Monthly Tracker Report, Wave 10 March 2014, comparative Wave 2 and Wave 10
Commodities Tracked: Broccoli, Green Peas, Lettuce & Sweet Corn

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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 of and behaviour in relation to fresh vegetables.

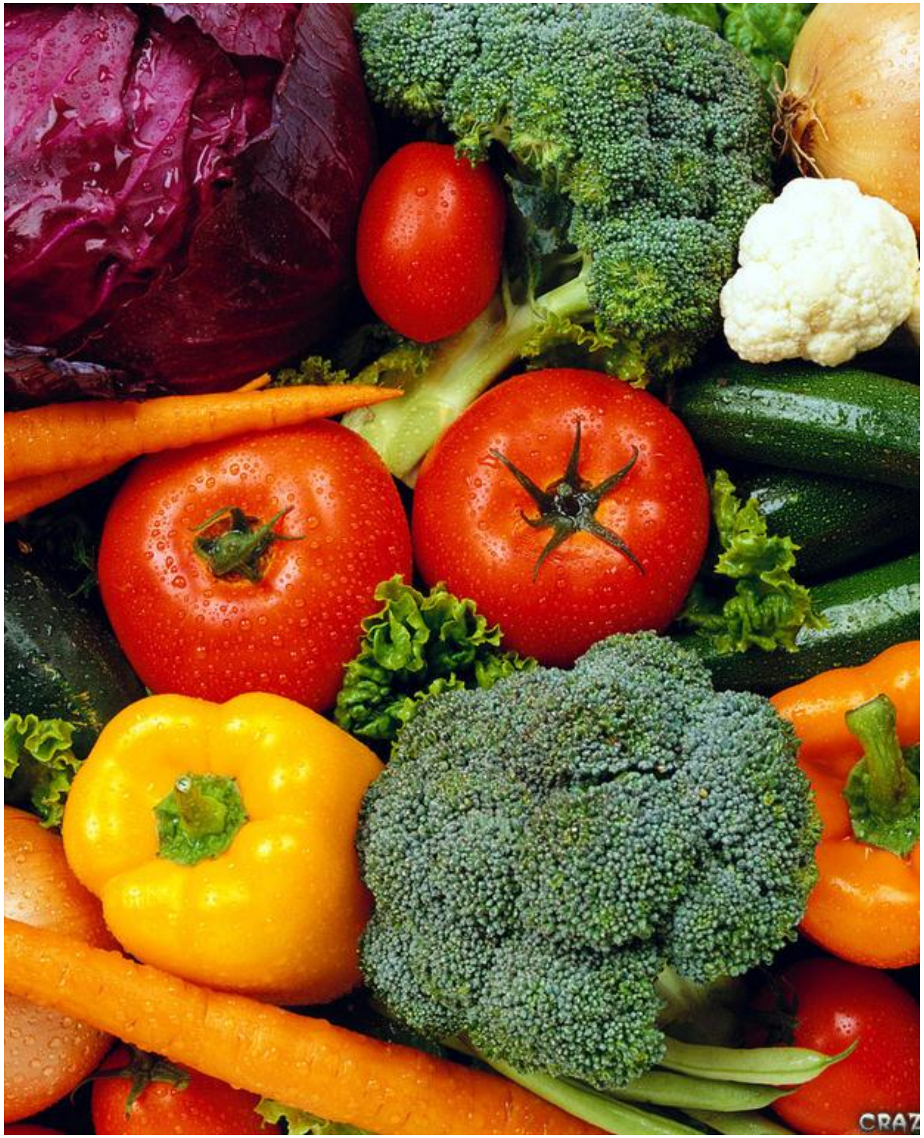
Colmar Brunton has been commissioned to conduct a monthly on-line tracking project following specified vegetables across a three year period; monthly trend analysis; and additional ad-hoc projects to assist in this understanding of consumers.

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 10, March 2014) focuses on:

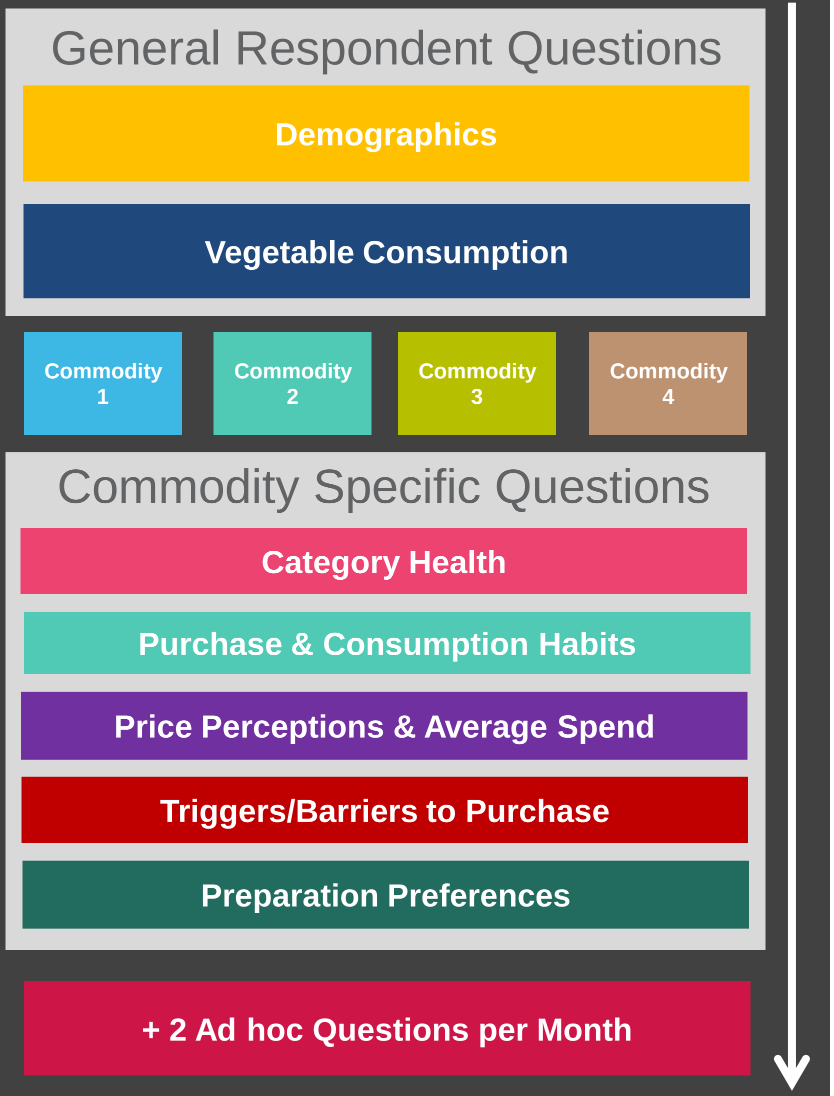
- Broccoli
- Green Peas
- Lettuce
- Sweet Corn

Essentially this is the third wave of tracking for these specific commodities, and as such, the current report will bring to light any change over the past few months, July 2013 (Wave 2) and November 2013 (Wave 6).



Online Methodology.

- Respondents were recruited via an Online Panel. If the respondents met the recruitment requirements of sufficient vegetable consumption (monthly) they were asked to complete the online questionnaire.
- All respondents completed general demographic and consumption questions. If respondents purchased any of the specific commodities within the last month they would complete those questions. A minimum of N=500 respondents completed the questionnaire.
- Topics covered in the questionnaire were vegetable purchase and consumption, category health, price and value perceptions, triggers and barriers to purchase and preparation and cooking preferences.
- An additional two ad-hoc questions were 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, 549 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=549	Broccoli n=322	Green Peas n=311	Lettuce n=326	Sweet Corn n=301
Gender					
Male	32%	29%	37%	30%	32%
Female	68%	71%	63%	70%	68%
Age					
18-29 y.o	15%	12%	16%	11%	15%
30-39 y.o	18%	18%	19%	16%	19%
40-49 y.o	23%	23%	20%	22%	25%
50-59 y.o	15%	15%	14%	16%	16%
60-69 y.o	20%	22%	21%	24%	16%
70+ y.o	9%	10%	10%	10%	8%
Household					
Single Income no Kids	17%	16%	17%	17%	17%
Double Income no kids	17%	14%	19%	14%	19%
Young Families	22%	23%	22%	22%	27%
Established Families	21%	23%	21%	21%	20%
Empty Nesters	22%	24%	22%	25%	18%
Location					
New South Wales	21%	19%	23%	19%	25%
Victoria	18%	20%	19%	18%	15%
South Australia	16%	14%	15%	15%	15%
Queensland	16%	18%	15%	19%	14%
Western Australia	16%	16%	15%	16%	16%
Tasmania	9%	9%	10%	8%	10%
Australian Capital Territory	4%	4%	3%	5%	4%
Northern Territory	0%	0%	0%	0%	0%

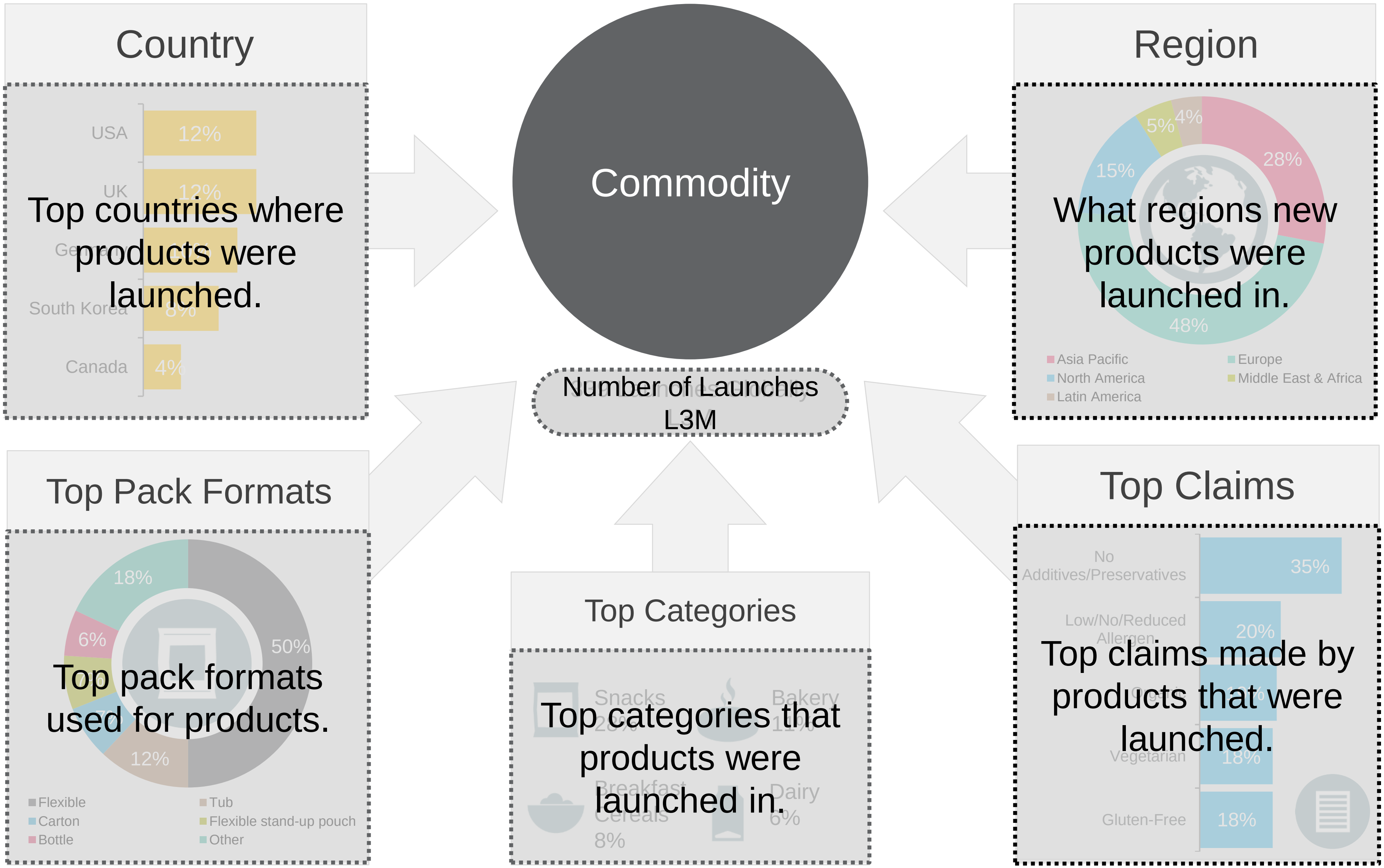
Trends Research: Our Approach

- Colmar Brunton has used a combination of both desk research and in the field market research to explore the trends for 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 three 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 10:
Executive Summary

Broccoli Grower Action Plan

34% Of respondents consume broccoli daily.

1.

Insight:

Broccoli is perceived as a staple vegetable for Australian & Asian cuisine.

Recommendation:

Re-invigorate broccoli's versatility in other cuisines to excite and grow the category.

2.

Insight:

700g is the average weight of broccoli purchased (consistent across all waves).

Recommendation:

Communicate this to retailers to potentially offer packs of broccoli in this size.

3.

Insight:

Medium & Large heads of broccoli more commonly purchased than small heads.

Recommendation:

Focus on providing medium and large broccoli heads instead of harvesting small heads.

Green Peas Grower Action Plan

6.2/10

Consumers' perceive Green Peas to be relatively fair value for money.

1.

Insight:

Green Peas are expected to stay fresh for 10 days with a high level of expectations being met.

Recommendation:

Capitalise on 'stay fresh' perceptions by promoting longevity to ensure consumers perform 'pantry stocking' behaviour to increase purchase and consumption frequency.

2.

Insight:

Main triggers to purchase were taste, health and convenience, but only 32% used for quick meals.

Recommendation:

Consider new product development in snacks and on-the-go healthy products that can take advantage of key triggers to purchase and increase consumption occasions.

3.

Insight:

Expense is a key barrier to purchase.

Recommendation:

Educate consumers on value perceptions that command price premium, such as a gourmet offering.

Lettuce Grower Action Plan

6%

Of consumers indicated that they would purchase more lettuce in the future than they currently do.

1.

Insight:

Importance of provenance is consistently increasing. Provenance is linked to freshness and often quality in the consumer's mind.

Recommendation:

Growers should consider approaching Retailers/Packers with a request to display provenance (ie. in supermarket catalogues) that command a price premium.

2.

Insight:

Consumers revealed strong repertoire and use of multiple types of lettuce, but little indication of increasing overall lettuce consumption.

Recommendation:

Innovation is required to increase fresh consumption. Consider seeking consumer opinions on global innovations that may work in the Australian context.

3.

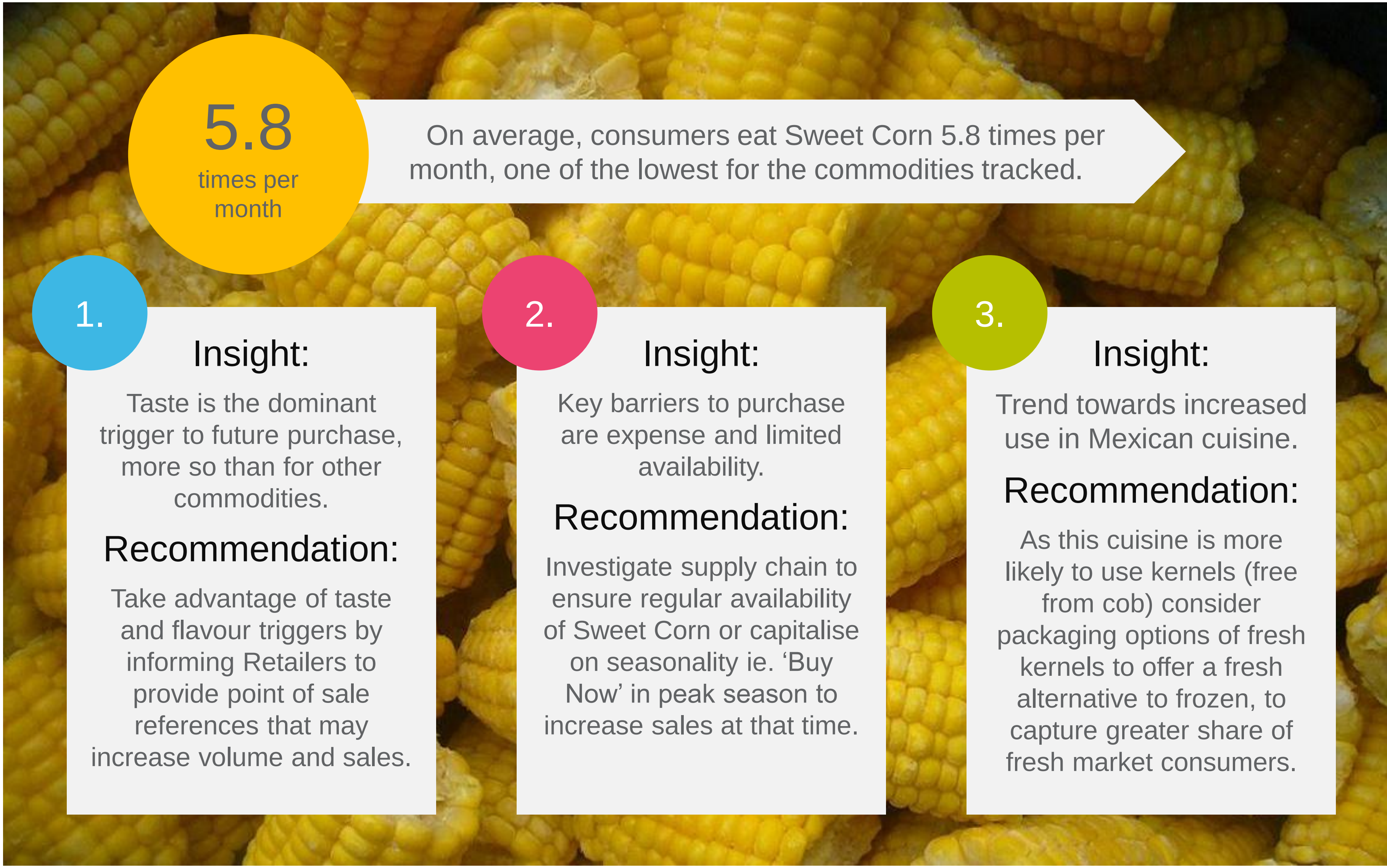
Insight:

Strong global activity for lettuce product innovation, particularly in skincare. However, only two products were launched in Australia in last three months.

Recommendation:

Consider complementary and dual sales channels to differing industries to expand sales from fresh only.

Sweet Corn Grower Action Plan



5.8
times per month

On average, consumers eat Sweet Corn 5.8 times per month, one of the lowest for the commodities tracked.

1.

Insight:

Taste is the dominant trigger to future purchase, more so than for other commodities.

Recommendation:

Take advantage of taste and flavour triggers by informing Retailers to provide point of sale references that may increase volume and sales.

2.

Insight:

Key barriers to purchase are expense and limited availability.

Recommendation:

Investigate supply chain to ensure regular availability of Sweet Corn or capitalise on seasonality ie. ‘Buy Now’ in peak season to increase sales at that time.

3.

Insight:

Trend towards increased use in Mexican cuisine.

Recommendation:

As this cuisine is more likely to use kernels (free from cob) consider packaging options of fresh kernels to offer a fresh alternative to frozen, to capture greater share of fresh market consumers.

Wave 10: Fact Base
(1 of 2)

Broccoli:

- The average volume purchased for broccoli has remained unchanged at 700g across all waves tracked.
- Individual broccoli was the most common format purchased across all waves tracked.
- Medium & large heads are more commonly purchased than small.
- Broccoli was purchased on average 4.3 times per month and consumed 9.9 times.
- Average recalled last spend was $3.52 and overall, broccoli was perceived to be good value (6.1/10).
- Overall awareness of broccoli types remained low, with 59% of respondents unable to recall a variety.
- The key triggers to purchase were health/nutrition benefits and variety to diet, whereas expense and short shelf life were the top barriers.
- Broccoli was primarily used in Australian and Chinese cuisine and had a high proportion of respondents consuming it daily (35%, no change over last 3 months).

Green Peas:

- Green peas was purchased on average 3.9 times per month and consumed 10.2 times per month. This was consistent with Wave 2 and 6.
- Consumers typically purchase 800g of Green peas. Recalled last spend was $4.45, which was higher than previous months. Overall, Green peas were perceived as fair value for money.
- Price analysis revealed Snow Peas were $14.62 per kg in March, which was in line with November 2013 prices.
- Approximately half of respondents were unable to recall a type of Green peas, however there was a trend towards increased recall.
- Main triggers to purchase were taste, health and convenience factors. Top barriers to purchase were price, limited availability and poor quality.
- Green peas were usually cooked for dinner in Australian cuisine, both traditional and modern.
- Green peas were expected to remain fresh for 10 days and expectations of freshness were generally met, in line with previous waves.

Wave 10: Fact Base
(2 of 2)

Lettuce:

- Lettuce was purchased on average 4.6 times per month and consumed 14.2 times per month, which was in line with previous waves.
- On average 700g of lettuce was purchased per shop. Recalled last spend was $3.50 and this was perceived to be only fair value for money.
- Whole lettuce remained the most common format purchased, and usually a single unit was bought.
- Price tracking revealed an average price of $2.91 per Iceberg lettuce head. Since Wave 2 there has been an increase in national average price.
- There was strong awareness of lettuce types, with over a half of consumers able to recall Iceberg and Cos lettuce.
- Key triggers to purchase were to complement other food, health and convenience factors. The main barrier to purchase was short shelf life. There was a trend towards consumers growing their own as well.
- Lettuce was expected to stay fresh for over a week, however expectations of freshness were less likely to be met than previous waves.

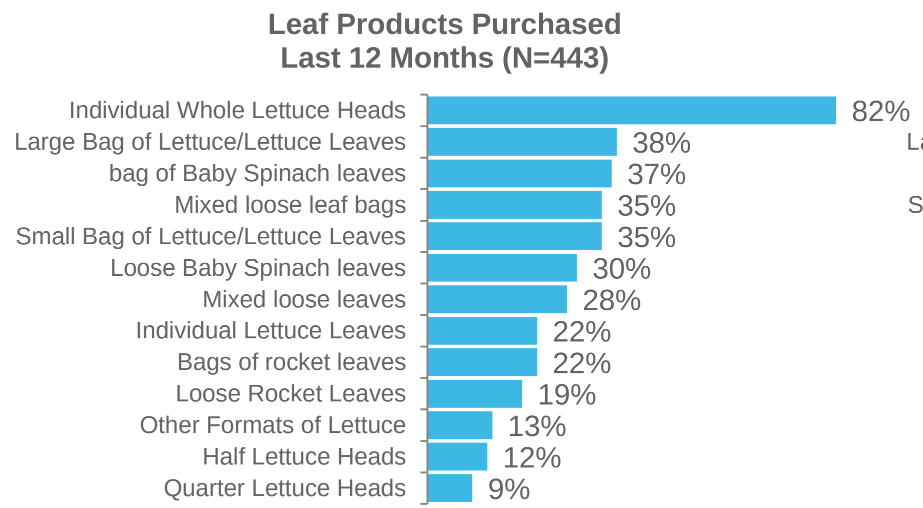
Sweet corn:

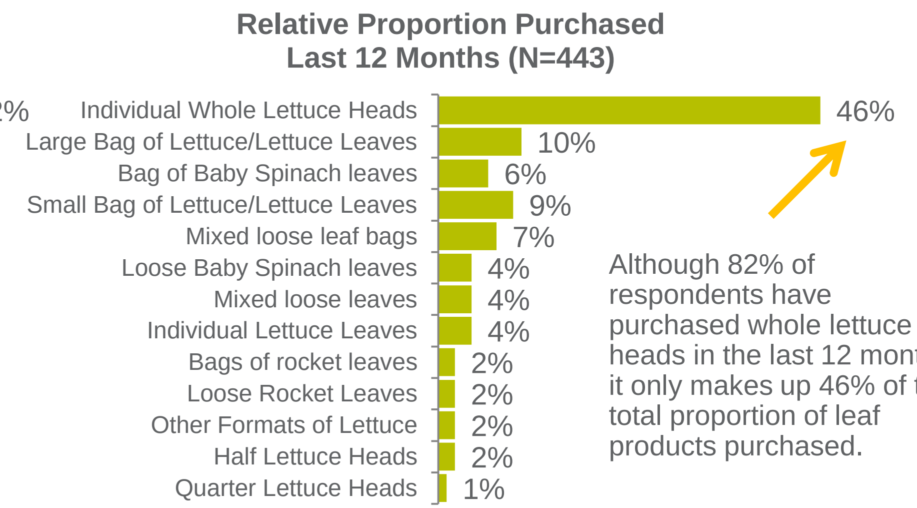
- Purchase frequency of Sweet corn was 3.0 times per month and on average was consumed 5.8 times per month, both of these were lower than Wave 2 and 6.
- 900g of Sweet corn was consistently purchased. Recalled last spend was somewhat lower than November at $3.62. Overall Sweet corn was perceived as good value for money (6.5/10).
- Analysis of retail channels indicated the average price per cob was $1.01, which was lower than Wave 6.
- Awareness of Sweet corn remained low, with approximately ¾ of consumers unable to recall a type.
- Taste was the dominant trigger to future purchase, whilst expense and limited availability were the main barriers to purchase.
- Sweet corn provenance was increasingly important to consumers.
- Sweet corn was expected to stay fresh for over a week, which was consistent with previous waves, however expectations of freshness was somewhat lower compared with Wave 2 and 6.

Wave 10:
Ad-Hoc Questions

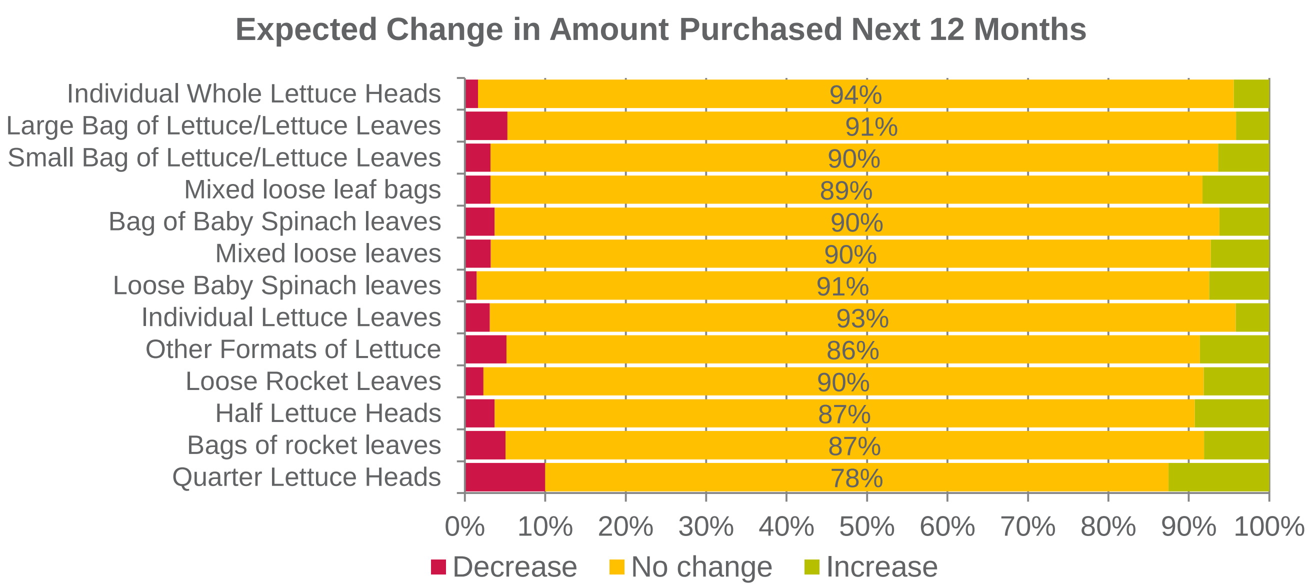
Lettuce & Leaf Produce Intended Usage

Next 12 Months





Although 82% of respondents have purchased whole lettuce heads in the last 12 months, it only makes up 46% of the total proportion of leaf products purchased.



Overall there is little change expected in the purchase behaviours of lettuce/loose leaf consumers in the next 12 months.

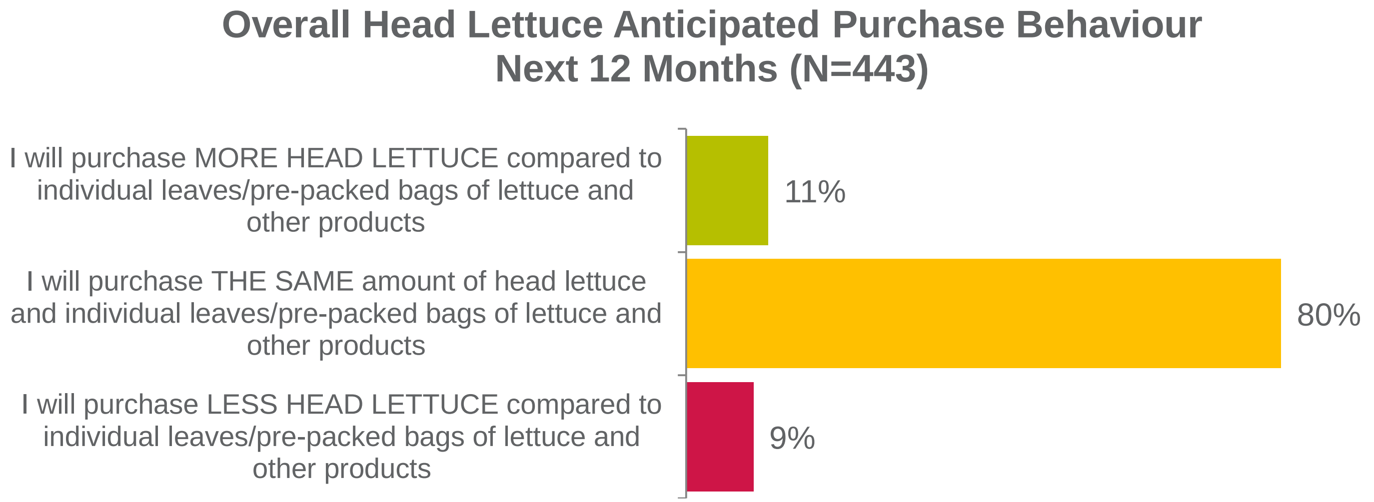
The most common leaf format to purchase are whole lettuce followed by pre-packaged bags.

AHQ1. For each of the following formats, can you please place a percentage value (%) for each of the following types of leafed products below, based on the relative amount you have purchased in the LAST 12 months.
AHQ2. And considering the NEXT 12 MONTHS, can you please indicate where you plan to increase or decrease (%) each of the following types of leaf products you intend to purchase.
AHQ3. And overall, which statement best represents your lettuce purchase behaviour over the NEXT 12 MONTHS.
Total Respondents N=443

Lettuce & Leaf Produce Intended Usage

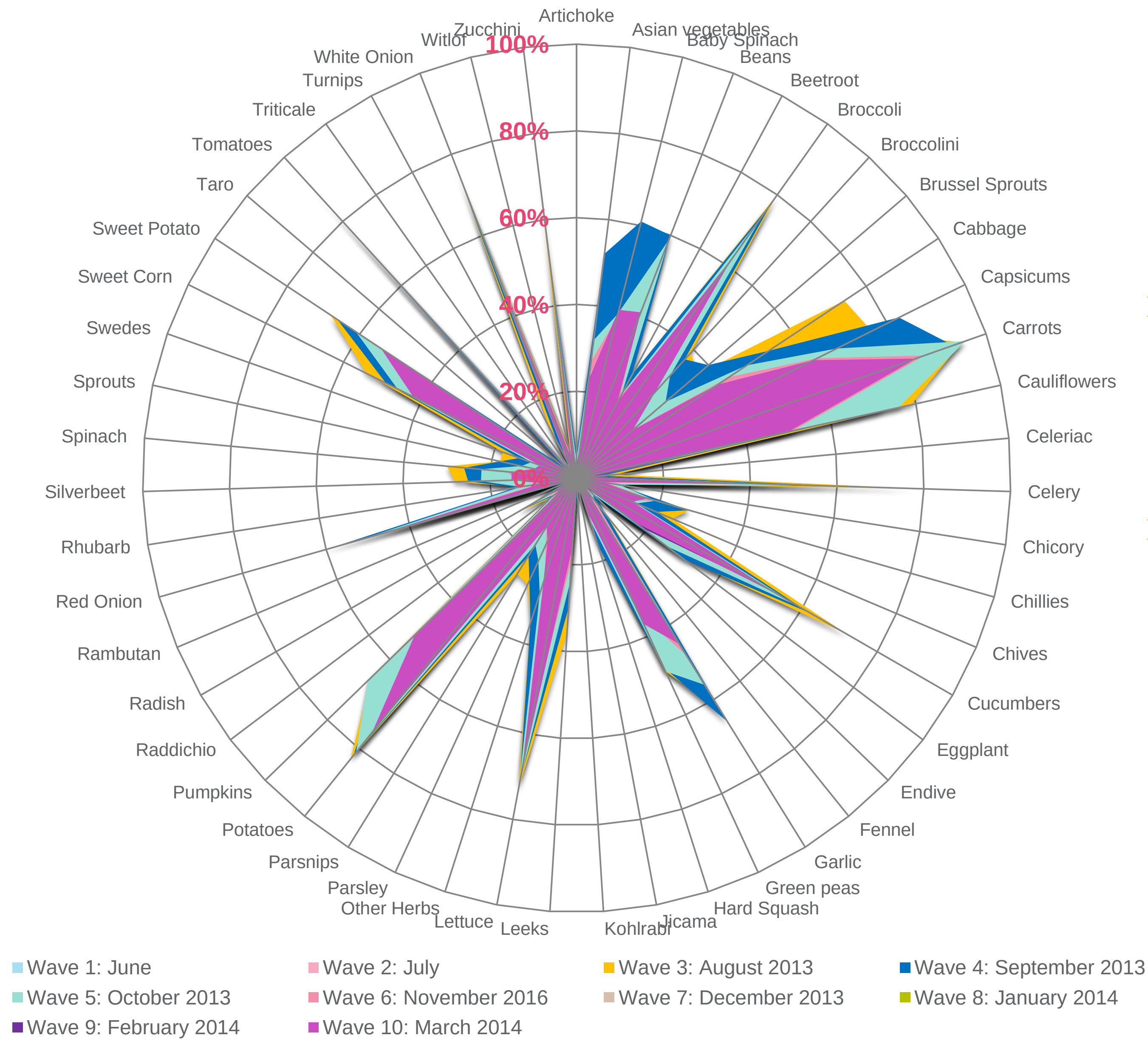
Next 12 Months

Overall there was a 2% net increase expected for the purchase of head lettuce compared to other leaf pack types.



Wave 10: Overall Vegetable Tracking

Vegetables Purchased Last Month



- The current wave, March 2014, showed a stable purchase of vegetables, consistent with Wave 9. However this was somewhat lower than earlier waves.
- Tomatoes, carrots, potatoes and onion were the most purchased vegetables this wave, which was consistent with previous months.

Sample Wave 10 N=1588
S8. Which of the following fresh vegetables have you purchased in the last month?

Category Health Explained

The following questions were asked to understand consumer sentiment about the vegetables, which can be tracked over time.

The Harvest Mean is the average of all commodities tracked thus far.

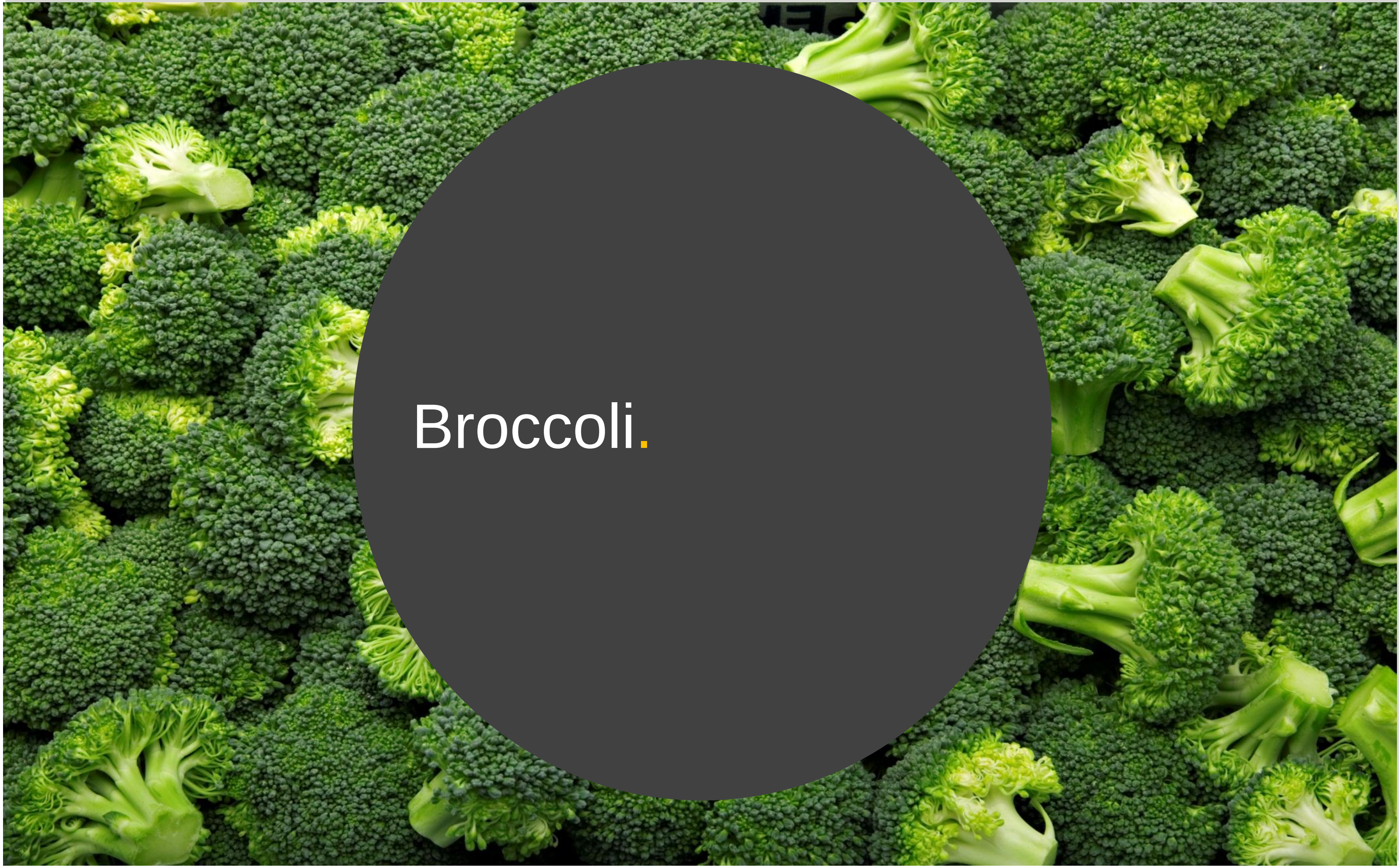
- How **important** to you is having a range of *commodity* available in the store where you usually shop?
- How **satisfied** or dissatisfied are you with the range of *commodity* currently available?
- How likely would you be to **recommend** *commodity* to your family and friends?
- How interested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

Category Health

- Overall, category health was strong for all commodities tracked this month. Consumers indicated a strong future purchase intent and all vegetables had high levels of importance.
- Green peas had a high level of interest in new varieties and strong levels of importance, both indicating that consumers expect a consistent range available from their purchase channels.
- Increased future purchase intent was lower for lettuce compared with other commodities. This may be because it is already purchased frequently and in adequate volumes for consumers‘ needs. Opportunity may exist outside of fresh produce sales to increase volume in other sectors (see Trends section).

	Broccoli	Green Peas	Lettuce	Sweet Corn	Harvest Total Mean
Importance	6.3	6.9	6.9	6.2	6.3
Satisfaction	6.7	6.6	6.9	6.5	6.6
Endorsement	6.9	7.0	6.6	6.8	6.8
Interest (New Varieties)	6.0	6.5	6.2	6.2	6.1
Future Purchase					
More	14%	13%	6%	15%	14%
Same	85%	86%	90%	83%	84%
Less	2%	1%	3%	2%	2%

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



Broccoli.

Purchase and Consumption Behaviour

Average Purchase **4.1** times per month

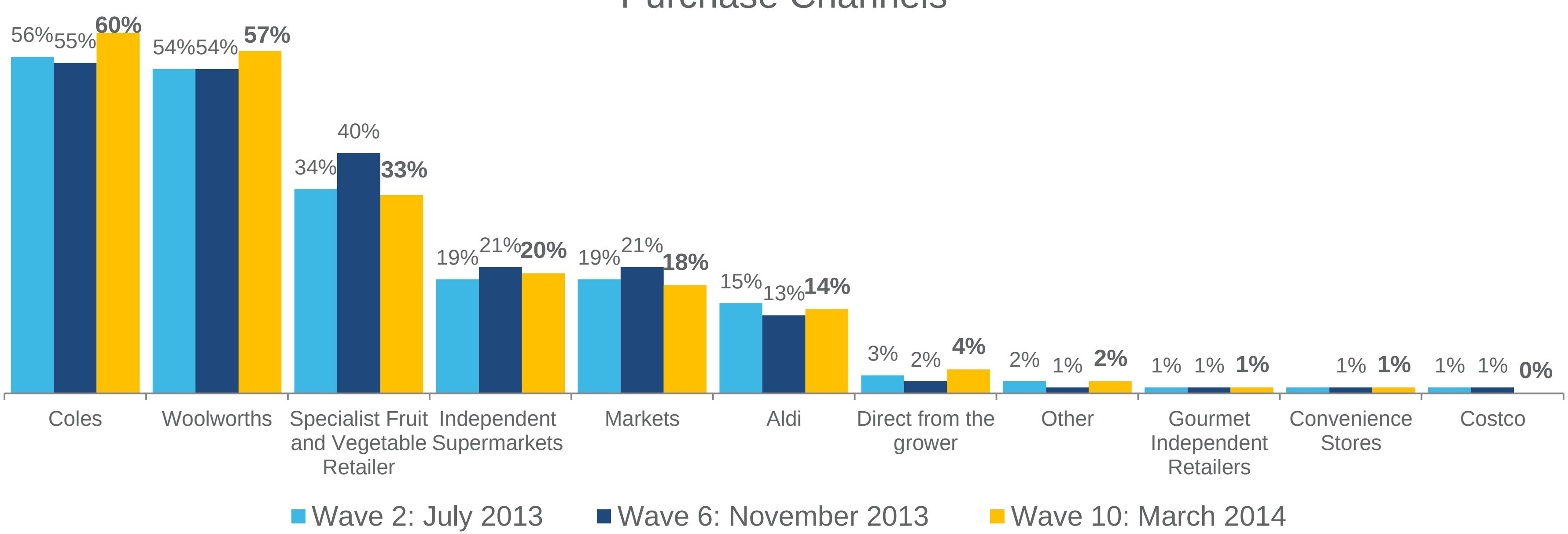
▲ 4.2 times, Wave 2
▲ 4.3 times, Wave 6

Average Consumption **9.4** times per month

▲ 10 times, Wave 2
▲ 9.9 times, Wave 6

- Purchase and consumption frequency of broccoli over the last 3 waves has remained consistent.
- The main channels for broccoli purchase continues to be mainstream retail channels (Coles & Woolworths).

Purchase Channels



Q1. On average, how often do you purchase <commodity>?
Q2. On average, how often do you consume <commodity>?
Q5. From which of the following channels do you typically purchase <commodity>?
Sample Wave 2 N=525 Wave 6 N=370, Wave 10 N=322

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

Average Spend and Price Sensitivity

Average weight of purchase

The average consumer typically purchased 700g of Broccoli in March 2014, the is consistent with previous months.

- 700g, Wave 2
- 700g, Wave 6

Recalled last spend

The average recalled last spend was $3.52 in March, slightly higher than November and July 2013.

▲ $3.55, Wave 2
▼ $3.43, Wave 6

Value for money

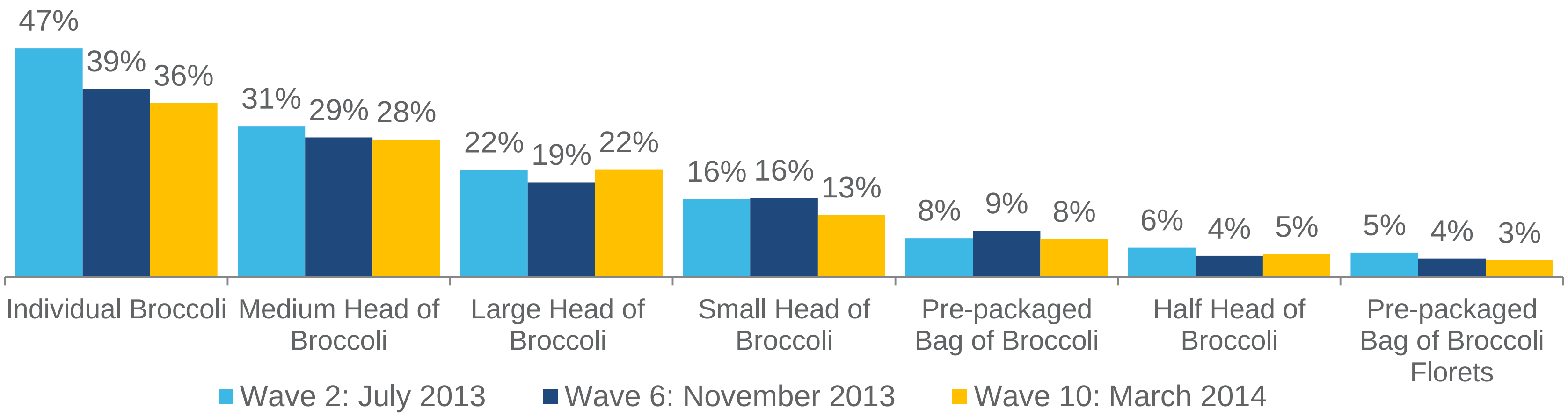
On average, consumers perceived Broccoli to be fair value (6.1/10) in March, consistent with previous waves.

▲ 6.5/10, Wave 2
▲ 6.3/10, Wave 6

Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 2 N=525 Wave 6 N=370, Wave 10 N=322

Pack Formats Purchased

- Medium and large heads of broccoli are more commonly purchased than small heads.
- Amounts purchased were consistent across all formats over the last 3 waves.

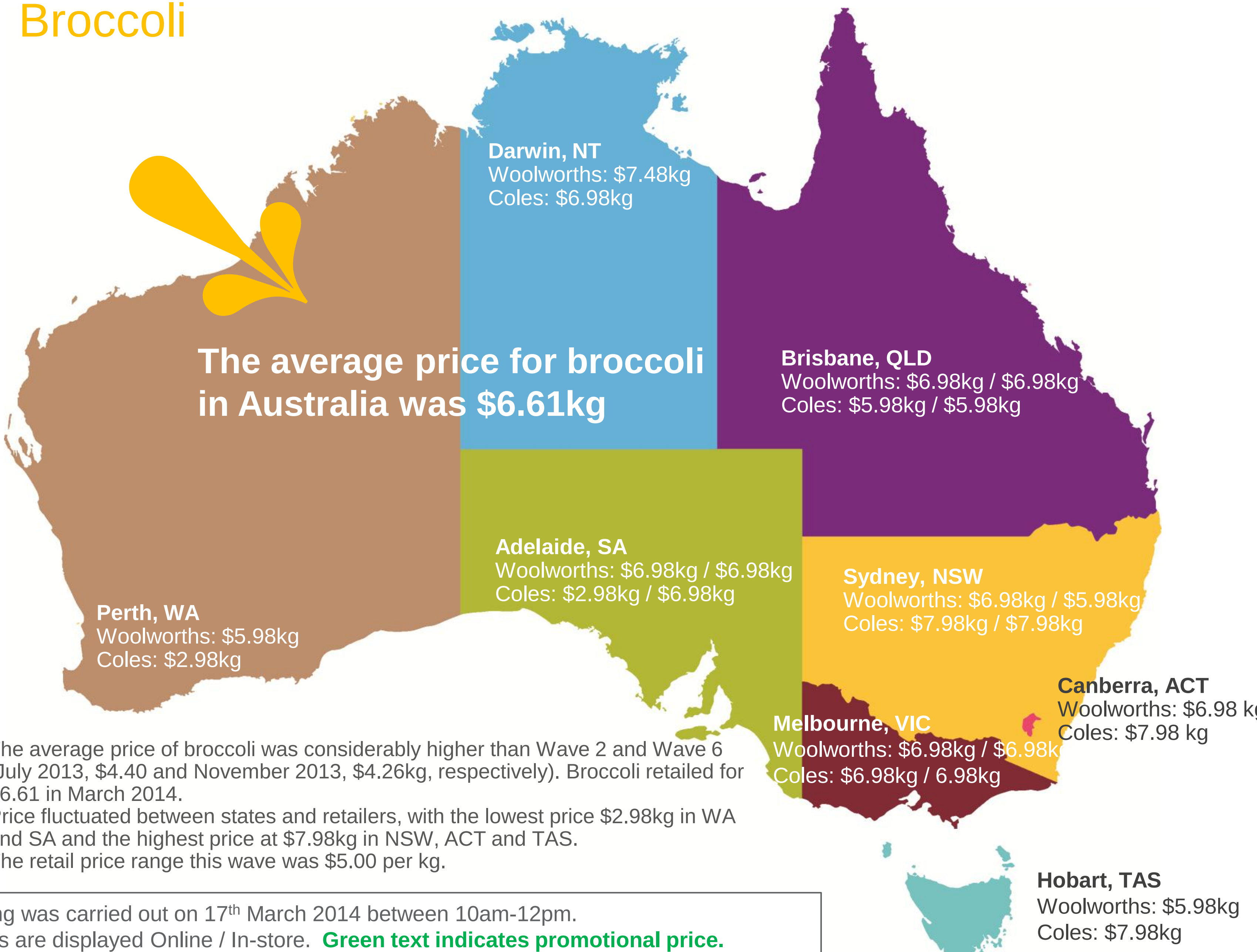


Average amount purchased per shop	Individual Broccoli	Medium Head of Broccoli	Large Head of Broccoli	Small Head of Broccoli	Pre-packaged Bag of Broccoli	Half Head of Broccoli	Pre-packaged Bag of Broccoli Florets
Wave 2: July 2013	1.7	1.6	1.8	1.7	1.3	1.5	1.2
Wave 6: November 2013	1.7	1.7	1.6	1.6	1.5	1.9	1.7
Wave 10: March 2014	1.6	1.7	1.8	1.6	1.3	1.4	1.5

Q3a. How much <commodity> does this typically equate to?
Sample Wave 2 N=525, Wave 6 N=370, Wave 10 N=322
* indicates significantly higher score @ 95% CI

Online and In-store Commodity Prices

Broccoli

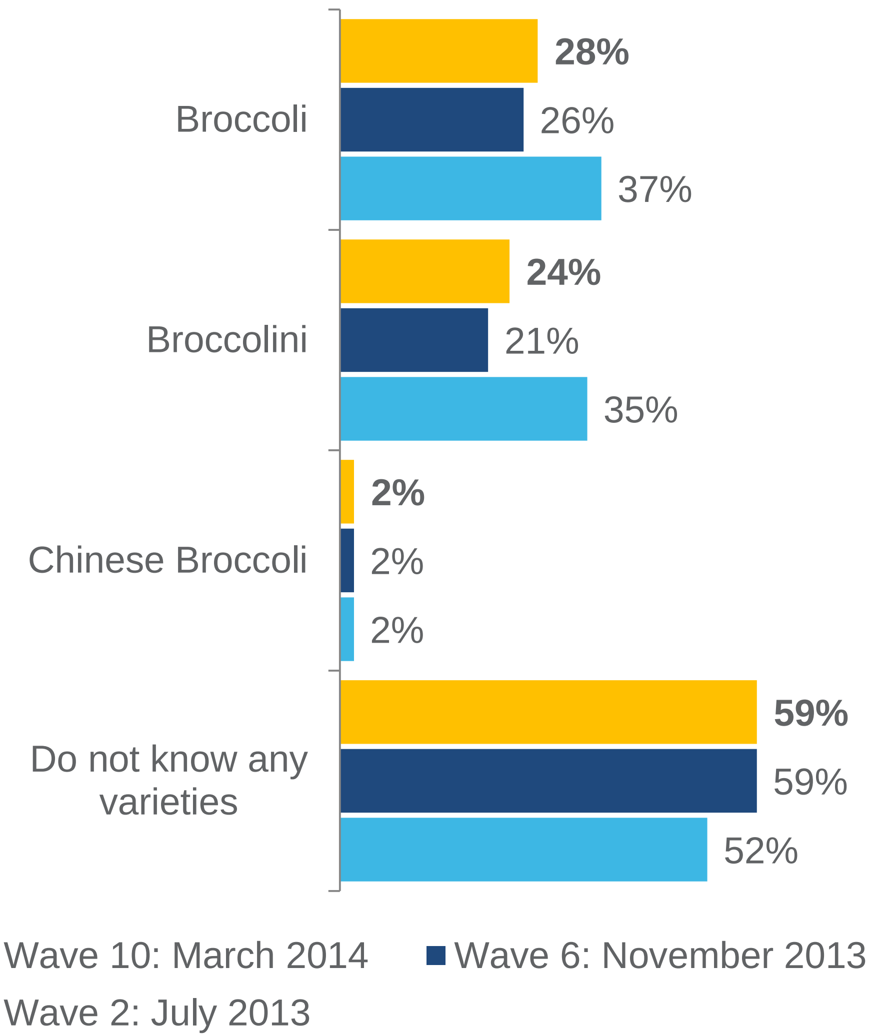


- The average price of broccoli was considerably higher than Wave 2 and Wave 6 (July 2013, $4.40 and November 2013, $4.26kg, respectively). Broccoli retailed for $6.61 in March 2014.
- Price fluctuated between states and retailers, with the lowest price $2.98kg in WA and SA and the highest price at $7.98kg in NSW, ACT and TAS.
- The retail price range this wave was $5.00 per kg.

Pricing was carried out on 17th March 2014 between 10am-12pm.
Prices are displayed Online / In-store. **Green text indicates promotional price.**

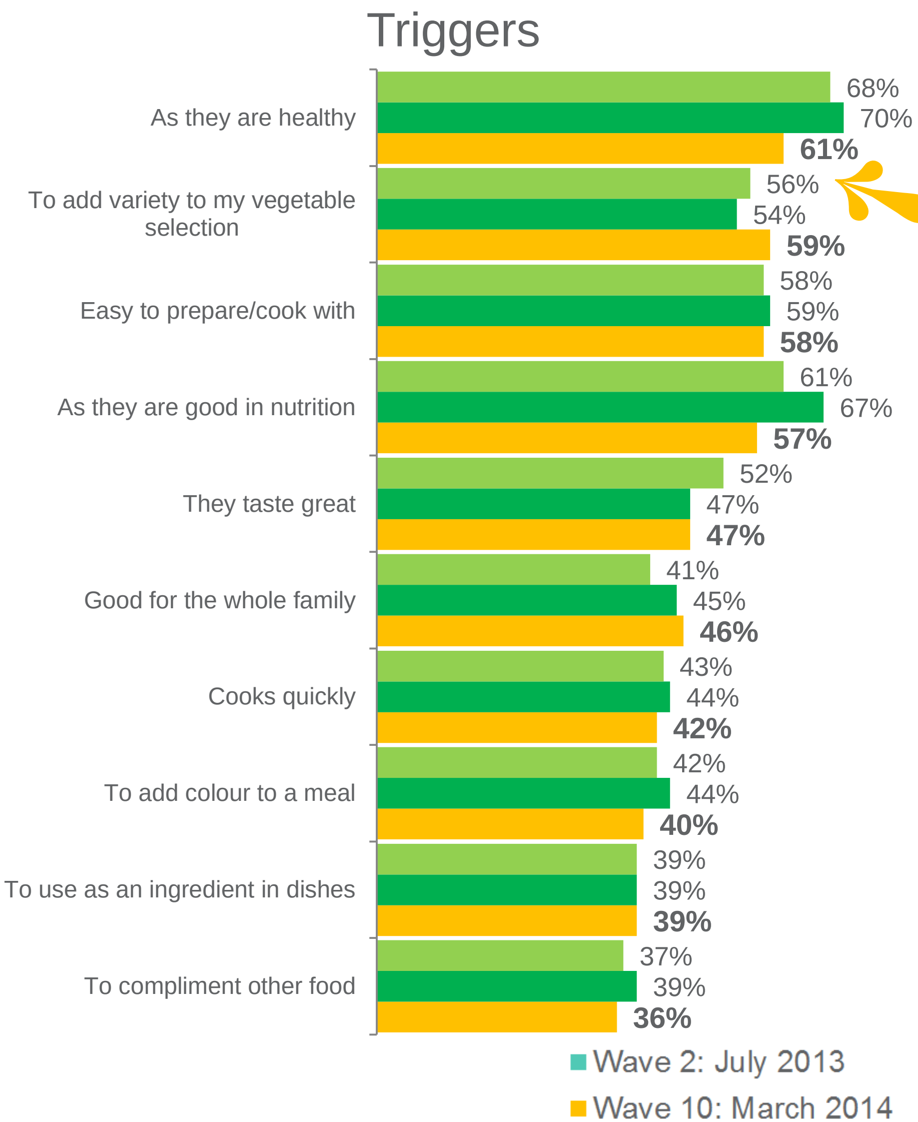
Spontaneous Commodity Type Awareness

- Awareness of different varietal/types of broccoli remained low, on trend with previous waves
- There remained a high level of misattribution for broccolini as a type of broccoli (consistent across all waves).



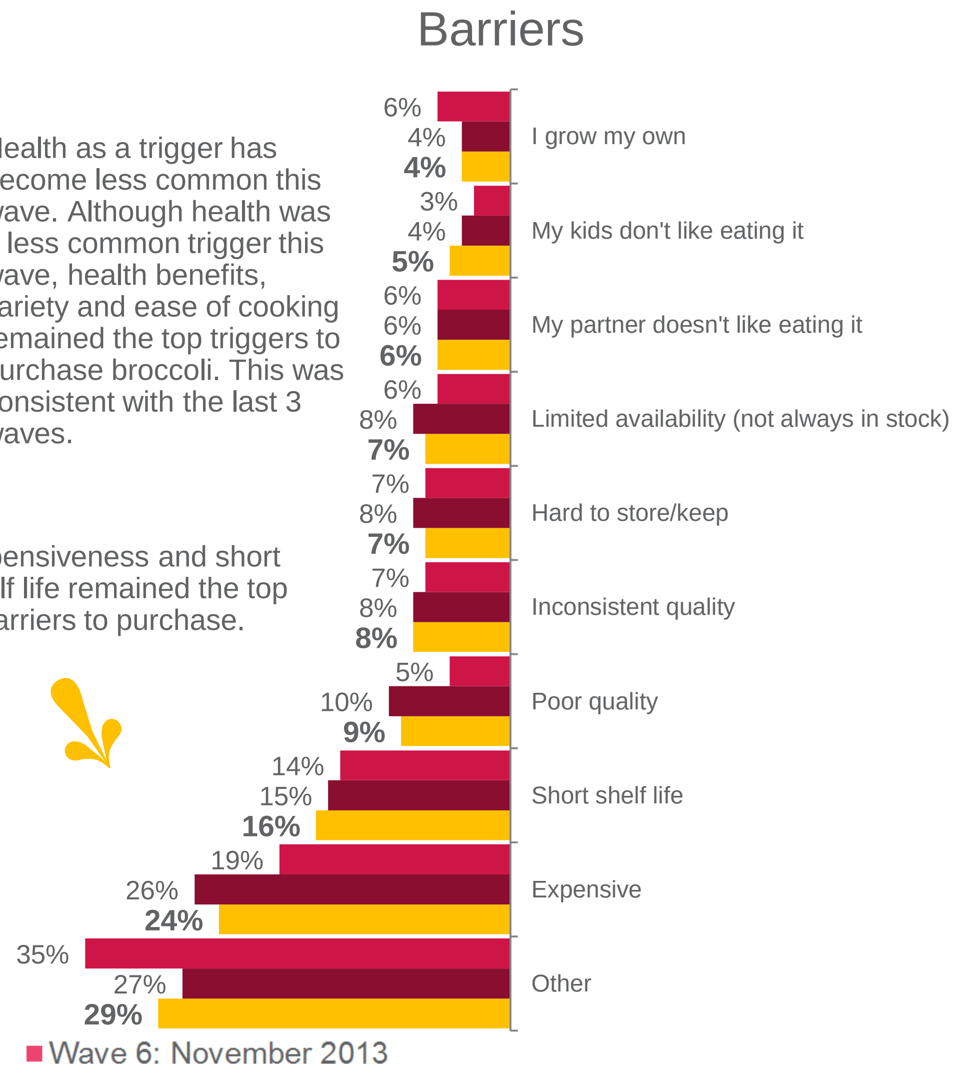
Q6a. What varieties of <commodity> are you aware of? (unprompted)
Sample Wave 2 N=525 Wave 6 N=370
* indicates significantly higher score @ 95% CI

Triggers & Barriers to Purchase



Health as a trigger has become less common this wave. Although health was a less common trigger this wave, health benefits, variety and ease of cooking remained the top triggers to purchase broccoli. This was consistent with the last 3 waves.

Expensiveness and short shelf life remained the top 2 barriers to purchase.



Sample Wave 2 N=525 Wave 6 N=370, Wave 10 N=322
* indicates significantly higher score @ 95% CI
Q7. Which of the following reasons best describes why you purchase <commodity>?
Q8. Which reason best describes why you don't buy <commodity> more often?

Cooking Cuisine & Occasions

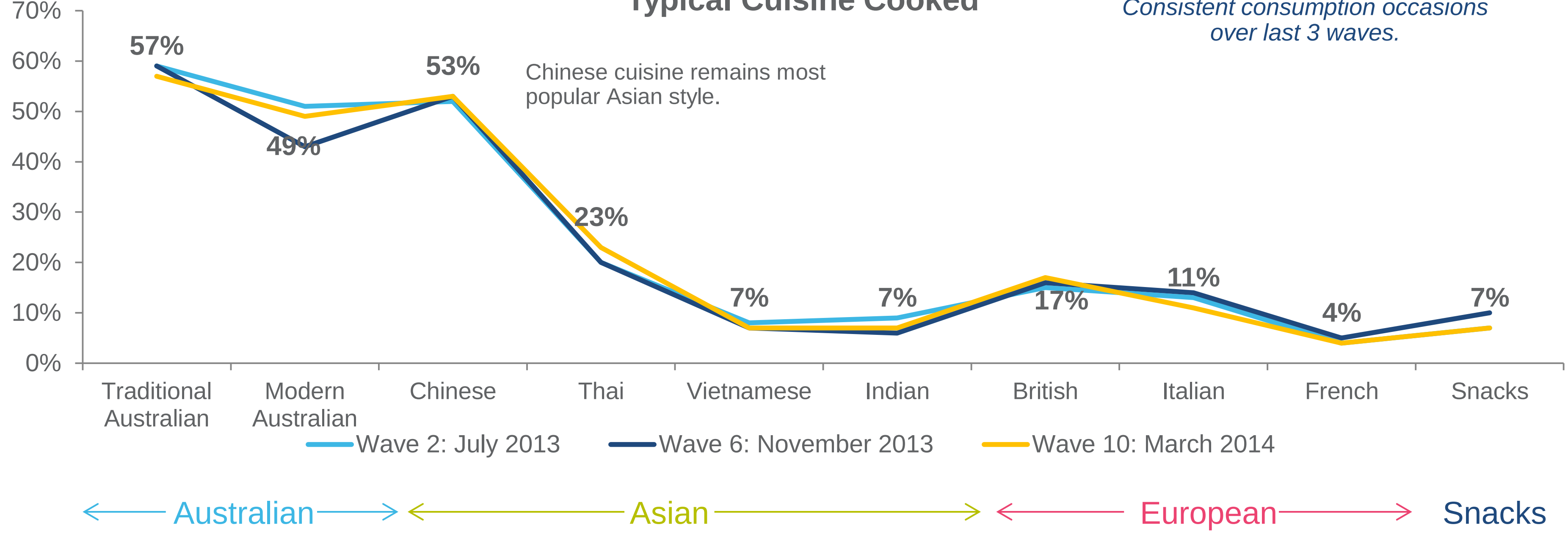
- Over a third of respondents eat broccoli every day, irrespective of the occasion.
- Asian & Australian are the main cuisines consumers (consistent for all waves) in which broccoli is used.

Wave 10 Top 5 Consumption Occasions

	Wave 10	Wave 6	Wave 2
Every-day meals	**34%**	▲	▲
Quick meals	**24%**	▲	–
New recipes	**10%**	▲	▼
Special occasions	**5%**	▼	▼
BBQ's	**3%**	▼	▼

Consistent consumption occasions over last 3 waves.

Typical Cuisine Cooked



Sample Wave 1 N=506, Wave 5 N=346, Wave 9 N=307, Wave 10 N=322
Q9. How do you typically cook French and runner beans?
Q10. What cuisines do you cook/consume that use French and runner beans?
Q10a. And when are you serving French and runner beans which of the following do you also serve together with this?
Q11. Which of the following occasions do you typically consume/use French and runner beans?
* Indicates significantly higher scores between Waves

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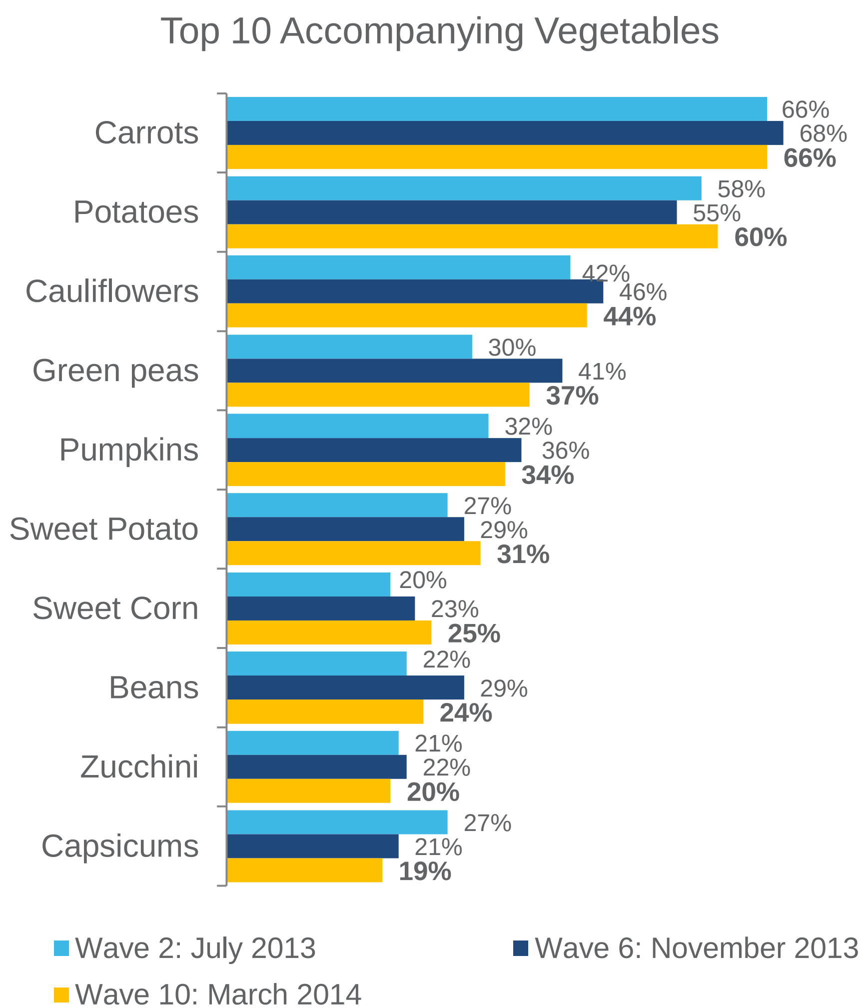
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Cooking Preferences



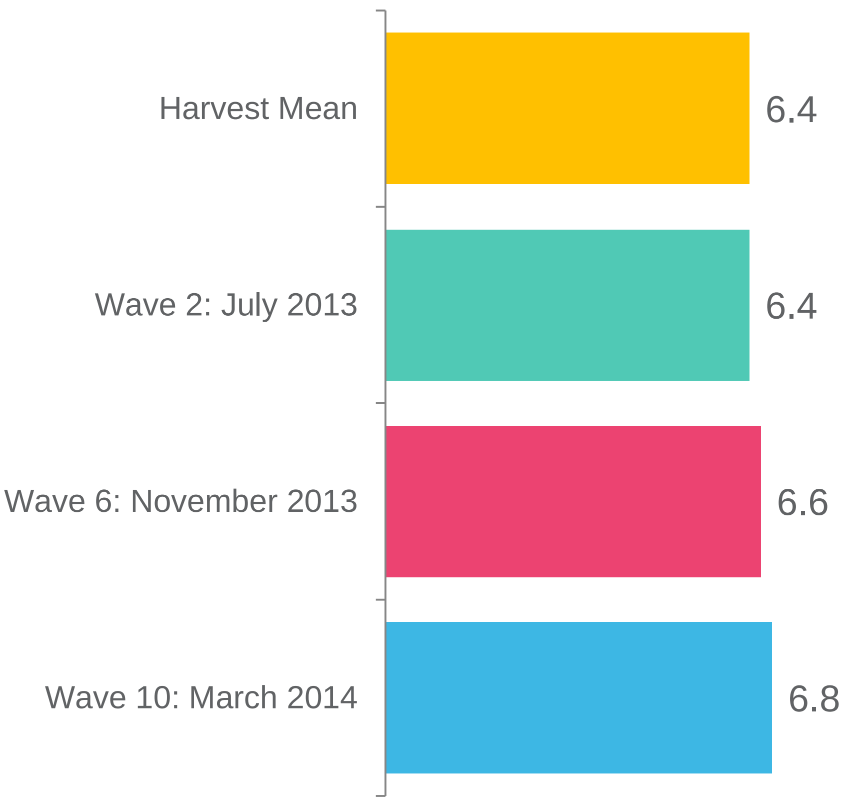
- Carrots, potatoes and cauliflower were the top three vegetables most often served with broccoli (consistent across all previous waves).
- Steaming, stir-frying, microwaving and boiling were the most common cooking methods for broccoli (remaining consistent across waves).

Top 10 Cooking Styles			
	Wave 2	Wave 6	Wave 10
Steaming	63%	61%	66%
Stir frying	50%	49%	51%
Microwave	30%	32%	27%
Boiling	35%	37%	34%
Blanche	11%	11%	11%
Raw	10%	9%	11%
Soup	11%	13%	10%
Sautéing	9%	6%	12%
Stewing (slowcooking)	8%	10%	6%
Shallow Frying	3%	3%	3%

Sample Wave 1 N=506, Wave 5 N=346, Wave 9 N=307, Wave 10: N=322
Q9. How do you typically cook French and runner beans?
Q10. What cuisines do you cook/consume that use French and runner beans?
Q10a. And when are you serving French and runner beans which of the following do you also serve together with this?
Q11. Which of the following occasions do you typically consume/use French and runner beans?
* Indicates significantly higher scores between Waves

Importance of Provenance

- The importance of provenance with Broccoli remained strong, trending to increasing importance.



Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 2 N=525 Wave 6 N=370 Wave 10 N=322

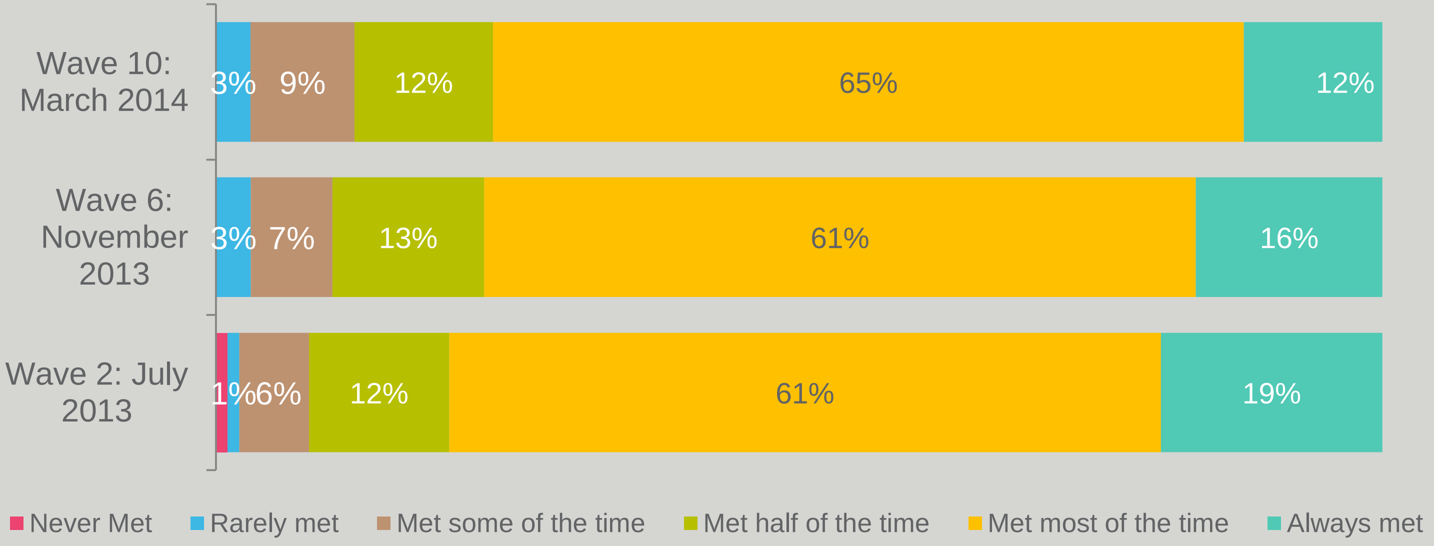
Freshness and Longevity

Expected to stay fresh for **7.1** days

▲ 7.8 days, Wave 2
▬ 7.1 days, Wave 6

- Broccoli was expected to remain fresh for one week.
- 77% of the time freshness expectations were met at least most of the time for respondents who purchased broccoli.

Expectations Met



Sample Wave 2 N=525 Wave 6 N=370 Wave 10 N=322
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> ?

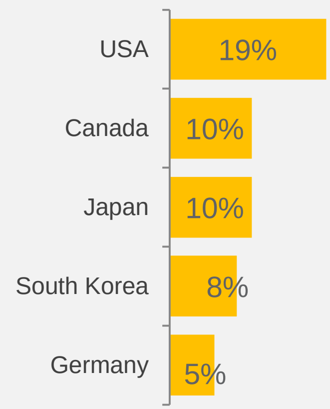
Trends: Broccoli

Broccoli Global NPDs

December-February 2013/14

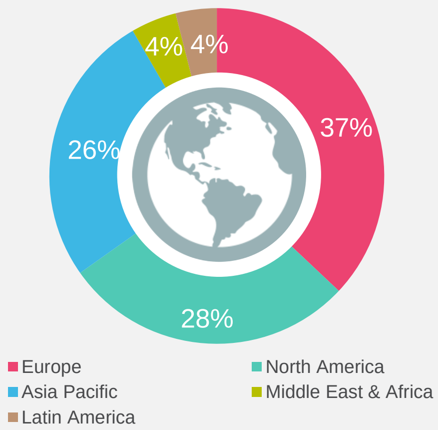
There were 227 new broccoli products launched globally over the last 3 months. These launches primarily occurred in 3 regions (Europe, North America & Asia pacific). The top categories where products were launched in were fruit and vegetables, meals and baby food.

Country

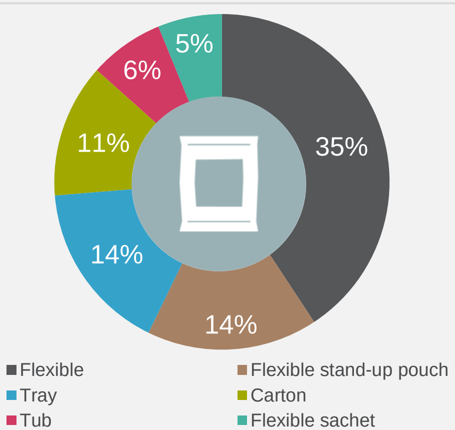


227 Global NPDs

Region



Top Pack Formats



Categories

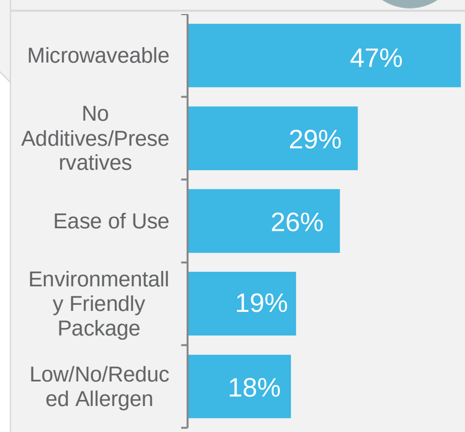
Fruit & Vegetables 26%

Meals 22%

Baby Food 15%

Soup 8%

Top Claims



Broccoli Product Launches:
Last 3 Months (November – February 2013/14)
Summary

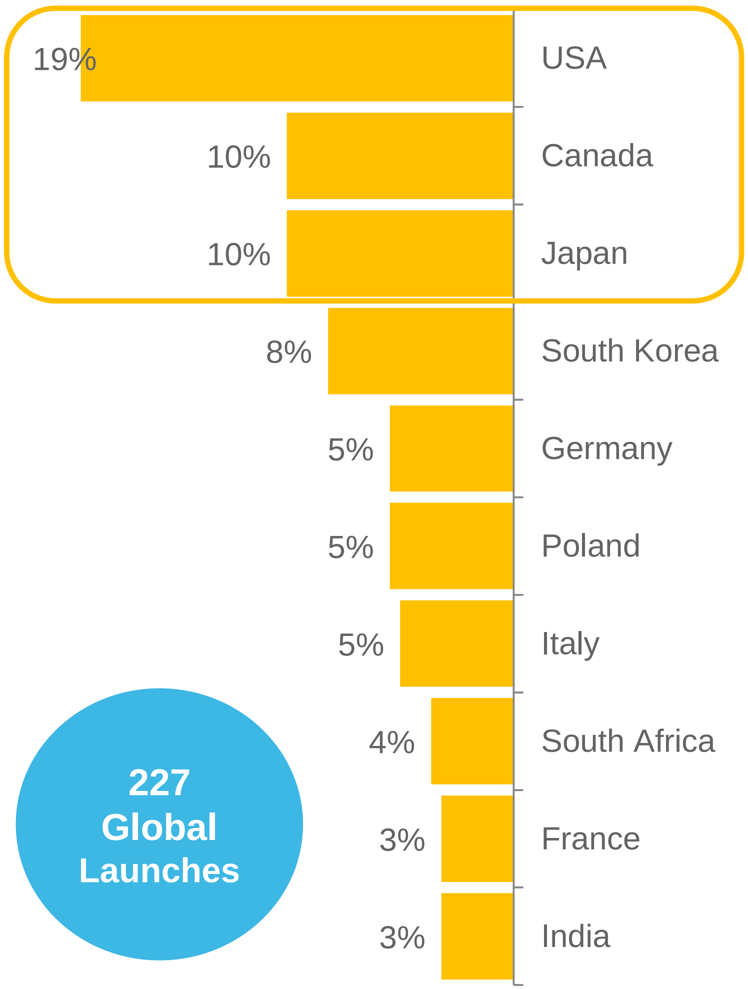
- A total of 227 products containing broccoli as an ingredient were launched globally within the last 3 months, a slight decrease from the previous tracked quarter (N=245).
- There was one product containing broccoli launched in Australia in the past 3 months, a creamy vegetable spelt (see upcoming slides for more detail).
- Europe, North America and Asia Pacific were the top regions for broccoli product launches (37%, 28% & 26% respectively).
- Flexible pack formats were the most used format for launches in the last 3 months (35%), followed by trays (14%). This is consistent with all previous waves tracked.
- The top categories for launches were fruit and vegetable goods (26%), meals (22%) and baby food (15%). These top categories were also consistent with all previous waves tracked.
- The core claims used for launches centred around convenience and health, with microwaveable being the top claim (47%) followed by no additives/preservatives (29%). Top claims that have been used have been consistent over all previous waves tracked.
- The most innovative launches found were broccoli puree for salmon meals and broccoli flavoured vegetable sticks (see upcoming slides for more detail).

Source: Mintel (2014)

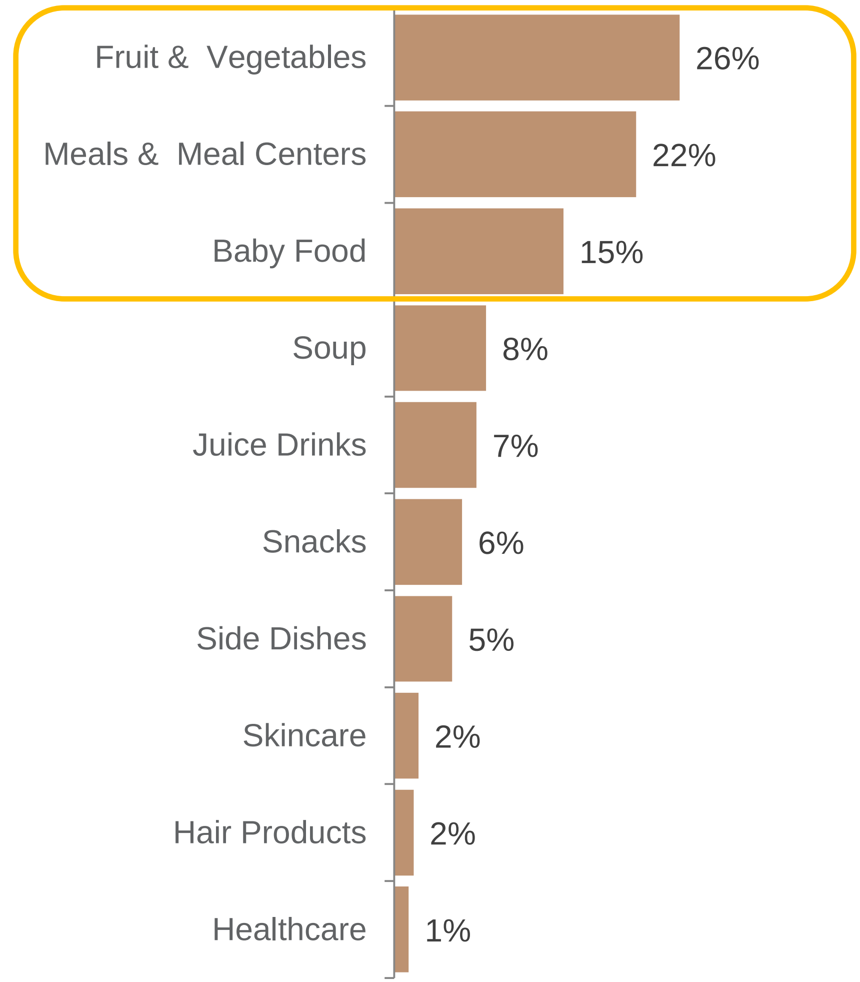
Broccoli Launches
Country & Categories

- The most active countries for launches in the last 3 months were USA, Canada and Japan.
- Fruit & Vegetables and Meals were the dominant categories for launches in the last 3 months.

Top 10 Launch Countries



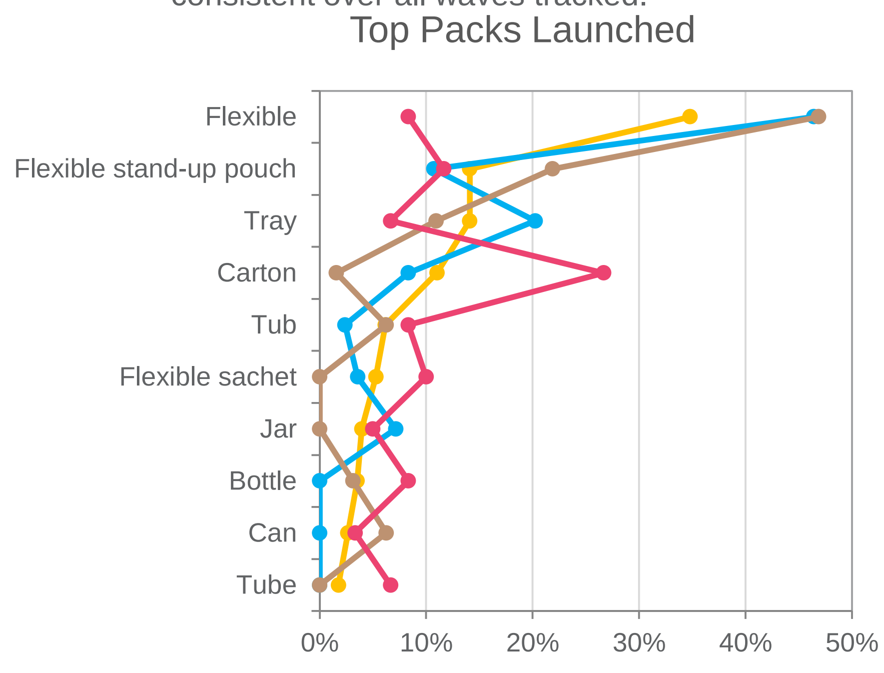
Top 10 Launch Categories

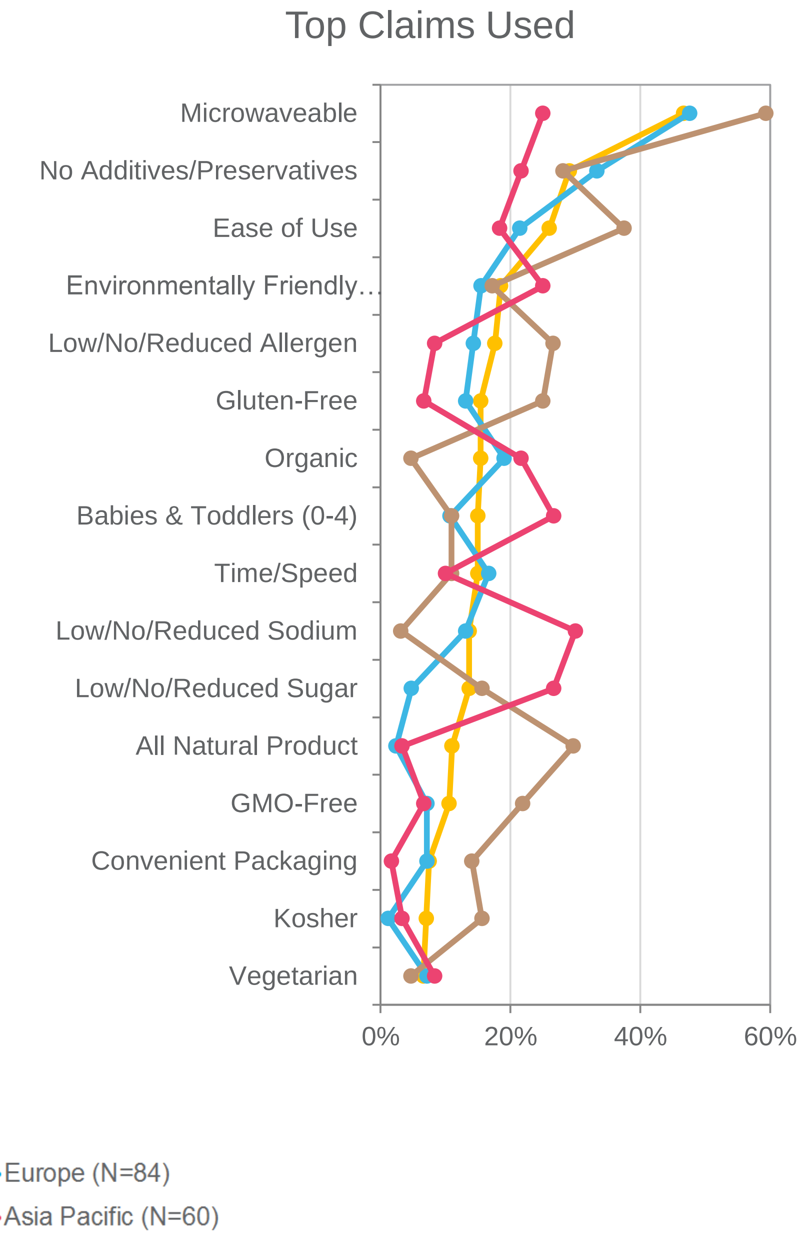


Number of Global Broccoli NPD for the L3M N=227

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. Cartons remained popular in Asia Pacific.
- These claims and pack format trends were consistent over all waves tracked.





Number of Global Broccoli NPD for the L3M N=227
Only regions with n >30 are displayed

Innovative Broccoli Launches:
L3M (November – February 2013/14)

Organic Just Handmade Food HiLo Super Greens Soup (Ireland)

Organic Just Handmade Food HiLo Super Greens Soup is formulated with nutrient dense food such as peas, spinach and broccoli. The gluten-free product is high in protein, low in fat and rich in folate and iron as well as a multitude of other healthy goodness.

Claims:
Low/No/Reduced Allergen, Gluten-Free, High Protein, Low/No/Reduced Fat, Slimming, Organic, Antioxidant, Cardiovascular (Functional)

Auchan Salmon & Broccoli Puree (France)

Auchan Saumon Purée de Brocolis (Salmon & Broccoli Puree) has been reformulated with a new recipe. This product can be microwave heated in three minutes and retails in a 290g pack which serves one.

Claims:
No Additives/Preservatives, Microwaveable

Tohato Vegix Green Vegetable Stick (Japan)

Tohato Vegix Green Vegetable Stick is made with green vegetables, fruits and GMO-free potatoes. The product retails in a 45g pack. Launched on January 6, 2014, open-priced.

Claims:
GMO-Free

Naked Green Machine Boosted 100% Juice Smoothie (USA)

Naked Green Machine Boosted 100% Juice Smoothie has been repackaged and is now available in a 40-fl. oz. recyclable pack with 4 x 10-fl. oz. recycled and recyclable bottles. This vegan smoothie is a blend of five juices with added ingredients, including apples, Rainforest Alliance Certified bananas and pineapples, kiwi, mango, spirulina, alfalfa & broccoli.

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

Source: Mintel (2014)

Innovative Broccoli Launches:
L3M (November – February 2013/14)

MarMina Santé Hummus Spread with Roasted Onions & Broccoli (Canada)

MarMina Santé Hummus Spread with Roasted Onions & Broccoli has been repackaged in a 250g pack. This all natural product is free from gluten, cholesterol, preservatives and trans fat.

Claims:
No Additives/Preservatives, All Natural Product, Low/No/Reduced Allergen, Low/No/Reduced Cholesterol, Ethical - Environmentally Friendly Package, Low/No/Reduced Fat, Slimming, Gluten-Free, Low/No/Reduced Transfat

Bulaf Chicken Broccoli Sausages (Indonesia)

Bulaf Sosis Ayam Brokoli (Chicken Broccoli Sausages) are ready to cook and halal certified. The products retail in a 300g vacuum pack.

Claims:
Halal, Ease of Use

Love Child Organics Apple, Spinach, Kiwi and Broccoli Organic Purée (Canada)

Suitable for babies from six months old onwards. The product contains acerola, making it a an excellent source of vitamin C and is nutritionally focused. It is made without unnecessary ingredients, contains no added sugar, salt, fillers, nuts, gluten, dairy and nothing artificial.

Claims:
No Additives/Preservatives, All Natural Product, Low/No/Reduced Allergen, Gluten-Free, Kosher, Low/No/Reduced Sugar, Organic, Low/No/Reduced Sodium, Babies & Toddlers (0-4), Children (5-12)

Iglo Gemüse-Reis Pyramide Grüne Mischung (Rice with Green Vegetable Mix) (Austria)

Iglo Gemüse-Reis Pyramide Grüne Mischung (Rice with Green Vegetable Mix) is said to be a delicious mix of crunchy vegetables and long grain rice, refined with aromatic herbs and spices. It is free from flavour enhancers, artificial colourants, flavourings, is suitable for an ovo-lacto-vegetarian diet and can be heated in just five minutes in the microwave.

Claims:
No Additives/Preservatives, Vegetarian, Ethical - Environmentally Friendly Product, Time/Speed, Microwaveable

Source: Mintel (2014)

Innovative Broccoli Launches:
L3M (November – February 2013/14)

Organic Veggie Snacks with Carrot, Beetroot & Broccoli Flavour (Poland)

Said to be developed from scratch to be baked and not fried, and are baked at low temperatures to maintain great flavours. The vegetarian product contains 60% less fat than regular potato chips.

Claims:
Low/No/Reduced Allergen, Low/No/Reduced Cholesterol, GMO-Free, Gluten-Free, Low/No/Reduced Fat, Organic, Low/No/Reduced Transfat, Vegetarian

Happy Munchies Baked Organic Cheese & Grain Snack (Vietnam)

Happy Munchies Banh An Dam Vi Pho Mai Bong Cai (Baked Organic Cheese & Grain Snack) has been relaunched with a new formulation and a newly designed pack featuring a new brand name. This USDA organic and kosher certified product contains broccoli, kale, and cheddar cheese, 32mg choline per serving for brain development, and is made with wholegrain corn.

Claims:
No Additives/Preservatives, GMO-Free, Brain & Nervous System (Functional), Ethical - Environmentally Friendly Package, Other (Functional), Kosher, Ethical - Environmentally Friendly Product, Ethical - Human, Organic, Social Media, Babies & Toddlers (0-4), Wholegrain

Moulin des Peupliers Forester Risotto (France)

Moulin des Peupliers Risotto Forestier (Forester Risotto) is made with 185g of fresh vegetables. This organic and Ecocert certified product is free from added salt, and can be used as a main dish, or as an accompaniment. It retails in a 220g jar, that serves three to four, and featuring cooking instructions.

Claims:
Organic, Low/No/Reduced Sodium, Ethical - Environmentally Friendly Product

Rangrang Organic Spinach and Broccoli Soft Snack (South Korea)

Rangrang Organic Spinach and Broccoli Soft Snack is now available. This traditional style product does not contain colourings, flavourings, bulking agents or oils. It is suitable for stage-2 babies in the pre-teething phase, and retails in a 30g pack.

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

Source: Mintel (2014)

Australian Broccoli Launches:
L3M (November – February 2013/14)

Ainsley Harriott World Kitchen Creamy Vegetable Spelt (Australia)

Ainsley Harriott World Kitchen Creamy Vegetable Spelt is said to be a tasty, versatile dish using the ancient spelt grain and traditional vegetables with a little creamy sauce to create a hearty accompaniment. This vegetarian product is free from artificial colours and preservatives, and contains less than 2% fat.

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

colmar brunton.

Source: Mintel (2014)

Green Peas.

Purchase and Consumption Behaviour

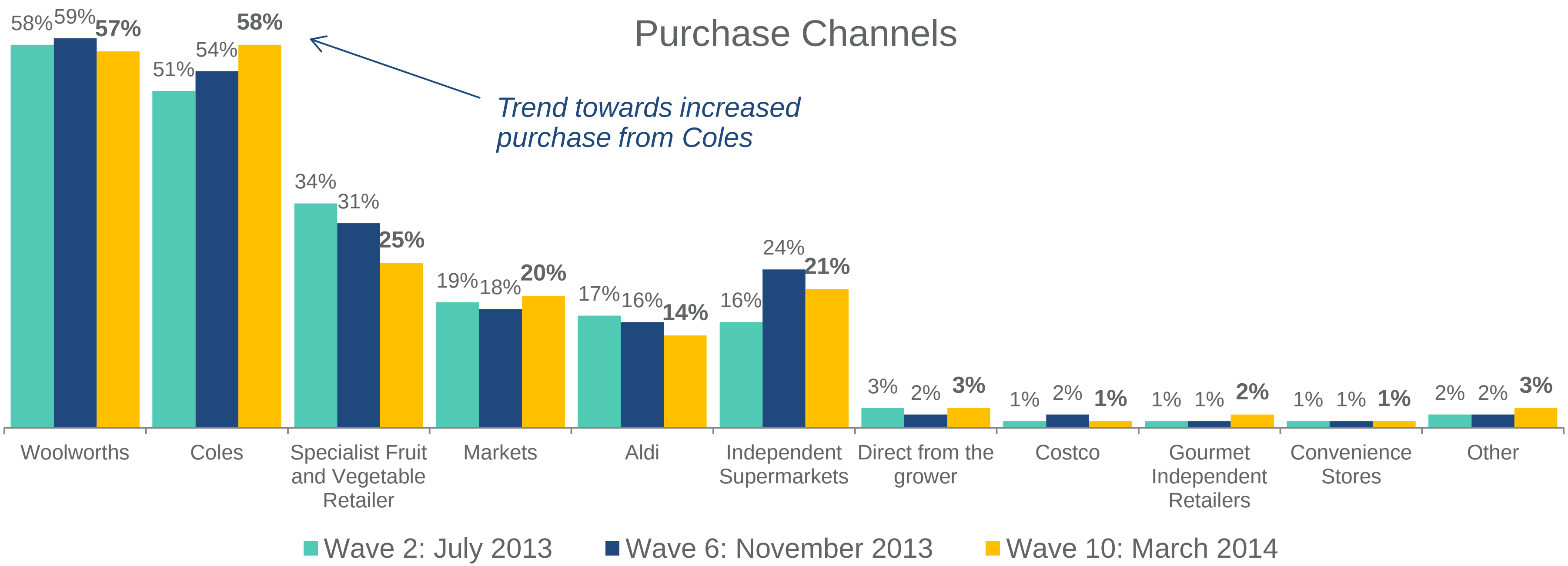
Average Purchase **3.9** times per month

▼ 3.6 times, Wave 2
▲ 4.0 times, Wave 6

Average Consumption **10.2** times per month

▼ 9.7 times, Wave 2
▲ 10.5 times, Wave 6

- Purchase and consumption habits were on trend with previous waves. On average Peas were consumed every three days.
- Mainstream retailers were the main purchase channels for green peas. There was a trend towards decreased purchase from specialist 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 Wave 2 N=503, Wave 6 N=339 and Wave 10 N=311

colmar brunton.

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

Average Spend and Price Sensitivity

Average weight of purchase

The typical consumer purchased **800g** of green peas, which was on trend with November purchase habits.

▼ 700g, Wave 2
— 800g, Wave 6

Recalled last spend

Recalled last spend on green pea purchase was **$4.45.** Although not significant, there is a trend towards an increase on last spend.

▼ $3.94, Wave 2
▼ $4.35, Wave 6

Value for money

Consumers' perceived value for money was relatively fair **(6.2/10)**, consistent with previous waves.

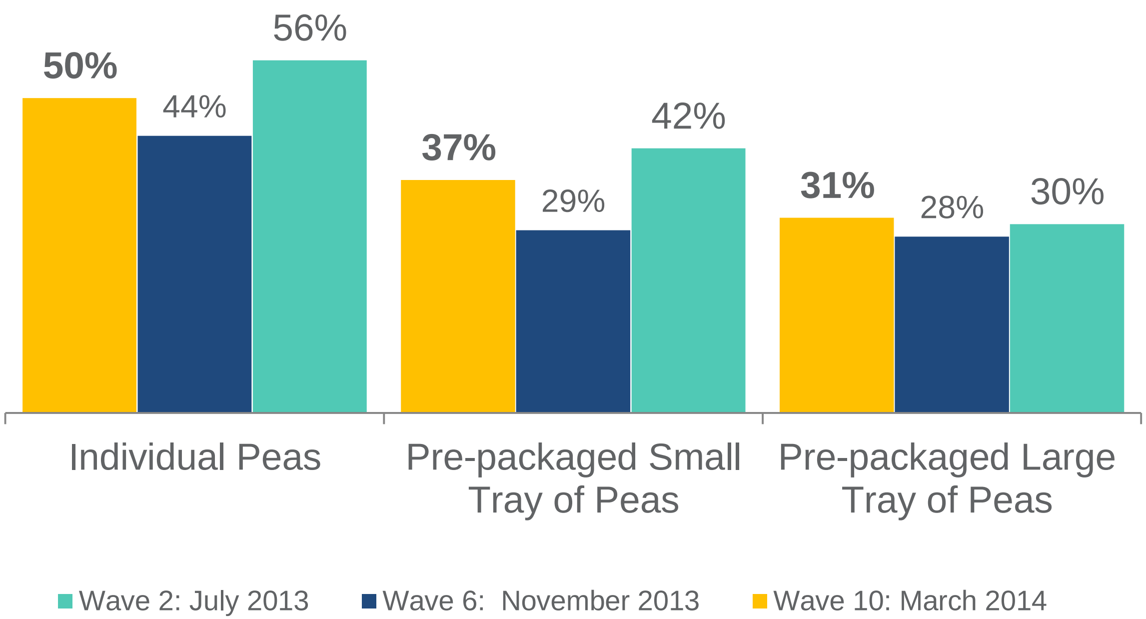
▲ 6.4/10, Wave 2
▲ 6.3/10, Wave 6

Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? 0-10 scale
Sample Wave 2 N=503, Wave 6 N=339 and Wave 10 N=311

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

Pack Formats Purchased

- Individual peas were the most common format purchased, trays were also purchased frequently. The pack format purchased may be dependent on availability of that format, with variation between waves.
- Number of formats purchased were on trend between waves.

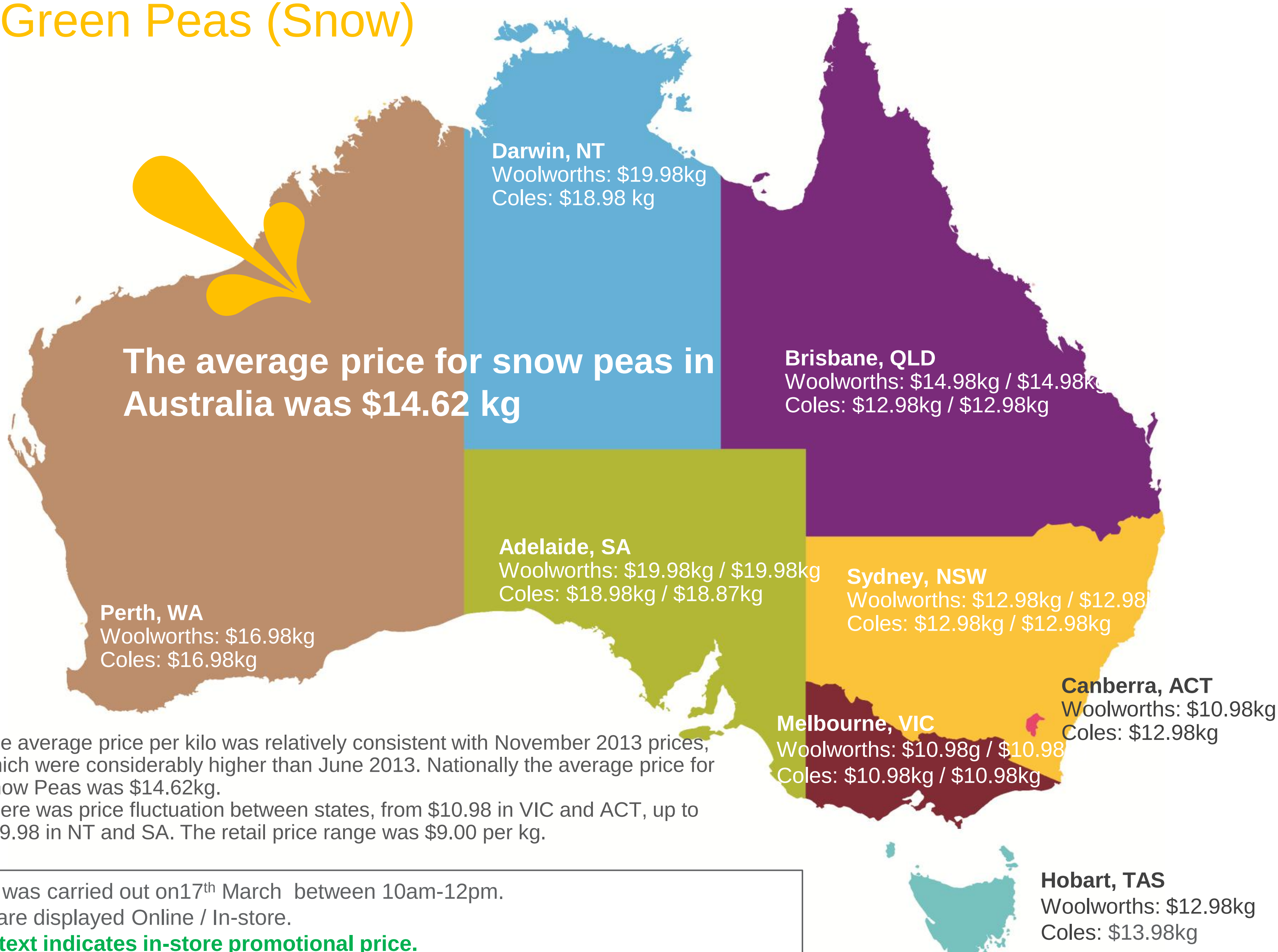


Average Amount Purchased	Pre-packaged Small Tray	Pre-packaged Large Tray
Wave 2: July 2013	1.3	1.4
Wave 6: November 2013	1.5	1.5
Wave 10: March 2010	1.4	1.3

Q3a. How much <commodity> does this typically equate to?
Sample Wave 2 N=503, Wave 6 N=339 and Wave 10 N=311

Online and In-store Commodity Prices

Green Peas (Snow)

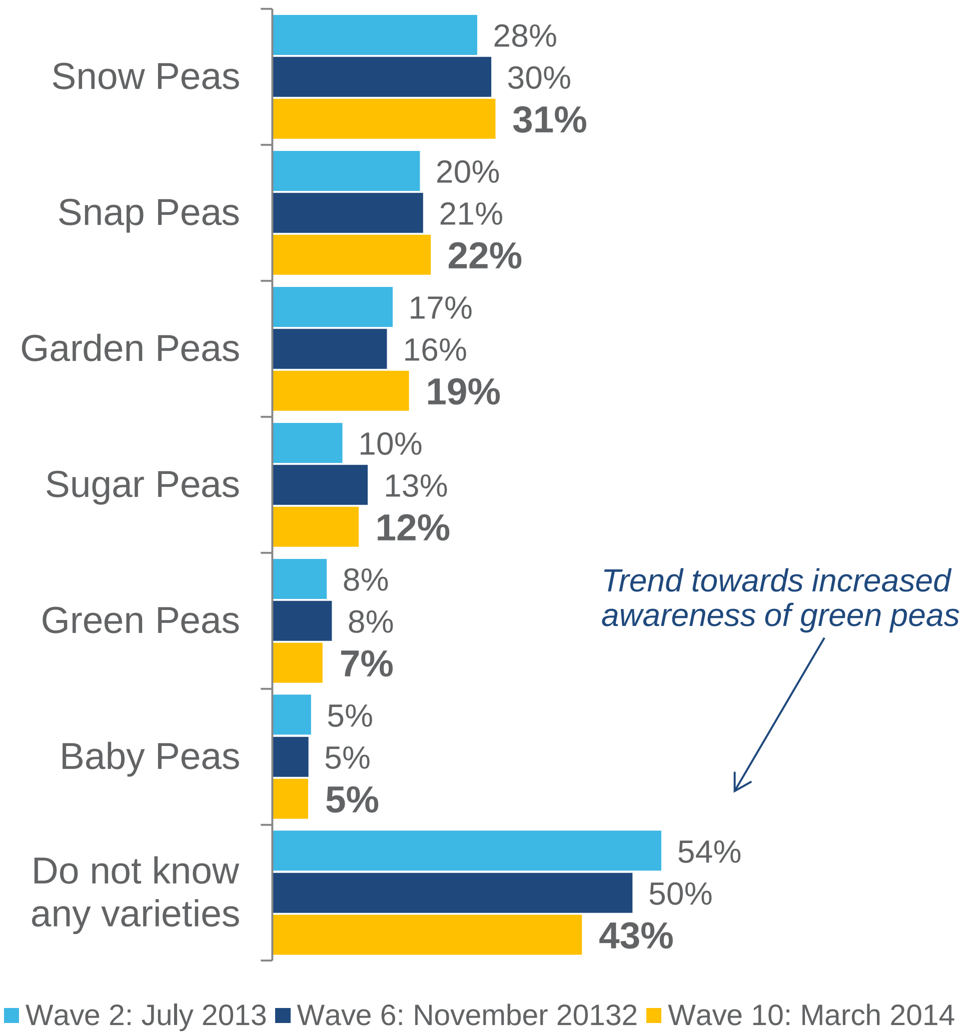


- The average price per kilo was relatively consistent with November 2013 prices, which were considerably higher than June 2013. Nationally the average price for Snow Peas was $14.62kg.
- There was price fluctuation between states, from $10.98 in VIC and ACT, up to $19.98 in NT and SA. The retail price range was $9.00 per kg.

Pricing was carried out on17th March between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates in-store promotional price.

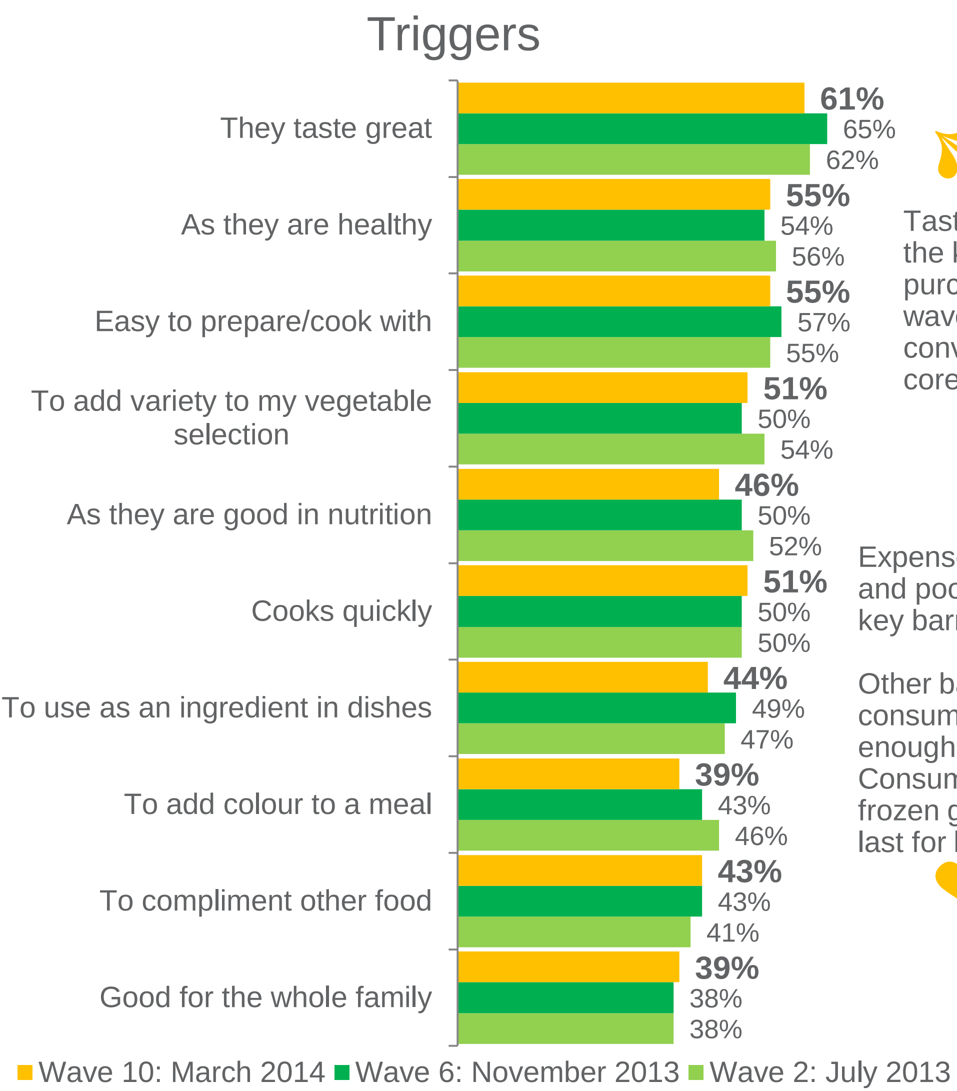
Spontaneous Commodity Type Awareness

- Awareness of types remained consistent with previous waves, with Snow Peas and Snap Peas the most commonly recalled varieties. However, there was an overall trend towards increased awareness of most types of peas.
- There was still a large proportion of consumers who were unable to recall a type of green pea.



Sample Wave 2 N=503, Wave 6 N=339 and Wave 10 N=311
Q6a. What types/varieties of <commodity> are you aware of? (unprompted)

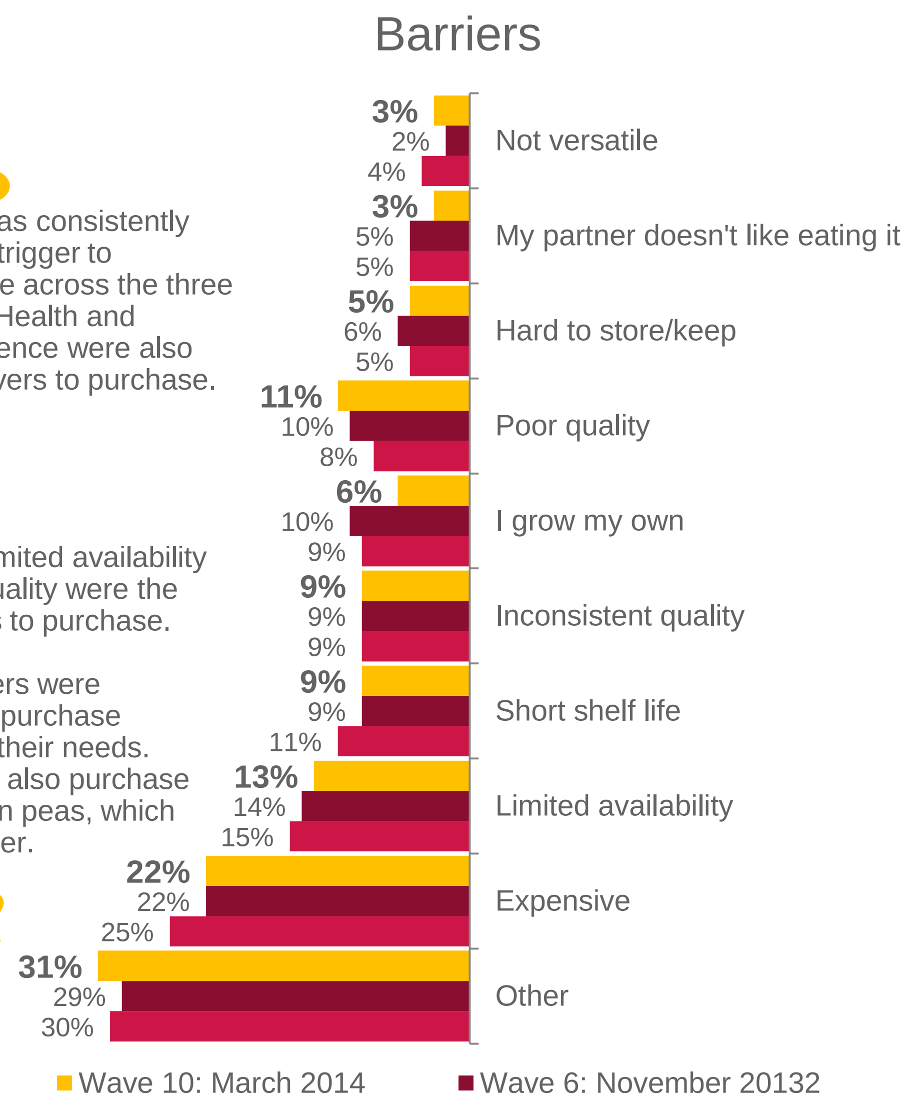
Triggers and Barriers to Purchase



Taste was consistently the key trigger to purchase across the three waves. Health and convenience were also core drivers to purchase.

Expense, limited availability and poor quality were the key barriers to purchase.

Other barriers were consumers purchase enough for their needs. Consumers also purchase frozen green peas, which last for longer.



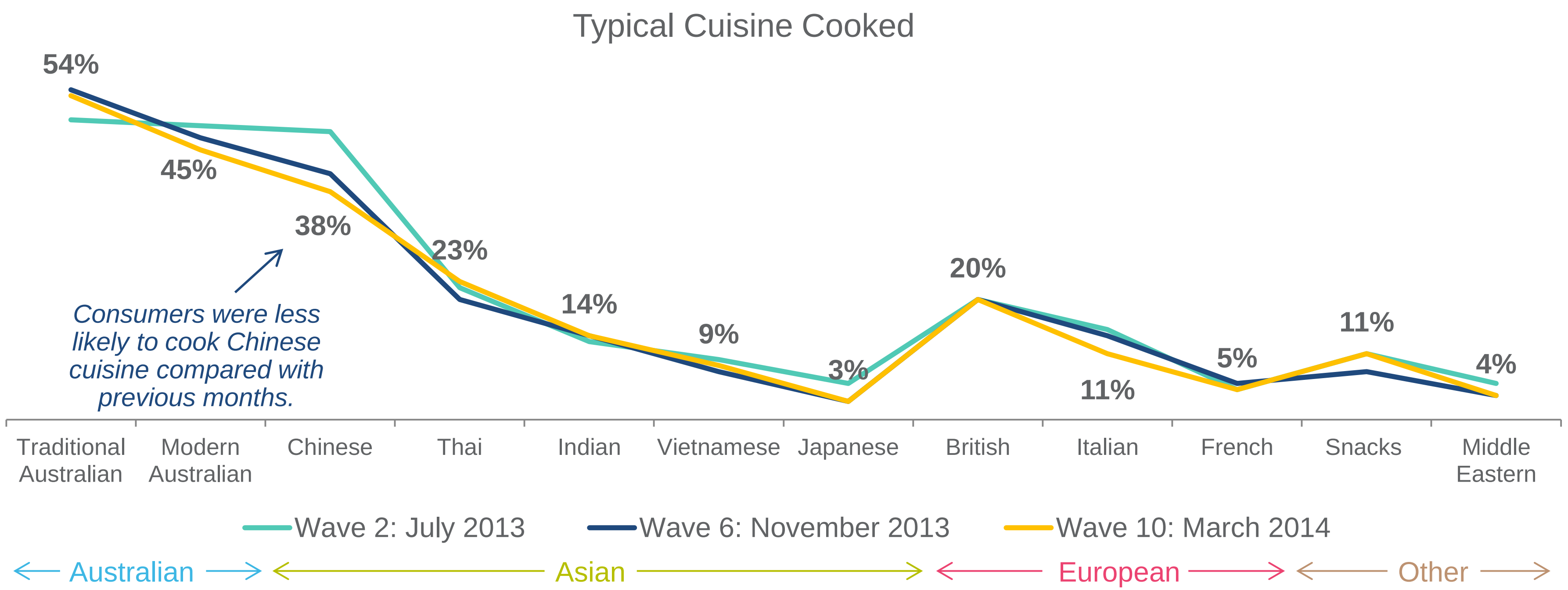
Sample Wave 2 N=503, Wave 6 N=339 and Wave 10 N=311
Q7. Which of the following reasons best describes why you purchase <commodity> ?
Q8. Which reason best describes why you don’t buy <commodity> more often?

Cooking Cuisines and Occasions

- Green peas were typically cooked in Australian cuisine, both traditional and modern.
- Cuisine repertoire was relatively consistent with previous waves, however there was a decrease in Chinese cuisine.
- Dinner remained the main consumption occasion.

Wave 10 Top 5 Consumption Occasions

Weekday dinner	**61%**	▲ Wave 2	▲ Wave 6
Weekend dinner	**40%**	▲ Wave 2	▲ Wave 6
Family meals	**41%**	▼ Wave 2	▼ Wave 6
Quick meals	**32%**	▲ Wave 2	▲ Wave 6
Every-day meals	**30%**	▼ Wave 2	▲ Wave 6

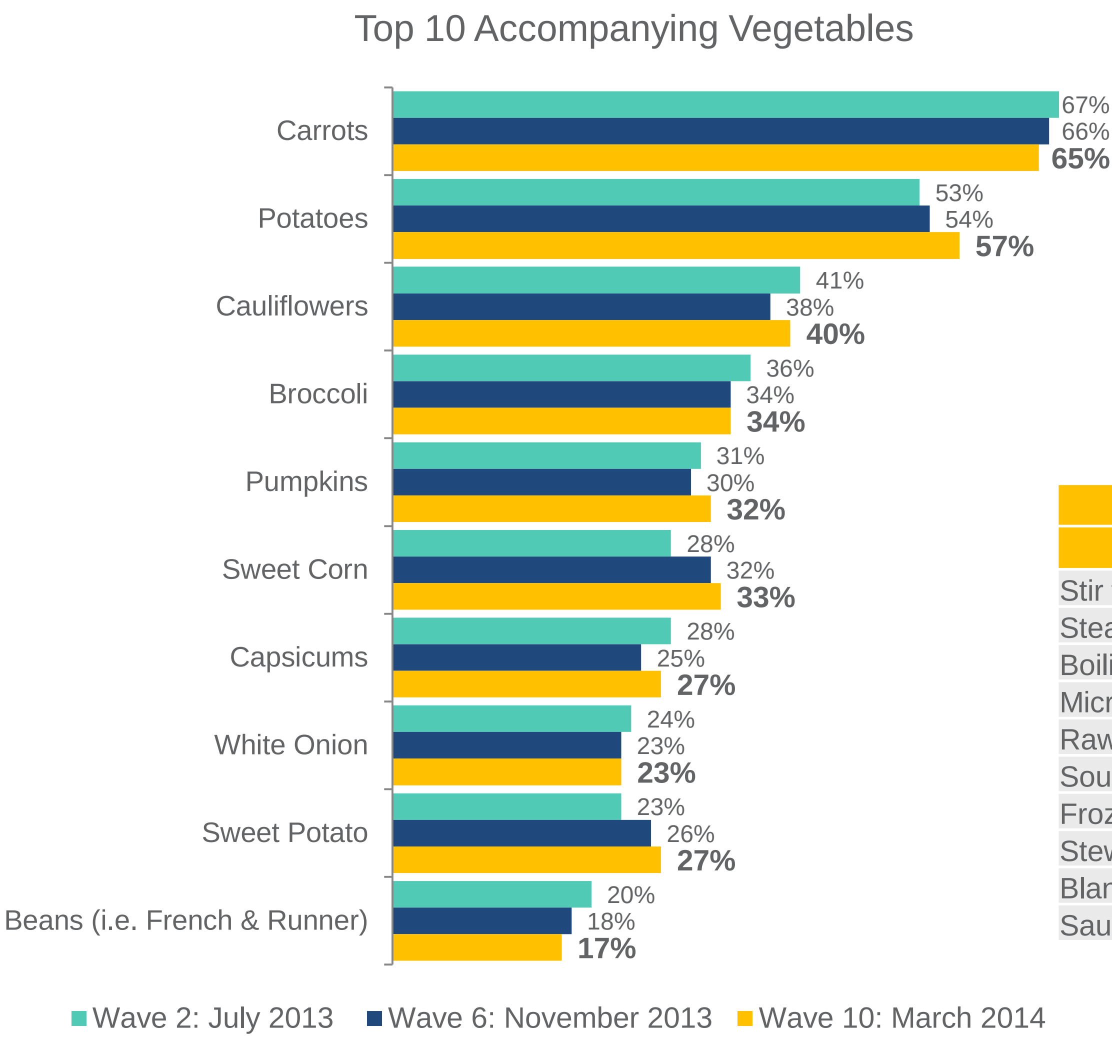


Sample Wave 2 N=503, Wave 6 N=339 and Wave 10 N=311
Q10. What cuisines do you cook/consume that use <commodity> ?
Q11. Which of the following occasions do you typically consume/use <commodity> ?

colmar brunton.

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

Cooking Preferences



- Steaming and stir-frying were the main cooking styles, this was relatively consistent with previous waves.
- Consumers served green peas with carrots, potatoes and cauliflowers.

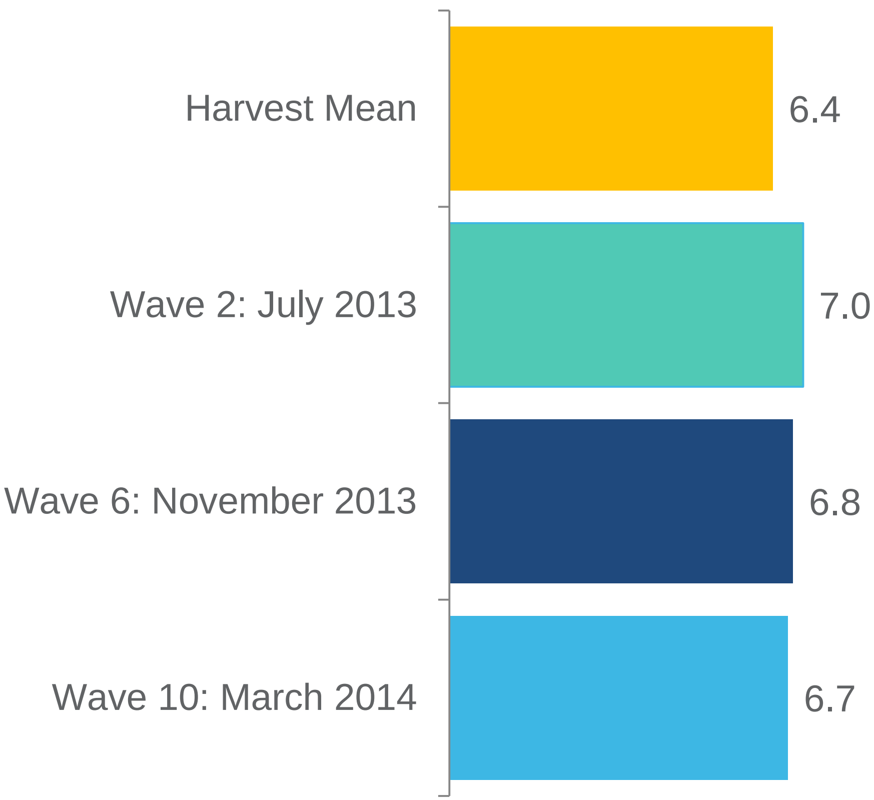
Top 10 Cooking Styles

	Wave 2	Wave 6	Wave 10
Stir frying	49%	46%	41%
Steaming	47%	44%	50%
Boiling	44%	43%	37%
Microwave	28%	32%	28%
Raw	24%	26%	23%
Soup	17%	17%	13%
Frozen	12%	16%	13%
Stewing	12%	12%	13%
Blanche	11%	11%	12%
Sautéing	6%	6%	9%

Sample Wave 2 N=503, Wave 6 N=339 and Wave 10 N=311
Q9. How do you typically cook <commodity> ?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?

Importance of Provenance

- Over the three waves there was a trend towards a decreased importance of provenance. However, this remained higher than the Harvest mean.



AUSTRALIAN MADE

Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 2 N=503, Wave 6 N=339 and Wave 10 N=311

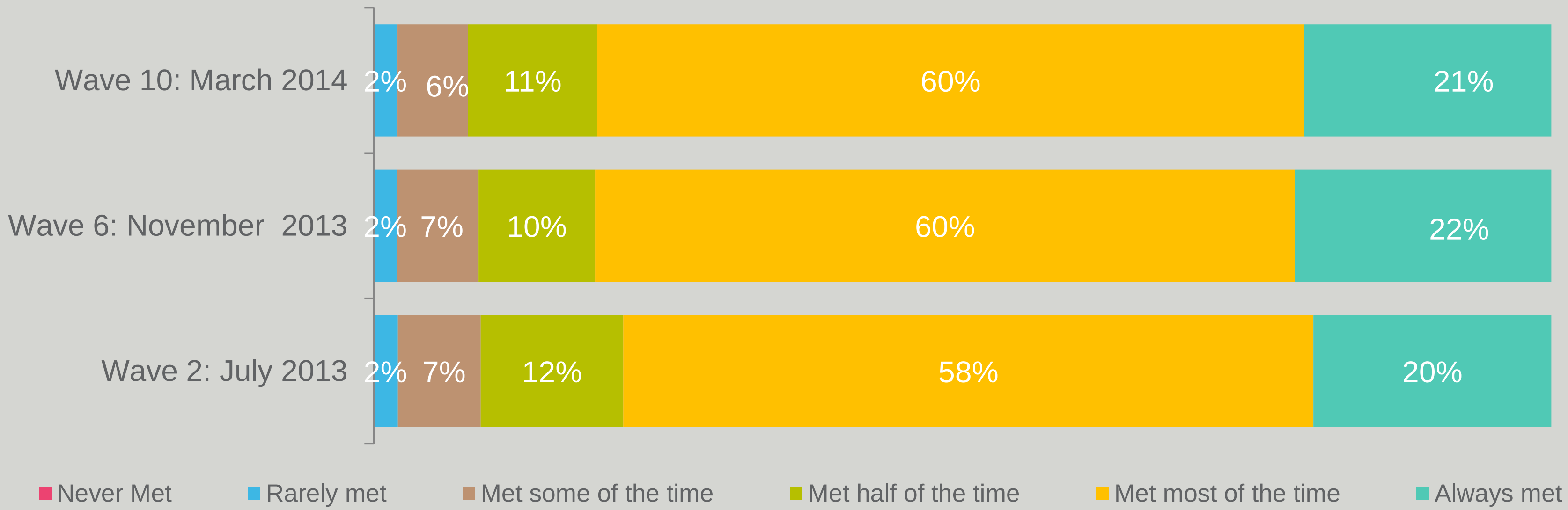
Freshness and Longevity

Expected to stay fresh for **10.0** days

▼ 9.7 days, Wave 2
▼ 9.5 days, Wave 6

- Green Peas were expected to stay fresh for 10 days, which was consistent with July and November waves.
- Similarly, expectations of freshness were on trend with previous waves.
- Overall, this may indicate that freshness quality remained consistent across seasons.

Expectations Met



Sample Wave 2 N=503, Wave 6 N=339 and Wave 10 N=311
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> ?

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

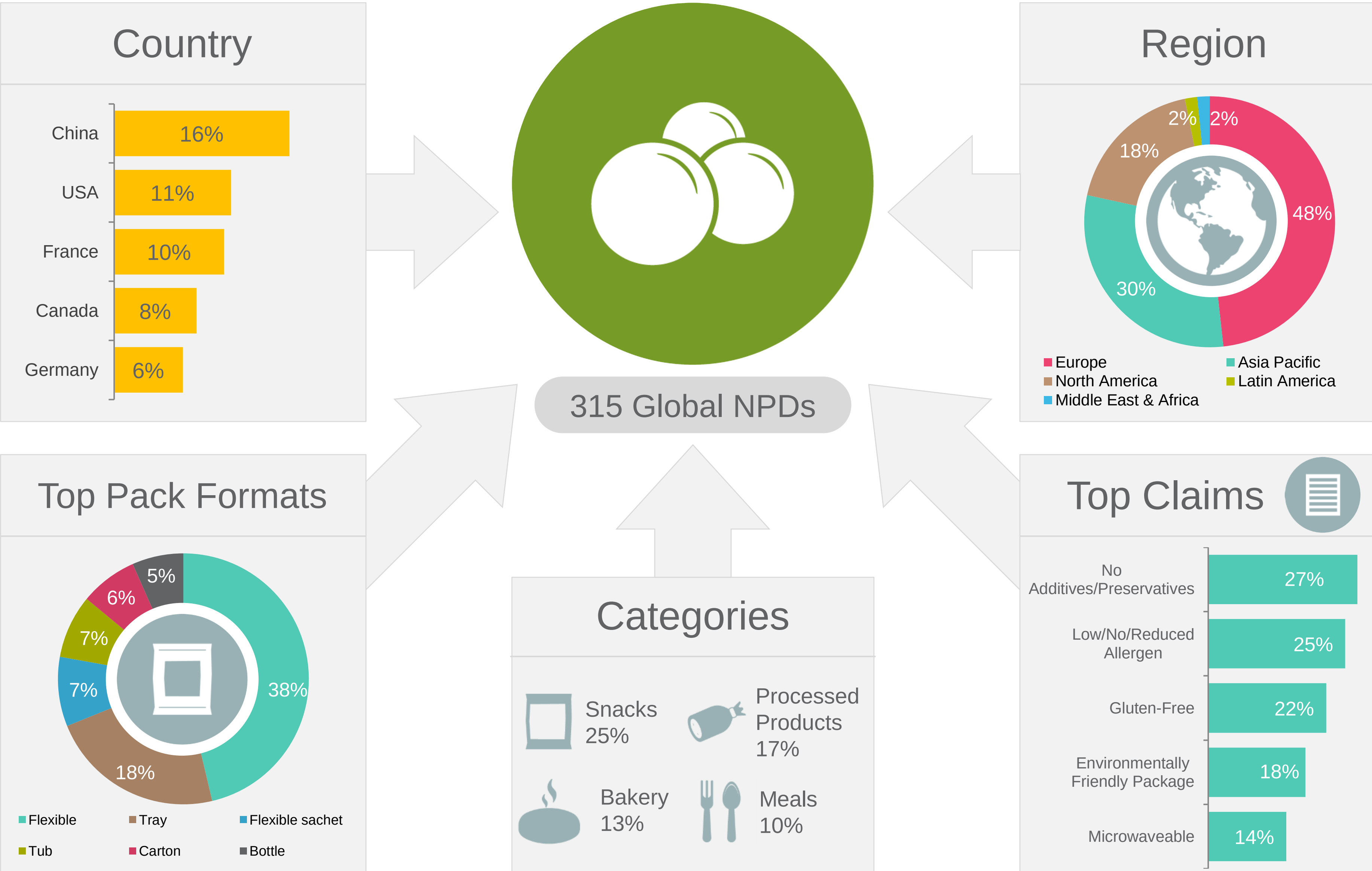
Trends:
Green Peas

**Pea was the search term in Mintel*

Green Peas Global NPDs

November – February 2013/14

There were 315 new products launched in the last 3 months that used green peas as an ingredient. The majority of these launches were in Europe. The top category products it launched in were snacks, processed food products and bakery goods.



Green Peas Product Launches:
Last 3 Months (November – February 2013/14)
Summary

- A total of 315 products that contain green peas have been launched globally in the last 3 months (approximately the same as the last tracked amount N=307), of which one of these launches was in Australia.
- The product launched in Australia was a skincare product (Dr. Lewinn's Essentials Balancing Foaming Cleanser), see upcoming slides for more information.
- Europe & Asia Pacific regions were the top 2 locations for launches, with 48% and 30%, respectively. This was on trend with all previous waves tracked.
- Flexible packaging was the most used pack format for launches in the last 3 months, with 38% of launches being packaged in this format.
- Top categories for launches were snacks (25%), processed products (17%) and bakery goods (13%).
- The core claims used globally for launches focused around health: no additives/preservatives (27%), low/no/reduced allergen (25%) and gluten free (22%), all consistent with previous waves.
- The most innovative launches found were protein shakes using pea protein and dried green pea flavouring sticks (see upcoming slides for more details).

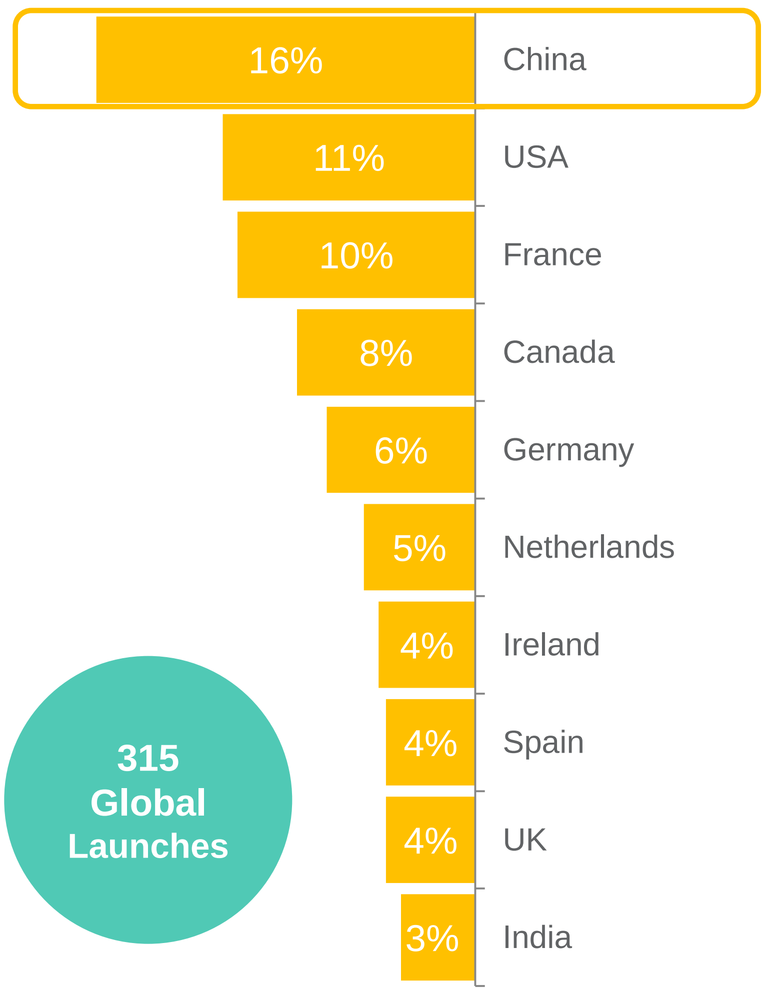
Source: Mintel (2014)

Green Peas SKUs

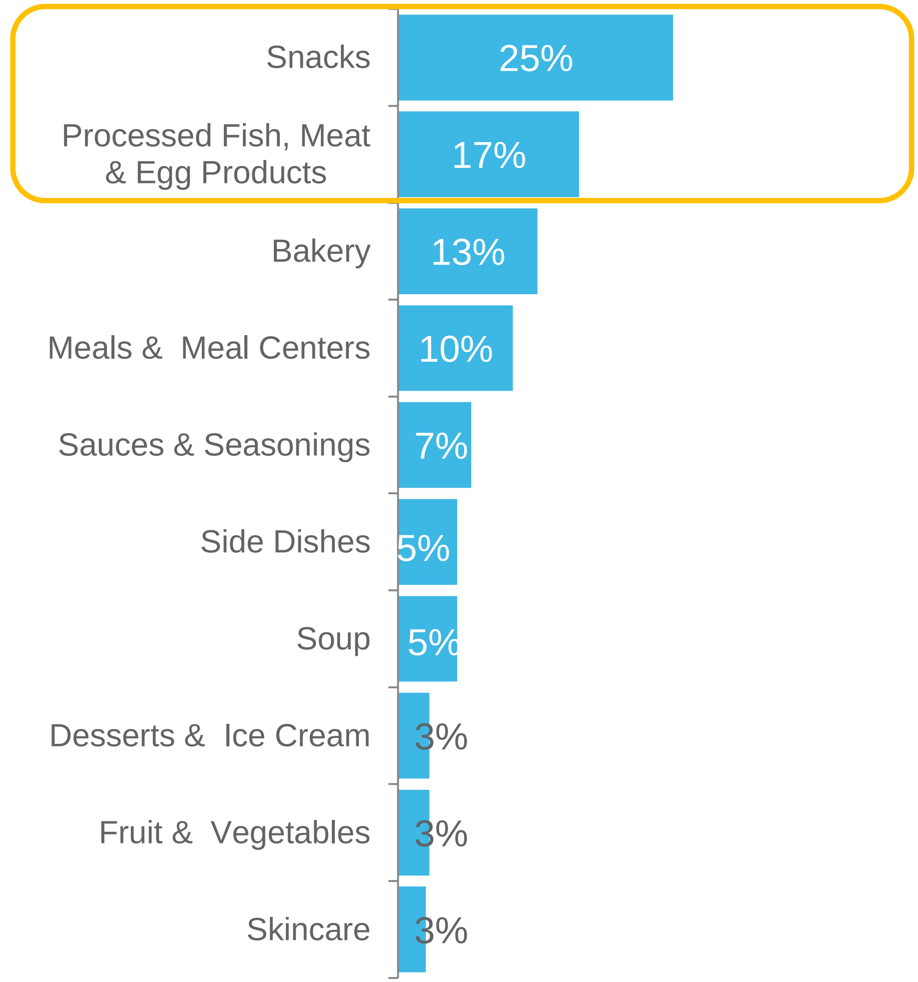
Country, Region & Categories

- China and USA were the top 2 countries for launches of green pea products in the last 3 months.
- Snacks & processed food products were the top categories for launches.

Top Launch Countries



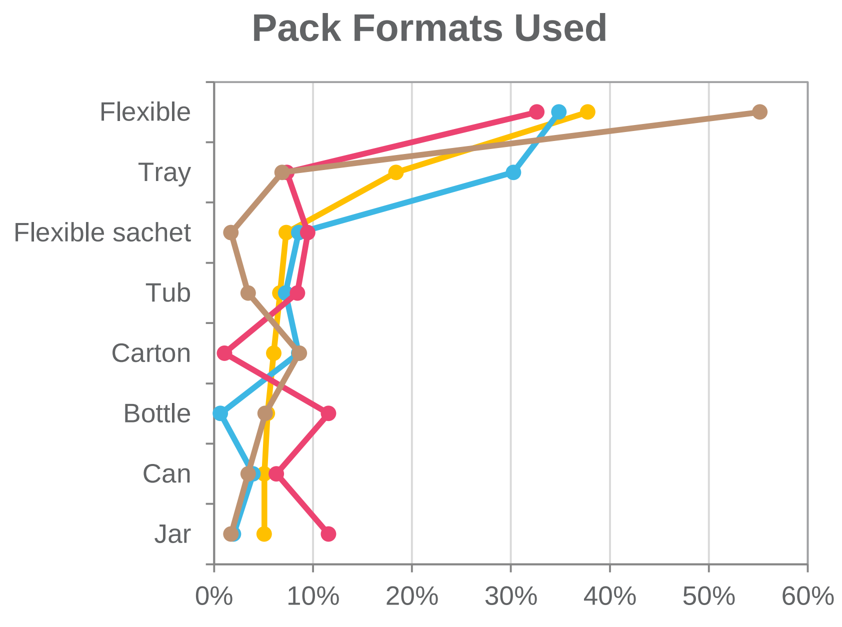
Top Launch Categories

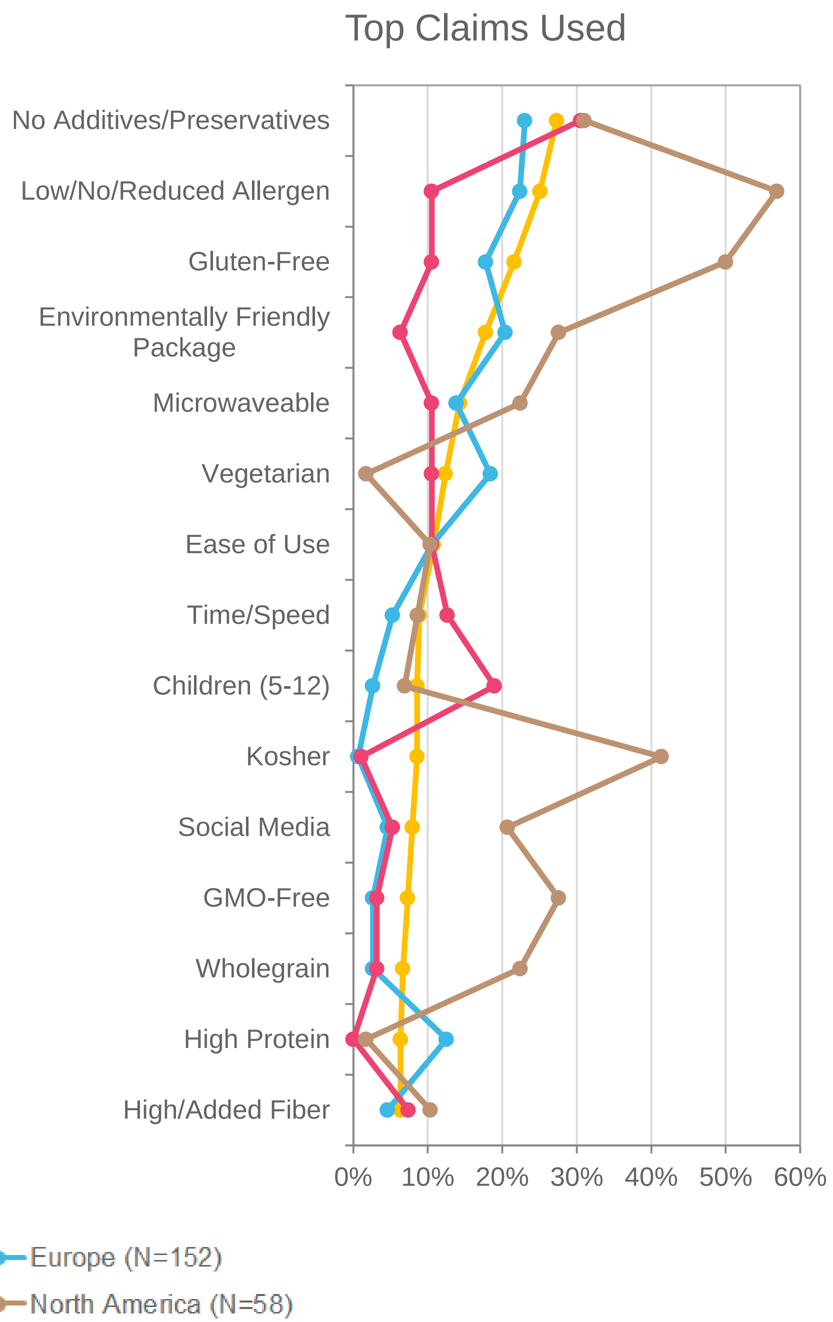


Number of Global Green Peas NPDs for the L3M N=315

Green Peas SKUs
Top Claims & Pack Formats Used

- No additives and preservatives, low/no/reduced allergens and gluten free were the top claims used for products launched containing green peas. Claims used in America were the most unique compared to other regions.
- Flexible pack formats were the most used pack format for launches in the last 3 months.
- These trends were consistent across all waves tracked for green peas.





Number of Global Green Peas NPDs for the L3M N=315
Only shown at global level as no regions had more than 30 products launched.

Innovative Green Peas Launches:
L3M (November – February 2013/14)

Just Souperior English Garden Green Pea Soup (USA)

Just Souperior English Garden Green Pea Soup is an all-natural chef prepared fresh soup made with green peas. The preservative-free product is suitable for heating in a microwave and retails in a 14-oz. pack.

Claims:
No Additives/Preservatives, All Natural Product, Microwaveable

Terroirs de Saint Laurent Olive Caviar (France)

Terroirs de Saint Laurent Caviar D'Olivier (Olive Caviar) is now available. The Ecocert certified product is 100% natural and contains no preservatives. It is preserved in olive oil, made with 95.7% organic ingredients, and retails in a 100g pack.

Claims:
No Additives/Preservatives, All Natural Product, Ethical - Environmentally Friendly Product, Organic

Tyson Day Starts Ham, Onions & Green Peppers Wrapped Omelettes (USA)

Tyson Day Starts Ham, Onions & Green Peppers Wrapped Omelettes are said to bring the weekend breakfast experience to weekday mornings. The handmade, whole egg omelettes are filled with Tyson smoked ham, fire roasted onions and green peppers wrapped in a thin,

Claims:
High Protein, Microwaveable

Vega Oh Natural Protein Smoothie (USA)

Vega Oh Natural Protein Smoothie is an instant powder drink mix with plant-based protein. Each serving provides 15g of complete protein, two servings of vegetables and only 80 calories. It provides a convenient protein boost, requires just the addition of water and can be an on-the-go snack or part of a healthy breakfast.

Claims:
Low/No/Reduced Allergen, GMO-Free, Low/No/Reduced Calorie, Convenient Packaging, On-the-Go, Time/Speed, Ease of Use, Gluten-Free, Low/No/Reduced Sugar

Source: Mintel (2014)

Innovative Green Peas Launches:
L3M (November – February 2013/14)

Xian Qing Crispy Fried Peas (China)

Xian Qing Shuang Cui Jian Dou (Crispy Fried Peas) are QS certified. The product retails in a 100g pack.

Claims:
No information available

Esprit Bento Pork & Mint Spring Rolls and Cantonese Rice (France)

Has been repackaged in a newly designed 280g partially recyclable, easy open pack featuring an 100% refund offer and the chance to win 100 Tefal woks. The microwavable product contains a sachet of soya sauce & wooden chopsticks.

Claims:
Convenient Packaging, Ethical - Environmentally Friendly Package, Microwaveable

PROM-IN Sport Nutrition Fitness Protein Bread (Czech Republic)

PROM-IN Sport Nutrition Fitness Proteinový Chléb (Fitness Protein Bread) is an excellent source of energy for body building. The 100% power bread contributes to the growth and maintenance of muscle mass and normal bones. The gluten-free product retails in a 100g pack.

Claims:
Low/No/Reduced Allergen, Other (Functional), High Protein, Weight & Muscle Gain, Gluten-Free, Bone Health

Snack Jack Shiitake Mushroom Flavoured Vegetarian Green Pea Snack (Thailand)

This non-fried snack is rich in iodine and is a source of protein, vitamin B1, vitamin E and dietary fibre. It is suitable for jain vegetarians and contains no preservatives.

Claims:
No Additives/Preservatives, Vegan, Halal, No Animal Ingredients, Vegetarian, Children (5-12), Event Merchandising

Source: Mintel (2014)

Innovative Green Peas Launches:
L3M (November – February 2013/14)

AH Basic Instant Pea Soup (Czech Republic)

AH Basic Instantni Hraskova Polevka (Instant Pea Soup Soup) is now available. The economy product retails in a 20g pack, which makes 200ml of soup.

Claims:
Economy, Time/Speed

Silk Almondmilk Protein + Fiber Original Almond Milk (USA)

Is free from dairy, lactose, gluten and soy. This responsibly produced product contains 50% more calcium than dairy milk, is a good source of protein, an excellent source of fiber with 18% more DV of fiber than regular Silk Almondmilk, and may help prolong a feeling of fullness.

Claims:
Low/No/Reduced Lactose, No Additives/Preservatives, Low/No/Reduced Allergen, Low/No/Reduced Cholesterol, High/Added Fiber, Kosher, Ethical - Environmentally Friendly Product, Ethical - Environmentally Friendly Package, Gluten-Free, High Satiety

Mr Deli Hot Wrap Chicken Curry Wrap (France)

Mr Deli Hot Wrap Poulet au Curry (Chicken Curry Wrap) is said to be delicious. It can be microwaved in its pouch and is ready in four minutes. This product retails in a 160g pack.

Claims:
Microwaveable

Logo Green Pea Flavouring Dry Provision (Vietnam)

Logo Luong Kho Dau Xanh (Green Pea Flavouring Dry Provision) has been relaunched. This product retails in a 70g pack.

Claims:
No information available

Source: Mintel (2014)

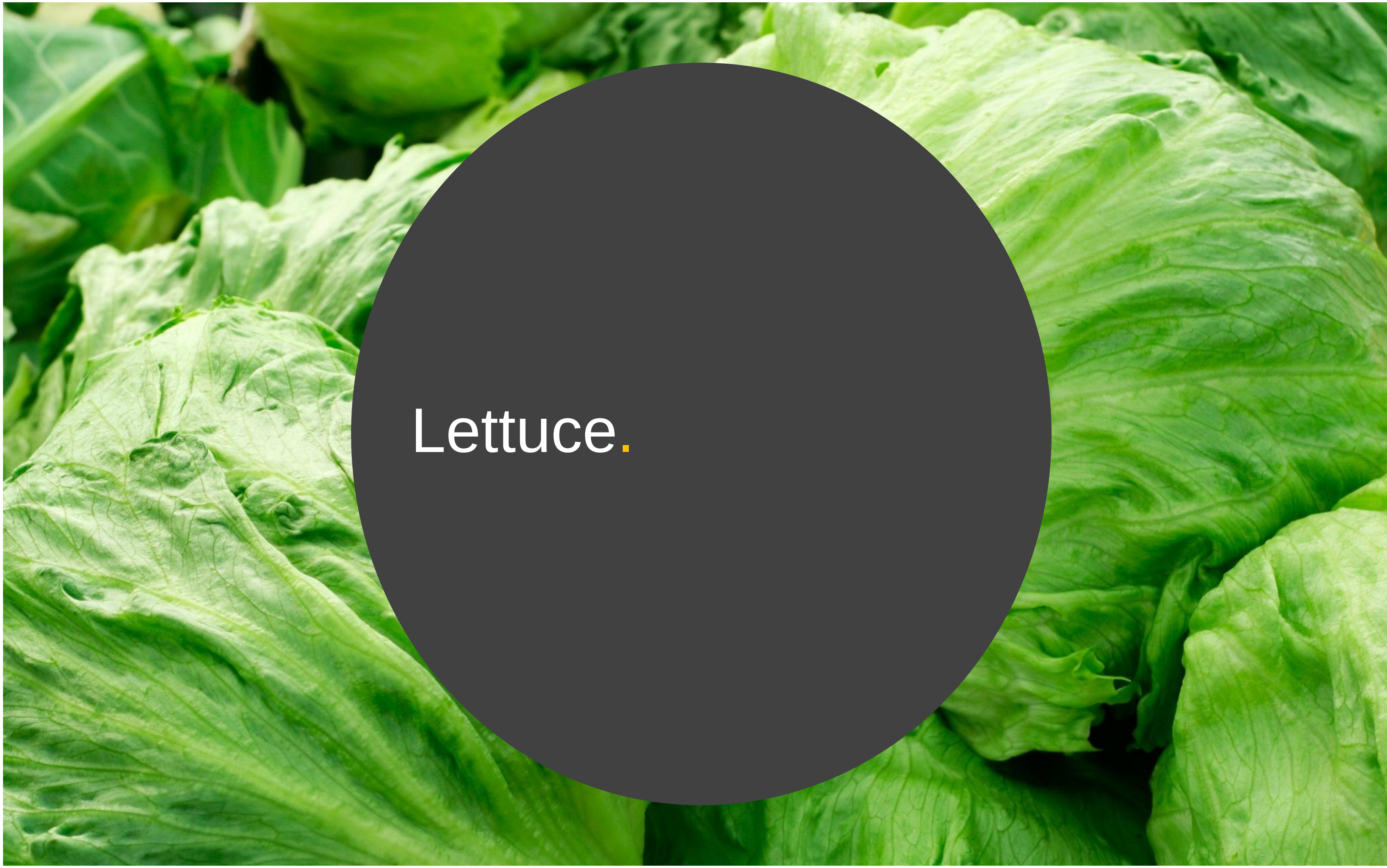
Australian Green Peas Launches:
L3M (November – February 2013/14)

Dr. Lewinn's Essentials Balancing Foaming Cleanser

Dr. Lewinn's Essentials is a range specifically designed to repair, renew and protect the skin. Included in the line is Balancing Foaming Cleanser, which is said to remove excess oil with a creamy, lathering formula that lifts away make-up and impurities leaving skin balanced clarified and refreshed.

Claims:
Botanical/Herbal, Anti-Ageing, Cleansing*, Firming*, Mattifying*

Source: Mintel (2014)



Lettuce.

Purchase and Consumption Behaviour

Average Purchase 4.6 times per month

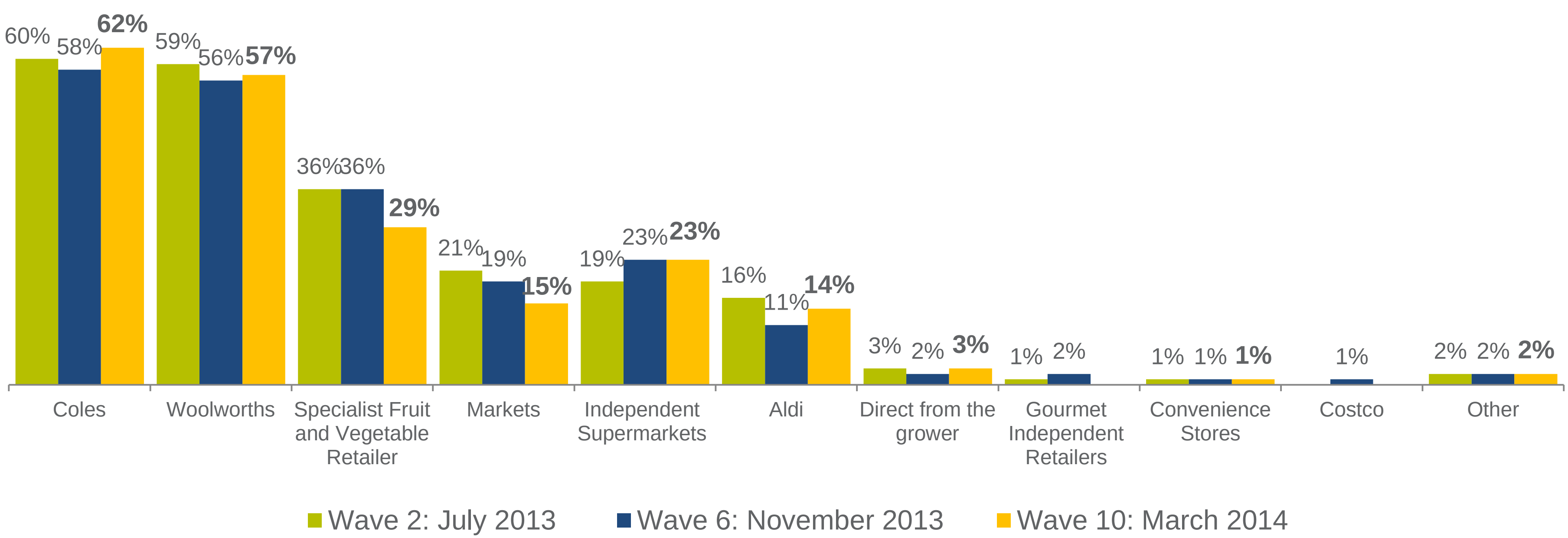
▼ 4.5 times, Wave 2
▲ 4.9 times, Wave 6

Average Consumption 14.2 times per month

▼ 13.6 times, Wave 2
▲ 14.7 times, Wave 6

- Purchase and consumption frequency was on trend with previous waves. Lettuce was consistently consumed every 2-3 days.
- Purchase was typically made through mainstream retail channels.
- There was a trend towards decreased purchase from specialist retailers and markets this wave. However consumers were more likely to purchase from independents.

Purchase Channel



Q1. On average, how often do you purchase <commodity> ?
Q2. On average, how often do you consume <commodity>?
Q5. From which of the following channels do you typically purchase <commodity> ?
Sample Wave 2 N=512, Wave 6 N=370, Wave 10 N=326

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

Average Spend and Price Sensitivity

Average weight of purchase

The typical consumer purchased **700g** of lettuce, which was on trend with previous waves.

— 700g, Wave 2
▲ 800g, Wave 6

Recalled last spend

Recalled last spend on lettuce purchase was **$3.50.** This was on trend with November purchase.

▼ $3.07, Wave 2
▼ $3.47, Wave 6

Value for money

Consumers' perceived value for money was relatively fair **(6.0/10)**, consistent with previous waves.

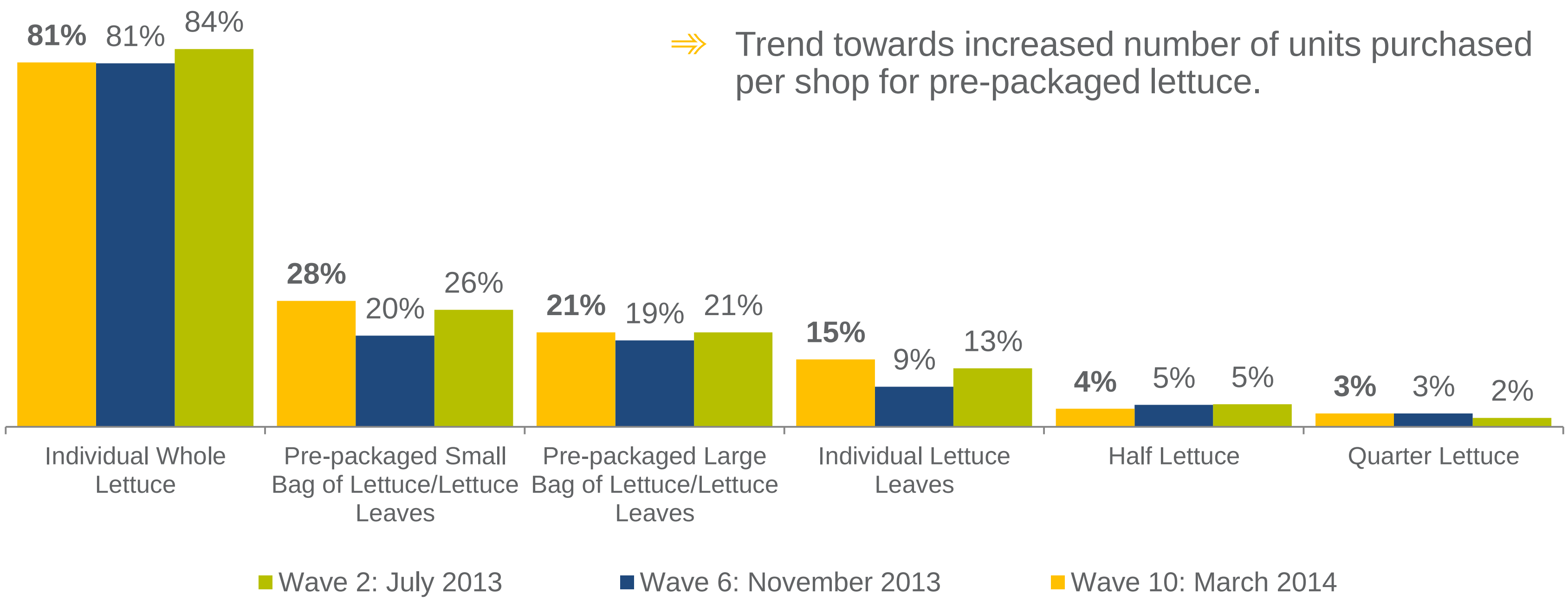
▲ 6.1/10, Wave 2
— 6.0/10, Wave 6

Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? 0-10 scale
Sample Wave 2 N=512, Wave 6 N=370, Wave 10 N=326

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

Pack Formats Purchased

- Individual whole lettuce remained the most common format purchased, typically one unit per shop.
- Trend towards increased number of units purchased per shop for pre-packaged lettuce.

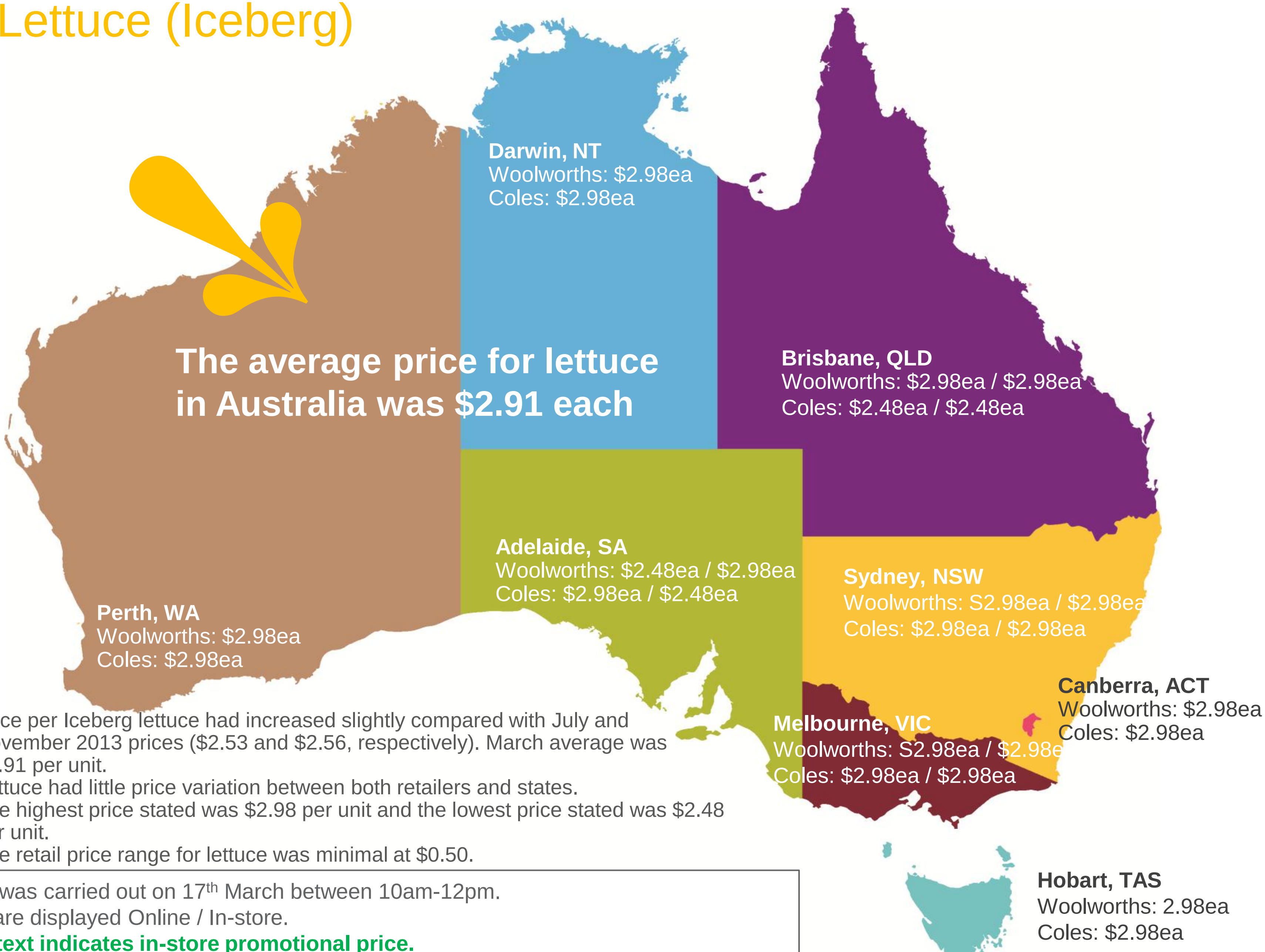


Average amount purchased per shop	Individual Whole Lettuce	Pre-packaged small bag of lettuce	Pre-packaged large bag of lettuce	Individual lettuce leaves	Half lettuce	Quarter lettuce
Wave 2: July 2013	1.1	1.2	1.2	14.6	1.5	1.9
Wave 6: November 2013	1.2	1.3	1.3	8.5	1.4	1.6
Wave 10: March 2014	1.2	1.5	1.5	12.4	1.7	2.3

Q3a. How much <commodity> does this typically equate to?
Sample Wave 2 N=512, Wave 6 N=370, Wave 10 N=326

Online and In-store Commodity Prices

Lettuce (Iceberg)

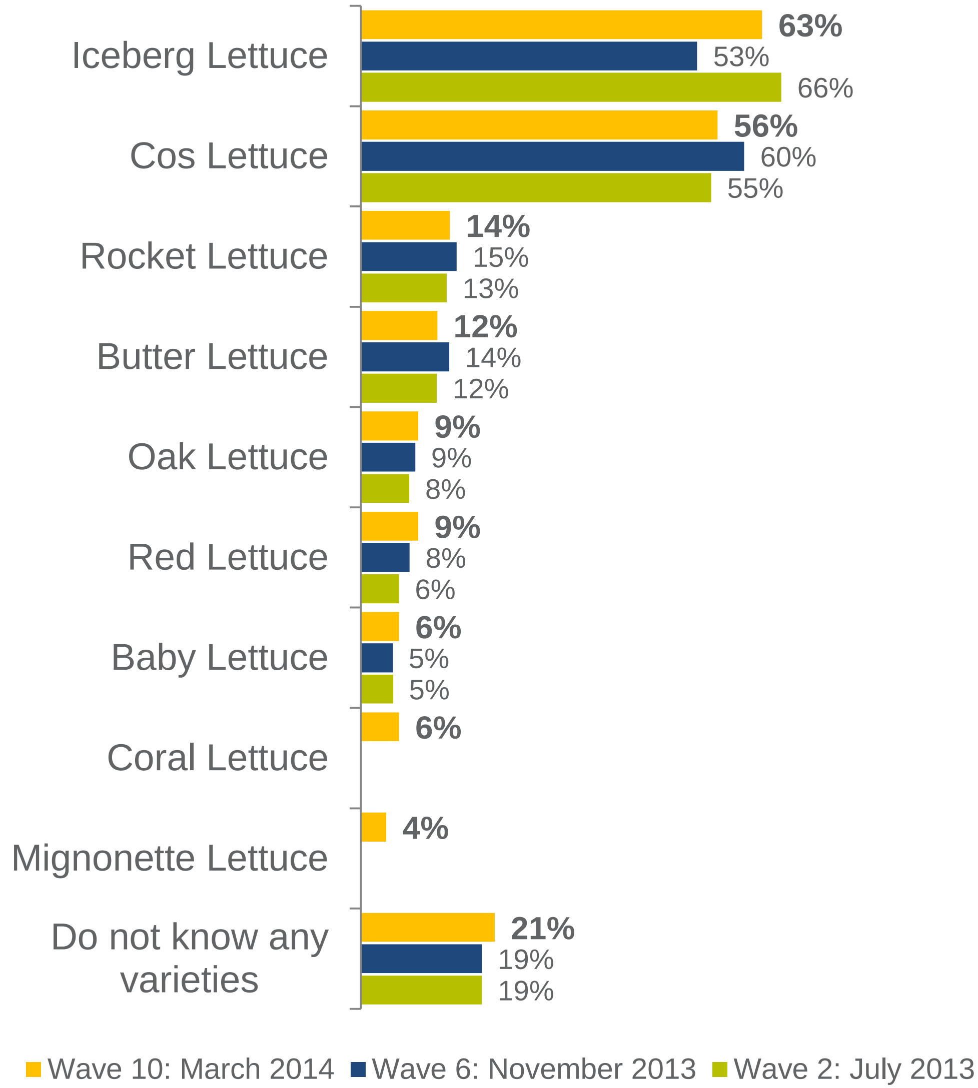


- Price per Iceberg lettuce had increased slightly compared with July and November 2013 prices ($2.53 and $2.56, respectively). March average was $2.91 per unit.
- Lettuce had little price variation between both retailers and states.
- The highest price stated was $2.98 per unit and the lowest price stated was $2.48 per unit.
- The retail price range for lettuce was minimal at $0.50.

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

Spontaneous Commodity Type Awareness

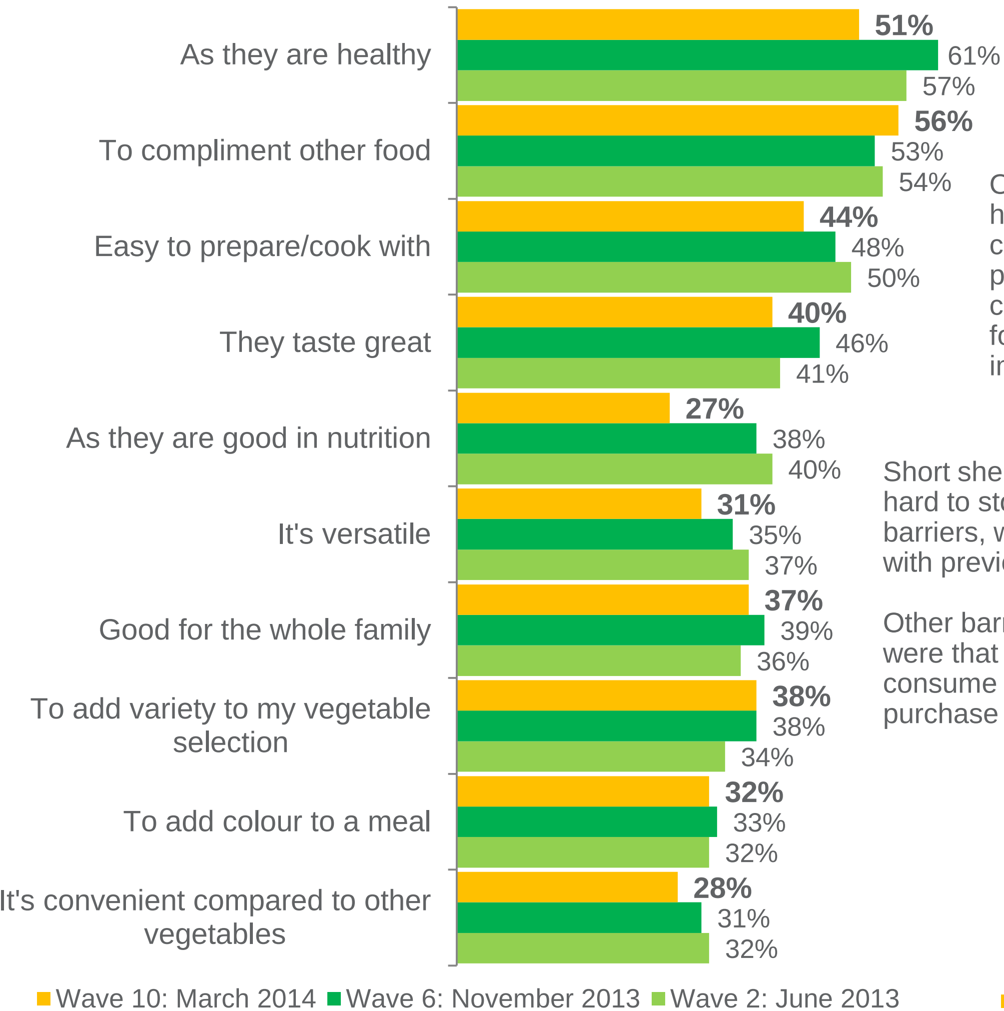
- Awareness of lettuce types was relatively strong and consistent with previous waves. Approximately one fifth of consumers were unable to name a type.
- Iceberg and Cos lettuce were the main types recalled by over half of respondents.



Sample Wave 2 N=512, Wave 6 N=370, Wave 10 N=326
Q6a. What types/varieties of <commodity> are you aware of? (unprompted)

Triggers and Barriers to Purchase

Triggers

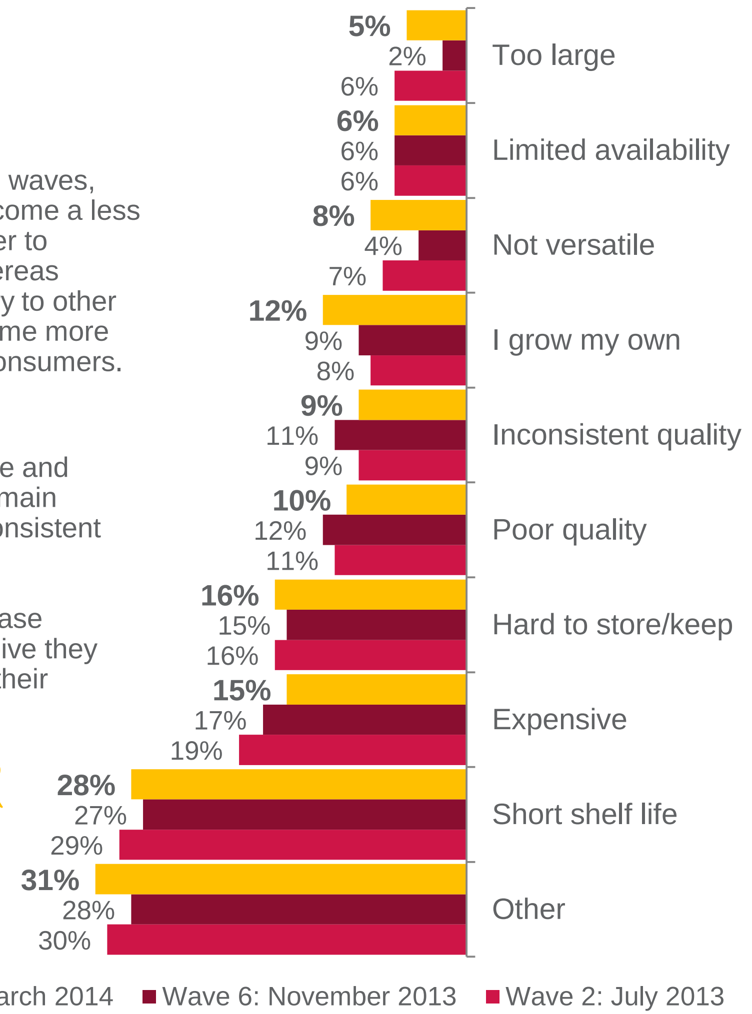


Over the three waves, health has become a less common trigger to purchase, whereas complementary to other food has become more important to consumers.

Short shelf life, expense and hard to store were the main barriers, which were consistent with previous waves.

Other barriers to purchase were that people perceive they consume enough and their purchase lasts a week.

Barriers



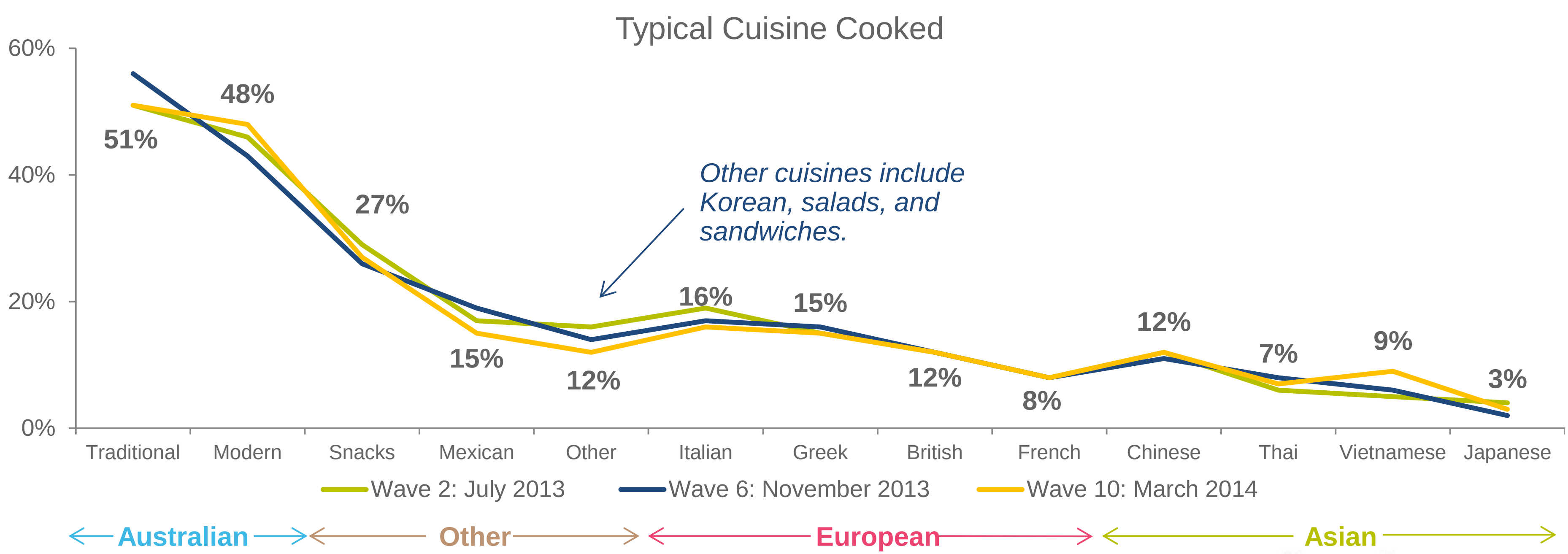
Sample Wave 2 N=512, Wave 6 N=370
* Indicates significantly higher score between Waves at 95% CI
Q7. Which of the following reasons best describes why you purchase <commodity> ?
Q8. Which reason best describes why you don't buy <commodity> more often?

Cooking Cuisine and Occasions

- Australian remained the most commonly cooked cuisine. Cuisine preferences were on trend with previous waves.
- Week day consumption, lunch and dinner, were the typical consumption occasions. This is likely due to the convenience of preparation of lettuce and vegetable staple.

Wave 10 Top 5 Consumption Occasions

Weekday lunch	49%	▲ Wave 2	▲ Wave 6
Weekday dinner	43%	▼ Wave 2	▲ Wave 6
Weekend lunch	43%	▲ Wave 2	▼ Wave 6
Quick meals	38%	▲ Wave 2	▲ Wave 6
Every-day meals	38%	▼ Wave 2	▲ Wave 6



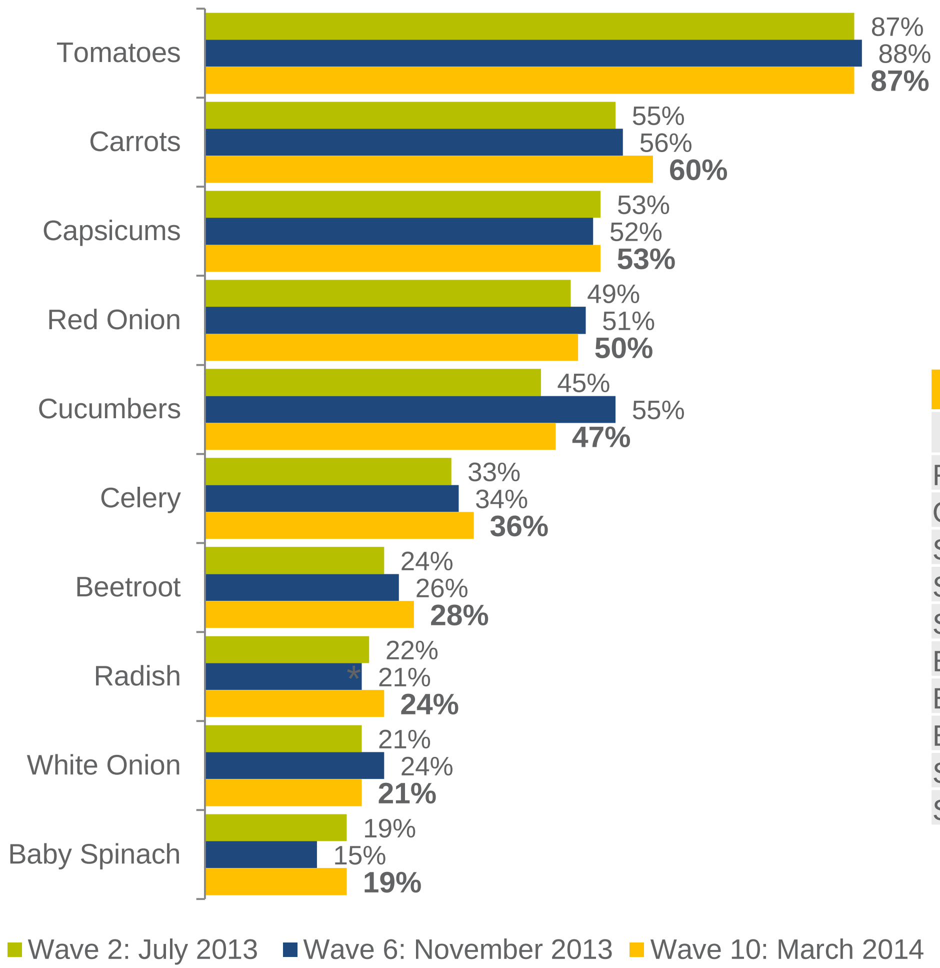
Sample Wave 2 N=512, Wave 6 N=370, Wave 10 N=326
Q10. What cuisines do you cook/consume that use <commodity> ?
Q11. Which of the following occasions do you typically consume/use <commodity> ?

colmar brunton.

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

Cooking Preferences

Top 10 Accompanying Vegetables



- Nearly all consumers used lettuce raw.
- In line with lettuce bring used a salad ingredient, it was typically served with tomatoes, carrots and capsicums.

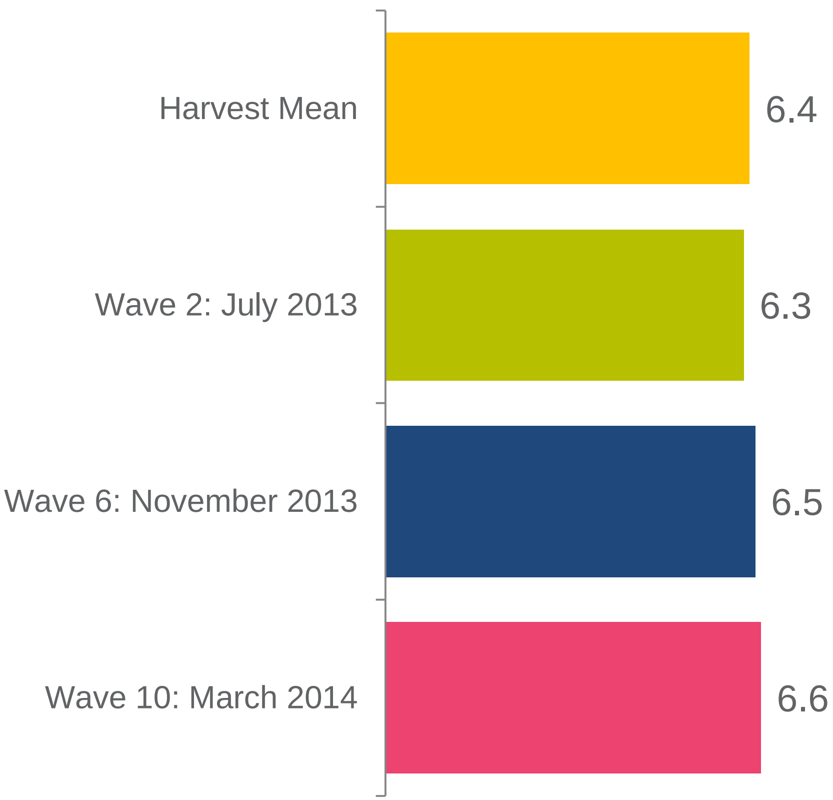
Top 10 Cooking Styles

	Wave 2	Wave 6	Wave 10
Raw	74%	71%	72%
Other- Not cooked	21%	23%	23%
Stir frying	5%	6%	3%
Soup	3%	2%	2%
Steaming	2%	2%	2%
Blanche	2%	1%	2%
Boiling	2%	1%	2%
Blend	1%	3%	1%
Shallow Frying	1%	1%	1%
Sun/Air Drying	1%	2%	1%

Sample Wave 2 N=512, Wave 6 N=370, Wave 10 N=326
Q9. How do you typically cook <commodity> ?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?

Importance of Provenance

⇛ There was a trend towards increased importance of lettuce provenance. The importance of lettuce provenance was slightly higher than the Harvest average of all commodities tracked.



AUSTRALIAN MADE®

Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 2 N=512, Wave 6 N=370, Wave 10 N=326

Freshness and Longevity

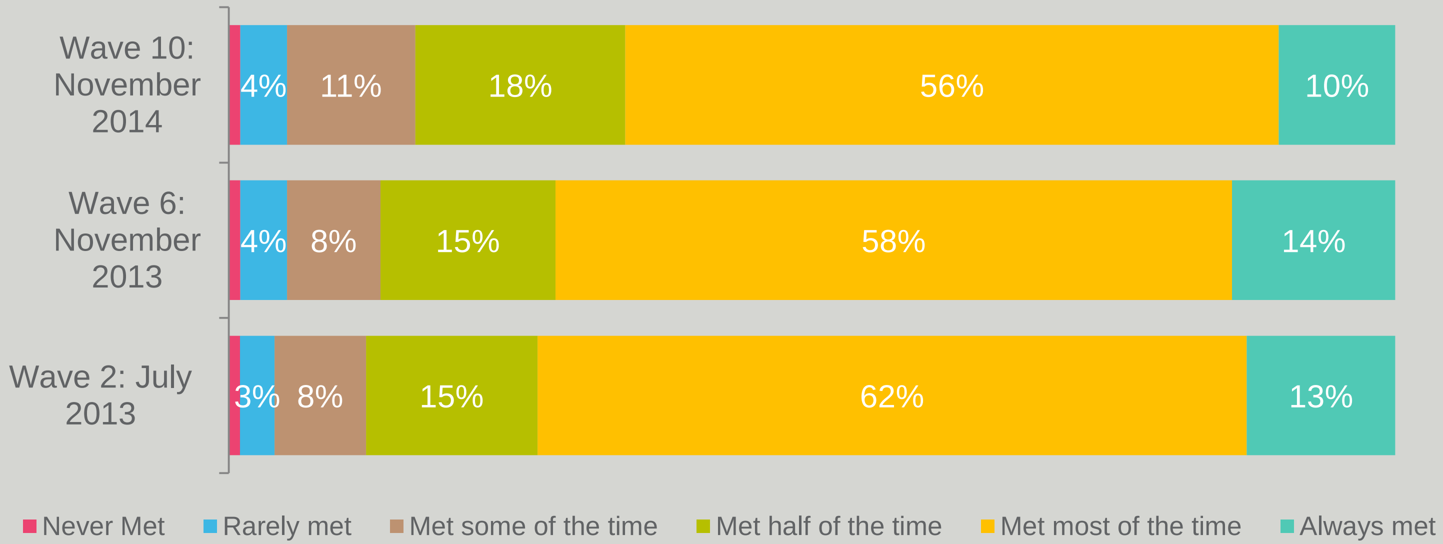
Expected to stay fresh for **7.3** days

▲ 7.6 days, Wave 2

▼ 7.0 days, Wave 6

- Lettuce was expected to stay fresh for one week after purchase, which was consistent with previous waves.
- However, expectations of freshness were less likely to be met in March, compared with July and November last year.

Expectations Met



Sample Wave 2 N=512, Wave 6 N=370, Wave 10 N=326
Q12. How long do you expect <commodity> to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy <commodity> ?

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

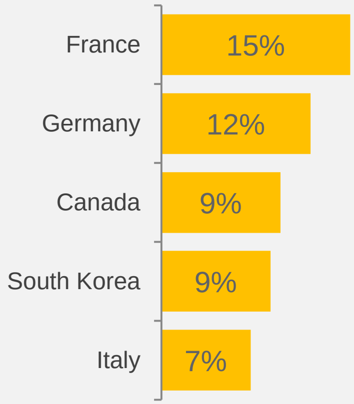
Trends: Lettuce

Lettuce Global NPDs

November – February 2013/14

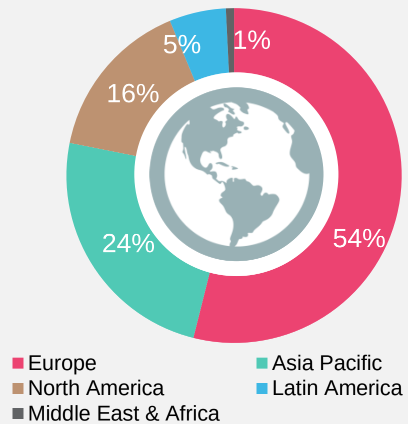
There were 128 new products launched in the last 3 months globally containing lettuce as an ingredient. Over half of these launches occurred in Europe. The top categories for launches were meals and fruit and vegetables. The amount of launches and overall trends shown below were consistent across all waves tracked for lettuce products.

Country

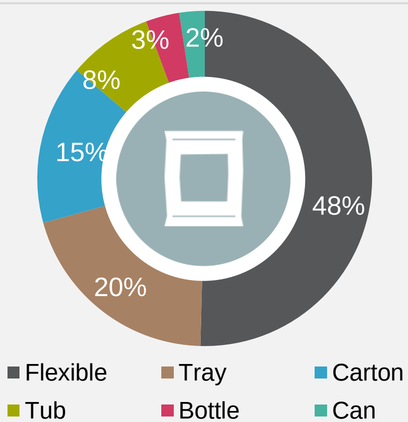


128 Global NPDs

Region



Top Pack Formats



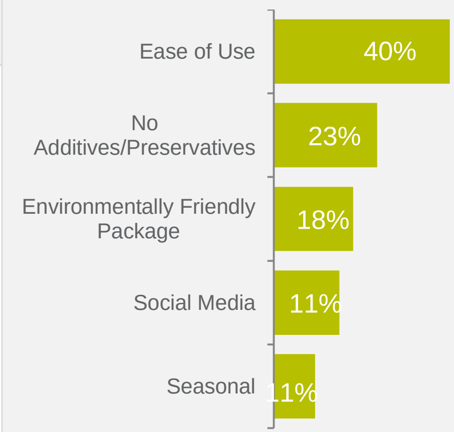
Categories

Meals 41%

Fruit & Vegetables 39%

Juice Drinks 12%

Top Claims



Lettuce Product Launches:
Last 3 Months (November – February 2013/14)
Summary

- Globally, there were 128 launches of products that contained lettuce as an ingredient in the last 3 months. This was consistent with all previous waves tracked.
- There were only two lettuce products launched in Australia in the last 3 months (both being salad packs, see upcoming slides for more detail).
- The majority of products launched in the last 3 months were in Europe (54%).
- Flexible & tray packaging were the top pack formats used, 48% and 20% respectively, this is consistent with all previous waves.
- The top categories for launches were meals (41%), fruit and vegetables (39%) and juice drinks (12%). These categories were consistent with all previous waves.
- The core claims used for launches globally were ease of use (40%), no additives and preservatives (23%) and having environmentally friendly packaging (18%).
- The most innovative launches found were body creams and essential greens juices. Examples of these can be found over the next slides.

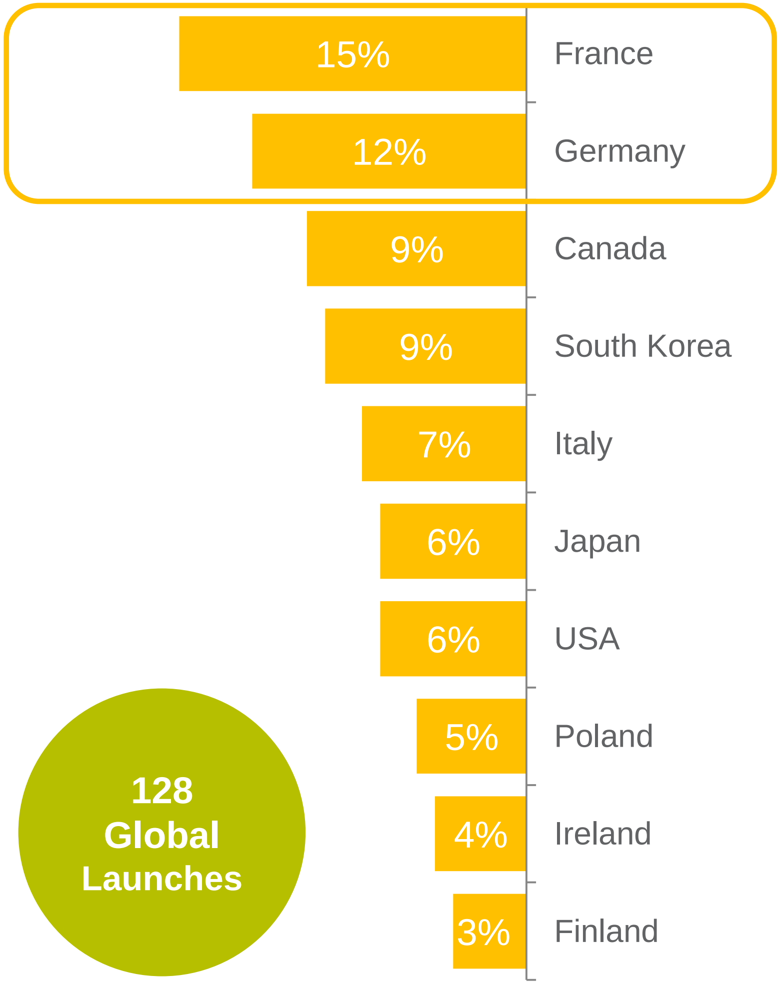
Source: Mintel (2014)

Lettuce SKUs

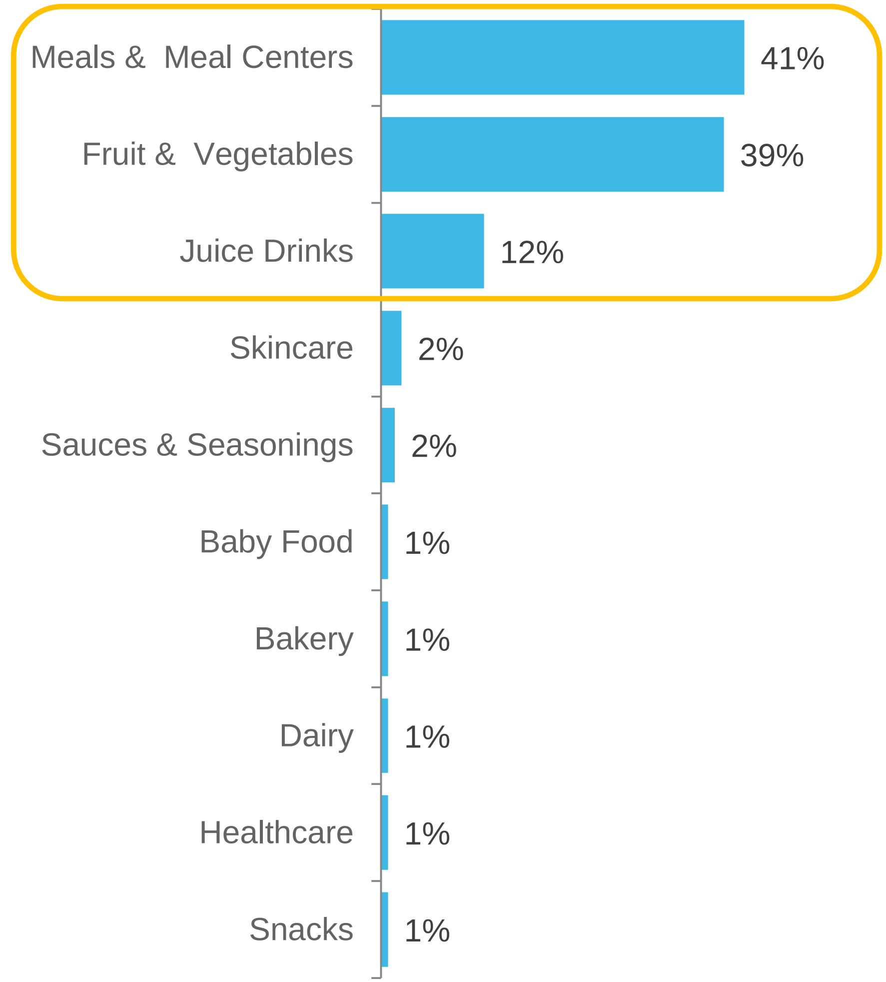
Country, Region & Categories

- The top launch locations for lettuce products in the last 3 months were France & Germany.
- Meals, fruit & vegetables and juices had the greatest number of launches in the last 3 months.

Top Launch Countries



Top Launch Categories



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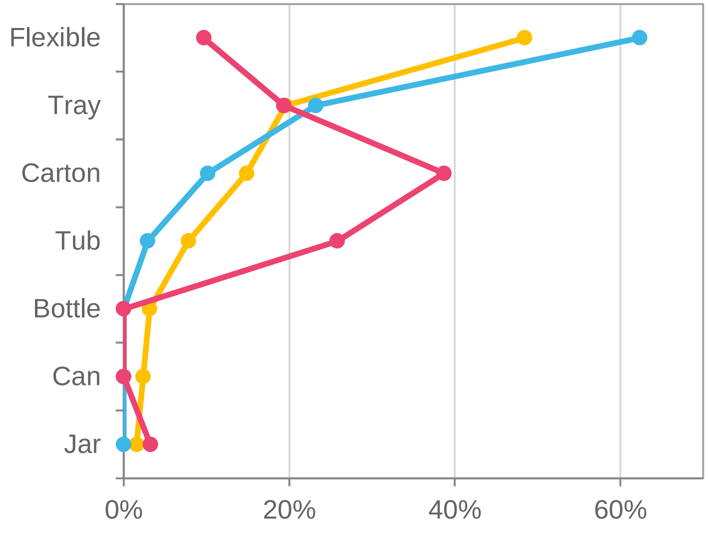
Number of Global Lettuce NPDs for the L3M N=128

Lettuce SKUs

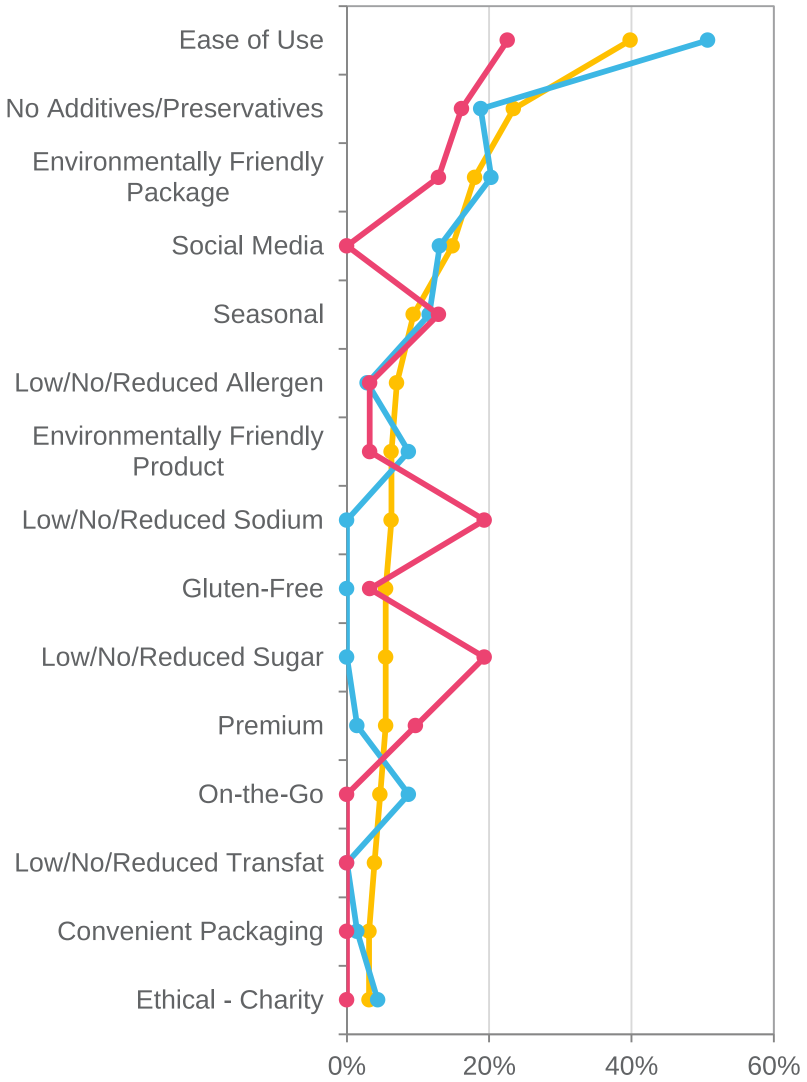
Top Claims & Pack Formats Used

- Ease of use and no additives/preservatives were the top claims globally in the last 3 months.
- Flexible packaging was the most common pack format globally, followed by trays. Cartons and tubs however, were more popular in Asia Pacific regions.
- These trends were consistent across all previous waves tracked.

Pack Formats Used



Top Claims Used



Global (N=128) Europe (N=69) Asia Pacific (N=31)

Number of Global Lettuce NPDs for the L3M N=128
Only regions with n >30 are displayed

Innovative Lettuce Launches:
L3M (November – February 2013/14)

Arensburg Lechuga Body Cream (Chile)

Arensburg Lechuga Crema (Lettuce Body Cream) is now available in a newly designed 60ml pack. The product is enriched with emollient and hydrating components to prevent moisture loss and protect skin from the environment, for natural softness and smoothness.

Claims:
Botanical/Herbal, Moisturising / Hydrating, Protects Against Elements*

Eat Away Vietävä Syötävä Mozzarella Salad (Finland)

Mozzarella Salad comprises fresh salad, mozzarella cheese, honey roasted sunflower seeds and a separate sachet of salad dressing that can be combined to create a salad. The takeaway product is lactose-free and retails in a 230g pack with a fork included.

Claims:
Low/No/Reduced Lactose, Low/No/Reduced Allergen, On-the-Go

Kagome Yasai Seikatsu 100 White Peach Mix Juice (Japan)

Kagome Yasai Seikatsu 100 White Peach Mix Juice has been relaunched for spring 2014 featuring new formulation and packaging. The product features Kawanakashima white peach from Nagano prefecture to offer thick sweet flavour and aroma.

Claims:
Seasonal, Low/No/Reduced Sodium, Low/No/Reduced Sugar

Choice L 900 Red Salad (South Korea)

Choice L 900 Red Salad is now available on the market. This HACCP certified product provides a way to conveniently enjoy a variety of vegetables, and retails in a 70g pack.

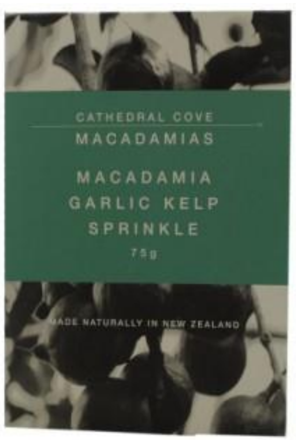
Claims:
Ease of Use

Source: Mintel (2014)

Innovative Lettuce Launches:
L3M (November – February 2013/14)

Cathedral Cove Macadamias Macadamia Garlic Kelp Sprinkle (New Zealand)

Naturally made from crushed macadamia nuts, sea kelp and garlic. It contains no gluten, wheat or dairy and is suitable for vegetables, pasta, fish, seafood, poultry and meat. The product retails in a recyclable 75g pack, which is chlorine-free and printed with vegetable ink.



Claims:
Gluten-Free, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Package

Western Family Vegetable Cocktail (Canada)

Western Family Vegetable Cocktail has been repackaged in a 1.89L pack. The pasteurised product is low in sodium, contains added vitamin C and is a source of vitamin A. It contains two portions of vegetables per 250ml and has been reviewed by the Heart and Stoke Foundation to ensure it meets the specific nutrient criteria developed by the Health Check.

Claims:
Ethical - Charity, Low/No/Reduced Sodium, Vitamin/Mineral Fortified

Casino Tuna Salad (France)

Tuna Salad comprises rice, hard boiled egg, salad leaves, natural tuna, cherry tomatoes and black olives, accompanied by a balsamic vinegar sauce and bread sticks. This product retails in a 320g recyclable pack which serves one and includes a plastic fork and paper serviette.

Claims:
Ethical - Environmentally Friendly Package

Evolution Fresh Essential Greens with Lime Juice Blend (USA)

Evolution Fresh Essential Greens with Lime Juice Blend comprises celery, cucumber, spinach, romaine, kale, lime, parsley, wheat grass and clover sprouts. The kosher, cold-pressed product has never been heated and retails in a 15.2-fl. oz. bottle.

Claims:
Kosher

Source: Mintel (2014)

Innovative Lettuce Launches:
L3M (November – February 2013/14)

Toppo Lunch Box Fresh Salad with Salad Cheese (Poland)

Toppo Lunch Box Salatka z Serem Salatkowym (Fresh Salad with Salad Cheese) includes a garlic-dill sauce and fork. The on-the-go product is ready to eat and retails in 250g pack.

Claims:
Ease of Use, On-the-Go

Fresh Attitude Greek Salad Mix (Canada)

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

Claims:
Convenient Packaging, Social Media

Marché Franprix Roasted Chicken Wrap with Caesar Sauce (France)

Marché Franprix Wrap Poulet Rôti Sauce Caesar (Roasted Chicken Wrap with Caesar Sauce) comprises a defrosted wheat flatbread with flax seeds, and filled with a fromage blanc and cheese sauce, roasted and salted chicken fillet cubes, crudités and defrosted half-dried seasoned tomatoes. This product retails in a 180g pack containing two wraps.

Claims:
Microwaveable

Algoplus Les Authentiques Coarse Sea Salt with Algae (France)

Algoplus Les Authentiques Gros Sel Marin aux Algues (Coarse Sea Salt with Algae) is said to add flavour when cooking fish, shellfish, crustaceans, pasta and rice. The product retails in a 500g pack.

Claims:
No information available

Source: Mintel (2014)

Australian Lettuce Launch:
L3M (November – February 2013/14)

Woolworths Select Australian Grown Summer Lettuce

Woolworths Select Australian Grown Summer Lettuce is described as a tasty combination of sweet lettuce and crunchy red cabbage. This washed and ready-to-use product retails in a 200g pack.

Claims:
Ease of Use, Seasonal

Coles Caesar Salad

Coles Caesar Salad is described as a delicious salad with bacon, crispy croutons, shaved parmesan and a creamy Caesar dressing. The product retails in a partly recyclable 200g pack that includes a fork, 40g pack Caesar dressing, 15g pack of large bacon, 10g Caesar croutons, and 20g pack of parmesan.

Claims:
Ethical - Environmentally Friendly Package

Source: Mintel (2014)

Sweet Corn.

Purchase and Consumption Behaviour

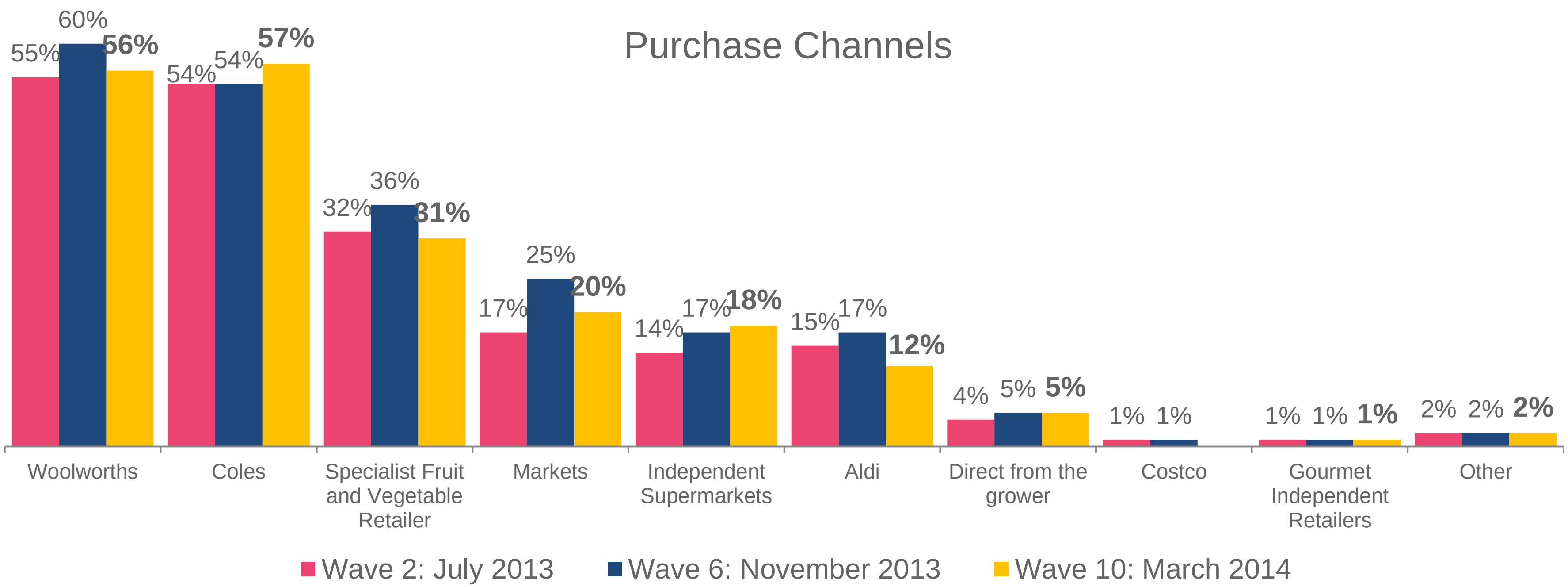
Average Purchase **3.0** times per month

▲ 3.3 times, Wave 2
▲ 3.6 times, Wave 6

Average Consumption **5.8** times per month

▲ 5.9 times, Wave 2
▲ 6.5 times, Wave 6

- There was a trend towards decreased purchase and consumption frequency across the three waves. However on average Sweet Corn was consumed six times per month.
- Mainstream retailers remained the main purchase channel. Specialist retailers, markets and independent supermarkets were also common purchase locations.



Q1. On average, how often do you purchase <commodity>?
Q2. On average, how often do you consume <commodity>?
Q5. From which of the following channels do you typically purchase <commodity>?
Sample Wave 2 N=509, Wave 6 N=324, Wave 10 N=301

colmar brunton.

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

Average Spend and Price Sensitivity

Average weight of purchase

The typical consumer purchased **900g** of sweet corn, which was consistent with previous waves.

▼ 800g, Wave 2
— 900g, Wave 6

Recalled last spend

Recalled last spend on sweet corn purchase was **$3.62.** This was on trend with July purchase, somewhat lower than November.

▼ $3.55, Wave 2
▲ $3.92, Wave 6

Value for money

Consumers' perceived value for money was good **(6.5/10)**, and remained consistent since July 2013.

— 6.5/10, Wave 2
— 6.5/10, Wave 6

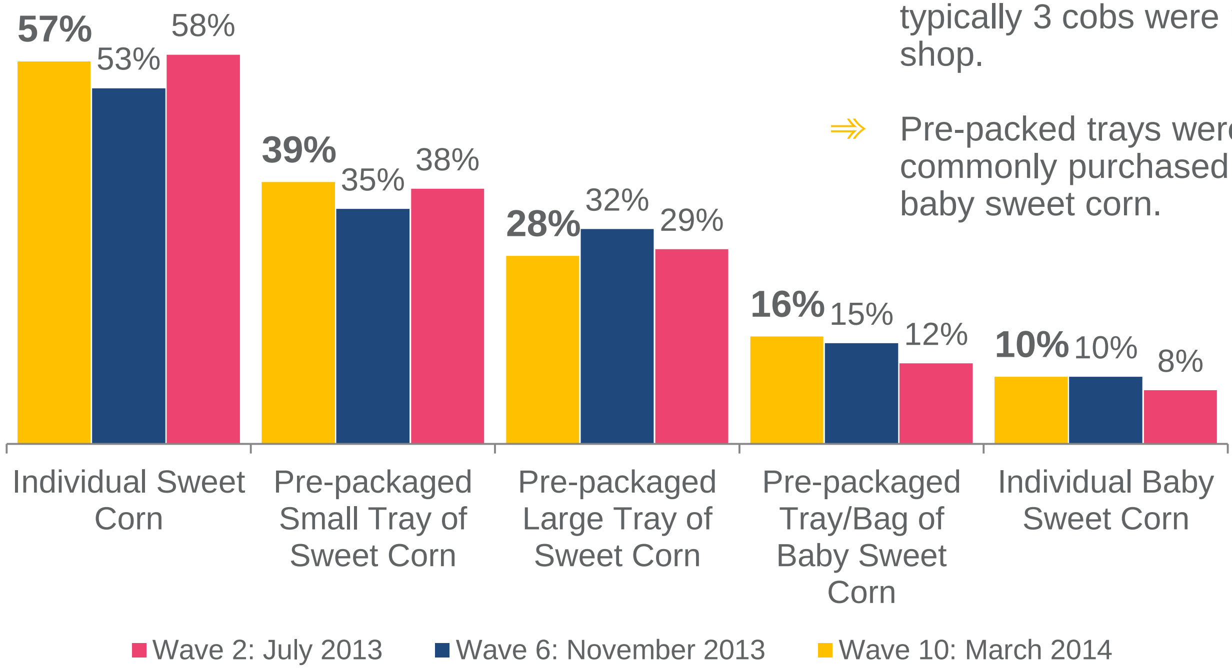
Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is?
Sample Wave 2 N=509, Wave 6 N=324, Wave 10 N=301

colmar brunton.

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

Pack Formats Purchased

- Over half of consumers purchased sweet corn in individual formats, typically 3 cobs were purchased per shop.
- Pre-packed trays were also commonly purchased, less so for baby sweet corn.



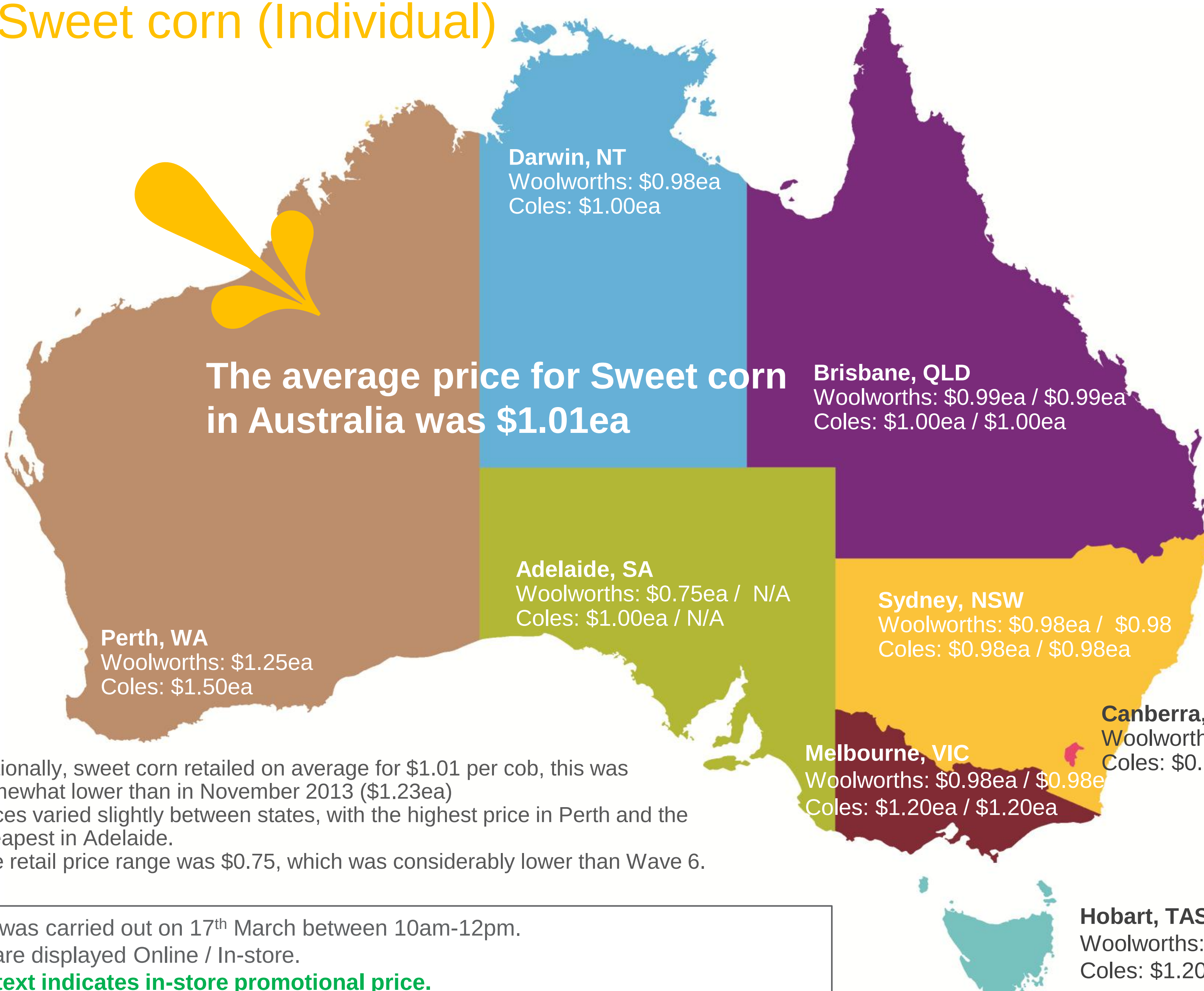
Although purchased less commonly, more units are bought per purchase.

Average Amount Purchased	Individual Sweet Corn	Pre-package Small Tray	Pre-packaged Large Tray	Pre-packaged Baby Corn	Individual Baby Corn
Wave 2: July 2013	3.3	1.6	1.6	2.0	5.5
Wave 6: November 2013	3.2	1.8	1.6	2.6	4.3
Wave 10: March 2014	3.4	1.7	1.7	1.8	5.6

Q3a. How much <commodity> does this typically equate to?
Sample Wave 2 N=509, Wave 6 N=324, Wave 10 N=301

Online and In-store Commodity Prices

Sweet corn (Individual)

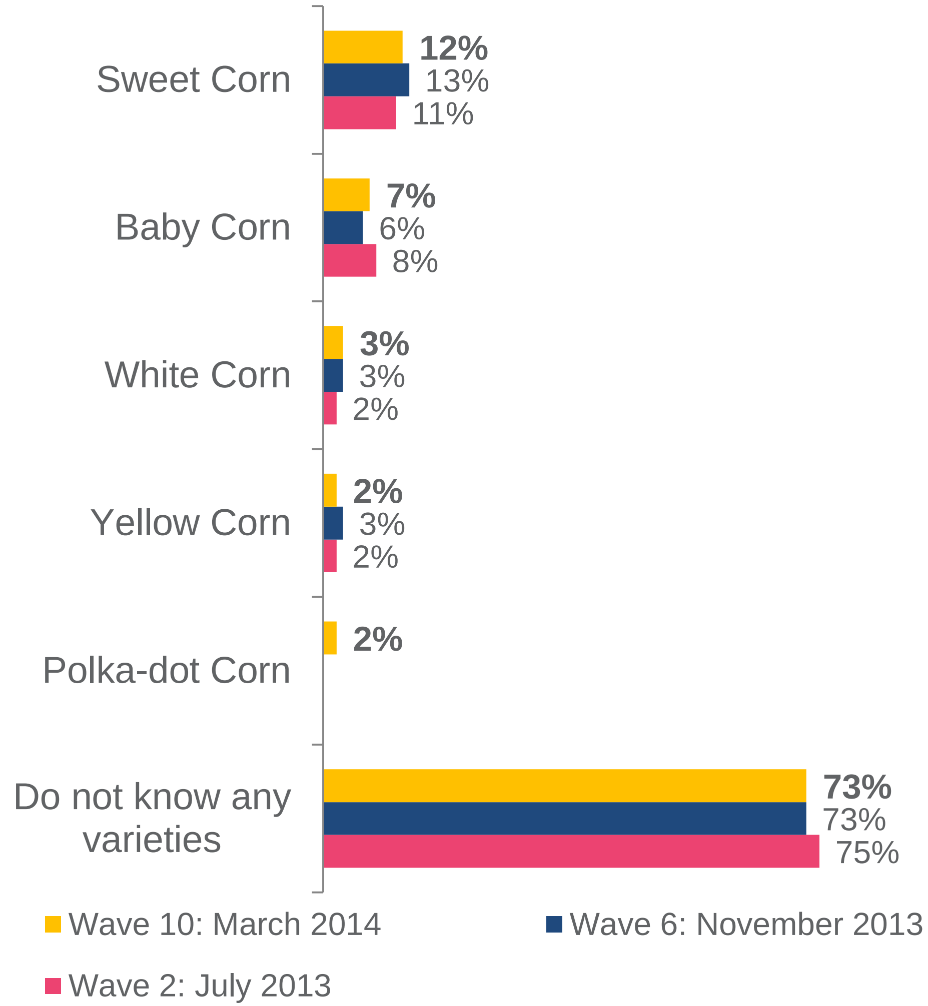


- Nationally, sweet corn retailed on average for $1.01 per cob, this was somewhat lower than in November 2013 ($1.23ea)
- Prices varied slightly between states, with the highest price in Perth and the cheapest in Adelaide.
- The retail price range was $0.75, which was considerably lower than Wave 6.

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

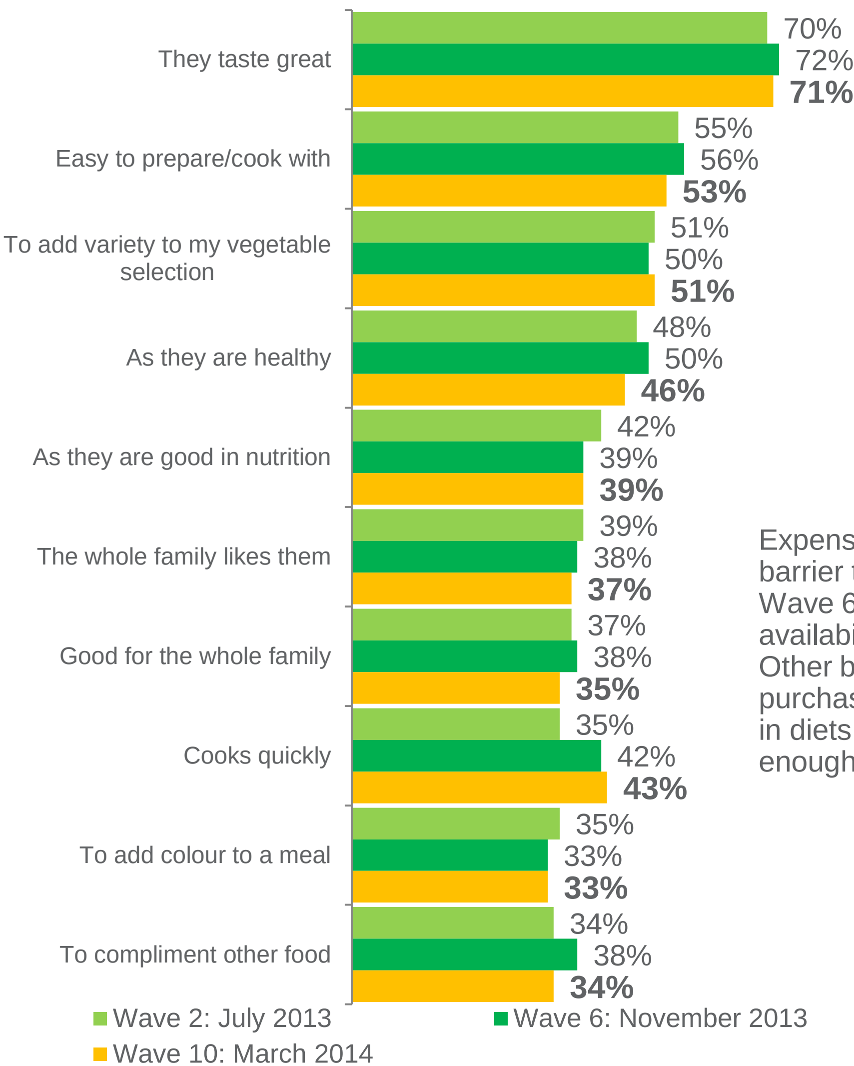
Spontaneous Commodity Type Awareness

- Awareness of sweet corn types remained very low, consistent with previous waves. ¾ of consumers indicated they were not aware of any varieties of Sweet corn.
- Sweet and baby corn had the highest recall of corn types.



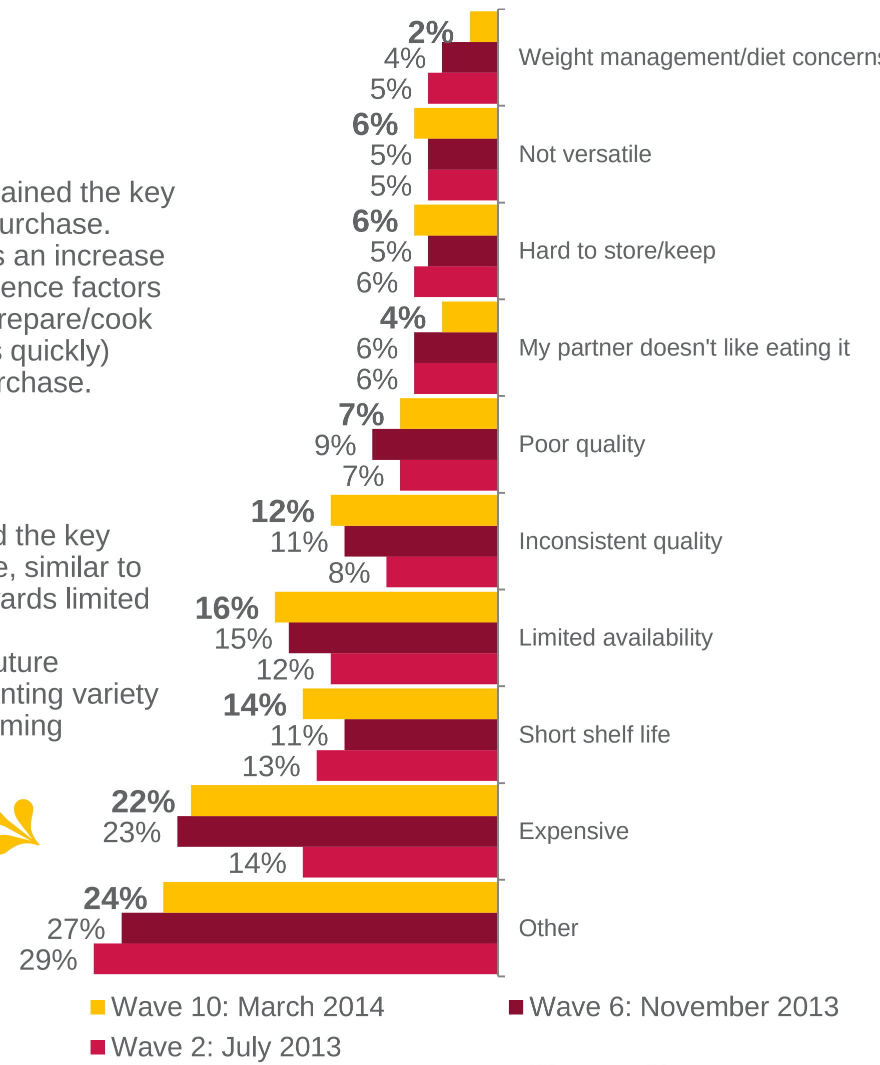
Q6a. What varieties of <commodity> are you aware of? (unprompted)
Sample Wave 2 N=509, Wave 6 N=324, Wave 10 N=301

Triggers and Barriers to Purchase



Taste remained the key driver of purchase. There was an increase in convenience factors (easy to prepare/cook and cooks quickly) driving purchase.

Expense remained the key barrier to purchase, similar to Wave 6.Trend towards limited availability.
Other barriers to future purchase were wanting variety in diets and consuming enough for needs.



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?
Sample Wave 2 N=509, Wave 6 N=324, Wave 10 N=301

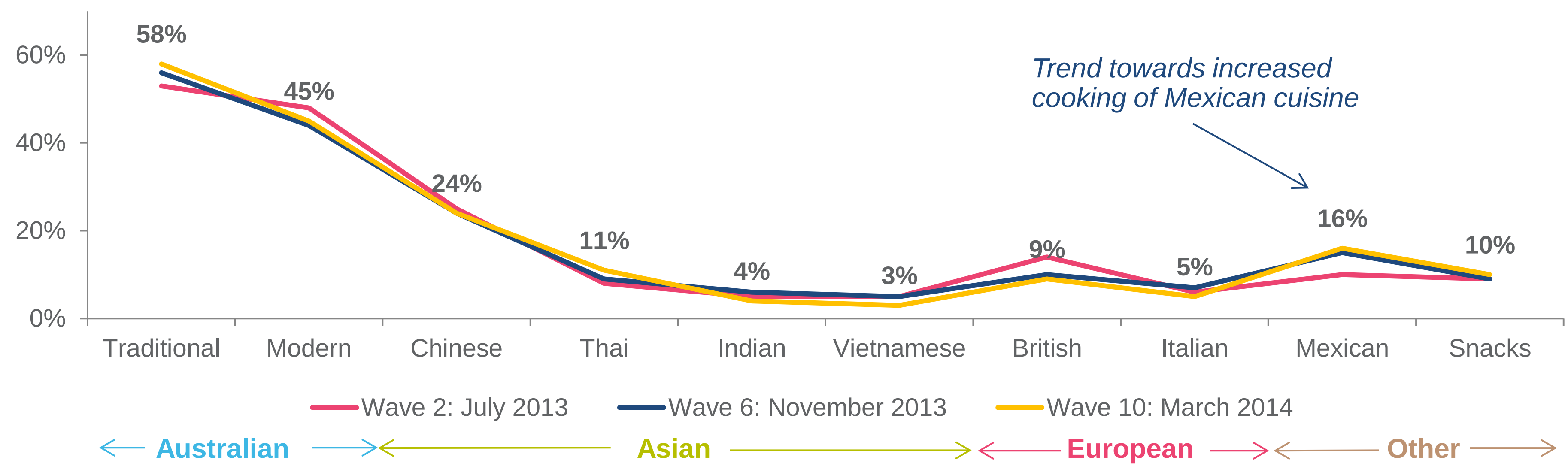
Cooking Cuisine and Occasions

- Australian cuisine remained the most common cuisine cooked. Sweet corn was also a popular ingredient for Asian cooking styles. Typical cuisines cooked remained relatively consistent between waves.
- Dinner was the typical consumption occasion, with over half of consumers eating sweet corn for weekday dinner, most likely due to convenience factors.

Wave 10 Top 5 Consumption Occasions

Weekday dinner	54%	▲ Wave 2	▼ Wave 6
Weekend dinner	34%	— Wave 2	▲ Wave 6
Family meals	36%	▼ Wave 2	▼ Wave 6
Every-day meals	27%	▼ Wave 2	— Wave 6
Quick meals	28%	▼ Wave 2	▼ Wave 6

Typical Cuisine Cooked



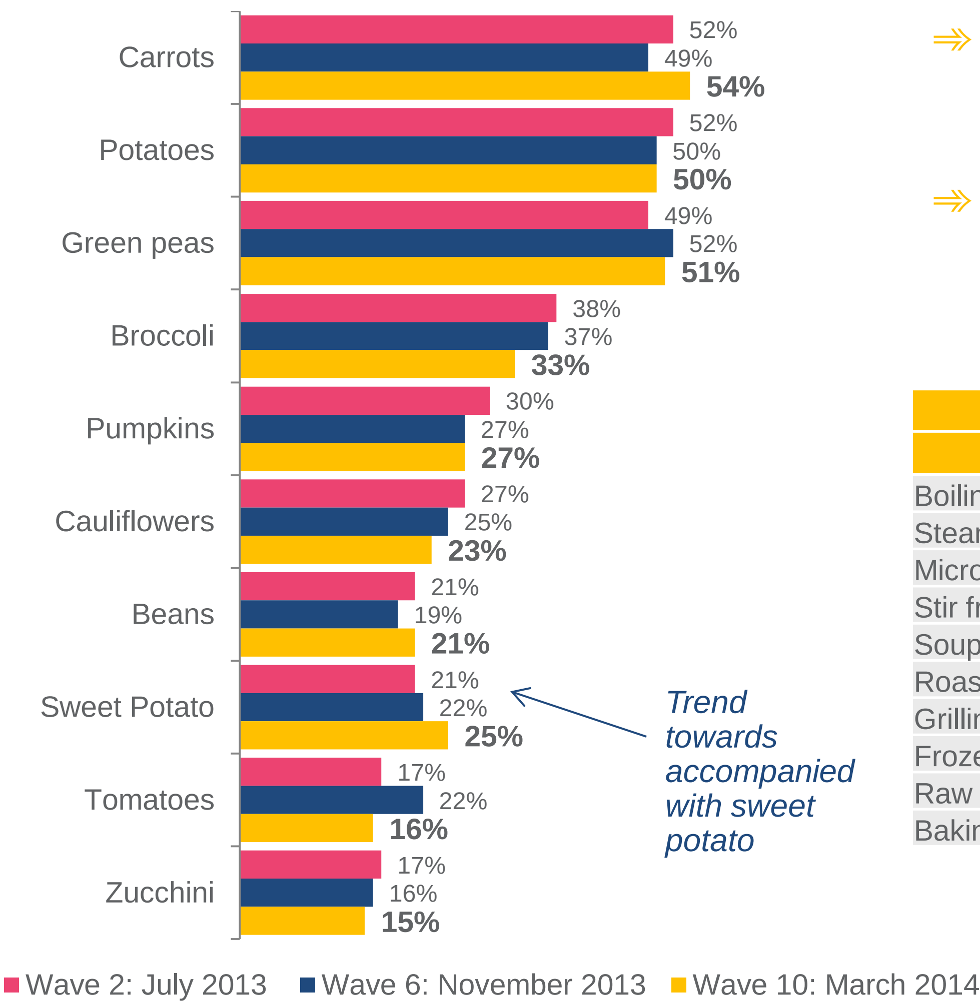
Sample Wave 2 N=509, Wave 6 N=324, Wave 10 N=301
Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?

colmar brunton.

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

Cooking Preferences

Top 10 Accompanying Vegetables



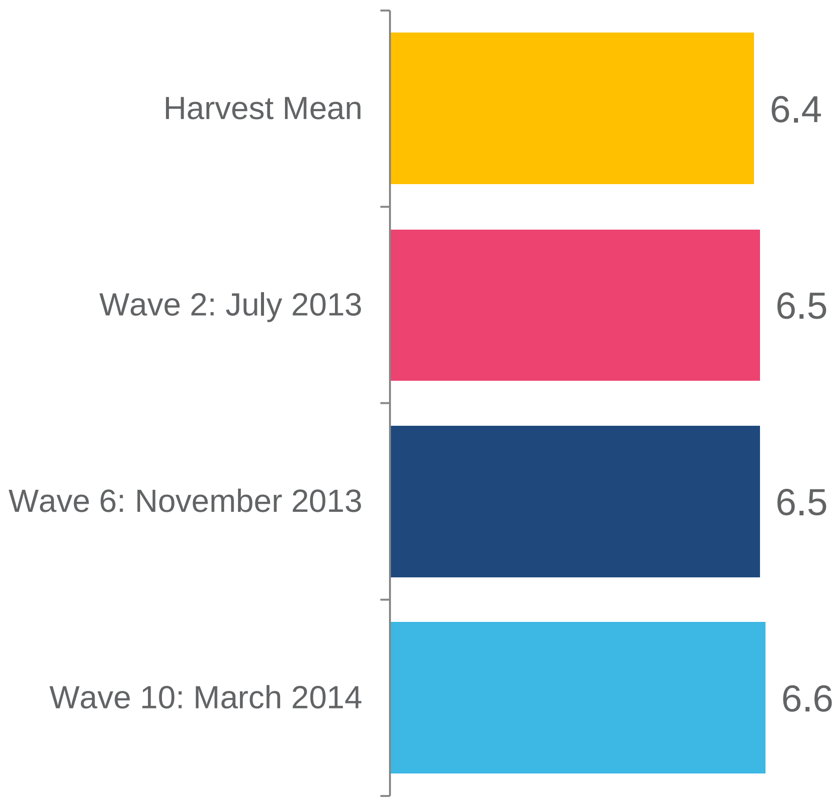
- Corn was typically served with carrots, potatoes and green peas, which was on trend with previous waves.
- Approximately one half of consumers boiled corn, with steaming and microwaving also popular cooking styles.

Top 10 Cooking Styles			
	Wave 2	Wave 6	Wave 10
Boiling	56%	54%	51%
Steaming	41%	41%	42%
Microwave	29%	33%	30%
Stir frying	17%	16%	14%
Soup	12%	13%	11%
Roasting	11%	10%	9%
Grilling	8%	12%	10%
Frozen	6%	5%	5%
Raw	5%	7%	5%
Baking	5%	6%	3%

Sample Wave 2 N=509, Wave 6 N=324, Wave 10 N=301
Q9. How do you typically cook <commodity>?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?

Importance of Provenance

- Importance of sweet corn provenance was high, which was consistent over time.



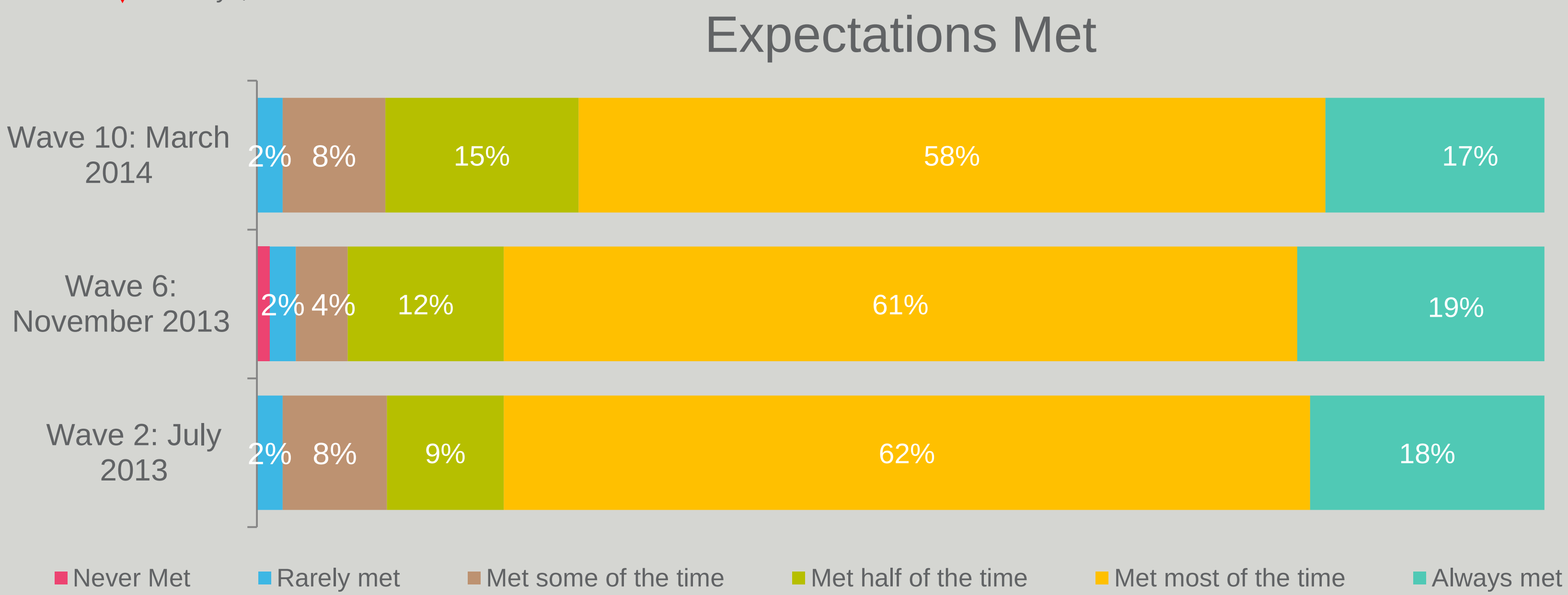
Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 2 N=509, Wave 6 N=324, Wave 10 N=301

Freshness and Longevity

Expected to stay fresh for **7.7** days

▼ 7.6 days, Wave 2
▼ 7.6 days, Wave 6

- Sweet corn was expected to stay fresh for one week. This was in line with previous months.
- In contrast, there was a trend towards decreased freshness expectations being met compared with November and July waves. More consumers indicated that freshness was only met half the time.



Sample Wave 2 N=509, Wave 6 N=324, Wave 10 N=301
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> ?

colmar brunton.

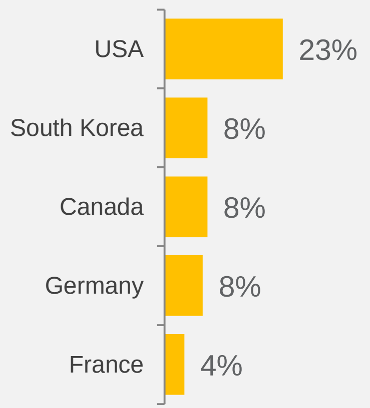
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Trends:
Sweet Corn

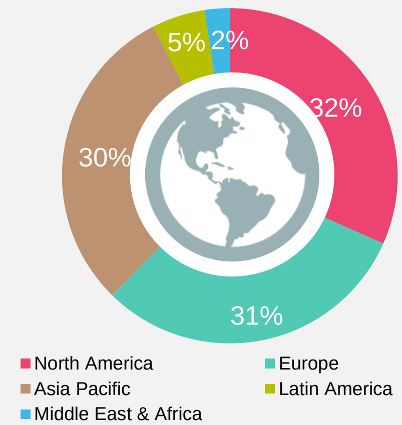
Sweet Corn Global NPDs
November – February 2013/14

There were 332 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 snacks, bakery goods and meals.

Country

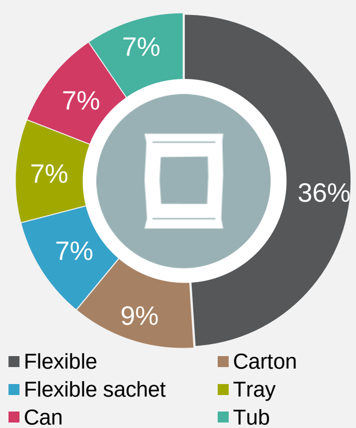


Region



332 Global NPDs

Top Pack Formats



Categories

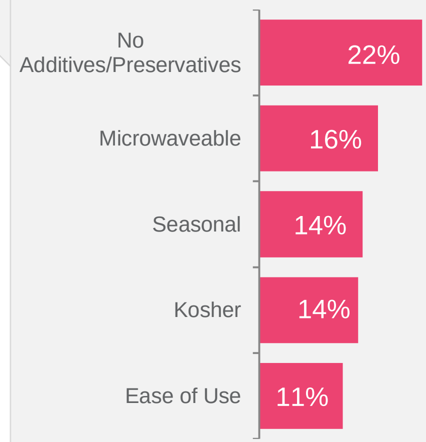
Snacks 21%

Bakery 13%

Meals 11%

Fruit & Vegetables 7%

Top Claims



Sweet Corn Product Launches:
Last 3 Months (November – February 2013/14)
Summary

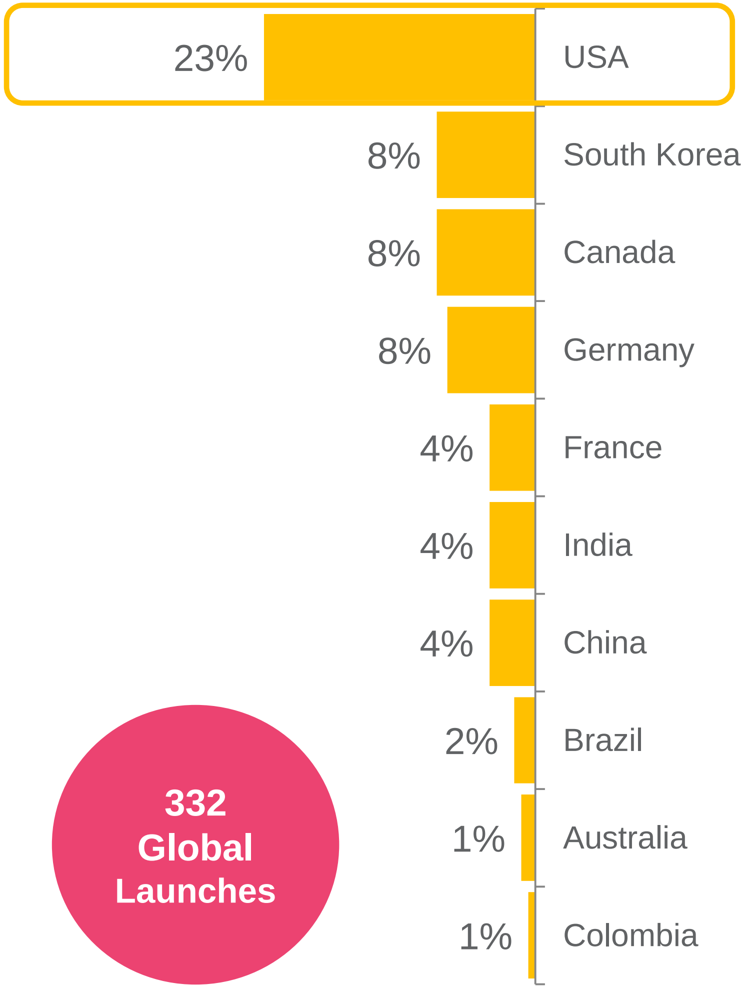
- There were 332 products launched in the last 3 months globally that contained sweet corn as an ingredient. This is higher than the 296 global launches in Wave 6. There were only 4 launches for products in Australia in the last 3 months.
- North America (32%), Europe (31%) and Asia Pacific (30%) were the top regions for launches.
- Flexible packaging remains as the most common pack format used for new launches (36%).
- The top categories for launches were snacks (21%), bakery goods (13%) and meals (11%), these 3 categories were consistent with all previous waves tracked.
- The core claims used globally were no additives/preservatives (22%), microwaveable (16%) and seasonal (14%).
- The most innovative products launched were chocolate bars with corn embedded & corn and mayonnaise bread. Examples of these can be found in the following pages.

Source: Mintel (2014)

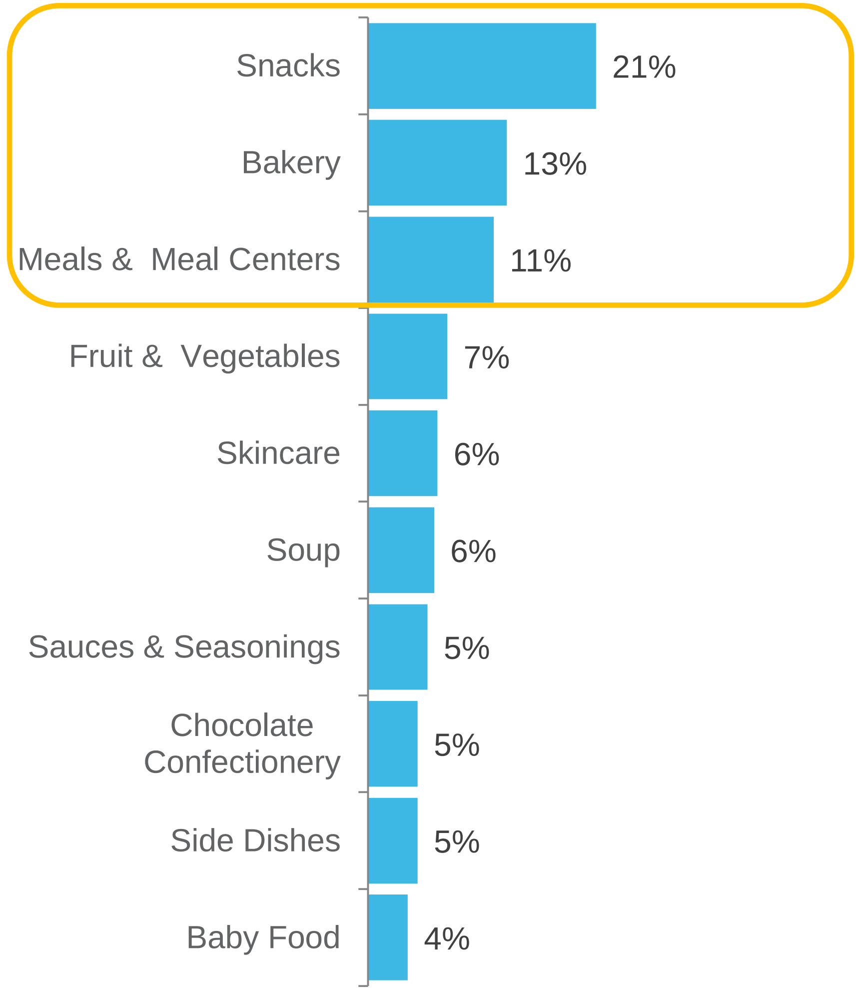
Sweet Corn SKUs
Country, Region & Categories

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

Top 10 Launch Countries



Top 10 Launch Categories



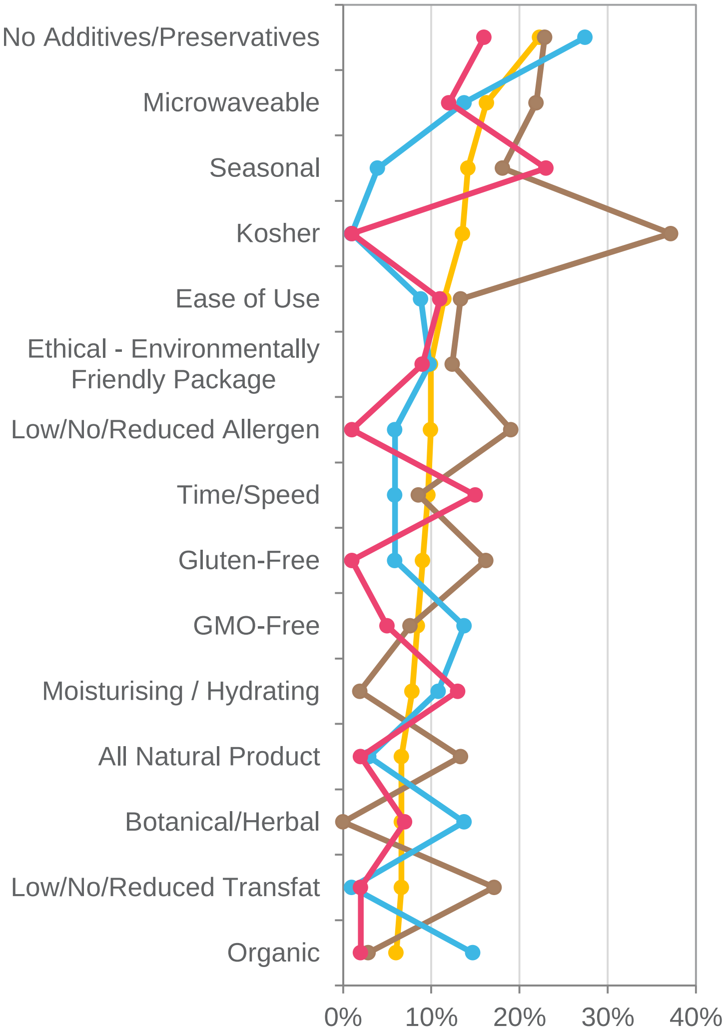
Number of Global Sweet Corn NPD for the L3M N=332

Sweet Corn Launches

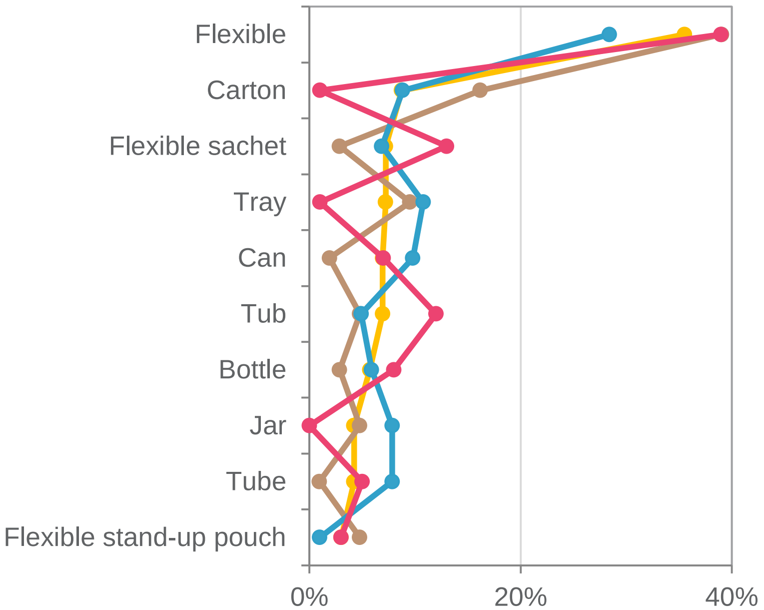
Top Claims & Pack Formats Used

- The top claims used for products launched were no additives/preservatives, microwaveable and seasonal. Kosher claims were popular in North America, consistent with previous waves.
- The top pack formats used for launches were flexible packaging, cartons and flexi sachets.

Top Claims Used



Top Packs Used



Total Sample (N=332)
North America (N=105)
Europe (N=102)
Asia Pacific (N=100)

Number of Global Sweet Corn NPD for the L3M N=332
Only regions with n >30 are displayed

Innovative Sweet Corn Launches:
L3M (November – February 2013/14)

Alpine Milk Chocolate with Crunchy Lightly Salted Snacking Corn (Germany)

Contains 100% Alpine milk, is only available for a limited period and retails in a 100g pack. The pack features the National Park Hohe Tauern logo which signifies that the production comes from renewable energy.

Claims:
Ethical - Environmentally Friendly Product, Limited Edition

CU Sweet Popcorn (South Korea)

Snacks Sweet Popcorn features mild and light corn flavour. It retails in a 112g pack.

Claims:
Halal, Social Media

Popcorn Prawns with Sweet Chilli Sauce (Poland)

The product retails in a 230g pack including 200g of shrimps and 30g of dipping sauce.

Claims:
No information available

Godrej Tyson Real Good Yummiez Chatpata Masala Corn (India)

Godrej Tyson Real Good Yummiez Chatpata Masala Corn is ready to use. This vegetarian, microwaveable product is tender and juicy and retails in a 500g convenient quick-frozen and freshness-sealed pack including a chatpata masala sachet inside.

Claims:
Ease of Use, Convenient Packaging, Vegetarian, Microwaveable

Source: Mintel (2014)

Innovative Sweet Corn Launches:
L3M (November – February 2013/14)

Aqli Mini Pizza (China)

Aqli Mi Ni Bi Sa (Mini Pizza) comprises of sausage, and roasted chicken varieties. This microwavable product retails in a 118g pack containing one 58g sausage pizza and one 60g roasted chicken pizza.

Claims:
Microwaveable

7 Select Conch Shaped Snack (South Korea)

7 Select Conch Shaped Snack has been fried using sunflower oil to provide crispier texture. The product retails in a 64g pack.

Claims:
No information available

Changbanpo Corn Syrup (China)

Changbanpo Yu Mi Jiang (Corn Syrup) has been repackaged. The product retails in a newly designed 1.25L pack.

Claims:
No information available

Feurich Cheese Flavoured Corn Rings (Spain)

Feurich Snack de Maíz con Sabor a Queso (Cheese Flavoured Corn Rings) are now available. The product retails in 130g pack.

Claims:
No information available

Source: Mintel (2014)

Innovative Sweet Corn Launches:
L3M (November – February 2013/14)

Tohato Caramel Corn FlakeCort Custard Cream Flavour Corn Snack (Japan)

Is a corn snack coated in white chocolate and flakes. It has crispy texture on the outer layer and soft, luxurious texture in the inner layer. It is made with GMO-free corn snack and retails in a 45g pack.

Claims:
GMO-Free

Gu Wu U Pin Jujube and Corn Juice (China)

Gu Wu U Pin Hong Zao Yu Mi Zhi (Jujube Corn Juice) is not made from concentrated juice, and is free from added preservatives. This halal certified product is rich in dietary fiber and available in a 280ml pack.

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

Premium White Chocolate with Cornflakes (Portugal)

Is made with UTZ certified cocoa. This product retails in a 100g pack.

Claims:
Premium, Ethical - Environmentally Friendly Product, Ethical - Human

Minori Bakery Shakitto Corn and Mayonnaise Bread (Japan)

Minori Bakery Shakitto Corn and Mayonnaise Bread is made with Hagoromo Shakitto brand corn. It features a fun texture of corn.

Claims:
Cobranded, Microwaveable

Source: Mintel (2014)

Australian Sweet Corn Launches:
L3M (November – February 2013/14)

Lee Kum Kee Ready Sauce for San Choy Bao

Lee Kum Kee Ready Sauce for San Choy Bao is said to create an authentic Asian meal in minutes. This quick and easy product just requires the addition of pork, water chestnuts, carrots and lettuce leaves. It retails in a 100g pack featuring the cooking instructions and serving four portions.

Claims:
Ease of Use, Time/Speed

Coles Mexican Style Tuna

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

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

Milka & Oreo Alpine Milk Chocolate with Oreo Biscuit Filling

Milka & Oreo Alpine Milk Chocolate with Oreo Biscuit Filling is now available. The product is made with 100% Alpine milk and retails in a 100g pack.

Claims:
Cobranded

Coles Tuna, Sweetcorn & Mayonnaise

Coles Tuna, Sweetcorn & Mayonnaise is dolphin friendly. The product retails in a 95g recyclable can bearing the endorsement of the Australian National Heart Foundation.

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

Source: Mintel (2014)

In the Media.

General Vegetable News (January – March 2014)

- Tamworth farmer highlights the difficulties of selling produce to local retailers and channels, indicating 90% of his produce leaves the local area. However similar produce is being brought in from interstate and sold at mainstream retailers.

- Japan Free Trade Agreement was signed off in early April 2014. Currently, Japan is Australia's second biggest horticulture export market. The vegetables that will see immediate reduced tariffs are carrot, asparagus and cabbage. However, there is potential for other commodities tariffs to be reduced in the future.

- Concern raised over Melbourne's wholesale fresh produce market development that it will be too small, too far out from the city and will not meet grower expectations.

Source: www.abc.net.au/news/rural/industry/vegetables/

Commodity News

(January – March 2014)

- There are two categories of peas:

1. Snap peas/ Snow peas, where the whole pea pod is used
2. English peas /Green peas, where the outer shells are split and the peas are shelled

(www.pennlive.com/cooking)

- China is expanding its corn import trade. Last year alone China imported 2.5 million tonnes of corn and corn bi-products from USA.

(www.usa.chinadaily.com.cn)

- NASA is planning on growing lettuce at the International Space Station by sending the largest ever plant growth chamber into space.

(www.timesofindia.com)

- Broccoli has more nutrients than any other vegetable, being high in fibre and full of antioxidants.

(www.goerie.com)

Thanks.