIGH QUALITY AVOCADOS FOR SEA MARKETS, WHILE DOMESTIC PRODUCE COMES IN 2ND FOR JAPAN

How would you rank the quality of avocados from the following countries?

RANKING OF AVOCADO QUALITY – 1ST RANK



Observations on JP

FROM SECONDARY RESEARCH, THERE IS A STRONGER PREFERENCE FOR DOMESTIC PRODUCE DUE TO AN IMPLICIT BELIEF THAT JAPAN’S FARMED GOODS ARE THE BEST IN THE WORLD (I.E. CLIMATE / ENVIRONMENT / HARVESTATION BY GENERATIONS OF FARMERS, GROWING METHODS [I.E. ORGANIC]) THEREBY ENSURING HIGH QUALITY PRODUCE THAT CAN BE TRUSTED

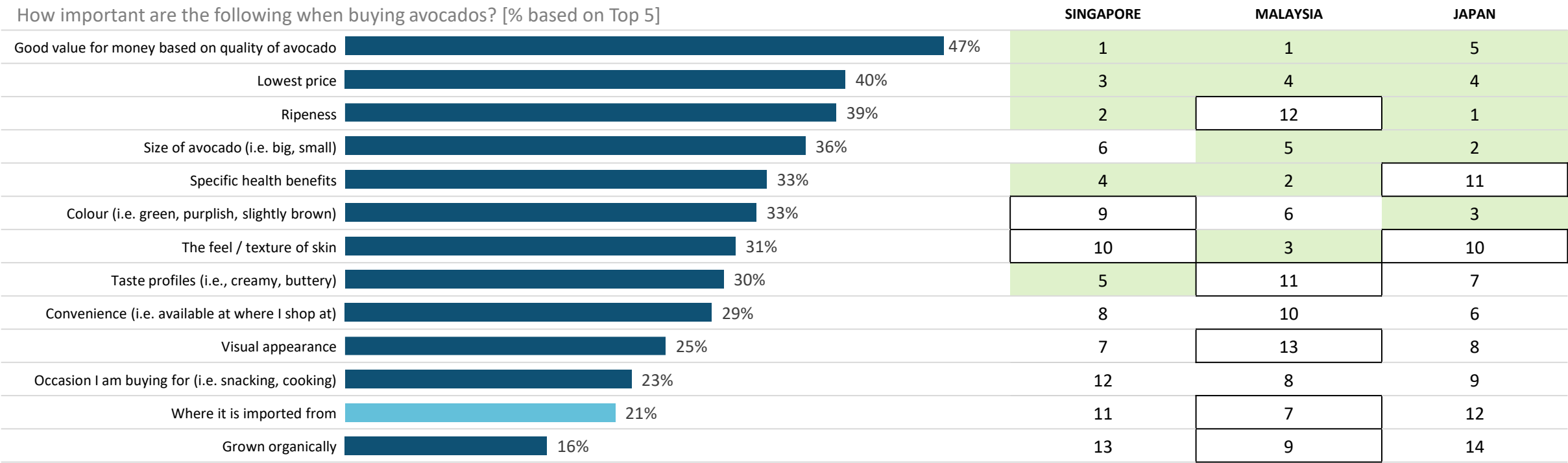
Implications

JAPANESE CONSUMERS NEED REASONS TO BELIEVE ON QUALITY – RANGING FROM PROVENANCE, EXPERTISE TO GROWING METHODS. A LEVEL OF TRUST IN QUALITY ASSURANCE MAY NEED TO BE ESTABLISHED FIRST BEFORE INDUCING CONSIDERATION & TRIAL

CONTINUING ON THE TOPIC OF QUALITY, CHOICE DRIVERS TOWARDS AVOCADO PURCHASE DIFFER BY COUNTRY

Provenance is currently not a key consideration during purchase for any of the 3 markets

Rank 1 = Most selected, Rank 19 = Least selected



Observations



Steering towards practicality in purchase – driven by visual cues of ripeness, health benefits and taste profiles – the mantra of “looks good, taste good, good for you”



Health benefits are a key driver more so than other markets, as well as textural visual cues. They pay more attention to provenance and organicity, which could be likely determinants of quality



Conversely, health is not a key driver, more so of visual cues such as ripeness, size and colour. Culturally, aesthetics are critical considerations when grocery shopping for produce in general

HIDDEN [IMPORTANT CHOICE DRIVERS] – ABSOLUTE SCORES

Rank 1 = Most selected, Rank 19 = Least selected

How important are the following when buying avocados? [% based on Top 5]

		SINGAPORE	MALAYSIA	JAPAN
Good value for money based on quality of avocado	47%	56%	51%	36%
Lowest price	40%	41%	41%	37%
Ripeness	39%	44%	17%	56%
Size of avocado (i.e. big, small)	36%	32%	37%	41%
Specific health benefits	33%	36%	45%	19%
Colour (i.e. green, purplish, slightly brown)	33%	28%	33%	37%
The feel / texture of skin	31%	26%	44%	23%
Taste profiles (i.e., creamy, buttery)	30%	35%	23%	33%
Convenience (i.e. available at where I shop at)	29%	29%	25%	33%
Visual appearance	25%	30%	16%	30%
Occasion I am buying for (i.e. snacking, cooking)	23%	16%	26%	26%
Where it is imported from	21%	24%	26%	14%
Grown organically	16%	15%	25%	8%

WITHIN PURCHASERS AND CONSIDERERS, THERE ARE OVERLAPS AND UNIQUE DIFFERENCES

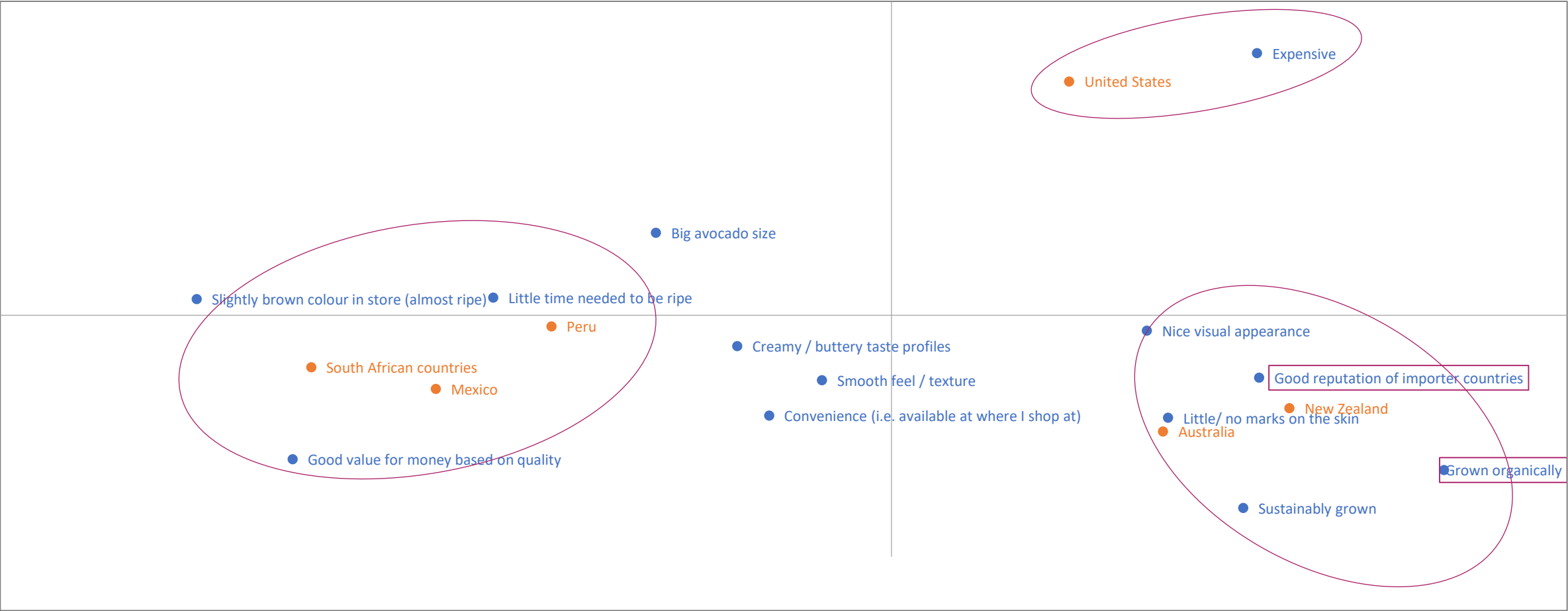
Across markets, considerers tend to be driven by occasion as a choice for choosing avocado, more so than physical / tangibles of the product

Ranking of Choice Drivers	Singapore			Malaysia			Japan		
	PURCHASERS	CONSIDERERS	DIFF	PURCHASERS	CONSIDERERS	DIFF	PURCHASERS	CONSIDERERS	DIFF
Good value for money based on quality of avocado	1	1	-	1	1	-	5	2	+3
Lowest price	3	2	+1	4	3	+1	4	3	+1
Ripeness	2	3	-1	12	13	-1	1	1	-
Size of avocado (i.e. big, small)	6	10	-4	5	5	-	2	7	-5
Specific health benefits	4	4	0	2	4	-2	11	10	+1
Colour (i.e. green, purplish, slightly brown)	7	12	-5	6	6	0	3	8	-5
The feel / texture	10	8	+2	3	2	+1	10	11	-1
Taste profiles (i.e., creamy, buttery)	5	5	0	11	9	+2	7	4	+3
Convenience (i.e. available at where I shop at)	9	7	+2	10	7	+3	6	6	-
Visual appearance	8	6	+2	15	12	+3	8	9	-1
Occasion I am buying for (i.e. snacking, cooking)	14	9	+5	9	8	+1	9	5	+4
Where it is imported from	11	11	0	7	10	-3	12	12	-
Top 5 choice drivers are rather aligned between the 2 groups.				Top 5 choice drivers rather aligned between the 2 groups			Overall consistent choice drivers		
Considerers are less likely to be driven by tangible factors (i.e. size / colour), more so by occasion				Considerers tend to more driven by visual appearance and convenience			Considerers tend to be driven by occasion-based and taste profile as opposed to product-related drivers (size / colour)		

SG : WE SEE CONNOTATIONS OF AU COMING THROUGH IN AVOCADO ASSOCIATION— ORGANICITY, SUSTAINABILITY AND GOOD REPUTATION—

NZ is also in the same mind space as AU, while Mexico/Peru/South African pulls apart in terms of VFM and riper, and US is known for being expensive

Which of the statements below would you associate with the avocados from countries shown?



AUSTRALIA’S AVOCADOS HAVE A STRONGER ASSOCIATION TO INTANGIBLE CHOICE DRIVERS (I.E. ORGANIC / SUSTAINABLE GROWING METHODS, GOOD REPUTATION)

NZ is also associated to the same elements, with some differences i.e. ripening time / convenience
 South American & Africa markets are perceived to be cheaper and riper
 On the other hand, US is regarded as highly expensive

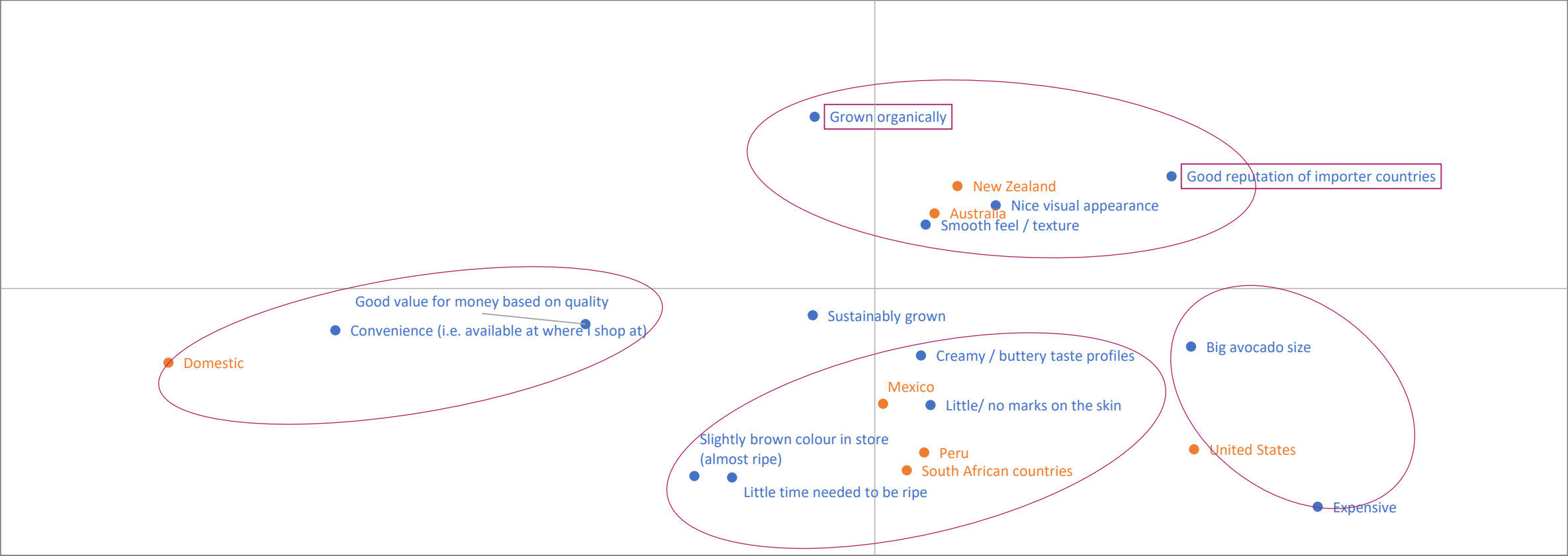
In descending order of Singapore’s choice drivers (Most to least important)	Absolute Percentages					
	Australia	New Zealand	Mexico	Peru	United States	South African
Good value for money based on quality	50%	43%	40%	29%	26%	31%
Little time needed to be ripe	42%	32%	34%	22%	29%	21%
Expensive	61%	57%	34%	31%	59%	26%
Creamy / buttery taste profiles	64%	55%	44%	36%	40%	30%
Big avocado size	50%	42%	39%	22%	39%	28%
Nice visual appearance	66%	59%	41%	29%	42%	25%
Convenience (i.e. available at where I shop at)	60%	46%	38%	26%	32%	28%
Slightly brown colour in store (almost ripe)	43%	36%	38%	29%	31%	28%
Smooth feel / texture	63%	52%	41%	31%	36%	28%
Grown organically	55%	45%	26%	19%	26%	17%
Little/ no marks on the skin	50%	44%	28%	20%	27%	20%
Sustainably grown	56%	50%	31%	22%	25%	20%
Good reputation of importer countries	68%	61%	38%	27%	40%	25%

Normalised Scores:					
Australia	New Zealand	Mexico	Peru	United States	South African
-4.2	-3.4	5.4	3.1	-7.7	6.7
-2.2	-6.1	4.7	1.2	1.0	1.3
-5.0	0.2	-9.2	0.1	18.0	-4.1
-2.7	-1.5	1.2	4.4	-1.3	-0.1
-4.5	-4.5	3.7	-3.3	5.4	3.2
1.2	3.7	-1.3	-1.2	1.9	-4.4
3.4	-2.7	0.7	-0.7	-3.5	2.7
-7.6	-7.3	5.4	4.8	-0.6	5.3
0.9	-1.1	1.0	1.6	-2.2	-0.1
8.3	5.5	-4.1	-3.2	-3.0	-3.5
3.2	4.1	-2.3	-2.1	-2.0	-0.9
5.1	7.1	-1.8	-1.8	-6.0	-2.6
4.0	6.0	-3.2	-3.0	-0.1	-3.7

MY : WE SEE SIMILAR ASSOCIATIONS AS THE SG MARKET, WITH THE EXCEPTION OF DOMESTICALLY PRODUCED AVOCADOS THAT IS TIED TO CONVENIENCE AND VALUE FOR MONEY

NZ is also in the same mind space as AU, while Mexico/Peru/South African pulls apart in terms of VFM, ripeness and taste profile, and US is known for being expensive

Which of the statements below would you associate with the avocados from countries shown?



SIMILAR TO SG, AUSTRALIAN AVOCADOS HAVE A GOOD REPUTATION, AND PERCEIVED TO HAVE A NICE VISUAL APPERANCE WITH SMOOTH TEXTURE

NZ pulls apart from AU in terms of organicity
US is regarded as highly expensive, similar to SG
Domestic produce is extremely convenient and highly affordable, thereby registering a stronger VFM association

*In descending order of Malaysia’s choice drivers
(Most to least important)*

	Absolute Percentages						
	Australia	New Zealand	Mexico	Peru	United States	South African	Domestic (MY)
Good value for money based on quality	62%	49%	31%	24%	28%	28%	35%
Smooth feel / texture	71%	61%	32%	26%	35%	29%	25%
Expensive	68%	59%	32%	31%	60%	35%	16%
Big avocado size	64%	52%	30%	26%	38%	30%	14%
Slightly brown colour in store (almost ripe)	53%	45%	31%	26%	29%	31%	29%
Grown organically	62%	60%	26%	20%	31%	24%	27%
Convenience (i.e. available at where I shop at)	57%	46%	24%	21%	28%	26%	43%
Creamy / buttery taste profiles	71%	57%	37%	31%	39%	30%	27%
Little time needed to be ripe	55%	50%	31%	30%	34%	30%	31%
Nice visual appearance	69%	61%	30%	27%	36%	27%	22%
Little/ no marks on the skin	51%	46%	28%	25%	32%	25%	21%
Good reputation of importer countries	74%	63%	28%	26%	42%	28%	17%
Sustainably grown	61%	52%	29%	31%	32%	23%	27%

Normalised Scores:

Australia	New Zealand	Mexico	Peru	United States	South African	Domestic (MY)
1.0	-4.1	1.6	-2.0	-6.7	0.7	9.4
3.9	3.4	0.4	-1.9	-2.7	-0.7	-2.3
-4.4	-2.8	-2.1	0.3	19.3	2.9	-13.2
3.2	-0.3	0.8	0.8	3.4	2.8	-10.7
-5.1	-5.0	3.1	1.3	-4.5	5.1	5.2
2.4	8.6	-2.6	-4.5	-3.0	-3.3	2.5
-1.8	-4.3	-4.1	-3.3	-5.1	-0.7	19.3
1.3	-3.0	3.8	1.4	-0.2	-1.4	-1.8
-7.5	-3.5	1.0	3.6	-1.3	2.1	5.6
3.7	5.3	-1.0	-0.4	-1.1	-2.0	-4.5
-3.6	-0.5	2.5	1.7	0.8	0.5	-1.4
7.3	6.3	-3.5	-2.0	3.9	-1.8	-10.1
-0.3	0.0	0.1	4.9	-2.7	-4.1	2.2

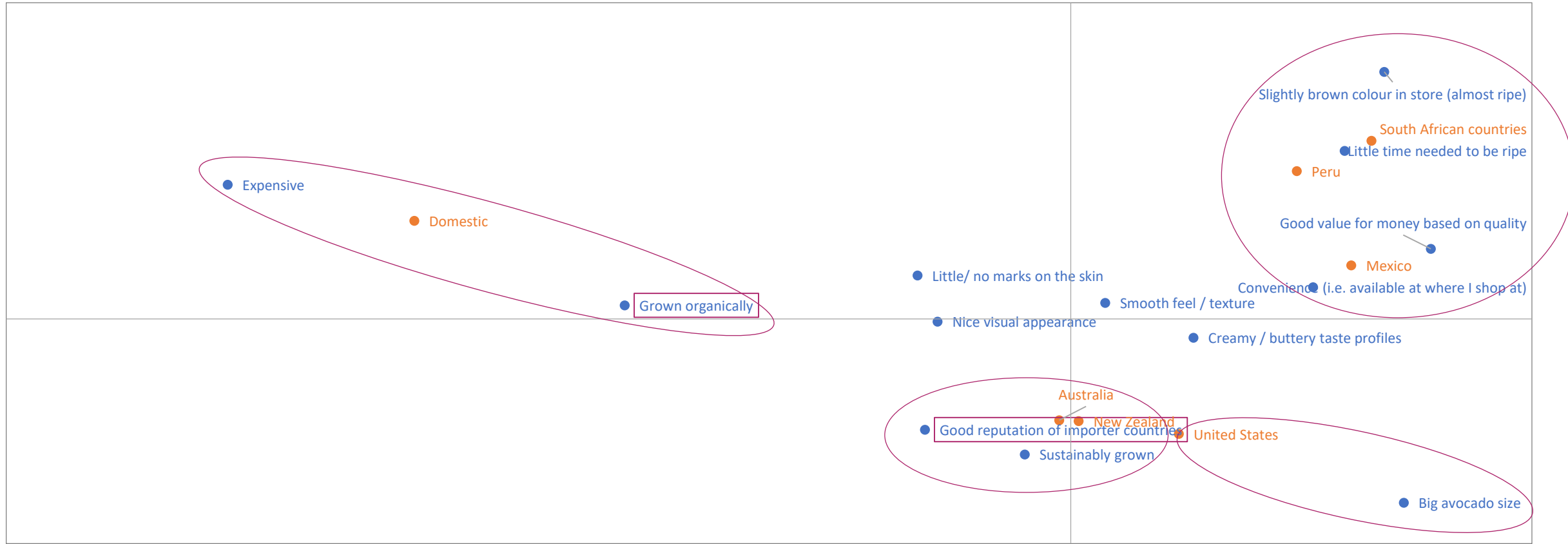
How to read:

Above 4.9 (Dark Green) – Stronger associations to the country
-4.9 to 4.9 (Lighter Orange / Yellow / Lighter Green) – Moderate associations to the country
Less than -4.9 (Darker Orange) – Weaker associations to the country

JP : IT IS APPARENT THAT NO COUNTRIES ARE CURRENTLY OWNING SENSORIAL / AESTHETICS SPACES. SIMILAR TO SEA, AU & NZ CARRIES REPUTATION AND SUSTAINABLE GROWING METHODS

South America (Mexico, Peru) pulls apart in convenience and VFM, while United States is thought to be associated to big avocado sizes. Domestic produce is seen to be expensive and organic

Which of the statements below would you associate with the avocados from countries shown?



THERE IS AN UNTAPPED SPACE FOR AUSTRALIA TO BUILD ITS POSITIONING IN JP

Mexico is strongly associated to convenience given its higher market share and availability, as well as affordability
On the contrary, while domestic produce is strongly associated to organicity and price, it falls behind on critical visual drivers (i.e. size, colour) and taste

*In descending order of Japan's choice drivers
(Most to least important)*

	Absolute Percentages						
	Australia	New Zealand	Mexico	Peru	United States	South African	Domestic (JP)
Little time needed to be ripe	16%	18%	31%	20%	16%	22%	13%
Big avocado size	26%	24%	34%	15%	34%	22%	7%
Slightly brown colour in store (almost ripe)	18%	18%	37%	21%	16%	29%	14%
Expensive	17%	17%	10%	8%	16%	7%	65%
Good value for money based on quality	26%	32%	49%	30%	25%	29%	11%
Convenience (i.e. available at where I shop at)	25%	29%	57%	23%	24%	20%	20%
Creamy / buttery taste profiles	33%	36%	45%	27%	30%	26%	28%
Nice visual appearance	30%	32%	35%	18%	24%	20%	43%
Smooth feel / texture	26%	28%	37%	18%	18%	18%	27%
Grown organically	23%	24%	14%	12%	13%	10%	43%
Little/ no marks on the skin	16%	16%	21%	12%	14%	9%	26%
Good reputation of importer countries	30%	34%	32%	13%	17%	13%	35%
Sustainably grown	21%	24%	21%	13%	19%	11%	22%

Normalised Scores:						
Australia	New Zealand	Mexico	Peru	United States	South African	Domestic (JP)
-3.3	-3.1	4.3	5.3	-0.7	6.8	-9.4
2.5	-0.6	2.4	-2.6	13.8	3.9	-19.4
-4.3	-5.7	6.6	4.7	-2.6	12.5	-11.2
-2.9	-4.9	-17.3	-7.2	-1.4	-8.1	41.8
-2.5	0.3	9.2	8.5	-0.3	6.8	-22.0
-3.1	-2.0	18.0	1.9	-0.5	-1.5	-12.9
1.5	1.2	0.5	2.6	2.1	1.0	-9.0
1.4	1.2	-4.9	-3.5	-1.2	-2.4	9.4
0.8	1.8	3.0	-0.2	-3.4	-1.0	-1.1
3.0	2.0	-13.1	-2.7	-4.2	-5.1	20.2
-0.7	-1.8	-1.6	0.2	0.2	-3.2	6.9
4.9	7.8	-2.1	-5.7	-4.8	-6.4	6.4
2.6	3.9	-5.0	-1.3	2.9	-3.3	0.2

How to read:

Above 8.1 (Dark Green) – Stronger associations to the country

-8.1 to 8.1 (Lighter Orange / Yellow / Lighter Green) – Moderate associations to the country

Less than -8.1 (Darker Orange) – Weaker associations to the country

JOBS TO BE DONE FOR SINGAPORE:



Singapore

 GROWTH OPPORTUNITY	<i>Opportunity to drive frequency amongst monthly / less than monthly purchasers</i> <i>Opportunity to drive trial amongst considerers</i>
 PROVENANCE	<i>Across all markets, most of them are unaware of where the avocados in the stores come from, and origin is not a key consideration for them.</i> Good practice to include provenance at POS due to unconscious association of Australian to quality produce for SG & MY. In JP, suggest to do the same provenance prompts for Australia as per Mexican avocados
 COMMUNICATION (ASSOCIATION TO AVOCADOS)	<i>Stronger avocado associations: Fancy, satisfying</i> Avocado as an all-rounder ingredient that fulfils and elevates a dish
 IN-STORE DISPLAY (CHOICE DRIVERS DURING PURCHASE)	<i>Rank : Ripeness #2, Taste profiles #5</i> Ripeness and taste profiles are critical choice drivers – think about POS guides (colour scale / physical touch test)
 EDUCATION (OVERCOMING BARRIERS)	<i>Both demonstrate more varied uses of avocados but approximately 50% experience usage painpoints in the lack of education / awareness (i.e. storage, selection) and versatility. Avocado's health benefits is a top purchase reason</i> Look into increasing frequencies of purchase by providing versatile daypart / occasion recipes. Consider including specific health benefits given health as a key need; tips on storage and prep
 QUALITY OF AVOCADOS	<i>Australia #1 quality importer Taste profiles #5 rank on driver</i> Reinforce on current strong reputation of quality fresh produce and draw it to avocados, as well as the parallel reassurance of great quality with great taste.

JOBS TO BE DONE FOR MALAYSIA:



 GROWTH OPPORTUNITY	<i>Opportunity to drive frequency amongst monthly / less than monthly purchasers</i> <i>Opportunity to drive trial amongst considerers</i>
 PROVENANCE	<i>Across all markets, most of them are unaware of where the avocados in the stores come from, and origin is not a key consideration for them.</i> Good practice to include provenance at POS due to unconscious association of Australian to quality produce for SG & MY. In JP, suggest to do the same provenance prompts for Australia as per Mexican avocados
 COMMUNICATION (ASSOCIATION TO AVOCADOS)	<i>Stronger avocado associations: Fun, proud, fresh, iconic</i> Emotional elements that creates excitement, uniqueness and dial up on freshness as quality
 IN-STORE DISPLAY (CHOICE DRIVERS DURING PURCHASE)	<i>Rank : Feel / texture #2, Size #5</i> Consumers rely on sense of touch to determine feel / texture of the skin, and size – think about POS guides (textural)
 EDUCATION (OVERCOMING BARRIERS)	<i>Both demonstrate more varied uses of avocados but approximately 50% experience usage painpoints in the lack of education / awareness (i.e. storage, selection) and versatility. Avocado's health benefits is a top purchase reason</i> Look into increasing frequencies of purchase by providing versatile daypart / occasion recipes. Consider including specific health benefits given health as a key need; tips on storage and prep
 QUALITY OF AVOCADOS	<i>Australia #1 quality importer Heightened sensory painpoints during usage</i> Reinforce on current strong reputation of quality fresh produce and draw it to avocados, as well as the parallel reassurance of great quality with great taste.

JOBS TO BE DONE FOR JAPAN:



Japan

	GROWTH OPPORTUNITY	<i>Opportunity to increase category awareness / penetration</i>
	PROVENANCE	<i>Across all markets, most of them are unaware of where the avocados in the stores come from, and origin is not a key consideration for them.</i> Good practice to include provenance at POS due to unconscious association of Australian to quality produce for SG & MY. In JP, suggest to do the same provenance prompts for Australia as per Mexican avocados
	COMMUNICATION (ASSOCIATION TO AVOCADOS)	<i>Stronger avocado associations: Creamy, tasty, popular taste/texture and satisfy taste craving are top purchase reasons</i> Focus on sensorial elements that helps envision the texture and taste given that these are key reasons of purchase
	IN-STORE DISPLAY (CHOICE DRIVERS DURING PURCHASE)	<i>Rank : Ripeness #1, Size #2, Colour #3</i> Ripeness, size and colour are top choice drivers – think about using POS guides (i.e. colour scale / touch test to estimate ripeness duration)
	EDUCATION (OVERCOMING BARRIERS)	<i>Less complexity and simpler uses of due to a lack of awareness and uncertainty of avocado selection and preparation</i> Consider reducing barriers to purchase via fundamental how-tos: choosing / preparing / pairing (recipes) for key daypart menus
	QUALITY OF AVOCADOS	<i>Mexico #1 quality importer, Domestic produce #2</i> Establish references to high quality local produce (i.e. provenance, expertise, climate & environment, organicity)



CATEGORY LANDSCAPE

DRIVERS & BARRIERS

WHO IS OUR BULLSEYE AUDIENCE?

KEY CONSUMER QUESTIONS

TERRITORY EVALUATION

5WS ACTIVATION OPPORTUNITIES

THE MAJORITY OF AVOCADO PURCHASE VOLUME IS COMING FROM 25-44 YEAR OLDS IN SG & MY, WHICH IS DRIVEN BY THE HIGHER LEVELS OF BUYING WEEKLY

On the other hand, for JP it is evident that the majority purchases less often, and age groups does not pull apart clearly. Avocado volumes across age groups do not pull apart clearly too

		Singapore 🇸🇬				Malaysia 🇲🇾				Japan 🇯🇵			
		Weekly or more	Fortnightly	Monthly	Less often	Weekly or more	Fortnightly	Monthly	Less often	Weekly or more	Fortnightly	Monthly	Less often
AGE ACROSS AVOCADO PURCHASE FREQUENCY	18-24	4%	1%	2%	3%	6%	4%	3%	5%	2%	1%	1%	4%
	25-34	10%	3%	3%	3%	14%	6%	6%	9%	3%	3%	5%	9%
	35-44	12%	3%	3%	6%	8%	3%	3%	4%	4%	3%	6%	9%
	45-54	8%	4%	3%	6%	5%	3%	2%	5%	5%	5%	7%	11%
	55-65	9%	6%	4%	6%	3%	2%	2%	5%	4%	5%	5%	7%
OVERLAYED WITH ANNUAL AVOCADO VOLUME	18-24	496.6	85.8	43.3	1.1	499.8	104.7	46.8	1.0	164.7	54.5	17.4	0.4
	25-34	525.0	98.5	40.6	0.9	564.8	110.6	51.4	0.9	136.4	39.0	16.7	0.4
	35-44	499.9	119.9	41.9	0.9	543.8	102.4	53.8	0.9	191.3	49.1	19.5	0.4
	45-54	373.8	94.7	45.2	1.0	491.2	104.5	48.8	0.8	139.2	48.6	18.0	0.5
	55-65	321.2	110.7	46.3	1.0	374.9	105.8	47.7	0.8	173.2	45.4	23.5	0.5
		354	143	132	198	290	157	129	231	148	156	206	338
WHAT AGE GROUPS?		25-44 years old				25-44 years old				Cannot be defined clearly			

FOR SG / MY, YOUNG FAMILIES MAKE UP A SIGNIFICANT PROPORTION OF WEEKLY OR MORE PURCHASERS

However, for JP there seems to be no clear indicator of lifestage that stand out in terms of purchase frequency

LIFESTAGE ACROSS AVOCADO PURCHASE FREQUENCY	Singapore 				Malaysia 				Japan 			
	Weekly or more	Fortnightly	Monthly	Less often	Weekly or more	Fortnightly	Monthly	Less often	Weekly or more	Fortnightly	Monthly	Less often
Young SINKs/DINKs	5%	2%	3%	3%	8%	4%	4%	8%	2%	2%	2%	6%
Mid SINKs/DINKs	5%	3%	3%	6%	4%	3%	3%	4%	3%	3%	5%	10%
Older SINKs/DINKs	4%	3%	2%	2%	0%	1%	0%	2%	1%	2%	2%	3%
Young Family	15%	2%	3%	5%	11%	4%	4%	5%	3%	3%	6%	10%
Older Family	8%	4%	3%	6%	5%	3%	2%	3%	4%	5%	5%	7%
Empty Nester	6%	3%	2%	2%	8%	5%	3%	6%	3%	3%	4%	5%
	354	143	132	198	290	157	129	231	148	156	206	338

23% of young family who purchase avocados weekly or more are 25-34, while 50% of them are 35-44

35% of young family who purchase avocados weekly or more are 25-34, while 39% of them are 35-44

WHAT LIFESTAGE?	Young Family (25-44 Y/O parents living with kids aged under 12)	Young Family (25-44 Y/O parents living with kids aged under 12)	Cannot be defined clearly
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FOR SINGAPORE AND MALAYSIA, MIDDLE TO HIGH MHI HOUSEHOLDS MAKE UP AT LEAST 3/4 OF WEEKLY PURCHASES, AND PURCHASE VOLUMES ARE ALMOST ON PAR FOR MY

While JP reflects the same insight of mid-to-high MHI households, however, purchase volume across income bands seem to be inverted with lower income households having the highest annual avocado volume

Make
clear

		Singapore 				Malaysia 				Japan 			
INCOME ACROSS AVOCADO PURCHASE FREQUENCY		Weekly or more	Fortnightly	Monthly	Less often	Weekly or more	Fortnightly	Monthly	Less often	Weekly or more	Fortnightly	Monthly	Less often
LOW		21%	20%	34%	36%	27%	26%	21%	30%	28%	37%	33%	36%
MID		56%	59%	48%	50%	45%	48%	54%	45%	45%	34%	38%	38%
HIGH		24%	20%	19%	14%	27%	26%	24%	25%	27%	29%	29%	26%
OVERLAYED WITH ANNUAL AVOCADO VOLUME													
LOW		386.1	98.9	40.0	0.8	503.1	102.9	50.6	0.7	199.2	48.3	18.2	0.3
MID		417.1	103.3	43.7	1.1	528.3	94.8	49.7	1.0	138.4	44.1	19.6	0.4
HIGH		583.4	117.1	48.9	1.0	530.6	132.6	51.9	0.9	155.7	46.9	20.3	0.6
WHAT INCOME?		Mid to high MHI – Above SGD 6,000				Mid to high MHI – Above RM 4,000				Cannot be defined clearly			

THERE ARE DISTINCT DIFFERENCES BETWEEN WEEKLY & INFREQUENT PURCHASERS

Singapore & Malaysia cares about where their food comes from, using quality / exotic ingredients to elevate their meals. They love to cook and also impress others with it. In addition, they love to experiment with ingredients and be creative with food. Japan is focused on provenance of food / premium ingredients

Singapore 					Malaysia 					Japan 				
	Weekly or more	Fortnightly	Monthly	Less often		Weekly or more	Fortnightly	Monthly	Less often		Weekly or more	Fortnightly	Monthly	Less often
Seeking meaning from food	94%	95%	91%	95%		96%	93%	98%	96%		95%	95%	91%	91%
Health conscious/healthy living	96%	94%	92%	93%		96%	97%	100%	97%		93%	94%	91%	89%
Joy through cooking	86%	79%	73%	72%		92%	86%	87%	81%		80%	81%	81%	79%
Provenance/premium	89%	79%	77%	71%		95%	91%	92%	89%		84%	73%	72%	69%
Experimentation/versatility	96%	92%	91%	88%		98%	97%	97%	97%		94%	91%	92%	89%

WHICH ATTITUDES?

Loves experimenting / creativity with food

Finds joy through cooking for others / impress others with

Cares about provenance / premium ingredients / using quality or exotic ingredients to elevate meals

Cares about provenance / premium ingredients / using quality or exotic ingredients to elevate meals

Loves experimenting / creativity with food

Cares about provenance / premium ingredients / using quality or exotic ingredients to elevate meals



HIDDEN - GENERAL ATTITUDES ACROSS AVOCADO PURCHASE FREQUENCY - SINGAPORE

		Weekly or more	Fortnightly	Monthly	Less Often
Health Conscious / Healthy Living	I care a lot about the quality of food that I consume	86%	81%	73%	68%
Seeking Meaning Through Food	Having a balanced diet with varied nutrients is to key to healthy living	85%	91%	85%	88%
Health Conscious / Healthy Living	I invest in my health by eating fresh produce as much as I can	84%	72%	71%	70%
Seeking Meaning Through Food	I believe that the best food comes from having the best conditions for it to grow in	83%	78%	72%	74%
Seeking Meaning Through Food	Food plays an important role in creating memorable experiences in life	83%	81%	74%	73%
Health Conscious / Healthy Living	I try to be efficient with my food and pack as much goodness in as I can	82%	77%	73%	68%
Joy through cooking	I like to prepare meals that I / family / friends enjoy	81%	77%	70%	70%
Health Conscious / Healthy Living	I tend to purchase fruits / vegetables that contains specific health nutrients	80%	74%	64%	62%
Experimentation / Versatility	I like to purchase food that goes well with many pairings	80%	75%	70%	64%
Experimentation / Versatility	I enjoy learning new recipes / new ways of food pairing	79%	63%	65%	66%
Experimentation / Versatility	I like to cook with food that elevates my dish	78%	67%	62%	61%
Experimentation / Versatility	I enjoy discovering new cultures through food	77%	66%	67%	61%
Health Conscious / Healthy Living	I look to supplements / vitamins to boost my health	77%	68%	60%	53%
Experimentation / Versatility	I like to experiment with different ingredients	77%	68%	57%	52%
Experimentation / Versatility	I like to recreate foods that I've eaten in places I've travelled to/ places I'd like to visit	76%	67%	55%	50%
Experimentation / Versatility	I enjoy being creative with food	76%	63%	62%	57%
Provenance / Premium	I like to indulge myself with using premium ingredients in my meals	74%	64%	52%	46%
Provenance / Premium	It matters to me where my produce comes from	74%	59%	56%	51%
Joy through cooking	I love to impress friends / family with my cooking	65%	42%	36%	39%
Provenance / Premium	I like to use foods from exotic places to improve my meals	63%	46%	38%	30%



HIDDEN - GENERAL ATTITUDES ACROSS AVOCADO PURCHASE FREQUENCY - MALAYSIA

Note – link this to platforms – its about experimenting and this aligns with LEVEL UP

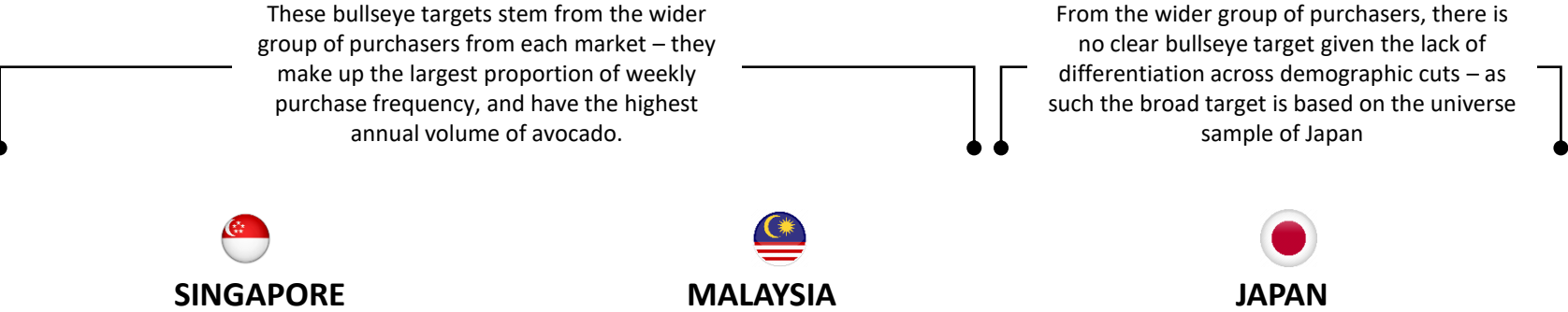
		Weekly or more	Fortnightly	Monthly	Less Often
Seeking Meaning Through Food	Having a balanced diet with varied nutrients is to key to healthy living	89%	84%	92%	87%
Seeking Meaning Through Food	I believe that the best food comes from having the best conditions for it to grow in	89%	83%	87%	81%
Health Conscious / Healthy Living	I invest in my health by eating fresh produce as much as I can	87%	82%	86%	80%
Seeking Meaning Through Food	Food plays an important role in creating memorable experiences in life	87%	80%	90%	83%
Experimentation / Versatility	I like to cook with food that elevates my dish	87%	80%	79%	77%
Experimentation / Versatility	I enjoy discovering new cultures through food	87%	78%	83%	71%
Health Conscious / Healthy Living	I tend to purchase fruits / vegetables that contains specific health nutrients	87%	84%	88%	81%
Health Conscious / Healthy Living	I care a lot about the quality of food that I consume	87%	86%	89%	80%
Provenance / Premium	It matters to me where my produce comes from	86%	72%	80%	78%
Health Conscious / Healthy Living	I try to be efficient with my food and pack as much goodness in as I can	86%	87%	92%	77%
Joy through cooking	I like to prepare meals that I / family / friends enjoy	86%	80%	80%	75%
Experimentation / Versatility	I enjoy being creative with food	85%	84%	87%	71%
Experimentation / Versatility	I like to purchase food that goes well with many pairings	85%	82%	85%	75%
Experimentation / Versatility	I enjoy learning new recipes / new ways of food pairing	85%	83%	85%	76%
Health Conscious / Healthy Living	I look to supplements / vitamins to boost my health	84%	80%	86%	74%
Experimentation / Versatility	I like to recreate foods that I've eaten in places I've travelled to/ places I'd like to visit	83%	75%	83%	71%
Provenance / Premium	I like to indulge myself with using premium ingredients in my meals	80%	74%	75%	64%
Joy through cooking	I love to impress friends / family with my cooking	80%	69%	71%	60%
Experimentation / Versatility	I like to experiment with different ingredients	78%	77%	79%	67%
Provenance / Premium	I like to use foods from exotic places to improve my meals	77%	70%	69%	58%



HIDDEN - GENERAL ATTITUDES ACROSS AVOCADO PURCHASE FREQUENCY - JAPAN

		Weekly or more	Fortnightly	Monthly	Less Often
Seeking Meaning Through Food	Having a balanced diet with varied nutrients is to key to healthy living	87%	89%	85%	85%
Health Conscious / Healthy Living	I invest in my health by eating fresh produce as much as I can	78%	79%	67%	69%
Joy through cooking	I like to prepare meals that I / family / friends enjoy	77%	77%	76%	76%
Health Conscious / Healthy Living	I tend to purchase fruits / vegetables that contains specific health nutrients	73%	74%	59%	60%
Seeking Meaning Through Food	Food plays an important role in creating memorable experiences in life	73%	66%	61%	68%
Experimentation / Versatility	I enjoy learning new recipes / new ways of food pairing	72%	73%	71%	67%
Experimentation / Versatility	I like to purchase food that goes well with many pairings	70%	69%	68%	67%
Health Conscious / Healthy Living	I care a lot about the quality of food that I consume	70%	57%	58%	53%
Health Conscious / Healthy Living	I try to be efficient with my food and pack as much goodness in as I can	70%	61%	59%	58%
Seeking Meaning Through Food	I believe that the best food comes from having the best conditions for it to grow in	68%	66%	63%	62%
Experimentation / Versatility	I enjoy discovering new cultures through food	67%	66%	61%	55%
Provenance / Premium	It matters to me where my produce comes from	67%	54%	58%	55%
Experimentation / Versatility	I like to cook with food that elevates my dish	66%	61%	51%	57%
Joy through cooking	I love to impress friends / family with my cooking	66%	59%	58%	59%
Experimentation / Versatility	I enjoy being creative with food	63%	57%	52%	49%
Experimentation / Versatility	I like to recreate foods that I've eaten in places I've travelled to/ places I'd like to visit	61%	64%	56%	55%
Experimentation / Versatility	I like to experiment with different ingredients	52%	56%	50%	46%
Provenance / Premium	I like to use foods from exotic places to improve my meals	49%	36%	32%	30%
Provenance / Premium	I like to indulge myself with using premium ingredients in my meals	46%	35%	33%	33%
Health Conscious / Healthy Living	I look to supplements / vitamins to boost my health	43%	48%	40%	40%

OUR BULLSEYE TARGET AUDIENCE IS:



Unisex, 25- 44, parents with young kids (12 years of age or less, and belong to mid / high household income groups

-
- Loves experimenting / creativity with food
- Finds joy through cooking for others / impress others with
- Cares about provenance / premium ingredients / using quality or exotic ingredients to elevate meals

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Target audience is hard to define, given that it is still an immature market and job to be done is more of category awareness, driving consideration (out of scope to considerers) and usage (considerers to use vs. increase frequency of current purchasers)

Recommend to start broad at aged 25+, across all income, and looking for provenance / premium / quality food



SNAPSHOT OF THE SG BULLSEYE TARGET (1/2)



	SG Bullseye
Size of segment	7.8%
Estimated population size	230,549
Share of value	19.4%
Share of volume	19.3%
Proportion of Avocado vs. Grocery Spend	11.8%
Top Grocery Purchase Channel	
Fairprice	54%
Sheng Siong	11%
Giant	9%
Home delivery service apps	8%
Wet markets	8%
Weekly purchase of avocados	1.8
Weekly consumption of avocados across occasions	
Weekday breakfast	2.1
Weekday lunch	1.5
Weekday dinner	1.4
Weekday snack	1.2
Weekend breakfast	1.6
Weekend lunch	1.4
Weekend dinner	1.3
Weekend snack	1.2
Type of purchase	
Planned	66%
Unplanned	33%
Aware of Avocados' Provenance in Stores	57%

	SG Bullseye
Purchase Barriers	86%
Quality	49%
Availability	39%
Price	39%
Education / Awareness	24%
Usage Barriers	74%
Storage / Preparation	44%
Education / Awareness	27%
Versatility	26%
Sensory	18%
Needs (Top 5)	
F : It contains good / healthy fats	63%
F : It is packed with vitamins, minerals and nutrients	45%
F : It contains antioxidants	35%
F : I love the taste / texture	34%
E : I want something healthy to eat	29%
Motivation to Purchase More	
If I want to have a healthier diet	37%
Promotions / specials / discounts in store	32%
Recommendation from my friends / family	29%
If I am aware of the nutritional benefits of avocados	27%
Informative guidelines of how to choose quality avocados shown in store	25%

	SG Bullseye
Key Choice Drivers (Top 10)	
Good value for money based on quality of avocado	46%
Ripeness	37%
Lowest price	33%
Specific health benefits	33%
Colour (i.e. green, purplish, slightly brown)	32%
Size of avocado (i.e. big, small)	32%
Taste profiles (i.e. creamy, buttery)	32%
The feel / texture	30%
Convenience (i.e. available at where I shop at)	27%
Visual appearance	27%
Top 5 Associated Health Benefits	
They contain essential vitamins and minerals	54%
They contain healthy unsaturated fats which help maintain a healthy heart	53%
They contain antioxidants	51%
They are a source of niacin that supports healthy skin	42%
They contain very little carbs / sugar	40%
Most Appealing Territory	
Spirit of Australia	25%
Land of Plenty	34%
Level Up	41%

SNAPSHOT OF THE MY BULLSEYE TARGET



	MY Bullseye
Size of segment	6.9%
Estimated population size	1,224,369
Share of value	14.6%
Share of volume	13.7%
Proportion of Avocado vs. Grocery Spend	1.67%
Top Grocery Purchase Channel	
Tesco	26%
AEON	20%
Other supermarkets	14%
Giant	12%
Jaya Grocer	10%
Weekly purchase of avocados	1.3
Weekly consumption of avocados across occasions	
Weekday breakfast	2.1
Weekday lunch	1.7
Weekday dinner	1.6
Weekday snack	1.6
Weekend breakfast	1.6
Weekend lunch	1.4
Weekend dinner	1.2
Weekend snack	1.4
Type of purchase	
Planned	64%
Unplanned	33%
Aware of Avocados' Provenance in Stores	69%

	MY Bullseye
Purchase Barriers	85%
Quality	46%
Price	45%
Availability	37%
Education / Awareness	23%
Usage Barriers	70%
Storage / Preparation	35%
Education / Awareness	29%
Sensory	22%
Versatility	18%
Needs (Top 5)	
F : It is packed with vitamins, minerals and nutrients	59%
F : It contains antioxidants	47%
F : It contains good / healthy fats	46%
F : It is great for my skin / keeps it youthful	36%
F : I love the taste / texture	35%
Motivation to Purchase More	
Promotions / specials / discounts in store	40%
If I want to have a healthier diet	38%
If I am aware of the different ways to use avocados	33%
If I am aware of the nutritional benefits of avocados	33%
Recipes from specific sites on the internet	32%
Seeing it on TV / cooking shows / food blogs	31%

	MY Bullseye
Key Choice Drivers (Top 10)	
Good value for money based on quality of avocado	60%
Specific health benefits	48%
The feel / texture	38%
Size of avocado (i.e. big, small)	35%
Colour (i.e. green, purplish, slightly brown)	32%
Lowest price	32%
Occasion I am buying for (i.e. snacking, cooking)	29%
Where it is imported from	26%
Convenience (i.e. available at where I shop at)	22%
Taste profiles (i.e. creamy, buttery)	21%
Top 5 Associated Health Benefits	
They contain essential vitamins and minerals	64%
They contain antioxidants	62%
They contain healthy unsaturated fats which help maintain a healthy heart	56%
They are a source of fibre that supports gut health	52%
They are a source of niacin that supports healthy skin	37%
Most Appealing Territory	
Spirit of Australia	16%
Land of Plenty	36%
Level Up	47%

SNAPSHOT OF THE JP BULLSEYE TARGET



	JP Bullseye
Size of segment	20.8%
Estimated population size	8,432,735.68
Share of value	28.2%
Share of volume	27.4%
Proportion of Avocado vs. Grocery Spend	1.23%
Top Grocery Purchase Channel	
Other supermarkets	59%
AEON	19%
Boutique grocery stores	7%
Yokado	4%
Local / traditional market	2%
Weekly purchase of avocados	0.5
Weekly consumption of avocados across occasions	
Weekday breakfast	0.4
Weekday lunch	0.3
Weekday dinner	0.6
Weekday snack	0.2
Weekend breakfast	0.3
Weekend lunch	0.3
Weekend dinner	0.5
Weekend snack	0.2
Type of purchase	
Planned	33%
Unplanned	65%
Aware of Avocados' Provenance in Stores	45%

	JP Bullseye
Purchase Barriers	70%
Quality	46%
Education / Awareness	34%
Price	11%
Availability	6%
Usage Barriers	69%
Education / Awareness	33%
Storage / Preparation	27%
Versatility	22%
Sensory	9%
Needs (Top 5)	
F : I love the taste / texture	62%
F : It is packed with vitamins, minerals and nutrients	46%
F : It contains good / healthy fats	40%
E : I want something healthy to eat	30%
F : It is great for my skin / keeps it youthful	28%
Motivation to Purchase More	
A meal I liked from a restaurant / cafe	29%
If I am aware of the different ways to use avocados	26%
Seeing it on TV / cooking shows / food blogs	25%
If I am aware of the nutritional benefits of avocados	24%
Recipes from a cookbook / catalogue / magazine	20%

	JP Bullseye
Key Choice Drivers (Top 10)	
Ripeness	55%
Size of avocado (i.e. big, small)	41%
Colour (i.e. green, purplish, slightly brown)	37%
Good value for money based on quality of avocado	37%
Taste profiles (i.e. creamy, buttery)	34%
Convenience (i.e. available at where I shop at)	33%
Lowest price	33%
Visual appearance	31%
Occasion I am buying for (i.e. snacking, cooking)	24%
Specific health benefits	22%
Top 5 Associated Health Benefits	
They contain antioxidants	46%
They contain healthy unsaturated fats which help maintain a healthy heart	43%
They contain essential vitamins and minerals	40%
They are a source of B vitamins that help reduce tiredness and fatigue	36%
They are a source of potassium	27%
Most Appealing Territory	
Spirit of Australia	25%
Land of Plenty	42%
Level Up	33%



CATEGORY LANDSCAPE

DRIVERS & BARRIERS

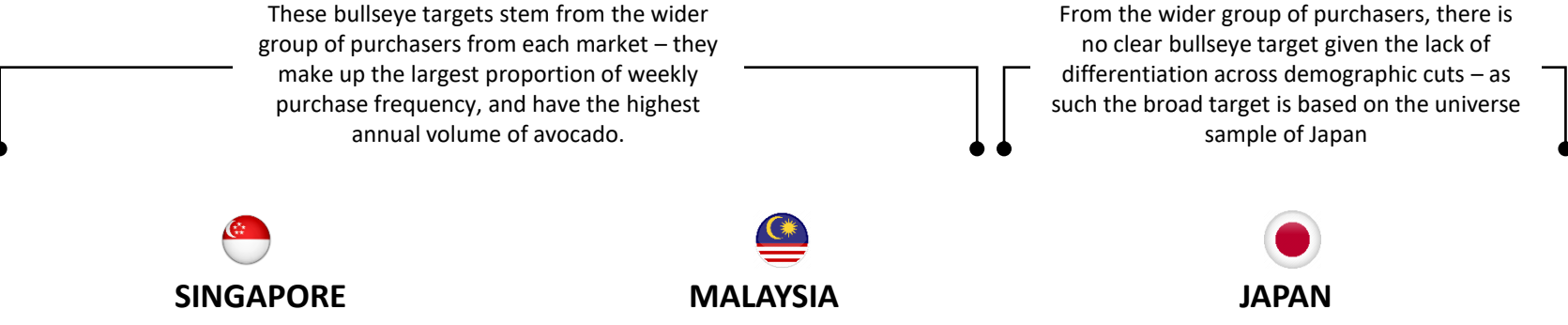
WHO IS OUR BULLSEYE AUDIENCE?

KEY CONSUMER QUESTIONS

TERRITORY EVALUATION

5WS ACTIVATION OPPORTUNITIES

OUR BULLSEYE TARGET AUDIENCE IS:



Unisex, 25- 44, parents with young kids (12 years of age or less, and belong to mid / high household income groups

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Recommend to start broad at aged 25+, across all income, and looking for provenance / premium / quality food



KEY CONSUMER QUESTION FOR SINGAPORE AND MALAYSIA



BUSINESS TASK

Create a brand proposition for avocados that will unlock value via recruitment and increased purchase frequency



TARGET CONSUMER

Both genders, **25- 44, parents with young kids** (12 years of age or less, and belong to mid / **high household income** groups, Loves experimenting / creativity with food, Finds joy through cooking for others / impress others with, and Cares about **provenance / premium ingredients** / using quality or exotic **ingredients to elevate** meals



THE CURRENT CONSUMER BEHAVIOUR LEADING TO THE BUSINESS ISSUE:

While avocado spend and volume is relatively higher, there is still an invisible barrier of consuming avocados **for specific dayparts and occasions**, thereby **limiting frequency** of purchase. There is also a general lack of awareness on storage and selection



THE ATTITUDES OR BELIEFS DRIVING CURRENT BEHAVIOUR:

Avocados currently form a core part of breakfast dayparts and weekdays – and mostly eaten in traditional formats i.e. salad, smoothie, dips), with some slight experimentation across desserts, ice cream.

1 in 2 face issues across versatility (i.e. avocado as an ingredient and across meals) as well as storage (i.e. how long to keep it, how to keep it)

During purchase instore, 1 in 5 is not confident in choosing the perfect avocado, and often fall upon visual cues such as colour and texture which can be subjective to each consumer



KEY CONSUMER QUESTION

Who are we targeting + What attitude do we need to change + what do we need them to do as a result

“How do we motivate middle to high income parents with young kids in Malaysia and Singapore to use Australian avocados more frequently across more occasions and with greater dish versatility – beyond special occasions”

KEY CONSUMER QUESTION FOR JAPAN



BUSINESS TASK

Create a brand proposition for avocados that will unlock value via category awareness and consideration to trial



BROAD CONSUMER TARGET

aged 25+, across all income, and looking for provenance / premium / quality food



THE CURRENT CONSUMER BEHAVIOUR LEADING TO THE BUSINESS ISSUE:

There is not a clear demographic profile to target given that the market is a young market of avocado imports, which is supported by lower avocado spend and volume per pax

Consumers are more **hesitant to purchase** avocados as they are **unsure on how to select / prepare / adapt** avocados for the best sensory experiences. They are high in ethics and are looking **for reassurances in quality** of Australian avocados



THE ATTITUDES OR BELIEFS DRIVING CURRENT BEHAVIOUR:

Avocados are highly associated to “creamy” and “tasty”, and the core reasons for purchasing attribute to loving the taste and texture, and satisfies a taste craving, which shows that avocados have a sensorial indulgence to them

However, they face barriers in understanding how to select the perfect avocados, and are **uncertain** of the ways **avocados to be stored, prepared or used** across meal types and ingredients. This awareness issue is heightened in their key drivers towards purchase, which primarily focuses around visual elements of colour, size and ripeness



KEY CONSUMER QUESTION

Who are we targeting + What attitude do we need to change + what do we need them to do as a result

“How do we lift awareness and drive consideration of Australian Avocados amongst Japanese consumers aged 25+ to reassure them that the quality will provide superior sensory indulgence without risk of disappointment”



CATEGORY LANDSCAPE

DRIVERS & BARRIERS

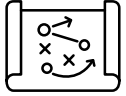
WHO IS OUR BULLSEYE AUDIENCE?

KEY CONSUMER QUESTIONS

TERRITORY EVALUATION

5WS ACTIVATION OPPORTUNITIES

CONCEPT TEST METHODOLOGY



METHODOLOGY

RESPONDENTS WERE SHOWN 2 TERRITORIES

These were randomised in order to avoid any bias

- Respondents were asked to focus on the overall impression of the concept and not to get too hung up on the details (e.g. the images)
- The concept was shown before each question to remind respondents



STIMULUS – WRITTEN CONCEPT

SPIRIT OF AUSTRALIA

They may not have been born in Australia, but we've made avocados our own. They're everywhere. They're part of aussie culture. A life that is inclusive, relaxed and free.

Australian avocados are born in this culture. They come from the best farms on the planet, grown by Aussie farmers that have been nurtured & handled the Australian way.

That's why when you taste an Australian avocado, every mouthful is a premium, every slice is golden.

So, no matter who you are or where you are from, you can taste the spirit of Australia when you choose Australian avocados.



LEVEL UP

Whether is jazzing up a meal or creating something to impress, only the best quality produce and ingredients will do the job.

Australian Avocados are the perfect way to transform meals into something special. Australian Avocados are grown in some of the best farms and conditions in the world, ensuring they look and taste fantastic.

It's the quality & freshness of Australian Avocados that can elevate a meal from ordinary to extraordinary.

So whenever you want to take your food to the next level, you can't beat an Australian Avocado; the definition of quality.



LAND OF PLENTY

In Australia, when you've got landscape likes we do, you want to make the most of them. Wide open spaces, beaches that stretch for miles, and rainforests that are full of life.

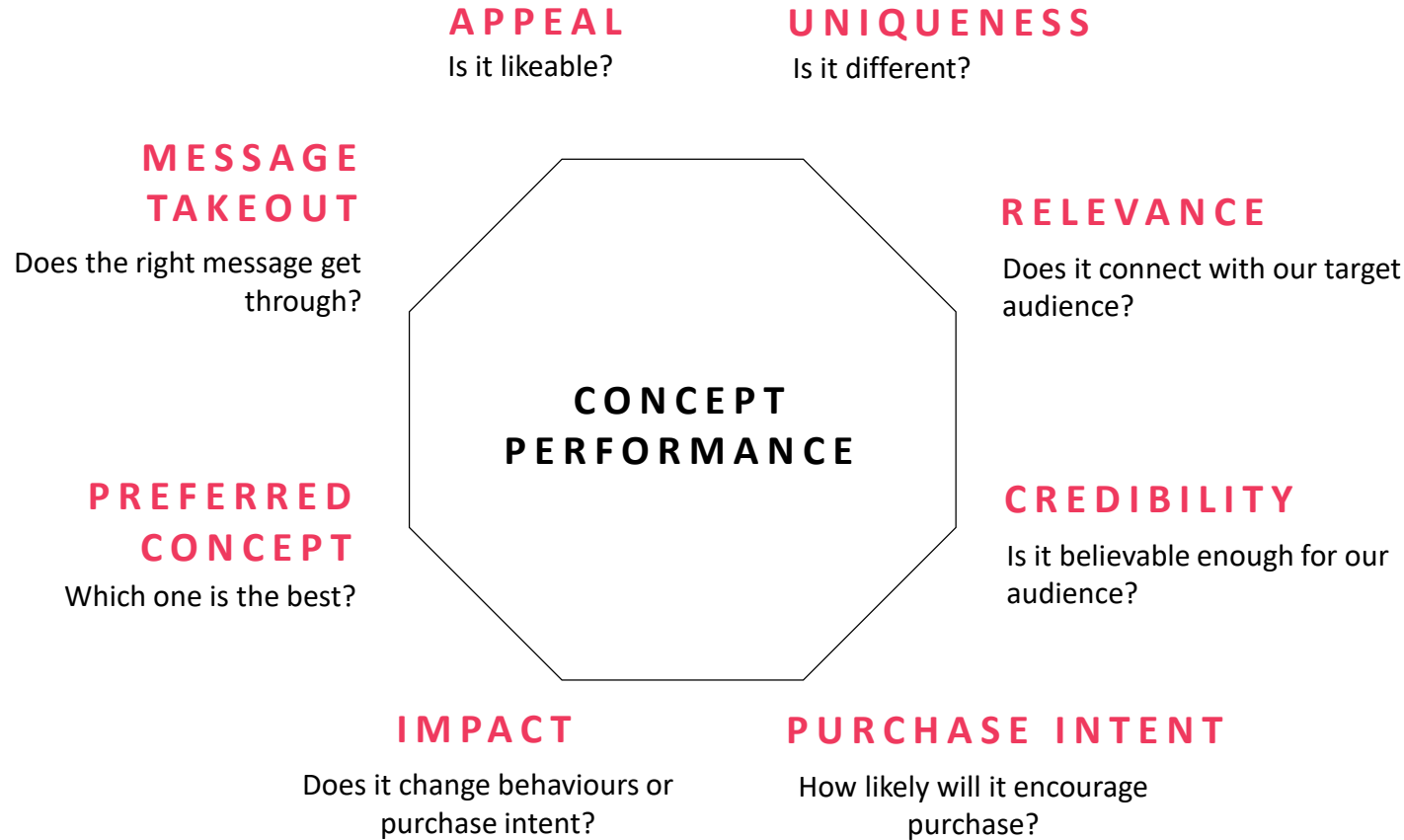
It's in these beautiful lands that the world's best avocados come from. They've perfectly nurtured by the Australian climate & environment and harvested by farmers that have been growing avocados for generations.

The result are the creamiest, and tastiest avocados you've ever had, bursting with all the vitamins and nutrients you need to be at your best.

If you care about what you eat, don't settle for anything less than goodness of Australian avocados.



TO DETERMINE THE BEST CONCEPT TO TAKE FORWARD, WE EVALUATED IT AGAINST 8 CRITERIA...



STRONG PERFORMANCE BY LEVEL UP – BUT LAND OF PLENTY DOES BETTER IN JAPAN

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[SOA]

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[LOP]

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[LU]

T2B% - ALL RESPONDENTS		SINGAPORE			MALAYSIA			JAPAN						
		SOA	LOP	LU			SOA	LOP	LU			SOA	LOP	LU
	APPEAL T2B%	70%	80%	76%			83%	90%	84%			63%	79%	67%
	UNIQUENESS T2B%	68%	72%	64%			80%	84%	81%			59%	61%	55%
	PURCHASE INTENT T2B%%	65%	69%	70%			77%	81%	78%			56%	64%	55%
	CREDIBILITY T2B%%	82%	84%	92%			92%	94%	93%			80%	88%	82%
	FIT T2B%%	57%	65%	63%			70%	78%	75%			38%	49%	42%
	WEEKLY PURCHASE	43%	45%	43%			54%	54%	55%			19%	20%	21%
	AV. TIMES PER WEEK	0.99	1.02	1.02			1.29	1.37	1.43			0.45	0.48	0.48
		690	689	667			636	681	683			692	650	666
	LEVEL UP IS APPEALING AND CREDIBLE					LEVEL UP DRIVES MORE FREQUENCY					LAND OF PLENTY A CLEAR WINNER			

STRONG PERFORMANCE BY LEVEL UP – BUT LAND OF PLENTY DOES BETTER IN JAPAN

SPIRIT OF AUSTRALIA

They may not have been born in Australia, but we've made avocados our own. They're everywhere. They're part of aussie culture. A life that is inclusive, relaxed and free.

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[SOA]

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[LOP]

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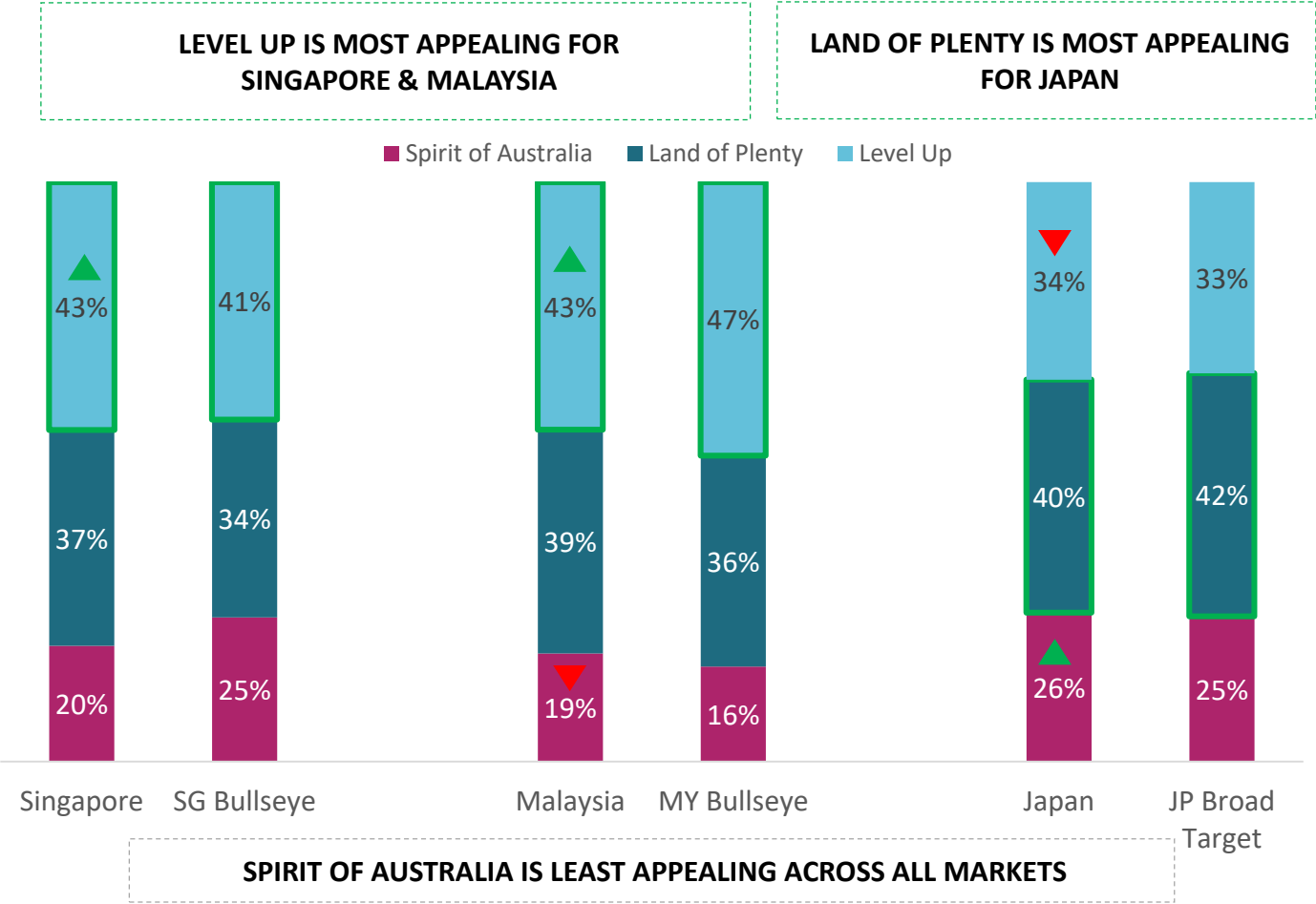
So whenever you want to take your food to the next level, you can't beat an Australian Avocado; the definition of quality.



[LU]

T2B% - BULLSEYE TARGET		SINGAPORE			MALAYSIA			JAPAN						
		SOA	LOP	LU			SOA	LOP	LU			SOA	LOP	LU
	APPEAL T2B%	81%	83%	88%			95%	92%	88%			68%	84%	71%
	UNIQUENESS T2B%	79%	71%	75%			90%	86%	91%			61%	63%	58%
	PURCHASE INTENT T2B%%	75%	71%	80%			88%	83%	86%			60%	71%	62%
	CREDIBILITY T2B%%	91%	87%	95%			100%	94%	98%			81%	90%	83%
	FIT T2B%%	72%	69%	78%			85%	78%	83%			43%	52%	45%
	WEEKLY PURCHASE	68%	42%	63%			66%	52%	62%			24%	25%	26%
	AV. TIMES PER WEEK	1.9 <i>118</i>	1.4 <i>80</i>	2.0 <i>456</i>			2.1 <i>113</i>	1.6 <i>94</i>	2.0 <i>435</i>			0.5 <i>101</i>	0.6 <i>90</i>	0.6 <i>431</i>
		LEVEL UP STRONGER ON ALL METRICS					LAND OF PLENTY HAS LESS FREQUENCY					LAND OF PLENTY A CLEAR WINNER		

FORCED APPEAL - THE TERRITORY PREFERENCES ARE MUCH CLEARER WHEN FORCED



LEVEL UP

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SPIRIT OF AUSTRALIA

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Australian avocados are born in this culture. They come from the best farms on the planet, grown by Aussie farmers that have been nurtured & handled the Australian way.

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So, no matter who you are or where you are from, you can taste the spirit of Australia when you choose Australian avocados.



PERCEIVED IMPACT – WHILE ALL TERRITORIES HAVE A STRONG POSITIVE IMPACT, LAND OF PLENTY IS SIGNIFICANTLY STRONGER THAN THE OTHERS IN JAPAN

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PERCEIVED IMPACT (T2B%) <i>Strongly agree + somewhat agree</i>	SINGAPORE			MALAYSIA			JAPAN		
	SOA	LOP	LU	SOA	LOP	LU	SOA	LOP	LU
To what extent do you agree with each of the following statements relating to this idea?									
Australian avocados are unique because they make me think of Australia in their identity of being associated to culinary experiences in Aust	70%	70%	69%	82%	85%	82%	57%	59%	55%
Australian avocados are grown in an abundant, clean environment that naturally creates a superior avocado	75%	78%	78%	87%	90%	86%	70%	77%	68%
Australian avocados give me a sense of indulgence that no other fruit / vegetable can	62%	65%	63%	76%	78%	73%	56%	62%	59%
Australia's environment produces high quality avocados that are better for me	73%	75%	73%	86%	86%	87%	66%	72%	66%
Australia's perfect climate for growing avocados gives me reassurance on its consistency and richness in its taste / flavour	77%	80%	78%	85%	90%	87%	72%	75%	71%
Australian avocados are safe for consumption with strict hygiene enforcement and protocols	79%	80%	79%	86%	88%	86%	68%	72%	70%
	CONSISTENT POSITIVE IMPACT BY ALL TERRITORIES			STRONGER AGREEMENT OVERALL IN MALAYSIA			LAND OF PLENTY SIGNIFICANTLY IMPACTS SUPERIOR QUALITY AND INDULGENCE		

LEVEL UP: CLEARLY CONNECTING AUSTRALIAN PROVENANCE WITH AN ELEVATED EXPERIENCE CREATES A POWERFUL REASON TO BUY AUSTRALIAN AVOCADOS

Anchored in notion of quality, a known and credible aspect of Aussie produce

'I trust produce from Australia. I trust that they have the highest standards for growing produce in the best farms and conditions, resulting in the best quality fruits and vegetables, while at the same time being eco friendly and sustainable.- SINGAPORE

'It is nurtured in the world's highest level farm and environment.- JAPAN

Emphasises the transformative power of Australian avocados, creating differentiation

'Australian has produced one of the world creamy and bigger avocados. The mentioning of high quality Australian avocados makes the advert much appealing!- SINGAPORE

'We deserve the best and the best comes from Australia.- MALAYSIA

'It's fascinating to say that Australian avocados are grown on world-class farms and environments. I definitely wanted to buy an Australian avocado of excellent quality.- JAPAN

As a platform, 'Level Up' has the opportunity to educate & inspire consumers

'I have eaten a variety of dishes in Australia that use avocados in interesting ways.- MALAYSIA

'I often think of avocados in salads, in sandwiches, in dips, never thought of it as a cooked dish. Somehow these texts inspire me of making a cooked dish with avocados.- MALAYSIA

'I was fascinated by the freshness and quality that could turn my everyday meal into something special.- JAPAN

LEVEL UP

Whether is jazzing up a meal or creating something to impress, only the best quality produce and ingredients will do the job.

Australian Avocados are the perfect way to transform meals into something special. Australian Avocados are grown in some of the best farms and conditions in the world, ensuring they look and taste fantastic.

It's the quality & freshness of Australian Avocados that can elevate a meal from ordinary to extraordinary.

So whenever you want to take your food to the next level, you can't beat an Australian Avocado; the definition of quality.



LEVEL UP EFFECTIVELY HARNESSES AN IMPORTANT FUNCTIONAL BENEFIT (QUALITY) IN CONNECTION WITH A CLEAR AND CREDIBLE PROVENANCE STORY. AT THE SAME TIME THIS IDEA BEGINS TO CREATE MORE EMOTIONAL CONNECTIONS- INSPIRING CONSUMERS, WHILST CREATING REASSURANCE

SPIRIT OF AUSTRALIA: WHILST EVOCATIVE, CONSUMERS STRUGGLE TO CONNECT AUSSIE CULTURE ALONE WITH MOTIVATION TO PURCHASE AUSTRALIAN AVOCADOS

Whilst appealing & evocative, the notion of Aussie culture isn't credible enough on it's own

Consumers are looking for more concrete claims that relate to functional benefits of avocados

This positioning fails to distinguish the uniqueness of the product vs other COOs

'I'm not sure about the connection between Australian culture and the best farms- JAPAN

'Don't really tell us the strong points why avocados grown in Australia are of safer and cleaner fruit.- SINGAPORE

There is no specific strong point that stated the difference in Australia avocados with other countries avocados.- SINGAPORE

'Find it abit of overselling. Can't really link the idea of Avacado to Australia culture.- SINGAPORE

'Rather know about the nutritional benefits and the taste- SINGAPORE.

'Why avocado only the best in Australia. Other environment also can improve to enhance the avocado quality- MALAYSIA

'Avocado needs a suitable climate And soil. It has nothing to do with culture- MALAYSIA

EMOTIONAL CONNECTION ALONE WILL NOT BE ENOUGH FOR US TO CREATE A GENUINLEY UNIQUE AND COMPELLING POSITIONING FOR AUSTRALIAN AVOCADOS

SPIRIT OF AUSTRALIA

They may not have been born in Australia, but we've made avocados our own. They're everywhere. They're part of aussie culture. A life that is inclusive, relaxed and free.

Australian avocados are born in this culture. They come from the best farms on the planet, grown by Aussie farmers that have been nurtured & handled the Australian way.

That's why when you taste an Australian avocado, every mouthful is a premium, every slice is golden.

So, no matter who you are or where you are from, you can taste the spirit of Australia when you choose Australian avocados.



LAND OF PLENTY: IN JAPAN, THE NOTION OF OPTIMUM ENVIRONMENT, COMBINED WITH CARE AND EXPERTISE CREATES A SENSE OF TRUST AND REASSURANCE OF QUALITY

Dedication, care & effort are foundational pillars of Japanese society- and clearly expressed here

Farmers who have been making avocados for generations give us a sense of security and good quality.

'A very sincere image of the farmers who have been making avocados for generations in abundant nature.

'I got the image that avocados are produced in a vast land. I felt the tradition and important things that have been passed down from the expression of generations.

A culture intrinsically connected to nature, leveraging Australia's optimum environment is powerful

'An environment grown on large lands, kilometers of coasts and vibrant rainforests

'Australia is blessed with nature, and I think the avocados made there are also delicious.

'It fully conveys the introduction of Australia's fascinating lands. I had an intuition that avocados made in that area would be delicious and nutritionally wonderful.

Creating a strong sense of quality and trust in the Australian avocado product

'It makes me realize that the natural environment is excellent and the highest quality avocado can be produced.

'You can trust that Australia's climate has come to make avocados and has been pursuing deliciousness for generations.

LAND OF PLENTY

In Australia, when you've got landscape likes we do, you want to make the most of them. Wide open spaces, beaches that stretch for miles, and rainforests that are full of life.

It's in these beautiful lands that the world's best avocados come from. They've perfectly nurtured by the Australian climate & environment and harvested by farmers that have been growing avocados for generations.

The result are the creamiest, and tastiest avocados you've ever had, bursting with all the vitamins and nutrients you need to be at your best.

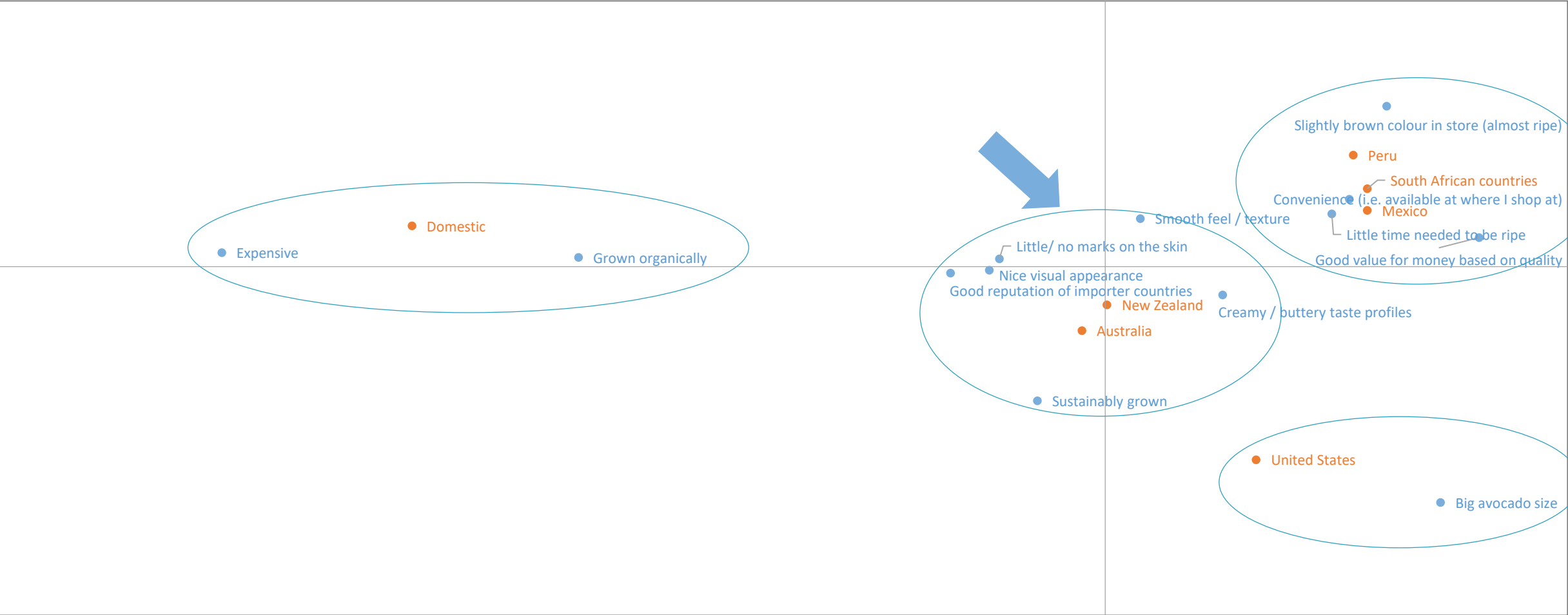
If you care about what you eat, don't settle for anything less than goodness of Australian avocados.



JAPAN IS A UNIQUE MARKET, WITH HIGH EXPECTATIONS PLACED ON QUALITY THAT CAN BE CREDIBLY MET VIA A POSITIONING BUILT AROUND THE UNIQUENESS OF THE AUSTRALIAN ENVIRONMENT AND AGRICULTURAL PRACTICES

AUSTRALIAN AVOCADOS HAVE STRONG SENSORIAL PROFILES AND QUALITY REASSURANCES (REPUTATION, GROWING METHODS, VISUAL). LEVERAGE THESE AGAINST MEXICAN AVOCADOS

Which of the statements below would you associate with the avocados from countries shown? (JP Broad Target)



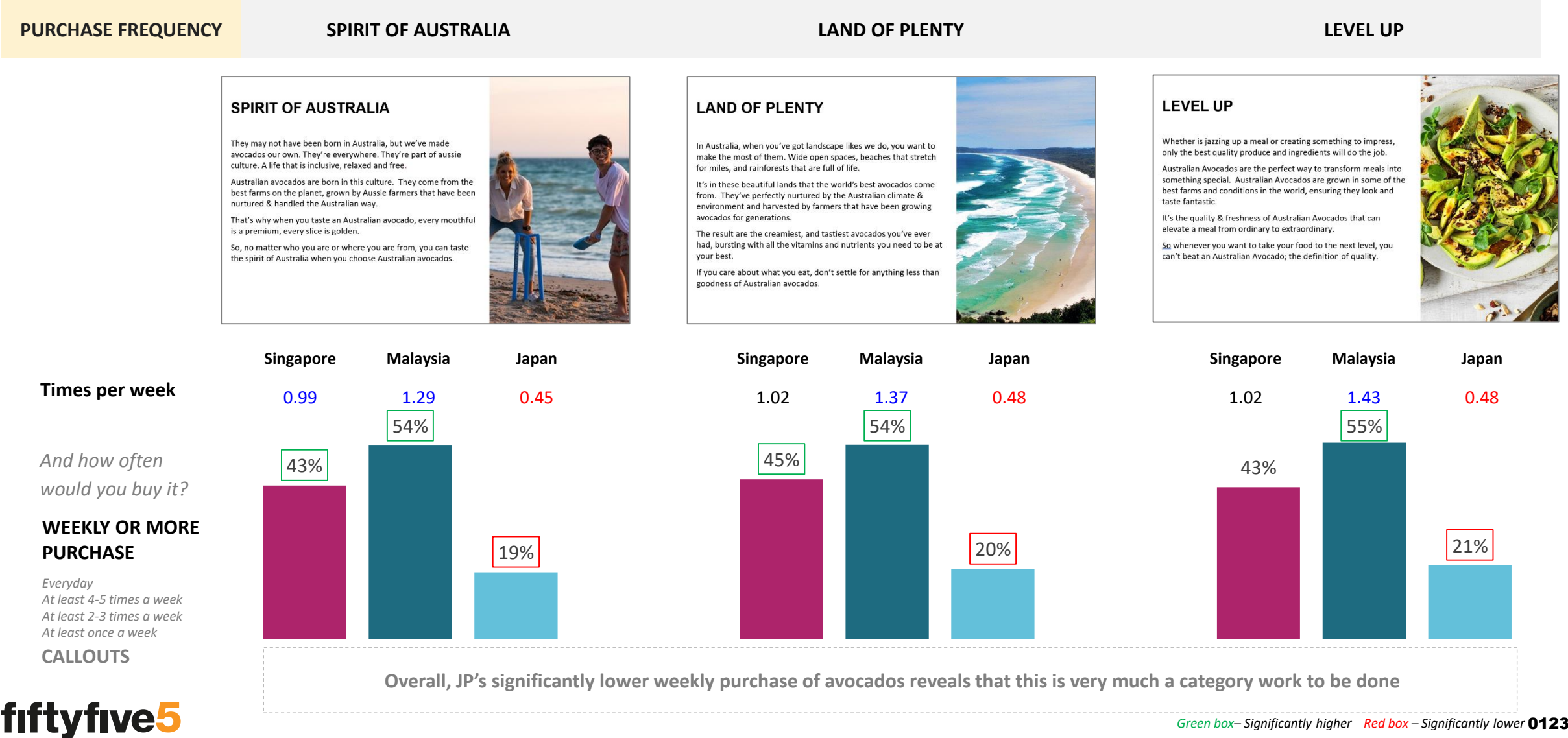
JP BROAD TARGET : FROM A RANKING PERSPECTIVE, THE TOP ASSOCIATION FOR AUSTRALIAN AVOCADOS IS CREAMY / BUTTERY TASTE PROFILES, FOLLOWED BY VISUAL APPEARANCE AND REPUTATION

Which of the statements below would you associate with the avocados from countries shown? (JP Broad Target) 

Ranked within individual country columns

	Australia	New Zealand	Mexico	Peru	United States	South African countries	Domestic
Little time needed to be ripe	11	10	9	7	8	6	11
Big avocado size	6	9	7	9	1	5	13
Slightly brown colour in store (almost ripe)	12	11	6	4	10	1	10
Expensive	10	13	13	13	11	13	1
Good value for money based on quality	4	4	2	1	3	2	12
Convenience (i.e. available at where I shop at)	7	7	1	3	4	3	9
Creamy / buttery taste profiles	1	1	3	2	2	4	5
Nice visual appearance	2	2	5	6	5	7	3
Smooth feel / texture	5	5	4	5	7	8	6
Grown organically	9	8	12	12	13	11	2
Little/ no marks on the skin	13	12	10	11	12	12	8
Good reputation of importer countries	3	3	8	8	9	9	4
Sustainably grown	8	6	11	10	6	10	7
	445	146	164	119	147	122	236

PURCHASE FREQUENCY: LEVEL UP INFLUENCES HIGHER WEEKLY PURCHASERS FOR MY, WHILE SG IS ON THE FENCE ABOUT LAND OF PLENTY AND LEVEL UP



USE LEVEL UP AND LAND OF PLENTY TO COMMUNICATE AUSTRALIAN AVOCADOS IN THESE MARKETS



Create a brand proposition for avocados that will unlock value via recruitment and increased purchase frequency



Create a brand proposition for avocados that will unlock value via category awareness and consideration to trial



LEVEL UP

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Australian Avocados are the perfect way to transform meals into something special. Australian Avocados are grown in some of the best farms and conditions in the world, ensuring they look and taste fantastic.

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If you care about what you eat, don't settle for anything less than goodness of Australian avocados.



Use Level up territory to communicate Australian avocado quality and freshness to **elevate meals, while adapting** and using avocados across **more daypart menus / versatility** not just for special occasions but also in everyday general consumption

Use Land of plenty to communicate **undisputed quality** of Australian avocados that promises great texture and **flavour indulgence** and promote **accessibility** of home consumption

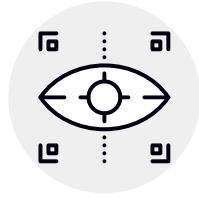
CONSUMER VALUE PROPOSITION FRAMEWORK FOR SEA



CONSUMER NEED

I love experimenting
with new tastes,
flavours

I love food so I'm
always looking for
new ways to make
my meals and snacks
extra tasty



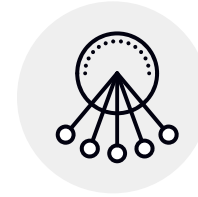
CONSUMER TENSION

It's hard to make my
meals even more
delicious but still
keep them healthy



KEY POSITION

Australian avocados
are the perfect way
to level up your
meals; the goodness,
flavour and texture of
Australia's best
transforms your
meals from good to
great



COMPELLING BENEFITS

Adds a superior taste
to any meal

Adds a splash of
colour and vibrancy

Fresh and natural,
ensures you're
fueling your body

Creamy texture so
you can use it for
anything



PROOF POINTS

Grown in some of the
best farming
conditions in the
world

Freshly picked by
families who have
been growing
avocados for
generations

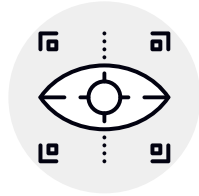
CONSUMER VALUE PROPOSITION FRAMEWORK FOR JP



CONSUMER NEED

I'm always look for
fresh, natural fruits
and vegetables to
help keep me healthy

Avocados are full of
goodness and a great
snack but...



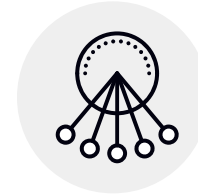
CONSUMER TENSION

I don't really think
about them much and I
don't know how to use
them



KEY POSITION

Australian avocados
are the best in the
world; grown in the
best conditions
they're perfect for
just about anything



COMPELLING BENEFITS

Great taste even with
Japanese cuisines and
ingredients

Adds a splash of
colour and vibrancy

Easy to use for a
variety of different
meals and snacks



PROOF POINTS

Superior taste

Superior appearance

Creamy, delicious
texture

Full of health benefits



CATEGORY LANDSCAPE

DRIVERS & BARRIERS

WHO IS OUR BULLSEYE AUDIENCE?

KEY CONSUMER QUESTIONS

TERRITORY EVALUATION

5WS ACTIVATION OPPORTUNITIES

EATING ALONE IS HIGHEST, WITH GREATEST INCIDENCE OBSERVED IN JP. HIGHER CONSUMPTION SEEN IN YOUNGER FAMILIES FOR SEA MARKETS

Children from JP families of Considerers are less likely to consume avocados

Who consumes avocado? / Who would consume avocado?

	Singapore			Malaysia			Japan		
	Total	Purchasers	Considerers	Total	Purchasers	Considerers	Total	Purchasers	Considerers
Myself	83%	85%	77%	79%	79%	81%	92%	93%	89%
My partner	37%	39%	30%	26%	27%	25%	35%	35%	30%
My kids	24%	26%	17%	21%	21%	20%	21%	23%	15%
My parents	18%	17%	22%	24%	25%	21%	7%	8%	4%
n	1023	827	196	1000	807	193	1004	848	156

POTENTIAL CONSIDERATIONS / OPPORTUNITY SPACES



SG & MY – Opportunity to explore avocado consumption across younger children below 12 years of age, and increase incidence across self consumption



JP – Opportunity to dial up avocado consumption by oneself – this could mean individual meals / small meals

Singapore

Row %

Myself

My partner

My parents

My kids

Other adults

Young SINKS/DINKS	Mid SINKS/DINKS	Older SINKS/DINKS	Young Family	Older Family	Empty Nester
13%	18%	11%	25%	20%	13%
2%	13%	12%	38%	26%	9%
42%	24%	8%	7%	4%	15%
			59%	41%	
20%	34%	9%	8%	2%	26%
126	202	109	263	198	125

Malaysia

Row %

Myself

My partner

My parents

My kids

Other adults

Young SINKS/DINKS	Mid SINKS/DINKS	Older SINKS/DINKS	Young Family	Older Family	Empty Nester
23%	15%	3%	24%	14%	20%
2%	9%	3%	50%	20%	17%
42%	20%	2%	12%	1%	23%
			66%	34%	
25%	24%	13%	21%	3%	15%
240	163	28	243	124	202

Japan

Row %

Myself

My partner

My parents

My kids

Other adults

Young SINKS/DINKS	Mid SINKS/DINKS	Older SINKS/DINKS	Young Family	Older Family	Empty Nester
13%	21%	9%	22%	21%	14%
7%	21%	8%	28%	18%	18%
22%	38%	16%	6%	13%	5%
			40%	60%	
23%	55%	15%	0%	0%	7%
108	209	99	211	224	153

BREAKFAST IS THE BIGGEST CONSUMPTION OCCASION IN SG & MY, BUT DINNER IS THE KEY CONSUMPTION OCCASION IN JAPAN

How often do you consume avocados for the following meals?

Purchasers:			
Share Across Daypart / Occasion	Singapore	Malaysia	Japan
Weekday NET	55%	55%	56%
Weekend NET	45%	45%	44%
Breakfast NET	31%	30%	26%
Lunch NET	25%	24%	19%
Dinner NET	23%	22%	40%
Snack NET	20%	23%	14%
SUM	100%	100%	100%
<i>n</i>	827	807	848

Average times per week	Singapore	Malaysia	Japan
Weekday NET	3.85	5.67	1.39
Weekend NET	3.20	4.67	1.11
Breakfast NET	2.20	3.12	0.66
Lunch NET	1.78	2.51	0.47
Dinner NET	1.62	2.30	1.01
Snack NET	1.44	2.41	0.35
SUM	7.04	10.34	2.50
<i>n</i>	827	807	848

Which of the following meal occasions would you consider eating avocados?

Considerers:			
Incidence Across Daypart / Occasion	Singapore	Malaysia	Japan
Weekday NET	68%	77%	61%
Weekend NET	72%	53%	74%
Breakfast NET	38%	38%	13%
Lunch NET	28%	25%	15%
Dinner NET	33%	22%	84%
Snack NET	48%	48%	6%
NET	100%	100%	100%
<i>n</i>	196	193	156

POTENTIAL CONSIDERATIONS / OPPORTUNITY SPACES



For existing purchasers, consider reinforcing weekdays and breakfast to increase avocado consumption incidence [frequency per week]



For growth / conversion of considerers, look into weekends and dayparts such as breakfast and especially snacking occasions



Similar to SG, consider reinforcing weekdays and breakfast to increase avocado consumption incidence [frequency per week]



For growth / conversion of considerers, look into snacking occasions in addition to breakfast and look into how avocados can be involved in meal occasions across weekdays



Given that Japan is about growing the category, look into dinner activation opportunities for avocados, as well as weekends

AVOCADOS ARE MOSTLY CONSUMED AT HOME IN ALL MARKETS BUT THERE ARE KEY OOH DIFFERENCES BY MARKET

SG – Casual restaurants, mostly to-go occasions that feeds into convenience
 MY – Higher tendency for consumption within social settings, presumably not a rushed occasion
 JP – Inclination to consume at restaurants and cafes that potentially feeds into the reassurance of quality prepared avocados

Column %	Singapore	Malaysia	Japan		Purchasers	Considerers
At home - For myself / share with others in my household	76%	72%	77%	→	79%	69%
Salad / sandwich stores	36%	32%	30%		30%	33%
At restaurants / cafes	27%	27%	39%		37%	47%
Meals with family outside of my household	17%	24%	6%		6%	7%
Standalone juice stores	21%	22%	1%		1%	1%
Fast food restaurants	9%	9%	16%		15%	18%
Dinner parties	9%	10%	6%		6%	8%
Picnic	8%	10%	2%		2%	2%
n	1023	1000	1004		848	156

No significant differences between purchasers & considerers

- POTENTIAL CONSIDERATIONS / OPPORTUNITY SPACES
-  Convenience occasions make up most of where avocados are consumed given hectic lifestyle – how can we expand avocado towards slower-spaced meal occasions?
 -  Given higher incidence of consumption across social settings (i.e. picnic, parties, meals with family), how do we frame avocados as a suitable sharing snacking* or bigger meal occasion?
 -  With avocados consumed mostly by oneself and with home consumption the highest, how do we increase accessibility for in-home consumption across meal occasions, especially for dinner dayparts / weekends*?



HIGHER LEVEL OF SOPHISTICATION & OCCASIONS OBSERVED FOR SEA MARKETS COMPARED TO JP

How do you usually eat avocados? / If you were to eat an avocado tomorrow, how would you eat it?

Column %	Singapore			Malaysia			Japan		
	Purchasers	Considerers		Purchasers	Considerers		Purchasers	Considerers	
In a salad	38%	40%	30%	49%	50%	44%	70%	71%	65%
To use as a filling, e.g. in a sandwich/ wrap	33%	33%	29%	29%	29%	29%	17%	18%	15%
As a side dish accompaniment for a meal	17%	17%	16%	16%	16%	16%	41%	44%	29%
As a snack on its own	30%	29%	34%	28%	29%	25%	14%	14%	13%
In a breakfast meal	28%	29%	20%	32%	33%	26%	7%	8%	5%
To put in a smoothie/frappe/ shake	31%	31%	29%	33%	32%	34%	2%	2%	2%
As a topping	17%	18%	13%	12%	13%	8%	19%	19%	14%
An ingredient in a dessert	16%	17%	14%	29%	29%	33%	1%	1%	1%
As a snack with something else	15%	15%	12%	18%	19%	15%	10%	10%	7%
As a dip	16%	17%	10%	11%	13%	3%	15%	15%	12%
As a main ingredient in a meal	11%	11%	7%	10%	10%	6%	11%	11%	10%
For a specific cuisine, such as Mexican, Japanese sushi	10%	11%	9%	11%	12%	5%	9%	9%	9%
To make ice-cream	7%	8%	3%	13%	14%	9%	0%	0%	0%
As an ingredient in baking	5%	6%	3%	9%	9%	5%	3%	4%	1%
As a packed meal for myself / my family	8%	9%	4%	7%	8%	4%	1%	1%	1%
n	1023	827	196	1000	807	193	1004	848	156

Observations

WHILE AVOCADO CONSUMPTION IS SOPHISTICATED, COMPARED TO MY, CONSUMPTION PAIRING SEEMS TO BE MORE “CAREFUL” / GIVEN MORE “THOUGHT” – I.E. USING IT AS A DIP, RATHER THAN RECKLESS INNOVATION

COMPARED TO SG, MY IS SLIGHTLY MORE ADVENTUROUS WITH CONSUMPTION PAIRING (I.E. DESSERT INGREDIENT, AS A SNACK WITH ANOTHER ITEM) AND GOES FURTHER WITH EXPERIMENTATION I.E. ICE CREAM / BAKING

DUE TO THE LACK OF EDUCATION / AWARENESS ON HOW / WHAT MEALS TO PREPARE AVOCADO WITH, CONSUMPTION PAIRING IS RELATIVELY SAFE (I.E. SALADS), AND EASIER TO PREPARE (I.E. SIDE DISH, TOPPING) WITH NOT MUCH COMPLEXITY

POTENTIAL TO EDUCATE / INCREASE AWARENESS ON AVOCADO VERSATILITY ACROSS INGREDIENTS AND PREPARATION METHODS

HOW CAN WE GET AVOCADO CONSUMPTION TO BE MORE WIDELY USED, ESPECIALLY ACROSS ASIAN CUISINES WHERE THERE ARE COMPLEXITIES OF FLAVOURS AND KNOWN TO BE VERSATILE? IS THE KEY TO UNLOCKING GROWTH IN FURTHER EDUCATION OF AVOCADO VERSATILITY WITH FLAVOUR PROFILES OR ACROSS MEAL TYPES (I.E. APPETISER, DESSERT, SNACKING, MAIN MEAL)

WHAT ARE THE KEY ACTIVATION OPPORTUNITIES FOR SEA?



Singapore



Malaysia

	WHO WITH	Self consumption is the highest. higher consumption of avocados in younger kids (= <12yr) than older (<12yr)	
		Opportunity to explore avocado consumption across younger, and dial up self consumption	
	WHEN (REINFORCE FREQUENCY)	Weekdays and breakfast (followed by lunch) have highest share of avocado consumption	
		Reinforce frequencies across weekdays & breakfasts / lunch	
	WHEN (GROWTH)	Highest incidence : Weekdays & weekends, snacking, breakfast	Highest incidence : Weekdays, breakfast and snacking
		For growth / conversion of considerers, look into weekdays and especially weekends, as well as dayparts such as breakfast and especially snacking occasions	For growth / conversion of considerers, look into snacking occasions in addition to breakfast and look into how avocados can be involved in meal occasions across weekdays
	WHERE	Avocados are mostly consumed at home	
		Higher tendencies to eat from casual eateries and also on-the-go (stand-alone juice stores, salad, sandwich stores)	Higher tendencies to eat across social settings (meals with family outside, dinner parties, picnics)
		How to expand avocado from convenience-based occasions towards slower-paced meal occasions?	How to frame avocados as a suitable sharing snacking* or bigger meal occasion?
	WHAT WITH	Wider usage and ways of eating avocados, albeit more “conservative” and less “experimental” compared to MY	Wider usage and ways of eating avocados, more adventurous and experimental
		How to dial up frequency of consumption, given existing cuisines known for complex / versatile flavours? Consider further education of avocado versatility with flavour profiles or across meal types	

WHAT ARE THE KEY ACTIVATION OPPORTUNITIES IN JAPAN?



Japan

	WHO WITH	Self consumption is the highest (overindexed)
	WHEN (REINFORCE FREQUENCY)	<i>Weekdays and dinners have the highest share of avocado consumption. Underindexed frequencies compared to SEA</i> To grow category, look into dinner activation opportunities for avocados across the week
	WHEN (GROWTH)	<i>Highest incidence : Weekend and dinner</i> Given that Japan is about growing the category, look into dinner activation opportunities for avocados, as well as weekends
	WHERE	Avocados are mostly consumed at home <i>Higher tendencies to eat in more relaxed settings i.e. restaurants / cafes and quick service restaurants</i> How to increase accessibility for in-home consumption across meal occasions, especially dinner dayparts?
	WHAT WITH	<i>Due to the lack of education / awareness on avocado preparation, consumption pairing is relatively safe (and easier to prepare (with not much complexity</i> Potential to educate / increase awareness on avocado versatility across ingredients and preparation methods

SECTION 6

FINAL RECOMMENDATIONS



THE LAST 5 MINUTES

THE OPPORTUNITY AND BULLSEYE TARGET

Given relatively higher avocado penetration in SG & MY, the opportunity is to drive frequency and consumption among the bullseye target of 25-44, Medium to high income, young families who experiments with foods, finds joy through cooking, and cares about quality ingredients

There are lower levels of awareness and consideration in Japan
Need to create salience amongst a broader target of 25+, across all incomes, and looking for provenance / premium / quality food

DRIVERS AND BARRIERS

There are some key motivational differences between SEA and Japan to consider

Avocados in Japan are driven more by sensorial indulgence i.e. taste, satisfying a craving, whereas SEA markets are more focused on health benefits (healthy fats, nutrients)

Japanese barriers are not knowing how to select, how to use, fear of getting it wrong and they are put off by poor appearance and level of ripeness

LEVEL OF SOPHISTICATION

There is greater confidence of usage in SG/MY which suggests consumers are more sophisticated- they are more experimental and exploratory by using across more types of dishes

Japan takes a more risk adverse approach, where avocados mainly using as a salad / side dish – which are safer and in line with their caution and fear of failure

Opportunity in Japan to educate & increase awareness on the basics; avocado selection, preparation method and versatility across ingredients

GROW VIA OCCASION USAGE

Reinforce weekdays and breakfast occasions to increase avocado consumption frequency amongst purchasers in Singapore and Malaysia

Opportunity to drive Versatility with flavour profiles, or across meal types and occasions

Given that Japan is about growing the category, look into dinner activation opportunities for avocados, as well as weekends

TWO TERRITORIES TO PROGRESS

The territories are all positively received but “Level Up” resonates more consistently – especially for MY And SG. Use “Level up” to encourage them to transform and enhance and improve their meals with quality ingredients

Level Up is also popular in Japan – but “Land of Plenty” receives higher engagement and relevancy – Use this direction to leverage their love affair with Australia and the fact that these Avocados look good & taste good. Reassure them that the quality of produce from this climate and environment means they can’t get it wrong with Australian Avocados



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SECTION 6

APPENDIX: QUALITATIVE MARKET SNAPSHOT



CULTURE



CONSUMER



CATEGORY



AUSTRALIA

MARKET SNAPSHOT:

JAPAN





JAPANESE CULTURAL CONTEXT

A LOVE AFFAIR WITH SEASONALITY



The Japanese revel in living by the rhythm of the four seasons and the natural progressions throughout the year. Elegant representations of nature penetrate a wide range of Japanese genres and media—from tea ceremonies and flower arrangements, to branded product releases, social activities and annual observances.

ONUS ON EFFORT



Effort is a primary determinant of achievement in Japan. Pride in making effort in one's everyday activities and rituals is part of the Japanese cultural fabric—and something they want to be seen doing. A methodical and process driven approach to things helps to ensure the correct effort has been applied.

GETTING IT “RIGHT”



Japanese consumers are acutely aware of making sure they do things the ‘correct’ way. They crave detailed information, and can be slow to adopt new things for fear of getting it wrong. The wine market is a perfect example of this, only with more recent focus on consumer education & confidence has the category started to grow in Japan

AESTHETIC APPEAL



The concept of aesthetics in Japan is seen as an integral part of daily life, and underpins much of Japanese cultural and aesthetic norms on what is considered tasteful or beautiful. This especially applies to food & diet, many Japanese consumers pursue ‘health’ in an effort to appear thin & beautiful

QUALITY STANDARDS



Exceptionally high standards are the result of striving for excellence and perfection in every aspect of life. This is often expressed through customer services (e.g. hotels, restaurants) but also personal presentation, wrapping and food presentation

JAPANESE CONSUMER ATTITUDES TOWARDS FOOD

FOOD IS A NATIONAL PASTIME IN JAPAN

It's a Gourmet Paradise, with the most restaurants (and most Michelin stars) of any city in the world. Meals are inextricably linked to social practices, and represent a way to socialise, build stronger bonds, cooperate, and help society develop as a whole.

JAPANESE FOOD CULTURE IS INHERENTLY ABOUT BALANCE AND SEASONALITY

Consumers seek out functional foods with known nutritional benefits to help them maintain a healthy & balanced diets.

Fruit & vegetables are a key part of this (especially green & yellow vegetables 緑黄色野菜 (ryokuoshoku yasai), as are fermented foods (for digestive health), protein (muscle maintenance/ weight loss) and increasingly pro & prebiotics are seen as an important part of a wholistic diet.

WESTERN FOOD IS NOT A REGULAR PART OF MOST JAPANESE PEOPLE'S DIET

Most are cooking Japanese/ Asian cuisine at home, and these cuisines also dominate when eating out. A lot of their exposure to 'Western Foods' (which includes avocados) comes from eating out at Western eateries, travel to Western countries and social media trends.

VERSATILITY AND EASE OF COOKING/ PREPARING INGREDIENTS IS KEY

Japanese consumers can work very long hours, so when they come home they need food that's easy & convenient.

AVOIDING FOOD WASTAGE IS ALSO IMPORTANT

There's reluctance to buy foods which they aren't confident in using as it may result in the food being wasted, this also applies to foods which may be 'too big' to eat in one go, especially for Singles.



CATEGORY- AVOCADOS



Known by many as “Forest Milk/ Butter”, a low carb diet boom in the 2000’s has made avocados a well known food, with many consumers first being introduced to them via TV and articles around it’s **healthy, ‘good fat’ and general high nutritional content AND beauty benefits**. It’s a delicious, tasty, creamy & rich product with a truly unique mouthfeel that **high freq** users love- they are true Avocado Ambassadors.

However, despite this it’s **seen as a troublesome food**, that’s unpredictable and hard to get right in terms of purchase. This is a big barrier in a nation that is focused on being seen to be doing the right thing. There’s also some hesitance around calorie content, in a market that’s very focused on external aesthetics they’re used to avoiding/ minimising products with high calories. Avocado is seen as *‘the only vegetables you can have too much of’*.

PERCEPTIONS

- **Seen as a vegetable**- and this is reinforced by their position in store
- Known for it’s **strong functional benefits**- including nutrition & beauty (e.g. Vitamin E) BUT some concern for high calories
- Very much a **Western food**, associated with eating out (at Western cafes/ restaurants) and therefore **more ‘special’** than other fresh foods
- **Versatile** (esp **high freq** users)- ability to eat as a main meal or snack
- **Mexican provenance** most commonly assumed, due to guacamole and hot climate which is presumed to be needed

PURCHASE EXPERIENCE

- **High freq** users incorporate avocados into their weekly shopping routines, whereas **low freq** users are usually triggered by a promotion or inspired by a recipe they’ve seen
- A difficult product to choose, anxiety is felt around getting the ripeness right- **high freq** users have their own strategies for choosing
- Large amount of **signage & POS** in store to help guide choice (e.g. colour charts for ripeness) & reassure on product qualities
- **Cost not a spontaneous barrier**, although promotions do drive usage for **low freq** users

CONSUMPTION

- For **High freq** users a wide variety of usage occasions- most often in a salad, or side dish, but also in smoothies, on it’s own, with sashimi, making ice-cream
- **Low freq** users are more basic in their use, often sticking to salads
- Extreme **disappointment if ripeness is not right** when they come to use it- wastage is a big consideration
 - Availability of frozen avocado can help to avoid disappointment/ wastage

WIDE & VARIED CONSUMPTION



On it's own with wasabi



With tomatoes & cream cheese as a side salad



Frozen avocado (used in smoothies)



Accompanying sashimi & rice



Side salad with tomatoes



Rice, fried egg, ham & avocado slices



Blended in a smoothie with protein powder, milk & lemon



Baked with eggs & mayo

JAPANESE CONSUMERS HAVE INHERENTLY POSITIVE PERCEPTIONS OF AUSTRALIA, MUCH OF WHICH IS GROUNDED IN THE NATURAL LANDSCAPE, FLORA & FAUNA



I've never been to Australia, but it's one of the countries I'd love to visit. This is because you can see nature and scenery that you cannot see in Japan. You can also enjoy gourmet food such as Aussie beef and lobster.

LOW FREQUENCY USER, JAPAN

The animals, the kangaroos and koalas which can only be found in this pristine landscape. That's what I see. The wonder of nature in Australia.

HIGH FREQUENCY USER, JAPAN

They have the beautiful buildings, the iconic Sydney Opera house and the Sydney harbour Bridge- and the city meets the sea, it's like people living together with nature.

MEDIUM FREQUENCY USER, JAPAN

Australia is a natural beauty with lush forests and the biggest reef in the world- the Great Barrier reef. I'd very much like to visit when we can!

LOW FREQUENCY USER, JAPAN

NATURAL WONDERS

The Great Barrier Reef, Uluru, Rainforests, The Blue Mountains



UNIQUE WILDLIFE

Kangaroos, Koalas, Wombats, Wallabies, Duck-Billed Platypus

BOUNTIFUL

Great weather/ climate leading to excellent growing conditions- rich soil, clean water, sunlight



SAFE, QUALITY PRODUCE

Well known for excellent vegetables, meat and wine

ICONIC LANDMARKS

Sydney Harbour Bridge, Sydney Opera House



TRAVEL BUCKET LIST

Many have fond memories of travel in Australia, or have aspirations to visit when they can

AUSTRALIAN AVOCADOS

JAPANESE CONSUMERS SEE AUSTRALIA AS PRODUCING AN ABUNDANCE OF HIGH-QUALITY PRODUCE DUE TO A WARM CLIMATE ALL YEAR ROUND

DELICIOUS, FLAVOURSOME

Imports from Australia make perfect sense to Japanese consumers due to the opposite seasons. There's an inherent association Australian with flavoursome, fresh and delicious produce (especially meat).

VALUE FOR MONEY

Japanese consumers are more likely to consider Australian produce and avocados good value; it's high quality for the price paid. Perceptions of Australian fruits is slightly less positive as the quality perceptions of vegetables – however, unlike Singapore and Malaysia, Japanese view avocados mainly as a vegetable.



It is rich in nature and the environment seems to be good, so I feel that the quality seems to be good. It seems that the safety standards are high, probably because of the beef brand "Aussie Beef".

LOW FREQUENCY USER, JAPAN

Since the country is large, it seems that there are many lands suitable for each type of agricultural product, and the nutrients necessary for growth are sucked up from the ground firmly, and the warm climate makes it possible to survive the cold, and the fact that it grew up in the sun is really delicious.

NON USER, JAPAN



CULTURE



CONSUMER



CATEGORY



AUSTRALIA

MARKET SNAPSHOT:

SINGAPORE





SINGAPOREAN CULTURAL CONTEXT

GLOBAL FUSION



Singapore is a truly cosmopolitan market, with a large ex-pat community and a continued influx of different cultures and influences from around the globe. Consumers here are exposed to a wide variety of ideas, foods, products & trends.

IN THE MOMENT



In part due to it's place as a cultural melting pot, Singapore often experiences short-lived trends as the latest 'must have/ see/ do' thing sweeps the nation. Korean food & culture is currently having a moment.

GAMIFIED HEALTH



The government is currently incentivising Singaporeans to live a more active and healthy life. Tangible rewards are offered to consumers for hitting goals such as free fitbits and shopping vouchers in exchange for hitting daily step counts. 'Healthy Choice Symbols' in supermarkets are also helping consumers to make healthier choices.

HARMONY & CLEANLINESS



Harmony is a guiding philosophy in Singapore. It affects many facets of society, particularly those of family and business. Unique civil laws enforce and regulate behaviour to keep social harmony- especially with regard to cleanliness.

DIVERSIFIED IMPORTS



The fallout from COVID-19 over the last 12 months has led the government to consider diversifying their trade relationships & practices. Historically AU, NZ and the USA were key import markets, however they're now looking elsewhere in a bid to create greater food security.

SINGAPOREAN CONSUMER ATTITUDES TOWARDS FOOD

PEOPLE ARE ACTIVELY CHANGING THE WAY THEY EAT IN PURSUIT OF HEALTH

The Singapore Health Board's push towards increasing consumer focus on health is having an effect. People are striving for balance- frying their food less, and instead option for steamed or stir-fried dishes, eating less processed food and carbs/ salt/ fat.

HAWKER CENTRES OFFER ALL OF SINGAPORE UNDER ONE ROOD

A second home to many, Singapore's hawker centers are a melting pot of cuisines where a number of subcultures & communities have formed. Family recipes perfected over generations are served next to the cheapest Michelin starred meals in the world and foods from all around the world are available at affordable prices.

WHILST THERE'S AN ABUNDANCE OF GLOBAL CUISINES AVAILABLE ON THE STREET, WHEN COOKING AT HOME MOST SINGAPOREANS OPT FOR ASIAN DISHES

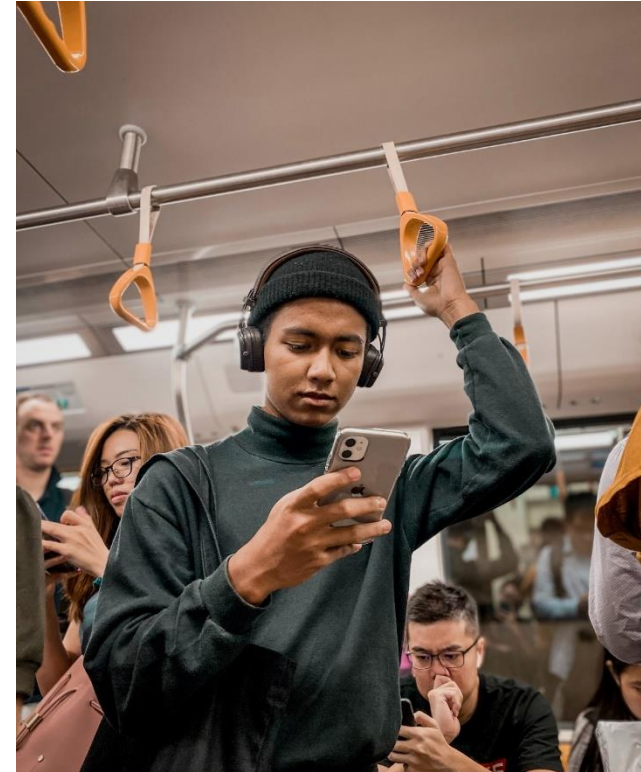
Very few of our consumers were cooking 'Western' foods at home, despite being very open to them when eating out. Instead they're cooking a fusion of Asian dishes e.g. Singapore Noodles, Chinese soups, Malaysian curries etc.

GROCERY SHOPPING CAN BE VERY EXPENSIVE IN SINGAPORE

Only 7% of Singapore's food is grown locally- the rest is imported from around the world. This has created higher food prices- and so consumers are often on the look out for a deal or promotion. Their grocery habits can reflect this, as they take advantage of a low prices- especially on foods which are typically more expensive (such as avocados)

CLEAN & SAFE PRODUCE IS A HYGIENE FACTOR

Singaporean food standards are high, they're used to produce which is safe, fresh, high quality and uncompromised so this is rarely a consideration when buying most products- although there is some resistance to products from China (due to historic food scandals), and developing markets which are seen to have fewer measures in place.



CATEGORY- AVOCADOS



Most Singaporeans have first encountered avocados when overseas, and have since. It's unique taste and texture

They're seen as a **premium fruit, full of excellent nutritional qualities** (a 'superfood')- but tricky to get right. Consumers often struggle to pick the 'right' avocado, and can feel anxious about cutting it open in case it's under/ over ripe.

Avocados are also **very expensive compared with other fruits**, and with its high cost, and the lack of familiarity with how to choose an avocado, when to eat it, and *how* to eat it, **it can be a very expensive mistake** if they get things wrong. High freq consumers have developed their own tools and strategies to overcome this, but for less freq consumers it remains a big barrier.

PERCEPTIONS

- **Healthy and nutritious fruit**- a superfood that's full of goodness- fibre, vitamins, 'good fats' that are good for your heart, vision, skin
 - Pre-approved by the Singapore Health Board as a 'Healthy Choice'
- Rich and creamy texture, buttery taste that's subtle- but for some it's too bland/ boring
- **Expensive** compared with other fruit & veg- a premium product
- Linked to **many potential countries of origin**
 - **High freq** users have a preference for USA, NZ, AU & MX

PURCHASE EXPERIENCE

- **High freq** users incorporate avocados as part of their regular weekly shop, whereas **low freq** users often triggered by a good deal/ promotion
- Generally **stocked near to other fruits** (e.g. oranges, apples), emphasising label as a fruit
- **Uncertainty and hesitation** around what & when to buy is not helped in stored- no clear merchandising or signage to guide
- Well-stocked displays cue a feeling of freshness & premium-ness, however **empty displays can put consumers off**

CONSUMPTION

- A real **hit & miss** as consumers struggle to identify when the right time to eat their avocado is
- Some storing in the fridge to protect from insects and prevent over-ripening, others storing in the pantry to encourage ripening
 - **High freq** users often refer to tricks they've seen on social media, e.g. storing with an onion
- **Mostly used in Western cuisines** e.g. salads, spread on toast, as a dip or a butter/ spread alternative
 - Some **high freq** users incorporating into smoothies or shakes

FAIRLY BASIC CONSUMPTION



Salad with tomato, red onion & glass noodles



Blended with olive oil, salt and water/ milk as a sauce



It should look like this

Blended with oil, coriander, cream & spices



With toast & scrambled eggs



Blended and served with pumpkin seeds as a dip



Salad with mangoes, spinach and onion



On bread with tomato, onion & capsicum salad

SINGAPOREANS HAVE A PARTICULAR AFFINITY WITH AUSTRALIA, MANY HAVE VISITED FOR WORK, PLAY OR STUDY AND THE RELAXED, STRESSED FREE LIFESTYLE APPEALS



Australia has such amazing natural landscapes. You can get close to nature- by a park, river or the beach in only 15-20 minutes. In comparison, it's so hard to get access to any of such natural beauty in Singapore.

**LOW FREQUENCY USER,
SINGAPORE**

Australia is much closer than Mexico. So the avocados should come to us quicker and be fresher. Also better for my carbon footprint!

**MEDIUM FREQUENCY USER,
SINGAPORE**

Australian produce is some of the best in the world. They are known for their wine, and I when I visited I made sure to try some. It didn't disappoint!

**HIGH FREQUENCY USER,
SINGAPORE**

The weather is so much better. Sunshine, seasons, way less humid! I see it as a very laid back place, full of relaxation.

**MEDIUM FREQUENCY USER,
SINGAPORE**

BEAUTIFUL LANDSCAPES

Beaches, the ocean, mountains- there is beauty around every corner 'a natural piece of art'



PEOPLE & NATURE IN HARMONY

Feeling that humans and nature are at one together, living in harmony

EXCELLENT FOOD & WINE

Well known for fruits, vegetables, wine, chocolates & treats- large farms, organic, fresh



RELAXED, STRESS-FREE

Perceived to have a good work/ life balance, a safe, clean place to live, lots of fun activities

ICONIC LANDMARKS

Sydney Harbour Bridge, Sydney Opera House



GREAT WEATHER

A much more enjoyable climate with clear seasons and lots of sunshine

AUSTRALIAN AVOCADOS

IN SINGAPORE, MOST LACK CLEAR ASSOCIATIONS WITH AUSTRALIAN AVOCADOS OR THEIR SPECIFIC QUALITIES

NATURAL, WHOLESOME

Positive associations with other Australian fresh produce reflects well on avocados. Organic, natural, homegrown associations are strong, which translates to a rich taste and flavourful, nutty flavour. Australian produce is also thought to be fresh.

EXPENSIVE, PREMIUM

Mexican avocados more likely to be associated with promotions, while Australian produce is more expensive. Currently there's perceived to be less of a reason for Singaporeans to trade up

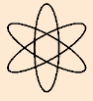


I would say maybe the avocados are bigger and more nutritious than avocados grown in Mexico because Australia has rich and unique soil

NON USER, SINGAPORE

Australian avocados are a premium produce available all year round in most parts of Australia because of the widespread and diverse growing regions

HIGH FREQUENCY USER, SINGAPORE



CULTURE



CONSUMER



CATEGORY



AUSTRALIA

MARKET SNAPSHOT:

MALAYSIA





MALAYSIAN CULTURAL CONTEXT

TRULY MULTI-CULTURAL



With a core population comprising of Chinese, Malay and Indian heritage- as well as a multitude of people from other nationalities & religious backgrounds- Malaysia has a rich and vibrant culture, heavily influenced by the diversity of the people who live there

SOCIAL HIERARCHY



Social status and class are defining pillars of Malaysian life. Outward symbols of class are key- for many it's more important to have the latest car than a home. How and what higher class consumers buy is often followed in the image of the Malay royalty with luxury clothes, expensive jewelry, and cars.

COLLECTIVISM



Malaysia represents a potluck of diverse cultural influences, with a strong appreciation of bringing together many different cultural flavours in all aspects of daily life. This cultural heterogeneity is founded on a mutual respect for other cultures, and individuals perceive themselves to be members of groups (i.e. their family, business, or ethnicity)

HAPPINESS



Compared with Japan and Singapore, Malaysian working culture & life is far less stressful, with fewer rules and a more open and relaxed approach to living. Happiness is what drives people – and food plays a big role in this. They 'live to eat', not the other way around. Malaysians' love for food is undeniable and it also strengthens the bond with one another

HEALTH



There's an increasing focus on health amongst consumers, particularly as rates of high cholesterol and diabetes remain high. Keto diets and intermittent fasting are being adopted as ways to lose weight and be more healthy, but for many this is more of a short-term fix than a lifestyle overhaul

MALAYSIAN ATTITUDES TOWARDS FOOD

LIVE TO EAT, NOT EATING TO LIVE

Malaysians love food, and it's an important part of the cultural fabric. Food is a social connector and a lot of love, time and care goes into preparing foods for social occasions with friends & family. People will often be eating late into the night, with restaurants staying open past midnight to cater to the needs of consumers.

A LITERAL MELTING POT OF FLAVOURS

Different regions in Malaysia are known for their unique or signature dishes, but there's also a never ending fusion of different food cultures as a result of the diverse population. Malaysian food is bursting with flavour, featuring prominent local herbs & spices, traditional methods of cooking, and creative ways of combining different foods.

BARGAIN HUNTING

Malaysians love a bargain, and price drives many of their purchases

WESTERN FOODS FEATURE MUCH LESS

Whilst Malaysians are quite adventurous with their cooking, Western food is not a prominent feature of mainstream diets. The foods they're eat

FOOD SAFETY IS VERY IMPORTANT

High rates of food poisoning (especially from night markets) has made consumers wary and created concerns over food safety, cleanliness, and nutrition.

They look for reassurance of a products safety via labelling, branding and preference for Halal foods/ foods from Muslim countries.





MALAYSIANS ARE ADVENTUROUS, DESPITE VERY LOW CATEGORY KNOWLEDGE



The Malaysian market is less sophisticated (vs Singapore or Japan) when it comes to avocados more broadly, however consumers are happy to embrace avocados and give them a go. They're seen as incredibly healthy, and so with a new focused onus on health consumers are actively seeking ways to include it in their diets, and they're now commonly seen in cafes and restaurants

The perceived positive benefits of avocados are somewhat overshadowed by Malaysians' lack of knowledge when it comes to selecting an avocado, with education needed to give them confidence in their choices, particularly when many simply can't afford to make a mistake

PERCEPTIONS

- **Expensive**- consumers in this market are very sensitive to price and avocados are a costly product
- **Health and beauty credentials** of avocados are a key association- although consumers struggle to articulate exactly *what* the health benefits are.
 - For **low/ non freq** users this is their main motivation
- **High freq** users speak of the versatility of avocados as a key benefit
- **Associated with a range of COO**, and consumers are used to seeing avocados from all over the world

PURCHASE EXPERIENCE

- Looking for COO is **not a conscious decision** when purchasing
- Consumers really struggle with knowing what makes a good avocado- for **low freq** users in particular it's complete trial & error
- Very limited category knowledge (e.g. perception that Hass is a brand, not a variety) means a **high opportunity for education** in this market. It's a **blank canvas** in terms of shaping behaviour and strengthening positive associations

CONSUMPTION

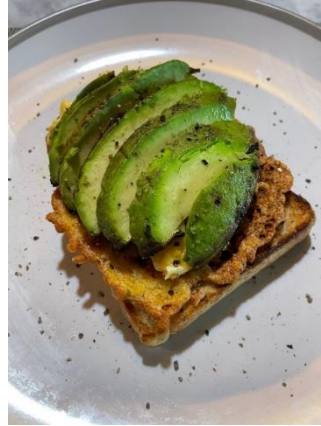
- Avocados are seen as short shelf life so cannot be kept for long, easily goes bad if exposed to the sun
- Malaysians are quite **adventurous** with how they prepare and consume avocados, with a tendency to use trial and error as a **learning experience**
- They're **included across a range of occasions** throughout the day- used in both **sweet & savoury** dishes - but always

WIDE & VARIED CONSUMPTION

Can be used in a sweet or savoury dish, and at any time of day

Often heavily seasoned with either herbs and spices or sweeteners/ creams

Occasions range from snacks, to side-dishes and ingredients in main meals



Sliced on toast with eggs & cheese



In a salad with cucumber, carrot, lettuce



Homemade sushi rolls with lettuce & chicken



Blended with ice, honey, oats, protein powder & cinnamon



Blended with ice, soy, condensed milk & chocolate



Wraps with rice, veggies and curried meat



AUSTRALIA IS PERCEIVED AS AN OASIS OF ADVENTURE, WILDLIFE, AND PRISTINE NATURE THAT ALLOWS FOR A LAID BACK APPROACH TO LIFE

Australia is one big interesting and exciting continent to explore. It has so many attractions for anyone to discover. Right from cute animals like kangaroos and koalas, astonishing cities like Perth and Sydney, beautiful beaches with all kind of activities like Gold Coast and Cairns. In short, it is a heaven on earth!

HIGH FREQUENCY USER, MALAYSIA

For the Ocean Great Road photos, I feel relaxed and calm which make me feel like to immigrate to there for retirement. I feel it's an exciting and lovely place to visit

MEDIUM FREQUENCY USER, MALAYSIA

I know that Australia can dive in some places and catch abalone and also lobster, and I know that this Australia green abalone is delicious from a YouTube channel. Australia also famous with lobster

HIGH FREQUENCY USER, MALAYSIA

One of my reasons to visit Australia is to get up close with beautiful kangaroos and their babies in pouches known as joeys. Being a nature lover, it's a dream come through to be able to get on a trip to the Australian outback to take in the sights, spotting wildlife, and catch sunsets

LOW FREQUENCY USER, MALAYSIA

MODERN & ICONIC

Sydney Opera House is steeped in history yet with a modern and innovative design



LAIDBACK LIVING

Offers a laid back, relaxed culture and beach life. Also great for vacation or studying abroad



ADORED WILDLIFE

Koalas and kangaroos are iconic and indigenous to Australia. They feel special & are widely adored



SCENIC LANDSCAPE

Feeling that Australia is 'heaven on earth' with an abundance of beauty and nature that can be explored on adventures



DELICIOUS, FRESH PRODUCE

An impression that Australia has appealing, fresh seafood that is extremely high quality



FARMING & AGRICULTURE

The land and climate is at one with the diversity of agricultural products available

AUSTRALIAN AVOCADOS

IN MALAYSIA, AVOCADO PERCEPTIONS ARE PREDOMINATELY BASED ON EXPECTATIONS OF AUSTRALIAN PRODUCE MORE BROADLY

PREMIUM, HIGH QUALITY

Some underlying perceptions of more premium produce more broadly, which carries through to avocados. They come with a higher price tag, but offer a nicer texture with **greater flavour intensity** and creaminess.

GOOD AGRICULTURAL PRACTICES

Avocados from Australia are seen as **pesticide free** and follow good agriculture practices and without any artificial intervention (like Chinese produce). This facilitates connotations of **high nutritional content** given the **clean environment**



I think they are known for quality as their prices are quite expensive so I assume the quality is much better in terms of taste and nutrition

HIGH FREQUENCY USER, MALAYSIA

Tried them a few times and they taste, fresh, delicious and creamy. I believe it is because they were grown with natural sources. That explain the smooth quality of the outer skin that kind of glowing if compared to those coming from other nations.

HIGH FREQUENCY USER, MALAYSIA

MALAYSIANS ARE MOST IN NEED OF EDUCATION FOR SELECTING A QUALITY AVOCADO – IT'S VERY MUCH A LEARNING PROCESS WITH EXPERIENCES DICTATED BY TRIAL & ERROR

A CASE STUDY: EXPERIENCE OF A NON-AVOCADO PURCHASER

← LACK OF EDUCATION AND FAMILIARITY IN CHOOSING AVOCADOS → ← HIGH RISK OF GETTING IT WRONG CAN CREATE AVOIDANCE IN FUTURE →



A **lack of knowledge** of key **quality cues** (e.g. skin colour, softness, skin texture)



A second purchase occasion was **undermined by the same pitfalls**



Discounted produce a key driver of purchase in Malaysia



Negative experiences engrain patterns **future avoidance**

“

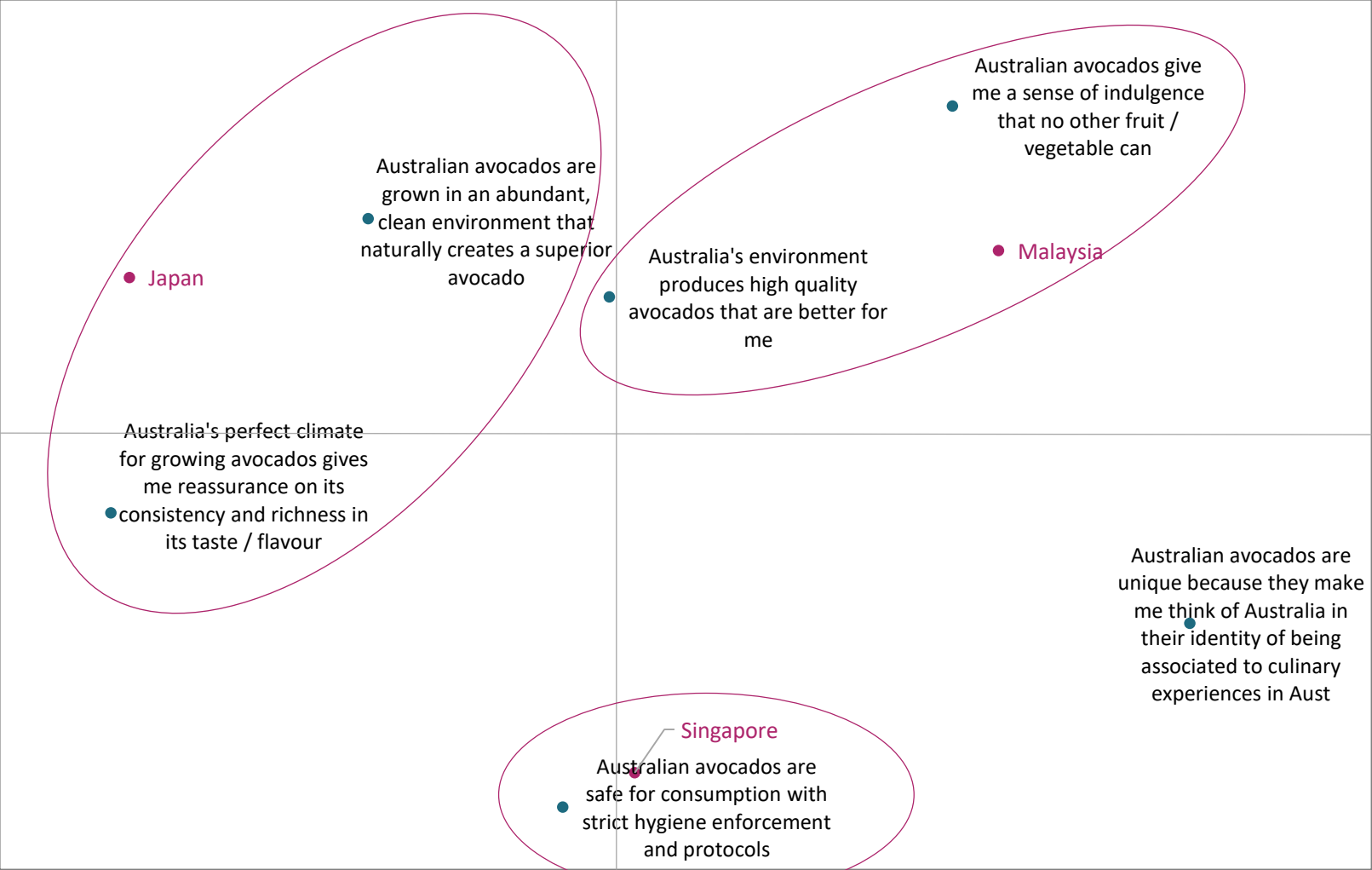
The avocado was supposed to be the highlight for our simple salad dish. Sadly, the avocado that we bought earlier turned out bad. We quickly went out to a nearby grocery store, hoping that they have avocados available. Yes ! ... they have avocados (Australian avocados) ... a pack of two at RM15.99 ! Unfortunately again, the two pieces of Australian avocados turned out to be bad as well. It seems that choosing and buying avocados require some experience and 'skills' - the avocados may look good outside but may not necessarily so inside. Overall, it was a good experience and we had a fun time preparing the avocados which would have been an extra healthy ingredient to our simple salad dish.

SECTION 6

APPENDIX: QUANTITATIVE DATA

PERCEIVED IMPACT [SPIRIT OF AUSTRALIA]

SG – Safe for consumption with strict hygiene protocols
MY – Indulgence and high quality avocados
JP – Richness in flavour and taste, prime environment for superior avocado



SPIRIT OF AUSTRALIA

They may not have been born in Australia, but we've made avocados our own. They're everywhere. They're part of aussie culture. A life that is inclusive, relaxed and free.

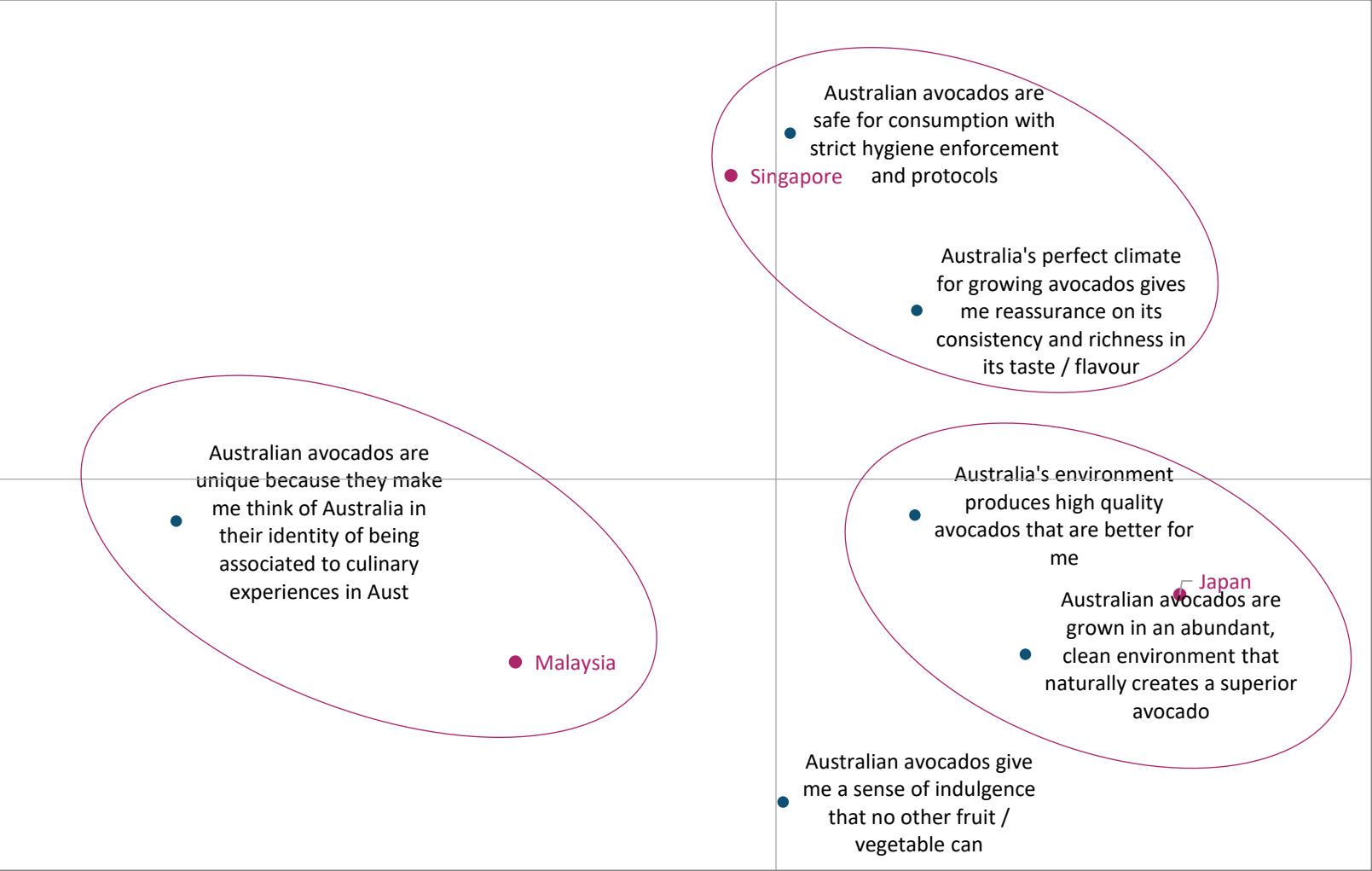
Australian avocados are born in this culture. They come from the best farms on the planet, grown by Aussie farmers that have been nurtured & handled the Australian way.

That's why when you taste an Australian avocado, every mouthful is a premium, every slice is golden.

So, no matter who you are or where you are from, you can taste the spirit of Australia when you choose Australian avocados.

PERCEIVED IMPACT [LAND OF PLENTY]

SG – Safe for consumption with strict hygiene protocols, richness in taste arising from climate
MY – Unique / culinary identity
JP –prime environment for superior avocado, high quality avocado that is better for me



LAND OF PLENTY

In Australia, when you've got landscape likes we do, you want to make the most of them. Wide open spaces, beaches that stretch for miles, and rainforests that are full of life.

It's in these beautiful lands that the world's best avocados come from. They've perfectly nurtured by the Australian climate & environment and harvested by farmers that have been growing avocados for generations.

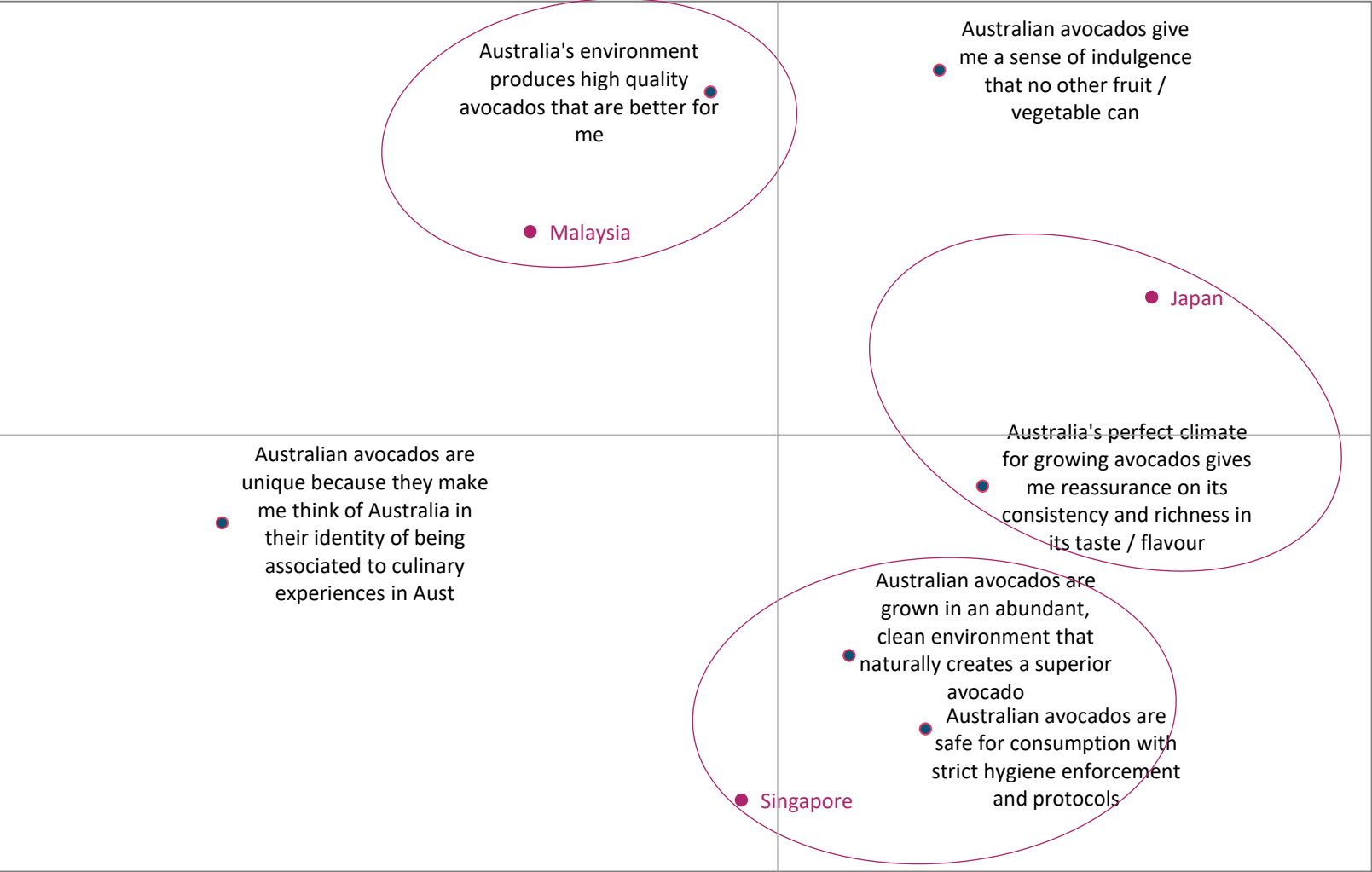
The result are the creamiest, and tastiest avocados you've ever had, bursting with all the vitamins and nutrients you need to be at your best.

If you care about what you eat, don't settle for anything less than goodness of Australian avocados.



PERCEIVED IMPACT [LEVEL UP]

SG – Safe for consumption with strict hygiene protocols, superior avocado
MY – High quality avocado that is better for me
JP – Richness in taste arising from climate



LEVEL UP

Whether is jazzing up a meal or creating something to impress, only the best quality produce and ingredients will do the job.

Australian Avocados are the perfect way to transform meals into something special. Australian Avocados are grown in some of the best farms and conditions in the world, ensuring they look and taste fantastic.

It's the quality & freshness of Australian Avocados that can elevate a meal from ordinary to extraordinary.

So whenever you want to take your food to the next level, you can't beat an Australian Avocado; the definition of quality.

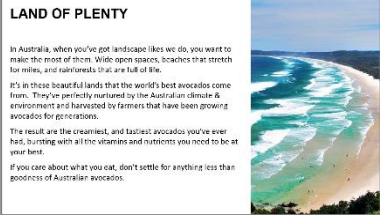


SG : SPIRIT OF AUSTRALIA – DIAGNOSTICS T2B% BREAKDOWN



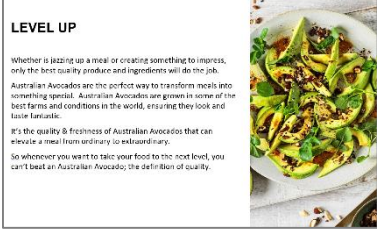
SPIRIT OF AUSTRALIA (SG)		GENDER		AGE GROUPS					LIFESTAGE						INCOME		
DIAGNOSTICS T2B%	Total	Male	Female	18-24	25-34	35-44	45-54	55-65	Young SINKS/ DINKS	Mid SINKS/ DINKS	Older SINKS/ DINKS	Young Family	Older Family	Empty Nester	Low	Mid	High
APPEAL T2B%	70%	75%	66%	66%	68%	73%	74%	68%	66%	60%	68%	79%	73%	72%	69%	68%	81%
UNIQUENESS T2B%	68%	69%	66%	60%	66%	70%	72%	67%	60%	61%	62%	77%	72%	64%	68%	66%	74%
PURCHASE INTENT T2B%%	65%	68%	61%	61%	60%	63%	70%	66%	57%	51%	67%	73%	71%	63%	62%	63%	75%
PURCHASE FREQUENCY (WEEKLY)	0.99	1.00	0.98	0.99	1.11	1.20	0.85	0.84	0.72	0.56	0.78	1.56	0.88	1.24	0.75	0.98	1.52
Weekly NET	43%	48%	38%	35%	40%	48%	45%	42%	28%	28%	44%	57%	44%	52%	36%	44%	55%
Monthly NET	30%	29%	32%	30%	30%	24%	31%	36%	35%	31%	39%	22%	33%	29%	37%	26%	29%
Less than Monthly NET	20%	18%	22%	21%	22%	20%	19%	19%	27%	31%	13%	15%	20%	12%	20%	23%	11%
CREDIBILITY T2B%%	82%	84%	80%	76%	81%	84%	85%	80%	74%	77%	85%	87%	84%	81%	82%	81%	86%
FIT T2B%%	57%	61%	54%	50%	59%	59%	59%	57%	52%	44%	52%	68%	64%	58%	49%	58%	71%
Column n	690	330	360	52	135	181	165	157	75	142	75	180	138	80	199	344	130

SG : LAND OF PLENTY– DIAGNOSTICS T2B% BREAKDOWN



LAND OF PLENTY (SG)		GENDER		AGE GROUPS					LIFESTAGE						INCOME		
DIAGNOSTICS T2B%	Total	Male	Female	18-24	25-34	35-44	45-54	55-65	Young SINKS/ DINKS	Mid SINKS/ DINKS	Older SINKS/ DINKS	Young Family	Older Family	Empty Nester	Low	Mid	High
APPEAL T2B%	80%	81%	79%	82%	80%	78%	78%	82%	80%	71%	83%	81%	84%	80%	79%	79%	82%
UNIQUENESS T2B%	72%	75%	69%	71%	69%	69%	75%	74%	69%	67%	72%	72%	78%	71%	77%	70%	70%
PURCHASE INTENT T2B%%	69%	71%	67%	71%	69%	65%	68%	71%	64%	62%	69%	68%	74%	78%	70%	68%	72%
PURCHASE FREQUENCY (WEEKLY)	1.02	1.10	0.95	0.98	1.38	1.10	0.78	0.94	0.78	0.70	0.86	1.42	0.82	1.40	0.92	0.97	1.43
Weekly NET	45%	48%	42%	38%	50%	44%	40%	50%	37%	33%	46%	52%	43%	55%	40%	45%	55%
Monthly NET	33%	33%	32%	43%	27%	33%	34%	30%	39%	43%	35%	25%	34%	26%	38%	32%	25%
Less than Monthly NET	18%	13%	22%	17%	16%	18%	21%	15%	19%	17%	14%	18%	19%	16%	17%	18%	18%
CREDIBILITY T2B%%	84%	87%	81%	81%	81%	85%	84%	88%	78%	82%	87%	88%	86%	83%	85%	83%	87%
FIT T2B%%	65%	69%	60%	68%	64%	63%	63%	66%	62%	59%	61%	70%	65%	67%	65%	64%	68%
Column n	689	343	346	61	134	174	166	154	87	126	76	185	128	87	196	344	129

SG : LEVEL UP – DIAGNOSTICS T2B% BREAKDOWN



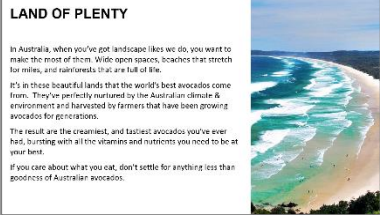
LEVEL UP (SG)		GENDER		AGE GROUPS					LIFESTAGE						INCOME		
DIAGNOSTICS T2B%	Total	Male	Female	18-24	25-34	35-44	45-54	55-65	Young SINKS/ DINKS	Mid SINKS/ DINKS	Older SINKS/ DINKS	Young Family	Older Family	Empty Nester	Low	Mid	High
APPEAL T2B%	76%	75%	76%	74%	76%	76%	74%	77%	75%	72%	65%	82%	78%	75%	73%	77%	75%
UNIQUENESS T2B%	64%	69%	60%	68%	60%	65%	62%	66%	65%	52%	49%	72%	71%	68%	65%	66%	55%
PURCHASE INTENT T2B%%	70%	72%	68%	73%	67%	68%	71%	71%	69%	60%	53%	76%	78%	75%	66%	72%	68%
PURCHASE FREQUENCY (WEEKLY)	1.02	1.1	1.0	0.9	1.2	1.3	0.8	0.9	0.8	0.7	0.7	1.5	0.9	1.3	0.9	1.1	1.2
Weekly NET	43%	49%	37%	38%	39%	49%	38%	45%	35%	29%	35%	56%	43%	52%	37%	45%	45%
Monthly NET	35%	33%	36%	34%	38%	28%	36%	38%	38%	38%	44%	27%	38%	30%	39%	33%	33%
Less than Monthly NET	18%	13%	23%	26%	18%	18%	21%	12%	25%	28%	14%	11%	15%	16%	21%	18%	19%
CREDIBILITY T2B%%	92%	92%	92%	95%	94%	90%	92%	91%	94%	91%	86%	93%	93%	93%	91%	93%	92%
FIT T2B%%	63%	64%	61%	61%	63%	63%	61%	64%	61%	61%	48%	72%	67%	56%	56%	66%	67%
Column n	667	317	350	55	149	163	157	143	90	136	67	161	130	83	183	362	103

MY : SPIRIT OF AUSTRALIA – DIAGNOSTICS T2B% BREAKDOWN



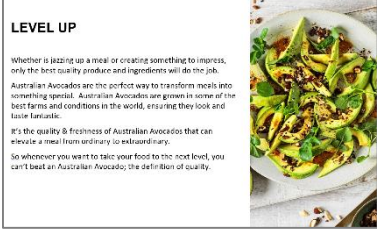
SPIRIT OF AUSTRALIA (MY)		GENDER		AGE GROUPS					LIFESTAGE						INCOME		
DIAGNOSTICS T2B%	Total	Male	Female	18-24	25-34	35-44	45-54	55-65	Young SINKS/ DINKS	Mid SINKS/ DINKS	Older SINKS/ DINKS	Young Family	Older Family	Empty Nester	Low	Mid	High
APPEAL T2B%	83%	83%	83%	84%	79%	92%	84%	79%	81%	78%	75%	93%	83%	81%	82%	84%	82%
UNIQUENESS T2B%	80%	82%	78%	83%	81%	83%	69%	80%	84%	76%	59%	87%	73%	77%	79%	81%	77%
PURCHASE INTENT T2B%%	77%	77%	77%	76%	72%	84%	77%	81%	73%	70%	75%	86%	80%	76%	78%	77%	75%
PURCHASE FREQUENCY (WEEKLY)	1.29	1.23	1.33	1.16	1.47	1.46	1.08	0.98	1.12	0.81	0.62	1.97	1.16	1.37	1.28	1.45	1.00
Weekly NET	54%	55%	54%	52%	58%	58%	45%	56%	53%	42%	24%	62%	58%	60%	60%	54%	51%
Monthly NET	32%	32%	32%	36%	28%	34%	36%	30%	33%	38%	41%	30%	33%	27%	28%	33%	36%
Less than Monthly NET	11%	10%	13%	10%	11%	6%	17%	14%	12%	16%	35%	8%	8%	11%	11%	12%	9%
CREDIBILITY T2B%%	92%	94%	89%	94%	90%	95%	91%	88%	91%	84%	89%	97%	94%	92%	91%	93%	90%
FIT T2B%%	70%	73%	67%	76%	69%	78%	62%	61%	72%	61%	60%	79%	66%	68%	69%	72%	68%
Column n	636	306	330	115	225	126	108	62	166	111	12	132	81	134	169	307	153

MY : LAND OF PLENTY– DIAGNOSTICS T2B% BREAKDOWN



LAND OF PLENTY (MY)		GENDER		AGE GROUPS					LIFESTAGE						INCOME		
DIAGNOSTICS T2B%	Total	Male	Female	18-24	25-34	35-44	45-54	55-65	Young SINKS/ DINKS	Mid SINKS/ DINKS	Older SINKS/ DINKS	Young Family	Older Family	Empty Nester	Low	Mid	High
APPEAL T2B%	90%	90%	90%	86%	91%	91%	93%	89%	88%	88%	84%	93%	91%	90%	94%	88%	89%
UNIQUENESS T2B%	84%	85%	84%	84%	87%	85%	83%	79%	84%	82%	68%	86%	84%	86%	87%	82%	84%
PURCHASE INTENT T2B%%	81%	82%	80%	78%	83%	81%	81%	83%	79%	78%	76%	82%	87%	83%	84%	81%	79%
PURCHASE FREQUENCY (WEEKLY)	1.37	1.38	1.36	1.34	1.63	1.39	1.05	1.08	1.36	0.89	0.48	1.74	1.24	1.49	1.39	1.44	1.21
Weekly NET	54%	55%	54%	54%	60%	51%	53%	47%	53%	44%	28%	58%	57%	63%	54%	55%	55%
Monthly NET	35%	34%	35%	33%	29%	37%	37%	44%	36%	37%	58%	33%	34%	29%	37%	36%	30%
Less than Monthly NET	9%	9%	10%	11%	8%	10%	10%	8%	9%	14%	14%	8%	8%	7%	8%	8%	12%
CREDIBILITY T2B%%	94%	94%	94%	96%	93%	95%	93%	91%	95%	93%	93%	96%	93%	90%	93%	94%	94%
FIT T2B%%	78%	79%	77%	81%	80%	73%	80%	76%	79%	71%	78%	79%	75%	83%	76%	79%	80%
Column n	681	328	353	117	231	154	109	70	155	107	21	186	82	130	194	313	167

MY : LEVEL UP – DIAGNOSTICS T2B% BREAKDOWN



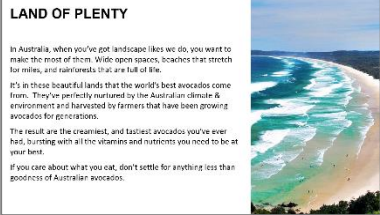
LEVEL UP (MY)		GENDER		AGE GROUPS					LIFESTAGE						INCOME		
DIAGNOSTICS T2B%	Total	Male	Female	18-24	25-34	35-44	45-54	55-65	Young SINKS/ DINKS	Mid SINKS/ DINKS	Older SINKS/ DINKS	Young Family	Older Family	Empty Nester	Low	Mid	High
APPEAL T2B%	84%	84%	84%	80%	85%	83%	83%	89%	79%	80%	79%	87%	89%	87%	82%	83%	88%
UNIQUENESS T2B%	81%	81%	80%	84%	80%	84%	78%	78%	79%	72%	48%	89%	85%	82%	81%	82%	78%
PURCHASE INTENT T2B%%	78%	77%	78%	80%	75%	79%	76%	82%	73%	69%	68%	83%	86%	80%	76%	79%	79%
PURCHASE FREQUENCY (WEEKLY)	1.43	1.36	1.49	1.47	1.62	1.72	1.00	1.05	1.43	0.96	0.45	1.92	1.12	1.58	1.44	1.39	1.51
Weekly NET	55%	54%	56%	56%	60%	58%	48%	46%	54%	41%	32%	63%	52%	63%	54%	53%	62%
Monthly NET	30%	31%	29%	32%	24%	33%	34%	33%	32%	38%	33%	27%	35%	24%	28%	32%	29%
Less than Monthly NET	13%	13%	13%	12%	13%	8%	14%	20%	13%	17%	35%	9%	10%	12%	14%	14%	8%
CREDIBILITY T2B%%	93%	93%	93%	93%	92%	93%	93%	93%	91%	86%	83%	98%	96%	94%	90%	93%	96%
FIT T2B%%	75%	75%	75%	79%	77%	76%	70%	70%	76%	72%	49%	81%	71%	78%	72%	75%	80%
Column n	683	344	339	124	232	130	119	78	159	108	23	168	85	140	189	324	164

JP : SPIRIT OF AUSTRALIA – DIAGNOSTICS T2B% BREAKDOWN



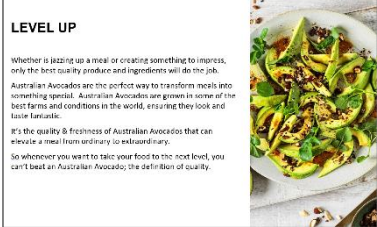
SPIRIT OF AUSTRALIA (JP)		GENDER		AGE GROUPS					LIFESTAGE						INCOME		
DIAGNOSTICS T2B%	Total	Male	Female	18-24	25-34	35-44	45-54	55-65	Young SINKS/ DINKS	Mid SINKS/ DINKS	Older SINKS/ DINKS	Young Family	Older Family	Empty Nester	Low	Mid	High
APPEAL T2B%	63%	65%	62%	75%	67%	49%	66%	66%	74%	54%	63%	59%	65%	71%	68%	62%	62%
UNIQUENESS T2B%	59%	60%	59%	76%	61%	48%	62%	61%	76%	53%	61%	50%	60%	66%	65%	57%	58%
PURCHASE INTENT T2B%%	56%	56%	56%	62%	61%	41%	58%	62%	62%	47%	55%	51%	61%	64%	61%	55%	53%
PURCHASE FREQUENCY (WEEKLY)	0.45	0.46	0.45	0.31	0.47	0.35	0.48	0.57	0.38	0.42	0.36	0.39	0.51	0.64	0.48	0.45	0.46
Weekly NET	19%	20%	18%	12%	18%	14%	19%	27%	15%	19%	18%	13%	21%	28%	20%	19%	17%
Monthly NET	43%	43%	43%	33%	49%	39%	44%	45%	41%	36%	42%	46%	50%	43%	43%	45%	42%
Less than Monthly NET	31%	28%	33%	47%	25%	40%	31%	21%	37%	36%	28%	33%	27%	24%	32%	30%	35%
CREDIBILITY T2B%%	80%	79%	80%	88%	79%	70%	81%	84%	83%	72%	79%	79%	84%	85%	84%	79%	77%
FIT T2B%%	38%	42%	36%	44%	42%	31%	40%	39%	42%	32%	40%	39%	40%	40%	41%	39%	38%
Column n	692	244	448	52	120	159	188	173	79	143	67	149	151	103	225	252	166

JP : LAND OF PLENTY– DIAGNOSTICS T2B% BREAKDOWN



LAND OF PLENTY (JP)		GENDER		AGE GROUPS					LIFESTAGE						INCOME		
DIAGNOSTICS T2B%	Total	Male	Female	18-24	25-34	35-44	45-54	55-65	Young SINKS/ DINKS	Mid SINKS/ DINKS	Older SINKS/ DINKS	Young Family	Older Family	Empty Nester	Low	Mid	High
APPEAL T2B%	79%	77%	81%	85%	80%	74%	83%	75%	85%	79%	73%	81%	79%	77%	75%	83%	83%
UNIQUENESS T2B%	61%	57%	64%	77%	56%	52%	63%	65%	76%	53%	60%	58%	59%	71%	64%	59%	63%
PURCHASE INTENT T2B%%	64%	60%	66%	66%	68%	57%	68%	63%	71%	61%	57%	63%	65%	70%	65%	67%	64%
PURCHASE FREQUENCY (WEEKLY)	0.48	0.49	0.47	0.55	0.41	0.39	0.52	0.53	0.54	0.44	0.46	0.40	0.53	0.54	0.48	0.53	0.45
Weekly NET	20%	21%	19%	23%	19%	13%	21%	22%	22%	18%	20%	17%	21%	23%	18%	24%	16%
Monthly NET	48%	46%	49%	36%	49%	58%	44%	50%	45%	44%	44%	50%	50%	55%	44%	47%	55%
Less than Monthly NET	28%	28%	28%	36%	31%	24%	29%	24%	30%	31%	29%	31%	26%	20%	32%	26%	24%
CREDIBILITY T2B%%	88%	86%	89%	87%	91%	87%	87%	88%	90%	87%	81%	93%	84%	91%	85%	91%	89%
FIT T2B%%	49%	46%	50%	64%	57%	40%	46%	47%	67%	44%	48%	45%	44%	54%	51%	50%	48%
Column n	650	231	419	50	107	120	210	163	67	133	69	128	148	105	206	237	170

JP : LEVEL UP – DIAGNOSTICS T2B% BREAKDOWN



LEVEL UP (JP)		GENDER		AGE GROUPS					LIFESTAGE						INCOME		
DIAGNOSTICS T2B%	Total	Male	Female	18-24	25-34	35-44	45-54	55-65	Young SINKS/ DINKS	Mid SINKS/ DINKS	Older SINKS/ DINKS	Young Family	Older Family	Empty Nester	Low	Mid	High
APPEAL T2B%	67%	65%	69%	79%	70%	67%	63%	66%	79%	68%	64%	66%	62%	67%	68%	68%	72%
UNIQUENESS T2B%	55%	55%	55%	55%	57%	52%	54%	58%	60%	48%	53%	59%	57%	54%	55%	55%	58%
PURCHASE INTENT T2B%%	55%	52%	57%	54%	55%	53%	56%	58%	57%	55%	52%	54%	54%	63%	59%	56%	56%
PURCHASE FREQUENCY (WEEKLY)	0.48	0.45	0.49	0.39	0.48	0.39	0.55	0.53	0.43	0.47	0.48	0.42	0.58	0.49	0.45	0.46	0.59
Weekly NET	21%	19%	21%	13%	24%	15%	20%	28%	19%	20%	22%	17%	24%	24%	20%	18%	27%
Monthly NET	44%	46%	43%	32%	38%	52%	46%	42%	38%	37%	47%	49%	47%	46%	43%	49%	42%
Less than Monthly NET	31%	29%	32%	48%	29%	28%	31%	28%	35%	37%	29%	31%	26%	25%	34%	29%	27%
CREDIBILITY T2B%%	82%	79%	84%	87%	80%	81%	82%	85%	85%	78%	81%	84%	83%	86%	83%	85%	84%
FIT T2B%%	42%	40%	43%	53%	48%	39%	43%	35%	56%	45%	40%	38%	41%	34%	46%	43%	42%
Column n	666	233	433	48	103	153	202	160	70	142	62	145	149	98	219	237	166

SEA MARKETS OVER-INDEX ON AVAILABILITY CHALLENGES, ESPECIALLY FOR MY WHERE ACCESS TO QUALITY AVOCADOS IS HARDER. JP IS NOT SET BACK BY LACK OF AWARENESS ON CHOOSING AVOCADOS / RIPENESS

Which of the following painpoints / barriers are relevant to you? – DURING PURCHASE		SINGAPORE	MALAYSIA	JAPAN
PURCHASE PAINPOINTS NET	81%	85%	87%	70%
QUALITY NET	43%	44%	39%	45%
AVAILABILITY NET	23%	28%	35%	5%
Too expensive to buy regularly	36%	47%	51%	11%
I am not confident in choosing the perfect avocado	27%	27%	21%	32%
Not ripe enough when I want to buy them	22%	22%	19%	25%
Sometimes they are bruised inside which puts me off	21%	24%	10%	28%
The quality of avocados where I do my grocery shopping at is not very good	12%	12%	19%	6%
Not in season	9%	13%	13%	1%
Do not think of buying them when I am at the store	9%	6%	12%	7%
I have to go to another grocery store just to buy avocados / better quality avocados	7%	8%	10%	3%
Always out of stock at the store	7%	7%	13%	1%
I wanted avocados from a specific country, but it was not available	6%	8%	10%	1%
I do my grocery shopping online which does not guarantee the quality of avocados	5%	8%	7%	1%
There is no signage for avocados which makes it difficult to find in store	3%	3%	6%	1%

Observations



There is some aspect of physical aesthetics coming into play (i.e. put off by bruising) – where avocados are expected to look good on the outside as well as on the inside



Key availability barriers are mostly to do with logistical constraints

On the other hand, where there are avocados, quality appears to be a purchase barrier which suggests that consumers may be more inclined to buy quality avocados than the average avocado



Consumers do not like uncertainty when it comes to grocery purchase - they are looking to be guided on avocado selection in-store (via ripeness, colour, texture / feel)

ACROSS SEA MARKETS, 22% OF AVOCADO PURCHASE COMES FROM 25-44 Y/O, WHO ALSO HAVE HIGHER ANNUAL AVOCADO VOLUME

On the other hand, for JP it is evident that the majority purchases less often, and age groups does not pull apart clearly. Avocado volumes across age groups do not pull apart clearly too

		Singapore 🇸🇬				Malaysia 🇲🇾				Japan 🇯🇵			
		Weekly or more	Fortnightly	Monthly	Less often	Weekly or more	Fortnightly	Monthly	Less often	Weekly or more	Fortnightly	Monthly	Less often
AGE ACROSS AVOCADO PURCHASE FREQUENCY	18-24	4%	1%	2%	3%	6%	4%	3%	5%	2%	1%	1%	4%
	25-34	10%	3%	3%	3%	14%	6%	6%	9%	3%	3%	5%	9%
	35-44	12%	3%	3%	6%	8%	3%	3%	4%	4%	3%	6%	9%
	45-54	8%	4%	3%	6%	5%	3%	2%	5%	5%	5%	7%	11%
	55-65	9%	6%	4%	6%	3%	2%	2%	5%	4%	5%	5%	7%
OVERLAYED WITH ANNUAL AVOCADO VOLUME	18-24	496.6	85.8	43.3	1.1	499.8	104.7	46.8	1.0	164.7	54.5	17.4	0.4
	25-34	525.0	98.5	40.6	0.9	564.8	110.6	51.4	0.9	136.4	39.0	16.7	0.4
	35-44	499.9	119.9	41.9	0.9	543.8	102.4	53.8	0.9	191.3	49.1	19.5	0.4
	45-54	373.8	94.7	45.2	1.0	491.2	104.5	48.8	0.8	139.2	48.6	18.0	0.5
	55-65	321.2	110.7	46.3	1.0	374.9	105.8	47.7	0.8	173.2	45.4	23.5	0.5
		354	143	132	198	290	157	129	231	148	156	206	338
WHAT AGE GROUPS?		25-44 years old				25-44 years old				Cannot be defined clearly			