Monthly Tracker Report Wave 6: November 2013

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Background & Methodology

Background & Setting the Scene.

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

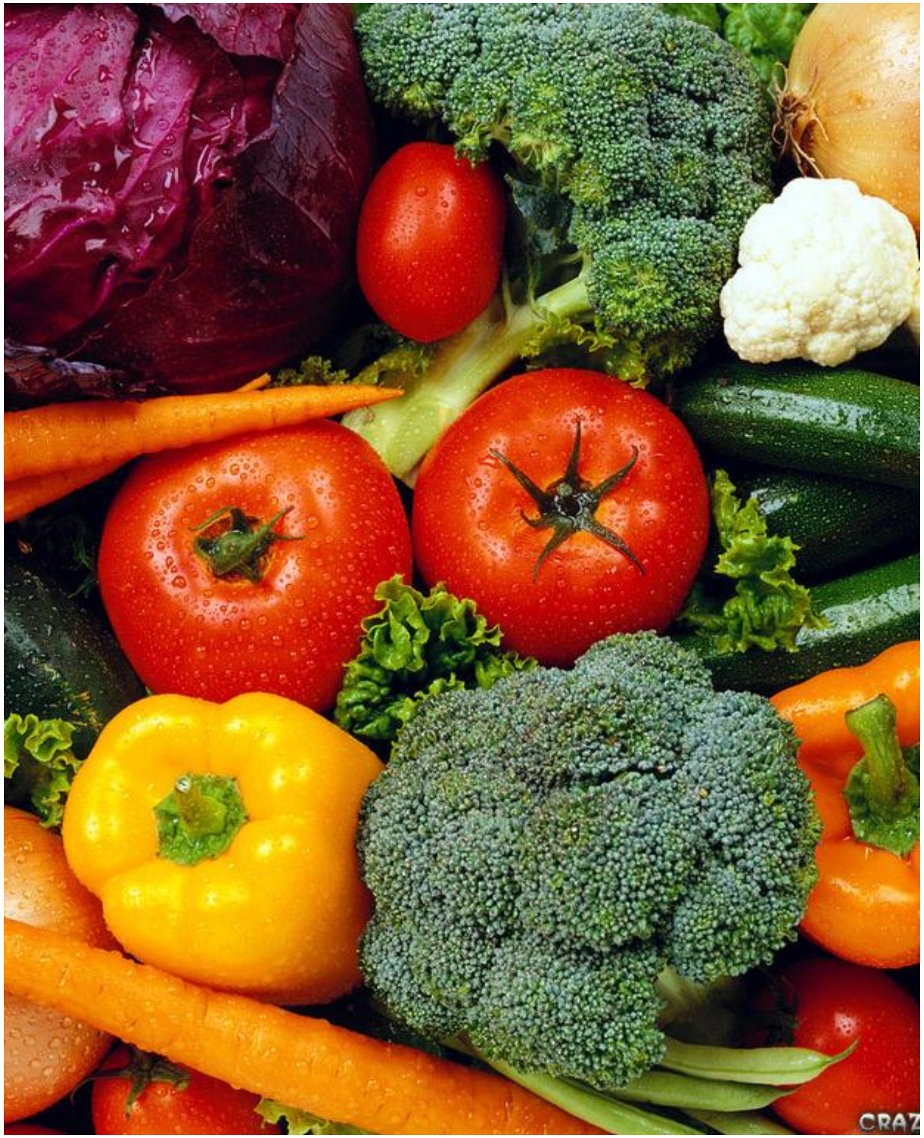
Colmar Brunton has been commissioned to conduct a monthly on-line tracking project following specified vegetables across a three year period; monthly trend analysis; and additional ad-hoc projects to assist in this understanding of consumers.

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

This wave's report (Wave 6, November 2013) focuses on:

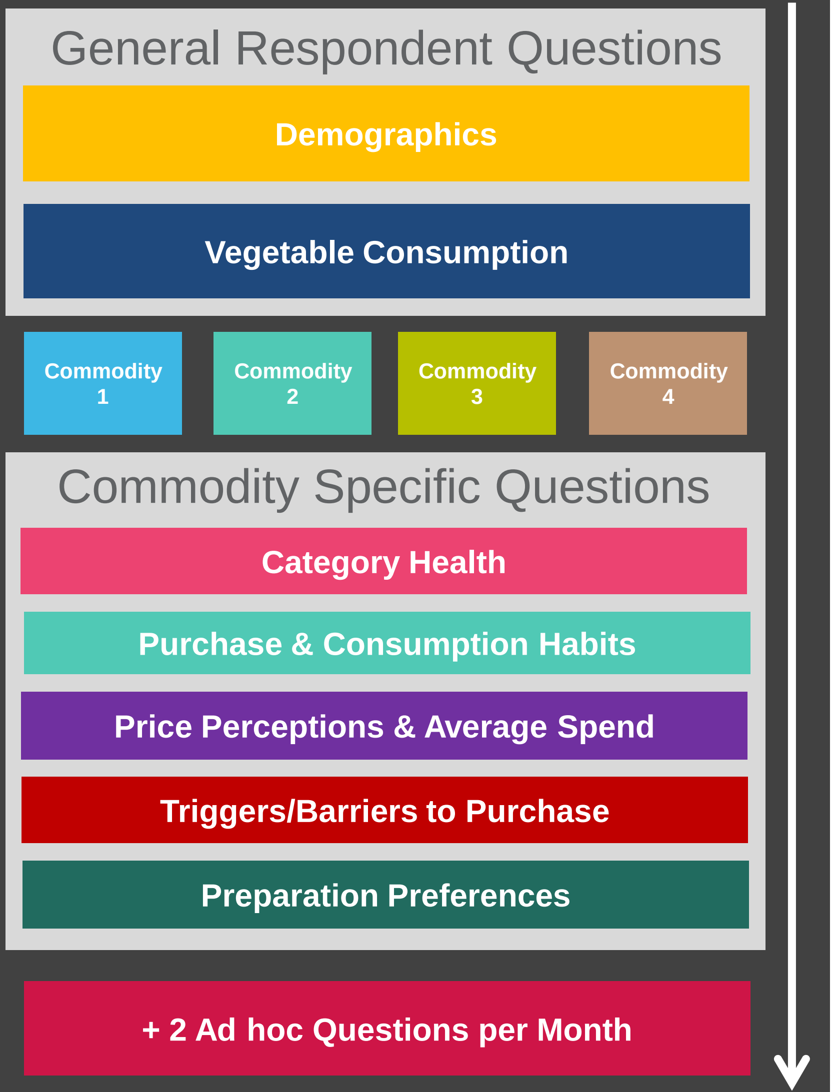
- Broccoli
- Green Peas
- Lettuce
- Sweet Corn

Essentially this is the second wave of tracking for these specific commodities, and as such, the current report will bring to light any change over the past four 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, 621 respondents completed the questionnaire. Respondents represented all States and Territories, as well as both metro and rural areas.

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

To qualify for the questionnaire, respondents...

⇛Were aged 18 years and over

⇛Purchased fresh vegetables at least once a month

⇛Purchased at least one of the monthly commodities (Broccoli, Green Peas, Lettuce and Sweet Corn) within the last month

⇛Were the main or joint grocery buyer

	Total N=621	Broccoli n=370	Green Peas n=339	Lettuce n=370	Sweet Corn n=324
Gender					
Male	N=224	N=114	N=128	N=115	N=116
Female	N=397	N=256	N=211	N=255	N=208
Age					
18-24 y.o.	N=33	N=20	N=19	N=20	N=14
25-34 y.o.	N=102	N=59	N=59	N=53	N=69
35-44 y.o.	N=90	N=58	N=46	N=48	N=53
45-54 y.o.	N=130	N=84	N=69	N=89	N=63
55-64 y.o.	N=132	N=77	N=69	N=81	N=66
65+ y.o.	N=134	N=72	N=77	N=79	N=59
Household					
Single Income no Kids	N=125	N=70	N=73	N=64	N=55
Double Income no kids	N=105	N=59	N=58	N=64	N=56
Young Families	N=91	N=58	N=42	N=54	N=63
Established Families	N=137	N=83	N=72	N=82	N=79
Empty Nesters	N=163	N=100	N=94	N=106	N=71
Location					
New South Wales	N=119	N=60	N=71	N=61	N=75
Victoria	N=100	N=62	N=58	N=55	N=48
South Australia	N=92	N=53	N=55	N=56	N=45
Queensland	N=100	N=59	N=47	N=58	N=55
Western Australia	N=102	N=75	N=56	N=75	N=55
Tasmania	N=78	N=48	N=38	N=48	N=29
Australian Capital Territory	N=26	N=11	N=12	N=15	N=15
Northern Territory	N=4	N=2	N=2	N=2	N=2

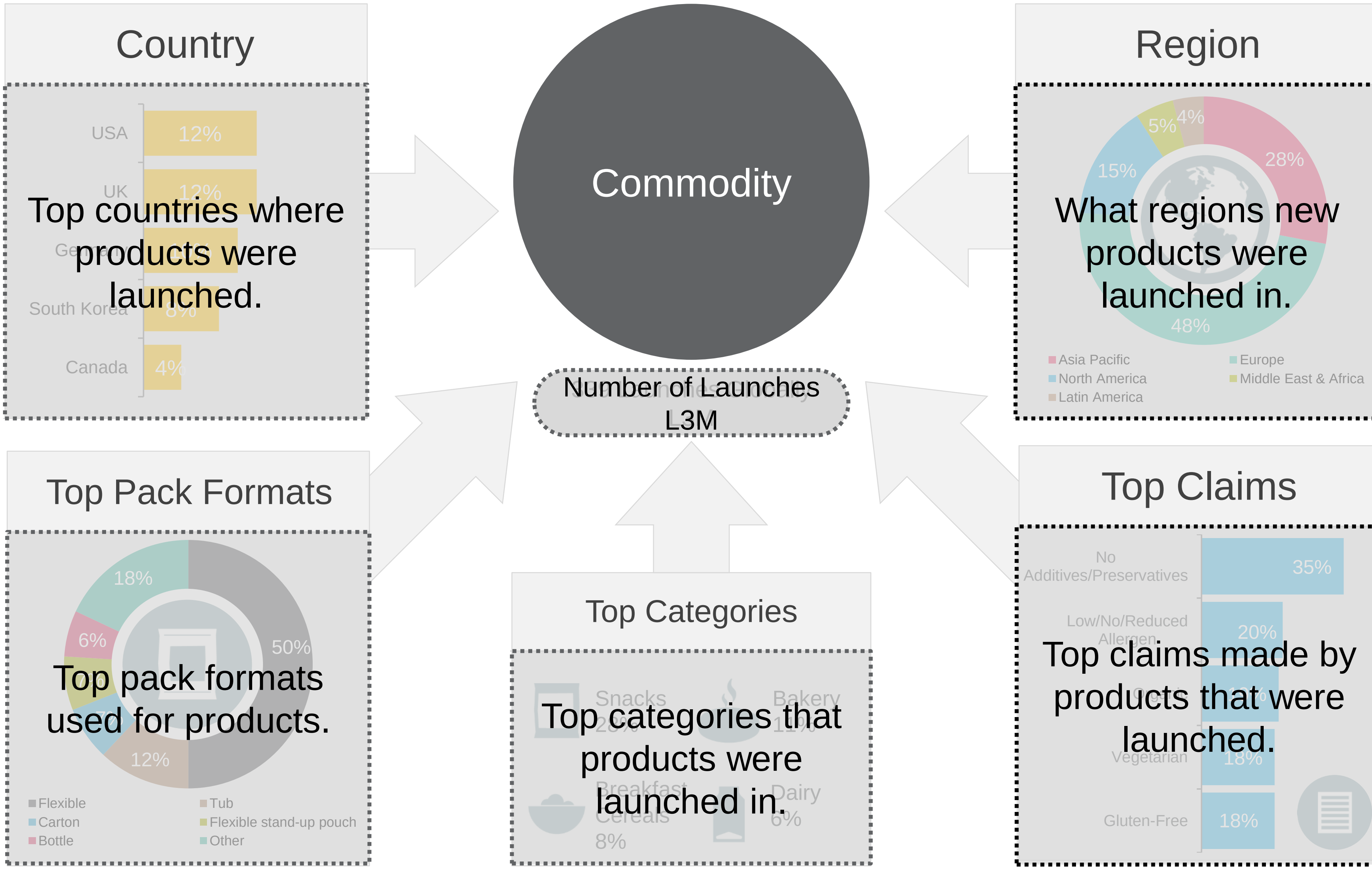
Trends Research: Our Approach

- 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 6:
Executive Summary

Broccoli Grower Action Plan

14%

Consumers indicated a strong future purchase intent of Broccoli

1.

Insight:

Health was the main driver of future broccoli purchase.

Recommendation:

Use point of sale information to further highlight health benefits of broccoli.

2.

Insight:

Expected freshness of broccoli had decreased since Wave 2.

Recommendation:

Provide consumers with optimal storage instruction, taking into consideration seasonality (as we enter warmer months).

3.

Insight:

Global trends indicate convenience claims (ie microwavable), whereas domestically, Broccoli primarily used for dinner consumption occasions.

Recommendation:

Promote ease of use and other cooking styles, such as microwavable to increase consumption occasions.

Green Peas Grower Action Plan

22% The main barrier to purchase was expense

1.

Insight:

Provenance remains relatively important to consumers.

Recommendation:

Include labelling of provenance (preferably state or national level), which would help substantiate retail price to consumers.

2.

Insight:

Taste and health were key triggers to future purchase.

Recommendation:

Provide information of specific health benefits at point of sale to promote purchase and further validate price.

3.

Insight:

A trend towards increased purchase and consumption frequency.

Recommendation:

To continue growth of consumption occasions provide information on alternative recipes and cuisines to increase peas in cooking repertoire.

Lettuce Grower Action Plan

27% Short shelf life the main barrier to future purchase

1.

Insight:

Trend indicated a decrease in longevity of freshness compared with Wave 2.

Recommendation:

Promote correct storage of lettuce to both retailers and consumers, in order to increase shelf life and freshness.

2.

Insight:

Lettuce was primarily used in Australian cuisine.

Recommendation:

Inform consumers of alternative cuisines and recipes that utilise lettuce, particularly in cooler months when salads are consumed less often.

3.

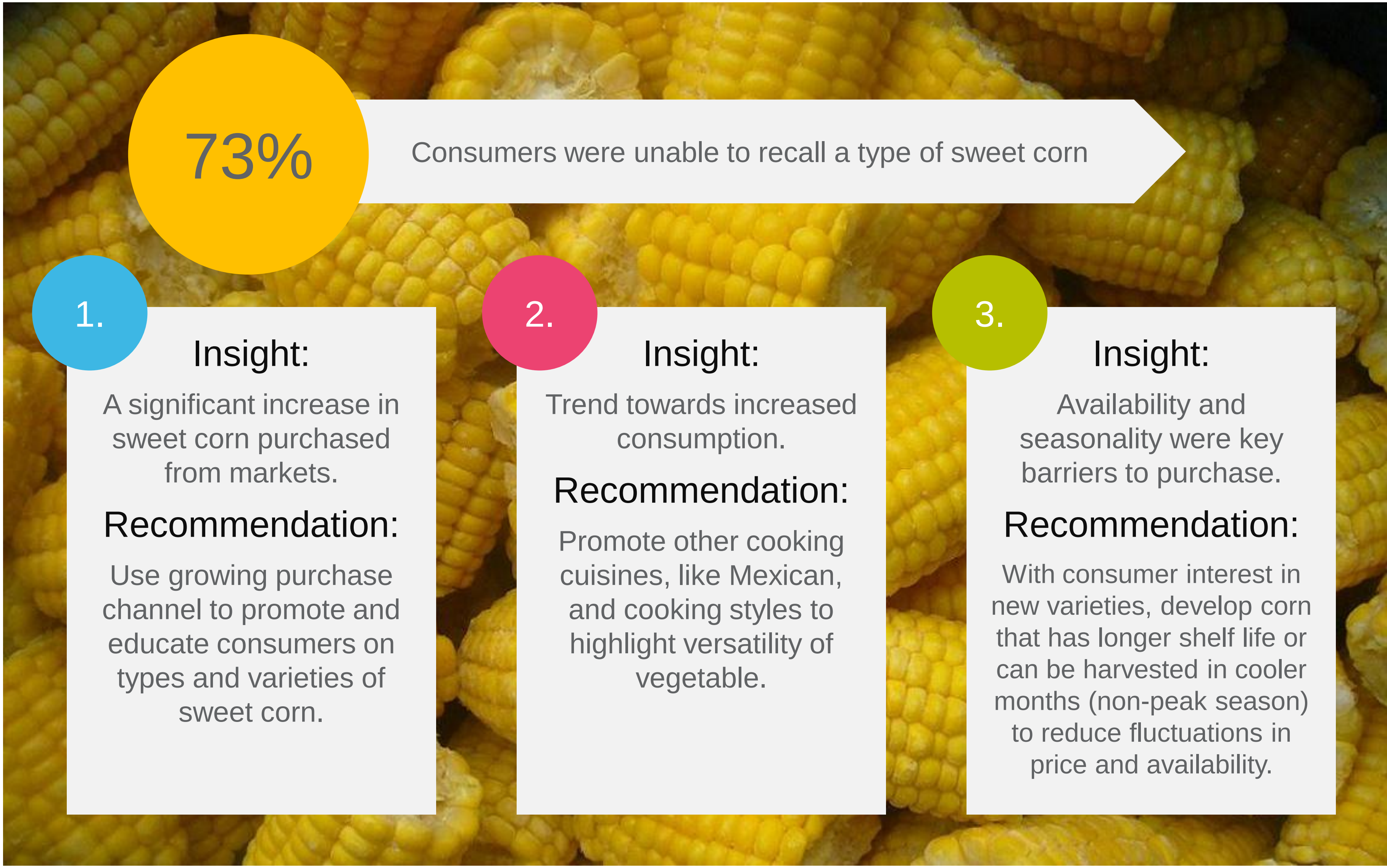
Insight:

Decreased purchase of pre-packaged and bagged lettuce.

Recommendation:

Coming into warmer months, promote greater awareness of used by dates and longevity of freshness on packaged lettuce.

Sweet Corn Grower Action Plan



73% Consumers were unable to recall a type of sweet corn

1.

Insight:

A significant increase in sweet corn purchased from markets.

Recommendation:

Use growing purchase channel to promote and educate consumers on types and varieties of sweet corn.

2.

Insight:

Trend towards increased consumption.

Recommendation:

Promote other cooking cuisines, like Mexican, and cooking styles to highlight versatility of vegetable.

3.

Insight:

Availability and seasonality were key barriers to purchase.

Recommendation:

With consumer interest in new varieties, develop corn that has longer shelf life or can be harvested in cooler months (non-peak season) to reduce fluctuations in price and availability.

Wave 2: Fact Base
(1 of 2)

Broccoli:

- Key comparisons with Wave 2 were an increase in purchase from specialist retailers. There was a decrease in individual broccoli purchase. Expense was significantly less of a barrier to future purchase compared with Wave 2.
- There was strong future purchase intent for broccoli.
- Purchase of broccoli occurred on average 4.3 times per month and consumed 9.9 times.
- Average recalled last spend was $3.43 and overall, broccoli was perceived to be good value (6.3/10).
- Overall awareness of broccoli types remained low, with 59% of respondents unable to recall a variety.
- The key triggers to purchase were health and nutrition, whereas expense was an increased barrier to future purchase.
- Broccoli was primarily used in Australian and Chinese cuisine and used throughout weekly dinners.

Green Peas:

- Compared with Wave 2, purchase of green peas were more likely to be purchased from independent retailers. There was a decrease in purchase of individual peas and small trays of peas. Since July, the average price per kg of green peas had risen by $2.29.
- Green peas had high future purchase intent, importance and interest in new varieties to consumers.
- Average retail prices for green peas was $14.52per kg, higher than July. This was reflected in an elevated consumer’s recalled last spend ($4.35).
- Half of respondents were unable to recall a variety of green peas. Of those that could, snow peas and snap peas had the greatest awareness (30% and 21%, respectively).
- Taste and convenience were the main triggers to future purchase.
- Provenance was found to be of relatively high importance to consumers.
- Consumers expected green peas to remain fresh for over 9 days. 80% of respondents indicated this freshness was met at least most of the time.

Wave 2: Fact Base
(2 of 2)

Lettuce:

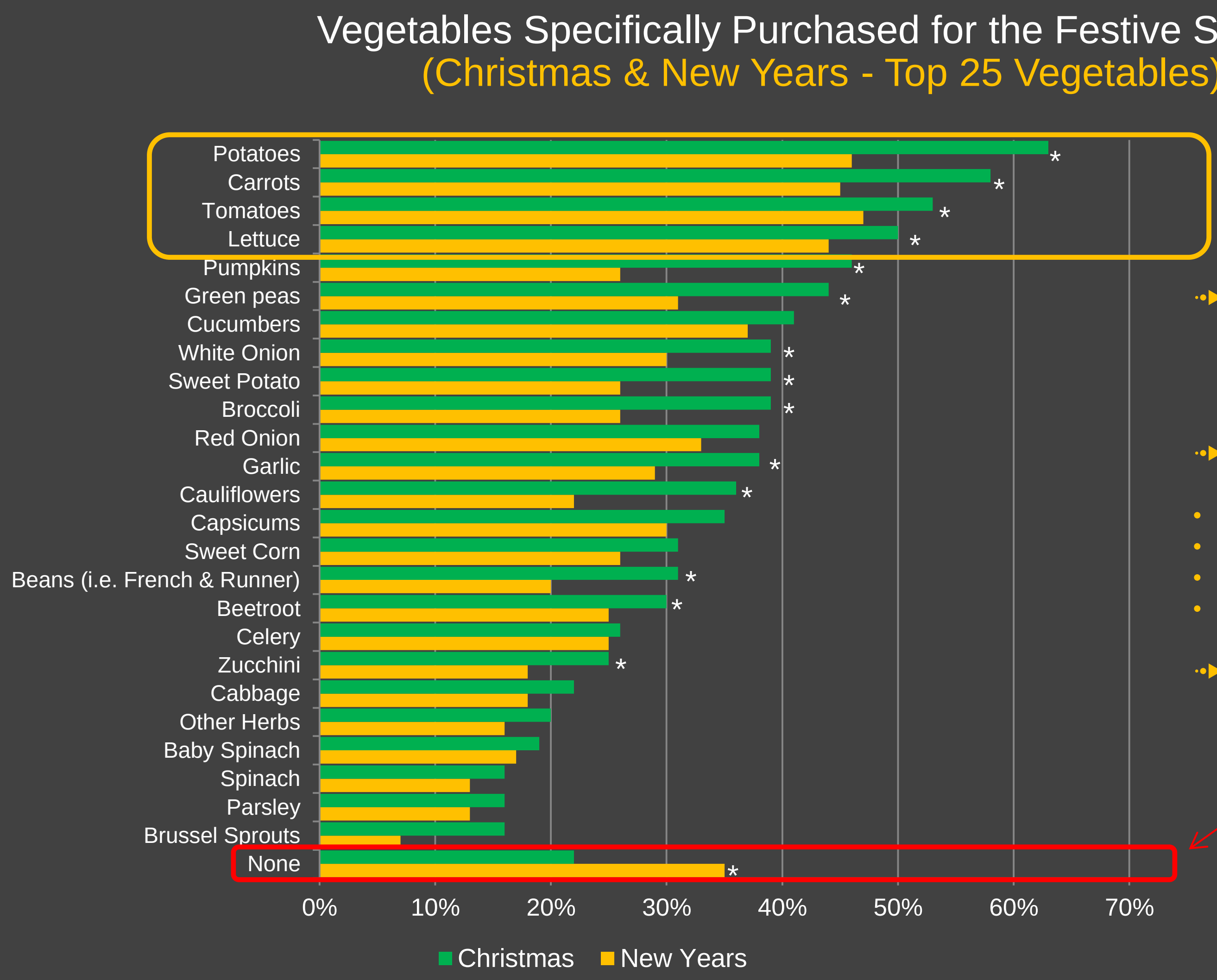
- Compared with Wave 2, consumption frequency was significantly higher (14.7 times per month). Consumers were less likely to purchase lettuce from Aldi. Cos lettuce had the greatest spontaneous recall of lettuce types, followed by Iceberg. Lettuce was more likely to be served with cucumbers, which may reflect seasonality.
- Consumers purchased lettuce on average 4.9 times per month. Mainstream retail channels remained the most common location for purchase.
- Whole lettuce was the most common format purchased (81%). On average, price per unit was $2.56 for iceberg lettuce.
- Health and taste were key triggers to future purchase. The main barrier to purchase was lettuce’s short shelf life.
- Australian (traditional and modern) was the main cooking cuisine.
- Consumers expected lettuce to remain fresh for one week, 72% indicated that these expectations were met at least most of the time.

Sweet Corn:

- Consumer behaviour and perceptions were relatively consistent between Waves 2 and 6. Significant differences were noted with an increase in purchase of sweet corn from markets. There was also a perceived decrease in expense as a barrier to purchase, which is likely due to seasonality of corn.
- Those that purchase sweet corn did so on average 3.6 times per month and were consumed on average 6.5 times per month.
- Individual sweet corn was the primary purchase format, which on average sold for $1.23 per cob.
- Awareness of corn varieties remained very low, with 73% of consumers unable to recall a type
- Top divers of purchase were taste, with an increased convenience factor also driving purchase.
- On average consumers expect sweet corn to stay fresh for over a week.
- Sweet corn was expected to stay fresh for over a week.

Wave 2:
Ad-Hoc Questions

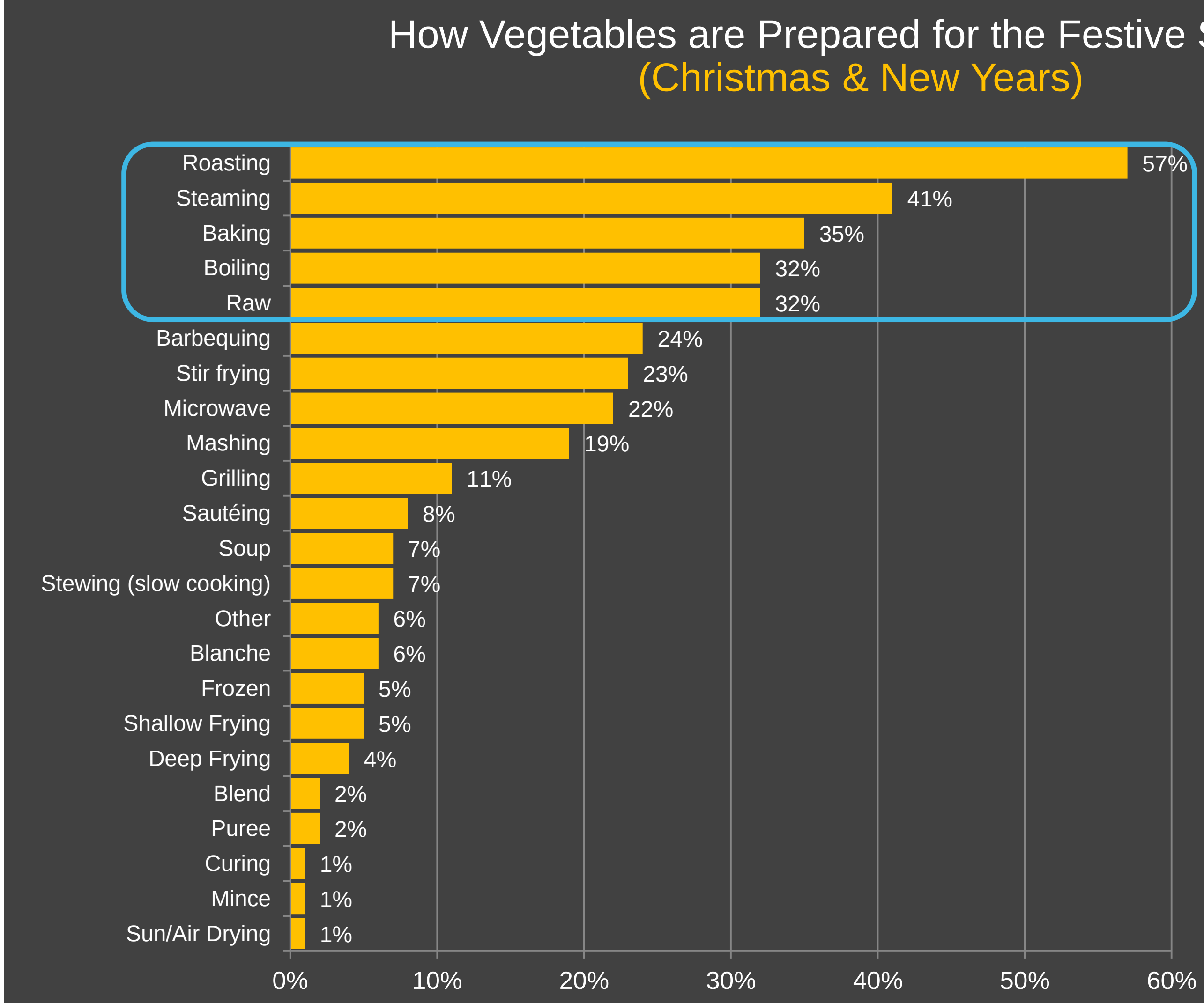
Additional Monthly Questions Asked:



- Consumer's purchased more vegetables for Christmas celebrations than they would for New Years.
- The top 4 vegetables purchased for Christmas & New Years were:
  - Potatoes
  - Carrots
  - Tomatoes
  - Lettuce
- Significantly more respondents **do not** purchase vegetables for New Years compared to Christmas.

AH1. What vegetables do you specifically purchase for the festive season (e.g. Christmas and New Year's)?
Total Respondents N=621 (* indicates significantly higher score @95%CI)

Additional Monthly Questions Asked:

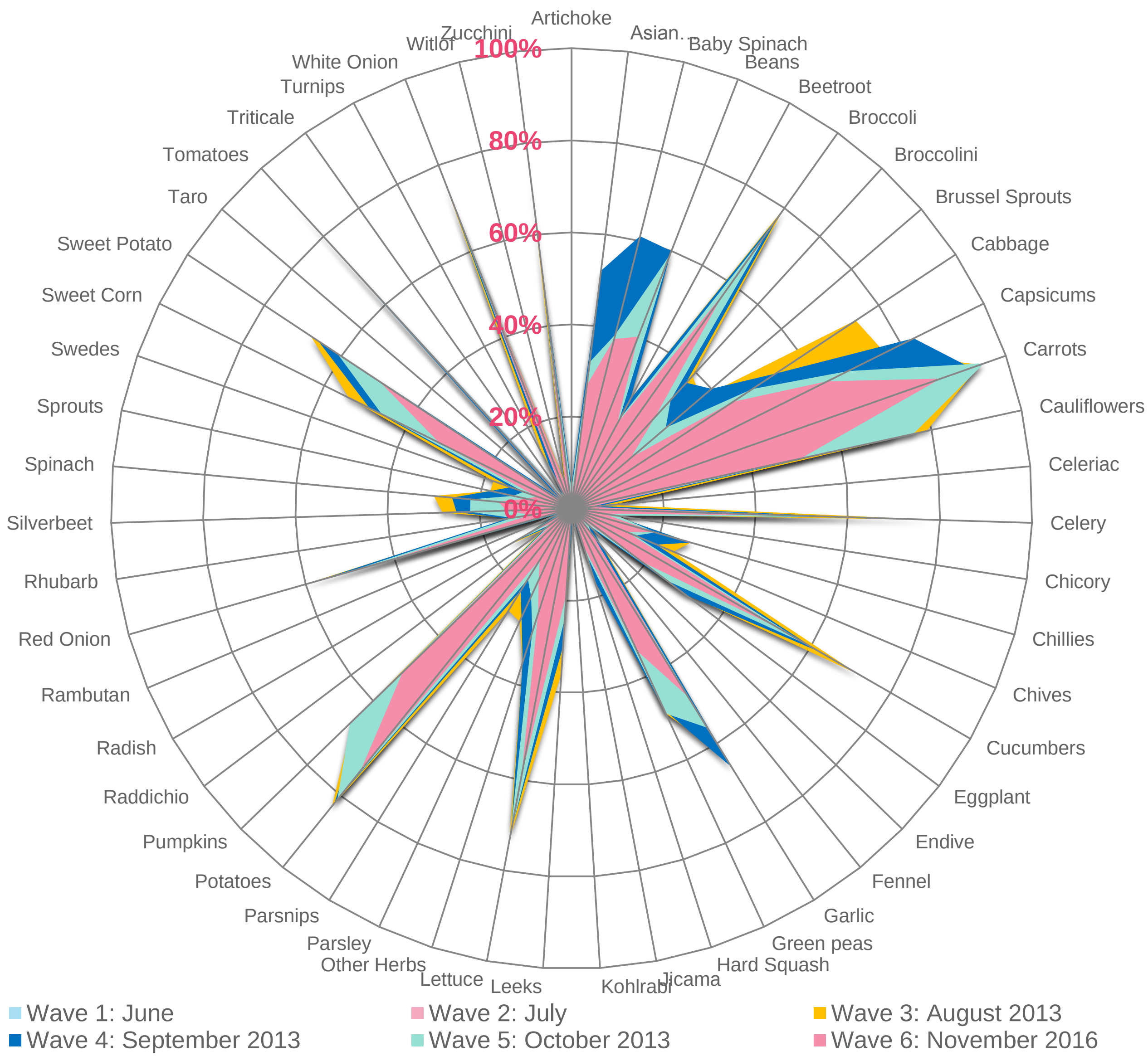


Roasting, steaming, baking, boiling & raw are the most popular methods of cooking and preparing vegetables for the festive season (Christmas & New Years)

AH2. And how do you generally cook vegetables for the festive season (Christmas & New Year's)?
Total Respondents N=621 (* indicates significantly higher score @95%CI

Wave 2: Overall Vegetable Tracking

Vegetables Purchased Last Month



- Of the 6 waves, November respondents had the lowest overall purchase of fresh vegetable varieties, across the majority of commodities evaluated.
- The biggest decrease in vegetable purchase were baby spinach, garlic and sweet potato.
- Reduction in purchase may be due to seasonality and entering warmer months.

Total Sample N=1402 Wave 6
S8. Which of the following fresh vegetables have you purchased in the last month?

Category Health Explained

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

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

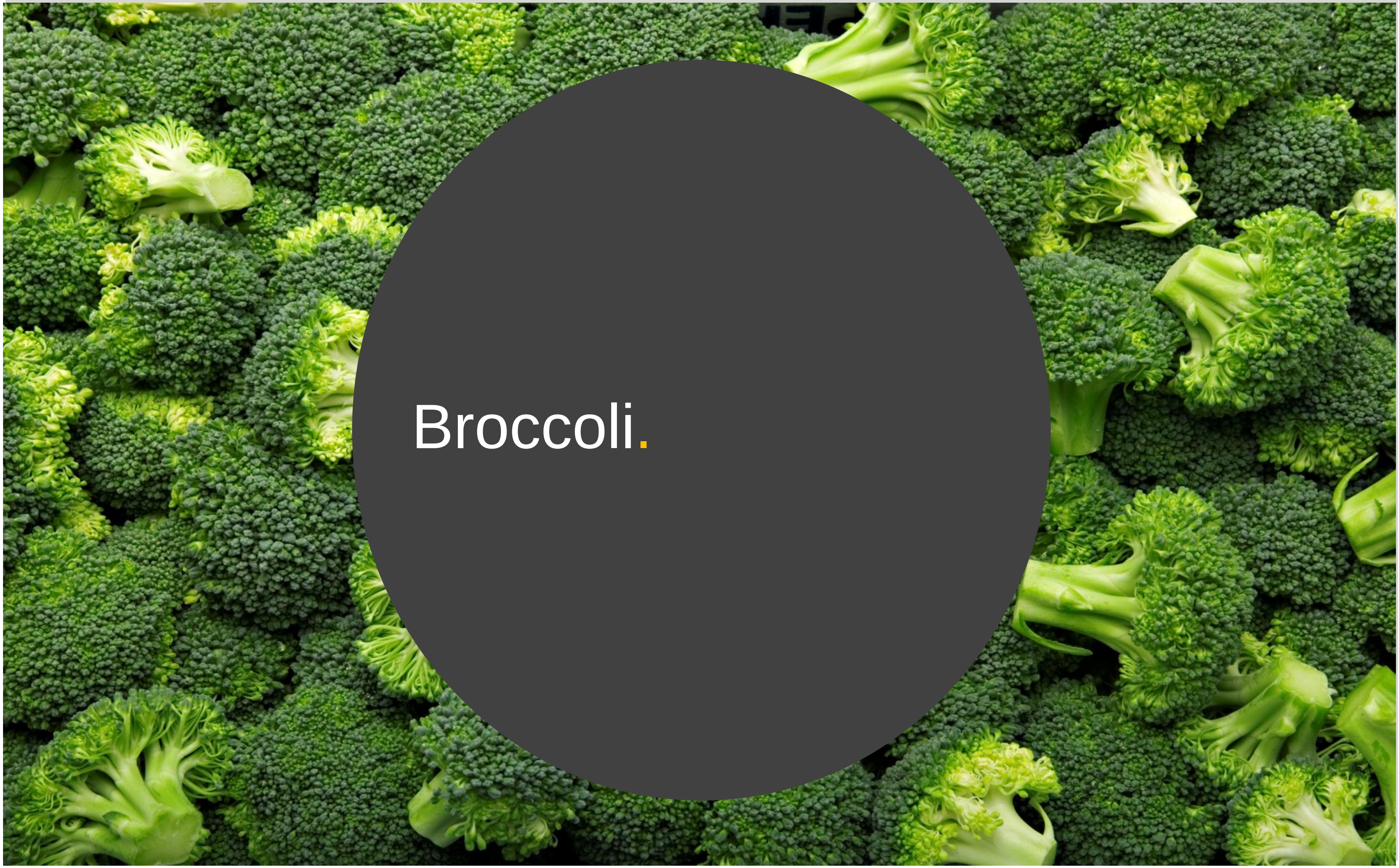
- How **important** to you is having a range of *commodity* available in the store where you usually shop?
- How **satisfied** or dissatisfied are you with the range of *commodity* currently available?
- How likely would you be to **recommend** *commodity* to your family and friends?
- How interested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

Category Health

- All commodities of focus were regarded as important to consumers.
- Green peas were particularly important, and equal to the most important as recorded thus far (Asian Vegetables). This reflects their broad appeal, versatility and uniqueness.
- Respondents were less interested in new varieties of broccoli than they were for varieties of other vegetables suggesting a need for inspiration within this category.

	Broccoli	Green Peas	Lettuce	Sweet Corn	Harvest Total Mean
Importance	6.3	7.3	6.9	6.6	6.3
Satisfaction	6.8	6.7	6.9	6.7	6.7
Endorsement	7.1	7.0	6.8	7.1	6.8
Interest (New Varieties)	5.9	6.7	6.3	6.3	6.2
Future Purchase					
More	14%	15%	14%	16%	13%
Same	85%	83%	84%	82%	85%
Less	2%	2%	2%	2%	2%

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


Broccoli.

Purchase and Consumption Behaviour

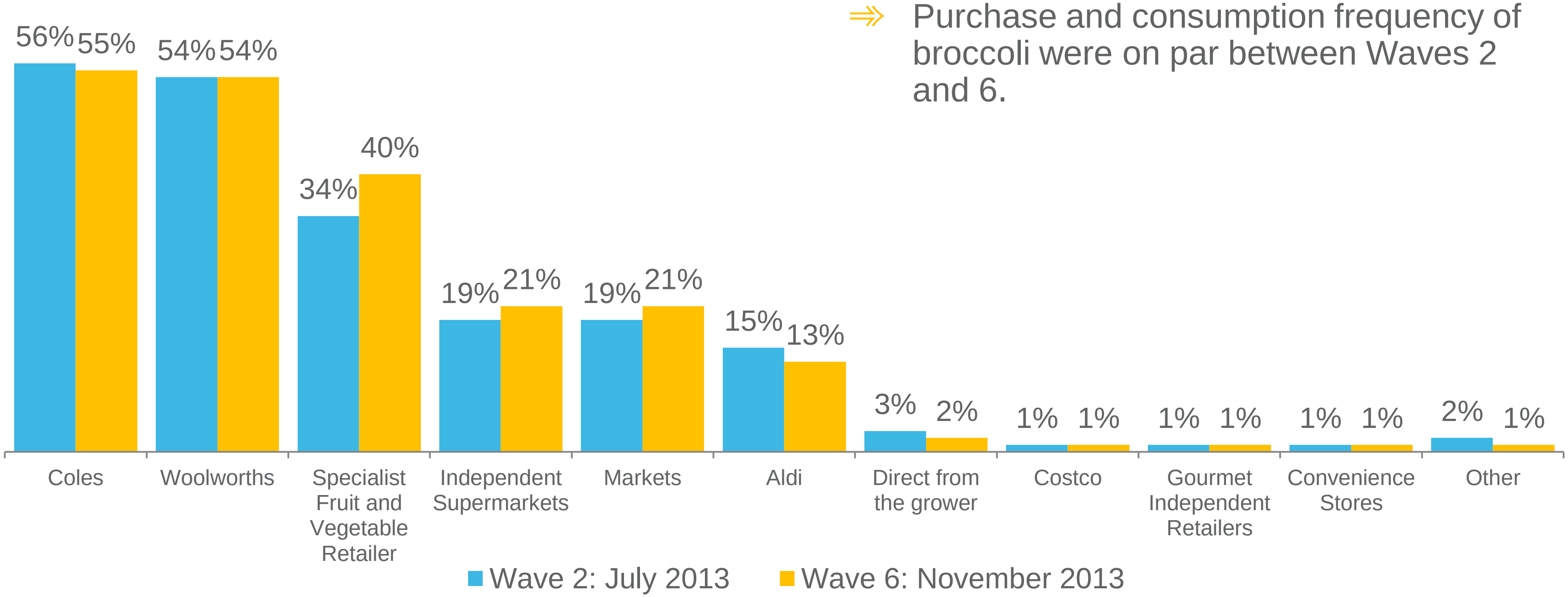
Broccoli

Average Purchase
4.3 times per month
(cf. **4.2** times per month Wave 2)

Average Consumption
9.9 times per month
(cf. **10.0** times per month Wave 2)

- Mainstream retail channels (Coles and Woolworths) continued to be the main source of broccoli purchases.
- There was a 6% increase in respondents who were purchasing broccoli through specialist fruit and vegetable retailers and market purchases were also up 2% compared with Wave 2.
- Purchase and consumption frequency of broccoli were on par between Waves 2 and 6.

Purchase Channels



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

Average Spend & Price Sensitivity

Broccoli

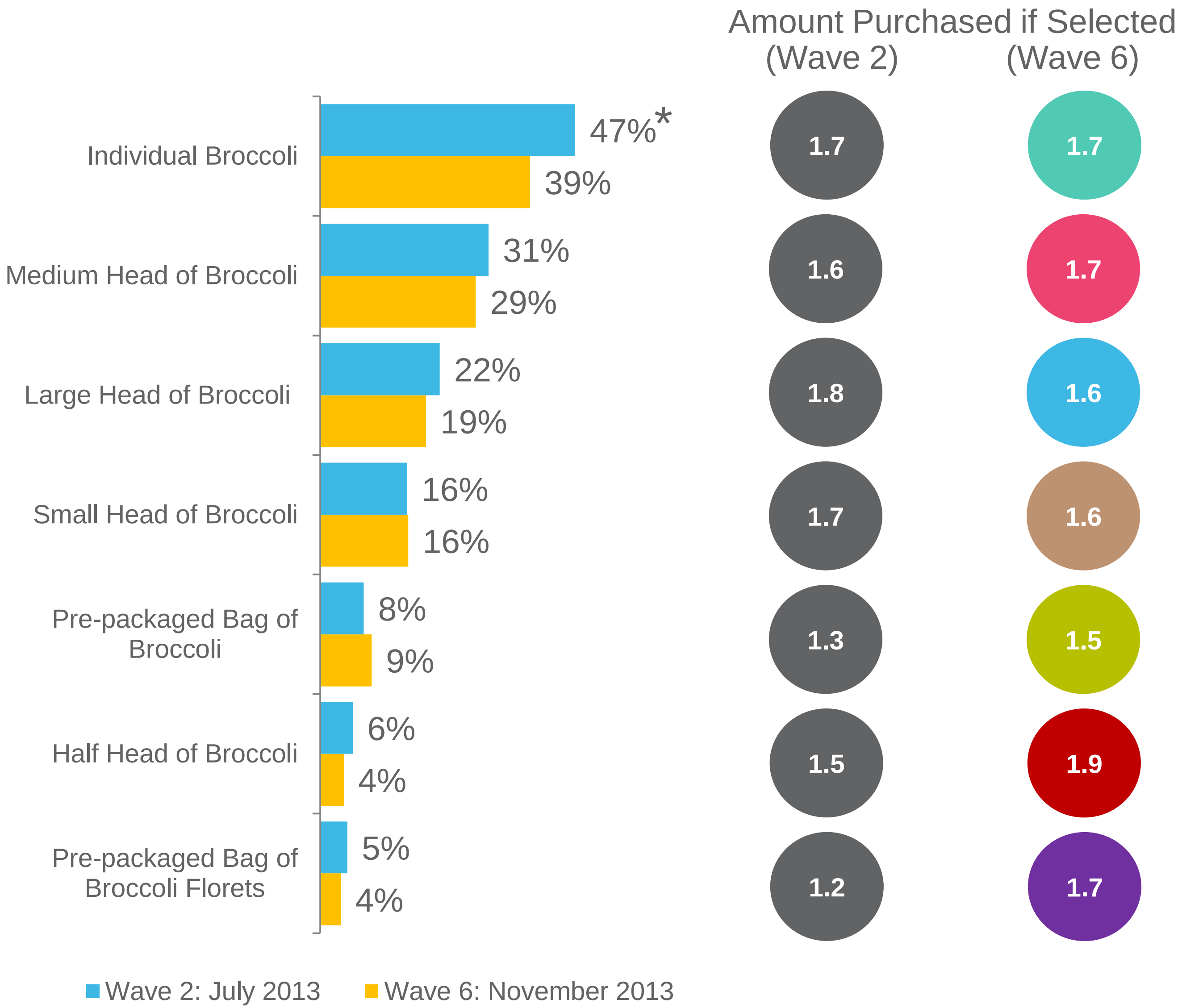
⇛ The average consumer typically purchased **700g** of Broccoli in November, the same amount as July.

⇛ The average recalled last spend was **$3.43** in November, slightly lower than July ($3.55).

⇛ On average, consumers perceived Broccoli to be good value **(6.3/10)** in November.

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

Pack Formats Purchased
Broccoli



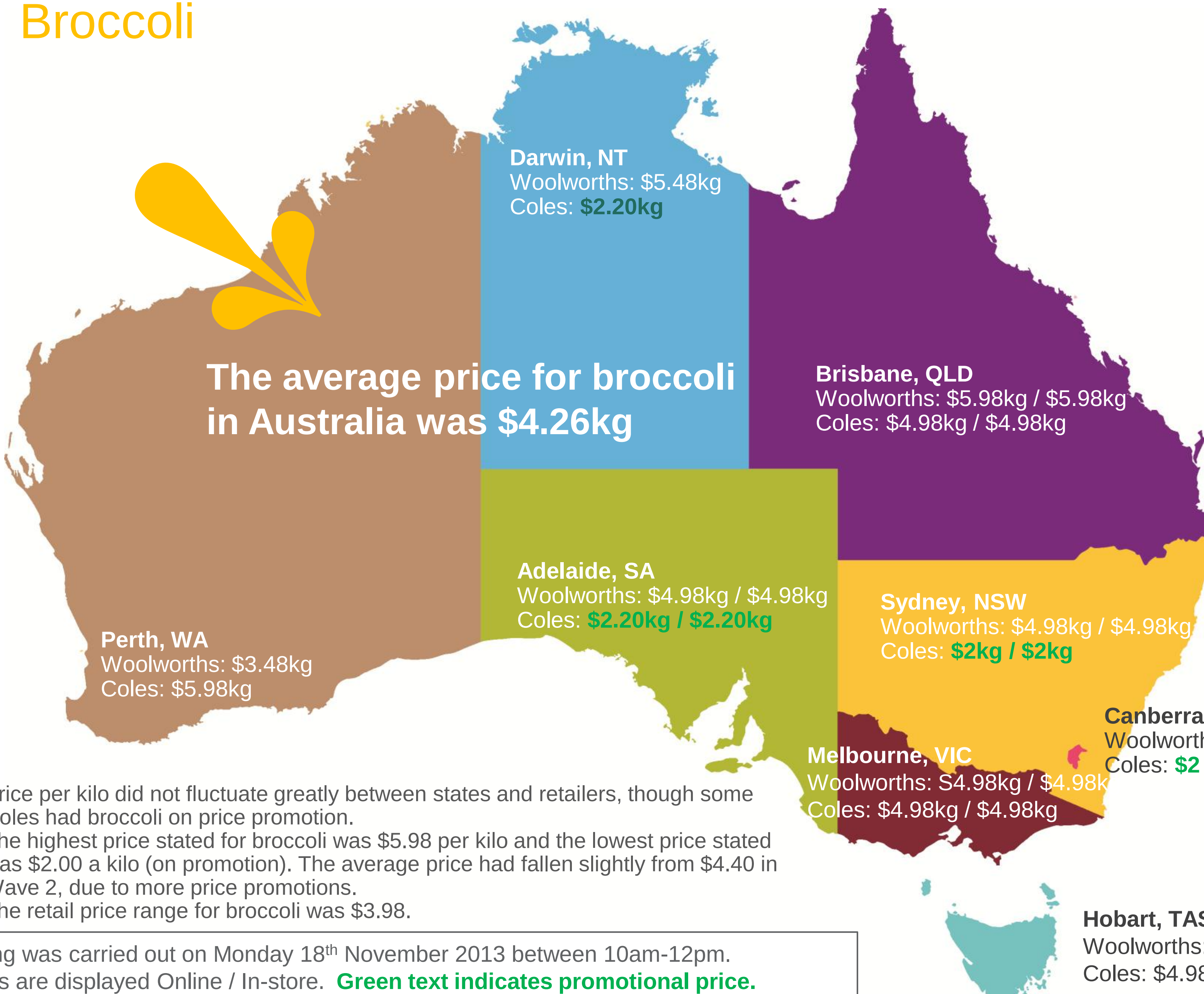
- The purchase of individual units of broccoli was significantly higher compared with July and remains the most common format purchased.
- There was a trend toward increase number of half head of broccoli and bags of broccoli florets. Other broccoli formats purchased were on trend with Wave 2.

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

colmar brunton.

Online and In-store Commodity Prices

Broccoli

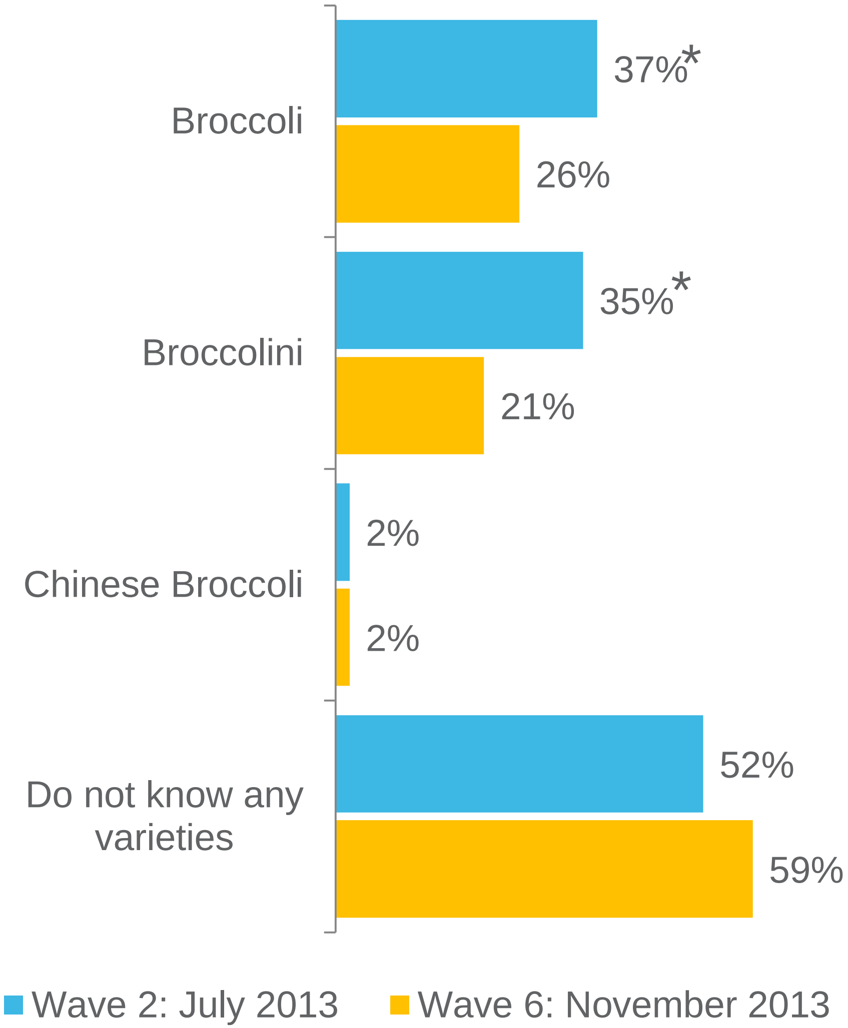


- Price per kilo did not fluctuate greatly between states and retailers, though some Coles had broccoli on price promotion.
- The highest price stated for broccoli was $5.98 per kilo and the lowest price stated was $2.00 a kilo (on promotion). The average price had fallen slightly from $4.40 in Wave 2, due to more price promotions.
- The retail price range for broccoli was $3.98.

Pricing was carried out on Monday 18th November 2013 between 10am-12pm.
Prices are displayed Online / In-store. **Green text indicates promotional price.**

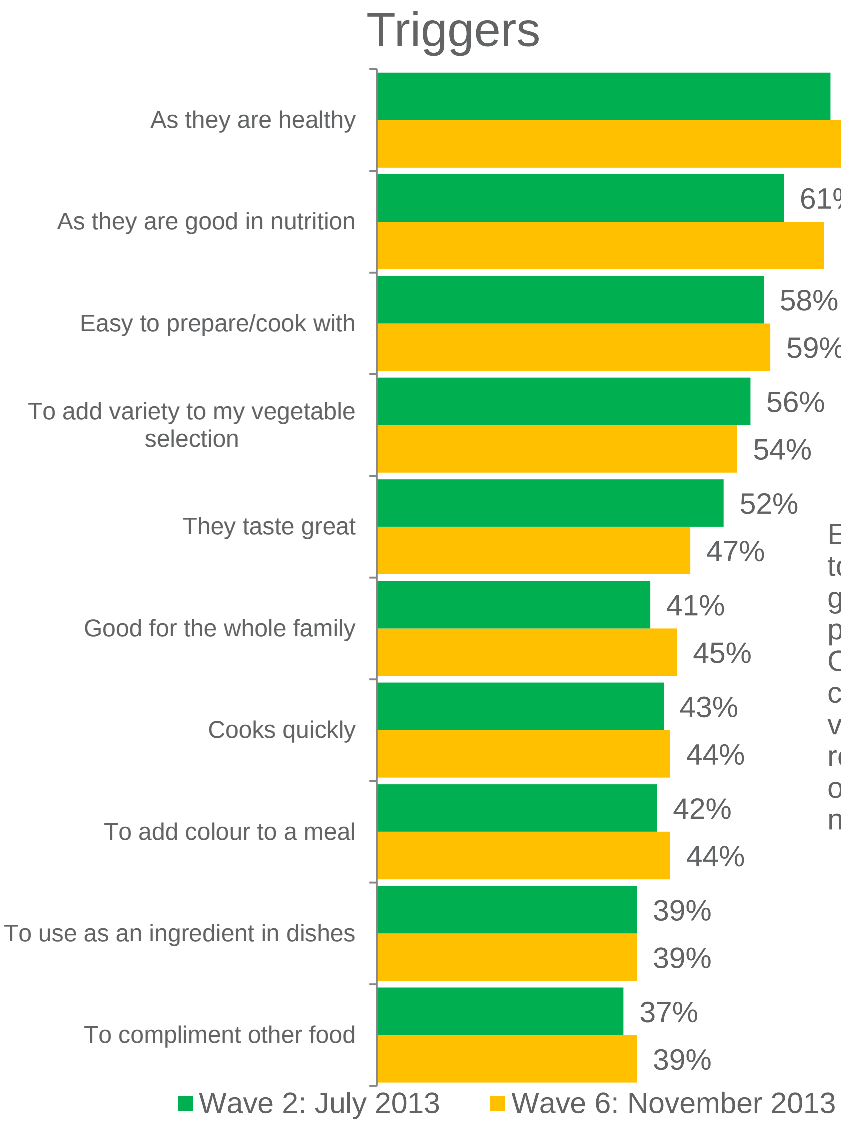
Spontaneous Varietal Awareness & Purchase
Broccoli

- Recall of varieties was low, with significantly less respondents identifying ‘Broccoli’ and ‘Broccolini’.
- There was still a high level of misattribution for broccolini as a type of broccoli.
- As the majority of consumers don’t know any specific varieties, this spells opportunity to engage consumers more in the category. When a higher level of awareness around new varieties and their different sensory attributes occurs, interest in new varieties should similarly increase.



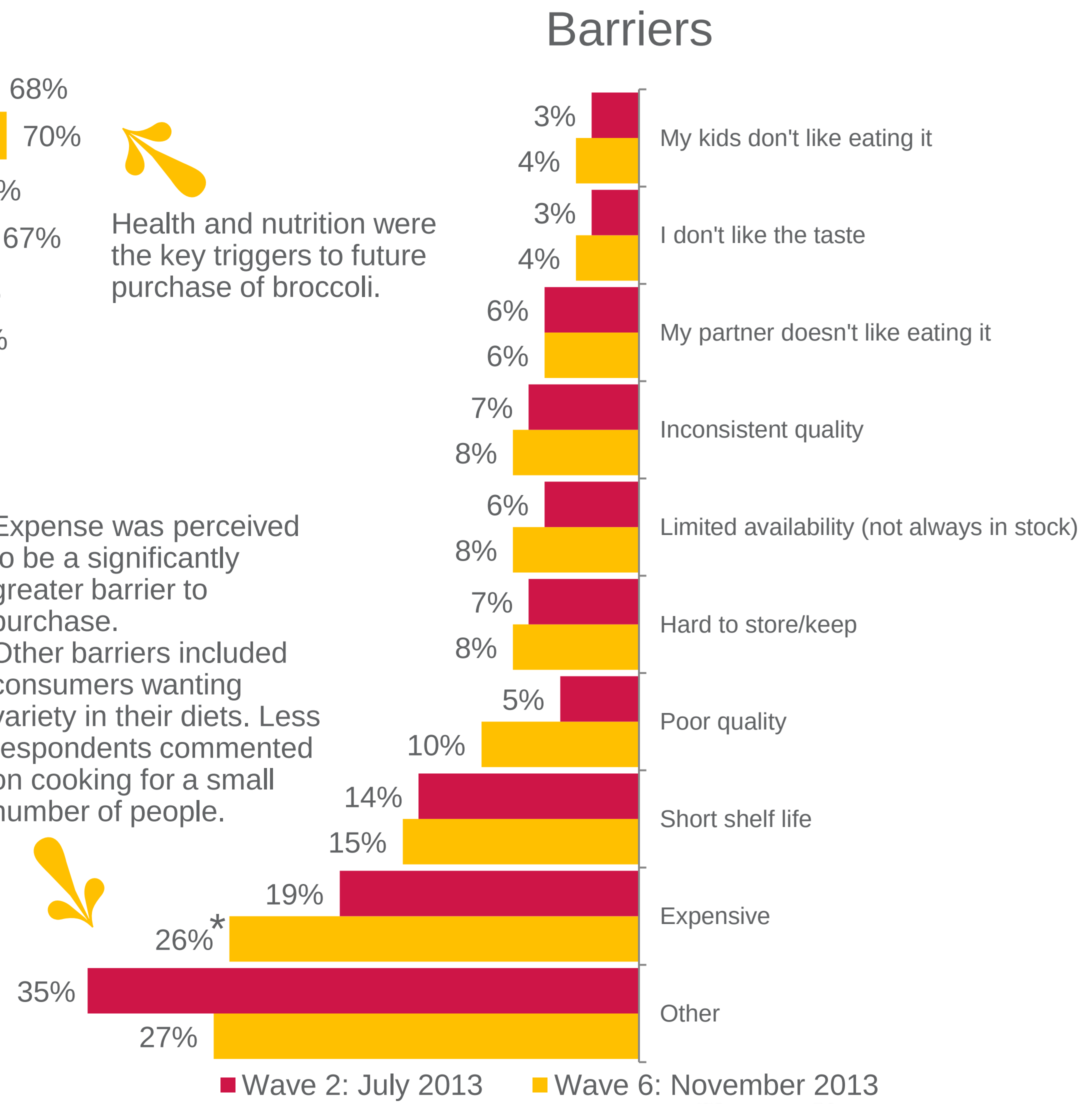
Q6a. What varieties of <commodity> are you aware of? (unprompted)
Sample Wave 2 N=525 Wave 6 N=370
* indicates significantly higher score @ 95% CI

Triggers & Barriers to Purchase
Broccoli



Health and nutrition were the key triggers to future purchase of broccoli.

Expense was perceived to be a significantly greater barrier to purchase.
Other barriers included consumers wanting variety in their diets. Less respondents commented on cooking for a small number of people.

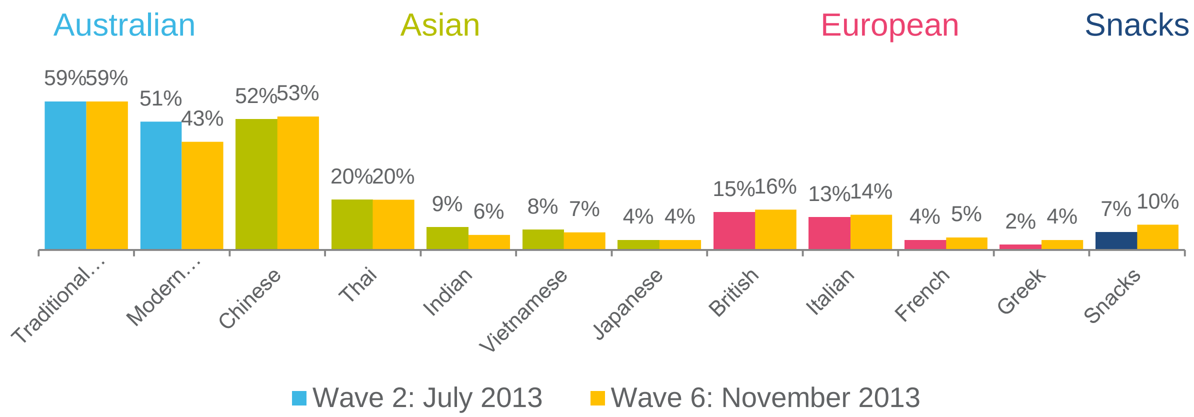


Sample Wave 2 N=525 Wave 6 N=370
* indicates significantly higher score @ 95% CI
Q7. Which of the following reasons best describes why you purchase <commodity>?
Q8. Which reason best describes why you don't buy <commodity> more often?

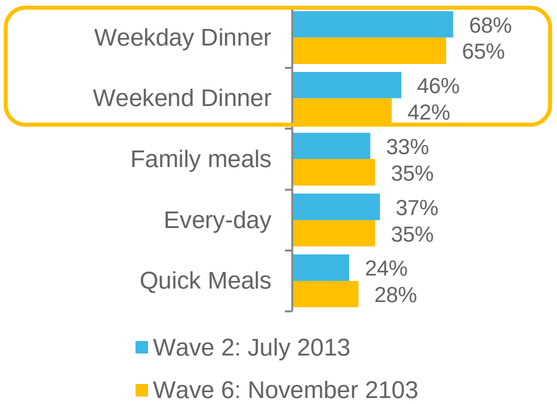
Cooking Preferences & Occasions: Broccoli

- Overall, cooking styles and occasions were on trend with Wave 2.
- Australian cuisine remained the most common cuisine that broccoli was cooked in, with dinner the main consumption occasion.
- There was a increase in accompanying with cauliflower, green peas and pumpkin.

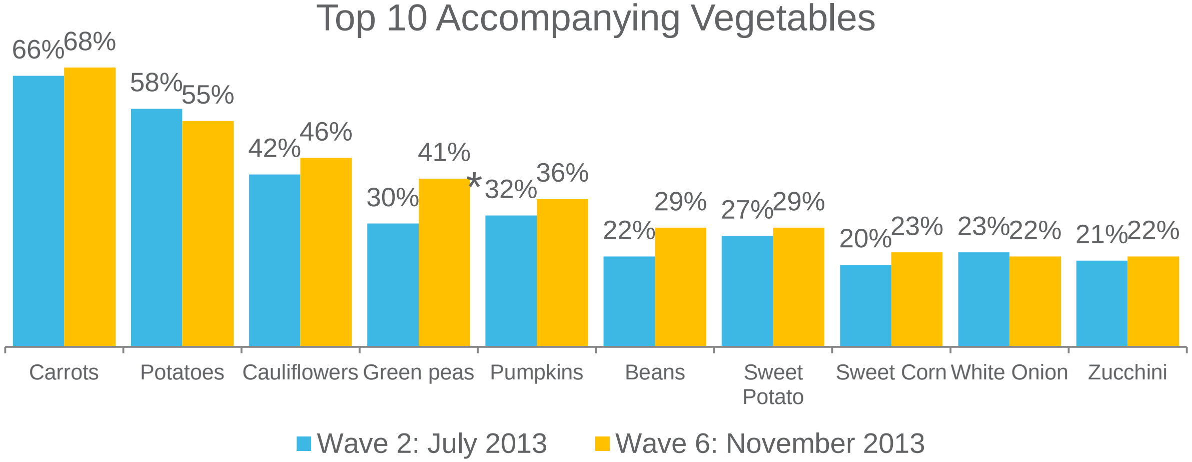
Typical Cuisine Cooked



Top 5 Consumption Occasions



Top 10 Accompanying Vegetables



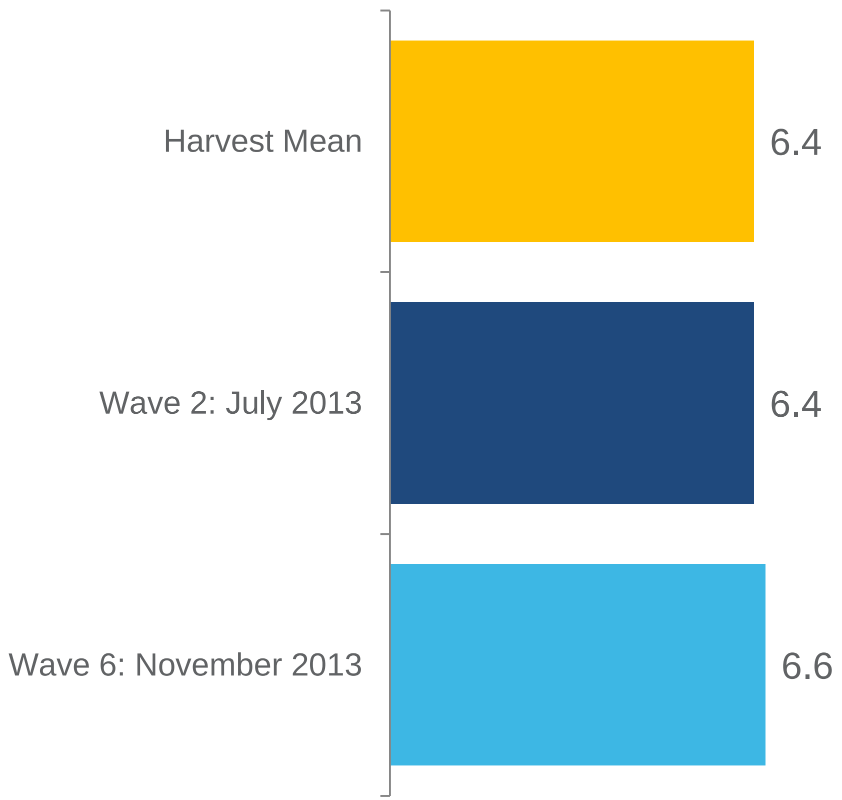
Top 10 Cooking Styles

	Wave 2	Wave 6
Steaming	61%	66%
Stir frying	49%	51%
Boiling	37%	34%
Microwave	32%	27%
Sautéing	6%	12%
Raw	9%	11%
Blanche	11%	11%
Soup	13%	10%
Stewing	10%	6%
Frozen	3%	4%

Sample Wave 2 N=525 Wave 6 N=370
* indicates significantly higher score @ 95% CI
Q9. How do you typically cook <commodity>?
Q10. What cuisines do you cook/consume that use <commodity>?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
Q11. Which of the following occasions do you typically consume/use <commodity>?

Importance of Provenance
Broccoli

⇛ The importance of provenance with Broccoli remains strong.

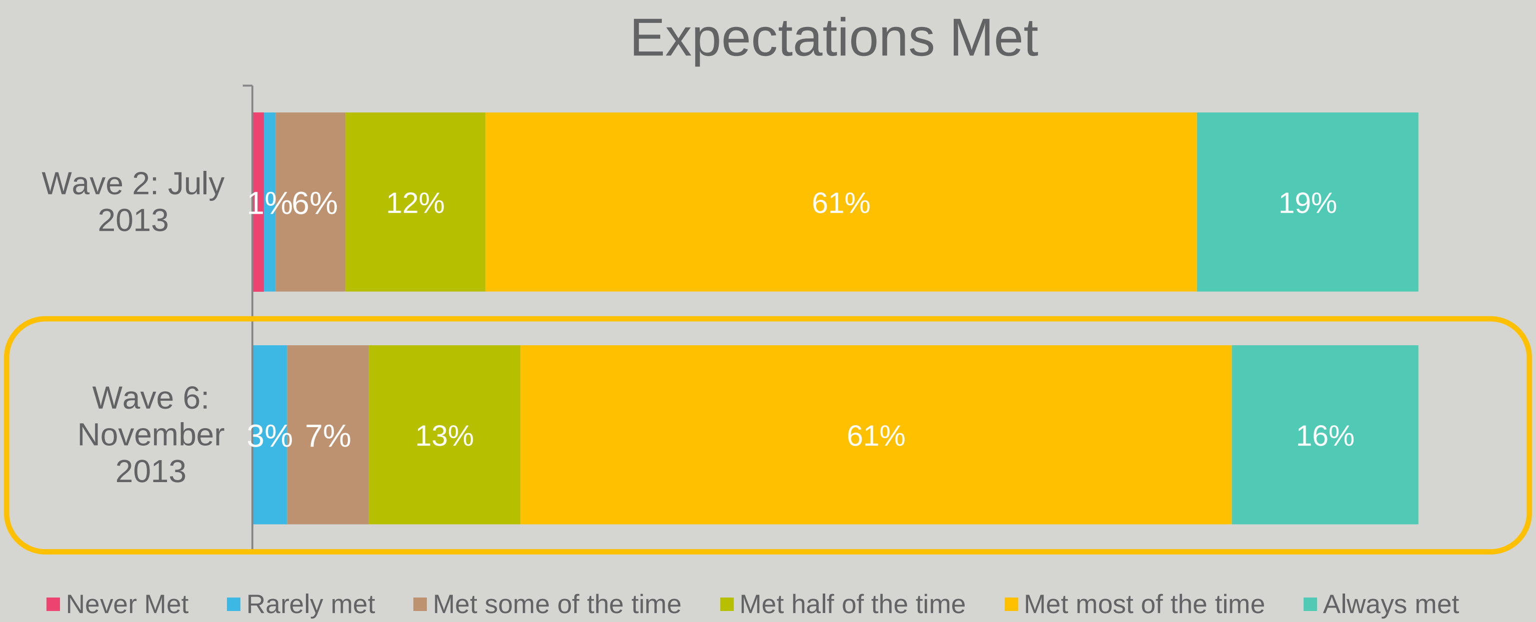


Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 2 N=525 Wave 6 N=370

Freshness and Longevity: Broccoli

Expected to stay fresh for **7.1** days
(cf. 7.8 days Wave 2)

- There was a slight shift in expectations in expectations of broccoli freshness between Waves. Wave 6 respondents indicated that expectations of freshness were less likely to be met.
- Respondents indicated they expected broccoli to stay fresh for one week, which is slightly lower compared with Wave 2.



Sample Wave 2 N=525 Wave 6 N=370
Q12. How long do you expect <commodity> to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy <commodity> ?

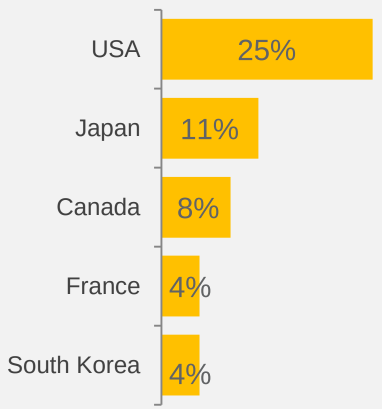
Trends: Broccoli

Broccoli Global NPDs

September-November 2013

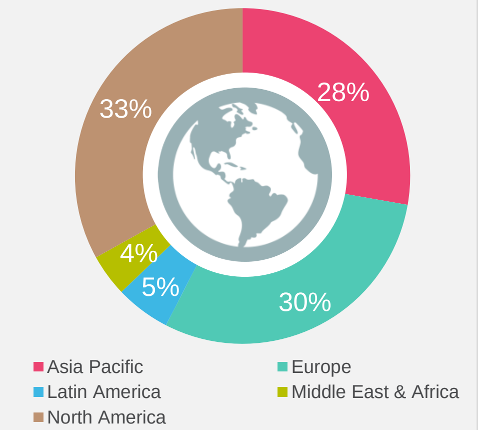
There were 245 new broccoli products launched globally over the last 3 months. These launches primarily occurred in 3 regions (Europe, Asia Pacific & North America). The top categories where products were launched in were meals, fruit and vegetables and baby food.

Country

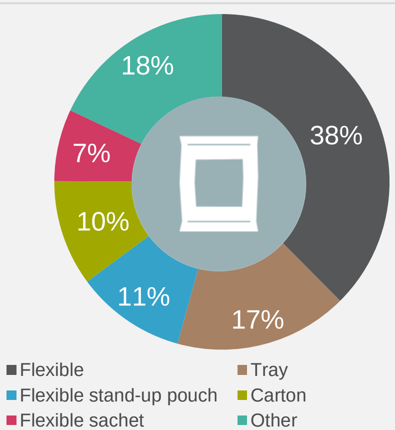


245 Global NPDs

Region



Top Pack Formats



Categories

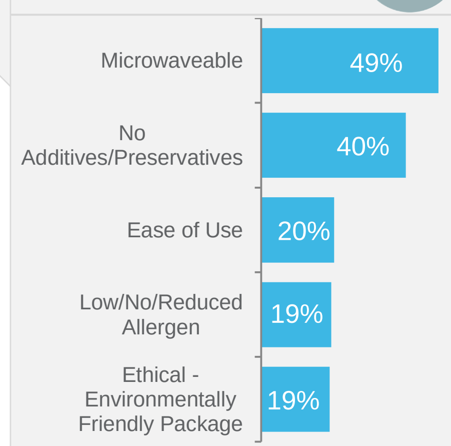
Meals 34%

Fruit & Vegetables 16%

Baby Food 10%

Juice Drinks 8%

Top Claims



Broccoli Product Launches:
Last 3 Months (September-November 2013)
Summary

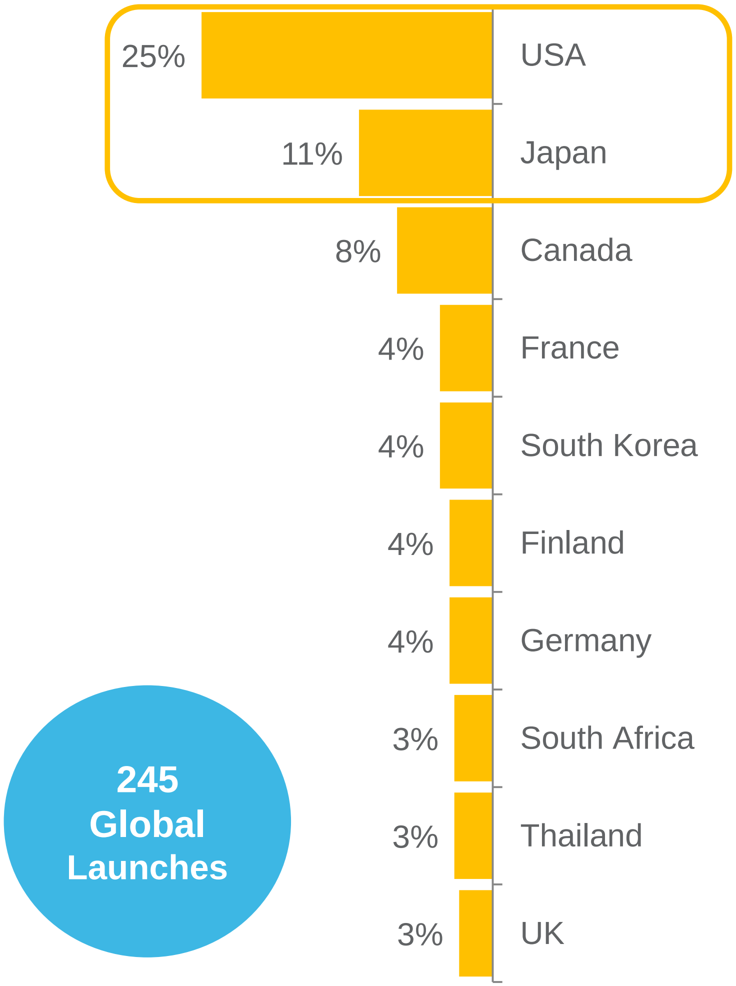
- A total of 245 products containing broccoli as an ingredient were launched globally within the last 3 months, which is a 145% increase in the number of launches compared with April-June 2013.
- Five products containing broccoli were launched in Australia in the past 3 months, which is higher than the single product launched in Australia in Wave 2.
- North America, Europe and Asia Pacific were the top regions for broccoli product launches (33%, 30% & 28% respectively).
- Flexible pack formats were the most used format for launches in the last 3 months (38%), followed by trays (17%).
- The top categories for launches were meals (34%), fruit and vegetable goods (16%) and baby food (10%).
- The core claims used for launches centred around convenience and health, with microwaveable being the top claim (49%) followed by no additives/preservatives (40%). These claims were made more frequently compared with products launched April-June 2013.
- The most innovative launches found were multivitamins containing broccoli and baby food seasoning. Examples of these can be found in the following pages.

Source: Mintel (2013)

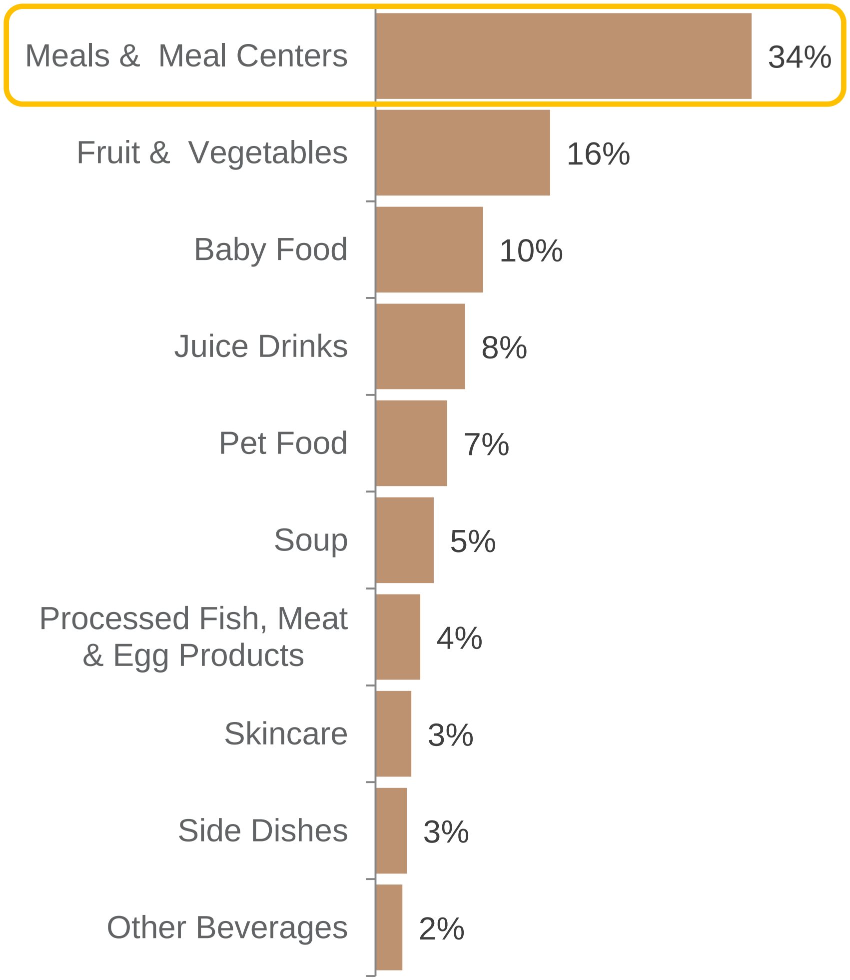
Broccoli Launches
Country & Categories

- The most active countries for launches in the last 3 months were USA and Japan, same as Wave 2.
- Meals & meal centres was the dominant category in the last 3 months, with over a third of all launches.

Top 10 Launch Countries



Top 10 Launch Categories



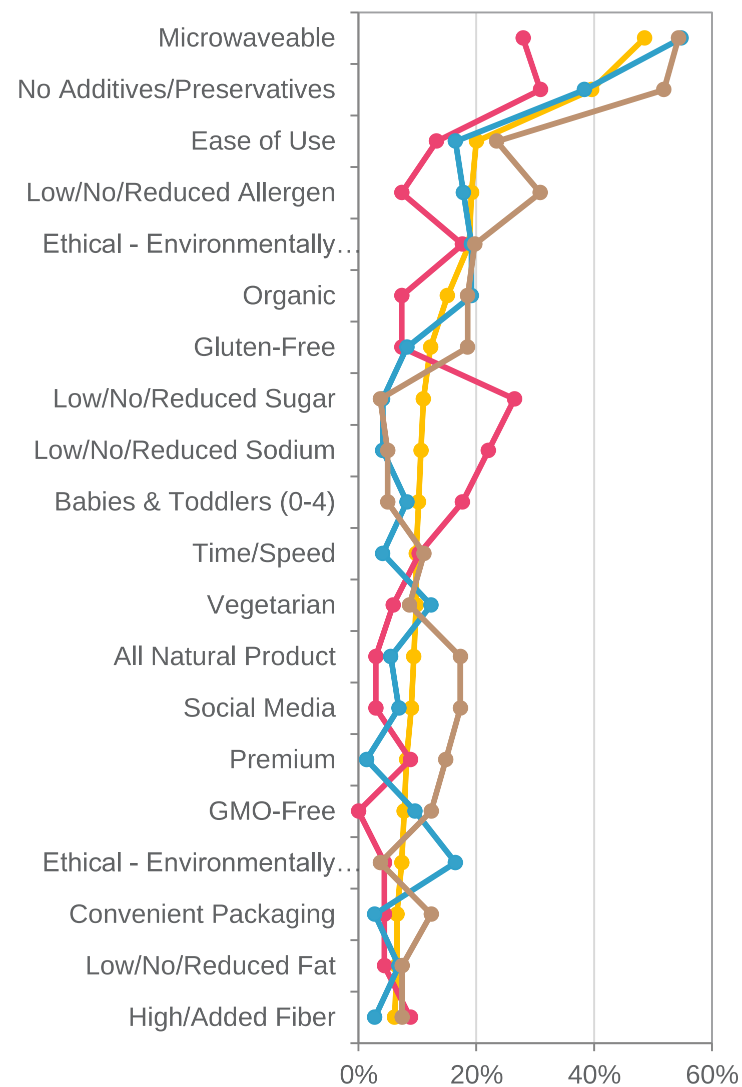
Number of Global Broccoli NPD for the L3M N=245

Broccoli Launches

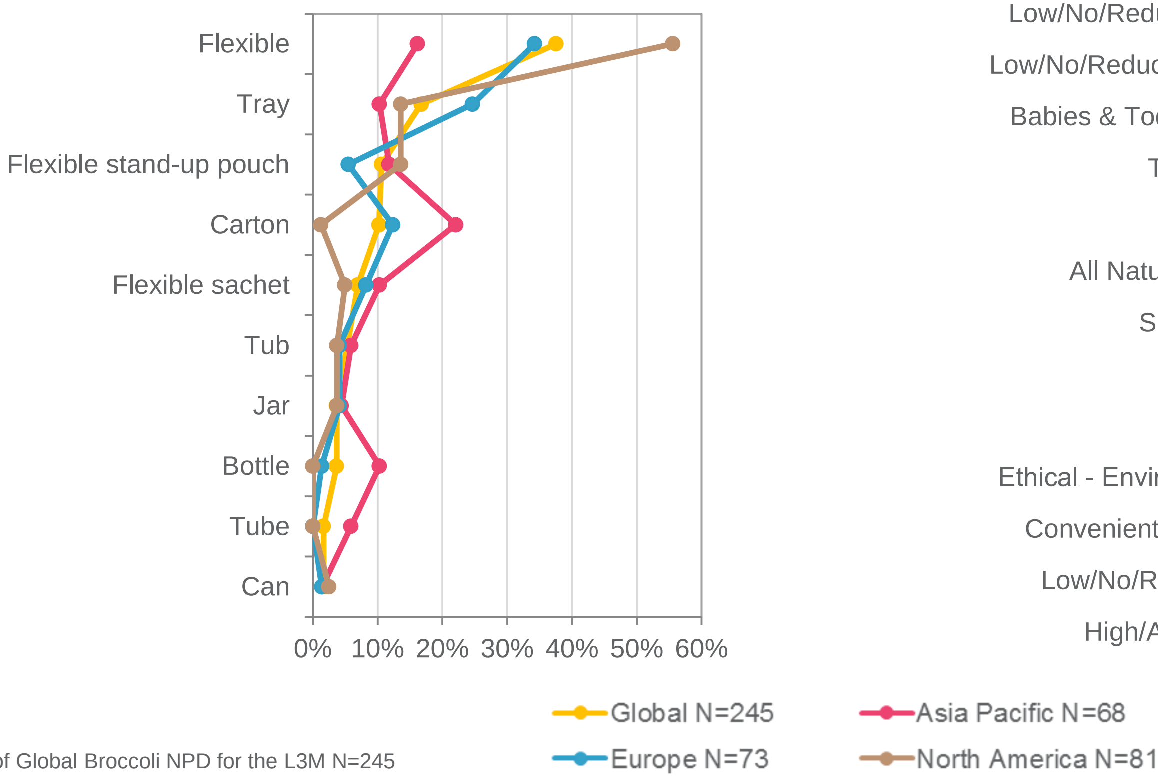
Top Claims & Pack Formats Used

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

Top Claims Launched



Top Packs Launched



Number of Global Broccoli NPD for the L3M N=245
Only regions with n >30 are displayed

Innovative Broccoli Launches:
L3M (September-November 2013)

De Kleine Keuken Spelt Pasta (Germany)

De Kleine Keuken Speltpasta (Spelt Pasta) is an organic baby food with spelt pasta, chicken, broccoli, cream cheese and basil for babies from seven months that is said to be full of pure flavours and cut very finely. The product is microwaveable, free of additives and retails in a 160g pack.

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

Martha Stewart Essentials Women's Multivitamin Capsules (USA)

Martha Stewart Essentials Women's Multivitamin Capsules are now available. This vitamin/mineral/herb supplement represents a new line of whole-food-based supplements created especially for women and made in consultation of nutritional science experts.

Claims:
Botanical/Herbal, Skin, Nails & Hair (Functional), Other (Functional), Ethical - Environmentally Friendly Package, Vegetarian, Anti-Ageing, Female, Digestive (Functional), Bone Health

Blue Longevity Ideal Weight Formula Natural Food for Mature Cats (Canada)

Blue Longevity Ideal Weight Formula Natural Food for Mature Cats with LifeSource bits is an optimal calorie formula made with natural and wholesome ingredients and added vitamins and minerals. It is said to be delicious and fully satisfying. Each meal helps minimize the calorie intake, so the cat is more likely to stay lean and at a healthy weight.

Claims:
No Additives/Preservatives, Vitamin/Mineral Fortified, Low/No/Reduced Allergen, Pet - Adult, Low/No/Reduced Calorie, Slimming (Functional Pet), Weight & Muscle Gain (Functional Pet), Immune System (Functional Pet), Other (Functional Pet), High Satiety

Kagome Yasai Seikatsu 100 Niagara Mix Juice (Japan)

Kagome Yasai Seikatsu 100 Niagara Mix Juice has been repackaged. The seasonal product features Niagara grapes from Shinshu, and is from sodium, sugar and preservatives. It is made with 21 vegetables and three fruits. The product retails in a 200ml carton pack. Launched on September 17, 2013. RRP not available.

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

Source: Mintel (2013)

Innovative Broccoli Launches:
L3M (September-November 2013)

Nutri-C Salo-Salo Instant Fruits & Veggies Powdered Juice Drink (Philippines)

Nutri-C Salo-Salo Instant Fruits & Veggies Powdered Juice Drink has been repackaged and reformulated with multi-vitamins and folate. This halal certified product is now available in a redesigned 33g pack which makes one litre and features the Swiss Vitamin Institute Tested approved and certified logo. The powdered juice drink contains vitamins A, B2, B3, B6

Claims:
Beauty Benefits, Brain & Nervous System (Functional), Immune System (Functional), Other (Functional), Time/Speed, Halal, Antioxidant, Children (5-12), Cardiovascular (Functional)

Kalma VegaVital Vegetable Burger (Czech Republic)

Kalma VegaVital Zeleninový Karbenátek (Vegetable Burger) is a GMO-free soy product that contains 0% cholesterol. The product retails in a 150g pack with two burgers.

Claims:
No Animal Ingredients, Low/No/Reduced Cholesterol, GMO-Free, Microwaveable

Sundown Naturals Women's Formula Whole Food Multivitamin (USA)

Sundown Naturals Women's Formula Whole Food Multivitamin is a vegetarian multivitamin with whole food concentrates designed to support women's health. This cutting-edge formula blends green foods and a citrus complex along with supporting herbs for a synergistic supportive formula not found in a common multivitamin. .

Claims:
Low/No/Reduced Lactose, No Additives/Preservatives, Immune System (Functional), Low/No/Reduced Allergen, Botanical/Herbal, Skin, Nails & Hair (Functional), Other (Functional), Eye Health, Ethical - Environmentally Friendly Package, Low/No/Reduced Sugar, Vegetarian, Antioxidant, Female

Diam Broccoli & Blue Cheese Pie (Czech Republic)

Diam Slany Kolac Brokolice-Niva (Broccoli & Blue Cheese Pie) is now available. This product is retailed in a 160g pack.

Claims:
N/A

Source: Mintel (2013)

Innovative Broccoli Launches:

L3M (September-November 2013)

Ivenet Bebe Recipe Baby Food Seasoning with Broccoli, Sweet Potato and Carrot (South Korea)

Ivenet Bebe Recipe Baby Food Seasoning with Broccoli, Sweet Potato and Carrot is described as natural and nutritious. This freeze-dried product is made using 100% Korean ingredients without any artificial additives including preservative, colouring and flavouring. It is suitable for babies from six months, and retails in a 20g pack.

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

Vcare Green Juice (Hong Kong)

Vcare Green Juice is made with 26 kinds of healthy vegetables, including the blending of 12 natural green vegetables, and five fresh fruits and herbs. According to manufacturer, this beverage mix helps to delay ageing, improve qi, relieve the problem of low blood pressure, improve blood circulation and digestion and encourage weight loss.

Claims:
No Additives/Preservatives, Other (Functional), Slimming, Anti-Ageing, Cardiovascular (Functional), Digestive (Functional)

Conad Cereals Soup with Barley, Spelt, Wheat and Vegetables (Italy)

Conad Zuppa Ai Cereali Con Orzo, Farro, Grano e Verdure (Cereals Soup with Barley, Spelt, Wheat and Vegetables) is a healthy and light soup and is free from preservatives and glutamate. The product is ready in 15 minutes, and retails in a 106g pack serving 3 portions.

Claims:
No Additives/Preservatives

Qrunch Quinoa Burgers (USA)

Qrunch Quinoa Burgers are said to be versatile, delicious and nutritious. This USDA organic certified product is free from gluten, GMO, soy, wheat, nut, egg, dairy and corn, is light in sodium, and is made with ancient whole grains known as a superfood. This easy-to-prepare product is suitable for vegetarians, and retails in a 12.8-oz. recyclable pack

Claims:
Low/No/Reduced Allergen, GMO-Free, Gluten-Free, Ethical - Environmentally Friendly Package, Social Media, Ease of Use, Organic, Low/No/Reduced Sodium, Vegetarian, Wholegrain

Source: Mintel (2013)

Australian Broccoli Launches:
L3M (September-November 2013)

Heinz Steam Fresh Meals Honey Soy Chicken

Heinz Steam Fresh Meals Honey Soy Chicken is a meal that is high in protein and dietary fiber, low in sugar, 97% fat free and contains one serve of vegetable per pack. The meal includes snap frozen veggies, rice and tender marinated cooked chicken, all in a deliciously rich honey soy sauce and sealed in a steamer bag to retain its goodness

Street Food Meal Pots Japanese Soba Noodles

Street Food Meal Pots Japanese Soba Noodles with chicken, sweet soy dressing and edamame beans are said to take flavour inspiration from exotic night markets, food stalls and street-side dining carts. The microwavable product is made in Australia, described as fresh and fast, requires just heating in three minutes and retails in a 310g pack.

Passage Foods Pasta Sauce For Kids Creamy Broccoli, Spinach & Zucchini Sauce

Passage Foods Pasta Sauce For Kids Creamy Broccoli, Spinach & Zucchini Sauce is described as a delicious creamy blend that is made with all natural ingredients. The gluten free sauce is designed for children aged between three and ten, can be microwave heated and contains no added sugar.

Pitango Vegetable & Quinoa Organic Soup

Pitango Vegetable & Quinoa Organic Soup is free from gluten, 99% fat and added preservatives. This microwaveable product retails in a 600g pack providing two servings. The company is dedicated to help achieve a sustainable lifestyle, by using organic and free-range products in a way that protects the environment and the natural sources.

Heinz Steam Fresh Sides Mixed Veg with Honey Soy Sauce

Heinz Steam Fresh Sides Mixed Veg With Honey Soy Sauce consist of baby carrots, broccoli and red capsicum. This product is perfect as a side dish and is a source of folate, vitamin A, fibre and vitamin C. It is 99% fat free, microwavable and retails in a 300g pack with two steamer bags. The product can be steamed in the bag in under four minutes.

Source: Mintel (2013)

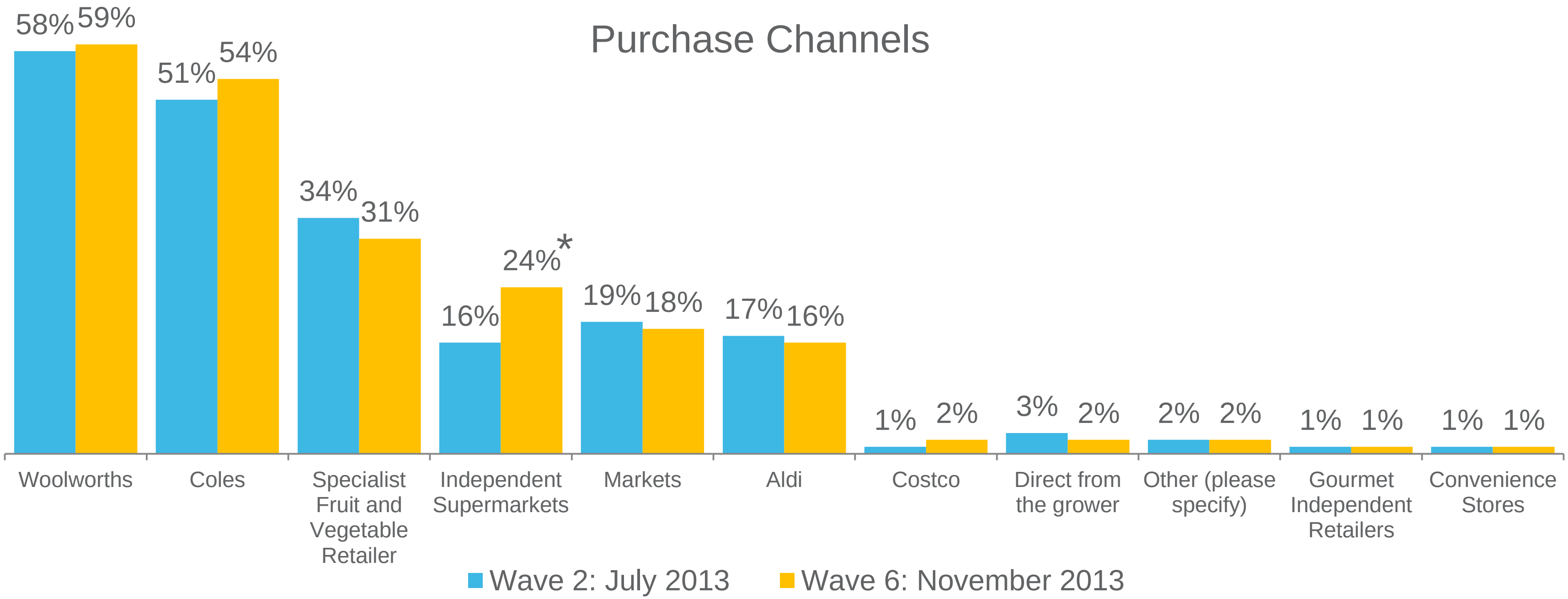
Green Peas.

Purchase and Consumption Behaviour
Green Peas

Average Purchase **4.0** times per month (cf. 3.6 times per month Wave 2)

Average Consumption **10.5** times per month (cf. 9.7 times per month Wave 2)

- There was a significant increase in purchase from independent supermarkets compared with Wave 2. There was also trend towards greater purchase from mainstream retail channels.
- Although no significant differences, there was an increasing trend in purchase and consumption frequency.



Q1. On average, how often do you purchase <commodity>?
Q2. On average, how often do you consume <commodity>?
Q5. From which of the following channels do you typically purchase <commodity>?
Sample Wave 2 N=503, Wave 6 N=339
* Indicates significantly higher score between Waves at 95% CI

Average Spend & Price Sensitivity

Green Peas

- The average consumer typically purchased **800g** of Green Peas in November, an increase from July (700g).

- The average recalled last spend on Green Peas was **$4.35** in November, an increase from July ($3.94)**.**

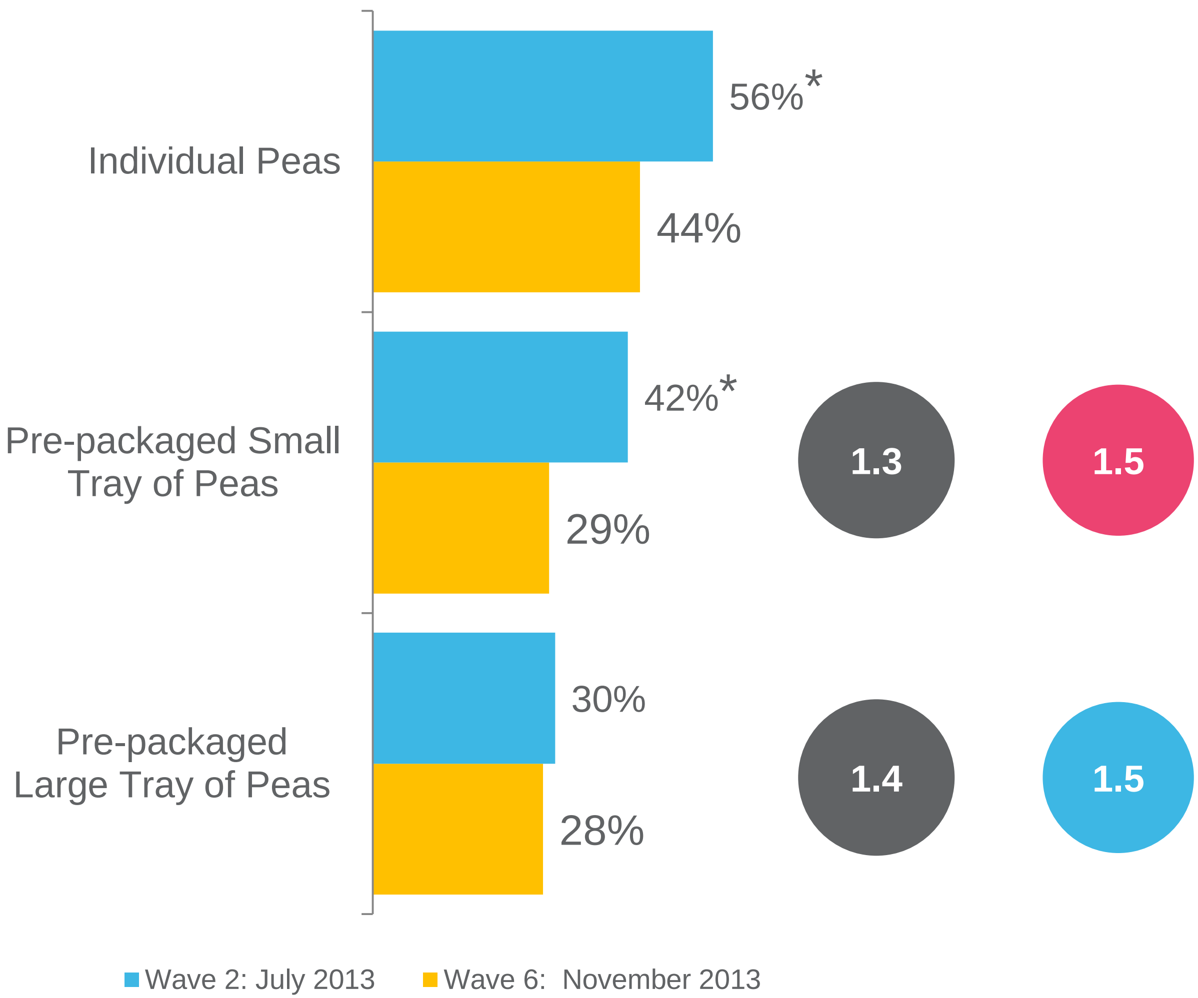
- Consumers perceived the average price for Green Peas as good value for money **(6.3/10) in November,** this was on par with July (6.4/10).

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

Pack Formats Purchased

Green Peas

Amount Purchased if Selected
(Wave 2) (Wave 6)

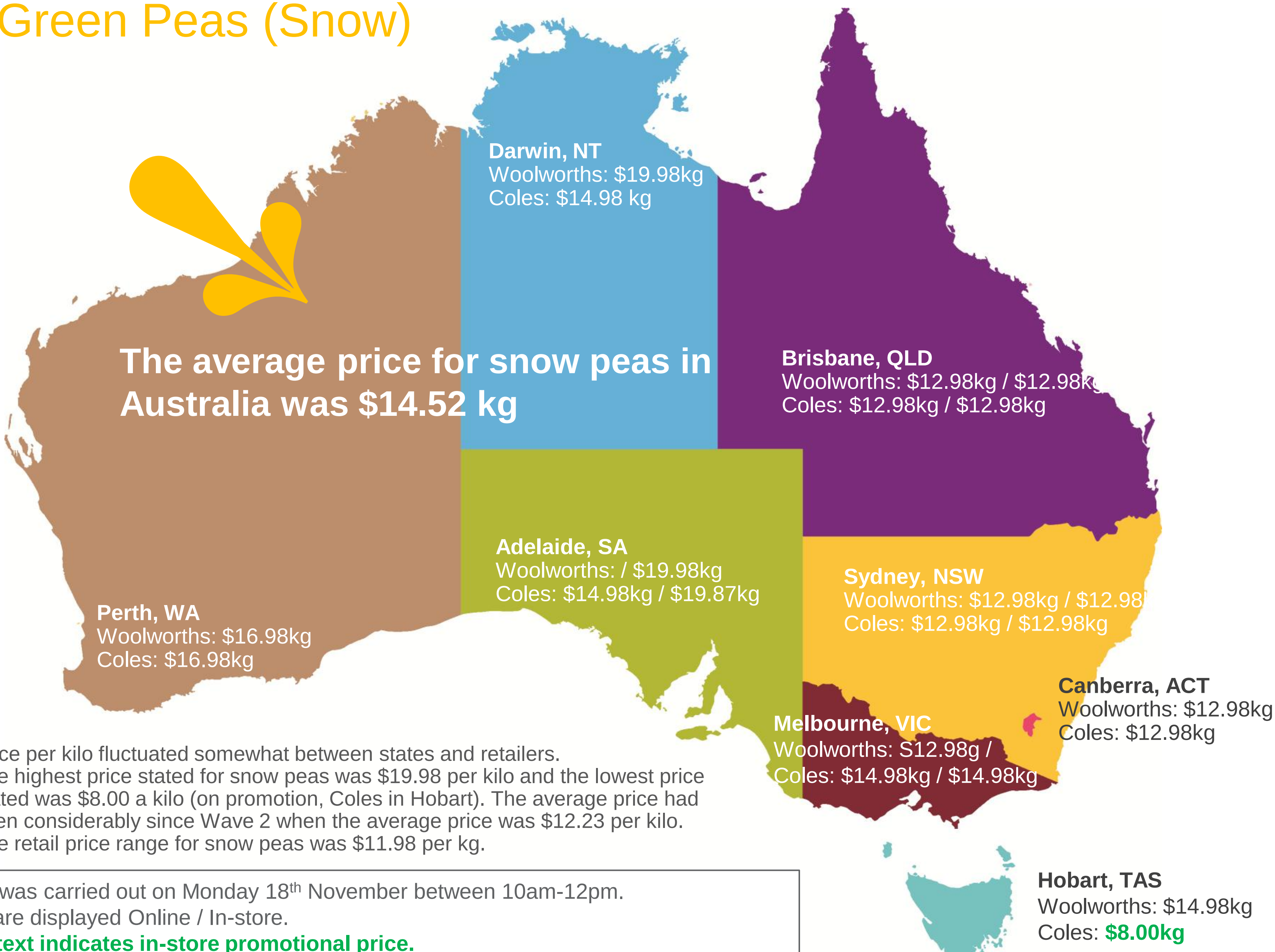


- Purchase of all green pea formats have decreased compared with Wave 2, significantly for individual peas and small trays.
- Number of formats purchased were on trend between Waves.

Q3a. How much <commodity> does this typically equate to?
Sample Wave 2 N=503, Wave 6 N=339
* Indicates significantly higher score between Waves at 95% CI

Online and In-store Commodity Prices

Green Peas (Snow)



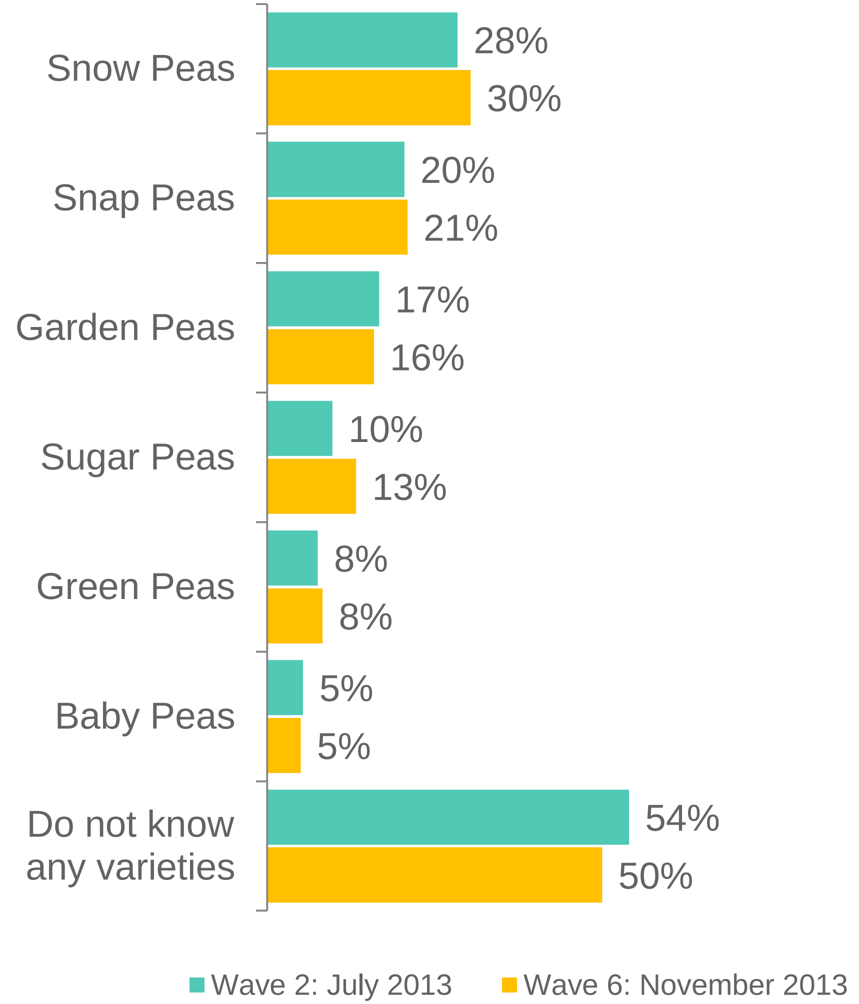
- Price per kilo fluctuated somewhat between states and retailers.
- The highest price stated for snow peas was $19.98 per kilo and the lowest price stated was $8.00 a kilo (on promotion, Coles in Hobart). The average price had risen considerably since Wave 2 when the average price was $12.23 per kilo.
- The retail price range for snow peas was $11.98 per kg.

Pricing was carried out on Monday 18th November between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates in-store promotional price.

Spontaneous Varietal Awareness & Purchase

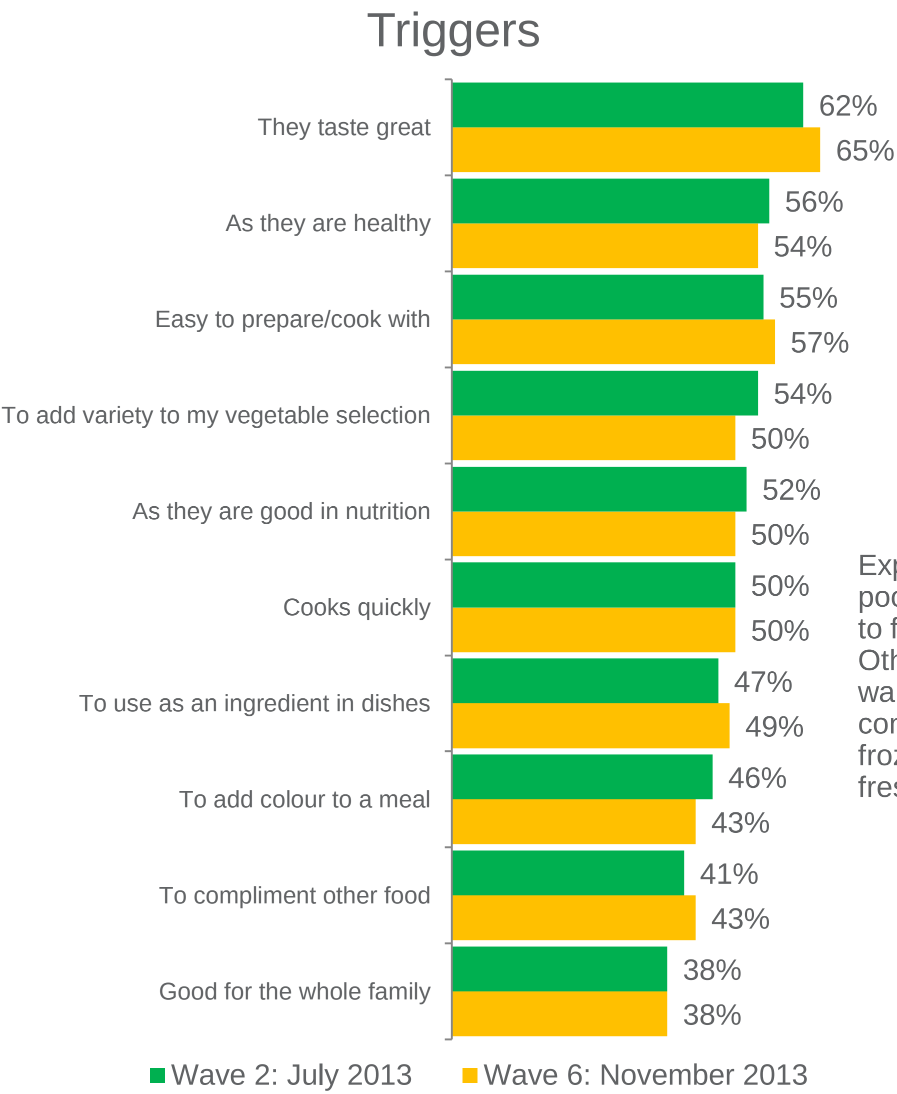
Green Peas

- Awareness of green pea types were on trend with Wave 2, with Snow Peas still the most recalled variety of green peas.
- There was a slight decrease in respondents indicating that they were unaware of green pea types.



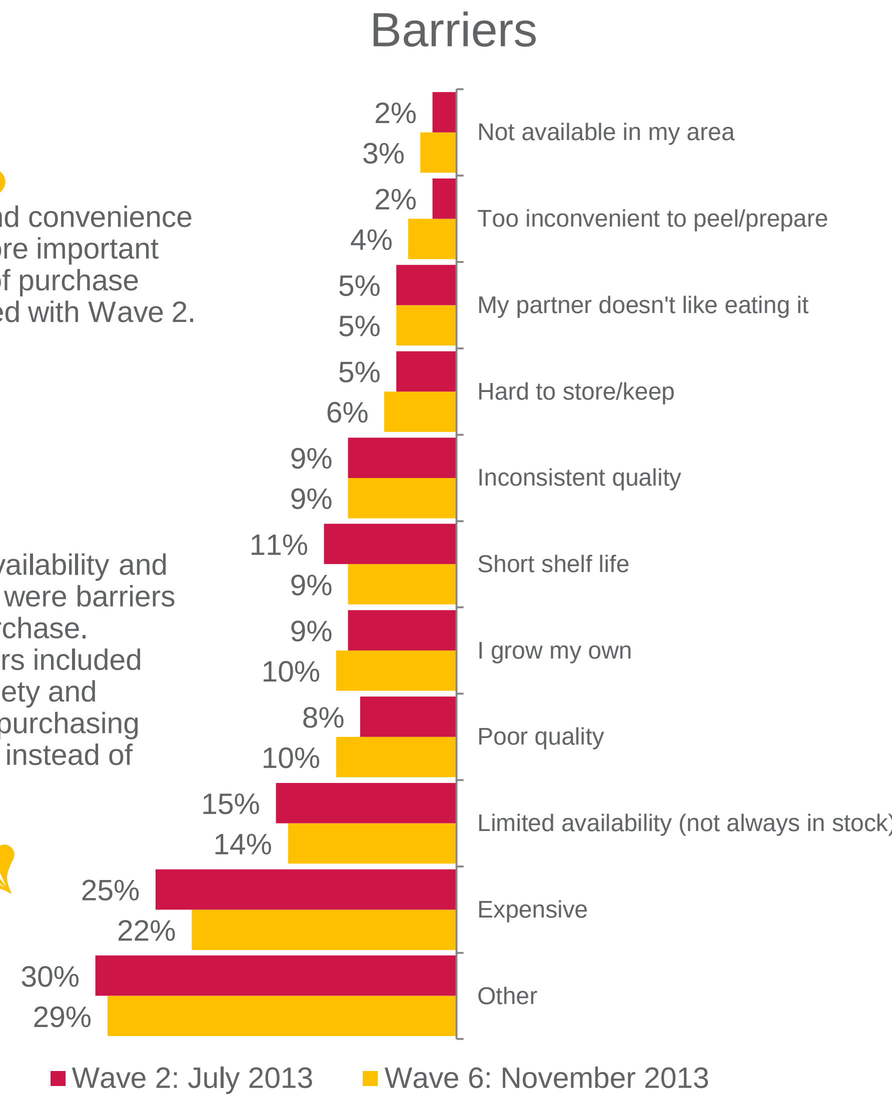
Sample Wave 2 N=503, Wave 6 N=339
* Indicates significantly higher score between Waves at 95% CI
Q6a. What types/varieties of <commodity> are you aware of? (unprompted)

Triggers & Barriers to Purchase
Green Peas



Taste and convenience were more important drivers of purchase compared with Wave 2.

Expense, availability and poor quality were barriers to future purchase. Other barriers included wanting variety and consumers purchasing frozen peas instead of fresh.

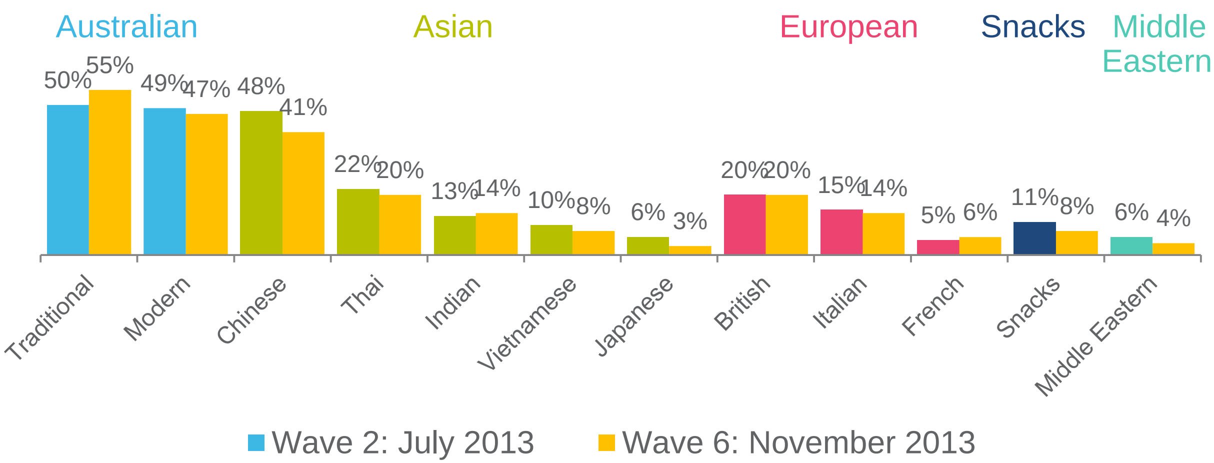


Sample Wave 2 N=503, Wave 6 N=339
* Indicates significantly higher score between Waves at 95% CI
Q7. Which of the following reasons best describes why you purchase <commodity> ?
Q8. Which reason best describes why you don't buy <commodity> more often?

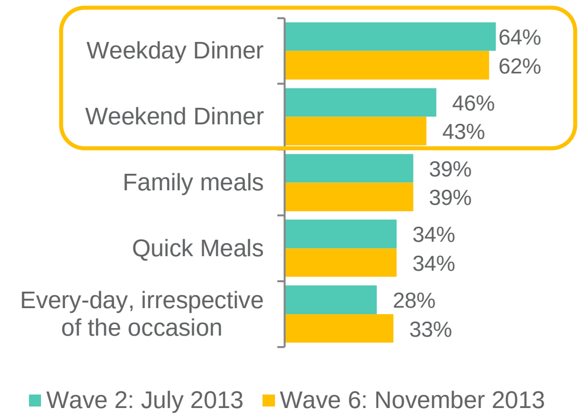
Cooking Preferences & Occasions: Green Peas

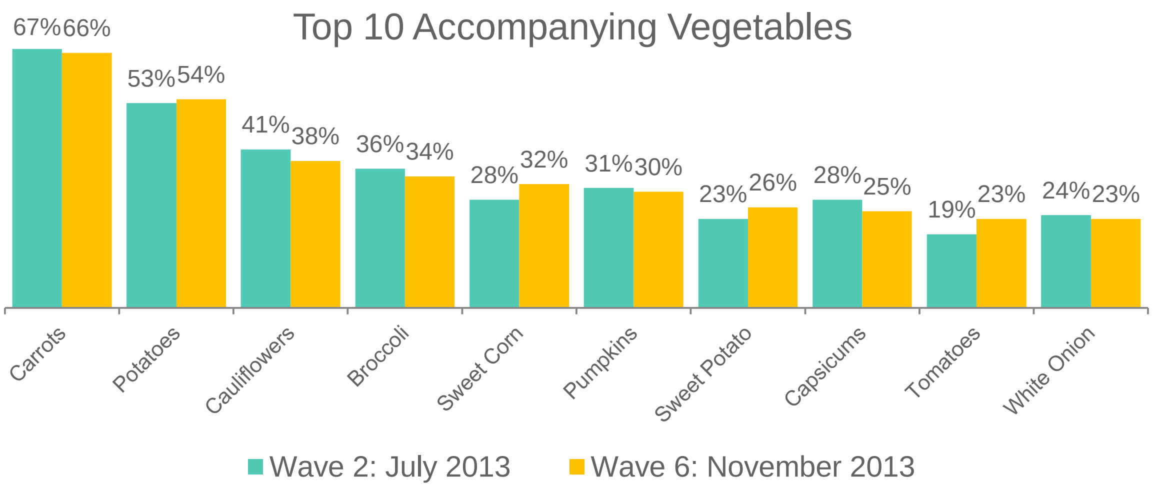
- ⇛ Australian was still the main cooking cuisine for green peas. There was an increase in Chinese compared with Wave 2.
- ⇛ Green peas were more likely to be used as an 'every-day' vegetable, but were mainly used for dinner occasions.
- ⇛ Carrots, potatoes and cauliflowers were the main accompanying vegetables.

Typical Cuisine Cooked



Top 5 Consumption Occasions





Top 10 Cooking Styles		
	Wave 2	Wave 6
Stir frying	49%	46%
Steaming	47%	44%
Boiling	44%	43%
Microwave	28%	32%
Raw	24%	26%
Soup	17%	17%
Frozen	12%	16%
Stewing	12%	12%
Blanche	11%	11%
Sautéing	6%	6%

Sample Wave 2 N=503, Wave 6 N=339
* Indicates significantly higher score between Waves at 95% CI
Q9. How do you typically cook <commodity> ?
Q10. What cuisines do you cook/consume that use <commodity> ?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
Q11. Which of the following occasions do you typically consume/use <commodity> ?

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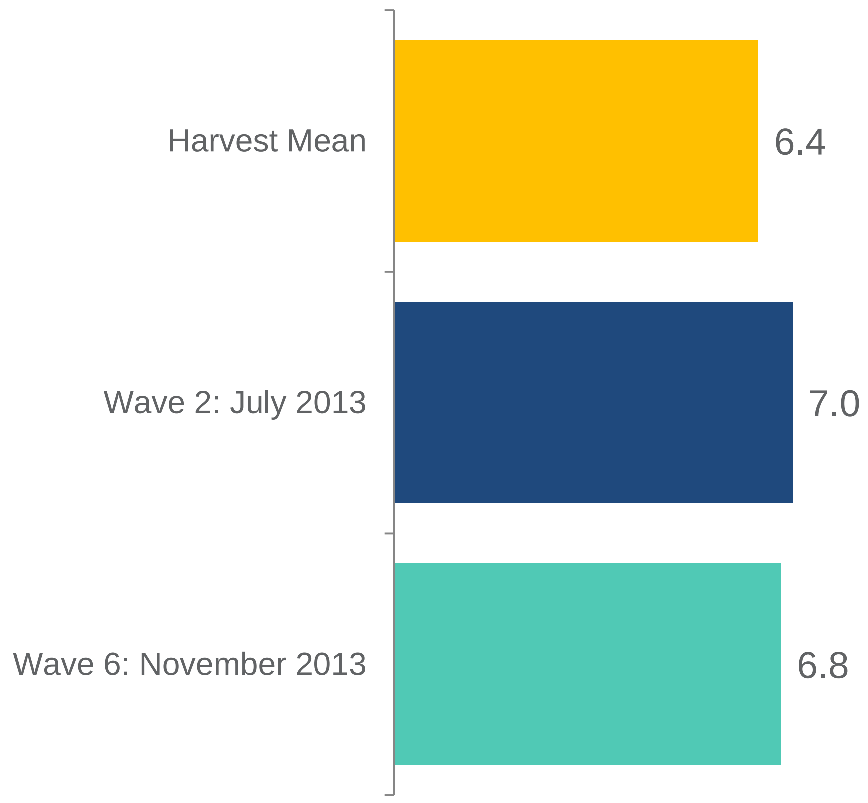
Importance of Provenance

⇛ Provenance of green peas still had a relatively high level importance in Wave 6.



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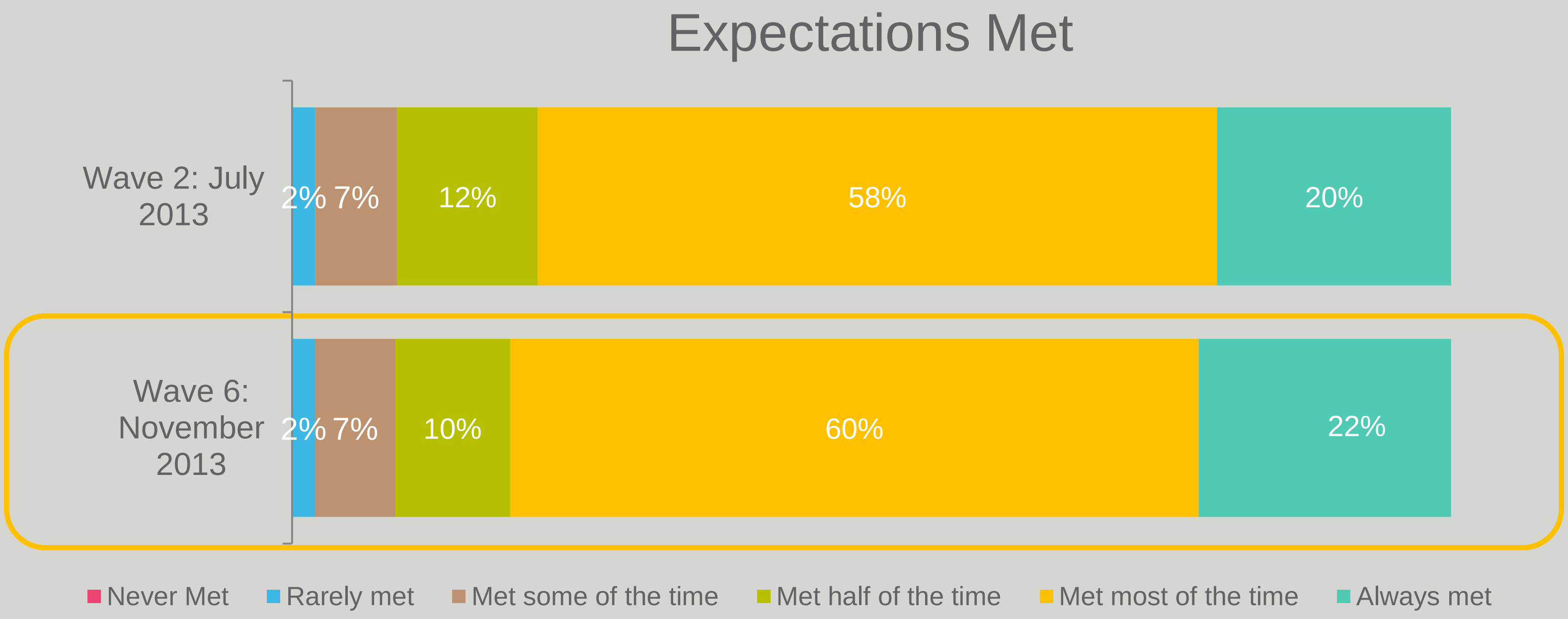
Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 2 N=503, Wave 6 N=339
* Indicates significantly higher score between Waves at 95% CI

Freshness and Longevity: Green Peas

Expected to stay fresh for **9.5** days (cf. 9.7 days Wave 2)

- Expectations of longevity of freshness were on par with Wave 2, remaining fresh for over 9 days.
- There was a slight increase in expectations being met, with 82% of respondents indicating this was met at least most of the time.



Sample Wave 2 N=503, Wave 6 N=339
* Indicates significantly higher score between Waves at 95% CI
Q12. How long do you expect <commodity> to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy <commodity> ?

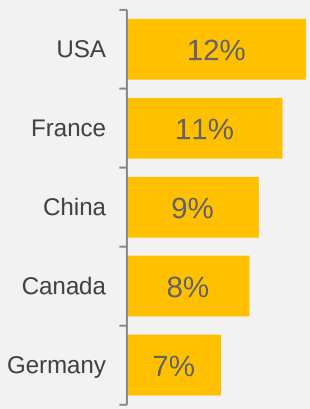
Trends:
Green Peas

**Pea was the search term in Mintel*

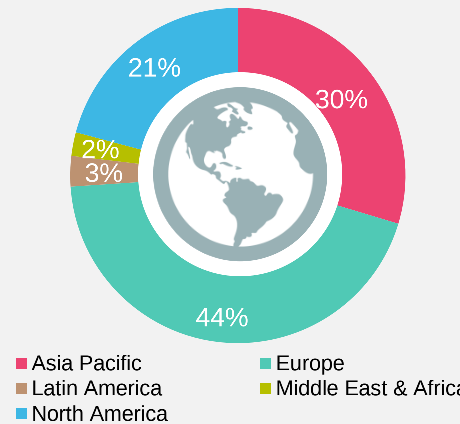
Green Peas Global NPDs
September-November 2013

There were 307 new products launched in the last 3 months that used green peas as an ingredient. The majority of these launches were in Europe. The top category products were launched in were processed food products, snacks and meals.

Country

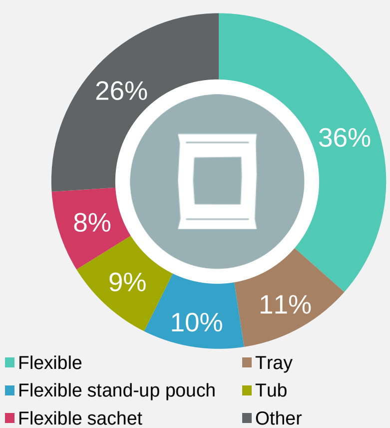


Region



307 Global NPDs

Top Pack Formats



Categories

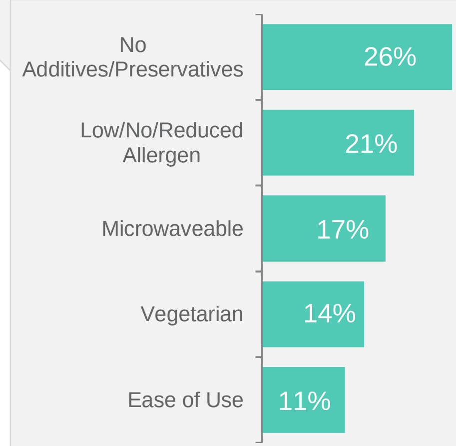
Processed Products 16%

Snacks 14%

Meals 13%

Bakery 7%

Top Claims



Green Peas Product Launches:
Last 3 Months (September-November 2013)
Summary

- A total of 307 products that contain green peas have been launched globally in the last 3 months, of which four launches were in Australia. This is an increase on the 198 global products launched in Wave 2.
- Europe & Asia Pacific regions were the top 2 locations for launches, with 44% and 30%, respectively, which was on trend with launches between April and June 2013.
- Flexible packaging was the most used pack format for launches in the last 3 months, with 36% of launches being packaged in this format.
- Top categories for launches were processed products (16%), snacks (14%) and meals (13%).
- The core claims used globally for launches focused around health: no additives/preservatives (26%), low/no/reduced allergen (21%) and vegetarian (14%).
- The most innovative launches found were hair shampoo containing peas, pea protein chips and beef floss containing pea protein. Examples of these can be found in the next slides.

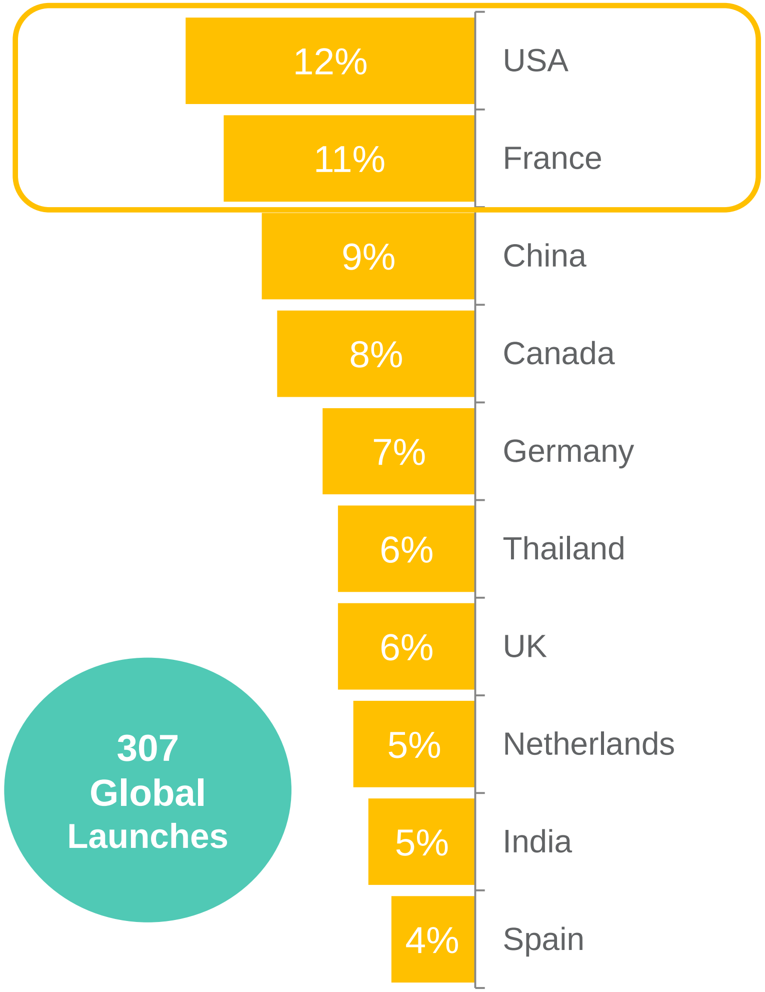
Source: Mintel (2013)

Green Peas SKUs

Country, Region & Categories

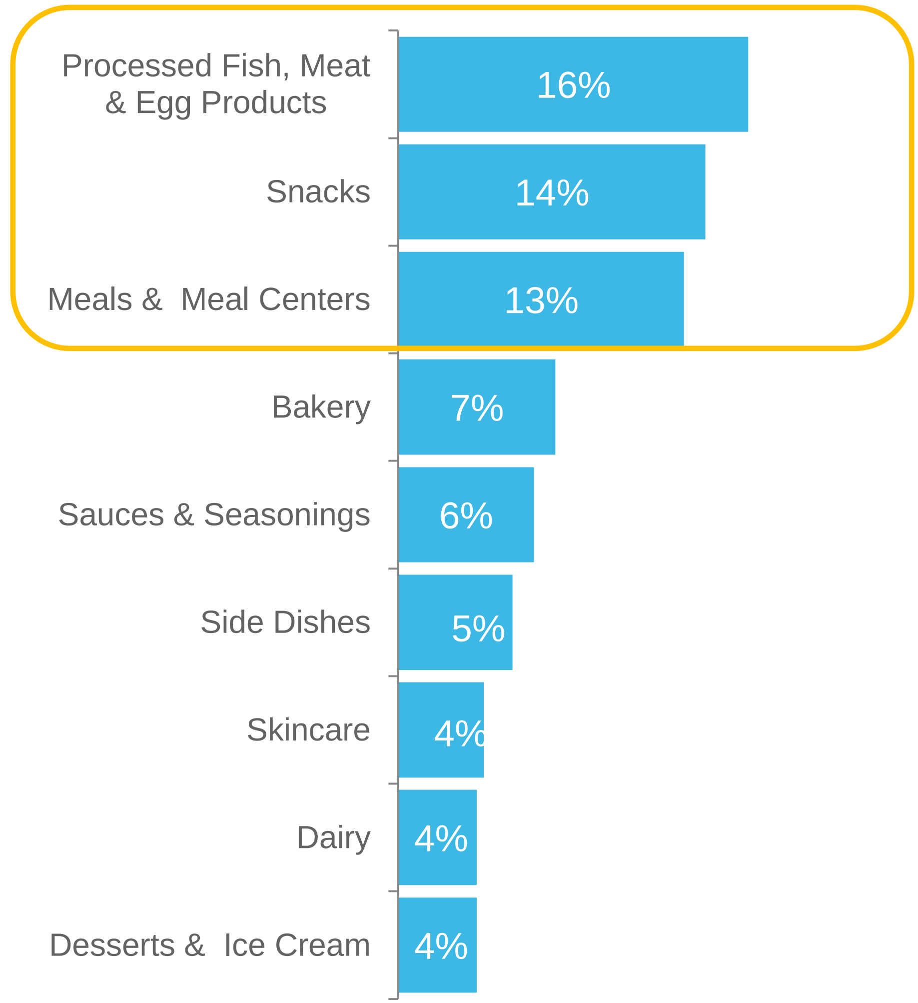
- The USA and France were the top 2 countries for launches of green pea products in the last 3 months.
- Processed food products, snacks and meals/meal centres were the top categories for launches, which was consistent with Wave 2.

Top Launch Countries



307 Global Launches

Top Launch Categories



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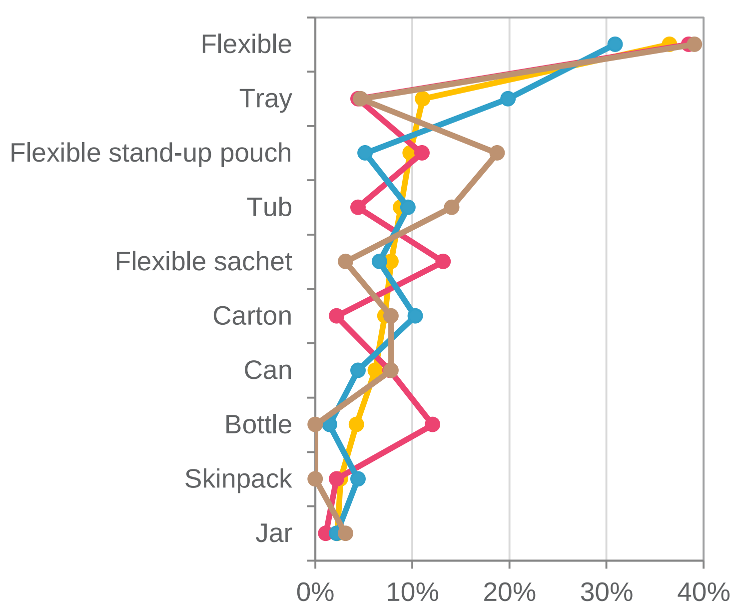
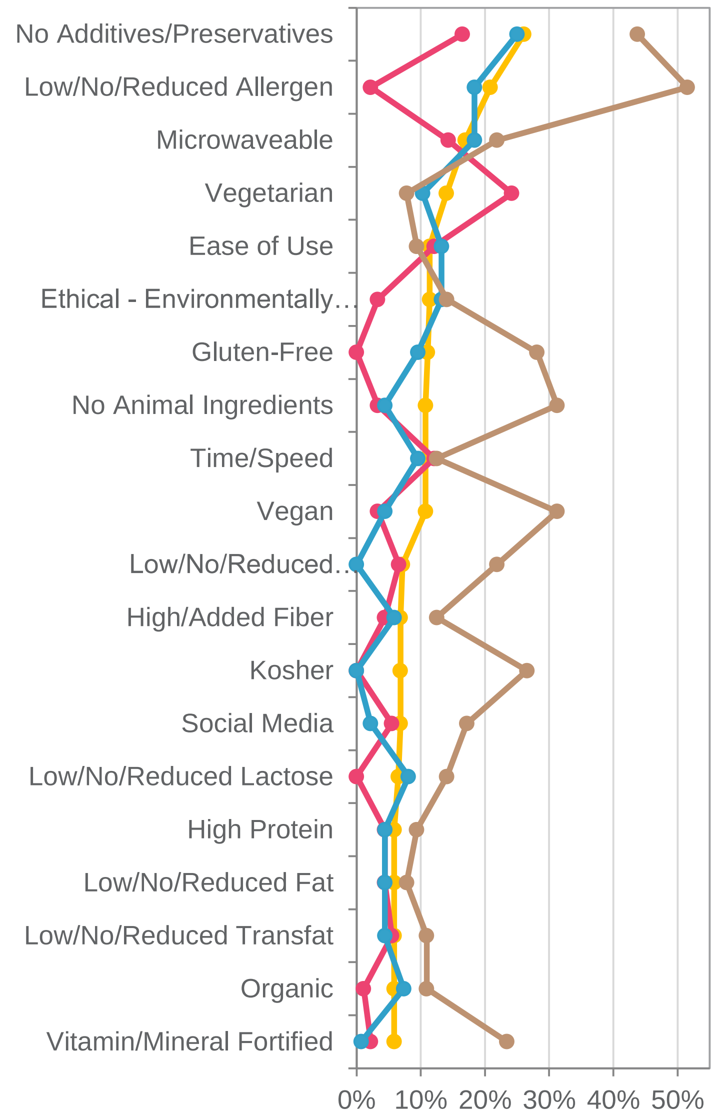
Number of Global Green Peas NPDs for the L3M N=307

Green Peas SKUs
Top Claims & Pack Formats Used

- No additives and preservatives, being microwaveable and having low/no/reduced allergens were the top claims used for products launched containing green peas. 'Health' claims, such as reduced allergen, gluten-free and vegan were popular in North America.
- Flexible pack formats were the most used pack format for launches in the last 3 months.





Global N=307
Asia Pacific N=91
Europe N=136
North America N=64

Number of Global Green Peas NPDs for the L3M N=307
Only shown at global level as no regions had more than 30 products launched.

Innovative Green Peas Launches:
L3M (September-November 2013)

Meydunlg Xiao Xiong De Zui Ai Wo Ai Guo Shu Beef Floss (China)

Meydunlg Xiao Xiong De Zui Ai Wo Ai Guo Shu Niu Rou Su (Wo Ai Guo Shu Beef Floss) contains added prebiotic and features a rock sugar formula. The baby snack is free from any preservatives, flavourings, colourings, monosodium glutamate and chicken essence. This product is said to melt in the mouth instantly and retails in a 200g pack.

Claims:
No Additives/Preservatives, Babies & Toddlers (0-4), Time/Speed, Prebiotic

Boots Butterfly Pea Shampoo (Thailand)

Boots Butterfly Pea Shampoo is now available in a newly designed 600ml pack on a promotional "buy one get one free" offer. It has been specially formulated for black hair, and is enriched with: butterfly pea extract to help maintain the condition of hair; and wheat germ oil to smooth.

Claims:
Botanical/Herba

PZH Quhuang Whitening Whitening Kit (China)

PZH Quhuang Whitening Whitening Kit comprises the following: 1 x 15ml Cleansing Foam; 1 x 25ml Toner; and 1 x 5g Repair Cream. Cleansing Foam is formulated with a brightening ingredient called pientzehuang. Its rich foamy formula is claimed to effectively cleanse dirt, soften skin cells and unblock pores, whilst leaving skin white, luminous and healthy.

Claims:
Toning*, Whitening, Cleansing*

MH Food All-Purpose Vegetable Seasoning (Malaysia)

MH Food All-Purpose Vegetable Seasoning is extracted from fresh mushrooms, seaweed and vegetable and contains no MSG, preservatives, artificial colourings, flavourings or trans fat. This freeze dehydrated seasoning features vegetable flavour and is said to help add rich flavour to many dishes, including soups, meals and hot pots.

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

Source: Mintel (2013)

Innovative Green Peas Launches:
L3M (September-November 2013)

Nestlé Cerelac Fortified Baby Cereal with Milk and Wheat-Rice Mixed Veg (India)

Nestlé Cerelac Fortified Baby Cereal with Milk and Wheat-Rice Mixed Veg has been reformulated and now contains green peas. This is a complementary food for babies after six months when breast milk alone can no longer totally cover the baby's growing nutritional requirements.

Claims:
Ease of Use, No Additives/Preservatives, Vegetarian, Babies & Toddlers (0-4)

Simply Protein Chips Spicy Chili Kick Flavour Pea Protein Chips (Canada)

Simply Protein Chips Spicy Chili Kick Flavour Pea Protein Chips are described as a great snack packed with 25g of protein, 2g of sugar and only 140 calories per bag. This vegan and vegetarian product is a good source of iron, free from gluten, dairy, soy and preservatives, and is said to be perfect to take to school or work for a unique alternative to chips

Claims:
No Additives/Preservatives, Low/No/Reduced Allergen, Low/No/Reduced Calorie, High Protein, Vegan, Kosher, On-the-Go, Gluten-Free, No Animal Ingredients, Vegetarian

So Delicious Dairy Free Vanilla Flavoured Cultured Almond Milk (Canada)

So Delicious Dairy Free Vanilla Flavoured Cultured Almond Milk is now available. This vegan product is free from dairy, soy and gluten, kosher certified, and retails in a 454g recyclable pack.

Claims:
Low/No/Reduced Allergen, Kosher, Vegan, Ethical - Environmentally Friendly Package, Gluten-Free, No Animal Ingredients

Lifematrix Yellow Pea Protein Powder (South Africa)

Lifematrix Yellow Pea Protein Powder is made from GMO-free North American-grown peas. This unsweetened product contains 80% protein, is suitable for vegans and contains no gluten, soy or dairy. It has been kosher certified and retails in a 400g pack.

Claims:
Low/No/Reduced Allergen, GMO-Free, High Protein, Vegan, Kosher, Gluten-Free, No Animal Ingredients

Source: Mintel (2013)

Innovative Green Peas Launches:
L3M (September-November 2013)

Hillary Cereal & Nuggets Cereal (New Zealand)

Hillary Cereal & Nuggets Cereals is made with four grains and protein from three sources. The products is described as crunchy curls of rice, wheat, oats and corn, mixed with nuggets of multi-grain cereal with a chewy centre and fast metabolising milk protein.

Claims:
Ethical - Charity, High Protein, Social Media, Ethical - Environmentally Friendly Package

Ke-Le-Kuo Garlic Flavoured Pea Crackers (Taiwan)

Ke-Le-Kuo Garlic Flavoured Pea Crackers are now available in a limited edition pack featuring Open! Kids cartoon characters. This vegetarian product is sold exclusively at 7-Eleven stores.

Claims:
Vegetarian, Children (5-12), Limited Edition

Yu Quan Qing Yu Pin Golden Label Aged Vinegar (China)

Yu Quan Qing Yu Pin Jin Biao Chen Cu (Golden Label Aged Vinegar) is fermented slowly at high temperatures and processed using more than 10 production procedures. This vinegar is described as sweet, soft, smoky, sour and aromatic. The product retails in a 2L pack.

Claims:
N/A

Dick Van Patten's Natural Balance L.I.D. Sweet Potato & Bison Formula Dog Food (USA)

Dick Van Patten's Natural Balance L.I.D. Sweet Potato & Bison Formula Dog Food provides complete and balanced nutrition for all breeds, from puppies to adults and seniors. It is said to be scientifically formulated to improve the dog's skin and coat, to contain a protein that is nutrient dense, easily digestible and contains bison meat.

Claims:
No Additives/Preservatives, Low/No/Reduced Allergen, Low/No/Reduced Calorie, Low/No/Reduced Fat, Ethical - Environmentally Friendly Product, Ethical - Charity, Skin & Coat (Functional Pet)

Source: Mintel (2013)

Australian Green Peas Launches:
L3M (September-November 2013)

Simplee Soup in a Cup Pumpkin with Croutons Instant Soup

Simplee Soup in a Cup Pumpkin with Croutons Instant Soup has been reformulated and is now available with a new recipe. The 98.5% fat-free product requires only water to prepare and contains no added MSG, artificial colours or preservatives. The soup is suitable for vegetarians, provides a source of fibre and retails in a 115.5g pack with three 38.5g sachets

Claims:
No Additives/Preservatives, GMO-Free, Low/No/Reduced Fat, Time/Speed, Ease of Use, Vegetarian

San Remo La Pasta Oriental Flavour Risoni Pasta

San Remo La Pasta Oriental Flavour Risoni Pasta contains no added MSG and the pasta is made with durum wheat semolina. This microwavable product takes 12 minutes to cook and retails in a 110g pack, providing four servings.

Claims:
No Additives/Preservatives, Microwaveable

San Remo La Pasta Chicken Flavour Risoni Pasta

San Remo La Pasta Chicken Flavour Risoni Pasta has no added MSG and the pasta is made with durum wheat semolina. This microwavable product takes 12 minutes to cook and retails in a 110g pack, which provides four side serves.

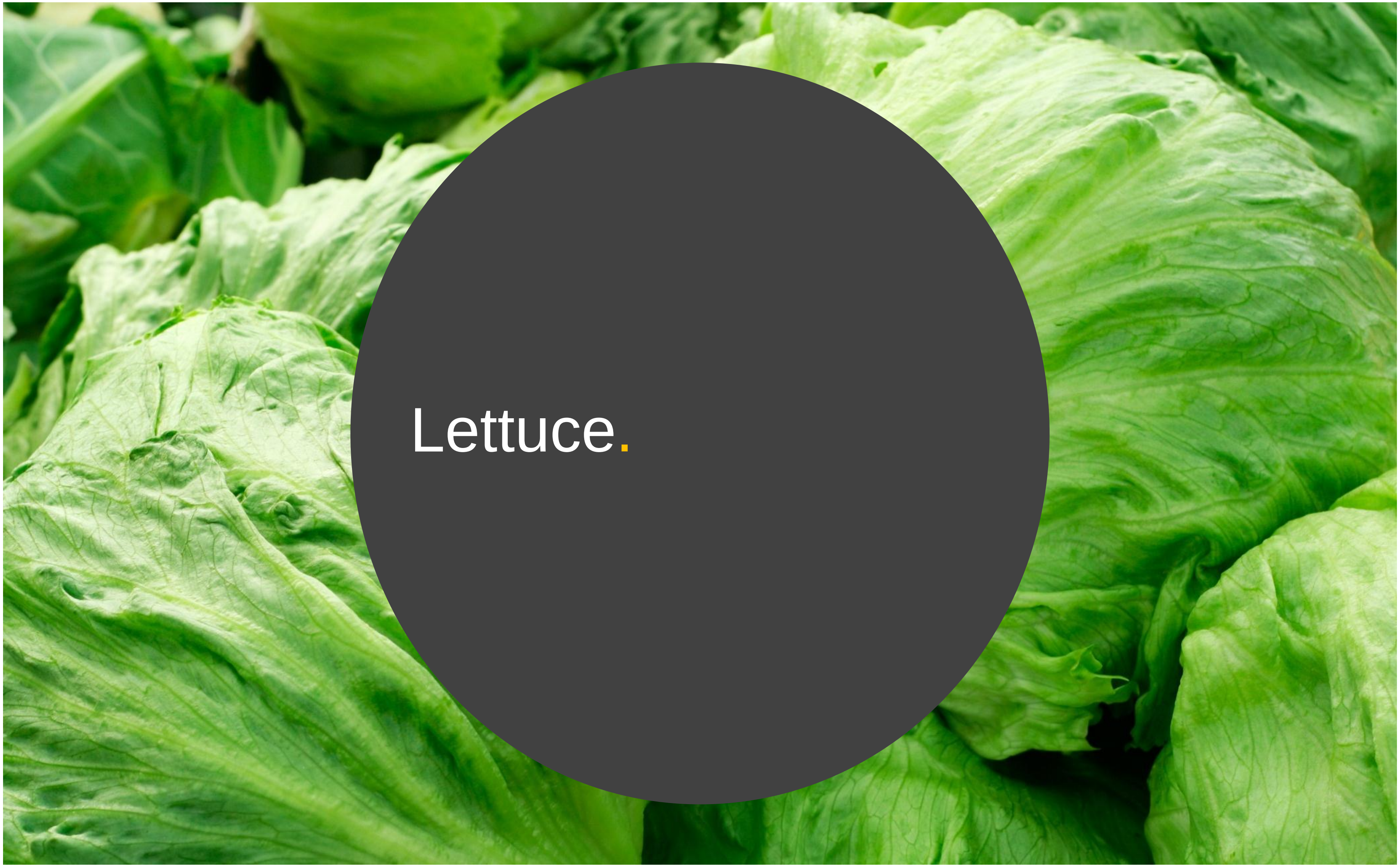
Claims:
No Additives/Preservatives, Microwaveable

McCain Healthy Choice Basil Pesto Chicken

McCain Healthy Choice Basil Pesto Chicken is described as an Italian inspired farfalle pasta with creamy basil pesto sauce, juicy chicken breast and seasonal vegetables, steamed to perfection. The meal is 97% fat free, low in cholesterol and free of artificial colour and flavours. The product retails in a 350g microwaveable steam fresh bag.

Claims:
No Additives/Preservatives, Low/No/Reduced Cholesterol, Low/No/Reduced Fat, Microwaveable

Source: Mintel (2013)


Lettuce.

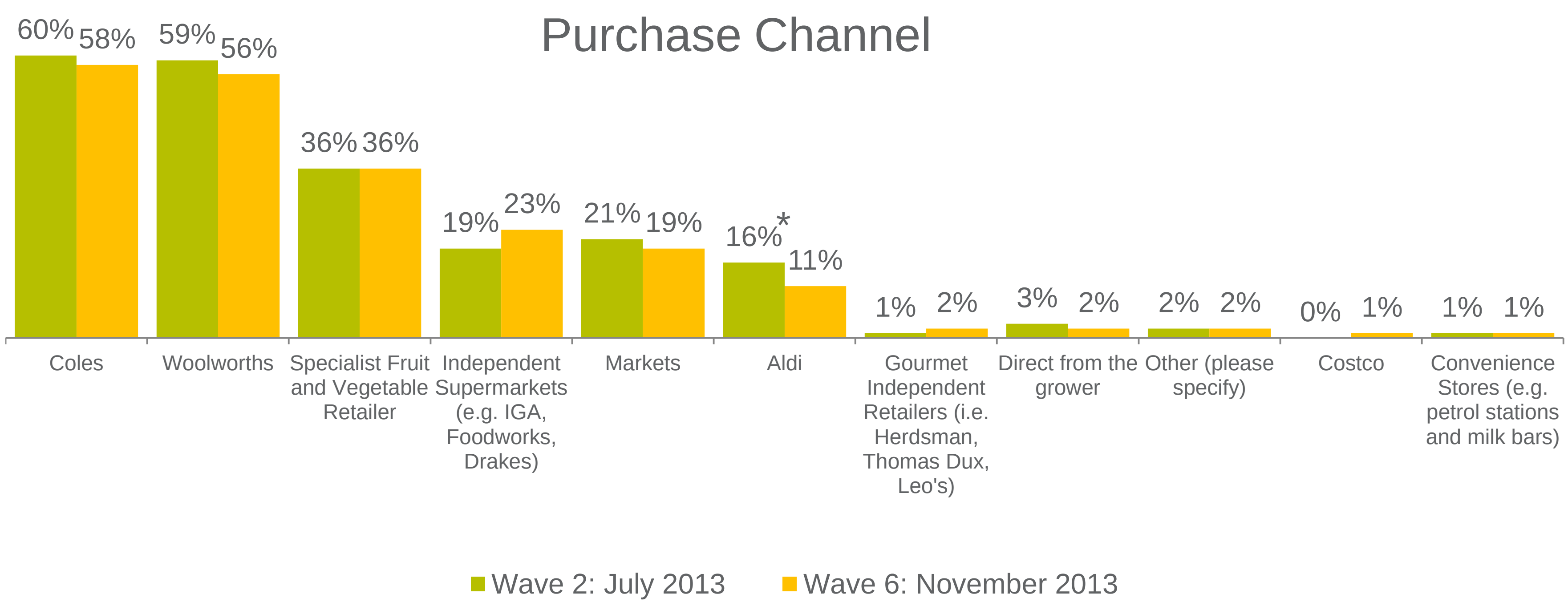
Purchase and Consumption Behaviour

Lettuce

Average Purchase **4.9** times per month (cf. 4.5 times per month Wave 2)

Average Consumption **14.7*** times per month (cf. 13.6 times per month Wave 2)

- Consumption frequency was significantly higher compared with Wave 2.
- Purchase of lettuce from Aldi had significantly decreased compared with Wave 2.
- Other channels were on par between Waves, with mainstream retail channels remaining the common location for purchase.



Q1. On average, how often do you purchase <commodity> ?
Q2. On average, how often do you consume <commodity>?
Q5. From which of the following channels do you typically purchase <commodity> ?
Sample Wave 2 N=512, Wave 6 N=370
* Indicates significantly higher score between Waves at 95% CI

colmar brunton.

Average Spend & Price Sensitivity
Lettuce

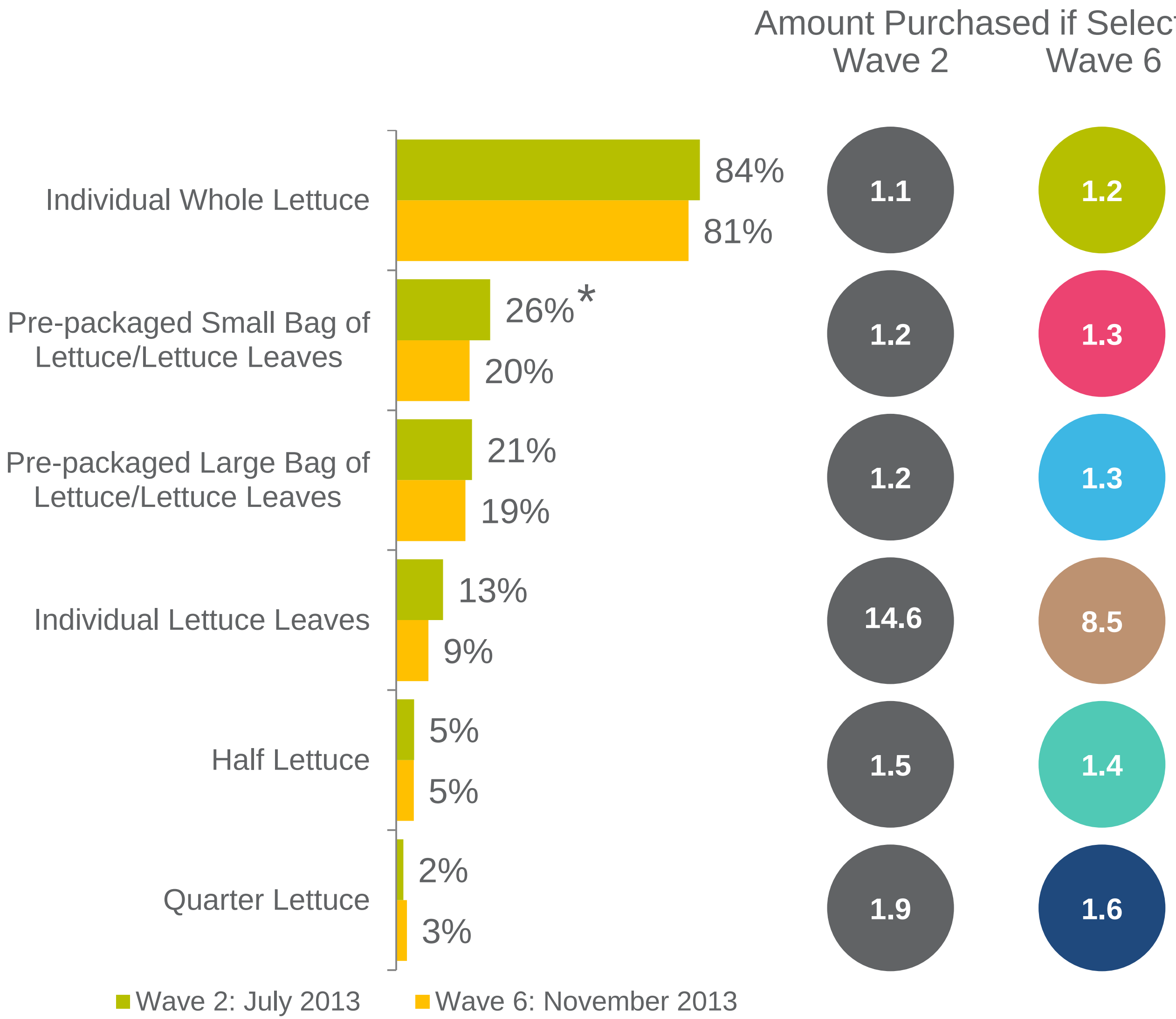
- The average consumer typically purchased **700g** of Lettuce in November, slightly less than July (800g).

- The average recalled last spend on Lettuce was **$3.47** in November, 40 cents higher than Wave 2.

- Consumers perceived the average price for Lettuce as good value for money **(6.0/10)**, in line with Wave 2 (6.1/10).

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

Pack Formats Purchased
Lettuce

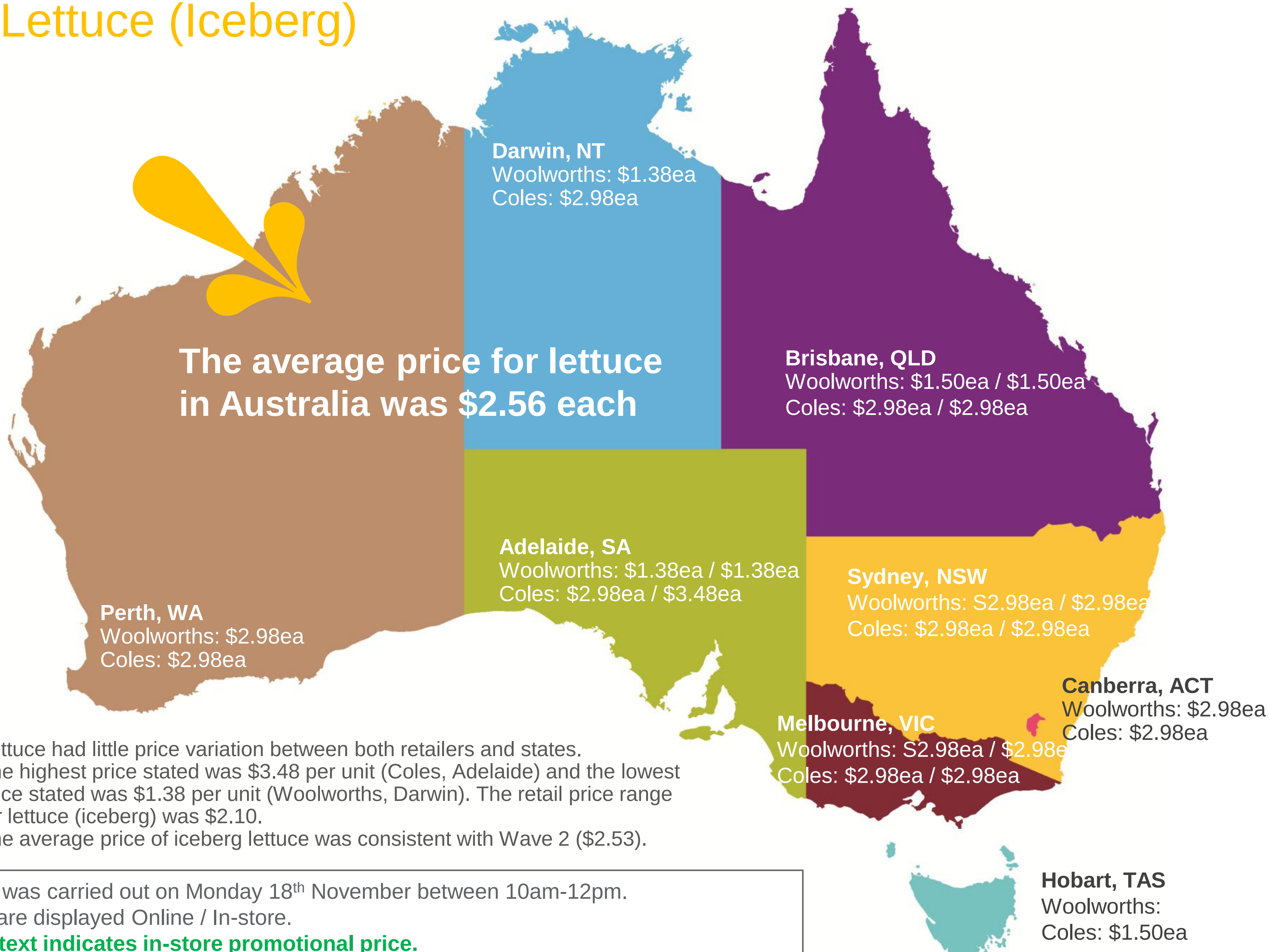


- Compared with Wave 2, respondents were significantly less likely to purchase small bag of lettuce/lettuce leaves.
- Although not significant, respondents were less likely to purchase individual lettuce leaves, and also decrease the number purchased in one shop.
- Other lettuce formats were on trend between waves.

Q3a. How much <commodity> does this typically equate to?
Sample Wave 2 N=512, Wave 6 N=370
* Indicates significantly higher score between Waves at 95% CI

Online and In-store Commodity Prices

Lettuce (Iceberg)

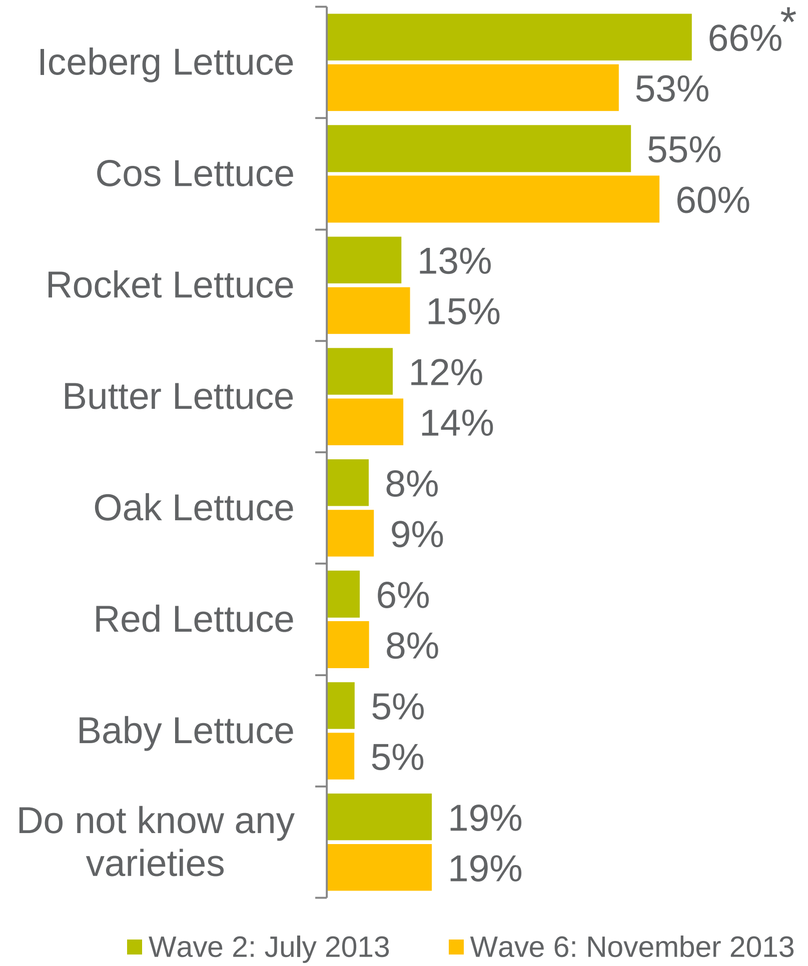


- Lettuce had little price variation between both retailers and states.
- The highest price stated was $3.48 per unit (Coles, Adelaide) and the lowest price stated was $1.38 per unit (Woolworths, Darwin). The retail price range for lettuce (iceberg) was $2.10.
- The average price of iceberg lettuce was consistent with Wave 2 ($2.53).

Pricing was carried out on Monday 18th November between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates in-store promotional price.

Spontaneous Varietal Awareness & Purchase
Lettuce

- Overall spontaneous awareness of lettuce types was consistent between Waves, with 19% of respondents unable to recall a type of lettuce.
- There was a significant decrease in awareness of iceberg lettuce (13%).



Sample Wave 2 N=512, Wave 6 N=370
* Indicates significantly higher score between Waves at 95% CI
Q6a. What varieties of <commodity> are you aware of? (unprompted)

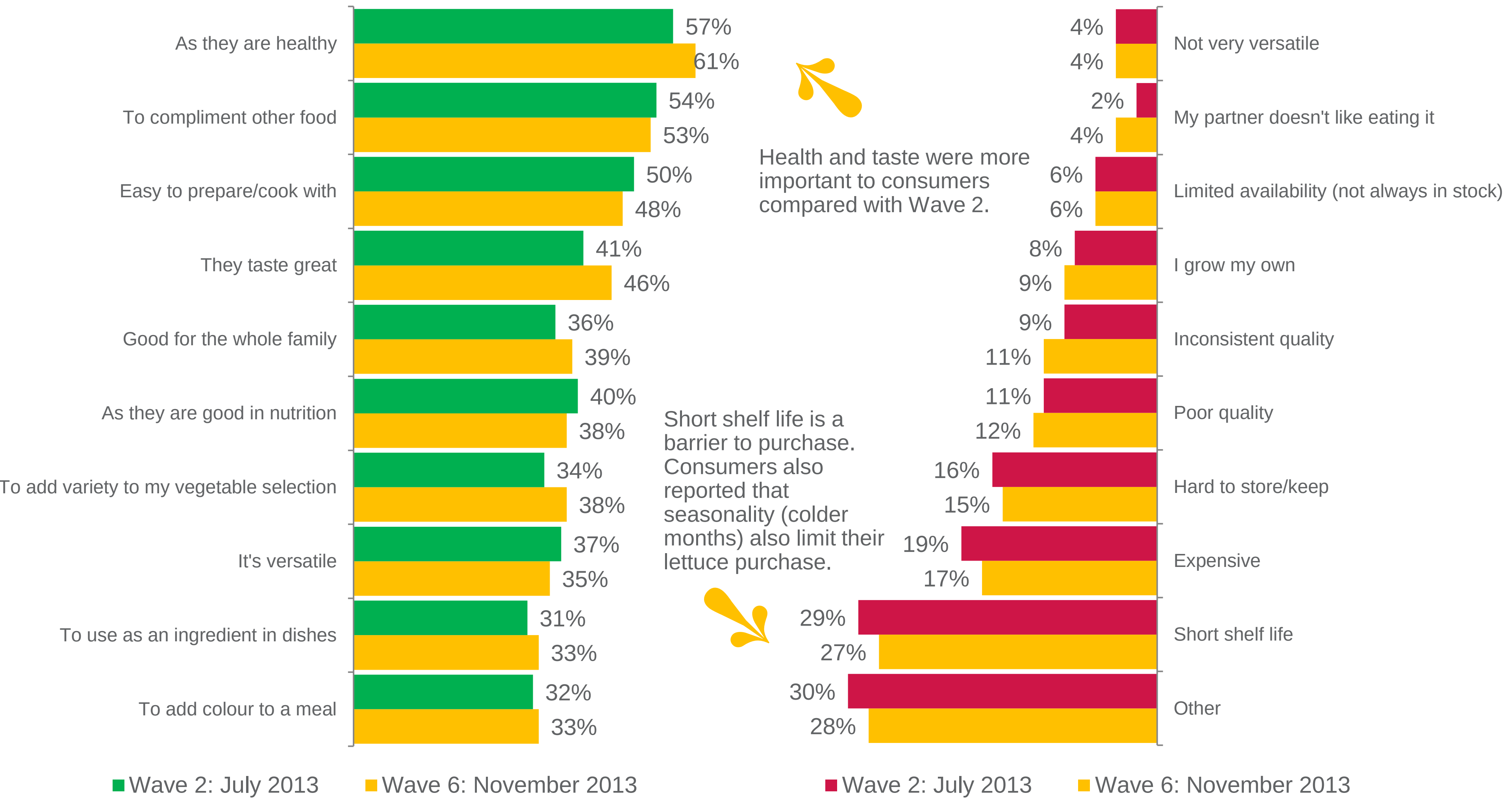
colmar brunton.

Triggers & Barriers to Purchase

Lettuce

Triggers

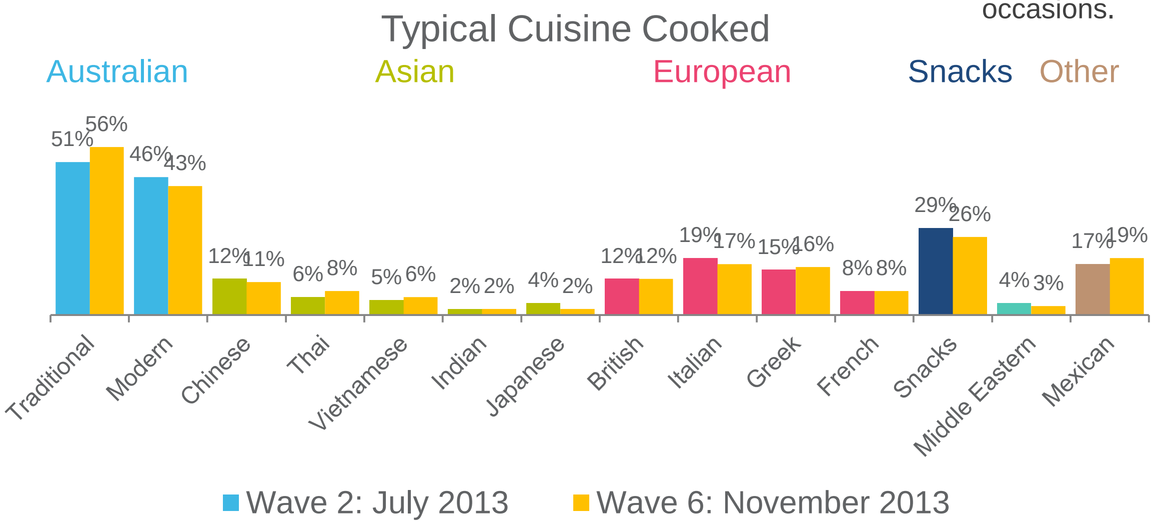
Barriers

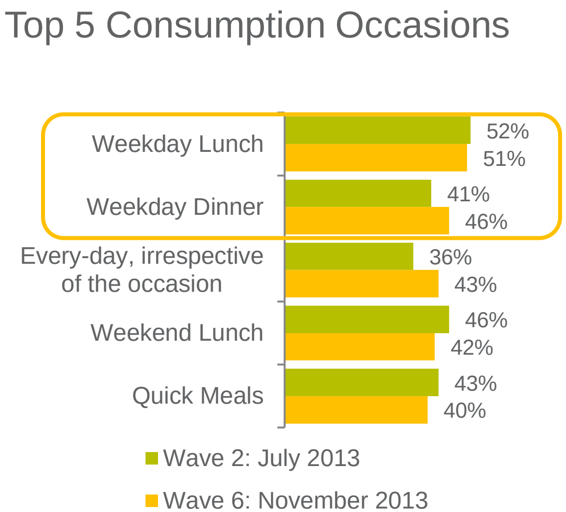


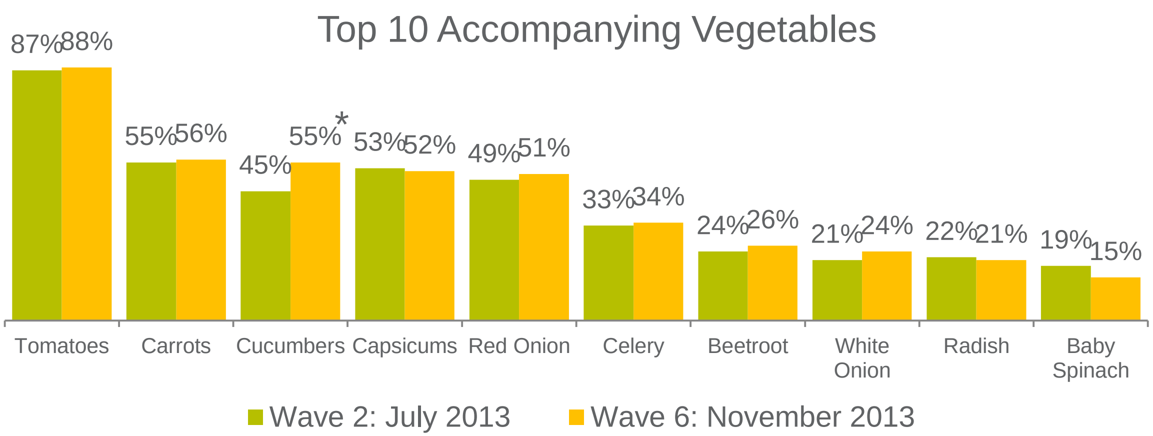
Sample Wave 2 N=512, Wave 6 N=370
* Indicates significantly higher score between Waves at 95% CI
Q7. Which of the following reasons best describes why you purchase <commodity> ?
Q8. Which reason best describes why you don't buy <commodity> more often?

Cooking Preferences & Occasions: Lettuce

- Cooking cuisines were on trend with Wave 2, with Australian cuisine the most cooked by respondents.
- There was a significant increase in accompanying cucumbers, additional increased consumption of lettuce raw, which may indicate greater use in salads and prompted by change in seasonality between waves.
- Weekday lunch and dinners were the main consumption occasions.







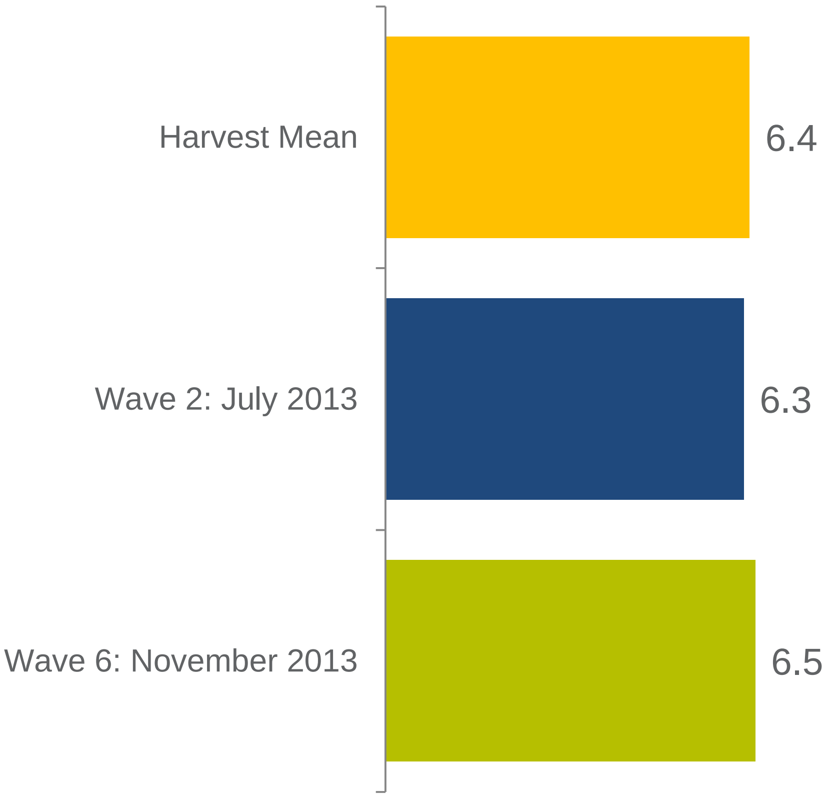
Top 10 Cooking Styles

	Wave 2	Wave 6
Raw	71%	74%
Other	23%	21%
Stir frying	6%	5%
Blend	3%	1%
Steaming	2%	2%
Sun/Air Drying	2%	1%
Soup	2%	3%
Roasting	1%	0%
Shallow Frying	1%	1%
Grilling	1%	1%

Sample Wave 2 N=512, Wave 6 N=370
* Indicates significantly higher score between Waves at 95% CI
Q9. How do you typically cook <commodity> ?
Q10. What cuisines do you cook/consume that use <commodity> ?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
Q11. Which of the following occasions do you typically consume/use <commodity> ?

Importance of Provenance

- Importance of lettuce provenance has slightly increased since Wave 2, this is still on trend with Harvest mean.



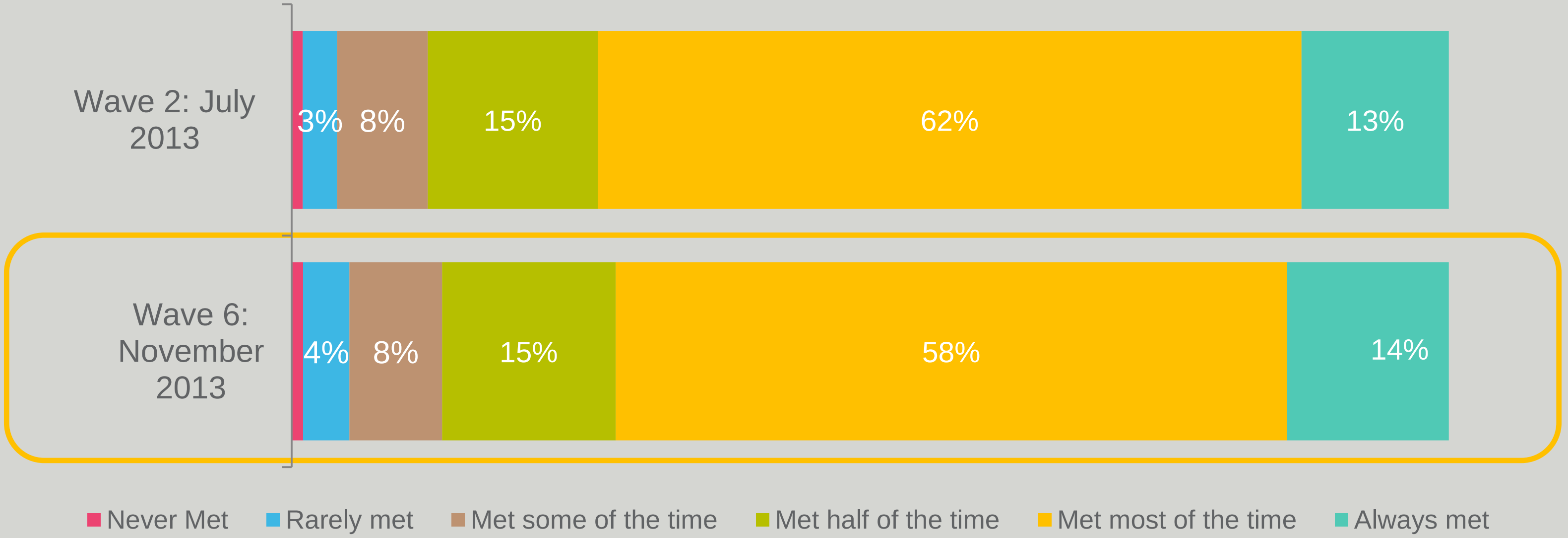
Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 2 N=512, Wave 6 N=370
* Indicates significantly higher score between Waves at 95% CI

Freshness and Longevity: Lettuce

Expected to stay fresh for **7.0** days (cf. 7.6 days Wave 2)

- Expectations and longevity of freshness had slightly decreased since Wave 2.
- Expectations of this freshness being met was on par with Wave 2, with 72% of respondents indicated that expectations were met at least most of the time.

Expectations Met



Sample Wave 2 N=512, Wave 6 N=370
* Indicates significantly higher score between Waves at 95% CI
Q12. How long do you expect <commodity> to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy <commodity> ?

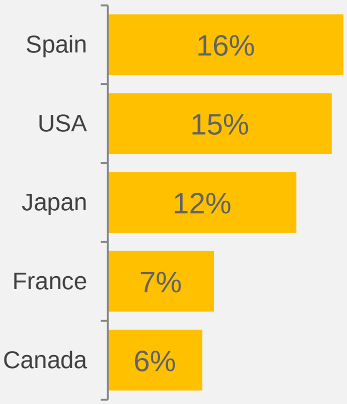
Trends: Lettuce

Lettuce Global NPDs

September-November 2013

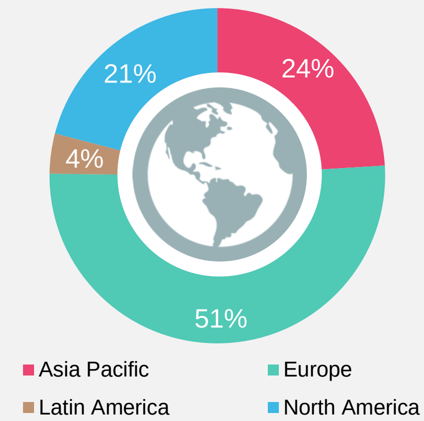
There were 129 new products launched in the last 3 months globally containing lettuce as an ingredient. Over half of these launches occurred in Europe. The top categories for launches were meals and fruit and vegetables.

Country

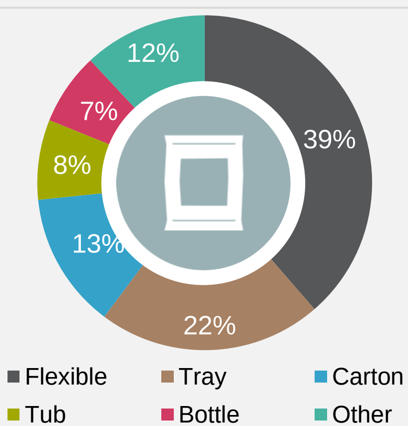


129 Global NPDs

Region



Top Pack Formats



Categories

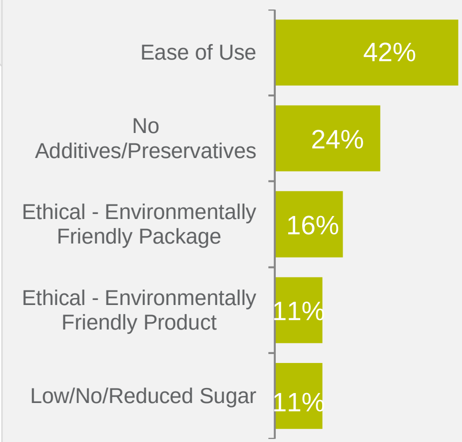
Meals 49%

Fruit & Vegetables 27%

Juice Drinks 16%

Processed Products 2%

Top Claims



Lettuce Product Launches:
Last 3 Months (September-November 2013)
Summary

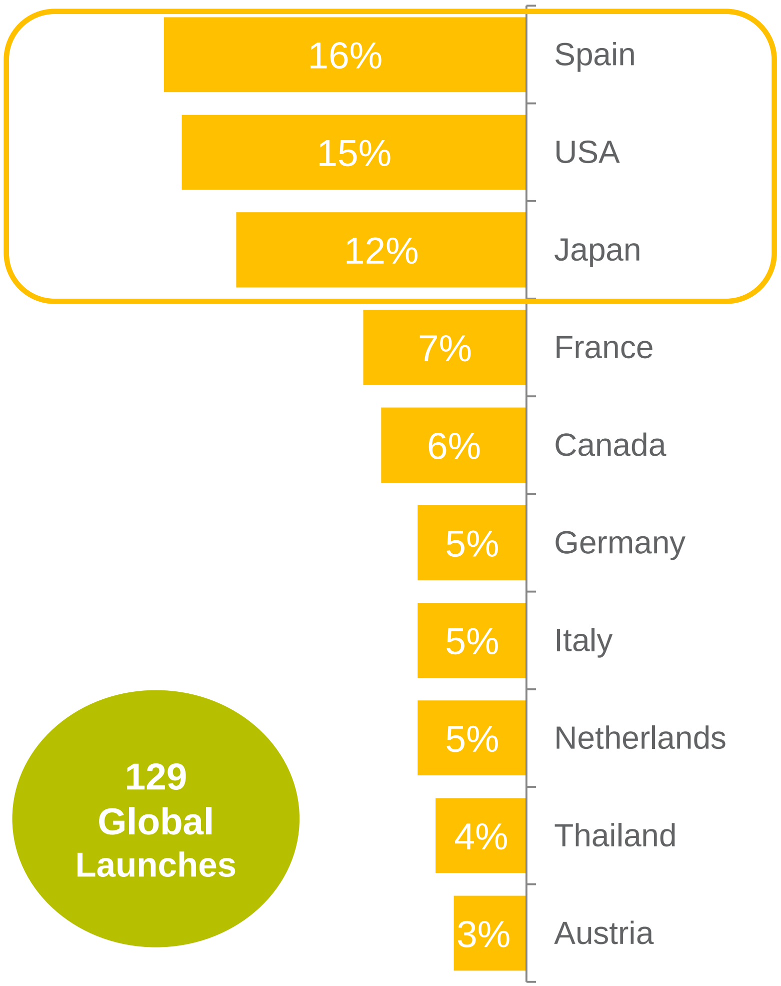
- There were 129 launches of products containing lettuce as an ingredient globally in the last 3 months. This was consistent with 141 launches in Wave 2.
- There was only one lettuce product launched in Australia in the last 3 months.
- The majority of products launched in the last 3 months were in Europe (51%).
- Flexible & tray packaging were the top packs formats used, 39% and 22% respectively.
- The top categories for launches were meals (49%), fruit and vegetables (27%) and juice drinks (16%). These categories were consistent with products launched between April and June 2013.
- The core claims used for launches globally were ease of use (42%), and ethical claims, such as environmentally friendly packaging (16%) and environmentally friendly products (11%).
- The most innovative launches found were green super food dietary supplements, morning salad drinks and a purifying supplement. Examples of these can be found over the next slides.

Source: Mintel (2013)

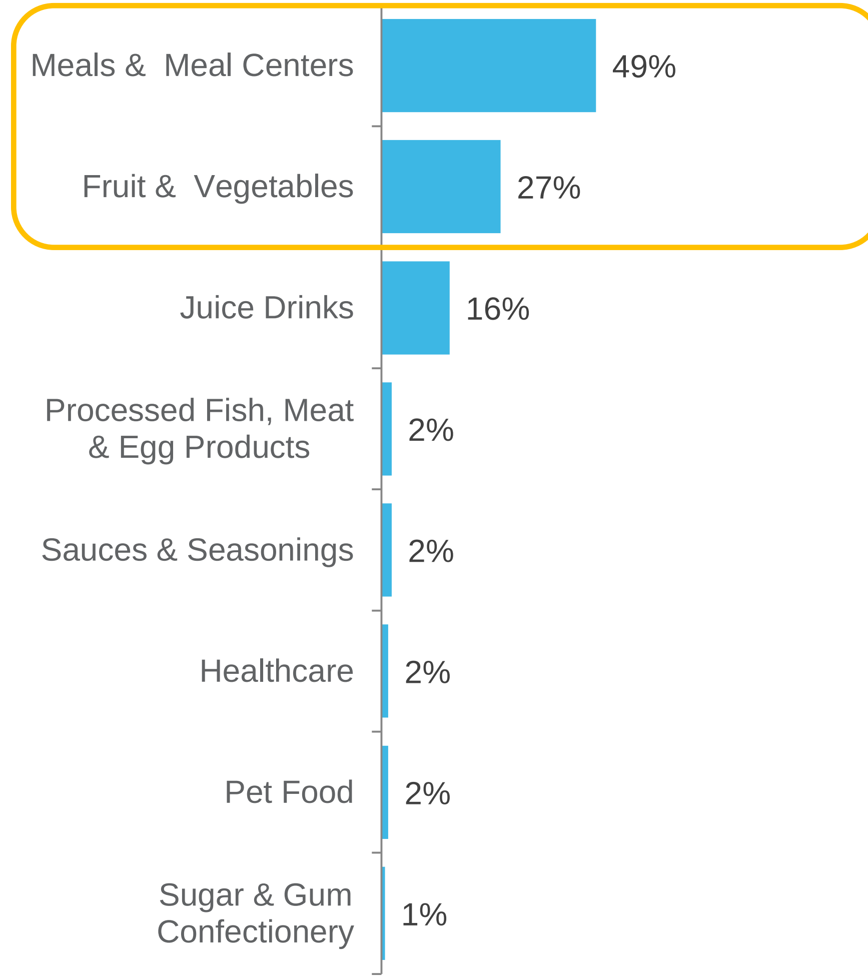
Lettuce SKUs
Country, Region & Categories

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

Top Launch Countries



Top Launch Categories



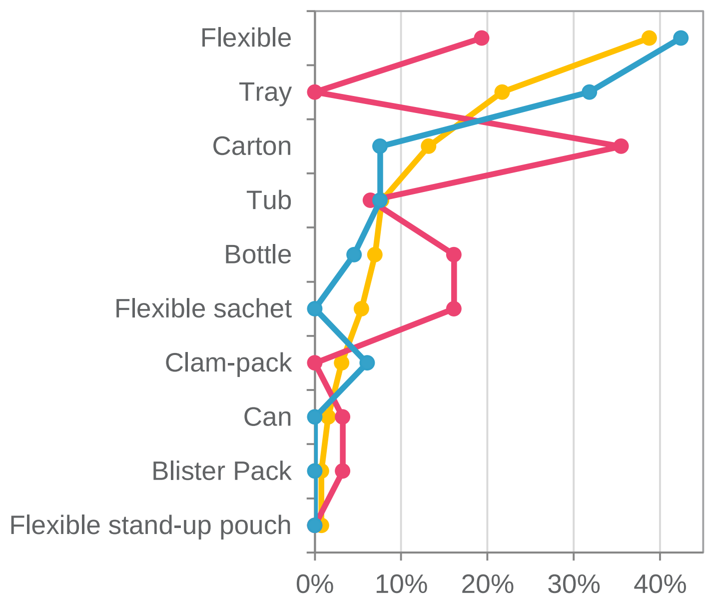
Number of Global Lettuce NPDs for the L3M N=129

Lettuce SKUs

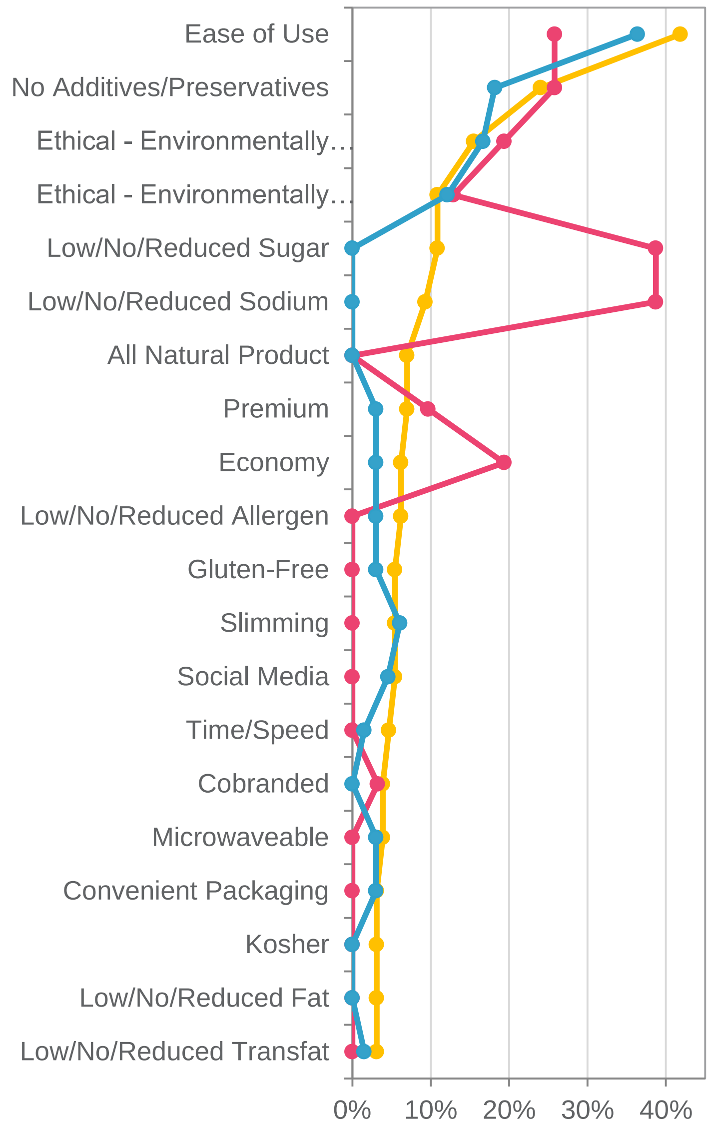
Top Claims & Pack Formats Used

- Ease of use and no additives/preservatives were the top claims globally in the last 3 months. Low sugar and low sodium claims were popular in Asia Pacific.
- Flexible packaging was the most common pack format globally, followed by trays. Cartons were popular in Asia Pacific.

Top Pack Format



Top Claims Launched



Number of Global Lettuce NPDs for the L3M N=129
Only regions with n >30 are displayed

Innovative Lettuce Launches:
L3M (September-November 2013)

Kagome Yasai Seikatsu 100 Niagara Mix Juice (Japan)

Kagome Yasai Seikatsu 100 Niagara Mix Juice has been repackaged. The seasonal product features Niagara grapes from Shinshu, and is from sodium, sugar and preservatives. It is made with 21 vegetables and three fruits. The product retails in a 200ml carton pack. Launched on September 17, 2013.

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

SunRype Fruit Plus Veggies Juice Variety Pack (Canada)

SunRype Fruit Plus Veggies Juice Variety Pack has been reformulated and now comes with added fibre. The pack comprises 15 packs of Strawberry Banana, 15 packs of Raspberry Orange and 10 packs of Tangerine Kiwi. These 100% juices are said to be a blend of fruit and vegetable juices and puree from concentrate with citric acid, natural flavour and vitamin C.

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

Ricardo Fuentes e Hijos Salazones El Auténtico Tapeo Mediterráneo Atún Ahumado (Spain)

Ricardo Fuentes e Hijos Salazones El Auténtico Tapeo Mediterráneo Atún Ahumado (Smoked Tuna) is part of a new range that features authentic Mediterranean flavours. This sea-caught product represents a quick way to enjoy Mediterranean flavours, and retails in a 0.050kg pack.

Claims:
Time/Speed

Amazing Grass Raw Reserve Green Superfood Dietary Supplement (Finland)

Amazing Grass Raw Reserve Green Superfood Dietary Supplement is made with E3Live and contains 25 billion probiotics per serving. This vegan product contains no gluten and has been EU Leaf, CCOF and USDA organic certified. It is recommended to be mixed with water, juice or smoothies and retails in an 8g pack.

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

Source: Mintel (2013)

Innovative Lettuce Launches:
L3M (September-November 2013)

Pigeon Brand Acrid Sweet Pickles (Hong Kong)

Pigeon Brand Acrid Sweet Pickles are now available. The product retails in a 140g pack.

Claims:
N/A

Nishio Foods Fried Tofu with Vegetable Filling (China)

Nishio Foods Shu Cai Dou Fu Bao (Fried Tofu with Vegetable Filling) is QS certified. The product retails in a 105g pack containing three units.

Claims:
N/A

Forté Pharma Turbo Draine Burning, Draining & Purifying Supplement (France)

Forté Pharma Turbo Draine Aide à Brûler, Drainer, Purifier, Goût Thé Vert Pêche (Burning, Draining & Purifying Supplement with Green Tea & Peach Flavour) features a new reinforced concentrated formula, which is said to provide more than 80% of satisfaction. This is a sweetened dietary supplement which is claimed to help burn, drain and purify, thanks to the natural active ingredients it contains: green tea, meadowsweet and hibiscus.

Claims:
Low/No/Reduced Allergen, GMO-Free, Botanical/Herbal, Slimming, Ease of Use, Gluten-Free, No Animal Ingredients, Digestive (Functional)

Fujiya Pop Candy Ito En Jujitsu Yasai Vegetable & Fruit Lollipop (Japan)

Fujiya Pop Candy Ito En Jyujitsu Yasai Yasai to Kudamono (Vegetable & Fruit Lollipop) is a new cobranded product. It was created in collaboration with Ito En and recreates the taste of Ito En's Jyujitsu Yasai drink. It has a fruity taste that is easy to eat and contains green tea polyphenols and dietary fiber. The product retails in a 18 count pack.

Claims:
Cobranded, High/Added Fiber, Other (Functional)

Source: Mintel (2013)

Innovative Lettuce Launches:
L3M (September-November 2013)

Kikkoman Del Monte Morning Salad Drink (Japan)

Kikkoman Del Monte Morning Salad Drink features apple flavour and is said to contain 120g vegetables. This product retails in a 900g pack. Launched on June 24, 2013 with a RRP of 347 yen.

Claims:
Cobranded, Low/No/Reduced Sodium, Low/No/Reduced Calorie

Ito En Jujitsu Yasai Premium Additive-Free Vegetable Juice (Japan)

Ito En Jujitsu Yasai Premium Mutenka (Premium Additive-Free Vegetable Juice) combines 30 types of vegetables and 5 types of fruit. It is free from added sugar, sodium, flavouring and preservatives. The product retails in a 265g PET bottle. Launched on September 23, 2013 with an RRP of 158 yen.

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

Monterey Farms ArtiHearts Buffalo Flavoured Fresh Spicy Artichokes (USA)

Monterey Farms ArtiHearts Buffalo Flavoured Fresh Spicy Artichokes are fresh and ready-to-eat artichoke hearts, which have been carefully hand selected and prepared. They can be served steamed, sautéed, baked, and braised, or used for a quick and delicious treat. These microwavable artichokes are made with all natural ingredients and contain no preservatives.

Claims:
No Additives/Preservatives, All Natural Product, Low/No/Reduced Allergen, Vegan, Time/Speed, Microwaveable, Ease of Use, Gluten-Free, No Animal Ingredients

Edulis Caesar Salad (Spain)

Edulis Ensalada César (Caesar Salad) is a ready washed and to eat salad. The product retails in a 200g pack containing a dressing sachet and a fork.

Claims:
Ease of Use

Source: Mintel (2013)

Australian Lettuce Launch:
L3M (September-November 2013)

Coles Moroccan Salad Kit

Coles Moroccan Salad Kit is ready to mix and serve. It comprises crisp, crunchy leaves with nutty toasted chickpeas and sweet sultanas with a spicy harissa dressing. This hot salad contains no artificial colours or flavours, and retails in a 315g pack.

Claims:
Ease of Use, No Additives/Preservatives

Source: Mintel (2013)

Sweet Corn.

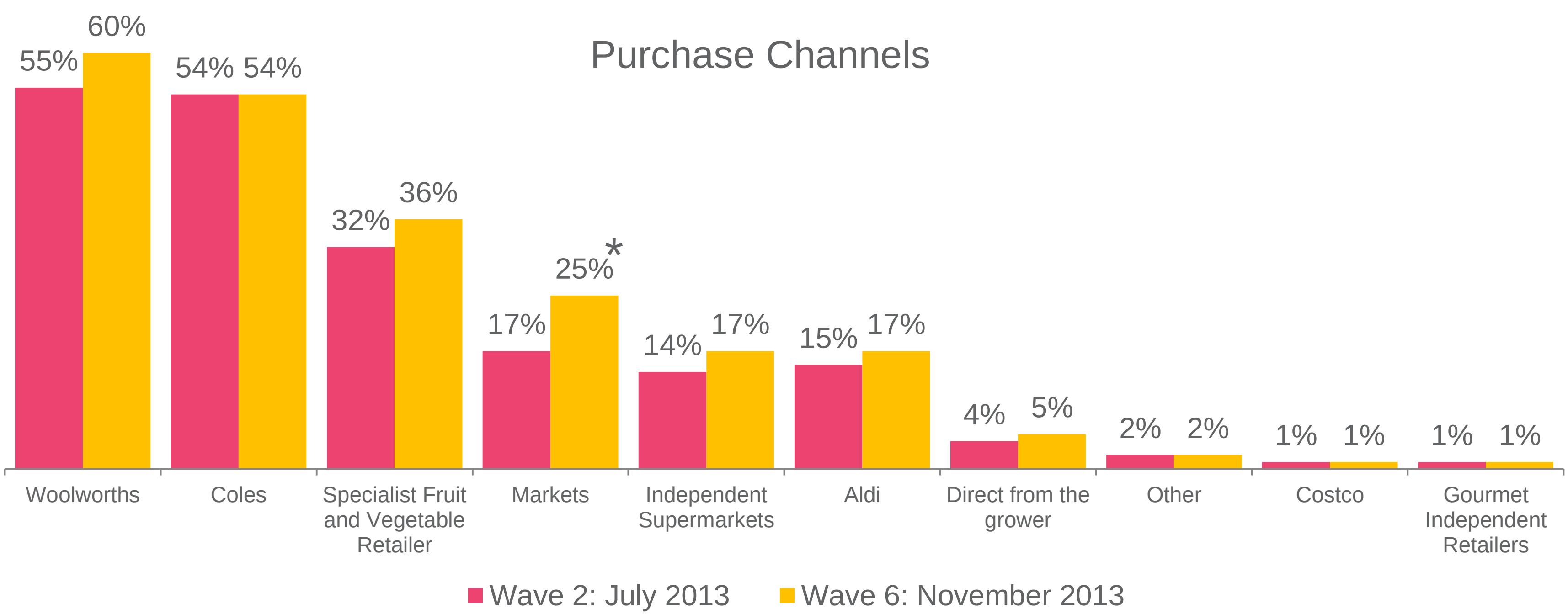
Purchase and Consumption Behaviour

Sweet Corn

Average Purchase **3.6** times per month (cf. 3.3 times per month Wave 2)

Average Consumption **6.5** times per month (cf. 5.9 times per month Wave 2)

- There was a significant increase in purchase of sweet corn from markets, which may be due to greater availability and seasonality.
- Purchase frequency was on par with Wave 2. Although not significant, there was a trend towards increased consumption.



Q1. On average, how often do you purchase <commodity>?
Q2. On average, how often do you consume <commodity>?
Q5. From which of the following channels do you typically purchase <commodity>?
Sample Wave 2 N=509, Wave 6 N=324
* Indicates significantly higher score between Waves at 95% CI

colmar brunton.

Average Spend & Price Sensitivity
Sweet Corn

⇛ The average consumer typically purchases **900g** of sweet corn in November, a slight increase from July (800g).

⇛ The average recalled last spend on Sweet Corn was **$3.92** in November, an increase from $3.55 in July**.**

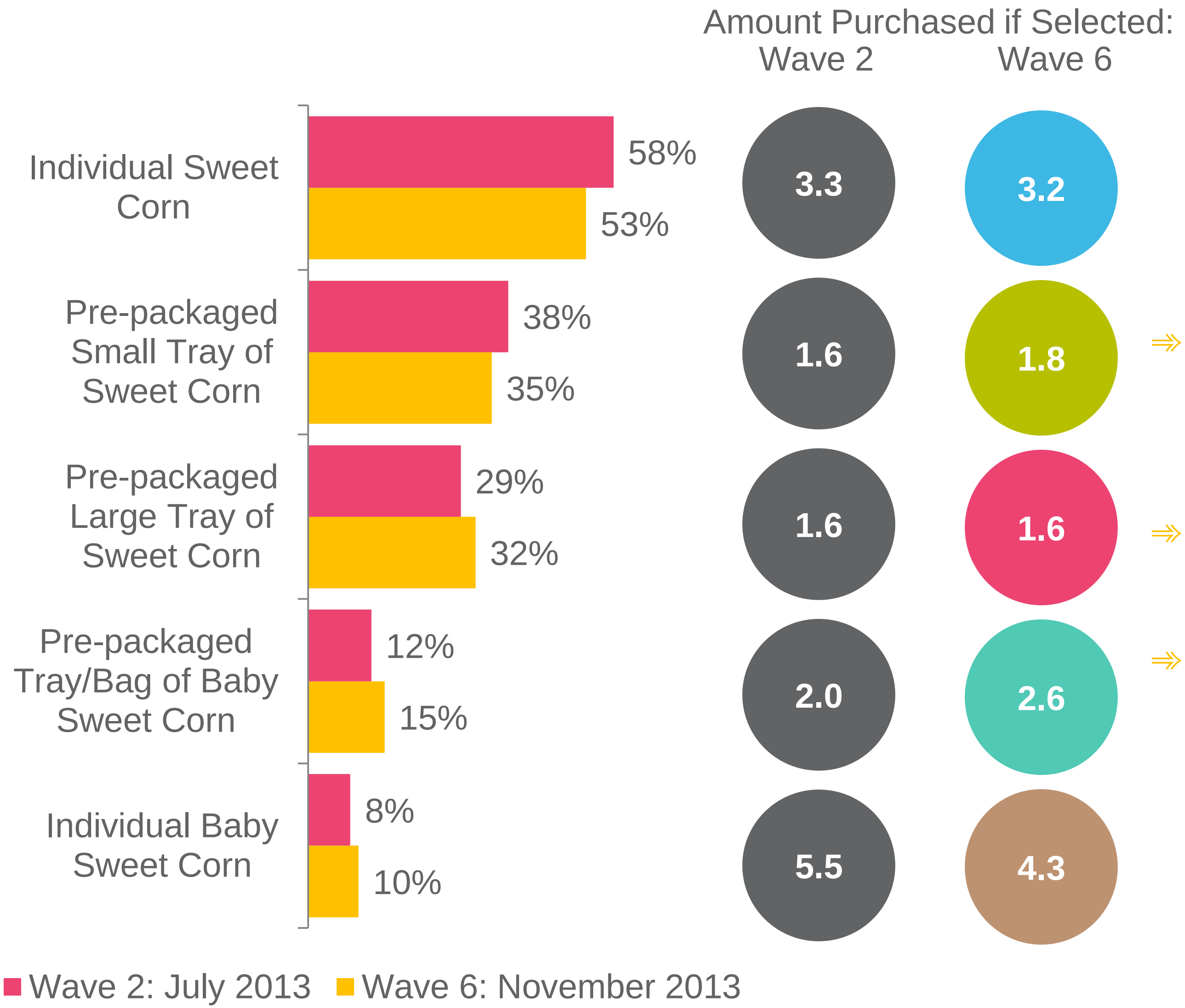
⇛ Consumers perceived the average price for Sweet Corn as good value for money **(6.5/10)** in November, which is unchanged from July**.**

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

colmar brunton.

Pack Formats Purchased

Sweet Corn

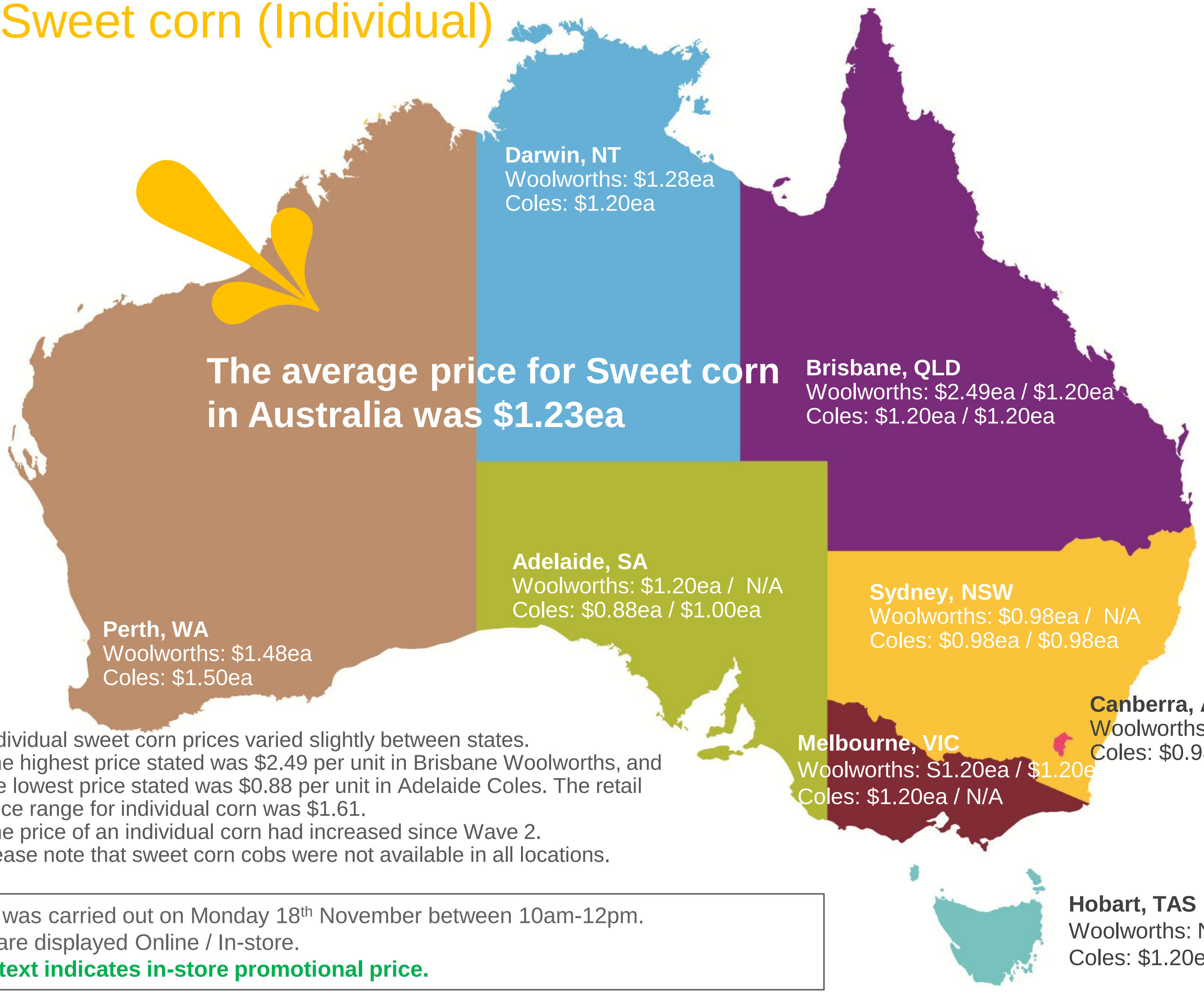


- Individual sweet corn remained the most common format purchased, on average 3 cobs of corn were purchased.
- There was a decrease in the number of baby corn purchased.
- Other sweet corn formats and amounts purchased were on trend with Wave 2.

Q3a. How much <commodity> does this typically equate to?
Sample Wave 2 N=509, Wave 6 N=324
* Indicates significantly higher score between Waves at 95% CI

Online and In-store Commodity Prices

Sweet corn (Individual)



- Individual sweet corn prices varied slightly between states.
- The highest price stated was $2.49 per unit in Brisbane Woolworths, and the lowest price stated was $0.88 per unit in Adelaide Coles. The retail price range for individual corn was $1.61.
- The price of an individual corn had increased since Wave 2.

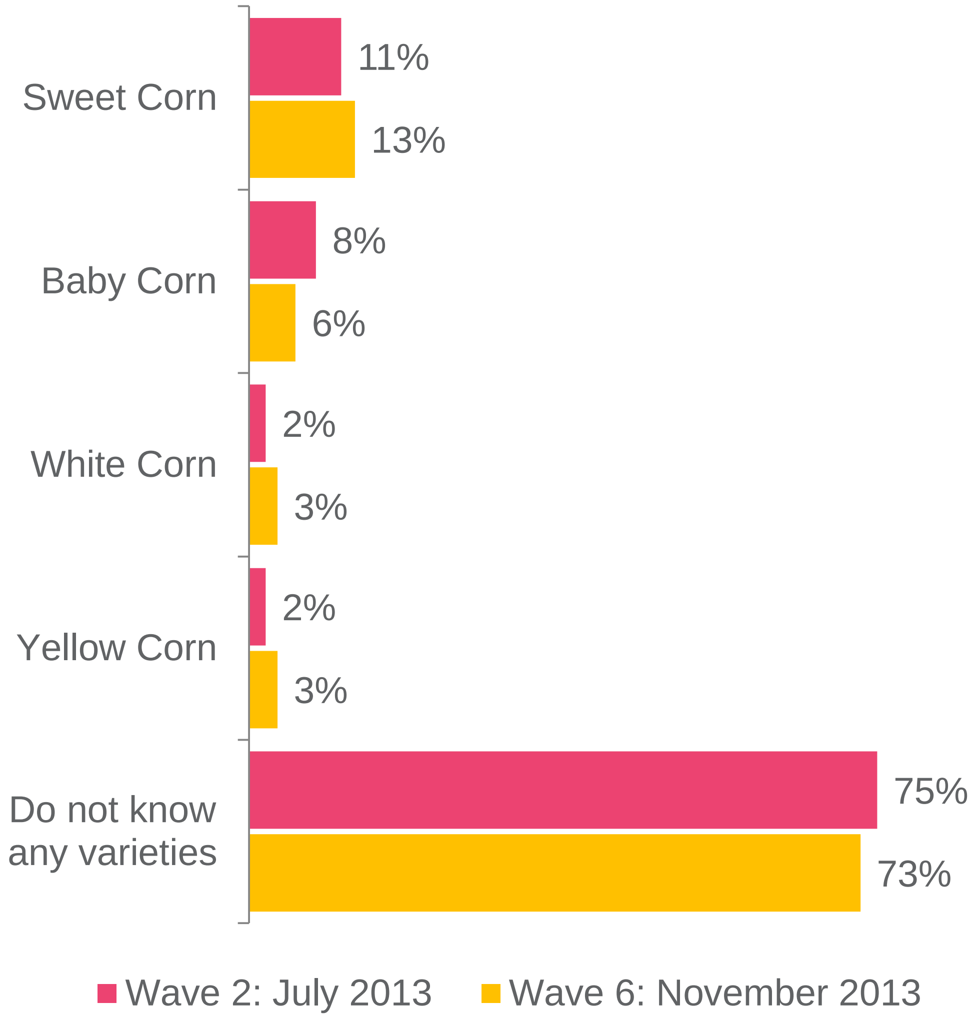
Please note that sweet corn cobs were not available in all locations.

Pricing was carried out on Monday 18th November between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates in-store promotional price.

Spontaneous Varietal Awareness & Purchase

Sweet Corn

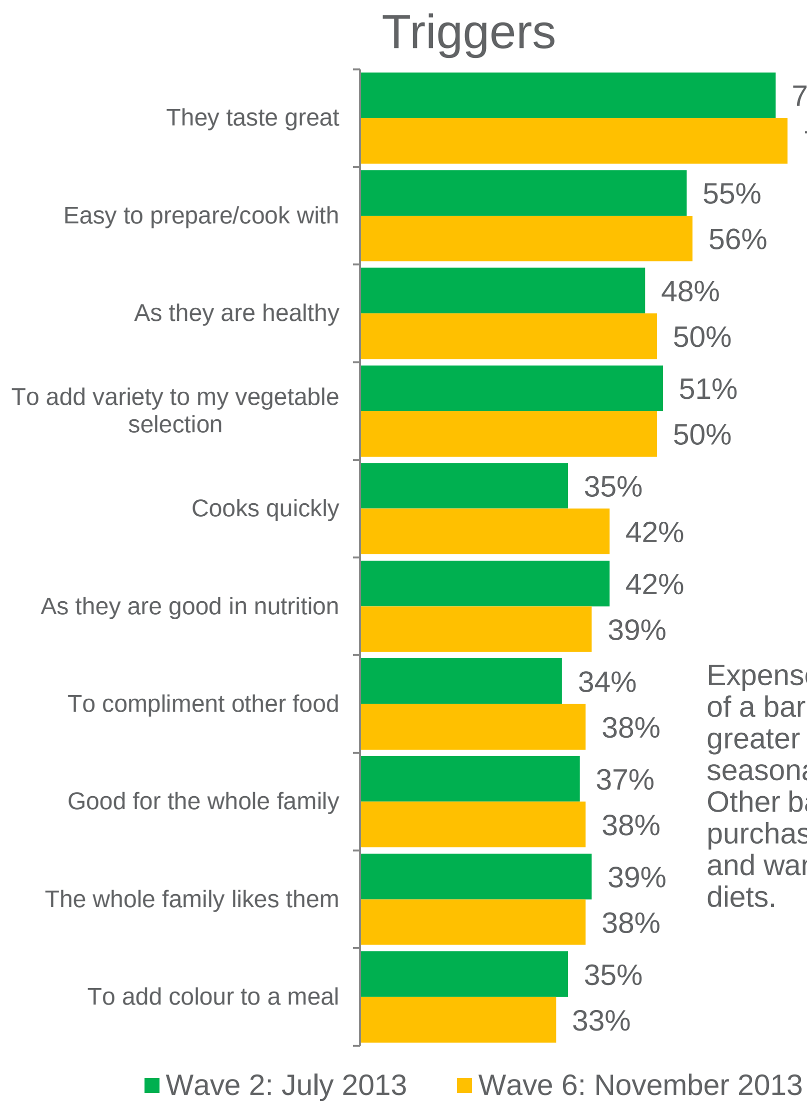
- Overall, awareness of sweet corn types were low and relatively unchanged compared with Wave 2.
- ‘Sweet Corn’ had the greatest recall as a type of corn.
- This could spell opportunity for higher uptake across the corn category as a whole, particularly if different varieties meet different needs and tastes better than others.



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

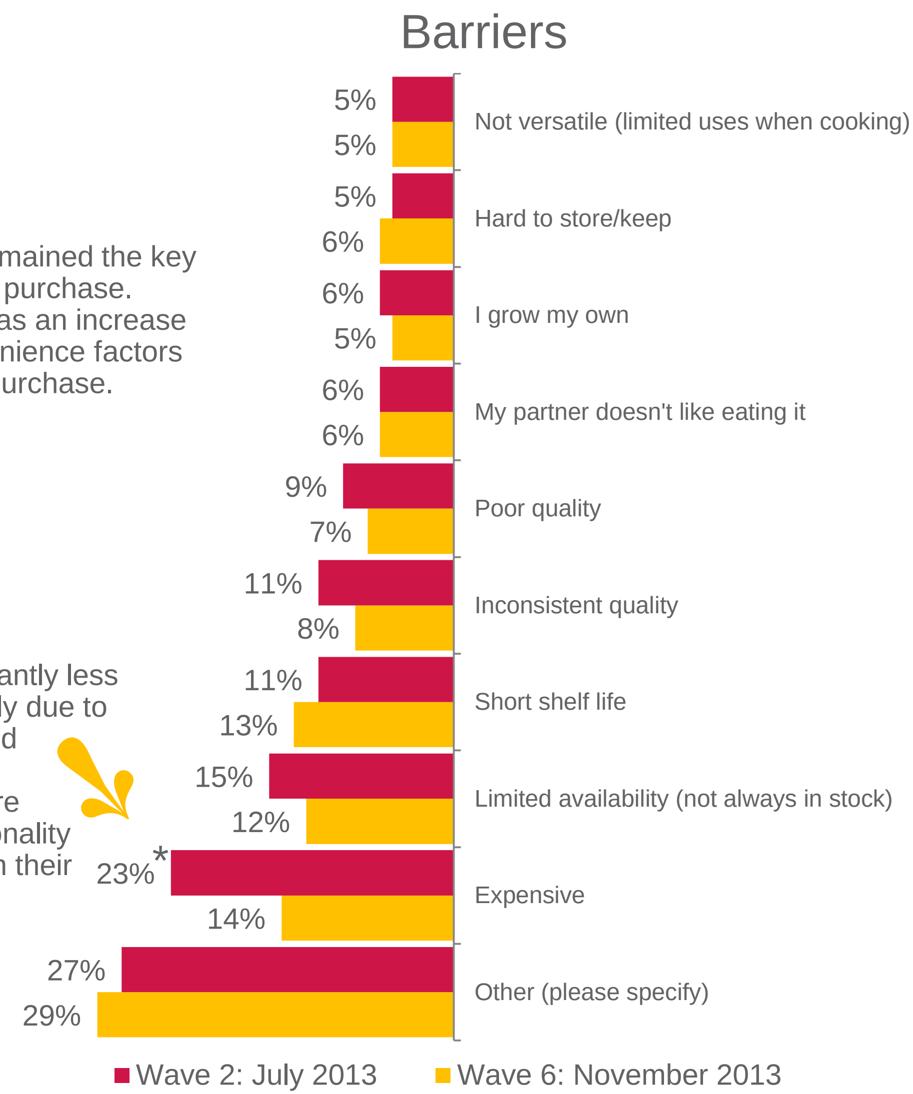
Triggers & Barriers to Purchase

Sweet Corn



Taste remained the key driver of purchase. There was an increase in convenience factors driving purchase.

Expense was significantly less of a barrier, most likely due to greater availability and seasonality.
Other barriers to future purchase were seasonality and wanting variety in their diets.



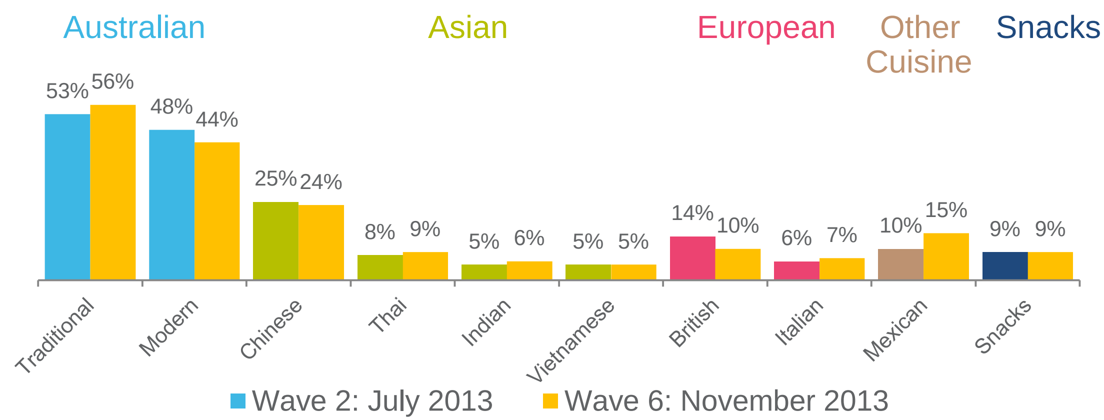
Q7. Which of the following reasons best describes why you purchase <commodity>?
Q8. Which reason best describes why you don't buy <commodity> more often?
Sample Wave 2 N=509, Wave 6 N=324
* Indicates significantly higher score between Waves at 95% CI

colmar brunton.

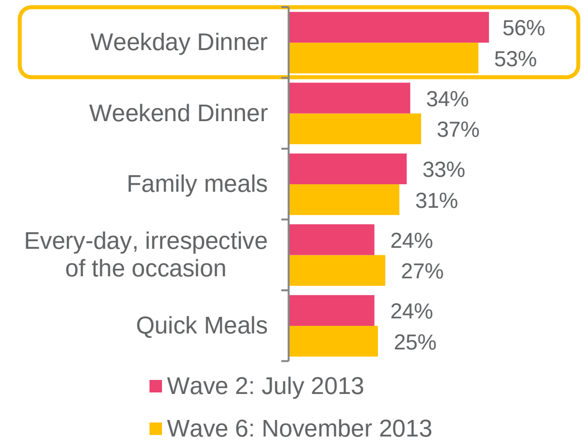
Cooking Preferences & Occasions: Sweet Corn

⇛ Australian cuisine was the most common cooking style, with an increase in traditional. There was an increase in Mexican cooking since Wave 2.
⇛ Weekday dinners were the key consumption occasion.
⇛ Accompanying vegetables and cooking styles were on trend with Wave 2.

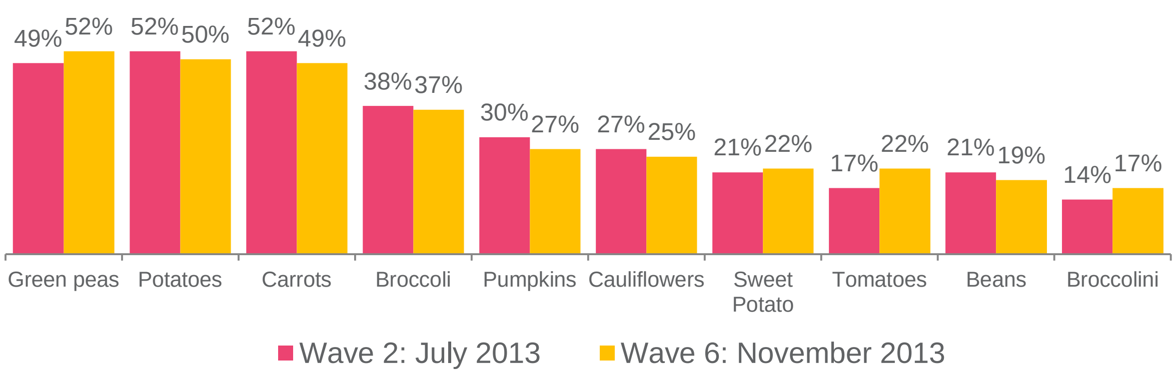
Typical Cuisine Cooked



Top 5 Consumption Occasions



Top 10 Accompanying Vegetables



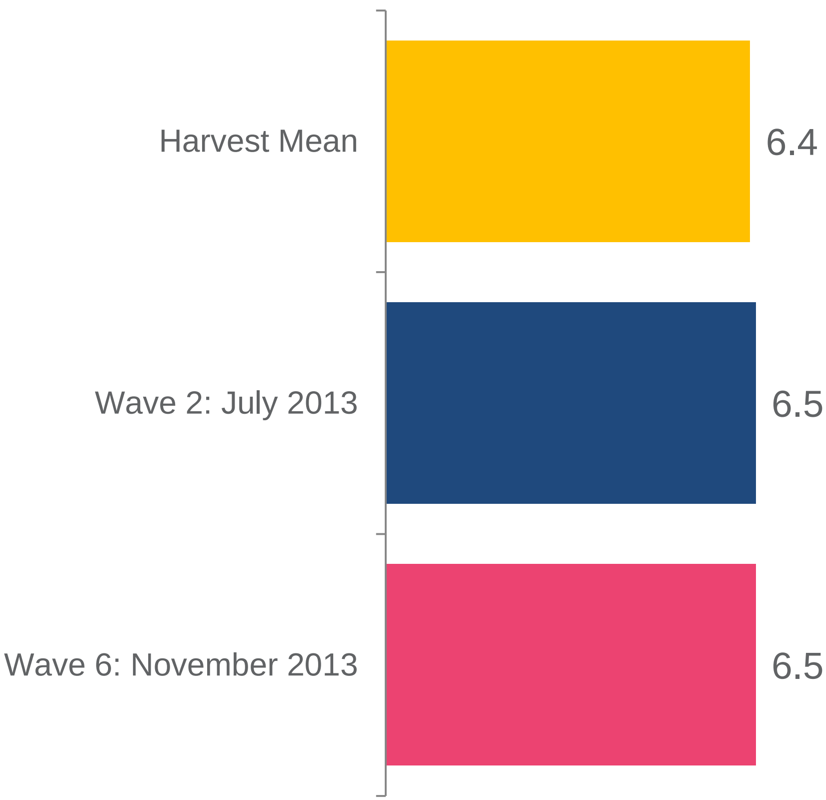
Top 10 Cooking Styles		
	Wave 2	Wave 6
Boiling	56%	54%
Steaming	41%	41%
Microwave	29%	33%
Stir frying	17%	16%
Soup	12%	13%
Grilling	8%	12%
Roasting	11%	10%
Raw	5%	7%
Blanche	4%	6%
Baking	5%	6%

Sample Wave 2 N=509, Wave 6 N=324
Q9. How do you typically cook <commodity>?
Q10. What cuisines do you cook/consume that use <commodity>?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
Q11. Which of the following occasions do you typically consume/use <commodity>?

colmar brunton.

Importance of Provenance
Sweet Corn

- Importance of provenance high, consistent over time and on par with the overall Harvest Mean.



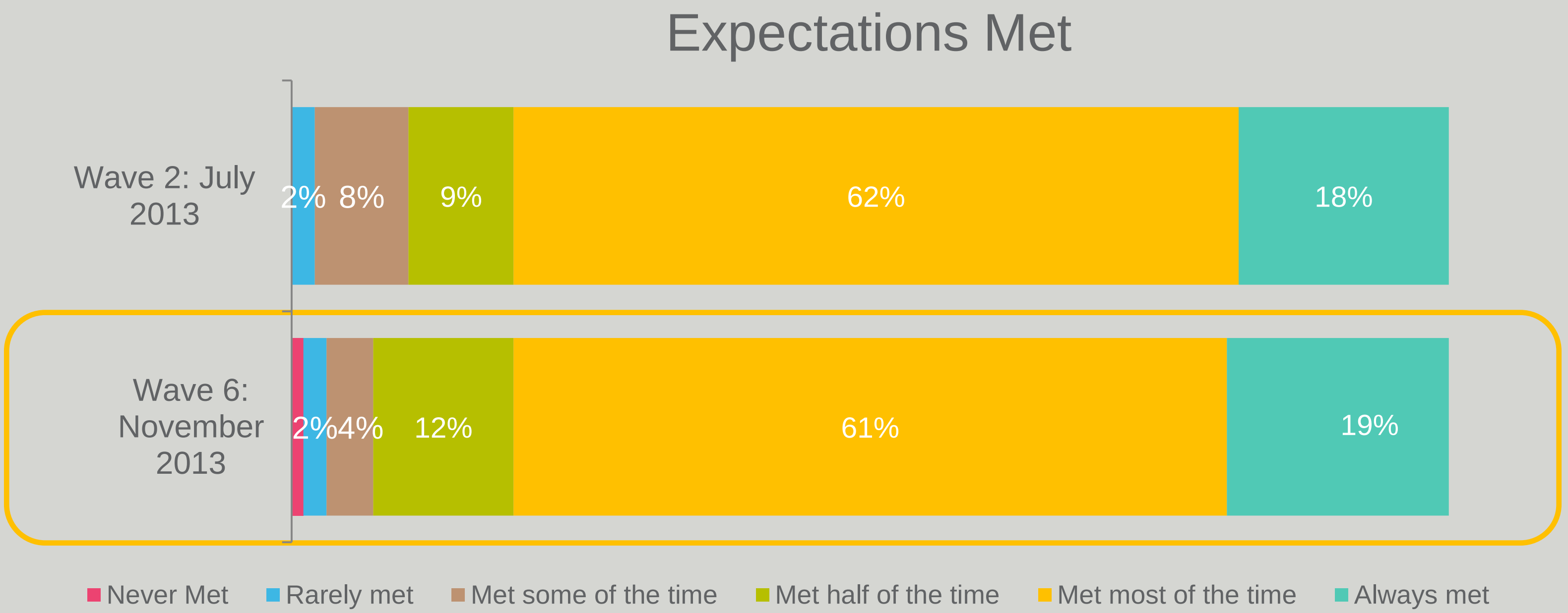
AUSTRALIAN MADE

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

Freshness and Longevity: Sweet Corn

Expected to stay fresh for **7.6** days (cf. 7.6 days Wave 2)

- Longevity of freshness was consistent with Wave 2, expected to stay fresh for a week.
- Expectations of freshness being met were comparable to Wave 2. There was greater differentiation of expectations being met some of the time/half of the time.



Sample Wave 2 N=509, Wave 6 N=324
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.

Sweet Corn

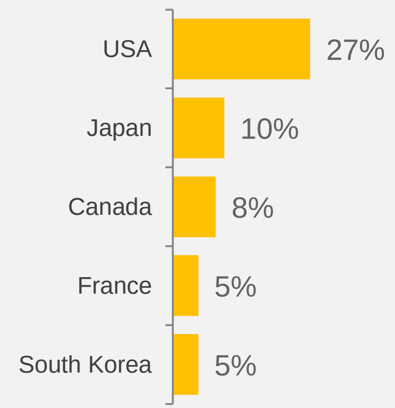
*Mintel search term was Corn

Sweet Corn Global NPDs

September-November 2013

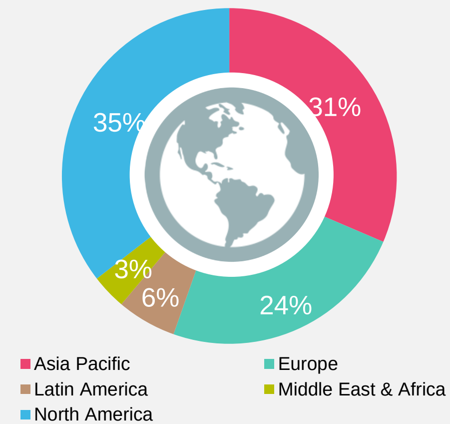
There were 296 new products launched globally over the last 3 months that contained sweet corn as an ingredient. The majority of launches occurred in North America and the Asia Pacific.
The top categories launched were meals, snacks and bakery goods.

Country

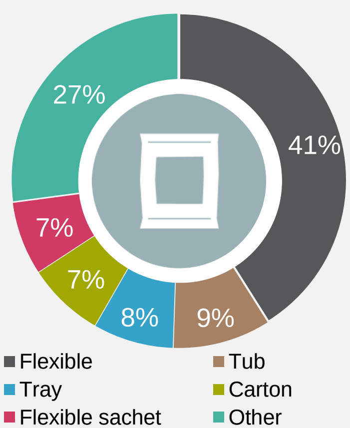


296 Global NPDs

Region



Top Pack Formats



Categories

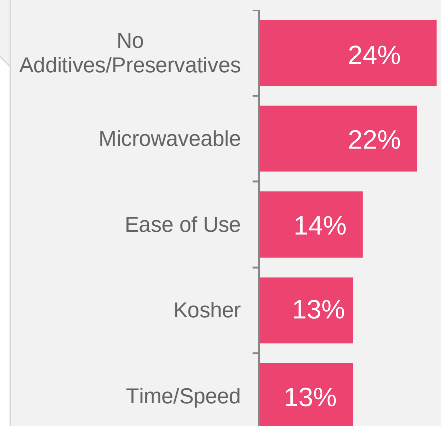
Meals 18%

Bakery 14%

Snacks 14%

Fruit & Vegetables 7%

Top Claims



Sweet Corn Product Launches:
Last 3 Months (September-November 2013)
Summary

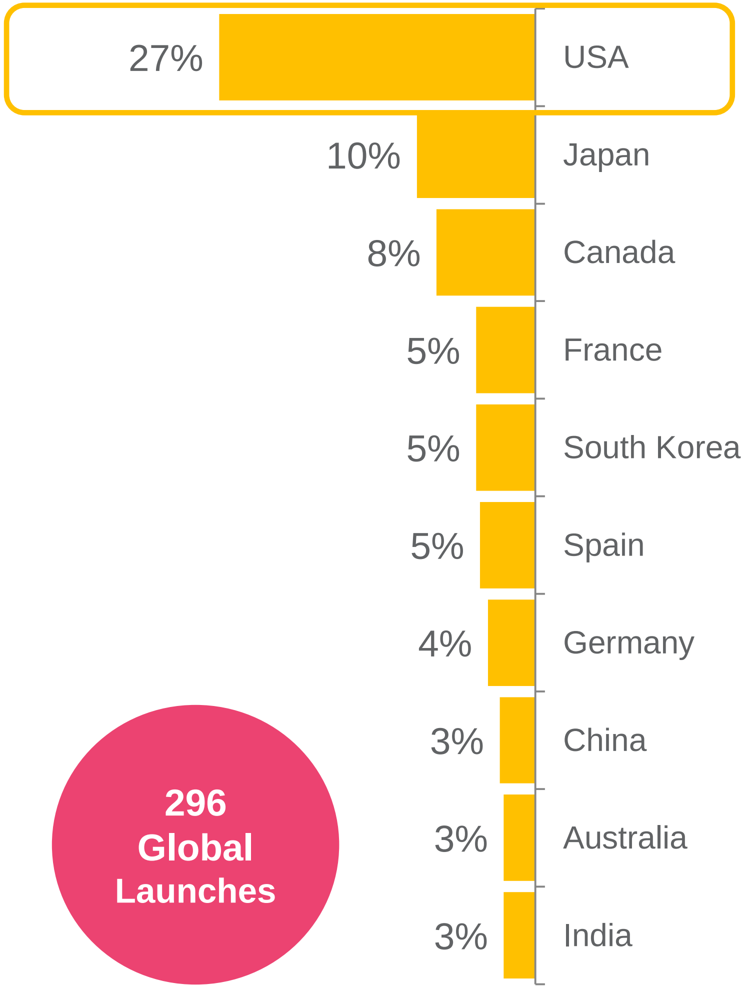
- There were 296 products launched in the last 3 months globally that contained sweet corn as an ingredient. This is higher than the 198 global launches in Wave 2. None of these products were launched in Australia.
- North America (35%) and Asia Pacific (31%) were the top regions for launches.
- Flexible packaging was the most still the common pack format used for new launches (41%).
- The top categories for launches were meals (18%), bakery goods (14%) and snacks (14%), which was consistent with launches made from April to June 2013.
- The core claims used globally were convenience claims, such as microwaveable (22%), ease of use (14%) and time/speed (13%).
- The most innovative products launched were corn and fish balls, sweet potato cake and baby cream. Examples of these can be found in the following pages.

Source: Mintel (2013)

Sweet Corn SKUs
Country, Region & Categories

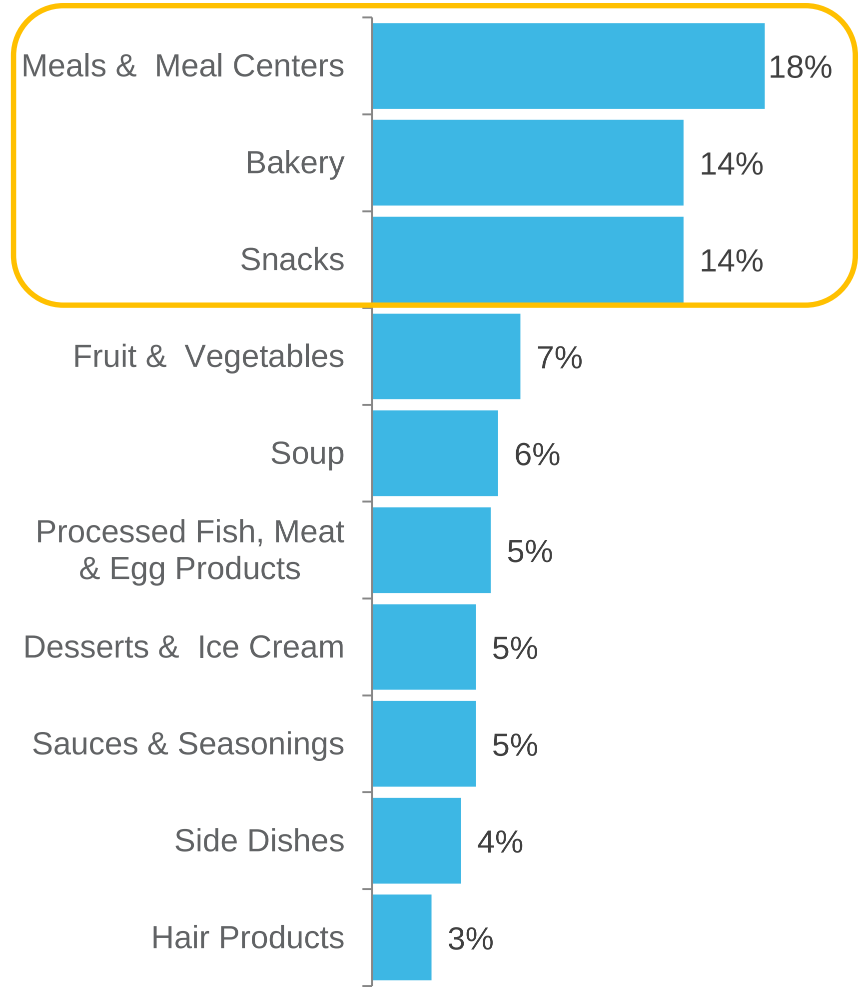
- The most active country for launches in the last 3 months was the USA.
- The main categories for launch were meals, snacks and bakery goods.

Top 10 Launch Countries



296 Global Launches

Top 10 Launch Categories

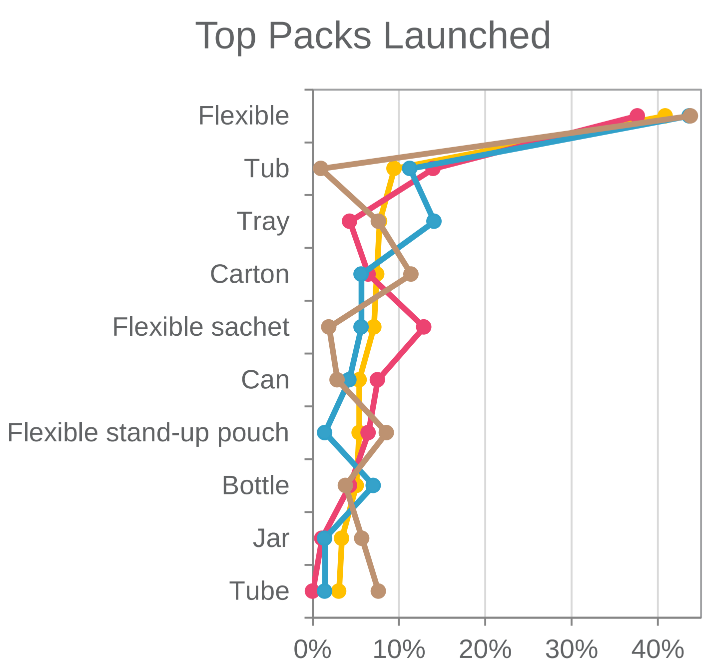


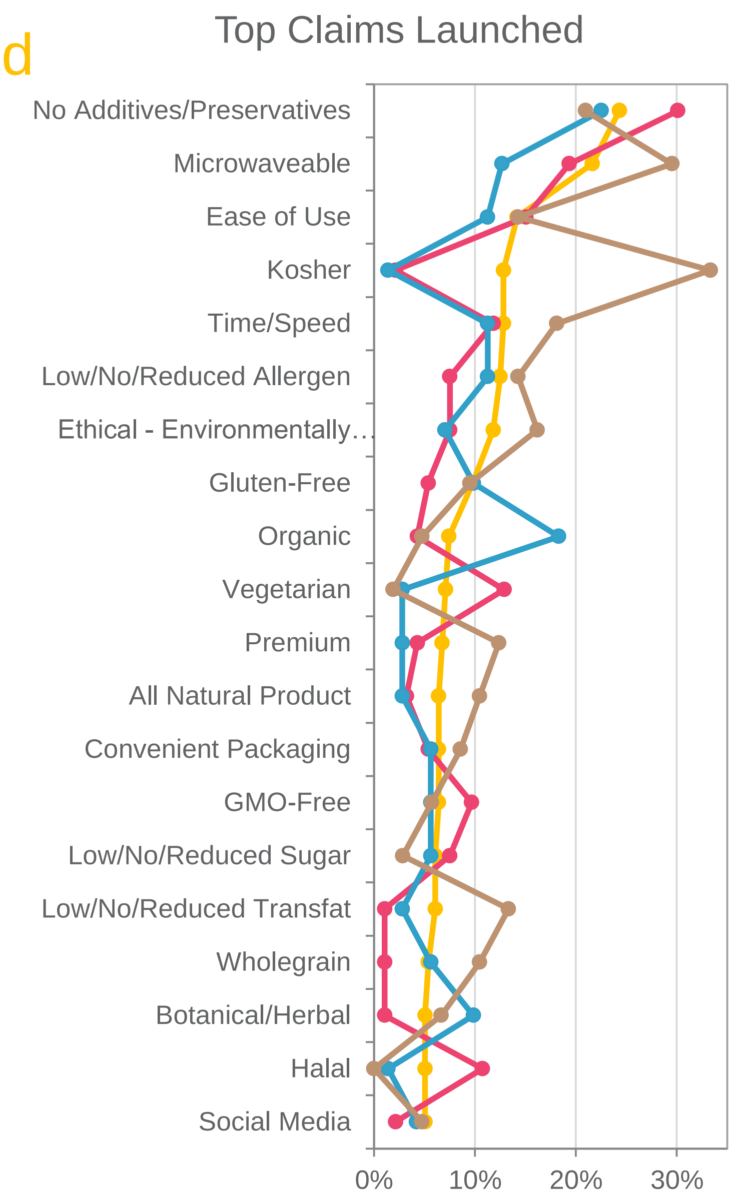
Number of Global Sweet Corn NPD for the L3M N=296

Sweet Corn Launches

Top Claims & Pack Formats Used

- The top claims used for products launched were no additives/preservatives, microwaveable and ease of use. Kosher claims were popular in North America.
- The top pack formats used for launches were flexible packaging, tubs and trays.





Global N=296 | Asia Pacific N=93 | Europe N=71 | North America N=105

Number of Global Sweet Corn NPD for the L3M N=296
Only regions with n >30 are displayed

Innovative Sweet Corn Launches:

L3M (September-November 2013)

Shany Partinee Bakery Chestnut Manjoo (South Korea)

Shany Partinee Bakery Chestnut Manjoo is now available. This home-made style product is chestnut shaped and filled with chestnut paste. It retails in a 300g pack containing ten pieces.

Claims:
N/A

Dua-Kelinci Sweet Spicy Flavoured Popcorn (Indonesia)

Dua-Kelinci Jagung Marning Rasa Pedas Manis (Sweet Spicy Flavoured Corn) features a traditional taste. The product features the halal, Facebook and Twitter logos and retails in an 80g pack displaying that the manufacturer is an official sponsor of Real Madrid Football Club.

Claims:
Halal, Social Media

Fujipan Steamed Sweet Potato Cake (Japan)

Fujipan W Osatsu No Sweet Potato Mushi Cake (Steamed Sweet Potato Cake) is steamed cake baked with sweet potato and filled with sweet potato jam to offer a texture and taste that resembles steamed sweet potato. It is available exclusively in Tohoku and Kanto regions and for a limited time only. Launched on September 1, 2013 with an RRP of 126 yen.

Claims:
Limited Edition

Prodeco GSE Baby Dream Vegetable Oil in Cream (Italy)

Prodeco GSE Baby Dream Olio Vegetale in Crema (Baby Dream Vegetable Oil in Cream) is a treatment for the prevention of diaper rash and microbiological control of the affected areas. It is formulated with a high concentration of polyglycerol from vegetable origin to act on the skin forming a film barrier to protect from irritants and to promote the restoration of optimal physiological conditions in the epidermis.

Claims:
No Additives/Preservatives, Vitamin/Mineral Fortified, Anti-Bacterial, Botanical/Herbal, Skin Disorders, Fragrance Free, For Sensitive Skin, No Animal Ingredients, Babies & Toddlers (0-4), Vegan

Source: Mintel (2013)

Innovative Sweet Corn Launches:
L3M (September-November 2013)

Gaemi Food Premium Grain Crispy Roll (South Korea)

Gaemi Food Premium Grain Crispy Roll is now available. This roasted product is made with 21 grains including brown rice, black bean, black sesame, black glutinous rice, peas, green beans, soy, barley, azuki beans, buckwheat, glutinous barley, glutinous millet, white rice, rye, glutinous rice, sorghum, kidney beans, black rice, sesame, millet and corn.

Claims:
Premium

Desert Pepper Corn Black Bean Red Pepper Salsa (USA)

Desert Pepper Corn Black Bean Red Pepper Salsa is all natural and has a medium heat having a refreshing and sensuous tangle of taste and texture. This gluten free product contains no preservatives or additives and retails in a 16-oz. pack.

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

Johnny's Bittersweet Teriyaki Sauce (Mexico)

Johnny's Salsa Teriyaki Agridulce (Bittersweet Teriyaki Sauce) is ideal as a grilled sauce or dip. It can be used with meat, pork, chicken, vegetables or fish. The product retails in a 944ml pack.

Claims:
N/A

Doi Dua Vang Sweet Corn and Fish Balls (Vietnam)

Doi Dua Vang Vien Ngo Ngot (Sweet Corn and Fish Balls) are claimed to bring new feelings to the traditional meals. The product can be fried or steamed, and is also suitable for cooked soup, noodles and hot pot dishes. It retails in a 500g pack.

Claims:
N/A

Source: Mintel (2013)

Innovative Sweet Corn Launches:
L3M (September-November 2013)

Veg Vegan Patties (South Africa)

Veg Vegan Patties have been reformulated with an improved recipe. These ready-to-eat crunchy patties are made from crushed wheat and a selection of vegetables. The microwavable product retails in a 300g pack containing four units.

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

Lotte Health One Power Energy Bar (South Korea)

Lotte Health One Power Energy Bar is now available. This product contains l-carnitine to burn fat, protein, eight vitamins, three minerals and an amino acid mix. The energy bar is said to be designed to give energy to body, and retails in a 40g pack.

Claims:
Other (Functional), Slimming

Christie Mr. Christie's Soft Baked Double Chocolate Cookies (Canada)

Christie Mr. Christie's Soft Baked Double Chocolate Cookies have been relaunched with a new brand name, previously known as Christie Mr. Christie's Snak Paks, and in a newly designed pack. They consist of bite-sized wholesome cookies made with fruit and vegetable purees for added softness.

Claims:
No Additives/Preservatives, Low/No/Reduced Allergen, Low/No/Reduced Cholesterol, Ethical - Environmentally Friendly Package, Low/No/Reduced Saturated Fat, Kosher, Portionability, Ethical - Charity, Low/No/Reduced Transfat, Children (5-12)

Fujipan Corn Bread (Japan)

Fujipan Corn Bread has been repackaged. It is made with sweet corn to give as subtle sweet flavour. The product retails in a 5-count pack. It is available exclusively in Tohoku and Kanto regions. Launched on September 1, 2013 with an RRP of 158 yen.

Claims:
Seasonal, Limited Edition

Source: Mintel (2013)

Australian Sweet Corn Launches:
L3M (September-November 2013)

Simplee Soup in a Cup Chicken & Sweetcorn Soup with Noodles

Simplee Soup in a Cup Chicken & Sweetcorn Soup with Noodles contains no added MSG, artificial colours or preservatives. To prepare just add water. The 99% fat-free product is said to be a satisfying snack anytime of the day. It retails in a 99g pack with three 33g sachets.

Simplee Soup in a Cup Chicken & Corn with Croutons Instant Soup

Simplee Soup in a Cup Chicken & Corn with Croutons Instant Soup features a new recipe. It contains no added MSG, artificial colours or preservatives. To prepare just add water. This product retails in a 90g pack containing three 30g sachets.

Asia Specialities Green Curry Microwave Soup

Asia Specialities Green Curry Microwave Soup is an authentic mild Asian curry soup with vegetables. It is an excellent source of fibre and provides 2.6 serves of vegetables per bowl. The product is suitable for vegans and vegetarians, and contains no artificial colours or flavours, preservatives or gluten. It retails in a 420g pack.

Heinz Steam Fresh Meals Honey Soy Chicken

Heinz Steam Fresh Meals Honey Soy Chicken is a meal that is high in protein and dietary fiber, low in sugar, 97% fat free and contains one serve of vegetable per pack. The meal includes snap frozen veggies, rice and tender marinated cooked chicken, all in a deliciously rich honey soy sauce and sealed in a steamer bag to retain its goodness, flavour and texture.

Street Food Meal Pots Mexican Beef with Chipotle Chilli and Beans

Street Food Meal Pots Mexican Beef with Chipotle Chilli and Beans is said to take flavour inspiration from exotic night markets, food stalls and street-side dining carts. The microwavable product is made in Australia, is described as fresh and fast, requires just heating and retails in a 310g pack.

Street Food Meal Pots Caribbean Jerk Chicken with Rice

Street Food Meal Pots Caribbean Jerk Chicken With Rice is said to take flavour inspiration from exotic night markets, food stalls and street-side dining carts. The microwavable product is made in Australia, described as fresh and fast, requires just heating and retails in a 310g pack.

Passage Foods Pasta Sauce For Kids Carrot, Pumpkin & Sweet Potato Sauce

Passage Foods Pasta Sauce For Kids Carrot, Pumpkin & Sweet Potato Sauce is described as a delicious blend that is made with all natural ingredients. The gluten free sauce is designed for children aged between three and ten, can be microwave heated and contains no added sugar.

Pitango Vegetable & Quinoa Organic Soup

Pitango Vegetable & Quinoa Organic Soup is free from gluten, 99% fat and added preservatives. This microwaveable product retails in a 600g pack providing two servings. The company is dedicated to help achieve a sustainable lifestyle, by using organic and free-range products in a way that protects the environment and the natural sources.

Source: Mintel (2013)

In the Media.

General Vegetable News (September-November 2013)

- The OECD announced Australian adults are the number one country on daily vegetable consumption. However, data from the ABS suggests that only 5.5% of Australians are eating the recommended amount of daily vegetables.
  (www.freshpalaza.com)

- Reports of false country of origin labelling of carrots in the Middle East is expected to damage the reputation of exported Australian carrots. Not having the same level of quality and freshness.
  (www.abc.net.au)

- Australia and South Korea have agreed on a free trade deal which will reduce tariffs on a range of agricultural commodities. This agreement will increase Australian exports to Korea by 73%.
  (www.abc.net.au)

Commodity News
(September-November 2013)

- Planting of pea crops had been delayed due to significant rainfall in Tasmania since August. Food processors are unsure whether their targets will be met for the season.

(www.abc.net.au)

- Health benefits of green peas are Niacin, which reduces bad cholesterol. Vitamin K helps absorb calcium for healthy bones.

(www.health.india.com)

- Corn oil has been found to lower cholesterol more favourably than extra virgin olive oil.

(www.ingredientsnetwork.com)

- The US Department of Agriculture has indicated a 50 million bushel increase in corn use for ethanol next year.

(www.domesticfuel.com)

- Over a third of bagged salad is thrown away by consumers.

(The Independent)

- Boom in US market demand for European lettuce varieties.

(FreshPlaza.com)

- A compound in broccoli could reduce the chance of a person developing skin cancer

(Daily Mail).

- A compound in broccoli has protective features against harmful radiation

(TheHoya.com).

Thanks.