



# Horticulture Australia and AUSVEG. VG12078 Project Harvest.



Monthly Tracker Report Wave 20: Asian Vegetables, Beetroot, Capsicums  
& Sweetpotatoes  
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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 contracted to conduct a monthly online tracking project following specified vegetables across a three year period; monthly trend analysis; and additional ad-hoc projects to assist in this understanding of consumers.

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

This wave's report (Wave 20, January 2015) focuses on:

- Asian Vegetables
- Beetroot
- Capsicums
- Sweetpotatoes

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

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





# 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 Innovation 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, 662 respondents completed the questionnaire. Respondents represented most states and territories, as well as both metro and rural areas.

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

To qualify for the questionnaire, respondents...

- ⇒ Were aged 18 years and over
- ⇒ Purchased fresh vegetables at least once a month
- ⇒ Purchased at least one of the monthly commodities (Asian Vegetables, Beetroot, Capsicum & Sweetpotatoes) within the last month
- ⇒ Were the main or joint grocery buyer

	Total N=662	Asian Vegetables n=317	Beetroot n=289	Capsicum n=353	Sweet- potatoes n=353
<b>Gender</b>					
Male	31%	35%	37%	28%	26%
Female	69%	65%	63%	72%	74%
<b>Age</b>					
18-24 y.o.	6%	9%	6%	6%	5%
25-34 y.o.	21%	23%	24%	18%	18%
35-44 y.o.	17%	20%	16%	16%	16%
45-54 y.o.	17%	15%	16%	18%	19%
55-64 y.o.	18%	15%	19%	19%	20%
65+ y.o.	21%	18%	19%	23%	22%
<b>Household</b>					
Single Income no Kids	18%	18%	18%	18%	16%
Double Income no Kids	21%	22%	23%	20%	19%
Young Families	17%	21%	16%	15%	16%
Established Families	20%	20%	18%	20%	22%
Empty Nesters	25%	19%	25%	27%	27%
<b>Location</b>					
New South Wales	23%	21%	27%	23%	24%
Victoria	17%	20%	19%	15%	16%
South Australia	16%	15%	11%	20%	18%
Queensland	19%	21%	22%	18%	17%
Western Australia	17%	17%	16%	17%	18%
Tasmania	5%	5%	3%	6%	6%
Australian Capital Territory	2%	3%	1%	2%	2%

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





# Trends Research: Our Approach



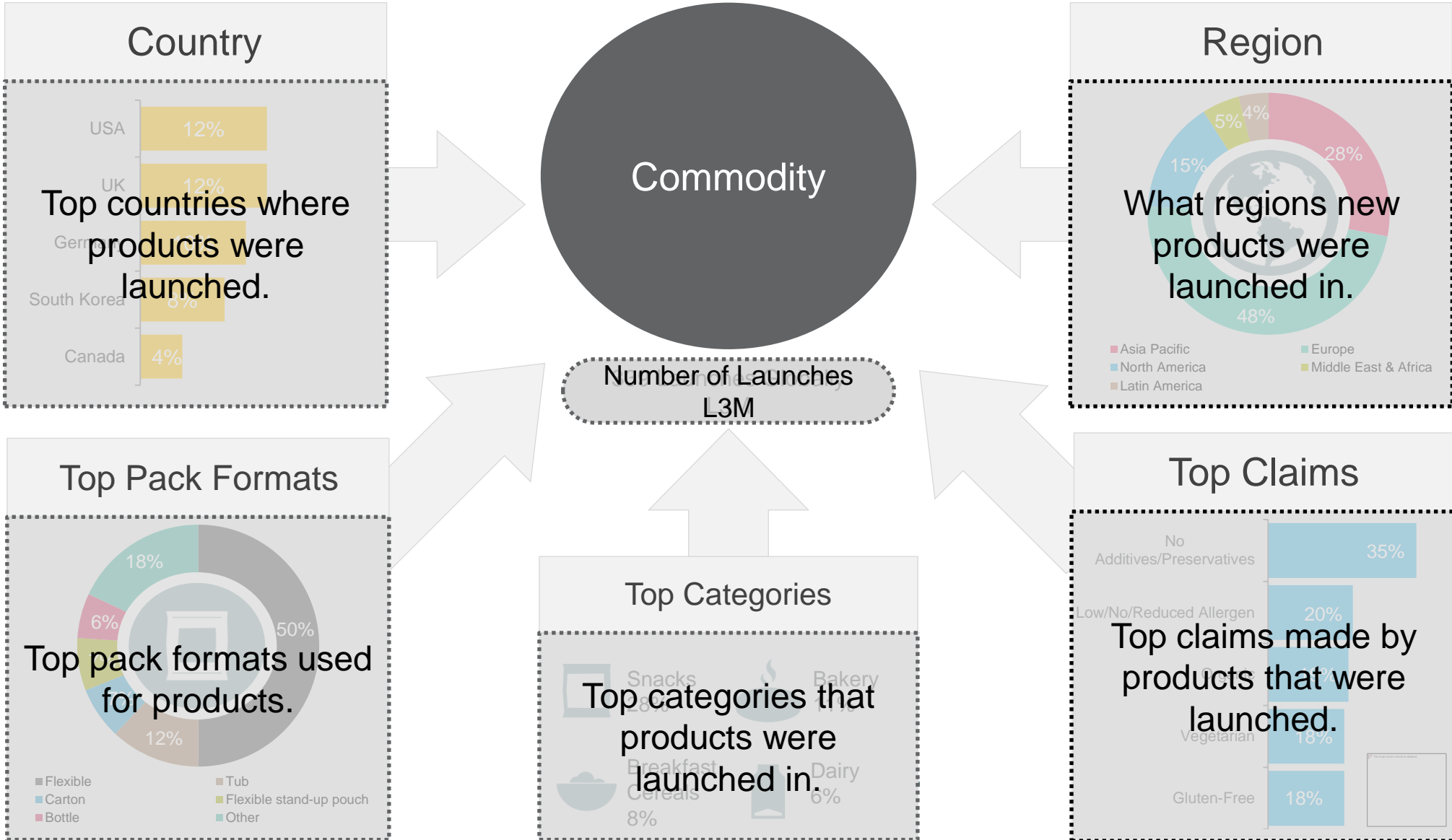
- ▶ Colmar Brunton has used a combination of both desk research and in the field market research to explore the trends of each vegetable commodity being tracked this month.
- ▶ Our main source of secondary data for this report was collected from Mintel Global New Products Database (GNPD).
- ▶ This data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



# Product Launches Last 3 Months (L3M)

## How to Read Summaries

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







# Wave 20: Executive Summary





# Asian Vegetable Grower Action Plan



The purchase of Asian Vegetables continues to rise.

1.

## Insight:

Asian Vegetables have the strongest purchase intent of all vegetables.

## Recommendation:

Continue to grow the category by targeting both new users and existing users (through more occasions). Target new users with Quick Meal ideas and products and ease/convenience of preparation.

2.

## Insight:

Consumption of Asian Vegetables is largely unaffected by seasonality.

## Recommendation:

Promote as a year-round commodity with meal ideas for both summer and winter months.

3.

## Insight:

Asian Vegetables are commonly served with carrot, capsicum and onion.

## Recommendation:

Investigate NPD opportunities similar to recent launches like nutty slaw and Asian salads (including the above vegetables) to help increase overall consumption and meal occasions.





Use of Beetroot in Snacks is on the increase.

1.

**Insight:**

Globally there has been a large amount of product innovation featuring beetroot – in Australia these products include salads, juices and dips.

**Recommendation:**

Develop products that fit the observed growth in snacking, linking these products to the health and taste benefits that influence purchase.

2.

**Insight:**

Consumers are increasingly purchasing bunches of beetroot.

**Recommendation:**

Investigate alternative serving formats to meet broader needs (for example, for snacking – freshly grated, baby beets, etc).

3.

**Insight:**

Awareness of beetroot varieties remains low and lack of knowledge of varieties is a barrier to purchase.

**Recommendation:**

Better promote 'baby' varieties through recipe cards and point of sale material to improve consumer knowledge of this variety.





More consumers recognise the benefits of Sweetpotato for the whole family.

1.

**Insight:**

Sweetpotato repertoire is currently limited to dinner meal occasions.

**Recommendation:**

Promote that sweetpotato is great for the whole family and can be used throughout the day – from breakfast (rosti) through to snacking (chips), lunch (salad) and dinner.

2.

**Insight:**

The main new product launches including Sweetpotato have been for snacks.

**Recommendation:**

Investigate NPD opportunities around snacking occasions such as Sweetpotato cakes, dips, chips and juices.

3.

**Insight:**

Sweetpotato is most commonly consumed in Australian cuisine.

**Recommendation:**

Promote alternative cuisines utilising Sweetpotato such as European (gnocchi, filled pasta and soups) and Asian (dumplings, spring rolls and curries).



65%

Colour is the key trigger to purchase for Capsicums.

1.

**Insight:**

Red, green and yellow Capsicums are the most commonly recalled types.

**Recommendation:**

Increase availability of orange and purple Capsicums to increase consumption and add further colour to meals.  
Potential to differentiate colours based on cooking styles and flavour profiles.

2.

**Insight:**

Price (perceived high cost) is a key barrier to purchase.

**Recommendation:**

Individual capsicums remain the key format for purchase.  
Improve value of bundled Capsicum offers in trays and bags – consider 2 packs to provide a more affordable option for consumers.

3.

**Insight:**

Capsicum is commonly served with tomatoes, carrots, onion and lettuce.

**Recommendation:**

Investigate NPD opportunities in salad bags which include the above vegetable mixes to increase Capsicum appeal and consumption.



# Fast Facts

(1 of 2)

## Asian Vegetables:

- ▶ Asian vegetables had positive consumer sentiment and propensity to purchase, consistent with previous months.
- ▶ Asian vegetables are purchased 4.9 times per month and are consumed 9.0 times per month, slightly higher than previous waves.
- ▶ Consumers purchase 1kg of Asian vegetables per shop. Recalled last spend was \$6.00. Overall, consumers perceive Asian vegetables to be good value for money.
- ▶ National price tracking indicated the average price for Bok Choy in September was \$2.07, which was relatively consistent between state and retailers.
- ▶ Awareness has remained steady, with a third of consumers unable to recall a type. Bok Choy remained the most recalled type of Asian vegetable, followed by Choy Sum and Wombok.
- ▶ Asian vegetables are expected to stay fresh for up to 5 days, and freshness expectations are met most of the time. Asian vegetables appear to be largely unaffected by seasonal changes.
- ▶ Ease of preparing and cooking and health are the main influences on purchase of Asian vegetables. Short shelf life and consuming enough for their needs are primary barriers to purchase.

## Beetroot:

- ▶ Beetroot had strong levels of endorsement, indicating consumers are happy to recommend to family and friends. Future propensity to purchase was high.
- ▶ Beetroot is purchased approximately 3.2 times per month. Consumption of Beetroot occurs 8.12 occasions per month, up from the previous wave.
- ▶ On average, consumers purchase 1kg of Beetroot. Recalled last spend was \$4.30. Overall, consumers perceived good value for money.
- ▶ Pricing analysis revealed both loose and bunched Beetroot could be purchased from most mainstream retailers. Average price per kilo in January was \$4.85, consistent between state and retailers.
- ▶ Awareness of beetroot types is very low, with two thirds of consumers unable to recall a type.
- ▶ Beetroot is expected to remain fresh for over 10 days. Freshness expectations have increased and are generally met by consumers.
- ▶ Taste and health remain the key triggers to purchase, strengthening on the last wave. The main barriers to future purchase are consuming enough and wanting variety.





# Fast Facts

(2 of 2)

## Sweetpotato:

- ▶ Sweetpotato had strong consumer sentiment, however satisfaction was below the Harvest mean.
- ▶ Purchase of Sweetpotato occurred 3.3 times per month and was consumed 7.9 times per month, up slightly on last wave. Purchase was from mainstream retailers.
- ▶ Overall, Sweetpotato is perceived to be good value for money (6.4/10). Consumers on average purchase 1.1kg of Sweetpotato, typically individually. Recalled last spend was \$4.00.
- ▶ Price tracking for January 2015 revealed an average price of \$5.44 per kilogram, up from September prices.
- ▶ Roughly two thirds of respondents couldn't recall a variety of Sweetpotato, those who did more often recalled the colour rather than a specific variety, with Orange / Gold / Yellow being the most recalled colour.
- ▶ Taste and health were the strongest triggers to purchase, while already consuming enough for their needs and wanting variety in vegetables were the two biggest barriers, these were consistent with the previous wave.
- ▶ Consumers expected Sweetpotato to remain fresh for over 12 days. Expectations of freshness were largely met.

## Capsicum:

- ▶ Consistent with previous waves, Capsicums had strong category health figures for importance, satisfaction, endorsement, interest in new and future purchase intent.
- ▶ Purchase and consumption frequency of Capsicums had stabilised, with over 10 consumption occasions per month. Purchase was mainly from Coles, Woolworths and specialist retailers.
- ▶ Consumers on average are purchasing 640g of Capsicums. Recalled last spend was \$3.90, which was perceived as fair value for money.
- ▶ Price tracking for January 2015 showed the national average as \$6.29 per kg for green Capsicums.
- ▶ Approximately one half of respondents were able to recall a type of Capsicum. Colour was the main trigger to recall.
- ▶ Adding colour to a meal and using as an ingredient in dishes remain the key influences to purchase. Barriers to purchase included price and consuming enough for their needs.
- ▶ Consumers expected Capsicum to remain fresh for over 8 days once purchased, expectations were in line with previous waves and were generally met.



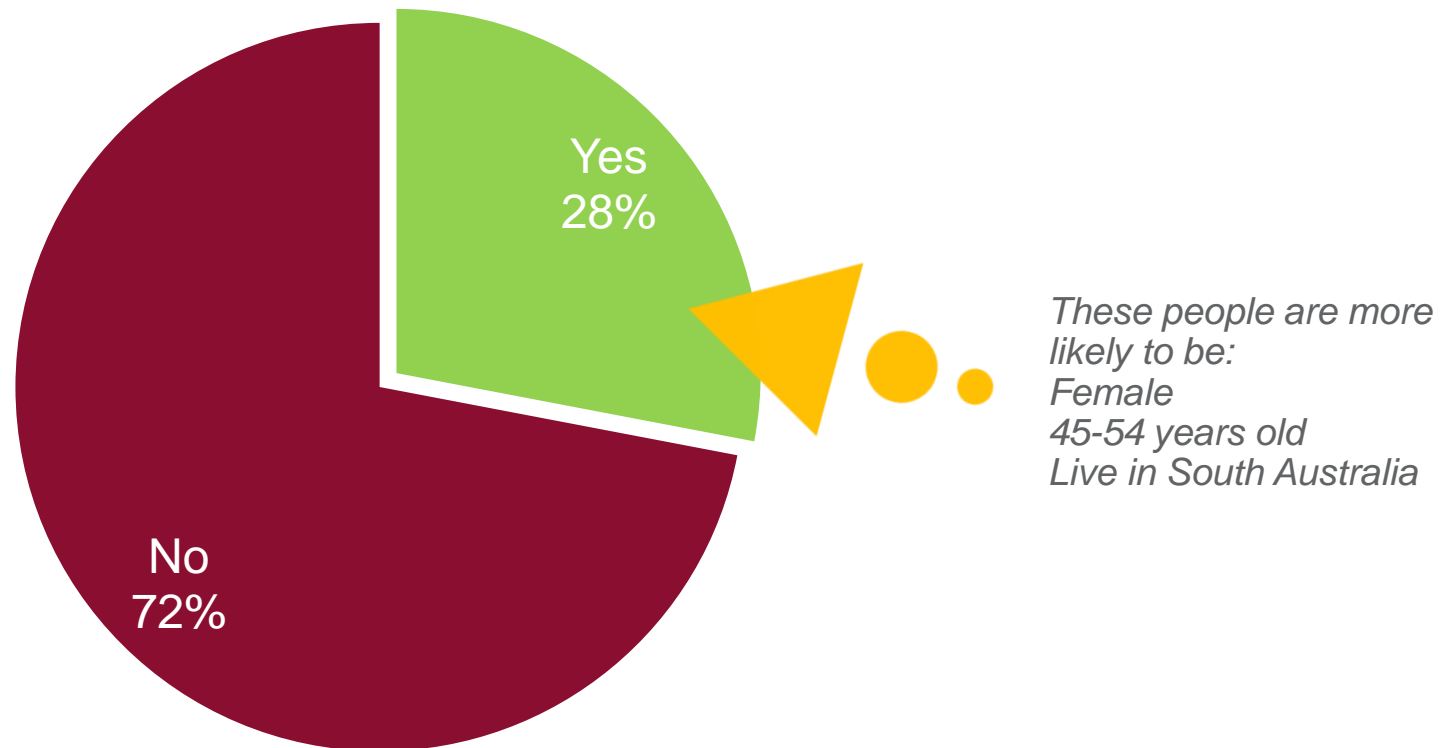


# Wave 20: Ad-Hoc Questions





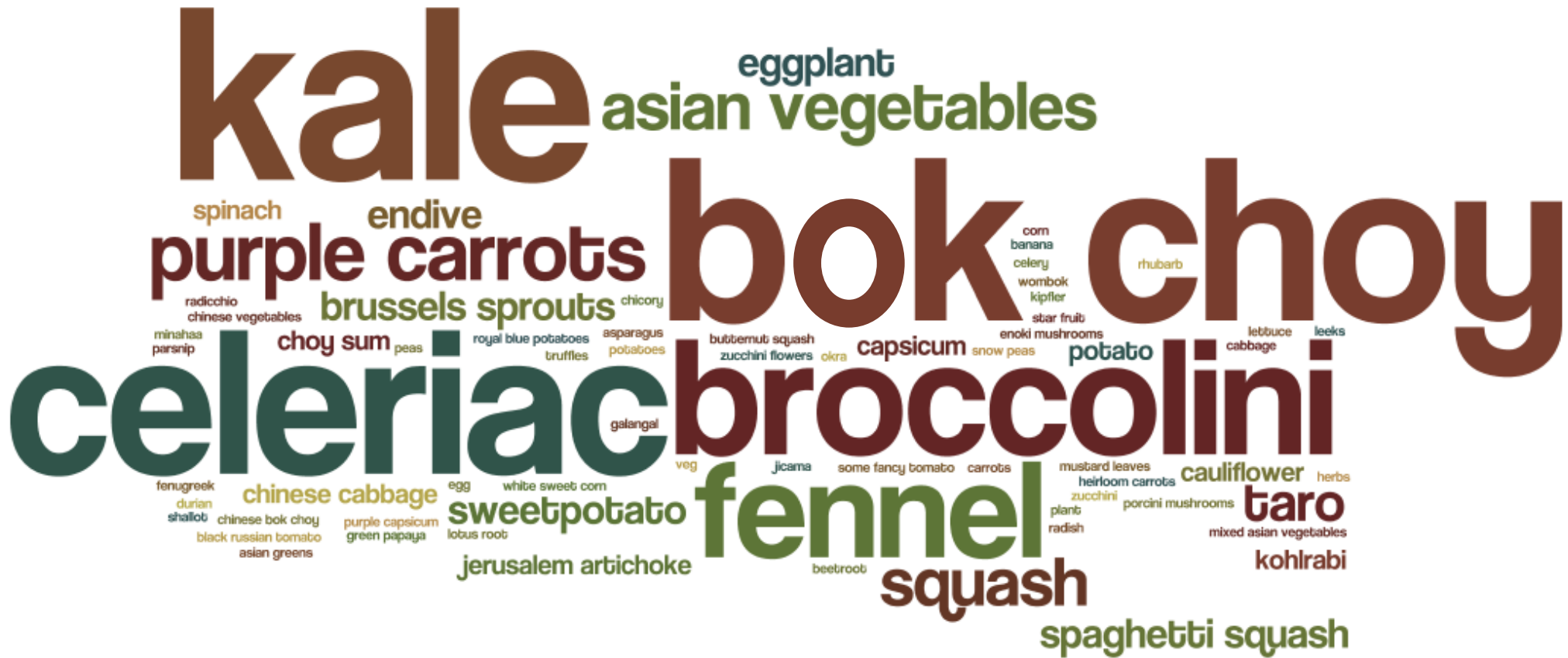
Usage on a TV show or online has encouraged over a quarter of consumers to purchase a new vegetable.



Have you ever purchased a new vegetable after seeing it used on TV or online?  
N=662



A large number of vegetables have been trialled after seeing it used on a TV show or online. Kale, Bok Choy and Celeriac had the greatest uptake by consumers.



AHQ2. What was the vegetable you purchased?  
N=662

➔ The key media influence on vegetable trials are cooking shows, especially My Kitchen Rules and Masterchef.

Cooking shows are a successful way to promote new vegetables and varieties, and it is important to ensure consumers understand the flavour, taste and health benefits that it will add to a dish.



AHQ2. What was the TV program/Online website that you saw the vegetable being used on?  
N=662



# Wave 20: Overall Vegetable Tracking

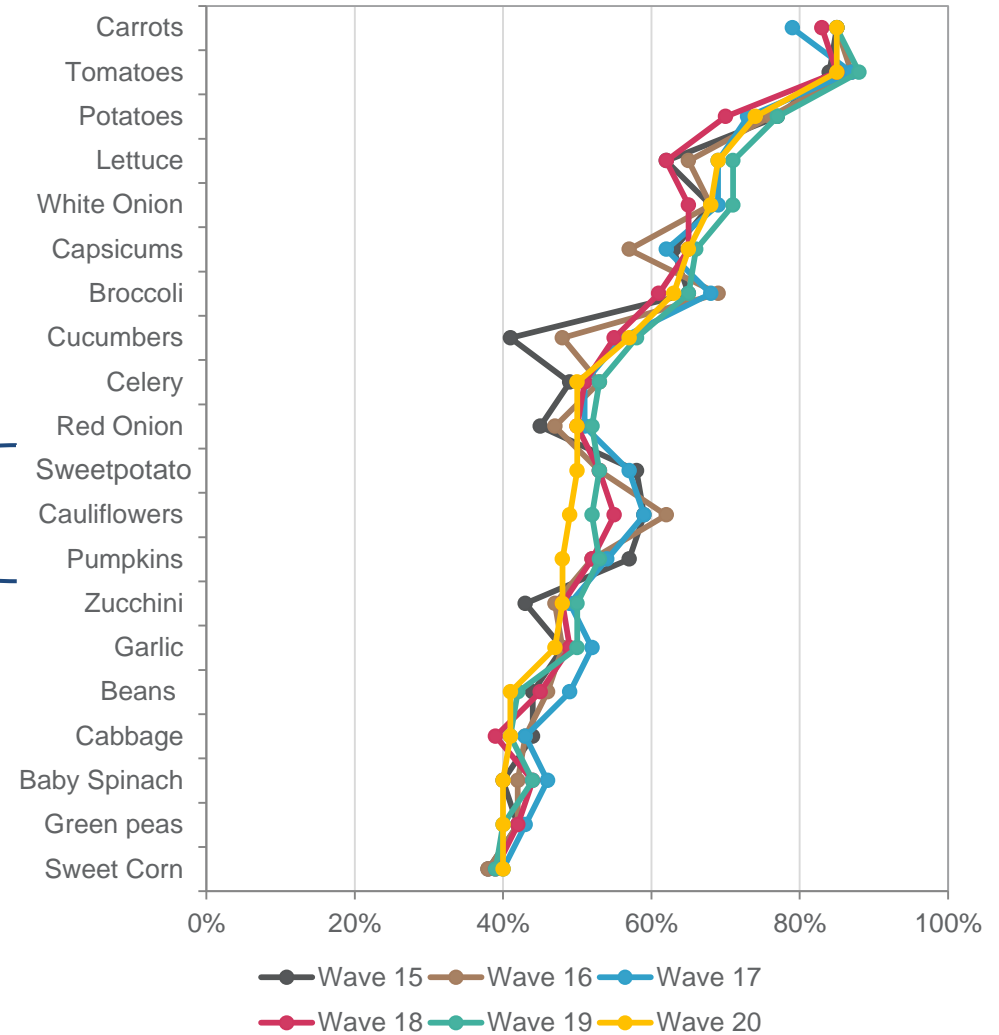




Top 20 vegetables purchased last month were carrots, tomatoes, potatoes, lettuce, potatoes and lettuce.

Purchase behaviour was on trend with past months.

*Decline of these vegetables over the past six months. Purchase may be influenced by seasonality and should increase over the next six months.*





# Category Health Explained

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

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

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



Endorsement is strong this wave for all commodities, especially Sweetpotato. Endorsement and recommendation to family and friends is good for trial.

Interest in new varieties is also high, with consumers very interested in new types of Asian Vegetables.

Propensity to purchase in the future is high for Asian Vegetables, Beetroot and Sweetpotato, whilst Capsicum purchase looks to remain stable.

	Asian Vegetables	Beetroot	Sweetpotato	Capsicum	Harvest Total Mean
Importance	7.2	5.9	6.3	7.0	6.3
Satisfaction	6.5	6.1	6.3	7.0	6.6
Endorsement	7.4	7.2	7.6	6.9	6.8
Interest (New Types)	7.2	6.2	6.7	6.4	6.1
Future Purchase					
More	25%	22%	20%	8%	14%
Same	75%	77%	80%	92%	84%
Less	0%	1%	0%	0%	2%

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



Asian  
Vegetables.





Purchase and consumption are higher this wave, consumed on average 9 times per month.

Purchase from non-mainstream channels is stronger, particularly specialist retailers and markets.

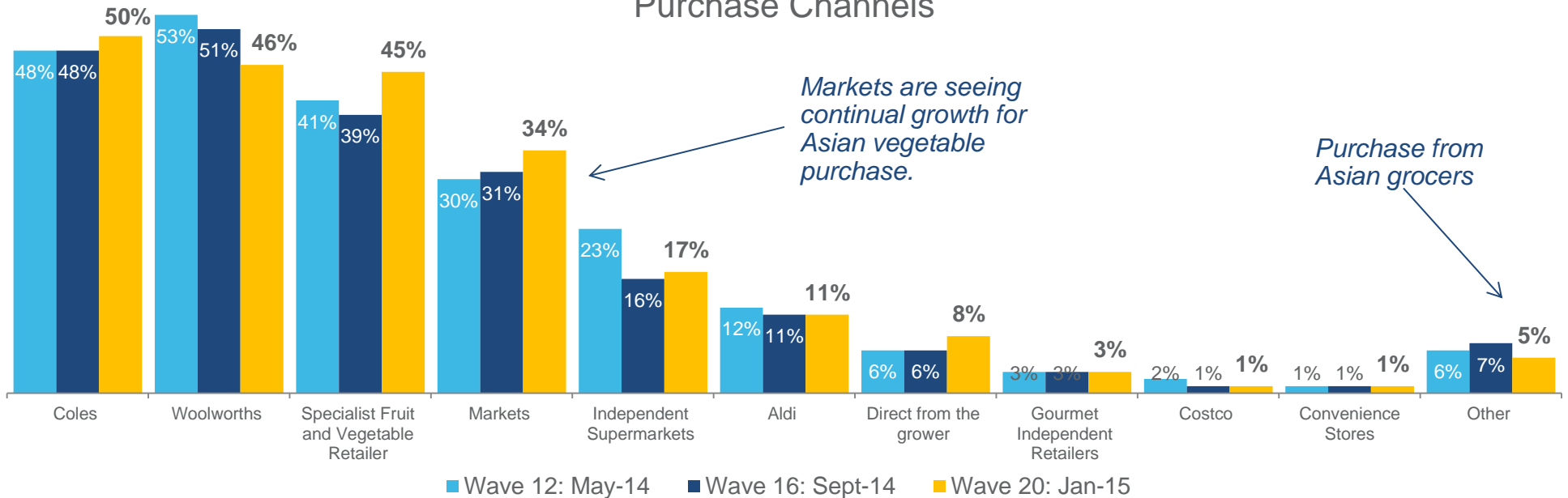


- ▼ 4.6 times, Wave 12
- ▼ 4.5 times, Wave 16



- ▼ 8.0 times, Wave 12
- ▼ 8.7 times, Wave 16

### Purchase Channels



Q1. On average, how often do you purchase <commodity>?  
 Q2. On average, how often do you consume <commodity>?  
 Q5. From which of the following channels do you typically purchase <commodity>?  
 Sample Wave 12, N=305, Wave 16, N=303, Wave 20, N=317



# Average spend and price sensitivity and perceptions have remained relatively stable.



Average weight of purchase

The average consumer typically purchased **1.0kg** of Asian Vegetables in January 2015, which is relatively consistent across waves.

▼ 0.9kg, Wave 12  
— 1.0kg, Wave 16



Recalled last spend

The average recalled last spend was **\$6.00** in January 2015. This has been stable across the last three waves.

— \$6.00, Wave 12  
— \$6.00, Wave 16



Value for money

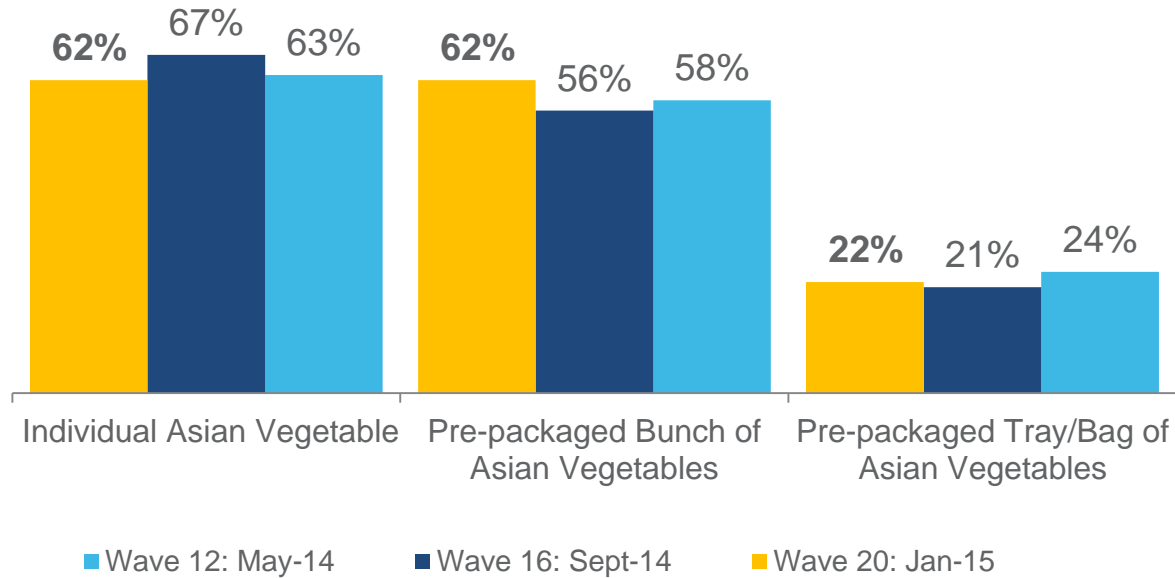
On average, consumers perceived Asian Vegetables to be good value for money (**6.6/10**), in line with previous months.

— 6.6/10, Wave 12  
▲ 6.7/10, Wave 16

Q3. How much <commodity> do you typically purchase when you shop for it?  
Q3b. To the best of your memory how much did this cost on your most recent typical purchase?  
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)  
Sample Wave 12, N=305, Wave 16, N=303, Wave 20, N=317



# Individual and pre-packed bunches of Asian vegetables are both relevant formats to consumers.

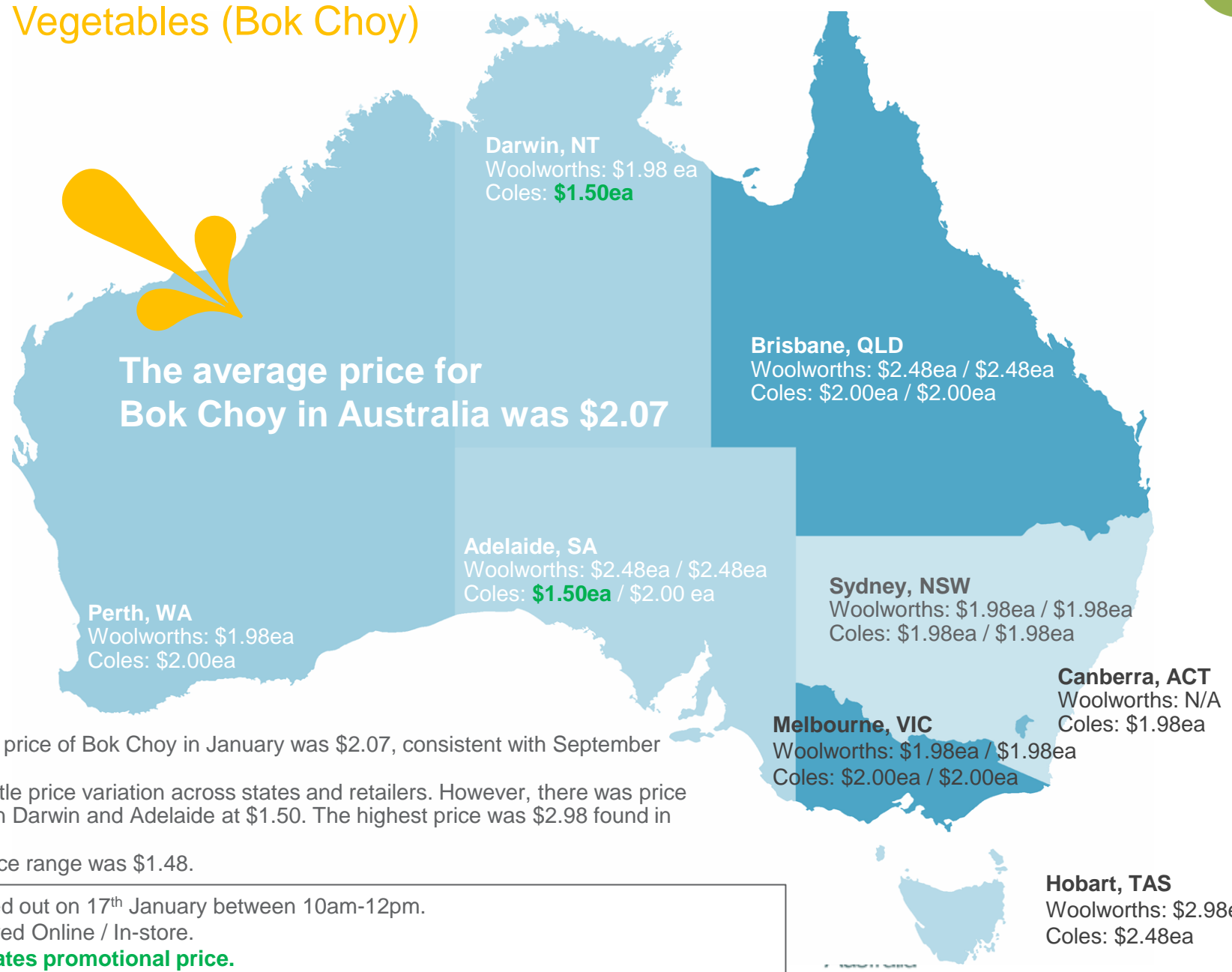


	Individual	Pre-packaged Bunch	Pre-packaged Tray
Wave 12	2.5	1.6	1.4
Wave 16	2.6	2.1	2.0
Wave 20	2.4	2.0	1.8

Sample Wave 12, N=305, Wave 16, N=303, Wave 20, N=317  
Q3a. How much <commodity> does this typically equate to?

# Online and In-store Commodity Prices

## Asian Vegetables (Bok Choy)



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

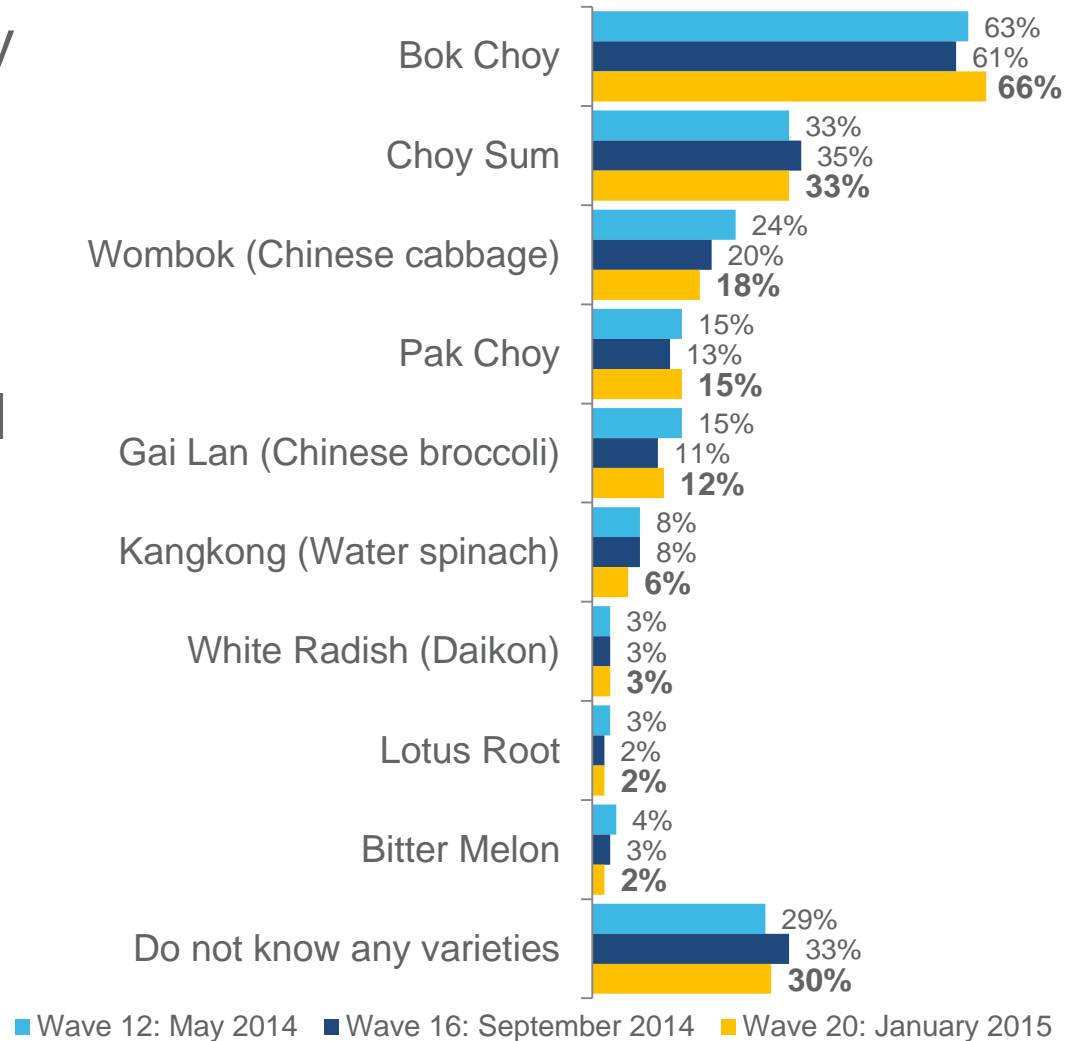
- The average price of Bok Choy in January was \$2.07, consistent with September prices.
- There was little price variation across states and retailers. However, there was price promotions in Darwin and Adelaide at \$1.50. The highest price was \$2.98 found in Hobart.
- The retail price range was \$1.48.

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



Awareness of Asian vegetables remains relatively high, with approximately three quarters of consumers able to recall a type.

Bok Choy consistently has the greatest awareness of all varieties. Consumers are less aware of the multiple other varieties of Asian vegetables.



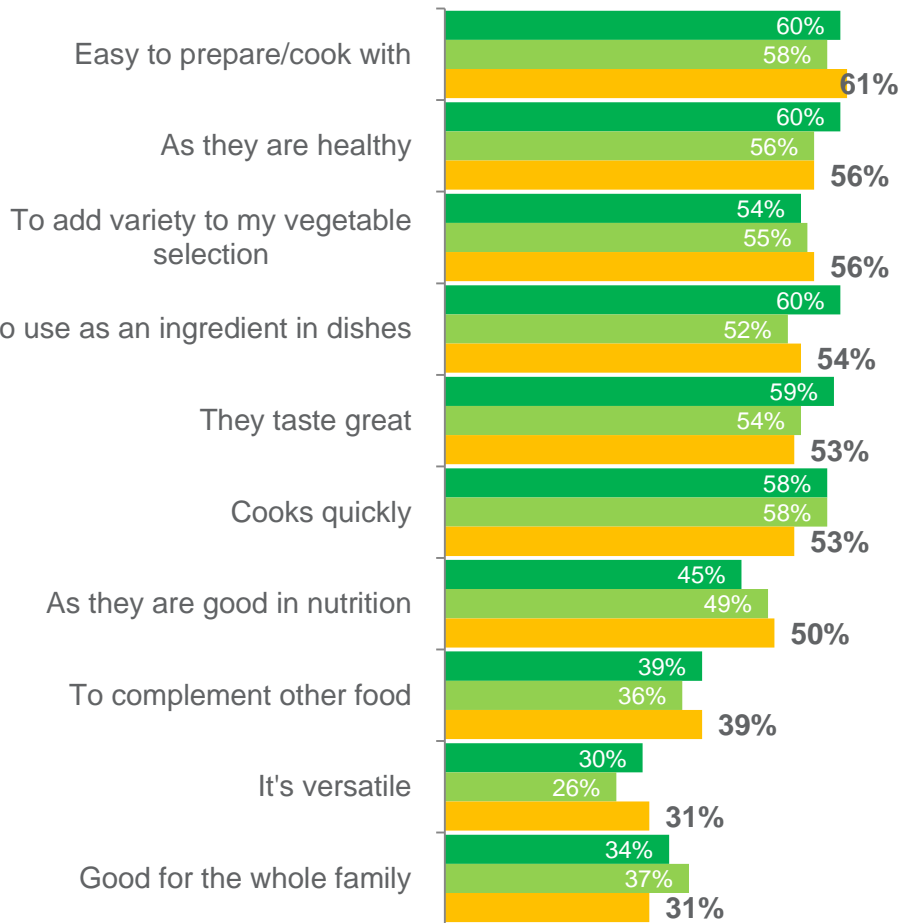
Sample Wave 12, N=305, Wave 16, N=303, Wave 20, N=317  
Q6a. What varieties/types of <commodity> are you aware of? (unprompted)



On trend with previous months, ease of preparing and cooking is the key driver of purchase. Short self life and perceptions of consuming enough Asian vegetables are the main barriers.

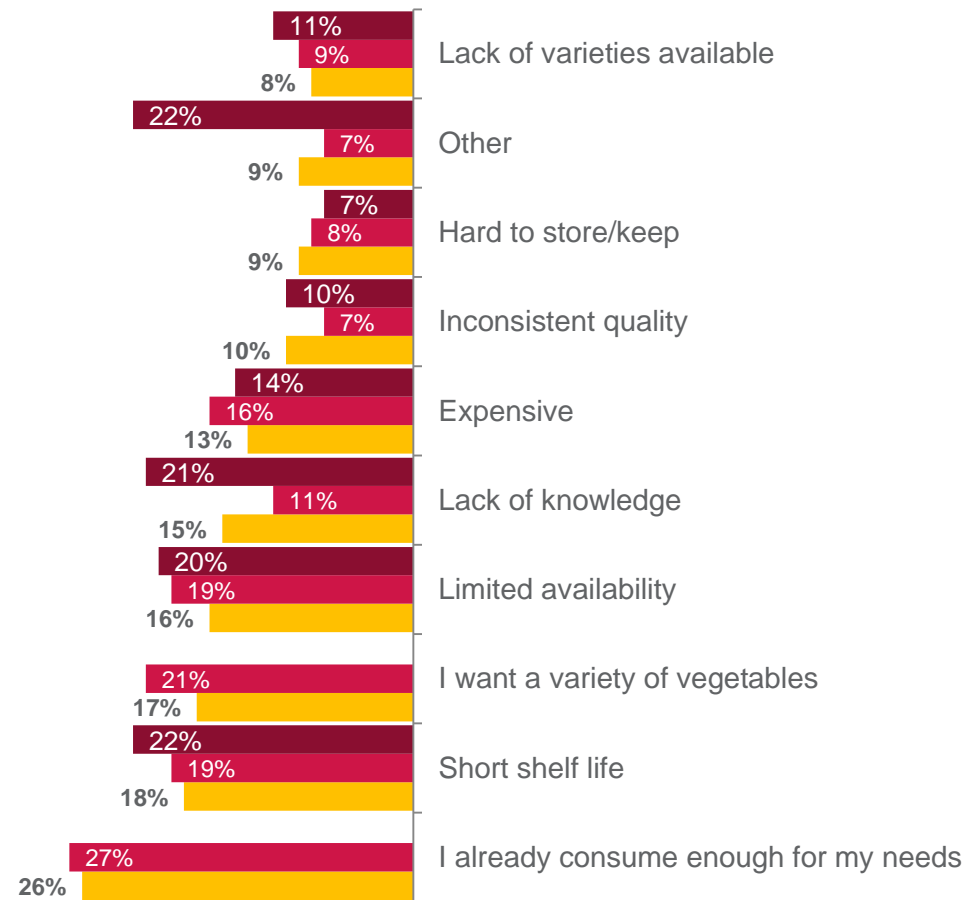


### Triggers



■ Wave 12: May-14   ■ Wave 16: Sept-14   ■ Wave 20: Jan-15

### Barriers



■ Wave 12: May-14   ■ Wave 16: Sept-14   ■ Wave 20: Jan-15

Sample Wave 12, N=305, Wave 16, N=303, Wave 20, N=317  
 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?



Cuisine remains consistent across waves, heavily skewed towards Asian style cooking.

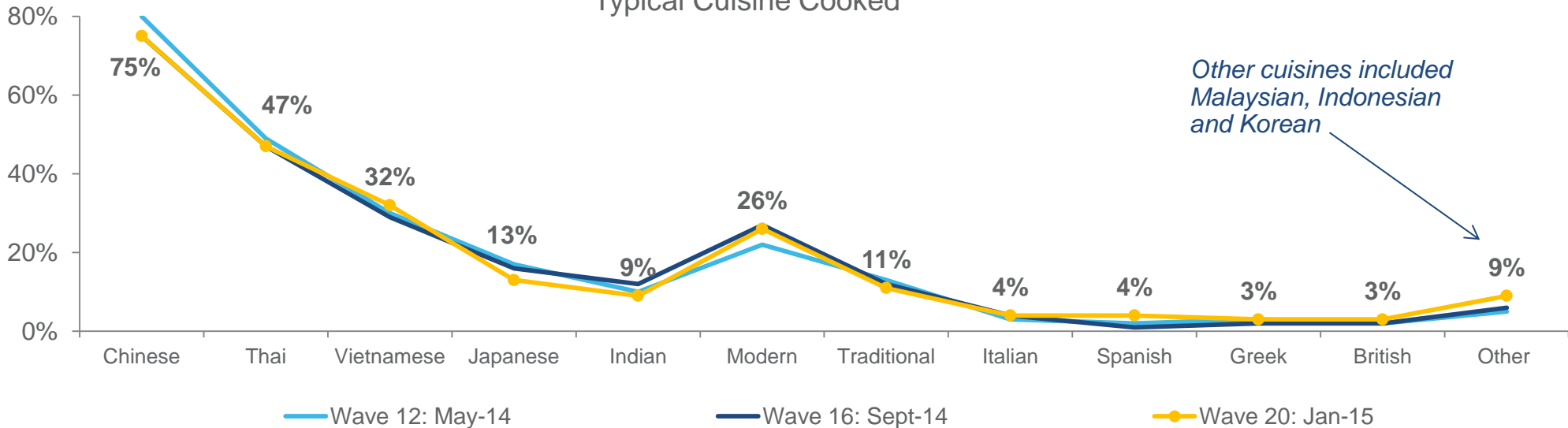
Dinners and quick meals are the key meal occasions.



Top 5 Consumption Occasions

	Wave 20	Wave 16	Wave 12
Weekday Dinner	56%	57%	61%
Quick Meals	44%	38%	45%
Weekend Dinner	37%	37%	39%
Every-day	34%	38%	29%
Family meals	34%	31%	37%

Typical Cuisine Cooked



Other cuisines included Malaysian, Indonesian and Korean

Asian Australian European Other

Sample Wave 12, N=305, Wave 16, N=303, Wave 20, N=317
Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?



Indicates LOWER score than current wave.
Indicates HIGHER score than current wave.

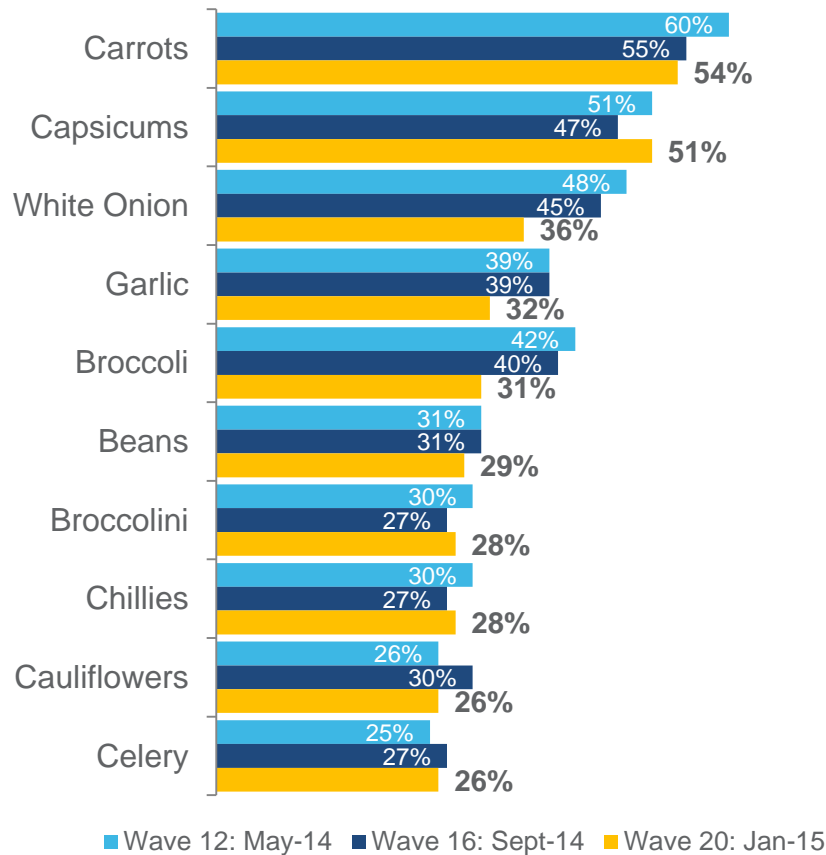


Cooking preferences have remained consistent between waves. Consumers are typically stir frying Asian vegetables. Although a small number, there has been a steady increase of eating Asian vegetables raw.



Asian vegetables are cooked with carrots, capsicums and onion.

Accompanying Vegetables



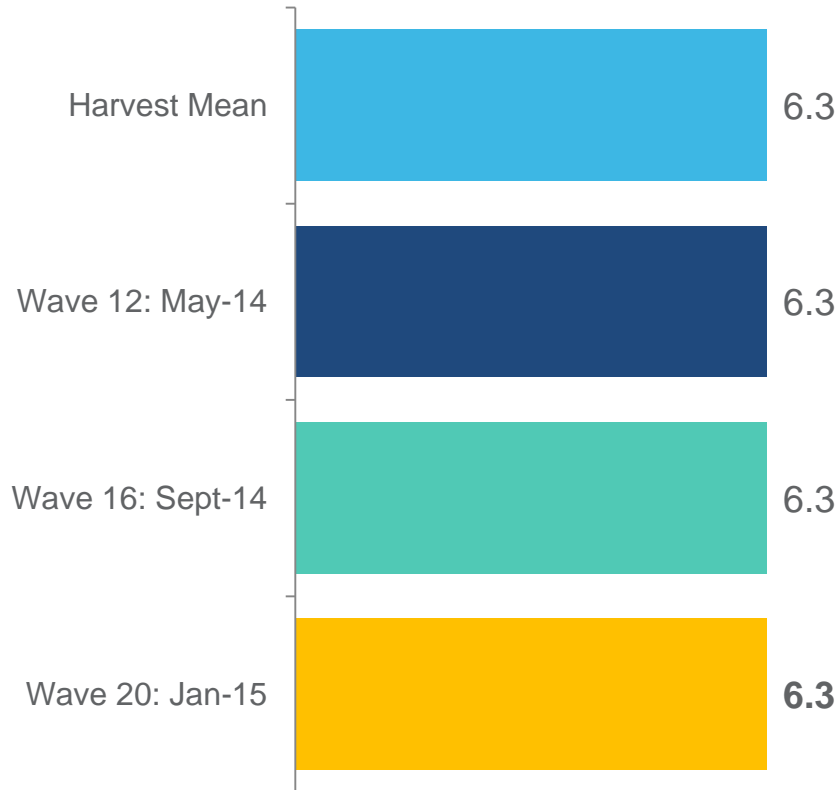
Top 10 Cooking Styles			
	Wave 12	Wave 16	Wave 20
Stir frying	84%	79%	80%
Steaming	47%	41%	44%
Soup	20%	23%	23%
Boiling	15%	19%	18%
Blanche	16%	13%	16%
Sautéing	20%	24%	16%
Raw	10%	12%	13%
Shallow frying	12%	9%	12%
Microwave	12%	11%	9%
Stewing	8%	6%	5%

Sample Wave 12, N=305, Wave 16, N=303, Wave 20, N=317  
 Q9. How do you typically cook <commodity>?  
 Q10a. And when are you serving <commodity> which of the following do you also serve together with this?





Importance of provenance is steady across months and in line with the Harvest mean, indicating consumers are interested in where Asian vegetables are grown.



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

Q14. When purchasing <commodity>, how important is Provenance to you?  
Sample Wave 12, N=305, Wave 16, N=303, Wave 20, N=317



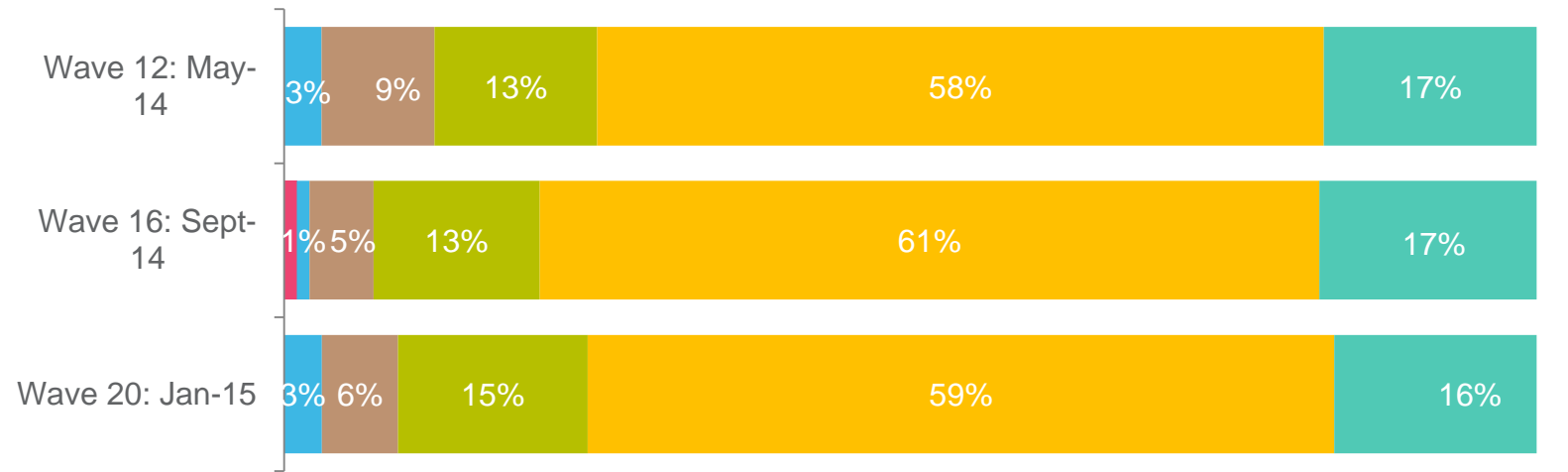
➔➔➔➔➔ Freshness has remained relatively stable and largely unaffected by seasonal changes.

Consumers expect Asian vegetables to stay fresh up to five days once purchased.

Expected to stay fresh for 5.7 days

- ▲ 5.9 days, Wave 12
- ▲ 5.9 days, Wave 16

### Expectations Met



■ Never met  
 ■ Rarely met  
 ■ Met some of the time  
 ■ Met half of the time  
 ■ Met most of the time  
 ■ Always met

Sample Wave 12, N=305, Wave 16, N=303, Wave 20, N=317  
 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> ?



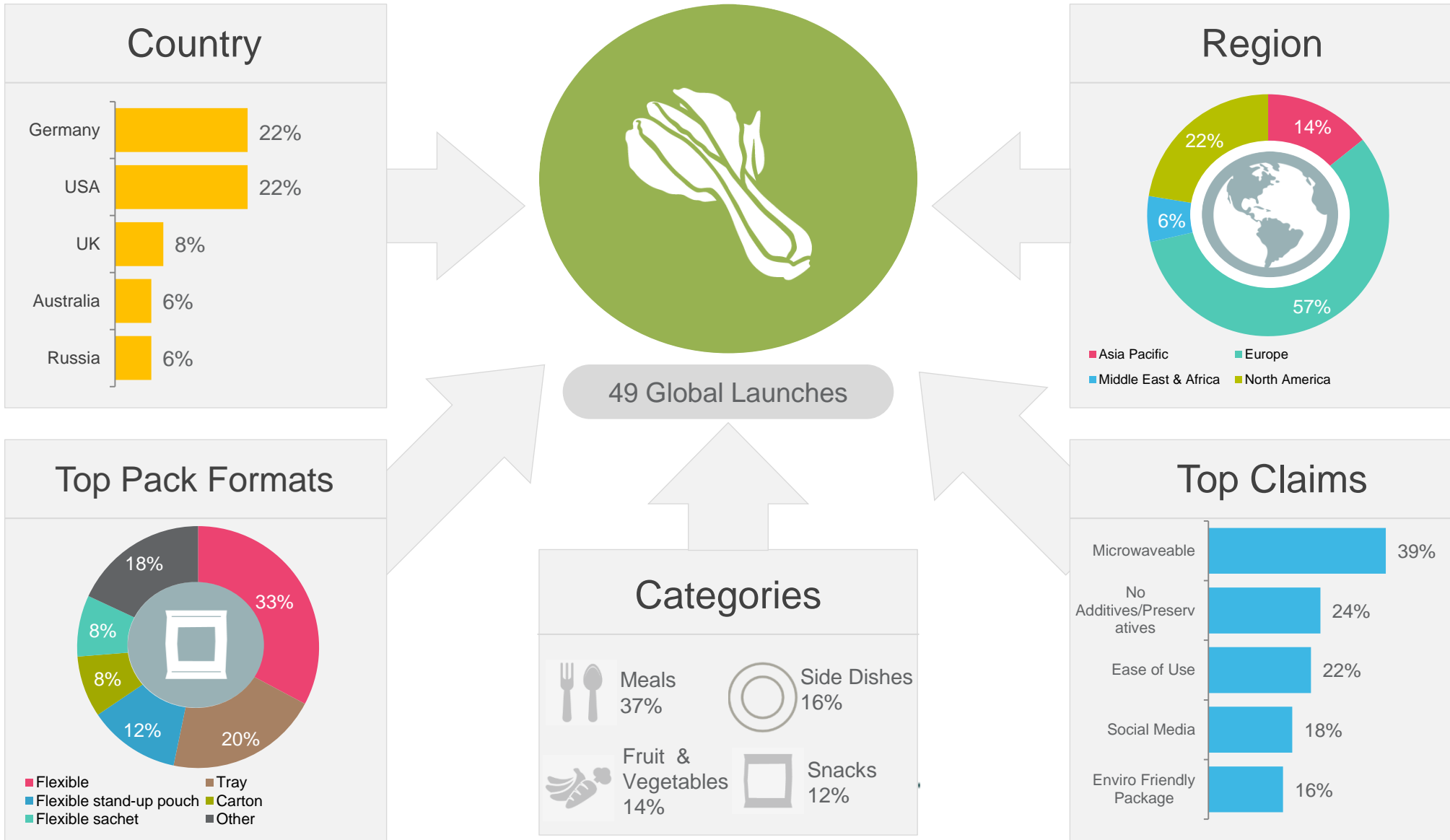
# Trends: Asian Vegetables



# Asian Vegetables Global NPDs

## November 2014 – January 2015

There were 49 launches in the last three months that contained Asian Vegetables as an ingredient. Products are primarily launched in Europe and North America regions. The main categories for launches are meals, side dishes and fruit and vegetables.





# Asian Vegetables Product Launches: Last 3 Months (November 2014 – January 2015) Summary

- There were 49 products launched over the last three months that contained Asian Vegetables as an ingredient.
- In Australia there were three products launched, most were meal products including a meal kit and salad.
- Europe (57%) and North America (22%) were the main regions for launches.
- Flexible formats remained the most common type of packaging (33%), followed by trays (20%).
- The top category launches were meals (37%), side dishes (16%) and fruit and vegetables (14%).
- Popular claims used were around convenience, including microwavable (39%), ease of use (22%), consistent with previous trends. No additives/preservatives was also commonly used (24%).
- The most innovative Asian Vegetable product was the Asian nutty slaw, launched in the UK (examples can be found in the following pages).



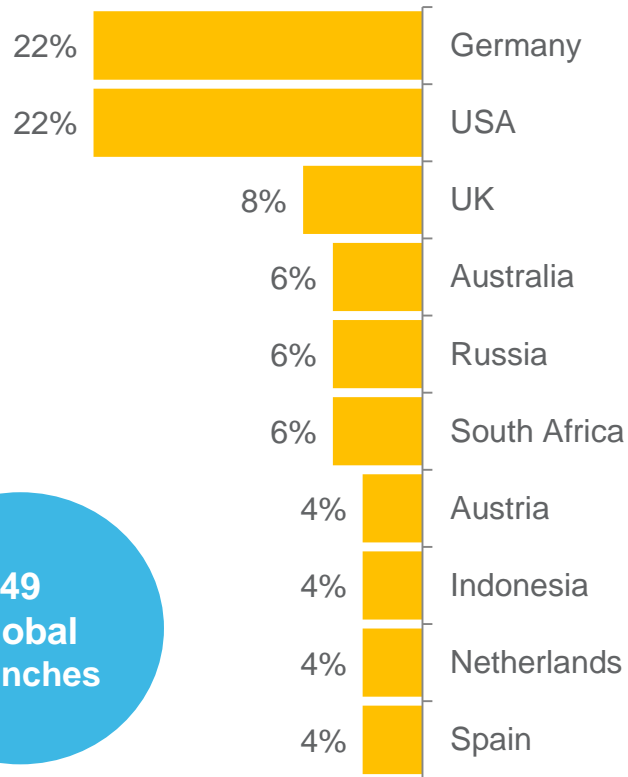
Source: Mintel (2014)



# Asian Vegetables Country & Category Launches

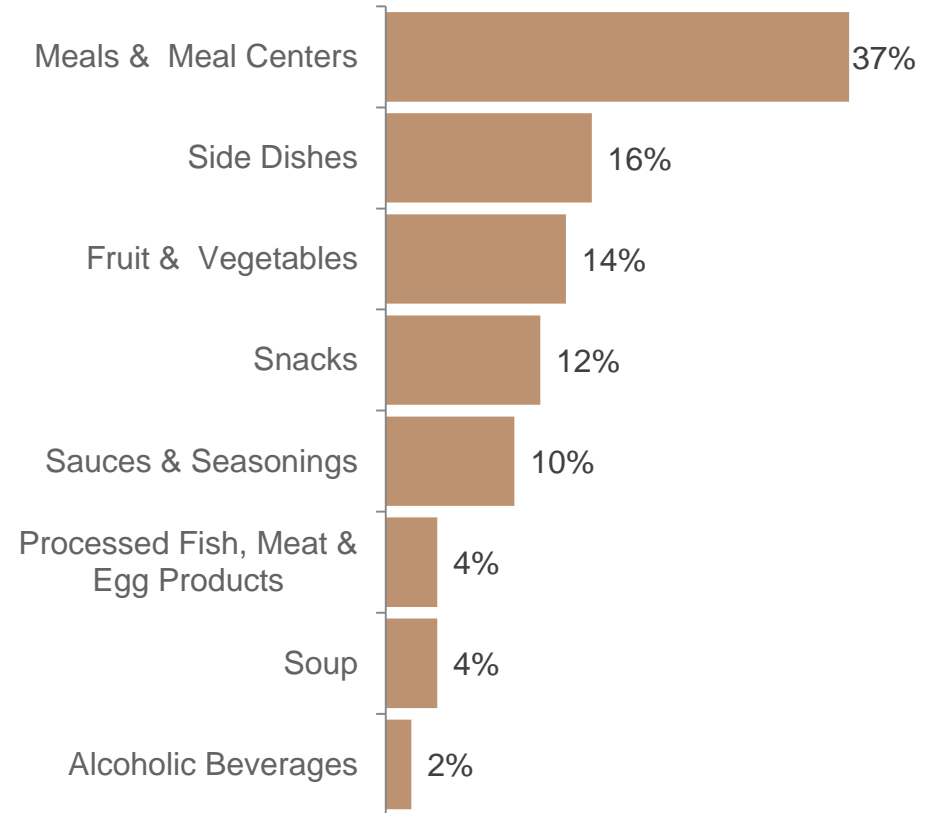
Germany and USA are key countries for launches. The main category for Asian Vegetable products are meals.

### Top Launch Countries



49  
Global  
Launches

### Top Launch Categories



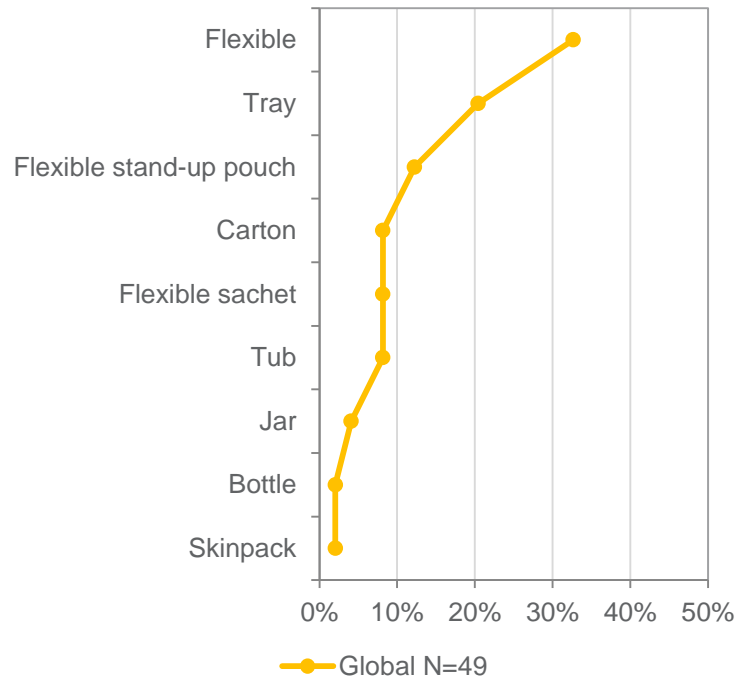


# Key Claims & Pack Formats

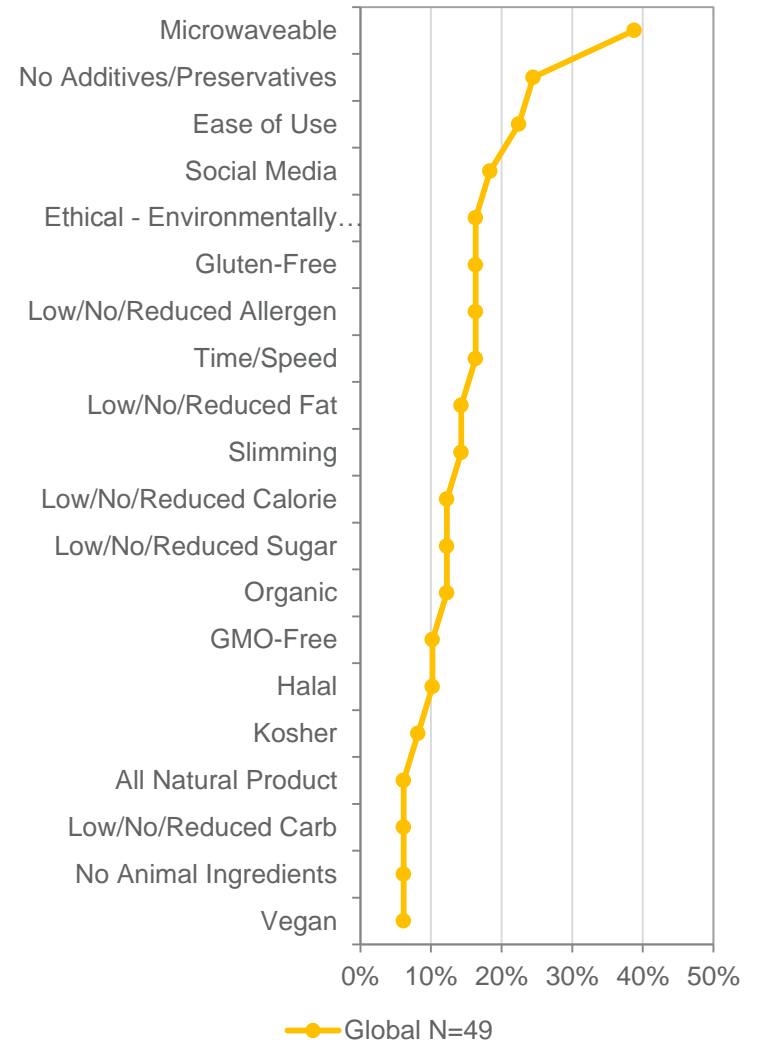
Flexible formats and trays are the main packaging formats used over the last three months.

Products utilise convenience claims - microwavable and ease of use as well as no additives/preservatives to communicate health.

### Pack Formats



### Product Claims



Only regions with n >30 are displayed



# Innovative Asian Vegetables Launches: L3M (November 2014 – January 2015)

## Asian+ Nasi Goring Rice Meal (Denmark)

Asian+ Nasi Goreng Risret (Nasi Goring Rice Meal) is made following an Indonesian recipe using traditional and fresh ingredients including fried rice with pork, egg and chopped vegetables that have been prepared in a wok. The product can be microwaved and retails in an 800g pack sufficient for two to three people.



**Claims:**  
Microwaveable

## O Organics Organic Asian Mix (USA)

O Organics Organic Asian Mix has been repackaged in a newly designed resealable 5-oz. recycled pack. It is a mix of authentic Asian greens, baby spinach and baby kale that have been triple washed and ready to eat. The USDA organic certified product meets the highest standards for no GMOs.



**Claims:**  
Ease of Use, Organic, Ethical - Environmentally Friendly Package, GMO-Free, Convenient Packaging

## Padifood Chinese Sweet Chilli Chicken with Cantonese Rice (Netherlands)

Padifood Chinese Kip Sweet Chili met Kantoneze Rijst (Chinese Sweet Chilli Chicken with Cantonese Rice) is now available. The microwaveable product is part of the authentic Asian cuisine and comprises tender chicken strips in a sweet and spicy chilli sauce with Cantonese rice, egg and vegetables.



**Claims:**  
Ethical - Environmentally Friendly Package, Microwaveable

## Weight Watchers zum Aufgabeln Asian Pasta Salad (Germany)

Weight Watchers zum Aufgabeln Nudelsalat Asia (Asian Pasta Salad) is now available. This salad contains noodles with sweet and sour wok vegetables, and is free from flavour enhancers, sweeteners and flavours. This product just needs to be opened and mixed, is worth eight ProPoints and is available in a 250g pack serving one portion and including a fork.



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





# Innovative Asian Vegetables Launches: L3M (November 2014 – January 2015)

## Waitrose Asian Nutty Slaw (UK)

Waitrose Asian Nutty Slaw comprises crunchy vegetables with cashew nuts and a chilli and ginger dressing. This product is suitable for vegetarians and retails in a 125g pack.



**Claims:**  
Vegetarian

## P.F. Chang's Home Menu Vegetable Mini Egg Rolls (USA)

P.F. Chang's Home Menu Vegetable Mini Egg Rolls are made with cabbage, carrots and onions and come with a Signature sauce packet. This appetizer for two can be served in minutes and is claimed to bring the perfect Asian dining experience home. The microwavable product retails in an 8.8-oz. pack containing eight units and featuring the Facebook logo.



**Claims:**  
Social Media, Time/Speed, Microwaveable

## Kajnok Slim Konjac Penne Pasta Substitute (Germany)

Kajnok Penne Slim Nudelähnliches Erzeugnis aus Konjac (Slim Konjac Penne Pasta Substitute) is now available. It is made with 97% water and 2.7% vegetable fibre glucomannan of konjac root, which is used since millennia in Asian cuisine as an ingredient in light and healthy cooking. This gluten-free substitute does not contain fat or sugars and is low in calories.



**Claims:**  
Low/No/Reduced Allergen, Low/No/Reduced Calorie, Low/No/Reduced Fat, Low/No/Reduced Sugar, Slimming, Gluten-Free

## Woolworths Food Fresh & Creamy Peanut & Coconut Chicken Curry (South Africa)

Woolworths Food Fresh & Creamy Peanut & Coconut Chicken is made with Asian style noodles baby tatsoi/spinach, carrot ribbons and sweetcorn. It contains no added preservatives and may be served as a main meal with extra vegetables added. The microwavable product retails in a 950g partially recyclable pack that serves three to four.



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



# Innovative Asian Vegetables Launches: L3M (November 2014 – January 2015)

## Woolworths Food CarbClever Fresh Thai Red Chicken Curry (South Africa)

Woolworths Food CarbClever Fresh Thai Red Chicken Curry is an Asian favourite with a fresh seasonal vegetable stir fry. It contains no rice, pasta or potato, and is designed for carb conscious consumers. The microwaveable product retails in a 340g partly recyclable pack.



**Claims:**  
Seasonal, Vegetarian, Ethical -  
Environmentally Friendly Package,  
Low/No/Reduced Carb, Microwaveable

## Vier Diamanten Salatsnack Asian Style Tuna Salad (Austria)

Vier Diamanten Salatsnack Thunfisch Asiatisch (Asian Style Tuna Salad) is made with line-caught tuna, red peppers, baby corn, water chestnuts, rice and ginger. The tuna has been caught dolphin-safe with maximum by-catch reduction. This ready-to-eat, on the go product is suggested with bread or green salad as a quick snack.



**Claims:**  
Ease of Use, Time/Speed, On-the-Go,  
Ethical - Animal

## Rb BEHR Gemüsegarten Mini Pak Choi (Germany)

Rb BEHR Gemüsegarten Mini-Pak Choi (Mini Pak Choi) is an Asian delicacy which is very versatile in the kitchen, and is can be served either cooked or raw in mixed salads. The product retails in a 300g pack.



**Claims:**  
N/A

## Auchan Pause Snack Noodles with Vegetables & Chicken (France)

Auchan Pause Snack Nouilles Légumes Poulet (Noodles with Vegetables & Chicken) can be microwave heated in two minutes thirty seconds. The product retails in a 300g pack that includes a plastic fork and serves one.



**Claims:**  
Microwaveable



# Australian Innovative Launches: L3M (November 2014 – January 2015)

## Five Tastes Nasi Goreng Meal Kit

Five Tastes Nasi Goreng Meal Kit contains no artificial colours, flavours, preservatives, or added MSG. It just requires the addition of bacon, chicken strips, spring onions, eggs, carrot and peanut oil. Nasi Goreng is a classic fried rice dish served throughout Indonesia that is typically characterised by sweet soy sauce, garlic and chilli.



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

## Passage Foods Asian Master Asian Stock

Passage Foods Asian Master Asian Stock is now available. This product is said to add depth and flavour to Asian cooking and to make a great base for soups, stir-frys and hot-pots. This gluten-free product contains no added MSG, and retails in a 500ml pack featuring recipe suggestions.



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

## Houston's Farm Asian Salad with Crunchy Noodles

Houston's Farm Asian Salad with Crunchy Noodles includes cucumber, spring onion, carrot, radish, and Birch & Waite honey soy dressing. The product provides two servings of vegetables and retails in a 150g pack featuring a fork.



**Claims:**  
Cobranded



# Beetroot.

*This is the second wave of beetroot tracking*



Purchase and consumption of beetroot were higher this month, on average being eaten eight times per month.

There is a substantial increase in purchase from specialist retailers this month, Aldi purchase is also higher. This may be due to broader availability in retailers.

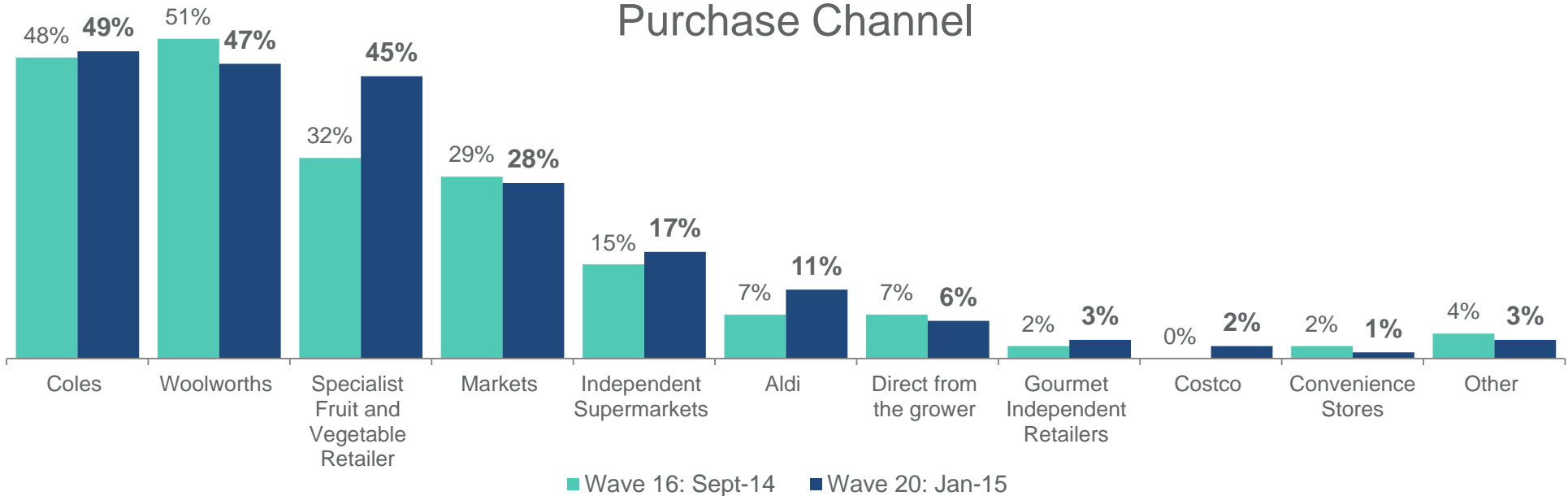


▼ 2.9 times, Wave 16



▼ 7.1 times, Wave 16

### Purchase Channel



Q1. On average, how often do you purchase <commodity>?  
 Q2. On average, how often do you consume <commodity>?  
 Q5. From which of the following channels do you typically purchase <commodity>?  
 Sample Wave 16 N=241, Wave 20 N=289



➔ An increase in weight of purchase and reduced last spend has lead to a positive increase in value perceptions.



Average weight of purchase

The average consumer typically purchases **1.0kg** of Beetroots.

▼ 0.9kg, Wave 16



Recalled last spend

The average recalled last spend is **\$4.30** in January 2015.

▲ \$4.70, Wave 16



Value for money

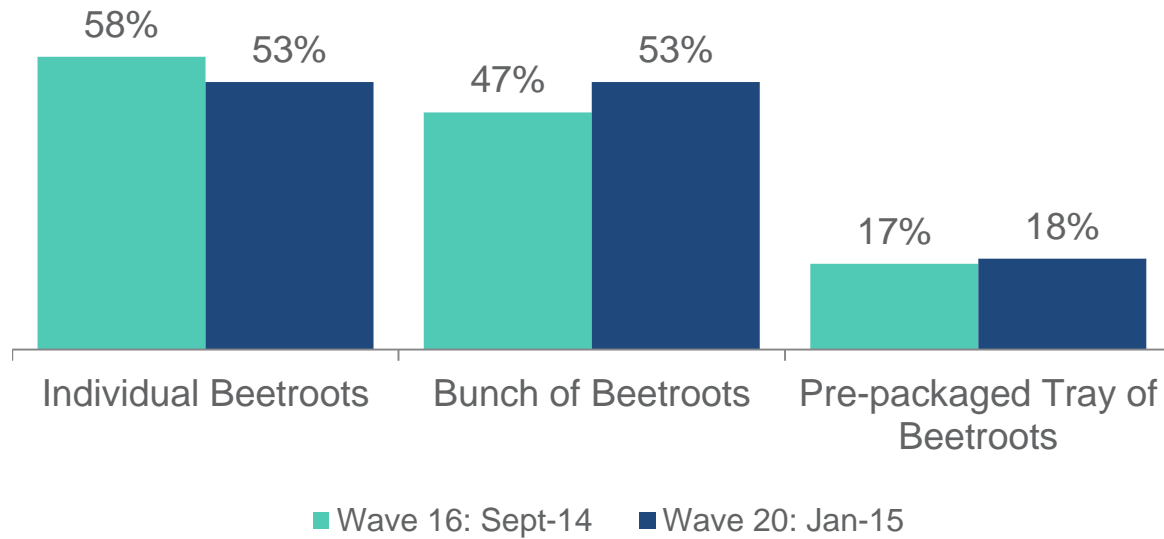
On average, consumers perceive Beetroot to be good value for money (**6.3/10**).

▼ 6.2/10, Wave 16

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



This month saw an increase in the purchase of beetroot bunches. Both individual and bunched beetroot formats appeal to consumers.



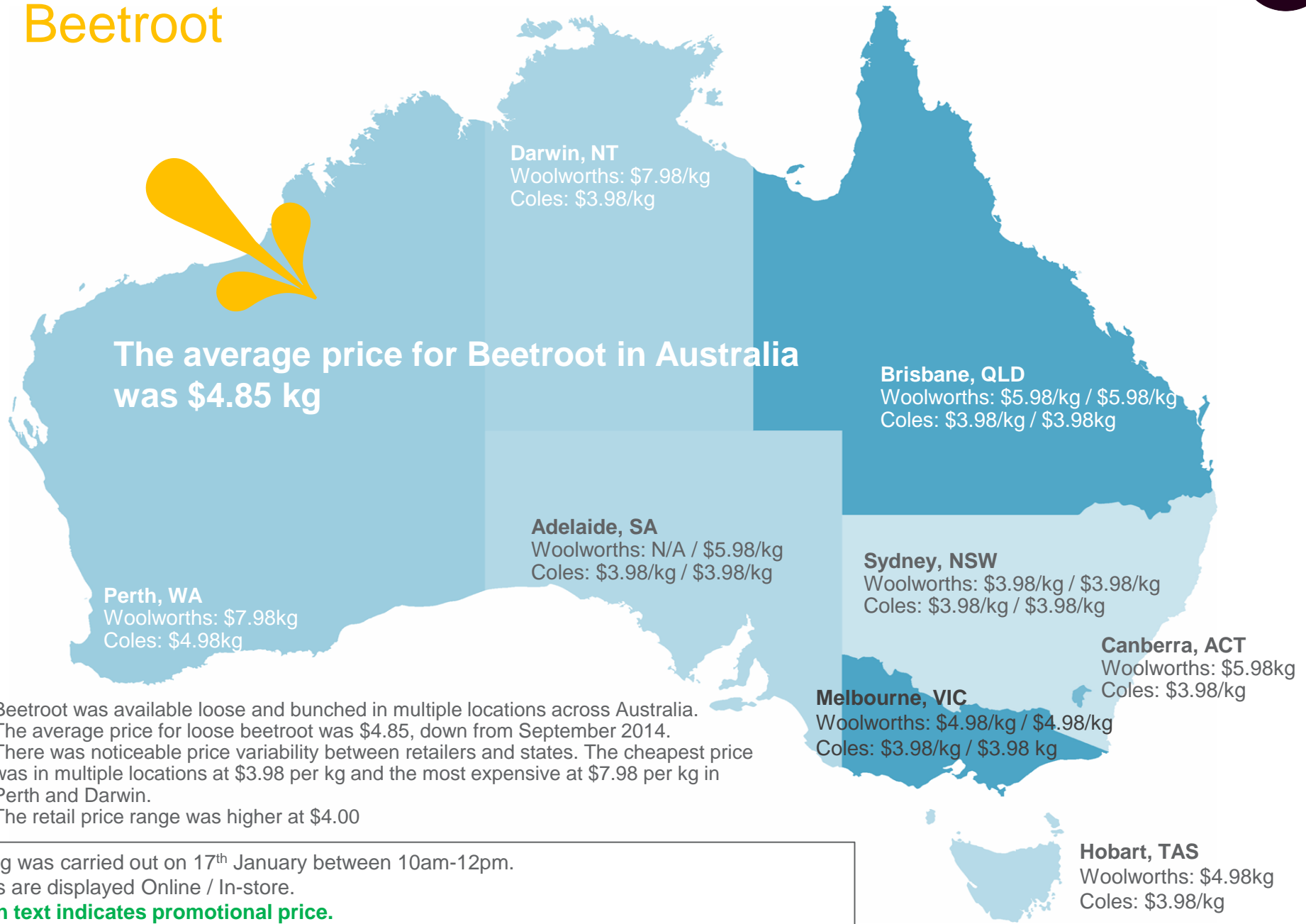
	Individual	Bunch	Pre-packaged
Wave 16	3.6	1.7	1.4
Wave 20	3.2	1.8	1.5



# Online and In-store Commodity Prices



## Beetroot



- Beetroot was available loose and bunched in multiple locations across Australia. The average price for loose beetroot was \$4.85, down from September 2014.
- There was noticeable price variability between retailers and states. The cheapest price was in multiple locations at \$3.98 per kg and the most expensive at \$7.98 per kg in Perth and Darwin.
- The retail price range was higher at \$4.00

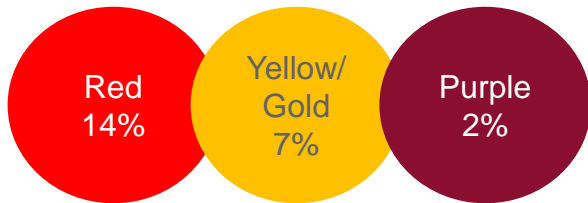
Pricing was carried out on 17<sup>th</sup> January between 10am-12pm.  
 Prices are displayed Online / In-store.  
**Green text indicates promotional price.**



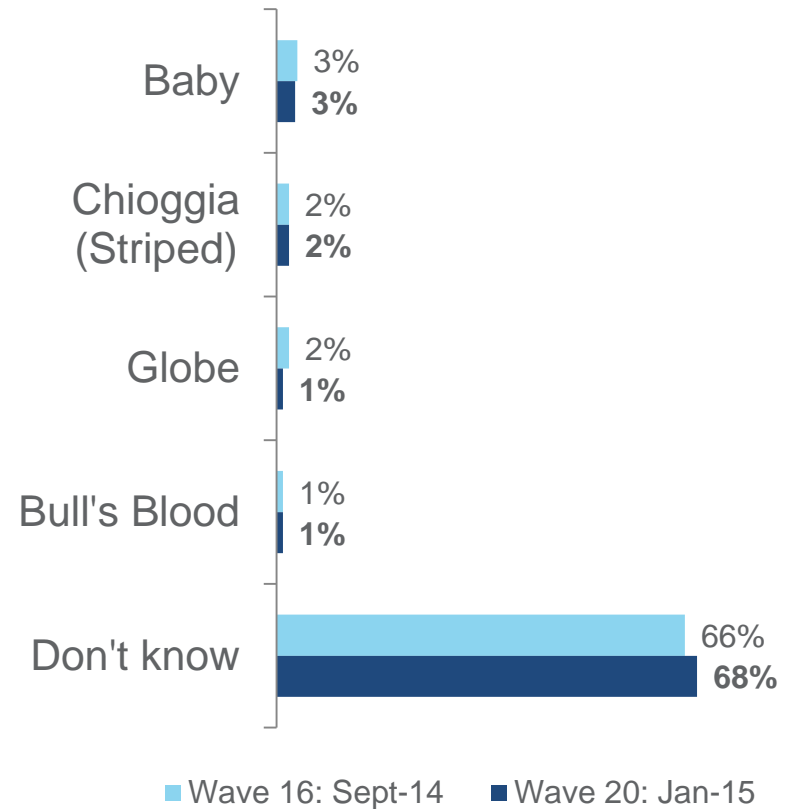


Awareness of beetroot varieties is consistently low across the two waves.

Colour remains the key differentiator and driver of recall.

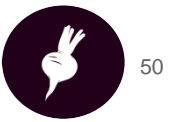


*"I did not know there are different varieties available to buy, they just look the same and I have not seen them sold as different varieties."*

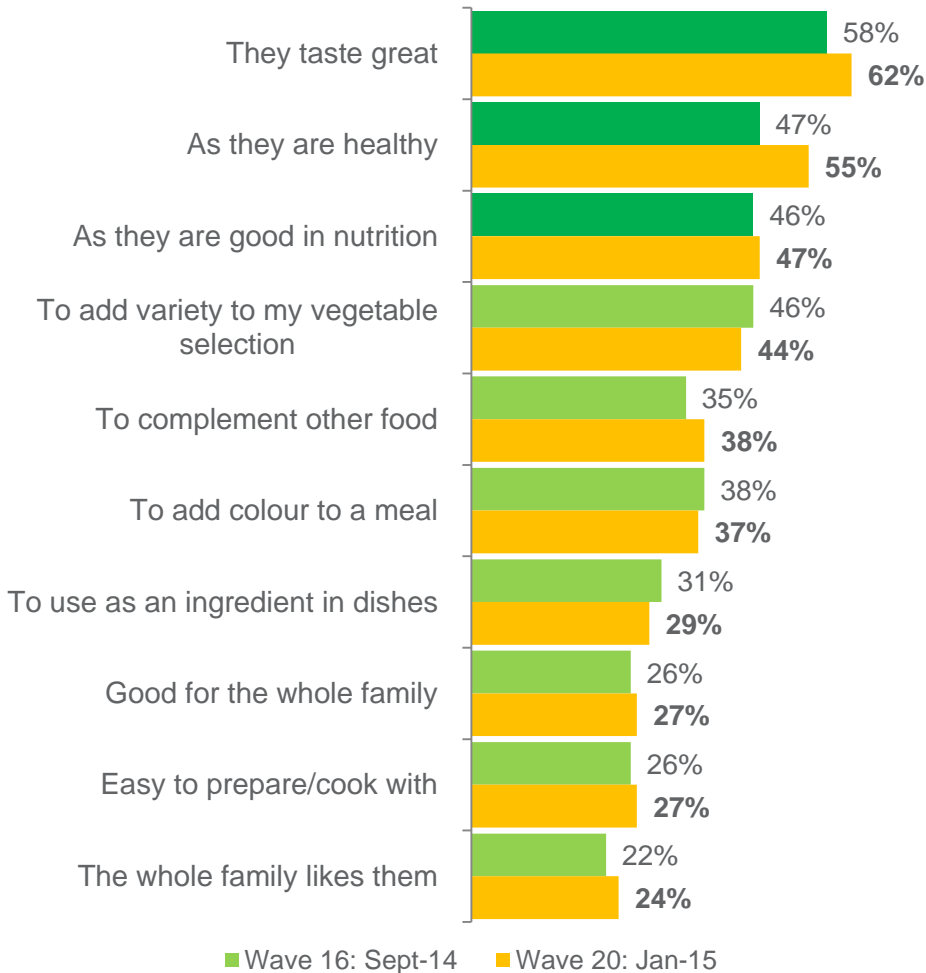




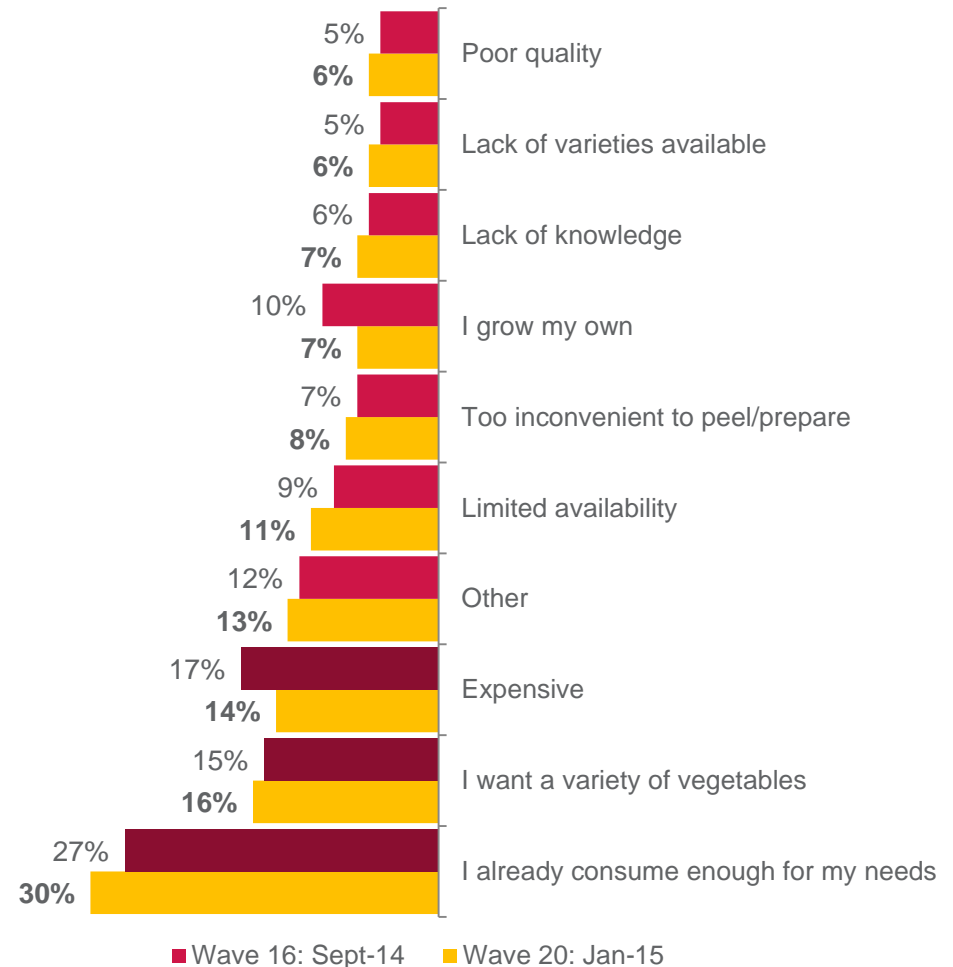
Consumers are purchasing Beetroot because they love the taste. Having enough for their needs and wanting variety are the key barriers to purchase.



### Triggers



### Barriers



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



This wave saw a large jump in cooking traditional Australian cuisine and snacking (antipasto) dishes.

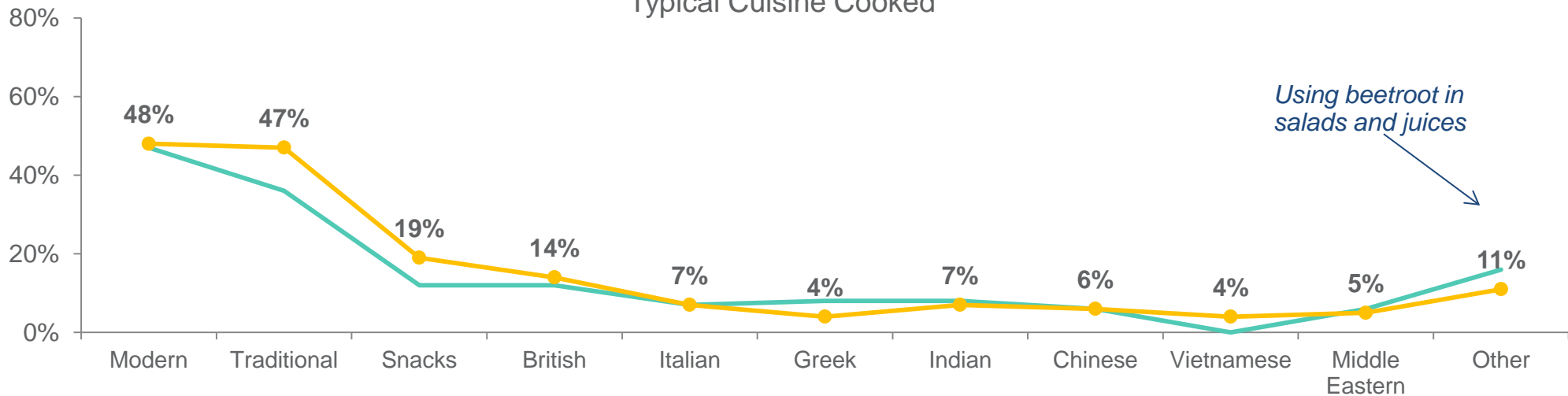
Consumption repertoire is limited to dinner and lunch occasions.

### Top 5 Consumption Occasions



	Wave 20	Wave 16
Weekday Dinner	40%	38%
Weekend Dinner	33%	28%
Weekday Lunch	28%	29%
Every-day	27%	27%
Weekend Lunch	27%	22%

Typical Cuisine Cooked



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



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

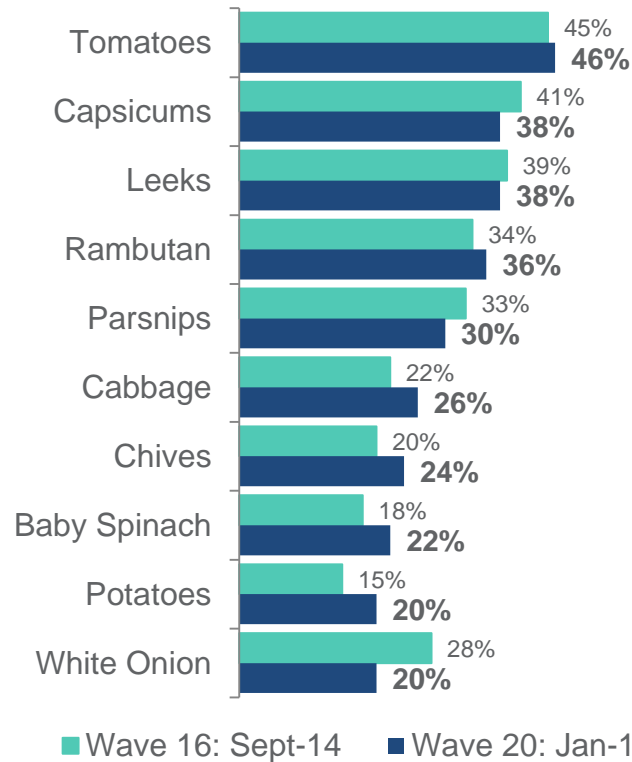


Nearly half of consumers are boiling beetroots, roasting and consuming raw are also popular cooking styles.



Consumers opt to serve beetroot with tomatoes, capsicums and leeks, in line with the last wave.

Top 10 Accompanying Vegetables

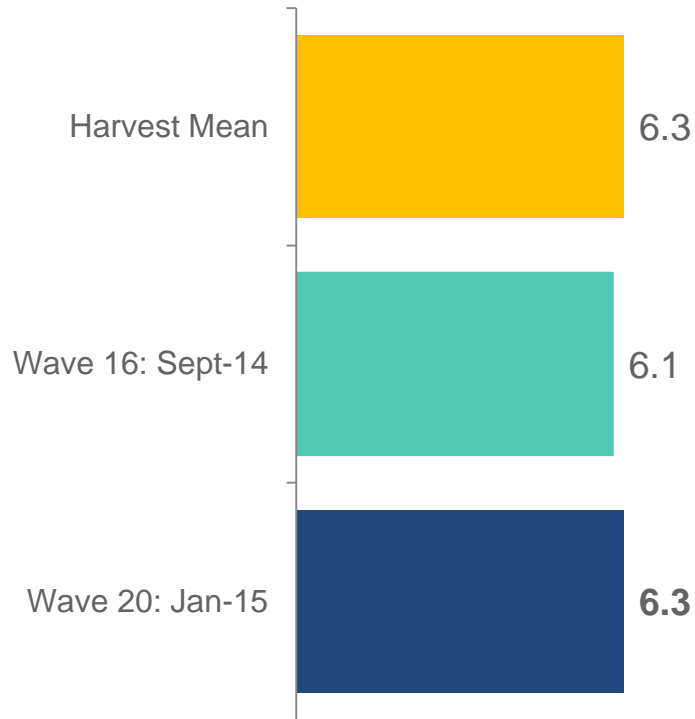


Top 10 Cooking Styles		
	Wave 16	Wave 20
Boiling	41%	46%
Roasting	33%	37%
Raw	27%	27%
Baking	17%	24%
Steaming	16%	15%
Other	12%	10%
Soup	12%	9%
Microwave	5%	8%
Stir frying	4%	7%
Stewing	8%	7%

Sample N=241  
 Q9. How do you typically cook <commodity>?  
 Q10a. And when are you serving <commodity> which of the following do you also serve together with this?



Importance of Beetroot provenance has increased since the last wave, now in line with the Harvest mean. Overall, consumers would like to know they are grown in Australia.



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

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



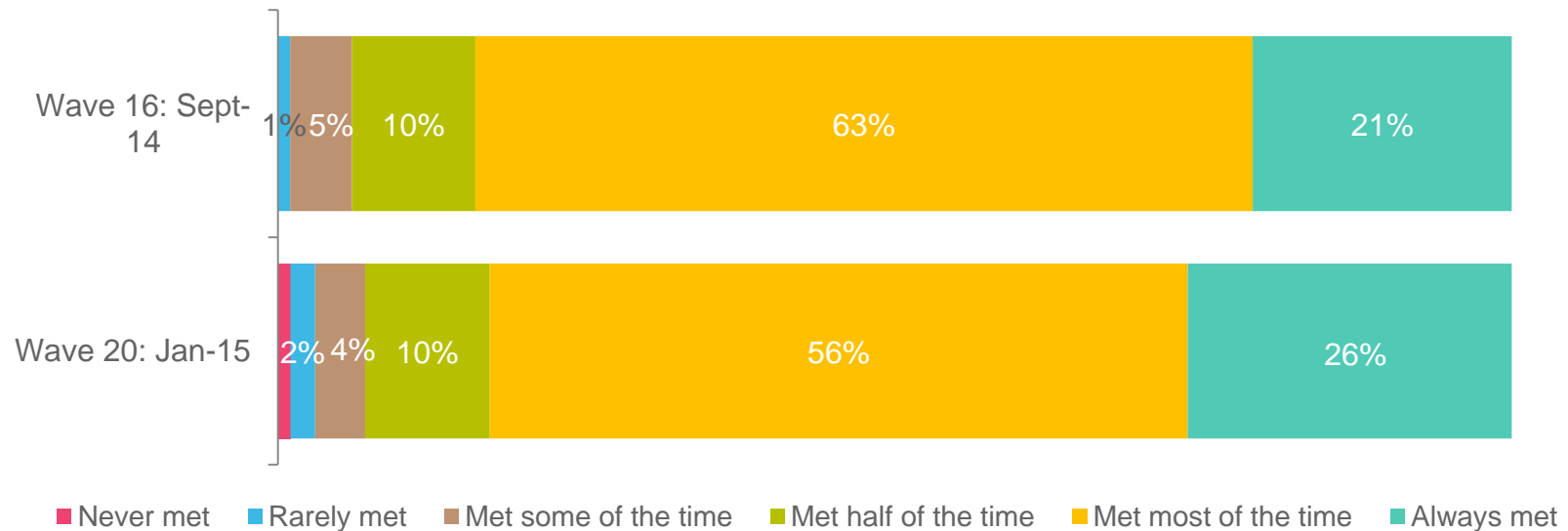
Consumers expect Beetroot to remain fresh for over 10 days once purchased.

There is a high likelihood that freshness expectations are being met at least most of the time.

Expected to stay fresh for 10.9 days

▲ 11.1 times, Wave 16

### Expectations Met



Sample N=241  
Q12. How long do you expect <commodity> to stay fresh for, once you have purchased it?  
Q13. How often is this length of freshness met when you buy <commodity> ?



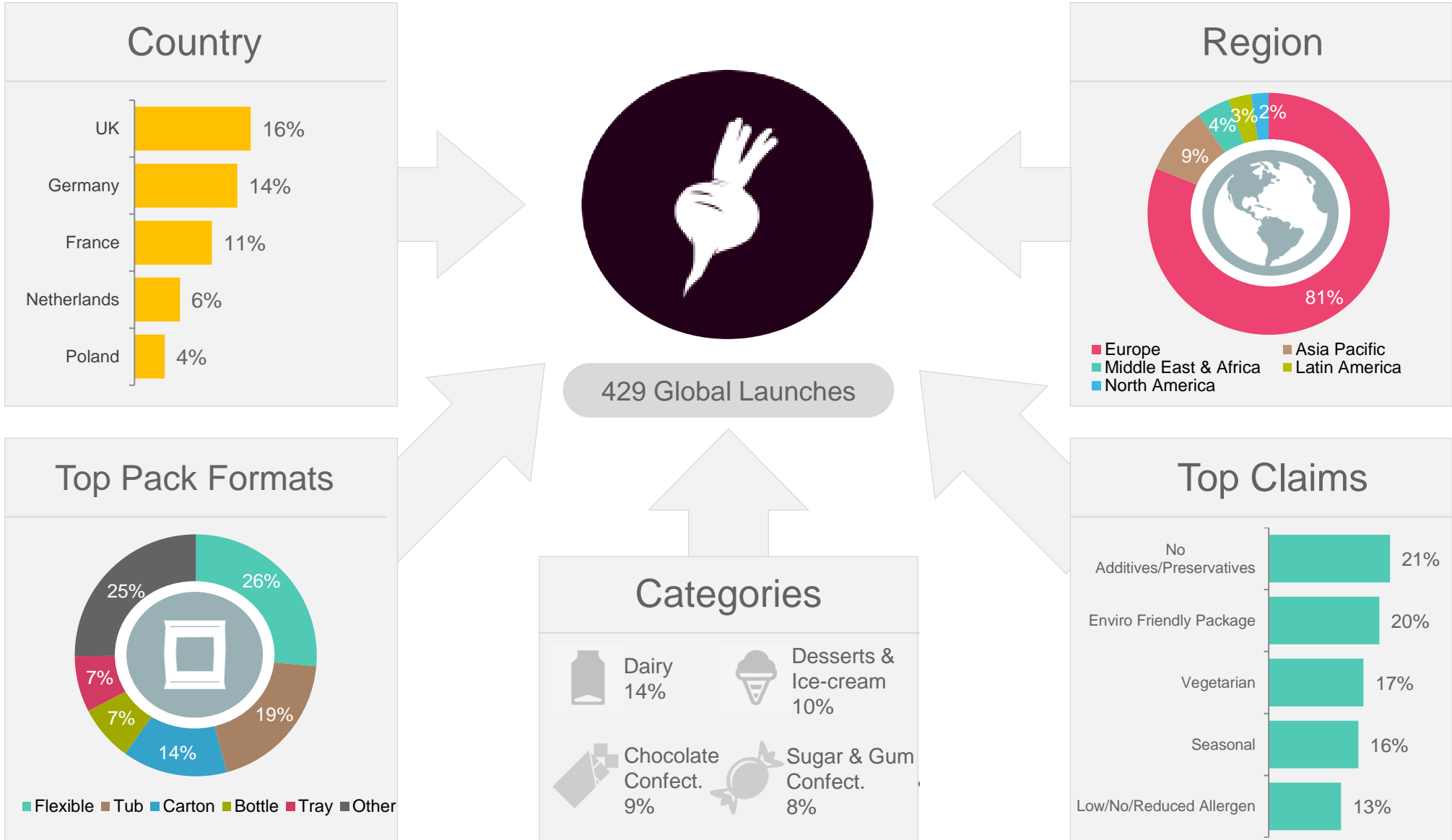
# Trends: Beetroot



# Beetroot Global NPDs

## November 2014 – January 2015

There were 429 products containing beetroot as an ingredient launched globally in the last three months. The majority of these launches occurred in Europe, in particular Germany and UK, which was consistent with past trends. Products were launched in dairy, desserts and confectionery categories. Health claims were frequently used on product labelling.







# Beetroot Product Launches: Last 3 Months (November 2014 – January 2015) Summary

- There were 429 global beetroot products launched globally over the last three months.
- There were nine products launched in Australia. A few of these products were dips and vitamin supplements.
- The majority of products were launched in Europe (81%). Key countries for launches were Germany (17%) and the UK (15%), consistent with previous trends.
- Flexible packaging was the most common format used (26%). Tubs were also common formats (19%).
- Top launch categories were Dairy (14%), Desserts and Ice-creams (10%) and Chocolate Confectionery (9%). It appears that beetroot is largely used as a colouring for desserts, ice-creams and dairy.
- Popular claims were around health and nutrition, including No additives/preservatives (21%), Vegetarian (17%) and Reduced allergen (13%), however the use of these claims has decreased since previous trends.
- The most innovative beetroot product launched was Beetroot and Fetta Sausages launched in the UK (examples of these can be found in the following pages).



Source: Mintel (2014)

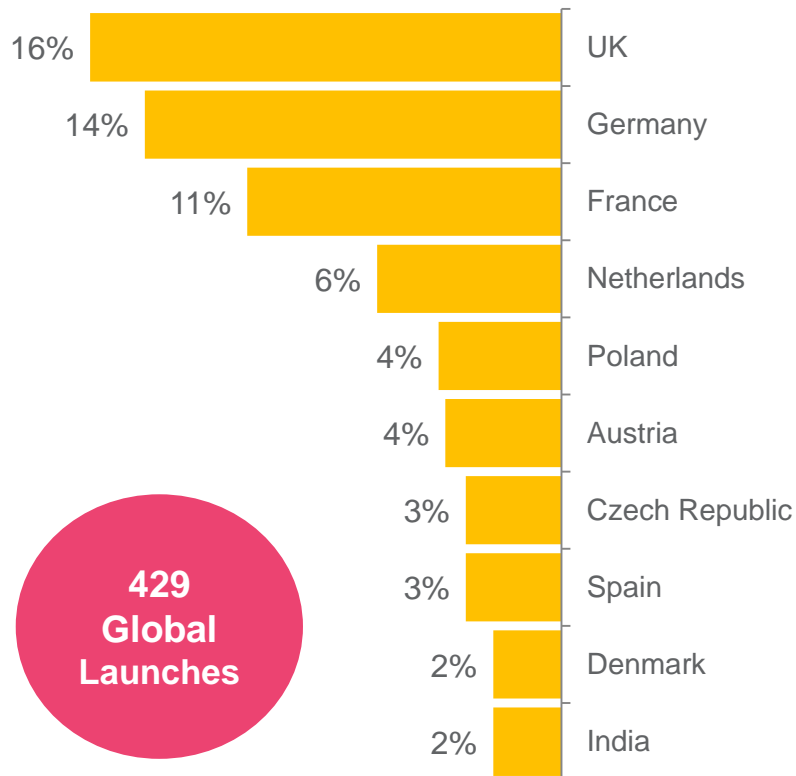




# Beetroot Launches

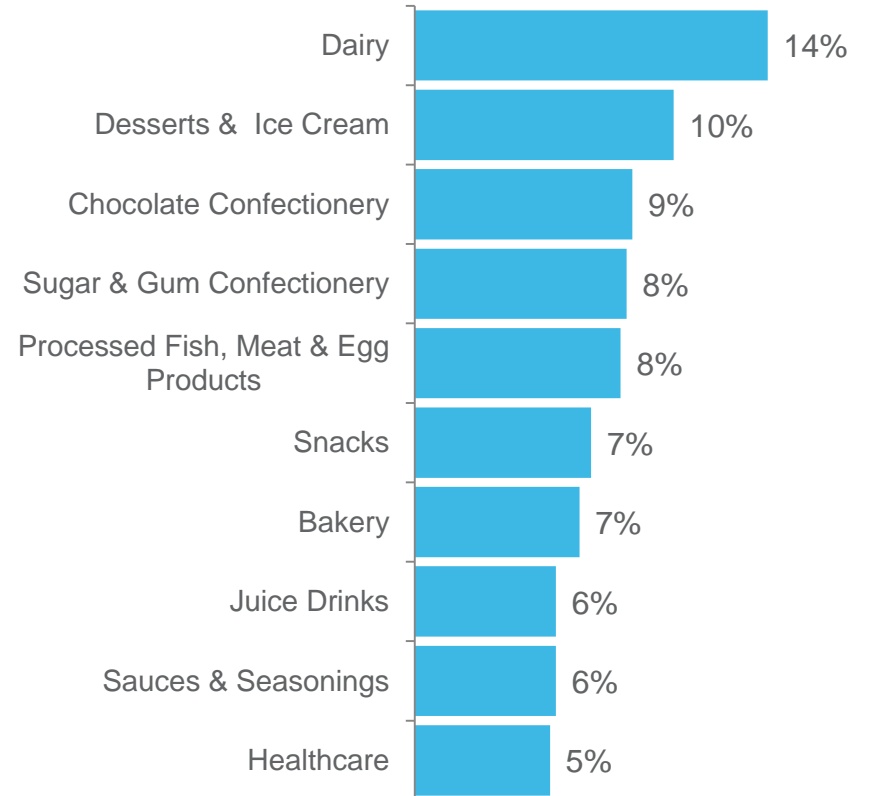
UK and Germany were the main countries for launches. Over the past three months dairy, desserts, ice cream and confectionery were the key categories for products launched.

### Top Launch Countries



**429**  
Global  
Launches

### Top Launch Categories

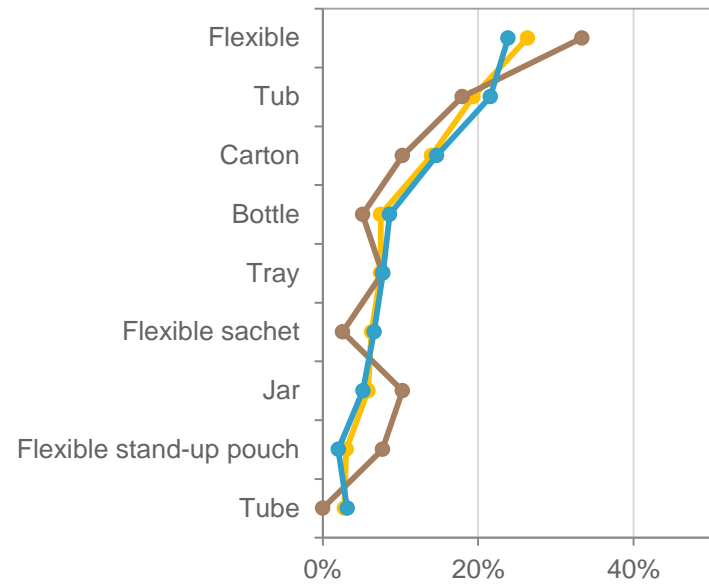


# »»» Claims & Pack Formats

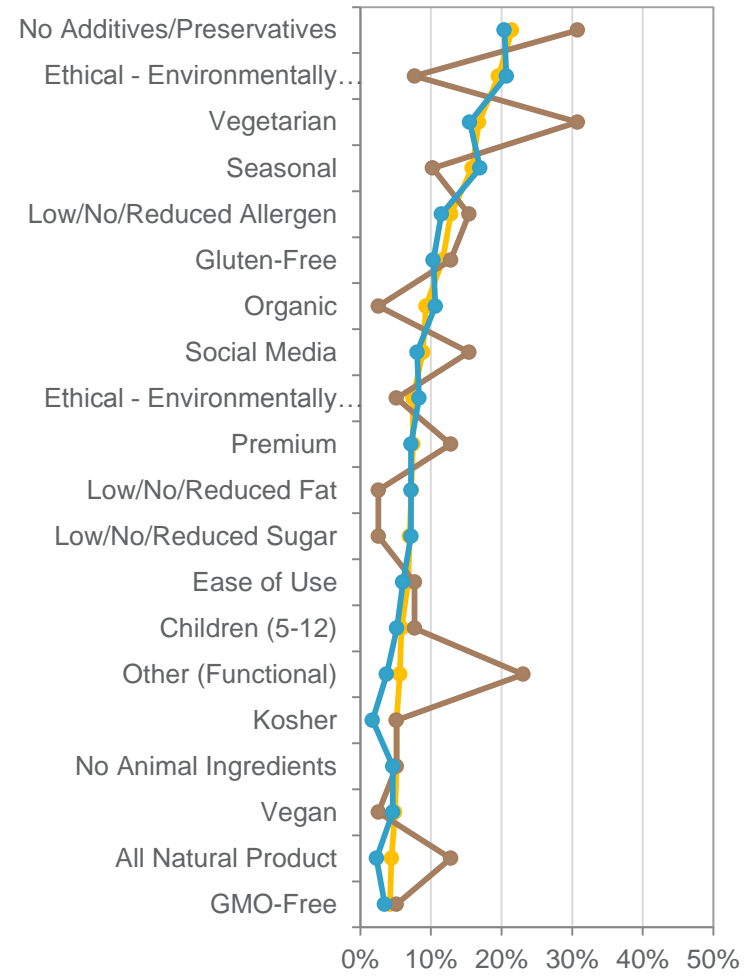
Flexible packaging and trays were the main formats used for products launched, consistent across regions.

No additives/preservatives was the key claim used, especially in Asia Pacific.

**Pack Formats**



**Product Claims**



—● Global N=429   
 —● Asia Pacific (N=39)   
 —● Europe (N=348)

Only regions with n >30 are displayed

# ➤➤➤ Innovative Beetroot Launches: L3M (November 2014 – January 2015)

## Herbal Hills Super Vegiehills Green Food Supplement (India)

Herbal Hills Super Vegiehills Green Food Supplement is made with organic ingredients. This vegetarian supplement contains ingredients that are dense in nutrients, vitamins, minerals and enzymes. The pure, natural product supports a healthy immune system.



**Claims:**  
Botanical/Herbal, Organic, Immune System (Functional), Vegetarian

## Mövenpick Limited Edition Oceania Meringue & Berries Pavlova Ice Cream (Russia)

Mövenpick Limited Edition Oceania Morozhenoye Plombir s Yagodnym Sousom, Beze v Belom Shokolade (Meringue & Berries Pavlova Ice Cream) comprise ice cream with 12% berries sauce and 5% meringue pieces in white chocolate. The product retails in a 900ml pack.



**Claims:**  
Limited Edition

## BioGourmet Beetroot & Horseradish Spread (Beetroot)

BioGourmet Rote Bete & Meerrettich Brotaufstrich (Beetroot & Horseradish Spread) is said to be deliciously fresh and can also be used as a dip. This organic certified, vegetarian product retails in a 130g jar.



**Claims:**  
Organic, Vegan, Vegetarian, No Animal Ingredients

## Picard L'Apéritif Rosebud Aperitif (France)

Picard L'Apéritif 9 Boutons de Rose Apéritifs (Rosebud Aperitif) is comprised of duck foie gras block and black cherry confit. The product can be prepared in an oven in 10-12 minutes and retails in a partly recyclable 108g pack, containing nine units.



**Claims:**  
Ethical - Environmentally Friendly Package

# »»» Innovative Beetroot Launches: L3M (November 2014 – January 2015)

## Premier Is Polar Bear Ice Cream Stick (Denmark)

Premier Is Isbjørn (Polar Bear Ice Cream Stick) consists of vanilla ice cream and strawberry ice cream with a gum ball. The product contains no artificial colours and retails in a 445ml pack containing five 89ml units.



**Claims:**  
No Additives/Preservatives

## Deluxe Red Wine Sauce (Spain)

Deluxe Salsa de Vino Tinto (Red Wine Sauce) is now available. This premium product retails in a 300ml pack.



**Claims:**  
Premium, Microwaveable

## Alnatura Beetroot Juice (Slovakia)

Alnatura Stava Z Cervenej Repy (Beetroot Juice) is fermented with lactic acid. The product is biodynamic certified by Demeter and retails in a 0.5L pack bearing the Bio7 Initiative for sustainability and the FSC logo.



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

## Soupologie Beetroot and Pomegranate Detox Boost Soup (Ireland)

Soupologie Beetroot and Pomegranate Detox Boost Soup contains beetroot to help detoxify chemicals and toxins in liver, pomegranate to work as antioxidants and pink Himalayan rock salt. This soup is a source of folate, fiber and vitamin C, and free from added sugar, GMO, gluten and lactose.



**Claims:**  
Low/No/Reduced Lactose, No Additives/Preservatives, Low/No/Reduced Allergen, Low/No/Reduced Cholesterol, GMO-Free, Vegan, Social Media, Low/No/Reduced Sugar, Microwaveable

# »»» Innovative Beetroot Launches: L3M (November 2014 – January 2015)

## Sugar & Spice Beetroot Lavash (India)

Sugar & Spice Beetroot Lavash is now available. The vegetarian product is retailed in a 60g pack.



**Claims:**  
Vegetarian

## Kühne Schlemmertöpfchen Beetroot Balls (Germany)

Kühne Schlemmertöpfchen Rote Bete Kugeln (Beetroot Balls) have been relaunched. This product is refined with red wine vinegar and retails in 520g jar.



**Claims:**  
N/A

## Milka Choco Jelly Milk Chocolate with Jelly Beans (Egypt)

Milka Choco Jelly (Milk Chocolate with Jelly Beans) contains cocoa dragées and fizzy granules. This product is made with 100% Alpine milk and retails in a 250g pack.



**Claims:**  
N/A

## Goodlife Beetroot & Feta Sausages with Roasted Fennel (UK)

Goodlife Beetroot & Feta Sausages with Roasted Fennel are made of beetroot, roasted onions, carrots, celery, fennel, Feta cheese, rehydrated bulgar wheat and couscous in a vegetable coating. They are made with natural ingredients and free from artificial colours and flavours.



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



# Australian Beetroot Launches: L3M (November 2014 – January 2015)

**Swisse Nutrients for the Skin Hydrate Anti-Ageing Face Moisturiser**



**N&C Nestle and Crush Cold Pressed E1 Balance Apple, Beetroot & Ginger Juice**



**The Pure Produce Company Beetroot & Fresh Dill Dip**



**Nature's Way Whole Foods Women's Multivitamin**



**Coles Australian Superfood Leaf Blend**



A close-up photograph of several sweetpotatoes with reddish-brown skin and some yellowish-orange spots. A large, dark grey circle is overlaid in the center of the image, containing the text 'Sweetpotato.' in white.

# Sweetpotato.

*This is the second wave of sweetpotato tracking*





Consumption is higher this wave, however purchase remained steady.

Consumers are more likely to shop at alternative retail channels (not mainstream) this month, including specialist retailers, markets and Aldi.

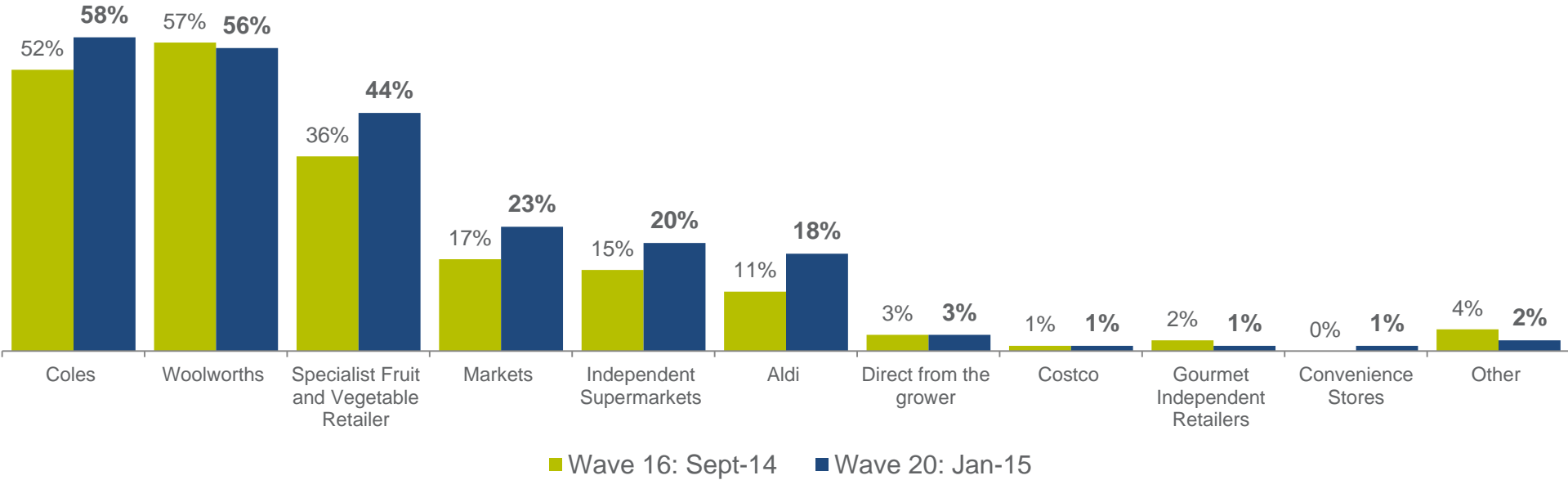


3.3 times, Wave 16



7.2 times, Wave 16

### Purchase Channel



Q1. On average, how often do you purchase <commodity> ?  
 Q2. On average, how often do you consume <commodity> ?  
 Q5. From which of the following channels do you typically purchase <commodity> ?  
 Sample Wave 1 N=311



Weight of purchase remained steady at 1.1kg, however last spend perceptions have increased. This has led to a slight decline in value for money expectations.



Average weight of purchase

The average consumer typically purchased 1.1kg of sweetpotatoes in January 2015.

— 1.1kg, Wave 16



Recalled last spend

The average recalled last spend was for sweetpotatoes was \$4.00.

▼ \$3.60, Wave 16



Value for money

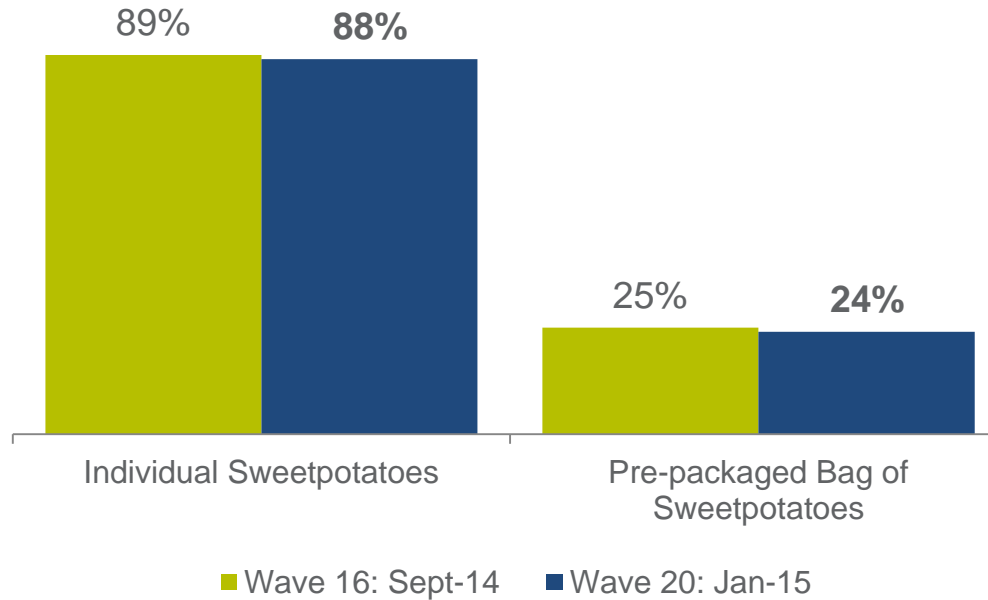
On average, consumers perceived sweetpotatoes to be good value for money (6.4/10).

▲ 6.5/10, Wave 16

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



The majority of consumers are purchasing individual sweetpotatoes, usually two per shop.



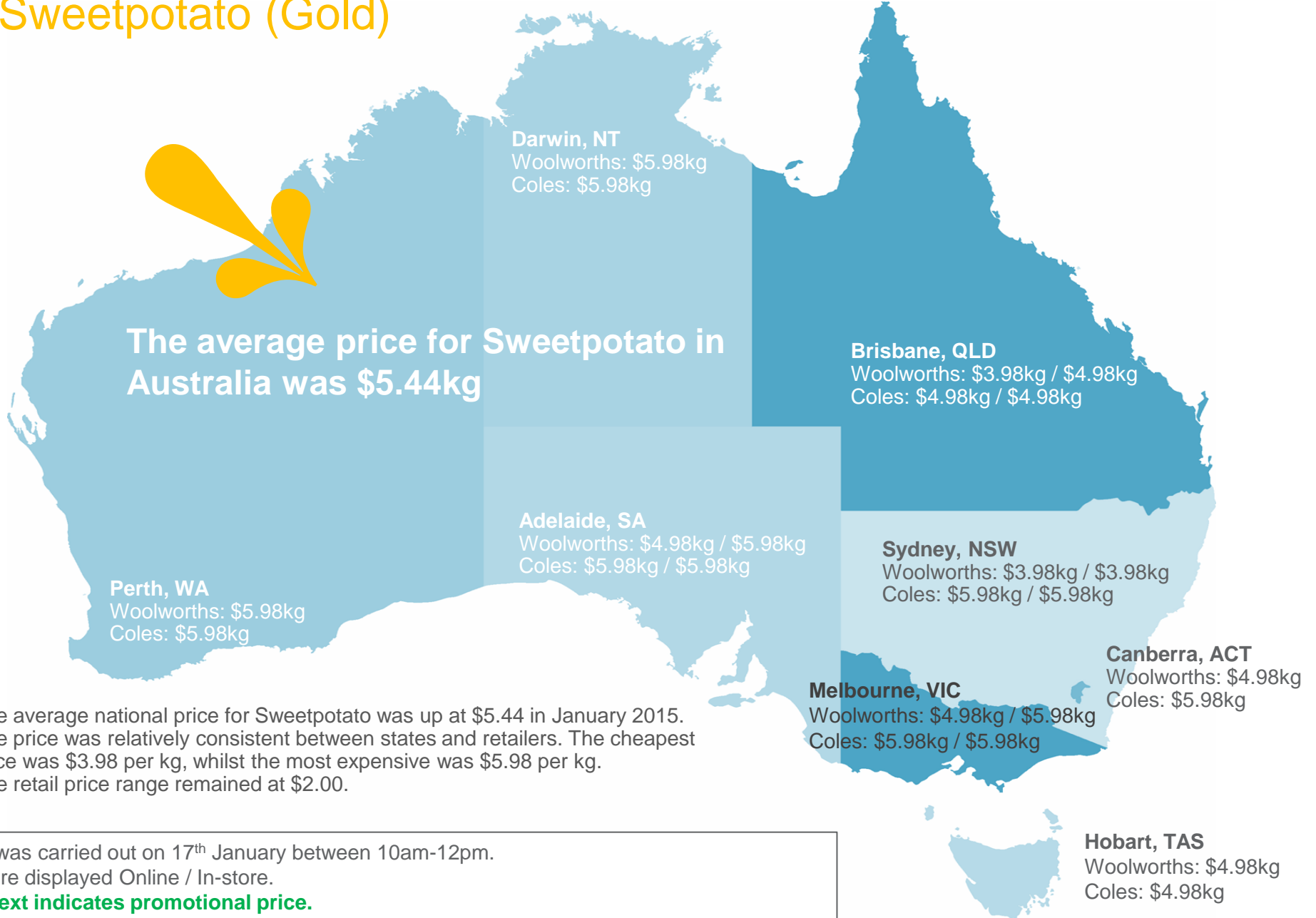
	Individual	Bag
Wave 16	2.6	1.8
Wave 20	2.6	1.9

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

# Online and In-store Commodity Prices



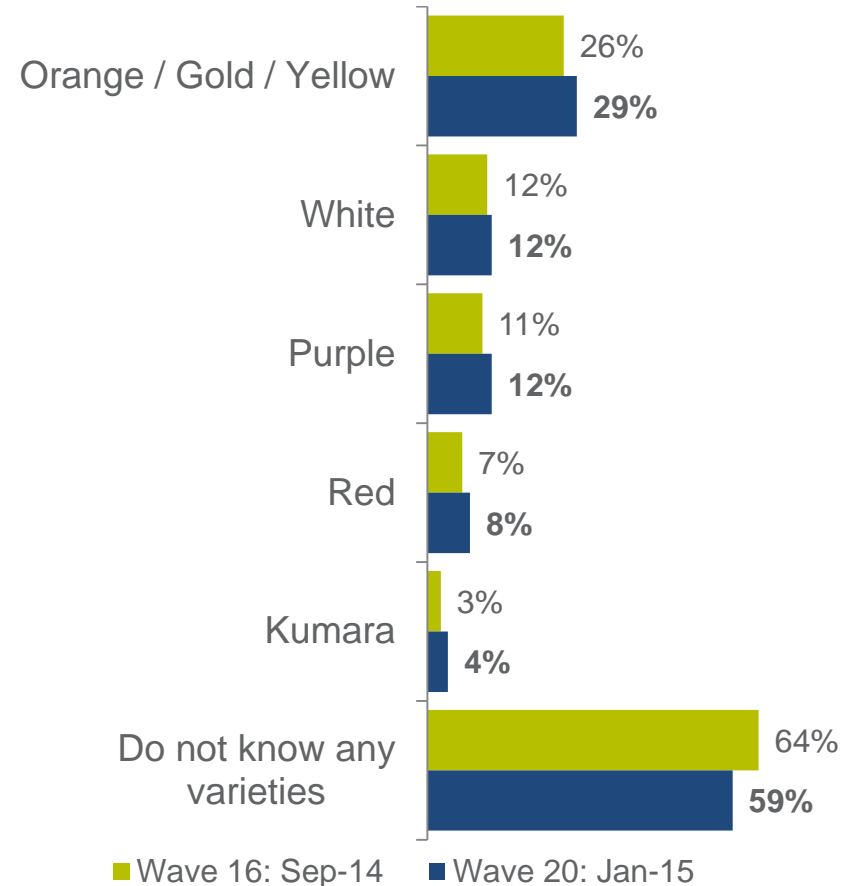
## Sweetpotato (Gold)





Colour remains the key driver of Sweetpotato recall, with a third of consumers able to recall the Gold variety.

There is a large number of consumers who are unaware of Sweetpotato types.

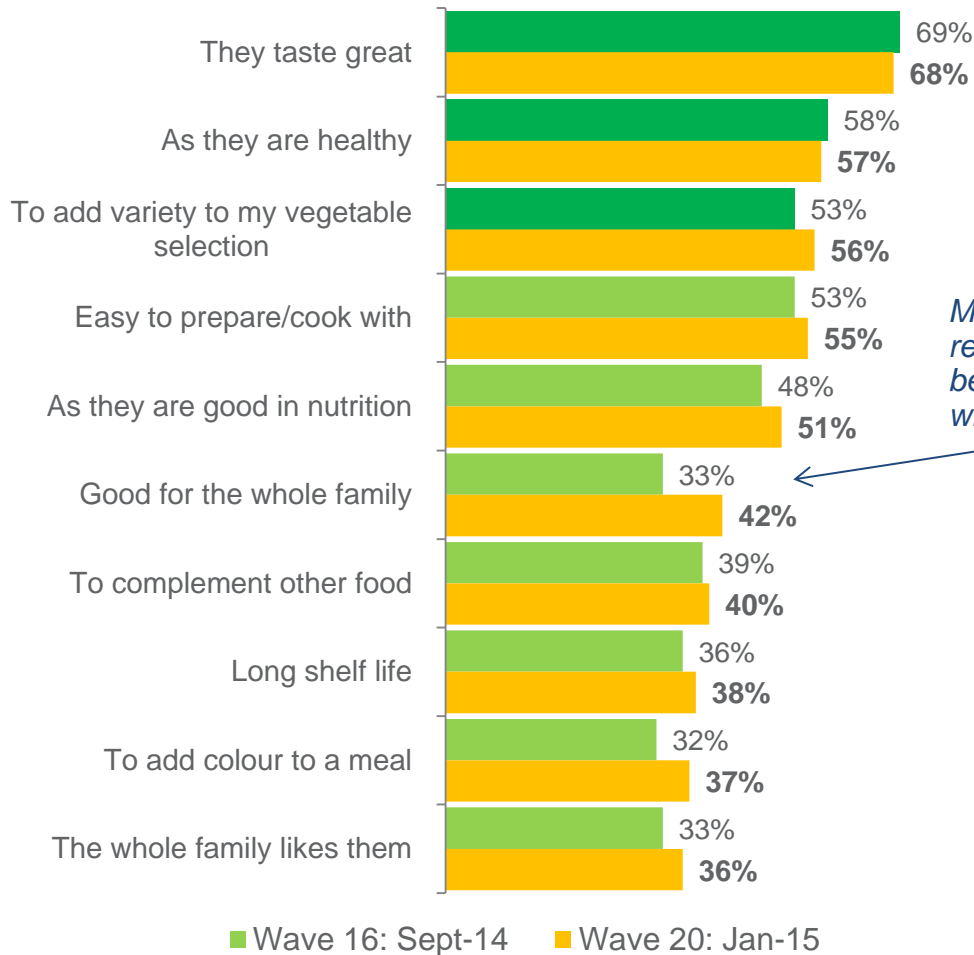




Taste and health are the key drivers for Sweetpotato purchase. Consumers perceive that they already consume enough Sweetpotato for their needs.

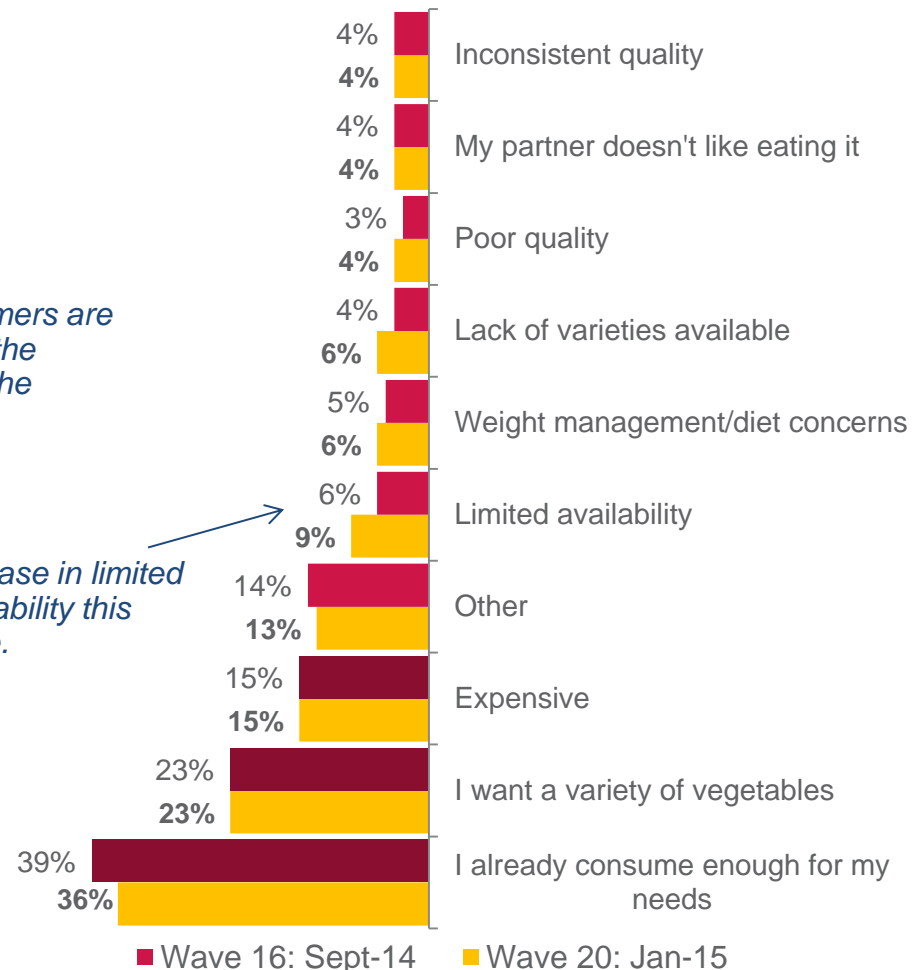


### Triggers



More consumers are recognising the benefits for the whole family.

### Barriers



Increase in limited availability this wave.

■ Wave 16: Sept-14   ■ Wave 20: Jan-15

Q7. Which of the following reasons best describes why you purchase <commodity> ?  
 Q8. Which reason best describes why you don't buy <commodity> more often?  
 Sample Wave 1 N=311



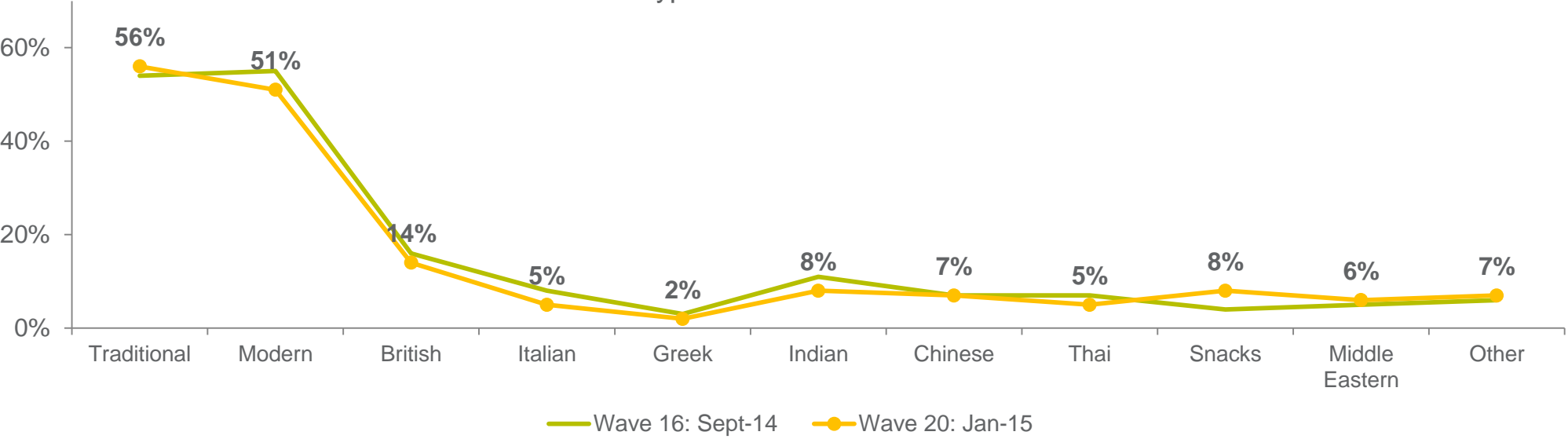
Sweetpotato cooking and consumption is heavily skewed towards Australian dinner occasions. Currently there is minimal cuisine repertoire for Sweetpotato.

**Top 5 Consumption Occasions**



	Wave 20	Wave 16
Weekday Dinner	62%	60%
Weekend Dinner	47%	44%
Family meals	39%	36%
Every-day	29%	32%
Quick Meals	19%	13%

Typical Cuisine Cooked

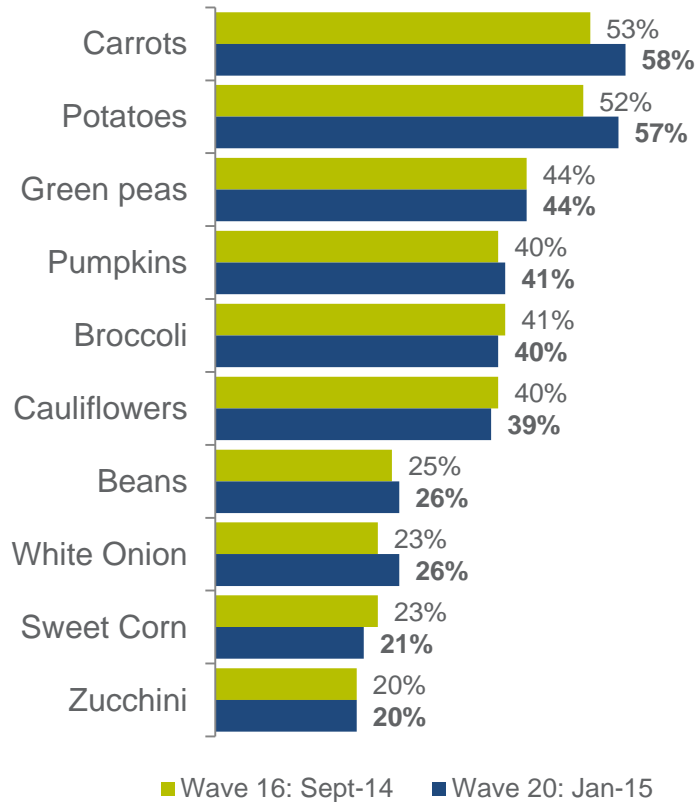


Q10. What cuisines do you cook/consume that use <commodity> ?  
 Q11. Which of the following occasions do you typically consume/use <commodity> ?  
 Sample Wave 1 N=311



Consistent with previous waves, consumers prefer to roast, bake and mash sweet potato. They are generally served with carrots, potatoes and green peas.

Top 10 Accompanying Vegetables



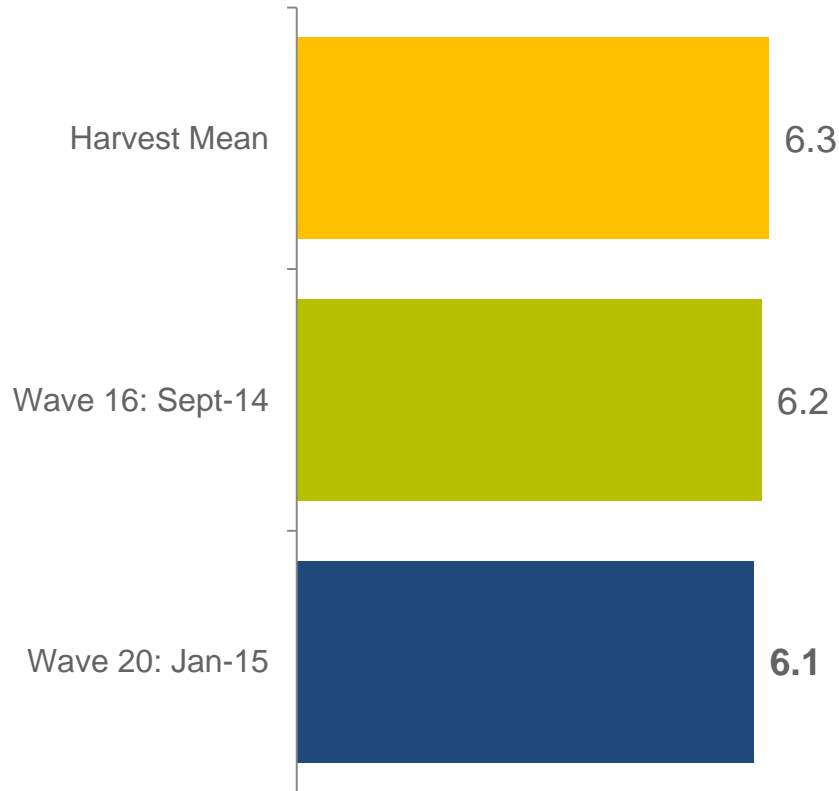
Top Cooking Styles		
	Wave 16	Wave 20
Roasting	61%	62%
Baking	45%	47%
Mashing	43%	46%
Boiling	32%	41%
Steaming	28%	29%
Soup	23%	26%
Microwave	13%	17%
Stewing	11%	15%
Shallow Frying	6%	11%
Stir frying	8%	8%

Q9. How do you typically cook <commodity> ?  
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?  
Sample Wave 1 N=311





Importance of Sweetpotato provenance has declined slightly and remains below the Harvest mean, indicating consumers do not value provenance as highly for this commodity.



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

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

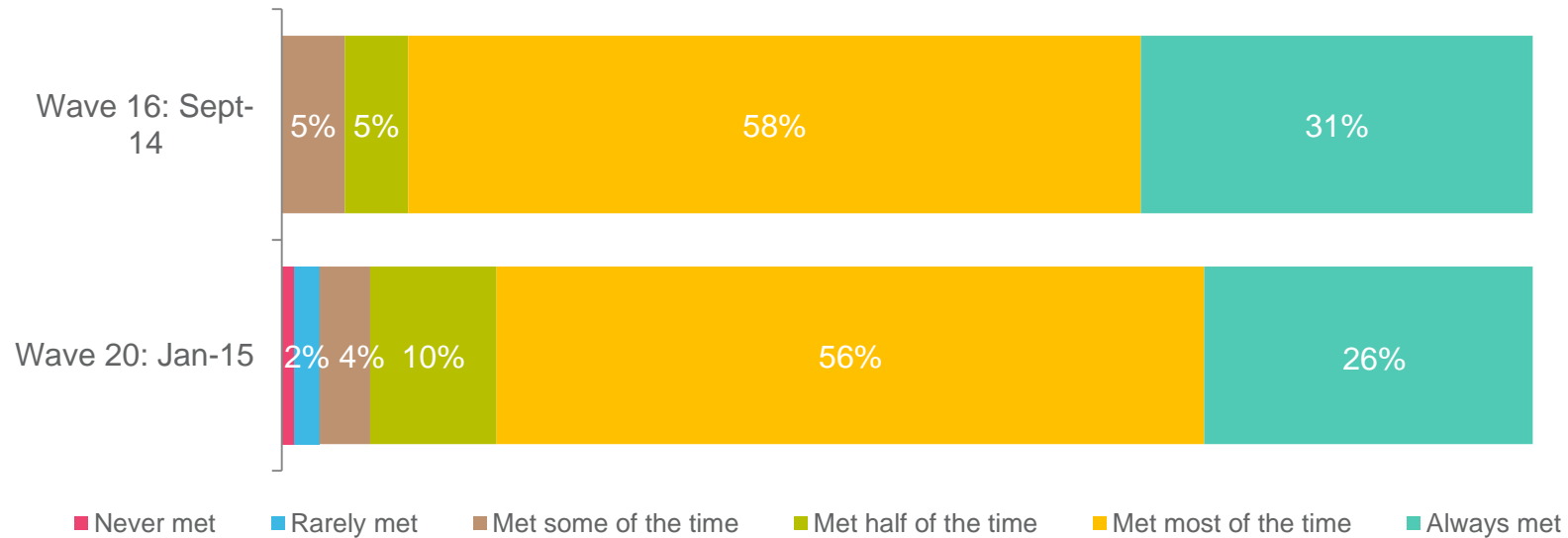


Freshness longevity and expectations have both fallen this month. Comparatively to other vegetables, Sweetpotatoes have a long shelf life once purchased of over 12 days.

Expected to stay fresh for **12.3 days**

▲ 13.1 days, Wave 16

### Expectations Met



Q12. How long do you expect <commodity> to stay fresh for, once you have purchased it?  
 Q13. How often is this length of freshness met when you buy <commodity> ?  
 Sample Wave 16 N=311, Wave 20, N=353



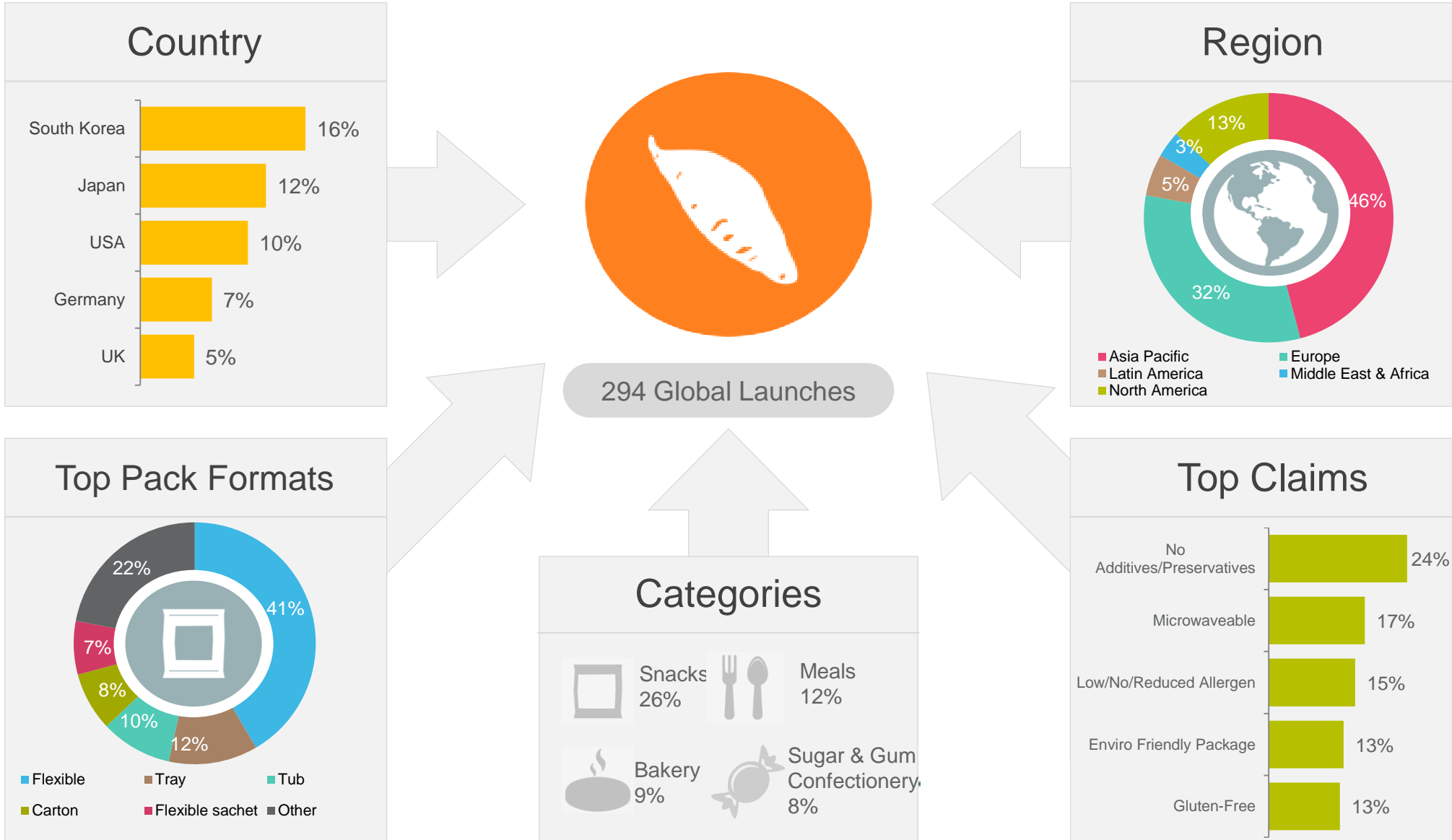
# Trends: Sweetpotato



# Sweetpotato Global NPDs

## November 2014 – January 2015

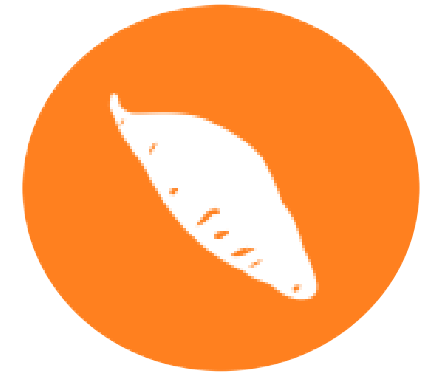
There were 249 global launches over the past three months that contained Sweetpotato as an ingredient. These were launched in Europe and Asia Pacific, particularly in China and USA. Key categories for launches were snacks, meals and bakery items.





# Sweetpotato Product Launches: L3M (November 2014 – January 2015) Summary

- There were 294 Sweetpotato products launched globally over the last three months.
- There were nine products launched in Australia, considerably higher than the three launches in July-September 2014. Products included dips and snack products.
- Products were predominately launched in Asia Pacific (46%) and Europe (32%).
- The main category launches were snacks (26%), meals (12%), and bakery items (9%).
- Common pack formats used were flexible packaging (41%), trays (12%) and tubs (10%).
- Popular claims used on products were No additives/preservatives (24%), microwavable (17%) and low/reduced/no allergen (15%).
- The most innovative products launched used incorporated sweet potato for snack foods, including Apple Sweet Potato Flavoured Corn Snacks in Canada and Roasted Sticky Sweet Potato in South Korea. A limited edition Purple Sweet Potato Kit Kat was launched in Japan. Other examples can be found on the following pages.



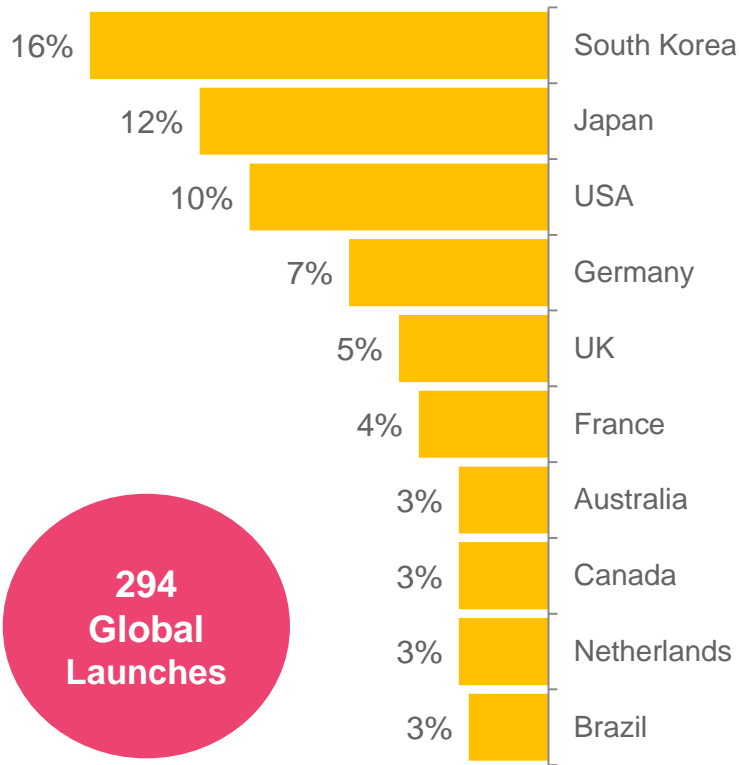
Source: Mintel (2014)



# Sweetpotato Launches

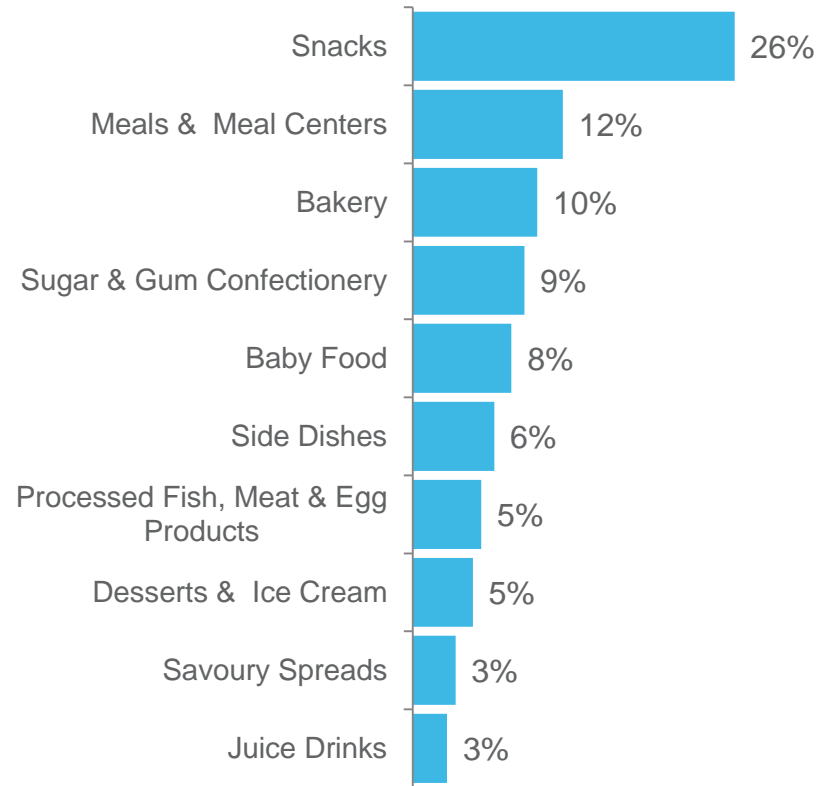
South Korea and Japan had the greatest number of sweetpotato product launches. The main category for products were snacks.

### Top Launch Countries



**294**  
Global  
Launches

### Top Launch Categories

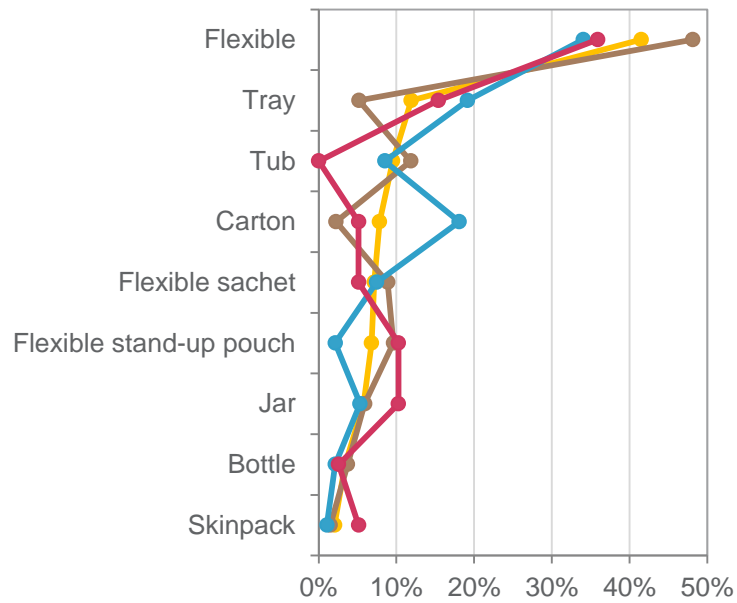




# Claims & Pack Formats

Flexible packaging was the main format used, consistent across regions. North America were more likely to utilise claims compared with other regions. No additives and preservatives was used most frequently on products.

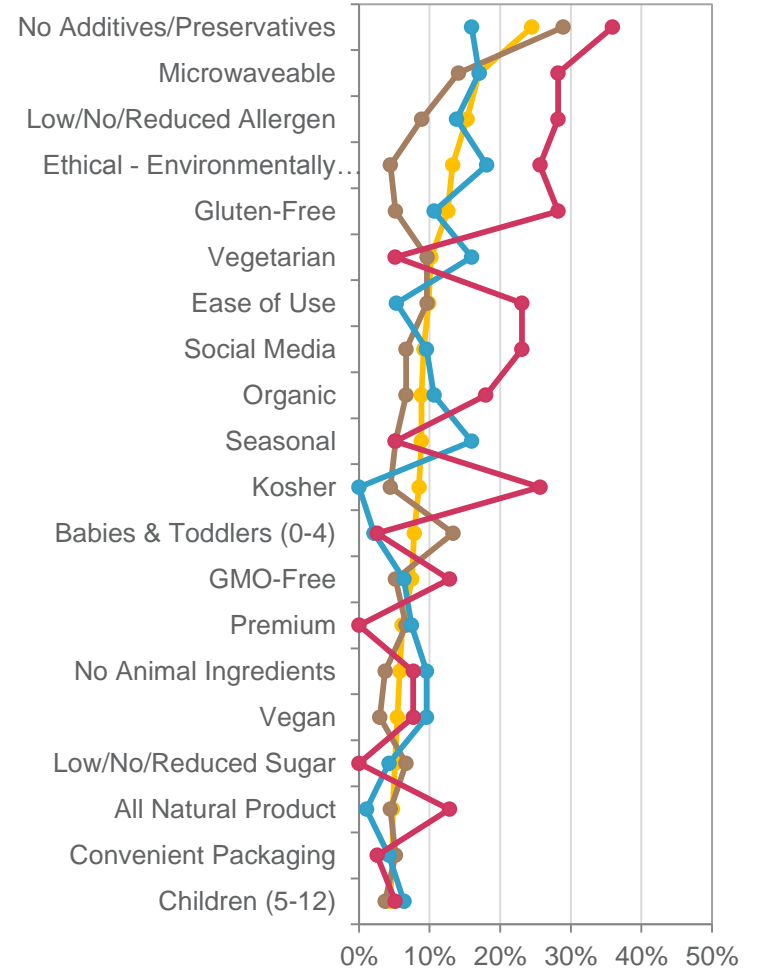
### Pack Formats



● Global (N=294)  
● Europe (N=94)

● Asia Pacific (N=135)  
● North America (N=39)

### Product Claims



# ➤➤➤ Innovative Sweetpotato Launches: L3M (November 2014 – January 2015)

## Rushui Dried Sweet Potato (Israel)

Dim Sum Sweet Potato Gyoza Dumplings are now available. They are low in fat and calories, and contain no monosodium glutamate, preservatives or flavours. The kosher certified product can be prepared by steaming, and retails in a 350g pack.



**Claims:**  
No Additives/Preservatives, Kosher,  
Low/No/Reduced Fat, Low/No/Reduced  
Calorie

## Daiichi Pan Sweet Potato Cake Ring (Japan)

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



**Claims:**  
Children (5-12)

## Nestlé Kit Kat Purple Sweet Potato Chocolate (Japan)

Nestlé Kit Kat Purple Sweet Potato Chocolate has been relaunched. The limited edition product is available exclusively in Okinawa and Kyushu and features bright purple sweet potato, wafer and white chocolate. It retails in a 5 x 11.6g gift pack. Launched on September 8, 2014 with an RRP of 378 yen. Also available in 12 x 11.6g packs for 864 yen.



**Claims:**  
Limited Edition

## Nestlé Gerber Lil'Crunchies Apple Sweet Potato Flavoured Baked Corn Snack (Canada)

Made with real fruit and vegetables and 100% baked whole grain corn. It is free from preservatives, artificial flavours or colours and dissolves easily. This snack is suitable for children aged 12 months and older and contains 4g of wholegrain per serving. The kosher certified product retails in a 42g pack bearing a Facebook link.



**Claims:**  
No Additives/Preservatives, Social Media,  
Kosher, Children (5-12), Wholegrain



# »»»→ Innovative Sweetpotato Launches: L3M (November 2014 – January 2015)

## Ivenet Bebe Grain Friend Sweet Potato Filled Grain Snack (South Korea)

Ivenet Bebe Grain Friend Sweet Potato Filled Grain Snack is made with selected seven domestic pesticide-free grains: brown rice; white rice; sticky barley; sticky rice; black soy; sorghum; and black rice. It also contains domestic sweet potato and added milk calcium to help maintain growth.



**Claims:**  
No Additives/Preservatives, Vitamin/Mineral Fortified, Added Calcium, Other (Functional), Ethical - Environmentally Friendly Product, Ease of Use, Babies & Toddlers (0-4)

## Zhajiang Rib Flavoured Sweet Potato Vermicelli (China)

Zhajiang Rib Flavoured Sweet Potato Vermicelli has been relaunched with better quality. The vermicelli is made using high quality sweet potato starch and processed according to authentic traditional technique and modern facility. This non-fried product is said to be soft and chewy, and retails in a newly designed 90g pack.



**Claims:**  
NA

## Mideulchae Ice Roasted Sweet Potato (South Korea)

Mideulchae Ice Roasted Sweet Potato is grilled on a stone plate, then quickly frozen at minus 40 degrees to maintain the sweet potato taste and nutrients. It can be enjoyed cool, hot or ground to make sherbet and is suitable as a convenient meal replacement, diet food or nutritious snack for children.



**Claims:**  
No Additives/Preservatives, Slimming

## Natureland Shepherd's Pie Mash (New Zealand)

Natureland Shepherd's Pie Mash is made with 100% natural ingredients, has no added salt or sugar, artificial additives, flavours, colours or thickeners and has been steam cooked. The microwaveable product has been fork mashed, is suitable for infants 6+ months and retails in a BPA-free 120g pack.



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

# »»» Innovative Sweetpotato Launches: L3M (November 2014 – January 2015)

## Leader Price Cooked Sweet Potatoes Mash with Citrus (France)

Leader Price Purée de Patates Douces aux Agrumes (Cooked Sweet Potatoes Mash with Citrus) are available for Christmas, and cooked with cream with citrus and coriander. This product has been elaborated with Jean-Pierre Coffe, can be microwaved, and retails in a 750g pack that serves five.



**Claims:**  
Seasonal, Microwaveable

## Season To Season Roasted Sticky Sweet Potato (South Korea)

Season To Season Roasted Sticky Sweet Potato has been relaunched. It is made of 100% pesticide-free domestic sweet potato cultivated in Haenam of Jeonnam province. High in sugar, the sweet potato has been deliciously roasted, peeled and semi-dried. This nutritious product can be enjoyed cold or hot, and retails in a 200g resealable pack.



**Claims:**  
Convenient Packaging, Ethical - Environmentally Friendly Product

## Fruity Sweet Potato Chips (Indonesia)

Fruity Keripik Ketela Ungu (Sweet Potato Chips) have been repackaged with in a newly designed 150g pack. They are vacuum-fried to perfection with all natural taste, smell, colour and appearance. These tasty and healthy tropical fruit chips are said to be a great taste of paradise.



**Claims:**  
NA

## B&P Naturens Sweet Potato, Beetroot, Apple, Carrot, Lime and Lemon Juice (Sweden)

B&P Naturens Skafferri Good for You 80 20 Grönsaks- & Fruktjuice (Sweet Potato, Beetroot, Apple, Carrot, Lime and Lemon Juice) is now available. According to the manufacturer, a 200ml glass of this product is equivalent to 100g of fresh vegetables and fruit. The vegetable and fruit juice retails in a 750ml pack.



**Claims:**  
NA



# Australian Sweetpotato Launches: L3M (November 2014 – January 2015)

**V8 Smoothies Strawberry,  
Raspberry & Banana  
Smoothie**



**McCain Sweet Potato  
SuperFries Crinkle Cut  
Bulk Pack**



**McCain Healthy Choice  
Wholegrains Malaysian  
Beef Curry**



**Black Swan Aussie Dip  
With Organic Sweet Potato**



**Yumi's Sweet Potato and  
Cashew Classic Dip**



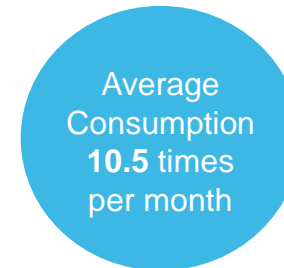


# Capsicums.



Purchase and consumption were higher, and in line with May 2014 levels.

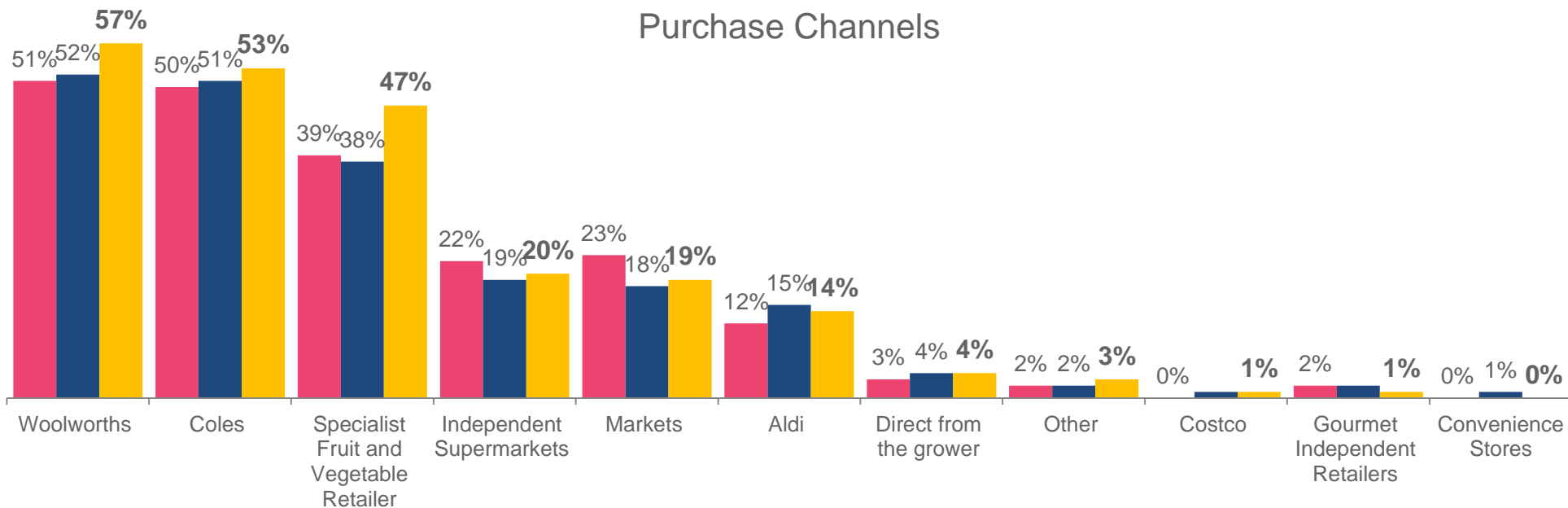
Capsicum is generally purchased from mainstream and specialist retailers, with healthy spikes seen in purchase frequency for both channels. Specialist retailers experienced the largest gains in purchase.



▲ 4.2 times, Wave 12  
▼ 3.8 times, Wave 16

■ 10.5 times, Wave 12  
▼ 9.6 times, Wave 16

### Purchase Channels



■ Wave 12: May 2014   ■ Wave 16: Sep 2014   ■ Wave 20: Jan 2015

Q1. On average, how often do you purchase <commodity>?  
 Q2. On average, how often do you consume <commodity>?  
 Q5. From which of the following channels do you typically purchase <commodity>?  
 Sample Wave 12, N=315, Wave 16, N=309 and Wave 20 N=353



Average spend and price and value perceptions are in line with previous waves.



Average weight of purchase

The average consumer typically purchased 640g of Capsicum in January 2015, which is lower than the previous wave, but in line with Wave 12.

- 640g, Wave 12
- ▲ 710g, Wave 16



Recalled last spend

The average recalled last spend for Capsicum was \$3.90, returning to levels seen in Wave 12.

- \$3.90, Wave 12
- ▼ \$3.70, Wave 16



Value for money

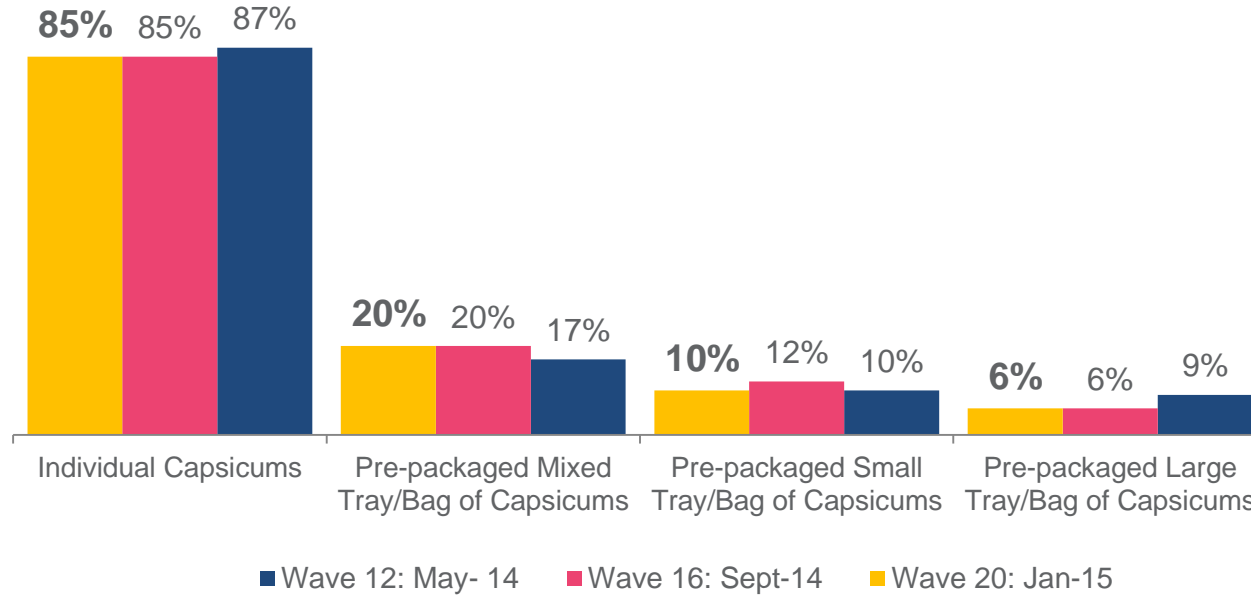
On average, consumers perceived Capsicum to be fair value for money (5.9/10), remaining stable over the previous wave.

- ▼ 5.6/10, Wave 12
- 5.9/10, Wave 16

Q3. How much <commodity> do you typically purchase when you shop for it?  
 Q3b. To the best of your memory how much did this cost on your most recent typically purchase?  
 Q4. Please indicate how Poor to Good Value you think this product is?  
 Sample Wave 12, N=315, Wave 16, N=309 and Wave 20 N=353



Individual capsicums remain the key format for purchase. Consumers typically purchase two per shop.

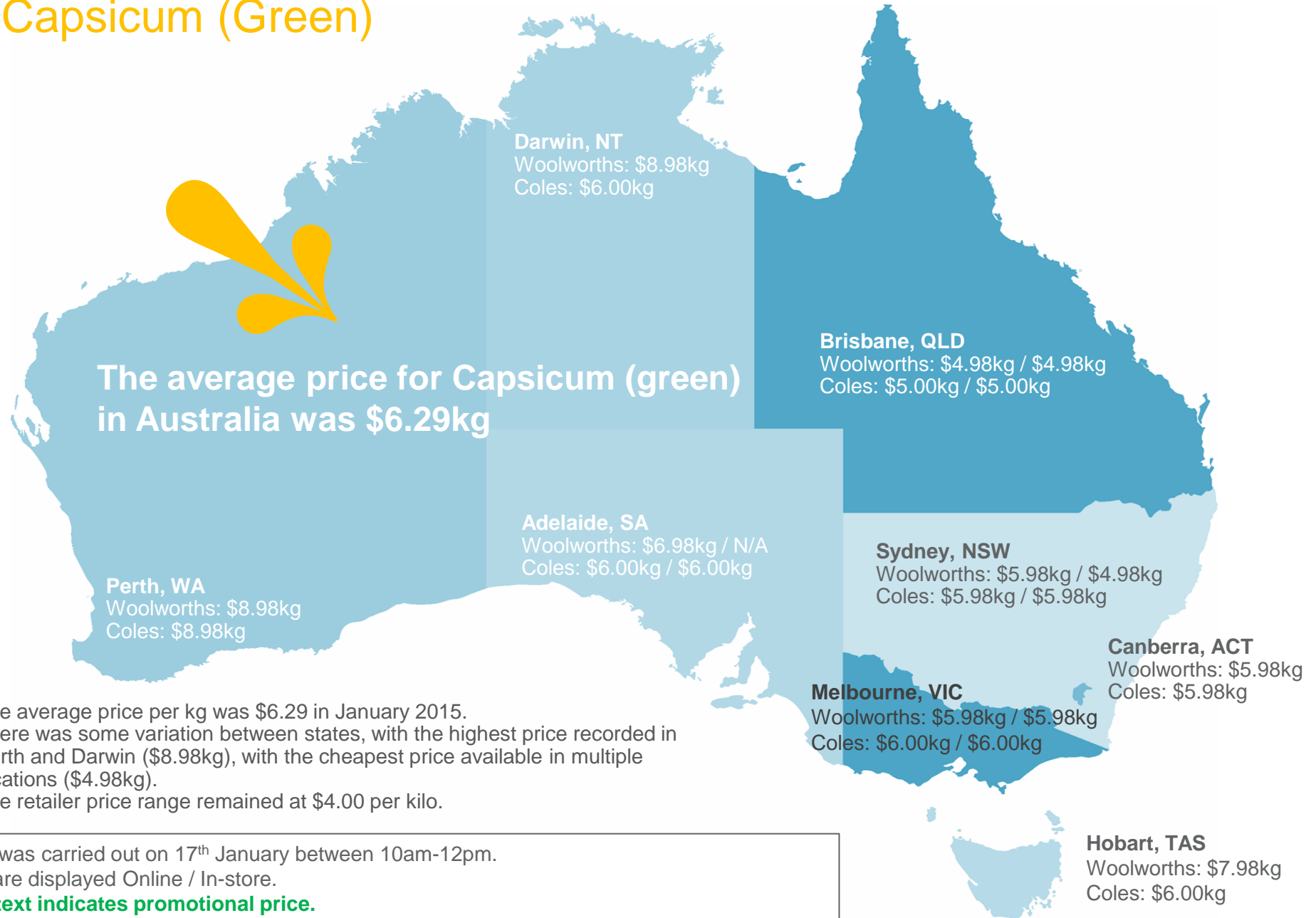


	Individual	Mixed Tray	Small Tray	Large Tray
Wave 12	2.4	1.4	1.8	1.6
Wave 16	2.5	1.8	1.7	2.2
Wave 20	2.4	1.4	1.6	1.7

Q3a. How much <commodity> does this typically equate to? Sample Wave 12, N=315 and Wave 16, N=309, Wave 20, N=353

# Online and In-store Commodity Prices

## Capsicum (Green)



- The average price per kg was \$6.29 in January 2015.
- There was some variation between states, with the highest price recorded in Perth and Darwin (\$8.98kg), with the cheapest price available in multiple locations (\$4.98kg).
- The retailer price range remained at \$4.00 per kilo.

Pricing was carried out on 17<sup>th</sup> January between 10am-12pm.  
Prices are displayed Online / In-store.

**Green text indicates promotional price.**

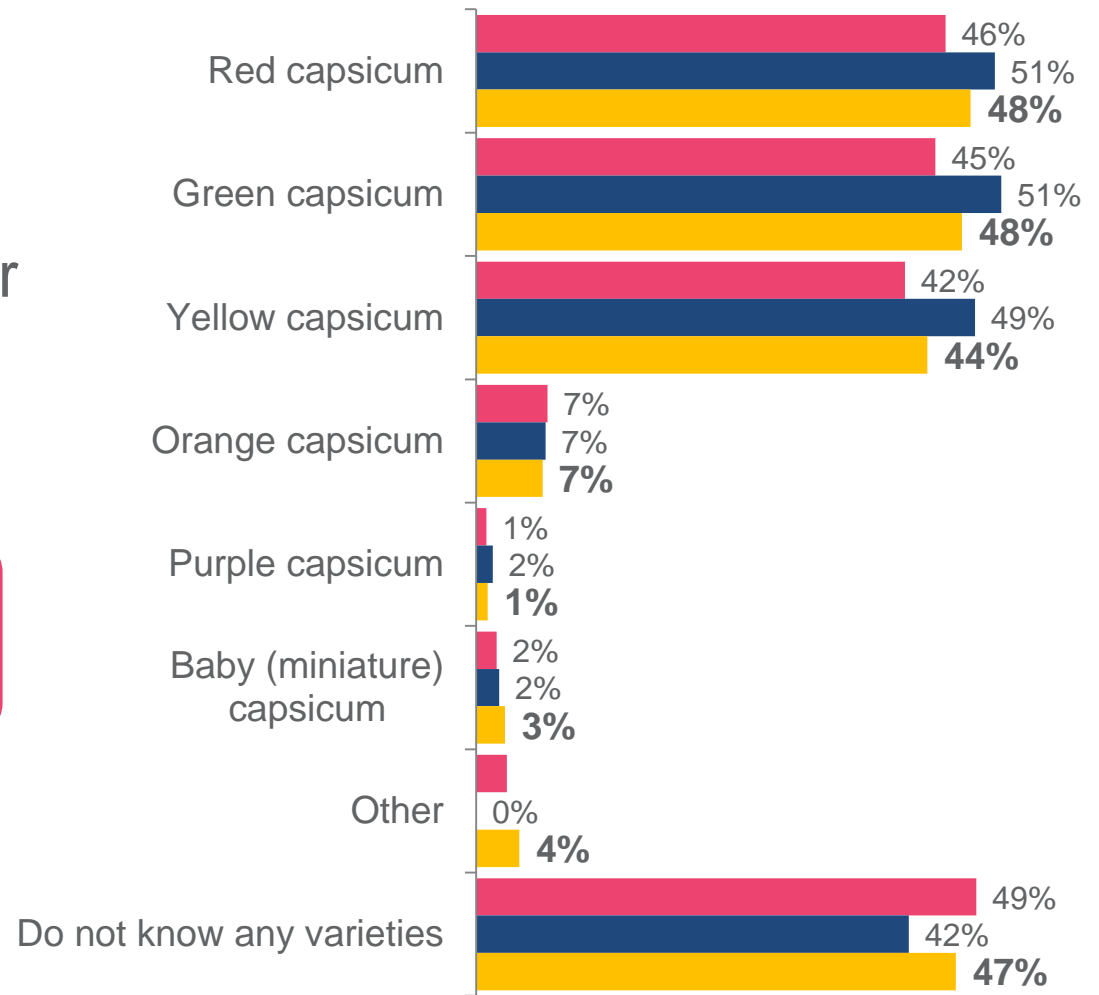




This wave sees awareness of varieties return to levels seen in Wave 12, with red, green and yellow varieties most commonly recalled.

Consumers recall the colour of capsicum much more often than any specific variety.

*“Just the different colours - red, orange and green”*

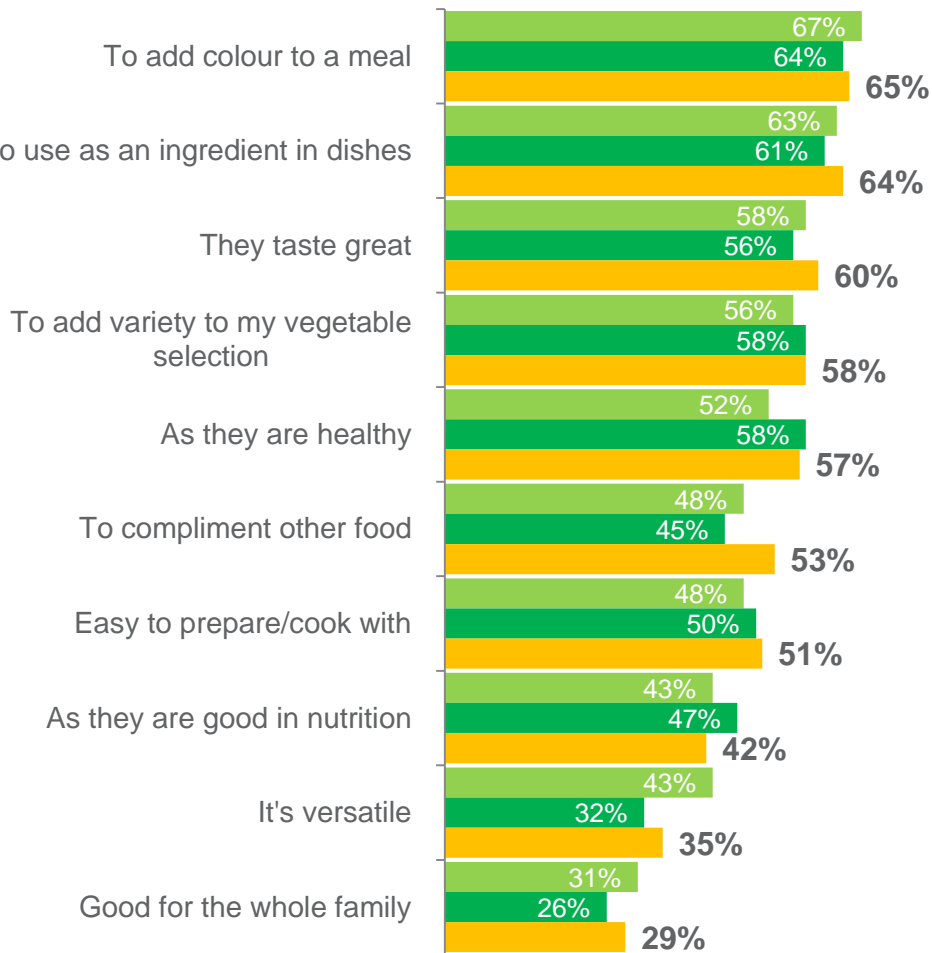


■ Wave 12: May 2014 ■ Wave 16: Sep 2014 ■ Wave 20: Jan 2015

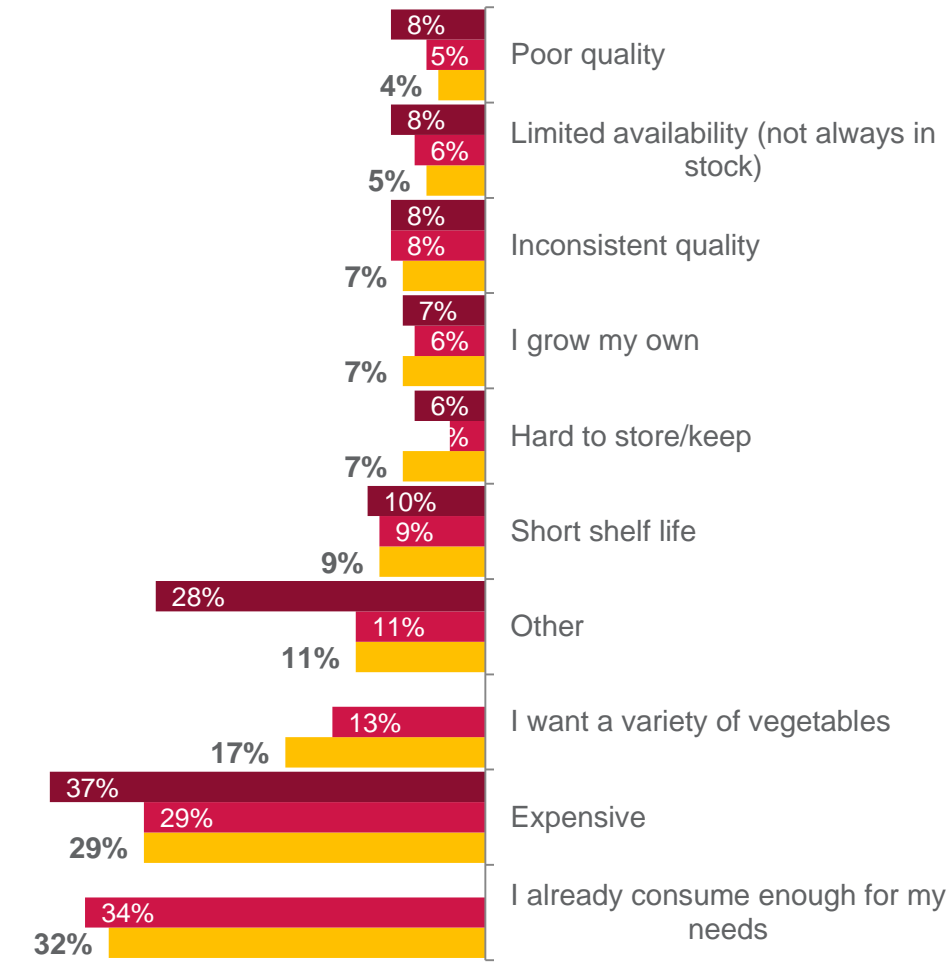


The key trigger to purchase was using capsicum to add colour to a meal. After reductions in Wave 16, price remained stable as the second key barrier to purchase, preceding consuming enough for my needs.

### Triggers



### Barriers



■ Wave 12: May 2014 ■ Wave 16: Sep 2014 ■ Wave 20: Jan 2015

■ Wave 12: May 2014 ■ Wave 16: Sep 2015 ■ Wave 20: Jan 2015

Q7. Which of the following reasons best describes why you purchase <commodity>?  
 Q8. Which reason best describes why you don't buy <commodity> more often?  
 Sample Wave 12, N=315, Wave 16, N=309 and Wave 20 N=353



Capsicums are most frequently used in Asian cuisine, particularly Chinese and Thai.

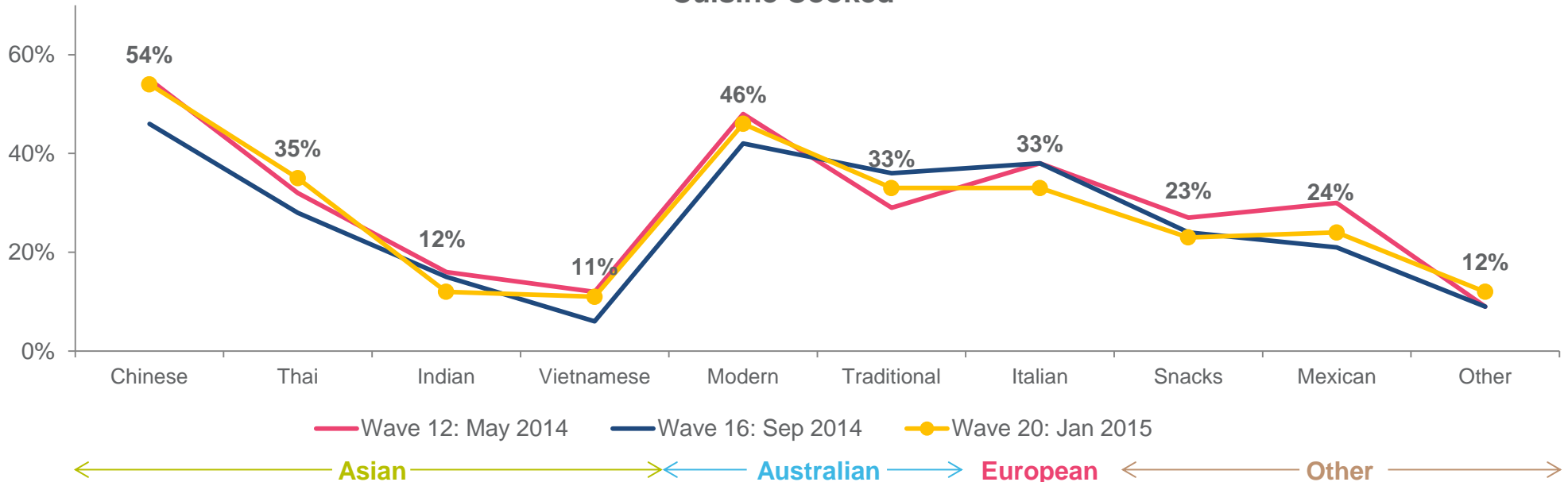
The top five consumption occasions have remained largely stable, however every-day meals has experienced a considerable decline.



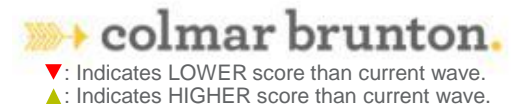
### Top 5 Consumption Occasions

	Wave 20	Wave 16	Wave 12
Weekday Dinner	56%	56%	54%
Quick Meals	41%	39%	41%
Family meals	39%	39%	37%
Weekend Dinner	38%	39%	39%
Every-day	31%	38%	38%

### Cuisine Cooked



Q10. What cuisines do you cook/consume that use <commodity>?  
 Q11. Which of the following occasions do you typically consume/use <commodity>?  
 Sample Wave 12, N=315, Wave 16, N=309 and Wave 20 N=353

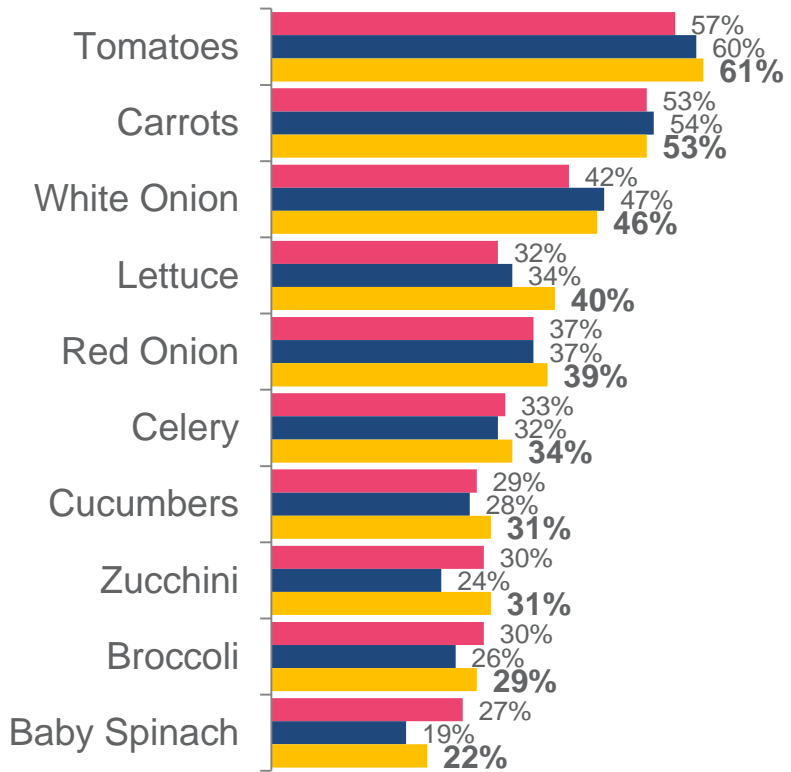




Capsicum is typically served with tomatoes and carrots, which remains relatively consistent over the previous waves. Lettuce continues to trend upwards as an accompanying vegetable.

On trend with Asian cuisine, the main cooking technique for capsicum is stir-frying.

Top 10 Accompanying Vegetables



■ Wave 12: May 2014 ■ Wave 16: Sep 2014 ■ Wave 20: Jan 2015

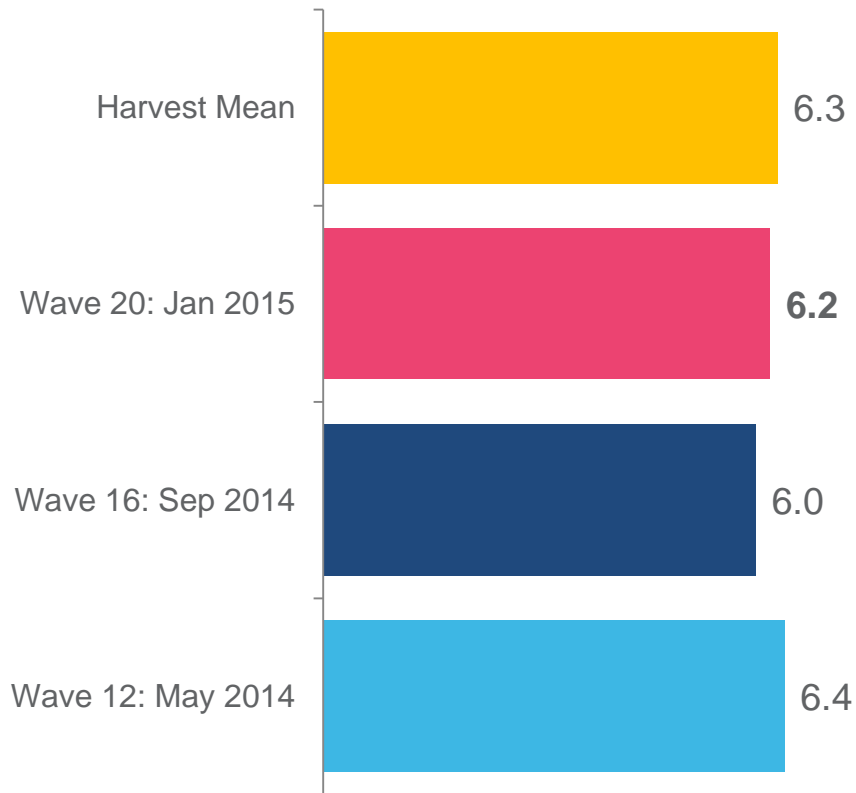
Top 10 Cooking Styles

	Wave 12	Wave 16	Wave 20
Stir frying	74%	71%	75%
Raw	53%	56%	56%
Roasting	28%	35%	25%
Sautéing	23%	21%	21%
Stewing (slowcooking)	20%	21%	18%
Grilling	24%	20%	17%
Baking	18%	17%	15%
Shallow Frying	12%	12%	12%
Soup	16%	12%	12%
Steaming	10%	8%	10%

Q9. How do you typically cook <commodity>?  
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?  
Sample Wave 12, N=315, Wave 16, N=309 and Wave 20 N=353



The importance of Capsicum provenance saw an increase on the previous wave, sitting only slightly below the Harvest mean. Variability in importance may be linked to seasonality and availability.



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

Q14. When purchasing <commodity>, how important is Provenance to you?  
Mean scores out of 10.  
Sample Wave 12, N=315, Wave 16, N=309 and Wave 20 N=353

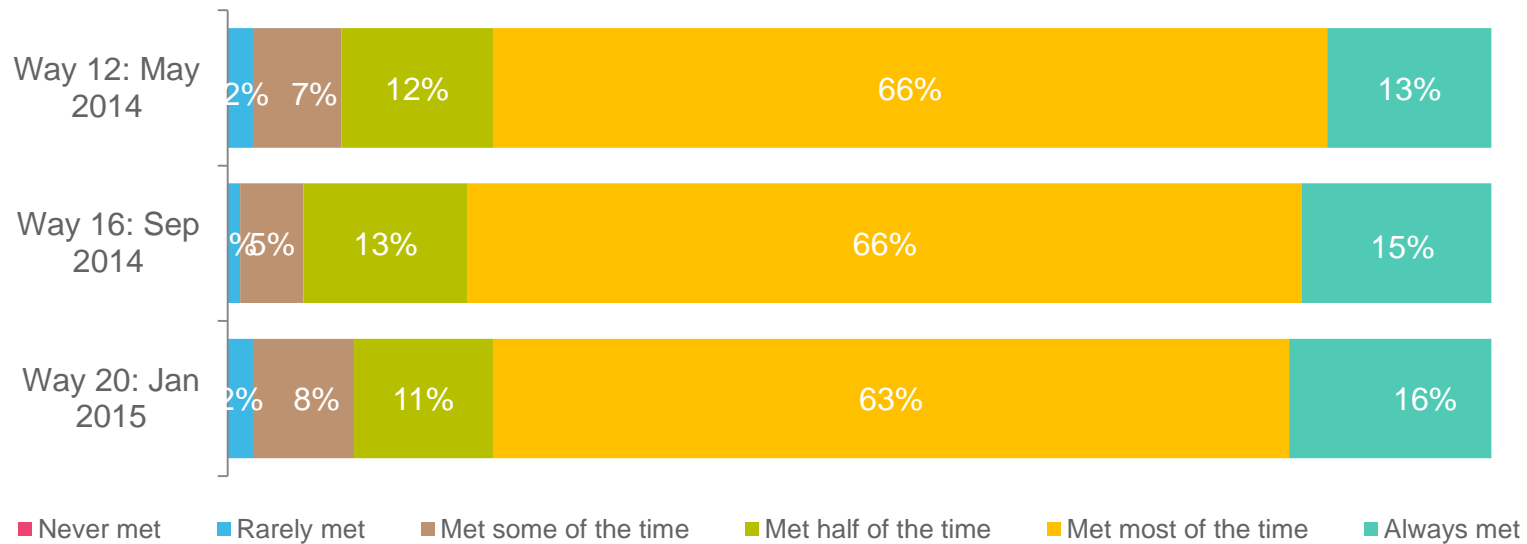


Capsicums are expected to remain fresh for up to eight days once purchased, in line with past months. Positively, there has been a directional increase in expectations always being met.

Expected to stay fresh for **8.2 days**

- 8.2 days, Wave 12
- 8.5 days, Wave 16

### Expectations Met



Q12. How long do you expect <commodity> to stay fresh for, once you have purchased it?  
 Q13. How often is this length of freshness met when you buy <commodity> ?  
 Sample Wave 12, N=315, Wave 16, N=309 and Wave 20 N=353



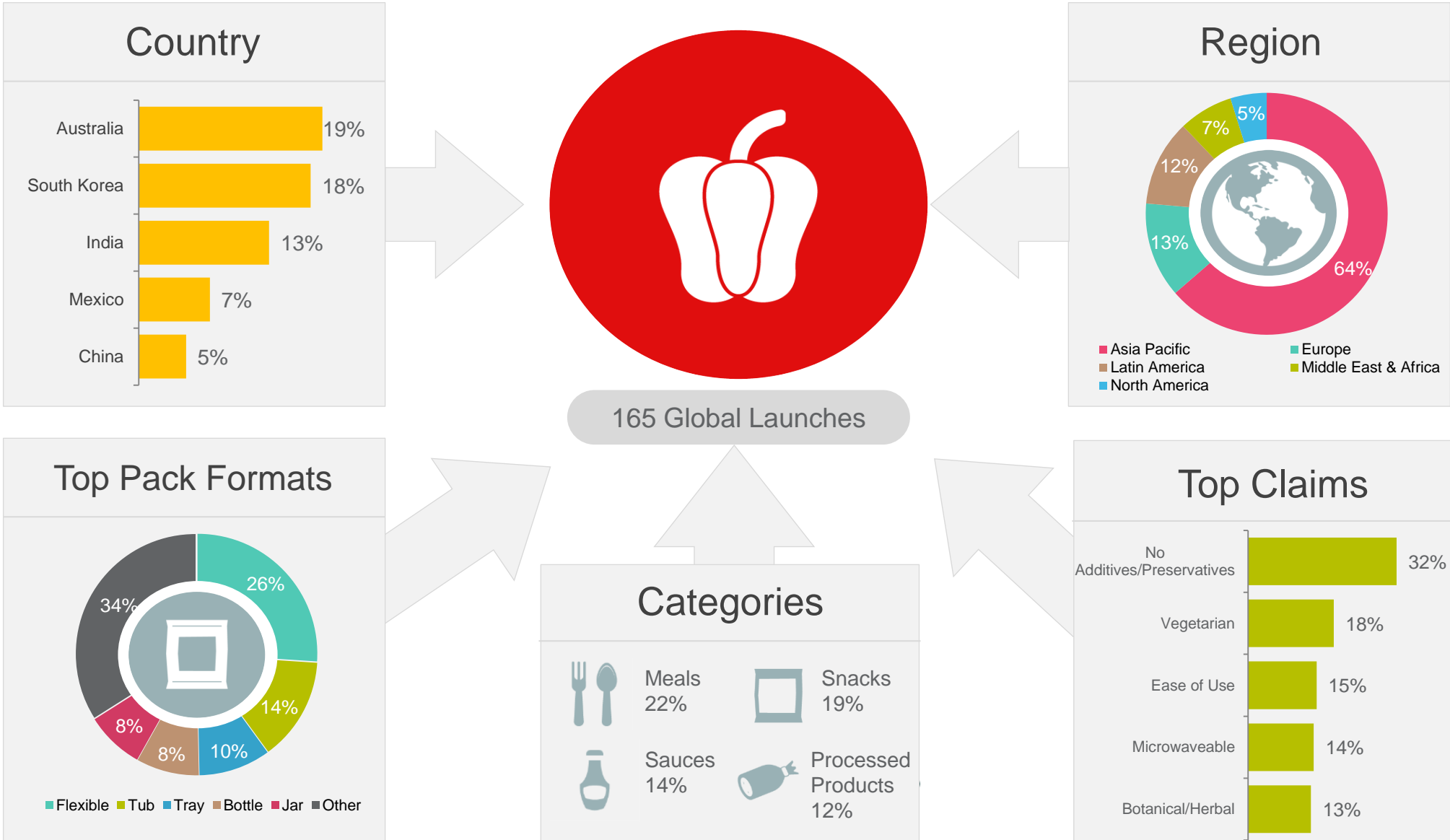
# Trends: Capsicums

*\*Mintel search term was Capsicum*

# Capsicum Global NPDs

## November 2014 – January 2015

There were 165 products launched over the last three months that contained Capsicum as an ingredient. A large portion of these products were launched in Asia Pacific, specifically Australia, South Korea and India. New products were snacks, meals, sauces and processed products.







# Capsicum Product Launches: L3M (November 2014 – January 2015) Summary

- There were 165 products launched globally in the last three months that contained capsicum as an ingredient.
- There were 31 products launched in Australia, an increase from the previous wave, with innovative launches found on the following slides.
- Top countries for launches were Australia (19%), South Korea (18%) and India (13%), with over two thirds of products launched in the Asia Pacific region.
- Flexible pack format (26%) and tubs (14%) were the most used packaging for products over the last three months, consistent with previous trends.
- Meals (22%) were the main launch category for products containing capsicum. Snacks (19%), sauces and seasonings (14%) also had a number of product launches.
- Product claims were around health; no additives/preservatives (32%) and vegetarian (18%) and convenience; ease of use (15%) and microwaveable (14%).
- The most innovative product launches were Hungarian capsicum massage oil and a pizza topper kit launched in Australia (examples of these can be found in the following pages).



Source: Mintel (2014)

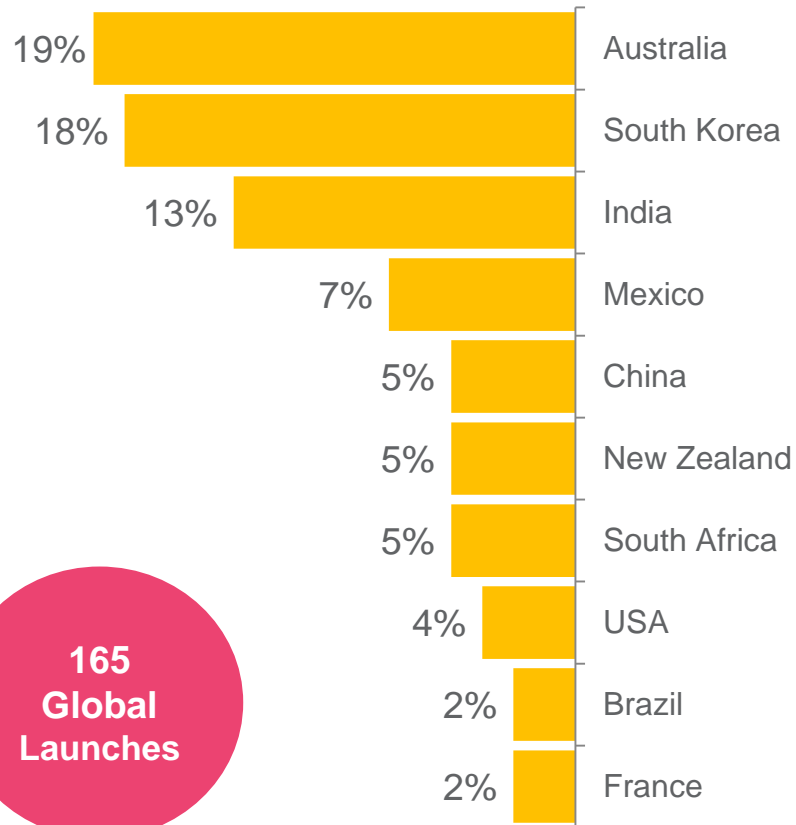




# Country & Categories Launches

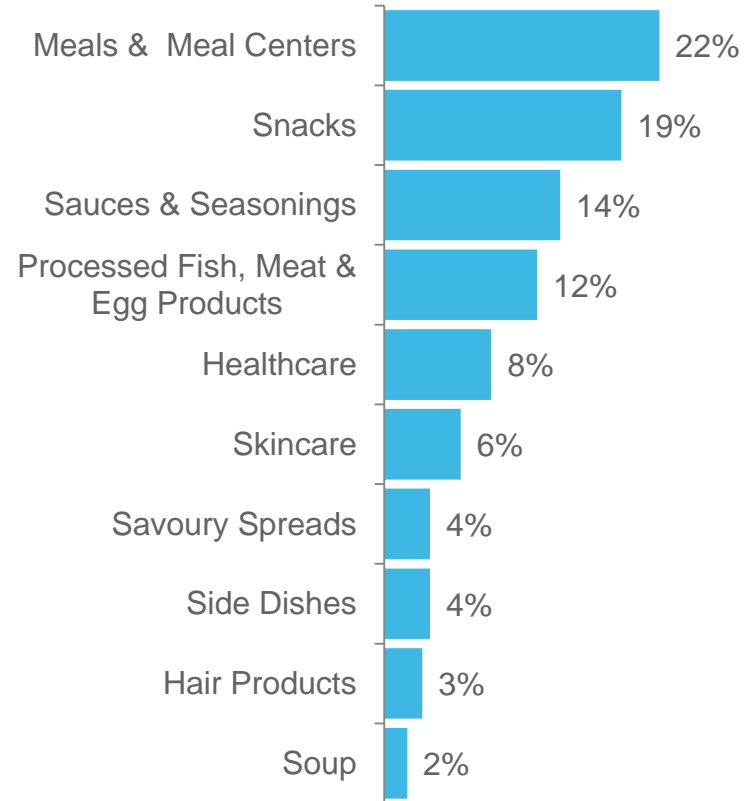
- Australia had the greatest number of capsicum product launches over the last 3 months. South Korea and India also had a number of launches.
- Meals and snacks were the main product categories, similar to previous trends.

### Top Launch Countries



**165  
Global  
Launches**

### Top Launch Categories

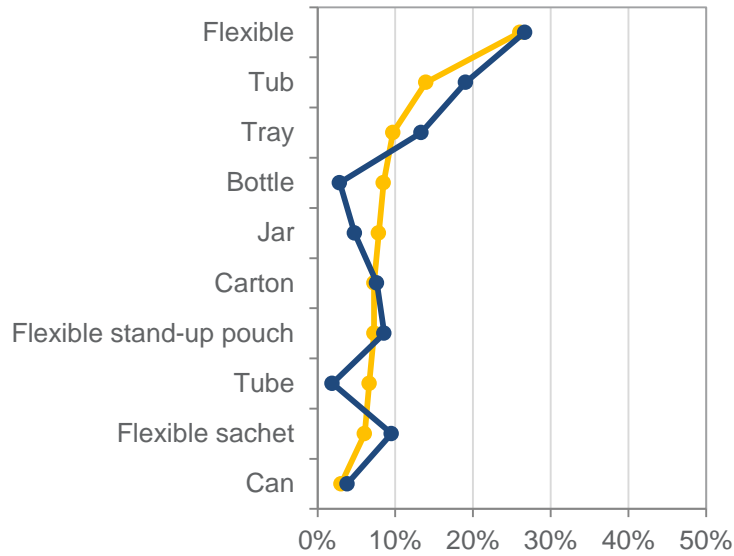




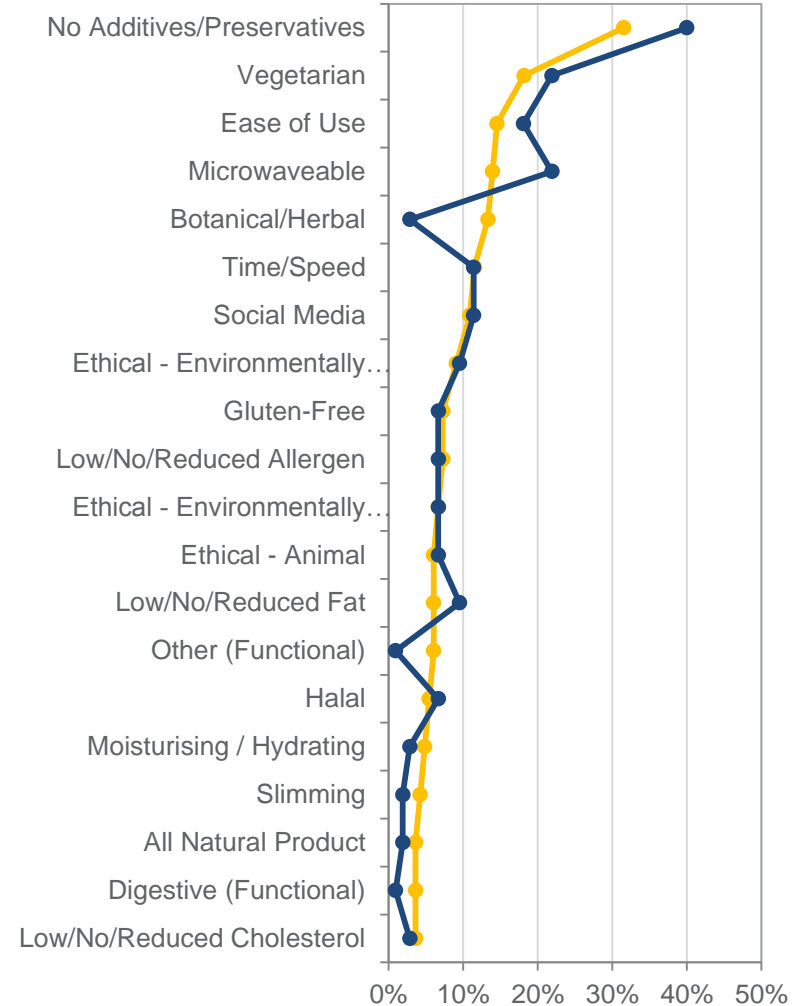
# Claims and Packaging Used

- ▶ Flexible packaging remained the most common format used, with tubs and trays used to a lesser extent.
- ▶ Product claims were around health; no additives/preservatives and vegetarian and convenience; ease of use and microwave-ability.

### Pack Format



### Claims



Only regions with n >30 are displayed

● Global N=165 ● Asia Pacific N=105

# »»» Innovative Capsicum Launches: L3M (November 2014 – January 2015)

## Party with Iceland Pepper Popsters (South Africa)

Party with Iceland Pepper Popsters are breaded with green peppers with spicy sauce. This product is suitable for lacto-vegetarians and retails in a 168g pack containing 12 pieces.



**Claims:**  
Vegetarian

## Genomma Lab. Goicoechea Moisturising Foot & Hand Cream (Brazil)

Now available with a new formula with L-arginine, especially developed for diabetic skin hydration. Designed to improve the skin appearance in rough areas with extreme dryness. It also contains: capsicum, to help to stimulate the blood circulation; allantoin, which has calming and protecting properties for the feet; and caprylic/capric triglycerides, which is said to have an emollient action and combats the skin dryness due to a bad circulation. According to the manufacturer, the product provides an immediate relieving action and helps to eliminate the roughness and flaking due to an extreme dryness, while hydrating and restoring the lost



**Claims:**  
Botanical/Herbal, Moisturising / Hydrating, Diabetic, Time/Speed

## Gustazo Bacalao de Manila (Phillipines)

Gustazo Bacalao de Manila comprises surgeon fish sautéed in tomato sauce together with fresh tomatoes, capsicums and various spices. It is described as a local version of the popular Spanish dish and is slowly cooked to get uniquely appetizing taste which goes well with rice and pasta. The product retails in a recyclable 225g jar.



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

## Specchiasol Peso Balance Vegetable Extracts Dietary Supplement (Italy)

It features a unique combination of phytocomplexes called Green 4 Fit and consisting of green tea extract to help balance body weight, green coffee and capsicum to stimulate metabolism, and black pepper with antioxidant activity. The gluten-free product retails in a 11.25g pack that contains 30 vegetable capsules.



**Claims:**  
Low/No/Reduced Allergen, Botanical/Herbal, Other (Functional), Slimming, Gluten-Free, Antioxidant

# ➤➤➤ Innovative Capsicum Launches: L3M (November 2014 – January 2015)

## Yamuna Natural Beauty Capsicum Massage Oil with Capsicum Extract (Hungary)

Yamuna Natural Beauty Capsicum Massage Oil with Capsicum Extract is said to be produced from quality raw materials with undiluted capsicum extract. This oil also contains stimulating agents and is suitable for foil slimming treatments, and recommended for sportsmen and people on diet alike. The cruelty-free product retails in a 250ml pack.



**Claims:**  
Botanical/Herbal, Ethical - Animal, Slimming\*

## Dani Red Pepper Pulp (Spain)

Dani Pulpa de Pimiento Choricero (Red Pepper Pulp) is now available. This product is free from gluten and can be used for sauces, condiments, dressing, and to give colour and flavour to egg, cheese, potatoes and cod dishes. It retails in a 125g pack.



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

## USN 4 Way Slim Ketone Weight Control Capsimax Capsules (USA)

USN 4 Way Slim Ketone Weight Control Capsimax Capsules support metabolism and weight control. This raspberry flavoured product retails in a pack containing 60 units, bearing Facebook, Twitter, and Instagram logos.



**Claims:**  
Other (Functional), Slimming, Social Media

## Fix & Fertig Paprinos Stuffed with Cream Cheese (Germany)

Fix & Fertig Paprinos mit Cremigem Frischkäse Gefüllt (Paprinos Stuffed with Cream Cheese) come in a crunchy breading filled with creamy fresh cheese, where Paprinos stand for Hearty Peppadew piquant fruit. They are free from flavour enhancers, colourants and flavourings. The vegetarian product retails in a 300g pack.



**Claims:**  
No Additives/Preservatives, Vegetarian

# ➤➤➤ Innovative Capsicum Launches: L3M (November 2014 – January 2015)

## Nature Republic Fresh Vegetable Massage Cream (South Korea)

Nature Republic Fresh Vegetable Massage Cream is described as a rich vegetable cream that keeps the skin moisturised and radiant, even after a gentle massage. It is said to nourish the skin with vitamin capsules, and retails in a 200ml pack.



**Claims:**  
Botanical/Herbal, Brightening / Illuminating\*, Vitamin/Mineral Fortified, Moisturising / Hydrating

## Trader Joe's Sardines in Harissa (USA)

Trader Joe's Sardines in Harissa are wild caught. This ready to eat product retails in a 4.4-oz. can.



**Claims:**  
Ease of Use

## Natrx Humex K Heat Rub for Muscles and Joints (South Africa)

Natrx Humex K Heat Rub for Muscles and Joints helps provide symptomatic relief of minor muscle and joint aches and pains associated with stiffness, strains, sprains, arthritis, fibromyalgia, backache and muscle cramps. The product is recommended to be used with Humex K capsules, and retails in a 125ml pack.



**Claims:**  
Other (Functional)

## SunRice Global Kitchen Middle Eastern Style Rice with Pumpkin & Aromatic Spices (New Zealand)

SunRice Global Kitchen Middle Eastern Style Rice with Pumpkin & Aromatic Spices is a delicious combination of basmati rice, pumpkin, capsicum and aromatic spices. This quick and microwavable product is ready in 90 seconds, and contains no artificial flavours, added colours or preservatives. It retails in a 250g pack.



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



# Australian Innovative Launches: L3M (November 2014 – January 2015)

**Black Swan Pop Up Spicy 'n' Sweet Dip**



**The Pure Produce Company Capsicum, Chives & Parmesan Dip**



**McCain Healthy Choice Wholegrains Thai Beef & Basil Stir Fry**



**John West Tuna Pasta Salsa with Mexican Salsa**



**Safcol Italian Tuna Meal**



**Picasso Kitchen Pizza Toppers! Pepperoni Pizza Topper Kit**



**Remano Hot & Spicy Cous Cous**



**Colonial Farm Chickpea Parcels**





In the Media.







# General Vegetable News

## (November 2014 – January 2015)

- Australian consumers are buying more Asian vegetables more often. Spearheaded primarily by couples aged 35-59 (30% of the total volume), Asian vegetables are carving out a spot in the Australian diet, with an 8% increase in both sales by volume and overall value of sales. “These vegetables, including bok choy, choy sum, wombok and pak choy, are becoming increasingly popular with Australian consumers”.
- A South Australian vegetable grower is hoping a hybrid created from cross-breeding kale and Brussels sprouts will be a hit with consumers this year. Referred to as kalettes in the US, this ‘kale sprout’ is expected to take over from quinoa in 2013 and kale in 2014 as edible plant of the year.
- Strong domestic vegetable prices and rising vegetable consumption for much of the three years through 2013-14 have helped the industry return to growth, however the industry is expected to contend with intensifying competition from cheap processed imports over the next five years.

Sources: [www.dailyexaminer.com.au](http://www.dailyexaminer.com.au),  
[www.pressreleaserocket.net](http://www.pressreleaserocket.net), [www.abc.net.au/news](http://www.abc.net.au/news)



# »»»→ Commodity News

## (November 2014 – January 2015)



- An article in the Detroit Free Press has highlighted the versatility of bok choy to consumers, indicating it can be eaten raw, steamed or sautéed. They also suggested dishes and cuisines or each cooking style, such as substitution for lettuce in salads, side dishes and in broths and soups.

<http://www.freep.com/story/life/food/2015/>



- A study conducted in the UK found that one glass of beetroot juice a day can reduce blood pressure in patients who suffer from high blood pressure conditions (hypertension).

<http://www.medicalnewstoday.com/articles/288229.php>



- Sweetpotato is available all year round and should have consistent quality and freshness, indicating a staple for any household.

They are a great substitution for white potatoes, ranking significantly lower on the glycemic index (GI).

<http://www.shelbystar.com/lifestyles>



- Capsicums are from the same vegetable family as tomatoes and potatoes. They are best consumed quickly after purchase before the sugar turns to starch. The colour of the capsicum is linked with the level of ripeness and also sweetness (red being most sweet and ripe). Capsicums are also highly versatile, good for BBQing, roasting, stuffing and eating raw.

<http://www.goodfood.com.au/good-food/food-news/>



# Thanks.

