

A close-up photograph of a person's hand holding a freshly harvested carrot. The hand is positioned in the center, with the thumb and index finger gripping the green stem of the carrot. To the right, several other carrots are hanging vertically, their orange roots and green tops clearly visible. In the background, there are large green leaves, likely from a vegetable plant, and a white plastic mulch or container. The overall scene is set in a garden or field, with natural lighting and a soft focus on the background.

Horticulture Australia and AUSVEG.

VG12078 Project Harvest.

Monthly Tracker Report Wave 8: January 2014

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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 8, January 2014) focuses on:

- Asian Vegetables
- Baby Spinach
- Brussels Sprouts
- Capsicums

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, i.e. since September.





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.

General Respondent Questions

Demographics

Vegetable Consumption

Commodity
1

Commodity
2

Commodity
3

Commodity
4

Commodity Specific Questions

Category Health

Purchase & Consumption Habits

Price Perceptions & Average Spend

Triggers/Barriers to Purchase

Preparation Preferences

+ 2 Ad hoc Questions per Month



Sample.

In total, 675 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 (Asian Vegetables, Baby Spinach, Brussels Sprouts & Capsicum) within the last month
- ⇒ Were the main or joint grocery buyer

	Total N=675	Asian Vegetables n=313	Baby Spinach n=300	Brussels Sprouts n=293	Capsicum n=313
Gender					
Male	41%	41%	37%	48%	41%
Female	59%	59%	63%	52%	59%
Age					
18-24 y.o.	5%	7%	6%	2%	6%
25-34 y.o.	17%	20%	23%	12%	19%
35-44 y.o.	17%	18%	19%	15%	18%
45-54 y.o.	18%	20%	17%	18%	19%
55-64 y.o.	22%	18%	20%	26%	21%
65+ y.o.	20%	16%	14%	27%	17%
Household					
Single Income no Kids	19%	15%	18%	21%	17%
Double Income no Kids	20%	23%	23%	19%	19%
Young Families	18%	20%	21%	13%	19%
Established Families	22%	23%	22%	21%	25%
Empty Nesters	21%	19%	17%	25%	19%
Location					
New South Wales	22%	21%	17%	26%	18%
Victoria	20%	21%	18%	24%	19%
South Australia	16%	16%	16%	16%	17%
Queensland	21%	21%	20%	23%	19%
Western Australia	13%	12%	18%	8%	16%
Tasmania	4%	3%	5%	1%	7%
Australian Capital Territory	5%	5%	6%	3%	4%
Northern Territory	1%	1%	1%	0%	1%



Trends Research: Our Approach

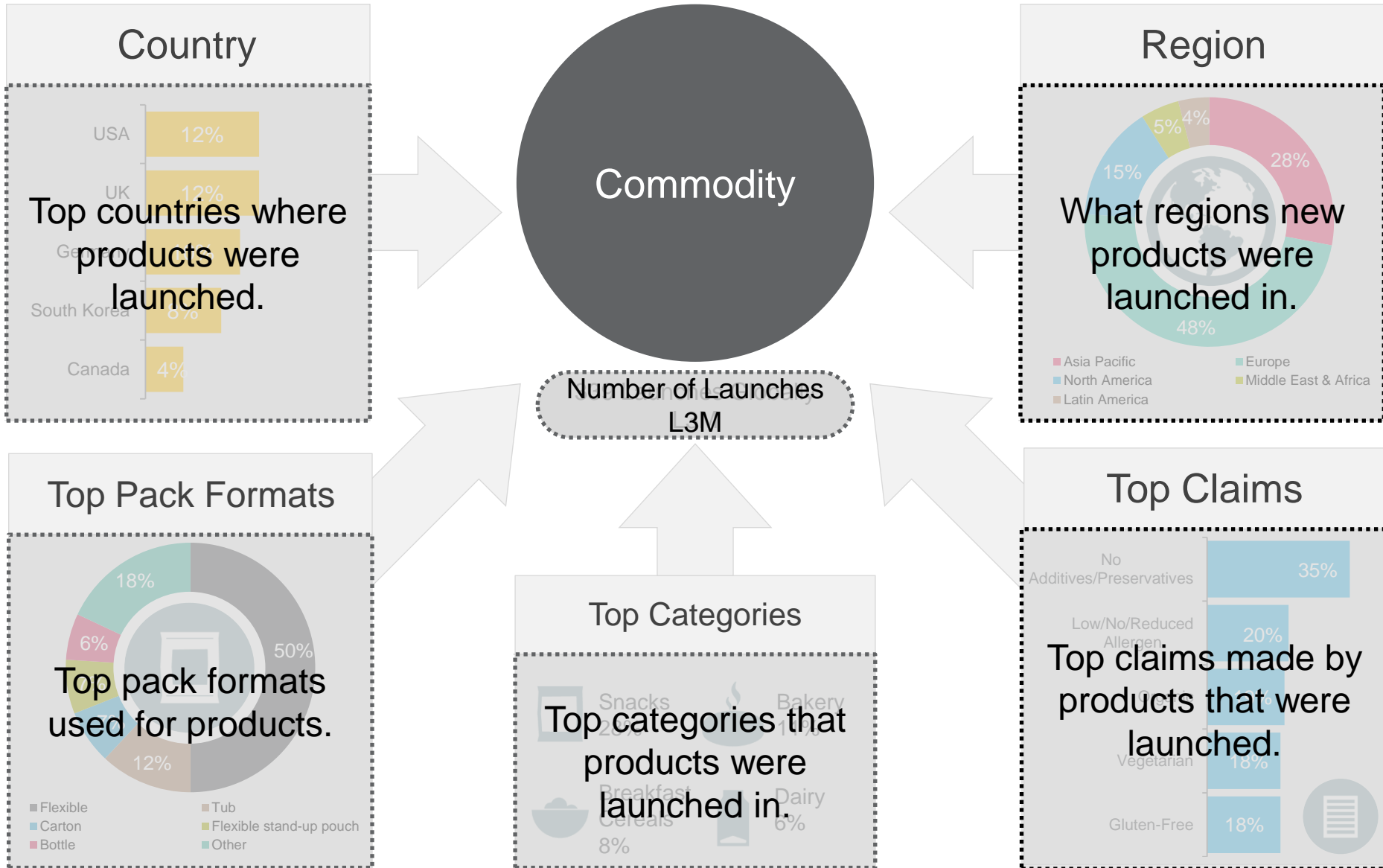


- ▶ Colmar Brunton has used a combination of both desk research and in the field market research to explore the trends of each vegetable commodity being tracked this month.
- ▶ Our main source of secondary data for this report was collected from Mintel Global New Products Database (GNPD).
- ▶ This data 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 8: Executive Summary

Asian Vegetable Grower Action Plan

23%

Consumers indicated a strong future purchase intent to buy more Asian Vegetables than they currently do.

1.

Insight:

A key barrier to purchase was limited availability of commodity.

Recommendation:

Due to the strong demand for Asian vegetables, currently and into the future, management of the retail supply chain is key to meeting demand and maintaining consumer satisfaction.

2.

Insight:

Lack of global innovation in Asian Vegetable category.

Recommendation:

To continue to grow market value in Australia, products that can be easily incorporated into consumers' diets should be developed.

3.

Insight:

Lower expected freshness compared with Wave 4 (September).

Recommendation:

Increase the quality and presentation of Asian vegetables on retail shelves to help improve consumers' freshness perceptions.

»»»→ Baby Spinach Grower Action Plan

38%

Short shelf life was the main barrier to purchase, and a significantly greater barrier compared with Wave 4 (September).

1.

Insight:

A decrease in perception of freshness compared to Wave 4 (September).

Recommendation:

Ensure that presentation of baby spinach on retail shelves is optimal to reduce consumer perceptions of decreased freshness in summer months.

2.

Insight:

The main purchase format was pre-prepared bags of Baby Spinach.

Recommendation:

Emphasis should be placed on providing convenient, yet fresh, pre-packaged options. Investigate other packaging that could provide longer shelf life and freshness (e.g. gas permeable bags).

3.

Insight:

Typically consumed raw for quick meals and weekday dinners.

Recommendation:

Promote other cuisines, cooking techniques and versatility of baby spinach, such as providing recipe ideas on the back of pre-packed bags.

»»»→ Brussels Sprouts Grower Action Plan

64%

The main trigger to purchase was health benefits of consuming Brussels Sprouts.

1.

Insight:

A considerable decrease in perceived value for money compared with Wave 4 (September).

Recommendation:

Promote health benefits of Brussels sprouts to justify value for money.

2.

Insight:

Significantly less purchased in summer months compared to winter.

Recommendation:

Communicate ways to prepare Brussels Sprouts in meals that are suitable for summer months.

3.

Insight:

Low level of consumer satisfaction, likely due to seasonality.

Recommendation:

Investigate other varieties of Brussels Sprouts that can be harvested in summer to provide fresh and consistent supply for greater period of the year.

»»»→ Capsicum Grower Action Plan

65%

The main trigger to purchase was to use as an ingredient in a meal.

1.

Insight:

A significant increase in limited availability compared with Wave 4 (September).

Recommendation:

Investigate whether warmer months lead solely to an issue of supply at retail, solely a greater demand at retail, or a combination of the two.

2.

Insight:

Typically consumed for weekday and weekend dinners.

Recommendation:

Promote alternative consumption occasions and cuisines, such as snacks and European cuisine to increase consumption occasions.

3.

Insight:

A significant decrease in value for money compared with Wave 4 (September).

Recommendation:

Perform a quality audit of capsicums sold through mainstream retail channels relative to other months in the year to determine if quality is maintained in produce supplied.



Wave 8: Fact Base

(1 of 2)

Asian Vegetables:

- ▶ Asian vegetables had relatively high levels of importance, endorsement and interest in new types. Future purchase intent is high compared to all commodities tracked thus far.
- ▶ Purchase of Asian vegetables occurred 5.1 times per month and was consumed on average 8.6 times per month.
- ▶ Overall, Asian vegetables were perceived to be good value for money. Consumers on average purchase 690g of Asian vegetables per shop, typically in the format of individual Asian vegetables. Average recalled last spend was \$5.58.
- ▶ Price tracking for September 2013 revealed that pricing varied by a dollar across states (excluding price promotions), with the average price for Pak Choy @ \$2.07 each.
- ▶ Buk Choy is the type of Asian vegetable with the highest spontaneous awareness, followed by Choy Sum, but 36% did not know any types of Asian vegetable.
- ▶ Asian vegetables were expected to stay fresh for 6 days, and freshness expectations were met most of the time.
- ▶ Top triggers for purchase were being easy to cook with, quick to cook with, being healthy and tasting great.

Baby Spinach:

- ▶ Baby spinach had relatively high levels of importance and endorsement amongst consumers. Future purchase intent is high compared to all commodities tracked thus far.
- ▶ Purchase of Baby spinach occurred 4.4 times per month and was consumed on average 9.3 times per month.
- ▶ Overall, Baby spinach was perceived to be fairly good value for money. Consumers on average purchase 440g of baby spinach, typically in the format of pre-packed small bags. Recalled last spend was \$3.80.
- ▶ Price tracking for September 2013 revealed that pricing was largely consistent across states and stores, with the average price being \$16.77 per kilo.
- ▶ 80% of respondents could not name any types of baby spinach.
- ▶ Baby spinach was expected to stay fresh for 6 days, which was usually met most of the time.
- ▶ Top triggers for purchase were the health/nutrition benefits, and being easy to cook with.



Wave 8: Fact Base

(2 of 2)

Brussels Sprouts:

- Brussels Sprouts had lower levels of importance and endorsement than other commodities tracked this month. Future purchase intent is on par with all commodities tracked thus far.
- Purchase of Brussels Sprouts occurred 3.2 times per month and was consumed on average 5.8 times per month.
- Overall, Brussels Sprouts were perceived to be fairly good value for money. Consumers on average purchase 610g of Brussels sprouts, typically in the format of individual sprouts. Recalled last spend was \$3.61.
- Price tracking for September 2013 revealed that pricing varied across states and stores, with the average price being \$9.43 per kilo and the price range being \$7.98.
- 84% of respondents could not name any types of Brussels Sprouts.
- Brussels Sprouts were expected to stay fresh for 8 days, which was met most or all of the time.
- Top triggers for purchase were health and nutrition benefits, enjoying the taste and adding to the variety of vegetables to cook with.

Capsicum:

- Capsicums had relatively high levels of importance and endorsement. Future purchase intent is higher than other commodities tracked thus far.
- Purchase of capsicums occurred 4.4 times per month and was consumed on average 10.3 times per month.
- Overall, capsicums were perceived to be fairly good value for money. Consumers on average purchase 680g of capsicums, typically in the format of individual capsicums. The average recalled last spend was \$3.89.
- Price tracking for September 2013 revealed that pricing varied across states and stores, with the average price of a green capsicum being \$4.75 per kilo and the price range being \$4.00.
- 50% of respondents named red capsicums and green capsicums as types that they were aware of, but 44% of respondents could not name any types of capsicum.
- Capsicums were expected to stay fresh for 8 days, which was met most of the time.
- Top triggers for purchase were their flavour and colour, as well as being easy to use as an ingredient in dishes.



Wave 8: Ad-Hoc Questions



Additional Monthly Questions Asked

Average consumption of vegetables

5 Serves of
Vegetables
recommended a day

- ➔ The mean consumption of vegetable serves was well below the recommended average for both adults and children. In both instances the amount consumed was nearly half of what is recommended.
- ➔ It is recommended that the vegetable industry investigate an effective way of raising awareness of the recommended vegetable intake in order to promote a healthier society, that will in turn drive vegetable sales.



On average respondents consumed **2.5 serves** of vegetables per day



Of those who had children, their kid(s) consumed **2.4 serves** of vegetables per day

AHQ1 On average, how many serves of vegetables do you consume per day? N=675

AHQ2. On average, how many serves of vegetables do your children consume per day? N=282

*Adults are recommended to consume 5-6 serves of vegetables per day, *Children recommended servings 2-5 per day.*

Serving sizes and recommended intake as per eatforhealth.gov.au



Wave 8: Overall Vegetable Tracking



Vegetables Purchased Last Month



- Overall, the purchase of vegetables had decreased compared with previous waves correlating with warmer weather.
- In this wave, the most frequently purchased vegetables were tomatoes, carrots, potatoes and lettuce, which was consistent with purchase behaviour in December (Wave 7).

■ Wave 1: June
 ■ Wave 2: July
 ■ Wave 3: August 2013
 ■ Wave 4: September 2013
■ Wave 5: October 2013
 ■ Wave 6: November 2016
 ■ Wave 7: December 2013
 ■ Wave 8: January 2014

Sample Wave 8 N=3156
 S8. Which of the following fresh vegetables have you purchased in the last month?



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

- ▶ All commodities tracked this month had relatively high levels of importance to consumers and endorsement to their friends and family, especially Asian Vegetables.
- ▶ Asian Vegetables and Baby Spinach had strong future purchase intent, with over a fifth of respondents indicating they would purchase more than they currently do. This figure highlights the demand for the vegetables, but also potential to grow market value.
- ▶ Consumer satisfaction of Brussels Sprouts was well below the Harvest Mean, indicating a strong dissatisfaction of the commodity which has increased since Wave 4 in September (6.5/10). This is likely related to the seasonality of Brussels Sprouts (peak season falling in Winter months).

	Asian Vegetables	Baby Spinach	Brussels Sprouts	Capsicum	Harvest Total Mean
Importance	7.3	6.9	6.5	7.0	6.4
Satisfaction	6.2	6.4	6.0	6.7	6.6
Endorsement	7.5	7.2	6.8	7.2	6.8
Interest (New Types)	7.2	6.2	6.2	6.5	6.2
Future Purchase					
More	23%	20%	15%	11%	13%
Same	77%	79%	84%	87%	85%
Less	0%	1%	2%	2%	2%

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



Asian
Vegetables.

Purchase and Consumption Behaviour

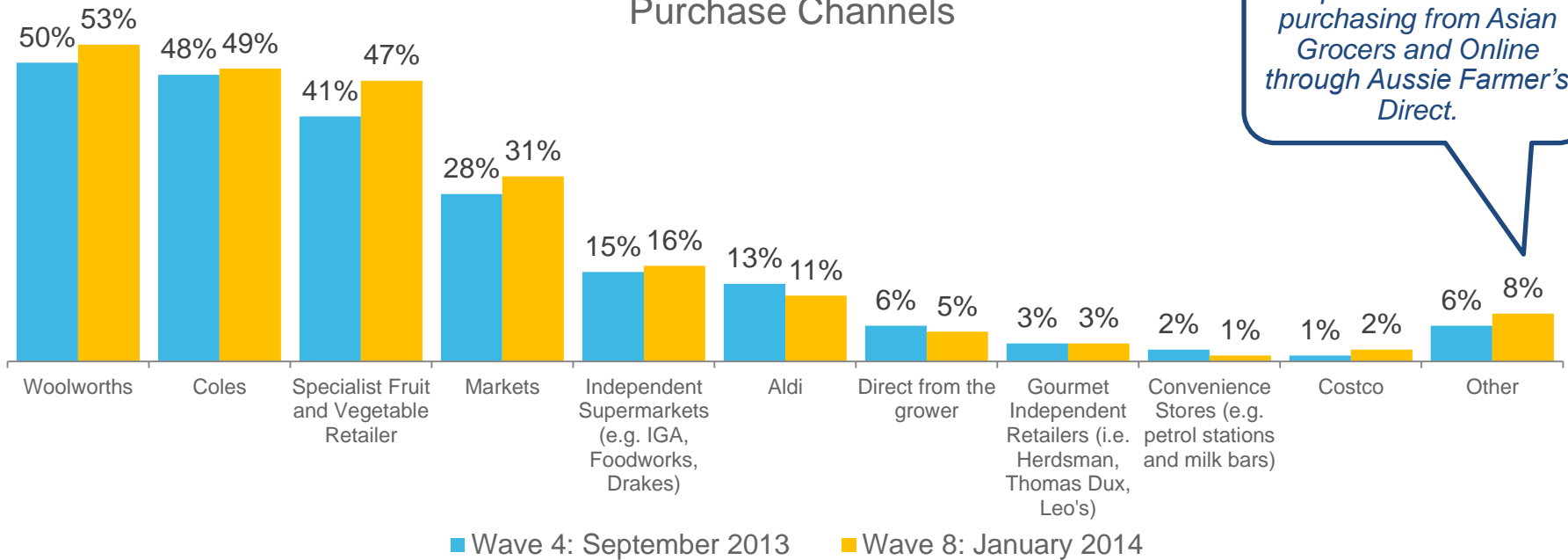
Asian Vegetables

Average Purchase
4.8 times per month
(cf. 5.1 per month, Wave 4)

Average Consumption
8.8 times per month
(cf. 8.6 per month, Wave 4)

- ⇒ Purchase and consumption occasions were consistent with Wave 4. On average, respondents consumed Asian Vegetables twice a week.
- ⇒ The most common purchase channels were the main supermarkets (Woolworths & Coles) and specialist retailers. Respondents were also purchasing from online channels and Asian grocers.

Purchase Channels



Respondents were also purchasing from Asian Grocers and Online through Aussie Farmer's Direct.

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 4, N=421 & Wave 8, N=313

⇒ Average Spend & Price Sensitivity

Asian Vegetables



⇒ The average consumer typically purchased **900g** of Asian vegetables, consistent with Wave 4.



⇒ The average recalled last spend had increased slightly, up from \$5.58 to **\$5.70**.

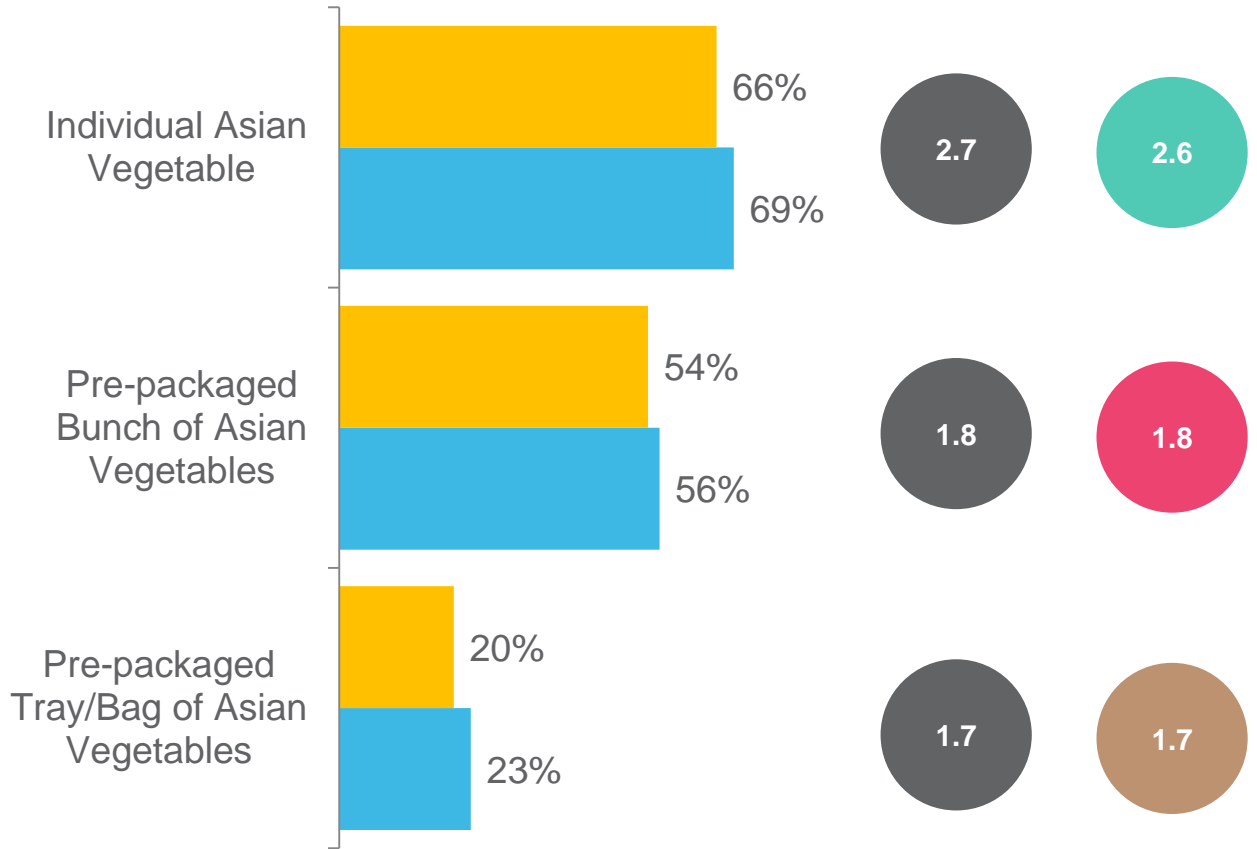


⇒ On average, consumers perceived Asian vegetables to be good value (**6.6/10**), which was on trend with Wave 4 (6.7/10).

⇒⇒⇒ Pack Formats Purchased

Asian Vegetables

Amount Purchased if Selected (mean)
Wave 4 Wave 8



⇒⇒ Purchase of Asian vegetables was on trend with Wave 4, with individual formats the most frequently purchased.

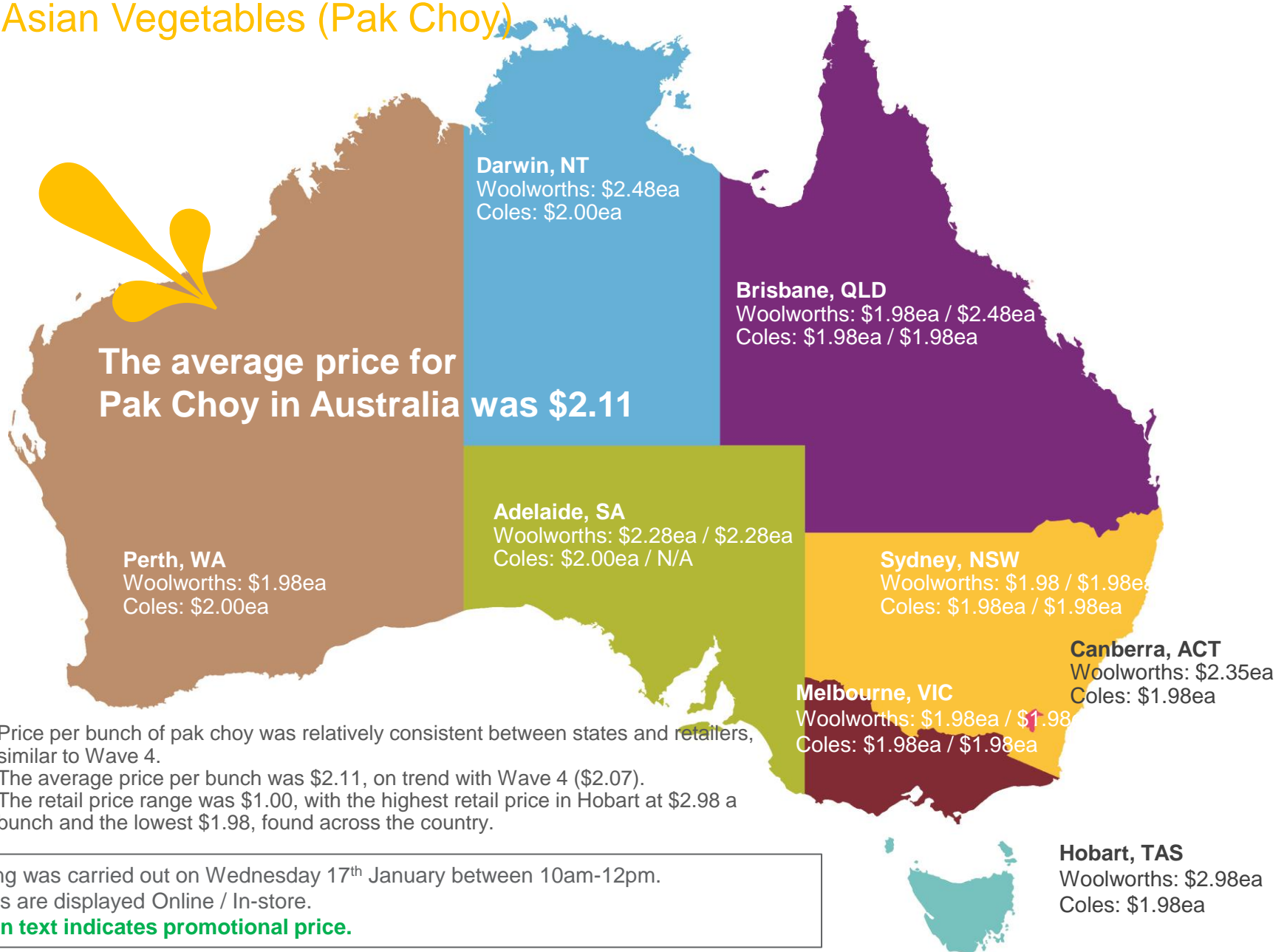
⇒⇒ Pre-packaged formats were also commonly purchased, with 2 bunches being purchased on average per shop.

■ Wave 8: January 2014 ■ Wave 4: September 2013

Sample Wave 4, N=421 & Wave 8, N=313
Q3a. How much <commodity> does this typically equate to?

Online and In-store Commodity Prices

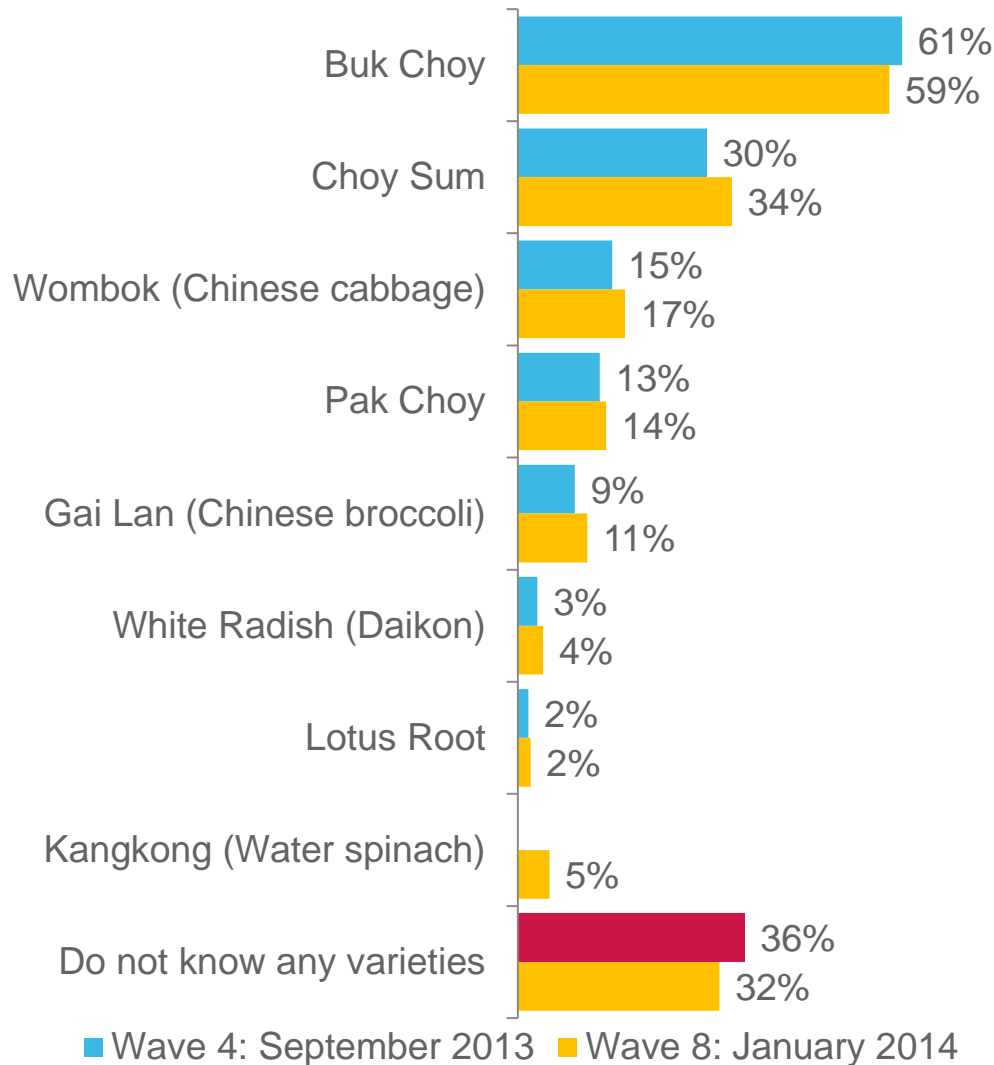
Asian Vegetables (Pak Choy)



Spontaneous Awareness & Purchase

Asian vegetables

- ▶ Recall of Asian Vegetable types was relatively consistent with that in Wave 4.
- ▶ Over a third of respondents were unable to recall a specific variety.
- ▶ Buk Choy had the highest recall followed by Choy Sum and Wombok.
- ▶ There was a mixture of names used to identify types of Asian vegetables, such as Wombok and Chinese Cabbage.

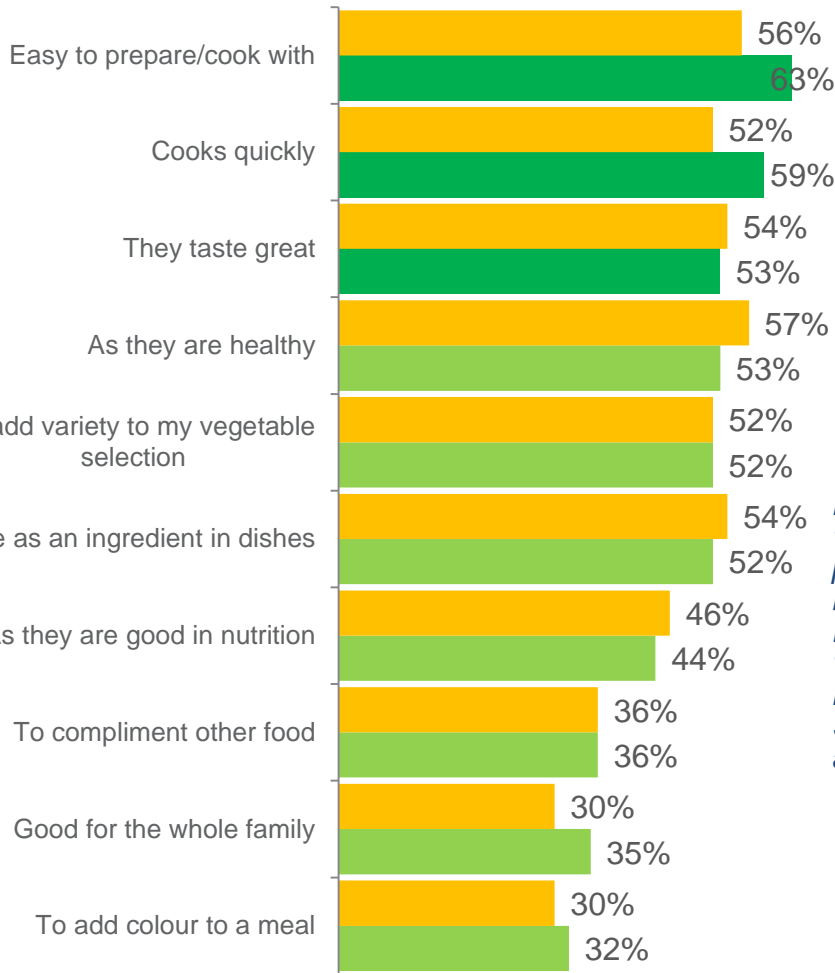




Triggers & Barriers to Purchase

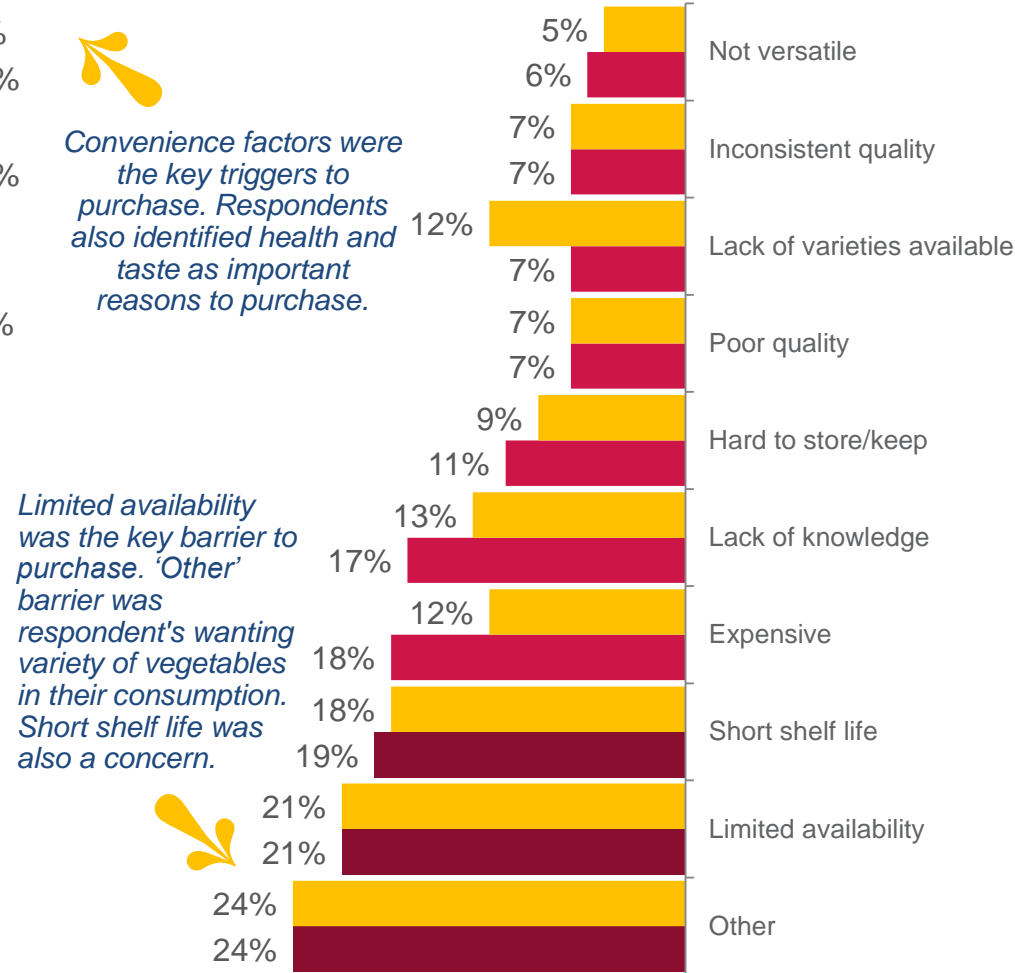
Asian Vegetables

Triggers



■ Wave 8: January 2014 ■ Wave 4: September 2013

Barriers



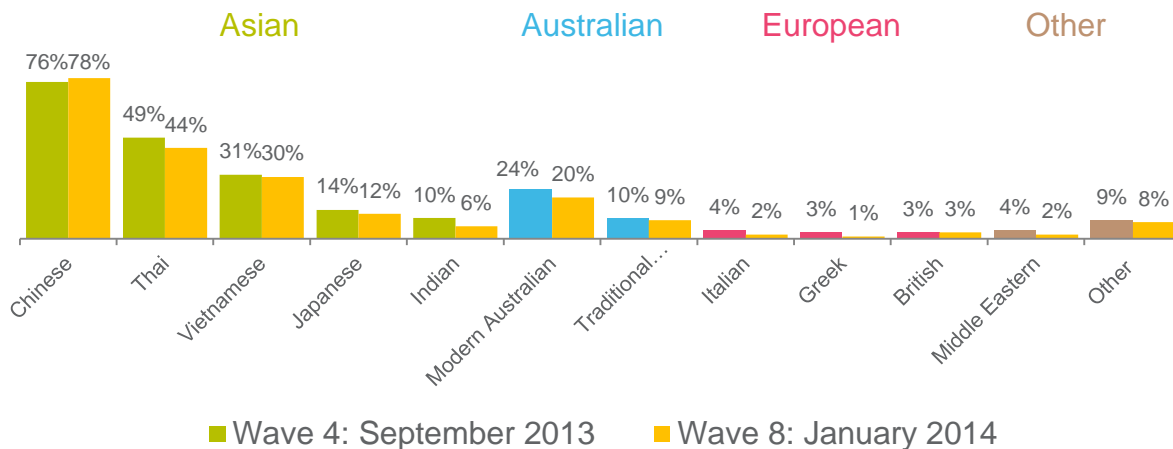
■ Wave 8: January 2014 ■ Wave 4: September 2013

Sample Wave 4, N=421 & Wave 8, N=313
 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?

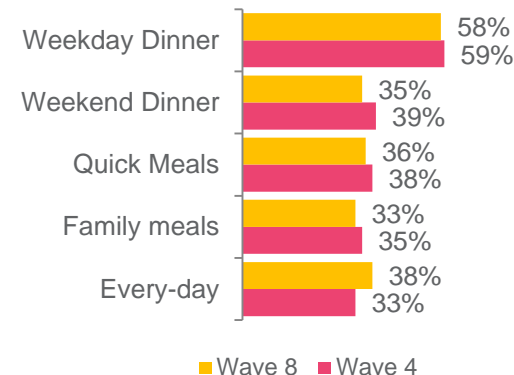
Cooking Preferences & Occasions: Asian Vegetables

- ⇒ Asian was the predominant cuisine cooked, particularly Chinese and Thai.
- ⇒ Asian vegetables were most commonly stir-fried or steamed with carrots, capsicums and white onion.
- ⇒ Dinners (weekend and weekday) were the main meal occasion, which was consistent with Wave 4.

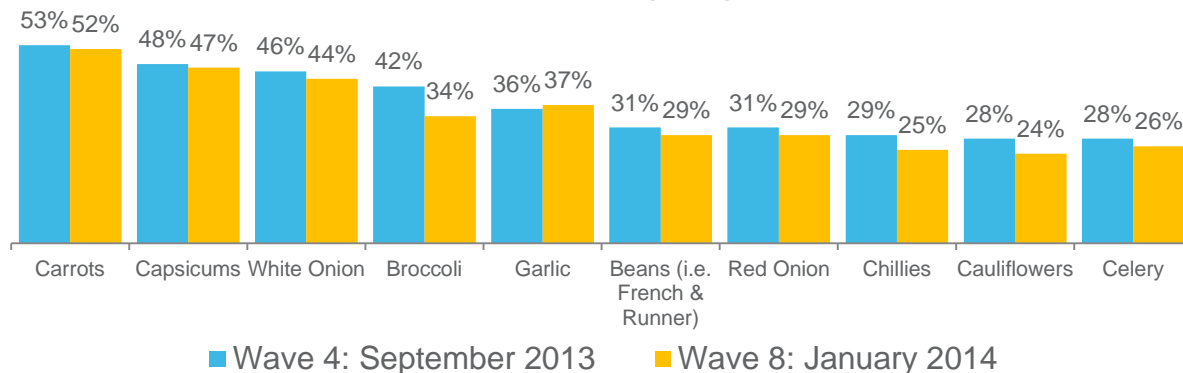
Typical Cuisine Cooked



Top 5 Consumption Occasions



Top 10 Accompanying Vegetables

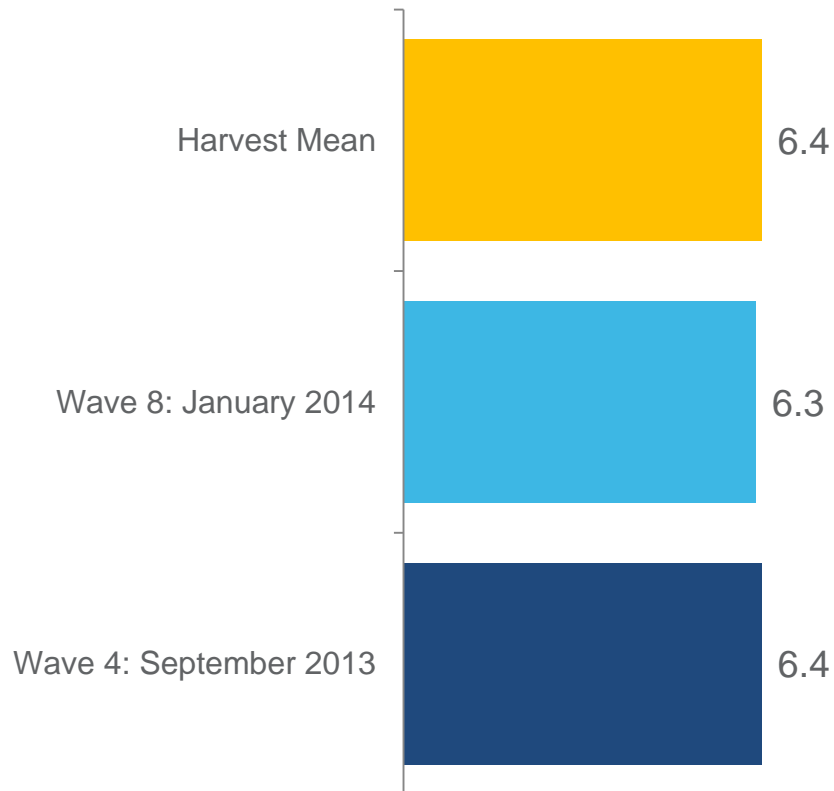


Top 10 Cooking Styles		
	Wave 4	Wave 8
Stir frying	77%	83%
Steaming	44%	42%
Soup	22%	20%
Boiling	19%	12%
Sautéing	19%	17%
Raw	11%	8%
Microwave	11%	10%
Shallow Frying	11%	12%
Blanche	11%	10%
Stewing	7%	7%

Sample Wave 4, N=421 & Wave 8, N=313
 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>?

⇒ Importance of Provenance

- ⇒ The provenance of Asian Vegetables is important to Australian consumers – consistent with that measured in Wave 4 and the Harvest mean for all vegetables evaluated.



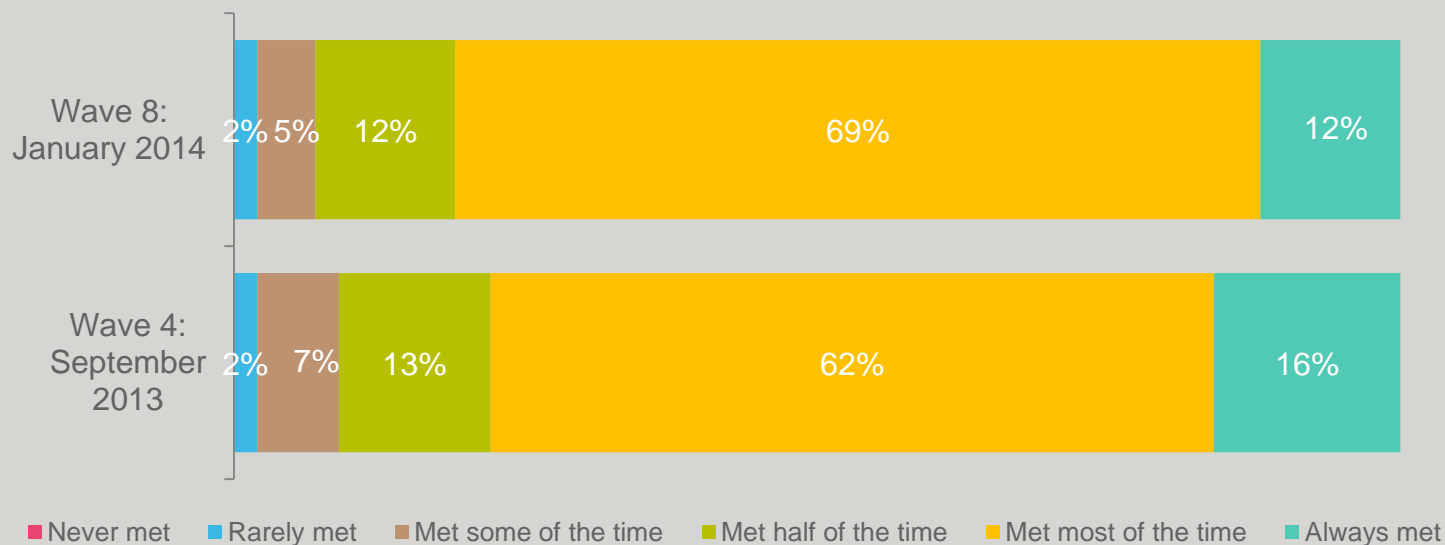
In Wave 3 consumers ranked “Australian Grown” as the most important factor in relation to provenance

⇒ Freshness and Longevity

Expected to stay fresh for **5.5 days**
(cf. 5.9 days Wave 4)

- ⇒ Asian vegetables were expected to remain fresh for just over 5 days once purchased.
- ⇒ Meeting expectations of freshness were on par from wave to wave, with more variability during the warmer months.

Expectations Met



Sample Wave 4, N=421 & Wave 8, N=313

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: Asian Vegetables

Asian Vegetables Global NPDs

November 2013 – January 2014

There were 51 products launched globally within the last three months that contained Asian vegetables. The majority launched were in Asia Pacific and Europe, particularly Germany. Popular categories for launch were soups and meals.





Asian Vegetables Product Launches: Last 3 Months (November 2013- January 2014) Summary

- 51 products containing Asian Vegetables as an ingredient were launched globally. Domestically, there were four soup products launched.
- Asia Pacific, Europe and North America were the top regions of Asian Vegetable launches: 47%, 27% and 16% respectively.
- Flexible formats including sachets were the most used packaging for launches.
- The top category launches were sauces (31%), meals (20%) and bakery goods (14%).
- Popular claims used were around convenience, including ease of use, microwaveable and time/speed. No additives/preservatives was also a popular claim.
- The most innovative Asian Vegetable product was the Dole Chopped Asian Vegetable Salad Blend - USA (example can be found in the following pages).



Source: Mintel (2014)

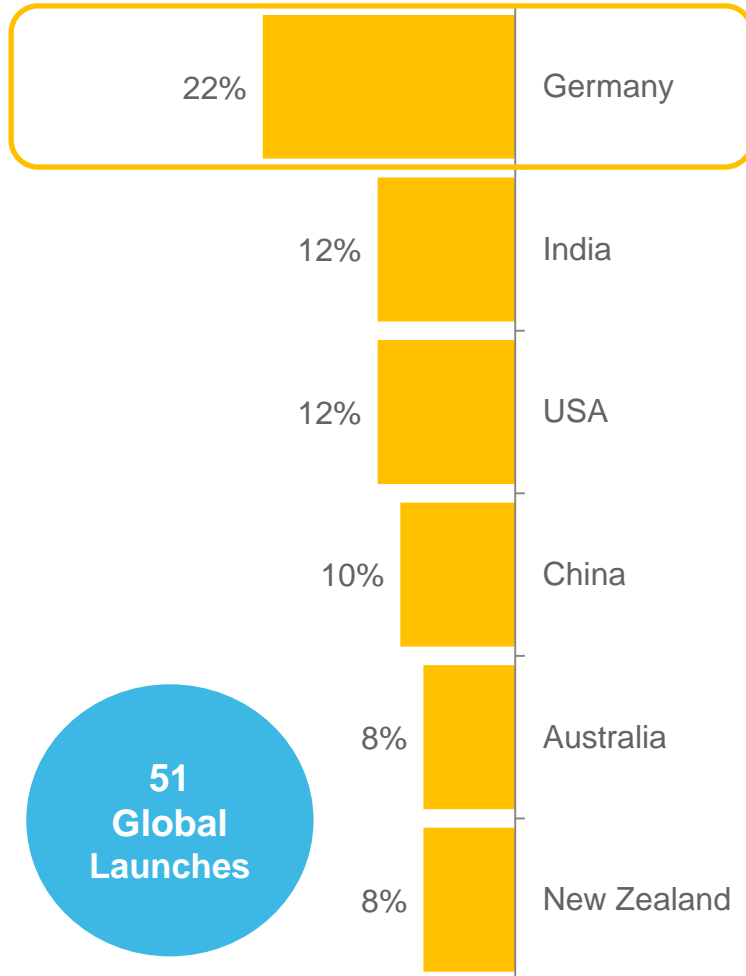
Asian Vegetables Launches

Country & Categories

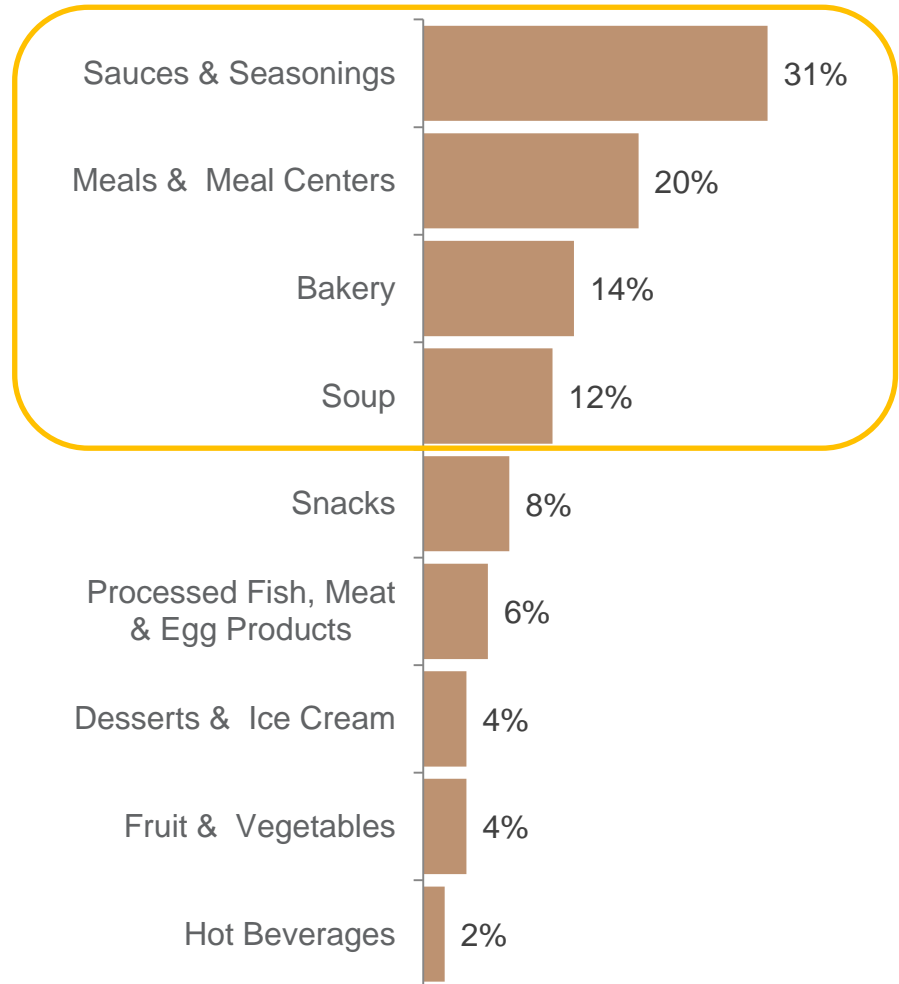
⇒ Over one fifth of Asian Vegetable launches occurred in Germany. There were also multiple launches in India and USA.

⇒ Top launch categories for products containing Asian vegetables were sauces, meals, bakery goods and soups.

Top Launch Countries



Top Launch Categories

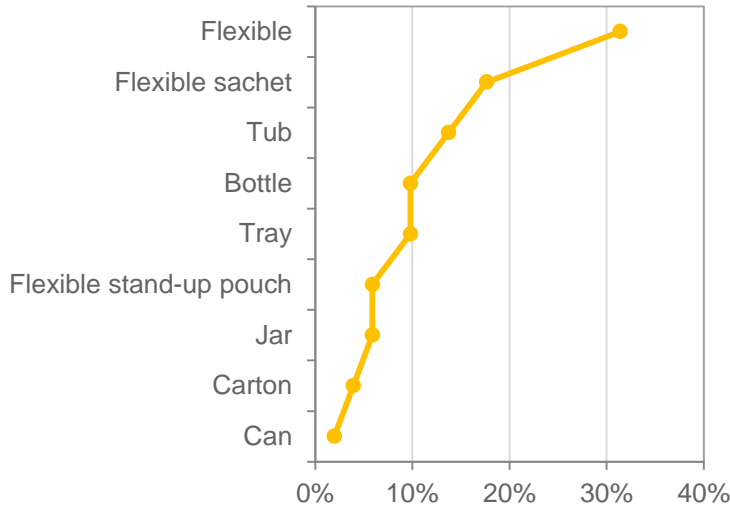


Asian Vegetables Launches

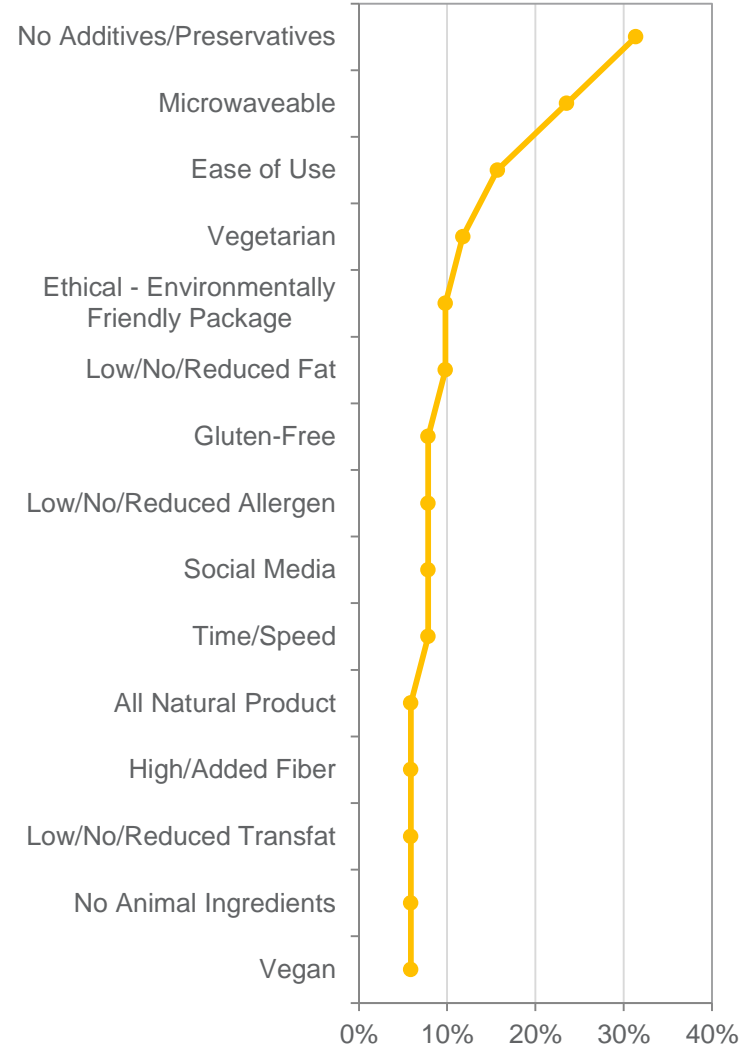
Top Claims & Pack Formats Used

- ▶ Flexible packaging remained the most common format used for products containing Asian vegetables.
- ▶ Health and convenience claims were most commonly used on products over the last three months.

Top Packs Launched



Top Claims Launched



—● Global (n=51)



Innovative Asian Vegetables Launches: L3M (November 2013 – January 2014)

Asia Spezialitäten Asia-Box To Go Pork Chop Suey (Germany)

Asia Spezialitäten Asia-Box To Go Schweinefleisch Chop Suey (Pork Chop Suey) is suitable for microwave heating. The spicy product contains Asian vegetables, soy sauce, honey and ginger as well as mie noodles. It retails in a 400g pack.



Claims:
On-the-Go, Microwaveable

Blue Dragon Spicy Szechuan Stir Fry Sauce (New Zealand)

Blue Dragon Spicy Szechuan Stir Fry Sauce is an intense combination of red chillies, rice vinegar and light soy sauce. This sauce gets ready in 10 minutes, and is free from artificial colours, flavours and preservatives. The vegetarian product helps consumers to easily recreate authentic Asian dishes at home, and retails in a 140g pack.



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

Eating Right Miso Noodle Soup (Colombia)

Eating Right Sopa de Miso con Fideos (Miso Noodle Soup) is a flavorful Japanese style miso soup with Asian noodles, seaweed, tofu and green onions. This product is low in fat, can be enjoyed as a meal or as a quick snack, and is suitable for the microwave. The product retails in a 37g pack.



Claims:
Low/No/Reduced Fat, Time/Speed, Microwaveable

Frosta Asia Curry Vegetable Stir Fry (Germany)

Frosta Gemüse Pfanne Asia Curry (Asia Curry Vegetable Stir Fry) is now available in the range. This seasoned Asian-style vegetable mix is refined with curry and coconut milk and is 100% free from artificial colours or flavourings, added flavour enhancers, emulsifiers, stabilisers.



Claims:
No Additives/Preservatives, GMO-Free, Social Media, Microwaveable, Low/No/Reduced Transfat, Vegetarian



Innovative Asian Vegetables Launches: L3M (November 2013 – January 2014)

The Chef In Black California Asian Fusion Dressing & Marinade (USA)

The Chef In Black California Asian Fusion Dressing & Marinade has been reformulated with a new and improved flavor. The all natural dressing is free from gluten, and retails in a 12-oz. pack featuring serving suggestions.



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

Fresh Express Chopped Asian Salad Kit (USA)

Fresh Express Chopped Asian Salad Kit comprises savoy cabbage, crisp green cabbage, sweet carrots and crunchy celery with a sesame orange dressing, wonton strips and toasted sliced almonds. The product is thoroughly washed, ready to eat and retails in a 9.1-oz. Keep-Crisp pack.



Claims:
Ease of Use, Convenient Packaging

JYM Mi Fan Da Dang Jia Chang Pickled Vegetables (China)

JYM Mi Fan Da Dang Jia Chang Jiang Cai (Jia Chang Pickled Vegetables) can be enjoyed with fried rice, noodles or Asian style salads. This product is said to be delicious and retails in a 260g pack.



Claims:
N/A

Sum-m! Asian Appetizer Pack (Canada)

Sum-m! Asian Appetizer Pack comes fully cooked and contains no trans fat or added MSG. The product comprises 10 units of each of the following varieties: crispy mini Thai chicken spring rolls; crispy sesame ginger chicken wontons; crisp mini pork egg rolls; and pork gyoza dumplings.



Claims:
No Additives/Preservatives,
Low/No/Reduced Transfat, Ethical -
Environmentally Friendly Package



Innovative Asian Vegetables Launches: L3M (November 2013 – January 2014)

Dole Chopped Asian Blend (USA)

Dole Chopped Asian Blend is an all natural and preservative free mixed vegetable pack. It contains green cabbage, red cabbage, broccoli slaw, carrots, kale and snap peas. The product is thoroughly washed and retails in a 12-oz. pack, bearing a Facebook logo.



Claims:
No Additives/Preservatives, All Natural Product, Social Media

Ottogi Yeul Ramen Instant Noodles (Vietnam)

Ottogi Mi Yeul Ramen (Yeul Ramen Instant Noodles) are new to the range. The products features Asian style with hot taste, and retails in a 120g pack.



Claims:
N/A

Xiangchu / Xiang Chu Chicken Bouillon for Asian Style Salad (China)

Oenobiol Activateur Minceur Aide À Perdre du Poids (Slimness Activator Supplement) is claimed to target extra-kilograms, and therefore to help lose weight in the limits of a controlled calorie intake. For that purpose, it's claimed to provide glucomannan from konjac of vegetable origin. This active ingredient is claimed have been scientifically tested.



Claims:
High Protein, Low/No/Reduced Fat, Ethical - Animal

Chung's Pork Egg Rolls (USA)

Chung's Pork Egg Rolls have been relaunched. Claimed to make authentic Asian cuisine easy, this microwaveable food on the go is free from trans fat and MSG and retails in a 12-oz. pack containing four units and Chung's Famous sweet and sour sauce packets.



Claims:
Ease of Use, No Additives/Preservatives, Low/No/Reduced Transfat, On-the-Go, Microwaveable



Australian Asian Vegetables Launches: L3M (November 2013 – January 2014)

Asia Specialities Red Curry Microwave Soup

Asia Specialities Red Curry Microwave Soup is an authentic mild Asian curry soup with vegetables. It is an excellent source of fibre and provides two serves of vegetables per bowl. The product is suitable for vegetarians and vegans, and contains no artificial colours or flavours, preservatives or gluten. It retails in a 420g pack.



Claims:

No Additives/Preservatives, Low/No/Reduced Allergen, High/Added Fiber, Vegan, Microwaveable, Gluten-Free, No Animal Ingredients, Vegetarian

Asia Specialities Yellow Curry Microwave Soup

Asia Specialities Yellow Curry Microwave Soup is an authentic mild Asian curry soup with vegetables. It is an excellent source of fibre; provides 3.1 serves of vegetables per bowl; contains no artificial colours or flavours, no preservatives; is a source of protein; and is suitable for vegetarians and vegans. It retails in a 420g pack.

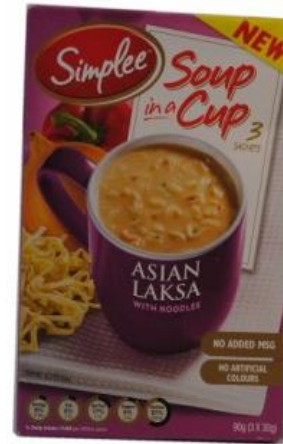


Claims:

No Additives/Preservatives, Low/No/Reduced Allergen, High/Added Fiber, Vegan, Microwaveable, Gluten-Free, No Animal Ingredients, Vegetarian

Simplee Soup in a Cup Asian Laksa with Noodles Soup

Simplee Soup in a Cup Asian Laksa with Noodles Soup contains no added MSG, artificial colours or preservatives and provides a source of fibre. This easy-to-prepare product is suitable for vegetarians, only requires water and is said to be a satisfying snack anytime of the day. It retails in a 90g pack with three 30g sachets.



Claims:

No Additives/Preservatives, High/Added Fiber, Low/No/Reduced Fat, Time/Speed, Ease of Use, Vegetarian

Asia Specialities Green Curry Microwave Soup

Asia Specialities Green Curry Microwave Soup is an authentic mild Asian curry soup with vegetables. It is an excellent source of fibre and provides 2.6 serves of vegetables per bowl. The product is suitable for vegans and vegetarians, and contains no artificial colours or flavours, preservatives or gluten. It retails in a 420g pack.



Claims:

No Additives/Preservatives, Low/No/Reduced Allergen, High/Added Fiber, Vegan, Microwaveable, Gluten-Free, No Animal Ingredients, Vegetarian

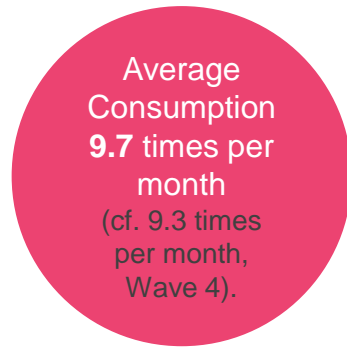
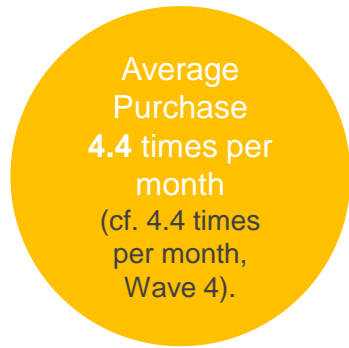
A close-up photograph of fresh baby spinach leaves, which are small, rounded, and bright green. The leaves are densely packed and cover the entire background of the slide. A large, dark gray circle is superimposed over the center of the image, containing the text.

Baby
Spinach.



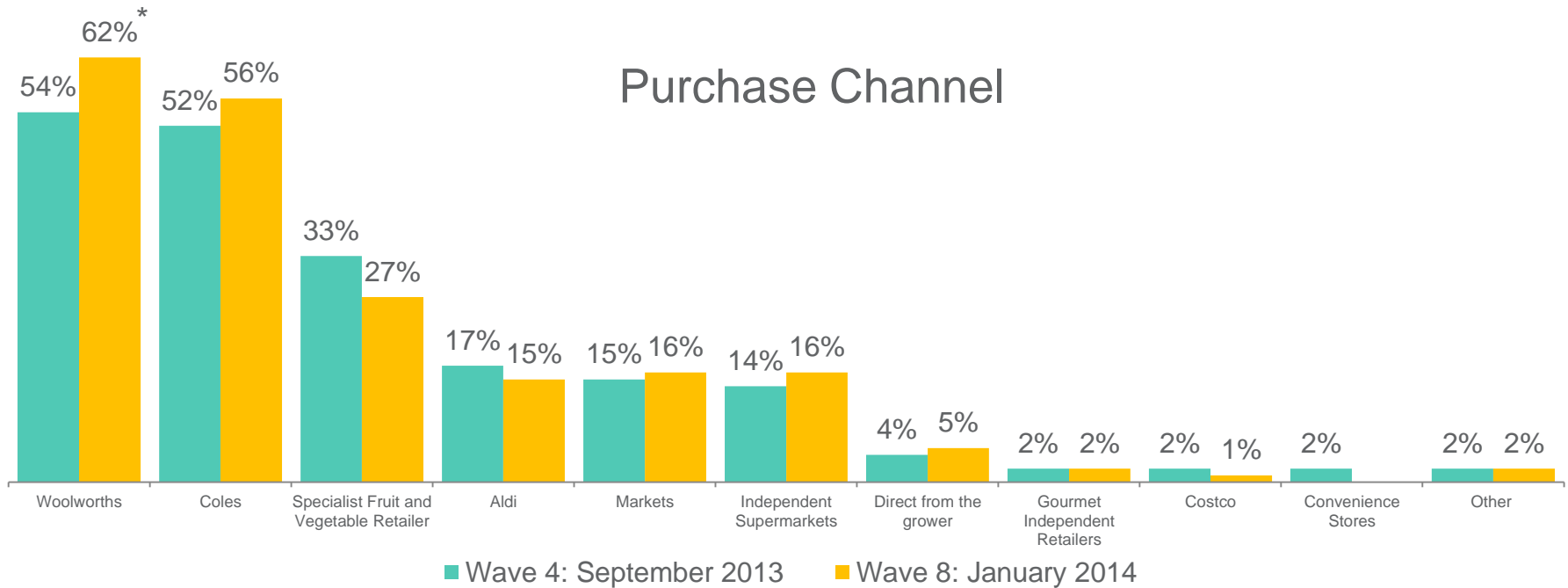
Purchase and Consumption Behaviour

Baby Spinach



- ▶ Purchase and consumption frequency was on trend with Wave 4, with consumption over twice a week.
- ▶ Purchase was significantly higher through Woolworths this month – there was an overall trend in increased purchase from mainstream retail channels.

Purchase Channel



Q1. On average, how often do you purchase <commodity>?
 Q2. On average, how often do you consume <commodity>?
 Q5. From which of the following channels do you typically purchase <commodity>?
 Sample Wave 4, N=501 and Wave 8, N=300

➤➤➤ Average Spend & Price Sensitivity

Baby Spinach



⇒ The average consumer typically purchased **400g** of Baby spinach in a single purchase, consistent with Wave 4.



⇒ The average recalled last spend on Baby spinach was **\$3.60**, down 20c from Wave 4 (\$3.80).



⇒ Consumers perceived the average price for Baby spinach as fairly good value for money (**6.0/10**), consistent with Wave 4 (6.1/10).

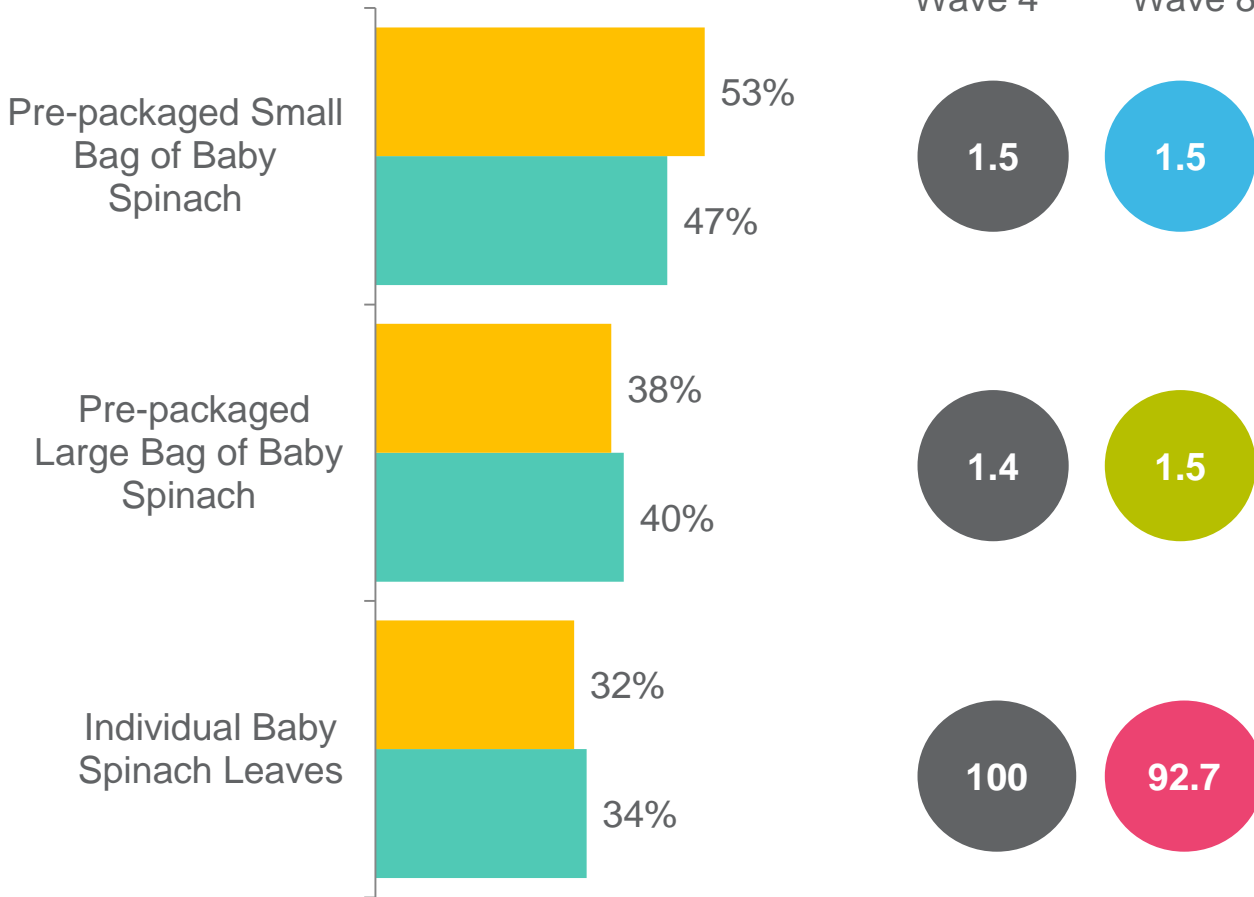
➤➤➤ Pack Formats Purchased

Baby Spinach

Popularity of bagged formats may be due to convenience factors, as they are ready to go and in some instances, pre-washed.



Amount Purchased if Selected (mean)
Wave 4 Wave 8

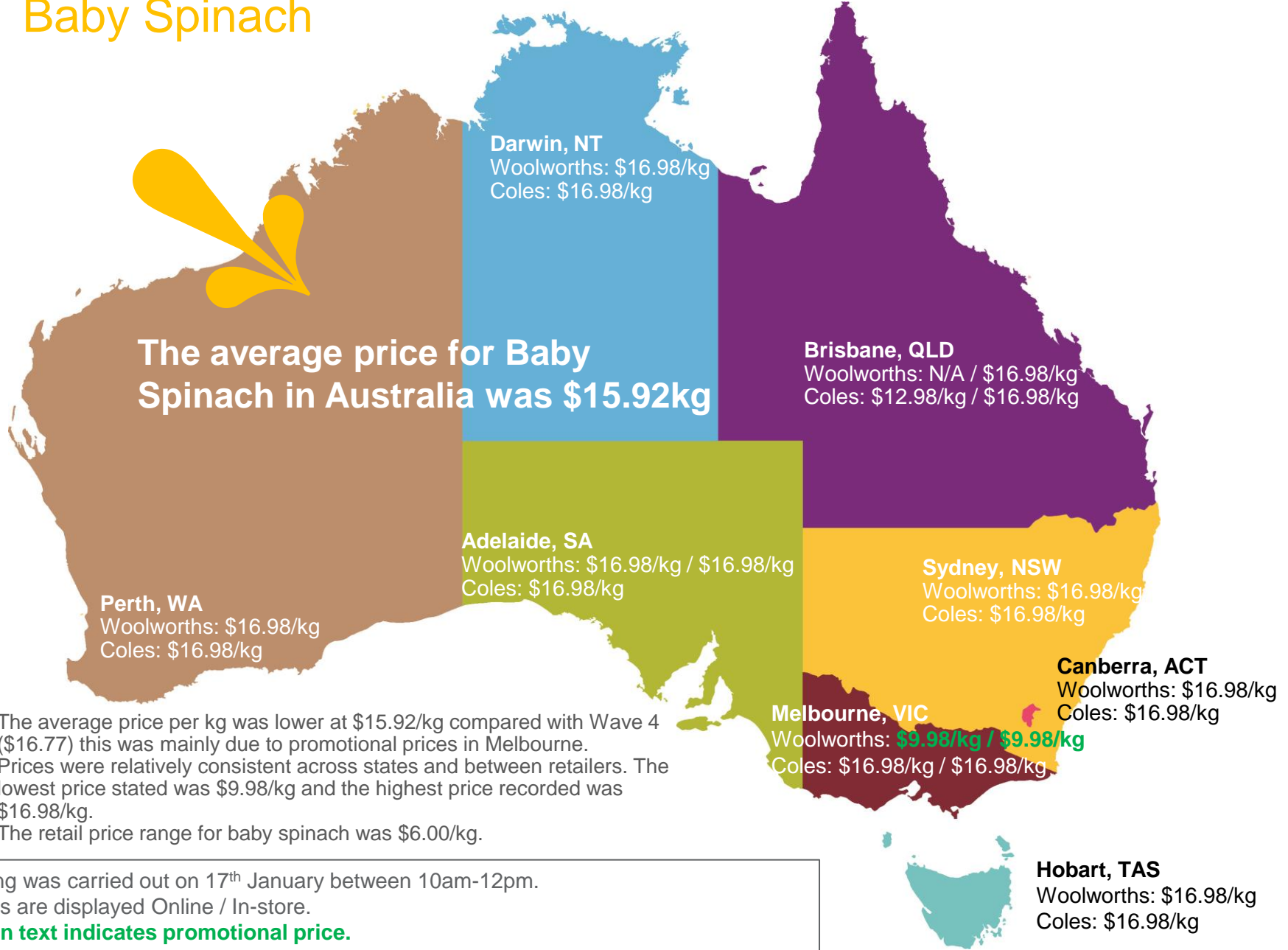


- Purchase formats were consistent with Wave 4, with consumers typically purchasing small and large bags of Baby spinach, usually 1-2 bags per shop.
- Approximately one third of consumers purchase loose leaf baby spinach

■ Wave 8: January 2014 ■ Wave 4: September 2013

Online and In-store Commodity Prices

Baby Spinach



- The average price per kg was lower at \$15.92/kg compared with Wave 4 (\$16.77) this was mainly due to promotional prices in Melbourne.
- Prices were relatively consistent across states and between retailers. The lowest price stated was \$9.98/kg and the highest price recorded was \$16.98/kg.
- The retail price range for baby spinach was \$6.00/kg.

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

Spontaneous Awareness & Purchase

Baby Spinach

- ▶ Over 80% of respondents could not name any types of baby spinach.
- ▶ Of those that mentioned a type, 5% said “English baby spinach”, whilst others mentioned retail brand names.



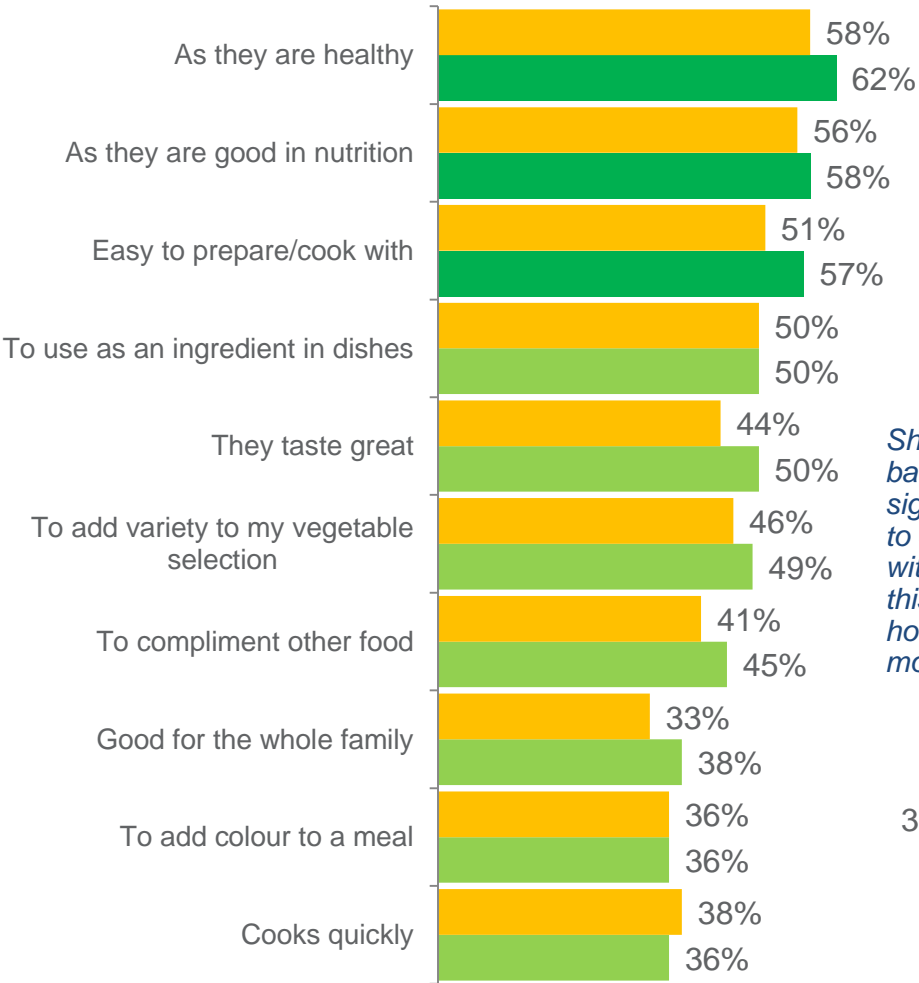
“I always purchase pre-packaged and I don't think there is any information on the package regarding the type of baby spinach it is.”



Triggers & Barriers to Purchase

Baby Spinach

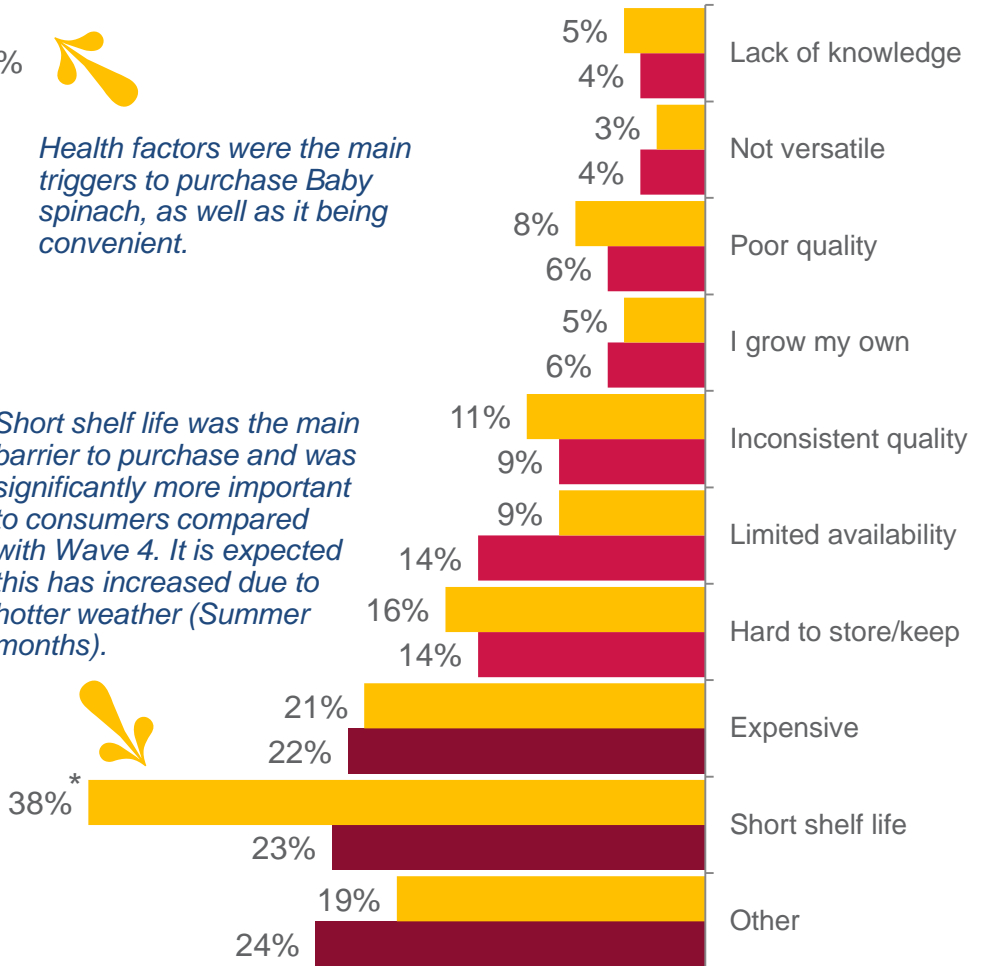
Triggers



Health factors were the main triggers to purchase Baby spinach, as well as it being convenient.

Short shelf life was the main barrier to purchase and was significantly more important to consumers compared with Wave 4. It is expected this has increased due to hotter weather (Summer months).

Barriers



■ Wave 8: January 2014 ■ Wave 4: September 2013

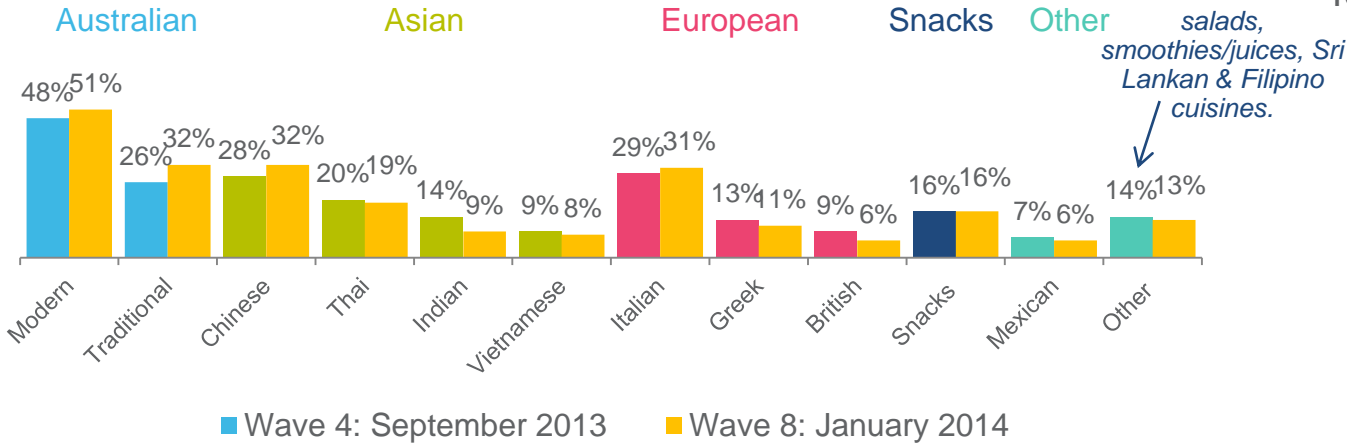
■ Wave 8: January 2014 ■ Wave 4: September 2013

Sample Wave 4, N=501 and Wave 8, N=300
 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?

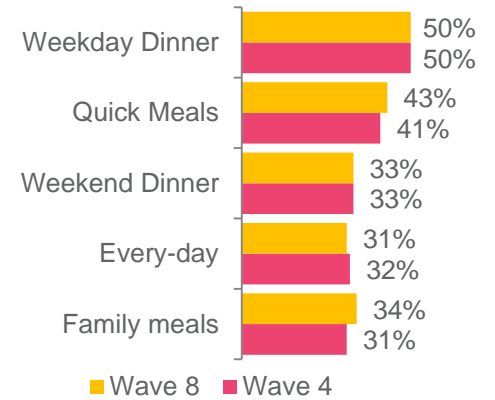
Cooking Preferences & Occasions: Baby Spinach

- ⇒ Baby spinach was most commonly used in raw and in stir-fry dishes. It is typically accompanied with tomatoes, carrots and capsicums.
- ⇒ Australian (modern and traditional) cuisine was the most cooked cuisine for baby spinach and it mainly consumed for weekday dinners and quick meals, consistent with Wave 4.

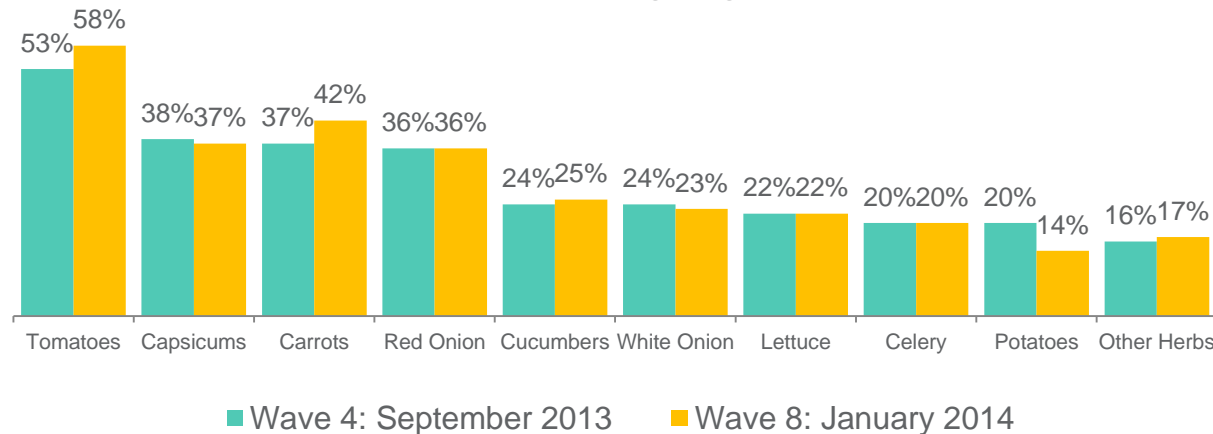
Typical Cuisine Cooked



Top 5 Consumption Occasions



Top 10 Accompanying Vegetables



Top 10 Cooking Styles

	Wave 4	Wave 8
Raw	54%	58%
Stir frying	39%	43%
Steaming	29%	23%
Sautéing	15%	16%
Soup	12%	10%
Boiling	11%	15%
Blanche	11%	7%
Microwave	8%	10%
Baking	6%	6%
Stewing	5%	5%

Sample Wave 4, N=501 and Wave 8, N=300

Q9. How do you typically cook <commodity> ?

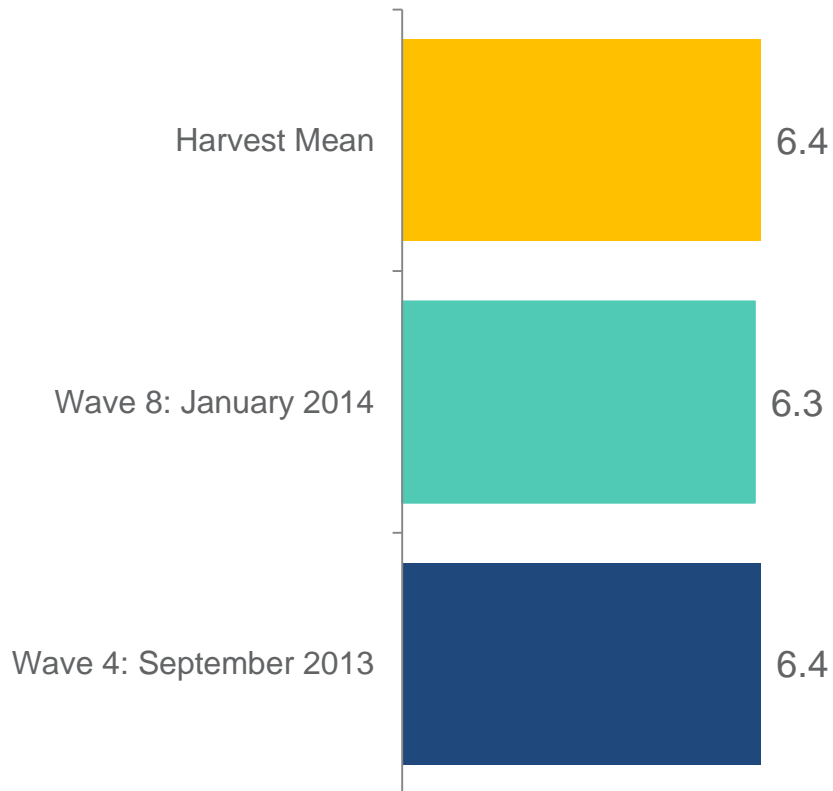
Q10. What cuisines do you cook/consume that use <commodity> ?

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> ?

⇒ Importance of Provenance

- ⇒ The provenance of Baby Spinach is important to Australian consumers – consistent with that measured in Wave 4 and the Harvest mean for all vegetables evaluated.



In Wave 3 consumers ranked “Australian Grown” as the most important factor in relation to provenance

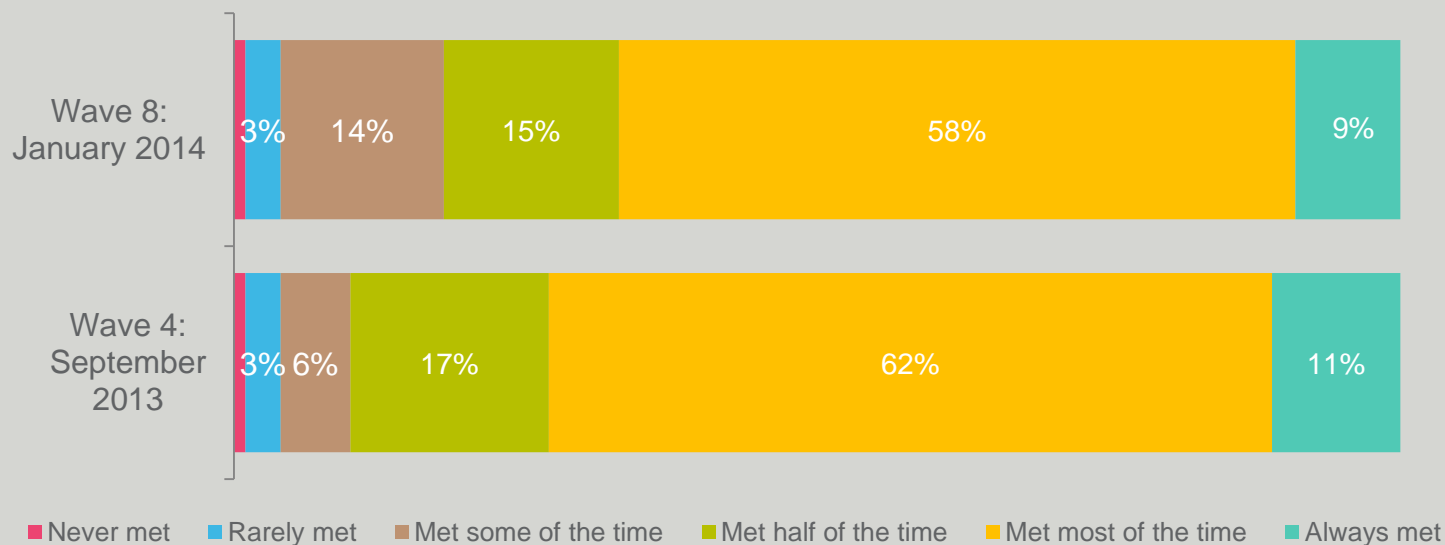
Q14. When purchasing <commodity>, how important is Provenance to you?
 Mean scores out of 10.
 Sample Wave 4, N=501 and Wave 8, N=300

Freshness and Longevity

Expected to stay fresh for **5.8 days** (cf. 5.5 days Wave 4)

- ⇒ Baby spinach was expected to stay fresh for nearly 6 days, which was in line with freshness from Wave 4.
- ⇒ However, expectations of freshness were less likely to be met in January compared to September, with expectations met at least most of the time on 67% of occasions, compared with 73% for Wave 4.

Expectations Met



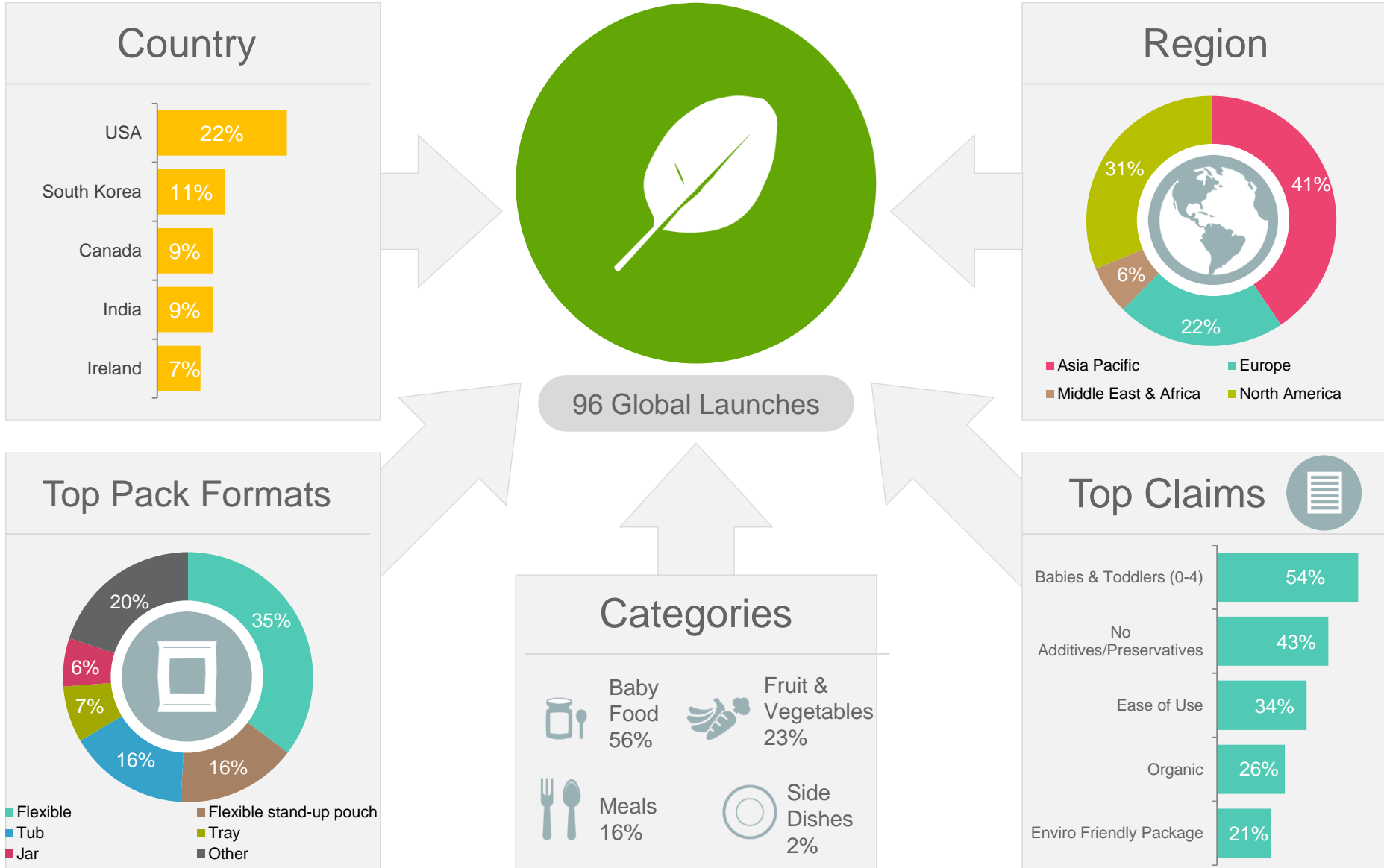


Trends: Baby Spinach

Baby Spinach Global NPDs

November 2013 – January 2014

There were 96 products launched globally that contained baby spinach over the last three months. The majority of the launches occurred in Asia Pacific and North America. Flexible packaging was the most common format used. Claims and categories were suited to the baby/toddler category



Baby Spinach Product Launches: Last 3 Months (November 2013- January 2014) Summary

- There were 96 global baby spinach products launched over the last 3 months, which was higher than the number of launches between July- September 2013. However, none of these launches were in Australia.
- The majority of launches occurred in Asia Pacific (41%) and Europe (31%).
- Flexible packaging remained the most common format used (35%).
- Top launch categories were baby food (56%), fruits & vegetables (23%), and meals (16%), which was consistent with previous trends.
- Over half of products launched used the claim “suitable for babies and toddlers” (54%) and no additives or preservatives (43%) was also popular.
- The most innovative baby spinach product launched was Earth’s Best Veggie Carrot, Spinach Potato Crisps from Hong Kong (examples of these can be found in the following pages).



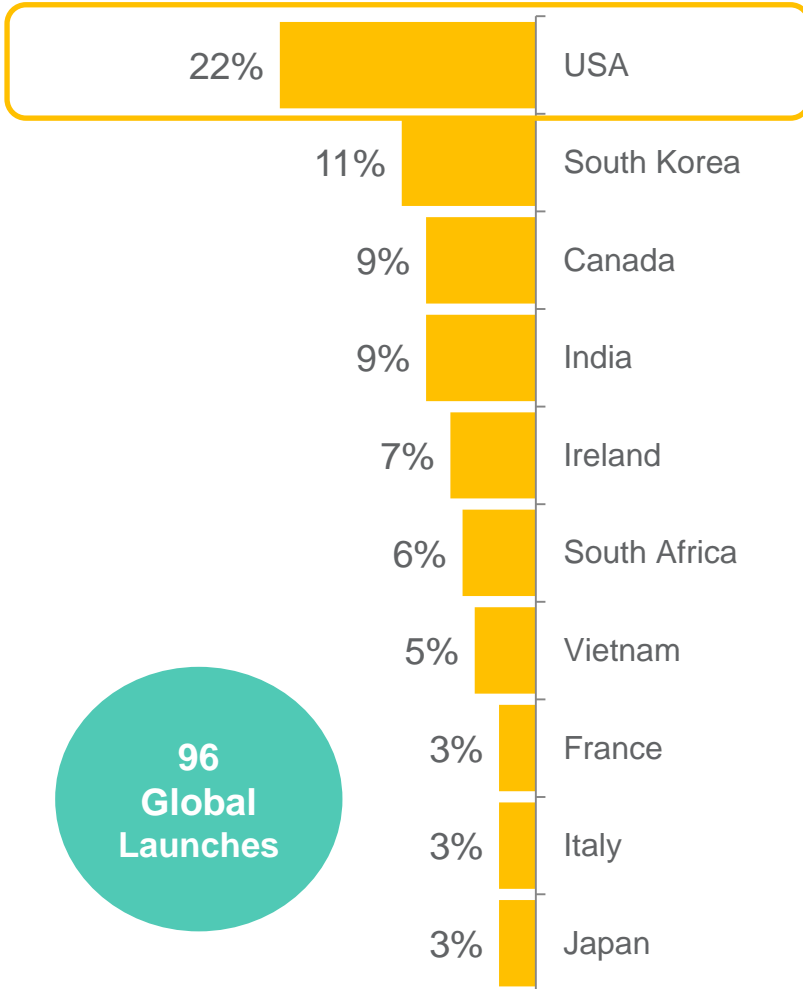
Source: Mintel (2014)

»»» Baby Spinach Launches

Country, Region & Categories

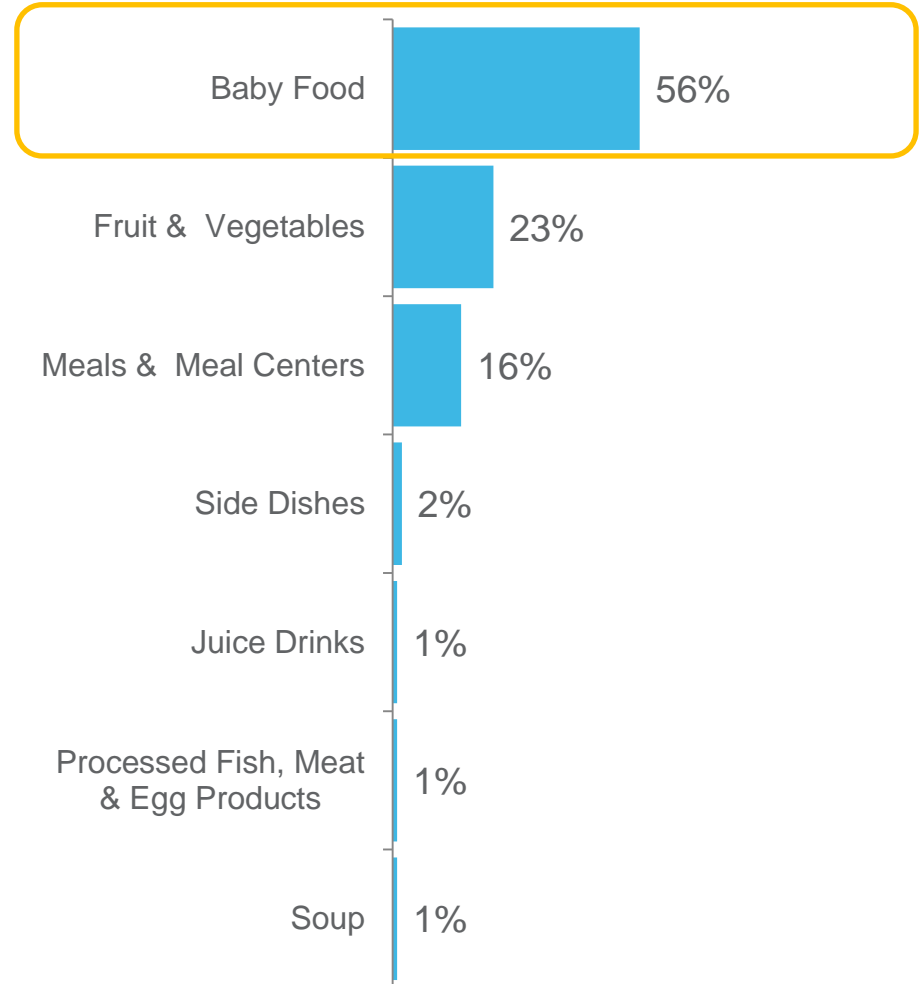
- The top launch country remained the USA, followed by South Korea and Canada.
- The majority of launches were baby food, followed by fruit and vegetable products and meals.

Top Launch Countries



96
Global
Launches

Top Launch Categories

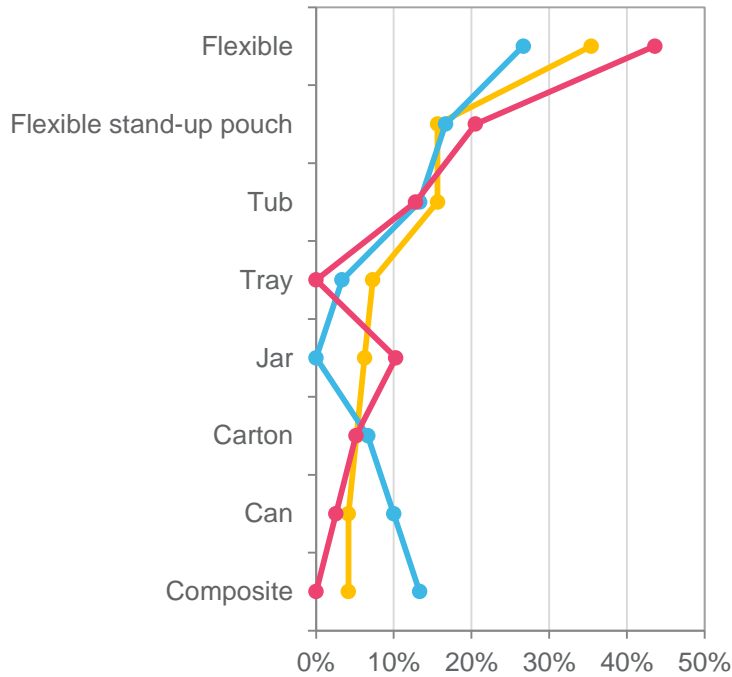


»»» Baby Spinach Launches

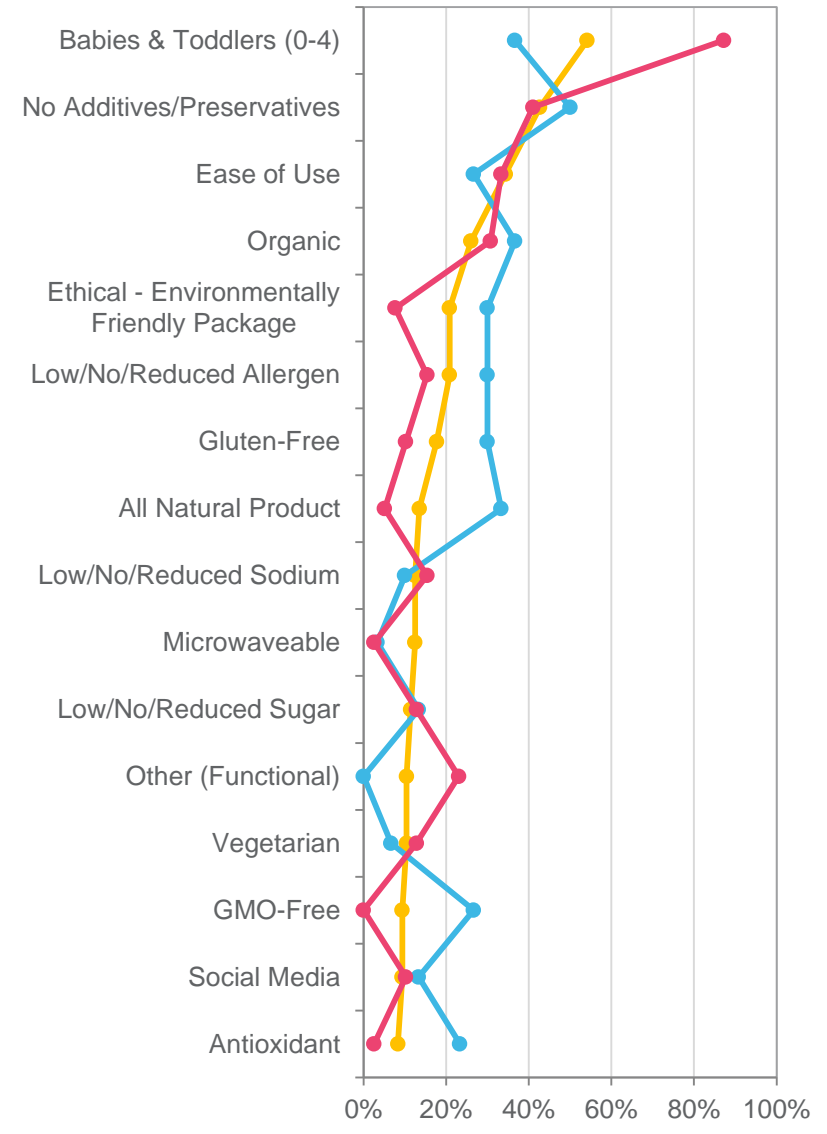
Top Claims & Pack Formats Used

- ▶ Flexible was the top pack format used, particularly in Asia Pacific.
- ▶ Top claims used were; suitable for babies and toddlers, no additives or preservatives, and ease of use, which was consistent with Wave 4 trends.

Pack Formats Launched



Top Claims Launched



Number of Global Baby spinach NPDs for the L3M N=96
Only regions >30 launches are displayed.

● Global (n=96)
 ● North America (n=30)
 ● Asia Pacific (n=39)



Innovative Baby Spinach Launches: L3M (November 2013 – January 2014)

Gerber Organic 2nd Foods Spring Vegetables with Brown Rice (India)

Gerber Organic 2nd Foods Spring Vegetables with Brown Rice provides 18mg DHA and 25mg choline per pack that helps support brain and eye development. The USDA organic certified product is unsweetened, unsalted, and contains no added starch, artificial flavours or colours.



Claims:
No Additives/Preservatives, Brain & Nervous System (Functional), Other (Functional), Ethical - Environmentally Friendly Package, Microwaveable, Ease of Use, Organic, Low/No/Reduced Sodium, Babies & Toddlers (0-4),

Renewallife Organic Rice Snack with Vegetables (South Korea)

Renewallife Organic Rice Snack with Vegetables comprises 97.7% of organic brown rice, organic carrot powder, organic spinach powder, organic kale powder and pesticide-free mulberry leaves. The brown rice has been cultivated using environment-friendly farming techniques in Yangpyeong and the governor of Yangpyeong guarantees its quality.



Claims:
Organic, Babies & Toddlers (0-4), Ethical - Environmentally Friendly Product, Convenient Packaging

Agugu Spinach with Potatoes (Poland)

Agugu Szpinak z Ziemniakami (Spinach with Potatoes) is a meal for babies from six months of age. This product contains no added sugars, no preservatives, gluten and salt, and does not need the addition of salt. It retails in a 190g jar.



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

Real Foods Spinach Salad (Canada)

Real Foods Spinach Salad with Dressing Pocket is now available. This product retails in a 170g pack including a 56g pack of Charlie's Honey Dijon dressing.



Claims:
N/A



Innovative Baby Spinach Launches: L3M (November 2013 – January 2014)

Nutricia Olvarit Mon Repas De Grand Spinach Leaves with Chicken (Belgium)

Nutricia Olvarit Mon Repas De Grand Feuilles d'Épinard au Poulet et aux Pommes de Terre (Spinach Leaves with Chicken and Potatoes) are said to be a complete and balanced meal for toddlers from 15 to 36 months. The microwavable meal with varied flavours and small pieces contains no preservatives or gluten and helps toddlers to begin chewing.



Claims:
No Additives/Preservatives, Low/No/Reduced Allergen, Other (Functional), Ethical - Environmentally Friendly Package, Microwaveable, Gluten-Free, Babies & Toddlers (0-4)

Parent's Choice Potato Munchers Spinach Cheddar Baked Potato Snack (USA)

Parent's Choice Potato Munchers Spinach Cheddar Baked Potato Snack is said to be a great way to introduce children to new tastes and textures, and is designed for children who self feed easily. The baked potato snack is naturally flavored with other natural flavors, and retail in a 1.23-oz. canister.



Claims:
Babies & Toddlers (0-4)

Gerber Organic 2nd Foods Fruit & Veggies Pear Spinach Baby Food (India)

Gerber Organic 2nd Foods Fruit & Veggies Pear Spinach Baby Food is suitable for sitting infants. The USDA organic certified baby food provides two servings of fruit and vegetables and is an excellent source vitamin C. It is unsweetened, unsalted and free from added starch, artificial flavours and artificial colours.



Claims:
No Additives/Preservatives, Social Media, Low/No/Reduced Sugar, Ease of Use, Organic, Low/No/Reduced Sodium, Babies & Toddlers (0-4)

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



Innovative Baby Spinach Launches: L3M (November 2013 – January 2014)

Ella's Kitchen Spinach, Apples + Rutabagas Super Smooth Puree (Canada)

Ella's Kitchen Spinach, Apples + Rutabagas Super Smooth Puree consists of 100% vegetables and fruits without any additives including water. This super smooth puree is formulated for infants aged over six months old. The USDA organic and kosher certified product is suitable for vegetarians and retails in a 90ml BPA-free pack.



Claims:
No Additives/Preservatives, Kosher, Ethical - Environmentally Friendly Package, Organic, Vegetarian, Babies & Toddlers (0-4)

Earth's Best Organic Pop Snax Veggie Carrot Spinach Potato Crisps (Hong Kong)

Earth's Best Organic Pop Snax Veggie Carrot Spinach Potato Rice & Potato Crisps a good source of iron, zinc and six B vitamins. This USDA organic and kosher certified product contains no artificial flavours, colours or preservatives and retails in a 45g pack.



Claims:
No Additives/Preservatives, Kosher, Babies & Toddlers (0-4), Organic

Brescia Centrale Del Latte Misticanza Salad (Italy)

Brescia Centrale Del Latte Le Pronte In Tavola Misticanza (Misticanza Salad) is grown in the region of Lombardia, Italy, according to integrated farm principles and sustainable methods. The ready to eat product has been washed, and retails in a 80g pack.



Claims:
Ease of Use, Ethical - Environmentally Friendly Product

Babybio Organic Infant Cereals with Vegetables (Vietnam)

Babybio Organic Infant Cereals with Vegetables are designed for babies from six months onwards. The product is free from gluten, milk, and milk protein. It is made with fair-trade quinoa flour, an ancient South American grain with a high nutritional value that has essential amino acids and is rich in natural minerals.



Claims:
Low/No/Reduced Allergen, Gluten-Free, Ethical - Environmentally Friendly Product, Ethical - Human, Organic, Babies & Toddlers (0-4)

A close-up photograph of numerous fresh Brussels sprouts, showing their characteristic rounded, layered green leaves and light-colored stems. The sprouts are densely packed and fill the entire background of the slide.

Brussels
Sprouts.

Purchase and Consumption Behaviour

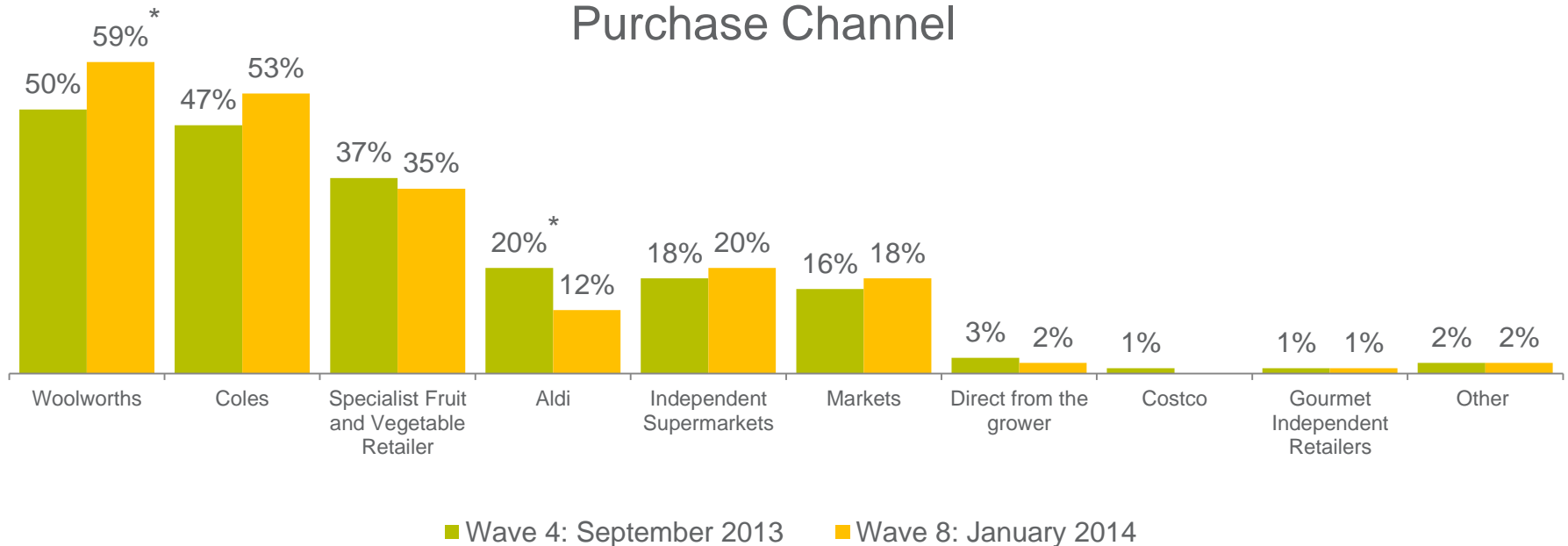
Brussels Sprouts

Average Purchase
3.1 times per month
(cf. 3.2 times per month, Wave 4)

Average Consumption
6.2 times per month
(cf. 5.8 times per month, Wave 4)

- ⇒ There were significant changes in purchase channels compared with Wave 4. There was an increase in purchases from Woolworths and a decrease in purchases from Aldi.
- ⇒ Purchase and consumption frequency were on trend with Wave 4.

Purchase Channel



Q1. On average, how often do you purchase <commodity> ?
 Q2. On average, how often do you consume <commodity> ?
 Q5. From which of the following channels do you typically purchase <commodity> ?
 Sample Wave 4, N=319 and Wave 8, N=293

⇒ Average Spend & Price Sensitivity

Brussels Sprouts



⇒ The average consumer typically purchased 700g of Brussels sprouts, compared with 600g in Wave 4.



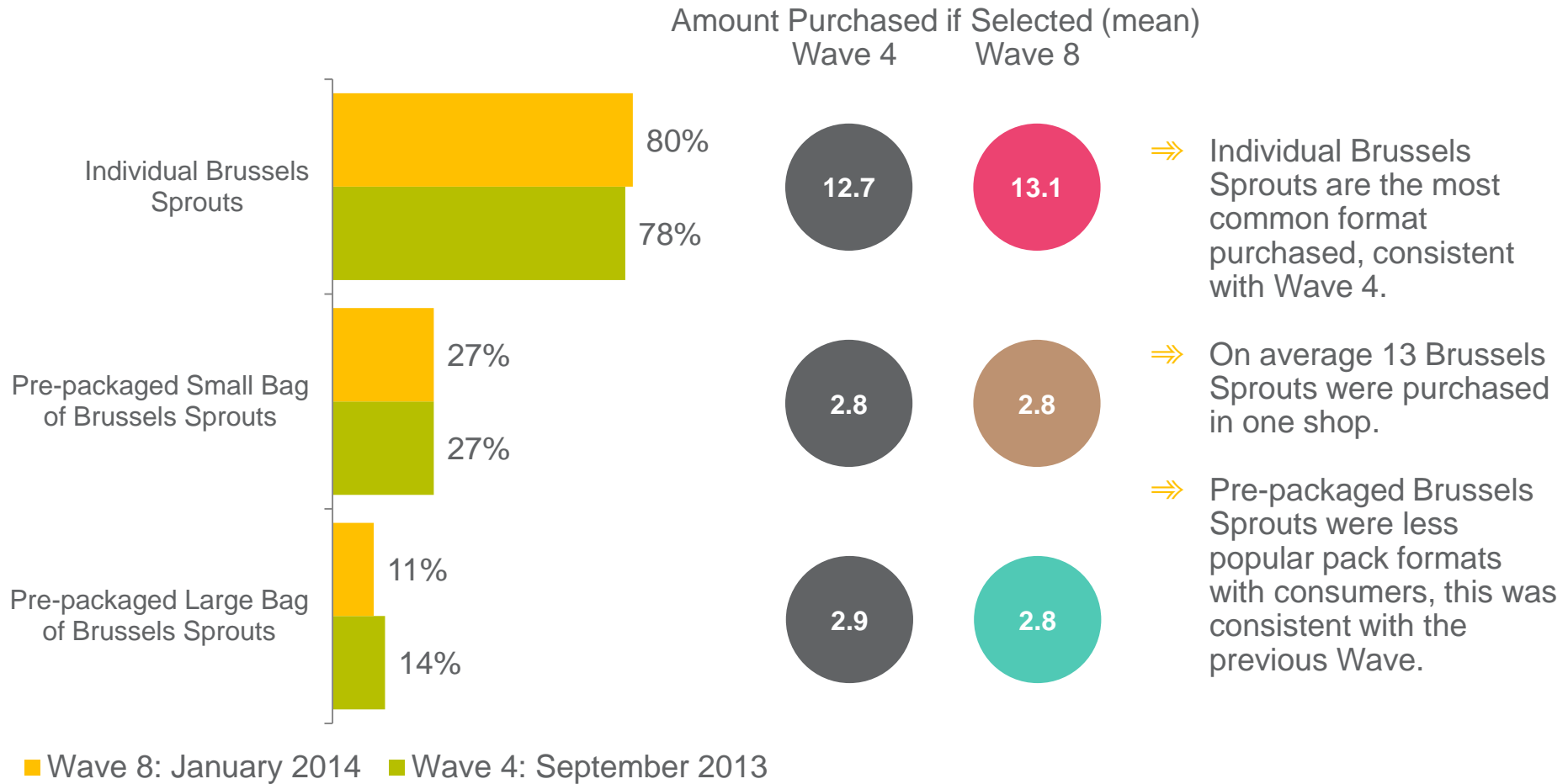
⇒ The average recalled last spend was significantly higher than Wave 4 (\$3.61), up 69c to **\$4.30**



⇒ There was a significant decrease in consumers' value for money perception of Brussels sprouts (**5.9/10**), compared with Wave 4 (6.5/10).

Increased last spend and decreased perception of value for money is most likely due to seasonality of Brussels sprouts.

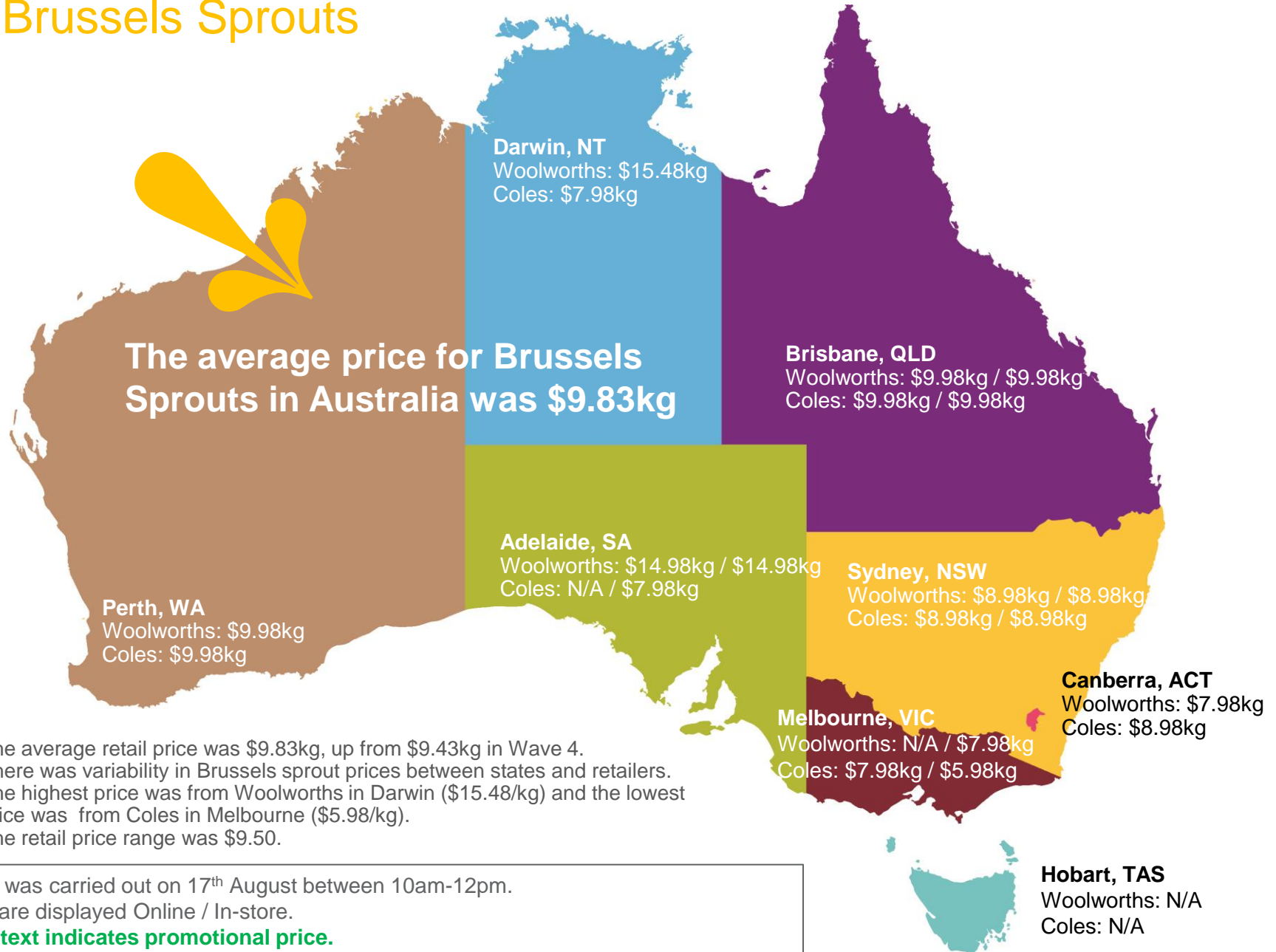
⇒⇒⇒ Pack Formats Purchased Brussels Sprouts



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

Online and In-store Commodity Prices

Brussels Sprouts



- The average retail price was \$9.83kg, up from \$9.43kg in Wave 4.
- There was variability in Brussels sprout prices between states and retailers. The highest price was from Woolworths in Darwin (\$15.48/kg) and the lowest price was from Coles in Melbourne (\$5.98/kg).
- The retail price range was \$9.50.

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

Green text indicates promotional price.

Spontaneous Awareness & Purchase Brussels Sprouts

- ▶ 90% of respondents could not name any type of Brussels sprouts.

“I didn’t know there were different varieties. They’re all good though!”

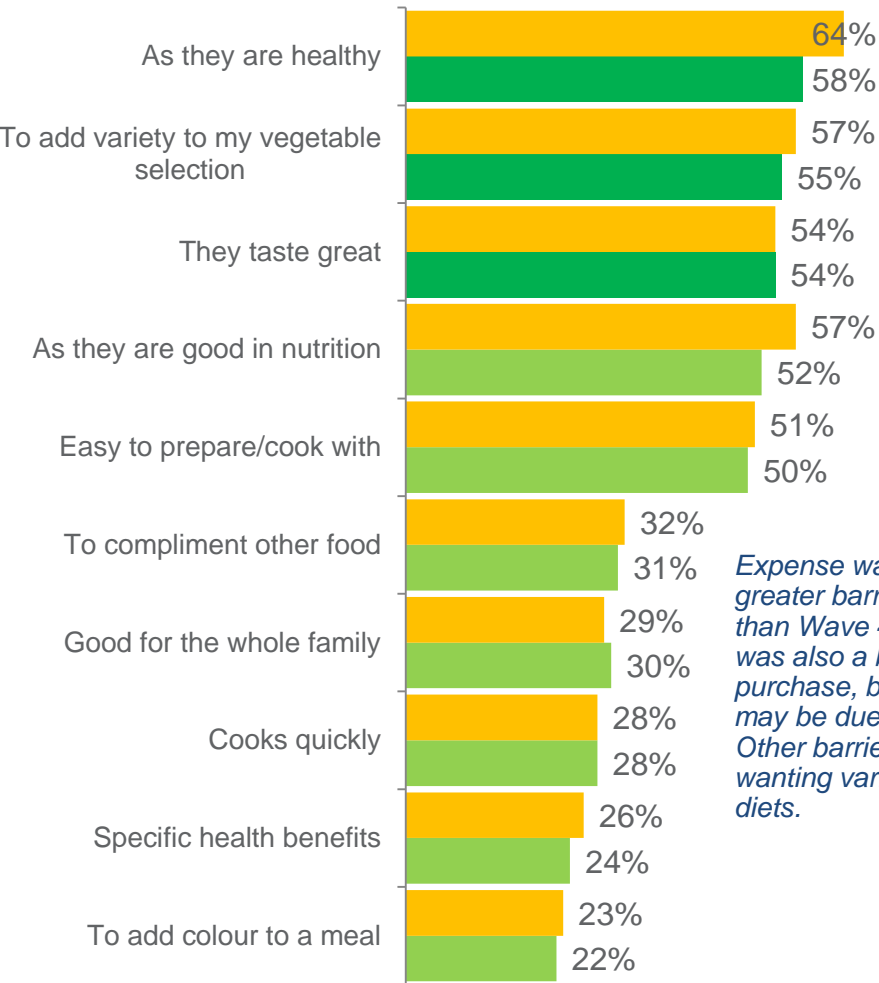




Triggers & Barriers to Purchase

Brussels Sprouts

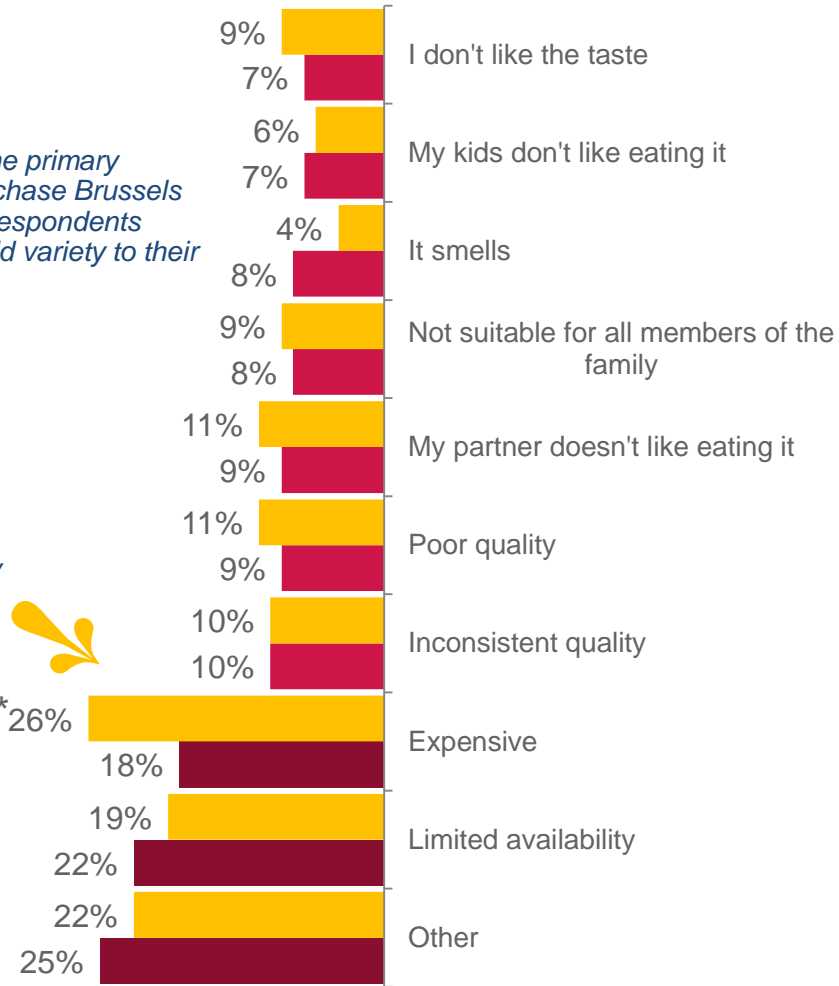
Triggers



Health was the primary trigger to purchase Brussels sprouts and respondents wanting to add variety to their diets.

*Expense was a significantly greater barrier to purchase than Wave 4. Availability was also a barrier to purchase, both of which may be due to seasonality. * Other barriers included wanting variety in their diets.*

Barriers



■ Wave 8: January 2014 ■ Wave 4: September 2013

■ Wave 8: January 2014 ■ Wave 4: September 2013

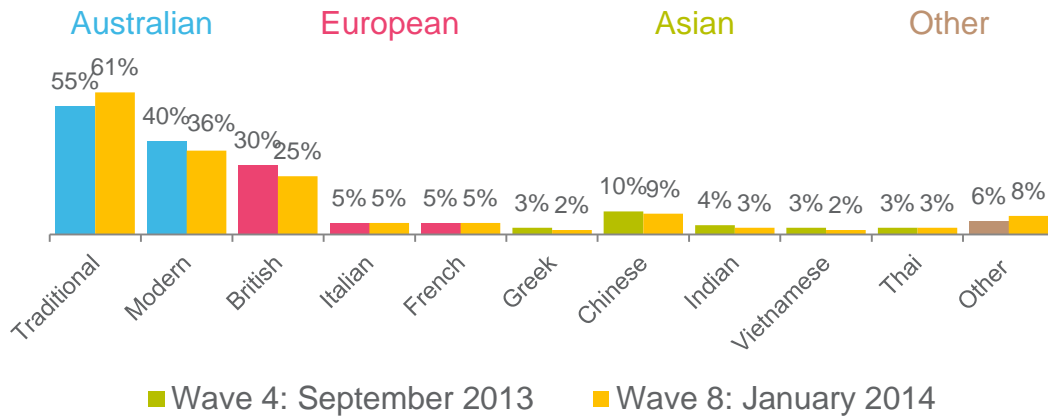
Sample Wave 4, N=319 and Wave 8, N=293
 Q7. Which of the following reasons best describes why you purchase <commodity> ?
 Q8. Which reason best describes why you don't buy <commodity> more often?



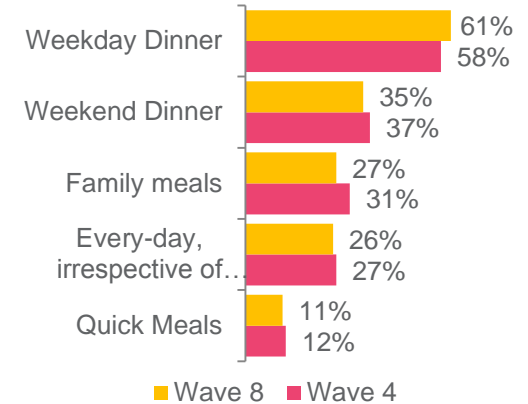
Cooking Preferences & Occasions: Brussels Sprouts

- ⇒ Australian cuisine was the most common cuisine used to cook Brussels Sprouts. They are most commonly cooked with potatoes, carrots and green peas (significantly higher in wave 8).
- ⇒ The top cooking styles used to cook Brussels Sprouts were steaming and boiling (consistent with wave 4).

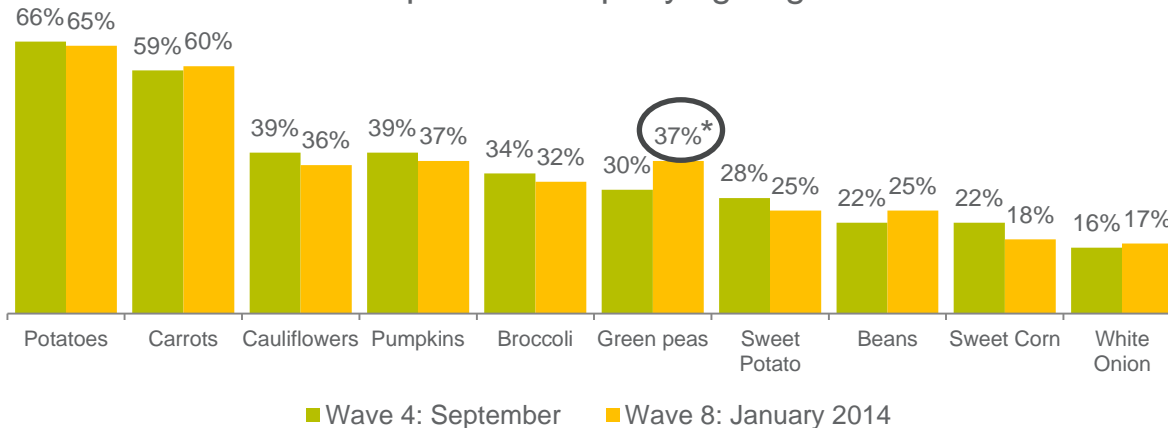
Typical Cuisine Cooked



Top 5 Consumption Occasions



Top 10 Accompanying Vegetables

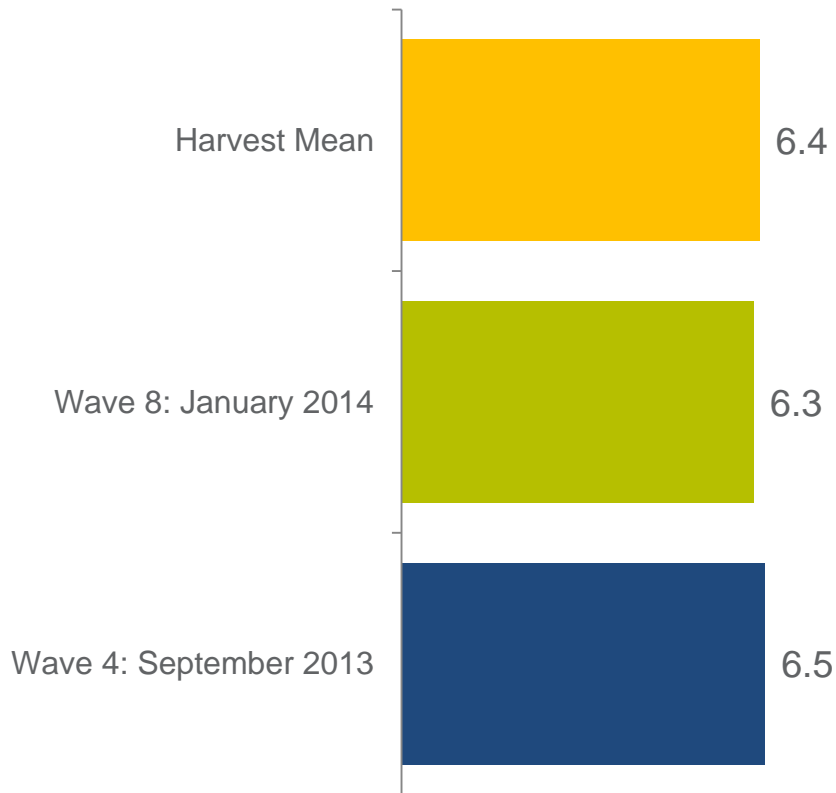


Top Cooking Styles		
	Wave 4	Wave 8
Steaming	57%	54%
Boiling	41%	44%
Microwave	22%	21%
Stir frying	16%	16%
Sautéing	10%	12%
Roasting	8%	8%
Stewing	8%	6%
Soup	8%	6%
Blanche	7%	6%
Baking	6%	1%

Sample Wave 4, N=319 and Wave 8, N=293
 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 there was a significant increase between Waves @95% CI

⇒ Importance of Provenance

⇒ Importance of provenance had decreased slightly since Wave 4, but is still consistent with the Harvest mean. The slight fall in importance may be due to seasonality, availability and increased expense as a barrier to purchase.



In Wave 3 consumers ranked “Australian Grown” as the most important factor in relation to provenance

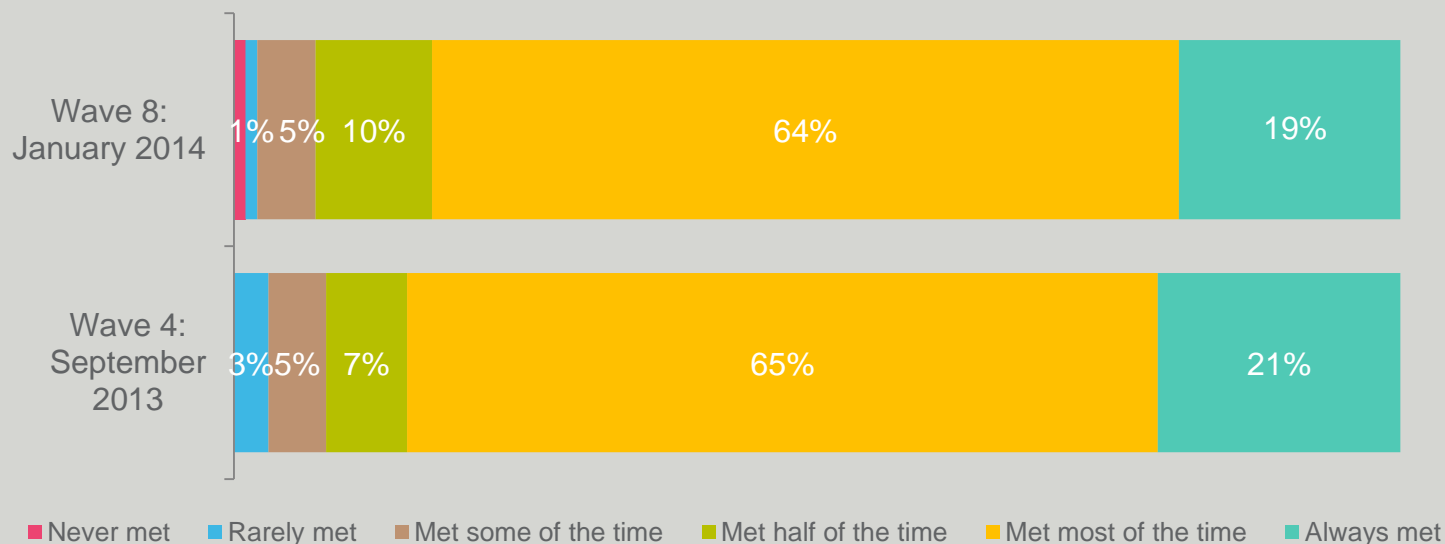
Q14. When purchasing <commodity>, how important is Provenance to you?
Mean scores out of 10.
Sample Wave 4, N=319 and Wave 8, N=293

⇒ Freshness and Longevity

Expected
to stay
fresh for
8.2 days
(cf. 8.2 days
Wave 4)

- ⇒ Brussels Sprouts were expected to stay fresh for over a week (average 8 days), which was consistent with Wave 4.
- ⇒ Expectations of freshness were also consistent with Wave 8, where freshness was met at least most of the time on 83% of occasions.

Expectations Met



Sample Wave 4, N=319 and Wave 8, N=293

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: Brussels Sprouts

*Due to low number of launches only Summary and Product slides will be shown.

Brussels Sprouts Global NPDs

November 2013 – January 2014

There were 15 global launches of products containing Brussels sprouts as an ingredient. The majority of launches were predominantly juice drinks in Japan and the USA.





Brussels Sprouts Product Launches: Last 3 Months (November 2013 – January 2014) Summary

- There were 15 products launched globally that contained Brussels sprouts as an ingredient in the last three months, which was consistent to previous trends analysis.
- No products were launched in Australia.
- Products were launched predominately in Japan (53%) and USA (40%).
- Consistent with previous launches, carton (47%) and can (20%) were the most used pack formats.
- Category launches were juices (53%), baby food (33%) and fruit & vegetables (13%).
- The most used claims for products launched were health orientated, including low sugar (73%) and low sodium (53%).
- Due to the low number of launches and categories' only 8 examples have been presented this month (examples of these can be found in the following pages).



Source: Mintel (2014)

→ Innovative Brussels Sprouts Launches: L3M (November 2013 – January 2014)

Tesco Christmas Brussels Sprouts with Chestnuts (Ireland)

Tesco Christmas Brussels Sprouts with Chestnuts are seasoned with cracked black pepper butter. This microwavable product is suitable for vegetarians, and retails in a 325g widely recycled pack.



Claims:
Seasonal, Vegetarian, Ethical - Environmentally Friendly Package, Microwaveable

Ito En Jujitsu Yasai Green Vegetable Juice (Japan)

Ito En Jujitsu Yasai Green Vegetable Juice has been reformulated and repackaged. It now contains more green peas and common beans purée to offer mild and fruity flavour. It is made with 21 vegetables and four fruits, is free from sugar and salt, and is naturally rich in dietary fibre.



Claims:
No Additives/Preservatives, Low/No/Reduced Sodium, Ethical - Environmentally Friendly Package, Low/No/Reduced Sugar, High/Added Fiber

Toddler Health Vanilla Flavored Rice Protein Base Nutritional Drink Mix (USA)

Toddler Health Vanilla Flavored Rice Protein Base Nutritional Drink Mix is available in a newly designed pack. The nutritionally balanced, non-GMO rice based drink mix for toddlers 13 months to 5 years of age is complete with vitamins and minerals, protein, antioxidants, fiber, enzymes, prebiotics, probiotics and Omega 3 (DHA).



Claims:
Prebiotic, All Natural Product, Low/No/Reduced Allergen, GMO-Free, Ethical - Environmentally Friendly Package, Ethical - Charity, Gluten-Free, Babies & Toddlers (0-4), Children (5-12), Antioxidant

Market Pantry Brussels Sprouts (USA)

Market Pantry Brussels Sprouts have been repackaged with an updated design. The microwavable product is said to be an excellent source of vitamin C and retails in a 16-oz. pack.



Claims:
Economy, Microwaveable



Innovative Brussels Sprouts Launches: L3M (November 2013 – January 2014)

Kagome Yasai Seikatsu 100 Yuzu Mix Juice (Japan)

Kagome Yasai Seikatsu 100 Yuzu Mix Juice is a new seasonal variety. It features refreshing flavour and contains yuzu from Kochi. The product is made with three fruits and 21 vegetables, is rich in vitamin C, and is free from preservative, added sugar and salt.



Claims:
No Additives/Preservatives,
Low/No/Reduced Sodium, Limited
Edition, Low/No/Reduced Sugar,
Seasonal

Ito En Rich Dietary Fiber Vegetable Juice (Japan)

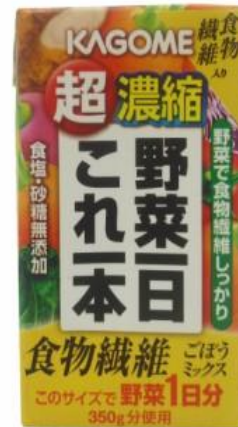
Ito En Shokubutu Seni Yasai (Rich Dietary Fiber Vegetable Juice) contains dietary fibre equivalent to 900g of lettuce. It is free from added sugar and salt. The product retails in a 200ml carton. Launched on October 14, 2013 with an RRP of 105 yen.



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

Kagome Yasai Ichinichi Kore Ippon Super Rich Vegetable Juice (Japan)

Pola 7shoku Yasai No Shikisai Shibori Yasai Mix Noshuku Juice (7-Color Vegetables Concentrated Mixed Juice) is a blend of 13 types of vegetables, with 7 colours of vegetables: red, orange, yellow, green, purple, white, and black. 450g of vegetables were used per can. The product retails in a 6 x 190g pack.



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

Ito En Jujitsu Yasai Premium Additive-Free Vegetable Juice (Japan)

Ito En Jujitsu Yasai Premium Mutenka (Premium Additive-Free Vegetable Juice) combines 30 types of vegetables and 5 types of fruit. It is free from added sugar, sodium, flavouring and preservatives.



Claims:
No Additives/Preservatives,
Low/No/Reduced Sodium, Premium,
Low/No/Reduced Sugar

A large, vibrant photograph of various bell peppers in shades of red, yellow, and green, arranged in a dense pattern. A large, semi-transparent grey circle is overlaid in the center of the image.

Capsicums.

➔ Purchase and Consumption Behaviour

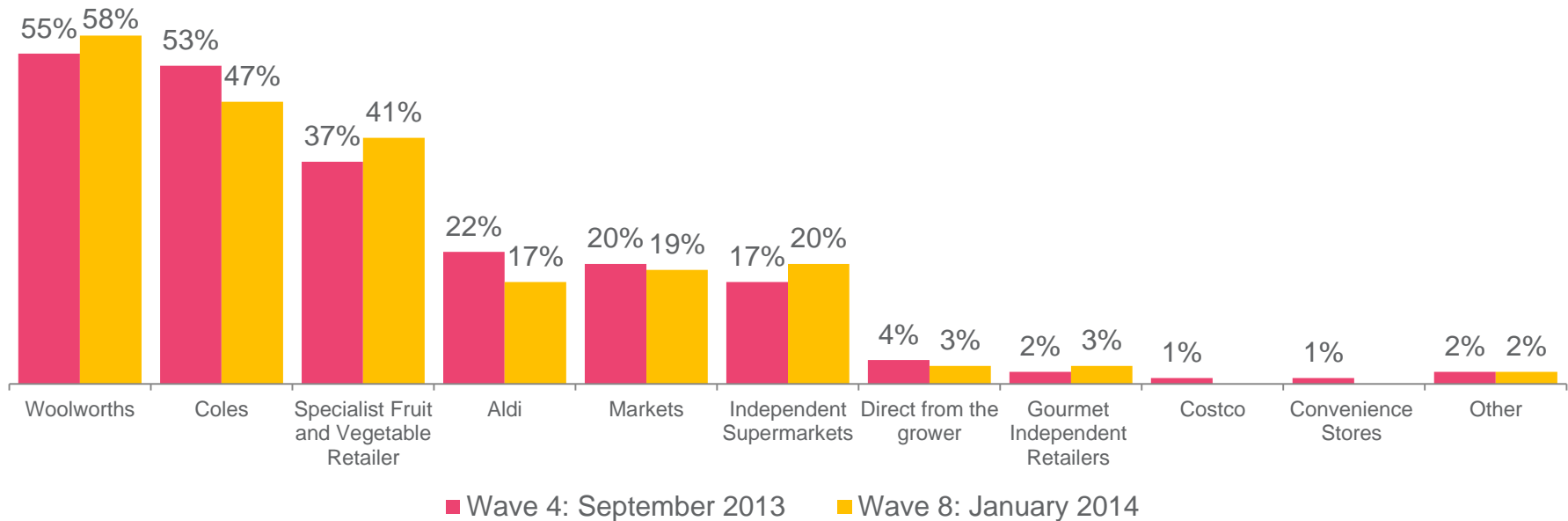
Capsicums

Average Purchase
4.2 times per month
(cf. 4.4 times per month, Wave 4)

Average Consumption
10.2 times per month
(cf. 10.3 times per month, Wave 4)

- ➔ Purchase and consumption frequency of capsicum was consistent with Wave 4, with purchase on average once a week.
- ➔ The key purchase channels were mainstream retailers and specialist retailers.

Purchase Channels



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 4, N=499 & Wave 8, N=313

⇒ Average Spend & Price Sensitivity

Capsicums



⇒ The average consumer typically purchases **700g** of Capsicum, the same as Wave 4.



⇒ The average recalled last spend on Capsicum was **\$4.00**, up 11c from Wave 4.

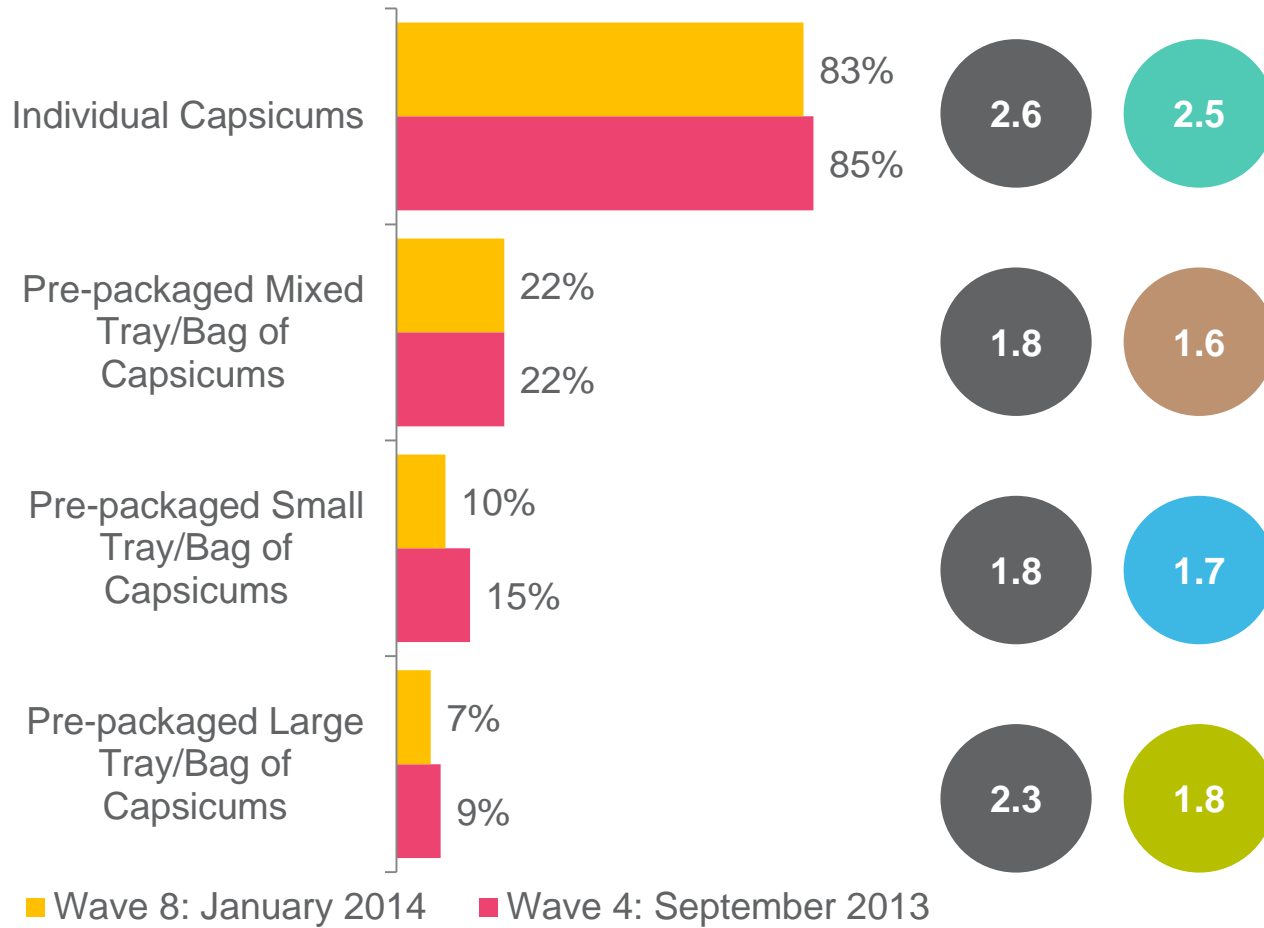


⇒ Consumer perception of value had significantly decreased since Wave 4 (6.3/10) to **5.8/10** in Wave 8.

⇒⇒⇒ Pack Formats Purchased

Capsicums

Amount Purchased if Selected (mean)
Wave 4 Wave 8

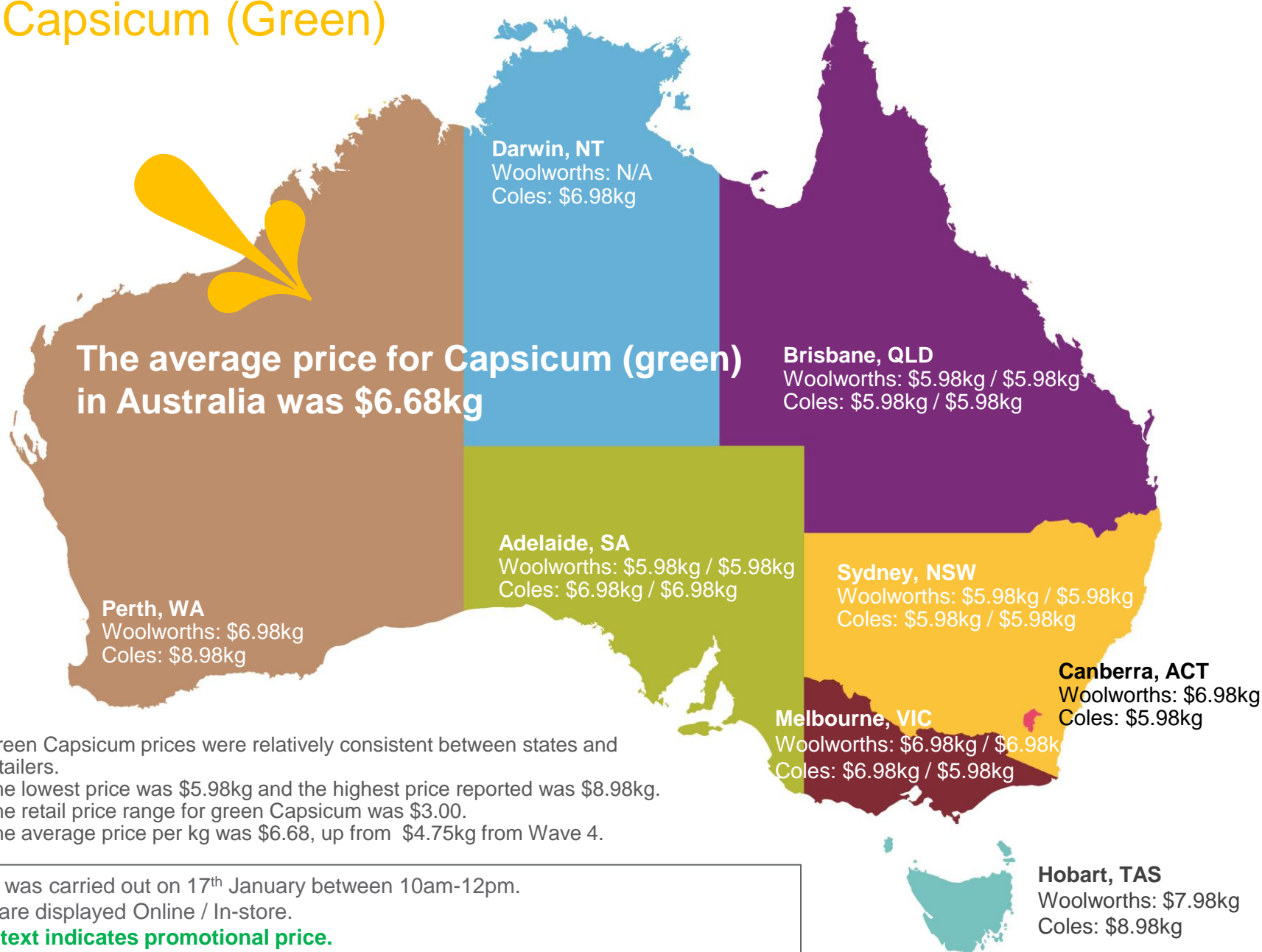


- ⇒⇒ Individual capsicums were the most purchased format, consistent with Wave 4.
- ⇒⇒ On average consumers purchased over 2 capsicums per shop.
- ⇒⇒ Pre-packed formats were less popular with consumers, although one in five consumers purchased a mixed tray.

Q3a. How much <commodity> does this typically equate to?
Sample Wave 4, N=499 & Wave 8, N=313

Online and In-store Commodity Prices

Capsicum (Green)



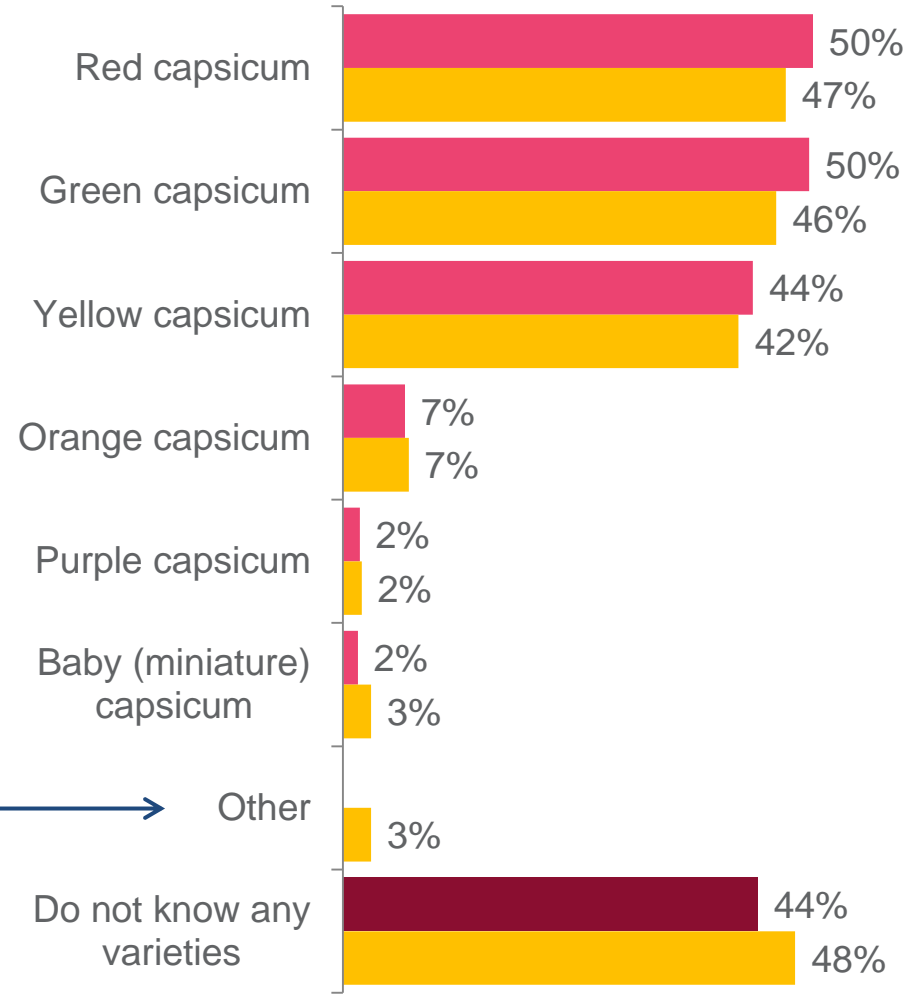
- Green Capsicum prices were relatively consistent between states and retailers.
- The lowest price was \$5.98kg and the highest price reported was \$8.98kg. The retail price range for green Capsicum was \$3.00.
- The average price per kg was \$6.68, up from \$4.75kg from Wave 4.

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

Spontaneous Awareness & Purchase Capsicum

- ▶ Colour remained the dominant differentiator for capsicum varieties, with red, green and yellow the most recalled types.
- ▶ There was still a relatively high level of respondents unable to recall a type of capsicum, which was consistent with Wave 4 levels.

Respondents recalled specific varieties of chillies, such as banana, jalapeno & cayenne peppers.

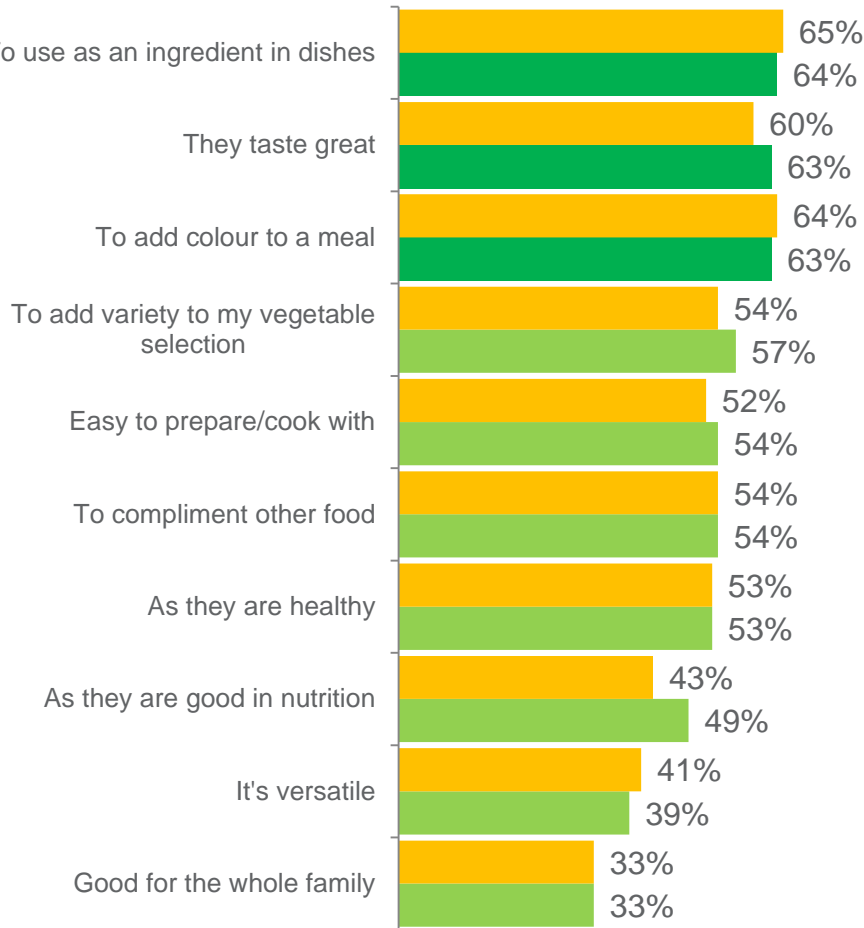


■ Wave 4: September 2013 ■ Wave 8: January 2014

Triggers & Barriers to Purchase

Capsicums

Triggers

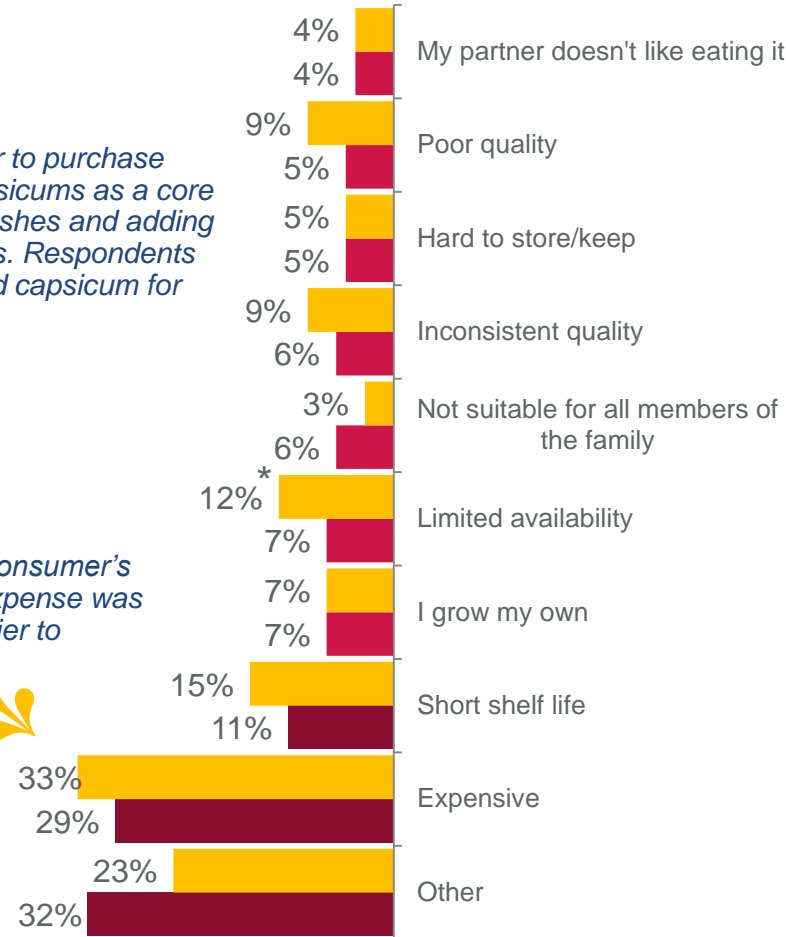


■ Wave 8: January 2014 ■ Wave 4: September 2013



The key trigger to purchase was using capsicums as a core ingredient in dishes and adding colour to meals. Respondents also purchased capsicum for the taste.

Barriers



■ Wave 8: January 2014 ■ Wave 4: September 2013

Over a third of consumer's indicated that expense was the primary barrier to purchase.

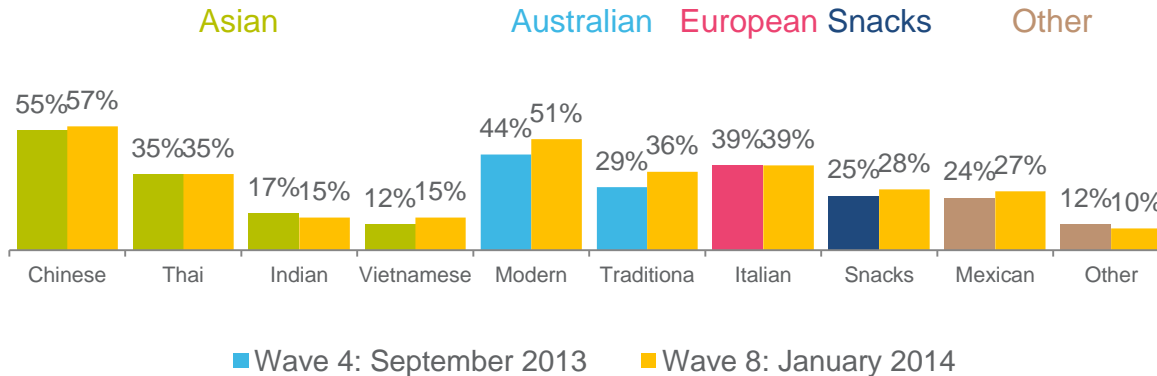


N=501
 Q7. Which of the following reasons best describes why you purchase <commodity>?
 Q8. Which reason best describes why you don't buy <commodity> more often?

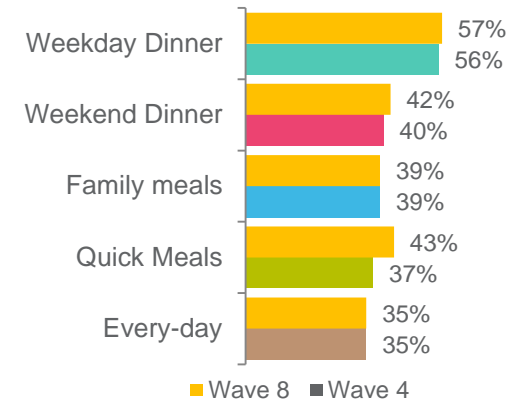
Cooking Preferences & Occasions: Capsicums

- ⇒ Capsicums were consistently used in stir-frys and raw for Asian and Australian cuisine.
- ⇒ Dinners remained the top consumption occasion, quick meals were also becoming popular meal occasions as well.
- ⇒ Capsicum was typically served with tomatoes, carrots and red onion.

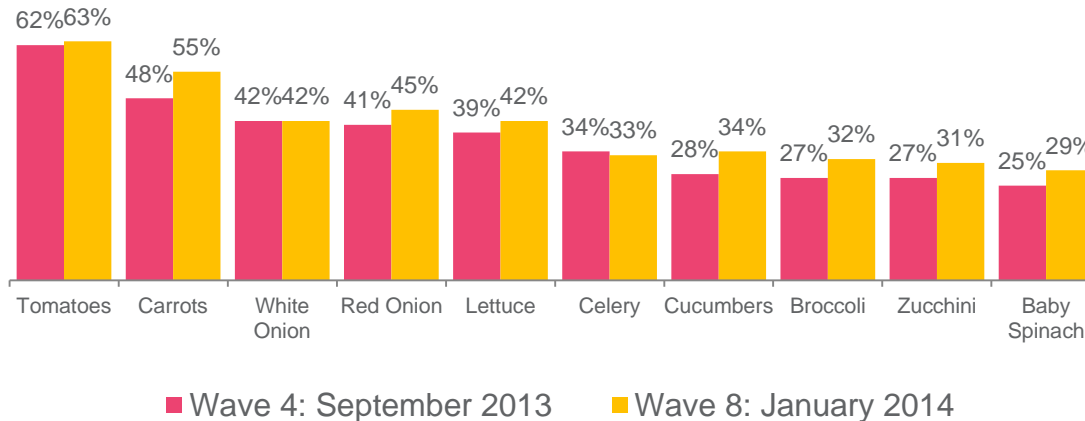
Typical Cuisine Cooked



Top 5 Consumption Occasions



Top 10 Accompanying Vegetables

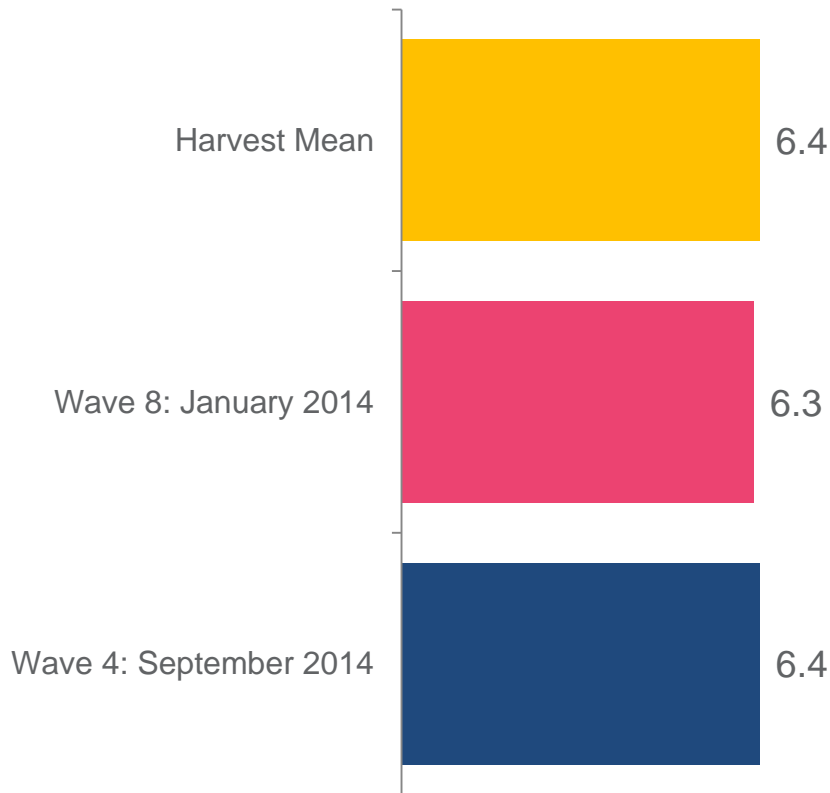


Top 10 Cooking Styles		
	Wave 4	Wave 8
Stir frying	73%	77%
Raw	58%	55%
Roasting	32%	28%
Stewing	21%	16%
Grilling	20%	21%
Sautéing	19%	20%
Soup	17%	12%
Shallow Frying	15%	12%
Baking	15%	19%
Steaming	13%	12%

Sample Wave 4, N=499 and Wave 8, N=313
 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>?

⇒ Importance of Provenance

⇒ The provenance of Capsicums is important to Australian consumers – consistent with that measured in Wave 4 and the Harvest mean for all vegetables evaluated.



In Wave 3 consumers ranked “Australian Grown” as the most important factor in relation to provenance

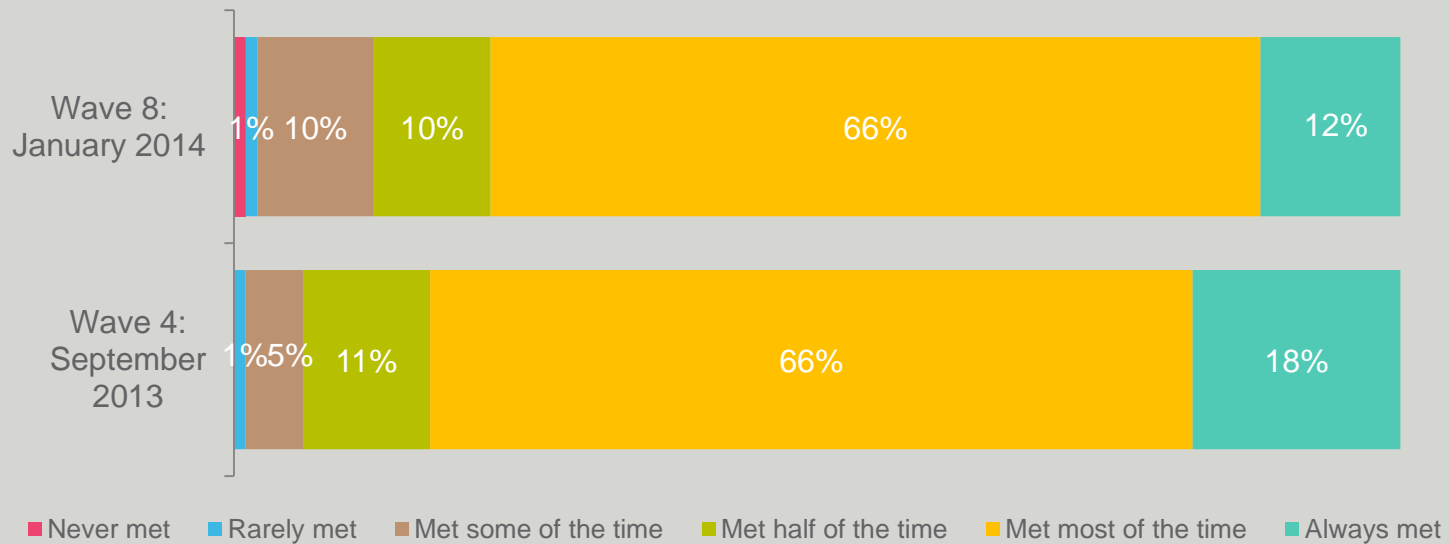
Q14. When purchasing <commodity>, how important is Provenance to you?
Mean scores out of 10.
Asian Vegetables N=421
Baby Spinach N=499
Brussels Sprouts N=319
Capsicum N=501

➡➡➡ Freshness and Longevity: Capsicums

Expected to stay fresh for **7.9 days** (cf. 8.1 days Wave 4)

- ➡➡ Capsicum was expected to stay fresh for 8 days, which was consistent with Wave 4.
- ➡➡ Overall there was a decrease in perceptions of freshness from Wave 4 to Wave 8, however, overall expectations of freshness were met at least most of the time for capsicums.

Expectations Met



N=501
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> ?



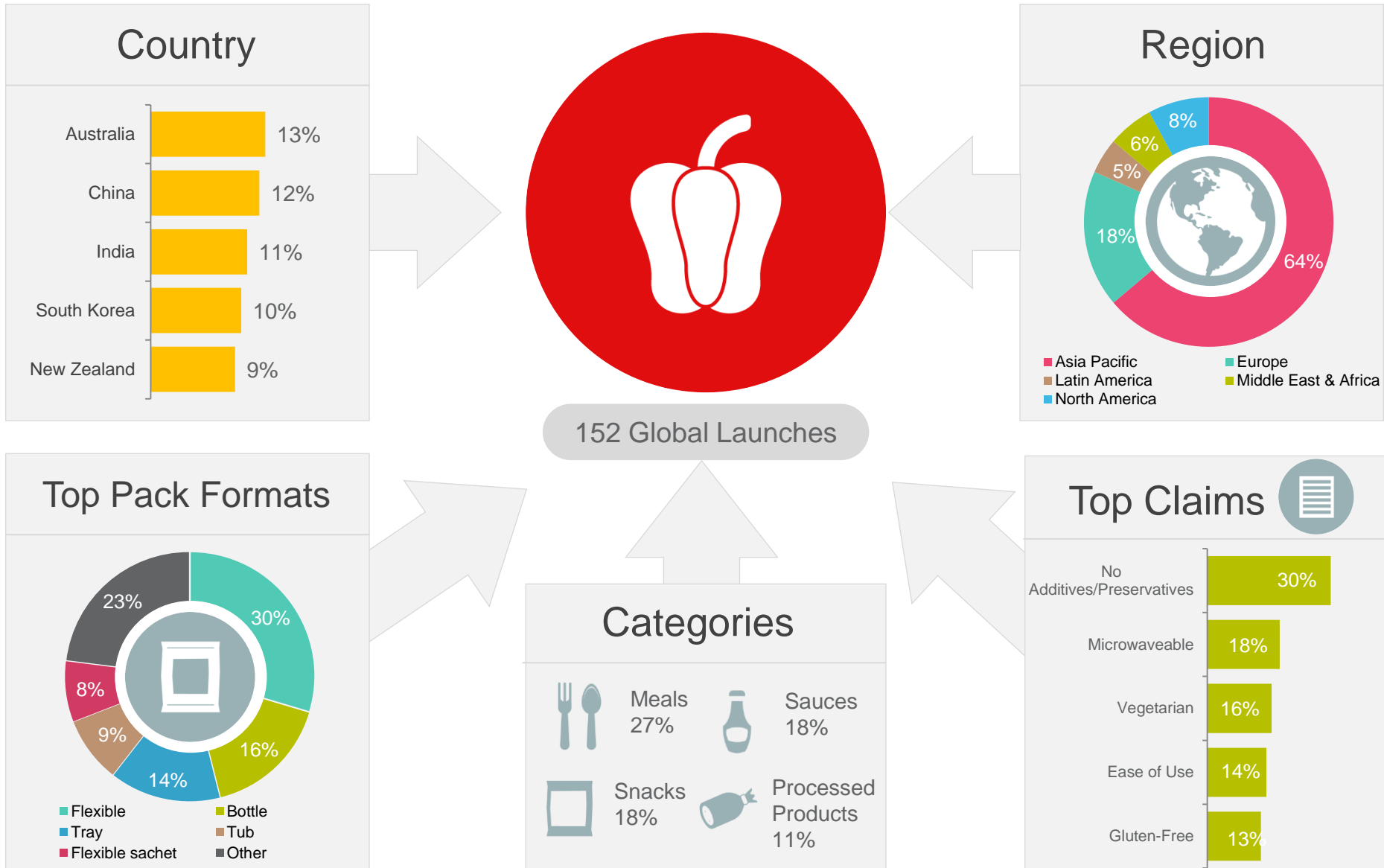
Trends: Capsicums

**Mintel search term was Capsicum*

Capsicum Global NPDs

November 2013 – January 2014

There were 152 global launches containing capsicum as an ingredient. Asia Pacific was the key region for launches, specifically Australia, China and India. Top category launches were for meals, sauces and snacks.





Capsicum Product Launches: Last 3 Months (November 2013 – January 2014) Summary

- There were 152 products launched globally in the last three months that contained capsicum (capsicum, specifically, was used as the search term).
- There were 19 products launched in Australia (13%), the most innovative products can be found in the following slides.
- Launches primarily occurred in Asia Pacific (64%) and Europe (18%).
- Flexible pack format (30%) and bottles (16%) were the most used packaging for products over the last three months.
- The meal category had the largest number of product launches (27%), followed by sauces and snacks (18% each).
- Top claims used were no additives or preservatives (30%), microwavable (18%) and processed products (11%).
- The most innovative product launches were Lansley Body Expert Lift and Firm serum and Desert Pepper Trading Company Tequila Salsa (examples of these can be found in the following pages).



Source: Mintel (2014)

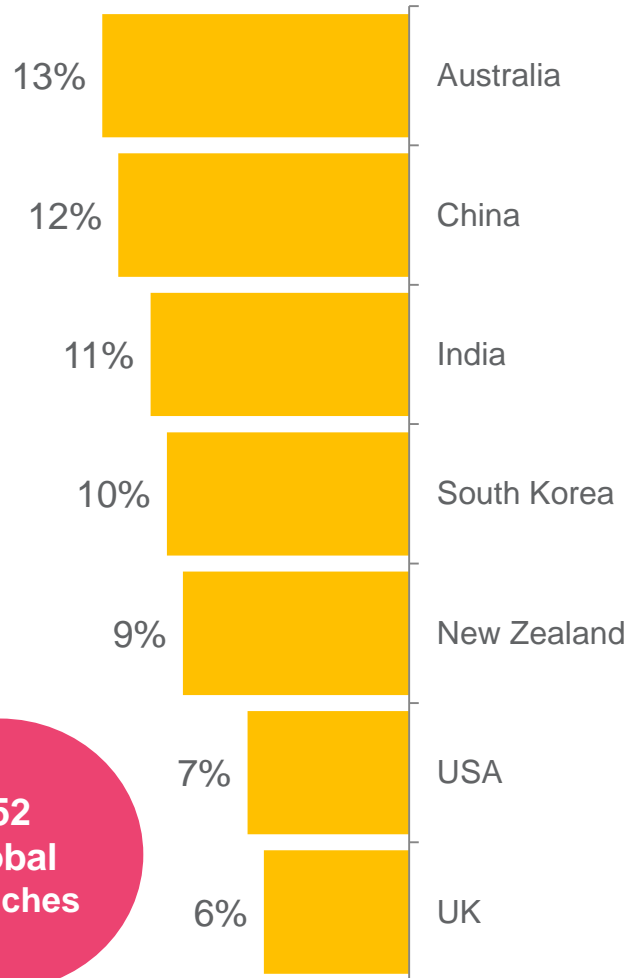


Capsicum SKUs

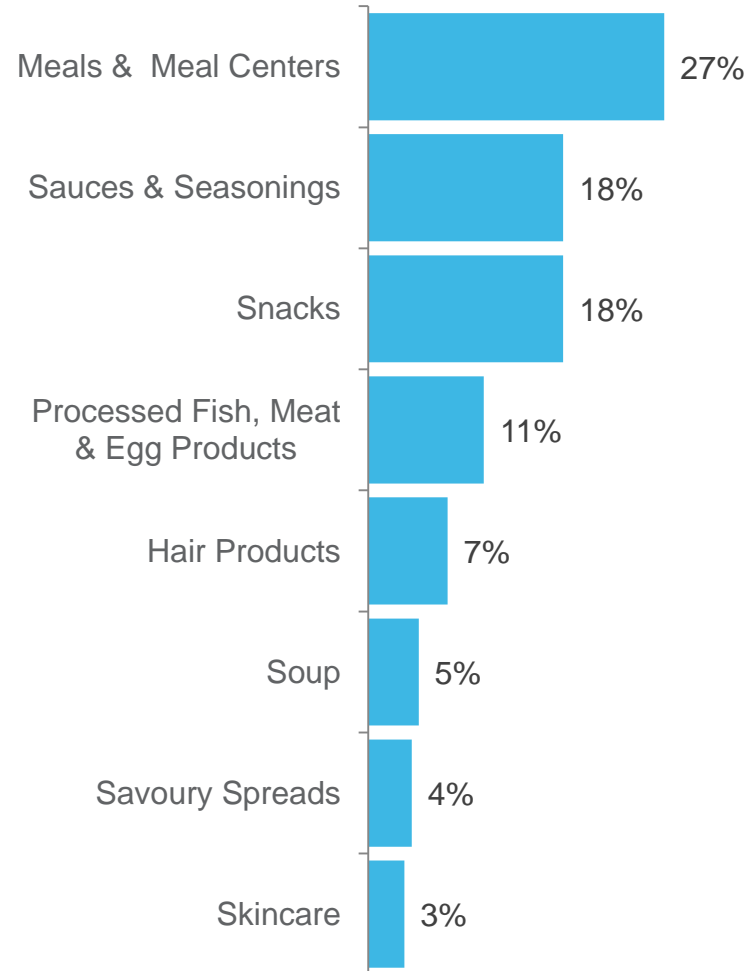
Country, Region & Categories

- The countries with the most launches were Australia, China and India. ⁸⁷
- Meals, sauces and snacks were the main categories for launches over the last three months.

Top Launch Countries



Top Launch Categories



152
Global
Launches

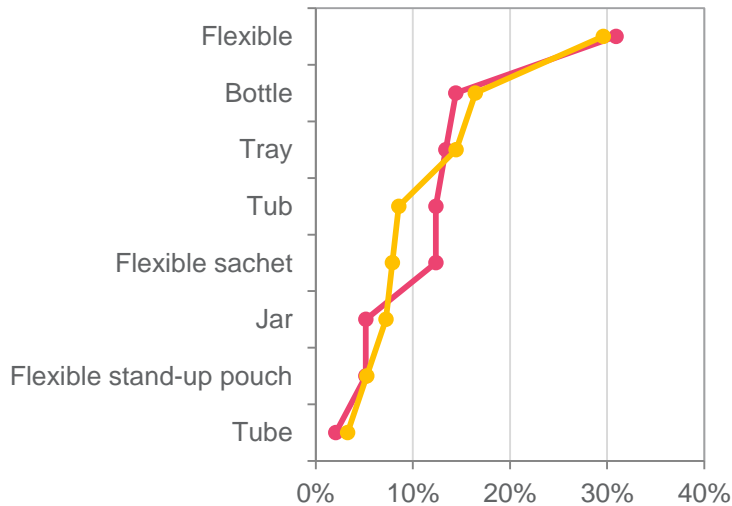


Capsicum Launches

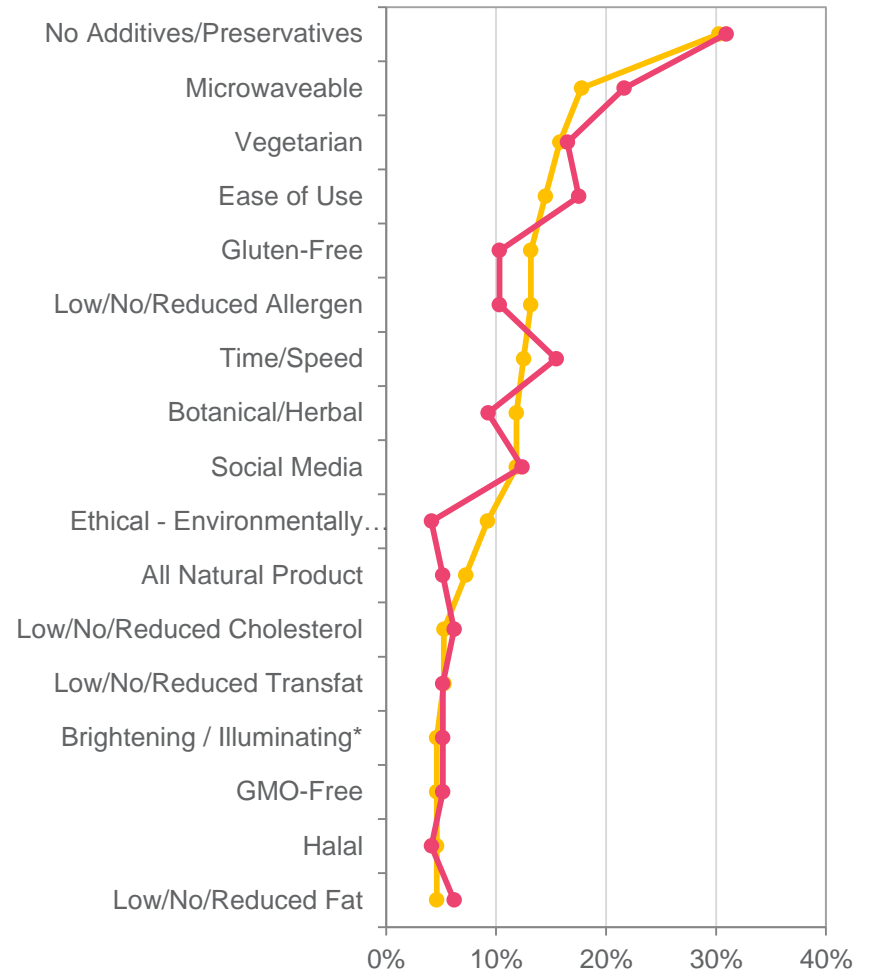
Top Pack Formats Used

- ▶ The most common claims used for new product launches were convenience (microwaveable, ease of use) and health claims (no additives, gluten free).
- ▶ Top pack formats launched in the last three months were flexible, bottle and jar.

Top Packs Launched



Top Claims Launched



Number of Global Capsicum NPD for the L3M N=152
Only regions with n >30 are displayed

● Global (n=152) ● Asia Pacific (n=97)

»»» Innovative Capsicum Launches: L3M (November 2013 – January 2014)

Banjara's Black Henna (India)

Banjara's Black Henna has been relaunched with a new ammonia-free formula, and a newly designed 20g pack. The product is enriched with capsicum to accelerate hair re-growth and increase blood circulation on the scalp, as well as treating hair-loss conditions.



Claims:
Botanical/Herbal, Brightening / Illuminating*, Anti-Hairloss, Long-Lasting*, Ease of Use

Original Source Reviving Black Pepper and Chilli Bath (Egypt)

Original Source Reviving Black Pepper and Chilli Bath contains natural 'stuff', and is designed to provide a warmer alternative to ice baths, with mixed black pepper and little habanero chilli to make an original reviving bath experience. The vegan-certified product retails in a 500ml recyclable pack.



Claims:
Botanical/Herbal, Vegan, Ethical - Environmentally Friendly Package, No Animal Ingredients

Delizie di Calabria Red Chilli Pepper Spread (Italy)

Delizie di Calabria Dolcezza di Peperoncino (Red Chilli Pepper Spread) is now available. This spread is made with Calabria red chilli pepper and sugar, and is rich and nutritious. It is excellent to spread on bread, biscuits or enjoyed with cheeses or boiled meats as well as cold cuts.



Claims:
N/A

Maggi Healthy Soups Chinese Tomato Soup (India)

Maggi Healthy Soups Chinese Tomato Soup comes with five senses granules, including hear granules which rustle, see natural colour of vegetables, touch granules full of vegetable pureé, smell fresh vegetables aroma, and taste goodness of real soup.



Claims:
No Additives/Preservatives, Vegetarian

➤➤➤ Innovative Capsicum Launches: L3M (November 2013 - January 2014)

The City Kitchen Mexican Meals Meatballs in Spicy Tomato Sauce (Australia)

The City Kitchen Mexican Meals Meatballs in Spicy Tomato Sauce are now available. They comprise beef meatballs cooked in a spicy, smokey tomato sauce and served with Mexican rice. This microwaveable product is ready in three minutes and retails in a 350g pack serving one portion.



Claims:
Microwaveable

Desert Pepper Trading Company Tequila Salsa (USA)

Desert Pepper Trading Company Tequila Salsa is a concoction of red tomato, fiery chiles and bright, silver tequila. The all natural and gluten free sauce with medium burn contains no additives and retails in a 16-oz. jar.



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

Lansley Body Expert Lift and Firm Serum (Thailand)

Lansley Body Expert Lift and Firm Serum is said to be fast-acting and effective for a firmer and slimmer shape. It is formulated with: capsicum extract, a thermo-genic ingredient, and L-carnitine to enhance blood circulation and stimulate body to burn more fat.



Claims:
Botanical/Herbal, Anti-Cellulite, Firming*, Time/Speed, Slimming*

Mackie's of Scotland Scotch Bonnet Chili Pepper Chips (USA)

Mackie's of Scotland Scotch Bonnet Chili Pepper Chips are made from naturally grown potatoes. The vegetarian product retails in a 5.3-oz. pack.



Claims:
Vegetarian

➤➤➤ Innovative Capsicum Launches: L3M (November 2013 - January 2014)

Dani 100% Dry Red Pepper (Spain)

Dani 100% Noras (100% Dry Red Pepper) has been repackaged in a newly designed pack. These peppers can be used in vegetable soups, meat and game stews, or just on their own. The product retails in a pack containing three units.



Claims:
N/A

Tarczynski Kabanos Exclusive Party Mix Sausage Assortment (Poland)

Tarczynski Kabanos Exclusive Party Mix (Party Mix Sausage Assortment) contains poultry sausages with added pork meat, pork sausages, and pork sausages with chilli. This product retails in a 150g pack, containing 3 x 50g packets.



Claims:
N/A

MasterKong Shuang La Ban Mian Spicy Beef Noodles (China)

MasterKong Shuang La Ban Mian You La Zi Ma La Niu Rou Mian (Spicy Beef Noodles) come with classic beef sauce from MasterKong. This instant product retails in a 130g pack.



Claims:
Time/Speed

Laboratoires Biocos Lovea L'Argan Regenerating Body Scrub (France)

The Laboratoires Biocos Lovea Bio range is certified by the EcoCert and CosmécBio, featuring products that are 98% natural in origin and free from parabens, dyes, silicones, phenoxyethanol, PEGs, nano and artificial fragrances. Available as part of the L'Argan (Argan) sub-range is Gommage Corps Régénérant (Regenerating Body Scrub)



Claims:
No Additives/Preservatives, Silicone Free, Paraben Free, Cleansing*, Botanical/Herbal, Exfoliating, Organic



Australian Capsicum Launches: L3M (November 2013 - January 2014)

Edmonds 100% Fat Free Italian Salad Dressing

Edmonds 100% Fat Free Italian Salad Dressing is a zesty dressing made with a splash of lemon juice and Italian herbs. This classic product contains no artificial colours or flavours, and retails in a 330ml recyclable bottle.



Heinz Little Kids Ravioli Bolognese

Heinz Little Kids Ravioli Bolognese, is a source of iron and protein and made with ravioli, beef and a variety of different vegetables with a right portion size for little tummies and a right texture to encourage chewing.



Continental Cup A Soup Hot N Spicy Chicken Noodle Flavoured Soup

Continental Cup A Soup Hot N Spicy Chicken Noodle Flavoured Soup Mix is free from artificial colours, flavours, added MSG and 99% fat free. This product retails in a 55g recyclable pack providing two servings.



Alana's Pantry Spicy Morocco Sauce

Alana's Pantry Spicy Morocco Sauce is an aromatic cumin and red chilli harissa sauce with a hot heat level. This halal certified product, with natural ingredients, is free from preservatives, colours and gluten, and retails in a 250ml pack.



MasterFoods Mild Moroccan Seasoning

MasterFoods Mild Moroccan Seasoning is suggested for use on lamb, chicken or beef dishes before grilling, barbecuing or pan frying, or for adding to rice dishes and salads. It retails in a 47g partially recyclable pack.



Table of Plenty Spanish Barbecue Natural Spice Blend

Table of Plenty Spanish Barbecue Natural Spice Blend is Spanish smoked paprika blend with herbs and spices that is suitable for chicken, beef, seafood and soups.



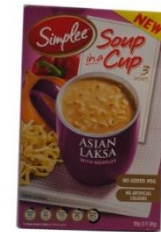
Obela Tuscan Garden Hommus

Obela Savoury Tuscan Garden Hommus has a creamy smooth texture, and is garnished with veggies and spices. The gluten-free product contains no artificial flavours or colours and retails in a 220g pack.



Simplee Soup in a Cup Asian Laksa with Noodles Soup

Simplee Soup in a Cup Asian Laksa with Noodles Soup contains no added MSG, artificial colours or preservatives and provides a source of fibre. This easy-to-prepare product is suitable for vegetarians.





In the Media.

➤➤➤➤➤ General Vegetable News (July–September 2013)

- A study conducted by Arizona State University found that children could be conditioned to eat vegetables they usually wouldn't by serving vegetables with cheese and peanut butter. After initial conditioning, kids were more likely to eat their vegetables plain.

Source: www.universityherald.com

- A joint venture between Perfection Fresh and Coles is launching a seasonal range of 11 vegetables called 'Hatters Vegetables'. The range provides seasonal produce with personality aimed at engaging consumers in the fresh produce section.

Source: www.theland.com.au



»»»→ Commodity News

(July–September 2013)



- Article published in Herald Sun highlighting the rising prominence of Vietnamese cuisine and Asian vegetables in major Australian cities.

Source: Herald Sun



- Most of the calories that come from Spinach are from the protein.
Source: medicalnewstoday.com
- Odd Spot: The chemist measuring the nutritional benefits of spinach accidentally printed the decimal place in the wrong spot increasing the iron value 10 times the actual amount. The inflated iron value was the premise behind the cartoon Popeye and led to a spike in Spinach sales on the idea of high iron, and therefore strength.

Source:
www.businessinsider.com.au



- Brussels Sprouts are in peak season in the winter months. When purchasing look for firm, compact and green heads.
- Brussels sprouts are a good source of Vitamin C, Potassium and Folate, which help fight diseases and cancer as well as good for the heart and blood pressure.

Source:
www.magicvalley.com/lifestyles/



- Red capsicums contain Vitamin C, Vitamin A, Vitamin B6 and fiber, all of which are great for maintaining a healthy kidney.

Source: www.timesofindia



Thanks.