

A close-up photograph of a person's hand holding a freshly harvested carrot. The carrot is orange with some soil on its surface. In the background, several other carrots are hanging vertically, and there are green leafy plants, possibly chard or spinach, in a garden setting.

# Horticulture Australia and AUSVEG.

VG12078 Project Harvest.

**Monthly Tracker Report Wave 4: September 2013**

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# Background & Methodology.

# ➤➤➤ Background & Setting the Scene.

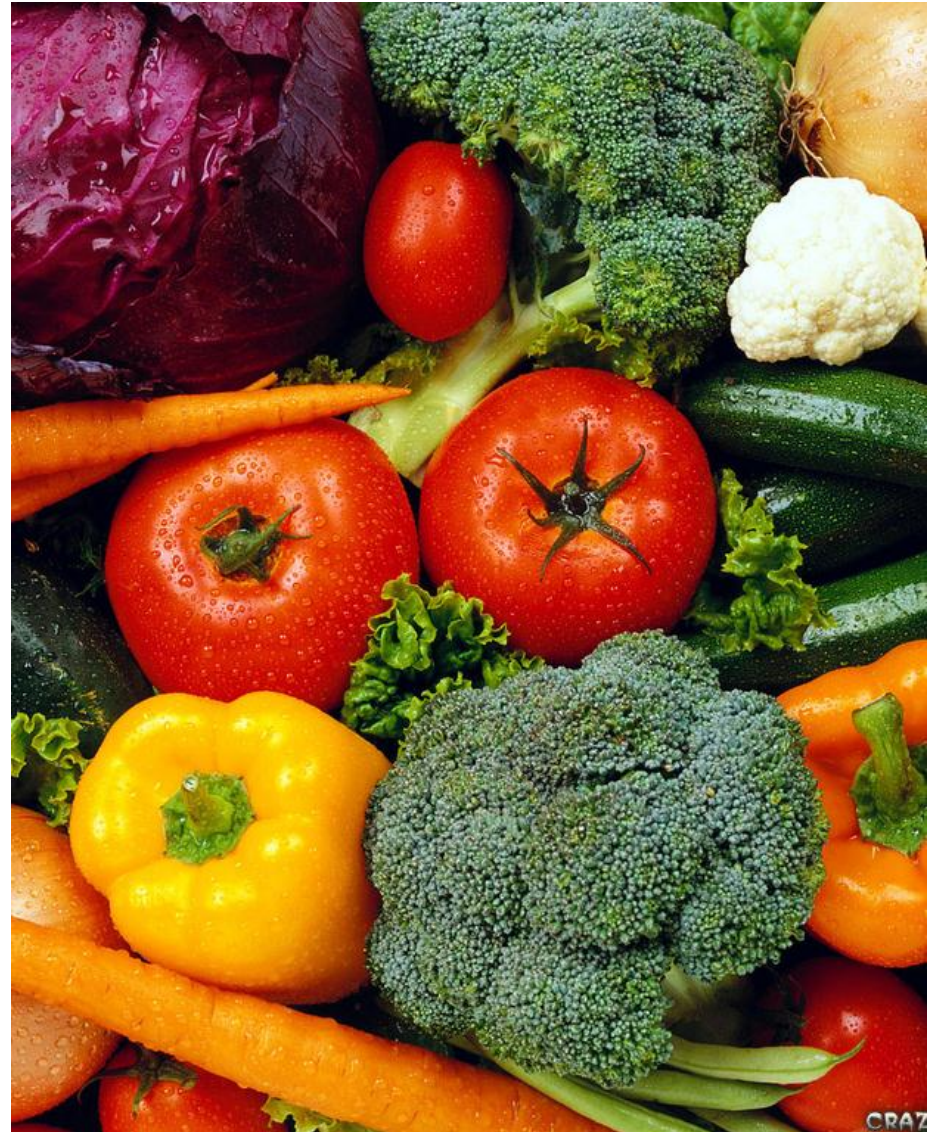
There is an increasing need in Australia's Horticulture Industry to monitor and gauge consumer perception and behaviour in relation to fresh vegetables.

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 4, September 2013) focuses on:

- Asian Vegetables
- Baby Spinach
- Brussels Sprouts
- Capsicums







# 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, 741 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 (Asian Vegetables, Baby Spinach, Brussels Sprouts & Capsicum) within the last month
- ⇒ Were the main or joint grocery buyer

	Total N=812	Asian Vegetables n=421	Baby Spinach n=499	Brussels Sprouts n=319	Capsicum n=501
<b>Gender</b>					
Male	40%	39%	36%	41%	40%
Female	60%	61%	64%	59%	60%
<b>Age</b>					
18-24 y.o.	9%	8%	10%	6%	8%
25-34 y.o.	17%	18%	20%	11%	17%
35-44 y.o.	14%	14%	15%	9%	13%
45-54 y.o.	19%	23%	20%	18%	18%
55-64 y.o.	22%	20%	21%	28%	24%
65+ y.o.	19%	17%	14%	28%	21%
<b>Household</b>					
Single Income no Kids	21%	20%	18%	23%	19%
Double Income no kids	16%	16%	18%	13%	16%
Young Families	14%	14%	16%	10%	14%
Established Families	21%	23%	24%	18%	21%
Empty Nesters	28%	26%	25%	36%	29%
<b>Location</b>					
New South Wales	35%	39%	35%	34%	33%
Victoria	20%	19%	21%	18%	20%
South Australia	8%	7%	9%	11%	9%
Queensland	20%	20%	20%	19%	21%
Western Australia	11%	9%	10%	12%	11%
Tasmania	3%	1%	2%	3%	3%
Australian Capital Territory	2%	3%	3%	2%	2%
Northern Territory	1%	1%	1%	1%	1%



# Trends Research: Our Approach

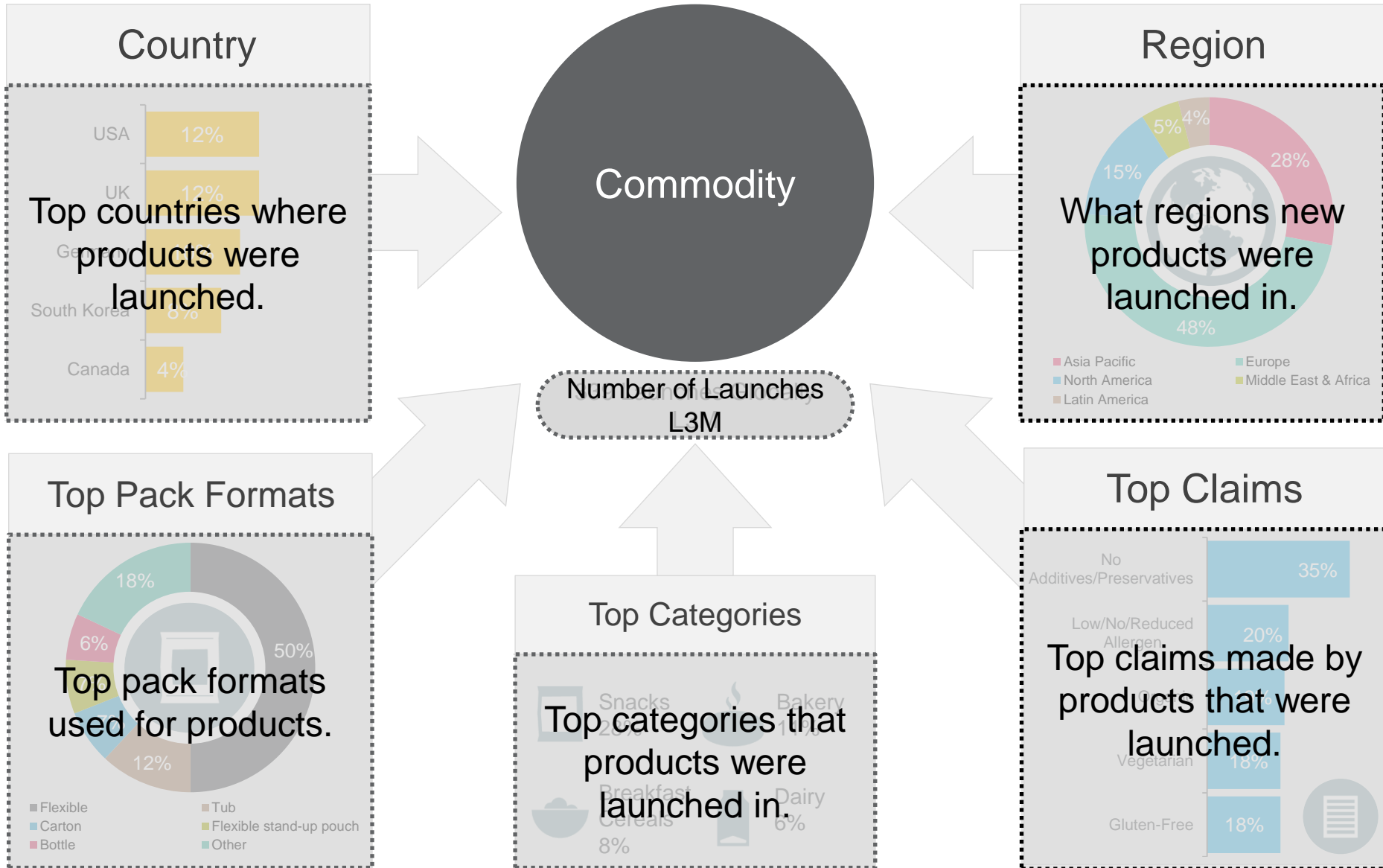


- ▶ Colmar Brunton has used a combination of both desk research and in the field market research to explore the trends of each vegetable commodity being tracked this month.
- ▶ Our main source of secondary data for this report was collected from Mintel Global New Products Database (GNPD).
- ▶ This data 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 4: Executive Summary



## Wave 4: Top 5 Insights

- Overall, this wave's vegetables had lower satisfaction, but relatively high endorsement and recommendation. This indicated that consumers are settling when it comes to selection and consumption. A key goal of the vegetable industry is to increase consumers vegetable repertoire and consumption. This could be achieved with increasing vegetable freshness and quality, which should drive consumer satisfaction.
- Asian vegetables had strong category health, with high importance and future purchase intent. Previous waves, including this, also indicate that there is an increasing trend towards cooking Asian cuisine. In contrast to this, the only Asian vegetable launches in Australia were instant soups, this suggests that there is an opportunity for new product launches that include Asian vegetables as a key component.
- New product launches of baby spinach had a strong presence in the baby food category. Trends research indicated that convenient, healthy baby food is a growing market and an opportunity exists for further grow this category to include baby spinach and other nutrient-rich vegetables.
- The main barriers to consume more capsicum was 'Already use enough' and 'Not knowing enough recipes' that use capsicum. The main cooking cuisine and style was Asian stir-frying. Education of other cooking styles and cuisines, such as Mediterranean and Mexican, will inform consumers of alternative uses for capsicum and reduce barriers to future purchase.
- The majority of commodities tracker with Harvest are purchased fresh. Triggers to purchasing frozen vegetables were convenience, freshness, longevity and availability. The fresh vegetable market can negate these triggers by offering pre-prepared vegetables (ie. Peeled beans), increase freshness and availability. This may require development of new types of vegetables, but overall interest in new varieties and future purchase intent was relatively high.



# Wave 4: Fact Base

(1 of 2)

## Asian Vegetables:

- ▶ Asian vegetables had relatively high levels of importance, endorsement and interest in new types. Future purchase intent is high compared to all commodities tracked thus far.
- ▶ Purchase of Asian vegetables occurred 5.1 times per month and was consumed on average 8.6 times per month.
- ▶ Overall, Asian vegetables were perceived to be good value for money. Consumers on average purchase 690g of Asian vegetables, typically in the format of individual Asian vegetables. Recalled last spend was \$5.58.
- ▶ Pricing tracking for September 2013 revealed that pricing varied by a dollar across states (excluding price promotions), with the average price for Pak Choy \$2.07 each.
- ▶ Buk Choy is the type of Asian vegetable with the highest spontaneous awareness, followed by Choy Sum, but 36% did not know any types of Asian vegetable.
- ▶ Asian vegetables were expected to stay fresh for 6 days, which was usually met most of the time.
- ▶ Top triggers for purchase were being easy to cook with, they cook quickly and are healthy and taste great.

## Baby Spinach:

- ▶ Baby spinach had relatively high levels of importance and endorsement. Future purchase intent is high compared to all commodities tracked thus far.
- ▶ Purchase of Baby spinach occurred 4.4 times per month and was consumed on average 9.3 times per month.
- ▶ Overall, Baby spinach was perceived to be fairly good value for money. Consumers on average purchase 440g of baby spinach, typically in the format of pre-packed small bags. Recalled last spend was \$3.80.
- ▶ Pricing tracking for September 2013 revealed that pricing was largely consistent across states and stores, with the average price being \$16.77 per kilo.
- ▶ 80% of respondents could not name any types of baby spinach.
- ▶ Baby spinach was expected to stay fresh for 6 days, which was usually met most of the time.
- ▶ Top triggers for purchase were the health and nutrition benefits, and baby spinach is easy to cook with.





# Wave 4: Fact Base

(2 of 2)

## Brussels Sprouts:

- Brussels sprouts had lower levels of importance and endorsement than the other commodities tracked this month. Future purchase intent is on par with all commodities tracked thus far.
- Purchase of Brussels sprouts occurred 3.2 times per month and was consumed on average 5.8 times per month.
- Overall, Brussels sprouts were perceived to be fairly good value for money. Consumers on average purchase 610g of Brussels sprouts, typically in the format of individual Brussels sprouts. Recalled last spend was \$3.61.
- Pricing tracking for September 2013 revealed that pricing varied across states and stores, with the average price being \$9.43 per kilo and the price range being \$7.98.
- 84% of respondents could not name any types of Brussels sprouts.
- Brussels sprouts were expected to stay fresh for 8 days, which was met most or all of the time.
- Top triggers for purchase were health and nutrition benefits, enjoying the taste and to provide a variety of vegetables.

## Capsicum:

- Capsicums had relatively high levels of importance and endorsement. Future purchase intent is higher than other commodities tracked thus far.
- Purchase of capsicums occurred 4.4 times per month and was consumed on average 10.3 times per month.
- Overall, capsicums were perceived to be fairly good value for money. Consumers on average purchase 680g of capsicums, typically in the format of individual capsicums. Recalled last spend was \$3.89.
- Pricing tracking for September 2013 revealed that pricing varied across states and stores, with the average price of a green capsicum being \$4.75 per kilo and the price range being \$4.00.
- 50% of respondents named red capsicums and green capsicums as types that they were aware of, but 44% of respondents could not name any types of capsicum.
- Capsicums were expected to stay fresh for 8 days, which was met most of the time.
- Top triggers for purchase were their flavour and colour, as well as being easy to use as an ingredient in dishes.



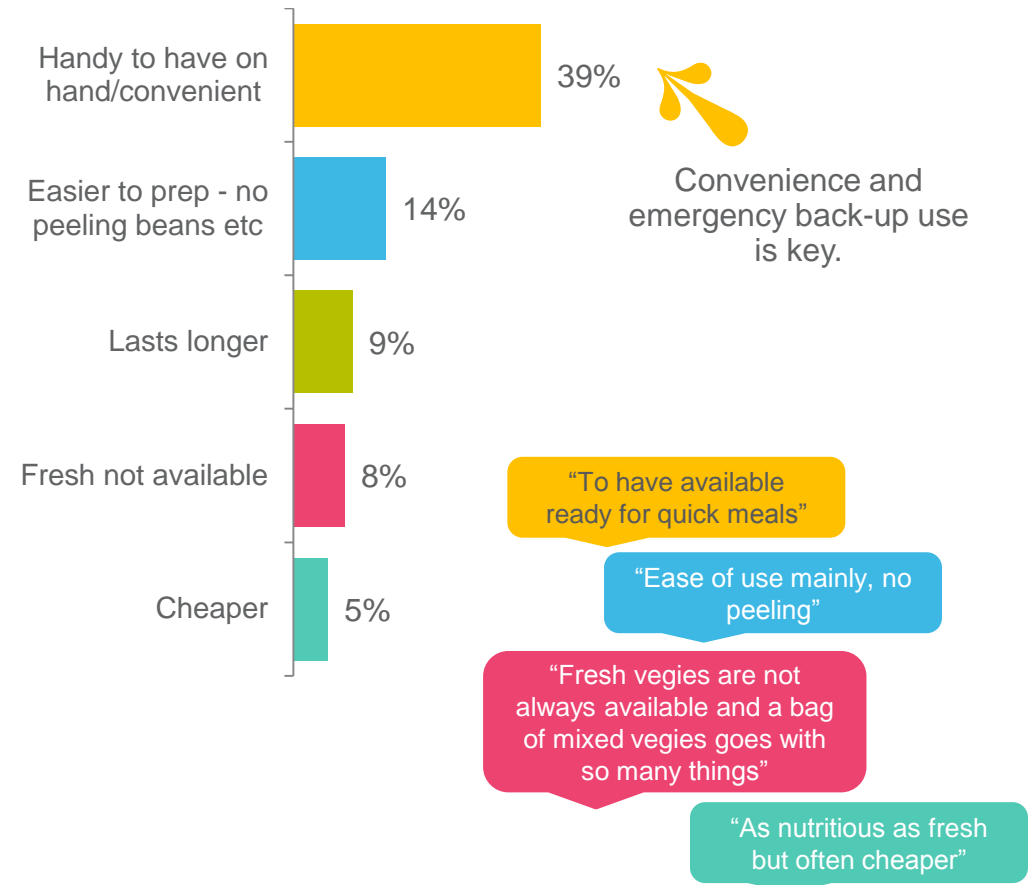
Wave 4:  
Ad-Hoc Questions



# Additional Monthly Questions Asked

⇒ The main reason for purchasing frozen vegetables was for the convenience of having them on hand: if fresh vegetables were not available in store, if vegetables were needed on short notice to make an extra meal or if people run out of fresh vegetables.

## Reasons frozen vegetables are purchased



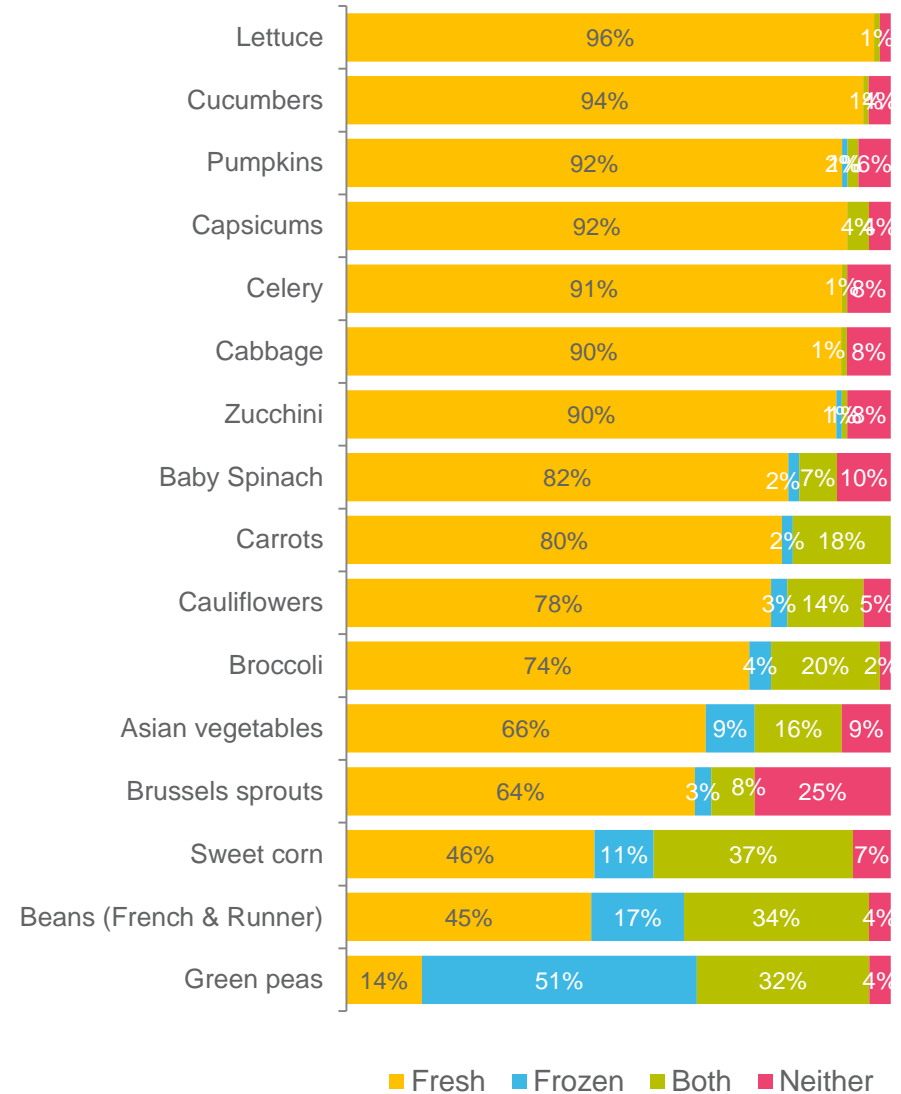




# Additional Monthly Questions Asked

- ⇒ The majority of vegetables were exclusively purchased fresh.
- ⇒ The dominant vegetable purchased frozen were green peas.
- ⇒ Compared to other vegetables, sweet corn and green beans were commonly purchased both fresh and frozen.

## Ways Vegetables Are Purchased

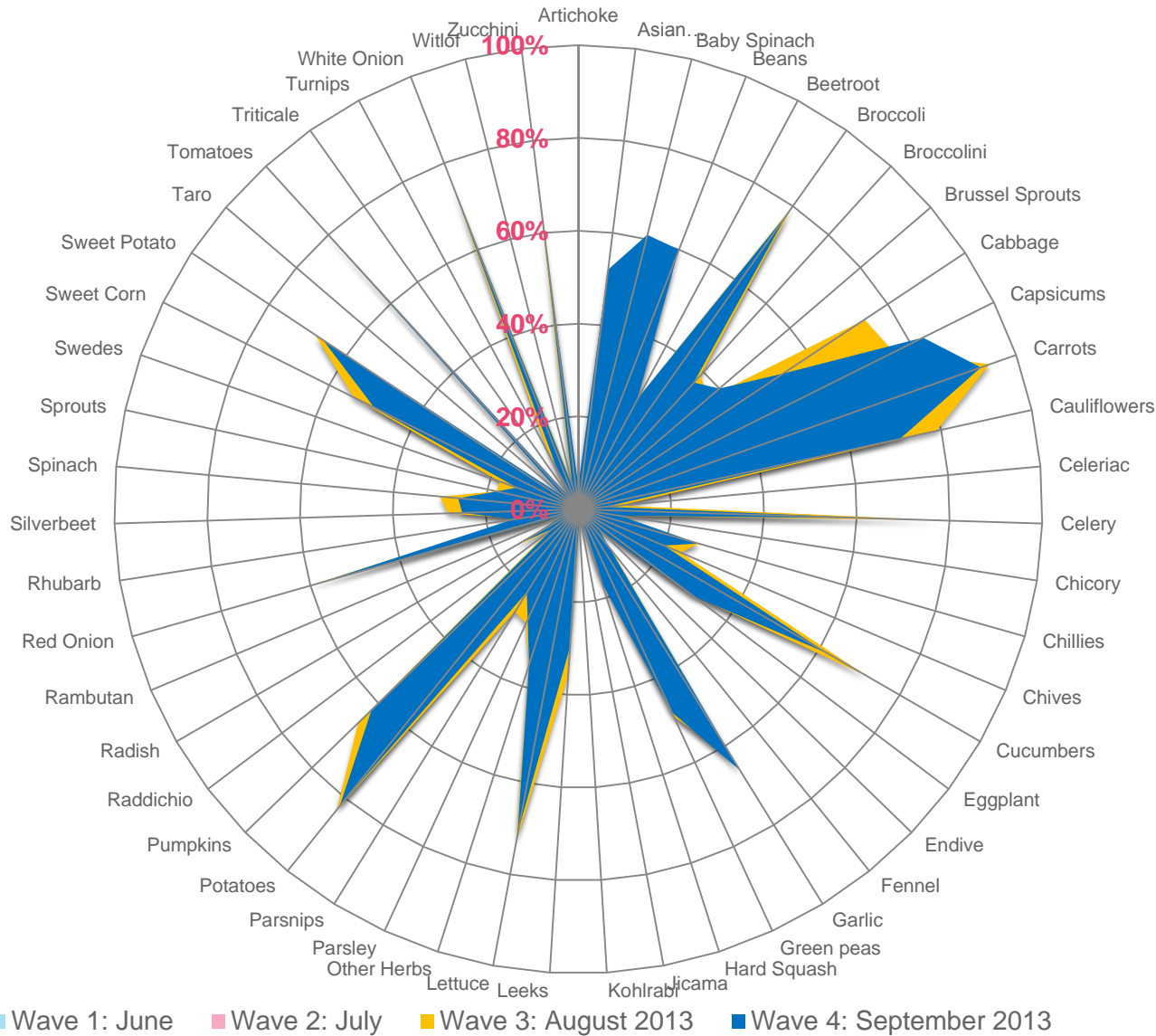




# Wave 4: Overall Vegetable Tracking



# Vegetables Purchased Last Month



- Vegetables reported as purchased decreased slightly with the last month compared with previous waves.
- Specifically the purchase of celery, zucchini, cabbage and cucumber has decreased.
- Carrots, tomatoes, capsicums and potatoes, were the most purchased vegetable commodities this month.





# Category Health

- ▶ Asian vegetables, baby spinach and capsicum had high levels of importance and higher than average consumer interest in new varieties.
- ▶ All of this month's commodities, except Brussels sprouts, exceeded the Harvest mean for endorsement, suggesting a higher than average propensity to recommend these vegetables is likely.
- ▶ With the exception of Capsicum, all other commodities this month fell below the Harvest Mean for satisfaction.
- ▶ There was high stated increased future purchase intent for Asian vegetables. This indicates a healthy growth opportunity may be available.

	Asian Vegetables	Baby Spinach	Brussels Sprouts	Capsicum	Harvest Total Mean
Importance	7.3	7.0	6.4	7.2	6.3
Satisfaction	6.5	6.6	6.5	7.2	6.7
Endorsement	7.5	7.3	6.6	7.3	6.8
Interest (New Types)	7.2	6.6	6.2	6.7	6.2
Future Purchase					
More	27%	20%	12%	17%	11%
Same	72%	79%	84%	83%	87%
Less	1%	1%	4%	1%	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?

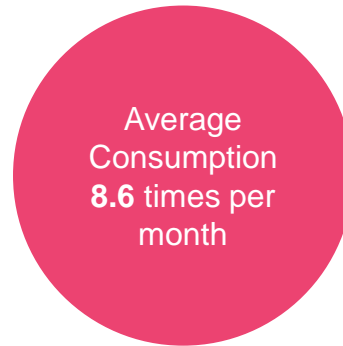
Harvest Total Mean is the mean of all commodities from Wave 1, up to and including current wave.



Asian  
Vegetables.

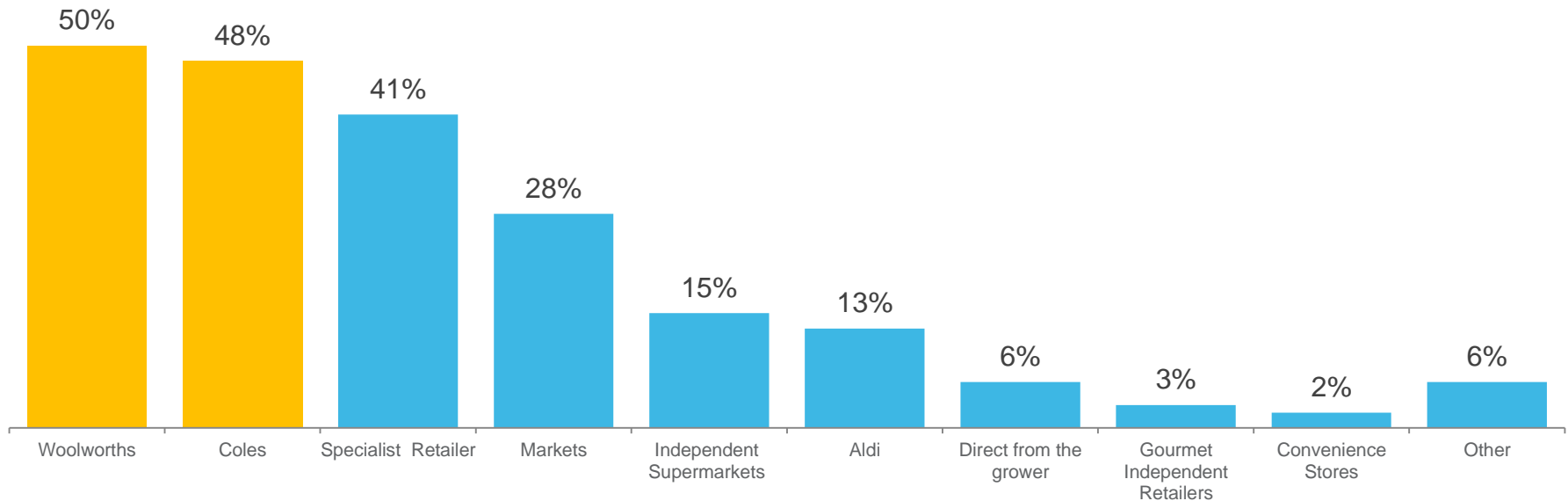
# Purchase and Consumption Behaviour

## Asian Vegetables



- ⇒ Asian vegetables were purchased on average 5 times a month and consumed twice a week.
- ⇒ Asian vegetables were most commonly purchased at mainstream retailers (Woolworths and Coles). There is a relatively large propensity to purchase Asian vegetables at specialist retailers.

### 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 N=421

# ⇒ Average Spend & Price Sensitivity

## Asian Vegetables



⇒ The average consumer typically purchased **900g** of Asian vegetables.



⇒ The average recalled last spend was **\$5.58**.

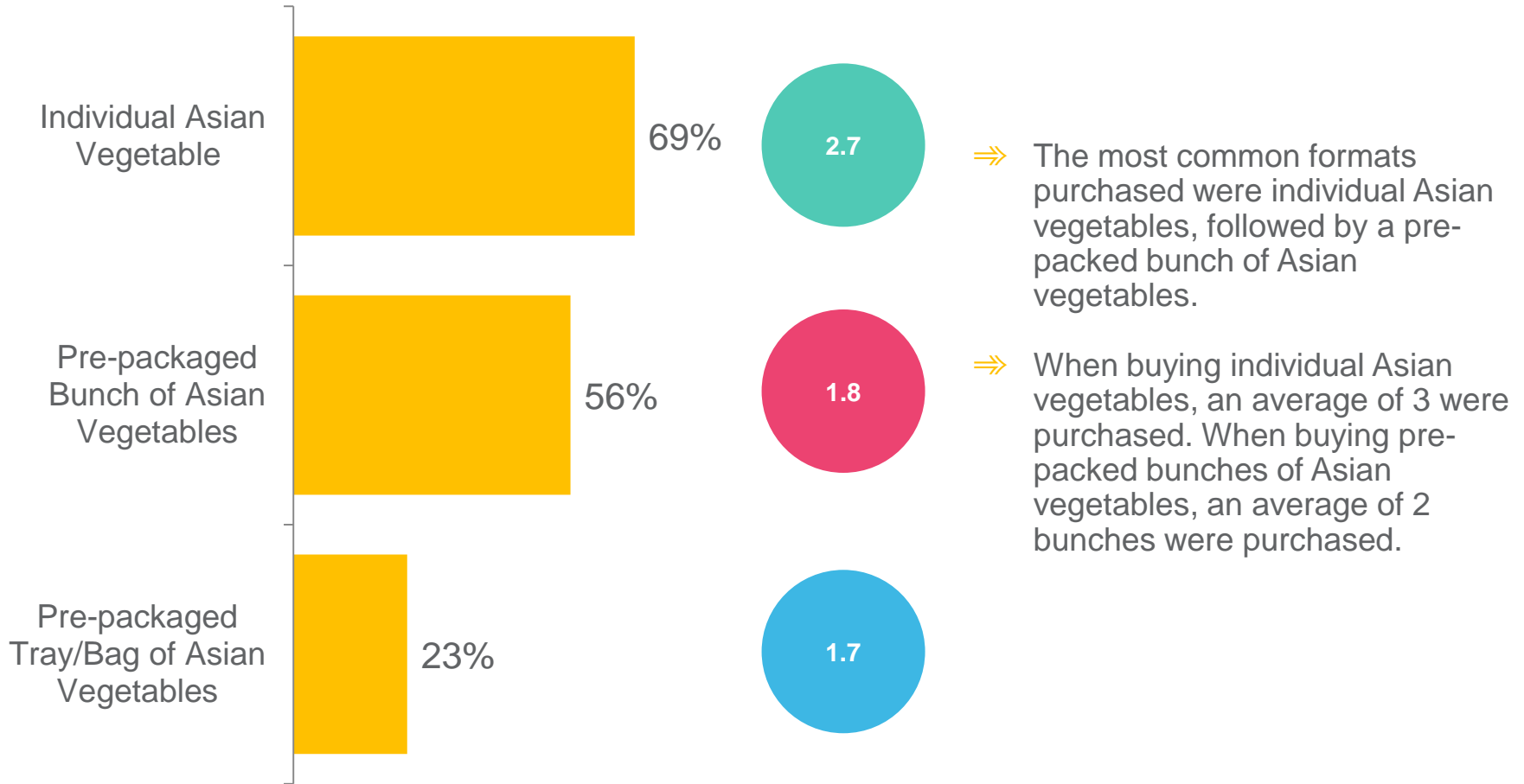


⇒ On average, consumers perceived Asian vegetables to be good value (**6.7/10**).

# ⇒⇒⇒ Pack Formats Purchased

## Asian Vegetables

Amount Purchased  
if Selected (mean)



# Online and In-store Commodity Prices

## Asian Vegetables (Pak Choy)

The average price for Pak Choy in Australia was \$2.07

**Perth, WA**  
Woolworths: \$1.98ea  
Coles: \$1.98ea

**Darwin, NT**  
Woolworths: \$2.48ea  
Coles: \$2.00ea

**Brisbane, QLD**  
Woolworths: \$1.98ea / \$2.48ea  
Coles: **\$1.00ea / \$1.00ea**

**Adelaide, SA**  
Woolworths: \$2.28ea / \$2.28ea  
Coles: \$2.00ea / \$2.00ea

**Sydney, NSW**  
Woolworths: / \$1.98ea  
Coles: \$1.98ea / \$1.98ea

**Melbourne, VIC**  
Woolworths: \$1.98ea / \$1.98ea  
Coles: \$1.98ea / \$1.98ea

**Canberra, ACT**  
Woolworths: \$2.35ea  
Coles: \$1.98ea

**Hobart, TAS**  
Woolworths: \$2.98ea  
Coles: \$2.98ea

- Price per bunch of pak choy was relatively consistent between states and retailers.
- The lowest price stated for Pak Choy was Coles in Brisbane at \$1.00 per bunch on promotion. The highest price was \$2.98 in Tasmania, with a retail range of \$1.98.
- Woolworths in Melbourne had a promotion on Asian Vegetables of 2 for \$3

Pricing was carried out on Wednesday 17<sup>th</sup> September between 10am-12pm.

Prices are displayed Online / In-store.

**Pak choy was not available online from Woolworths in Sydney.**

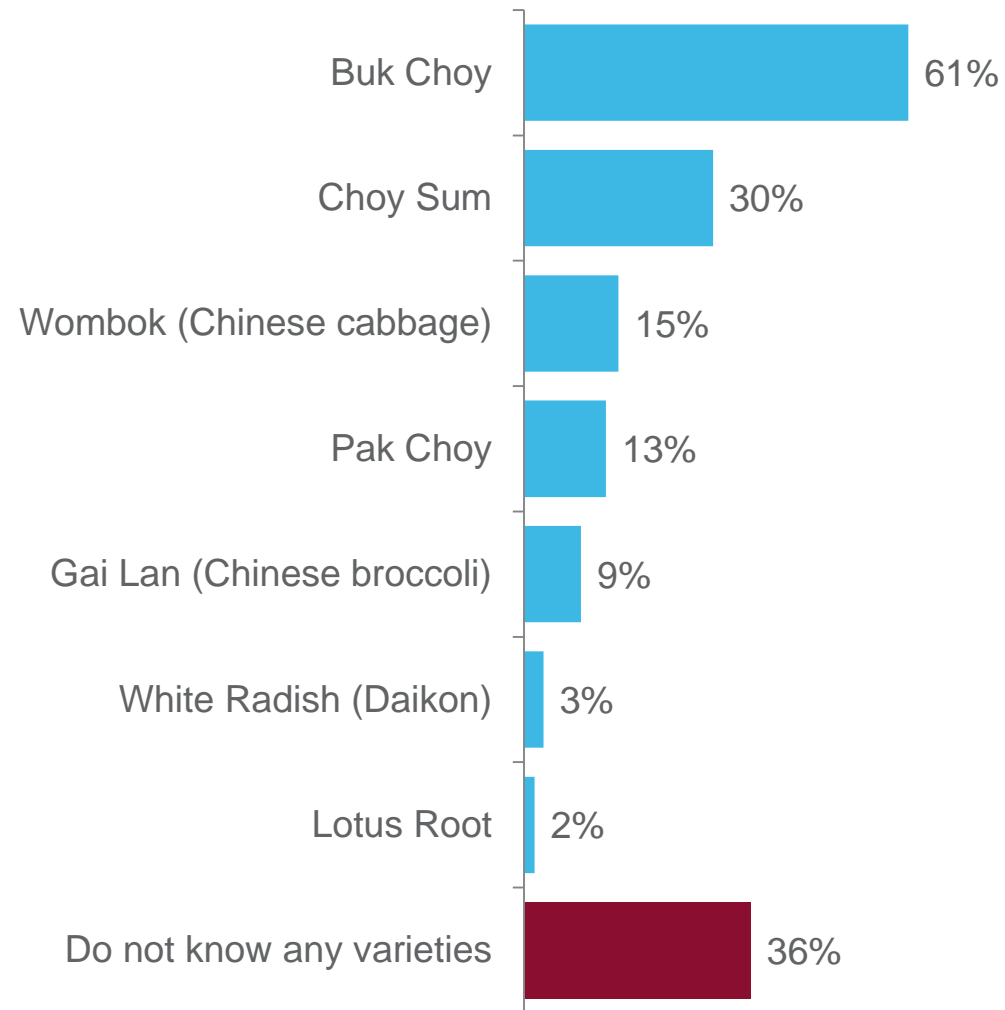
**Green text indicates promotional price.**



# Spontaneous Awareness & Purchase

## Asian vegetables

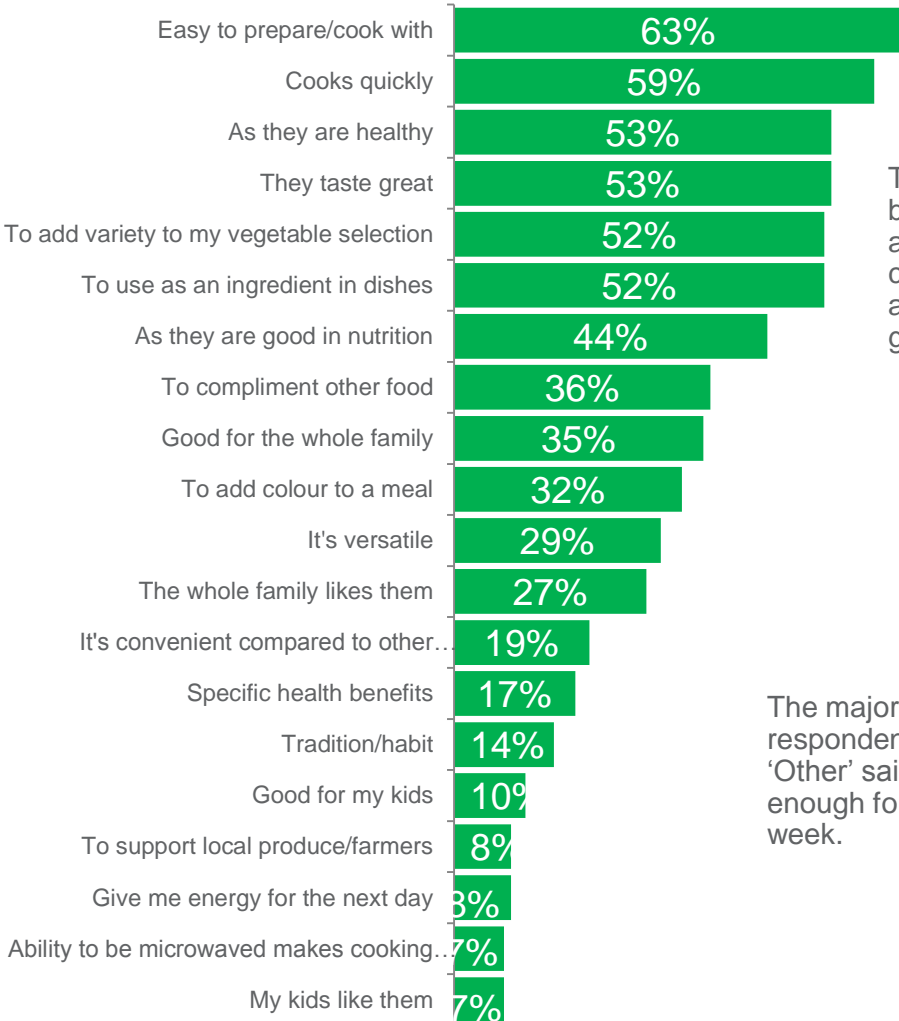
- ▶ 36% of respondents could not name any type of Asian vegetable.
- ▶ 61% of respondents were aware of Buk Choy, of which 9% mentioned baby Buk Choy.
- ▶ Of those respondents who were aware of Gai Lan, 63% knew the vegetable as Chinese broccoli.





# Triggers & Barriers to Purchase Asian Vegetables

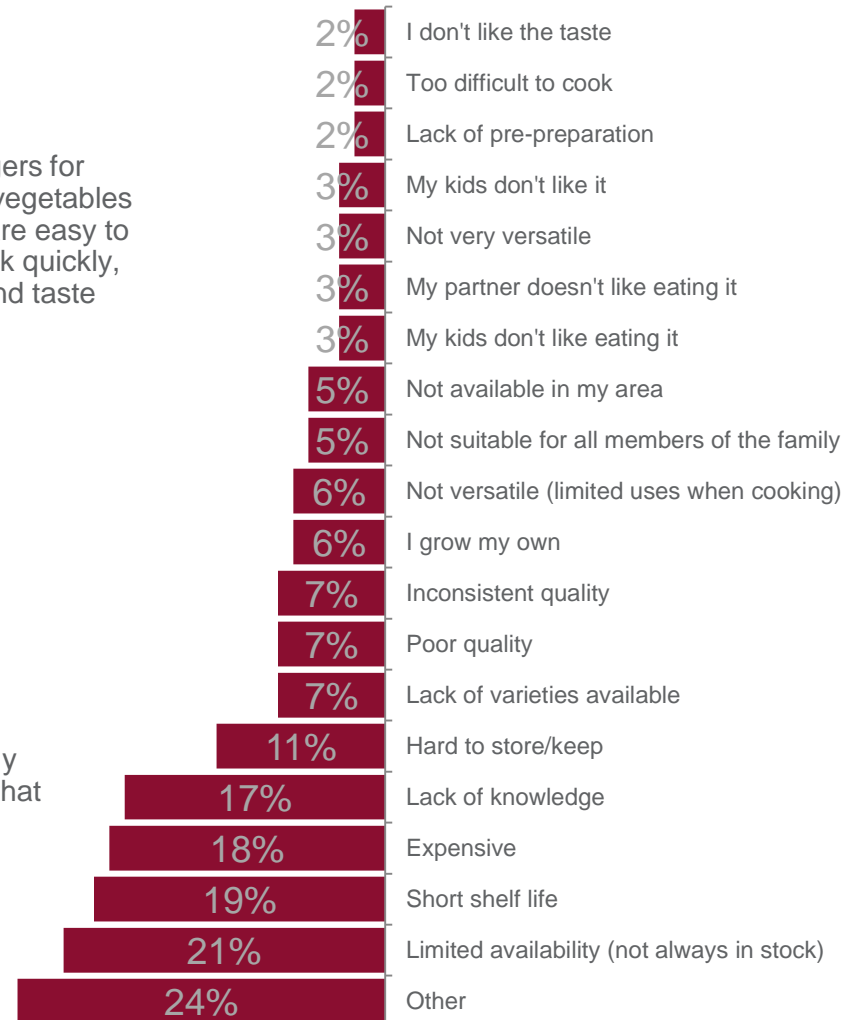
## Triggers



The main triggers for buying Asian vegetables are that they are easy to cook with, cook quickly, are healthy, and taste great.

The majority of respondents who said 'Other' said that they buy enough for their meals that week.

## Barriers



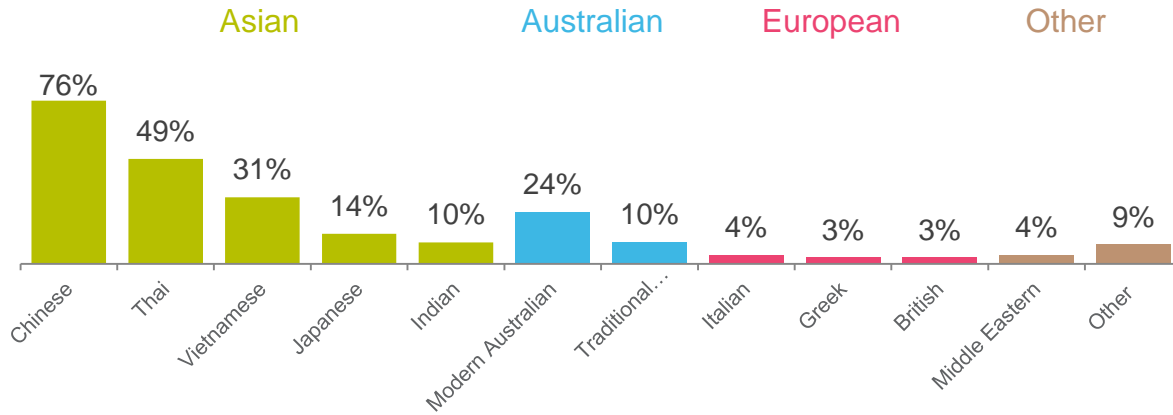
N=421  
 Q7. Which of the following reasons best describes why you purchase <commodity>?  
 Q8. Which reason best describes why you don't buy <commodity> more often?



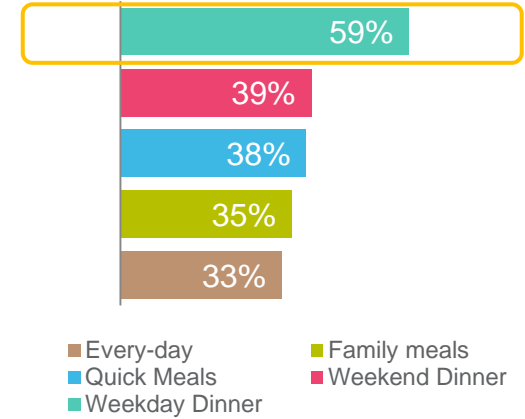
# Cooking Preferences & Occasions: Asian Vegetables

- ⇒ Consumers most commonly used Asian vegetables in Asian cuisines, specifically Chinese, which is reflected in the top cooking style being stir frying.
- ⇒ Asian vegetables were most commonly served with carrots, capsicums and white onions.
- ⇒ Weekday dinners were the top consumption occasion.

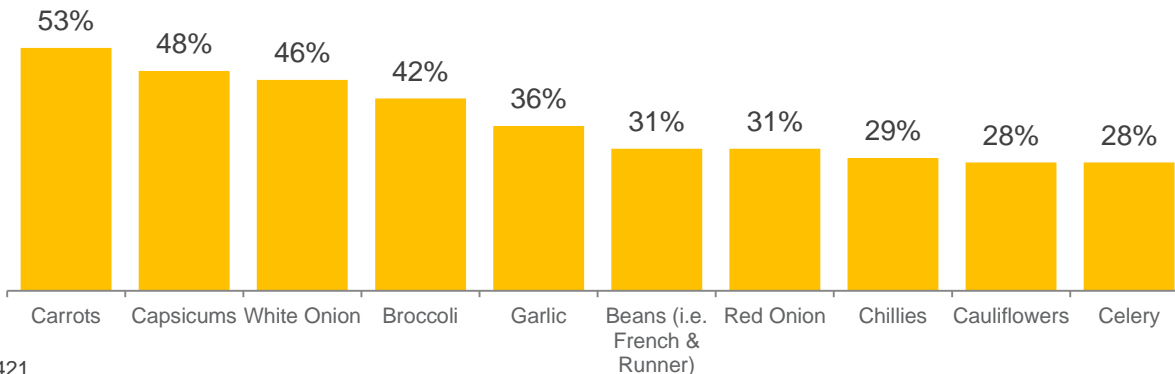
Typical Cuisine Cooked



Top 5 Consumption Occasions



Top 10 Accompanying Vegetables



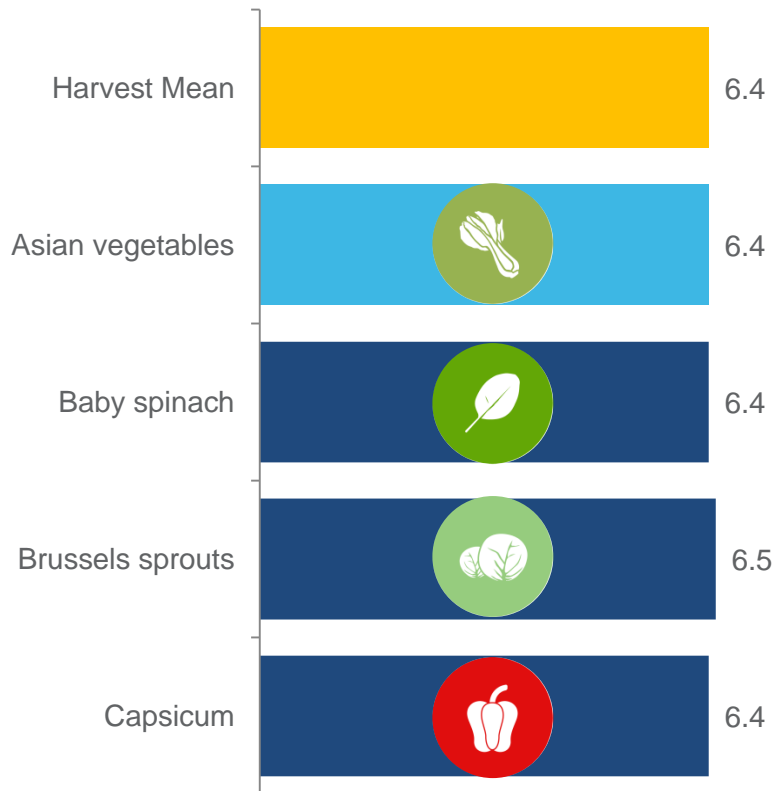
Top 10 Cooking Styles

Stir frying	77%
Steaming	44%
Soup	22%
Boiling	19%
Sautéing	19%
Raw	11%
Microwave	11%
Shallow Frying	11%
Blanche	11%
Stewing (slowcooking)	7%

N=421  
 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

⇒ The provenance of Asian vegetables was fairly important to consumers, on par with all commodities tracked this month and the harvest average.



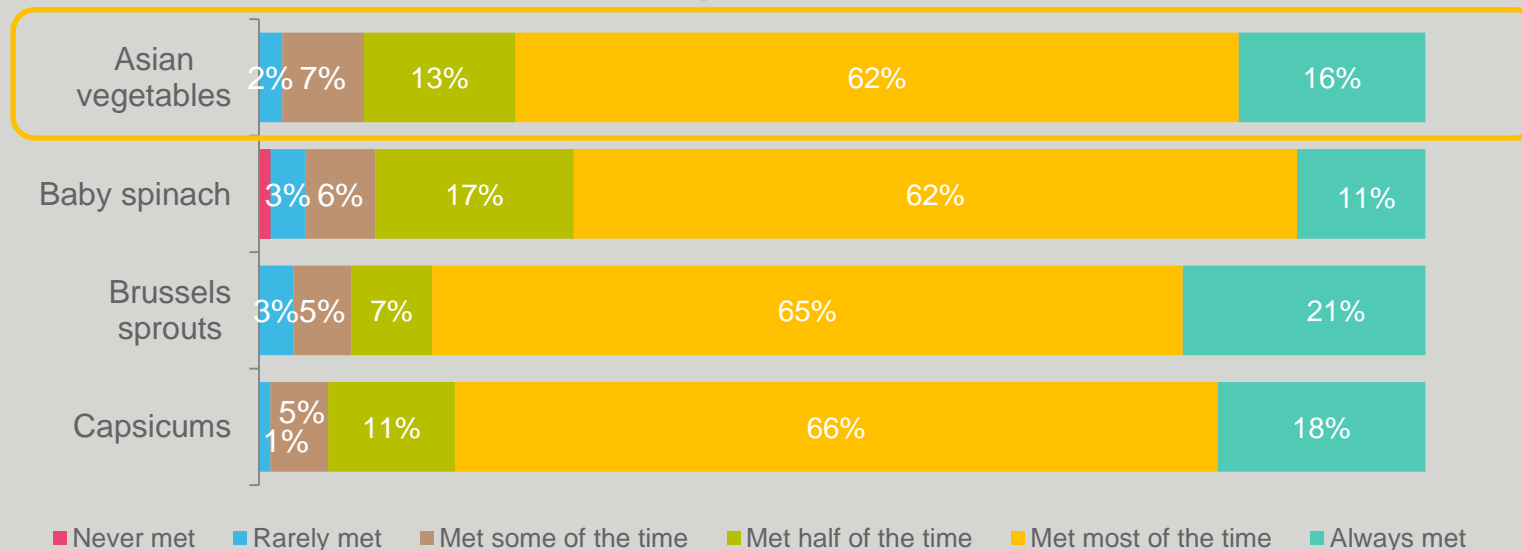
Q14. When purchasing <commodity>, how important is Provenance to you?  
Asian Vegetables N=421  
Baby Spinach N=499  
Brussel Sprouts N=319  
Capsicum N=501

# Freshness and Longevity

Expected to stay fresh for 6 days

- ⇒ Respondents stated that they expected Asian vegetables to stay fresh for 6 days after purchase.
- ⇒ 78% of respondents are satisfied that their expectations are met most of the time or all the time.

## Expectations Met



N=421  
 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: Asian Vegetables



# Asian Vegetables Global NPDs

## July–September 2013

There were 56 global Asian Vegetable launches in the last three months. The majority of these launches occurred in Europe and North America. The top category launches were meals and sauces & seasonings.





## Asian Vegetables Product Launches: Last 3 Months (July-September 2013) Summary

- 56 products containing Asian Vegetables as an ingredient were launched globally. Domestically, there were two soup products launched.
- Europe, North America and Asia Pacific were the primarily regions of Asian Vegetable launches: 54%, 21% and 16% respectively.
- Flexible formats and cartons were the most used packaging for launches.
- A third of category launches were meals and meal centres (36%). Other top category launches were sauces (27%), fruit and vegetables (13%) and snacks (7%).
- Popular claims used were around convenience, including ease of use, microwaveable and time/speed. No additives/preservatives was also a popular claim.
- The most innovative Asian Vegetable product was Oenobiol Activateur Minceur Slimness Activator Supplement (example can be found in the following pages).

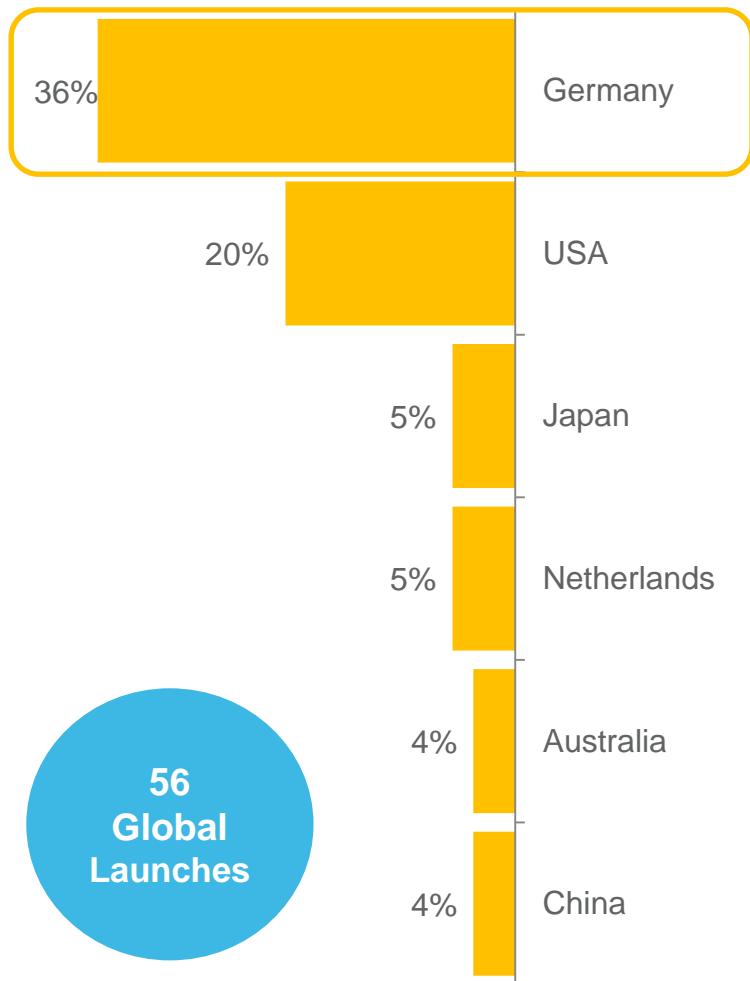


Source: Mintel (2013)

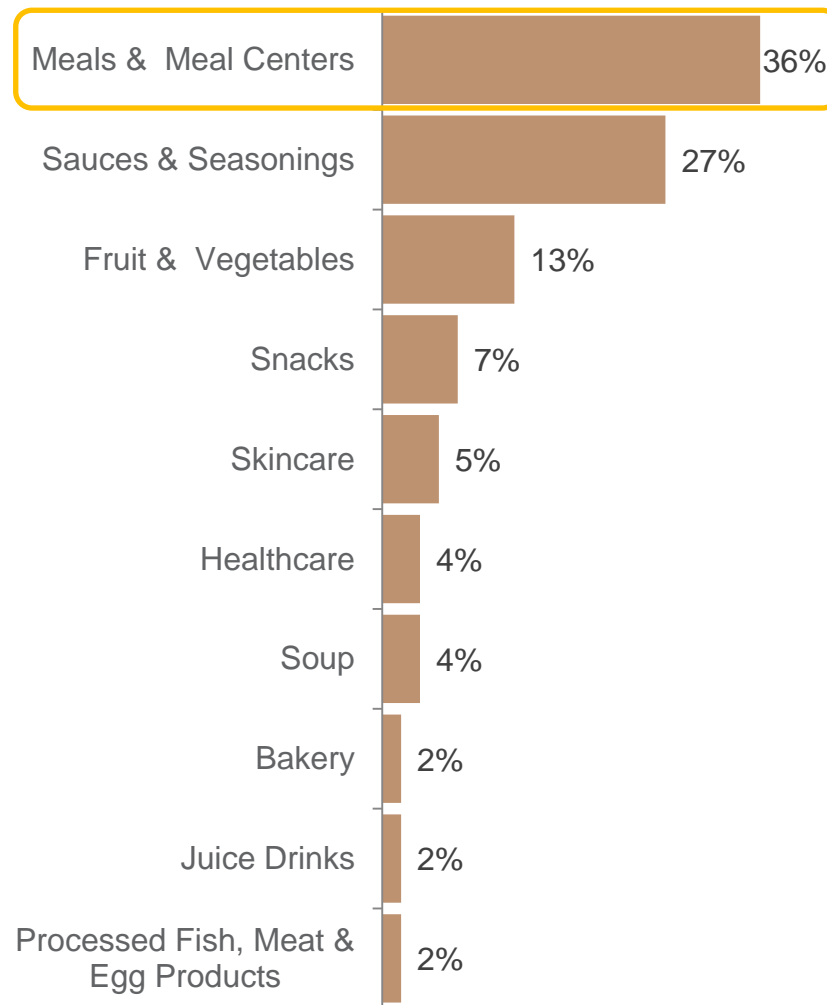
# Asian Vegetables Launches Country & Categories

- ▶ Top launch countries for Asian Vegetables in the last 3 months were Germany, USA and Japan.
- ▶ Meals and meal centres was the category with the most launches, followed by sauces, and fruit & veg.

Top 6 Launch Countries



Top 10 Launch Categories

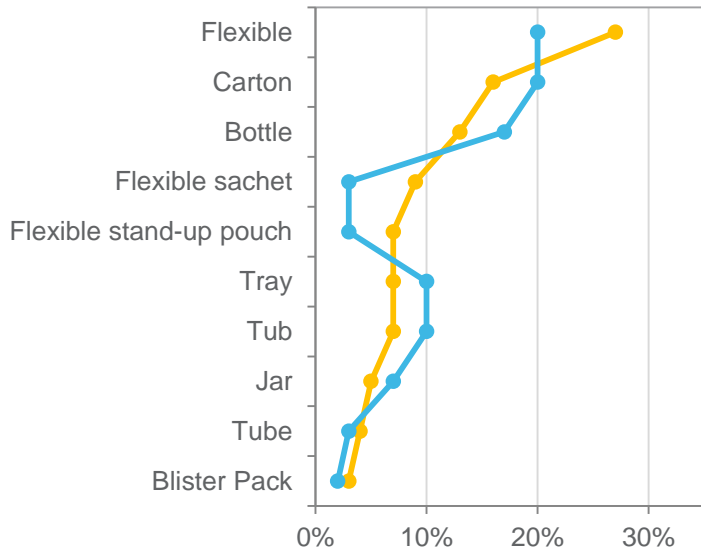


# Asian Vegetables Launches

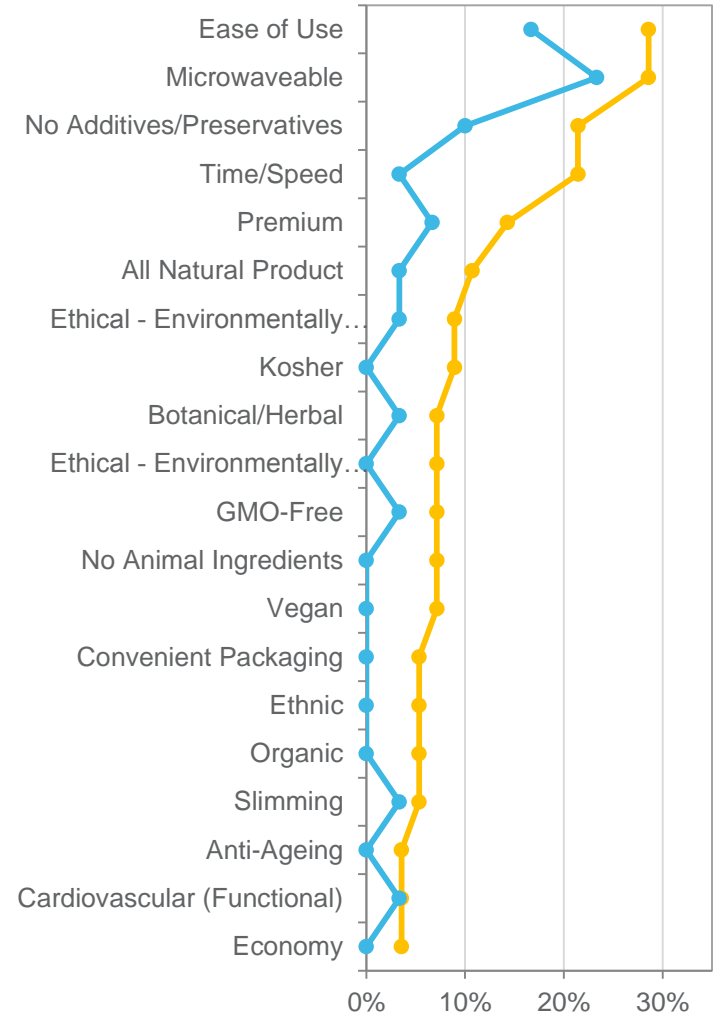
## Top Claims & Pack Formats Used

- Flexible packaging was the most commonly used format. Carton formats were also frequently used, especially in Europe.
- Ease of use and microwavable were the top claims made on products launched.

Top Packs Launched



Top Claims Launched



—● Global N=56  
—● Europe N=30



# Innovative Asian Vegetables Launches: L3M (July-September 2013)

## NoMU Oriental Rub (Chile)

NoMU Mezcla de Especies Oriental (Oriental Rub) is a mix of spices from southeast Asia. This product can be added to duck, chicken, red meats or vegetables, or combined with honey and peanut oil to get a Asian marinade. This kosher certified seasoning is 100% natural, provides easy-cooking, and retails in 50g recyclable pack.



**Claims:**  
Ease of Use, Ethical - Environmentally Friendly Package, All Natural Product, Kosher, Ethical - Environmentally Friendly Product

## Kagome Yasai Seikatsu 100 Asian Lychee & Guava Mix Juice (Japan)

Kagome Yasai Seikatsu 100 Asian Lychee & Guava Mix Juice is available for a limited time. It combines lychee from Taiwan with fresh acidic guava from the Philippines. It contains fifteen types of vegetables and six types of fruit for a 50% vegetable juice and 50% fruit juice content.



**Claims:**  
Limited edition

## Good & Delish Chicken Potstickers (USA)

Good & Delish Chicken Potstickers are Asian style potstickers filled with vegetables and chicken. It can be easily prepared in the microwave and is said to be ready in minutes. The product is free from added MSG, artificial flavors and colours, and retails in an 8.6-oz. pack, containing eight pieces and sauce.



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

## Schwan's Asian Style Vegetable Stir Fry (USA)

Schwan's Asian Style Vegetable Stir Fry is made with grade A vegetables including, broccoli, carrots, sugar, snap peas, red peppers and water chestnuts with Asian seasoning packets. It is microwavable and said to be flash frozen to lock in freshness. This product retails in a 24-oz.



**Claims:**  
Convenient Packaging, Microwaveable



# Innovative Asian Vegetables Launches: L3M (July-September 2013)

## Seabreeze Premium Spring Rolls (Italy)

Seabreeze Premium Involtni Primavera (Spring Rolls) are a traditional Asian dish made with a pastry filled with spring vegetables as well as tropical king prawns. This product is said to be ideal for all occasions and can be oven baked in seven to eight minutes or deep fried in four to five minutes.



**Claims:**  
Premium

## Hübner Cholesterol Balance Supplement (Germany)

Hübner Cholesterin Balance (Cholesterol Balance Supplement) is made with red fermented rice and is directed to treat elevated cholesterol levels. According to the manufacturer, red fermented rice is traditionally used in Asian cuisine for its positive influence on cholesterol level.



**Claims:**  
Low/No/Reduced Lactose,  
Low/No/Reduced Allergen, Diabetic,  
Gluten-Free, Cardiovascular (Functional),  
GMO-Free

## Al Wadi Al Akhdar Asian Mixed Vegetables (Egypt)

Al Wadi Al Akhdar Asian Mixed Vegetables are said to provide all the goodness of nature in every home. This product retails in a 450g pack.



**Claims:**  
N/A

## Asia Spezialitäten Sweet & Sour Rice Dish (Germany)

Asia Spezialitäten Süß-Sauer Reisgericht (Sweet & Sour Rice Dish) is an Asian rice dish with sweet and sour sauce, vegetables and pineapples. The microwaveable product retails in a 300g pack with 150g rice and 150g sauce.



**Claims:**  
Microwaveable





# Innovative Asian Vegetables Launches: L3M (July-September 2013)

## Mei Tai Sweet & Sour Wok Stock Cubes (Germany)

Mei Tai Wok-Würfel Süß-Sauer (Sweet & Sour Wok Stock Cubes) are stock cubes for refining Asian style dishes. The product retails in a 230g pack containing 20 x 11.5g cubes.



Claims:  
N/A

## Go-Tan Asian Dinnerkit Noodles & Sweet Soy Chicken Meal Kit (Netherlands)

Go-Tan Asian Dinnerkit Noodles & Sweet Soy Chicken Meal Kit is now available. The product contains carefully selected authentic wheat stick noodles and a wok sauce to create an 'Asian restaurant style' noodle dish. It requires chicken and vegetable to be added, and retails in a 330g pack comprising 180g of noodle and 150g of sauce.



Claims:  
N/A

## Oenobiol Activateur Minceur Slimness Activator Supplement (Germany)

Oenobiol Activateur Minceur Aide À Perdre du Poids (Slimness Activator Supplement) is claimed to target extra-kilograms, and therefore to help lose weight in the limits of a controlled calorie intake. For that purpose, it's claimed to provide glucomannan from konjac of vegetable origin. This active ingredient is claimed have been scientifically tested.



Claims:  
Botanical/Herbal, Other (Functional),  
Slimming

## Itoham Asian Deli Thai- Style Green Curry Mix (Japan)

Itoham Asian Deli ThaiFu Green Curry No Moto (Thai-Style Green Curry Mix) is a sauce mix for making authentic Thai-style spicy green curry. It contains minced chicken, bamboo shoot, and mushrooms, and one simply needs to add eggplant and green pepper. The product retails in a 90g pack.



Claims:  
Ease of use



# Australian Asian Vegetables Launches: L3M (July-September 2013)

## Woolworths Select Asian Thai Red Curry Instant Soup

Woolworths Select Asian Thai Red Curry Instant Soup with noodles is said to be the perfect satisfying snack for any-time of the day. The soup is 98% fat free, packed full of flavour and quick and easy to prepare. It contains no added MSG, artificial colours or flavours. This product retails in a 60g recyclable pack providing two servings.



### Claims:

No Additives/Preservatives, Ethical - Environmentally Friendly Package, Low/No/Reduced Fat, Time/Speed, Ease of Use, Premium

## Woolworths Select Asian Laksa Instant Soup

Woolworths Select Asian Laksa Instant Soup is quick and easy to prepare. This 98% fat free product has no added MSG and contains no artificial colours or flavours. To prepare, just add boiling water. It is said to be the perfect satisfying snack for anytime of the day. The product retails in a 65g recyclable pack, containing 2 packs x 32.5g



### Claims:

No Additives/Preservatives, Ethical - Environmentally Friendly Package, Low/No/Reduced Fat, Time/Speed, Slimming, Ease of Use, Premium, High Satety



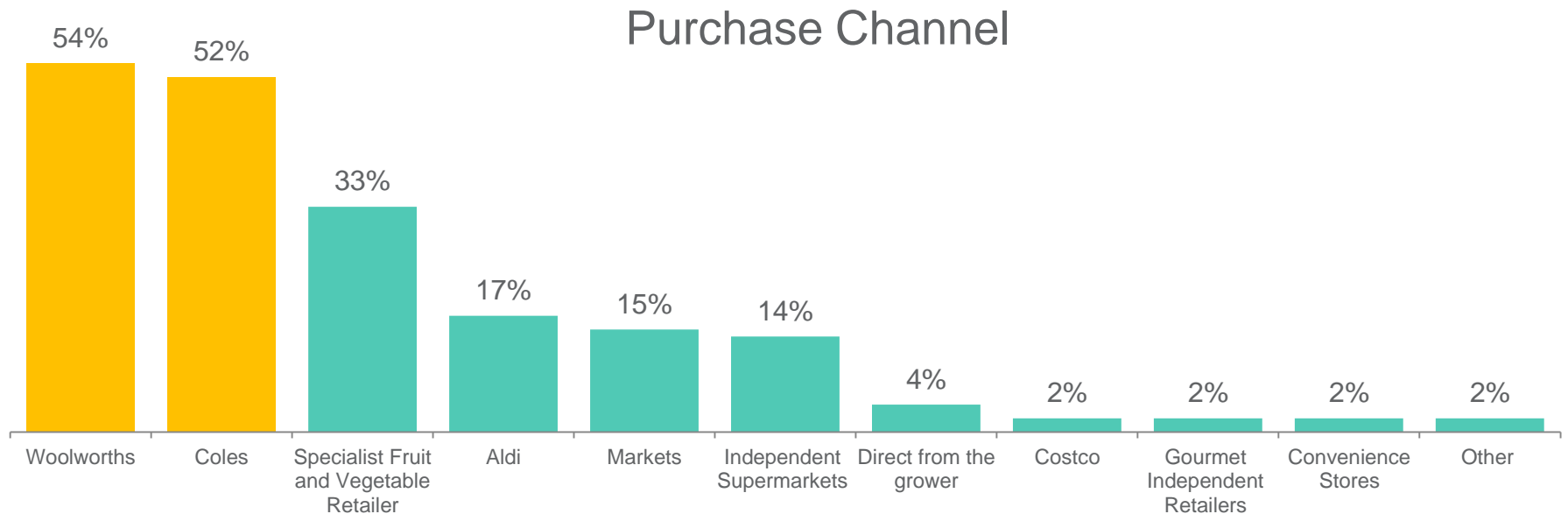
Baby  
Spinach.

# Purchase and Consumption Behaviour

## Baby Spinach



- On average, respondents purchase baby spinach once a week, and consume it twice a week.
- Baby spinach is most commonly purchased at mainstream retailers (Woolworths and Coles).



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

# ➤➤➤ Average Spend & Price Sensitivity

## Baby Spinach



⇒ The average consumer typically purchased **400g** of Baby spinach.



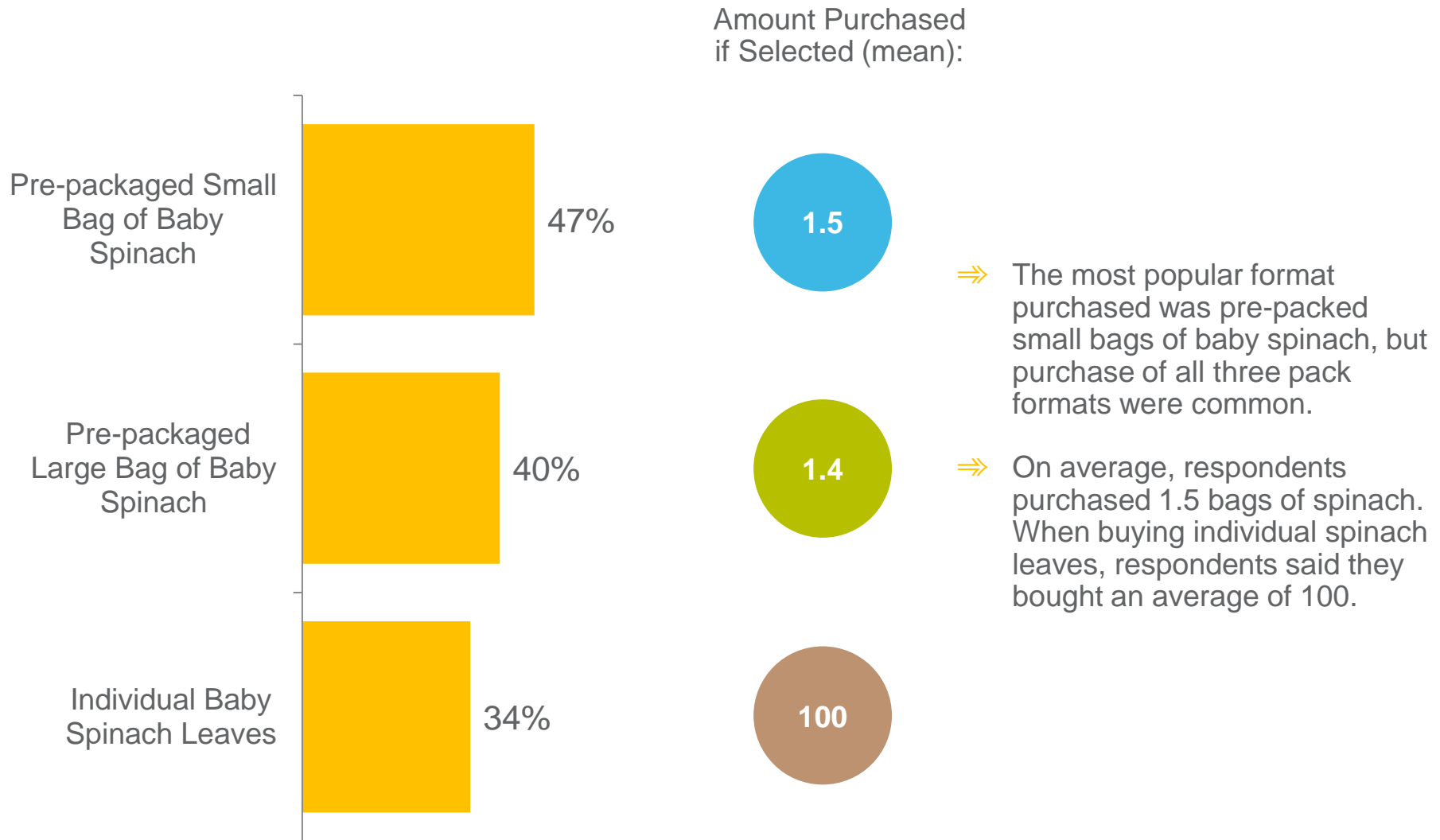
⇒ The average recalled last spend on Baby spinach was **\$3.80**



⇒ Consumers perceived the average price for Baby spinach as fairly good value for money **(6.1/10)**.

# ⇒⇒⇒ Pack Formats Purchased

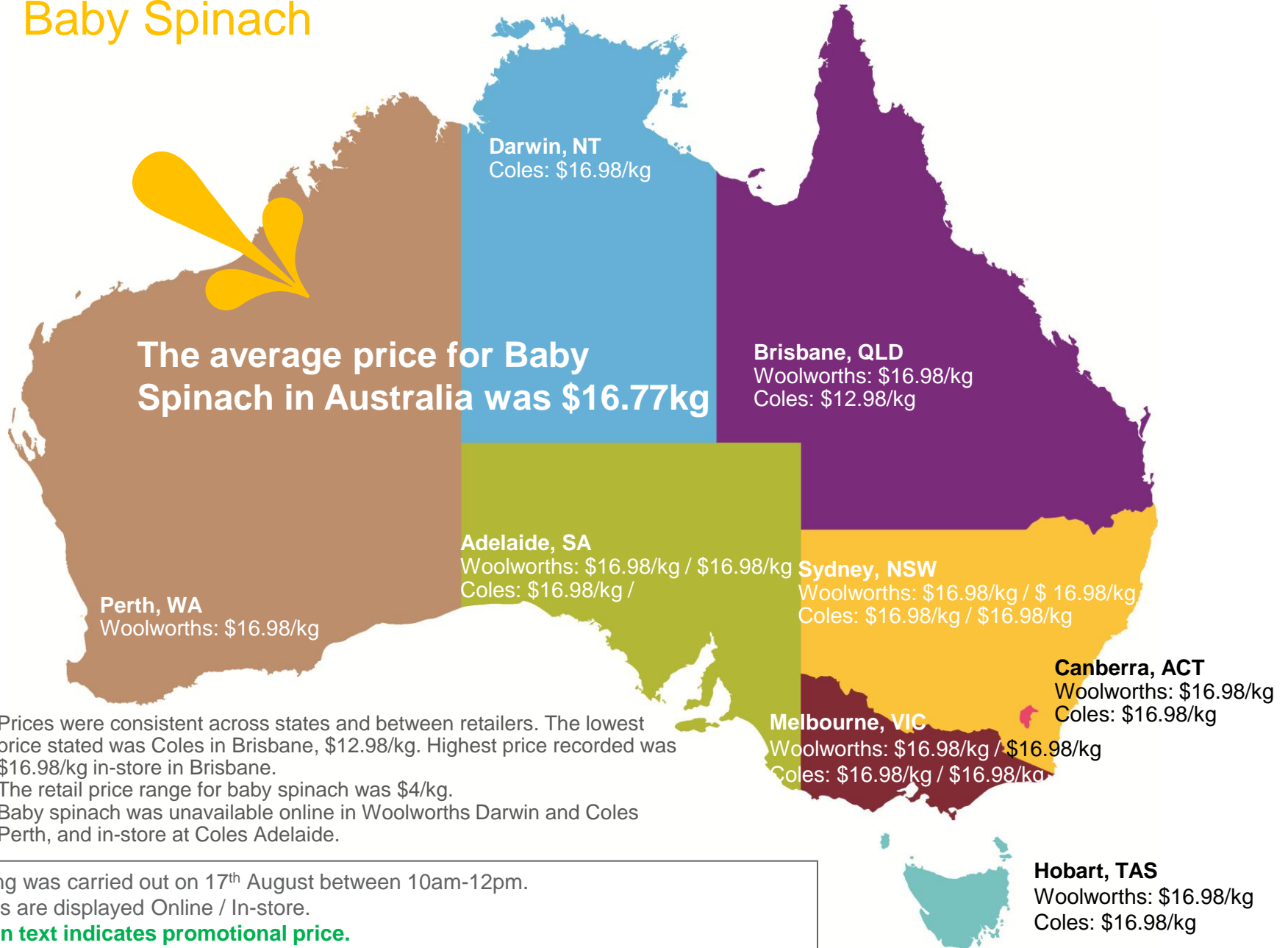
## Baby Spinach





# Online and In-store Commodity Prices

## Baby Spinach





# Spontaneous Awareness & Purchase

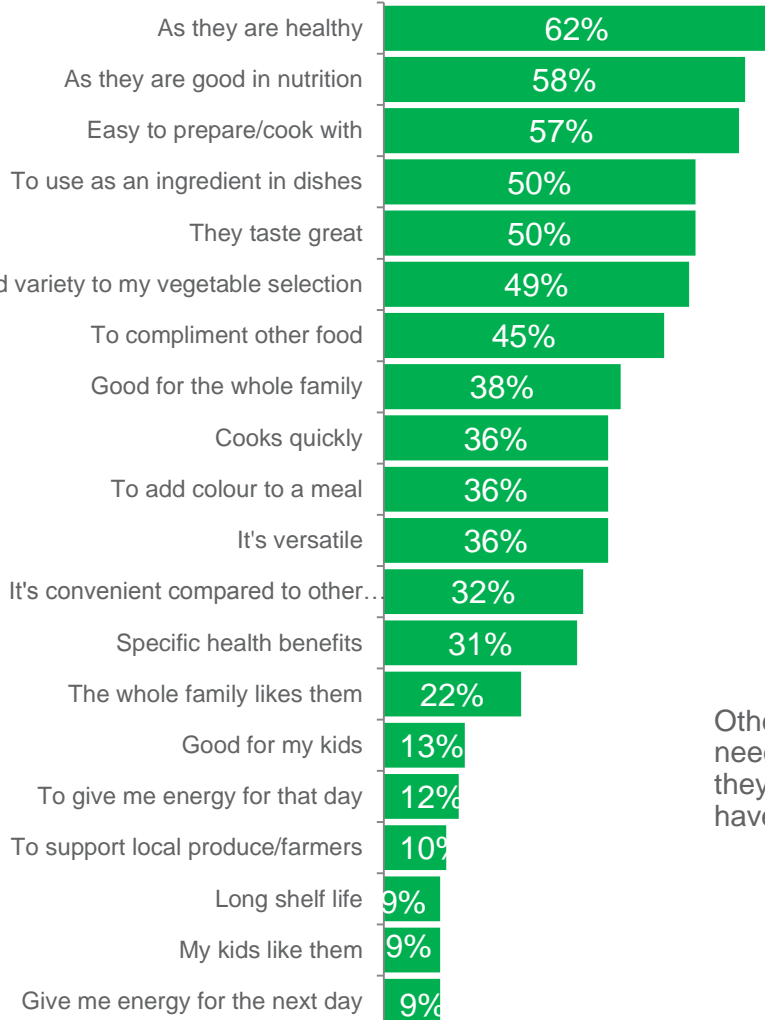
## Baby Spinach

- ▶ 80% of respondents could not name any types of baby spinach.
- ▶ Of those that mentioned a type, 4% said “English baby spinach”



# Triggers & Barriers to Purchase Baby Spinach

## Triggers



The main reasons for buying baby spinach are the health and nutrition benefits, and it is easy to prepare.

## Barriers



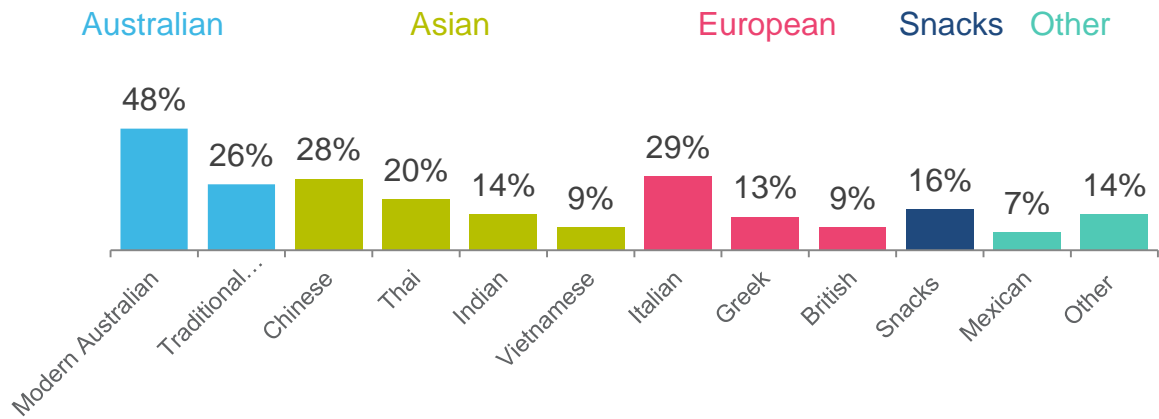
Other barriers to purchase included not needing to buy any more for the amount they currently eat, and preferring to have a variety of vegetables.

N=499  
 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?

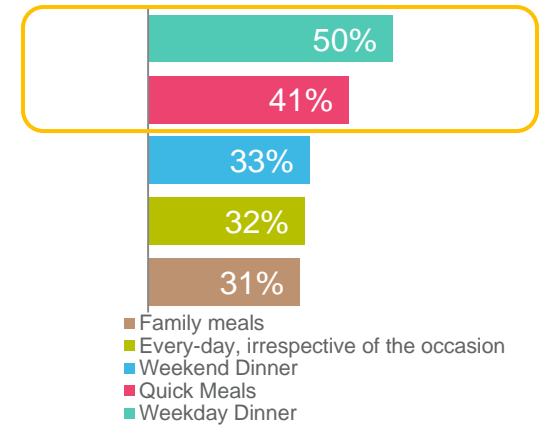
# ➤➤➤ Cooking Preferences & Occasions: **Baby Spinach**

- Consumers most commonly used baby spinach in Australian cuisines, most commonly consuming it raw.
- Baby spinach is often served accompanied by tomatoes, capsicum, carrots and red onion, which is consistent with eating baby spinach raw in a salad.
- Baby spinach is most commonly used in a weekday dinner or quick meal.

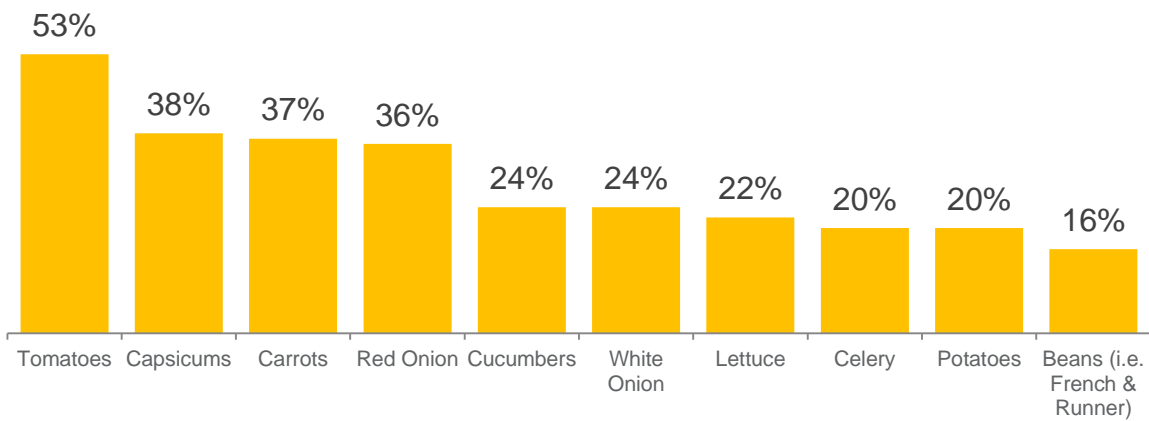
Typical Cuisine Cooked



Top 5 Consumption Occasions



Top 10 Accompanying Vegetables



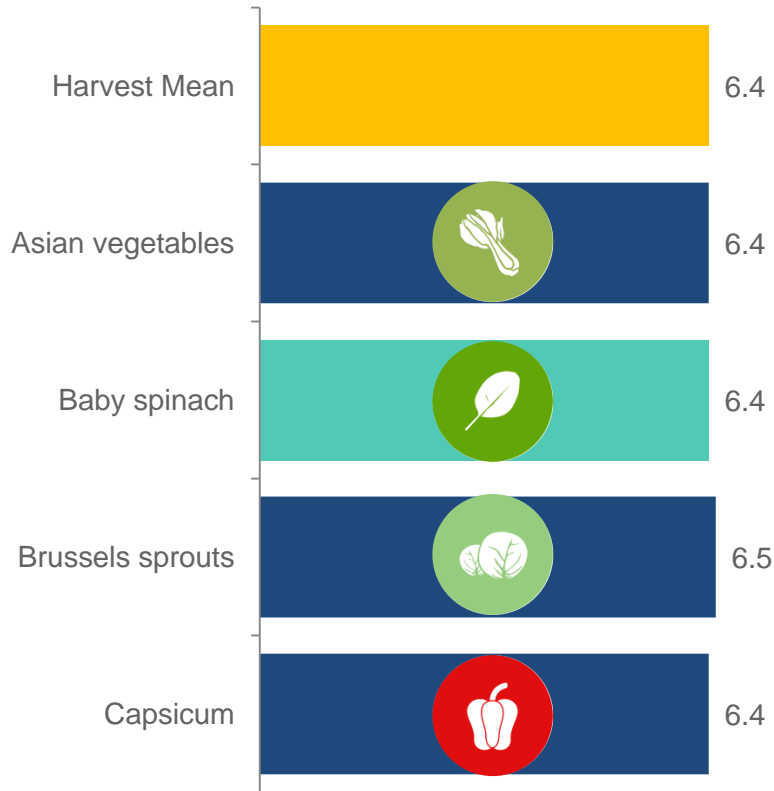
Top 10 Cooking Styles

Raw	54%
Stir frying	39%
Steaming	29%
Sautéing	15%
Soup	12%
Boiling	11%
Blanche	11%
Microwave	8%
Baking	6%
Stewing (slowcooking)	5%

N=499  
 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

⇒ The provenance of baby spinach was fairly important to consumers, on par with all commodities tracked this month.



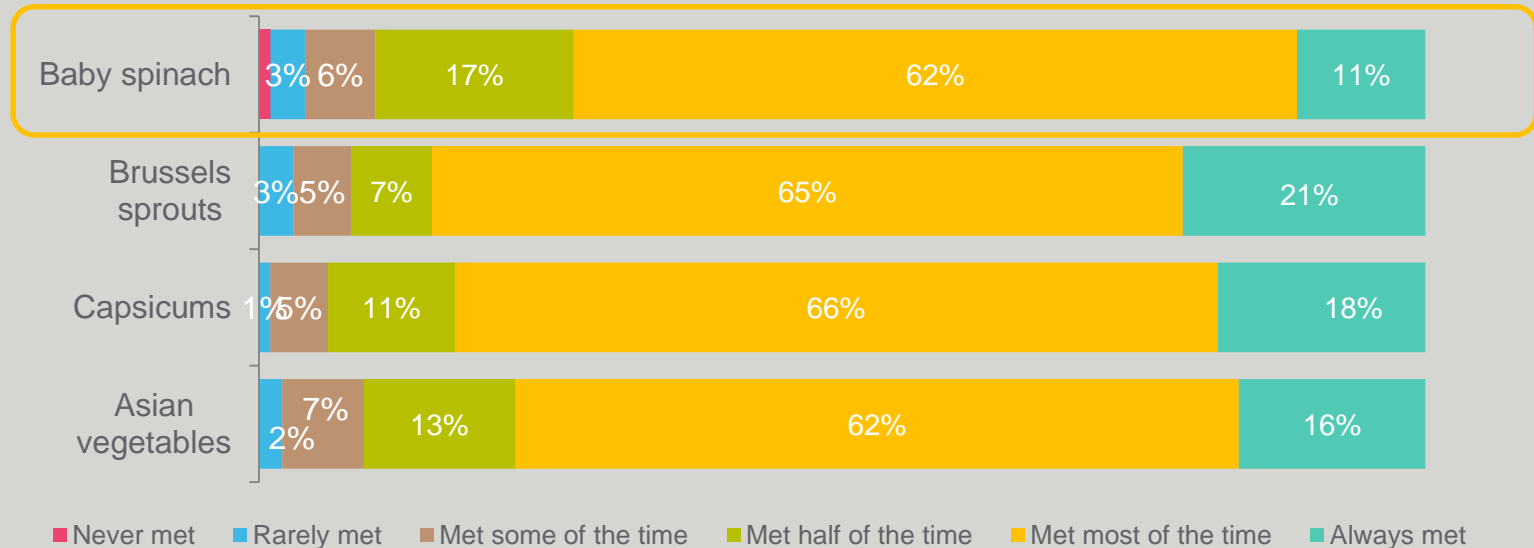
Q14. When purchasing <commodity>, how important is Provenance to you?  
Asian Vegetables N=421  
Baby Spinach N=499  
Brussel Sprouts N=319  
Capsicum N=501

# ➔➔➔ Freshness and Longevity

Expected to stay fresh for 6 days

- ➔➔➔ Respondents stated that they expected baby spinach to stay fresh for 6 days after purchase.
- ➔➔➔ Three-quarters (73%) of respondents are satisfied that their expectations are met most of the time or all the time.

## Expectations Met



N=499  
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:  
Baby  
Spinach

# Baby Spinach Global NPDs

## July-September 2013

69 baby spinach products were launched globally over the last 3 months. The majority of these launches occurred in Europe and Asia Pacific. Top categories launched were for baby foods, meals and fruits & vegetables.





## Baby Spinach Product Launches: Last 3 Months (July-September 2013) Summary

- There were 69 global baby spinach products launched over the last 3 months. In Australia there were 8 products, 7 of which were baby food.
- The majority of launches occurred in Europe (38%), and Asia Pacific (36%).
- 42% of pack formats over the last 3 months were flexible packaging, and 17% were in a tray.
- Top categories were launched in baby food (42%), meals (29%) and fruits & vegetables (19%).
- Core claims used were for babies and toddlers (46%) and no additives or preservatives (29%).
- The most innovative baby spinach products launched were Plum Organics Baby Super Greens Spinach and Apple Flavoured Organic Super Puffs and Plum Organics Little Yums Organic Teething Wafers with Spinach, Apple & Kale (examples of these can be found in the following pages).



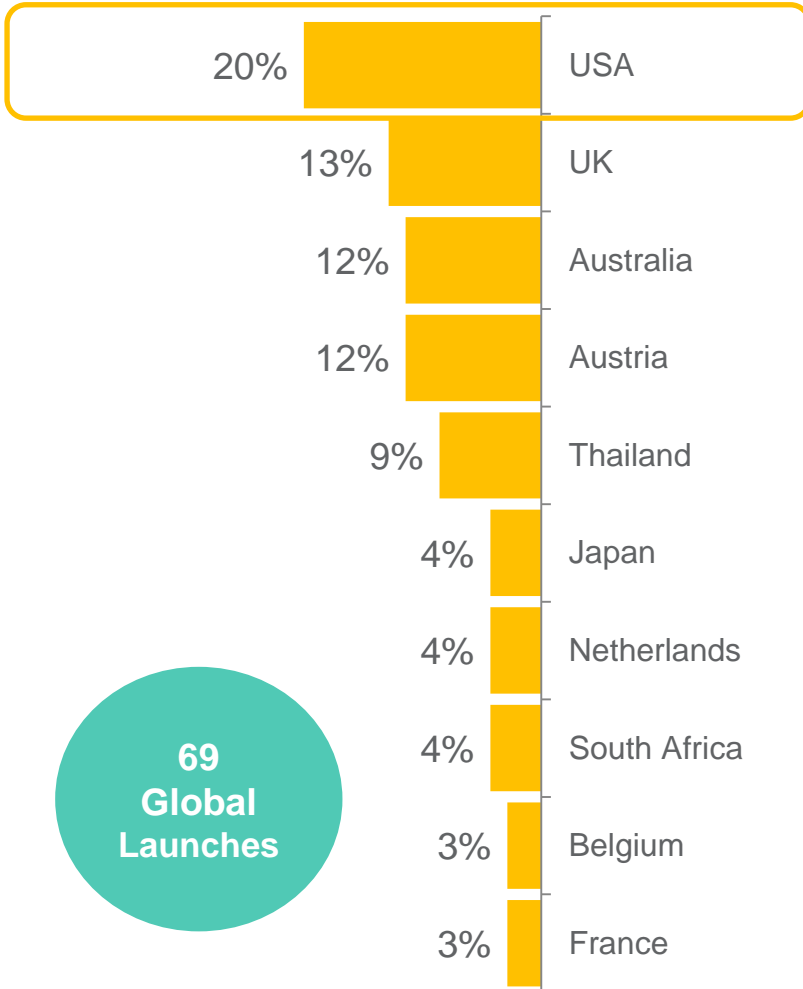
Source: Mintel (2013)

# ➤➤➤ Baby Spinach Launches

## Country, Region & Categories

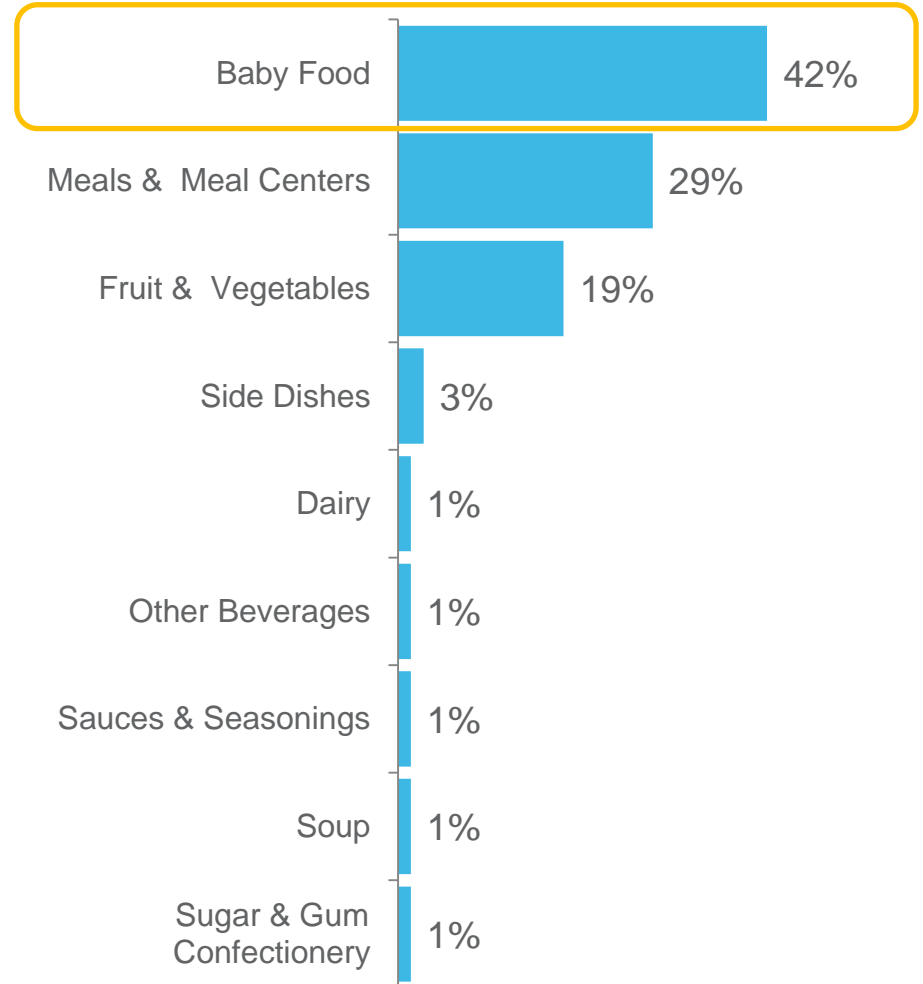
- The top launch country was USA followed by the UK, Australia and Austria.
- Top launch categories were baby food, meals and fruit & vegetables.

Top Launch Countries



69  
Global  
Launches

Top Launch Categories

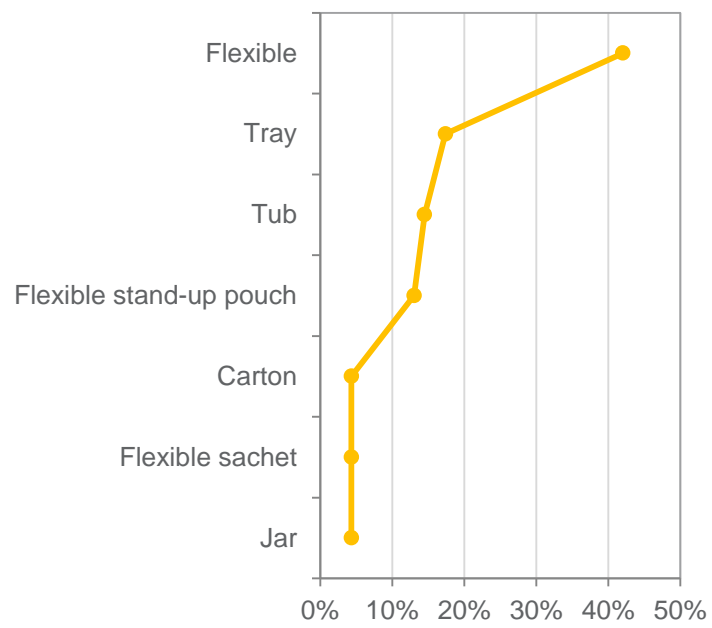


# »»» Baby Spinach Launches

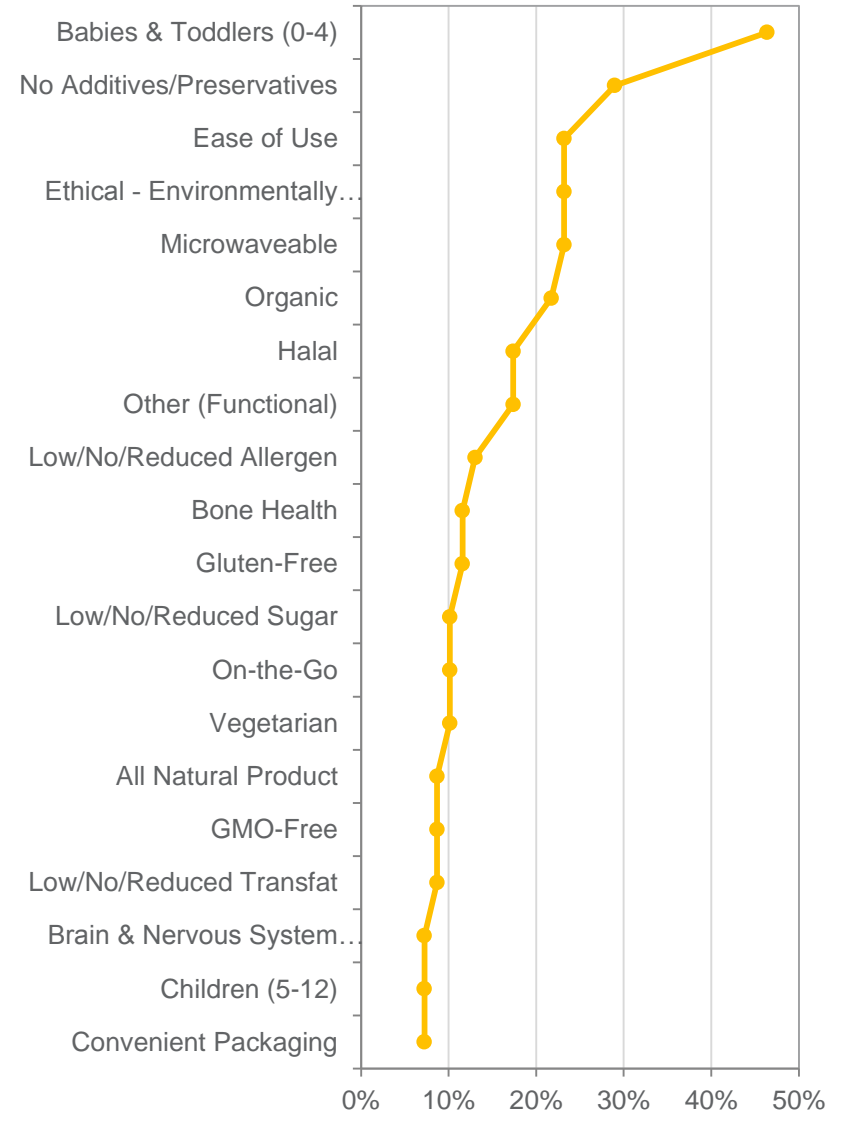
## Top Claims & Pack Formats Used

- ▶ Top pack formats were flexible and trays.
- ▶ Top claims used were for babies and toddlers, no additives or preservatives and ease of use.

Pack Formats Launched



Top Claims Launched



—● Global N=69

Number of Global Baby spinach NPDs for the L3M N=69  
Only regions >30 launches are displayed.



# Innovative Baby Spinach Launches: L3M (July-September 2013)

## Plum Organics Baby Super Greens Spinach and Apple Flavour (Hong Kong)

Plum Organics Baby Super Greens Spinach and Apple Flavoured Organic Super Puffs are fruit and veggie grain puffs that melts in the mouth made with whole grains from real organic fruits and vegetables that is said to be perfect as a snack for little fingers and great for tots too.



**Claims:**  
Convenient Packaging, Ethical - Environmentally Friendly Package, On-the-Go, Halal, Organic, Babies & Toddlers (0-4), Wholegrain

## Happy Tot Greek Yogurt with Kale, Spinach & Apple (USA)

Happy Tot Greek Yogurt with Kale, Spinach & Apple comprises creamy Greek yogurt with healthy fruit and vegetables for nutritious yumminess to help active toddlers grow big and strong. Described as an organic superfood, this product is optimally formulated and contains 3g of protein, vitamin D and is an excellent source of calcium.



**Claims:**  
Vitamin/Mineral Fortified, GMO-Free, Convenient Packaging, Kosher, On-the-Go, Organic, Social Media, Babies & Toddlers (0-4)

## Dailymonop Délicieux Salad Wrap (France)

Dailymonop Délicieux Salade Wrap (Salad Wrap) is filled with cucumber, smoked Salmon, fromage frais and dill. The product can be enjoyed as a salad or rolled, and retails in a 305g pack containing one pot of vinaigrette sauce.



**Claims:**  
N/A

## Orgain Healthy Kids Vanilla Flavoured Organic Nutrition... (USA)

Orgain Healthy Kids Vanilla Flavoured Organic Nutritional Shake has been repackaged with an updated design. The kosher certified product contains 8g of organic protein and a blend of 10 different organic fruit and vegetables.



**Claims:**  
No Additives/Preservatives, Low/No/Reduced Allergen, GMO-Free, Organic, Kosher, On-the-Go, Ease of Use, Gluten-Free, Babies & Toddlers (0-4), Children (5-12)



# Innovative Baby Spinach Launches: L3M (July-September 2013)

## Xongdur Baby Organic Sprouted Brown Rice with Banana & Spinach (Thailand)

Xongdur Baby Organic Sprouted Brown Rice with Banana & Spinach for babies aged six months up to three years. The cereal is quick to prepare as it only requires the addition of milk or water. It contains no gluten, cow's milk, nuts, soy, egg, artificial flavours, artificial colours or preservatives.



**Claims:**  
No Additives/Preservatives, Low/No/Reduced Allergen, Organic, Ease of Use, Time/Speed, Halal, Gluten-Free, Social Media, Babies & Toddlers (0-4)

## Plum Organics Little Yums Organic Teething Wafers (USA)

Plum Organics Little Yums Organic Teething Wafers with Spinach, Apple & Kale are made from wholegrain buckwheat and real fruit and veggies, and said to be the perfect first snack for little teethers. The wafer easily dissolves to encourage self-feeding for teething babies, and is made with unique fruit and vegetable combinations to delight tiny taste buds.



**Claims:**  
No Additives/Preservatives, GMO-Free, Ethical - Environmentally Friendly Package, Organic, Babies & Toddlers (0-4), Wholegrain

## Ape Man Foods Garden Blend Soup (USA)

Ape Man Foods Garden Blend Soup is raw, vegan and organic. The soup contains eggplant and bacon bits and is free from GMO, gluten and dairy. The all-natural product retails in a compostable plastic pack.



**Claims:**  
Low/No/Reduced Lactose, All Natural Product, Low/No/Reduced Allergen, GMO-Free, Gluten-Free, Vegan, Ethical - Environmentally Friendly Package, Organic, No Animal Ingredients

## SGM Aktif Presinutri Growing Up Milk with Fruit & Vegetable Flavour (Indonesia)

SGM Aktif Presinutri Susu Pertumbuhan Rasa Buah dan Sayur (Growing Up Milk with Fruit & Vegetable Flavour) is suitable for children aged three to six. It contains 19 fruit and vegetable extracts of apple, spinach, broccoli, mushroom, orange, kiwi, cabbage, squash, lemon, mango, passion fruit, honeydew, pineapple, banana, plum, pear, strawberry, tomato



**Claims:**  
Halal, Other (Functional), Babies & Toddlers (0-4), Children (5-12), Bone Health



# Innovative Baby Spinach Launches: L3M (July-September 2013)

## Picot Five Vegetables Instant Cereal (Vietnam)

Picot Five Vegetables Instant Cereal is said to be rich in vegetables and a source of nine vitamins such as vitamins A, D, C, B1, B2, B6, B12, PP, B9 and iron, which are good for children's health and overall development. The product is free from gluten, lactose, preservatives, colourants and added sugar, and is low in sodium.



**Claims:**  
Low/No/Reduced Lactose, No Additives/Preservatives, Low/No/Reduced Allergen, Other (Functional), Low/No/Reduced Sugar, Gluten-Free, Low/No/Reduced Sodium, Babies & Toddlers (0-4), Time/Speed

## Hero Friso Babychef Stewed Vegetables and Salmon (Belgium)

Hero Friso Babychef Mijoté de Légumes et Saumon (Stewed Vegetables and Salmon) is a meal for toddlers of 12 months of age or more. The gluten-free product is microwaveable and retails in an easy to open 230g pack.



**Claims:**  
Gluten-Free, Low/No/Reduced Allergen, Babies & Toddlers (0-4), Convenient Packaging, Microwaveable

## Little Pasta Organics Fun Pasta Shapes for Kids (Finland)

Little Pasta Organics Luomu Eläinkuviopasta (Fun Pasta Shapes for Kids) are now available. This product comprises organic pasta made from durum wheat semolina with tomato and spinach and contains no added salt or sugar. The vegetarian and vegan product is recommended for children from 3 years or older.



**Claims:**  
Vegan, No Animal Ingredients, Low/No/Reduced Sugar, Ease of Use, Organic, Low/No/Reduced Sodium, Vegetarian, Babies & Toddlers (0-4), Children (5-12)

## Boomerang's Spinach & Mushroom Pie (USA)

Boomerang's Spinach & Mushroom Pies are all natural pies filled with fresh baby leaf spinach mixed with mushrooms, red bell peppers and Monterey jack cheese combined in a vegetarian supreme sauce. This microwaveable product is free from preservatives, antibiotics, hormones, MSG, artificial colors and flavors, and trans fats.



**Claims:**  
No Additives/Preservatives, All Natural Product, Social Media, Hormone Free, Microwaveable, Ease of Use, Low/No/Reduced Transfat, Vegetarian





# Australian Baby Spinach Launches: L3M (July-September 2013)

## Coles Vegie Vitality Salad Kit with Sticky Balsamic Dressing

Coles Vegie Vitality Salad Kit with Sticky Balsamic Dressing is ready to mix and serve. This salad is specially blended to provide a source of vitamins A and C and is a good source of folate and omega-3. The Australian product contains no artificial colours and flavours, and retails in a 175g pack.



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

## Ella's Kitchen Oh So Creamy Chicken + Sweetcorn Mash

Ella's Kitchen Oh So Creamy Chicken + Sweetcorn Mash with herb sprinkles is organic certified, and contains no concentrates, juices, added sugar, salt, additives, thickeners or GM. It is aimed at babies from seven months old and retails in a 130g pack.



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

## Rafferty's Garden Just Veggies Parsnip, Carrot and Butternut Squash

Rafferty's Garden Just Veggies Parsnip, Carrot and Butternut Squash Meal is great for home, out-and-about or travelling. The product is said to offer premium goodness with no added salt, sugar, artificial colour, additives and GM ingredients, and is suitable for babies from four months onwards.



**Claims:**  
Low/No/Reduced Lactose, No Additives/Preservatives, Low/No/Reduced Allergen, On-the-Go, Low/No/Reduced Sugar, Microwaveable, Halal, Gluten-Free, Low/No/Reduced Sodium, Babies & Toddlers (0-4), Premium

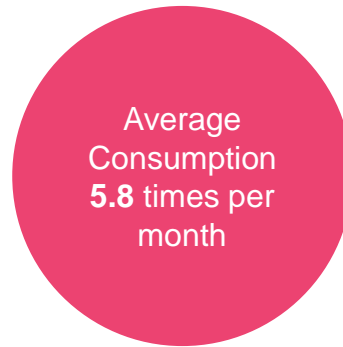


A close-up photograph of numerous fresh Brussels sprouts, showing their characteristic rounded, layered green leaves and small stems. The sprouts are densely packed and fill the entire background of the slide.

# Brussels Sprouts.

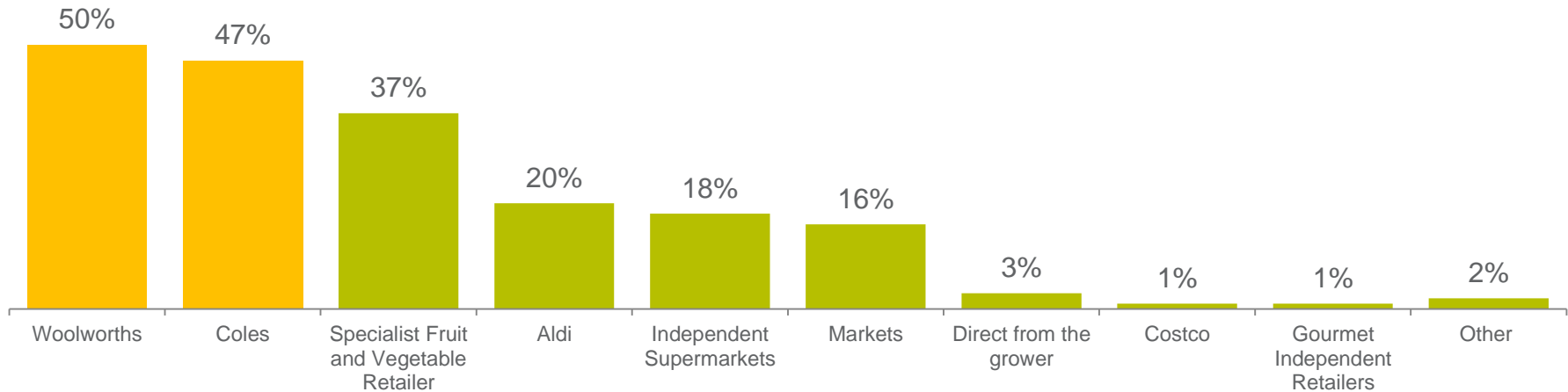
# Purchase and Consumption Behaviour

## Brussels Sprouts



- ⇒ On average, respondents purchase Brussels sprouts 3 times a month and consume them 6 times a month.
- ⇒ Brussels sprouts are most commonly purchased at mainstream retailers (Woolworths and Coles).

### Purchase Channel



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

# ⇒ Average Spend & Price Sensitivity

## Brussels Sprouts



⇒ The average consumer typically purchased **600g** of Brussels sprouts.



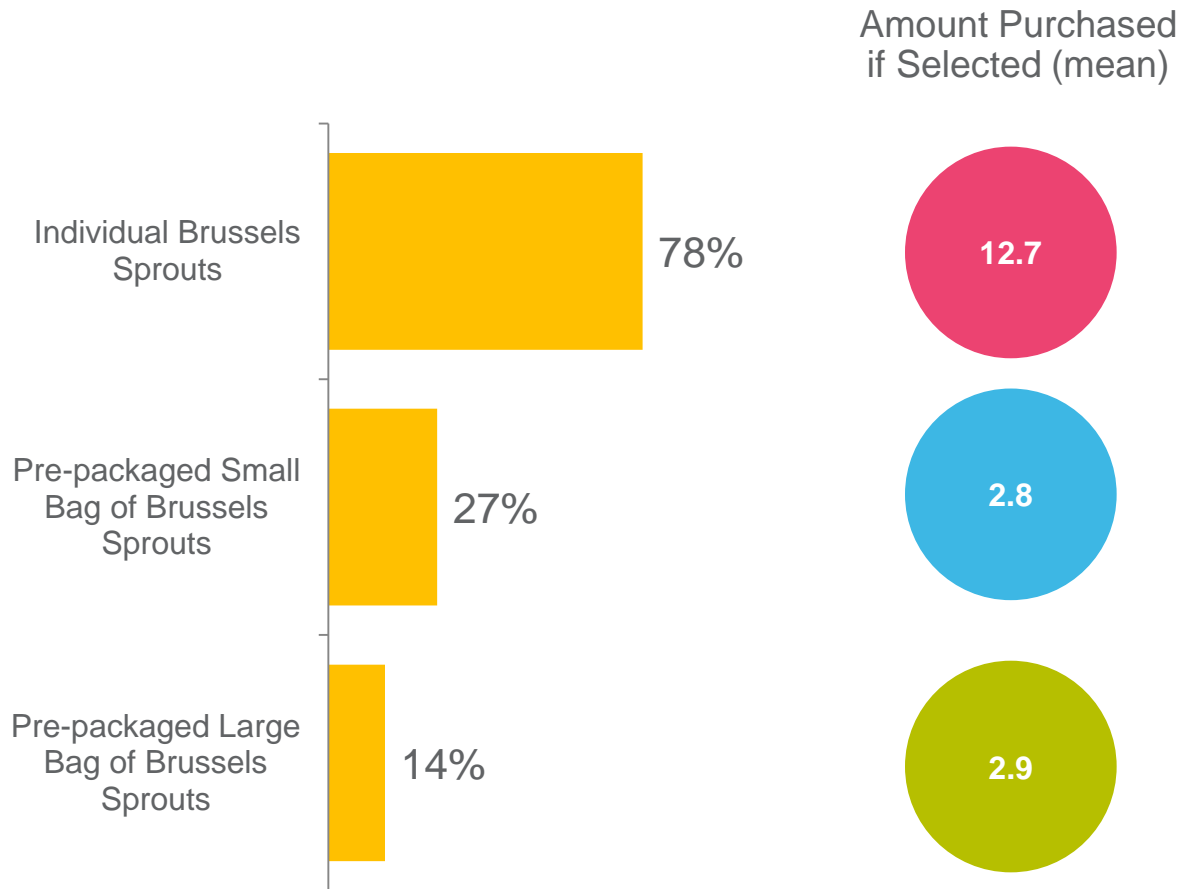
⇒ The average recalled last spend on Brussels sprouts was **\$3.61**



⇒ Consumers perceived the average price for Brussels sprouts as fairly good value for money (**6.5/10**).

# ⇒⇒⇒ Pack Formats Purchased

## Brussels Sprouts

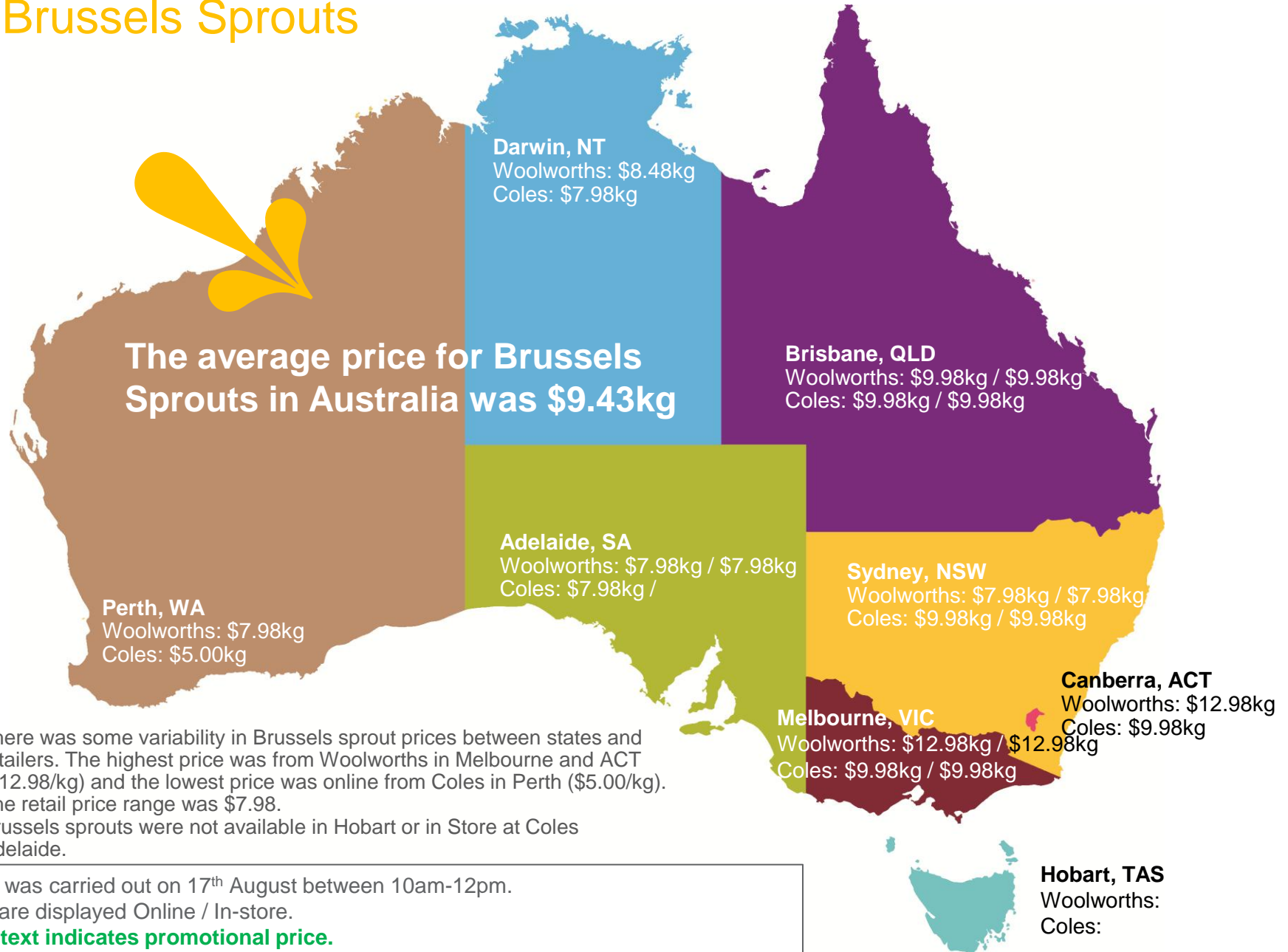


⇒⇒ The most common format purchased is individual Brussels sprouts.

⇒⇒ Respondents purchased 13 individual Brussels sprouts on average. When purchasing pre-packaged bags of Brussels sprouts, respondents bought on average 3 bags.

# Online and In-store Commodity Prices

## Brussels Sprouts





# Spontaneous Awareness & Purchase

## Brussels Sprouts

- ▶ 84% of respondents could not name any types of Brussels sprouts.

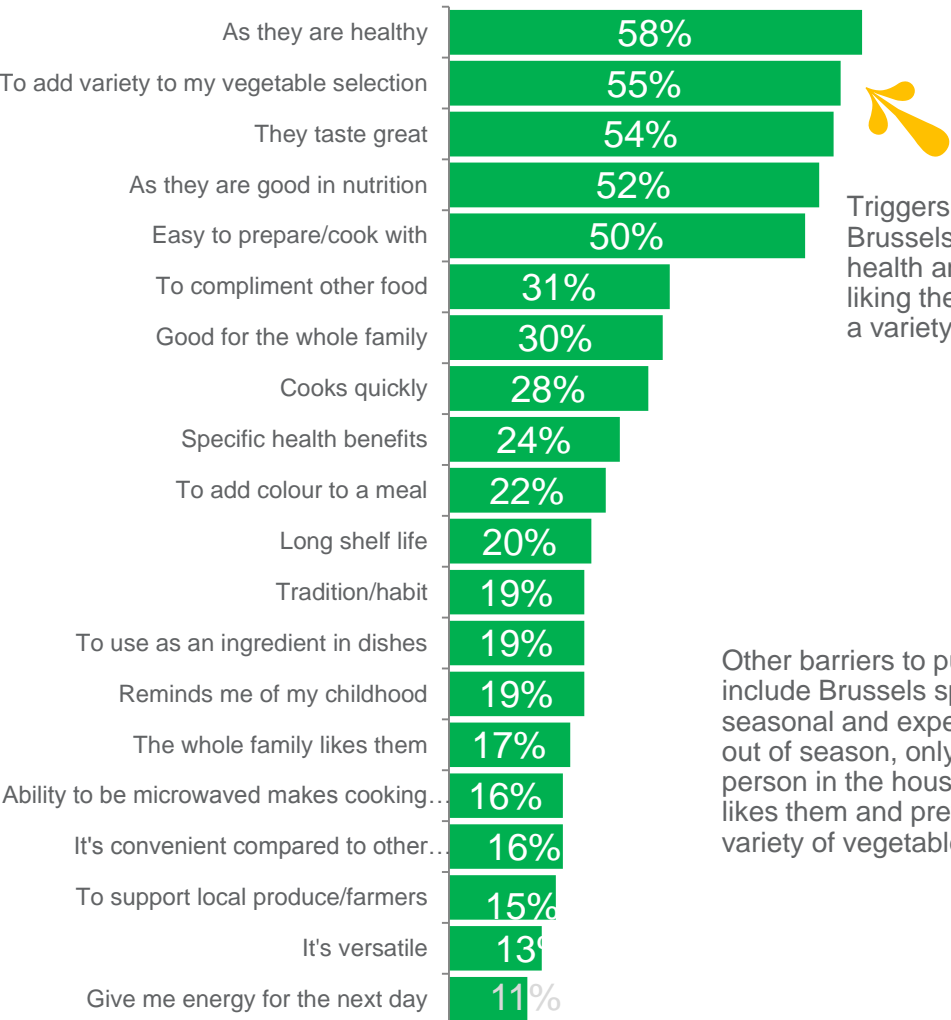




# Triggers & Barriers to Purchase

## Brussels Sprouts

### Triggers



Triggers for purchasing Brussels sprouts include health and nutrition benefits, liking the taste and to provide a variety of vegetables.

Other barriers to purchase include Brussels sprouts being seasonal and expensive when out of season, only having one person in the household who likes them and preferring a variety of vegetables.

### Barriers



N=319  
 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?

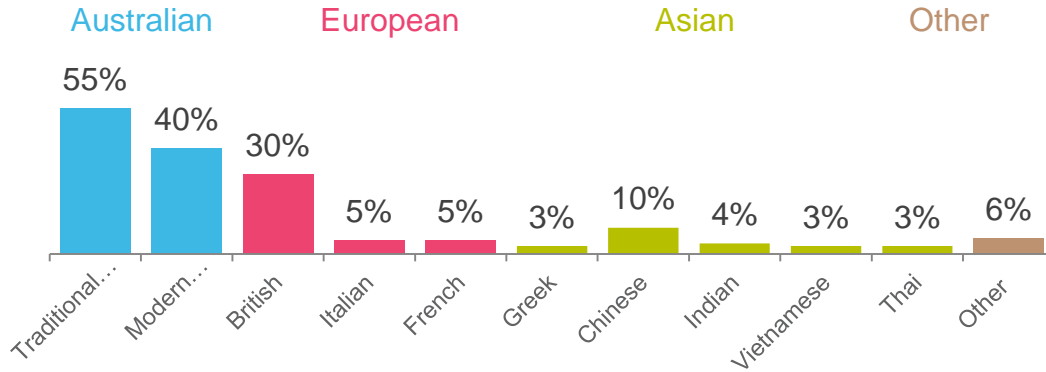




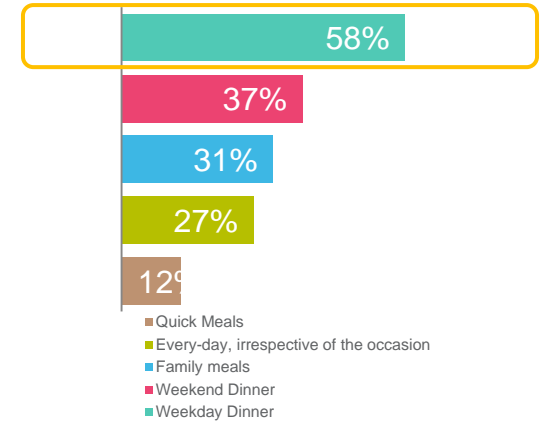
# Cooking Preferences & Occasions: Brussels Sprouts

- ⇒ Brussels sprouts are most often used in Australian and British cuisine. They are most often steamed or boiled.
- ⇒ Brussels sprouts are most often served with potatoes and carrots, fitting in with typical Traditional Australian and British cuisines.
- ⇒ Brussels sprouts are most often eaten as part of a weekday dinner.

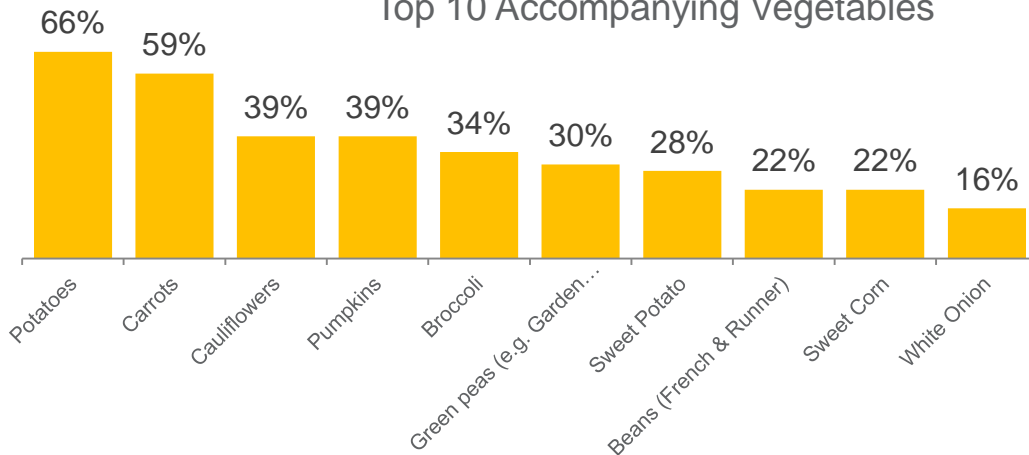
Typical Cuisine Cooked



Top 5 Consumption Occasions



Top 10 Accompanying Vegetables



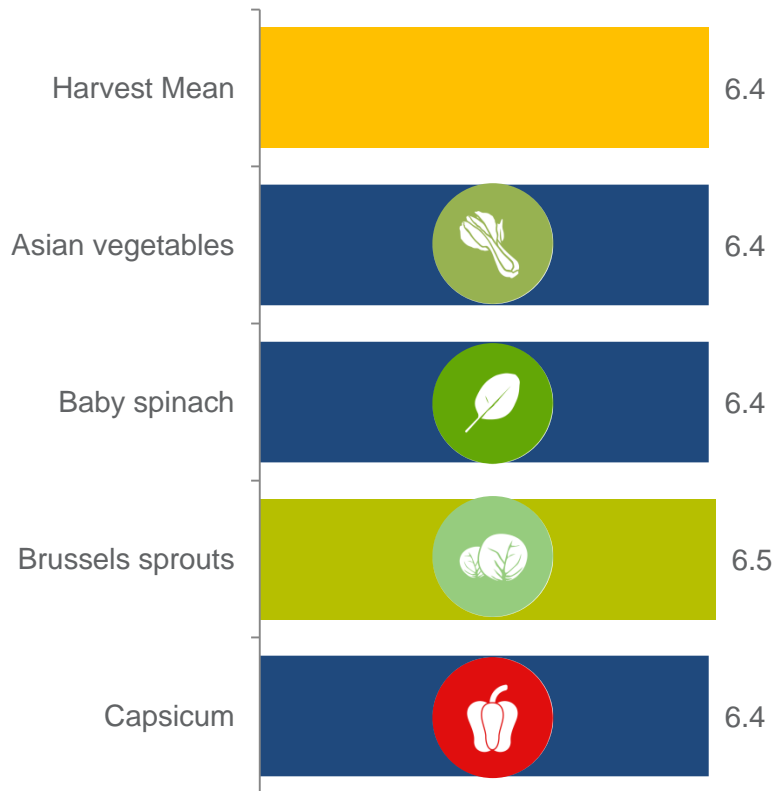
Top 10 Cooking Styles	
Steaming	57%
Boiling	41%
Microwave	22%
Stir frying	16%
Sautéing	10%
Roasting	8%
Stewing (slowcooking)	8%
Soup	8%
Blanche	7%
Baking	6%



N=319  
 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

⇒ The provenance of Brussels sprouts was fairly important to consumers, slightly higher than other commodities tracked this month.



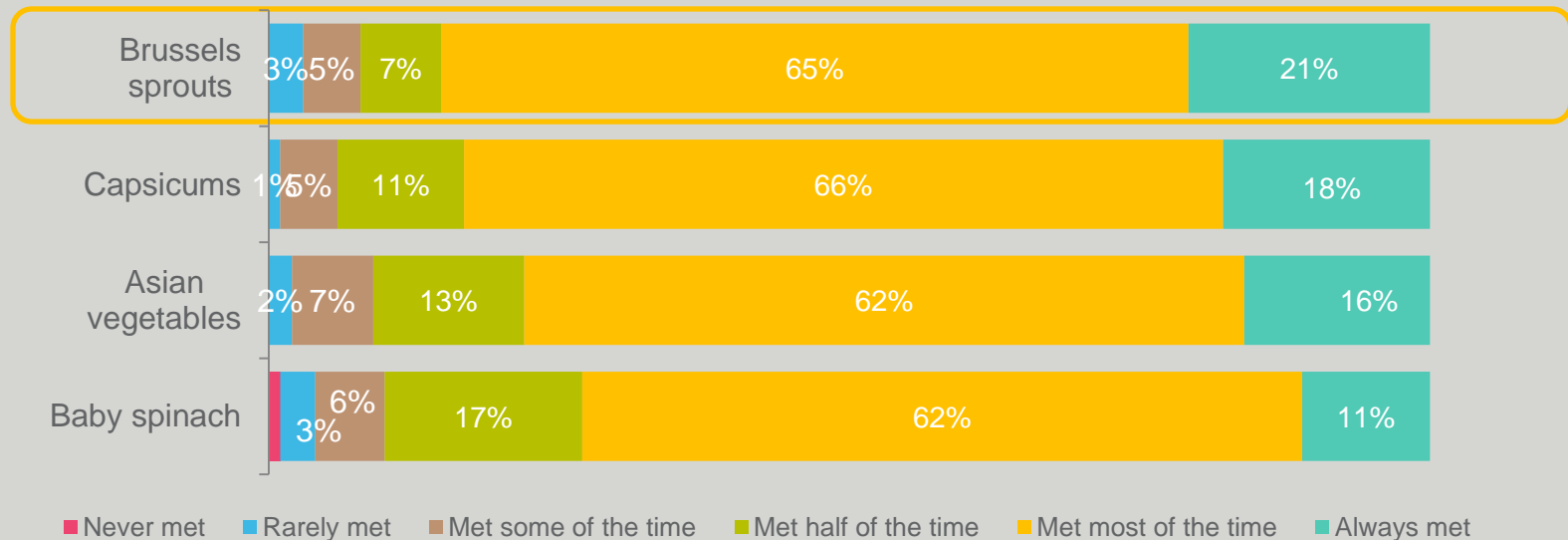
Q14. When purchasing <commodity>, how important is Provenance to you?  
Asian Vegetables N=421  
Baby Spinach N=499  
Brussel Sprouts N=319  
Capsicum N=501

# Freshness and Longevity

Expected  
to stay  
fresh for  
8 days

- ⇒ Respondents expected Brussels sprouts to stay fresh for 8 days after purchase.
- ⇒ Brussels sprouts performed best on meeting these expectations of all the commodities tracked this month, with one in five respondents saying their expectation was always met.

## Expectations Met



N=319

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> ?



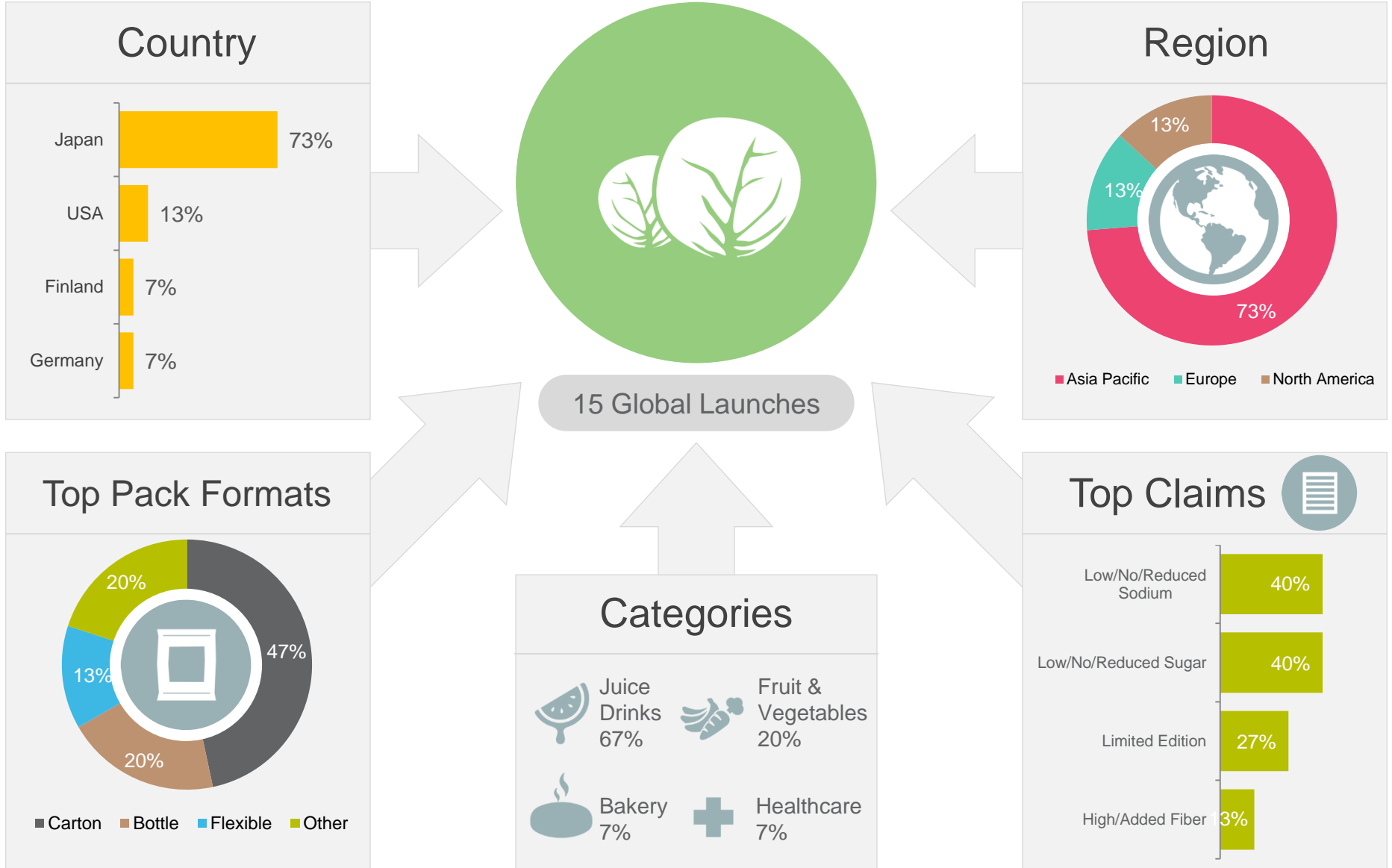
# Trends: Brussels Sprouts

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

# Brussels Sprouts Global NPDs

July– September 2013

16 Brussels Sprouts global launches occurred in the last three months. Three quarters of those launches occurred in Asia Pacific, particularly in Japan. Category launches were mainly in juices and fruit & vegetables.



## Brussels Sprouts Product Launches: Last 3 Months (July– September 2013) Summary

- 15 products were launched globally that contained Brussels sprouts as an ingredient. No products were launched in Australia.
- The majority of launches occurred in Asia Pacific (73%).
- Carton (47%) and Bottle (20%) were the most used pack formats in the last 3 months.
- Top category launches were Juices (67%) and fruit & vegetables (20%).
- The most used claims for launched products were Low sodium and Low sugar (40% each), and Limited edition (27%).
- The most innovative launches were Ajiwai Famima Café Daily Required Green & Yellow Vegetable Drinking Yoghurt and MHP Activite Sport Enzyme-Activated Multivitamin Dietary Supplements (example of these can be found in the following pages).



Source: Mintel (2013)



# Innovative Brussels Sprouts Launches: L3M (July– September 2013)

## Ajiwai Famima Café Daily Required Green & Yellow Vegetable Drinking Yoghurt (Japan)

Ajiwai Famima Café 1nichibun No Ryokuou Yasai + Nomu Yogurt (Daily Required Green & Yellow Vegetables Drinking Yogurt) combines green and yellow vegetables with yogurt. It is claimed to provide the daily required amount of calcium. The product retails in a 200g cup.



Claims:  
N/A

## MHP Activite Sport Enzyme-Activated Multivitamin Dietary Supplements (USA)

MHP Activite Sport Enzyme-Activated Multivitamin Dietary Supplement Tablets have been designed to help muscle growth, recovery, endurance, and energy. This supplement is claimed to be the only multivitamin clinically shown to increase free amino acid levels by 142%, increase BCAA utilization by 144% and increase exercise endurance by 143%.



Claims:  
Immune System (Functional), Botanical/Herbal, Other (Functional), Weight & Muscle Gain, Antioxidant, Energy (Functional)

## Pola 7-Color Vegetables Concentrated Mixed Juice (Japan)

Pola 7shoku Yasai No Shikisai Shibori Yasai Mix Noshuku Juice (7-Color Vegetables Concentrated Mixed Juice) is a blend of 13 types of vegetables, with 7 colours of vegetables: red, orange, yellow, green, purple, white, and black. 450g of vegetables were used per can. The product retails in a 6 x 190g pack.



Claims:  
Limited Edition

## Eismann Tender Country Vegetables (Germany)

Eismann Zartes Landgemüse (Tender Country Vegetables) are described as a traditional vegetable mix of unseasoned Parisian carrots, yellow carrots, cauliflower and Brussels sprouts. The microwaveable product retails in a 600g bag.



Claims:  
Microwaveable





# Innovative Brussels Sprouts Launches: L3M (July– September 2013)

## Kagome Yasai Ichinichi Kore Ippon Concentrated Vegetable Drink (Japan)

Kagome Yasai Ichinichi Kore Ippon Noshuku Yasai No Chikara (Concentrated Vegetable Power Drink) is a new extension to the Yasai Ichinichi Kore Ippon juice series. It is juice with a blend of 30 types of vegetables, which has a satisfying taste containing plenty of carrot pulp and dietary fiber. It is mainly targeted at men in their 40s to their 50s.



**Claims:**  
High/Added Fiber, All Natural Product

## Kirin Mutenka Yasai 48 Types of Rich Vegetables with Mild Soy Milk (Japan)

Kirin Mutenka Yasai 48shu No Koi Yasai Maroyaka Tonyu Blend (48 Types of Rich Vegetables with Mild Soy Milk) offers a blend of 48 types of vegetables and mild soy milk. No flavourings, sugar or sodium was added. The soy milk gives it a mild taste. The product retails in a 1000ml pack.



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

## Ito En Jujitsu Yasai Green Vegetable Juice Mix (Japan)

Ito En Jujitsu Yasai Midori No Yasai Mix (Green Vegetable Juice Mix) is a green vegetable and apple-based juice blending 21 types of vegetable and 4 types of fruit. No sodium or sugar was added. .



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

## Kagome Yasai Ichinichi Kore Ippon Concentrated Jelly Vegetable Juice (Japan)

Kagome Yasai Ichinichi Kore Ippon Cho Noshuku Jelly (Concentrated Jelly Vegetable Juice) has been relaunched. It is made with 350g of vegetables per 100g. This product not only provides the daily required amount of vegetables (30 varieties of vegetables), but also includes high amounts of "petit verts" (leafy greens) and kale



**Claims:**  
Other (Functional), Low/No/Reduced Sodium, Low/No/Reduced Sugar, Low/No/Reduced Calorie



# Innovative Brussels Sprouts Launches: L3M (July– September 2013)

## Findus Uuni- Ja Grillikasvikset Herbal Vegetables (Finland)

Findus Uuni- Ja Grillikasvikset Yrttiset (Herbal Vegetables for Oven and Grill) are fibre rich vegetables that require 20 minutes of cooking. This product retails in a 500g pack featuring a recipe.



**Claims:**  
High/Added Fiber

## Ito En Future Vegetable & Fruit Mix (Japan)

Ito En Poppippo Mirai Yasai Yasai & Fruit Mix (Future Vegetable & Fruit Mix) is now available in a new 500g bottle. This juice with a 30% vegetable juice content and 70% fruit juice content is based on the concept of "Mirai Yasai" (future vegetables), which appears in the promotional video for the theme song of Hatsune Miku anime series.



**Claims:**  
Low/No/Reduced Sodium, Limited Edition, Low/No/Reduced Sugar

## Kagome Yasai Seikatsu 100 Kisetsu Gentei Okinawa Shikuwasa Mix (Japan)

Kagome Yasai Seikatsu 100 Kisetsu Gentei Okinawa Shikuwasa Mix (Okinawa Hiram Lemon Mix Juice) has been relaunched for a limited period of time with a new 200ml pack and a new formulation now comprising passion fruit juice. This seasonal product consists of a blend of fruits from Okinawa (hirami lemon, acerola, citrus tankan, and bitter gourd).



**Claims:**  
Seasonal, Limited Edition

## Kagome Yasai Ichinichi Kore Ippon Concentrated Iron Vegetable Juice (Japan)

Kagome Yasai Ichinichi Kore Ippon Noshuku Tappuri Tetsubun (Concentrated Iron Vegetable Juice) has been created using the daily required amount of vegetables (350g) per pack. It contains 30 types of vegetables and is rich in vitamins and minerals, and it includes plenty of spinach which is rich in iron, thus one pack contains 1.2mg of iron.



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

A large, vibrant photograph of various bell peppers in shades of red, yellow, and green, arranged in a dense pattern. A large, semi-transparent grey circle is overlaid in the center of the image.

Capsicums.

# Purchase and Consumption Behaviour

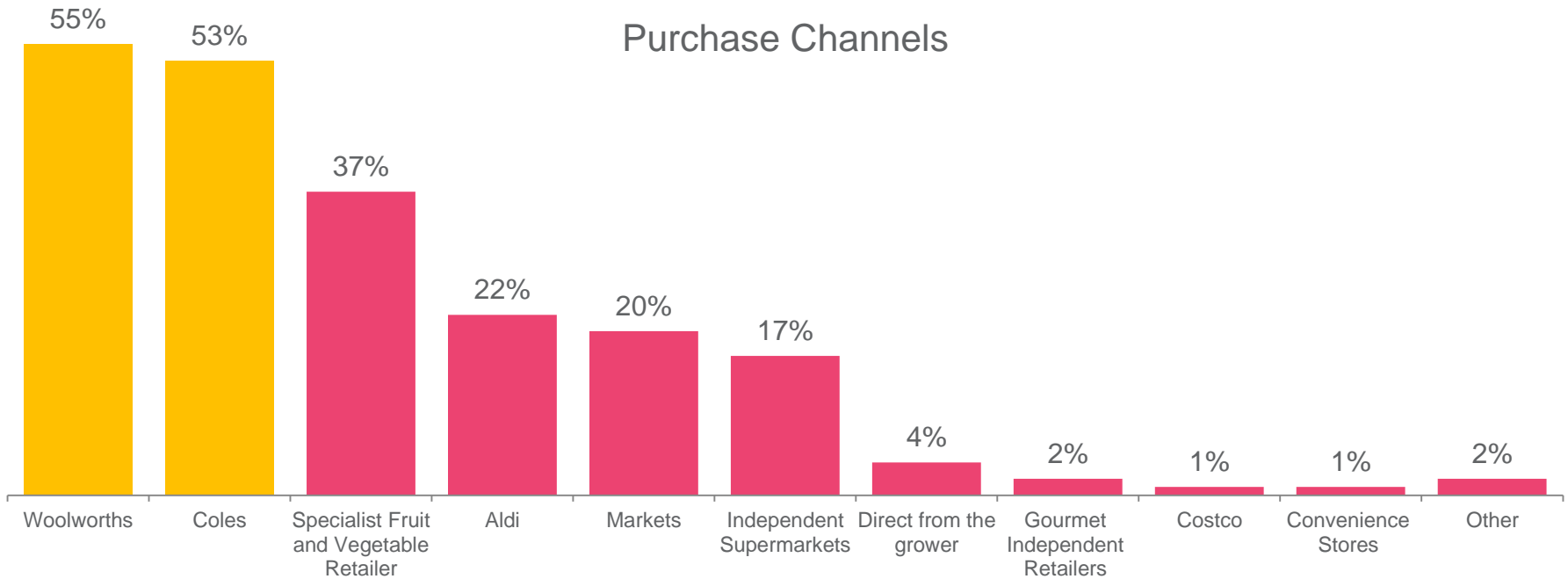
## Capsicums

Average Purchase  
4.4 times per month

Average Consumption  
10.3 times per month

- ⇒ On average, respondents bought capsicums once a week and consumed them more than twice a week.
- ⇒ Capsicums are most commonly purchased at mainstream retailers (Woolworths and Coles).

### 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 N=501

# ⇒ Average Spend & Price Sensitivity

## Capsicums



⇒ The average consumer typically purchases **700g** of Capsicum.



⇒ The average recalled last spend on Capsicum was **\$3.89**.



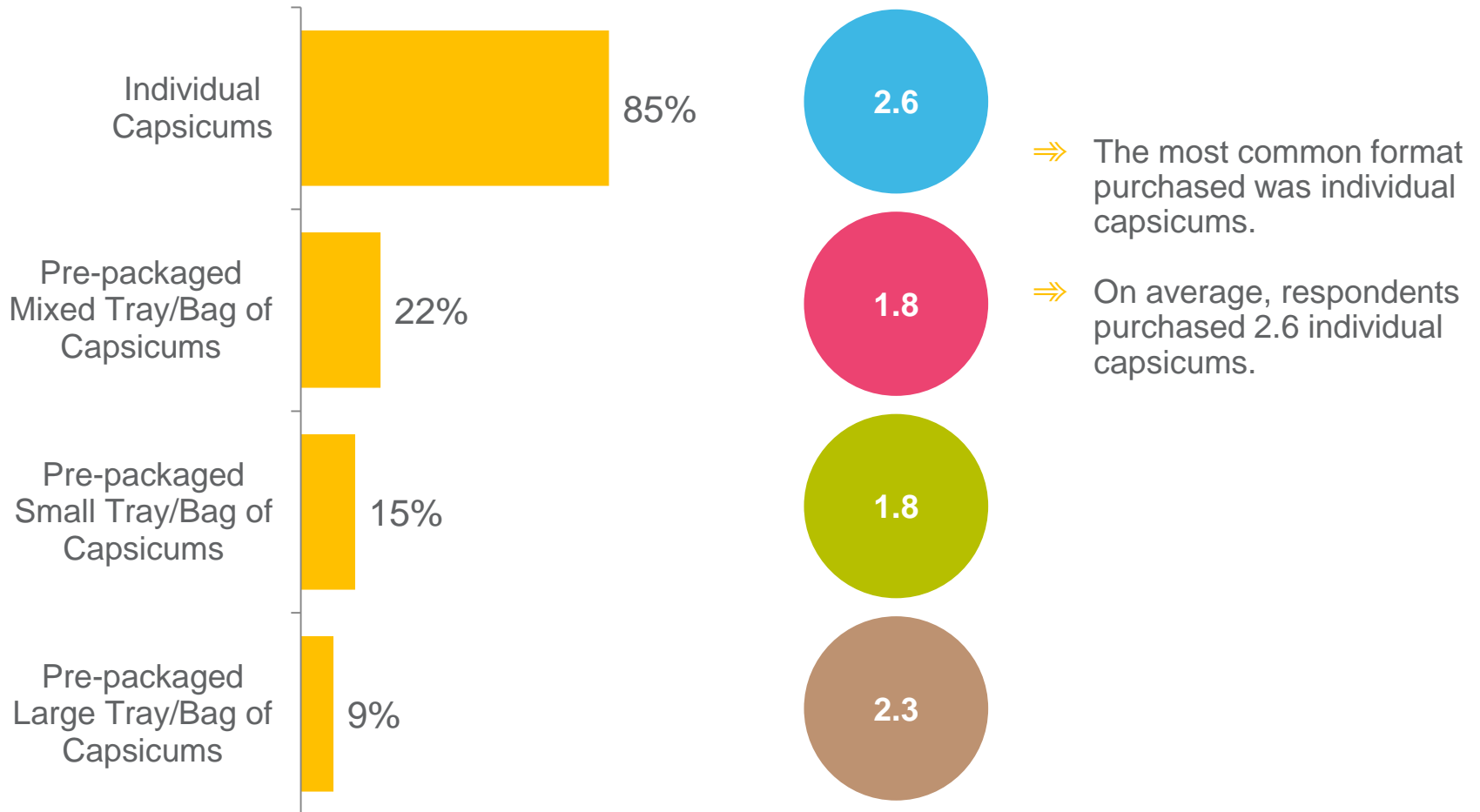
⇒ Consumers perceived the average price for Capsicum as fairly good value for money (**6.3/10**).



# ⇒⇒⇒ Pack Formats Purchased

## Capsicums

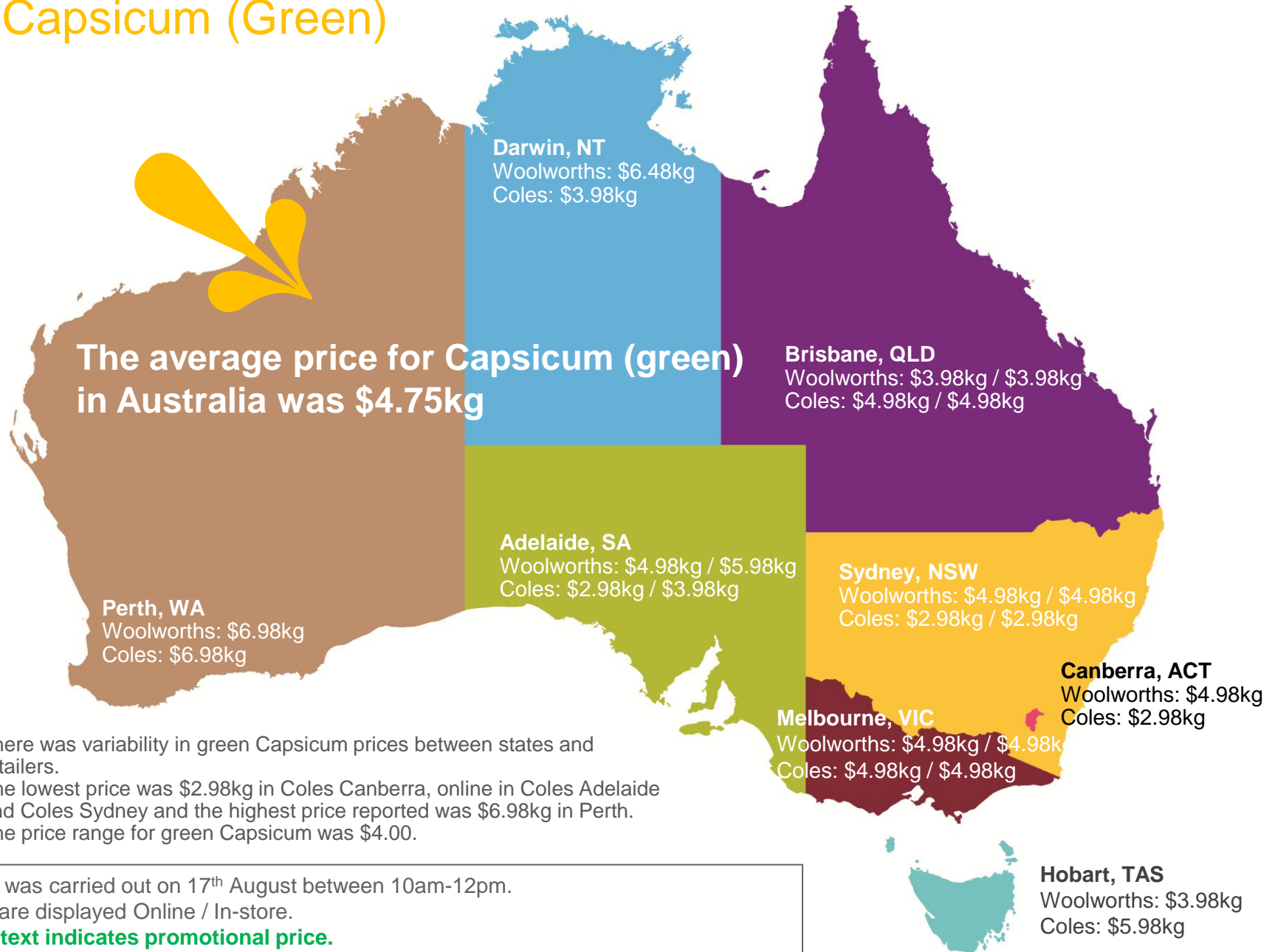
Amount Purchased  
if Selected (mean)



Q3a. How much <commodity> does this typically equate to?

# Online and In-store Commodity Prices

## Capsicum (Green)

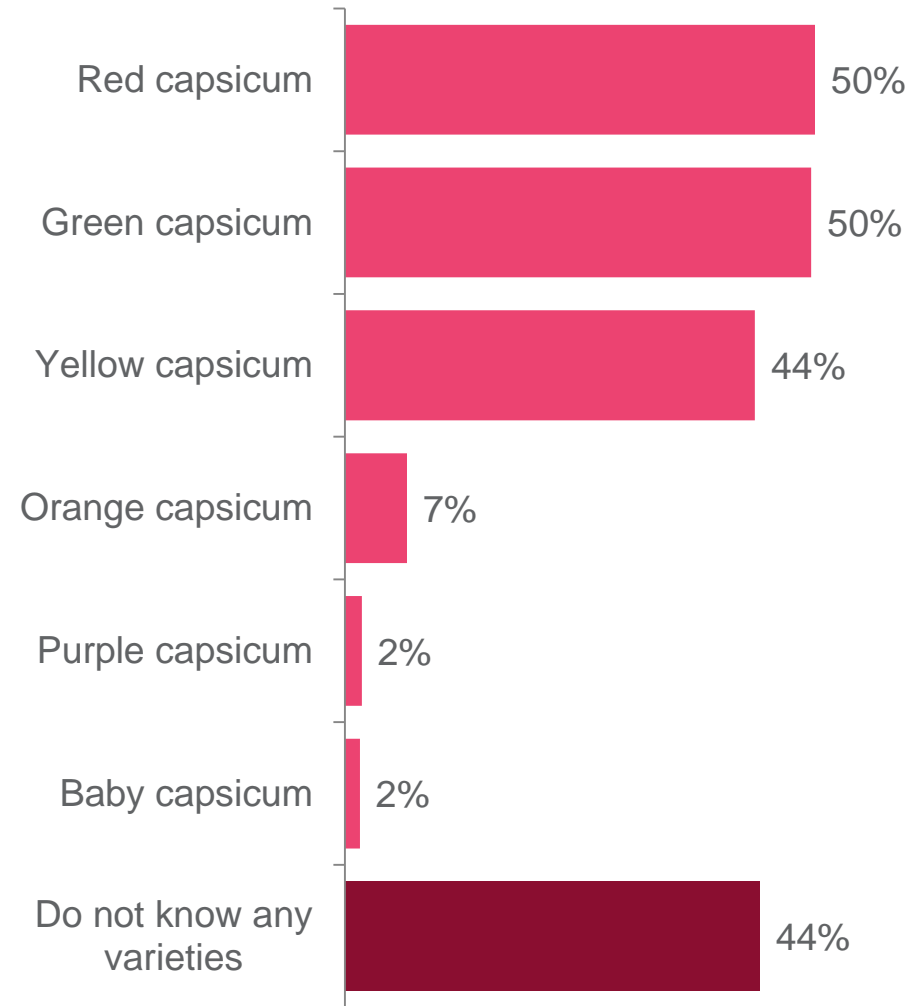




# Spontaneous Awareness & Purchase

## Capsicum

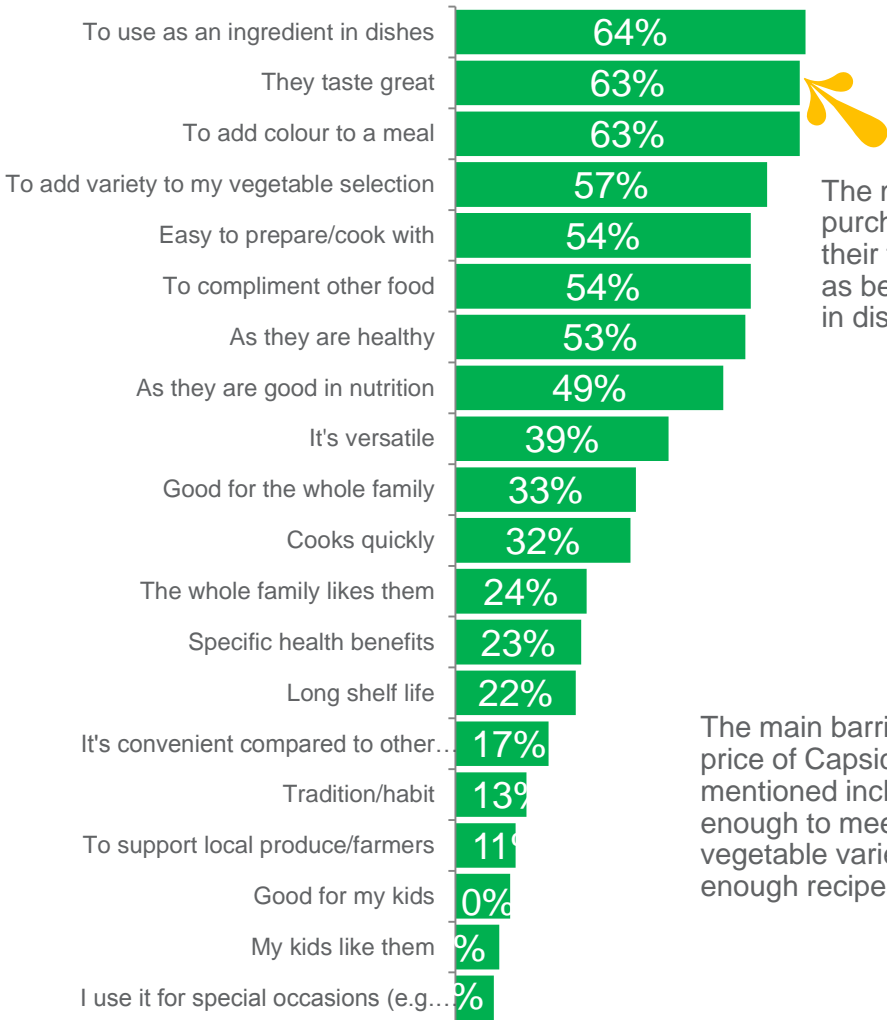
- ▶ 44% of respondents said they were not aware of any varieties of capsicum. Most respondents only mentioned colour as a differentiator
- ▶ Half of respondents were aware of coloured capsicums; red and green capsicums, and 44% mentioned yellow capsicum.



# Triggers & Barriers to Purchase

## Capsicums

### Triggers



The main triggers for purchasing capsicums are for their flavour and colour, as well as being used as an ingredient in dishes.

### Barriers



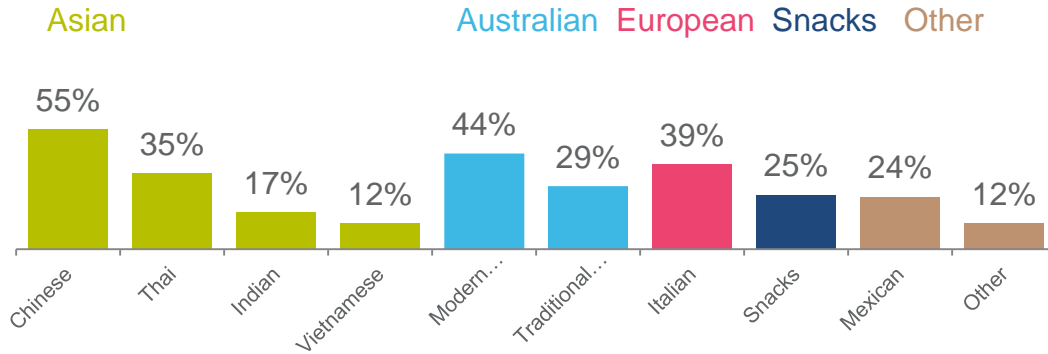
The main barrier to purchase is the price of Capsicums. Other reasons mentioned included already buying enough to meet their needs, enjoying vegetable variety and not knowing enough recipes containing capsicum.

N=501  
 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?

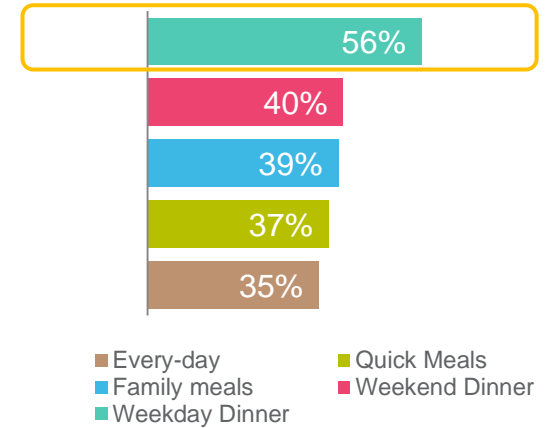
# Cooking Preferences & Occasions: Capsicums

- ⇒ Consumers most commonly used capsicums in Asian cuisines, specifically Chinese, which is reflected in the top cooking style being stir frying.
- ⇒ Asian vegetables were most commonly served with tomatoes and carrots.
- ⇒ Weekday dinners were the top consumption occasion.

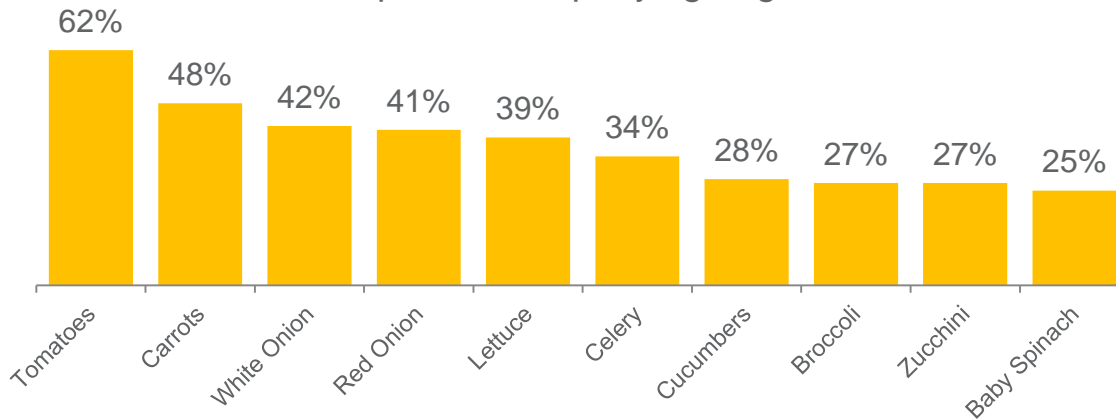
Typical Cuisine Cooked



Top 5 Consumption Occasions



Top 10 Accompanying Vegetables

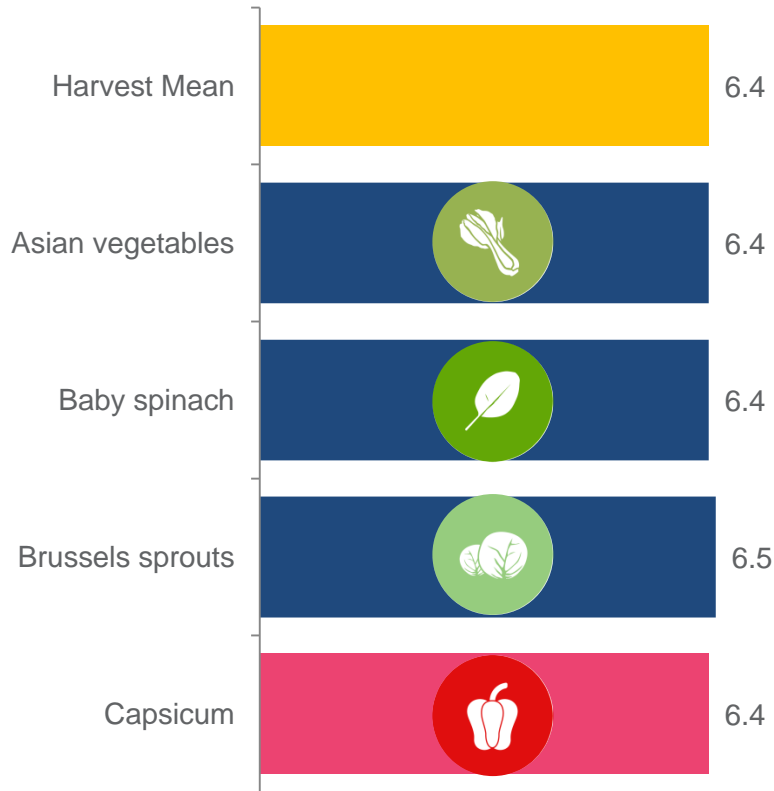


Top 10 Cooking Styles	
Stir frying	73%
Raw	58%
Roasting	32%
Stewing (slowcooking)	21%
Grilling	20%
Sautéing	19%
Soup	17%
Shallow Frying	15%
Baking	15%
Steaming	13%

N=501  
 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

⇒ The provenance of capsicums was fairly important to consumers, on par with all the commodities tracked this month.



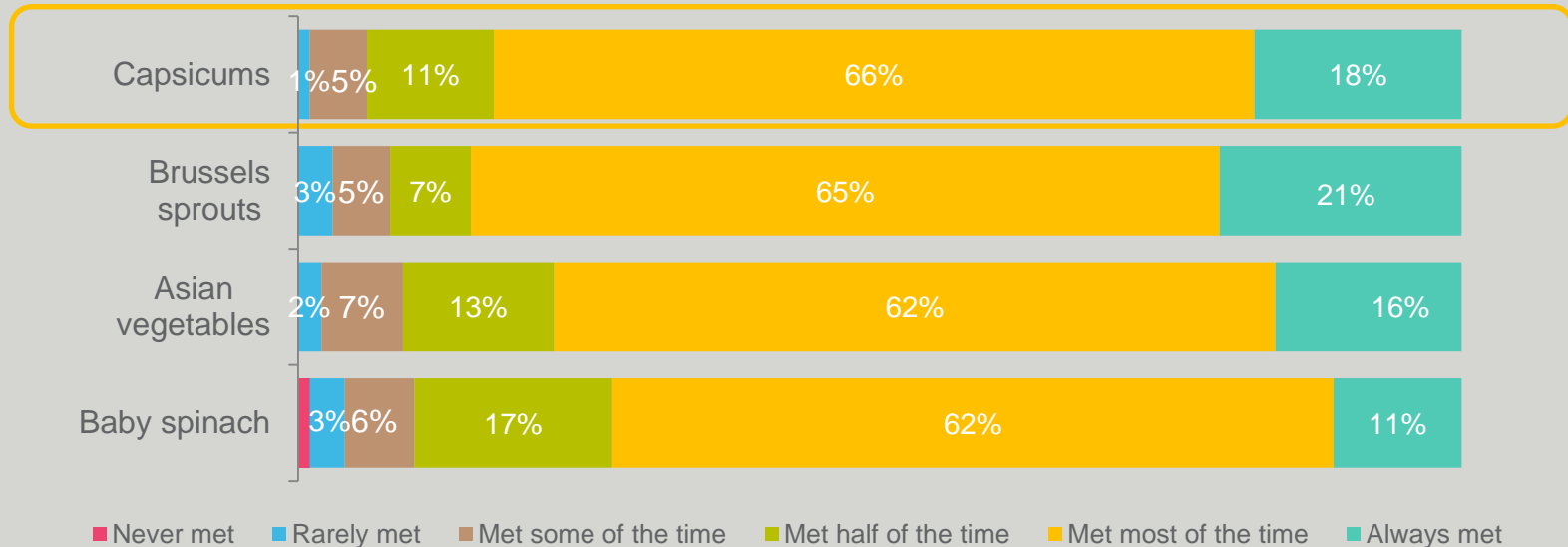
Q14. When purchasing <commodity>, how important is Provenance to you?  
Asian Vegetables N=421  
Baby Spinach N=499  
Brussel Sprouts N=319  
Capsicum N=501

# ⇒ Freshness and Longevity: Capsicums

Expected to stay fresh for 8 days

- ⇒ Respondents expected capsicums to stay fresh for 8 days after purchase.
- ⇒ Capsicums performed well on meeting these expectations, with one in five respondents saying their expectation was always met and a further two-thirds saying their expectations were met most of the time.

## Expectations Met



N=501  
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: Capsicums

\*Intel search term was Capsicum & Pepper ie. Bell Pepper  
\*Claims data was not available

# Capsicum Global NPDs

## July–September 2013

There were 4802 global capsicum (including chilli varieties and product referred to as peppers) launches in the last three months. These launches occurred primarily in Europe and the Asia Pacific. The greatest number of launches was in the UK. The top categories for launches were sauces and meals.

*Please note the search parameters used for product launches included capsicum & peppers (this included chilli varieties as well).*







## Capsicum Product Launches: Last 3 Months (July–September 2013) Summary

- There were 4802 global capsicum launches in the last 3 months. These launches contained capsicum as an ingredient (or were referred to as peppers). Chilli varieties were also included in the product launch trend data available for this round.
- Sixty five products were launched in Australia, see following slides for examples.
- Launches primarily occurred in Europe (53%) and Asia Pacific (21%).
- Flexible pack format (24%) and trays (16%) were the most used packaging.
- Sauces/seasonings (26%) and meals/meal centres (25%) were the main categories for launches.
- The most innovative product launches were capsicum chocolate veggie muffins and baby food spiced apple rice pudding with capsicum (examples of these can be found in the following pages).

*No claims related data was captured for capsicum for the last 3 months. This information will be provided in the next wave report for capsicum*



Source: Mintel (2013)

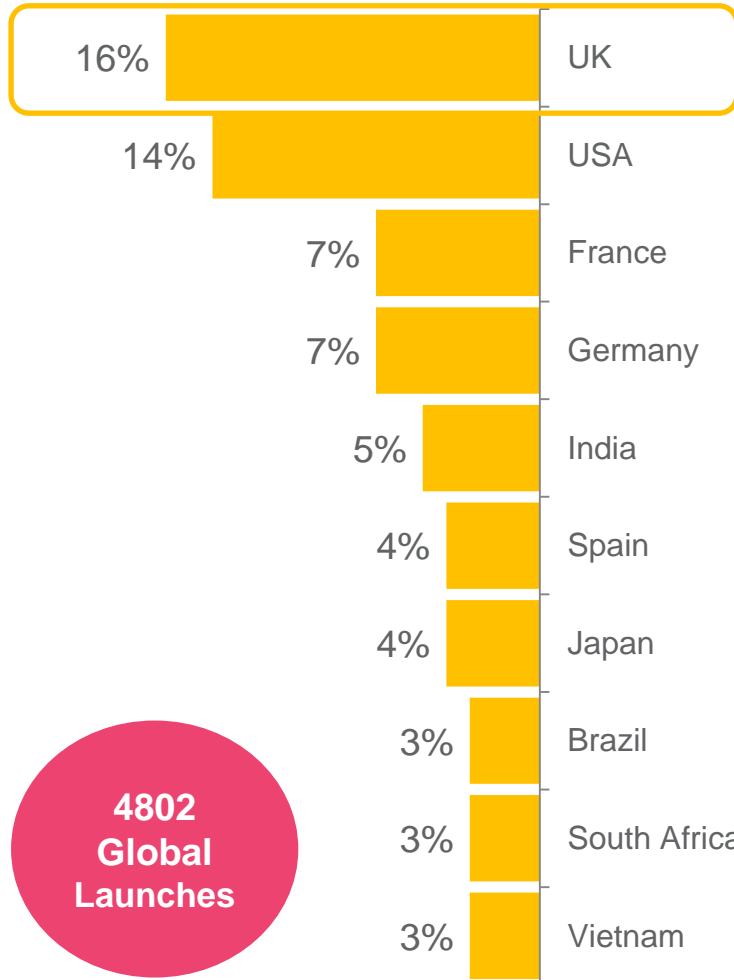


# Capsicum SKUs

## Country, Region & Categories

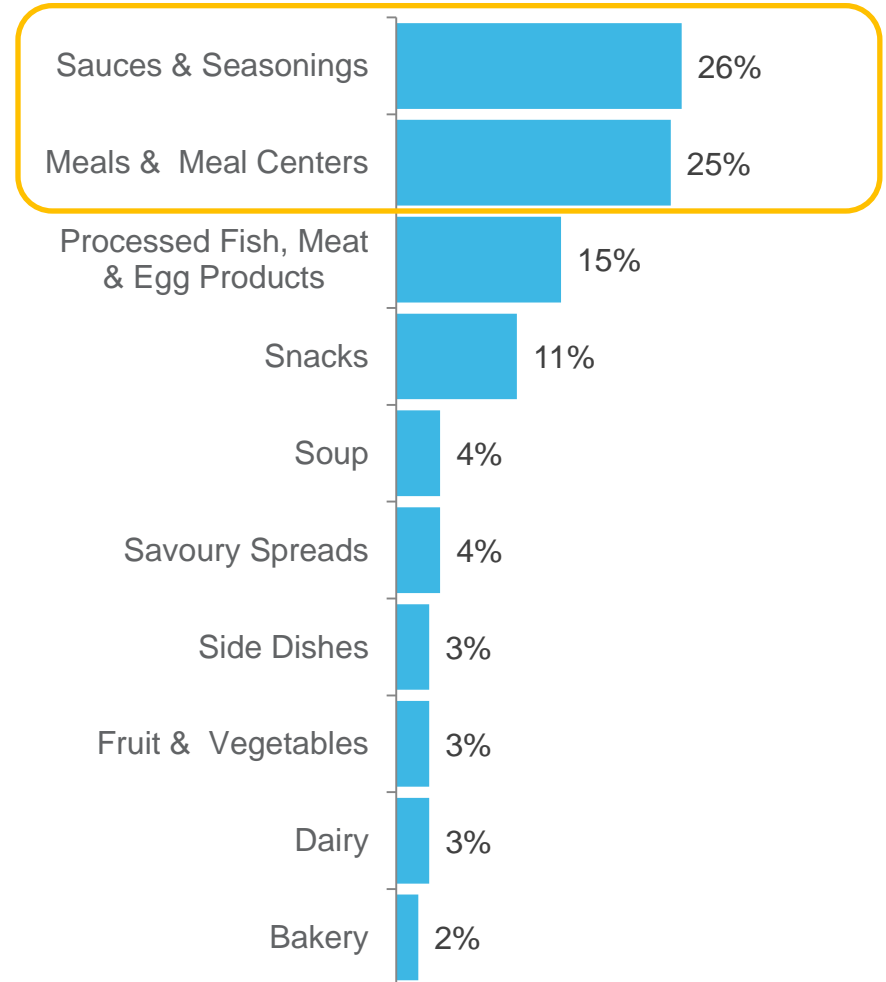
- The top launch countries were UK, USA & France.
- Sauces/Seasonings and meals had the greatest number of launches per category in the last 3 months.

### Top Launch Countries



**4802  
Global  
Launches**

### Top Launch Categories

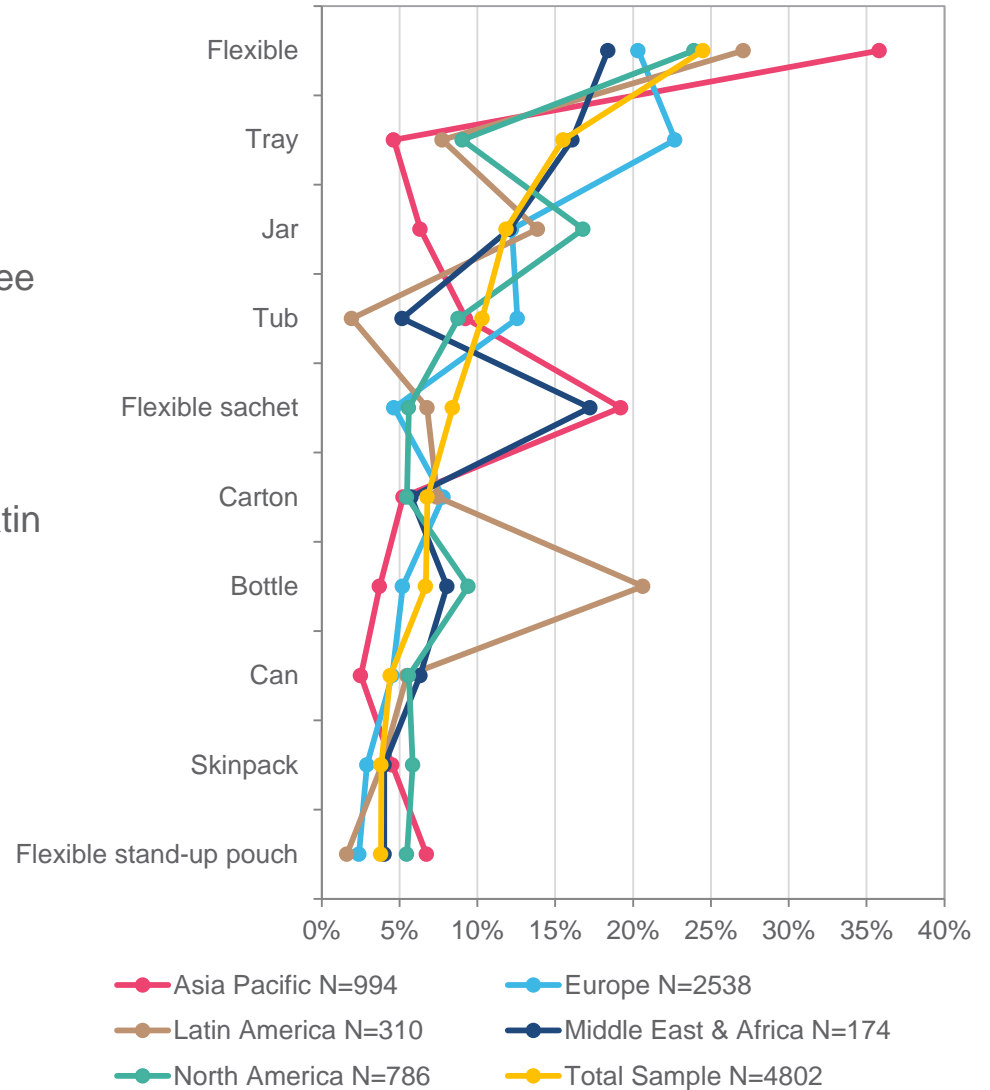




# Capsicum Launches

## Top Pack Formats Used

- ▶ Top pack formats launched in the last three months were flexible, tray and jar.
- ▶ Over a third of launches in Asia Pacific were flexible packaging.
- ▶ Bottle packaging was very common in Latin America.



Number of Global Capsicum NPD for the L3M N=4802  
Only regions with n >30 are displayed

# → Innovative Capsicum Launches: L3M (July–September 2013)

## Seven & I Premium Calamari Strips Pickled in Gochujang (Japan)

Seven & I Premium Saki Ika Gochujang (Calamari Strips Pickled in Gochujang) are chewy calamari sticks pickled in a Korean-style sweet and spicy sauce. Calamari from Hokkaido were used.



**Claims:**  
Premium, Economy

## Peacock Food Collection Spicy Buckwheat Cold Noodle (South Korea)

Peacock Food Collection Spicy Buckwheat Cold Noodle is now available. This premium product features an original buckwheat flavour, and can be conveniently prepared.



**Claims:**  
Ease of Use, Premium

## Picard Whiting & Yellow Pepper Compote Skewers (France)

Picard Brochettes de Merlan et Compotée de Poivron Jaune (Whiting & Yellow Pepper Compote Skewers) can be oven cooked, grilled or barbecued.

The product retails in a 250g pack containing two skewers.



**Claims:**  
N/A

## Ottogi Red Pepper Flavour Oil (Vietnam)

Ottogi Dau Ot (Red Pepper Flavour Oil) is ideal for frying and seasoning food. This product retails in a 80ml pack.



**Claims:**  
N/A

# ➤➤➤ Innovative Capsicum Launches: L3M (July–September 2013)

## Romantics Smooth Gazpacho (Spain)

Romantics Gazpacho Suave (Smooth Gazpacho) is new to the range. This soup has been made with extra virgin olive oil and sherry vinegar, is free from preservatives, colours, sugar, concentrates, added water, "tricks", and "lies", and has not been heated or pasteurized.



**Claims:**  
No Additives/Preservatives,  
Low/No/Reduced Sugar

## Chungjungwon Garlic & Onion Herb Seasoning Salt (South Korea)

Chungjungwon Garlic & Onion Herb Seasoning Salt has been repackaged with an updated design. The product is made with mineral-rich 100% solar salt sourced from Shinan Island, and is said to enhance flavours. It contains no synthetic flavourings, and retails in a 50g pack.



**Claims:**  
No Additives/Preservatives

## Müller Bio Primo Vegetable Stock Cubes (Germany)

Müller Bio Primo Gemüsebrühwürfel (Vegetable Stock Cubes) are purely vegetable. The clear organic broth contains 6.8% vegetables. This product retails in a 66g pack containing six cubes.



**Claims:**  
Organic

## NoMU Pork Rub (Chile)

NoMU Mezcla de Especies para Cerdo (Pork Rub) is a mix of spices featuring a blend from Orient to Occident to form an ideal alternative to marinate, roast and fry pork chops. It can be combined with soy sauce or honey to marinate pork chops.



**Claims:**  
Ease of Use, Ethical - Environmentally  
Friendly Package, All Natural Product,  
Kosher, Ethical - Environmentally  
Friendly Product

# ➤➤➤ Innovative Capsicum Launches:

## L3M (July–September 2013)

### Bon's Bon Curry Five Star Chicken Curry (China)

Otsuka / Dazhong / Bon's Bon Curry Five Star Cao Gu Ji Rou Ga Li (Chicken Curry with Straw Mushroom) takes only two minutes to be ready in the microwave. This Thai style product is free from preservatives and retails in a 210g pack.



**Claims:**  
No Additives/Preservatives, Time/Speed, Microwaveable

### Trattoria Alfredo Stone Oven Baked Margherita Pizza (Italy)

Trattoria Alfredo Steinofen Pizza Margherita (Stone Oven Baked Margherita Pizza) is now available in an XXL 1200g pack containing 4 x 300g units. This German and suitable for vegetarian product is baked in a stone oven, and is ready to be prepared in 12 to 15 minutes in the conventional oven.



**Claims:**  
Ease of Use, Vegetarian

### Landkäserei Herzog Organic Roggenburg Tuscany Style Fresh Cream Cheese Spread (Germany)

Landkäserei Herzog Roggenburger Bio Frischcreme Toscana (Organic Roggenburg Tuscany Style Fresh Cream Cheese Spread) is formulated with Mediterranean style ingredients. This product retails in a 150g tub featuring the Regional & Fair logo.



**Claims:**  
Organic, Ethical - Human

### Chill Orange, Tangerine, Pineapple, Fruit & Vegetable Juice (Canada)

Chill Orange, Tangerine, Pineapple, Fruit & Vegetable Juice contains 60 calories per 250ml serving and has no artificial sweeteners. The product retails in a 2 x 1.89L recyclable pack.



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





# Australian Capsicum Launches: L3M (July–September 2013)

## Coles Simply Gluten Free Mexican Style Quinoa & Brown Rice Cups

Coles Simply Gluten Free Mexican Style Quinoa & Brown Rice Cups are a good source of fibre and contain no gluten, MSG, artificial colours or flavours. Lightly spiced Mexican inspired quinoa & brown rice is suitable for vegetarians.



## Woolworths Select Asian Thai Red Curry Instant Soup

Woolworths Select Asian Thai Red Curry Instant Soup with noodles is said to be the perfect satisfying snack for any-time of the day. The soup is 98% fat free, packed full of flavour and quick and easy to prepare.



## McCain Ultra Thin Crust Angus Beef Pizza

McCain Ultra Thin Crust Angus Beef Pizza has been reformulated with a new crispier crust. The product is made with real ingredients, such as certified Australian Angus beef with capsicum, mozzarella and cheddar cheese, and drizzled with BBQ bourbon sauce.



## Woolworths Select Asian Laksa Instant Soup

Woolworths Select Asian Laksa Instant Soup is quick and easy to prepare. This 98% fat free product has no added MSG and contains no artificial colours or flavours. To prepare, just add boiling water.



## Premium Tasmanian Pate Twin Selection Pate

Premium Tasmanian Pate Twin Selection Cracked Pepper Pate & Orange Brandy Pate has been repackaged in a newly designed pack. The product retails in 130g pack, divided into two portions.



## Picasso Foods Entertainers Appetisers

Picasso Foods Entertainers Appetisers comprises marinated grilled capsicum, marinated diced feta, basil pesto, Australian semi dried tomatoes, and mixed gourmet olives.



## Macro Wholefoods Market Organic Lamb, Chickpea & Spinach Soup

Macro Wholefoods Market Organic Lamb, Chickpea & Spinach Soup is Australian certified organic and gluten-free. The hearty tomato soup is 97% fat-free and contains no added preservatives.



## Ainsley Harriott World Kitchen Chilli & Lime Flavoured Quinoa & Basmati Rice

Ainsley Harriott World Kitchen Chilli & Lime Flavoured Quinoa & Basmati Rice savoury mix of quinoa & basmati rice with peppers, natural lime flavourings and ground spices. It contains <2% fat, free from artificial flavours and colours.







In the Media.

## ➤➤➤➤➤ General Vegetable News (July–September 2013)

- Coles and Woolworths are in the process of renewing deals with local vegetable and fruit supplies, Simplot and SPC Ardmona, respectively. These deals are off the back of consumer preference for Australian grown produce including canned and frozen foods.
- An early harvest of asparagus will lead to good quality and value for consumers this spring.
- Vegetable exports to South East Asia have risen over the past 5 years. Exports to Indonesia alone have increased from \$6 million to \$11 million over the past few years. In Asia, Australian vegetables are known for their high quality.



Source: [www.abc.net.au/news/rural/industry/vegetables](http://www.abc.net.au/news/rural/industry/vegetables)

# ➤➤➤ Commodity News

## (July–September 2013)



- The most commonly bought Asian Vegetables were Chinese cabbage and pak choy.  
([www.smh.com.au](http://www.smh.com.au))



- Baby Spinach Odd Spot: In New York, a Tugboat race on the Hudson River is accompanied by a spinach eating contest for spectators, in honour of Popeye.  
([www.bloomberg.com](http://www.bloomberg.com))



- In the UK, Produce World, a major supplier of brassicas, are trialling mild-tasting, strong-tasting and red Brussels sprouts  
([www.thegrocer.co.uk](http://www.thegrocer.co.uk))
- Eating cruciferous vegetables like Brussels sprouts releases sulforaphane, which researchers from the University of East Anglia in the U.K. say has anti-cancer and anti-inflammatory properties. Findings are now being tested on osteoarthritis sufferers.  
([www.webmd.com](http://www.webmd.com))



- Capsicum Odd Spot: SHOREbar in Santa Monica, L.A. is using fruits and vegetables in its cocktails to cater to the healthy LA lifestyle. A Day in the Canyon mixes tequila, fresh mango, cilantro, yellow capsicum and lime juice, on the rocks.  
([www.la-confidential-magazine.com](http://www.la-confidential-magazine.com))



Thanks.