Horticulture Australia and AUSVEG.

VG12078 Project Harvest.

Monthly Tracker Report Wave 12 May 2014: Asian Vegetables, Baby Spinach, Brussels Sprouts & Capsicums

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colmar brunton.

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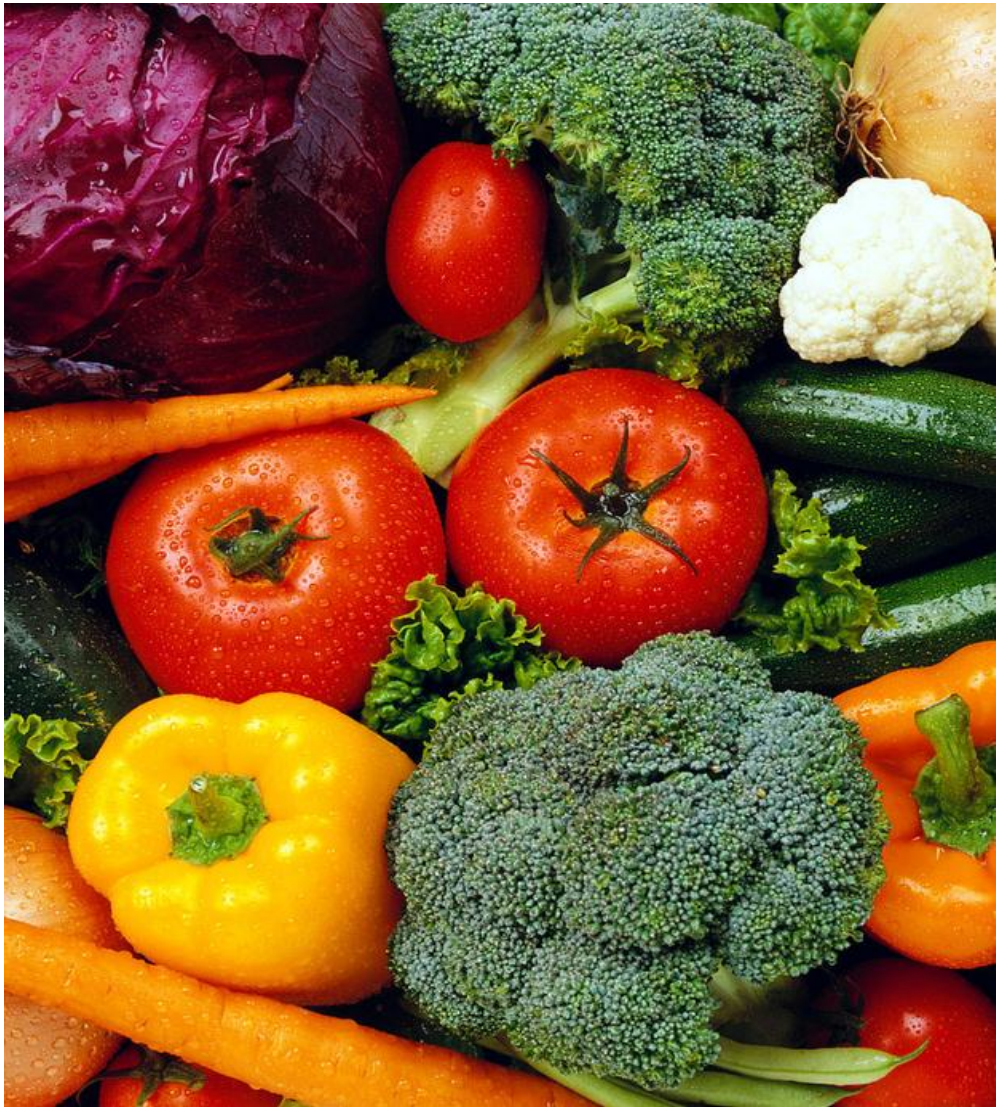
Background & Methodology.

Background & Setting the Scene.



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

Colmar Brunton has been commissioned to conduct a monthly online 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.

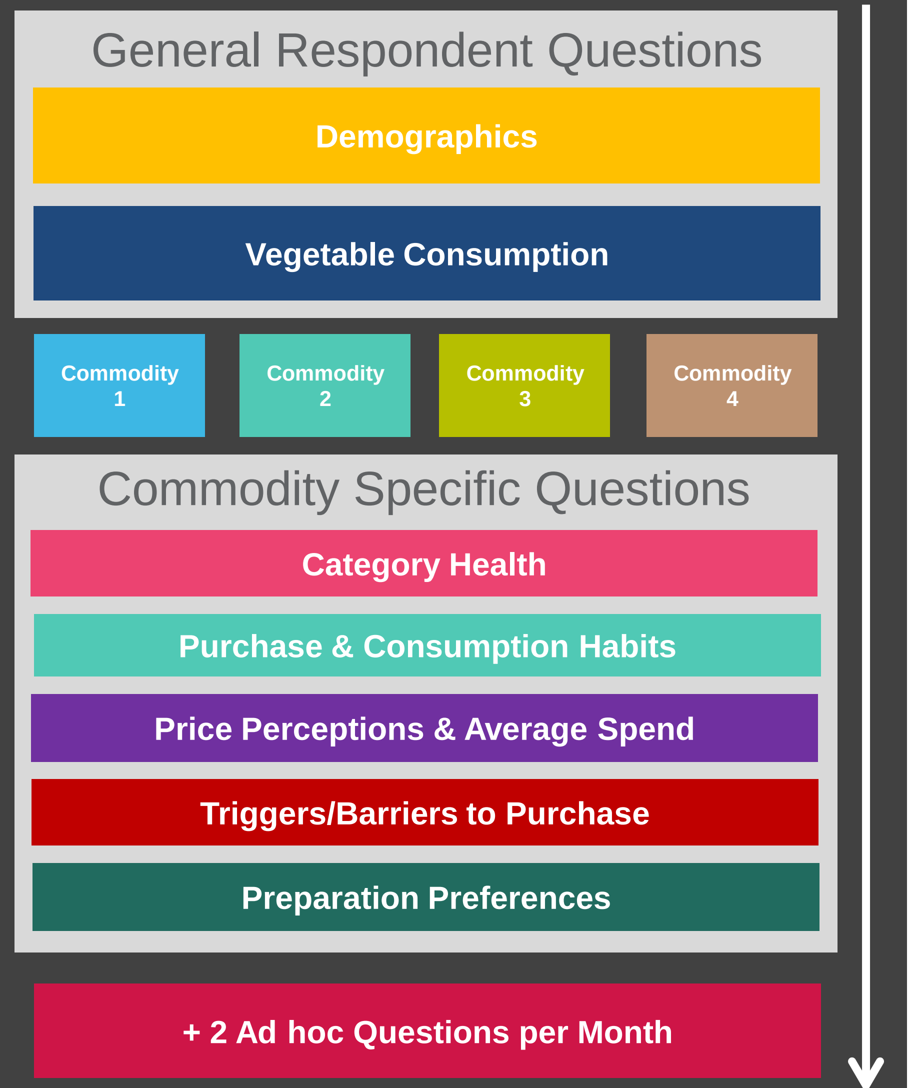
This wave's report (Wave 12, May 2014) focuses on:

- Asian Vegetables
- Baby Spinach
- Brussels Sprouts
- Capsicums

Essentially this is the third wave of tracking for these specific commodities, and as such, the current report will bring to light any change over the past eight months.

Online Methodology.

- Respondents were recruited via an Online Panel. If the respondents met the recruitment requirements of sufficient vegetable consumption (monthly) they were asked to complete the online questionnaire.
- All respondents completed general demographic and consumption questions. If respondents purchased any of the specific commodities within the last month they would complete those questions. A minimum of N=500 respondents completed the questionnaire.
- Topics covered in the questionnaire were vegetable purchase and consumption, category health, price and value perceptions, triggers and barriers to purchase and preparation and cooking preferences.
- An additional 2 ad-hoc questions are asked at the end of the questionnaire. The subjects of these questions are supplied by Horticulture Australia prior to each month to get feedback on topics of interest at that time.
- The questionnaire took 15 minutes to complete.
- Questions asked appear on the bottom of each page of this report. Unless stated otherwise, all scales were 0 - 10 scales, with higher scores indicating greater agreement/liking/importance etc.



Sample.

In total, 635 respondents completed the questionnaire. Respondents represented most states and territories, as well as both metro and rural areas.

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

To qualify for the questionnaire, respondents...

⇛Were aged 18 years and over

⇛Purchased fresh vegetables at least once a month

⇛Purchased at least one of the monthly commodities (Asian Vegetables, Baby Spinach, Brussels Sprouts & Capsicum) within the last month

⇛Were the main or joint grocery buyer

	Total N=635	Asian Vegetables n=313	Baby Spinach n=300	Brussels Sprouts n=293	Capsicum n=313
Gender					
Male	29%	30%	26%	31%	28%
Female	71%	70%	74%	69%	72%
Age					
18-24 y.o.	7%	8%	6%	6%	5%
25-34 y.o.	20%	21%	25%	13%	22%
35-44 y.o.	19%	20%	20%	18%	21%
45-54 y.o.	18%	18%	19%	19%	19%
55-64 y.o.	20%	23%	17%	21%	19%
65+ y.o.	16%	10%	13%	23%	15%
Household					
Single Income no Kids	19%	21%	16%	20%	15%
Double Income no Kids	21%	20%	23%	19%	21%
Young Families	15%	14%	18%	12%	18%
Established Families	22%5	28%	27%	25%	27%
Empty Nesters	20%	17%	17%	24%	19%
Location					
New South Wales	21%	23%	14%	23%	16%
Victoria	19%	20%	15%	24%	16%
South Australia	16%	16%	21%	14%	22%
Queensland	18%	13%	18%	21%	15%
Western Australia	17%	19%	21%	12%	19%
Tasmania	5%	4%	7%	5%	7%
Australian Capital Territory	3%	4%	5%	2%	5%

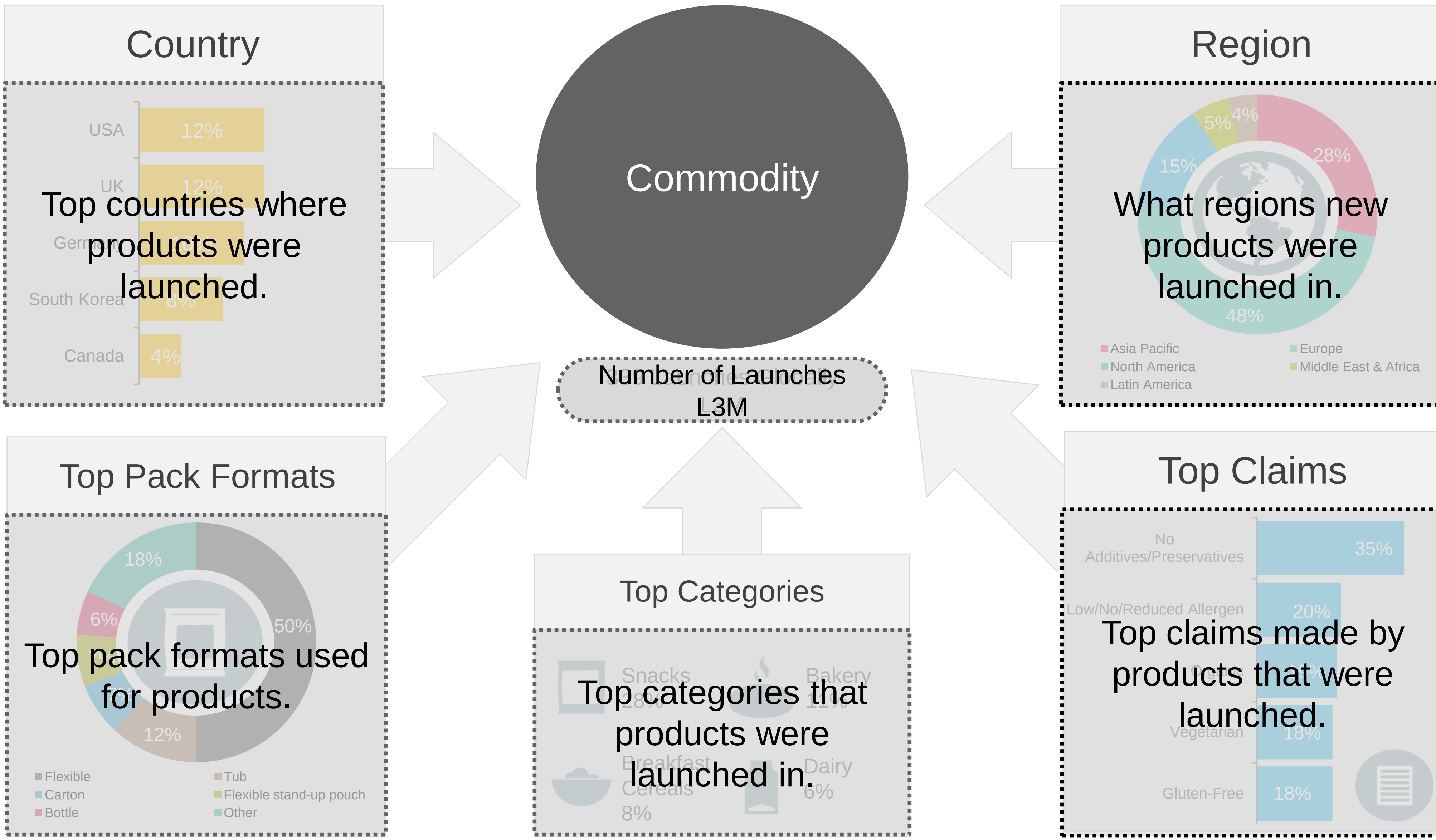
Trends Research: Our Approach

- Colmar Brunton has used a combination of both desk research and in the field market research to explore the trends of each vegetable commodity being tracked this month.
- Our main source of secondary data for this report was collected from Mintel Global New Products Database (GNPD).
- This data source is used to analyse products launched around the globe in the last 3 months (L3M) that contained each vegetable being tracked as a core ingredient.
- Trends are determined at a global and regional level.
- Claims and pack types used for the launched products are explored and the relevant product categories are determined. Specific examples of products being launched around the globe that are particularly innovative are displayed for reference.
- Trend reports are provided monthly and will reflect the 4 commodities tracked in the preceding period.

Product Launches Last 3 Months (L3M)

How to Read Summaries

See below for the format that will be used to summarise the trend data collected for each commodity.



Wave 12:
Executive Summary

Asian Vegetable Grower Action Plan

26% Consumers indicated they were likely to increase their purchase of Asian Vegetables in the future.

1.

Insight:

Although awareness of differing Asian vegetables has increased over the year, lack of knowledge of how to cook remains a key barrier to purchase.

Recommendation:

Consumer education program, highlighting different types and how to cook to ensure future growth of the category.

2.

Insight:

Perceptions of short shelf life is a key factor in discouraging purchase.

Recommendation:

Optimisation of supply chain to maximise freshness, and educating consumers on correct storage techniques specific for Asian vegetables to maximise shelf life.

3.

Insight:

Expectations of freshness were less likely to be met in warmer months.

Recommendation:

Explore innovation that maintains consistent freshness of the product across seasons.

Baby Spinach Grower Action Plan

Baby spinach is increasingly being purchased from markets and independent supermarkets.

1.

Insight:

Varietal awareness remains low, with consumers purchasing on visual appeal.

Recommendation:

Presentation of baby spinach is of high importance. Ensure leaf damage is minimised and explore quality control options to regularly removed damaged leaves from display.

2.

Insight:

Increased purchase from independent retailers and markets.

Recommendation:

Growers should explore greater farm to gate sale opportunities.

3.

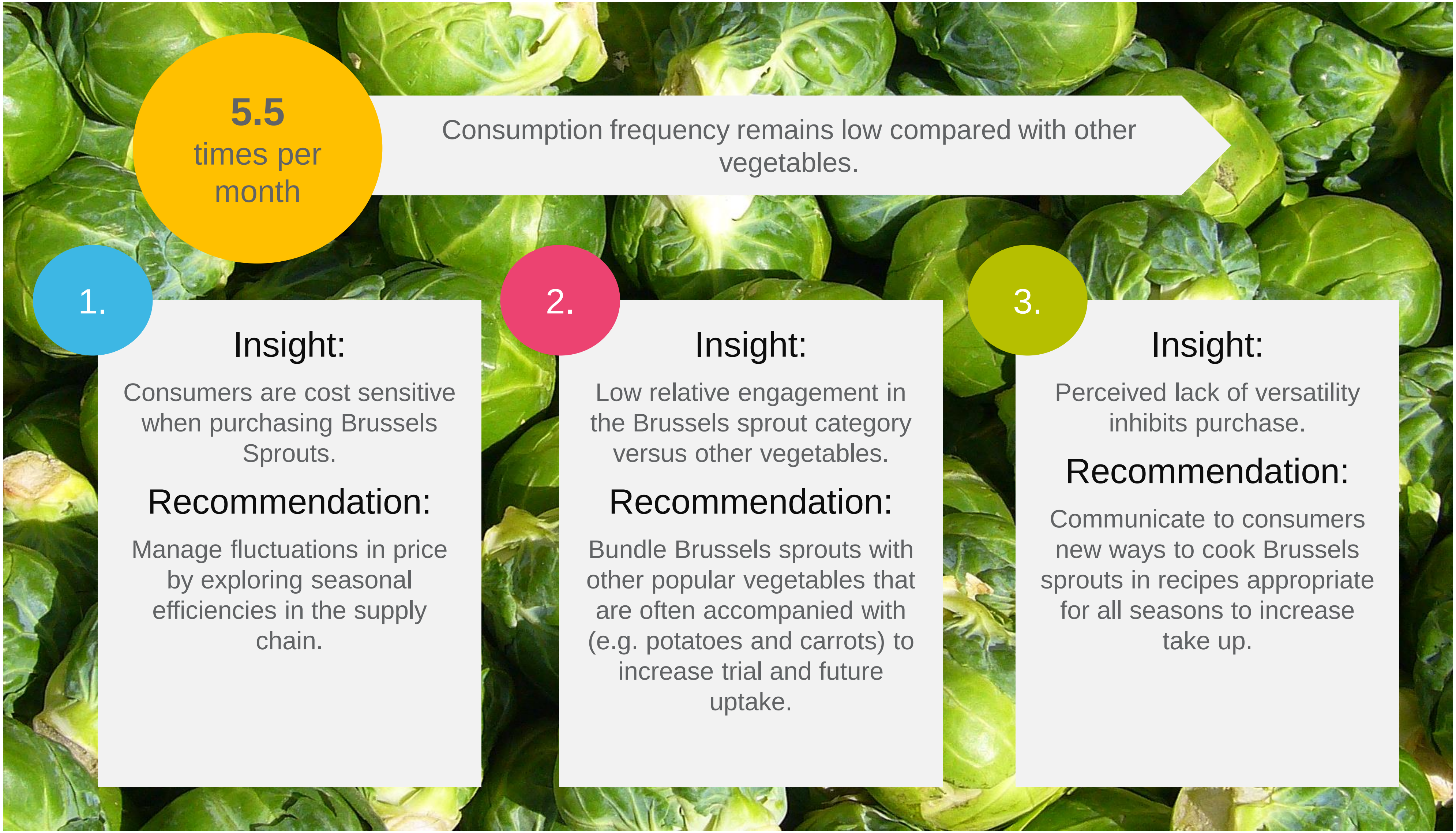
Insight:

Worldwide innovation in baby spinach is low.

Recommendation:

An opportunity exists for Australia to become a world leader in baby spinach innovation. Continue to consider new delivery formats for baby spinach.

Brussels Sprouts Grower Action Plan



5.5 times per month

Consumption frequency remains low compared with other vegetables.

1.

Insight:

Consumers are cost sensitive when purchasing Brussels Sprouts.

Recommendation:

Manage fluctuations in price by exploring seasonal efficiencies in the supply chain.

2.

Insight:

Low relative engagement in the Brussels sprout category versus other vegetables.

Recommendation:

Bundle Brussels sprouts with other popular vegetables that are often accompanied with (e.g. potatoes and carrots) to increase trial and future uptake.

3.

Insight:

Perceived lack of versatility inhibits purchase.

Recommendation:

Communicate to consumers new ways to cook Brussels sprouts in recipes appropriate for all seasons to increase take up.

Capsicum Grower Action Plan

Consumers' perceived value for money has decreased across the three waves.

1.

Insight:

Expense as a barrier to purchase had directionally increased across the three tracks.

Recommendation:

Consumer perceptions do not align with pricing analysis. Future research is suggested to understand what drives consumers perception of expense and value for money.

2.

Insight:

Consumers regard capsicum as an important vegetable, however no increase in purchase has been apparent across the year.

Recommendation:

Further innovation of capsicum products in the Australian market to drive increased purchase across a variety of categories (not just meals).

3.

Insight:

Colour was a key trigger to purchase.

Recommendation:

Educate consumers on further sensory attributes such as taste differences to drive increased use as a flavour ingredient in meals where colour aesthetics are less relevant.

Wave 12: Fact Base
(1 of 2)

Asian Vegetables:

- Asian vegetables had relatively high levels of importance, endorsement and interest in new types. However, satisfaction was lower than the Harvest mean of commodities tracked.
- Purchase of Asian vegetables occurred 4.6 times per month and was consumed on average 8.0 times per month, which was the lowest frequencies of previous waves tracked.
- Overall, Asian vegetables were perceived to be good value for money. Consumers on average purchase 900g of Asian vegetables per shop which was consistent with previous waves. Average recalled last spend was $6.00, slightly higher than previous waves.
- Price tracking for May 2014 revealed that pricing was relatively consistent across states and retailers/ Average national price was $2.17 per bunch of pak choy.
- Buk Choy was the most recalled type of Asian vegetable, followed by choy sum and wombok. Awareness had directionally increased over the three waves.
- Asian vegetables were expected to stay fresh for 6 days, and freshness expectations were met most of the time.
- Top triggers for purchase were being easy to cook with, healthy and to use as an ingredient in dishes.

Baby Spinach:

- Baby spinach scored well on perceived importance, however was comparable to all commodities tracked thus far.
- Purchase of Baby spinach occurred 4.3 times per month and was consumed on average 9.8 times per month. This is an increase from Wave 4 and Wave 8 (9.3 and 9.7 respectively).
- Overall, Baby spinach was perceived to be fairly good value for money, however this perception has fallen slightly in Wave 12.
- Consumers on average purchase 0.4kg of baby spinach, typically in the format of pre-packed small bags. Recalled last spend was $3.90, slightly higher from the previous waves.
- Price tracking for May 2014 revealed that pricing had increased slightly due to less promotional activity.
- 85% of respondents could not name any types of baby spinach.
- Baby spinach was expected to stay fresh for 5.6 days, which was usually met most of the time.
- Top triggers for purchase remained the same (health/nutrition, easy to cook with), however Wave 12 saw a reduction in ‘Short shelf life’ as a barrier, which could be explained by cooler weather in May.

Wave 12: Fact Base
(2 of 2)

Brussels Sprouts:

- Brussels Sprouts had lower levels of importance, satisfaction and endorsement than other commodities tracked thus far.
- Purchase of Brussels Sprouts occurred 2.9 times per month and was consumed on average 5.5 times per month, which the was directionally lower than previous months.
- Overall, Brussels Sprouts were perceived to be fair value for money. Consumers on average purchase 600g of Brussels sprouts, typically in the format of individual sprouts. Recalled last spend was $3.70., slightly higher than January 2014.
- Price tracking for May 2014 revealed variation across states and stores, with the average price being $7.48 per kilo and the retail price range $9.00.
- Over 90% of respondents could not name any types of Brussels Sprouts. Very low awareness was consistent with previous waves.
- Brussels Sprouts were expected to stay fresh for 8 days, which was met most or all of the time, with a trend towards all of the time.
- Top triggers for purchase were health and taste. Key barriers to purchase were expense and limited availability.

Capsicum:

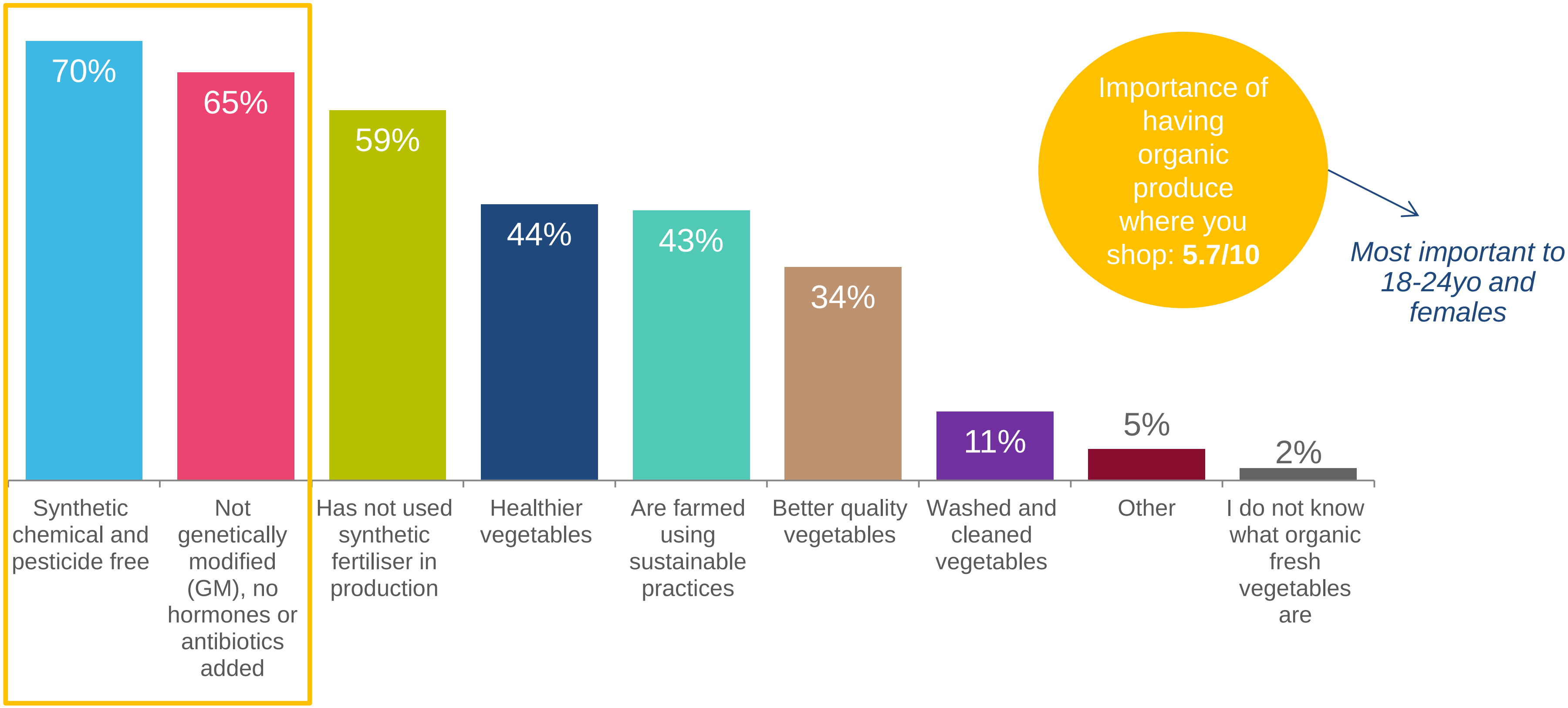
- Capsicum had a high level of importance to consumers, and had strong consumer sentiment across other measures. The majority of consumers indicated that they would purchase the same amount in the future.
- Purchase of capsicums occurred 4.2 times per month and was consumed on average 10.5 times per month, consistent across the three waves.
- Overall, capsicums were perceived to be fair value for money, which had directionally decreased across waves. Consumers on average purchase 600g of capsicums, typically in the format of individual capsicums. The average recalled last spend was $3.90.
- Price tracking for May 2014 revealed relatively consistent prices across states and retailers, with the average price of a green capsicum being $5.71 per kilo and the price range was $3.00.
- 50% of respondents were unable to recall a type of capsicum and those that could were naming by colour, rather than type.
- Capsicums were expected to stay fresh for 8 days, which was consistent with previous waves.
- Top trigger for purchase were their colour, as well as being easy to use as an ingredient in dishes.1

Wave 12:
Ad-Hoc Questions

Additional Monthly Questions Asked

Organic Vegetables

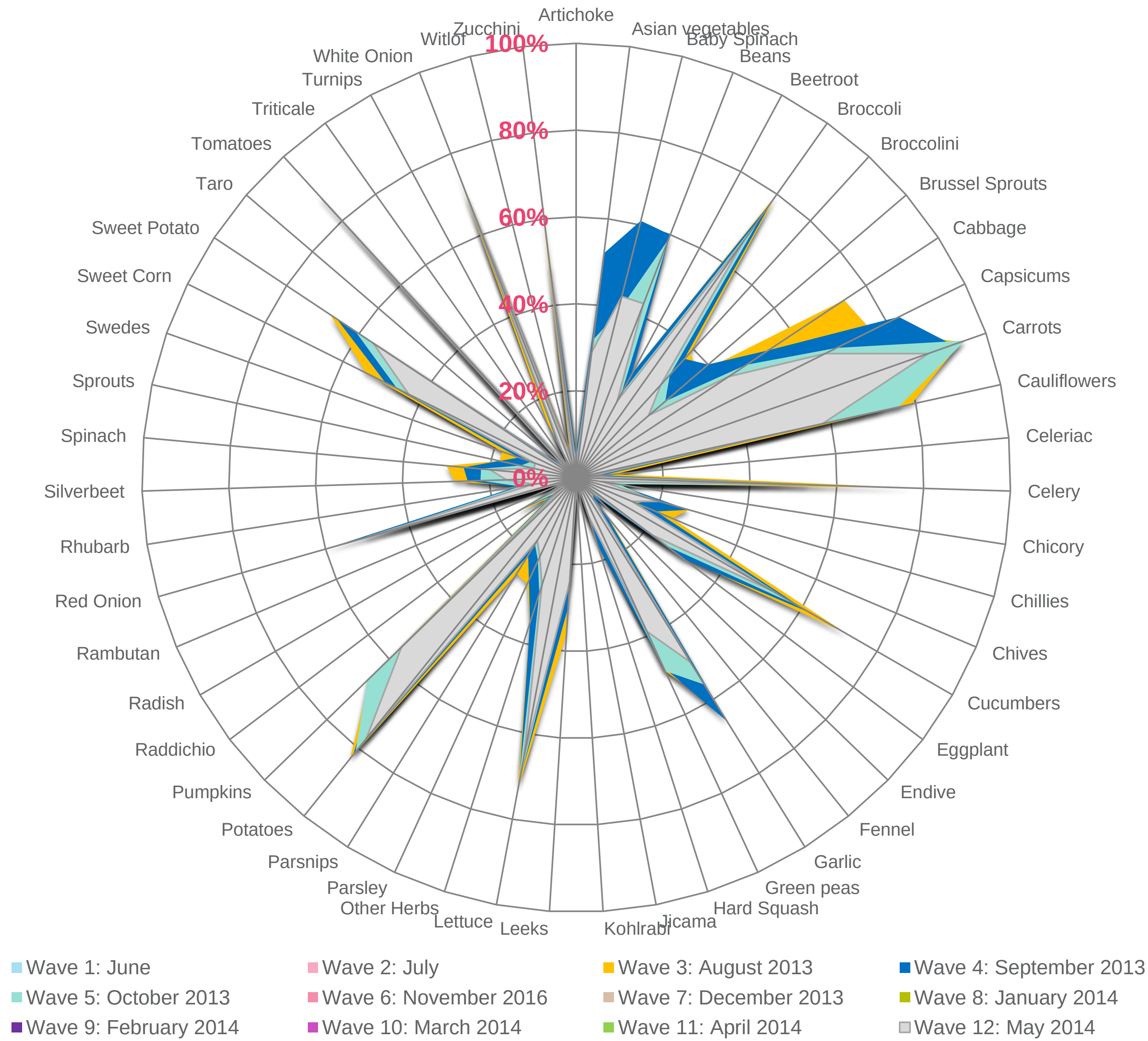
- The majority of consumers perceive that organic vegetables are not altered synthetically and genetically with pesticides, hormones or antibiotics.
- Only a third of respondents perceive organic vegetables to be better quality than non-organic vegetables. Overall, having organic produce available where consumers shop is only fairly important and for the majority not an important factor in where they shop.



AHQ1 What do organic fresh vegetables mean to you?
AHQ2. How important to you is having a range of organic fresh vegetables available where you regularly shop?
N=635

Wave 12: Overall Vegetable Tracking

Vegetables Purchased Last Month



- This month's vegetable purchase was in line with recent months. However, earlier months of the tracker had the largest vegetable purchase.
- The most purchased vegetables in the current wave were tomatoes, carrots, potatoes and onions, which was consistent with previous months.

Sample N= Wave 2178

S8. Which of the following fresh vegetables have you purchased in the last month?

Category Health Explained

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

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

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

Category Health

- Baby Spinach and Capsicum had high levels of endorsement, indicating consumers' likeliness recommend. However, increased purchase of Capsicum was lower than the Harvest average.
- Asian Vegetables had a very high level of importance, which has been consistent over the three waves of tracking. The commodity has the equal highest level of importance for all commodities tracked in the past 12 months. Consumers are highly engaged with the commodity and there is strong interest in new varieties.
- Consumer satisfaction with Brussels Sprouts had increased since last wave and is more in line with the Harvest mean. Satisfaction would expect to increase as the tracking approaches peak season (winter). Despite relatively low consumer sentiment, there was still a strong intent to purchase.

	Asian Vegetables	Baby Spinach	Brussels Sprouts	Capsicum	Harvest Total Mean
Importance	7.3	7.0	6.1	7.1	6.3
Satisfaction	6.3	6.5	6.3	6.8	6.6
Endorsement	7.4	7.1	6.4	7.0	6.8
Interest (New Types)	7.2	6.2	6.1	6.4	6.1
Future Purchase					
More	26%	17%	17%	10%	14%
Same	73%	82%	80%	88%	85%
Less	1%	2%	3%	1%	2%

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

Asian Vegetables.

Purchase and Consumption Behaviour

Average Purchase **4.6** times per month

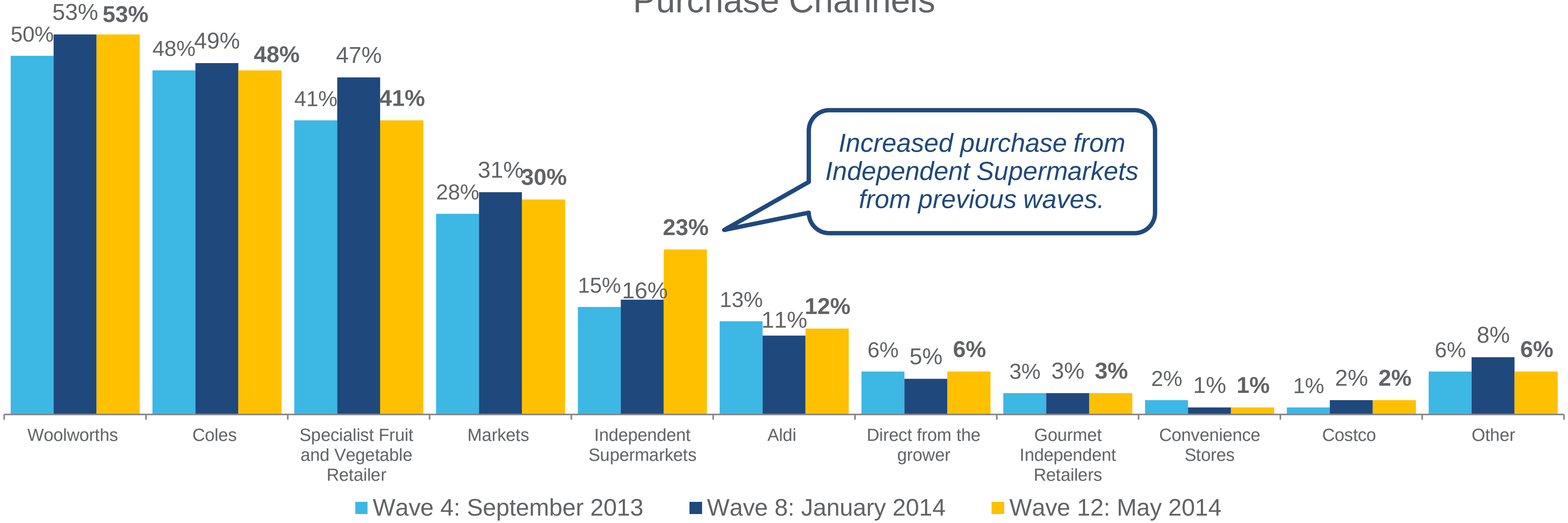
▲ 5.1 times, Wave 4
▲ 4.8 times, Wave 8

Average Consumption **8.0** times per month

▲ 8.6 times, Wave 4
▲ 8.8 times, Wave 8

- Average purchase and consumption frequency was slightly down on previous waves. However, Asian Vegetables were typically purchased once a week and consumed twice weekly across the year of tracking.
- Mainstream retailers remained the primary channel of purchase, however specialist retailers and markets were also common purchase locations.

Purchase Channels



Q1. On average, how often do you purchase <commodity>?
Q2. On average, how often do you consume <commodity>?
Q5. From which of the following channels do you typically purchase <commodity>?
Sample Wave 4, N=421, Wave 8, N=313 & Wave 12, N=305

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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 0.9kg of Asian Vegetables in May 2014. This average remained unchanged across the three waves of tracking.

- 0.9kg, Wave 4
- 0.9kg, Wave 8

Recalled last spend

The average recalled last spend was $6.00 in May, which was slightly higher than previous waves. However, there was minimal fluctuation across the three months.

- ▼ $5.60, Wave 4
- ▼ $5.70, Wave 8

Value for money

On average, consumers perceived Asian Vegetables to be good value for money (6.6/10), which was consistent with previous months.

- ▲ 6.7/10, Wave 4
- ▼ 6.5/10, Wave 8

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 typical purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 4, N=421, Wave 8, N=313 & Wave 12, N=305

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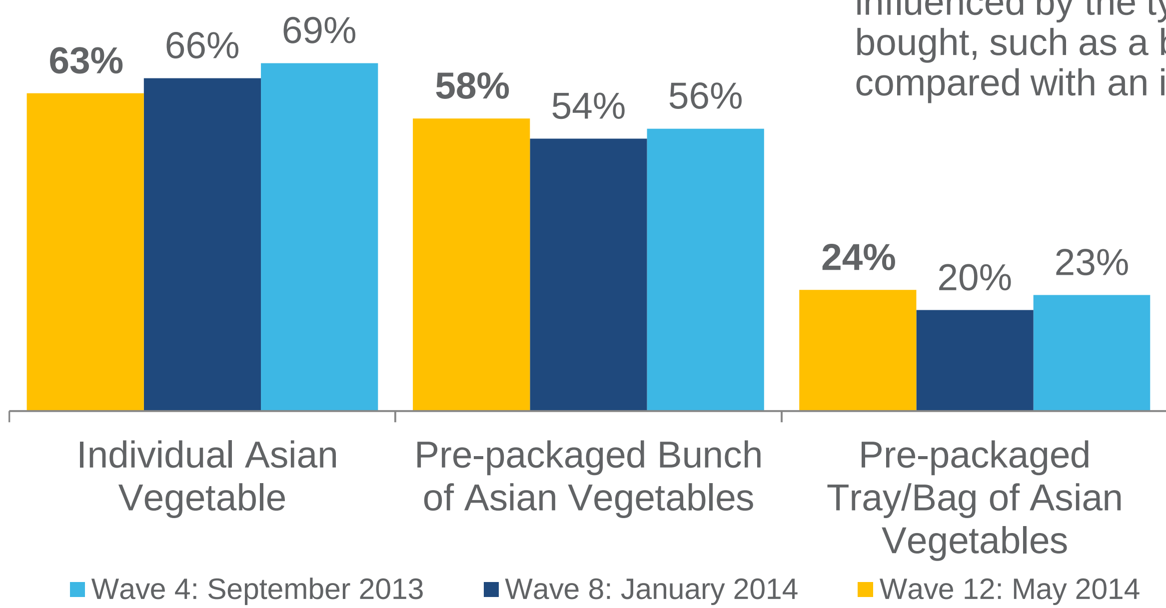
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Pack Formats Purchased



Individual and pre-packaged Asian vegetables were the most common formats purchased. This may be influenced by the type of vegetable bought, such as a bunch of pak choy compared with an individual lotus root.

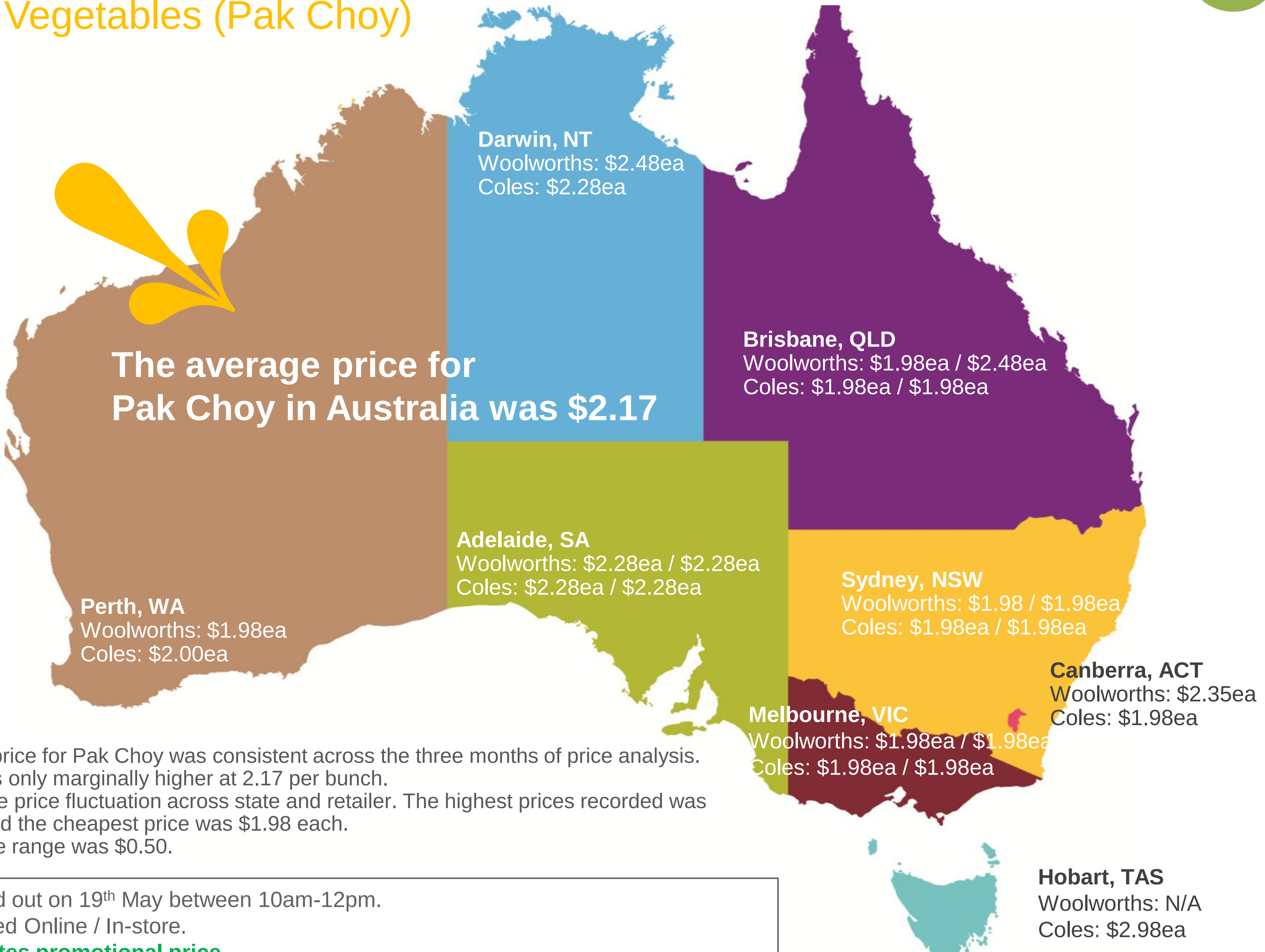
Wave 12 saw a decrease in the number of vegetables purchased per shop.

	Individual	Pre-packaged Bunch	Pre-packaged Tray
Wave 12	2.5	1.6	1.4
Wave 8	2.6	1.8	1.7
Wave 4	2.7	1.8	1.7

Sample Wave 4, N=421, Wave 8, N=313 & Wave 12, N=305
Q3a. How much <commodity> does this typically equate to?

Online and In-store Commodity Prices

Asian Vegetables (Pak Choy)

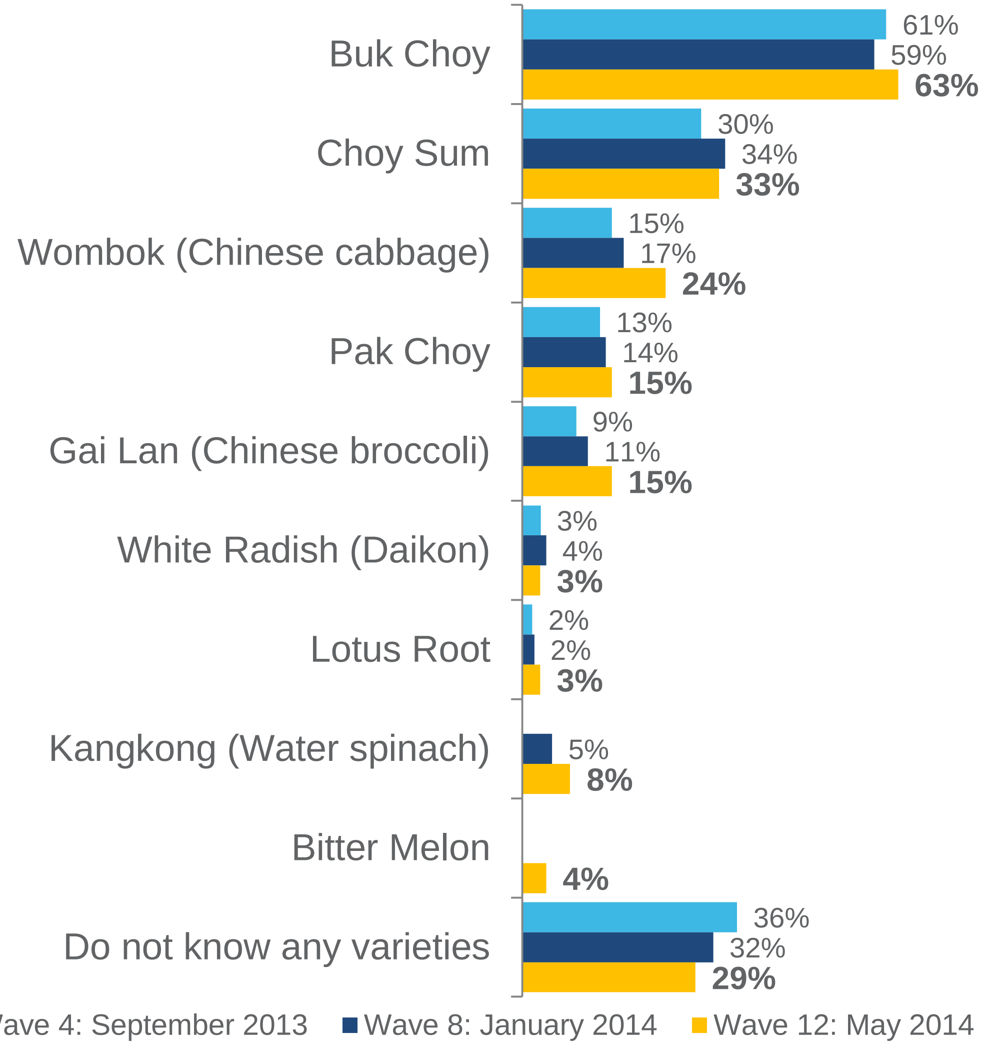


- The average price for Pak Choy was consistent across the three months of price analysis. May 2014 was only marginally higher at 2.17 per bunch.
- There was little price fluctuation across state and retailer. The highest prices recorded was $2.48 each and the cheapest price was $1.98 each.
- The retail price range was $0.50.

Pricing was carried out on 19th May between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates promotional price.

Spontaneous Awareness

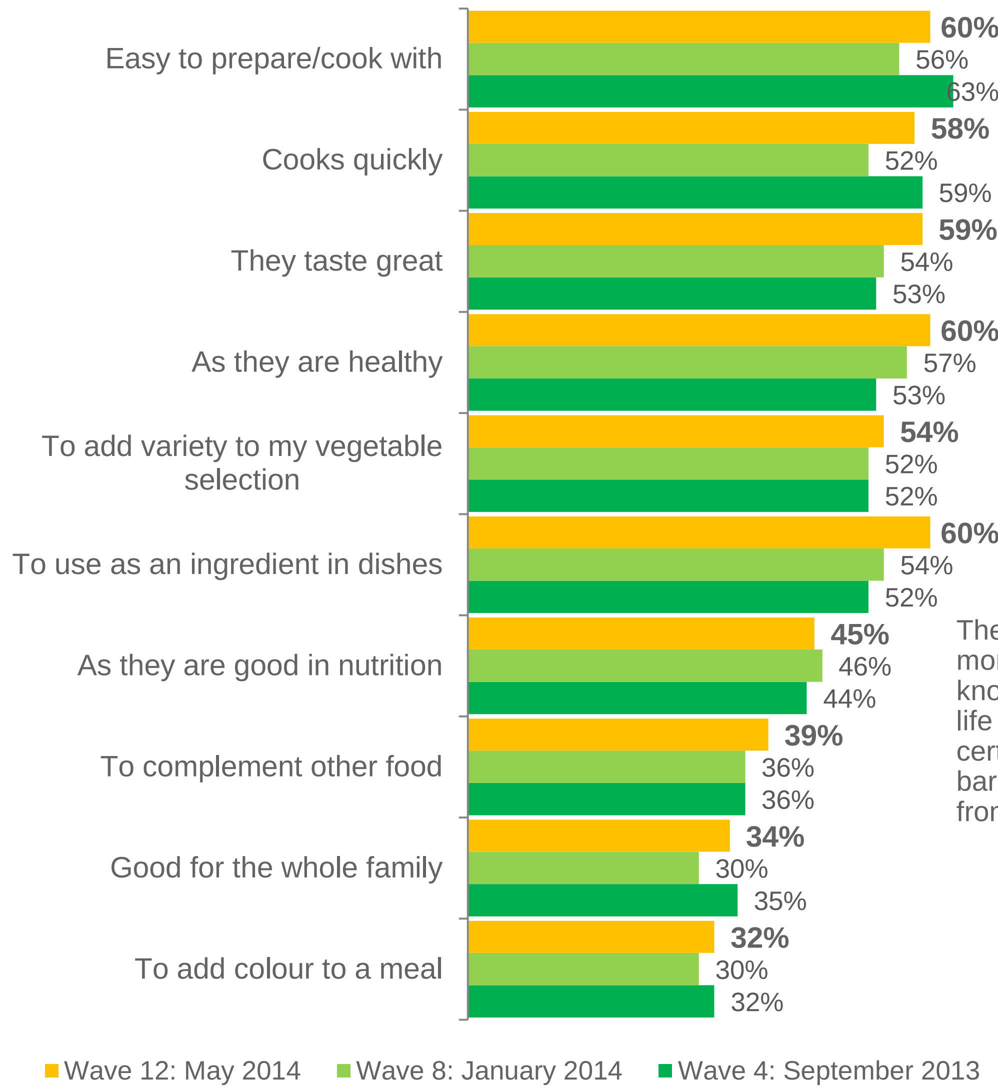
- Across the three waves, spontaneous awareness of Asian vegetables had increased.
- There was consistent increased in recall of wombok, pak choy and gai lan across the waves.
- Buk choy had the greatest awareness of all Asian Vegetables. Opportunity exists to educate consumers about other Asian Vegetables.



Sample Wave 4, N=421, Wave 8, N=313 & Wave 12, N=305
Q6a. What varieties/types of <commodity> are you aware of? (unprompted)

Triggers and Barriers to Purchase

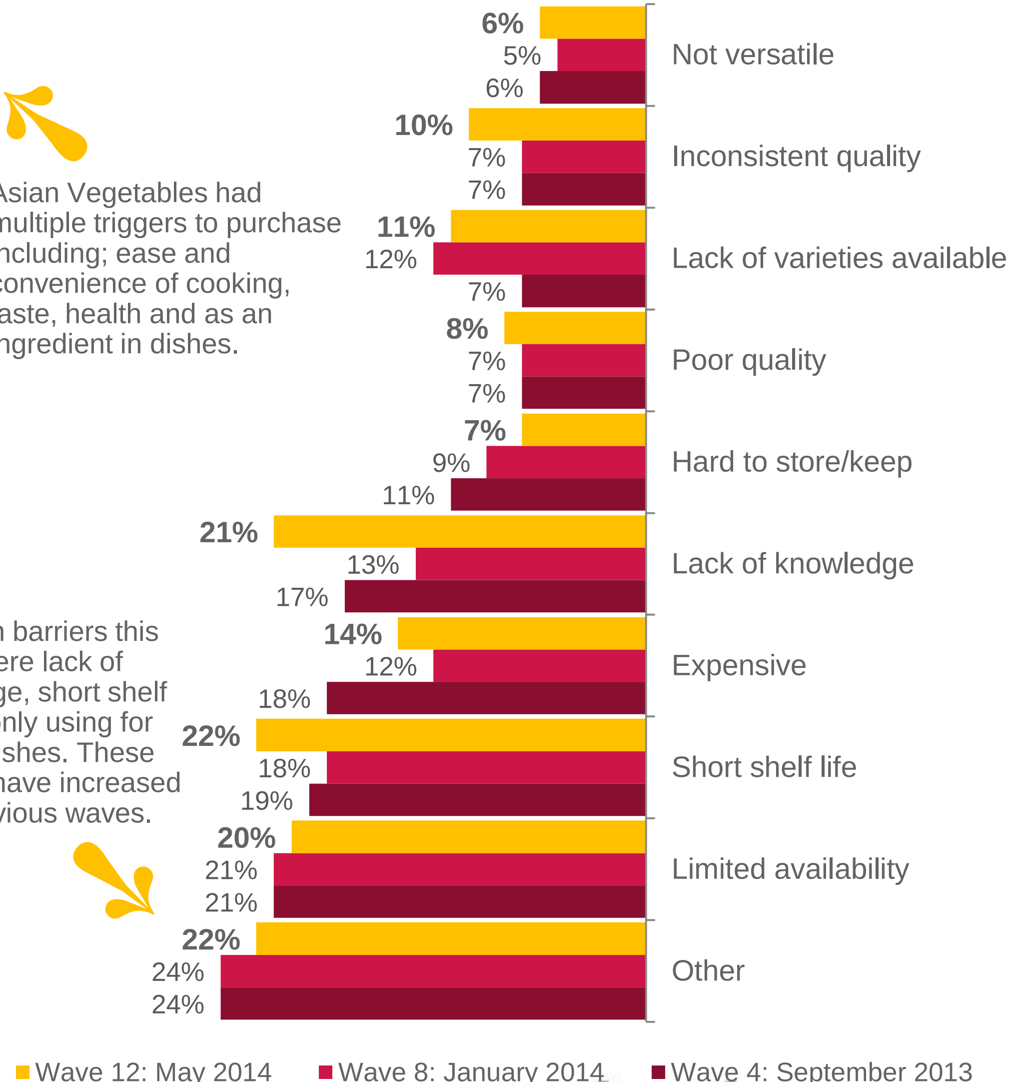
Triggers



Asian Vegetables had multiple triggers to purchase including; ease and convenience of cooking, taste, health and as an ingredient in dishes.

The main barriers this month were lack of knowledge, short shelf life and only using for certain dishes. These barriers have increased from previous waves.

Barriers



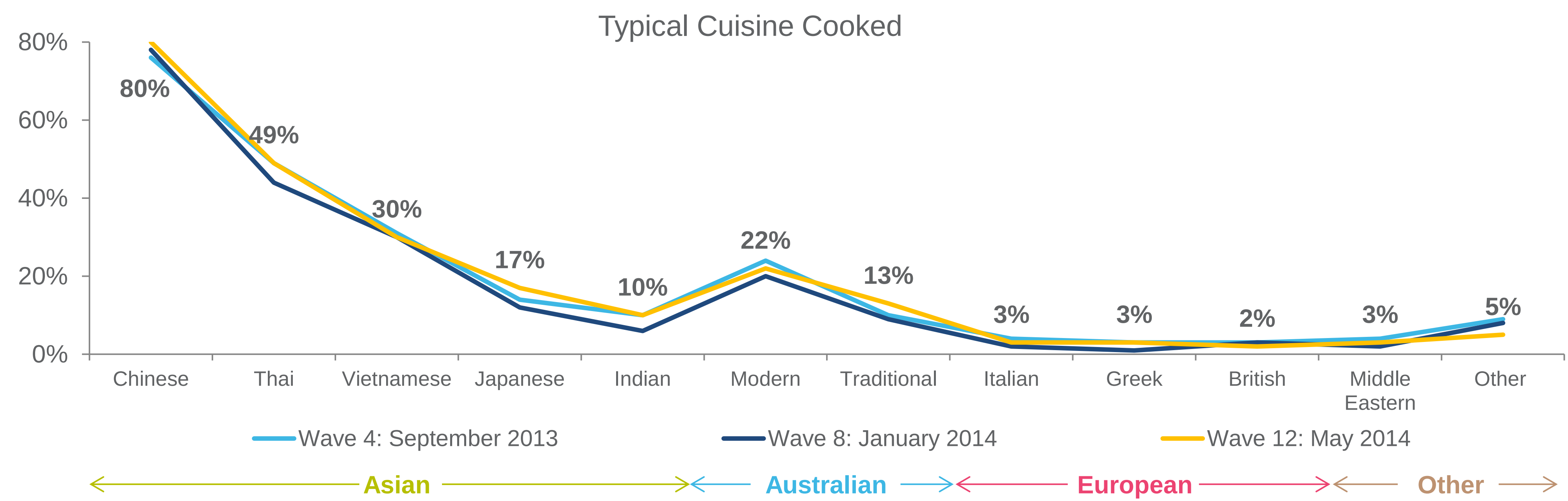
Sample Wave 4, N=421, Wave 8, N=313 & Wave 12, N=305
Q7. Which of the following reasons best describes why you purchase <commodity>?
Q8. Which reason best describes why you don't buy <commodity> more often?

Cooking Cuisine & Occasions

- Cuisine remained relatively constant across the three waves of tracking. Chinese cuisine was the typical choice.
- Nearly half of consumers opted Asian Vegetables for quick meals, highlighting its convenience and easy preparation.

Wave 12 Top 5 Consumption Occasions

	Wave 12	Wave 8	Wave 4
Weekday dinner	**61%**	▼	▼
Quick meals	**45%**	▼	▼
Weekend dinner	**39%**	–	▼
Family meals	**37%**	▼	▼
Everyday	**29%**	▲	▲



Sample Wave 4, N=421, Wave 8, N=313 & Wave 12, N=305
Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?

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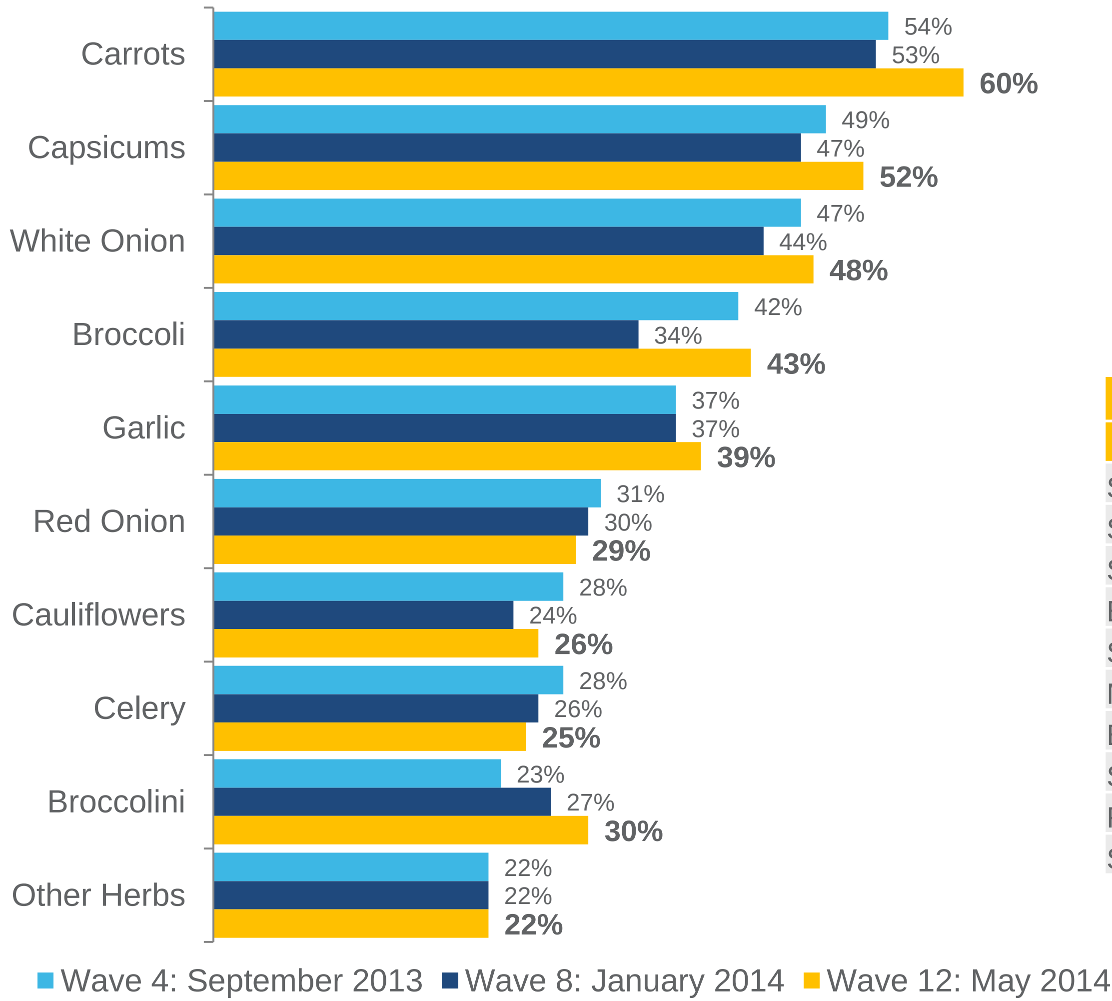
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Cooking Preferences

Top 10 Accompanying Vegetables



- Consistent with Asian cuisine, stir-frying and streaming were the main cooking techniques used for Asian Vegetables.
- Asian Vegetables were generally served with carrots, capsicums, onion, broccoli. This serving combination has strengthened over the past three waves.

Top 10 Cooking Styles			
	Wave 4	Wave 8	Wave 12
Stir frying	77%	83%	84%
Steaming	44%	42%	47%
Soup	22%	20%	20%
Boiling	19%	12%	15%
Sautéing	19%	17%	20%
Microwave	11%	8%	12%
Blanche	11%	10%	16%
Shallow Frying	11%	12%	12%
Raw	11%	10%	10%
Stewing	7%	7%	8%

Sample Wave 4, N=421, Wave 8, N=313 & Wave 12, N=305
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?

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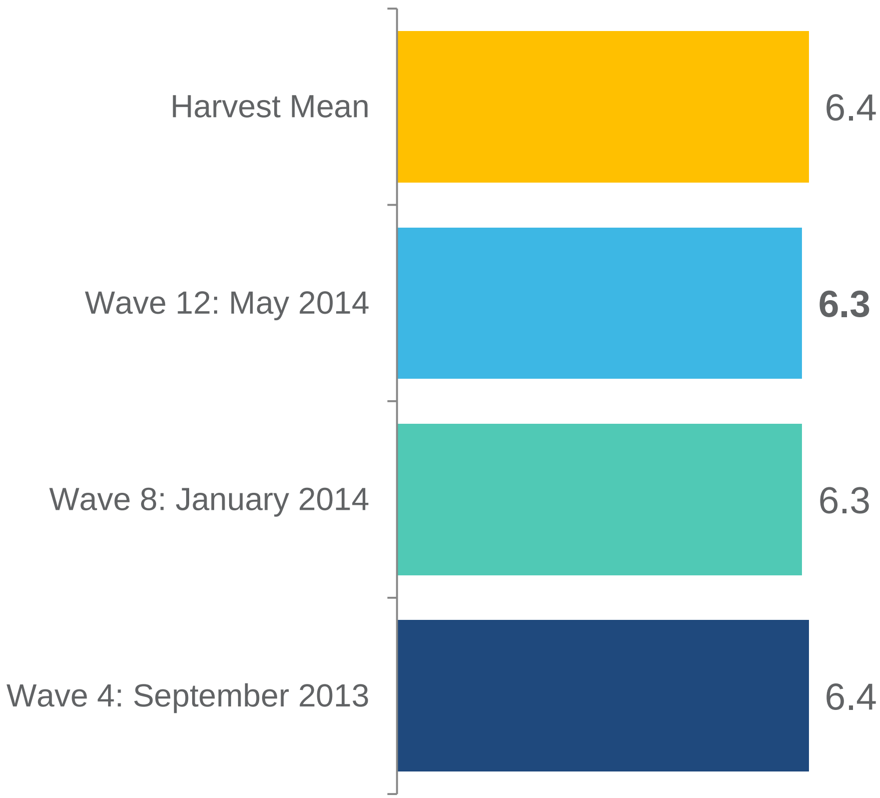
Importance of Provenance

- The provenance of Asian Vegetables is relatively important consumers – consistent with that measured in previous waves and the Harvest mean for all vegetables evaluated.



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

Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 4, N=421, Wave 8, N=313 & Wave 12, N=305

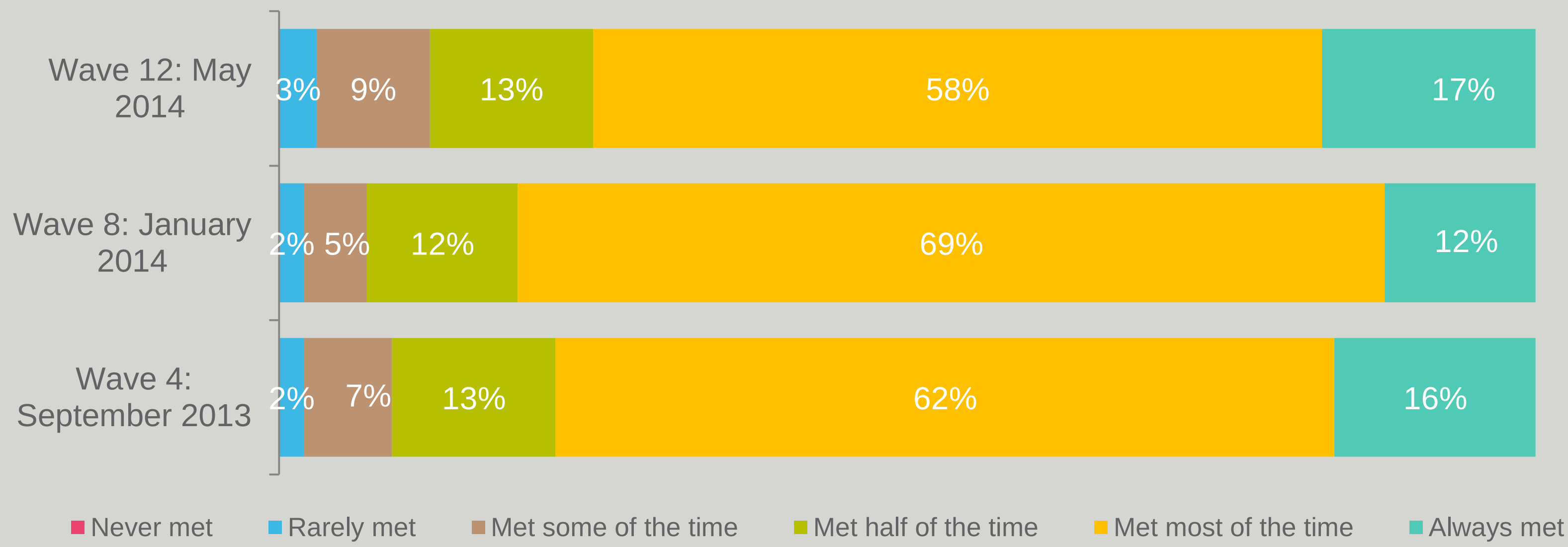
Freshness and Longevity

Expected to stay fresh for **5.9** days

5.9 days, Wave 4
5.5 days, Wave 8

- Asian Vegetables were expected to remain fresh for 6 days once purchased. This was consistent over the three waves.
- Longevity of freshness was generally met.
- Comparatively Wave 8 (January) saw a decline in freshness and longevity. To avoid alienation of consumers, investigate supply chain, storage, or display that could increase freshness in the warmer months.

Expectations Met



Sample Wave 4, N=421, Wave 8, N=313 & Wave 12, N=305
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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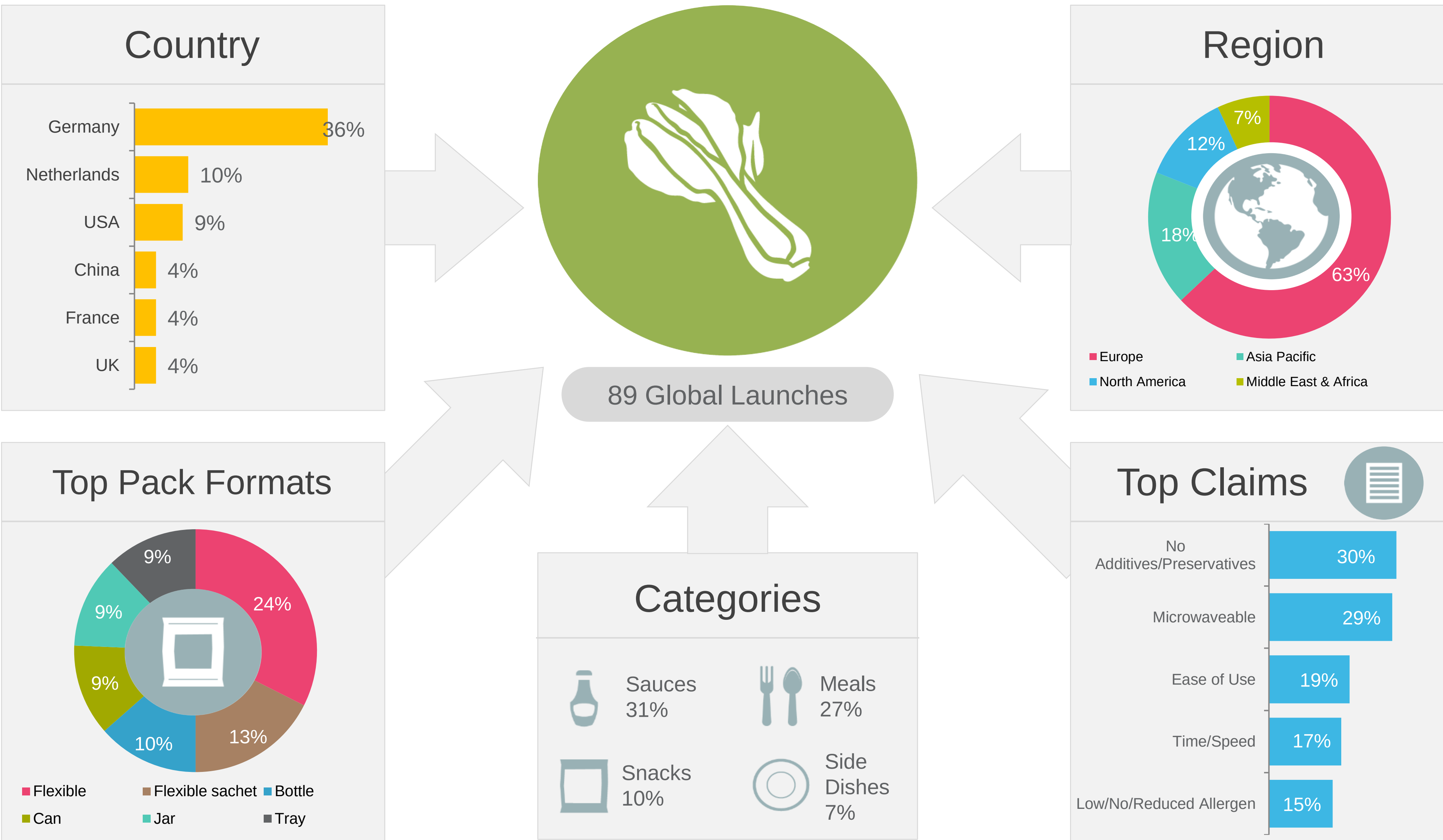
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Trends: Asian Vegetables

Asian Vegetables Global NPDs
March 2014 – May 2014

There were 89 products launched globally within the last three months that contained Asian vegetables. The majority launched were in Europe, particularly Germany. Popular categories for launch were sauces and meals.



Asian Vegetables Product Launches:
Last 3 Months (March 2014 - May 2014)
Summary

- There were 89 products launched globally that contained Asian vegetables over the last three months. The number of launches had increased since January 2014.
- In Australia there were three products launched, which can be found in the following pages.
- Europe (63%) was the primary region for products launched over the last three months. Germany was the key country for launches (36%).
- Consistent with previous trends flexible formats including sachets were the most used packaging for launches.
- The top category launches remained sauces and seasoning (31%), and meals and meal centres (27%).
- Popular claims used were around health (no additives/preservatives) and convenience, including ease of use, microwaveable and time/speed.
- The most innovative Asian Vegetable product was the Dukan Lemon Flavoured Konjac Sticks launched in France (example can be found in the following pages).

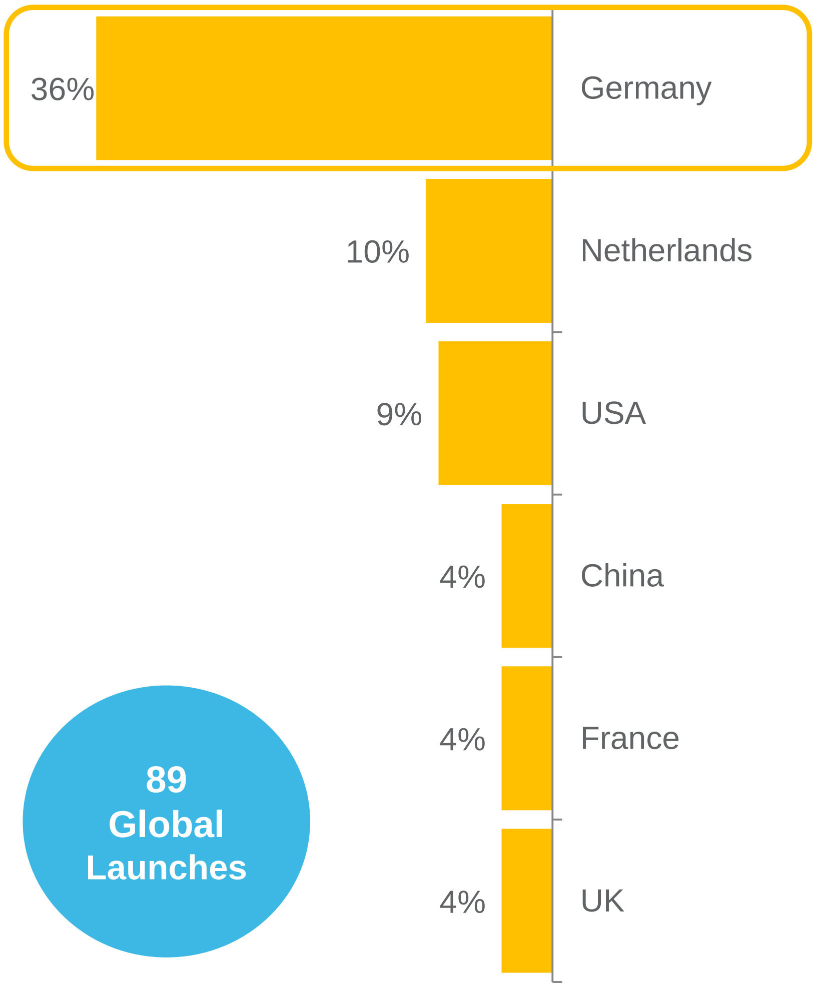
Source: Mintel (2014)

Asian Vegetables Launches
Country & Categories

⇛ A third of products launched in the last three months were from Germany, which was consistent with previous trends.

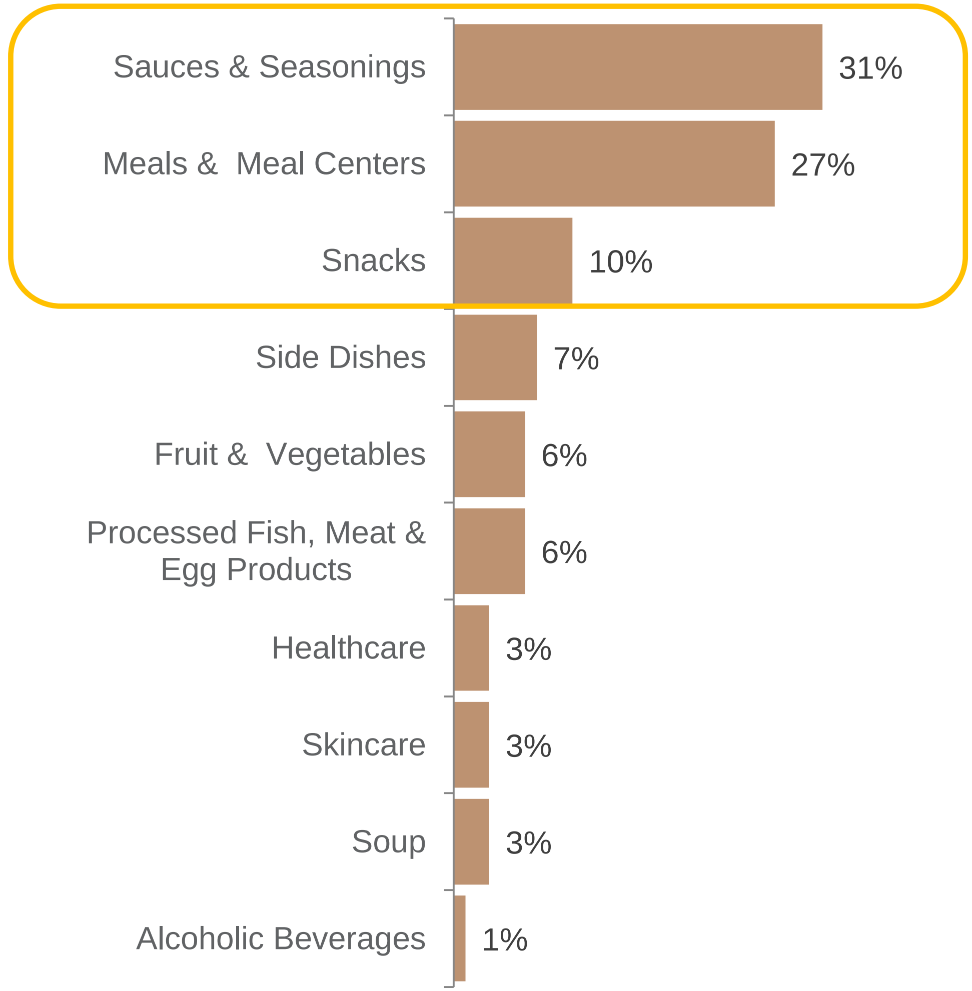
⇛ Asian vegetable products were launched in a variety of categories. Sauces, seasonings and meals were the most common categories for products.

Top Launch Countries



89 Global Launches

Top Launch Categories



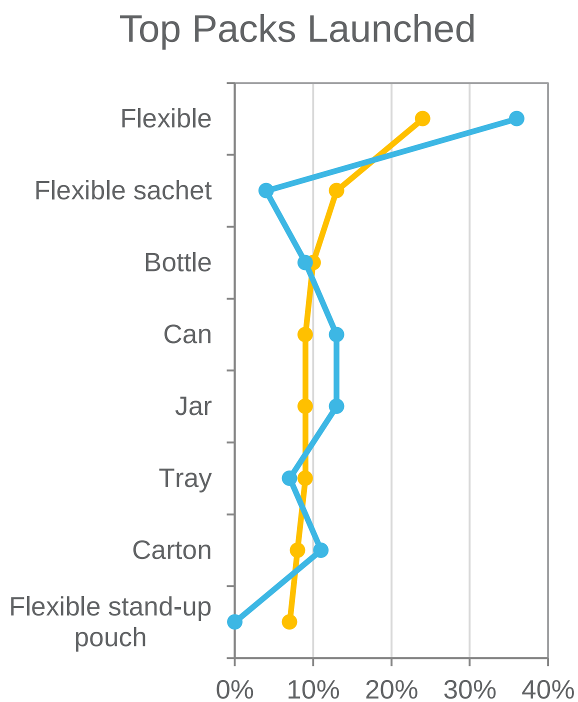
Number of Global Asian Vegetable NPD for the L3M N=89

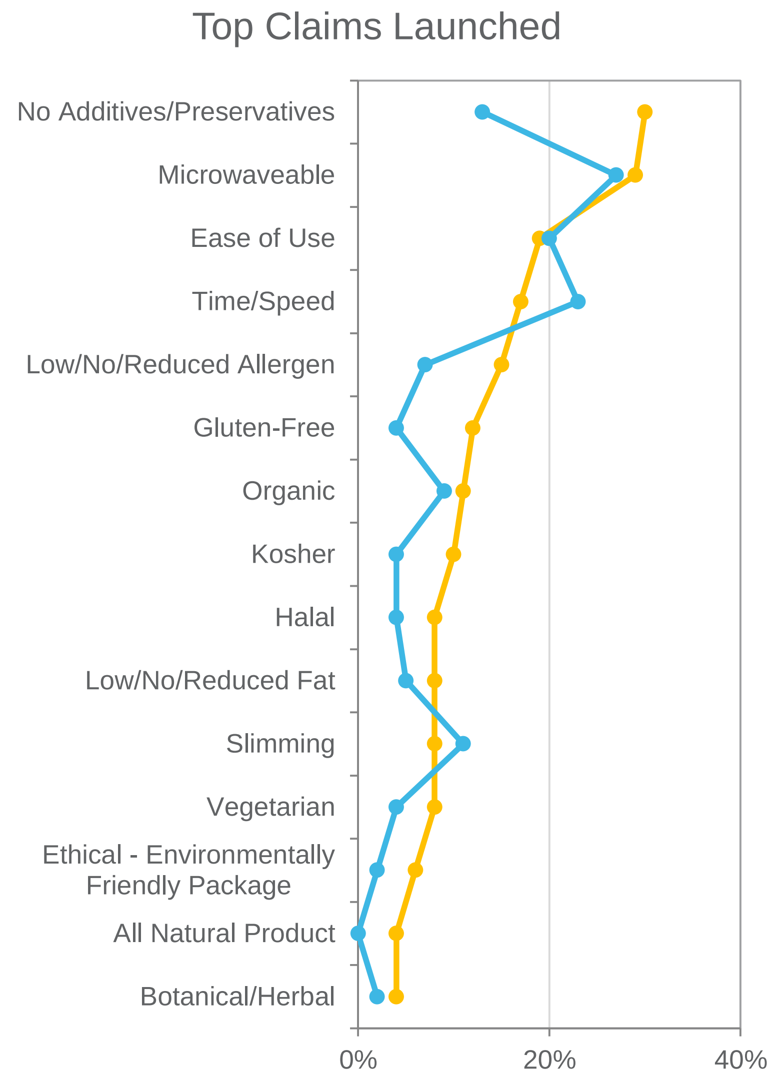
colmar brunton.

Asian Vegetables Launches

Top Claims & Pack Formats Used

- Across the three waves flexible packaging was the most common format used for products containing Asian vegetables.
- Health (no additives and preservatives) and convenience claims were most commonly used on products over the last three months.





Global (N=89) Europe (N=56)

Number of Global Asian Vegetable NPD for the L3M N=89
Only regions with n >30 are displayed

Innovative Asian Vegetables Launches:
L3M (March – May 2014)

Explore Asian Vegetarian Beef Flavor Gluten Free Soybean Noodle Soup (Israel)

Explore Asian Vegetarian Beef Flavor Gluten Free Soybean Noodle Soup is made with organic soybean and is free from MSG. This all natural product contains 82% organic ingredients, is low in fat, rich in iron and high in protein and fiber. The kosher certified product is microwaveable, and retails in a 62g pack.

Claims:
No Additives/Preservatives, All Natural Product, Low/No/Reduced Allergen, Gluten-Free, High/Added Fiber, Kosher, Low/No/Reduced Fat, Microwaveable, Organic, Vegetarian, High Protein

Safeway Kitchens Asian Style Blend Gourmet Salad Topper (Canada)

Safeway Kitchens Asian Style Blend Gourmet Salad Topper comprises sesame teriyaki cashews, honey glazed almonds and rice noodles. The product retails in a 113g pack.

Claims:
N/A

Sywan Kulinaria Asian Style Tuna Salad (Hungary)

Sywan Kulinaria Tonhalsaláta Zöldségekkel (Asian Style Tuna Salad) is now available. The product retails in a 200g pack.

Claims:
N/A

Kroger Skillet Meals Shrimp Lo Mein (USA)

Kroger Skillet Meals Shrimp Lo Mein comprises Asian style sauce, shrimp, broccoli, snow peas, shiitake mushrooms, red bell peppers and onions. It can prepare a complete meal in 10 minutes and is microwaveable. This product retails in a 20-oz. pack providing three servings.

Claims:
Time/Speed, Microwaveable

Source: Mintel (2014)

Innovative Asian Vegetables Launches:
L3M (March – May 2014)

Vitasia Crispy Duck on a Bed of Oriental Vegetables (Spain)

Vitasia Pato Crujiente con Verduras Especiadas (Crispy Duck on a Bed of Oriental Vegetables) is new to the range. This product consists of boneless, seasoned, and spiced duck strips with spiced Asian vegetables, can be oven-baked without the need for defrosting, and retails in a 550g pack.

Claims:
Ease of Use

Dukan Lemon Flavoured Konjac Sticks (France)

Dukan Konjac Saveur Citron (Lemon Flavoured Konjac Sticks) are sweetened food supplements based on vegetable fibres from konjac tuber. This product helps lose weight, when taken as part of a calorie-controlled diet. According to the manufacturer, the konjac root, which is traditionally used in Asian food, is one's new slimming ally.

Claims:
Slimming

Jumbo Asian Chicken Satay Bapao (Netherlands)

Jumbo Aziatisch Kipsaté Bapao (Asian Chicken Satay Bapao) is now available. The product comprises steamed bread with a chicken and satay sauce filling. The microwaveable product can be taken on the go and is quickly prepared. The bapao retails in a 115g pack, bearing the Gezondere Keuze Healthy Choice logo.

Claims:
Vegetarian, On-the-Go, Time/Speed, Microwaveable

Vici Asian Style Dumplings with Vegetables (Poland)

Vici Pierogi z Warzywami (Asian Style Dumplings with Vegetables) feature 60% of fresh vegetables in the filling and a 0.8mm thin dough. The microwaveable product retails in a 400g pack.

Claims:
Time/Speed, Microwaveable

Source: Mintel (2014)

Innovative Asian Vegetables Launches:
L3M (March – May 2014)

Kabuto Chilli Chicken Ramen Noodles (UK)

Kabuto Chilli Chicken Ramen Noodles are described as a fresh tasting spice noodle dish with chicken, extra chilli, peppers, coriander and lime. This product is a delicious combination of authentic Asian flavours and quality ingredients, retailing in a 85g pack.

Claims:
N/A

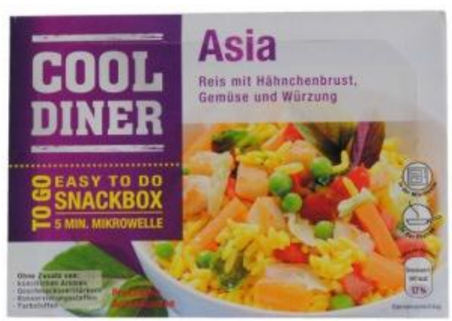
Asian Home Gourmet Mild Spice Paste for Singapore Laksa Coconut Curry Noodles (Philippines)

Asian Home Gourmet Mild Spice Paste for Singapore Laksa Coconut Curry Noodles is a paste for making a rich full-bodied coconut curry, which is said to be one of Singapore's most favourite dishes.

Claims:
Halal, No Additives/Preservatives, Low/No/Reduced Allergen, Vegetarian, Gluten-Free

Cool Diner To Go Easy To Do Snackbox Asian Rice Dish with Chicken Breast, Vegetables and Seasoning (Germany)

Cool Diner To Go Easy To Do Snackbox Asia Reis mit Hähnchenbrust, Gemüse und Würzung (Asian Rice Dish with Chicken Breast, Vegetables and Seasoning) has been relaunched. Previously marketed under the brand name Cool Diner, this dish is free from artificial flavours, flavour enhancers, preservatives and colourants.



Claims:
No Additives/Preservatives, On-the-Go, Time/Speed, Microwaveable, Ease of Use, Convenient Packaging

Real,- Quality Bami Goreng Meal (Germany)

Real,- Quality Bami Goreng Pfannengericht (Bami Goreng Meal) comprises noodles with chicken breast fillet and various vegetables and mushrooms. The Asian style product retails in 500g pack.

.

Claims:
N/A

Source: Mintel (2014)

Australian Asian Vegetables Launches:
L3M (March – May 2014)

Organic Bubs Super Vegetable Rice Congee

: Organic Bubs Super Vegetable Rice Congee with lumps and bumps is a premium baby meal that is claimed to be crammed with nothing but wholesome organic food to nourish the little ones, keeping their tiny bodies growing.

Claims:
Low/No/Reduced Lactose, No Additives/Preservatives, Hormone Free, Low/No/Reduced Allergen, Convenient Packaging, GMO-Free, Gluten-Free, Other (Functional), Kosher, Ethical - Environmentally Friendly Product, Ethical - Animal, Microwaveable, Halal, Organic, Social Media, Babies & Toddlers (0-4), Premium, On-the-Go, Carbon Neutral

Lee Kum Kee Ready Sauce for Coconut Curry Vegetables

Lee Kum Kee Ready Sauce for Coconut Curry Vegetables provides an authentic Asian meal in minutes. This product just requires the addition of mixed vegetables, and retails in a 110g pack that serves four.

Claims:
Ease of Use, Time/Speed

Kan Tong Inspirations Fragrant Thai Green Curry Asian Meal Base

Kan Tong Inspirations Fragrant Thai Green Curry Asian Meal Base has no added MSG and is said to cook in 10 minutes. This hot heat, easy to prepare product requires just the addition of chicken, green beans and coconut milk, and retails in a 160g pack serving two persons and featuring a recipe suggestion.

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

Source: Mintel (2014)


Baby Spinach.

Purchase and Consumption Behaviour

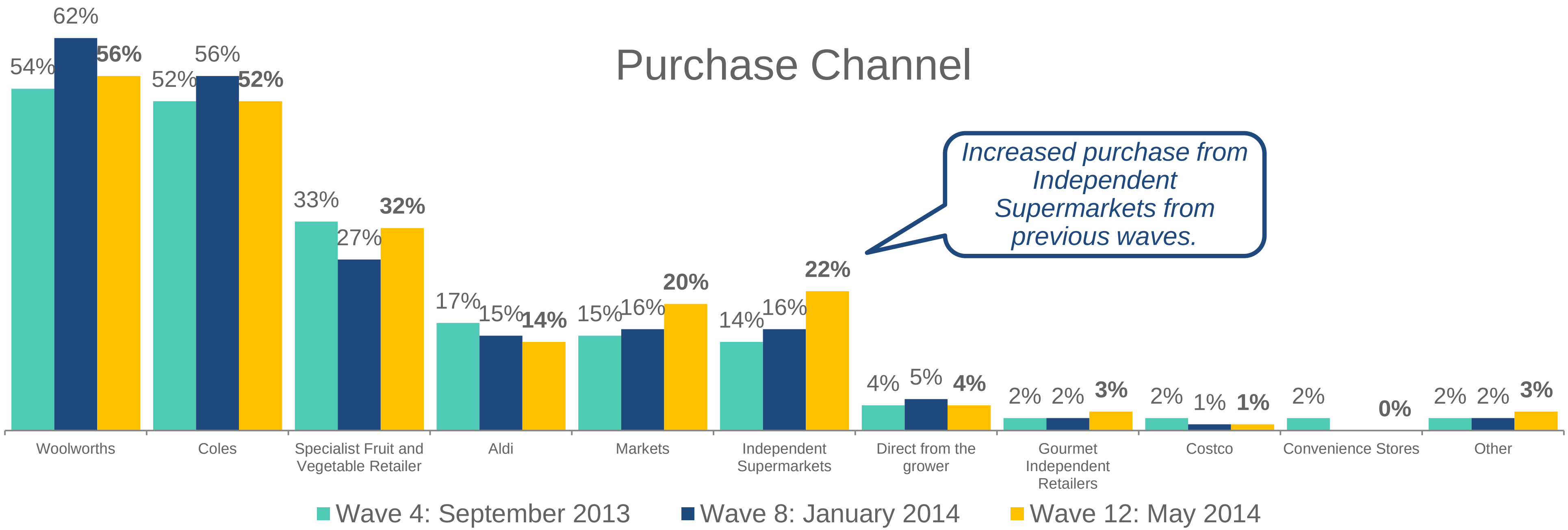
Average Purchase **4.3** times per month

▲ 4.4 times, Wave 4
▲ 4.4 times, Wave 8

Average Consumption **9.8** times per month

▼ 9.3 times, Wave 4
▼ 9.7 times, Wave 8

- Purchase frequency has not varied across waves, however consumption frequency has grown from Wave 4, and has maintained from Wave 8.
- Purchase at most retail outlets has remained steady across waves, however increased within Independent Supermarkets in Wave 12.



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

colmar brunton.

▼: 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 **0.4kg** of Baby Spinach in May 2014. This average remained unchanged across the three waves of tracking.

– 0.4 kg, Wave 4
– 0.4 kg, Wave 8

Recalled last spend

The average recalled last spend was **$3.90** in May, which was slightly higher than previous waves. However, there was minimal fluctuations across the three months.

▼ $3.80, Wave 4
▼ $3.60, Wave 8

Value for money

On average, consumers perceived Baby Spinach to be moderate value for money **(5.9/10),** which was consistent with previous months.

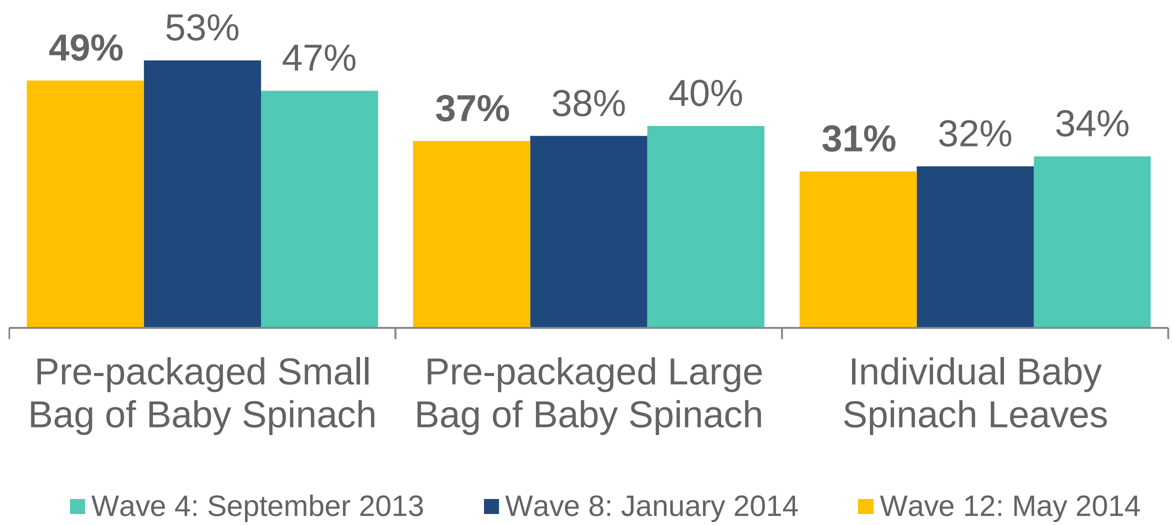
▲ 6.1/10, Wave 4
▲ 6.0/10, Wave 8

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 typical purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 4, N=421, Wave 8, N=313 & Wave 12, N=305

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

Pack Formats Purchased

- Pre-packaged small bags of Baby Spinach remain the most popular package format.
- Despite this, in Wave 12 there was an increase in the number of individual leaves bought per purchase.

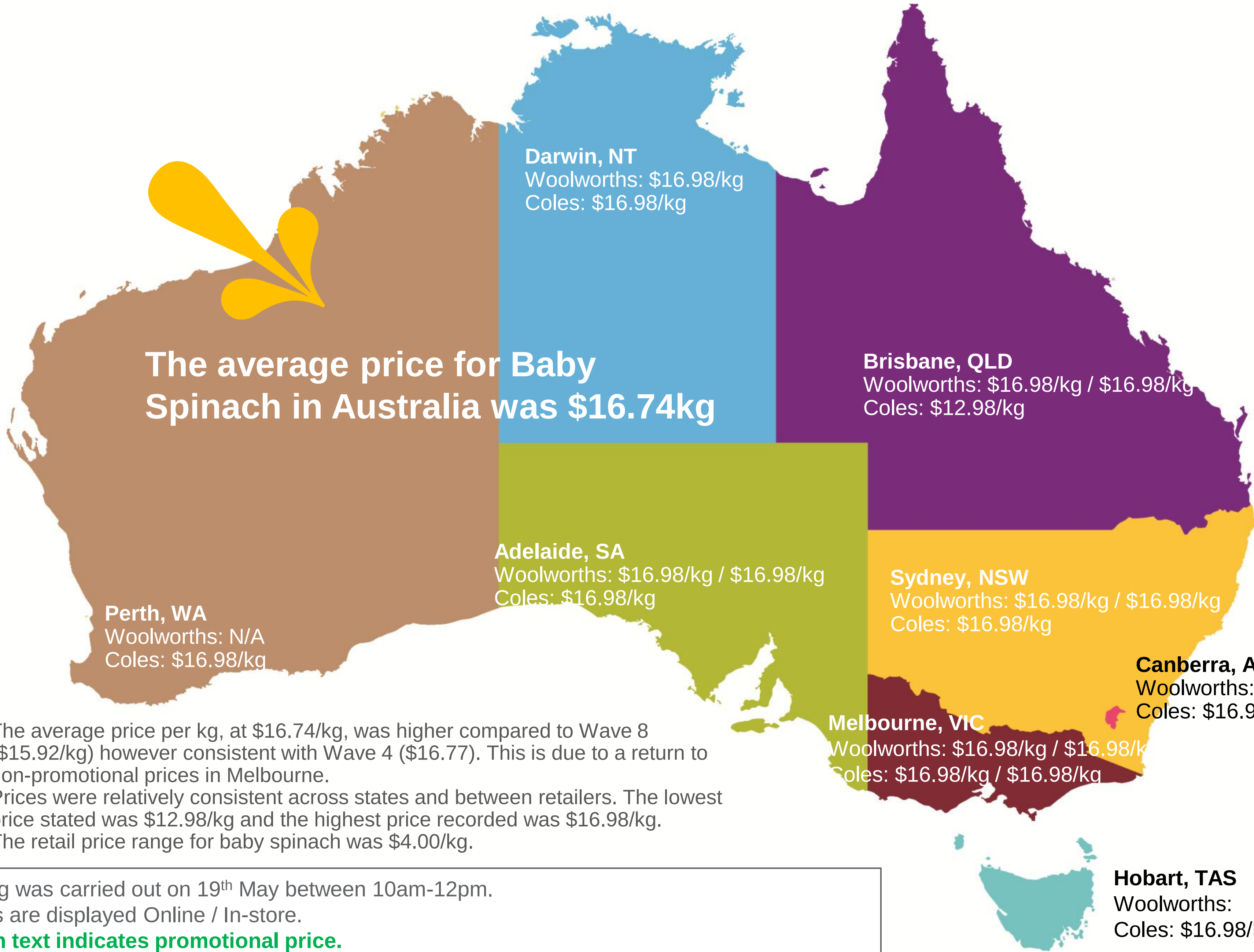


Wave 12 saw an increase in the number of individual leaves purchased.

	Individual Leaves	Pre-packaged Large Bag	Pre-packaged Small Bag
Wave 12	116.2	1.6	1.5
Wave 8	92.7	1.5	1.5
Wave 4	100	1.5	1.5

Sample Wave 4, N=421, Wave 8, N=313 & Wave 12, N=305
Q3a. How much <commodity> does this typically equate to?

Online and In-store Commodity Prices



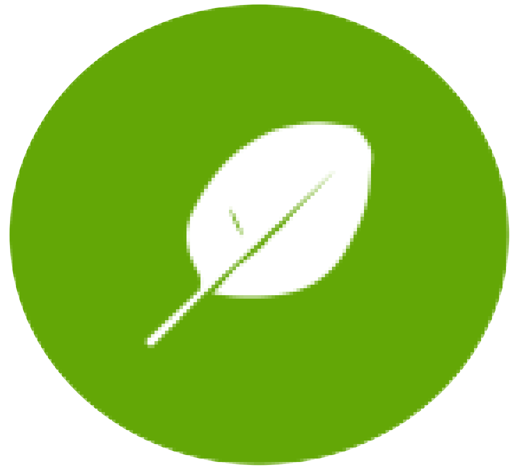
- The average price per kg, at $16.74/kg, was higher compared to Wave 8 ($15.92/kg) however consistent with Wave 4 ($16.77). This is due to a return to non-promotional prices in Melbourne.
- Prices were relatively consistent across states and between retailers. The lowest price stated was $12.98/kg and the highest price recorded was $16.98/kg.
- The retail price range for baby spinach was $4.00/kg.

Pricing was carried out on 19th May between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates promotional price.

Spontaneous Awareness

- Awareness remained very low with over 85% of consumers could not recall a type of baby spinach.
- 5% of respondents named “English” as a type of baby spinach.

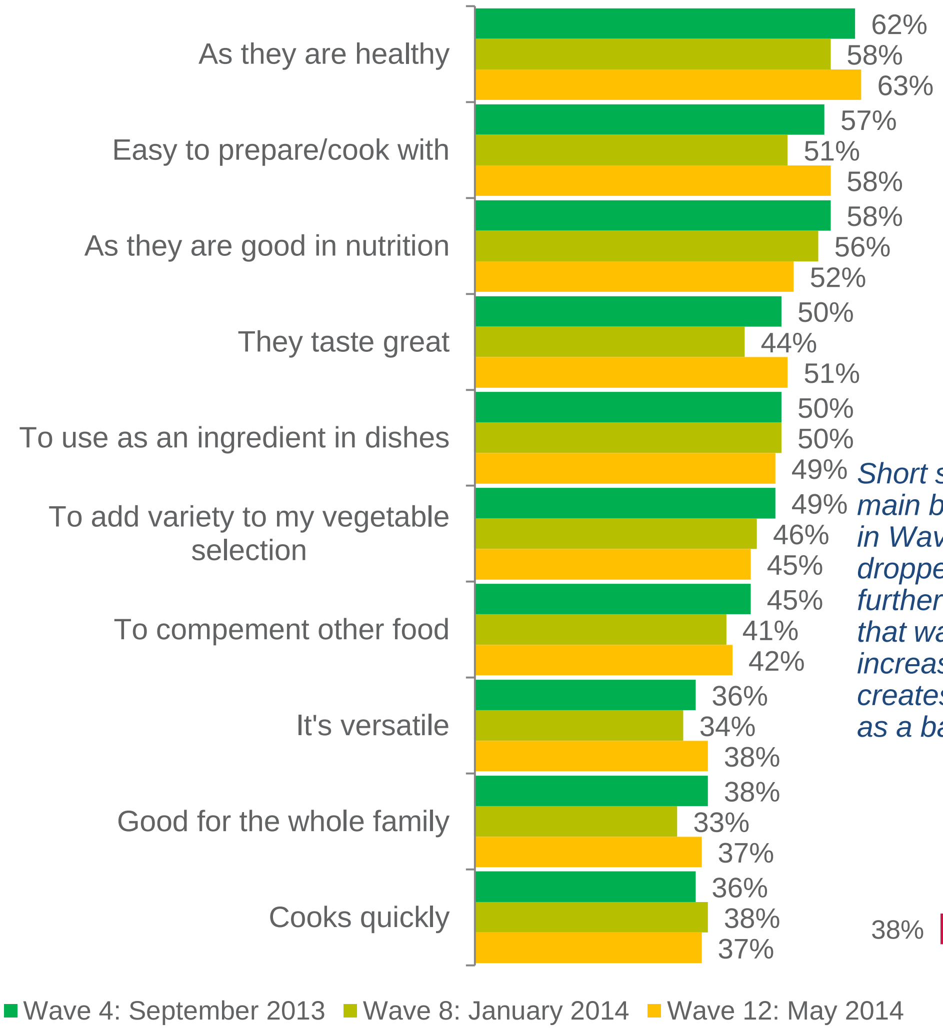
“I don't know. I just buy and eat without considering the weight, or cost. If it looks nice I will buy it.”



Sample Wave 4, N=421, Wave 8, N=313 & Wave 12, N=305
Q6a. What varieties/types of <commodity> are you aware of? (unprompted)

Triggers and Barriers to Purchase

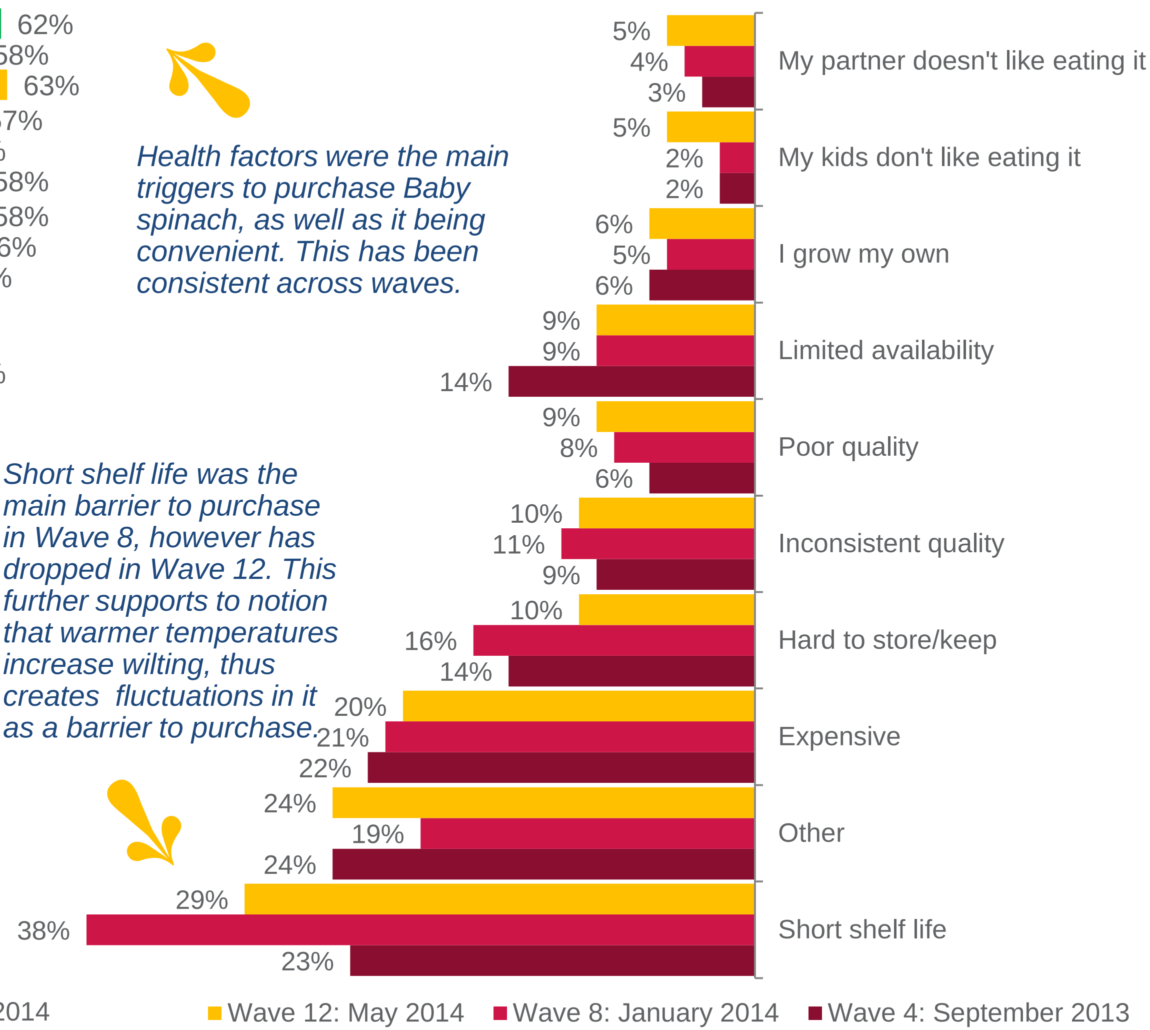
Triggers



Health factors were the main triggers to purchase Baby spinach, as well as it being convenient. This has been consistent across waves.

Short shelf life was the main barrier to purchase in Wave 8, however has dropped in Wave 12. This further supports to notion that warmer temperatures increase wilting, thus creates fluctuations in it as a barrier to purchase.

Barriers



Sample Wave 4, N=421, Wave 8, N=313 & Wave 12, N=305
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?

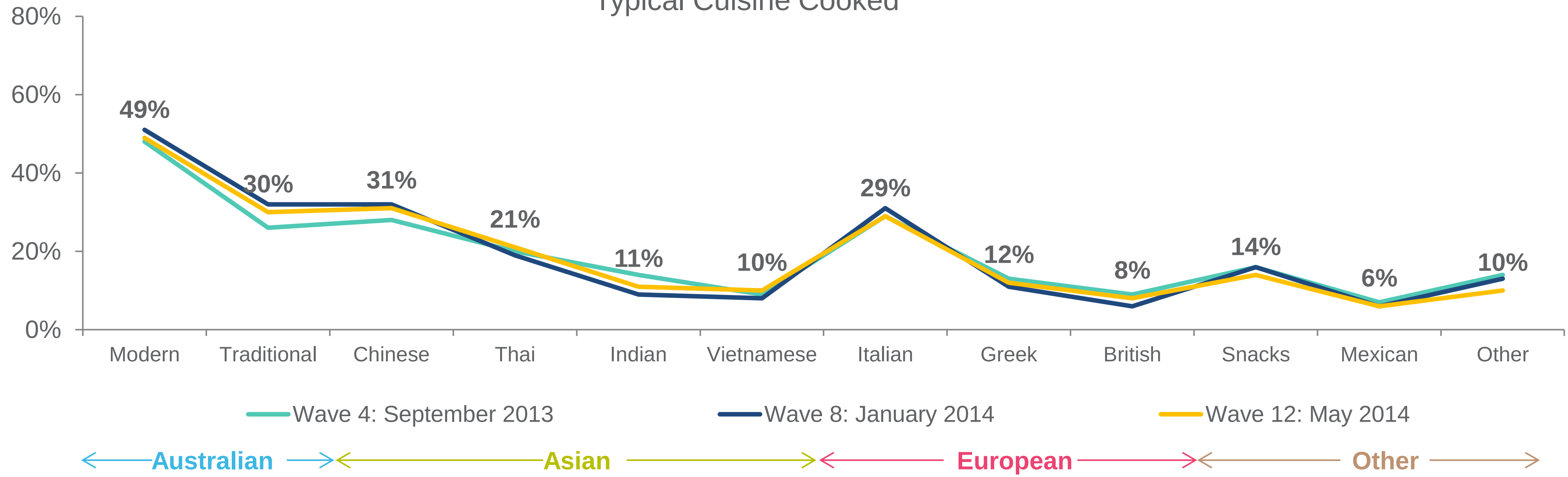
Cooking Cuisine & Occasions

- Cuisine remained relatively constant across the three waves of tracking. Modern, Traditional, Chinese and Italian cuisine were selected most often.
- All consumption occasions dropped for Baby Spinach, excluding Everyday which rose to 36% of consumption occasions.

Wave 12 Top 5 Consumption Occasions

	Wave 12	Wave 8	Wave 4
Weekday dinner	**47%**	▼	▼
Quick meals	**38%**	▼	▼
Everyday	**36%**	▲	▲
Weekend Dinner	**32%**	▼	▼
Family meals	**30%**	▼	▼

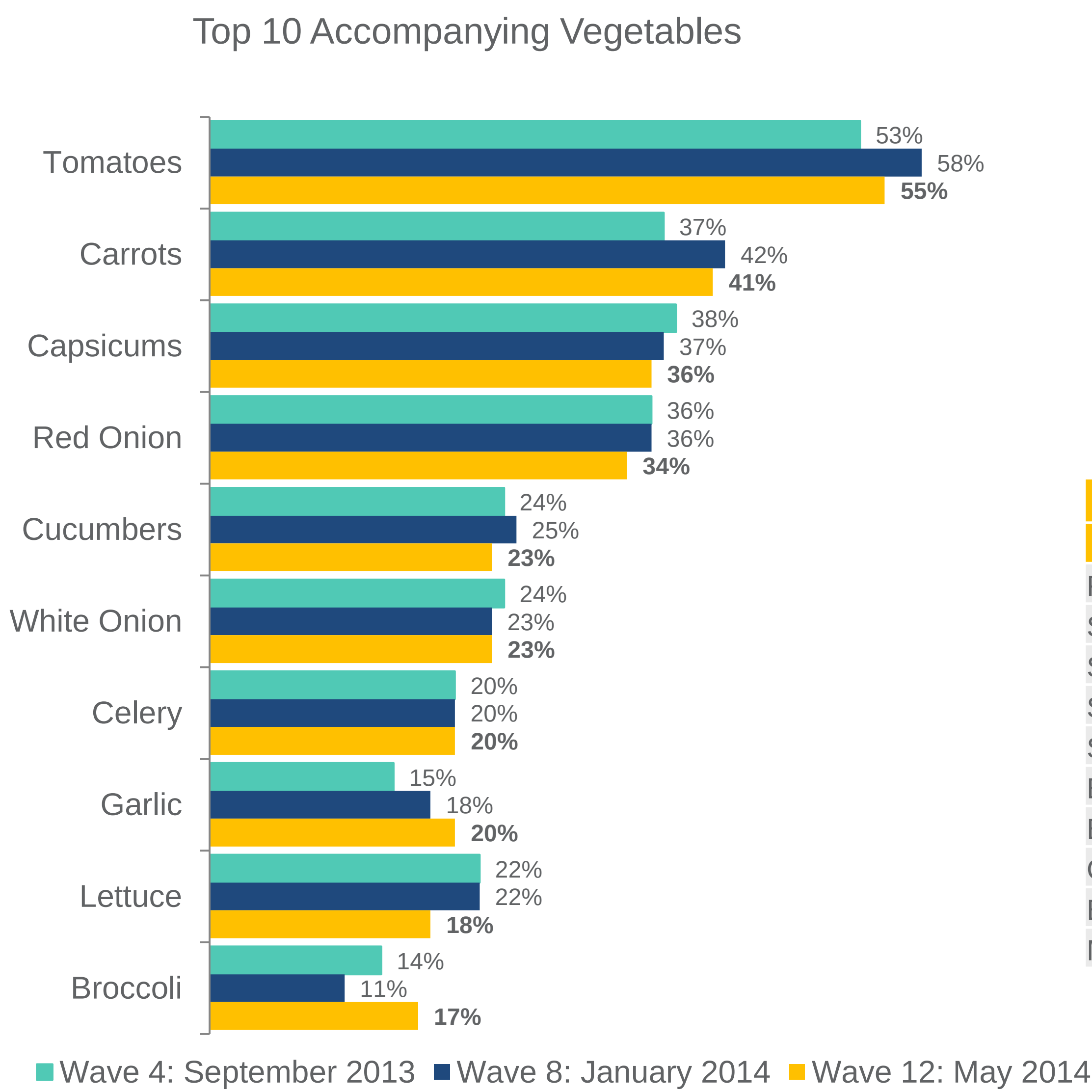
Typical Cuisine Cooked



Sample Wave 4, N=421, Wave 8, N=313 & Wave 12, N=305
Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?

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

Cooking Preferences



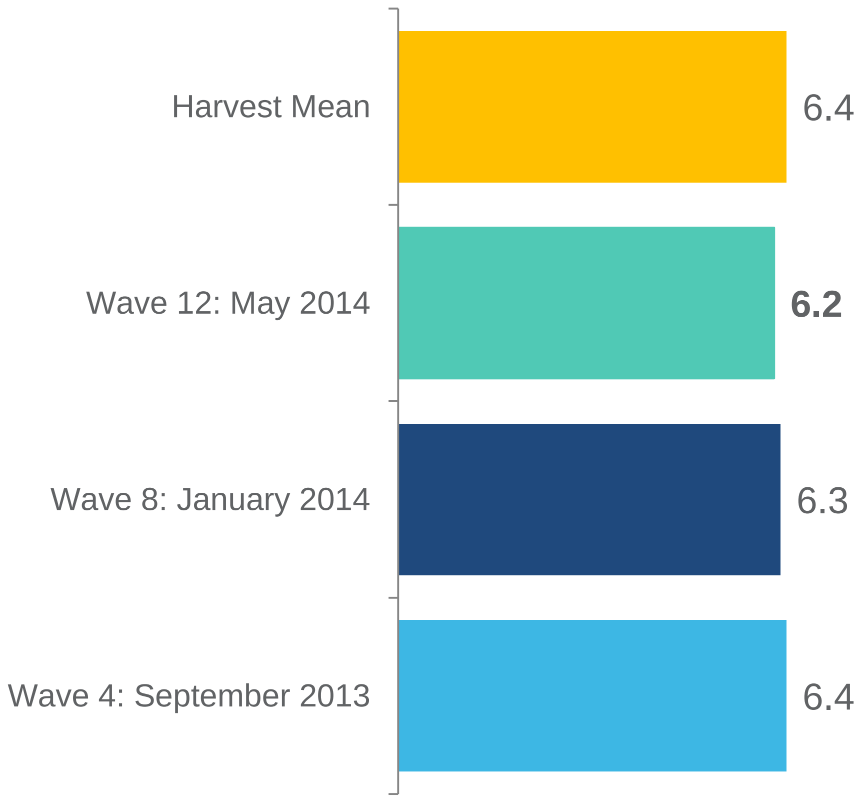
- Consumption with tomatoes, carrots and capsicums remained consistent from previous waves.
- Again, raw was the most consistent method of preparation.

Top 10 Cooking Styles			
	Wave 4	Wave 8	Wave 12
Raw	54%	58%	59%
Stir frying	39%	43%	41%
Steaming	29%	23%	28%
Sautéing	15%	16%	21%
Soup	12%	10%	14%
Blanche	11%	15%	13%
Blend	5%	8%	9%
Other	8%	10%	9%
Boiling	11%	7%	8%
Microwave	8%	6%	6%

Sample Wave 4, N=421, Wave 8, N=313 & Wave 12, N=305
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 past three waves there was a trend towards decreased importance of provenance to consumers. However, provenance maintained parity with the Harvest mean for all commodities.



AUSTRALIAN MADE

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

Q14. When purchasing <commodity>, how important is Provenance to you?
Mean scores out of 10.
Sample Wave 4, N=501, Wave 8, N=300and Wave 12, N=315

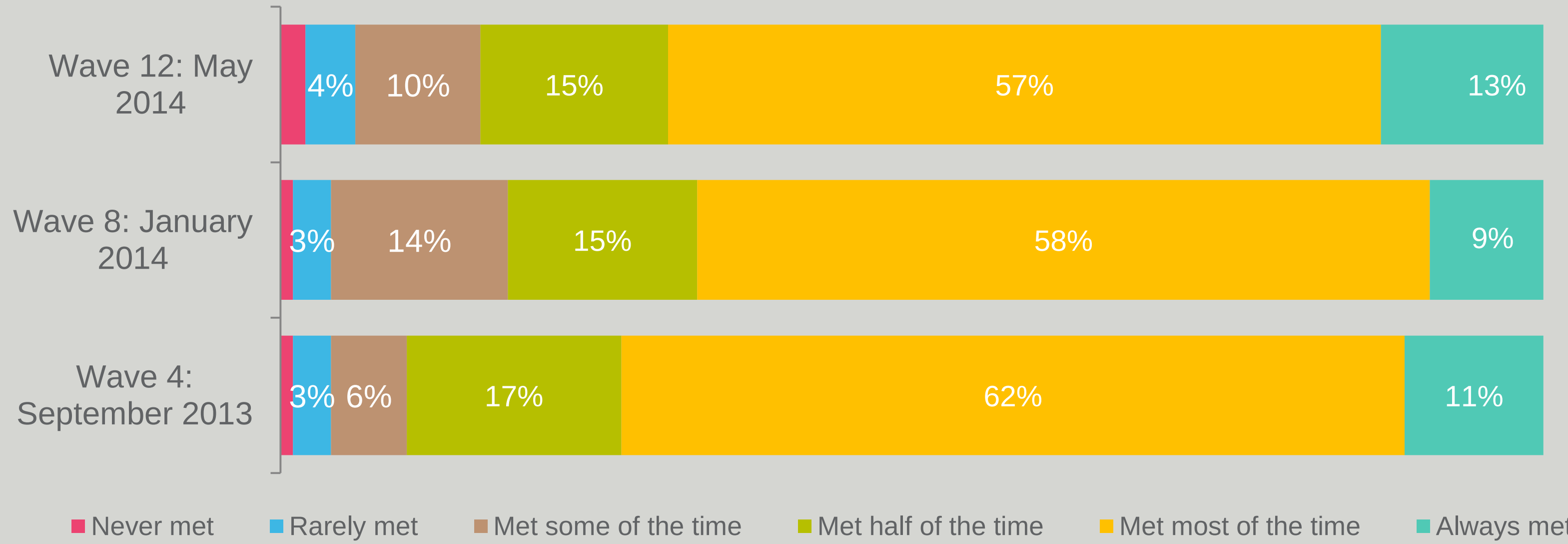
Freshness and Longevity

Expected to stay fresh for **5.6** days

▼ 5.5 days, Wave 4
▲ 5.8 days, Wave 8

- Baby spinach was expected to stay fresh for nearly 6 days, which was in line with freshness from Wave 4.
- Expectations of freshness dipped in January compared to September, and rose again in May, with 13% feeling expectations of freshness of Baby Spinach was always met.

Expectations Met



Sample Wave 4, N=501, Wave 8, N=300, Wave 12, N=315
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.

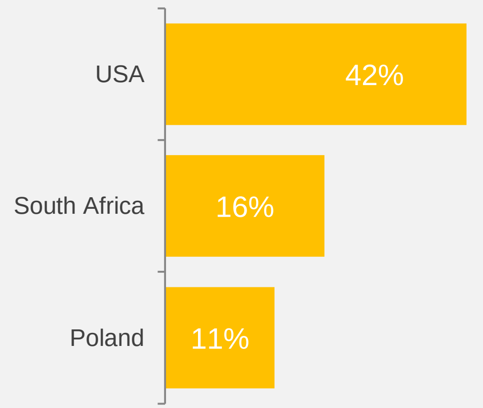
Trends:
Baby Spinach

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

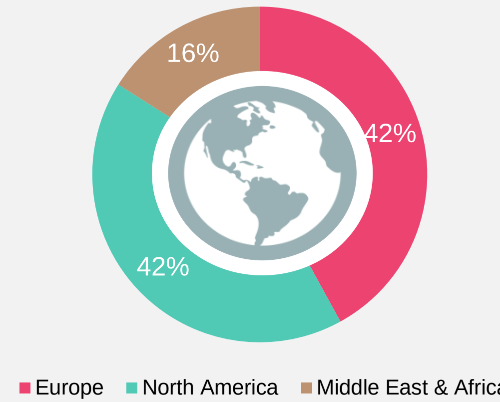
Baby Spinach Global NPDs
March – May 2014

There were 19 products launched globally between March and May 2014 that contained baby spinach. The majority of the launches occurred USA. Flexible packaging was the most common format used. The majority of innovations were around Ease of Use.

Country

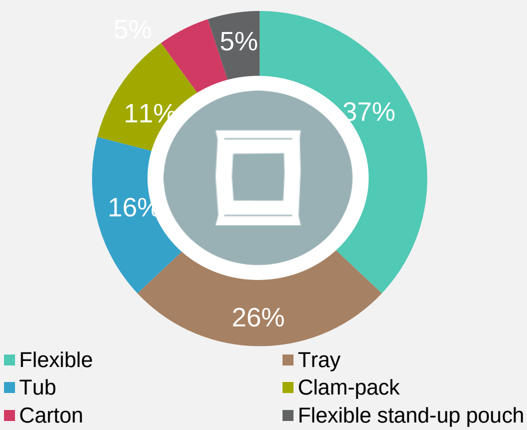


Region



19 Global Launches

Top Pack Formats



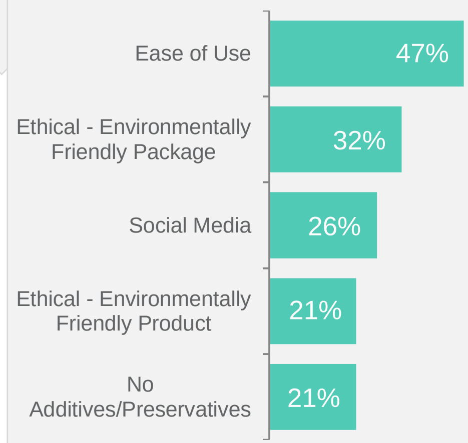
Categories

Fruit & Vegetables 47%

Meals 47%

Processed Products 5%

Top Claims



Baby Spinach Product Launches:
Last 3 Months (March-May 2014)
Summary

- There were 19 global baby spinach products launched over the last 3 months, which was lower than the number of launches between November 2013 and January 2014, and lower still compared to September and November 2013. There were no new launches in Australia.

- The majority of launches occurred in the USA (42%).

- Flexible packaging remained the most common format used (37%), with little change from Wave 8 (35%).

- Top launch categories were fruit & vegetables (47%) and meals (47%). Innovation in the meals category has increased from the previous 3 months, up from 16%.

- The majority of products launched used the claim “Ease of Use” (47%).

- The most innovative baby spinach product launched was Earthbound Farm Organic Power Deep Green Blends. An organic certified blend that of does not require washing (examples of these can be found in the following pages).

Source: Mintel (2014)

Innovative Baby Spinach Launches:
L3M (March – May 2014)

Ready Pac Bistro Salads Baby Kale Apple Walnut Salad (USA)

Ready Pac Bistro Salads Baby Kale Apple Walnut Salad includes a lettuce blend with the following toppings; apples, white cheddar cheese, candied walnuts, golden raisins and an apple vinaigrette dressing. The product contains 280 calories per bowl and is an excellent source of vitamin A and vitamin C.

Claims:
N/A

Five Star Gourmet Foods Tuscan Artichoke Salad (USA)

Five Star Gourmet Foods Tuscan Artichoke Salad is said to feature the savory tastes found in the Italian region of Tuscany. This premium product comprises baby lettuces topped with artichoke hearts, parmesan cheese, tomatoes, roasted red pepper and olive oil balsamic vinaigrette dressing, and provides 180 calories per salad.

Claims:
Ease of Use, Ethical - Environmentally Friendly Package, Premium

Iglo Erntefrisch Gemüse à la Crème Spring Vegetables with Wild Garlic (Austria)

Iglo Erntefrisch Gemüse à la Crème Frühlingsauslese mit Bärlauch (Spring Vegetables with Wild Garlic) from the Marchfeld region have been frozen within hours of being picked to preserve the vitamins.

Claims:
No Additives/Preservatives, Ethical - Environmentally Friendly Package, Seasonal, Ethical - Environmentally Friendly Product, Microwaveable

Marks & Spencer Icelandic Cod Fillets (UK)

Marks & Spencer Icelandic Cod Fillets feature baby spinach, mozzarella and basil topping, finished with crème fraîche and semi-dried tomatoes. This product retails in a 260g partly recyclable, FSC-certified pack featuring the Forever Fish logo.

Claims:
Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product

Source: Mintel (2014)

Innovative Baby Spinach Launches:
L3M (March – May 2014)

Trader Joe's Vietnamese Brand Chicken Wrap with Ginger Lime Dipping Sauce (USA)

Trader Joe's Vietnamese Brand Chicken Wrap with Ginger Lime Dipping Sauce is USDA inspected. The product retails in a 10-oz. pack.

Claims:
N/A

Trader Joe's Baby Spinach & Greens Salad (USA)

Trader Joe's Baby Spinach & Greens Salad comes with blue cheese, candied pecans and cranberries with raspberry vinaigrette. This product is suitable for vegetarians and retails in an 8.5-oz. pack..

Claims:
Vegetarian

7-Eleven Fresh To Go Mandarin Pineapple Salad with Chicken (USA)

7-Eleven Fresh To Go Mandarin Pineapple Salad with Chicken comprises white meat chicken, spring mix, Mandarin oranges, pineapple, red bell peppers and carrots with a tangy citrus dressing. The product contains 160 calories and retails in a 6-oz. pack.

Claims:
On-the-Go

City Farming Smoked Salmon Farm Wrap (Germany)

City Farming Farm Wrap Räucherlachs (Smoked Salmon Farm Wrap) is freshly made with plain tortillas, smoked salmon, baby spinach leaves and a honey mustard sauce. It retails in a 200g pack containing two wraps and features the Facebook logo.

Claims:
No Additives/Preservatives, Time/Speed, Ease of Use, Social Media, Vegetarian, Wholegrain

Source: Mintel (2014)

Innovative Baby Spinach Launches:
L3M (March – May 2014)

Woolworths Food Beef & Mustard Sandwich (South Africa)

Woolworths Food Beef & Mustard Sandwich has been repackaged in a newly designed recyclable pack. It features with crunchy lettuce on brown bread, and is made with the best quality ingredients including free range eggs and real butter. The company claims to support for the Farming for the Future project to support sustainable farming at no extra cost.

Claims:
Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Ethical - Animal

Woolworths Food Ready to Micro Garden Peas, Leeks & Baby Spinach (South Africa)

Woolworths Food Ready to Micro Garden Peas, Leeks & Baby Spinach is now available. The vegan product retails in a 180g pack.

Claims:
Ease of Use, Vegan, No Animal Ingredients, Microwaveable

Coop Betty Bossi Salad with Chicken & Asparagus (Switzerland)

Coop Betty Bossi Salat mit Poulet & Spargeln (Salad with Chicken & Asparagus) is now available. It contains green asparagus which is more aromatic than the white one since it grows out of the ground and becomes green thanks to the chlorophyll contained.

Claims:
N/A

Earthbound Farm Organic Power Deep Green Blends (USA)

Earthbound Farm Organic Power Deep Green Blends are new to the range. This USDA organic certified blend comprises a dynamic mix of tender baby kale, chard, and spinach. It does not require washing as it has been triple-washed, and can be enjoyed in salads, smoothies, or on pizzas.

Claims:
No Additives/Preservatives, Organic, Ethical - Environmentally Friendly Package, Ease of Use, Convenient Packaging, Social Media

Source: Mintel (2014)


Brussels
Sprouts.

Purchase and Consumption Behaviour

Average Purchase **2.9** times per month

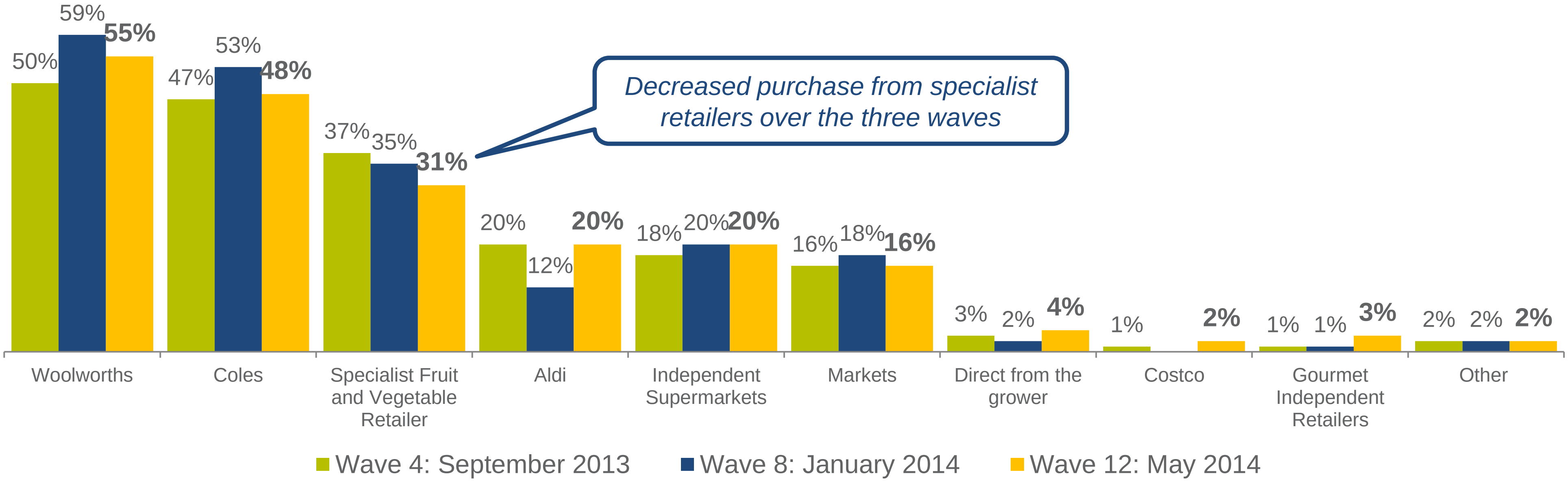
▲ 3.2 times, Wave 4
▲ 3.1 times, Wave 8

Average Consumption **5.5** times per month

▲ 5.8 times, Wave 4
▲ 6.2 times, Wave 8

- Across the three waves purchase and consumption frequency was relatively stable. Peak consumption was in January 2014, which is inconsistent with peak season (winter).
- Mainstream retailers, Woolworths and Coles, remained the key locations for purchase.

Purchase Channel



Q1. On average, how often do you purchase <commodity> ?
Q2. On average, how often do you consume <commodity>?
Q5. From which of the following channels do you typically purchase <commodity> ?
Sample Wave 4, N=319, Wave 8, N=293 and Wave 12, N=310

▼: 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 600g of Brussels Sprouts in May 2014, which was consistent with previous months.

- 0.6kg, Wave 4
- 0.7kg, Wave 8

Recalled last spend

The average recalled last spend was $3.70. This was in line with September last year, both of which were slightly lower than January 2014.

- $3.60, Wave 4
- $4.30, Wave 8

Value for money

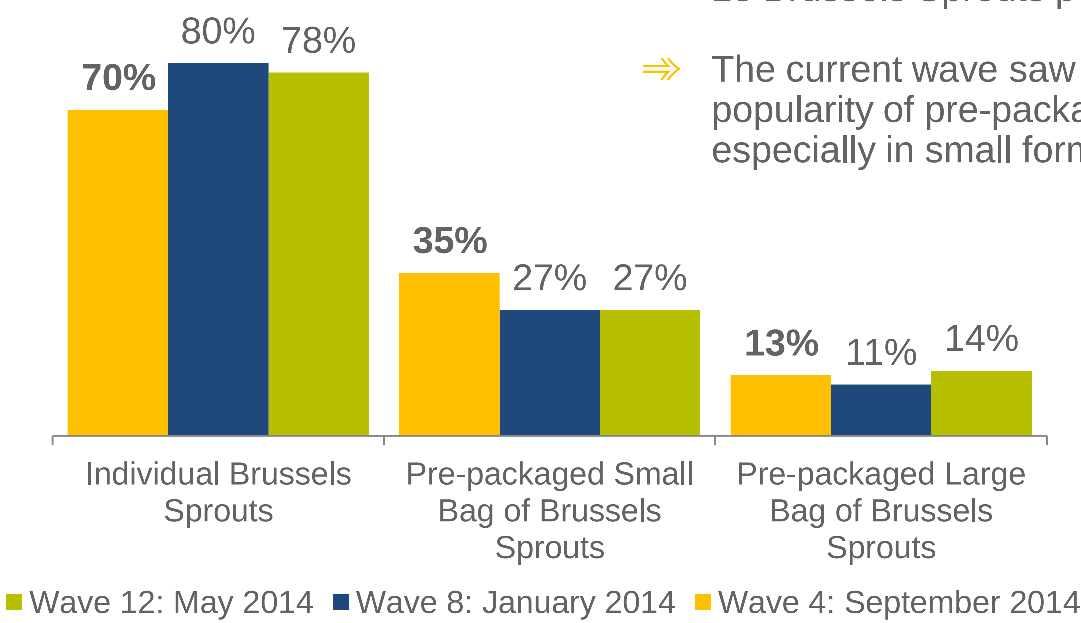
On average, consumers perceived Brussels Sprouts to be fair value for money (6.1/10). This had positively increased since Wave 8, but still lower Wave 4.

- 6.5/10, Wave 4
- 5.9/10, Wave 8

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 4, N=319, Wave 8, N=293 and Wave 12, N=310

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

Pack Formats Purchased



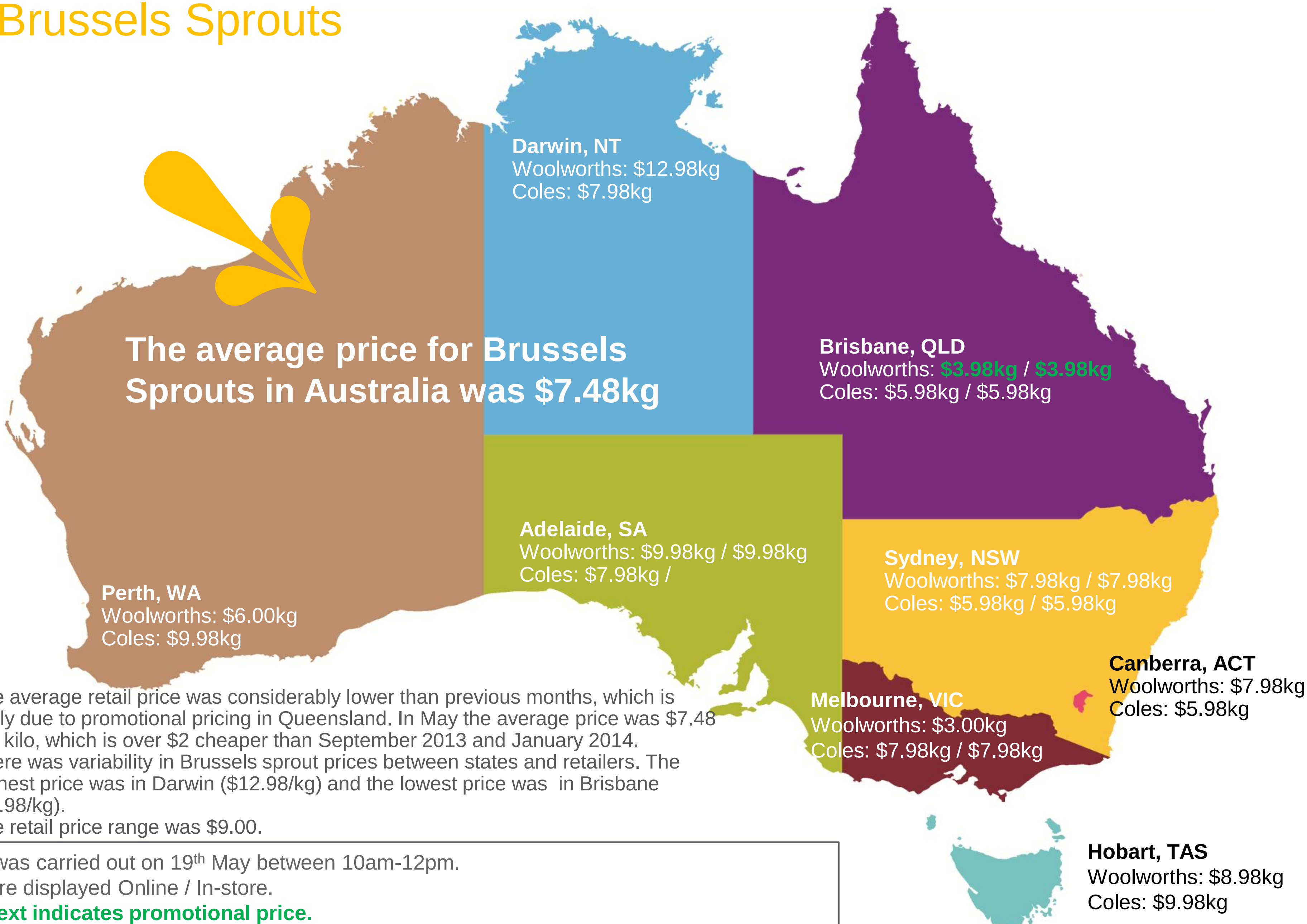
- Individual Brussels Sprouts were the main format purchased, consistent with previous months. On average, consumers' purchased 13 Brussels Sprouts per shop.
- The current wave saw an increase in the popularity of pre-packaged Brussels Sprouts, especially in small formats.

	Individual	Small Bag	Large Bag
Wave 12	12.9	2.0	3.1
Wave 8	13.1	2.8	2.8
Wave 4	12.7	2.8	2.9

Q3a. How much <commodity> does this typically equate to?
Sample Wave 4, N=319, Wave 8, N=293 and Wave 12, N=310

Online and In-store Commodity Prices

Brussels Sprouts



- The average retail price was considerably lower than previous months, which is likely due to promotional pricing in Queensland. In May the average price was $7.48 per kilo, which is over $2 cheaper than September 2013 and January 2014.
- There was variability in Brussels sprout prices between states and retailers. The highest price was in Darwin ($12.98/kg) and the lowest price was in Brisbane ($3.98/kg).
- The retail price range was $9.00.

Pricing was carried out on 19th May between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates promotional price.

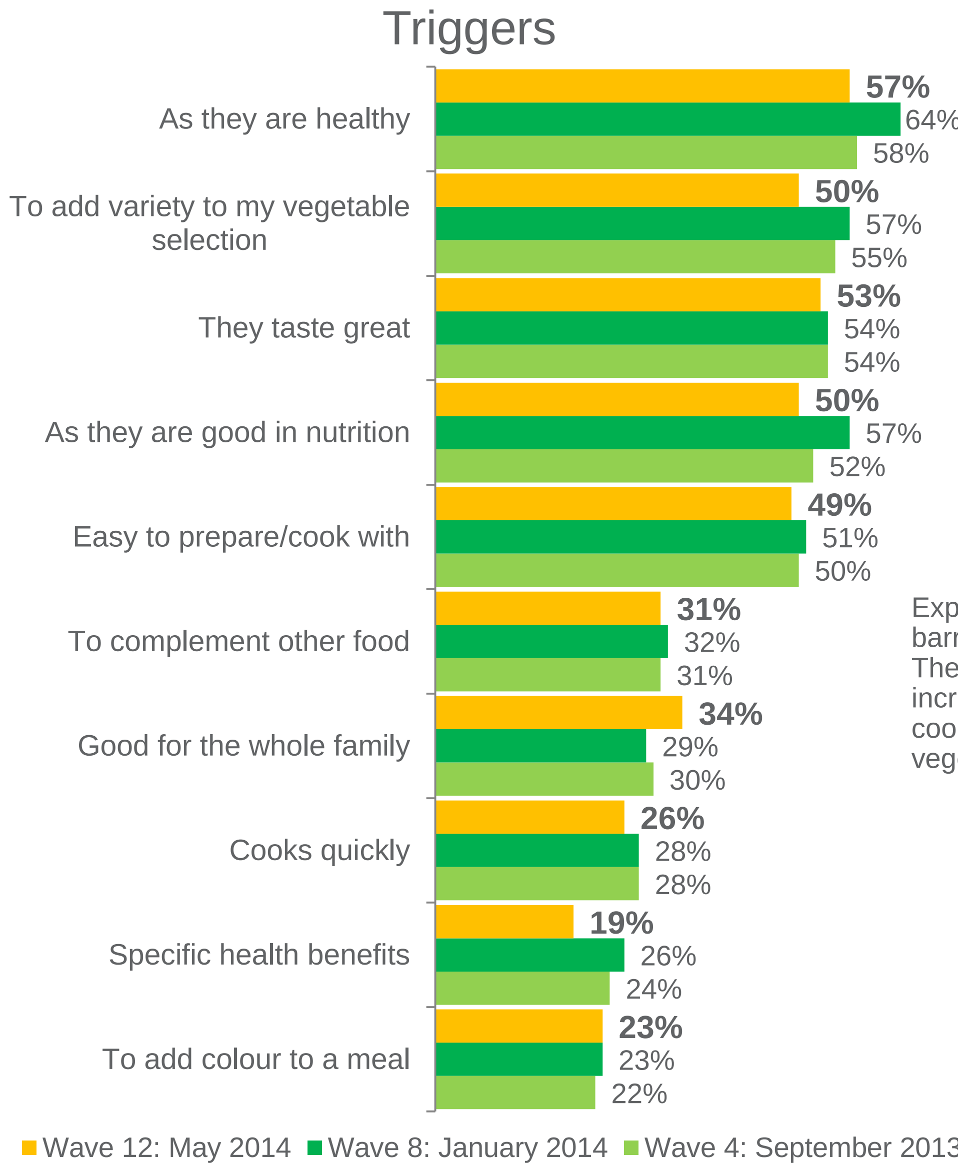
Spontaneous Awareness & Purchase

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

“I didn't know there were any different types - I thought they were just ‘Brussels sprouts'.”

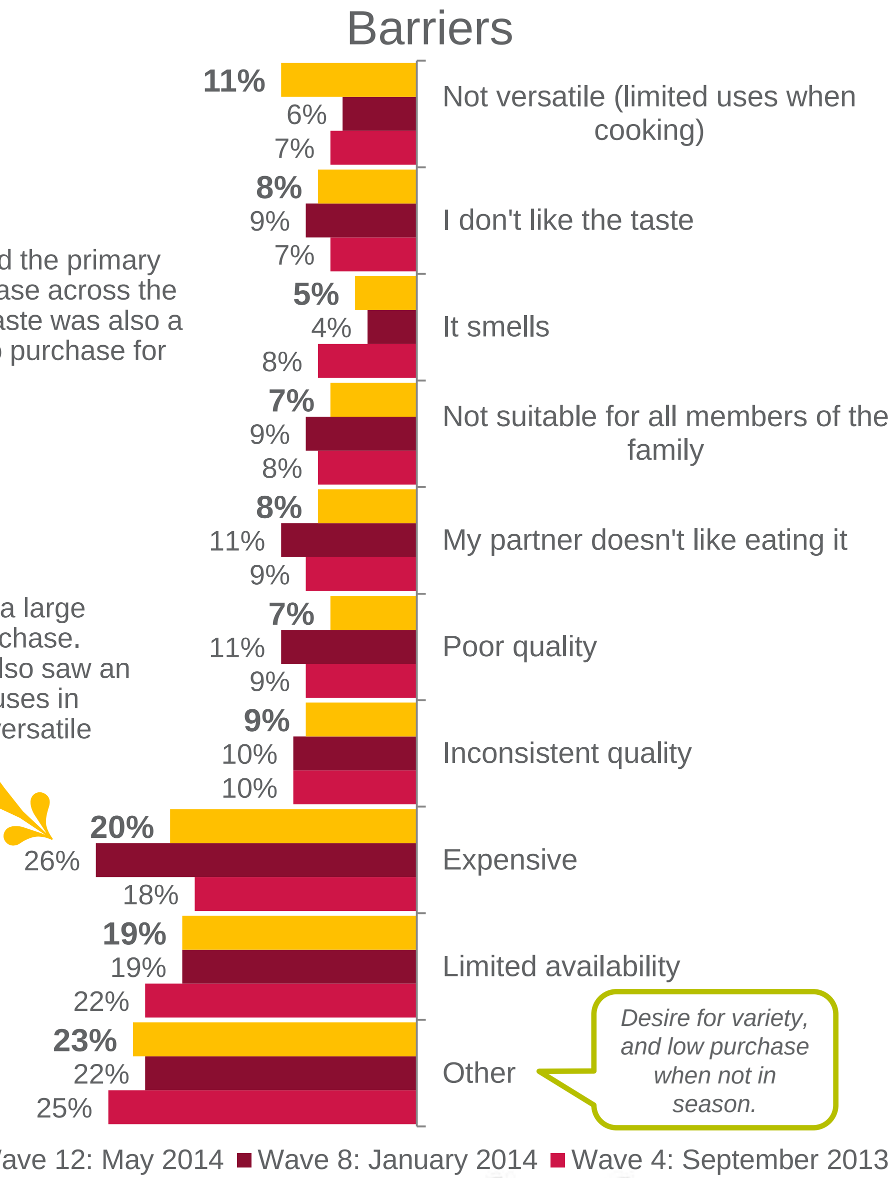
Sample Wave 4, N=319, Wave 8, N=293 and Wave 12, N=310
Q6a. What varieties of <commodity> are you aware of? (unprompted)

Triggers & Barriers to Purchase



Health remained the primary trigger to purchase across the three waves. Taste was also a strong trigger to purchase for consumers.

Expense remained a large barrier to future purchase. The current wave also saw an increase in limited uses in cooking and not a versatile vegetable.



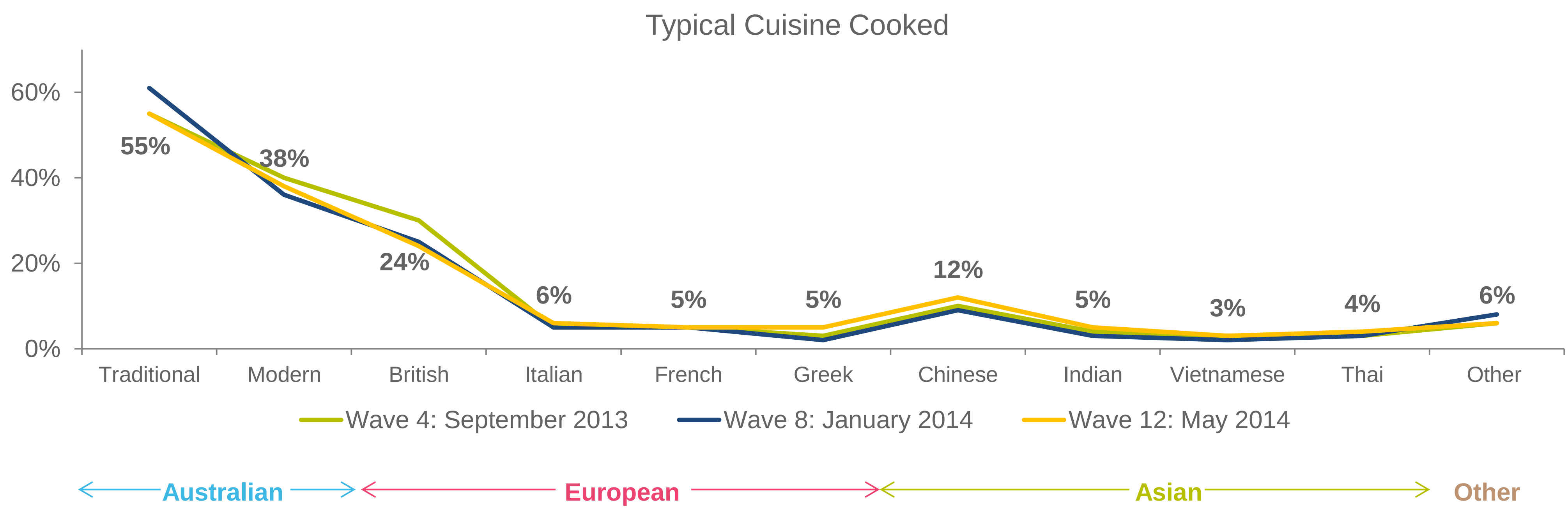
Sample Wave 4, N=319, Wave 8, N=293 and Wave 12, N=310
Q7. Which of the following reasons best describes why you purchase <commodity> ?
Q8. Which reason best describes why you don't buy <commodity> more often?

Cooking Cuisine and Occasions

- Dinner was consistently the main consumption occasions, for both weekdays and weekends.
- Traditional Australian cuisine was the most common cooking style. Cuisine choice was relatively consistent across the three waves.

Wave 12 Top 5 Consumption Occasions

	Wave 12	Wave 8	Wave 4
Weekday dinner	**62%**	▼	▼
Weekend dinner	**39%**	▼	▼
Family meals	**30%**	▼	▲
Everyday meals	**25%**	▲	▲
Quick meals	**17%**	▼	▼

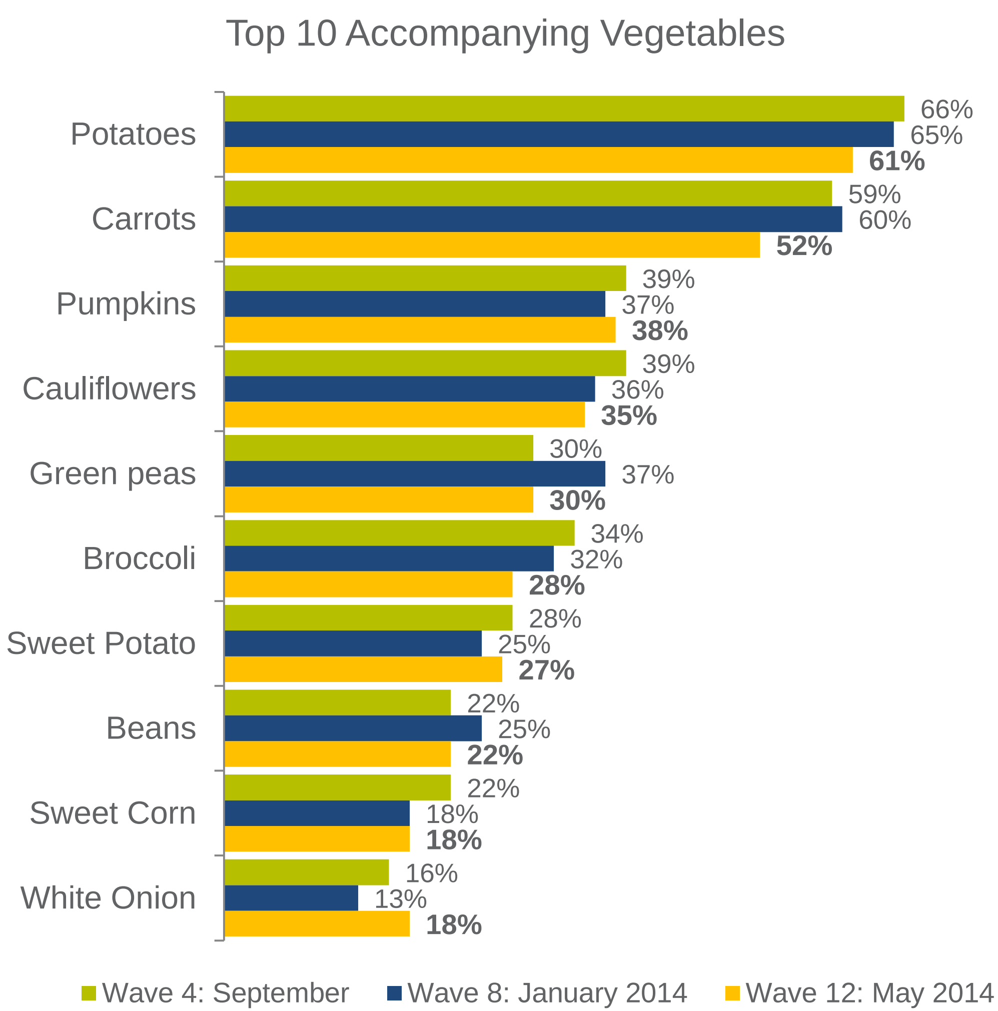


Sample Wave 4, N=319, Wave 8, N=293 and Wave 12, N=310
Q10. What cuisines do you cook/consume that use <commodity> ?
Q11. Which of the following occasions do you typically consume/use <commodity> ?

colmar brunton.

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

Cooking Preferences



- Brussels Sprouts were often served with potatoes and carrots, which was on trend with the last two waves.
- Overall, the accompanying vegetables were consistent across months.
- The majority of consumers either steamed or boiled their Brussels sprouts to cook them.

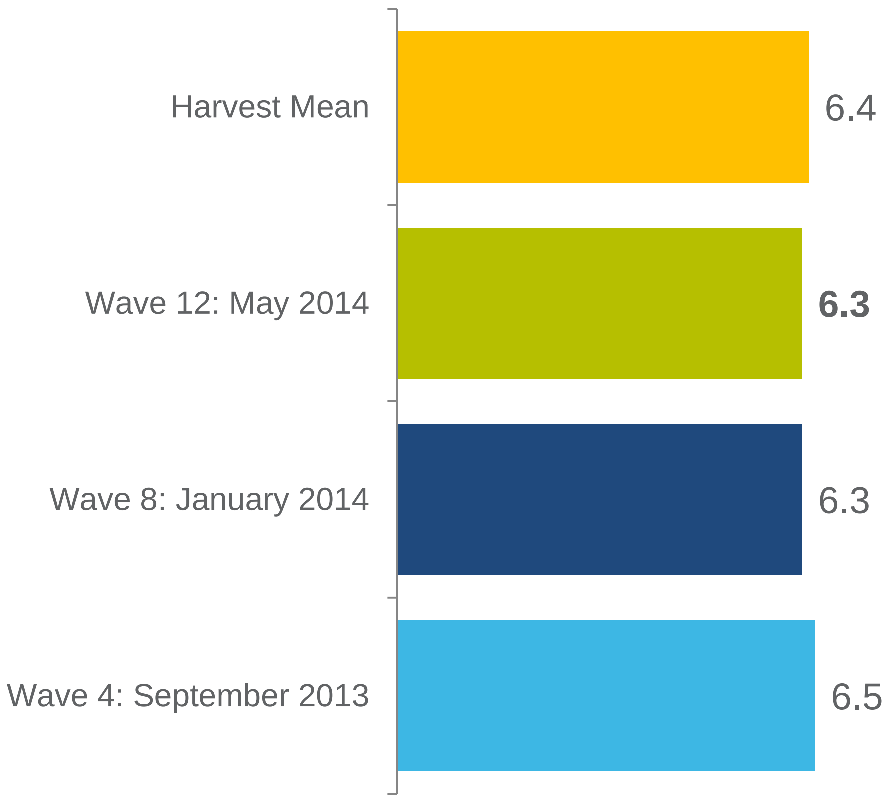
Top Cooking Styles

	Wave 4	Wave 8	Wave 12
Steaming	57%	54%	54%
Boiling	41%	44%	37%
Microwave	22%	21%	22%
Stir frying	16%	16%	22%
Sautéing	10%	12%	16%
Roasting	8%	8%	12%
Stewing	8%	6%	11%
Soup	8%	6%	10%
Blanche	7%	6%	7%
Baking	6%	1%	6%

Sample Wave 4, N=319, Wave 8, N=293 and Wave 12, N=310
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

- Overall, importance of provenance had remained consistent across waves, with a high level of importance to consumers. This was on trend with the Harvest mean for all commodities tracked.



AUSTRALIAN MADE®

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

Q14. When purchasing <commodity>, how important is Provenance to you?
Mean scores out of 10.
Sample Wave 4, N=319, Wave 8, N=293 and Wave 12, N=310

Freshness and Longevity

Expected to stay fresh for **8.6** days

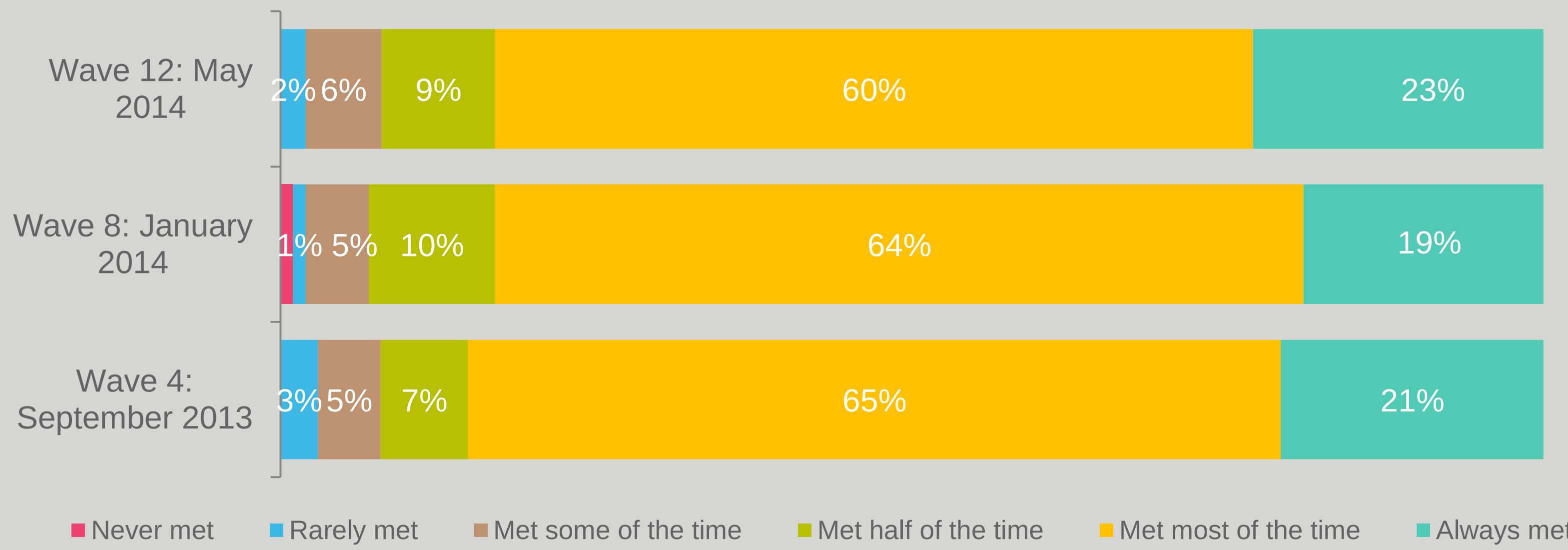
▼ 8.2 days, Wave 4

▼ 8.2 days, Wave 8

⇛ Consumers expected Brussels Sprouts to stay fresh for over eight days once purchased. This was consistent with previous months.

⇛ This month saw an increase in expectations of freshness always being met, which is a positive trend for Brussels Sprouts.

Expectations Met



Sample Wave 4, N=319, Wave 8, N=293 and Wave 12, N=310

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.

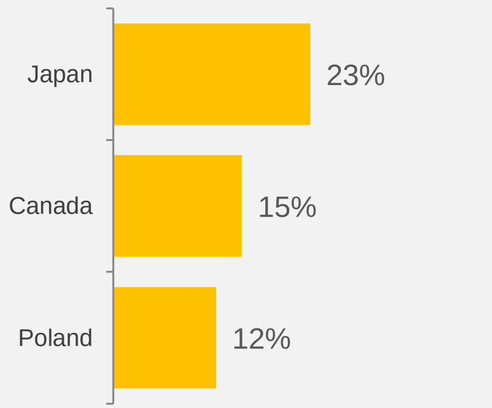
Trends:
Brussels Sprouts

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

Brussels Sprouts Global NPDs
November 2013 – January 2014

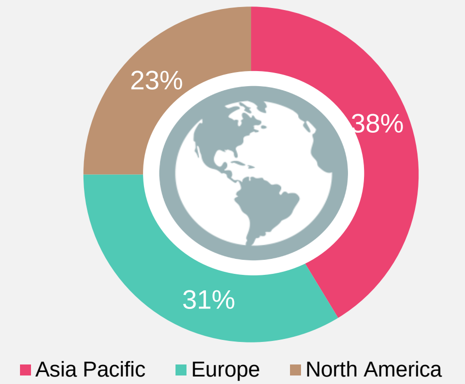
There were 26 global launches of products containing Brussels sprouts as an ingredient, up from 15 from the previous wave. The majority of launches were predominantly juice drinks in Japan, which is also consistent from the previous wave.

Country

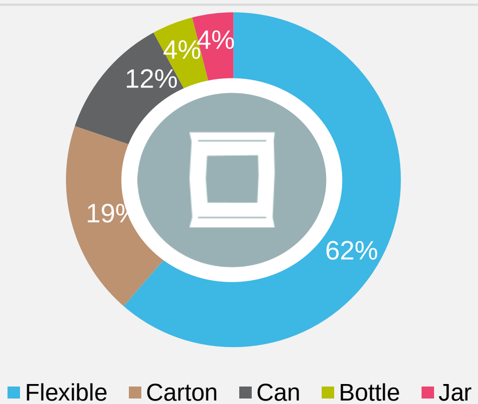


26 Global Launches

Region



Top Pack Formats



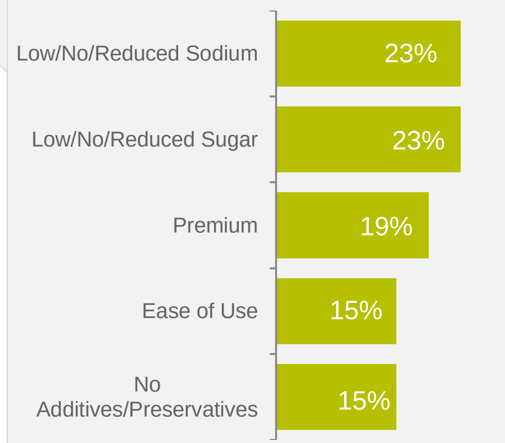
Categories

Fruit & Vegetables 46%

Juice Drinks 31%

Hot Beverages 12%

Top Claims



Brussels Sprouts Product Launches:
Last 3 Months (March – May 2014)
Summary

- There were 26 products launched globally that contained Brussels sprouts as an ingredient in the last three months, which was an increase from 15 products in the previous trends analysis.
- No products were launched in Australia.
- Products were launched predominately in Japan (23%).
- The vast majority of launches were in flexible pack formats (62%) which represents a move away from cartons in the previous trends analysis (47%).
- The main category launches were within fruit & vegetables (46%) and juice drinks (31%) which is a move away from baby food (33%) in the previous trends analysis.
- The most used claims for products launched were health orientated, including reduced sugar (23%) and reduced sodium (23%), which is consistent from previous trends analysis.
- Marks & Spencer ActiveHealth Selenium Enriched Shredded Brussels Sprouts (Ireland) represented the greatest innovation in the category. These Brussels sprouts are grown in selenium enriched soil for added nutrients.

Source: Mintel (2014)

Innovative Brussels Sprouts Launches:
L3M (March – May 2014)

Kagome Original Vegetable & Fruit Juice (Thailand)

Kagome Original Vegetable & Fruit Juice consists of 100% vegetable and fruit mixed juice from vegetable and fruit concentrate. The product retails in a 184ml pack.

Claims:
N/A

Green Giant Steamers Baby Brussels Sprouts & Butter Sauce (USA)

Green Giant Steamers Baby Brussels Sprouts & Butter Sauce is now available. The microwaveable product retails in a 19-oz. family pack that features a Box Tops for Education coupon.

Claims:
Microwaveable

Poltino Grandma's Soup Vegetable Mix (Poland)

Poltino Zupa Babuni (Grandma's Soup Vegetable Mix) is a vegetable mix to prepare a soup in 10 minutes. The product retails in a 450g pack.

Claims:
N/A

Kagome Yasai Ichinichi Kore Ippon 100% Vegetable Juice (Japan)

Kagome Yasai Ichinichi Kore Ippon 100% Vegetable Juice has been repackaged. It contains 350g equivalent of 30 types of vegetables. It is naturally rich in dietary fibre, calcium, beta-carotene and lycopene, and is free from flavouring, added salt and sugar.

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

Source: Mintel (2014)

Innovative Brussels Sprouts Launches:
L3M (March – May 2014)

Marks & Spencer ActiveHealth Selenium Enriched Shredded Brussels Sprouts (Ireland)

Marks & Spencer ActiveHealth Selenium Enriched Shredded Brussels Sprouts are now available. These ready-to-cook sprouts have been grown in selenium enriched soils. Selenium is considered essential for a healthy immune system. These shredded Brussels sprouts can be steamed or stir-fried, and retail in a 240g pack.

Claims:
Ease of Use, Vitamin/Mineral Fortified, Immune System (Functional)

Hak Brussels Sprouts (Netherlands)

Hak Brusselse Spruitjes (Brussels Sprouts) have been repackaged. They are fresh from the land, contain no preservatives and retail in a 450g recyclable and easy to open pack.

Claims:
No Additives/Preservatives, High/Added Fiber, Ethical - Environmentally Friendly Package, Time/Speed, Convenient Packaging, Low/No/Reduced Sodium

Earth Exotics Brussel Sprouts (Hong Kong)

Earth Exotics Brussel Sprouts are washed and ready to use. The low in fat, premium product contains no cholesterol or added preservatives. The all natural brussel sprouts are HACCP certified, microwaveable and retail in a newly designed 227g pack featuring a recipe suggestion.

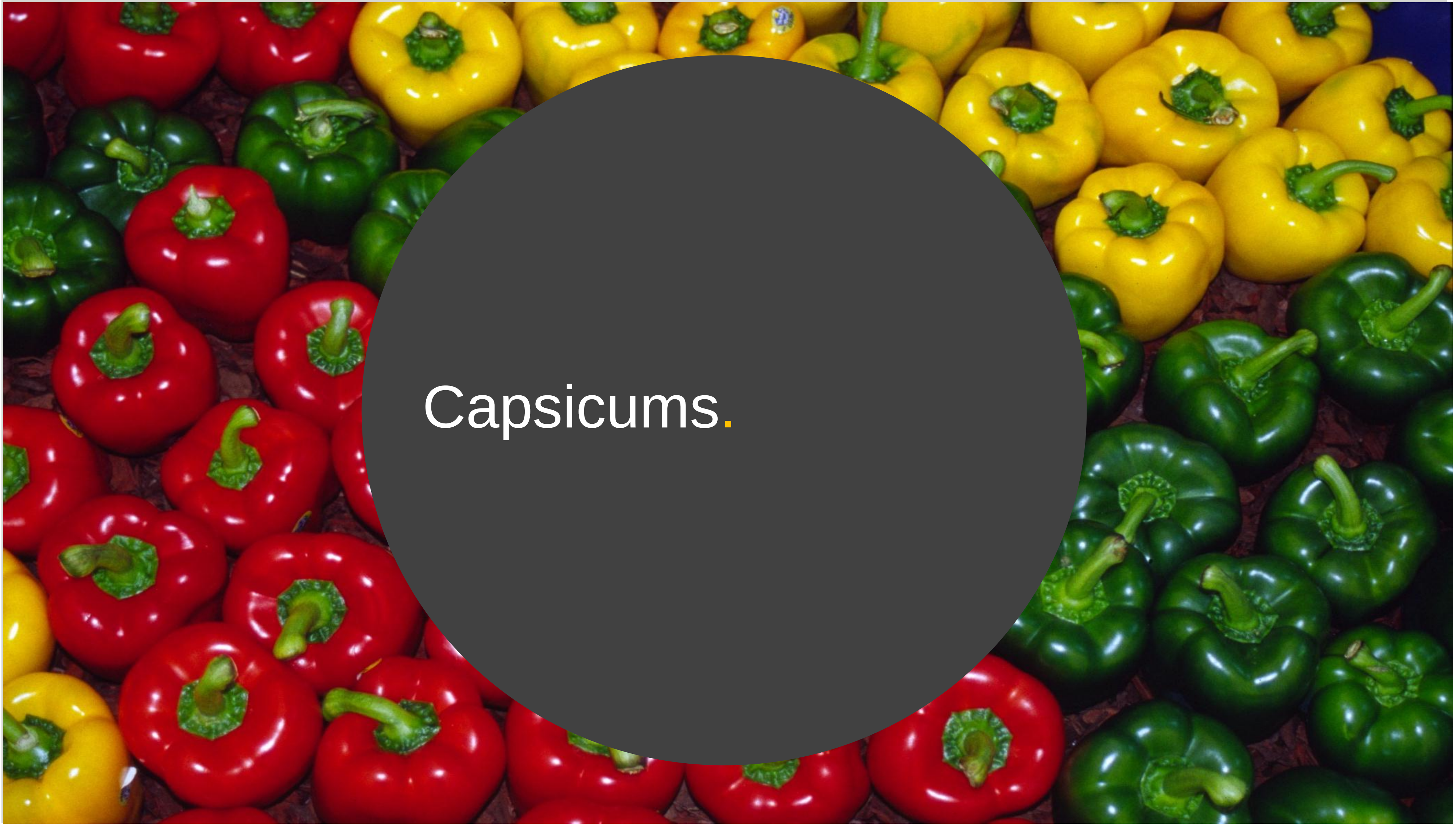
Claims:
No Additives/Preservatives, All Natural Product, Low/No/Reduced Cholesterol, Low/No/Reduced Fat, Microwaveable, Ease of Use, Premium

Kwidzyn Vegetable Mix for Steaming (Poland)

Kwidzyn Warzywa na Parze (Vegetable Mix for Steaming) are said to come from controlled agriculture. The product can be served as a side dish and retails in a 450g pack.

Claims:
N/A

Source: Mintel (2014)



Capsicums.

Purchase and Consumption Behaviour

Average Purchase **4.2** times per month

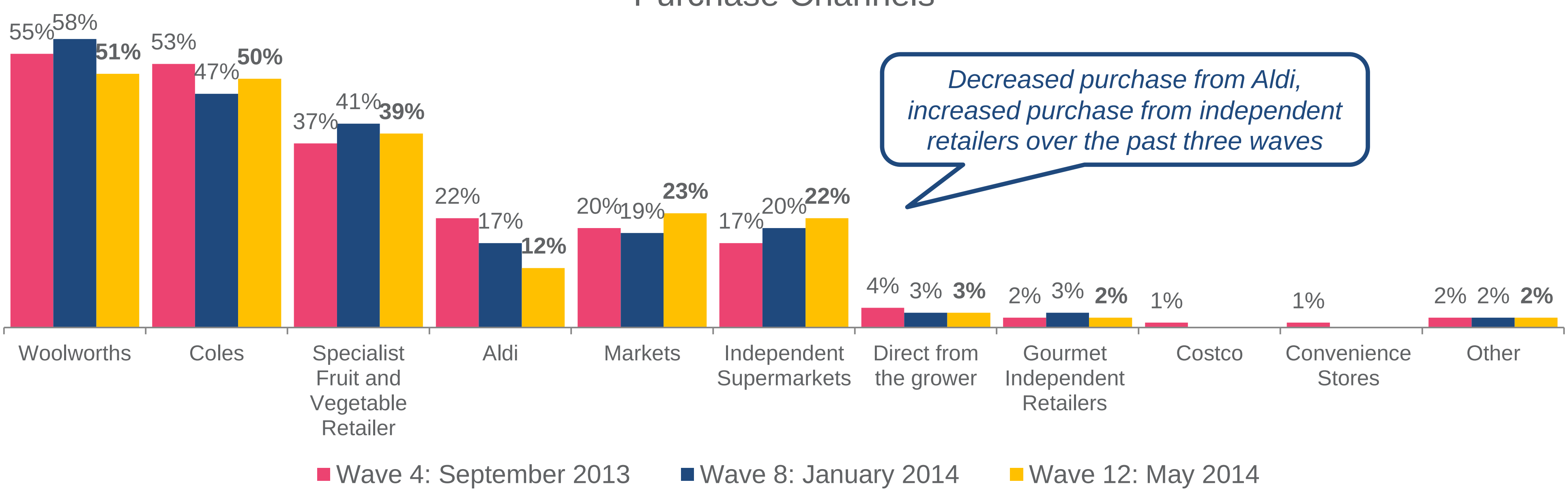
▲ 4.4 times, Wave 4
▬ 4.2 times, Wave 8

Average Consumption **10.5** times per month

▼ 10.3 times, Wave 4
▼ 10.2 times, Wave 8

- Purchase and consumption frequency was consistent with previous waves. Capsicum is typically consumed twice per week.
- Capsicum was generally purchased from mainstream and specialist retailers.
- Over the three waves there has been a consistent increase in purchase from independent supermarkets.

Purchase Channels



Q1. On average, how often do you purchase <commodity>?
Q2. On average, how often do you consume <commodity>?
Q5. From which of the following channels do you typically purchase <commodity>?
Sample Wave 4, N=499, Wave 8, N=313 and Wave 12, N=315

colmar brunton.

▼: 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 600g of Capsicum in May 2014, this was on trend with past months.

▲ 0.7kg, Wave 4
▲ 0.7kg, Wave 8

Recalled last spend

The average recalled last spend on Capsicum was $3.90. This was in line with past waves.

– $3.90, Wave 4
▲ $4.00, Wave 8

Value for money

On average, consumers perceived Capsicum to be fair value for money (5.6/10). Over the three waves this has consistently decreased.

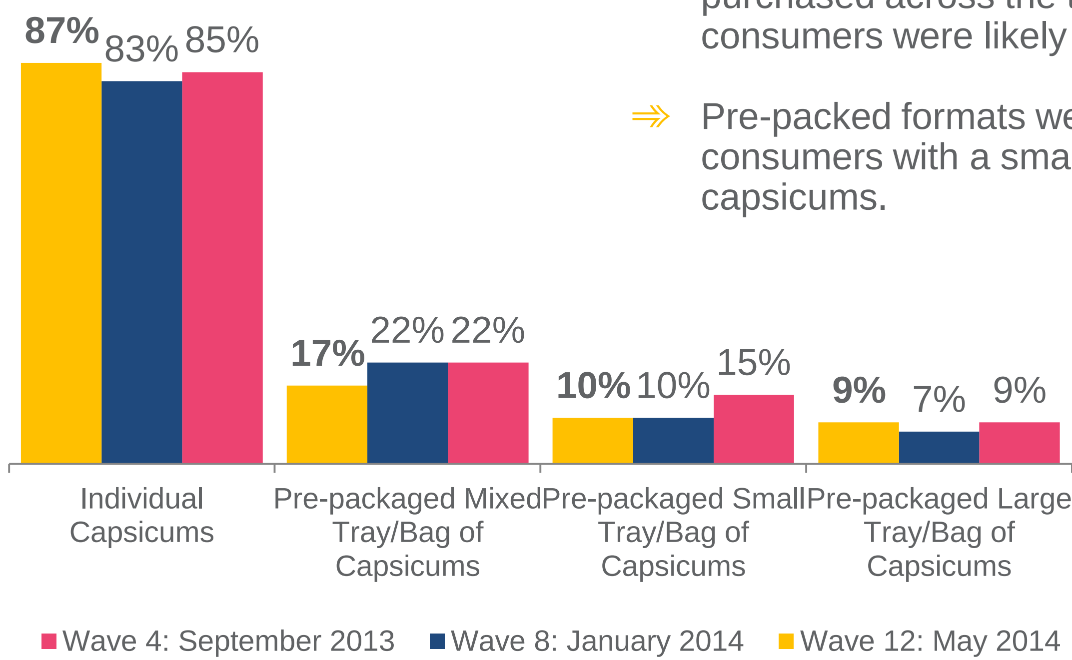
▲ 6.3/10, Wave 4
▲ 5.8/10, Wave 8

Decreased value for money over past waves, however no increase in recalled last spend. Other factors influencing perception of value

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?

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

Pack Formats Purchased



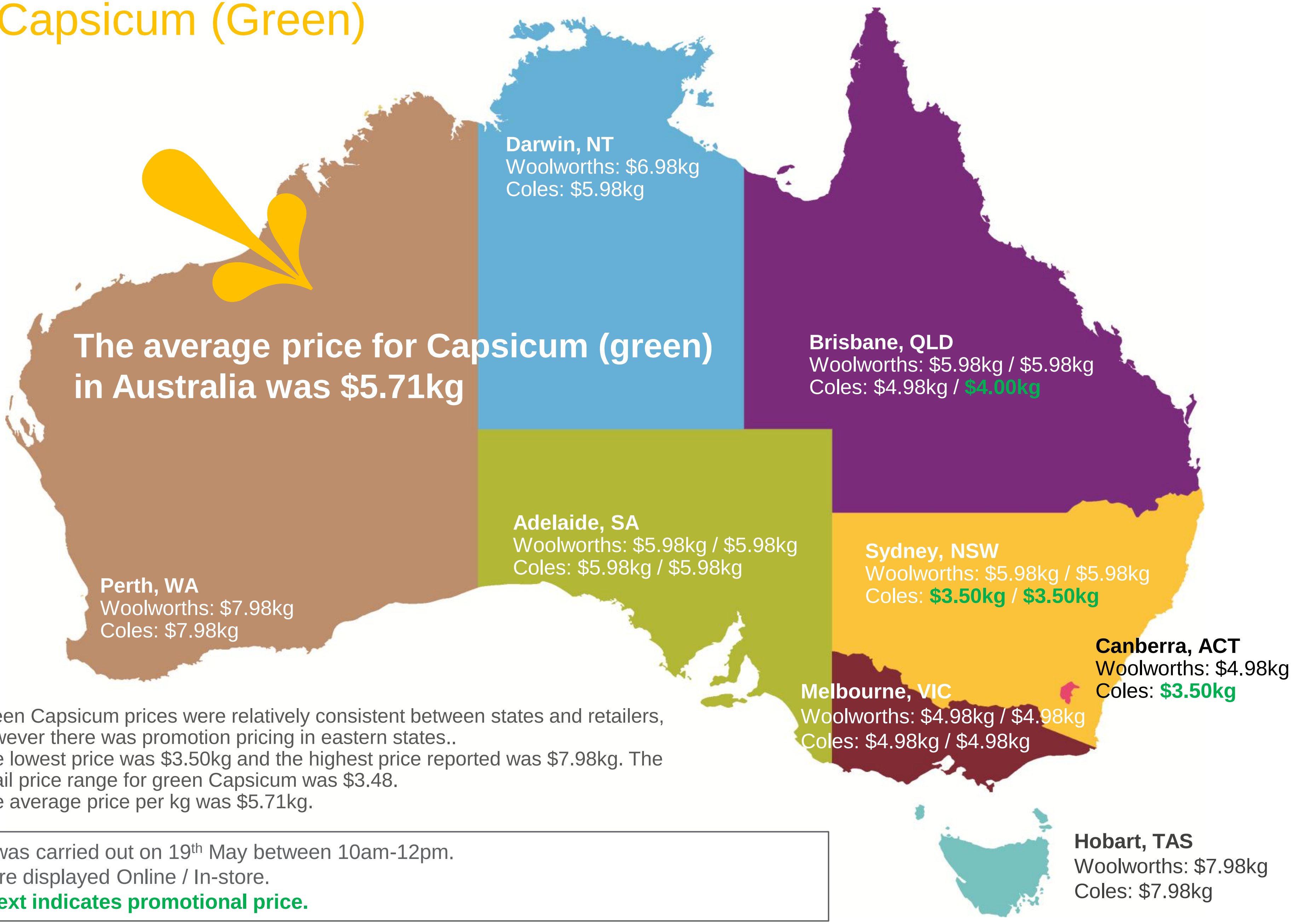
- Individual capsicums were the most popular format purchased across the three waves. Per shop, consumers were likely to buy 2-3 capsicums.
- Pre-packed formats were not very important to consumers with a small minority buying trays of capsicums.

	Individual	Mixed Tray	Small Tray	Large Tray
Wave 12	2.4	1.4	1.8	1.6
Wave 8	2.6	1.8	1.8	2.3
Wave 4	2.5	1.6	1.7	1.8

Q3a. How much <commodity> does this typically equate to?
Sample Wave 4, N=499, Wave 8, N=313 and Wave 12, N=315

Online and In-store Commodity Prices

Capsicum (Green)



- Green Capsicum prices were relatively consistent between states and retailers, however there was promotion pricing in eastern states..
- The lowest price was $3.50kg and the highest price reported was $7.98kg. The retail price range for green Capsicum was $3.48.
- The average price per kg was $5.71kg.

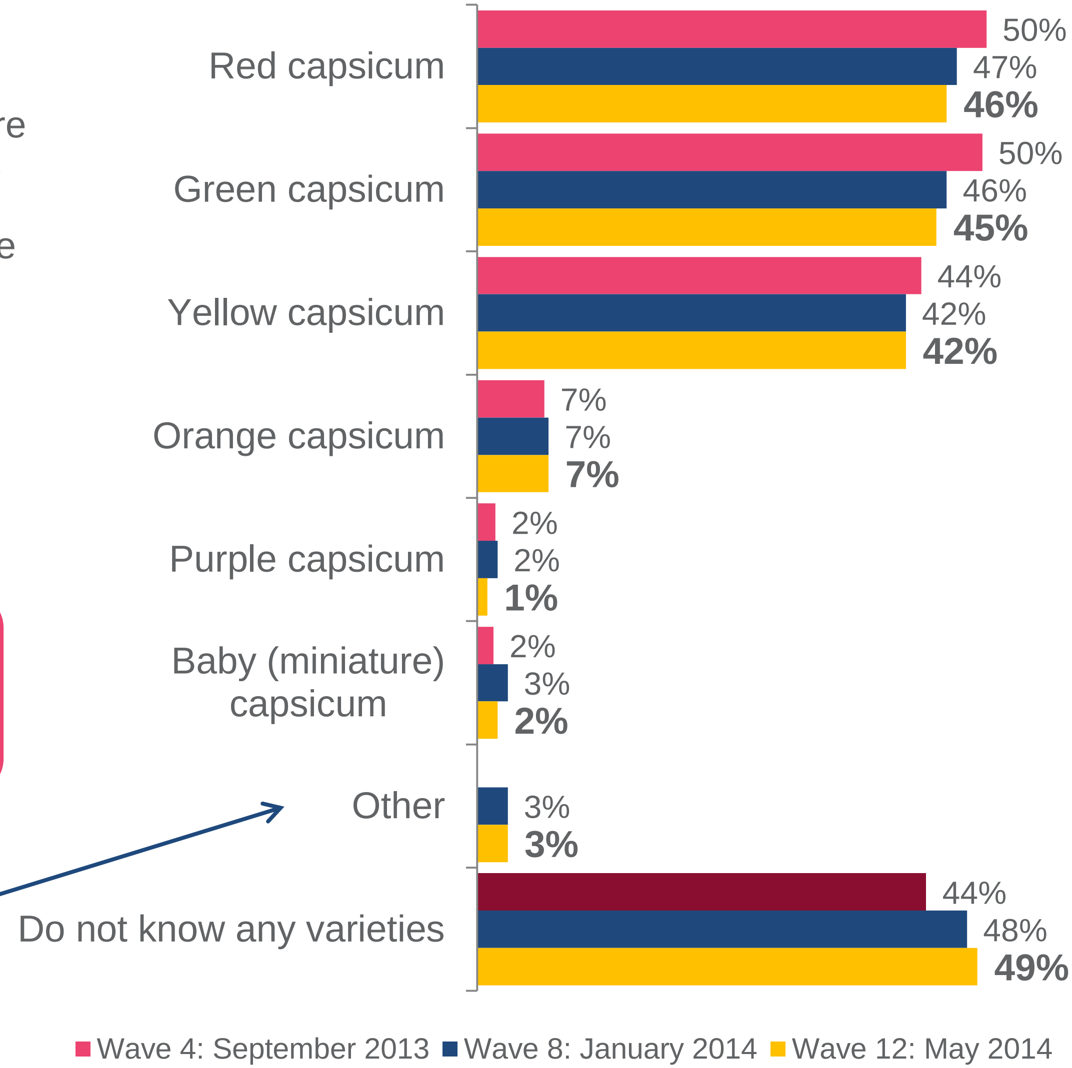
Pricing was carried out on 19th May between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates promotional price.

Spontaneous Awareness

- From the first wave to now, consumers were less likely to state a type of capsicum. This might be because more consumers understand that colour is not actually a type of capsicum (see quote below).
- Red, green and yellow capsicums had the highest level of recall, which was relatively stable across the three waves.

'All I know here are the colours, which I think mainly represent stages of ripeness.'

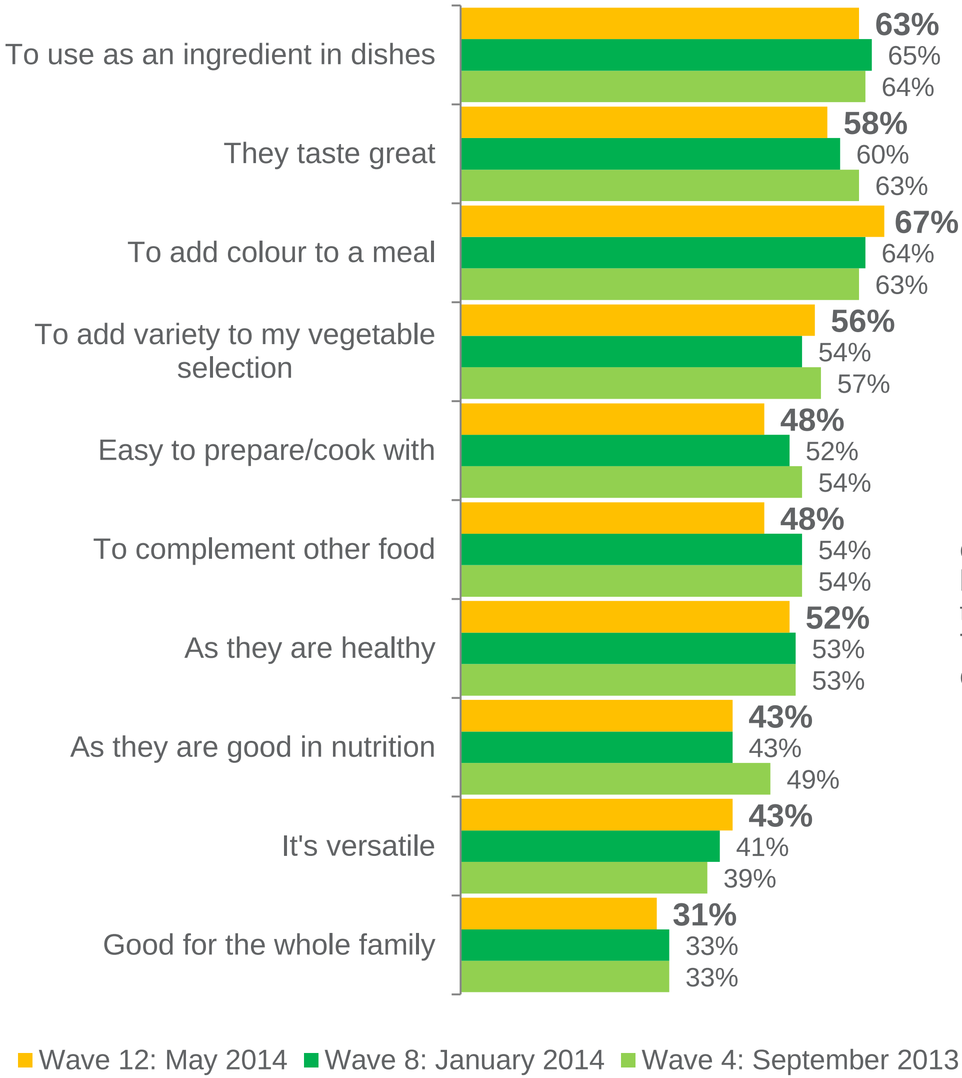
Respondents recalled specific varieties of chillies.



Sample Wave 4, N=499, Wave 8, N=313 and Wave 12, N=315
Q6a. What varieties of <commodity> are you aware of? (unprompted)

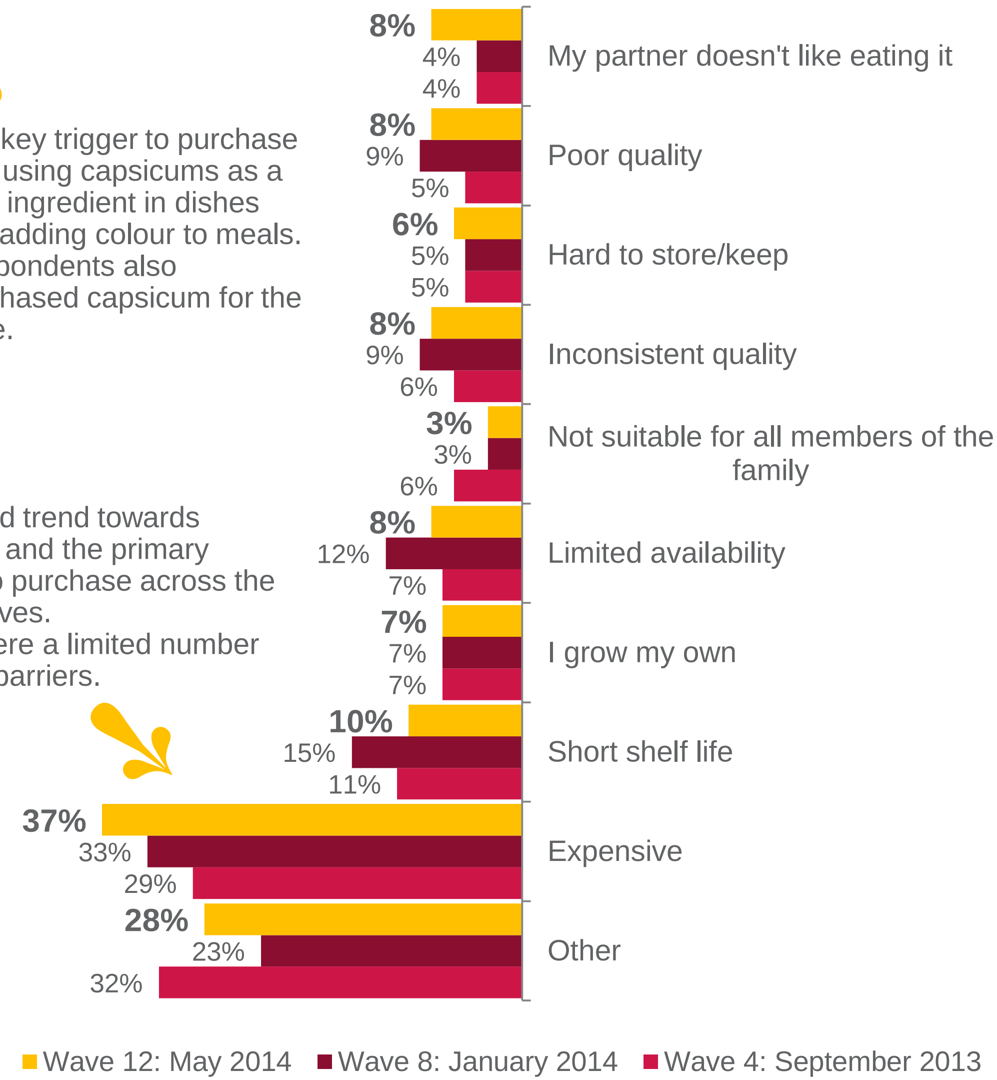
Triggers and Barriers to Purchase

Triggers



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

Barriers



Increased trend towards expense and the primary barrier to purchase across the three waves.
There were a limited number of other barriers.

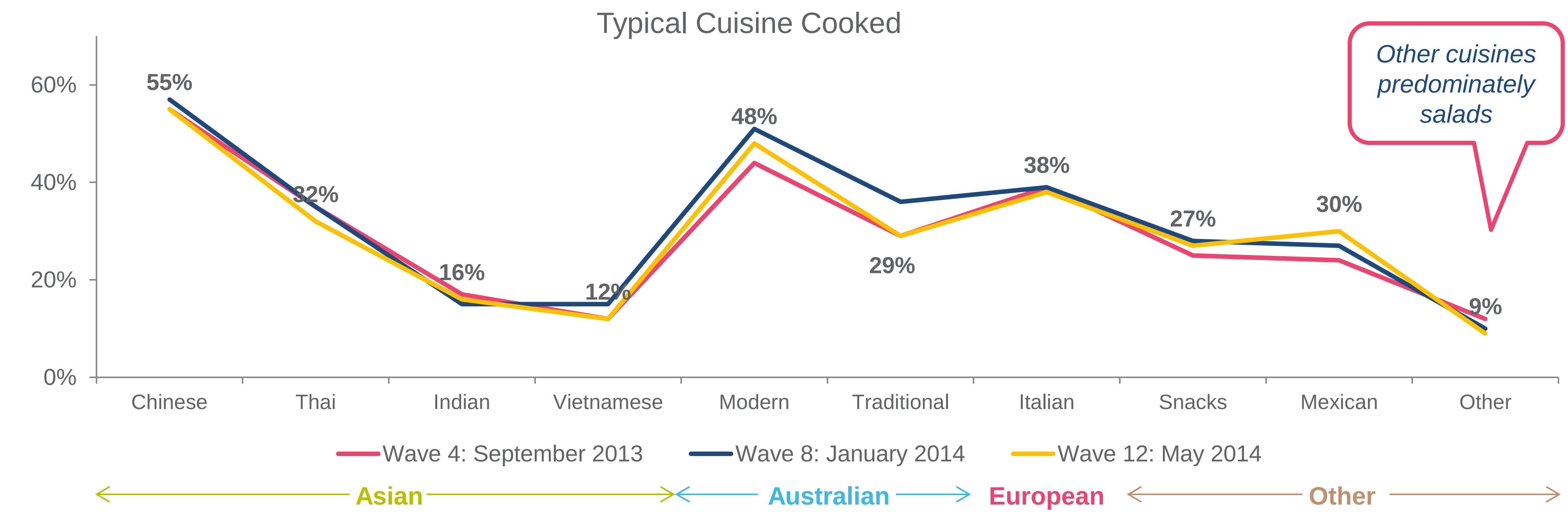
Sample Wave 4, N=499, Wave 8, N=313 and Wave 12, N=315
Q7. Which of the following reasons best describes why you purchase <commodity>?
Q8. Which reason best describes why you don't buy <commodity> more often?

Cooking Cuisine and Occasions

- Asian cuisine remained a popular choice when cooking with capsicum.
- Across the three waves there was a consistent increase in cooking Mexican cuisine and modern Australian.
- Dinners were the main consumption occasions along with quick meals.

Wave 12 Top 5 Consumption Occasions

	Wave 12	Wave 8	Wave 4
Weekday dinner	**54%**	▲	▲
Quick meals	**41%**	▲	▼
Weekend dinner	**39%**	–	–
Everyday meals	**38%**	▼	▼
Family meals	**37%**	▲	▲

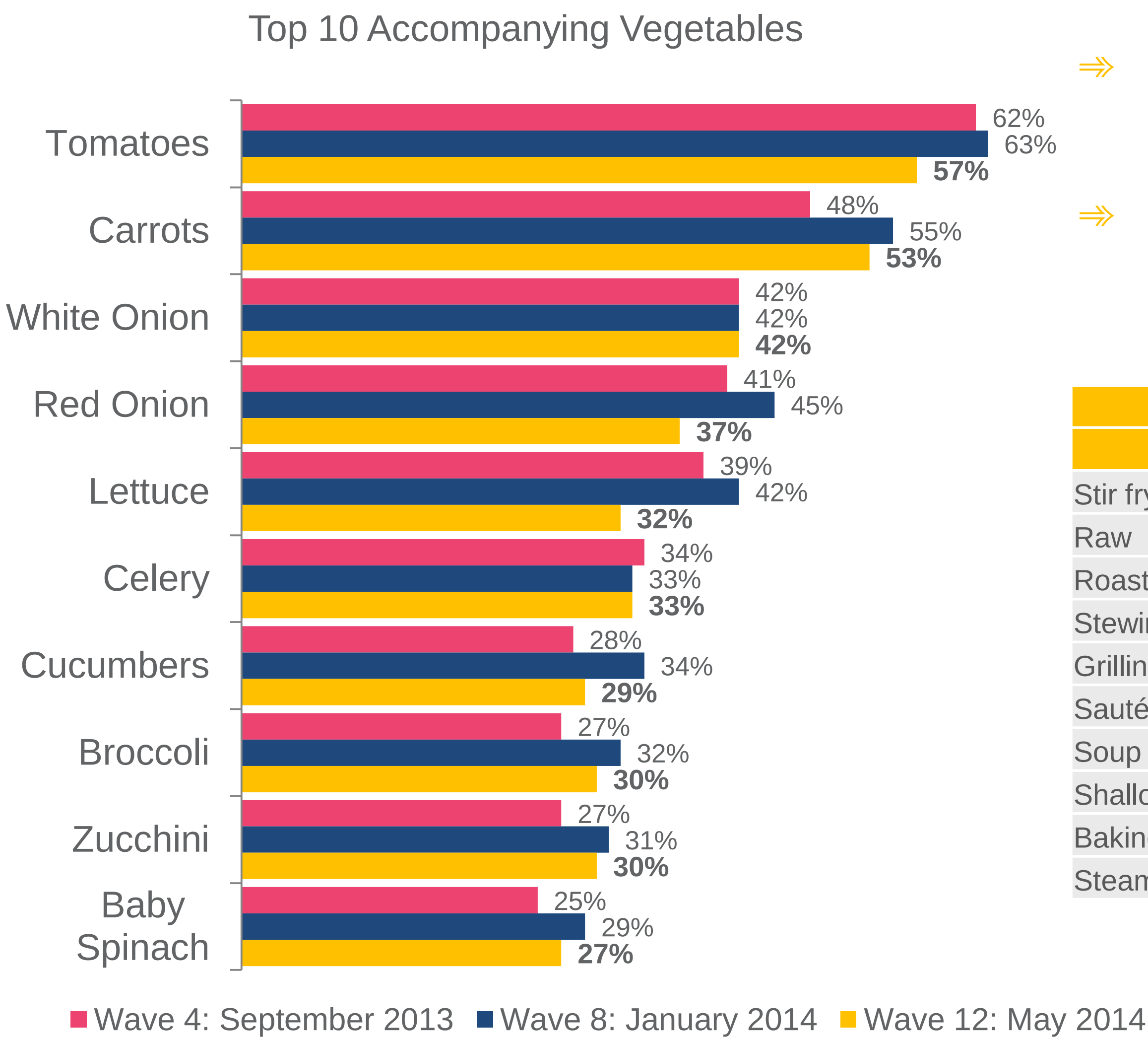


Sample Wave 4, N=499, Wave 8, N=313 and Wave 12, N=315
Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?

colmar brunton.

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

Cooking Preferences



- Capsicum was typically served with tomatoes and carrots. Accompanied vegetables was relatively consistent over the three waves.
- On trend with Asian cuisine, the main cooking technique for capsicum was stir-frying. Over half of respondents also consumed capsicum raw.

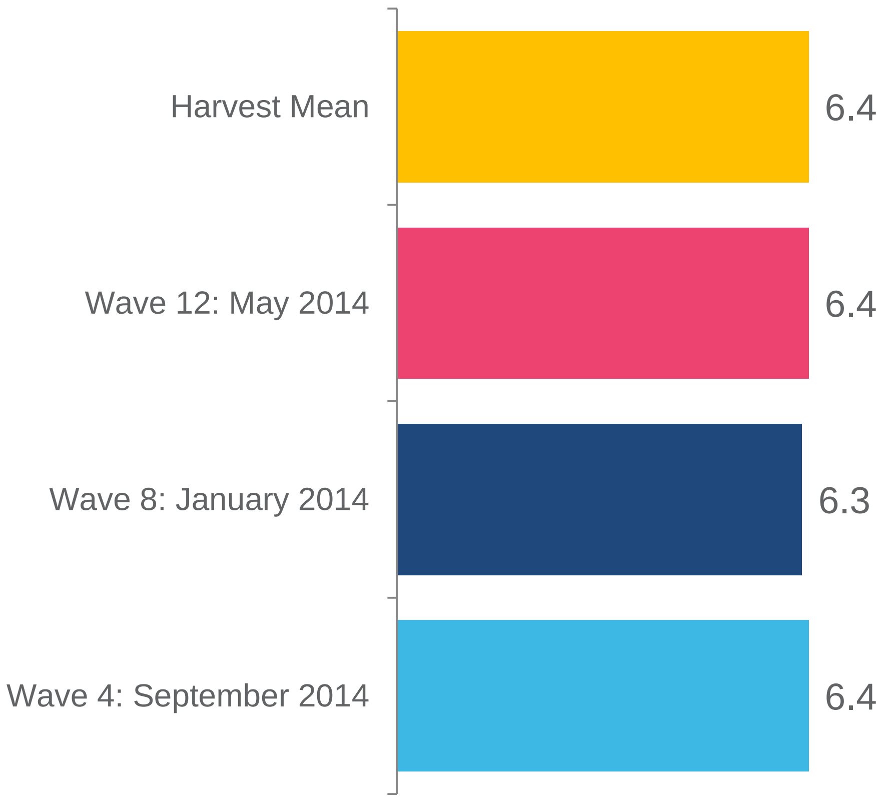
Top 10 Cooking Styles

	Wave 4	Wave 8	Wave 12
Stir frying	73%	77%	74%
Raw	58%	55%	53%
Roasting	32%	28%	28%
Stewing	21%	16%	20%
Grilling	20%	21%	24%
Sautéing	19%	20%	23%
Soup	17%	12%	16%
Shallow Frying	15%	12%	12%
Baking	15%	19%	18%
Steaming	13%	12%	10%

Sample Wave 4, N=499, Wave 8, N=313 and Wave 12, N=315
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

- The provenance of Capsicums has remained important to Australian consumers across the three waves, on trend with the Harvest mean for all vegetables evaluated.



AUSTRALIAN MADE®

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

Q14. When purchasing <commodity>, how important is Provenance to you?
Mean scores out of 10.
Sample Wave 4, N=499, Wave 8, N=313, Wave 12, N=315

Freshness and Longevity

Expected to stay fresh for **8.2** days

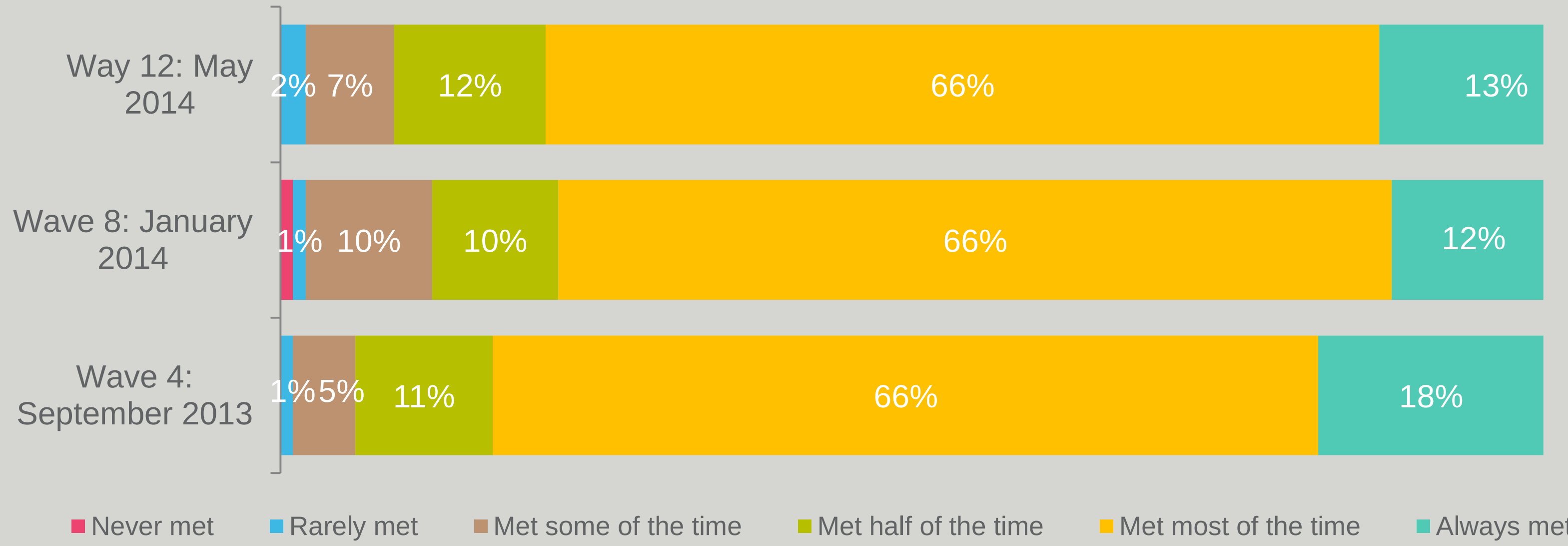
▼ 8.1 days, Wave 4

▼ 7.9 days, Wave 8

⇛ Over the three waves, Capsicum was consistently expected to remain fresh for eight days after purchase.

⇛ Two thirds of consumers said their expectations of freshness were met most of the time. Peak freshness over the three waves was September 2013, where expectations of freshness were more frequently met.

Expectations Met



Sample Wave 4, N=499, Wave 8, N=313 and Wave 12, N=315
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: Capsicums

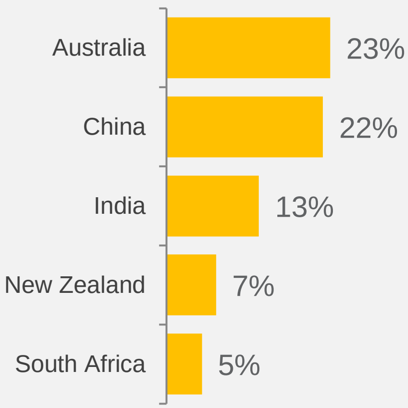
**Mintel search term was Capsicum*

Capsicum Global NPDs

March – May 2014

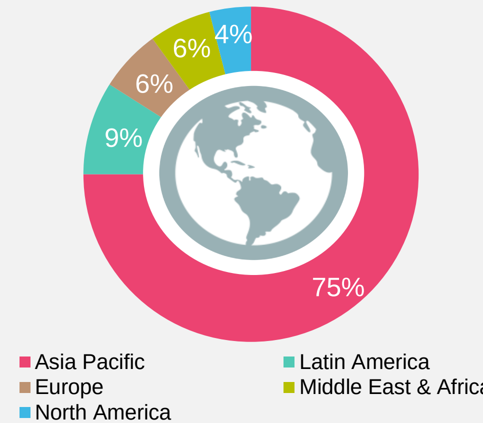
There were 159 global launches containing capsicum as an ingredient in the last three months. Asia Pacific was the key region for launches, specifically Australia, China and India. Top category launches were snacks, meals and sauces.

Country

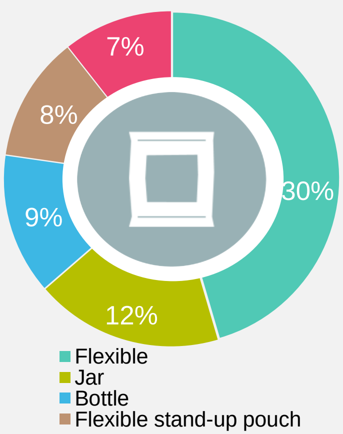


159 Global Launches

Region



Top Pack Formats



Categories

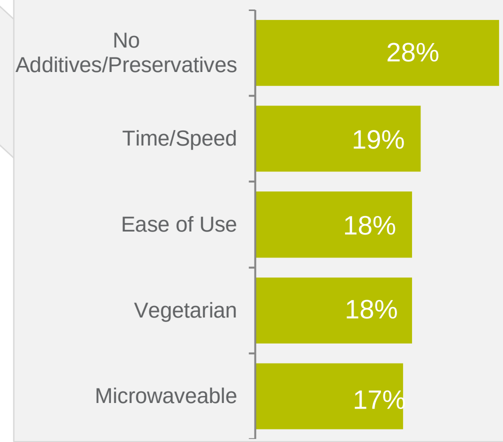
Snacks 20%

Meals 18%

Sauces 18%

Processed Products 12%

Top Claims



Capsicum Product Launches:
Last 3 Months (March – May 2014)
Summary

- There were 159 products launched globally in the last three months that contained capsicum (capsicum, specifically, was used as the search term).
- There were 37 products launched in Australia (23%) which is an increase on the number launched from November 2013-January 2014. The most innovative products can be found in the following slides.
- Launches predominately occurred in Asia Pacific (75%) which was consistent with previous trends. Key launch countries were Australia (23%) and China (22%).
- Flexible pack format (30%) and jars (12%) were the most used packaging for products over the last three months.
- Snacks (20%) were the main launch category for products containing capsicum. There was also a number of sauces (18%) and meals (18%) launched in the last three months.
- Top claims used were around health (no additives/preservatives, 28%) and convenience (time/speed, 19% and ease of use, 18%).
- The most innovative product launches were Orbis Oil Cut Hot Aroni-Esthe Gel-Japan(examples of these can be found in the following pages).

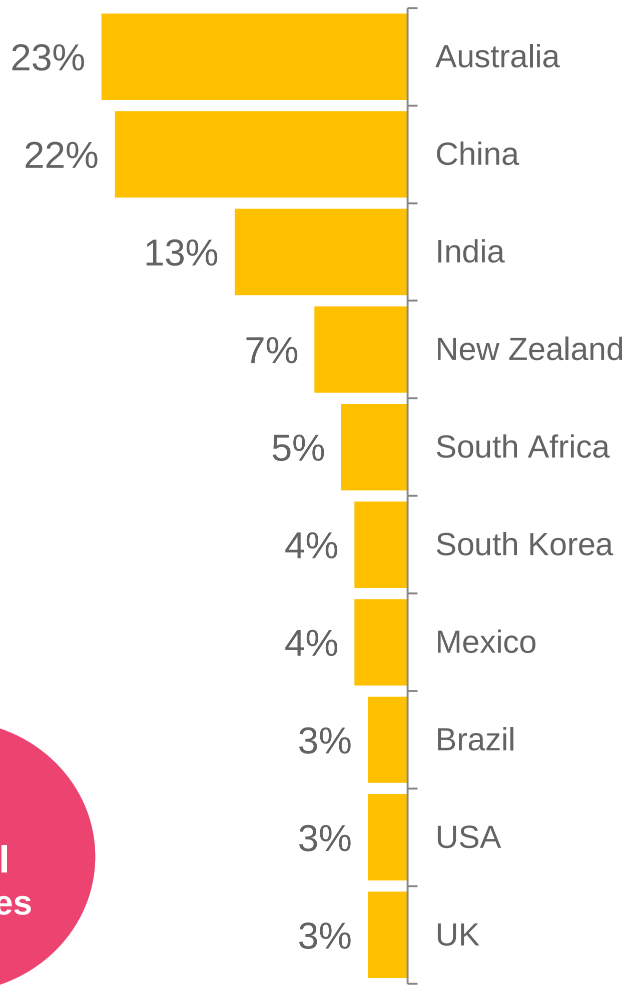
Source: Mintel (2014)

Capsicum SKUs

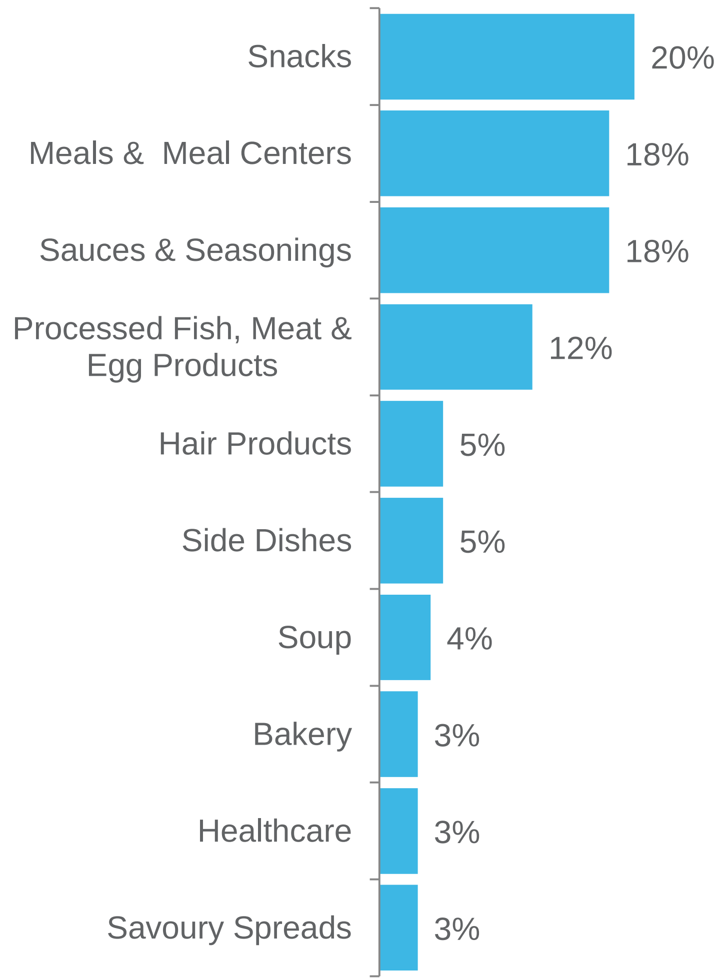
Country, Region & Categories

- The countries with the most launches were Australia, China and India, which was consistent with previous trends.
- There was a variety of products launched over multiple categories. Snacks, meals and sauces were the most common categories for launch.

Top Launch Countries



Top Launch Categories



159 Global Launches

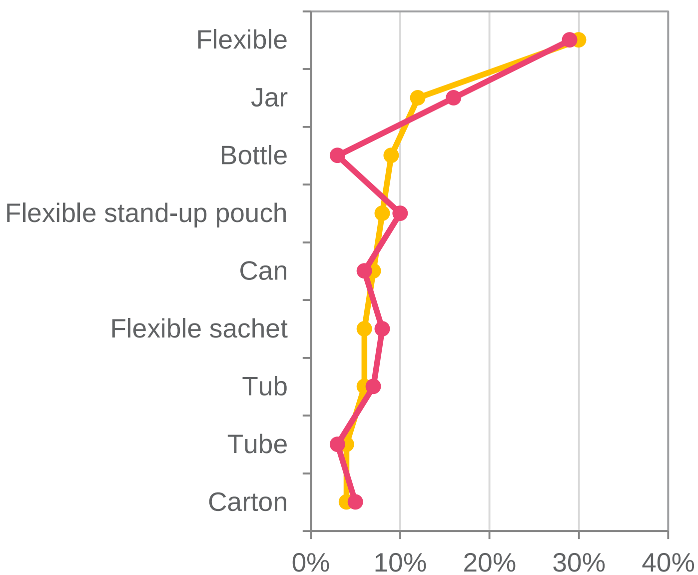
Number of Global Capsicum NPD for the L3M N=159

Capsicum Launches

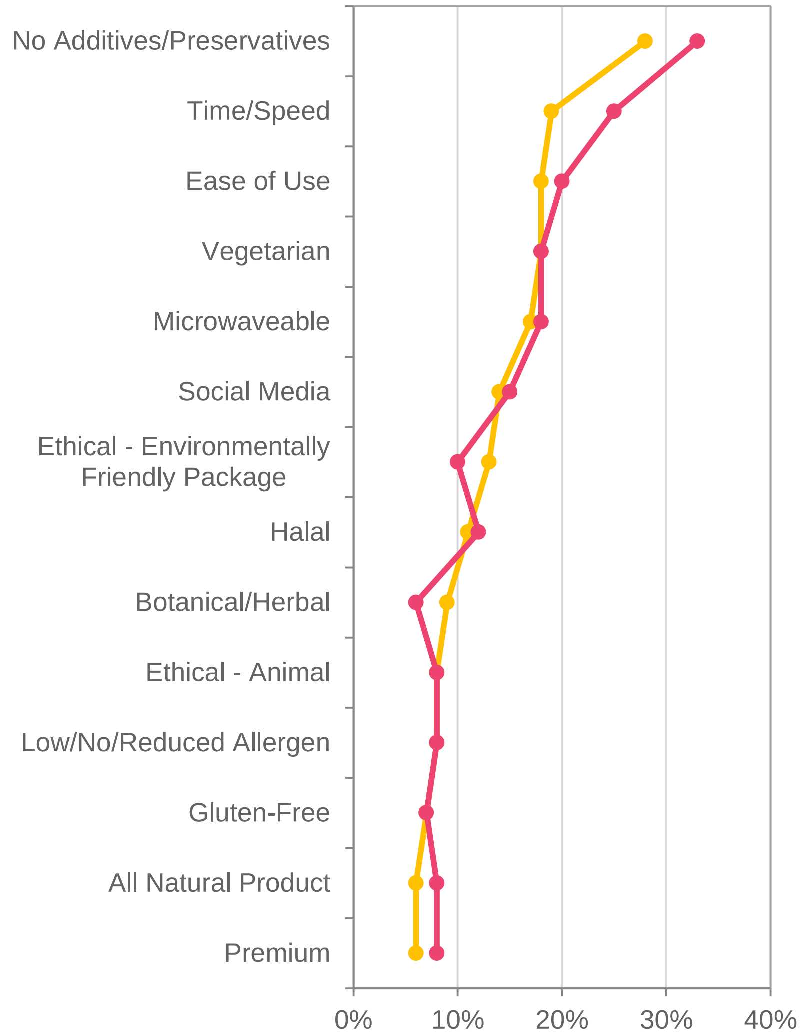
Top Pack Formats Used

- The most common claims used for new product launches were health (no additives and vegetarian) and convenience (time/speed, ease od use and microwaveable).
- Top pack formats launched in the last three months were flexible, jar and bottle.

Top Packs Launched



Top Claims Launched



Global (N=159) Asia Pacific (N=120)

Number of Global Capsicum NPD for the L3M N=159
Only regions with n >30 are displayed

Innovative Capsicum Launches:
L3M (March – May 2014)

Boots Delicious Chilli Fire-Crackers (UK)

Boots Delicious Chilli Fire-Crackers comprise of a chilli flavour rice snack with added sugar. This vegetarian product retails in a 30g pack.

Claims:
Vegetarian

Orbis Oil Cut Hot Aroni-Esthe Gel (Japan)

Orbis Oil Cut Hot Aroni-Esthe Gel is designed to slim the body with a warming sensation and massaging. It contains the firming aronia complex, two moisturising ingredients, and skin-conditioning pepper and ginger extracts.

Claims:
No Additives/Preservatives, Oil Free*, Allergy Tested, Botanical/Herbal, Fragrance Free, Firming*, Moisturising / Hydrating, Slimming*

Kitchens of India Navratan Korma Mixed Vegetable Curry with Cottage Cheese (USA)

Kitchens of India Navratan Korma Mixed Vegetable Curry with Cottage Cheese is new to the range. The product comprises vegetables diced and cooked with cashews and cottage cheese in a special curry created by the Master Chefs of ITC Hotels.

Claims:
No Additives/Preservatives, All Natural Product, Kosher, Microwaveable, Ease of Use, Vegetarian

CJ B!bigo Wellbeing Korean Food Hot & Spicy Bulgogi BBQ Sauce (Vietnam)

CJ B!bigo Wellbeing Korean Food Hot & Spicy Bulgogi BBQ Sauce is said to be ideal for marinating, grilling or stir-frying, and is suitable for meat, poultry, fish or vegetables. The product contains hot pepper, garlic, ginger and natural sweetness of fruit puree and features a great taste of Korea.

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

Source: Mintel (2014)

Innovative Capsicum Launches:
L3M (March – May 2014)

Pams Smooth Guacamole Dip (New Zealand)

Pams Smooth Guacamole Dip is now available. This product is said to be great for dipping and retails in a 300g jar.

Claims:
N/A

Dr. Sheffield's Therma Rub Arthritis & Muscle Pain Relief Cream (USA)

Dr. Sheffield's Therma Rub Arthritis & Muscle Pain Relief Cream is a topical analgesic. The product retails in a 1.5-oz. pack.

Claims:
N/A

Farmpride Chicken Lollies (Singapore)

Farmpride Chicken Lollies are skewered chicken bites that are said to make a perfect treat. They are ideal for family gatherings, corporate or social functions, and ensure fun snacking experience any time and anywhere.

Claims:
Halal, Convenient Packaging, Social Media, On-the-Go

Ve All Asian Style Salad Dressing (China)

Ve All Lao Ban Zhi (Asian Style Salad Dressing) is made with quality ingredients including abalone, honey and orange juice. This halal certified product retails in a 250g pack.

Claims:
Halal

Source: Mintel (2014)

Innovative Capsicum Launches:
L3M (March – May 2014)

Perfetti Van Melle Stop Not Stixz Tomato Tadka Snack (India)

Perfetti Van Melle Stop Not Stix Tomato Tadka Snack is now available in a redesigned limited period offer pack, containing 85g + 17g free, and featuring a Facebook link. The vegetarian product comes with an original recipe, is trans fat free and contains zero cholesterol.

Claims:
Low/No/Reduced Transfat, Vegetarian, Low/No/Reduced Cholesterol, Limited Edition, Social Media

Euro Gourmet Hot Spicy Mayonnaise (Indonesia)

Euro Gourmet Hot Spicy Mayonnaise has been repackaged a newly designed 290ml bottle. It is a combination of mayonnaise and garlic chilli sauce that features sour, spicy and savoury flavours. The product is halal certified.

Claims:
Hala

Tastic Caramelised Onion & Cheddar (South Africa)

Tastic Caramelised Onion & Cheddar is described as a mixture of red peppers and red onions with a caramelised onion and Cheddar flavour. Claimed to be perfect with steak, the certified kosher and halal rice is microwaveable and retails in a recyclable 200g carton.

Claims:
Halal, Ethical - Environmentally Friendly Package, Kosher, Microwaveable

Taste of India Jalfrezi Sauce (New Zealand)

Taste of India Jalfrezi Sauce is an authentic simmer sauce made to a rich, spicy Bengali recipe combining tomatoes, capsicum and spices. This medium strength product contains no gluten, artificial flavours or colours, and retails in a 425g pack including spice seasoning and recipe booklet.

Claims:
No Additives/Preservatives, Social Media, Low/No/Reduced Allergen, Gluten-Free

Source: Mintel (2014)

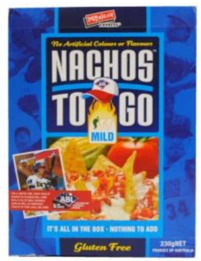
Australian Capsicum Launches:
L3M (March – May 2014)

John West Tuna & Rice Chilli & Tomato Meal

John West Tuna & Rice Chilli & Tomato Meal features a delicious blend of tuna, sauce and vegetables on a bed of fluffy rice. This on-the-go meal is made with all natural ingredients, and is said to be ready in under one minute in a microwave.

Mexican Express Nachos To Go Mild Nacho Meal Kit

Mexican Express Nachos To Go Mild Nacho Meal Kit has been repackaged in a newly designed 230g recyclable pack featuring a Facebook link.



Outback Spirit Outback Tomato Chutney

Outback Spirit Outback Tomato Chutney has been repackaged. It is described as a real Australian chutney with no GMO ingredients, and no artificial colours, flavours or preservatives added.

Chef's Choice Sicilian Style Seafood BBQ Seasoning with Grinder

Chef's Choice Sicilian Style Seafood BBQ Seasoning with Grinder contains no artificial colours, preservatives, fillers or sugar. This spice is said to offer an African taste to BBQ, roast or meat dishes.

Uncle Ben's Express Mediterranean Style Brown Rice

Uncle Ben's Express Mediterranean Style Brown Rice is steamed wholegrain brown rice blended with tomatoes, chargrilled capsicum and zucchini.

Campbells's Chunky Fully Loaded Pub Greats Spanish Style Chorizo & Pasta

Campbells's Chunky Fully Loaded Pub Greats Spanish Style Chorizo & Pasta comprises fusilli pasta with gourmet Spanish style spiced chorizo in a rich creamy tomato sauce. .

Coles Finest Traditional Recipe Chorizo

Coles Finest Traditional Recipe Chorizo has been repackaged. It is described as a Spanish style sausage of coarse ground Australian pork and beef seasoned with paprika. The gluten-free product is made with hormone-free and stall-free pork.

Chicken Tonight Mediterranean Inspired Spanish Chicken Simmer Sauce

Chicken Tonight Mediterranean Inspired Spanish Chicken Simmer Sauce comes with peppers, olive oil and thyme. It is simple to prepare and delicious to eat.

Source: Mintel (2014)

In the Media.

General Vegetable News (March - May 2014)

- The Australian Made and Australian Grown trademarks have launched a new initiative to promote country-of-origin labelling. Research has shown that this branding has a positive impact on purchase behaviour compared with overseas imports.

- A Fresh Produce Safety Centre has been established for all sectors of the fresh produce supply chain. The centre will promote research, outreach and education on fresh produce safety in Australia and New Zealand.

Source: Retail World

Commodity News

(March-May 2014)

- According to the *West Australian,* raids on illegal farm workers in that state have led to a drop in Asian vegetable supplies by 75%.
- The popular *Good Food* section of the Fairfax papers carried an article on 13 May entitled "Bust out More than Bok Choy". Readers are urged to explore a wider range of Asian ingredients and lists a number of lesser-known Asian vegetables with meal suggestions.

- From 24 March Subway Restaurants in Australia have introduced Baby Spinach as a permanent feature to their free salad menu.
- Marketing Director Gina Kahler said, "Spinach perfectly complements our salad range and reinforces that at Subway, people can choose from a wide range of subs, dressings and salad options, and have their lunch or breakfast made the way they say,"

www.ausfoodnews.com.au

- The Goomeri Pumpkin Festival in southern Queenslad has had to import Japanese Pumpkins from outside the region for the first time in the festival's history due to a combination of fewer growers due to last year's floods followed by dry growing conditions in southern Queensland.

ABC Rural 27/5/14

- Popular health website Livestrong has recently updated its information article on the health benefits of bell pepers/capsicums. The site notes that capsicums have high levels of Vitamins A, B-6, C, folate and fibre.

www.livestrong.com

- Using linguistic, ecological and archaeological sources scientists from the University of California believe they can traced the origin of capsicums to central-east Mexico 6500 years ago.

www.sci-news.com

Thanks.