Horticulture Australia and AUSVEG.

VG12078 Project Harvest.

Monthly Tracker Report Wave 2: July 2013

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Background & Methodology.

Background & Setting the Scene.

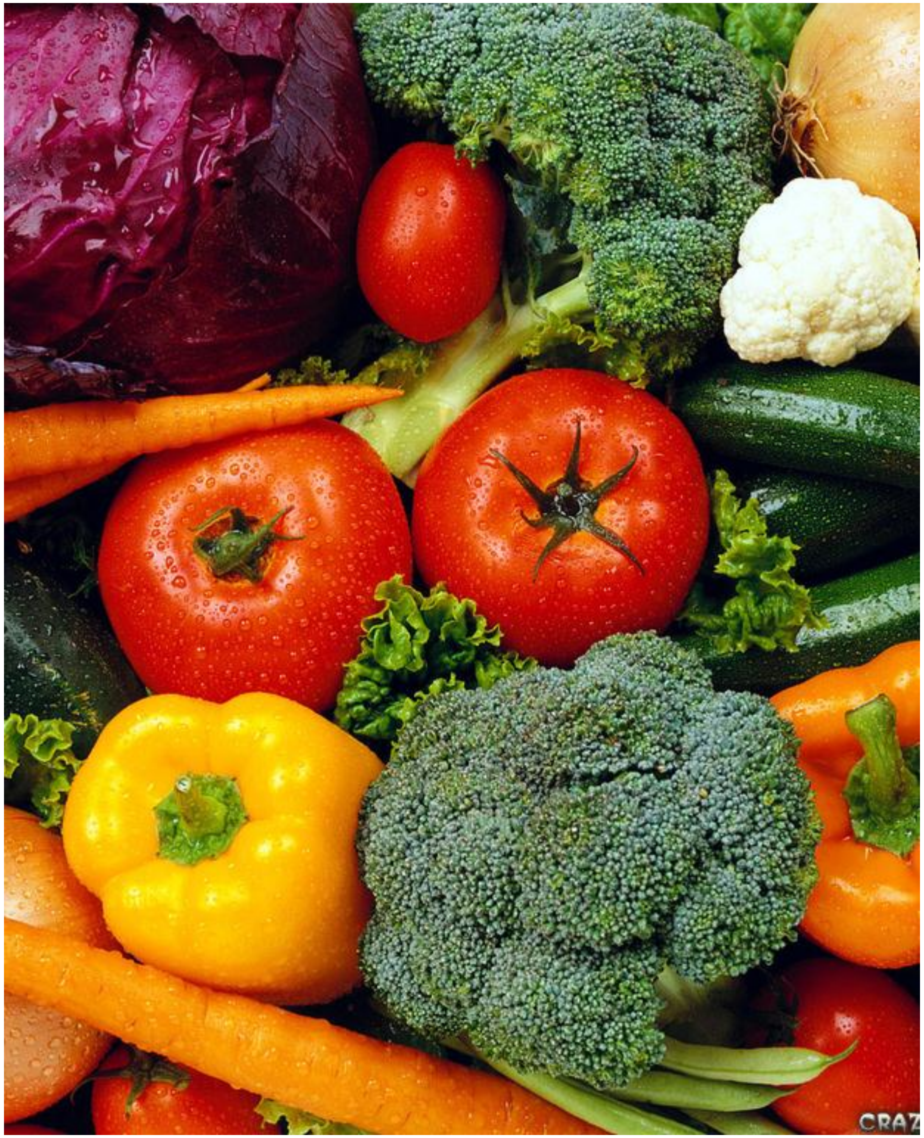
There is an increasing need in Australia's Horticulture Industry to monitor and gauge consumer perception and behaviour in relation to fresh vegetables.

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

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

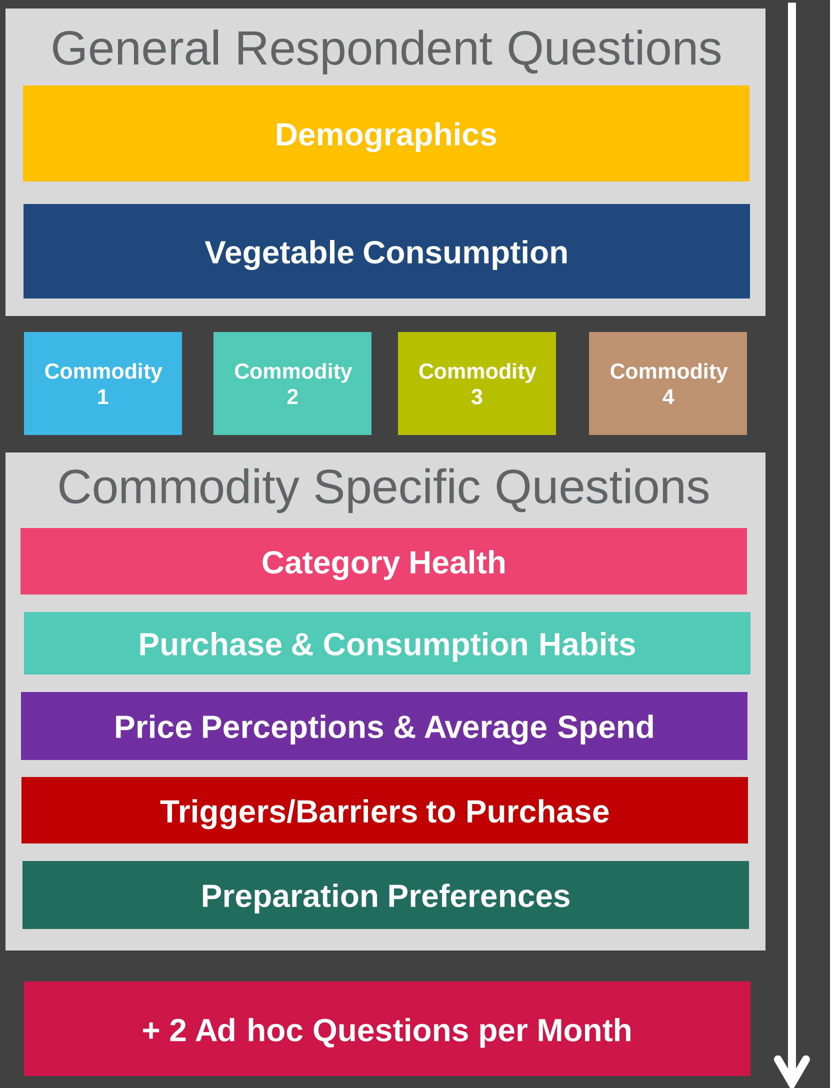
This wave's report (Wave 2, July 2013) focuses on:

- Broccoli
- Green Peas
- Lettuce
- Sweet Corn



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 per commodity.
- 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, 1,496 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 (Broccoli, Green Peas, Lettuce and Sweet Corn) within the last month
- Were the main or joint grocery buyer

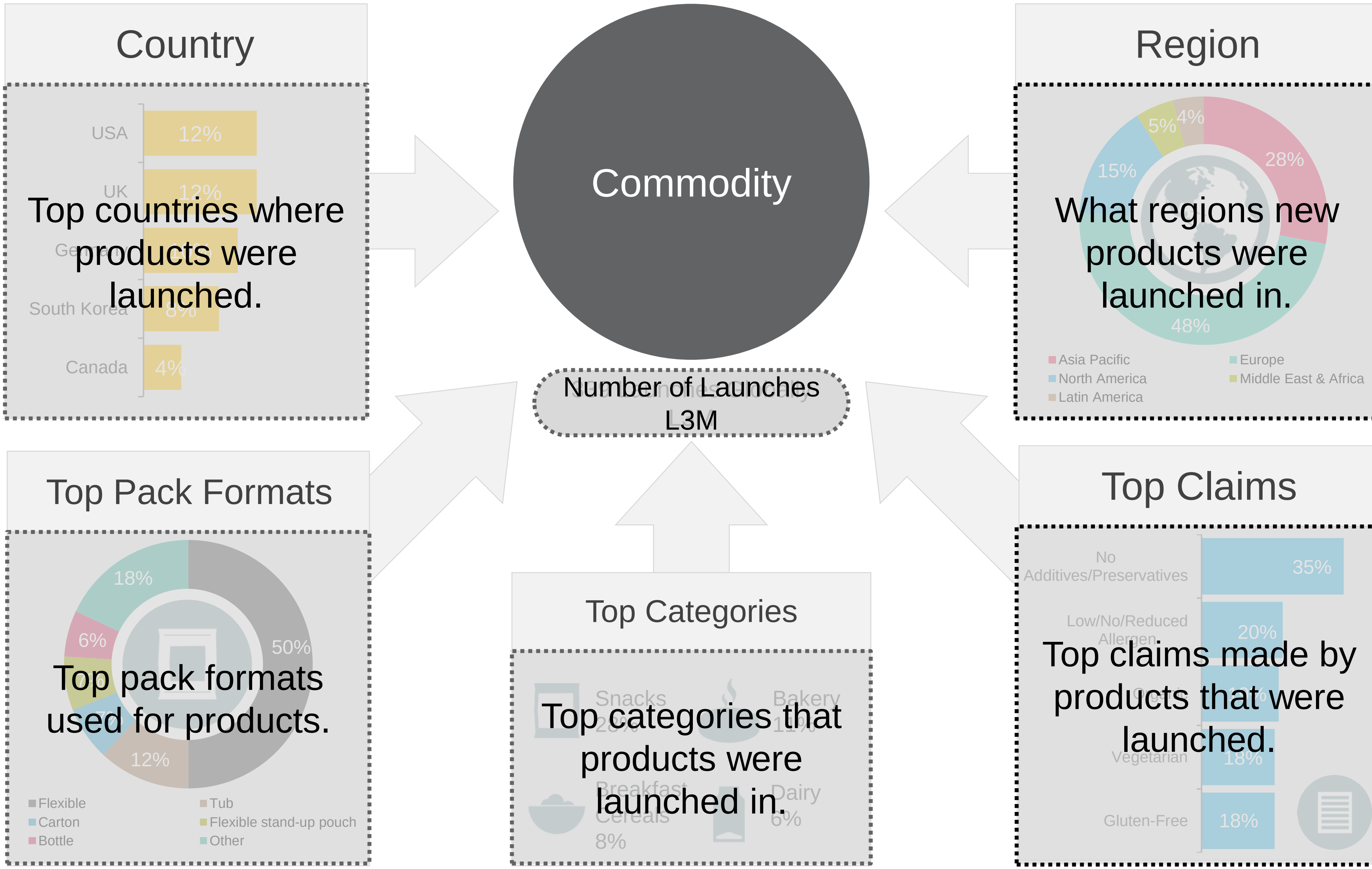
	Total N=1496	Broccoli n=525	Green Peas n=503	Lettuce n=512	Sweet Corn n=509
Gender					
Male	35%	25%	33%	25%	26%
Female	65%	75%	67%	75%	74%
Age					
18-24 y.o.	9%	12%	10%	13%	10%
25-34 y.o.	20%	22%	18%	21%	22%
35-44 y.o.	17%	16%	18%	16%	20%
45-54 y.o.	16%	14%	16%	13%	17%
55-64 y.o.	18%	16%	17%	18%	14%
65+ y.o.	21%	20%	21%	19%	17%
Household					
Single Income no Kids	23%	22%	20%	21%	17%
Double Income no kids	18%	20%	17%	17%	17%
Young Families	17%	17%	17%	16%	22%
Established Families	18%	18%	21%	20%	22%
Empty Nesters	24%	22%	25%	26%	22%
Location					
New South Wales	25%	18%	21%	18%	21%
Victoria	16%	19%	17%	19%	18%
South Australia	15%	17%	16%	16%	15%
Queensland	16%	18%	16%	18%	18%
Western Australia	14%	16%	16%	17%	18%
Tasmania	10%	6%	9%	6%	6%
Australian Capital Territory	3%	4%	3%	4%	4%
Northern Territory	1%	1%	1%	2%	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 2:
Executive Summary

Wave 2: Top 5 Insights

- Over a third of all consumers have not added any new vegetables to their cooking repertoire in the last 5 years. An opportunity exists to introduce new vegetables into the Australian market, but education on use is mandatory if these are to be embraced.
- The majority of consumers conduct weekly shops for their vegetables, expecting them to last at least a week. However, a significant proportion of consumers are unhappy with longevity of freshness. Point of sale information providing consumers with shelf life indications is likely to increase education and reduce discontent and barriers to purchase.
- Green Peas held high levels of interest and importance for consumers. Knowing the provenance of peas was particularly high. Greater advertising and point of sale information on provenance would likely increase purchase and consumption.
- Current consumer trends suggest consumers like to have knowledge of the vegetable varieties they are consuming and presenting in dishes to others. Recipe cards which indicate the variety of produce to be used (with pictorial cue card) may enhance the consumers experience and satisfaction.
- Current consumers adoption of pre-packaged formats is comparatively low. However, with key barriers to purchase being ease of use (lack of) and freshness (lack of), communication of the freshness and convenience of these formats may reduce barriers and increase purchase amongst current non-adopters of specific vegetables.

Wave 2: Fact Base
(1 of 2)

Broccoli:

- Of the vegetables tracked this month broccoli had the highest score for satisfaction.
- Those that purchased broccoli did so on average 4.2 times a month. They consumed it on average 10 times a month.
- Price of broccoli is perceived to be of good value by consumers. They typically hand pick the broccoli they purchase (typically purchasing either 1 or 2 heads). On average respondents state they purchase approx. 700g.
- Our price tracking indicates the average price for broccoli in July 2013 was $4.40 a kilo.
- Awareness of varieties of broccoli was low with 52% of respondents stating they did not know any varieties.
- On average broccoli is expected to stay fresh for at least 7 days once purchased.
- The top triggers to purchase of broccoli were health/nutrition benefits and ease of preparation/cooking. The top barriers to purchase were expensiveness and short shelf life.

Green Peas:

- Of the vegetables tracked this month green peas had the highest scores for important and interest in new varieties.
- Those that purchased green peas did so on average 3.6 times per month. They consumed them on average 9.7 times per month.
- Consumers perceived green peas to be good value for money. They typically purchased these either hand picked or in small trays. The average amount stated respondents purchase was 700g.
- Approximately half of respondents could not recall a variety of green peas. Snow, snap and garden peas were the most recalled varieties.
- On average, consumers expected green peas to stay fresh for a least 9 days once purchased.
- The top triggers to purchase were taste, health benefits and easy of cooking with. The top barriers to purchase were expensiveness and limited availability.

Wave 2: Fact Base
(2 of 2)

Lettuce:

- Of all vegetables tracked this month lettuce had the highest stated intent to increase the amount purchased in the future.
- Those that purchased lettuce did so on average 4.5 times a month. They consumed lettuce on average 13.6 times a month.
- Consumers perceived lettuce to be of moderately good value. On average they purchase 800g of lettuce per purchase occasion. Most consumers purchase whole lettuce whilst approx. 25% of consumers stated they purchase it pre-packaged whole/leaves.
- Price tracking for July 2013 states the average price for 1 unit of iceberg lettuce is $2.53.
- Awareness for varieties of lettuce was high with only 19% of respondents not recalling a variety. The most recalled varieties were Iceberg and Cos lettuce.
- On average respondents expected the lettuce they purchased to stay fresh for slightly over a week.
- The top triggers to purchase lettuce were health benefits, complimenting other foods and ease of cooking with/preparation. The top barriers to purchase were short shelf life, expensiveness & hard to store/keep.

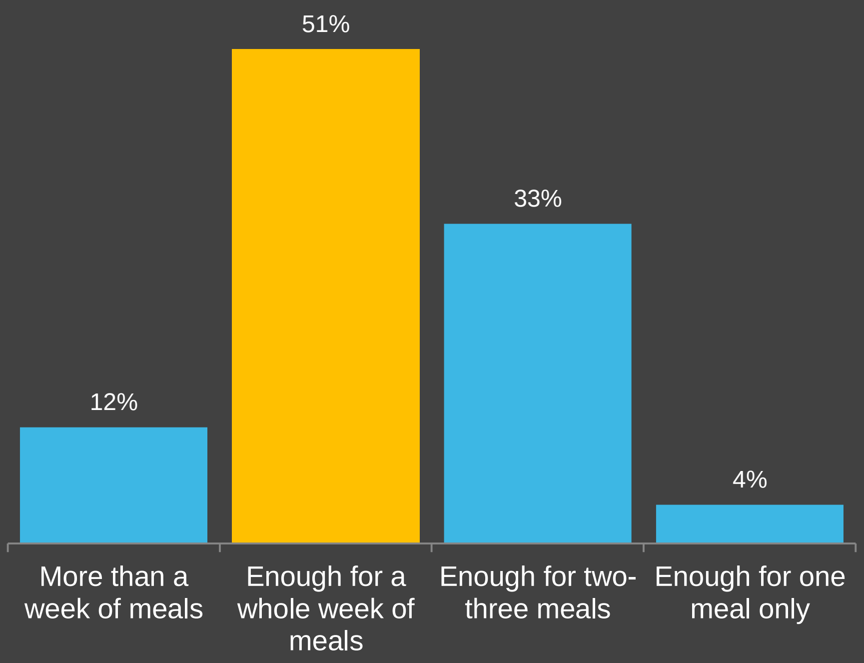
Sweet Corn:

- Sweet corn received positive scores across all category health measures (all at or above the mean for commodities tracked thus far).
- Those that purchase sweet corn did so on average 3.3 times per month. They were consumed an average 5.9 times a month.
- Consumers perceived sweet corn to be good value for money. They typically purchased them unpackaged as individual corn cobs. The average stated purchase amount for sweet corn is 800g.
- Price tracking for sweet corn in July 2013 states that the average cost per unit of a sweet corn cob is $1.05 nationally.
- Awareness of varieties of sweet corn is very low with 75% of respondents not knowing any variety.
- On average consumers expect sweet corn to stay fresh for over a week.
- The top drivers to purchase of sweet corn was taste, easy to cook/prepare with and adding variety to one's diet. The top barriers stated were expensiveness, short shelf life and limited availability.

Wave 2:
Ad-Hoc Questions

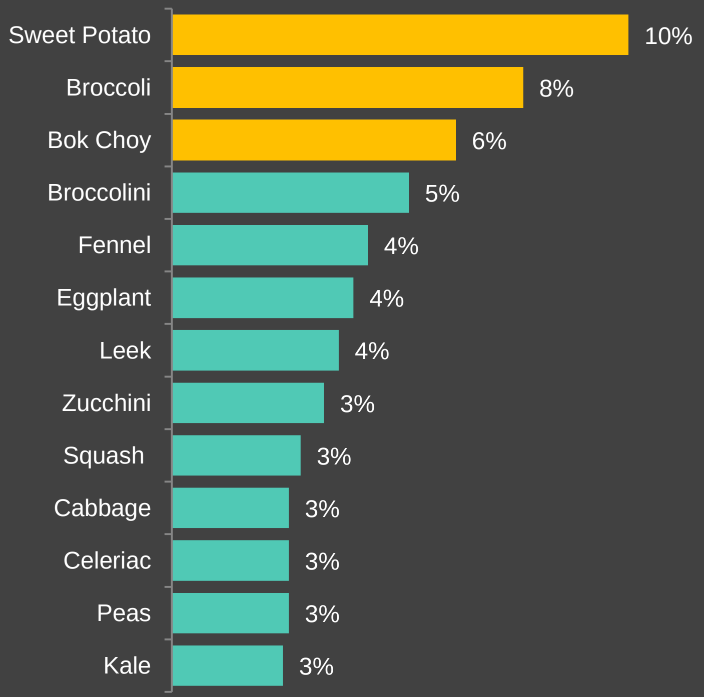
Additional Monthly Questions Asked:

Vegetable Shopping Behaviour



- Respondents stated that they typically purchase vegetables for more than one meal with the majority of respondents stocking vegetables to cook at least a weeks worth of meals.

New Vegetables in Cooking Repertoire (Last 5 years)

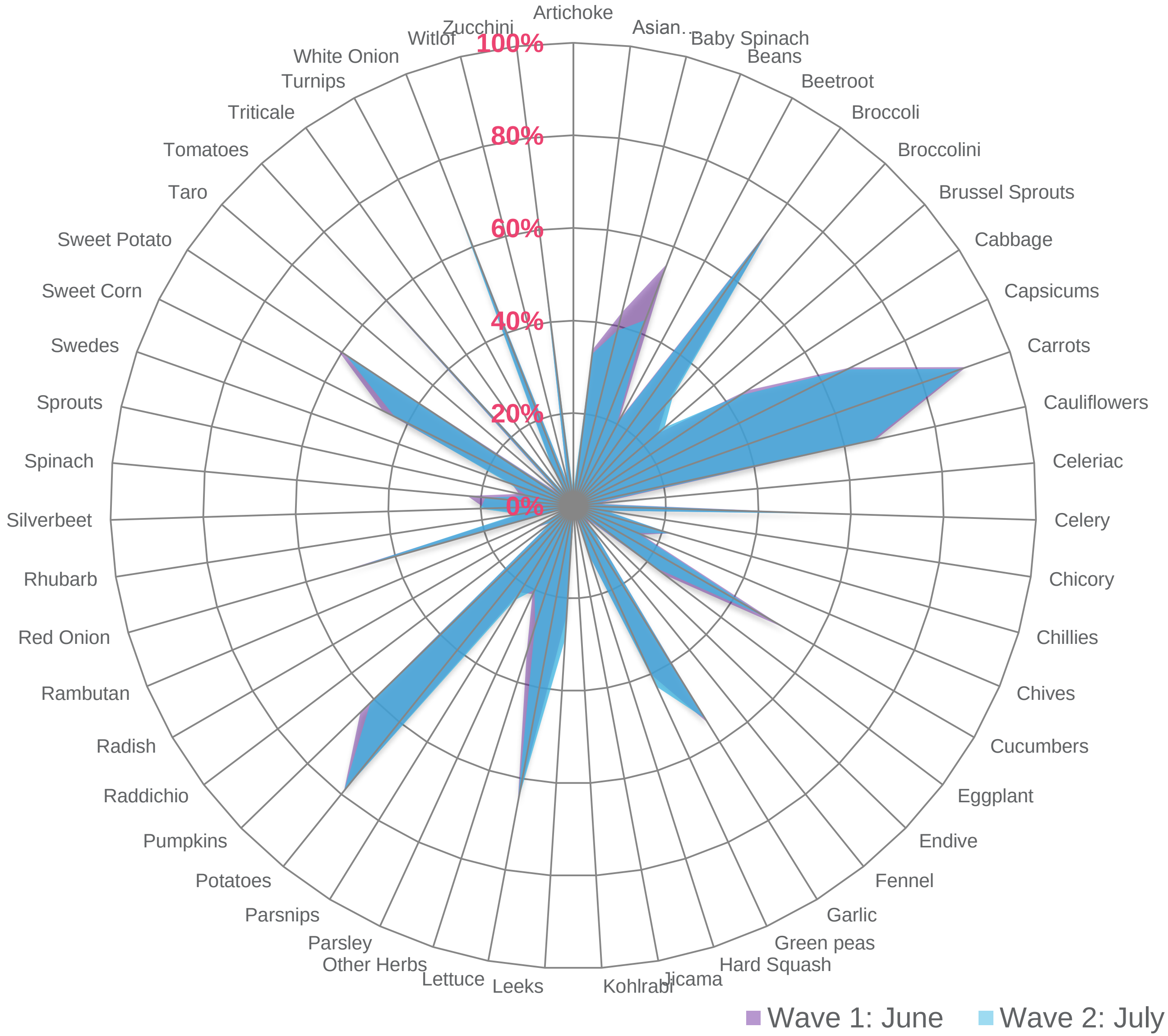


- 38% of respondents did not add any new vegetables to their cooking repertoire in the last 5 years.
- Sweet potato, followed by broccoli and bok choy were the most popular new additions to respondents cooking repertoires.

AH1. Which of the following describe your typical vegetable purchase?
AH2. In the last 5 years, what new vegetables, if any have you added to the meals that you cook at home?
Total Respondents N=1496

Wave 2: Overall Vegetable Tracking

Vegetables Purchased Last Month



- Vegetables purchased within the last month were on trend with wave 1.
- Compared to wave 1 there has been a 13% decrease in respondents who have purchased fresh beans in the last month.
- Carrots, potatoes, broccoli, cauliflower and capsicums remain as the most purchased vegetable commodities.

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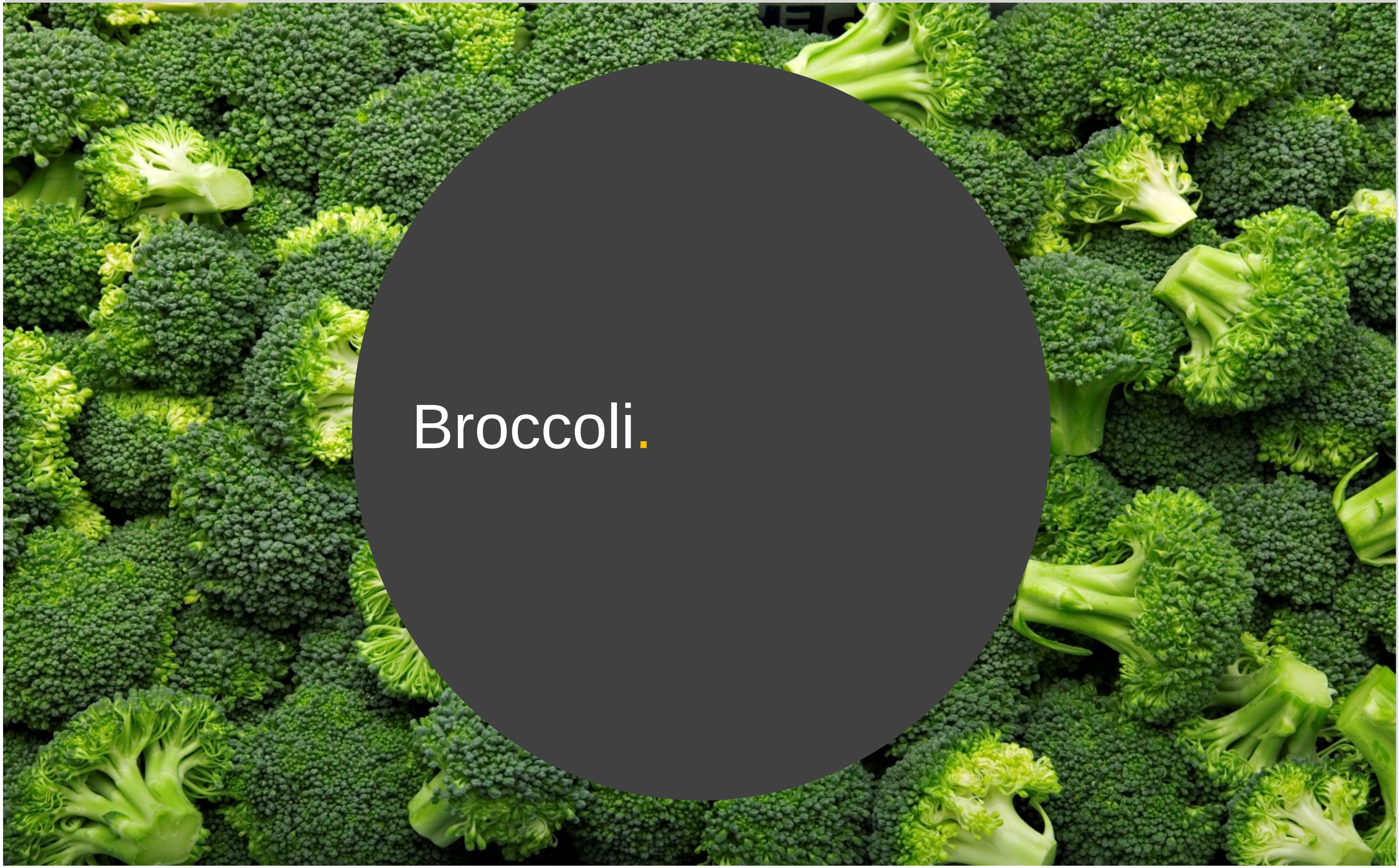
Total Sample N=1634
S8. Which of the following fresh vegetables have you purchased in the last month?

Category Health

- Of the commodities tracked this month, green peas had the highest level of importance to consumers, it also had the highest level of endorsement and interest in new varieties.
- Broccoli and lettuce had the equal highest score for satisfaction of the commodities tested.
- Of all commodities tested lettuce had the highest stated intent to increase purchase in the future (15%).
- Green peas had the highest level of interest in new varieties, whereas less interested was expressed in new varieties of broccoli.

	Broccoli	Green Peas	Lettuce	Sweet Corn	Harvest Total Mean
Importance	6.3	7.0	6.7	6.2	6.1
Satisfaction	6.8	6.5	6.8	6.6	6.6
Endorsement	7.0	7.1	6.7	7.0	6.8
Interest (New Varieties)	5.9	6.8	6.4	6.1	6.0
Future Purchase					
More	10%	13%	15%	12%	12%
Same	89%	85%	84%	86%	86%
Less	1%	2%	2%	3%	2%

CH1. How important to you is having a range of <commodity> available in the store where you usually shop?
CH2. How satisfied or dissatisfied are you with the range of <commodity> currently available?
CH3. How likely would you be to recommend <commodity> to your family and friends?
CH4. How interested or disinterested are you in new <commodity> varieties?
CH5. In the future, are you likely to buy?
Harvest Total Mean is the meal of all commodities from Wave 1, up to and including current wave.



Broccoli.

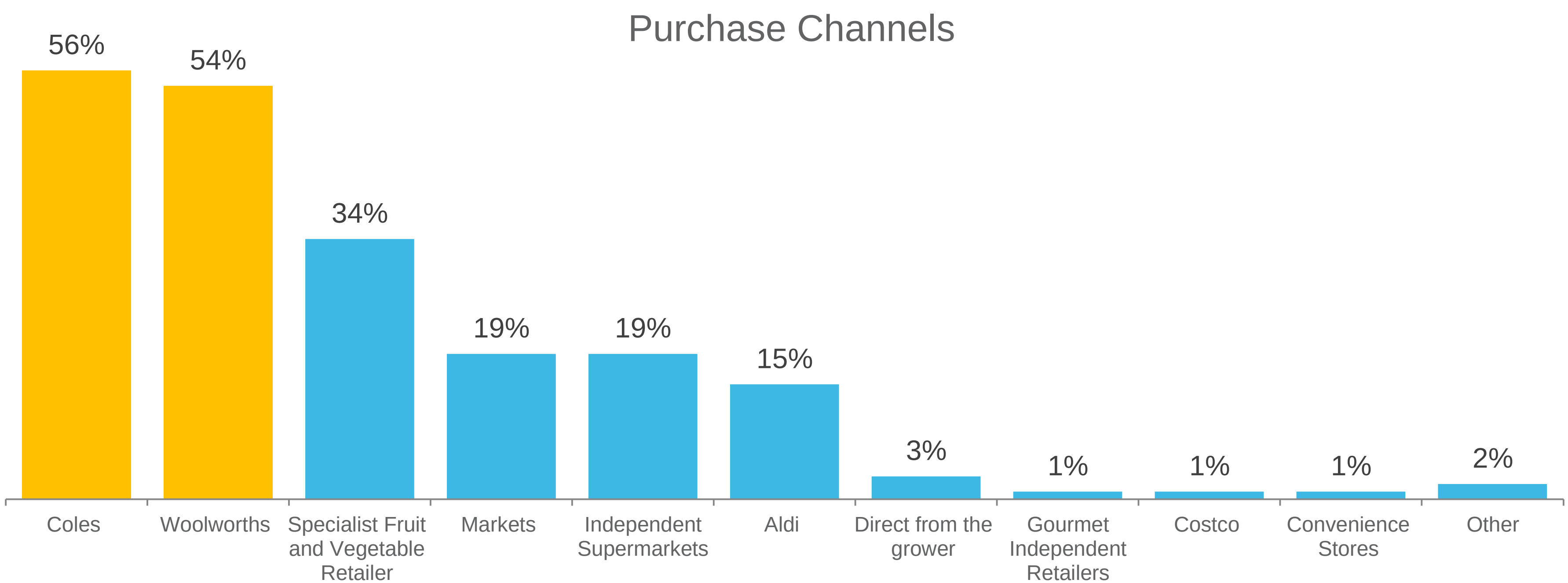
Purchase and Consumption Behaviour

Broccoli

Average Purchase **4.2** times per month

Average Consumption **10.0** times per month

- Broccoli is a high consumption vegetable commodity with consumption averaging once every 3 days and purchase averaging at least once a week.
- Mainstream retail outlets (Coles and Woolworths) are the most common purchase channels for broccoli, followed by specialist vegetable retailers.



Q1. On average, how often do you purchase <commodity>?
Q2. On average, how often do you consume <commodity>?
Q5. From which of the following channels do you typically purchase <commodity>?
Sample N=525

Average Spend & Price Sensitivity
Broccoli

⇛ The average consumer typically purchased **700g** of Broccoli.

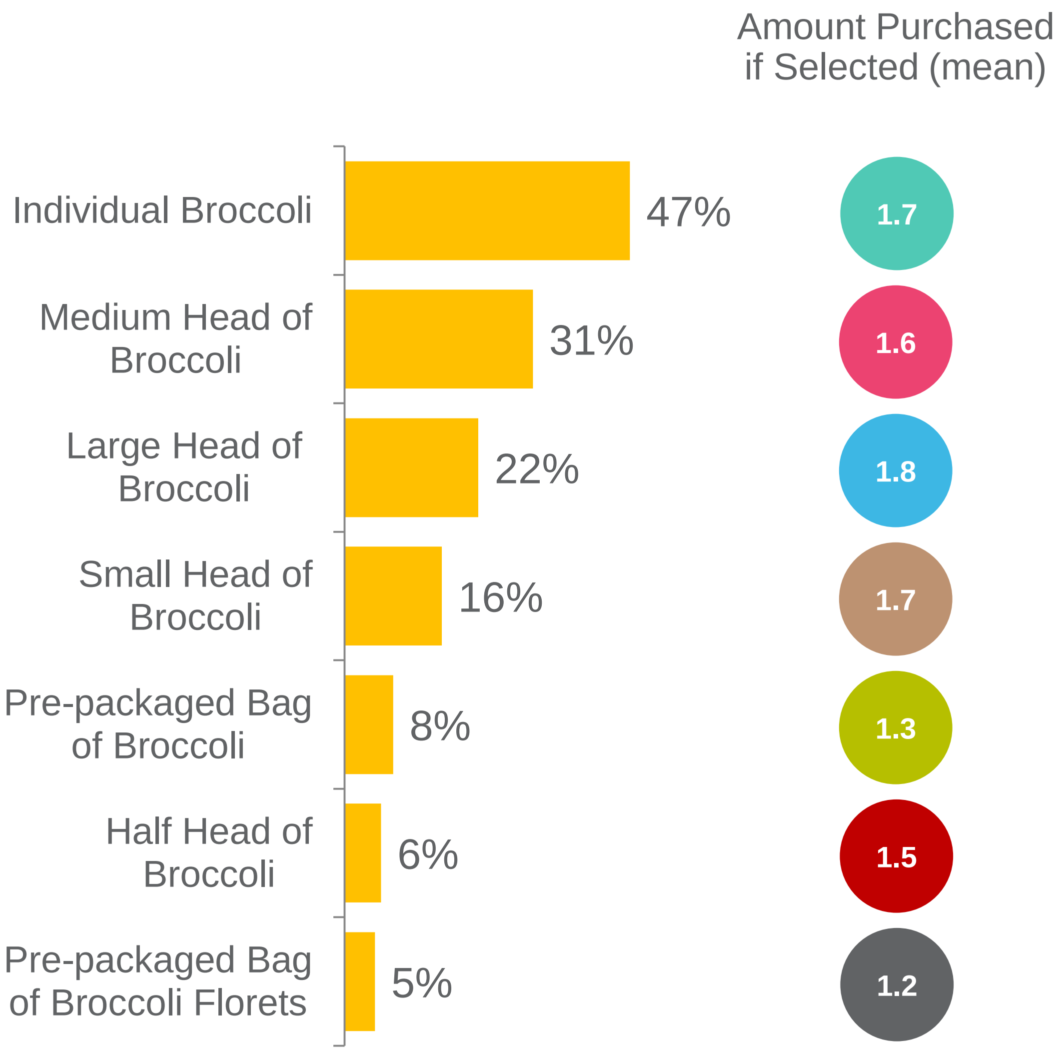
⇛ The average recalled last spend was **$3.55.**

⇛ On average, consumers perceived Broccoli to be good value **(6.5/10).**

Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)

Pack Formats Purchased

Broccoli

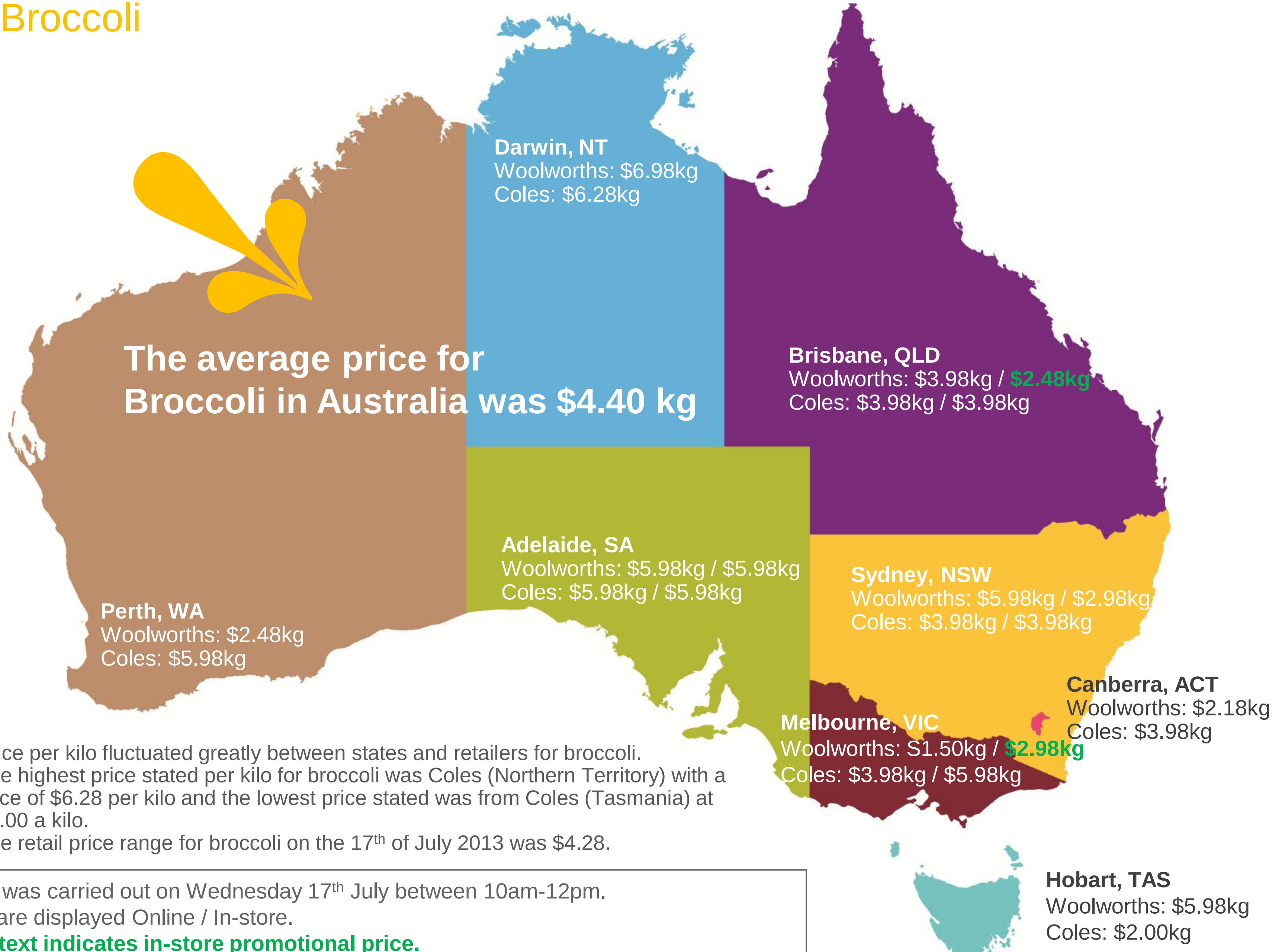


- The average amount purchased for all broccoli formats was between 1 and 2 units.
- The most common formats purchased were individual whole broccoli (medium and large head broccoli).

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

Online and In-store Commodity Prices

Broccoli



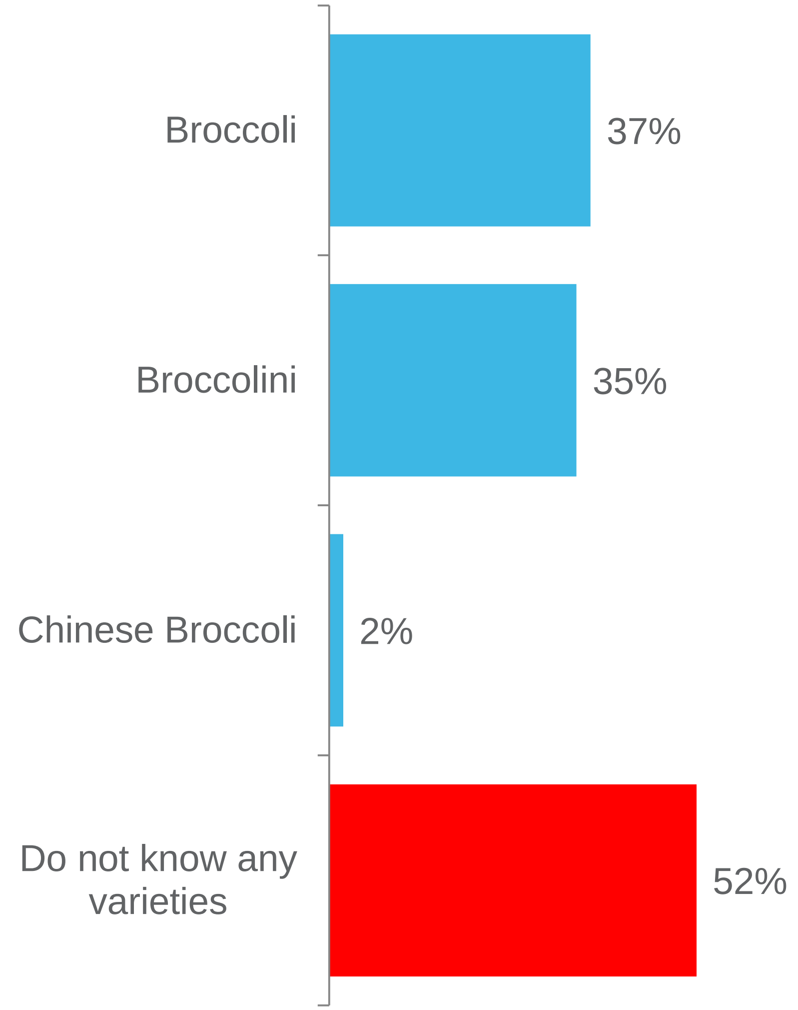
- Price per kilo fluctuated greatly between states and retailers for broccoli.
- The highest price stated per kilo for broccoli was Coles (Northern Territory) with a price of $6.28 per kilo and the lowest price stated was from Coles (Tasmania) at $2.00 a kilo.
- The retail price range for broccoli on the 17th of July 2013 was $4.28.

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

Spontaneous Varietal Awareness & Purchase

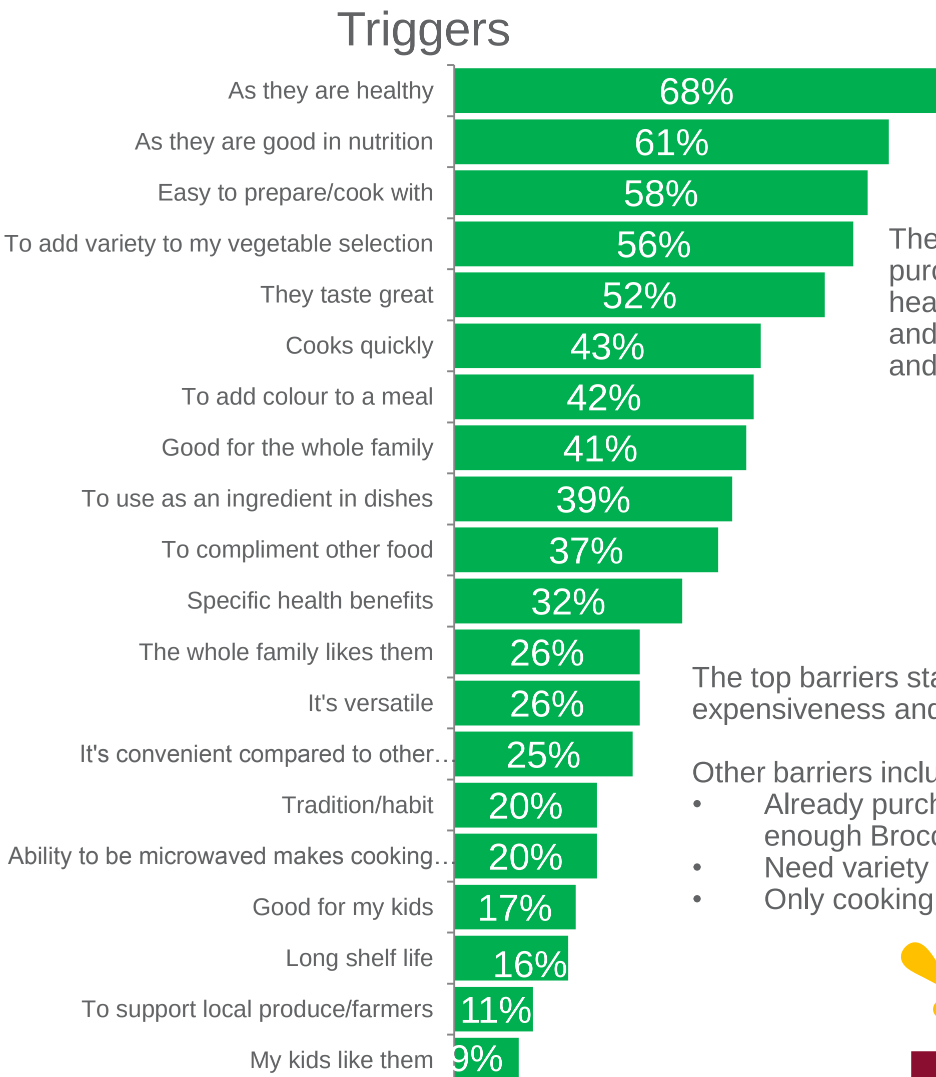
Broccoli

- Awareness of broccoli varieties was low with 52% of respondents stating they did not know of any specific variety.
- 37% of respondents stated broccoli (generic) as a specific variety of broccoli.
- Of the specific varieties of broccoli recalled broccolini had the highest awareness.



N=525
Q6a. What varieties of <commodity> are you aware of? (unprompted)

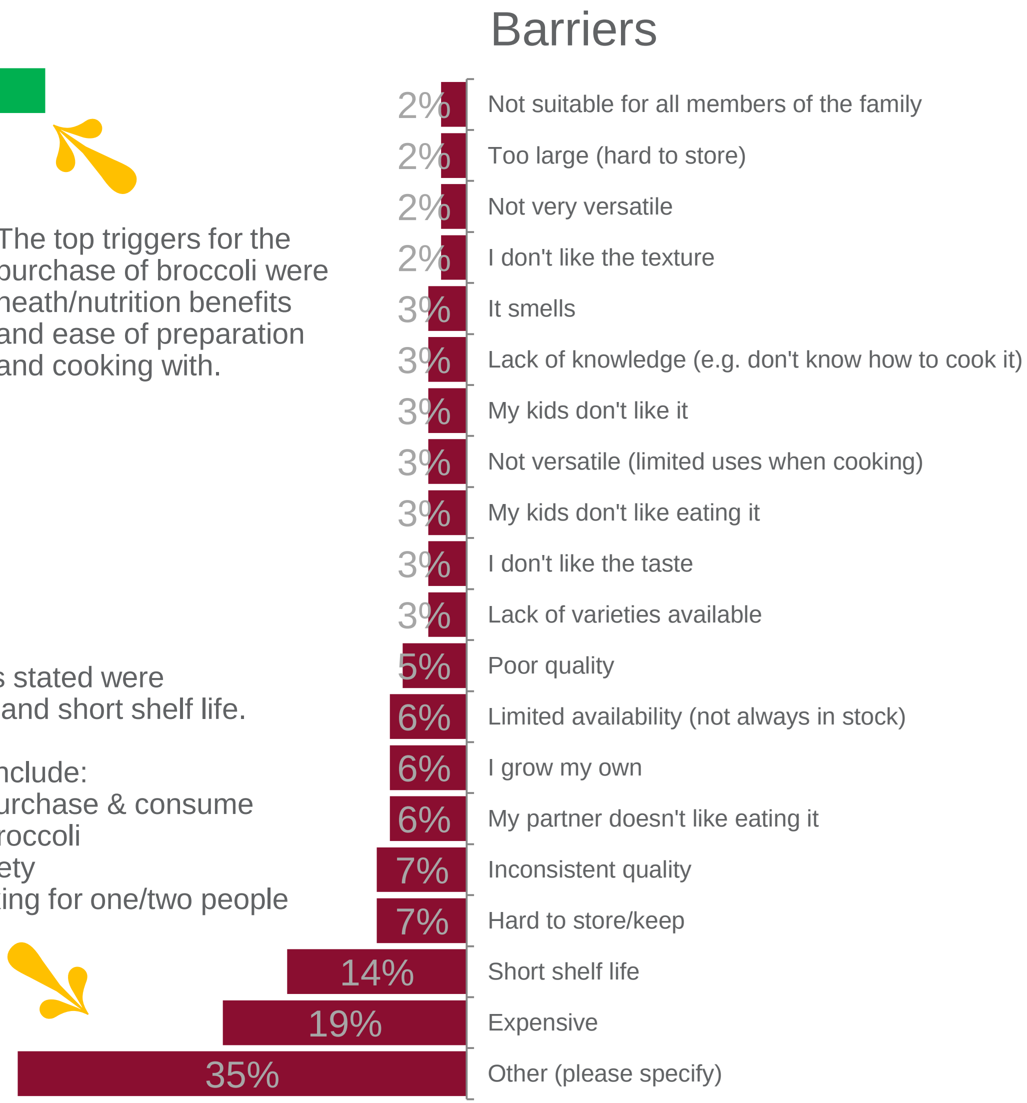
Triggers & Barriers to Purchase
Broccoli



The top triggers for the purchase of broccoli were heath/nutrition benefits and ease of preparation and cooking with.

The top barriers stated were expensiveness and short shelf life.

Other barriers include:
- Already purchase & consume enough Broccoli
- Need variety
- Only cooking for one/two people

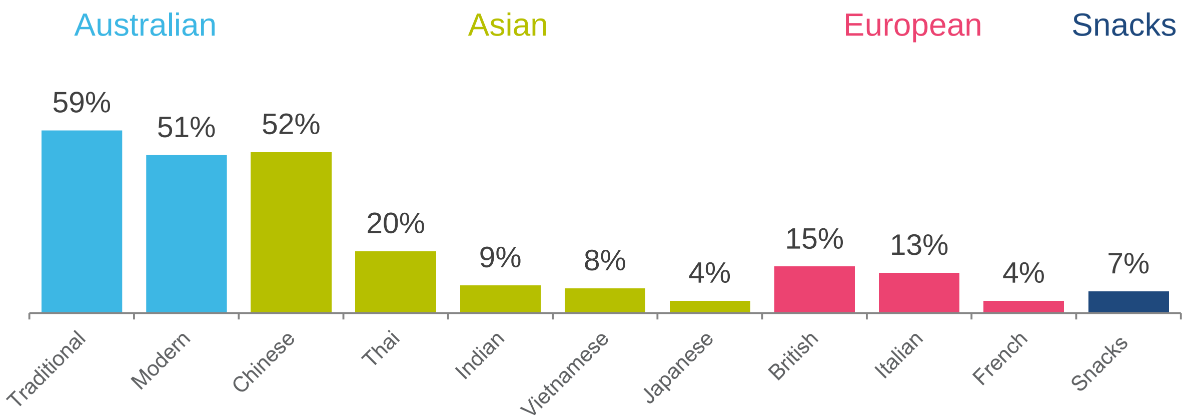


N=525
Q7. Which of the following reasons best describes why you purchase <commodity>?
Q8. Which reason best describes why you don't buy <commodity> more often?

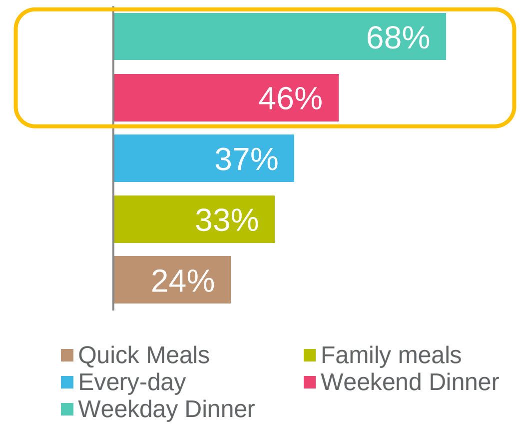
Cooking Preferences & Occasions: Broccoli

- Consumers most commonly used broccoli in Australian, traditional and Chinese cuisine.
- The most common cooking methods of broccoli were steaming, stir frying and boiling.
- Dinners were the top consumption occasions with carrots, potatoes and cauliflowers being most common accompaniments.

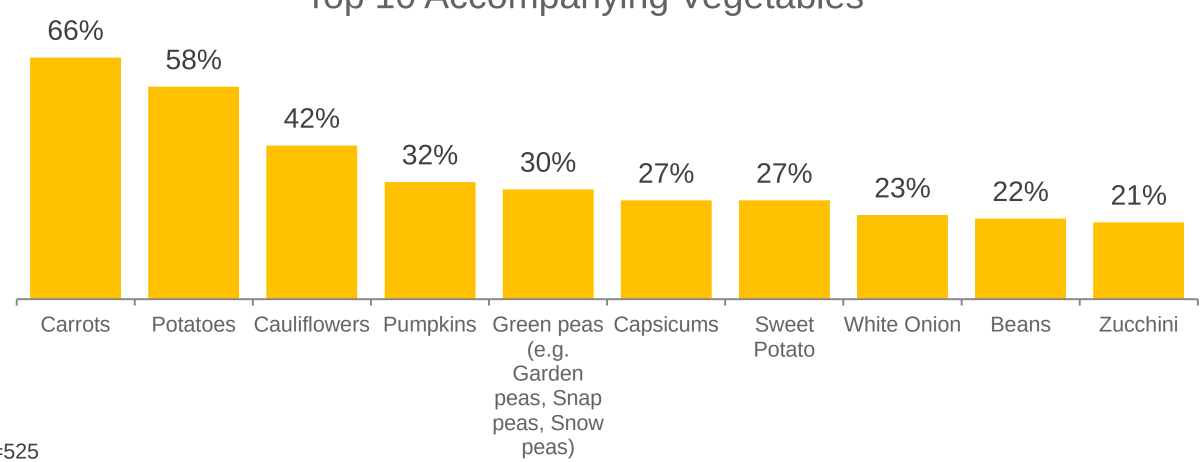
Typical Cuisine Cooked



Top 5 Consumption Occasions



Top 10 Accompanying Vegetables



Top 10 Cooking Styles	
Steaming	61%
Stir frying	49%
Boiling	37%
Microwave	32%
Soup	13%
Blanche	11%
Stewing (slow-cooking)	10%
Raw	9%
Sautéing	6%
Roasting	3%

N=525
Q9. How do you typically cook <commodity>?
Q10. What cuisines do you cook/consume that use <commodity>?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
Q11. Which of the following occasions do you typically consume/use <commodity>?

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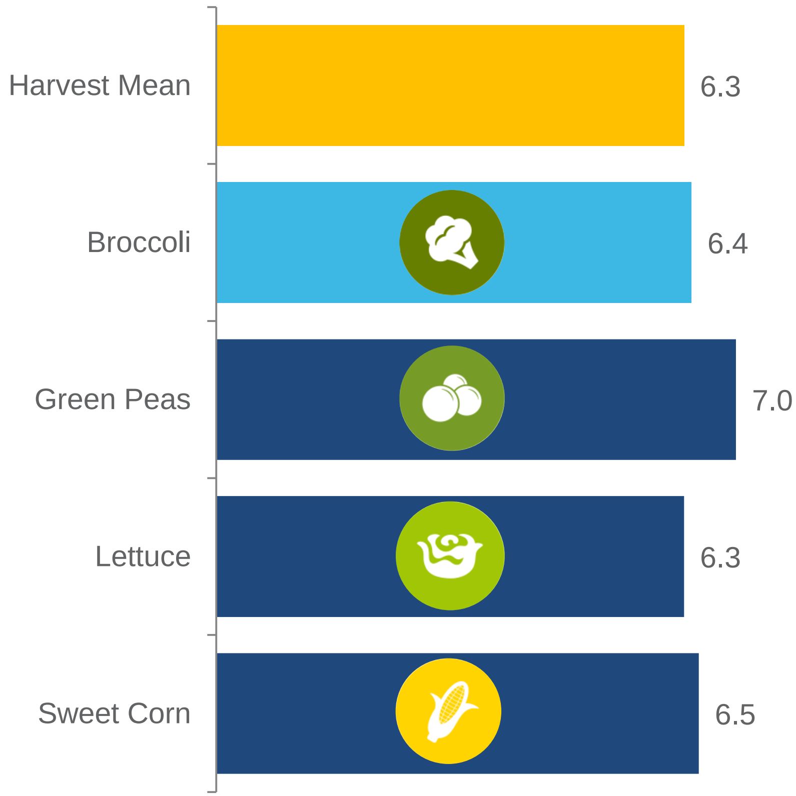
Importance of Provenance

- Provenance for broccoli was relatively important to respondents.
- It was at parity to the average of all commodities tracked thus far.



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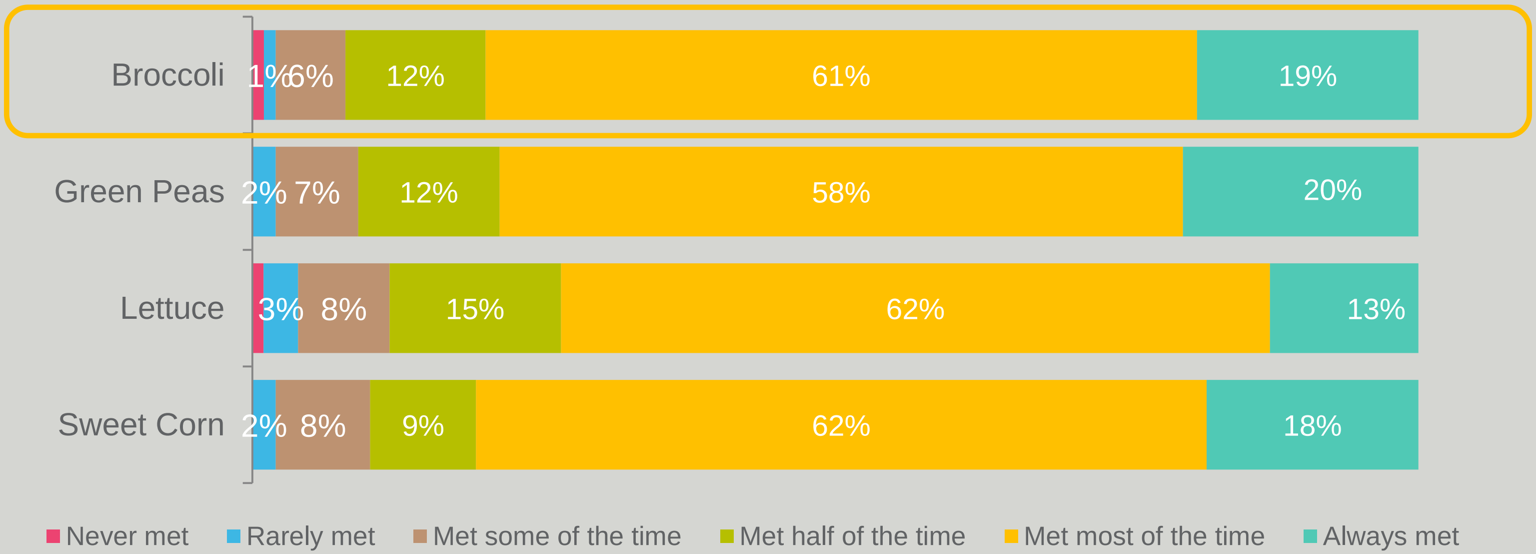
Q14. When purchasing <commodity>, how important is Provenance to you?
Broccoli N=525
Green Peas N=503
Lettuce N=512
Sweet Corn N=509

Freshness and Longevity: Broccoli

Expected to stay fresh for **7.8** days

- Respondents indicated that they expected Broccoli to stay fresh for at least 7 days once purchased.
- 19% of respondents stated freshness was always met whilst 61% stated it was met most of the time.
- 20% of respondents stated that broccoli freshness is met at best only half of the time.

Expectations Met



N=525
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> ?

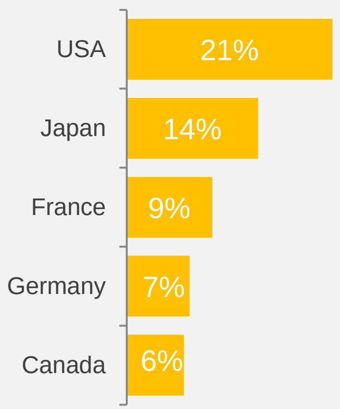
Trends: Broccoli

Broccoli Global NPDs

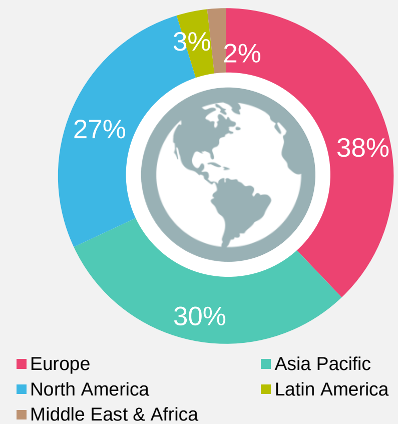
April–June 2013

There were 169 new broccoli products launched globally over the last 3 months. These launches primarily occurred in 3 regions (Europe, Asia Pacific & North America). The top categories where products were launched in were meals, fruit and vegetables and juice drinks.

Country

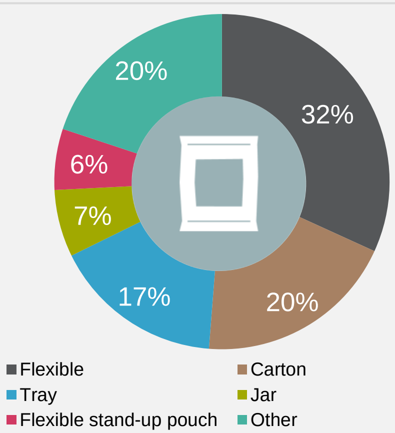


Region



169 Global NPDs

Top Pack Formats



Categories

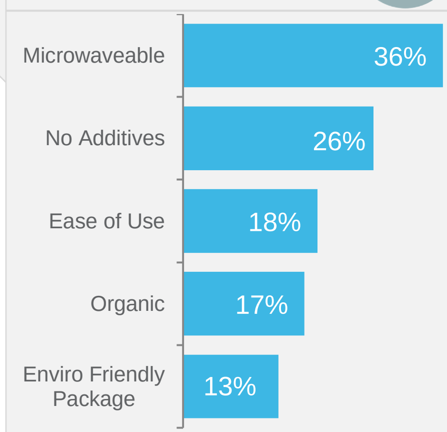
Meals 27%

Fruit & Vegetables 19%

Juice Drinks 15%

Baby Food 8%

Top Claims



Broccoli Product Launches:
Last 3 Months (April-June 2013)
Summary

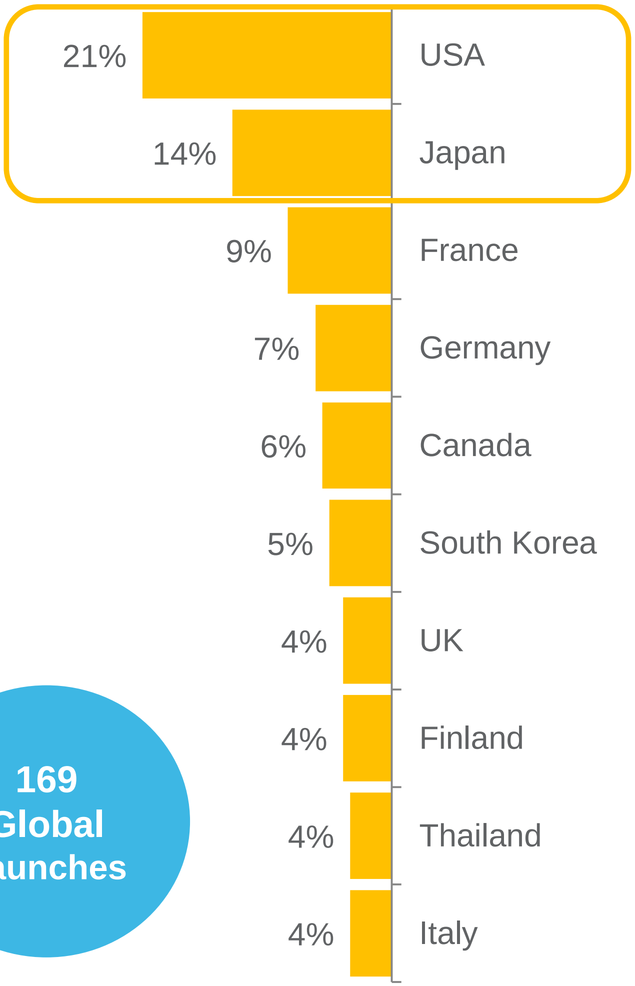
- A total of 169 products containing broccoli as an ingredient were launched globally. Only one of which 1 was launched in Australia (a vegetable and lamb stir fry mix).
- Europe, Asia Pacific & North America were the top regions for product launch (38%, 30% & 27% respectively).
- Flexible pack formats were the most used format for launches in the last 3 months (32%).
- The top categories for launches were meals (27%), fruit and vegetable goods (19%) and juice drinks (15%).
- The core claims used for launches were microwaveable (35%), no additives/preservatives (26%) and ease of use (18%).
- The most innovative launches found were broccoli SPF42 sunscreen and broccoli seeds to be used in salads (examples of these can be found in the following pages).

Source: Mintel (2013)

Broccoli Launches
Country & Categories

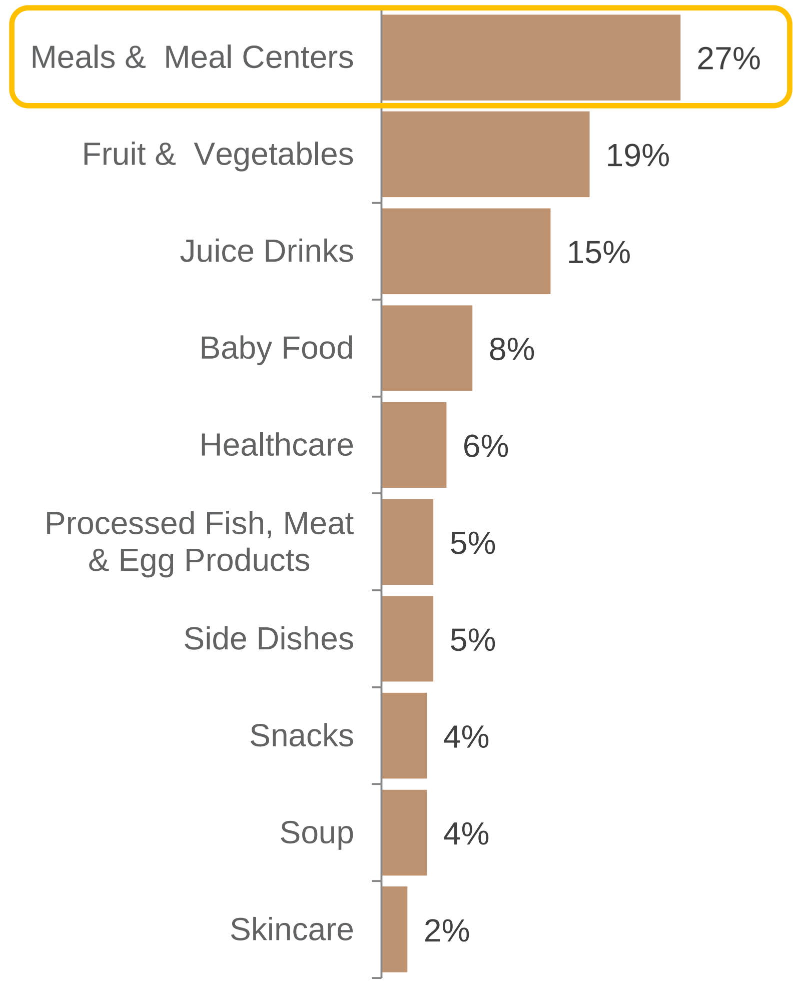
- The most active countries for launches in the last 3 months were USA and Japan.
- Meals & meal centres were the dominant categories in the last 3 months for launches.

Top 10 Launch Countries



169 Global Launches

Top 10 Launch Categories

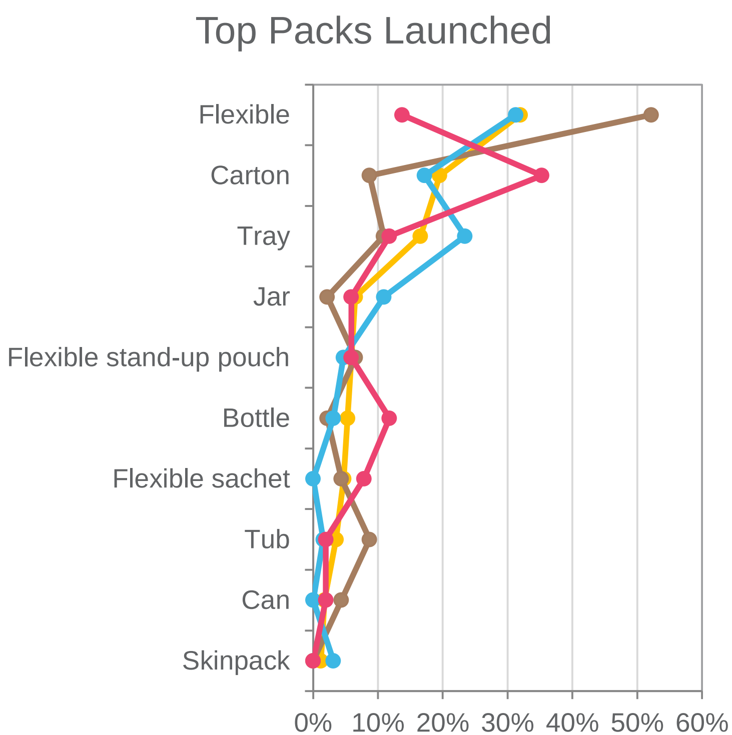


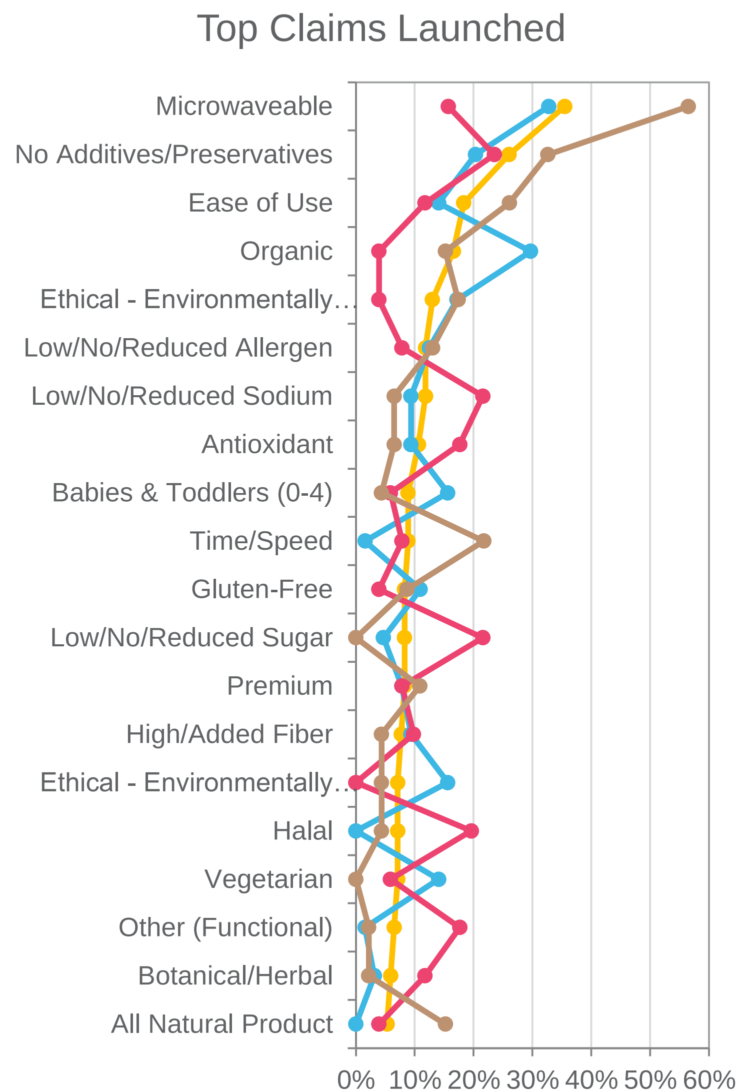
Number of Global Broccoli NPD for the L3M N=169

Broccoli Launches

Top Claims & Pack Formats Used

- Top claims for launches globally were microwavable, no additives/preservatives and ease of use.
- Flexible packaging was the top pack format used globally in the last 3 months followed by cartons and trays.





Global N=169 | Europe N=64 | Asia Pacific N=51 | North America N=46

Number of Global Broccoli NPD for the L3M N=169
Only regions with n >30 are displayed

Innovative Broccoli Launches:
L3M (April-June 2013)

Campbell's Chunky Chicken Broccoli Cheese with Potato (USA)

Campbell's Chunky Soup has been reformulated and is described as soup that eats like a meal. The microwaveable product just requires to be poured over a baked potato to make an easy and quick dinner, and retails in an 18.8-oz. recyclable can.

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

Numi Organics Savory Tea Broccoli Cilantro Decaffeinated (USA)

Numi Organics Savory Tea Broccoli Cilantro Decaffeinated Green Tea t features pungent aromas with the hearty flavors of broccoli, celery leaves and cilantro, and turmeric and decaf green tea deliver a peppery roundness.

Claims:
GMO-Free, Caffeine Free, Ethical - Environmentally Friendly Package, Kosher, Ethical - Environmentally Friendly Product, Ethical - Human, Halal, Organic, Social Media, On-the-Go

Biopharma 5 Om Dagen Fruit, Berry and Vegetable Extract (Norway)

Biopharma 5 Om Dagen Frukt-, Baer-og Gronnsaksekstrakter med C-vitamin Kosttilskudd (Fruit, Berry and Vegetable Extract with Vitamin C Dietary Supplement) contains extracts of pomegranate, broccoli, garlic, tomato and blueberry which will contribute to the five-a-day of fruit, berries and vegetables.

Claims:
Botanical/Herbal, Immune System (Functional), Antioxidant

Deluxe Potato Gratins with Broccoli (Czech Republic)

Deluxe Gratinovane Brambory (Potato Gratins with Broccoli) are said to be ideal as a side dish. This product retails in a 400g pack.

Claims:
Premium

Source: Mintel (2013)

Innovative Broccoli Launches:
L3M (April-June 2013)

Skin Food Broccoli Sun Cream SPF 42 PA+++ (Thailand)

Skin Food Broccoli Sun Cream SPF 42 PA+++ is said to offer waterproof protection against both UVA and UVB rays. It contains portulaca oleracea, aloe and camomile to help protect skin. The product retails in a 50ml pack.

Claims:
Botanical/Herbal, UV Protection, Water Resistant*

Harry's Fresh Foods Cheddar Broccoli Soup (USA)

Harry's Fresh Foods Cheddar Broccoli Soup is now formulated with more cheddar. This microwavable product is kettle cooked in small batches and contains crisp broccoli florets, fresh cream and cheddar cheese. It retails in a 16-oz. tub.

Claims:
Microwaveable

Tipco 100% Veggie Broccoli & Mixed Fruit Juice (South Korea)

Tipco 100% Veggie Broccoli & Mixed Fruit Juice is blended with green tea powder. The juice is high in fiber, vitamin A, vitamin C, vitamin E, vitamin B1 and vitamin B2. The certified halal product is free from additives and retails in a recyclable 1L pack, featuring a QR code.

Claims:
Halal, No Additives/Preservatives, Ethical - Environmentally Friendly Package, High/Added Fiber

Plum Broccoli & Apple Savoury Blend (UK)

Plum Broccoli & Apple Savoury Blend is a blend of vegetables and fruits made using organic ingredients with no preservatives, artificial additives, added salt or sugar, bulking agents or GM ingredients.

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

Source: Mintel (2013)

Innovative Broccoli Launches:
L3M (April-June 2013)

Ladykin Phytoplan Broccoli Wrinkle Radiance Power Ampoule (South Korea)

Ladykin Phytoplan Broccoli Wrinkle Radiance Power Ampoule is a special edition skincare product designed to reduce the effects of tired-looking skin and protecting it from free radicals for youthful vibrancy.The product is formulated with broccoli extract and a berry complex for anti-wrinkle, whitening, lifting, soothing, moisturising and toning actions.

Claims:
No Additives/Preservatives, Paraben Free, Botanical/Herbal, Whitening, Toning*, No Animal Ingredients, Antioxidant, Moisturising / Hydrating, Anti-Ageing, Reduces Fine Lines / Wrinkles*, Limited Edition

Nestlé P'tit Pot Mini Broccolis Savoury Meal (France)

Nestlé P'tit Pot Les Minis Brocolis (Mini Broccolis Savoury Meal) contains no added salt and is free from preservatives. This microwaveable product is suitable for babies from six months of age and retails in a 160g pack containing 2 x 80g jars, featuring a recipe suggestion.

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

Reser's Fine Foods Sensational Sides Broccoli Cheese Rice (USA)

Reser's Fine Foods Sensational Sides Broccoli Cheese Rice has been repackaged with an updated design. The product is made with broccoli florets and real cheese, including cheddar and American cheese. This microwaveable side is ready to serve in four minutes and retails in a 22-oz. pack that provides four servings

Claims:
Microwaveable

Germline Germinating Broccoli Seeds (France)

Germ'line Graines a Germer Brocoli (Germinating Broccoli Seeds) are said to feature subtle fragrances, to possess germinative and nutritious properties, and to be ideal to accompany salads.These seeds are rigorously selected and controlled for quality. The organic certified product retails in a 150g pack.

Claims:
Organic

Source: Mintel (2013)

Green Peas.

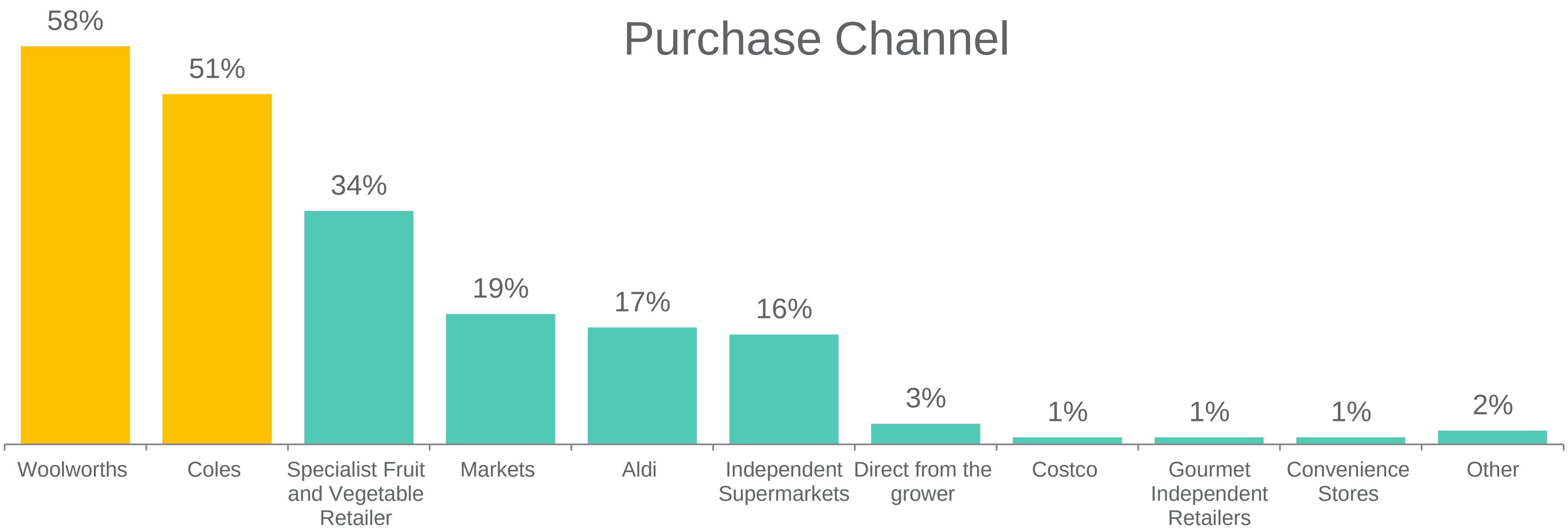
Purchase and Consumption Behaviour

Green Peas

Average Purchase **3.6** times per month

Average Consumption **9.7** times per month

- Similar to other commodities tracked, green peas were most commonly purchased through mainstream retail channels (e.g. Coles & Woolworths).
- Over a third of respondents purchase green peas through specialist vegetable retailers.
- Respondents indicated they consume green peas over 9 times per month and purchase them on average 3.6 times a month.



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 N=503

Average Spend & Price Sensitivity
Green Peas

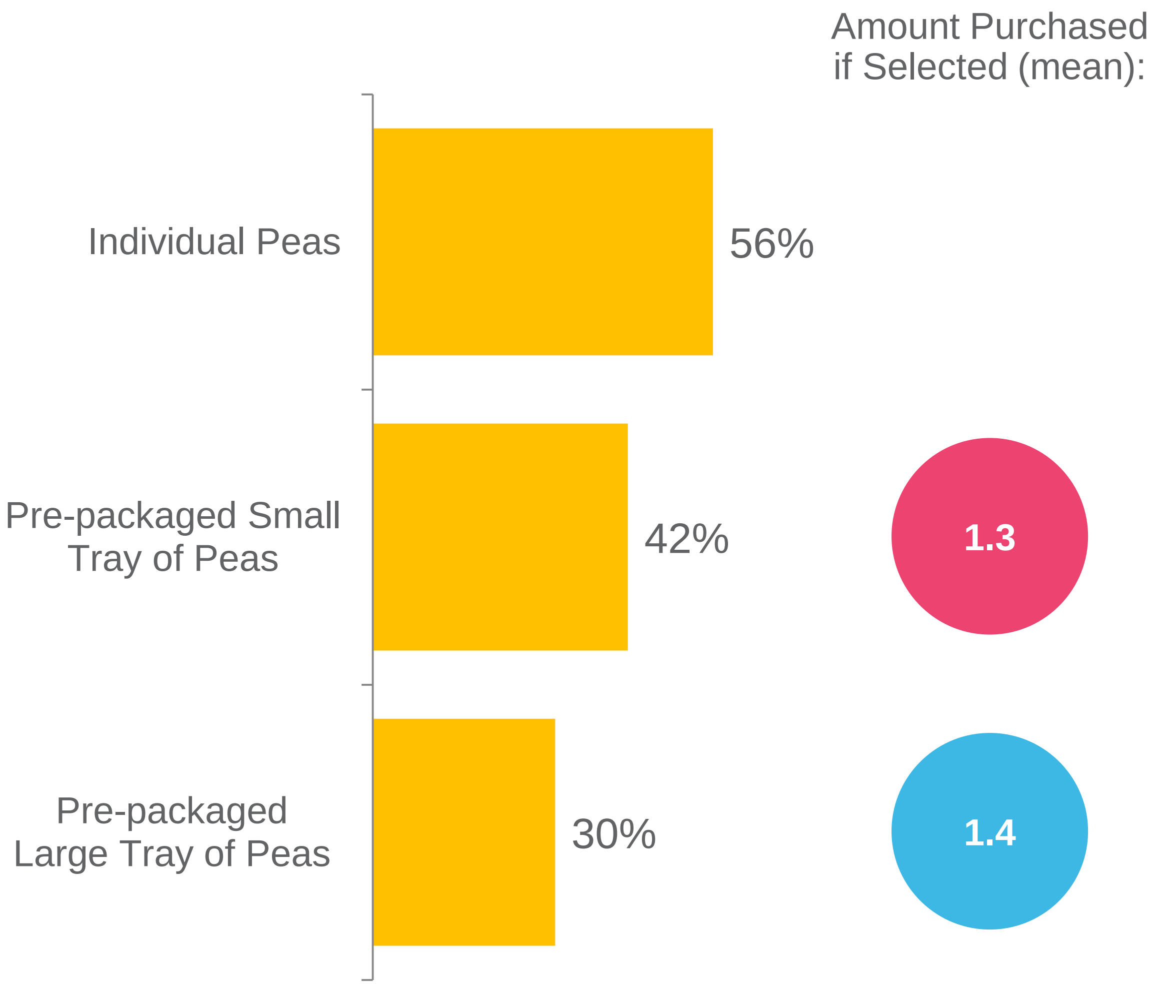
⇛ The average consumer typically purchased **700g** of Green Peas.

⇛ The average recalled last spend on Green Peas was **$3.94.**

⇛ Consumers perceived the average price for Green Peas as good value for money **(6.4/10).**

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

Pack Formats Purchased
Green Peas

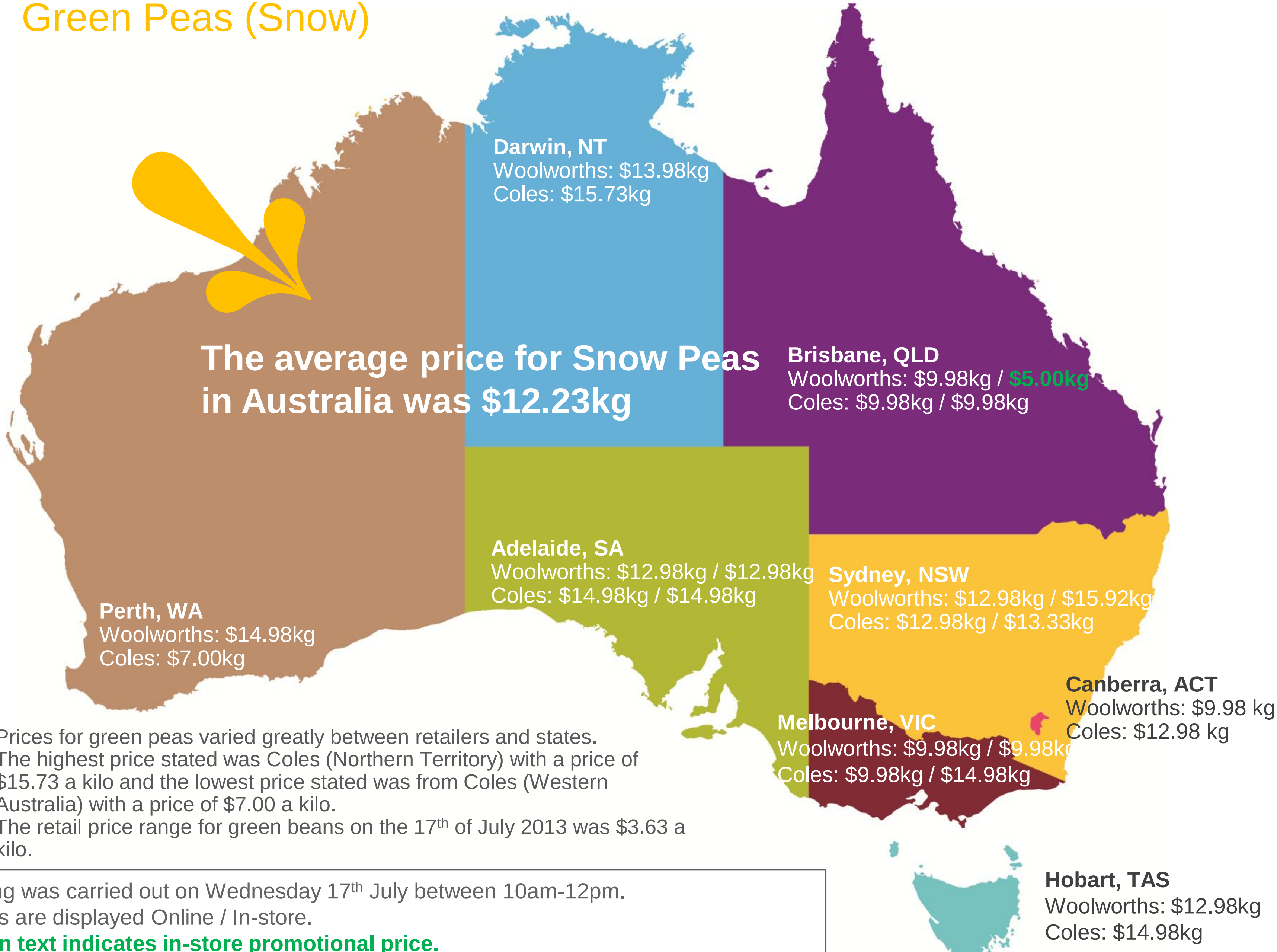


- The most common format to purchase fresh green peas was individually (scooped into bags).
- Respondents typically purchased 1-2 trays of green peas if they purchase them pre-packaged.

colmar brunton.

Online and In-store Commodity Prices

Green Peas (Snow)



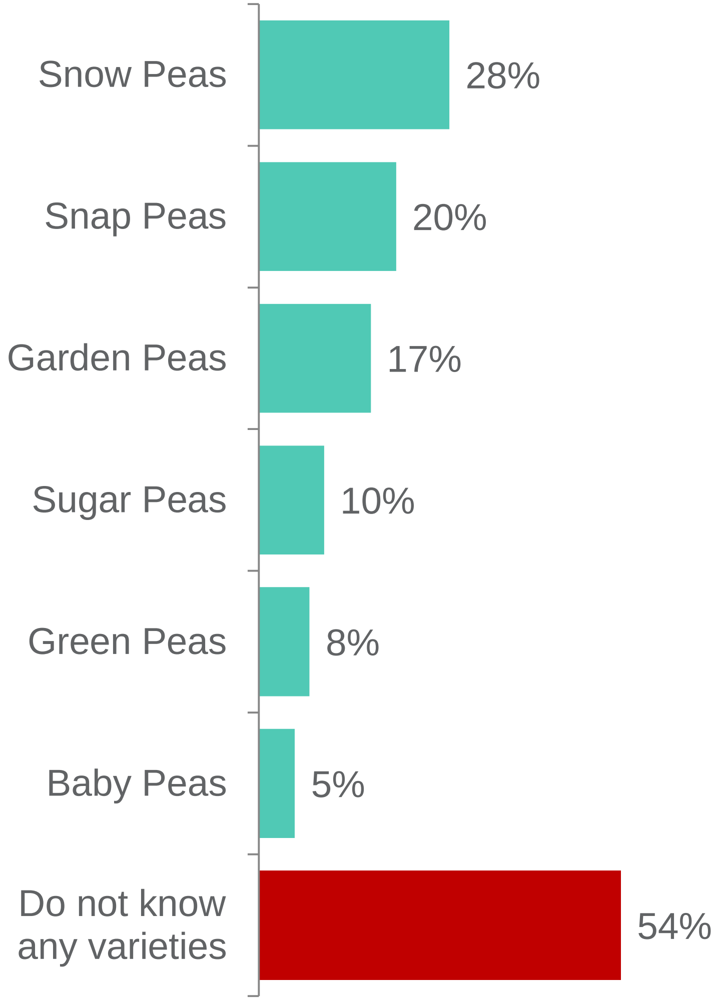
- Prices for green peas varied greatly between retailers and states.
- The highest price stated was Coles (Northern Territory) with a price of $15.73 a kilo and the lowest price stated was from Coles (Western Australia) with a price of $7.00 a kilo.
- The retail price range for green beans on the 17th of July 2013 was $3.63 a kilo.

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

Spontaneous Varietal Awareness & Purchase

Green Peas

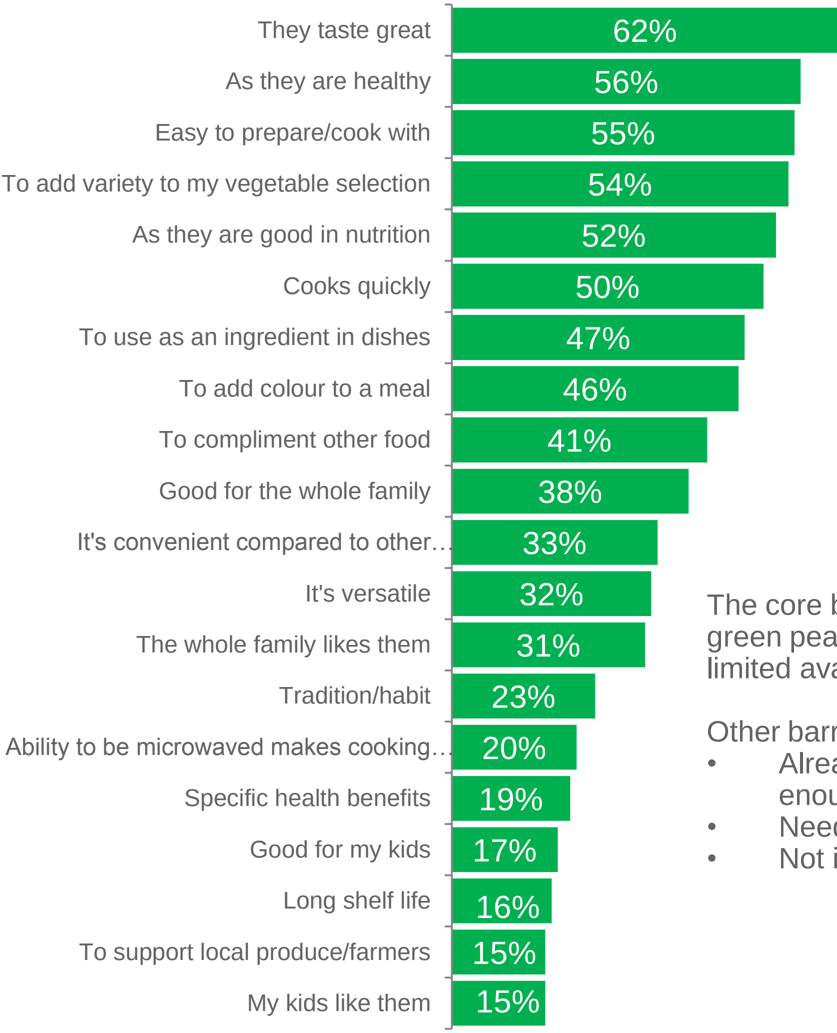
- 54% of respondents could not recall a variety of green pea they were aware of.
- Snow peas, snap peas and garden peas were the varieties of green pea that had the highest levels of awareness.



N=503
Q6a. What varieties of <commodity> are you aware of? (unprompted)

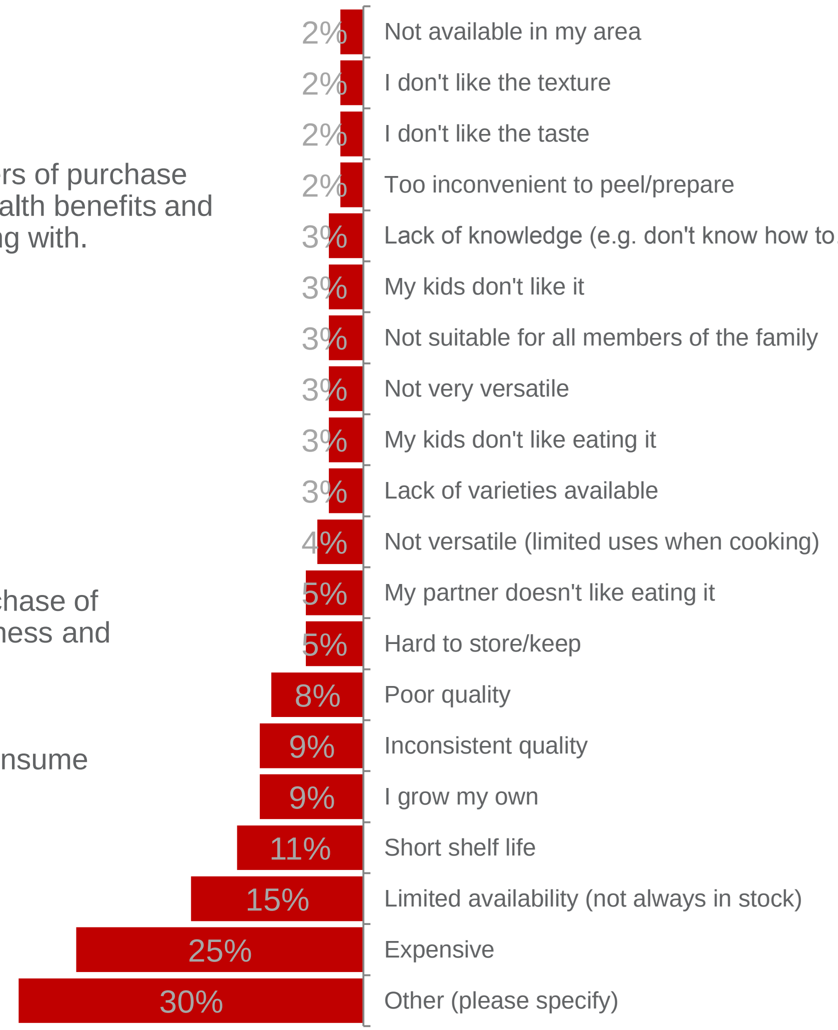
Triggers & Barriers to Purchase
Green Peas

Triggers



The core drivers of purchase were taste, health benefits and ease of cooking with.

Barriers



The core barriers to the purchase of green peas were expensiveness and limited availability.

Other barriers stated were:

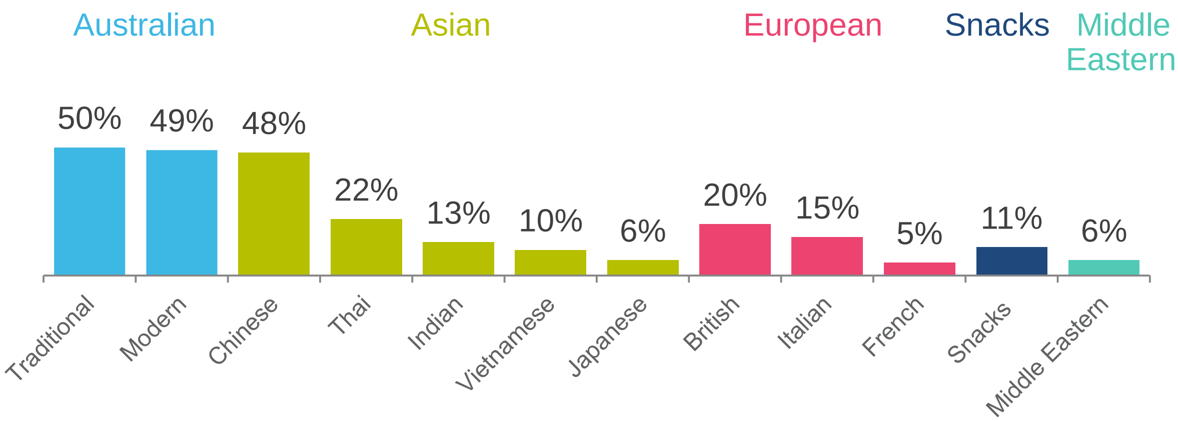
- Already purchase & consume enough Green Peas
- Need variety
- Not in season

N=503
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?

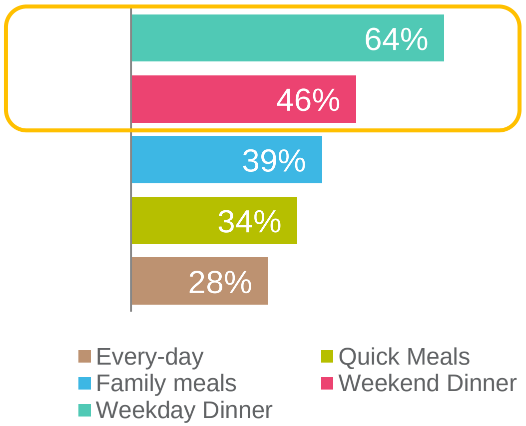
Cooking Preferences & Occasions: Green Peas

- Respondents stated they most commonly used green peas in Australian and Chinese cuisine. European and Thai cuisine were also common cuisines that respondents used green peas for.
- Stir frying, steaming and boiling were the top cooking formats.
- Dinner was the highest stated consumption occasion for green peas.
- The top vegetable commodities that accompany green peas were carrots, potatoes and cauliflower.

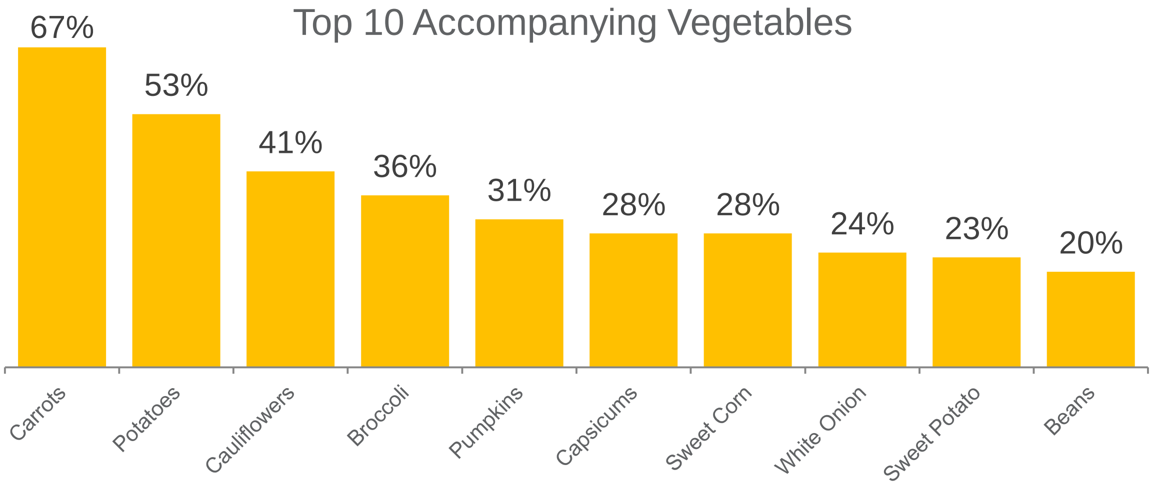
Typical Cuisine Cooked



Top 5 Consumption Occasions



Top 10 Accompanying Vegetables



Top 10 Cooking Styles	
Stir frying	49%
Steaming	47%
Boiling	44%
Microwave	28%
Raw	24%
Soup	17%
Stewing (slowcooking)	12%
Frozen	12%
Blanche	11%
Sautéing	6%

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

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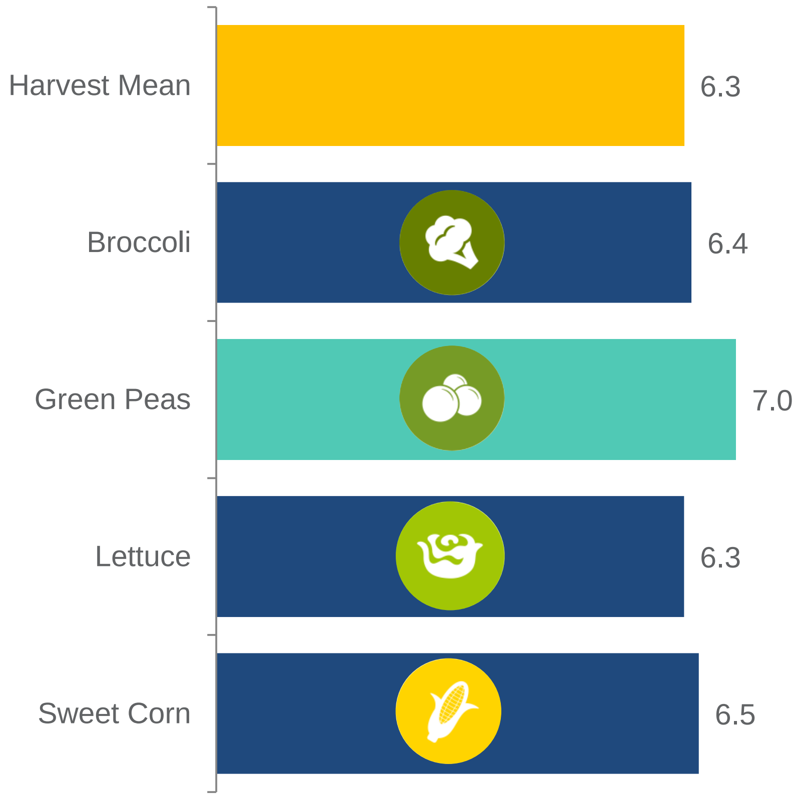
Importance of Provenance

⇛ Of all commodities tested in both wave 1 and 2, green peas has the highest stated importance for provenance with a score of 7.0/10.



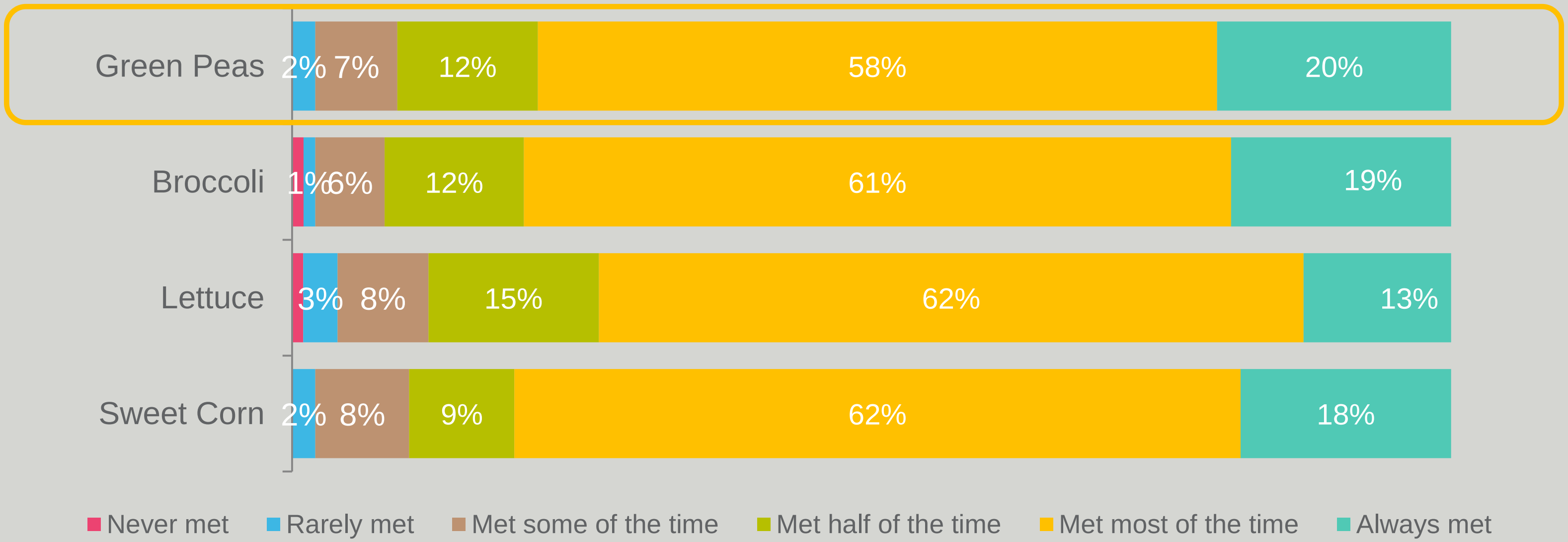
Q14. When purchasing <commodity>, how important is Provenance to you?
Broccoli N=525
Green Peas N=503
Lettuce N=512
Sweet Corn N=509

Freshness and Longevity: Green Peas

Expected to stay fresh for **9.7** days

- Respondents indicated that they expected green peas to stay fresh for at least 9 days once purchased.
- 20% of respondents stated freshness was always met whilst 58% stated it was met most of the time.
- 21% of respondents stated that green pea freshness is met at best only half of the time.

Expectations Met



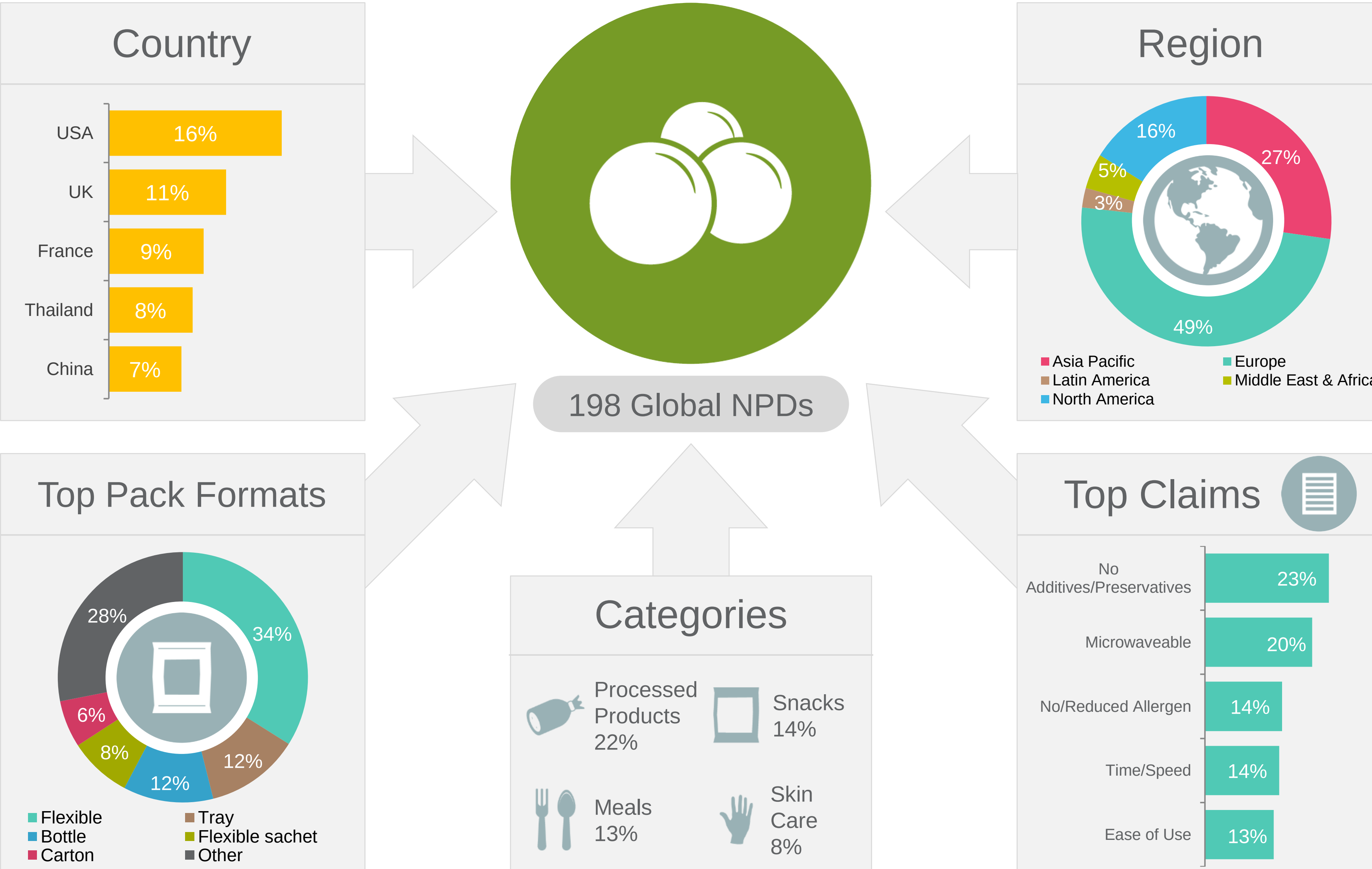
N=503
Q12. How long do you expect <commodity> to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy <commodity> ?

Trends:
Green Peas

**Pea was the search term in Mintel*

Green Peas Global NPDs
April–June 2013

There were 198 new products launched in the last 3 months that used green peas as an ingredient. The majority of these launches were in Europe and Asia Pacific regions. The top categories products were launched in were processed food products, snacks and meals.



Green Peas Product Launches:
Last 3 Months (April-June 2013)
Summary

- A total of 198 products have been launched in the last 3 months globally contained green peas as an ingredient. None of these launches were in Australia.
- Europe & Asia Pacific regions were the top 2 locations for launches, 49% & 27% respectively.
- Flexible packaging was the most used pack format for launches in the last 3 months (34%).
- Top categories for launches were processed products (22%), snacks (14%) and meals (13%).
- The core claims used globally for launches were no additives/preservatives (23%), microwaveable (20%) and low/no/reduced allergens (14%).
- The most innovative launches found were hair conditioner containing green peas, green pea tea and an apple, banana, cucumber and pea juice beverage (examples of these can be found in the next slides).

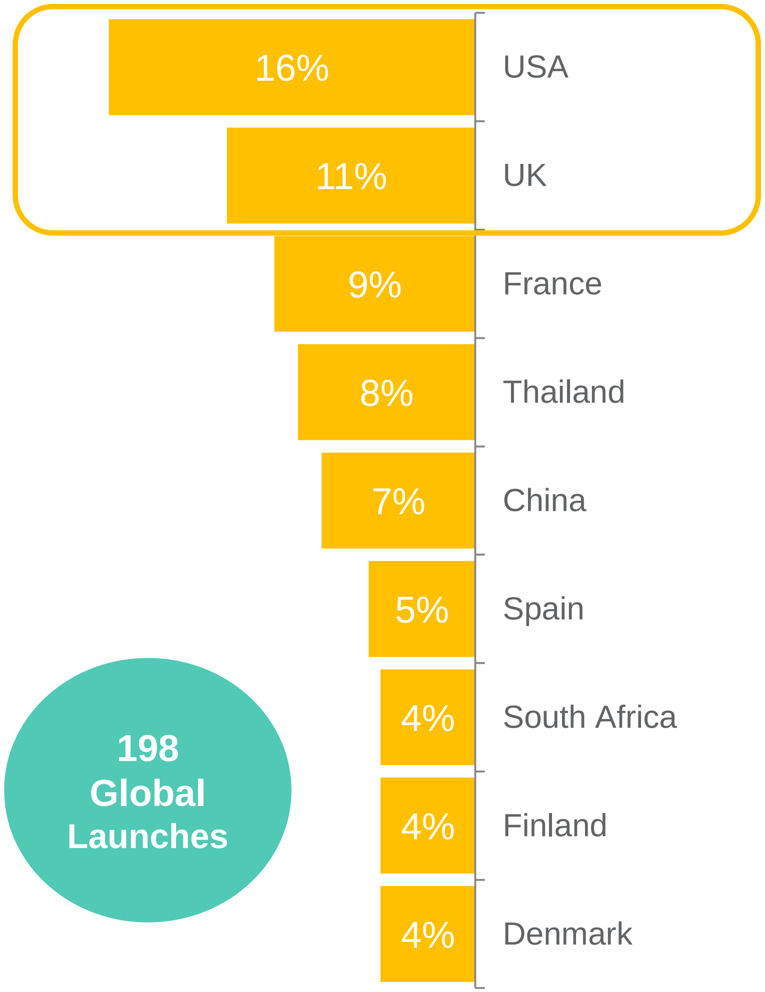
Source: Mintel (2013)

Green Peas SKUs

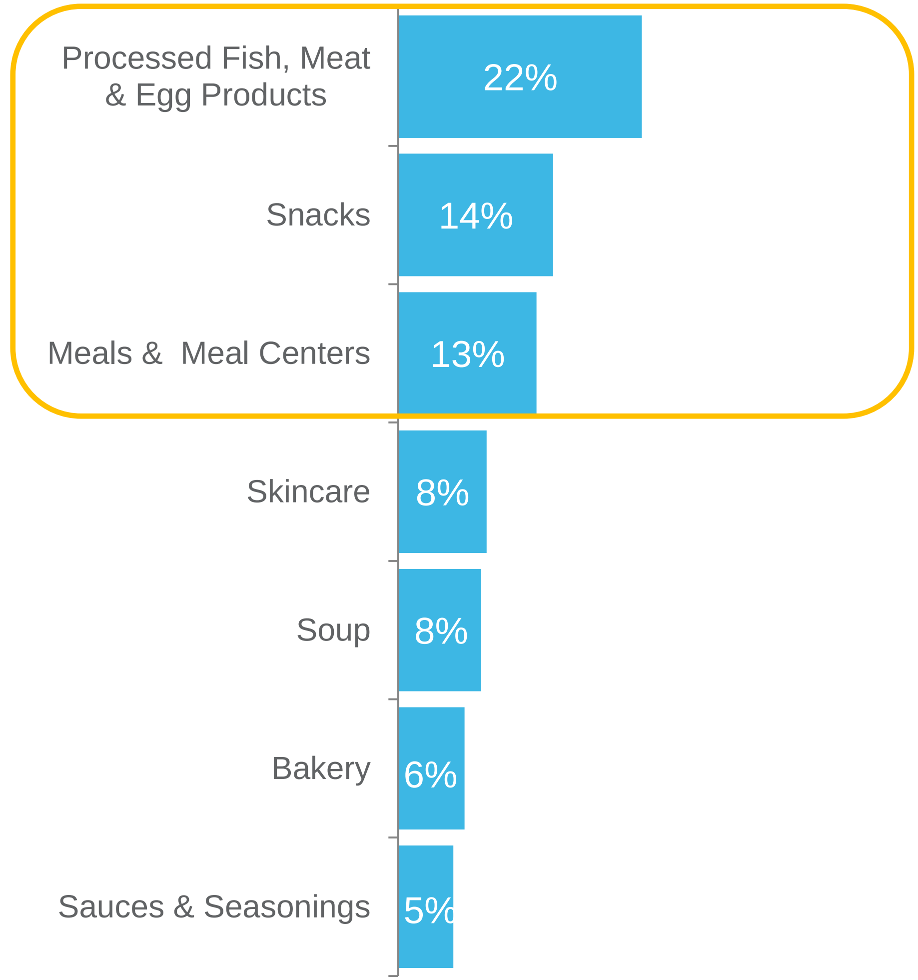
Country, Region & Categories

- The USA and the UK were the top 2 countries for launches of green pea products in the last 3 months.
- Processed food products, snacks and meals/meal centres were the top categories for launches.

Top Launch Countries



Top Launch Categories



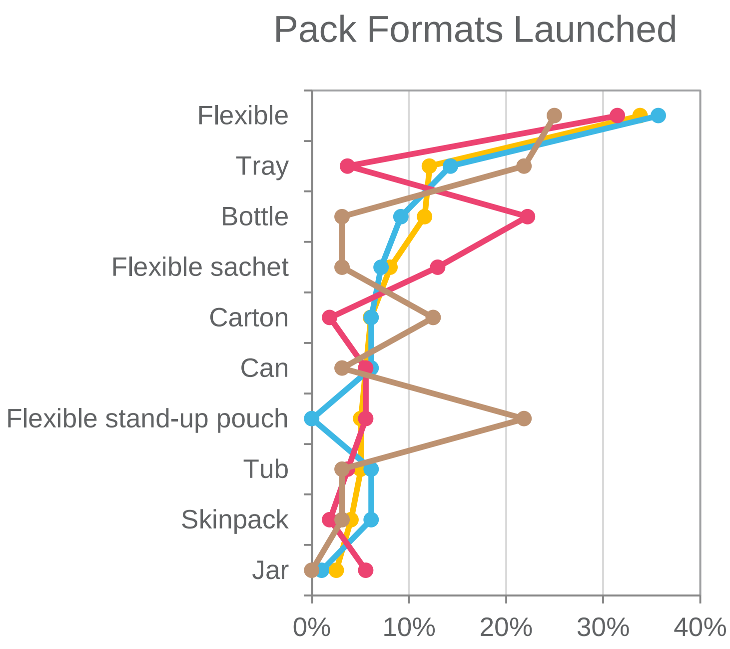
colmar brunton.

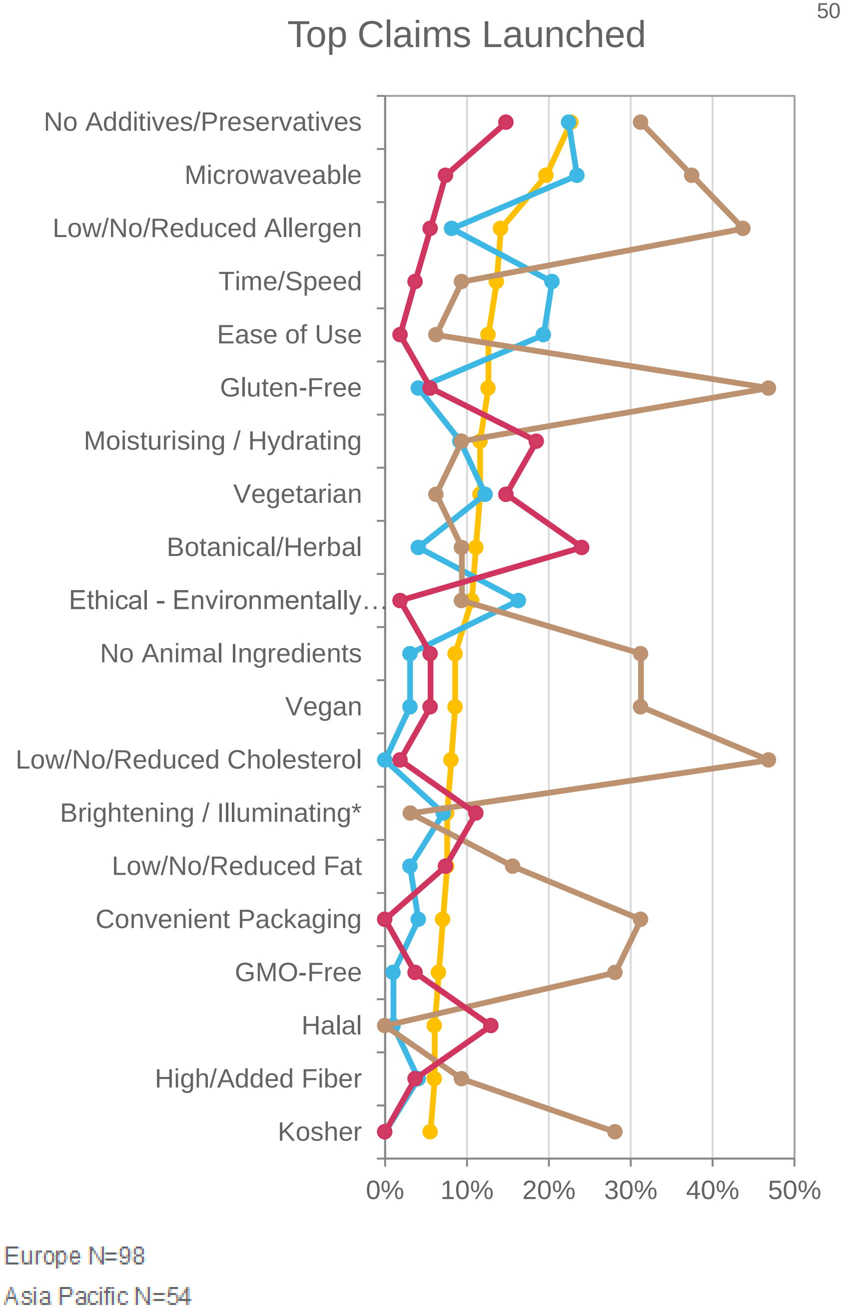
Number of Global Green Peas NPDs for the L3M N=198

Green Peas SKUs

Top Claims & Pack Formats Used

- No additives and preservatives, being microwaveable and having low/no/reduced allergens were the top claims used for products launched containing green peas.
- Flexible pack formats, followed by trays and bottles were the most used pack formats for launches in the last 3 months.





Number of Global Green Peas NPDs for the L3M N=198
Only shown at global level as no regions had more than 30 products launched.

Innovative Green Peas Launches:
L3M (April-June 2013)

Calbee Bun Bun Original Green Pea Snack (Thailand)

Calbee Bun Bun Original Green Pea Snack has been repackaged in a newly designed pack, featuring the Digimon Xross Wars cartoon characters. The certified halal product retails in a 34g pack. The snack is also available in a multipack containing 2 x 14g units and one free Toei Animation Digimon Xros Wars Shooter toy.

Claims:
Halal, Male, Children (5-12)

Ñaming Russian Salad (Spain)

Ñaming Ensaladilla Rusa (Russian Salad) is now available. The product is said to be fresh and flavourful, and has been created by chef Martin Berasategui. It contains bonito and retails in a 300g pack.

Claims:
N/A

Goldenpearl Whitening Soap (South Africa)

Goldenpearl Whitening Soap is described as a moisturising soap for dry skin and contains special herbs and pea extract, a natural ingredient which is said to help in whitening of skin while enabling to produce skin cells. The product is claimed to not dry the skin, helping to maintain its texture throughout the day.

Claims:
Botanical/Herbal, Moisturising / Hydrating, Whitening

Wattie's Soup of The Day Minted Garden Pea Soup (New Zealand)

Wattie's Soup of The Day Minted Garden Pea Soup is said to be made with quality ingredients that are chopped, gently simmered and carefully combined. The flavours are then locked in using a foil fresh pack with no preservatives or added colours.

Claims:
No Additives/Preservatives, On-the-Go, Microwaveable

Source: Mintel (2013)

Innovative Green Peas Launches:
L3M (April-June 2013)

Economical Garlic Flavoured Green Pea (Taiwan)

Economical Garlic Flavoured Green Pea is now available. The product retails in a 240g pack.

Claims:
Economy

Beyond Meat Lightly Seasoned Chicken-Free Strips (USA)

Marks & Spencer Eat Well Delicious & Nutritious Fenugreek Spiced Chicken and Roasted Cauliflower comprises marinated chicken in fenugreek spiced yellow split pea dahl with roasted cauliflower, cherry tomatoes and green beans with coriander.

Claims:
Hormone Free, Low/No/Reduced Allergen, Low/No/Reduced Cholesterol, GMO-Free, High/Added Fiber, Vegan, Microwaveable, Gluten-Free, No Animal Ingredients

Supatra Butterfly Pea Conditioner (Thailand)

Supatra Butterfly Pea Conditioner is part of a range of products which, according to the manufacturer, are made using only the finest natural ingredients in environmentally-friendly formulas, made for the preservation of craftsmanship and traditional knowledge. The product is enriched with butterfly pea extract and vitamin E.

Claims:
Botanical/Herbal, Vitamin/Mineral Fortified, Anti-Hairloss, Ethical - Environmentally Friendly Product

New York Bakery Mooncake (South Korea)

New York Bakery Mooncake is filled with pea paste made with 25.5% pea. The product retails in an 80g pack.

N/A

Source: Mintel (2013)

Innovative Green Peas Launches:
L3M (April-June 2013)

Suave Naturals Sweet Pea & Violet Moisturizing Body Wash (USA)

Suave Naturals Sweet Pea & Violet Moisturizing Body Wash is now available in a newly designed 12-fl. oz. recyclable pack featuring a message advising the user to turn off the tap and shorten shower times. Enriched with sweet pea, violets extracts and skin conditioning vitamin E.

Claims:
Vitamin/Mineral Fortified, Botanical/Herbal, Hypoallergenic, Ethical - Environmentally Friendly Package, Moisturising / Hydrating, Female

Spicy QQ / XiangQQ Spicy Peas (China)

Spicy QQ / XiangQQ Xiang La Qing Dou (Spicy Peas) are said to be aromatic and delicious. According to the manufacturer, pea is rich in protein, fat, and carbohydrate. This product retails in an 80g pack.

Claims:
N/A

Tesco 3 of Your 5 a Day Apple, Banana, Cucumber & Pea Juice (UK)

Tesco 3 of Your 5 a Day Apple, Banana, Cucumber & Pea Juice provides three of the consumer's five-a-day of fruits and vegetables. The pasteurised blend of apple, banana, cucumber, pea and lemon juices and purées is suitable for vegetarians and retails in a 1L recyclable bottle.

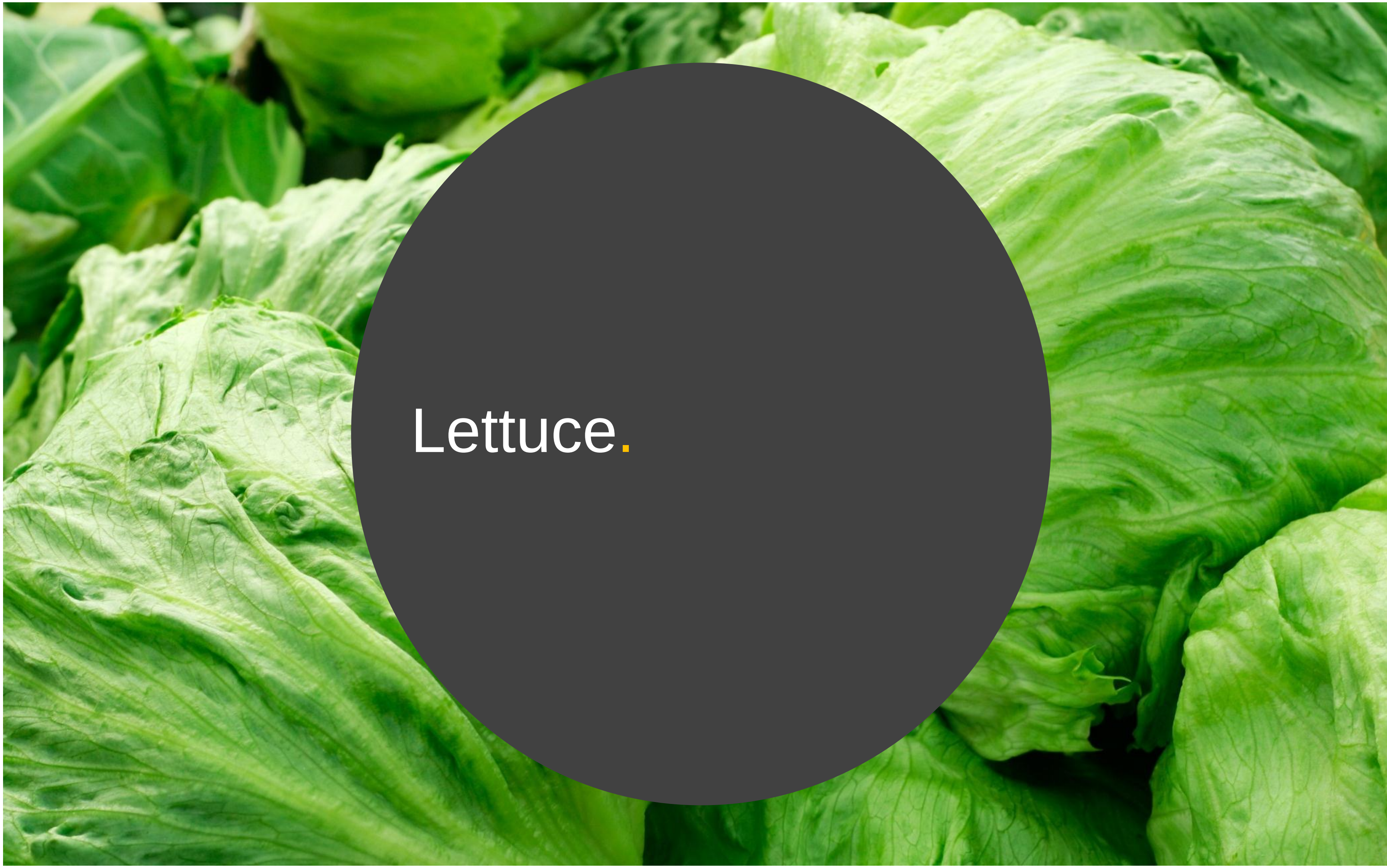
Claims:
Vegetarian, Ethical - Environmentally Friendly Package

Frosta Chinese Style Vegetable Mix (Poland)

Frosta Chinska Mieszanka Warzyw (Chinese Style Vegetable Mix) is a selection of vegetables with sauce, which can be prepared in eight minutes. This microwaveable product is free from flavour enhancers, colours, flavourants, modified starch and hardened fats, retailing in a 400g pack.

Claims:
No Additives/Preservatives, Low/No/Reduced Transfat, Microwaveable

Source: Mintel (2013)



Lettuce.

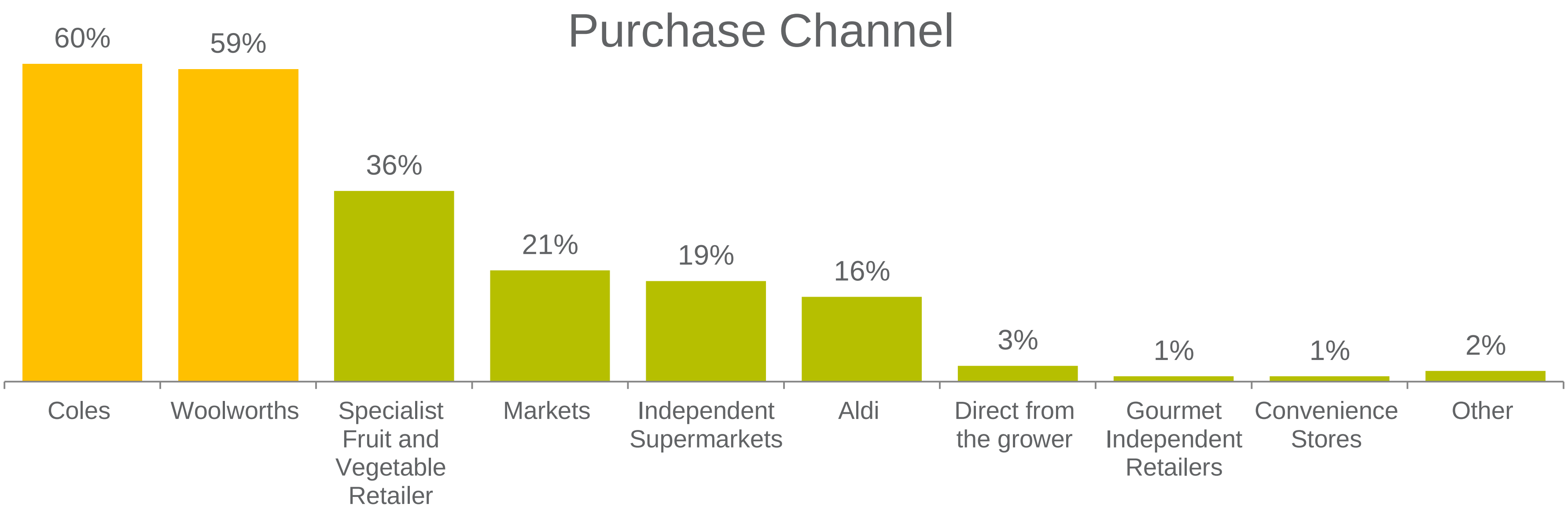
Purchase and Consumption Behaviour

Lettuce

Average Purchase **4.5** times per month

Average Consumption **13.6** times per month

- Consistent with other commodities tracked lettuce is mainly purchased through mainstream retail channels (Woolworths and Coles).
- Specialist vegetable retailers were also a common purchase location for lettuce.
- On average lettuce is consumed 13.6 times a month and purchased 4.5 times a month.



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 N=508

Average Spend & Price Sensitivity
Lettuce

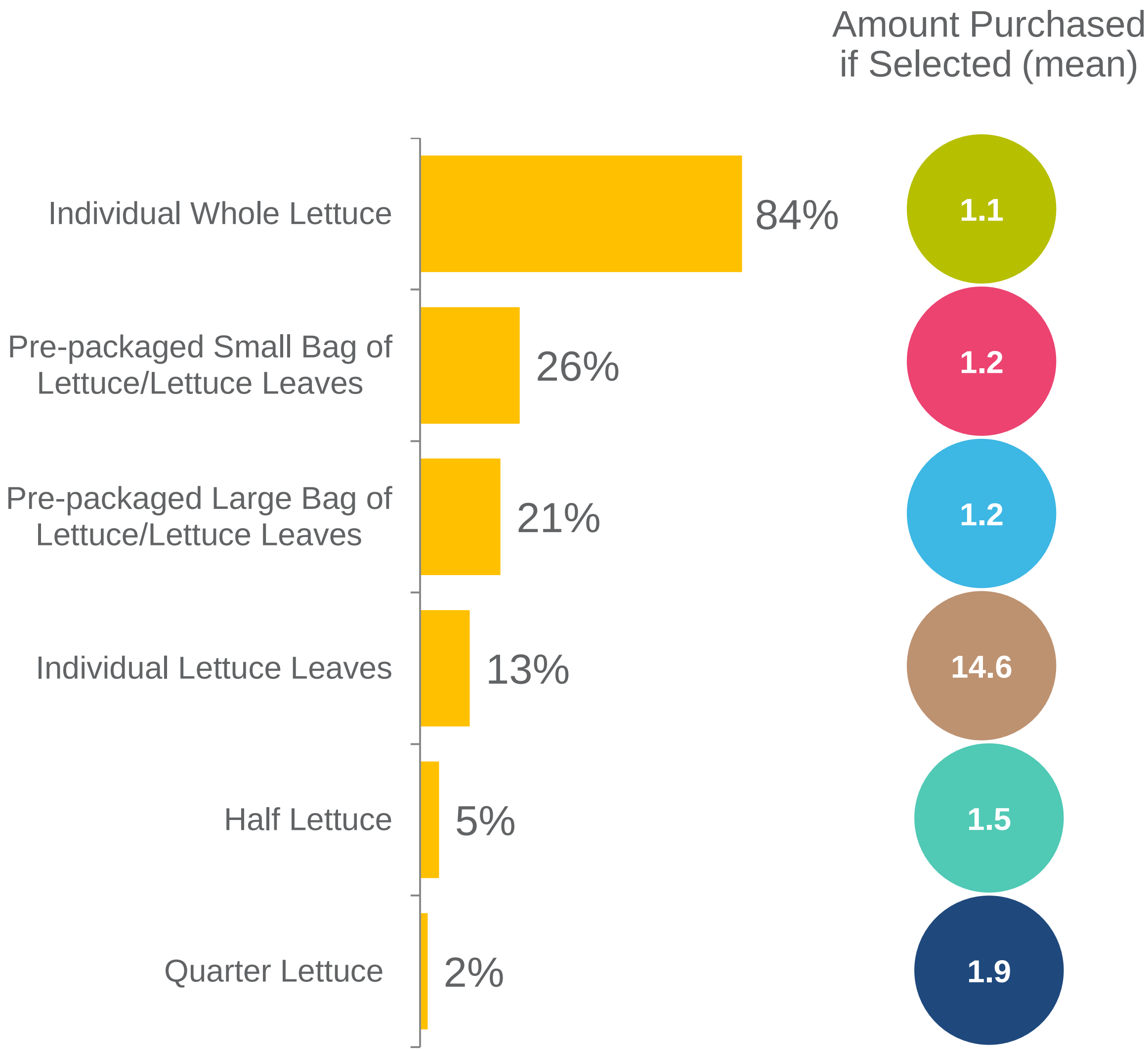
⇛ The average consumer typically purchased **800g** of Lettuce.

⇛ The average recalled last spend on Lettuce was **$3.07.**

⇛ Consumers perceived the average price for Lettuce as good value for money **(6.1/10).**

Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? 0-10 scale
Sample N=508

Pack Formats Purchased
Lettuce

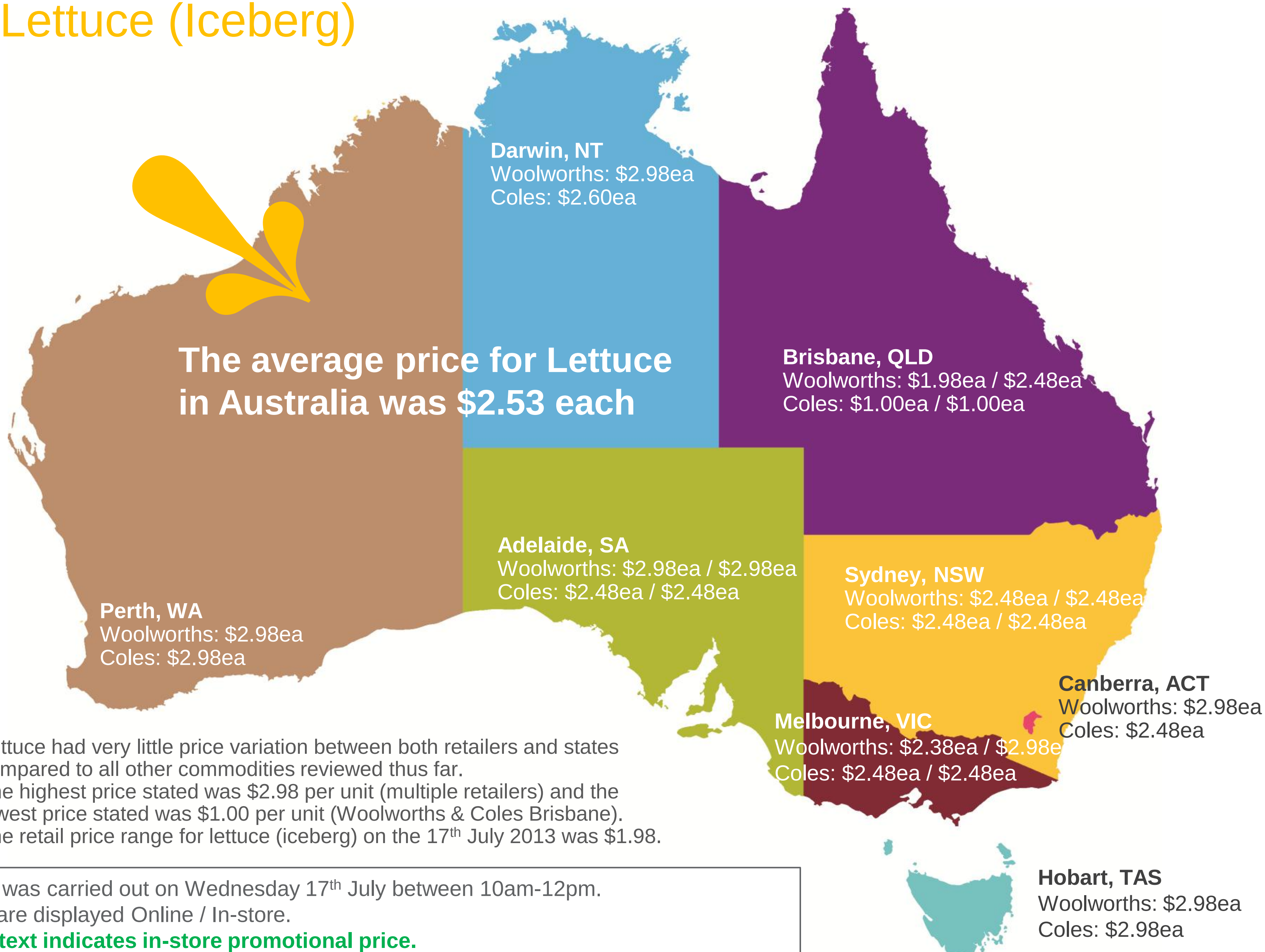


- Pre-packaged purchase was significantly lower than buying whole fresh lettuce
- On average respondents purchased between 1-2 units of the pack formats shown.

Q3a. How much <commodity> does this typically equate to?
Sample N=508

Online and In-store Commodity Prices

Lettuce (Iceberg)

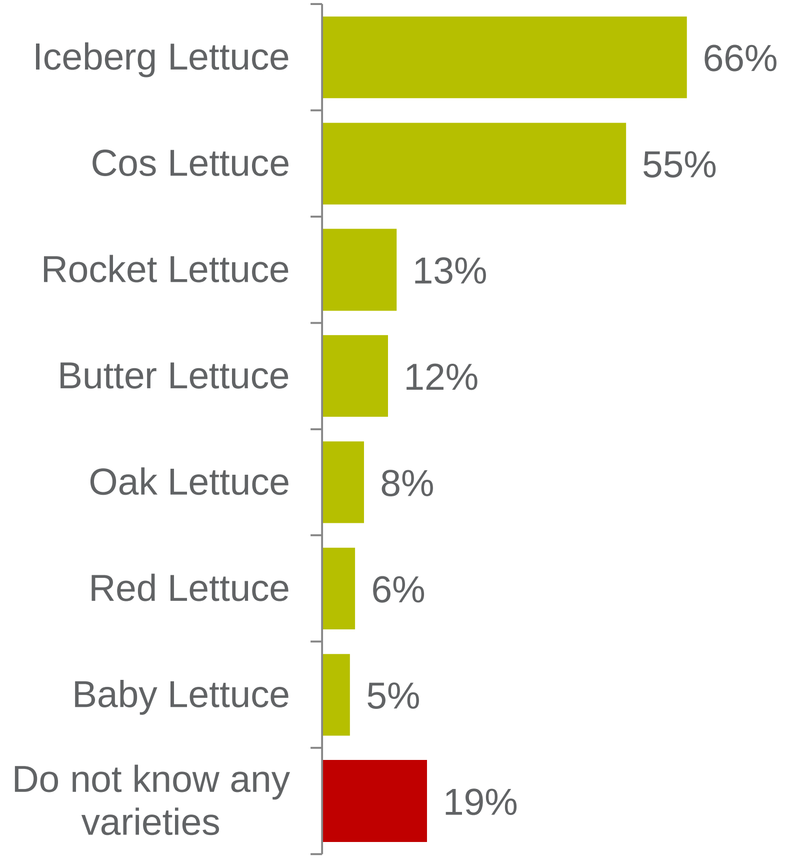


- Lettuce had very little price variation between both retailers and states compared to all other commodities reviewed thus far.
- The highest price stated was $2.98 per unit (multiple retailers) and the lowest price stated was $1.00 per unit (Woolworths & Coles Brisbane).
- The retail price range for lettuce (iceberg) on the 17th July 2013 was $1.98.

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

Spontaneous Varietal Awareness & Purchase

Lettuce

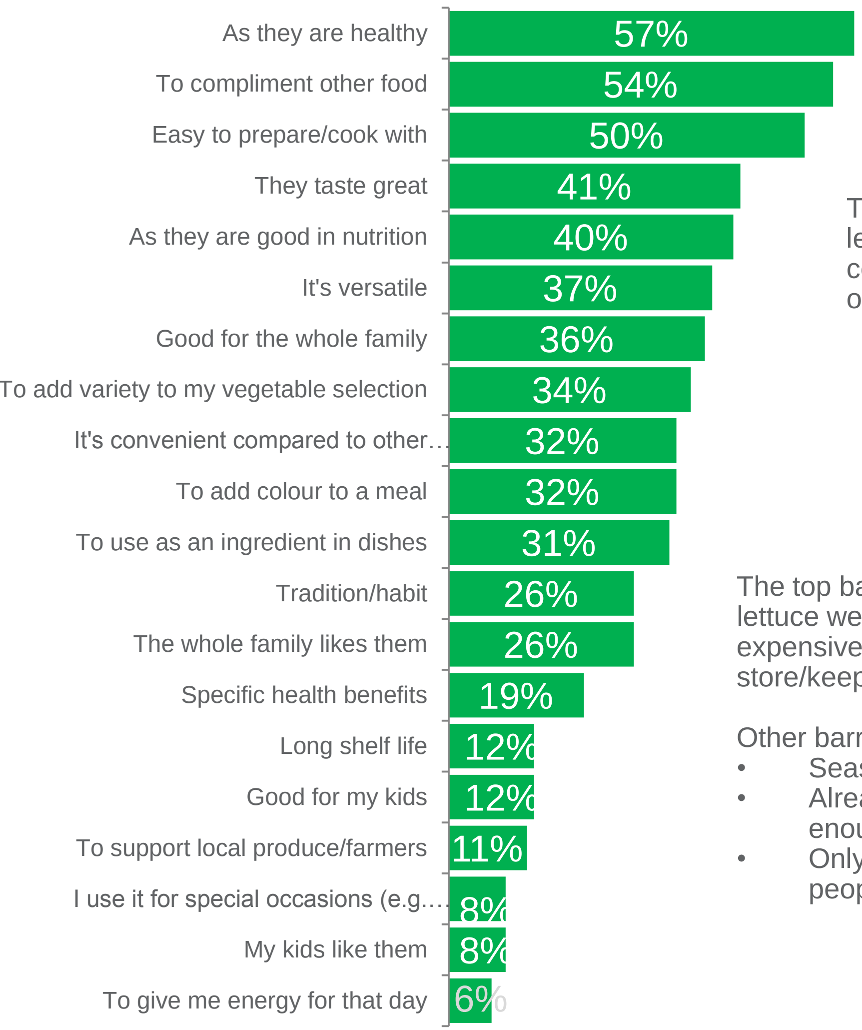


- Awareness of lettuce varieties was particularly high compared to other commodities being tracked.
- Only 19% of respondents stated that they do not know any varieties of lettuce.
- The varieties of lettuce respondents were most aware of are Iceberg and Cos lettuce.

N=508
Q6a. What varieties of <commodity> are you aware of? (unprompted)

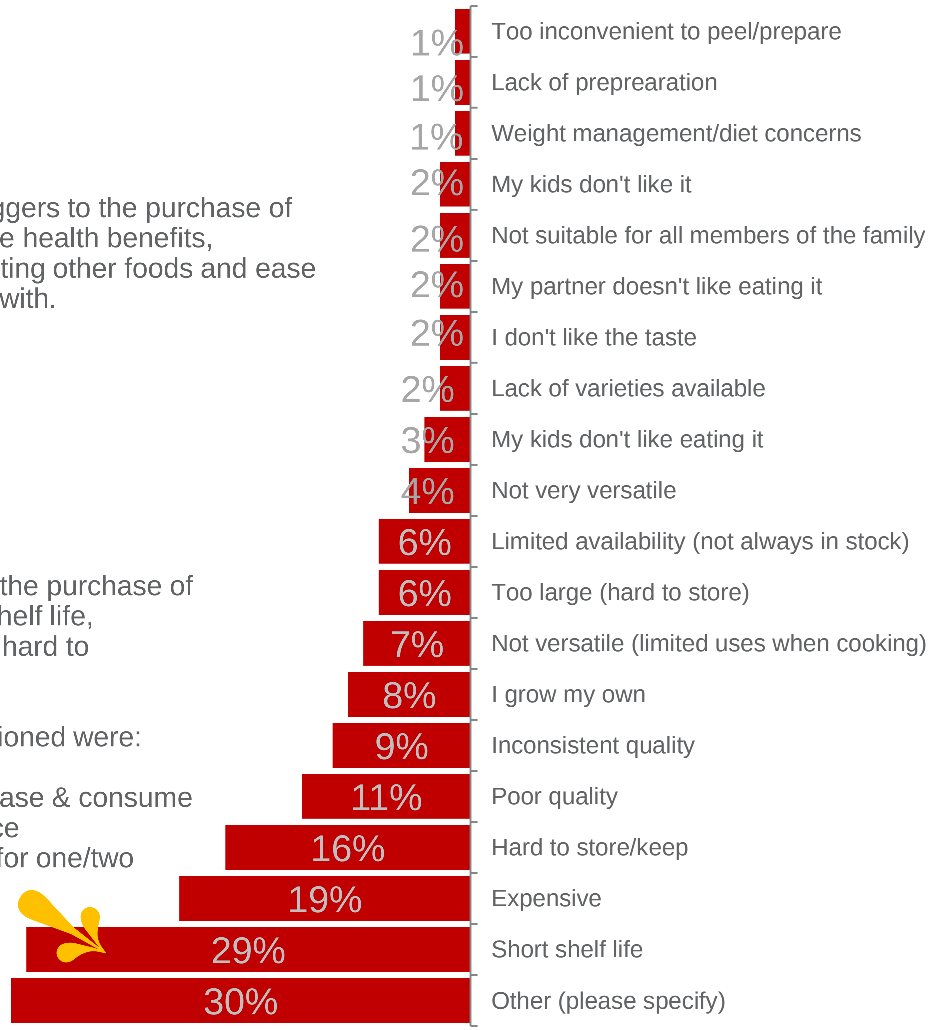
Triggers & Barriers to Purchase
Lettuce

Triggers



The top triggers to the purchase of lettuce were health benefits, complimenting other foods and ease of cooking with.

Barriers



The top barriers for the purchase of lettuce were short shelf life, expensiveness and hard to store/keep.

Other barriers mentioned were:

- Seasonal use
- Already purchase & consume enough Lettuce
- Only cooking for one/two people

N=512

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

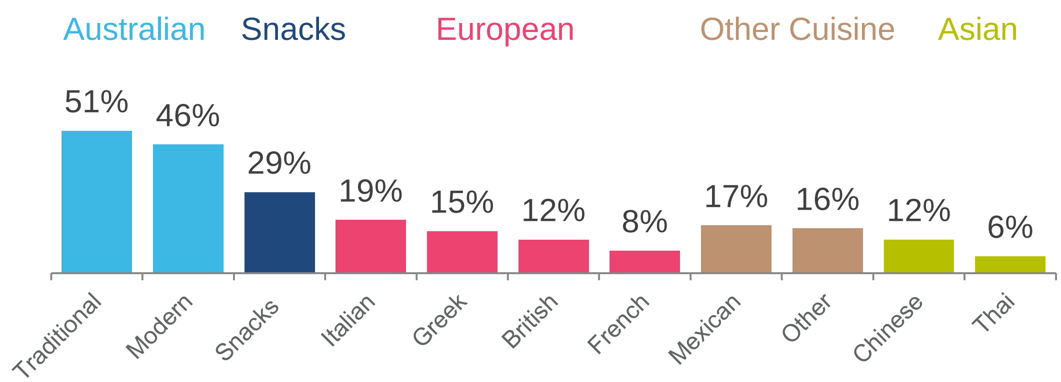
Q8. Which reason best describes why you don't buy <commodity> more often?

colmar brunton.

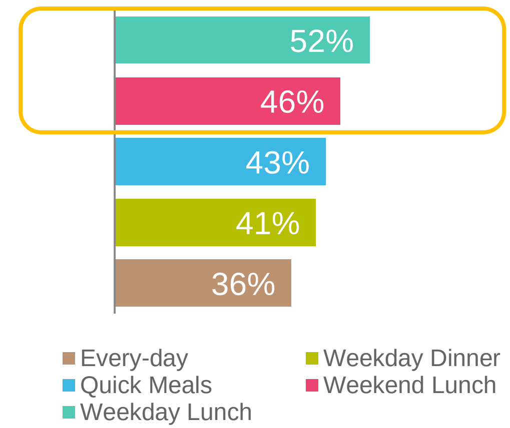
Cooking Preferences & Occasions: Lettuce

- The top cuisines respondents stated they cooked with lettuce were Australian cuisine and snacks.
- Consumption occasions were more evenly spread over dinners and lunches than other commodities tracked.
- The top vegetables to accompany lettuce were tomatoes, carrots and capsicums.
- Lettuce was rarely cooked, with respondent opting to consume raw.

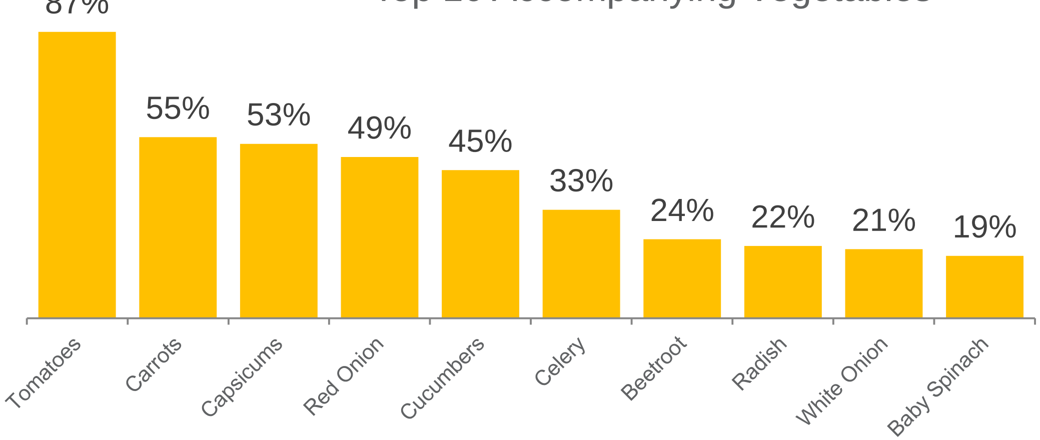
Typical Cuisine Cooked



Top 5 Consumption Occasions



Top 10 Accompanying Vegetables

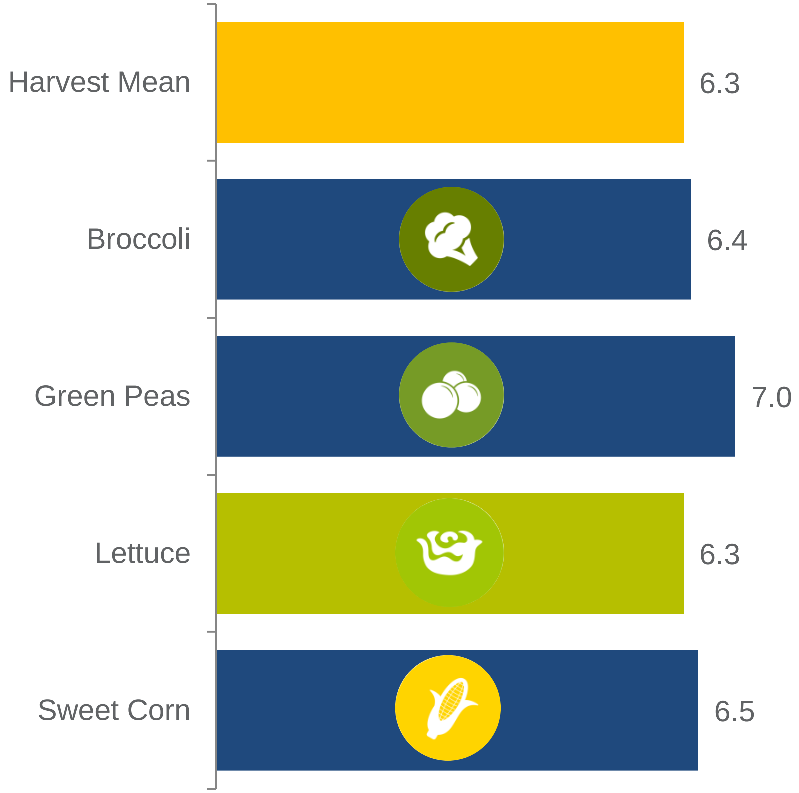


Top 10 Cooking Styles	
Raw	74%
Other	21%
Stir frying	5%
Soup	3%
Steaming	2%
Boiling	2%
Blanche	2%
Microwave	1%
Sautéing	1%
Shallow Frying	1%

N=512
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

⇛ Importance of provenance is relatively important to respondents for lettuce. It is on par with the current average score for all commodities tracked thus far.



Q14. When purchasing <commodity>, how important is Provenance to you?
Broccoli N=525
Green Peas N=503
Lettuce N=512
Sweet Corn N=509

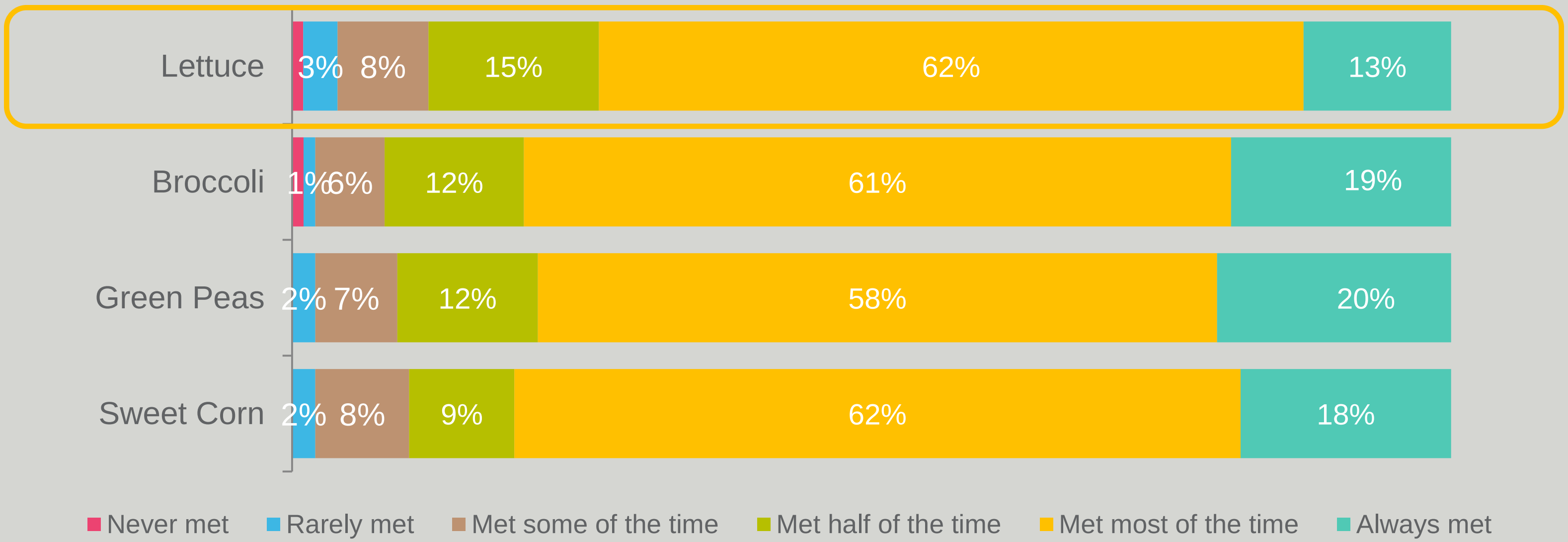
colmar brunton.

Freshness and Longevity: Lettuce

Expected to stay fresh for **7.6** days

- Respondents indicated that they expected lettuce to stay fresh for over a week once purchased.
- 13% of respondents stated freshness was always met whilst 62% stated it was met most of the time.
- 27% of respondents stated that lettuce freshness is met at best only half of the time, which the highest of the commodities.

Expectations Met



N=512
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> ?

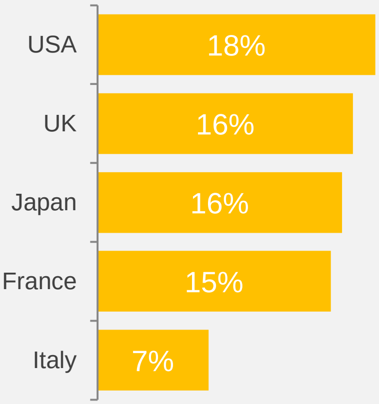
Trends: Lettuce

Lettuce Global NPDs

April–June 2013

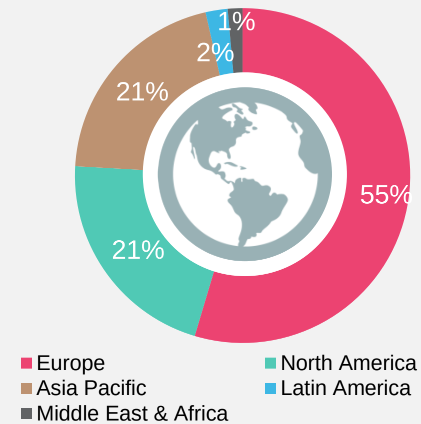
There were 141 new products launched in the last 3 months globally containing lettuce as an ingredient. The majority of these launches occurred in Europe. The top categories for launches were meals and fruit and vegetables.

Country

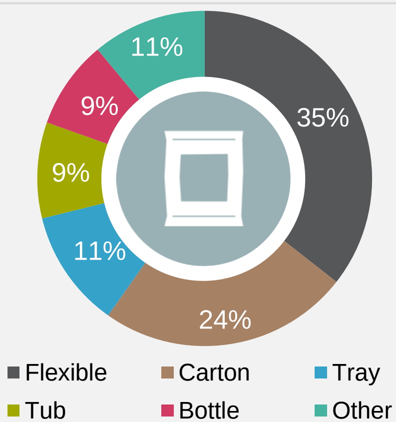


141 Global NPDs

Region



Top Pack Formats



Categories

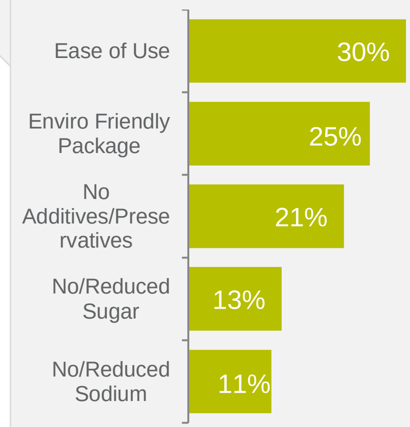
Meals 40%

Fruit & Vegetables 30%

Juice Drinks 16%

Healthcare 2%

Top Claims



Lettuce Product Launches:
Last 3 Months (April-June 2013)
Summary

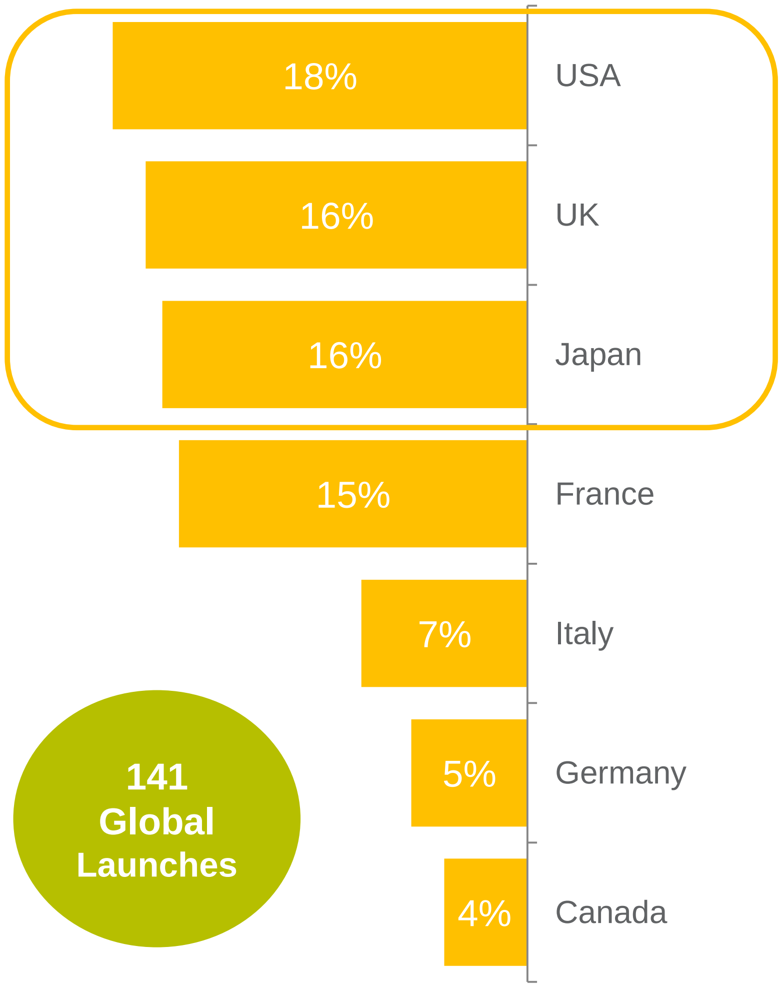
- There were 141 launches of products containing lettuce as an ingredient globally in the last 3 months. Two of these launches were in Australia (a Caesar salad pack and a tasty chicken and avocado sandwich pack).
- The majority of products launched in the last 3 months were in Europe (55%).
- Flexible & carton packaging were the top packs formats used launches in the last 3 months, 35% and 24% respectively.
- The top categories for launches were meals (40%), fruit and vegetables (30%) and juice drinks (16%).
- The core claims used for launches globally were ease of use (30%), ethical packaging (e.g. environmentally friendly 24%) & no additives/preservatives (21%).
- The most innovative launches found were mini pork salad wrap packs and bubble bath formula (examples of these can be found over the next slides).

Source: Mintel (2013)

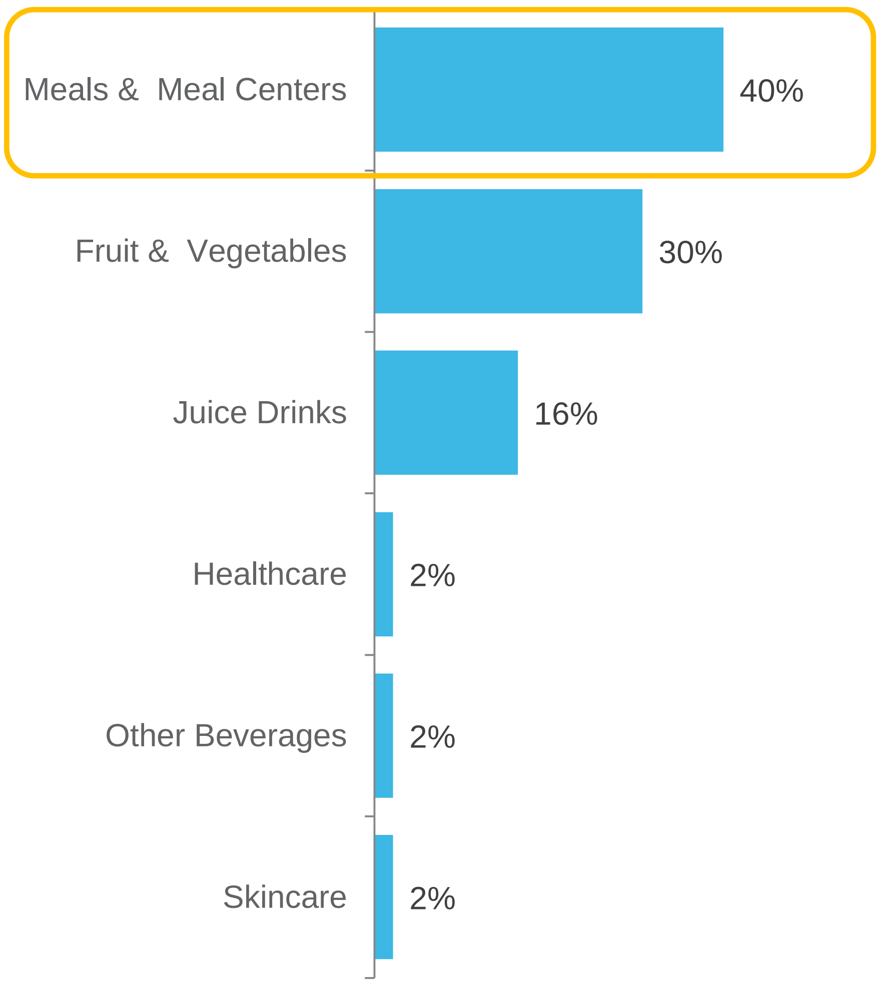
Lettuce SKUs
Country, Region & Categories

- The top launch locations for lettuce products in the last 3 months were the USA, UK and Japan.
- Meals and meal centres had the highest amount of launches in the last 3 months.

Top Launch Countries



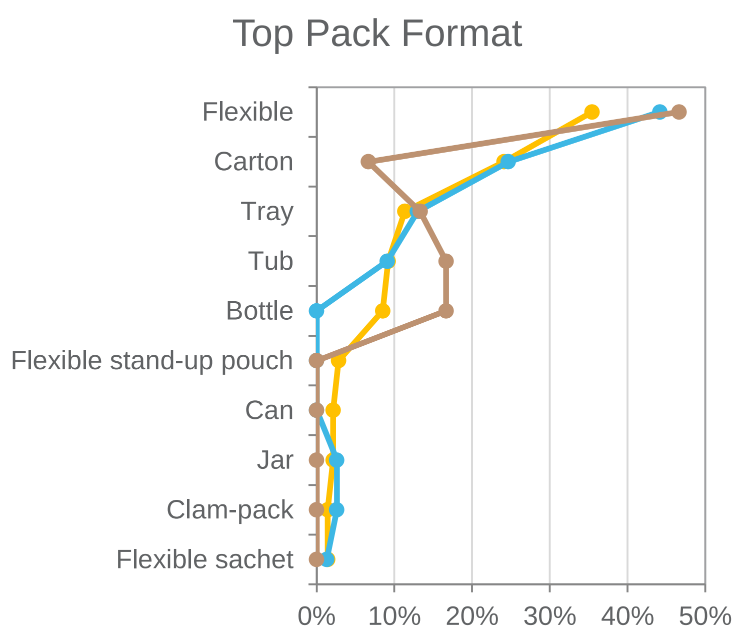
Top Launch Categories

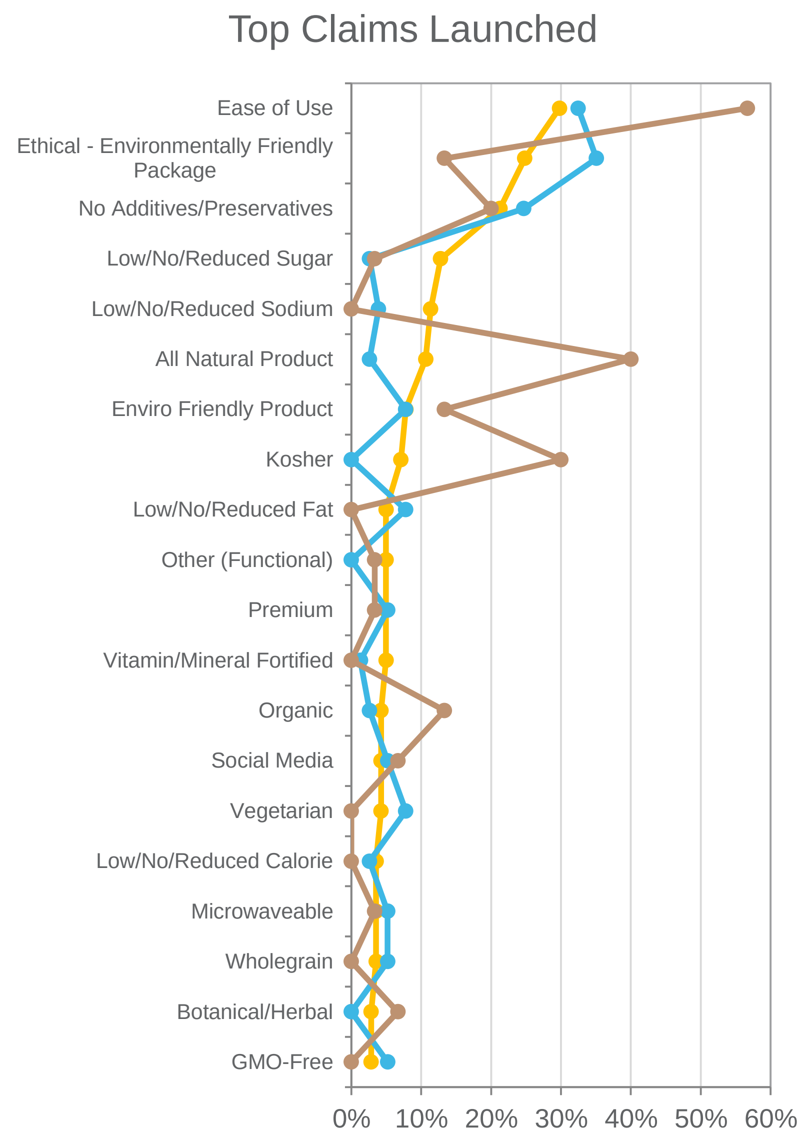


Number of Global Lettuce NPDs for the L3M N=141

Lettuce SKUs
Top Claims & Pack Formats Used

- Ease of use, ethical/environmentally friendly packaging and no additives/preservatives were the top claims used for launches globally in the last 3 months.
- Flexible packaging was the most common pack format used for products launched, followed by cartons and trays.





Global N=141
Europe N=77
North America N=30

Number of Global Lettuce NPDs for the L3M N=141
Only regions with n >30 are displayed

Innovative Lettuce Launches:
L3M (April-June 2013)

Garden Life Soup n' Salad Kit (Canada)

Garden Life Soup n' Salad Kit consists of a chicken with wild rice soup and Caesar salad including croutons, dressing and a spork. It is prepared by simply opening and assembling the salad and prepare the soup. The microwavable product is ready in minutes and retails in a 255g pack.

Claims:
Ease of Use, Time/Speed, Microwaveable

Herdez 8 Vegetables Juice (Mexico)

Herdez Jugo de Verduras 8 (8 Vegetables Juice) has been repackaged and is now available in a newly designed 355ml pack featuring the ESR (Empresa Socialmente Responsabile) logo. This low-sodium juice is available in a picante-limón (spicy-lemon) flavour and is enriched with vitamin A and C.

Claims:
Low/No/Reduced Sodium, Vitamin/Mineral Fortified, Ethical - Environmentally Friendly Product

Green Factory Lamb Lettuce (Ukraine)

Green Factory Salat Ropshonka (Lamb Lettuce) does not contain any GMO. This product retails in a 100g pack.

Claims:
GMO-Free

Devas Grapefruit & Bergamot Bubble Bath (Canada)

Devas Grapefruit & Bergamot Bubble Bath contains organic vegetable extracts, including lettuce, red clover, sage, calendula and horsetail. The 100% biodegradable and 99% natural product is said to calm and purify.

Claims:
Paraben Free, Botanical/Herbal, Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Ethical - Animal, Organic

Source: Mintel (2013)

Innovative Lettuce Launches:
L3M (April-June 2013)

Huertas Del Pilar Chef's Salad (Argentina)

Huertas Del Pilar Ensalada del Chef (Chef's Salad) is described as naturally healthy and tasty. The salad contains mixed vegetables, grated carrots, cherry tomato, boiled egg, ham, and semi-soft cheese, and each portion contains 158kcal. This product retails in a 250g pack.

Claims:
N/A

Zolotaya Rus' Vegetable Mix Juice (Russia)

Zolotaya Rus' Sok Ovoshchnaya Smes' (Vegetable Mix Juice) is a first class product made from concentrated tomato paste, vegetable juices and purees. The GMO-free product is suitable for children from three years old onwards. This product retails in a 1L carton made from wood from renewable natural resources.

Claims:
Ethical - Environmentally Friendly Package, GMO-Free

7-Select Healthcare Prune Flavoured Drink (Taiwan)

7-Select Healthcare Prune Flavoured Beauty Drink has been relaunched and is now available in a 50ml pack. The beauty drink contains kiwifruit extract, American prune and Japanese patent formula to help promote metabolism.

Claims:
Beauty Benefits, Botanical/Herbal, Other (Functional), Low/No/Reduced Fat, No Animal Ingredients, Vegan

Marks & Spencer Great British Summer Garden Salad Sandwich (UK)

Marks & Spencer Great British Summer Summer Garden Salad Sandwich comprises full fat soft cheese and chives, cucumber, tomatoes, pickled carrots and radish with lettuce and salad cream on soft brown poppy seed bread.

Claims:
Seasonal, Vegetarian, Ethical - Environmentally Friendly Package

Innovative Lettuce Launches:
L3M (April-June 2013)

Bolthouse Farms Daily Greens 100% Fruit & Vegetable Juice (USA)

Bolthouse Farms Daily Greens 100% Fruit & Vegetable Juice + Boosts provides a 1/2 cup of kale, spinach and romaine per bottle and 4 1/2 servings of veggies per bottle. The kosher certified product is free from preservatives and artificial colors or flavors .

Claims:
No Additives/Preservatives, Immune System (Functional), Kosher, Other (Functional), Ethical - Environmentally Friendly Package, Antioxidant

Marks & Spencer Eat Well Delicious & Nutritious Vietnamese Style Marinated Pork Salad Bites (UK)

Qiao De Wang Qiao Mai Dou Pi (Buckwheat and Dried Green Bean Sheet) is made with pure natural quality ingredients and processed according to traditional technique and formula. This product can be boiled or stir fried, and retails in a 1.5kg pack.

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

Mix Buffet Multitudes Chicken and Emmental Cheese Salad with Lettuce & Pasta (France)

Mix Buffet Multitude d'Ingrédients Savoureux! Salade & Serpentini Poulet Emmental (Chicken and Emmental Cheese Salad with Lettuce & Pasta) contains tomatoes, crudités and a pot of parmesan sauce.

Claims:
N/A

O Organics Southwest Style Salad (USA)

O Organics Southwest Style Salad comprises organic Romaine lettuce, organic Southwest ranch dressing, organic chicken meat, organic corn, organic Monterey jack cheese, organic tortilla strips and organic carrots. It is organic certified by USDA and is said to provide 260 calories per bowl.

Claims:
No Additives/Preservatives, Organic

Source: Mintel (2013)

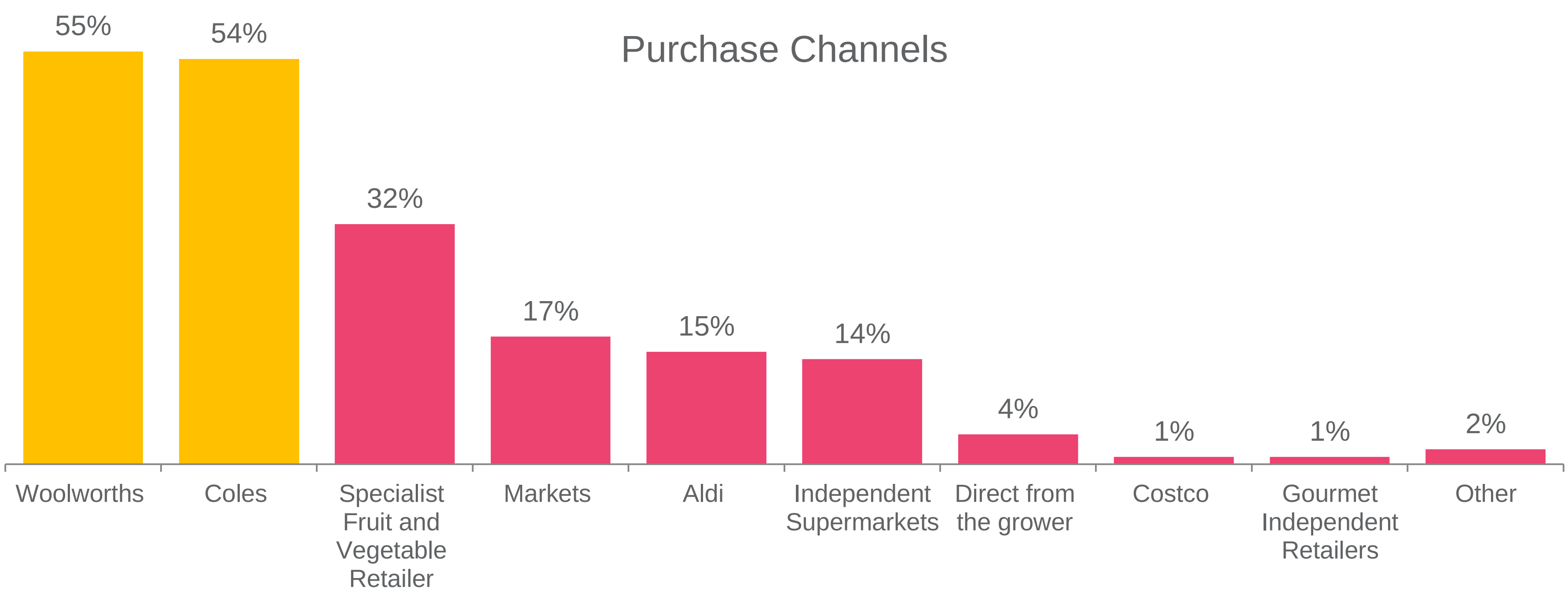

Sweet Corn.

Purchase and Consumption Behaviour
Sweet Corn

Average Purchase **3.3** times per month

Average Consumption **5.9** times per month

- Consumption of sweet corn per month is significantly less than other commodity tracked thus far. Purchase frequency of sweet corn is slightly lower as well.
- Sweet corn was most commonly purchased through mainstream retail channels (Woolworths and Coles).
- A third of respondents purchased sweet corn from specialist vegetable retailers.



Q1. On average, how often do you purchase <commodity>?
Q2. On average, how often do you consume <commodity>?
Q5. From which of the following channels do you typically purchase <commodity>?
Sample N=506

Average Spend & Price Sensitivity

Sweet Corn

⇛ The average consumer typically purchases **800g** of Sweet Corn.

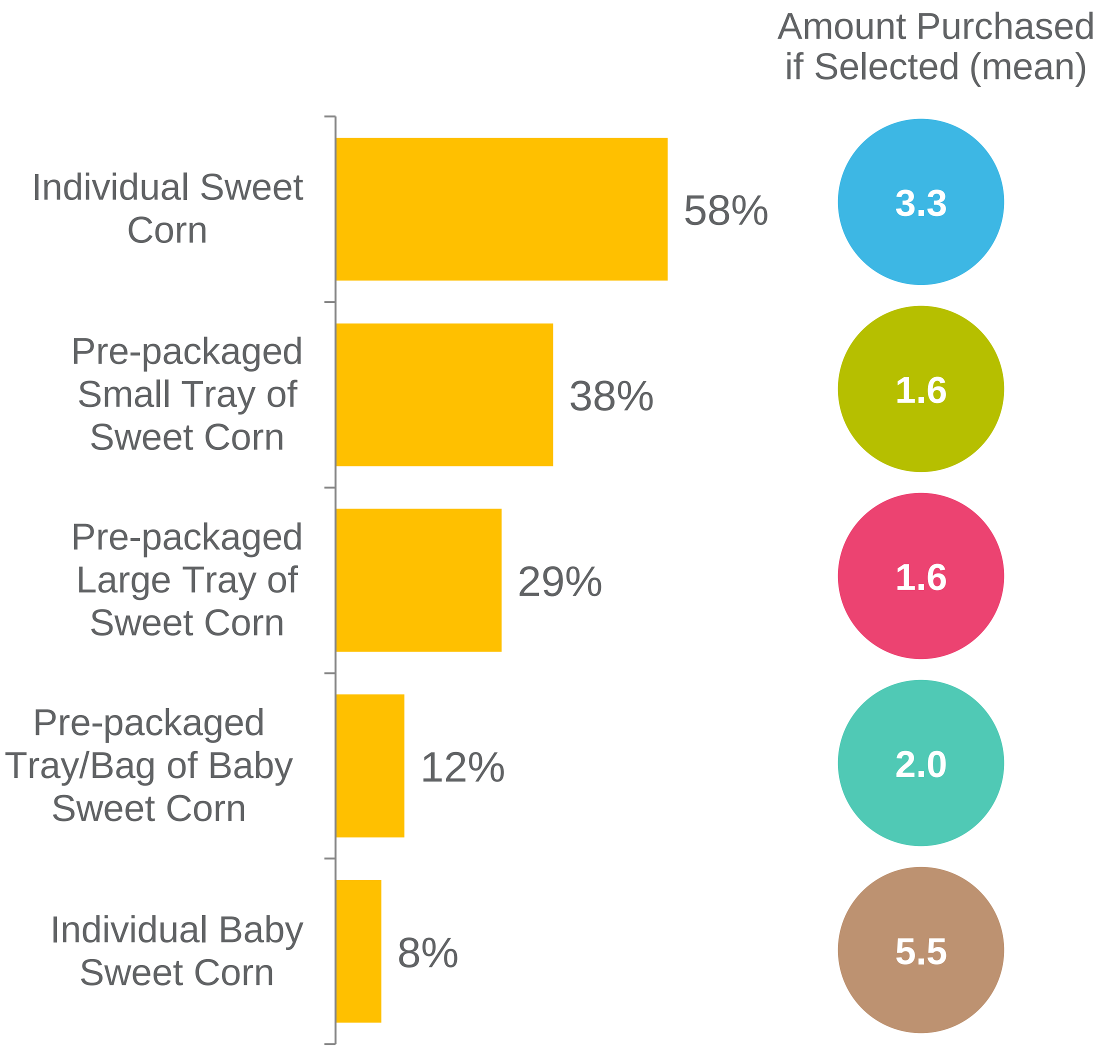
⇛ The average recalled last spend on Sweet Corn was **$3.55.**

⇛ Consumers perceived the average price for Sweet Corn as good value for money **(6.5/10).**

Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is?

Pack Formats Purchased

Sweet Corn

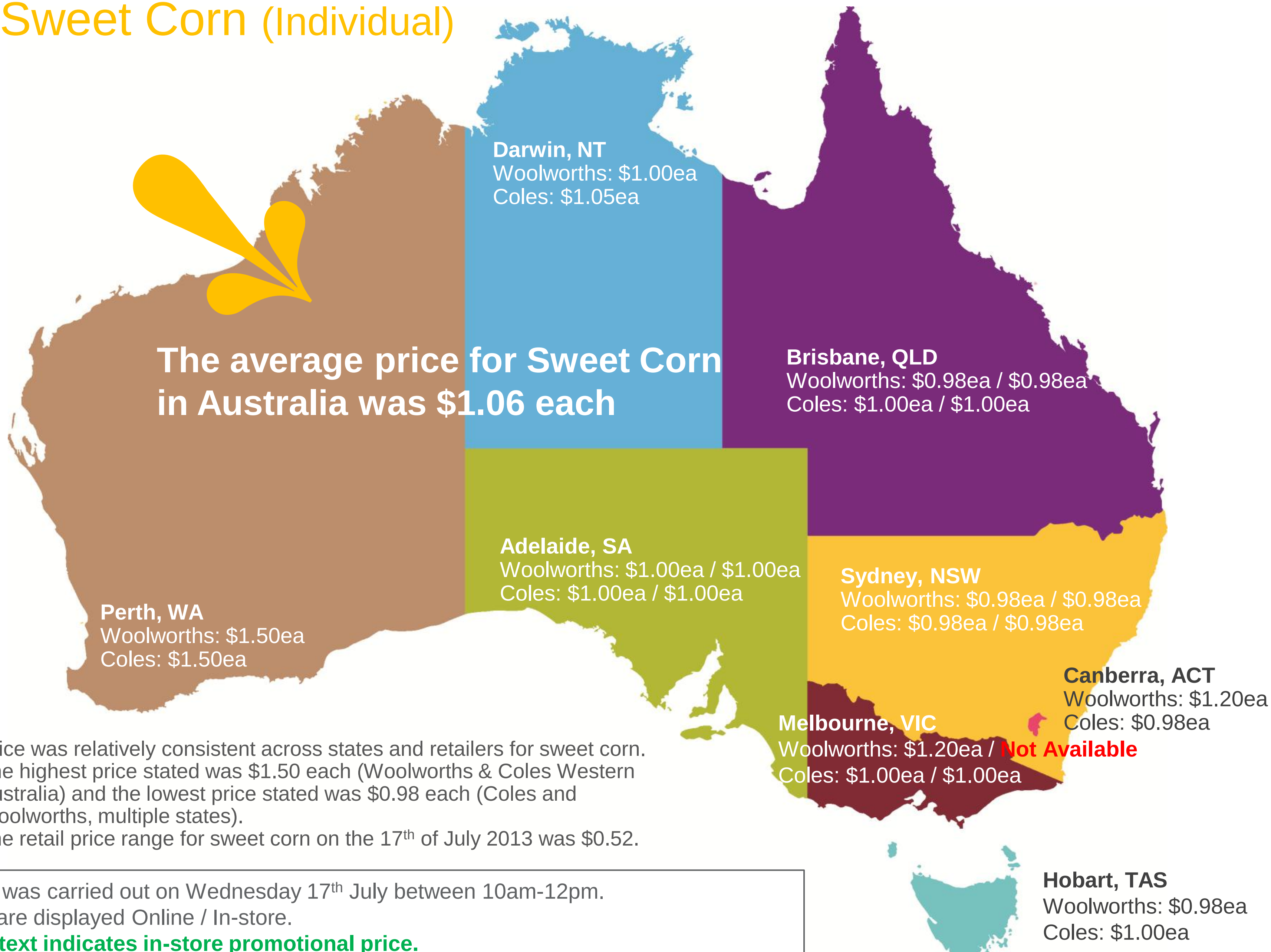


- Purchasing sweet corn individually (unpackaged) was the most common format respondents stated they purchase.
- Pre-packed trays were the default pack formats purchased if sweet corn was not purchased individually.
- On average between 1-2 units of packaged sweet corn is purchased. If purchased unpackaged on average 3.3 sweet corn cobs are purchased.

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

Online and In-store Commodity Prices

Sweet Corn (Individual)

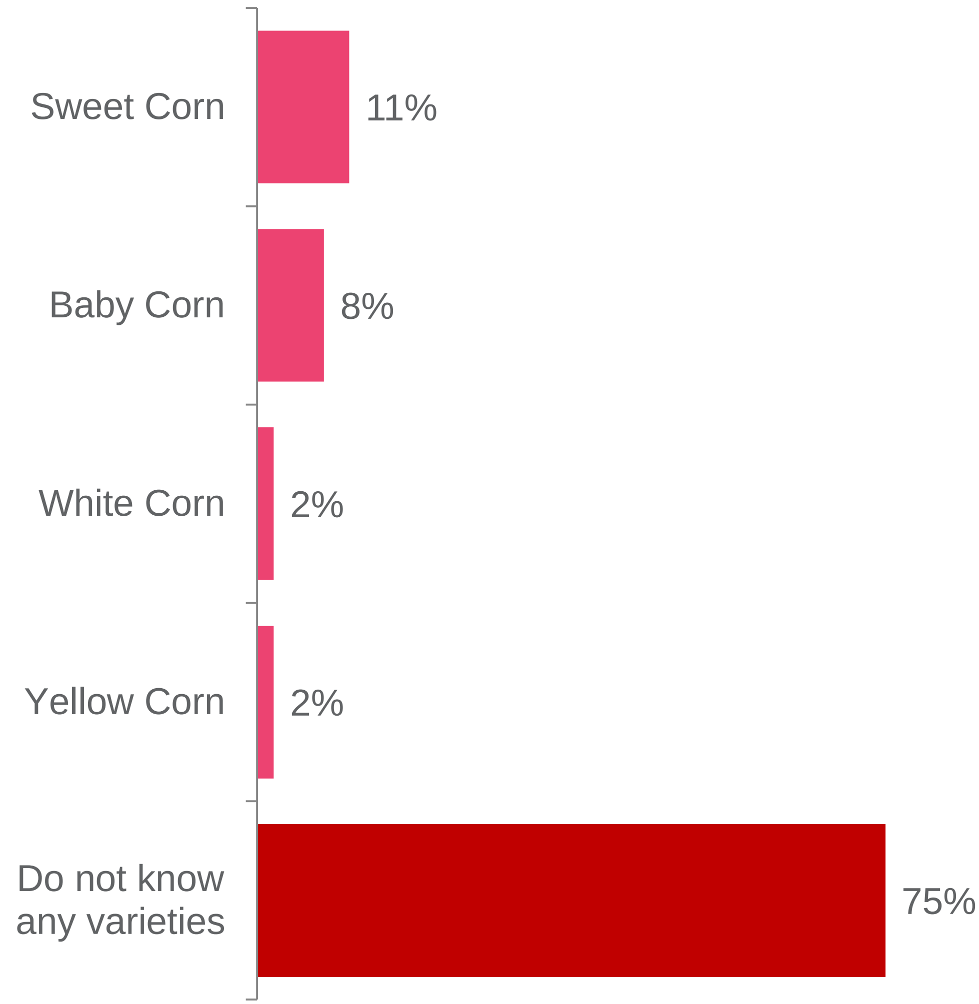


- Price was relatively consistent across states and retailers for sweet corn.
- The highest price stated was $1.50 each (Woolworths & Coles Western Australia) and the lowest price stated was $0.98 each (Coles and Woolworths, multiple states).
- The retail price range for sweet corn on the 17th of July 2013 was $0.52.

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

Spontaneous Varietal Awareness & Purchase

Sweet Corn



- The majority of respondents who purchased sweet corn could not recall a variety they are aware of (75%).
- Of those that were aware, sweet corn and baby corn were the most recalled varieties.

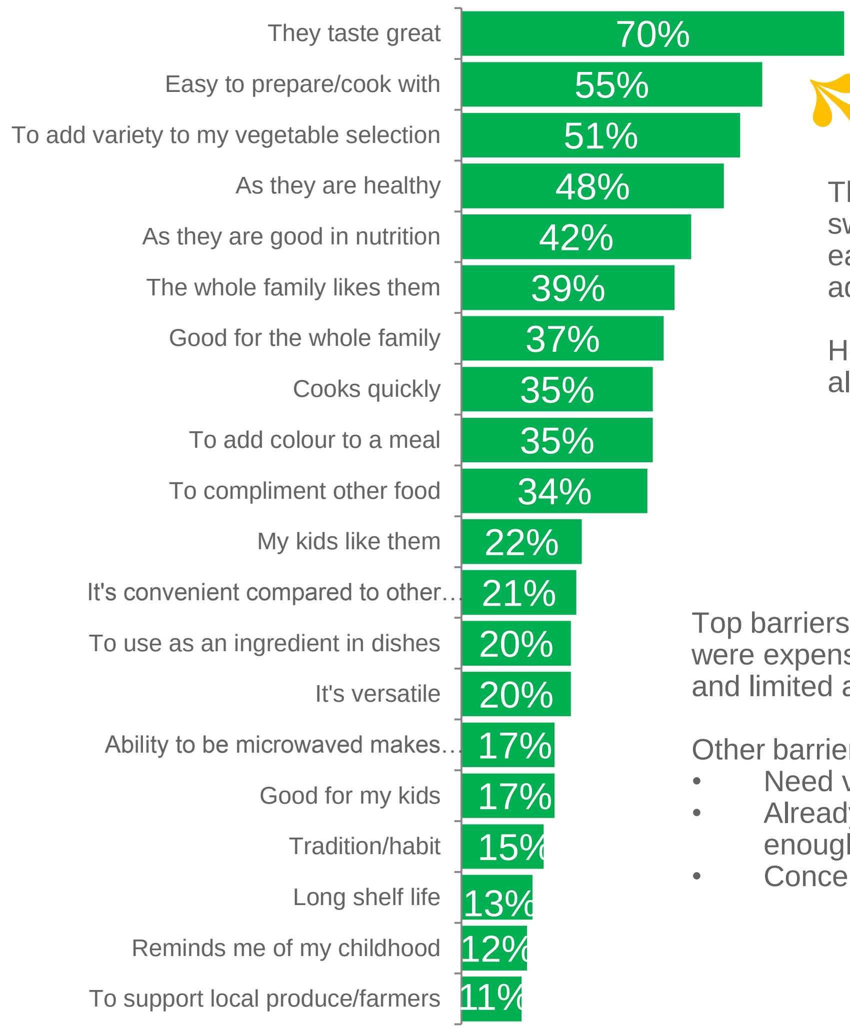
N=506

Q6a. What varieties of <commodity> are you aware of? (unprompted)

Triggers & Barriers to Purchase

Sweet Corn

Triggers



The top drivers to purchase of sweet corn were tasting great, easy to cook/prepare with and adding variety to diet.

Heath/nutrition attributes were also core drivers to purchase.

Top barriers to purchase sweet corn were expensiveness, short shelf life and limited availability.

Other barriers mentioned were:

- Need variety
- Already purchase & consume enough
- Concerned about health/GMO

Barriers

N=509

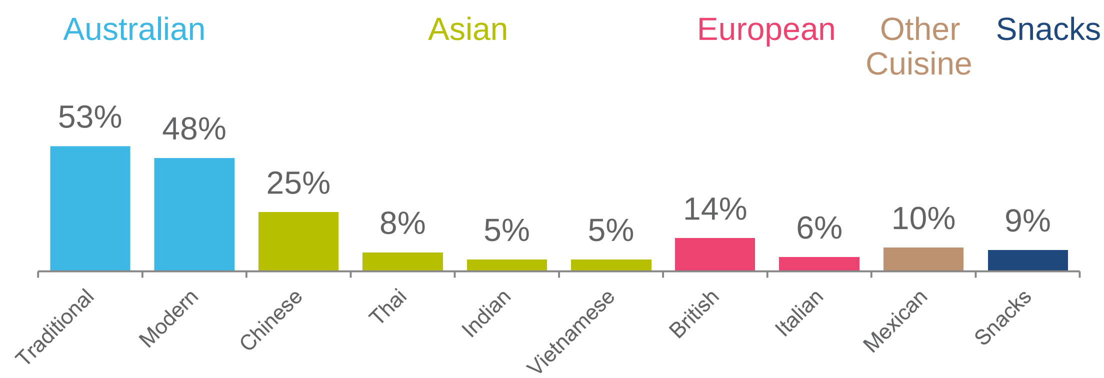
Q7. Which of the following reasons best describes why you purchase <commodity>?

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

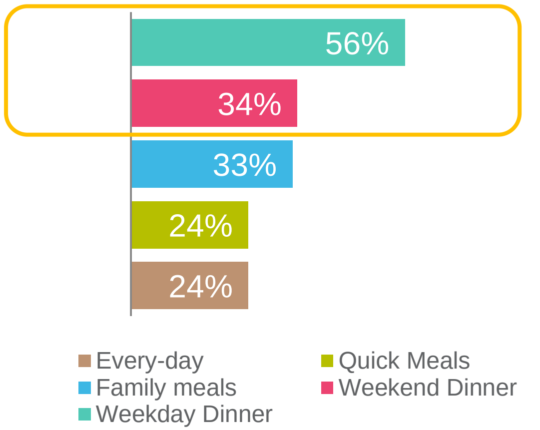
Cooking Preferences & Occasions: Sweet Corn

- Australian followed by Chinese cuisine were the favourite when cooking sweet corn.
- Dinner was the highest stated consumption occasion.
- Boiling, steaming and microwaving were the top methods stated for cooking sweet corn.
- Carrots, potatoes and green peas were the favoured accompanying vegetables in meals.

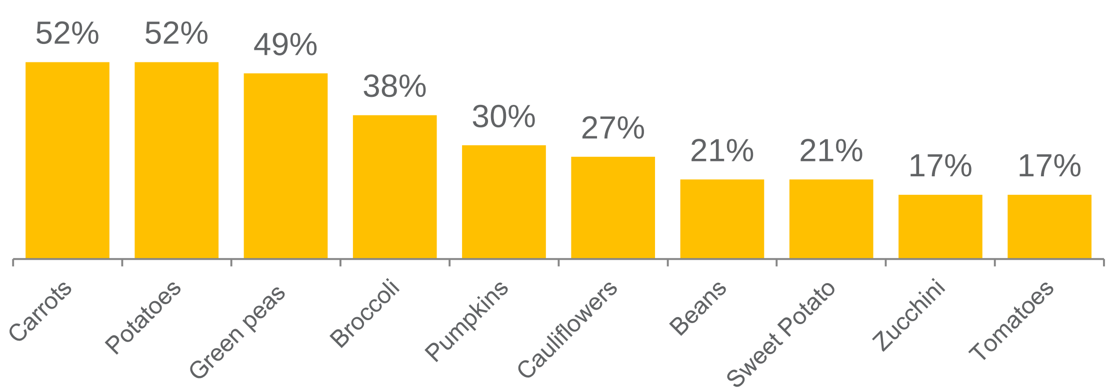
Typical Cuisine Cooked



Top 5 Consumption Occasions



Top 10 Accompanying Vegetables

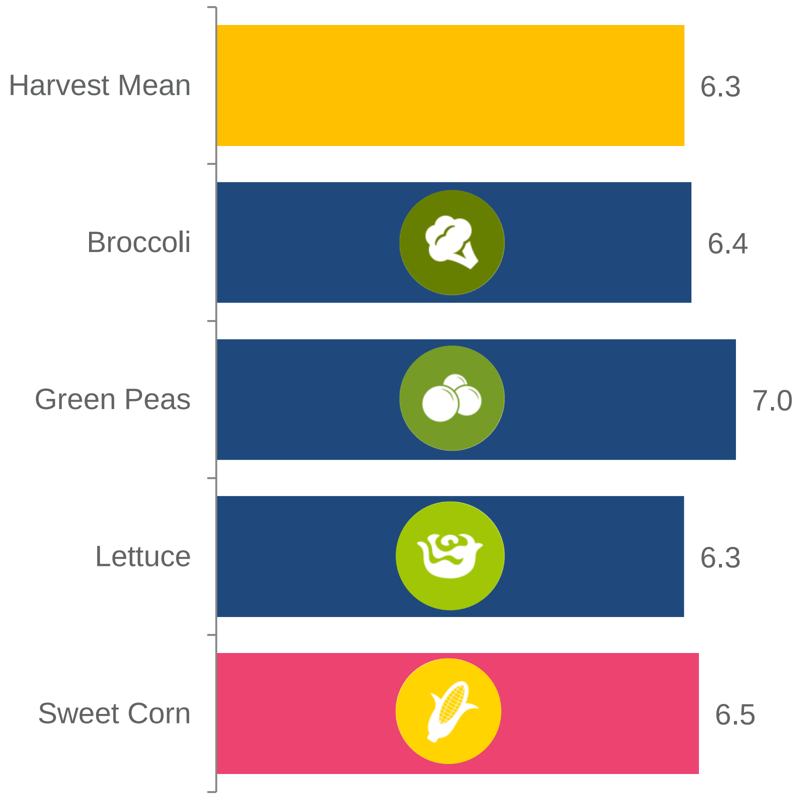


Top 10 Cooking Styles	
Boiling	56%
Steaming	41%
Microwave	29%
Stir frying	17%
Soup	12%
Roasting	11%
Grilling	8%
Frozen	6%
Raw	5%
Baking	5%

N=509
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 sweet corn was relatively important to respondents.



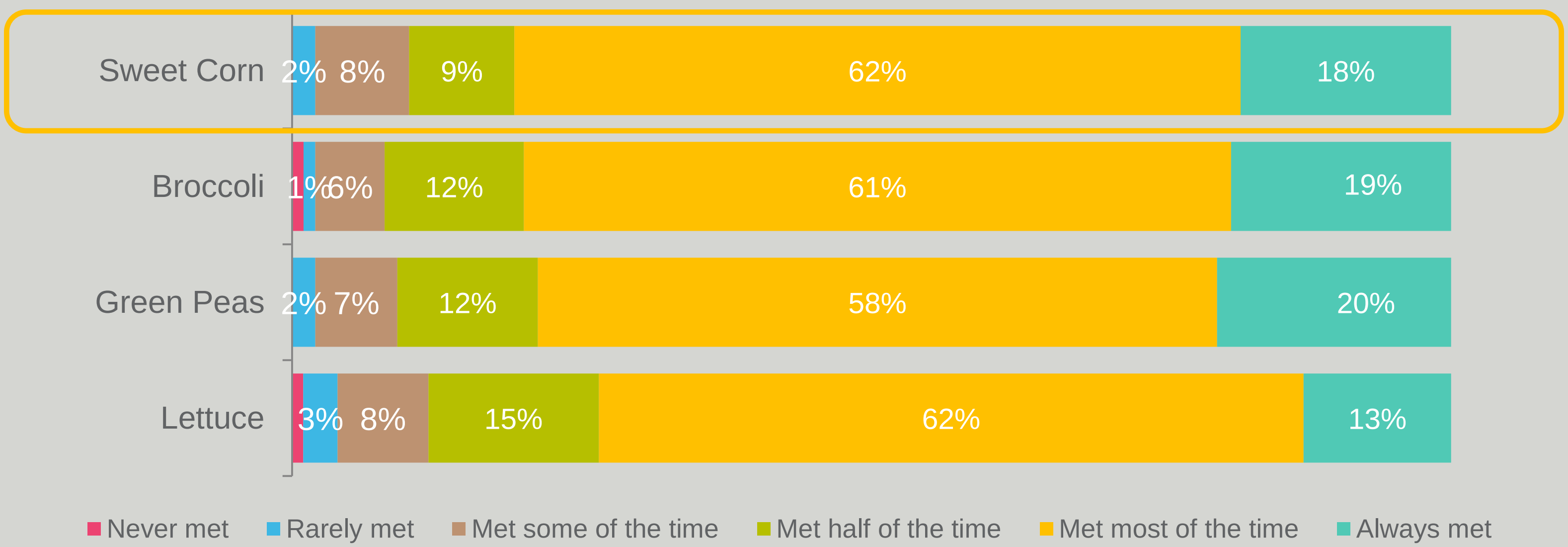
Q14. When purchasing <commodity>, how important is Provenance to you?
Broccoli N=525
Green Peas N=503
Lettuce N=512
Sweet Corn N=509

Freshness and Longevity: Sweet Corn

Expected to stay fresh for **7.6 days**

- Sweet corn was expected to stay fresh for over a week after purchase.
- 18% of respondents stated freshness was always met whilst 62% stated it was met most of the time.
- 19% stated that cauliflower freshness was met at best only half of the time.

Expectations Met



N=512
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> ?

Sweet Corn

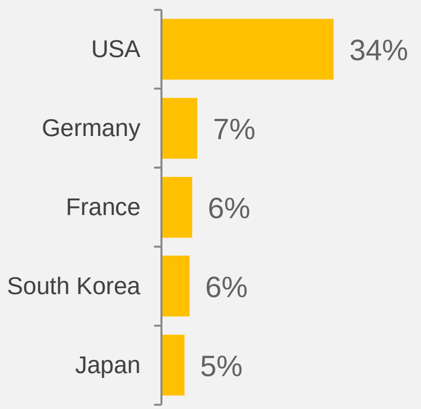
*Mintel search term was Corn

Sweet Corn Global NPDs

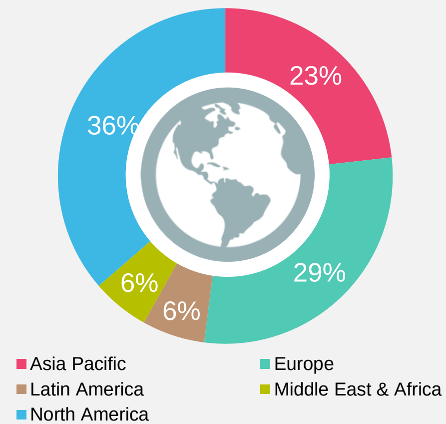
April–June 2013

There were 198 new products launched globally over the last 3 months that contained sweet corn as an ingredient. The majority of launches occurred in North America, Europe and the Asia Pacific. The top categories launched were meals, snacks and bakery goods.

Country

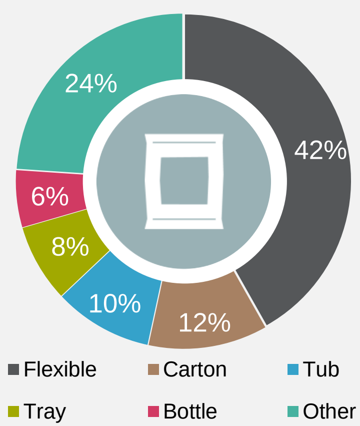


Region



198 Global NPDs

Top Pack Formats



Categories

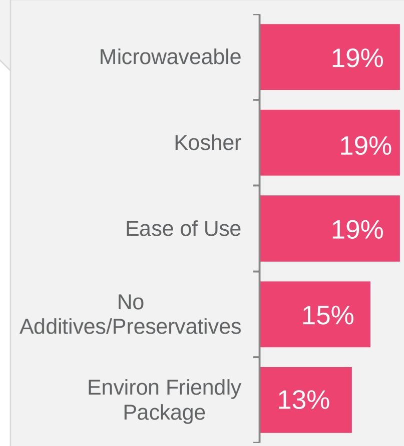
Meals 23%

Snacks 16%

Bakery 15%

Fruit & Vegetables 6%

Top Claims



Sweet Corn Product Launches:
Last 3 Months (April-June 2013)
Summary

- There were 198 products launched in the last 3 months globally that contained sweet corn as an ingredient. None of these products were launched in Australia.
- North America (36%) and Europe (29%) were the top 2 regions for launches.
- Flexible packaging was the most common pack format used for new launches (42%).
- The top categories for launches were meals (23%), snacks (16%) and bakery goods (15%).
- The core claims used globally were ease of use (19%), kosher (19%) and microwaveable (19%).
- The most innovative products launched were a sweet pumpkin and corn tea and a corn juice (examples of these can be found in the following pages).

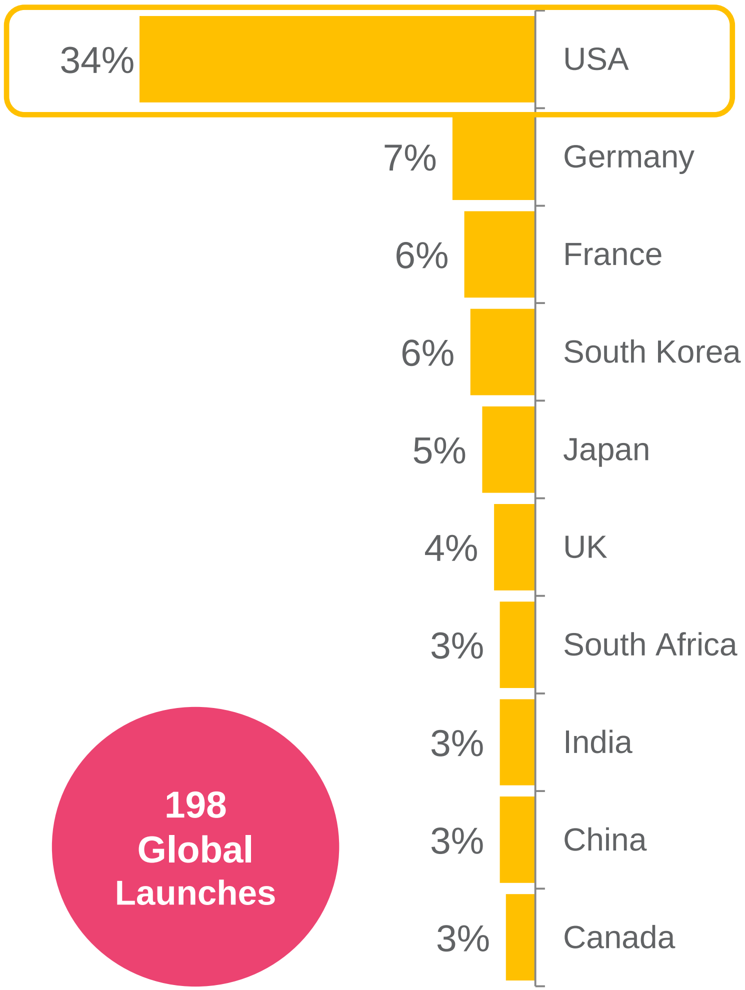
Source: Mintel (2013)

Sweet Corn SKUs

Country, Region & Categories

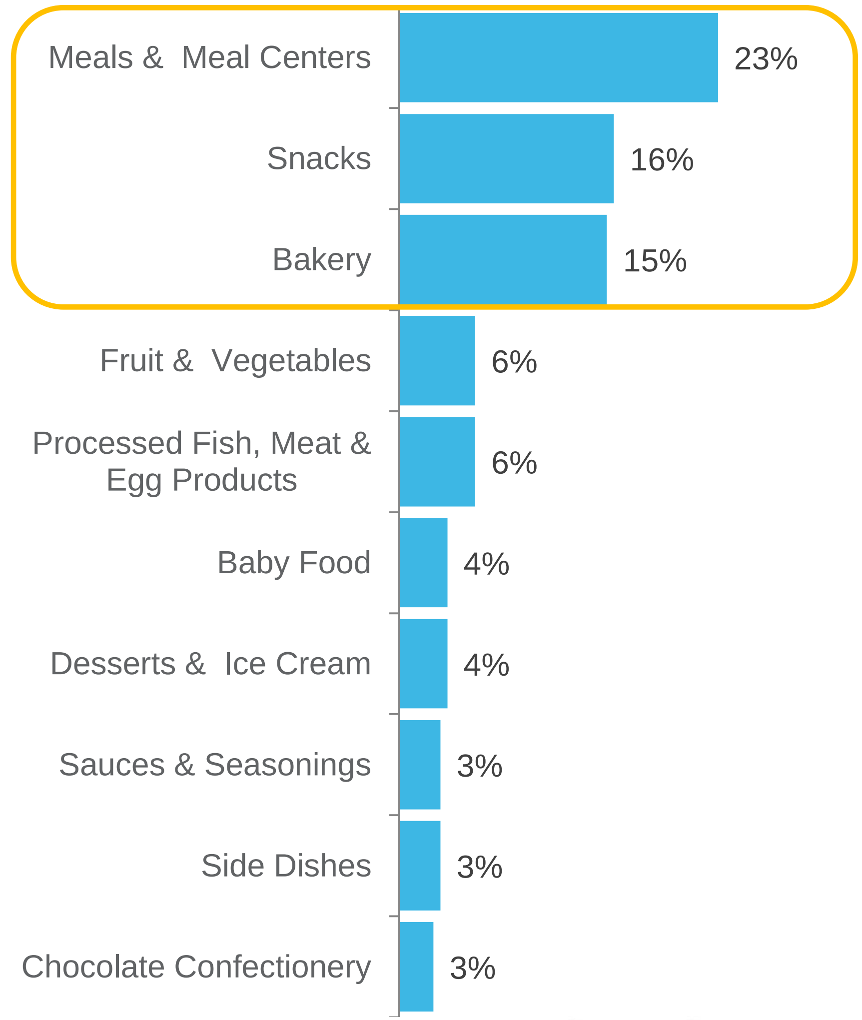
- The most active country for launches in the last 3 months was the USA.
- The main categories for launch were meals, snacks and bakery goods.

Top 10 Launch Countries



198 Global Launches

Top 10 Launch Categories



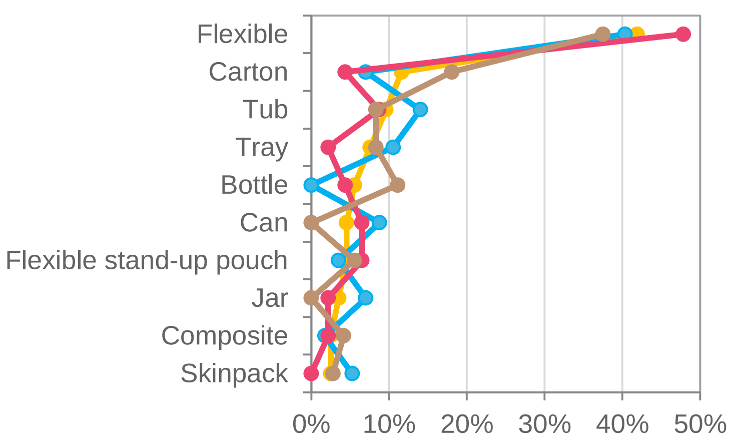
Number of Global Sweet Corn NPD for the L3M N=198

Sweet Corn Launches

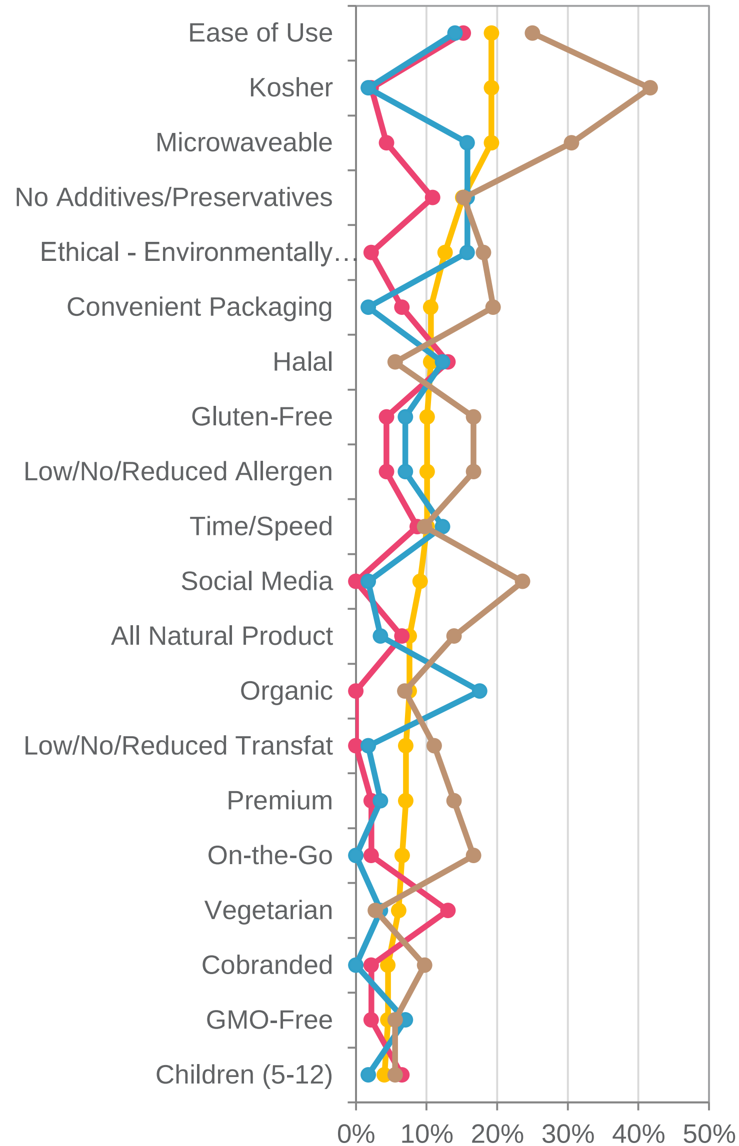
Top Claims & Pack Formats Used

- The top claims used for products launched were ease of use, being kosher and microwaveable.
- The top pack formats used for launches were flexible packaging, carton and tub.

Top Packs Launched



Top Claims Launched



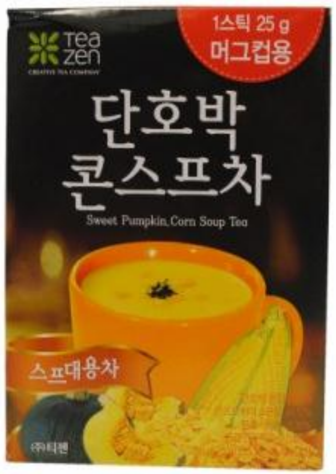
Global N=198
Asia Pacific N=46
Europe N=57
North America N=72

Number of Global Sweet Corn NPD for the L3M N=198
Only regions with n >30 are displayed

Innovative Sweet Corn Launches:
L3M (April-June 2013)

Tea Zen Sweet Pumpkin Corn Tea (South Korea)

Tea Zen Sweet Pumpkin Corn Tea is said to be a soup substitute that contains corn base powder and sweet pumpkin powder. It is claimed to be ideal for a quick and easy breakfast. The product can be prepared hot or cold and retails in a 250g pack with 10 x 25g sachets.



Claims:
Ease of Use, Time/Speed

Po-Nashomu Corn Sticks in Caramel (Ukraine)

Po-Nashomu Kukurudzyani Palichki v Karameli (Corn Sticks in Caramel) are free from dyes, preservatives and GMO. The ready to eat, economy product retails in a 75g pack.

Claims:
Ease of Use, No Additives/Preservatives, Economy, GMO-Free

Godrej Tyson Real Good Yummiez Cheese Corn Nuggets (India)

Godrej Tyson Real Good Yummiez Cheese Corn Nuggets have been repackaged with an updated design. The product is suitable for vegetarians, is made with real cheese and corn, and is ready to cook. These nuggets are prepared with the highest quality processed cheese and American corn, can be deep-fried or tava grilled, and can be cooked from frozen

Claims:
Ease of Use, Vegetarian

Bearitos Veggie Baked Corn Puffs (USA)

Bearitos Veggie Baked Corn Puffs are made with organic corn and real vegetables and are free of genetically modified ingredients. This certified kosher product retails in a 4-oz. pack featuring the Non-GMO Project logo.

Claims:
Organic, Kosher, GMO-Free

Source: Mintel (2013)

Innovative Sweet Corn Launches:
L3M (April-June 2013)

Gong Xiang Wei Lai Corn Juice (China)

Gong Xiang Wei Lai Yu Mi Zhi Yin Liao (Corn Juice) is described as a healthy drink. This product retails in a 1L pack.

Claims:
N/A

Mr Organic Organic Sweetcorn (Germany)

Mr Organic Bio Zuckermais (Organic Sweetcorn) contains no added salt or sugar and is gluten free. Suitable for vegans and vegetarians, this product is cooked and ready to eat. The sweetcorn retails in a 326g recyclable pack.

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

CP Chicken Corn Stick Nuggets (Thailand)

CP Chicken Corn Stick Nuggets are now available. This product contains no MSG or preservatives added, and is halal certified. It retails in a 200g pack.

Claims:
Halal, No Additives/Preservatives

Farmland Snow White Corn (Singapore)

Farmland Snow White Corn is said to feature extraordinary sweetness. The USA finest grade corn is from sustainable farming to minimise the impact to the environment. The certified halal product is free from cholesterol and retails in a 400g pack.

Claims:
Halal, Low/No/Reduced Cholesterol, Ethical - Environmentally Friendly Product

Source: Mintel (2013)

Innovative Sweet Corn Launches:
L3M (April-June 2013)

Lady Liberty Macadamia Gourmet Popcorn Clusters (India)

Lady Liberty Macadamia Gourmet Popcorn Clusters with Macadamia Nuts & a Caramel Glaze are now available. The product is suitable for vegetarians, and retails in a 227g resealable pack.

Claims:
Convenient Packaging, Vegetarian

Fujipan Breakable Corn Bun (Japan)

Fujipan Breakable Corn Bun is a pastry filled with 'super sweet corn' filling. The bun may be broken down into pieces with the hands. It is available exclusively in Tohoku and Kanto region. It was launched on 1st March, 2013, for 126 yen.

Claims:
Limited Edition

Mom To Mom Sharing Wisdom Sweet Potato, Corn & Apple Baby Food (USA)

Mom To Mom Sharing Wisdom Sweet Potato, Corn & Apple Baby Food is available in a 4-oz. BPA free pouch. This kosher certified product is a stage 2 food and is suitable for babies older than six months. The product is 100% natural and contains pure fruit and vegetables in a convenient and portable pack.

Claims:
Babies & Toddlers (0-4), All Natural Product, Kosher, On-the-Go, Convenient Packaging

Nabisco Corn Chips Salt Flavour Corn Chips (Japan)

Nabisco Corn Chips Shio Aji (Salt Flavour Corn Chips) is a new extension to the series. It offers crispy salted corn-flavoured chips. The product retails in a 115g tube pack.

Claims:
N/A

Source: Mintel (2013)

In the Media.

General Vegetable News (May-July 2013)

- Vegetable prices drop in northern Queensland because of oversupply. Crop value below that of production costs (www.abc.net.au).
- Consumer Price Index for vegetables has risen by 3.3% for June quarter.
- The Greens announced an $85 million package that they claim will help farmers bypass the 2 major supermarkets (www.abc.net.au).

Commodity News
(May- July 2013)

- No relevant articles were found for green peas in the last 3 months.

- Oxford Press reports that freshness is key to finding the best sweet corn. This is because the sugar turns to starch quickly after harvesting.
- Peak season in the USA. Festivals held in honour of the humble vegetable.

- Lettuce is the USA's biggest vegetable crop, $US1.6 billion annually (Gizmodo Australia).
- McDonald's use lettuce in global marketing campaign to highlight freshness of ingredients (Coloribus).
- Lettuce grows better in the winter, even though the consumer perceives it as a summer and salads vegetable (abc.net.au)

- Barack Obama, US President and Kevin Rudd declared broccoli as a favourite vegetable.
- Good quality and value broccoli available in stores this July (as reported in Herald Sun).
- New species of Broccoli developed in the UK that protects against heart disease and cancer.

Thanks.