

INDIA



Strategic Narrative

Terroir: Relationship to place, that is, taste sensation of native flora; unique flora from forests of SWA; harvested using traditional methods

Australia: Australia as geographic location

South-Western Australia : geographic location, could be seen as isolated and natural

➤ **Premium buyers are more likely to have visited Australia**

Buyers preferred attributes when purchasing:

- ✚ Health - bioactive honey
- ✚ Certification - examples include BQUAL; testing; government certification
- ✚ Raw - unprocessed

Most premium buyers are >55 years and university educated (85%).

The majority (65%) use honey daily and purchase 250-500g between 1-3 months.

Note 37% indicate they use honey topically creating a demand for bioactive honey. India had the lowest price for honey from all markets surveyed.

JAPAN



Strategic Narrative

Terroir: Honey produced in Western Australia is more likely to achieve higher prices

Bee husbandry: Honey produced with sustainable production methods for healthy bees

Australia: Honey produced in Australia

- **Premium honey buyers are more likely to visit Australia or Western Australia – strong geographic focus and connection to the country.**

Buyers preferred attributes when purchasing:

- ✚ Health - messaging
- ✚ Certification - for example BQUAL, testing, government certifications
- ✚ Monofloral honey - could be a proxy for pure, natural, known origin

Most premium buyers are older (>55 years). Purchase 250-500g monthly and consume weekly. They are most likely to use honey with food and cooking.

MALAYSIA



Strategic Narrative

Bee husbandry: Honey produced with sustainable production methods for healthy bees

South Western Australia: geographical location, could be seen as isolated and natural

Australia: Australia as geographic location

- **Premium buyers are more likely to have visited Western Australia**

Buyers preferred attributes when purchasing:

- ✚ Health - bioactive honey
- ✚ Certification - examples BQual, testing, government certifications
- ✚ Raw - unprocessed

Most premium buyers are 25-54 single family with 70% having a university degree. Purchase 250-500g and approx. 80 % use weekly/ daily and purchasing every 1-3 months.

Note: 80% use honey in tea/ water drinks and 18% use honey topically. Topical users of honey would be looking to high bioactivity at a reasonable price.

SAUDI ARABIA (MIDDLE EAST)



Strategic Narrative

Health: highly bioactive honey

Terroir: relationship to place, that is, taste sensation of native flora, unique flora from the forests; harvested using traditional and ethical methods

Australia: geographic location

- Premium honey buyers are more likely to visit Australia – strong geographic focus and connection to country

Buyers preferred attributes when purchasing:

- ✚ Health - bioactivity
- ✚ Glass Jar
- ✚ Monofloral honey - could be a proxy for pure, natural, known origin

Most premium buyers are 25-44 in a single family situation, purchase 20-500g every 2-3 weeks and consume daily (>50%).

Note: 44% give honey as a gift giving opportunities for different packaging.

UNITED KINGDOM



Strategic Narrative:

Terroir: relationship to place i.e. taste sensation of native flora; unique flora from the forests of SWA; harvested using traditional and ethical methods

Flavour: emphasise the diversity of flavour from our range of honeys (see link to gift?)

South Western Australia: geographical location – could be seen as isolated and natural

- Premium buyers have no need to visit Australia

Buyers preferred attributes when purchasing:

- ✚ Raw - Direct from hives
- ✚ Certification
- ✚ Glass jar

Most premium buyers are 18-34 in a family situation, purchase 250-500 g every 1-3 months and consumer weekly. 16% indicated they have given honey as a gift. Likely to use honey with food; tea and cooking.

Note 22% use daily – this may be those who use it in tea.

UNITED STATES (CALIFORNIA)



Strategic Narrative

Terroir: relationship to place i.e. taste sensation of native flora; unique flora from the forests of SWA; harvested using traditional and ethical methods

South Western Australia: geographical location – could be seen as isolated and natural

Health: highly bioactive honey

- **Premium honey buyers are more likely to visit Australia- strong geographic focus and connection to the country.**

Buyers preferred attributes when purchasing:

- ✚ Raw - (unprocessed)
- ✚ Raw - Direct from the hives – again linked to unprocessed
- ✚ Health – bioactivity

Most premium buyers are 25-34 in a family situation, purchase 250-500g every 1-3 months and consume weekly.

Likely to use honey with food; tea; and cooking.

Note 22% of premium buyers consume daily – this may be those who use it in tea.