Horticulture Australia and AUSVEG.

VG12078 Project Harvest.

Monthly Tracker Report Wave 7: December 2013

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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.

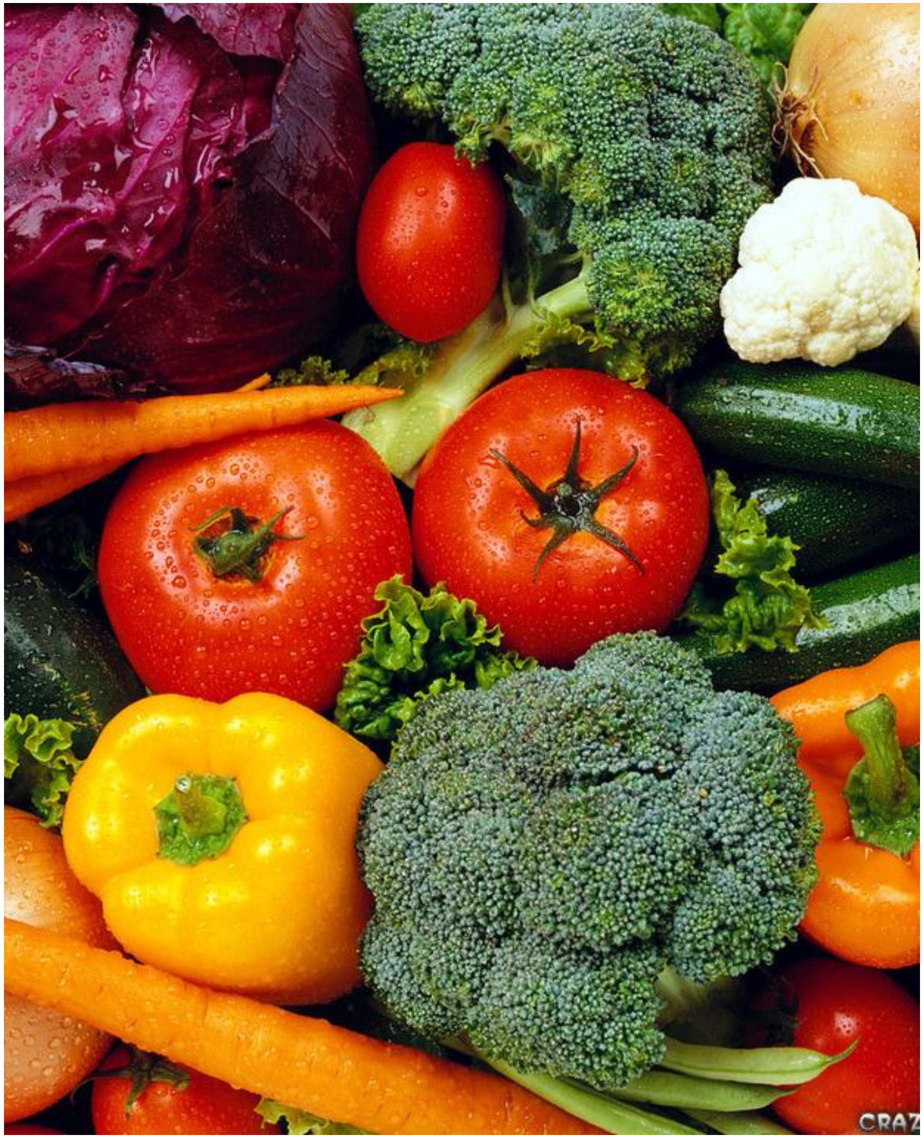
Colmar Brunton has been commissioned to conduct a monthly on-line tracking project following specified vegetables across a three year period; monthly trend analysis; and additional ad-hoc projects to assist in this understanding of consumers.

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 7, December 2013) focuses on:

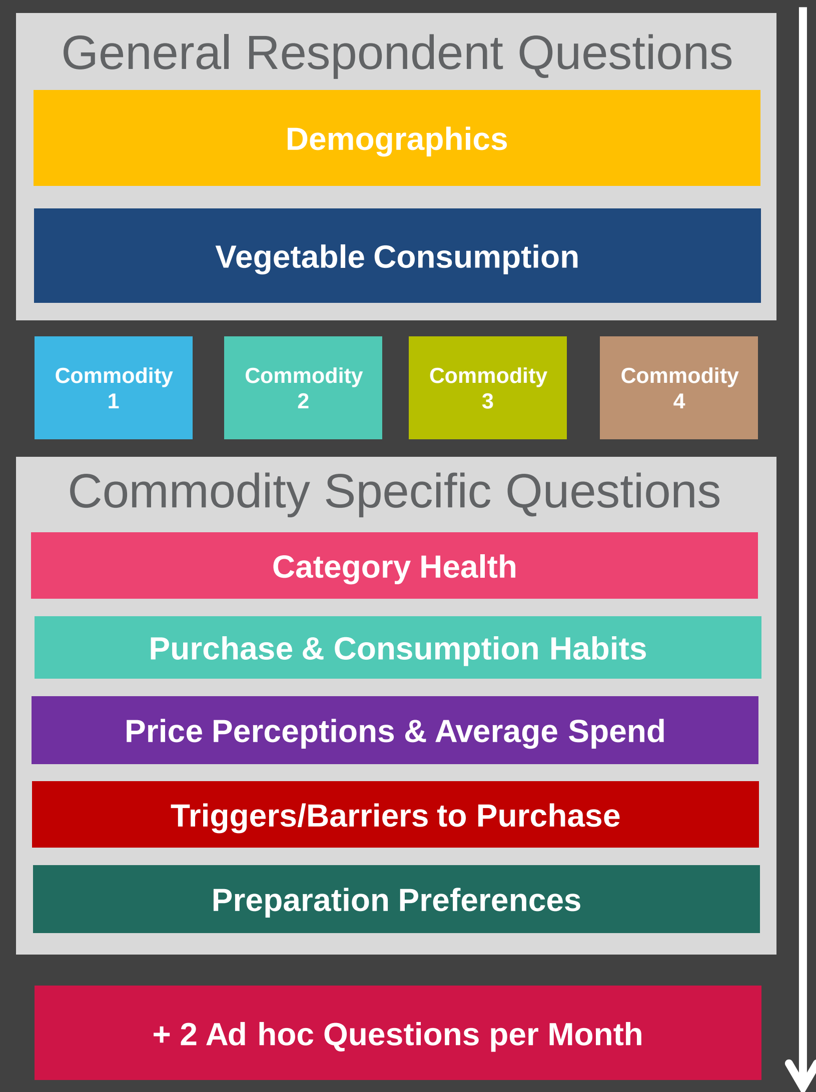
- Cabbage
- Celery
- Cucumber
- Zucchini

Essentially this is the second wave of tracking for these specific commodities, and as such, the current report will bring to light any change over the past four 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=500 respondents 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.



Sample.

In total, 536 respondents completed the questionnaire. Respondents represented 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=536	Cabbage n=317	Celery n=339	Cucumber n=352	Zucchini n=329
Gender					
Male	38%	37%	35%	35%	34%
Female	63%	63%	65%	65%	66%
Age					
18-24 y.o.	5%	6%	4%	5%	5%
25-34 y.o.	21%	20%	25%	24%	22%
35-44 y.o.	13%	15%	14%	12%	12%
45-54 y.o.	18%	16%	16%	17%	17%
55-64 y.o.	24%	24%	22%	24%	27%
65+ y.o.	18%	20%	18%	19%	17%
Household					
Single Income no Kids	18%	15%	17%	17%	18%
Double Income no kids	20%	18%	22%	21%	19%
Young Families	14%	15%	16%	13%	13%
Established Families	19%	19%	19%	19%	19%
Empty Nesters	29%	33%	26%	30%	30%
Location					
New South Wales	20%	18%	19%	20%	24%
Victoria	17%	17%	15%	16%	16%
South Australia	18%	19%	19%	20%	17%
Queensland	16%	17%	15%	15%	15%
Western Australia	18%	19%	17%	18%	16%
Tasmania	9%	6%	10%	9%	9%
Australian Capital Territory	3%	3%	4%	3%	2%

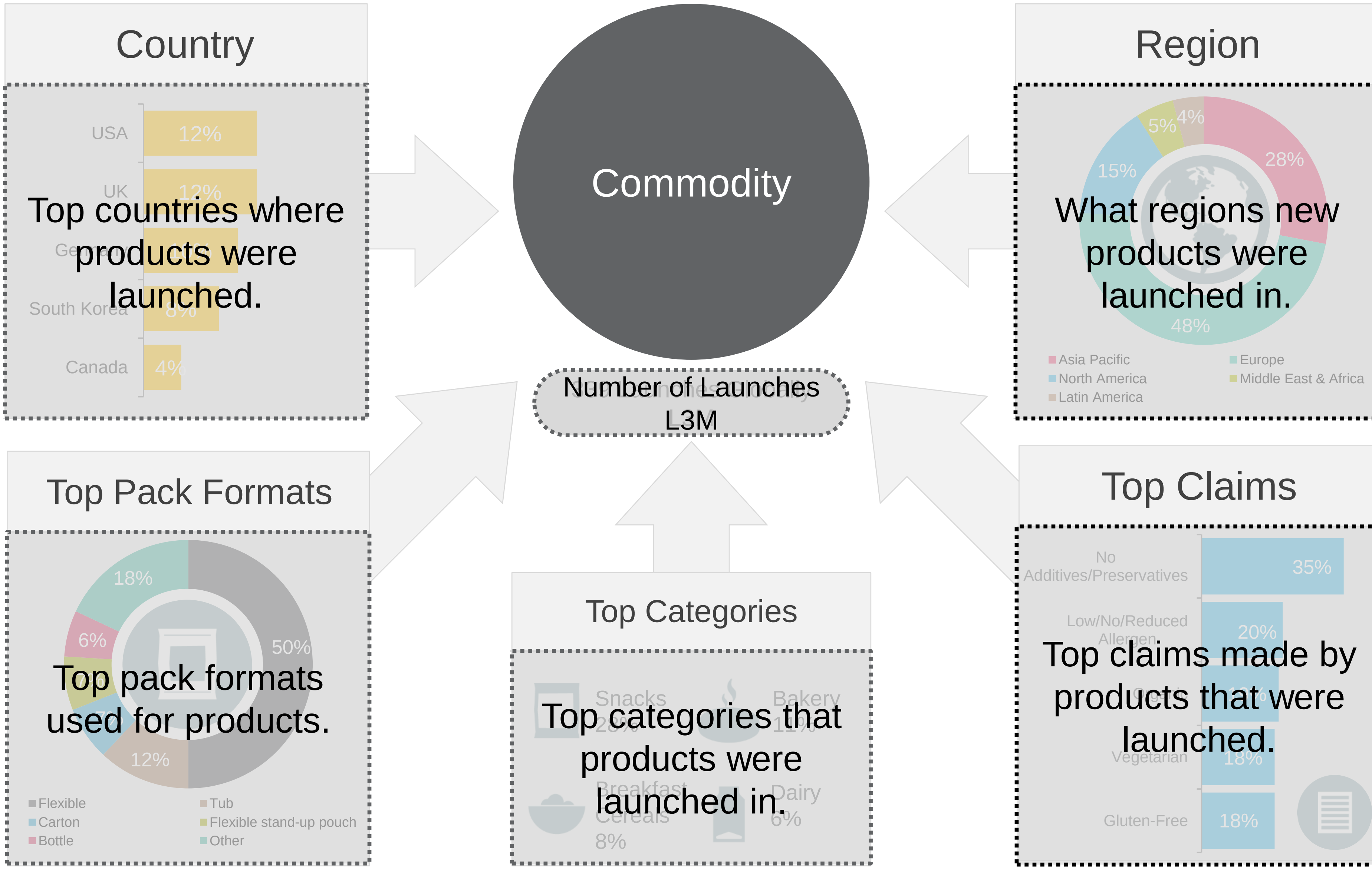
Trends Research: Our Approach

- Colmar Brunton has used a combination of both desk research and in the field 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 7:
Executive Summary

Cabbage Grower Action Plan

↓11%

Overall monthly consumption occasions of cabbage had decreased by 11% compared with Wave 3.

1.

Insight:

Consumers are increasingly likely to purchase smaller formats of cabbage (half/mini), rather than whole.

Recommendation:

With high reports of cabbage being convenient to use and maintaining freshness well, consider highlighting these points as reminders on point of sale material.

2.

Insight:

South Korea is leading new product development that incorporates cabbage.

Recommendation:

Investigate export opportunities in South Korea as a potential to increase Australia's cabbage export market opportunities.

3.

Insight:

Cabbage predominately a 'base' ingredient, potentially uninspiring and at risk of being replaced with more novel alternatives, such as Kale.

Recommendation:

Explore leading, successful innovations in other countries and consider opportunities for Australia to re-excite the category on how to use cabbage in new and exciting ways.

Celery Grower Action Plan

There was a significant decrease in perceived value for money compared with Wave 3.

1.

Insight:

Perceptions of longevity of freshness had decreased compared with Wave 3, potentially due to warmer weather/seasonality.

Recommendation:

Provide instructions on best storage methods to help manage consumer's expectations of freshness.

2.

Insight:

Importance of provenance had decreased.

Recommendation:

Highlight and promote provenance to bring to the forefront of consumer's mind and increase perceptions of value for money.

3.

Insight:

Health was a key trigger for celery purchase.

Recommendation:

Highlight health benefits of celery more clearly and promote as a healthy snacking commodity.

Cucumber Grower Action Plan

19% The main barrier to purchase was short shelf life.

1.

Insight:

Significant decrease in importance of provenance.

Recommendation:

Increase importance of provenance to greater support local producers by highlighting local provenance equates to less transit time and therefore fresher, longer lasting vegetables.

2.

Insight:

Significant increase in awareness of differing cucumber types.

Recommendation:

With taste being the key trigger to purchase, highlight differing taste characteristics between varietals to increase purchase of multiple varieties in a single purchase occasion.

3.

Insight:

Trend towards increased consumption of raw cucumber.

Recommendation:

Consider providing recipes using raw cucumber where it is stocked in-store to drive sales.

Zucchini Grower Action Plan

52%

Consumers purchase zucchini as it is quick and easy to prepare (convenient).

1.

Insight:

Consumer's perceived zucchini to stay fresh for approximately 8 days.

Recommendation:

Highlight good shelf life of zucchini and promote as a panty staple vegetable.

2.

Insight:

Trend indicate expense has increasingly become a barrier to purchase.

Recommendation:

Promote the convenience of zucchini as a counter measure to expense (cost reward ratio).

3.

Insight:

Awareness of varieties and types of zucchini remains low.

Recommendation:

With convenience being the key trigger to purchase, increasing awareness of differing varietals and differing uses is likely to increase pantry stocking of this vegetable.

Wave 7: Fact Base
(1 of 2)

Cabbage:

- Cabbage had relatively low levels of endorsement, but satisfaction levels were on par with vegetables tracked thus far.
- Respondents indicated they purchase of cabbage occurred 3.1 times per month, which was in line with Wave 3, whilst consumption had decreased to 6.8 times per month.
- Overall, cabbage was perceived to be good value for money. On average, consumers purchased 1kg of cabbage per shopping occasion. There was a significant increase in purchase of half cabbage formats. Recalled last spend was $3.00, up 20 cents.
- Pricing tracking for December 2013 revealed variable availability across states. Average price was $4.78 per unit, higher compared with Wave 3.
- Over a third of respondents could not recall any type of cabbage. Those that could had good levels of awareness for multiple varieties.
- Cabbage was expected to stay fresh for over 10 days, consistent with Wave 3. Expectations of freshness were usually met most of the time.
- Top triggers for purchase were convenience and variety of cooking.

Celery:

- Celery received low scores for endorsement, satisfaction, interest and importance, however 90% of consumers indicated they would continue to purchase the same amount in the future.
- Celery was purchased on average 3.1 times per month and was consumed 9.3 times per month, both of which are higher than Wave 3.
- Consumers preferred to purchase whole celery bunches. There was a significant increase in recalled last spend ($2.80) and a subsequent significant decrease in perceived value for money.
- Price tracking was consistent across Australia, with an average of $4.00 per bunch, higher than Wave 3 ($2.60 per bunch).
- Spontaneous awareness of celery types remained very low, with 88% of respondents unable to state a type.
- Consumers expected celery to remain fresh for nearly over 9 days, which was slightly lower than Wave 3. There was also a decrease in expectations of freshness being met.
- Top triggers to purchase were using celery as an accompanying vegetable to dishes, for health benefits and to add variety.

Wave 7: Fact Base
(2 of 2)

Cucumber:

- Cucumber category measures (importance, satisfaction, interest and endorsement) were in line with average Harvest commodities. Consumers reported the strongest future purchase intent for this wave.
- Consumers reported a significantly higher consumption frequency, 13.3 occasions per month. Consumers indicated that they purchased cucumber more than once a week, 4.9 times per month.
- Average purchase weight was 700g and recalled last spend was $2.80, which was consistent with Wave 3. Individual cucumbers remained the most purchased format. Cucumber was perceived to have relatively good value for money.
- Pricing tracking of Lebanese cucumber revealed a decreased average price of $4.84kg, compared with $5.42kg during August 2013.
- Unprompted awareness of types and varieties was high, with Lebanese and Continental cucumbers being the most recalled. This was significantly higher recall than Wave 3 (August 2013). However, a quarter of respondents could not recall a specific type.
- Cucumber was expected to stay fresh for just over a week and expectations were met at least most of the time 76% of occasions.
- Top drivers of purchase were taste and health benefits.

Zucchini:

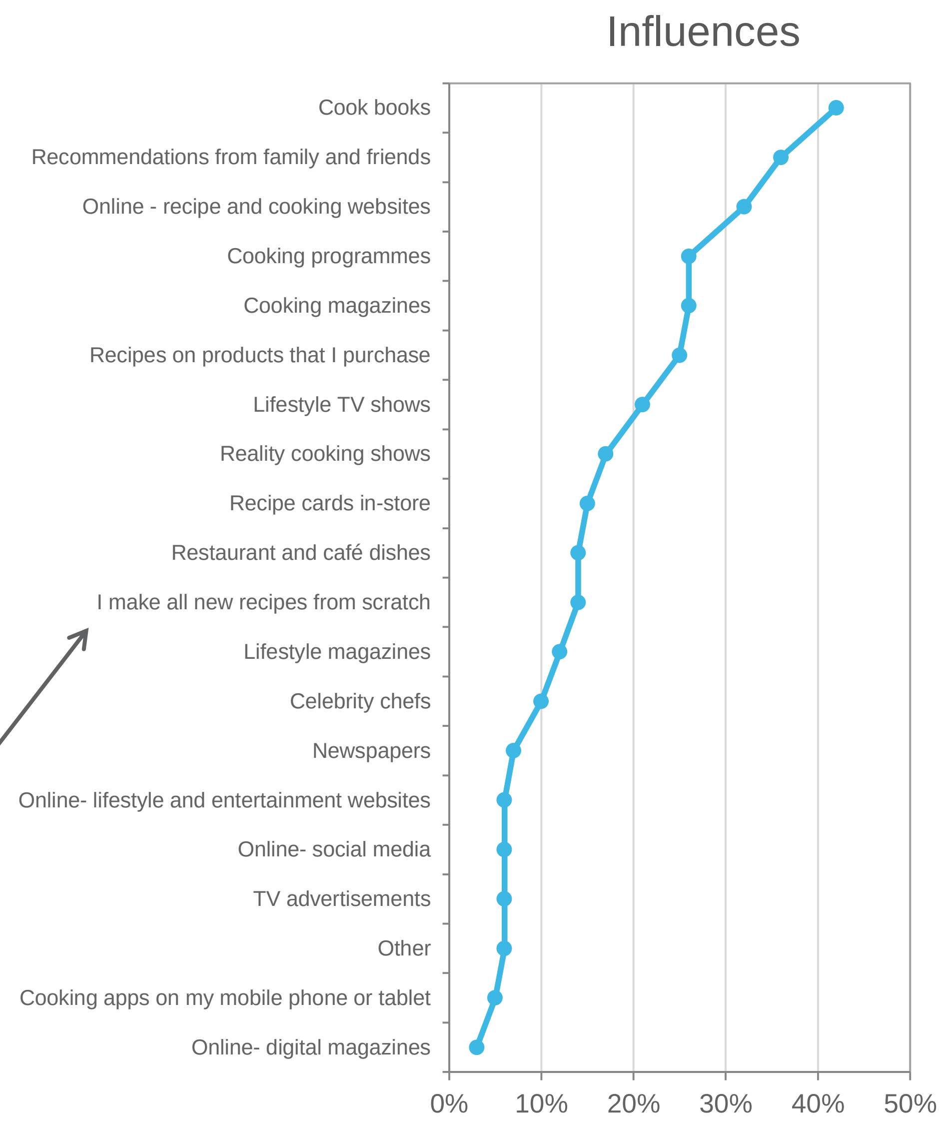
- Zucchini received relatively low consumer sentiment (category health measures), particularly importance and interest in new varieties.
- On average zucchini was purchased 3.4 times per month and consumed 6.8 times per month, which was lower than Wave 3.
- Compared with Wave 3, consumers where purchasing significantly less zucchini (600g) and perceptions of value for money had also significantly decreased (6.0/10) compared with Wave 3. Consumers typically purchased 3 zucchinis per purchase.
- Price tracking indicated a considerable increase in national average, $5.09kg, up $1.24kg.
- Awareness was of zucchini types remained low, with 72% of consumers unable to state a zucchini type.
- Zucchini was expected to stay fresh for 8 days. Expectations of freshness were at least most of the time on 78% of occasions.
- Top triggers to purchase were convenience factors of both preparation and cooking. Variety was also an important trigger to future purchase.

Wave 7:
Ad-Hoc Questions

Additional Monthly Questions Asked

Influence on cooking new vegetables and recipes.

- The main influences when cooking new foods were traditional sources: cookbooks and suggestions from family and friends, and online recipes and cooking websites.
- The influence of cookbooks on new vegetables and recipe trials may be a consequence of the rise of celebrity chef cookbooks and cookbooks are popular gifts (particularly around the holiday season).
- Online recipes were also a strong influence on consumers, opting for cooking websites (ie. taste.com) and possibly driven by the 'Masterchef' phenomenon.
- 14% of respondents indicated that they were influenced little by external sources and trialled new recipes and vegetables on their own accord.

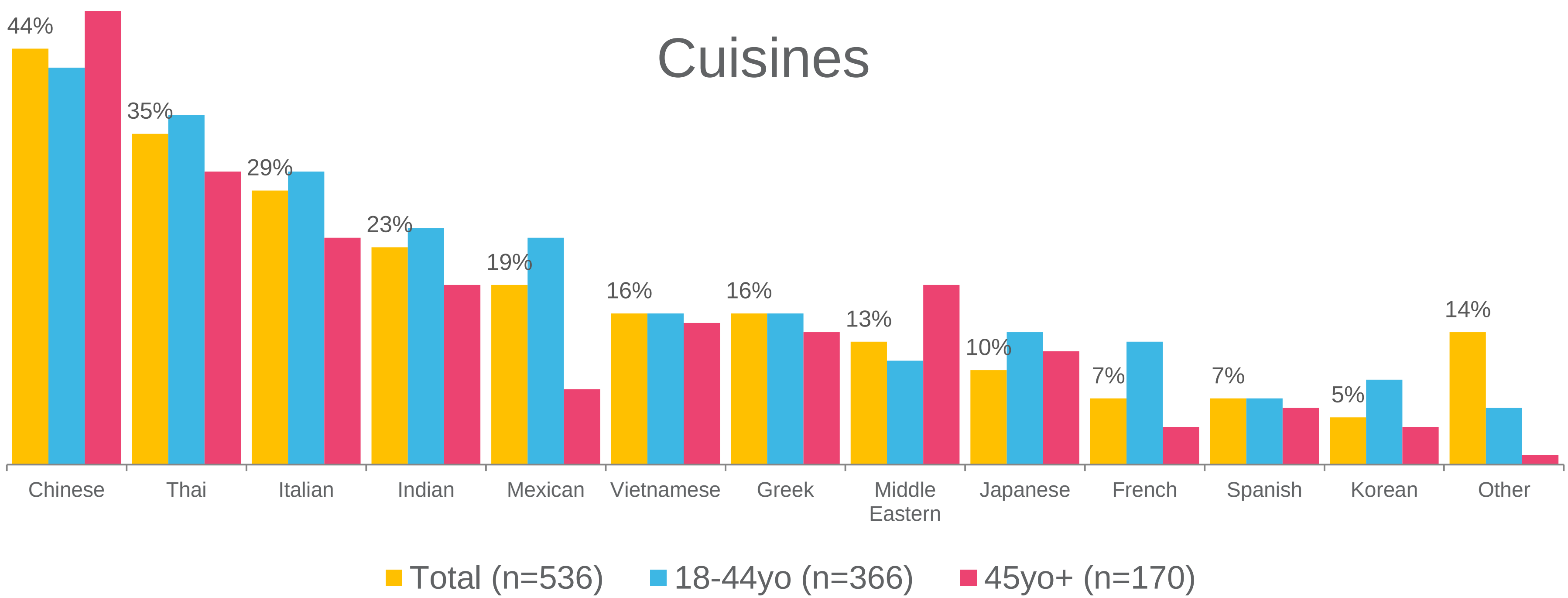


AH1. When purchasing new vegetables and/or cooking new recipes, what is you main influence(s)?
Total Respondents N=536

Additional Monthly Questions Asked

New cuisines in cooking repertoire (last 5 years)

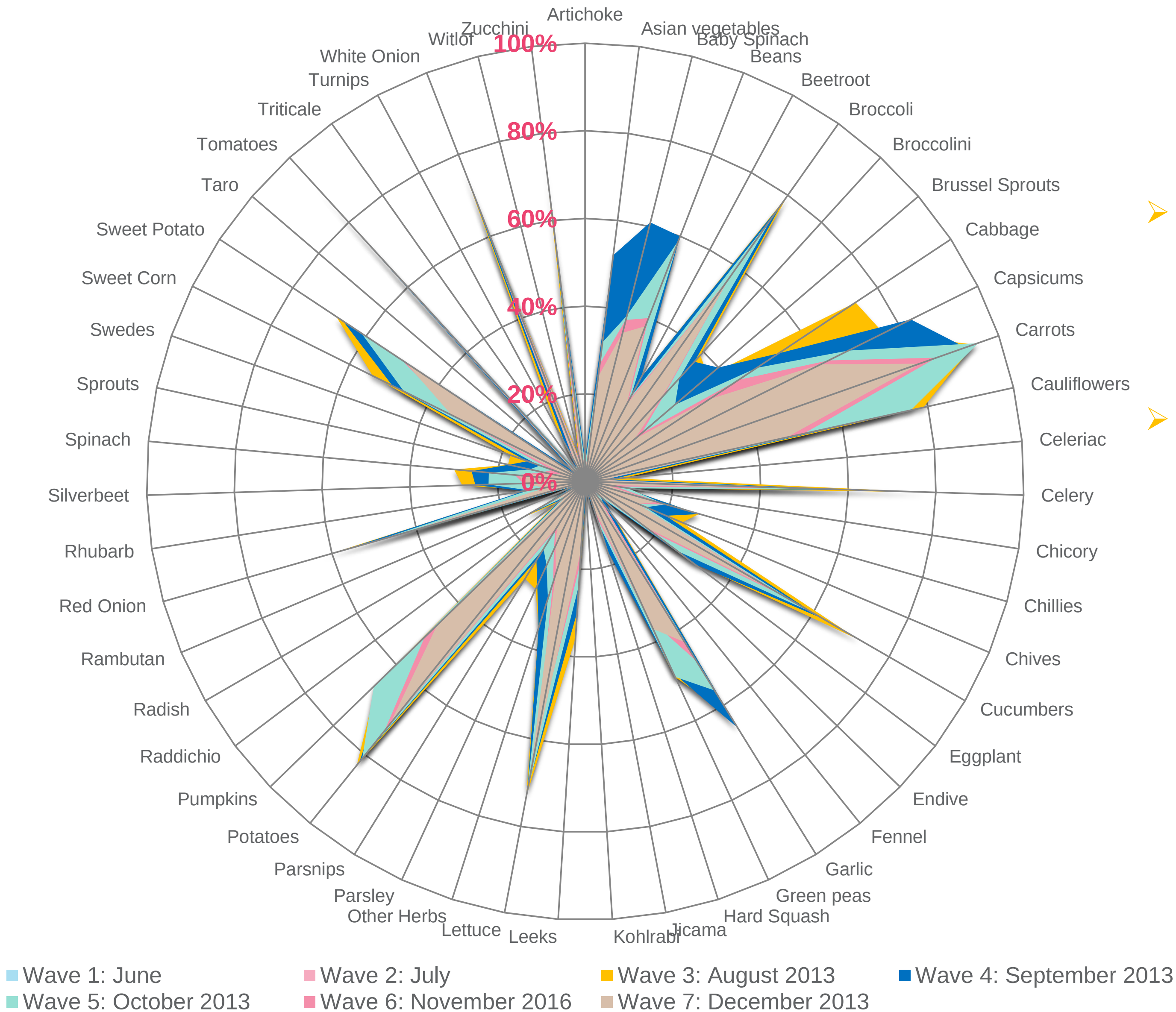
- Asian cuisines, specifically Chinese and Thai, were the most common addition to respondent's cooking repertoire over the last five years. A study^ conducted in 2011 found that Chinese, Italian and Thai were the most popular cuisines in Australia. Some of this popularity can be attributed to influence from Australia's early immigrants.
- Chinese and Middle Eastern cuisines were more likely to adopted by older consumers (45yo+), where as Thai, Mexican and French were more frequently adopted by younger consumers (18-44yo).



AH2. What cuisine(s) have you added to your cooking repertoire in the last 5 years that use fresh vegetables as a main ingredient?
Total Respondents N=536
^http://www.roymorganonlinestore.com/News/State-of-the-Nation-9--Chinese-and-Italian-food-st.aspx

Wave 7: Overall Vegetable Tracking

Vegetables Purchased Last Month



- Overall wave 7 displayed a decreased amount of vegetables purchased compared to previous waves.
- The most purchased vegetables for December were Tomatoes, Carrots, Potatoes and Lettuce, which may be due to Summer months and increased consumption of salad ingredients.

Sample N= Wave 1585
S8. Which of the following fresh vegetables have you purchased in the last month?

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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

- The majority of category health measures for Cabbage, Cucumber Zucchini and particularly Celery, did not meet the Harvest mean. This was clearly evident in endorsement and interest in new varieties.
- Future purchase intent for Cabbage, Cucumber Zucchini was also low. However, these commodities had a high 'same' future purchase intent.
- Cucumber had relatively strong future purchase intent, which may be due to seasonality and Summer months.
- Interest in new varieties of cabbage had slightly decreased since Wave 3 (6.2), this may be due to greater availability of mini cabbage types in mainstream retail channels.

	Cabbage	Celery	Cucumber	Zucchini	Harvest Total Mean
Importance	6.4	5.6	6.4	5.7	6.3
Satisfaction	6.7	6.6	6.6	6.4	6.7
Endorsement	6.3	6.3	6.4	6.4	6.7
Interest (New Types)	6.0	5.4	6.1	5.7	6.1
Future Purchase					
More	11%	8%	13%	9%	13%
Same	88%	90%	85%	89%	86%
Less	1%	2%	3%	2%	2%

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

Cabbage.

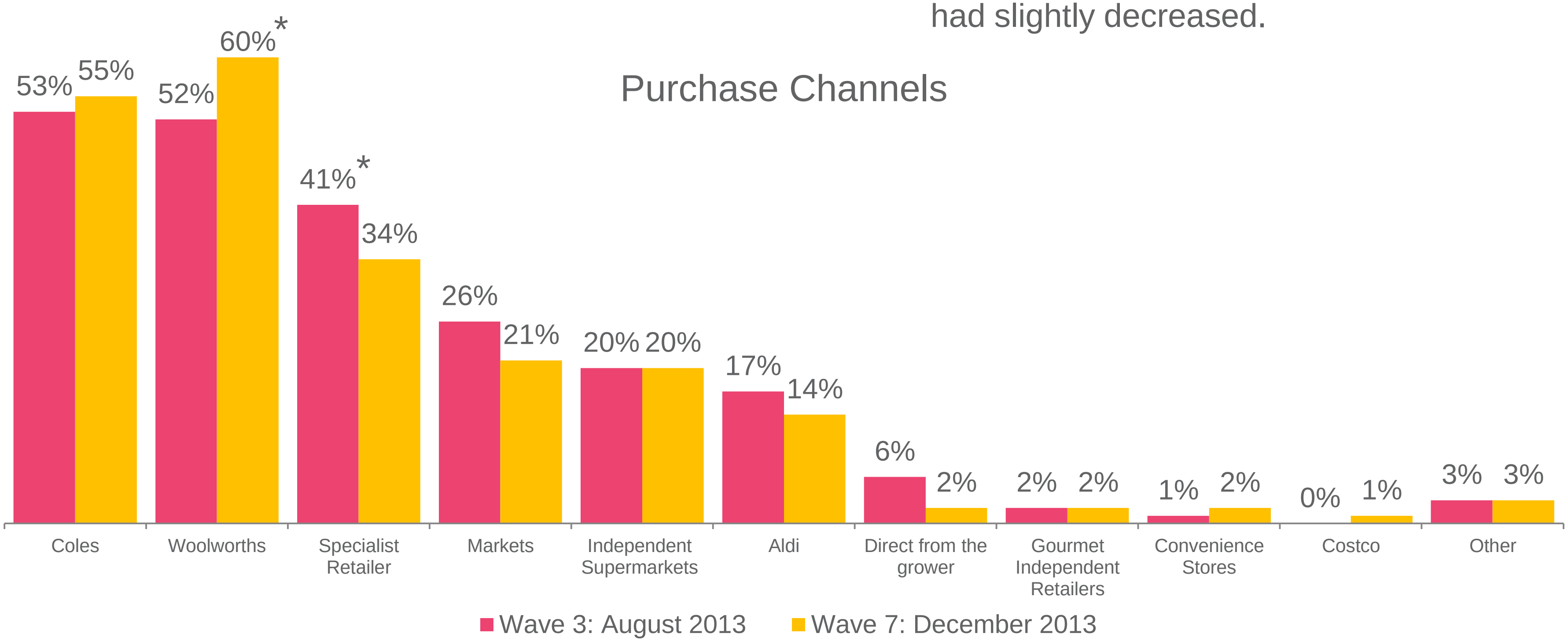
Purchase and Consumption Behaviour

Cabbage

Average Purchase **3.1** times per month (cf. 3.1 times per month Wave 3)

Average Consumption **6.8** times per month (cf. 7.6 times per month Wave 3)

- There was a significant increase in purchase of Cabbage from Woolworths compared with Wave 3.
- A significant decrease in purchase from a specialist retailer was identified.
- Purchase frequency was on trend with Wave 3, whilst consumption occasions had slightly decreased.



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 and Wave 7, N=317
* Indicates significantly higher score between Waves @ 95% CI

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Average Spend & Price Sensitivity

Cabbage

⇛ The average consumer typically purchased **1kg** of Cabbage, which is the same as Wave 3.

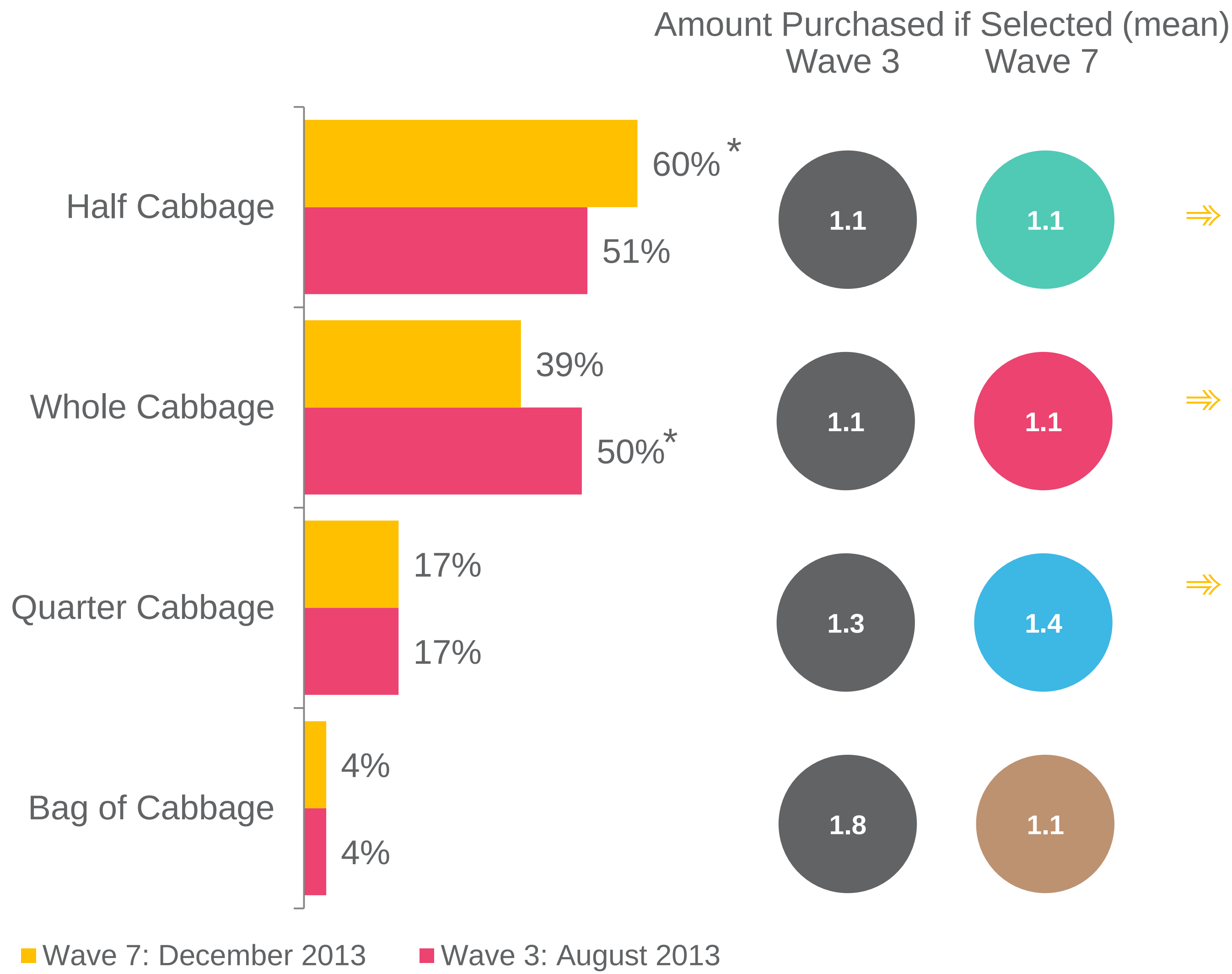
⇛ The average recalled last spend had increased slightly from $2.80 to **$3.00.**

⇛ On average, consumers perceived Cabbage to be good value **(6.5/10),** on trend with Wave 3 (6.6)**.**

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)

Pack Formats Purchased

Cabbage



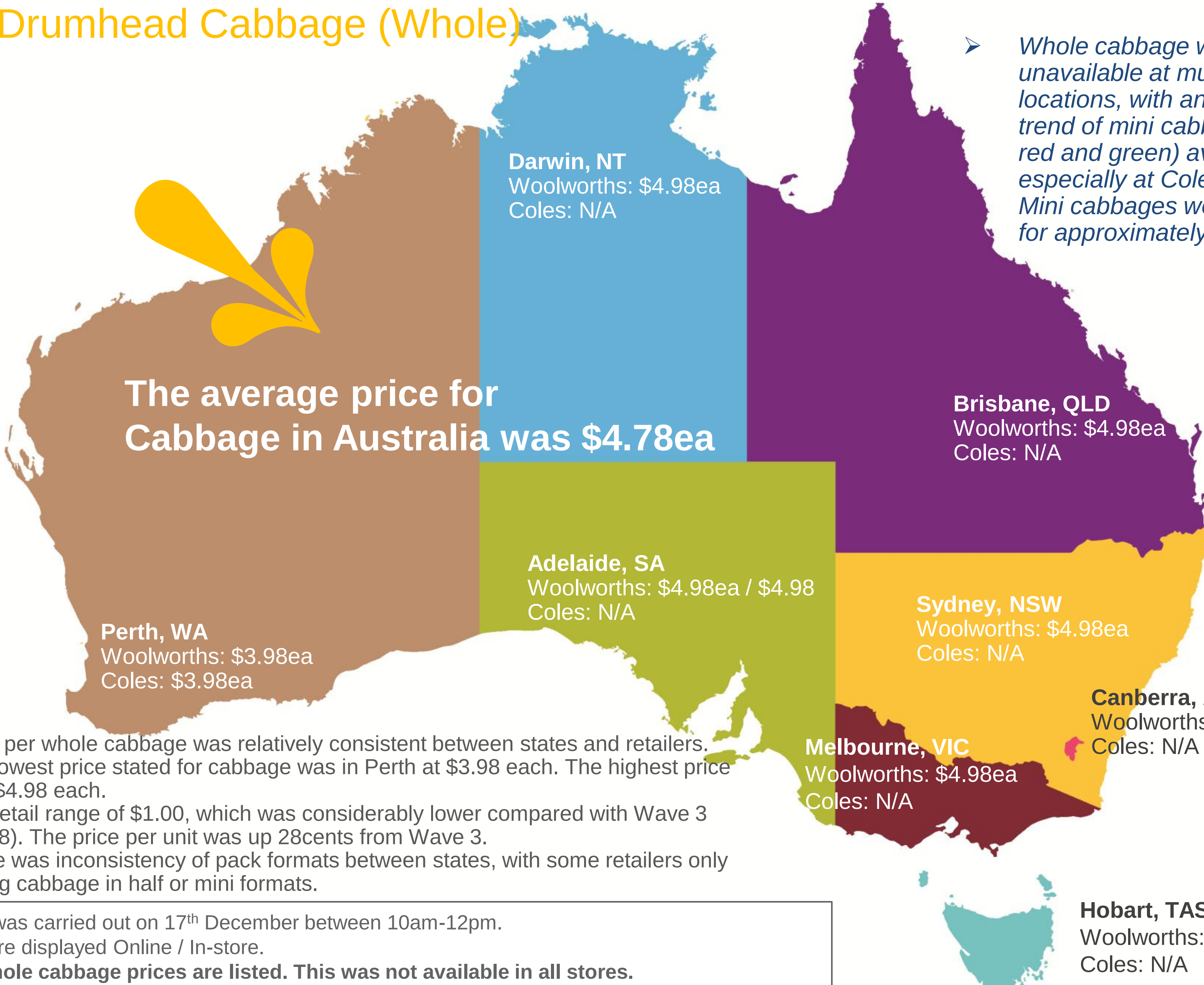
- Half Cabbage was the most preferred pack format, significantly higher than Wave 3.
- Consumers were significantly less likely to purchase Whole Cabbage during Wave 7.
- Pack formats were on trend with Wave 3, however there was a decrease in the number of bags of cabbage consumer's purchased.

Q3a. How much <commodity> does this typically equate to?
Sample Wave 3, N=502 and Wave 7, N=317
* Indicates significantly higher score between Waves @ 95% CI

Online and In-store Commodity Prices

Drumhead Cabbage (Whole)

- *Whole cabbage was unavailable at multiple locations, with an increasing trend of mini cabbage (both red and green) available especially at Coles stores. Mini cabbages were retailing for approximately $2.50 each.*

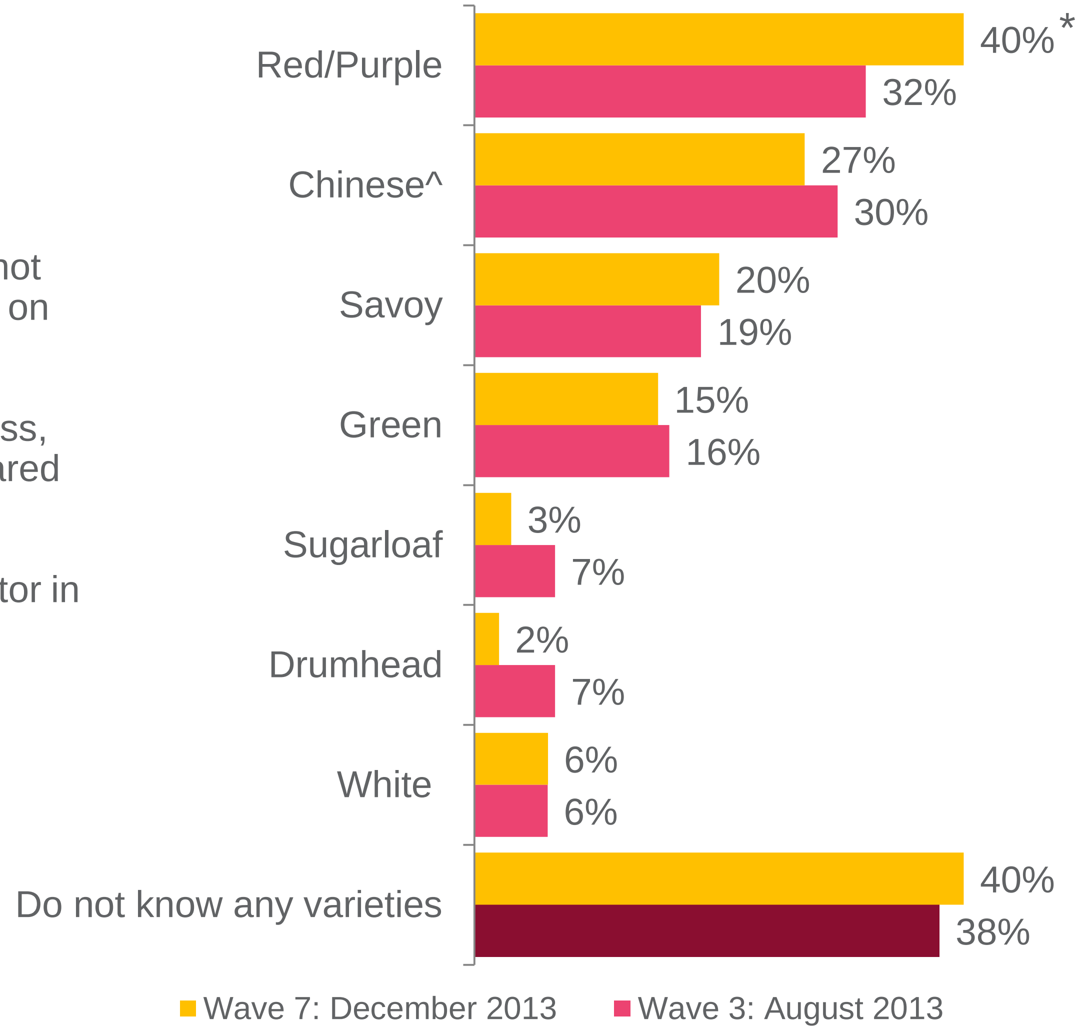


- Price per whole cabbage was relatively consistent between states and retailers. The lowest price stated for cabbage was in Perth at $3.98 each. The highest price was $4.98 each.
- The retail range of $1.00, which was considerably lower compared with Wave 3 ($2.48). The price per unit was up 28cents from Wave 3.
- There was inconsistency of pack formats between states, with some retailers only selling cabbage in half or mini formats.

Pricing was carried out on 17th December between 10am-12pm.
Prices are displayed Online / In-store.
Only whole cabbage prices are listed. This was not available in all stores.
Green text indicates promotional price.

Spontaneous Awareness & Purchase

Cabbage



- 40% of respondents stated they did not know any cabbage types, which was on trend with Wave 3.
- Red/Purple had the highest awareness, which was significantly higher compared with Wave 3.
- Colour remained a distinguishing factor in awareness of cabbage varieties.

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

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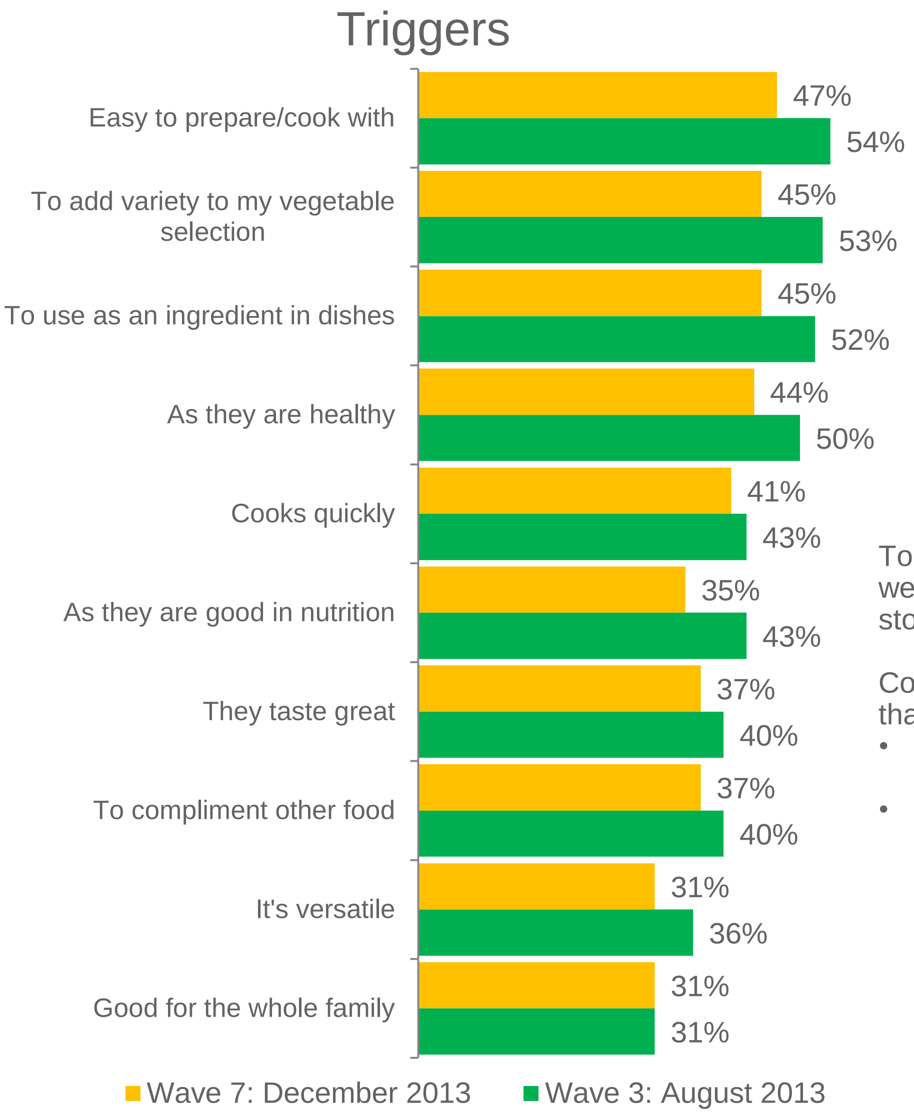
Triggers & Barriers to Purchase

Cabbage

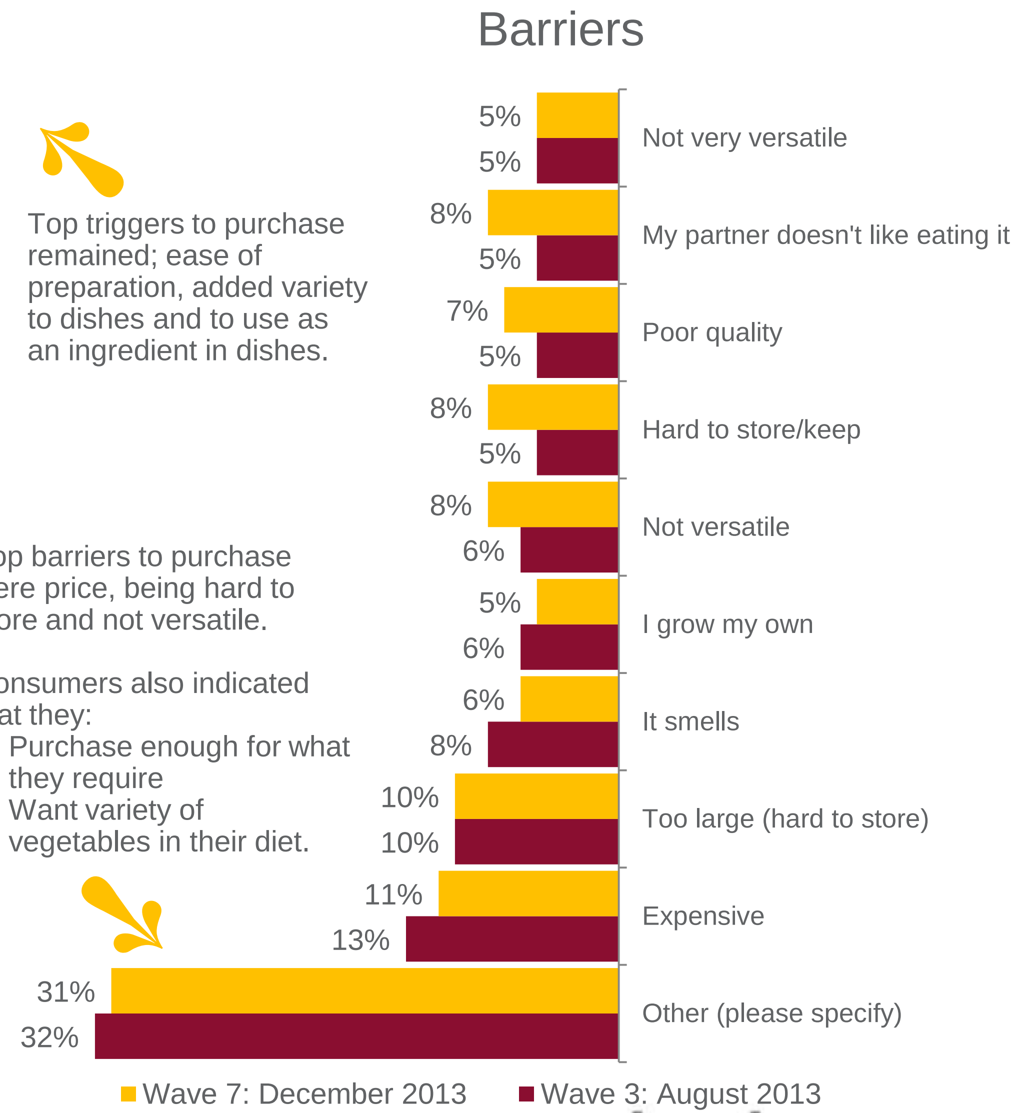


Top triggers to purchase remained; ease of preparation, added variety to dishes and to use as an ingredient in dishes.

Top barriers to purchase were price, being hard to store and not versatile.

Consumers also indicated that they:

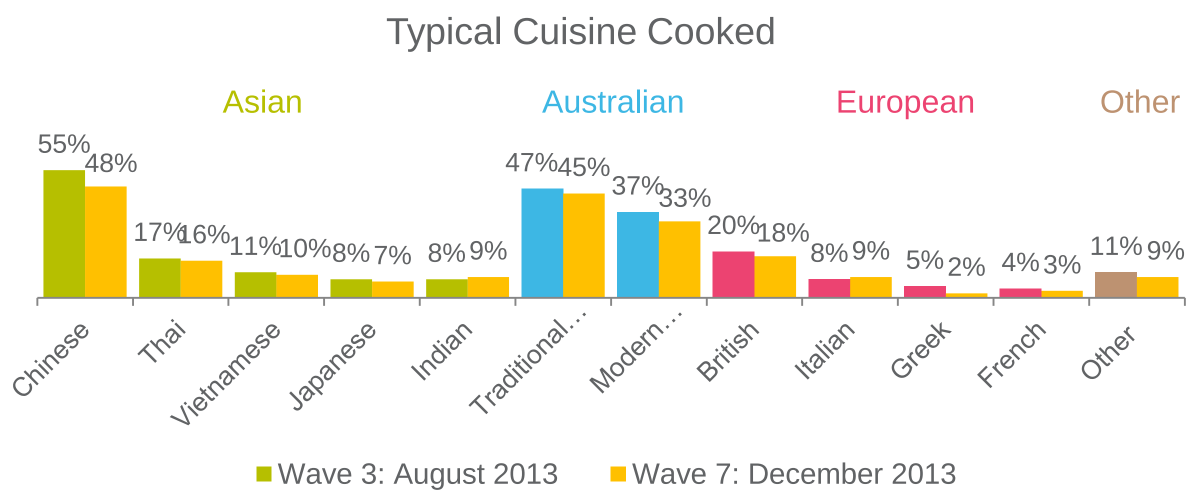
- Purchase enough for what they require
- Want variety of vegetables in their diet.

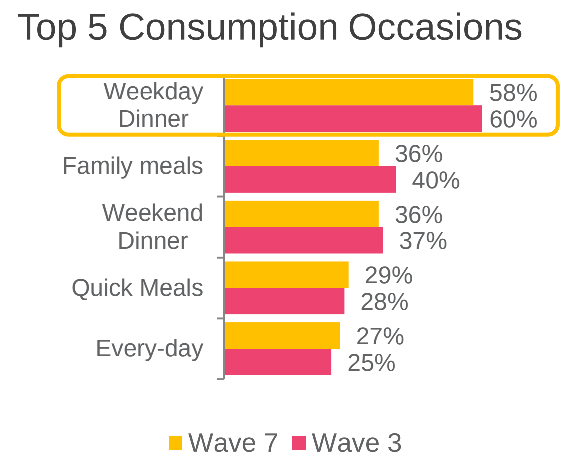


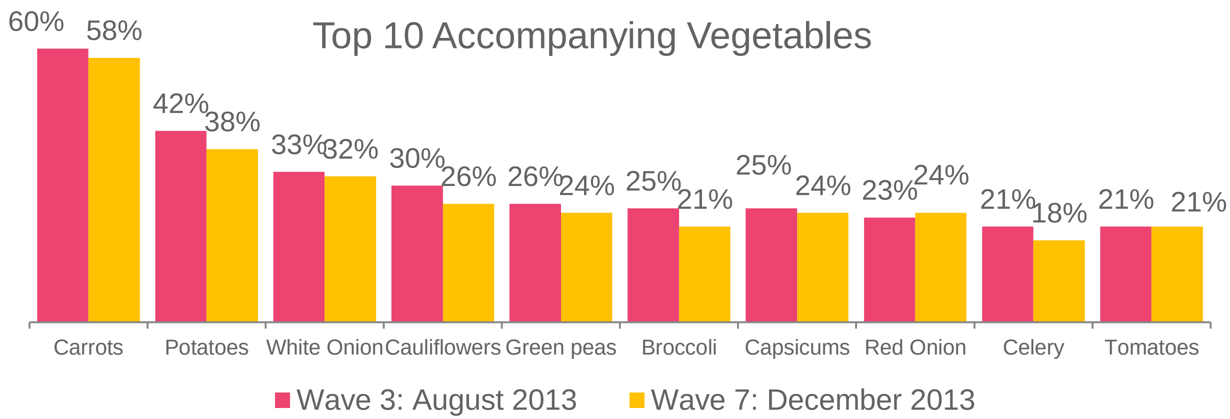
Sample Wave 3, N=502 and Wave 7, N=317
Q7. Which of the following reasons best describes why you purchase <commodity>?
Q8. Which reason best describes why you don't buy <commodity> more often?

Cooking Preferences & Occasions: Cabbage

- ⇛ Chinese cuisine remained the most cooked, with Australian popular. The main accompanying vegetables remained carrots, potatoes and white onions.
- ⇛ Cooking styles were on trend with Wave 3.
- ⇛ Weekday dinners remained the main consumption occasion.







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

Sample Wave 3, N=502 and Wave 7, N=317
Q9. How do you typically cook <commodity>?
Q10. What cuisines do you cook/consume that use <commodity>?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
Q11. Which of the following occasions do you typically consume/use <commodity>?

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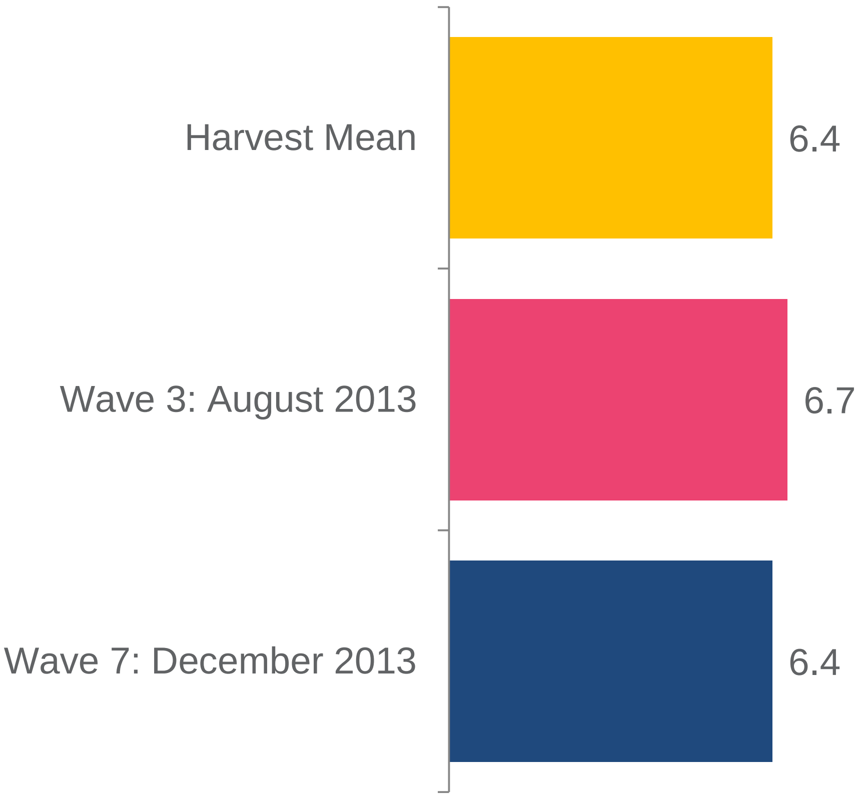
Importance of Provenance

- The importance of provenance was slightly lower than Wave 3, although was on trend with Harvest Mean of vegetables.



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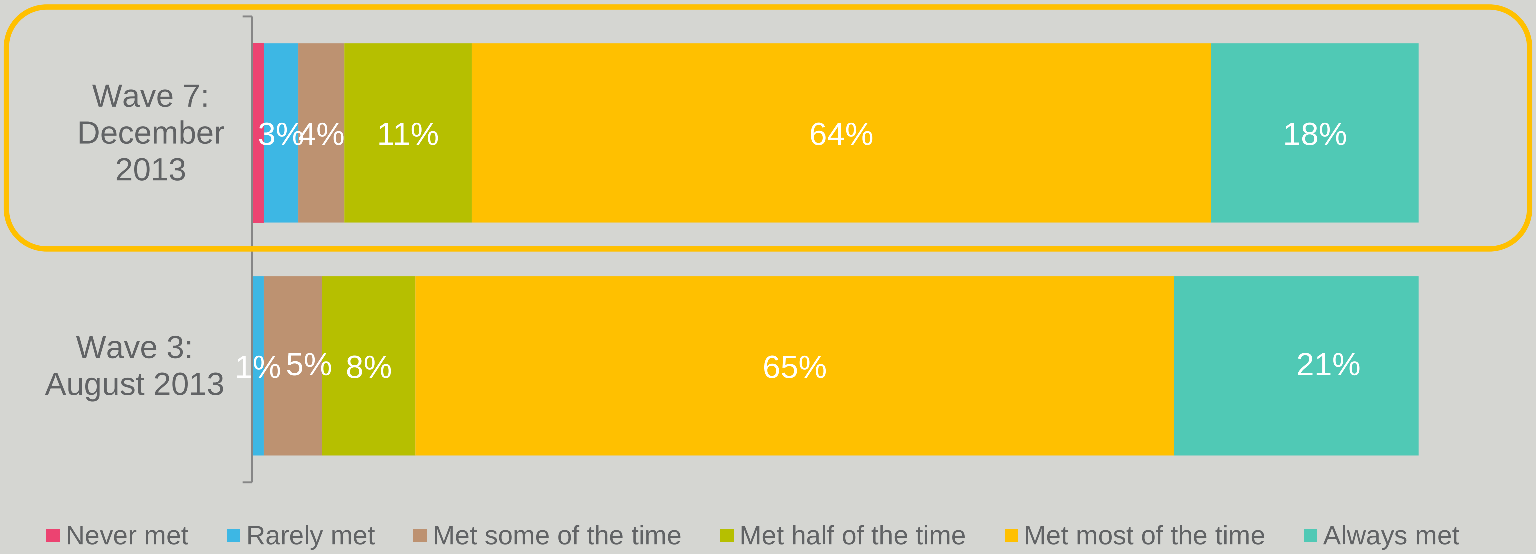
Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 3, N=502 and Wave 7, N=317

Freshness and Longevity: Cabbage

Expected to stay fresh for **10.3** days
(cf. 10.4 days Wave 3)

- Respondents stated that they expected cabbage to stay fresh for a week and a half after purchase, which was on trend with Wave 3.
- There was still a high level of expectation of cabbage freshness being met, yet this had decreased since Wave 3. Consumers indicated that on 82% of occasions freshness was at least met most of the time, if not always.

Expectations Met



Sample Wave 3, N=502 and Wave 7, N=317
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> ?

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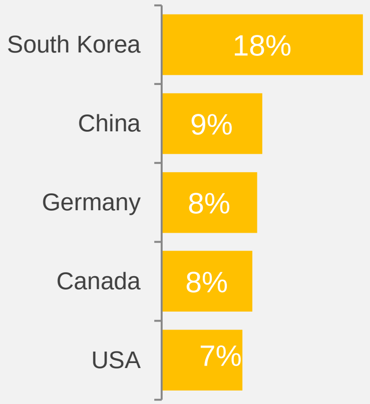
Trends: Cabbage

Cabbage Global NPDs
October - December 2013

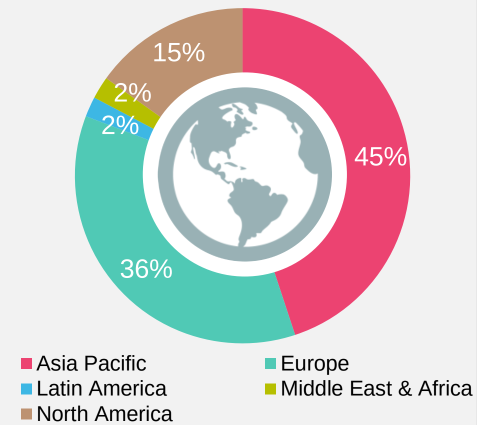
There were 463 global launches of products containing Cabbage as an ingredient between October to December. The majority of launches occurred in Asia Pacific and Europe. Health and convenience claims were common on products launched. Most launches were meals and meal centres.

463 Global Launches

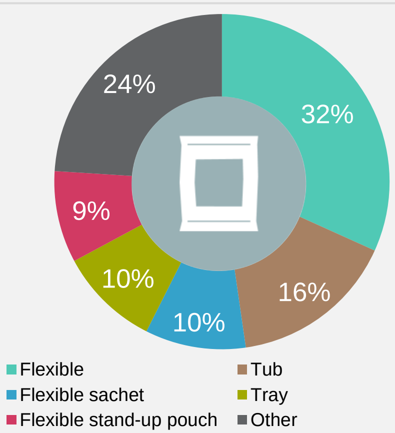
Country



Region



Top Pack Formats



Categories

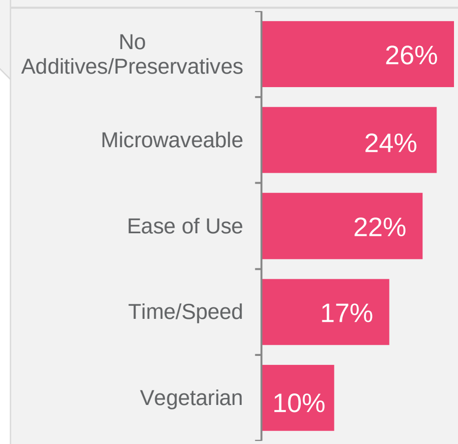
Meals 32%

Sauces 13%

Fruit & Vegetables 11%

Snacks 11%

Top Claims



Cabbage Product Launches:
Last 3 Months (October - December 2013)
Summary

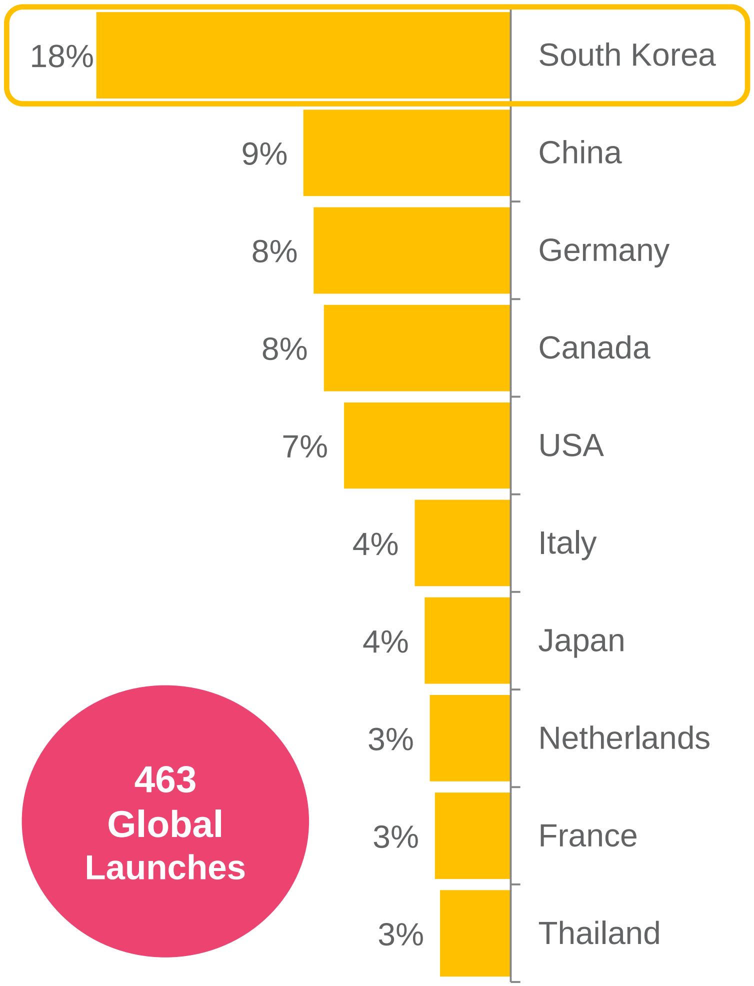
- There were 463 products containing cabbage as an ingredient were launched globally. This was a considerable increase from the number of launches made between June to August 2013.
- There were no Australian launches over the past 3 months.
- Launch regions were consistent with Wave 3, Asia Pacific, Europe and North America, 45%, 36% and 15%, respectively.
- Flexible packaging and tub formats were common packaging for cabbage launches.
- Meal and meal centres were the main category for launches (32%), as well as sauces (13%) and fruit & vegetables (13%).
- No additives/preservatives was the top claim utilised (26%), convenience claims were also common on products, including microwavable, ease of use and time/speed.
- The most innovative product launched was red cabbage with cinnamon and cranberries (see following pages).

Source: Mintel (2013)

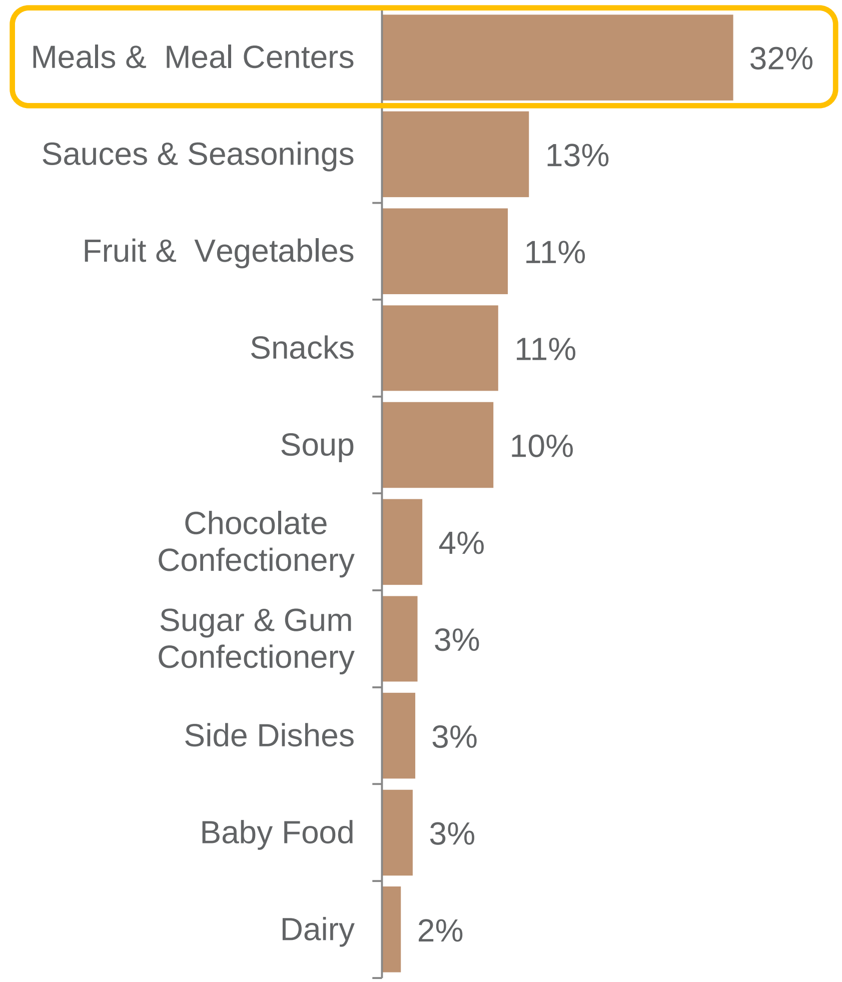
Cabbage Launches
Country & Categories

- South Korea was the primary country for cabbage launches in the last 3 months. This may be worthy of further investigation into export possibilities to increase the Australian vegetable export market.
- Meals and meal centres was the category with the greatest number of launches.

Top 10 Launch Countries



Top 10 Launch Categories

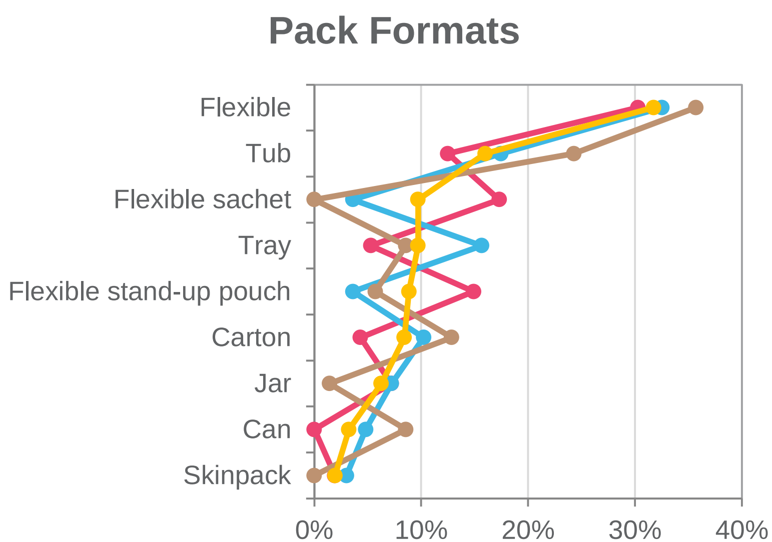


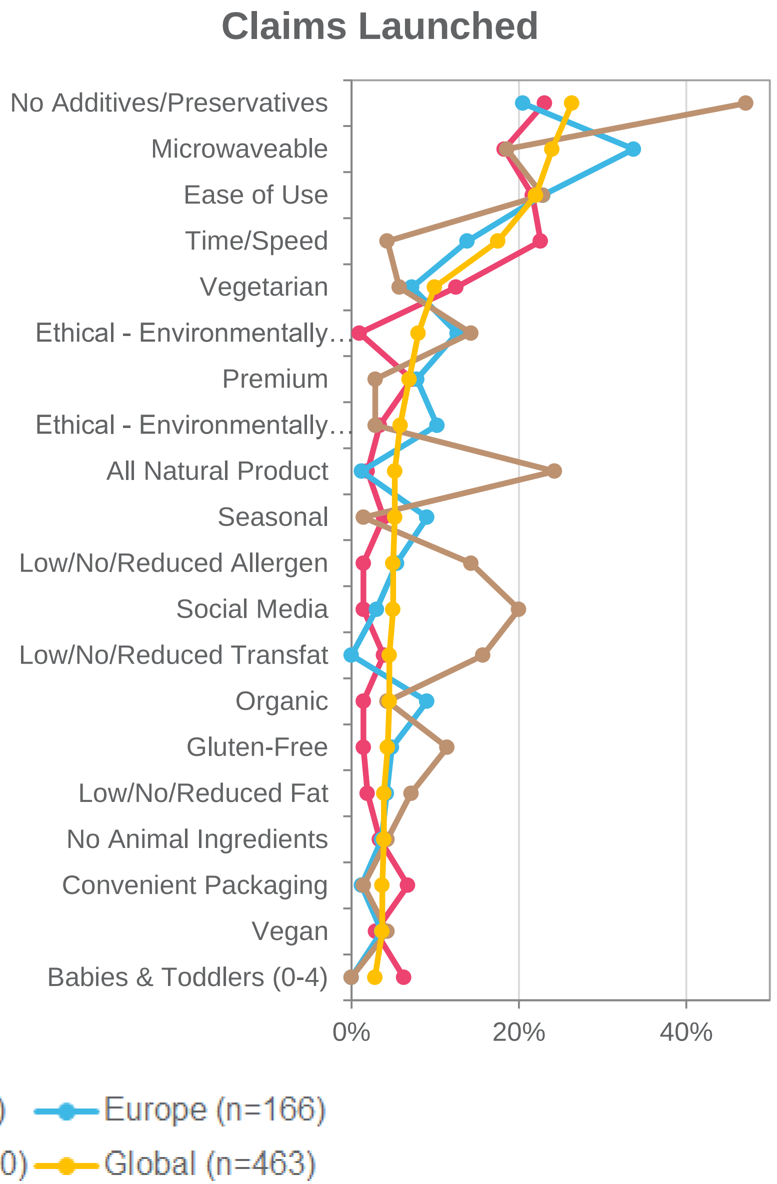
Number of Global Cabbage NPD for the L3M N=463

Cabbage Launches

Top Claims & Pack Formats Used

- Global trends indicated the use of no additives/preservatives claim, especially popular in North America.
- Europe wase more likely to use microwavable claims compared with other regions.
- Flexible packaging was the most common format used for cabbage products.





Number of Global cabbage NPD for the L3M N=302
Only regions with n >30 are displayed

Innovative Cabbage Launches:
L3M (June-August 2013)

AH Feest Favoriet Red Cabbage with Cinnamon & Cranberries (Netherlands)

AH Feest Favoriet Rodekool met Kaneel & Cranberry's (Red Cabbage with Cinnamon & Cranberries) is an oven-ready dish, which contains pieces of apple.The seasonal product is free from gluten and milk, and is tasty to eat with meat. It can be prepared in the microwave and retails in a 400g pack.

Claims:
Microwaveable, Seasonal, Low/No/Reduced Allergen, Ease of Use, Gluten-Free

Yamazaki Lunch Pack Kimchi Katsu & Mayonnaise Sandwich (Japan)

Yamazaki Lunch Pack Kimchi Katsu & Mayonnaise Sandwich is co-developed with Pickles Corporation. It contains kimchi and deep fried meat, seasoned with mayonnaise. The product retails in a 2 count pack featuring a Facebook link. Launched on December 1, 2013 with an RRP of 168 yen.

Claims:
Cobranded, Social Media

Innocent Noodle Pot Japanese Ramen (Ireland)

Innocent Noodle Pot Japanese Ramen is made using 100% non-airfreighted ingredients of udon noodles and shiitake mushrooms in a light miso sauce. The low fat product is microwavable, and each pot contains 2 portions of vegetables. The company claims to donate 10% of its profits to charity.

Claims:
No Additives/Preservatives, Social Media, Vegan, Ethical - Environmentally Friendly Package, Low/No/Reduced Fat, Microwaveable, Ethical - Charity, No Animal Ingredients, Vegetarian

Dole Chop Chop BBQ Ranch Salad Kit (Canada)

Dole Chop Chop BBQ Ranch Salad Kit with kale comprises thoroughly washed romaine lettuce, vegetables, crispy onions, tortilla strips and a BBQ ranch dressing. The product contains natural ingredients is free of trans fat and artificial preservatives,

Claims:
No Additives/Preservatives, Low/No/Reduced Transfat, Low/No/Reduced Allergen, Social Media, Gluten-Free

Source: Mintel (2013)

Innovative Cabbage Launches:
L3M (June-August 2013)

Lucky Foods Seoul Kimchi (USA)

Lucky Foods Seoul Kimchi is described as a fresh and healthy product with natural probiotics. The all natural product is free from MSG, gluten, and GMO. The kimchi retails in a 14-oz. pack, featuring Facebook information.

Claims:
No Additives/Preservatives, All Natural Product, Low/No/Reduced Allergen, GMO-Free, Gluten-Free, Social Media

Wegschaider Red Cabbage (Austria)

Wegschaider Feinschmecker Rotkraut (Red Cabbage) tastes like homemade. This microwaveable product retails in a 330g pack.

Claims:
Microwaveable

Müller Bio Primo Lactic Fermented Sour Cabbage Juice (Hungary)

Müller Bio Primo Savanyúkáposzta Lé Tejsavasan Erjesztett (Lactic Fermented Sour Cabbage Juice) has been repackaged with a new design. This organic certified product retails in a 500ml pack, which is FSC certified.

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

Vici Oriental Style Dumplings with Spicy Vegetables (Russia)

Vici Vostochnye Pel'meni s Ostrymi Ovoshchami (Oriental Style Dumplings with Spicy Vegetables) are made to a traditional oriental recipe with a 60% fresh vegetable filling and a 0.8mm thin dough. The pasteurised product is microwavable and retails in a 400g pack, featuring a Facebook logo.

Claims:
Social Media, Microwaveable

Source: Mintel (2013)

Innovative cabbage Launches:
L3M (June-August 2013)

Fresh Selections Cabbage Rolls (Canada)

Fresh Selections Cabbage Rolls now feature an improved recipe with a savoury all beef filling and a tangy tomato sauce. This fully cooked product contains no artificial flavours or colours. It is a high source of fibre and an excellent source of iron. The product retails in a microwavable 325g pack featuring a new look.

Claims:
No Additives/Preservatives, Microwaveable, High/Added Fiber

Bio+ Herbs Pickled Cabbage (Netherlands)

Bio+ Kruidenzuurkool (Herbs Pickled Cabbage) has been repackaged in a newly designed pack. It is naturally grown for pure enjoyment. The microwaveable product retails in a 520g pack featuring the Organic logo and ECO logo.

Claims:
Organic, Ethical - Environmentally Friendly Product, Microwaveable

Hengstenberg Mildessa 3 Minuten Classic Style Sauerkraut (Germany)

Hengstenberg Mildessa 3 Minuten Klassisch Weinsauerkraut (Classic Style Sauerkraut) has been reformulated and now comes with an improved recipe. This microwaveable product is fully cooked and seasoned and can be prepared in three minutes. The product, free from flavour enhancers and preservatives, retails in a practical 400g flavour-preserving pouch.

Claims:
No Additives/Preservatives, Convenient Packaging, Time/Speed, Microwaveable

Edeka Roughly Chopped Green Cabbage (Germany)

Edeka Grünkohl grob gehackt (Roughly Chopped Green Cabbage) is made from harvest fresh green cabbage which is gently deep frozen to preserve valuable vitamins and minerals. This product comprises selected leaves and retails in a 450g pack.

Claims:
N/A

Source: Mintel (2013)

Celery.

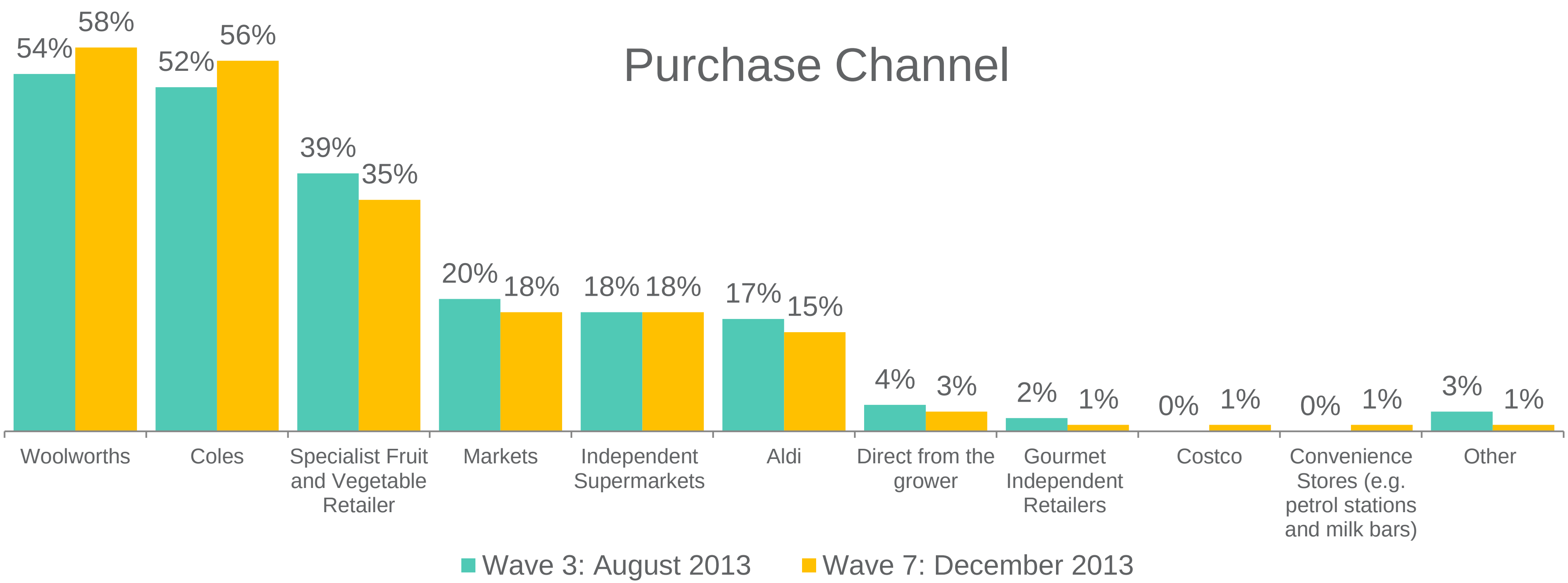
Purchase and Consumption Behaviour

Celery

Average Purchase **3.1** times per month (cf. 2.8 times per month Wave 3)

Average Consumption **9.3** times per month (cf. 8.5 times per month Wave 3)

- Purchase and consumption of celery had increased since Wave 3. This may be a natural seasonal increase in purchase behaviour with warmer months, leading to more salads and vegetable snacking behaviour.
- Purchase channels were relatively consistent between 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 and Wave 7, N=339

Average Spend & Price Sensitivity
Celery

⇛ The average consumer typically purchased **800g** of Celery, which is same purchase weight as Wave 3.

⇛ The average recalled last spend on Celery was **$2.80***, up $0.30 from Wave 3**.**

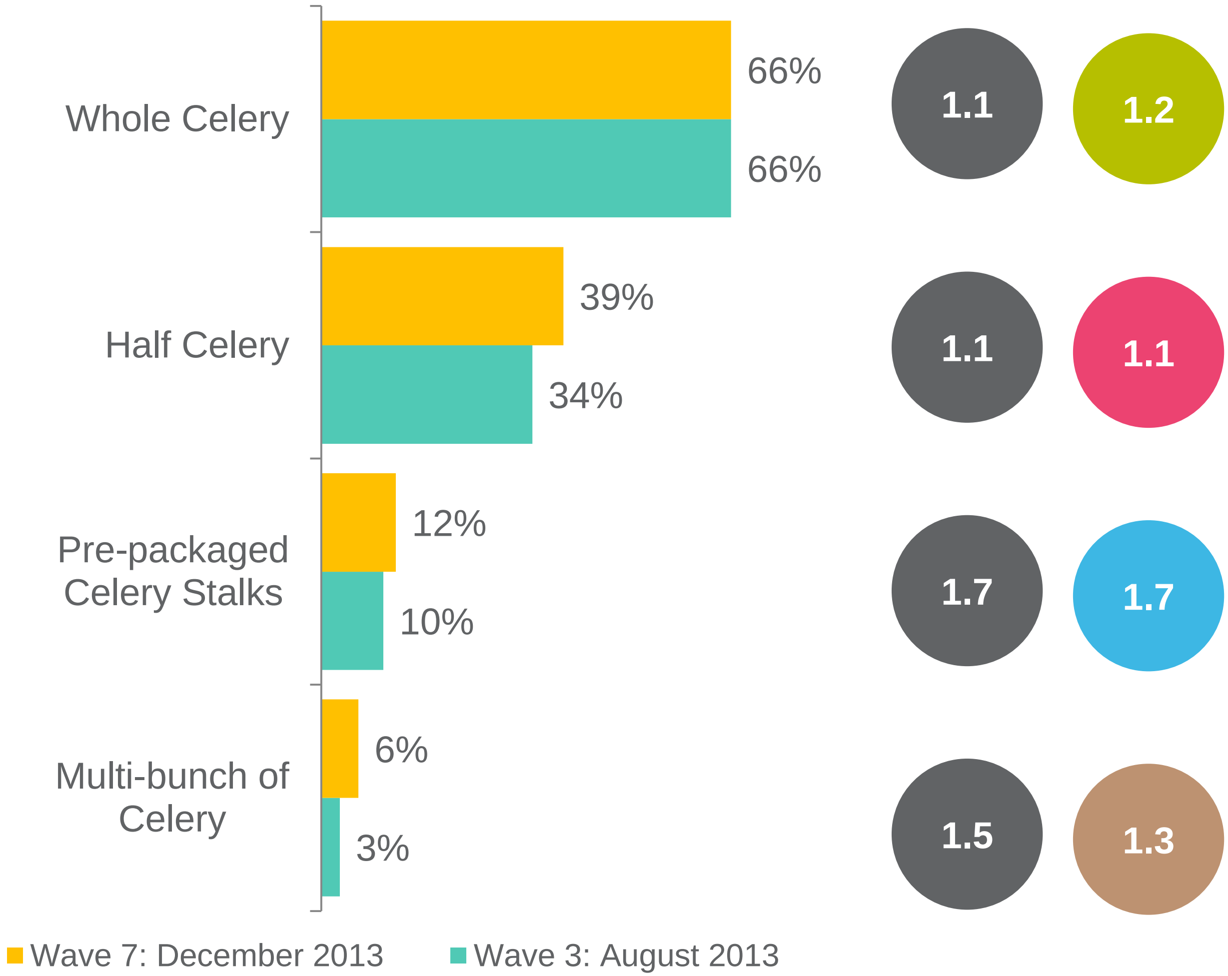
Wave 7 saw a significant increase in recalled last spend and a subsequent significant decrease in perceived value for money by the consumer.

⇛ Consumers perceived the average price for Celery as relatively good value for money **(6.1/10)** (Wave 3, 6.5*/10).

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 significantly higher score between waves @ 95% CI

Pack Formats Purchased
Celery

Amount Purchased if Selected (mean)
Wave 3 Wave 7

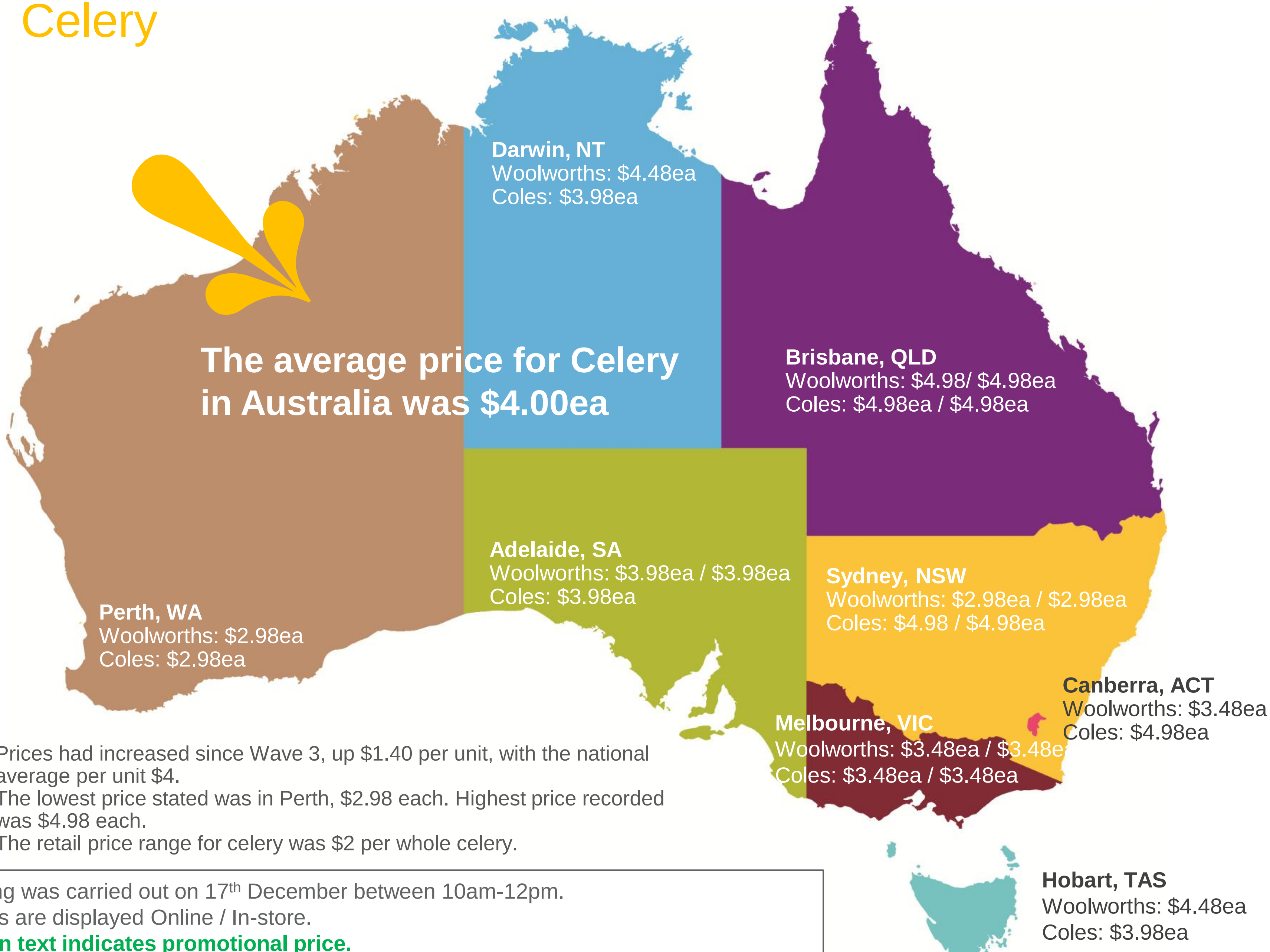


- Celery was primarily purchased in whole, single bunch formats, remaining consistent with Wave 3.
- There was a trend towards increased purchase of half bunch format.
- Amount purchased was consistent with Wave 3.

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

Online and In-store Commodity Prices

Celery



- Prices had increased since Wave 3, up $1.40 per unit, with the national average per unit $4.
- The lowest price stated was in Perth, $2.98 each. Highest price recorded was $4.98 each.
- The retail price range for celery was $2 per whole celery.

Pricing was carried out on 17th December between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates promotional price.

Spontaneous Awareness & Purchase

Celery

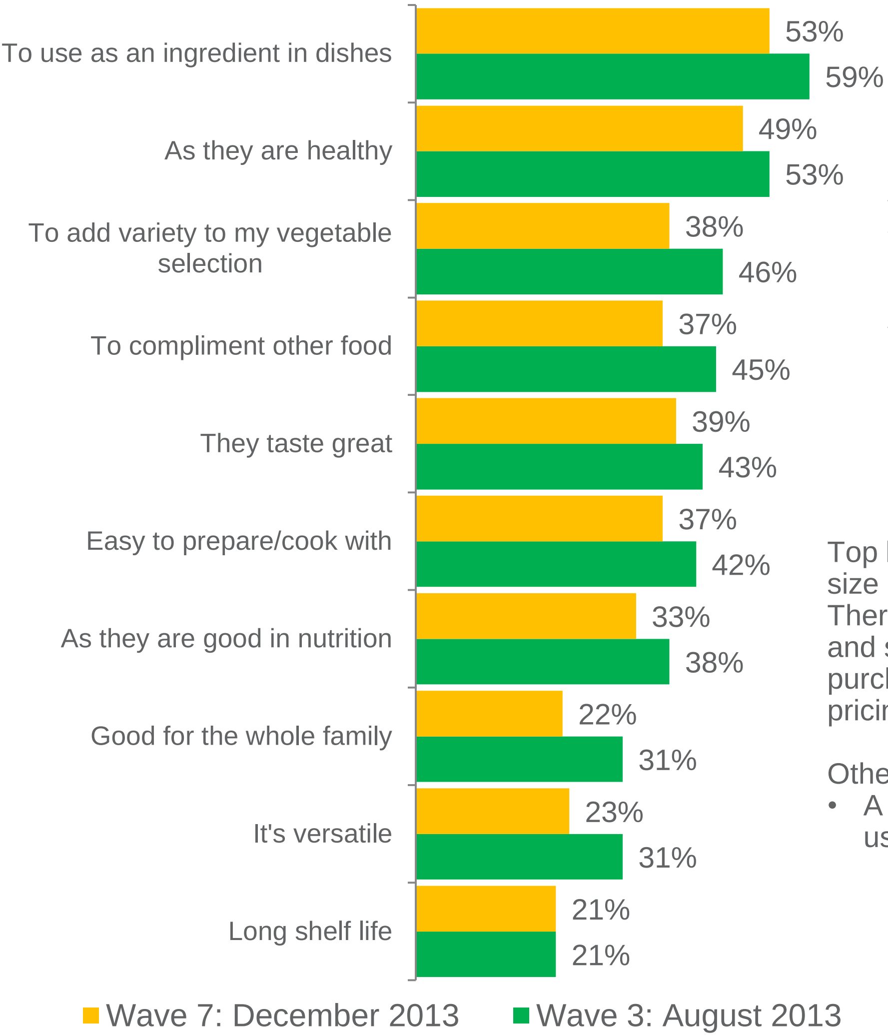
- Awareness of celery varieties remained low, with 88% of consumers not being able to recall a type. This low level of recall was similar to Wave 3 (90%).

- Of those respondents who stated a type of celery the most common suggestion was ‘normal’ or ‘regular’ celery indicating little knowledge of any specific varieties (names or differences).

Sample Wave 3, N=505 and Wave 7, N=339
Q6a. What varieties of <commodity> are you aware of? (unprompted)

Triggers & Barriers to Purchase
Celery

Triggers

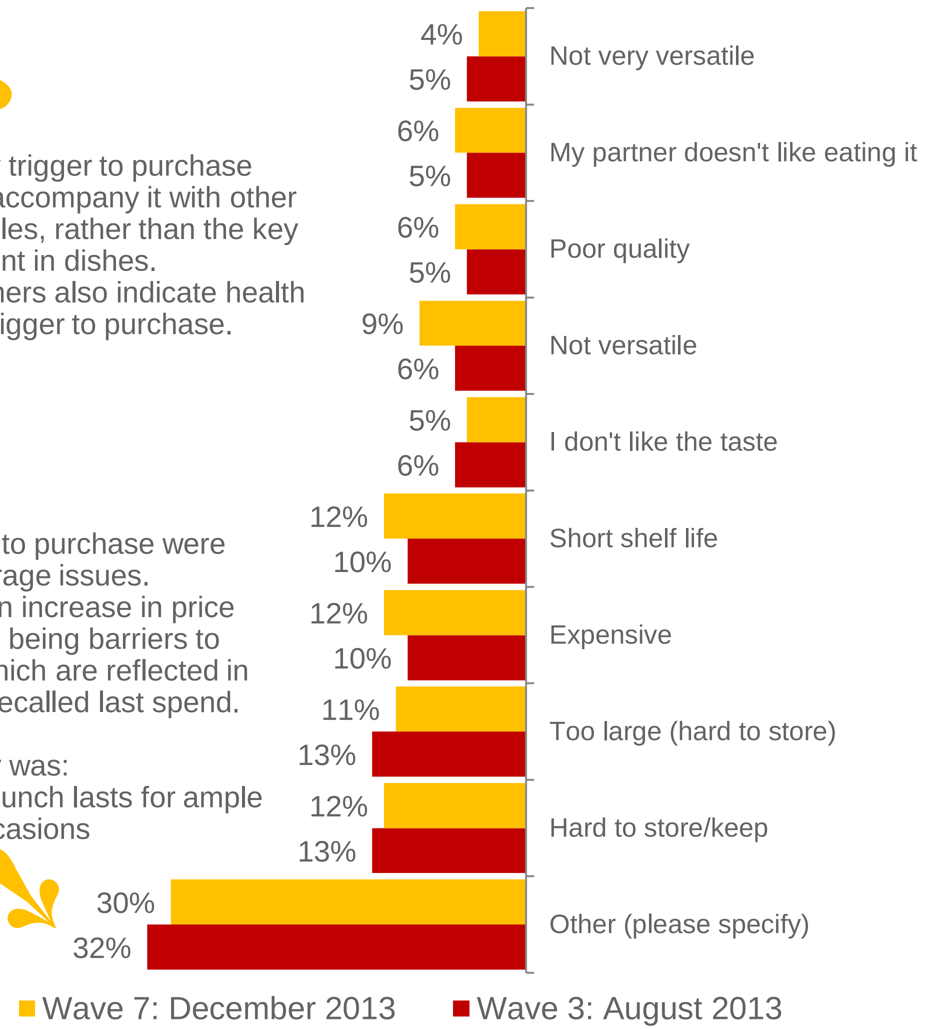


The key trigger to purchase was to accompany it with other vegetables, rather than the key ingredient in dishes. Consumers also indicate health was a trigger to purchase.

Top barriers to purchase were size and storage issues. There was an increase in price and shelf life being barriers to purchase, which are reflected in pricing and recalled last spend.

Other barrier was:
- A whole bunch lasts for ample usage occasions

Barriers

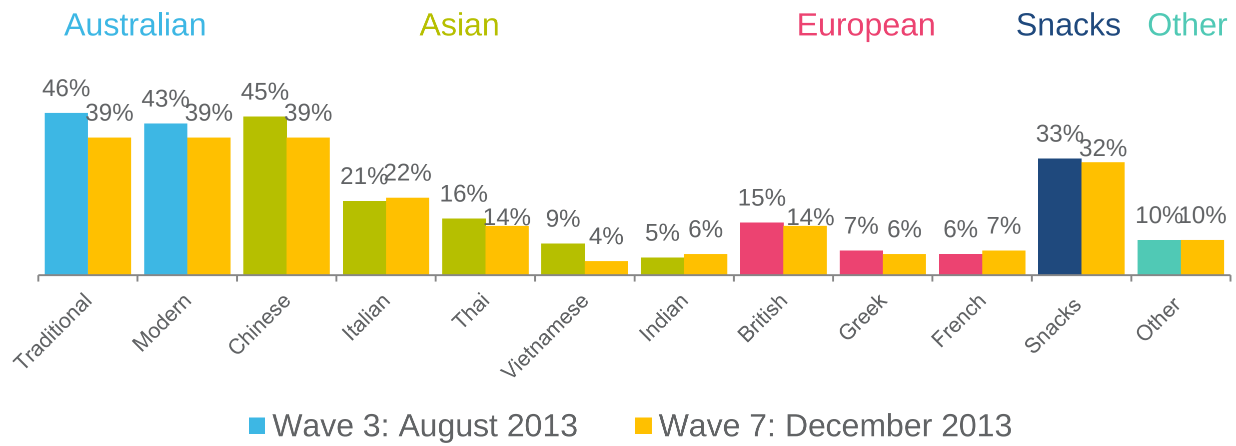


Sample Wave 3, N=505 and Wave 7, N=339
Q7. Which of the following reasons best describes why you purchase <commodity> ?
Q8. Which reason best describes why you don't buy <commodity> more often?

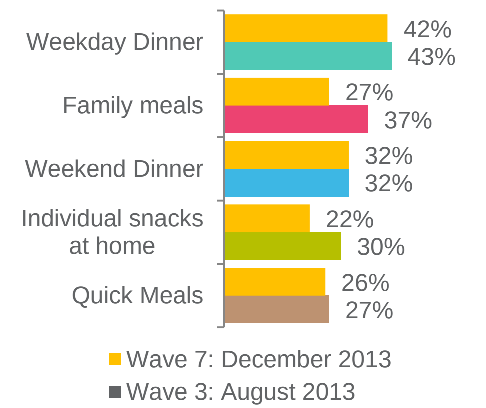
Cooking Preferences & Occasions: Celery

- Consumers were significantly more likely to use Celery with lettuce, compared with Wave 3.
- Seasonal changes are reflected in cooking styles, with an increase in raw consumption and decreased in soup as we enter warmer months.
- Cuisines cooked were relatively consistent with Wave 3, there was however a decrease in Australian and Chinse cuisine.

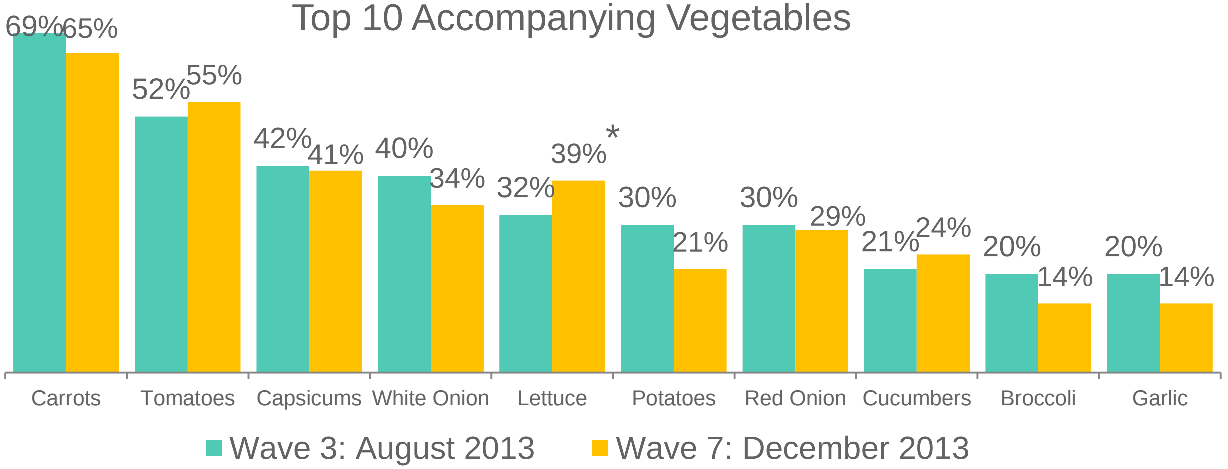
Typical Cuisine Cooked



Top 5 Consumption Occasions



Top 10 Accompanying Vegetables



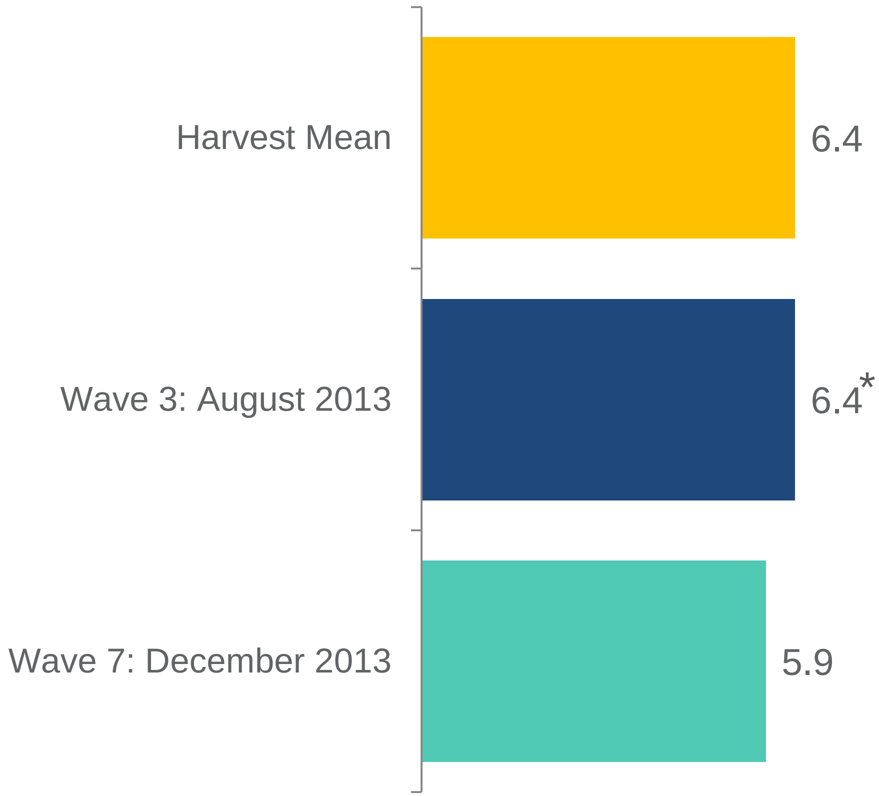
Top 10 Cooking Styles		
	Wave 3	Wave 7
Raw	61%	68%
Soup	56%	39%
Stir frying	50%	40%
Stewing	32%	28%
Sautéing	11%	11%
Steaming	10%	7%
Boiling	7%	6%
Blend	7%	5%
Shallow Frying	6%	7%
Other	6%	7%

Sample Wave 3, N=505 and Wave 7, N=339
Q9. How do you typically cook <commodity> ?
Q10. What cuisines do you cook/consume that use <commodity> ?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
Q11. Which of the following occasions do you typically consume/use <commodity> ?
* Indicates significantly higher score between waves @ 95% CI

colmar brunton.

Importance of Provenance

- Provenance of Celery was significantly less important to consumers in Wave 7 compared with Wave 3. With celery prices being higher during this wave compared with Wave 3, it may be that the importance of price outweighed the importance of provenance. This hypothesis may be explored in future studies.



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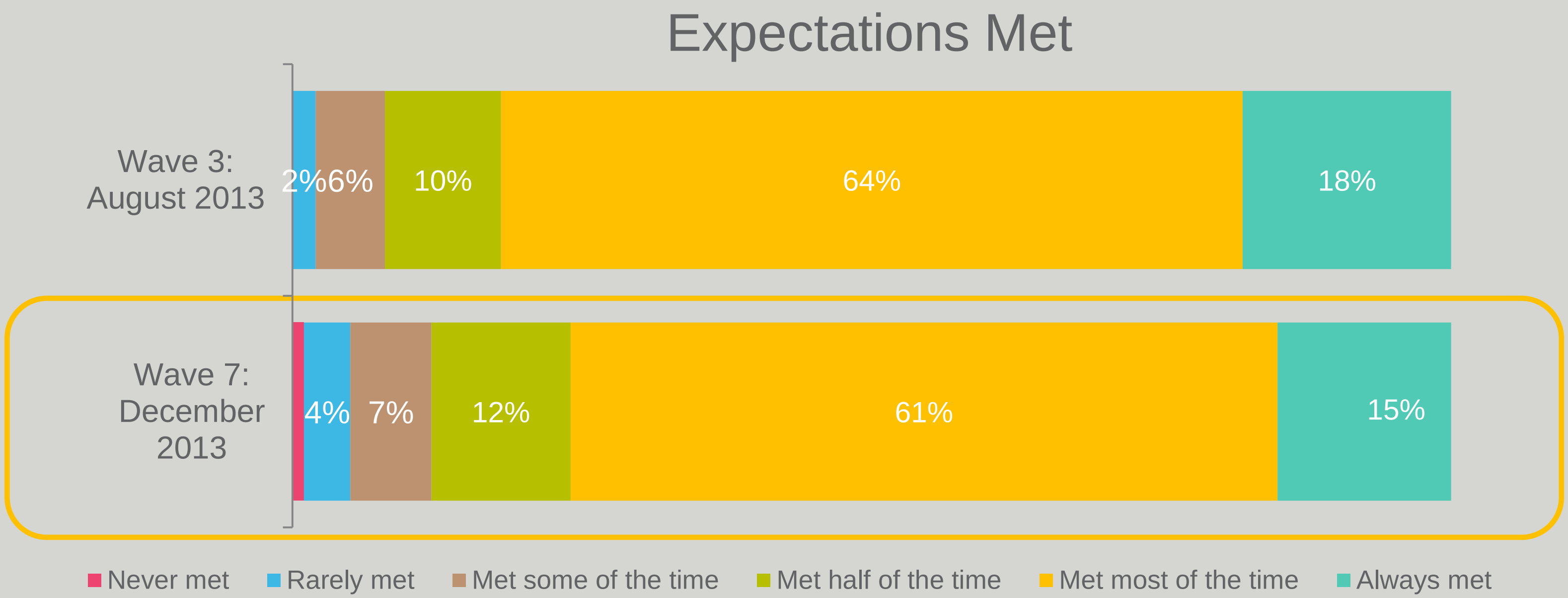
Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 3, N=505 and Wave 7, N=339
* Indicates significantly higher score between waves

Freshness and Longevity: Celery

Expected to stay fresh for **9.3** days (cf. 9.8 days in Wave 3)

- Expected freshness was relatively high, with celery expected to last over 9 days, however this is slightly lower than Wave 3.
- Expectations of freshness was less likely to be met, 76% met at least most of the time compared with Wave 3 (82%).
- The decrease in freshness and expectations may be due to heat or poor storage in Summer months.



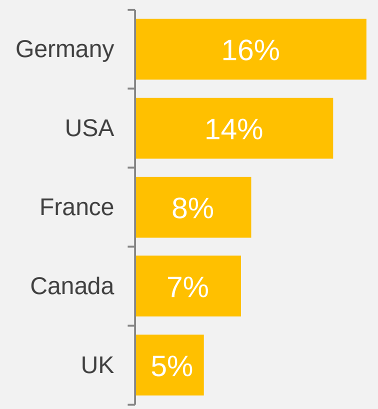
Sample Wave 3, N=505 and Wave 7, N=339
Q12. How long do you expect <commodity> to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy <commodity> ?

Celery

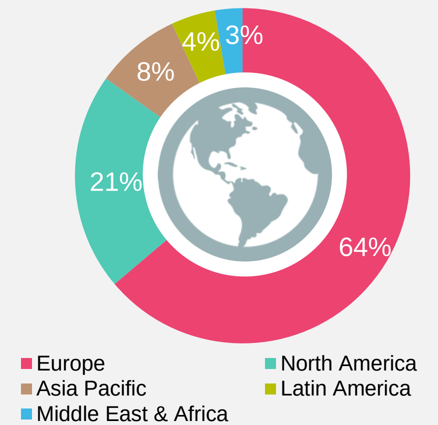
Celery Global NPDs
October – December 2013

Globally, there were 1432 celery products launched in the last three months, the majority of these launches occurred in Europe. Soup and meals were the most common categories launched. Key claims used were microwavable and no additive/preservatives.

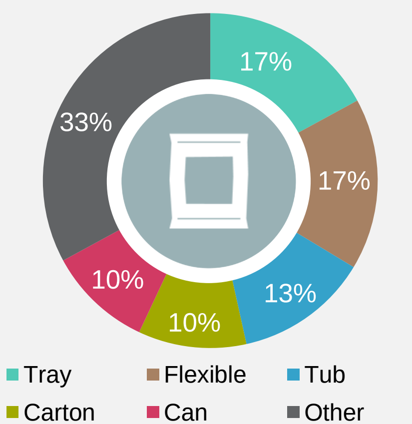
Country



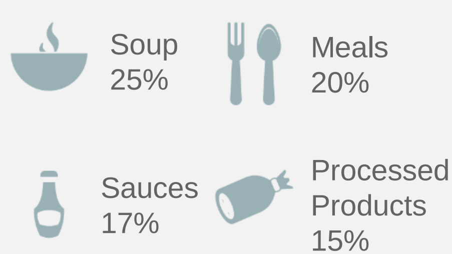
Region



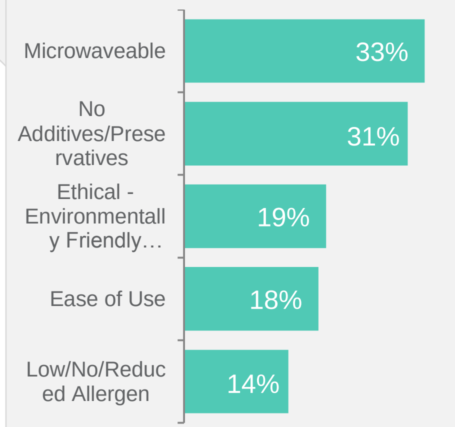
Top Pack Formats



Categories



Top Claims



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

- There was an increase in the number of launches over the last three months, 1432 globally, 1 of these occurred in Australia.
- The majority of launches occurred in Europe (64%), especially in Germany (16%). USA also had a large number of celery launches (14%).
- Flexible packaging (17%) and trays (17%) remained the most common pack format used over the last three months.
- There was an increase in the number of soup launches over the last three months (25%). Meals and meal centres (20%) and sauces and seasonings (17%) remained common category launches.
- Core claims used were health and convenience related; microwavable (33%), no additives (31%), microwavable (27%) and environmentally friendly (19%).
- The most innovative celery product launched was salted celery biscuits launched in China (other examples of these can be found in the following pages).

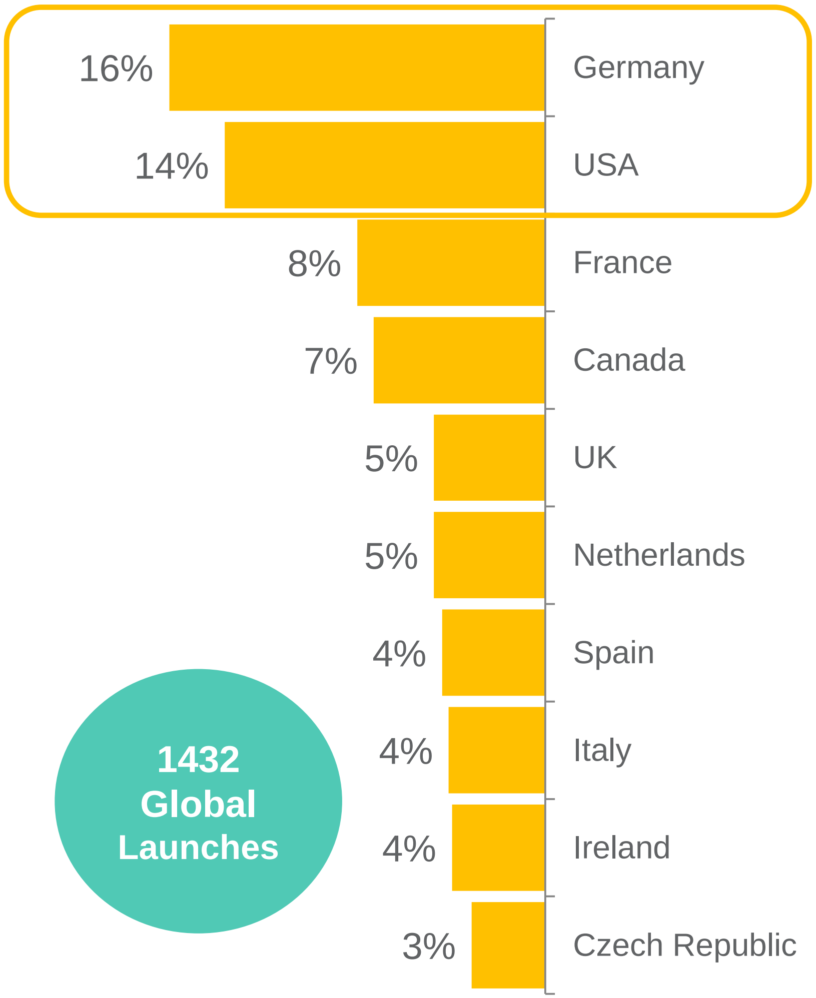
Source: Mintel (2013)

Celery SKUs

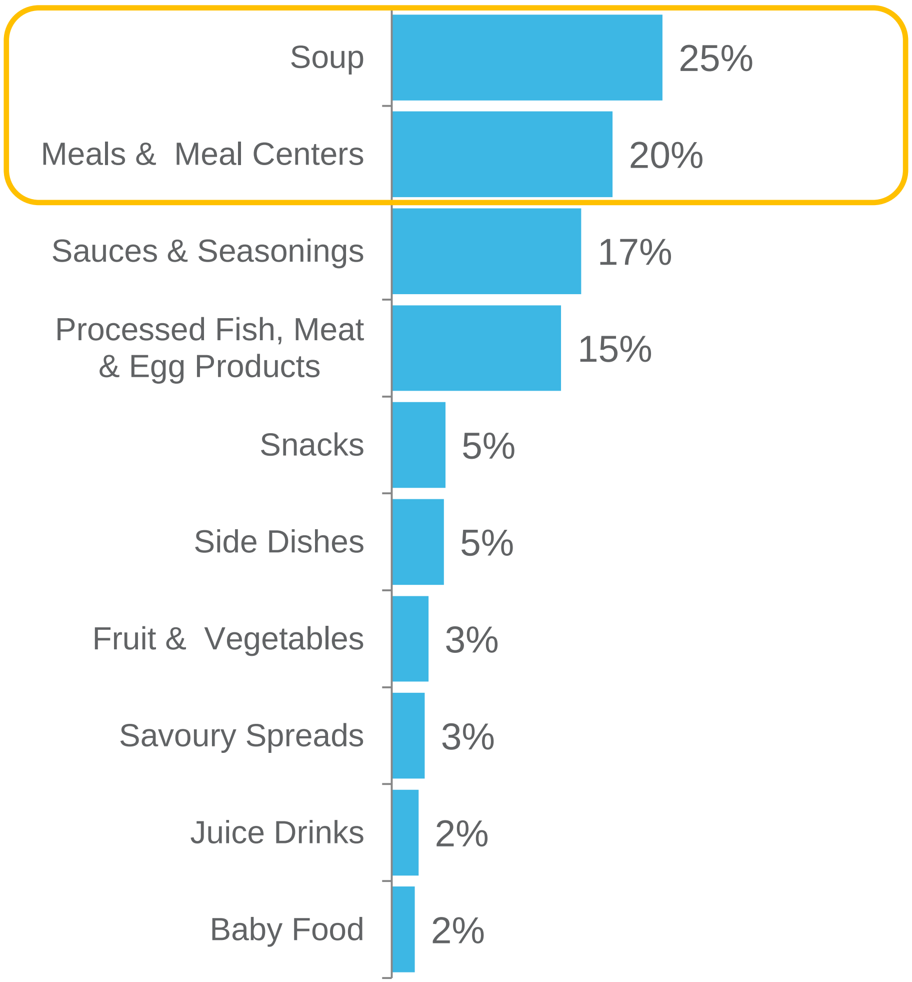
Country, Region & Categories

- Germany and USA were the key countries for celery launches over the last three months.
- Soup had the greatest number of category launches, which is likely due to seasonality and colder climates in the Northern Hemisphere.

Top Launch Countries



Top Launch Categories

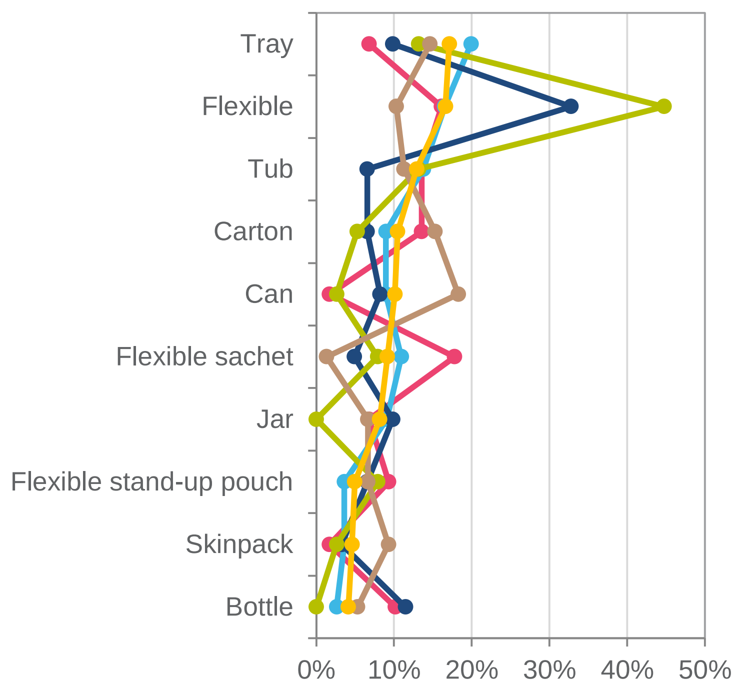


Number of Global Celery NPDs for the L3M N=1432

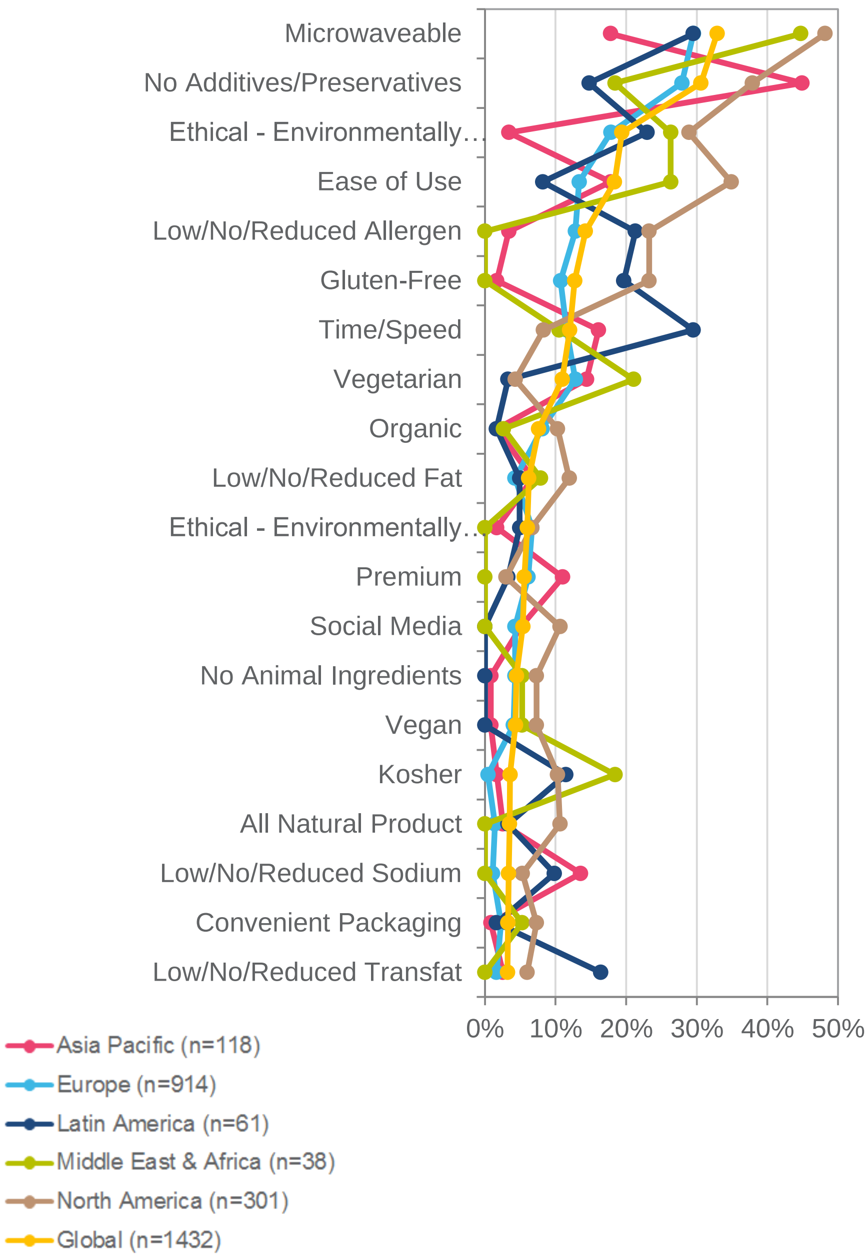
Celery SKUs
Top Claims & Pack Formats Used

- Flexible packaging was used globally for launches, particularly in Latin America and Middle East & Africa.
- Claims for products varied greatly between regions. Convenience claims were commonly used in North American and Middle East & Africa. Asia was more likely to use no additives/preservatives on their products.

Pack Formats Launched



Top Claims Launched



Number of Global Celery NPDs for the L3M N=948

Innovative Celery Launches:
L3M (October - December 2013)

Sisa Frozen Mixed Diced Frying Vegetables (Italy)

Sisa Misto per Soffritto (Frozen Mixed Diced Frying Vegetables) are now available. The product retails in a 150g reclosable pack.

Claims:
Convenient Packaging

Dingfu / Ding Fu Qian Fu Salted Celery Biscuits (China)

Dingfu / Ding Fu Qian Fu Xian Wei Qin Cai Bing Gan (Salted Celery Biscuits) are made with dehydrated celery, soy milk and flour. The biscuits are rich in fibre and free from cane sugar. This product retails in a 310g pack.

Claims:
High/Added Fiber, Low/No/Reduced Sugar

Insanely Good Fresh Creamy Carbonara Sauce (Ireland)

Insanely Good Fresh Creamy Carbonara Sauce was made in West Cork. This product is free from gluten and MSG, retailing in a 250g pack featuring the Facebook logo.

Claims:
No Additives/Preservatives, Social Media, Low/No/Reduced Allergen, Gluten-Free

Zurück zum Ursprung Organic Carrot, Apple & Celery Juice (Austria)

Zurück zum Ursprung Karotten Apfel Sellerie Saft (Organic Carrot, Apple & Celery Juice) is made from vegetables and fruit of the Marchfeld region and Styria, directly pressed and free from added sugar.

Claims:
GMO-Free, Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Low/No/Reduced Sugar, Organic, Carbon Neutral

Source: Mintel (2013)

Innovative Celery Launches:
L3M (October - December 2013)

Avoca To Go Seafood Chowder (Ireland)

Avoca To Go Seafood Chowder Soup has been reformulated with a new recipe. It retails in a 677g pack.

Claims:
On-the-Go

Selection Paquito 100% Pur Jus Bio Organic Salted Tomato & Vegetable Juice (France)

Selection Paquito 100% Pur Jus Bio Jus de Tomate et de Légumes Salés (Organic Salted Tomato & Vegetable Juice) has been repackaged with a new look featuring the EU leaf logo. This product retails in a 1L recyclable bottle which is sufficient for five servings.

Claims:
Organic, Low/No/Reduced Sugar, Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Ethical - Animal

Fresh Attitude Greek Salad Mix (Canada)

Fresh Attitude Greek Salad Mix is a prewashed mix with a tomatoes and olive Greek salad, pita bread and feta cheese. The product retails in a 454g resealable pack featuring the Facebook URL addresses.

Claims:
Convenient Packaging, Social Media

Albert Bio Vegetable Mix Seasoning (Czech Republic)

Albert Bio Ochucovací Zeleninová Smes (Vegetable Mix Seasoning) contains ingredients from organic agriculture and is free from monosodium glutamate, animal fats, preservatives, synthetic dyes and gluten. This product is said to be good for nature and people, and is retailed in a 35g pack.

Claims:
No Additives/Preservatives, Low/No/Reduced Allergen, Gluten-Free, Ethical - Environmentally Friendly Product, Organic

Source: Mintel (2013)

Innovative Celery Launches:
L3M (October - December 2013)

Cesare Buonamici Organic Garden Vegetable Sauce (Italy)

Cesare Buonamici Sapori dell'Orto Sugo Pronto Biologico (Organic Garden Vegetable Sauce) is a ready to use organic sauce prepared with only Italian organic vegetables and fresh tomatoes. It is free from GMO, pesticides and chemicals and is available in a 340g jar.

Claims:
Ease of Use, Organic, Ethical - Environmentally Friendly Product, GMO-Free

Ifantis Daily Country Sausages (Greece)

Ifantis Daily Loukanika Choriatika (Country Sausages) can be consumed cooked, fried or boiled. The product retails in a 380g packaging, containing two sausages and is packed with Freshpress technology.

Claims:
N/A

Terra & Vita Vegetable Minestrone (Italy)

Terra & Vita Le Zuppe Belle e Pronte Minestrone di Verdure (Vegetables Minestrone) is a 100% vegetable, ready to eat soup with no preservatives. This microwaveable product is made with fresh vegetables, requires just four minutes to prepare and retails in a 620g pack, providing two portions.

Claims:
Economy

Specially Selected Aberdeen Angus Cottage Pie (UK)

Specially Selected Aberdeen Angus Cottage Pie contains Aberdeen Angus minced beef in a rich red wine gravy, topped with buttery mash made with single cream. This artificial colour and flavour free product is made with 100% British beef and retails in a 700g recyclable pack.

Claims:
Ethical - Environmentally Friendly Package, No Additives/Preservatives, Premium, Microwaveable

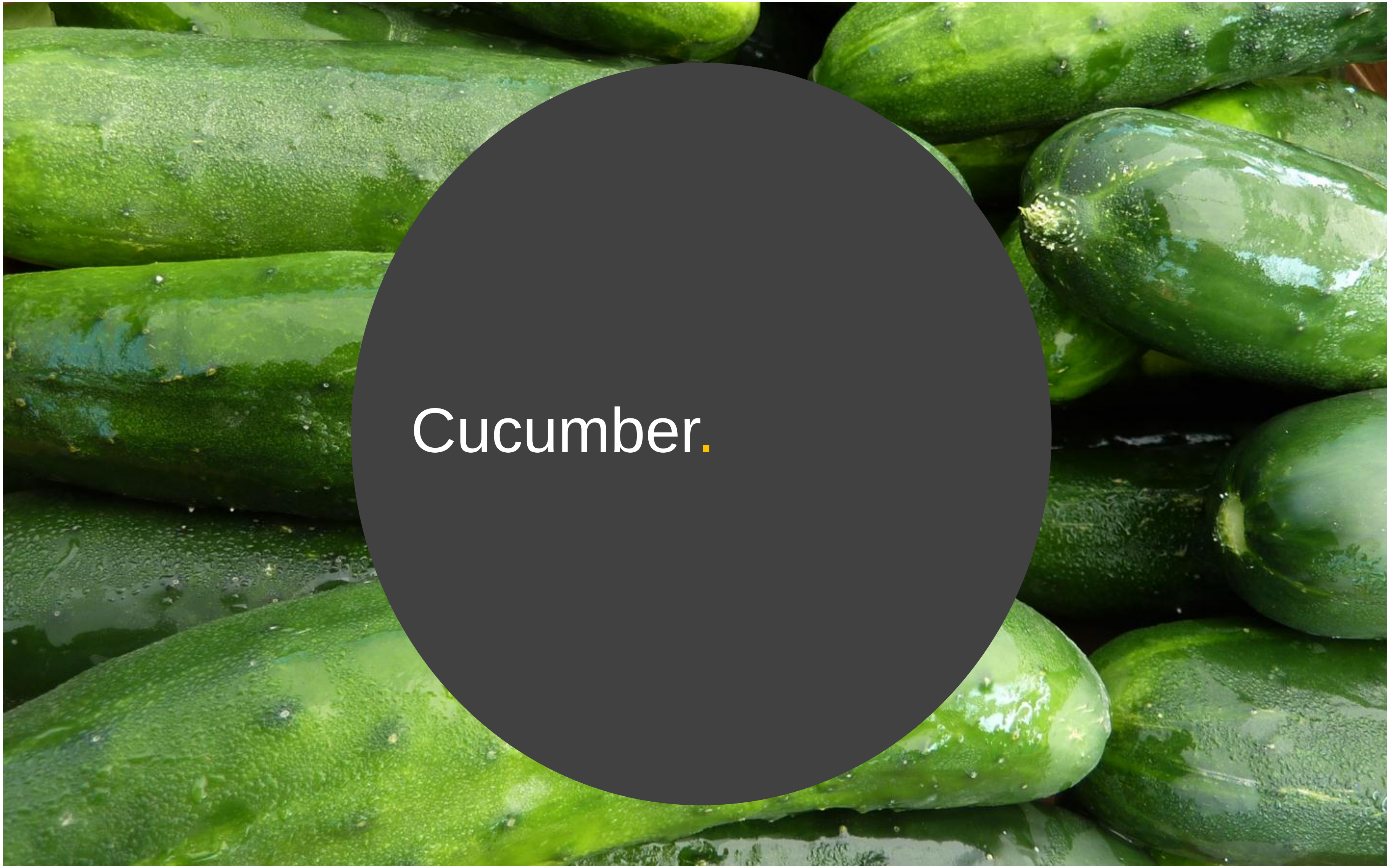
Source: Mintel (2013)

Australian Celery Launches:
L3M (October - December 2013)

Beanfields Salsa Flavoured Bean & Rice Chips

Beanfields Salsa Flavoured Bean & Rice Chips are described as tortilla chips with award winning taste. The chips are made from a blend of black and navy beans and long-grain rice, and are free from the eight most common food allergens.

Claims:
All Natural Product, Low/No/Reduced Allergen, GMO-Free, High/Added Fiber, Vegan, Kosher, Low/No/Reduced Fat, Ethical - Environmentally Friendly Product, Gluten-Free, No Animal Ingredients, High Protein, Ethical - Human



Cucumber.

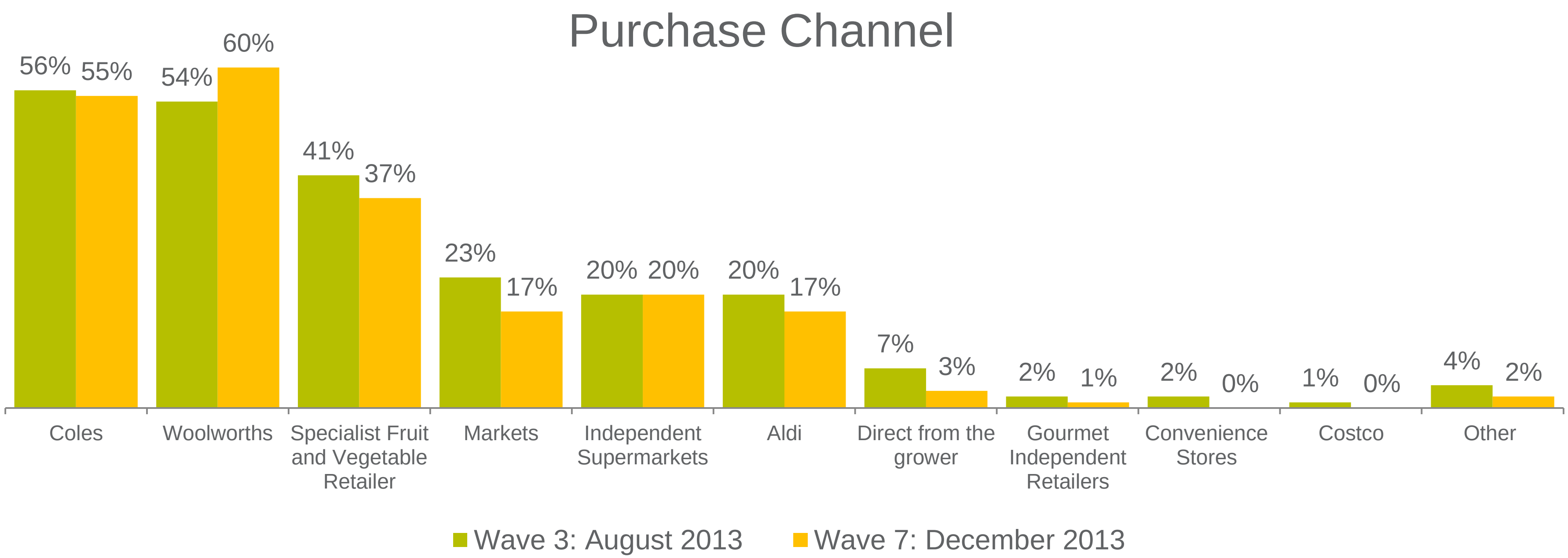
Purchase and Consumption Behaviour

Cucumber

Average Purchase **4.9** times per month (cf. 4.4 times per month Wave 3)

Average Consumption **13.3*** times per month (cf. 12.1 times per month Wave 3)

- Consumption frequency was significantly higher compared with Wave 3, which may be the result of warmer months, with cucumber perceived to be a summer vegetable.
- There was no significant differences in purchase channels, although a trend towards increased purchase at Woolworths and a decreased purchase from markets.



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 and Wave 7, N=352
* Indicates significantly higher score between waves

Average Spend & Price Sensitivity

Cucumber

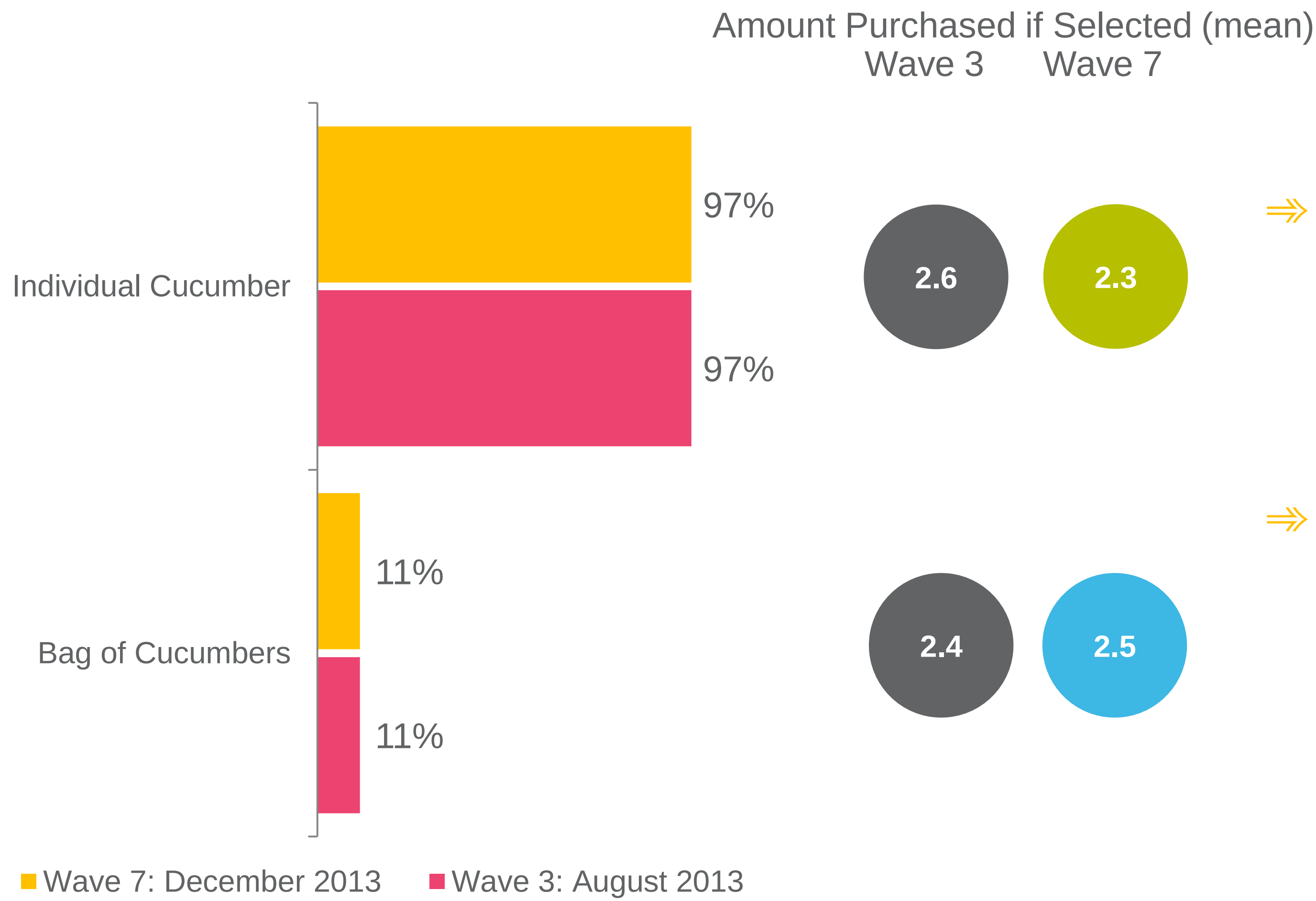
⇛ The average consumer typically purchased **700g** of cucumber, the same purchase weight as Wave 3.

⇛ Consistent with Wave 3, the average recalled last spend on Cucumber was **$2.80**.

⇛ Consumers perceived the average price for cucumber as good value for money **(6.2/10),** which is on trend with Wave 3 (6.3/10).

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 and Wave 7, N=352

Pack Formats Purchased
Cucumber



- Purchase formats were consistent with Wave 3, where individual cucumbers remained the primary format purchased.
- Amount purchased remained on trend with Wave 3, with an average of 2 cucumbers being purchased in one purchase occasion.

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

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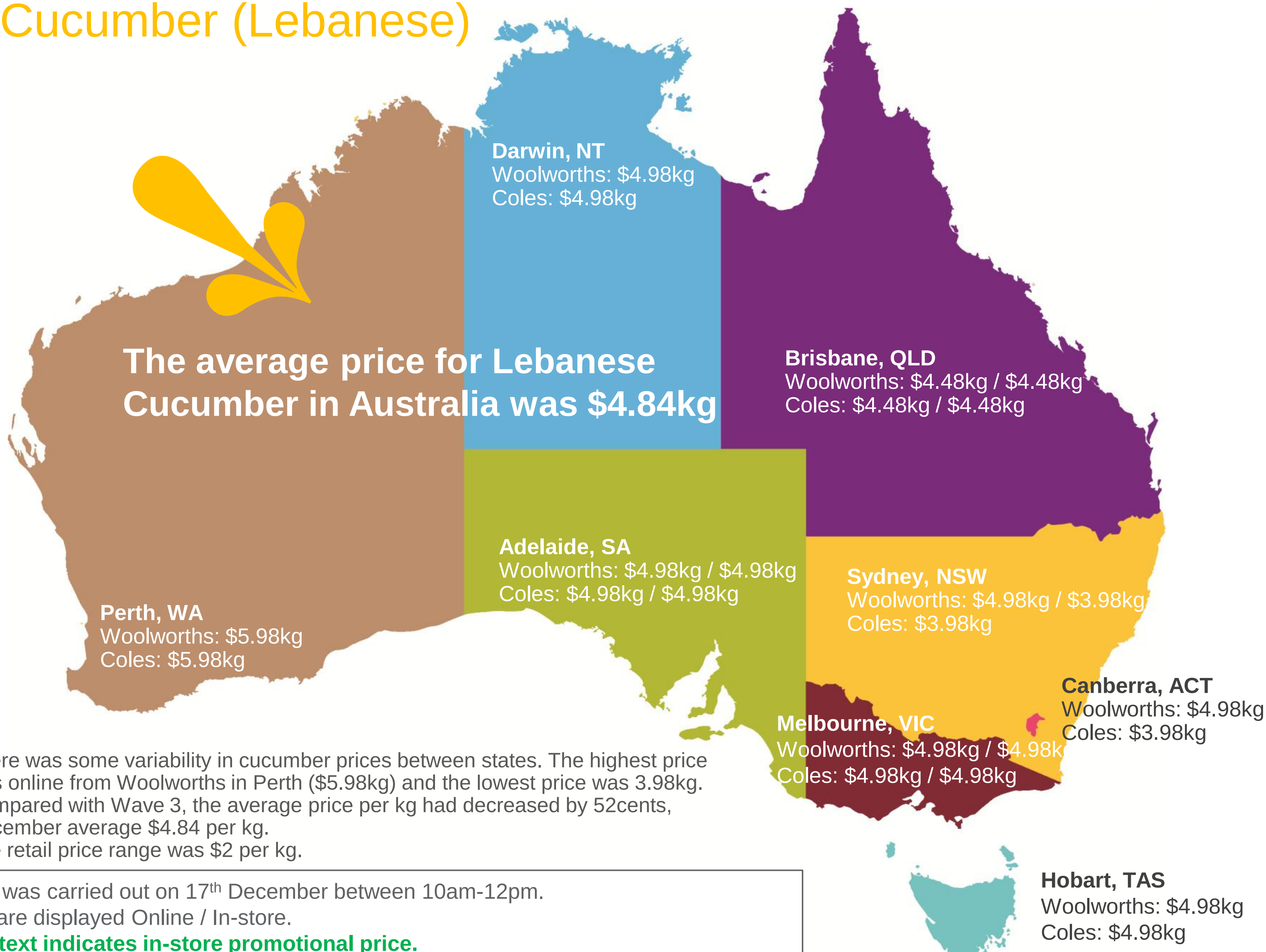
Online and In-store Commodity Prices

Cucumber (Lebanese)



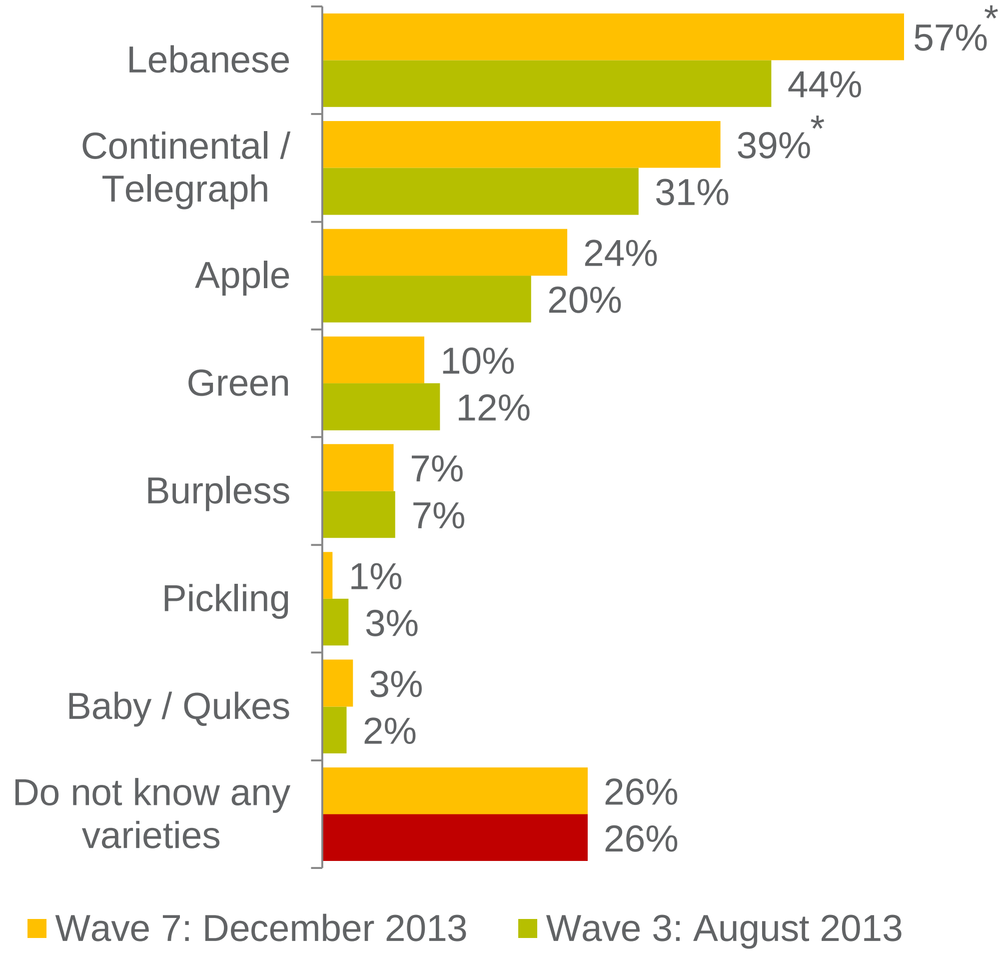
- There was some variability in cucumber prices between states. The highest price was online from Woolworths in Perth ($5.98kg) and the lowest price was 3.98kg.
- Compared with Wave 3, the average price per kg had decreased by 52cents, December average $4.84 per kg.
- The retail price range was $2 per kg.

Pricing was carried out on 17th December between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates in-store promotional price.

Spontaneous Awareness & Purchase

Cucumber

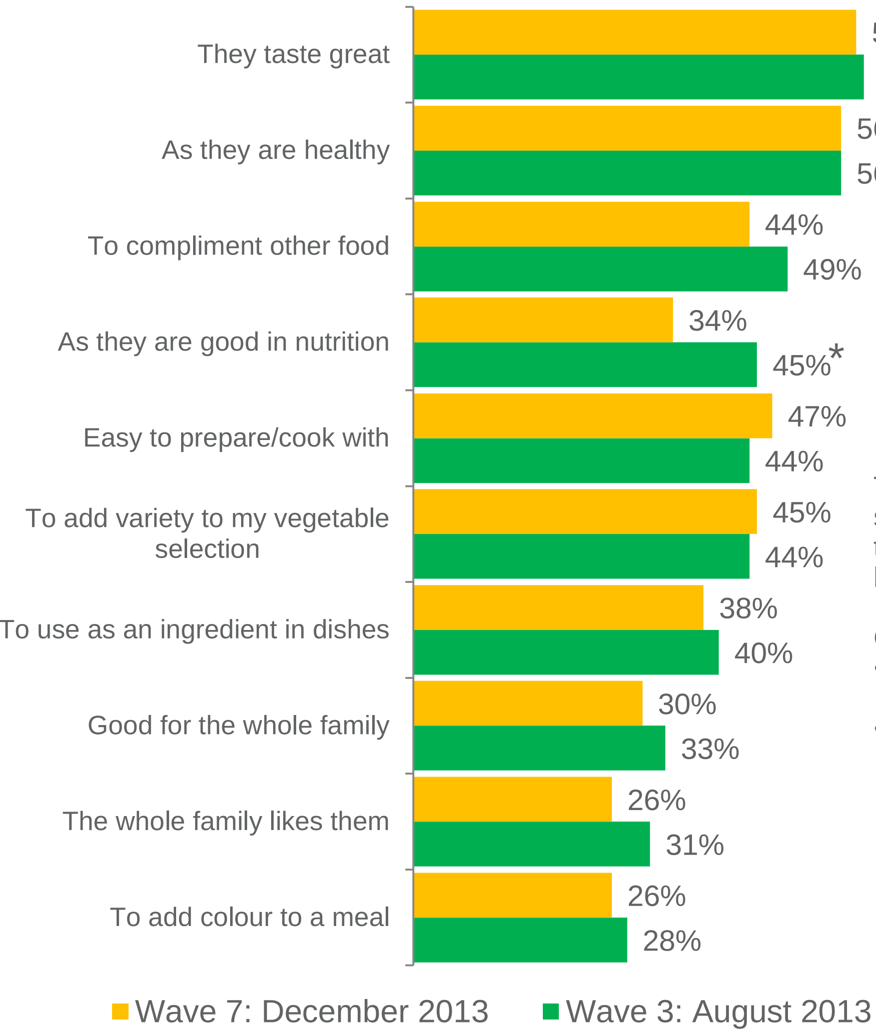
- There was comparably high awareness of multiple varieties of cucumbers. Compared with Wave 3 there was a significant increase in awareness of Lebanese and Continental cucumbers.
- Approximately one quarter of respondents were still unable to recall a type of cucumber (consistent with Wave 3).



Sample Wave 3, N=503 and Wave 7, N=352
Q6a. What types/varieties of <commodity> are you aware of? (unprompted)
* Indicates significantly higher score between waves @ 95% CI

Triggers & Barriers to Purchase
Cucumber

Triggers

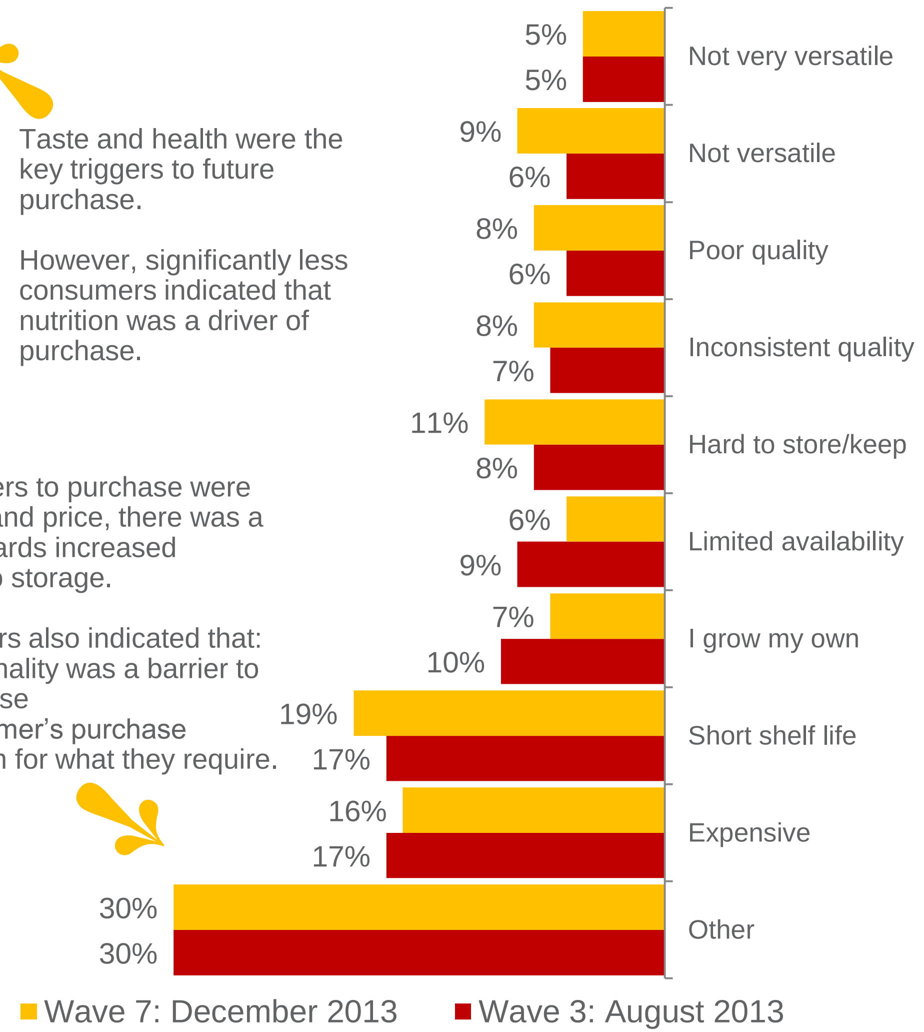


- Taste and health were the key triggers to future purchase.
- However, significantly less consumers indicated that nutrition was a driver of purchase.

Top barriers to purchase were shelf life and price, there was a trend towards increased barriers to storage.

Consumers also indicated that:
- Seasonality was a barrier to purchase
- Consumer's purchase enough for what they require.

Barriers

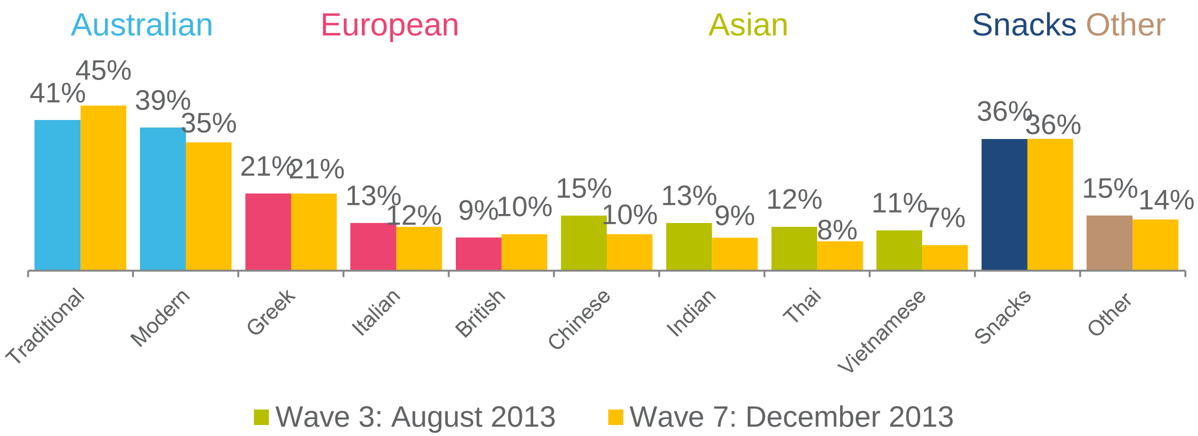


Sample Wave 3, N=503 and Wave 7, N=352
Q7. Which of the following reasons best describes why you purchase <commodity> ?
Q8. Which reason best describes why you don't buy <commodity> more often?

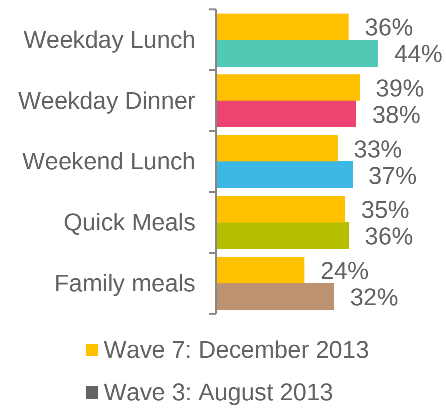
Cooking Preferences & Occasions: Cucumber

- Cooking styles, cuisines and accompanying vegetables were on trend with Wave 3. Raw remained the most common consumption method.
- Australian cuisine remained the preferred style, snacks were also popular.
- Weekday dinner was the top consumption occasion, compared with Weekday lunch from Wave 3.

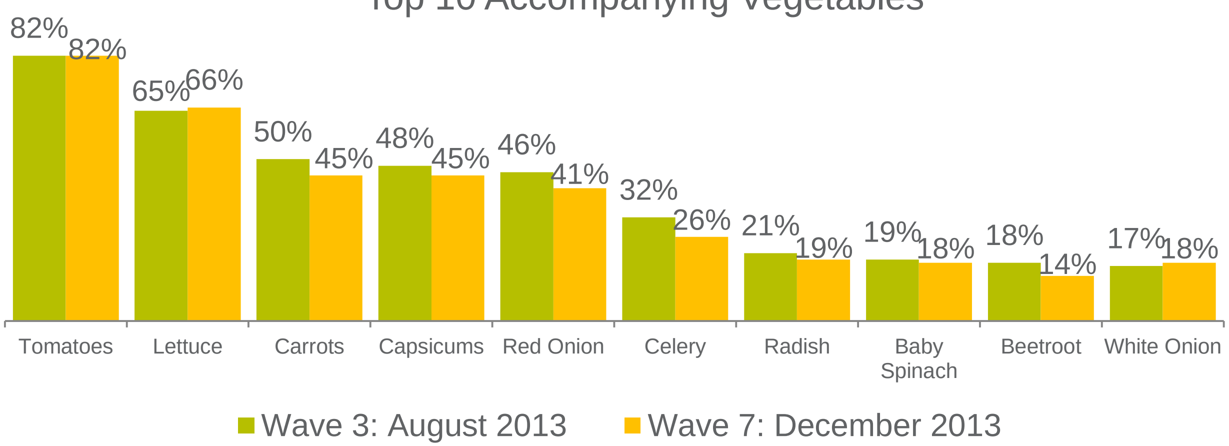
Typical Cuisine Cooked



Top 5 Consumption Occasions



Top 10 Accompanying Vegetables



Top 10 Cooking Styles		
	Wave 3	Wave 7
Raw	80%	84%
Other	15%	12%
Stir frying	13%	9%
Steaming	5%	3%
Soup	5%	2%
Blend	3%	3%
Microwave	2%	2%
Roasting	2%	2%
Grilling	2%	2%
Baking	2%	2%

Sample Wave 3, N=503 and Wave 7, N=352
Q9. How do you typically cook <commodity> ?
Q10. What cuisines do you cook/consume that use <commodity> ?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
Q11. Which of the following occasions do you typically consume/use <commodity> ?

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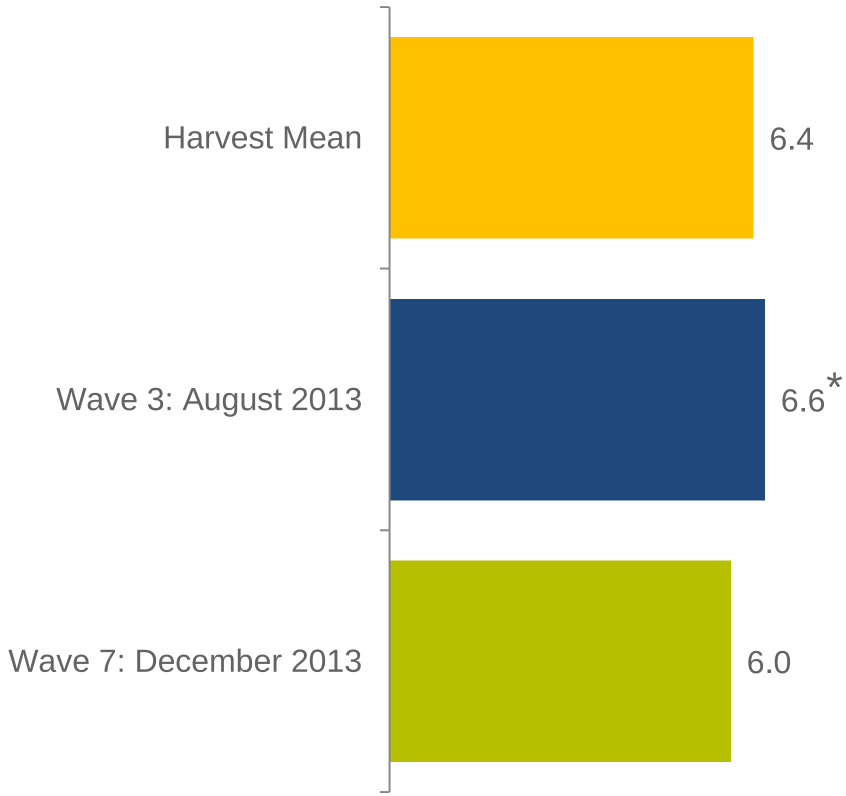
Importance of Provenance

- Provenance for Cucumber was significantly less important compared with Wave 3. This may be a result of cucumbers currently being in season and the potential abundance of local compared to imported varieties. 1

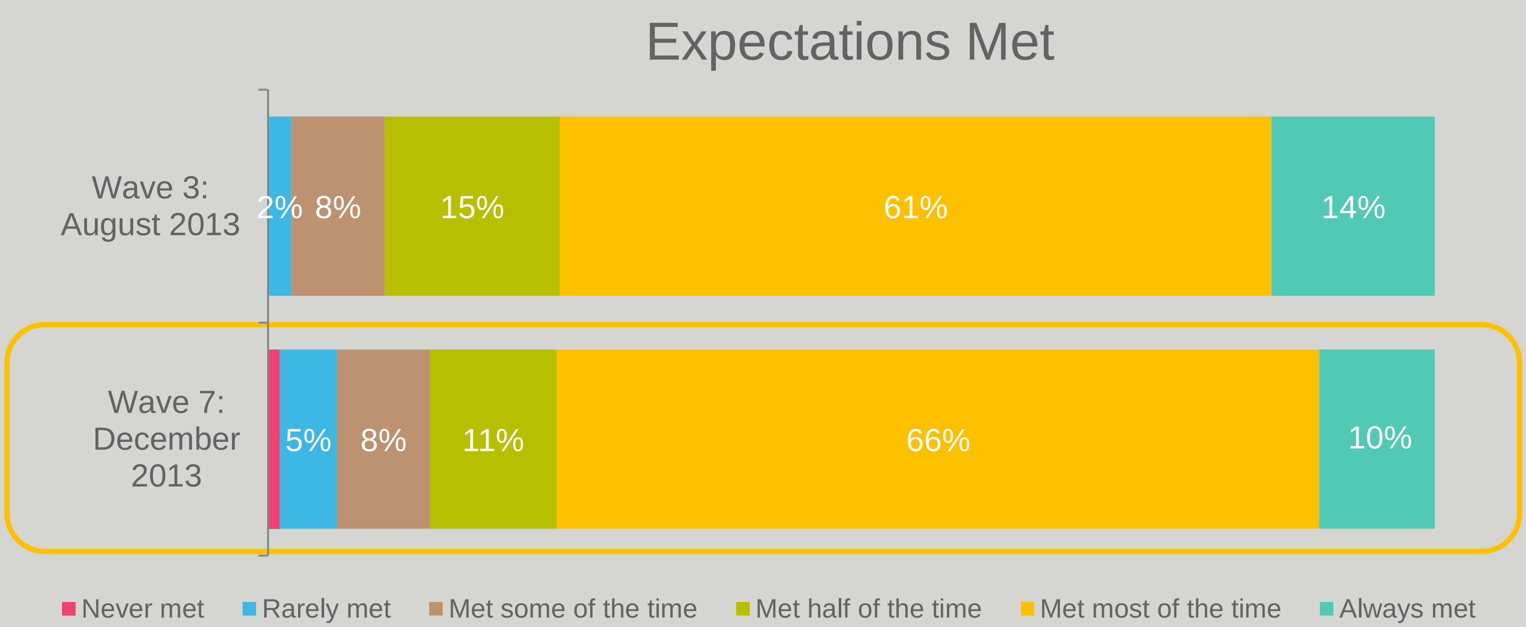


Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 3, N=503 and Wave 7, N=352
* Indicates significantly higher score between waves @ 95% CI

Freshness and Longevity: Cucumber

Expected to stay fresh for **7.7** days (cf. 7.5 days Wave 3)

- Expectations of freshness were on trend with Wave 3. Longevity of cucumber freshness was just over a week.
- Over three quarters of respondents indicated that this freshness was met at least most of the time, which was consistent with Wave 3.



Sample Wave 3, N=503 and Wave 7, N=352
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> ?

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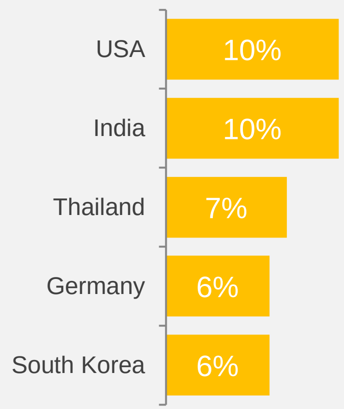
Trends: Cucumber

Cucumber Global NPDs

October – December 2013

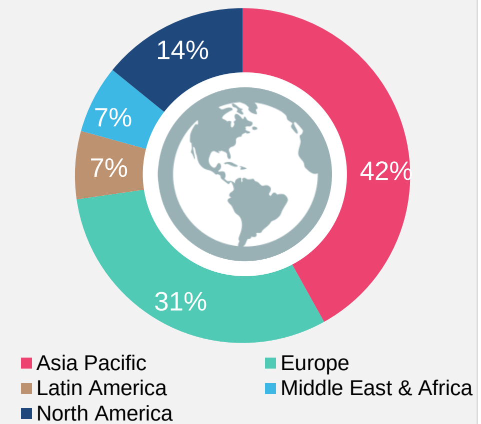
198 products containing cucumber were launched over the past three months. The majority of launches occurred in Asia Pacific and Europe. Common packaging used were bottle and tub formats.

Country

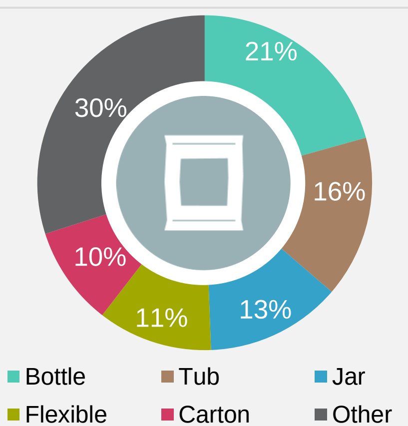


198 Global Launches

Region



Top Pack Formats



Categories

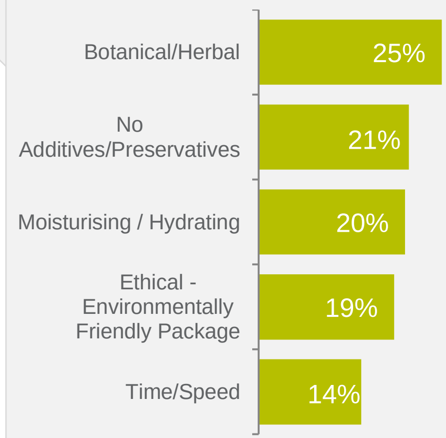
Skincare 29%

Meals 17%

Savoury Spreads 12%

Sauces 11%

Top Claims



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

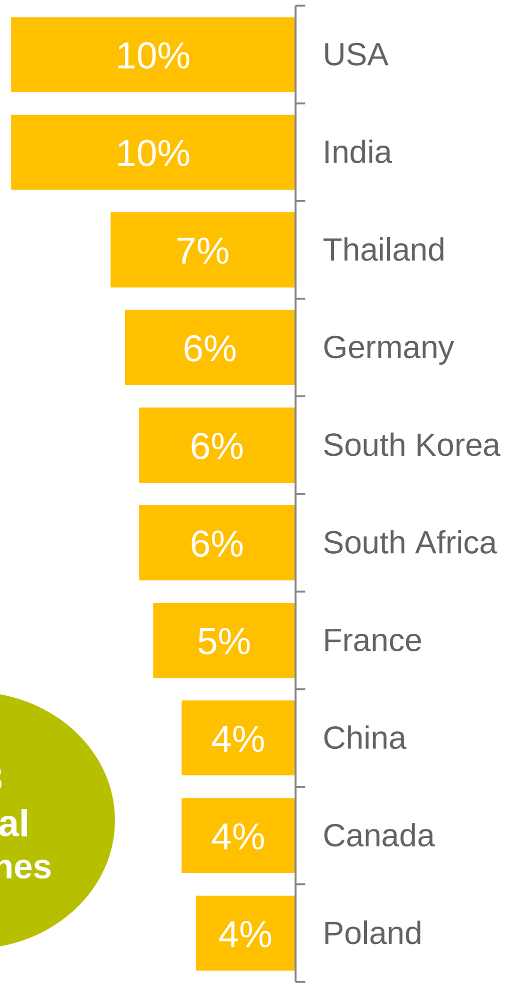
- The number of cucumber product launched was 198, which was consistent with the number launched between June and August 2013.
- There were five cucumber products were launched in Australia in the last 3 months.
- India and USA (both 10%) had the greatest number of launches over the last three months. Regionally, Asia Pacific and Europe had the majority of launches.
- Bottle (21%) and Tub (16%) were the most used pack formats in the last 3 months, consistent with Wave 3.
- Top category launches were skincare (29%), meals and meal centres (17%) and savoury spreads (12%).
- Top claims used for products were botanical/herbal (25%) and no additives/preservatives (21%).
- The most innovative launches were cucumber body wash and cucumber and dill flavoured lentil crackers (examples of these can be found in the following pages).

Source: Mintel (2013)

Cucumber SKUs
Country, Region & Categories

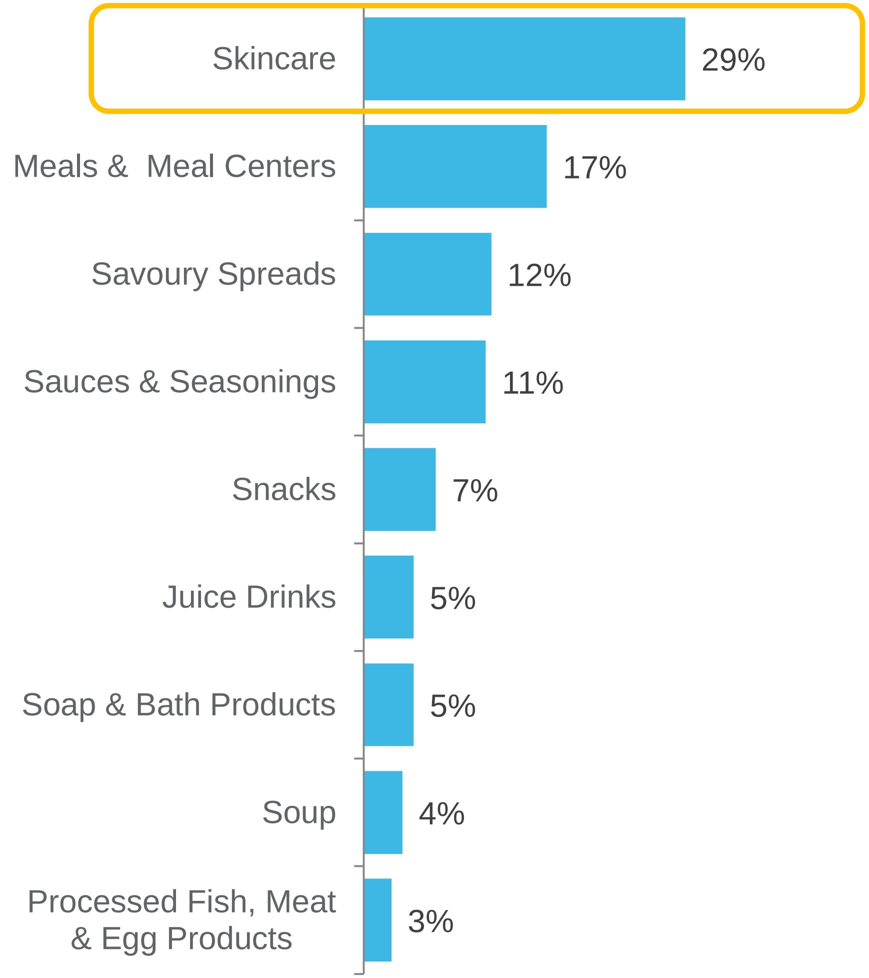
- USA and India were top countries for launches over the last three months.
- Nearly a third of all launches were in skincare related products.

Top Launch Countries



198 Global Launches

Top Launch Categories



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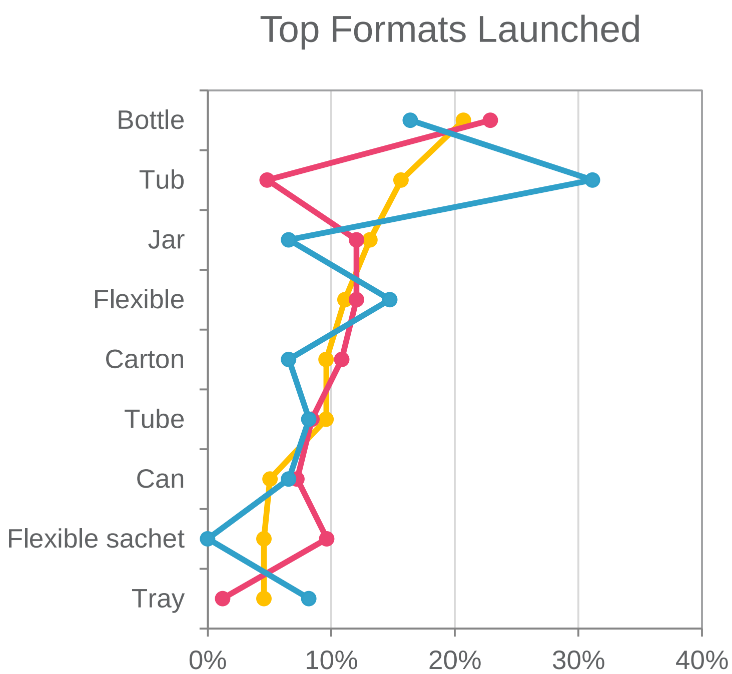
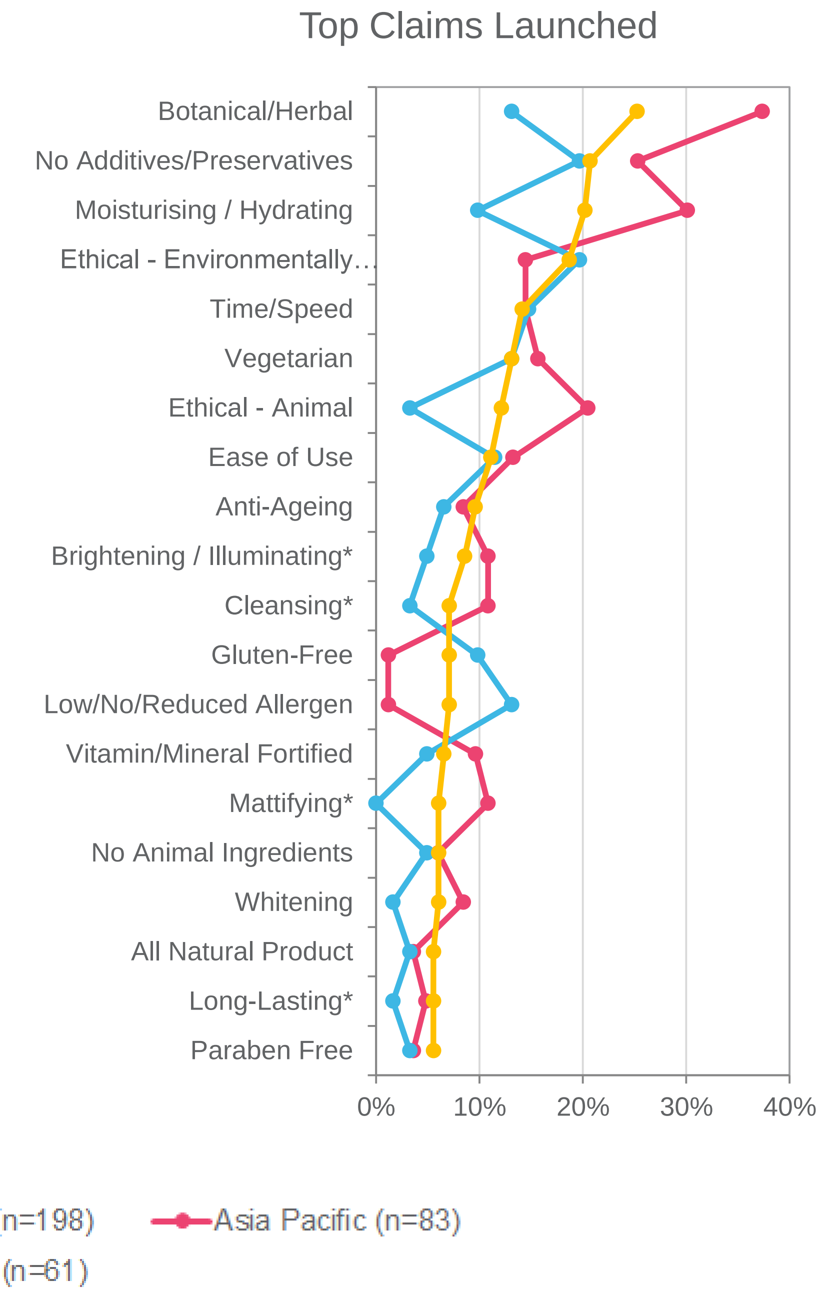
Number of Global Cucumber NPDs for the L3M N=198

Cucumber SKUs
Top Claims & Pack Formats Used

- Bottle and tub were common pack formats used. Tubs were primarily used in Europe.
- Top claims were botanical/herbal, no additives/preservatives and moisturising. These claims were more likely to be used in Asia Pacific.





Number of Global Cucumber NPDs for the L3M N=198
Only regions with n >30 are displayed

Innovative Cucumber Launches:

L3M (October - December 2013)

Nature's Factory Watermelon and Cucumber Flavored Red Tea Drink (Mexico)

Nature's Factory Polvo para Preparar Bebida de Té Rojo sabor Sandía Pepino (Watermelon and Cucumber Flavored Red Tea Drink Mix) is new to the range. This low calorie mix is very low sodium and features the antioxidants naturally present in tea.

Claims:
Low/No/Reduced Sodium, Antioxidant, Low/No/Reduced Calorie

Kaihai Cucumber, Prawn and Fish Dumplings (China)

Kaihai Huang Gua Xian Xia Yu Rou Xian Shui Jiao (Cucumber, Prawn and Fish Dumplings) have been repackaged. The dumplings are made according to a modern dumpling making technique. They are high in calcium and nutrients. Each one has a soft pastry and juicy, tender and tasty filling.

Claims:
N/A

Yes To Cucumbers Soothing Body Wash (USA)

Yes To Cucumbers Soothing Body Wash has been relaunched with a new product name (previously Calming Shower Gel), a new formula, and a newly designed 16.9-fl. oz. pack. The 97% natural and hypoallergenic product is suitable for sensitive skin, and formulated with calming green tea as well as a cucumber scent.

Claims:
For Sensitive Skin, Sulphate/Sulfate Free, Paraben Free, Botanical/Herbal, Hypoallergenic, Ethical - Charity, Mineral Oil/Petroleum Free

Masala Cucumber & Onion Chutney (Venezuela)

Masala Pepino & Cebolla Chutney (Cucumber & Onion Chutney) has been repackaged and is now available in a redesigned 215g jar. This 100% natural product contains no additives or artificial colors.
k.

Claims:
No Additives/Preservatives, All Natural Product

Source: Mintel (2013)

Innovative Cucumber Launches:
L3M (October - December 2013)

Woolworths Food Tuna & Cucumber Terrine (South Africa)

Woolworths Food Tuna & Cucumber Terrine has been repackaged. The ready-to-eat product is made with fresh cream and mayonnaise and is halal certified. It retails in a 125g pack made from a minimum of 30% recycled materials, and featuring the 'Fishing for the Future' logo to support sustainable seafood.

Claims:
Halal, Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product

Sea Gin Five Spice Braised Sea Cucumber Soup (Vietnam)

Sea Gin Sup Hai Sam Ham Ngu Vi (Five Spice Braised Sea Cucumber Soup) is now available. This soup has been processed via traditional methods on modern and specialized manufacturing lines. This soup is free from preservatives, artificial colourings and flavourings, and suitable for many people.

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

Jingyangguan Pickled Crispy Baby Cucumbers (China)

Waitrose Smoked Salmon & Cucumber Layered Terrine are layers of smoked salmon mousse and cucumber mousse, topped with Scottish smoked salmon pieces. The ready to eat product retails in a 120g recyclable pack.

Claims:
No Additives/Preservatives

M Cucumber Facial Wipes (UK)

M Cucumber Facial Wipes are suitable for all skin types including sensitive skin. The product features soothing cucumber extract and is said to be a quick and convenient way of cleansing and refreshing the skin. According to the manufacturer, they have been specially formulated to cleanse, refresh and gently remove make-up

Claims:
Alcohol Free, For Sensitive Skin, Cleansing*, Botanical/Herbal, Hypoallergenic, Time/Speed, Dermatologically Tested

Source: Mintel (2013)

Innovative Cucumber Launches:
L3M (October - December 2013)

Mediterranean Snacks Cucumber and Dill Flavoured Baked Lentil Chips (Spain)

Mediterranean Snacks Pepino y Eneldo (Cucumber and Dill Flavoured Baked Lentil Chips) are described as all natural chips great for dipping, topping and snacking. This lentil snack is a good source of fiber, has been made from high protein.

Claims:
All Natural Product, Low/No/Reduced Allergen, GMO-Free, Social Media, High/Added Fiber, Kosher, Low/No/Reduced Fat, Gluten-Free, Low/No/Reduced Transfat, Vegetarian, High Protein

President's Choice Greek Yogurt Cucumber, Dill and Lemon Dip (Canada)

President's Choice Greek Yogurt Cucumber, Dill and Lemon Dip has been reformulated with an improved great new taste. This kosher certified product is made with 100% cow's milk and retails in a 227g pack.

Claims:
Kosher

AH Excellent Japanese Yuzu Noodle Salad (Netherlands)

AH Excellent Japanese Yuzu Noodle Salade (Japanese Yuzu Noodle Salad) has been made with marinated noodles, cucumber, iceberg lettuce, radish and Japanese yuzu dressing. The vegetarian product retails in a 350g pack.

Claims:
Vegetarian, Premium

Agri Gold Spa Fairall Cucumber Face Pack (India)

Agri Gold Spa Fairall Cucumber Face Pack is designed to nurture and condition the skin in a traditionally harmless way. It is claimed to: promote natural beauty; bring glow to the complexion; delay ageing process; smooth wrinkled skin; and make skin glow and shine.

Claims:
Botanical/Herbal, Skin Disorders, Exfoliating, UV Protection, Whitening, No Animal Ingredients, Vegetarian, Ethical - Animal, Moisturising / Hydrating, Anti-Ageing, Reduces Fine Lines / Wrinkles*

Source: Mintel (2013)

Australian Cucumber Launches:
L3M (October - December 2013)

Beauty Care Co. Eye Make-Up Remover Wipes

Beauty Care Co. Eye Make-Up Remover Wipes is formulated with cucumber, chamomile and green tea to refresh the delicate eye area. The product is said to gently and effectively remove eye make-up and waterproof mascara in a conveniently-sized, travel-friendly pack. It retails in a pack containing 30 wipes.

Woolworths Select Double Dips Cashew, Basil & Parmesan & Tzatziki Dips

Woolworths Select Double Dips Chunky Cashew, Basil & Parmesan + Tzatziki Dips are now available. They are free from artificial preservatives, colours and preservatives and retail in a 200g tub.

Le Tan Wash Off Bronze

Le Tan Wash Off Bronze is said to provide an instant natural looking tan with no commitment, giving bronzed, glowing skin. It is designed to stay on the skin until is washed off with soap and a scrub. The product has not been tested on animals, and retails in a 100g pack.

Sunraysia Organic Mixed Vegetables & Apple Juice

Sunraysia Organic Mixed Vegetables & Apple Juice presents its new organic range of 100% juice drinks with nothing added and nothing taken away.

Australian Pure Beauty Sensitive Cleansing Wipes

Australian Pure Beauty Sensitive Cleansing Wipes are said to cleanse, tone, soften and remove make-up, oil and impurities in one easy-step. They are enriched with cucumber and vitamin E, and free from synthetic fragrance,.

Source: Mintel (2013)

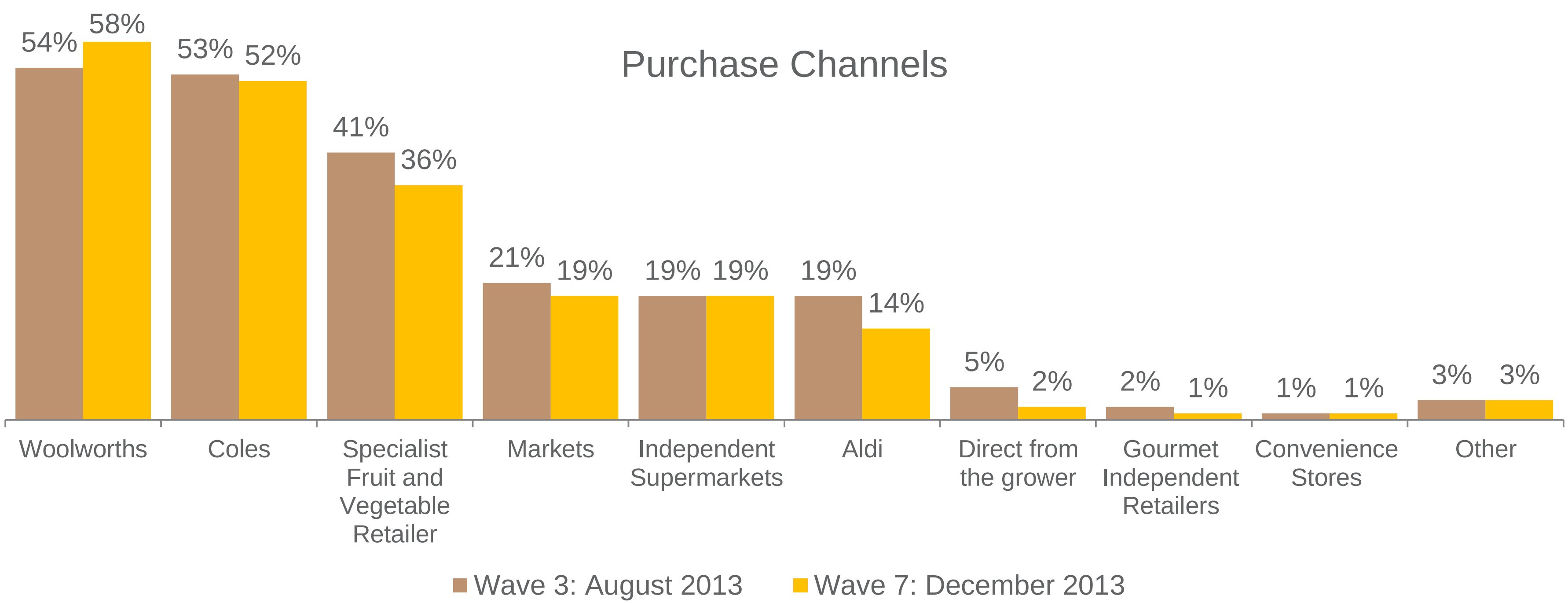
Zucchini.

Purchase and Consumption Behaviour
Zucchini

Average Purchase **3.4** times per month (cf. 3.8 times per month Wave 3)

Average Consumption **6.8** times per month (cf. 7.3 times per month Wave 3)

- Although not significant, there was a trend to decreased purchase and consumption frequency compared with Wave 3.
- Purchase channels were consistent with Wave 3.



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

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Average Spend & Price Sensitivity

Zucchini

⇛ The average consumer typically purchases **600g** of Zucchini, which had significantly decreased from 700g in Wave 3 (August 2013).

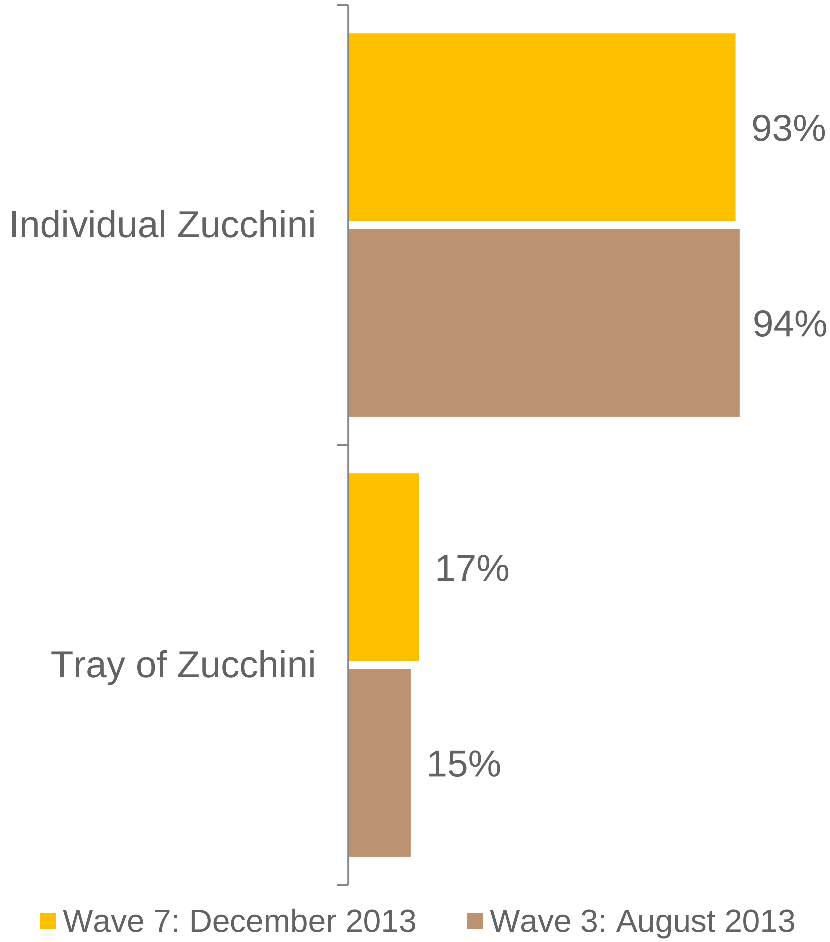
⇛ The average recalled last spend on Zucchini was **$2.70**, compared with $2.60 for Wave 3**.**

⇛ Perceived value for money had significantly decreased since Wave 3 (6.4*/10), although consumers did indicate a positive value for money **(6.0/10).**

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?
* Indicates significantly higher score between waves at 95% CI

Pack Formats Purchased

Zucchini



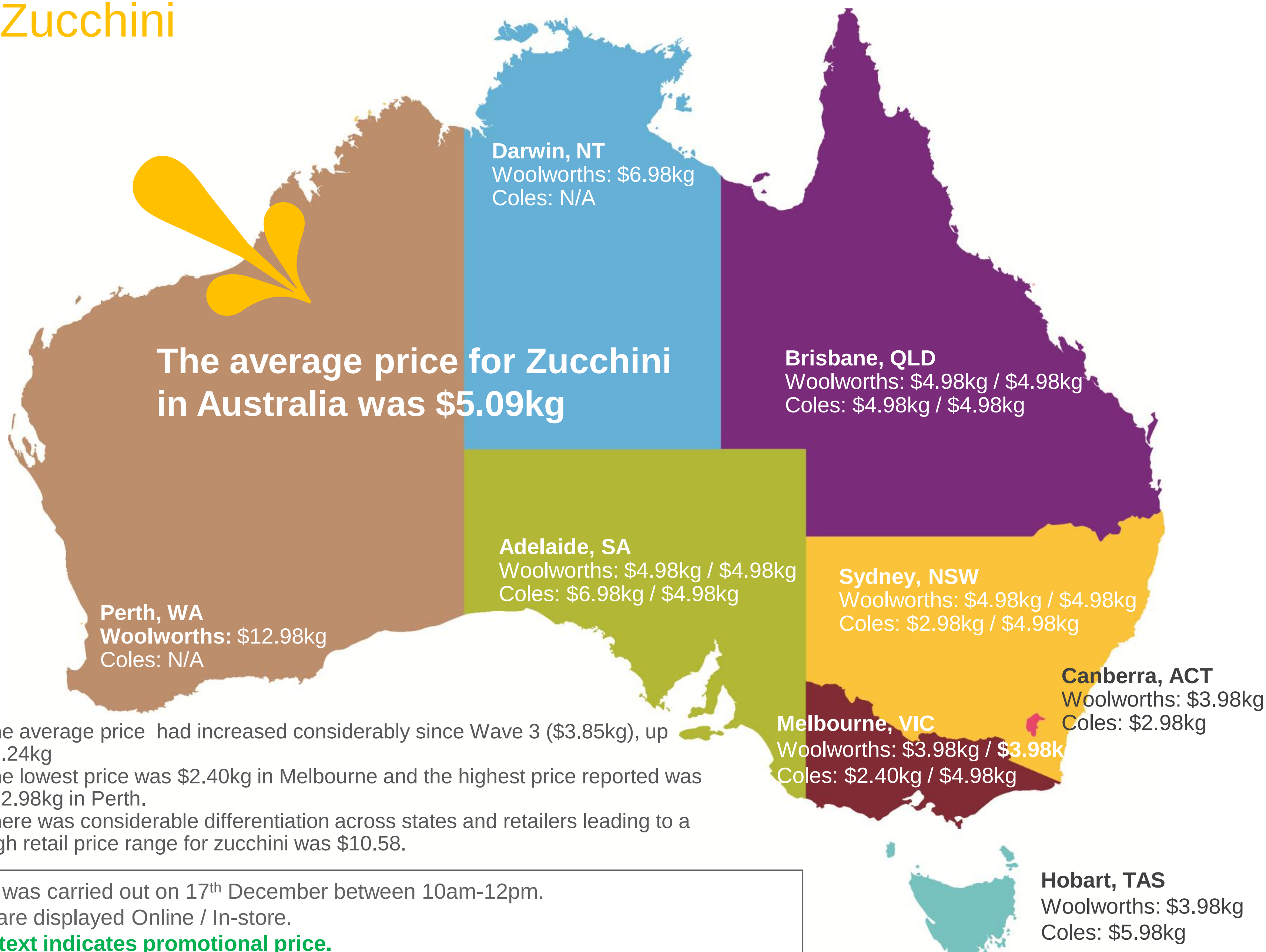
Amount Purchased if Selected (mean)

- Pack formats were consistent with purchases in Wave 3. Individual zucchinis remained the dominant format.
- Number of formats purchased was on par with Wave, on average 3 individual zucchinis were purchased.

Q3a. How much <commodity> does this typically equate to?

Online and In-store Commodity Prices

Zucchini

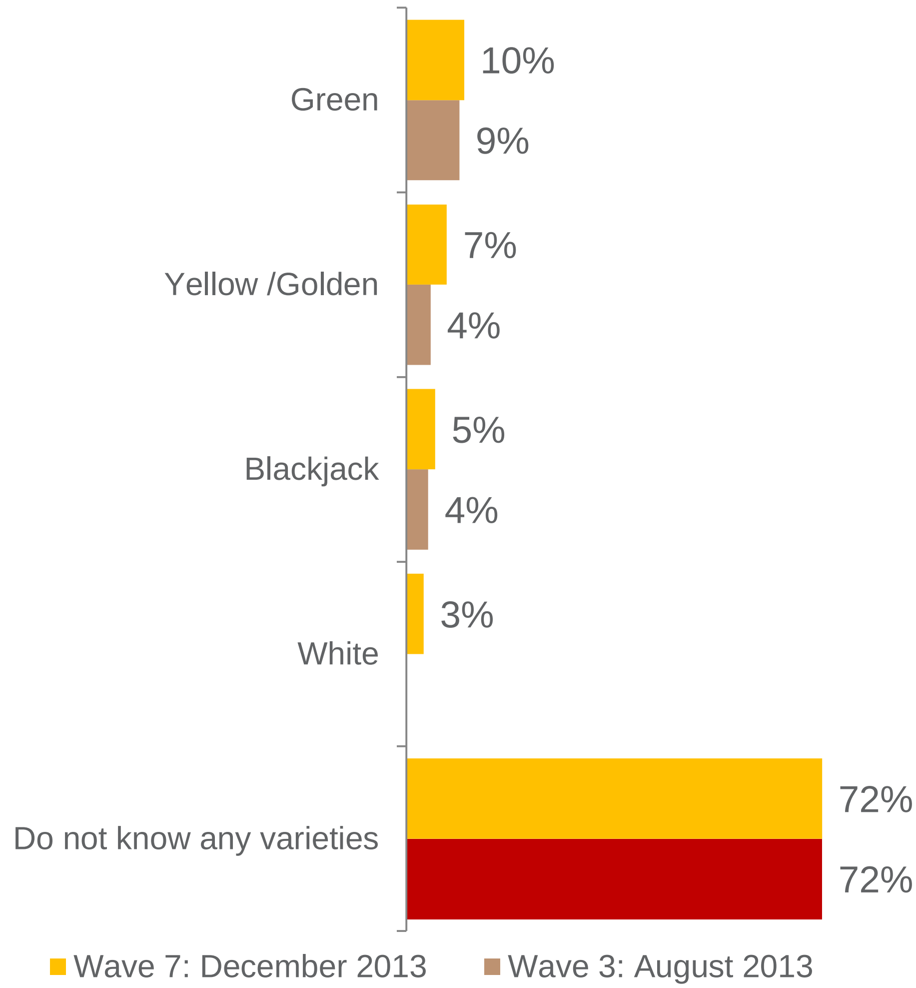


- The average price had increased considerably since Wave 3 ($3.85kg), up $1.24kg
- The lowest price was $2.40kg in Melbourne and the highest price reported was $12.98kg in Perth.
- There was considerable differentiation across states and retailers leading to a high retail price range for zucchini was $10.58.

Pricing was carried out on 17th December between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates promotional price.

Spontaneous Awareness & Purchase
Zucchini

- Awareness of zucchinis was low, with over 70% of respondents no recalling a type. The low level of awareness was consistent with Wave 3.
- The most recalled zucchini types were green and yellow, which suggests that a large proportion of awareness was driven by colour rather than type.
- A small number of respondents stated the ‘blackjack’ zucchini type, which was on trend with Wave 3.

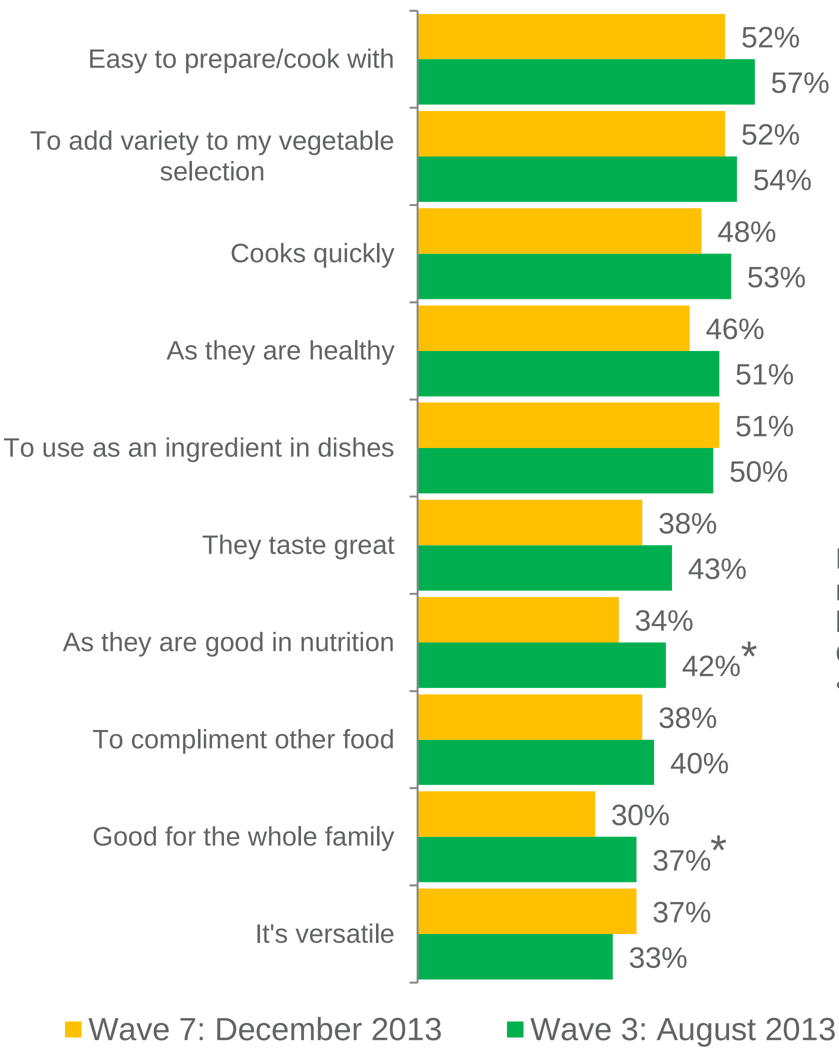


Sample Wave 3 N=502, Wave 7, N=329
Q6a. What varieties of <commodity> are you aware of? (unprompted)

Triggers & Barriers to Purchase

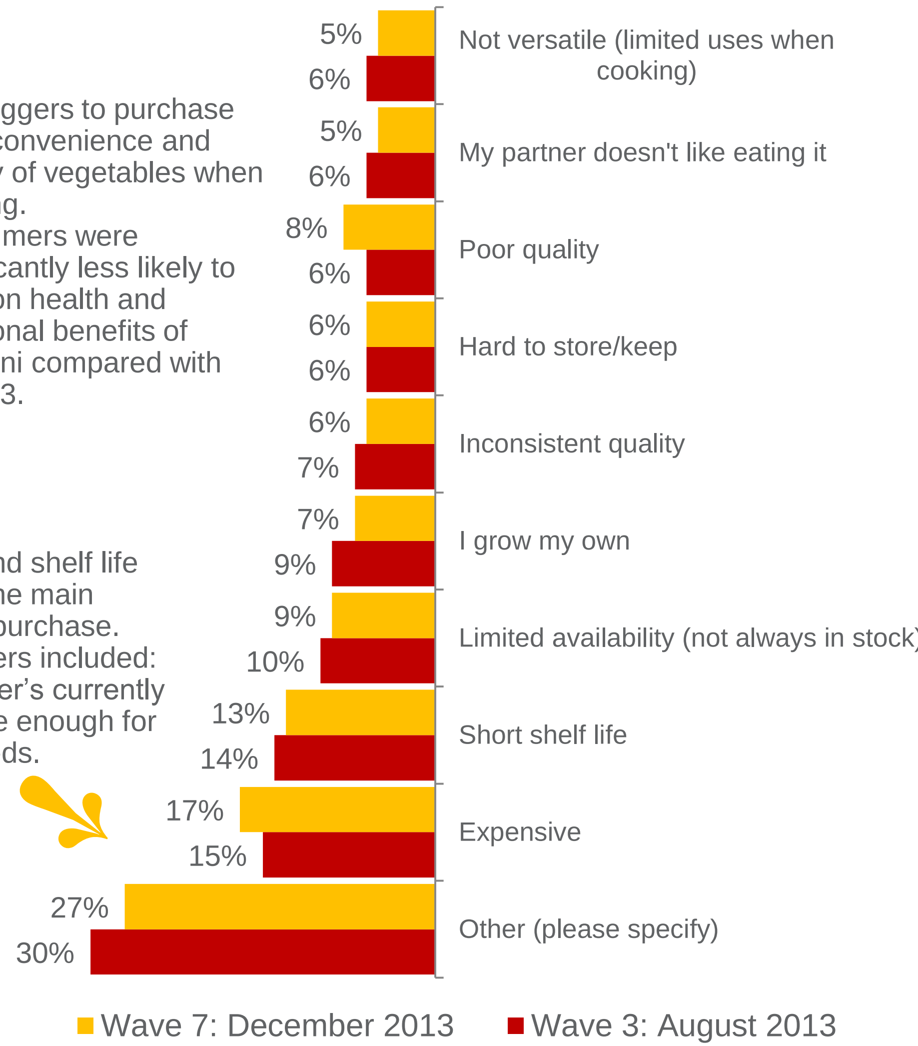
Zucchini

Triggers



- Key triggers to purchase were convenience and variety of vegetables when cooking.
- Consumers were significantly less likely to mention health and nutritional benefits of zucchini compared with Wave 3.

Barriers



Expense and shelf life remained the main barriers to purchase. Other barriers included:

- Consumer's currently purchase enough for their needs.

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

* Indicates significantly higher score between waves at 95% CI

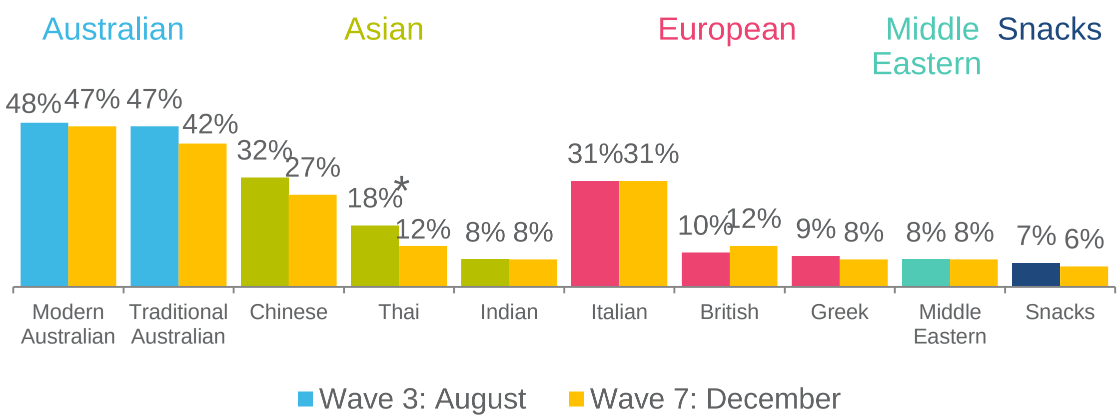
Q7. Which of the following reasons best describes why you purchase <commodity>?

Q8. Which reason best describes why you don't buy <commodity> more often?

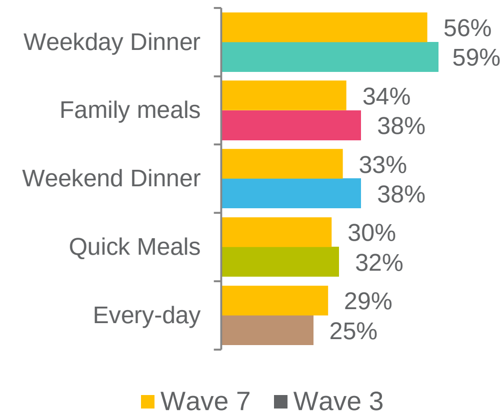
Cooking Preferences & Occasions: Zucchini

- Zucchini was cooked significantly less frequently with potatoes, broccoli and cauliflowers compared with Wave 3. This may indicate a move for zucchini to be incorporated into less traditional cuisine bases.
- Thai cuisine was also significantly less likely to be cooked, however cooking of other cuisines were on trend with Wave 3.
- Consumers were more likely to stir-fry zucchini compared with Wave 3.
- Weekday dinners remained the top consumption occasion.

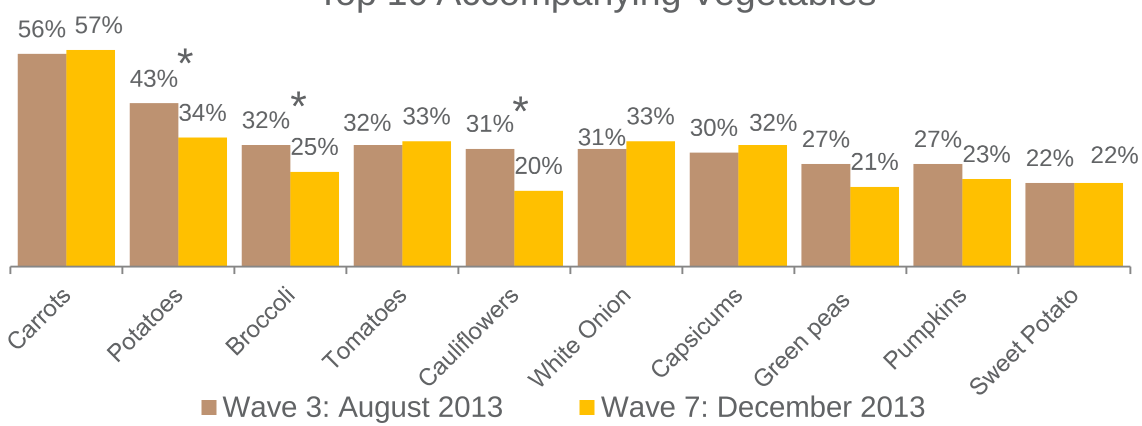
Typical Cuisine Cooked



Top 5 Consumption Occasions



Top 10 Accompanying Vegetables



Top 10 Cooking Styles		
	Wave 3	Wave 7
Stir frying	46%	51%
Steaming	42%	33%
Soup	28%	24%
Baking	23%	24%
Boiling	21%	18%
Sautéing	21%	22%
Roasting	19%	23%
Microwave	18%	22%
Grilling	18%	18%
Stewing	17%	15%

Sample Wave 3 N=502, Wave 7, N=329
* Indicates significantly higher score between waves at 95% CI
Q9. How do you typically cook <commodity>?
Q10. What cuisines do you cook/consume that use <commodity>?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
Q11. Which of the following occasions do you typically consume/use <commodity>?

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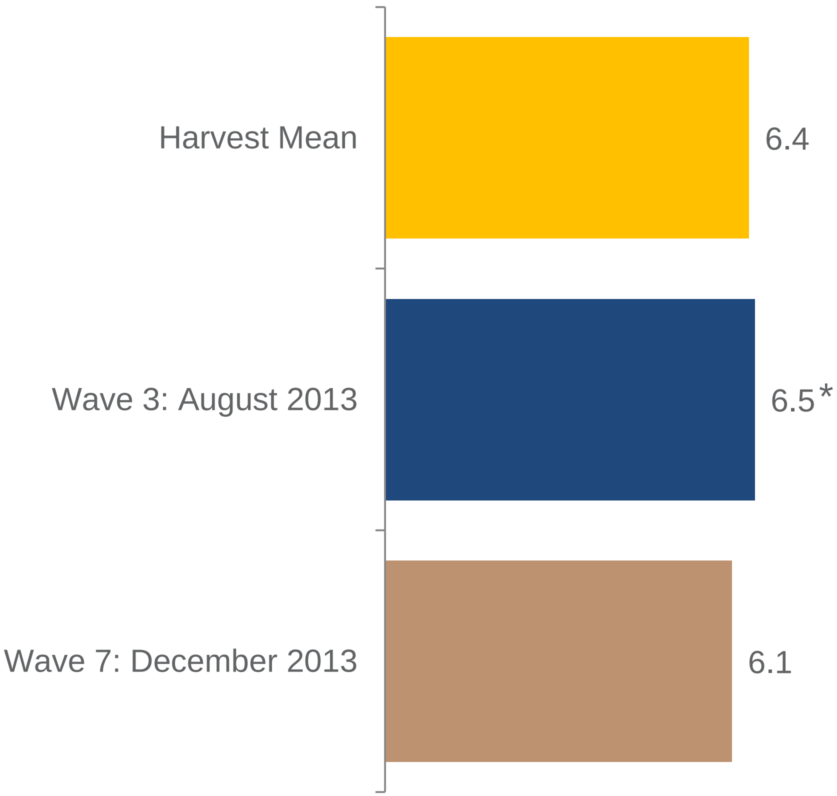
Importance of Provenance

- The importance of provenance had significantly decreased since Wave 3, and is on average, less important than other Harvest commodities.



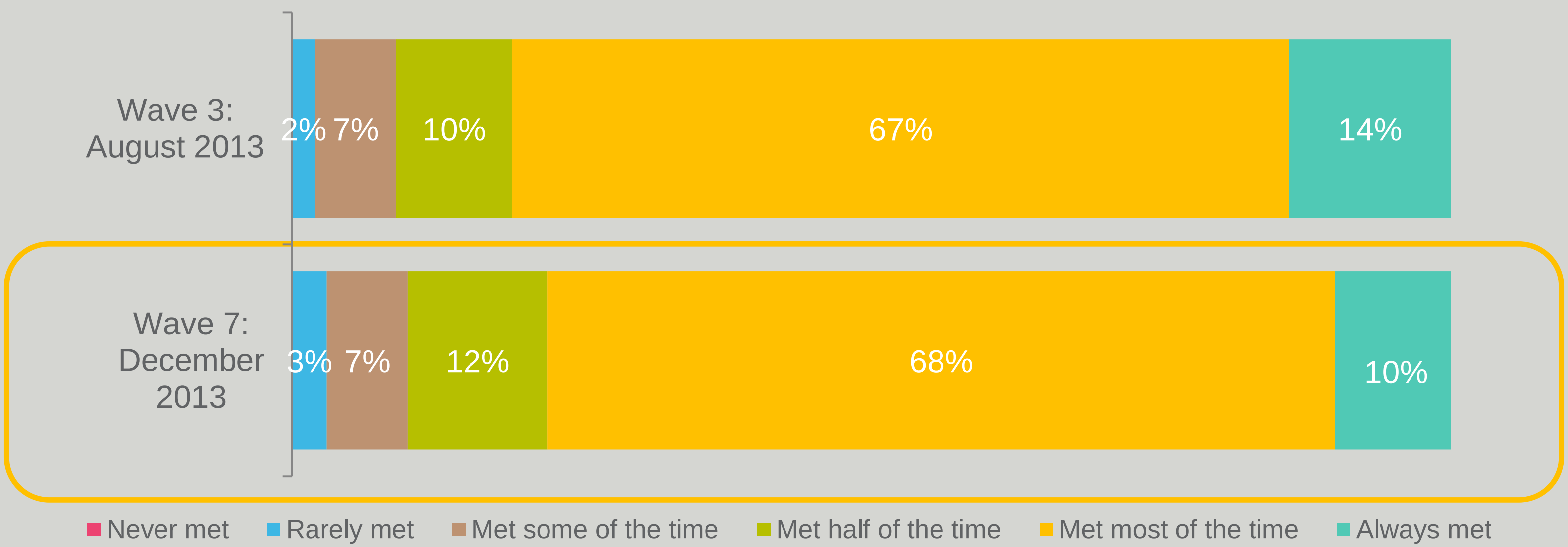
Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 3 N=502, Wave 7, N=329
* Indicates significantly higher score between waves

Freshness and Longevity: Zucchini

Expected to stay fresh for **7.9** days (cf. 8.2 days for Wave 3)

- Consumers indicated that they expected zucchini to stay fresh for over one week after purchase, which was on trend with Wave 3.
- Expectations of freshness were consistent with Wave 3, with 78% of consumers indicated freshness was met at least most of the time.

Expectations Met



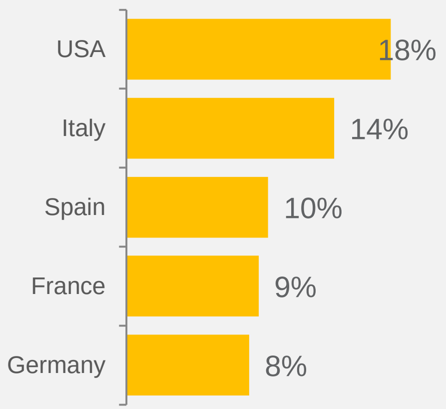
Sample Wave 3 N=502, Wave 7, N=329
Q12. How long do you expect <commodity> to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy <commodity> ?

Trends: Zucchini

Zucchini Global NPDs
October – December 2013

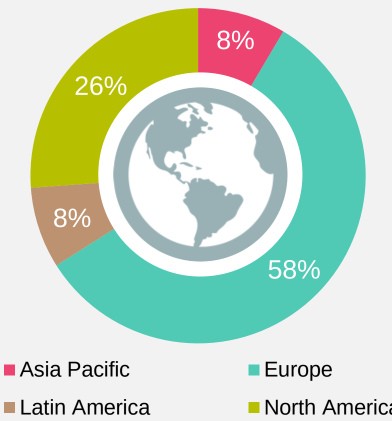
There were 153 global launches of products that contain zucchini. The majority of these launches occurred in Europe. Products were launched in meals, fruit and vegetables and soup categories. Flexible and tray formats were the most common packaging used.

Country

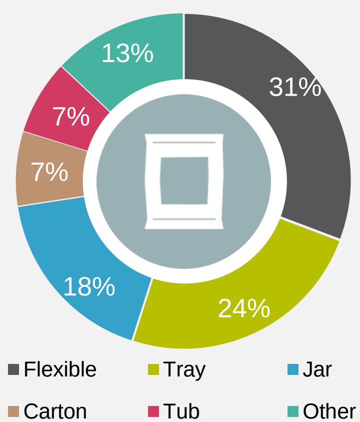


153 Global Launches

Region



Top Pack Formats



Categories

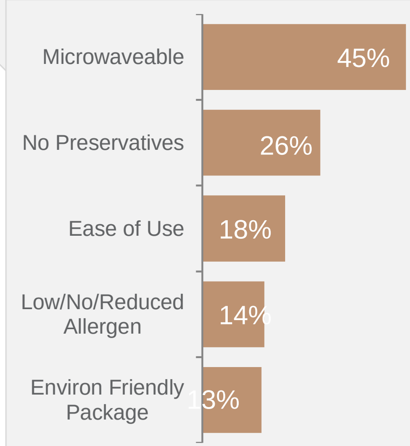
Meals 31%

Fruit & Vegetables 23%

Soup 12%

Sauces 11%

Top Claims



Zucchini Product Launches:
Last 3 Months (October – December 2013)
Summary

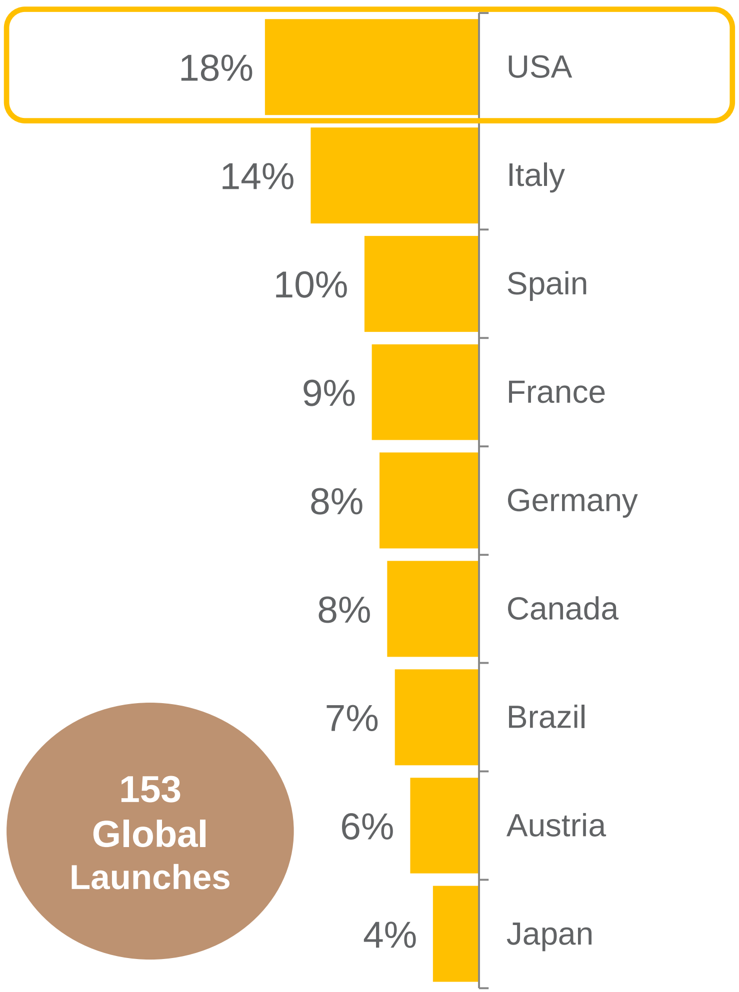
- There were 153 global zucchini launches in the last 3 months, which is higher than the number of launches between June to August.
- Two products containing zucchini were launched in Australia, vegie burger patties and a lasagne.
- Launches primarily occurred in Europe (58%) and North America (26%), which is consistent with Wave 3 launches.
- Top pack formats used were flexible packaging (31%) and trays (24%).
- Meals (31%), fruit and vegetables (23%) and soups (12%) were the main launch categories.
- Top claims made were around convenience; microwavable (45%) and ease of use (18%) and containing no preservatives (26%).
- The most innovative product launches were zucchini curry spread and zucchini, gingerbread and carrot flavoured snacks (examples of these can be found in the following pages).

Source: Mintel (2013)

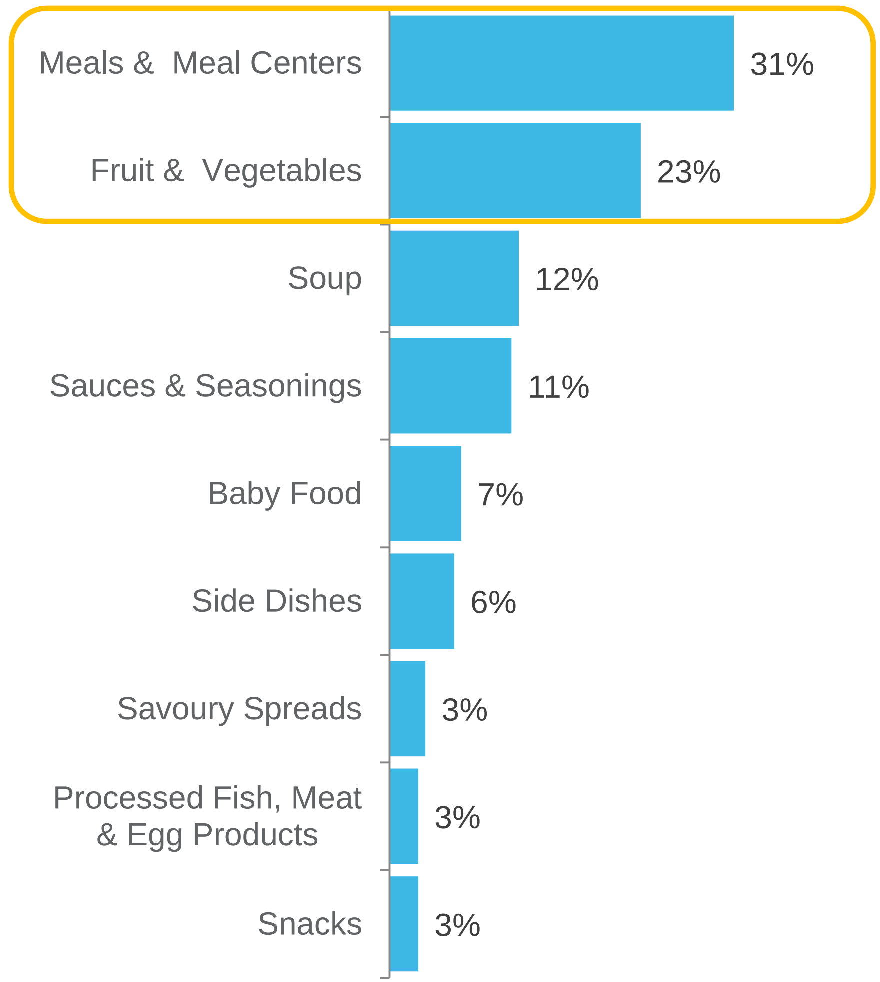
Zucchini SKUs
Country, Region & Categories

- USA, Italy and Spain were the top launch countries.
- Nearly a third of launches were meals and meal centre products. There were also a number of fruit & vegetable and soups launched in the last three months.

Top Launch Countries



Top Launch Categories



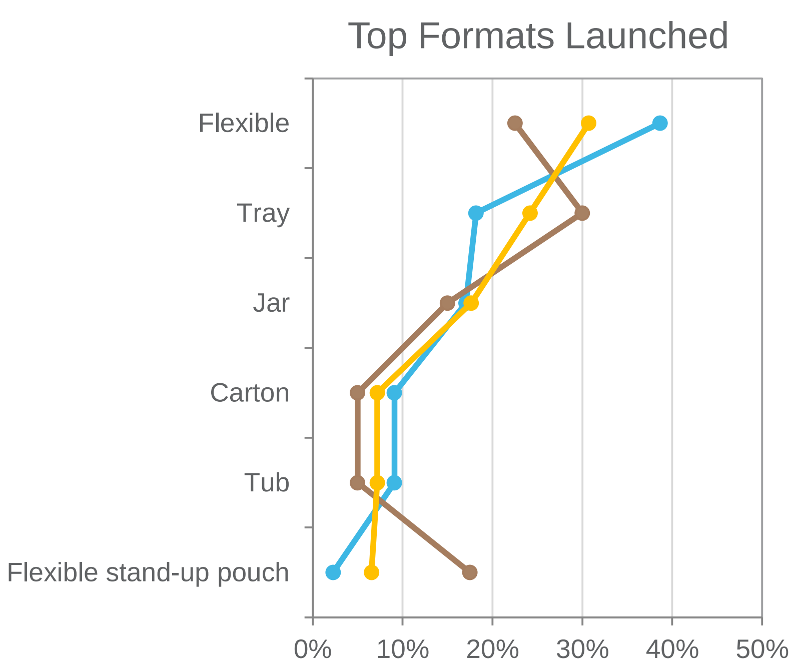
colmar brunton.

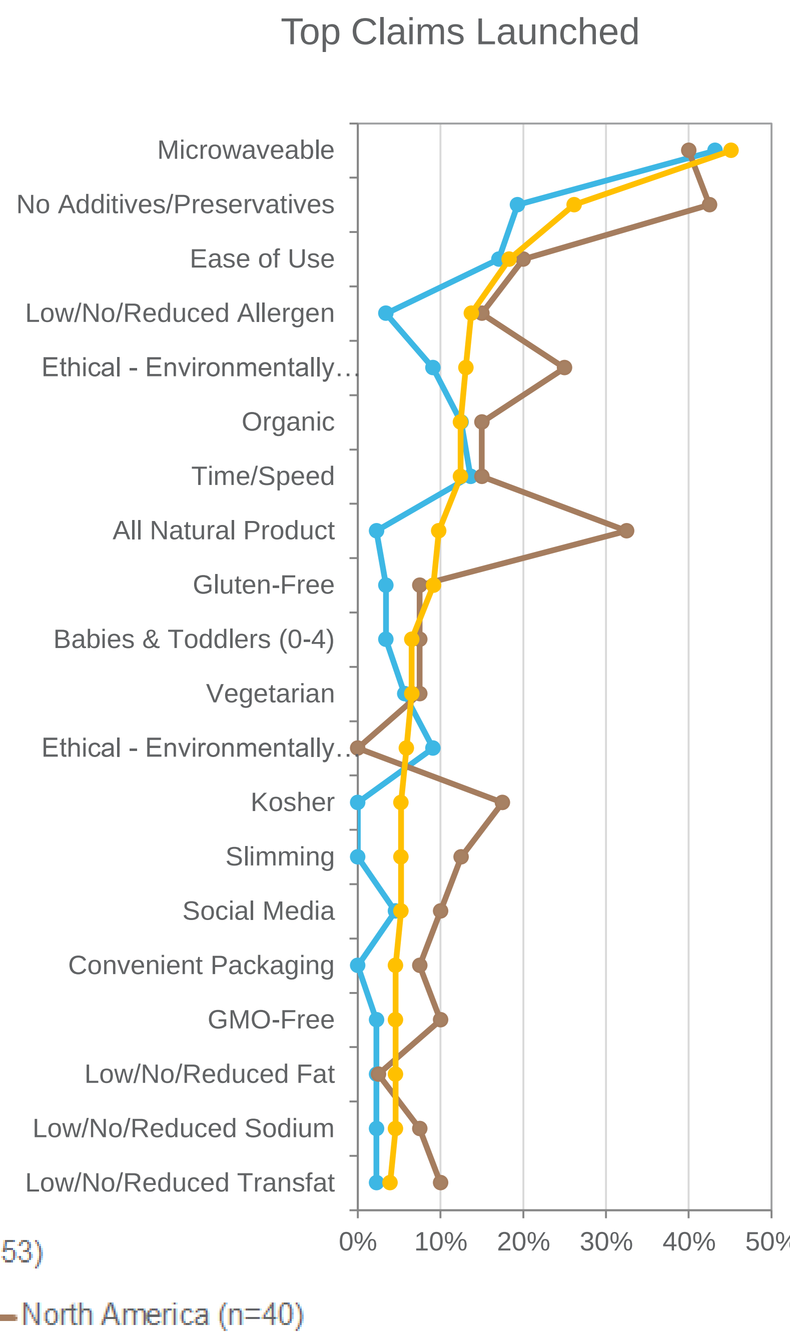
Number of Global Zucchini NPD for the L3M N=153

Zucchini Launches

Top Claims & Pack Formats Used

- Flexible packaging was the most common format used for products launched. Tray packaging was the top format used in North America.
- Nearly half of products launched over the past three months contained the claim 'Microwavable'.





Number of Global zucchini NPD for the L3M N=114
Only regions with n >30 are displayed

Innovative Zucchini Launches:
L3M (October - December 2013)

José Andrés Tomatoes, Red & Green Peppers & Zucchini (USA)

José Andrés Tomatoes, Red & Green Peppers & Zucchini have been picked fresh, hand cut and cooked in small pots. It is processed using a traditional method, which preserves the textures and tastes of each ingredient while blending their goodness to create a unique flavour of its own.

Claims:
No Additives/Preservatives

Bitsy's Brainfood Smart Snacks Zucchini, Gingerbread and Carrot Flavoured Snacks (USA)

Bitsy's Brainfood Smart Snacks Zucchini and Gingerbread Carrot Flavored Snacks are oven baked alphabet shaped snacks with real fruits and veggies, made with organic whole wheat flour and carrots that are an excellent source of vitamin A, vitamin B12, vitamin B6, vitamin D3, folic acid, omega-3 EPA and DHA and a good source of calcium

Claims:
Low/No/Reduced Allergen, GMO-Free, Kosher, Ethical - Environmentally Friendly Package, Organic, Children (5-12), Wholegrain

U Bio Provençal Style Cooked Zucchini (France)

Bio Courgettes Cuisinées à la Provençale (Provencal Style Cooked Zucchini) is made in Provence, region of France and can be eaten hot or cold, or paired with meat or fish. This certified organic product retails in a 520g recyclable jar.

Claims:
Ethical - Environmentally Friendly Package, Organic, High/Added Fiber, Ethical - Environmentally Friendly Product, Convenient Packaging

Chef Per Me Risotto with Saffron, Shrimps and Zucchini (Italy)

Chef Per Me Risotto allo Zafferano con Gamberi e Zucchini (Risotto with Saffron, Shrimps and Zucchini) contains olive oil, and is said to be delicious. This microwaveable ready-to-prepare product is free from preservatives, and is ready in two minutes.

Claims:
Ease of Use, No Additives/Preservatives, Microwaveable

Source: Mintel (2013)

Innovative Zucchini Launches:
L3M (October - December 2013)

Gerber Graduates Grabbers Banana, Pear & Zucchini Squeezables (USA)

Gerber Graduates Grabbers Banana, Pear & Zucchini Squeezable Fruit & Veggies are made with natural fruit and vegetables. The product contains two servings of fruit and veggies per pouch and is an excellent source of vitamins C and E.

Claims:
No Additives/Preservatives, Social Media, On-the-Go, Low/No/Reduced Sugar, Low/No/Reduced Sodium, Babies & Toddlers (0-4)

M. de Turenne Velvety Zucchini Soup (France)

M. de Turenne Velouté de Courgettes (Velvety Zucchini Soup) is now available. This product retails in a 500ml bottle.

Claims:
N/A

Del Monte Fresh Cut Specialties Zucchini (USA)

Del Monte Fresh Cut Specialties Zucchini contains Italian style tomato sauce and is guaranteed to be picked and packed fresh. The kosher product is suitable for microwave cooking and retails in a 14.5-oz. recyclable can.

Claims:
Ethical - Environmentally Friendly Package, No Additives/Preservatives, Kosher, Microwaveable

Tartex Cremisso Zucchini Curry Spread (Germany)

Tartex Cremisso Zucchini Curry Pflanzlicher Brotaufstrich (Zucchini Curry Spread) has been repackaged in a redesigned 180g pack. This vegetarian and vegan product is organic and made from sunflower seeds.

Claims:
Organic, Vegan, Vegetarian, No Animal Ingredients

Source: Mintel (2013)

Innovative Zucchini Launches:
L3M (October - December 2013)

Plum Organics World Baby Italy Zucchini and Spinach with Pasta (USA)

Plum Organics World Baby Italy Zucchini and Spinach with Pasta Marinara Organic Baby Food contains 260% DV vitamin A, 12% DV protein and no genetically modified ingredients. The product is suitable for babies from six months of age and retails in a BPA-free, recyclable 21-oz. pack containing six 3.5-oz. pouches.

Claims:
Ethical - Environmentally Friendly Package, Organic, Babies & Toddlers (0-4), GMO-Free

St Marche Receita Grilled Zucchini Appetizer (Brazil)

St Marche Receita Abobrinha Grelhada Antepastos (Grilled Zucchini Appetizer) is light and delicate, made according to a traditional Italian recipe. The gluten-free product can be served with Italian bread, ciabatta or toast, and retails in a 150g pack.

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

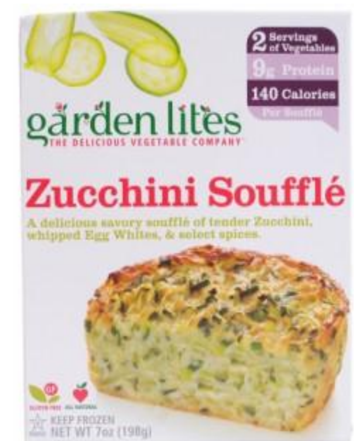
Monoprix White Fish with Basmati Rice, Zucchini & Carrot (France)

Monoprix Poisson Blanc et Riz Basmati Courgette Carotte (Alaskan Hake with Basmati Rice, Zucchini & Carrot) has been repackaged. The microwaveable product is now available in a newly designed 300g pack.

Claims:
Microwaveable

Garden Lites Zucchini Soufflé (USA)

Garden Lites Zucchini Soufflé has been repackaged featuring a new design. It is described as a delicious savory soufflé of tender zucchini whipped egg whites and select spices. This light meal is loaded with fiber and protein to stay full longer, helping the consumer to live a healthier lifestyle, according to the company.



Claims:
All Natural Product, Low/No/Reduced Allergen, High/Added Fiber, Kosher, Slimming, Microwaveable, Ethical - Environmentally Friendly Package, Gluten-Free, High Protein, High Satiety

Source: Mintel (2013)

Australian Cabbage Launches:
L3M (October - December 2013)

Australian Eatwell Garden Fresh Vegie Burgers with Chickpea & Sunflower Seeds

Australian Eatwell Garden Fresh Vegie Burgers with Chickpea & Sunflower Seeds have been repackaged with an new design. This product is suitable for vegans and vegetarians, is an excellent source of fibre, and free from GMO, dairy, cholesterol and lactose. The microwavable burgers retail in a 500g easy peel pack containing four units.

Claims:
Low/No/Reduced Lactose, Low/No/Reduced Allergen, Low/No/Reduced Cholesterol, GMO-Free, High/Added Fiber, Vegan, Microwaveable, Convenient Packaging, No Animal Ingredients, Vegetarian

Latina Fresh Low Fat Lasagne with Angus Lean Beef & Vegetables

Latina Fresh Low Fat Lasagne with Angus Lean Beef & Vegetables are said to be naturally good and made with the best quality ingredients to provide the freshest and tastiest ready meal. They are 97% fat free and a source of fibre.

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

Source: Mintel (2013)

In the Media.

General Vegetable News
(October - December 2013)

- Green vegetables have the potential to be the source of renewable energy with the prospect of low cost storage, such as batteries.

(www.smh.com.au)

- Trends research by JWTInternational predict that natural vegetable flavoured yoghurts. There is interest in cucumber and chili flavoured health snacks as well.

(www.hydroponics.com.au)

- Vegetarianism is growing in Australia. Overall, this is fulfilling our interest in fresh and local ingredients.

(www.ausfoodnews.com.au)

Commodity News
(June – August 2013)

- There are over 400 varieties of cabbage, colour ranging from white-green to red-purple. (www.ocregister.com)
- To choose a cabbage, select a head that is firm and dense. The leaves should be shiny and colourful. Storing the cabbage in the fridge will retain its Vitamin C.

(www.yumasun.com)

- In ancient times, the Greeks associated celery with music, and the Romans believed it to be a herb, rather than a vegetable. The Germans have a long history of using celery in soup.

(www.motherearthnews.com)

- Odd Spot Uses for Cucumber:

1. The phytochemicals in cucumber kill bacteria that cause bad breath.
2. The anti-inflammatory properties can help reduce skin irritations and sunburn, like aloe.
3. Cucumbers are 95% water and are good for hydration and eliminating toxins from the body.

(www.naturalnews.com)

- Sainburys, a UK supermarket, is stocking round zucchinis. This variety is about the size of a cricket ball and has similar sensory properties to a cucumber.

(www.dailymail.co.uk)

Thanks.