Monthly Tracker Report Wave 5: October 2013

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Background & Methodology.

Background
& Setting the Scene.

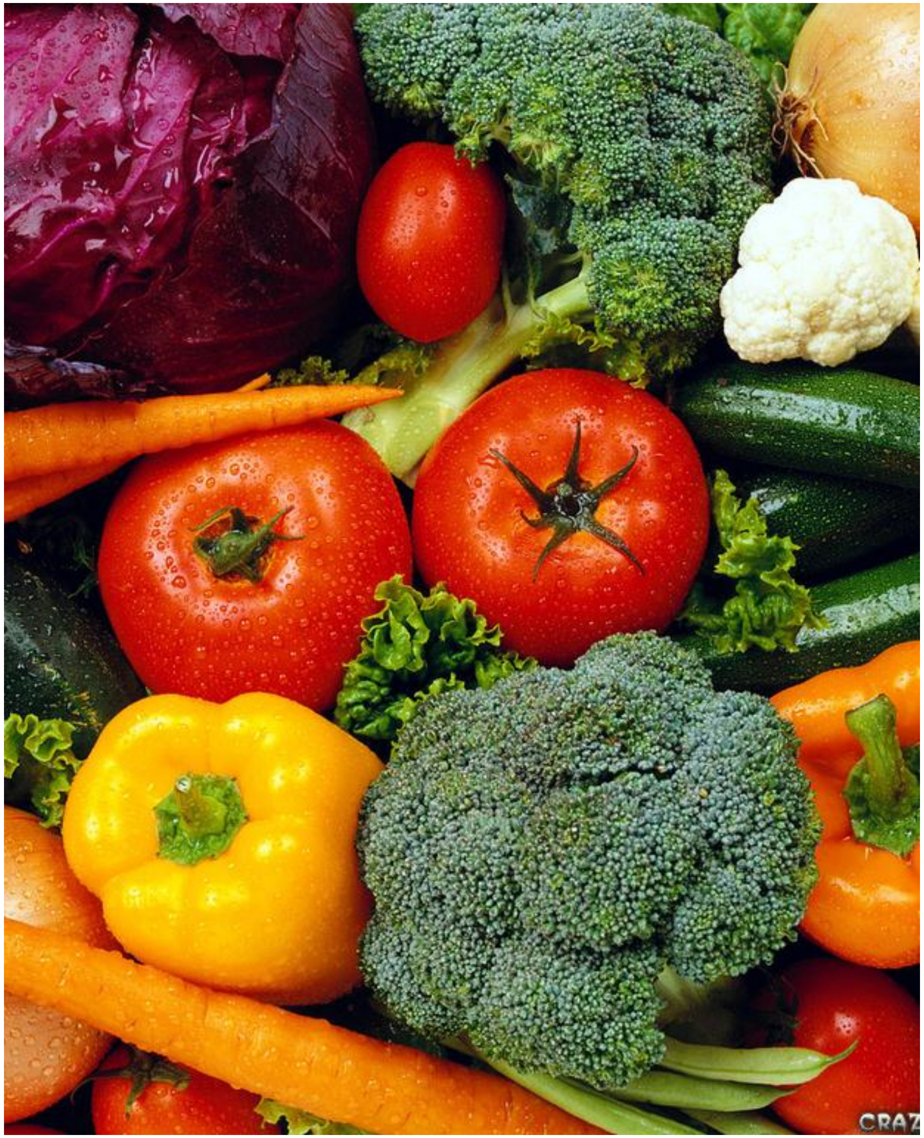
There is an increasing need in Australia's Horticulture Industry to monitor and gauge consumer perception and behaviour in relation to fresh vegetables.

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 5, October 2013) focuses on:

- Beans
- Carrots
- Cauliflowers
- Pumpkins



Online Methodology.

- Respondents were recruited via an Online Panel. If the respondents met the recruitment requirements of sufficient vegetable consumption (monthly) they were asked to complete the online questionnaire.
- All respondents completed general demographic and consumption questions. If respondents purchased any of the specific commodities within the last month they would complete those questions. A minimum of N=500 respondents completed the questionnaire.
- 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.

General Respondent Questions

- **Demographics**
- **Vegetable Consumption**

Commodity 1 | **Commodity 2** | **Commodity 3** | **Commodity 4**

Commodity Specific Questions

- **Category Health**
- **Purchase & Consumption Habits**
- **Price Perceptions & Average Spend**
- **Triggers/Barriers to Purchase**
- **Preparation Preferences**

+ 2 Ad hoc Questions per Month

Sample.

In total, 589 respondents completed the questionnaire. Respondents represented all States and Territories, as well as both metro and rural areas.

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

To qualify for the questionnaire, respondents...

⇛Were aged 18 years and over

⇛Purchased fresh vegetables at least once a month

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

⇛Were the main or joint grocery buyer

	Total N=589	Bean n=346	Carrot n=520	Cauliflower n=448	Pumpkin n=391
Gender					
Male	48%	51%	49%	46%	45%
Female	52%	49%	51%	54%	55%
Age					
18-24 y.o.	4%	3%	3%	3%	4%
25-34 y.o.	17%	15%	16%	18%	15%
35-44 y.o.	16%	18%	16%	18%	17%
45-54 y.o.	17%	17%	17%	16%	16%
55-64 y.o.	21%	21%	21%	21%	22%
65+ y.o.	25%	25%	26%	25%	25%
Household					
Single Income no Kids	22%	21%	21%	21%	22%
Double Income no kids	19%	17%	18%	19%	17%
Young Families	17%	18%	16%	17%	17%
Established Families	18%	19%	18%	18%	18%
Empty Nesters	26%	24%	27%	24%	27%
Location					
New South Wales	32%	32%	34%	29%	31%
Victoria	18%	17%	20%	17%	19%
South Australia	9%	9%	8%	10%	9%
Queensland	25%	26%	28%	27%	25%
Western Australia	12%	12%	9%	13%	12%
Tasmania	3%	2%	2%	4%	3%
Australian Capital Territory	1%	1%	1%	1%	1%

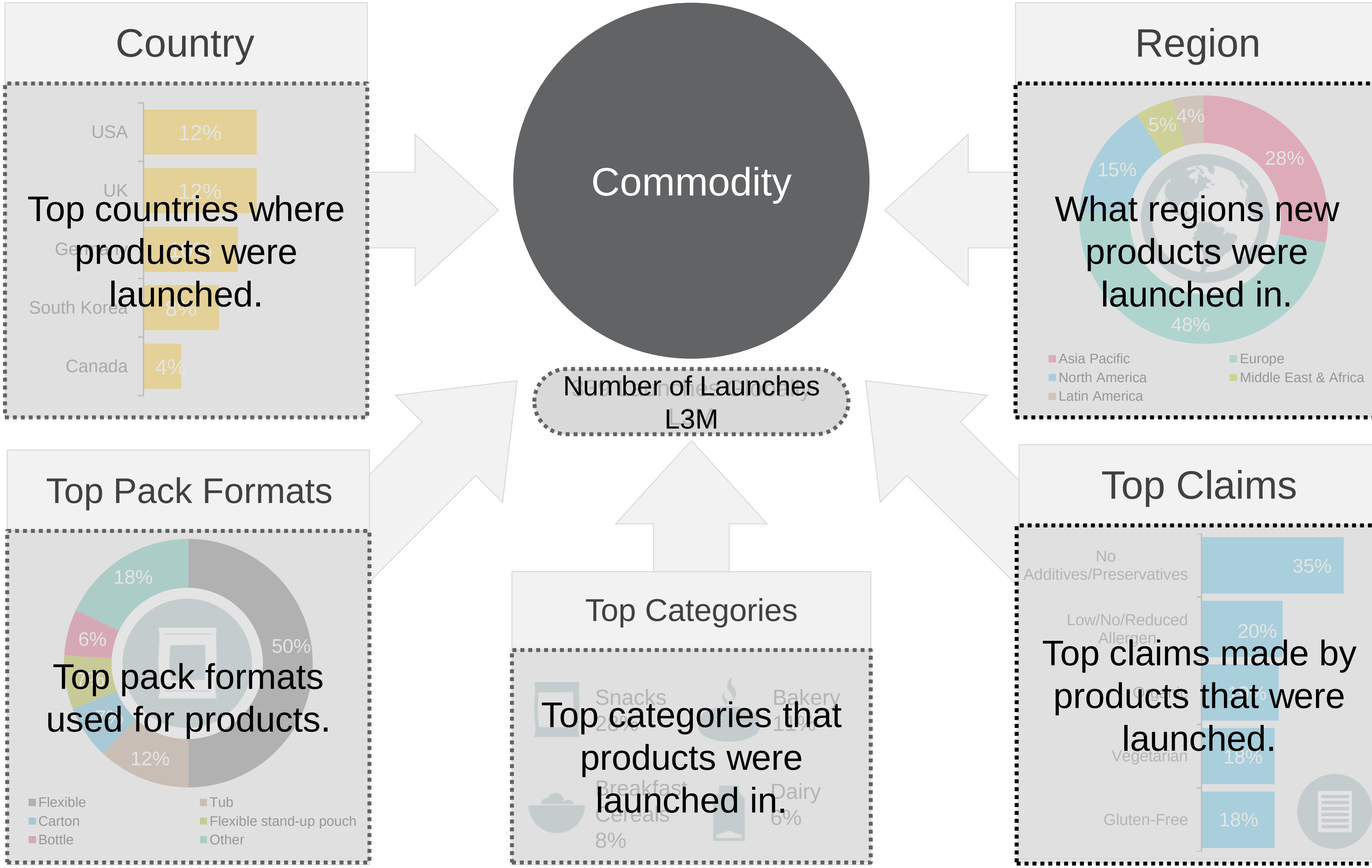
Trends Research: Our Approach

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

Product Launches Last 3 Months (L3M)

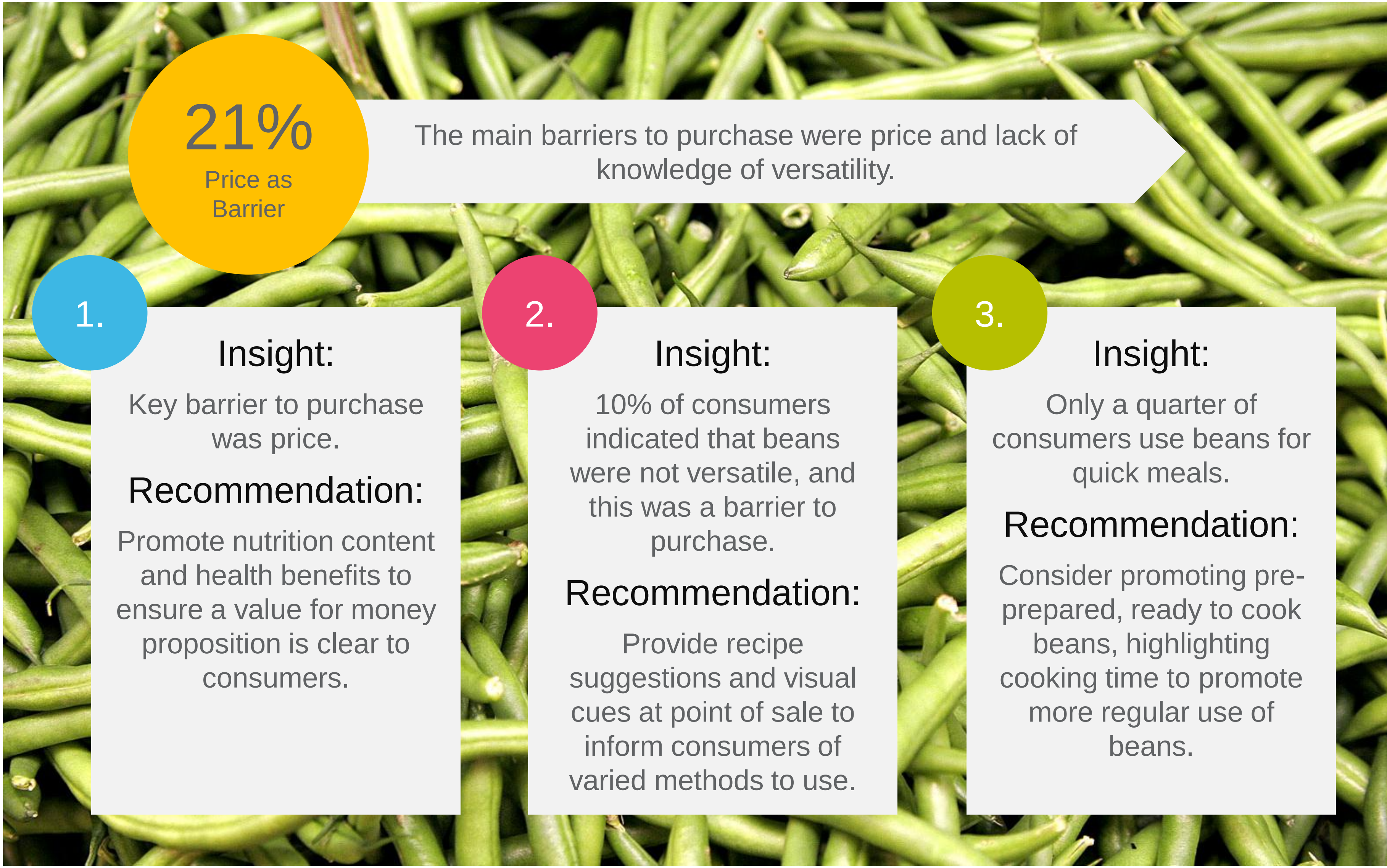
How to Read Summaries

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



Wave 5:
Executive Summary

Beans Grower Action Plan



21%

Price as Barrier

The main barriers to purchase were price and lack of knowledge of versatility.

1.

Insight:

Key barrier to purchase was price.

Recommendation:

Promote nutrition content and health benefits to ensure a value for money proposition is clear to consumers.

2.

Insight:

10% of consumers indicated that beans were not versatile, and this was a barrier to purchase.

Recommendation:

Provide recipe suggestions and visual cues at point of sale to inform consumers of varied methods to use.

3.

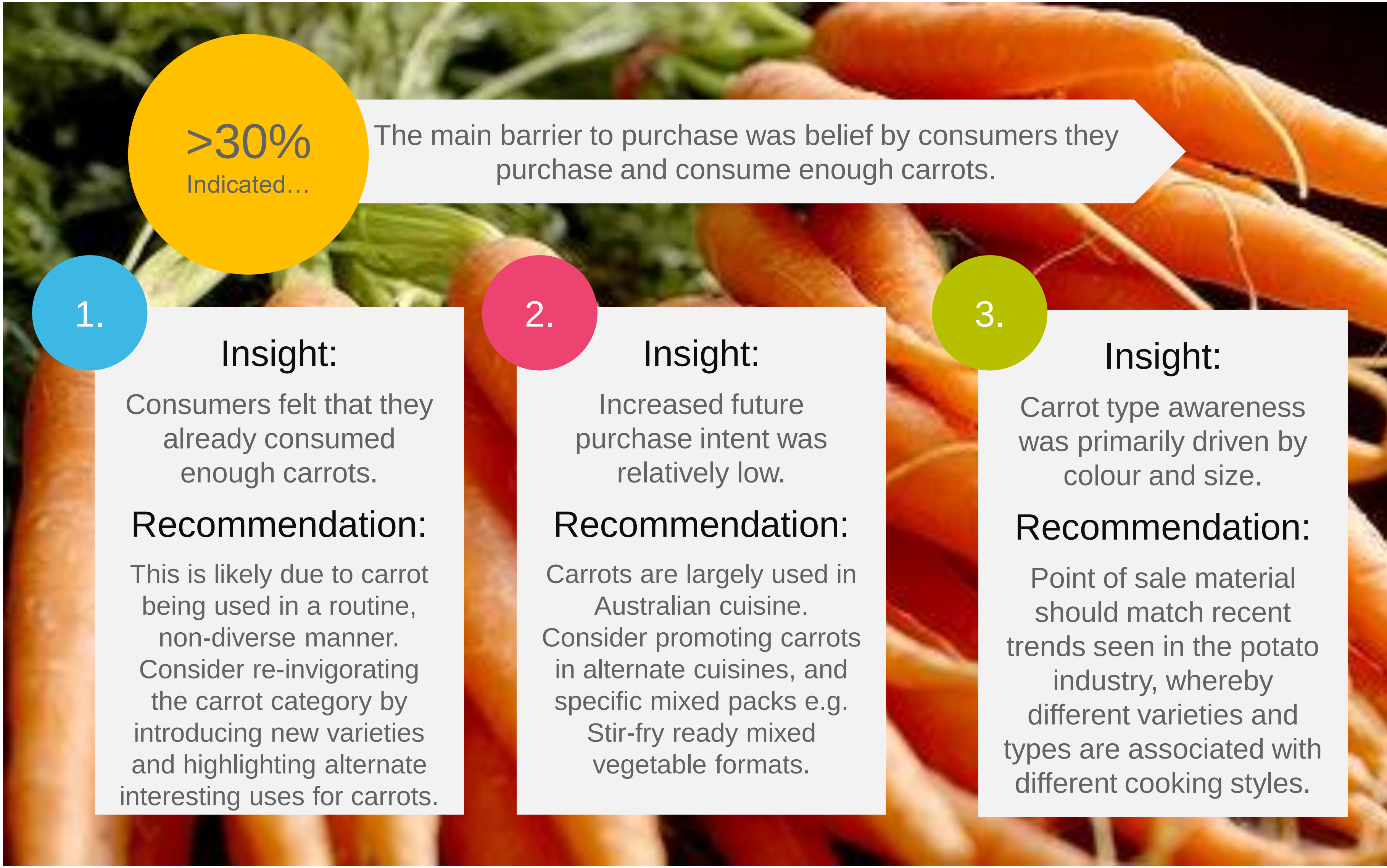
Insight:

Only a quarter of consumers use beans for quick meals.

Recommendation:

Consider promoting pre-prepared, ready to cook beans, highlighting cooking time to promote more regular use of beans.

Carrot Grower Action Plan



>30%
Indicated…

The main barrier to purchase was belief by consumers they purchase and consume enough carrots.

1.

Insight:

Consumers felt that they already consumed enough carrots.

Recommendation:

This is likely due to carrot being used in a routine, non-diverse manner. Consider re-invigorating the carrot category by introducing new varieties and highlighting alternate interesting uses for carrots.

2.

Insight:

Increased future purchase intent was relatively low.

Recommendation:

Carrots are largely used in Australian cuisine. Consider promoting carrots in alternate cuisines, and specific mixed packs e.g. Stir-fry ready mixed vegetable formats.

3.

Insight:

Carrot type awareness was primarily driven by colour and size.

Recommendation:

Point of sale material should match recent trends seen in the potato industry, whereby different varieties and types are associated with different cooking styles.

Cauliflower Grower Action Plan

70% Of consumers could not recall a variety/type of cauliflower.

1.

Insight:

Compared to Wave 1, significantly more consumers were purchasing cauliflower at specialist retailers.

Recommendation:

Growers should consider working more closely with specialist retailers to educate them on different varieties, who in turn can educate the consumers.

2.

Insight:

There is a desire amongst consumers for the ability to purchase smaller portion sizes.

Recommendation:

Consider selling cauliflower in smaller floret format, as well as whole or half portions.

3.

Insight:

Global trends are showing an increase in the use of cauliflower in processed foods.

Recommendation:

Consider promoting cauliflower to processed food manufacturers more heavily. Suggest variety/type of cauliflower is called out clearly on pack.

Pumpkin Grower Action Plan

58% Of consumers use pumpkin to add variety to their vegetable selection.

1.

Insight:

Pumpkin had one of the highest levels of reported wastage.

Recommendation:

Educate consumers on the versatility of using more of their pumpkin (i.e. Seeds) to decrease wastage and further increase variety to meals.

2.

Insight:

Being inconvenient to peel and prepare was a key barrier to purchase.

Recommendation:

Further promote pre-prepared, ready to cook pumpkin and investigate potential frozen offerings, highlighting the convenience this may offer.

3.

Insight:

Shelf life of vegetables is of high importance to consumers. Of all vegetables, pumpkin has the longest expected shelf life.

Recommendation:

Promote the long shelf life of fresh pumpkin to highlight value and convenience.

Wave 5: Fact Base

(1 of 2)

Pumpkin:

- Key comparisons with Wave 1 were an increase in the average price per kg and significant increase in Queensland Blue awareness. Consumers were more likely to state triggers to future purchase as being buying what they need and wanting variety in their diets.
- Pumpkins had high levels of importance, satisfaction, endorsement and interest in new types; pumpkins scored higher than the Harvest mean on all category health measures.
- Pumpkins were purchased on average 3.1 times a month and consumed 9.1 times.
- Pumpkins were perceived to be fairly good value for money. Consumers typically purchased 1.5kg in one shop, in the format of half pumpkins. The last recalled spend was $3.30.
- Price tracking showed that prices varied little by state or retailer, and the average price was $3.72/kg.
- Butternut and Jap pumpkins were the varieties with the highest spontaneous awareness. Only one in five respondents could not name any varieties of pumpkin.
- Pumpkins were expected to stay fresh for 13 days, and 80% of respondents found that this expectation was met most or all of the time.

Carrot:

- Compared with Wave 1, consumers were significantly more likely to purchase from a specialist retailer. The recalled last spend was reduced by $1.00. Consumers were significantly more likely to cook carrots in traditional Australian cuisine. Provenance was significantly more important to consumers.
- Carrots did not score highly on importance and were on par with Harvest mean for most category health measures; however, the vast majority expect to buy the same amount in future.
- Carrots were purchased on average 3.9 times a month and consumed 14.5 times a month.
- Carrots were perceived to be very good value for money. Typical purchase amount was 1.2kg of carrots, in a small bag. The last recalled spend was $2.40.
- Price tracking showed little variation in carrot price. The average price was $1.96/kg.
- Six in ten respondents did not know any varieties of carrot. Respondents described carrots by their colour or size.
- Respondents expected carrots to stay fresh for 12 days, and the majority (88%) found that this expectation was met most or all of the time.

Wave 5: Fact Base
(2 of 2)

Cauliflower:

- Compared with Wave 1, consumption of cauliflower had significantly increased and was more likely used to compliment other food. There was a significant increase in purchased from specialist retailers. There was higher awareness for all cauliflower types, especially for white. Cauliflower was cooked significantly more in Chinese cuisine.
- Cauliflowers did not have high levels of importance or interest – they are below the Harvest category health means. However, 10% of respondents intend to buy more in future.
- Cauliflowers were purchased on average 3.2 times a month and consumed 8.5 times.
- Respondents thought that cauliflowers were good value for money. Consumers typically purchased 1kg at a time, in the format of whole cauliflower. The last recalled spend was $2.90.
- Price tracking showed that cauliflowers were on special in Coles in NT, SA and QLD, which led to a large price range in this wave. The average price was $3.18 each.
- 70% of respondents did not know any varieties of cauliflower – those who named varieties did so by colour.
- Cauliflowers were expected to stay fresh for 9 days, and 81% of respondents found that this was met most or all of the time.

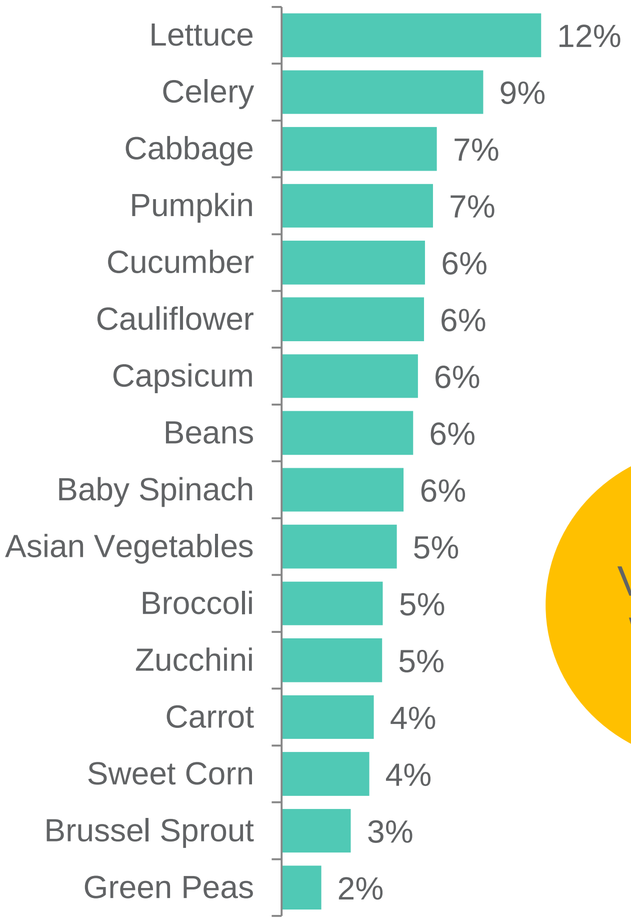
French & Runner Beans:

- Key comparisons with Wave 1 indicate that there was a decrease in average weight of purchase and significant increase in the number of consumers indicating that beans are not versatile. There was a significant increase in awareness of broad beans and increase in using beans in Australian and British cuisine.
- Beans scored lower than the Harvest category health mean on satisfaction and endorsement. However, 12% of respondents intend to buy more in future.
- Beans were purchased on average 3.6 times a month and consumed 8.3 times a month.
- Beans were typically purchased individually and the last purchase amount was 600g. Last recalled spend was $3.30 and value for money was rated quite well.
- Price tracking showed a large range in price across states and by store. The average price was $6.94/kg.
- Just over half of respondents did not know any varieties of bean. Fewer respondents were able to name varieties than in Wave 1.
- Respondents expected beans to stay fresh for 8 days, and the majority (70%) found that this expectation was met most or all of the time.

Wave 5:
Ad-Hoc Questions

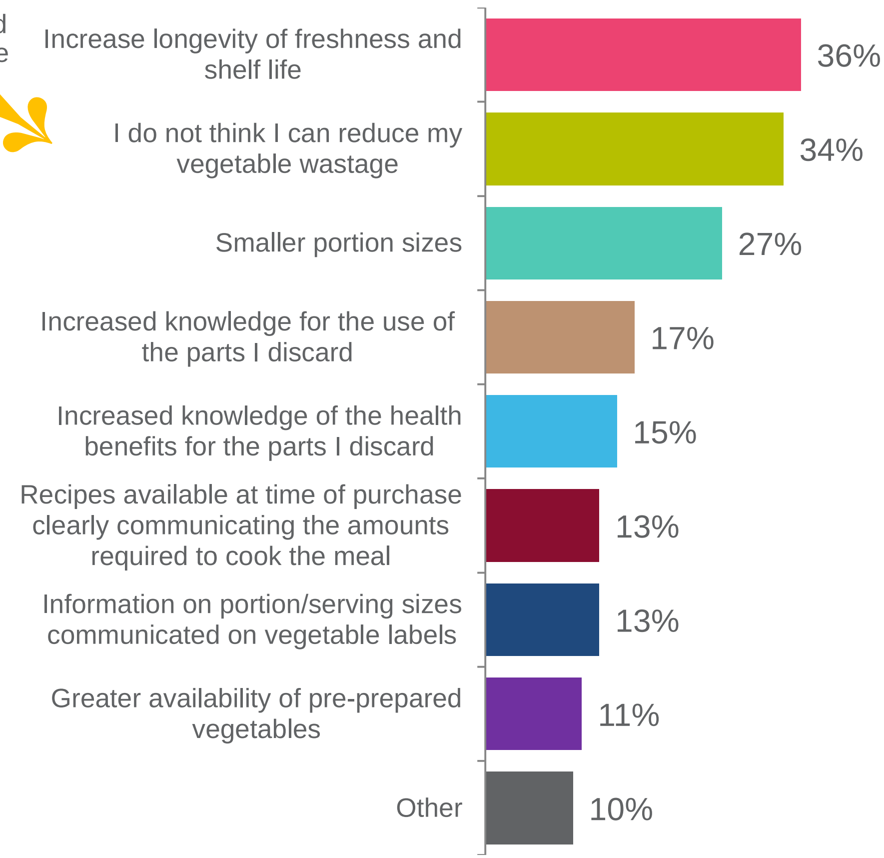
Additional Monthly Questions Asked:
Vegetable Wastage

- Overall, vegetable wastage was relatively minimal.
- Over a third of respondents identified that increased freshness and shelf-life would decrease their vegetable wastage.
- Respondents also wanted smaller portion sizes available to purchase and greater information on using the whole vegetable.



Average Vegetable Wastage 6%

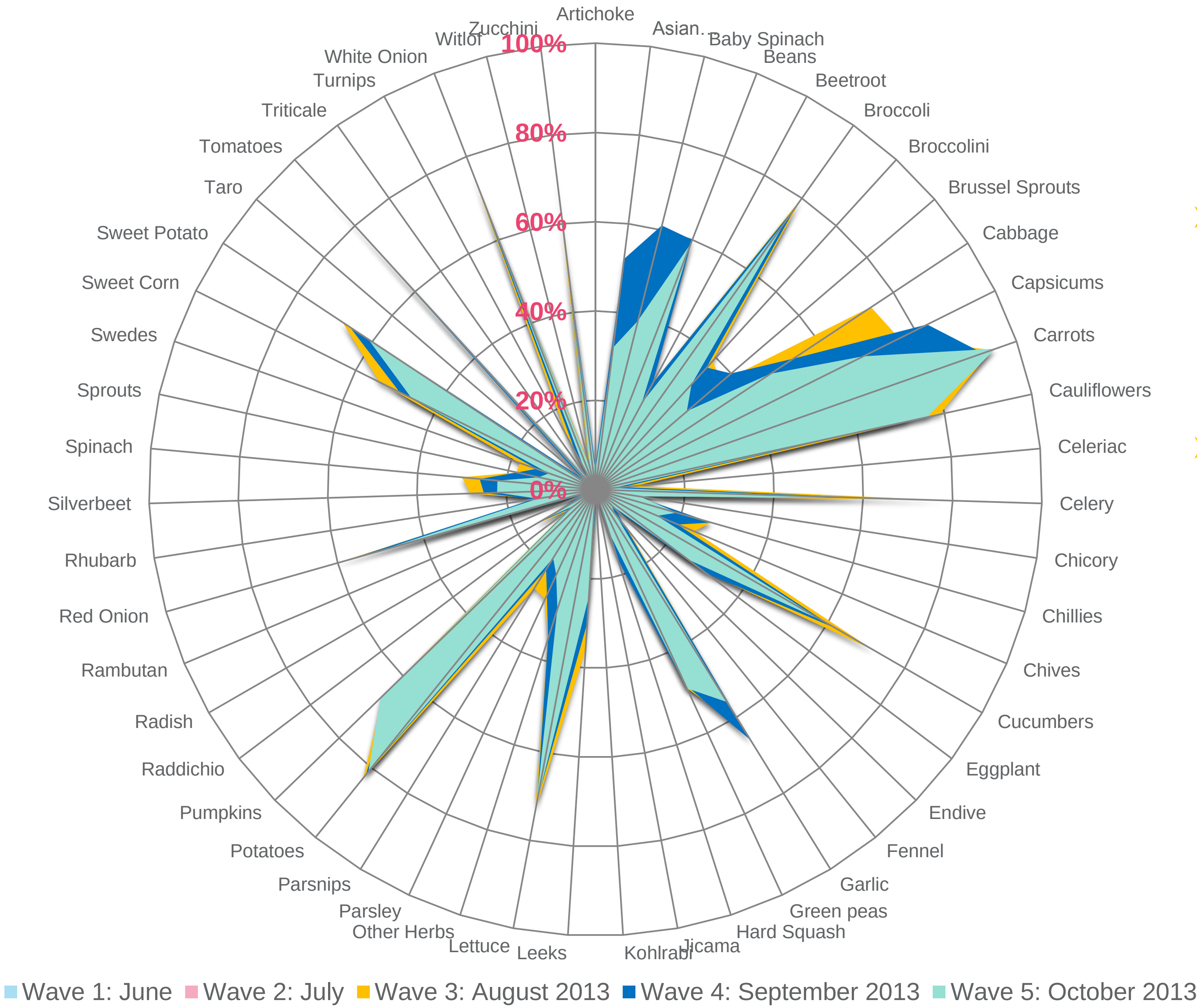
Over a third of respondents believed they could not reduce their wastage.



AH1. Of the vegetables below, what percentage of the amount that you purchase, do you typically not use?
AH2. How could this wastage be reduced?
N=589

Wave 5: Overall Vegetable Tracking

Vegetables Purchased Last Month



- Overall, there were less vegetables purchased compared with Wave 4. This was particularly noticeable for sweet potato, garlic, chillies and chives.
- Carrots, tomatoes, potatoes and cauliflowers were the most purchased vegetable commodities this month.

Wave 1 N=1010, Wave 2 N=1643, Wave 3 N=868, Wave 4 N=939 ,Wave 5 N=707
S8. Which of the following fresh vegetables have you purchased in the last month?

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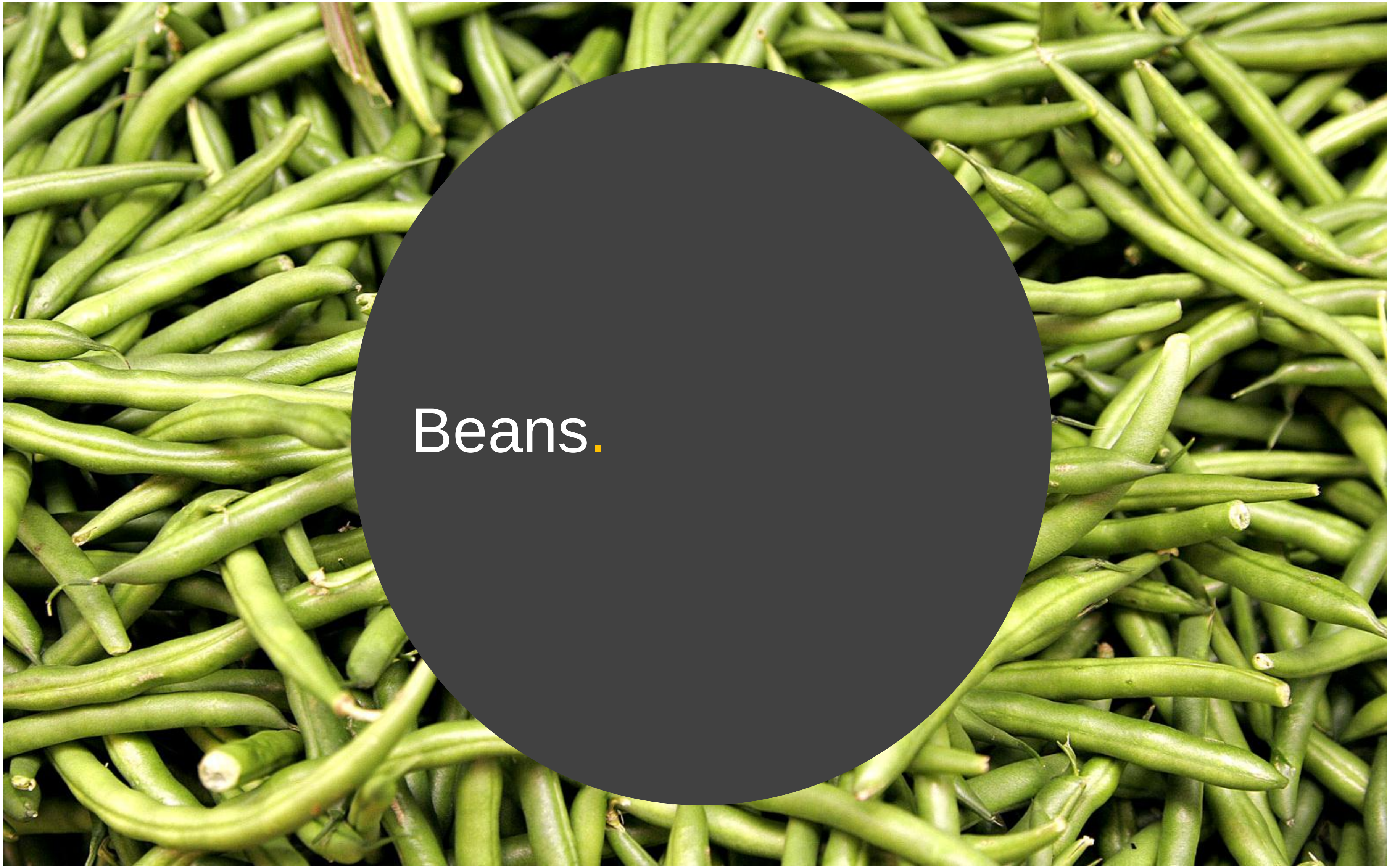
Category Health

- Category health is a measure to provide an overview of consumer sentiment of the commodities tracked each month.
- Similarly to Wave 1, Carrot and Cauliflower have low importance and interest in new varieties compared with other commodities tracked (Harvest Total Mean). This suggests that these vegetables may have become uninspiring staple foods. They will require something new to reinvigorate the category and grow consumer interest (to increase purchase)
- Pumpkin displayed strong category health scores, indicating that consumers are satisfied with availability and freshness of produce. A high level of importance is placed on pumpkin, indicating consumer demand for the vegetable. Future purchase intent was low, which is likely due to seasonality of the vegetable.

	Beans	Carrot	Cauliflower	Pumpkin	Harvest Total Mean
Importance	6.2	5.7	5.0	6.7	6.2
Satisfaction	6.2	6.7	6.5	6.9	6.6
Endorsement	6.4	6.6	6.4	6.9	6.8
Interest (New Varieties)	6.1	5.8	5.5	6.3	6.1
Future Purchase					
More	12%	9%	10%	11%	13%
Same	86%	91%	89%	87%	86%
Less	2%	1%	1%	2%	2%

CH1. How important to you is having a range of <commodity> available in the store where you usually shop?
CH2. How satisfied or dissatisfied are you with the range of <commodity> currently available?
CH3. How likely would you be to recommend <commodity> to your family and friends?
CH4. How interested or disinterested are you in new <commodity> varieties?
CH5. In the future, are you likely to buy?
Harvest Total Mean is the meal of all commodities from Wave 1, up to and including current wave. N=589

Beans.



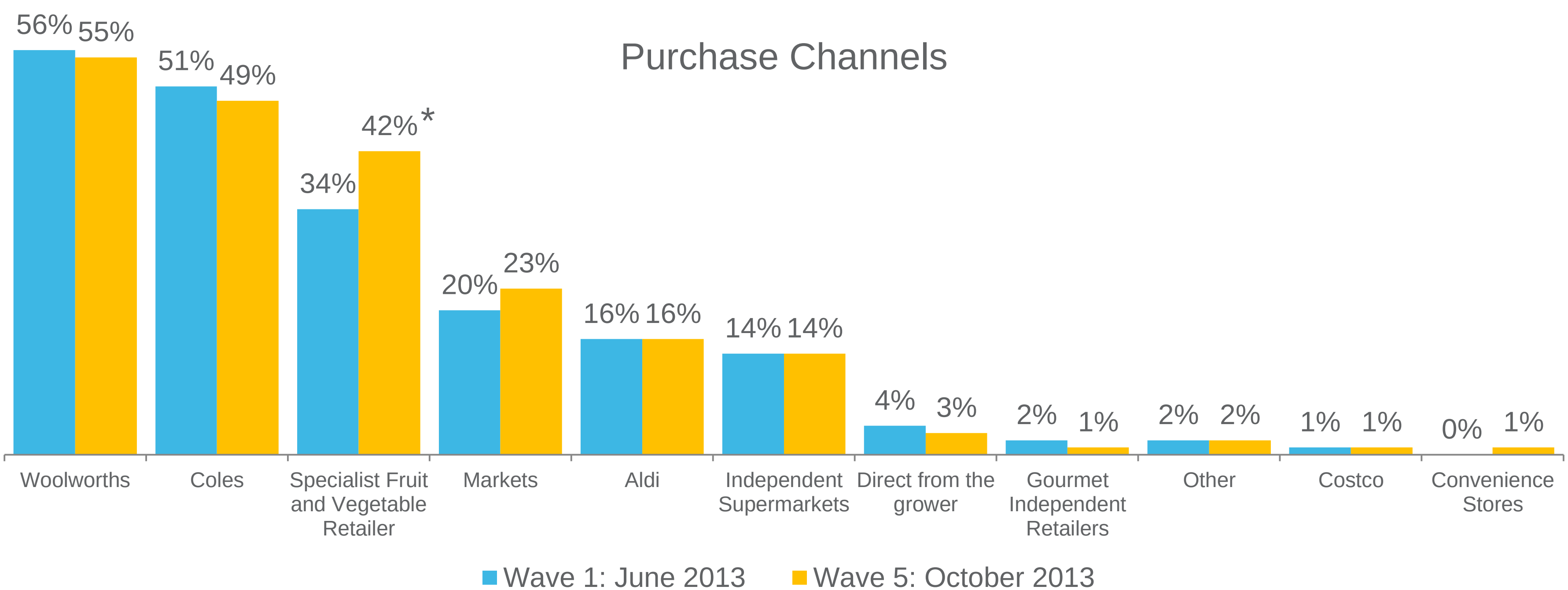
Purchase and Consumption Behaviour

French & Runner Beans

Average Purchase **3.6** times per month

Average Consumption **8.3** times per month

- Compared with Wave 1, purchase of beans from specialist retails has significantly increased (up 8%).
- The most popular retail channels for purchase remain Woolworths and Coles.
- On average, French and runner beans were purchased almost once a week, and consumed twice a week.



Q1. On average, how often do you purchase French and runner beans?
Q2. On average, how often do you consume French and runner beans?
Q5. From which of the following channels do you typically purchase French and runner beans?
Sample Wave 1 N=506, Wave 5 N=346
* Indicates significantly higher scores between Waves

Average Spend & Price Sensitivity

French & Runner Beans

⇛ The average consumer typically purchases **600g** of Beans, which is 300g less compared with Wave 1.

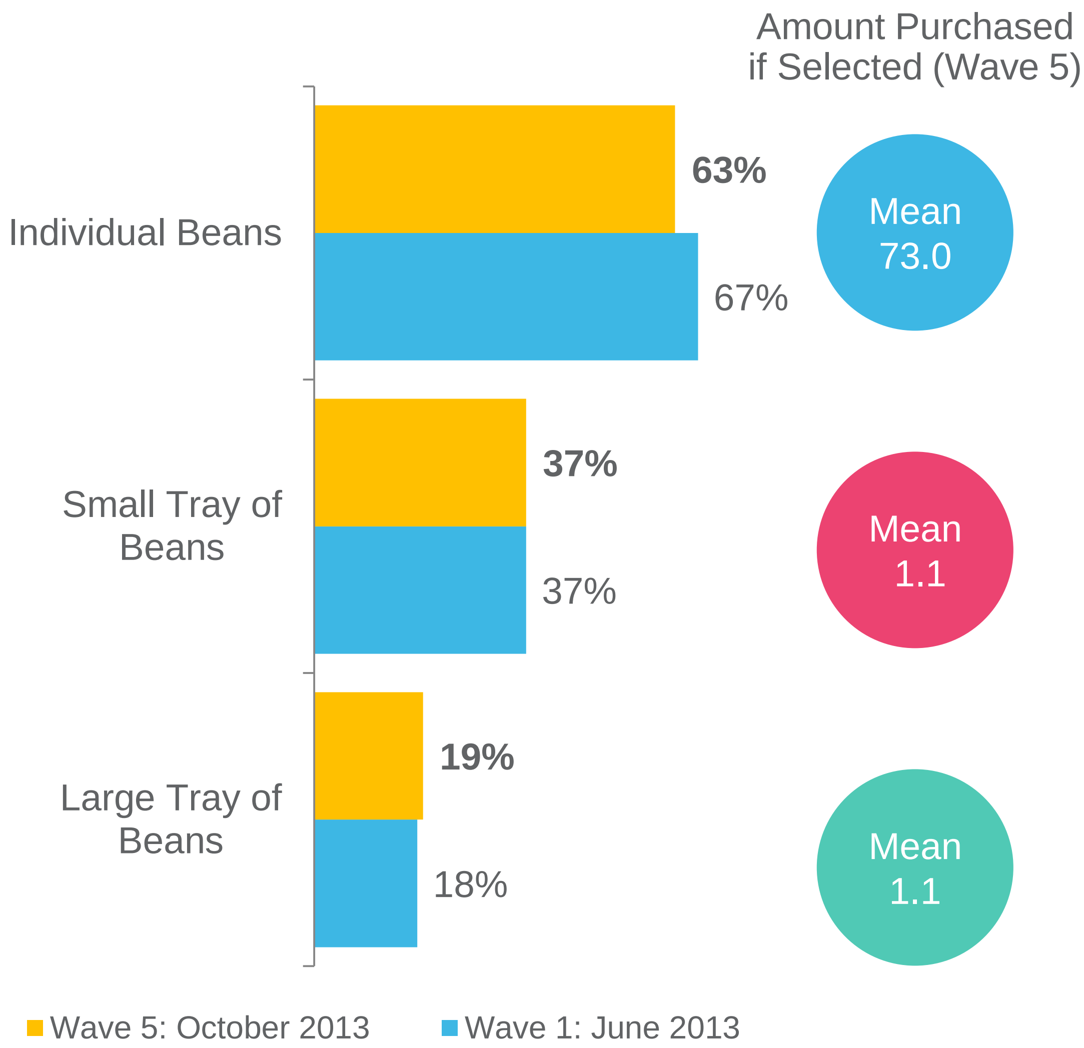
⇛ The average recalled last spend on Beans was **$3.30**

⇛ Consumers perceived the average price for Beans as good value for money **(6.2/10).**

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

Pack Formats Purchased

French & Runner Beans

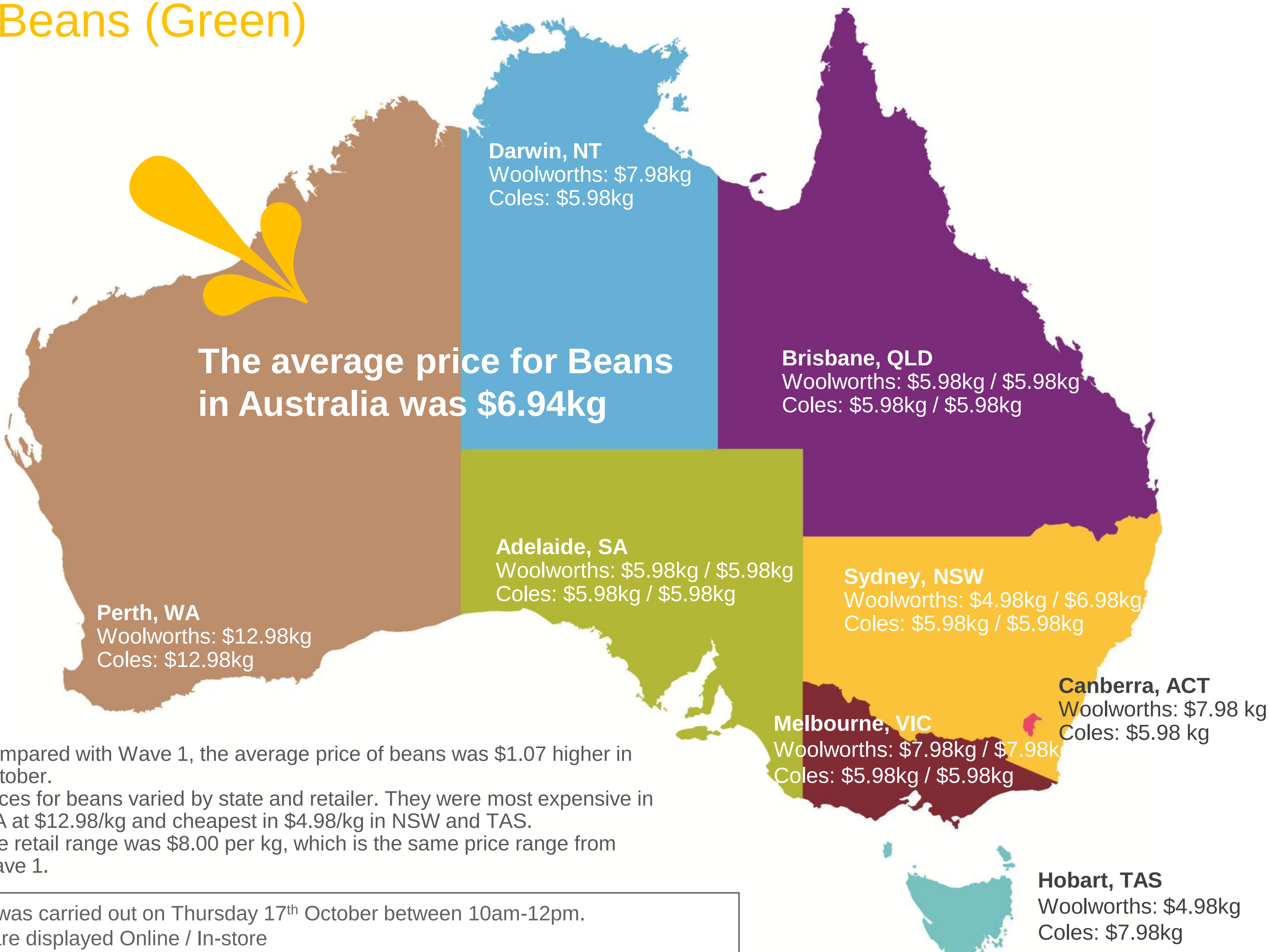


- The proportion of respondents who purchase beans in each format has remained in line with Wave 1.
- On average the number of individual beans purchased slightly increased.

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

Online and In-store Commodity Prices

Beans (Green)



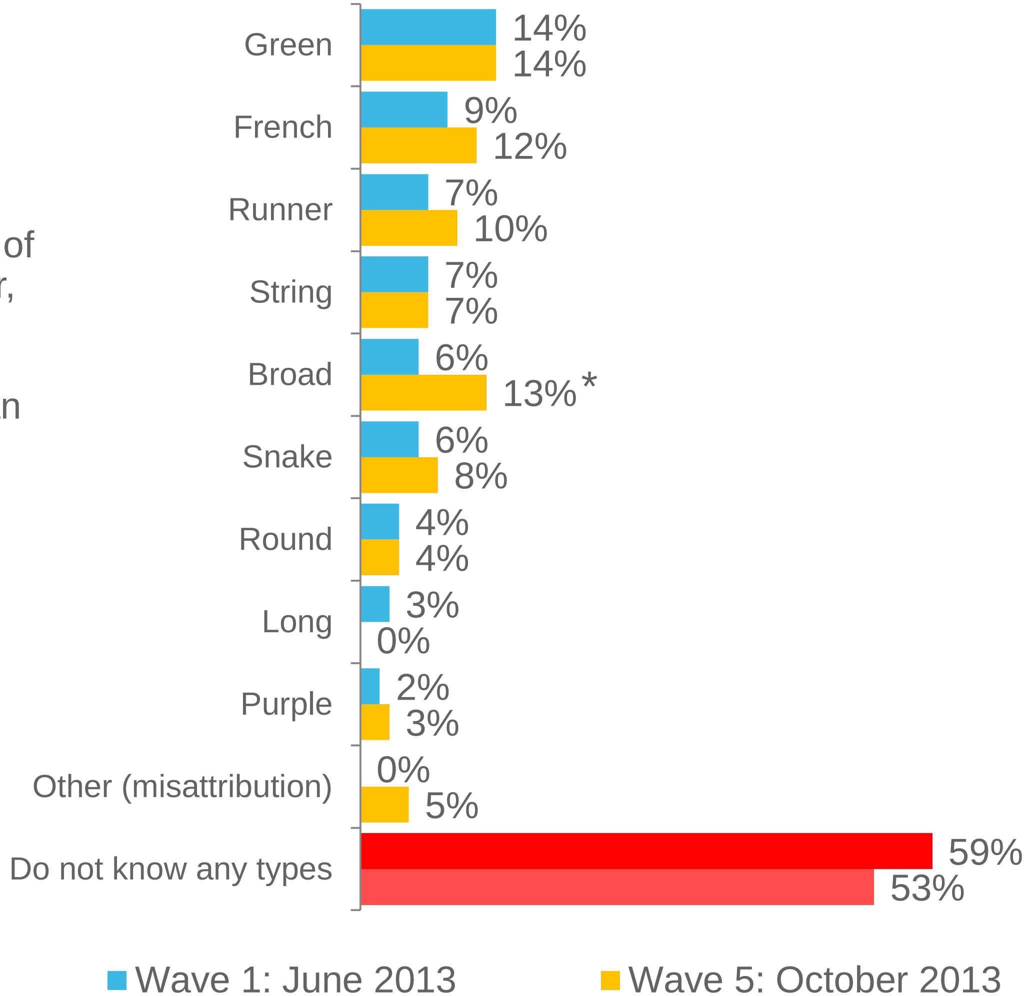
- Compared with Wave 1, the average price of beans was $1.07 higher in October.
- Prices for beans varied by state and retailer. They were most expensive in WA at $12.98/kg and cheapest in $4.98/kg in NSW and TAS.
- The retail range was $8.00 per kg, which is the same price range from Wave 1.

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

Spontaneous Awareness & Purchase

French and Runner Beans

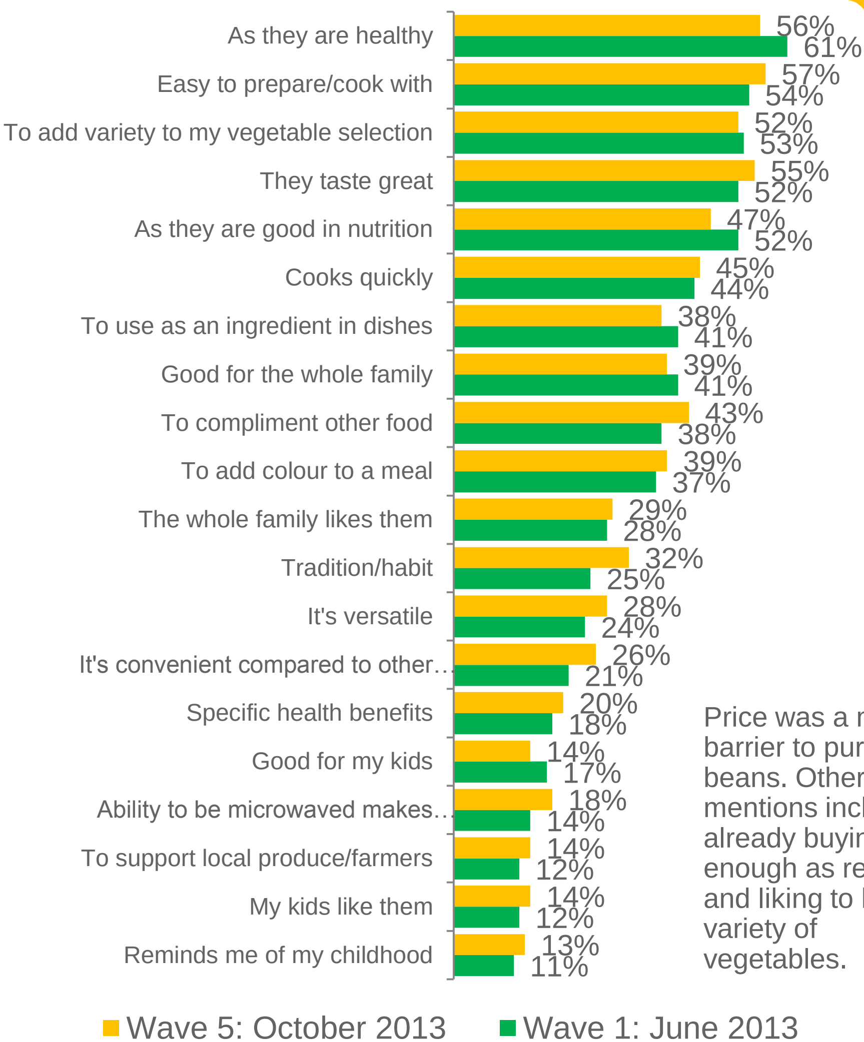
- Compared with Wave 1, awareness of broad beans was significantly higher, up 7%.
- Overall awareness and recall of bean types was low, remaining consistent with Wave 1.



Q6a. What varieties/types of French and runner beans are you aware of? (unprompted)
Wave 1 N=506, Wave 5 N=346
* Indicates significantly higher scores between Waves

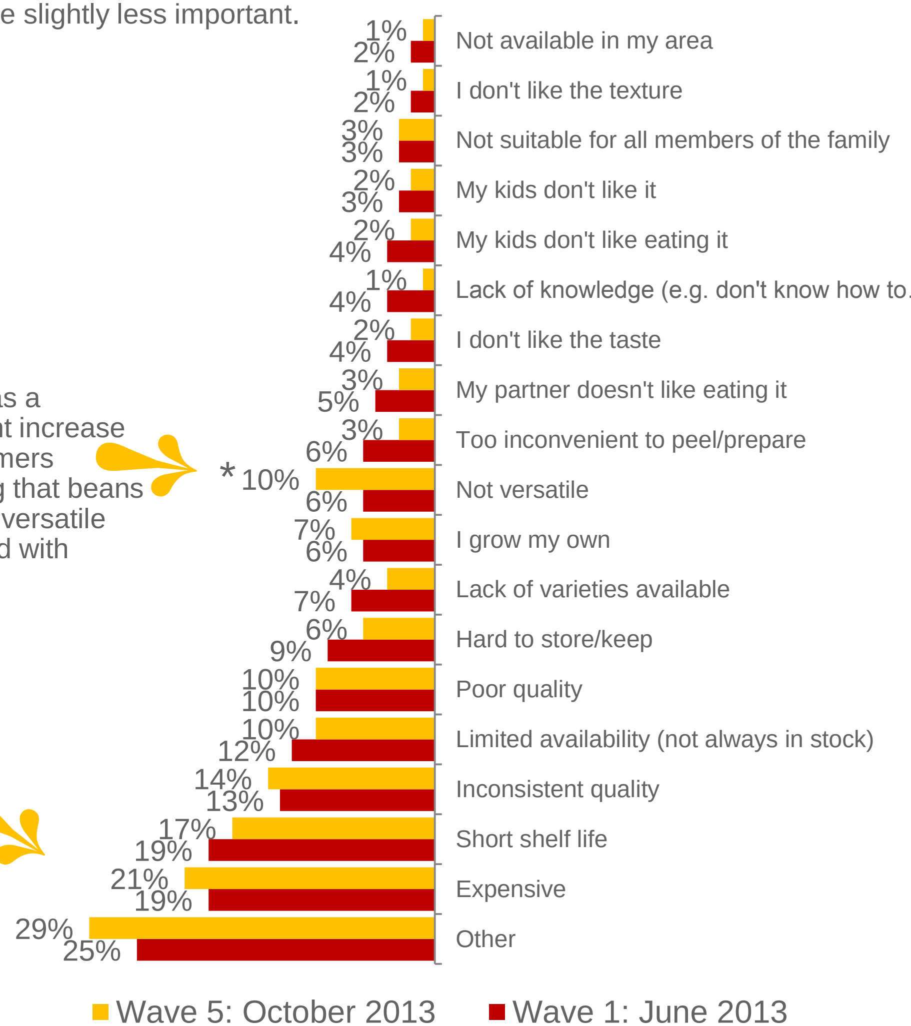
Triggers & Barriers to Purchase
French and Runner Beans

Compared to wave 1, convenience factors had increased as triggers to purchase, while health reasons were slightly less important.



There was a significant increase in consumers indicating that beans were not versatile compared with Wave 1.

Price was a main barrier to purchasing beans. Other mentions included already buying enough as required and liking to have a variety of vegetables.

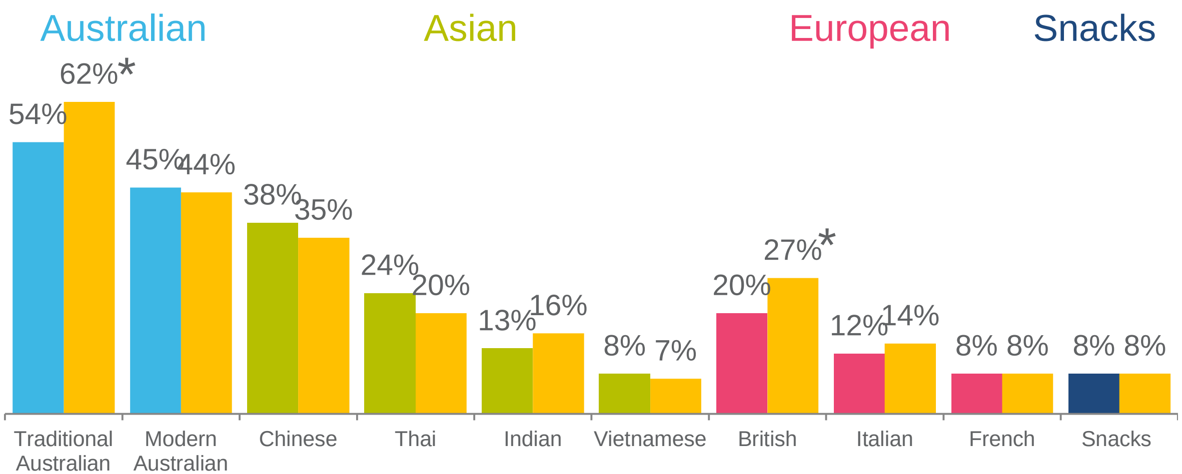


Q7. Which of the following reasons best describes why you purchase French and runner beans?
Q8. Which reason best describes why you don't buy French and runner beans more often?
Wave 1 N=506, Wave 5 N=346
* Indicates significantly higher scores between Waves

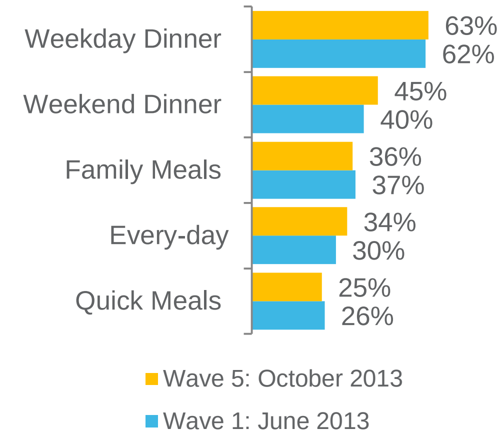
Cooking Preferences & Occasions:
French & Runner Beans

- The current wave showed a significant increase in cooking Traditional Australian and British cuisine compared with Wave 1.
- Consumption occasions remained consistent across waves, with weekday dinners being the top occasion.
- Beans were increasingly served with potatoes and cauliflowers compared with Wave 1.

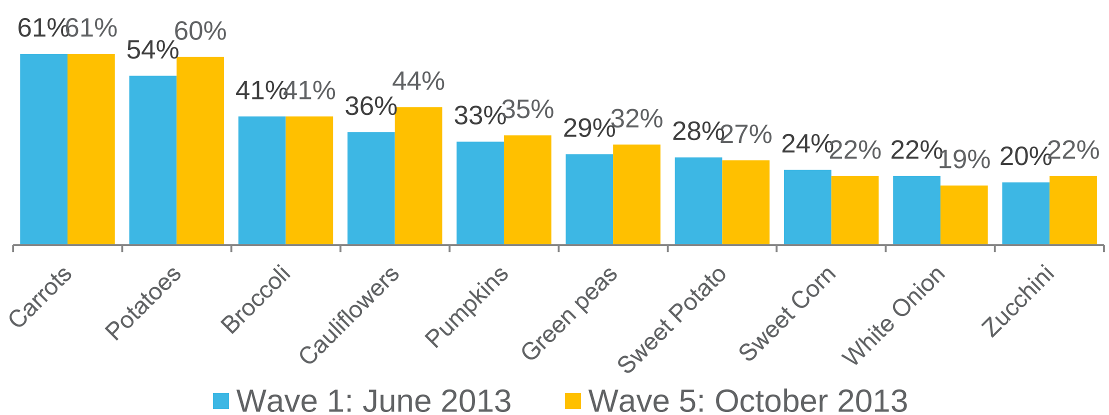
Typical Cuisine Cooked



Top 5 Consumption Occasions



Top 10 Accompanying Vegetables



Top 10 Cooking Styles

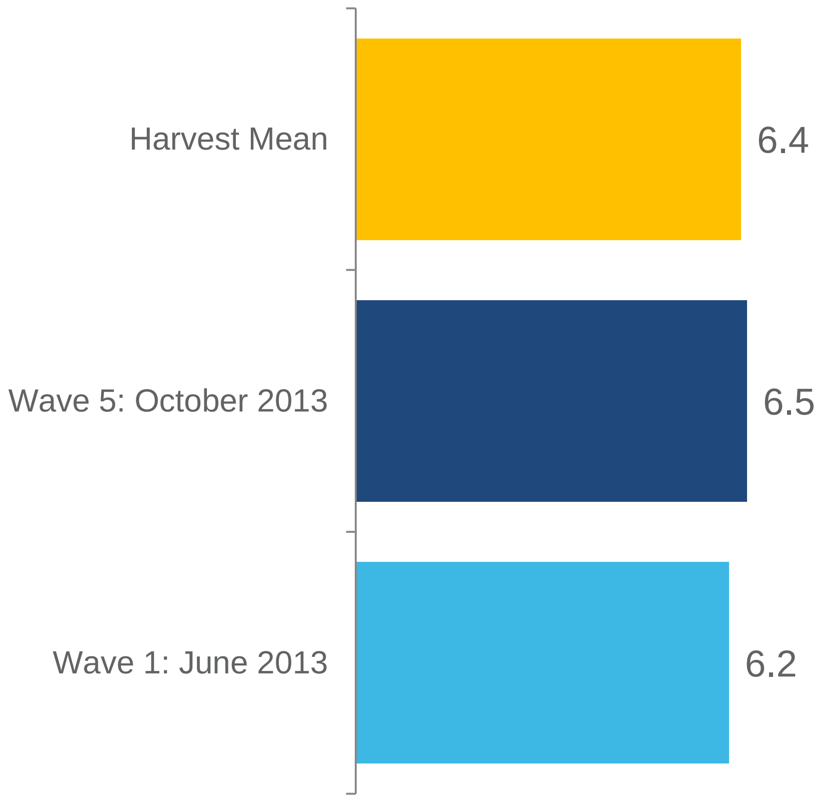
	Wave 1	Wave 5
Steaming	55%	52%
Stir frying	47%	44%
Boiling	42%	42%
Microwave	25%	27%
Soup	16%	12%
Raw	14%	14%
Stewing	12%	9%
Blanche	10%	12%
Sautéing	10%	9%
Frozen	7%	5%

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

Importance of Provenance

French & Runner Beans

- Although not significantly different to Wave 1, trends indicate that provenance may be increasing in importance.



AUSTRALIAN MADE

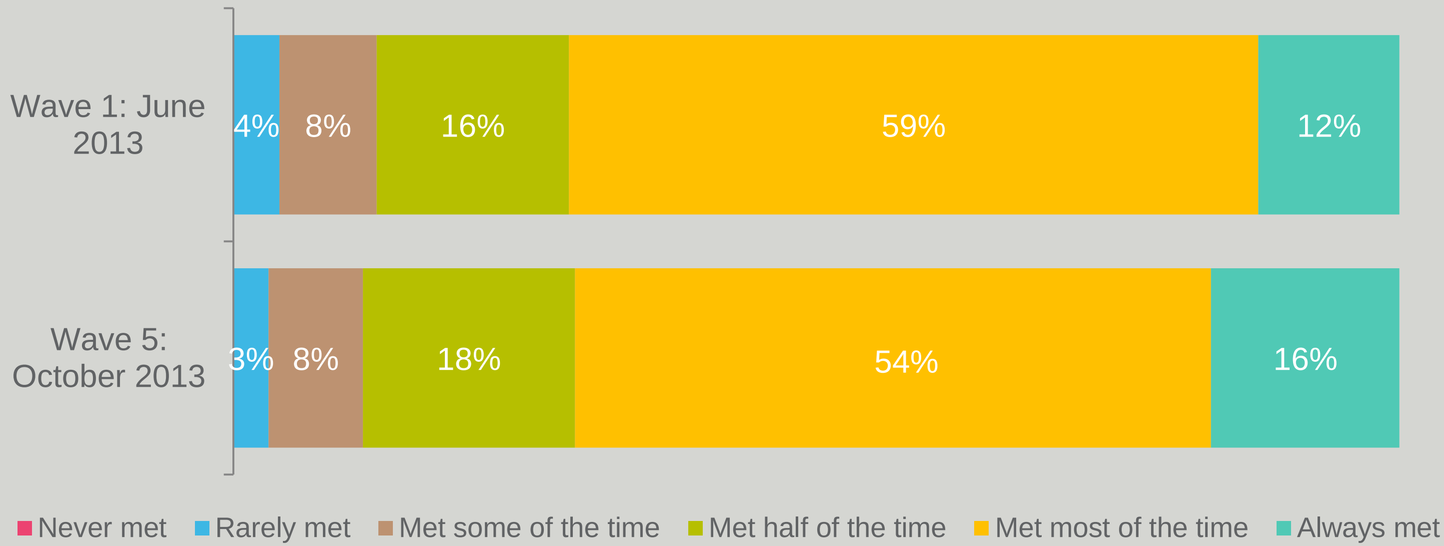
Q14. When purchasing <commodity>, how important is Provenance to you?
Wave 1 N=506, Wave 5 N=346

Freshness and Longevity: French & Runner Beans

Expected
To stay
fresh for
8 days

- Expectations of freshness are on par with Wave 1. Overall, expectations were met at least most of the time for 70% of respondents.
- Respondents expected beans to stay fresh for 8 days, which has slightly increased since Wave 1.

Expectations Met



Q12. How long do you expect French and runner beans to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy French and runner beans?
Wave 1 N=506, Wave 5 N=346

French and Runner Beans Trends

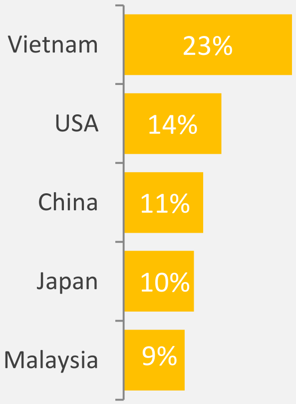
*Green Bean was the search term for Mintel

Bean Global NPDs
August–October 2013

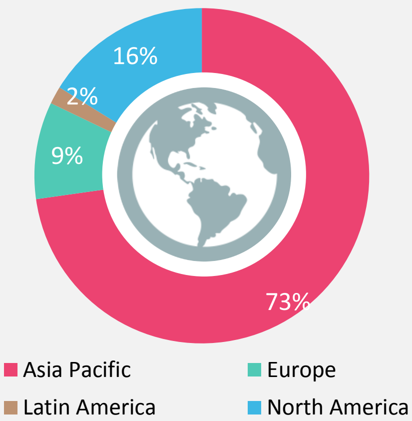
There were 235 new products launched over the last 3 months that contained French and runner beans as an ingredient.
The majority of launches occurred in the Asia Pacific region.
Top category launches were bakery, meals and snacks.

235 Global NPDs

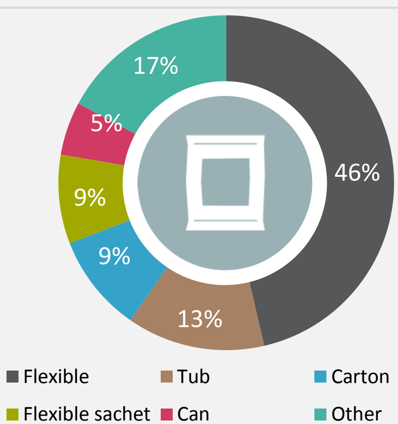
Country



Region



Top Pack Formats



Categories

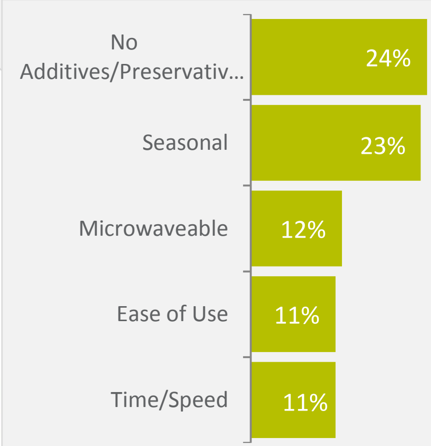
Bakery 31%

Meals 17%

Snacks 11%

Dessert & Ice Cream 6%

Top Claims



French & Runner Beans Product Launches:
Last 3 Months (August–October 2013)
Summary

- A total of 235 products containing French and runner beans as an ingredient were launched globally in the last 3 months, which is considerably higher compared with Wave 1 (133 launches).
- There were no green bean launches in Australia in the last 3 months compared with Wave 1 where there were 29 launches.
- Asia Pacific and North America were the top 2 regions where these products were launched (73% and 16% respectively). Vietnam and the USA were the top 2 countries for launches in the last 3 months (23% and 14% respectively).
- Flexible followed by tub packaging were the 2 top pack formats used for the products launched in the last 3 months (46% and 13% respectively).
- The top categories for product launches were bakery goods (31%), meals (17%) and snacks (11%).
- The core claims used for these launches globally were either health benefit based (e.g. no additives/preservatives 24%) and seasonal (23%).
- The most innovative launches found were: green bean energy cereal drink and green bean ice cream (examples of these products can be found at the end of the French and runner bean trend report).

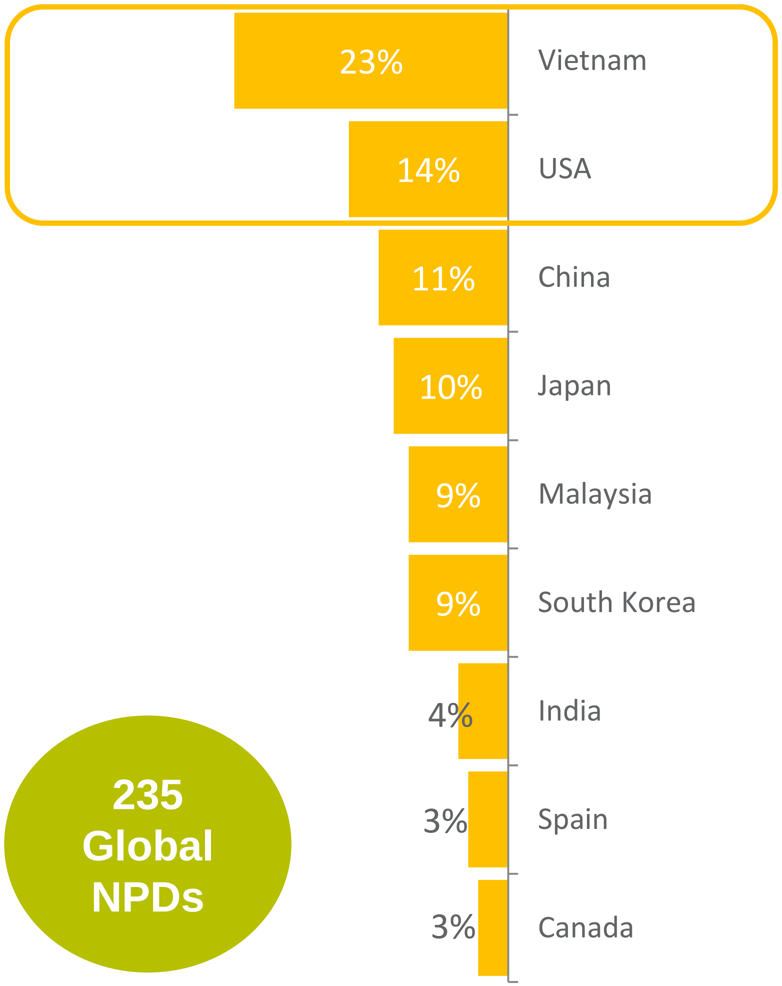
Source: Mintel (2013)

French & Runner Bean Launches

Country, Region & Categories

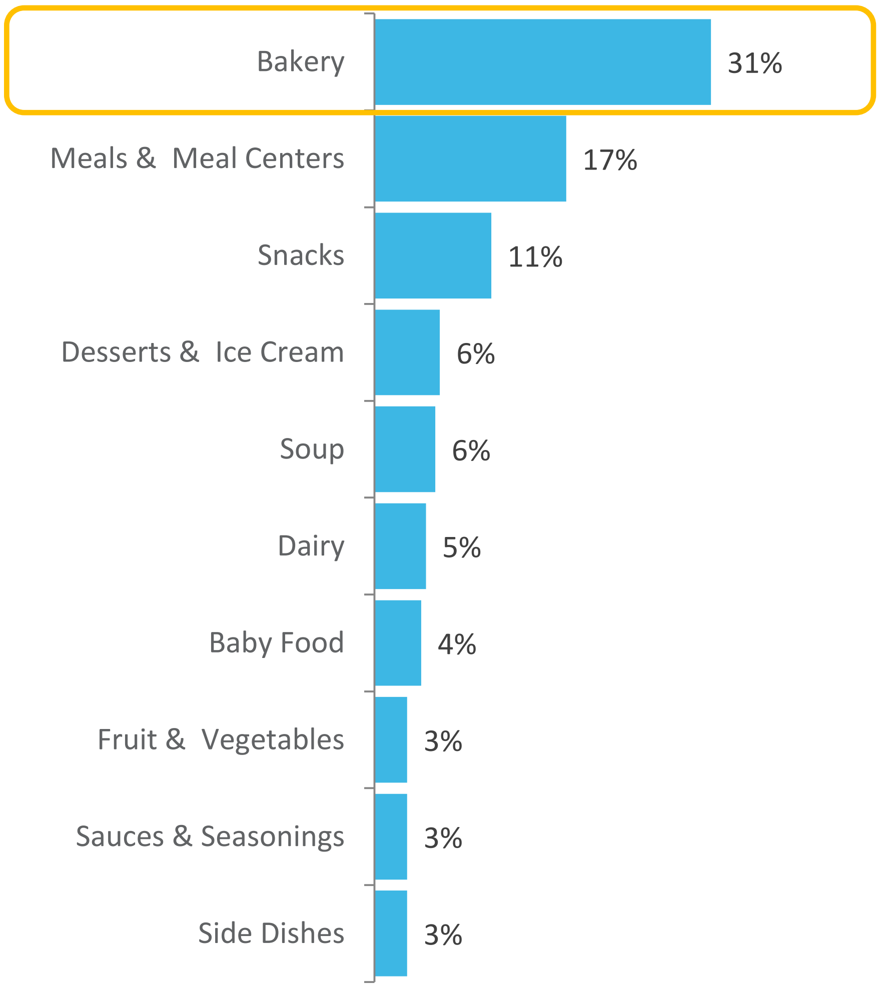
- Vietnam and the USA were the top countries where products were launched.
- Bakery products were the top category of products launched for this period, which is significantly higher compared with Wave 1.

Top Launch Countries



235 Global NPDs

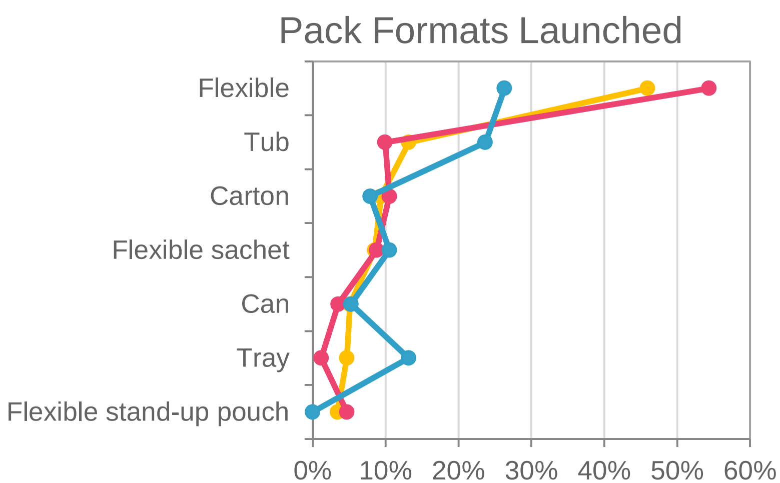
Top Launch Categories

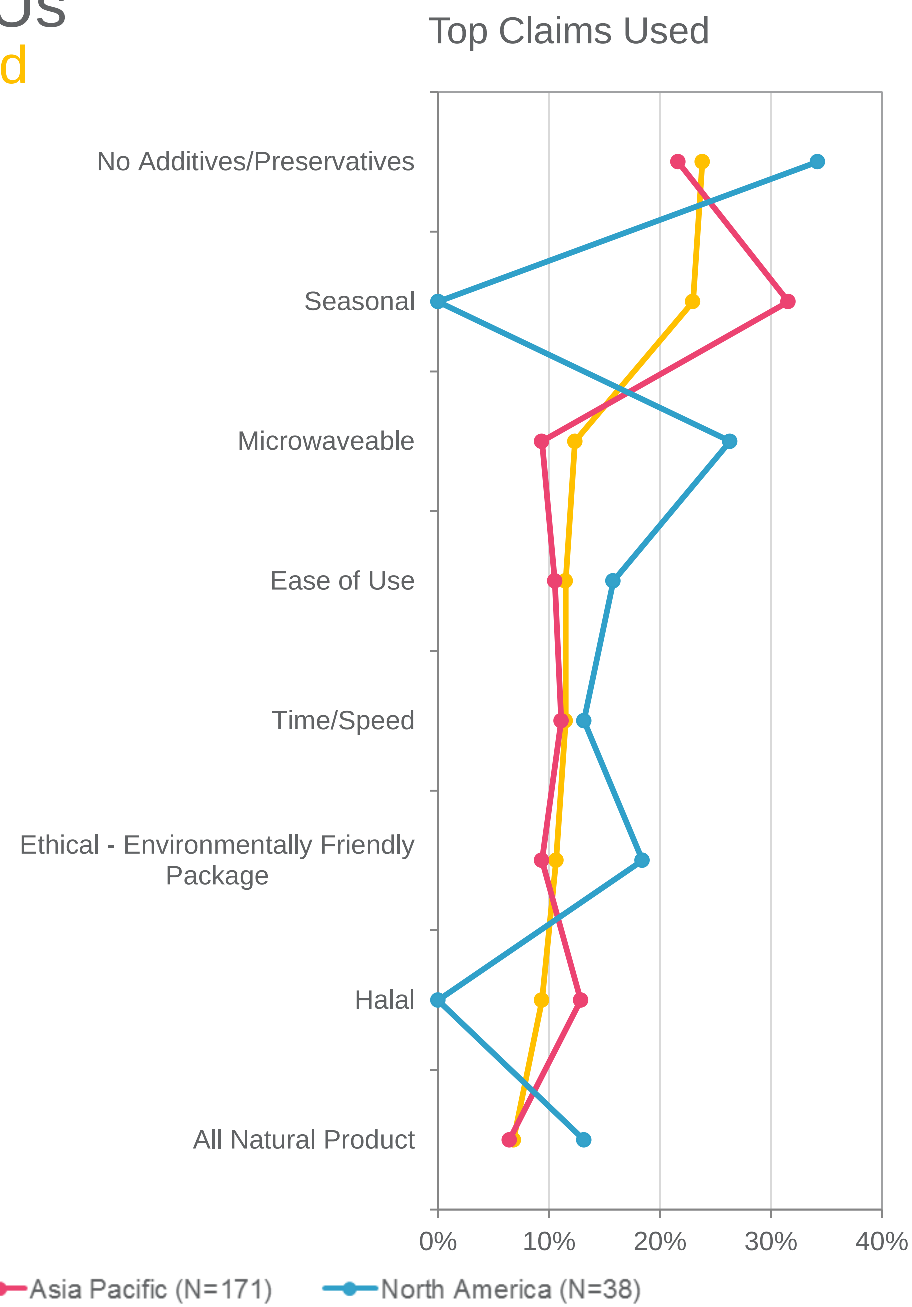


Number of Global Beans NPDs for the L3M N=235

French & Runner Bean SKUs
Top Claims & Pack Formats Used

- The ‘seasonal’ claim used in Asia Pacific may indicate that it is peak season for this commodity and may account for the vast increase in bean launches in the last 3 months.
- Other top claims were no additives/preservatives and convenience claims.
- Globally the top pack formats used product launches was flexible packaging and tubs. This was consistent for all region launches.





Number of Global NPDs for the L3M N=235
Only regions with n >30 are displayed

Innovative French & Runner Bean Launches:
L3M (August–October 2013)

Shendou Three Bean Drink (China)

Shendou San Dou Yin (Three Bean Drink) is made with natural plant extract and is free from sugar. It is free from any additives and preservatives. This product retails in a 248ml pack. The drink is said to cool the body internally and detoxify.

Claims:
Ethical - Charity, No Additives/Preservatives, Other (Functional), Low/No/Reduced Sugar

Tan Viet Pig Shaped in the Muzzle Moon Cake (Vietnam)

Tan Viet Banh Ro Lon Nuong (Pig Shaped in the Muzzle Moon Cake) is now available. It is new to the market to celebrate Mid-Autumn Festival 2013. This product retails in a 50g pack.

Claims:
Seasonal

Co.Op Mart Milk Green Bean Dumplings (Vietnam)

Co.Op Mart Banh Bao Sua Dau Xanh (Milk Green Bean Dumplings) are said to be safe food and premium quality. They can be steamed within 4 -5 minutes. This microwavable product retails in a 300g pack.

Claims:
Premium, Microwaveable

VV / Weiwei Green Bean Energy Cereal Drink (China)

VV / Weiwei Ying Yang Gu Dong Lv Dou Nong Jiang (Green Bean Energy Cereal Drink) has been repackaged and is now available in a newly designed 250ml pack. It contains vegetable protein and coarse fiber. This drink is made with selected green beans and lotus seeds, and is said to be smooth and aromatic.

Claims:
N/A

Source: Mintel (2013)

Innovative French & Runner Bean Launches:
L3M (August–October 2013)

Benbengou Sesame Flavoured Grain Rice Snack (China)

Benbengou Zhi Ma Wei Cu Liang Mi Guo (Sesame Flavoured Grain Rice Snack) is made with 12 types of grains and is free from preservatives. This product retails in a 135g pack.

Claims:
No Additives/Preservatives

Wall's Lv Dou Mei Mei Lv Ye Xian Zong Green Bean Ice Cream (China)

Wall's Lv Dou Mei Mei Lv Ye Xian Zong Lv Dou Sha Bing Gun (Green Bean Ice Cream Stick) has been repackaged and is now available in a newly designed 800g pack containing 10 units. This product is made with pure and aromatic green bean paste.

Claims:
N/A

Thanh Loc Fragranced Tam Rice Lotus Seed and Green Bean Powder (Vietnam)

Thanh Loc Bôt Gao Tám Hat Sen Do Xanh (Fragranced Tam Rice Lotus Seed and Green Bean Powder) is described as a delicious, nutritious and safe food. The premium flour is made with 100% natural ingredients and contains no preservatives. The high quality product retails in a 400g pack.

Claims:
No Additives/Preservatives, All Natural Product, Babies & Toddlers (0-4), Premium

World Market Mixed Vegetable Chips (USA)

World Market Mixed Vegetable Chips comprise sweet potato, taro, squash, carrot, and green bean chips. These chips are a product of Vietnam and retail in a 4-oz. pack.

Claims:
N/A

Source: Mintel (2013)

Innovative French & Runner Bean Launches:

L3M (August–October 2013)

Shen Hui Cu Liang Duo Thick Green Bean Drink (China)

Shen Hui Cu Liang Duo Lv Dou Nong Jiang (Thick Green Bean Drink) is free from preservatives and said to be aromatic and delicious. This product retails in a 250ml pack.

Claims:
No Additives/Preservatives

Huong Nguyen Bai-Ho Lotus Nut Cake (Vietnam)

Huong Nguyen Banh Dau Xanh (Bai-Ho Lotus Nut Cake) has been repackaged and now is available in a newly designed pack. The speciality product is made with green bean and lotus nuts powder and retails in a 330g pack.

Claims:
N/A

Bonduelle Natur+ Vegetable Mix (Spain)

Bonduelle Natur+ Preparado para Ensaladilla (Vegetable Mix) is a mix of potatoes, carrot, green beans, and green peas. This vegetable mix is rich in fibre, has a fresher flavour, and contains less water.The product retails in a 315g pack.

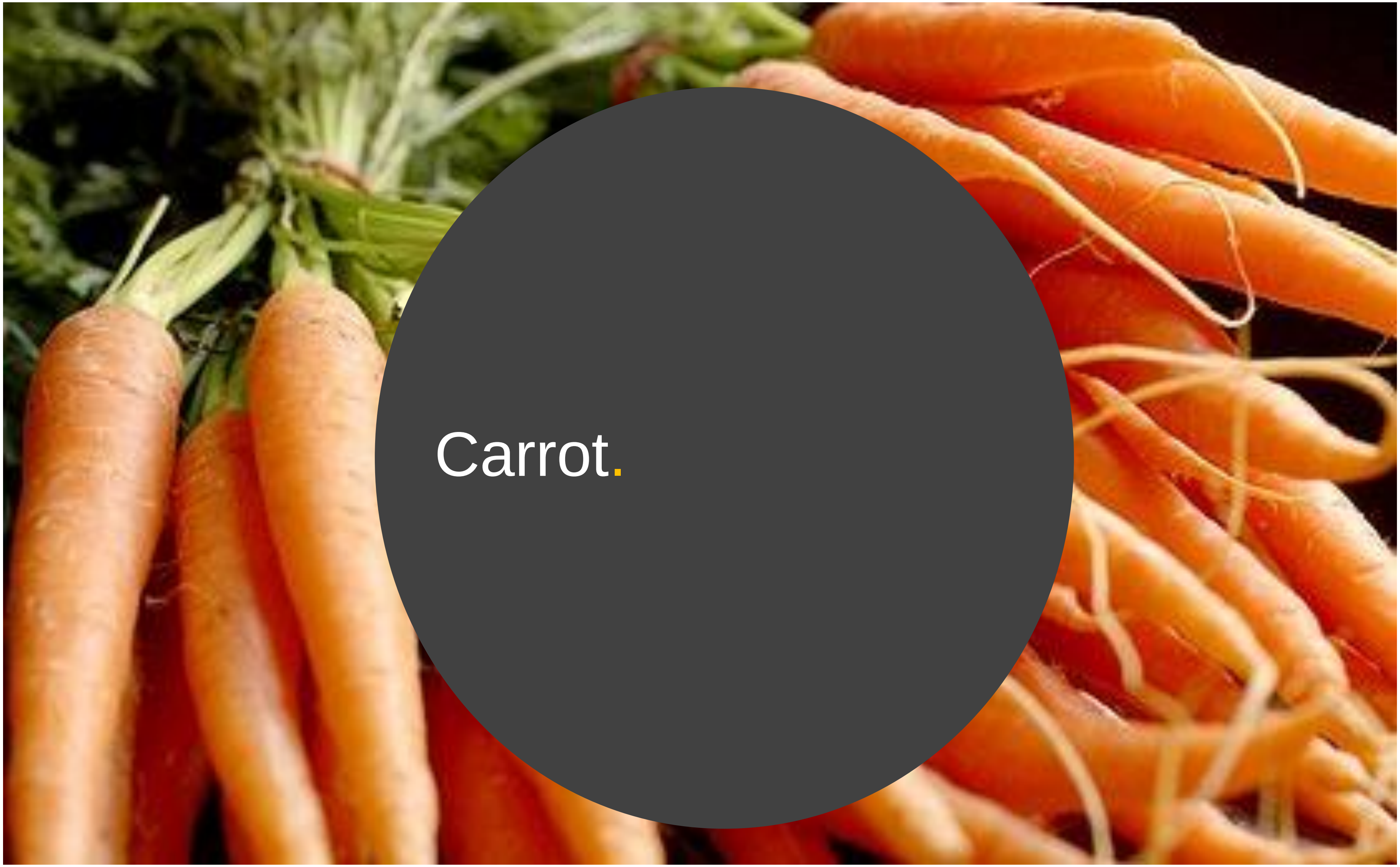
Claims:
No Additives/Preservatives, High/Added Fiber

Dai Phat Foodie Home Chef Kim Sa Cookies (Vietnam)

Dai Phat Foodie Home Chef Banh Kim Sa (Kim Sa Cookies) are now available. Claimed to be ideal for special occasions, the product retails in a pack containing three cakes.

Claims:
N/A

Source: Mintel (2013)


Carrot.

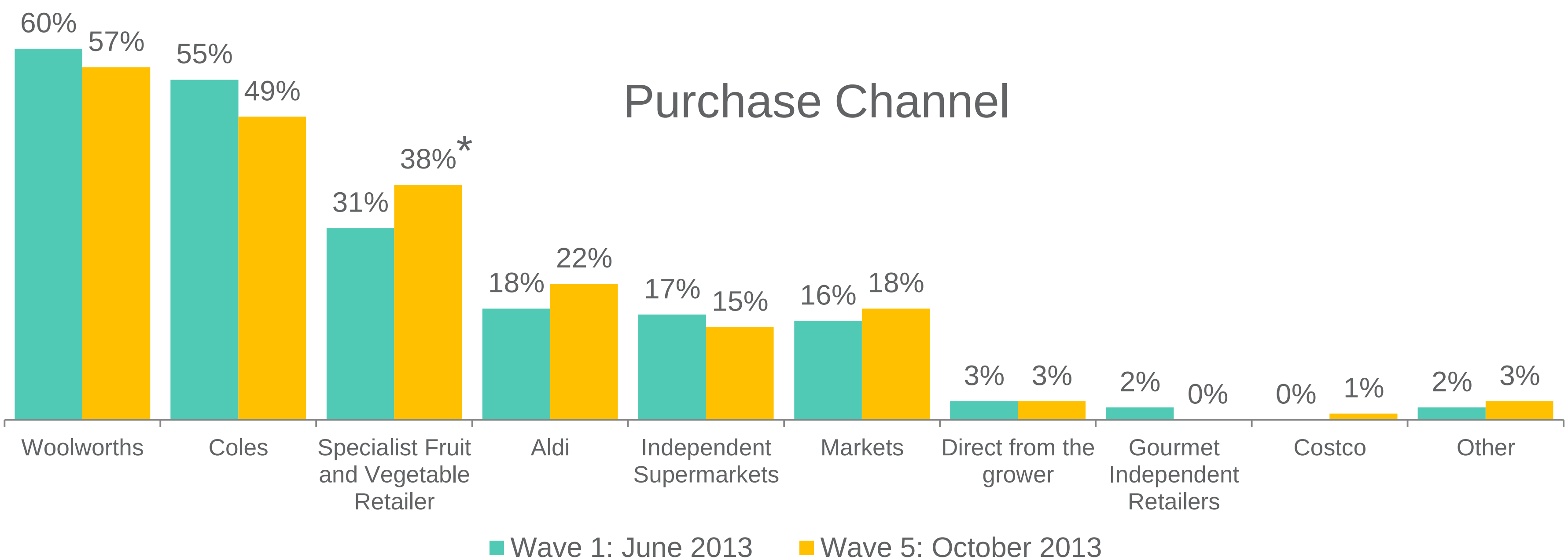
Purchase and Consumption Behaviour

Carrots

Average Purchase **3.9** times per month

Average Consumption **14.5** times per month

- Main retail supermarkets were still the main purchase channel. However, there was a significant increase in purchase from Specialist retailers, compared with Wave 1.
- Carrots are purchased on average once a week and consumed 14.5 times a month, which was on par with Wave 1.



Q1. On average, how often do you purchase carrot?
Q2. On average, how often do you consume carrot?
Q5. From which of the following channels do you typically purchase carrot?
Wave 1 N=511 Wave 5 N=520
* Indicates significantly higher scores between Waves

Average Spend & Price Sensitivity

Carrots

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

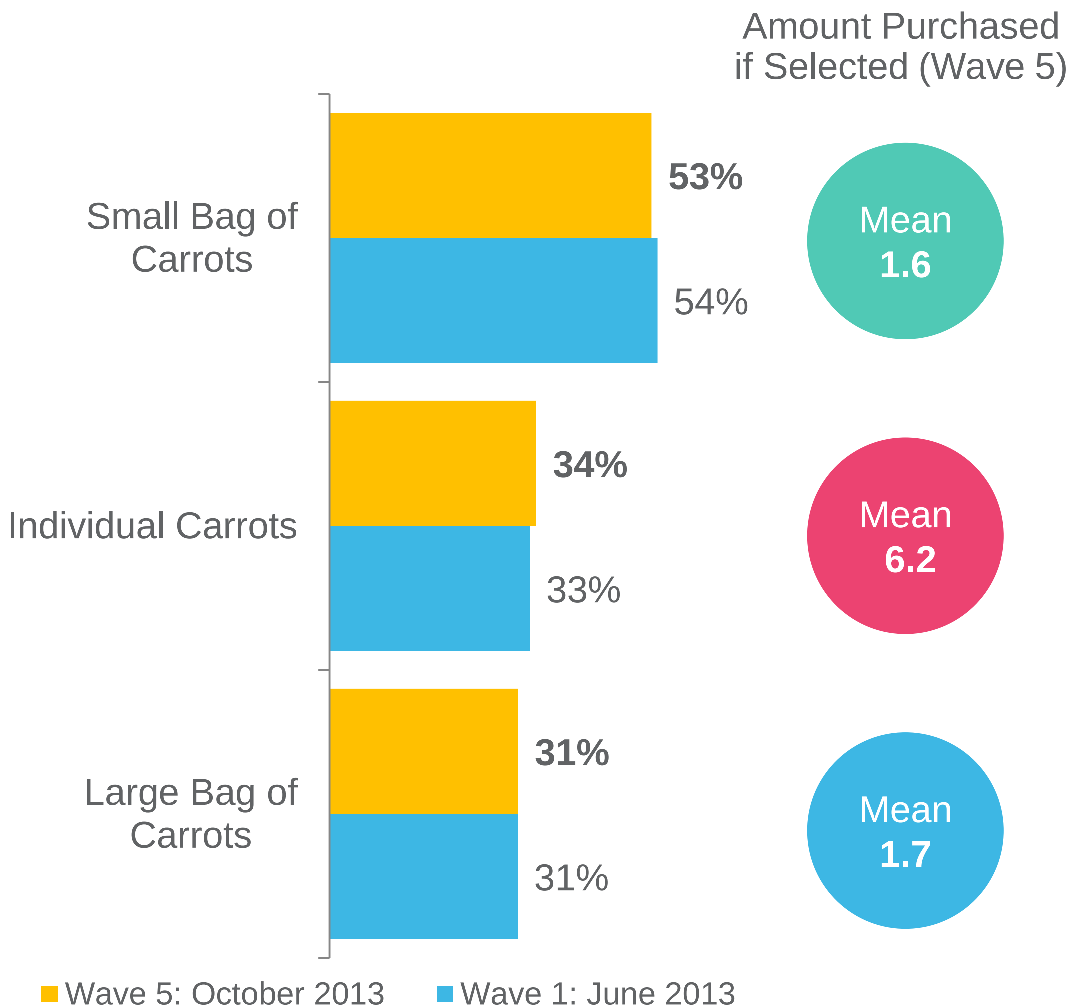
⇛ The average recalled last spend on Carrots was **$2.40,** which is down from $3.40 in Wave 1.

⇛ Consumers perceived the average price for Carrots as very good value for money **(7.3/10).**

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

Pack Formats Purchased

Carrots



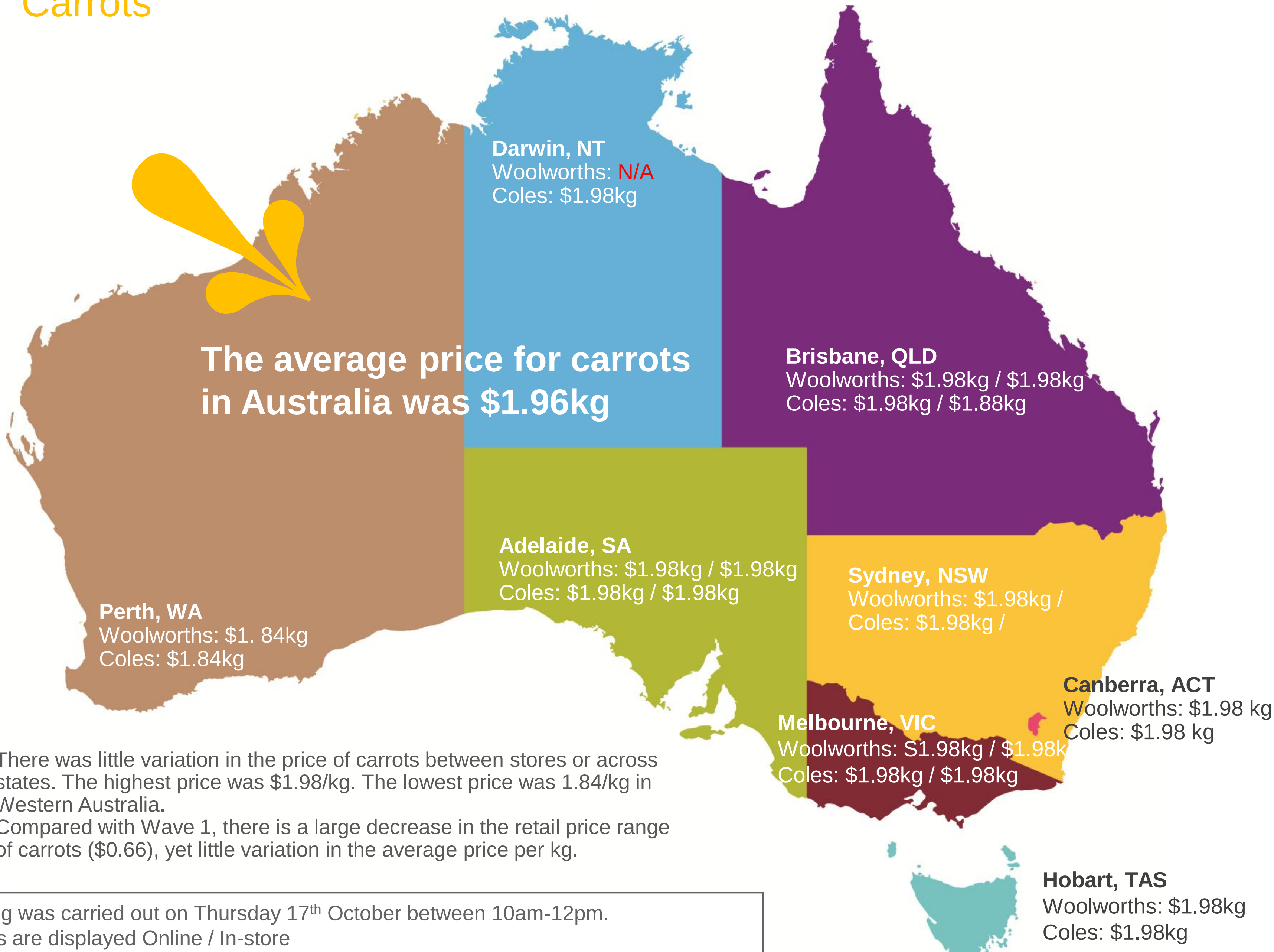
- Small bags of carrots remained the most common pack format purchased.
- All pack formats, and purchase amounts were on par with Wave 1 purchase habits.

Q3a. How much carrot does this typically equate to?

colmar brunton.

Online and In-store Commodity Prices

Carrots



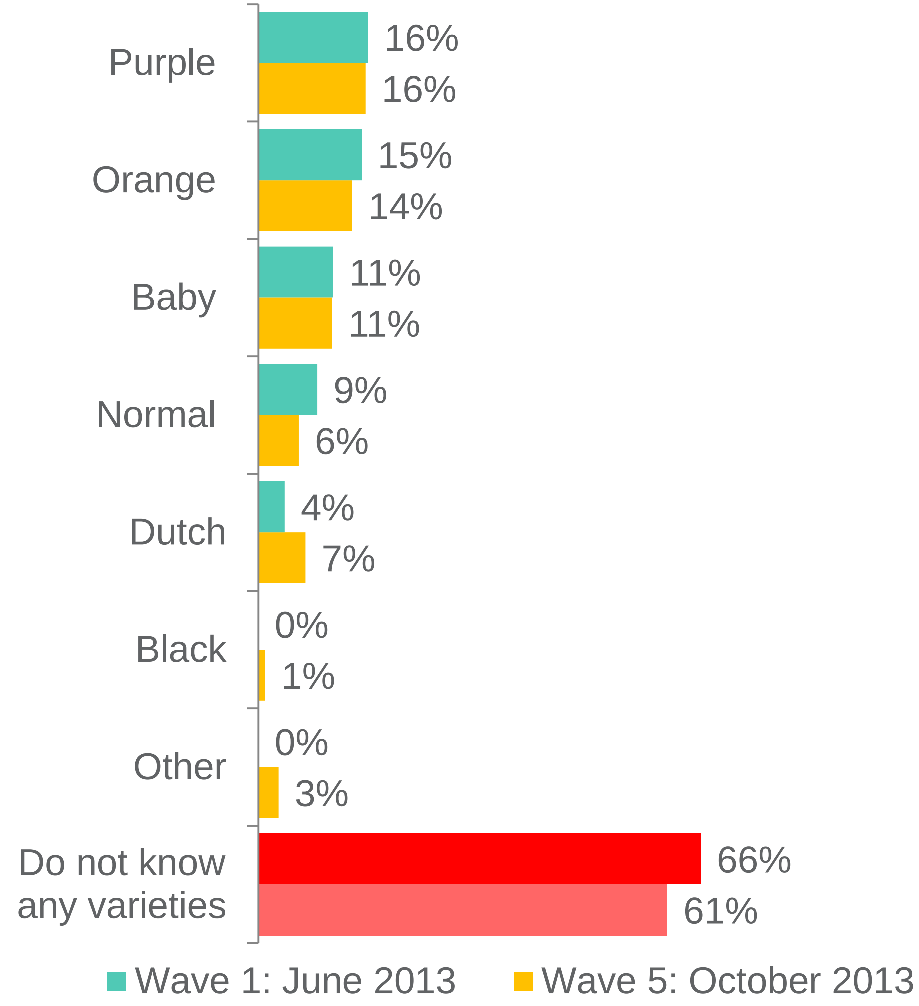
- There was little variation in the price of carrots between stores or across states. The highest price was $1.98/kg. The lowest price was 1.84/kg in Western Australia.
- Compared with Wave 1, there is a large decrease in the retail price range of carrots ($0.66), yet little variation in the average price per kg.

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

Spontaneous Awareness & Purchase

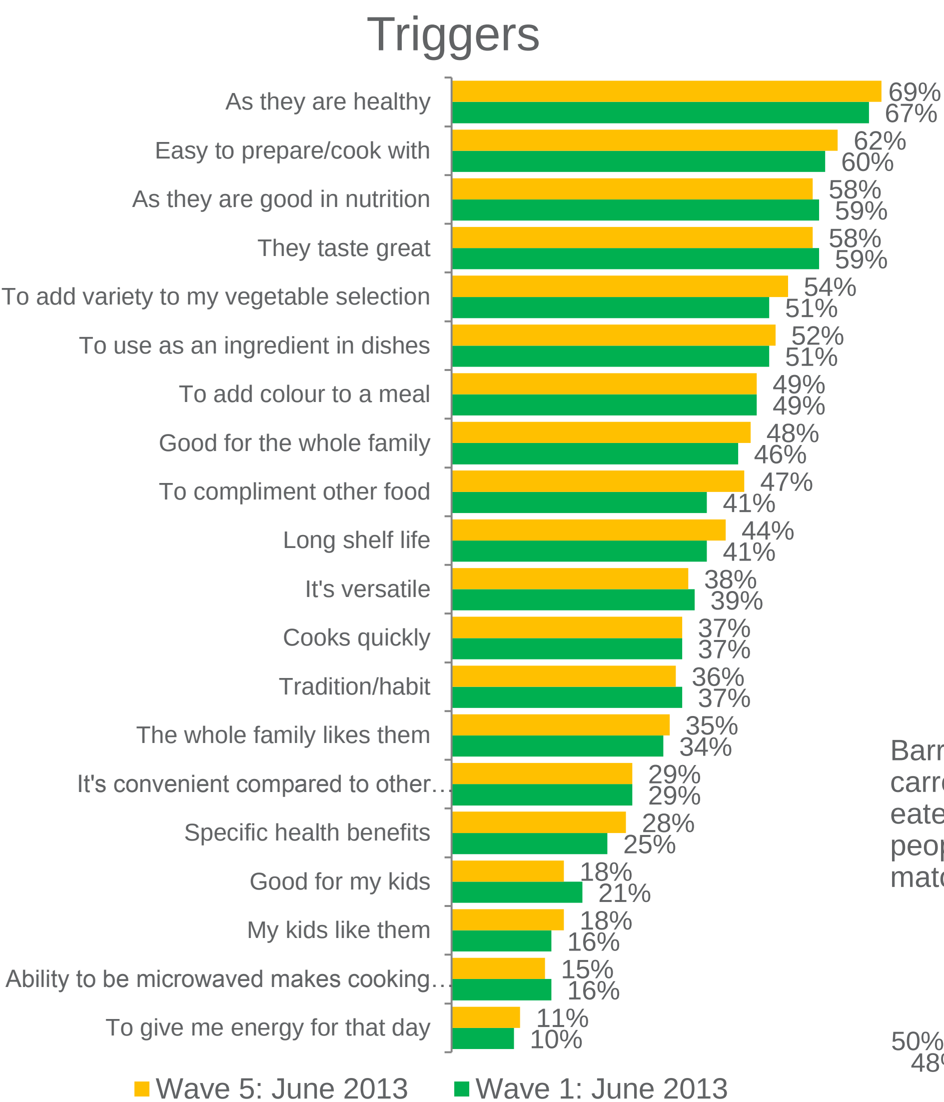
Carrots

- Overall, awareness of carrot types was on trend with Wave 1.
- Carrot awareness was still driven by colour, size and the 'normal' types.
- There was a slight increase in recall of Dutch carrots.



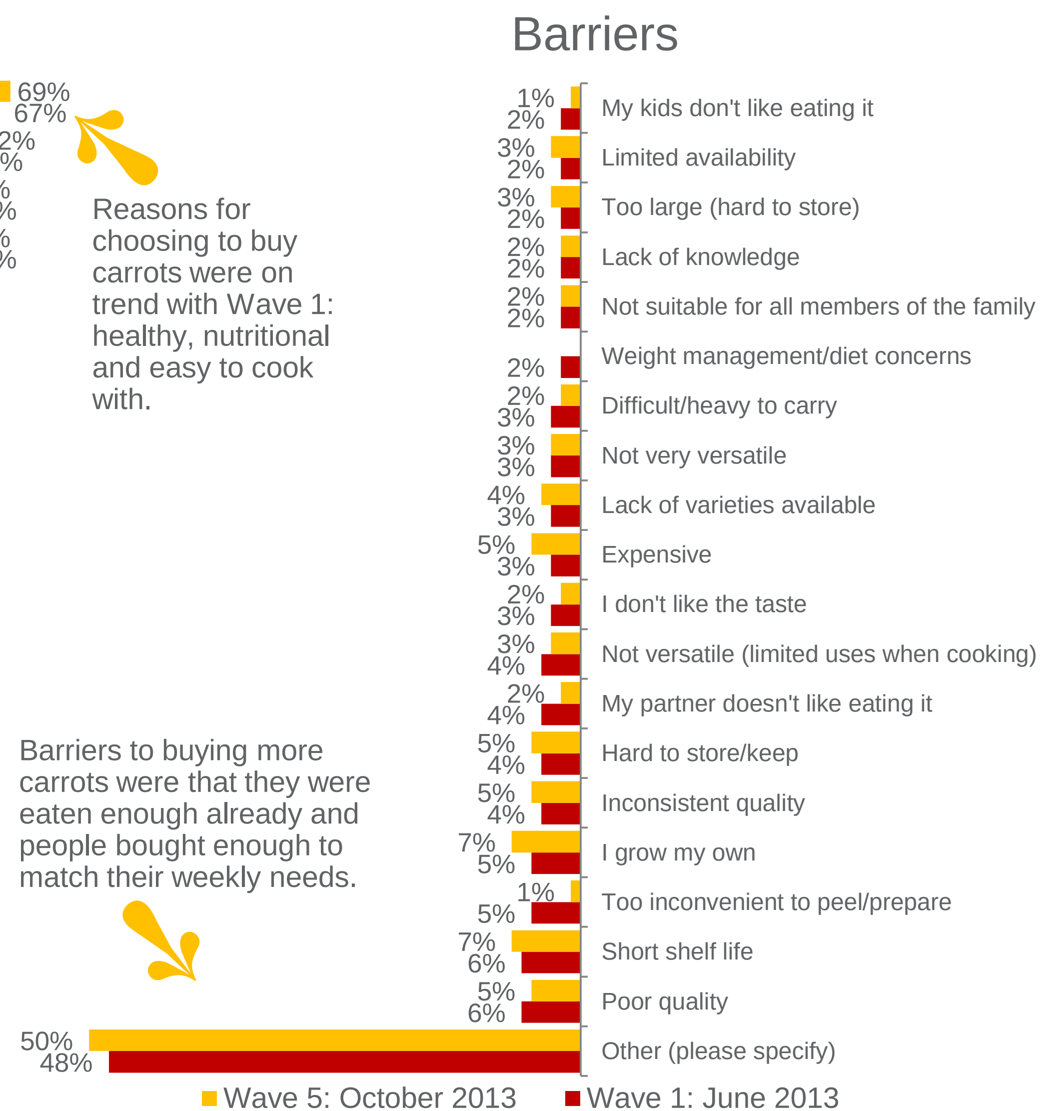
Q6a. What varieties/types of carrot are you aware of? (unprompted)
Wave 1 N=511 Wave 5 N=520

Triggers & Barriers to Purchase
Carrots



Reasons for choosing to buy carrots were on trend with Wave 1: healthy, nutritional and easy to cook with.

Barriers to buying more carrots were that they were eaten enough already and people bought enough to match their weekly needs.

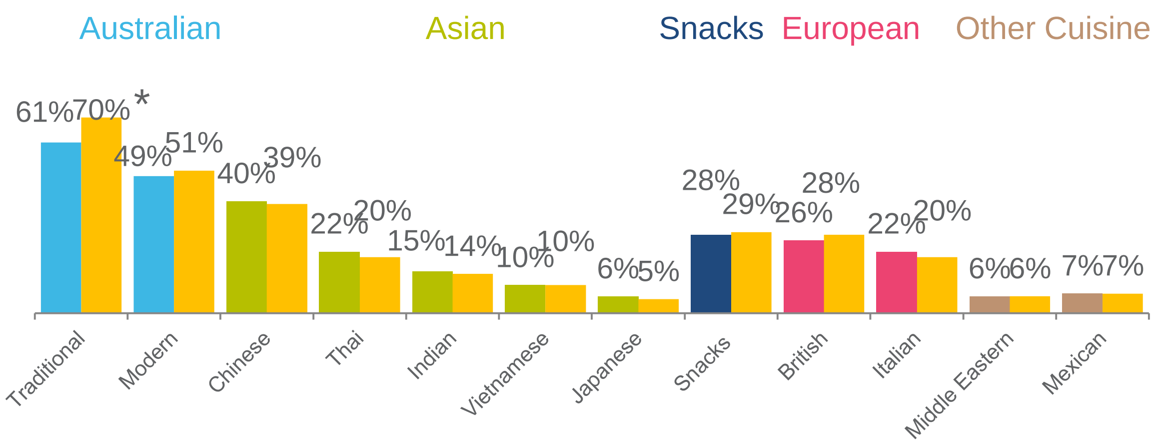


Q7. Which of the following reasons best describes why you purchase carrot?
Q8. Which reason best describes why you don't buy carrot more often?
Wave 1 N=511 Wave 5 N=520

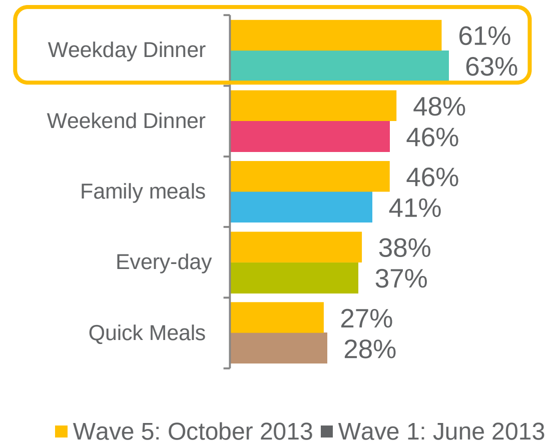
Cooking Preferences & Occasions: Carrot

- There was a significant increase in the proportion of consumers using carrots in Traditional Australian cuisine compared with Wave 1.
- The top consumption occasion remains the weekday dinner.
- There was a slight increase in roasting and stir-frying carrots.

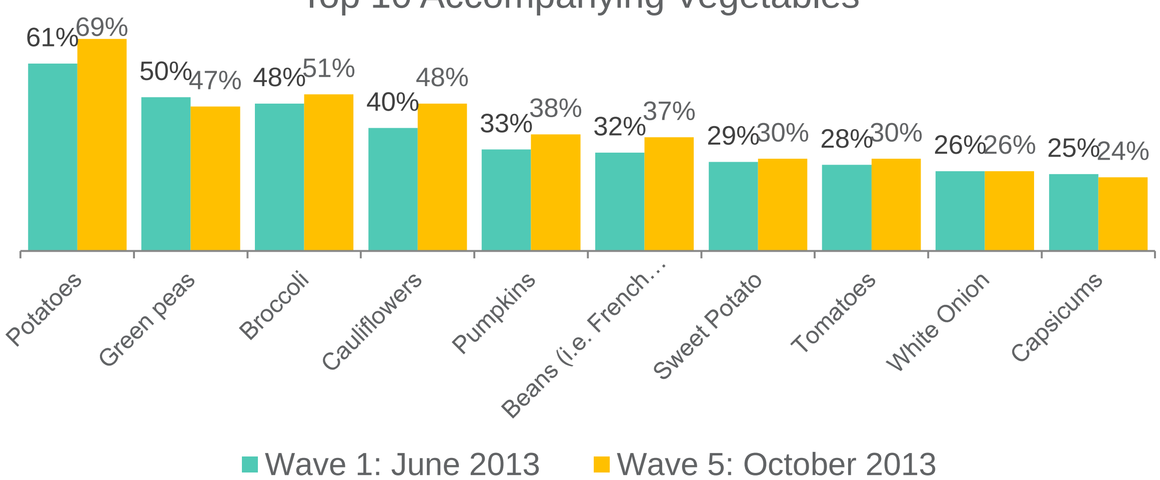
Typical Cuisine Cooked



Top 5 Consumption Occasions



Top 10 Accompanying Vegetables



Top 10 Cooking Styles

	Wave 1	Wave 5
Steaming	50%	48%
Boiling	46%	46%
Roasting	45%	48%
Stir frying	44%	47%
Raw	41%	44%
Soup	32%	34%
Baking	28%	27%
Stewing	27%	26%
Microwave	23%	28%
Mashing	7%	11%

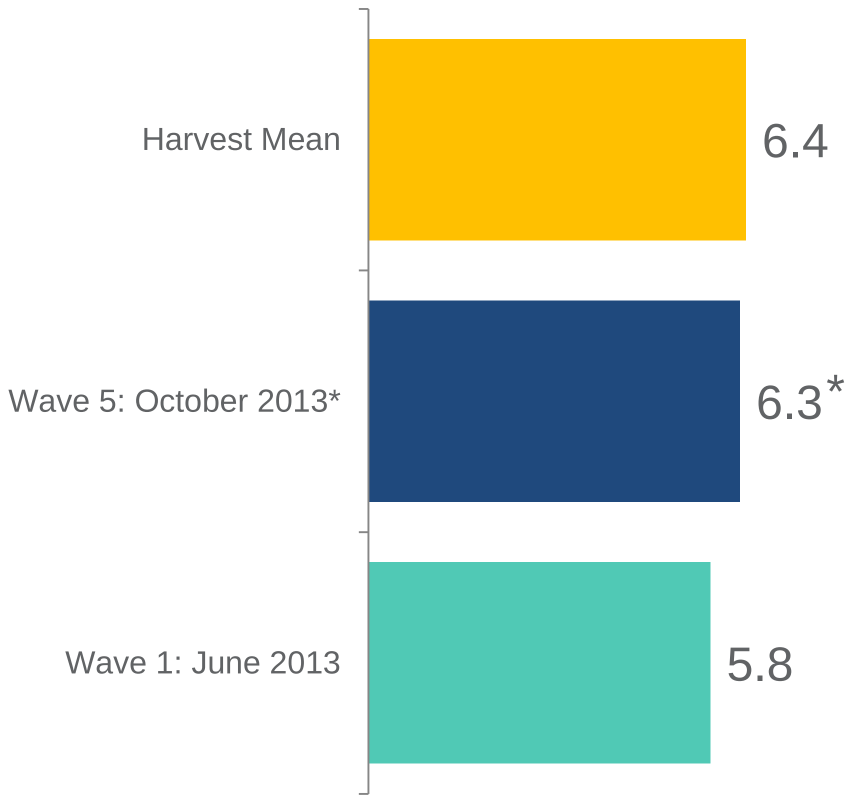
Q9. How do you typically cook carrot?
Q10. What cuisines do you cook/consume that use carrot?
Q10a. And when are you serving carrot which of the following do you also serve together with this?
Q11. Which of the following occasions do you typically consume/use carrot?
* Indicates significantly higher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

colmar brunton.

Importance of Provenance

Carrots

- Provenance was significantly higher in Wave 5 compared with Wave 1. Although importance has increased it is in line with Harvest commodity average.

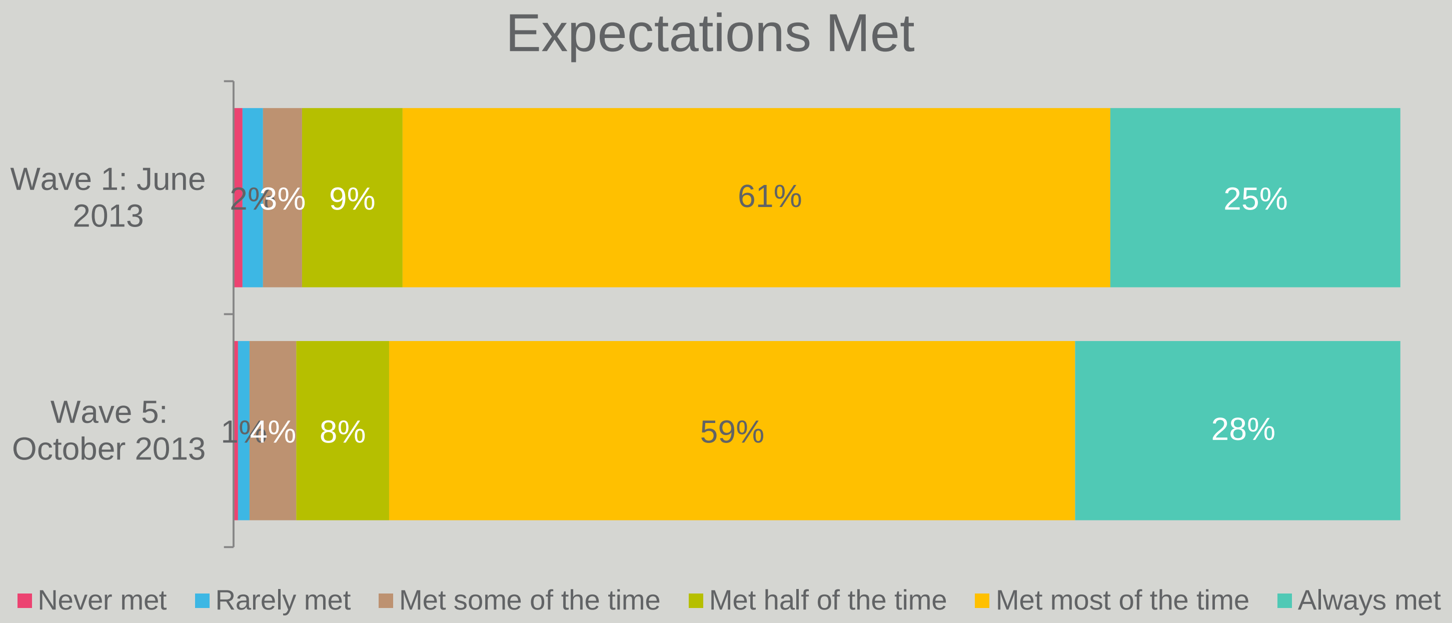


Q14. When purchasing <commodity>, how important is Provenance to you?
Wave 1 N=511 Wave 5 N=520
* Indicates significantly higher scores between Waves

Freshness and Longevity: Carrots

Expected to stay fresh for **12** days

- The proportion of people whose freshness expectation was met all the time increased slightly from Wave 1.
- Average days of freshness were in line with Wave 1.



Q12. How long do you expect carrots to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy carrots?
Wave 1 N=511 Wave 5 N=520

Carrot Trends

Carrot Global NPDs

August–October 2013

There were 1613 new products launched over the last 3 months that contained carrot as an ingredient.
The majority of these launches occurred in Europe and the Asia Pacific regions.
The top categories launches occurred in meals and dairy.

Carrot Product Launches:
Last 3 Months (August–October 2013)
Summary

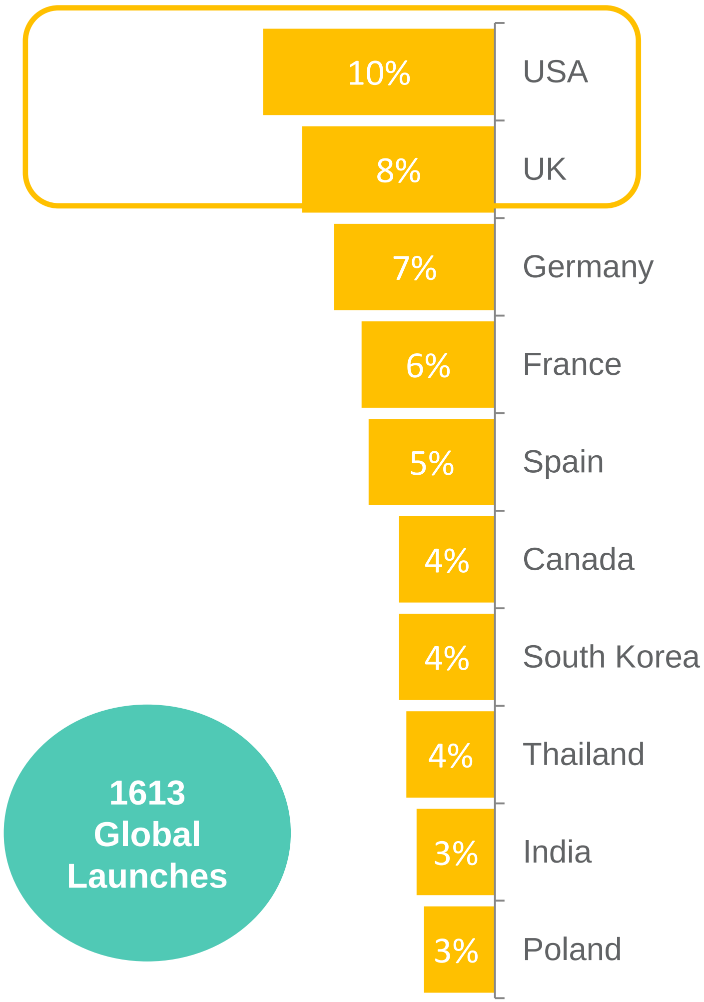
- A total of 1613 products were launched globally in the last 3 months containing carrot as an ingredient. Launches were higher than April-June 2013 (1253 launches).
- 48 carrot-containing products were launched in Australia, which was higher than launches in Wave 1. See slide 57 for the most innovative Australian launches.
- Europe and the Asia Pacific were the 2 top regions where these products were launched (53% and 26% respectively).
- Flexible and tub packaging were the top 2 pack formats used for the products launched (23% and 18% of launches respectively).
- The top categories for product launches were meals (18%), dairy (9%) and soups (9%).
- The top claims used for launches globally were no additives/preservatives (37%), being microwaveable (21%) and environmentally friendly packaging (18%).
- The most innovative launches found were; carrot oil for moisturising the skin and carrot and apple rice cakes for kids (examples of these products can be found at the end of the carrot trend report).

Source: Mintel (2013)

Carrot Launches
Country, Region & Categories

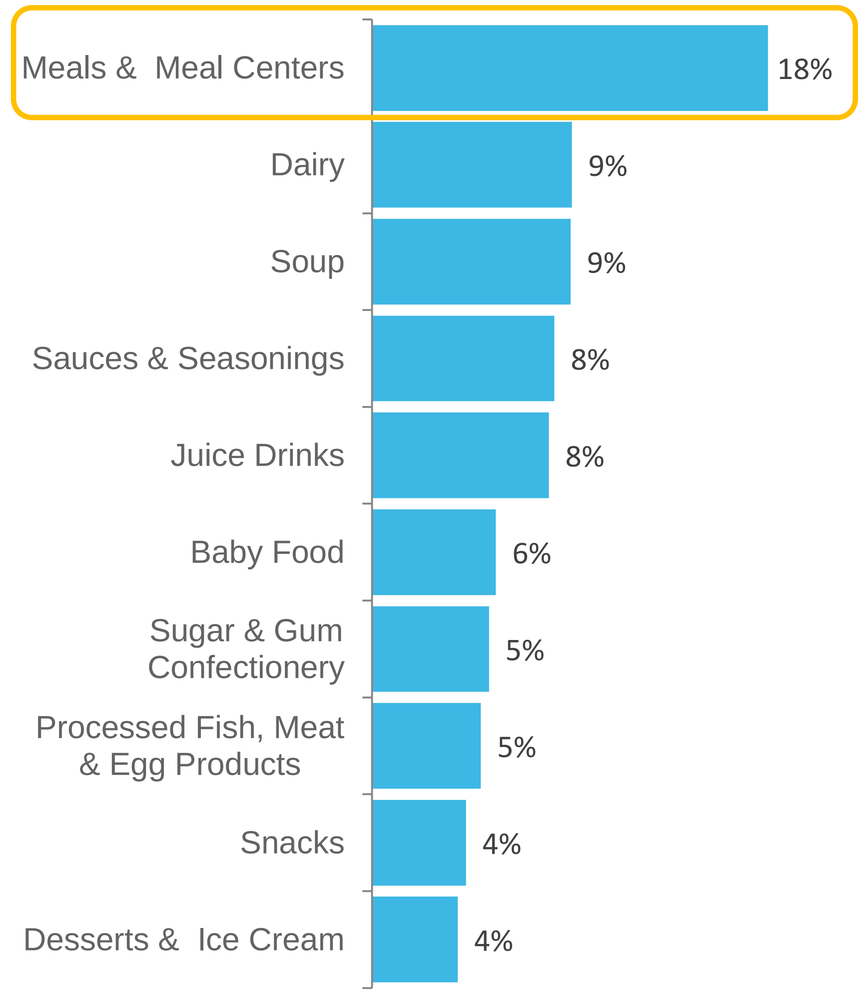
- The most active countries for launches in the last 3 months were the USA, UK & Germany, which is on trend with Wave 1 launches.
- The main categories for launches were meals, dairy products and soup.

Top 10 Launch Countries



1613 Global Launches

Top 10 Launch Categories

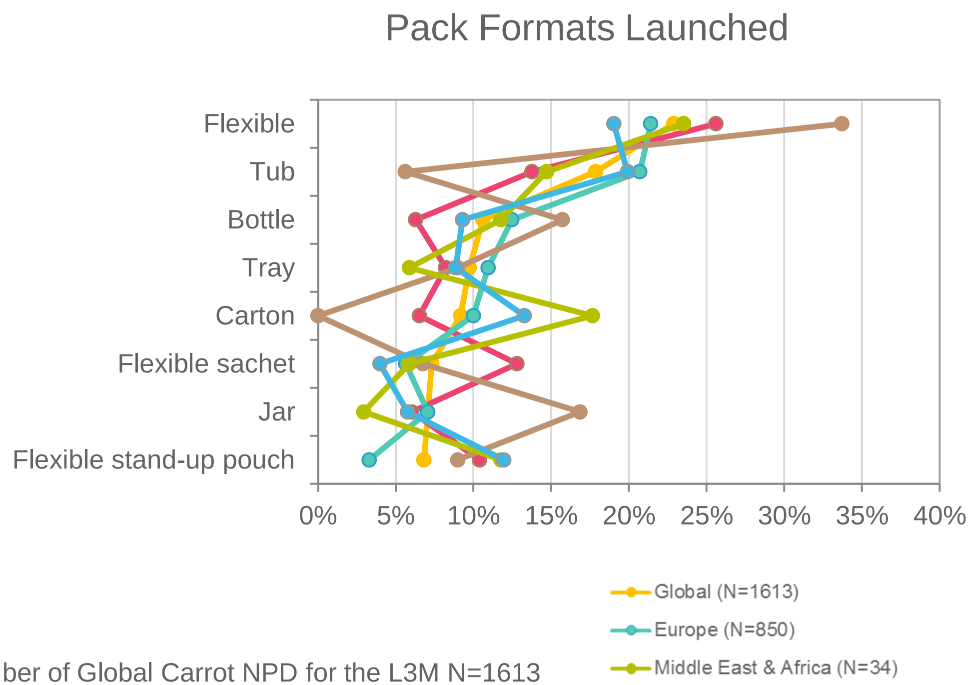


Number of Global Carrot NPD for the L3M N=1613

Carrot Launches

Top Claims & Pack Formats Used

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



Number of Global Carrot NPD for the L3M N=1613

Innovative Carrot Launches:
L3M (August–October 2013)

Ashoka Mixed Pickle in Virgin Olive Oil (UK)

Ashoka Mixed Pickle in Virgin Olive Oil is new to the range. This pickle combines unique Indian flavours with virgin olive oil and retails in a 300g pack.

Claims:
N/A

Vaasan Oat Bread with Carrot (Finland)

Vaasan Kaurasydän Porkkana (Oat Bread with Carrot) is a fibre rich 100% oat bread with carrot flavour, claimed to help reduce cholesterol. This lactose free product is retailed in a 380g pack.

Claims:
Low/No/Reduced Lactose, No Additives/Preservatives, Low/No/Reduced Allergen, Cardiovascular (Functional), High/Added Fiber

Florida's Natural Halloween Fruit Snacks Variety Pack (Canada)

Florida's Natural Halloween Fruit Snacks Variety Pack has been repackaged in a newly designed 1kg recyclable pack containing 200 x 5g units. The pack comprises Fruit Grove Nuggets, Berrillicious Nuggets, and Fruit Punch Nuggets.

Claims:
No Additives/Preservatives, Low/No/Reduced Allergen, Seasonal, Ethical - Environmentally Friendly Package, Kosher, Low/No/Reduced Fat, Gluten-Free, Antioxidant, Children (5-12)

Tyrrell's Hand Cooked Vegetable Crisps (Spain)

Tyrrell's Chips de Vegetales (Hand Cooked Vegetable Crisps) are now available in a newly designed 150g pack. The vegan product consists of beetroot, parsnip, and carrot crisps with a pinch of sea salt, and is free of gluten and artificial additives.

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

Source: Mintel (2013)

Innovative Carrot Launches:
L3M (August–October 2013)

Dermaclay Cosmétique Active Bio Carrot Milk (France)

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

Claims:
No Additives/Preservatives, For Sensitive Skin, Paraben Free, Organic, Botanical/Herbal, Cleansing*, UV Protection, Ethical - Animal, Dermatologically Tested, Moisturising / Hydrating, GMO-Free

Gallo Spinach, Carrot, Green Beans and Tomato Vegetable Pasta (Spain)

Gallo Spaghetti con Sabor Espinaca, Zanahoria, Judía Verde y Tomate (Spinach, Carrot, Green Beans and Tomato Vegetable Spaghetti) has been relaunched with a new brand name. The product retails in a newly designed 500g pack containing five portions.

Claims:
N/A

Gustaf Bong Vegetable Soup with Mini Meatballs (Sweden)

Gustaf Bong Grönsakssoppa med Miniköttbullar (Vegetable Soup with Mini Meatballs) is a creamy soup with the taste of sun-ripened vegetables and savoury mini meatballs. The ready to serve soup retails in a 755ml recyclable pack, providing three portions.

Claims:
Ease of Use, Ethical - Environmentally Friendly Package

Seven & I Premium 100% Vegetable Juice (Japan)

Seven & I Premium Yasai 100 (100% Vegetable Juice) is formulated with 36 different vegetables. According to the manufacturer 1 cup (200ml) contains the daily required amount of vegetables which is 350g. The juice is free from added sugar, sodium, and flavouring.

Claims:
No Additives/Preservatives, Vitamin/Mineral Fortified, Ethical - Environmentally Friendly Package, Low/No/Reduced Sugar, Low/No/Reduced Sodium, Premium, Economy

Source: Mintel (2013)

Innovative Carrot Launches:
L3M (August–October 2013)

Hong Hao Vegetarian Fried Rice with Taro (Thailand)

Hong Hao Vegetarian Fried Rice with Taro is available for the Vegetarian Festival 2013. It contains no MSG or preservatives and is suitable for jain vegetarians. The microwavable product retails in a 250g pack.

Claims:
No Additives/Preservatives, Seasonal, Vegan, Microwaveable, No Animal Ingredients, Vegetarian

Melvita Carrot Oil (France)

Melvita Huile de Carotte (Carrot Oil) is now available in a newly designed 50ml pack featuring the One Voice (not tested on animals) and Imprim'Vert logos, made from sustainably managed forests and printed with vegetable inks. The product is designed to provide a natural tan and soften skin.

Claims:
No Additives/Preservatives, All Natural Product, Brightening / Illuminating*, Botanical/Herbal, Ethical - Animal, Organic, Antioxidant

Vitafusion MultiVites Gummy Vitamins for Adults (Canada)

Vitafusion MultiVites Gummy Vitamins for Adults feature natural source berry, lemon, and orange flavoured gummy vitamins that help maintain good health. This gluten-free product retails in a pack containing 70 units. The dosage is one gummy twice a day.

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

Laziza International Gajar Halwa Dessert Mix (UK)

Laziza International Gajar Halwa Dessert Mix is new to the range. This carrot-based mix can be prepared by combining with milk and water, then frying in ghee. It has been product using top quality ingredients and under strict quality control checks, and retails in a 150g pack.

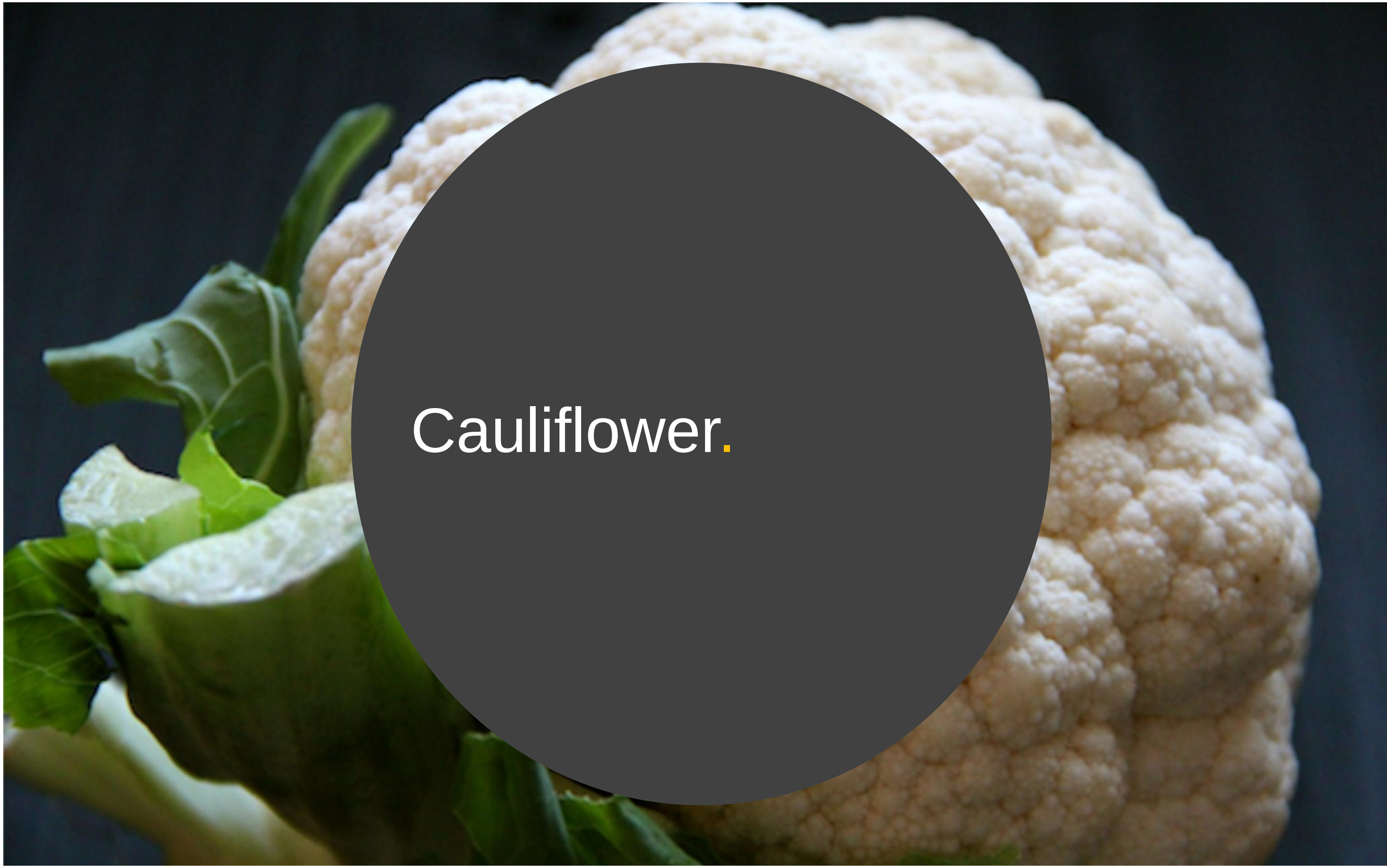
Claims:
N/A

Source: Mintel (2013)

Top Australian Carrot Launches:
L3M (August–October 2013)

V8 Smoothies Apple & Pink Guava Smoothie 	**Sugar & Spice Carrot Cake** 	**Only Organic Carrot & Apple Mini Rice Cakes** 	**Sunraysia Organic Carrot Orange & Apple Juice** 
Fino Premium Citrus Flavoured Jells 	**San Remo La Pasta Chicken Flavour Risoni Pasta** 	**Maggie Beer Vegetable Stock** 	**Pitango Vegetable & Quinoa Organic Soup** 
Black & Gold Minestrone Soup 	**Coles Moroccan Salad Kit** 	**Mamia Garden Vegetables & Rissoni Pasta** 	**Piatti Fresh Beef Ravioli** 

Source: Mintel (2013)



Cauliflower.

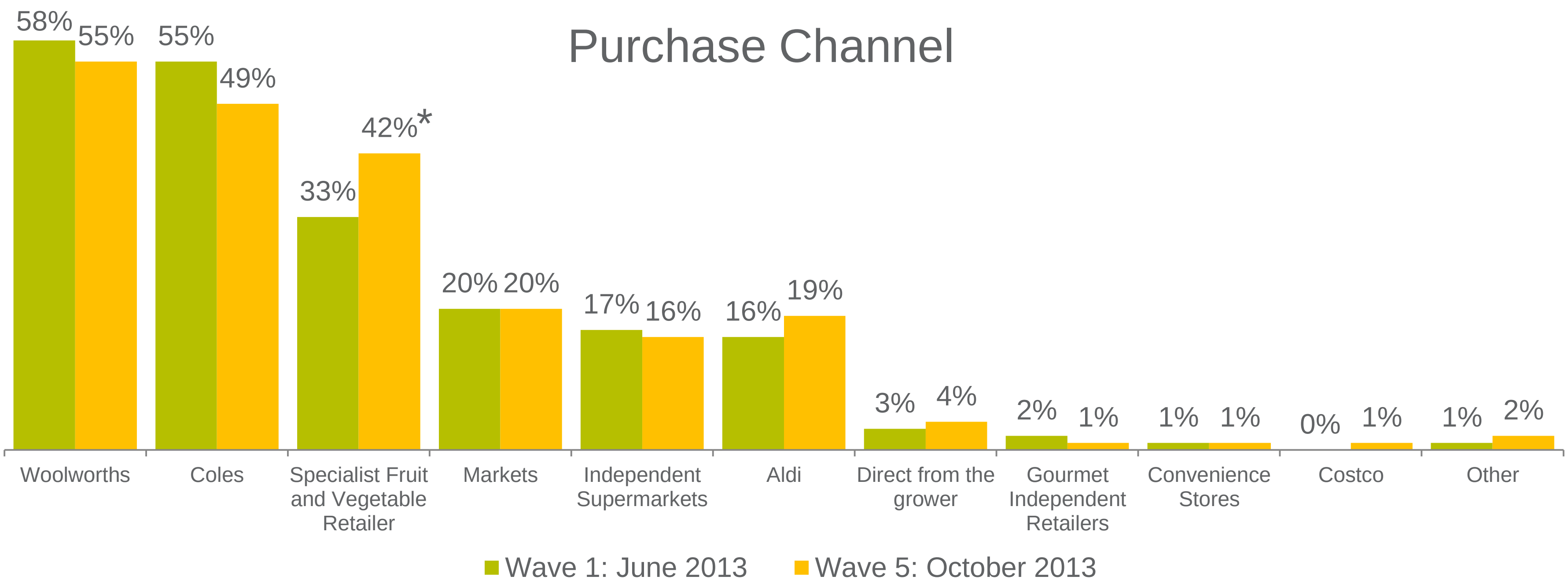
Purchase and Consumption Behaviour

Cauliflower

Average Purchase **3.2** times per month

Average Consumption **8.5** times per month

- Consumption of cauliflower was significantly higher than in June 2013.
- The main purchase channels were Woolworths and Coles, but there was a significant increase in purchase from specialist fruit and vegetable retailers.



Q1. On average, how often do you purchase cauliflower?
Q2. On average, how often do you consume cauliflower?
Q5. From which of the following channels do you typically purchase cauliflower?
Wave 1 N=508 Wave 5 N=448
* Indicates significantly higher scores between Waves

Average Spend & Price Sensitivity
Cauliflower

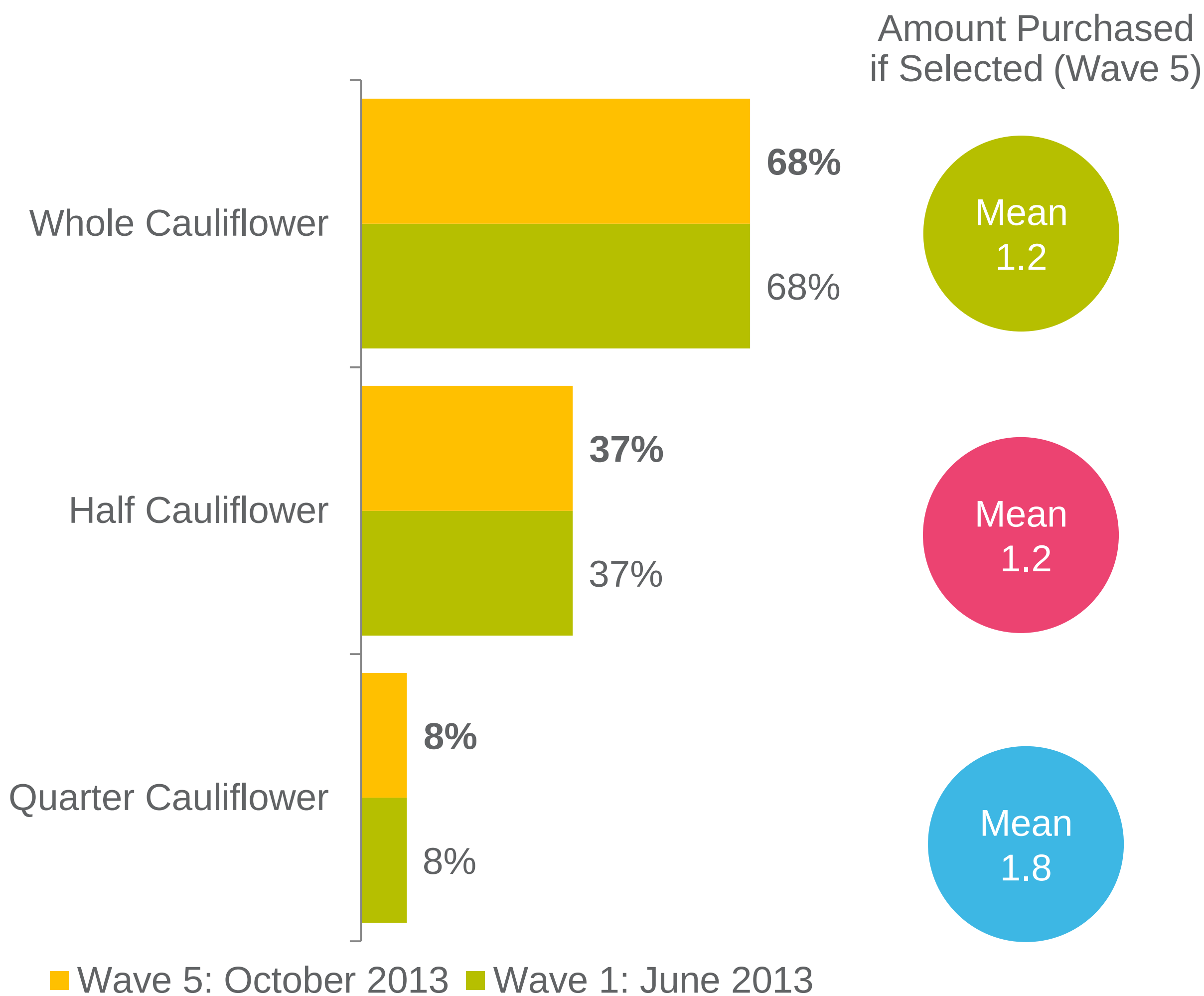
⇛ The average consumer typically purchased **1.0kg** of Cauliflower.

⇛ The average recalled last spend on Cauliflower was **$2.90**

⇛ Consumers perceived the average price for Cauliflower as good value for money **(6.4/10).**

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

Pack Formats Purchased
Cauliflower

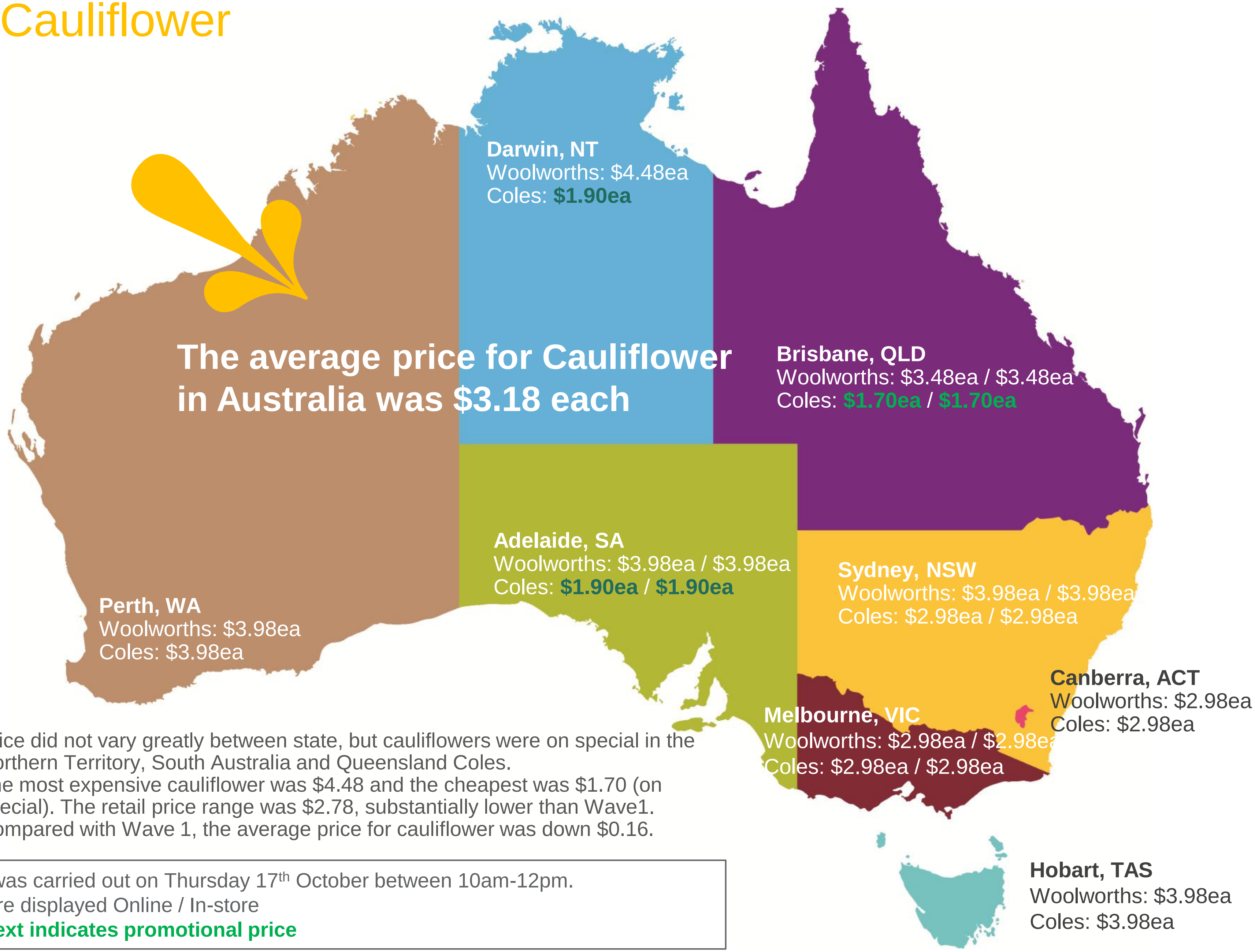


- Whole cauliflowers remained the most common pack format purchased.
- The proportion of formats purchased was in line with Wave 1.
- The average number of each pack format increased slightly from Wave 1 to Wave 5.

Q3a. How much cauliflower does this typically equate to?

Online and In-store Commodity Prices

Cauliflower



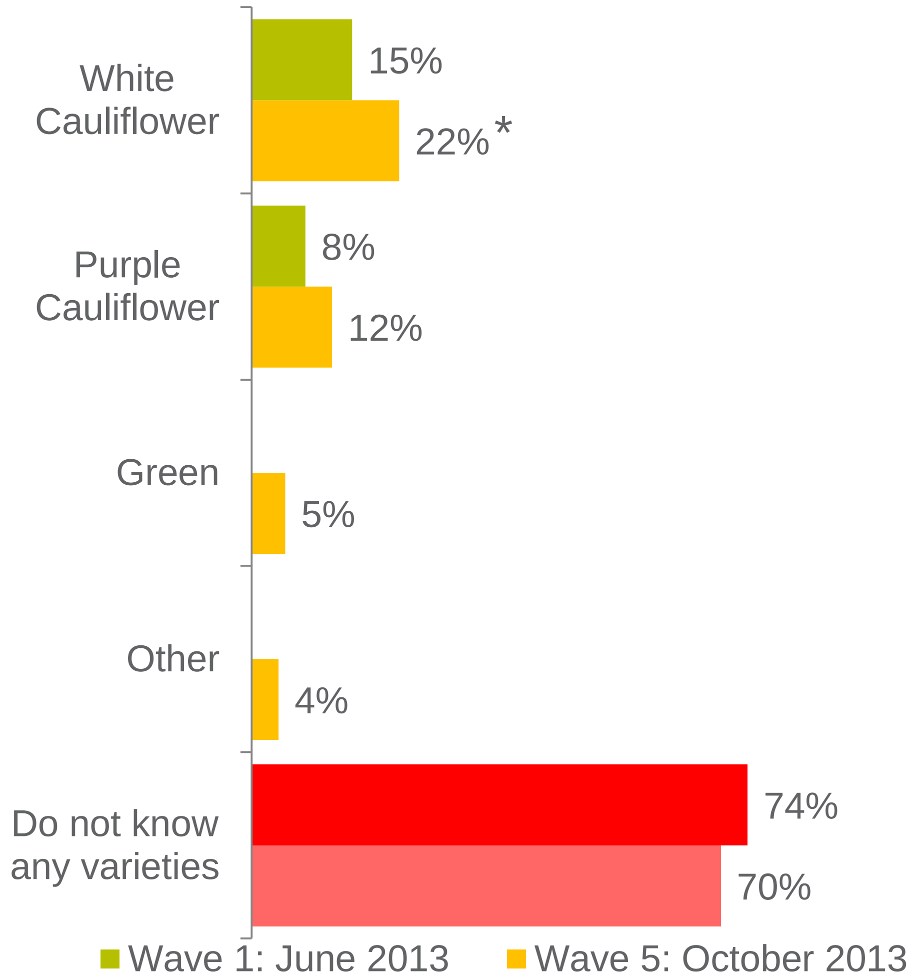
- Price did not vary greatly between state, but cauliflowers were on special in the Northern Territory, South Australia and Queensland Coles.
- The most expensive cauliflower was $4.48 and the cheapest was $1.70 (on special). The retail price range was $2.78, substantially lower than Wave1.
- Compared with Wave 1, the average price for cauliflower was down $0.16.

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

Spontaneous Varietal Awareness & Purchase

Cauliflower

- White cauliflower had significantly higher recall compared with Wave 1.
- Overall, recall/awareness of varieties of cauliflower had increased slightly since Wave 1.
- Cauliflower type was driven by colour colour: white, purple or green.

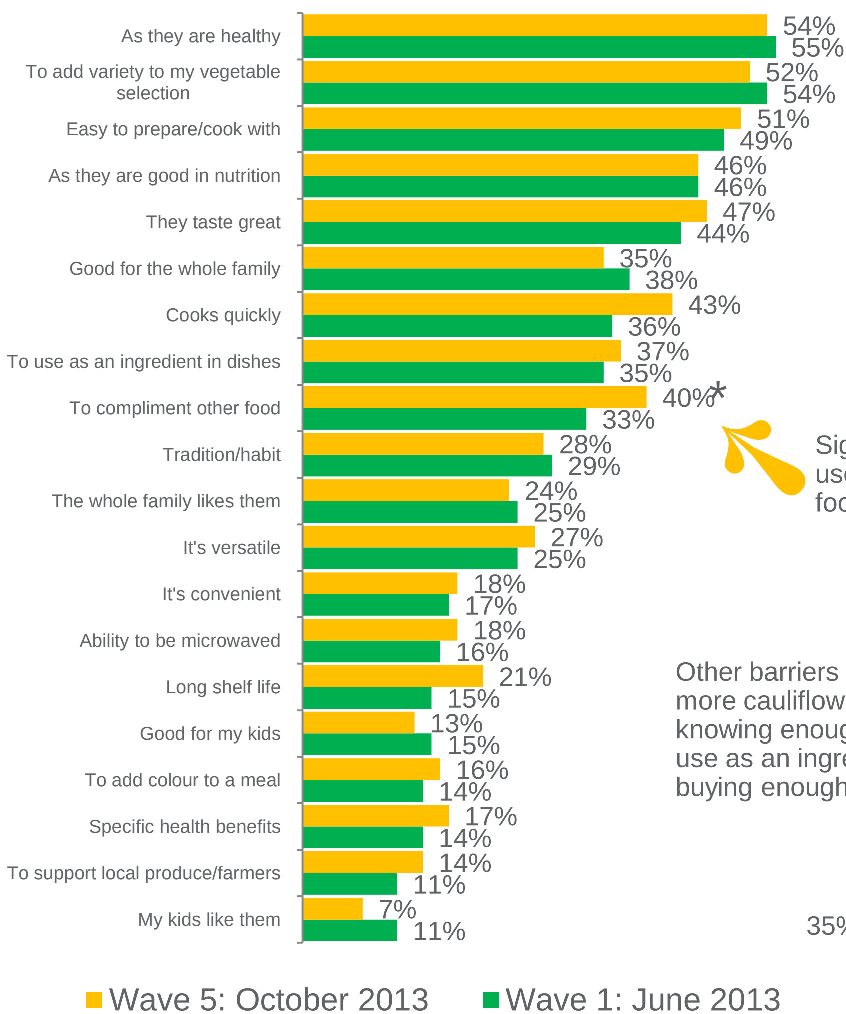


Q6a. What varieties of cauliflower are you aware of? (unprompted)
Wave 1 N=508 Wave 5 N=448
* Indicates significantly higher scores between Waves

Triggers & Barriers to Purchase

Cauliflower

Triggers

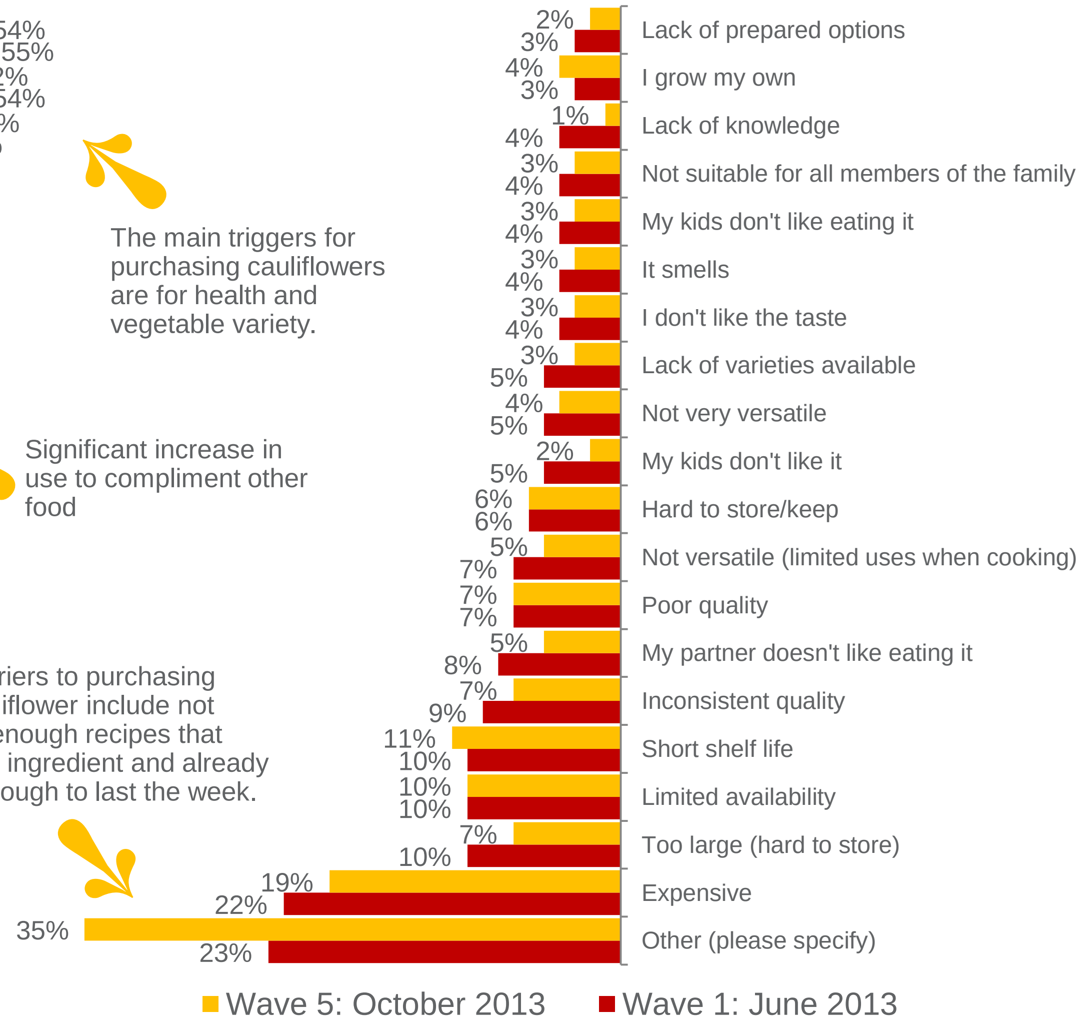


The main triggers for purchasing cauliflowers are for health and vegetable variety.

Significant increase in use to compliment other food

Other barriers to purchasing more cauliflower include not knowing enough recipes that use as an ingredient and already buying enough to last the week.

Barriers

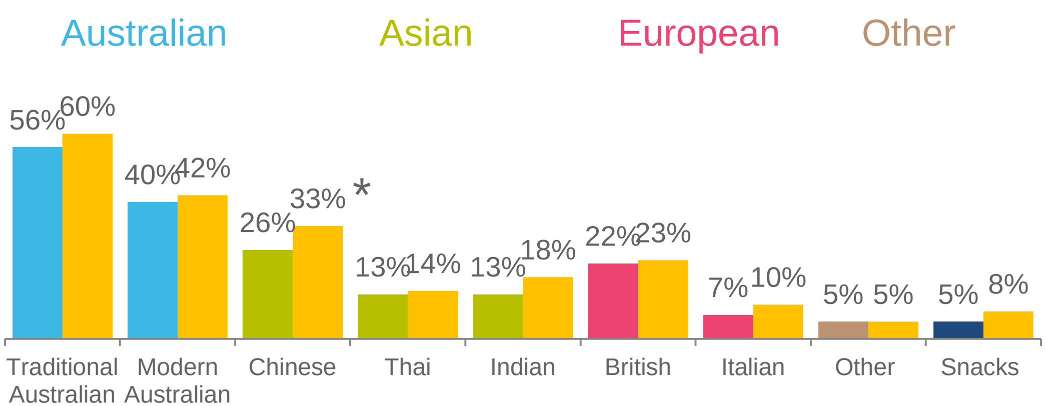


Q7. Which of the following reasons best describes why you purchase cauliflower?
Q8. Which reason best describes why you don't buy cauliflower more often?
Wave 1 N=508 Wave 5 N=448
* Indicates significantly higher scores between Waves

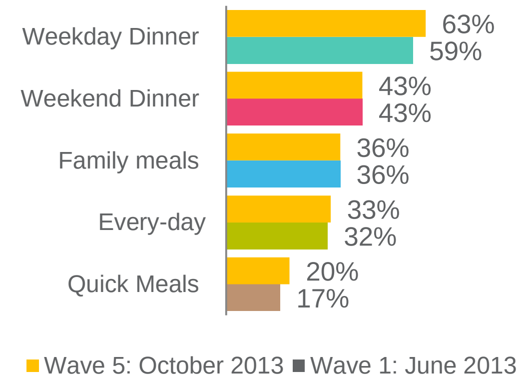
Cooking Preferences & Occasions: Cauliflower

- Compared with Wave 1, consumers were cooking Chinese cuisine significantly more often.
- Cauliflower cooking and occasions were on trend with Wave 1.
- Cauliflower is most often used in Australian cuisine and this wave saw an increase in cauliflower being served with potatoes.

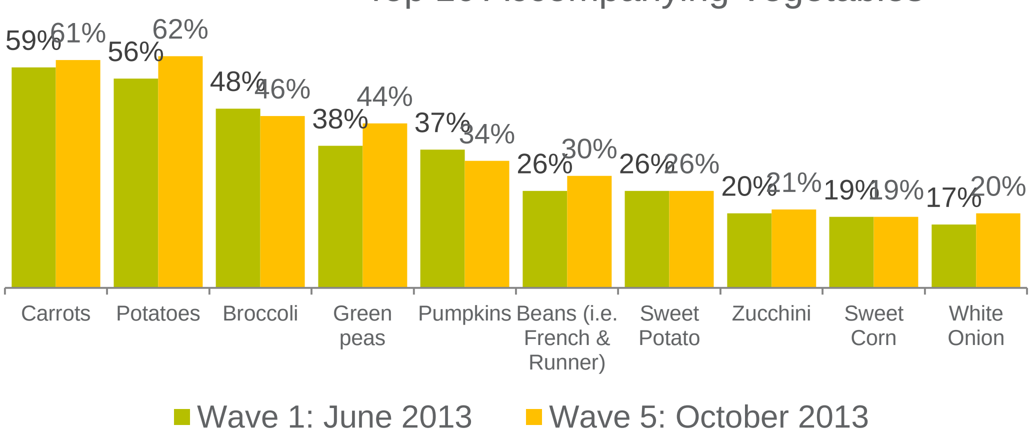
Typical Cuisine Cooked



Top 5 Consumption Occasions



Top 10 Accompanying Vegetables



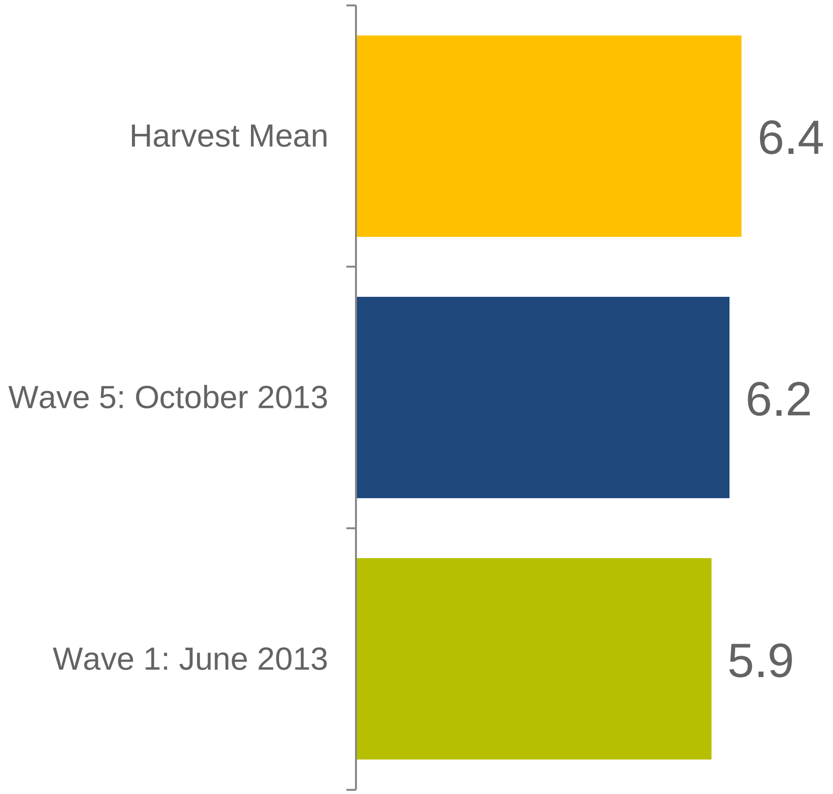
Top 10 Cooking Styles

	Wave 1	Wave 5
Steaming	56%	55%
Boiling	41%	43%
Stir frying	31%	36%
Soup	25%	21%
Microwave	24%	28%
Baking	14%	17%
Stewing	11%	10%
Roasting	10%	7%
Raw	9%	10%
Blanche	6%	6%

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

Importance of Provenance
Cauliflower

⇛ The importance of Cauliflower provenance had increased in importance, but this is still below Harvest commodity mean.

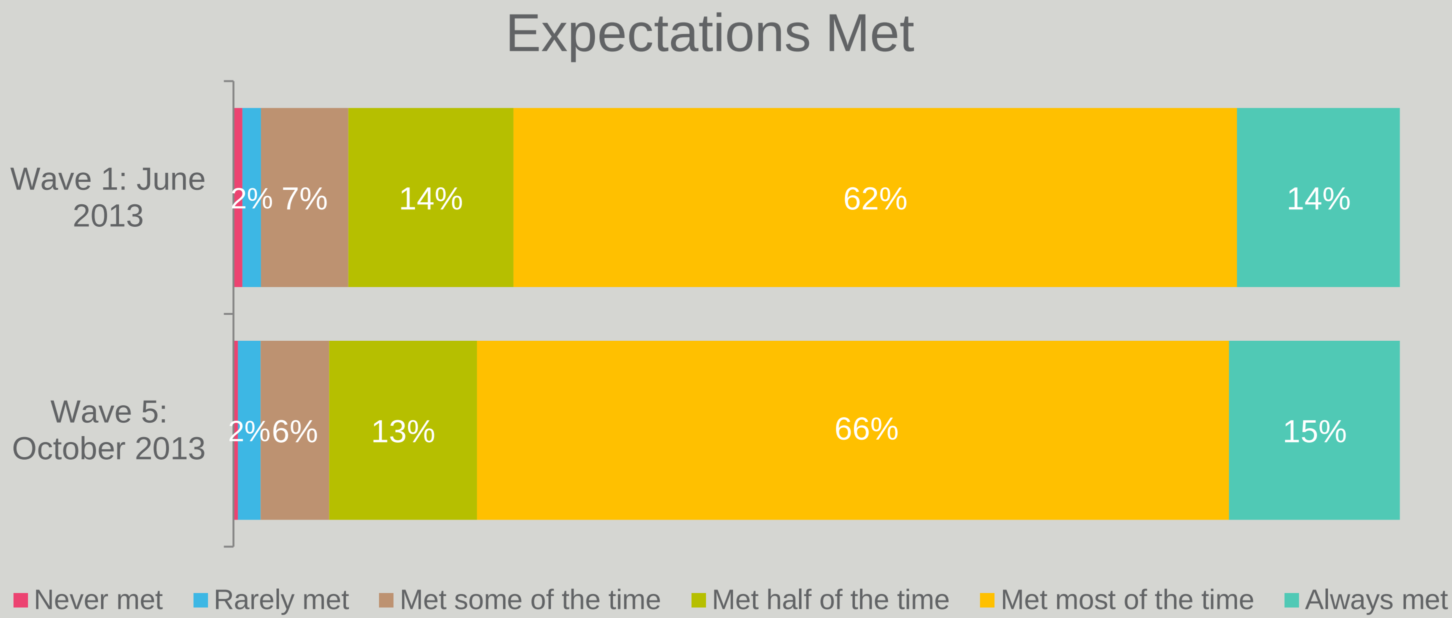


Q14. When purchasing <commodity>, how important is Provenance to you?
Wave 1 N=508 Wave 5 N=448

Freshness and Longevity: Cauliflower

Expected to stay fresh for **9** days

- Over 80% of respondents were happy that their freshness expectation were being met most or all of the time.
- Respondents expected cauliflower to stay fresh for 9 days, which was consistent with Wave 1.



Q12. How long do you expect cauliflower to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy cauliflower?
Wave 1 N=508 Wave 5 N=448

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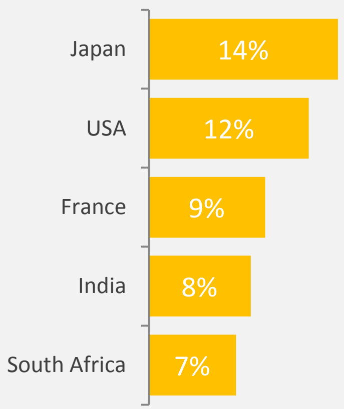
Cauliflower

Cauliflower Global NPDs
August–October 2013

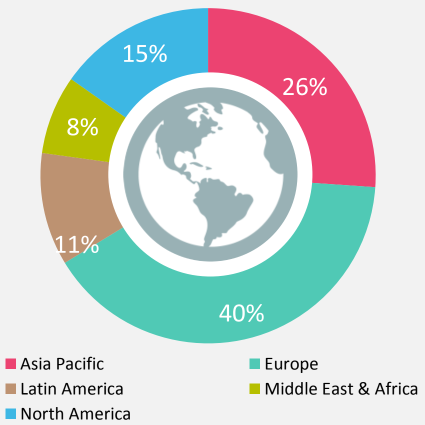
There were 92 new products launched globally over the last 3 months that contained cauliflower as an ingredient. The majority of launches were in Europe.
Launches were mainly in the fruit and vegetable category.
Development centred around microwaveable products and the "no-added" claim.

Country

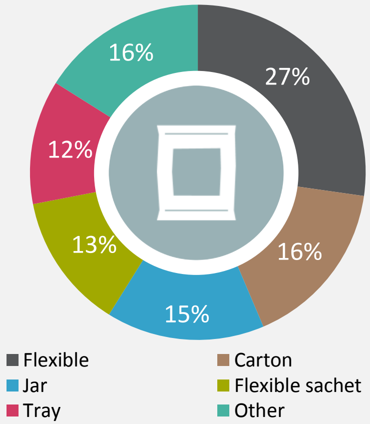


92 Global NPDs

Region



Top Pack Formats



Categories

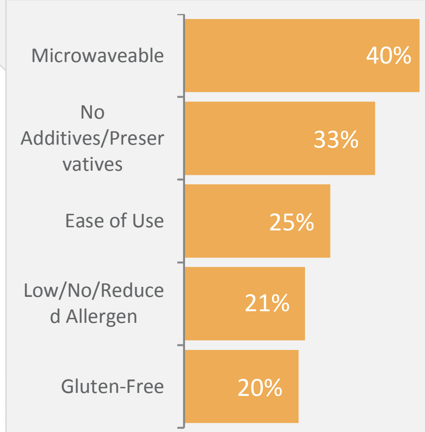
Fruit & Vegetables 25%

Meals 18%

Sauces & Seasonings 13%

Juice Drinks 11%

Top Claims



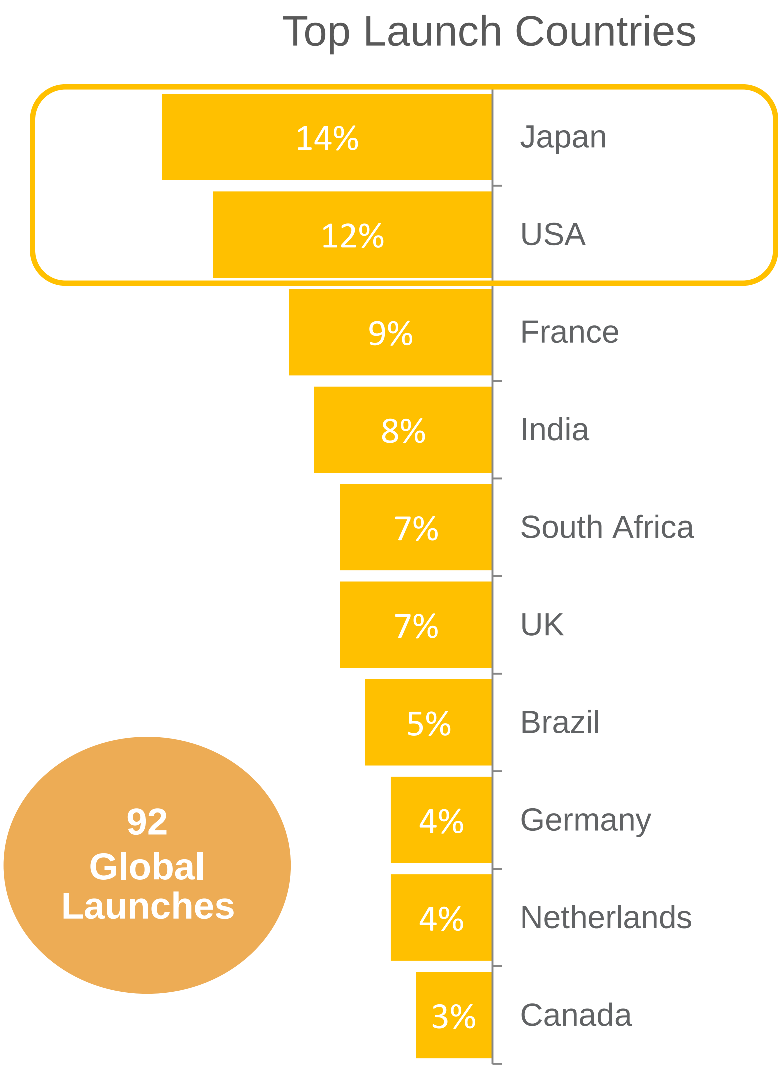
Cauliflower Product Launches:
Last 3 Months (August–October 2013)
Summary

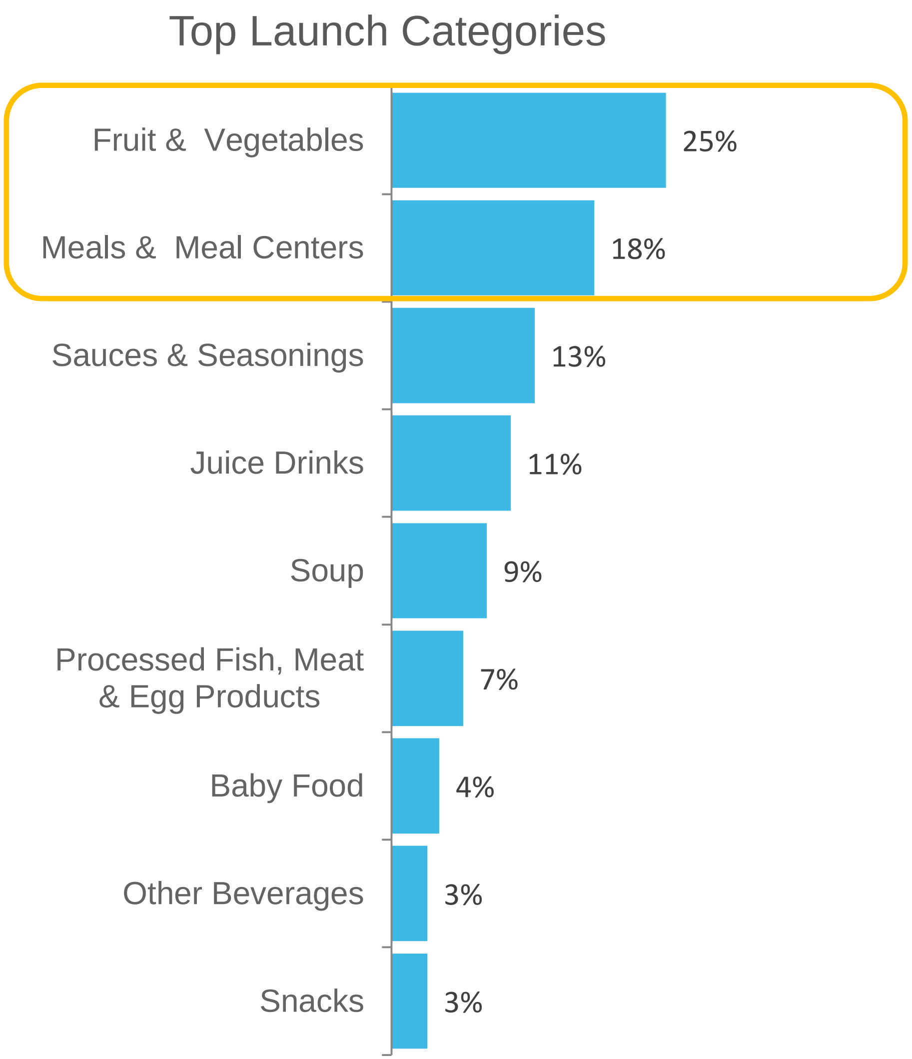
- A total of 92 products containing cauliflower as an ingredient were launched globally in the last 3 months, which was considerably higher compared with launches between April to June (57 launches).
- There was 1 cauliflower product launched in Australia.
- The majority of the products that were launched were in Europe (40%), followed by Asia Pacific (26%). Japan had the most launches containing cauliflower (14%).
- Flexible and carton packaging were the top 2 pack formats used for the products launched (27% and 16% respectively).
- The top categories for launches were fruit and vegetables (25%), meals (18%) and sauces and seasonings (13%).
- Microwaveable and “no-added” claims were highest in the last 3 months, with 40% and 33% respectively.
- There was little innovation in the cauliflower products, common launches were bags of florets and were often packaged with broccoli or potato (examples of these products can be found at the end of the cauliflower trend report).

Source: Mintel (2013)

Cauliflower SKUs
Country, Region & Categories

- The most active countries for cauliflower launches were Japan and the USA.
- The top categories for launches were fruit and vegetables, meals and sauces/seasoning, in keeping with Wave 1.





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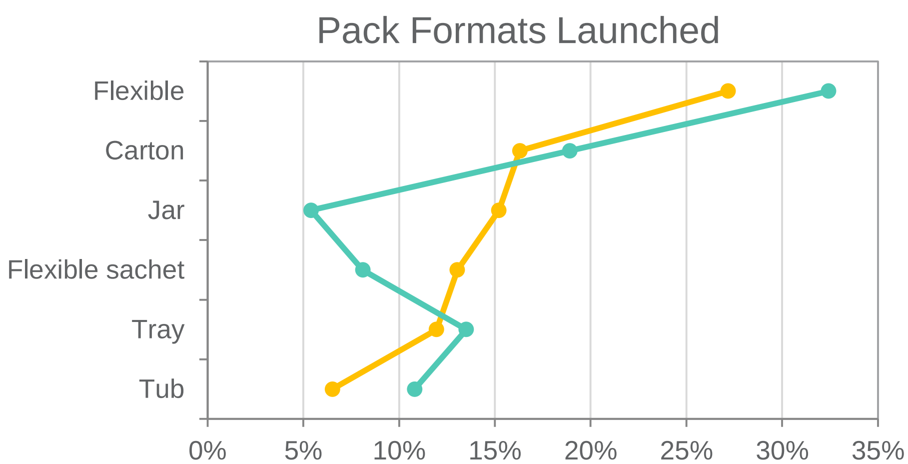
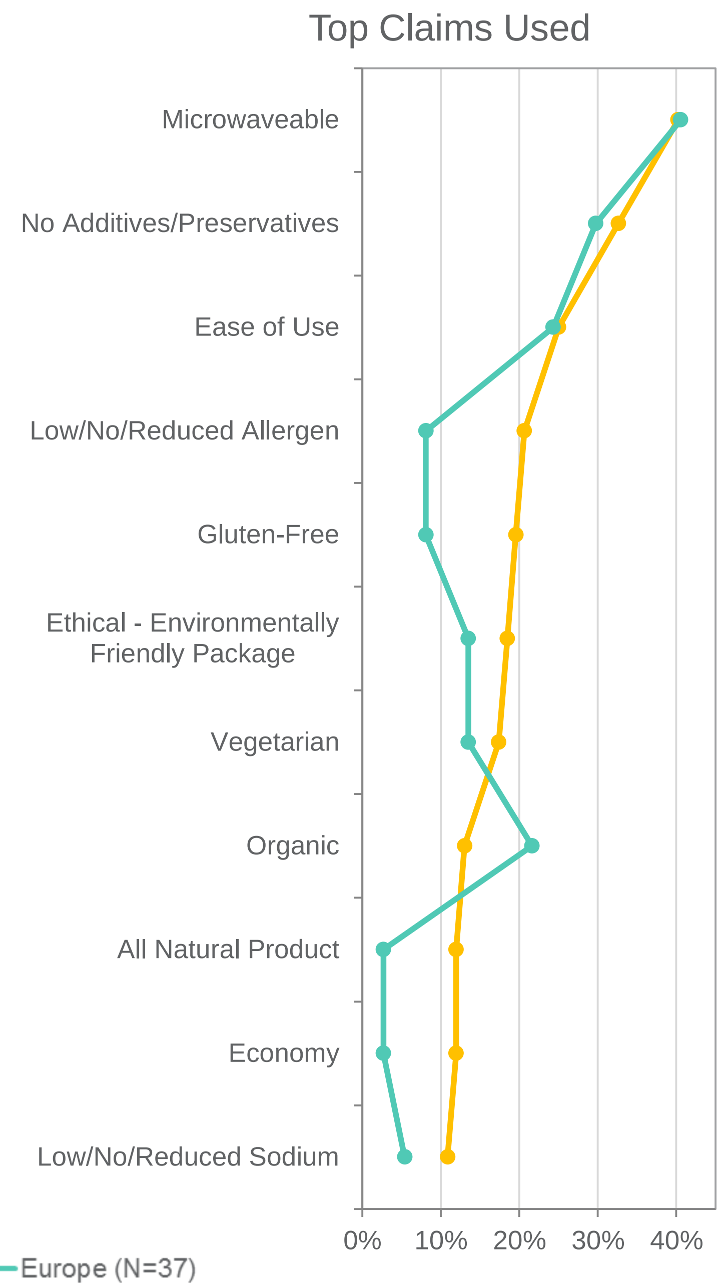
Number of Global Cauliflower NPDs for the L3M N=92

Cauliflower Launches
Top Claims & Pack Formats Used

- Flexible packaging followed by cartons were the top formats used for launches in the last 3 months.
- Microwaveable and “no-added” claims were highest in the last 3 months.
- Organic claims were higher in Europe and overall higher than Wave 1.





Number of Global Cauliflower NPDs for the L3M N=92
Only shown at global level as no regions had more than 30 products launched.

Innovative Cauliflower Launches:
L3M (August–October 2013)

Arctic Gardens Select Floret Duo (Canada)

Arctic Gardens Select Floret Duo consists of broccoli and cauliflower, and is high in vitamin C. The product retails in a 500g steam bag pack that allows to steam cook in a microwave.

Claims:
Microwaveable

Kidfresh Super Duper Chicken Nuggets (USA)

Kidfresh Super Duper Chicken Nuggets are now available. They are made with white meat chicken patties plus pureed vegetables in a whole grain breading, cauliflower, and onions. The humanely raised chicken is packed with goodness, and is said to be an excellent source of protein without antibiotics.

Claims:
No Additives/Preservatives, All Natural Product, Social Media, High Protein, Ethical - Environmentally Friendly Package, Low/No/Reduced Fat, Ethical - Animal, Microwaveable,

Hipp Organic Sweet Potato, Cauliflower & Sweetcorn Bake (UK)

Hipp Organic Sweet Potato, Cauliflower & Sweetcorn Bake comprises mixed vegetables, potatoes and rice cooked with milk. This organic certified product is claimed to be made with the finest organic ingredients picked at the peak of ripeness and steam cooked to give the baby food bursting with goodness and flavour.

Claims:
No Additives/Preservatives, Low/No/Reduced Allergen, Convenient Packaging, GMO-Free, Brain & Nervous System (Functional), Gluten-Free, Microwaveable, Organic.

Michael Angelo's Vegetable Lasagna (USA)

Michael Angelo's Vegetable Lasagna has been repackaged and now also features a new formulation containing Kamut Khorasan wheat pasta. It is made with organic ingredients, and low fat mozzarella and all-natural ricotta cheese.

Claims:
Cobranded, No Additives/Preservatives, Low/No/Reduced Fat, Microwaveable, Organic, Social Media, Premium

Source: Mintel (2013)

Innovative Cauliflower Launches:
L3M (August–October 2013)

Horts Antipasto in Tomato (Venezuela)

Horts Antipasto en Tomate (Antipasto in Tomato) is now available. This 100% natural product retails in a 300g jar.

Claims:
All Natural Product

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),

Knorr Suprême Broccoli Soup with Cauliflower (Switzerland)

Knorr Suprême Broccolisuppe mit Blumenkohl (Broccoli Soup with Cauliflower) has been reformulated and is now available with extra large vegetable pieces of new broccoli and tender cauliflower florets and cream pearls which give it very creamy taste.

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

All Light Gourmet Peach Palm Stroganoff with Broccoli and Cauliflower (Brazil)

All Light Gourmet Estrogonofe de Pupunha com Bouquet de Brócolis e Couve-Flor (Peach Palm Stroganoff with Broccoli and Cauliflower) is free from gluten and ready to eat. The microwaveable product is suitable for vegetarians and retails in a 300g pack.

Claims:
Low/No/Reduced Allergen, Low/No/Reduced Fat, Microwaveable, Ease of Use, Gluten-Free, Vegetarian, Slimming

Source: Mintel (2013)

Innovative Cauliflower Launches:
L3M (August–October 2013)

Nestlé NaturNes Collection Automne-Hiver Cauliflower & Potato Meal (France)

Nestlé NaturNes Collection Automne-Hiver Choux-Fleurs, Pommes de Terre (Cauliflower & Potato Meal) is a limited edition recipe for the Autumn and Winter season. This microwaveable product is made from 100% natural origin ingredients, has a ground texture that is suitable for babies from six months of age, and has been steam cooked.

Claims:
No Additives/Preservatives, All Natural Product, Seasonal, Vitamin/Mineral Fortified, Microwaveable, Low/No/Reduced Sodium, Babies & Toddlers (0-4), Limited Edition

Topvalu 40 Vegetables Juice (Japan)

Topvalu 40 Vegetables Juice has been repackaged in a recyclable 1000ml carton. According to the manufacturer, each 200ml of product is madre from 350g of vegetables. This juice is free from sugar and salt. Launched on August 1, 2013 with a RRP of 198 yen.

Claims:
Low/No/Reduced Sodium, Ethical - Environmentally Friendly Package, Economy, Low/No/Reduced Sugar

Farley's Heinz Dinners Cauliflower & Broccoli Cheese (Heinz)

Farley's Heinz Dinners Cauliflower & Broccoli Cheese comprise vegetables, cereals and cheese meal with milk protein. This meal is suitable for babies aged four months and above, is enriched with one third of the baby's key vitamins and minerals.

Claims:
No Additives/Preservatives, Vitamin/Mineral Fortified, Added Calcium, Other (Functional), Ethical - Environmentally Friendly Package

Nola Piccalilli Vegetable Relish (South Africa)

Nola Piccalilli Vegetable Relish has been repackaged. This halal-certified product now retails in a newly designed 385g pack.

Claims:
Halal

Source: Mintel (2013)

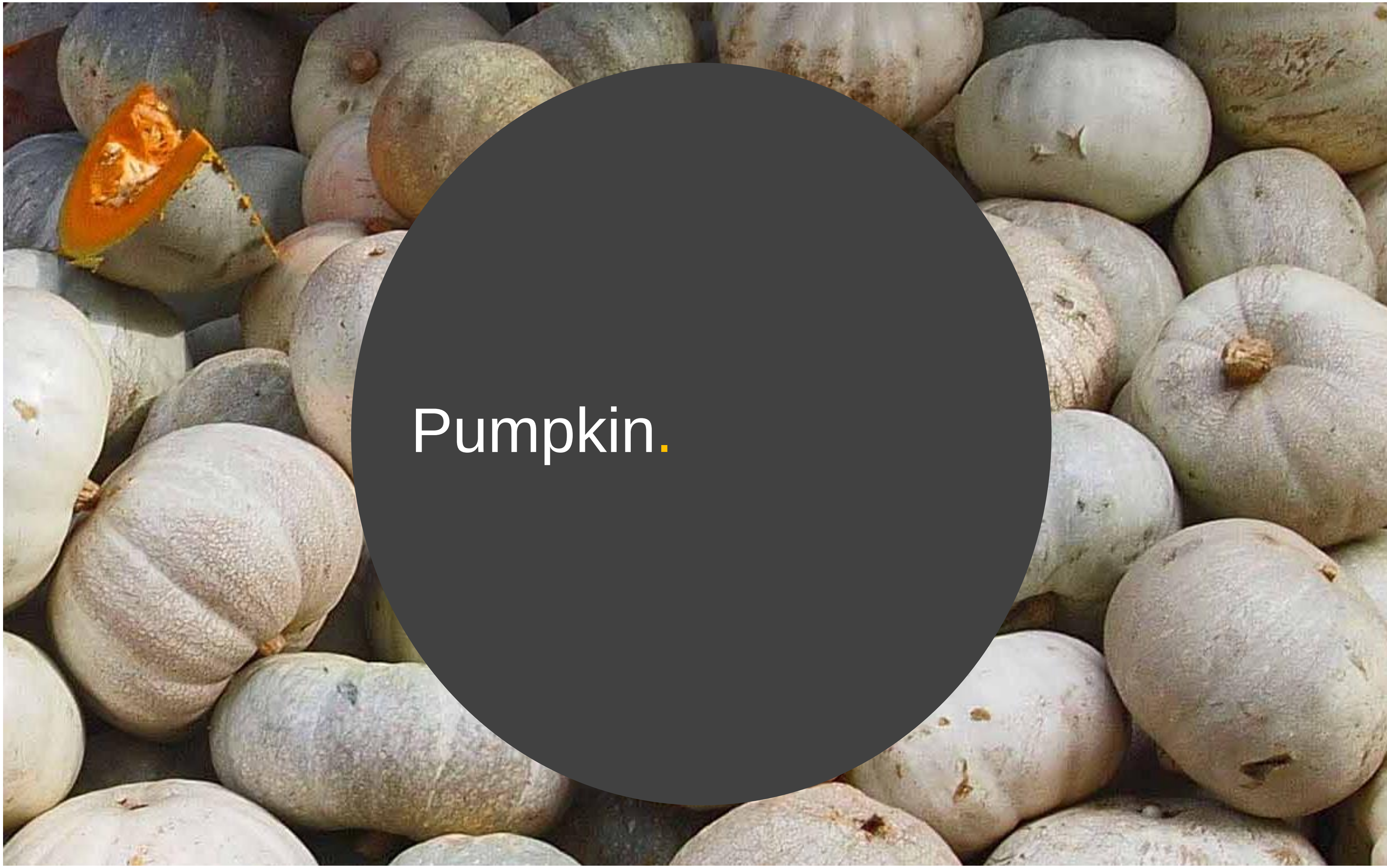
Australian Cauliflower Launch:
L3M (August-October 2013)

Simplee Soup in a Cup Minestrone Soup with Noodles

Simplee Soup in a Cup Minestrone Soup with Noodles contains no added MSG, artificial colours, flavours or preservatives. It is also a good source of fibre and requires only water to prepare. This 99% fat-free product is suitable for vegetarians and said to be a satisfying snack anytime of the day. It retails in a 117g pack with three 39g sachets.

Claims:
No Additives/Preservatives, High/Added Fiber, Low/No/Reduced Fat, Time/Speed, Ease of Use, Vegetarian

Source: Mintel (2013)



Pumpkin.

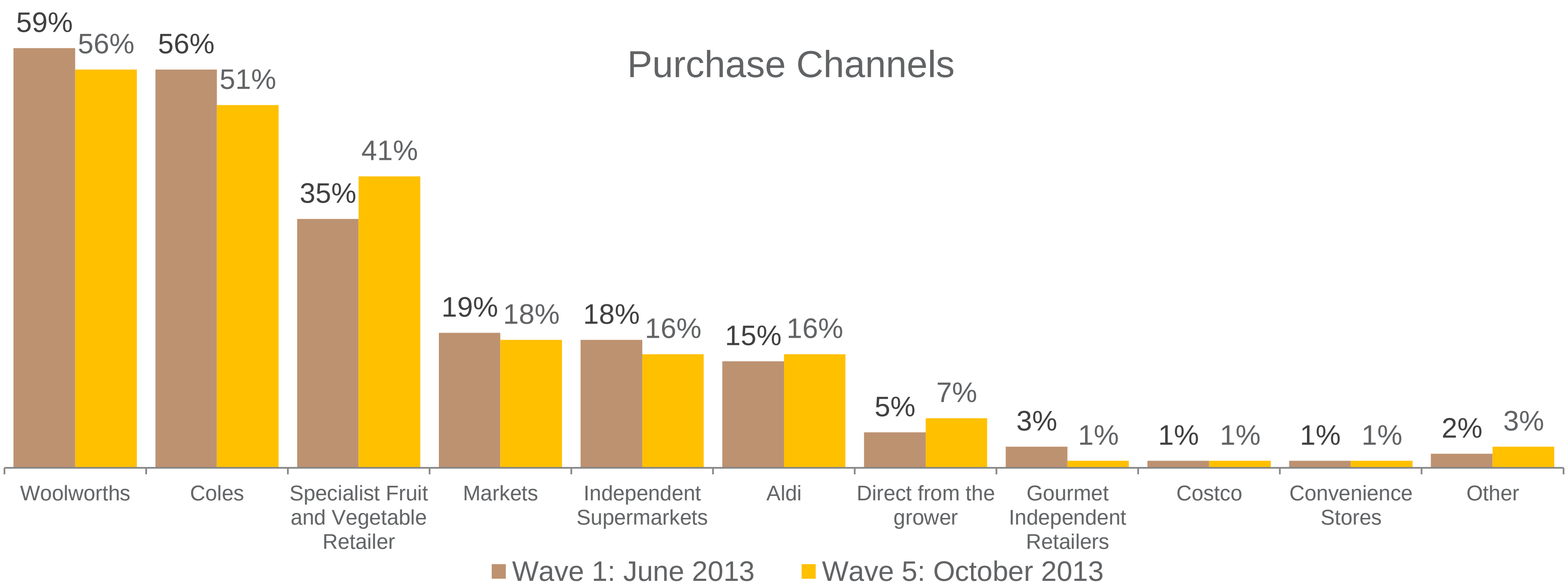
Purchase and Consumption Behaviour

Pumpkin

Average Purchase **3.1** times per month

Average Consumption **9.1** times per month

- Consumption of pumpkin had increased since Wave 1.
- The main purchase channels were key retailers, Woolworths and Coles. There was an increase in purchase from specialist retailers.



Q1. On average, how often do you purchase pumpkin?
Q2. On average, how often do you consume pumpkin?
Q5. From which of the following channels do you typically purchase pumpkin?
Wave 1 N=513 Wave 5 N=391

Average Spend & Price Sensitivity
Pumpkin

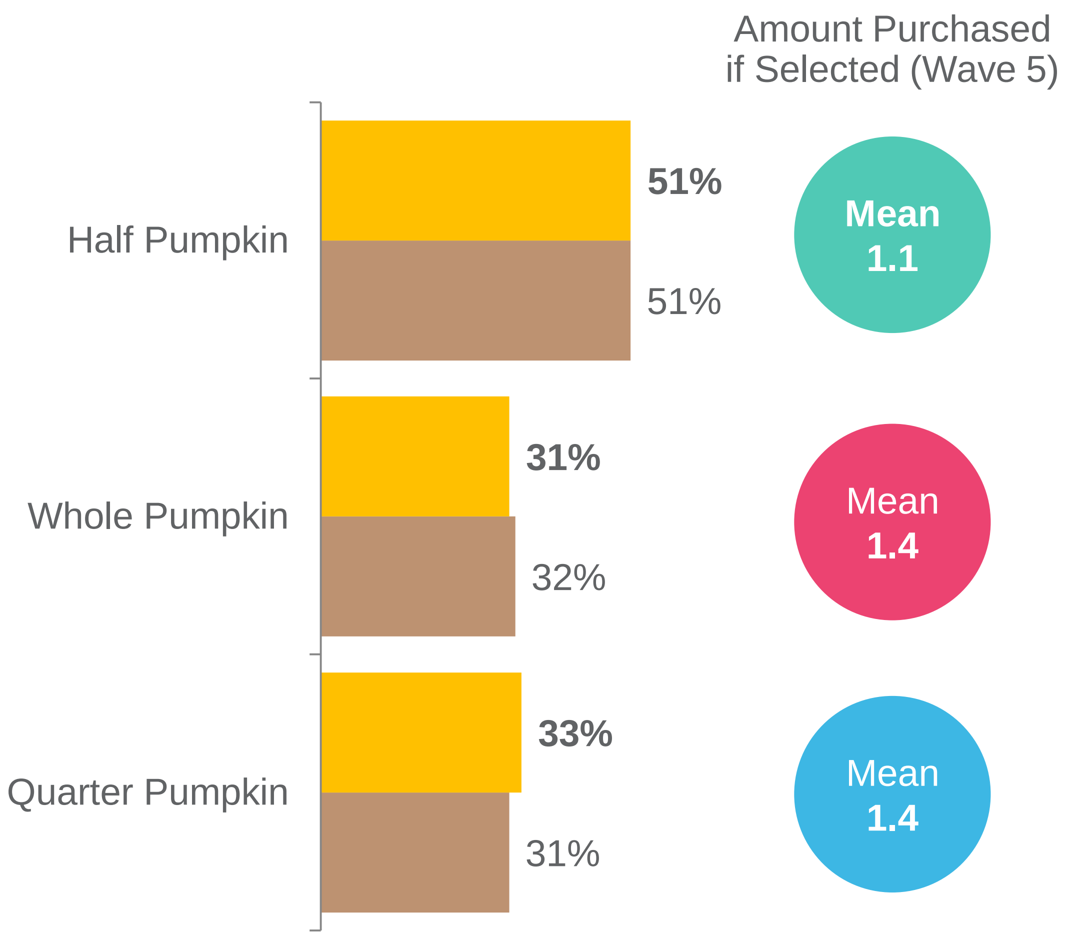
⇛ The average consumer typically purchased **1.5kg** of Pumpkin, on par with Wave 1.

⇛ The average recalled last spend was **$3.30.**

⇛ On average, consumers perceived Pumpkin to be good value **(6.7/10).**

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

Pack Formats Purchased
Pumpkin

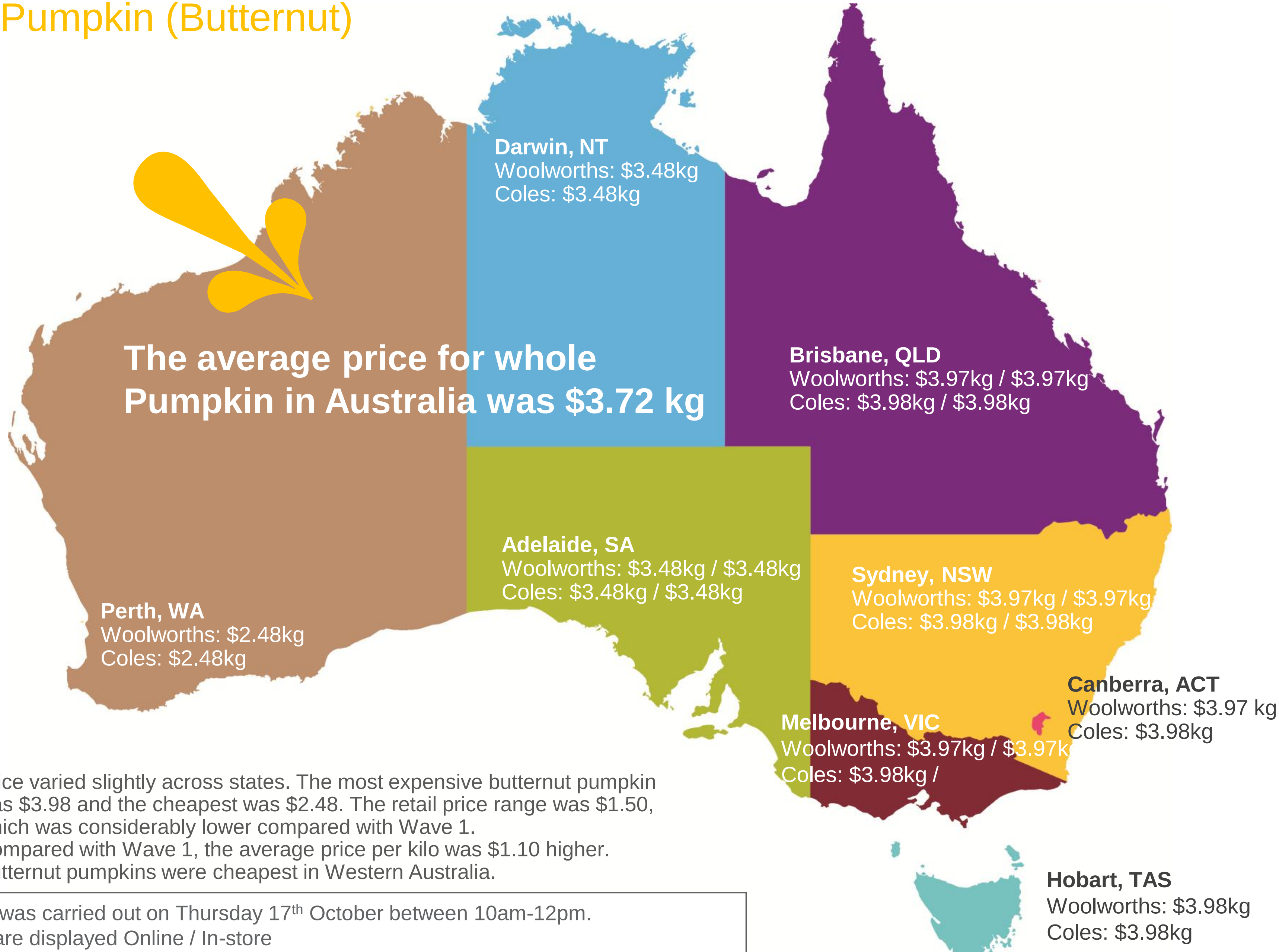


- Formats purchased were on trend with Wave 1, with half pumpkins purchased most frequently.
- The average amount purchased were similarly on trend with Wave 1 purchase habits.

Q3a. How much pumpkin does this typically equate to?

Online and In-store Commodity Prices

Pumpkin (Butternut)

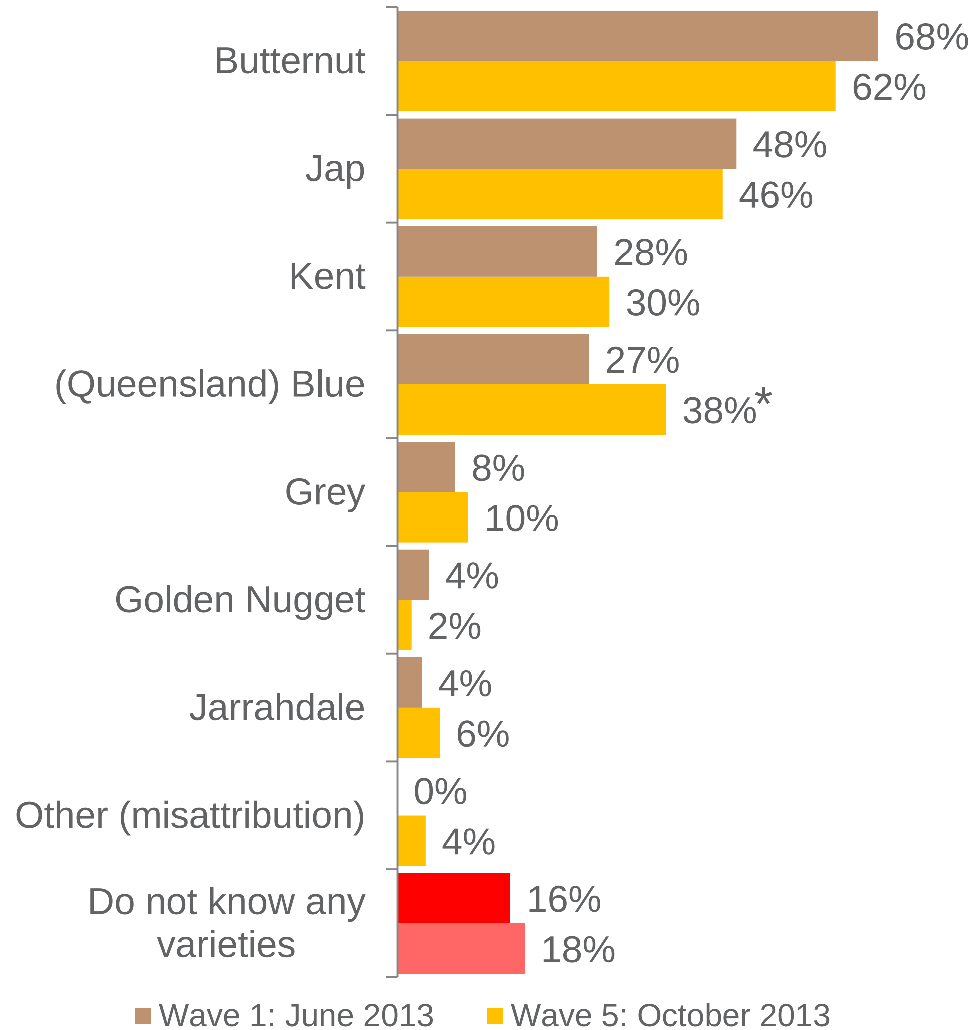


- Price varied slightly across states. The most expensive butternut pumpkin was $3.98 and the cheapest was $2.48. The retail price range was $1.50, which was considerably lower compared with Wave 1.
- Compared with Wave 1, the average price per kilo was $1.10 higher.
- Butternut pumpkins were cheapest in Western Australia.

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

Spontaneous Awareness & Purchase
Pumpkin

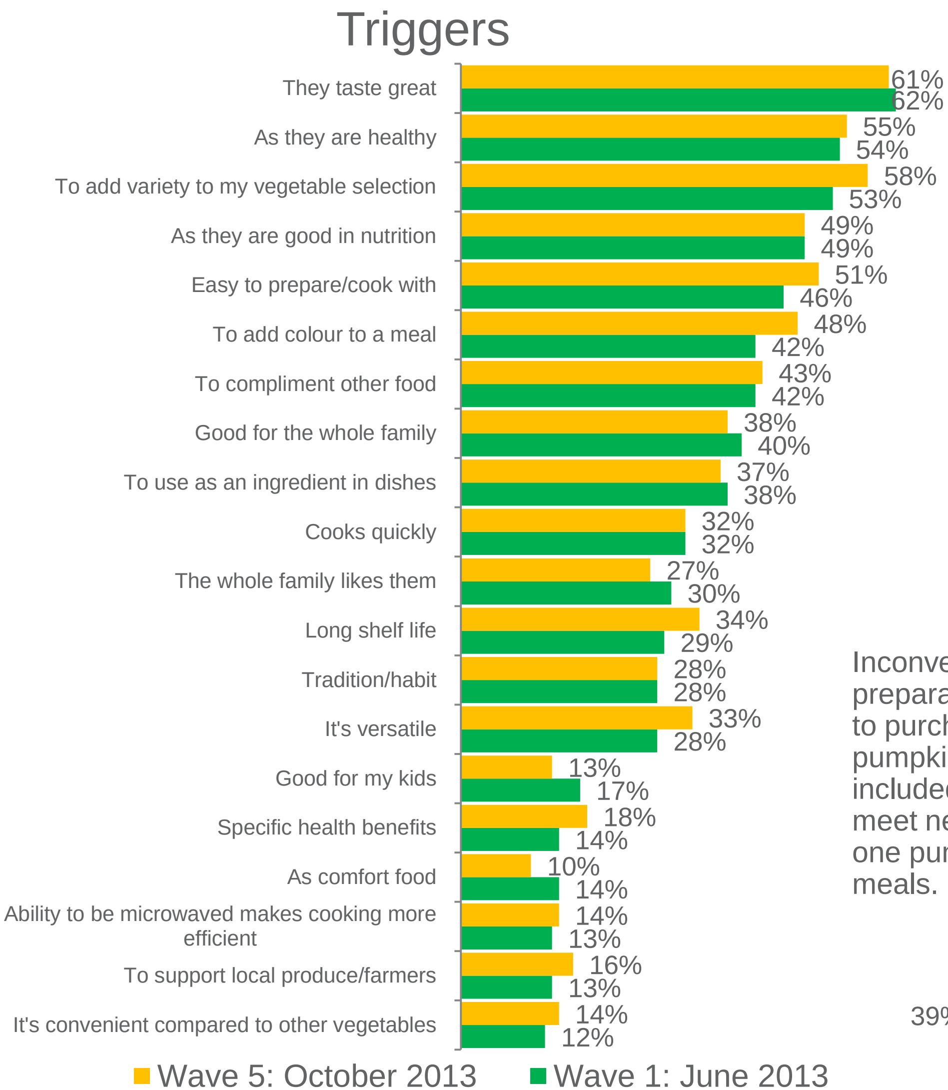
- There was a significant increase in awareness of Queensland Blue pumpkin compared with Wave 1.
- Butternut & Jap pumpkin still had the highest levels of awareness.
- Overall, levels of awareness were on trend with Wave 1.



Q6a. What varieties of pumpkin are you aware of? (unprompted)
Wave 1 N=513 Wave 5 N=391
* Indicates significant difference between waves.

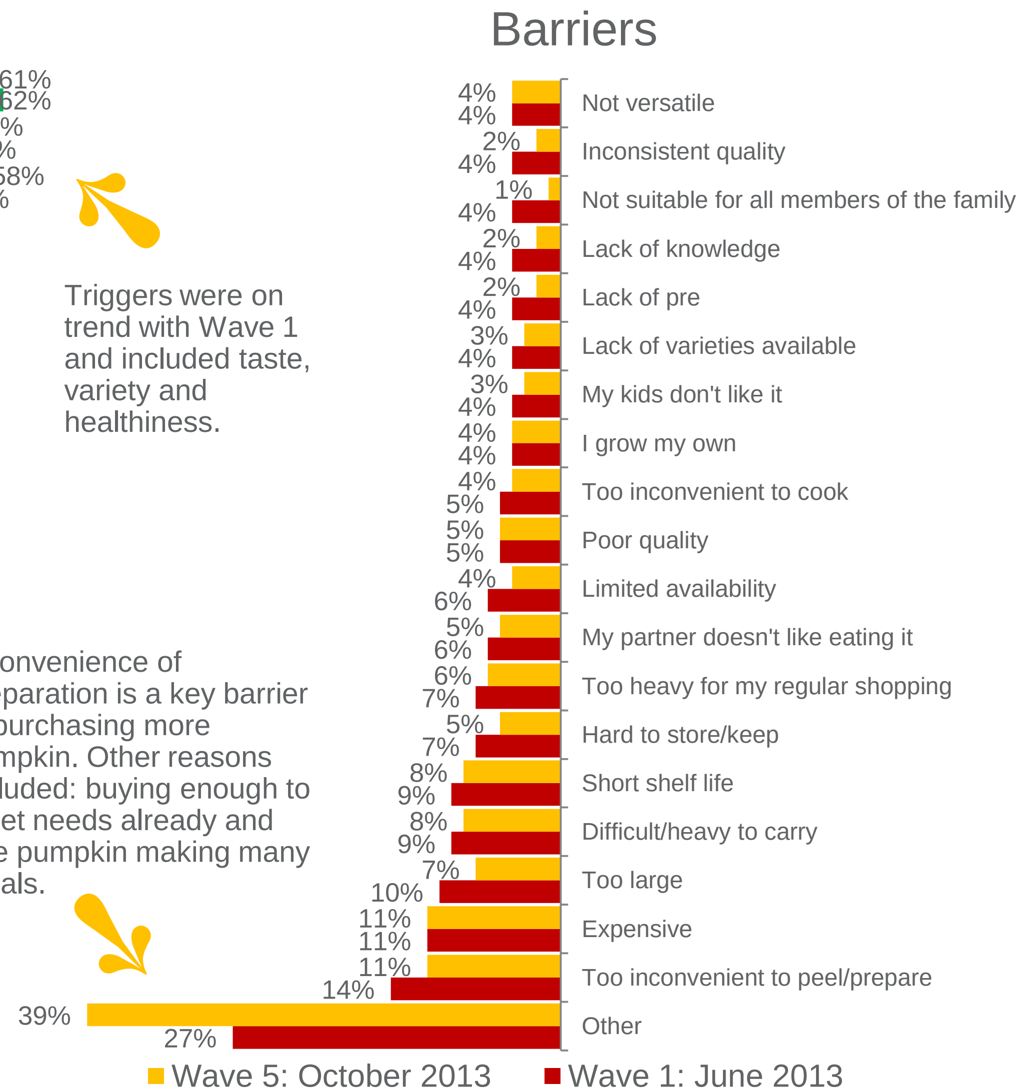
Triggers & Barriers to Purchase

Pumpkin



Triggers were on trend with Wave 1 and included taste, variety and healthiness.

Inconvenience of preparation is a key barrier to purchasing more pumpkin. Other reasons included: buying enough to meet needs already and one pumpkin making many meals.



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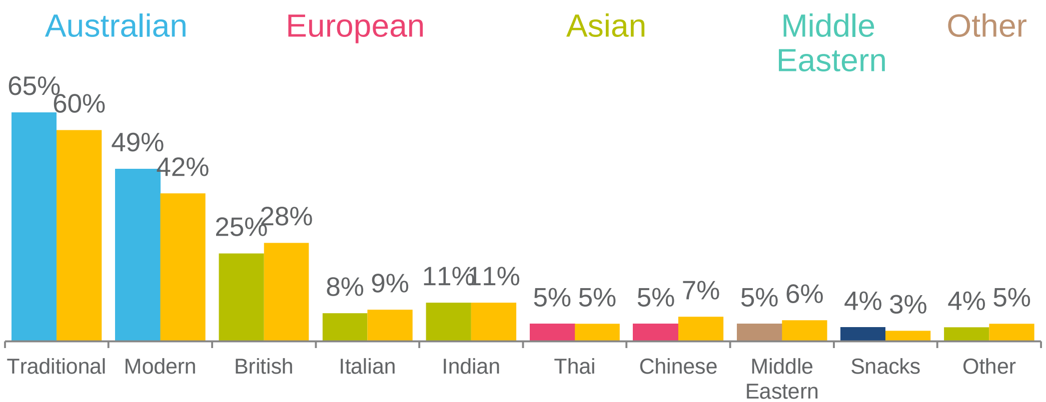
Q7. Which of the following reasons best describes why you purchase pumpkin?
Q8. Which reason best describes why you don't buy pumpkin more often?
Wave 1 N=513 Wave 5 N=391

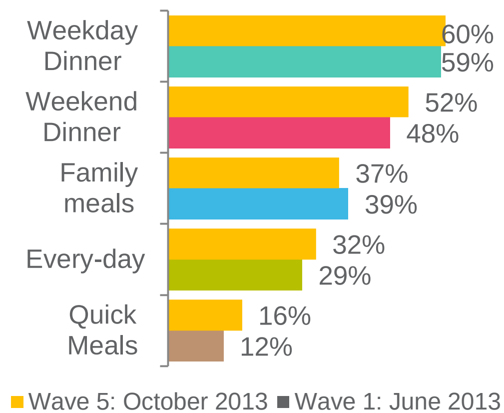
Cooking Preferences & Occasions: Pumpkin

- Pumpkin was significantly more likely to be served with cauliflower compared with Wave 1.
- There was a slight decrease in pumpkin being used in Australian cuisine, with an increase in European cuisine.
- Pumpkin was most often served with potatoes and carrots, Wave 5 saw also saw an increase in accompanying with cauliflower.

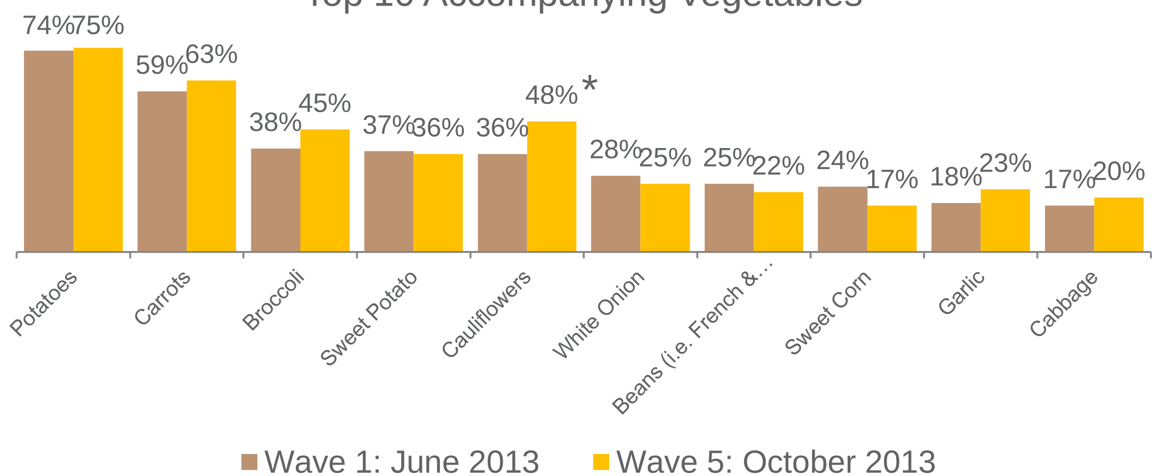
Typical Cuisine Cooked



Top 5 Consumption Occasions



Top 10 Accompanying Vegetables



Top 10 Cooking Styles		
	Wave 1	Wave 5
Roasting	65%	64%
Soup	45%	49%
Baking	43%	47%
Mashing	42%	46%
Boiling	40%	39%
Steaming	35%	39%
Microwave	19%	20%
Stewing	14%	16%
Puree	11%	12%
Stir frying	10%	10%

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

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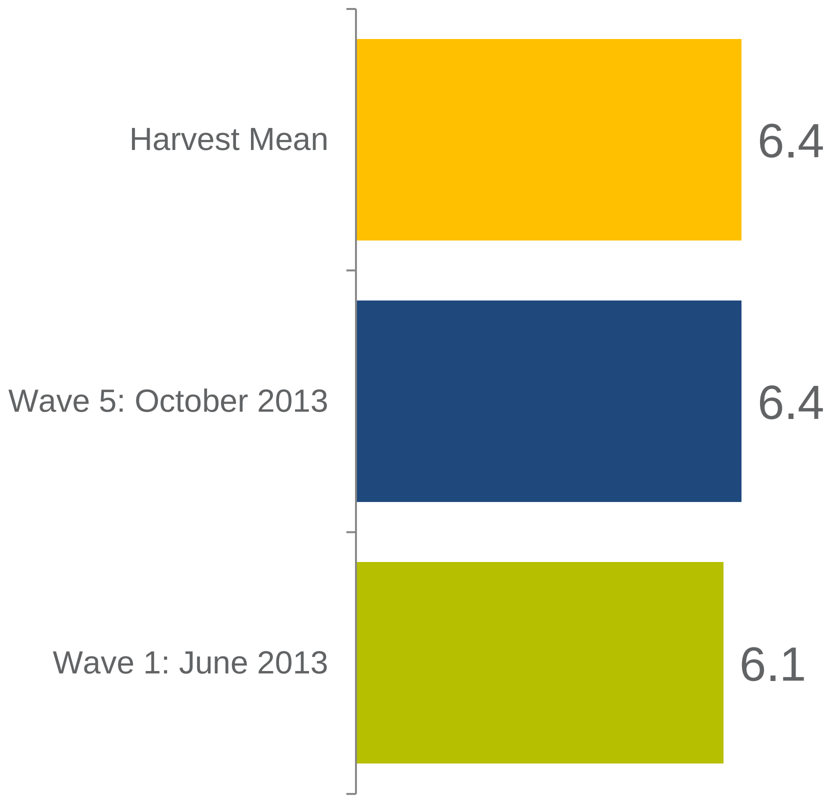
Importance of Provenance: Pumpkin

- Provenance had increased slightly since Wave 1, but is on trend with the Harvest commodity mean.

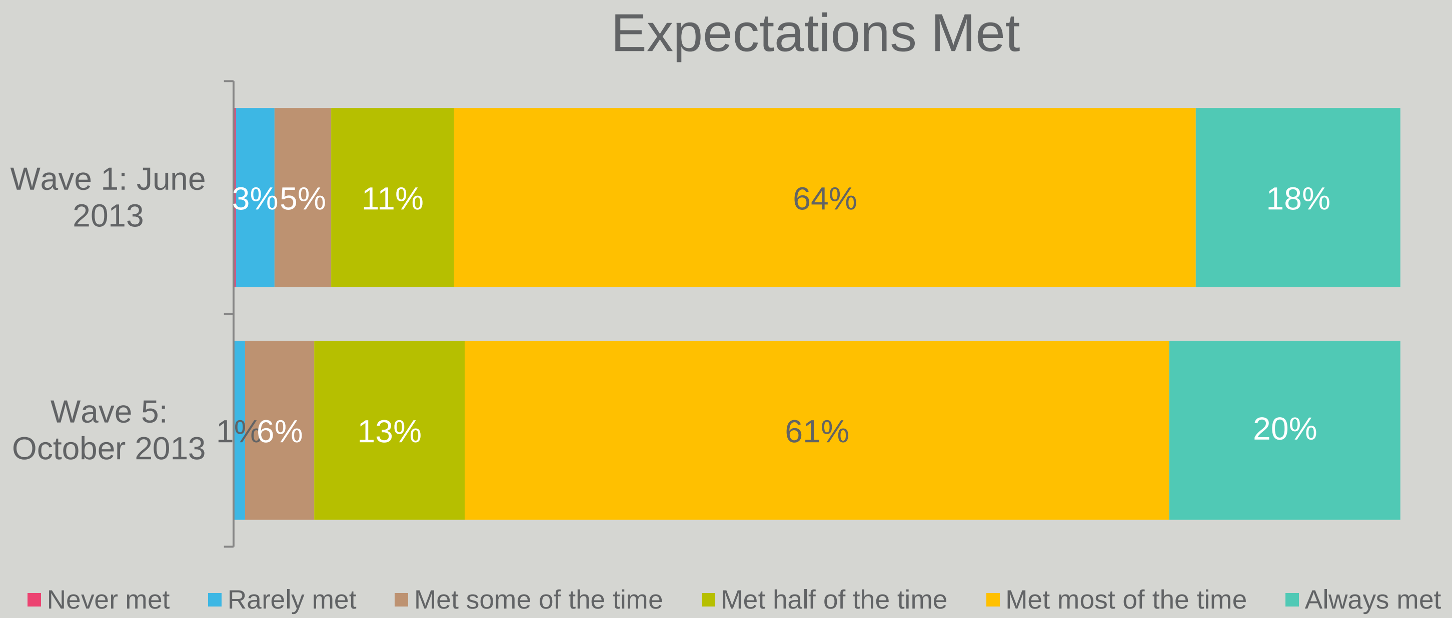


Q14. When purchasing <commodity>, how important is Provenance to you?
Wave 1 N=513 Wave 5 N=391

Freshness and Longevity: Pumpkin

Expected to stay fresh for **13** days

- Respondents expected pumpkins to stay fresh for 13 days, which is longer than in Wave 1.
- Satisfaction levels were on par with Wave 1. Four in five respondents were satisfied that their expectations were met most or all of the time, which was the same as in Wave 1.



Q12. How long do you expect pumpkin to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy pumpkin?
Wave 1 N=513 Wave 5 N=391

Pumpkin Trends

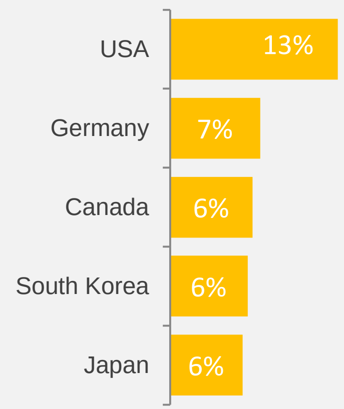
Pumpkin Global NPDs

August–October 2013

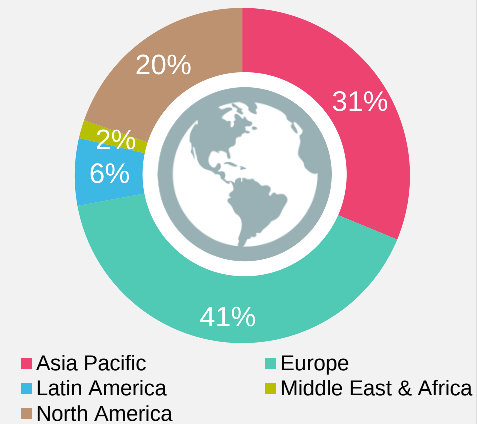
There were 509 new products launched over the last 3 months. The majority of these occurred in Europe and Asia Pacific. The top categories containing pumpkin launched in the past 3 months were snacks, bakery products and breakfast cereals.

509 Global NPDs

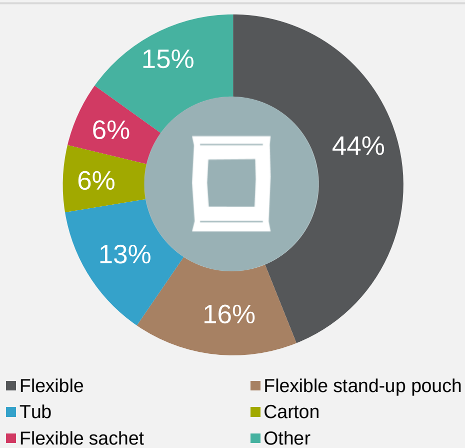
Country



Region



Top Pack Formats



Categories

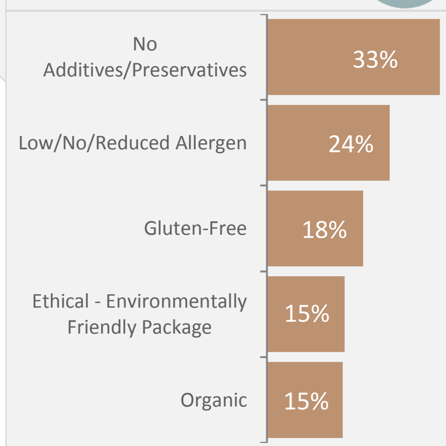
Snacks 21%

Bakery 13%

Breakfast Cereals 12%

Baby Food 6%

Top Claims



Pumpkin Product Launches:
Last 3 Months August–October 2013
Summary

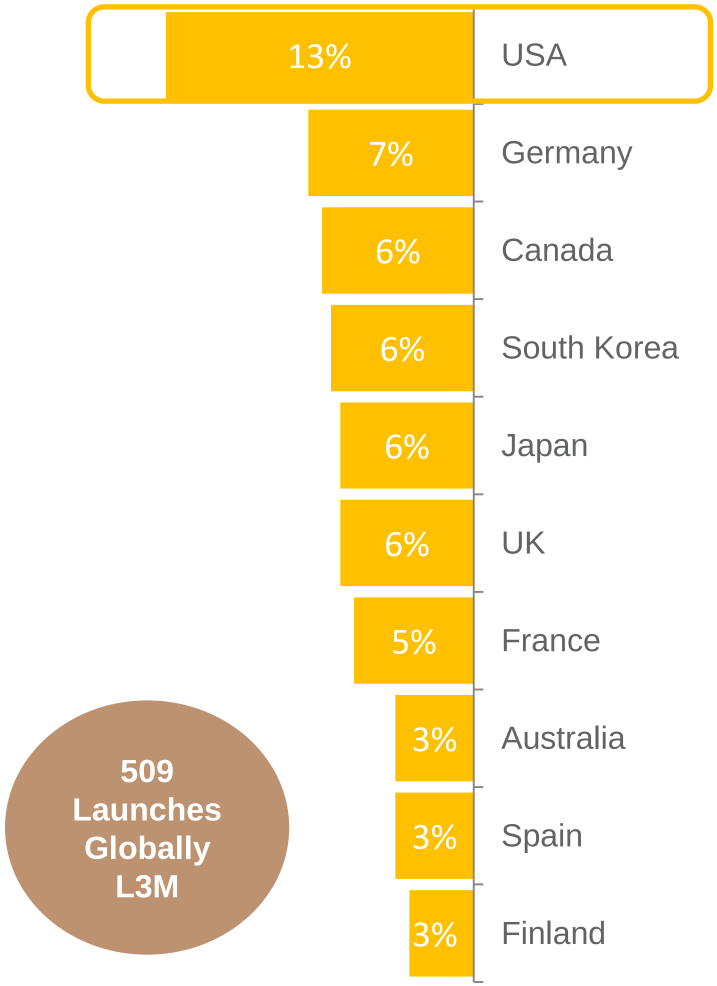
- A total of 509 products containing pumpkin as an ingredient were launched globally in the last 3 months, a substantial increase in launches since Wave 1.
- There were 17 pumpkin launches in Australia compared with 10 launches in April to June 2013.
- Europe and the Asia Pacific were the top 2 regions where these products were launched (41% and 31% respectively).
- Flexible packaging was the dominant pack format used for these launches (44%). Flexible stand-up pouches accounted for 16% of launches.
- Top categories for product launches were snacks (21%), bakery goods (13%) and breakfast cereals (12%).
- Core claims for products launches globally were based around health (e.g. no additives/preservatives 33%, low allergen 24%, gluten-free 18% and organic 15%).
- The most innovative launches found were; pumpkin and fruit yoghurt bites, pumpkin seed and basil oil and pumpkin spiced latte beverage (examples of these products can be found at the end of the pumpkin trend report).

Source: Mintel (2013)

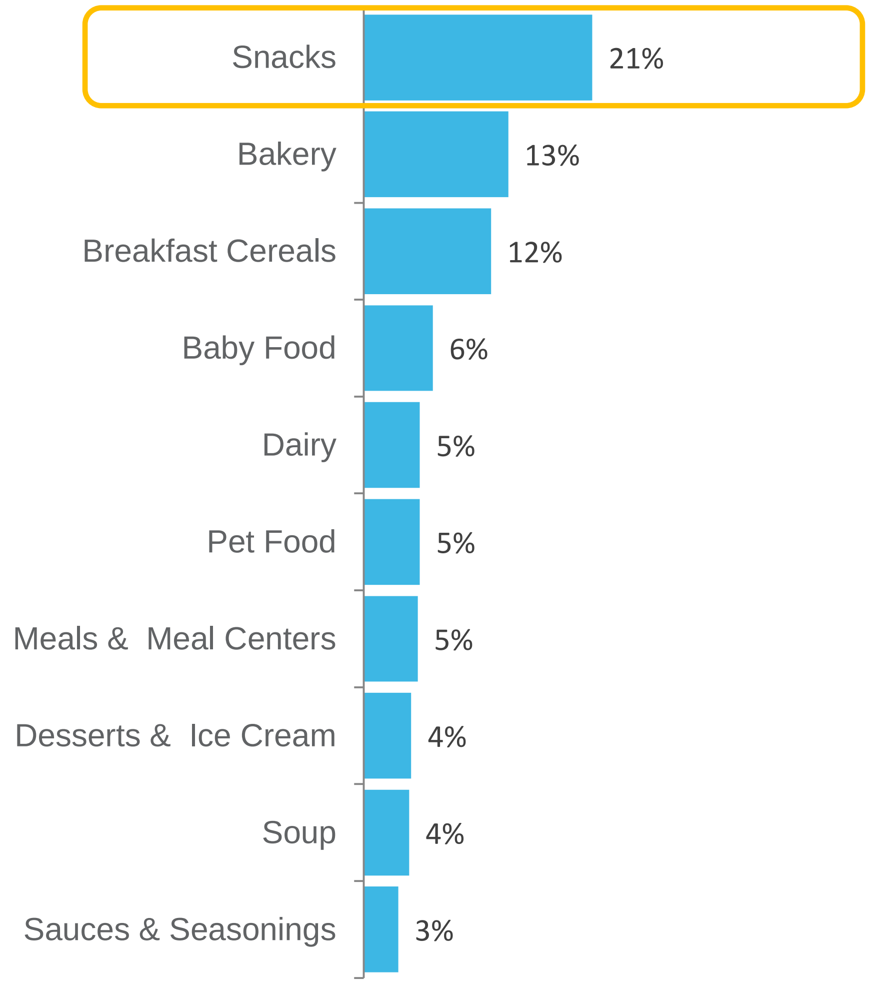
Pumpkin Launches
Country & Categories

- The most active countries for launches in the last 3 months were the USA, Germany and Canada, on trend with Wave 1.
- Snacks was the dominant category in the last 3 months for launches.

Top 10 Launch Countries



Top 10 Launch Categories



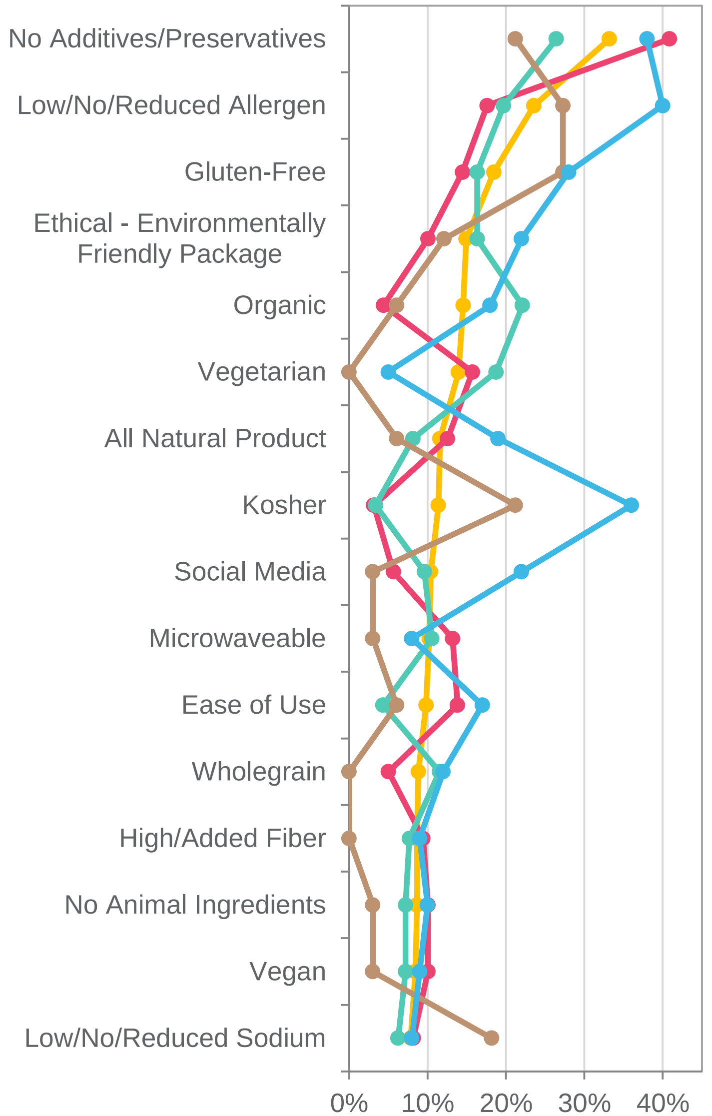
Number of Global Pumpkin NPD for the L3M N=509

Pumpkin Launches

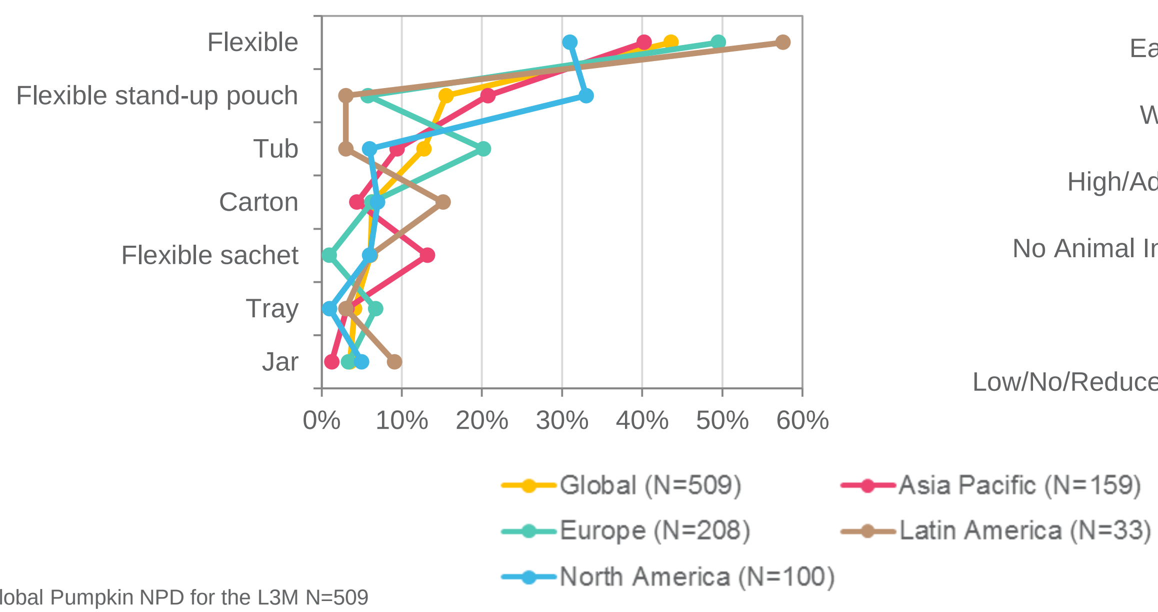
Top Claims & Pack Formats Used

- Top Claims for launches globally were No Additives/Preservatives, Low Allergen and Gluten-free. Kosher was also a particularly prominent claim in North America.
- Flexible packaging dominated the launches in the last 3 months for pumpkin products.

Top Claims Used



Pack Formats Launched



Number of Global Pumpkin NPD for the L3M N=509
Only regions with n >30 are displayed

Innovative Pumpkin Launches:
L3M (August–October 2013)

Bolthouse Farms Limited Edition Pumpkin Spice Latte (USA)

Bolthouse Farms Limited Edition Pumpkin Spice Latte is made with real pumpkin purée. This season favorite coffee beverage is certified kosher and free from gluten, preservatives and fat. Each serving provides 7g protein and 30% of the daily value of calcium.

Claims:
No Additives/Preservatives, Low/No/Reduced Allergen, Seasonal, Ethical - Environmentally Friendly Package, Kosher, Low/No/Reduced Fat, Gluten-Free, Limited Edition

Sof'ella Gourmet Natural Foods Pumpkin Spice Bread Mix (USA)

Sof'ella Gourmet Natural Foods Pumpkin Spice Bread Mix is a gourmet mix with the festive and fall flavors of spice and pumpkin. It can be simply made by adding oil, eggs and water. The all natural product retails in a 1-lb. pack.

Claims:
Ease of Use, All Natural Product

Renée Voltaire Dark Chocolate Coated Pumkin Seeds (Finland)

Renée Voltaire Tummalla Suklaalla Kuorrutettuja Kurpitsansiemeniä (Dark Chocolate Coated Pumpkin Seeds) are organic roasted pumpkin seeds covered in organic dark chocolate. The product is said to be super tasty and is retailed in a 55g recyclable pack.
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Claims:
Organic, Ethical - Environmentally Friendly Package

Giant Eagle Market District Pumpkin Hummus (USA)

Giant Eagle Market District Pumpkin Hummus is a gluten and cholesterol free food. This limited-edition product is all natural, has been kosher certified and retails in an 8-oz. tub.

Claims:
All Natural Product, Low/No/Reduced Allergen, Low/No/Reduced Cholesterol, Kosher, Gluten-Free, Limited Edition

Source: Mintel (2013)

Innovative Pumpkin Launches:
L3M (August–October 2013)

Vital Âtman Ômegas Gourmet Pumpkin Seed & Basil Oil (Brazil)

Vital Âtman Ômegas Gourmet Óleo de Semente de Abóbora & Manjericão (Pumpkin Seed & Basil Oil) is made with extra virgin oil. This product is free of gluten, contains 60% of omega 6, and retails in a 180ml pack.

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

Pillsbury Pumpkin Cookies with Cream Cheese Flavored Chips (USA)

Pillsbury Pumpkin Cookies with Cream Cheese Flavored Chips are now available for Fall 2013. The kosher certified product is ready to bake and retails in a 14-oz. pack, containing 12 big cookies.

Claims:
Ease of Use, Seasonal, Kosher

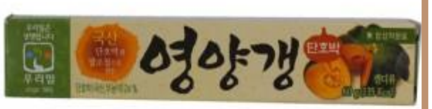
Laurel Hill Pumpkin Seed Tortilla Chips (USA)

Laurel Hill Pumpkin Seed Tortilla Chips are described as a hearty blend of pumpkin, sweet spices and pumpkin seeds. They are said to be perfect right out of the bag or as a dipping companion. This all natural, wholegrain product is kosher certified and free from trans fat and gluten.

Claims:
All Natural Product, Low/No/Reduced Allergen, Kosher, Social Media, Gluten-Free, Low/No/Reduced Transfat, Wholegrain

Woorimil Sweet Pumpkin Jelly Bar (South Korea)

Woorimil Yeongyanggaeng (Sweet Pumpkin Jelly Bar) is made with 24% pesticide-free sweet pumpkin and rice syrup. The product contains no artificial flavourings and retails in a 60g pack



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

Source: Mintel (2013)

Innovative Pumpkin Launches:
L3M (August–October 2013)

Sprout Organic Toddler Snacks Banana Pumpkin Yogurt (USA)

Sprout Organic Toddler Snacks are new to the range. The snacks are specially designed for toddlers from at least 12 months or older, and contain no preservatives or artificial colors, and are made with real fruit and yogurt.

Claims:
No Additives/Preservatives, On-the-Go, Time/Speed, Portionability, Ease of Use, Organic, Babies & Toddlers (0-4)

Kimseongmo Food Pumpkin Bean Curd Snack (South Korea)

Kimseongmo Food Pumpkin Bean Curd Snack is made with natural ingredients including 10% of sweet pumpkin and 35% bean curd. This product is fried using sunflower oil, is rich in vitamin A and E, and is said to be healthy snack for the whole family

Claims:
N/A

KIND Healthy Grains Maple Pumpkin Seeds with Sea Salt (USA)

KIND Healthy Grains Maple Pumpkin Seeds with Sea Salt Bars are now available. They are described as chewy with a crunch. The product contains 18grams 100% whole grains per bar, and is free from gluten and GMO.

Claims:
All Natural Product, Low/No/Reduced Allergen, GMO-Free, High/Added Fiber, Kosher, Ethical - Environmentally Friendly Package, Gluten-Free, Social Media, Wholegrain

BetterOats Oat Revolution! Seasonal Blend Instant Oatmeal (USA)

BetterOats Oat Revolution! Seasonal Blend Instant Oatmeal with Chia consists of 100% whole grain instant oats with added antioxidants and chia, a good source of ALA omega-3, with a bold shot of flavor. This microwavable and kosher product retails in a 49.38-oz.

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

Source: Mintel (2013)

Top Australian Pumpkin Launches:
L3M (August–October 2013)

Simplee Soup in a Cup Pumpkin with Croutons

Heinz Little Kids Fruit & Veg Shredz Snack

Farex Dinners Couscous with Cheesy Vegetables

DariKay Thai Pumpkin Soup

Passage Foods Pasta Sauce For Kids Carrot, Pumpkin Sauce

Mrs. May's Naturals Pumpkin Crunch Snack

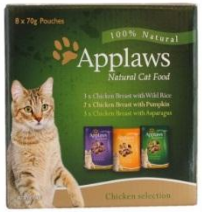
Macro Wholefoods Gluten Free Café Style Berry Crunch Cereal

Coles Simply Gluten Free Vanilla & Cranberry Clusters

Macro Wholefoods Gluten Free Nutty Muesli

Black & Gold Minestrone Soup

Applaws Chicken Selection Pouches



Fino Premium Citrus Flavoured Jells

Source: Mintel (2013)

In the Media.

General Vegetable News (August–October 2013)

- Vegetable consumer price index for the September quarter fell by 4.5%; compared with this time last year vegetable prices are down approximately 10%.

(AUSVEG)

- The general food and beverage manufacturing industry has stabilised last year after decline, this included an increase in exports.

(www.abc.net.au)

- Simplot will provide 100% of Woolworths' private label frozen vegetables. Simplot have also announced that their Bathurst and Devonport facilities will remain open for at least 3 years.

(www.abc.net.au)

Commodity News
(August–October 2013)

- Coloured cauliflower hybrid types (green, orange and purple) are full of nutrients, making them healthier than white cauliflower. Green cauliflower is high in Vitamin C and fibre. Orange contains carotene (Vitamin A) and the purple is full of antioxidants.

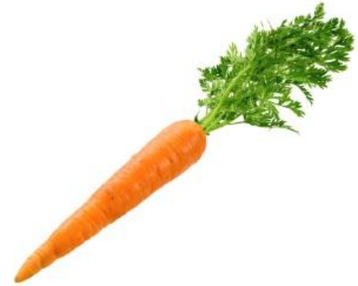
(www.dailymail.co.uk)

- Demand for Jacko Pumpkins for Halloween has dramatically increased over the last few years.

(www.abc.net.au/news)

- When purchasing a pumpkin look for a hard skin and avoid any that have splits or cracks. Pumpkin is best stored under cooler conditions.

(www.krzk.com)



- Harvard University has found that Carrot antioxidants increase male fertility.

(Herald Sun)

- Green beans are found to protect your heart, speed up blood clotting, delay aging due to Vitamin A and are rich in fibre.

(www.speakingtree.in)