Horticulture Australia and AUSVEG.

VG12078 Project Harvest.

Monthly Tracker Report Wave 9: February 2014

Prepared by: Denise Hamblin, Stuart Todd, Matthew Schwarze & Fiona McKernan

colmar brunton.

Contents

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.

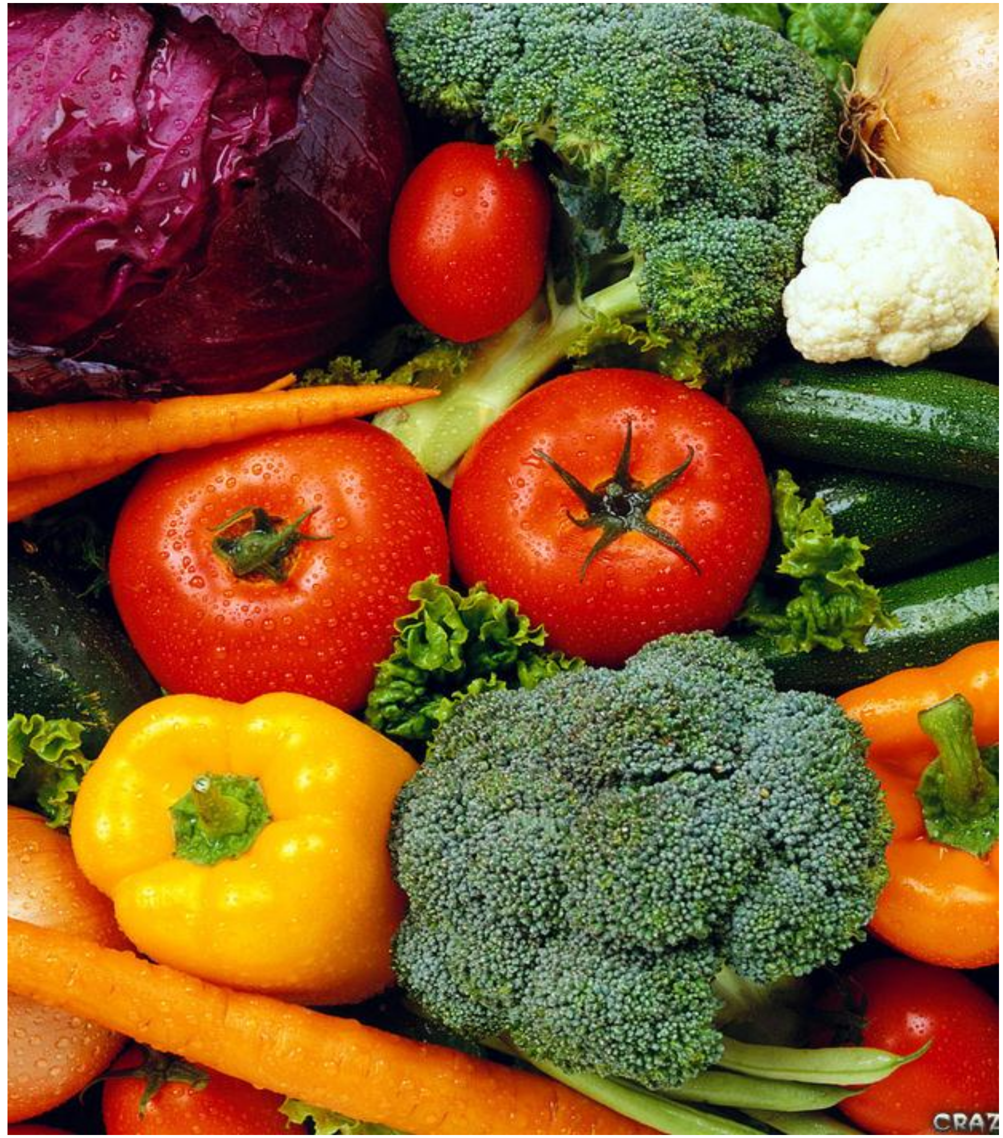
Colmar Brunton has been commissioned to conduct a monthly on-line tracking project following specified vegetables across a three year period; monthly trend analysis; and additional ad-hoc projects to assist in this understanding of consumers.

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 9, February 2014) focuses on:

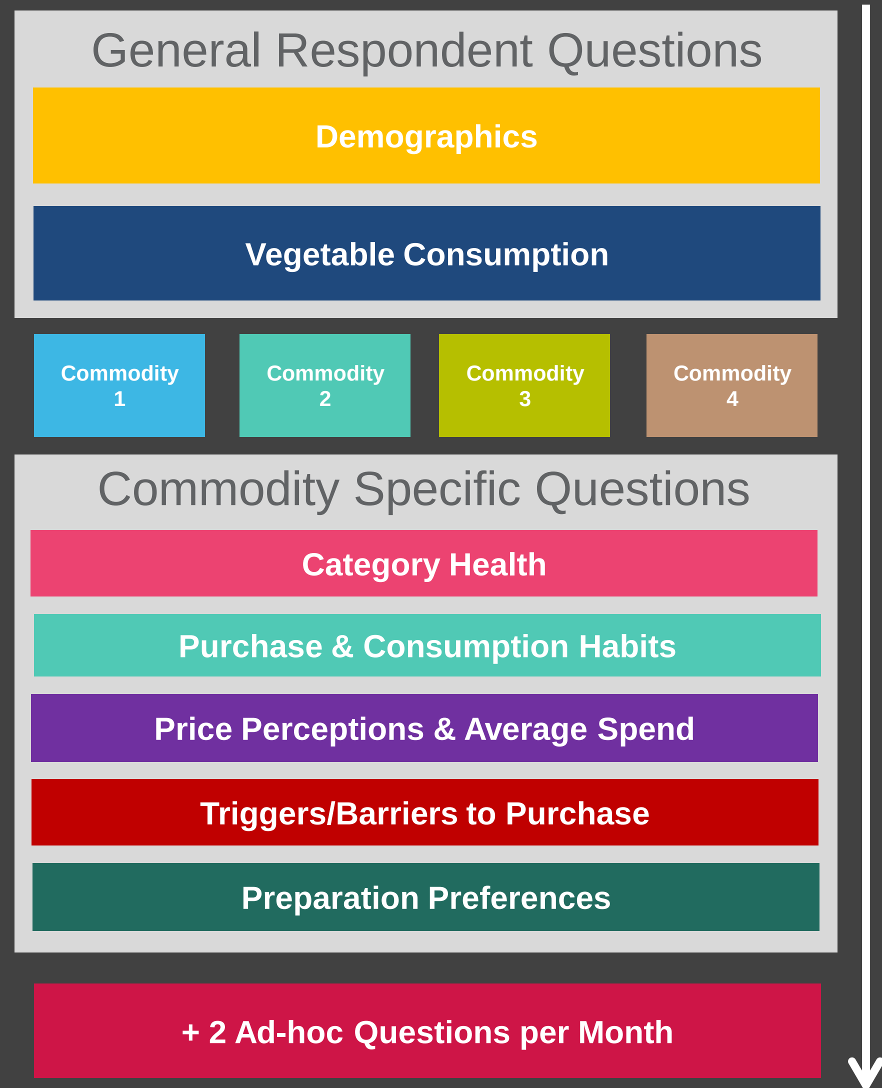
- Beans (French & Runner)
- Carrots
- Cauliflowers
- Pumpkins

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, i.e. since June 2013.



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, 586 respondents completed the questionnaire. Respondents represented all 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 (Bean, Carrot, Cauliflower or Pumpkin) within the last month
- Were the main or joint grocery buyer

	Total N=586	Bean N=307	Carrot N=345	Cauliflower N=316	Pumpkin N=305
Gender					
Male	36%	33%	34%	38%	36%
Female	64%	67%	66%	62%	64%
Age					
18-24 y.o.	7%	7%	9%	7%	6%
25-34 y.o.	24%	25%	27%	24%	22%
35-44 y.o.	19%	21%	20%	18%	17%
45-54 y.o.	17%	14%	18%	18%	19%
55-64 y.o.	19%	18%	15%	18%	20%
65+ y.o.	15%	14%	12%	15%	16%
Household					
Single Income no Kids	20%	17%	23%	16%	19%
Double Income no Kids	18%	21%	17%	18%	17%
Young Families	20%	22%	23%	20%	19%
Established Families	21%	21%	19%	22%	21%
Empty Nesters	21%	19%	18%	24%	25%
Location					
New South Wales	21%	22%	17%	18%	20%
Victoria	16%	20%	20%	17%	19%
South Australia	19%	16%	16%	20%	18%
Queensland	17%	19%	19%	17%	16%
Western Australia	17%	16%	15%	15%	15%
Tasmania	6%	4%	8%	8%	6%
Australian Capital Territory	4%	3%	4%	4%	5%

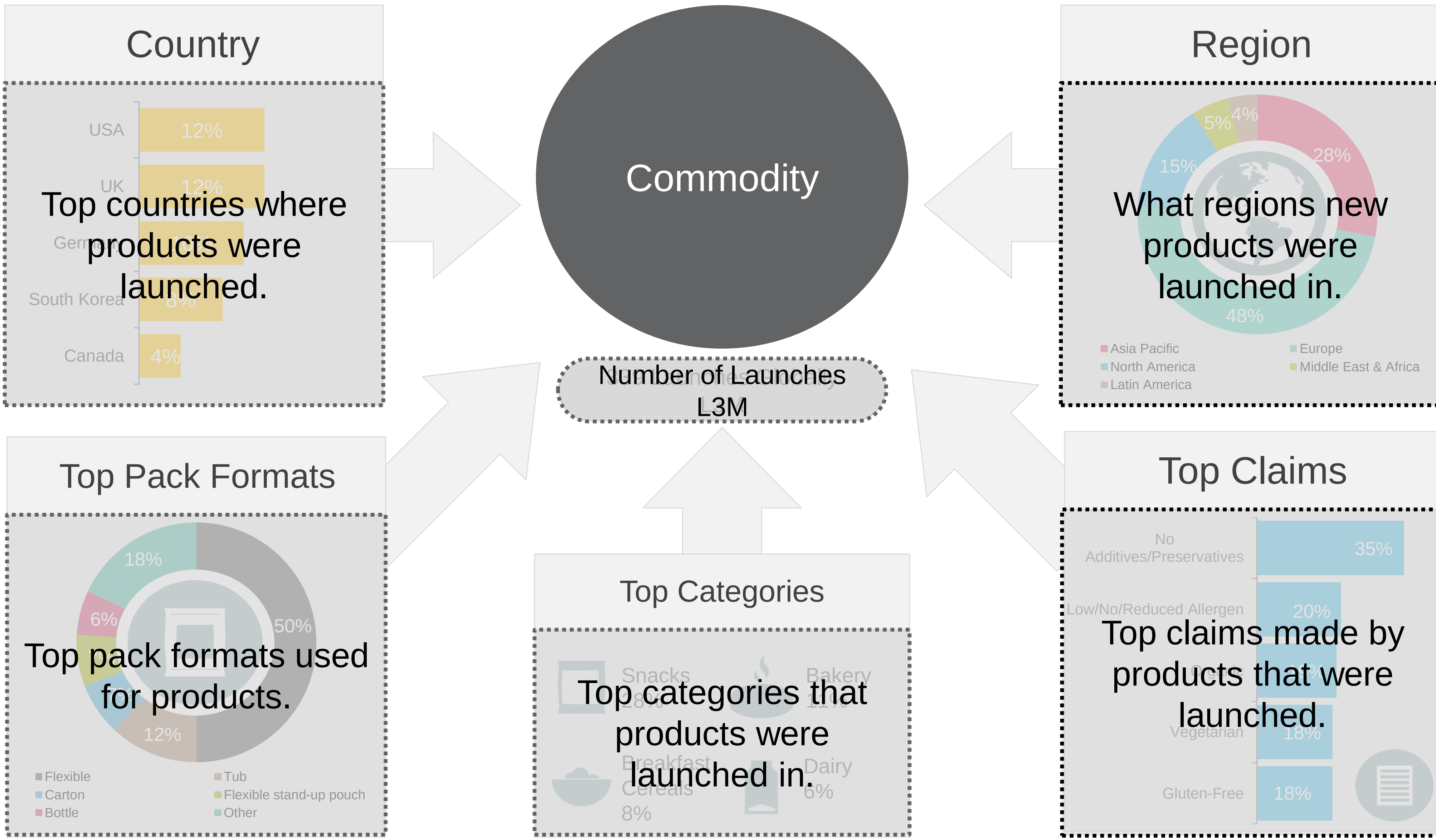
Trends Research: Our Approach

- 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 9:
Executive Summary

Beans Grower Action Plan

Length of freshness and expectations less likely to be met.

1.

Insight:

Expense is the main barrier to future purchase.

Recommendation:

Determine if there are other varieties of green bean that can be supplied to consumers that are price competitive and stay fresh for a suitable amount of time.

2.

Insight:

Trend towards decreased perceived value for money.

Recommendation:

Investigate alternative packaging solutions for individual beans, such as breathable, flexible formats that could extend shelf life of commodity once purchased.

3.

Insight:

Recall of bean types remained low.

Recommendation:

Currently mainstream retailers stock one type of fresh green bean. There is enough interest from consumers to provide multiple varieties, of which need to be clearly communicated at point of sale to increase awareness and satisfy consumer needs.

Carrot Grower Action Plan

68% The key trigger to future purchase was health.

1.

Insight:

Carrots were expected to remain fresh for 12 days, one of the longest of all commodities.

Recommendation:

Leverage carrot's freshness expectations with consumers by communicating this strength in-store to drive carrot sales (e.g. carrot the staple family vegetable, because it lasts).

2.

Insight:

Trend towards increased awareness of carrot types.

Recommendation:

Continue clear labelling of carrot types, especially in mainstream retailers, where the majority of consumers' purchase carrots.

3.

Insight:

Carrots remained one of the most purchased vegetables, yet had low importance to consumers.

Recommendation:

Educate consumers on versatility of carrots and promote alternative carrot products, such as sauces and dairy, which are popular global new product trends.

Cauliflower Grower Action Plan

Category health measures remained low, especially importance and interest in new varieties.

1.

Insight:

Cauliflower suffers from significant consumer quality perceptions in off-season months.

Recommendation:

Fight seasonal purchase barriers of cauliflower by communicating health and nutritional benefits of cauliflower in-store.

2.

Insight:

Innovative products being launched containing cauliflower as an ingredient is very low.

Recommendation:

Communicate the unique health benefits of cauliflower as an ingredient (and its versatility) to trade in order to help promote product innovation using cauliflower.

3.

Insight:

Awareness of cauliflower types remained very low.

Recommendation:

Promote versatility and additional health benefits of coloured cauliflower types. This should encourage interest and awareness of these varieties and in turn increase consumption.

Pumpkin Grower Action Plan

66% Consumers' indicated that taste was the dominant trigger to future purchase.

1.

Insight:

Trend towards increased recalled last spend and decreased value for money.

Recommendation:

Explore trans-seasonal varieties that can provide taste and quality that consumers are accustomed to in peak season, which will increase value for money and satisfaction.

2.

Insight:

Expense was one of the main barriers to purchase.

Recommendation:

Drive larger sized purchases of pumpkin in-store to help drive value in purchase. Also consider more bundling in-store with other products to help grow value (e.g. roast packs).

3.

Insight:

Pumpkin typically cooked in Australian cuisine and accompanied with potatoes.

Recommendation:

Promote alternative cuisines and cooking methods, such as Asian, to increase usage of commodity in consumer's cooking repertoire.

Wave 9: Fact Base
(1 of 2)

Pumpkin:

- Pumpkin category health measures; importance, satisfaction, endorsement and interest in new varieties were on trend with Harvest commodity means.
- Pumpkins were purchased 3.2 times per month and consumed 8.5 times per month, which was on trend with previous waves.
- Pumpkins were typically purchased from mainstream retailers and specialist retailers.
- On average consumers’ purchased 1.5kg, which was on trend with Wave 1 and 5. Average spend was slightly higher at $3.50 and was perceived good value for money. Pumpkins were typically purchased in half formats, also on trend with previous waves.
- Price tracking showed that prices varied little by state or retailer, and the average price was $3.56/kg.
- Butternut pumpkin and Jap pumpkin had the highest recall of pumpkin varieties. However, one fifth of respondents were unable to recall a type of pumpkin.
- Triggers to purchase remained taste and nutrition. Expense was a primary barrier to purchase.
- Pumpkin was expected to stay fresh for over 12 days, which was consistent with previous waves. Overall, this freshness was typically met.

Carrot:

- Carrots had low importance to consumers and low interest in new varieties compared with Harvest commodity means. However, there was strong future intent to continue purchasing carrots.
- On average carrots were purchased 4.3 times per month and consumed 14.2 times per month, which was on trend with Waves 1 and 5.
- Similar to previous waves, 1.2kg of carrots was typically purchased. Recalled last spend was $2.50. Overall, carrots had good value for money.
- Pricing analysis revealed consistent price across state and retailer. Nationally the average price was $2.09/kg, which was comparable to previous waves.
- Awareness of carrot types remained low. Varieties with the highest recall were purple, orange and baby carrots.
- Key triggers to purchase were health and nutrition, whilst barriers to future purchase were respondents purchasing enough for their needs.
- Australian and Chinese cuisine were the most commonly cooked and carrots were most likely to be consumed for dinner.
- Carrots were expected to stay fresh for 12 days, slightly lower than previous waves. A quarter of consumers said this freshness was always met.

Wave 9: Fact Base

(2 of 2)

Cauliflower:

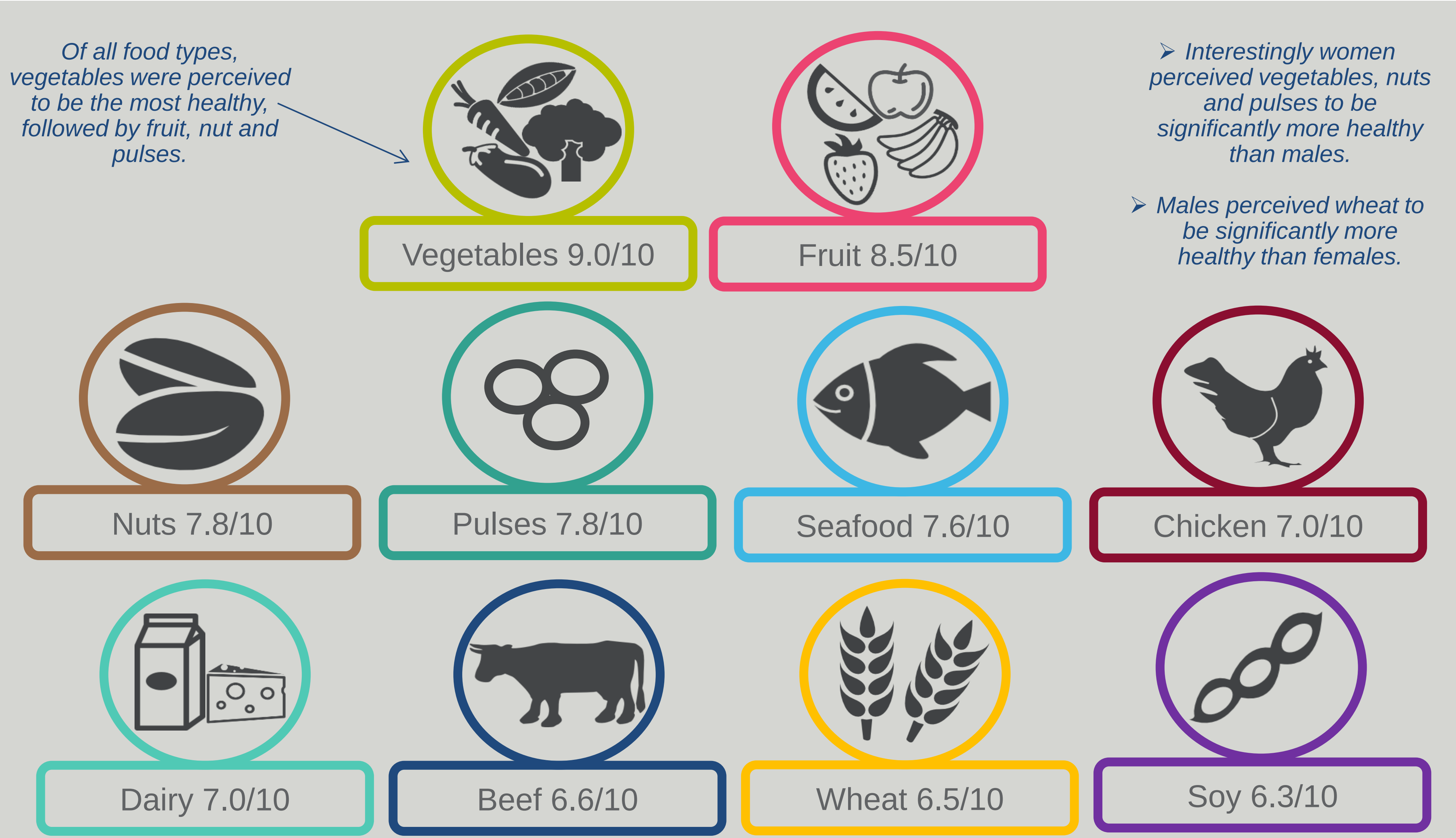
- Cauliflower category health measures were very low, especially importance of cauliflower and interest in new varieties, this was comparable to previous waves.
- Consumers' typically purchased cauliflower 3.0 times per month and consumed 7.8 times per month, which was consistent with Waves 1 and 5. Purchase was typically from mainstream retailers, Coles and Woolworths.
- Trends indicated an increased recalled last spend over the three waves and a trend towards decreased perceived value for money. Respondents typically purchased whole formats of cauliflower.
- Price analysis revealed consistent price across retailers, however there was variability between states. The national average retail price was $3.92 each, which was higher than June and October pricing analysis.
- Price tracking showed that cauliflowers were on special in Coles in NT, SA and QLD, which led to a large price range in this wave. The average price was $3.18 each.
- Key triggers to purchase cauliflower were health and convenience. Top barrier to purchase was expense, which had increased from previous waves.
- Cauliflowers were expected to stay fresh for over 8 days, and expectations of freshness were typically met.

French & Runner Beans:

- Beans had a strong interest in new varieties and future purchase intent, however lower than average satisfaction levels.
- Beans were purchased 3.7 times per month and consumed on average 8.4 occasions per month. This was consistent with previous waves.
- Consumers typically purchased 600g of beans per shop, which was on trend with Wave 5. Individual beans were most often purchased. Recalled last spend had increased to $3.50 per shop. Perceived value for money was slightly lower, and was deemed relatively fair by consumers.
- Price tracking indicated a consistent price per kg, $5.88 nationally. There was a retail price range of $4.00 per kg, which was the smallest of all waves.
- Awareness of bean types was very low, with over half respondents unable to recall a variety. This was on trend with previous waves.
- Main triggers to future purchase were health, convenience and adding variety to their diet. Expense and short shelf life were key barriers to purchase.
- Consumers expected beans to remain fresh for a week after purchase, this was slightly lower than previous waves. Similarly, expectations always being met were also less than Wave 1 and 5.

Wave 9:
Ad-Hoc Questions

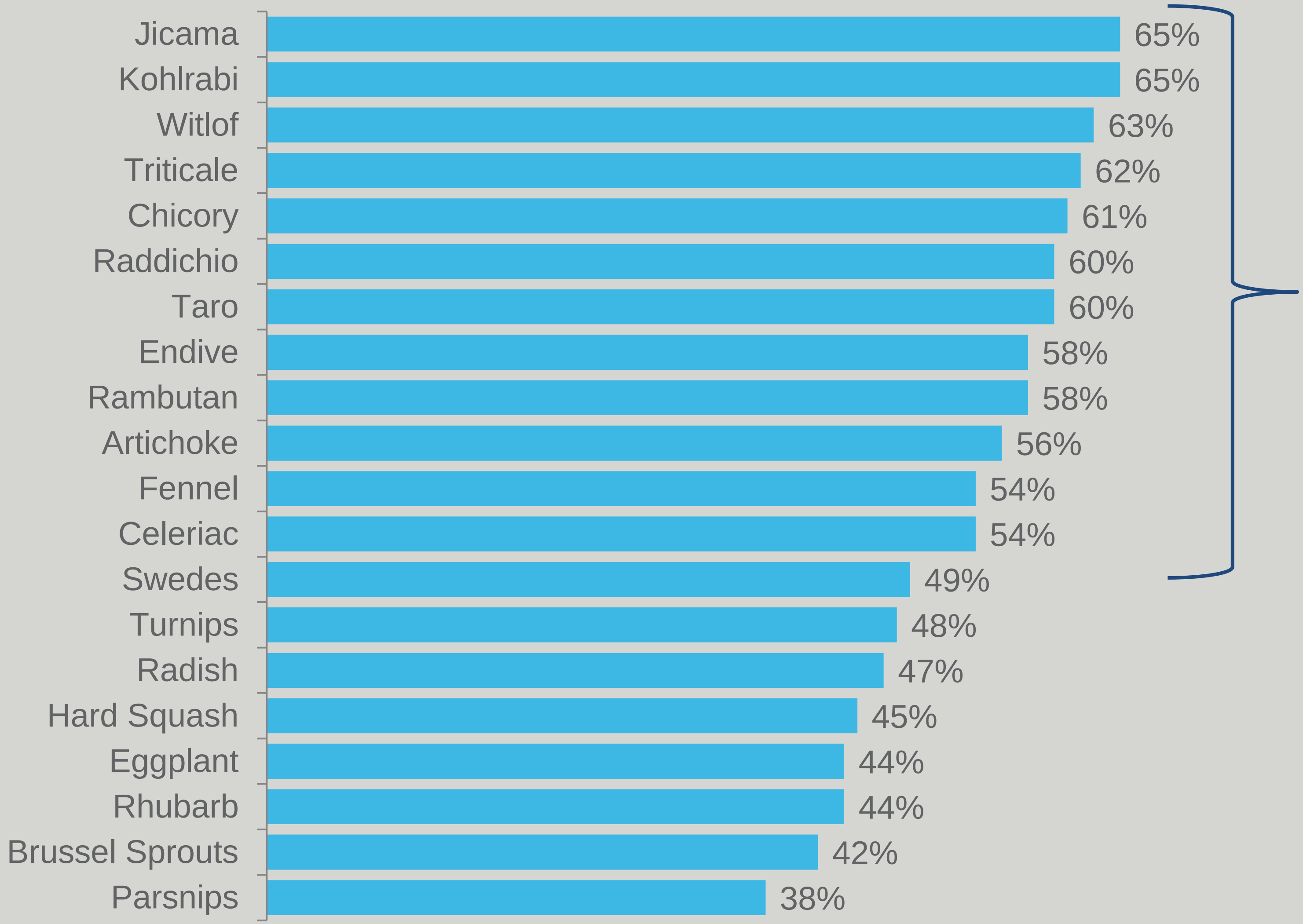
Perceived Health of Food Types



N=586

AHQ1. Please rate how healthy you think each of the following food types are for you.

Vegetables That Children Rarely Consume



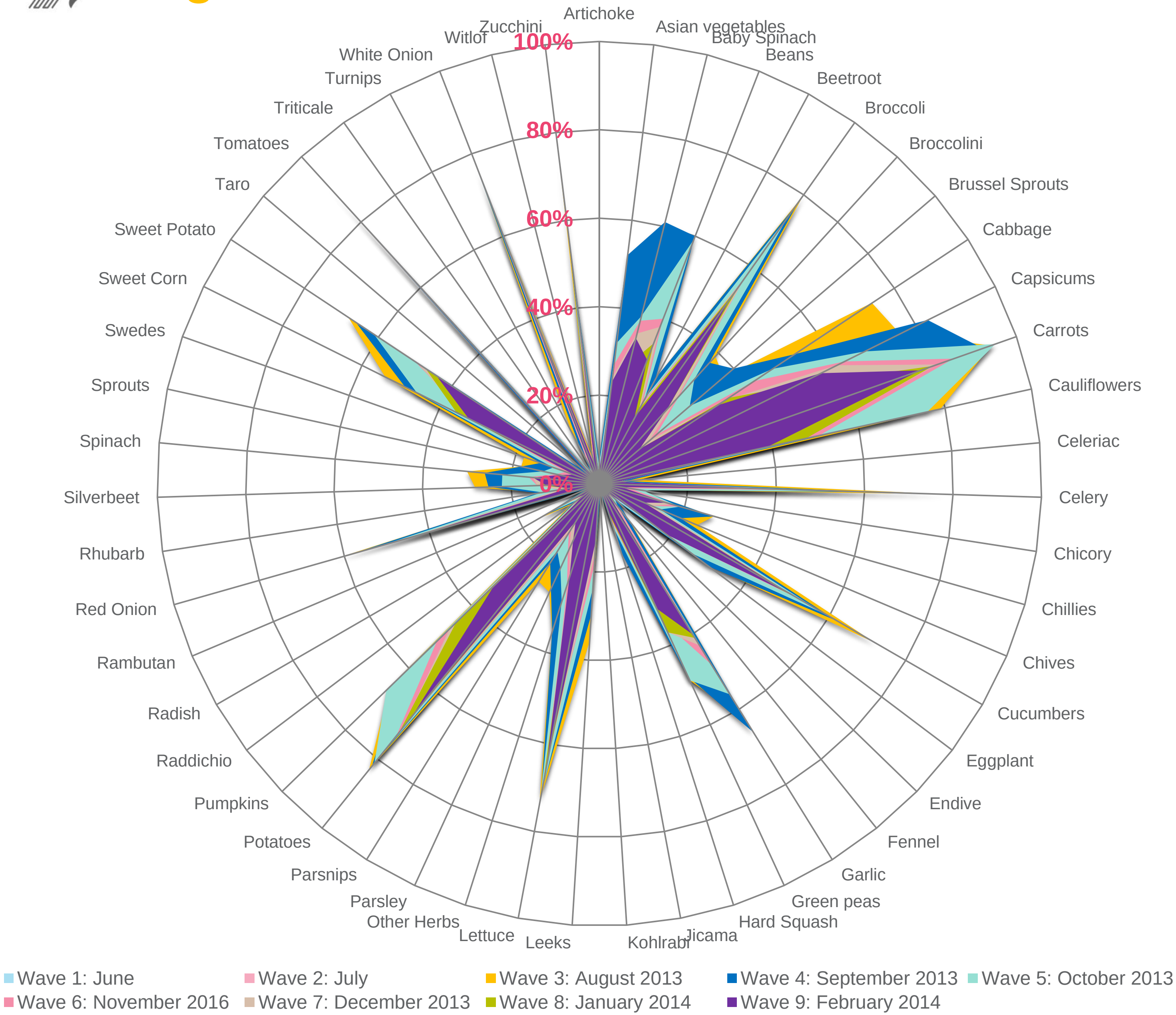
A lot of the vegetables that children rarely consume have distinctive flavours, especially bitterness.

Some of these vegetables are not in adults repertoire and are therefore less likely to be consumed as well.

Total N=418 (N=168 did not have children)
AHQ2. Please select the vegetables, if any, that your children never/rarely consume?

Wave 9: Overall Vegetable Tracking

Vegetables Purchased Last Month



- The current wave, February 2014, showed an overall decrease in purchase of vegetables compared with previous months.
- Tomatoes, carrots, potatoes and lettuce were the most purchased vegetables this wave.

Sample Wave 9 N=1470
S8. Which of the following fresh vegetables have you purchased in the last month?

colmar brunton.

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.

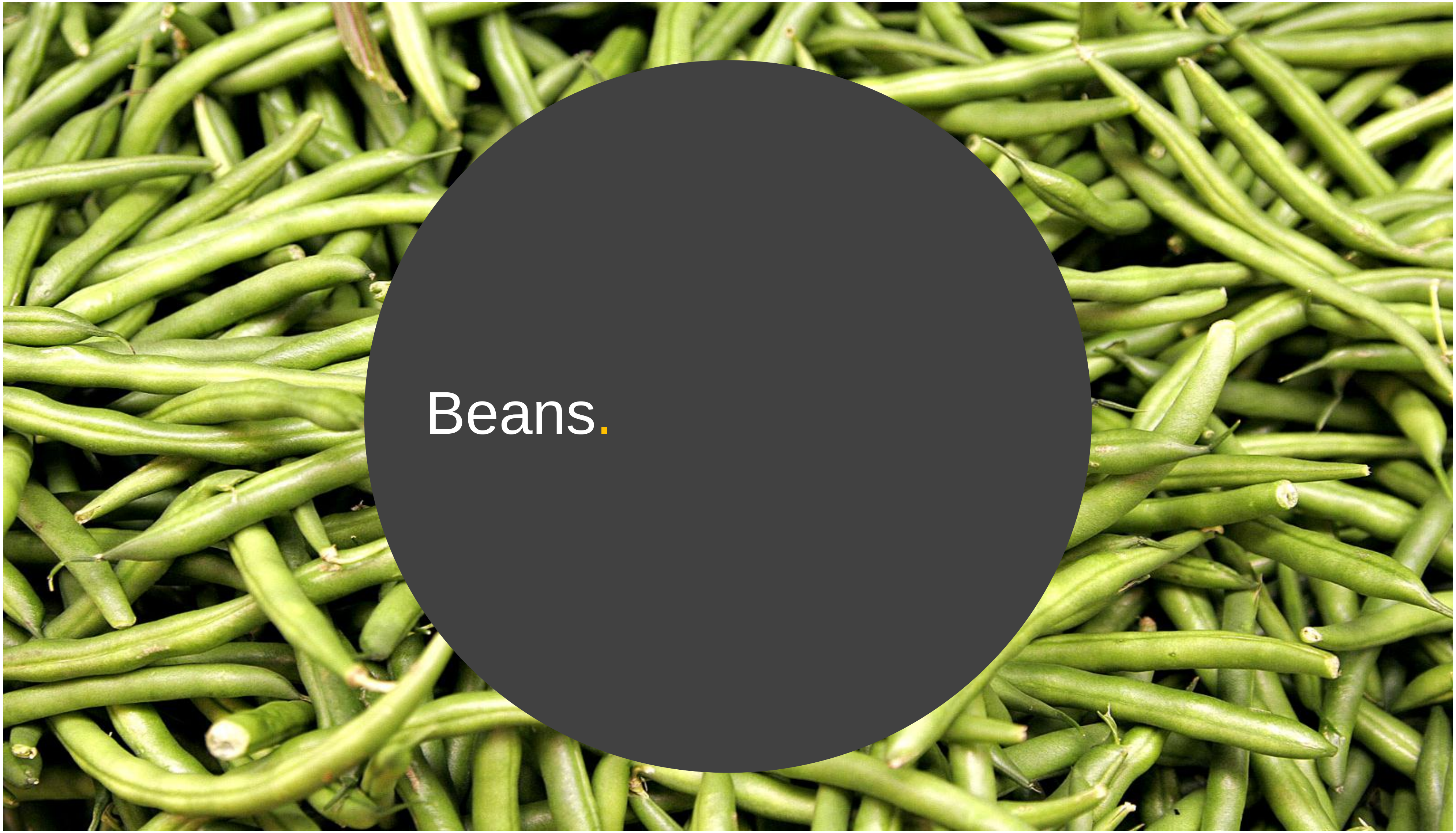
- How **important** to you is having a range of *commodity* available in the store where you usually shop?
- How **satisfied** or dissatisfied are you with the range of *commodity* currently available?
- How likely would you be to **recommend** *commodity* to your family and friends?
- How interested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

Category Health

- Pumpkin had strong category health measures including future purchase intent. This may be due to seasonality, coming into cooler months and greater availability.
- Importance of carrots and increased future purchase intent was relatively low compared with the Harvest mean. However, carrots consistently remain one of the most purchased vegetables each wave, indicating they are a vegetable staple in most households.
- Importance, endorsement and interest in new varieties of cauliflower were all low. These measures were consistent with previous Waves (1 and 5) and indicate consumers' ambivalence to the vegetable.
- Consumers' satisfaction with beans remained consistently low, yet future purchase intent was on trend with Harvest means.

	Beans	Carrot	Cauliflower	Pumpkin	Harvest Total Mean
Importance	6.4	5.5	4.9	6.6	6.3
Satisfaction	6.1	6.6	6.5	6.7	6.6
Endorsement	6.6	6.9	6.4	7.0	6.8
Interest (New Varieties)	6.4	5.7	5.4	6.2	6.1
Future Purchase					
More	15%	10%	13%	15%	13%
Same	82%	89%	85%	84%	85%
Less	3%	1%	1%	1%	2%

Beans.



Purchase and Consumption Behaviour

Average Purchase 3.7 times per month

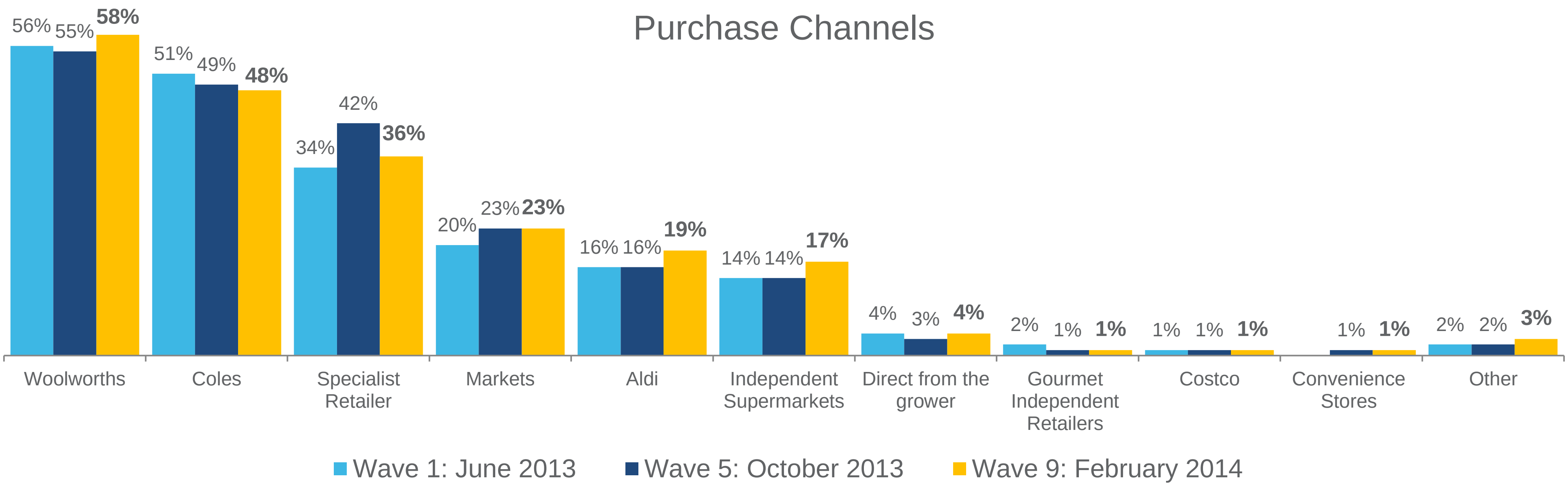
- ▲ 3.8 times, Wave 1
- ▼ 3.6 times, Wave 5

Average Consumption 8.4 times per month

- ▼ 8.0 times, Wave 1
- ▼ 8.3 times, Wave 5

⇛ Mainstream retailers remained the primary purchase channel of beans. The current wave showed a trend of increased purchase from Aldi and Independent Supermarkets.

⇛ Purchase and consumption frequency were consistent with previous waves. On average beans were purchased once per week and consumed twice per week.



Q1. On average, how often do you purchase French and runner beans?
Q2. On average, how often do you consume French and runner beans?
Q5. From which of the following channels do you typically purchase French and runner beans?
Sample Wave 1 N=506, Wave 5 N=346, Wave 9 N=307
* Indicates significantly higher scores between Waves

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

Average Spend and Price Sensitivity

Average weight of purchase

The typical consumer purchased **600g** of beans, which was on trend with October purchase habits.

▲ 900g, Wave 1
▬ 600g, Wave 5

Recalled last spend

Recalled last spend on bean purchase was **$3.50.** Although not significant, there is a trend towards increased last spend.

▼ $3.10, Wave 1
▼ $3.30, Wave 5

Value for money

Consumer's perceived value for money was relatively fair **(6.1/10)**, consistent with previous waves.

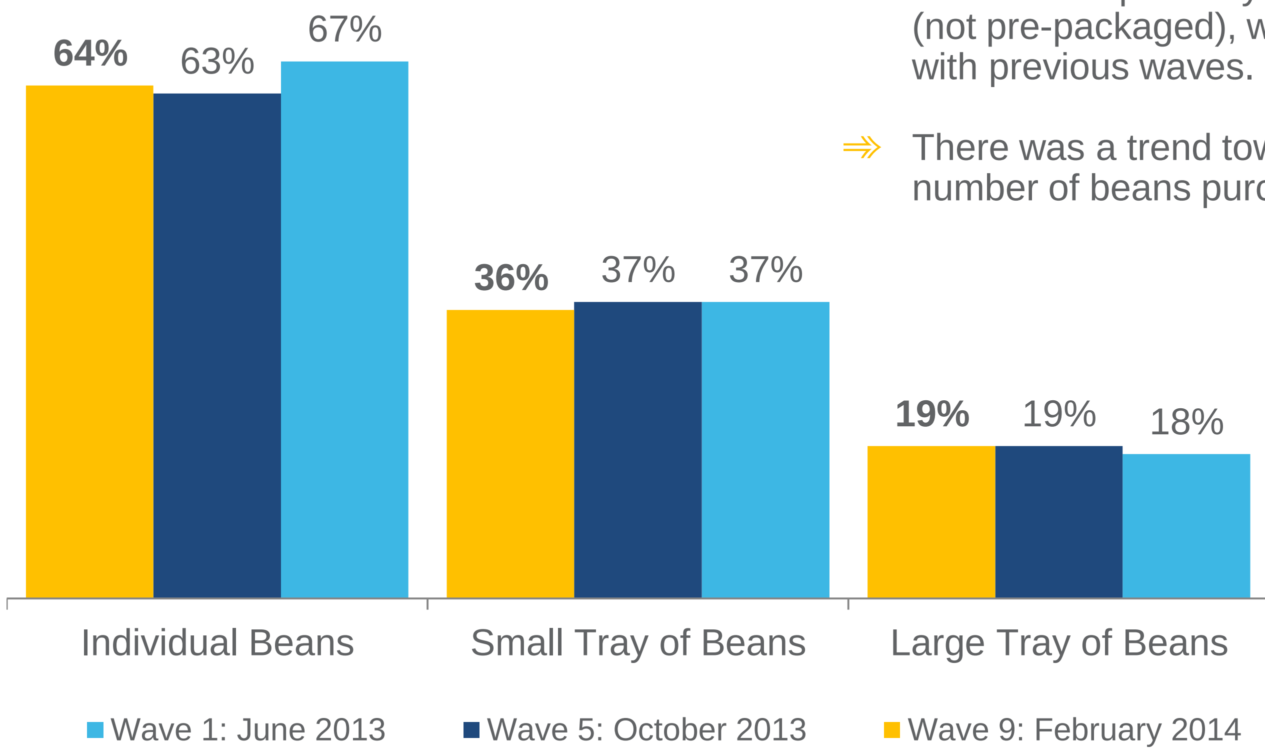
▲ 6.3/10, Wave 1
▲ 6.2/10, Wave 5

Q3. How much French and runner beans 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 1 N=506, Wave 5 N=346, Wave 9 N=307

colmar brunton.

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

Pack Formats Purchased



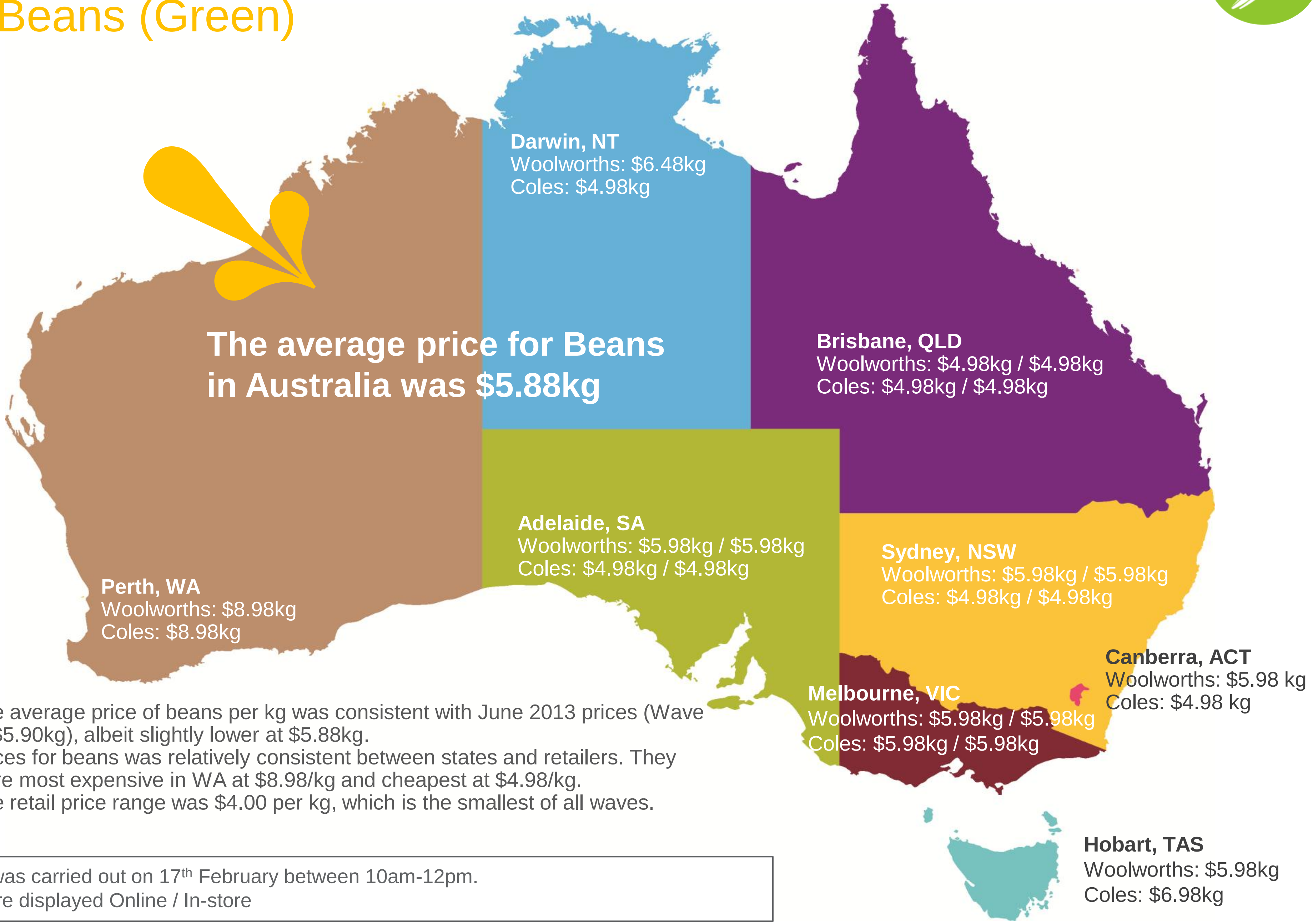
- Beans were primarily purchased individually (not pre-packaged), which was consistent with previous waves.
- There was a trend towards increased number of beans purchased per shop.

Average number purchased	Individual Beans	Small Tray	Large Tray
Wave 1: June 2013	66.2	1.2	1.3
Wave 5: October 2013	73.0	1.1	1.1
Wave 9: February 2014	76.6	1.5	1.5

Q3a. How much French and runner beans does this typically equate to?
Sample Wave 1 N=506, Wave 5 N=346, Wave 9 N=307

Online and In-store Commodity Prices

Beans (Green)

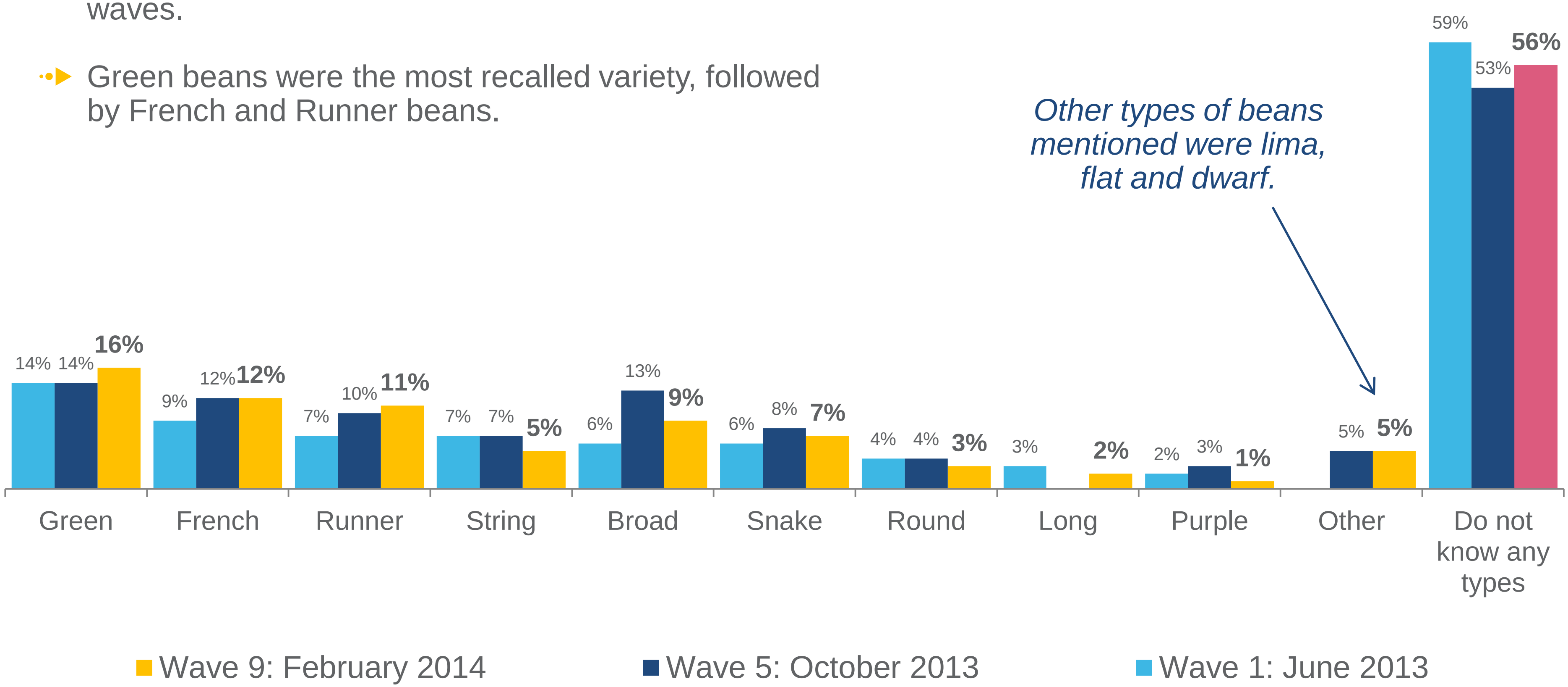


- The average price of beans per kg was consistent with June 2013 prices (Wave 1, $5.90kg), albeit slightly lower at $5.88kg.
- Prices for beans was relatively consistent between states and retailers. They were most expensive in WA at $8.98/kg and cheapest at $4.98/kg.
- The retail price range was $4.00 per kg, which is the smallest of all waves.

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

Spontaneous Varietal Awareness

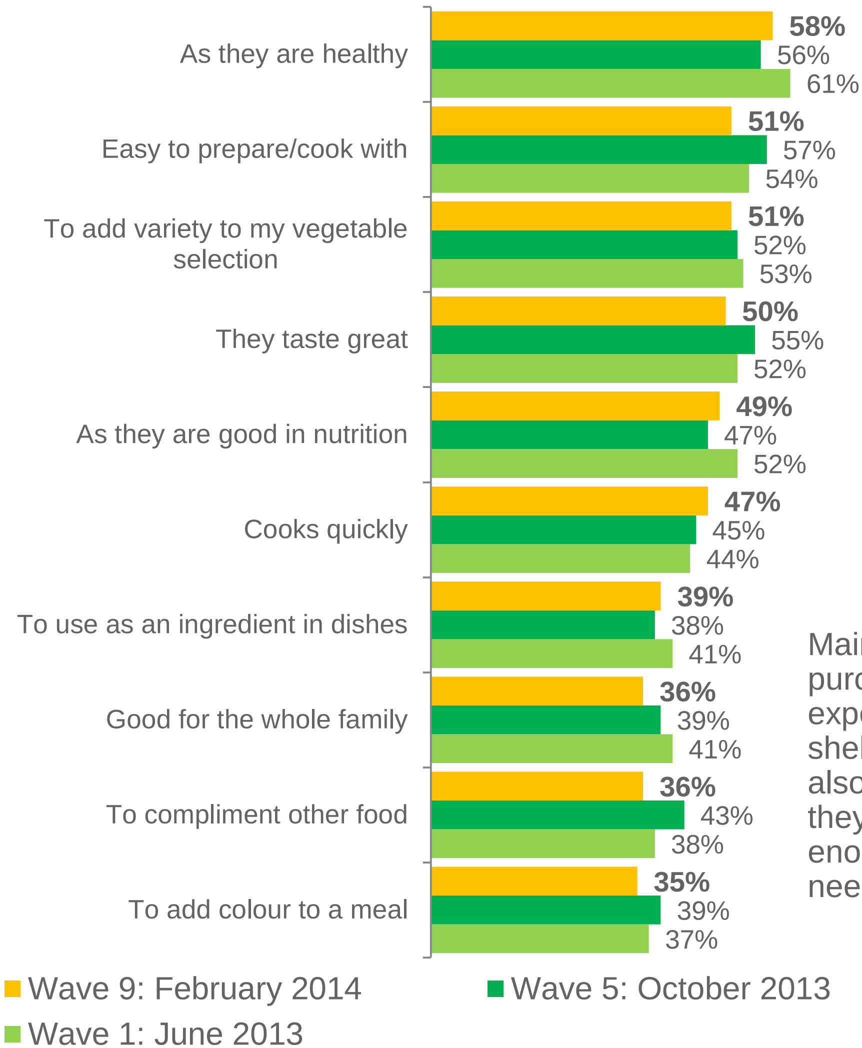
- Over half of the respondents were unable to recall any type of green bean, which was in line with previous waves.
- Green beans were the most recalled variety, followed by French and Runner beans.



Q6a. What varieties/types of French and runner beans are you aware of? (unprompted)
Sample Wave 1 N=506, Wave 5 N=346, Wave 9 N=307
* Indicates significantly higher scores between Waves

Triggers & Barriers to Purchase

Triggers

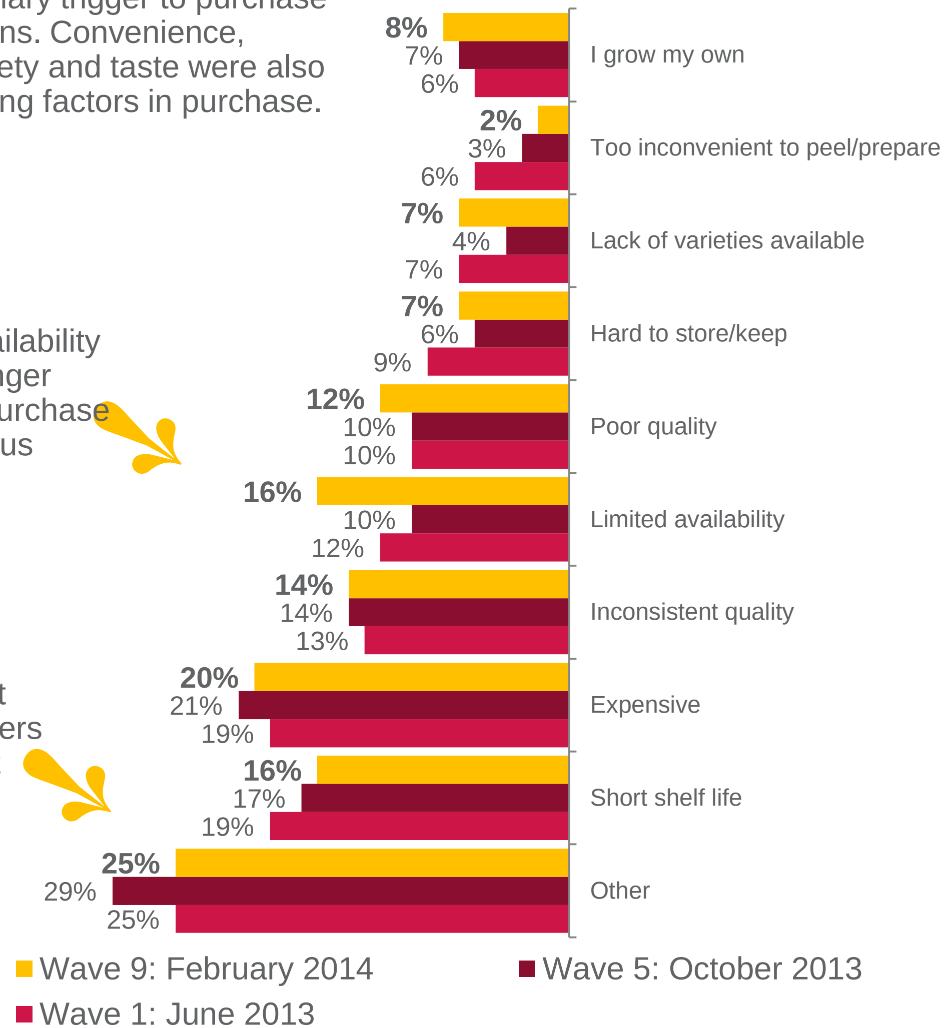


Health remained the primary trigger to purchase beans. Convenience, variety and taste were also strong factors in purchase.

Limited availability was a stronger barrier to purchase than previous waves.

Main barriers to purchase were expense and short shelf life. Consumers also indicated that they purchase enough for their needs.

Barriers



Q7. Which of the following reasons best describes why you purchase French and runner beans?
Q8. Which reason best describes why you don't buy French and runner beans more often?
Sample Wave 1 N=506, Wave 5 N=346, Wave 9 N=307
* Indicates significantly higher scores between Waves

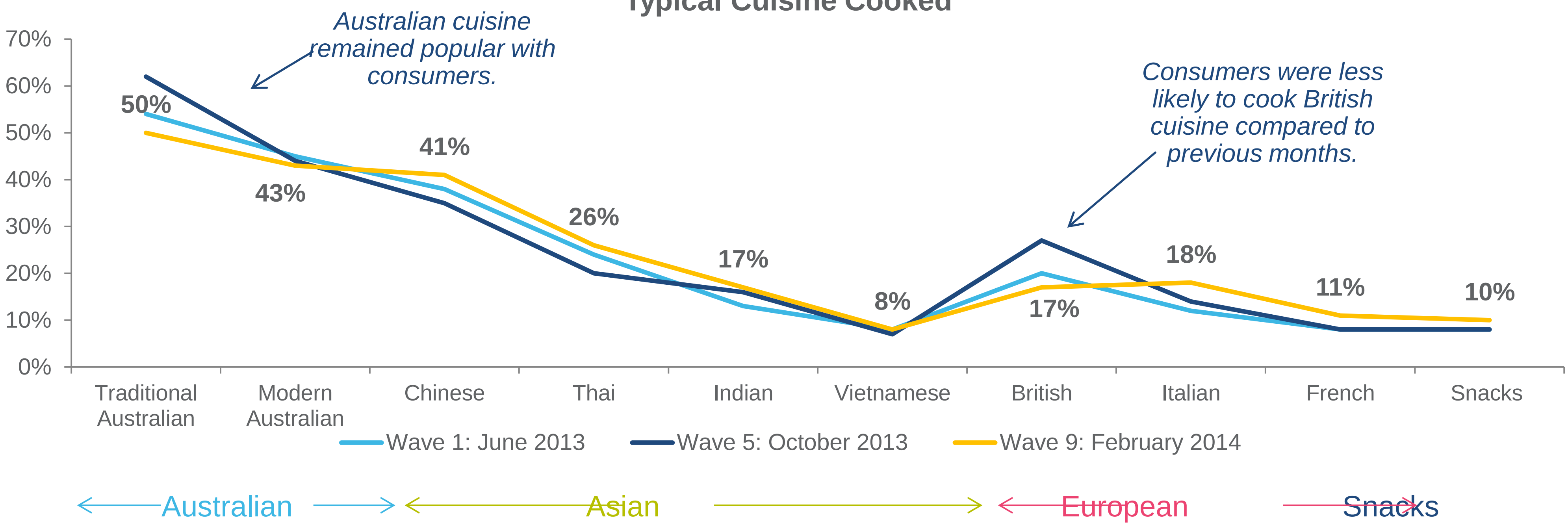
Cooking Cuisine & Occasions

- Dinner remained the primary consumption occasion of beans.
- Australian cuisine (traditional and modern) were most commonly cooked.
- There was a trend across waves for increased frequency of Asian cuisine being cooked.

Wave 9 Top 5 Consumption Occasions

Weekday dinner	**64%**	▼ Wave 1	▼ Wave 5
Weekend dinner	**38%**	▲ Wave 1	▲ Wave 5
Family meals	**37%**	— Wave 1	▼ Wave 5
Every-day meals	**33%**	▼ Wave 1	▲ Wave 5
Quick meals	**24%**	▲ Wave 1	▲ Wave 5

Typical Cuisine Cooked



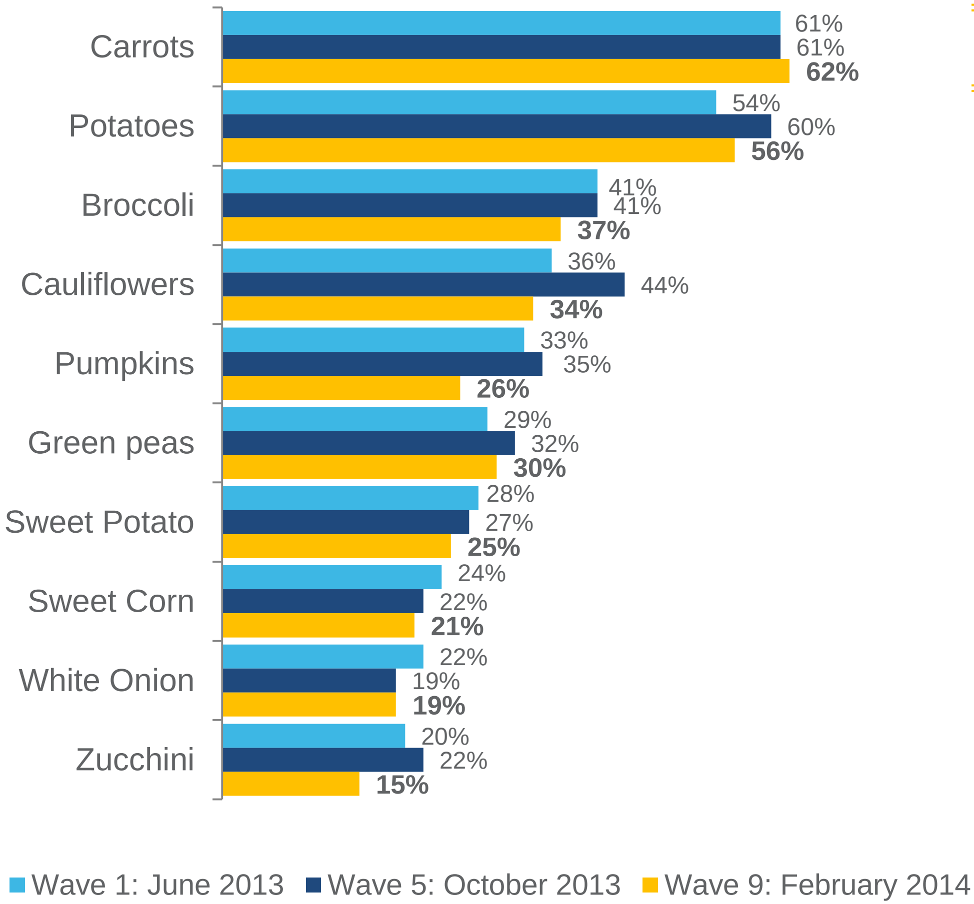
Sample Wave 1 N=506, Wave 5 N=346, Wave 9 N=307
Q9. How do you typically cook French and runner beans?
Q10. What cuisines do you cook/consume that use French and runner beans?
Q10a. And when are you serving French and runner beans which of the following do you also serve together with this?
Q11. Which of the following occasions do you typically consume/use French and runner beans?
* Indicates significantly higher scores between Waves

colmar brunton.

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

Cooking Preferences

Top 10 Accompanying Vegetables



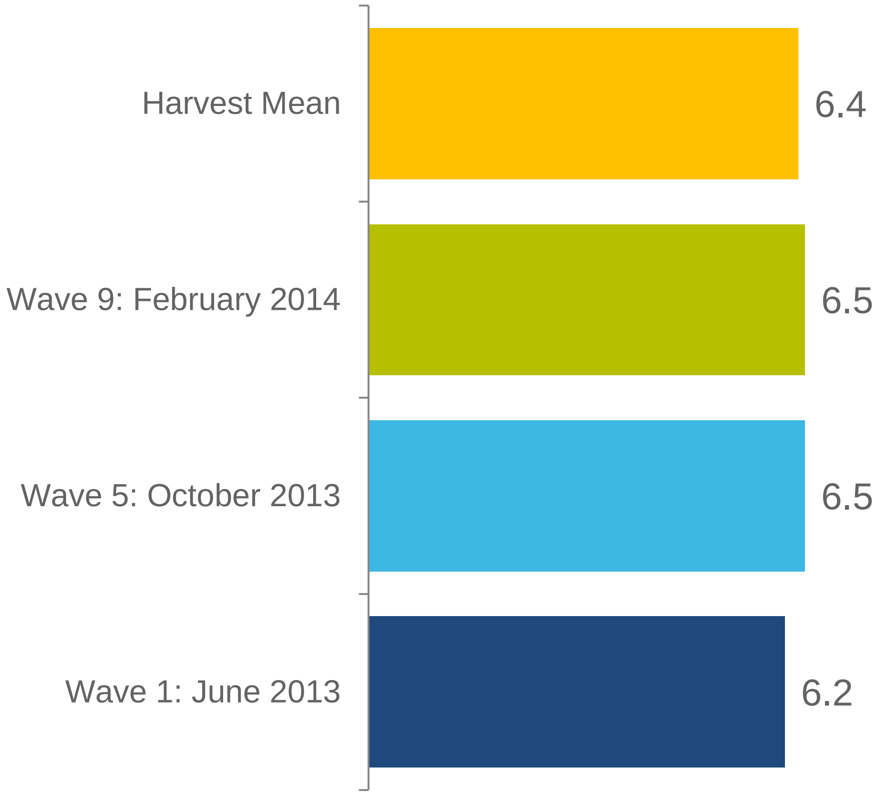
- Beans were consistently cooked with carrots and potatoes.
- Wave 9 indicated a trend towards decreased use of broccoli, pumpkin and zucchini with beans.
- Steaming and stir-frying were the most common cooking techniques stated for Green bean usage.

Top 10 Cooking Styles			
	Wave 1	Wave 5	Wave 9
Steaming	**55%**	**52%**	**56%**
Stir frying	**47%**	**44%**	**50%**
Boiling	42%	42%	35%
Microwave	25%	27%	27%
Soup	16%	12%	13%
Raw	14%	14%	18%
Stewing	12%	9%	12%
Blanche	10%	12%	14%
Sautéing	10%	9%	14%
Frozen	7%	5%	6%

Sample Wave 1 N=506, Wave 5 N=346, Wave 9 N=307
Q9. How do you typically cook French and runner beans?
Q10. What cuisines do you cook/consume that use French and runner beans?
Q10a. And when are you serving French and runner beans which of the following do you also serve together with this?
Q11. Which of the following occasions do you typically consume/use French and runner beans?
* Indicates significantly higher scores between Waves

Importance of Provenance

- Importance of bean provenance was consistent with Wave 5 and the Harvest mean, indicating that consumers remain interested in where their beans are grown.



Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 1 N=506, Wave 5 N=346, Wave 9 N=307

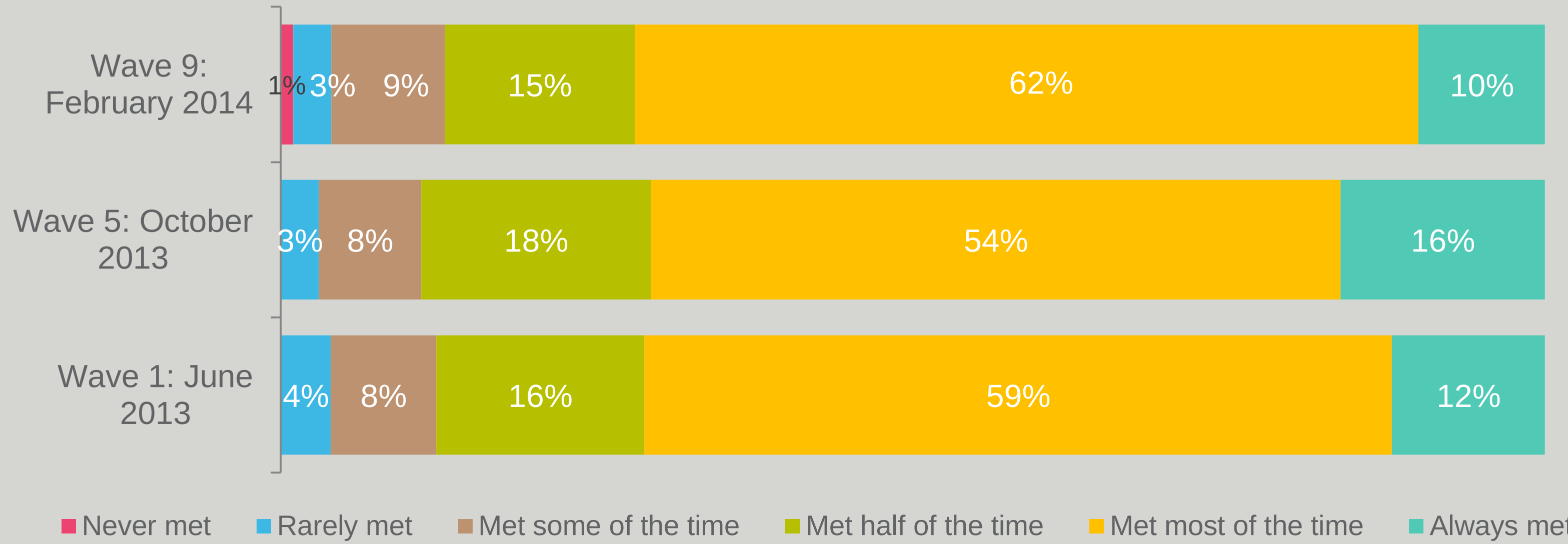
Freshness and Longevity

Expected
To stay
fresh for
6.9 days

▲ 7.3 days, Wave 1
▲ 7.6 days, Wave 5

- Although not significant, there was a trend towards decreased expected freshness by consumers. On average consumers expected beans to stay fresh for one week.
- Further, consumers were less likely to indicate that freshness was always met.

Expectations Met



Q12. How long do you expect French and runner beans to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy French and runner beans?
Sample Wave 1 N=506, Wave 5 N=346, Wave 9 N=307

colmar brunton.

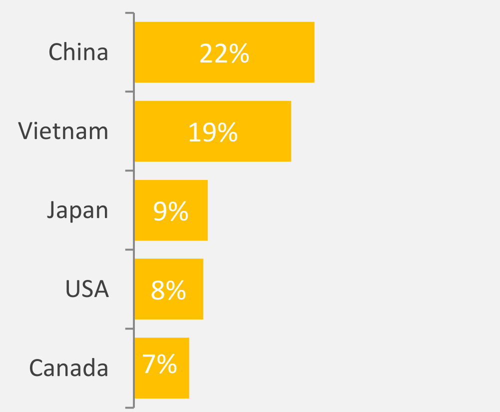
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

French & Runner Bean Product Launch Trends.

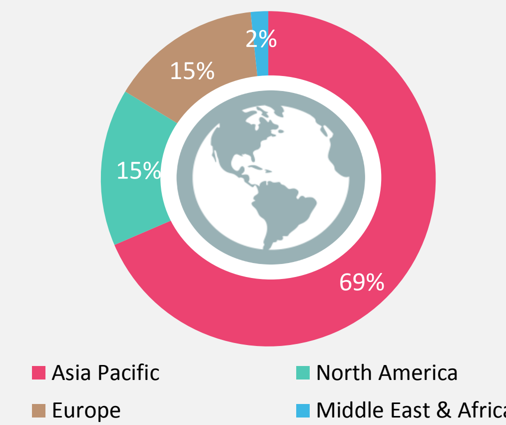
Bean Global NPDs
December–February 2013/14

There were 178 new products launched over the last 3 months that contained French and runner beans as an ingredient.
The majority of launches occurred in the Asia Pacific region.
Top category launches were meals, snacks and bakery goods.

Country

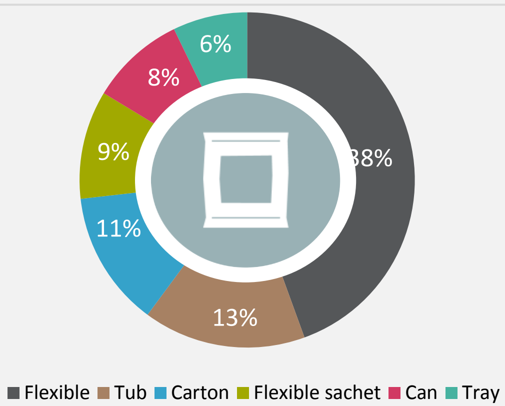


Region



178 Global NPDs

Top Pack Formats



Categories

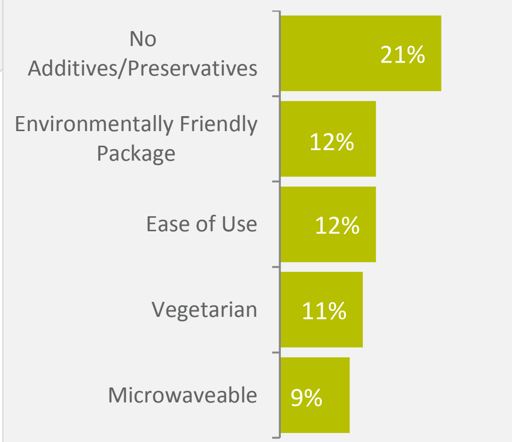
Meals 20%

Snacks 15%

Bakery 15%

Dessert & Ice Cream 9%

Top Claims



French & Runner Beans Product Launches:
Last 3 Months (December–February 2013/14)
Summary

- A total of 178 products containing French and Runner beans as an ingredient were launched globally in the last 3 months, which is considerably lower compared with Wave 5 (235 launches).
- There was only 1 product launched in Australia containing green beans (French & Runner) as an ingredient in Australia (Coles Tuna – Mexican style).
- Asia Pacific and North America continue to be the top 2 regions for product launches.
- Flexible (38%), tub (13%) and carton (11%) packaging were the top 3 pack types being used for product launches in the last 3 months. This is consistent with previous waves tracked.
- The top categories for product launches were meals (20%), snacks (15%) and bakery goods (15%), consistent with top 3 launches in previous wave.
- The core claims used for these launches globally were no additives/preservatives (21%) and environmentally friendly packaging (12%).
- The most innovative launches were green bean icy poles and green bean ice cream (examples of these products can be found in upcoming slides) .

Overall, the launch trends for the last 3 months for French and Runner beans were on par with previous waves, albeit less launches globally than the previous quarter.

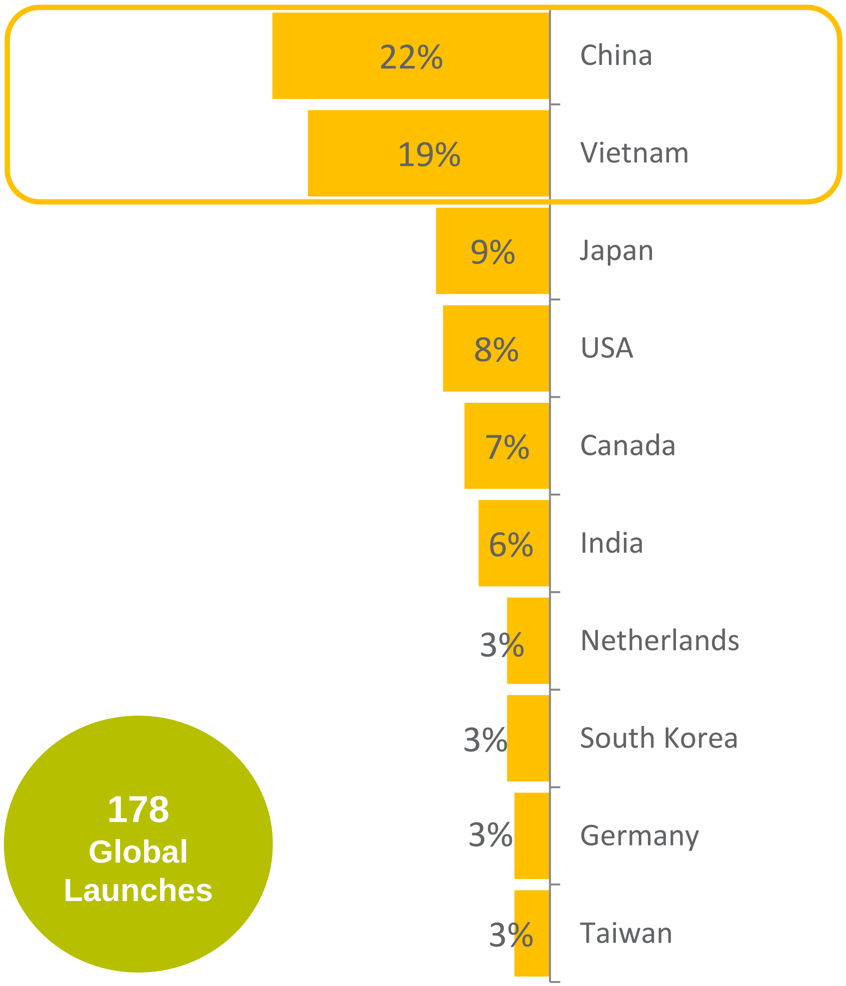
Source: Mintel (2014)

French & Runner Bean Launches

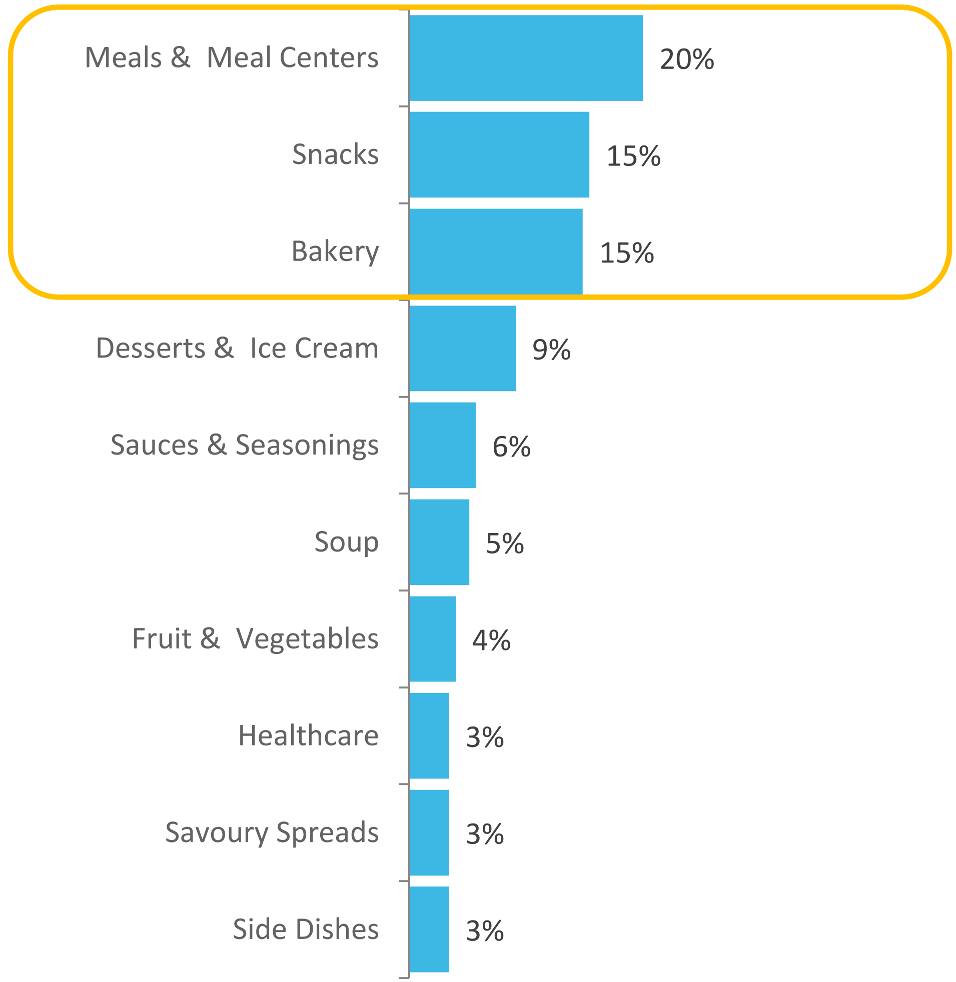
Country, Region & Categories

- China and Vietnam were the top countries where products were launched.
- Meals, snacks & bakery products were the top categories of products launched for this period.

Top Launch Countries



Top Launch Categories



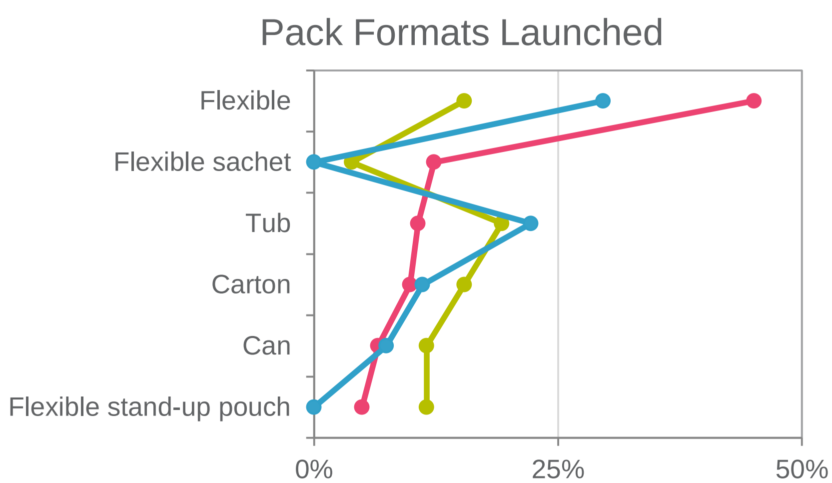
colmar brunton.

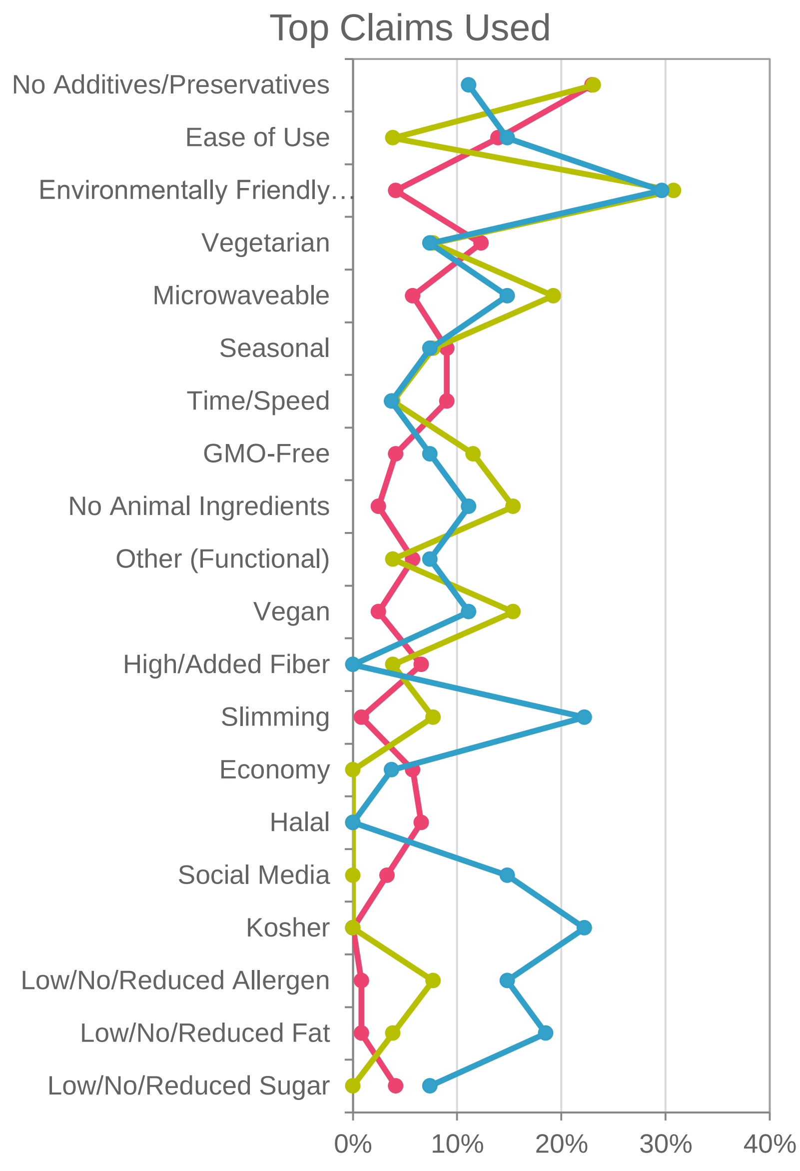
Number of Global Beans NPDs for the L3M N=178

French & Runner Bean SKUs

Top Claims & Pack Formats Used

- Claims for products launched in the last 3 months differ between North America and Asia Pacific regions. The top claims for North America were slimming and Kosher whilst in the Asia Pacific no additives, microwaveable and vegan were the top claims. Environmentally friendly packaging was a consistent claims across both of these regions.
- Globally the top pack formats used product launches was flexible packaging and tubs.





Number of Global NPDs for the L3M N=235
Only regions with n >20 are displayed

Innovative French & Runner Bean Launches:
L3M (December–February 2013/14)

Fine Food Green Tea Mousse Cake (China)

Fine Food Lv Cha Mu Si Dan Gao (Green Tea Mousse Cake) is said to be silky smooth and soft. This product retails in a 680g pack containing 10 pieces.

Claims:
None available.

Cherie Dolce Japanese Sweets Wagokoro Matcha Green Tea & Double Cream Mochi Rice Cake (Japan)

The product is soft rice cake filled with double cream, with azuki beans and matcha paste.

Claims:
Seasonal

Pasco Uji Matcha & Azuki Danish Bun (Japan)

Pasco Uji Matcha & Azuki Danish Bun is matcha green tea cake with azuki paste. Only available in eastern Japan.

Claims:
Cobranded, Seasonal, Premium, Limited Edition, Microwaveable

Guan Zhu Green Bean Vermicelli (China)

Guan Zhu Lv Dou Fen Si (Green Bean Vermicelli) is made with quality green bean and processed using advanced technique and equipment. This product is claimed to be smooth, delicate and chewy. The vermicelli retails in a 400g pack.

Claims:
None available.

Source: Mintel (2014)

Innovative French & Runner Bean Launches:
L3M (December–February 2013/14)

Lifeway Tart and Tangy Green Tea and Raspberry Flavoured Frozen Kefir Bars (USA)

Lifeway Tart and Tangy Green Tea and Raspberry Flavoured Frozen Kefir Bars are new to the range. These bars contain 10 x live and active probiotic cultures, which can help rev up immunity and digestion, feature milk that contains no artificial growth hormones, such as rBST or rBGH, and contain only 56 calories each.

Claims:
Low/No/Reduced Lactose, All Natural Product, Low/No/Reduced Allergen, GMO-Free, Low/No/Reduced Calorie, Ethical - Environmentally Friendly Package, Kosher, Immune System (Functional), Slimming, Gluten-Free, Social Media, Digestive (Functional), Hormone Free

MasterKong 3+2 Matcha and Red Bean Flavoured Soda Sandwich (China)

MasterKong 3+2 Mo Cha Lv Dou Wei Su Da Jia Xin Bing Gan (Matcha and Red Bean Flavoured Soda Sandwich Biscuits) have been repackaged and are now available in a newly designed 125g pack. This product is QS certified.

Claims:
None available.

Donavi Peeled Green Bean (Vietnam)

Donavi Do Xanh Tach Vo (Peeled Green Bean) is new to the range. This product retails in a 500g pack.

Claims:
None available.

Hung Hai Split Green Beans (Vietnam)

Hung Hai Hat Do Xanh Vo (Split Green Beans) are new to the range. This product is ideal for cooking sweets, sticky rice and making cakes. It retails in a 500g pack.

Claims:
None available.

Source: Mintel (2014)

Innovative French & Runner Bean Launches:
L3M (December–February 2013/14)

Mung Bean, Pork and Spices Filled Glutinous Rice Cake (Vietnam)

This ready-to-eat product is said to be a delicious product of Uoc Le village.

Claims:
Ease of Use

Big C Green Bean Ice Cream (Vietnam)

Big C Kem Dau Xanh (Green Bean Ice Cream) is now available. This product retails in a 600g pack.

Claims:
None available.

Wa Bao Le Mung Bean Flavoured Ice Stick (China)

Wa Bao Le Lv Dou Xiang Bing (Mung Bean Flavoured Ice Stick) is QS certified. This product retails in a 70g pack.

Claims:
None available.

Kraft Philadelphia Light Garden Vegetable Cream Cheese (Canada)

This kosher certified product contains 41% less fat than the regular Philadelphia Garden Vegetable Cream Cheese Product. It retails in a 250g pack.

Claims:
Kosher, Low/No/Reduced Fat, Slimming

Source: Mintel (2014)

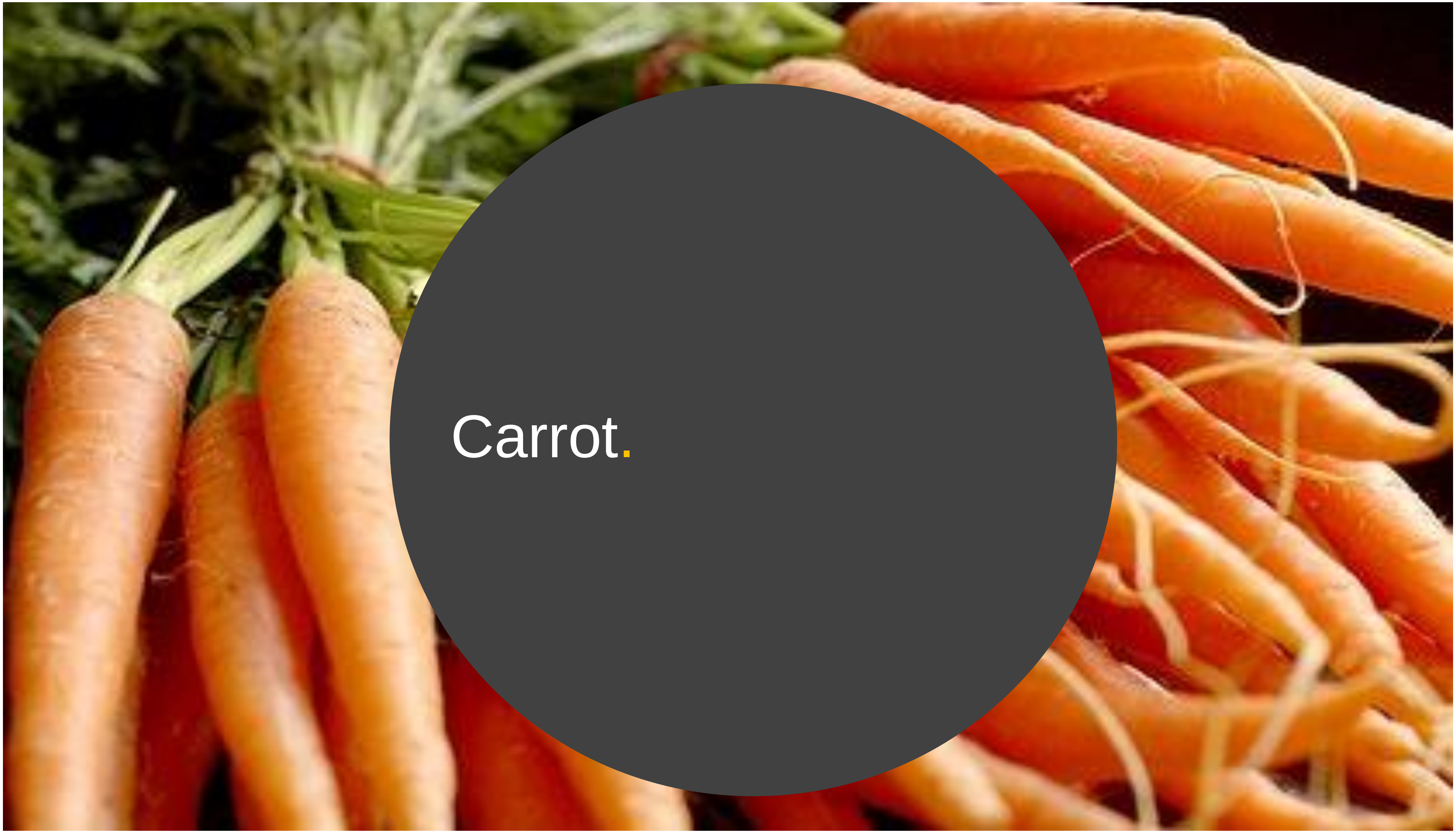
Australian Green Bean Launch:
L3M (December 2013- February 2014)

Coles Mexican Style Tuna

Coles Tuna Mexican Style Tuna is dolphin friendly. The product retails in a 95g recyclable pack.

Claims:
Ethical - Environmentally Friendly Package, Low/No/Reduced Fat, Ethical - Animal

Source: Mintel (2014)



Carrot.

Purchase and Consumption Behaviour

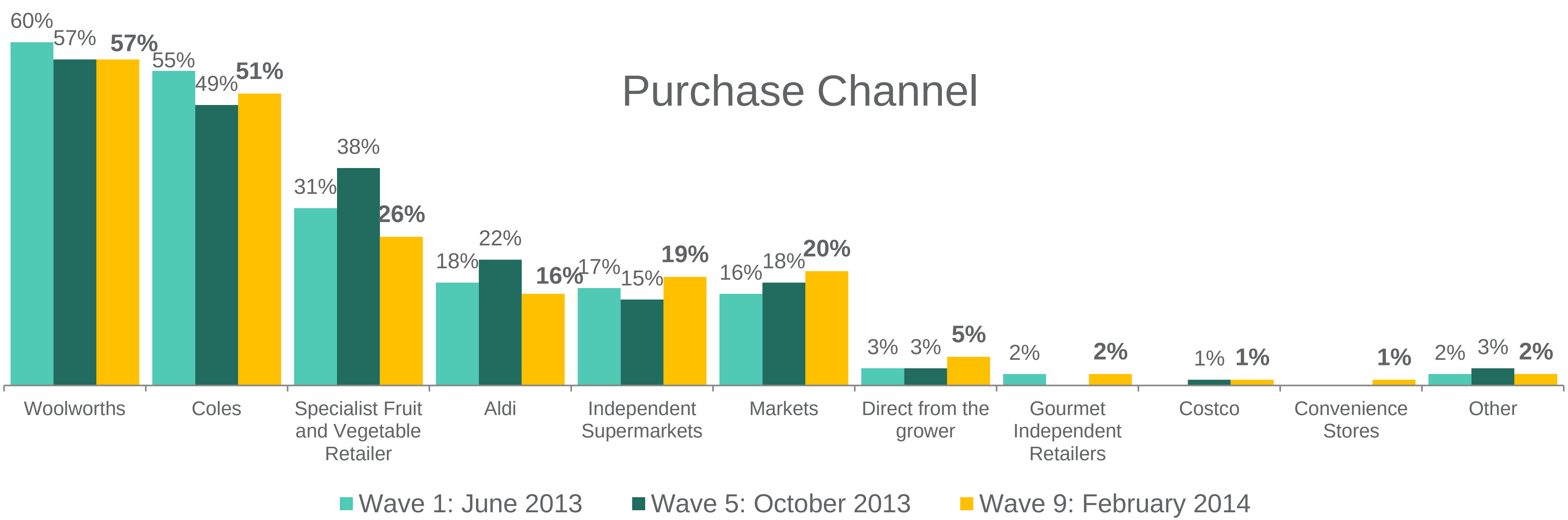
Average Purchase **4.3** times per month

▼ 4.0 times, Wave 1
▼ 3.9 times, Wave 5

Average Consumption **14.2** times per month

▼ 13.8 times, Wave 1
▲ 14.5 times, Wave 5

- Purchase frequency and consumption frequency were consistent and regular, with consumers on average eating carrots every second day.
- Key purchase channels were Woolworths and Coles supermarkets. The current wave indicated a decrease in purchase from specialist retailers and Aldi.
- Overall, there was a trend of increased purchase from markets.



Q1. On average, how often do you purchase carrot?
Q2. On average, how often do you consume carrot?
Q5. From which of the following channels do you typically purchase carrot?
Sample Wave 1 N=511 Wave 5 N=520 Wave 9 N=345
* Indicates significantly higher scores between Waves

colmar brunton.

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

Average Spend and Price Sensitivity

Average weight of purchase

The typical consumer purchased **1.2kg** of carrots, which was in line with previous waves.

— 1.2kg, Wave 1
— 1.2kg, Wave 5

Recalled last spend

Recalled last spend on carrots was **$2.50.** This was consistent with Wave 5.

▲ $3.40, Wave 1
▼ $2.40, Wave 5

Value for money

Consumer's perceived value for money was good **(7.3/10)** and on trend with previous waves.

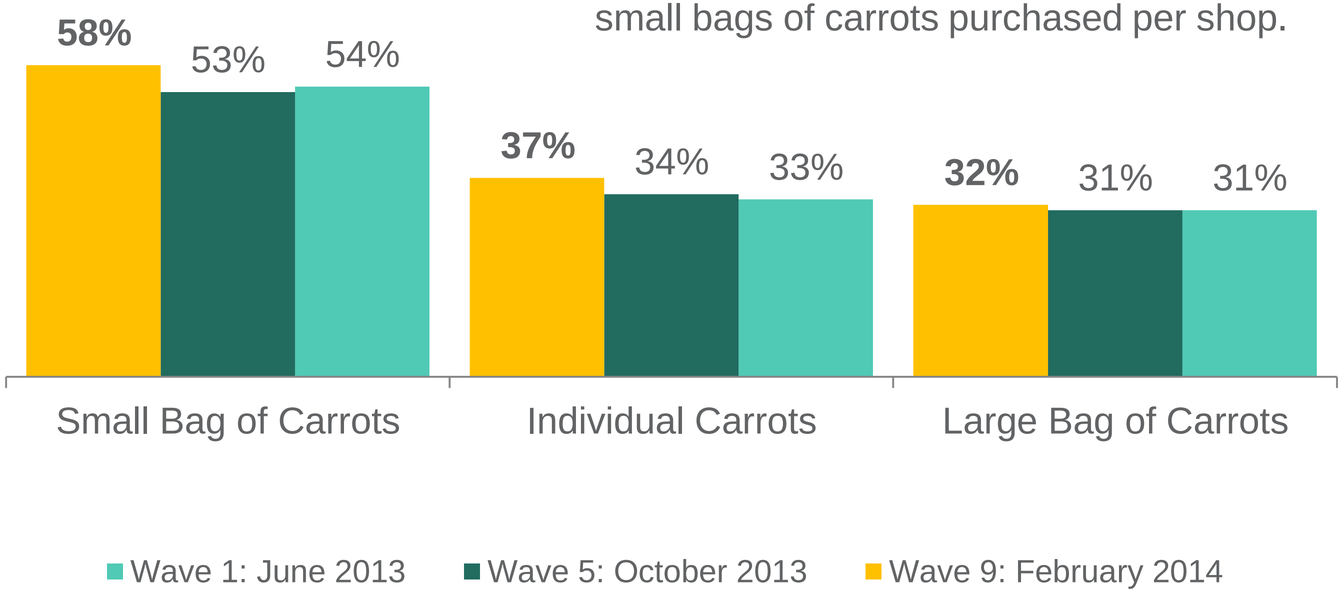
▼ 7.2/10, Wave 1
— 7.3/10, Wave 5

Q3. How much carrot 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 1 N=511 Wave 5 N=520 Wave 9 N=345

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

Pack Formats Purchased

- Purchase formats of carrots was congruent with previous waves. Small bags of carrots remained the most common format purchased.
- Overall, there was a trend towards increased number of small bags of carrots purchased per shop.

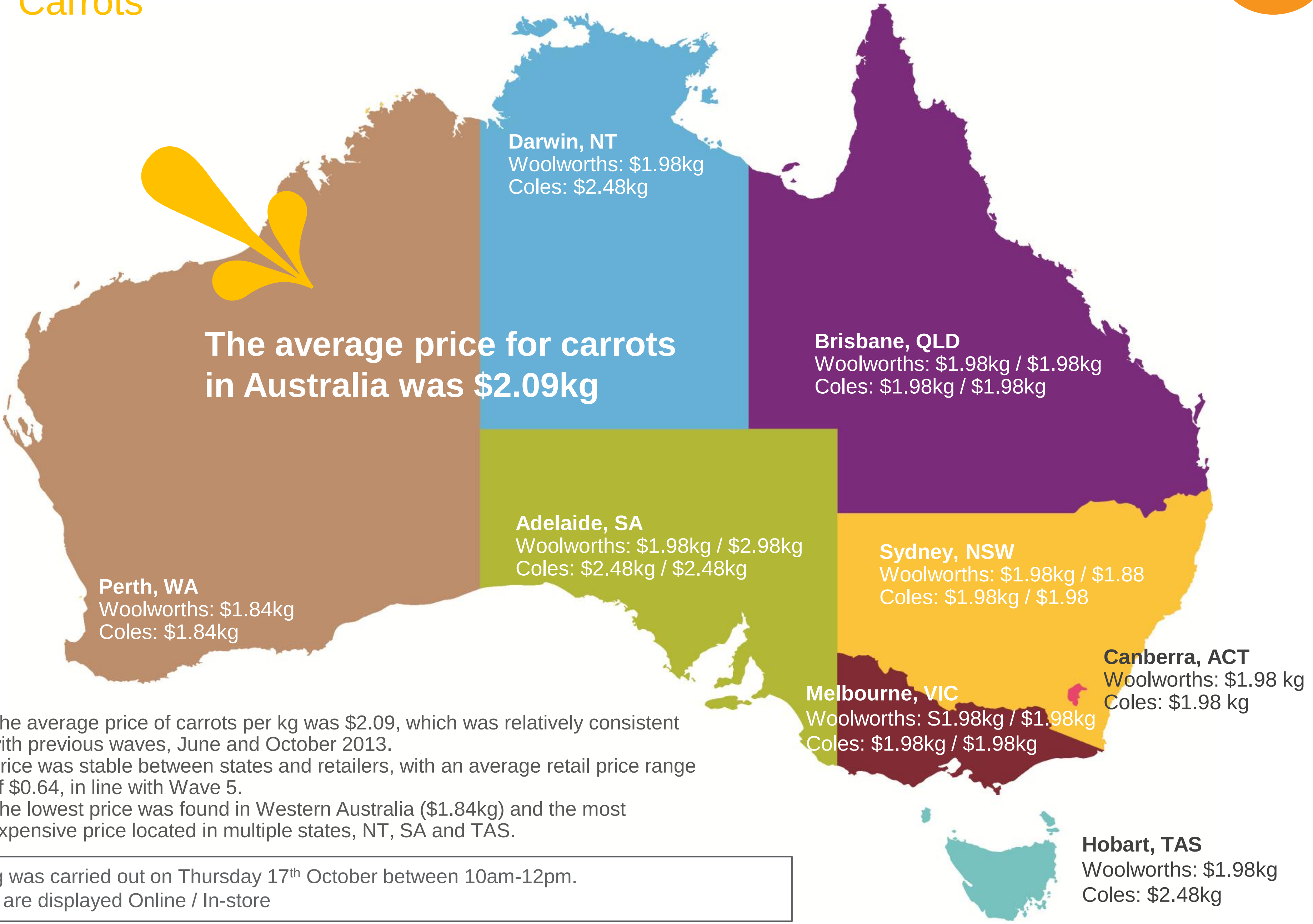


Average number purchased	Small Bag	Individual Carrots	Large Bag
Wave 1: June 2013	1.3	6.1	1.3
Wave 5: October 2013	1.6	6.2	1.7
Wave 9: February 2014	1.8	5.4	1.7

Q3a. How much carrot does this typically equate to?

Online and In-store Commodity Prices

Carrots

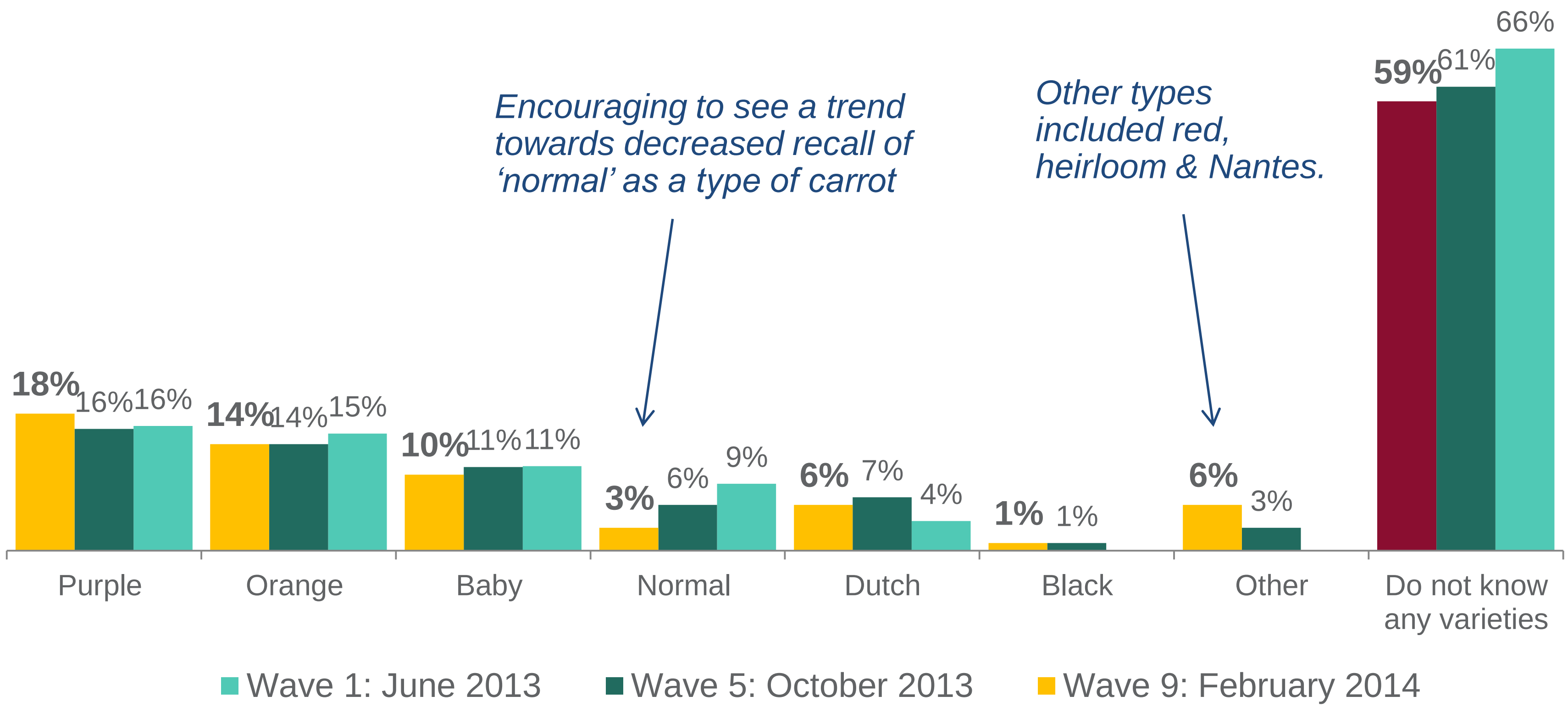


- The average price of carrots per kg was $2.09, which was relatively consistent with previous waves, June and October 2013.
- Price was stable between states and retailers, with an average retail price range of $0.64, in line with Wave 5.
- The lowest price was found in Western Australia ($1.84kg) and the most expensive price located in multiple states, NT, SA and TAS.

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

Spontaneous Varietal Awareness

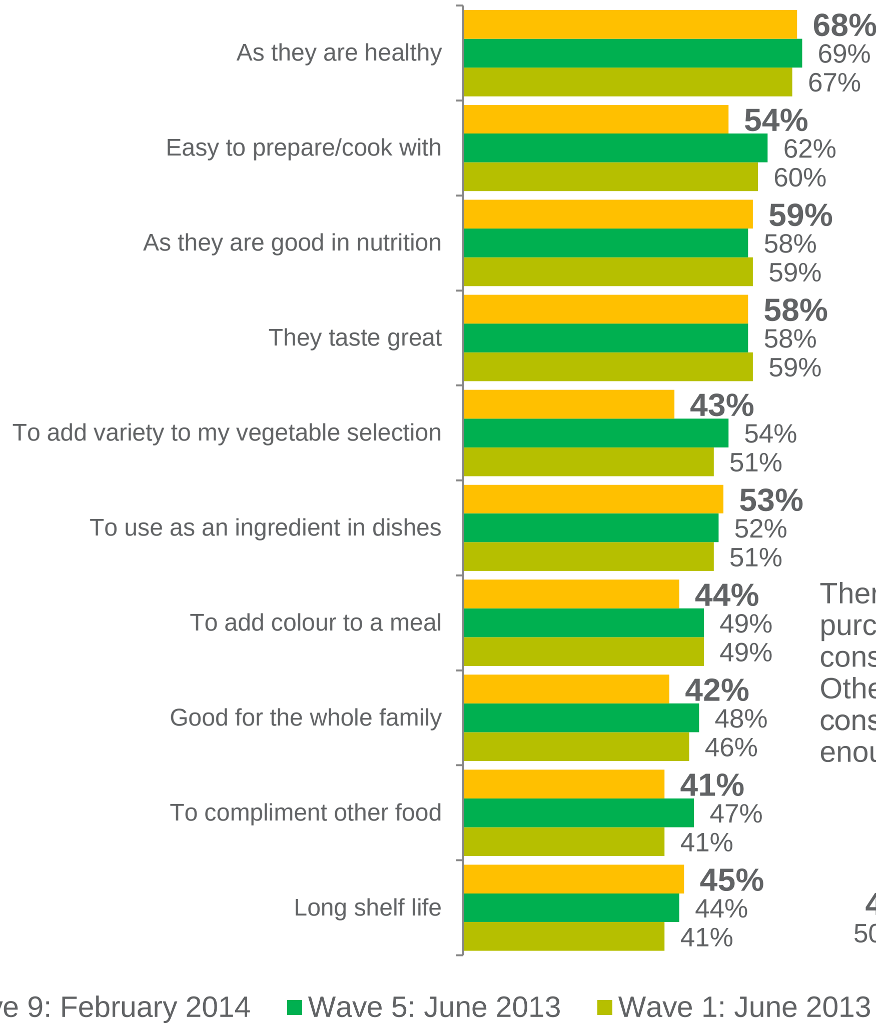
- The majority of respondents remained unable to recall a type of carrot. However, over the three waves there was a trend towards increased recall of a variety of carrot.
- Colour remained a trigger to recall with purple and orange carrots the most common varieties stated.



Q6a. What varieties/types of carrot are you aware of? (unprompted)
Sample Wave 1 N=511 Wave 5 N=520 Wave 9 N=345

Triggers & Barriers to Purchase

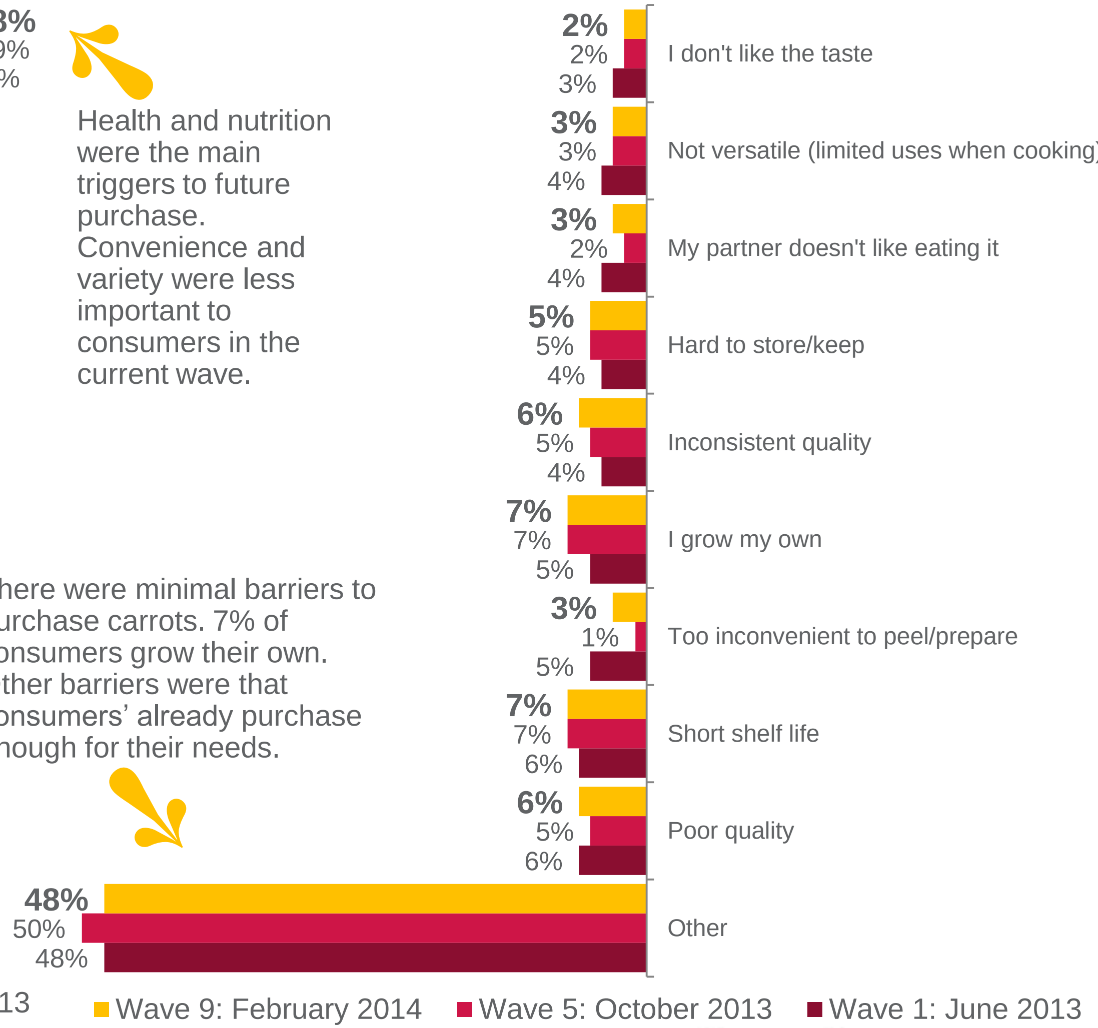
Triggers



Health and nutrition were the main triggers to future purchase. Convenience and variety were less important to consumers in the current wave.

There were minimal barriers to purchase carrots. 7% of consumers grow their own. Other barriers were that consumers' already purchase enough for their needs.

Barriers



Q7. Which of the following reasons best describes why you purchase carrot?
Q8. Which reason best describes why you don't buy carrot more often?
Sample Wave 1 N=511 Wave 5 N=520 Wave 9 N=345

Cooking Cuisine & Occasions

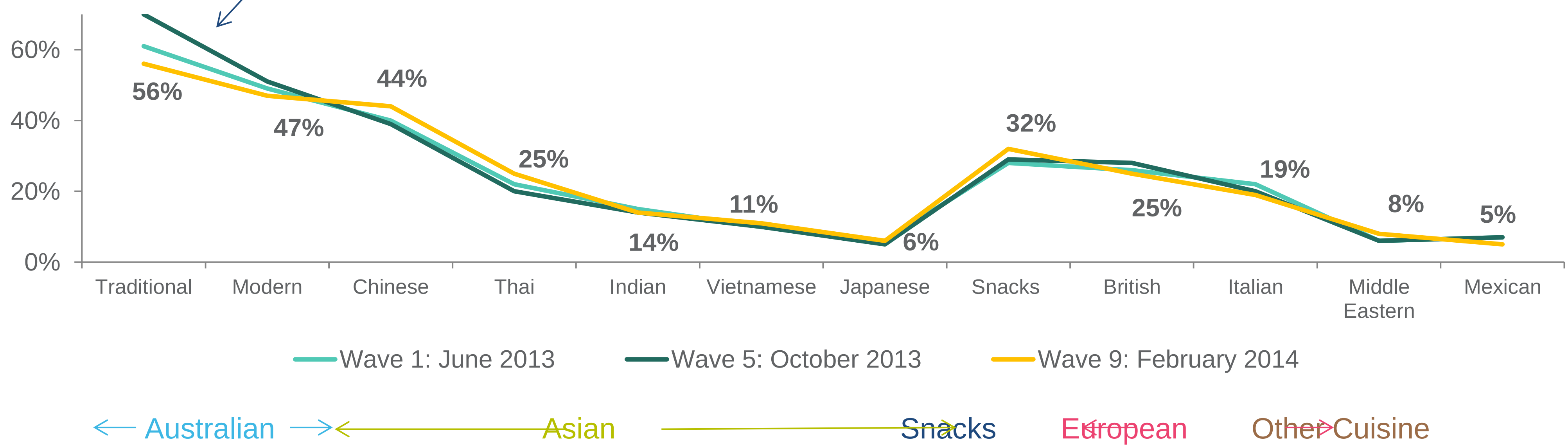
- Overall, cuisine choice was relatively consistent between waves.
- Dinner was the primary consumption occasion. There was an increase in every-day meals compared with Wave 1 and Wave 5.

Wave 9 Top 5 Consumption Occasions

Weekday Dinner	**57%**	▲ Wave 1	▲ Wave 5
Every-day meals	**44%**	▼ Wave 1	▼ Wave 5
Weekend Dinner	**43%**	▲ Wave 1	▲ Wave 5
Family meals	**37%**	▲ Wave 1	▲ Wave 5
Quick meals	**33%**	▼ Wave 1	▼ Wave 5

Decrease in Traditional Australian cuisine cooking, particularly from Wave 5 to Wave 9.

Typical Cuisine Cooked

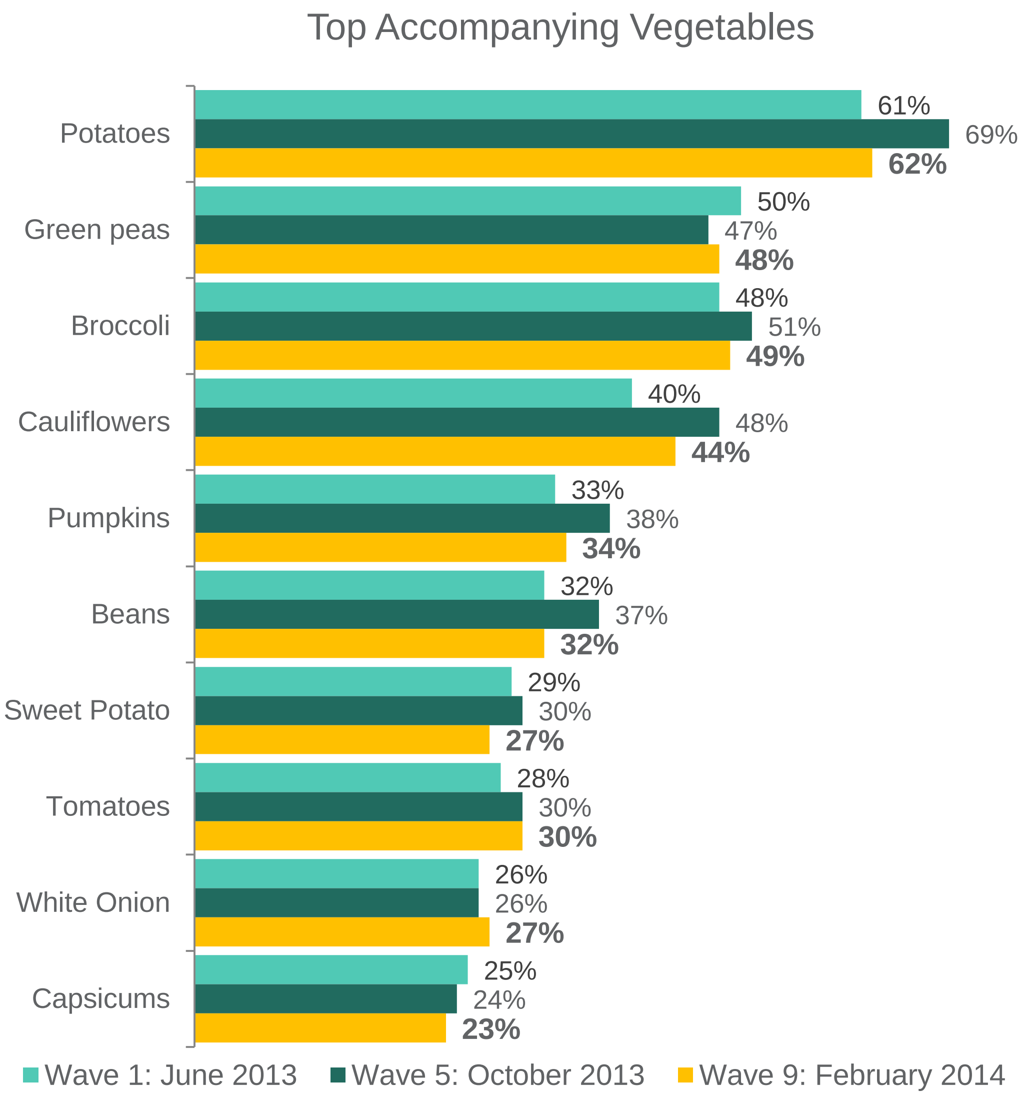


Q10. What cuisines do you cook/consume that use carrot?
Q11. Which of the following occasions do you typically consume/use carrot?
Sample Wave 1 N=511 Wave 5 N=520 Wave 9 N=345
* Indicates significantly higher scores between Waves

colmar brunton.

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

Cooking Preferences



- Carrots were commonly served with potatoes, green peas and broccoli. Accompanying vegetables were on trend with previous waves.
- Steaming and roasting were the primary cooking styles. There was a decrease in boiling as a cooking technique compared with Wave 1 and 5.

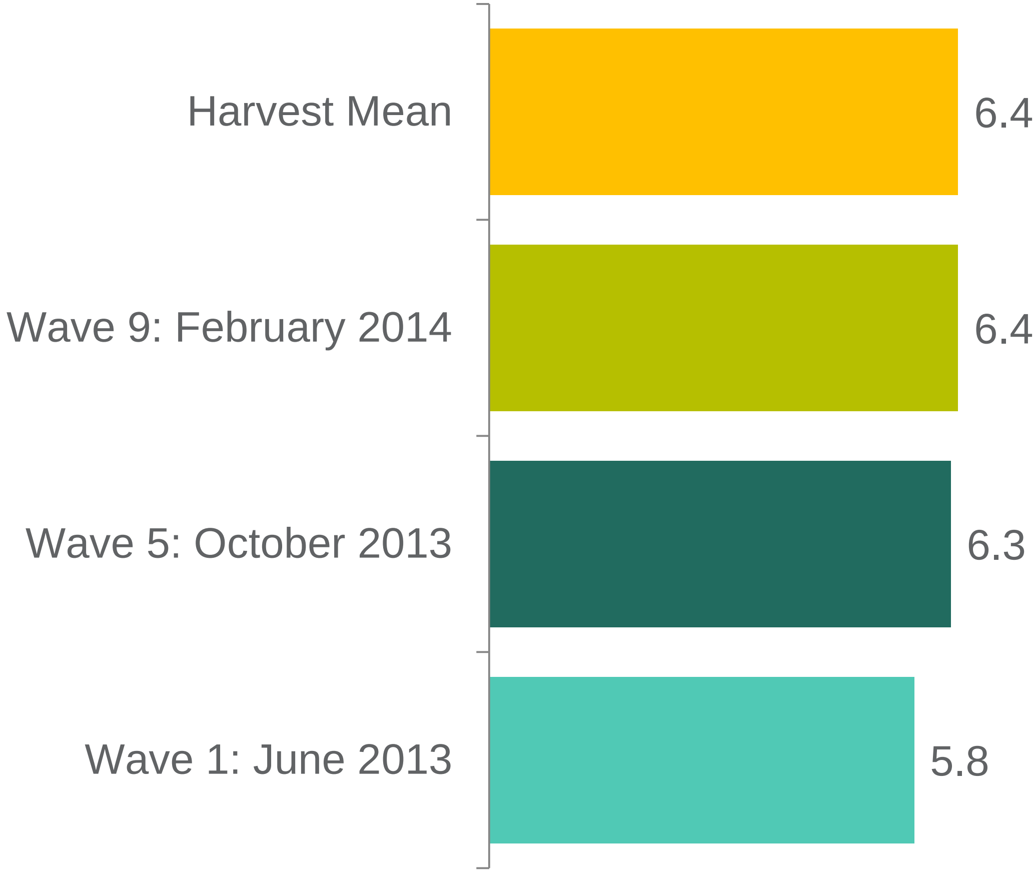
Top 10 Cooking Styles

	Wave 1	Wave 5	Wave 9
Steaming	**50%**	**48%**	**54%**
Boiling	46%	46%	39%
Roasting	**45%**	**48%**	**48%**
Stir frying	44%	47%	46%
Raw	41%	44%	46%
Soup	32%	34%	32%
Baking	28%	27%	23%
Stewing	27%	26%	25%
Microwave	23%	28%	27%
Mashing	7%	11%	13%

Q9. How do you typically cook carrot?
Q10a. And when are you serving carrot which of the following do you also serve together with this?
Sample Wave 1 N=511 Wave 5 N=520 Wave 9 N=345

Importance of Provenance

- Importance of provenance was consistent with Wave 5 and overall Harvest mean. Both the current wave and Wave 5 were significantly higher, and therefore considered more important than Wave 1.



AUSTRALIAN MADE®

Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 1 N=511 Wave 5 N=520 Wave 9 N=345

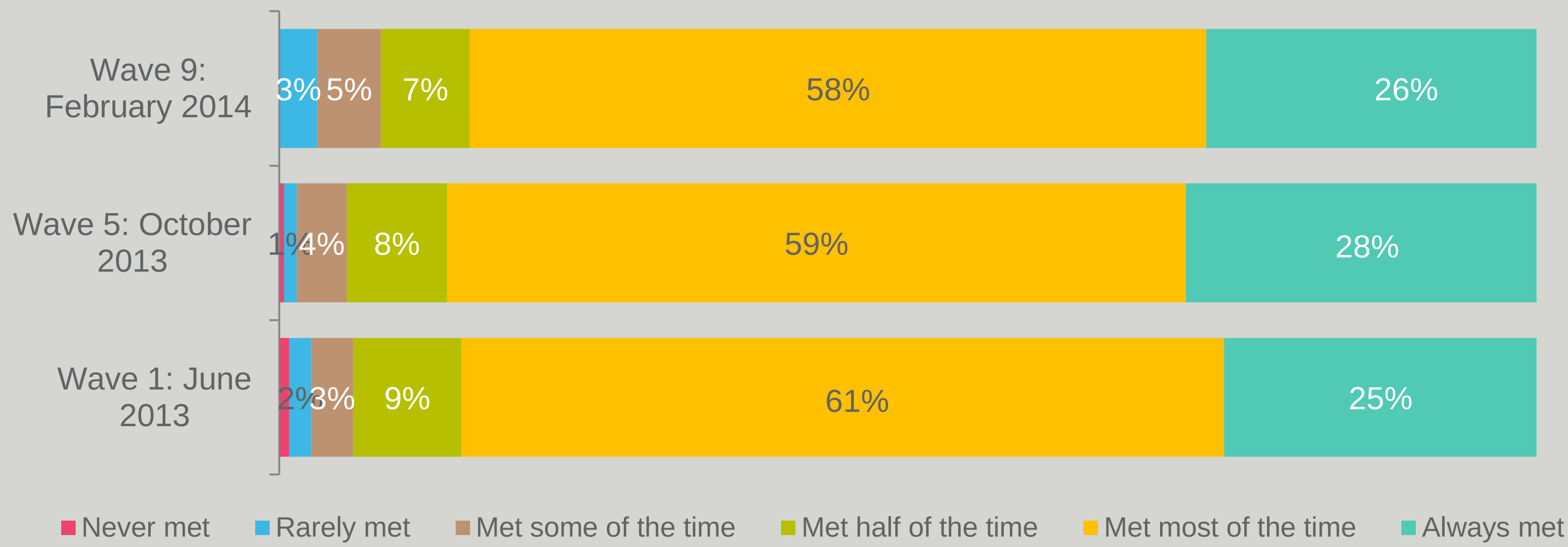
Freshness and Longevity

Expected to stay fresh for **11.9** days

▲ 12.3 days, Wave 1
▲ 12.4 days, Wave 5

- Carrots were expected to stay fresh for 12 days on average, which was on trend with previous waves.
- A quarter of consumers indicated that the freshness was always met, which was relatively high compared with other Harvest commodities.

Expectations Met



Q12. How long do you expect carrots to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy carrots?
Sample Wave 1 N=511 Wave 5 N=520 Wave 9 N=345

Carrot Product Launch Trends.

Carrot Global NPDs

December–February 2013/14

There were 1615 new products launched over the last 3 months that contained carrot as an ingredient.
The majority of these launches occurred in Europe and the Asia Pacific regions.
The top categories launches occurred in meals and sauces.

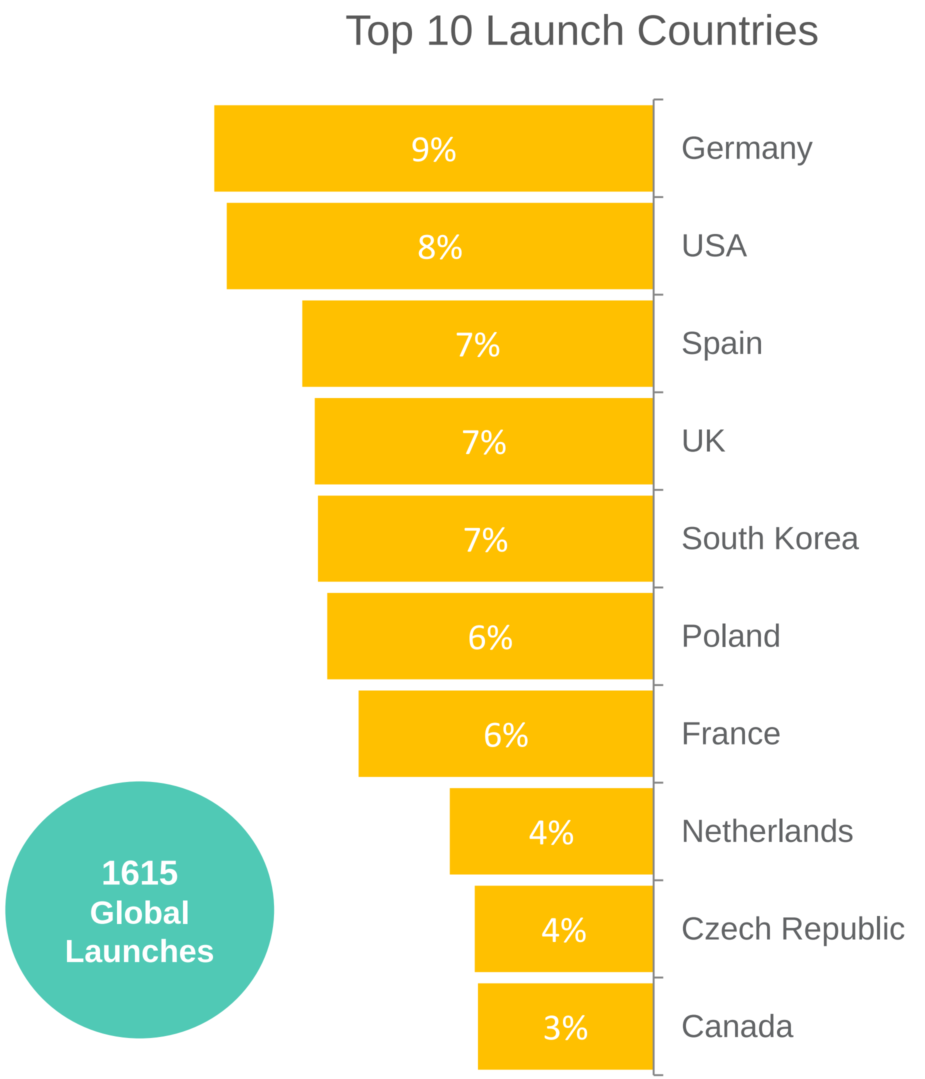
Carrot Product Launches:
Last 3 Months (December–February 2013/14)
Summary

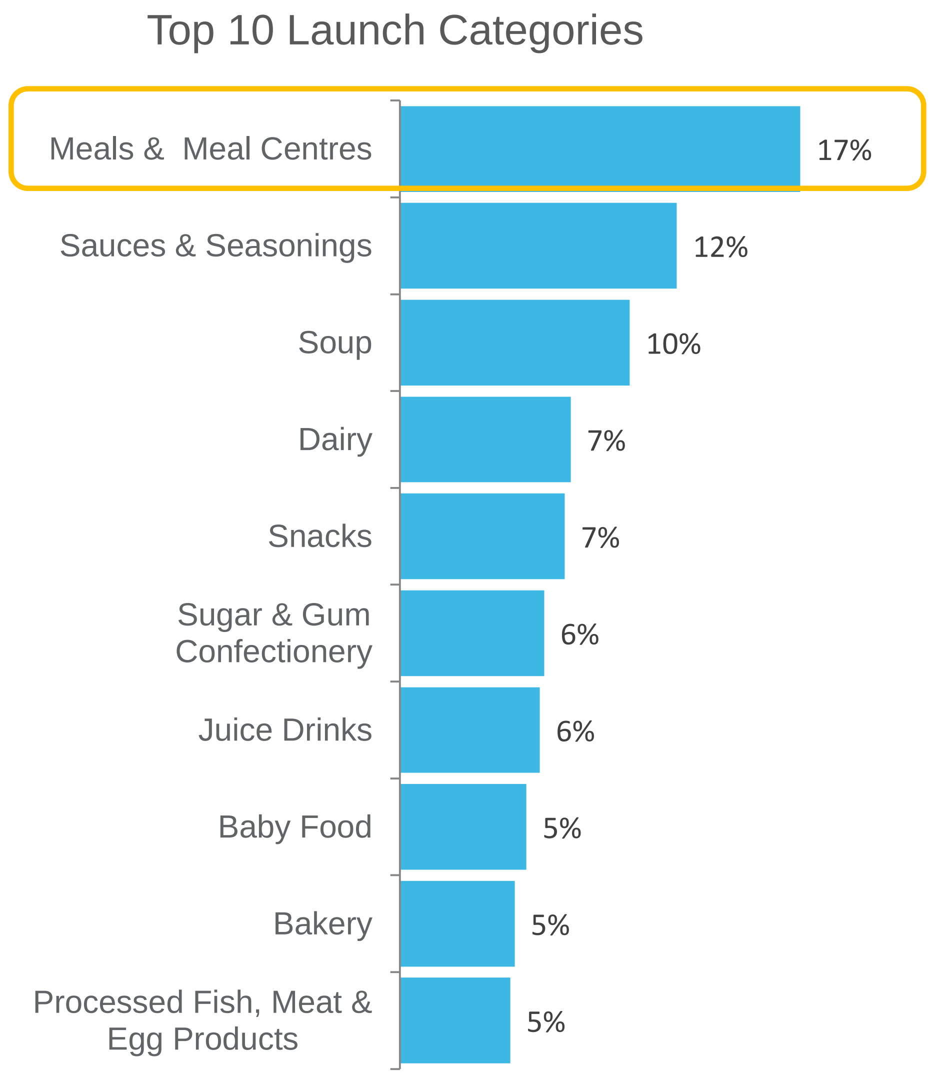
- A total of 1615 products were launched globally in the last 3 months containing carrot as an ingredient. Approximately the same as the previous quarter tracked (1613 launches).
- 20 carrot-containing products were launched in Australia in the last quarter, which was lower than the previous quarter (58 launches). See upcoming slides for examples of Australian launches.
- Europe and the Asia Pacific were the 2 top regions where these products were launched (58% and 23% respectively and on trend with previous quarters).
- Carrot containing products have one of the most diversified pack types being used for their products (for all vegetables tracked) this quarter. The top pack formats were flexible, tubs and trays.
- The top categories for product launches were meals (17%), sauces (12%) and soups (10%); this is on trend with previous quarters.
- The top claims used for launches globally were no additives/preservatives (30%), being microwaveable (21%) and environmentally friendly packaging (17%), also on trend with previous quarters.
- The most innovative launches found were; Carrot Coconut Ginger Soup with Chilli Croutons and Plum Organics Little Crèmes Super Purples Organic Rice Milk Snacks *(contains carrots)*. Examples of these products can be found at the end of the carrot trend report.

Source: Mintel (2014)

Carrot Launches
Country, Region & Categories

- The most active countries for launches in the last 3 months were Germany, USA & Spain.
- The main categories for launches were meals, sauces and soup.

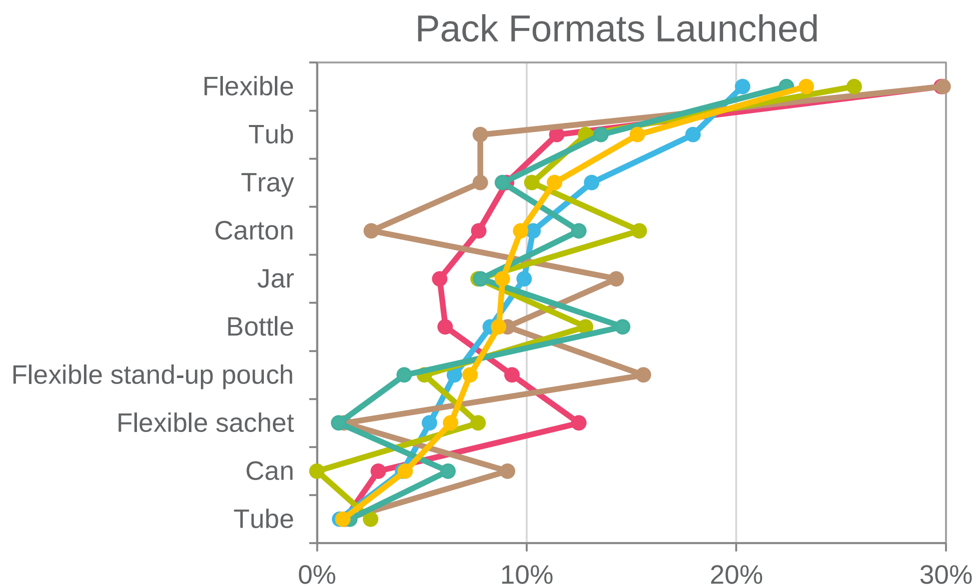


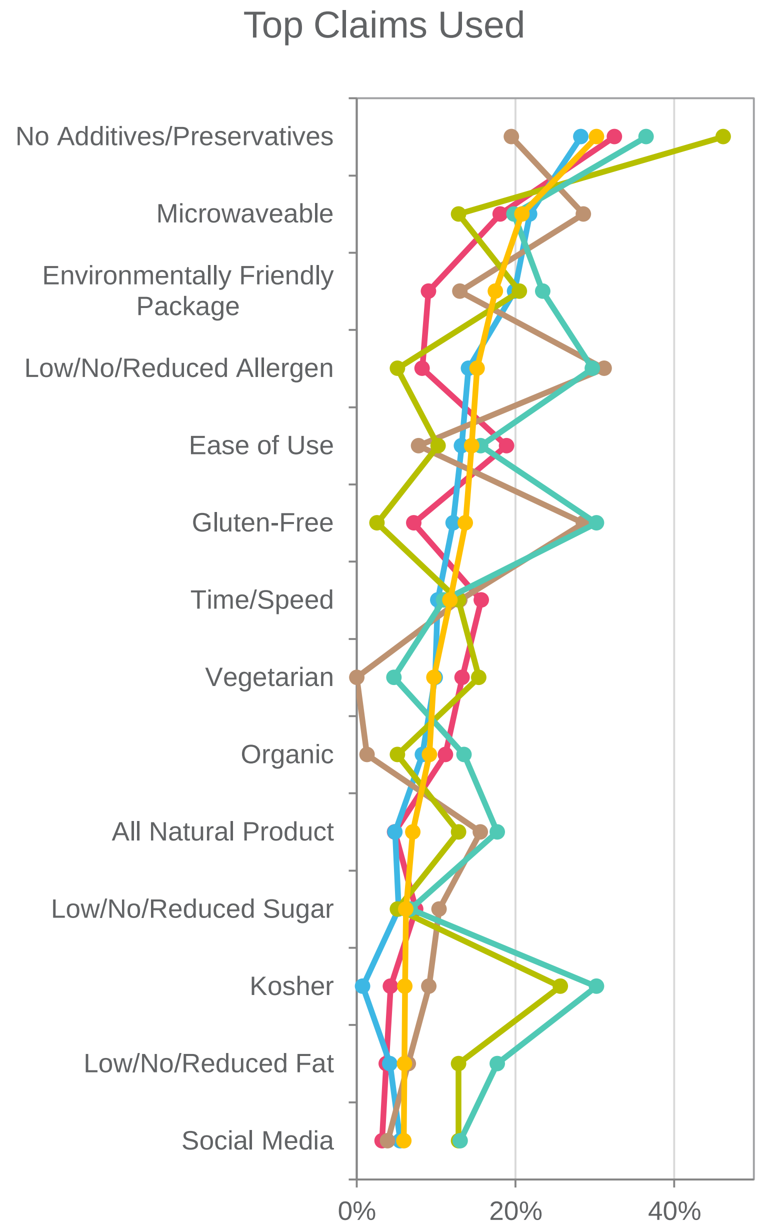


Number of Global Carrot NPD for the L3M N=1615

Carrot Launches
Top Claims & Pack Formats Used

- Top claims for launches globally were no additives/preservatives being microwaveable and using environmentally friendly packaging.
- Globally, the top pack formats used for product launches were flexible packaging followed by tubs.





Middle East & Africa (N=39)
Asia Pacific (N=376)
North America (N=192)
Europe (N=931)
Global (N=1615)
Latin America (N=77)

Number of Global Carrot NPD for the L3M N=1615

Innovative Carrot Launches:
L3M (December–February 2013/14)

Veggie-Go's Carrot Ginger Chewy Fruit and Veggie Snacks (Canada)

This organic snack is free from gluten and GMO, and each pack provides a 1/4 cup of fruit and a 1/4 cup of veggies. The kosher certified product retails in a 12g pack.

Claims:
Organic, Low/No/Reduced Allergen, Kosher, GMO-Free, Gluten-Free

Carrot Coconut Ginger Soup with Chilli Croûtons (Germany)

City Farming Karotte Kokos Ingwer Suppe mit Chilicroutons (Carrot Coconut Ginger Soup with Chilli Croûtons) has been prepared by hand using carefully selected ingredients which include crunchy carrots from German farms, fresh ginger, juicy coconut and a harmonically balanced seasoning which give this mildly creamy soup its exotic flavour.

Claims:
No Additives/Preservatives, Social Media, Vegetarian, Microwaveable

Happy Times Veggie Pals Organic Carrot Orange Apple Chews (Malaysia)

Happy Times Veggie Pals Organic Carrot Orange Apple Chews have been made with organic fruits and veggies. This fun snacking and lunch box ready product is free from preservatives, artificial colours, GMO's, artificial flavouring, peanuts and nuts. It retails in a 100g recyclable pack of five individual pouches that feature the Facebook logo.

Claims:
No Additives/Preservatives, GMO-Free, Ethical - Environmentally Friendly Package, Organic, Social Media, Babies & Toddlers (0-4), Children (5-12).

Plum Organics Little Crèmes Super Purples Organic Rice Milk Snacks (Malaysia)

Plum Organics Little Crèmes Super Purples Organic Rice Milk Snacks are meltable bites of freeze-dried fruit and veggies made with organic rice milk, a creamy non-dairy alternative. The product is made with a blend of acai, blackberry and purple carrot and contains vitamin A, for healthy bones and growing bodies, and vitamin C.

Claims:
No Additives/Preservatives, All Natural Product, Low/No/Reduced Allergen, GMO-Free, Convenient Packaging, Other (Functional), Immune System (Functional), Organic, Social Media, Babies & Toddlers (0-4), Bone Health.

Source: Mintel (2014)

Innovative Carrot Launches:
L3M (December–February 2013/14)

Albi Carrot Nectar (Russia)

Albi Nektar Morkovnyy (Carrot Nectar) is now available. The product has a 40% juice content and retails in a 0,5L pack.

Claims:
Carrot Juice, Carrot Puree (Puree, Pure), Waters, White Sugar, Glucose Fructose Syrup

Naebro Carrot Stick Snack (South Korea)

Naebro Carrot Stick Snack is claimed to be a Korean snack for babies aged over six months. This product is made with 97% pesticide-free brown rice and 1.47% carrot powder. According to the manufacturer, they are trying to provide the live nutrients with the cleanliness of nature. It retails in a 40g resealable pack.

Claims:
Convenient Packaging, Babies & Toddlers (0-4), Ethical - Environmentally Friendly Product, No Additives/Preservatives

Humana Organic Carrots Puree (Poland)

Humana Marchewka Puree (Organic Carrot Puree) is designed for babies over four months old. It is said to be made only from selected ingredients coming from organic crops and is free from added sugar, milk protein, gluten, flavour, colourants, preservatives, thickeners, harmful substances and with a low content of sodium. The product retails in a 125g pack.

Claims:
No Additives/Preservatives, Low/No/Reduced Allergen, Brain & Nervous System (Functional), Organic, Low/No/Reduced Sugar, Gluten-Free, Low/No/Reduced Sodium, Babies & Toddlers (0-4)

SheaMoisture Kids Coconut & Hibiscus Curling Butter Cream is (USA)

SheaMoisture Kids Coconut & Hibiscus Curling Butter Cream is a non-greasy butter cream designed to define whilst taming frizz and flyway hair for smooth, bouncy curls. It is said to keep children's thick tresses looking shapely and resilient with a soft, shiny hold.

Claims:
No Additives/Preservatives, Sulphate/Sulfate Free, Paraben Free, Brightening / Illuminating*, Organic, Botanical/Herbal, Ethical - Environmentally Friendly Product, Ethical - Animal, Ethical - Human, Gluten-Free, Children (5-12), Moisturising / Hydrating, Mineral Oil/Petroleum Free

Source: Mintel (2014)

Innovative Carrot Launches:
L3M (December–February 2013/14)

Saito Yokote Yakisoba Fried Noodle & Kiritanpo Rice Stick Set (Hong Kong)

Saito Yokote Yakisoba Fried Noodle & Kiritanpo Rice Stick Set is now available. This product retails in a 645g pack enough for three servings.

Claims:
None available.

Mango, Carrot & Orange Baby Purée (Netherlands)

100% biological purée with pure fruit and vegetables, and contains no artificial additives or added sugar. This organic product is free from chemical fertilisers, and is claimed to respect humans and animals.

Claims:
No Additives/Preservatives, All Natural Product, Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Low/No/Reduced Sugar, Ease of Use, Organic, Babies & Toddlers (0-4), Children (5-12)

Bia Organic Multifruit Purée (Spain)

Bia Alimento Infantil Ecológico Multifrutas (Organic Multifruit Purée) has been made with 100% fresh fruit for babies from four months of age. This organic purée is rich in vitamin C, and is free from food bits, added sugars, preservatives, colourants, additives, eggs, lactose and gluten. The product retails in a 200g pack that features the Facebook link.

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

Source: Mintel (2014)

Top Australian Carrot Launches:
L3M (December 2013- February 2014)

Moroccan Argan Oil Luxurious Treatment Kit

Tasty Brand Organic Fruit Snacks

Woolworths Gold Turkey & Cranberry Pâté

You. Sips Bits Dips Celery, Carrot & Sundried Tomatoes

Sirena Puttanesca Style Tuna & Rice

Woolworths Select Once Upon A Time Vegetable Pasta Bake

Noah's Creative Juices Orange, Apple, Guava Smoothie Banana

Ainsley Harriott World Kitchen Creamy Vegetable Spelt

Pacific West Japanese Gyoza

Rhythm Superfoods Zesty Nacho Kale Chips

Celebrate Health BBQ Sauce

Woolworths Gold Heavenly Strawberries & Cream Cookies

Source: Mintel (2014)

Cauliflower.

Purchase and Consumption Behaviour

Average Purchase **3.0** times per month

▼ 2.9 times, Wave 1
▲ 3.2 times, Wave 5

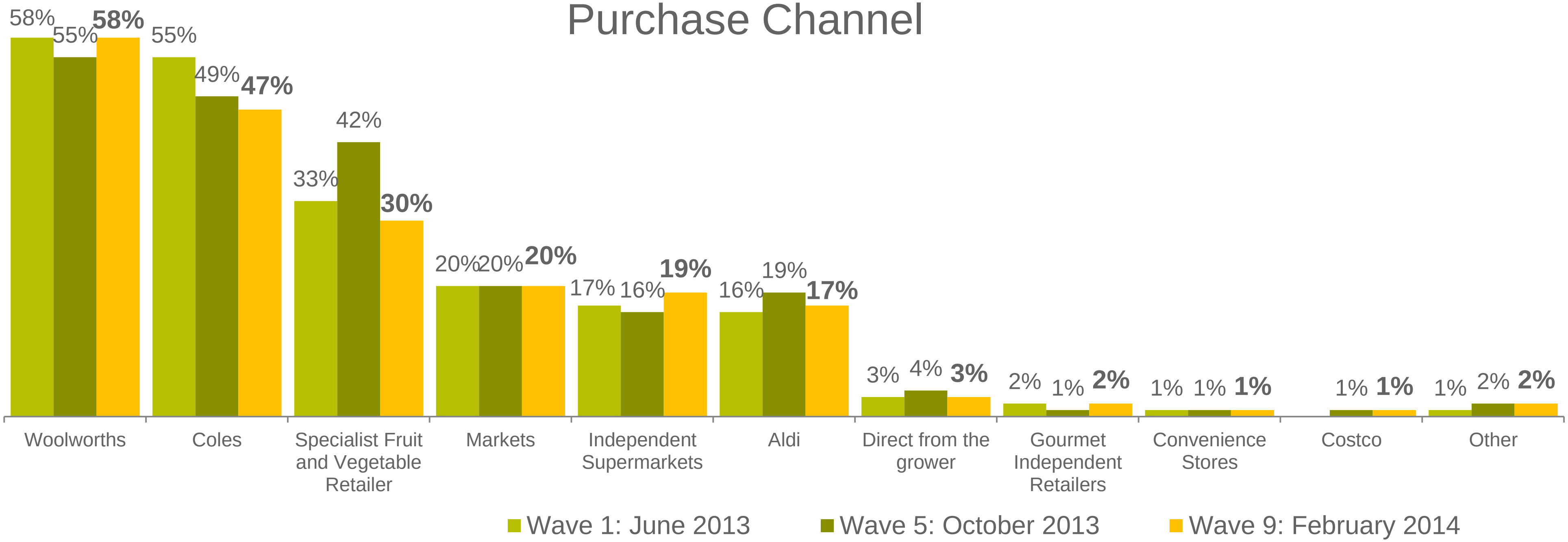
Average Consumption **7.8** times per month

▼ 7.3 times, Wave 1
▲ 8.5 times, Wave 5

⇛ Consumption and purchase frequency of cauliflower was stable. Fluctuations in frequency are likely due to seasonality with Wave 1 coming into season, Wave 5 was peak season and current wave was out of season.

⇛ Mainstream retailers remained the most common purchase channel for cauliflower. There was a decrease in purchase from specialist retailers.

Purchase Channel



Q1. On average, how often do you purchase cauliflower?
Q2. On average, how often do you consume cauliflower?
Q5. From which of the following channels do you typically purchase cauliflower?
Sample Wave 1 N=508 Wave 5 N=448 Wave 9 N=316
* Indicates significantly higher scores between Waves

colmar brunton.

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

Average Spend & Price Sensitivity

Average weight of purchase

The typical consumer purchased **1.0kg** of cauliflower.

Consumers consistently perceive that a whole cauliflower weighs 1.0kg, the most common format purchased.

— 1.0kg, Wave 1
— 1.0kg, Wave 5

Recalled last spend

Recalled last spend on cauliflower was **$3.20.** This was in line with Waves 1 and 5.

▼ $3.00, Wave 1
▼ $2.90, Wave 5

Value for money

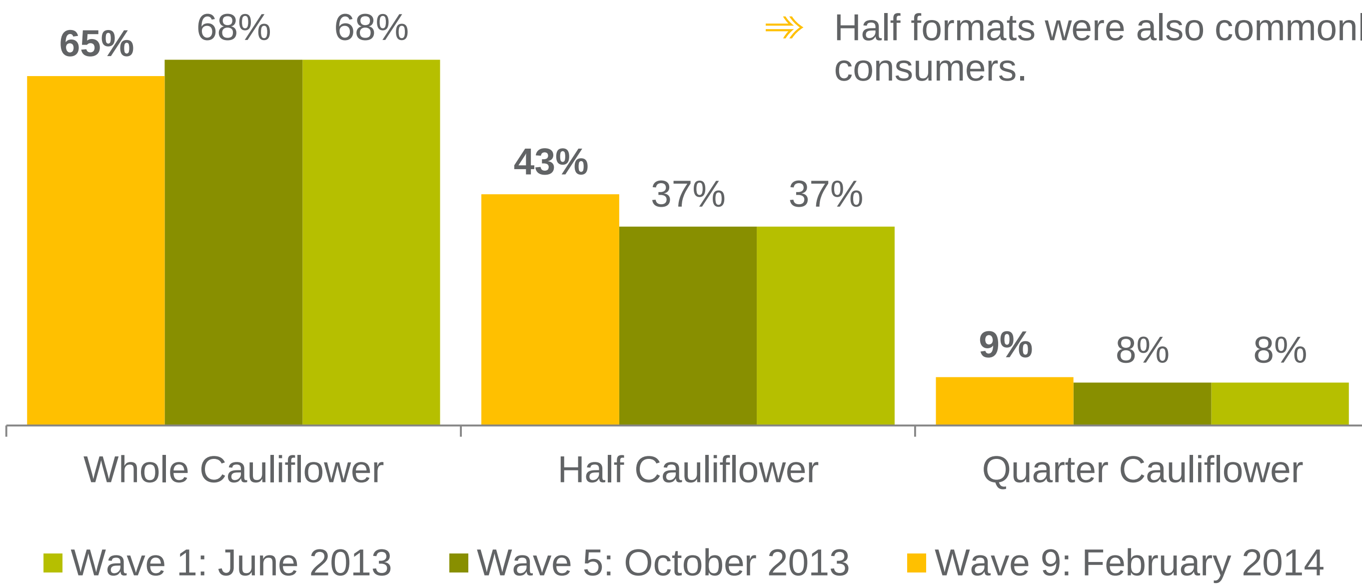
Consumers' perceived value for money was fair **(6.1/10).** This was slightly lower than previous waves.

▼ 6.3/10, Wave 1
▼ 6.4/10, Wave 5

Q3. How much cauliflower 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 1 N=508 Wave 5 N=448 Wave 9 N=316

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

Pack Formats Purchased



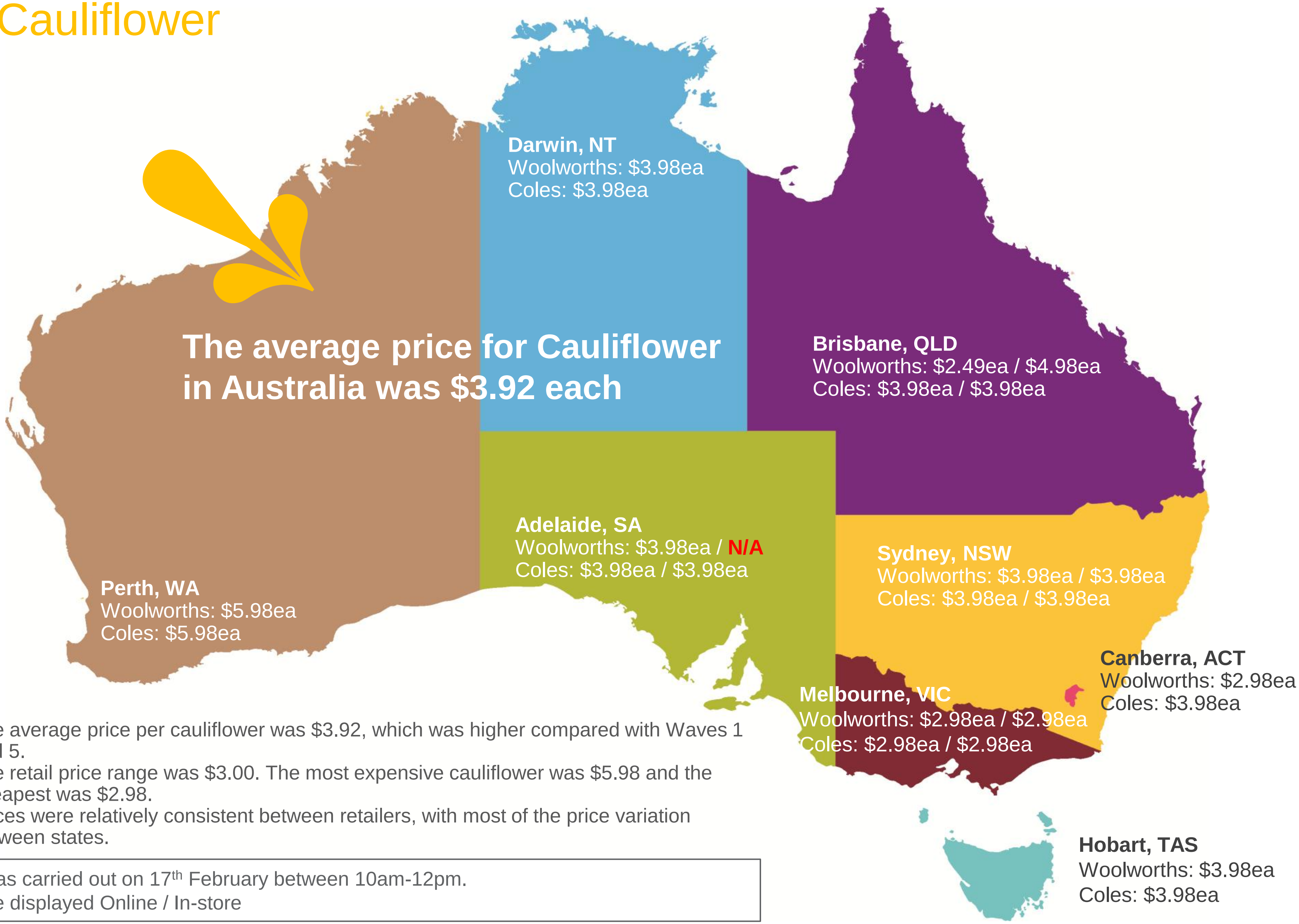
- Whole cauliflower remained the most common format purchased, typically one per shop.
- Half formats were also commonly purchased by consumers.

Average number purchased	Whole	Half	Quarter
Wave 1: June 2013	1.1	1.1	1.6
Wave 5: October 2013	1.2	1.2	1.8
Wave 9: February 2014	1.2	1.2	2.2

Q3a. How much cauliflower does this typically equate to?

Online and In-store Commodity Prices

Cauliflower

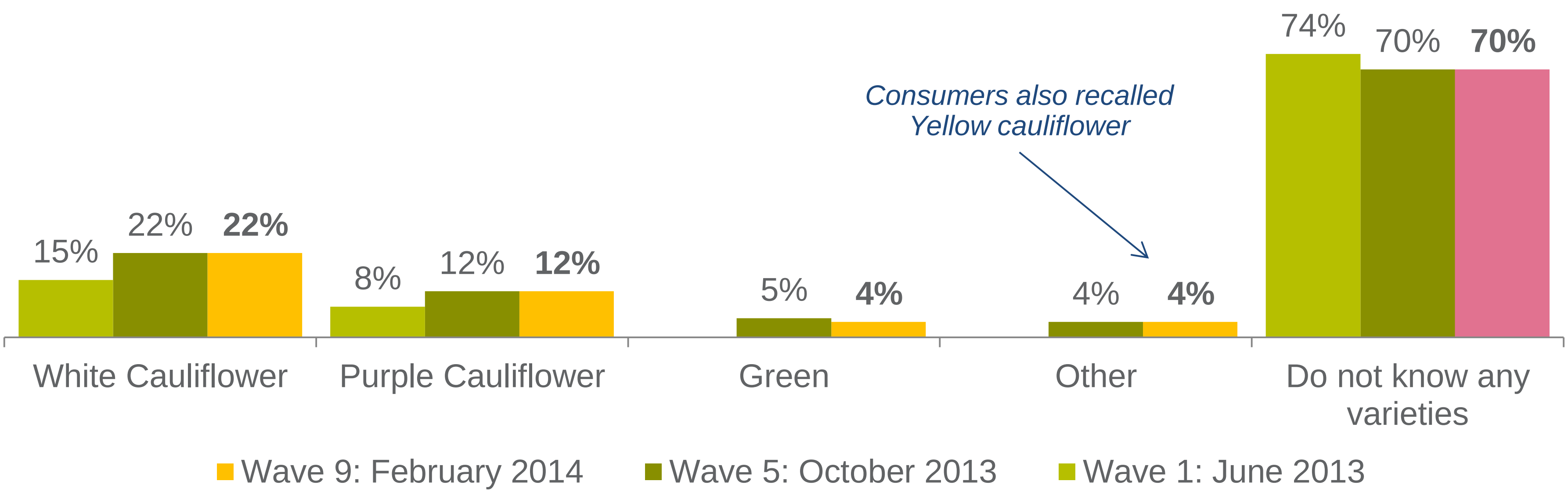


- The average price per cauliflower was $3.92, which was higher compared with Waves 1 and 5.
- The retail price range was $3.00. The most expensive cauliflower was $5.98 and the cheapest was $2.98.
- Prices were relatively consistent between retailers, with most of the price variation between states.

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

Spontaneous Varietal Awareness

- Recall of cauliflower types remained very low, which reflected levels of awareness in Waves 1 and 5.
- Colour was used for cauliflower variety recall, with white and purple the most commonly recalled types. Overall recall of cauliflower types were consistent with Wave 5, both of which were higher than Wave 1.

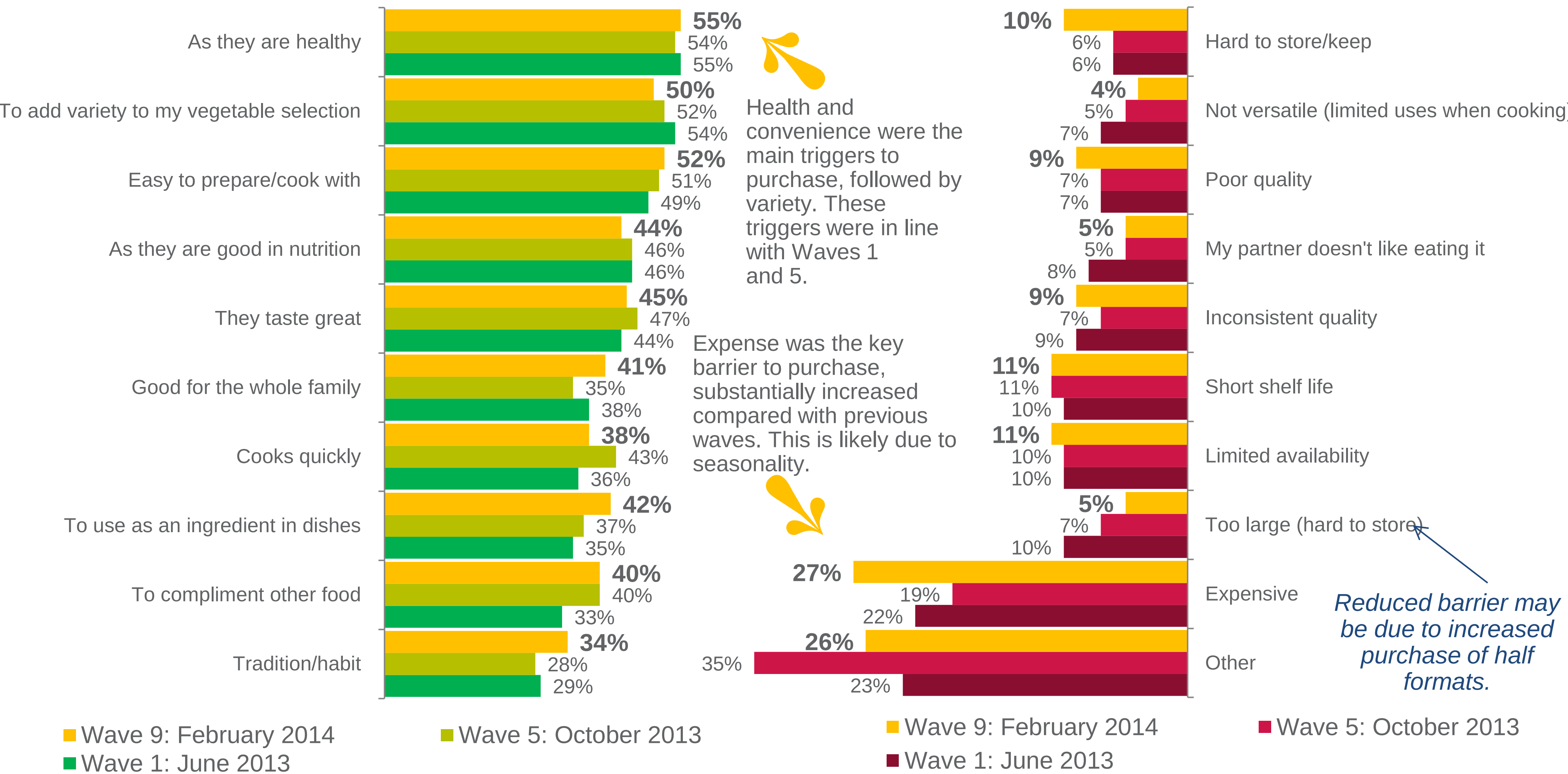


Q6a. What varieties of cauliflower are you aware of? (unprompted)
Sample Wave 1 N=508 Wave 5 N=448 Wave 9 N=316

Triggers & Barriers to Purchase

Triggers

Barriers



Q7. Which of the following reasons best describes why you purchase cauliflower?
Q8. Which reason best describes why you don't buy cauliflower more often?
Sample Wave 1 N=508 Wave 5 N=448 Wave 9 N=316

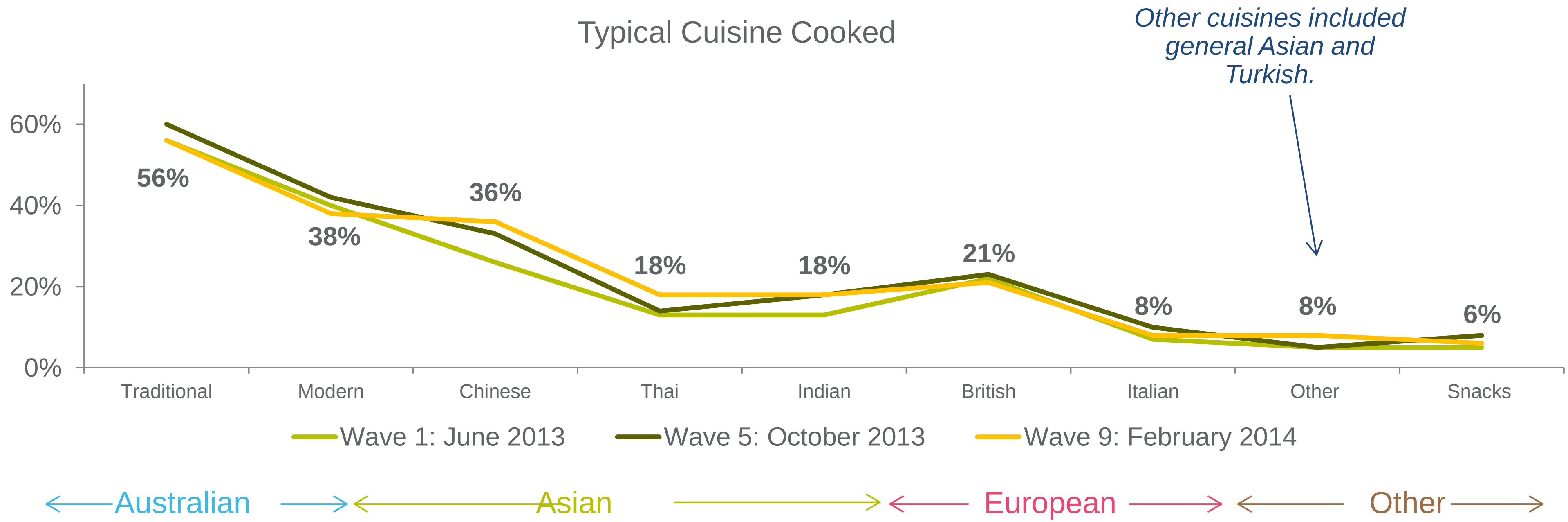
Cooking Cuisine and Occasions

- Traditional Australian cuisine remained the most common type cooked.
- There was a trend towards increased Chinese and Thai cooking across the three waves.
- Dinner, both weekday and weekend were the primary consumption occasions for cauliflower.

Wave 9 Top 5 Consumption Occasions

Weekday dinner	60%	▼ Wave 1	▲ Wave 5
Weekend dinner	40%	▲ Wave 1	▲ Wave 5
Family meals	36%	— Wave 1	— Wave 5
Every-day meals	27%	▲ Wave 1	▲ Wave 5
Quick meals	21%	▼ Wave 1	▼ Wave 5

Typical Cuisine Cooked

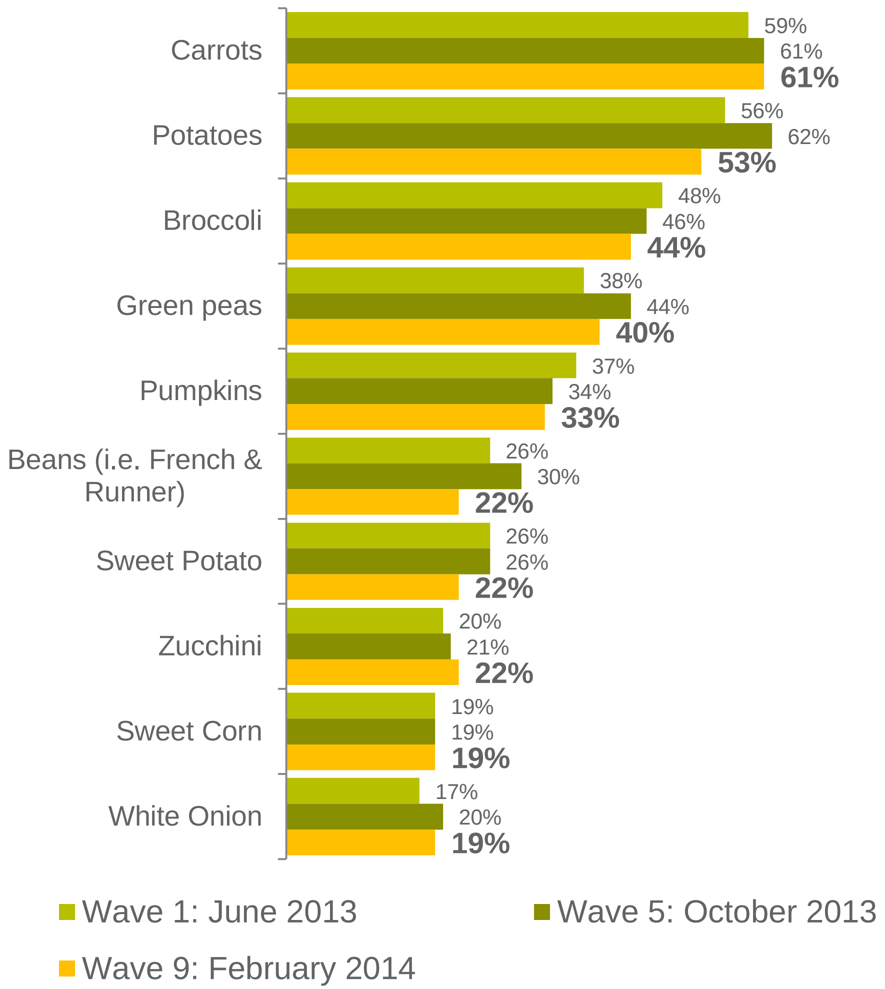


Q10. What cuisines do you cook/consume that use cauliflower?
Q11. Which of the following occasions do you typically consume/use cauliflower?
Sample Wave 1 N=508 Wave 5 N=448 Wave 9 N=316

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

Cooking Preference

Top 10 Accompanying Vegetables



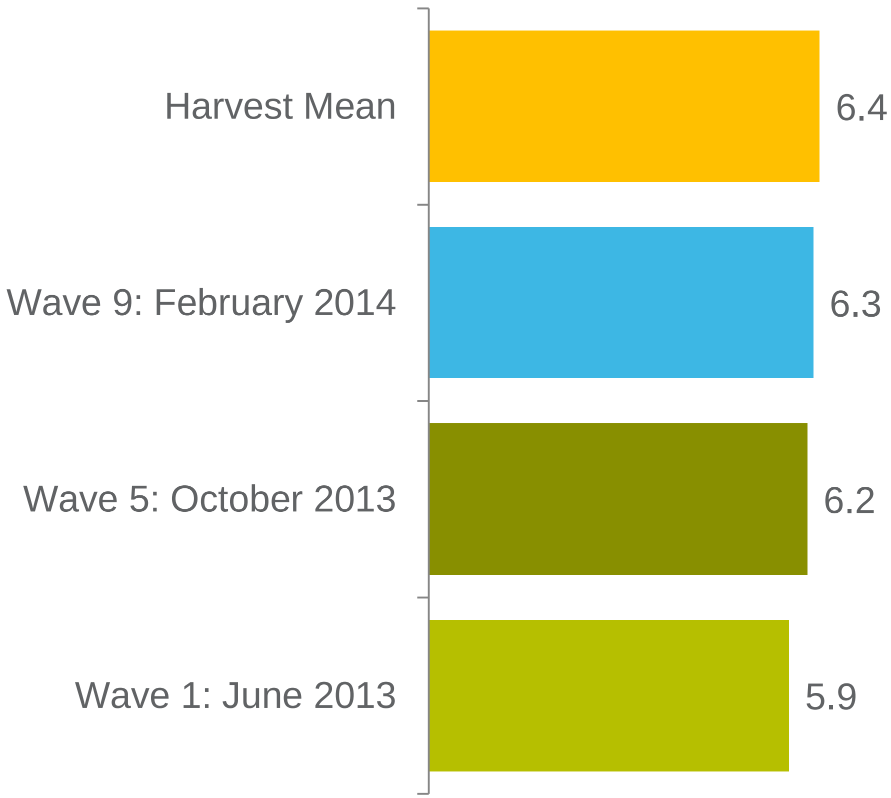
- Cauliflower was typically accompanied by carrots, potatoes and broccoli, which was on trend with previous waves.
- Consumers repertoire of cooking techniques were steaming, boiling and stir-frying.

Top 10 Cooking Styles			
	Wave 1	Wave 5	Wave 9
Steaming	**56%**	**55%**	**55%**
Boiling	**41%**	**43%**	**40%**
Stir frying	**31%**	**36%**	**42%**
Soup	25%	21%	21%
Microwave	24%	28%	28%
Baking	14%	17%	15%
Stewing	11%	10%	11%
Roasting	10%	7%	9%
Raw	9%	10%	11%
Blanche	6%	6%	6%

Q9. How do you typically cook cauliflower?
Q10a. And when are you serving cauliflower which of the following do you also serve together with this?
Sample Wave 1 N=508 Wave 5 N=448 Wave 9 N=316

Importance of Provenance

- Trend towards increased importance of provenance over the three waves. Current perceived importance of cauliflower provenance was consistent with overall Harvest mean.



Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 1 N=508 Wave 5 N=448 Wave 9 N=316

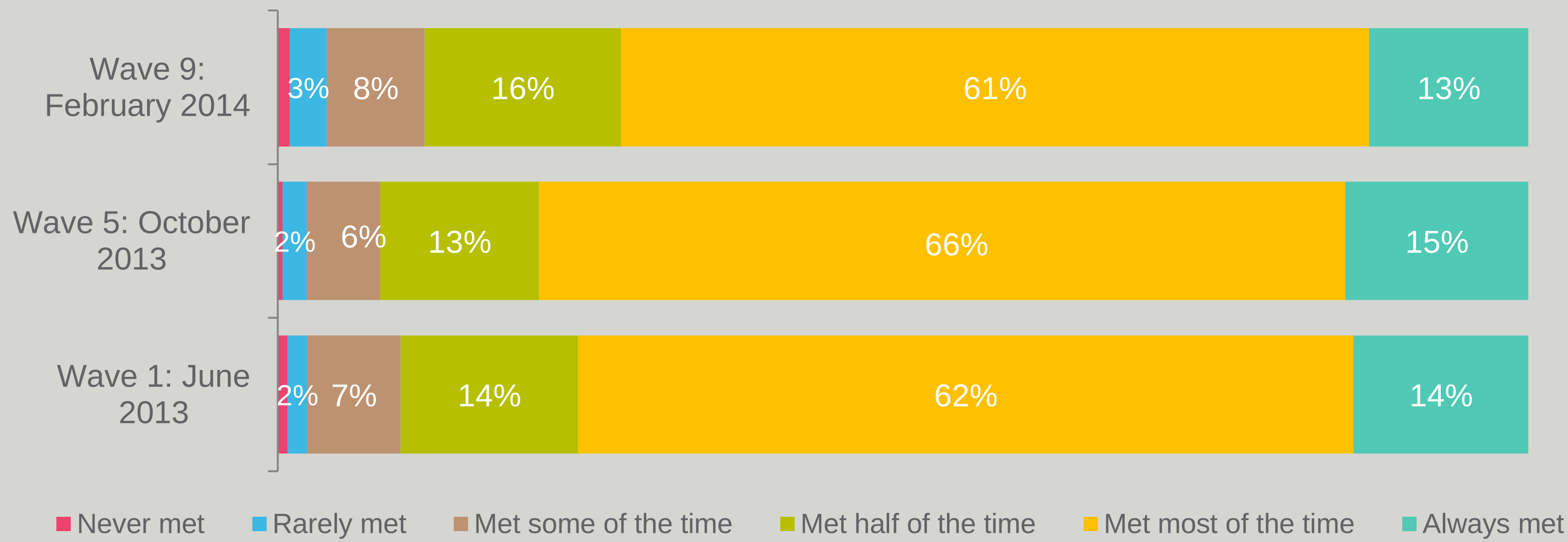
Freshness and Longevity

Expected to stay fresh for **8.5** days

▲ 8.6 days, Wave 1
▲ 8.6 days, Wave 5

- Cauliflower was expected to stay fresh for over a week, which was consistent with consumer's perceptions across waves.
- Expectations were met at least most of the time on 74% of occasions, this was somewhat less than previous waves.

Expectations Met



Q12. How long do you expect cauliflower to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy cauliflower?
Sample Wave 1 N=508 Wave 5 N=448 Wave 9 N=316

colmar brunton.

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

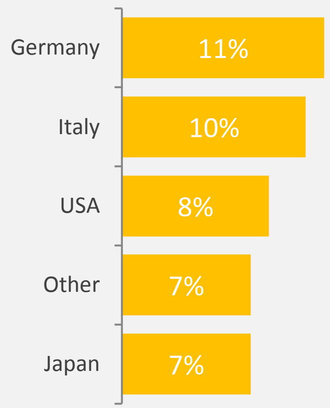
Cauliflower Product Launch Trends.

Cauliflower Global NPDs

December–February 2013/14

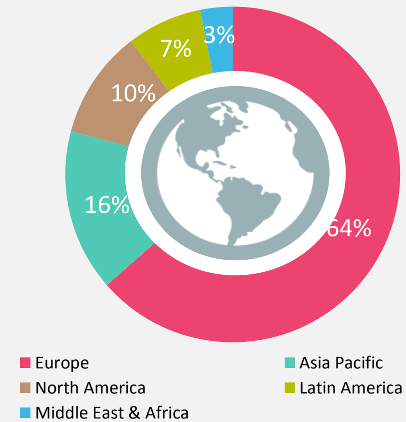
There were 96 new products launched globally over the last 3 months that contained cauliflower as an ingredient. The majority of launches were in Europe.
Launches were mainly in the fruit and vegetable category.
Development centred around microwaveable products and the “no-added” claim. These trends are consistent with previous waves of cauliflower.

Country

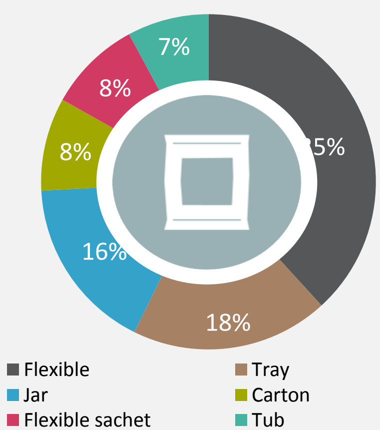


96 Global NPDs

Region



Top Pack Formats



Categories

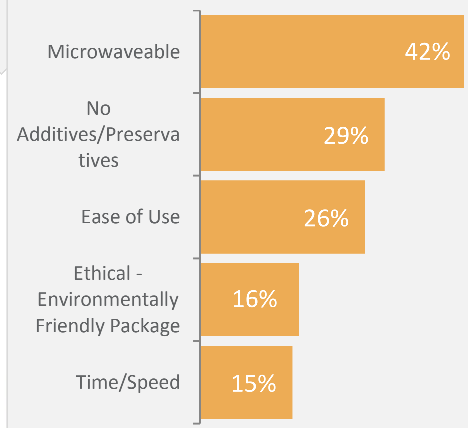
Fruit & Vegetables 40%

Sauces & Seasonings 16%

Meals & Meal Centres 15%

Soup 11%

Top Claims



Cauliflower Product Launches:
Last 3 Months (December 2013-February 2014)
Summary

- A total of 96 products containing cauliflower as an ingredient were launched globally in the last 3 months, which was on par with the previous quarter (92 launches).
- There were 2 cauliflower products launched in Australia in the last 2 months (Coles Sweet Mustard Pickles & Sirena Puttanesca Style Tuna & Rice).
- The majority of the products that were launched were in Europe (64%), followed by Asia Pacific (16%) – consistent with previous quarter. Germany had the most launches containing cauliflower (11%).
- Flexible (35%), tray (18%) and jar (16%) packaging were the top 3 pack formats for cauliflower products in the last quarter, this is on trend with previous waves.
- The top categories for launches were fruit and vegetables (40%), sauces and seasonings (16%) and meals (15%), the same categories as the previous quarter.
- Microwaveable and “no-added” claims were highest in the last 3 months, with 42% and 29% respectively. These have been consistent with all previous waves tracked for cauliflower products.
- There was little innovation in the cauliflower products launched this quarter. Bags of florets, dressings (sauces) and soups were the most common products launches (see following slides for examples of product launches).

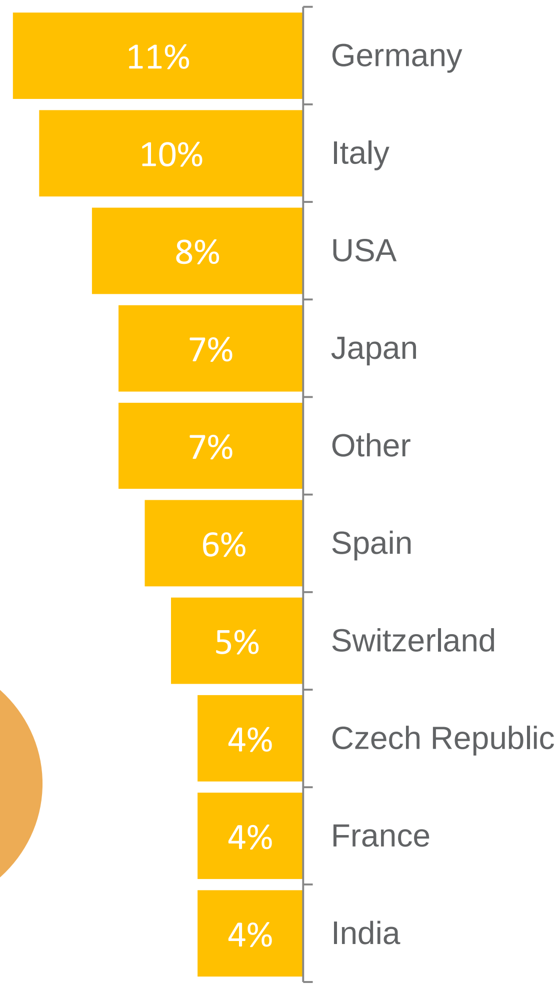
Source: Mintel (2014)

Cauliflower SKUs

Country, Region & Categories

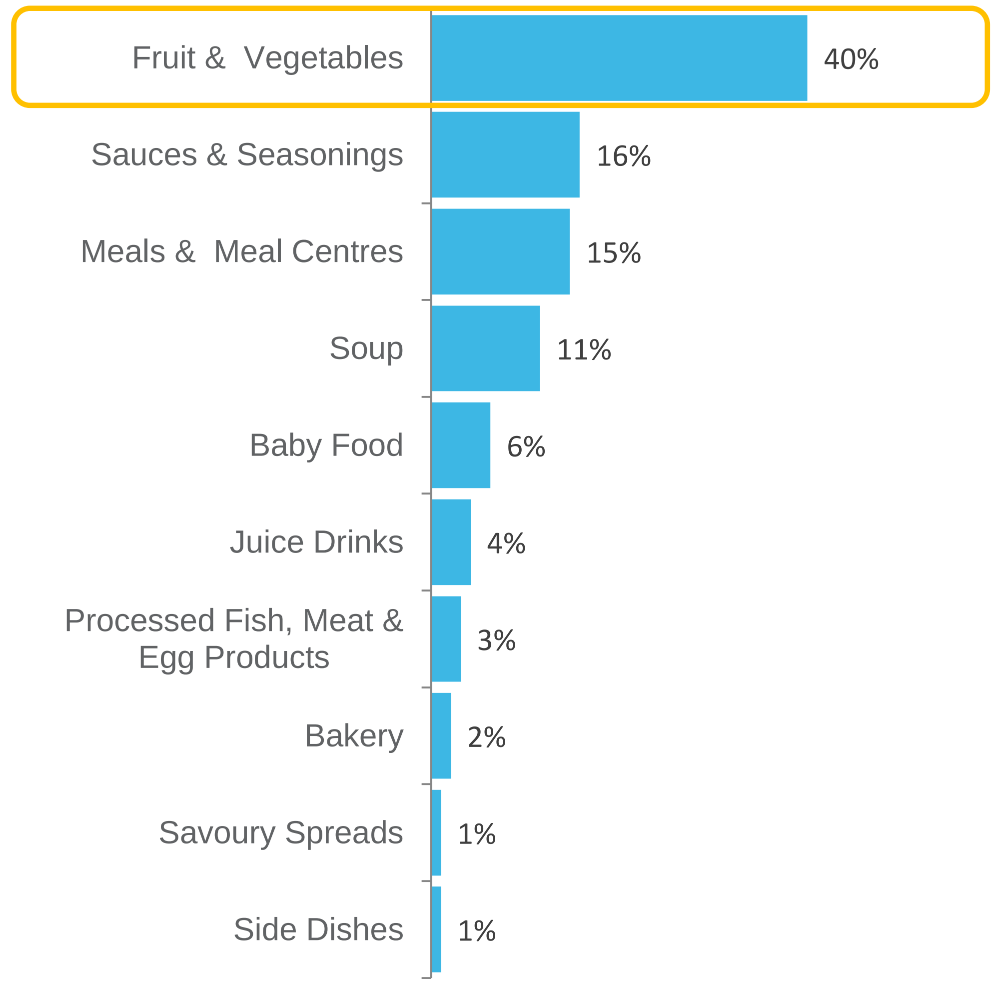
- The most active countries for cauliflower launches were Germany and Italy.
- The top categories for launches were fruit and vegetables, sauces/seasonings and meals. These top 3 launches are consistent with previous cauliflower launch trends.

Top Launch Countries



96 Global Launches

Top Launch Categories



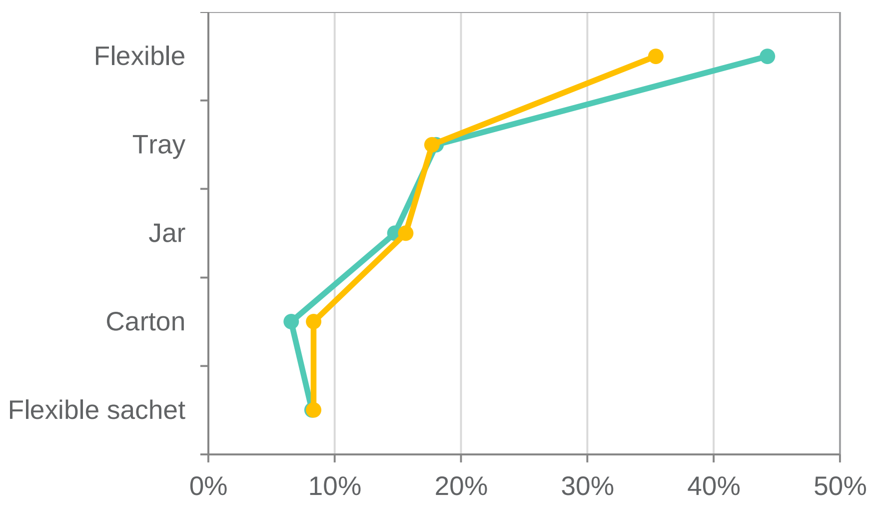
Number of Global Cauliflower NPDs for the L3M N=96

Cauliflower Launches

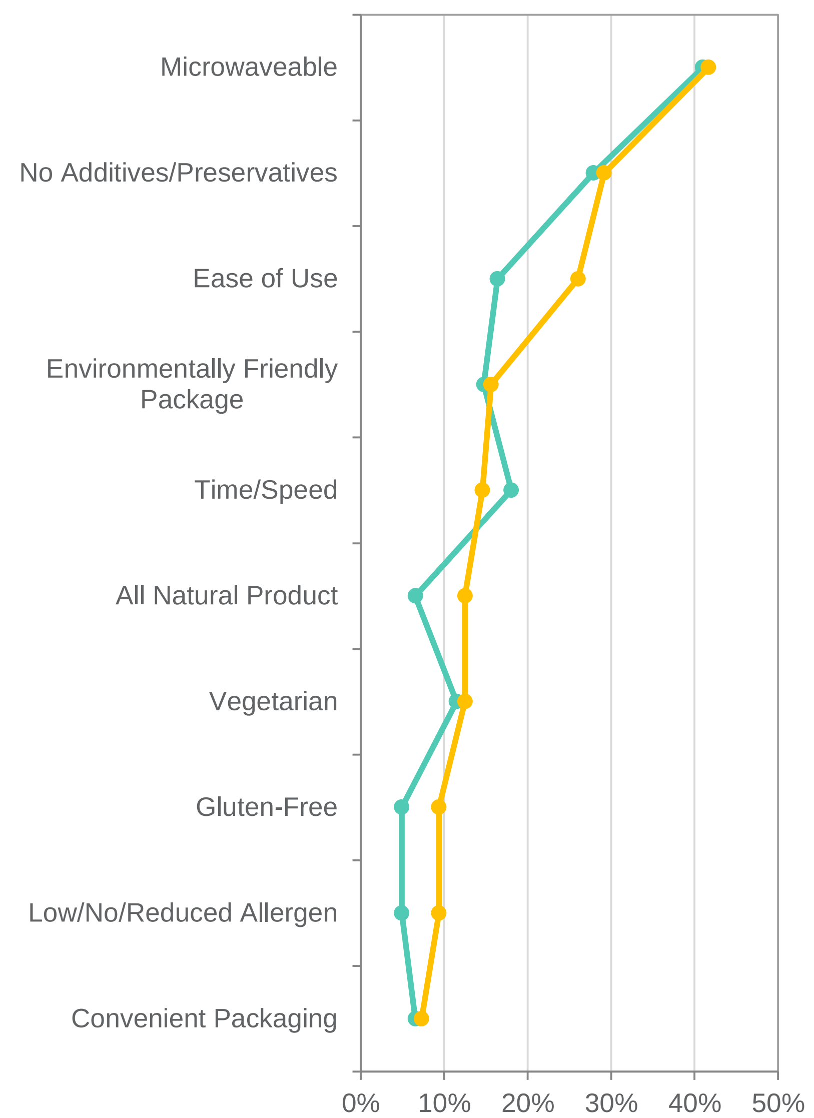
Top Claims & Pack Formats Used

- Flexible packaging continues to dominate as the leading pack format for new products containing cauliflower (consistent with all previous waves).
- The same claims, “Microwaveable” and “No-added” claims were highest used claims for products launched (also consistent with previous waves).

Pack Formats Launched



Top Claims Used



Europe (N=61) Global (N=96)

Number of Global Cauliflower NPDs for the L3M N=96
Only shown for global and Europe as sample (other regions sample size for launches were N<30)

Innovative Cauliflower Launches:
L3M (December–February 2013/14)

Dia Vegetable Cream (Spain)

Dia Crema de Verduras (Vegetable Cream) is now available. The product retails in a 75g pack.

Claims:
No information.

Tesco Fish Salad with Yogurt (Czech Republic)

Tesco Rybí Salát s Jogurtem (Fish Salad with Yogurt) has been made from marinated herrings. This product retails in a 150g pack.

Claims:
No information.

Auchan Primo Prezzo Frozen Cauliflower (Italy)

Auchan Primo Prezzo Cavolfiore (Frozen Cauliflower) is now available. The product can be pan cooked in eight to ten minutes or pressure cooked in four to five minutes, and retails in a 1kg pack.

Claims:
Economy

Maggi Vegetable Stock Pots (UK)

Maggi Vegetable Stock Pots have been repackaged in a new 144g pack, which features a recipe suggestion. It is suitable for vegetarians and can be dissolved in boiling water, added during cooking or stirred in once the recipe is cooked. It contains 34% less salt than stock cubes and is free from added MSG, hydrogenated vegetable oil & artificial colours.

Claims:
No Additives/Preservatives, Low/No/Reduced Sodium, Vegetarian, Low/No/Reduced Transfat

Source: Mintel (2014)

Innovative Cauliflower Launches:
L3M (December–February 2013/14)

Batchelor's Cup A Soup Broccoli & Cauliflower Soup (India)

Batchelor's Cup A Soup Broccoli & Cauliflower Soup has been repackaged in a newly designed pack. This vegetarian soup is low in fat and sugar, and contains no artificial colours or preservatives. The product is easy and quick to prepare, and retails in a 101g partially recyclable pack that with four sachets.

Claims:
No Additives/Preservatives, Ethical - Environmentally Friendly Package, Low/No/Reduced Fat, Time/Speed, Ease of Use, Vegetarian, Low/No/Reduced Sugar

Sweet Beet -Shallot Crackers (France)

Trésors Gourmands The Petit Crispy Gemüse Waffeln (Sweet Beet -Shallot Crackers) are all natural, 50% vegetable waffle-style crackers. The oven backed product is rich in fibres, and free from preservatives and palm oil. It provides 62kcal per serving and retails in a 37g ready-to-serve, practical and recyclable pack of around 25 crackers.

Claims:
No Additives/Preservatives, All Natural Product, Ethical - Environmentally Friendly Package, Convenient Packaging, High/Added Fibre

Choice L Cherry Tomato & Cauliflower Salad (South Korea)

Choice L Cherry Tomato & Cauliflower Salad is a healthy salad mix of vitamin enriched cherry tomatoes, cauliflower, romaine lettuce, bok choy and radicchio. The product is HACCP certified and retails in a 165g pack.

Claims:
Vitamin/Mineral Fortified

Aubergine and Courgette Lasagne with Soy and Vegetables Filling (Brazil)

Aubergine and Courgette Lasagne with Soy and Vegetables Filling is said to be 100% natural and healthy. This lasagne is free from gluten, lactose, trans fat and preservatives, is low in calories, has high fibre content and low GI index.

Claims:
Low/No/Reduced Lactose, No Additives/Preservatives, All Natural Product, Low/No/Reduced Allergen, Low/No/Reduced Calorie, High/Added Fibre, Time/Speed, Microwaveable, Ease of Use, Gluten-Free, Low/No/Reduced Transfat, Low/No/Reduced Glycaemic

Source: Mintel (2014)

Innovative Cauliflower Launches:
L3M (December–February 2013/14)

Knorr Gourmet Broccoli with a Touch of Cauliflower Soup in a Cup (Israel)

This instant soup is kosher certified, free from preservatives, monosodium glutamate and food colouring, and retails in a 24g pack.

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

Chicken & Five Vegetables Cream Sauce Set (Japan)

Chicken & Five Vegetables Cream Sauce Set is easy-to-use microwaveable product. It features penne pasta with meat sauce, German potato salad and creamy chicken with vegetables.

Claims:
Ease of Use, Economy, Microwaveable

Tau Delta Delicious Gourmet Tartar Salad Dressing (Argentina)

Tau Delta Delicious Gourmet Salsa Tártara Aderezo para Ensaladas (Tartar Salad Dressing) is now available. The product retails in a 250cc. pack.

Claims:
No information

Spoons South Indian Stew (Sweden)

Spoons Sydindisk Gryta (South Indian Stew) is a ready to eat stew, made with vegetables and lentils. This vegan and vegetarian stew is said to be healthy with a taste of the World. This microwaveable product is free lactose, gluten, and additives, is 100% natural, low in fat and salt, and high in fibre.

Claims:
Low/No/Reduced Lactose, No Additives/Preservatives, All Natural Product, Low/No/Reduced Allergen, No Animal Ingredients, Social Media, High/Added Fibre, Vegan, Low/No/Reduced Fat, Microwaveable, Ease of Use, Gluten-Free, Low/No/Reduced Sodium, Vegetarian

Source: Mintel (2014)

Australian Cauliflower Launches:
L3M (December 2013- February 2014)

Coles Sweet Mustard Pickles

Coles Sweet Mustard Pickles have been relaunched from the Coles Farmland brand. This product retails in a 520g recyclable jar.

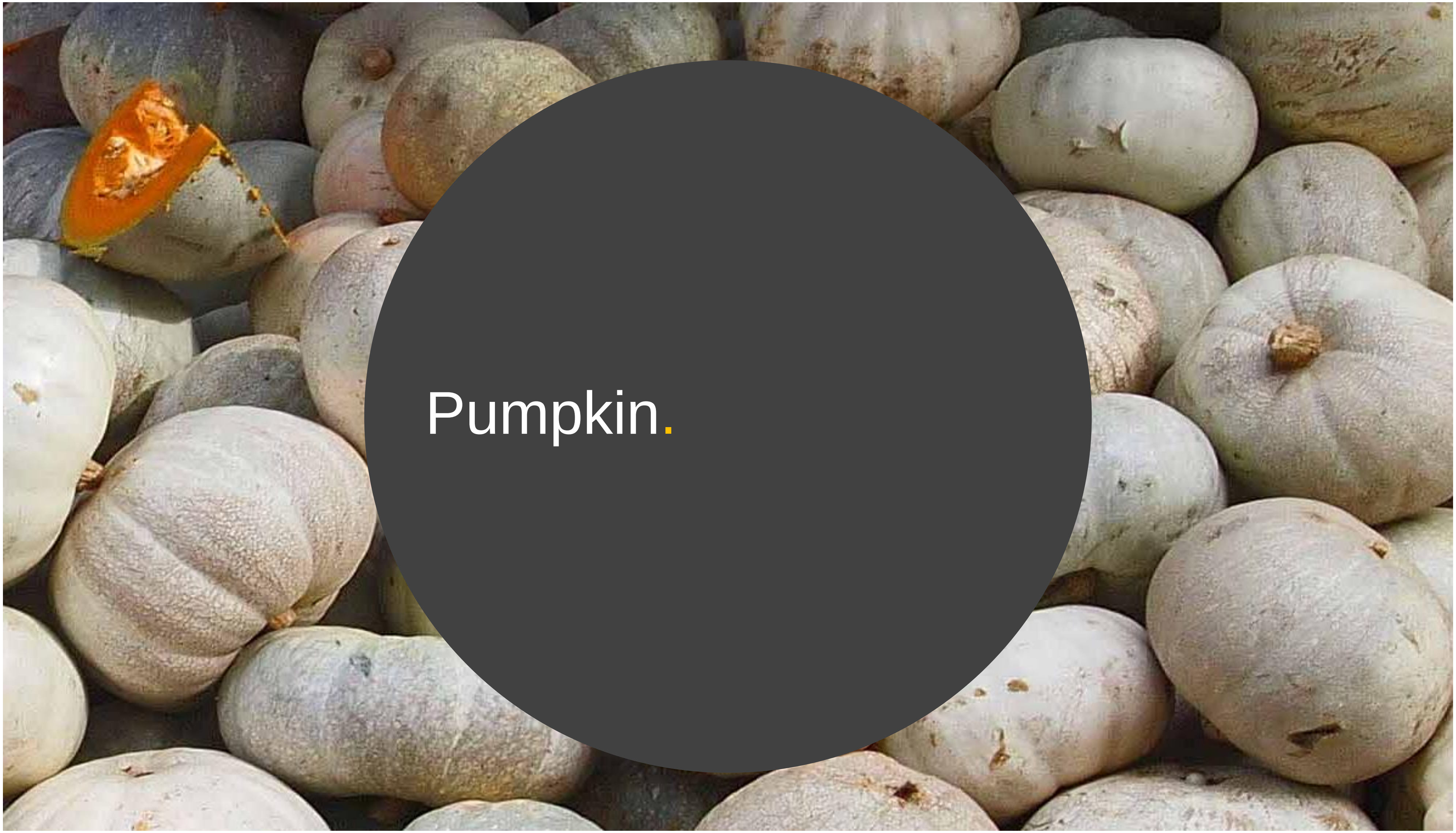
Claims:
Ethical - Environmentally Friendly Package

Sirena Puttanesca Style Tuna & Rice

Sirena Puttanesca Style Tuna & Rice is described as a healthy and convenient meal made with all natural ingredients. This microwavable rice dish is a good source of omega 3, is gluten-free and contains no preservatives. It is ready to eat and retails in a 190g easy-to peel recyclable pack, featuring the Sustainably Caught logo.

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

Source: Mintel (2014)



Pumpkin.

Purchase and Consumption Behaviour

Average Purchase 3.2 times per month

▼ 3.0 times, Wave 1

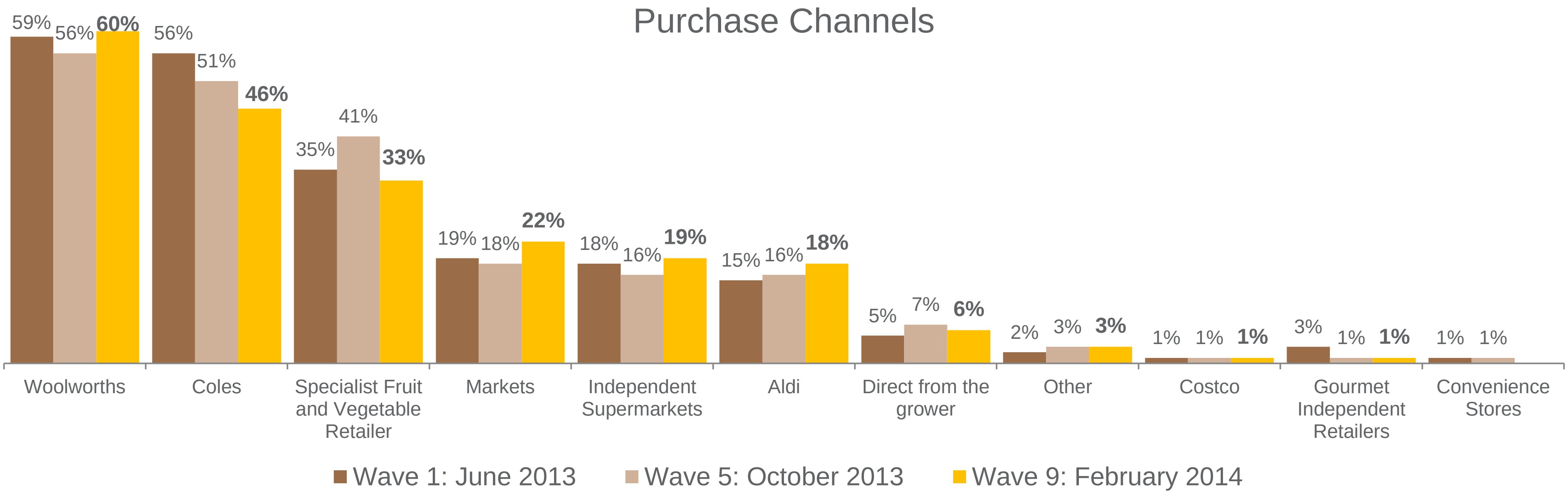
▼ 3.1 times, Wave 5

Average Consumption 8.5 times per month

▼ 8.3 times, Wave 1

▲ 9.1 times, Wave 5

- Mainstream vegetable retailers (Woolworths & Coles) remained the key locations consumers purchased their pumpkin from.
- Purchase frequency and consumption frequency remained consistent through all seasons tracked.



Q1. On average, how often do you purchase pumpkin?
Q2. On average, how often do you consume pumpkin?
Q5. From which of the following channels do you typically purchase pumpkin?
Wave 1 N=513 Wave 5 N=391 Wave 9 N=305

colmar brunton.

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

Average Spend & Price Sensitivity

Average weight of purchase

The average consumer typically purchased **1.5kg** of pumpkin, on par with Waves 1 and 5.

▼ 1.4kg, Wave 1

— 1.5kg, Wave 5

Recalled last spend

Recalled last spend on pumpkin was **$3.50**, slightly higher than previous months tracked.

▼ $3.10, Wave 1

▼ $3.30, Wave 5

Value for money

Consumers' perceived value for money was relatively good **(6.4/10)**. This is a significantly lower level of value perceived than Wave 1 (June 2013).

▲ 6.8/10, Wave 1

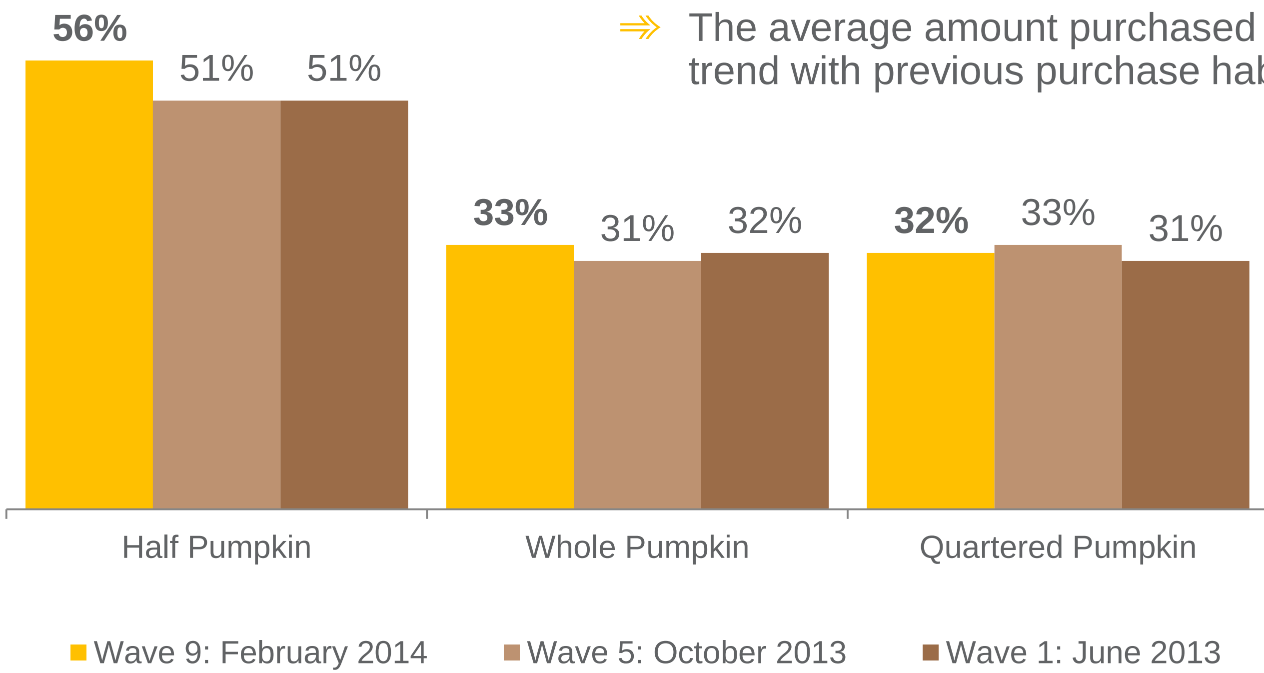
▲ 6.7/10, Wave 5

Q3. How much pumpkin 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)
Wave 1 N=513 Wave 5 N=391 Wave 9 N=305

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

Pack Formats Purchased

- Formats purchased were on trend with Wave 1 & 5, with half pumpkins purchased most frequently.
- The average amount purchased were similarly on trend with previous purchase habits.

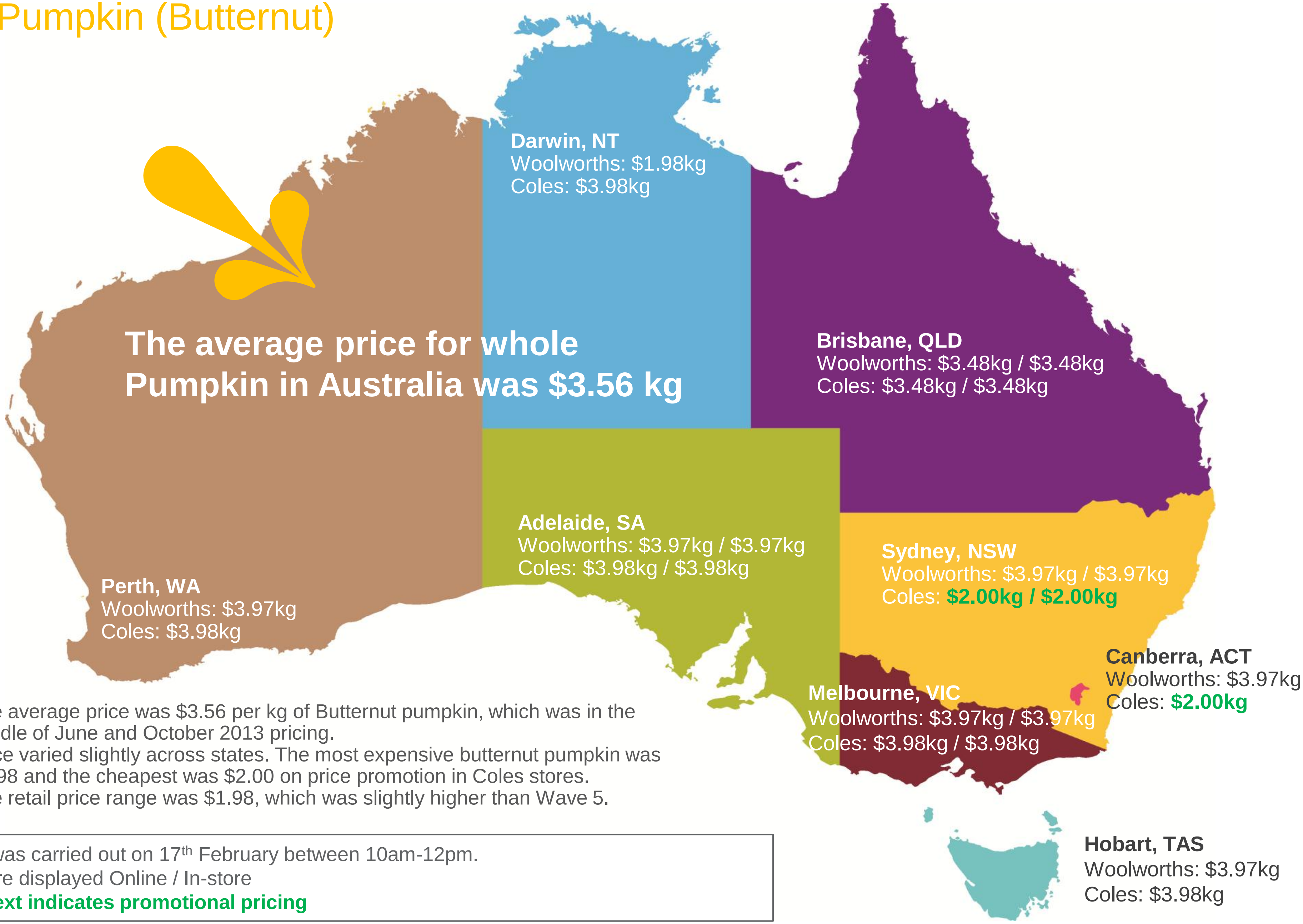


Average number purchased	Half Pumpkin	Whole Pumpkin	Quartered Pumpkin
Wave 1: June 2013	1.1	1.2	1.3
Wave 5: October 2013	1.1	1.4	1.4
Wave 9: February 2014	1.2	1.2	1.2

Q3a. How much pumpkin does this typically equate to?
Wave 1 N=513 Wave 5 N=391 Wave 9 N=305

Online and In-store Commodity Prices

Pumpkin (Butternut)

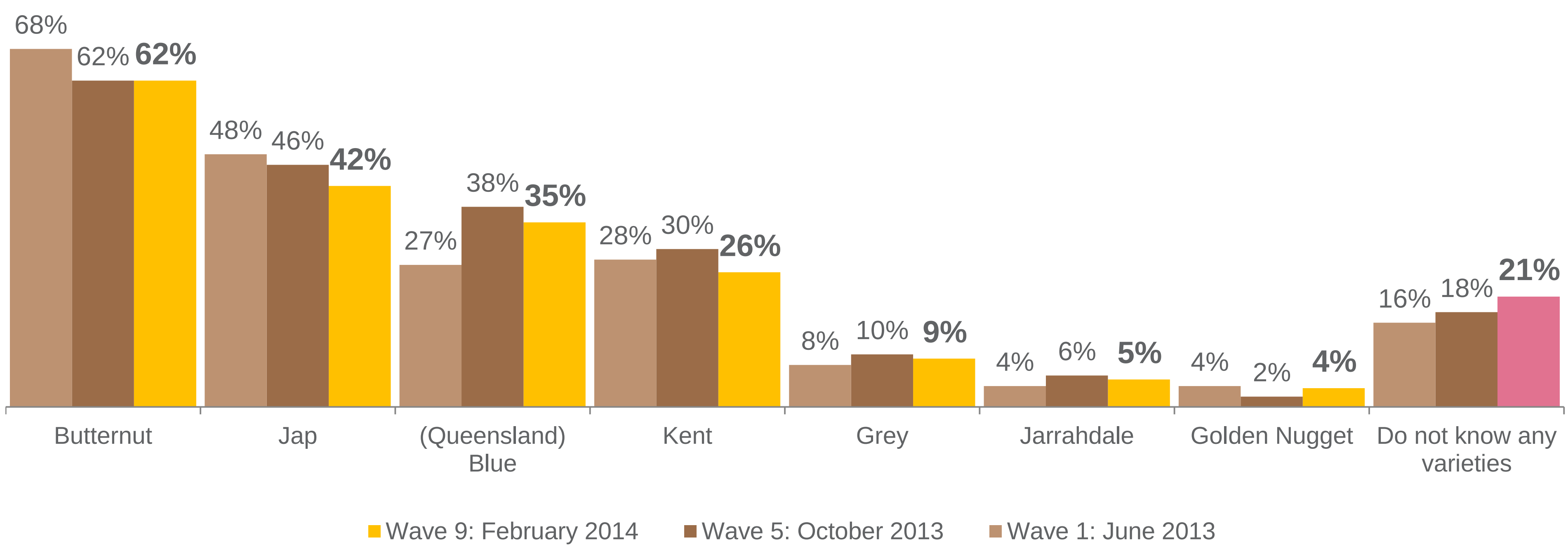


- The average price was $3.56 per kg of Butternut pumpkin, which was in the middle of June and October 2013 pricing.
- Price varied slightly across states. The most expensive butternut pumpkin was $3.98 and the cheapest was $2.00 on price promotion in Coles stores.
- The retail price range was $1.98, which was slightly higher than Wave 5.

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

Spontaneous Varietal Awareness

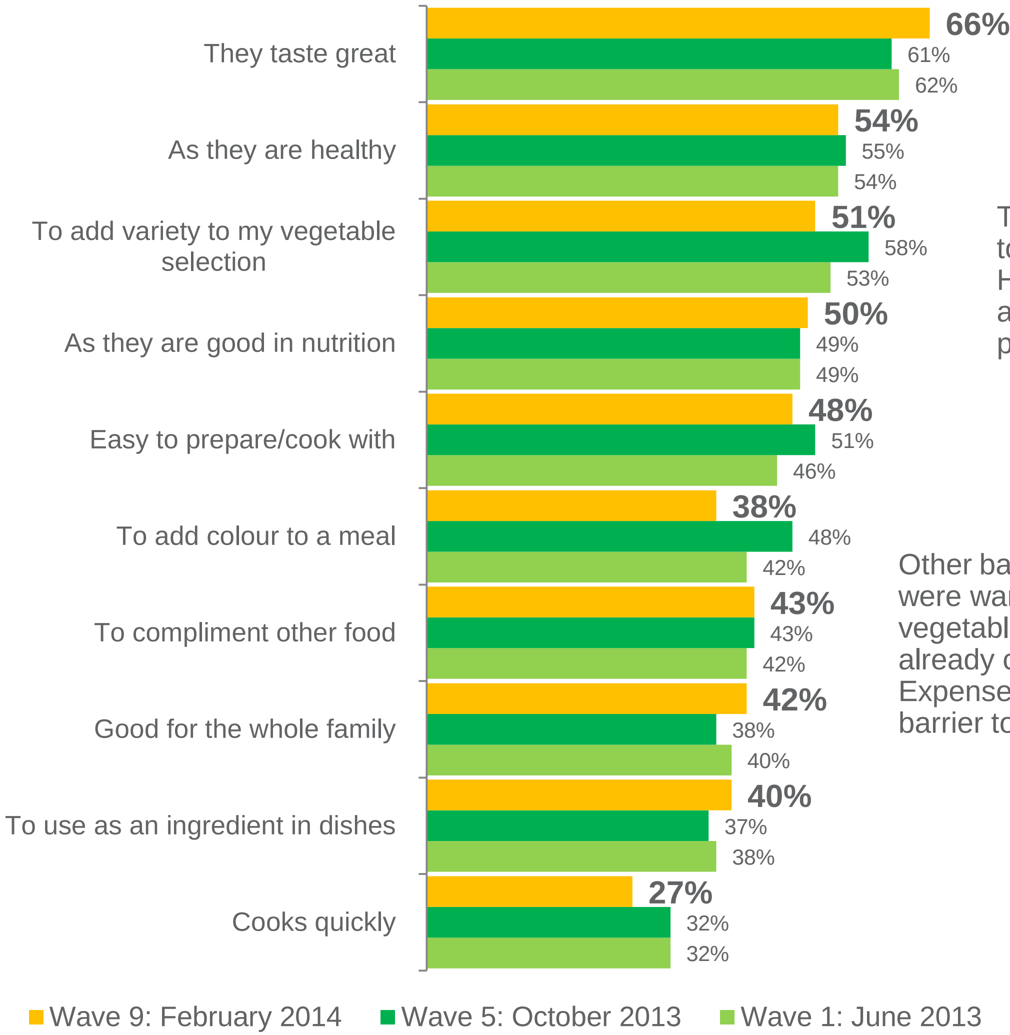
- The current wave indicated an overall decline in variety awareness of pumpkin, particularly compared with Wave 5 levels of awareness. This could be due to seasonality of pumpkin, whereby consumers are not purchasing the same varieties of pumpkin and may be purchasing on availability, what's in stock at the retail channel.
- One fifth of respondents were unable to recall a type of pumpkin.



Q6a. What varieties of pumpkin are you aware of? (unprompted)
Wave 1 N=513 Wave 5 N=391 Wave 9 N=305

Triggers & Barriers to Purchase

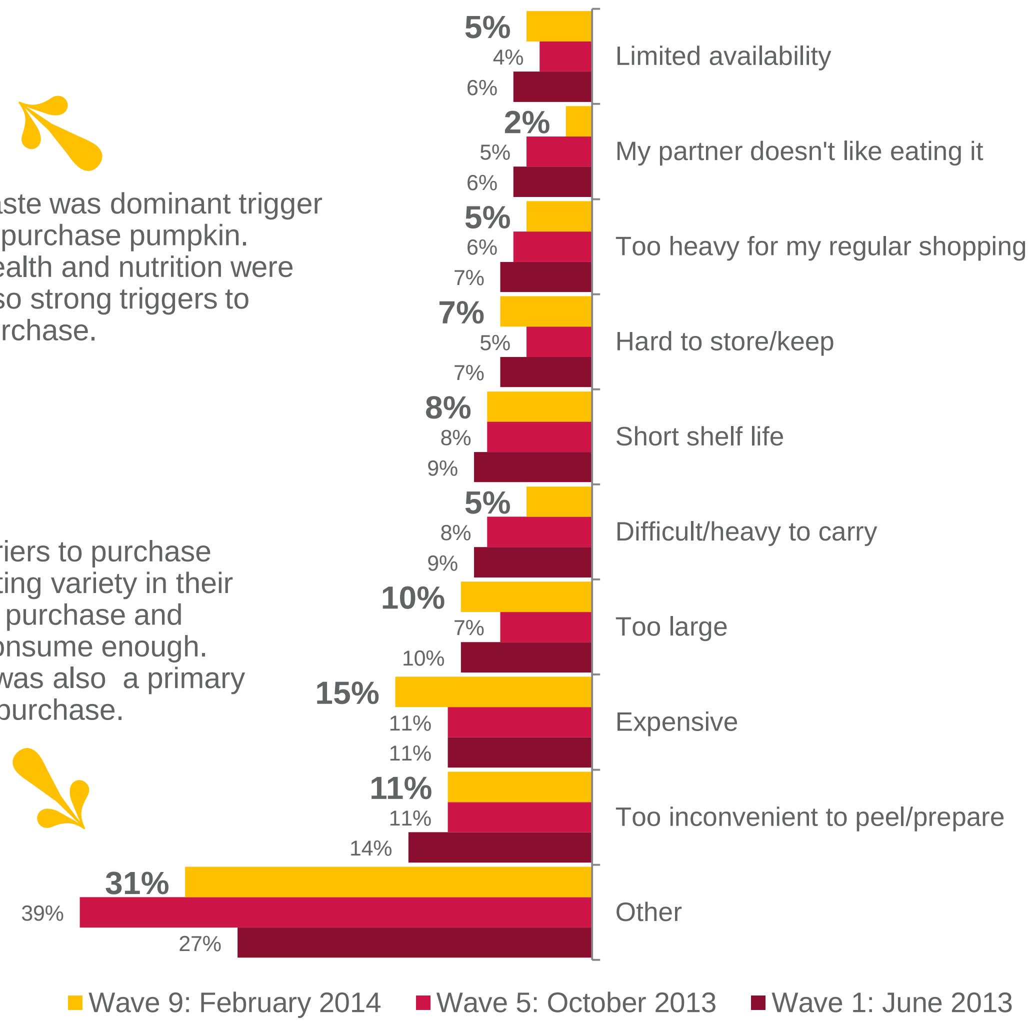
Triggers



Taste was dominant trigger to purchase pumpkin. Health and nutrition were also strong triggers to purchase.

Other barriers to purchase were wanting variety in their vegetable purchase and already consume enough. Expense was also a primary barrier to purchase.

Barriers



colmar brunton.

Q7. Which of the following reasons best describes why you purchase pumpkin?
Q8. Which reason best describes why you don't buy pumpkin more often?
Wave 1 N=513 Wave 5 N=391 Wave 9 N=305

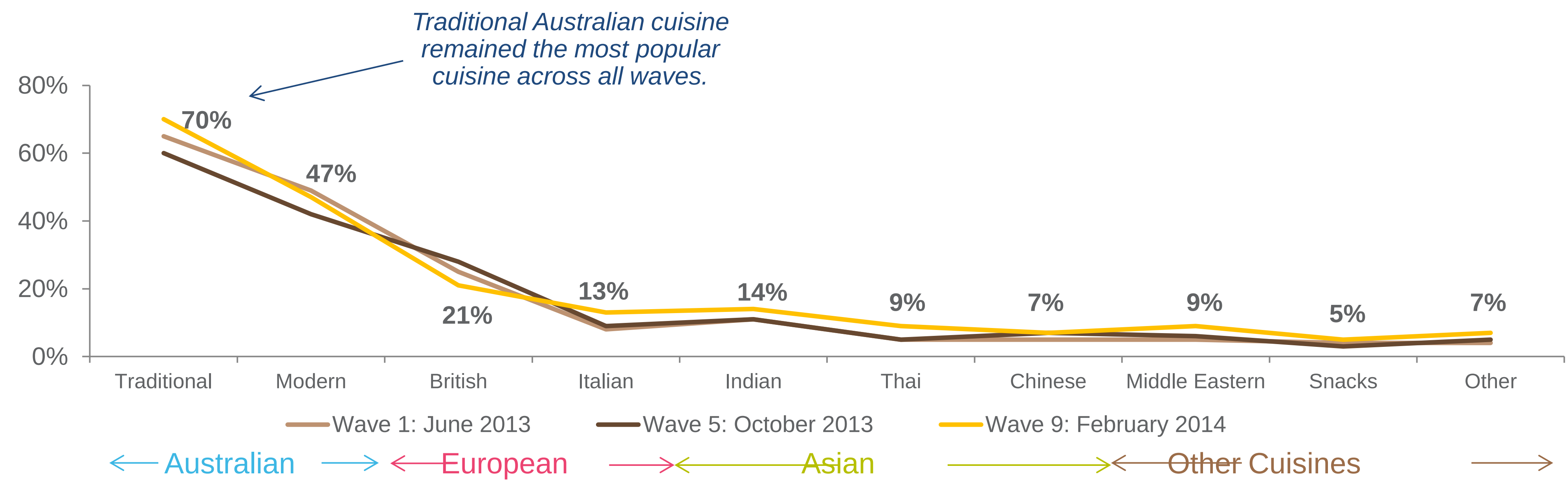
Cooking Preferences & Occasions

- Australian cuisine, both traditional and modern, were the typical cuisines cooked. There was little variability in cuisines cooked between waves.
- Weekday dinners, weekend dinners and family meals were the main consumption occasions.

Wave 9 Top 5 Consumption Occasions

Weekday dinner	64%	▼ Wave 1	▼ Wave 5
Weekend dinner	52%	▼ Wave 1	— Wave 5
Family meals	46%	▼ Wave 1	▼ Wave 5
Every-day meals	25%	▲ Wave 1	▲ Wave 5
Quick meals	18%	▼ Wave 1	▼ Wave 5

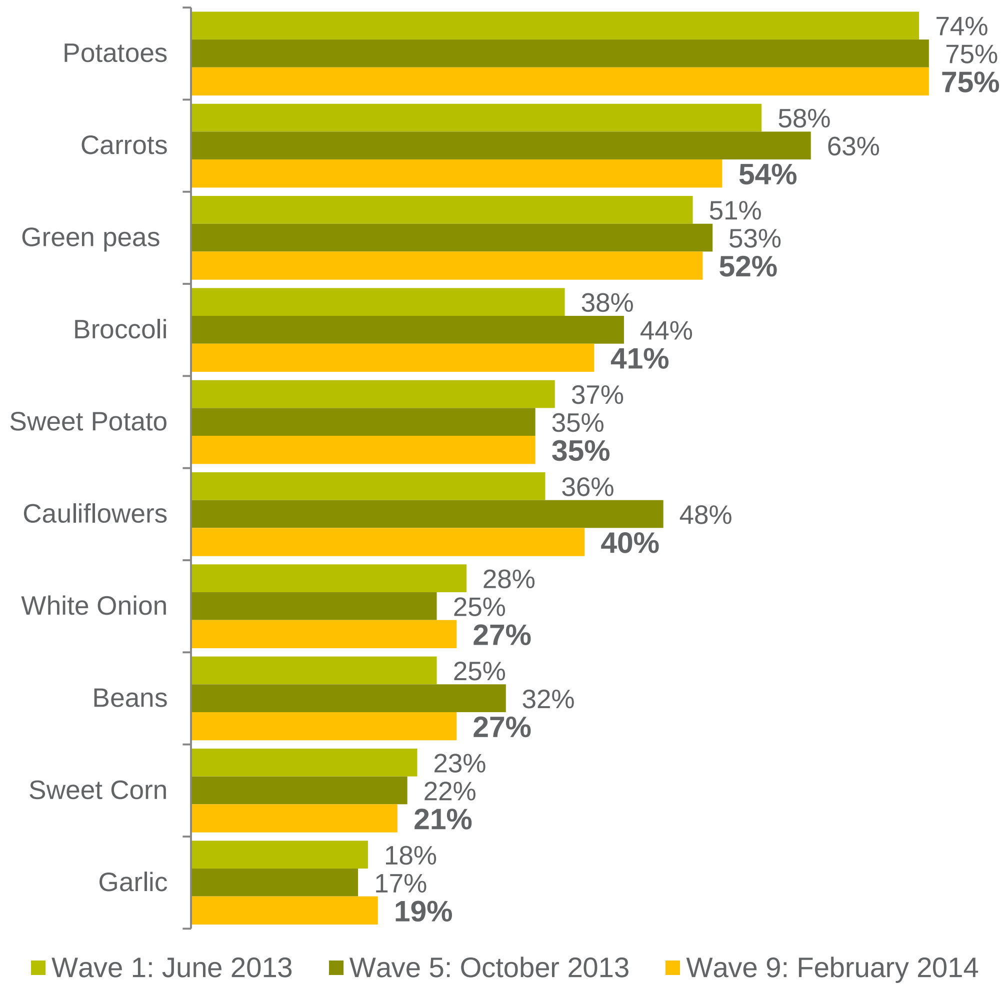
Typical Cuisine Cooked



Q10. What cuisines do you cook/consume that use pumpkin?
Q11. Which of the following occasions do you typically consume/use pumpkin?
* Indicates significant difference between waves.

Cooking Preferences & Occasions:

Top 10 Accompanying Vegetables



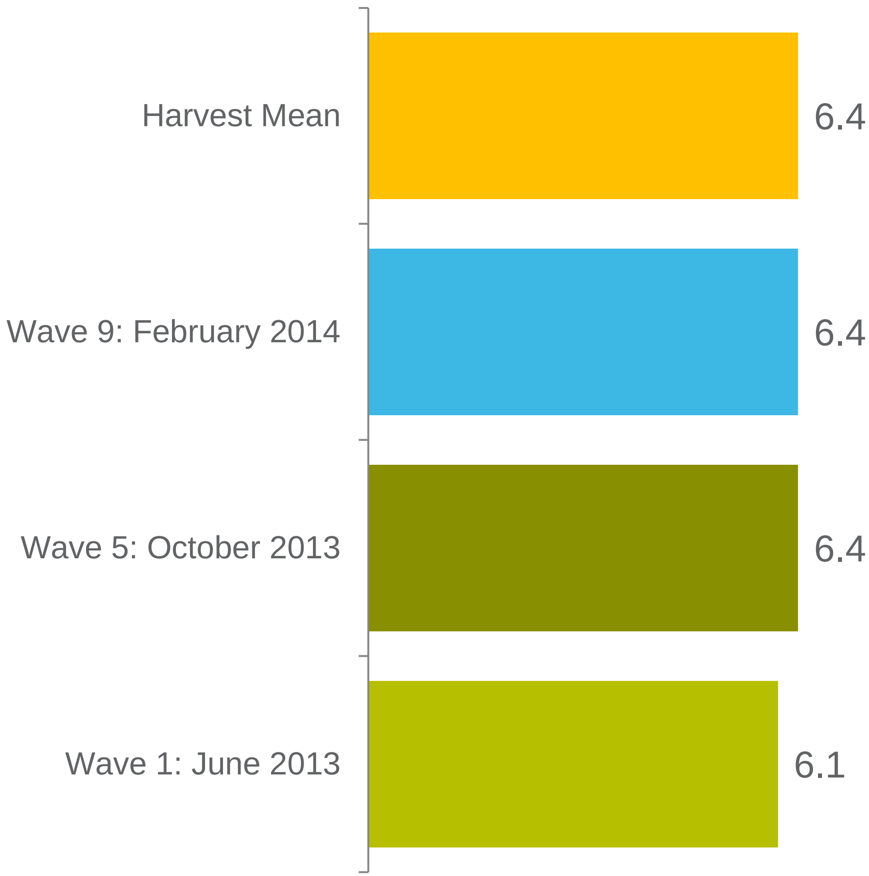
- Across waves there was variability in accompanying vegetables, specifically carrots, cauliflowers and beans. However, pumpkin was consistently served with potatoes.
- Roasting was the dominant cooking style, on trend with previous waves.

Top 10 Cooking Styles			
	Wave 1	Wave 5	Wave 9
Roasting	**65%**	**64%**	**69%**
Soup	**45%**	**49%**	**47%**
Baking	43%	47%	44%
Mashing	42%	46%	45%
Boiling	40%	39%	39%
Steaming	35%	39%	40%
Microwave	19%	20%	20%
Stewing	14%	16%	19%
Puree	11%	12%	12%
Stir frying	10%	10%	10%

Q9. How do you typically cook pumpkin?
Q10a. And when are you serving pumpkin which of the following do you also serve together with this?
* Indicates significant difference between waves.

Importance of Provenance

- Current importance of provenance was on trend with Wave 5 and Harvest mean, which were all higher than Wave 1 importance.



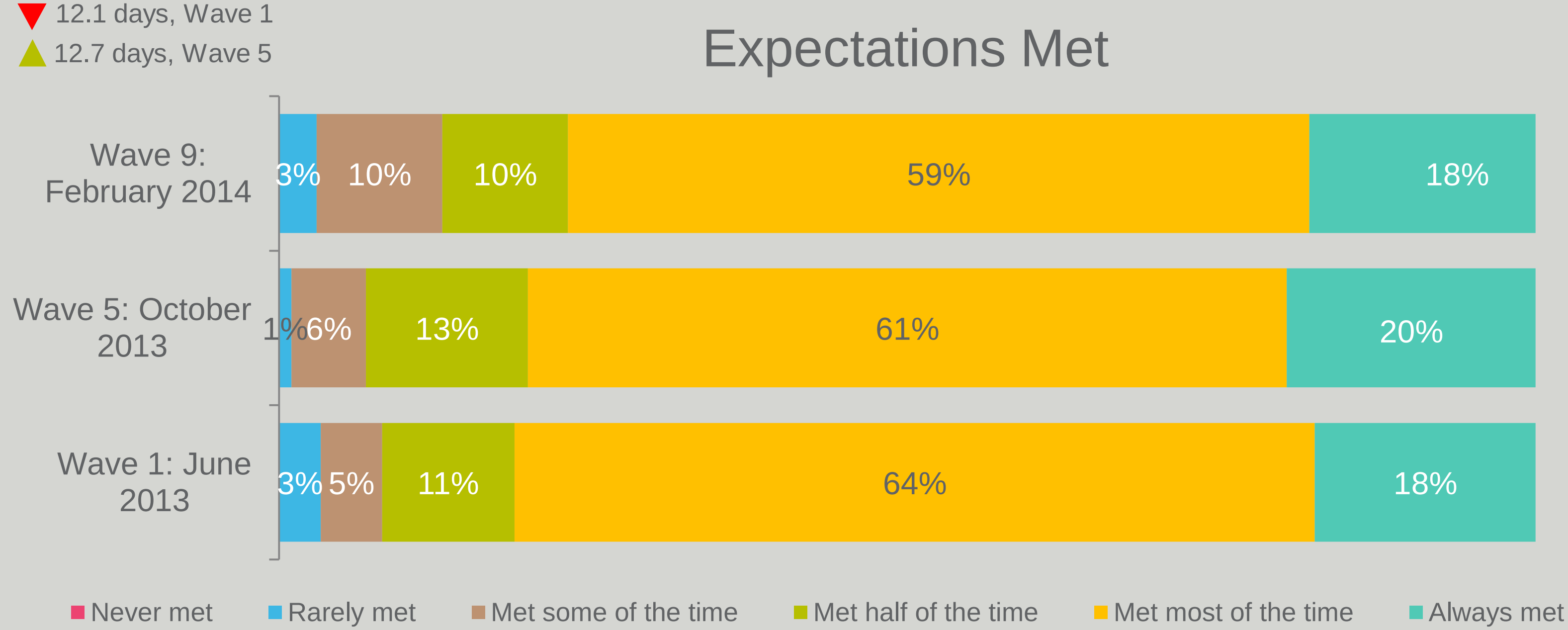
Q14. When purchasing <commodity>, how important is Provenance to you?
Wave 1 N=513 Wave 5 N=391 Wave 9 N=305

Freshness and Longevity

Expected to stay fresh for **12.2** days

▼ 12.1 days, Wave 1
▲ 12.7 days, Wave 5

- Pumpkin was expected to stay fresh for over 12 days, which was in line with previous results.
- Consumer expectations of pumpkin freshness were generally met, which had been relatively consistent across seasons and waves.



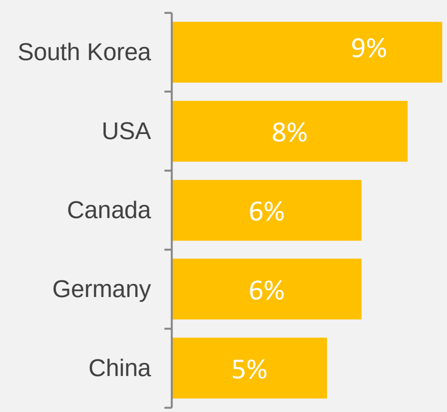
Q12. How long do you expect pumpkin to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy pumpkin?
Wave 1 N=513 Wave 5 N=391 Wave 9 N=305

Pumpkin Product Launch Trends.

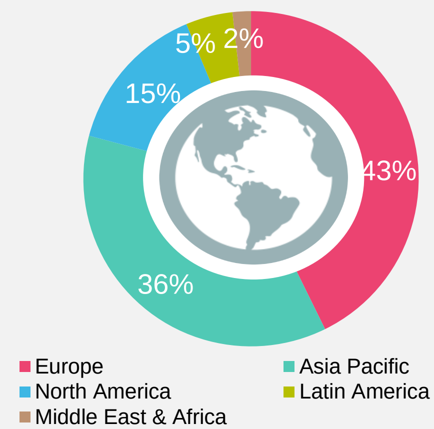
Pumpkin Global NPDs
December–February 2013/14

There were 508 new products launched over the last 3 months. The majority of these occurred in Europe and Asia Pacific.
The top categories containing pumpkin launched in the past 3 months were snacks, bakery goods and baby food.

Country

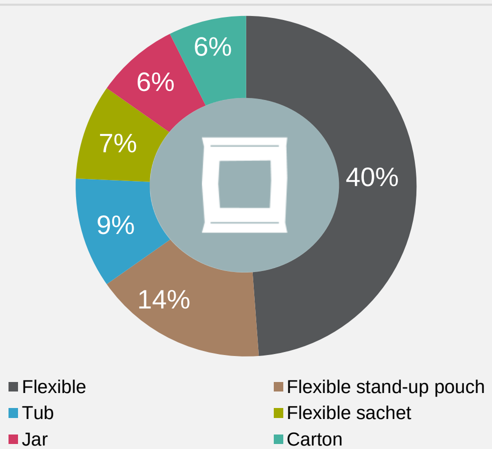


Region



508 Global NPDs

Top Pack Formats



Categories

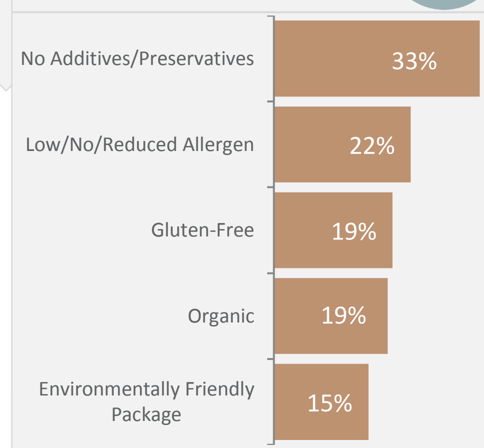
Snacks 23%

Bakery 14%

Baby Food 11%

Breakfast Cereals 10%

Top Claims



Pumpkin Product Launches:
Last 3 Months (December–February 2013/14)
Summary

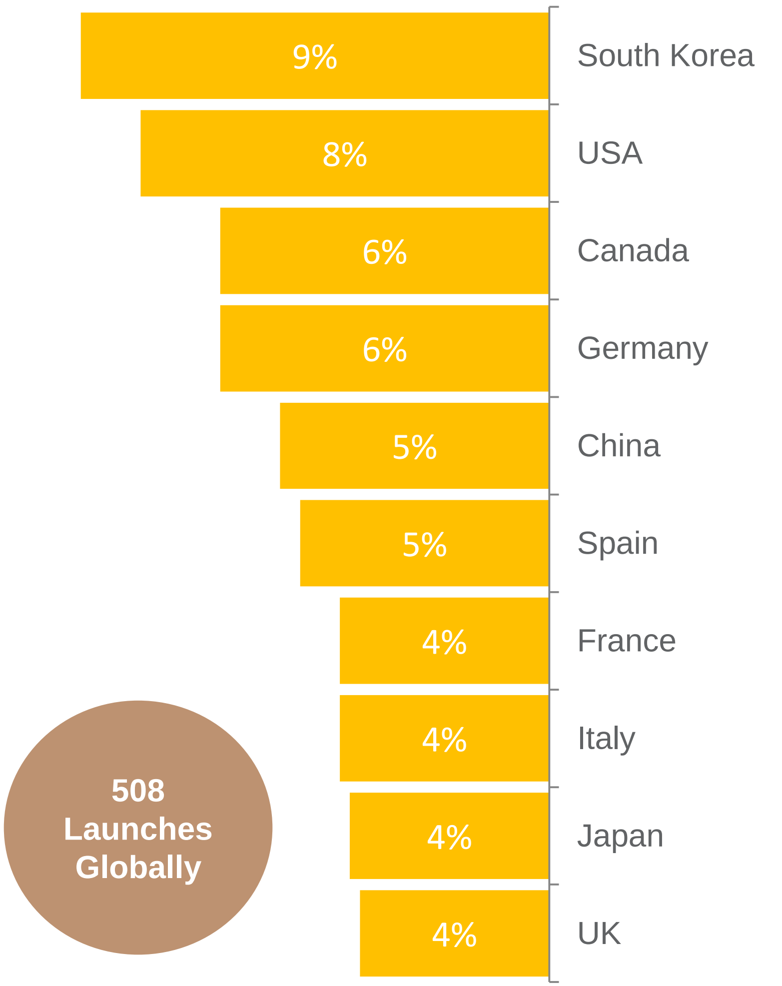
- A total of 508 products containing pumpkin as an ingredient were launched globally in the last 3 months, on trend with the previous quarter (509 product launches).
- There were 13 pumpkin launches in Australia this quarter compared to 17 launches in the prior.
- Europe and the Asia Pacific were the top 2 regions where these products were launched (43% and 36% respectively). This is on trend with all previous quarters tracked.
- Flexible packaging (incl. standing flexible) was the dominant pack format used for launches (44%). This was the same as previous quarters tracked.
- Top categories for product launches were snacks (23%), bakery goods (14%), baby food (11%) and breakfast cereals (10%). These categories were on trend with previous quarters tracked.
- Core claims for product launches globally were based around health (e.g. no additives/preservatives 33%, low allergen 22%, gluten-free 19% and organic 19%), all on trend with previous waves.
- The most innovative launches found were; Banana Pumpkin Whole Milk Yogurt & Sweet Pumpkin Muffins (examples of these products can be found at the end of the pumpkin trend report).

Source: Mintel (2014)

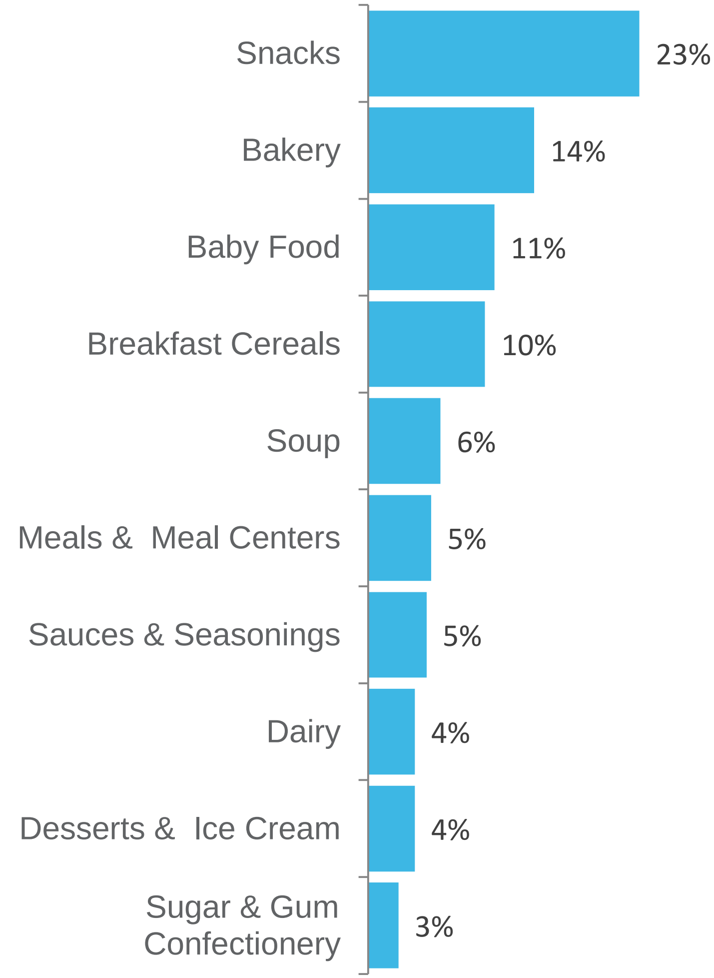
Pumpkin Launches
Country & Categories

- The most active countries for launches in the last 3 months were South Korea and the USA.
- Snacks continue to be the dominant new product type being launched globally containing pumpkin as an ingredient.

Top 10 Launch Countries



Top 10 Launch Categories



Number of Global Pumpkin NPD for the L3M N=508

colmar brunton.

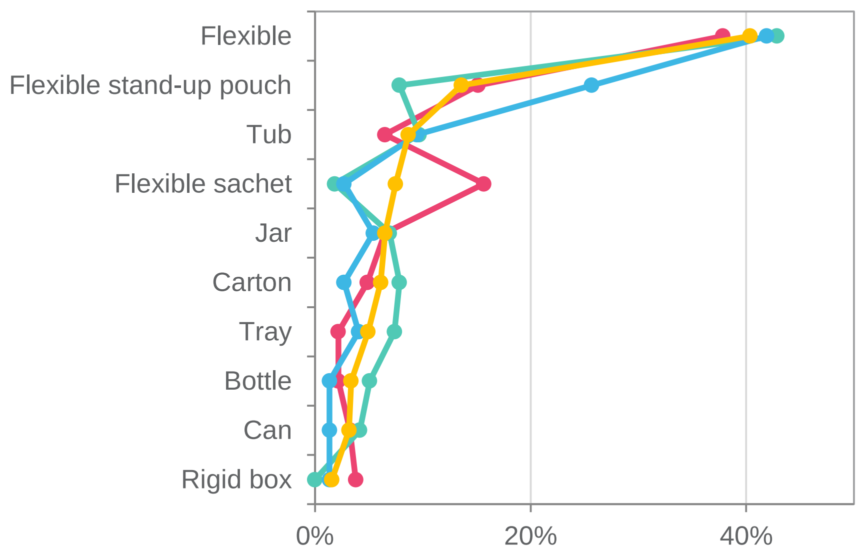
Pumpkin Launches

Top Claims & Pack Formats Used

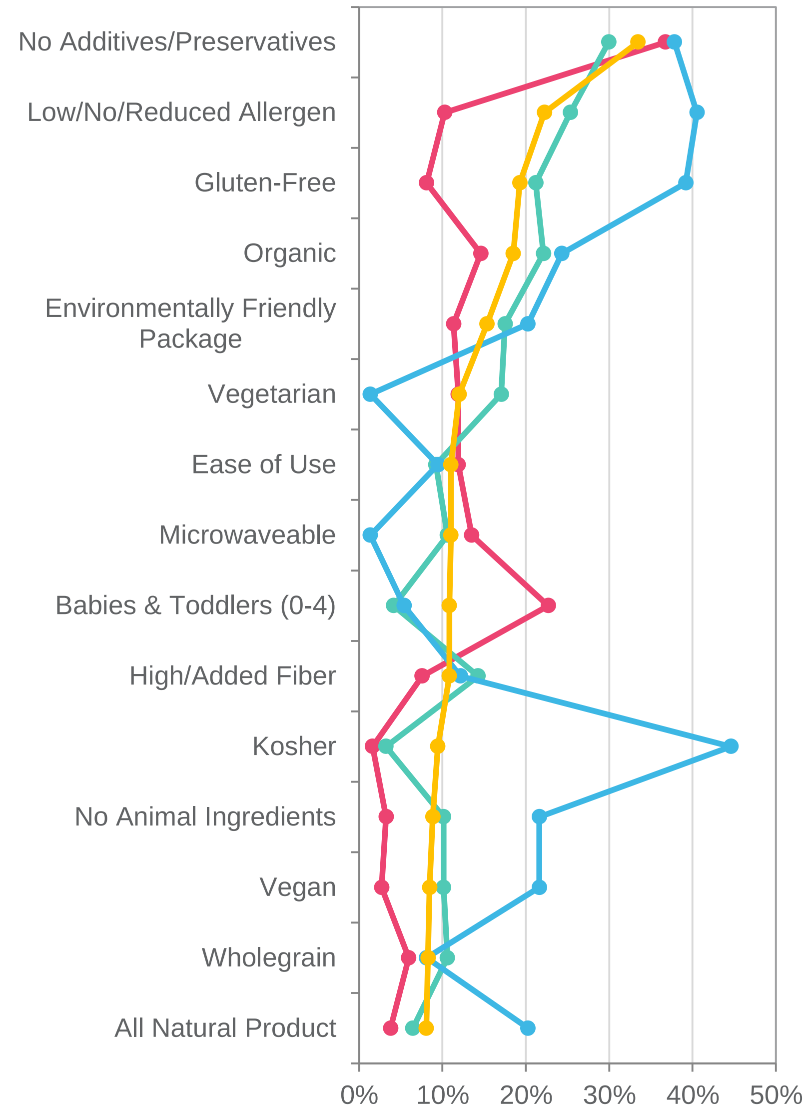
- Top claims for launches globally were No Additives/Preservatives, Low Allergen and Gluten-free (consistent with previous waves). Claims used in North America differed to other regions due to the prevalence of pumpkin products being launched that were sweet tasting and less savoury (typically the global standard).

- Flexible packaging remains as the dominant pack format being used for pumpkin products.

Pack Formats Launched



Top Claims Used



Asia Pacific (N=185) Europe (N=217)
North America (N=74) Global (N=508)

Number of Global Pumpkin NPD for the L3M N=508
Only regions with n >30 are displayed

Innovative Pumpkin Launches:
L3M (December–February 2013/14)

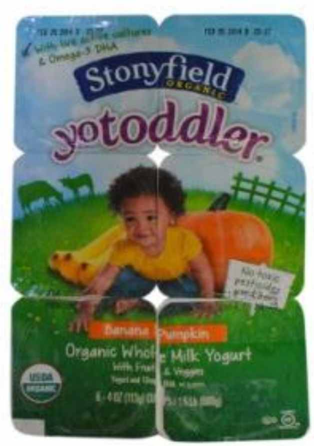
Schnitzer Glutenfree Black Forest Corn Bread with Teff (Germany)

Schnitzer Glutenfree Black Forest Maisbrot mit Teff (Black Forest Corn Bread with Teff) has been relaunched. This organic bread with pumpkin seeds and teff is free from gluten and milk.

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

Stonyfield Organic Yotoddler Banana Pumpkin Whole Milk Yogurt (USA)

This grade A product with live active cultures, omega-3 DHA, and added vitamin D has been USDA organic, kosher and gluten free certified. Omega-3 DHA support brain, eye and nerve development.



Claims:
No Additives/Preservatives, Vitamin/Mineral Fortified, Low/No/Reduced Allergen, GMO-Free, Brain & Nervous System (Functional), Gluten-Free, Other (Functional), Kosher, Ethical - Environmentally Friendly Product, Organic, Social Media, Babies & Toddlers (0-4), Hormone Free

Samlip Table8 Super Food Sweet Pumpkin Muffin (South Korea)

Samlip Table8 Super Food Sweet Pumpkin Muffin is now available. The product is made with sweet pumpkin that is said to be regarded as one of the 'superfoods'. It retails in a 378g pack containing six pieces.

Claims:
Organic, Ethical - Environmentally Friendly Package

Barbara's Morning Oat Crunch (Mexico)

Barbara's Morning Oat Crunch Cereal Mini Almohaditas de Trigo y Avena Sabor Mora Azul (Mini Blueberry Burst Cereal) is now available with a new name, previously known as Barbara's Shredded Minis, and in a newly designed 370g recyclable pack printed with earth-friendly inks and featuring the FSC and Rainforest Alliance logos.

Claims:
GMO-Free, Kosher, Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Ethical - Human, Wholegrain, Cardiovascular (Functional), Carbon Neutral, High Satiety

Source: Mintel (2014)

Innovative Pumpkin Launches:
L3M (December–February 2013/14)

Baggio de la Huerta Línea Gourmet Portuguese Sauce (Argentina)

Baggio de la Huerta Línea Gourmet Salsa Portuguesa con Aceite de Oliva (Portuguese Sauce with Olive Oil) is new to the range. This sauce comprises tomatoes, onions, garlic, and green pepper, with extra virgin olive oil, and can help to make dishes tastier, healthier, lighter, and easier.

Claims:
Ethical - Environmentally Friendly Package, No Additives/Preservatives, Low/No/Reduced Cholesterol, Ease of Use, Convenient Packaging

Alpina Greek Superfoods Plain Nonfat Yogurt with Artisan Granolas (USA)

Made from all natural ingredients and is free of gluten and artificial sweeteners. The kosher certified product retails in a 6-oz. pack with a separate attached container of Udi's granola.

Claims:
Cobranded, No Additives/Preservatives, All Natural Product, Low/No/Reduced Allergen, Kosher, Low/No/Reduced Fat, Gluten-Free

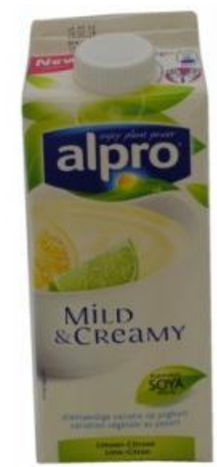
Popchips Sea Salt Veggie Chips (USA)

Popchips Sea Salt Veggie Chips have not been fried or baked but are air popped. They contain 50% less fat than regular fried potato chips and are free from gluten, cholesterol, saturated fat, trans fat, preservatives, artificial flavours and colors. These chips are made with a blend of nine vegetables and a touch of sea salt.

Claims:
No Additives/Preservatives, Low/No/Reduced Allergen, Low/No/Reduced Cholesterol, No Animal Ingredients, Vegan, Kosher, Low/No/Reduced Fat, Low/No/Reduced Saturated Fat, Gluten-Free, Low/No/Reduced Transfat

Alpro Mild & Creamy Lime & Lemon Soy Yogurt (Belgium)

Alpro Mild & Creamy Yaourt Soya Lime Citron (Lime-Lemon Soy Yogurt) is 100% vegetable based and can be enjoyed as a snack. This product is described as unctuous and deliciously nutritious, is a source of vegetable proteins and is a source of calcium and vitamins B2, B12, D2.



Claims:
Low/No/Reduced Lactose, No Additives/Preservatives, Vitamin/Mineral Fortified, Low/No/Reduced Allergen, Social Media, Vegan, Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Low/No/Reduced Saturated Fat, No Animal Ingredients, Added Calcium

Source: Mintel (2014)

Innovative Pumpkin Launches:
L3M (December–February 2013/14)

Dream Golden Field Pumpkin Flavoured Biscuits (China)

Dream Golden Field Nan Gua Wei Bing Ban (Pumpkin Flavoured Biscuits) are made with brown sugar and contain added pumpkin and pumpkin seeds. This product is halal certified and retails in a 300g pack containing 24 pieces.

Claims:
Halal

Torto Instant Pumpkin Dessert (China)

Torto Ji Rong Nan Gua Gu (Instant Pumpkin Dessert) features a convenient formula and is free from preservatives and artificial colourings. According to the manufacturer, pumpkin is rich in antioxidants and dietary fibre and helps to promote healthy vision and strengthen the immune system.

Claims:
No Additives/Preservatives, Immune System (Functional), Ease of Use, Brain & Nervous System (Functional), High/Added Fibre, Time/Speed, Halal, Antioxidant

Earth & Vine Provisions Mandarin Pumpkin Marmalade (USA)

Earth & Vine Provisions Mandarin Pumpkin Marmalade is all-natural and gluten-free. The product retails in a 10-oz. jar and was on display at the Winter Fancy Food Show 2014 in San Francisco, USA.

Claims:
Gluten-Free, All Natural Product, Low/No/Reduced Allergen

Eroski Sannia Toasted Salt-Free Pumpkin Seeds (Spain)

Eroski Sannia Pipa Calabaza sin Sal Tostada (Toasted Salt-Free Pumpkin Seeds) contain 99% less salt than other brands. The gluten free product is high in fibre and protein and retails in a 75g pack.

Claims:
Low/No/Reduced Allergen, High/Added Fibre, High Protein, Gluten-Free, Low/No/Reduced Sodium, Cardiovascular (Functional)

Source: Mintel (2014)

Top Australian Pumpkin Launches:
L3M (December 2013- February 2014)

Helga's Continental Bakehouse Gluten Free 5 Seeds Bread

Mayver's All Natural Pepita Spread

Samudra Bio-Live Foods Mixed Berry Bliss Muesli

Pawprint Chocolate Forest Floor Chocolate

Woolworths Gold Oven Baked Premium Nut Muesli

Coles Salad Fix Pearl Barley, Spinach, Pumpkin Salad

Woolworths Select Once Upon A Time Hearty Beef Stew

Woolworths Gold Heavenly Strawberries & Cream Cookies

Woolworths Select Once Upon A Time Potato, Pumpkin Casserole

Coles Simply Gluten Free Fruit Free Muesli Bars

Food for Health Liver Cleansing Muesli

Lindt Swiss Luxury Selection Chocolate Selection

Source: Mintel (2014)

In the Media.

General Vegetable News
(December 2013- February 2014)

- An ABARES study found a 40% decrease in the average farm income over the 2012-2013 season. The drop in income is due to rising costs, lower returns and weather disruptions.

- A call from restaurants and chefs in the industry want a greater understanding of the produce they sell, including species, provenance and farms the produce is sources from. Using restaurants is a great medium to reach consumers and educate them on the produce available.

(www.abc.net.au)

Commodity News
(December 2013- February 2014)

- An article published in China highlighted the health benefits of swapping starchy carbs (rice and potatoes) for cauliflower.

- Cauliflower has been named a hot commodity of 2014 and has also been crowned the 'new kale' by Canadian media.
(www.scmp.com/lifestyle/health)

- Pumpkin seeds have been recommended for insomnia because it boosts serotonin levels, which induces relaxation.
(www.examiner.com)

- Some top health benefits of Pumpkin are good for digestive health as they are high in fibre, lowers you risk of heart disease and can lowers risk of breast cancer.
(www.health.india.com)

- The black carrot originated in Asia and Eastern Mediterranean and are still grown and consumed in these areas.
(www.dnaindia.com)

- Navy bean growers were concerned about the possible close of the SPC Ardmona Victorian factory. The closure of the factory would possibly lead to the end of the Navy bean industry, which is the main ingredient in baked beans.
(www.abc.net.au)

Thanks.