# Horticulture Australia and AUSVEG.

## VG12078 Project Harvest.

**Monthly Tracker Report Wave 1: June 2013**

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colmar brunton.

# Contents



# Background & Methodology.

# Background
# & Setting the Scene.

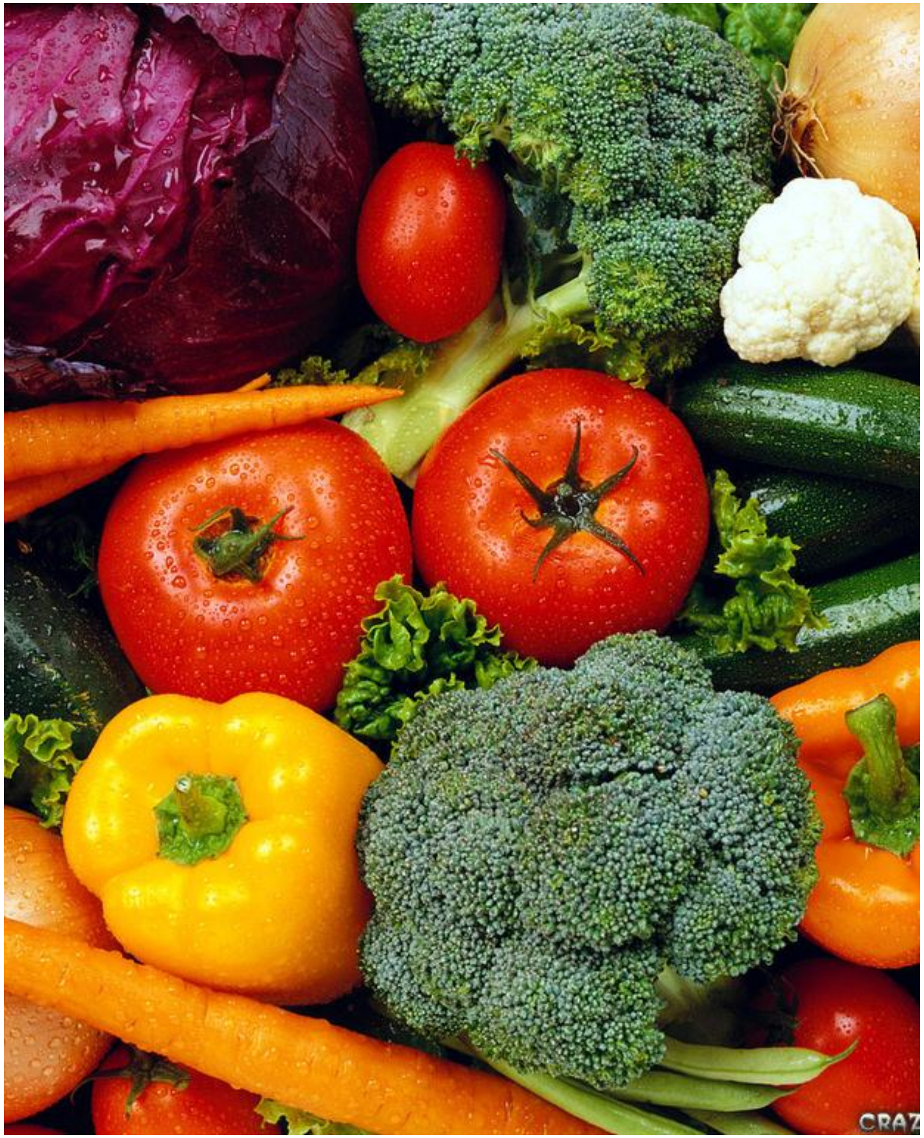
There is an increasing need in Australia's Horticulture Industry to monitor and gauge consumer perception and behaviour in relation to fresh vegetables.

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

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

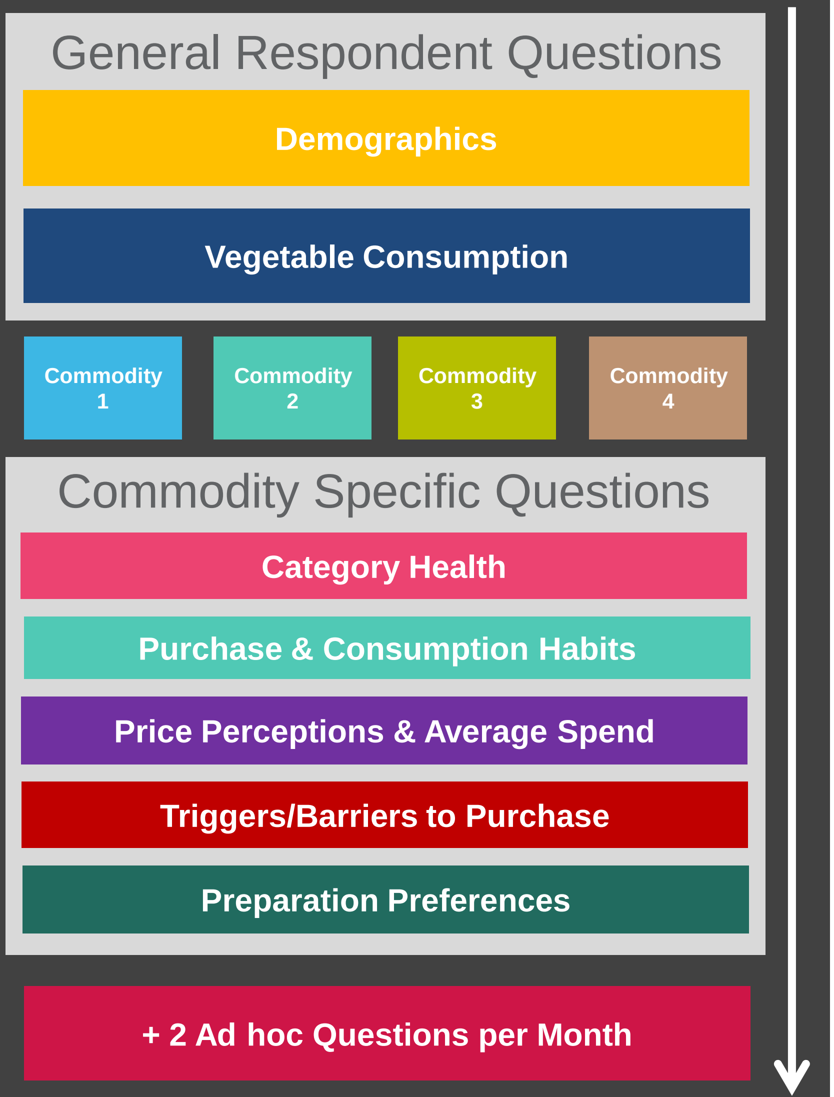
This wave's report (W1) focuses on:

- Beans
- Carrots
- Cauliflowers
- Pumpkins



# 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, 911 respondents completed the questionnaire. Respondents represented all States and Territories, as well as both metro and rural areas.

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

To qualify for the questionnaire, respondents...

⇛Were aged 18 years and over

⇛Purchased fresh vegetables at least once a month

⇛Purchased at least one of the monthly commodities (Bean, Carrot, Cauliflower or Pumpkin) within the last month

⇛Were the main or joint grocery buyer

| | Total N=911 | Bean n=506 | Carrot n=511 | Cauliflower n=508 | Pumpkin n=513 |
|---|---|---|---|---|---|
| **Gender** | | | | | |
| Male | 41% | 39% | 38% | 38% | 38% |
| Female | 59% | 61% | 62% | 62% | 62% |
| **Age** | | | | | |
| 18-24 y.o. | 13% | 14% | 12% | 13% | 12% |
| 25-34 y.o. | 28% | 26% | 29% | 28% | 29% |
| 35-44 y.o. | 14% | 15% | 13% | 13% | 11% |
| 45-54 y.o. | 16% | 17% | 17% | 15% | 17% |
| 55-64 y.o. | 14% | 14% | 14% | 12% | 14% |
| 65+ y.o. | 16% | 13% | 16% | 18% | 17% |
| **Household** | | | | | |
| Single Income no Kids | 24% | 21% | 25% | 21% | 21% |
| Double Income no kids | 20% | 20% | 20% | 19% | 19% |
| Young Families | 20% | 23% | 18% | 20% | 22% |
| Established Families | 17% | 17% | 18% | 18% | 19% |
| Empty Nesters | 19% | 20% | 20% | 21% | 20% |
| **Location** | | | | | |
| New South Wales | 32% | 32% | 32% | 31% | 33% |
| Victoria | 21% | 24% | 16% | 20% | 19% |
| South Australia | 11% | 10% | 14% | 11% | 12% |
| Queensland | 21% | 21% | 21% | 23% | 22% |
| Western Australia | 9% | 8% | 11% | 10% | 9% |
| Tasmania | 2% | 2% | 3% | 2% | 3% |
| Australian Capital Territory | 2% | 3% | 2% | 3% | 2% |
| Northern Territory | 0% | 0% | 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.

# Wave 1:
# Executive Summary

# Wave 1: Top 5 Insights

- Awareness of variety and species of commodities is low. With trends showing growing appeal for both varietal information and provenance, opportunity exists to educate consumers on these aspects to help negate the threat of imported produce.
- Commodities that displayed higher interest in new varieties (Beans and Pumpkin) also displayed increase in future purchase intent. Introduction of new varieties may provide retail growth.
- Trends show greater future interest in other cuisines, particularly Asian. With Australian cuisine currently dominating cooking repertoire, it is important to prevent reduced commodity purchase due to lack of awareness of each commodity's versatility. Education on versatility across cuisines is needed.
- Inconsistency of shelf life (especially soft vegetables), is linked to key barriers to greater purchase. To increase consumption, a high consistency of in-store freshness and quality needs to be provided.
- Australia appears behind in innovation including this month's tracked vegetables. Global trends indicate largely untapped potential to grow demand for produce over and above what may be attained through general meal consumption.

# Wave 1: Fact Base
(1 of 2)

## Pumpkin:

Of the vegetables tracked this month, pumpkin had the highest level of importance, satisfaction and endorsement for consumers.

Those that purchase pumpkin do so on average **3.0** times a month. They consume it on average **8.3** times a month.

Purchasers of pumpkin perceive the product to be of good value. They typically purchase half cut pumpkins of which only **1 unit** on average is purchased. The average amount they purchase is **1.4kg**.

Our price tracking for June 2013 states that the average price for 1kg of butternut pumpkin nationally is **$2.56 a kilo** (this is the average for whole pumpkin purchases.)

Awareness and recall of pumpkin varieties is much higher than other vegetable commodities. The most recalled varieties were butternut and jap pumpkins.

On average pumpkin is expected to stay fresh for at least **12 days** after purchase.

Top triggers to purchasing pumpkin are taste, being healthy and adding variety to vegetables eaten. Top barriers are inconvenient to prepare, size (hard to store) and cost.

## Carrot:

The carrot category is positively perceived by consumers with healthy scores for importance, satisfaction and endorsement.

Those that purchase carrots do so on average **4** times a month. They consume them on average **13.8** a month.

Consumers perceive carrots to be very good value. On average they purchase **1.2kgs** of carrots per purchase occasion and perceive that amount to cost them **$2.80**. The most common format for purchasing carrots is in small prepacked bags.

Our price tracking for June 2013 states that the average price for 1kg of carrots (individually selected) nationally is **$1.93** a kilo.

Awareness of the varieties of carrots consumers purchase is very low. They differ the varieties based on size and colour.

On average consumers expect carrots to stay fresh after purchase for **12.3 days**.

The top triggers to purchasing carrots are being healthy (nutritious), being easy to cook/prepare and taste. The top barriers to purchase are poor quality and short shelf life.

# Wave 1: Fact Base
(2 of 2)

## Cauliflower:

Of all commodities tracked this month, the cauliflower category had the lowest category health scores. Importance, satisfaction, endorsement and interest in new varieties are below average for FMCG/fresh vegetable categories.

Those that purchase cauliflower do so on average **2.9** times a month. They consume them on average **7.3** times a month.

Consumers perceive cauliflower to be of good value. On average they purchase 1kg of cauliflower per purchase occasion and expect it to cost them **$3.00.** The most common format to purchase cauliflower is whole.

Our price tracking for June 2013 states that the average price for a whole cauliflower nationally is **$3.34 each**.

Awareness of varieties of cauliflower is very low. Those that could identify a variety did so by stating a colour (white or purple).

On average consumers expect cauliflower to stay fresh after purchase for **8.6 days**.

The top triggers to the purchase of cauliflower are health benefits, adding variety to vegetables purchased, taste and ease of cooking/preparation. The top barriers stated were expensive and size (too hard to store).

## French & Runner Beans:

Consumers have good perceptions of the French and runner beans category with healthy scores in importance, satisfaction and endorsement.

Those that purchase French and runner beans do so on average **3.8** times month. They consume them on average **8** times a month.

Consumers perceive French and runner beans to be good value. On average they purchase 0.9kg per purchase occasion. They expect 1 kilo of French and runner beans to cost them **$3.80**. This is substantially lower than retail prices.

The most common format for purchasing French and runner beans is individually (loose format).

Awareness of varieties of French and runner beans is very low. Those that could recall varieties typically recalled “green” beans.

On average consumers expect French & runner beans to stay fresh for **7.3 days**. Of all commodities tracked this month French and runner beans had the lowest expectation of freshness.

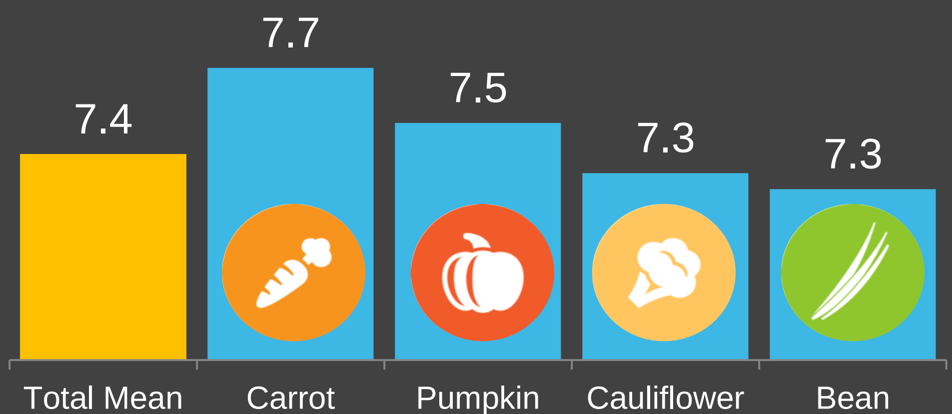
The top triggers to French and runner bean purchases is being healthy (nutritious), easy to cook/prepare with and adding variety to vegetables consumed. The top barriers to purchase is short shelf life and expensive.

# Wave 1:
# Ad-Hoc Questions

# Additional Monthly Questions Asked:
## Relevance of prepared vegetables & Preparation Cooking Knowledge

- Respondents indicated that pre-prepared, cut or peeled vegetables were of moderately low relevance to them (4.0/10). Pre-prepared formats were more relevant for younger consumers 25-34 yrs. (4.5/10) than older 65+ yrs. consumers (3.3/10).
- Overall, consumers feel that they are competent in cooking and preparing carrots, pumpkins, cauliflowers and beans. This was consistent across all vegetables.
- Respondents indicated greatest cooking knowledge and preparation for carrots. This is unsurprising as were the most frequently purchased vegetable last month.

### Preparation & Cooking Knowledge

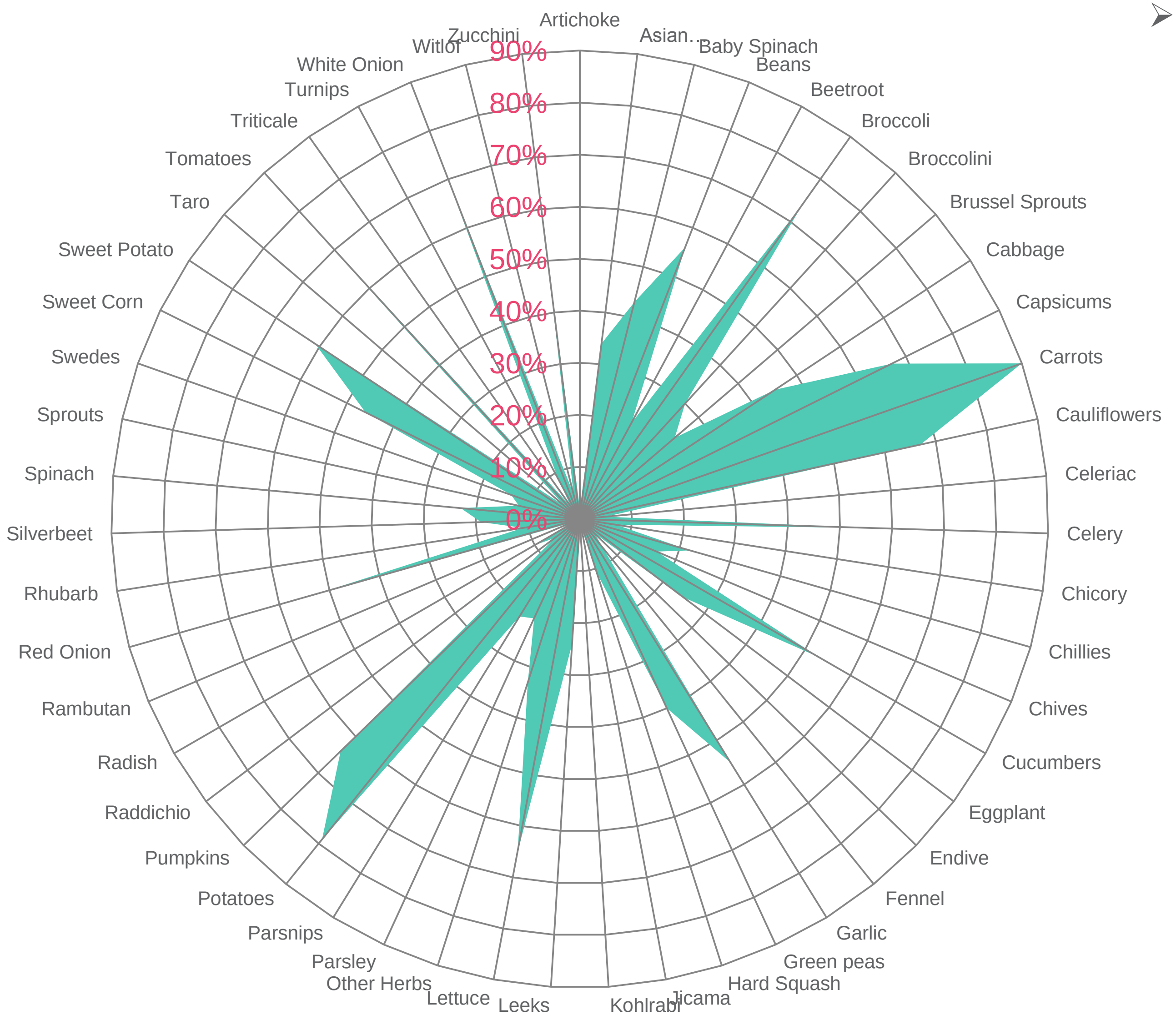



AH1. In general, how relevant are pre-pared/cut/peeled vegetables to you (N=911)
AH2. To what extent do you feel as though you know enough about how to cook and prepare them?

# Wave 1: Overall Vegetable Tracking

# Vegetables Purchased Last Month






- Hard vegetables dominated last month’s purchase being strongly led by purchase of carrots, potatoes, sweet potatoes, and pumpkin.

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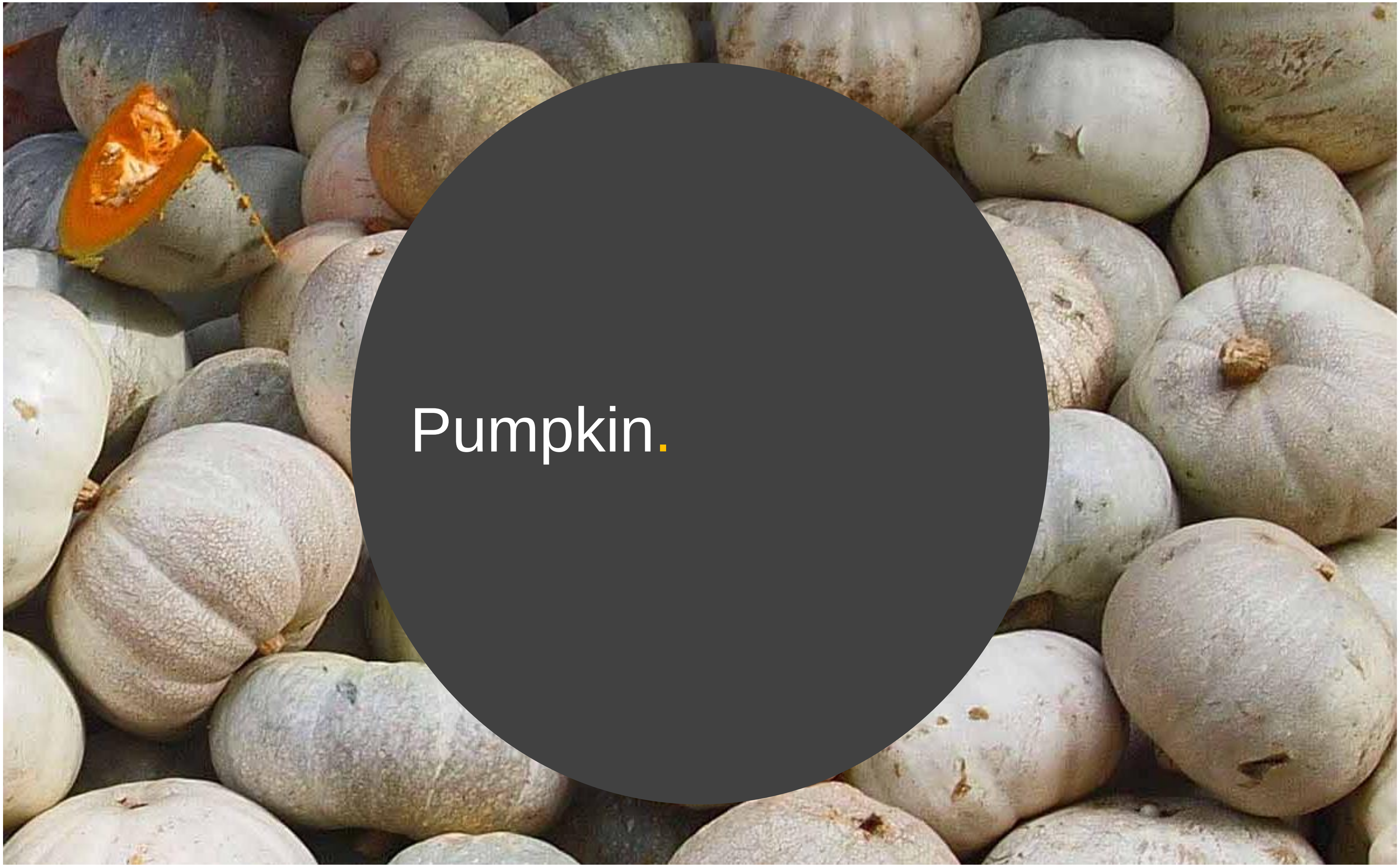
Total Sample N=911
S8. Which of the following fresh vegetables have you purchased in the last month?

# Category Health

- Of the commodities tracked this month pumpkin is considered to be the most important vegetable commodity. It also had the highest score for satisfaction and endorsement.
- Beans and carrots also had positive category health scores for these measures, albeit not as strong.
- Of the 4 commodities tested cauliflower had the weakest category health scores. This was especially true for importance and interest in new varieties.
- French and runner beans had the highest proportion of respondents stating they would purchase more in the future (15%).

| | Pumpkin | French & Runner Beans | Carrot | Cauliflower | Harvest Total Mean |
|---|---|---|---|---|---|
| Importance | 6.5 | 6.0 | 5.2 | 4.8 | 5.6 |
| Satisfaction | 6.8 | 6.4 | 6.6 | 6.5 | 6.6 |
| Endorsement | 7.0 | 6.7 | 6.7 | 6.3 | 6.7 |
| Interest (New Varieties) | 6.0 | 6.1 | 5.5 | 5.3 | 5.7 |
| Future Purchase | | | | | |
| More | 12% | 15% | 8% | 8% | 11% |
| Same | 86% | 82% | 91% | 89% | 87% |
| Less | 2% | 3% | 1% | 2% | 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.


Pumpkin.

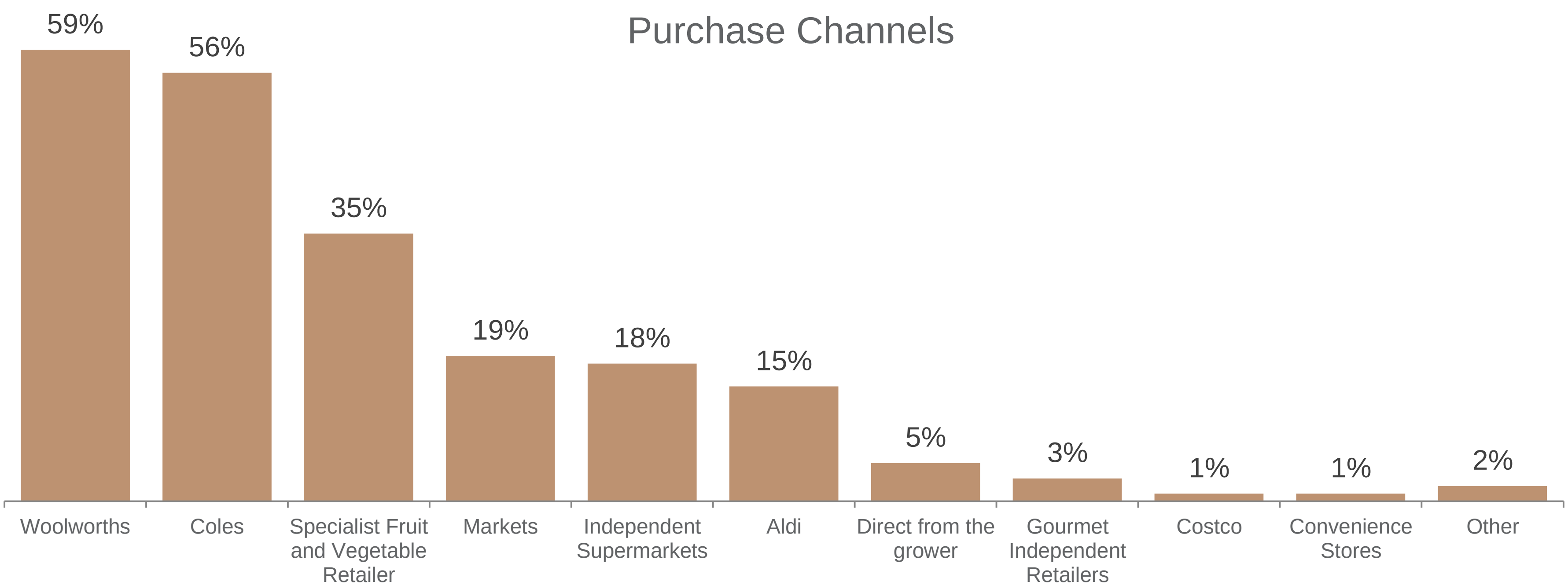
# Purchase and Consumption Behaviour

## Pumpkin

Average Purchase **3.0** times per month

Average Consumption **8.3** times per month

- Pumpkin was most commonly purchased via mainstream retail channels (Woolworths and Coles).
- Over a third of respondents purchased pumpkin from specialist vegetable retailers.
- Respondents indicated that they consumed pumpkin over 8 times a month and purchased pumpkin 3 times a month indicating it is likely perceived as a multi-portion commodity




Q1. On average, how often do you purchase pumpkin?
Q2. On average, how often do you consume pumpkin?
Q5. From which of the following channels do you typically purchase pumpkin?
Sample N=513

# Average Spend & Price Sensitivity

## Pumpkin

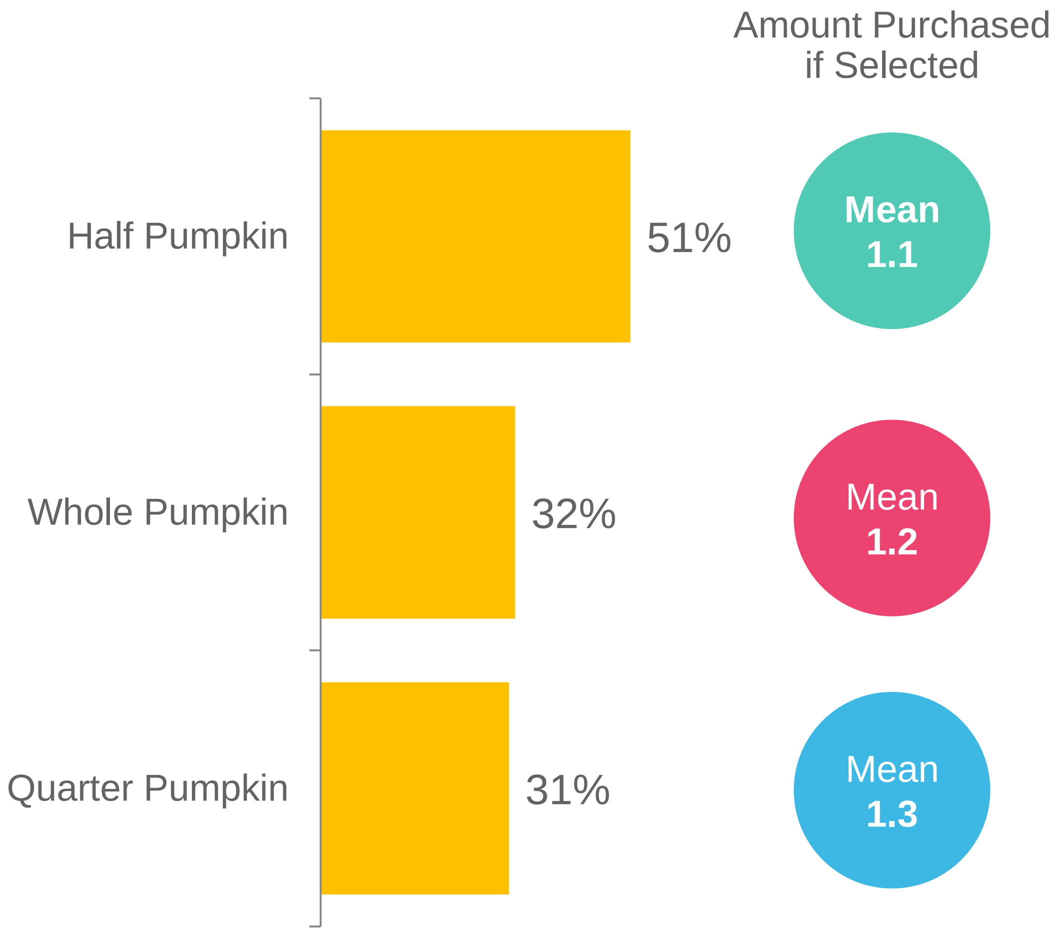
⇒ The average consumer typically purchased **1.4kg** of Pumpkin.

⇒ The average recalled last spend was **$3.10.**


⇒ On average, consumers perceived Pumpkin to be good value **(6.8/10).**

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

# Pack Formats Purchased
## Pumpkin

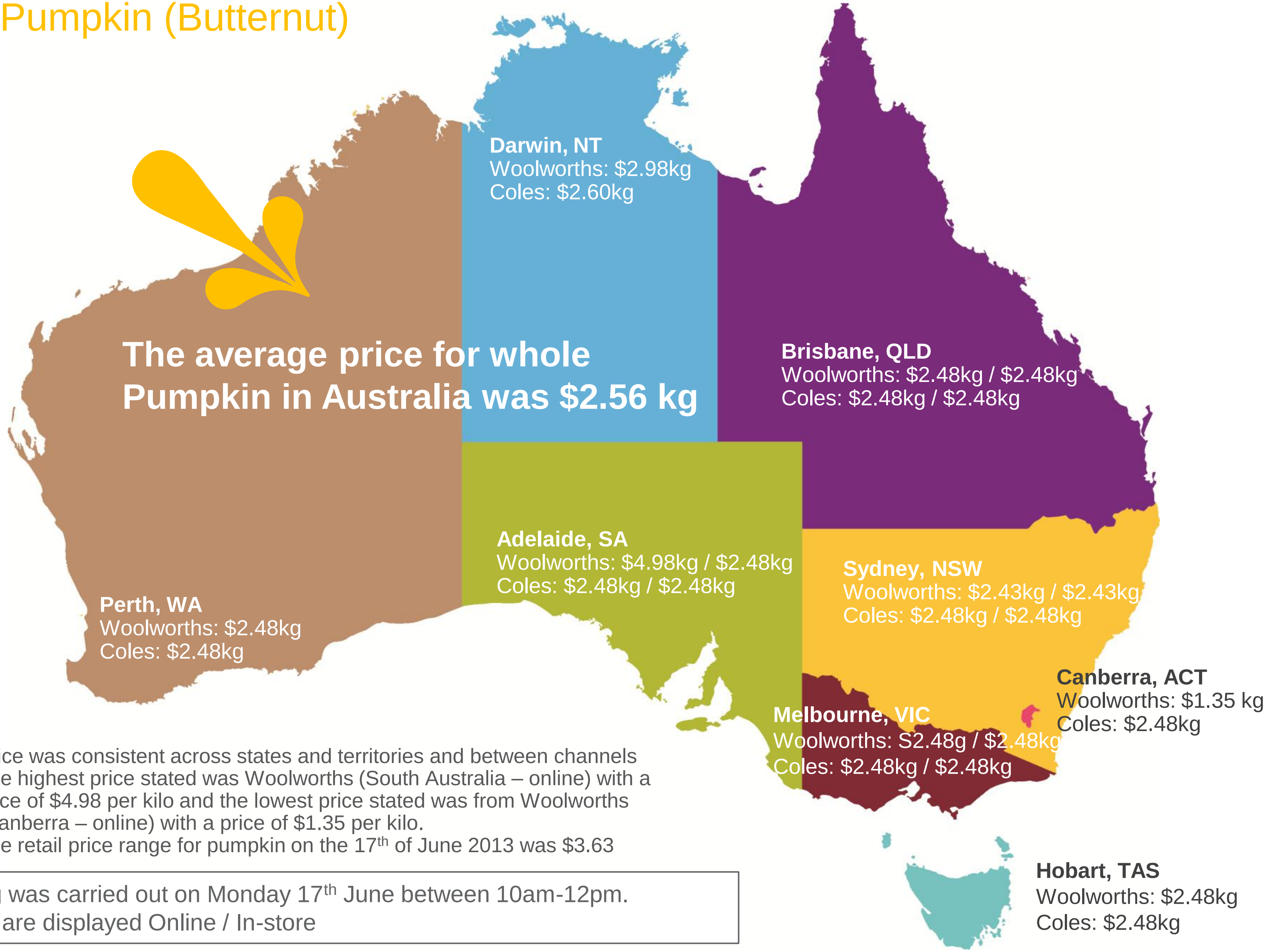



- Half pumpkins is the most common format of pumpkin purchased (51%).
- The mean values show us that 1 unit is typically purchased regardless of format, meaning each has its place in terms of consumer demand.

Q3a. How much pumpkin does this typically equate to?

# Online and In-store Commodity Prices

## Pumpkin (Butternut)

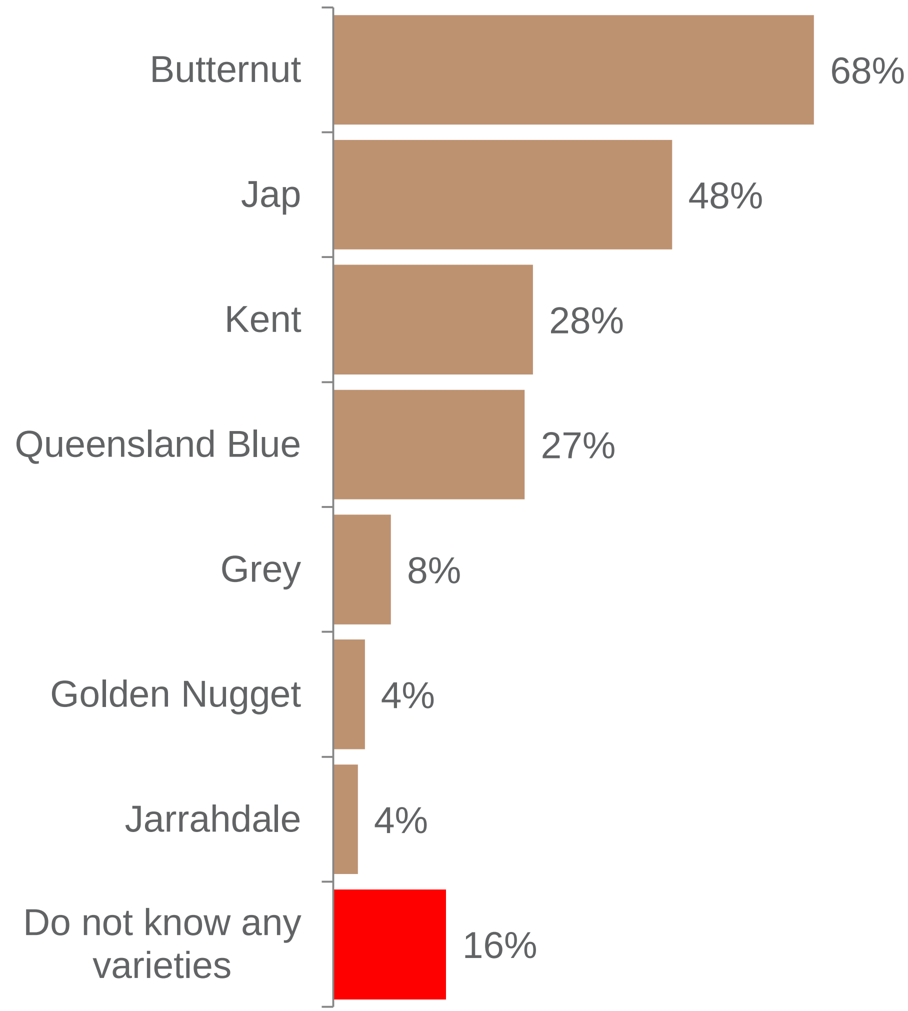



- Price was consistent across states and territories and between channels
- The highest price stated was Woolworths (South Australia – online) with a price of $4.98 per kilo and the lowest price stated was from Woolworths (Canberra – online) with a price of $1.35 per kilo.
- The retail price range for pumpkin on the 17th of June 2013 was $3.63

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

# Spontaneous Varietal Awareness & Purchase
## Pumpkin

- Butternut & Jap pumpkin had the highest levels of awareness.
- Relative to other vegetable commodities pumpkin has a high level of varietal awareness with only 16% of respondents who purchased pumpkin in the last month not able to recall any specific varieties.

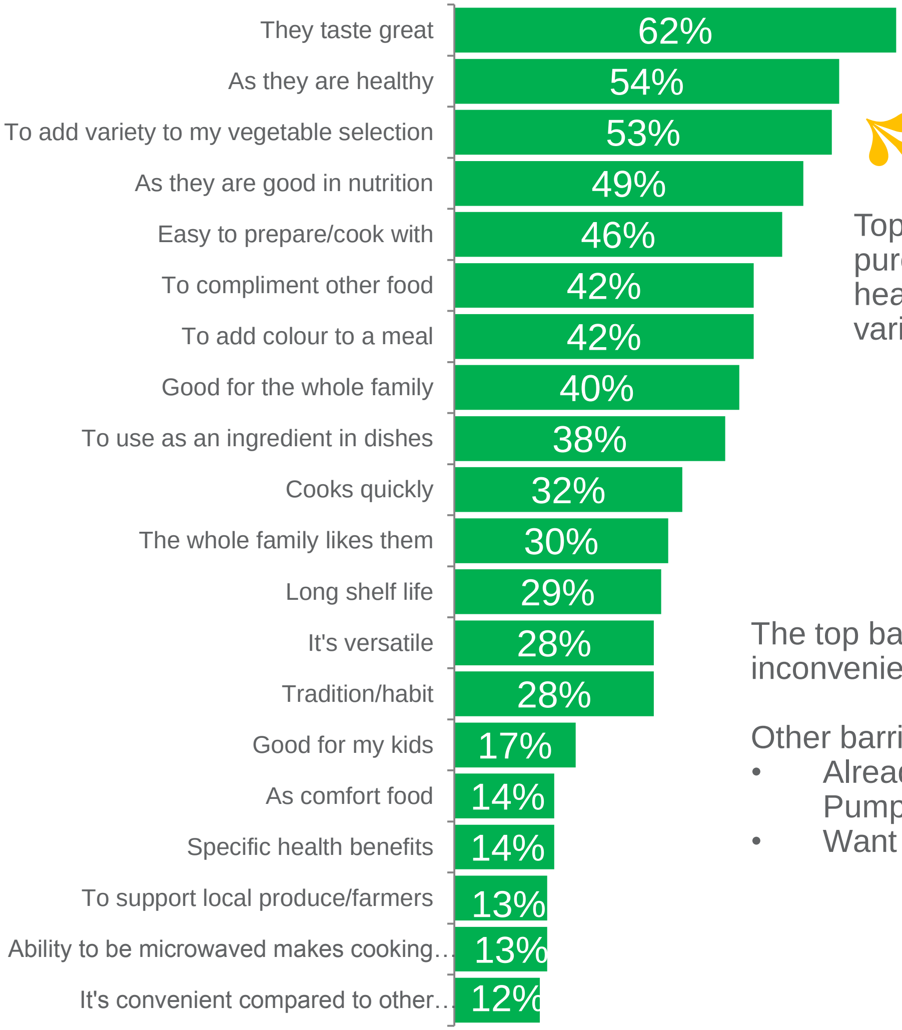



N=513
Q6a. What varieties of pumpkin are you aware of? (unprompted)

# Triggers & Barriers to Purchase

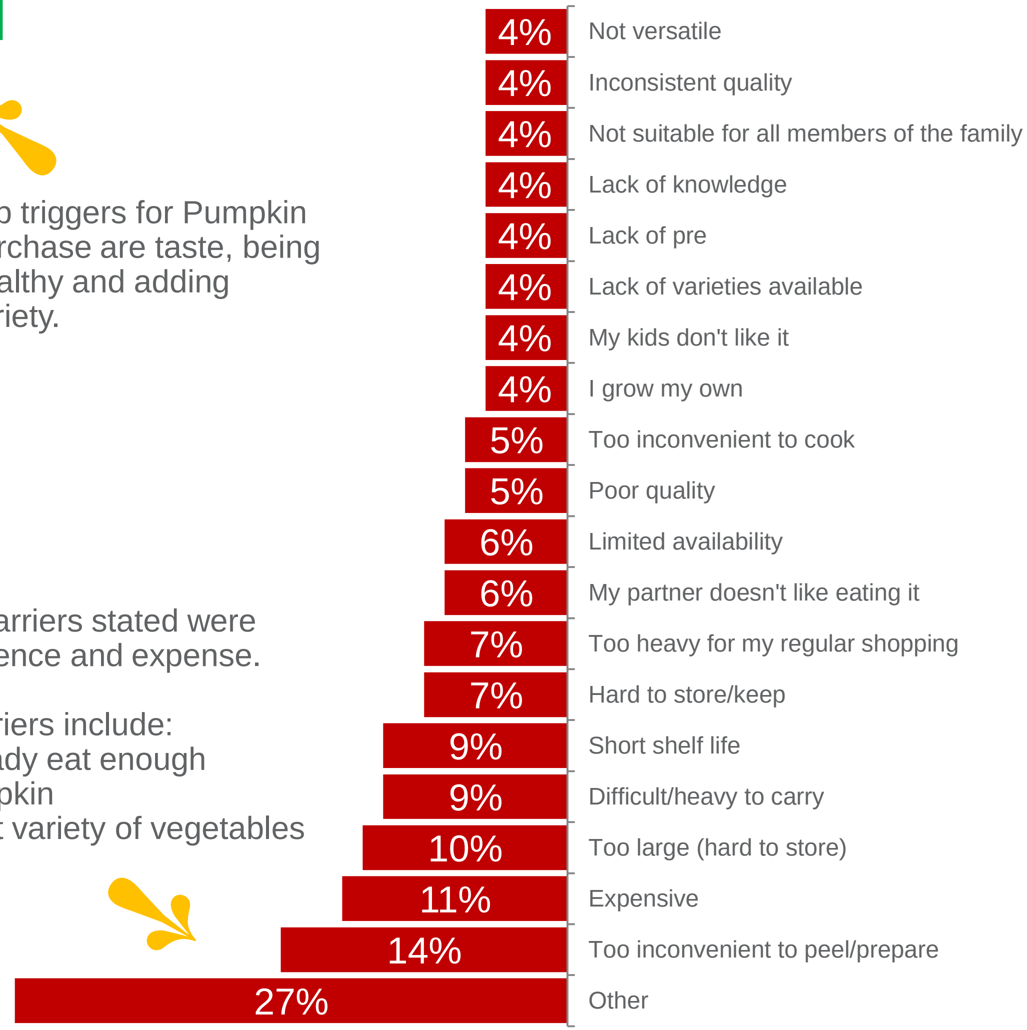
## Pumpkin

### Triggers




Top triggers for Pumpkin purchase are taste, being healthy and adding variety.

### Barriers




The top barriers stated were inconvenience and expense.

Other barriers include:

- Already eat enough Pumpkin
- Want variety of vegetables



N=513

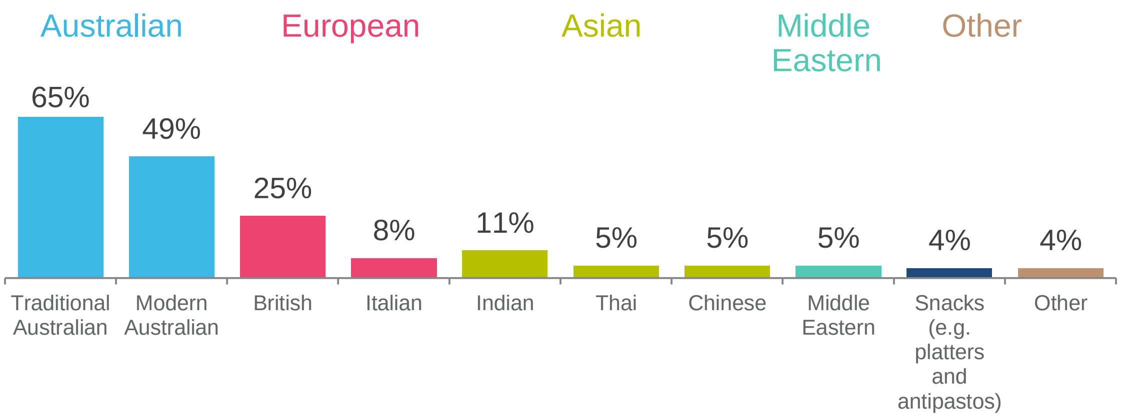
Q7. Which of the following reasons best describes why you purchase pumpkin?

Q8. Which reason best describes why you don't buy pumpkin more often?

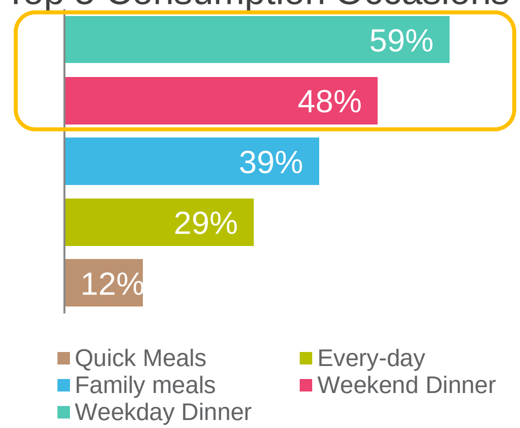
# Cooking Preferences & Occasions: Pumpkin

- Consumers most commonly use pumpkin in Australian cuisine. European and Asian cuisine is also popular.
- Respondents typically roast pumpkin and/or use it in soups.
- Pumpkins are likely to be served with potatoes, carrots and broccoli, though combination with other vegetables is also high.
- The top occasion for consumption of pumpkin is Dinner.

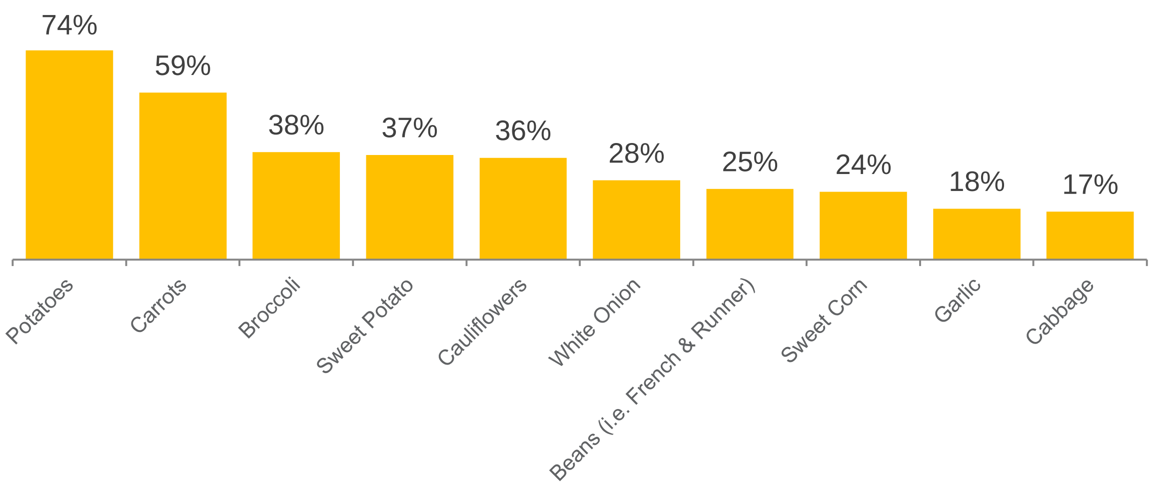
## Typical Cuisine Cooked




## Top 5 Consumption Occasions




## Top 10 Accompanying Vegetables

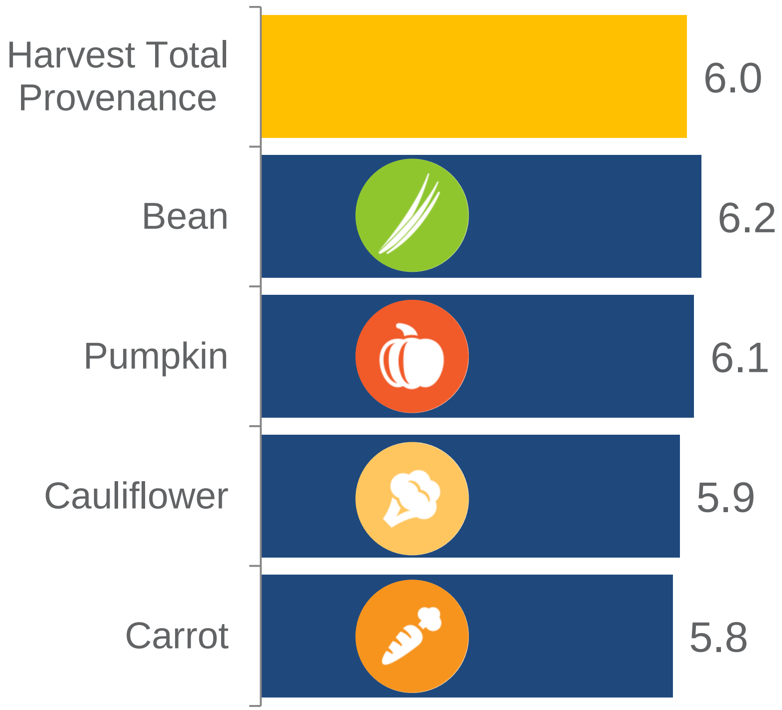



| Top 10 Cooking Styles | |
|---|---|
| Roasting | 65% |
| Soup | 45% |
| Baking | 43% |
| Mashing | 42% |
| Boiling | 40% |
| Steaming | 35% |
| Microwave | 19% |
| Stewing | 14% |
| Puree | 11% |
| Stir frying | 10% |

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

# Importance of Provenance

- Provenance is relatively important for all commodities tracked.



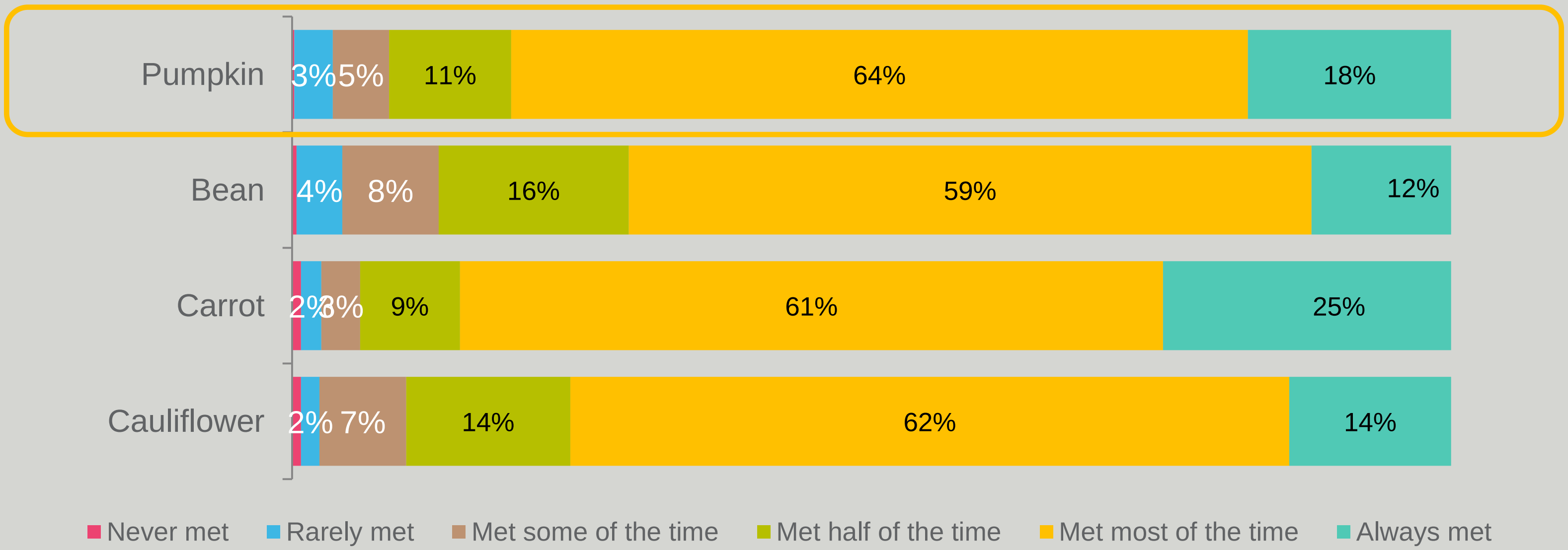

Q14. When purchasing <commodity>, how important is Provenance to you?
Bean N=506
Carrot N=511
Cauliflower N=508
Pumpkin N=513

# Freshness and Longevity: Pumpkin

Expected to stay fresh for **12.1** days

- Respondents indicated that they expected Pumpkin to stay fresh for over 12 days once purchased.
- 18% of respondents stated freshness was always met whilst 64% stated it was met most of the time.
- 19% of respondents stated that pumpkin freshness is met at best only half of the time.

## Expectations Met

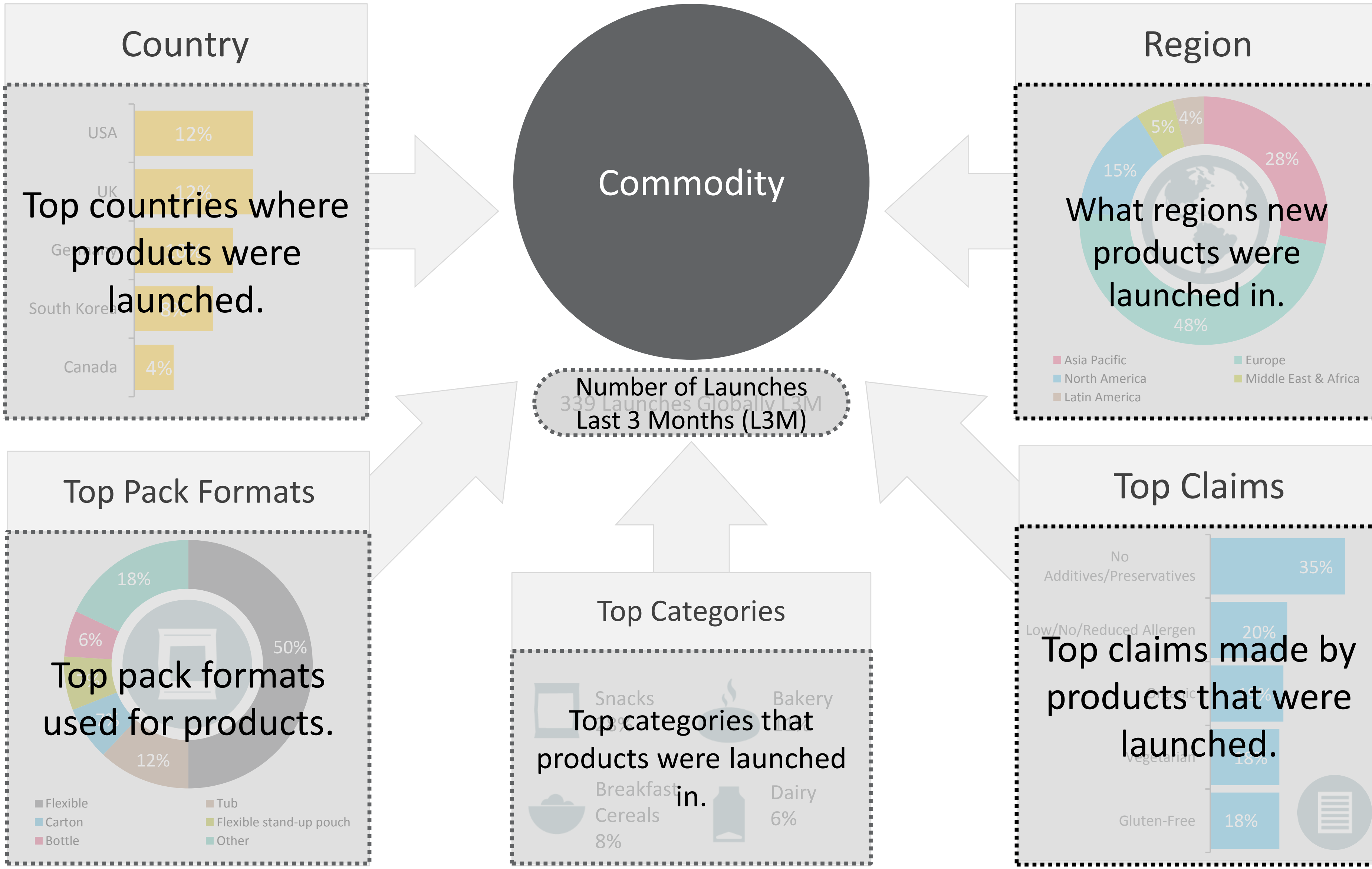



N=513
Q12. How long do you expect pumpkin to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy pumpkin?

# Pumpkin Trends

# New Product Development (NPD) 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.

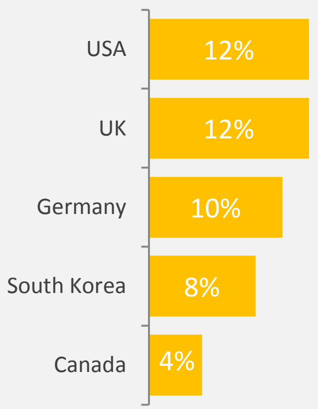


# Pumpkin Global NPDs

## April–June 2013

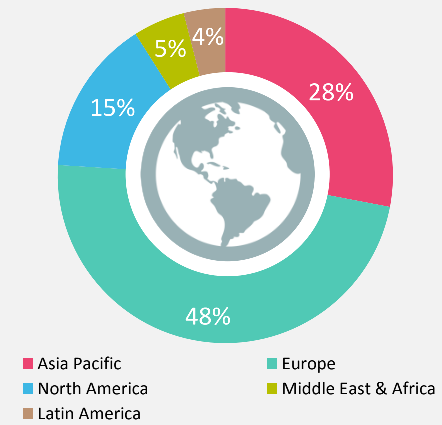
There were 339 new products launched over the last 3 months. The majority of these occurred in Europe and Asia Pacific.
The top categories where products containing pumpkin were launched were snacks, bakery products and breakfast cereals.

### Country

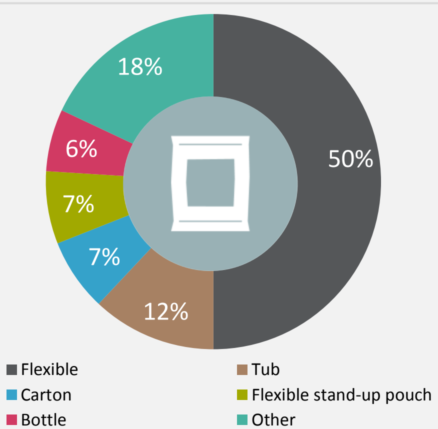



339 Global NPDs

### Region




### Top Pack Formats




### Categories

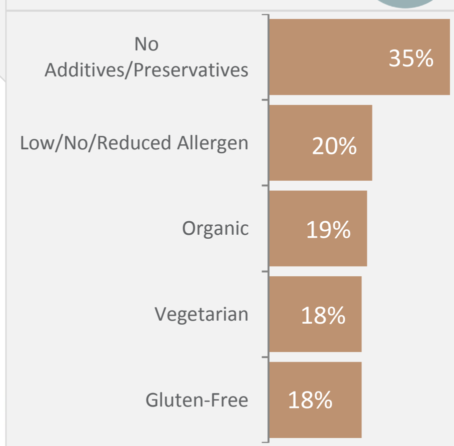
Snacks 28%

Bakery 11%

Breakfast Cereals 8%

Dairy 6%

### Top Claims



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

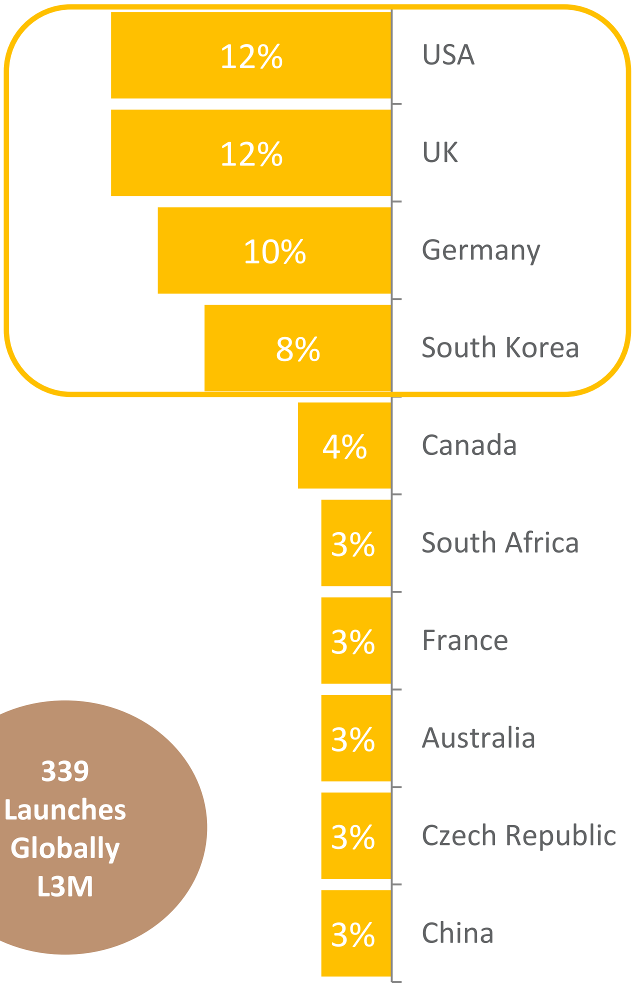
- A total of 339 products containing pumpkin as an ingredient were launched globally in the last 3 months, of which 10 were launched in Australia.
- Europe and the Asia Pacific were the top 2 regions where these products were launched (48% and 28% respectively).
- Flexible packaging was the dominant pack format used for these launches (50%). This is typical of the fresh commodities being tracked.
- Top categories for product launches were snacks (28%), bakery goods (11%) and breakfast cereals (8%).
- Core claims used for launches globally were based around health (e.g. no additives/preservatives 35%, low allergen 20% and organic 19%). This was especially the case for launches in the USA.
- The most innovative launches found were; pumpkinseed energy bars, pumpkin based jams and pumpkin flavoured ice creams (examples of these products can be found at the end of the pumpkin trend report).

Source: Mintel (2013)

# Pumpkin Launches
## Country & Categories

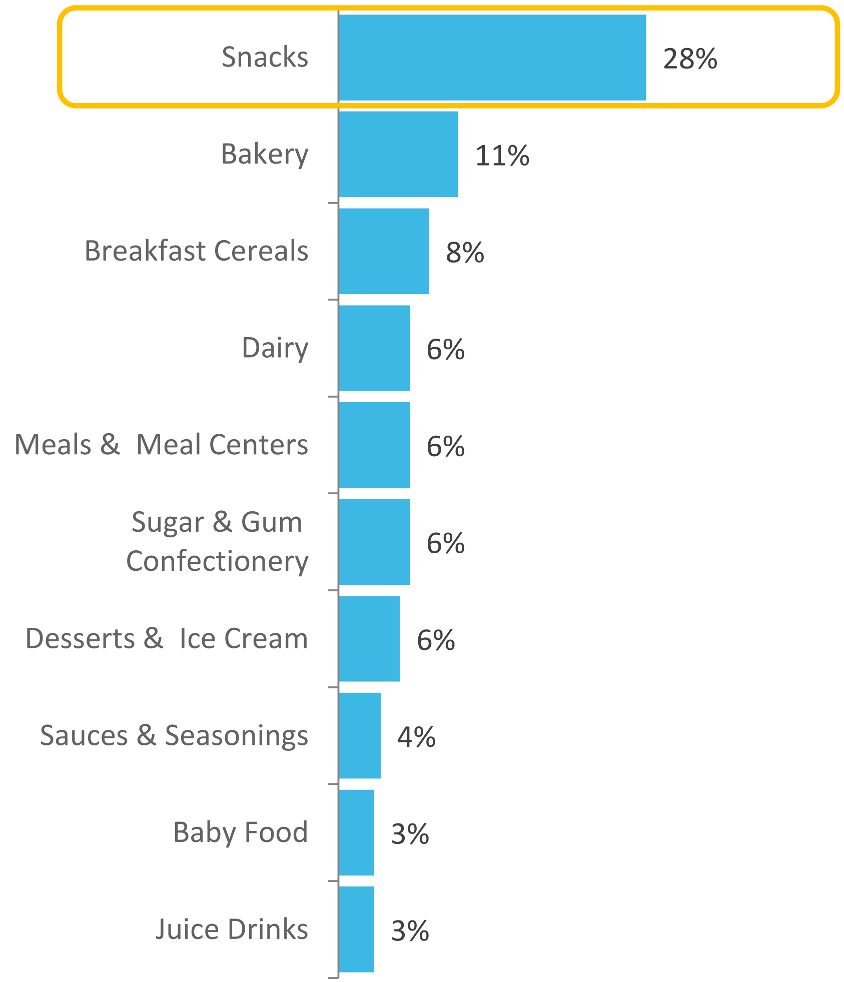
- The most active countries for launches in the last 3 months were the USA, UK, Germany and South Korea.
- Snacks was the dominant category in the last 3 months for launches.

### Top 10 Launch Countries




**339 Launches Globally L3M**

### Top 10 Launch Categories

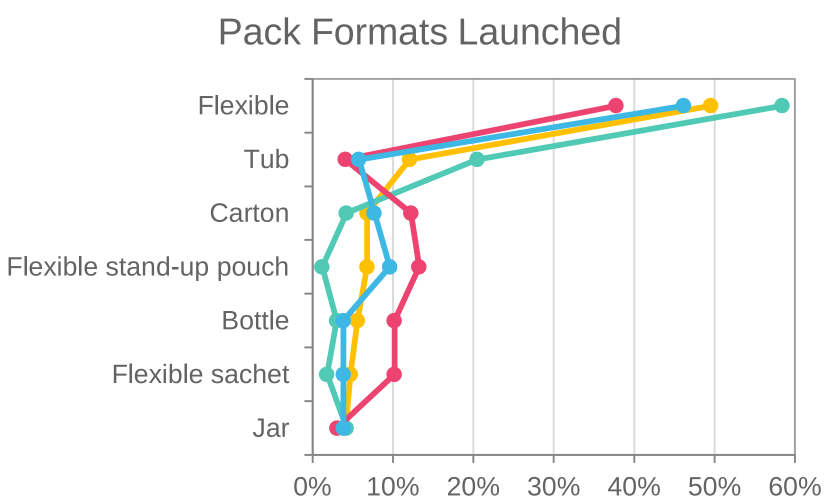


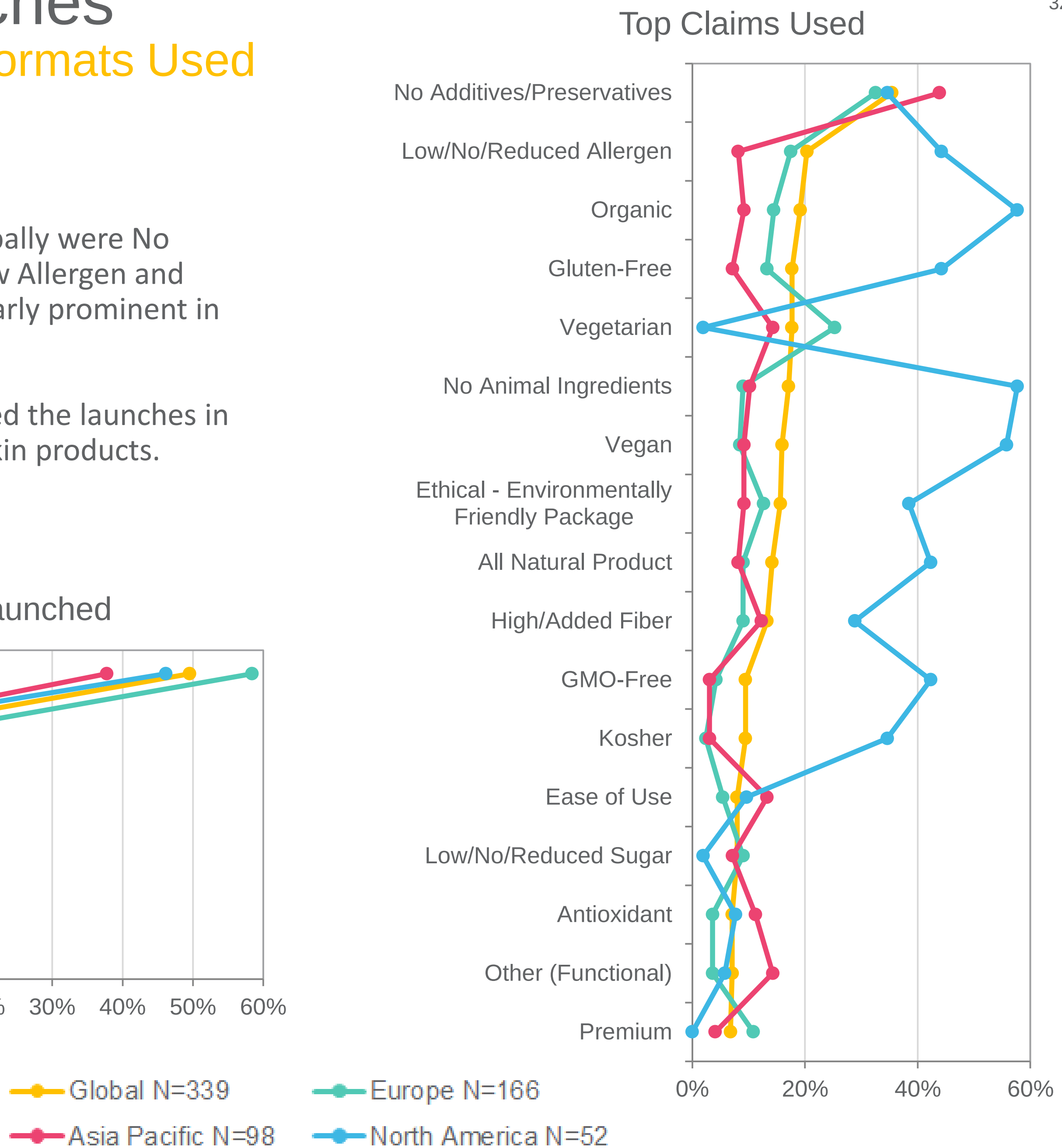

Number of Global Pumpkin NPD for the L3M N=339

# Pumpkin Launches

## Top Claims & Pack Formats Used

- Top Claims for launches globally were No Additives/Preservatives, Low Allergen and Organic, which was particularly prominent in North America.
- Flexible packaging dominated the launches in the last 3 months for pumpkin products.




Number of Global Pumpkin NPD for the L3M N=339
Only regions with n >30 are displayed

# Innovative Pumpkin Launches:
## L3M (April-June 2013)

### 22 Days Enlighted Pumpkinseed Energy Bar (USA)

22 Days Enlighted Pumpkinseed Energy Bar has been repackaged and is now available in a newly designed 1.7-oz. pack. This vegan protein bar is made with raw and organic superfoods and produced with solar energy.


**Claims:**
Brain & Nervous System (Functional), Low/No/Reduced Allergen, Gluten-Free, High Protein, Other (Functional), Kosher, Ethical - Environmentally Friendly Product, Weight & Muscle Gain, Organic

### Tasty View Sweet Pumpkin Chips (South Korea)

Tasty View Sweet Pumpkin Chips are described as a non-fried crispy snack. The product is made with pesticide-free sweet pumpkin, using a vacuum-freeze drying method to preserve the original flavour of pumpkin. It retails in a 40g pack.


**Claims:**
Ethical - Environmentally Friendly Product

### Peter Lamas Naturals Exfoliating Pumpkin Facial Scrub (USA)

The Peter Lamas Naturals range is claimed to be innovatively formulated according to natural science principles. According to the manufacturer, the products are formulated with organic plant extracts and botanicals with advanced skincare technology to help repair and replenish skin, giving users youthful and radiant glow.


**Claims:**
Vitamin/Mineral Fortified, Paraben Free, Brightening / Illuminating*, Botanical/Herbal, Exfoliating, Cleansing*, Ethical - Environmentally Friendly Product, Ethical - Organic

### Barteroder Land Art Pumpkin Pear Chutney (Germany)

Barteroder Land Art Kürbis-Birnen Chutney (Pumpkin Pear Chutney) is now available. This ready to use sauce is made with pumpkin-pears and candied ginger cubes. This premium product is ideal with grilled meats, fish and cold roasts or cheeses. It is made with only natural ingredients, without artificial additives and retails in a 250ml jar.


**Claims:**
Ease of Use, No Additives/Preservatives, All Natural Product, Premium

Source: Mintel (2013)

# Innovative Pumpkin Launches:
## L3M (April-June 2013)

### Yoji High Tea Cookies (Malaysia)

Yoji High Tea Cookies are wholemeal cookies made with organic pumpkin kernel, which are said to be not only tasty but healthy too. They are oven baked, made from all natural ingredients and sweetened with organic molasses.


**Claims:**
No Additives/Preservatives, All Natural Product, High/Added Fibre, Ethical - Environmentally Friendly Package, Halal, Organic, Low/No/Reduced Transfat, Vegetarian, Wholegrain

### Lotte Kidstree Carrot & Pumpkin Chocolates (South Korea)

Lotte Kidstree Carrot & Pumpkin Chocolates have been repackaged in a newly designed pack. The nutritious snack covered with chocolate is specially designed for growing children. It contains less sugar and cacao than the manufacturer's ABC chocolate.


**Claims:**
No Additives/Preservatives, Children (5-12), Low/No/Reduced Sugar

### Aquilea Prostate Dietary Supplement for Prostate (Venezuela)

Aquilea Prostate Complemento Alimenticio (Dietary Supplement for Prostate) is formulated with concentrated pumpkin seed oil and antioxidants lycopene and resveratrol, which help slow down cell aging, and are said to be traditionally used for man's well being. This product retails in a 26.5g pack containing 30 capsules.


**Claims:**
Botanical/Herbal, Anti-Ageing, Male, Antioxidant

### Windau Classic Pumpkin Seed Salami (Germany)

Windau Classic Kürbiskern-Salami (Pumpkin Seeds Salami) is a top quality product. It retails in a 250g pack.


**Claims:**
N/A

Source: Mintel (2013)

# Innovative Pumpkin Launches:
## L3M (April-June 2013)



### Green Heart Organic Spelt and Pumpkin Seed Spread (Finland)

Green Heart Luomu Speltti Kurpitsansiemenlevite (Organic Spelt and Pumpkin Seed Spread) is suitable for vegans. This product retails in a 150g pack.


**Claims:**
Organic, Vegan, No Animal Ingredients

### Vilkyskiu Natural Yogurt with Quince, Pumpkin and Cereal (Poland)

Vilkyskiu Natural Yogurt with Quince, Pumpkin and Cereals is now available. This product retails in a 200g pack which bears a QR code.


**Claims:**
N/A

### Lu Gang / Lugang Pumpkin and Five-Grain Glutinous Rice (China)

Lu Gang / Lugang Nan Gua Wu Gu Xiang Tang Yuan (Pumpkin and Five-Grain Glutinous Rice Balls) are free from colourings and flavourings. Each rice ball is filled with five types of grains and wrapped with a pastry made using natural pumpkin and glutinous rice powder.

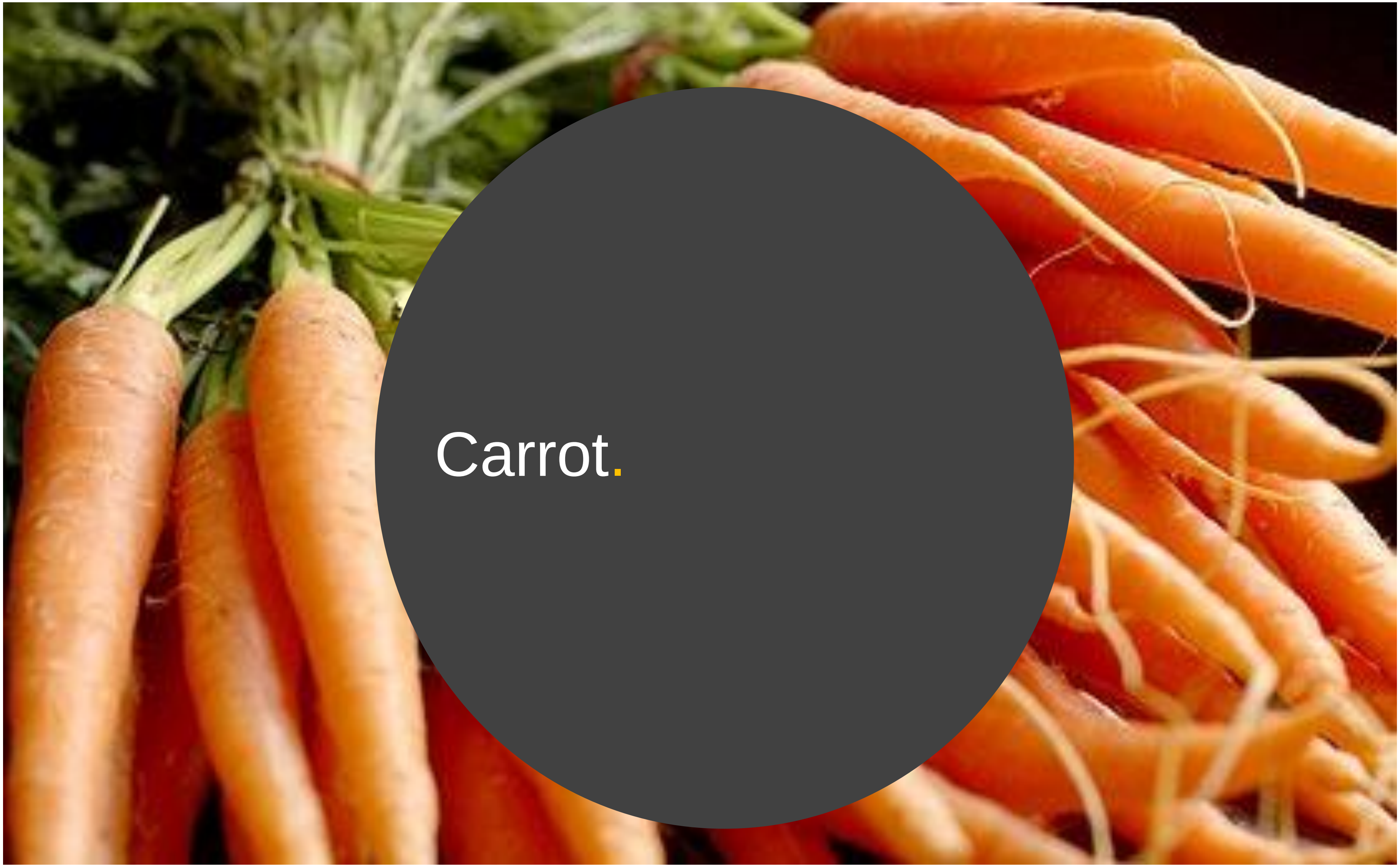

**Claims:**
No Additives/Preservatives, Low/No/Reduced Fat

### Casa Lucena Classic Pumpkin Jam with Almonds (Portugal)

Casa Lucena Classic Doce de Abóbora com Amédoa (Classic Pumpkin Jam with Almonds) is made with carefully selected fruit in a perfect state of maturity. All ingredients are exclusively natural without any addition of artificial colours or preservatives.


**Claims:**
No Additives/Preservatives, Ethical - Environmentally Friendly Product

Source: Mintel (2013)


Carrot.

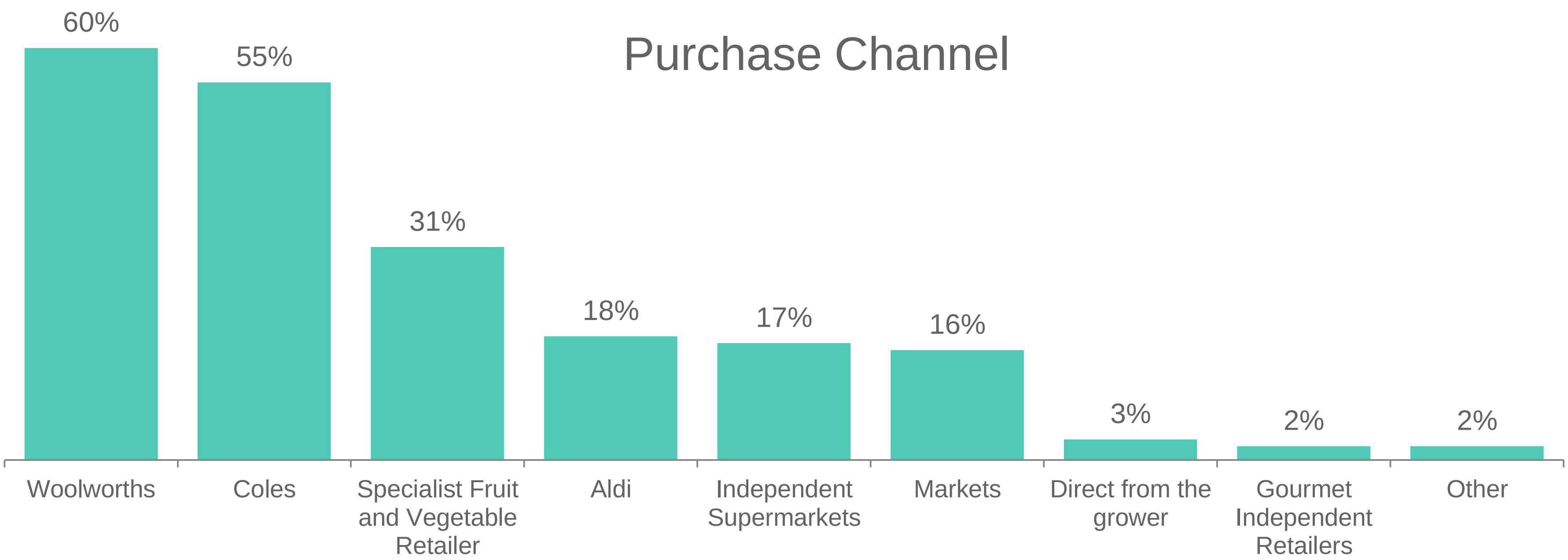
# Purchase and Consumption Behaviour

## Carrots

Average Purchase **4.0** times per month

Average Consumption **13.8** times per month

- Carrots are most commonly purchased through mainstream retail channels (Coles and Woolworths).
- Specialist vegetable retailers were also a popular purchase location.
- On average respondents purchased carrot 4 times a month and consumed  them 13.8 times a month.




Q1. On average, how often do you purchase carrot?
Q2. On average, how often do you consume carrot?
Q5. From which of the following channels do you typically purchase carrot?
Sample N=511

colmar brunton.

# Average Spend & Price Sensitivity

## Carrots

⇛ The average consumer typically purchased **1.2kg** of Carrot.

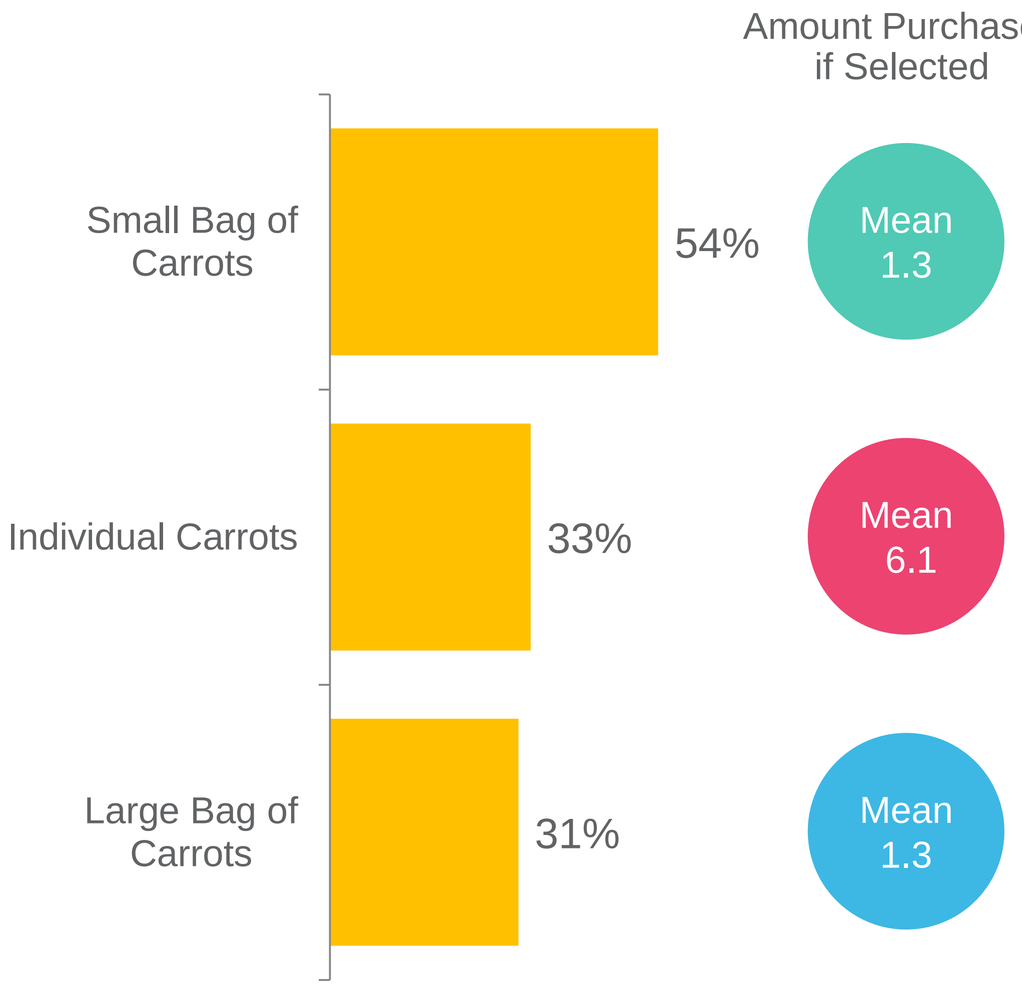

⇛ The average recalled last spend on Carrots was **$3.40**


⇛ Consumers perceived the average price for Carrots as very good value for money **(7.8/10).**

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

# Pack Formats Purchased

## Carrots

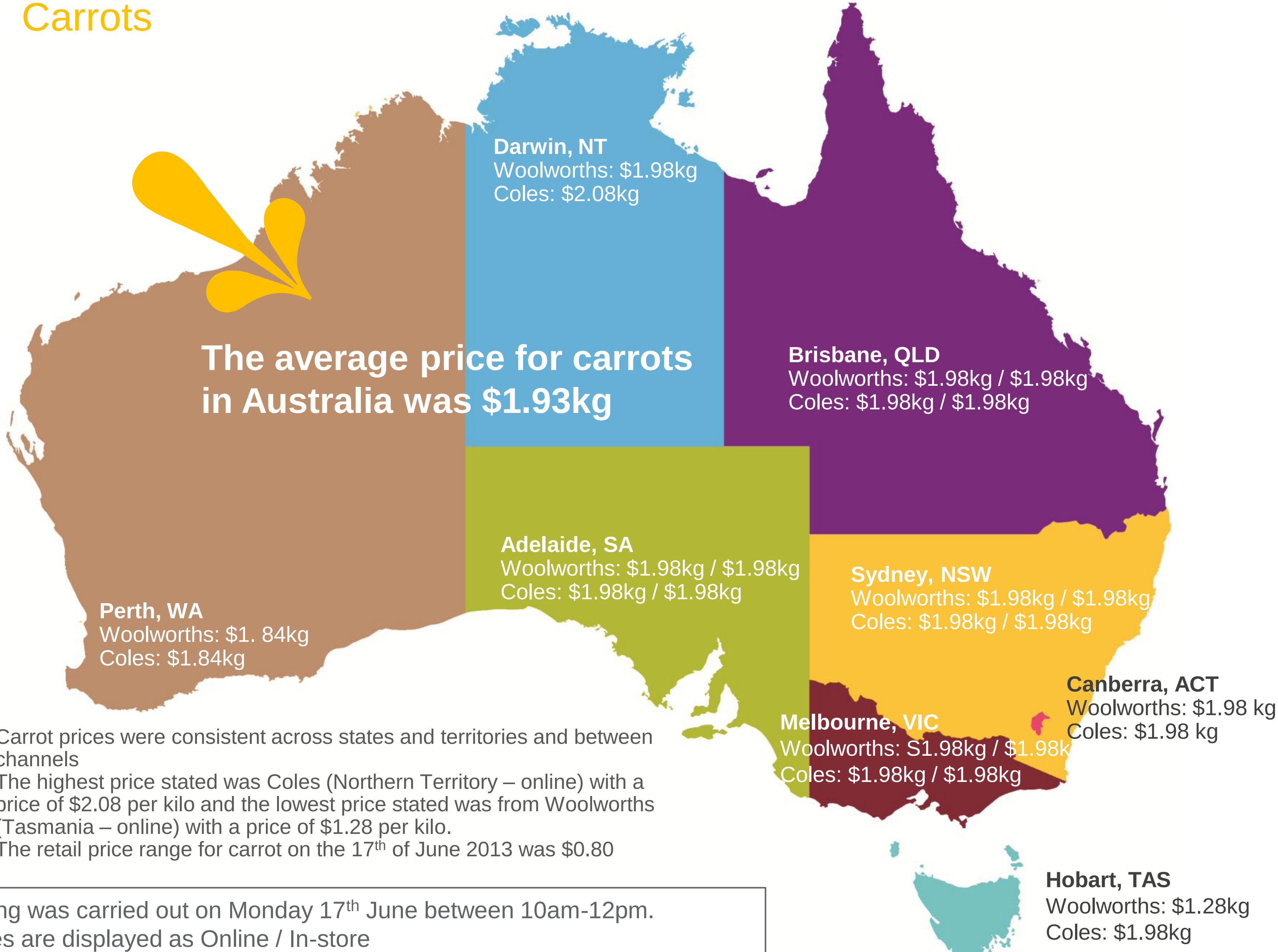



- Small bags of carrots was the most common pack format purchased for carrots (54%). Typically only 1 bag is purchased of this format, this amount is the same for large bags of carrots.
- 33% of respondents purchased carrots individually (loose format). On average 6 carrots are purchased when individually selected.

Q3a. How much carrot does this typically equate to?

# Online and In-store Commodity Prices

## Carrots




- Carrot prices were consistent across states and territories and between channels
- The highest price stated was Coles (Northern Territory – online) with a price of $2.08 per kilo and the lowest price stated was from Woolworths (Tasmania – online) with a price of $1.28 per kilo.
- The retail price range for carrot on the 17th of June 2013 was $0.80

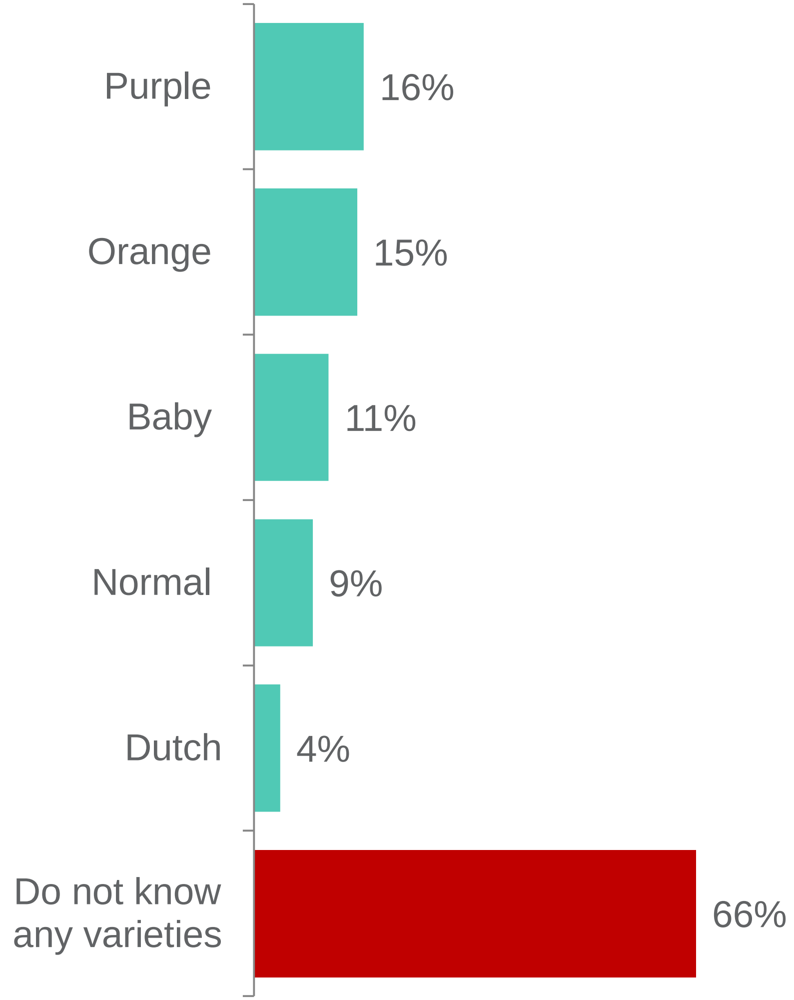
Pricing was carried out on Monday 17th June between 10am-12pm.
Prices are displayed as Online / In-store

# Spontaneous Varietal Awareness & Purchase



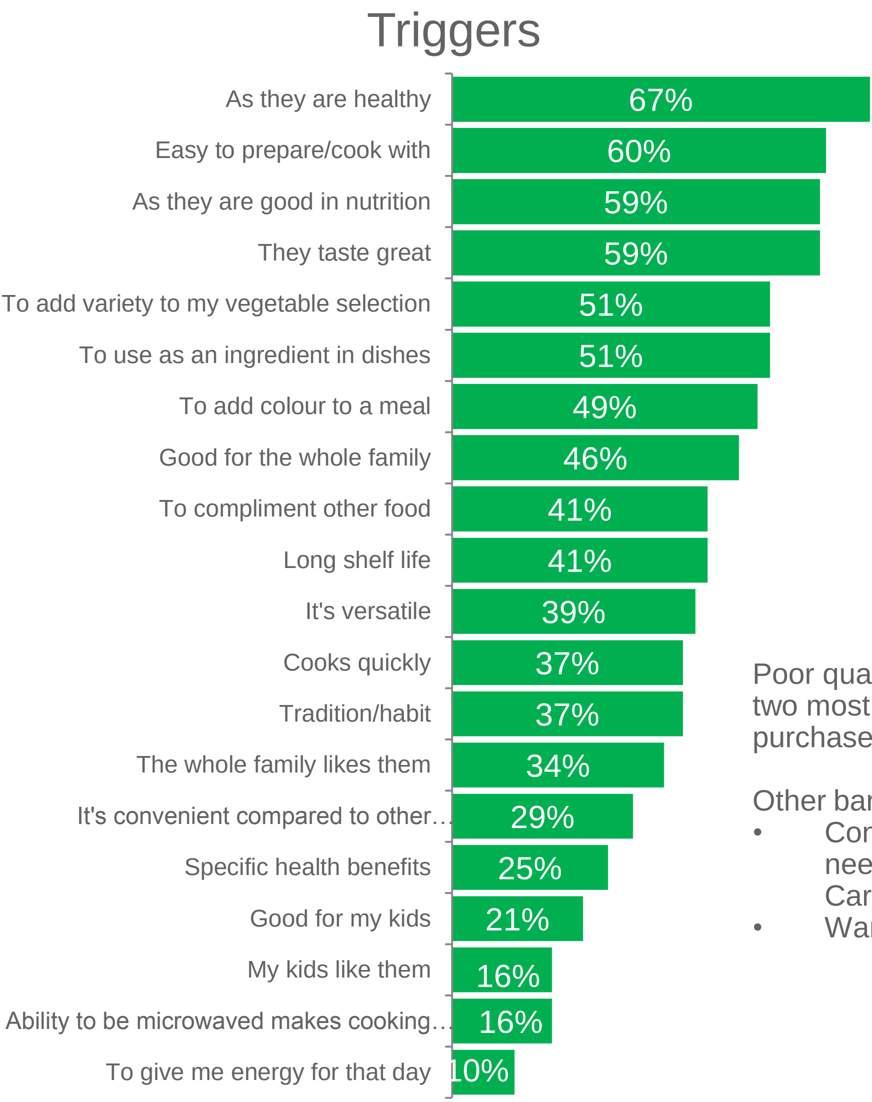
## Carrots

- 66% of respondents that have purchased carrots in the last month could not recall a variety.
- The highest recall for carrot varieties was purple (16%) and orange (15%).
- Overall consumers are not familiar with the variety names of carrot and instead associate the different types of carrot based on their size and colour.




N=511
Q6a. What varieties of carrot are you aware of? (unprompted)

# Triggers & Barriers to Purchase
## Carrots

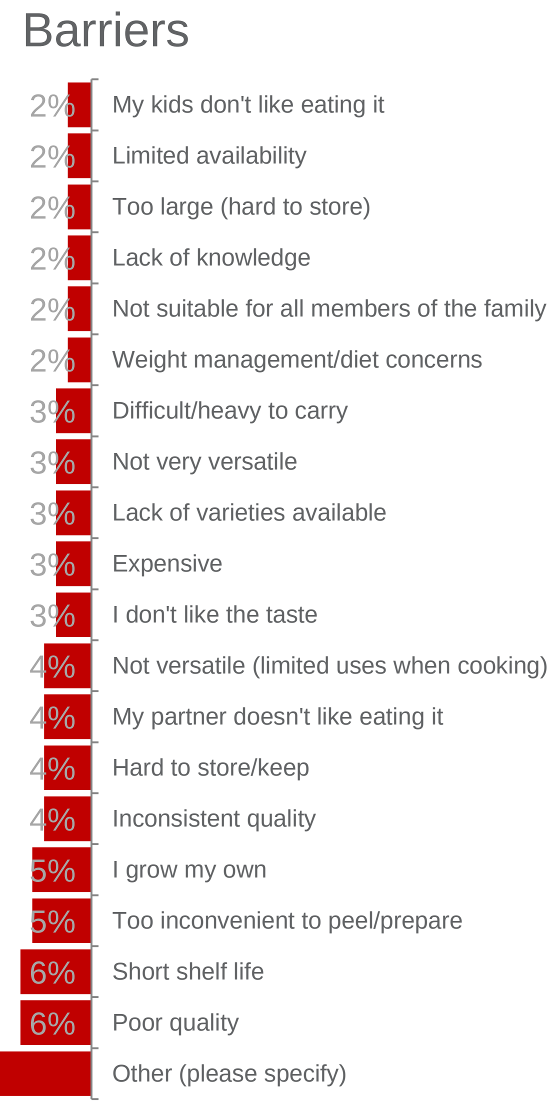



The top triggers to carrot purchases are being healthy/nutritious, easy to cook/prepare and tasting great.

Poor quality and short shelf life were the two most stated barriers to greater carrot purchase.

Other barriers stated were:

- Consumers only purchase what they need and believe they buy enough Carrots
- Want variety in their diets

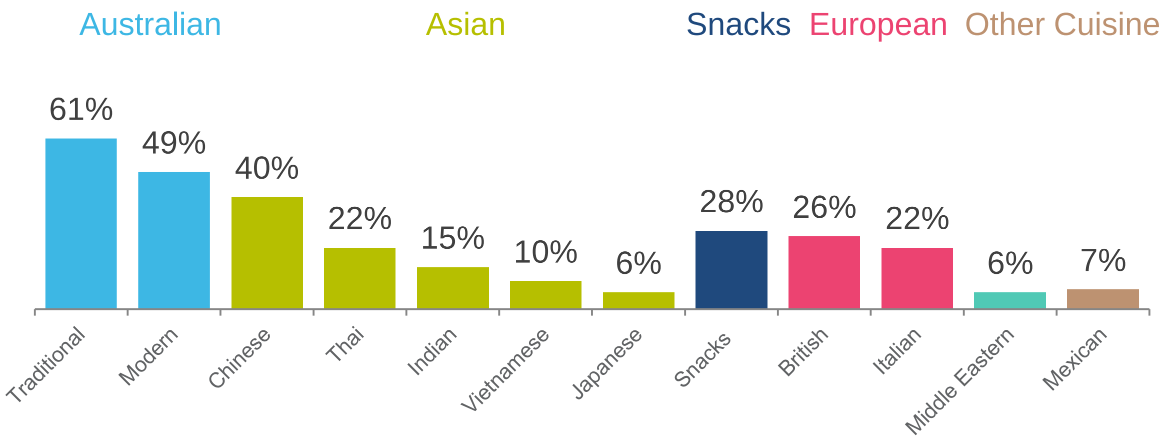



N=511
Q7. Which of the following reasons best describes why you purchase carrot?
Q8. Which reason best describes why you don't buy carrot more often?

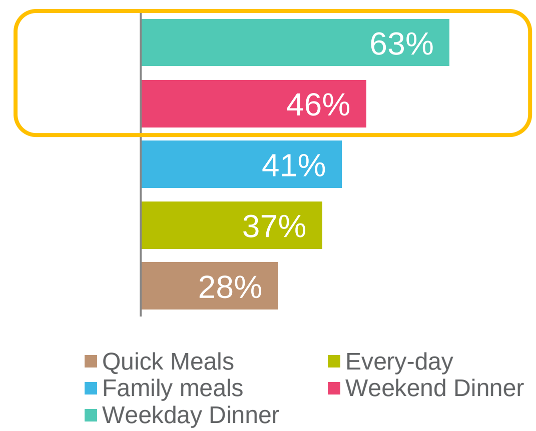
# Cooking Preferences & Occasions: Carrot

- Carrots are most commonly used in Australian cuisine. Use in Asian, and European cuisine and for snacks was also popular.
- Carrots are very versatile in the ways they can be cooked. The top 3 ways they are cooked are steamed, boiled and roasted.
- Carrots are accompanied with many different types of vegetables. The most common vegetables being potatoes, green peas and broccoli.
- Top occasion for consumption of carrots was dinners.

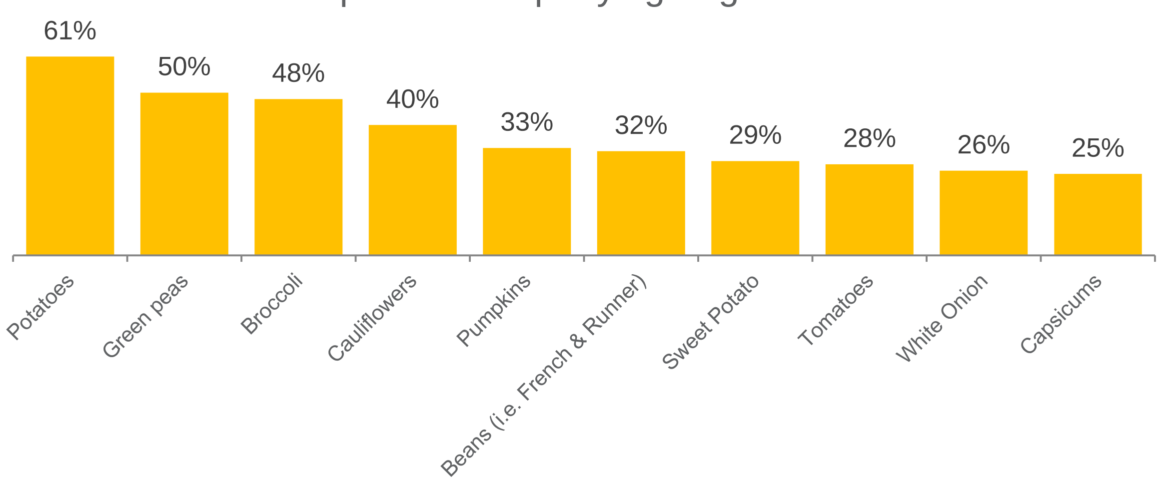
## Typical Cuisine Cooked




## Top 5 Consumption Occasions




## Top 10 Accompanying Vegetables

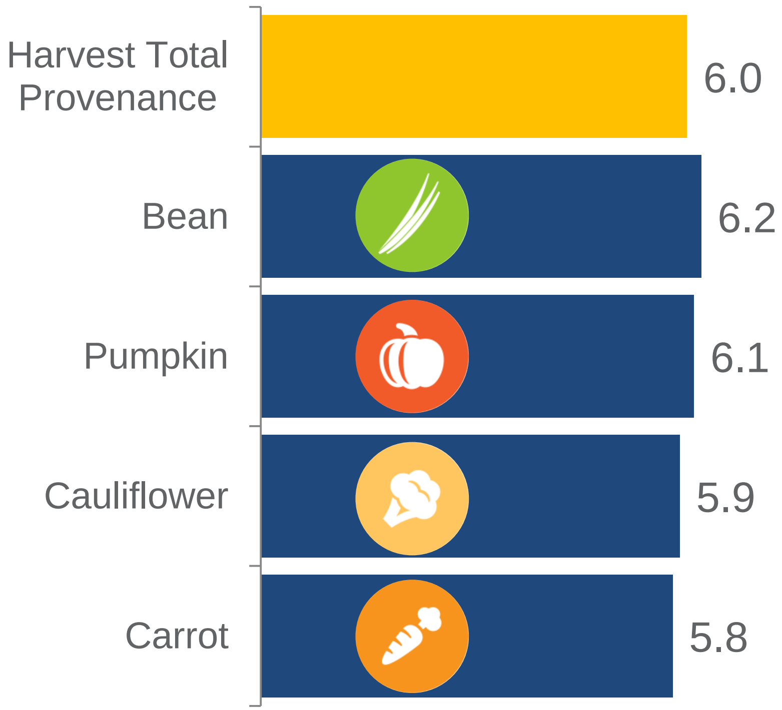



| Top 10 Cooking Styles | |
|---|---|
| Steaming | 50% |
| Boiling | 46% |
| Roasting | 45% |
| Stir frying | 44% |
| Raw | 41% |
| Soup | 32% |
| Baking | 28% |
| Stewing | 27% |
| Microwave | 23% |
| Mashing | 7% |

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

# Importance of Provenance

⇛ Provenance is relatively important for all commodities tracked.




AUSTRALIAN MADE®

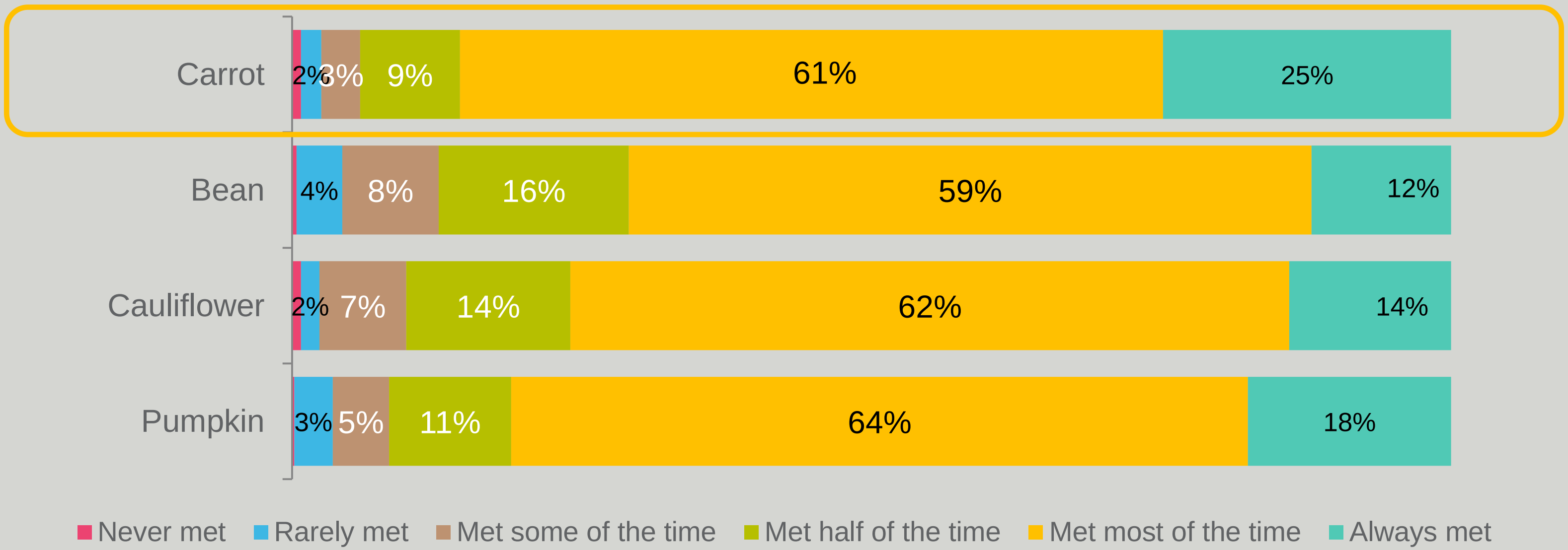
Q14. When purchasing <commodity>, how important is Provenance to you?
Bean N=506
Carrot N=511
Cauliflower N=508
Pumpkin N=513

# Freshness and Longevity: Carrots

Expected to stay fresh for **12.3** days

- Respondents indicated that they expected Carrots to stay fresh for over 12 days once purchased.
- 25% of respondents stated freshness was always met whilst 61% stated it was met most of the time.
- 15% of respondents stated that carrot freshness is met at best only half of the time.

## Expectations Met



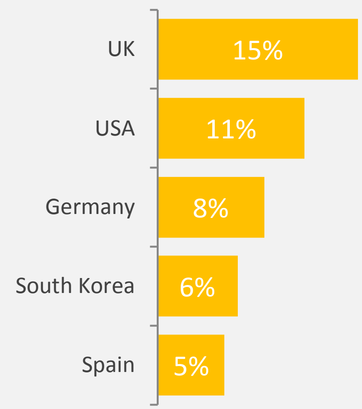

N=513
Q12. How long do you expect carrots to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy carrots?

# Carrot Trends

# Carrot Global NPDs
## April–June 2013

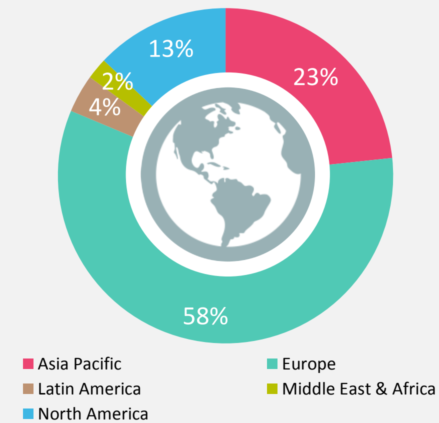
There were 1253 new products launched over the last 3 months that contained carrots as an ingredient.
The majority of these launches occurred in Europe and the Asia Pacific regions.
The top categories launches occurred in meals, juice drinks and dairy.

### Country

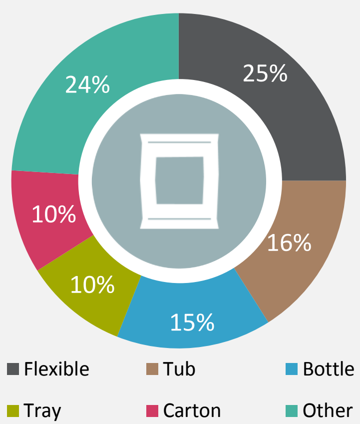



1253 Global NPDs

### Region




### Top Pack Formats




### Categories

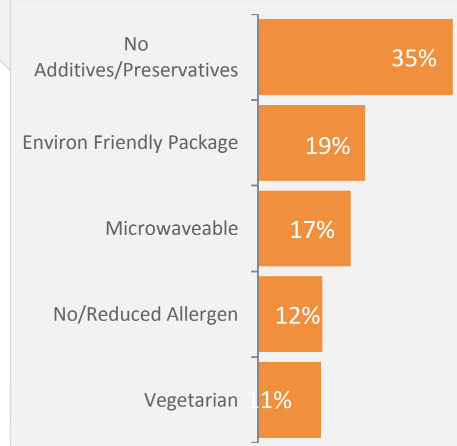
Meals 20%

Juice Drinks 11%

Dairy 8%

Soup 7%

### Top Claims



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

- A total of 1253 products were launched globally in the last 3 months containing carrot as an ingredient, 25 of which were launched in Australia.
- Europe and the Asia Pacific were the 2 top regions where these products were launched (58% and 23% respectively).
- Flexible and tub packaging were the top 2 pack formats used for the products launched (25% and 16% of launches respectively).
- The top categories for product launches were meals (20%), juice drinks (11%), dairy (8%) and soups (7%).
- The top claims used for launches globally were no additives/preservatives (35%), environmentally friendly packaging (19%) and being microwaveable (17%). Health claims and other convenience claims were also common across all regions for carrot product launches.
- The most innovative launches found were; carrot curry flavoured tea, carrot based moisturiser/sunscreen and carrot jam (examples of these products can be found at the end of the carrot trend report).

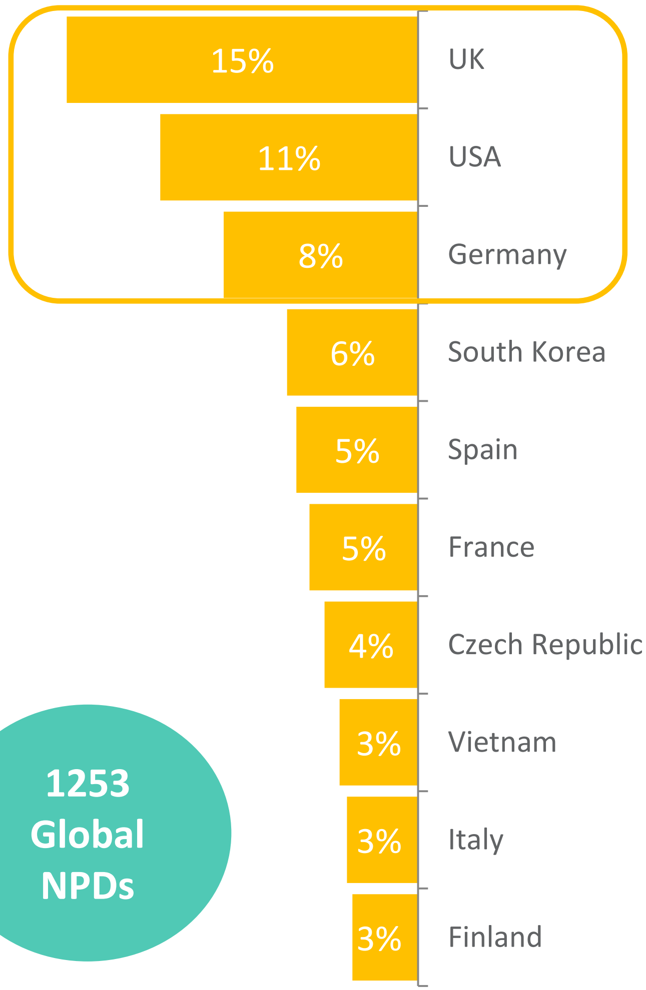
Source: Mintel (2013)

# Carrot SKUs

## Country, Region & Categories

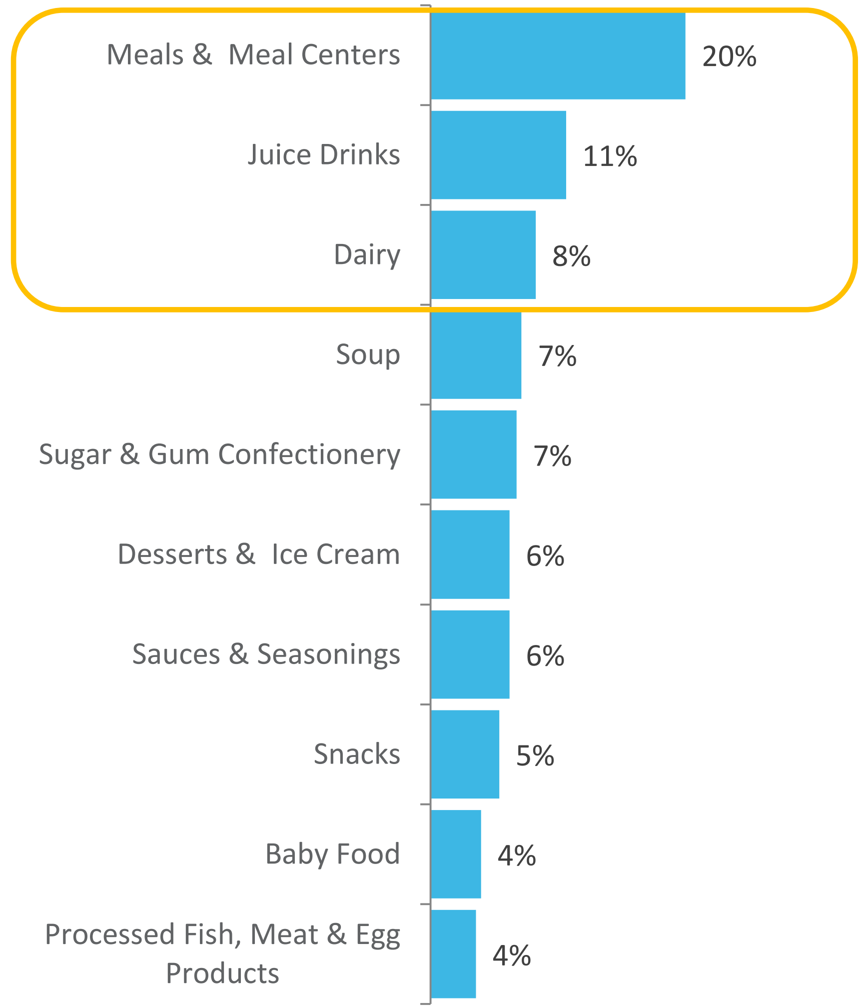
- The most active countries for launches in the last 3 months were the UK, USA & Germany.
- The main categories for launches were meals, juice drinks and dairy products.

### Top 10 Launch Countries




**1253 Global NPDs**

### Top 10 Launch Categories

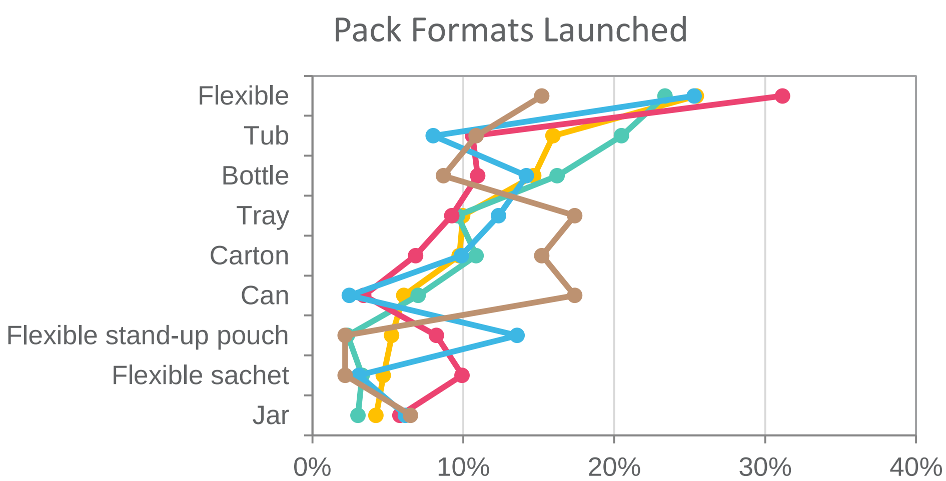


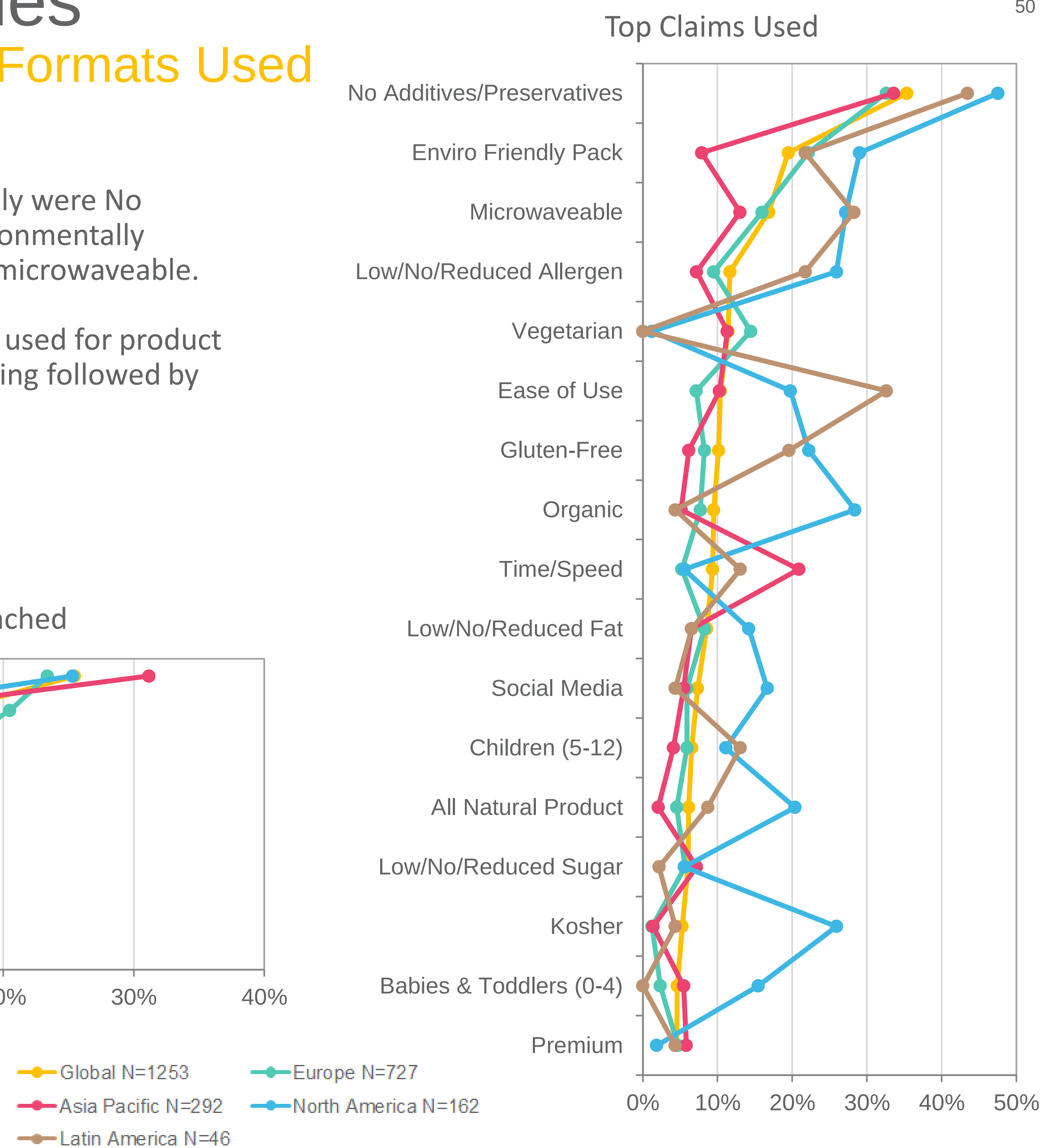

Number of Global Carrot NPD for the L3M N=1253

# Carrot Launches

## Top Claims & Pack Formats Used

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




Number of Global Carrot NPD for the L3M N=1253

# Innovative Carrot Launches:
## L3M (April-June 2013)

### Conradl Mon Café Carrot & Walnut Fudge Cake (Portugal)

Conradl Mon Café Bolo de Cenoura (Carrot & Walnut Fudge Cake) is cake with 15% fondant coating, raisin and walnut as well as 2% decorations. This product retails in a 400g pack. Also available are the following varieties: Chocolate; and Lemon.


**Claims:**
N/A

### Heinz Smooth Butternut Squash, Carrot & Apple (UK)

Heinz Smooth Butternut Squash, Carrot & Apple is easy to prepare and suitable for babies from four months of age. It is enriched with iron, low in salt and free of artificial colours, flavours, preservatives and added eggs. The product is suitable for vegetarians and retails in a 130g pack.


**Claims:**
No Additives/Preservatives, Vitamin/Mineral Fortified, Low/No/Reduced Allergen, Ease of Use, Gluten-Free, Low/No/Reduced Sodium, Vegetarian, Babies & Toddlers (0-4)

### Beyond Meat Lightly Seasoned Chicken-Free Strips (USA)

Beyond Meat Lightly Seasoned Chicken-Free Strips are made with plant-based protein from soybeans and peas that looks, feels, tastes and acts like chicken. The product is free from gluten, GMO, dairy, ABX and hormones.


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

### Numi Organics Savory Tea Carrot Curry Flavoured Tea Infusions (USA)

Numi Organics Savory Tea Carrot Curry Flavoured Tea Infusion is said to provide a wholesome new tea experience and is made with a blend of decaffeinated green tea, curry, turmeric, ginger, sweet carrots and cilantro.


**Claims:**
GMO-Free, Caffeine Free, Ethical - Environmentally Friendly Package, Kosher, Ethical - Environmentally Friendly Product, Halal, Organic, Social Media, Carbon Neutral

Source: Mintel (2013)

# Innovative Carrot Launches:
## L3M (April-June 2013)

### Barilla Veggie Farfalle Pasta (Mexico)

Barilla Veggie Pasta de Sémola de Trigo Duro con Puré de Zanahoria y Calabaza (Farfalle Pasta) is made with freshly pureed carrots and squash. A portion provides 20% of the daily recommended amount of vegetables. It retails in a 340g recyclable pack.


**Claims:**
Kosher

### Happytimes Crazy Crunchies Freeze-Dried Carrot Apple Bites (USA)

Happytimes Crazy Crunchies Crazy Crunchies Freeze-Dried Carrot Apple Bits are made with fruit and vegetables and said to be a crunchy and delicious snack. They contain easy to eat veggies, are 100% natural, free of artificial ingredients, preservatives, trans fats.


**Claims:**
No Additives/Preservatives, Vitamin/Mineral Fortified, Low/No/Reduced Allergen, Ease of Use, Gluten-Free, Low/No/Reduced Sodium, Vegetarian, Babies & Children

### Tasty View Carrot Chips (South Korea)

Tasty View Carrot Chips are now available. The product is made with pesticide-free garlic using a vacuum-freeze drying method to preserve the original flavour, and retails in a 30g pack..


**Claims:**
Ethical - Environmentally Friendly Product

### Tastee Amla Carrot Jam (India)

Tastee Amla Carrot Jam is 100% natural and free from artificial colours, chemical preservatives, and artificial essences. This jam is suitable for vegetarians and retails in a 250g pack.


**Claims:**
No Additives/Preservatives, All Natural Product, Vegetarian

Source: Mintel (2013)

# Innovative Carrot Launches:
## L3M (April-June 2013)

### Happy Munchies Organic Superfoods Carrot Rice Cakes (Australia)

Happy Munchies Organic Superfoods Carrot Rice Cakes are suitable for babies and toddlers of 7+ months. These whole grain brown rice cakes are lightly sweetened with fruit juice and vegetable juice, free from gluten, artificial colours, flavours and preservatives.


**Claims:**
No Additives/Preservatives, Low/No/Reduced Allergen, Organic, Ethical - Environmentally Friendly Product, Ease of Use, Gluten-Free, Social Media, Babies & Toddlers (0-4), Wholegrain

### Aplus Carrot and Raisin Bread (Thailand)

Aplus Carrot and Raisin Bread is now available. The product retails in a 90g pack and is exclusively sold at 7 Eleven.

**Claims:**
N/A

### GT Carrot Lotion (Philippines)

GT Carrot Lotion features a 4in1 anti-ageing formula that is claimed to offer whitening, moisturising, body concealer and sunblock with SPF 60. It contains beta carotene from pure carrot extract, which is said to reduce signs of ageing, promoting healthy, white and smooth even-toned, young looking skin.

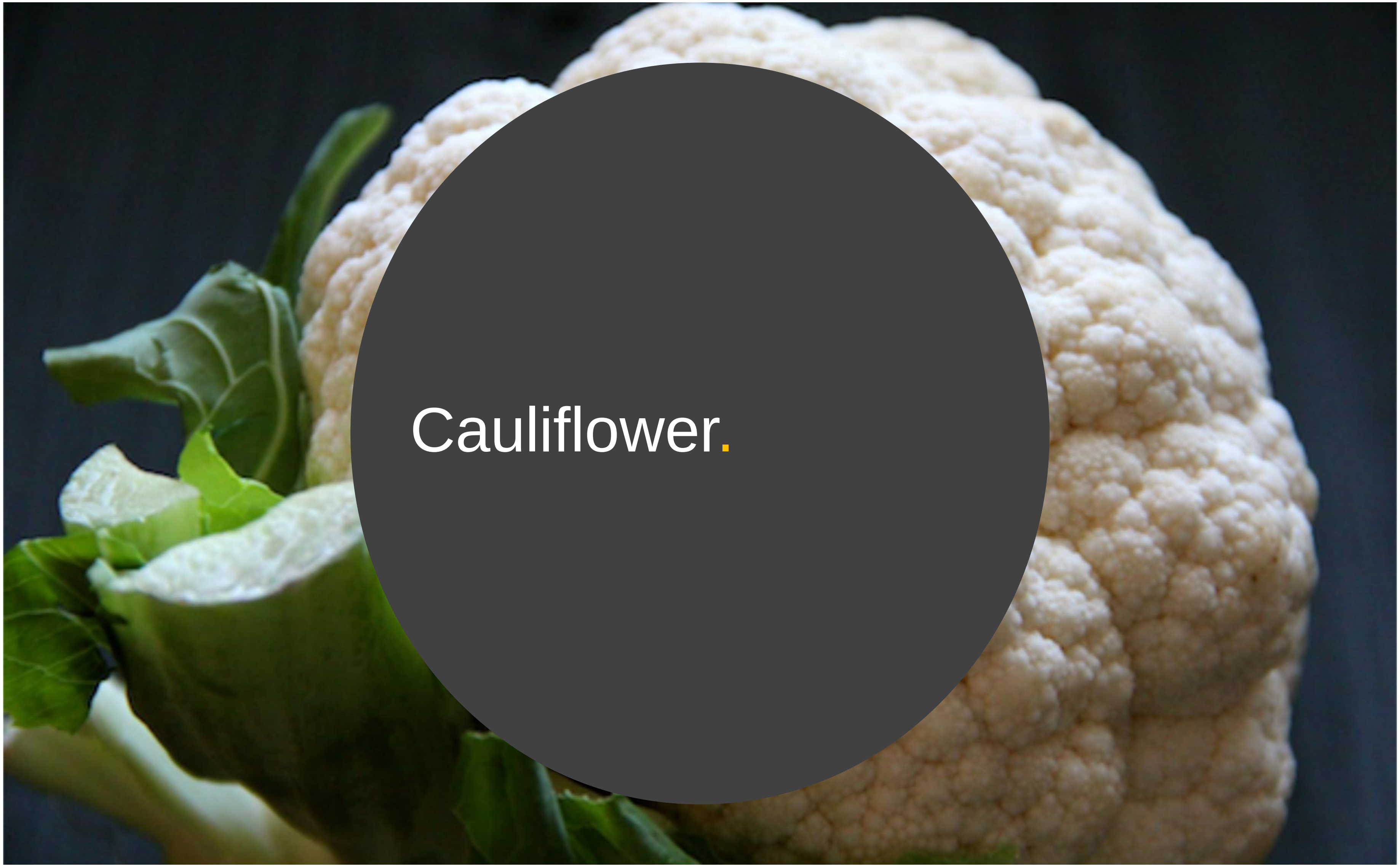

**Claims:**
Botanical/Herbal, Anti-Ageing, UV Protection, Whitening, Moisturising / Hydrating

### Value Plus Preserved Carrot Snack (Indonesia)

Value Plus Manisan Wortel (Preserved Carrot Snack) is now available. The economy product is said to be made from 100% real vegetable, and retails in a 200g pack.


**Claims:**
Economy

Source: Mintel (2013)


Cauliflower.

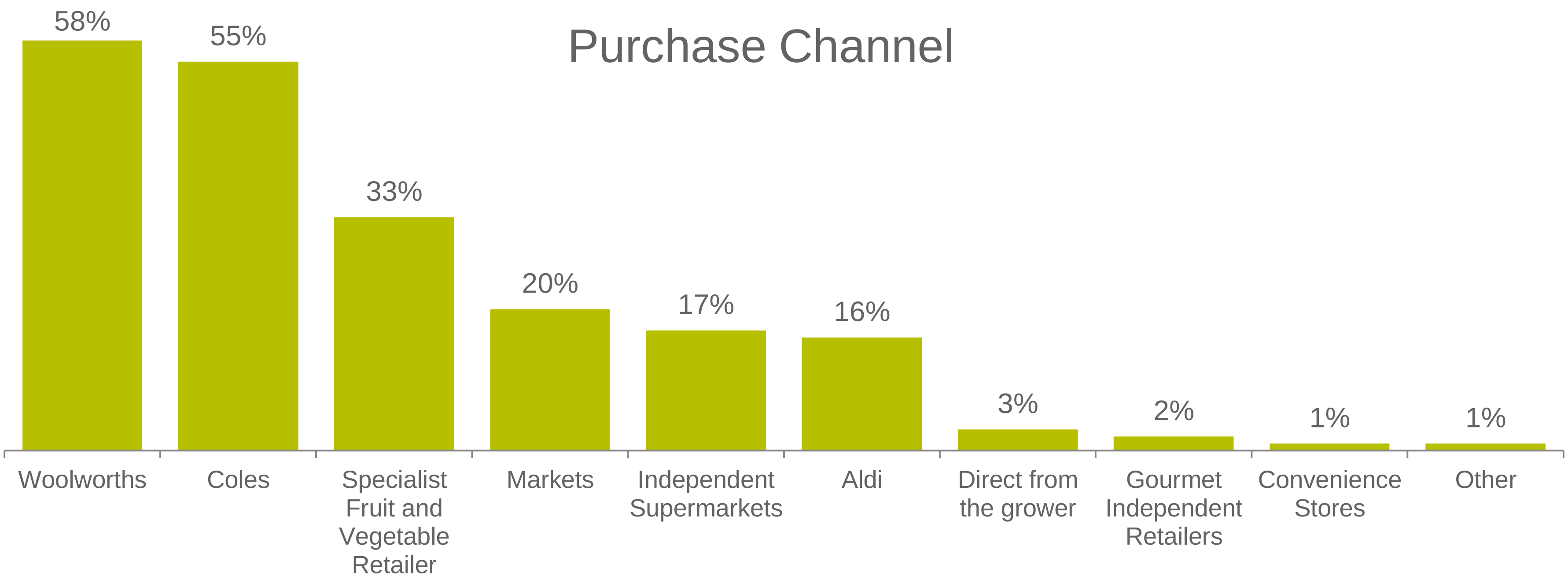
# Purchase and Consumption Behaviour

## Cauliflower

Average Purchase **2.9** times per month

Average Consumption **7.3** times per month

- Cauliflower was most commonly purchased mainstream retail channels (Woolworths and Coles).
- A third of respondents purchased cauliflower from specialist vegetable retailers.
- Respondents indicated that they consumed cauliflower 7.3 times a month and purchased it 2.9 times a month.




Q1. On average, how often do you purchase cauliflower?
Q2. On average, how often do you consume cauliflower?
Q5. From which of the following channels do you typically purchase cauliflower?
Sample N=508

# Average Spend & Price Sensitivity
## Cauliflower

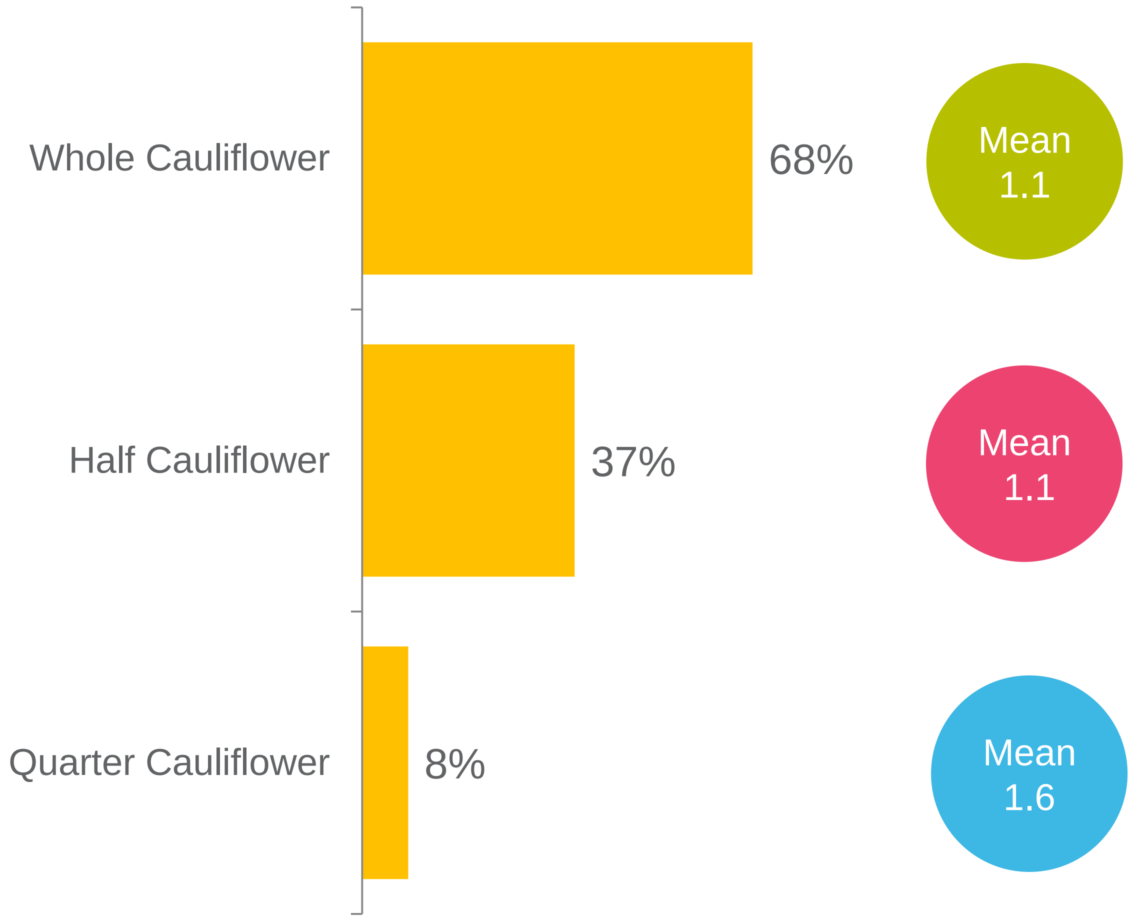
⇛ The average consumer typically purchased **1.0kg** of Cauliflower.

⇛ The average recalled last spend on Cauliflower was **$3.00**


⇛ Consumers perceived the average price for Cauliflower as good value for money **(6.3/10).**

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

# Pack Formats Purchased
## Cauliflower



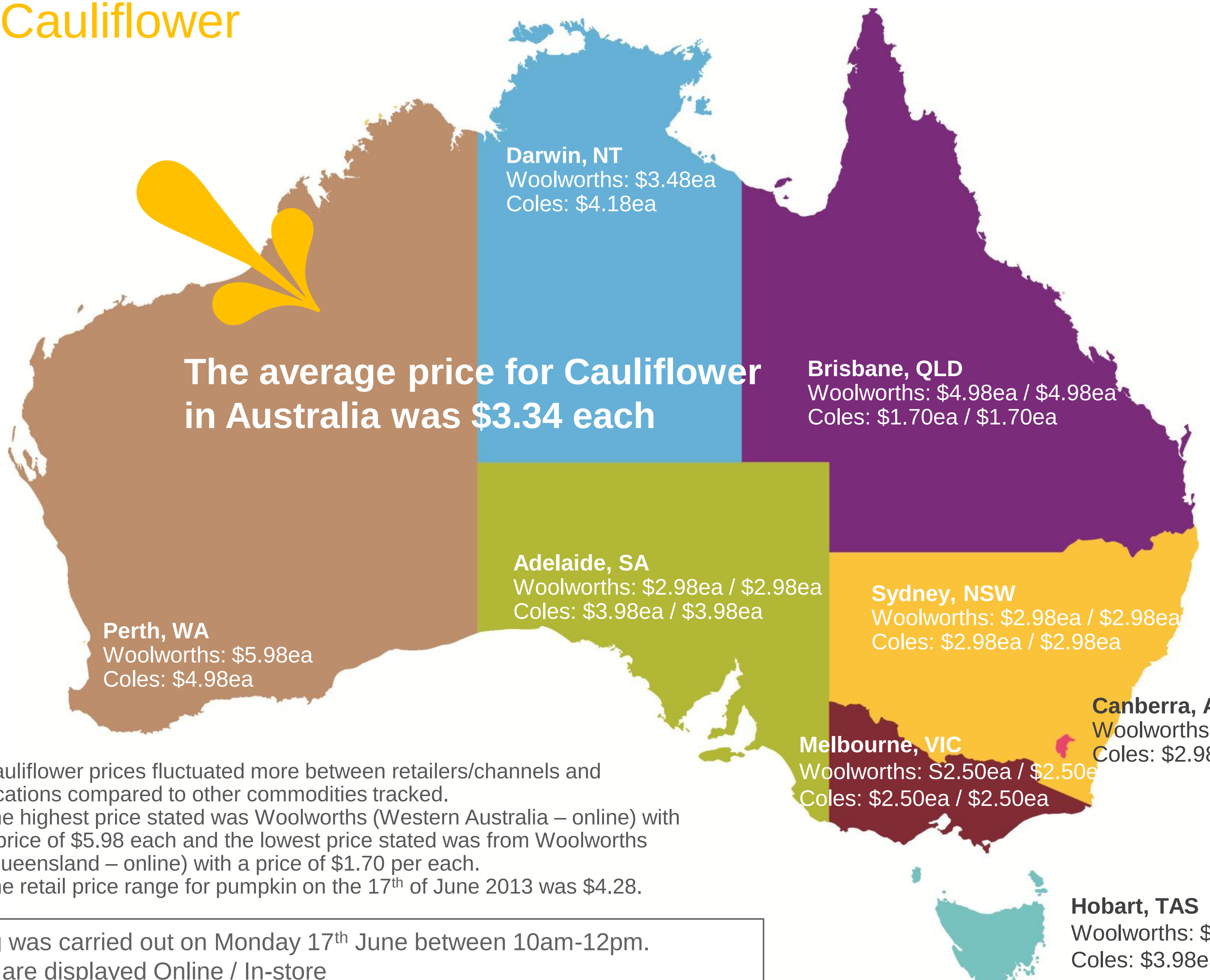

- Whole cauliflowers was the most common pack format purchased (68%).
- The typical amount of each pack format purchased if selected was 1.1 for whole and half cauliflowers.
- Quarter cauliflower formats was slightly higher with a mean of 1.6.

Q3a. How much cauliflower does this typically equate to?

# Online and In-store Commodity Prices



## Cauliflower

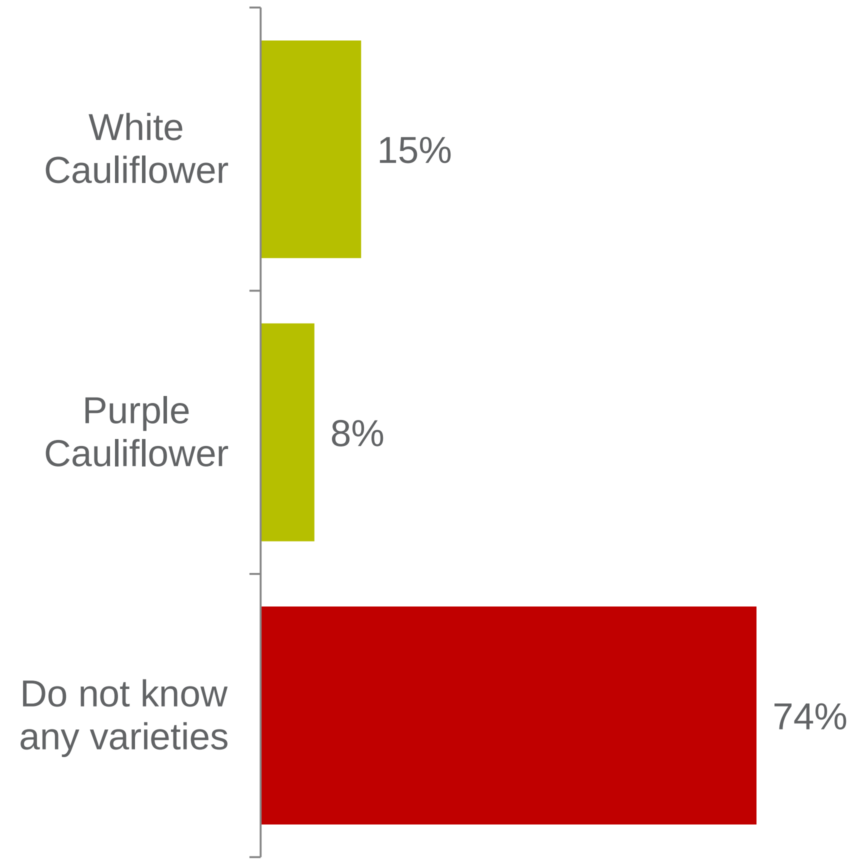



- Cauliflower prices fluctuated more between retailers/channels and locations compared to other commodities tracked.
- The highest price stated was Woolworths (Western Australia – online) with a price of $5.98 each and the lowest price stated was from Woolworths (Queensland – online) with a price of $1.70 per each.
- The retail price range for pumpkin on the 17th of June 2013 was $4.28.

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

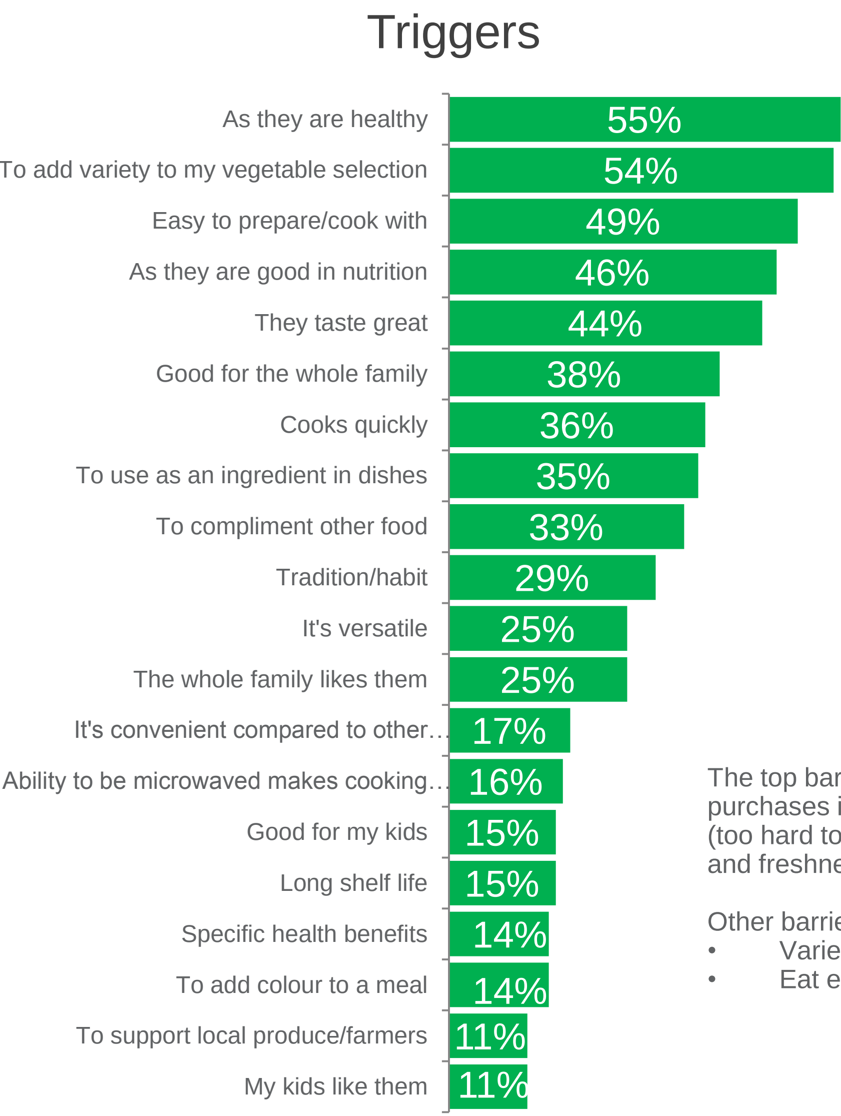
# Spontaneous Varietal Awareness & Purchase
## Cauliflower

- Recall/awareness of varieties of cauliflower was very low. Almost ¾ of respondents could not identify a cauliflower variety.
- Those that could identify a variety of cauliflower did so by mentioning a colour (either white or purple).




N=508
Q6a. What varieties of cauliflower are you aware of? (unprompted)

# Triggers & Barriers to Purchase
## Cauliflower




The top triggers to the purchase of cauliflower are health benefits, adding variety to vegetables purchased, taste and ease of cooking/preparation with.

The top barriers for cauliflower purchases is expensiveness, the size (too hard to store), limited availability and freshness (e.g. shelf life).

Other barriers mentioned were:
- Variety of vegetables
- Eat enough

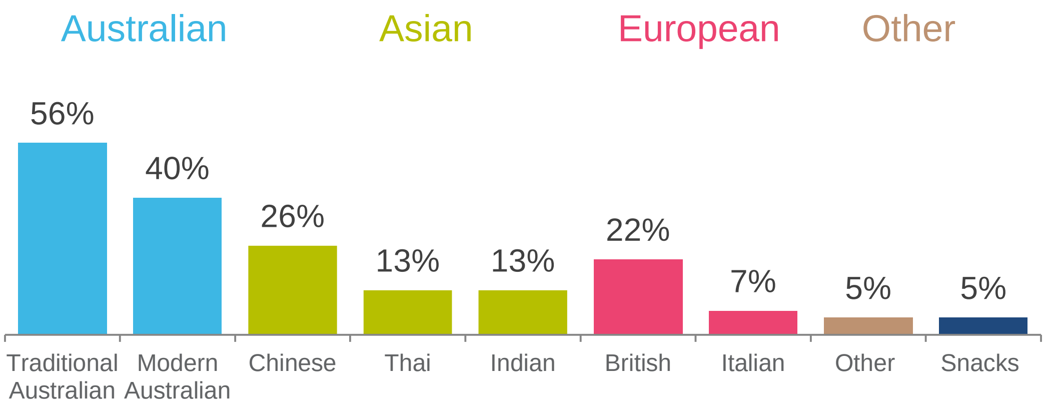

N=508
Q7. Which of the following reasons best describes why you purchase cauliflower?
Q8. Which reason best describes why you don't buy cauliflower more often?

colmar brunton.

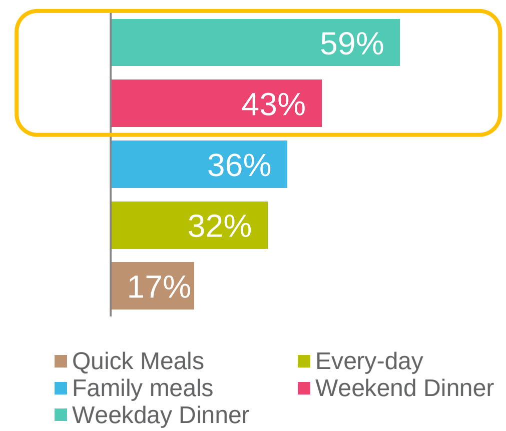
# Cooking Preferences & Occasions: Cauliflower

- Cauliflower was most commonly used in Australian Cuisine. Use in Asian and European cuisine was also popular.
- Cauliflower was quite versatile in how it is cooked. The top 3 methods were steaming, boiling and stir frying.
- Cauliflower accompanies many different vegetable types when cooked with. The 3 most common vegetables to accompany with are carrots, potatoes and broccoli.
- The top occasion for consumption of broccoli was dinner.

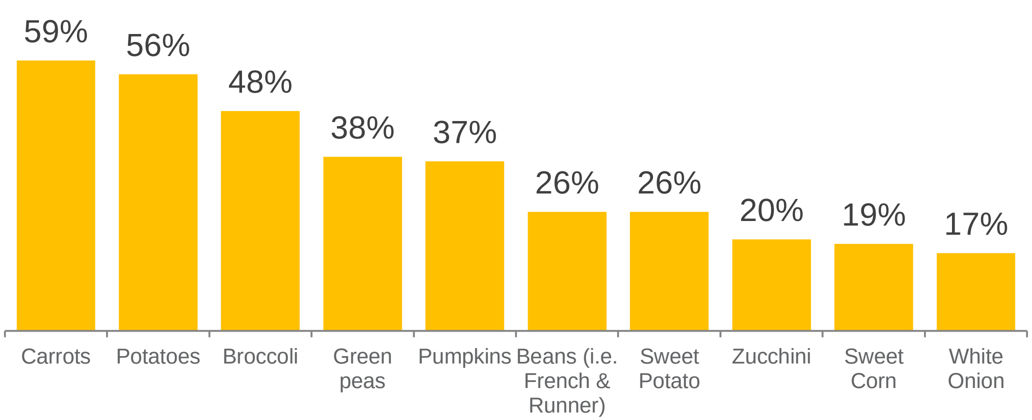
## Typical Cuisine Cooked




## Top 5 Consumption Occasions




## Top 10 Accompanying Vegetables

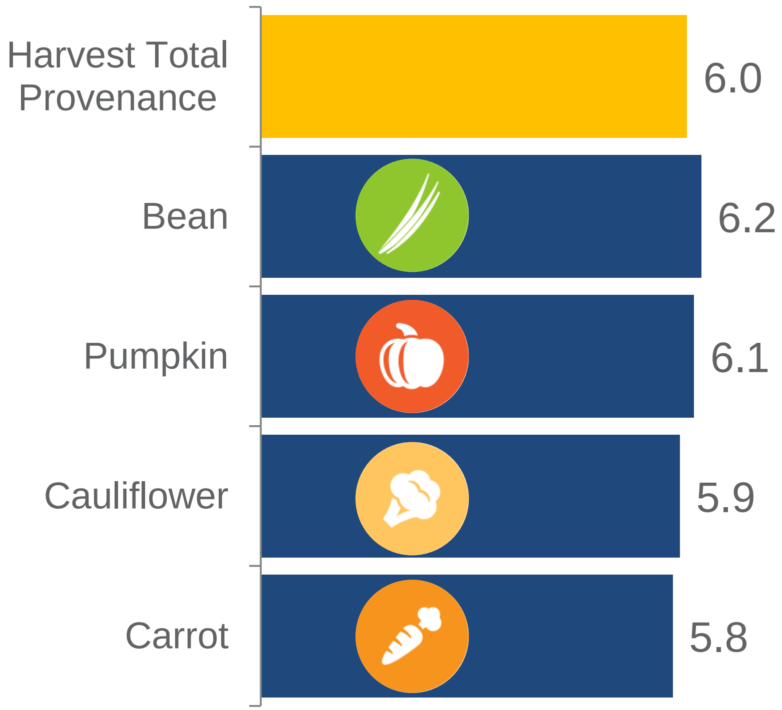



| Top 10 Cooking Styles | |
|---|---|
| Steaming | 56% |
| Boiling | 41% |
| Stir frying | 31% |
| Soup | 25% |
| Microwave | 24% |
| Baking | 14% |
| Stewing | 11% |
| Roasting | 10% |
| Raw | 9% |
| Blanche | 6% |

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

# Importance of Provenance

⇛ Provenance is relatively important for all commodities tracked.




AUSTRALIAN MADE®

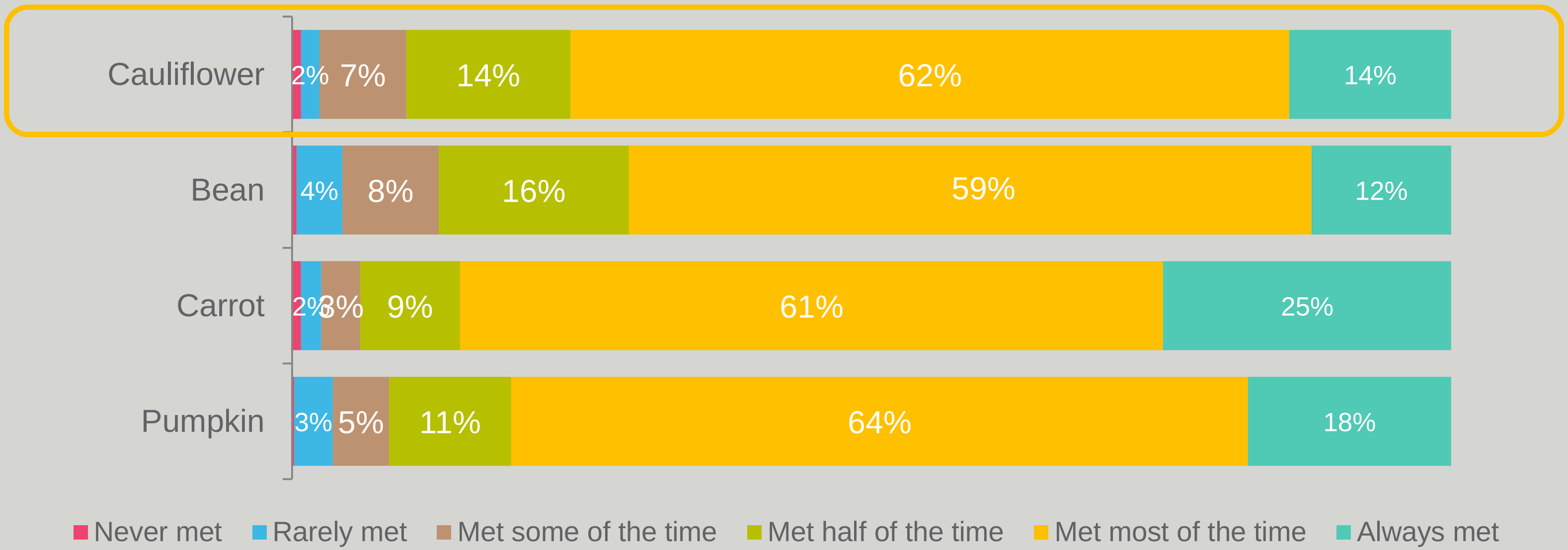
Q14. When purchasing <commodity>, how important is Provenance to you?
Bean N=506
Carrot N=511
Cauliflower N=508
Pumpkin N=513

# Freshness and Longevity

Fresh for
**8.6** days

- Cauliflower is expected to stay fresh for over 8 days after purchase.
- 14% of respondents stated freshness is always met whilst 62% stated it was met most of the time.
- 24% stated that cauliflower freshness is met at best only half of the time.

## Expectations Met




N=513
Q12. How long do you expect cauliflower to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy cauliflower?

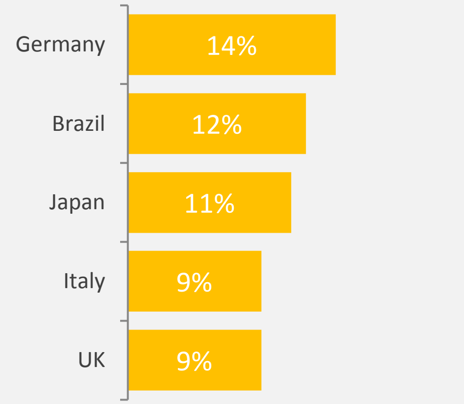
Cauliflower

# Cauliflower Global NPDs

## April–June 2013

There were 57 new products launched globally over the last 3 months that contained cauliflower as an ingredient. This is la low amount of launches compared to other commodities.
Launches were mainly in the fruit and vegetable category.
Development centred around ease of use and microwaveable products.

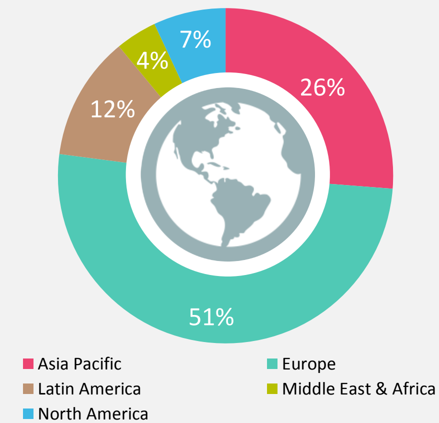
## Country



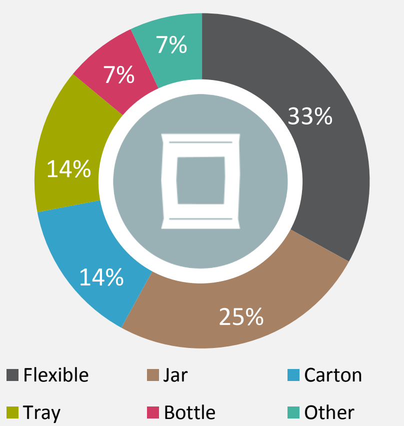



57 Global NPDs

## Region




## Top Pack Formats




## Categories

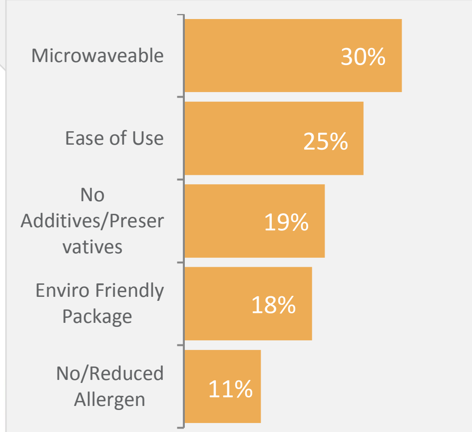
Fruit & Vegetables 32%

Meals 23%

Processed Products 19%

Juice Drinks 9%

## Top Claims



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

- A total of 57 products containing cauliflower as an ingredient were launched globally in the last 3 months, of which 2 were launched in Australia. Compared to other commodities being tracked this is a low amount. Most commodities typically have at least 100 launches globally every 3 months.
- The majority of the products that were launched were in Europe (51%), with Germany being the most active country for launches.
- Flexible and jar packaging were the top 2 pack formats used for the products launched (33% and 25% respectively).
- The top categories for launches were fruit and vegetables (32%), meals (23%) and processed, fish/met/egg products (19%).
- Convenience, environmentally friendly packaging and health claims were the top claims used for the products launched.
- There is little innovation in the product launches of cauliflower products compared to the other commodities being tracked. Launches of jarred vegetable mixes containing cauliflower are common and so are bags of cauliflower florets (examples of these products can be found at the end of the French and runner bean trend report).



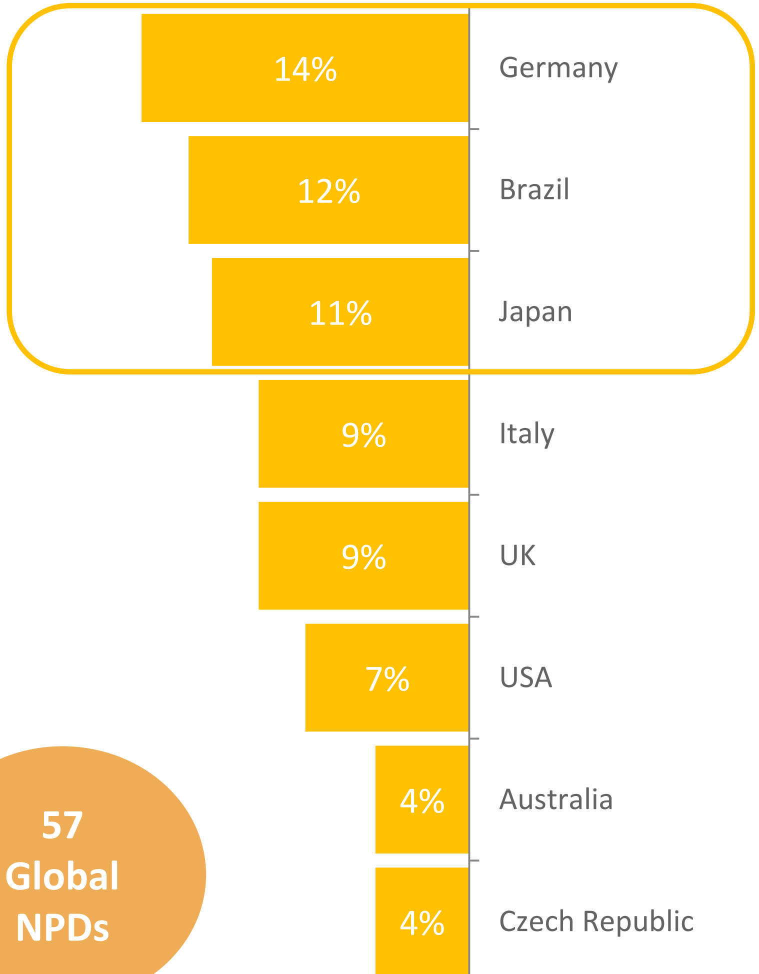
Source: Mintel (2013)

# Cauliflower SKUs

## Country, Region & Categories

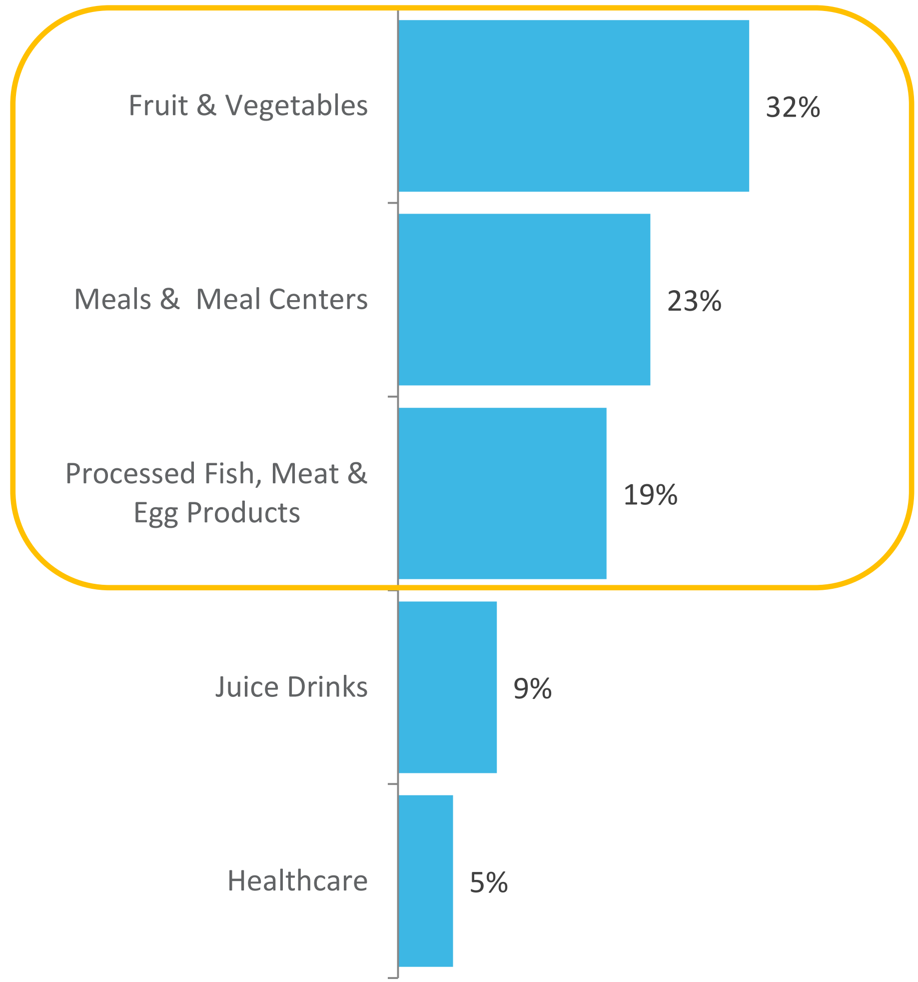
- The most active countries for cauliflower launches were Germany, Brazil and Japan.
- The top categories for launches were fruit and vegetables, meals and processed, fish/met/egg products.

### Top Launch Countries




57
Global
NPDs

### Top Launch Categories

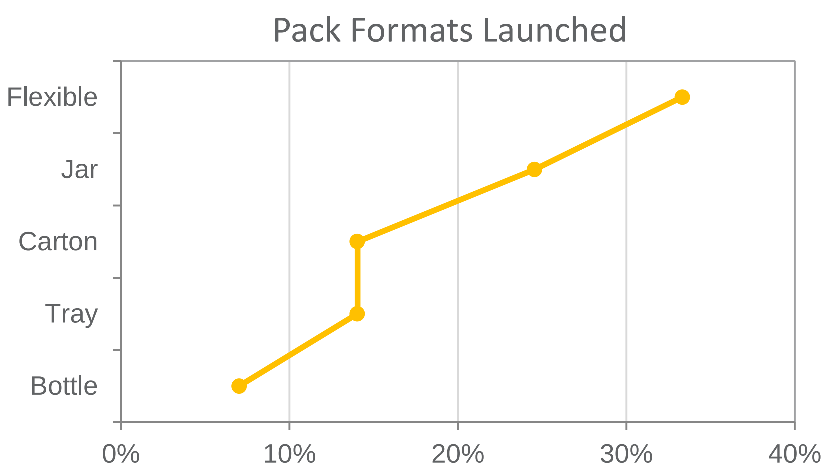


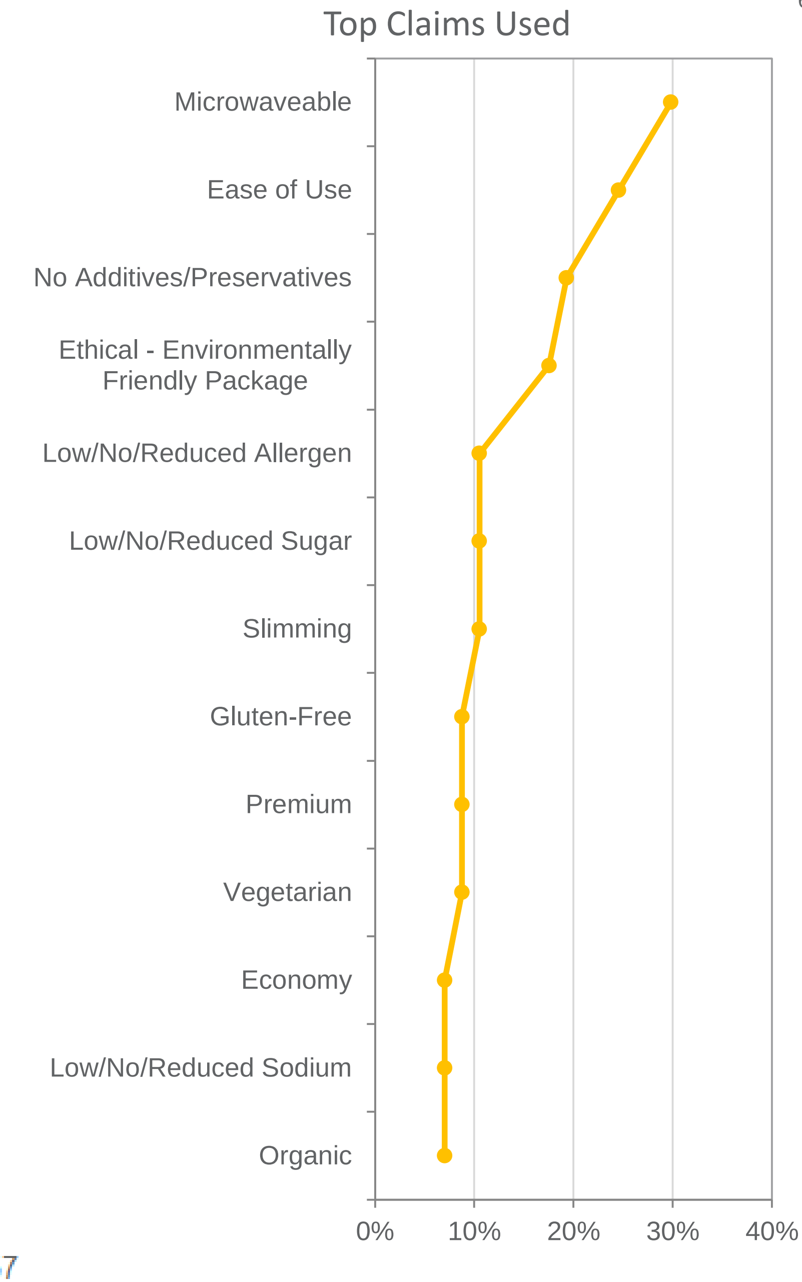

colmar brunton.

Number of Global Cauliflower NPDs for the L3M N=57

# Cauliflower SKUs
## Top Claims & Pack Formats Used

- Flexible packaging followed by jars were the top formats used for launches in the last 3 months.
- Convenience, environmentally friendly packaging and health claims were the top claims used for product launched.




Number of Global Cauliflower NPDs for the L3M N=57
Only shown at global level as no regions had more than 30 products launched.

# Innovative Cauliflower Launches:



## L3M (April-June 2013)

### Fruveco Paella (Czech Republic)

Fruveco Paella is made with rice and vegetables. The Spanish product is microwaveable and ready to heat. It retails in a 750g pack.


**Claims:**
Ease of Use, Microwaveable

### Posse do Corpo Carnes Light Portuguese Style Roast Beef (Brazil)

Posse do Corpo Carnes Light Carne Assada a Portuguesa Pure de Couve Flor E Arroz (Portuguese Style Roast Beef with Mashed Cauliflower and Rice) is a healthy light meal. This microwaveable product is simply heat and eat, made without preservatives, and retails in a 300g pack.


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

### Sunfrost Mixed Vegetables for Quiches (Israel)

Sunfrost Mixed Vegetables for Quiches are free from preservative and colours. This kosher certified product is microwaveable, and retails in an 800g pack. Also available is Shakshuka Mix which retails in a 680g pack, including a sachet of seasoning sauce.
.


**Claims:**
No Additives/Preservatives, Kosher, Microwaveable

### Selection Saint Eloi Bio Organic Cauliflower Florets (France)

Selection Saint Eloi Bio Choux-Fleurs en Fleurettes (Organic Cauliflower Florets) have been repackaged and are now available in a newly designed 500g pack containing about two portions. The product can be prepared in the microwave.


**Claims:**
Organic, Microwaveable

Source: Mintel (2013)

# Innovative Cauliflower Launches:
## L3M (April-June 2013)

### Market Pantry Giardiniera Mix (USA)

Market Pantry Giardiniera Mix is made with cauliflower, carrots, cucumbers, red peppers and pepperoncini. The economy kosher certified product retails in a 16 fl.-oz. pack.


**Claims:**
Kosher, Economy

### Marks & Spencer Eat Well Delicious & Nutritious Fenugreek Spiced Chicken and Roasted Cauliflower (UK)

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:**
Ease of Use, Low/No/Reduced Saturated Fat, Ethical - Environmentally Friendly Package, Microwaveable

### Perfekt Sweet And Sour Piccalilli (Netherlands)

Van Hunks Pumpkin Ale is brewed in Cape Town. The product is free from preservatives and retails in a 440ml bottle.


**Claims:**
N/A

### ConBìo Quinoa & Vegetables Salad (Italy)

ConBìo Insalata di Quinoa e Verdure (Quinoa & Vegetables Salad) can be pan cooked in four minutes and microwaved in one minute. The organic product is kosher certified and retails in a 200g recyclable pack.


**Claims:**
Ethical - Environmentally Friendly Package, Organic, Kosher, Microwaveable

Source: Mintel (2013)

# Innovative Cauliflower Launches:
## L3M (April-June 2013)

### Deluxe Tuna Fish Pesto (Germany)

Deluxe Pesto al Tonno (Tuna Fish Pesto) is made with vegetables and tuna fish. The premium product retails in a 190g jar.


**Claims:**
Premium

### Kagome Soy's Silky Blend Soy Drink (Japan)

Kagome Soy's Silky Blend Soy Drink is the result of blending 15 types of vegetables and three types of fruit. It contains iron, folic acid and isoflavone, while no sugar was added. It has a 30% reduced calorie content compared to processed soy milk. The product retails in a 200ml pack. Launched on March 12, 2013, with an RRP of 114 yen.


**Claims:**
Vitamin/Mineral Fortified, Low/No/Reduced Sugar, Low/No/Reduced Calorie

### All Seasons Frozen Vegetables with Fresh Cream (Germany)

All Seasons Rahm Kaisergemüse mit Frischer Sahne (Frozen Vegetables with Fresh Cream) comprises cauliflower, broccoli and carrot mix with fresh cream. The microwaveable and ready-to-serve product is ideal as a side dish for fish and fried meat dishes. It retails in a 750g pack.

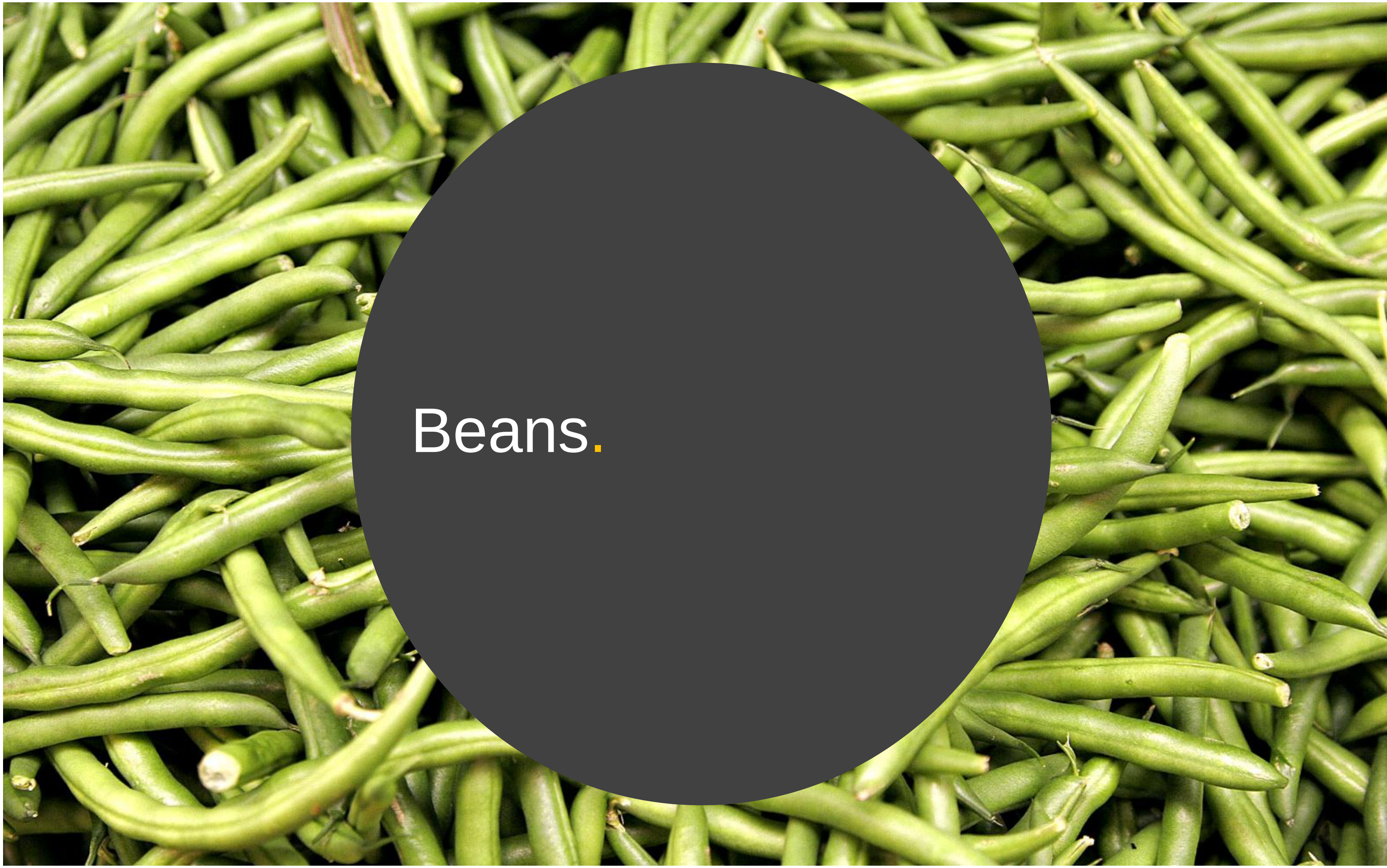

**Claims:**
Ease of Use, Microwaveable

### Iglo Feld Frisch Cauliflower (Germany)

Iglo Feld Frisch Blumenkohl (Cauliflower) has been frozen swiftly after harvesting, in order to protect vitamin content. The microwaveable and vegan product retails in a 400g recyclable pack, which carries the Iglo Forever Food logo.


**Claims:**
Vegan, No Animal Ingredients, Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Microwaveable

Source: Mintel (2013)



# Beans.

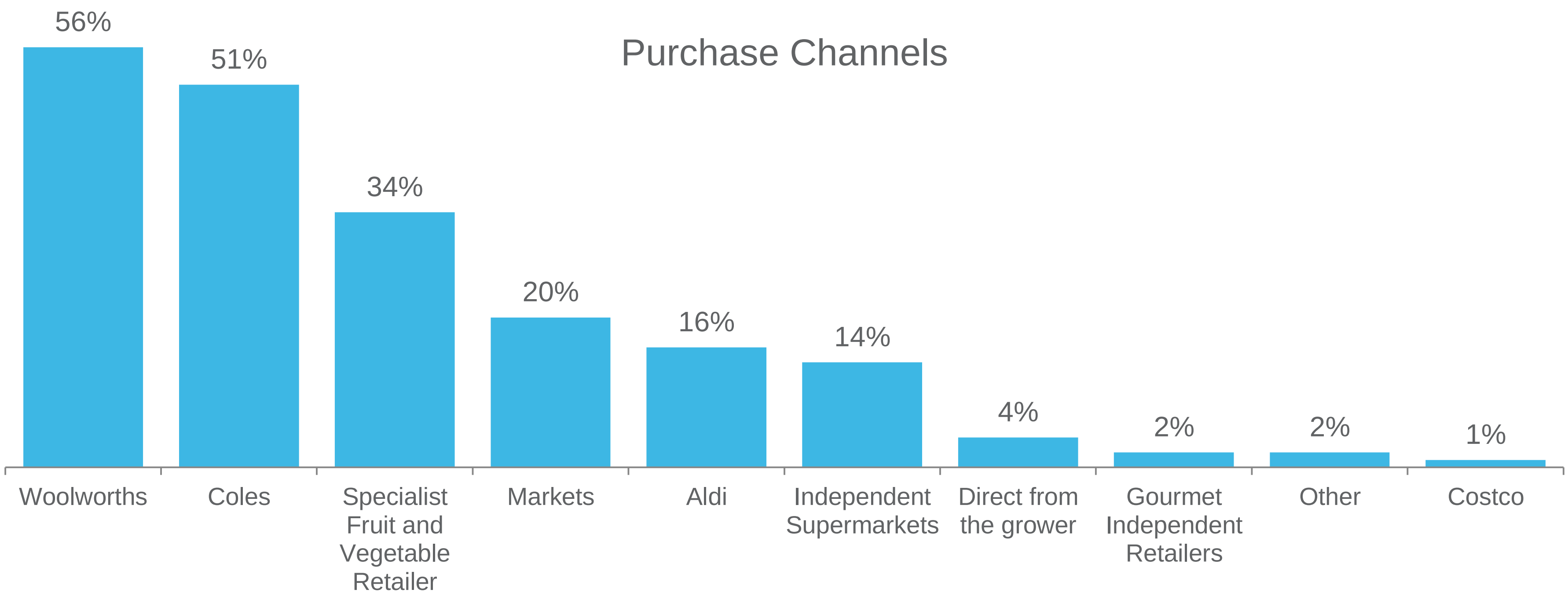
# Purchase and Consumption Behaviour

## French & Runner Beans

Average Purchase **3.8** times per month

Average Consumption **8.0** times per month

- French & runner beans are most commonly purchased through mainstream retail channels (Woolworths and Coles).
- Over a third of respondents purchased French and runner beans from specialist vegetable retailers.
- Respondents indicated that they consumed French and runner beans on average 8 times a month and purchased them 3.8 times a month.




Q1. On average, how often do you purchase French and runner beans?
Q2. On average, how often do you consume French and runner beans?
Q5. From which of the following channels do you typically purchase French and runner beans?
Sample N=506

colmar brunton.

# Average Spend & Price Sensitivity
## French & Runner Beans

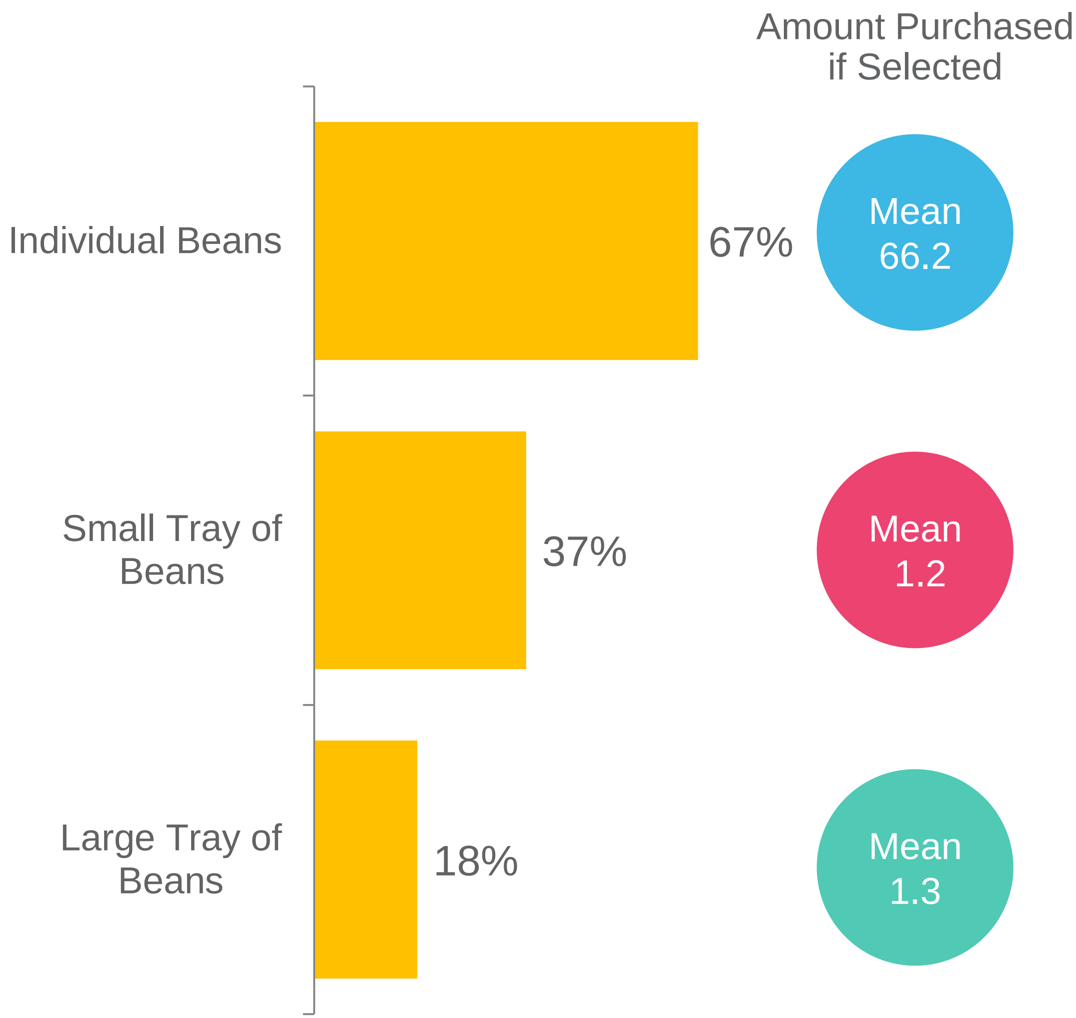
⇛ The average consumer typically purchases **0.9kg** of Beans.

⇛ The average recalled last spend on Cauliflower was **$3.40**


⇛ Consumers perceived the average price for Beans as good value for money **(6.3/10).**

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

# Pack Formats Purchased
## French & Runner Beans

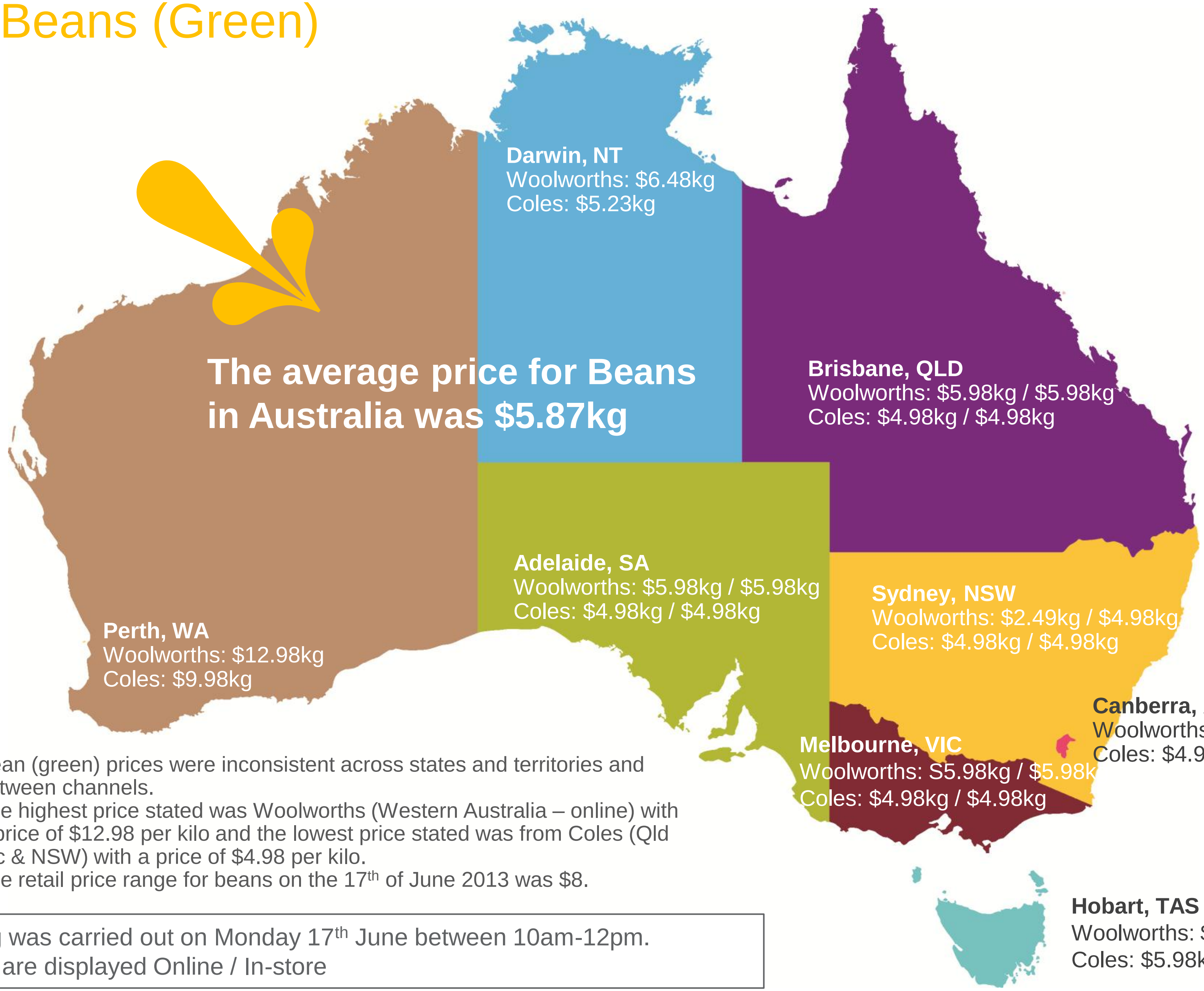



- Individual beans (loose format) was the most common format beans are purchased. On average 66 beans are purchased when purchased individually.
- Small trays was the second most common format (37%) where typically only 1 pack is purchased.

Q3a. How much French and runner beans does this typically equate to?

# Online and In-store Commodity Prices

## Beans (Green)

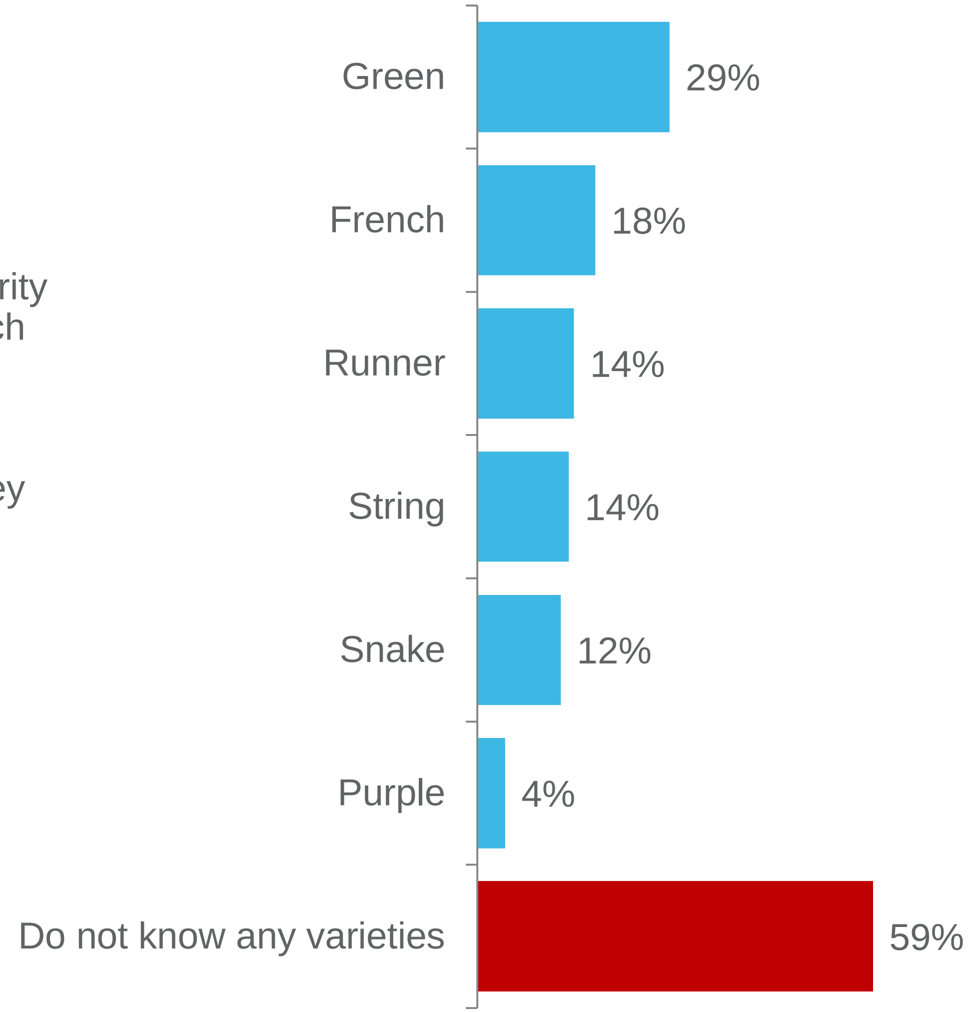



- Bean (green) prices were inconsistent across states and territories and between channels.
- The highest price stated was Woolworths (Western Australia – online) with a price of $12.98 per kilo and the lowest price stated was from Coles (Qld Vic & NSW) with a price of $4.98 per kilo.
- The retail price range for beans on the 17th of June 2013 was $8.

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

# Spontaneous Varietal Awareness & Purchase
## French and Runner Beans

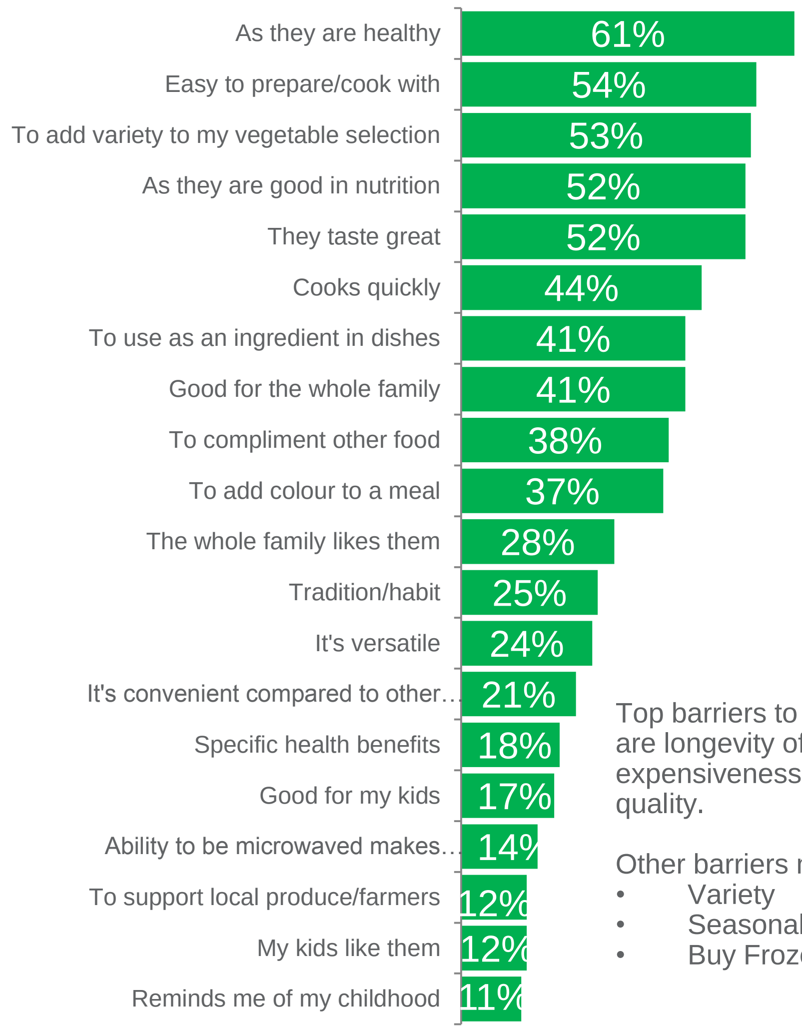
- Awareness of the varieties of French and runner beans was low. The majority of respondents who purchased French and runner beans did not know any varieties of Beans when asked.
- Of those that could recall the type they purchase, “green” beans had the highest recall.




N=506
Q6a. What varieties of French and runner beans are you aware of? (unprompted)

# Triggers & Barriers to Purchase

## French and Runner Beans




Top triggers to purchase were being healthy (nutritious), easy to cook/prepare and adding variety to vegetables consumed.

Top barriers to purchase were are longevity of freshness, expensiveness and inconsistent quality.

Other barriers mentioned were:
- Variety
- Seasonality (availability)
- Buy Frozen Beans instead


N=506

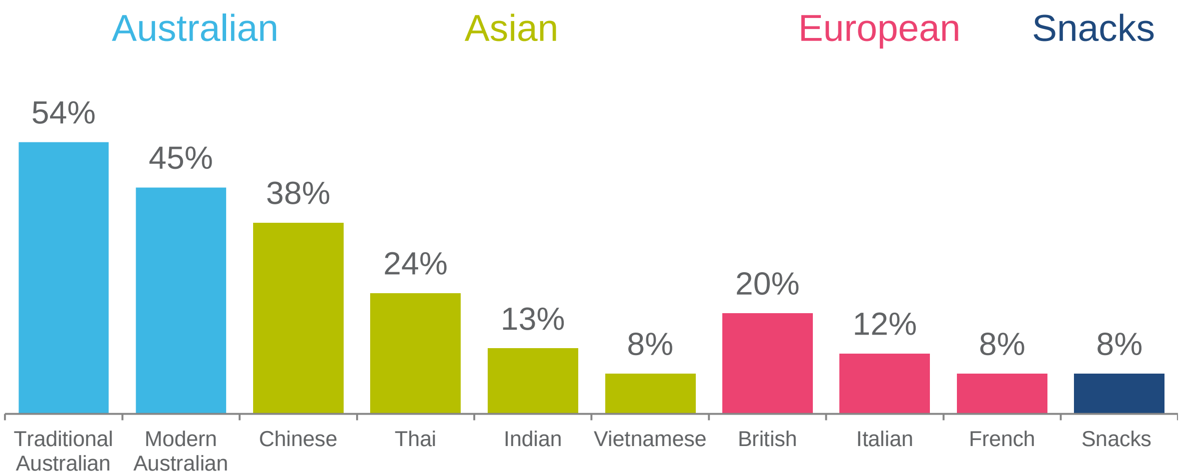
Q7. Which of the following reasons best describes why you purchase French and runner beans?

Q8. Which reason best describes why you don't buy French and runner beans more often?

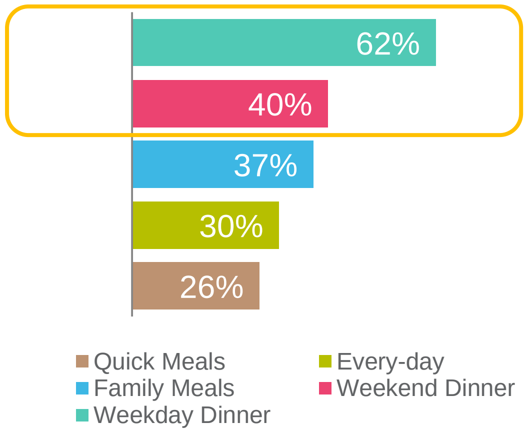
# Cooking Preferences & Occasions: French & Runner Beans

- Beans were most commonly used in Australian Cuisine. European and Asian cuisine is also popular.
- French and runner beans are typically cooked via steaming, stir frying, boiling or microwaving.
- French and runner beans are accompanied with many types of other vegetables. The top 3 being carrots, potatoes and broccoli.
- The top occasion for consumption of beans was dinner.

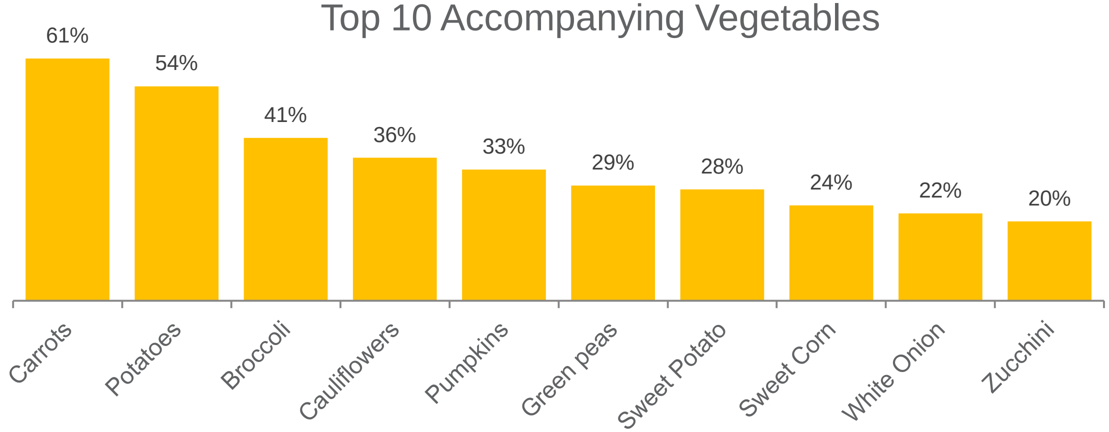
## Typical Cuisine Cooked




## Top 5 Consumption Occasions




## Top 10 Accompanying Vegetables

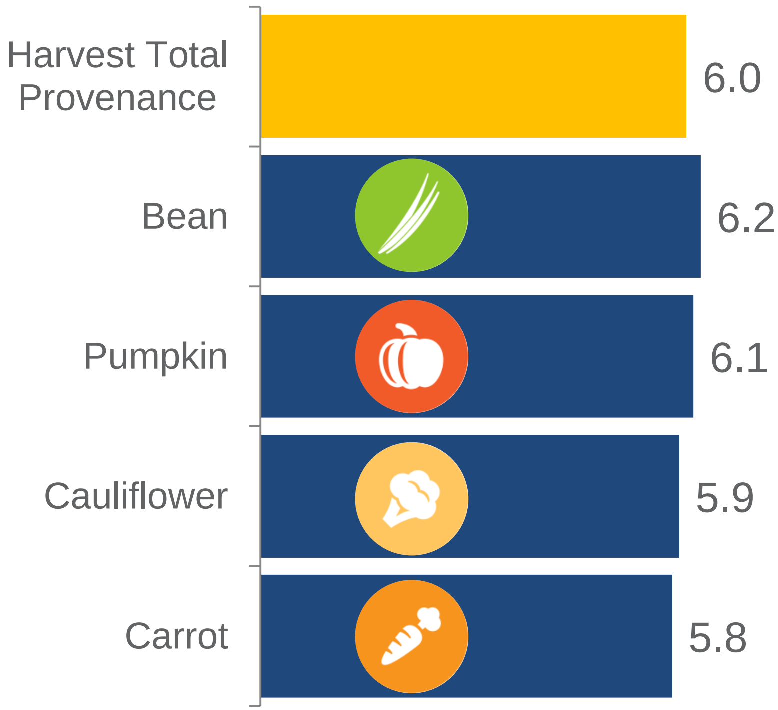



| Top 10 Cooking Styles | |
|---|---|
| Steaming | 55% |
| Stir frying | 47% |
| Boiling | 42% |
| Microwave | 25% |
| Soup | 16% |
| Raw | 14% |
| Stewing | 12% |
| Blanche | 10% |
| Sautéing | 10% |
| Frozen | 7% |

Q9. How do you typically cook French and runner beans?
Q10. What cuisines do you cook/consume that use French and runner beans?
Q10a. And when are you serving French and runner beans which of the following do you also serve together with this?
Q11. Which of the following occasions do you typically consume/use French and runner beans?

# Importance of Provenance

⇛ Provenance is relatively important for all commodities tracked.




Q14. When purchasing <commodity>, how important is Provenance to you?
Bean N=506
Carrot N=511
Cauliflower N=508
Pumpkin N=513

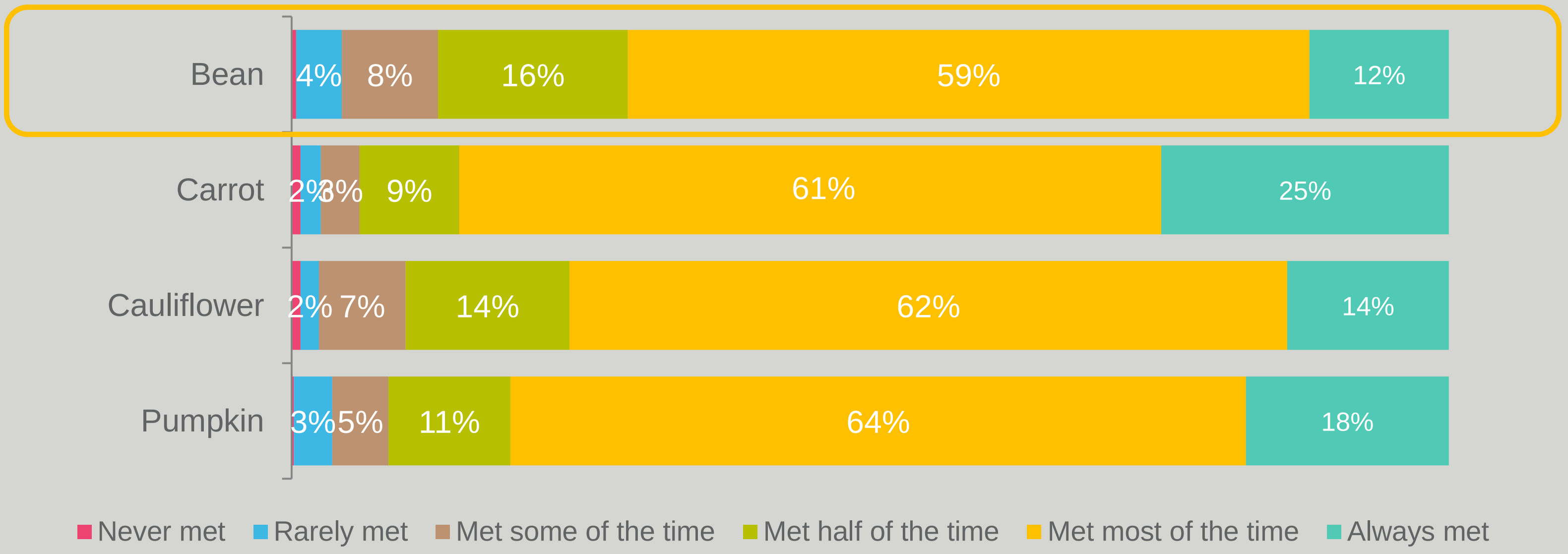
# Freshness and Longevity: French & Runner Beans



Expected
To stay
fresh for
**7.3** days

- Respondents indicated that they expected French and runner beans to stay fresh for 7.3 days once purchased.
- 12% of respondents stated freshness was always met whilst 59% stated it was met most of the time.
- 28% of respondents stated that French and runner beans freshness is met at best only half of the time.

## Expectations Met




N=513
Q12. How long do you expect French and runner beans to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy French and runner beans?

# French and Runner Beans Trends

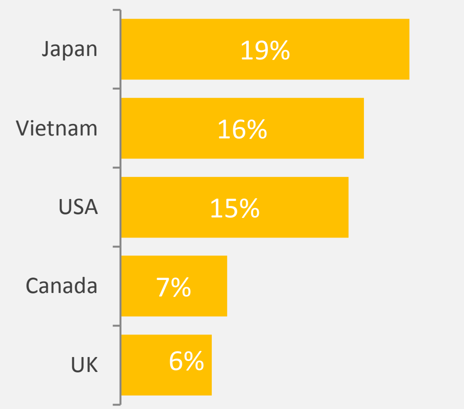
*Green Bean was the search term for Mintel

# French & Runner Bean Global NPDs

## April–June 2013

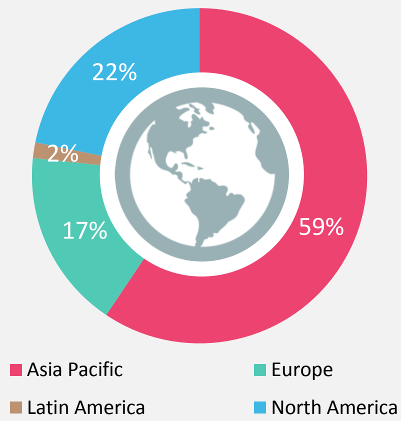
There were 133 new products launched over the last 3 months that contained French and runner beans as an ingredient.
The majority of launches occurred in the Asia Pacific region.
Top category launches were meals, bakery and dessert/ice cream goods.

## Country

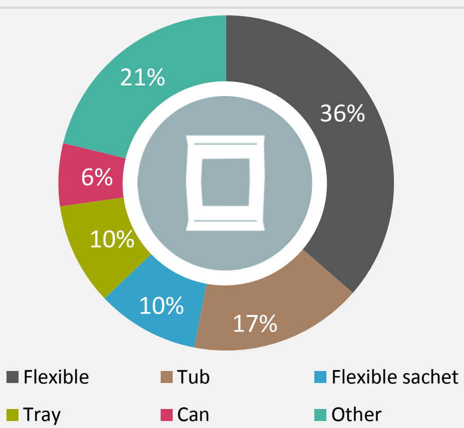



133 Global NPDs

## Region




## Top Pack Formats




## Categories

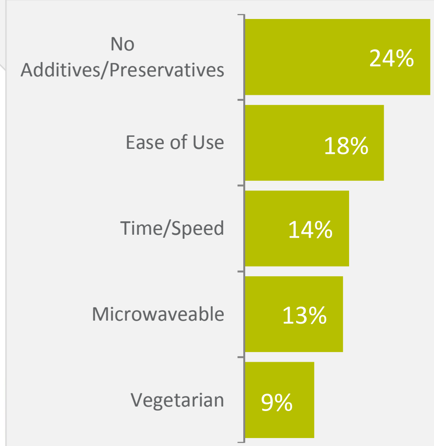
Meals 29%

Bakery 10%

Dessert & Ice Cream 10%

Snacks 7%

## Top Claims



# French & Runner Beans Product Launches:
## Last 3 Months (April-June 2013)
## Summary

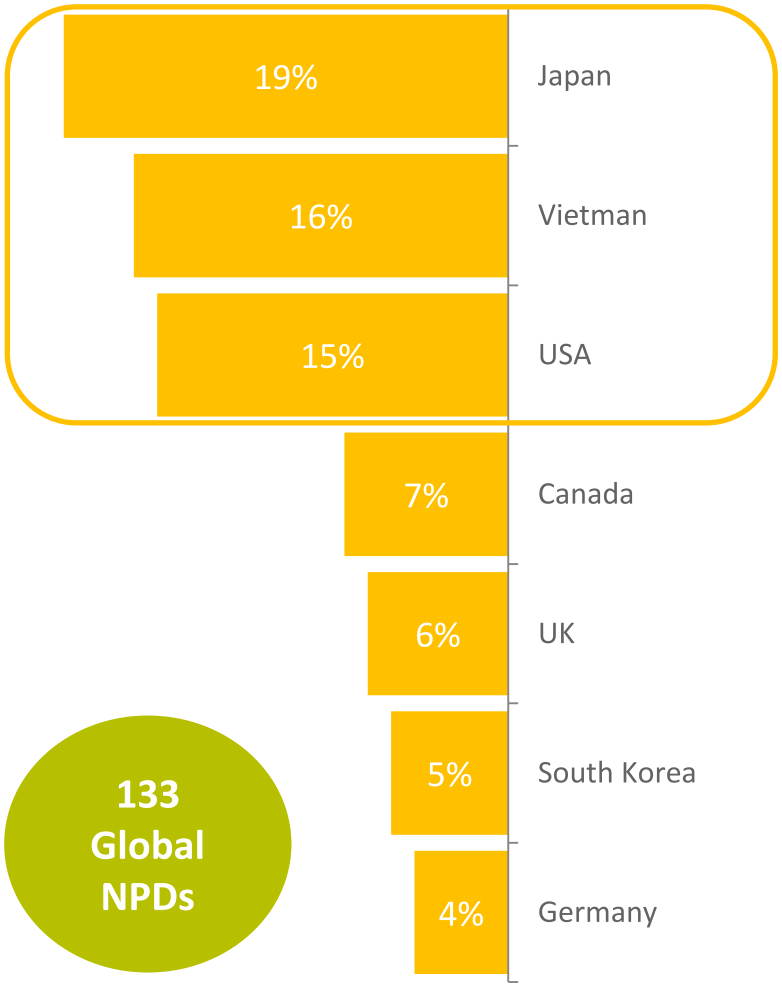
- A total of 133 products containing French and runner beans as an ingredient were launched globally in the last 3 months, 29 of which were launched in Australia.
- Asia Pacific and North America were the top 2 regions where these products were launched (59% and 22% respectively). Japan and Vietnam were the top 2 countries for launches in the last 3 months (19% and 16% respectively).
- Flexible followed by tub packaging were the 2 top pack formats used for the products launched in the last 3 months (36% and 17% respectively).
- The top categories for product launches were meals (29%), bakery goods (10%) and ice creams/desserts (11%).
- The core claims used for these launches globally were either convenience or health benefit based (e.g. no additives/preservatives 24%, ease of use 18% and quick to cook/prepare 14%).
- The most innovative launches found were; rock sugar green bean drink from Taiwan and green bean flavoured ice cream from Vietnam (examples of these products can be found at the end of the French and runner bean trend report).

Source: Mintel (2013)

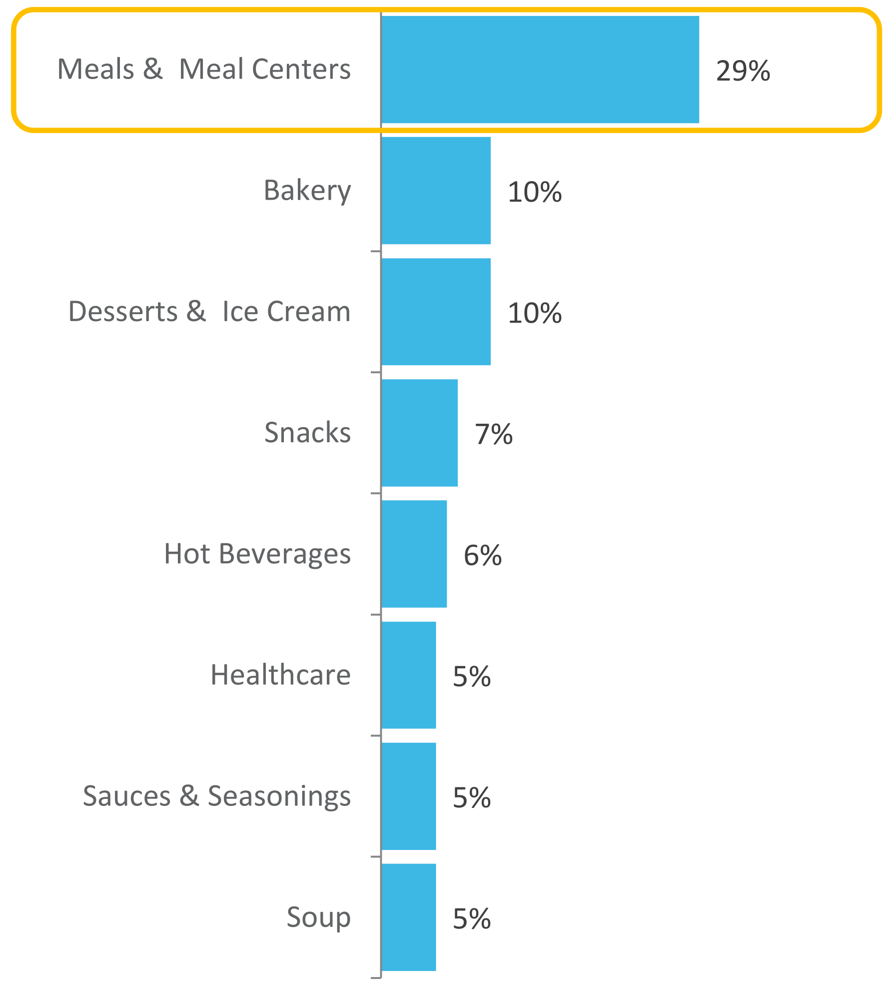
# French & Runner Beans SKUs
## Country, Region & Categories

- Japan, Vietnam and USA were the top countries where products were launched.
- Meals was the top category of which products were launched for this period.

### Top Launch Countries




### Top Launch Categories

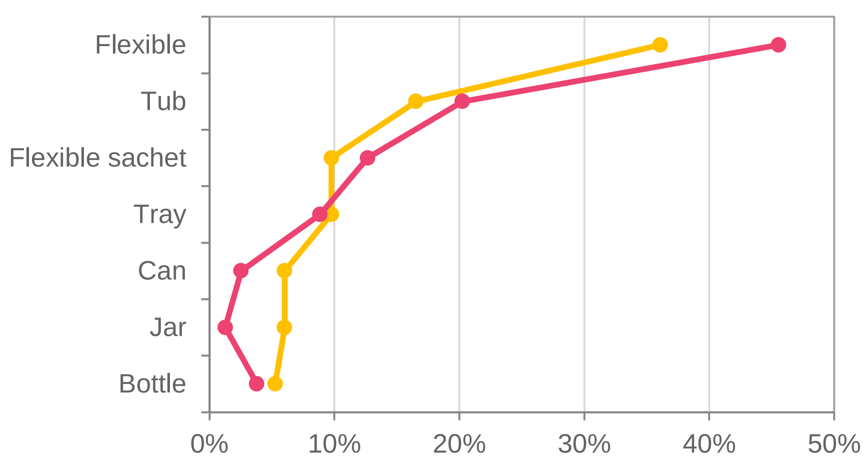



Number of Global Beans NPDs for the L3M N=133

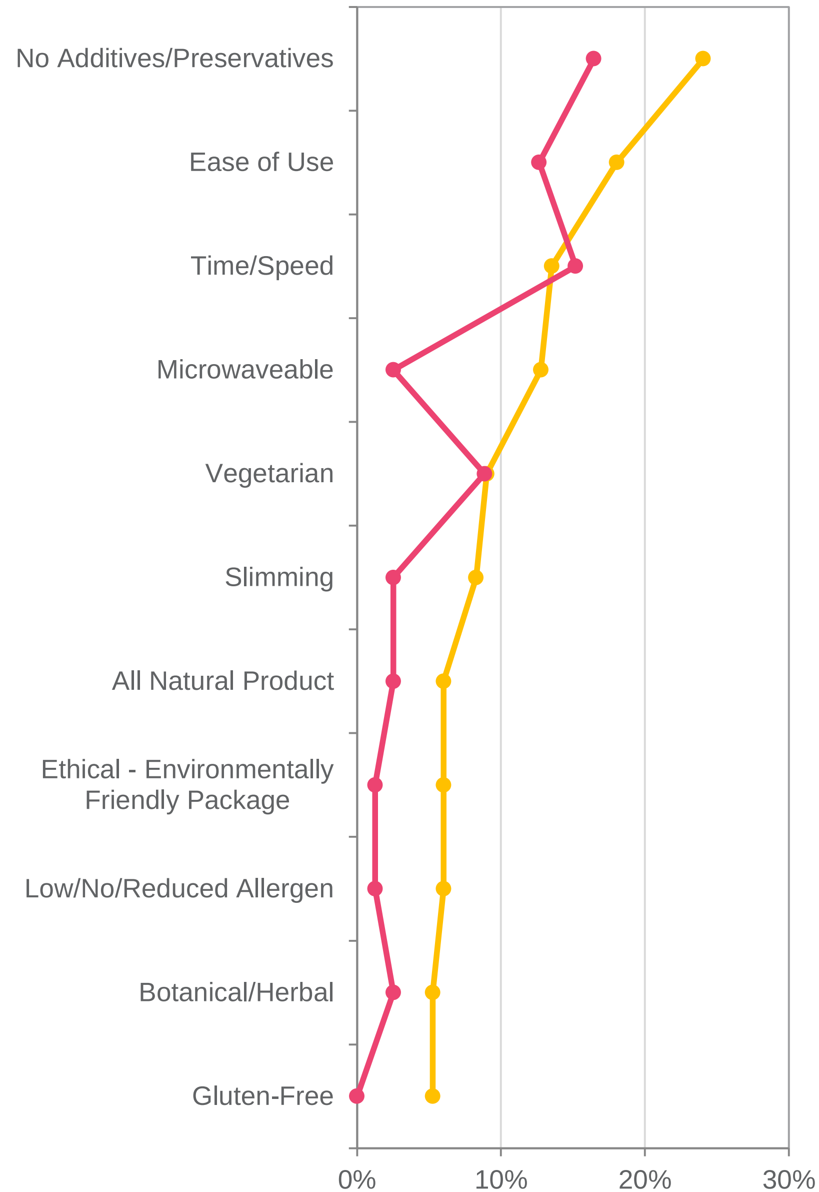
# French & Runner Bean SKUs
## Top Claims & Pack Formats Used

- Top claims for launches globally were no additives/preservatives, ease of use, time/speed (convenience), and being microwaveable.
- Globally the top pack formats used product launches was flexible packaging and tubs. This was consistent for all region launches.

Pack Formats Launched




Top Claims Used




Global N=133 Asia Pacific N=79

Number of Global NPDs for the L3M N=133
Only regions with n >30 are displayed

# Innovative French & Runner Bean Launches:
## L3M (April-June 2013)

### The Special Arms Zhi Wu Nai Niu Rock Sugar Green Bean Drink (Taiwan)

The Special Arms Zhi Wu Nai Niu Bing Tang Lv Dou Nong Jiang (Rock Sugar Green Bean Drink) has been repackaged and is now available in a newly designed 1L bottle. This rock sugar green bean drink is UHT treated and is processed using a Taiwanese technique. According the manufacturer, green bean is rich in plant protein, vitamins & calcium.

**Claims:**
N/A

### Merino X Yummy Green Bean Flavoured Ice Cream (Vietnam)

Merino X Yummy Kem Dau Xanh (Green Bean Flavoured Ice Cream) has been repackaged. It now retails in a 62g pack featuring a consumers competition to win prices.


**Claims:**
N/A

### Boots Shapers Red Thai Jungle Vegetable Curry & Jasmine Rice (UK)

Boots Shapers Red Thai Jungle Vegetable Curry & Jasmine Rice is suitable for vegetarians and consists of red curry served with jasmine Thai sticky rice, aubergines, butternut squash, green beans, water chestnuts and red peppers. It is microwavable and retails in a 400g pack, of which the sleeve is widely recycled.


**Claims:**
Vegetarian, Ethical - Environmentally Friendly Package, Slimming, Microwaveable

### Huong Sen Green Bean Balls (Vietnam)

Huong Sen Dau Xanh Vien (Green Bean Balls) are now available. The product retails in a 200g pack.


**Claims:**
N/A

# Innovative French & Runner Bean Launches:
## L3M (April-June 2013)

### Phu Gia Green Bean & Salted Egg Dumplings (Vietnam)

Phu Gia Banh Bao Nhan Dau Xanh Trung Muoi (Green Bean & Salted Egg Dumplings) are now available. This product retails in a 270g pack containing 6 x 45g pieces.


**Claims:**
N/A

### Viet San Premium Green Bean Vermicelli (Vietnam)

Viet San Mien Dau Xanh Cao Cap (Premium Green Bean Vermicelli) is now available. The special quality product retails in a 300g pack.

**Claims:**
Premium

### Mom to Mom Sharing Wisdom Green Beans, Peas & Pear Baby Food (USA)

Mom to Mom Sharing Wisdom Green Beans, Peas & Pear Baby Food is an all natural, kosher certified, stage two product for babies older than six months. The product contains pure fruit and vegetables, and retails in a 4-oz. convenient and portable, BPA-free pack.


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

### Carrefour Baby Potato & Green Bean Meal (France)

Carrefour Baby Pomme de Terre Haricot Vert (Potato & Green Bean Meal) is suitable for babies from four months onwards. It is free from gluten, colourings and preservatives, and can be heated in a microwave or bain-marie. The product retails in a 260g pack containing two 130g jars.


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

Source: Mintel (2013)

# Innovative French & Runner Bean Launches:
## L3M (April-June 2013)

### Jinjian / Gaea Gem Green Bean Noodles (China)

Jinjian / Gaea Gem Lv Dou Gua Mian (Green Bean Noodles) are free from thickener. This product retails in a 1kg pack. Jinjian / Gaea Gem also offers Ji Dan Wei Bo Wen Mian (Egg Flavoured Wavy Noodles), which are instant, non-fried and healthy.


**Claims:**
Time/Speed

### Qiao De Wang Buckwheat and Dried Green Bean Sheet (China)

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:**
N/A

### 41 Ginger Milk with Green Bean Powder Drink (Indonesia)

41 Minuman Serbuk Susu Jahe Kacang Hijau (Ginger Milk with Green Bean Powder Drink) is a new flavour variety in the range. This product is formulated with 41 week old red ginger, which is believed as being beneficial to maintain body's health.


**Claims:**
Other (Functional), Social Media

### Kirkland Signature Fire-Roasted Vegetable Blend (USA)

Kirkland Signature Fire-Roasted Vegetable Blend is a mixture of whole green beans, fire-roasted bell peppers and onions, sliced carrots, button mushrooms and sun-dried tomatoes, and is prepared with a balsamic butter sauce. The fast and super-easy to prepare product is retailed in a 3-lb. package containing 3 x 1-lb. bags.


**Claims:**
Ease of Use, Time/Speed

Source: Mintel (2013)

# In the Media.

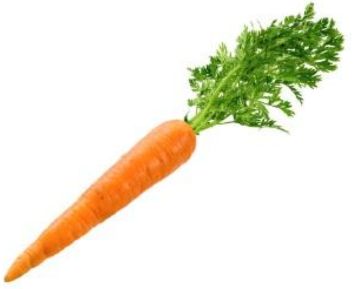
# General Vegetable News (April-June 2013)

- Simplot to close two plants in Bathurst and Devonport with job uncertainty.
- January floods in Queensland have disrupted planting timetables and caused vegetables across Australia to hit the market at the same time, causing prices to drop.
- ABS has reported a drop in vegetable prices for the past two successive quarters.
- This year, Food Standards Australia New Zealand (FSANZ) approved 200 nutritional and health properties that can be attributed to fresh vegetables.
- Fruit and vegetable boxes have been undergoing innovation to help growers tailor the ripening process to specific supply chains. (abc.net.au).
- 14% of online purchases in Australia are groceries. One of the largest company providers is Aussie Farmers Direct. (abc.net.au)

# Commodity News
## (April-June 2013)

- Article published in the Jewish Journal about cauliflower being "an under-appreciated" vegetable.
- Recent Nielsen data indicates that nearly a third of shoppers never purchase cauliflower (Vegetables Australia, May/June, p.22).
- Cauliflower Cream is a popular menu item for winter in top Australian restaurants.

- Feature article in Donna Hay magazine including variety descriptions and multiple recipes.
- Restaurant menus are featuring varieties of Pumpkin, particularly, Butternut Pumpkin. They are using it as a key ingredients in risotto and gnocchi.



- Western Australian vegetable company, Sumitch, has been given the go ahead to build a $5 million carrot washing and packing facility near Devonport in Northern Tasmania.
- Heirloom and Baby Carrots are popular varieties that are currently featured at top Australian restaurants. Carrot Puree, Confit Carrot and Honey Glazed Carrots are also listed as accompaniments on restaurant menus.

- Recent Nielsen data indicates that nearly half of shoppers never purchase green beans (Vegetables Australia, May/June, p.22).
- Beans are featured as sided dishes in Australia restaurants.