



Rabobank

Unlocking consumer demand for produce

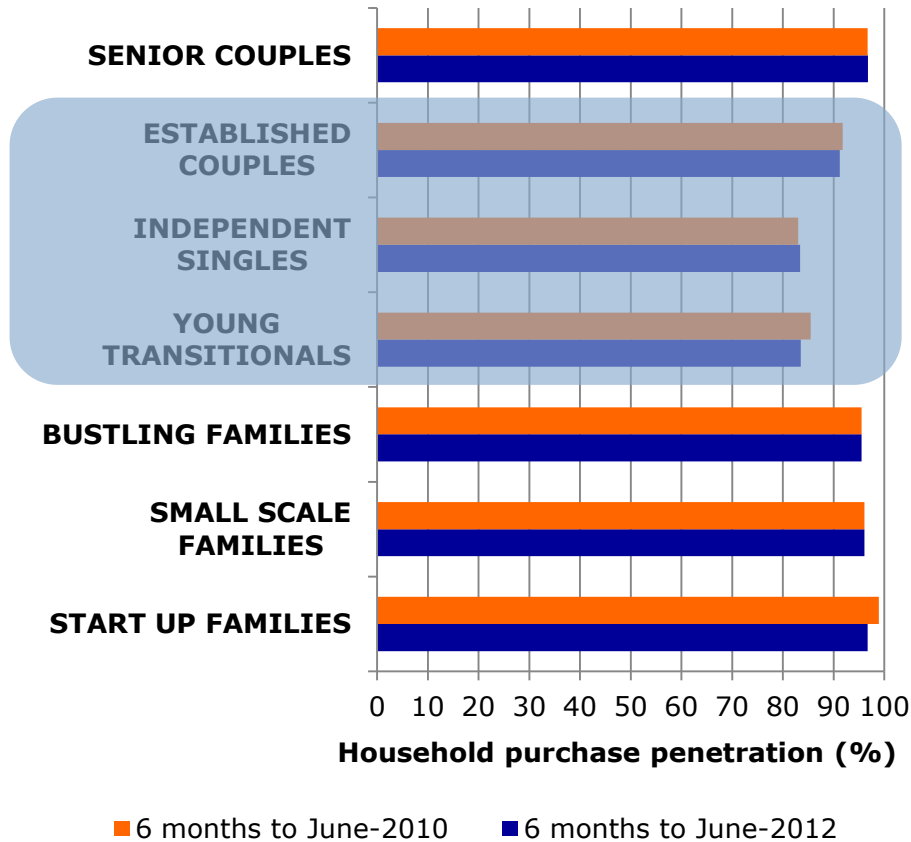
Rabobank Food & Agribusiness Research

July 2013



Who are you selling to??

The background research...



Source: HAL, Nielsen & Rabobank, 2013

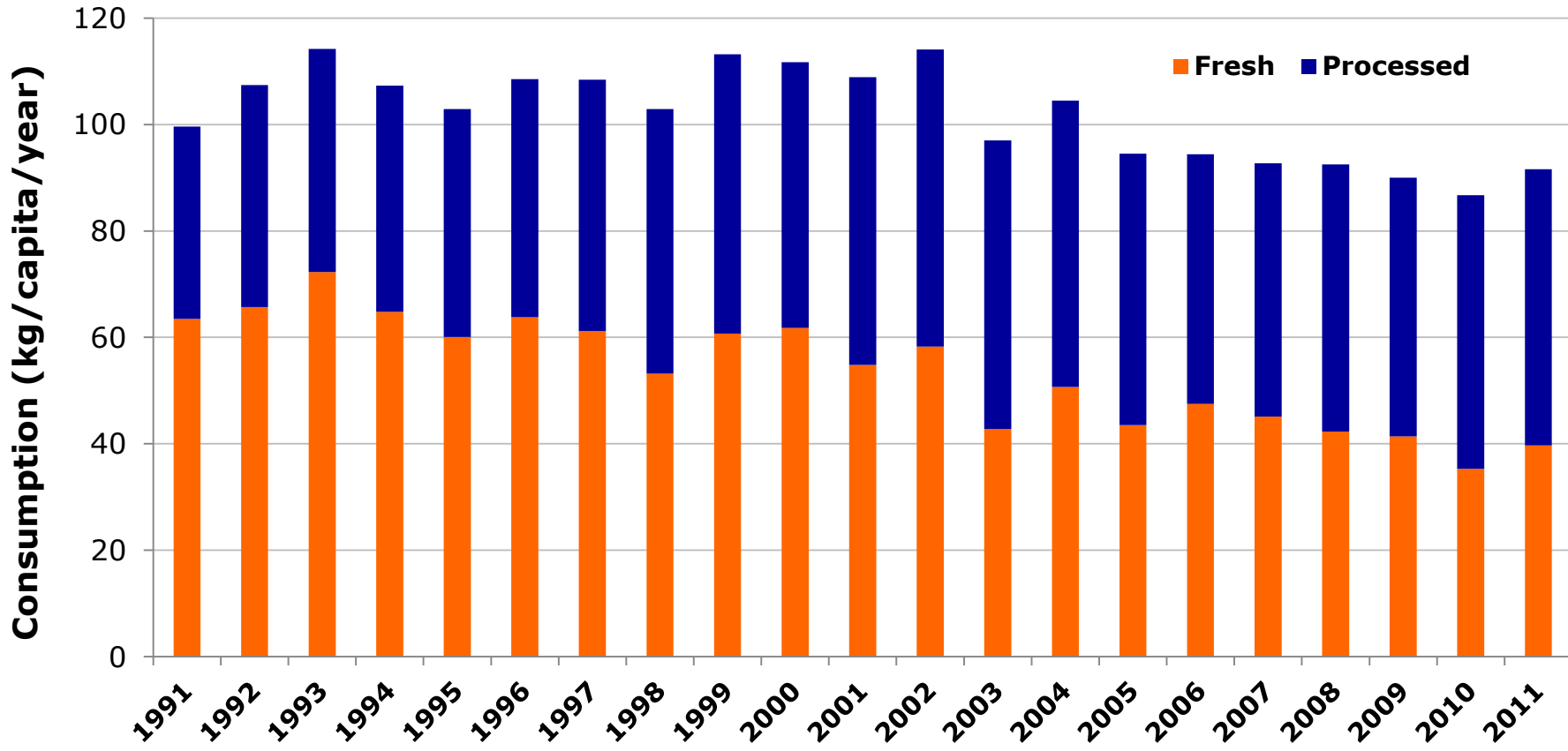
... the campaign



Source: Ikon Communications & Rabobank, 2013

Stopping the rot in staples

Per capita potato consumption in the UK, 1991-2011



Source: UK Potato Council & Rabobank, 2013

Who's your competition?

Online dietary advice from Harvard

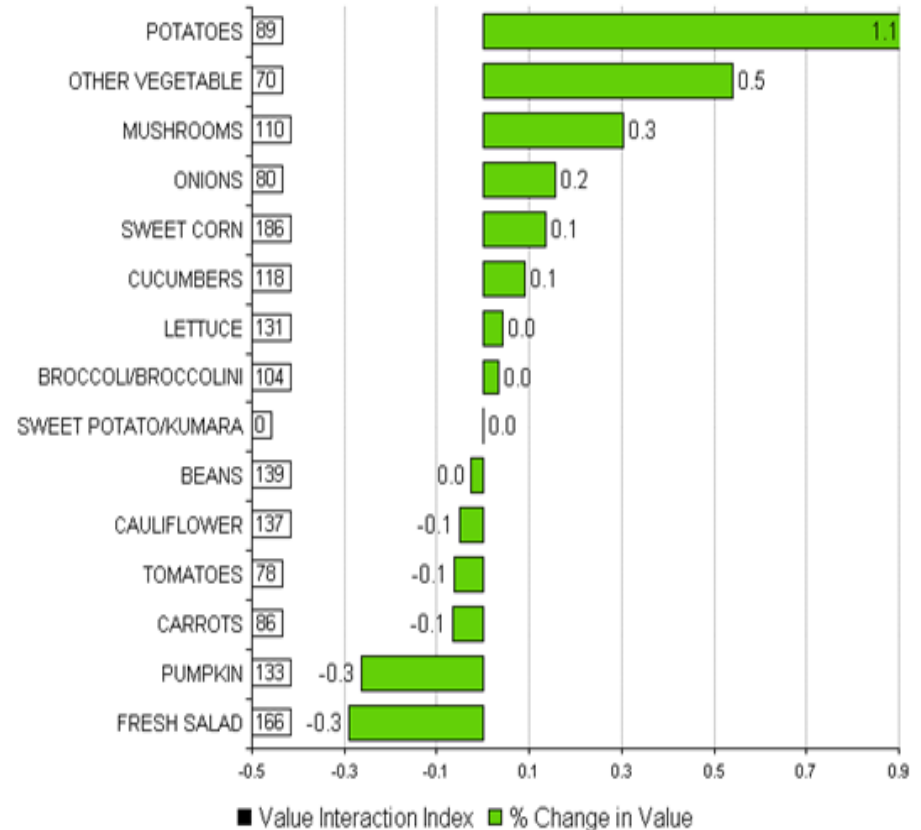


5 Quick Tips: Eating More Vegetables and Fruit

- 1. Keep fruit out where you can see it.** That way you'll be more likely to eat it. Keep it out on the counter or in the front of the fridge.
- 2. Get some every meal, every day.** Try filling half your plate with vegetables at each meal. Serving up salads, stir fry, or other vegetable-rich fare makes it easier to reach this goal. Bonus points if you can get some fruits and vegetables at snack time, too.
- 3. Explore the produce aisle and choose something new.** Variety is the key to a healthy diet. Get out of a rut and try some new fruits and vegetables.
- 4. Bag the potatoes.** Choose other vegetables that are packed with more nutrients and more slowly digested carbs. Read the "Carbohydrates" section of The Nutrition Source to [learn how to add good carbs to your diet](#). Or try one of these [delicious whole grains recipes](#) as an alternative to potatoes.
- 5. Make it a meal.** Try some new [healthy recipes](#) where vegetables take center stage, such as Mollie Katzen's [asparagus with warm tarragon-pecan vinaigrette](#), or Nina Simonds' [spicy broccolini with red pepper](#).

Source: Harvard School of Public Health, 2013

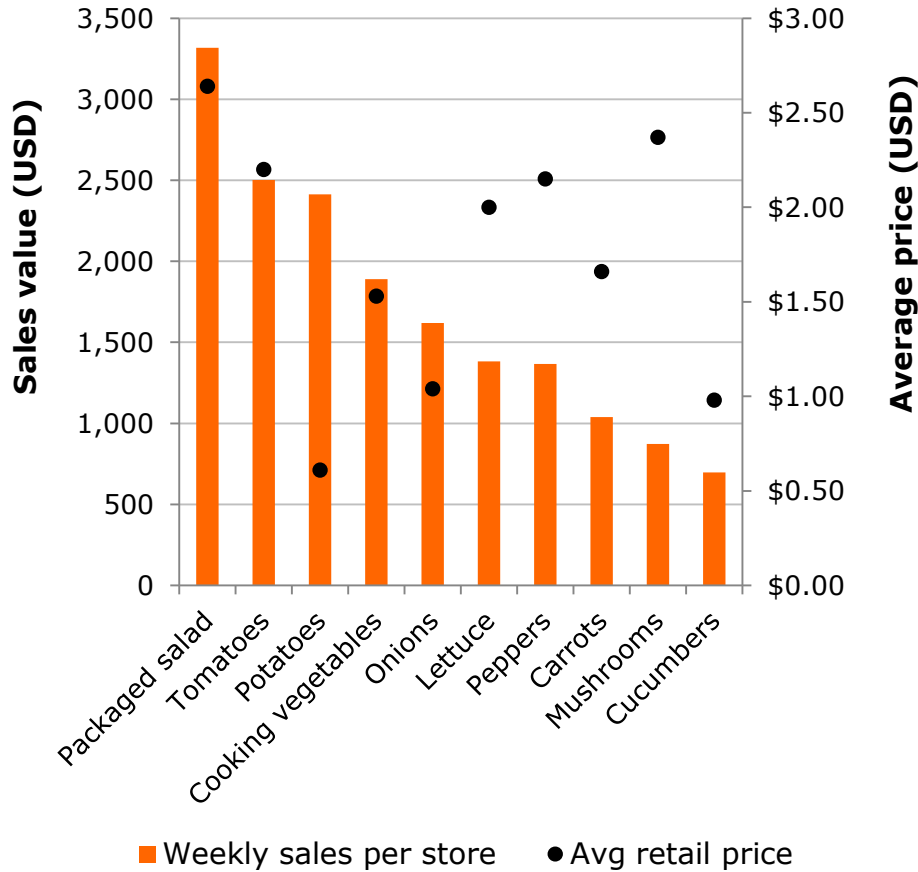
Consumer switching to/from Kumara



Source: AUSVEG & Nielsen, 2013

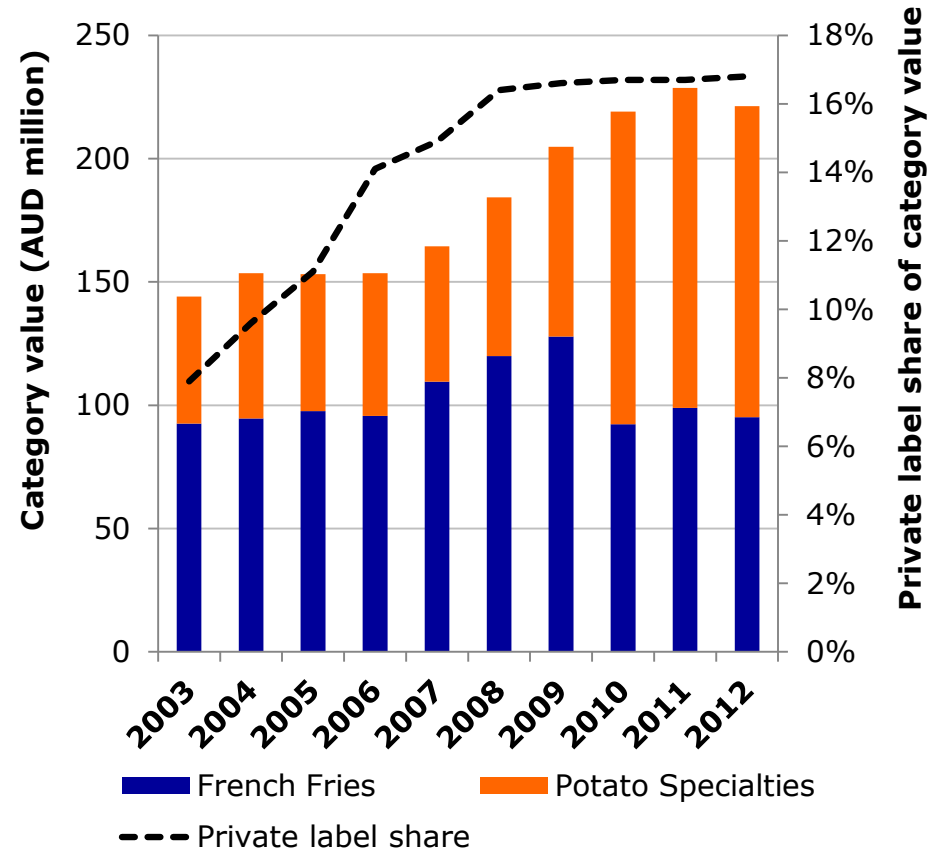
Who's your competition?

Top 10 vegies sold in U.S. grocery, Q1-2013



Source: United Fresh, Nielsen & Rabobank, 2013

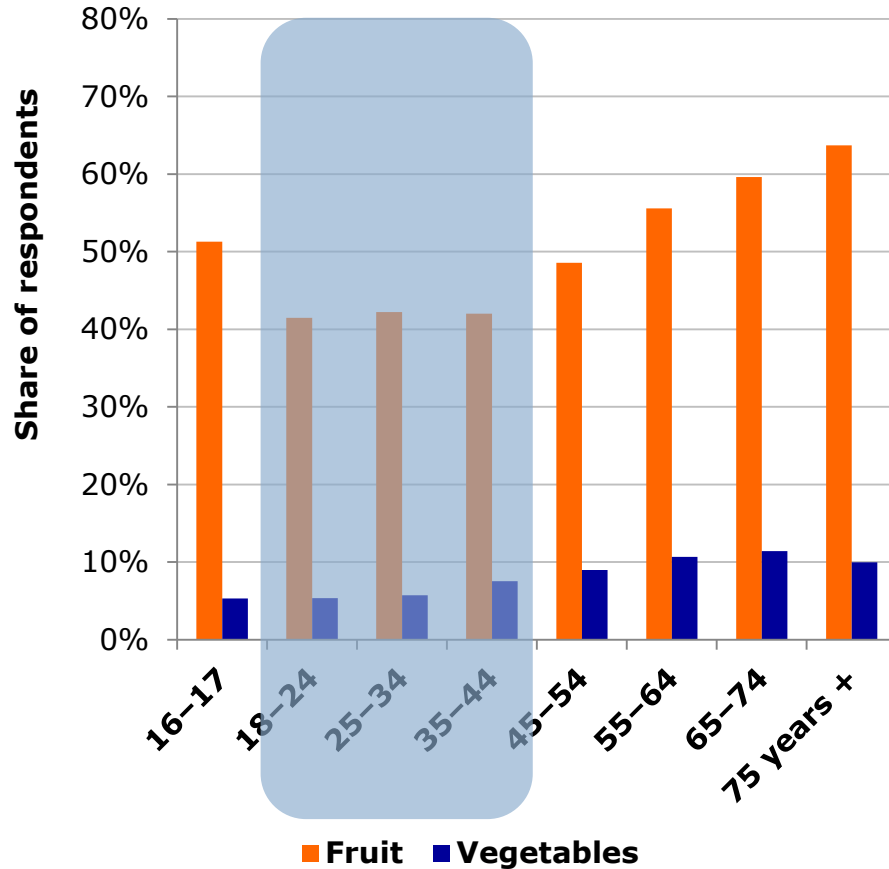
Sales of frozen potatoes in AUS grocery



Source: Retail World & Rabobank, 2013

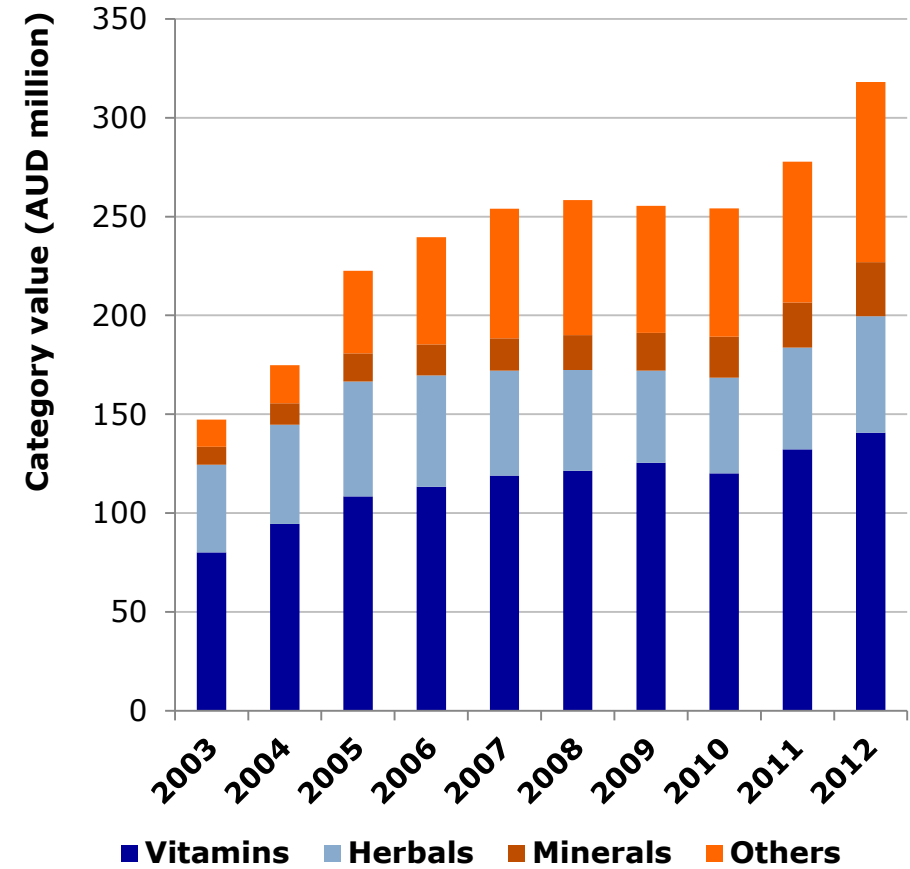
The task at hand

Aussies with an 'adequate' daily fruit & veg intake



Source: ABS & Rabobank, 2013

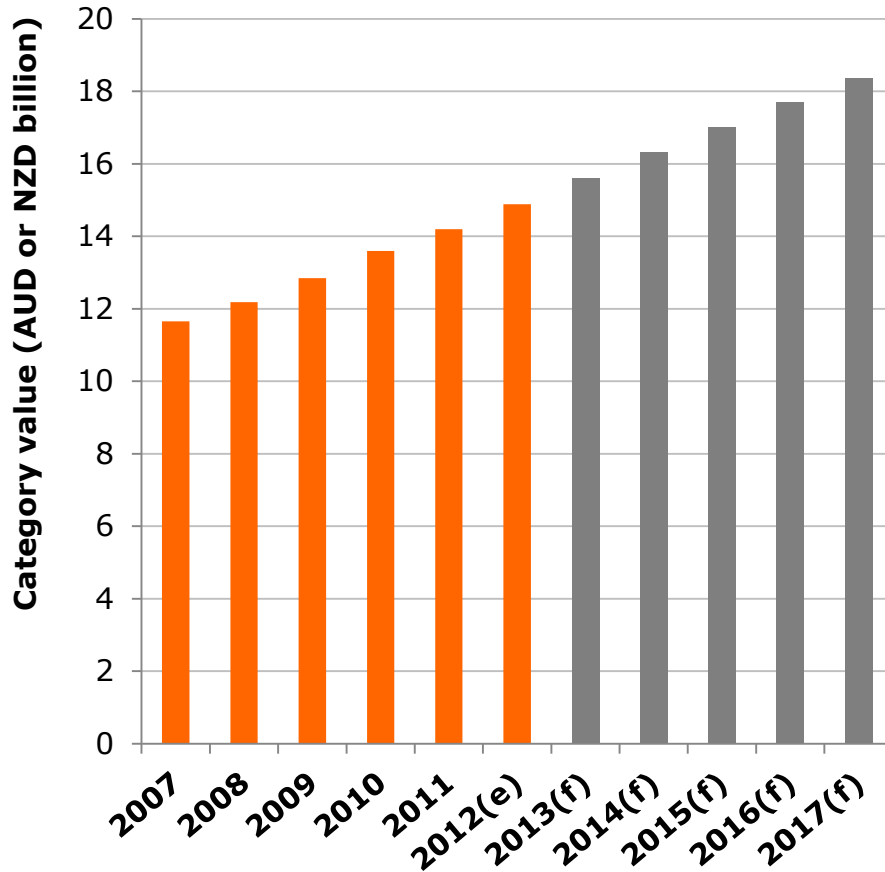
Sales of dietary supplements in AUS grocery



Source: Retail World & Rabobank, 2013

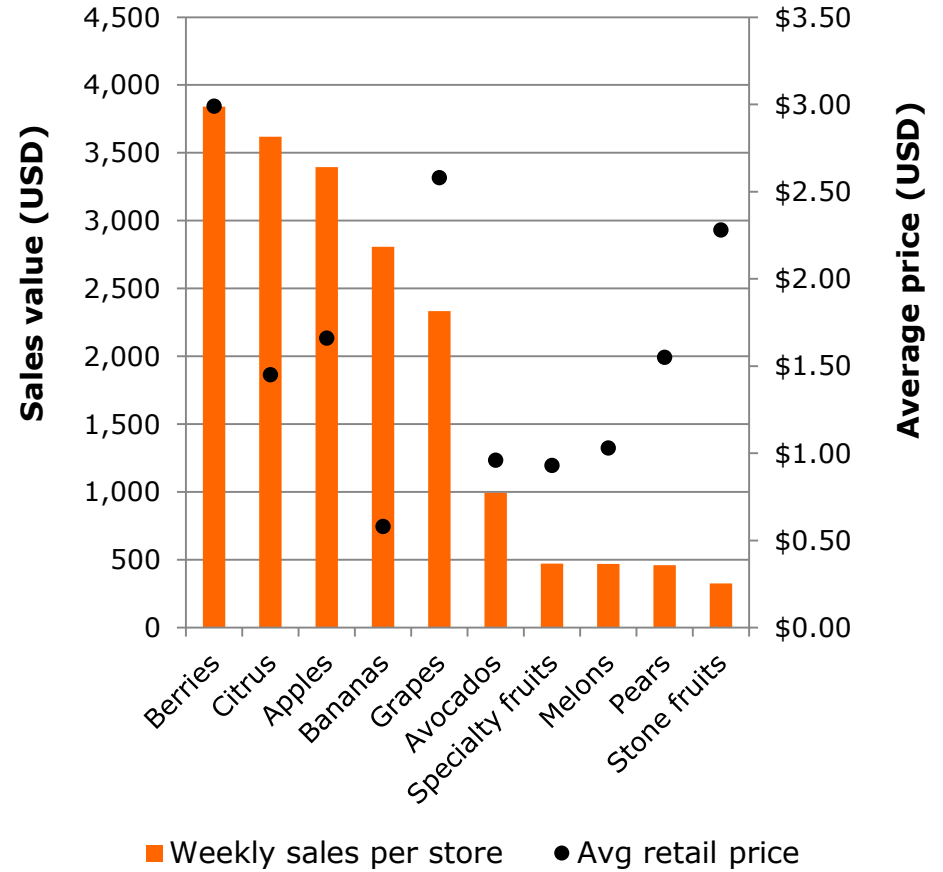
The task at hand

Health & wellness packaged f&b sales in AUS



Source: Euromonitor & Rabobank, 2013

Top 10 fruits sold in U.S. grocery, Q1-2013



Source: United Fresh, Nielsen & Rabobank, 2013

The new frontline in the grocery retail battle

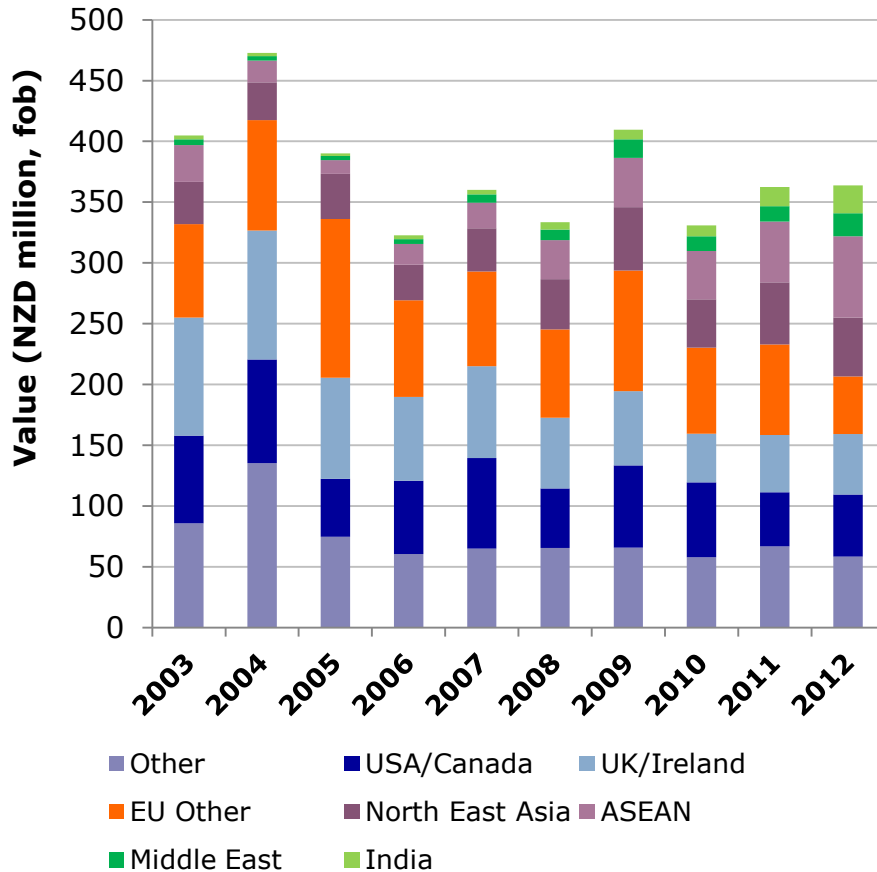
Contribution of fresh fruit & veg. to grocery businesses

Question	IMPACT to STORE	NET FAVORABLE RESPONSE (% who 'agree' minus % who 'disagree')		
		Average all categories	Everyday Fruit	Staple Vegetables
Main reason I go shopping	Drive Traffic	-33%	28%	27%
Don't want to run out	Drive Traffic	15%	55%	54%
Try new and different	Increase Spend	9%	31%	27%
More likely to go back	Increase Loyalty	7%	22%	20%

Source: Coles Group based on Advantage Group research, 2013

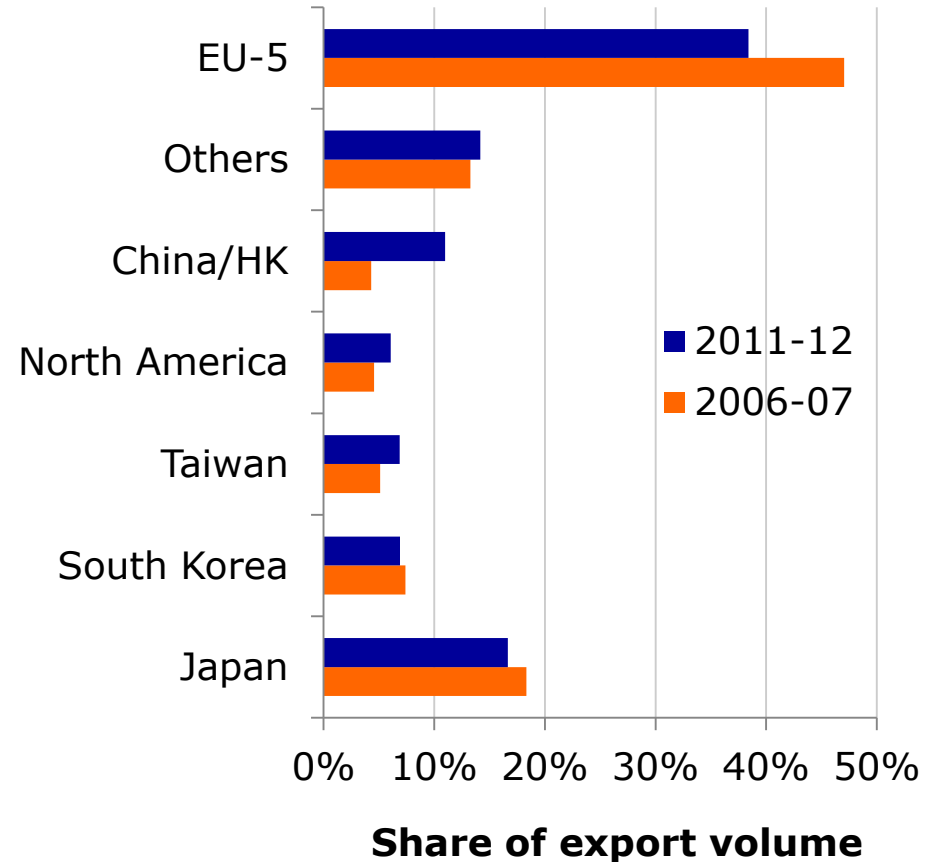
Unlocking consumer demand abroad

New Zealand apple exports by region/country



Source: Statistics NZ & Rabobank, 2013

New Zealand kiwifruit exports by region/country



Source: Zespri Group & Rabobank, 2013

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About the Rabobank Group



With over 110 years of banking experience, Rabobank is the world's leading specialist in food and agribusiness banking. Founded in the Netherlands in 1898, by farmers for farmers, Rabobank retains its cooperative structure and founding principles while operating in 47 countries around the world.

Rabobank is among the 30 largest financial institutions in the world, based on Tier 1 Capital with a continuing and growing presence in Australia and New Zealand.

Rabobank Australia and Rabobank New Zealand are part of the international Rabobank Group. Rabobank Australia Limited is a leading rural lender in Australia and takes pride reinvesting back into the local agricultural community. Rabobank understands the cyclical nature of agribusiness and takes a long-term view of the industry, using its established network of 61 strategically located branches across the nation to service rural clients.

As well as global knowledge and local market expertise, Rabobank rural managers have a genuine understanding of their clients' businesses. This unique approach provides a real value-adding resource to help clients achieve their short and long-term business goals.

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