



Horticulture Australia and AUSVEG.

VG12078 Project Harvest.



Monthly Tracker Report Wave 11: April 2014. Cabbage, Celery, Cucumber & Zucchini

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Background & Methodology.

➤ Background & Setting the Scene.

There is an increasing need in Australia's Horticulture Industry to monitor and gauge consumer perception and behaviour in relation to fresh vegetables.

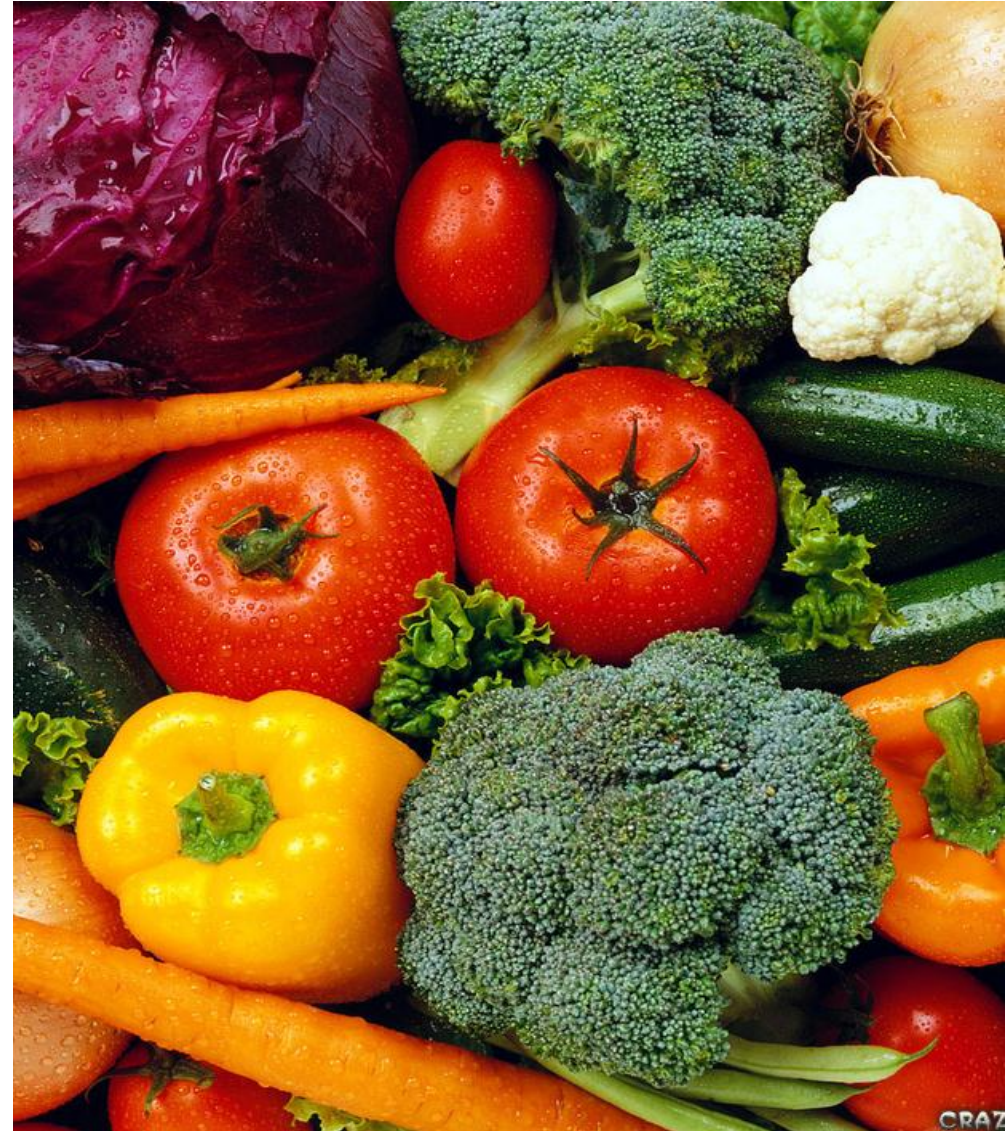
Colmar Brunton has been commissioned to conduct a monthly on-line tracking project following specified vegetables across a three year period; monthly trend analysis; and additional ad-hoc projects to assist in this understanding of consumers.

The following report is designed to supplement an online Interactive Research Tool (IRT) and details the findings of the monthly on-line tracking program and trends analysis components.

This wave's report (Wave 11, April 2014) focuses on:

- Cabbage
- Celery
- Cucumber
- Zucchini

Essentially this is the third wave of tracking for these specific commodities, and as such, the current report will bring to light any change over the past eight months.





Online Methodology.

- Respondents were recruited via an Online Panel. If the respondents met the recruitment requirements of sufficient vegetable consumption (monthly) they were asked to complete the online questionnaire.
- All respondents completed general demographic and consumption questions. If respondents purchased any of the specific commodities within the last month they would complete those questions. A minimum of N=300 respondents per commodity completed the questionnaire.
- Topics covered in the questionnaire were vegetable purchase and consumption, category health, price and value perceptions, triggers and barriers to purchase and preparation and cooking preferences.
- An additional 2 ad-hoc questions are asked at the end of the questionnaire. The subjects of these questions are supplied by Horticulture Australia prior to each month to get feedback on topics of interest at that time.
- The questionnaire took 15 minutes to complete.
- Questions asked appear on the bottom of each page of this report. Unless stated otherwise, all scales were 0 -10 scales, with higher scores indicating greater agreement/liking/importance etc.

General Respondent Questions

Demographics

Vegetable Consumption

Commodity
1

Commodity
2

Commodity
3

Commodity
4

Commodity Specific Questions

Category Health

Purchase & Consumption Habits

Price Perceptions & Average Spend

Triggers/Barriers to Purchase

Preparation Preferences

+ 2 Ad hoc Questions per Month



Sample.

In total, 463 respondents completed the questionnaire. Respondents represented most States and Territories, as well as both metro and rural areas.

Demographic information about age and household structure was also collected to examine differences between life stages.

To qualify for the questionnaire, respondents...

- ⇒ Were aged 18 years and over
- ⇒ Purchased fresh vegetables at least once a month
- ⇒ Purchased at least one of the monthly commodities (Cabbage, Celery, Cucumber & Zucchini) within the last month
- ⇒ Were the main or joint grocery buyer

	Total N=463	Cabbage n=304	Celery n=304	Cucumber n=301	Zucchini n=302
Gender					
Male	22%	22%	22%	23%	20%
Female	78%	78%	78%	77%	80%
Age					
18-24 y.o.	6%	6%	8%	8%	5%
25-34 y.o.	19%	18%	20%	20%	18%
35-44 y.o.	16%	14%	16%	15%	14%
45-54 y.o.	22%	23%	19%	21%	23%
55-64 y.o.	18%	18%	16%	17%	20%
65+ y.o.	19%	21%	20%	19%	20%
Household					
Single Income no Kids	15%	15%	16%	16%	15%
Double Income no kids	18%	17%	18%	18%	18%
Young Families	17%	16%	18%	19%	17%
Established Families	25%	24%	23%	24%	24%
Empty Nesters	24%	27%	25%	23%	25%
Location					
New South Wales	19%	16%	19%	20%	20%
Victoria	17%	17%	17%	17%	17%
South Australia	18%	20%	19%	16%	17%
Queensland	19%	18%	17%	19%	20%
Western Australia	17%	17%	16%	17%	16%
Tasmania	6%	8%	8%	6%	7%
Australian Capital Territory	3%	4%	3%	4%	3%



Trends Research: Our Approach

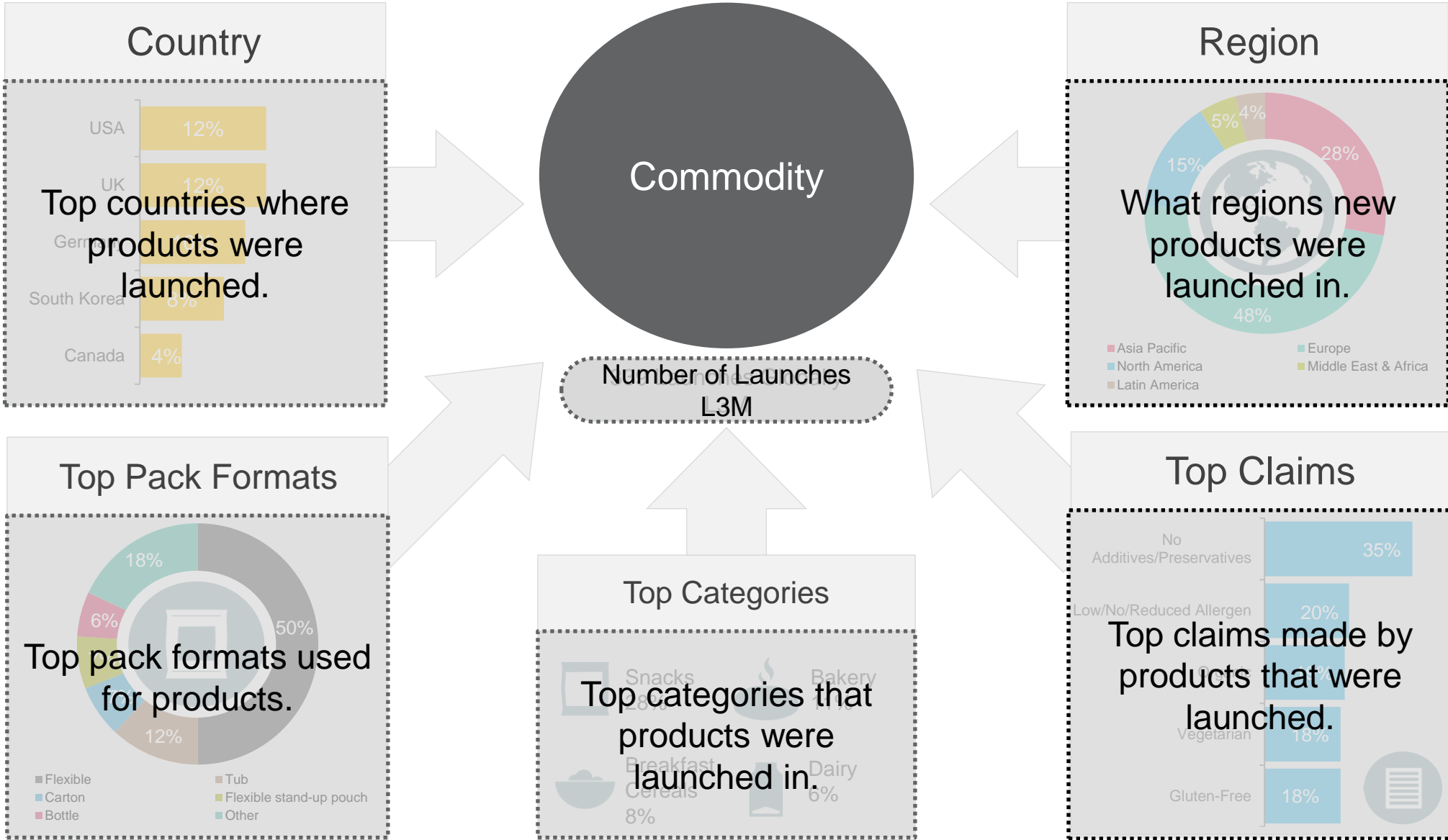


- ▶ Colmar Brunton has used a combination of both desk research and in the field of market research to explore the trends of each vegetable commodity being tracked this month.
- ▶ Our main source of secondary data for this report was collected from Mintel Global New Products Database (GNPD).
- ▶ This data source is used to analyse products launched around the globe in the last 3 months (L3M) that contained each vegetable being tracked as a core ingredient.
- ▶ Trends are determined at a global and regional level.
- ▶ Claims and pack types used for the launched products are explored and the relevant product categories are determined. Specific examples of products being launched around the globe that are particularly innovative are displayed for reference.
- ▶ Trend reports are provided monthly and will reflect the 4 commodities tracked in the preceding period.

Product Launches Last 3 Months (L3M)

How to Read Summaries

See below for the format that will be used to summarise the trend data collected for each commodity.





Wave 11: Executive Summary



Cabbage Grower Action Plan

50%

Key trigger to purchase was ease of preparation.

1.

Insight:

While multiple formats are available, especially at Coles, (whole, half and mini) storage is still a barrier to purchase.

Recommendation:

Promote more consistent stocking of multiple formats across all supermarkets.

Consider innovation around shape of cabbage (i.e. square) and how it is portioned when wrapped.

2.

Insight:

Decreased importance of provenance across waves.

Recommendation:

Continually promote the origin of cabbages produced by the region they are cultivated.

3.

Insight:

Cabbage is often cooked in Chinese cuisine.

Recommendation:

Further promote the ease of using cabbage when cooking by pairing the product with other easily cooked vegetables for bundle offerings (e.g. an Asian themed fresh steamed vegetable pack).



Celery Grower Action Plan



Consumer sentiment (category health measures) were low comparative to other vegetables tracked.

1.

Insight:

Celery had a relatively long shelf life once purchased.

Recommendation:

Promote celery as the “go to” fresh snack to encourage frequency of consumption.

Communicate simple recipes partnering celery with spreads (contrasting textures which appeal).

2.

Insight:

Consumers are either buying celery whole or not buying it at all because it's too large.

Recommendation:

Offer alternative formats like celery hearts and pre-packaged sticks and promote as easy to store, easy to use, keep fresh, less wasteful alternative.

3.

Insight:

People don't have much imagination when it comes to celery.

Recommendation:

Promote the textural and appearance benefits celery adds to recipes and the versatility it inherently possesses because of its subtle flavour.



Cucumber Grower Action Plan

53%

The main trigger to future purchase was taste.

1.

Insight:

Most people eat cucumber raw; they don't cook with it.

Recommendation:

Promote cooking styles and techniques for cucumber to be include in cooked dishes.

This should increase consumers' cooking repertoire and drive consumption occasions.

2.

Insight:

20% of global product developments were in the meals and meal centre category, yet there were none of these innovations in Australia.

Recommendation:

There is potential to grow cucumber product market with development in meals category.

3.

Insight:

Snacks were a common meal type for the use of cucumber as an ingredient.

Recommendation:

Promote cucumber's versatility as a snacking ingredient by offering new ideas/recipes/bundled vegetable offerings to use them for snacking occasions.



Zucchini Grower Action Plan

61%

Consumers purchase zucchini as an ingredient in their dishes.

1.

Insight:

The majority of consumption occasions are weekday dinners.

Recommendation:

Introduce snack options that incorporate zucchini.
Promote alternative consumption occasions, that are not just limited to dinner settings.

2.

Insight:

Zucchini were served with a variety of vegetables over the past three waves, yet primarily cooked in Australian cuisine.

Recommendation:

Promote versatility of zucchini as the 'perfect partner' to other vegetables. Highlight alternate cuisines to increase cooking and consumption frequency.

3.

Insight:

Expectations of zucchini freshness decreased across waves.

Recommendation:

Investigate whether variability in freshness is due to seasonality or supply chain issue to prevent alienation of consumers.

Wave 11: Fact Base

(1 of 2)



Cabbage:

- Consumer satisfaction of cabbage was on trend with all commodities tracked thus far. However, consumer endorsement was relatively low.
- On average, cabbage was purchased 2.6 times per month and consumed 6.3 times per month. Cabbage was typically purchased from Coles and Woolworths.
- Cabbage was perceived to be good value for money (6.3/10), however this was directionally lower than previous waves. Recalled last spend was \$2.70.
- Retail and price analysis revealed differing formats across retailers. Coles was more likely to stock mini formats which retailed between \$2.50 - \$2.98 each. Whilst Woolworths stocked whole, regular size cabbage, which retailed for \$3.98 - \$4.98 each.
- Over a third of respondents could not recall any type of cabbage, consistent with previous waves. Those that could had good levels of awareness for multiple varieties.
- Cabbage was expected to stay fresh for over 10 days. Expectations of freshness were usually met most of the time.
- Top triggers for purchase was to purchase cabbage as an ingredient. Key barrier to purchase was cabbage being hard to store and keep.



Celery:

- Celery received low scores for endorsement, satisfaction, interest and importance, however there was strong future purchase intent.
- Celery was purchased on average 2.5 times per month and consumed 7.7 times per month, which was lower than previous waves.
- Consumers preferred to purchase whole celery bunches. Recalled last spend was \$2.50. Overall, perceived value for money was relatively good (6.2/10).
- Price tracking was the lowest it has been across the months tracked, with average national price in April \$2.40.
- Spontaneous awareness of celery types remained very low, with 88% of respondents unable to state a type.
- Consumers expected celery to remain fresh for over 9 days, which was on trend with previous waves.
- Top triggers to purchase were using celery as an accompanying vegetable to dishes, for health benefits and to add variety. Key barrier to purchase was that it was too large.

Wave 11: Fact Base

(2 of 2)



Cucumber:

- ▶ Cucumber had consistent levels of perceived importance, satisfaction and interest in new varieties. However, endorsement was very low with consumers less likely to recommend.
- ▶ Cucumber was purchased 4.3 times per month and consumed on average 12.6 times per month. Main retail channels for purchase was Coles and Woolworths.
- ▶ Average weight of purchase was 600g, which was consistent with previous waves. Recalled last spend was \$2.50 and overall perceived value for money was good (6.2/10).
- ▶ Pricing tracking of Lebanese cucumber revealed a national average of \$4.96, which was in line with December price tracking.
- ▶ Unprompted awareness of types and varieties was high, with Lebanese and Continental cucumbers being the most recalled. A quarter of consumers were unable to recall a type of cucumber.
- ▶ Cucumber was expected to stay fresh for just over a week and expectations were typically met.
- ▶ Top drivers of purchase were taste and health benefits, consistent across waves.



Zucchini:

- ▶ Zucchini received relatively poor levels of importance and interest in new varieties by consumers.
- ▶ On average zucchini was purchased 3.2 times per month and consumed 6.4 times per month, which was on trend with previous waves.
- ▶ On average, consumers purchased 700g of zucchini. Recalled last spend was \$2.80. Overall zucchini was perceived to be good value for money (6.2/10).
- ▶ Price tracking indicated a national average of \$4.71, which was on trend with December 2013 prices.
- ▶ Awareness of zucchini types remained low, with 74% of consumers unable to state a zucchini type. Consumers recalled types primarily through colour.
- ▶ Zucchini was expected to stay fresh for 8 days. Expectations of freshness were met at least most of the time.
- ▶ Top triggers to purchase were as an ingredient in a meal and convenience factors of both preparation and cooking.



Wave 11: Ad-Hoc Questions

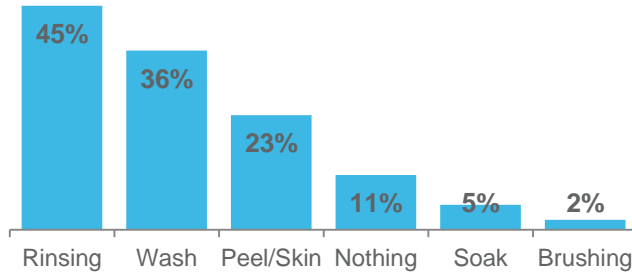


Vegetable Preparation

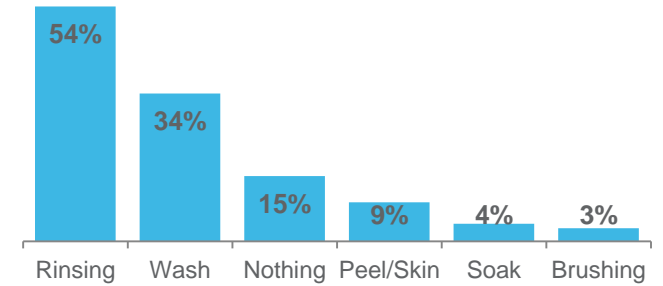
➤ *Rinsing the most common preparation technique*



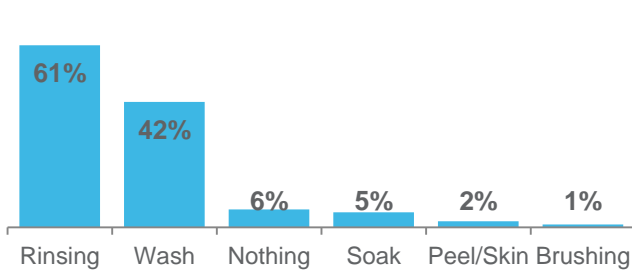
Brussels Sprouts



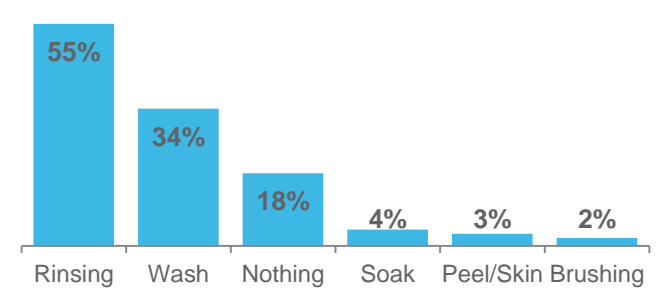
Cabbage



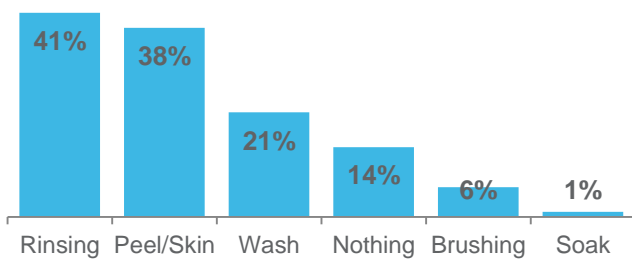
Lettuce



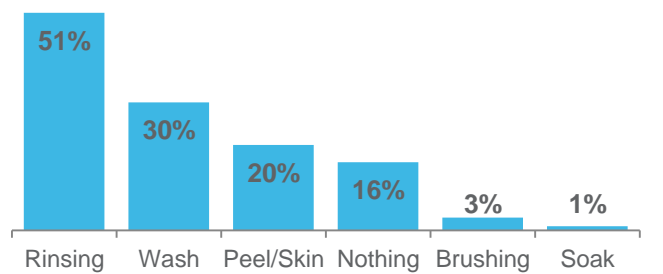
Cauliflower



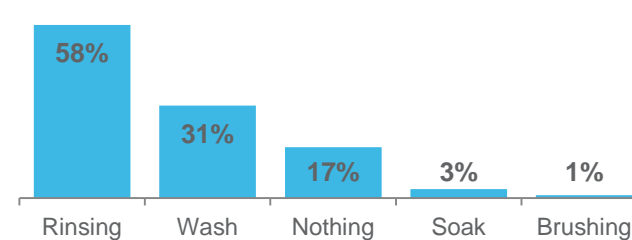
Sweet Corn



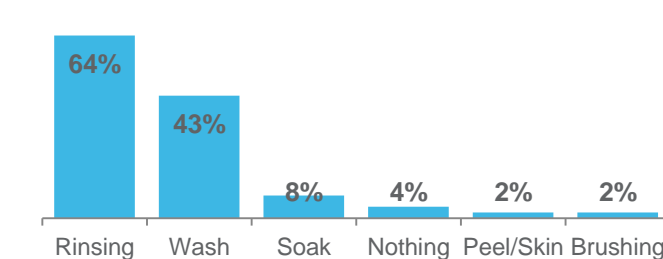
Cucumber



Baby Spinach



Asian Vegetables



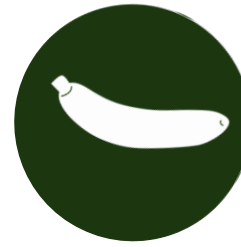
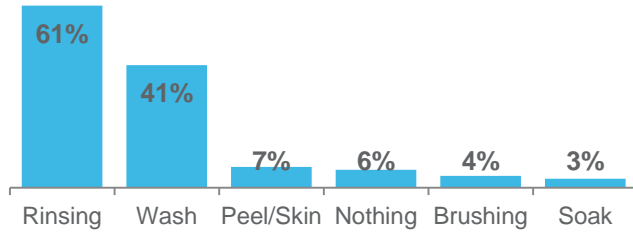


Vegetable Preparation

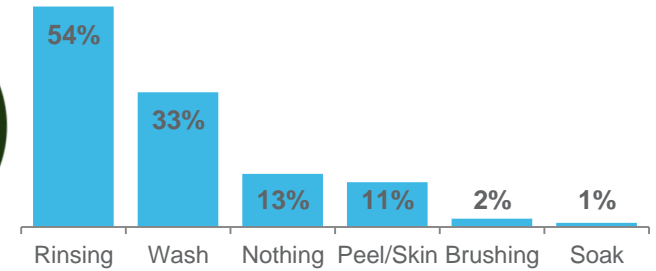
➤ *Green Peas least preparation of all commodities*



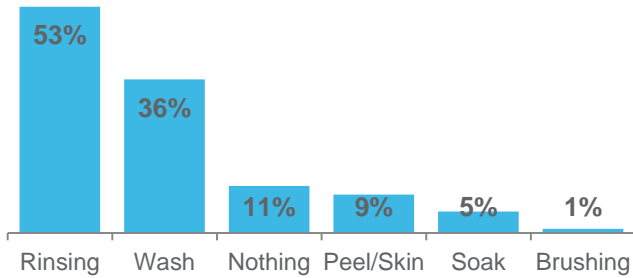
Celery



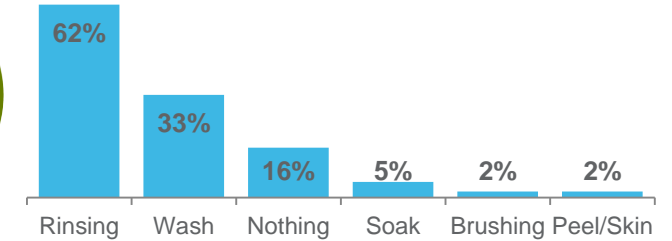
Zucchini



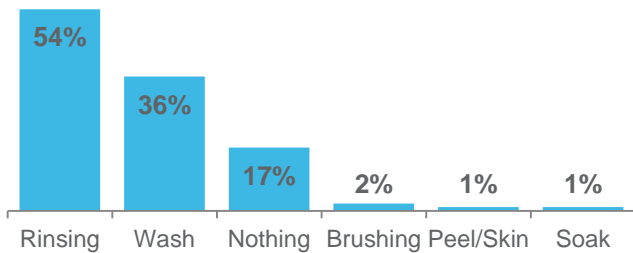
Green Beans



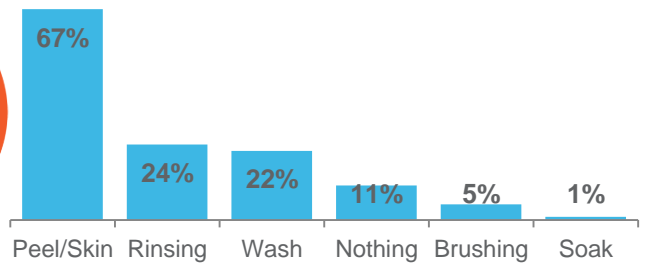
Broccoli



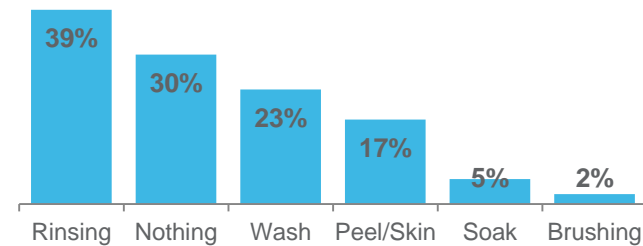
Capsicum



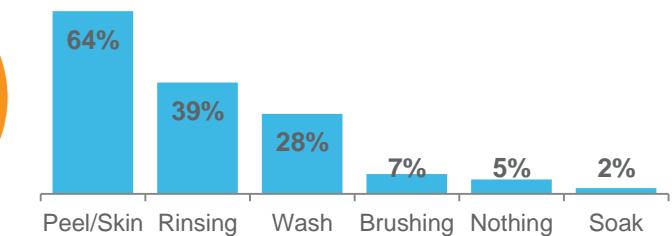
Pumpkin



Green Peas

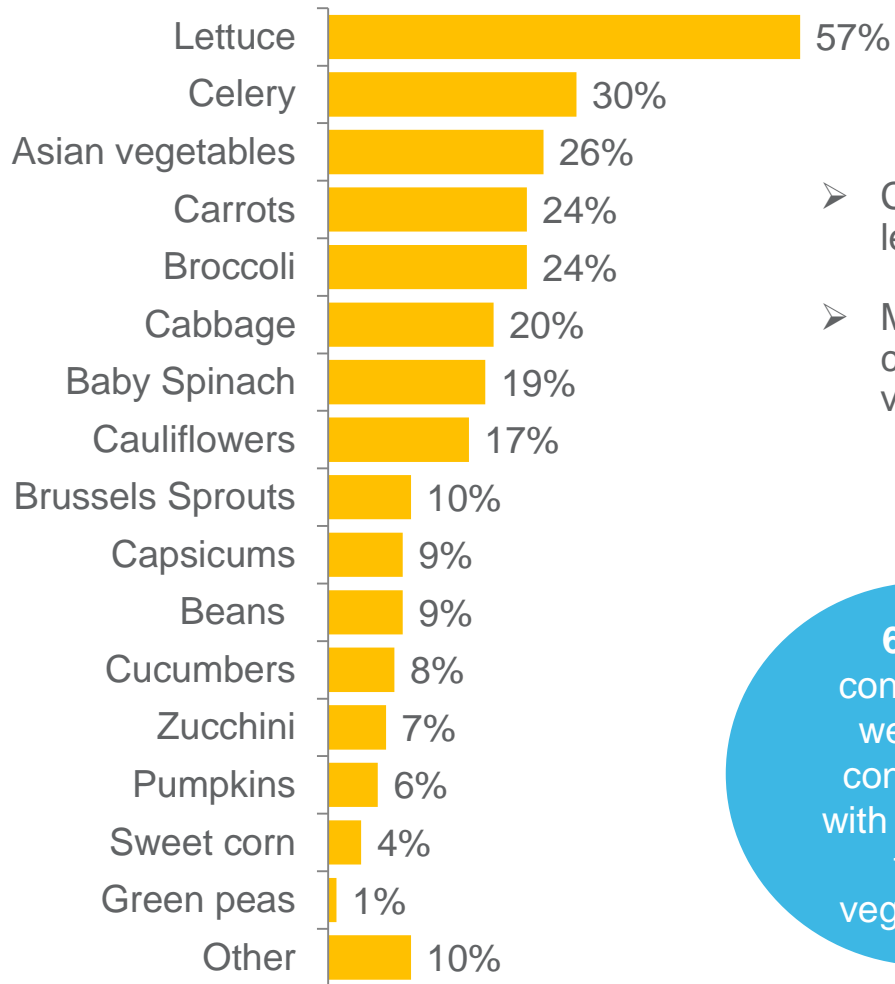


Carrot





Vegetable Hygiene



- Consumers were most concerned about cleaning lettuce, celery and Asian vegetables before use.
- Most of the vegetables that consumers were concerned about were either low growing or root vegetables.

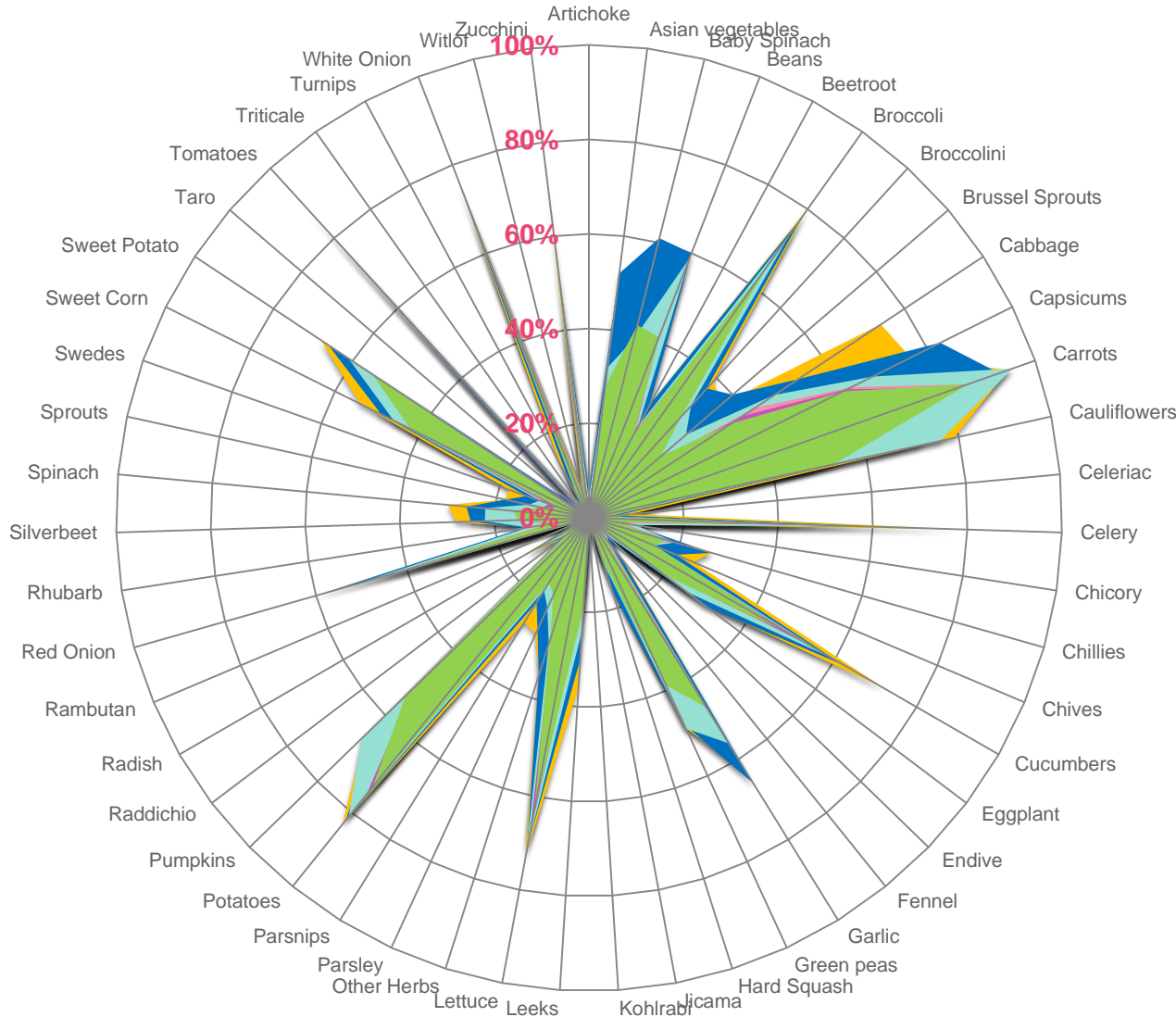
6% of consumers were not concerned with cleaning their vegetables



Wave 11: Overall Vegetable Tracking



Vegetables Purchased Last Month



- There was a decrease in vegetable purchase in April, compared with previous waves, however this was on trend with March.
- The most purchased vegetables in the current wave were tomatoes, carrots and potatoes.

- Wave 1: June
- Wave 2: July
- Wave 3: August 2013
- Wave 4: September 2013
- Wave 5: October 2013
- Wave 6: November 2016
- Wave 7: December 2013
- Wave 8: January 2014
- Wave 9: February 2014
- Wave 10: March 2014
- Wave 11: April 2014



Category Health Explained

The following questions were asked to understand consumer sentiment about the vegetables, which can be tracked over time.

The Harvest Mean is the average of all commodities tracked thus far.

- ➔ How **important** to you is having a range of *commodity* available in the store where you usually shop?
- ➔ How **satisfied** or dissatisfied are you with the range of *commodity* currently available?
- ➔ How likely would you be to **recommend** *commodity* to your family and friends?
- ➔ How interested or disinterested are you in new *commodity varieties*?
- ➔ In the future, are you **likely to buy**?



Category Health

- Overall, category health was low. This was particularly evident in future purchase intent, with a small minority of consumers' indicating that they would increase their purchase of that commodity. However, there was strong purchase intent to buy the same amount as current purchases.
- Celery had very low importance to consumers and interest in new varieties, which was consistent with previous waves. This indicated that consumers still view Celery as a 'pantry stocker' rather than a key ingredient.
- Consumer satisfaction was on trend across all commodities and comparable to the Harvest mean.

	Cabbage	Celery	Cucumber	Zucchini	Harvest Total Mean
Importance	6.2	5.1	6.1	5.6	6.3
Satisfaction	6.6	6.5	6.5	6.5	6.6
Endorsement	6.2	5.9	6.3	6.3	6.7
Interest (New Types)	5.9	5.0	5.9	5.5	6.1
Future Purchase					
More	7%	3%	6%	7%	14%
Same	92%	95%	91%	92%	85%
Less	1%	2%	3%	1%	2%

Harvest Total Mean is the mean of all commodities from Wave 1, up to and including current wave.



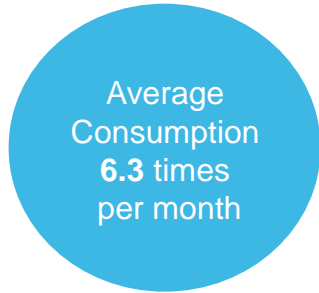
Cabbage.



Purchase and Consumption Behaviour

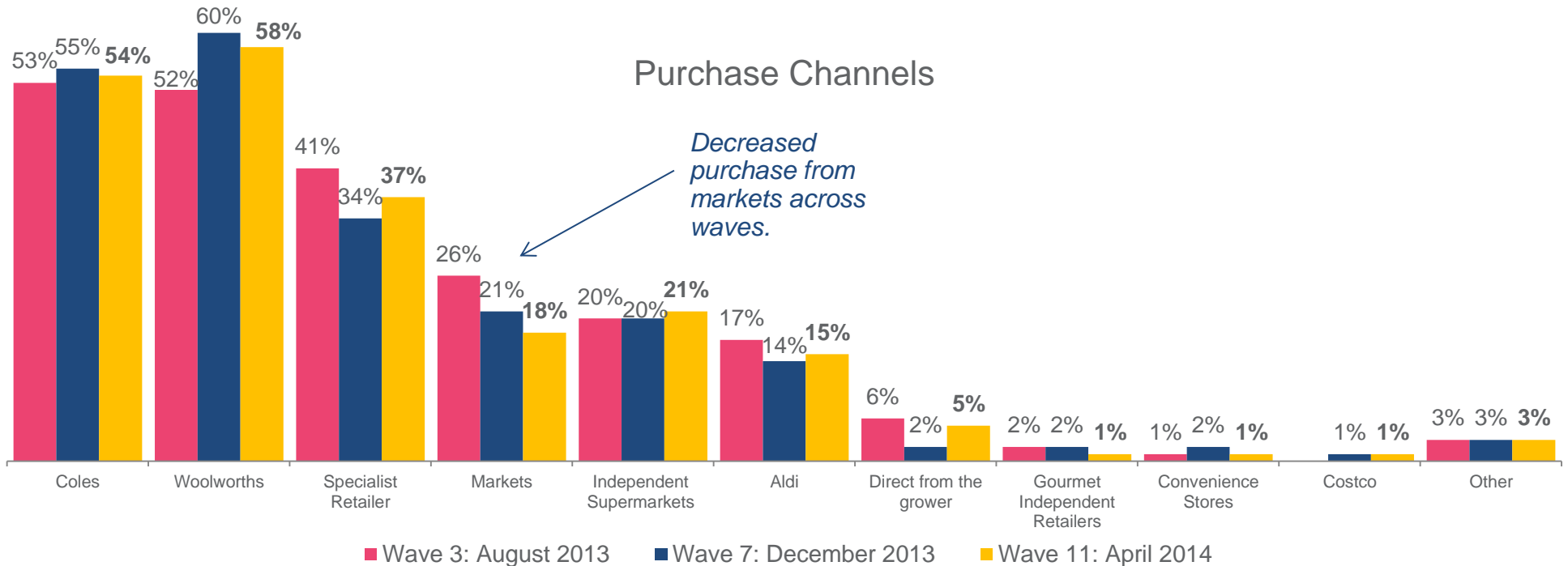


- ▲ 3.1 times, Wave 3
- ▲ 3.1 times, Wave 7



- ▲ 7.6 times, Wave 3
- ▲ 6.8 times, Wave 7

- ⇒ Consumption and purchase frequency were down from previous waves. On average, consumers purchased cabbage twice a month, with six consumption occasions.
- ⇒ Coles and Woolworths were the main channels for purchase. Consumers were also likely to purchase from specialist retailers.



Q1. On average, how often do you purchase <commodity>?
 Q2. On average, how often do you consume <commodity>?
 Q5. From which of the following channels do you typically purchase <commodity>?
 Sample Wave 3, N=502, Wave 7, N=317 and Wave 11 N=304



Average Spend and Price Sensitivity



Average weight of purchase

The average consumer typically purchased 1kg of Cabbage in April 2014, this was consistent with previous months.

- 1kg, Wave 3
- 1kg, Wave 7



Recalled last spend

The average recalled last spend was \$2.70 in April, on trend with previous waves.

- ▲ \$2.80, Wave 3
- ▲ \$3.00, Wave 7



Value for money

On average, consumers perceived Cabbage to be good value for money (6.3/10), however directionally lower scores across waves.

- ▲ 6.6/10, Wave 3
- ▲ 6.5/10, Wave 7

Sample Wave 3, N=502, Wave 7, N=317 and Wave 11 N=304

Q3. How much <commodity> do you typically purchase when you shop for it?

Q3b. To the best of your memory how much did this cost on your most recent typically purchase?

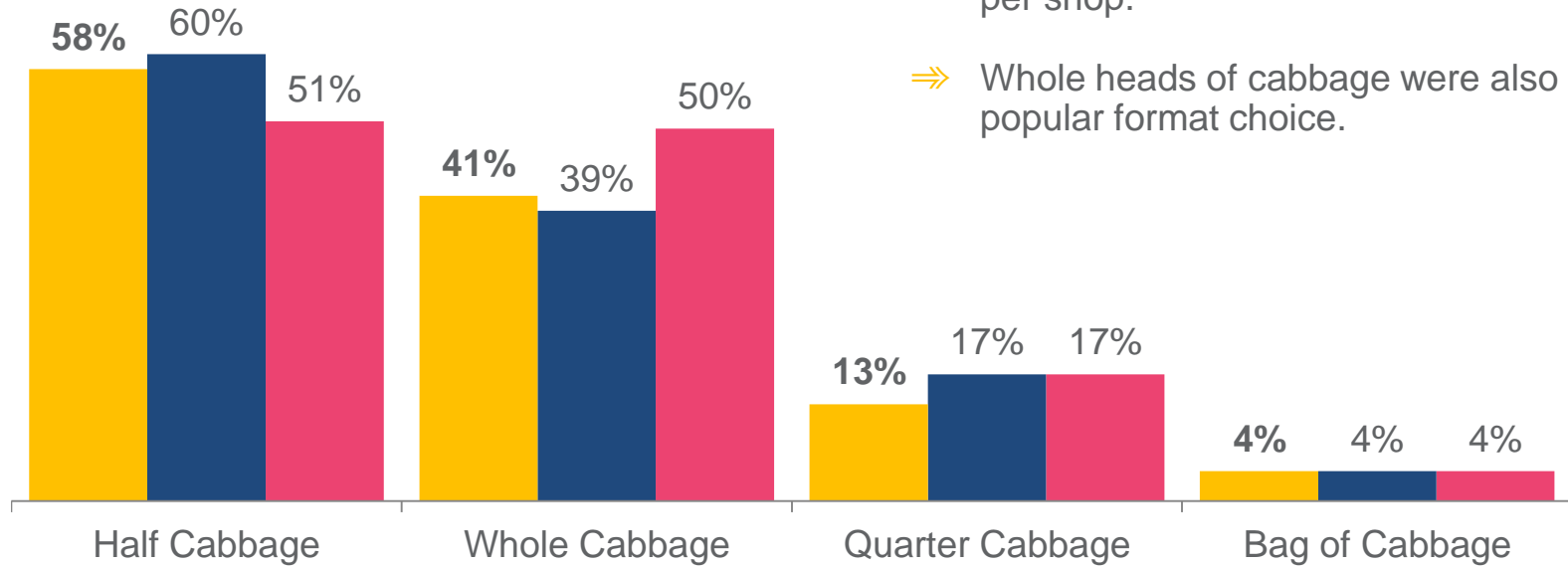
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)



- ▼ : Indicates LOWER score than current wave.
- ▲ : Indicates HIGHER score than current wave.



Pack Formats Purchased



- ⇒ Half heads of cabbage were the most common format purchased, typically one per shop.
- ⇒ Whole heads of cabbage were also a popular format choice.

■ Wave 3: August 2013
 ■ Wave 7: December 2013
 ■ Wave 11: April 2014

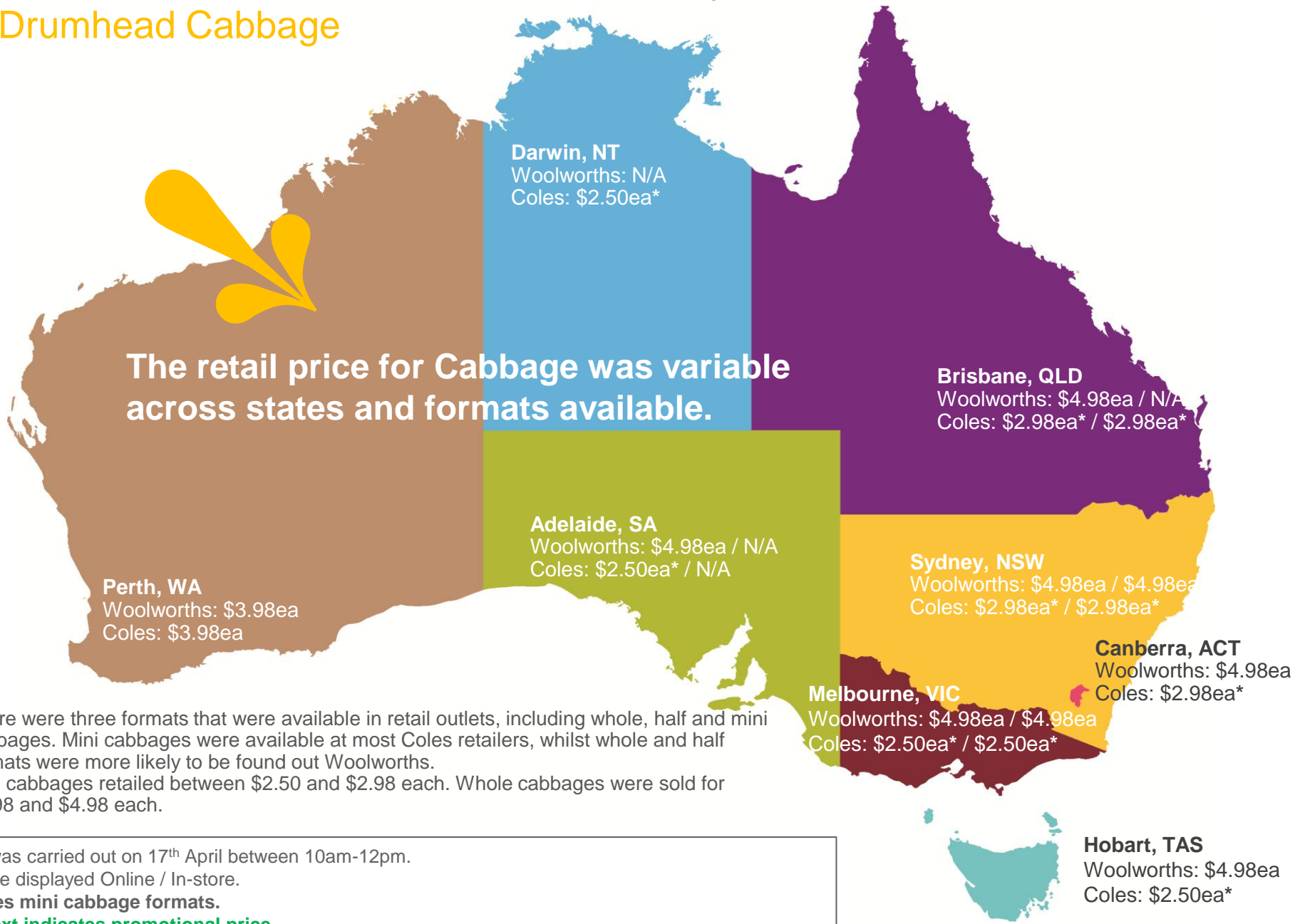
	Half Cabbage	Whole Cabbage	Quarter Cabbage	Bag of Cabbage
Wave 3	1.1	1.1	1.3	1.8
Wave 7	1.1	1.1	1.4	1.1
Wave 11	1.1	1.2	1.3	1.6

Q3a. How much <commodity> does this typically equate to?
 Sample Wave 3, N=502, Wave 7, N=317 and Wave 11 N=304



Online and In-store Commodity Prices

Drumhead Cabbage



The retail price for Cabbage was variable across states and formats available.

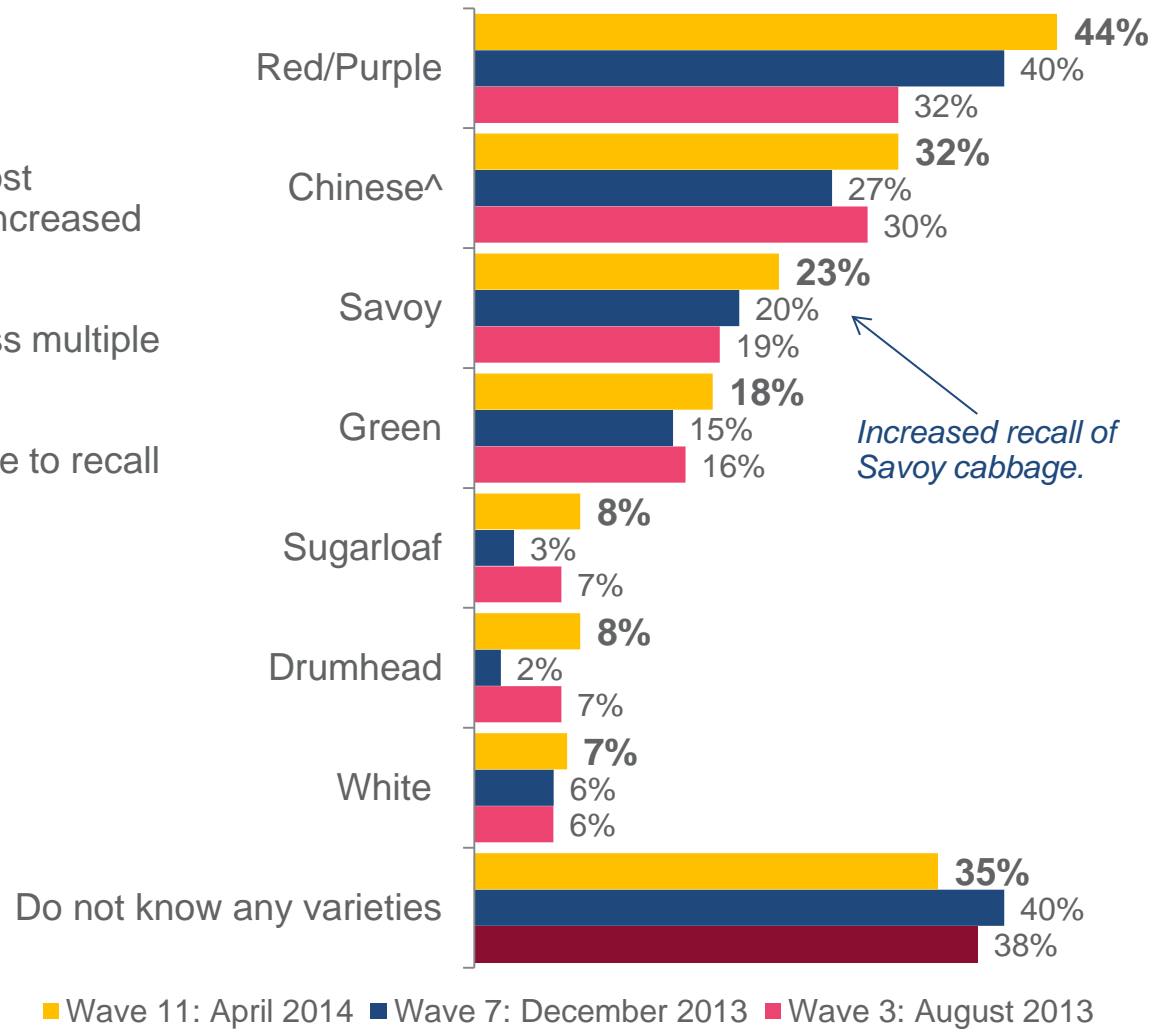
- There were three formats that were available in retail outlets, including whole, half and mini cabbages. Mini cabbages were available at most Coles retailers, whilst whole and half formats were more likely to be found out Woolworths.
- Mini cabbages retailed between \$2.50 and \$2.98 each. Whole cabbages were sold for \$3.98 and \$4.98 each.

Pricing was carried out on 17th April between 10am-12pm.
 Prices are displayed Online / In-store.
 *Indicates mini cabbage formats.
 Green text indicates promotional price.



Spontaneous Awareness

- ▶ Red/Purple varieties remained the most recalled type of cabbage, which has increased from previous waves.
- ▶ There was a level of awareness across multiple types of cabbage.
- ▶ Over a third of consumers were unable to recall a type of cabbage.

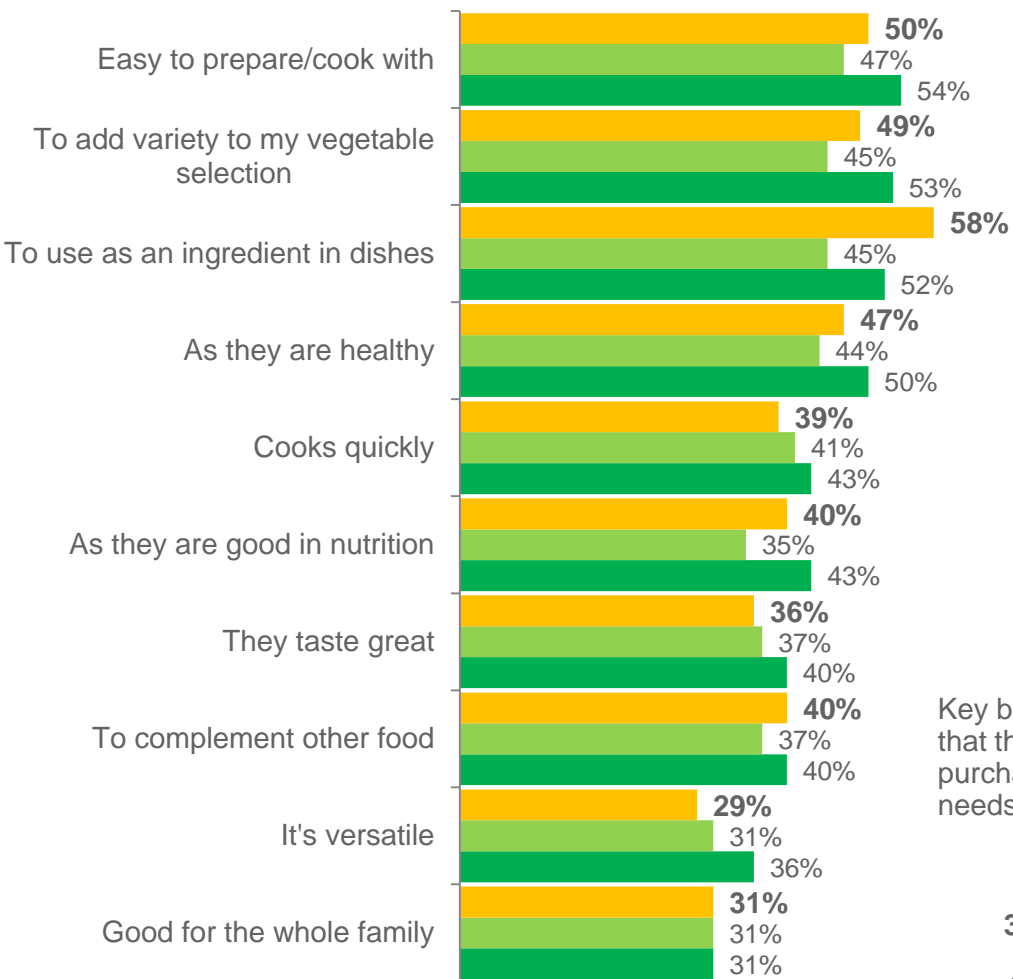


Sample Wave 3, N=502, Wave 7, N=317 and Wave 11 N=304
 Q6a. What varieties of <commodity> are you aware of? (unprompted)
 ^There was a level of misattribution that Wombok (Chinese) is a type of cabbage

Triggers & Barriers to Purchase

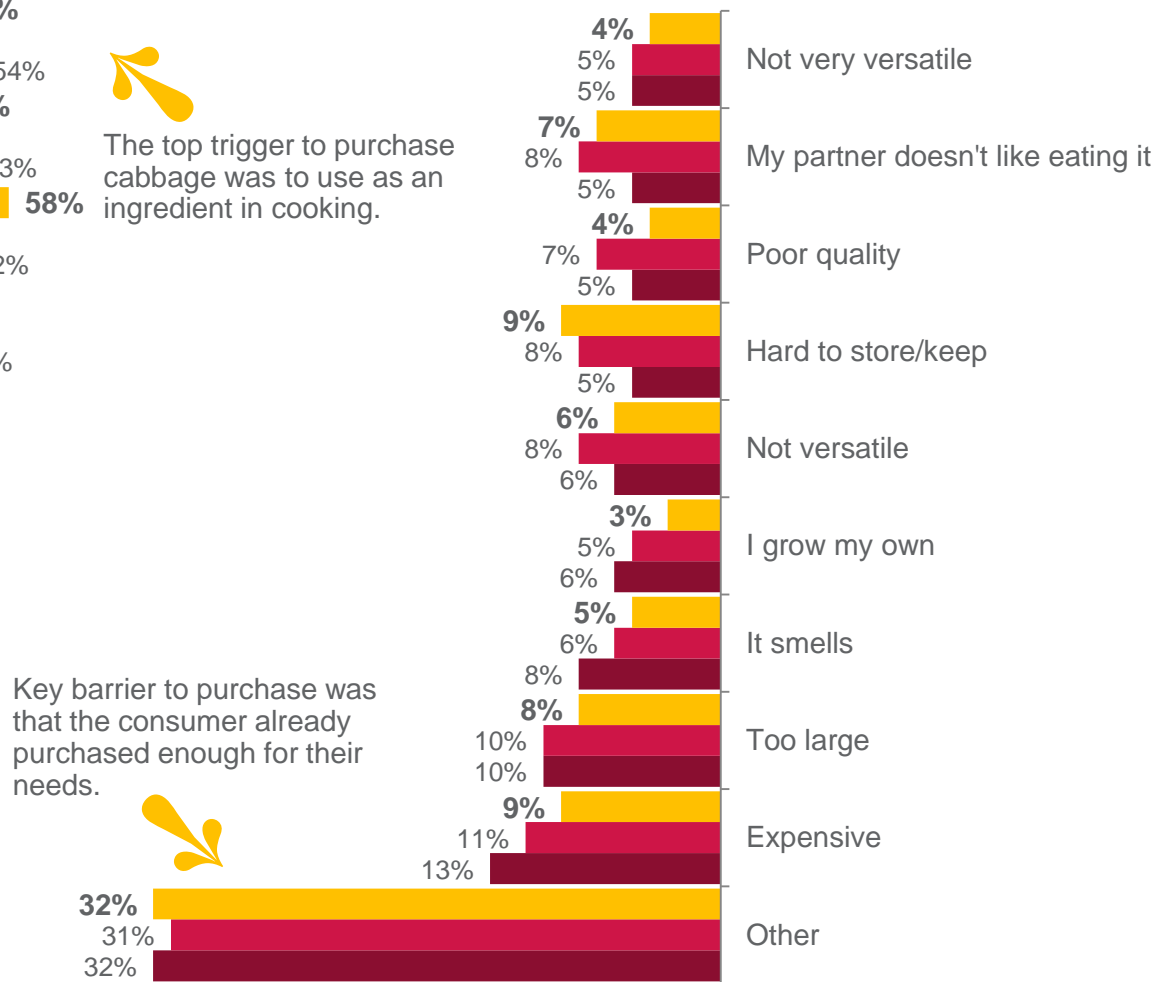


Triggers



The top trigger to purchase cabbage was to use as an ingredient in cooking.

Barriers



Key barrier to purchase was that the consumer already purchased enough for their needs.

■ Wave 11: April 2014 ■ Wave 7: December 2013 ■ Wave 3: August 2013

■ Wave 11: April 2014 ■ Wave 7: December 2013 ■ Wave 3: August 2013

Sample Wave 3, N=502, Wave 7, N=317 and Wave 11 N=304
 Q7. Which of the following reasons best describes why you purchase <commodity>?
 Q8. Which reason best describes why you don't buy <commodity> more often?

→ Cooking Cuisine & Occasions



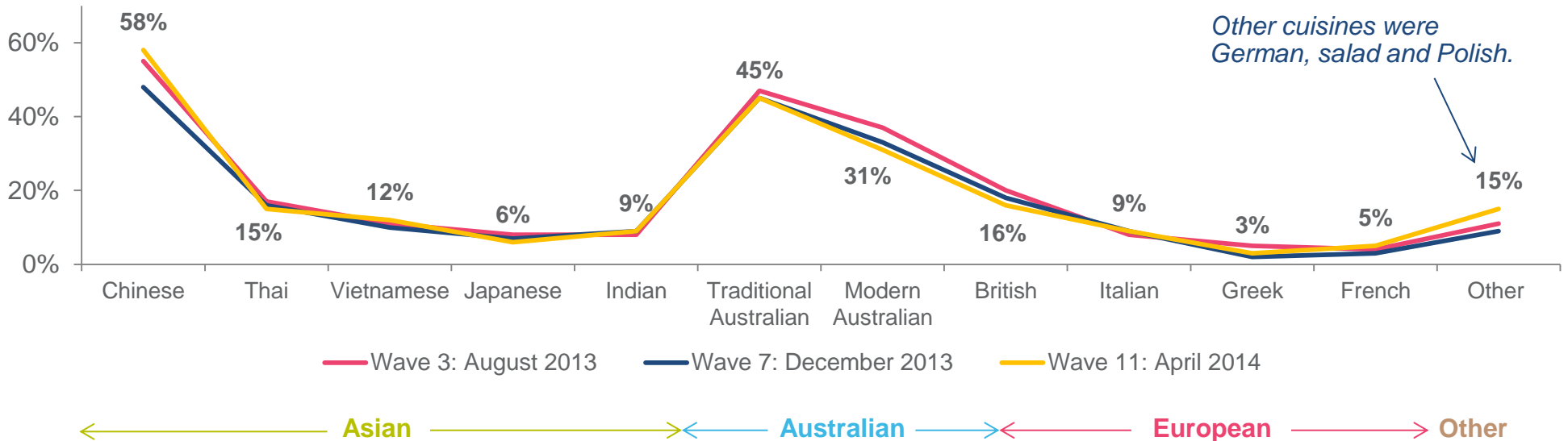
- ▶ Asian cuisine remained the most popular cuisine cooked. Over the previous waves there has been an increase in cooking cabbage in Chinese cuisine.
- ▶ Weekday dinner was the key consumption occasion, followed by family meals and weekend dinners.



Wave 11 Top 5 Consumption Occasions

	Wave 10	Wave 7	Wave 3
Weekday dinner	55%	▲	▲
Family meals	40%	▼	—
Weekend dinner	32%	▲	▲
Quick meals	26%	▲	▲
Everyday	22%	▲	▲

Typical Cuisine Cooked



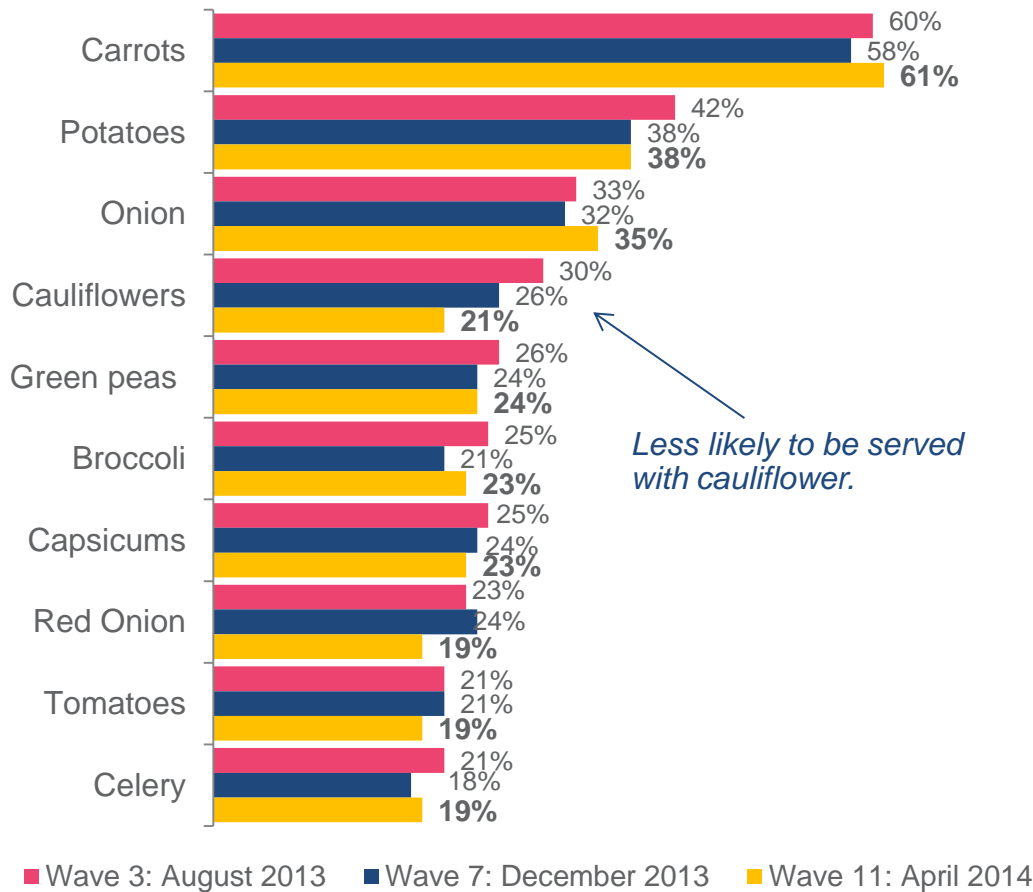
Sample Wave 3, N=502, Wave 7, N=317 and Wave 11 N=304
 Q10. What cuisines do you cook/consume that use <commodity>?
 Q11. Which of the following occasions do you typically consume/use <commodity>?



Cooking Preferences



Top 10 Accompanying Vegetables



- ⇒ Cabbage was typically served with carrots, potatoes and onions.
- ⇒ The most common cooking method was stir-frying, which has increased since Wave 7, but is in line with the popularity of Asian cuisine.

Top 10 Cooking Styles			
	Wave 3	Wave 7	Wave 11
Stir frying	58%	47%	60%
Steaming	45%	40%	44%
Raw	42%	40%	45%
Boiling	38%	31%	29%
Soup	27%	19%	28%
Sautéing	22%	19%	25%
Stewing	14%	14%	15%
Microwave	12%	14%	8%
Shallow Frying	9%	8%	10%
Blanche	8%	7%	11%

Sample Wave 3, N=502, Wave 7, N=317 and Wave 11 N=304

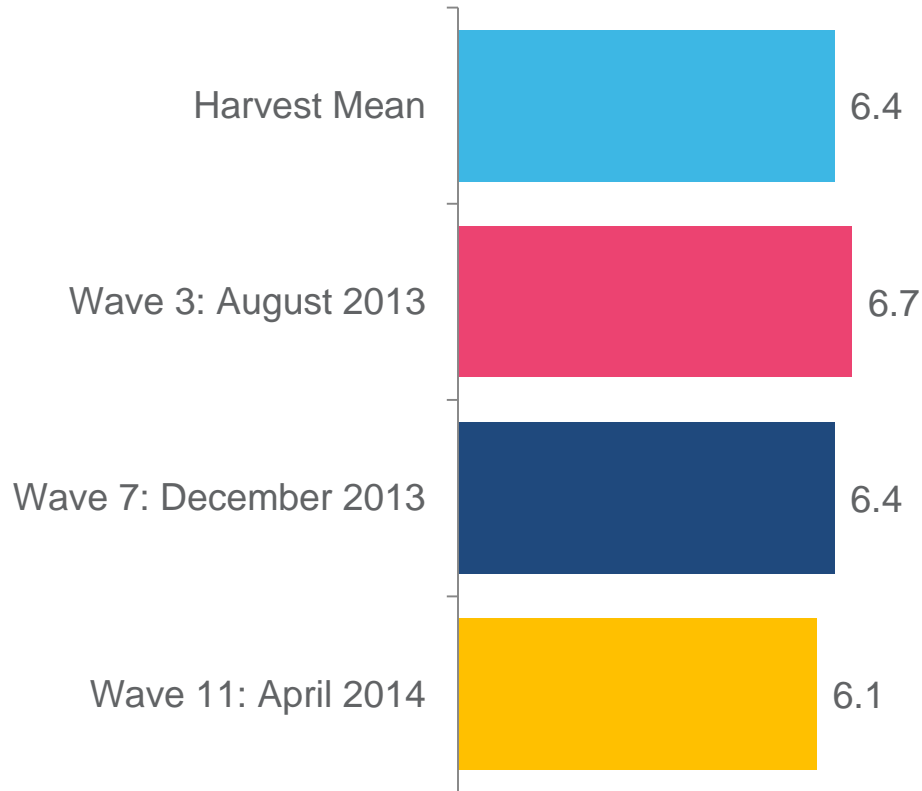
Q9. How do you typically cook <commodity>?

Q10a. And when are you serving <commodity> which of the following do you also serve together with this?

Importance of Provenance



⇒ Importance of provenance has continually decreased across waves. The current wave is lower than the Harvest mean, indicating a low perceived importance to consumers.



Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 3, N=502, Wave 7, N=317 and Wave 11 N=304



Freshness and Longevity

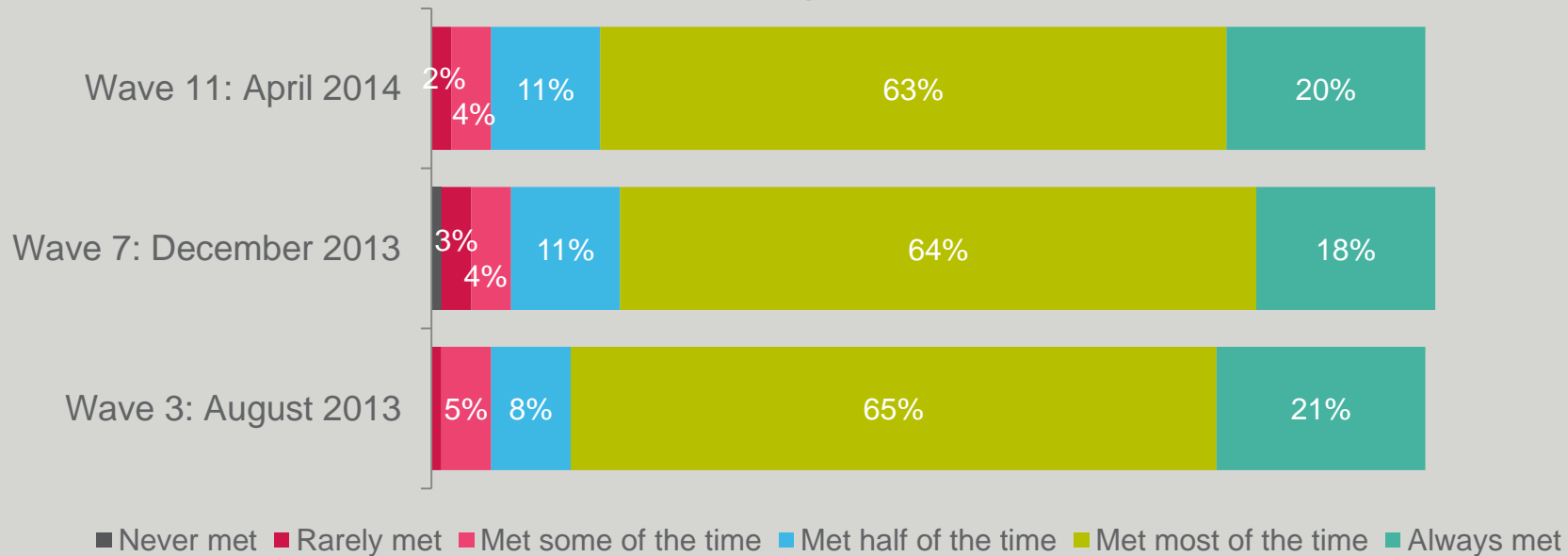


Expected to stay fresh for **10.9 days**

- ▲ 10.4 days, Wave 3
- ▲ 10.3 days, Wave 7

- ⇒ Cabbage was expected to remain fresh for over 10 days, consistent with previous months.
- ⇒ Consumer expectations of freshness were typically met and on trend with Wave 3 and 7.

Expectations Met



Sample Wave 3, N=502, Wave 7, N=317 and Wave 11 N=304
 Q12. How long do you expect <commodity> to stay fresh for, once you have purchased it?
 Q13. How often is this length of freshness met when you buy <commodity> ?

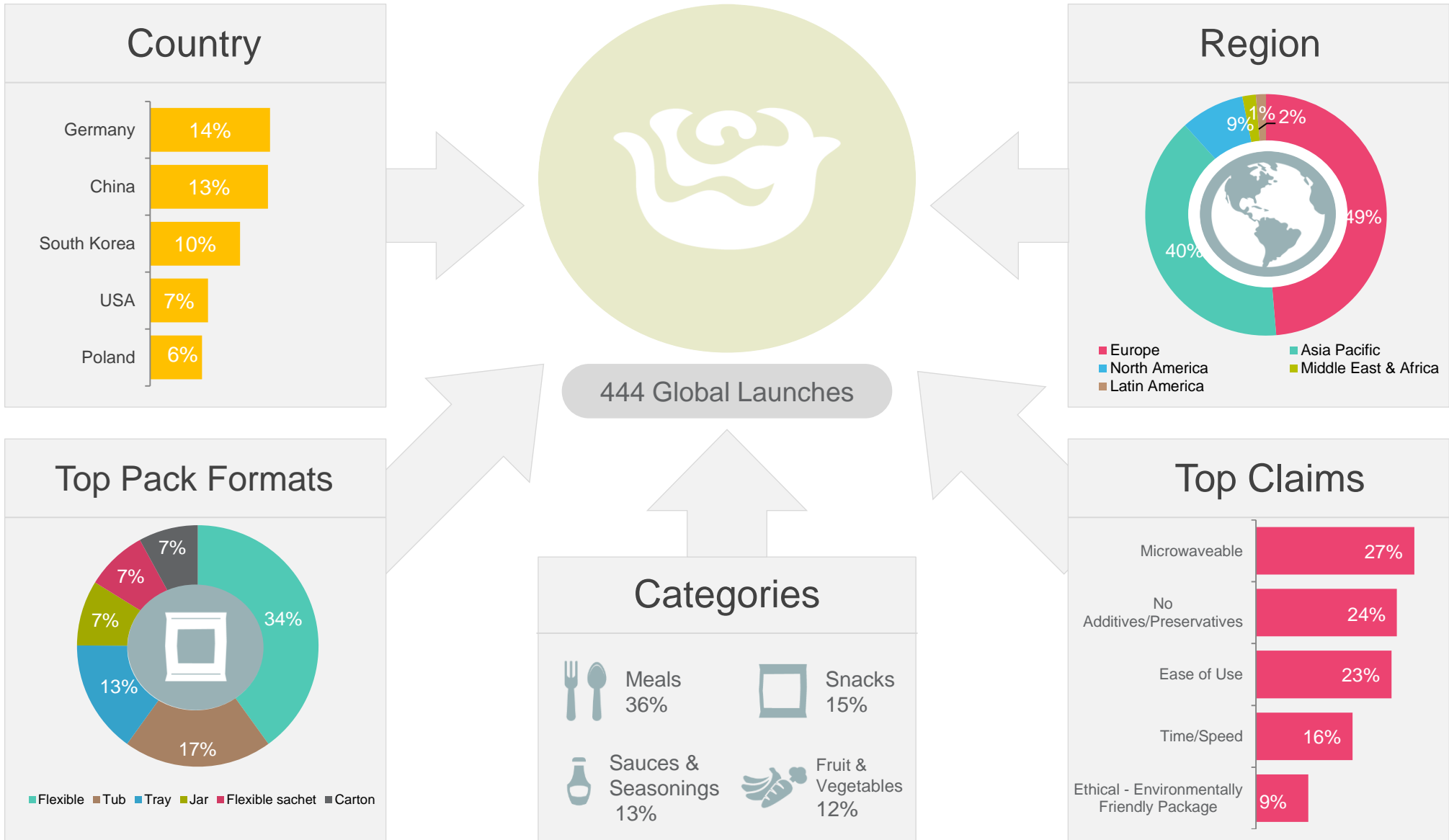


Trends: Cabbage

Cabbage Global NPDs

February - April 2014

There were 444 global launches of products containing Cabbage as an ingredient. The majority of launches occurred in Europe & Asia Pacific. Convenience and no additives/preservatives claims were common with products launched. The most commonly launched product were meals and snacks.





Cabbage Product Launches: Last 3 Months (February – April 2014) Summary

- There were 444 products containing cabbage as an ingredient that were launched globally. This was consistent with the number of launches in previous trends.
- There were three Australian launches including a soup, salad mix and dumplings.
- Europe (49%) and Asia Pacific (40%) were the dominant launch regions for cabbage products. Whilst Germany, China and South Korea were the main countries for launches.
- Over a third of products launched were meals and meal centres (36%). Snacks (15%) and sauces and seasonings (13%) were also common categories for products.
- Microwavable was the top claim utilised (27%). Other convenience claims were also common on products, including ease of use and time/speed.
- The most innovative product launched was Ivenet Bebe Recipe Baby Food Seasoning with Hijiki Seaweed, Kelp and Mixed Vegetables (see following pages).



Source: Mintel (2014)

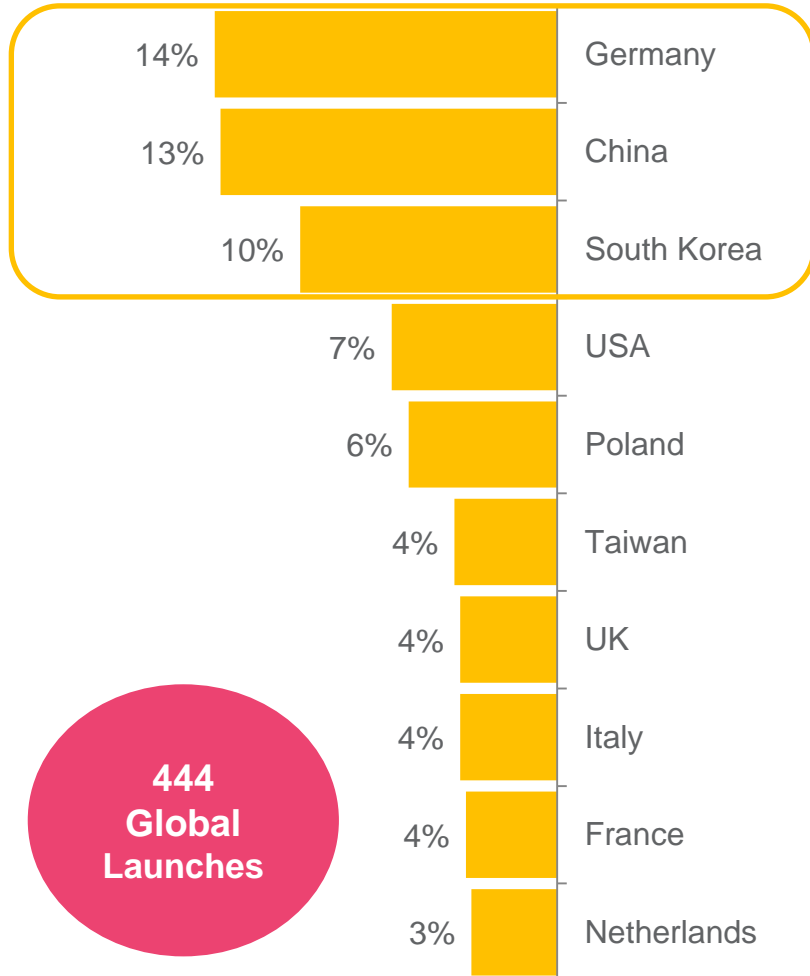


Cabbage Launches

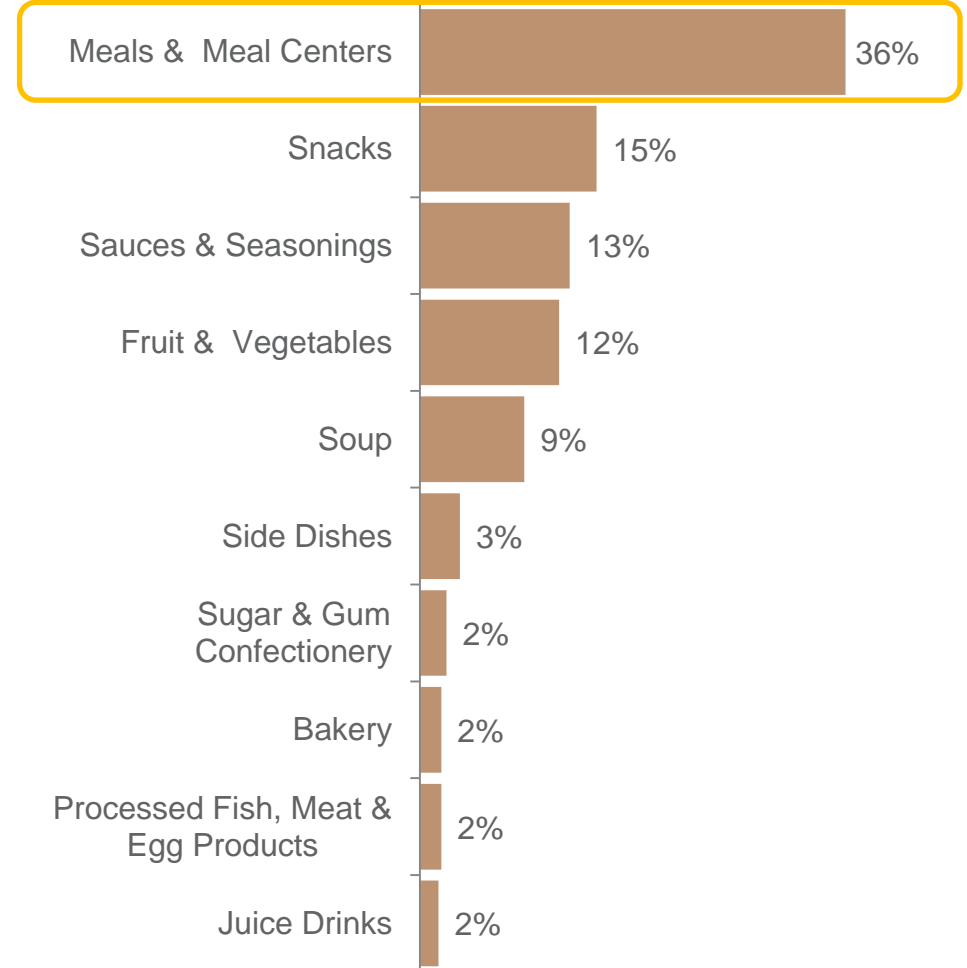
Country & Categories

- Meals and meal centers remained the top launch category for cabbage products.
- Germany, China and South Korea were the main countries for products launched.

Top 10 Launch Countries



Top 10 Launch Categories



444
Global
Launches

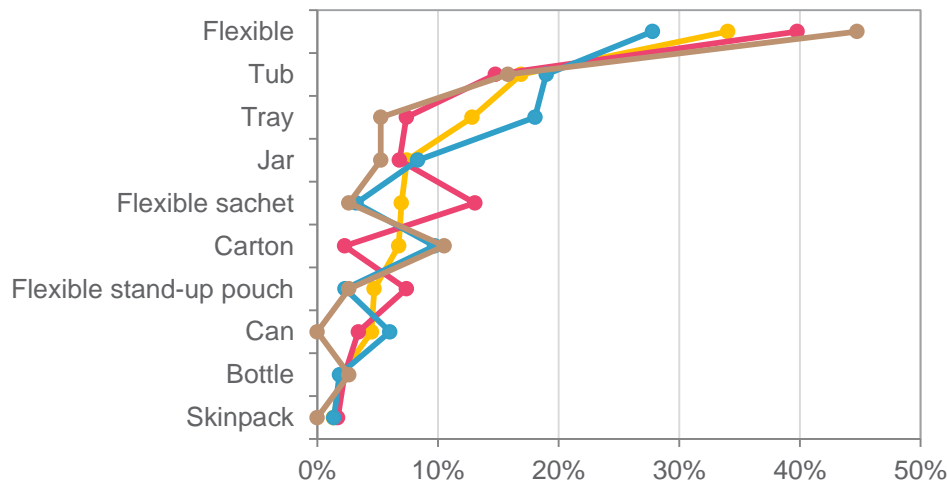


Cabbage Launches

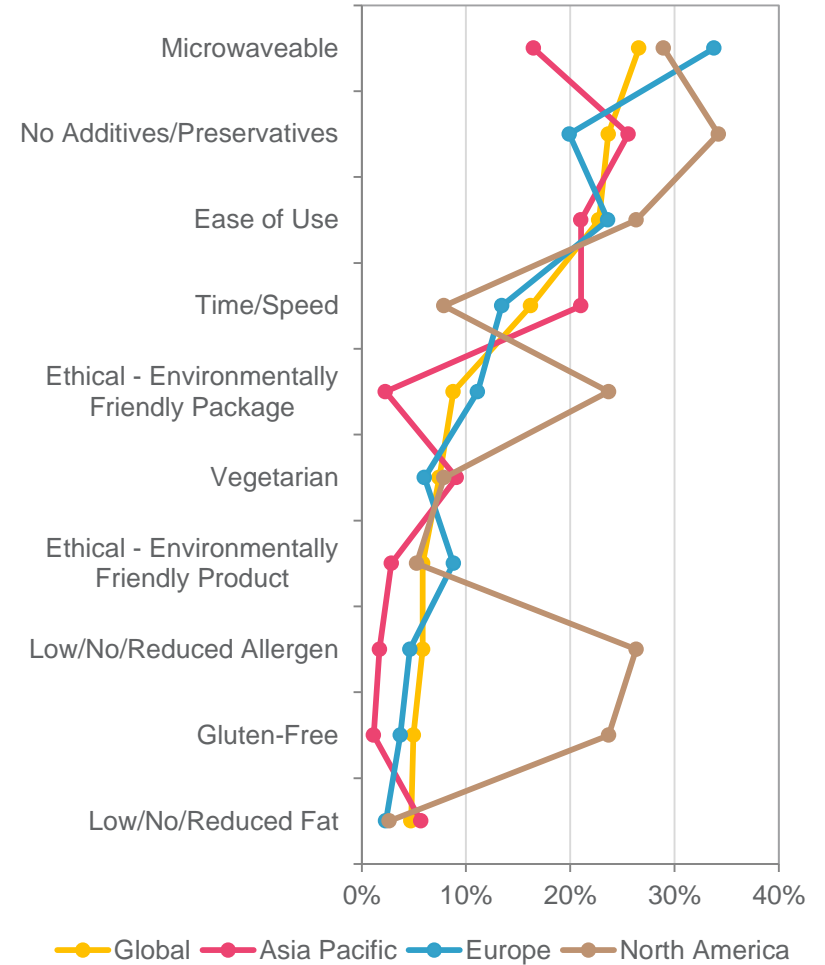
Top Claims & Pack Formats Used

- ▶ Packaging was consistent across regions, with flexible formats predominately favoured.
- ▶ Microwavable was the most used claim over the last three months.
- ▶ North America were more likely to use health claims, such as no additives, low allergens and gluten free compared with other regions.

Pack Formats Launched



Claims Launched



- Global
- Asia Pacific
- Europe
- North America

»»» Innovative Cabbage Launches: L3M (February-April 2014)

100% Mixed Vegetable & Fruit Juice with Green Vegetable (Vietnam)

Features a Nutri Mix formula of eight veggies and six fruits. It contains chlorophyll, and is high in vitamin A & C to offer good taste and good benefits. The product is ready to use or can also be mixed with other beverages.



Claims:
Halal, No Additives/Preservatives, Social Media, Ease of Use

Kühlmann Cabbage Salad with Crunchy Fresh Peppers (Germany)

Has been repackaged in a new pack that is designed to be old fashioned. The product is free from added flavour enhancers, sweeteners, flavouring and preservatives and retails in a 350g tub.



Claims:
No Additives/Preservatives

Sys Dania Babci Zosi Ukrainian Borscht Soup (Poland)

Sys Dania Babci Zosi Zupa Barszcz Ukrainski (Ukrainian Borscht Soup) has been repackaged and now retails in a new 75g pack. The product is suitable for vegetarians, is free from preservatives, and is described as a dried vegetable mix sufficient to make 1L of soup in a few minutes.



Claims:
No Additives/Preservatives, Vegetarian, Time/Speed

Synear Refreshing Vegetarian Spring Rolls (China)

Synear Qing Shuang Quan Su Chun Juan (Refreshing Vegetarian Spring Rolls) take only two to three minutes to prepare. This product retails in a 306g pack containing 18 units.



Claims:
Vegetarian, Time/Speed

➤➤➤ Innovative Cabbage Launches: L3M (February-April 2014)

Dongwon Yangban Crisp Kimchi (South Korea)

Dongwon Yangban Crisp Kimchi is made with all Korean ingredients and contains ripened persimmon from Daebong. This HACCP certified product retails in a 1kg pack.



Claims:
No information available

Zosi Agro Novobranicke Sauerkraut (Czech Republic)

Zosi Agro Novobranicke Kysane Zeli (Novobranicke Sauerkraut) is now available. The South Moravian quality product retails in a 1000g pack.



Claims:
No information available

B!O Organic Red Cabbage with Apples (Germany)

B!O Bio-Apfelrotkohl (Organic Red Cabbage with Apples) has been repackaged. It is already seasoned and can be heated in the microwave. This organic product is frozen in portions and retails in a newly designed 750g pack.



Claims:
Ease of Use, Organic, Microwaveable

Ivenet Bebe Recipe Baby Food Seasoning with Hijiki Seaweed, Kelp and Mixed Vegetables (South Korea)

Ivenet Bebe Recipe Baby Food Seasoning with Hijiki Seaweed, Kelp and Mixed Vegetables is made of 100% Korean fibre-rich ingredients without any artificial additives such as preservative, colouring and flavouring. Its ingredients have been quick freeze dried in order to retain the original flavour and nutrition.



Claims:
No Additives/Preservatives, Babies & Toddlers (0-4), High/Added Fiber

»»» Innovative cabbage Launches: L3M (February-April 2014)

Bonpreu Chinese Salad in Vinegar (Spain)

Bonpreu Amanida Xinesa amb Vinagre (Chinese Salad in Vinegar) has been repackaged in a 345g jar with a new design. The first quality product is free of egg, milk and gluten.



Claims:
Gluten-Free, Low/No/Reduced Allergen

Binggrae Khao Phat by Ahan Thai Mild Stir-Fried Prawn Rice (South Korea)

Binggrae Khao Phat by Ahan Thai Mild Stir-Fried Prawn Rice is made with Korean ingredients including IQF freeze-dried rice and fresh vegetables. This microwavable product is described as convenient and delicious. It retails in a 450g pack providing two servings.



Claims:
Ease of Use, Microwaveable

Seoul Chinese Cabbage Kimchi (Thailand)

Seoul Chinese Cabbage Kimchi is said to be made with the original recipe from the Seoul Restaurant (Thonglor) and contains selected natural ingredients. The product can be used for making kimchi soup, kimchi fried rice, kimchi sour soup or kimchi with fried pork. The product contains no added preservatives and retails in a 120g resealable pack.



Claims:
No Additives/Preservatives, Convenient Packaging

Traditional Stuffed Cabbage with Duck (France)

Comtesse du Barry Choux Farci à l'Ancienne au Canard (Traditional Stuffed Cabbage with Duck) is free from added colourings and preservatives and can be oven or microwave heated. It can be served with pilaf rice and raisins, or a salad seasoned with cider vinegar and hazelnut oil. The product retails in a 600g pack which provides four servings.



Claims:
No Additives/Preservatives, Microwaveable



Australian Cabbage Launches: L3M (February-April 2014)

Campbell's Country Ladle Café Style Spicy Red Capsicum, Tomato & Brown Rice Soup

Campbell's Country Ladle Café Style Spicy Red Capsicum, Tomato & Brown Rice Soup is a spicy combination of chopped red capsicum and tomatoes, wholesome brown rice, seasoned with an aromatic collection of herbs and spices. It is 97% fat free, is a source of fibre and contains more than one serve of vegetables in every bowl.



Claims:

No Additives/Preservatives, Ethical - Environmentally Friendly Package, Low/No/Reduced Fat, Microwaveable, Ease of Use, Wholegrain

Woolworths Select Australian Grown Summer Lettuce

Woolworths Select Australian Grown Summer Lettuce is described as a tasty combination of sweet lettuce and crunchy red cabbage. This washed and ready-to-use product retails in a 200g pack.



Claims:

Ease of Use, Seasonal

Pacific West Japanese Gyoza

Pacific West Japanese Gyoza is now available on the market. The product retails in a 700g mega value pack containing 28 pieces.



Claims:

Economy



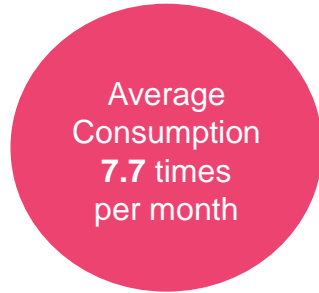
Celery.



Purchase and Consumption Behaviour

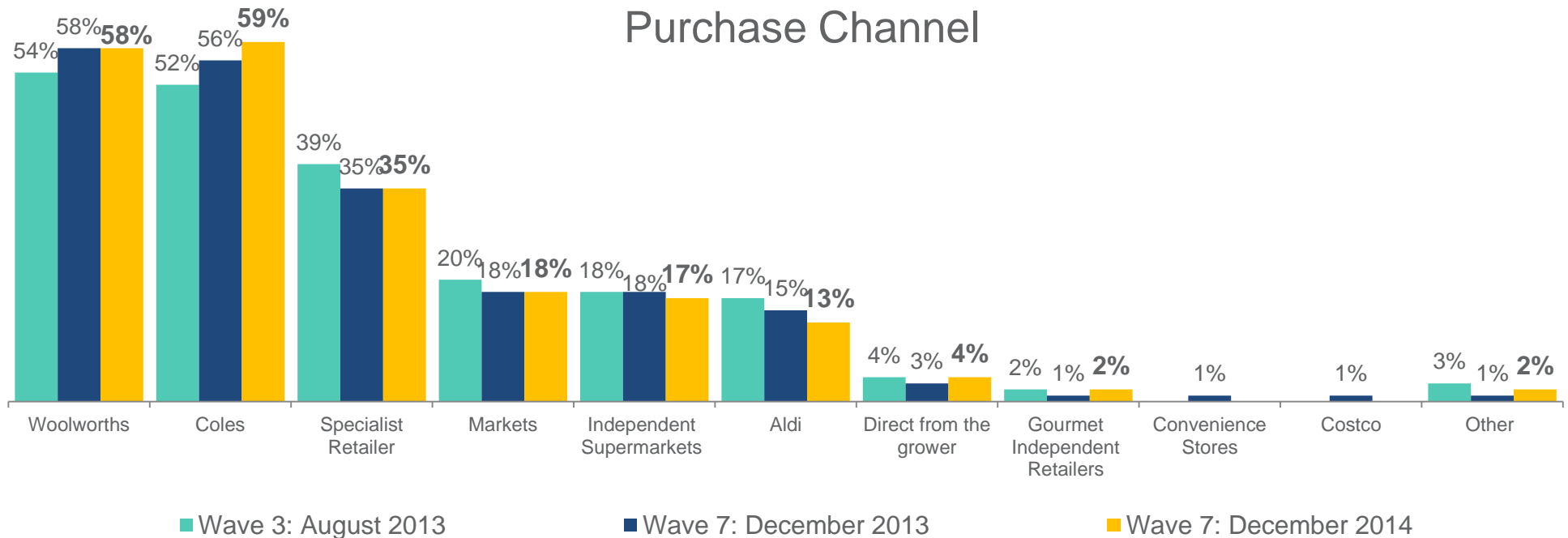


- ▲ 2.8 times, Wave 3
- ▲ 3.1 times, Wave 7



- ▲ 8.5 times, Wave 3
- ▲ 9.3 times, Wave 7

- ▶ Purchase and consumption of celery was lower compared with previous waves. Peak purchase and consumption was in December 2013.
- ▶ Mainstream retailers were the key purchase channels for celery. With an increase in purchase from Coles across past waves.



Q1. On average, how often do you purchase <commodity>?
 Q2. On average, how often do you consume <commodity>?
 Q5. From which of the following channels do you typically purchase <commodity>?
 Sample Wave 3, N=505, Wave 7, N=339, Wave 11 N=304

➔➔➔➔➔ Average Spend and Price Sensitivity



Average weight of purchase

The average consumer typically purchased 700g of Celery in April 2014, this was consistent with previous months.

- ▲ 800g, Wave 3
- ▲ 800g, Wave 7



Recalled last spend

The average recalled last spend on Celery was \$2.50. This was in line with past waves.

- \$2.50, Wave 3
- ▲ \$2.80, Wave 7



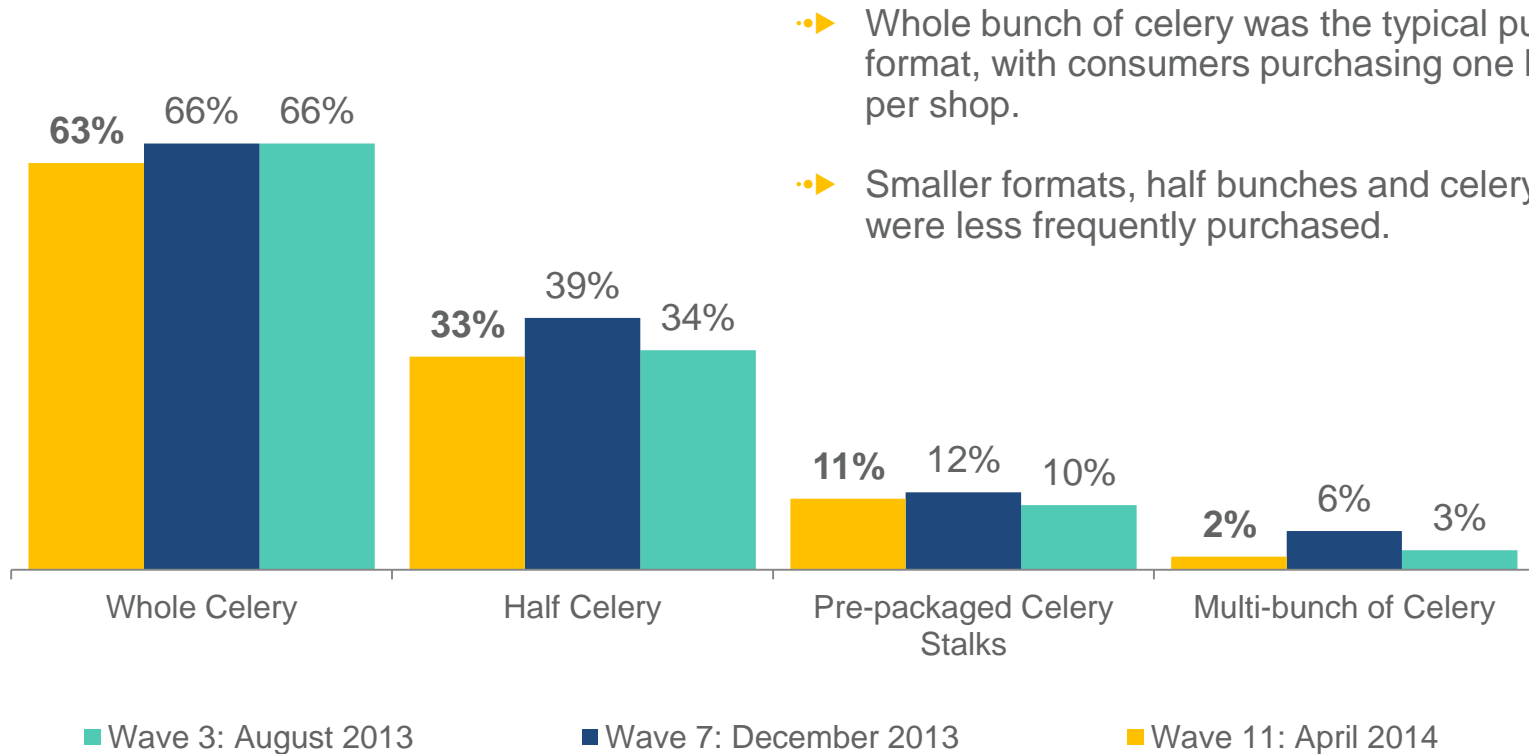
Value for money

On average, consumers perceived Celery to be good value for money (6.2/10), which was higher than December last year.

- ▲ 6.5/10, Wave 3
- ▼ 6.1/10, Wave 7

Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? 0-10 scale
Sample Wave 3, N=505, Wave 7, N=339, Wave 11 N=304

➤➤➤ Pack Formats Purchased



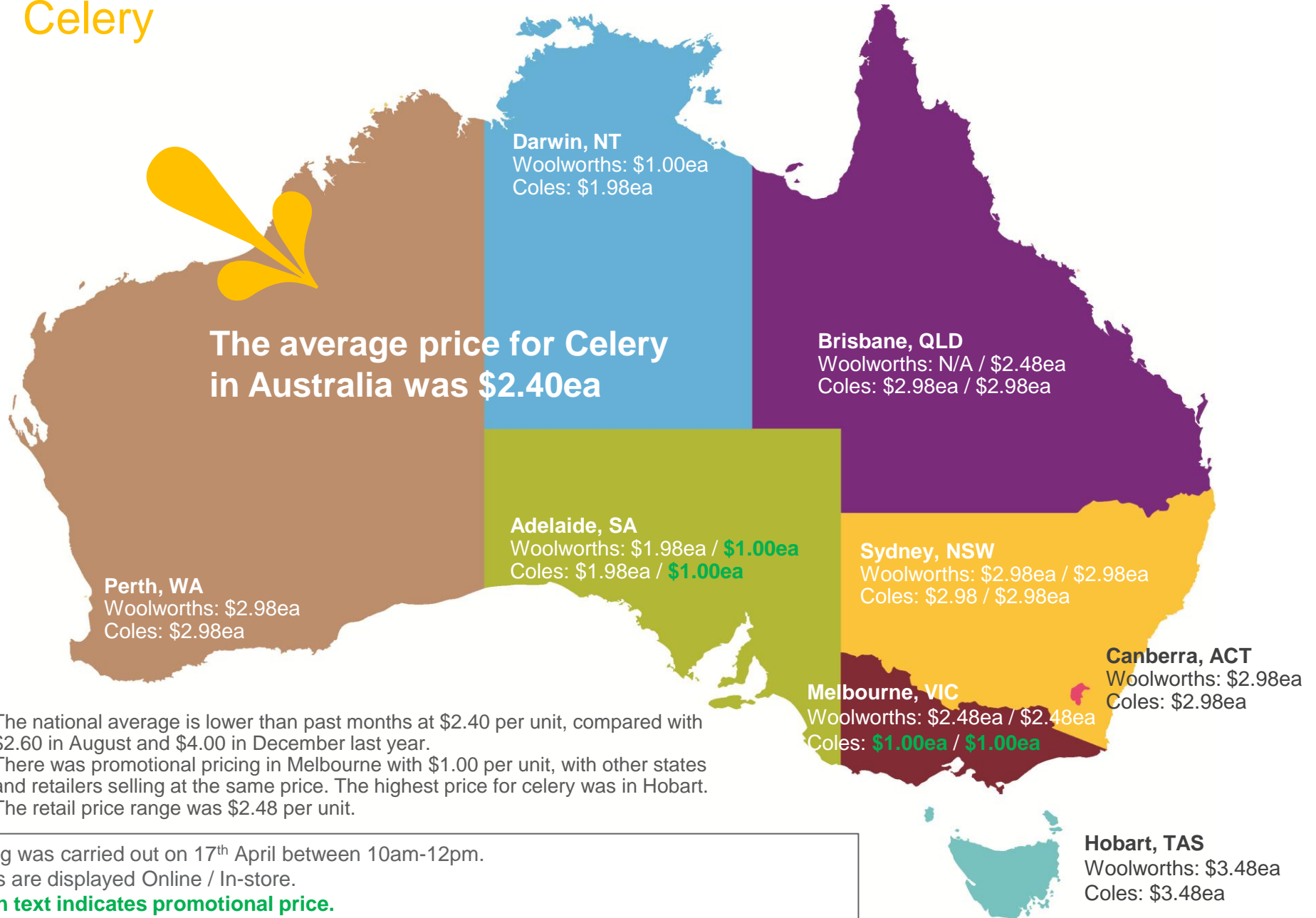
- ▶ Whole bunch of celery was the typical purchase format, with consumers purchasing one bunch per shop.
- ▶ Smaller formats, half bunches and celery stalks were less frequently purchased.

	Whole Bunch	Half Bunch	Pre-packed Stalks	Multi-bunch
Wave 3	1.1	1.1	1.7	1.5
Wave 7	1.2	1.1	1.7	1.3
Wave 11	1.1	1.1	1.5	1.9

Q3a. How much <commodity> does this typically equate to?
 Sample Wave 3, N=505, Wave 7, N=339, Wave 11 N=304

Online and In-store Commodity Prices

Celery



- The national average is lower than past months at \$2.40 per unit, compared with \$2.60 in August and \$4.00 in December last year.
- There was promotional pricing in Melbourne with \$1.00 per unit, with other states and retailers selling at the same price. The highest price for celery was in Hobart.
- The retail price range was \$2.48 per unit.

Pricing was carried out on 17th April between 10am-12pm.
Prices are displayed Online / In-store.

Green text indicates promotional price.



Spontaneous Awareness

- ▶ Awareness of celery varieties remained low, with 88% of consumers not being able to recall a type. This low level of recall was similar to Wave 3 (90%) and 7 (88%).
- ▶ Respondents who stated a type of celery recalled primarily by colour, 'green', or just named the vegetable, 'celery'.

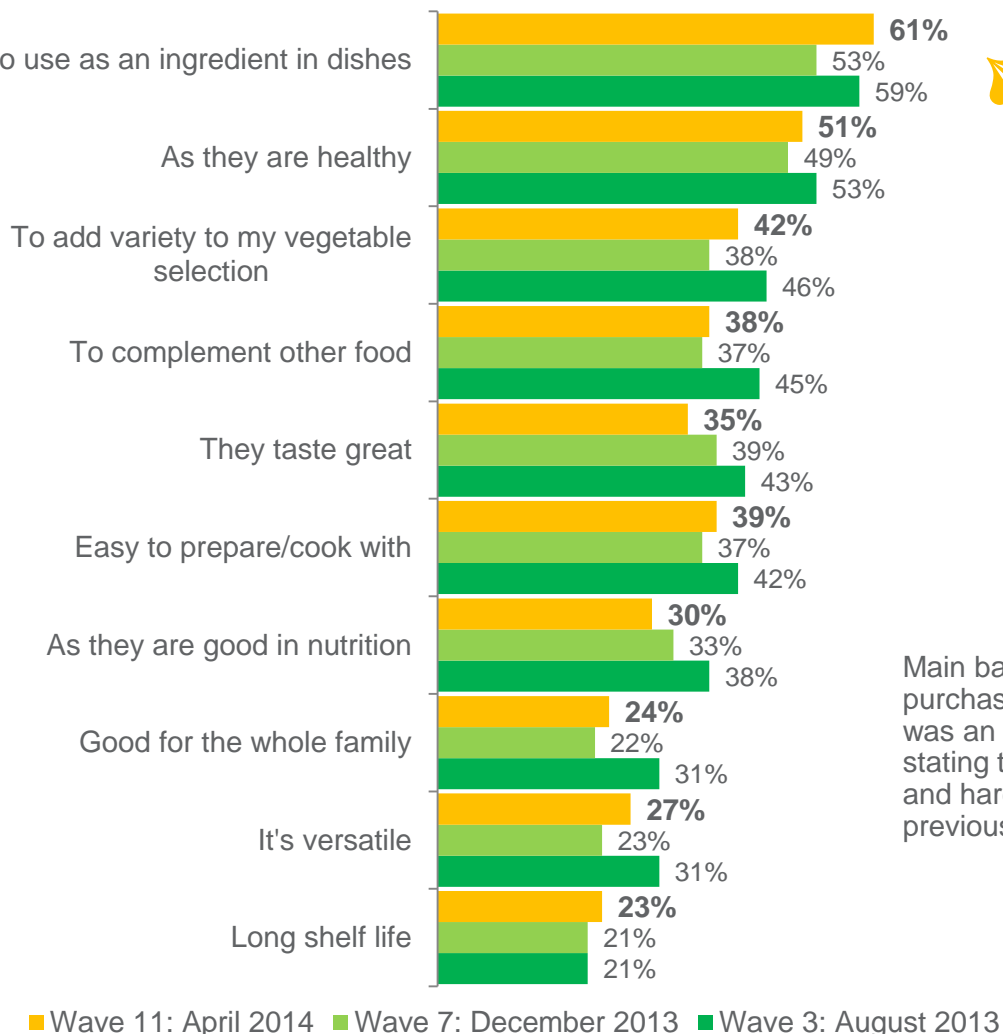




Triggers & Barriers to Purchase



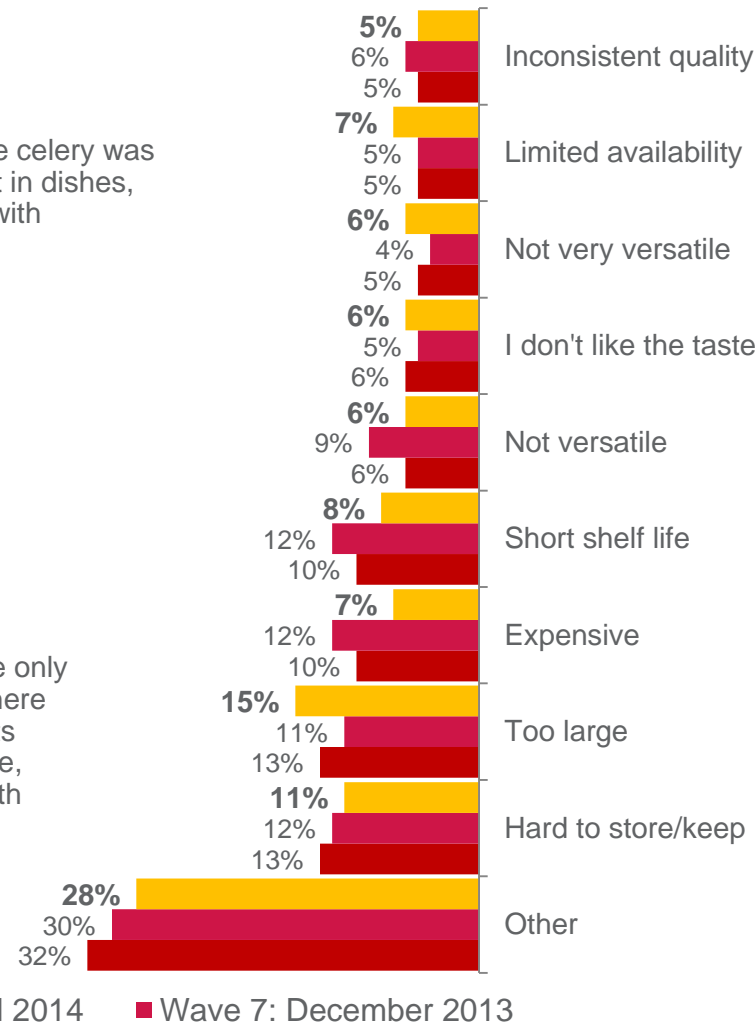
Triggers



Top trigger to purchase celery was to use as an ingredient in dishes, which was consistent with previous waves.

Barriers

Main barriers to purchase were only purchasing what they need. There was an increase in respondents stating that celery was too large, and hard to store compared with previous waves.



Sample Wave 3, N=505, Wave 7, N=339, Wave 11 N=304
Q7. Which of the following reasons best describes why you purchase <commodity> ?
Q8. Which reason best describes why you don't buy <commodity> more often?

»»» Cooking Cuisine & Occasions



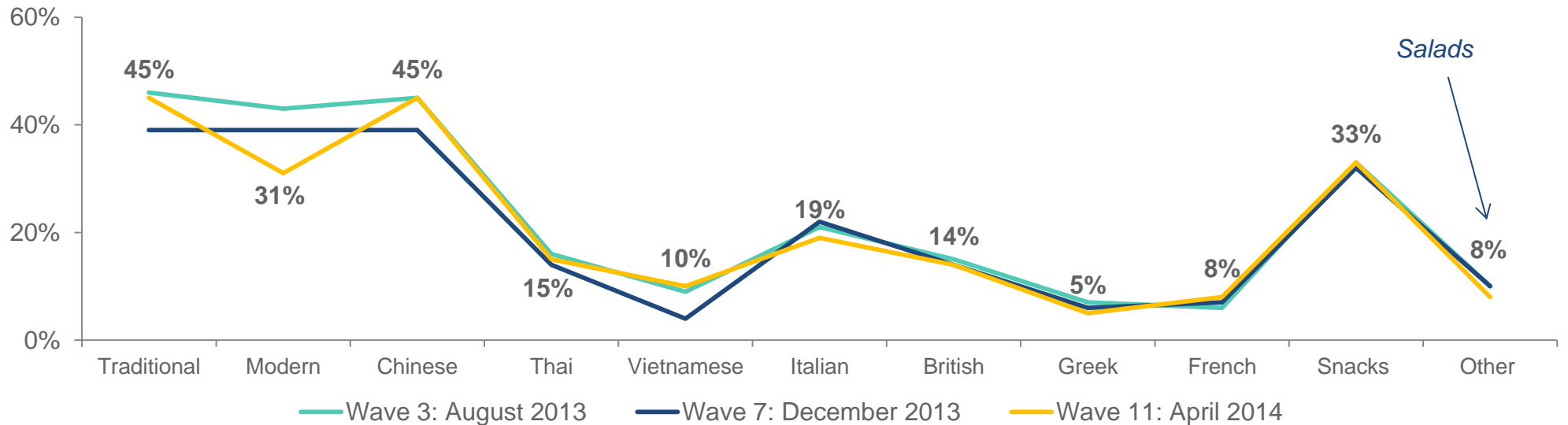
- ⇒ Celery was typically cooked in Australian cuisine, both traditional and modern. However, there was a decrease in modern Australian cooking over the past waves.
- ⇒ Consumption occasions were mainly weekday dinners and family meals.

Wave 11 Top 5 Consumption Occasions



	Wave 11	Wave 7	Wave 3
Weekday dinner	41%	▲	▲
Family meals	35%	▲	▼
Quick meals	28%	▼	▼
Individual snacks	27%	▲	▼
Weekend dinner	25%	▲	▲

Typical Cuisine Cooked



← Australian → ← Asian → ← European → ← Other →



▼ : Indicates LOWER score than current wave.
▲ : Indicates HIGHER score than current wave.

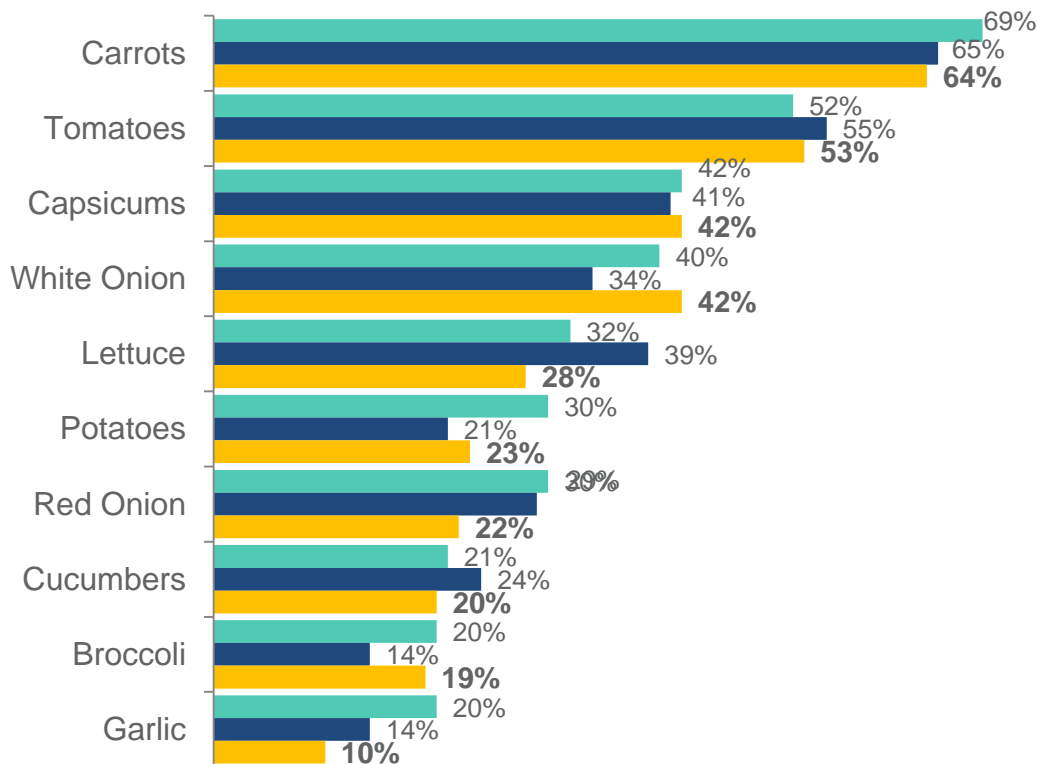
Sample Wave 3, N=505, Wave 7, N=339, Wave 11 N=304
Q10. What cuisines do you cook/consume that use <commodity> ?
Q11. Which of the following occasions do you typically consume/use <commodity> ?



Cooking Preferences



Top 10 Accompanying Vegetables



■ Wave 3: August 2013 ■ Wave 7: December 2013 ■ Wave 11: April 2014

- ⇒ Celery was generally served with carrots, tomatoes and capsicums, general base ingredients for recipes.
- ⇒ Celery was consumed raw on over half of consumption occasions. It was also used for stir-frying and soup.

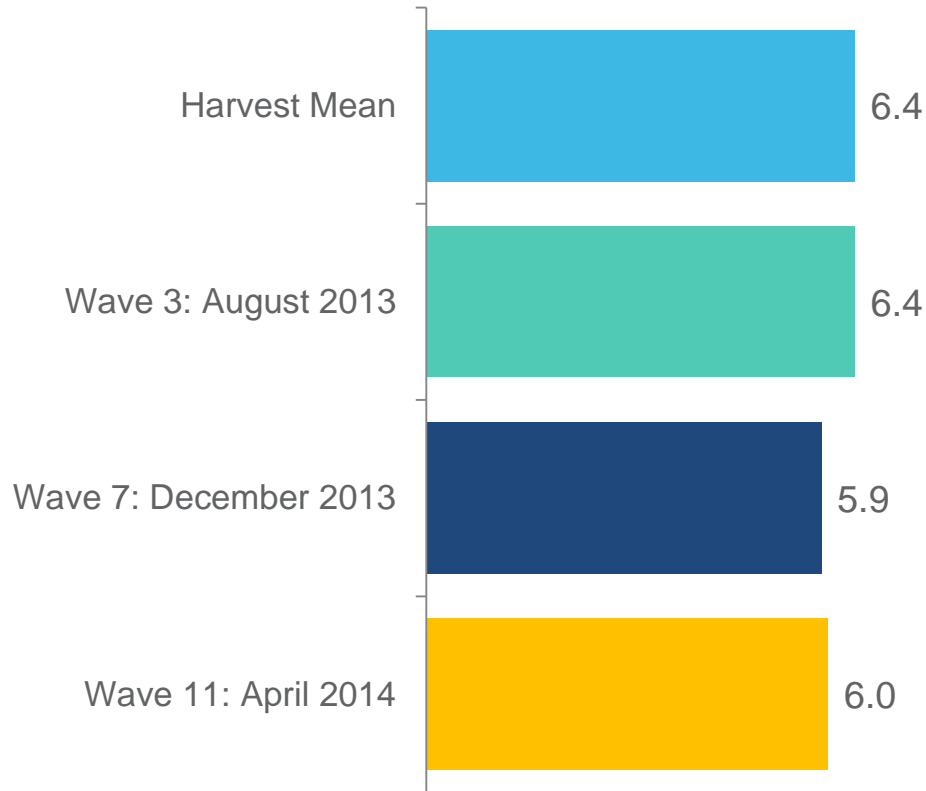
Top 10 Cooking Styles

	Wave 3	Wave 7	Wave 11
Raw	61%	68%	58%
Soup	56%	39%	46%
Stir frying	50%	40%	52%
Stewing	32%	28%	26%
Sautéing	11%	11%	10%
Steaming	10%	7%	12%
Boiling	7%	6%	9%
Blend	7%	5%	4%
Shallow Frying	6%	7%	8%
Other	6%	7%	4%

Importance of Provenance



⇒ Importance of Celery provenance was strongest in August 2013. In more recent waves, importance has decreased and was lower than the Harvest mean.



Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 3, N=505, Wave 7, N=339, Wave 11 N=304



Freshness and Longevity

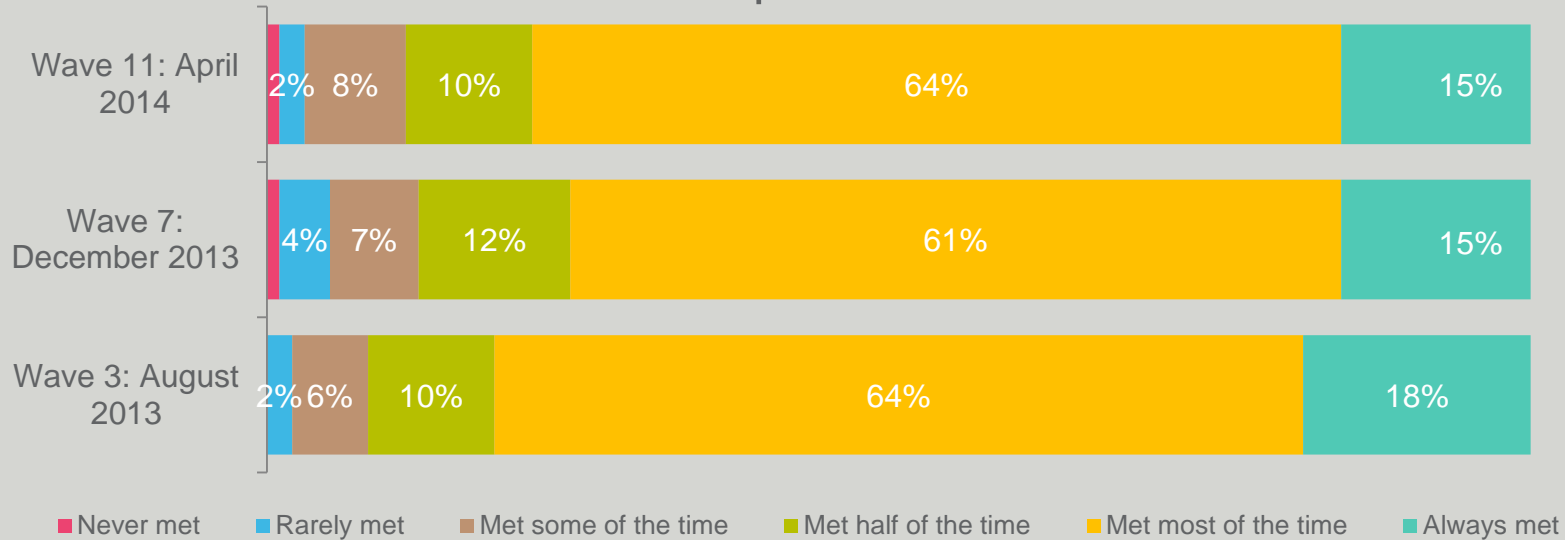


Expected to stay fresh for 9.5 days

- ⇒ Celery was expected to stay fresh for over nine days, which was consistent with previous months.
- ⇒ Expectations of freshness were generally met, and had increased since December 2014.

- ▲ 9.8 days, Wave 3
- ▲ 9.3 days, Wave 7

Expectations Met



Sample Wave 3, N=505, Wave 7, N=339, Wave 11 N=304
 Q12. How long do you expect <commodity> to stay fresh for, once you have purchased it?
 Q13. How often is this length of freshness met when you buy <commodity> ?



Trends: Celery

Celery NPDs

February – April 2014

Globally, there were 1208 celery products launched in the last three months, the majority of these launches occurred in Europe. Meals and sauces were the most common categories launched. Key claims used were microwavable and no additive/preservatives.





Celery Product Launches: Last 3 Months (February –April 2014) Summary

- There was a large number of products launched globally, 1208, that contained celery as an ingredient. This was on trend with previous waves.
- There were six products launched in Australia, still a small number in the overall product development market.
- The majority of launches occurred in Europe (63%), especially in Germany (19%). This was on trend with previous waves.
- Flexible packaging (18%) and trays (14%) remained the most common pack format used over the last three months.
- Meals (25%) and sauces and seasoning (20%) remain common categories for celery products.
- Core claims used were health and convenience related; microwavable (33%), no additives (29%), ease of use (19%) and low allergen (12%).
- The most innovative celery product launched was Pineapple, Celery and Nopal Flavoured Drinking Yogurt in Mexico (other examples of these can be found in the following pages).



Source: Mintel (2014)

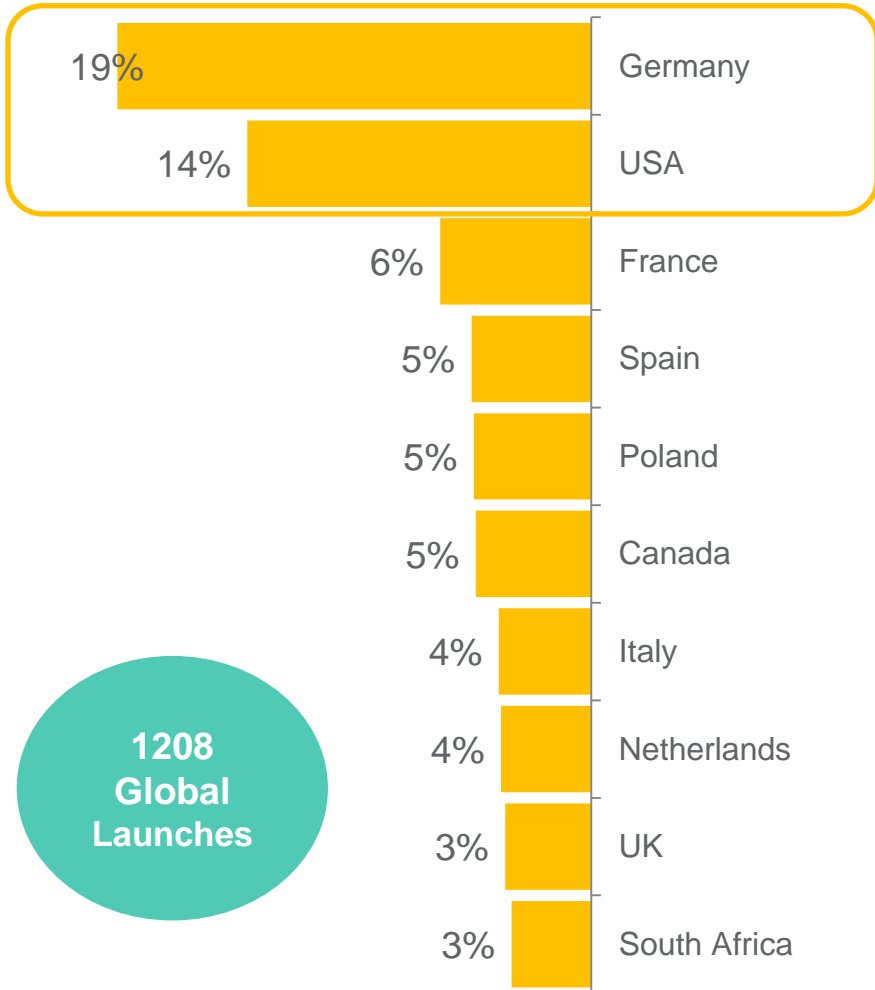


Celery SKUs

Country, Region & Categories

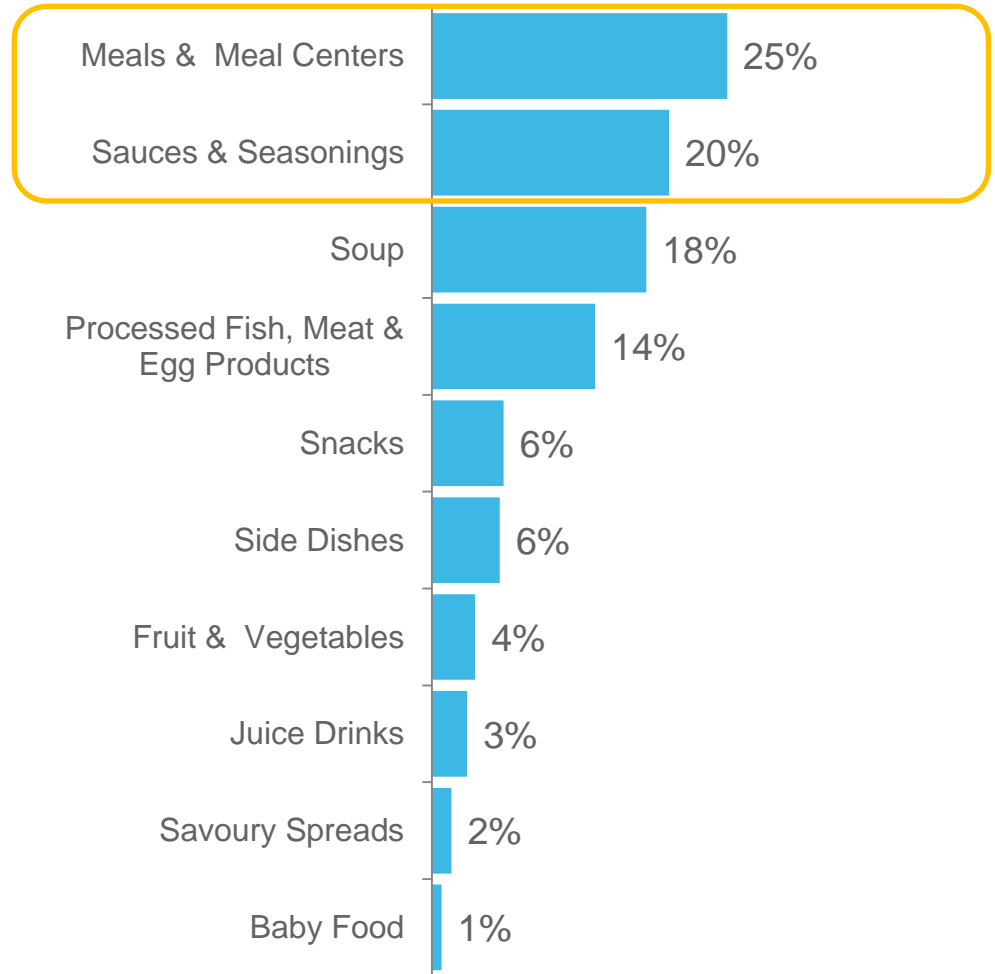
- Germany and USA remained the main countries for celery launches in the last three months.
- The majority of launches were in meals and sauces and seasoning categories, most likely as celery is used as a base ingredient in many products.

Top Launch Countries



**1208
Global
Launches**

Top Launch Categories



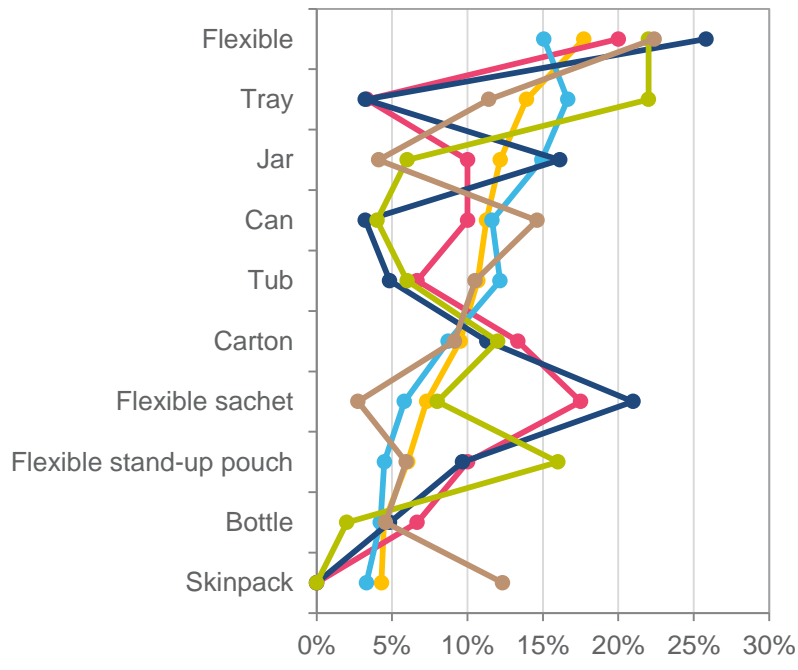


Celery SKUs

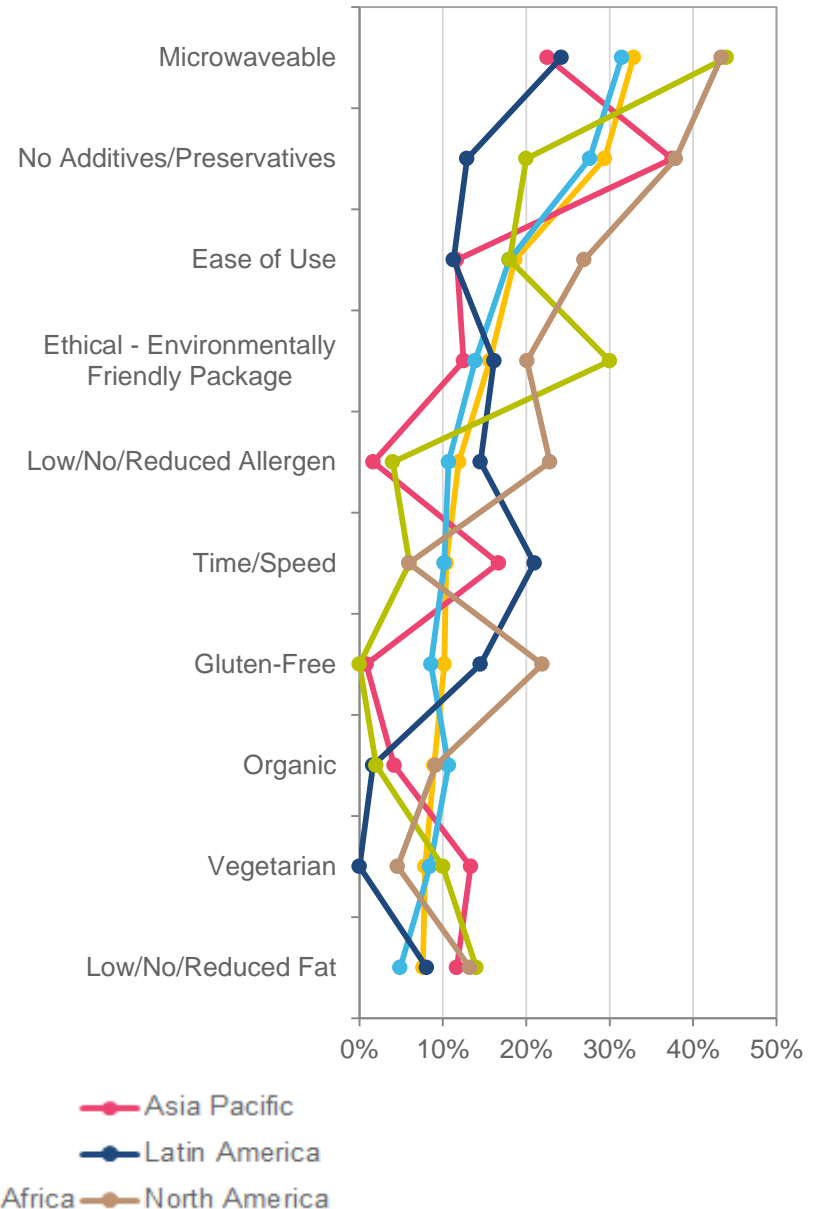
Top Claims & Pack Formats Used

- There was variability across regions in the type of packaging used for celery products. Overall, flexible remained the most common format used, followed by tray and jar.
- Convenience claims, microwavable and easy to use, were most commonly used on celery products. North America were more likely to utilise multiple claims compared with other regions.

Pack Formats Launched



Top Claims Launched





Innovative Celery Launches: L3M (February-April 2014)

Woolworths Food Sweet Potato & Asparagus Soup (South Africa)

Woolworths Food Sweet Potato & Asparagus Soup is recommended served hot with Caesar croutons and crispy lightly salted onions. The microwaveable product retails in a 600g pack that serves two.



Claims:
Ease of Use, Ethical - Environmentally Friendly Package, Microwaveable

A-One Huong Sen Vegetarian Instant Noodles (Vietnam)

A-One Huong Sen Mi Chay (Vegetarian Instant Noodles) have been repackaged in a newly designed look. This product retails in an 85g pack.



Claims:
Vegetarian, Time/Speed

Xox Naturell Veggies Snack (Finland)

Xox Naturell Kuivattu Kasvislastu (Veggies Snack) is now available. This product comprises carrot, celery and beetroot, all fried in sunflower oil and seasoned with sea salt. The product is free from colourings and flavour enhancers, and retails in a 50g pack.



Claims:
No Additives/Preservatives

Chef Select Brasserie Belgique Vol au Vent Filling (Belgium)

Chef Select Brasserie Belgique Vol-au-Vent (Vol au Vent Filling) is made according to a traditional Belgian recipe. This microwaveable product retails in a 1000g pack that serves three to four.



Claims:
Microwaveable

»»» Innovative Celery Launches: L3M (February-April 2014)

Penny Clear Vegetable Broth (Germany)

Penny Klare Gemüsebrühe (Clear Vegetable Broth) can be used for the preparation of soups, for seasoning and refining of vegetables, sauces and many more. This product retails in a 140g pack sufficient to make 7L of broth.



Claims:
No information available

Southern Belle Seafood Stuffed Crabs (USA)

Southern Belle Seafood Stuffed Crabs are now available. The product retails in a 12-oz. pack.



Claims:
No information available

Garant Vegetable Stock (Sweden)

Garant Grönsaker Fond (Vegetable Stock) is recommended for cooking soups, sauces or stews. This product retails in a 180ml pack.



Claims:
Ethical - Environmentally Friendly Package

Thiriet Les Cuisinés Thiriet Moussaka (France)

Thiriet Les Cuisinés Thiriet Moussaka (Moussaka) is made with sliced aubergines, French beef and lamb meat in a smooth béchamel sauce. The easy to prepare product can be microwaved in sixteen minutes or baked for fifty minutes. The product retails in an 850g recyclable pack that serves three to four portions.



Claims:
Ease of Use, Ethical - Environmentally Friendly Package, Microwaveable

➤➤➤ Innovative Celery Launches: L3M (February-April 2014)

Pineapple, Celery and Nopal Flavored Drinking Yogurt (Mexico)

Danone Activia Alimento Lácteo Fermentado con Piña, Apio y Nopal (Pineapple, Celery and Nopal Flavored Drinking Yogurt) has been repackaged in a newly designed 250g pack. The yogurt is made with ActiRegularis probiotic, which is said to help maintain a healthy digestive system.



Claims:
Digestive (Functional)

Knorr Doble Sabor Chicken Broth with Coriander (Mexico)

Knorr Doble Sabor Caldo de Pollo + Cilantro (Chicken Broth with Coriander) is new to the range. This broth can be used as a stock or seasoning, to prepare rice, and does not require the addition of salt to prepare. This product retails in an 88g pack containing 8 x stock cubes, enough to make 4L of stock.



Claims:
No information available

Fit & Easy Spring Crispy Snack with Horseradish Dip (Poland)

Fit & Easy Spring Chrupiaca Przekaska (Crispy Snack with Horseradish Dip) consists of fresh vegetables including carrot, celery and tomatoes and a horseradish dip. The product retails in a 270g pack.



Claims:
Ease of Use, Slimming

King's Crown Celery Hearts (Portugal)

King's Crown Corações de Aipo (Celery Hearts) are now available. The product retails in a 680g jar.



Claims:
No information available



Australian Celery Launches: L3M (February-April 2014)

Hansells All Natural Indian Dahl Hearty Soup Mix



Claims:
No Additives/Preservatives, All Natural Product, Low/No/Reduced Allergen, GMO-Free, High/Added Fiber, Ease of Use, Vegetarian

Ina Paarman's Kitchen Meat Spice



Claims:
Halal, No Additives/Preservatives, Vegetarian, Kosher

Parker's Juicery Organic Cleanse 1 Apple, Kale, Celery, Spinach, Parsley, Lemon Juice



Claims:
Ethical - Charity, Organic, Other (Functional), Ethical - Environmentally Friendly Package, Digestive (Functional)

John West Tuna & Rice Chilli & Tomato Meal



Claims:
All Natural Product, On-the-Go, Time/Speed, Microwaveable, Social Media, Ethical - Animal

You. Sips Bits Dips Green 4 Go Juice

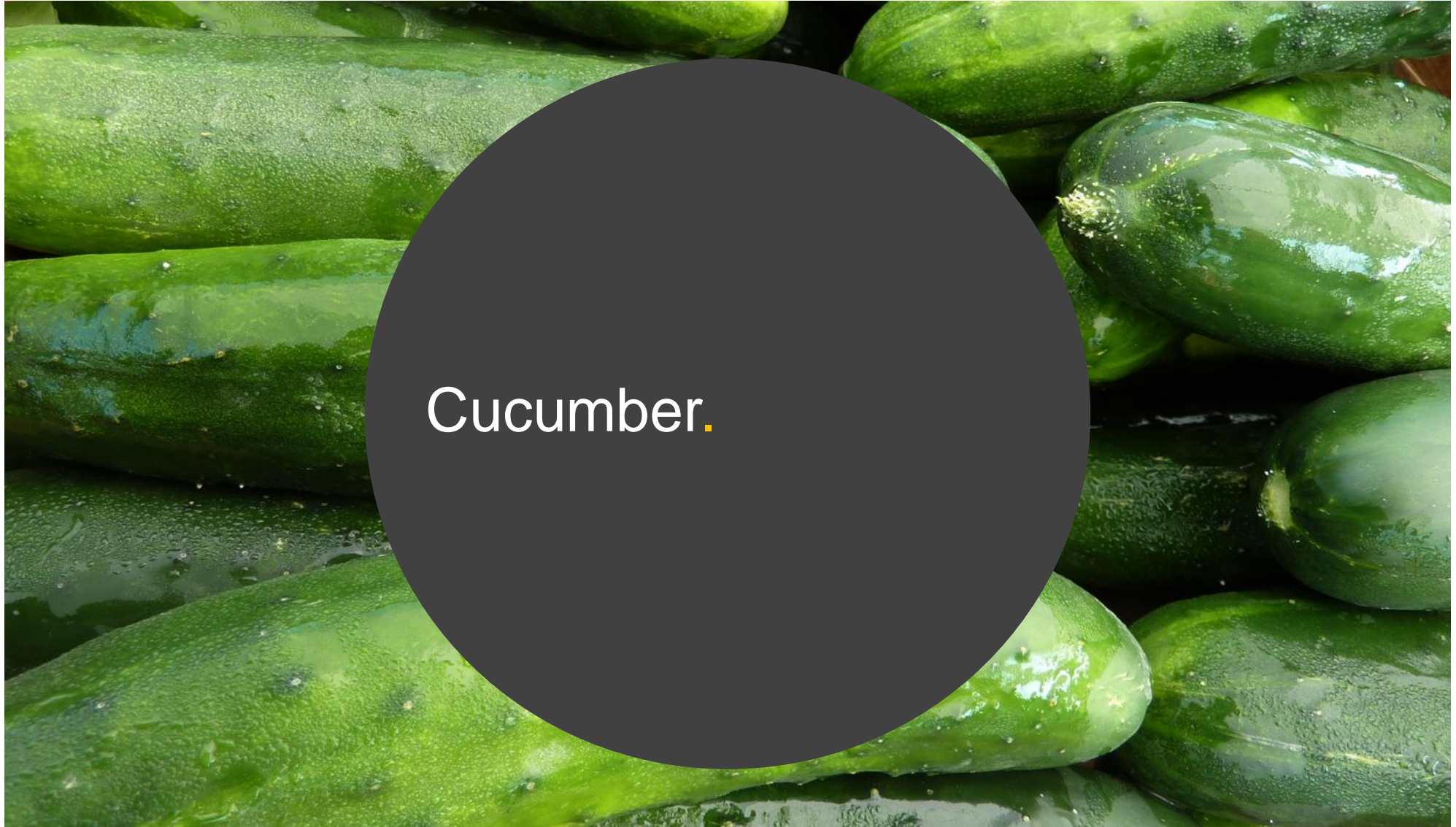


Claims:
No information available

You. Sips Bits Dips Celery, Carrot & Sundried Tomatoes



Claims:
Cobranded



Cucumber.



Purchase and Consumption Behaviour



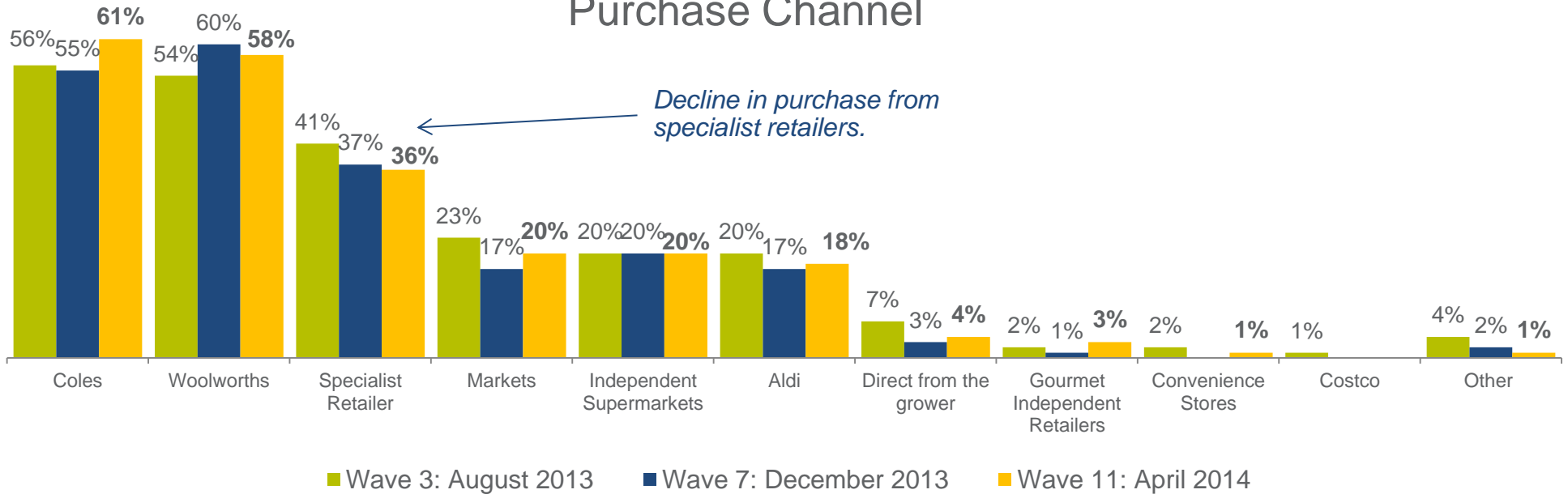
- ▲ 4.4 times, Wave 3
- ▲ 4.9 times, Wave 7



- ▼ 12.1 times, Wave 3
- ▲ 13.3 times, Wave 7

- ⇒ Purchase and consumption frequency was on trend with Wave 3, August 2013. On average, cucumber was consumed every 2-3 days.
- ⇒ Coles and Woolworths were the key purchase locations for cucumbers. Purchase channels were consistent across waves, however there has been a directional decrease in purchase from specialist retailers.

Purchase Channel



Q1. On average, how often do you purchase <commodity> ?
 Q2. On average, how often do you consume <commodity> ?
 Q5. From which of the following channels do you typically purchase <commodity> ?
 Sample Wave 3, N=503, Wave 7, N=352, Wave 11, N=301



Average Spend and Price Sensitivity



Average weight of purchase

The average consumer typically purchased 600g of Cucumber in April 2014, which was consistent with previous months.

- ▲ 700g, Wave 3
- ▲ 700g, Wave 7



Recalled last spend

The average recalled last spend was \$2.50. This was slightly lower than past waves.

- ▲ \$2.80, Wave 3
- ▲ \$2.80, Wave 7



Value for money

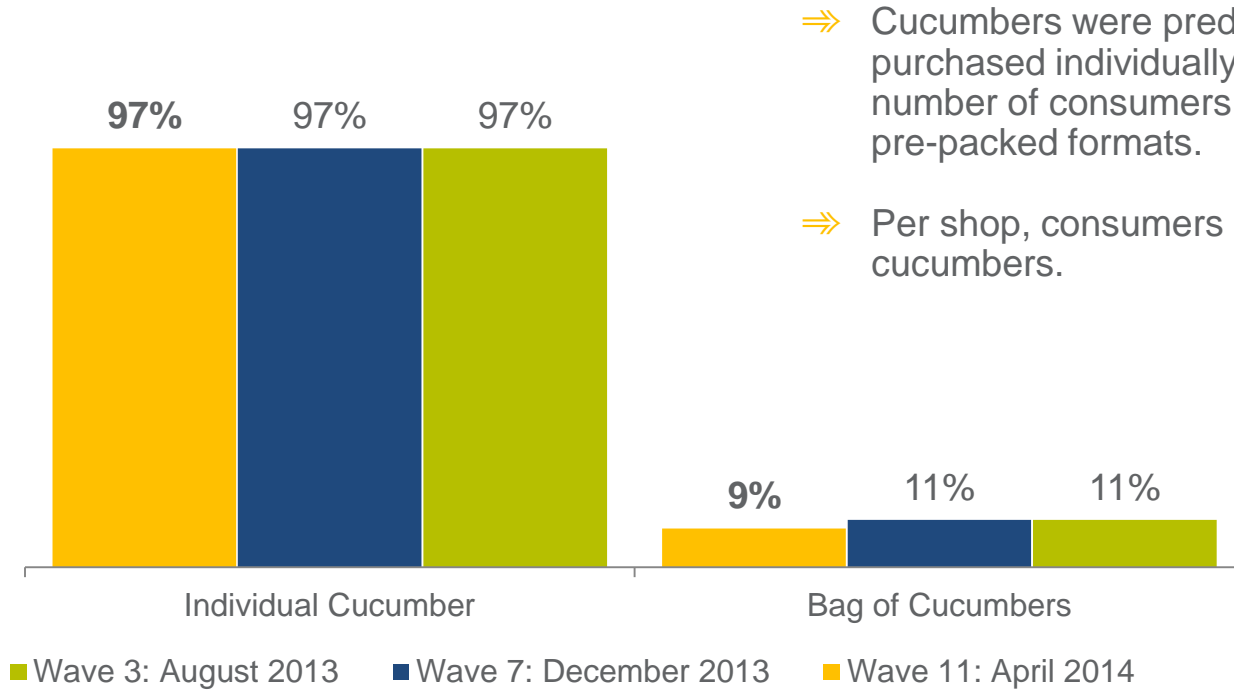
On average, consumers perceived Cucumber to be good value for money (6.2/10), which was in line with August and December last year.

- ▲ 6.3/10, Wave 3
- 6.2/10, Wave 7

Q3. How much <commodity> do you typically purchase when you shop for it?
 Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
 Q4. Please indicate how Poor to Good Value you think this product is? 0-10 scale
 Sample Wave 3, N=503, Wave 7, N=352, Wave 11, N=301



Pack Formats Purchased



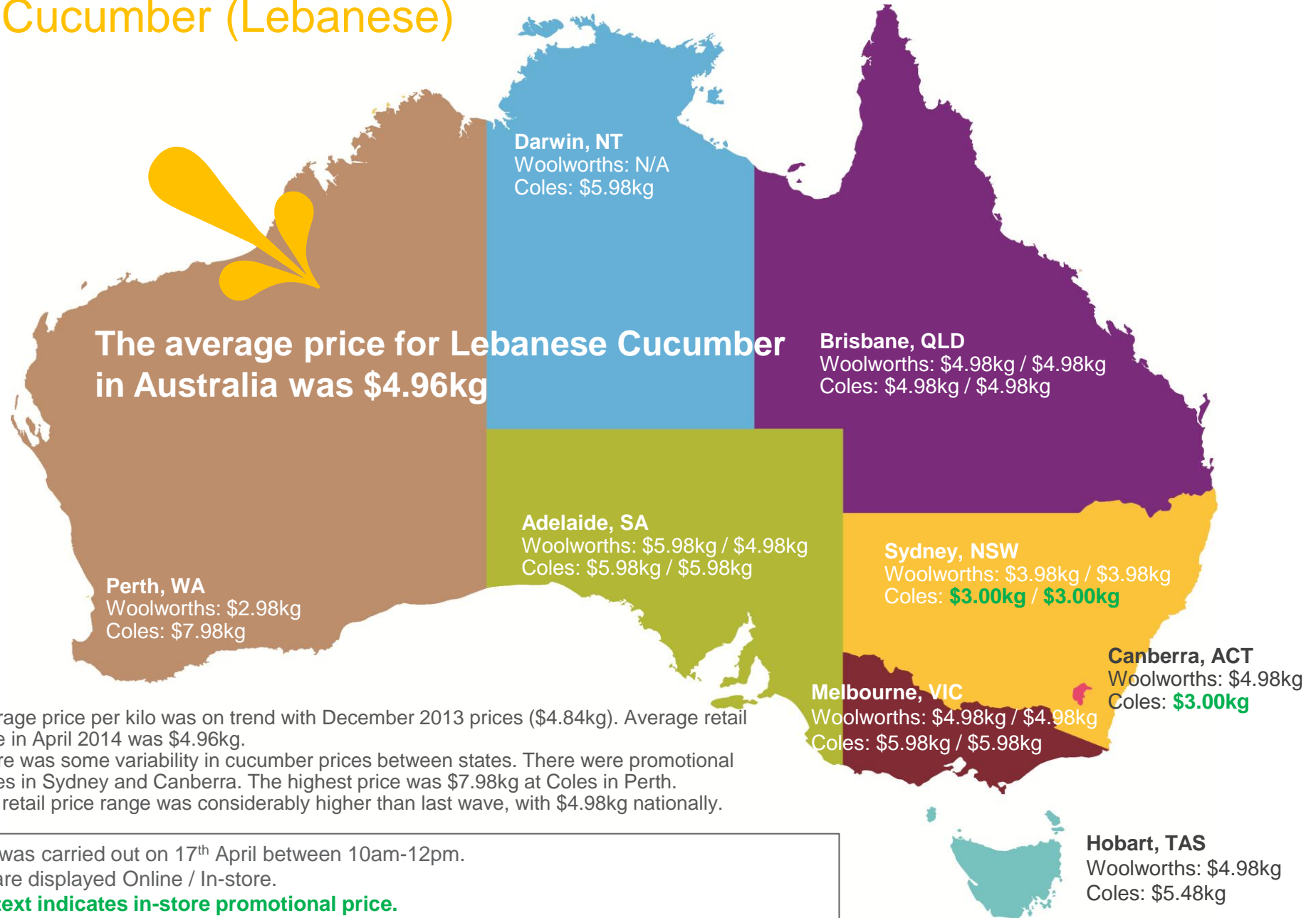
- ⇒ Cucumbers were predominately purchased individually, with only a small number of consumers purchasing in pre-packed formats.
- ⇒ Per shop, consumers purchased two cucumbers.

	Individual	Bag
Wave 3	2.6	2.4
Wave 7	2.3	2.5
Wave 11	2.2	2.5

Q3a. How much <commodity> does this typically equate to?
 Sample Wave 3, N=503, Wave 7, N=352, Wave 11, N=301

Online and In-store Commodity Prices

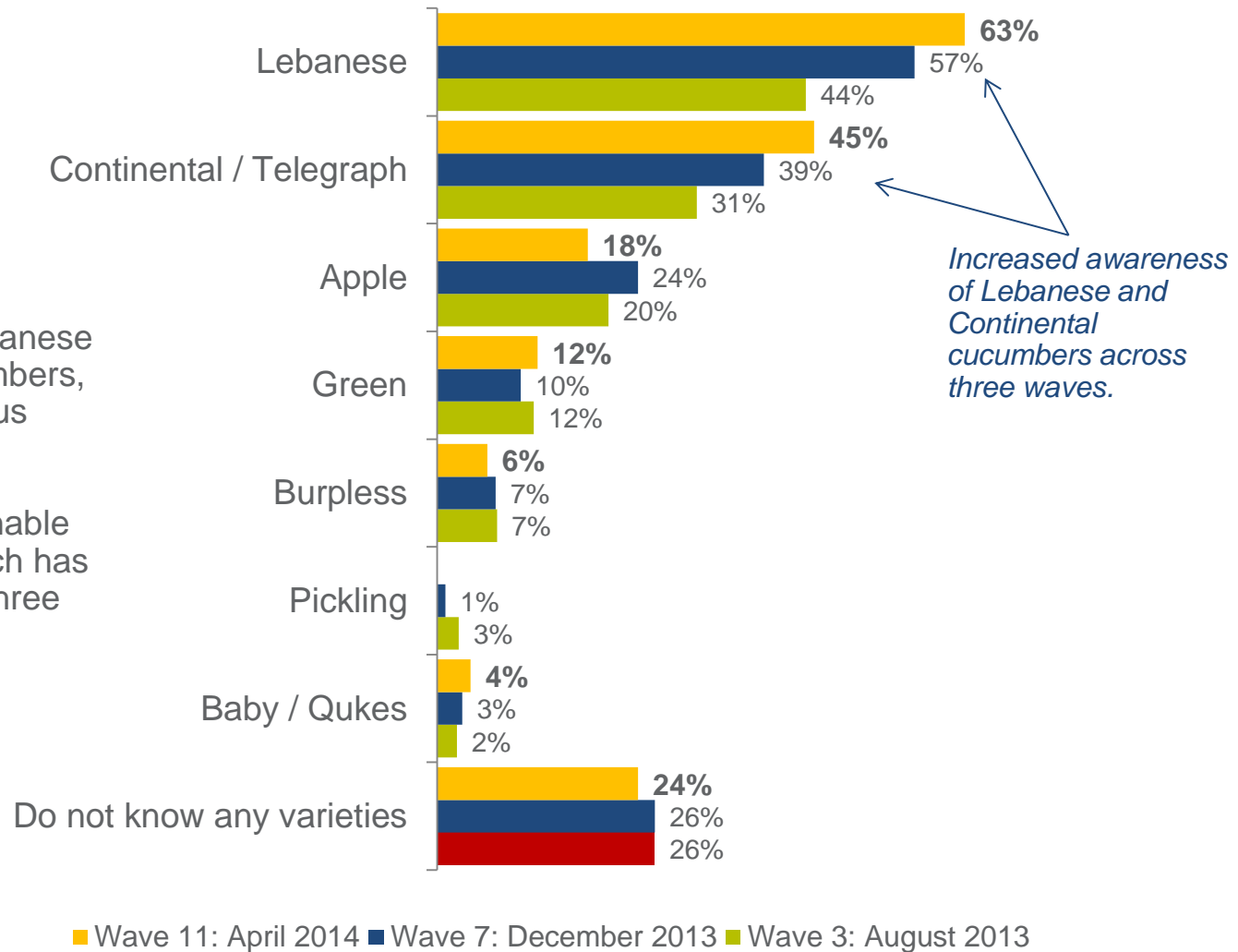
Cucumber (Lebanese)





Spontaneous Awareness

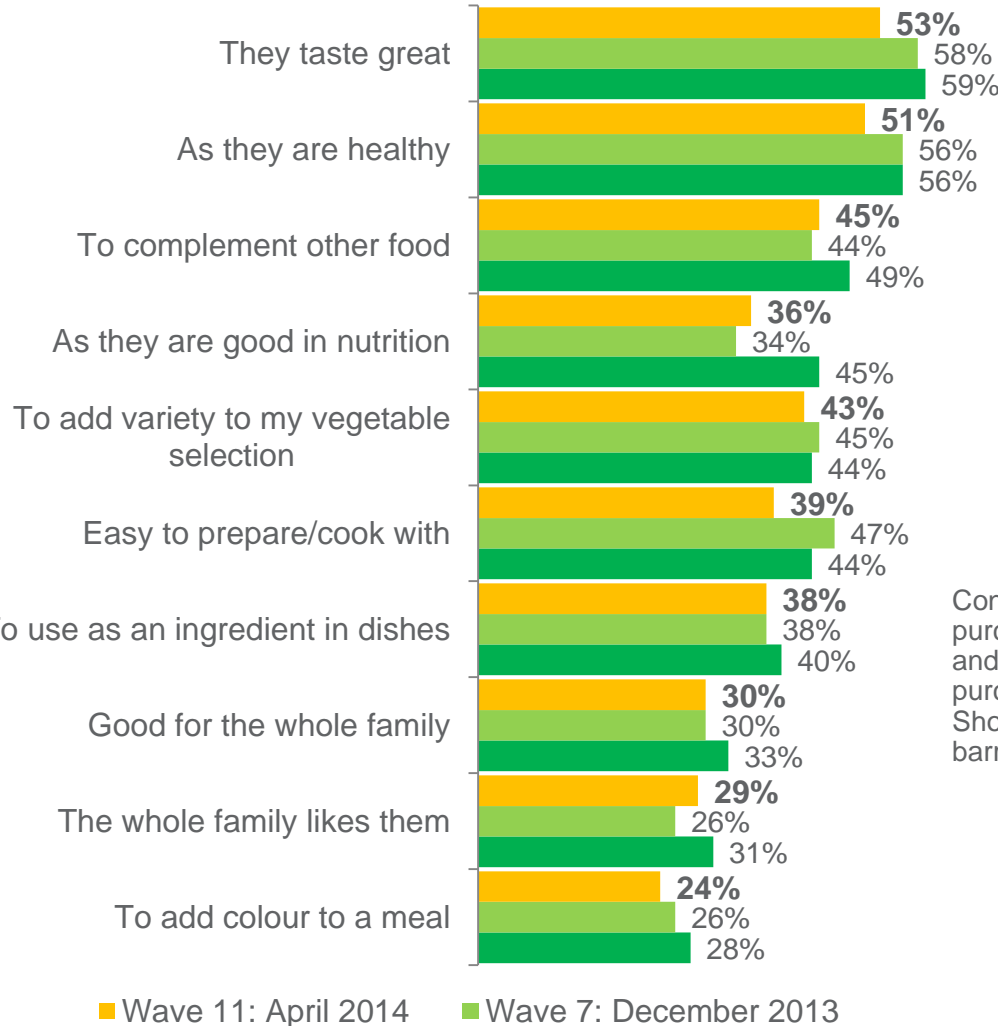
- ▶ There was a strong recall for Lebanese and Continental/Telegraph cucumbers, which had increased from previous waves.
- ▶ A quarter of respondents were unable to recall a type of cucumber, which has remained consistent across the three waves.



Triggers and Barriers to Purchase

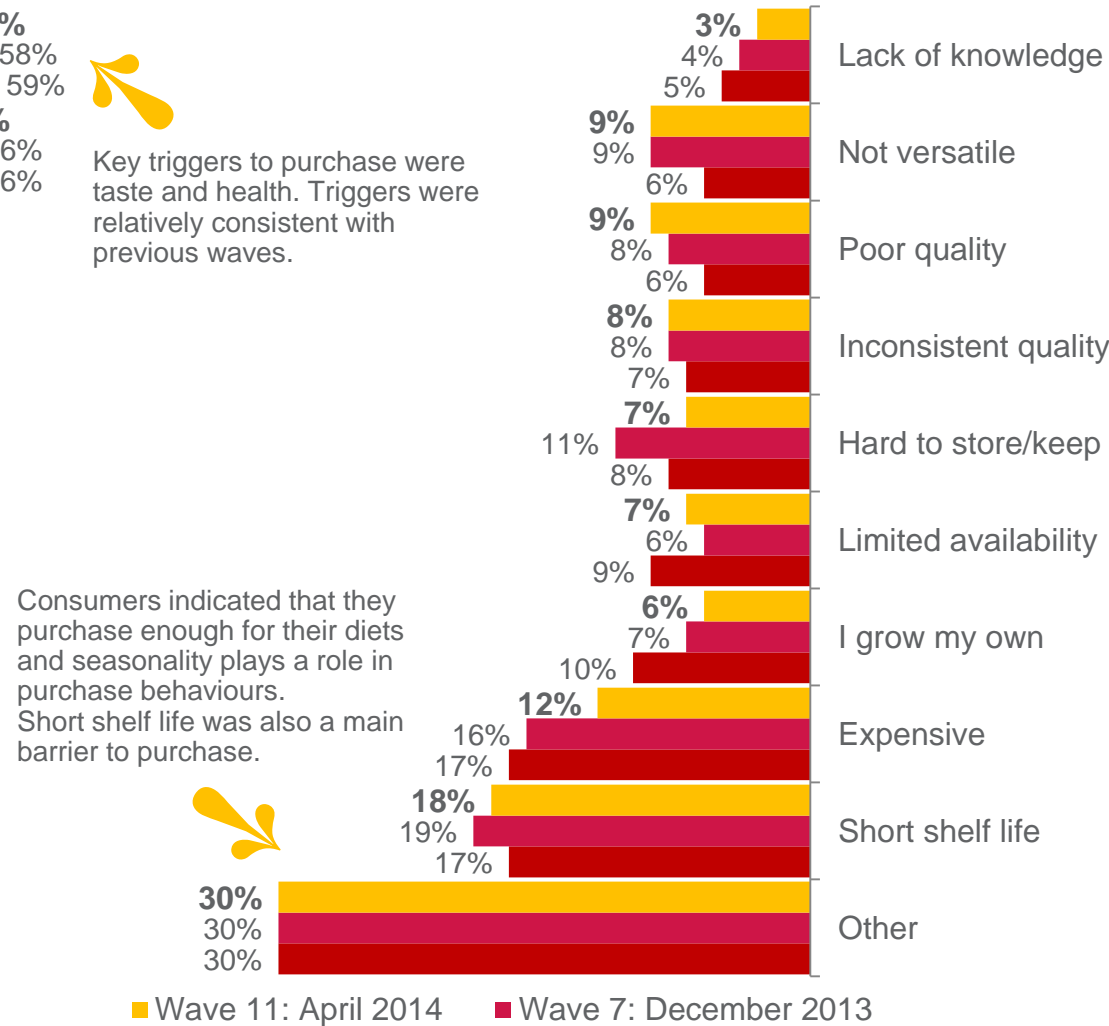


Triggers



Key triggers to purchase were taste and health. Triggers were relatively consistent with previous waves.

Barriers



Consumers indicated that they purchase enough for their diets and seasonality plays a role in purchase behaviours. Short shelf life was also a main barrier to purchase.

Sample Wave 3, N=503, Wave 7, N=352, Wave 11, N=301
 Q7. Which of the following reasons best describes why you purchase <commodity> ?
 Q8. Which reason best describes why you don't buy <commodity> more often?

⇒⇒⇒ Cooking Preferences & Occasions



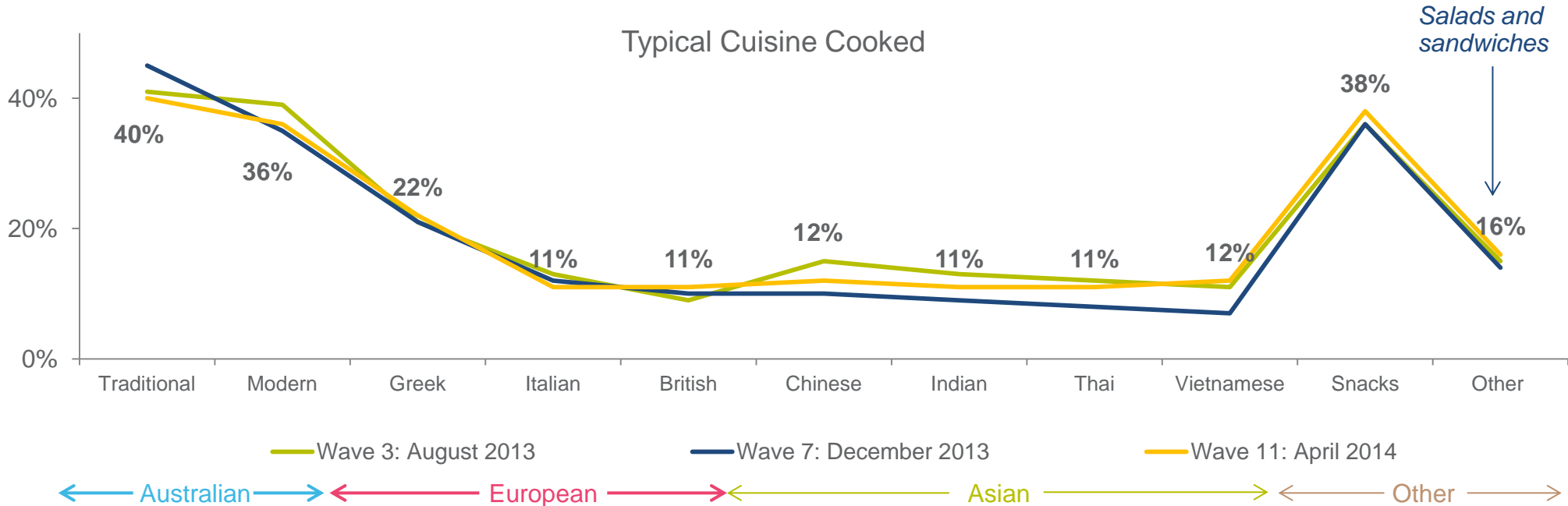
⇒⇒ Australian cuisine and snacks were the main cooking preferences for cucumber. Cooking repertoire was consistent occasion waves.

⇒⇒ The main consumption occasions were weekdays, lunch and dinner.



Wave 11 Top 5 Consumption Occasions

	Wave 11	Wave 7	Wave 3
Weekday lunch	46%	▼	▼
Weekday dinner	38%	▲	—
Quick meals	37%	▼	▼
Everyday meals	37%	▼	▼
Weekend lunch	33%	▲	—



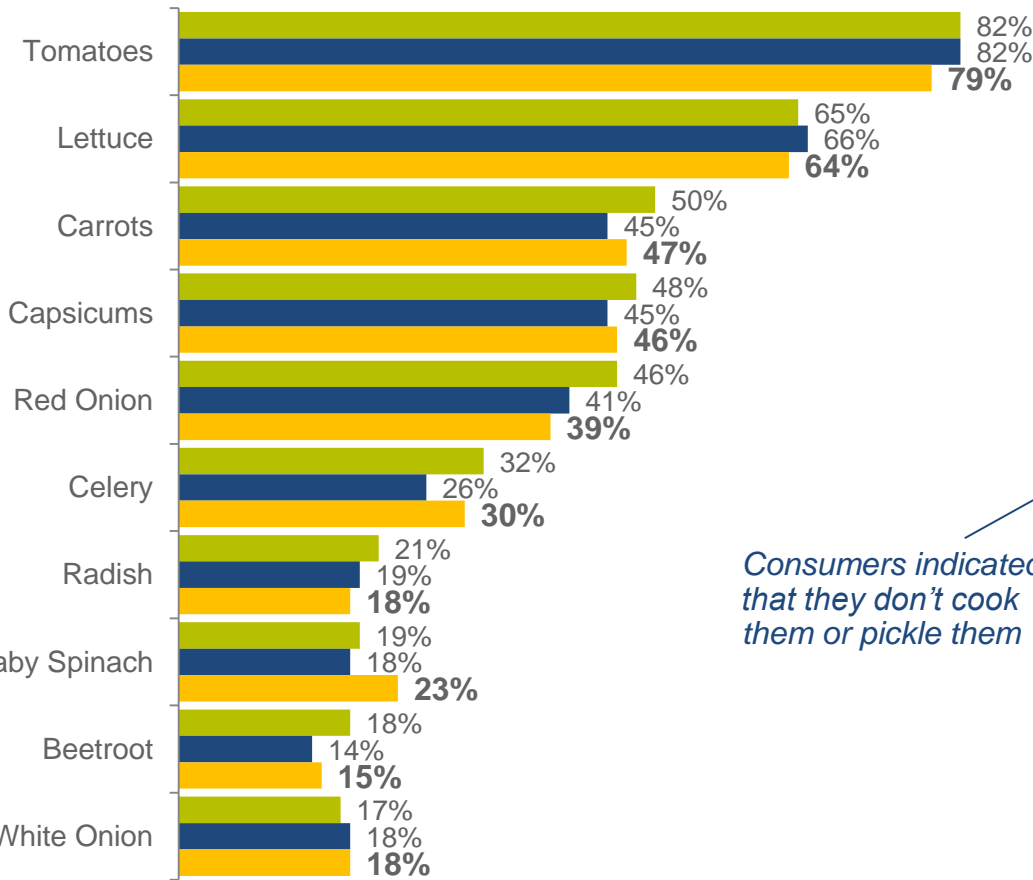
Sample Wave 3, N=503, Wave 7, N=352, Wave 11, N=301
 Q10. What cuisines do you cook/consume that use <commodity> ?
 Q11. Which of the following occasions do you typically consume/use <commodity> ?



Cooking Preferences



Top 10 Accompanying Vegetables



Consumers indicated that they don't cook them or pickle them

- ⇒ Cucumber was eaten raw for the majority of consumption occasions.
- ⇒ More often than not, cucumber was served with tomatoes and lettuce, typical salad ingredients.

Top 10 Cooking Styles

	Wave 3	Wave 7	Wave 11
Raw	80%	84%	79%
Other	15%	12%	18%
Stir frying	13%	9%	8%
Steaming	5%	3%	3%
Soup	5%	2%	5%
Blend	3%	3%	1%
Microwave	2%	2%	1%
Roasting	2%	2%	2%
Grilling	2%	2%	2%
Baking	2%	2%	2%

■ Wave 3: August 2013 ■ Wave 7: December 2013 ■ Wave 11: April 2014

Sample Wave 3, N=503, Wave 7, N=352, Wave 11, N=301

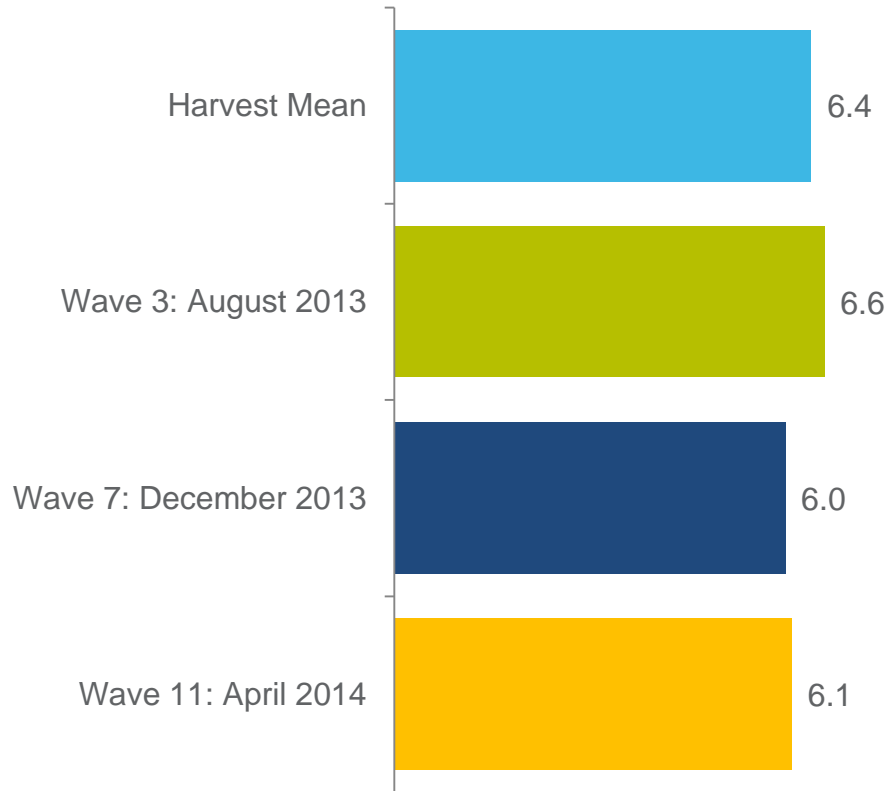
Q9. How do you typically cook <commodity> ?

Q10a. And when are you serving <commodity> which of the following do you also serve together with this?

»»» Importance of Provenance



⇒ Although lower than the Harvest mean, importance of cucumber provenance was in line with December last year.



Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 3, N=503, Wave 7, N=352, Wave 11, N=301



Freshness and Longevity

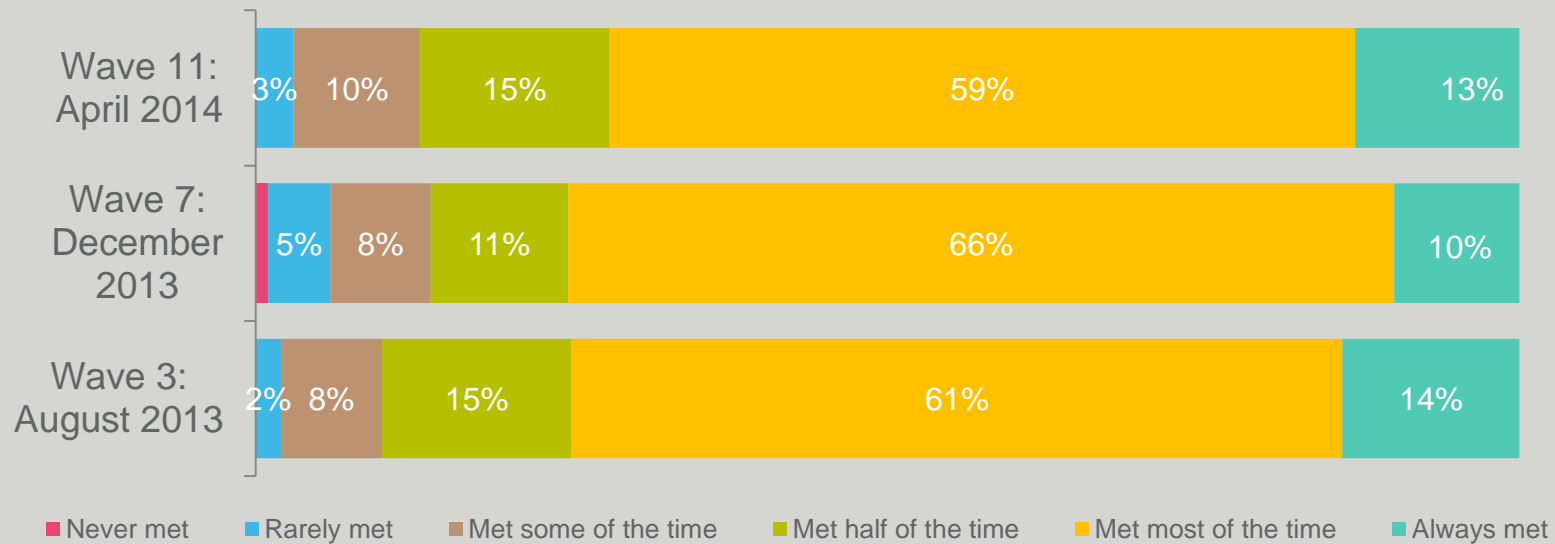


Expected to stay fresh for 7.7 days

- ⇒ Cucumber was expected to stay fresh for just over a week once purchased. This was in line with Wave 3 and 7.
- ⇒ Expectations of freshness were generally met and on trend. This may indicate that consistency of freshness across the year.

- ▼ 7.5 days, Wave 3
- 7.7 days, Wave 7

Expectations Met



Sample Wave 3, N=503, Wave 7, N=352, Wave 11, N=301
 Q12. How long do you expect <commodity> to stay fresh for, once you have purchased it?
 Q13. How often is this length of freshness met when you buy <commodity> ?

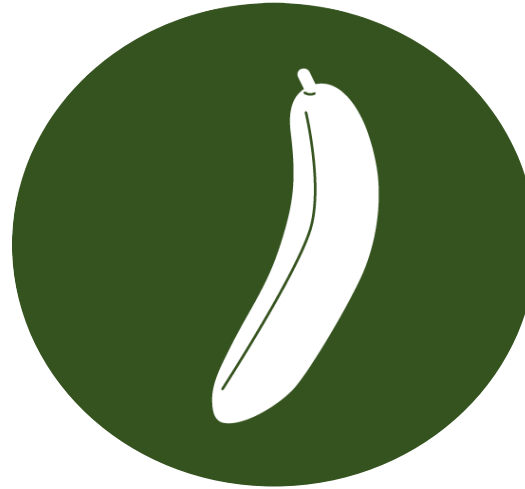


Trends: Cucumber

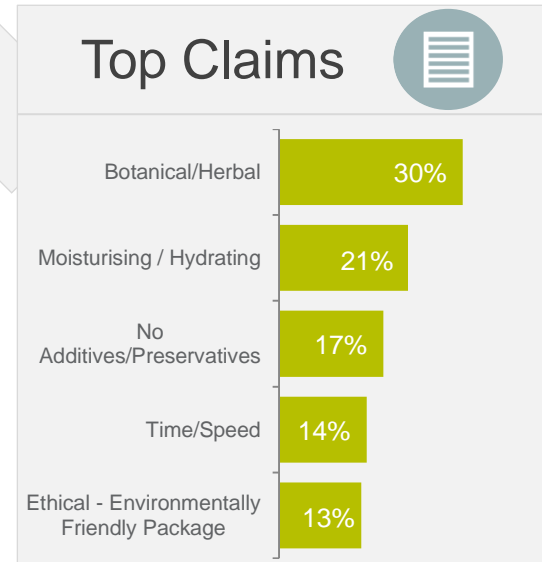
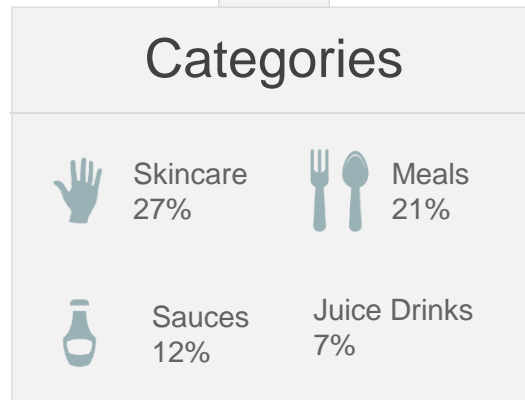
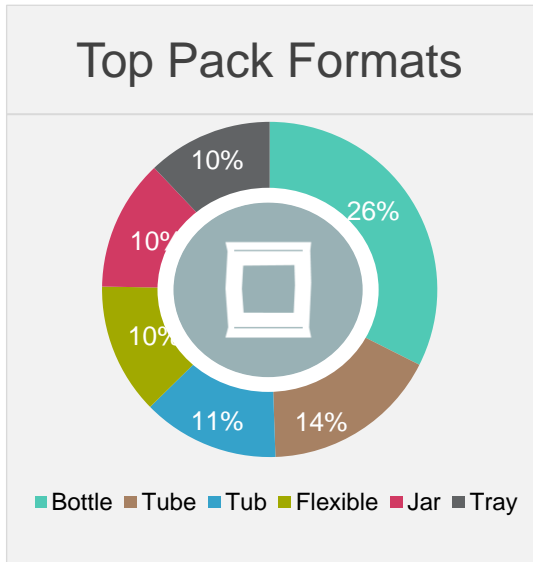
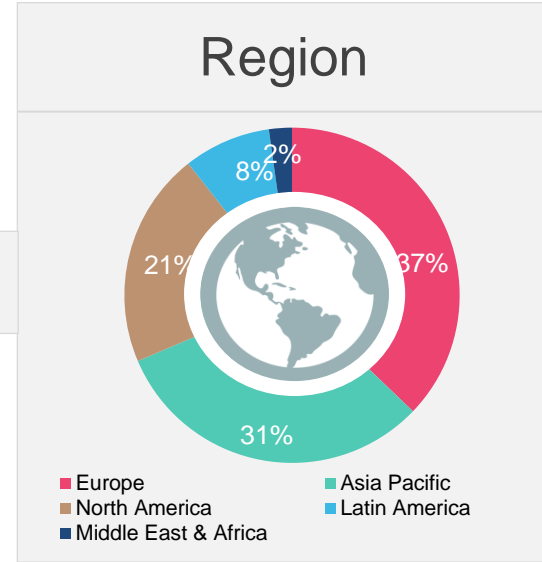
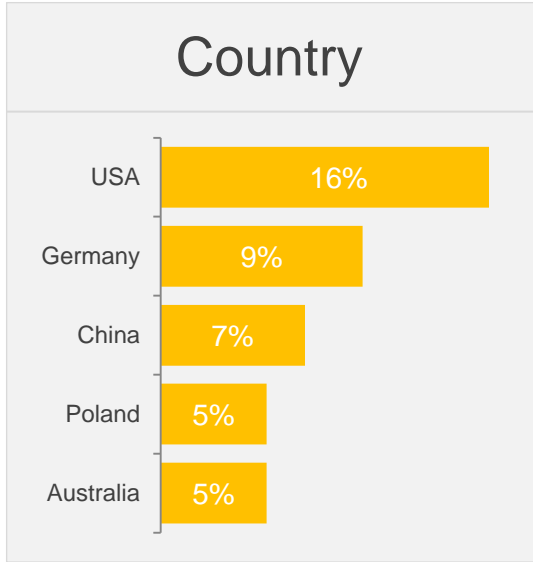
Cucumber Global NPDs

February – April 2014

226 products containing cucumber were launched over the past three months. The majority of launches occurred in Europe & Asia Pacific. Common packaging used were bottles and tube formats.



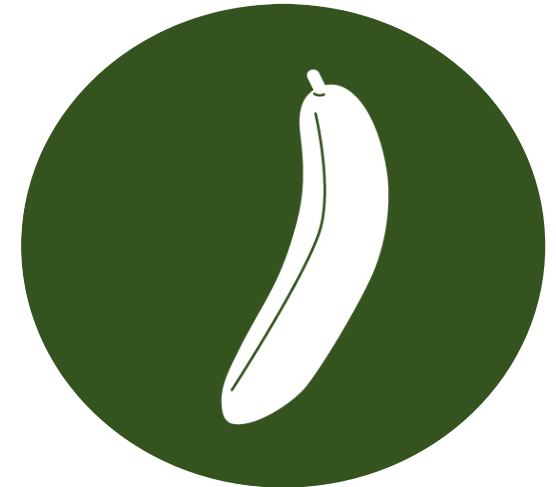
226 Global Launches





Cucumber Product Launches: Last 3 Months (June-August 2013) Summary

- The number of cucumber products launched was 226, which was slightly higher than October to December last year.
- Consistent with previous trends, five cucumber products were launched in Australia in the last 3 months.
- Europe (37%) and Asia Pacific (31%) had the greatest number of launches over the last three months. However, USA (16%) was the country with the highest number of cucumber products.
- Bottle (26%) and Tub (14%) remained the most common packaging formats used for cucumber products, consistent across waves.
- Top category launches were skincare (27%) and meals and meal centres (21%).
- Top claims used for products were botanical/herbal (30%) and moisturising/hydrating (21%).
- The most innovative launch was Turek Naturek Puszysty Curd Cheese with Cucumber from Poland (examples of these can be found in the following pages).



Source: Mintel (2014)

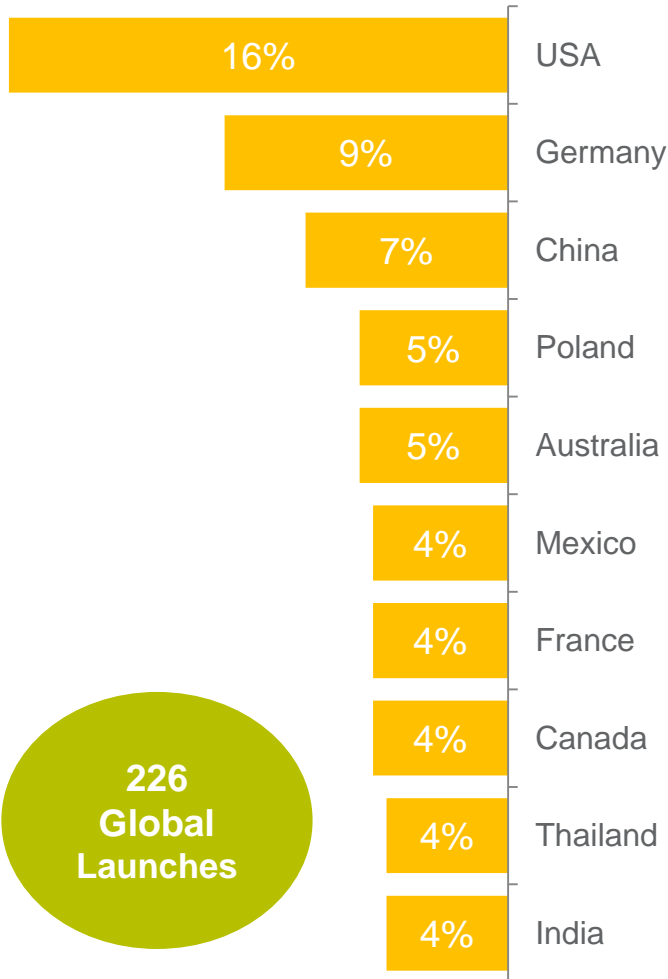


Cucumber SKUs

Country, Region & Categories

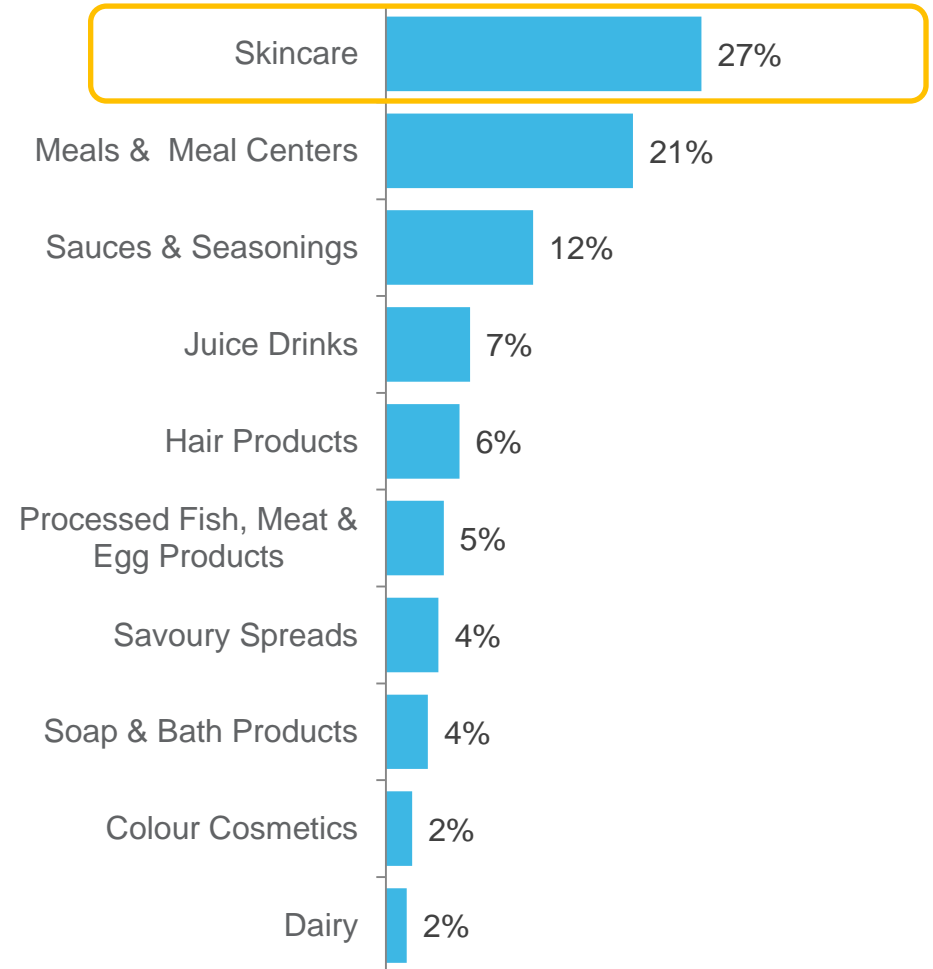
- USA remained the most common country for cucumber product launches in the last three months.
- Consistent with previous trends, skincare has over a quarter of product launches, followed by meals and sauces and seasonings.

Top Launch Countries



226
Global
Launches

Top Launch Categories



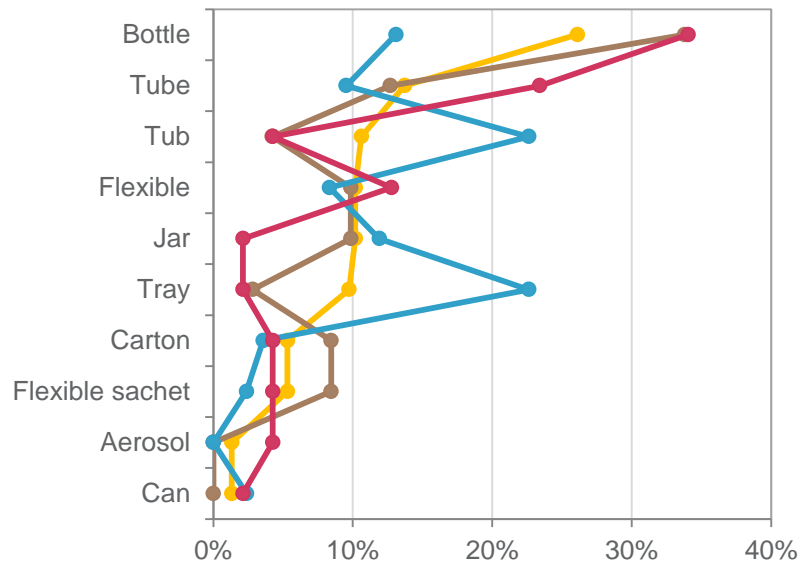


Cucumber SKUs

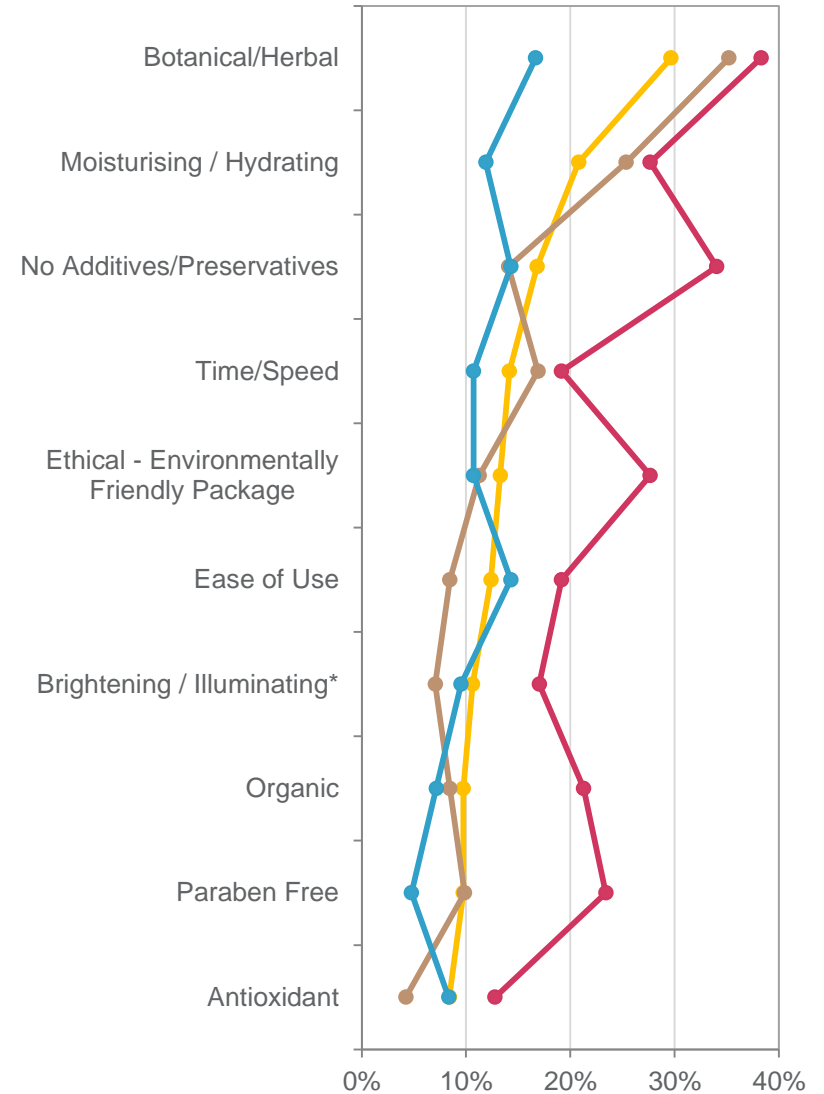
Top Claims & Pack Formats Used

- Bottles and tubes were the most used pack format over the last three months, especially in North America.
- Top claims used on products were botanical/herbal and moisturising/hydrating, in line with the skin care products.

Top Pack Formats Launched



Top Claims Launched



● Global ● Asia Pacific
● Europe ● North America

Number of Global Cucumber NPDs for the L3M N=226
 Only regions with n >30 are displayed

»»» Innovative Cucumber Launches: L3M (February-April 2014)

Dominik Pickled Cucumber Puree (Poland)

Dominik Przecier Ogorkowy (Pickled Cucumber Puree) is designed for soup preparation. The product comes from the Polish region of Warmia and Mazury, is ready to consume and retails in a 550g pack.



Claims:
Ease of Use

CJ CheilJedang Hasunjung Uncut Cucumber Pickle (South Korea)

CJ CheilJedang Hasunjung Uncut Cucumber Pickle is made of 100% fresh Korean cucumber and seasoned with solar salt at natural temperature. This product retails in a 300g pack.



Claims:
No Additives/Preservatives

First Choice Deep Sea Sea Cucumber (China)

First Choice Shen Hai Da Wu Shen (Deep Sea Sea Cucumber) has been repackaged and is now available in a newly designed 500g pack. This product is said to be pure, nutritious and delicious.



Claims:
No information available

Murano Bar Soap (Mexico)

Murano Jabón con Pepino (Bar Soap with Cucumber) is formulated with cucumber extract. The product retails in a 150g pack.



Source: Mintel (2014)

Claims:
Botanical/Herbal

➤➤➤ Innovative Cucumber Launches: L3M (February-April 2014)

Veggie Mama Garden Pops Frozen Veggie and Fruit Bars (USA)

Veggie Mama Garden Pops Frozen Veggie and Fruit Bars are all natural, dairy free, packed with essential nutrients and are made with real vegetables and fruits. The variety pack contains Carrot Berry, Citrus Cucumber and Sweet Potato Pie flavors. It is sweetened with agave nectar, which has a lower glycemic index than other sweeteners.



Claims:
All Natural Product, Low/No/Reduced Allergen, Low/No/Reduced Calorie, On-the-Go, Low/No/Reduced Glycemic, Ease of Use

Dr. Oetker Fun Foods Classic Cucumber & Carrot Sandwich Spread (India)

It is said to make tasty, creamy and easy sandwiches. Its mild flavour enables to be creative with lettuce, cheese, ham, fish or pickles. The zero trans fat product is retailed in a 275g pack.



Claims:
Low/No/Reduced Transfat

Pure Genius Sparkling Water Beverage with a Splash of Cucumber (Canada)

Pure Genius Sparkling Water Beverage with a Splash of Cucumber is now available. This product retails in a recyclable 473ml can.



Claims:
Ethical - Environmentally Friendly Package

Turek Naturek Puszysty Curd Cheese with Cucumber (Poland)

Turek Naturek Puszysty Ser Twarogowy z Ogorkiem (Curd Cheese with Cucumber) has been relaunched under a new brand name. The product is made with 100% natural ingredients, and retails in a new 140g pack.



Claims:
All Natural Product

➤➤➤ Innovative Cucumber Launches: L3M (February-April 2014)

Dove Go Fresh Cucumber & Green Tea Nourishment Body Lotion (Philippines)

Dove Go Fresh Cucumber & Green Tea Nourishment Body Lotion has been relaunched featuring a new brand and product name (previously Dove Go Fresh Fresh Touch Cucumber & Green Tea Beauty Body Lotion), with a newly designed 250ml pack and a new formula with a DeepCare Complex.



Claims:
Botanical/Herbal, Dermatologically Tested, Time/Speed, Long-Lasting*, Moisturising / Hydrating

Life Juice Oh My Greens 100% Cold Pressed Raw Juice (USA)

Life Juice Oh My Greens 100% Cold Pressed Raw Juice is now available. This product is made with premium ingredients including spinach, kale, parsley, cucumber, celery, apple, ginger and lemon, and has gone through a cutting-edge heatless, high-pressure process for improved food safety and extended shelf life.



Claims:
No Additives/Preservatives, All Natural Product, GMO-Free, Brain & Nervous System (Functional), Other (Functional), Immune System (Functional), Antioxidant, Premium, Cardiovascular (Functional), Digestive (Functional)

Cucumber, Lemon and Chilli Flavored Green Tea Mix (Mexico)

Nature's Factory Polvo para Preparar Bebida de Té Verde sabor Pepino, Limón y Chile (Cucumber, Lemon and Chilli Flavored Green Tea Mix) is made using La Guerrera chilli. This mix contains natural antioxidants from tea, is very low in sodium, and low in calories. The special edition product retails in a 20g pack that yields 2 litres.



Claims:
Cobranded, Low/No/Reduced Sodium, Antioxidant, Limited Edition, Low/No/Reduced Calorie

Dai Dong Thuan Dried Vegetable Mix (Vietnam)

Dai Dong Thuan Dua Mon Kho Hon Hop (Dried Vegetable Mix) is now available. This product retails in a 200g pack.



Claims:
No information available



Australian Cucumber Launches: L3M (February-April 2014)

Revlon Age Defying Targeted Dark Spot Concealer Treatment



Claims:
Botanical/Herbal, Anti-Ageing, Vitamin/Mineral Fortified, Time/Speed, Whitening

Nudie with Veggies Tomato, Apple, Carrot, Lemon, Beetroot, Cucumber & a Pinch of Salt



Claims:
No Additives/Preservatives, Social Media, Ethical - Environmentally Friendly Package, Low/No/Reduced Sugar

Parker's Juicery Organic Watermelon, Cucumber and Basil Juice



Claims:
Ethical - Charity, Organic, Other (Functional), Ethical - Environmentally Friendly Package, Digestive (Functional)

Sukin Derma Sukin Daily Gentle Wash



Claims:
No Additives/Preservatives, For Sensitive Skin, Sulphate/Sulfate Free, Paraben Free, Botanical/Herbal, Fragrance Free, Ethical - Animal, Dermatologically Tested, No Animal Ingredients, Vegan, Carbon Neutral, Mineral Oil/Petroleum Free

Burt's Bees Facial Cleansing Towelettes



Claims:
Paraben Free, Cleansing*, Botanical/Herbal, Ophthalmologically Tested, Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Ethical - Animal, Ease of Use, Dermatologically Tested, Time/Speed, Mattifying*, Toning*

A close-up photograph of several zucchinis, showing their characteristic bumpy green skin. A large, dark grey circle is superimposed over the center of the image, containing the text 'Zucchini.' in white.

Zucchini.

Purchase and Consumption Behaviour



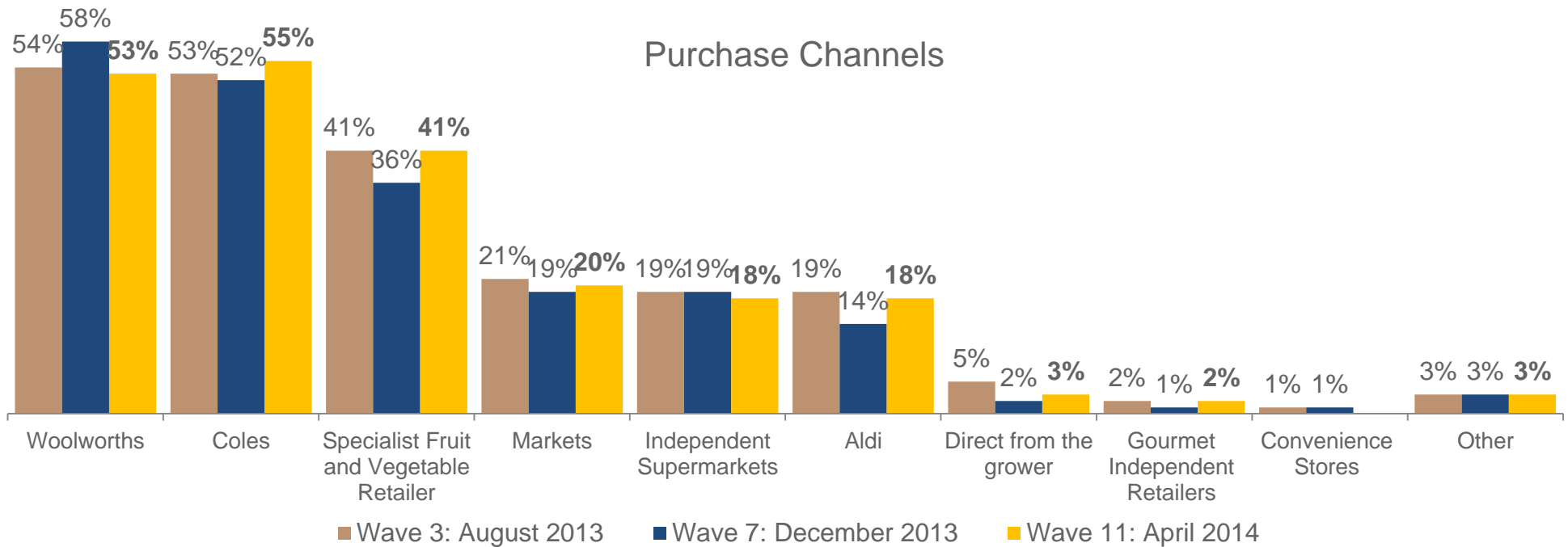
Average Purchase
3.2 times per month

- ▲ 3.8 times, Wave 3
- ▲ 3.4 times, Wave 7

Average Consumption
6.4 times per month

- ▲ 7.3 times, Wave 3
- ▲ 6.8 times, Wave 7

- ⇒ Purchase and consumption frequency were comparable to previous months, however directionally lower.
- ⇒ Buying behaviour was consistent across three waves, with Coles and Woolworths the main purchase locations. A considerable number of consumers also purchase from specialist retailers.



Q1. On average, how often do you purchase <commodity>?
 Q2. On average, how often do you consume <commodity>?
 Q5. From which of the following channels do you typically purchase <commodity>?
 Sample Wave 3 N=502, Wave 7, N=329, Wave 11 N=302



Average Spend and Price Sensitivity



Average weight of purchase

The average consumer typically purchased 700g of Zucchini per shop. This was consistent with previous months.

700g, Wave 3

600g, Wave 7



Recalled last spend

The average recalled last spend was \$2.80, which was on trend with August and December purchase last year.

\$2.80, Wave 3

\$2.70, Wave 7



Value for money

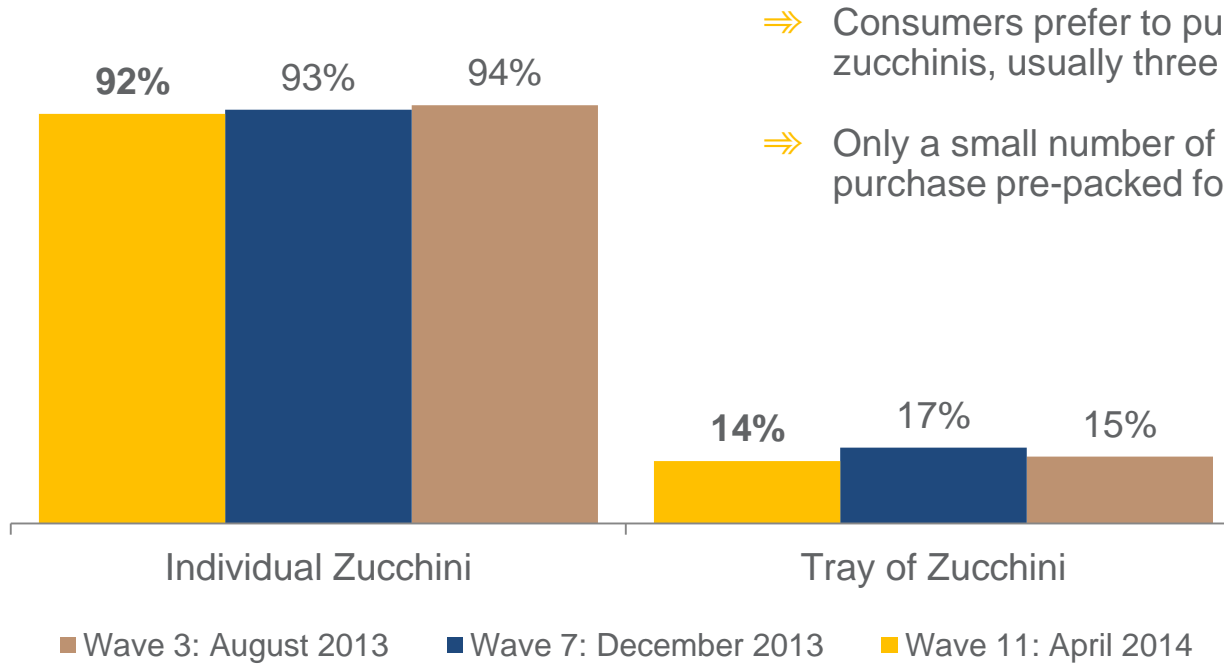
On average, consumers perceived Zucchini to be good value for money (6.2/10), which was comparable to previous waves.

6.4/10, Wave 3

6.0/10, Wave 7

Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is?
Sample Wave 3 N=502, Wave 7, N=329, Wave 11 N=302

⇒⇒⇒ Pack Formats Purchased

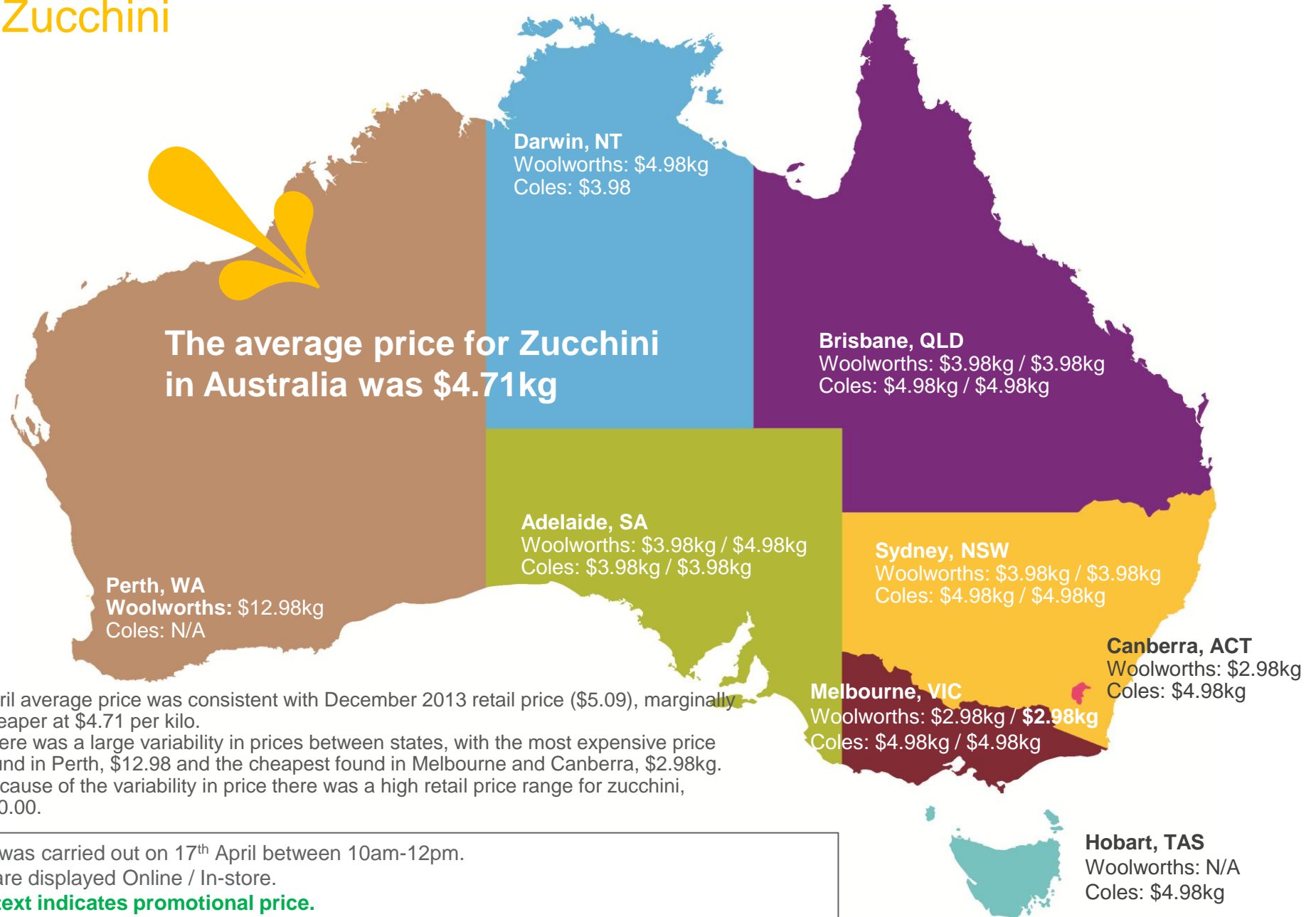


	Individual	Tray
Wave 3	3.3	1.9
Wave 7	2.9	1.9
Wave 11	3.0	1.9

Q3a. How much <commodity> does this typically equate to?
 Sample Wave 3 N=502, Wave 7, N=329, Wave 11 N=302

Online and In-store Commodity Prices

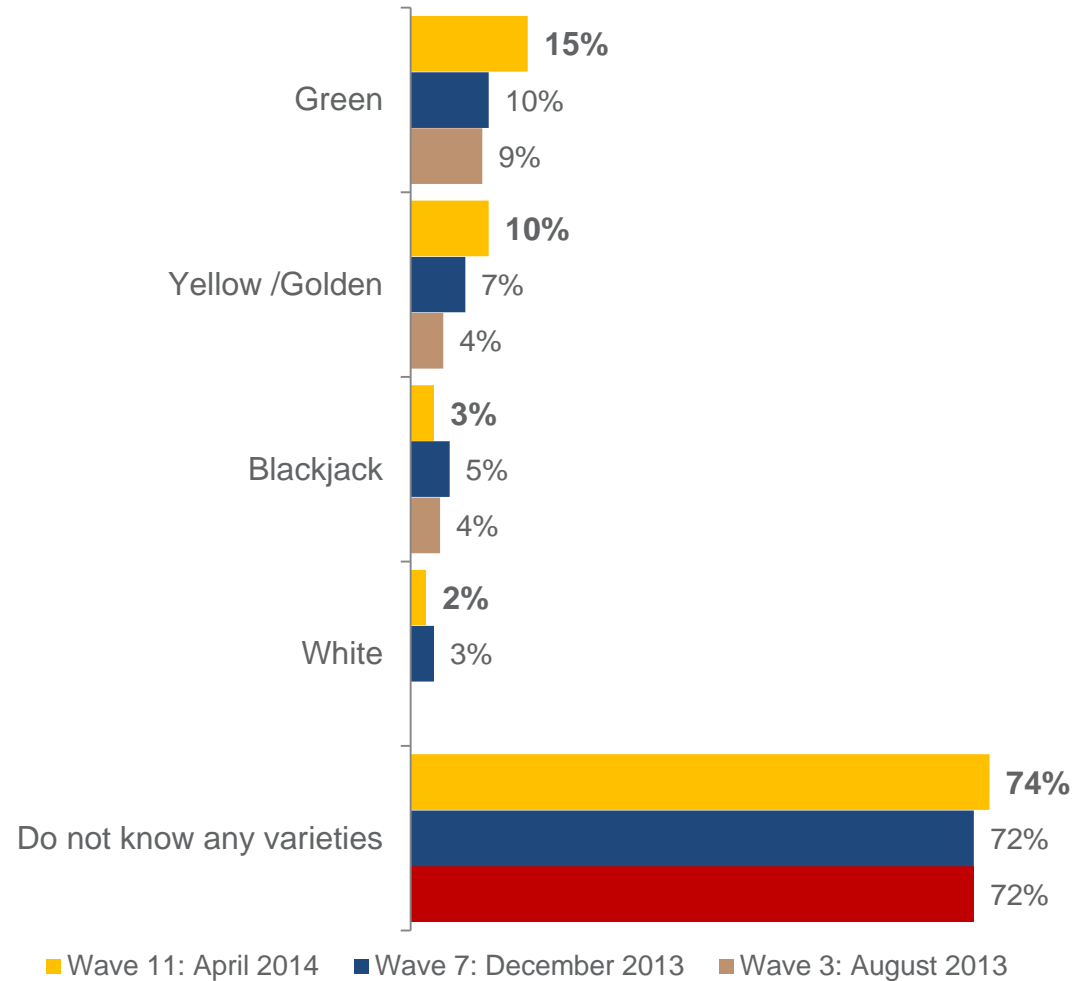
Zucchini





Spontaneous Awareness

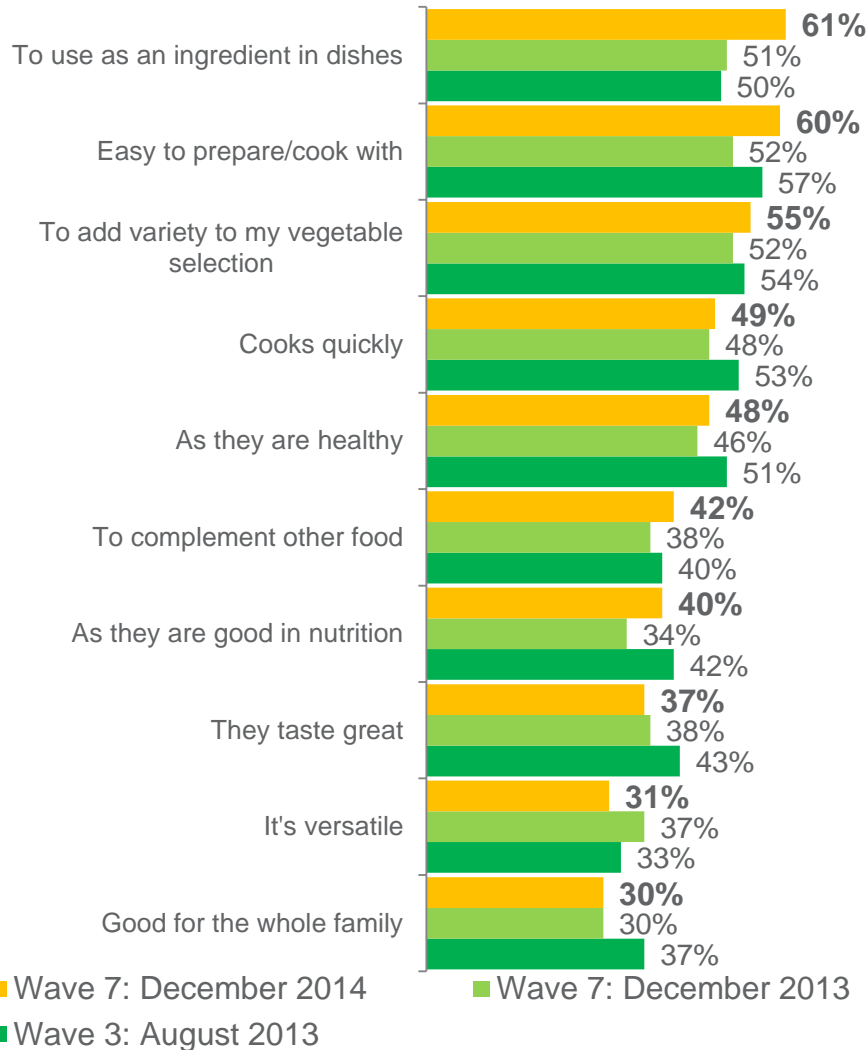
- ▶ Overall, awareness of zucchinis remained very low.
- ▶ Consumers who recalled types of zucchinis did so mainly by colour, with green the highest awareness.



Triggers & Barriers to Purchase



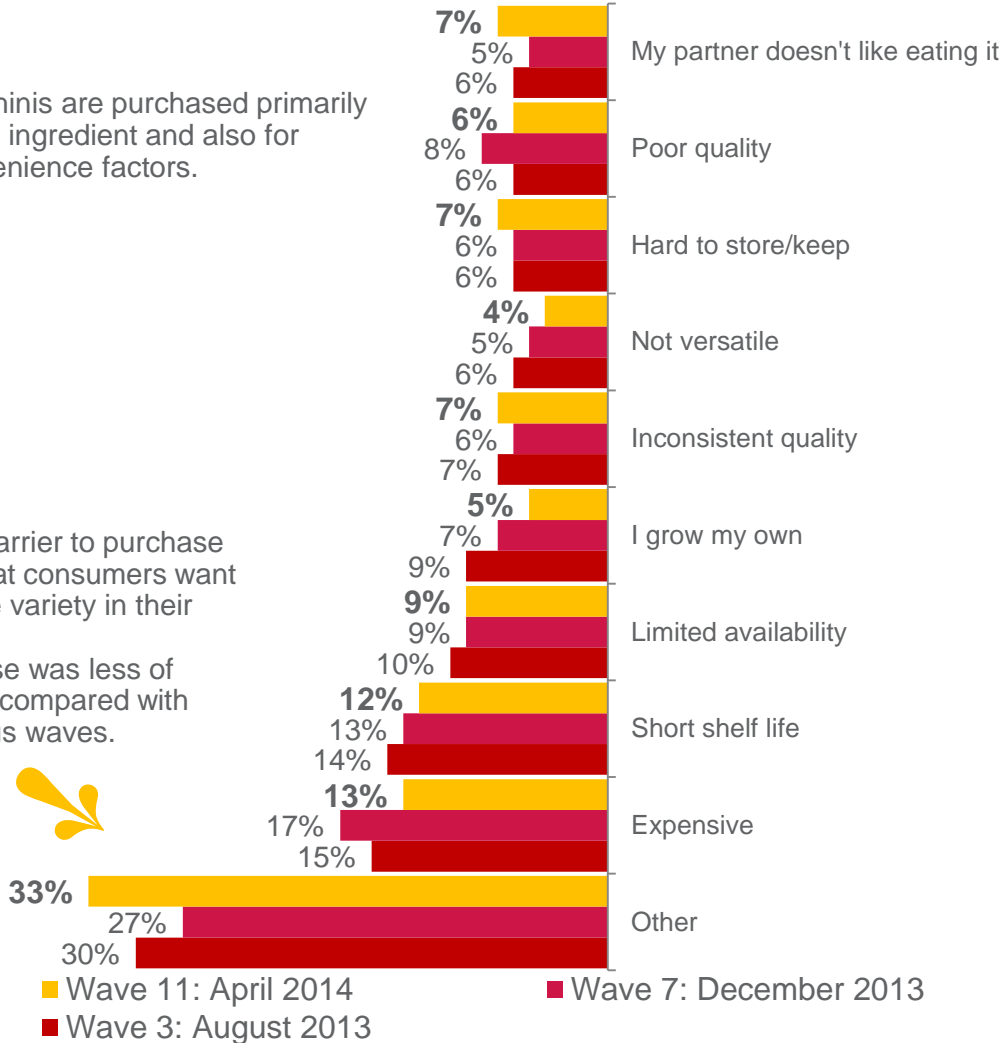
Triggers



Zucchinis are purchased primarily as an ingredient and also for convenience factors.

Barriers

Main barrier to purchase was that consumers want to have variety in their diets. Expense was less of barrier compared with previous waves.



➤➤➤ Cooking Cuisine & Occasions



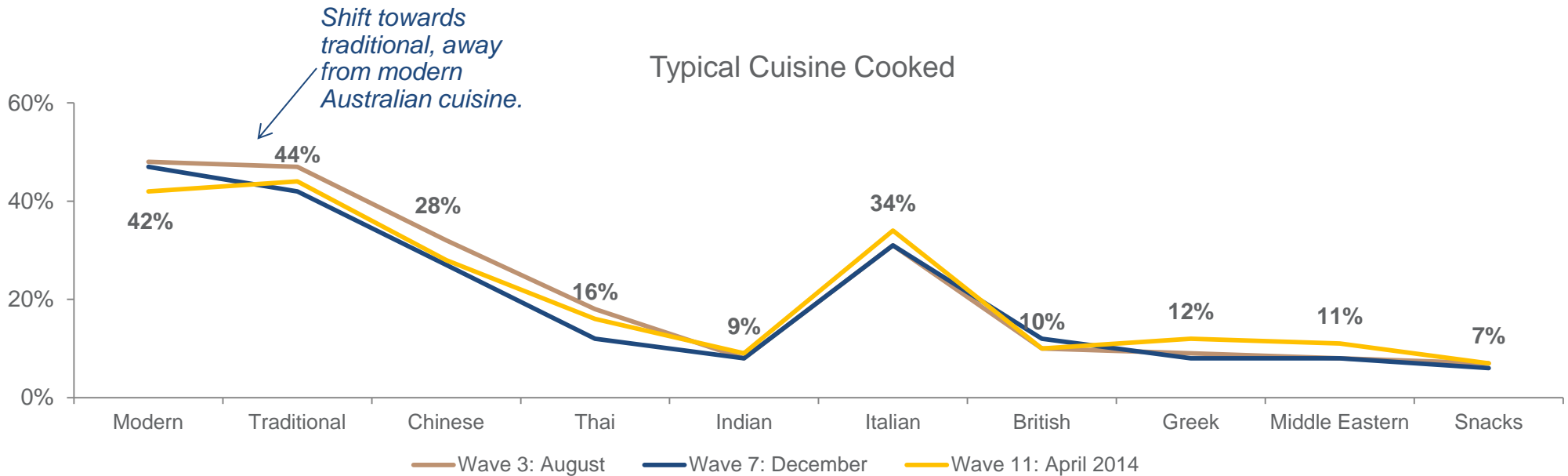
- Consumers preferred to cook zucchinis in Australian and Italian cuisine.
- Cuisine repertoire was consistent across waves.
- The main consumption occasion of zucchinis were weekday dinners.



Wave 11 Top 5 Consumption Occasions

	Wave 11	Wave 7	Wave 3
Weekday dinner	53%	▲	▲
Family meals	39%	▼	▼
Quick meals	35%	▼	▼
Weekend dinner	32%	▲	▲
Everyday meals	29%	—	▼

Typical Cuisine Cooked



▼ : Indicates LOWER score than current wave.
▲ : Indicates HIGHER score than current wave.

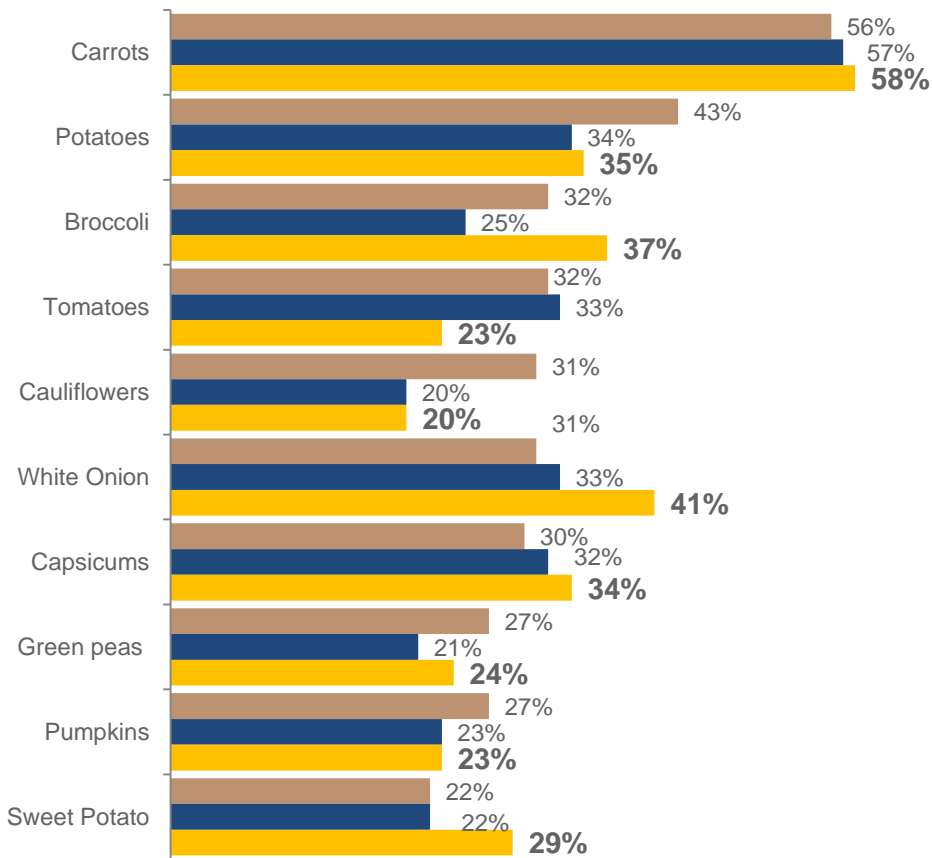
Sample Wave 3 N=502, Wave 7, N=329, Wave 11 N=302
 Q10. What cuisines do you cook/consume that use <commodity>?
 Q11. Which of the following occasions do you typically consume/use <commodity>?



Cooking Preferences



Top 10 Accompanying Vegetables



■ Wave 3: August 2013 ■ Wave 7: December 2013 ■ Wave 11: April 2014

- ⇒ There was an increase in zucchini being served with broccoli, white onion, capsicums and sweet potato compared with Waves 3 and 7.
- ⇒ Stir-frying was the main cooking technique used. Steaming and soup were also common ways to cook zucchini.

Top 10 Cooking Styles

	Wave 3	Wave 7	Wave 11
Stir frying	46%	51%	55%
Steaming	42%	33%	38%
Soup	28%	24%	30%
Baking	23%	24%	26%
Boiling	21%	18%	25%
Sautéing	21%	22%	12%
Roasting	19%	23%	25%
Microwave	18%	22%	16%
Grilling	18%	18%	16%
Stewing	17%	15%	19%

Sample Wave 3 N=502, Wave 7, N=329, Wave 11 N=302

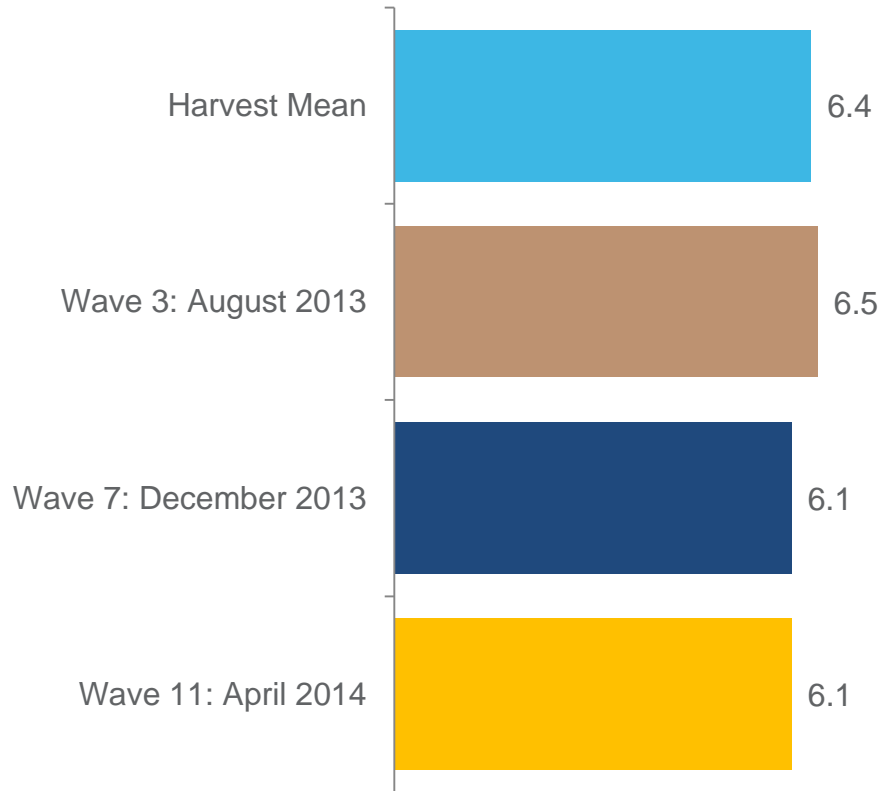
Q9. How do you typically cook <commodity>?

Q10a. And when are you serving <commodity> which of the following do you also serve together with this?

Importance of Provenance



⇒ Provenance was deemed to be fairly important to consumers and on trend with December 2013. However, this is somewhat lower than other commodities tracked thus far.



Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 3 N=502, Wave 7, N=329, Wave 11 N=302



Freshness and Longevity

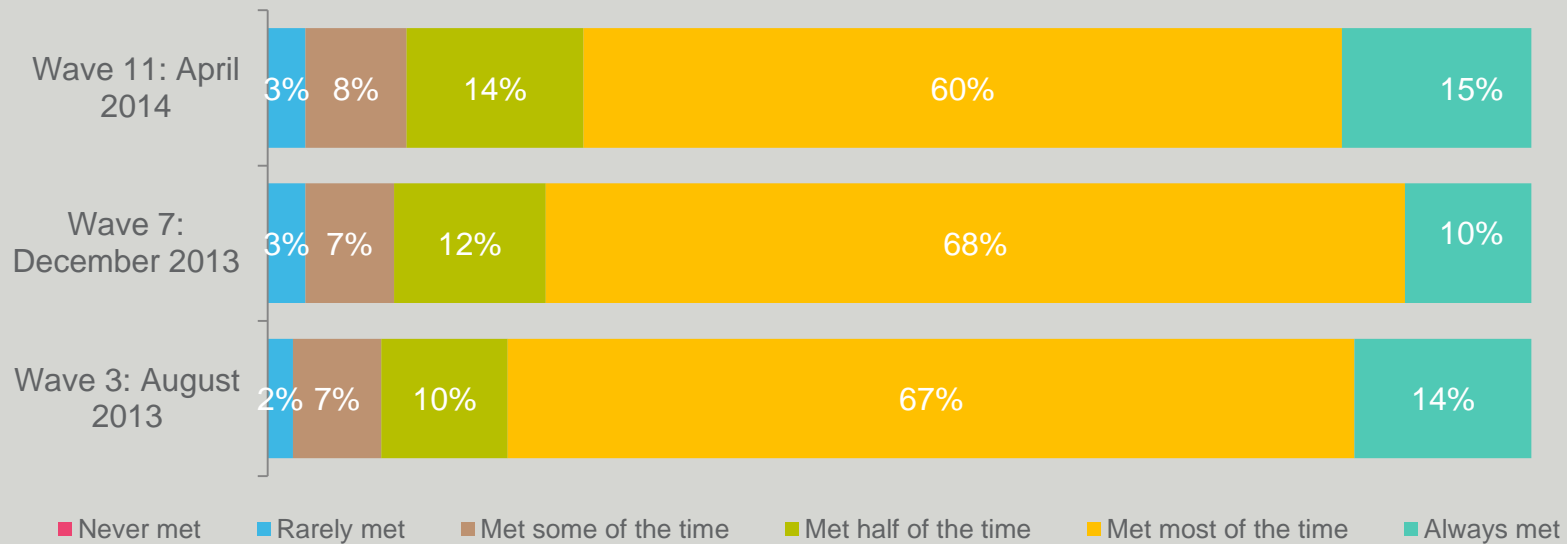


Expected to stay fresh for **8.2 days**

- ⇒ Consumers expected zucchini to remain fresh for over eight days, which was in line with August and December last year.
- ⇒ However, there was a downturn in expectation of freshness being met. Consumers were less likely to indicate that freshness was met most of the time compared with previous waves.

8.2 days, Wave 3
 7.9 days, Wave 7

Expectations Met



Sample Wave 3 N=502, Wave 7, N=329, Wave 11 N=302
 Q12. How long do you expect <commodity> to stay fresh for, once you have purchased it?
 Q13. How often is this length of freshness met when you buy <commodity> ?

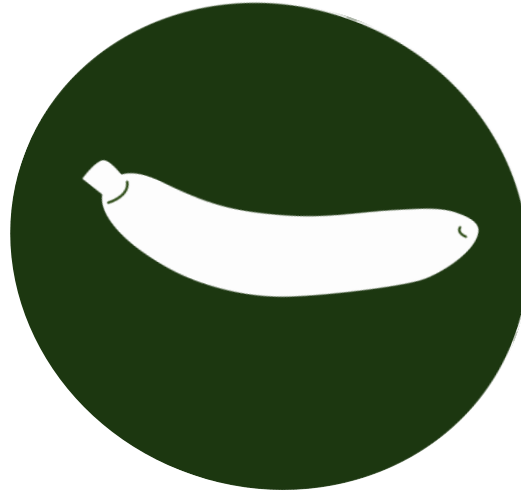


Trends: Zucchini

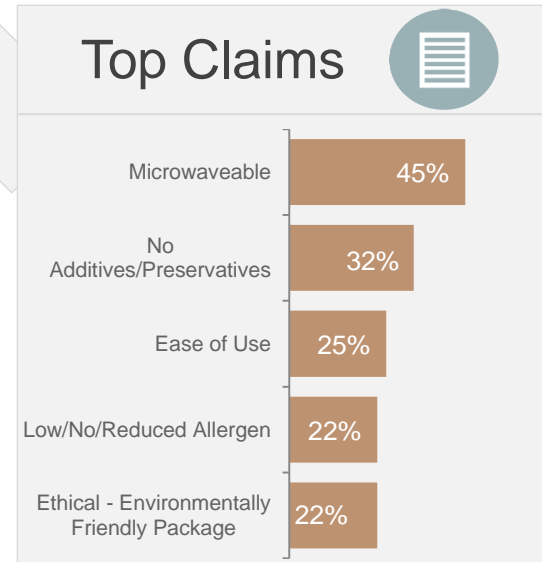
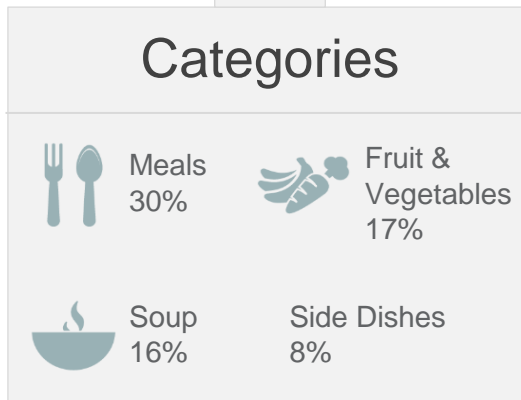
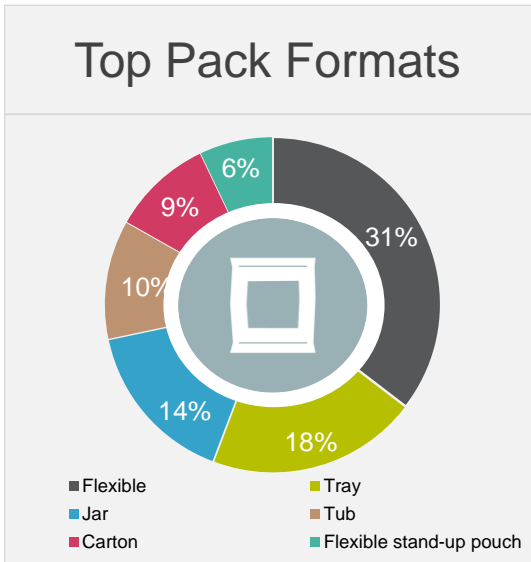
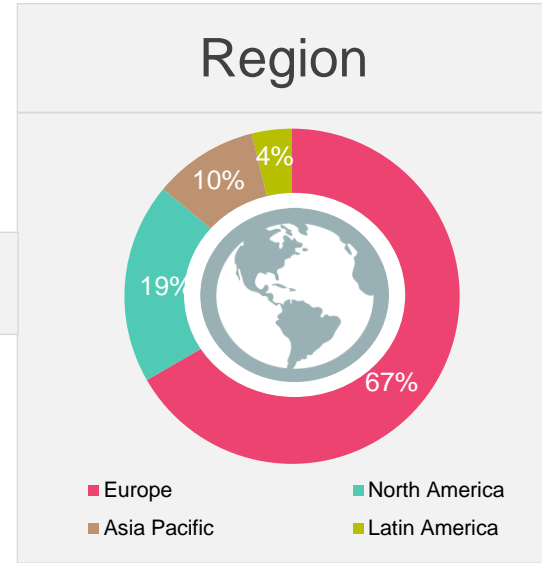
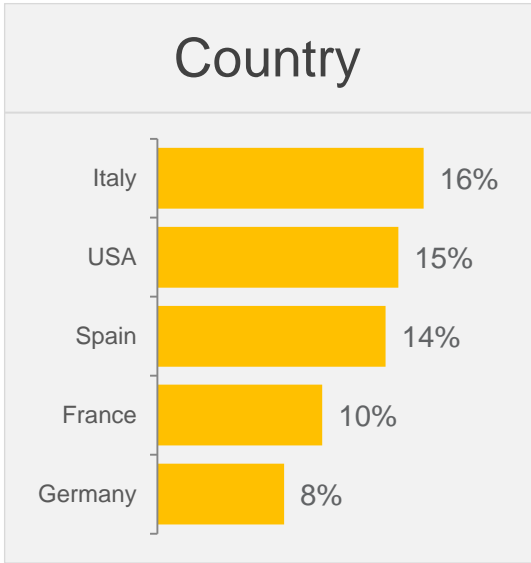
Zucchini Global NPDs

February – April 2014

There were 129 global launches of products that contain zucchini. The majority of these launches occurred in Europe. Products were launched in meals, fruit and vegetables and soup categories. Flexible and tray formats were the most common packaging used.



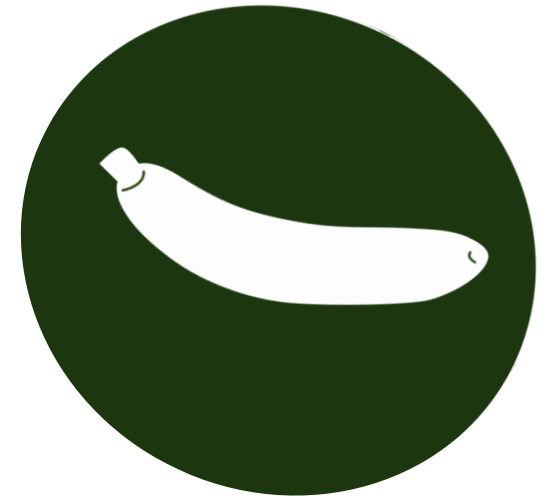
129 Global Launches





Zucchini Product Launches: Last 3 Months (February – April 2014) Summary

- There were 129 global zucchini launches in the last 3 months, which was slightly lower than the number of launches between October to December last year.
- In Australia, five products were launched that contained zucchini as an ingredient.
- Launches were predominantly in Europe (67%), which is up from previous waves. Italy, USA and Spain were the most common countries for launches.
- The most common packaging used for zucchini products were flexible formats (31%) and trays (18%).
- Meals (30%) was the top category for launches, followed by fruit and vegetables (17%) and soup (16%).
- Top claims were consistent with previous waves. Convenience was the key trend; microwavable (45%) and ease of use (25%).
- The most innovative product launched was Vegetarian Curry Zucchini Bread Spread from Germany (examples of these can be found in the following pages).



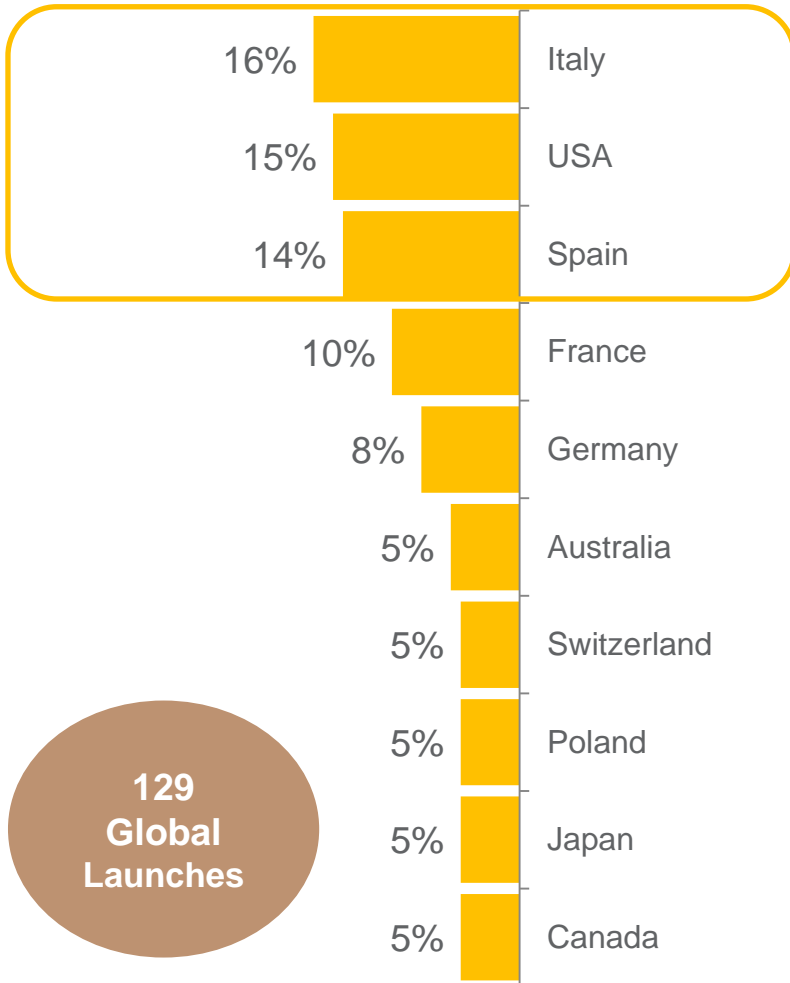


Zucchini SKUs

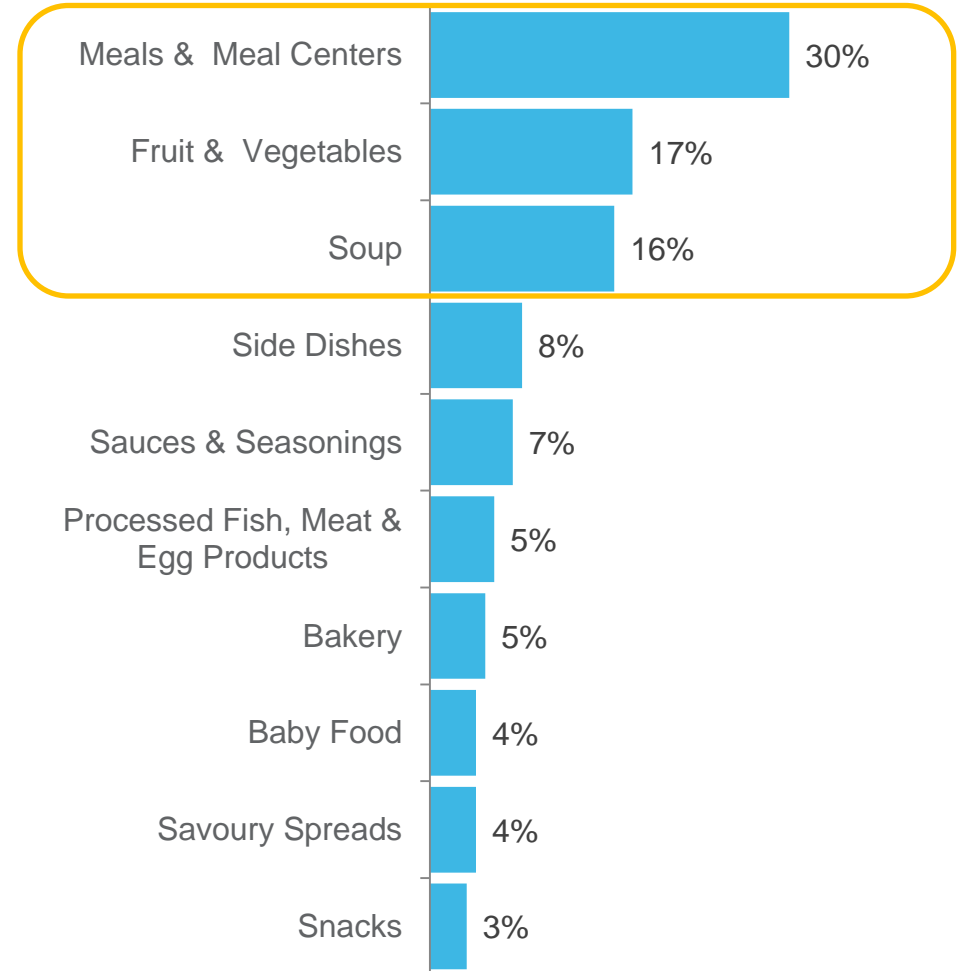
Country, Region & Categories

- ▶ USA, Italy and Spain remained the top launch countries.
- ▶ Top categories for launch were meals, fruit and vegetables and soup.

Top Launch Countries



Top Launch Categories



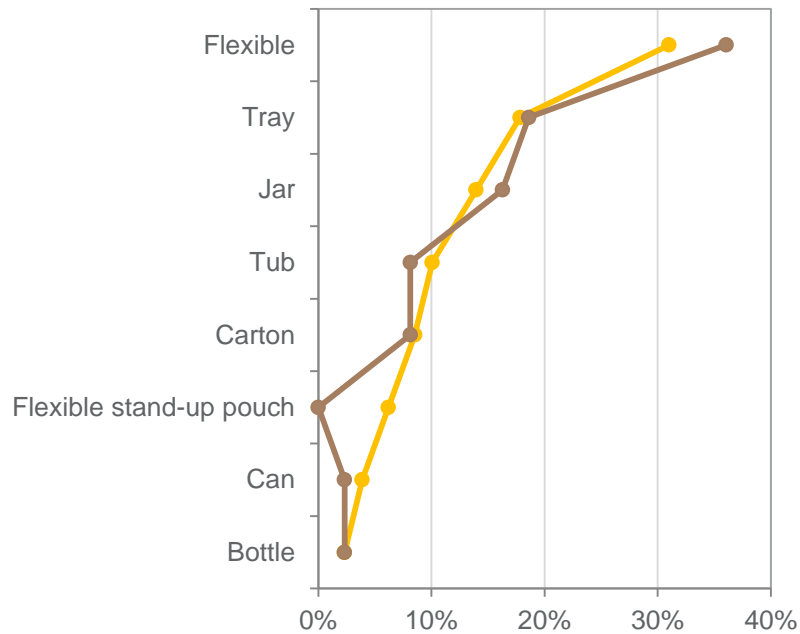


Zucchini Launches

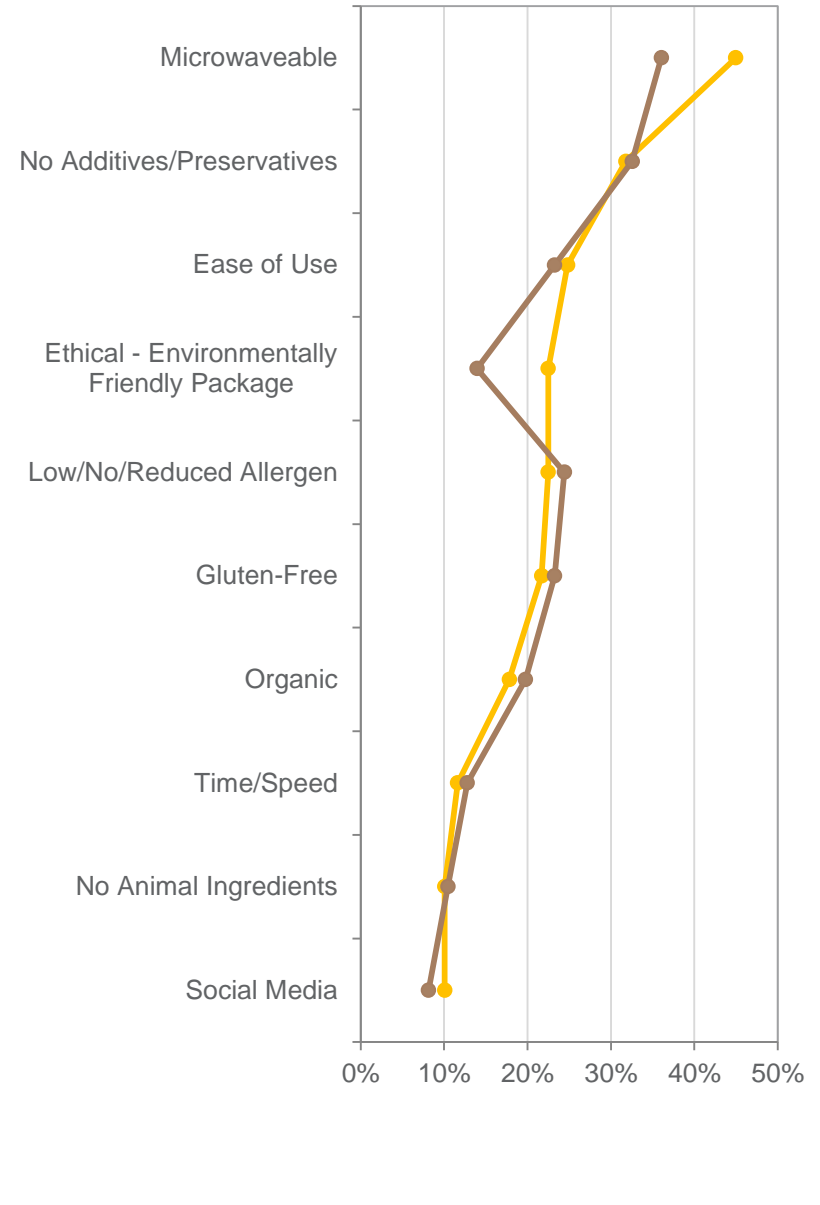
Top Claims & Pack Formats Used

- Flexible packaging remained the most common format used, followed by trays and jars.
- Consistent with previous trends, microwavable claims were the most commonly used on zucchini products launched.

Top Pack Formats Launched



Top Claims Launched



Global
Europe

»»» Innovative Zucchini Launches: L3M (February-April 2014)

Nissin Spao Premium Tomato & Basil Spaghetti with Zucchini (Japan)

Nissin Spao Premium Tomato & Basil Spaghetti with Zucchini features thin, al dente spaghetti made with 100% durum semolina flour and rich tomato sauce containing balsamic vinegar. It features zucchini, shoulder bacon and mozzarella cheese as topping. It comes with a separate sachet of basil sauce.



Claims:
Premium, Microwaveable

Shef Kukhar Korean Style Zucchini Pickle (Ukraine)

Shef Kukhar Kabachky Po-Koreys'ki (Korean Style Zucchini Pickle) is free of GMO. The product retails in a 200g pack.



Claims:
Zucchini, Carrot, White Sugar, Sunflower Seed Oil, Salt, Garlic, Spices, Acetic Acid (Food Acids), Sodium Benzoate (Preservatives)

Kewpie Gu No Sauce Demiglace Tomato Sauce with Five Vegetables (Japan)

Kewpie Gu No Sauce Demiglace Tomato Sauce with Five Vegetables contains onion, carrot, zucchini, pepper, carrot and demiglace sauce. The product retails in a 155g pack. Launched on February 21, 2014, with an RRP of 257 yen.



Claims:
No information available

Dr. Praeger's Kale Veggie Burgers (USA)

Dr. Praeger's Kale Veggie Burgers are an all natural product that is a good source of fiber, is made with quinoa and is free from GMO, gluten and cholesterol. It is also low in saturated fats and is free from preservatives and artificial ingredients.



Claims:
No Additives/Preservatives, All Natural Product, Low/No/Reduced Allergen, Low/No/Reduced Cholesterol, GMO-Free, High/Added Fiber, Vegan, Kosher, Social Media, Microwaveable, Ethical - Environmentally Friendly Package, Gluten-Free, No Animal Ingredients, Low/No/Reduced Saturated Fat

»»» Innovative Zucchini Launches: L3M (February-April 2014)

Stoppato Risotto with Vegetables (Spain)

Stoppato Risotto con Verduras (Risotto with Vegetables) has been made with high quality Vialone Nano rice and dehydrated vegetable sauce. The 100% natural risotto is free from gluten, glutamate, colourants and preservatives, and cooks in 15 minutes by just adding water. The product retails in a 180g pack that yields two portions.



Claims:
No Additives/Preservatives, All Natural Product, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Product, Ease of Use, Gluten-Free

Le Grand Ratatouille Sauce (Canada)

Le Grand Ratatouille Sauce is a tomato sauce with grilled vegetables and herbs de Provence. This sauce is made with natural ingredients, and is free from gluten, sugar, preservatives, cholesterol, and GMOs. The microwavable product is ready in three minutes, is suitable for vegans, and retails in a recyclable 300ml jar.



Claims:
No Additives/Preservatives, Low/No/Reduced Allergen, Low/No/Reduced Cholesterol, GMO-Free, Vegan, Ethical - Environmentally Friendly Package, Low/No/Reduced Sugar, Microwaveable, Gluten-Free, No Animal Ingredients

Vegetarian Curry Zucchini Bread Spread (Germany)

Zwergenwiese Streich's Drauf Curry Zucchini Brotaufstrich Vegetarisch (Vegetarian Curry Zucchini Bread Spread) is a light creamy spread with a hearty spicy note. It is intended for sandwiches or as a seasoning for dressings, dips and sauces. It is suitable for vegetarians and vegans and does not contain GMO, lactose, milk protein, yeast or gluten.



Claims:
Low/No/Reduced Lactose, Low/No/Reduced Allergen, GMO-Free, Gluten-Free, Vegan, Organic, No Animal Ingredients, Vegetarian

Bami Goreng Chinese Noodles with Vegetables (France)

Thiriet Envie de Plaisirs d'Ailleurs Chine Bami Goreng Nouilles Chinoises aux Légumes (Bami Goreng Chinese Noodles with Vegetables) is made with soy sauce and spices. The easy to use product is microwaveable and retails in a 300g pack which serves one.



Claims:
Ease of Use, Ethical - Environmentally Friendly Package, Microwaveable

»»» Innovative Zucchini Launches: L3M (February-April 2014)

Alaskan Hake with Green Risotto (France)

Thiriet Recettes Minutes Risotto Verde au Colin d'Alaska (Alaskan Hake with Green Risotto) is served with garden peas, broccoli and zucchini. This easy to prepare product is microwavable and can be prepared in just minutes. It retails in a single serving 300g recyclable pack.



Claims:
Ease of Use, Ethical - Environmentally Friendly Package, Time/Speed, Microwaveable

Le Bonheur Est Dans Le Pot Organic Moroccan Soup (France)

Le Bonheur Est Dans Le Pot Soupe Marocaine Bio (Organic Moroccan Soup) is an organic certified 100% vegetable soup which is free from gluten. The Ecocert certified product is retailed in a 1L bottle.



Claims:
Low/No/Reduced Allergen, Gluten-Free, Ethical - Environmentally Friendly Product, Ease of Use, Organic, Vegetarian

Carrefour Zucchini Rings (Italy)

Carrefour Zucchini a Rondelle (Zucchini Rings) have been repackaged. These vegetables are frozen straight after harvesting to preserve their nutritional values, and now retail in a newly designed 450g pack.



Claims:
Microwaveable

Bia Organic Vegetable Cream (Spain)

Bia Alimento Infantil Ecológico Crema de Verduras Variadas (Organic Vegetable Cream) has been made with 100% fresh ingredients for babies from four months of age. The organic cream has been steam cooked, and is free from salt, food bits, preservatives, colourants, additives, eggs, lactose, gluten and celery.



Claims:
Low/No/Reduced Lactose, No Additives/Preservatives, Low/No/Reduced Allergen, Gluten-Free, Social Media, Microwaveable, Organic, Low/No/Reduced Sodium, Babies & Toddlers (0-4)



Australian Zucchini Launches: L3M (February-April 2014)

Campbell's Country Ladle Minestrone Soup



Claims:
Ease of Use, No Additives/Preservatives, Ethical - Environmentally Friendly Package, Low/No/Reduced Fat, Microwaveable

Uncle Ben's Express Mediterranean Style Brown Rice



Claims:
No Additives/Preservatives, Vegetarian, Time/Speed, Wholegrain, Microwaveable

Woolworths Select Once Upon A Time Hearty Beef Stew



Claims:
No Additives/Preservatives, Low/No/Reduced Sodium, Babies & Toddlers (0-4), Low/No/Reduced Sugar

Coles Mixed Chargrilled Vegetables



Claims:
No Additives/Preservatives, Vegan, Vegetarian, Ethical - Environmentally Friendly Package, No Animal Ingredients

Leggo's Pasta Sauce For One Chargrilled Vegetables in Napoli Sauce



Claims:
No Additives/Preservatives, Low/No/Reduced Allergen, Time/Speed, Microwaveable, Ease of Use, Gluten-Free, Social Media



In the Media.

»»»→ General Vegetable News (February – April 2014)

- The federal government has announced there will be an inquiry into country-of-origin labelling, with much confusion from shoppers' perspectives.
(www.heraldsun.com.au)
- Well known European ice cream company, Haagen-Dazs recently released two vegetable based ice cream flavours in Japan, tomato-cherry and carrot-orange.
(www.yahoo.com)
- Fruit and vegetables prices were found to drop in April, down 6.7%.
(www.smh.com.au)





Commodity News

(February – April 2014)



- Chinese cabbage is coming into season at the moment as the weather cools. The supply from Queensland should run through until September.
- (www.freshplaza.com)



- Celery has found to be an aphrodisiac, especially to men. Celery contains androsterone, which is known to excite men and makes them release pheromones, which in turn attracts women.
- (www.timesofindia.com)



- Attica, Australia's number one restaurant is serving up a new juice menu to match their degustation. The juice menu includes a cucumber, pear, ginger and sorrel combination.
- (www.goodfood.com.au)



- Breakfast is one of the most important meals of the day, CEO of Macquarie Telecom has zucchini with eggs and salmon for breakfast. He believes good food and exercise is a great way to start the day.
- (www.businessinsider.com.au)



Thanks.