Horticulture Australia and AUSVEG.

VG12078 Project Harvest.

Monthly Tracker Report Wave 16: Asian Vegetables, Beetroot, Capsicums & Sweetpotatoes

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HAL Horticulture Australia

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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 16, September 2014) focuses on:

- Asian Vegetables
- Beetroot
- Capsicums
- Sweetpotatoes

Essentially this is the fourth wave of tracking for these specific commodities, and as such, the current report will bring to light any change over the past 12 months.

This project has been funded by HAL using the vegetable levy and matched funds from the Australian Government.

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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, 617 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, Beetroot, Capsicum & Sweetpotatoes) within the last month

⇛Were the main or joint grocery buyer

	Total N=617	Asian Vegetables n=303	Beetroot n=241	Capsicum n=309	Sweet-potatoes n=311
Gender					
Male	37%	38%	40%	35%	41%
Female	63%	62%	60%	65%	59%
Age					
18-24 y.o.	7%	8%	7%	7%	3%
25-34 y.o.	19%	19%	17%	21%	21%
35-44 y.o.	17%	16%	19%	15%	18%
45-54 y.o.	21%	20%	18%	19%	16%
55-64 y.o.	20%	21%	19%	23%	20%
65+ y.o.	16%	15%	20%	16%	23%
Household					
Single Income no Kids	18%	20%	13%	17%	18%
Double Income no Kids	20%	19%	19%	18%	21%
Young Families	17%	17%	23%	18%	19%
Established Families	24%	23%	22%	23%	18%
Empty Nesters	21%	22%	23%	23%	24%
Location					
New South Wales	26%	25%	23%	24%	17%
Victoria	20%	20%	14%	20%	14%
South Australia	13%	11%	14%	12%	16%
Queensland	19%	18%	19%	17%	19%
Western Australia	14%	14%	20%	15%	16%
Tasmania	3%	4%	6%	8%	11%
Australian Capital Territory	4%	5%	2%	4%	7%
Northern Territory	1%	2%	2%	1%	2%

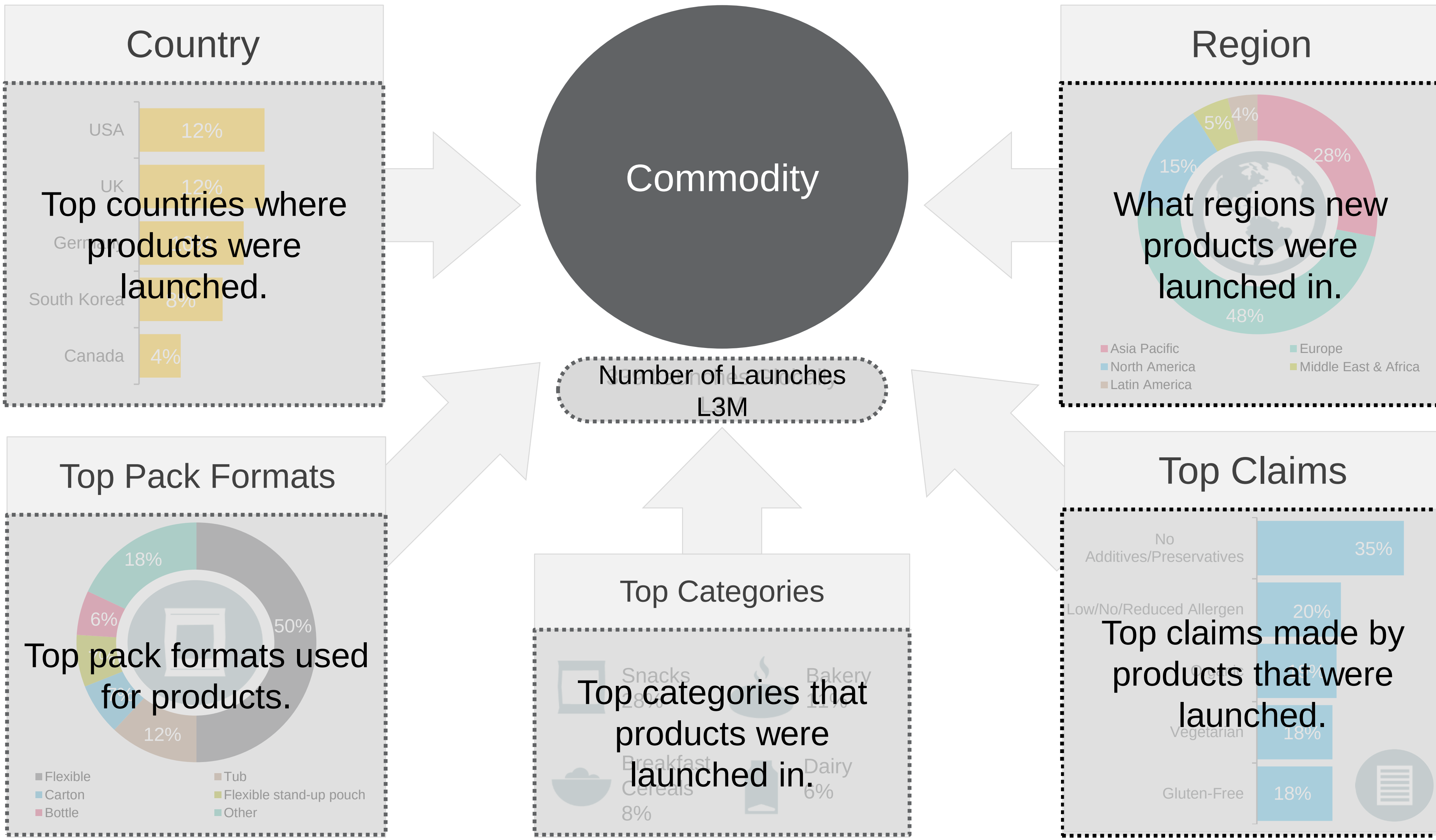
*Please note the lower number of beetroot consumers is due to low incidence of purchase in the last month

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 16:
Executive Summary

Asian Vegetable Grower Action Plan

27% Of consumers indicate they already consume enough Asian Vegetables for their needs.

1.

Insight:

It is important that consumers have a range of Asian Vegetables available where they shop.

Recommendation:

Promote lesser known varieties such as gai lan and kangkong in-store to improve consumers' awareness of multiple varieties of Asian Vegetables, but also encourage trial and increased consumption.

2.

Insight:

Purchase from specialist retailers and markets is common.

Recommendation:

Investigate alternative supply channels and distribution to increase availability for all consumers. Consider supply to rural areas, where purchase and consumption are lower.

3.

Insight:

Consumers routinely cook Chinese cuisine and stir-fry Asian Vegetables.

Recommendation:

Provide consumers 'Quick meal ideas' that include Asian vegetables, such as blanching and cooking Asian vegetables in soup. This should help increase overall consumption and meal occasions.

Beetroot Grower Action Plan

Consumer satisfaction for Beetroot is low.

1.

Insight:

Future purchase intent is high, with a quarter of consumers indicating they will purchase more than they currently do.

Recommendation:

Highlight health benefits of beetroot on packaging and point of sale material (health is a key trigger to purchase, such as reducing risk of heart attacks and high blood pressure). This should help retain future purchase intent.

2.

Insight:

Beetroot is expected to remain fresh for over 10 days.

Recommendation:

Educate consumers on correct storage of beetroot to maintain longevity of freshness, which should improve consumer satisfaction.

3.

Insight:

Globally, beetroot is used to add colour to products and meals. However, this is not a key trigger to purchase for consumers.

Recommendation:

Promote beetroot's versatility as a colourful addition to any meal. This can be achieved through recipe cards and vegetable bundle packs.

Sweetpotato Grower Action Plan

7.5/10

Sweetpotato has strong endorsement compared to the Harvest mean (6.8/10).

1.

Insight:

Consumers see sweetpotato as good value compared to other vegetables (6.5/10).

Recommendation:

Promote that sweetpotato is great value for money in point of sale material.

2.

Insight:

Most often sweetpotato purchased individually, while 1 in 4 purchase bags.

Recommendation:

Explore different bag size formats to move consumers from individual purchases to multiple purchase, and communicate their long shelf life and thus ability to keep for some time.

3.

Insight:

Sweetpotato most commonly consumed in Australian cuisine.

Recommendation:

Promote styles of cooking of sweetpotato that would appeal to cookers of Australian cuisine such as roasts and BBQs.

Capsicum Grower Action Plan

Value for money has improved from previous waves, however is still only moderate (5.9/10).

1.

Insight:

Purchase & consumption frequency is down from previous waves.

Recommendation:

Price increases likely explain why consumption is down. Explore reasons why price per kilo may have increased, and attempt to curtail further price increases.

2.

Insight:

Capsicum considered quite important (7.1/10) compared to the Harvest mean for all vegetables (6.3/10).

Recommendation:

Smooth out fluctuations in supply by exploring ways to extend the season of capsicum.

3.

Insight:

Capsicum is being used less in various cuisines compared to previous waves.

Recommendation:

Remind consumers that capsicum adds colour and variety to a large array of different cuisines.

Fast Facts
(1 of 2)

Asian Vegetables:

- Asian vegetables had positive consumer sentiment, consistent with previous months. Over a quarter of consumers said they would purchase more than they currently do in the future.
- Asian vegetables are purchased 4.5 times per month and are consumed twice per week, consistent with previous waves.
- Consumers purchase 1kg of Asian Vegetables per shop. Recalled last spend was $6.00. Overall, consumers perceive Asian Vegetables to be good value for money, slightly up from last wave.
- National price tracking indicated the average price for Bok Choy in September was $2.14, which was relatively consistent between state and retailers.
- Awareness has remained consistent across waves, with a third of consumers unable to recall a type. Bok Choy was the most recalled type of Asian vegetable, followed by choy sum and Wombok.
- Asian vegetables are expected to stay fresh for 6 days, and freshness expectations are met most of the time. This was consistent with previous months.
- Convenience factors are the key triggers to purchase, with over half of consumers indicating they purchase Asian Vegetables because they are easy to prepare and cook quickly.

Beetroot:

- Beetroot had low levels of importance and consumer satisfaction, however endorsement and future purchase intent were high.
- Beetroot is purchased approximately 2.9 times per month. Consumption of Beetroot occurs 7.2 occasions per month. Beetroot is typically purchased from mainstream retailers.
- On average, consumers purchase 900g of Beetroot. Recalled last spend was $4.70. Overall, consumers perceived value for money is moderate.
- Pricing analysis revealed both loose and bunched Beetroot could be purchased from most mainstream retailers. Average price per kilo in September was $5.21.
- Awareness of beetroot types is low, with two thirds of consumers unable to recall a type. Colour is a key prompt for recall of beetroot.
- Beetroot is expected to remain fresh for over 10 days, relatively long compared with other vegetables tracked. Freshness expectations are generally met by consumers.
- Taste is the key trigger to purchase. Health and adding variety to a meal are also important triggers. The main barriers to future purchase are consuming enough and expense.

Fast Facts
(2 of 2)

Sweetpotato:

- Sweetpotato had strong endorsement amongst consumers over and above the Harvest mean.
- Purchase of Sweetpotato occurred 3.3 times per month and was consumed on average 7.2 times per month.
- Overall, Sweetpotato were perceived to be good value for money (6.5/10). Consumers on average purchase 1.1kg of Sweetpotato, typically individually. Recalled last spend was $3.60.
- Price tracking for September 2014 revealed an average price of $4.94 per kilogram.
- Roughly two thirds of respondents couldn't recall a variety of sweetpotato, those who did more often recalled the colour rather than a specific variety, with Orange / Gold / Yellow being the most recalled colour.
- Taste and health were the strongest triggers to purchase, while already consuming enough for their needs and wanting variety in vegetables were the two biggest barriers.
- Sweetpotatoes were largely consumed in Australian cuisine, and were expected to stay fresh for 13 days, with that expectation mostly being met.

Capsicum:

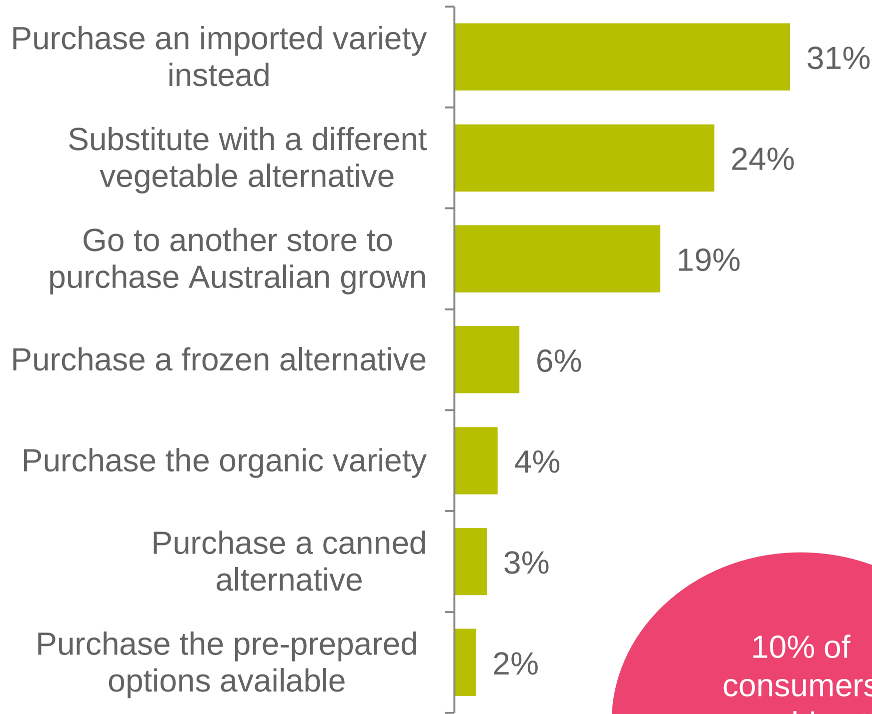
- Consistent with previous waves, capsicums had strong category health figures for importance, satisfaction, endorsement, interest in new and future purchase intent.
- Purchase and consumption frequency of capsicums has fallen in Wave 16 to 3.8 and 9.6 times a month respectively.
- Consumers on average are purchasing 700g each purchase, which is consistent from previous waves, however recalled last spend fell to $3.70 and value for money increased to 5.9/10.
- Price tracking for September 2014 showed the price has increased since May 2014.
- Fewer respondents could not recall any varieties of capsicum from previous waves (42%), however consistent with previous waves, colour (Red, Green, Yellow) was the most recalled.
- Adding colour to a meal was consistently the highest trigger for purchase of capsicums.
- Wave 16 sees a drop in the use of capsicum in most cuisines excluding Indian and Italian.
- The importance of provenance for capsicums fell to 6.0/10, the lowest point since the beginning of tracking.

Wave 16:
Ad-Hoc Questions

If an Australian grown vegetable was not available, nearly a third of consumers would purchase an imported variety instead.

A quarter of consumers would substitute for a different vegetable and one in five would visit another store to purchase Australian grown.

Consumers need to be reminded of all benefits of buying Australian grown including quality, safety, freshness as well as supporting our farmers.



10% of consumers would not purchase a replacement

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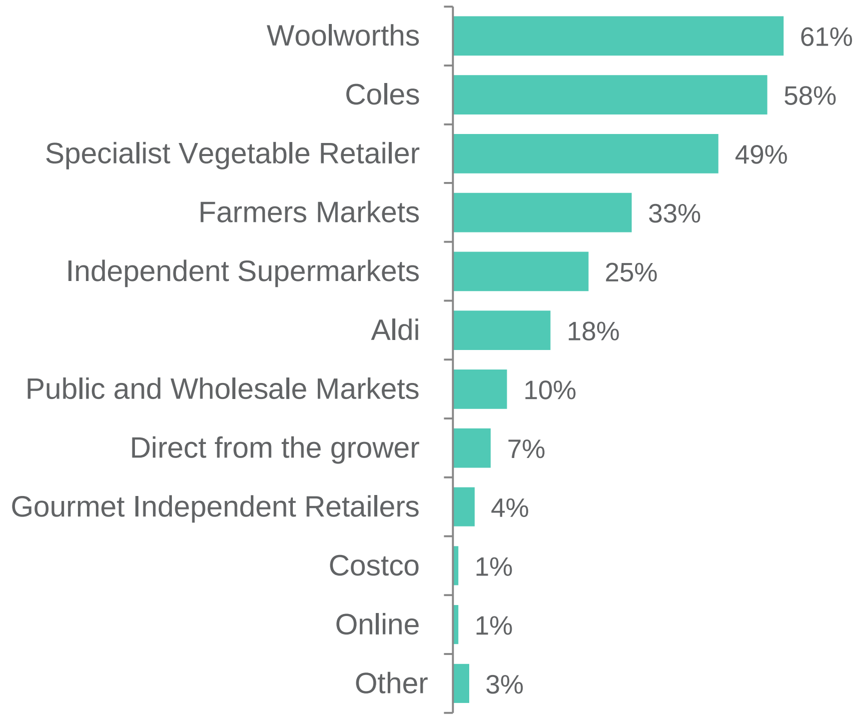
Future purchase of vegetables is most likely going to occur through mainstream retailers, Woolworths and Coles.

Woolworths and Coles are currently the main purchase locations for vegetables tracked, and this looks set to remain consistent for future purchase.

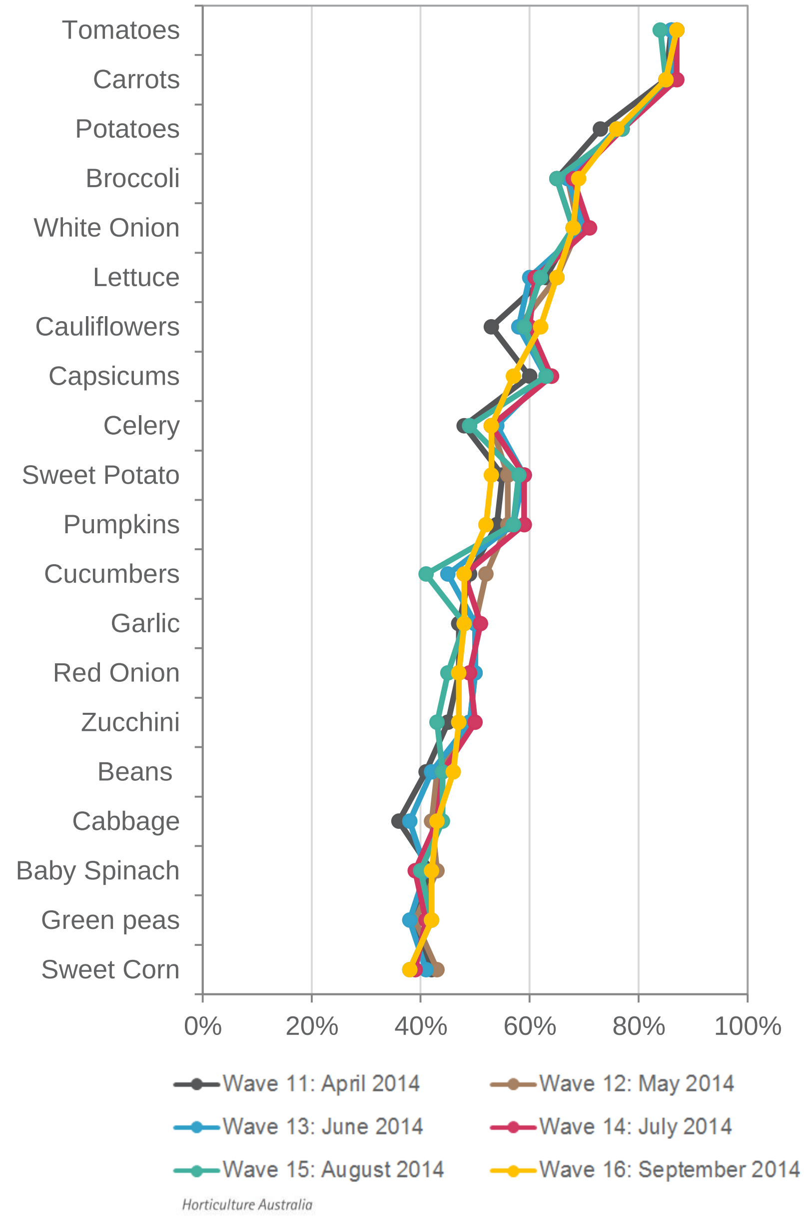
There is a strong intention to purchase from specialist retailers and farmers markets, more than we currently see in the tracker.



Wave 16: Overall Vegetable Tracking

Top 20 Vegetables Purchased

- Vegetable purchase has remained relatively consistent over the last six months.
- The most purchased vegetables in September were tomatoes, carrots, potatoes, broccoli and onion.



Sample Wave 16 N= 1178
S8. Which of the following fresh vegetables have you purchased in the last month?

Category Health Explained

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

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

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

Category Health

- All vegetables tracked this month have strong endorsement from consumers, well above the Harvest mean. These vegetables are more likely to be recommended to family and friends, a highly influential source to try new vegetables.
- Asian Vegetables and Beetroot have strong purchase intent, with over a quarter of consumers indicating they will purchase more in the future. However, consumers are not fully satisfied with both of these vegetables, remaining under the Harvest mean.
- Having a large range of Capsicums when shopping remains important to consumers, and there is also interest in new varieties.

	Asian Vegetables	Beetroot	Sweetpotato	Capsicum	Harvest Total Mean
Importance	7.3	5.5	6.4	7.1	6.3
Satisfaction	6.4	6.2	6.5	7.0	6.6
Endorsement	7.6	7.1	7.5	7.2	6.8
Interest (New Types)	7.3	6.3	6.7	6.5	6.1
Future Purchase					
More	27%	25%	19%	14%	14%
Same	73%	73%	81%	85%	84%
Less	0%	1%	0%	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

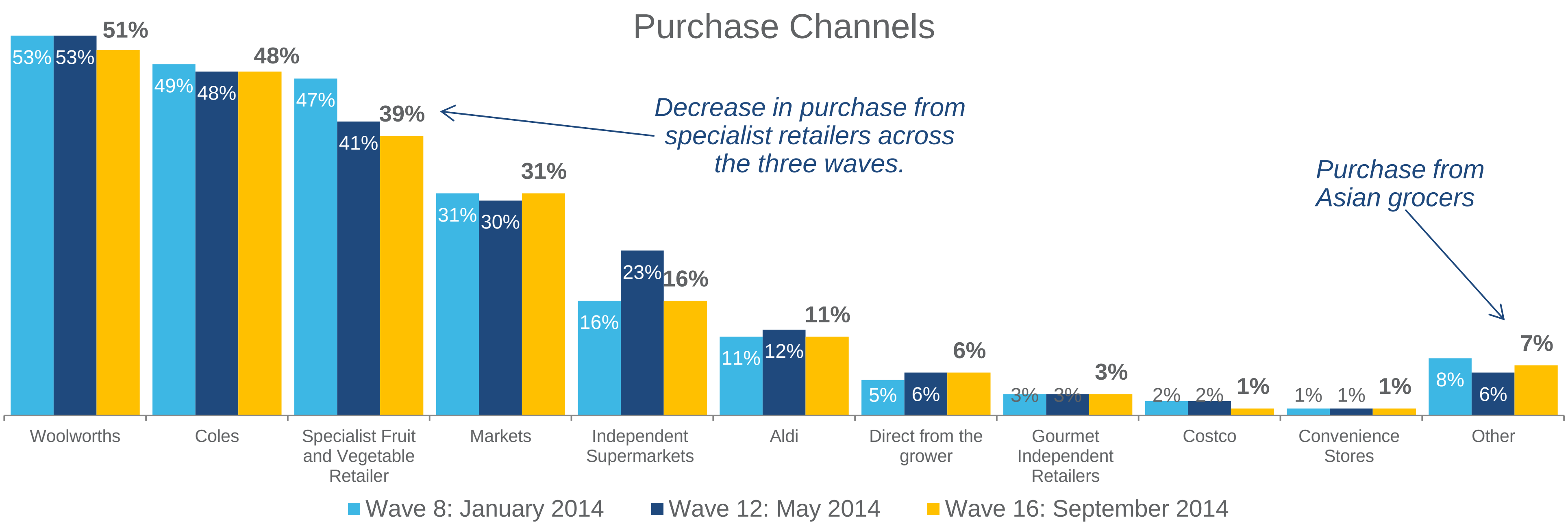
Average Purchase **4.5** times per month

4.8 times, Wave 8
4.6 times, Wave 12

Average Consumption **8.7** times per month

8.8 times, Wave 8
8.0 times, Wave 12

- Purchase frequency is consistent with previous waves, approximately once per week. Asian vegetables are consumed eight times per month.
- Mainstream retailers remain the primary channel of purchase. Purchase from specialist retailers is still strong, however down on previous months.



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 8, N=313, Wave 12, N=305 & Wave 16, N=303

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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 **1.0kg** of Asian Vegetables in September 2014, which is consistent across waves

▼ 0.9kg, Wave 8
▼ 0.9kg, Wave 12

Recalled last spend

The average recalled last spend was **$6.00** in September. This has fallen since May, and is more in line with January spend.

▼ $5.70, Wave 8
▲ $6.50, Wave 12

Value for money

On average, consumers perceived Asian Vegetables to be good value for money **(6.7/10),** in line with previous months.

▼ 6.6/10, Wave 8
▼ 6.5/10, Wave 12

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 8, N=313, Wave 12, N=305 & Wave 16, N=303

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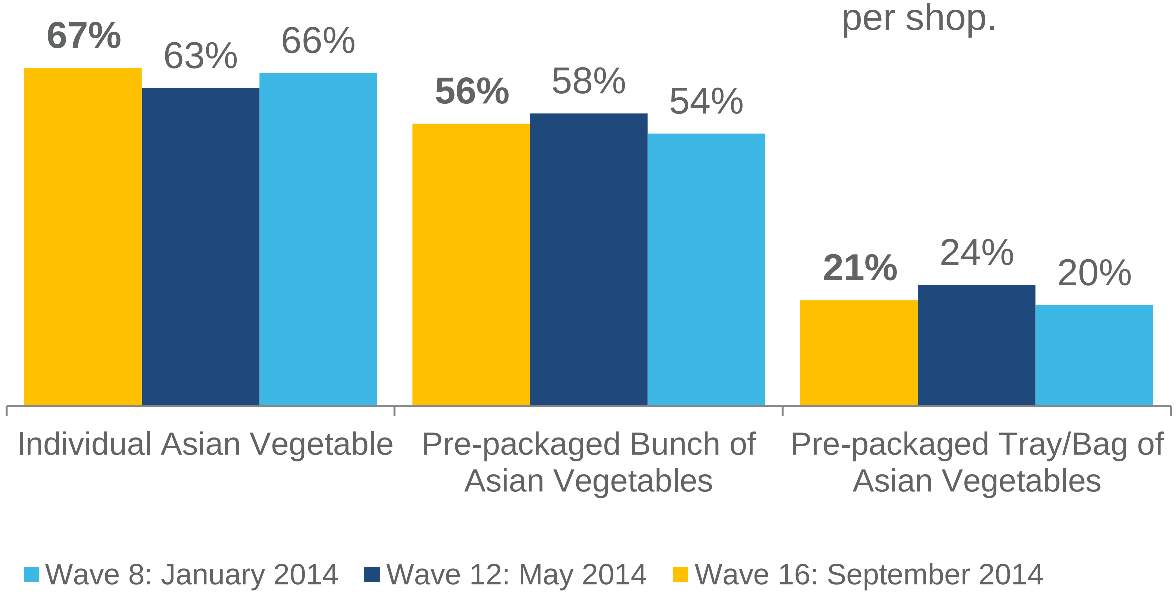
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Pack Formats Purchased

- More than half of consumers purchase individual and bunched formats of Asian vegetables.
- On average two formats are purchased per shop.



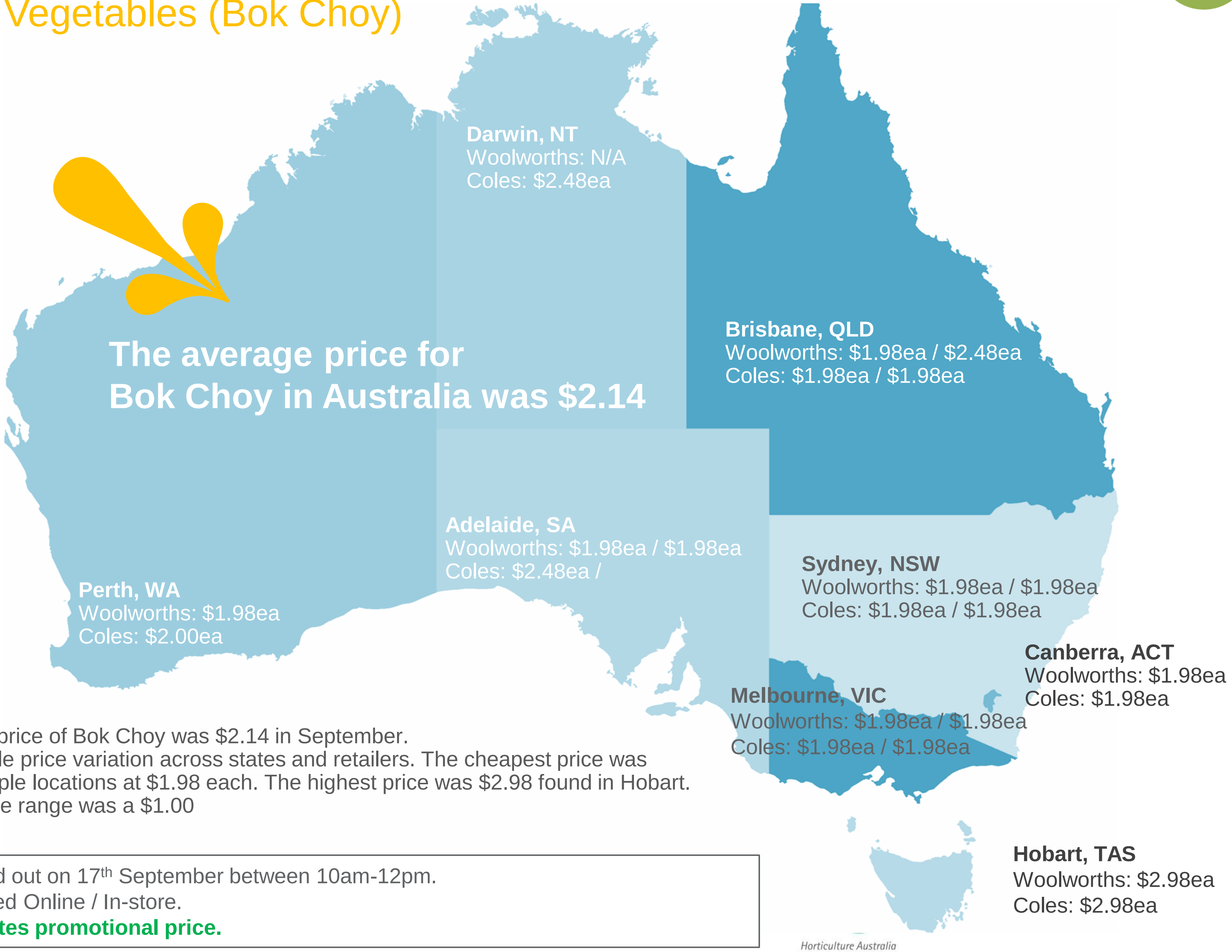
	Individual	Pre-packaged Bunch	Pre-packaged Tray
Wave 16	2.6	2.1	2.0
Wave 12	2.5	1.6	1.4
Wave 8	2.6	1.8	1.7

Increase in the number of bunched and pre-packed formats

Sample Wave 8, N=313, Wave 12, N=305 & Wave 16, N=303
Q3a. How much <commodity> does this typically equate to?

Online and In-store Commodity Prices

Asian Vegetables (Bok Choy)

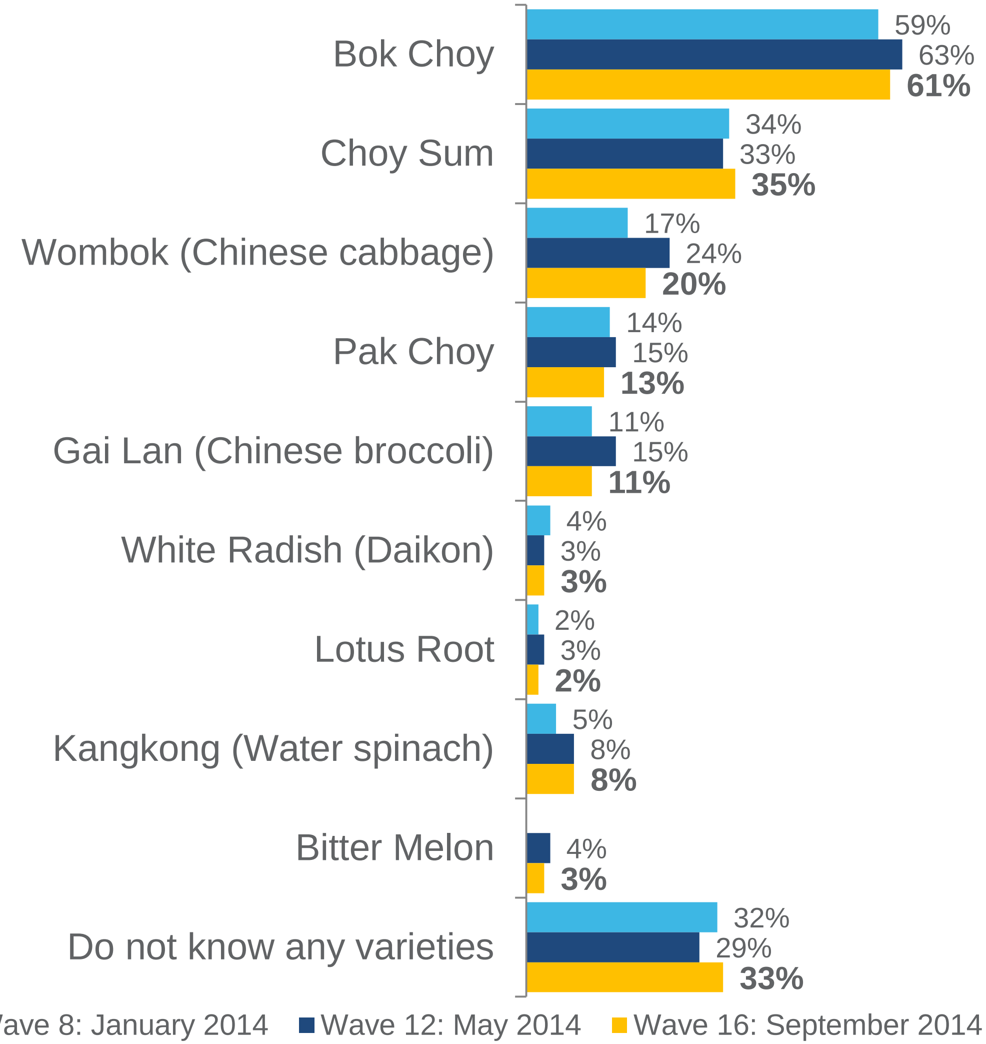


- The average price of Bok Choy was $2.14 in September.
- There was little price variation across states and retailers. The cheapest price was found in multiple locations at $1.98 each. The highest price was $2.98 found in Hobart.
- The retail price range was a $1.00

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

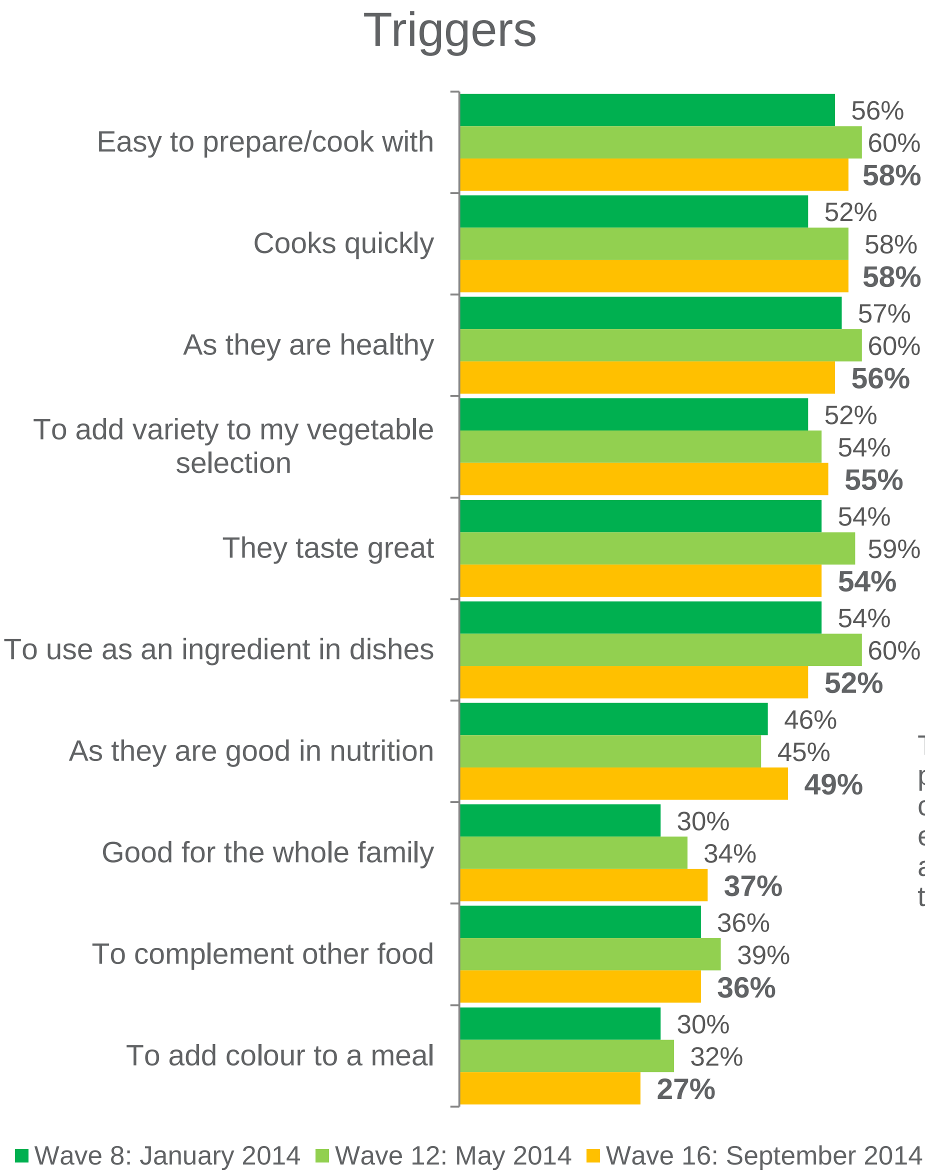
Spontaneous Awareness

- Awareness of Asian vegetables has remained relatively consistent across waves, with a third of consumers unable to recall a type.
- Bok choy has the greatest level of awareness, followed by Choy Sum and Chinese cabbage.



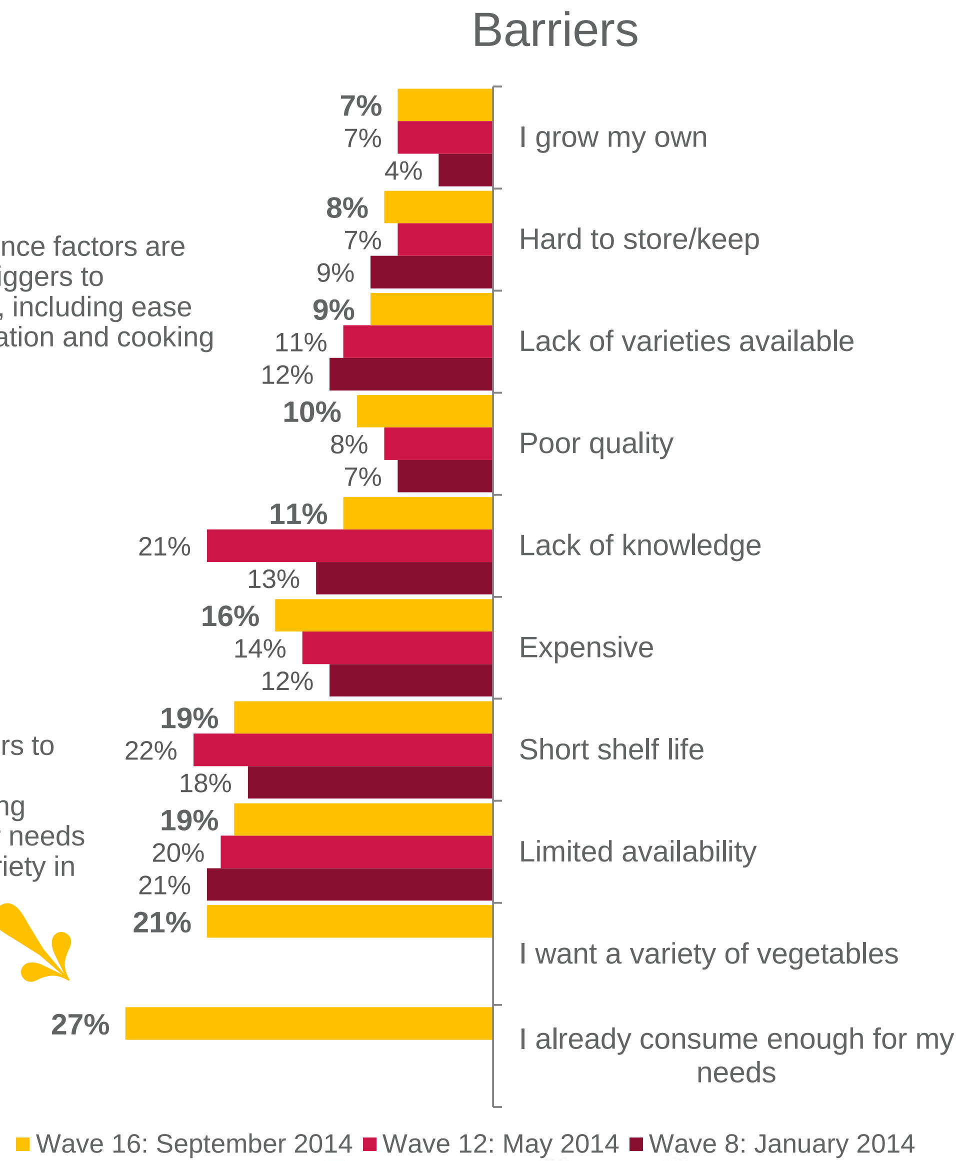
Sample Wave 8, N=313, Wave 12, N=305 & Wave 16, N=303
Q6a. What varieties/types of <commodity> are you aware of? (unprompted)

Triggers and Barriers to Purchase



Convenience factors are the key triggers to purchase, including ease of preparation and cooking quickly.

The main barriers to purchase are consumers eating enough for their needs and wanting variety in their diets.



Sample Wave 8, N=313, Wave 12, N=305 & Wave 16, N=303
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?

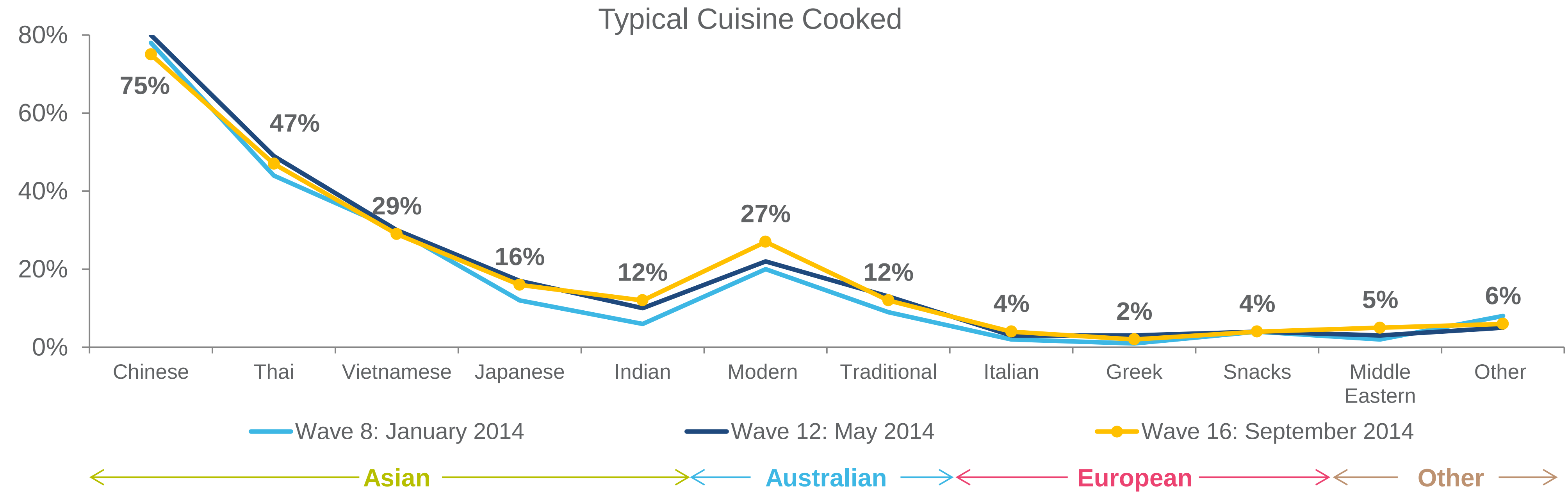
Cooking Cuisine & Occasions

⇛ Cooking with Asian vegetables has remained relatively stable across all waves, with Chinese and Thai style most popular.

⇛ Weekday dinners was the main consumption occasion this month, up from May and January.

Wave 16 Top Consumption Occasions

	Wave 16	Wave 12	Wave 8
Weekday dinner	**57%**	▲	▲
Every day	**38%**	▼	–
Quick meals	**38%**	▲	▼
Weekend dinner	**37%**	▲	▼
Family meals	**31%**	▲	▲

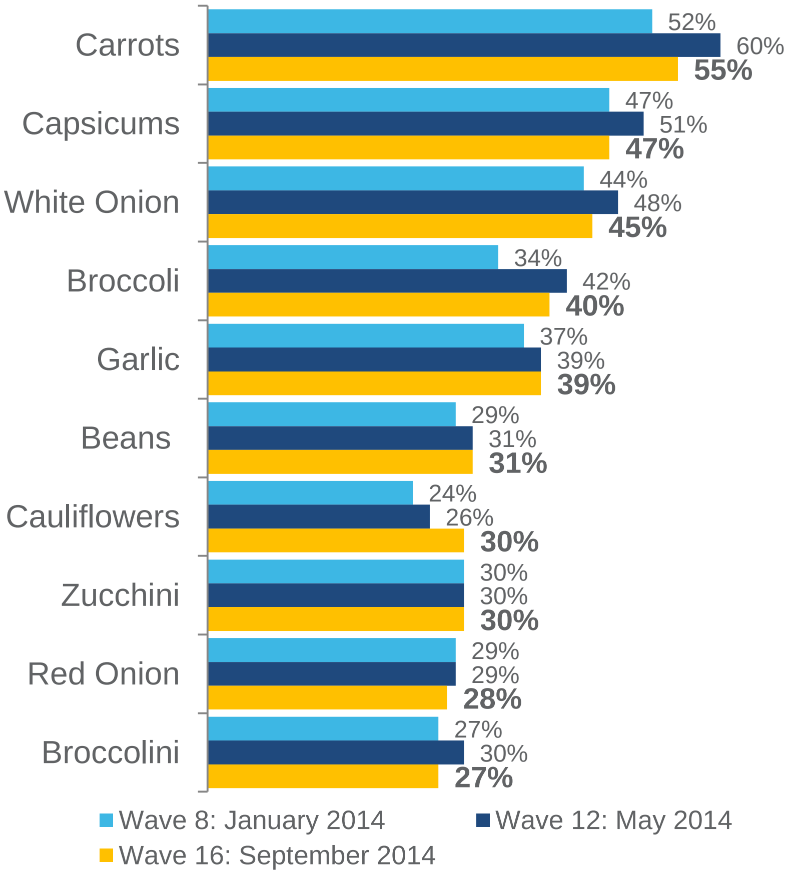


Sample Wave 8, N=313, Wave 12, N=305 & Wave 16, N=303
Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?

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

Cooking Preferences

Accompanying Vegetables



- Asian vegetables are generally served with carrots, capsicums and onion
- The majority of consumers opt to stir-fry, which has been the primary cooking style for all waves.

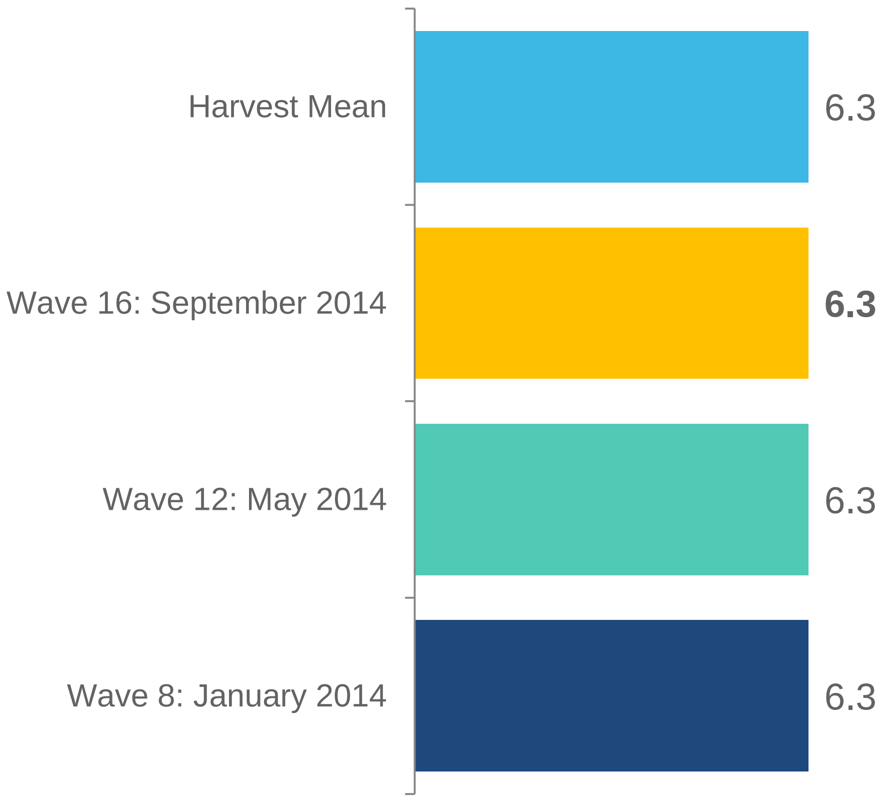
Top 10 Cooking Styles

	Wave 8	Wave 12	Wave 16
Stir frying	83%	84%	79%
Steaming	42%	47%	41%
Sautéing	17%	20%	24%
Soup	20%	20%	23%
Boiling	12%	15%	19%
Blanche	10%	16%	13%
Raw	10%	10%	12%
Microwave	8%	12%	11%
Shallow Frying	12%	12%	9%
Stewing	7%	8%	6%

Sample Wave 8, N=313, Wave 12, N=305 & Wave 16, N=303
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 provenance remains stable across all waves, being relatively important to consumers. This is in line with the Harvest mean for all vegetables tracked thus far.



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 8, N=313, Wave 12, N=305 & Wave 16, N=303

Freshness and Longevity

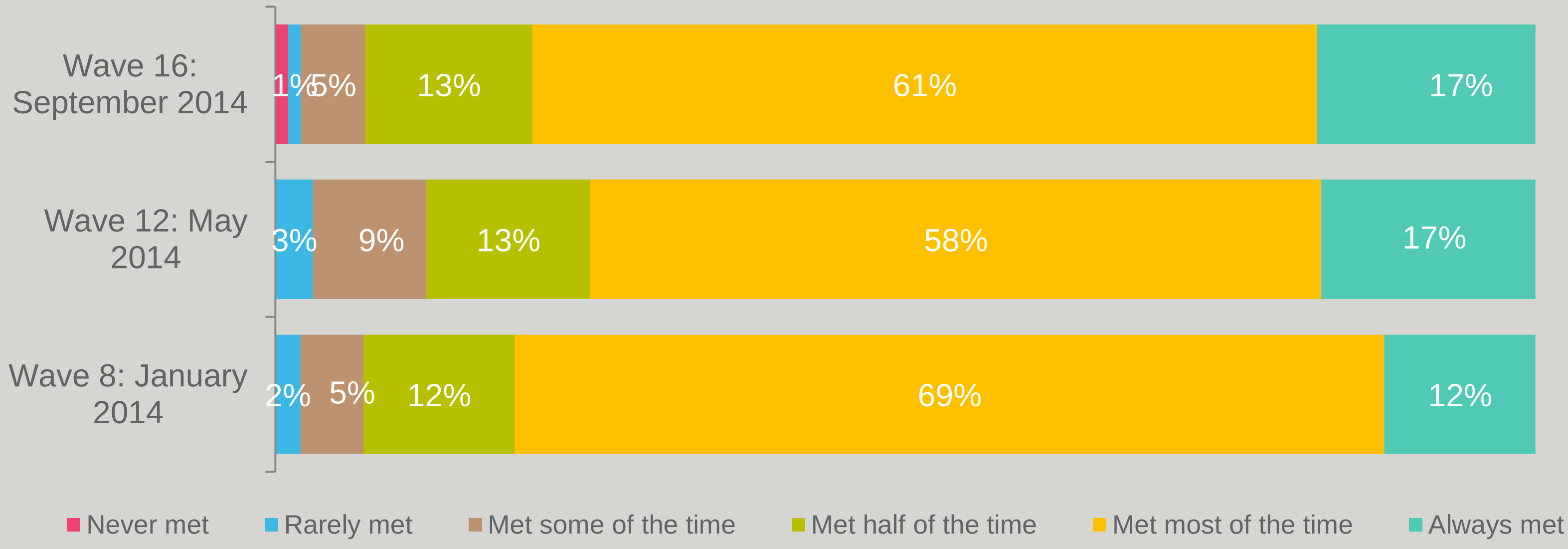
Expected to stay fresh for **5.9** days

▼ 5.5 days, Wave 8
▬ 5.9 days, Wave 12

⇛ Asian vegetables are expected to remain fresh for six days once purchased. This is consistent with findings from May.

⇛ Freshness is generally met, with over half of consumers indicating this was met most of the time.

Expectations Met



Sample Wave 8, N=313, Wave 12, N=305 & Wave 16, N=303
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> ?

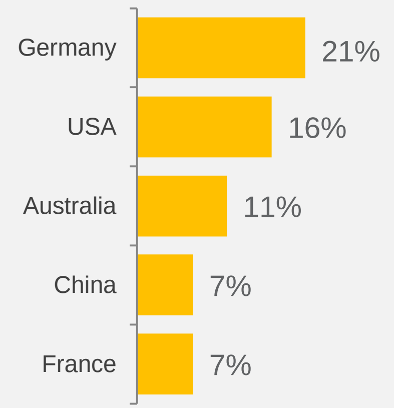
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Trends: Asian Vegetables

Asian Vegetables Global NPDs
July – September 2014

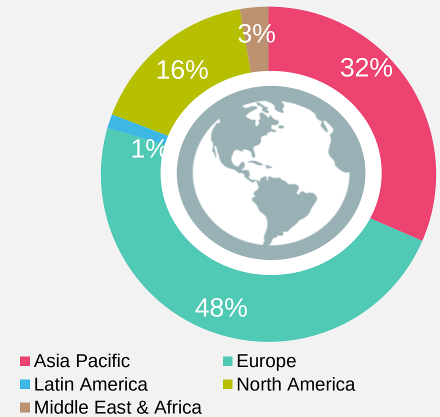
There were 73 launches in the last three months that contained Asian Vegetables as an ingredient. Products are primarily launched in Europe and Asia Pacific regions. The main categories for launches are meals, sauces and seasonings and fruit and vegetables.

Country

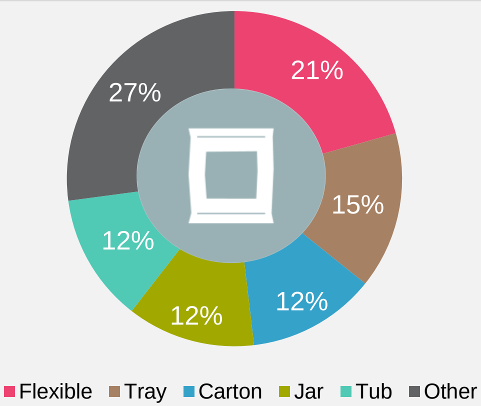


73 Global Launches

Region



Top Pack Formats



Categories

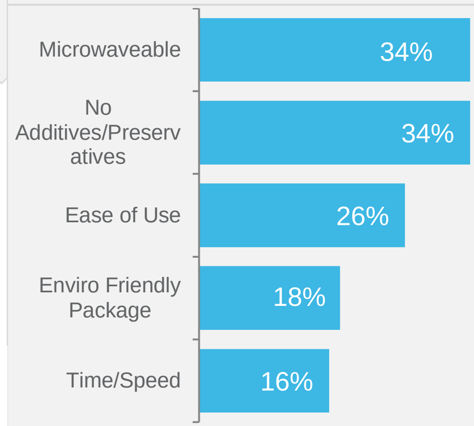
Meals 34%

Sauces 27%

Fruit & Vegetables 14%

Processed Products 7%

Top Claims



Asian Vegetables Product Launches:
Last 3 Months (July – September 2014)
Summary

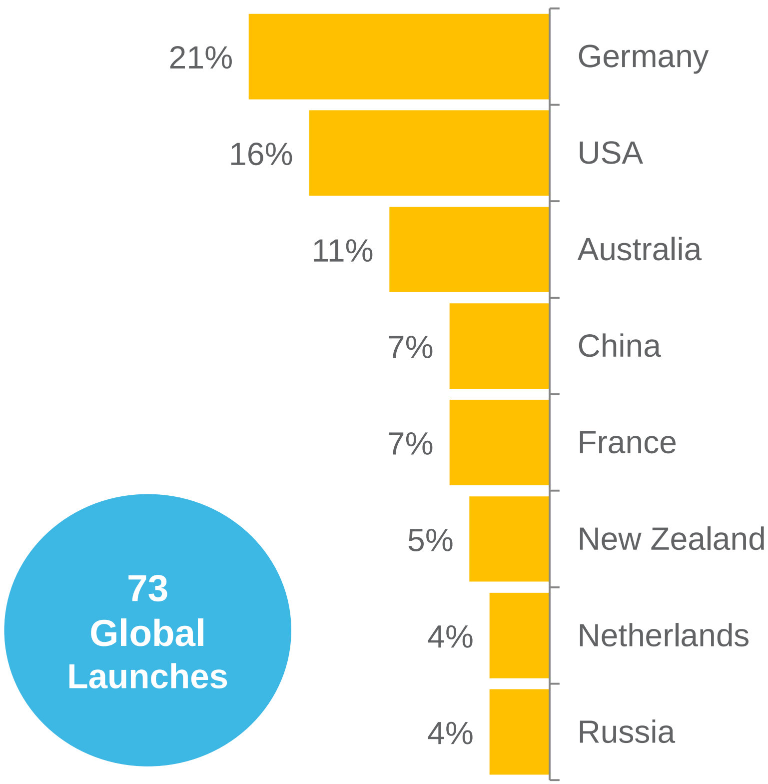
- There were 73 products launched over the last three months that contained Asian Vegetables as an ingredient.
- In Australia there were eight products launched in Australia, most of which were ready to eat Asian meals.
- Europe (48%) and Asia Pacific (32%) were the main regions for launches, consistent with previous trends.
- Flexible formats remained the most common type of packaging (21%).
- The top category launches were meals (34%), sauces and seasonings (27%) and fruit and vegetables (14%).
- Popular claims used were around convenience, including microwavable (34%), ease of use (26%) and time/speed (16%).
- The most innovative Asian Vegetable product was the noodles with baby Asian vegetables, launched in France (example can be found in the following pages).

Source: Mintel (2014)

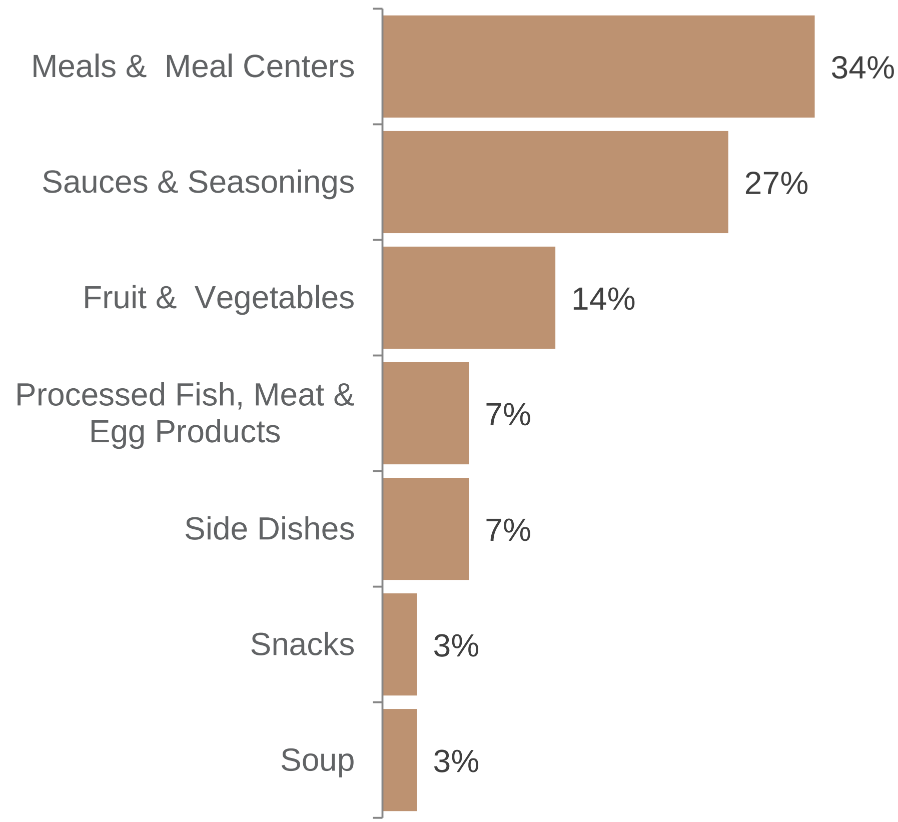
Country & Category Launches

- Germany is the main country for products containing Asian Vegetables. USA and Australia also have multiple launches.
- Products launched over the last three months are primarily meals and sauces and seasonings.

Top Launch Countries

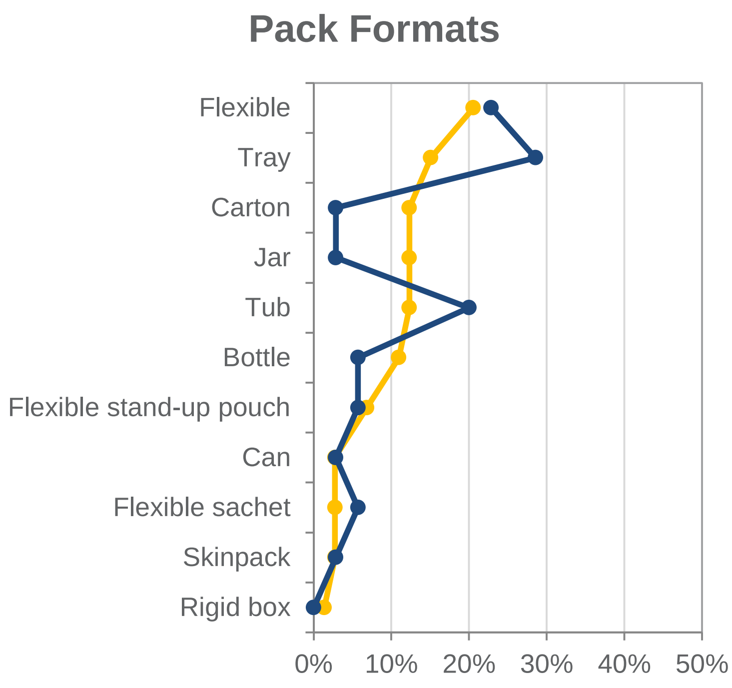


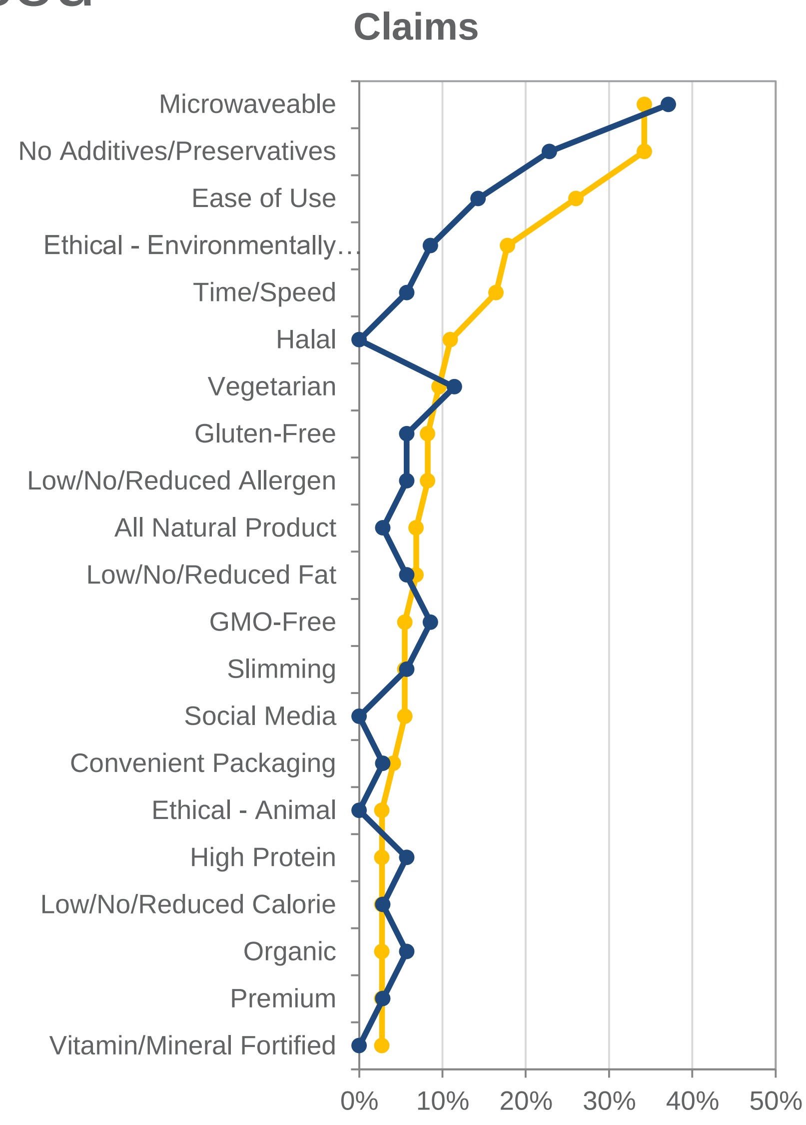
Top Launch Categories



Top Claims & Pack Formats Used

- Flexible packaging remains the most common format used. Trays are used more often in Europe than other regions.
- Convenience claims were popular with products launched, including microwavable, ease of use and time/speed.





Global N=73 Europe N=35

Only regions with n >30 are displayed

Innovative Asian Vegetables Launches:
L3M (July – September 2014)

Suzi Wan Noodles & Baby Asian Vegetables (France)

Suzi Wan Nouilles Petits Légumes d'Asie (Noodles & Baby Asian Vegetables) are pre-cooked and only require boiling water. This product is free from artificial colourings, flavourings and preservatives, and retails in a 65g pack that serves one.

Claims:
Ease of Use, No Additives/Preservatives, Time/Speed

Maggi Fond Cups Thai Bouillon (Norway)

Maggi Fond Cups Thai Bouillon is described as a tasteful addition to any Asian dishes. This product is free from artificial flavours, and retails in a 144g pack containing six units and featuring a recipe idea.

Claims:
No Additives/Preservatives

Asian Home Gourmet Thai Tom Kha Instant Noodle Soup (New Zealand)

Asian Home Gourmet Thai Tom Kha Instant Noodle Soup has a mild spice level and is free from MSG, artificial colours and flavours. This quick-to-cook product can be heated in the microwave in just 90 seconds. It retails in a 140g recyclable pack that serves one person and includes real paste, noodles and a spork inside.

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

Marks & Spencer Modern Asian Chicken Penang (UK)

Marks & Spencer Modern Asian Chicken Penang is now available. This mild product consists of chargrilled marinated chicken in a fragrance coconut and lime sauce topped with roasted spice vegetables and fresh coriander. It is microwaveable, and retails in a 250g pack.

Claims:
Vegetarian, Microwaveable

Source: Mintel (2014)

Innovative Asian Vegetables Launches:

L3M (July – September 2014)

Eden Würzl Wok Stock Cubes (Germany)

Eden Würzl Wok-Würfel (Wok Stock Cubes) has been relaunched previously branded as Bruno Fischer products. The organic and vegan seasoning product is suitable for Asian style vegetables made in a wok and the cubes are yeast and gluten free. It retails in a 66g pack displaying the Neuform Quality and EU Green Leaf logos, each pack containing 6 x 11g cubes.

Claims:
Low/No/Reduced Allergen, Gluten-Free, Vegan, Organic, No Animal Ingredients, Vegetarian

Picard C'est Prêt! Beef Meatballs, Asian Noodles & Wok Vegetables (France)

Picard C'est Prêt! Boulettes de Boeuf Nouilles Asiatiques Légumes Wok (Beef Meatballs, Asian Noodles & Wok Vegetables) is made with French origin beef and can be heated in the microwave in six minutes. This product retails in a partly recyclable 360g pack that serves one and includes a convenient plastic fork.

Claims:
Ease of Use, Convenient Packaging, Ethical - Environmentally Friendly Package, Microwaveable

Dole Chopped All Natural Sesame Asian Salad Kit (USA)

Dole Chopped All Natural Sesame Asian Salad Kit comprises sliced almonds, garlic wontons, cabbage, romaine, kale, carrots, green onions and Dole toasted sesame and ginger vinaigrette. The thoroughly washed salad kit is an excellent source of vitamins A, C and K. It is free from trans fat, artificial ingredients, coloring, flavoring and preservatives.

Claims:
No Additives/Preservatives, All Natural Product, Low/No/Reduced Allergen, Social Media, Ease of Use, Gluten-Free, Low/No/Reduced Transfat

Asian Taste Tikka Masala Chicken with Basmati Rice (Spain)

Asian Taste Pollo Tikka con Masala con Arroz Basmati (Tikka Masala Chicken with Basmati Rice) comprises roast chicken with tomato, onion sauce and basmati rice. The product is free from additives, flavour enhancers, preservatives and artificial colours, and can be prepared in three to four minutes in the microwave. It retails in a 350g pack.

Claims:
No Additives/Preservatives, Microwaveable

Source: Mintel (2014)

Innovative Asian Vegetables Launches:

L3M (July – September 2014)

Waitrose Asian Fusion Vegetable Curry Puffs (UK)

Waitrose Asian Fusion Vegetable Curry Puffs contains a crisp, golden pastry filled with a spicy mix of carrot, white radish, bean sprouts, lemon grass, galangal and coconut. This medium spicy product is suitable for vegetarians, and retails in a 150g partly recyclable pack containing six pieces.

Claims:
Vegetarian, Ethical - Environmentally Friendly Package

Weight Watchers Zum Auslöffeln Asian Vegetable Soup with Chicken (Austria)

Weight Watchers Zum Auslöffeln Asiatische Gemüsesuppe mit Hühnerfleisch (Asian Vegetable Soup with Chicken) is now available. This microwaveable product is free from flavour enhancers and colourants, has a value of three ProPoint and retails in a 395ml recyclable can.

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

AH Grofgesneden Asian Stir-Fry Vegetables with Curry (Netherlands)

AH Grofgesneden Aziatische Wokgroente met Curry Madrassaus (Asian Stir-Fry Vegetables with Curry Madras Sauce) are now available. These stir-fry vegetables contain no gluten and retail in a 465g pack with one 125g sachet of curry madras sauce.

Claims:
Gluten-Free, Low/No/Reduced Allergen

Chef Select Asia Mah Mee Asian Noodle Speciality with Chicken (Germany)

Chef Select Asia Asiatische Nudel-Spezialität mit Hühnerfleisch (Mah Mee Asian Noodle Speciality with Chicken) is a microwavable meal with noodles, chicken and vegetables in a soy sauce base marinade. This pasteurized product retails in a 350g tray.

Claims:
Microwaveable

Source: Mintel (2014)

Australian Innovative Launches:
L3M (July – September 2014)

Coles Asian Crunchy Stir-Fry

Coles Asian Crunchy Stir-Fry is Australian grown. The product retails in a 350g pack featuring the Buy West Eat Best logo.

Claims:
N/A

Classic Asian Laksa Paste

Classic Asian Laksa Paste is 100% natural and contains no MSG, additives, preservatives or artificial colouring. The gluten free and halal certified product retails in a 230g jar.

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

Sun Rice Hokkien Noodles Thai Basil & Chilli Chicken and Vegetables

Sun Rice Hokkien Noodles Thai Basil & Chilli Chicken with Vegetables & Noodles has been relaunched under a new brand name, features more chicken and sauce than the previous recipe, and also an updated pack design.

Claims:
No Additives/Preservatives, Ease of Use, Ethical - Environmentally Friendly Package, Time/Speed, Microwaveable, Halal

Source: Mintel (2014)

This is the first wave of beetroot tracking

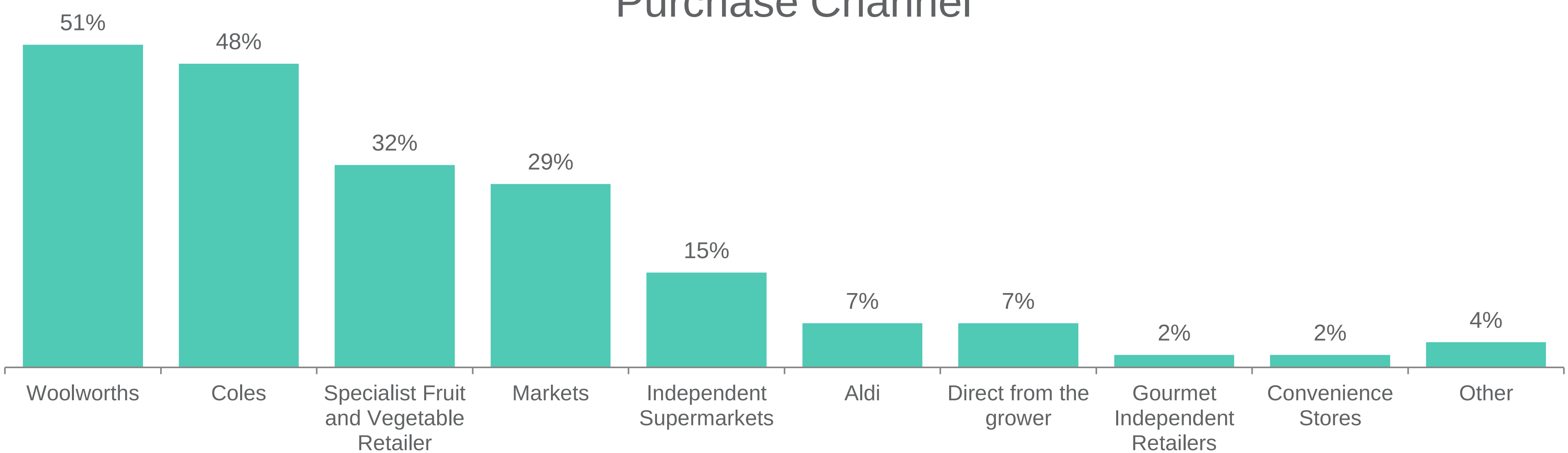
Purchase and Consumption Behaviour

Average Purchase **2.9** times per month

Average Consumption **7.2** times per month

- Consumers purchase beetroot three times per month, with relatively frequent consumption occasions.
- Beetroot is typically purchased through mainstream retailers, Woolworths and Coles. There was regular purchase at specialist retailers and markets this month.

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 N=241

Average Spend and Price Sensitivity

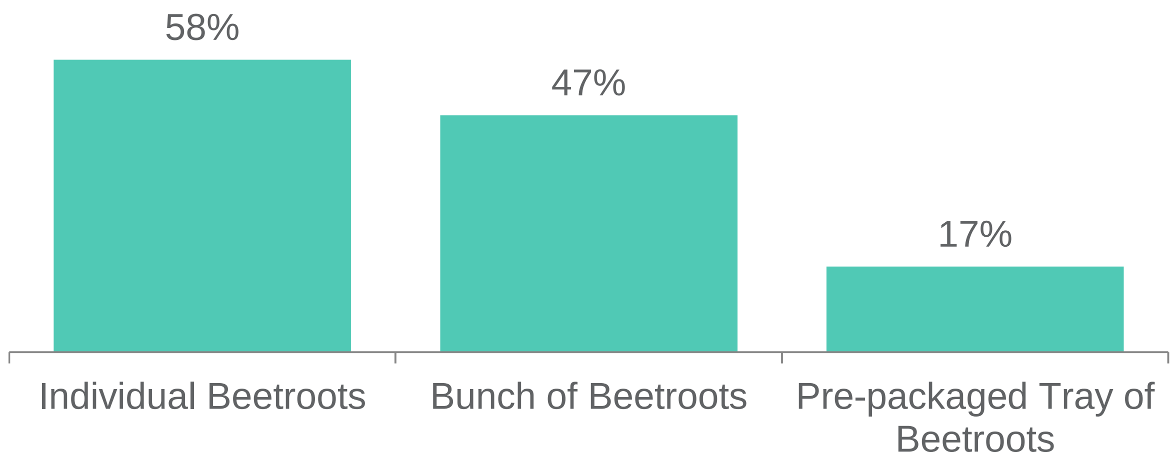
Average weight of purchase	Recalled last spend	Value for money
The average consumer typically purchases **0.9kg** of Beetroots.	The average recalled last spend is **$4.70** in September 2014.	On average, consumers perceive Beetroot to be moderate value for money **(6.2/10).**

Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typical purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample N=241

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

Pack Formats Purchased

- Consumers prefer to purchase beetroots loose or in a bunch. Pre-packaged options are less popular.
- On average, three beetroots are purchased per shop.

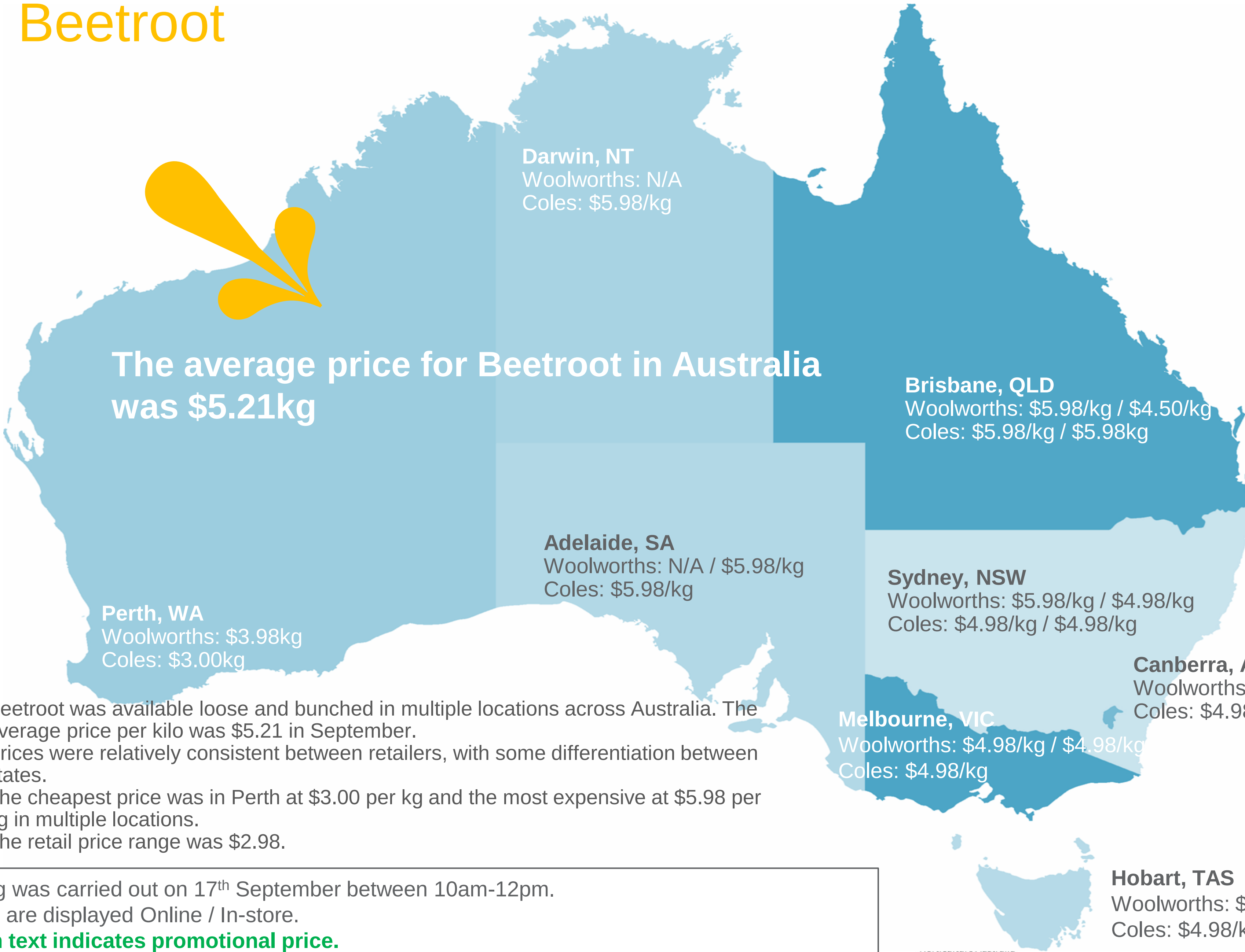


	Individual	Bunch	Pre-packaged
Wave 16	3.6	1.7	1.4

Sample N=241
Q3a. How much <commodity> does this typically equate to?

Online and In-store Commodity Prices

Beetroot

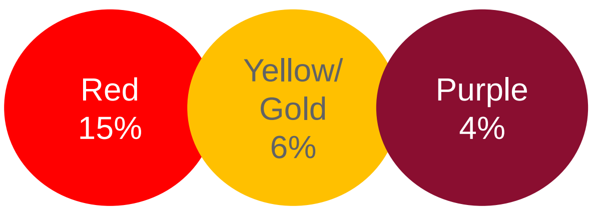


- Beetroot was available loose and bunched in multiple locations across Australia. The average price per kilo was $5.21 in September.
- Prices were relatively consistent between retailers, with some differentiation between states.
- The cheapest price was in Perth at $3.00 per kg and the most expensive at $5.98 per kg in multiple locations.
- The retail price range was $2.98.

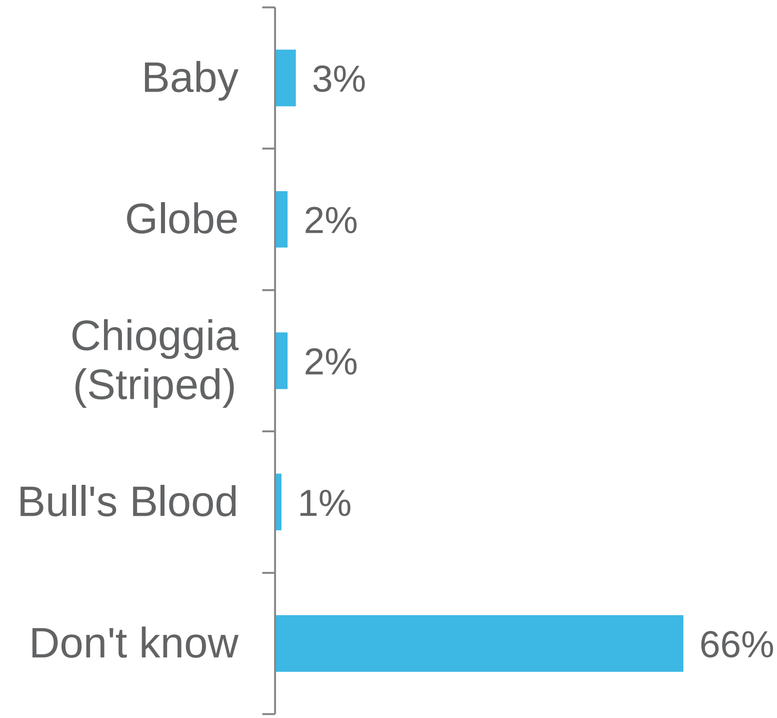
Pricing was carried out on 17th September between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates promotional price.

Spontaneous Awareness

- Awareness of beetroots is low, with two thirds of consumers unable to recall a type.
- A small number of consumers recalled baby, globe and Chioggia types.
- Colour is a prompt to awareness, with consumers recalling red, yellow and purple as types of beetroot.



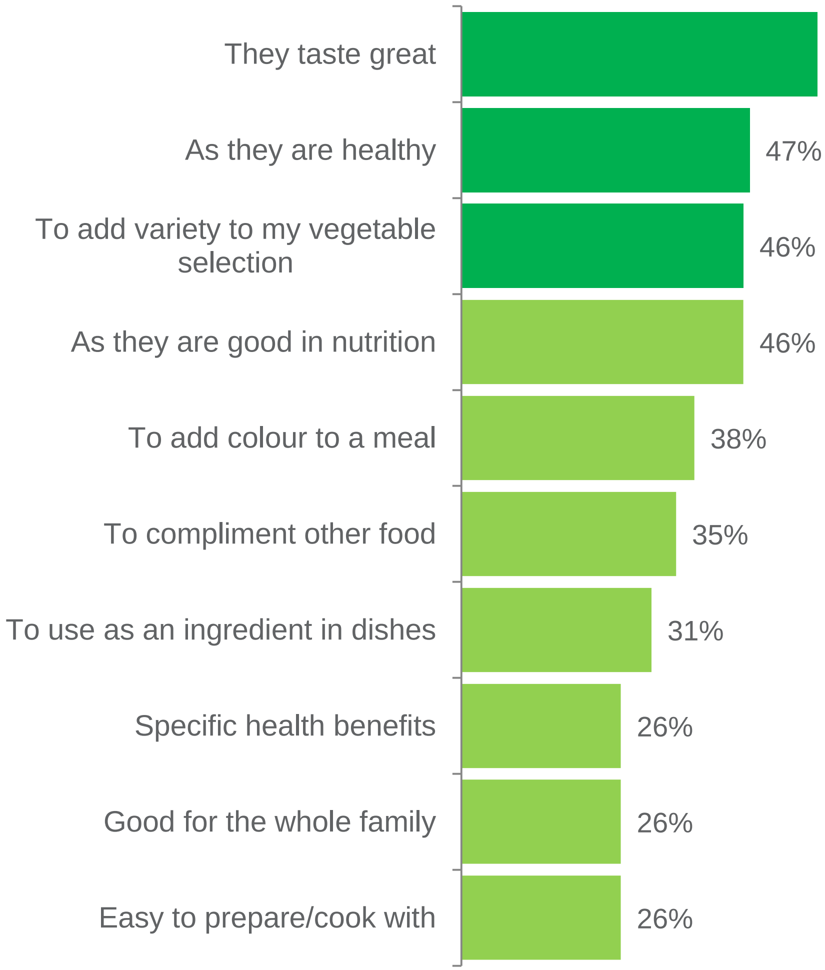
"Red beetroot. I know them by sight not by name."



Sample N=241
Q6a. What varieties/types of <commodity> are you aware of? (unprompted)

Triggers and Barriers to Purchase

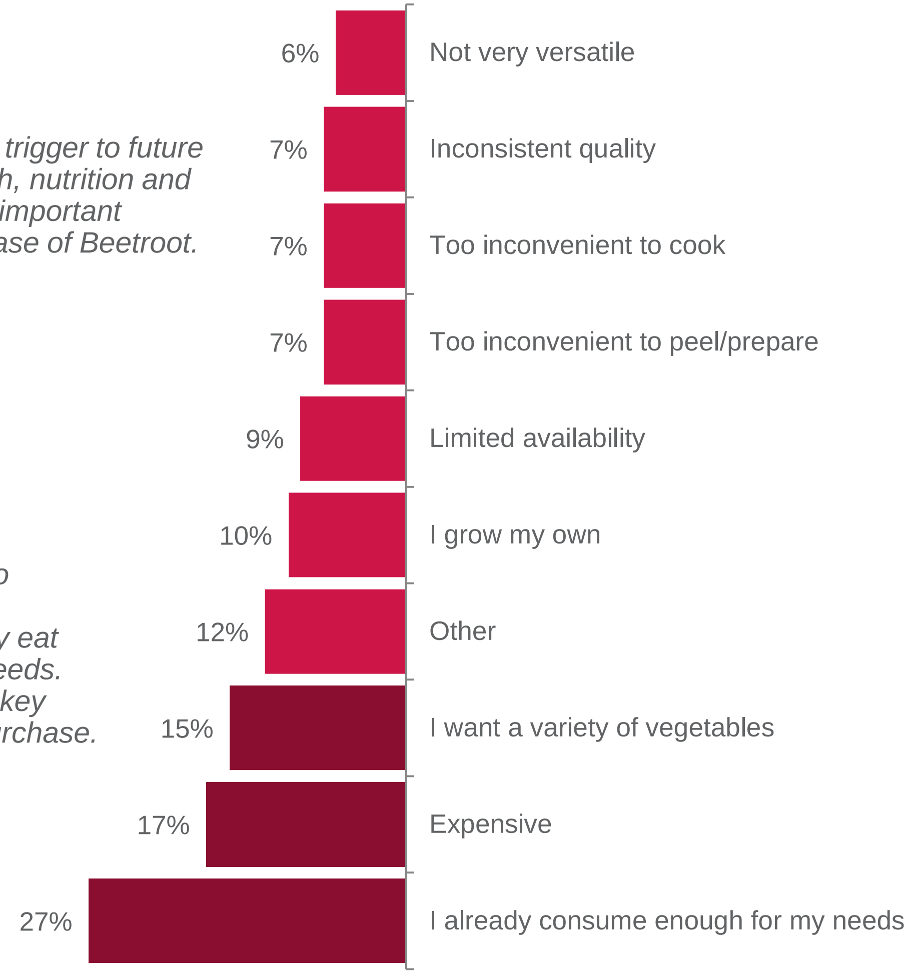
Triggers



Taste is the key trigger to future purchase. Health, nutrition and variety are also important factors in purchase of Beetroot.

The main barrier to purchase is that consumers already eat enough for their needs. Expense is also a key barrier to future purchase.

Barriers



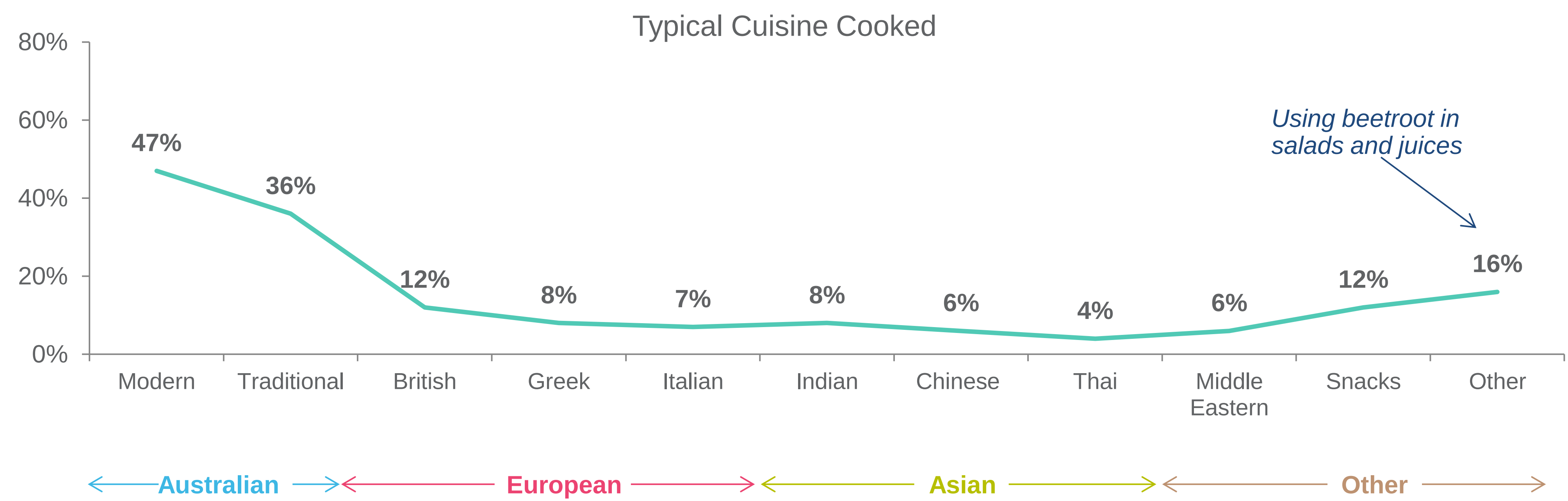
Sample N=241
Q7. Which of the following reasons best describes why you purchase <commodity> ?
Q8. Which reason best describes why you don't buy <commodity> more often?

Cooking Cuisine & Occasions

- Beetroot is generally consumed during week day occasions and for family meals.
- Consumers typically cook Australian cuisine, snacks and British are also popular cuisines.

Top 5 Consumption Occasions

Weekday Dinner	38%
Weekday Lunch	29%
Family meals	29%
Weekend Dinner	28%
Every-day	27%



Sample N=241
Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?

HAL Horticulture Australia
colmar brunton.

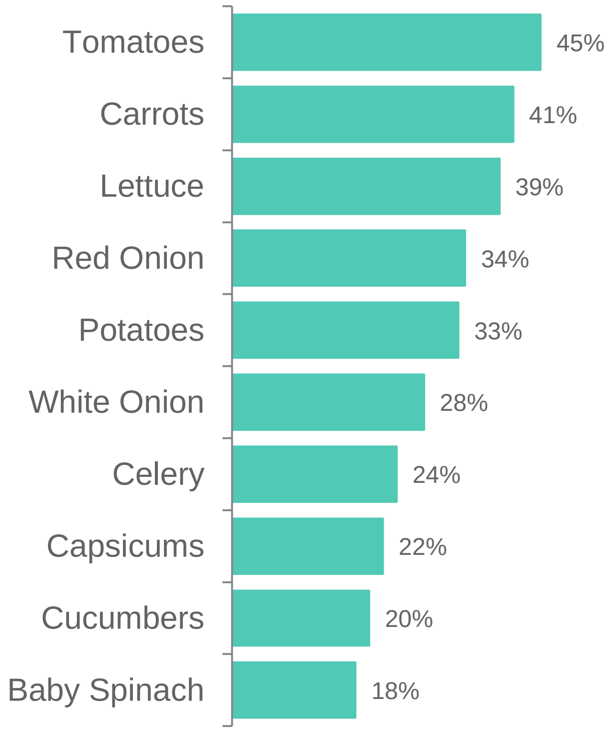
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Cooking Preferences

⇛ Consumers like to serve beetroot with tomatoes, carrots and lettuce, consistent with salad dishes.

⇛ Popular cooking methods are boiling, roasting and raw.

Top 10 Accompanying Vegetables



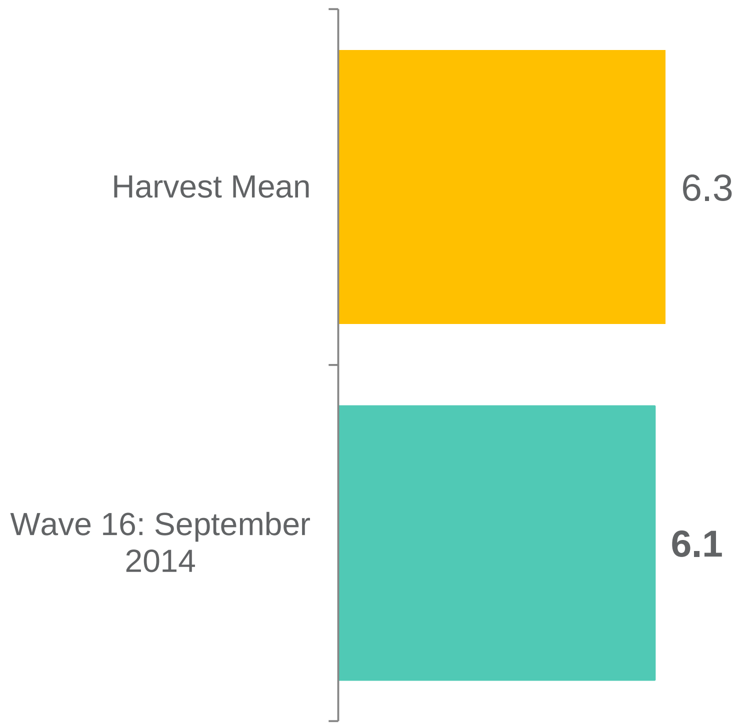
Top 10 Cooking Styles	
Boiling	41%
Roasting	33%
Raw	27%
Baking	17%
Steaming	16%
Soup	12%
Other	12%
Stewing	8%
Blend	7%
Microwave	5%

Sample N=241
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?

HAL Horticulture Australia colmar brunton.

Importance of Provenance

⇛ Beetroot provenance is fairly important to consumers, however this is below the Harvest mean for all vegetables tracked.



AUSTRALIAN MADE®

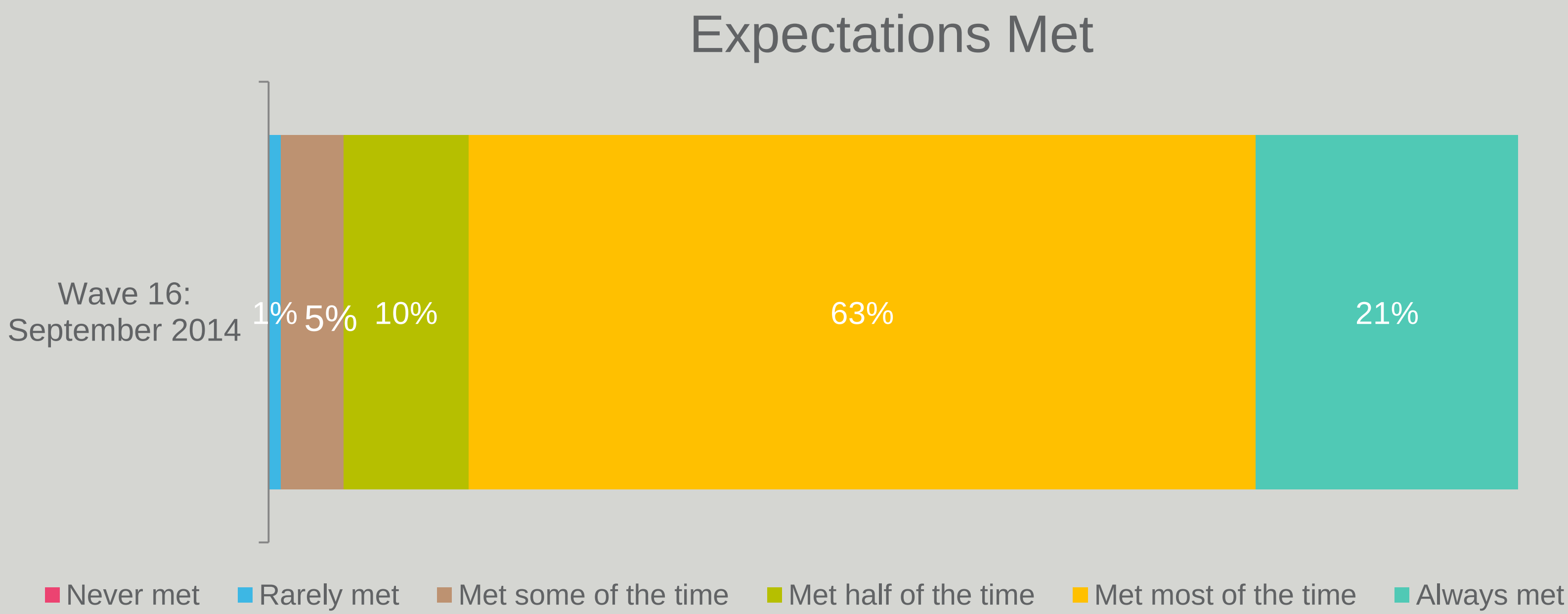
In Wave 3 consumers ranked “Australian Grown” as the most important factor in relation to provenance

Q14. When purchasing <commodity>, how important is Provenance to you?
Mean scores out of 10.
Sample N=241

Freshness and Longevity

Expected to stay fresh for **11.1** days

- Beetroot is expected to stay fresh for over 10 days once purchased, which is a relatively long time compared with other vegetables tracked.
- Expectations of freshness is met by the majority of consumers.



Sample N=241
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> ?

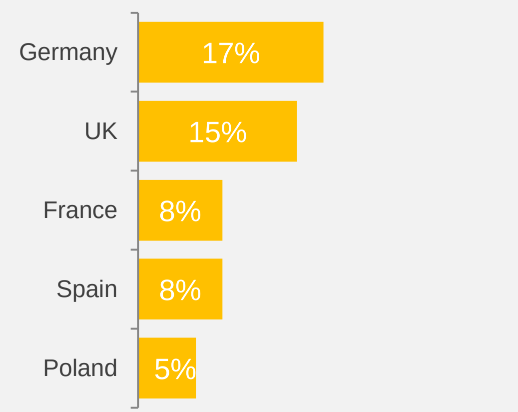
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Trends: Beetroot

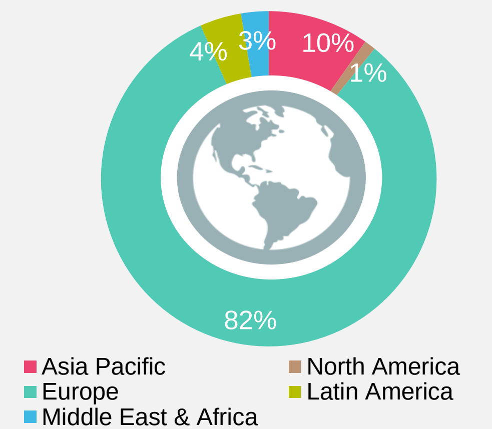
Beetroot Global NPDs
July – September 2014

There were 451 products containing beetroot as an ingredient launched globally. The majority of these launches occurred in Europe, in particular Germany and UK. Products were launched in dessert, dairy, snack and bakery categories. Health claims were frequently used on product labelling.

Country

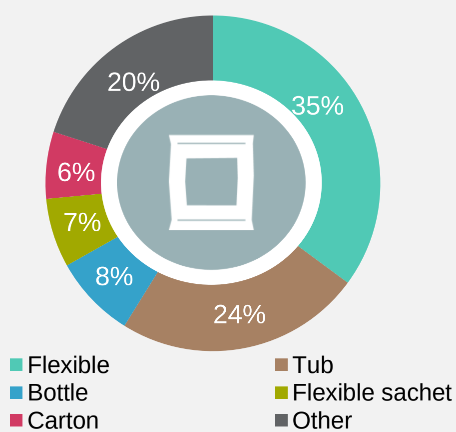


Region



451 Global Launches

Top Pack Formats



Categories

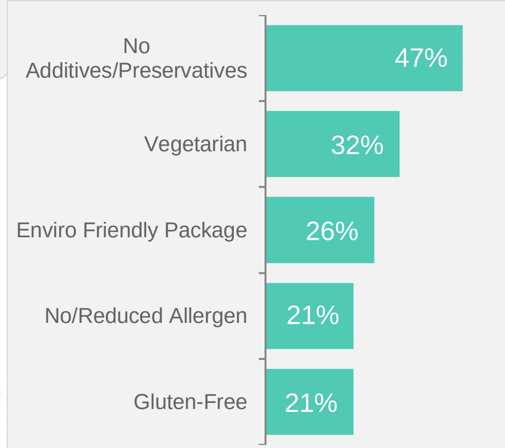
Desserts & Ice-cream 22%

Dairy 16%

Snacks 9%

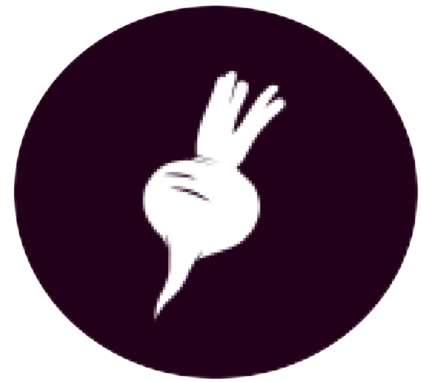
Bakery 8%

Top Claims



Beetroot Product Launches:
Last 3 Months (July - September 2014)
Summary

- There were 451 global beetroot products launched globally over the last three months.
- There were 11 products launched in Australia. A few of these products were canned and bottled pickled beetroot.
- The majority of products were launched in Europe (82%). Key countries for launches were Germany (17%) and the UK (15%).
- Flexible packaging was the most common format used (35%). Tub were also common formats (24%).
- Top launch categories were Desserts and Ice-creams (22%), Dairy (16%) and Snacks (9%). It appears that beetroot is largely used as a colouring for desserts, ice-creams and dairy.
- Popular claims were around health and nutrition, including No additives/preservatives (47%), Vegetarian (32%) and Reduced allergen (21%).
- The most innovative beetroot product launched was Ki-Way Beetroot Extract Isotonic Drink launched in Chile (examples of these can be found in the following pages).

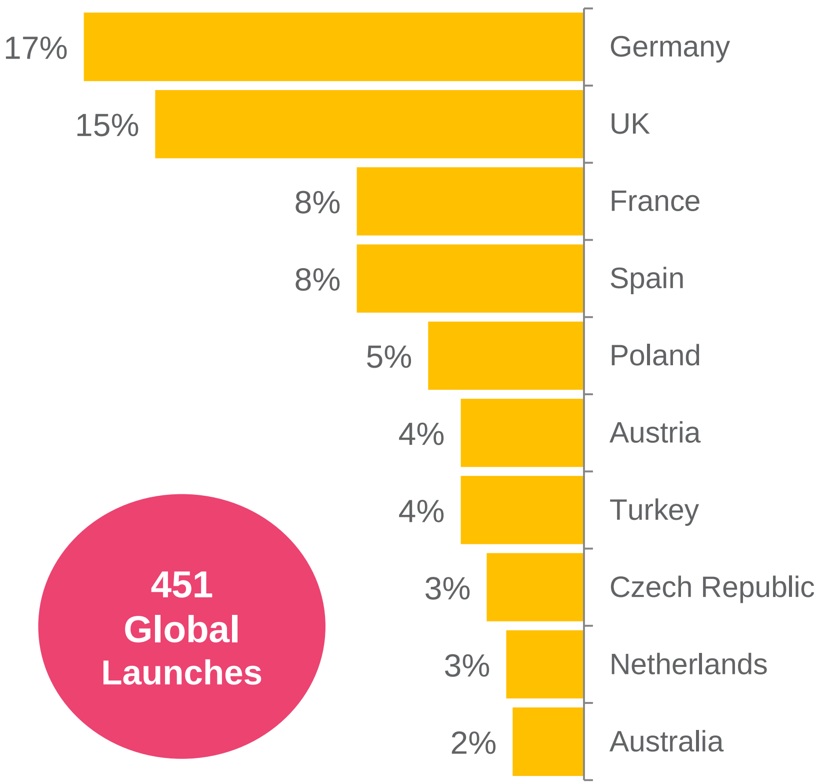


Source: Mintel (2014)

Beetroot Launches

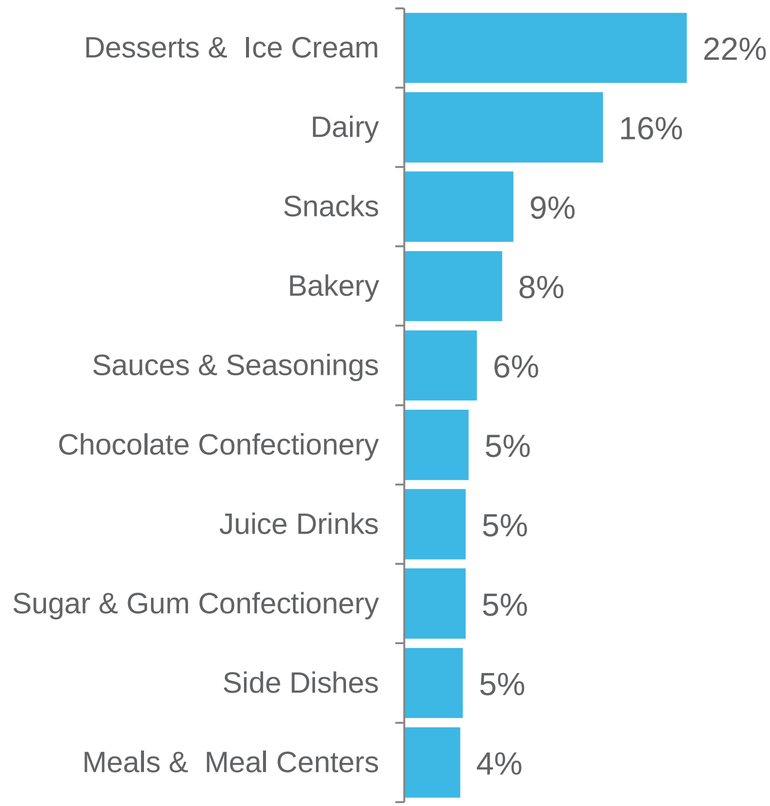
- The main countries for products launched were Germany and the UK.
- Products were launched in the dessert and ice cream category. Beetroots were primarily used as a colour additive in these products.

Top Launch Countries



451 Global Launches

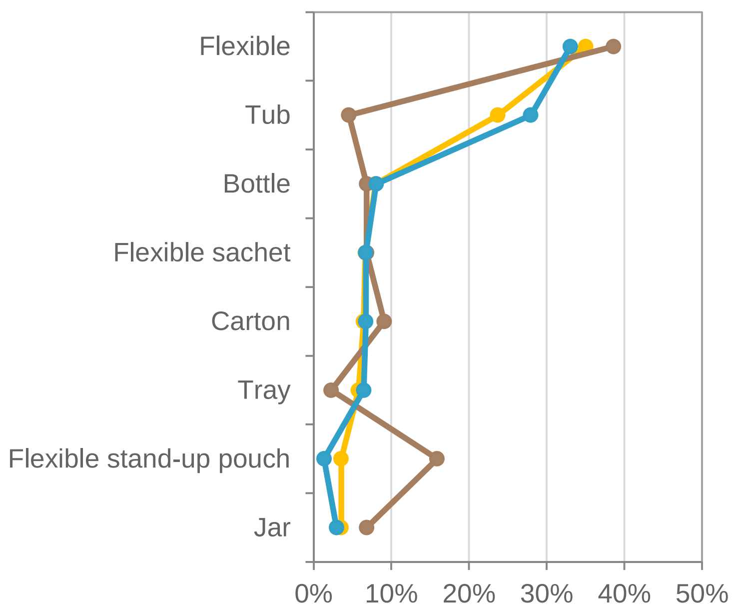
Top Launch Categories



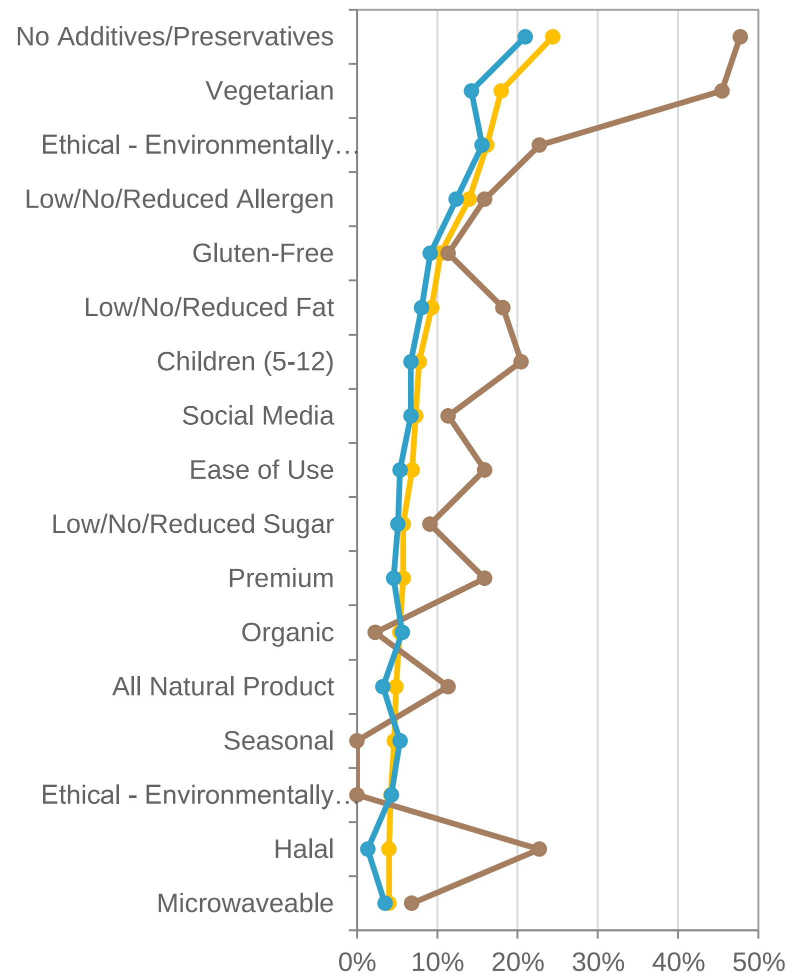
Claims & Pack Formats

- Globally the main pack formats used were flexible packaging and tubs. This was consistent between regions.
- Key claims were around health, including no additives/preservatives, reduced allergens and gluten free.

Pack Formats



Claims



Global (N=451) Asia Pacific (N=44)
Europe (N=372)

Only regions with n >30 are displayed

HAL

colmar brunton.

Innovative Beetroot Launches:
L3M (July – September 2014)

Crispy Natural Crunchy Beetroot Chips with Vinaigrette Flavour (Czech Republic)

Crispy Natural Susené Repné Plátky s Príchutí Winegret (Crunchy Beetroot Chips with Vinaigrette Flavour) are low in fat and were not fried or baked. The snack is full of nature, high in fibre and was made from three fresh beetroots. It retails in a 20g pack and is recommended by a diet expert Vít Chaloupka.

Claims:
High/Added Fiber, Low/No/Reduced Fat

Oatly Original Strawberry and Wild Berry Flavoured Oat Drink (Sweden)

Oatly Original Jordgubb och Skogsbär Havredryck (Original Strawberry and Wild Berry Flavoured Oat Drink) is now available in a newly designed bottle featuring the 'Wow No Cow!' slogan. The soy and milk free product contains a new flavour combination and retails in a recyclable 275ml bottle.

Claims:
High/Added Fiber, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Package

Friggs Naturmat Detox Green-Fruit-Berry Detoxifying Smoothie Mix Powder (Finland)

Friggs Naturmat Detox Viher Smoother Viher-Hedelmä-Marjajuomajauhe (Green-Fruit-Berry Detoxifying Green Smoothie Mix Powder) is now available. This powdered mix comprises a blend of 24 different ingredients with fruit and berries, vegetable juice, and plant-based enzyme concentrates.

Claims:
Botanical/Herbal, Energy (Functional), Digestive (Functional)

Ki-Way Beetroot Extract Isotonic Drink (Chile)

Ki-Way Bebida Isotónica Sabor Betarraga (Beetroot Extract Isotonic Drink) is said to include additional electrolytes and contains no artificial colouring. It is low in calories, contains 2g of beetroot extract, and retails in a 600ml pack.

Claims:
No Additives/Preservatives, Vitamin/Mineral Fortified, Low/No/Reduced Calorie

Source: Mintel (2014)

Innovative Beetroot Launches:
L3M (July – September 2014)

Actilife Vitamin C Effervescent Tablets (Switzerland)

Actilife Vitamin C Brausetabletten (Vitamin C Effervescent Tablets) have been reformulated featuring an improved recipe. This product contains orange and lemon flavours, sweeteners and 240mg vitamin C per tablet. Vitamin C contributes towards normal function of the immune system and reduces fatigue.

Claims:
Other (Functional), Immune System (Functional), Low/No/Reduced Sugar

Marks & Spencer Beetroot, Goats Cheese and Lentil Salad with a Beetroot & Mint Dip (Ireland)

Marks & Spencer Beetroot, Goats Cheese and Lentil Salad with a Beetroot & Mint Dip consists of a beetroot, lentils and aubergine salad with a beetroot and mint dip topped with goats cheese. This vegetarian product is a source of carbohydrates which are important for normal functioning of the brain, and provides two of the five a day.

Claims:
Brain & Nervous System (Functional), Vegetarian, Ethical - Environmentally Friendly Package, Low/No/Reduced Sugar

Wildebraam Diced Chilli Beetroot in a Mild Spicy Sauce (South Africa)

Wildebraam Diced Chilli Beetroot in a Mild Spicy Sauce is said to be handmade on the farm and contains no added preservatives. This choice grade diced beetroot can be served as a salad, or served with venison and braai meat. This product retails in a 435g jar.

Claims:
No Additives/Preservatives

Sia Glass Strawberry Flavoured Frozen Yogurt (Sweden)

Sia Glass Frozen Yoghurt Jordgubb (Strawberry Flavoured Frozen Yogurt) is described as fresh and delectable. This product is made with 76% Swedish yogurt, is free from fat, and retails in a 500ml recyclable pack.

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

Source: Mintel (2014)

Innovative Beetroot Launches:
L3M (July – September 2014)

Cykoria Red Borscht Soup (Poland)

Cykoria Barszcz Czerwony (Red Borscht Soup) is said to be quick and can be prepared by adding water. The product retails in a 60g pack.

Claims:
Time/Speed

Eger Veggie Falafels (Belgium)

Eger Veggie Falafels (Falafels) are now available. This vegetarian product is a source of protein, and can be pan-fried, oven-baked, microwaved, and barbecued. It retails in a 1.048kg pack.

Claims:
Vegetarian, Microwaveable

Zott Sahne Kefir Mild Cream Kefir on Red Fruit Compote (Germany)

Zott Sahne Kefir Mild Kefir auf Roten Grütze (Mild Cream Kefir on Red Fruit Compote) is new to the range. The product with 9% fruit and 10% fat in the milk part retails in a 175g tub.

Claims:
N/A

Vegesentials Beetroot, Blueberry & Cucumber Smoothie (UK)

Vegesentials Beetroot, Blueberry & Cucumber Smoothie is now available. This half fruit and half veg product is a natural source of vitamin C and potassium, is suitable for vegetarians and vegans, and 100% free from added sugar and water, additives, preservatives, concentrates, gluten and dairy.

Claims:
Low/No/Reduced Lactose, No Additives/Preservatives, Low/No/Reduced Allergen, Vegan, Ethical - Environmentally Friendly Package, Social Media, Low/No/Reduced Sugar, Ethical - Charity, Gluten-Free, No Animal Ingredients

Source: Mintel (2014)

Australian Beetroot Launches:
L3M (July – September 2014)

The Bar Counter Blueberry, Beetroot & Chia Bar

My Yummy Lunchbox Apple, Blueberry, Blackberry, Beetroot, Acai & Oat Puree Breakfast Squeezie

Golden Circle Pickled Baby Beetroot

My Yummy Lunchbox Blackcurrant, Beetroot & Acai Cookies

Coles Australian Diced Beetroot

Source: Mintel (2014)

Sweetpotato.

This is the first wave of sweetpotato tracking

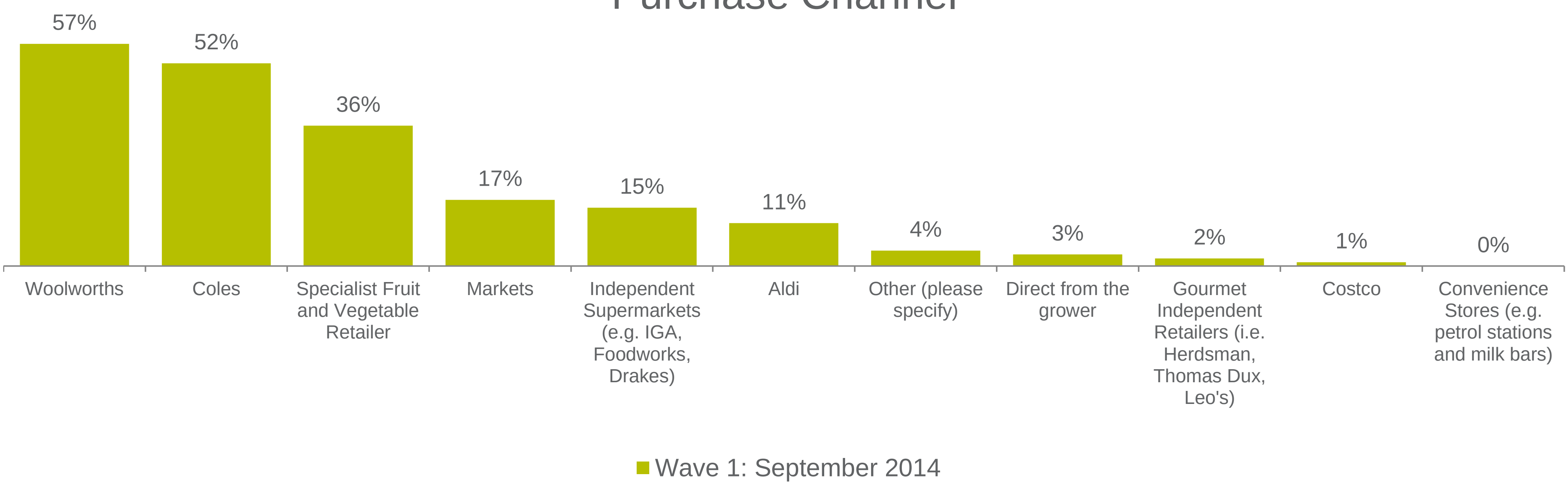
Purchase and Consumption Behaviour

Average Purchase **3.3** times per month

Average Consumption **7.2** times per month

- Sweetpotato is purchased on average 3 times a month, and consumed 7 times per month.
- Woolworths and Coles are the two biggest purchase channels for Sweetpotato.

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 1 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 average consumer typically purchased 1.1kg of sweetpotatoes in September 2014.

Recalled last spend

The average recalled last spend was for sweetpotatoes was $3.60.

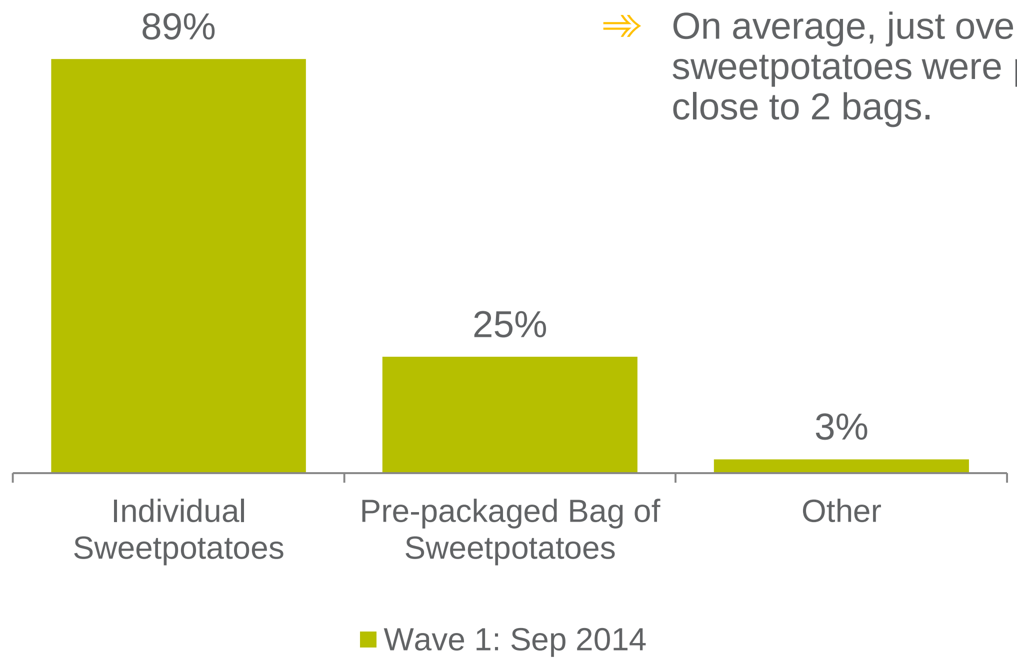
Value for money

On average, consumers perceived sweetpotatoes to be good value for money (6.5/10).

Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? 0-10 scale
Sample Wave 1 N=311

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

Pack Formats Purchased



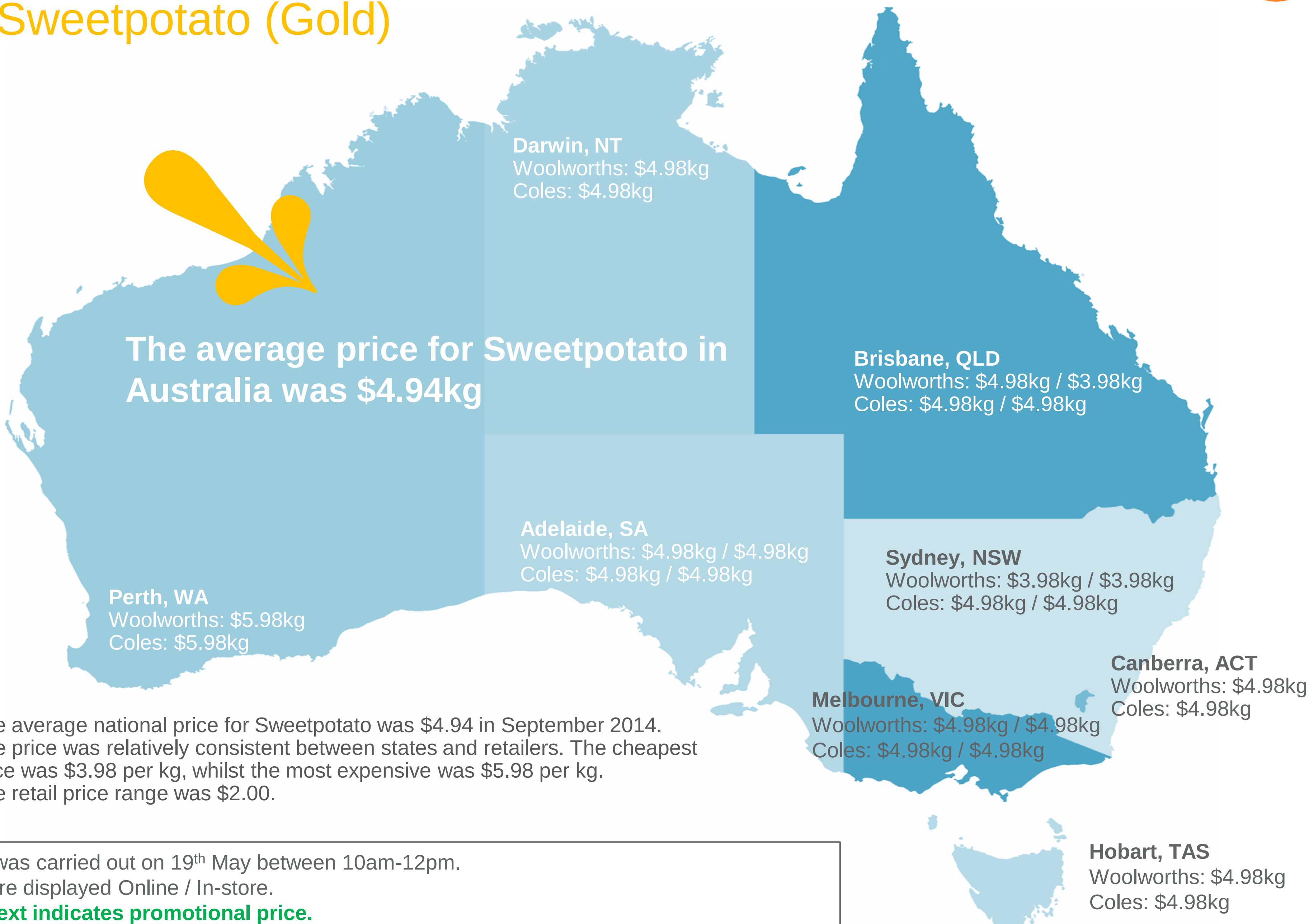
- Individual Sweetpotatoes were the main format purchased, followed by pre-packaged bags.
- On average, just over 2 individual sweetpotatoes were purchased at a time, and close to 2 bags.

	Individual	Bag
Wave 1	2.6	1.8

Q3a. How much <commodity> does this typically equate to?
Sample Wave 1 N=311

Online and In-store Commodity Prices

Sweetpotato (Gold)

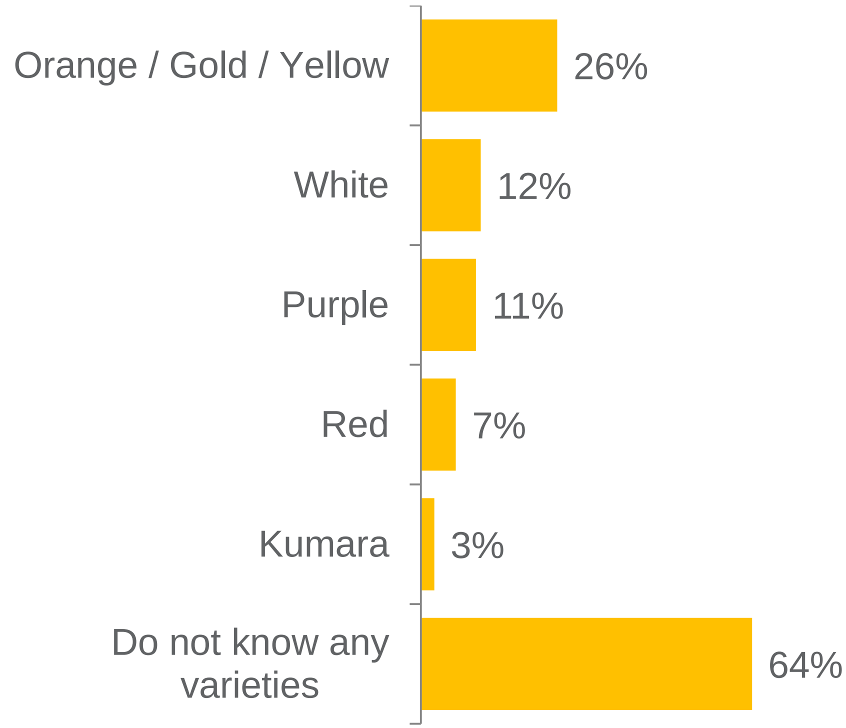


- The average national price for Sweetpotato was $4.94 in September 2014.
- The price was relatively consistent between states and retailers. The cheapest price was $3.98 per kg, whilst the most expensive was $5.98 per kg.
- The retail price range was $2.00.

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

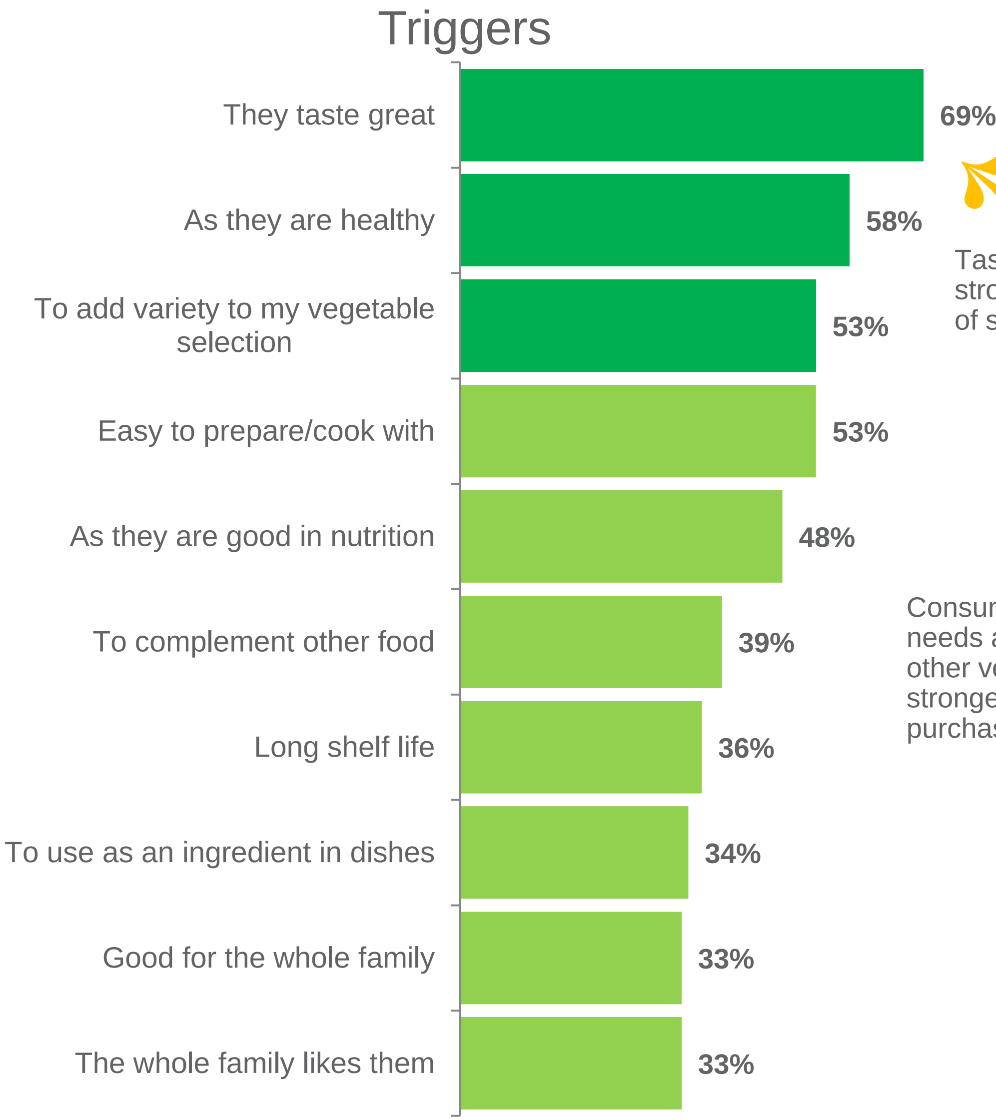
Spontaneous Awareness

- Roughly two thirds of respondents cannot recall a variety of sweetpotato.
- Those who did more often recalled the colour rather than a specific variety, with Orange / Gold / Yellow being the most recalled colour.
- 3% of consumers recalled Kumara as a variety of sweetpotato, which is another name, typically used in New Zealand.



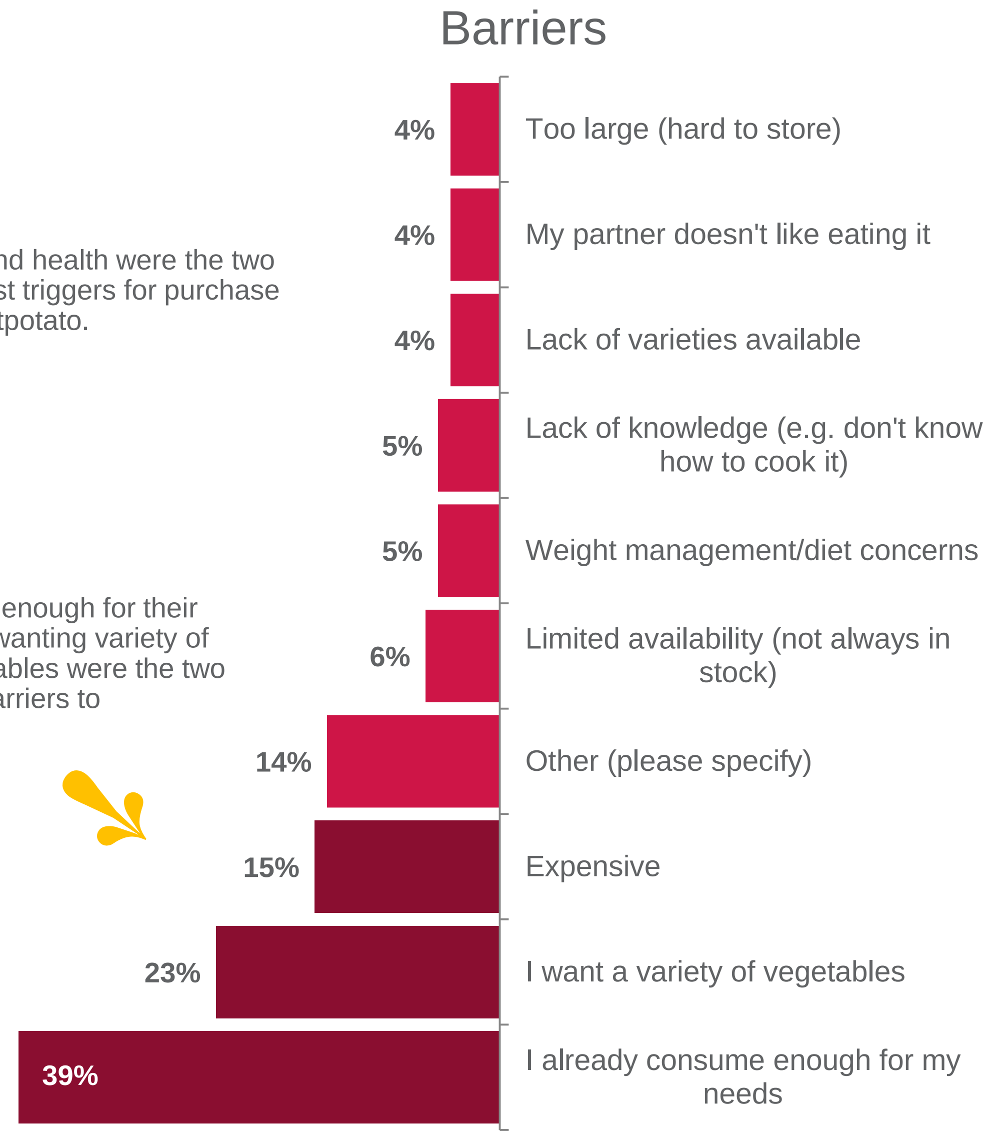
Q6a. What varieties of <commodity> are you aware of? (unprompted)
Sample Wave 1 N=311

Triggers & Barriers to Purchase



Taste and health were the two strongest triggers for purchase of sweetpotato.

Consuming enough for their needs and wanting variety of other vegetables were the two strongest barriers to purchase.



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 1 N=311

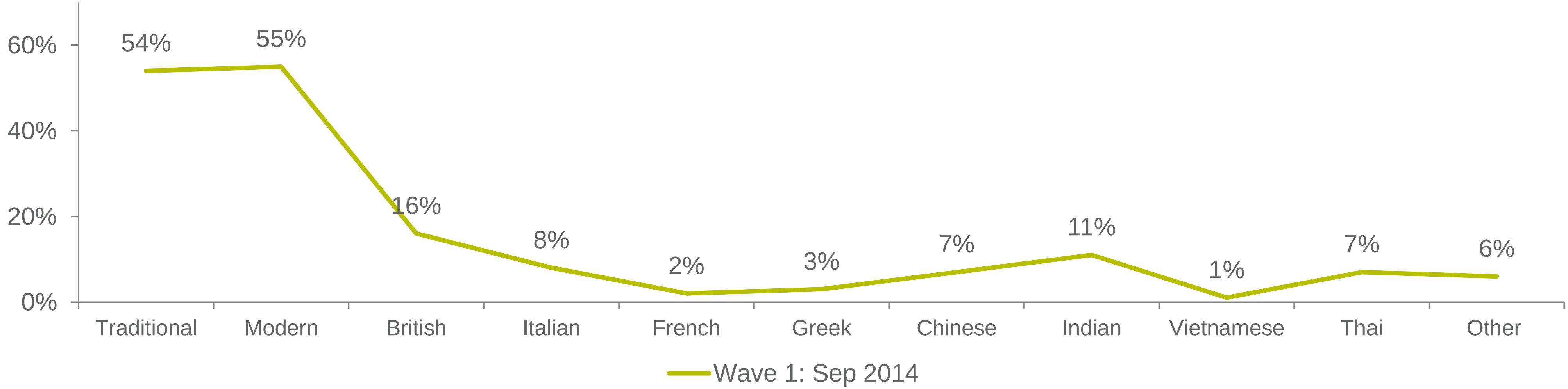
Cooking Cuisine and Occasions

Wave 12 Top 5 Consumption Occasions

Weekday Dinner	**60%**
Weekend Dinner	**44%**
Family meals	**36%**
Every-day	**32%**
Quick Meals	**13%**

- Predominantly sweetpotato is a dinner time vegetable cooked with Australian cuisine.

Typical Cuisine Cooked



Australian European Asian Other

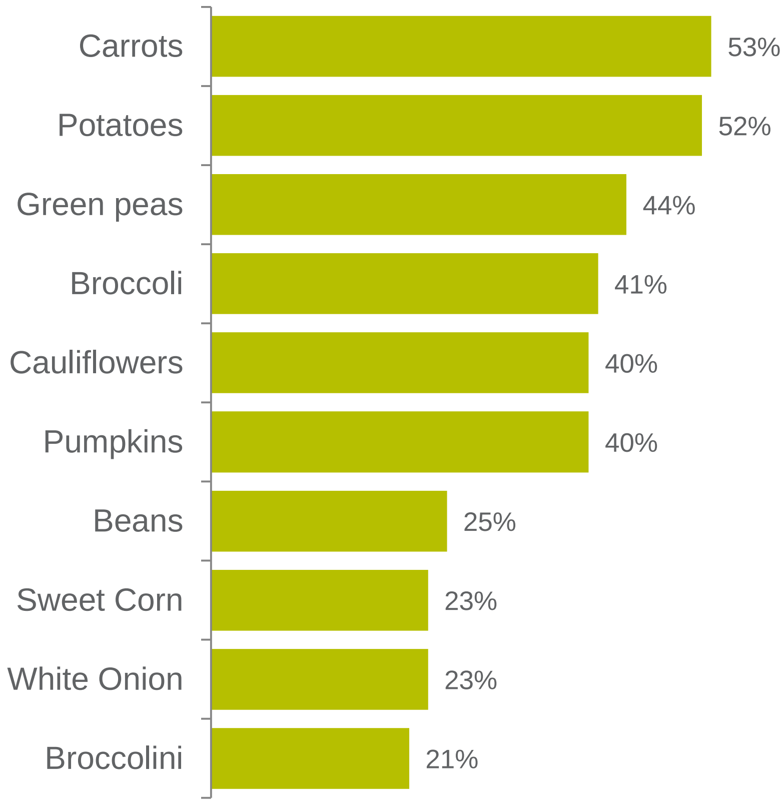
Q10. What cuisines do you cook/consume that use <commodity> ?
Q11. Which of the following occasions do you typically consume/use <commodity> ?
Sample Wave 1 N=311

colmar brunton.

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

Cooking Preferences

Top 10 Accompanying Vegetables



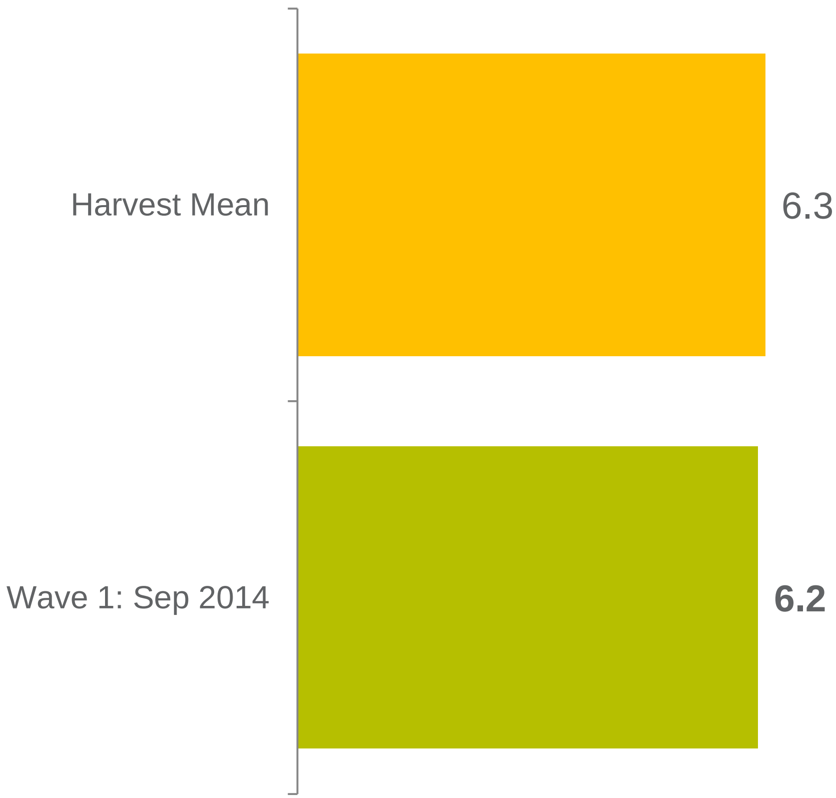
- Carrots and Potatoes were the two most commonly cooked with sweetpotato.
- Roasting was the number one cooking style, followed by baking and mashing.

Top Cooking Styles	
Roasting	61%
Baking	45%
Mashing	43%
Boiling	32%
Steaming	28%
Soup	23%
Microwave	13%
Stewing (slow cooking)	11%
Stir frying	8%
Shallow Frying	6%

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?
Sample Wave 1 N=311

Importance of Provenance

⇛ The importance of provenance for sweetpotato was slightly lower than the Harvest mean.



AUSTRALIAN MADE

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

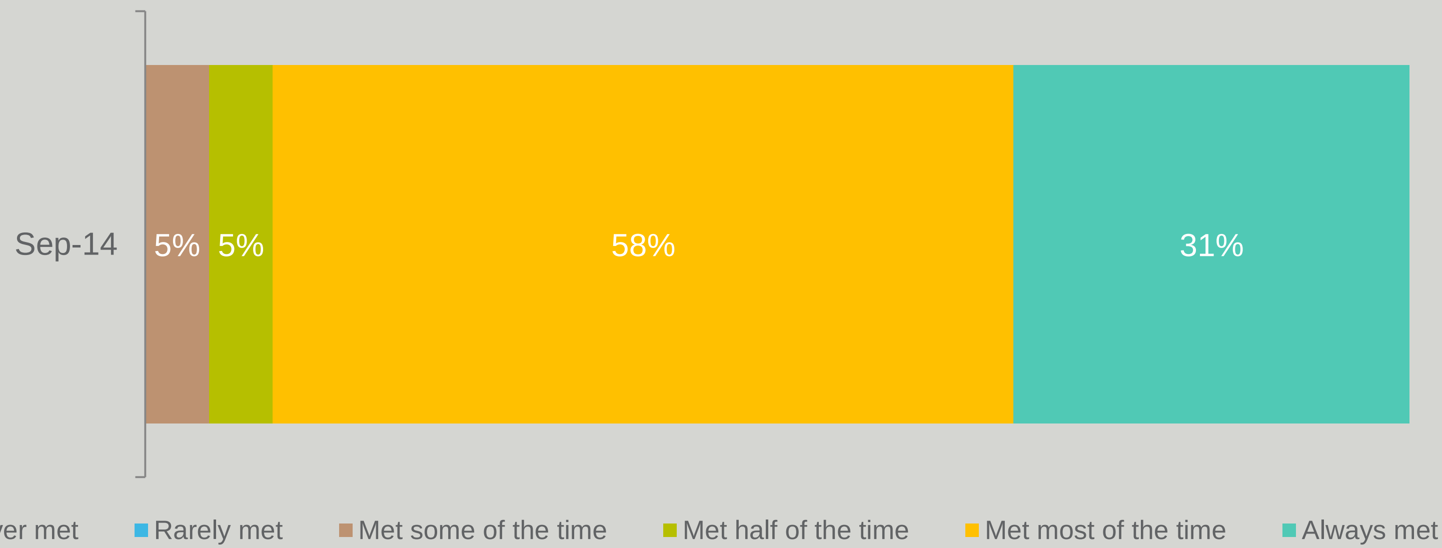
Q14. When purchasing <commodity>, how important is Provenance to you?
Mean scores out of 10.
Sample Wave 1 N=311

Freshness and Longevity

Expected to stay fresh for **13.1** days

- Consumers expected sweetpotatoes to remain fresh for 13 days.
- That expectation was met at least most of the time by 9 out 10 consumers.

Expectations Met



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> ?
Sample Wave 1 N=311

colmar brunton.

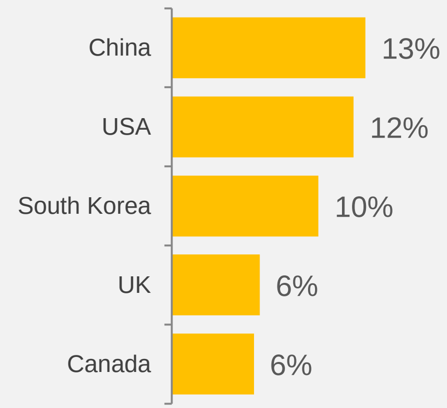
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Trends: Sweetpotato

Sweetpotato Global NPDs
July – September 2014

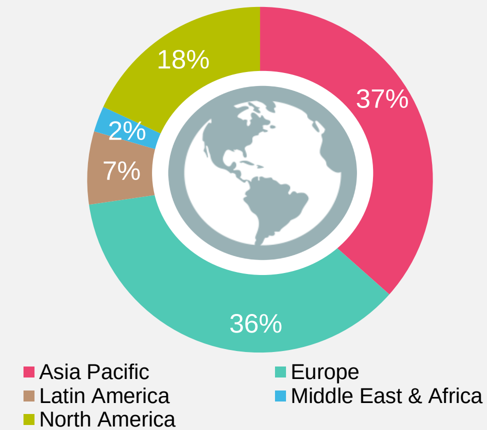
There were 249 global launches over the past three months that contained Sweetpotato as an ingredient. These were launched in Europe and Asia Pacific, particularly in China and USA. Key categories for launches were snacks, meals and bakery items.

Country

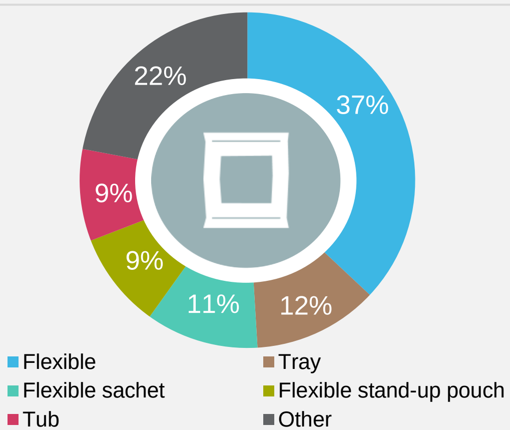


249 Global Launches

Region



Top Pack Formats



Categories

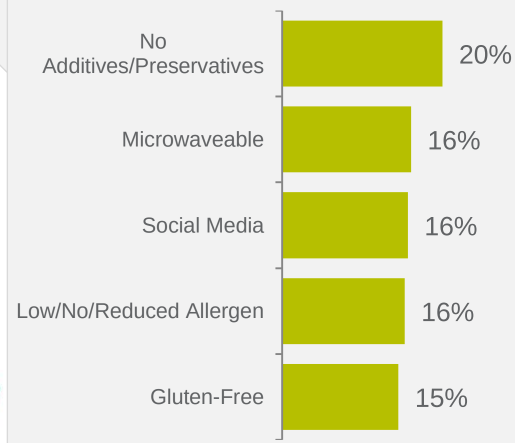
Snacks 30%

Meals 16%

Bakery 10%

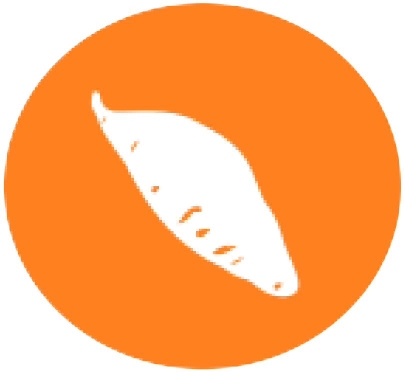
Soup 8%

Top Claims



Sweetpotato Product Launches:
Last 3 Months (July – September 2014)
Summary

- There were 249 Sweetpotato products launched globally over the last three months.
- There were three products launched in Australia, including a snack bar, lollies and soft drink.
- Products were predominately launched in Asia Pacific (37%) and Europe (36%).
- The main category launches were snacks (30%), meals (16%), bakery items (10%) and soup (8%).
- Common pack formats used were flexible packaging (37%), trays (12%) and flexible sachets (11%).
- Popular claims used on products were No additives/preservatives (20%), microwavable (16%) and social media (16%).
- The most innovative products launched used purple sweet potato as a core ingredient, including Thinh Thai Mini Milk Sweet Potato Candy in Vietnam. Other examples can be found on the following pages.

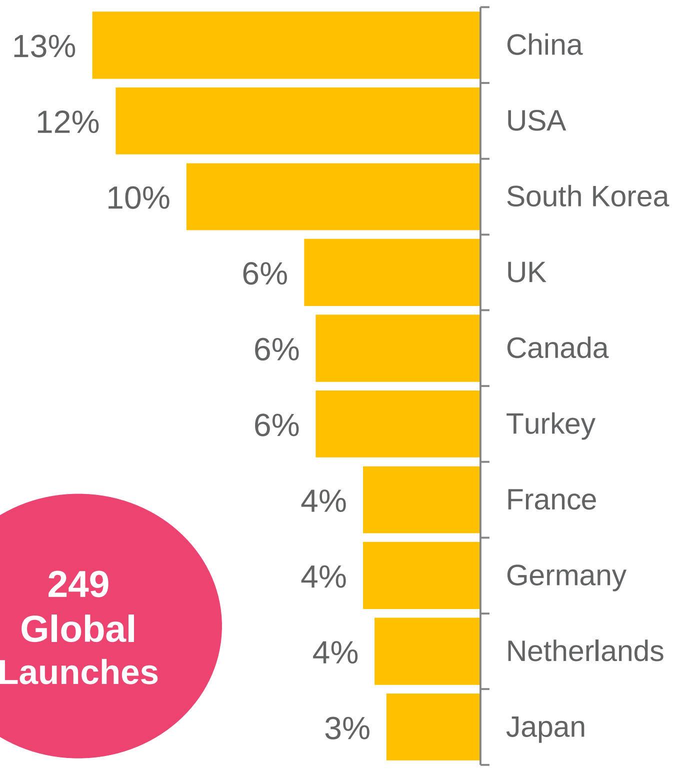


Source: Mintel (2014)

Sweetpotato Launches

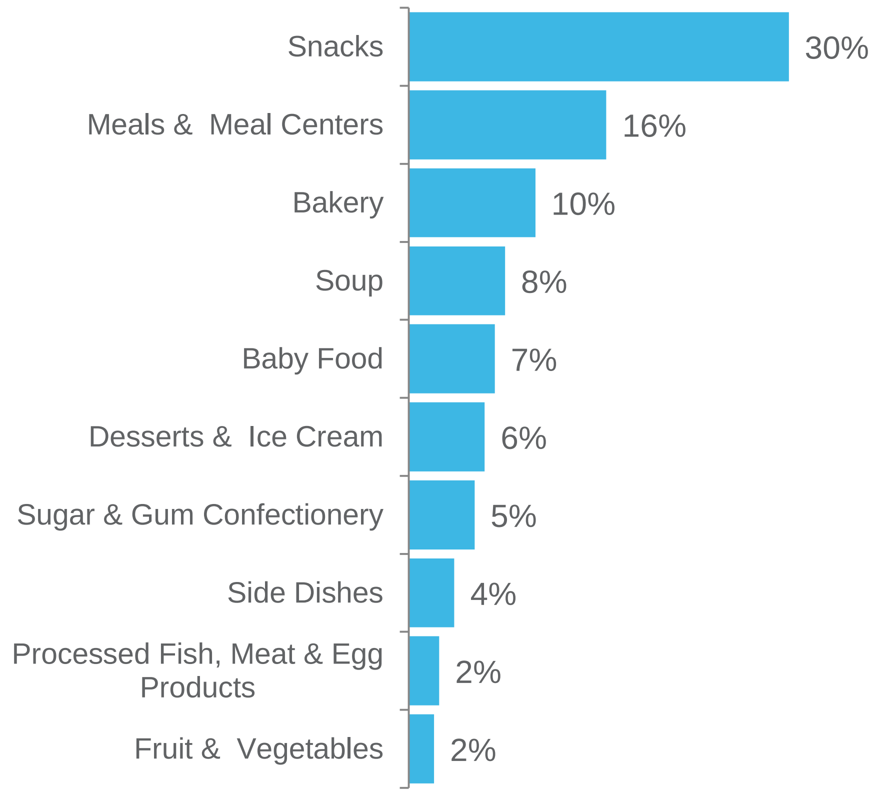
- The main countries for Sweetpotato launches were China and USA.
- The key categories for products were snacks, meals, bakery items and soup.

Top Launch Countries



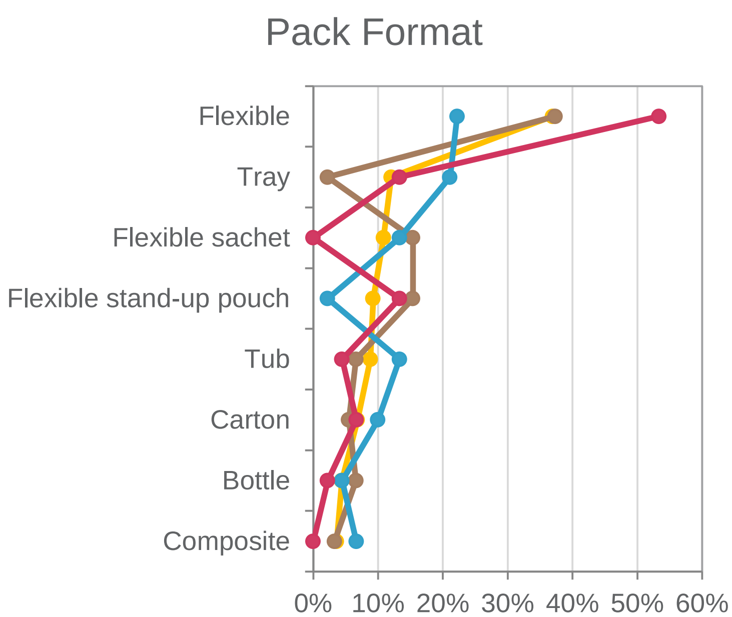
249 Global Launches

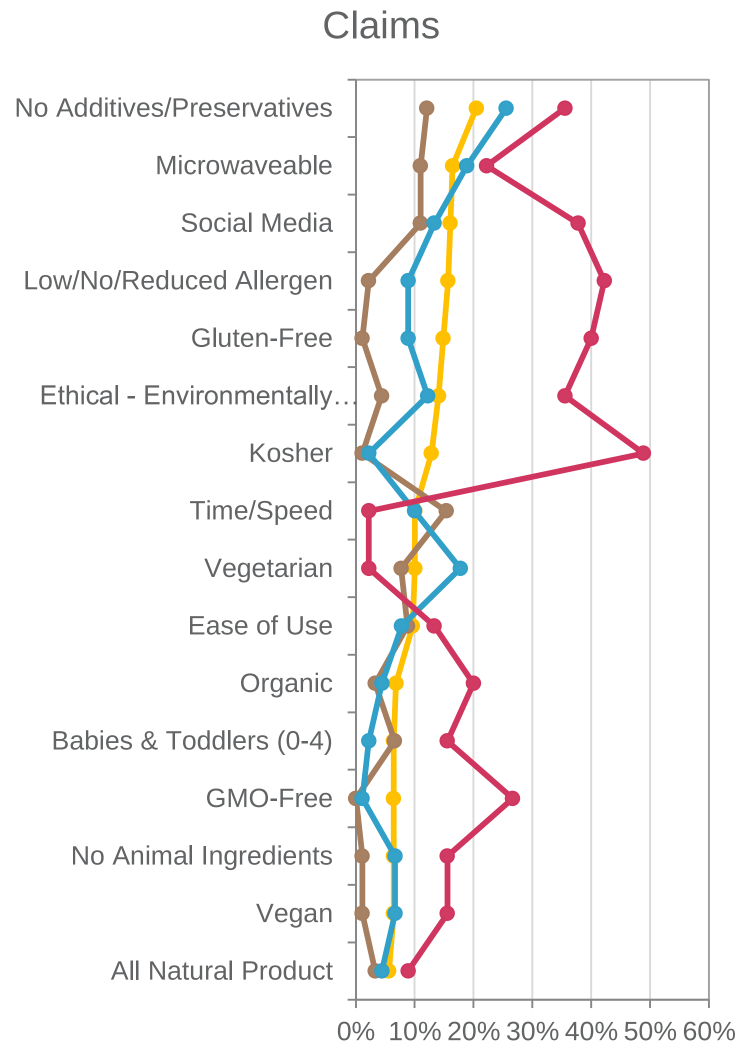
Top Launch Categories



Claims & Pack Formats

- Globally the main pack formats used were flexible packaging, especially in North America. Trays and flexible sachets were also commonly used.
- Product claims were around health (no additives/preservatives, reduced allergens and gluten free), microwavable and social media.





Global (N=249) Asia Pacific (N=91)
Europe (N=90) North America (N=45)

Only regions with n >30 are displayed

Innovative Sweetpotato Launches:
L3M (July – September 2014)

Happy Puffs Organic Sweet Potato Flavored Rice Puffs (Mexico)

Happy Puffs Alimento para Lactantes Sabor Batata Camote (Organic Sweet Potato Flavored Rice Puffs) are now available. This USDA organic finger food for babies is gluten free and contains 40% more puffs.

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

Pokka Sapporo Yasai Sweets Sweet Potato Pudding (Japan)

Pokka Sapporo Yasai Sweets Sweet Potato Pudding is designed to be prepared with chilled milk. It features sweet potato puree and vegetables, offering a gently sweet flavour and smooth texture. The product retails in a 150g pack. Launched on February 3, 2014 with an RRP of 210 yen.

Claims:
N/A

Compliments Balance Mango Orange Fruit & Vegetable Bars (Canada)

Compliments Balance Mango Orange Fruit & Vegetable Bars are made with fruit juices and fruit and vegetable purées. They are a source of vitamin C, and each 80ml bar is equivalent to one full serving of fruit and vegetables according to Canada's Food Guide to Healthy Eating. The product is free from fat and added artificial colour and flavour.

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

Nivoba Crystal Sweet Potato Vermicelli (China)

Nivoba Shui Jing Zi Shui Fen Si (Crystal Sweet Potato Vermicelli) is free from alum and is halal certified. It has a purple colour, and is said to be chewy and smooth. According to the manufacturer, the vermicelli has all the nutrients from the sweet potatoes, and as well as other nutrients including selenium and anthocyanidins.

Claims:
Halal

Source: Mintel (2014)

Innovative Sweetpotato Launches:
L3M (July – September 2014)

Shany Real Sweet Potato Cake (South Korea)

Shany Real Sweet Potato Cake is made with a sweet potato seasoning powder. The product retails in a 720g pack containing 10 units.

Claims:
Children (5-12)

Whole Grain Purple Sweet Potato Rice Chip (South Korea)

Whole Grain Purple Sweet Potato Rice Chip is made of 100% Korean grains and made with 59.8% brown rice, 0.5% purple sweet potato, and 39% rice. It is not fried, is free from gluten, low in fat and contains 0% cholesterol. The product retails in a 120g resealable pack.
.

Claims:
Low/No/Reduced Allergen, Low/No/Reduced Cholesterol, Convenient Packaging, Low/No/Reduced Fat, Gluten-Free, Wholegrain

Plum Organics Sweet Potato, Apple & Corn Organic Baby Food (Canda)

Plum Organics Sweet Potato, Apple & Corn Organic Baby Food (Stage 1) is suitable for babies between six months and up. This USDA organic certified baby food is free from genetically modified ingredients and artificial ingredients. It is made with unsweetened and unsalted ingredients. The kosher certified product retails in a 128ml BPA-free pack.

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

Woolworths Food Chunky Cottage Pie (South Africa)

Woolworths Food Chunky Cottage Pie with sweet potato mash and rosti consists of beef knuckle slow cooked for eight hours, shredded and added to a classic sauce made with onions, celery, carrots and bay leaves. It is topped with sweet and Nicola potatoes, mashed with butter and milk.

Claims:
Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Time/Speed, Ethical - Human

Source: Mintel (2014)

Innovative Sweetpotato Launches:
L3M (July – September 2014)

Rushui Dried Sweet Potato (China)

Rushui Hong Shu Gan Mi Jian (Dried Sweet Potato) is QS certified. This product retails in a 180g pack.

Claims:
N/A

Quang Phat Cheese Filled with Sweet Potato (Vietnam)

Quang Phat Khoai Lang Chien Pho Mai (Cheese Filled with Sweet Potato) is now available. This product retails in a 300g pack.

Claims:
N/A

Run Zhi Jia Purple Sweet Potato Flavoured Rice Snack (China)

Run Zhi Jia Zi Shu Wei Mi Guo Juan (Purple Sweet Potato Flavoured Rice Snack) is free from any colourings and preservatives. This product is non-fried and retails in a 388g pack and a 102g pack. The 102g pack was purchased at CR Vanguard, Nanta, China.

Claims:
No Additives/Preservatives

Thinh Thai Mini Milk Sweet Potato Candy (Vietnam)

Thinh Thai Keo Khoai Mini Vi Sua (Mini Milk Sweet Potato Candy) is described as a gift from nature. The delicious product retails in a 150g pack.

Claims:
N/A

Source: Mintel (2014)

Australian Sweetpotato Launches:
L3M (July – September 2014)

The Bar Counter Ancients Grains Carrot, Apricot, Amarath & Yoghurt Bar

The Bar Counter Ancients Grains Carrot, Apricot, Amarath & Yoghurt Bar is free from wheat free and preservatives, has natural flavours and colours, is a source of fibre and low in sodium. This premium product retails in a 40g pack.

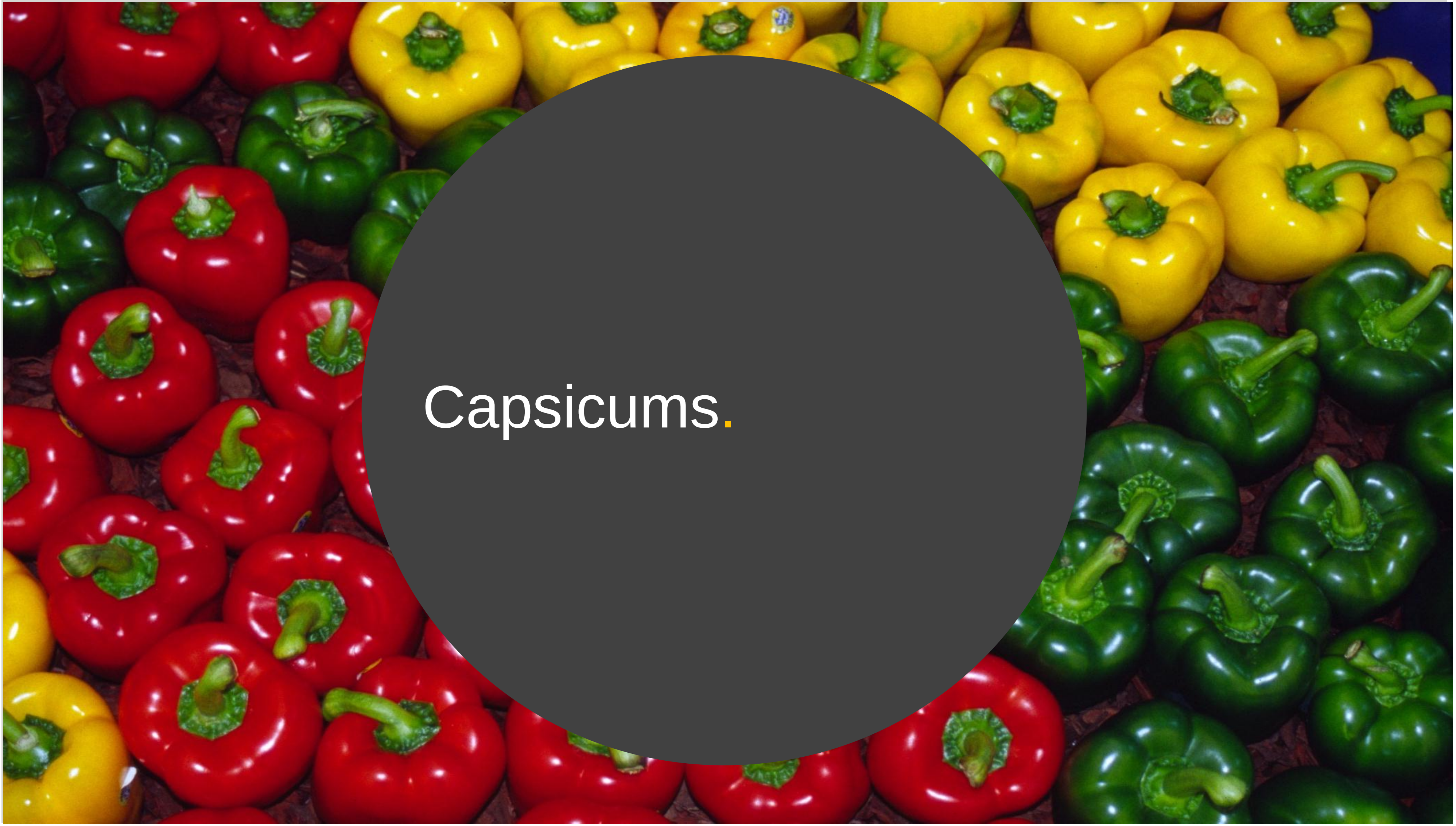
Haribo Turtles Fruit Jelly Filling Gums

Haribo Turtles Fruit Fruit Jelly Filling Gums are free from artificial colours. The product retails in a 175g pack featuring children inspired graphics.

Bundaberg Peachee Sparkling Drink

Bundaberg Peachee Sparkling Drink is made using real peach nectar. The product is available in a 4 x 340ml recyclable pack.

Source: Mintel (2014)



Capsicums.

Purchase and Consumption Behaviour

Average Purchase **3.8** times per month

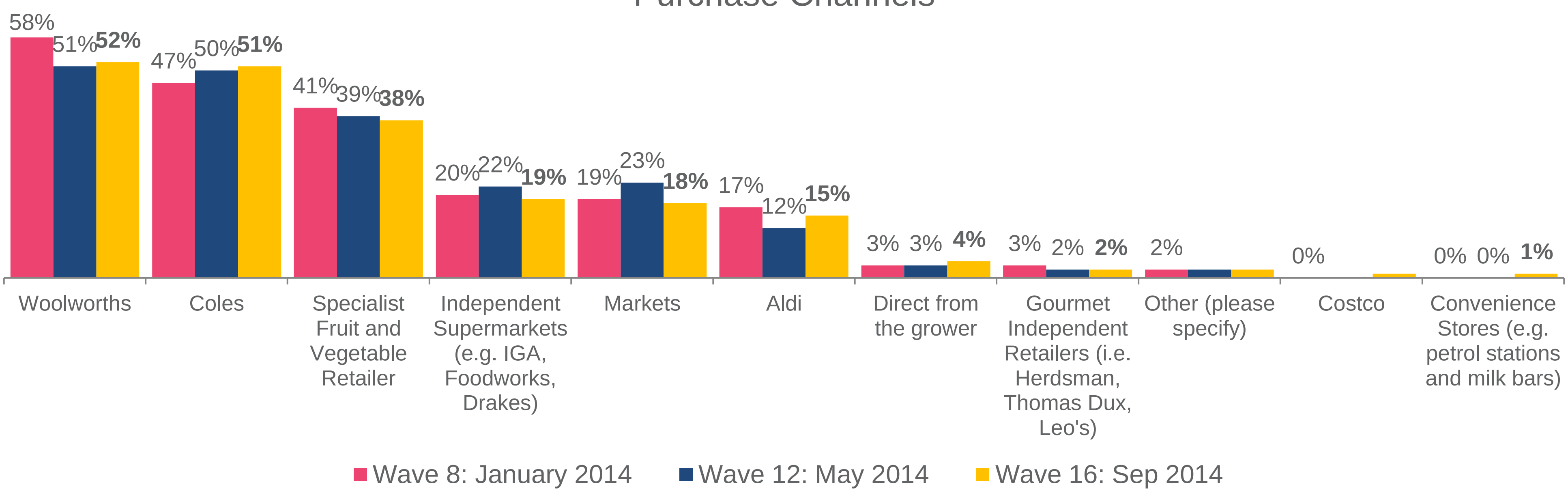
▲ 4.2 times, Wave 8
▲ 4.2 times, Wave 12

Average Consumption **9.6** times per month

▲ 10.2 times, Wave 8
▲ 10.5 times, Wave 12

- Purchase and consumption frequency have fallen from previous waves.
- Capsicum was generally purchased from mainstream and specialist retailers.
- There has been no substantial change in purchase channel across waves.

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 8, N=313, Wave 12, N=315 and Wave 16, N=309

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 700g of Capsicum in Sep 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 $3.70. This was a decrease from previous waves.

▲ $4.00, Wave 8
▲ $3.90, Wave 12

Value for money

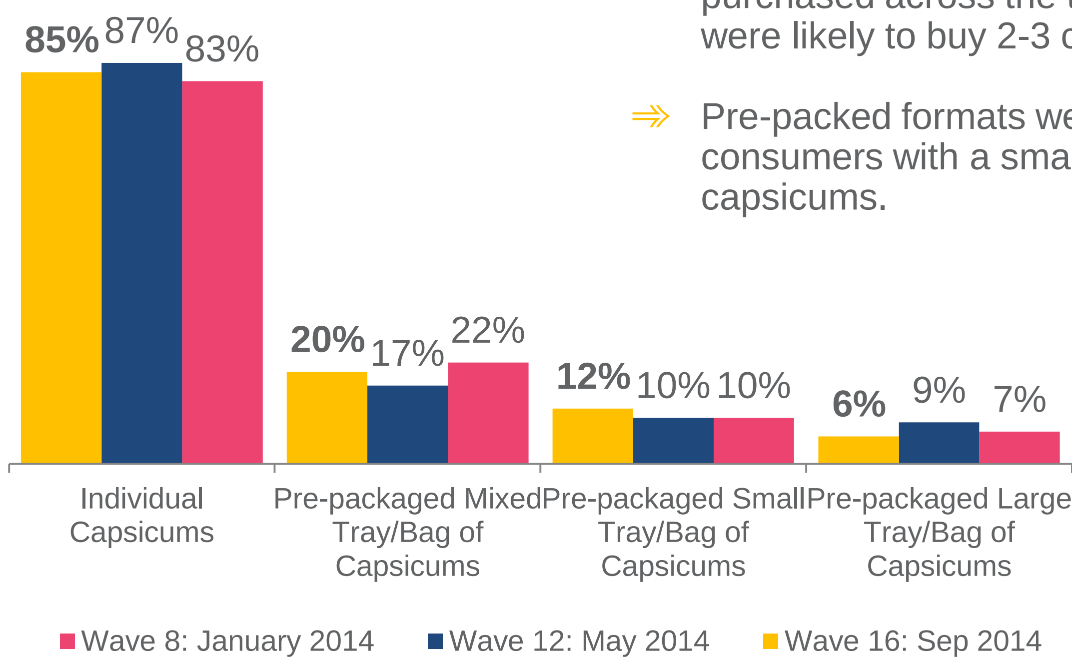
On average, consumers perceived Capsicum to be fair value for money (5.9/10). This represents an increase from the previous two waves.

▼ 5.8/10, Wave 8
▼ 5.6/10, Wave 12

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 8, N=313, Wave 12, N=315 and Wave 16, N=309

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

Pack Formats Purchased



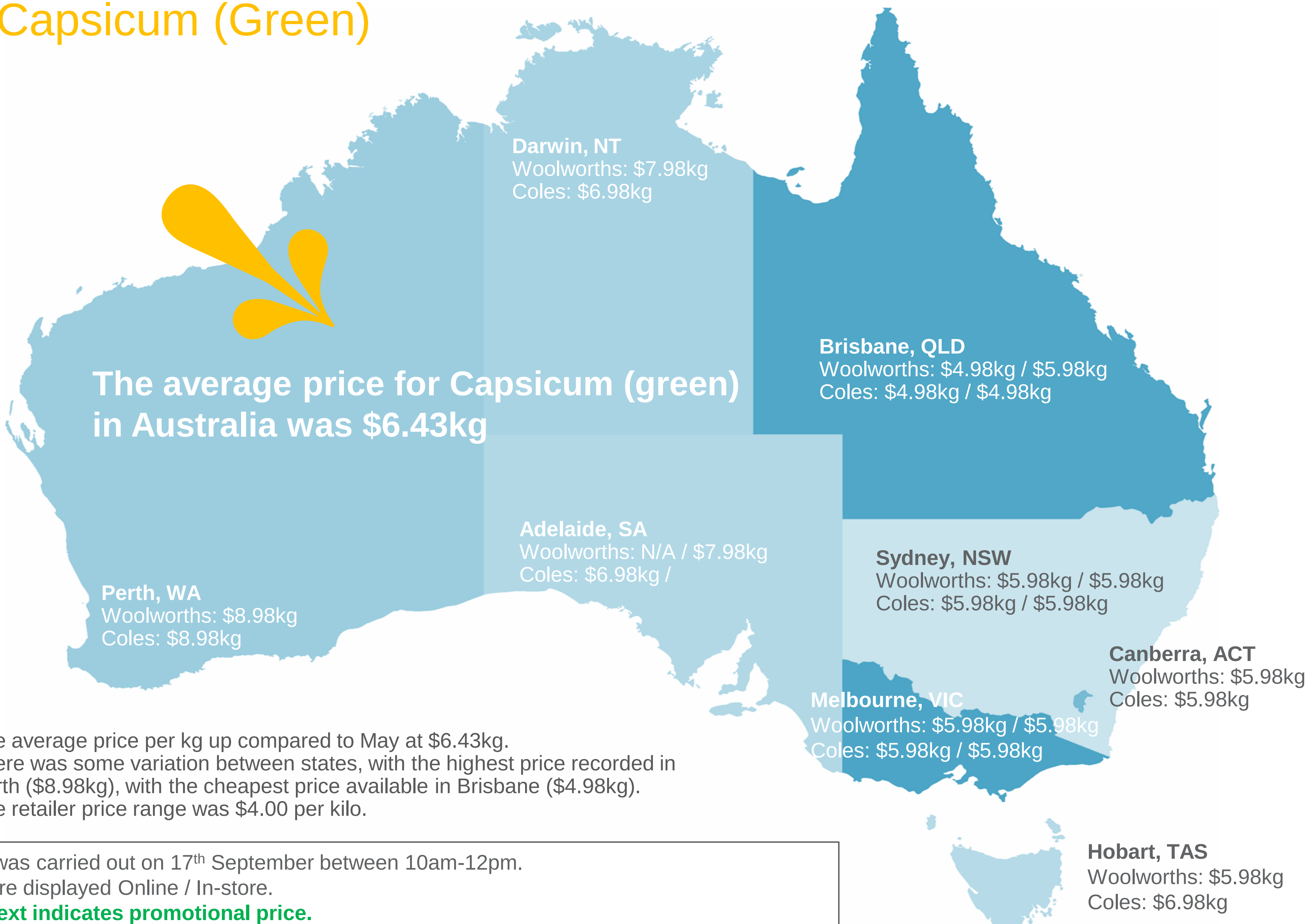
- Individual capsicums were the most popular format purchased across the three waves. Consumers were likely to buy 2-3 capsicums per shop.
- Pre-packed formats were not very important to consumers with a small minority buying trays of capsicums.

	Individual	Mixed Tray	Small Tray	Large Tray
Wave 16	2.5	1.8	1.7	2.2
Wave 12	2.4	1.4	1.8	1.6
Wave 8	2.6	1.8	1.8	2.3

Q3a. How much <commodity> does this typically equate to?
Sample Wave 8, N=313, Wave 12, N=315 and Wave 16, N=309

Online and In-store Commodity Prices

Capsicum (Green)



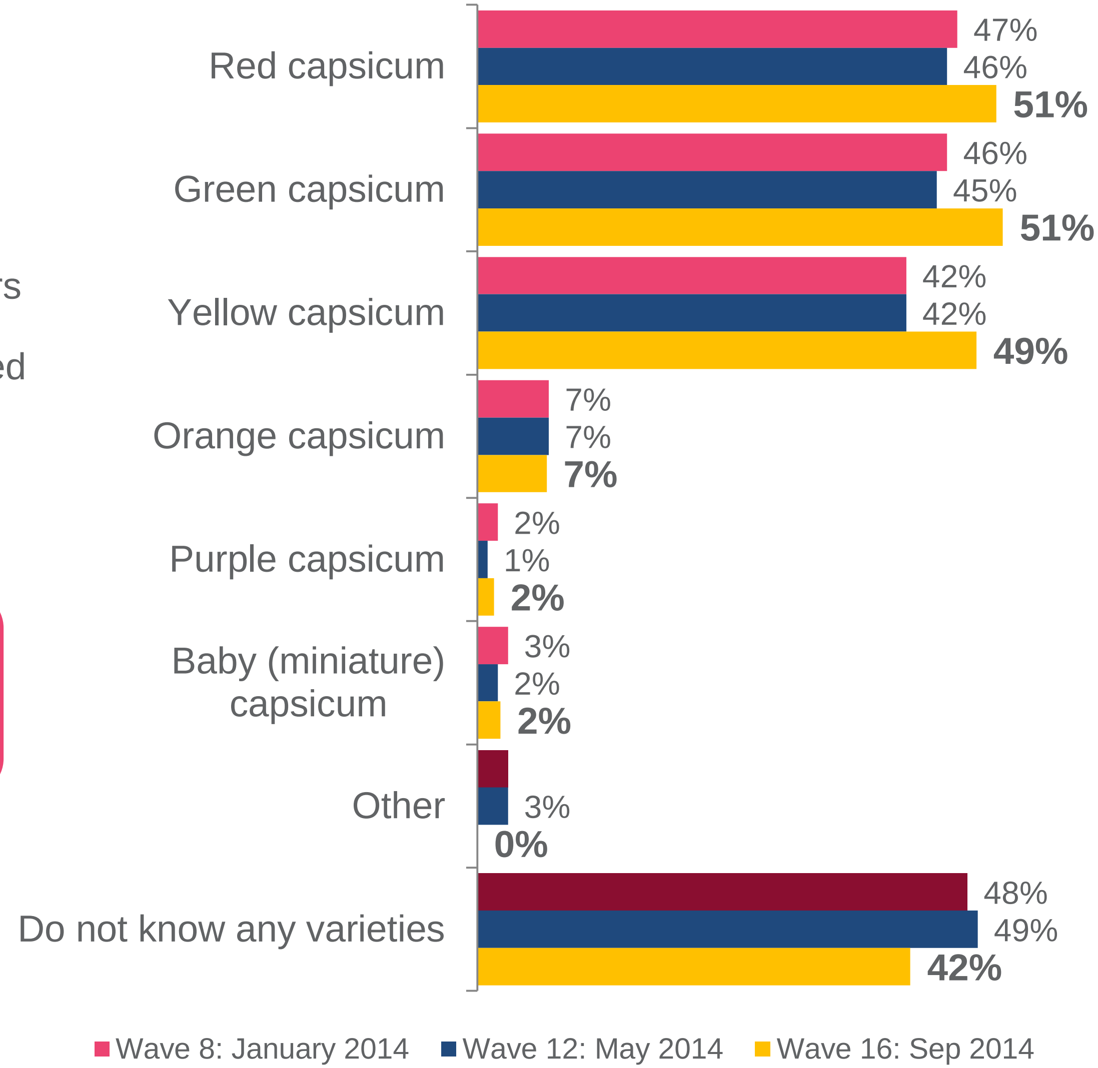
- The average price per kg up compared to May at $6.43kg.
- There was some variation between states, with the highest price recorded in Perth ($8.98kg), with the cheapest price available in Brisbane ($4.98kg).
- The retailer price range was $4.00 per kilo.

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

Spontaneous Awareness

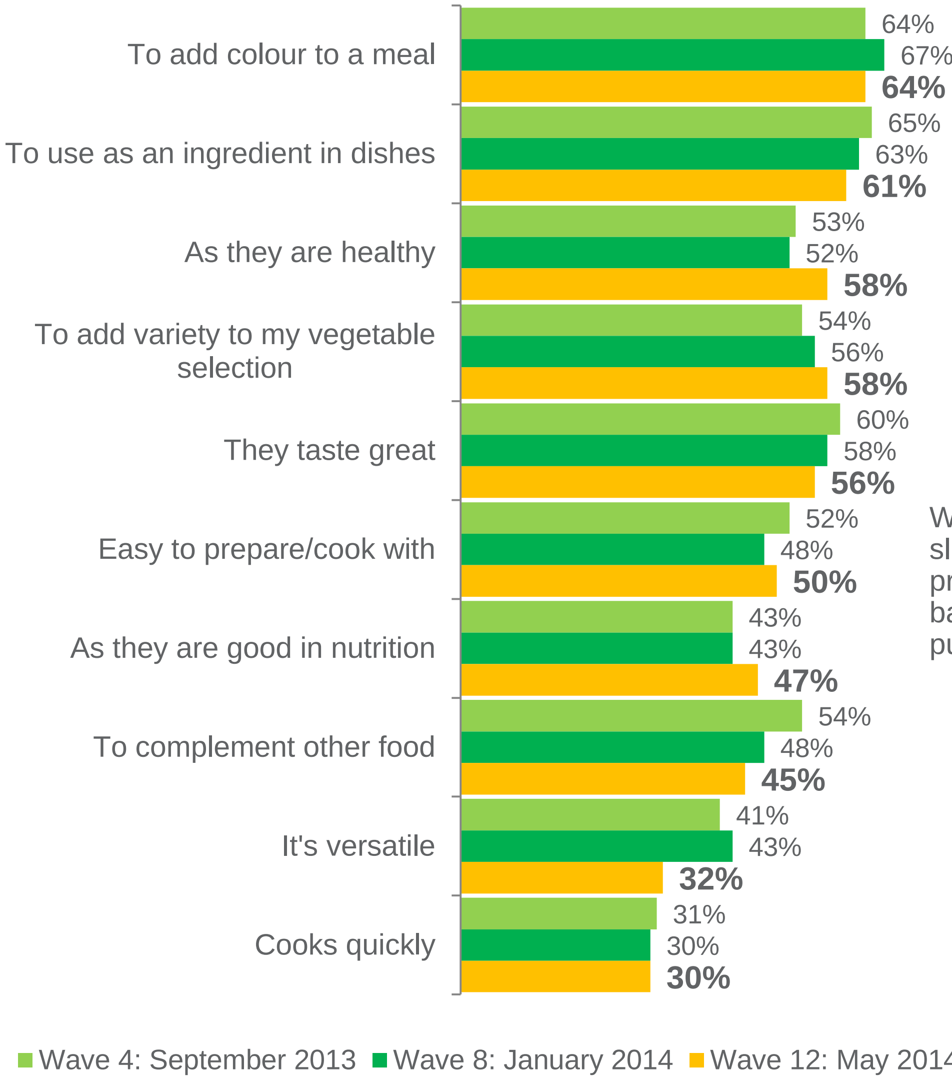
- In Wave 16 a greater proportion cited red, green and yellow capsicums, while fewer stated they ‘Do not know any varieties’.
- Consistent with previous waves, consumers recall the colour of capsicum much more often than any specific variety, as evidenced by the below quote.

‘Normal type - red, green and yellow’



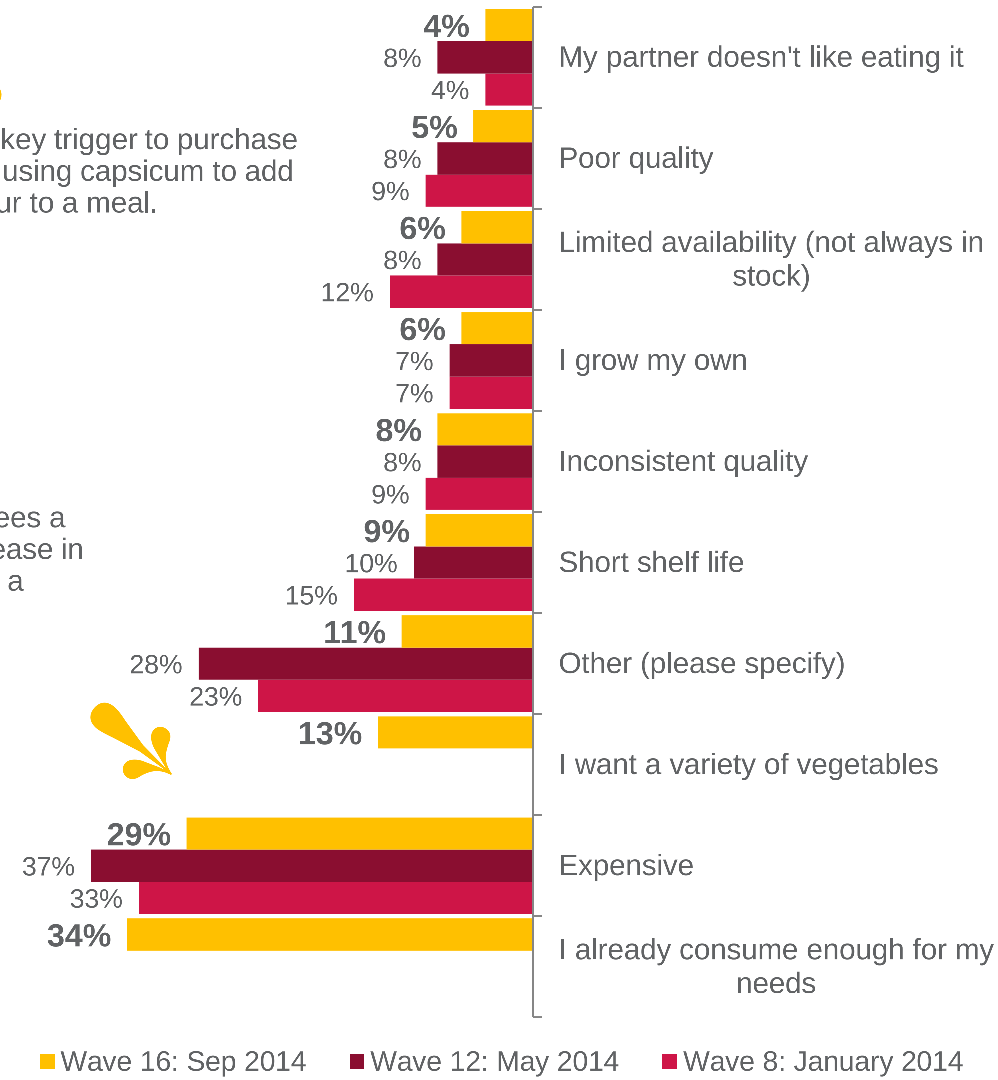
Q6a. What varieties of <commodity> are you aware of? (unprompted)
Sample Wave 8, N=313, Wave 12, N=315 and Wave 16, N=309

Triggers and Barriers to Purchase



The key trigger to purchase was using capsicum to add colour to a meal.

Wave 16 sees a slight decrease in price being a barrier to purchase.



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 8, N=313, Wave 12, N=315 and Wave 16, N=309

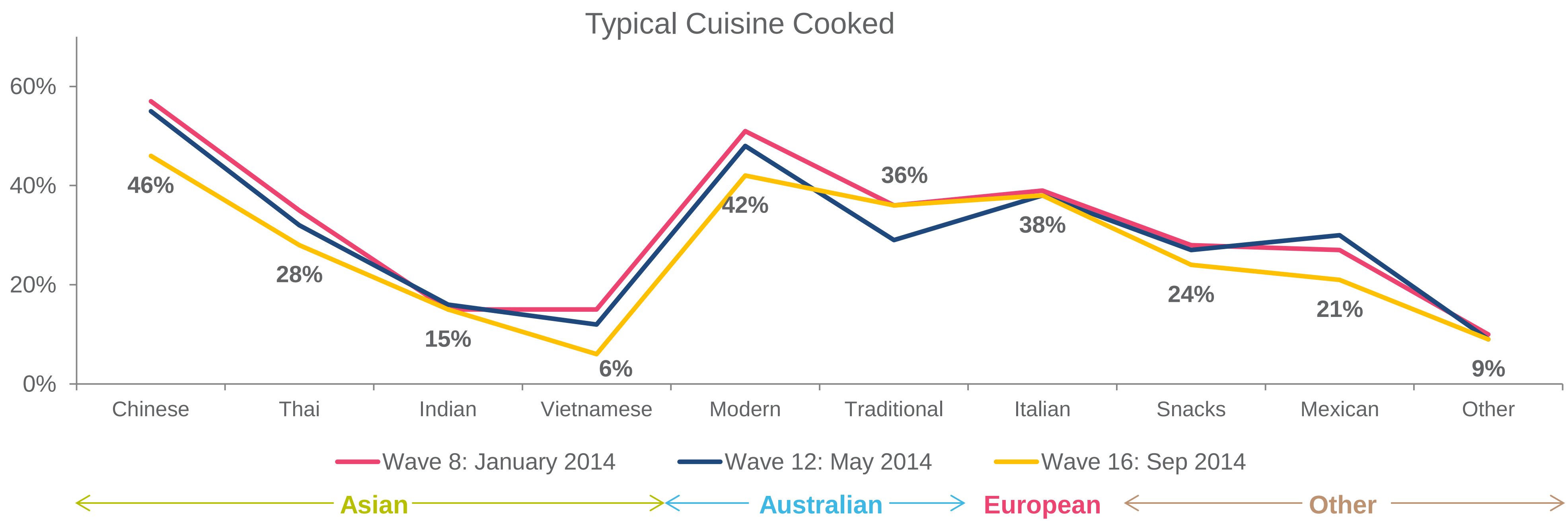
colmar brunton.

Cooking Cuisine and Occasions

- Wave 16 sees a fall in capsicum being used in most cuisines, excluding Indian and Italian.
- The top 5 consumption occasions have remained consistent across waves.

Wave 12 Top 5 Consumption Occasions

	Wave 16	Wave 12	Wave 8
Weekday Dinner	**56%**	54%	57%
Quick Meals	**39%**	41%	43%
Weekend Dinner	**39%**	39%	42%
Family meals	**39%**	37%	39%
Every-day	**38%**	38%	35%

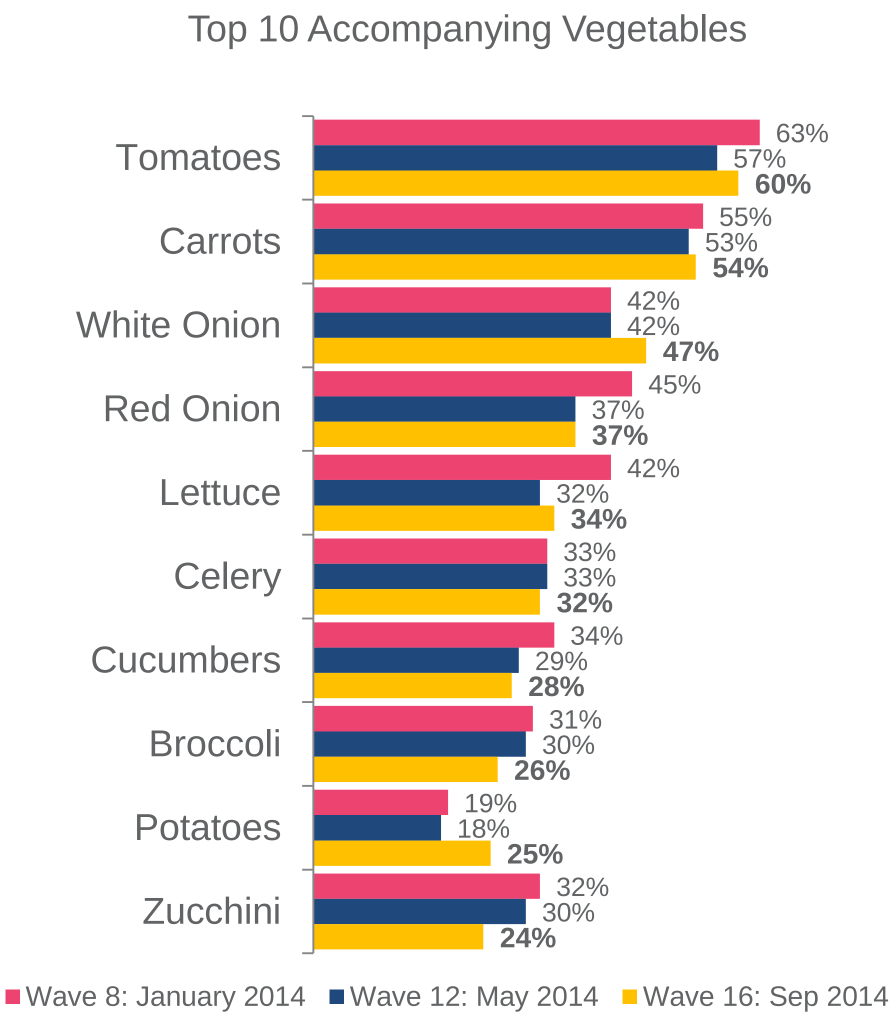


Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?
Sample Wave 8, N=313, Wave 12, N=315 and Wave 16, N=309

colmar brunton.

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

Cooking Preferences



- Capsicum was typically served with tomatoes and carrots. There was a slight increase in consumption with white onion.
- On trend with Asian cuisine, the main cooking technique for capsicum was stir-frying. Consistent with previous waves, over half of respondents also consumed capsicum raw.

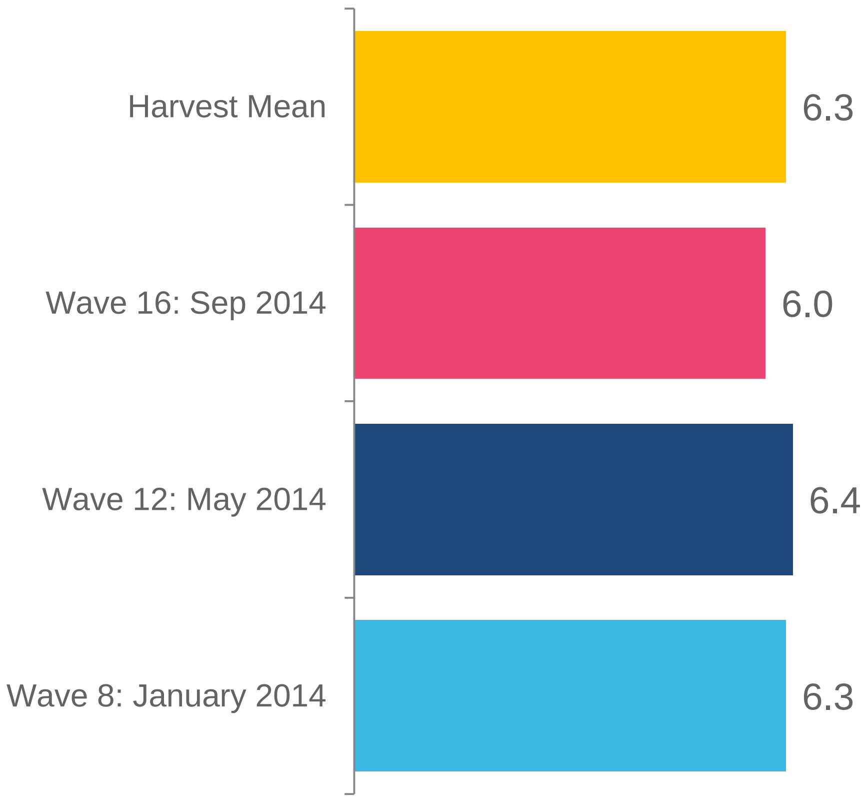
Top 10 Cooking Styles

	Wave 8	Wave 12	Wave 16
Stir frying	77%	74%	**71%**
Raw	55%	53%	**56%**
Roasting	28%	28%	**35%**
Stewing (slow cooking)	16%	20%	**21%**
Sautéing	20%	23%	**21%**
Grilling	21%	24%	**20%**
Baking	19%	18%	**17%**
Shallow Frying	12%	12%	**12%**
Soup	12%	16%	**12%**
Steaming	12%	10%	**8%**

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?
Sample Wave 8, N=313, Wave 12, N=315 and Wave 16, N=309

Importance of Provenance

⇛ The importance of capsicum provenance has fallen to it's lowest point since the beginning of tracking, and is now below the Harvest Mean.



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 8, N=313, Wave 12, N=315 and Wave 16, N=309

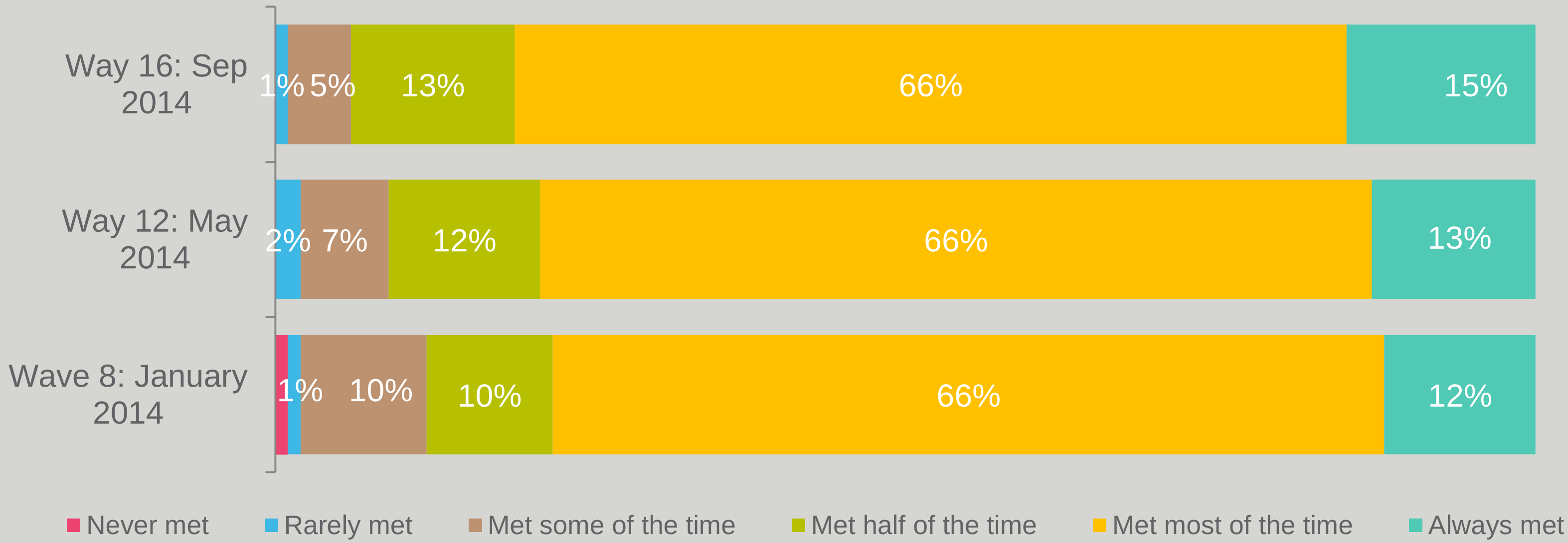
Freshness and Longevity

Expected to stay fresh for **8.5** days

▼ 7.9 days, Wave 8
▼ 8.2 days, Wave 12

⇛ Expectations of capsicum freshness have increased in wave 16, with those expectations being met more often.

Expectations Met



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> ?
Sample Wave 8, N=313, Wave 12, N=315 and Wave 16, N=309

colmar brunton.

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

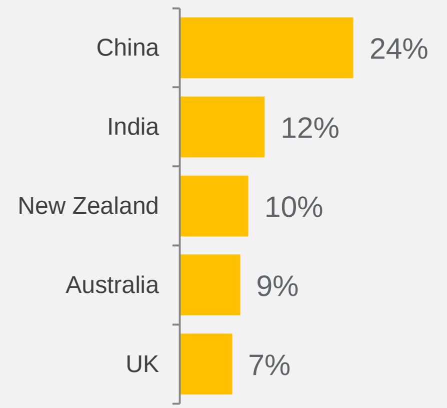
Trends: Capsicums

**Mintel search term was Capsicum*

Capsicum Global NPDs
July – September 2014

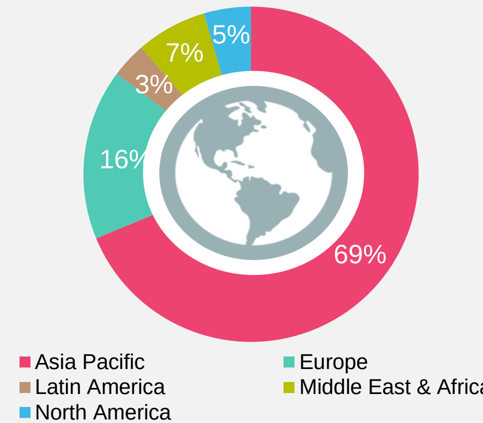
There were 176 products launched over the last three months that contained Capsicum as an ingredient. A large portion of these products were launched in China, India and New Zealand. New products were snacks, meals, sauces and processed products.

Country

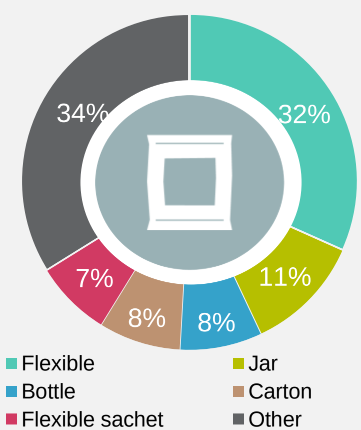


176 Global Launches

Region



Top Pack Formats



Categories

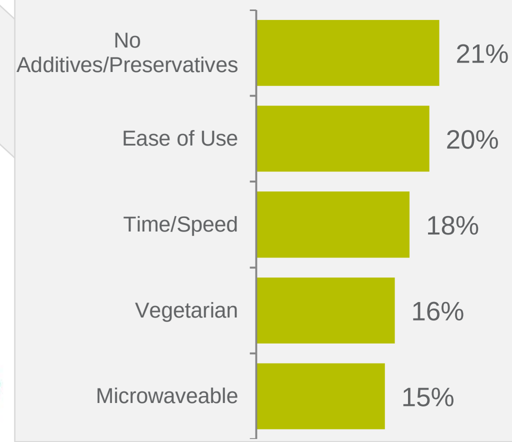
Snacks 24%

Meals 22%

Sauces 15%

Processed Products 7%

Top Claims



Capsicum Product Launches:
Last 3 Months (July – September 2014)
Summary

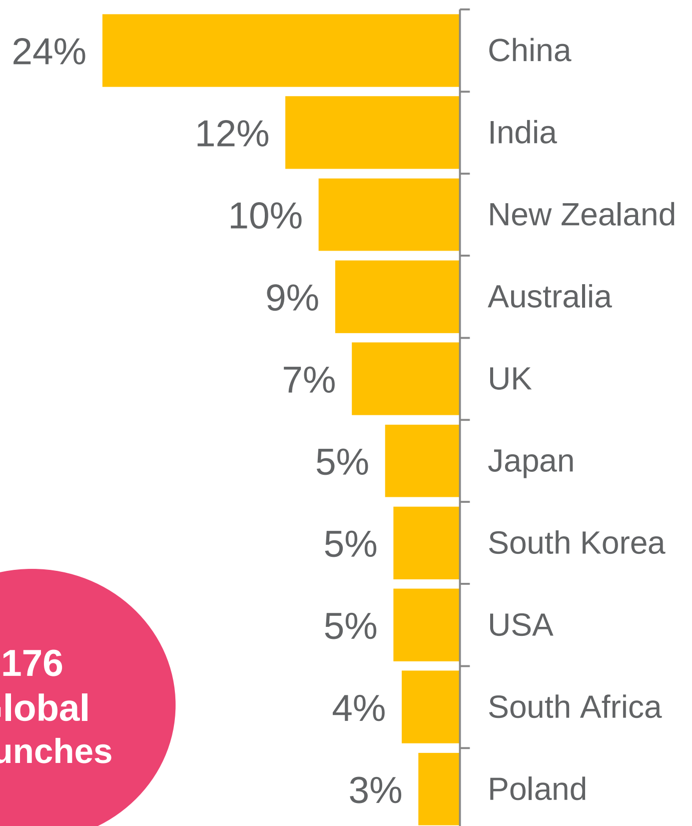
- There were 176 products launched globally in the last three months that contained capsicum as an ingredient.
- There were 16 products launched in Australia, which is a decrease from previous trends. Innovative launch can be found on the following slides.
- Top countries for launches were China (24%), India (12%) and New Zealand (11%), with over two thirds of products launched in the Asia Pacific region.
- Flexible pack format (32%) and jars (11%) were the most used packaging for products over the last three months, consistent with previous trends.
- Snacks (24%) were the main launch category for products containing capsicum. Meals (22%), sauces and seasonings (15%) also had a number of product launches.
- Product claims were around health; no additives/preservatives (21%) and vegetarian (16%) and convenience; ease of use (20%) and time/speed (18%).
- The most innovative product launch was a collagen lip-gloss released in Japan (examples of these can be found in the following pages).

Source: Mintel (2014)

Country & Categories Launches

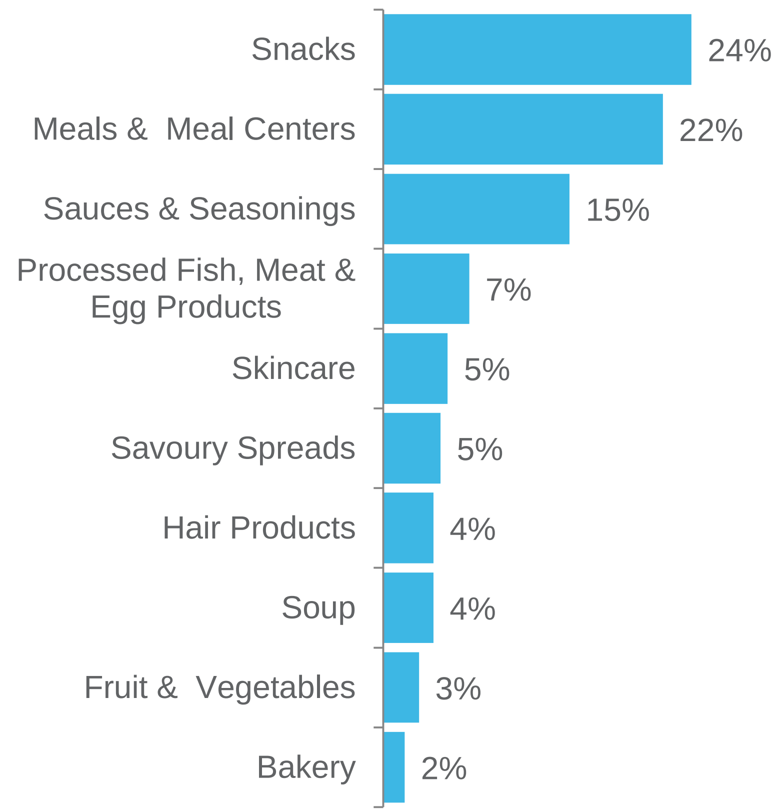
- China had the greatest number of capsicum product launches over the last 12 months. India and New Zealand also had a number of launches.
- Snacks and meals were the main product categories, similar to previous trends.

Top Launch Countries



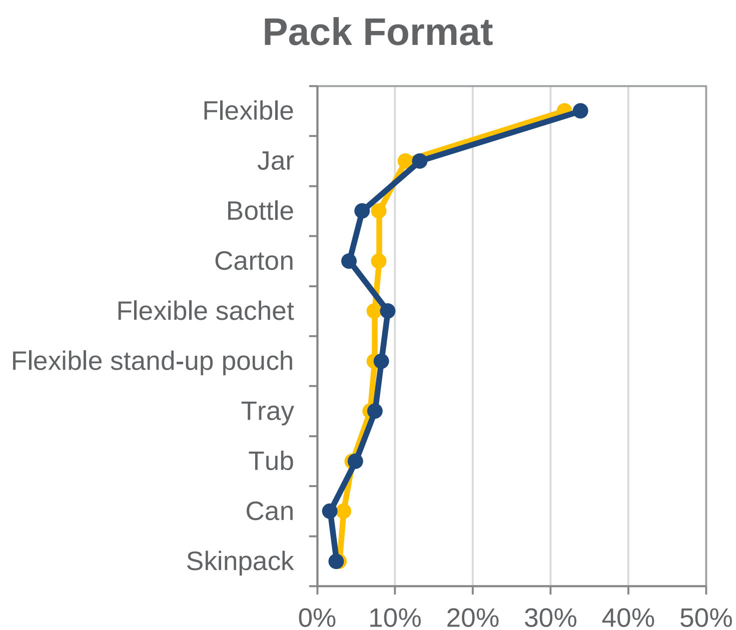
176 Global Launches

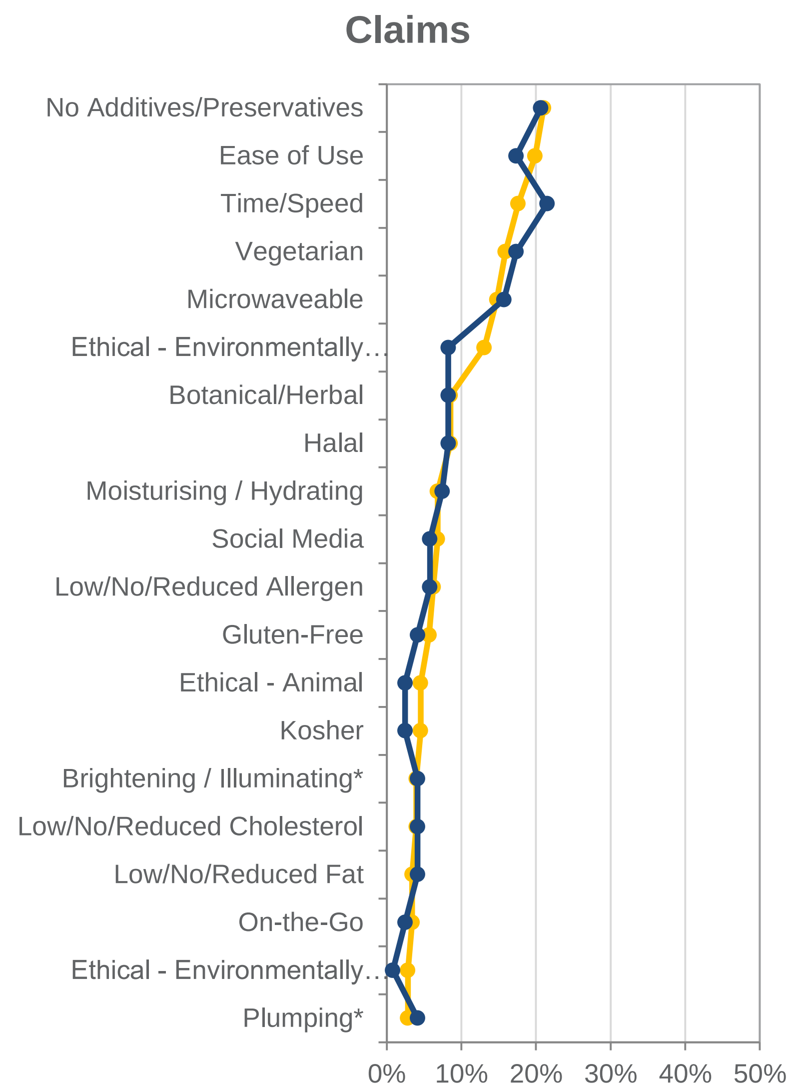
Top Launch Categories



Claims and Packaging Used

- Flexible packaging remained the most common format used. Jars and bottles were used to a lesser extent.
- Product claims were around health; no additives/preservatives and vegetarian and convenience; ease of use and time/speed.





Global N=176 Asia Pacific N=121

Only regions with n >30 are displayed

Innovative Capsicum Launches:
L3M (July – September 2014)

Marks & Spencer Global Escape Moroccan Escape (India)

The Marks & Spencer Global Escape Moroccan Escape range contains argan oil and features a bitter orange scent. It includes Rejuvenating Wonder Oil, which is claimed to provide skin and hair care benefits. Its formula features vitamin- and nutrient-rich, moisturising argan oil for natural nutrition.

Claims:
Botanical/Herbal, Brightening / Illuminating*, Ethical - Environmentally Friendly Package, Ethical - Animal, Moisturising / Hydrating

Anathoth Farm Sweet Chilli Relish (New Zealand)

Anathoth Farm Sweet Chilli Relish is naturally gluten free and is also free from added preservatives, colours or flavours. The product retails in a 420g pack.

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

Jimmy Dean Delights Pulled Pork Sandwich (USA)

Jimmy Dean Delights Pulled Sandwich comprises pulled pork in chipotle BBQ sauce on a pretzel roll. Two sandwiches contain 300 calories and 15g of protein. The fully cooked product is microwavable and retails in a recyclable 4.8-oz. pack, featuring the Sustainable Forestry Initiative logo.

Claims:
Ethical - Environmentally Friendly Package, Microwaveable

Fabindia Organics Spicy Salsa Sauce (India)

Fabindia Organics Spicy Salsa Sauce is now available in a redesigned 200g jar. The natural, vegetarian product is low in oil and contains no class II preservatives, synthetic colours or added flavours. The culinary sauce can be served with nachos or chips, or as a sandwich filling.

Claims:
No Additives/Preservatives, Vegetarian, Organic

Source: Mintel (2014)

Innovative Capsicum Launches:
L3M (July – September 2014)

Culley's Louisiana Habanero Hot Sauce (New Zealand)

Culley's Louisiana Habanero Hot Sauce is described as an award winning classic Louisiana style hot sauce. This medium hot sauce contains no gluten and is made with New Zealand grown chillies. It retails in a 150ml bottle.

Claims:
Gluten-Free, Low/No/Reduced Allergen

Dior Addict Transat Lip Maximizer Collagen Activ Lipgloss (Japan)

The Dior Transat colour collection has been launched for Spring 2014, and is inspired by Christian Dior's love for travel and the brand's spirit of timeless elegance and playfulness. The collection boasts classic, elegant shades contrasted by bold pops of colour.

Claims:
Botanical/Herbal, Seasonal, Time/Speed, Moisturising / Hydrating, Plumping*

Tiger Balm Pain Relieving Patch (USA)

Tiger Balm Pain Relieving Patch has been repackaged and now retails in a pack containing five patches, measuring 4-in. x 2.75-in. each. These long lasting flexible patches are formulated with an advanced hydrogel patch technology, and provide temporary pain relief and comfort for hours.

Claims:
Ease of Use, Other (Functional)

Coconut Town Spicy Lantern Capsicum Chilli Sauce (China)

Coconut Town Xiang La Deng Long La Jiao Jiang (Spicy Lantern Capsicum Chilli Sauce) is made with Hainan lantern capsicum chilli and is processed according to a modern technique. This product is said to be spicy and tasty, and retails in a 100g pack.

Claims:
N/A

Source: Mintel (2014)

Innovative Capsicum Launches:
L3M (July – September 2014)

The Good Taste Co. Black Label Capsicum, Coriander Hommus (New Zealand)

The Good Taste Co. Black Label Capsicum, Coriander & Traditional Hummus consists of three layers of hummus. The product retails in a 200g pack.

Claims:
N/A

Saeachim The Great Sweet Crispy Fried Chicken (South Korea)

Saeachim The Great Chicken Gangjeong (The Great Sweet Crispy Fried Chicken) can be conveniently enjoyed. This microwaveable product retails in a 650g pack.

Claims:
Ease of Use, Microwaveable

Yes to Tomatoes Combination Skin Daily Balancing Moisturiser (UK)

Yes to products are made with at least 95% natural and botanical ingredients to leave the skin 'positively glowing'. They are free from petroleum, SLS, phthalates and paraben.

Claims:
Vitamin/Mineral Fortified, Sulphate/Sulfate Free, Anti-Acne, Paraben Free, Cleansing*, Botanical/Herbal, Skin Disorders, Exfoliating, Anti-Bacterial, pH Neutral, Ethical - Animal, Ethical - Charity, Brightening / Illuminating*, Antioxidant, Time/Speed, Mattifying*,

Pico Red Pepper Jam (India)

Pico Red Pepper Jam has been repackaged. It features smoky and sweet flavours of roasted bell pepper, and is said to be an ideal accompaniment to cheese, crackers, French fries and chicken nuggets. The product is suitable for vegetarians, and retails in a 200g pack.

Claims:
Vegetarian

Source: Mintel (2014)

Australian Innovative Launches:
L3M (July – September 2014)

McCain Ultra Thin Crust Italiano Singles Pizzas

Imperial Grain Chicken Fried Rice

Lean Cuisine Chinese Dumpling Soup

Latina Fresh Spicy Chicken & Chorizo with Fusilli Pasta

Majans Smart Snacks Roast Capsicum & Feta Hummus Chips

Latina Fresh Fire Roasted Capsicum & Mozzarella Cappelletti

Aussie Kitchen Tomato, Roast Capsicum & Basil Soup

Woolworths Select Mexican Style Rice

Source: Mintel (2014)

In the Media.

General Vegetable News
(July – September 2014)

- In Australia approximately $10b worth of fresh food is thrown away each year. Between 20-40% of fresh fruit and vegetables do not meet retail standards and are rejected. A farmer in Queensland said that he knows a lot of farmers who send on their ‘shiny’ produce to the retailers and sell the rest at farmers markets, because the quality and taste are still high.
- A report looking at the Tasmanian fruit and vegetable industries has recommended doubling production by 2020. It suggested that new irrigation and demand from Asian markets will help drive increased production.
- Vegetable growers in NSW say that buying and selling local is good for profit margins. *"A lot of wholesalers are market driven with their prices, so as a result the farmer doesn't know what they're able to charge, or what they are able to get back from the markets."*

Source: www.abc.net.au/news

Commodity News
(July – September 2014)

- When shopping for Bok Choy consumers should look for white stalks, that are free from brown spots, bruising or scars. Leaves should be fresh and not limp.

  They should be refrigerated in a plastic bag and washed thoroughly before use.

  www.mercurynews.com

- Tesco re-launched the golden and striped varieties of beetroot in-store across the UK. These types of beetroots have a sweeter profile and thought to be more appealing and exciting to children, both in taste and appearance.

  The supermarket hopes this not only appeal to current consumers, but encourage a whole new generation of consumers.

  www.dailymail.co.uk

- Reports from the USA say sweetpotato sales and consumption are steadily on the rise. A local grower attributes the increase in sales to ‘nutritional and value-added halos’ including marketing the vegetable’s fiber, vitamin and mineral content

  www.thepacker.com

- McDonald’s restaurants are offering sweetpotato wedges for a limited time, served with garlic aioli.

  www.lifehacker.com.au

- When shopping for capsicums consumers should look for a firm skin that is free of wrinkles.

  To store capsicums, put them in a plastic bag and into the vegetable crisper. They will stay their freshest for up to one week.

  www.lacrossetribune.com

Thanks.