Tracker Report Wave 21: Green Bean, Carrot, Cauliflower & Pumpkin

Prepared by: Jenny Witham, Denise Hamblin, Fiona McKernan
& Kristian Williams

Contents

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 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 21, February 2015) focuses on:

- Green Beans
- Carrots
- Pumpkins
- Cauliflowers

Essentially this is the sixth wave of tracking for these specific commodities. The current report will bring to light any change over the previous months.

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

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Online Methodology.

- Respondents were recruited via an Online Panel. If the respondents met the recruitment requirements of sufficient vegetable consumption (monthly) they were asked to complete the online questionnaire.
- All respondents completed general demographic and consumption questions. If respondents purchased any of the specific commodities within the last month they would complete those questions. A minimum of N=300 respondents completed the commodity 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.

Sample.

In total, 621 respondents completed the questionnaire. Respondents represented all States and Territories, as well as both metro and rural areas.

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

To qualify for the questionnaire, respondents...

- Were aged 18 years and over
- Purchased fresh vegetables at least once a month
- Purchased at least one of the monthly commodities (Bean, Carrot, Cauliflower or Pumpkin) within the last month
- Were the main or joint grocery buyer

	Total N=621	Bean N=309	Carrot N=312	Cauliflower N=310	Pumpkin N=311
Gender					
Male	36%	33%	38%	37%	34%
Female	64%	67%	62%	63%	66%
Age					
18-24 y.o.	5%	5%	7%	5%	5%
25-34 y.o.	17%	19%	13%	18%	18%
35-44 y.o.	16%	13%	18%	18%	15%
45-54 y.o.	19%	20%	20%	16%	21%
55-64 y.o.	23%	22%	23%	24%	23%
65+ y.o.	20%	22%	20%	19%	18%
Household					
Single Income no Kids	19%	16%	23%	19%	19%
Double Income no Kids	15%	16%	17%	15%	12%
Young Families	17%	17%	14%	16%	20%
Established Families	22%	23%	21%	22%	21%
Empty Nesters	27%	28%	25%	28%	29%
Location					
New South Wales	16%	15%	19%	16%	15%
Victoria	19%	21%	16%	22%	19%
South Australia	19%	16%	21%	21%	17%
Queensland	20%	21%	22%	14%	23%
Western Australia	16%	15%	16%	17%	15%
Tasmania	6%	7%	4%	6%	7%
Australian Capital Territory	4%	5%	3%	4%	4%

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.

Commodity

Number of Launches L3M

Country

Top countries where products were launched.

Region

What regions new products were launched in.

Top Pack Formats

Top pack formats used for products.

Top Categories

Top categories that products were launched in.

Top Claims

Top claims made by products that were launched.

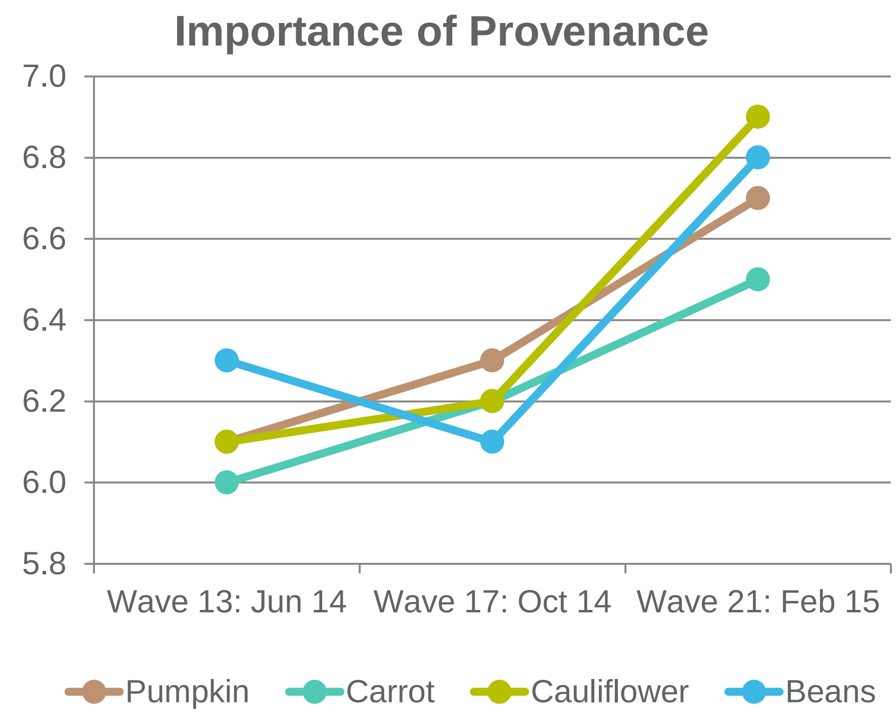
Wave 21: Executive Summary

Industry Insight

Since the current tracking began almost two years ago we have seen that the provenance of the vegetables consumers buy is important. When speaking to consumers, we found that this is predominantly due to the perceived freshness of local vegetables and the shelf-life consumers expect.

However, during this wave of our consumer tracker, we saw a sharp increase in the importance of provenance for all vegetables of interest. This coincided with a national recall of Pattie's Foods, Nanna's and Creative Gourmet frozen mixed berries following a string of Hepatitis A infections. Provenance is now inextricably linked to food safety and trust, as well as feelings of fear and anger among consumers who had these, or similar products, in their freezers.

Although unfortunate, incidents such as these can remind consumers of what is important, albeit taken for granted. It also represents an opportunity for industries and products that can show that they are 'Australian Made' or 'Australian grown'. The Australian agriculture industry, as well as retailers, now has such an opportunity.



Fact Base – Beans

- Overall, Beans have low consumer endorsement and recommendation, as well as overall satisfaction.
- Beans are purchased 3.5 times per month and consumed 7.0 times per month. Beans are generally purchased from Woolworths or specialist retailers.
- Consumers are purchasing 600g on average, which is consistent across waves. Recalled last spend is $3.70.
- Price tracking indicates a consistent price per kg; $6.67, which is higher than previous waves. The retail price range is 3.98 per kg.
- Awareness of bean types remains very low, with over of half consumers unable to recall a type of bean. This was consistent with previous waves.
- Main influences on future purchase are ease of preparation and cooking and health. Consuming enough for their needs and wanting variety in their diet remain the key barriers to purchase.
- Consumers expect beans to remain fresh for a week after purchase. Increasingly, this expectation is met.

Fact Base – Carrots

- Consumer satisfaction with carrots is on trend with all commodities tracked thus far, however importance and interest in new varieties is particularly low.
- On average carrots are purchased 3.7 times per month and consumed 14.4 times per month. Purchase is from mainstream retailers.
- Average purchase is 1.1kg of carrots, this has declined across waves. Recalled last spend was $2.40. Overall, consumers perceive carrots as very good value for money.
- National pricing analysis reveals a slight increase from October 2014 at $2.14kg.
- Awareness of carrot types remains low. Purple and orange carrots have the highest awareness, indicating colour is the trigger to recall.
- Key triggers to purchase are health and ease of preparation, consistent with previous months. A key barrier to purchase is that consumers already purchase enough for their needs.
- Carrots are expected to stay fresh for over 12 days. Freshness expectations are typically met.

Fact Base – Cauliflower

- Consumer sentiment for cauliflower remains low, especially perceived importance of cauliflower, however future purchase intent is strong.
- On average consumers purchase cauliflower 3.2 times per month and consume 7.8 times. Purchase is from mainstream retailers, Coles and Woolworths.
- On average, consumers purchase 900g of cauliflower per shop. Recalled last spend is $3.30. Overall, cauliflower is perceived as only fair value for money.
- Price analysis reveals a national average retail price of $4.41 each, up from October 2015. The retail price range in February is $3.59.
- Key triggers to purchase cauliflower are ease of preparation and taste. Whilst consuming enough for consumers needs is the main barrier to purchase.
- Cauliflowers are expected to stay fresh for over 8 days once purchased. Expectations of freshness are typically met, which is increasing across waves.

Fact Base – Pumpkins

- Consumers hold strong importance for pumpkins, wanting a range available when they shop. Other consumer sentiment measures are in line with the commodity averages.

- Pumpkins are purchased 3.0 times per month and consumed 8.3 times per month, consistent with previous waves. Pumpkin is typically purchased from mainstream retailers.

- Consumers purchase on average 1.3kg per shop, in line with previous months. Recalled last spend is $3.30, which is perceived to be good value for money. This is consistent with previous months.

- Price tracking reveals differentiation between states and retailers due to price promotion in Sydney and Canberra. The average price is $2.93/kg.

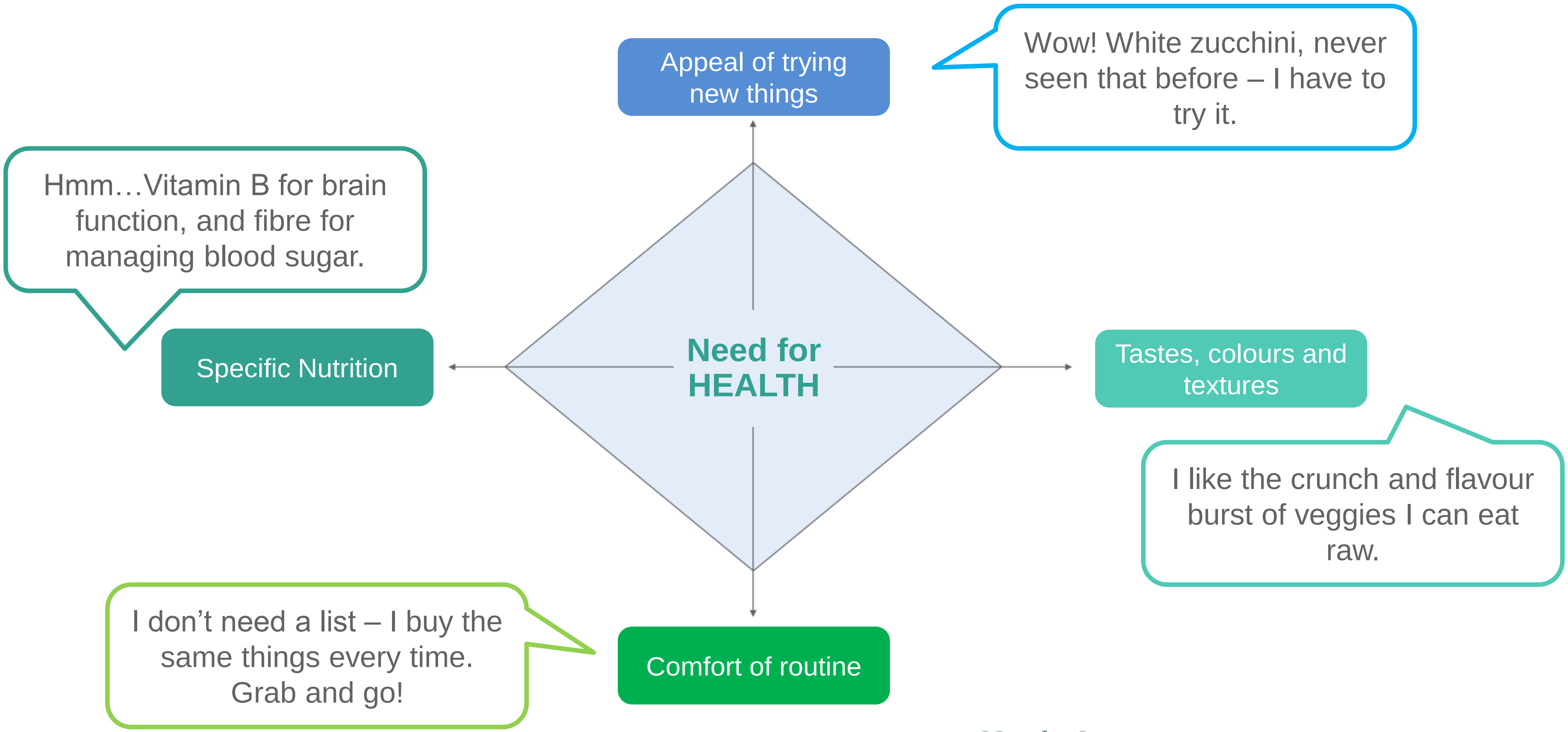
- Triggers to purchase are taste and ease of preparation and cooking. Consuming enough for consumers needs is the key barrier to purchase.

- Pumpkin is expected to stay fresh for 11 days, which has directionally declined across waves. Overall, this expectation is typically met.

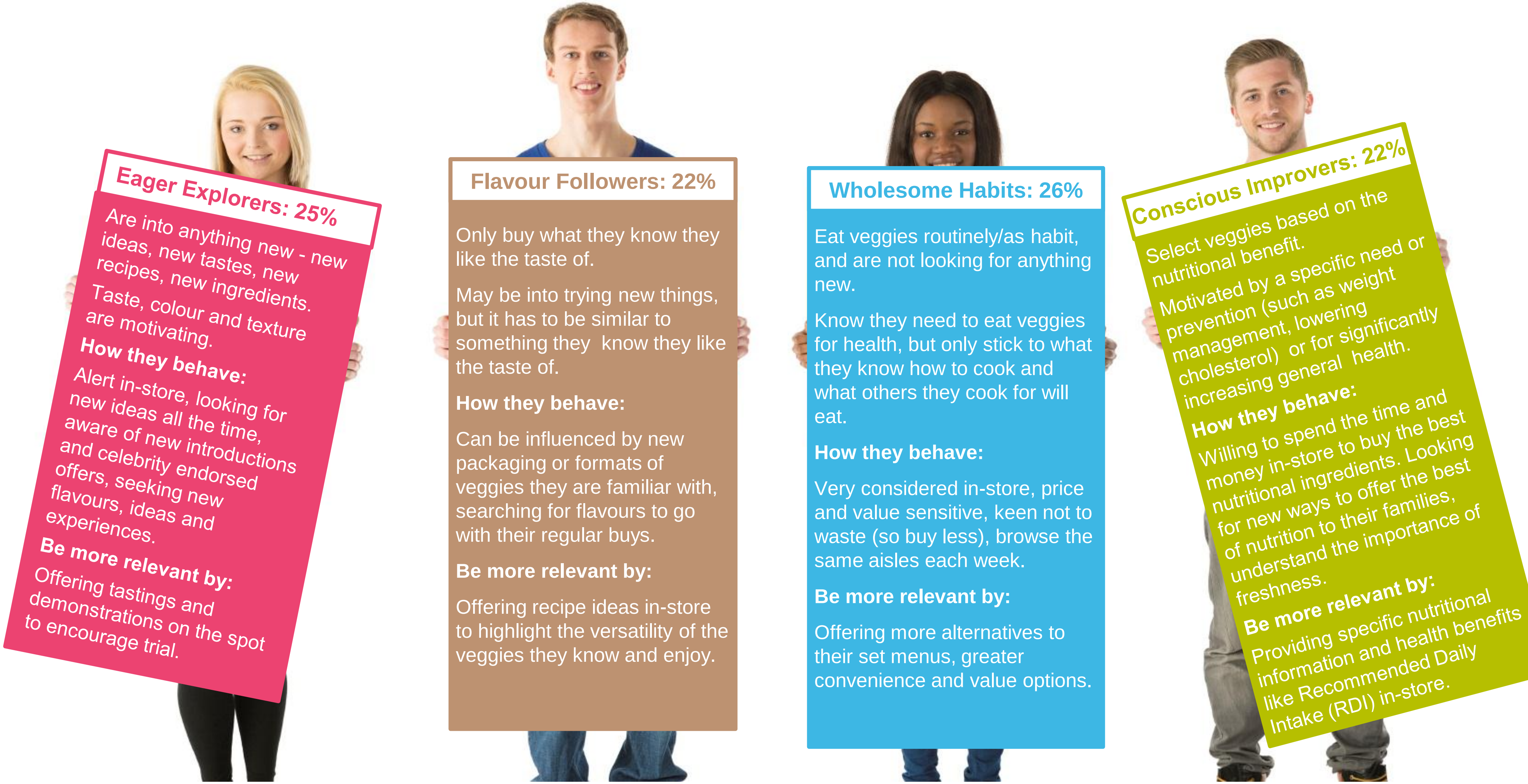
Wave 21: Consumer Segmentation

Four key drivers influence consumers' fresh vegetable preference and purchase

Consumers have distinct attitudes towards vegetables, however all consumers believe that 'eating vegetables is necessary for their health'

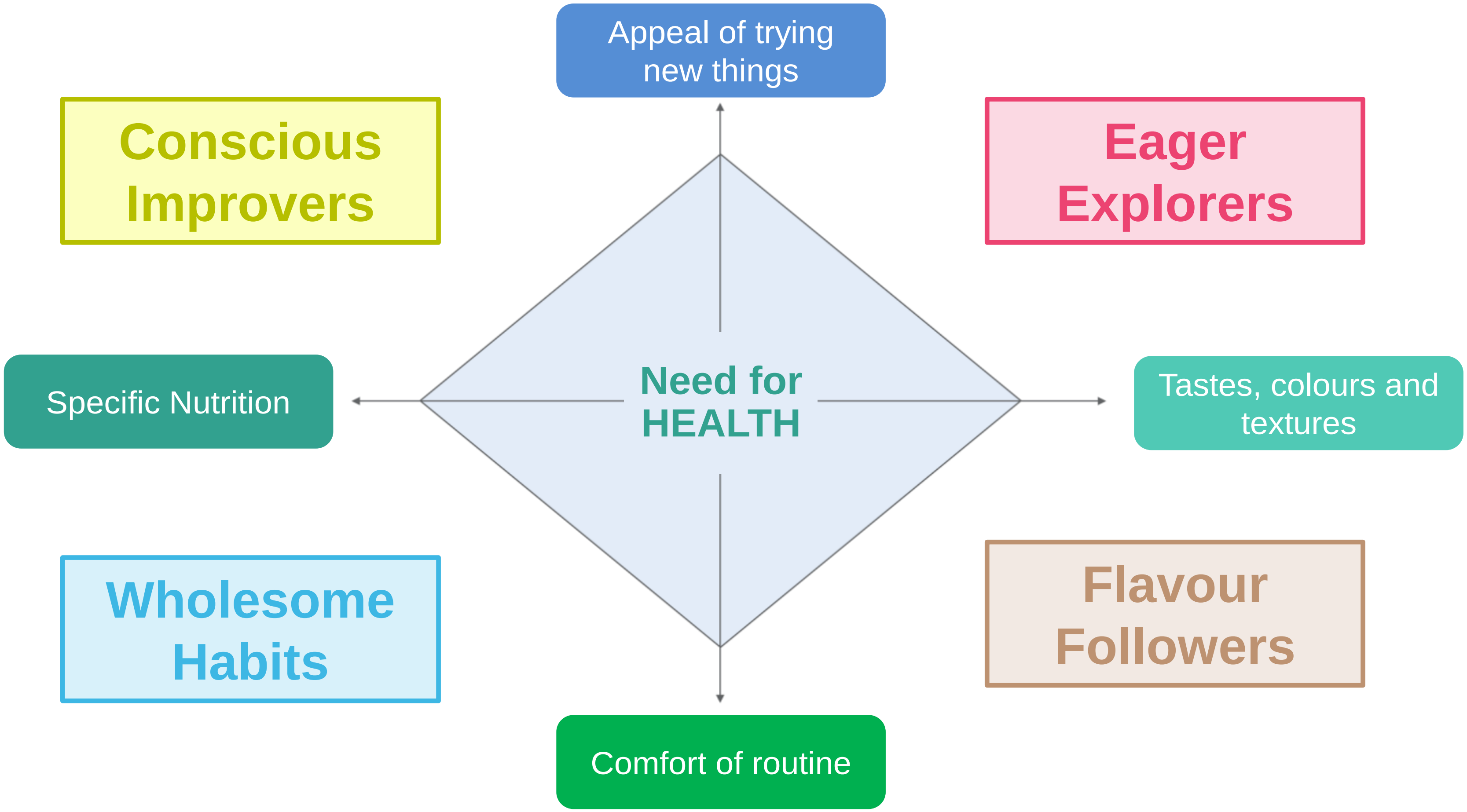


The result is four distinct segments of consumers in the market place



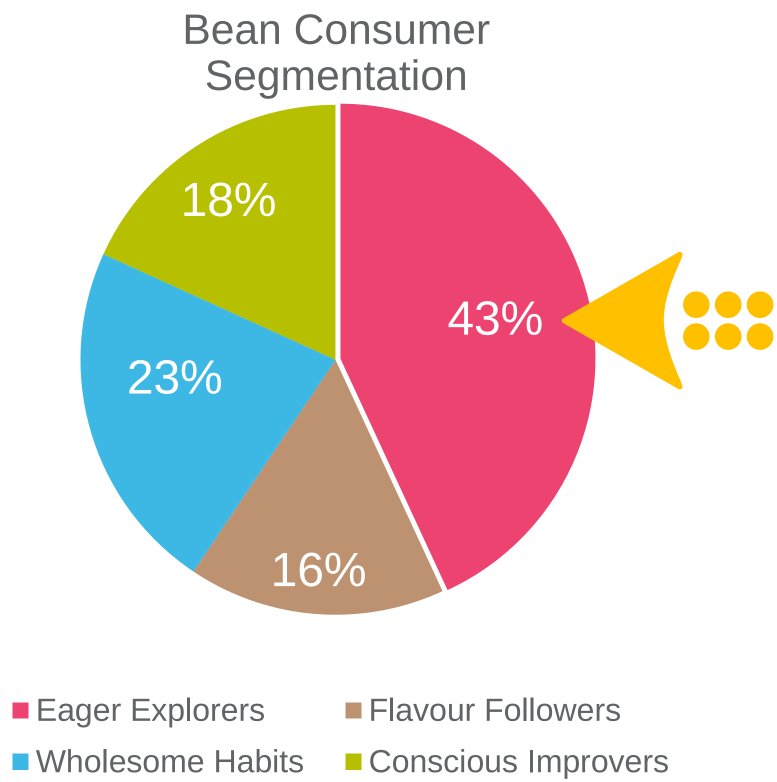
The segment names reflect behaviours and core needs

The segments are named to reflect behaviours and core needs



Bean Grower Action Plan

Target: Eager Explorer consumers



Your vegetable appeals to the **Eager Explorer** consumers. These people are interested in the taste, colour and texture of beans.

Be more relevant by:

These consumers are more likely to try new varieties of beans, such as snake, purple and white.

To encourage purchase of beans offer tastings and demonstrations on the spot to encourage trial.

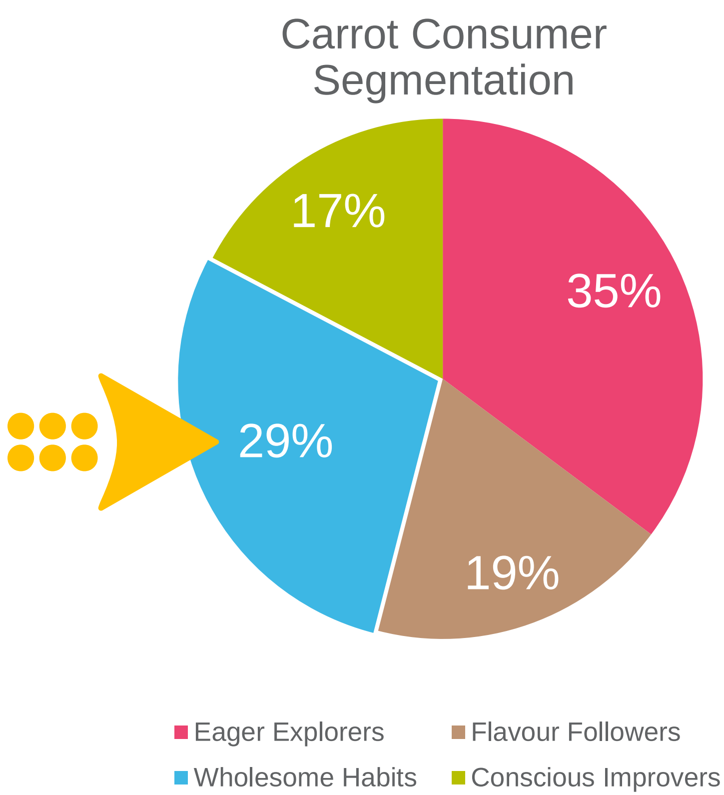
However they can be unsure of the 'rules'; what will each bean type bring to the dish and how is it best incorporated.

Educate how to get the best out of each variety.

**The target consumer segment is based on which segments this vegetable over indexes compared to Total Vegetable Consumers. It is not based solely on the size of the segment.*

Carrot Grower Action Plan

Target: Wholesome Habits consumers



Your vegetable appeals to the **Wholesome Habits** consumers. These people eat carrots routinely, and are not looking for anything new.

Be more relevant by:

Providing meal occasion ideas at the point of sale (information triggers) and new product formats (lunch & snack sizes).

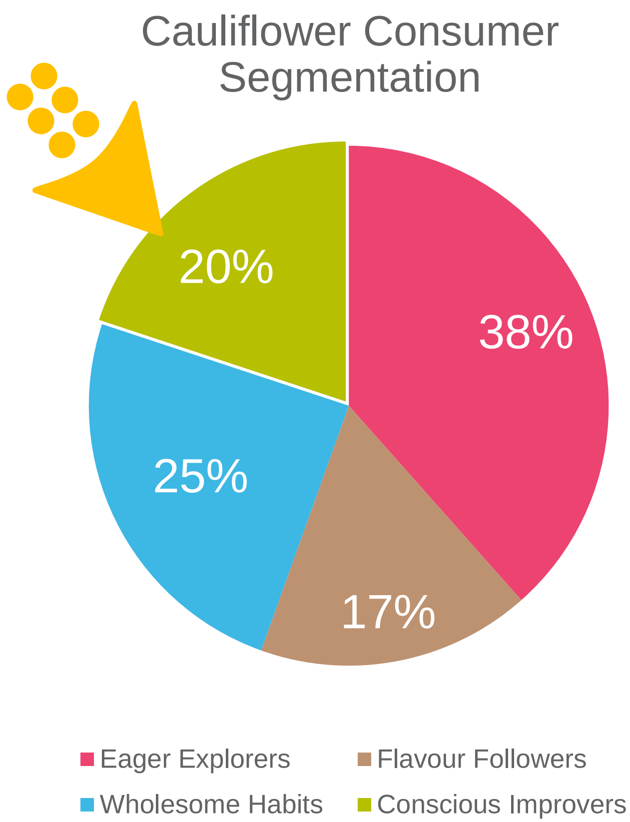
Investigate convenient new products that are packaged and prepared, they should include core popular vegetables, such as carrots and potatoes.

Promote the ‘ease of cooking’ on packaging and in-store to increase frequency of purchase.

**The target consumer segment is based on which segments this vegetable over indexes compared to Total Vegetable Consumers. It is not based solely on the size of the segment.*

Cauliflower Grower Action Plan

Target: Conscious Improver consumers



Your vegetable appeals to the **Conscious Improvers** consumers. These people select veggies based on the nutritional benefits.

Be more relevant by:

Be clear about the health benefits of cauliflower. Provide specific nutritional information and health benefits like Recommended Daily Intake (RDI%) in-store and on-pack.

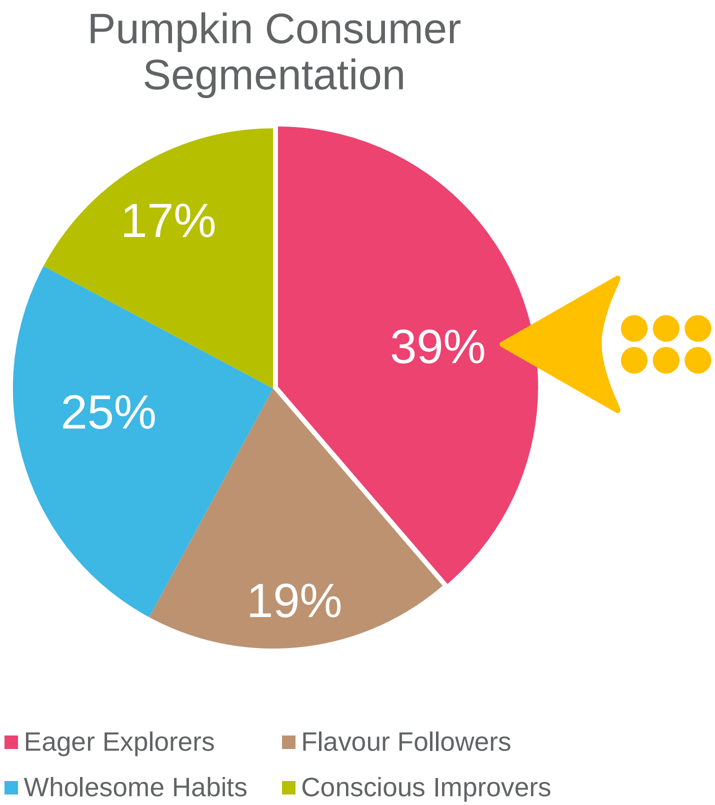
Seek exposure in the media as a 'superfood' and paleo diet choice (alternative to rice). Media coverage can keep cauliflower top of mind and trigger trial.

Talk to local hospitality businesses about featuring locally grown, 'superfood' cauliflower on their menu to spark the interest of Conscious Improvers. Consumers can be influenced by dishes that they have seen in restaurants as long as they know the positive health benefits.

**The target consumer segment is based on which segments this vegetable over indexes compared to Total Vegetable Consumers. It is not based solely on the size of the segment.*

Pumpkin Grower Action Plan

Target: Eager Explorer consumers



Your vegetable appeals to the **Eager Explorer** consumers. These people are interested in the taste, colour and texture of pumpkin.

Be more relevant by:
Clearly differentiate the multiple types of pumpkin by highlighting their taste and flavour profiles, and their optimal cooking styles i.e. Mild and creamy pumpkin, a great addition to soup.
These consumers are not afraid to try new things, provide in-store recipe cards that highlight pumpkin as a versatile vegetable for exotic cuisines, such as Turkish, Japanese and South American.

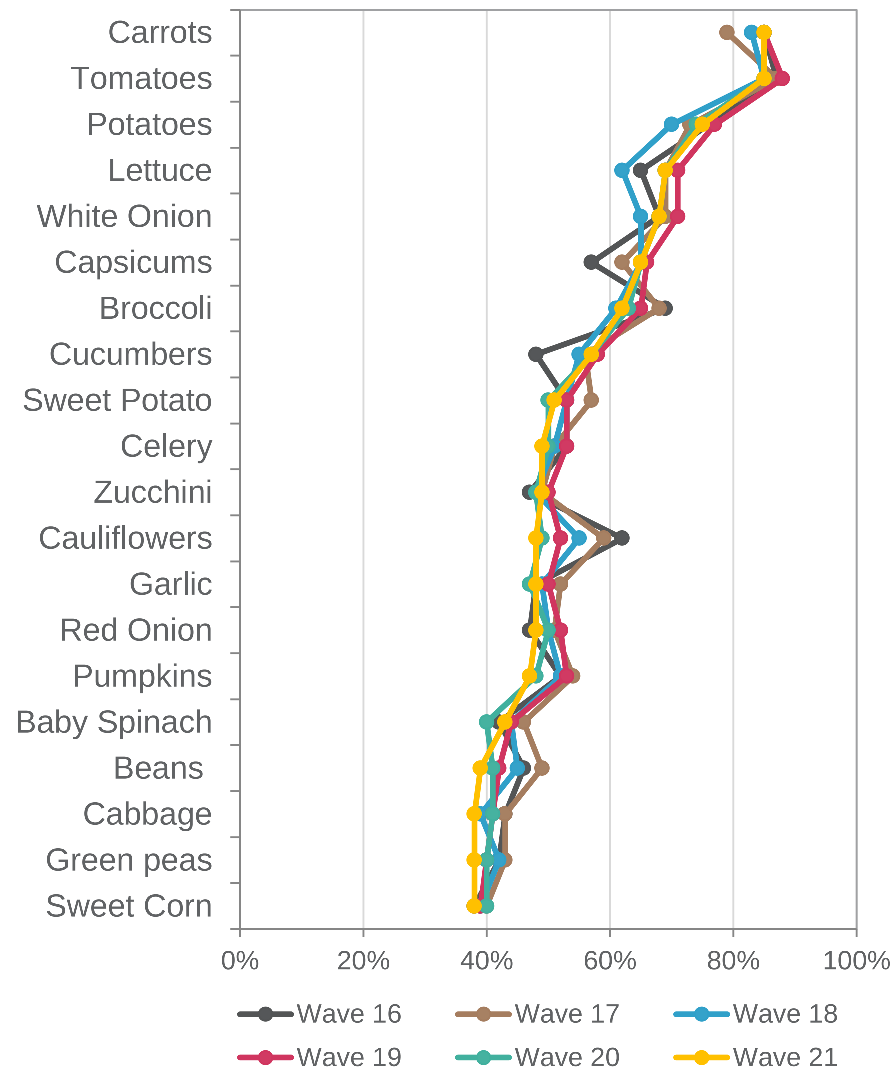
**The target consumer segment is based on which segments this vegetable over indexes compared to Total Vegetable Consumers. It is not based solely on the size of the segment.*

Wave 21: Overall Vegetable Tracking

Vegetables purchased last month are consistent with previous waves.

Carrots, tomatoes, potatoes and lettuce were the top vegetables purchased in February 2015.

Cauliflower has seen the greatest decline in purchase across the six months.



Sample Wave 21 N=1048
S8. Which of the following fresh vegetables have you purchased in the last month?

Category Health Explained

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

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

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

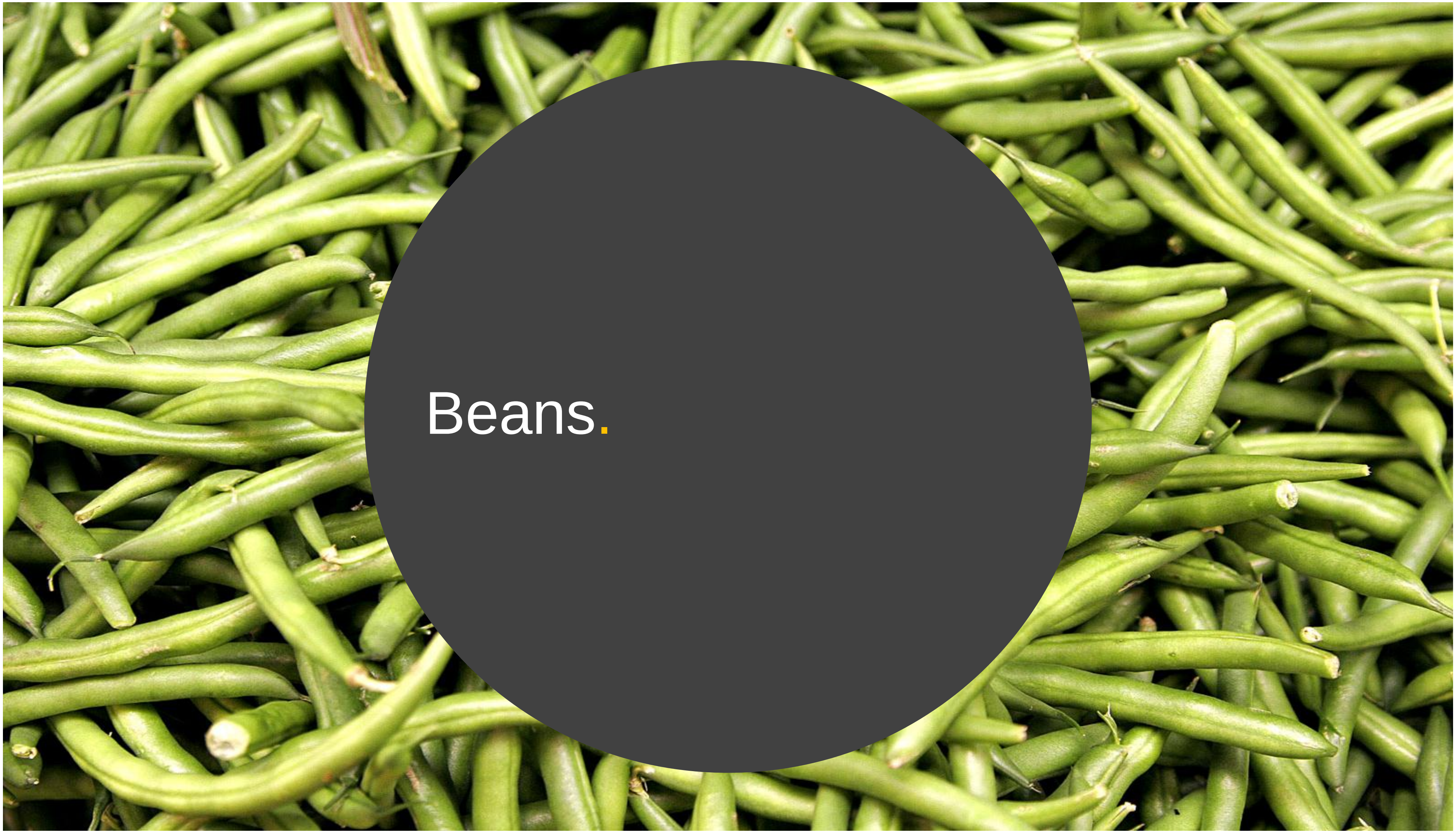
Pumpkin holds strong satisfaction with consumers and recommendation to family and friends is high.

Importance and interest in new varieties is low for carrots and cauliflower. This is reflected in lower than average future purchase intent. These categories are lacking consumer engagement.

Beans continually have low satisfaction. Further investigation is required to understand what is driving dissatisfaction.

	Beans	Carrot	Cauliflower	Pumpkin	Harvest Total Mean
Importance	6.3	5.2	4.9	6.7	6.2
Satisfaction	6.1	6.8	6.4	6.9	6.6
Endorsement	6.4	6.8	6.6	7.1	6.8
Interest (New Types)	6.0	5.3	5.6	6.3	6.1
Future Purchase More Same Less	 12% 87% 1%	 8% 91% 1%	 12% 87% 1%	 10% 88% 1%	 14% 84% 2%

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


Beans.

Purchase and consumption of beans have fallen this wave.

Purchase from specialist retailers has seen a substantial increase over the last three waves.

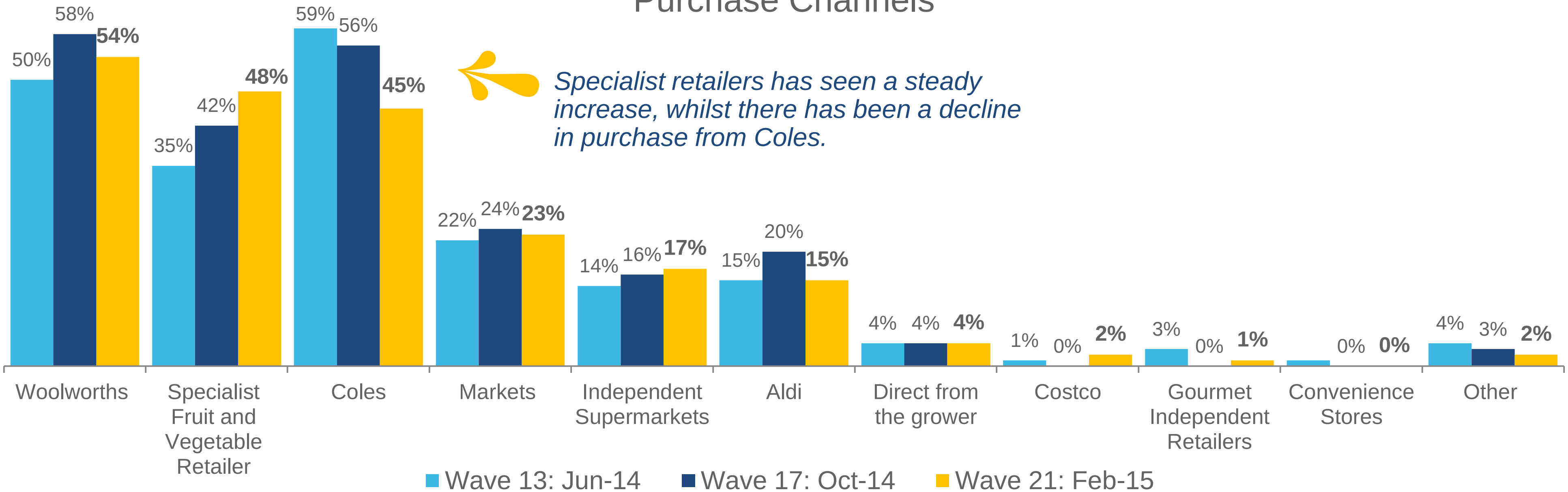
Average Purchase **3.5** times per month

▲ 3.6 times, Wave 13
▲ 3.6 times, Wave 17

Average Consumption **7.0** times per month

▲ 8.4 times, Wave 13
▲ 8.4 times, Wave 17

Purchase Channels



Q1. On average, how often do you purchase French and runner beans?
Q2. On average, how often do you consume French and runner beans?
Q5. From which of the following channels do you typically purchase French and runner beans?
Sample, Wave13 N=305, Wave 17 N=279, Wave 21 N=309

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

Typical purchase of 600g remains stable across waves. Value perceptions of beans are driven higher this month, even though recalled last spend has increased.

Average weight of purchase

The typical consumer purchased **600g** of beans, which was consistent with the previous waves.

— 600g, Wave 13
— 600g, Wave 17

Recalled last spend

Recalled last spend on bean purchase was **$3.70**, showing slight increase over the previous months.

▼ $3.60, Wave 13
▼ $3.50, Wave 17

Value for money

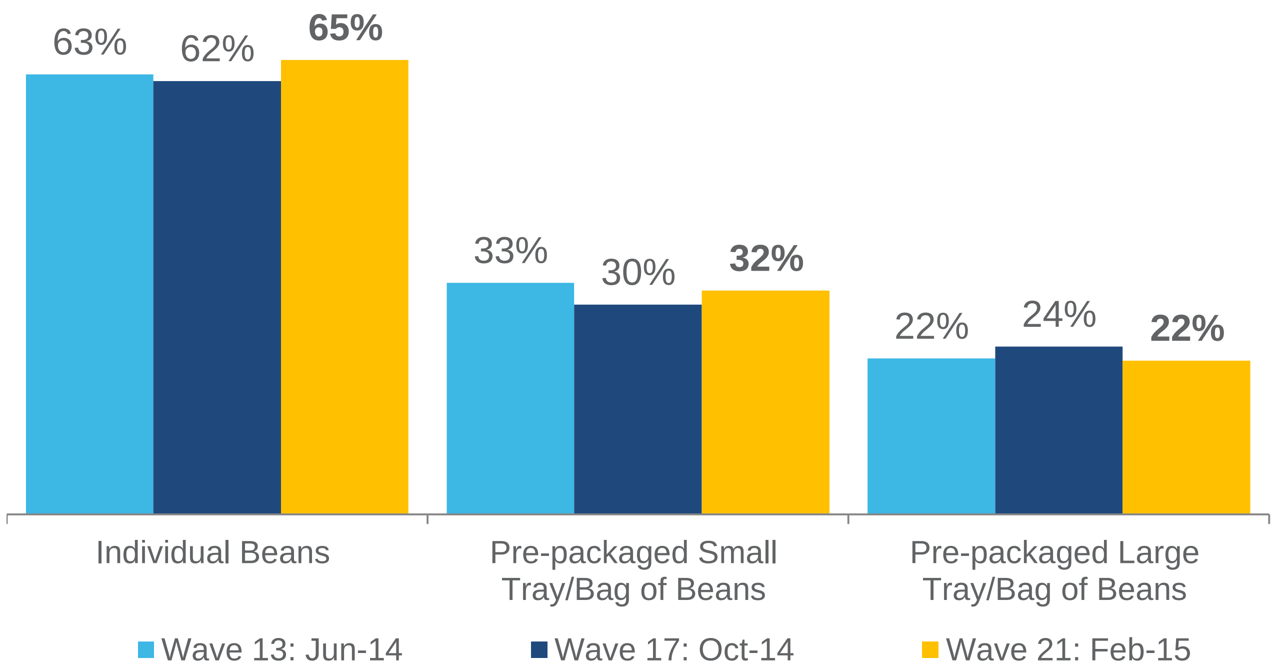
Consumer's perceived value for money was good **(6.3/10)**, showing an increase across waves.

▼ 5.9/10, Wave 13
▼ 6.0/10, Wave 17

Q3. How much French and runner beans do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is?
Sample, Wave13 N=305, Wave 17 N=279, Wave 21 N=309

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

Loose beans remain the most common format purchased, with a large increase in the number of beans purchased per shop.

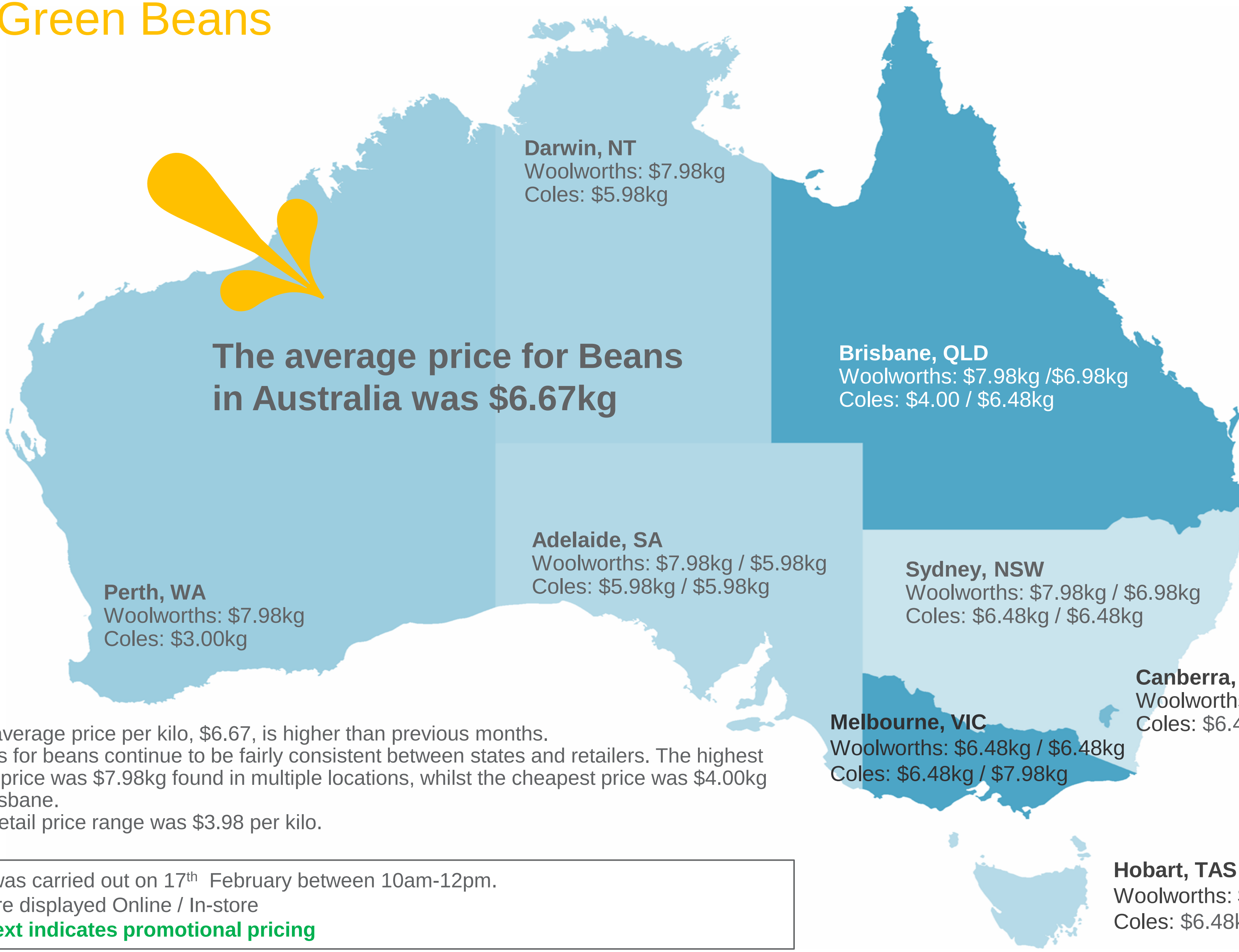


Average number purchased	Individual Beans	Small Tray	Large Tray
Wave 13: June 2014	68.3	1.3	1.2
Wave 17: October 2014	49.1	1.3	1.3
Wave 21: February 2015	87.3	1.3	1.1

Q3a. How much French and runner beans does this typically equate to?
Sample, Wave13 N=305, Wave 17 N=279, Wave 21 N=309

Online and In-store Commodity Prices

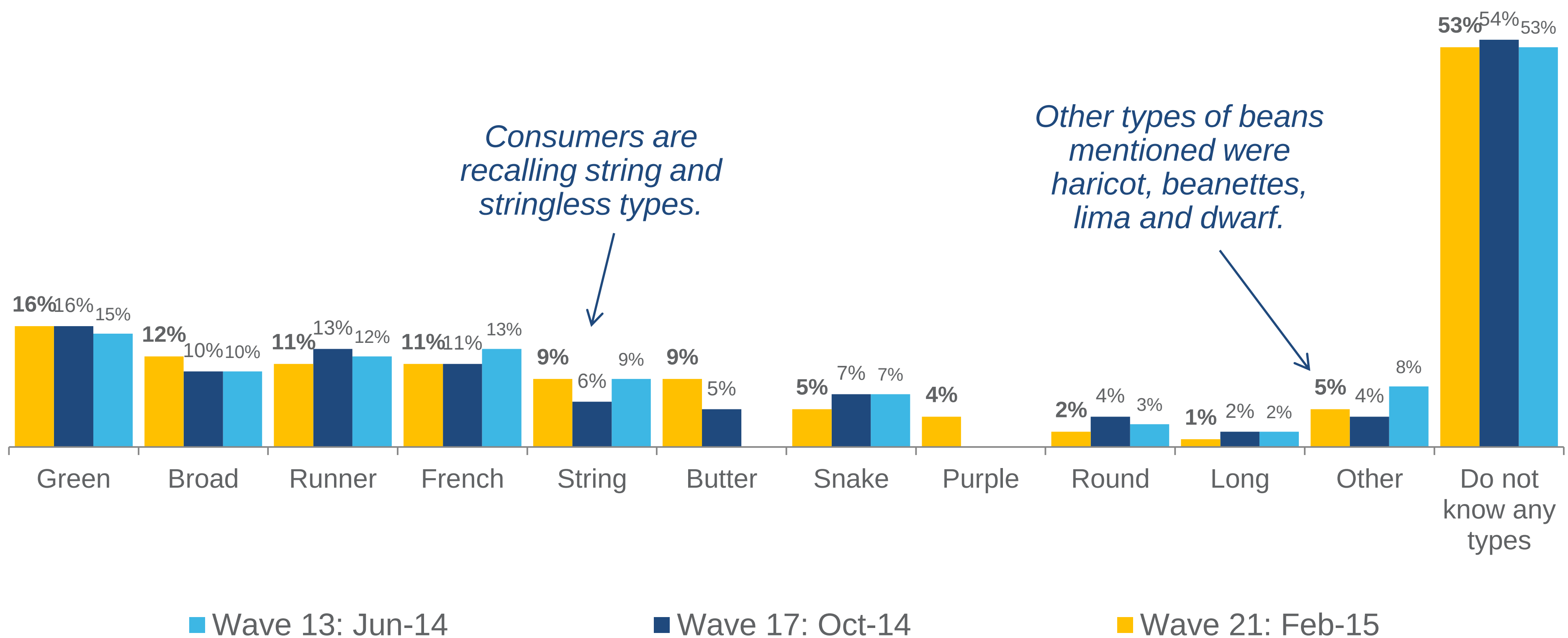
Green Beans



- The average price per kilo, $6.67, is higher than previous months.
- Prices for beans continue to be fairly consistent between states and retailers. The highest retail price was $7.98kg found in multiple locations, whilst the cheapest price was $4.00kg in Brisbane.
- The retail price range was $3.98 per kilo.

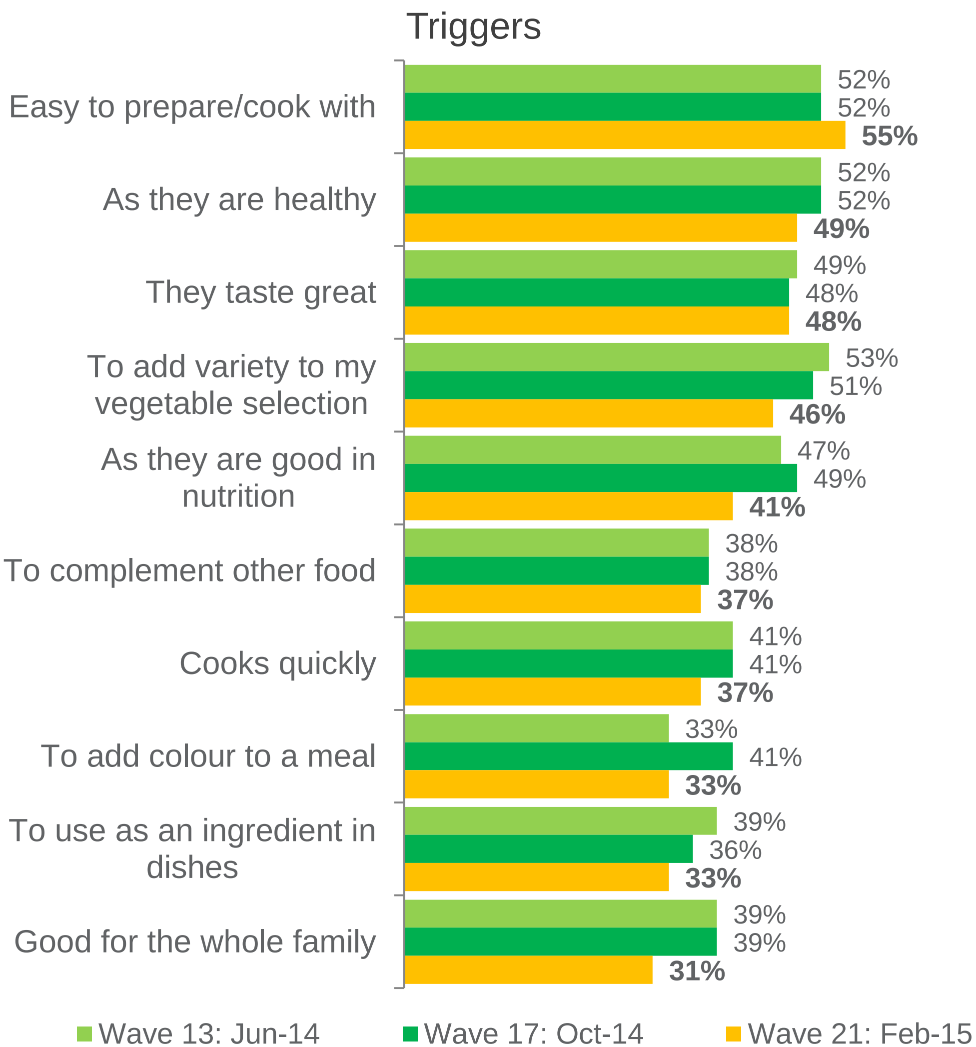
Pricing was carried out on 17th February between 10am-12pm.
Prices are displayed Online / In-store
Green text indicates promotional pricing

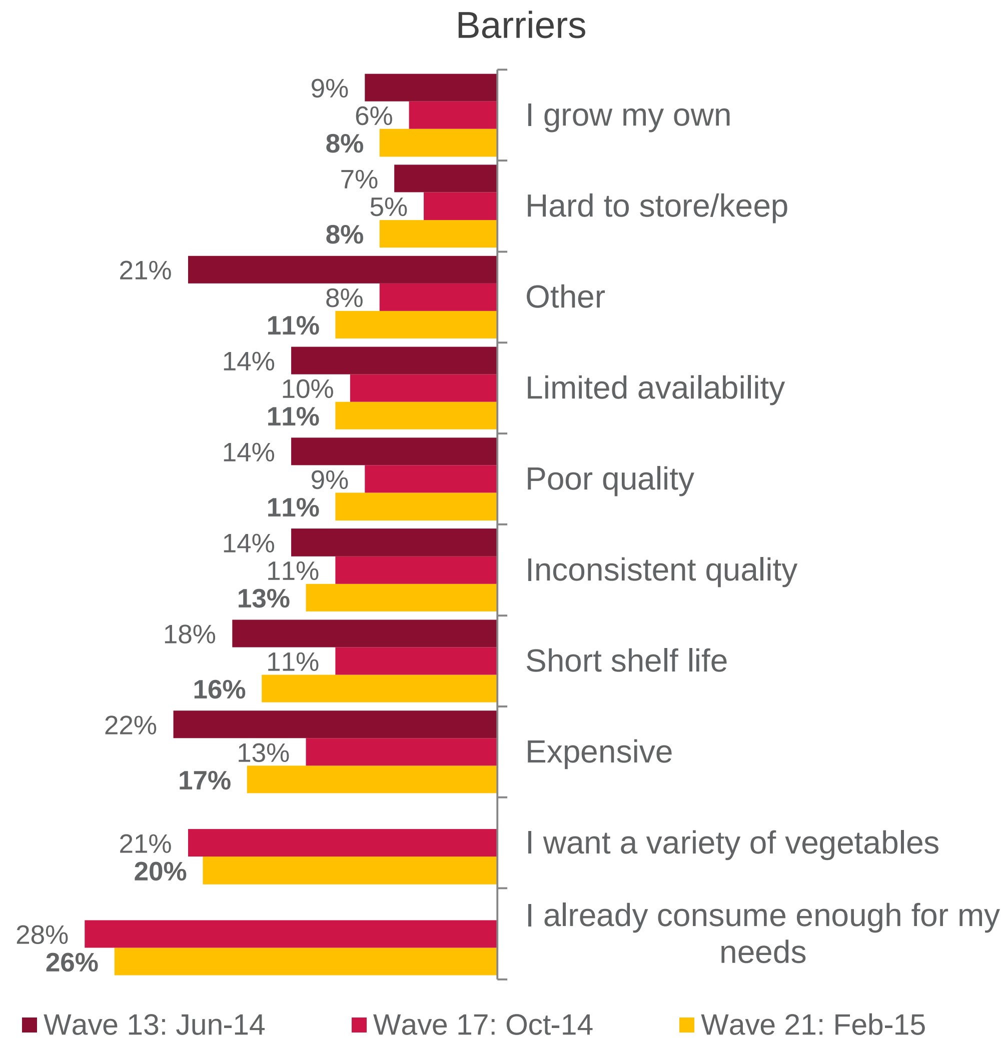
Awareness of bean types has remained consistent across waves and is overall very low.



Q6a. What varieties/types of French and runner beans are you aware of? (unprompted)
Sample, Wave13 N=305, Wave 17 N=279, Wave 21 N=309

Easy to prepare and cook is the primary motivation to purchase beans. Health and taste are secondary triggers. Consuming enough for their needs is the key barrier to purchase.





Q7. Which of the following reasons best describes why you purchase French and runner beans?
Q8. Which reason best describes why you don't buy French and runner beans more often?
Sample, Wave13 N=305, Wave 17 N=279, Wave 21 N=309

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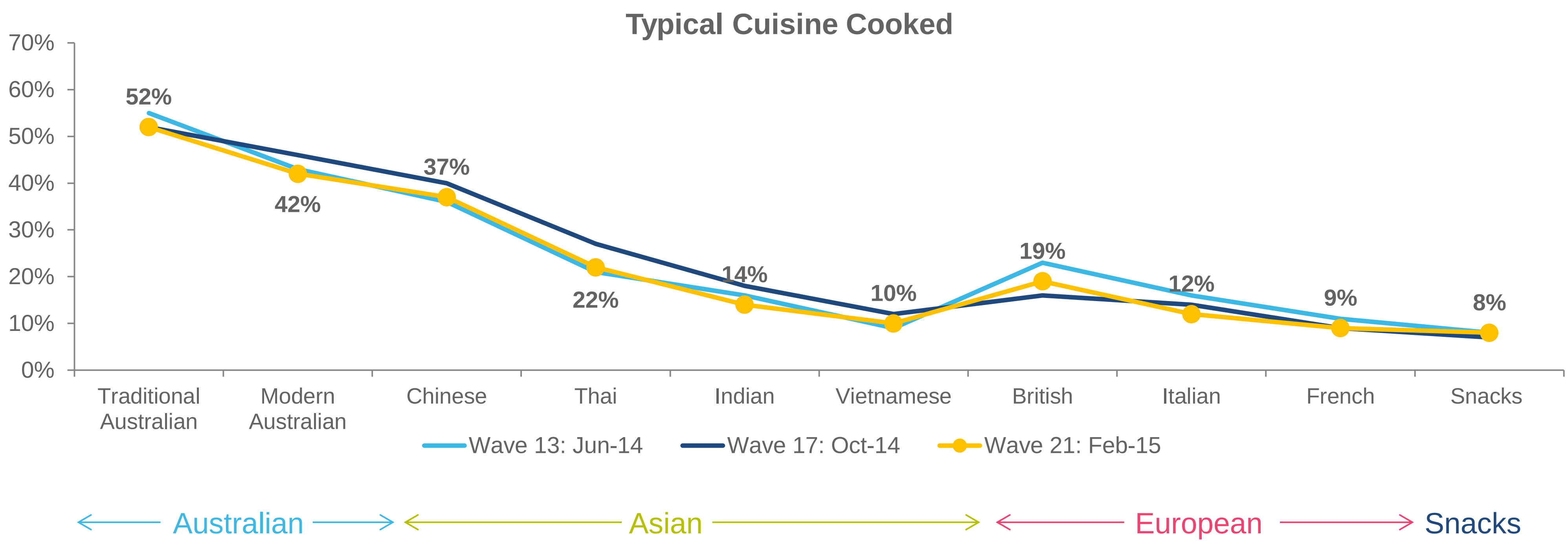
Cooking cuisines are on trend with previous months.
Dinner remains the key meal occasion for beans.

Top 5 Consumption Occasions

	Wave 21	Wave 17	Wave 13
Weekday Dinner	**64%**	63% ▼	59% ▼
Weekend Dinner	**41%**	44% ▲	36% ▼
Every-day	**37%**	34% ▼	32% ▼
Family meals	**36%**	33% ▼	38% ▲
Quick Meals	**22%**	29% ▲	24% ▲



Q10. What cuisines do you cook/consume that use French and runner beans?
Q11. Which of the following occasions do you typically consume/use French and runner beans?
Sample, Wave13 N=305, Wave 17 N=279, Wave 21 N=309

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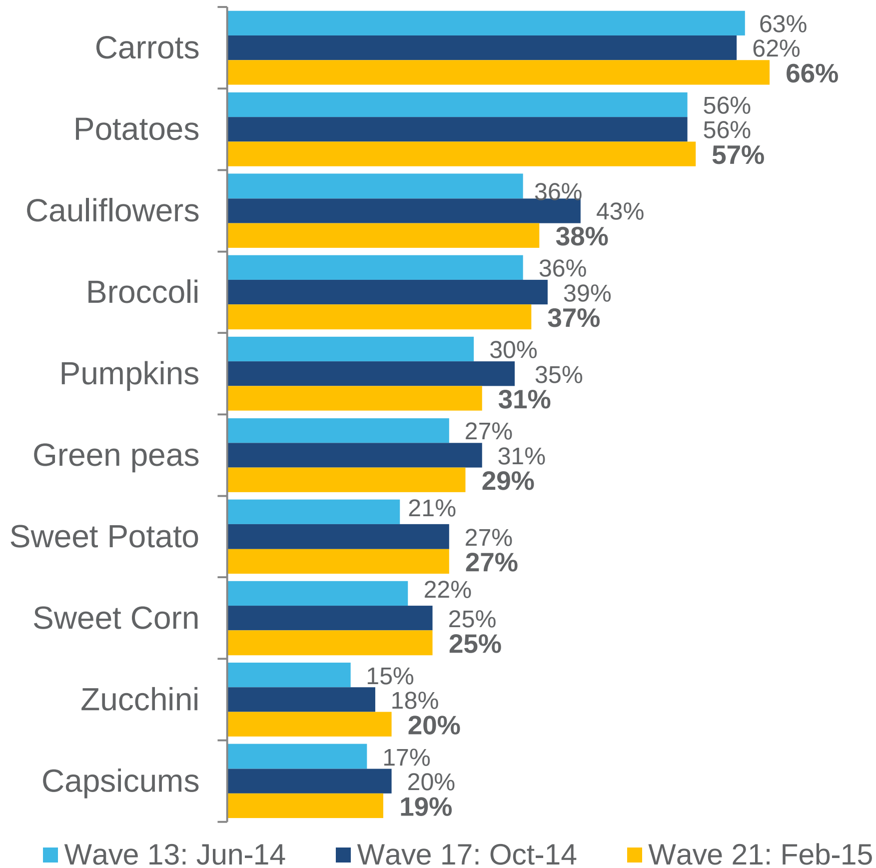
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

This wave consumers are more likely to serve beans with carrots and potatoes. Steaming and stir-frying remain the key cooking styles. There has also been a steady increase in boiling beans across waves.

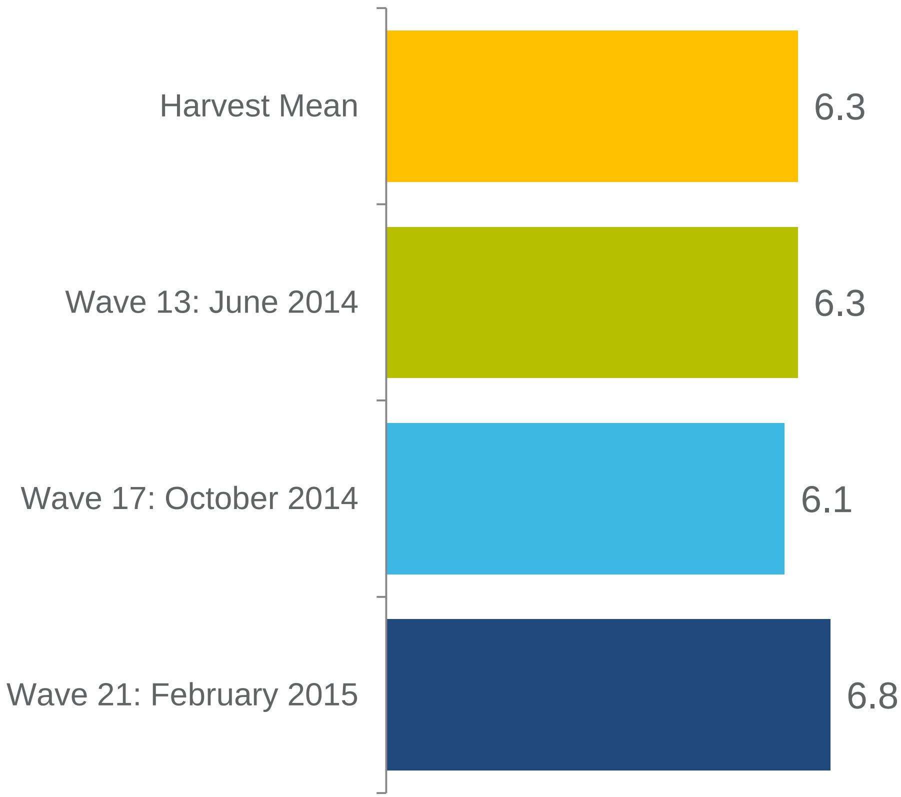
Top 10 Accompanying Vegetables



Top 10 Cooking Styles			
	Wave 13	Wave 17	Wave 21
Steaming	53%	52%	52%
Stir frying	42%	48%	48%
Boiling	35%	38%	40%
Microwave	23%	23%	22%
Raw	12%	15%	13%
Blanche	16%	14%	13%
Soup	14%	12%	11%
Stewing	10%	12%	10%
Sautéing	9%	10%	10%
Shallow Frying	3%	5%	6%

Q9. How do you typically cook French and runner beans?
Q10a. And when are you serving French and runner beans which of the following do you also serve together with this?
Sample, Wave13 N=305, Wave 17 N=279, Wave 21 N=309

There is a substantial increase in the importance of provenance for beans this wave, which is most likely due to the increased media coverage around this issue.



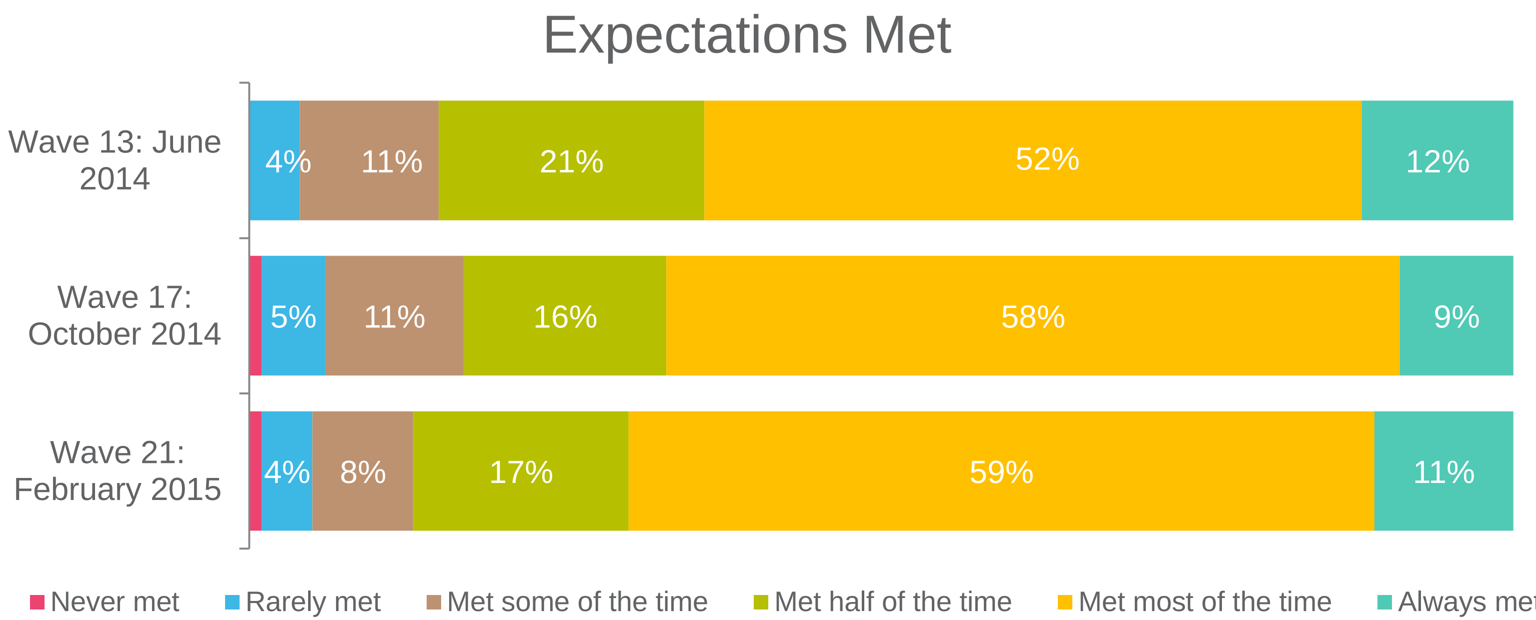
Q14. When purchasing <commodity>, how important is Provenance to you?
Sample, Wave13 N=305, Wave 17 N=279, Wave 21 N=309

Beans are expected to stay fresh for one week once purchased, which is consistent across waves.

Expectations of freshness have increased over the past months, and are generally being met.

Expected To stay fresh for **7.1** days

▲ 7.2 days, Wave 13
▲ 7.2 days, Wave 17



Q12. How long do you expect French and runner beans to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy French and runner beans?
Sample, Wave13 N=305, Wave 17 N=279, Wave 21 N=309

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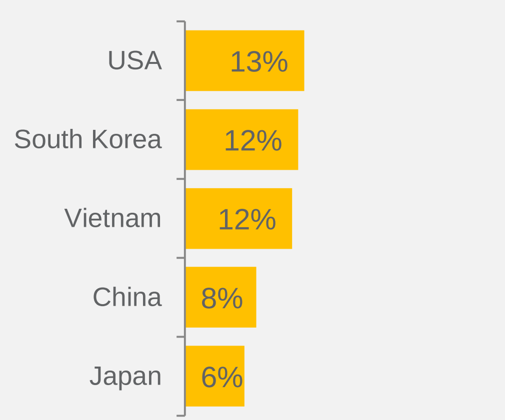
Bean Product Launch Trends.

Bean Global NPDs
December 2014 – February 2015

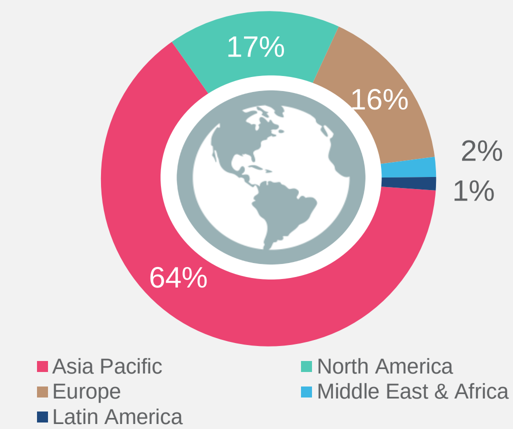
156 products containing green beans were launched globally in the last three months. Asia Pacific was the key region for launches. Baked goods and meals were top categories with health and convenience claims utilised most.

Country

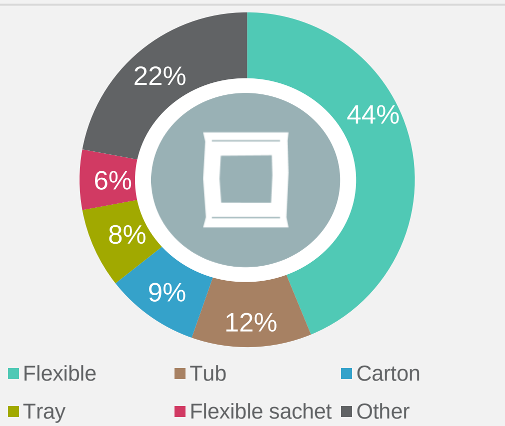


156 Global NPDs

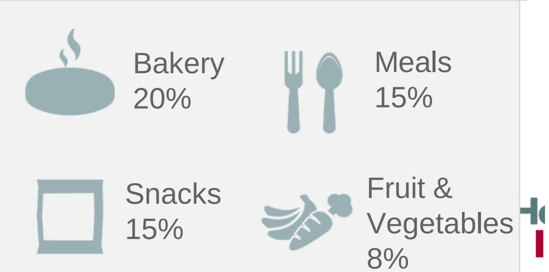
Region



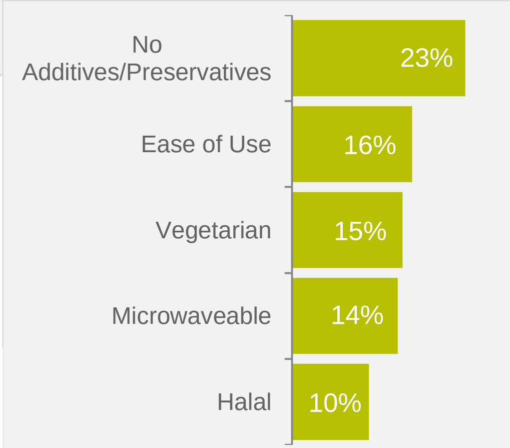
Top Pack Formats



Categories



Top Claims



Bean Product Launches:
Last 3 Months (December 2014 – February 2015)
Summary

- A total of 156 products containing French and Runner beans as an ingredient were launched globally in the last 3 months, which is consistent with previous trends.
- There were no products launched in Australia in the past three months.
- Asia Pacific (64%) continued to be the top region for product launches.
- Flexible (44%) and tub (12%) packaging formats are consistently used for bean products launched.
- The top categories for product launches were baked goods (20%), meals (15%) and snacks (15%), consistent with top 3 launches in previous waves.
- The core claims used for these launches globally were no additives/preservatives (23%), ease of use (16%) and vegetarian (15%).
- The most innovative launch was a fresh green vegetable mix from France, with the ability to microwave or panfry with a basil seasoning . Examples of innovative green bean products can be found on the following slides.

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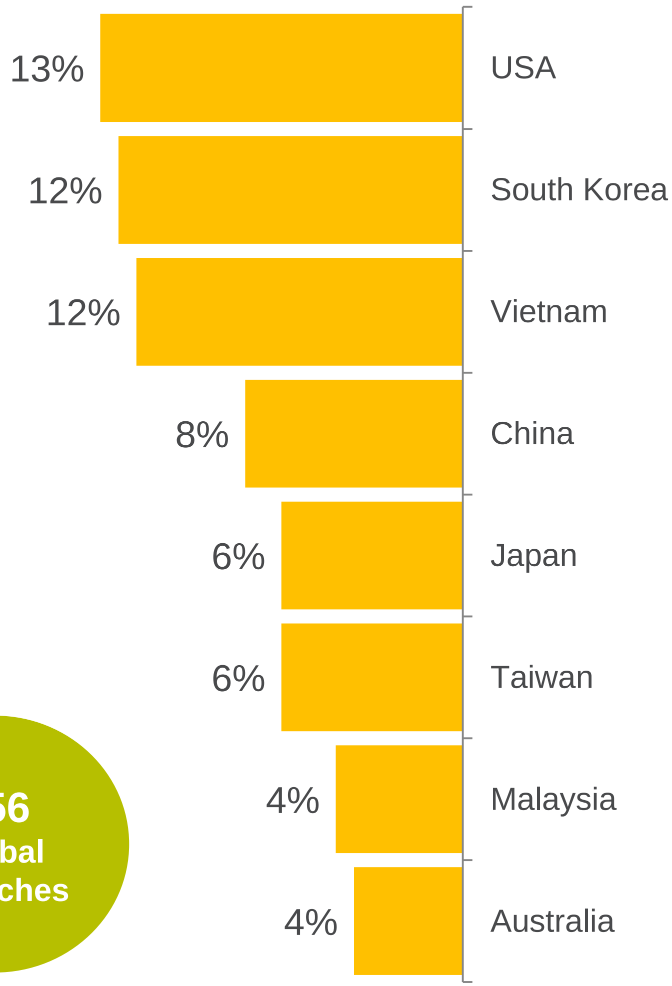
Source: Mintel (2014)

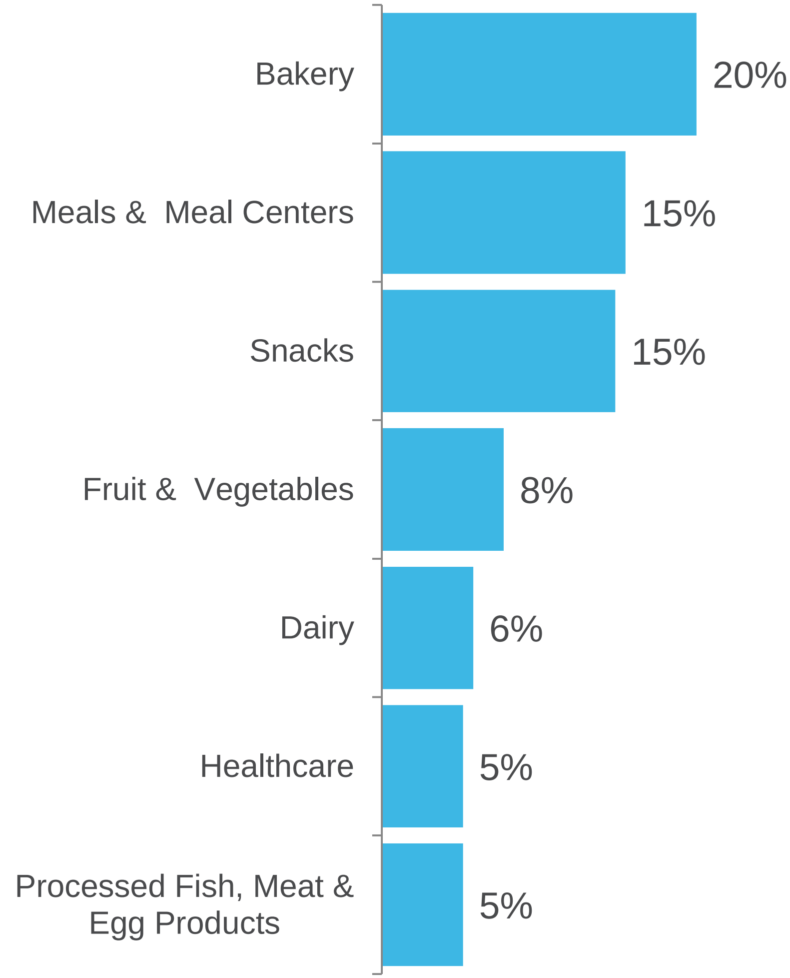
Bean Launches
Country, Region & Categories

- USA was the key country for green bean product launches, followed by South Korea and Vietnam.
- Bakery, meals and snack products were the top categories for launches, consistent with previous trends. Bakery has returned to levels consistent with Wave 13 (April-June 2014) after a peak of 64 launches during Wave 17 (August–October 2014).

Top Launch Countries



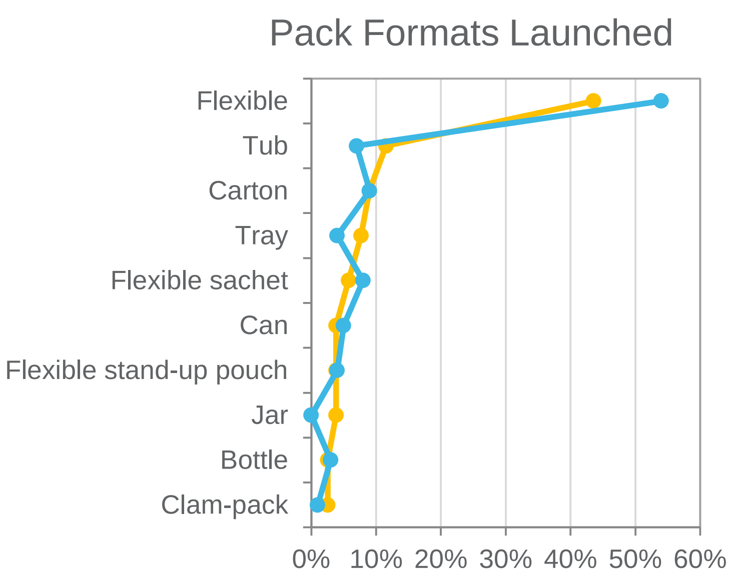
Top Launch Categories

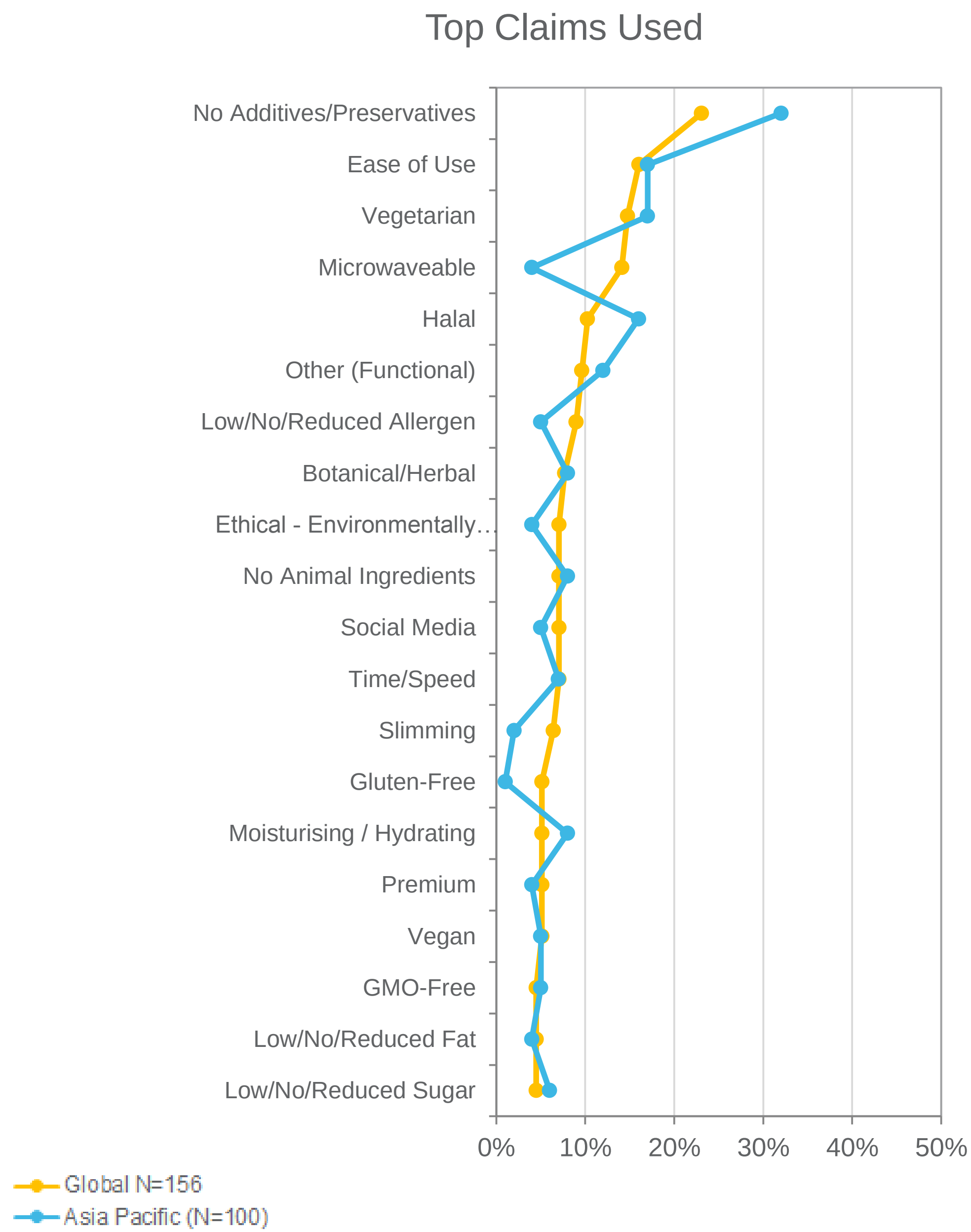


Number of Global Beans NPDs for the L3M N=156

Bean Launches
Top Claims & Pack Formats Used

- No additives/preservatives was the most prominent claim in Wave 21, driven by Asia Pacific launches. Ease of use and vegetarian were also common claims used.
- Globally the top pack formats used for product launches was flexible packaging and tubs, consistent with previous trends.





Number of Global NPDs for the L3M N=156
Only regions with n >30 are displayed

Innovative Bean Launches:
L3M (August – October 2014)

Bioglan Super Foods Supergreens Natural Tropical Flavour High Nutrient Superfood Powder (Sweden)

Contains 81 vital ingredients which provide the full spectrum of A-Z nutrients. This vegan and gluten free product provides a daily diet with all the goodness of 10 servings of fruit and vegetables, and can be added to water, juice or smoothies. These products retail in 100g packs and were on display at Natural Products Scandinavia 2014 in Malmö, Sweden.

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

Sanquan Numbing Hot Green Bean and Pork Dumplings (China)

Sichuan style dumplings wrapped with smooth pastry and filled with fresh pork meat. This product is free from any preservatives and retail in a 702g pack containing 36 pieces. The company is in partnership with a TV programme called Chef Nic, a Chinese food travelogue show starring Nicholas Tse and featuring different celebrity guests per episode.

Claims:
No Additives/Preservatives, Other (Functional)

Monoprix Green Vegetables for Frying (France)

Monoprix Poêlée de Légumes Verts (Green Vegetables for Frying) are new to the range. This product has a basil seasoning, can be microwave or pan heated, and retails in a partly recyclable 300g pack with two servings.

Claims:
Ethical - Environmentally Friendly Package, Microwaveable

Consum Sautéed Oriental Pasta (Spain)

Consum Salteado Pasta Oriental (Sautéed Oriental Pasta) has been repackaged in a newly designed 500g pack for two people. The product is ready in six minutes.

Claims:
No Additives/Preservatives, Low/No/Reduced Transfat, Time/Speed, Microwaveable

Source: Mintel (2015)

Innovative Bean Launches:
L3M (August – October 2014)

Waitrose Love Life Teriyaki Chicken & Noodle Salad (UK)

Waitrose Love Life Teriyaki Chicken & Noodle Salad comprises spiced chicken, mixed vegetables and noodle salad with a separate soy, lime and ginger dressing. The calorie controlled, low fat product contains 259kcal and seven Weight Watchers ProPoints. It retails in a 250g pack.

Claims:
Low/No/Reduced Fat, Low/No/Reduced Calorie, Slimming

Archer Farms Savor Everyday Green Bean Casserole with Mushrooms & Fried Onions (USA)

Archer Farms Savor Everyday Green Bean Casserole with Mushrooms & Fried Onions is now available. The product can be heated in the microwave or in the oven and retails in a 24-oz. pack.

Claims:
Microwaveable

Good Eats Instant Drink Mix of Green Beans (Taiwan)

Good Eats Instant Drink Mix of Green Beans is said to be made from 20 times concentrated green beans using a low temperature extraction process, which maintains the original nutrition. According to the manufacturer, green tea helps adjust body function and promote metabolism. The product is free from pesticide, heavy metals, and preservatives, and retails in a pack containing 30 x 2g units.

Claims:
No Additives/Preservatives, Other (Functional), Ethical - Environmentally Friendly Product

Pu Cheng Krispy Roll Snack with 15 Grains and Two Nuts (South Korea)

Pu Cheng Krispy Roll Snack with 15 Grains and Two Nuts are made with brown rice, corn, oat, wheat germ, sticky black rice, black sesame, sesame, barley, black soy, adlay, millet yam, red bean, green bean, pea, walnut and almond. The product retails in a 180g pack.

Claims:
Premium

Source: Mintel (2015)

Innovative Bean Launches:
L3M (August – October 2014)

Mrozna Kraina Greek Style Vegetable Mix for Frying (Poland)

Mrozna Kraina Warzywa na Patelnie po Grecku (Greek Style Vegetable Mix for Frying) is now available. The product comprises red onion, mushrooms, broccoli, mini carrots, potatoes, bean sprouts, green beans, sweetcorn, and white onion. It can be prepared in 15 minutes, and retails in a 450g pack including a Greek seasoning mix sachet, and featuring a recipe idea.

Claims:
NA

Asian+ Bami Goreng Noodle Meal (Denmark)

Asian+ Bami Goreng Nudelret (Bami Goreng Noodle Meal) is a ready meal, made following an Indonesian recipe, containing noodles with turkey meat, egg, vegetable pieces, prepared in a wok. The microwaveable product retails in an 800g pack.

Claims:
Ease of Use, Microwaveable

Mak Jah Green Bean Cakes (Malaysia)

Mak Jah Green Bean Cakes are traditionally prepared. The halal certified product is free from preservatives, and retails in a 320g pack, containing 10 pieces.

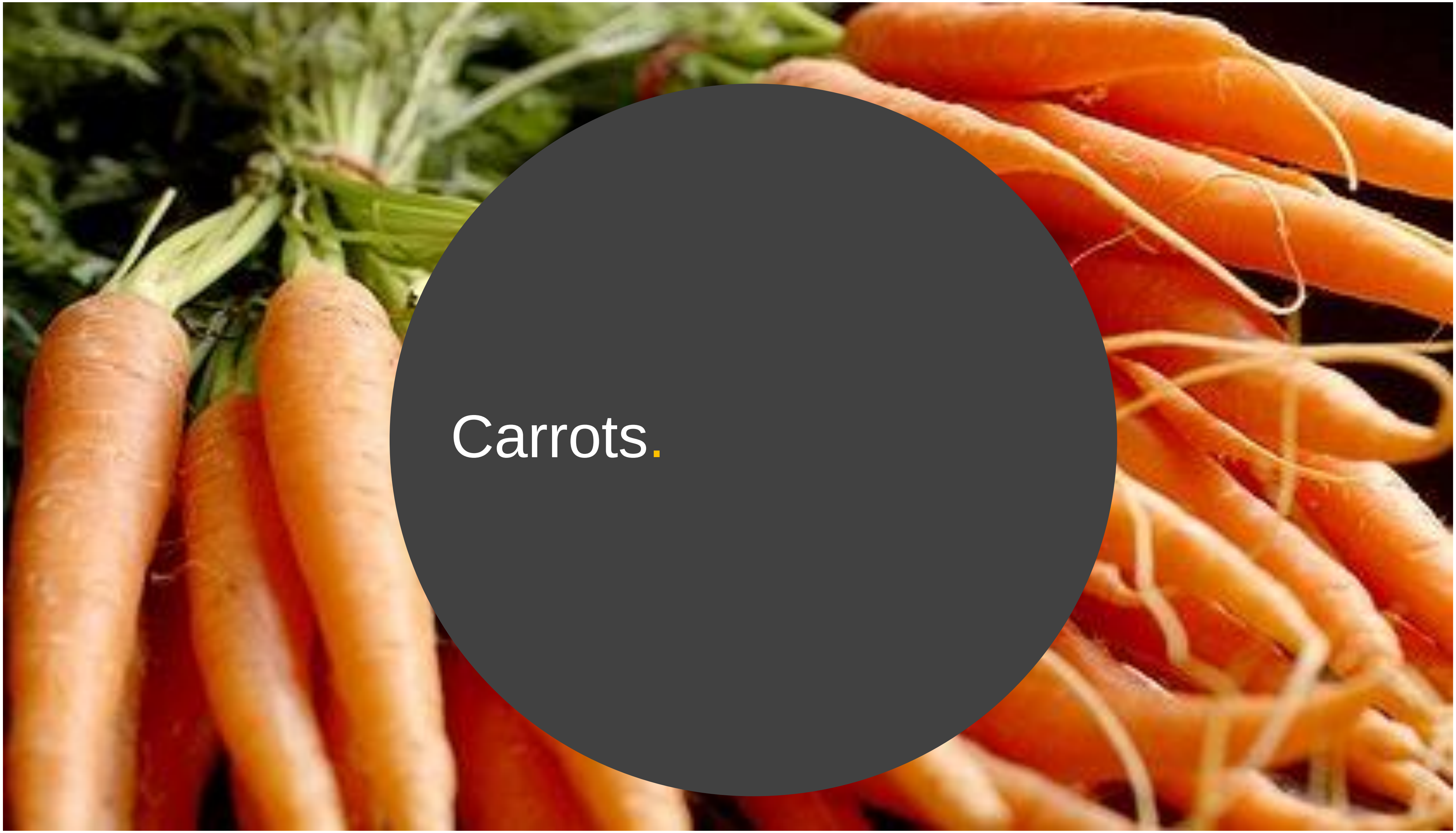
Claims:
Halal, No Additives/Preservatives, Social Media

AH Salade van de Maand Gado Gado Salad with Vegetable Strips (Netherlands)

AH Salade van de Maand Gado Gado Salad with Vegetable Strips comprises noodles, green beans, egg and a separate Javanese and Oriental dressing mix. This vegetarian product retails in a 490g recyclable pack which includes 65g Javanese dressing and 15g Oriental dressing mix, and bears the Healthy Choice logo.

Claims:
Gluten-Free, Low/No/Reduced Allergen, Vegetarian, Ethical - Environmentally Friendly Package

Source: Mintel (2015)



Carrots.

Purchase and consumption occasions are slightly down this month. However, carrots are consumed very frequently, almost once every second day.

There has been a decline in purchase from mainstream retailers and an increase in purchase from specialist retailers.

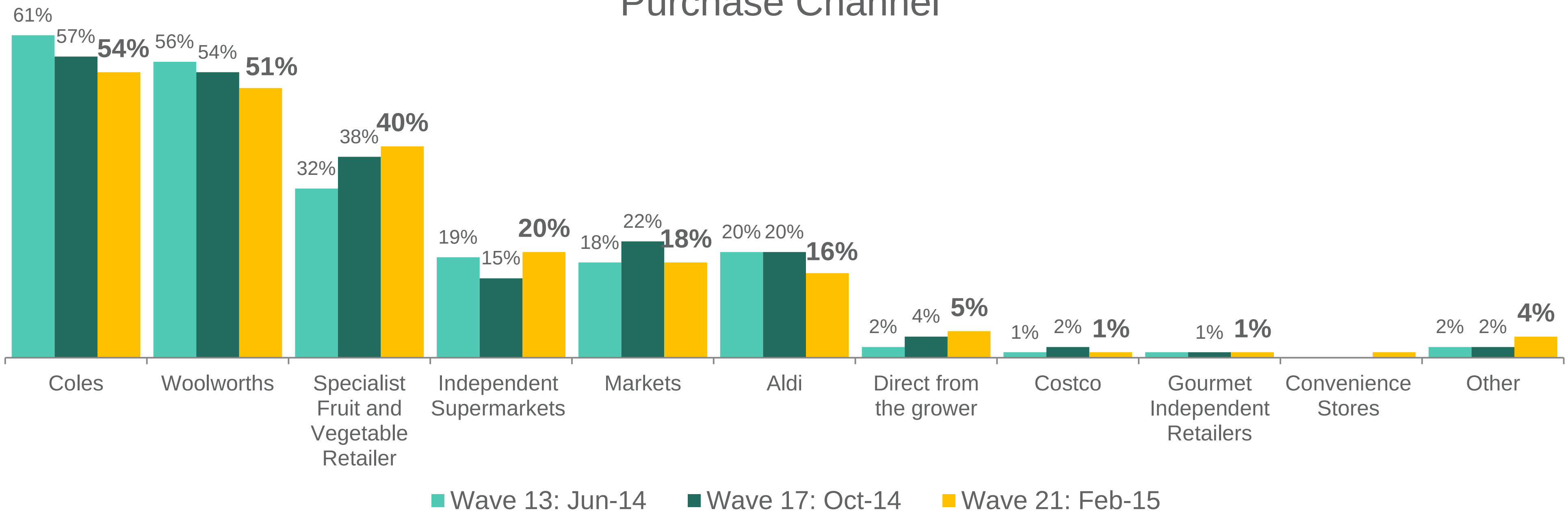
Average Purchase **3.7** times per month

▲ 4.1 times, Wave 13
▲ 3.8 times, Wave 17

Average Consumption **14.4** times per month

▲ 15.0 times, Wave 13
▲ 15.6 times, Wave 17

Purchase Channel



Q1. On average, how often do you purchase carrot?
Q2. On average, how often do you consume carrot?
Q5. From which of the following channels do you typically purchase carrot?
Sample Wave 13 N=314, Wave 17 N=306, Wave 21, N=312

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

Carrots are perceived as very good value for money, consistent across waves. On average consumers purchase 1 kg of carrots per shop.

Average weight of purchase

The typical consumer purchased **1.1kg** of carrots, which has decreased across the three waves.

▲ 1.3kg, Wave 13
▲ 1.2kg, Wave 17

Recalled last spend

Recalled last spend on carrots was **$2.40.** This is consistent with the previous wave.

▼ $2.30, Wave 13
– $2.40, Wave 17

Value for money

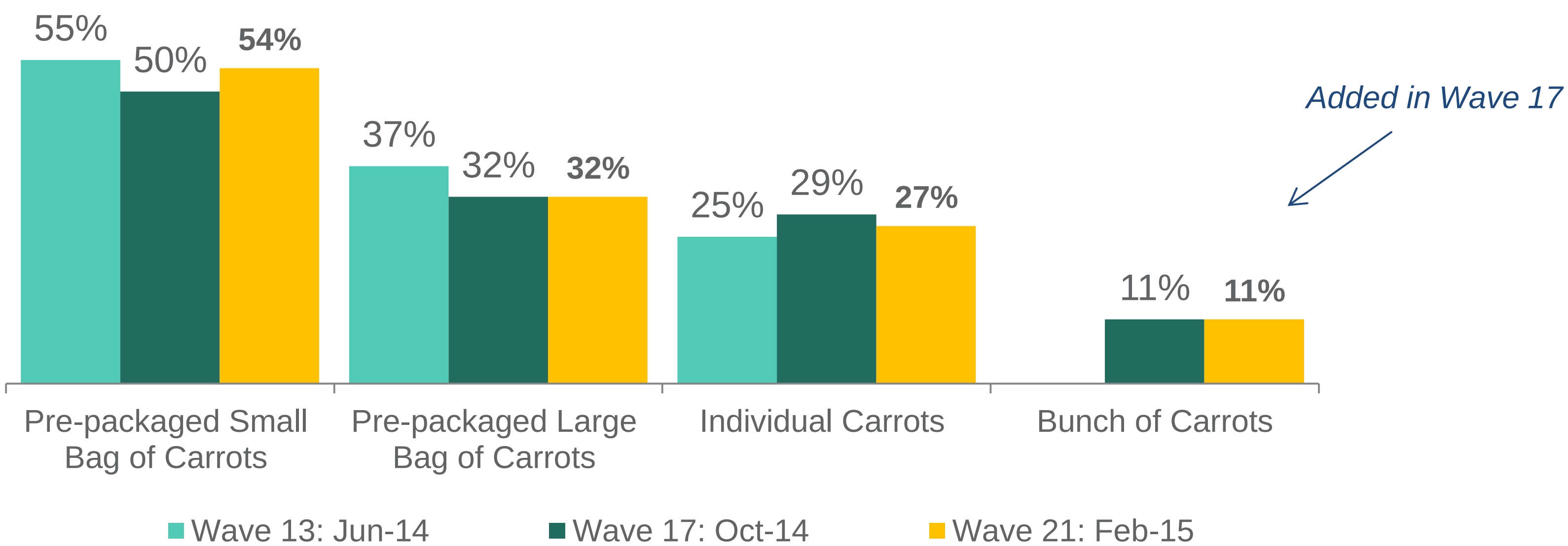
Consumer's perceived value for money is very good **(7.5/10)** and slightly higher than past waves.

▼ 7.3/10, Wave 13
▼ 7.4/10, Wave 17

Q3. How much carrot do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? 0-10 scale
Sample Wave 13 N=314, Wave 17 N=306, Wave 21, N=312

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

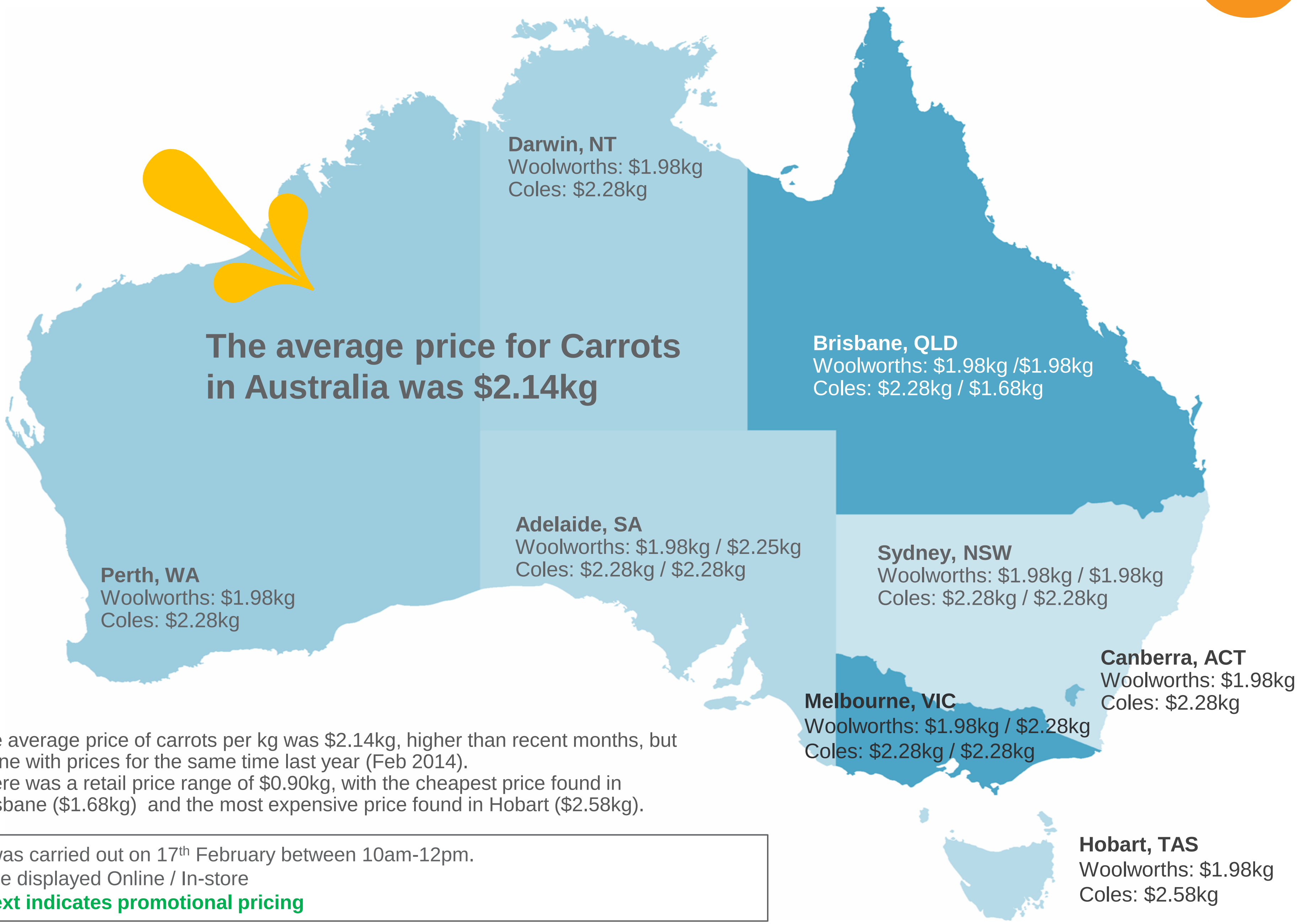
Small bags of carrots remain the primary format purchased.



Average number purchased	Small Bag	Individual Carrots	Large Bag	Bunch of Carrots
Wave 13: June 2014	1.5	5.5	1.5	-
Wave 17: October 2014	1.7	5.1	1.6	2.2
Wave 21: February 2015	1.6	5.3	1.8	2.5

Q3a. How much carrot does this typically equate to?
Sample Wave 13 N=314, Wave 17 N=306, Wave 21, N=312

Online and In-store Commodity Prices

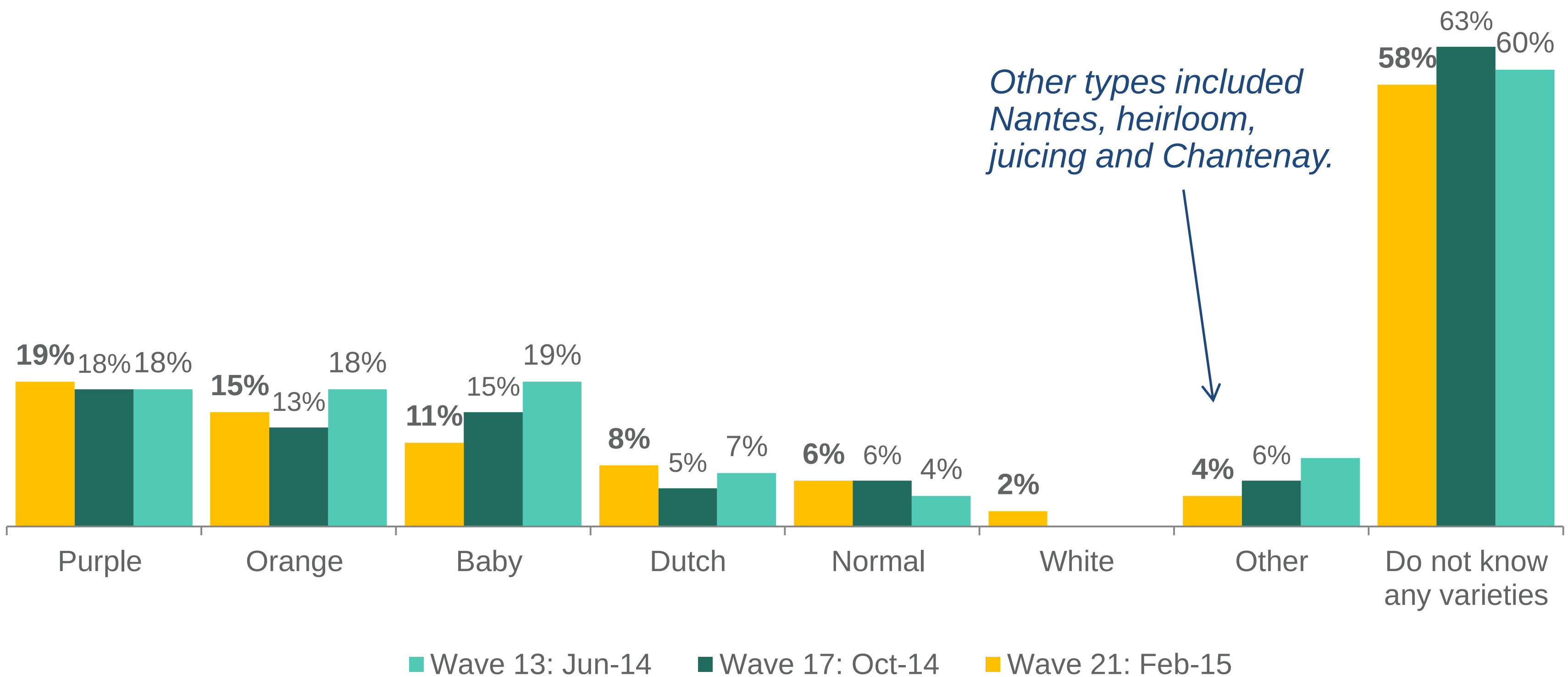


- The average price of carrots per kg was $2.14kg, higher than recent months, but in line with prices for the same time last year (Feb 2014).
- There was a retail price range of $0.90kg, with the cheapest price found in Brisbane ($1.68kg) and the most expensive price found in Hobart ($2.58kg).

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

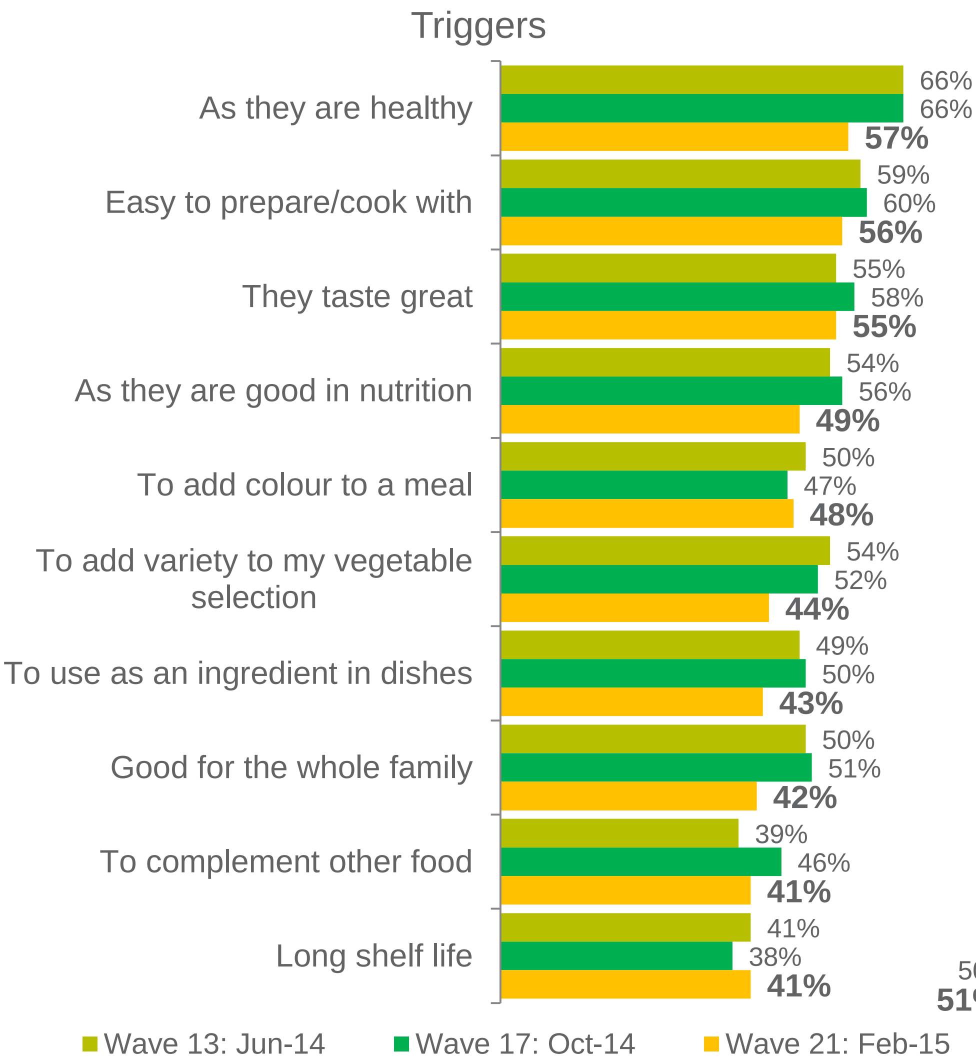
Over one half of consumers are unable to recall a type of carrot. Colour is the main trigger for unprompted carrot variety awareness.

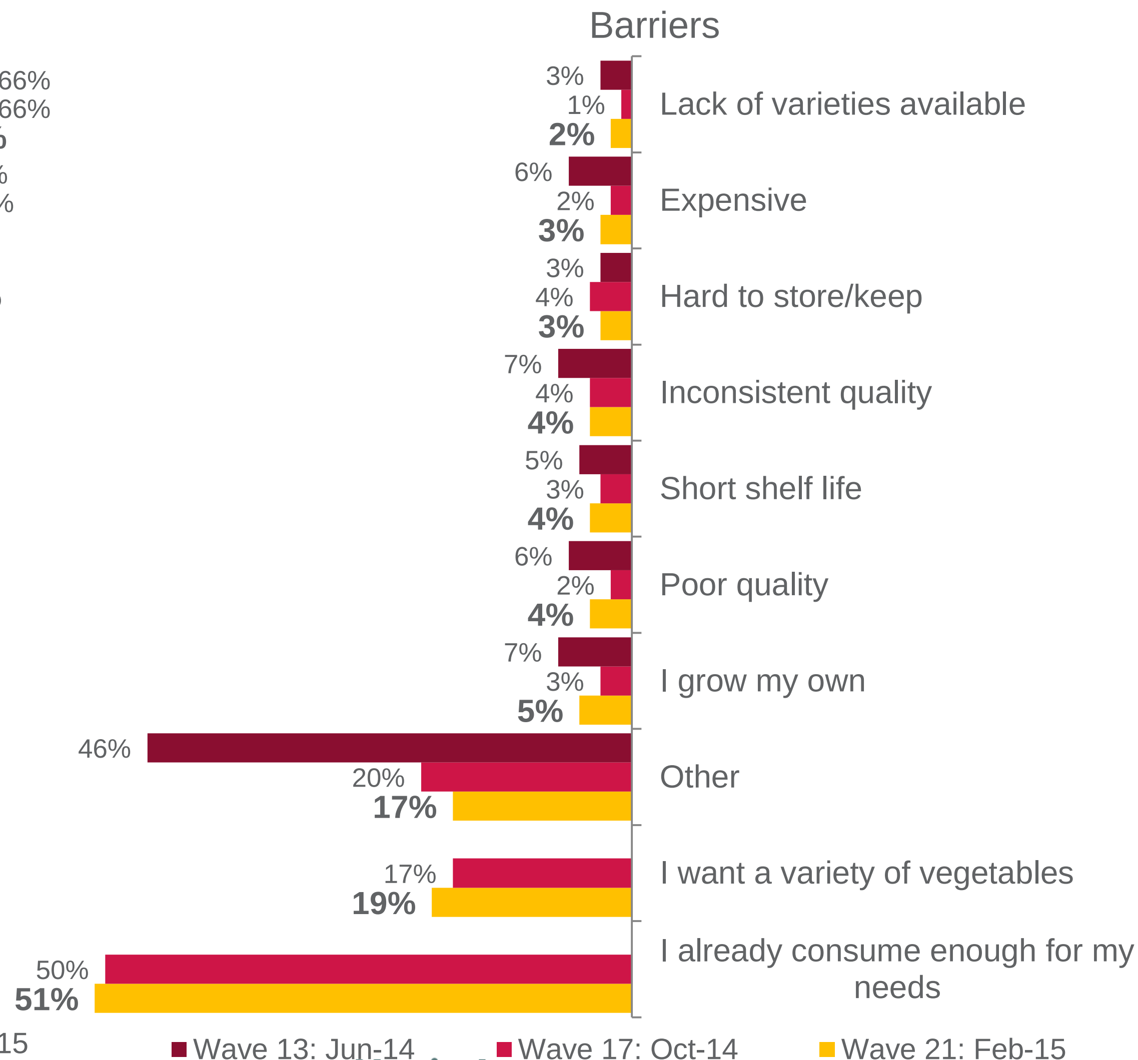
Purple and orange have the highest recall. Awareness of baby carrot types has fallen across the three waves.



Q6a. What varieties/types of carrot are you aware of? (unprompted)
Sample Wave 13 N=314, Wave 17 N=306, Wave 21, N=312

Health and ease of preparation are the main drivers of carrot purchase. Over half of consumers perceive they eat enough for their needs.





Q7. Which of the following reasons best describes why you purchase carrot?
Q8. Which reason best describes why you don't buy carrot more often?
Sample Wave 13 N=314, Wave 17 N=306, Wave 21, N=312

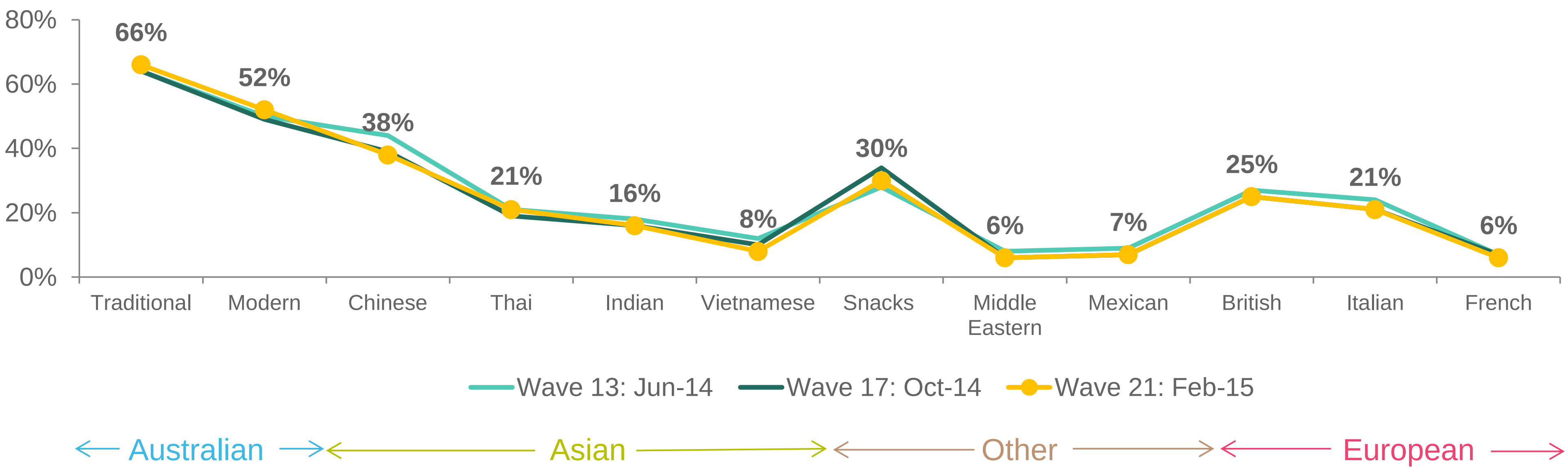
There has been no movement in cuisines over the previous three waves, indicating consumers may lack interest and inspiration for alternative cooking cuisines.

Dinner remains the dominant meal occasion.

Top 5 Consumption Occasions

	Wave 21	Wave 17	Wave 13
Weekday Dinner	69%	61% ▼	62% ▼
Weekend Dinner	46%	42% ▼	46% —
Family meals	43%	38% ▼	46% ▲
Every-day	42%	48% ▲	46% ▲
Quick Meals	36%	24% ▼	30% ▼

Typical Cuisine Cooked



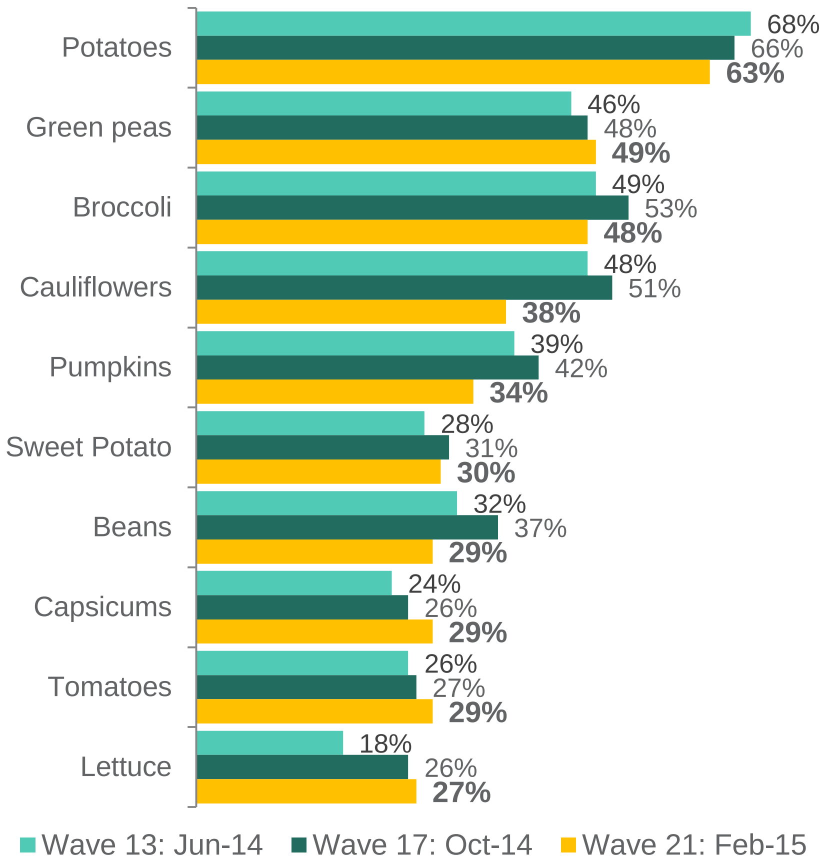
Q10. What cuisines do you cook/consume that use carrot?
Q11. Which of the following occasions do you typically consume/use carrot?
Sample Wave 13 N=314, Wave 17 N=306, Wave 21, N=312

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

Carrots are typically served with potatoes, green peas and broccoli.

Consumers cook carrots in a variety of ways, including stir frying, roasting and raw.

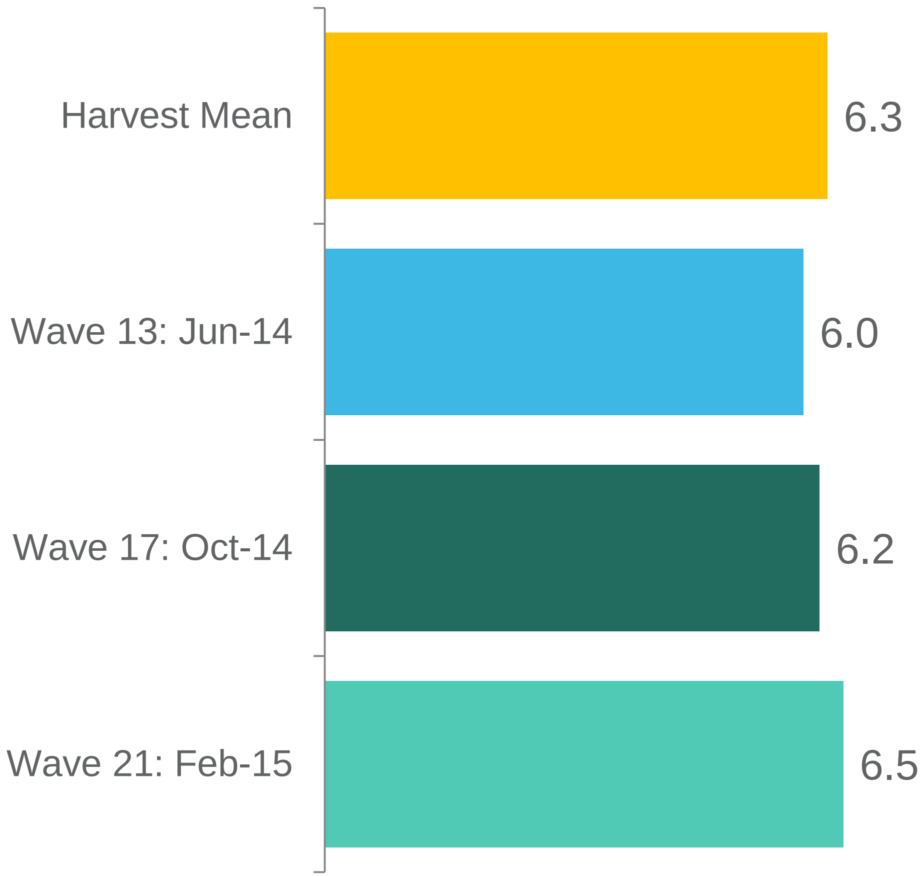
Top Accompanying Vegetables



Top 10 Cooking Styles			
	Wave 13	Wave 17	Wave 21
Stir frying	52%	44%	48%
Roasting	50%	47%	48%
Raw	42%	49%	46%
Boiling	41%	39%	46%
Steaming	51%	51%	46%
Soup	37%	29%	34%
Baking	31%	27%	30%
Stewing	33%	25%	27%
Microwave	27%	23%	25%
Mashing	11%	11%	9%

Q9. How do you typically cook carrot?
Q10a. And when are you serving carrot which of the following do you also serve together with this?
Sample Wave 13 N=314, Wave 17 N=306, Wave 21, N=312

Carrot provenance is becoming increasingly important to consumers, steadily increasing across waves.



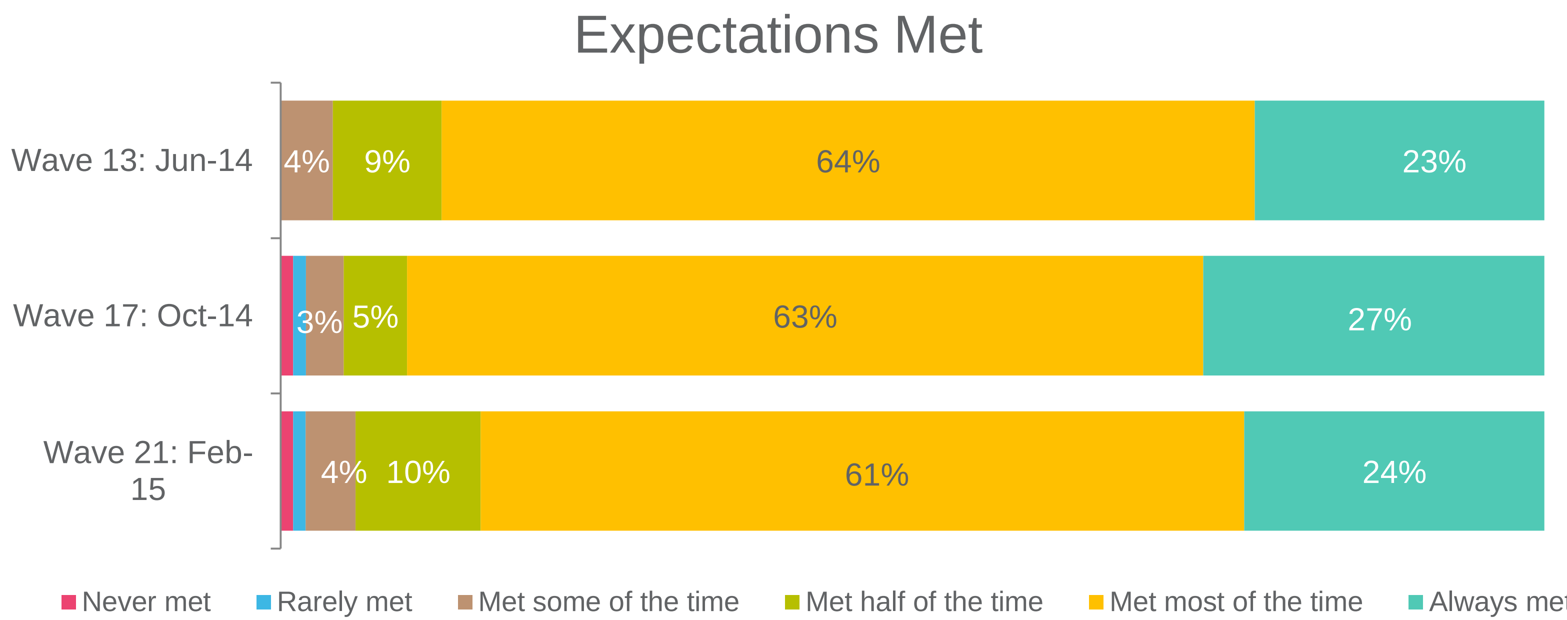
AUSTRALIAN MADE

Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 13 N=314, Wave 17 N=306, Wave 21, N=312

Expectations of freshness are highest when carrots are expected to stay fresh for 12 days, above this, consumers are less likely to be satisfied with carrot freshness.

Expected to stay fresh for **12.4** days

▲ 12.5 days, Wave 13
▼ 12.1 days, Wave 17



Q12. How long do you expect carrots to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy carrots?
Sample Wave 13 N=314, Wave 17 N=306, Wave 21, N=312

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

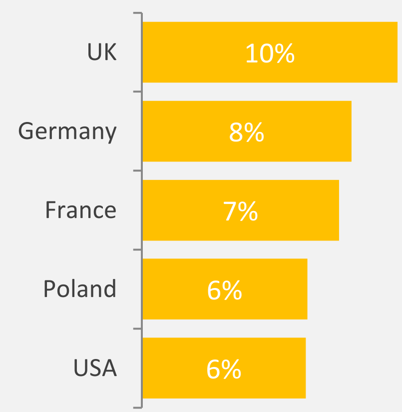
Carrot Product Launch Trends.

Carrot Global NPDs

December 2014 – February 2015

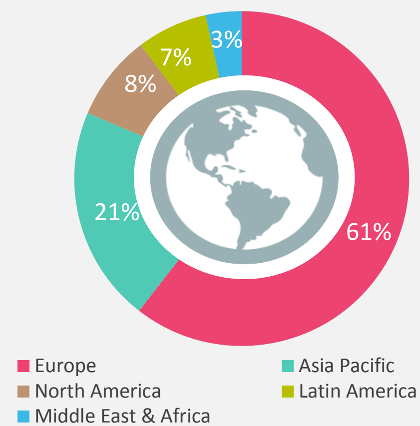
There were 1699 global new products launched over the last 3 months that contained carrot as an ingredient.
The majority of these launches occurred in Europe. Flexible packaging was most common and the key launch category was meals.

Country

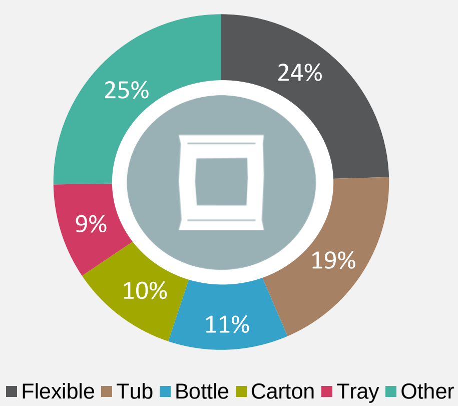


1699 Global NPDs

Region



Top Pack Formats



Categories

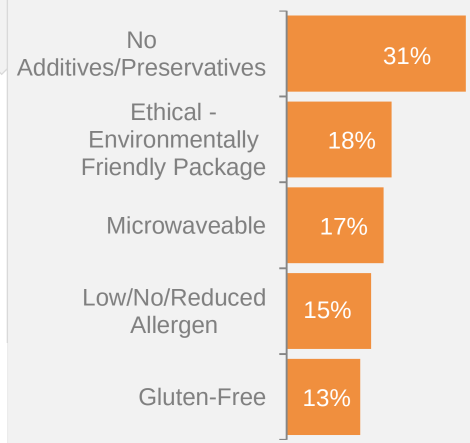
Meals 16%

Sauces 11%

Dairy 9%

Juice Drinks 8%

Top Claims



Carrot Product Launches:
Last 3 Months (December 2014 – February 2015)
Summary

- A total of 1699 products were launched globally in the last 3 months containing carrot as an ingredient, which continues to decline over previous waves.
- There were 31 carrot-containing products launched in Australia in the last quarter. See upcoming pages for examples of Australian launches.
- Europe and the Asia Pacific were the 2 top regions for these product launches (61% and 21% respectively), with Europe growing in launches to represent almost two thirds of all global carrot launches.
- The top pack formats used were flexible formats (24%) and tubs (19%).
- The top categories for product launches were meals (16%), sauces (11%), dairy (9%) and juice drinks (8%).
- The top claims used for launches globally were around health; no additive/ preservatives (31%), ethical - environmentally friendly (18%) and ease - microwavable (17%).
- The most innovative launches found were a baby food starter pack and carrots snack sticks. Examples of these products can be found at the end of the carrot trend report.

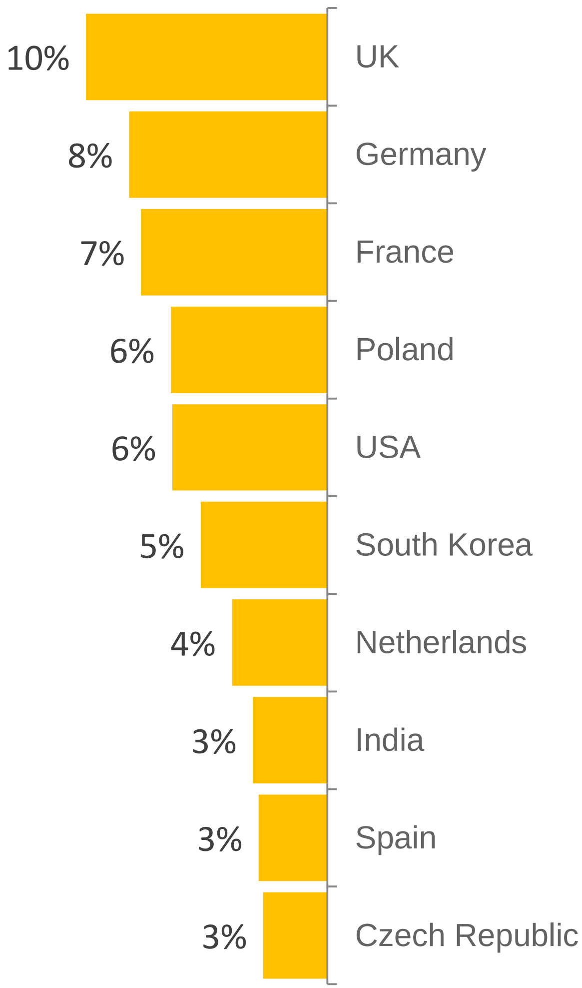
Source: Mintel (2015)

Carrot Launches

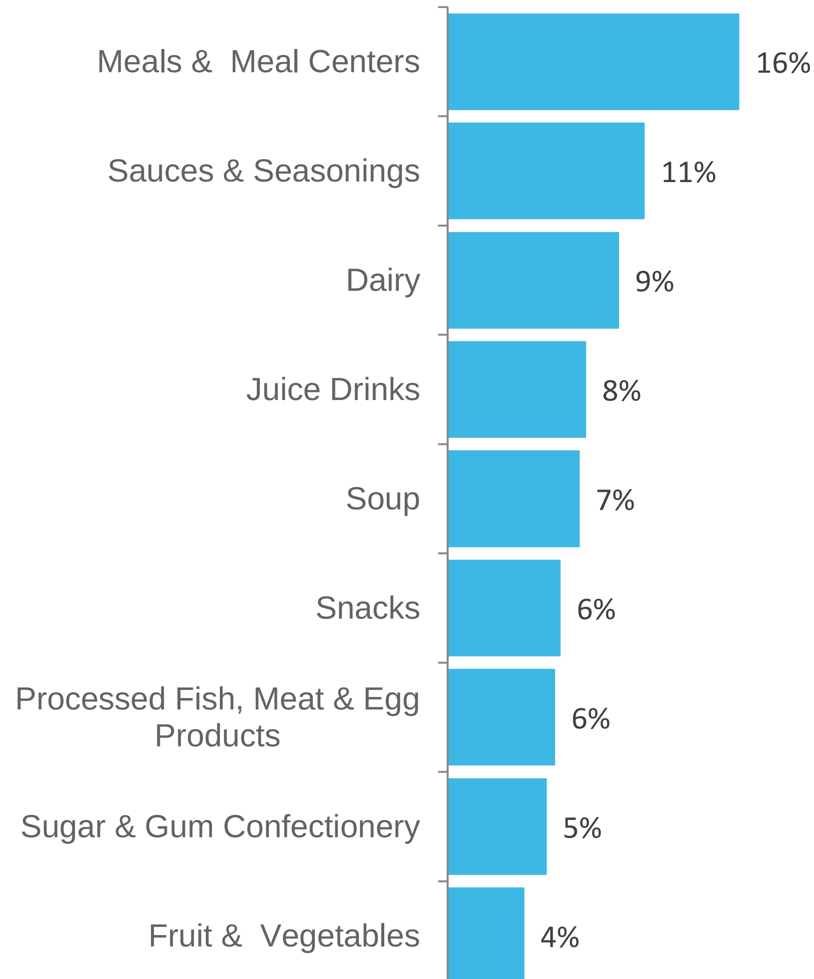
Country, Region & Categories

- The most active countries for launches in the last three months were UK, Germany and France.
- Meals remained the most common category for launches, followed by sauces and dairy.

Top Launch Countries



Top Launch Categories



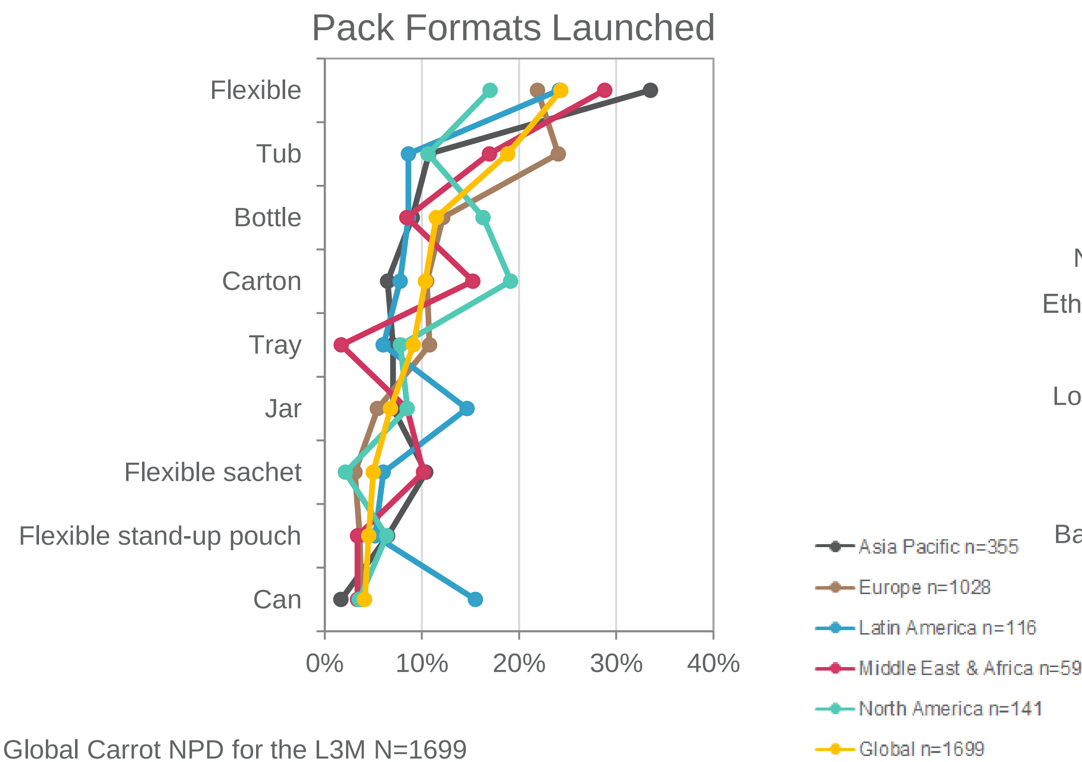
1699 Global Launches

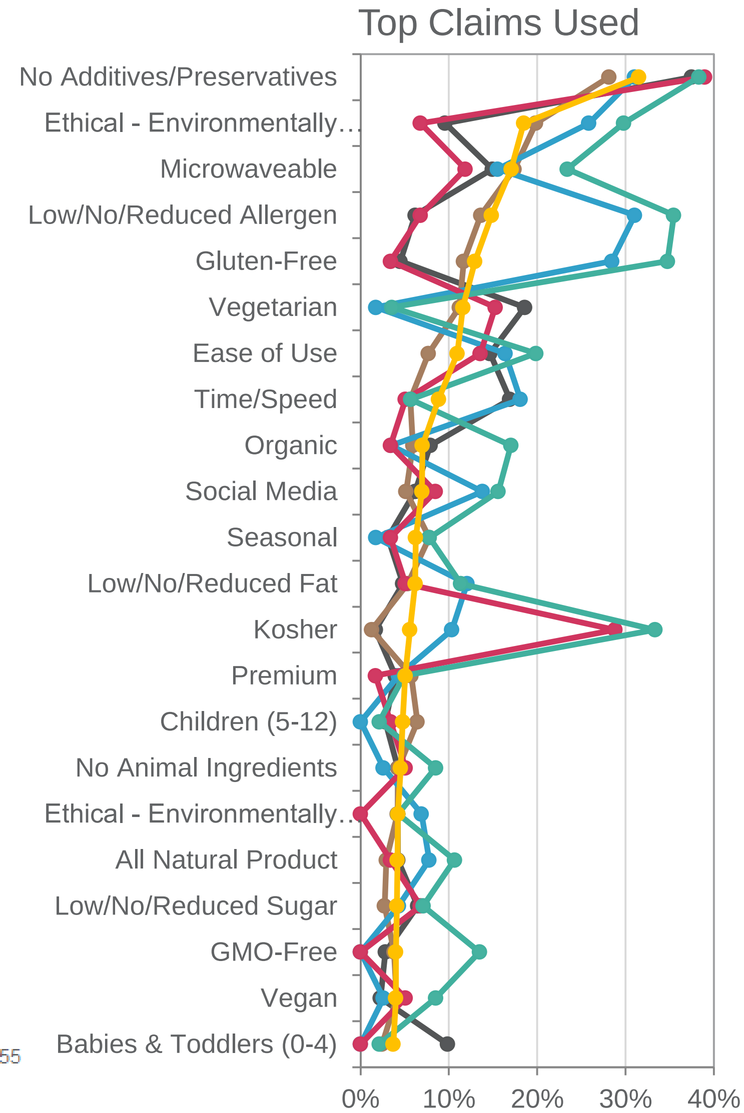
Number of Global Carrot NPD for the L3M N=1699

Carrot Launches

Top Claims & Pack Formats Used

- Flexible packaging and tubs were the most common pack formats.
- The key claim was centred around health, no additive/ preservatives, while ethical – Environmentally friendly and microwavable were also commonly used claims. These claims were consistently more common in North America, along with low allergen and gluten free in both North and Latin America.





Number of Global Carrot NPD for the L3M N=1699

Innovative Carrot Launches:
L3M (December – February 2014/15)

Campbell's Organic Garden Vegetable Soup with Herbs (USA)

Campbell's Organic Garden Vegetable Soup with Herbs is now available. The USDA organic certified product is suitable for vegetarians, microwavable, free from preservatives, and can be just poured, heated and served. The product retails in a 17-oz. recyclable pack.

Claims:
No Additives/Preservatives, Low/No/Reduced Allergen, Gluten-Free, Ethical - Environmentally Friendly Package, Microwaveable, Ease of Use, Organic, Vegetarian

Grünhorst Spicy Vegetable Juice (Germany)

Grünhorst Scharfes Gemüsesaft (Spicy Vegetable Juice) is now available. The product is made from vegetable juices and juice concentrates and is salted and seasoned. It retails in a 500ml pack featuring the FSC Mix logo.

Claims:
Ethical - Environmentally Friendly Package

Ferdig Raw Vegetables with Leeks (Norway)

Ferdig Råkost med Purre (Raw Vegetables with Leeks) is now available. The product comprises a shredded mixture of cabbage, carrot and leek that is said to be great for fish cakes or wok dishes. The product retails in a 250g pack featuring a recipe to prepare a coleslaw.

Claims:
N/A

Country Cakes Carrot Fudge Cake (UK)

Country Cakes Carrot Fudge Cake comprises a delicious moist carrot cake with walnuts topped with a cream cheese flavour fudge and decorated with hazelnuts. The vegetarian product is free from artificial colours and hydrogenated fat, and retails in a 400g pack.

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

Source: Mintel (2014)

Innovative Carrot Launches:
L3M (December – February 2014/15)

AH Snack Today Carrot (Netherlands)

AH Snack Today Wortel (Carrot) comprises sliced carrots. The gluten- and milk-free product retails in a 70g pack.

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

Evolution Fresh Cold-Pressed Carrot Orange Mango Juice (USA)

Evolution Fresh Cold-Pressed Carrot Orange Mango Juice is high pressure processed 100% fruit and vegetable juice blend made with carrot that contains vitamins A and K; orange, which is a source of potassium; and mango that contains vitamin A. This kosher certified product is free from GMO and retails in a 15.2-fl. oz. pack.

Claims:
Organic, Kosher, GMO-Free

So Natural Green Juices Beetroot, Apple, Carrot & Ginger Juice (Spain)

So Natural Green Juices Remolacha, Manzana, Zanahoria y Jengibre (Beetroot, Apple, Carrot & Ginger Juice) has been repackaged and retails in a new 750ml pack. The product is made from fresh fruit and vegetables and contains no colourings or concentrates.

Claims:
NA

Barilla Piccolini Mini Farfalle with Carrots and Pumpkin (Switzerland)

Barilla Piccolini Mini Farfalle con Carote e Zucca (Mini Farfalle with Carrots and Pumpkin) has been repackaged. This product is made with 25% vegetable purée from two carrots and one slice of squash obtained from fresh, in-season vegetables. It contains 100% natural ingredients including durum wheat, vegetable purée and water, and cooks in six minutes. The product is targeted at children and retails in a 400g pack featuring a recipe suggestion on the back.

Claims:
All Natural Product, Children (5-12)

Source: Mintel (2014)

Innovative Carrot Launches:
L3M (December – February 2014/15)

Dizzy Drink! Apple, Carrot, Lime & Strawberry Flavoured Drink (Czech Republic)

Dizzy Drink! Nápoj s Príchutí Jablka, Mrkve, Limetky a Jahody (Apple, Carrot, Lime & Strawberry Flavoured Drink) is made with juices from concentrate, features 20% fruit content and vitamins. This pasteurized product is aimed at children and retails in a 400ml pack, featuring Looney Tunes graphics.

Claims:
Children (5-12)

Cow & Gate Friends Beginner Veggie Baby Food Starter Pack (UK)

Cow & Gate Friends Beginner Veggie Baby Food Starter Pack contains four single veggie pouches of broccoli, carrot, cauliflower and peas. The gluten free product comprises steam-cooked savoury meals featuring single, recognisable vegetable tastes to encourage early acceptance of vegetables. It can be served cold or warm, is suitable for babies from the fourth month and retails in a 4 x 50g pack, bearing Facebook and Blippar logos.

Claims:
Gluten-Free, Social Media, Low/No/Reduced Allergen, Babies & Toddlers (0-4)

Good Natured Selects Garden Herb Flavour Baked Vegetable Crisps (USA)

Good Natured Selects Garden Herb Flavour Baked Vegetable Crisps are free from gluten, trans fat and preservatives, and provide a half serving of vegetables per serving. The kosher certified product contains spinach, carrots and red bell peppers, and retails in a 20-oz. pack.

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

Lotus Pineapple and Carrot Juice Beverage (Puerto Rico)

Lotus Piña Zanahoria Bebida de Jugos de Concentrado (Pineapple and Carrot Juice Beverage) is made from concentrate and contains 30% juice. This pasteurized product provides 100% of the daily recommended amount of vitamin C per serving and retails in a 1.89L bottle bearing the GROW (Global Renewal Opportunity Watch) initiative logo.

Claims:
All Natural Product, Ethical - Environmentally Friendly Product

Source: Mintel (2014)

Top Australian Carrot Launches:
L3M (December – February 2014/15)

Woolworths Created with Jamie Smokin' Sweet Potato & Chorizo Soup

Simmone Logue Fine Food Beef Cocktail Pies

Griff's Sweet & Sour Pork

Salt Meats Cheese Our Nonna's Secret Recipe Chorizo Sauce

Baby-O Organic Apple, Pumpkin, Carrot & Mango Purée

Ho Mai Appetisers Cocktail Spring Rolls

Birds Eye Stir Fry Frozen Supreme Stir Fry Vegetables

Colonial Farm Chickpea Parcels

V8 Tropical Fusion Fruit & Veggie Juice

Woolworths Gold Hand Finished Angus Beef & Brown Ale Mini Pies

Houston's Farm Asian Salad with Crunchy Noodles

Birds Eye Oven Roast Potato, Carrot and Pumpkin with Italian

Source: Mintel (2014)


Cauliflower.

Purchase frequency has remained stable across waves, however consumption has fallen since October 2014.

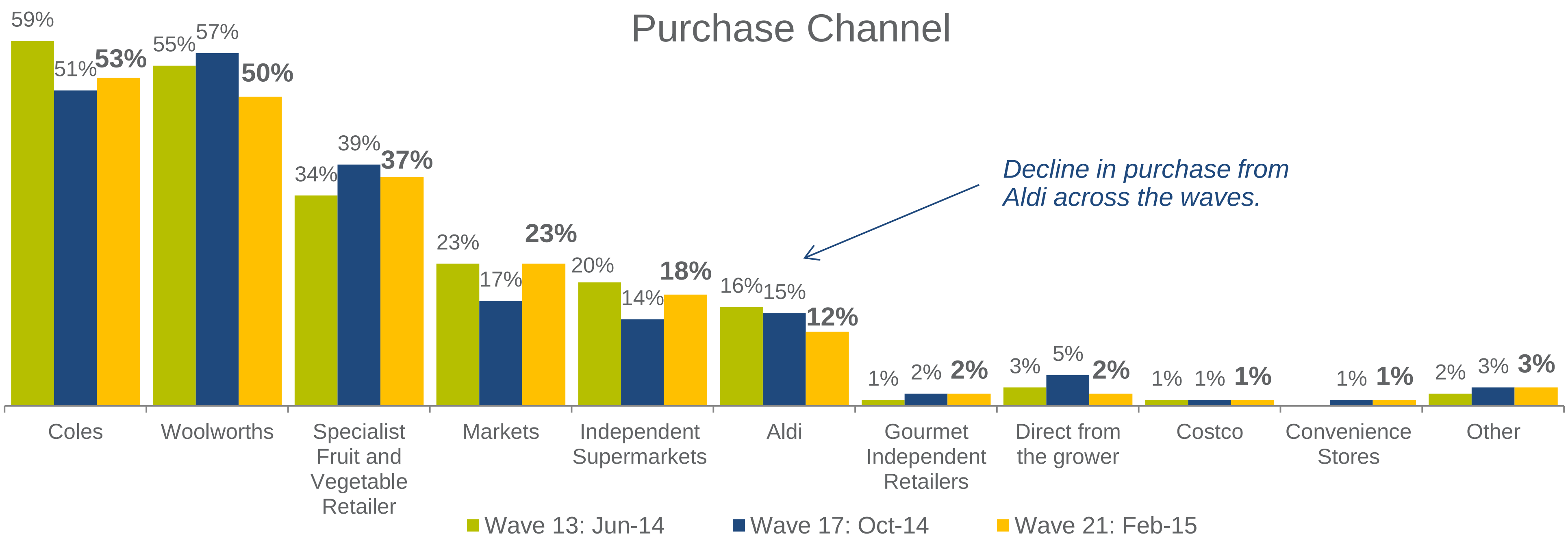
Cauliflower is typically purchased from mainstream retailers, Coles and Woolworths.

Average Purchase **3.2** times per month

▼ 2.9 times, Wave 13
▲ 3.4 times, Wave 17

Average Consumption **7.8** times per month

▼ 7.7 times, Wave 13
▲ 9.0 times, Wave 17



Q1. On average, how often do you purchase cauliflower?
Q2. On average, how often do you consume cauliflower?
Q5. From which of the following channels do you typically purchase cauliflower?
Sample Wave 13 N=309, Wave 17 N=302, Wave 21 N=310

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colmar brunton.

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

Despite a perceived increase in spend and reduced purchase, value for money has remained consistent across waves.

Average weight of purchase

The typical consumer purchases **900g** of cauliflower, somewhat lower than past waves.

▲ 1.0kg, Wave 13

▲ 1.1kg, Wave 17

Recalled last spend

Recalled last spend on cauliflower is **$3.30,** slightly higher than previous months.

▼ $3.10, Wave 13

▼ $3.10, Wave 17

Value for money

Consumers' perceived value for money is fair **(6.1/10).** Value for money is in line with past months.

▼ 5.9/10, Wave 13

— 6.1/10, Wave 17

Q3. How much cauliflower do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? 0-10 scale
Sample Wave 13 N=309, Wave 17 N=302, Wave 21 N=310

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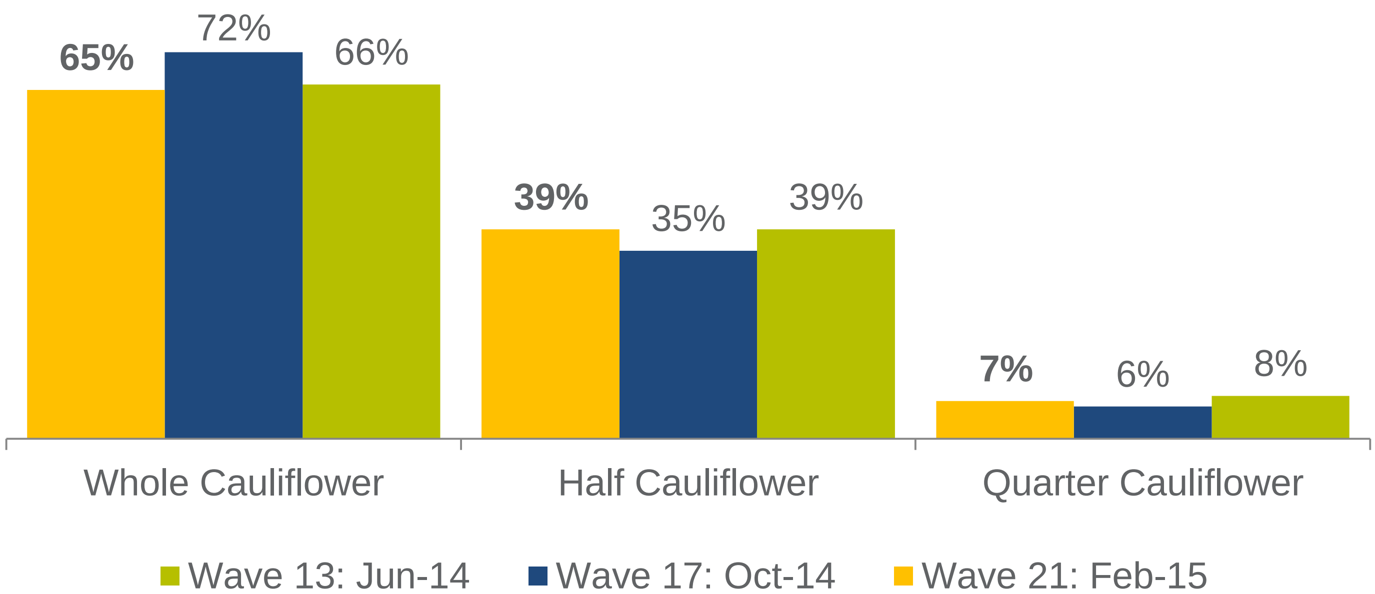
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

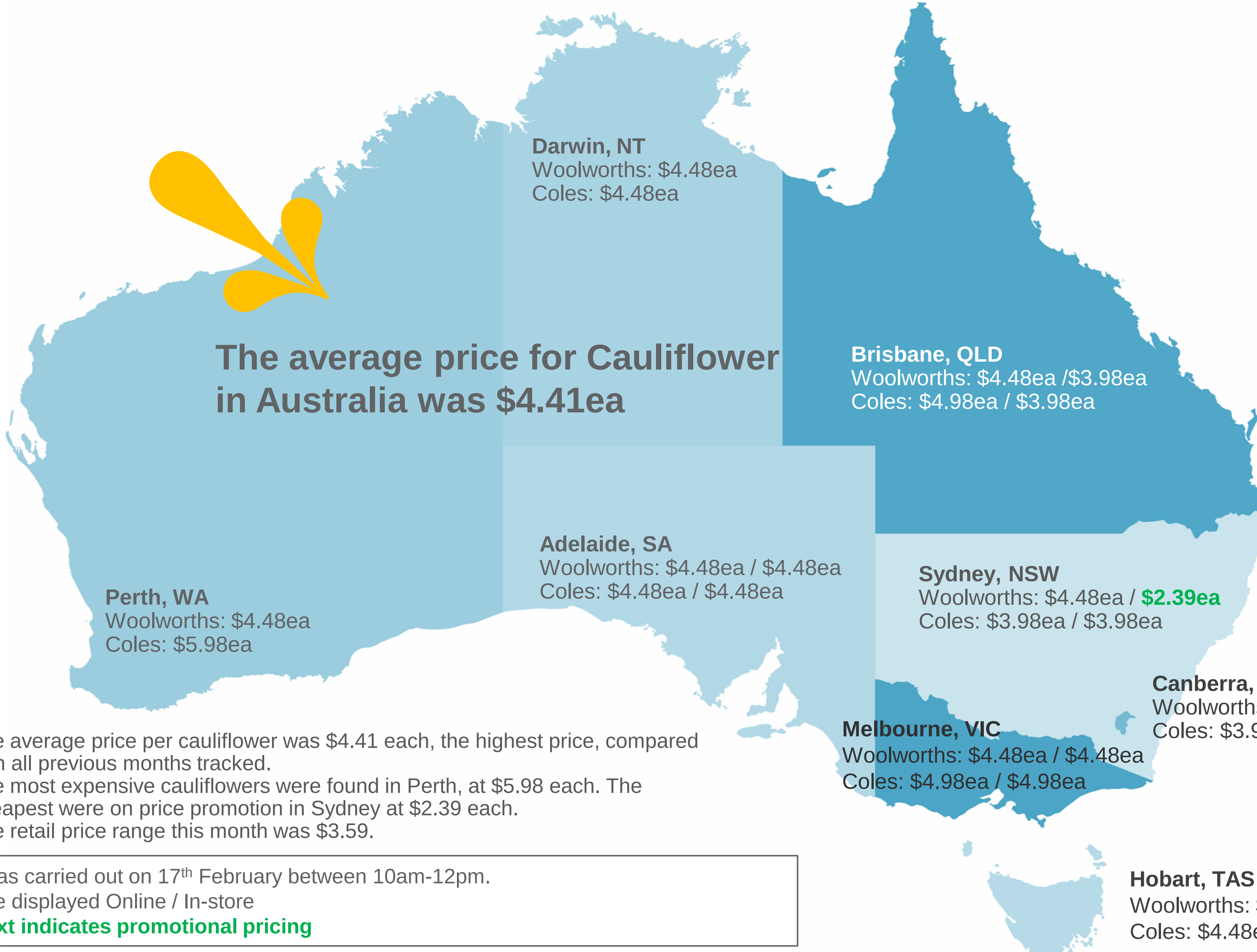
Whole heads of cauliflower continue to be the main format purchased.



Average number purchased	Whole	Half	Quarter
Wave 13: June 2014	1.1	1.1	1.7
Wave 17: October 2014	1.1	1.1	1.6
Wave 21: February 2015	1.1	1.1	2.1

Q3a. How much cauliflower does this typically equate to?
Sample Wave 13 N=309, Wave 17 N=302, Wave 21 N=310

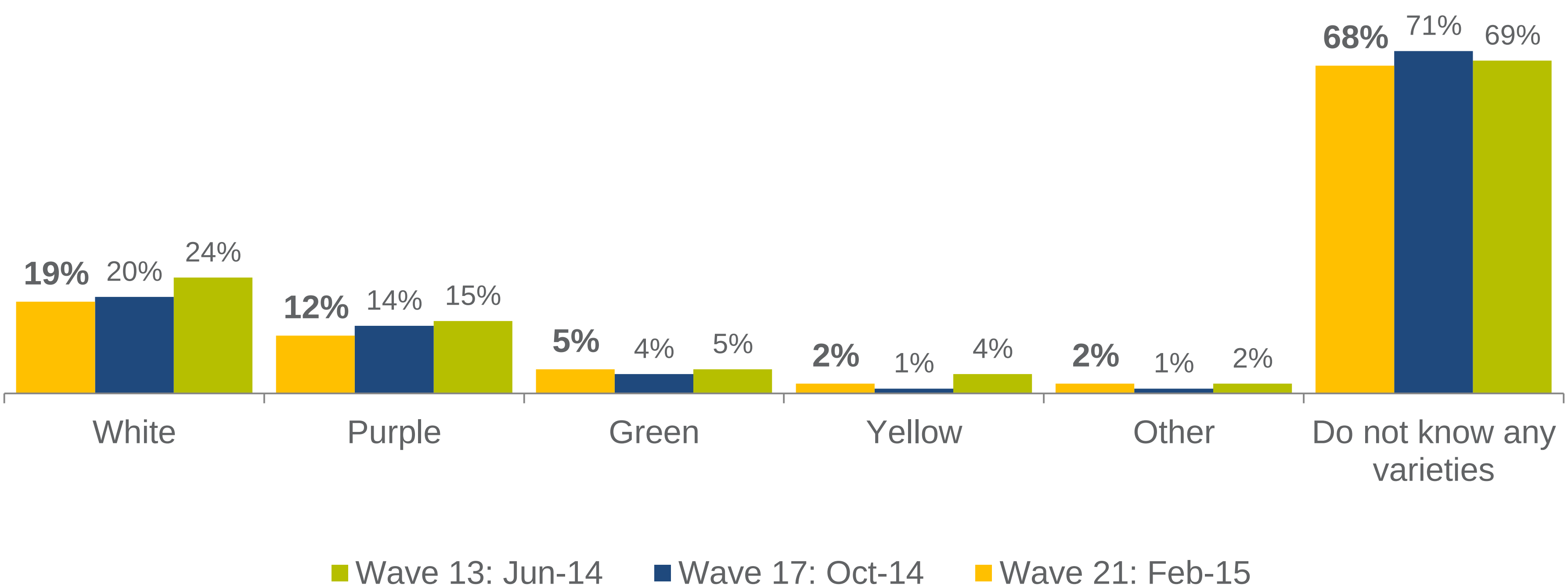
Online and In-store Commodity Prices



- The average price per cauliflower was $4.41 each, the highest price, compared with all previous months tracked.
- The most expensive cauliflowers were found in Perth, at $5.98 each. The cheapest were on price promotion in Sydney at $2.39 each.
- The retail price range this month was $3.59.

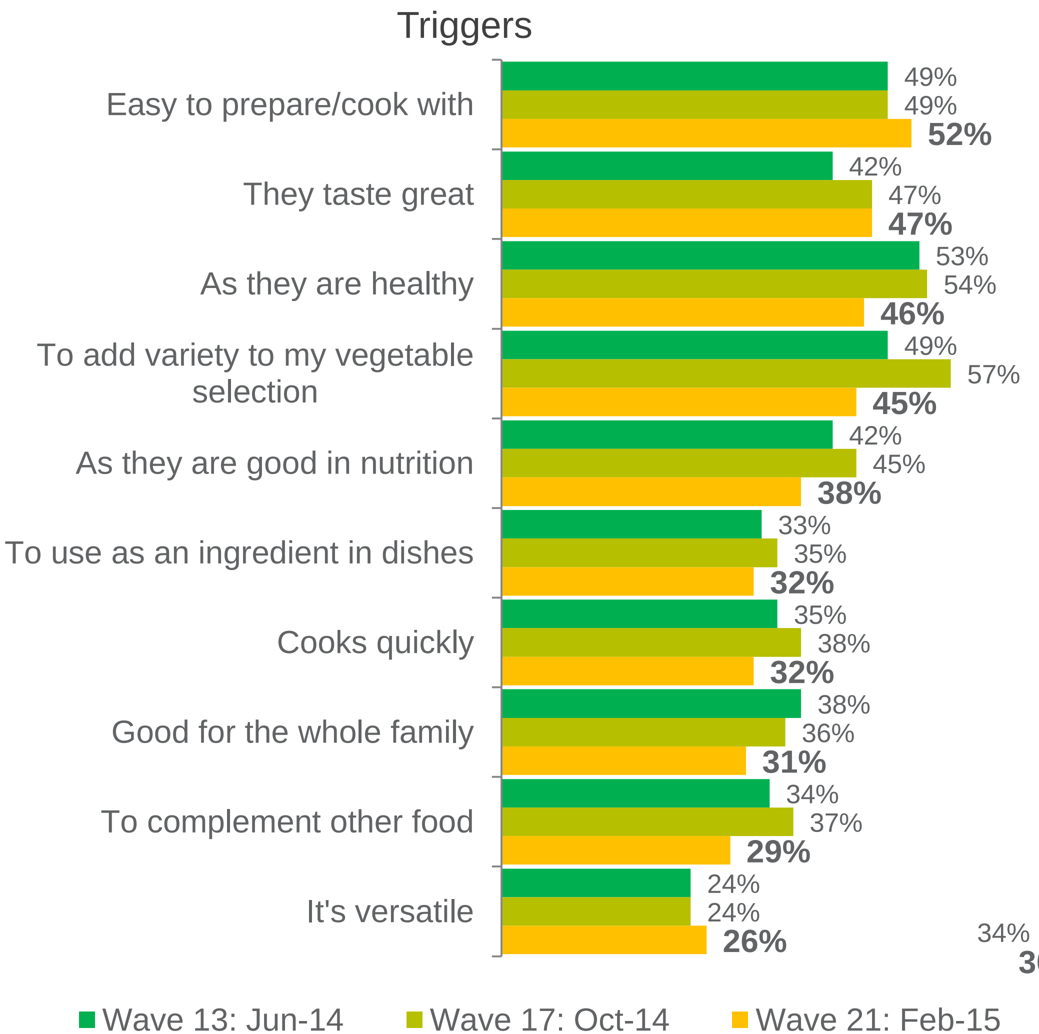
Pricing was carried out on 17th February between 10am-12pm.
Prices are displayed Online / In-store
Green text indicates promotional pricing

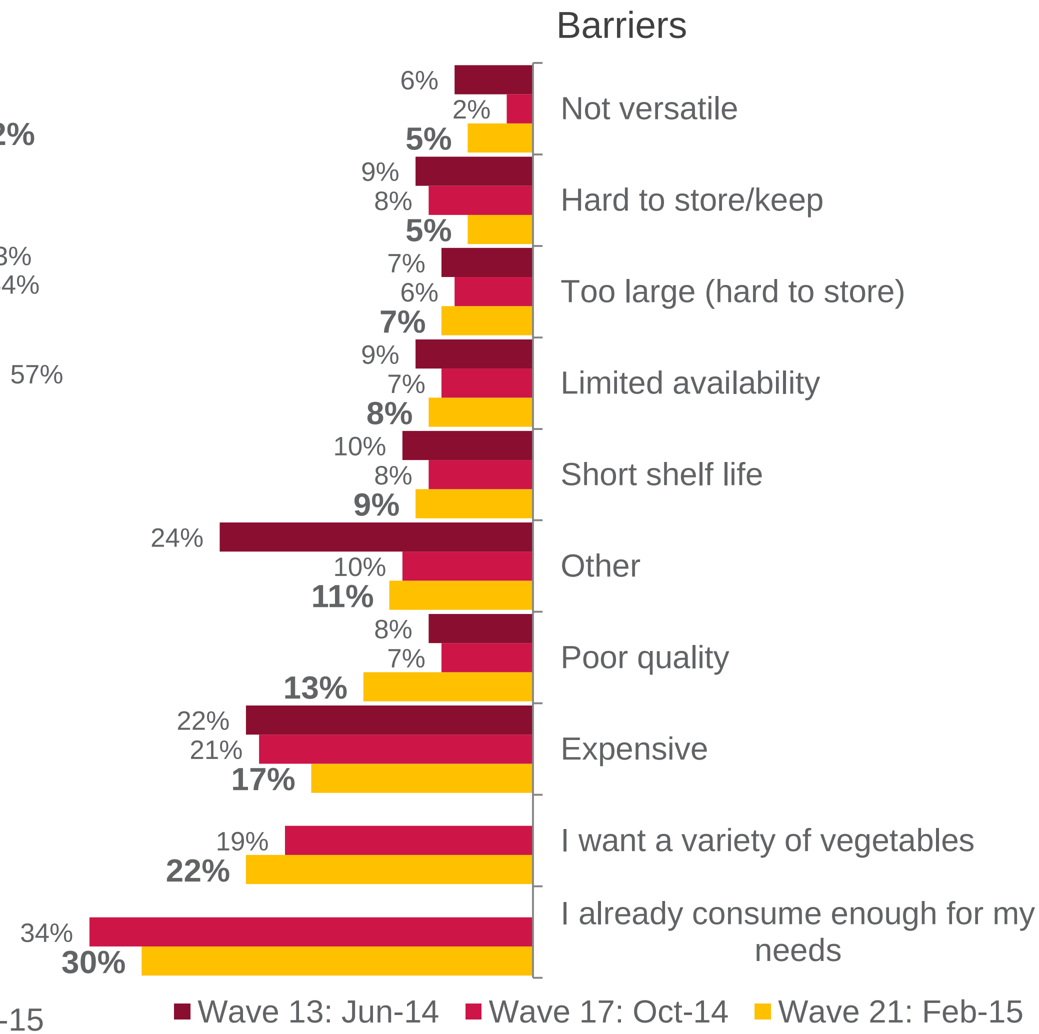
Spontaneous recall remains very low, with a downward trend of white and purple cauliflower awareness.



Q6a. What varieties of cauliflower are you aware of? (unprompted)
Sample Wave 13 N=309, Wave 17 N=302, Wave 21 N=310

Ease of preparation and cooking is the primary influence on purchase. Perception of already eating enough cauliflower is the main barrier to purchase. This wave saw an increase in poor quality.





Q7. Which of the following reasons best describes why you purchase cauliflower?
Q8. Which reason best describes why you don't buy cauliflower more often?
Sample Wave 13 N=309, Wave 17 N=302, Wave 21 N=310

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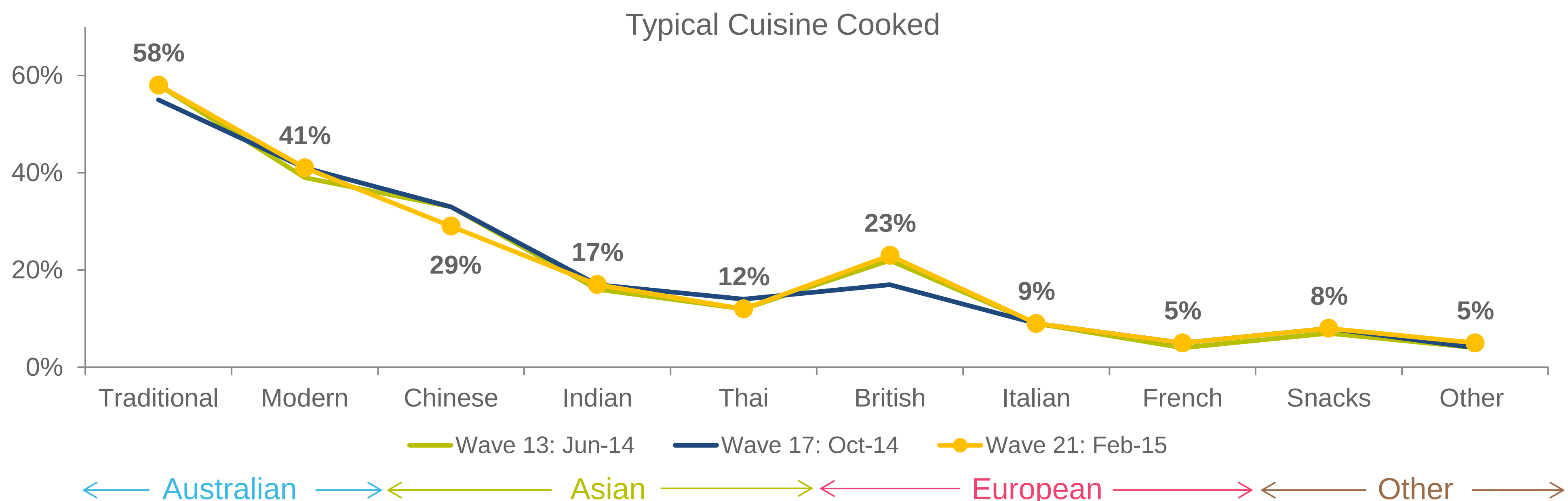
Consumers prefer to use cauliflower in Australian and Asian cuisine.

Weekday dinners are the key meal occasions.

Top 5 Consumption Occasions

	Wave 21	Wave 17	Wave 13
Weekday Dinner	62%	64% ▲	60% ▼
Weekend Dinner	40%	38% ▼	38% ▼
Family meals	35%	37% ▲	39% ▲
Every-day	34%	32% ▼	29% ▼
Quick Meals	18%	17% ▼	18% –

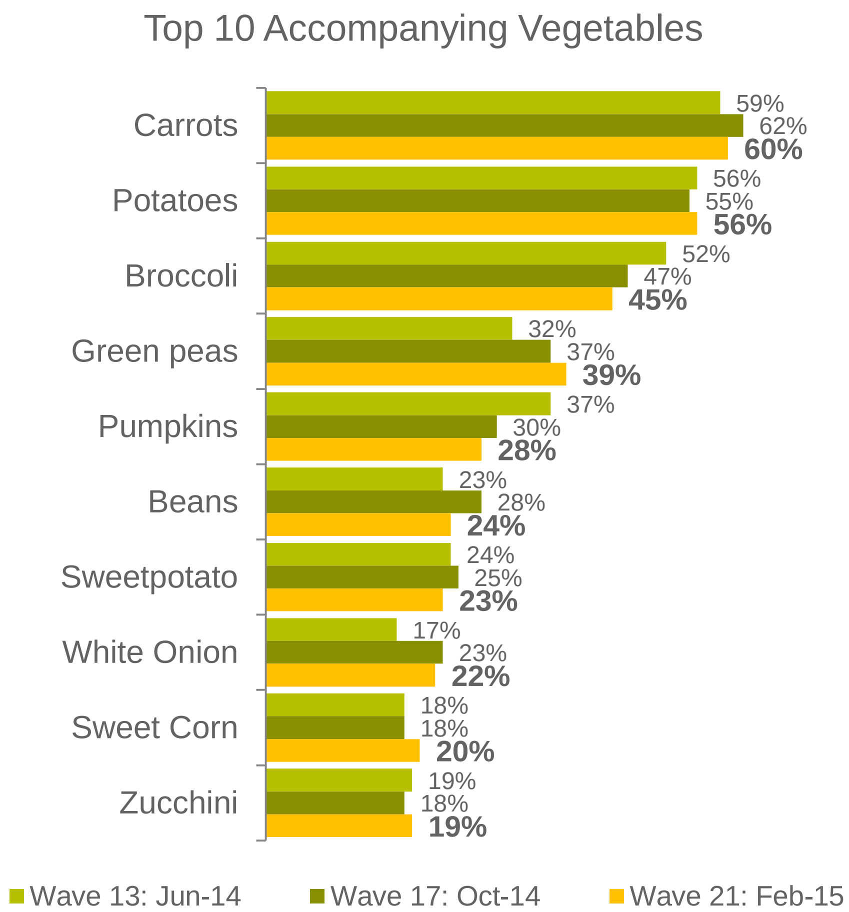


Q10. What cuisines do you cook/consume that use cauliflower?
Q11. Which of the following occasions do you typically consume/use cauliflower?
Sample Wave 13 N=309, Wave 17 N=302, Wave 21 N=310

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

Cauliflower is generally steamed and boiled. The last three waves have seen a steady increase in baking.

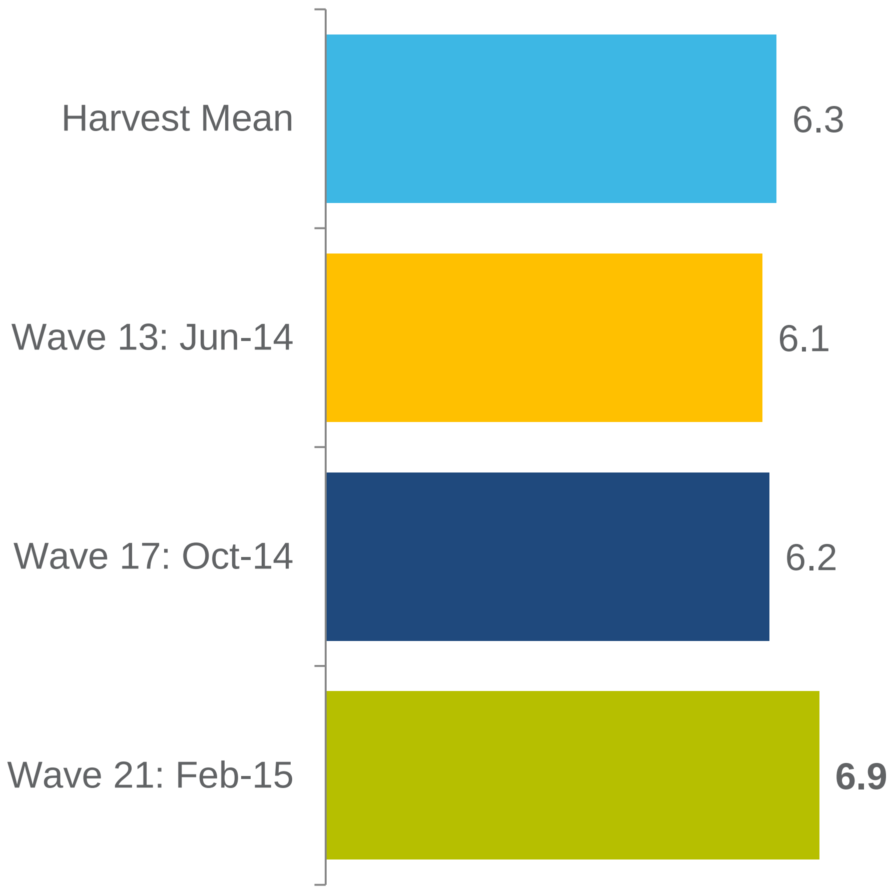
Carrots and potatoes are consistently served with cauliflower.



Top 10 Cooking Styles			
	Wave 13	Wave 17	Wave 21
Steaming	53%	60%	56%
Boiling	40%	36%	41%
Stir frying	36%	36%	38%
Soup	26%	19%	23%
Microwave	20%	23%	21%
Baking	12%	15%	19%
Raw	10%	11%	12%
Stewing	10%	11%	11%
Mashing	5%	7%	8%
Roasting	11%	11%	8%

Q9. How do you typically cook cauliflower?
Q10a. And when are you serving cauliflower which of the following do you also serve together with this?
Sample Wave 13 N=309, Wave 17 N=302, Wave 21 N=310

There has been a substantial increase in the importance of cauliflower provenance, which is likely due to recent media coverage on the topic.



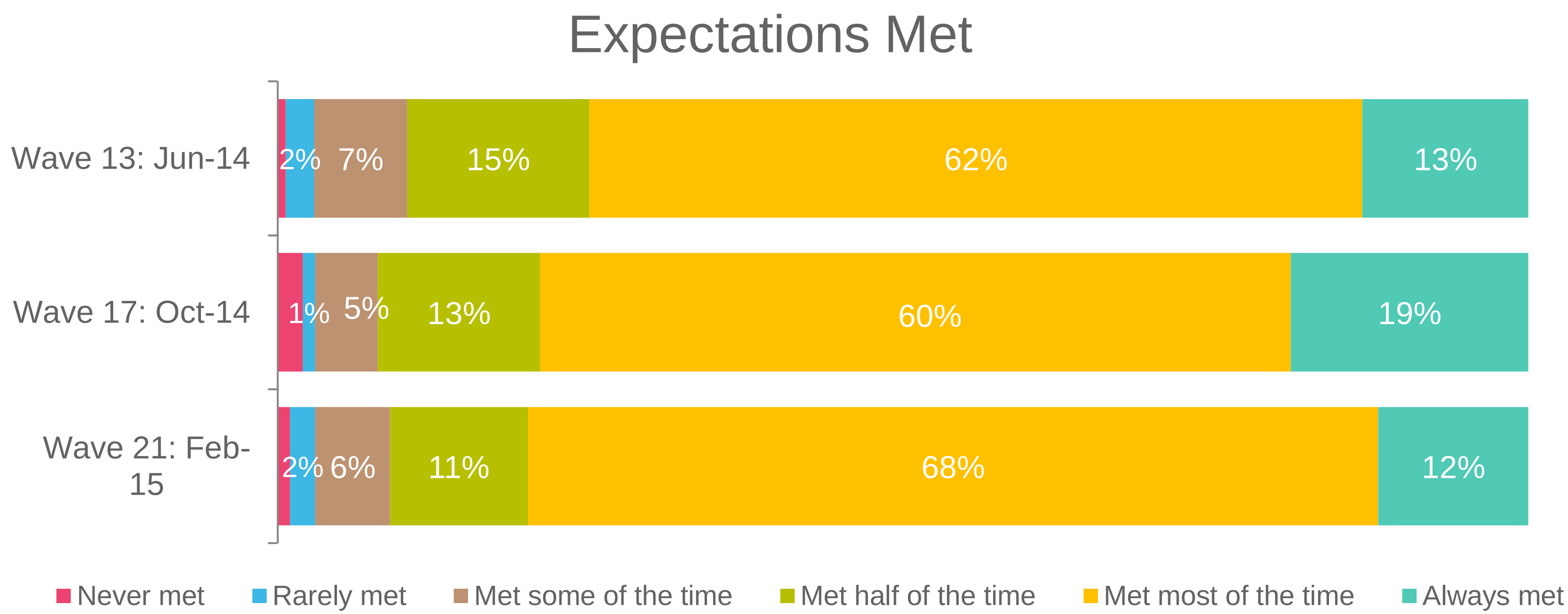
Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 13 N=309, Wave 17 N=302, Wave 21 N=310

Freshness has remained consistent and stable across waves.

Freshness expectations are met most of the time and are at their highest levels across waves.

Expected to stay fresh for **8.6** days

▲ 8.9 days, Wave 13
▲ 8.8 days, Wave 13



Q12. How long do you expect cauliflower to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy cauliflower?
Sample Wave 13 N=309, Wave 17 N=302, Wave 21 N=310

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

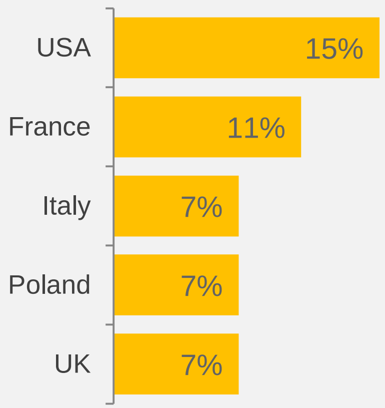
Cauliflower Product Launch Trends.

Cauliflower Global NPDs

December 2014 – February 2015

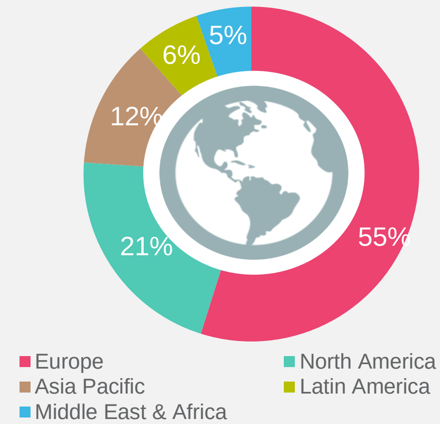
There were 113 products launched in the past three months that contained cauliflower. Europe and Asia Pacific were the main regions for launches, with USA and France the key countries. Flexible packaging remained the most common format. Launches were predominately in fruit and vegetable, sauces and meals categories.

Country

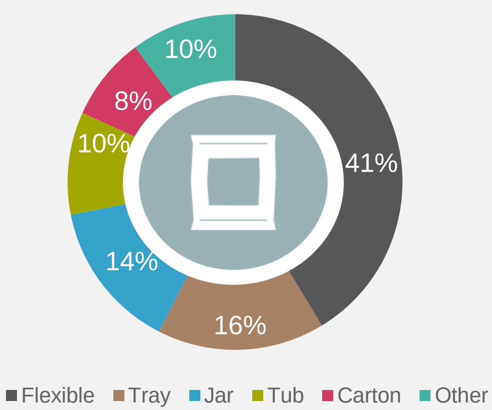


113 Global NPDs

Region



Top Pack Formats



Categories

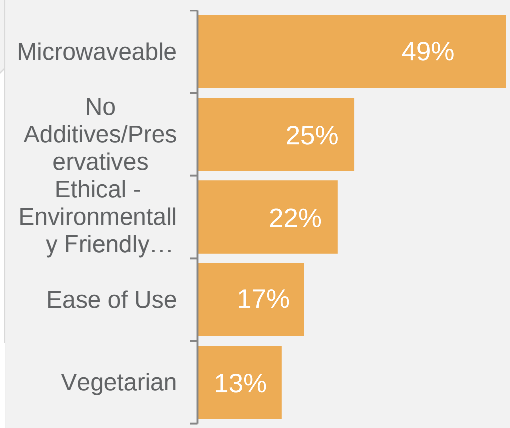
Fruit & Vegetables 38%

Meals & Meal Centres 20%

Sauces & Seasonings 12%

Soup 10%

Top Claims



Cauliflower Product Launches:
Last 3 Months (December 2014 – February 2015)
Summary

- There were 113 products launched over the past 3 months that contained cauliflower as an ingredient. This was an increase from the previous wave (N=103)
- There were three cauliflower products launched in Australia in the past three months.
- More than half of the products were launched in Europe (55%), with USA and France the key launch countries.
- Flexible (41%), tray (16%) and jar (14%) packaging were the top 3 pack formats.
- The top categories for launches were fruit and vegetables (38%), meals and meal centres (20%) and sauces and seasonings (12%).
- Convenience and health claims were typically used on products, including microwaveable (49%) and “no-added” (25%), environmentally friendly packaging (22%). These have been consistent with all previous waves tracked for cauliflower products.
- Due to cooler months in the northern hemisphere there were a lot of soup and curry launches (see following pages for examples of product launches).

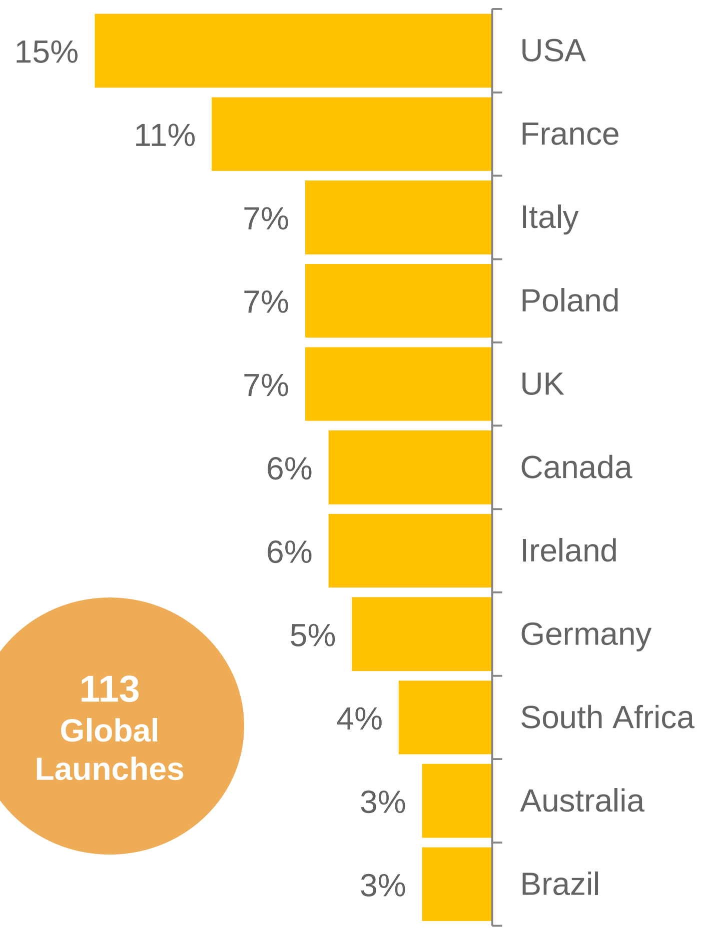
Source: Mintel (2015)

Cauliflower Launches

Country, Region & Categories

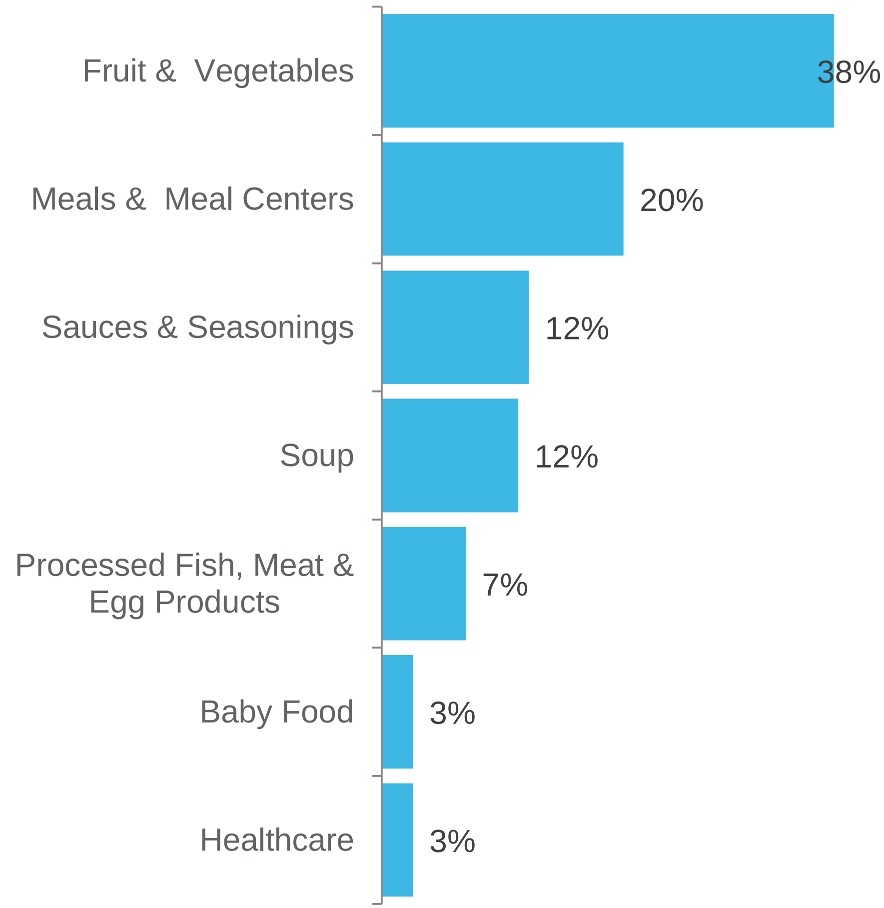
- The key three countries for cauliflower launches and innovation were[80] USA, France and Italy.
- Products containing cauliflower were launched across multiple categories including fruit and vegetables, sauces and meals.

Top Launch Countries



113 Global Launches

Top Launch Categories



Number of Global Cauliflower NPDs for the L3M N=113

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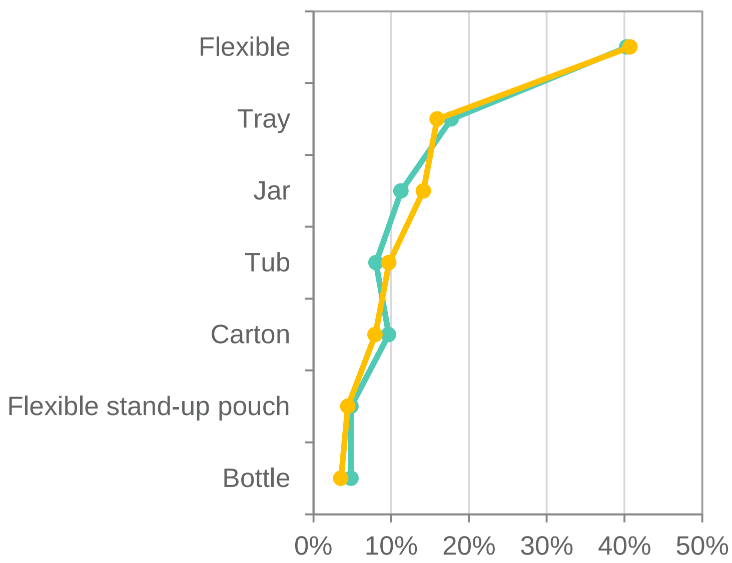
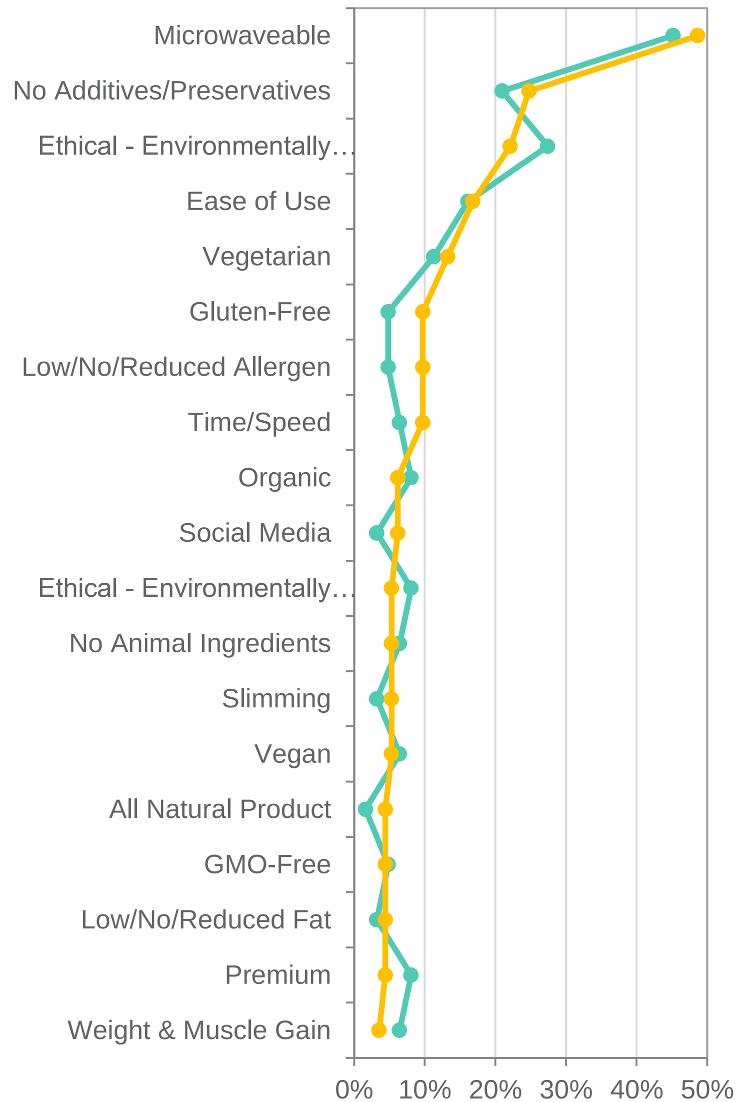
Cauliflower Launches
Top Claims & Pack Formats Used

- Flexible packaging was the predominant format type for products launched in the last three months. Cartons, trays and jars were also common formats.
- Convenience and health claims were most popular over the last three months. Ethical – Environmentally friendly was more popular in Europe.

Pack Formats Launched



Top Claims Used



Europe n=62 Global N=113

Number of Global Cauliflower NPDs for the L3M N=113
Only shown for Global and Europe as sample (other regions sample size for launches were N<30)

Innovative Cauliflower Launches:
L3M (December – February 2014/15)

Wegmans Food You Feel Good About Just Picked and Quickly Frozen Harvest Blend (USA)

Wegmans Food You Feel Good About Just Picked and Quickly Frozen Harvest Blend comprises broccoli, cauliflower, carrots, zucchini and yellow squash without artificial colors, flavors, or preservatives. The kosher certified product is microwavable, and retails in a 16-oz. pack featuring a heart healthy logo.

Claims:
Low/No/Reduced Lactose, No Additives/Preservatives, Low/No/Reduced Allergen, Organic, Vegan, Kosher, Microwaveable, Ease of Use, Gluten-Free, No Animal Ingredients

Woolworths Food Vegetarian Cauliflower Malabaar Curry (South Africa)

Woolworths Food Vegetarian Cauliflower Malabaar Curry is now available. The microwavable product consists of roasted cauliflower and butternut in a creamy coconut curry sauce served with a fragrant lentil rice. Suitable for vegetarians with milk, the product retails in a 350g recyclable pack.

Claims:
Vegetarian, Ethical - Environmentally Friendly Package, Microwaveable

Marks & Spencer Vegetable Bake (France)

Marks & Spencer Carottes, Fleurettes de Chou-Fleur et Haricots Verts dans une Sauce Blanche Recouverts de Pomme de Terre (Vegetable Bake) cooks in 25 minutes and comprises carrots, cauliflower, green beans and crispy potato. This microwaveable product is suitable for vegetarians, and retails in a 300g pack.

Claims:
Vegetarian, Ethical - Environmentally Friendly Package

Lidl Dutch Cauliflower Soup (Netherlands)

Lidl Hollandse Bloemkoolsoep (Dutch Cauliflower Soup) is now available. The microwaveable product comes with bacon bits and is delicious with bread and herb butter. It retails in a 570ml pack featuring the Beter Leven Dierenbescherming logo, indicating the animals are treated well.

Claims:
Ethical - Animal, Microwaveable

Source: Mintel (2015)

Innovative Cauliflower Launches:
L3M (December – February 2014/15)

Season's Choice with Sauce Steam Cheesy California Blend (USA)

Season's Choice with Sauce Steam Cheesy California Blend consists of broccoli, carrots, cauliflower and cheese sauce. The vegetables are said to be from field to frozen for locked-in freshness and can cook in the bag with easy-steaming technology. They can be microwaved in as little as four minutes with minimal clean-up.

Claims:
Low/No/Reduced Lactose, No Additives/Preservatives, Low/No/Reduced Allergen, Low/No/Reduced Fat, Time/Speed, Microwaveable, Ease of Use, Gluten-Free

Tesco Finest Cauliflower Cheese (UK)

Tesco Finest Cauliflower Cheese has been repackaged with a new look. This microwaveable product contains cauliflower florets in a velvety sauce made with cream and tangy 24 month matured Barber's West Country farmhouse cheddar and a herb crumb topping. It is suitable for vegetarians and retails in a recyclable 350g pack.

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Claims:
Cobranded, Ethical - Environmentally Friendly Package, Vegetarian, Premium, Microwaveable

Asack Pickle From Nature Cauliflower Pickle (South Korea)

Asack Pickle From Nature Cauliflower Pickle is made with 62% cauliflowers that were grown in a vegetable garden and pickled with naturally fermented persimmon vinegar. This crispy and sour product retails in a 300g jar.

Claims:
NA

Shanik Sweet Potato & Cauliflower Curry (USA)

Shanik Sweet Potato & Cauliflower Curry is balanced and mellow with roasted Indian spices of cilantro, cumin, and fennel that creates a unique flavor profile. The recipe is said to use the freshest, most fragrant, and locally source ingredients. The vegetarian product contains only non-GMO ingredients and retails in a 24-oz. pack.

Claims:
Vegetarian, Vegan, No Animal Ingredients, Ethical - Environmentally Friendly Product, GMO-Free

Source: Mintel (2015)

Innovative Cauliflower Launches:
L3M (December – February 2014/15)

Farley's Heinz Dinners Multigrain with Cauliflower Broccoli & Cheese (Vietnam)

Heinz Multigrain with Cauliflower Broccoli & Cheese have been relaunched with a new formulation and now retails in a newly designed 125g recyclable pack. The vegetarian product contains all the good stuff such as iron to support healthy cognitive development; calcium and vitamin D to support healthy bone development; and 12 key vitamins and mineral; and provides two teaspoons of vegetables per serving.

Claims:
No Additives/Preservatives, Vitamin/Mineral Fortified, Low/No/Reduced Allergen, Brain & Nervous System (Functional), Other (Functional), Ethical - Environmentally Friendly Package, Ease of Use, Gluten-Free, Vegetarian, Babies & Toddlers (0-4), Bone Health

Auchan "Les Recettes du Traiteur..." Cauliflower Gratin (France)

Auchan "Les Recettes du Traiteur..." Gratin de Choux-Fleurs (Cauliflower Gratin) has been relaunched in a newly designed pack and with a new brand name. This microwaveable product comprises cauliflower, bechamel sauce and emmental, and is free from preservatives, flavour enhancers, colourings, palm oil, hydrogenated oils and artificial flavourings. It retails in a 300g partly recyclable pack that serves one.

Claims:
No Additives/Preservatives, Low/No/Reduced Transfat, Ethical - Environmentally Friendly Package, Microwaveable

Canyon Creek Food Company Cauliflower Three Cheese Soup (Canada)

Canyon Creek Food Company Cauliflower Three Cheese Soup is creamy cauliflower soup made with asiago, white cheddar and parmesan cheeses. The ready-to-serve soup can be heated in the microwave; and is free from gluten, artificial colours, and flavours. The kettle-cooked product retails in a 2 x 625ml pack.

Claims:
Ease of Use, No Additives/Preservatives, Low/No/Reduced Allergen, Gluten-Free, Microwaveable

Avoca To Go Cauliflower, Gruyere & Cheddar Soup (Ireland)

Avoca To Go Cauliflower, Gruyere & Cheddar Soup is now available. The product retails in a 580g pack.

Claims:
On-the-Go

Source: Mintel (2015)

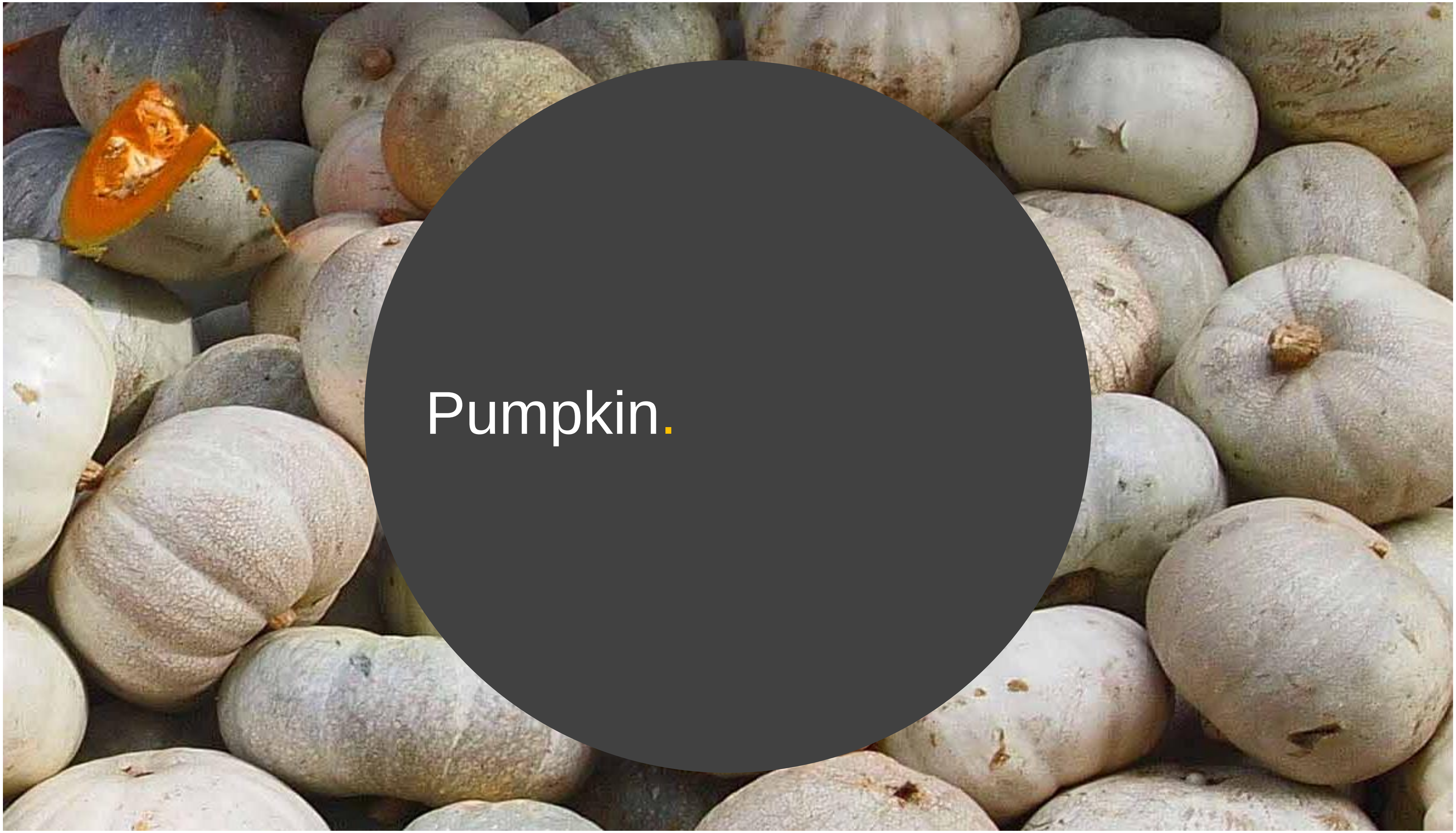
Top Australian Cauliflower Launches:
L3M (December to February 2014/15)

Woolworths Created with Jamie Cheeky Cauliflower Cheese Soup

Birds Eye Stir Fry Frozen Supreme Stir Fry Vegetables

Colonial Farm Vegetable Patties with Quinoa

Source: Mintel (2015)



Pumpkin.

Consumption is slightly lower this month, however purchase frequency has remained stable, typically three times per month.

Pumpkin is generally purchased from mainstream retailers.

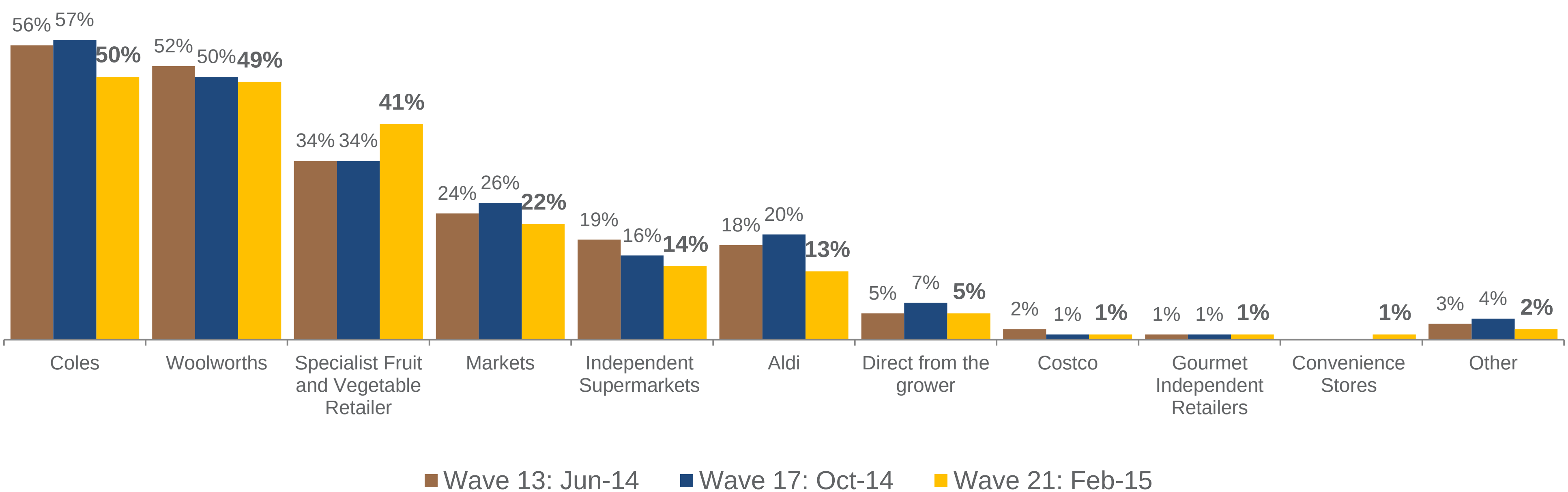
Average Purchase **3.0** times per month

▲ 2.9 times, Wave 13
▼ 3.1 times, Wave 17

Average Consumption **8.3** times per month

▼ 8.4 times, Wave 13
▼ 9.1 times, Wave 17

Purchase Channels



Q1. On average, how often do you purchase pumpkin?
Q2. On average, how often do you consume pumpkin?
Q5. From which of the following channels do you typically purchase pumpkin?
Sample Wave 13 N=309 Wave 17 N=302, Wave 21 N=311

Horticulture Innovation Australia

colmar brunton.

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

Purchase and spend are largely unaffected by seasonality, consistent across waves.

Average weight of purchase

The average consumer typically purchases **1.3kg** of pumpkin, in line with previous waves.

▲ 1.4kg, Wave 9

▲ 1.4kg, Wave 13

Recalled last spend

Recalled last spend on pumpkin is **$3.30**, consistent across past months.

▼ $3.10, Wave 13

— $3.30, Wave 17

Value for money

Consumers' perceived value for money is relatively good **(6.8/10)**, which has remained strong since October 2014.

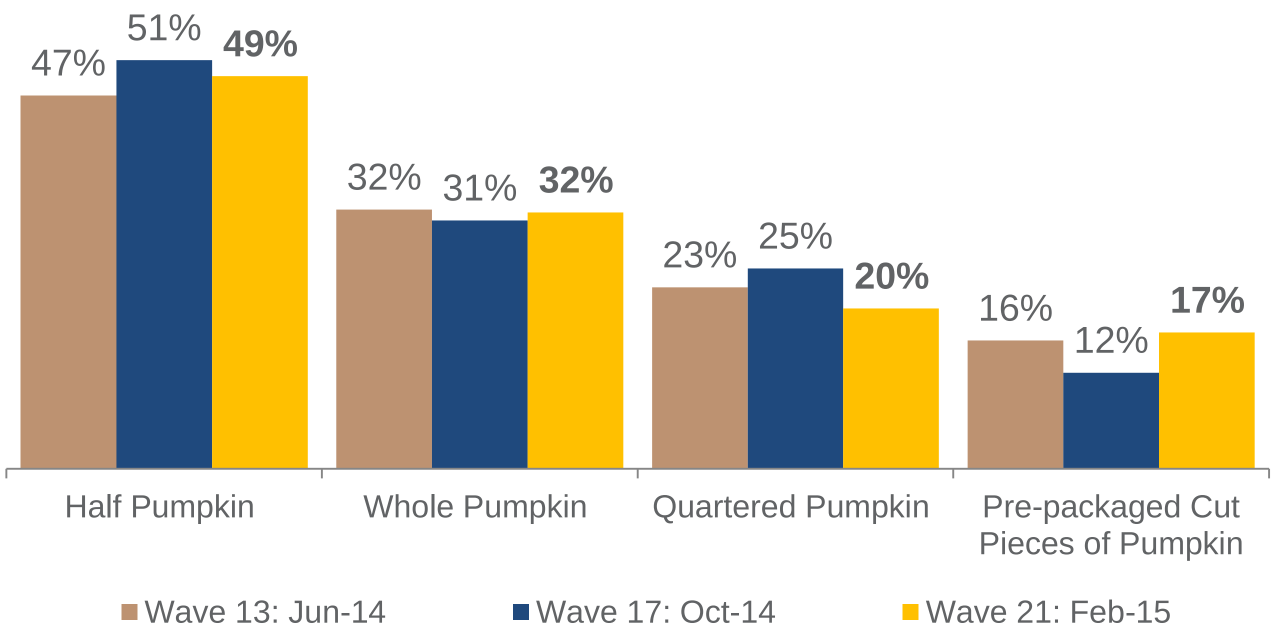
▼ 6.5/10, Wave 13

— 6.8/10, Wave 17

Q3. How much pumpkin do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 13 N=309 Wave 17 N=302, Wave 21 N=311

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

Half formats remain the most commonly purchased. Pre-packed cut pumpkin has increased in popularity from October, which may be due to greater availability and change in seasonality.

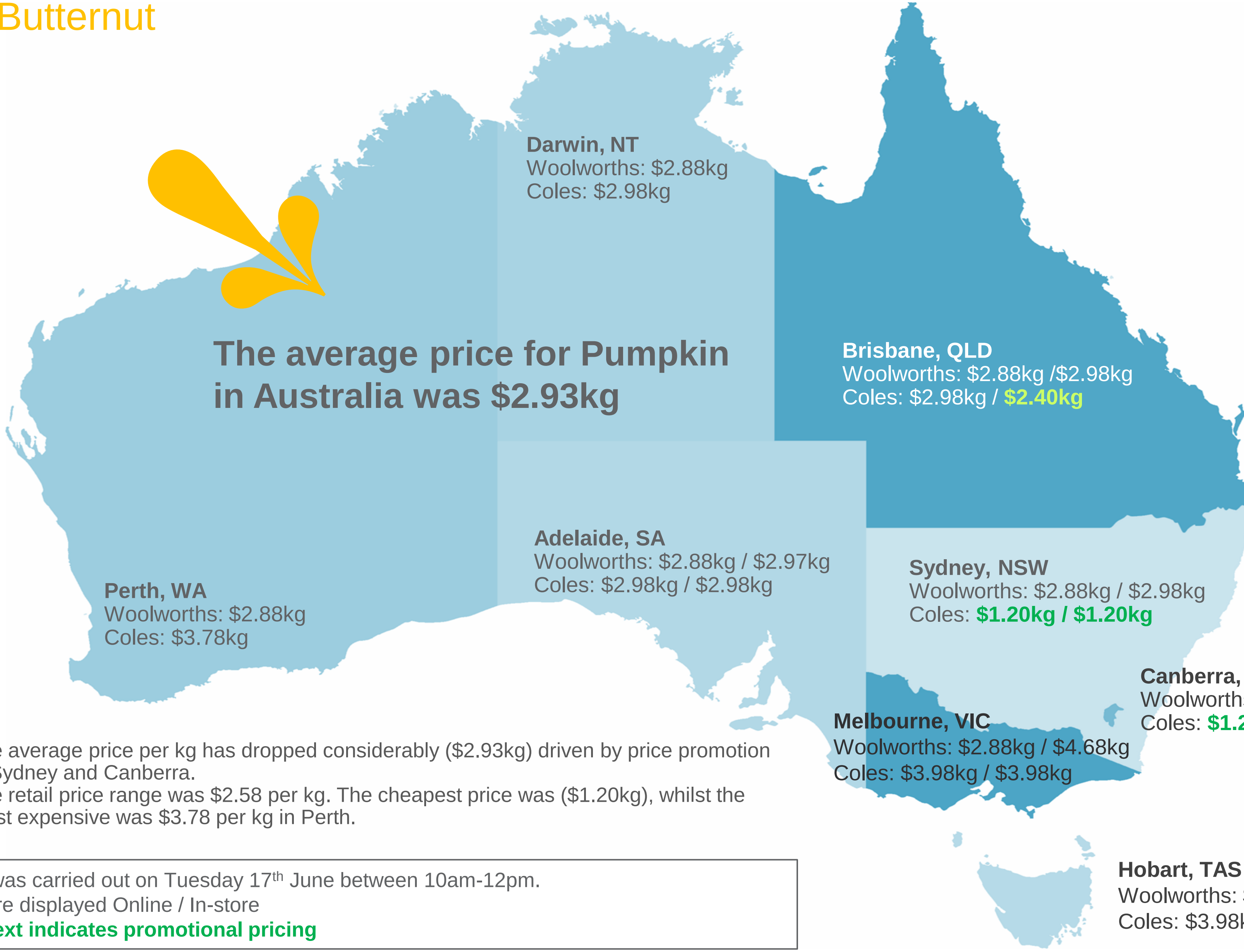


Average number purchased	Half Pumpkin	Whole Pumpkin	Quartered Pumpkin	Pre-packaged Cut Pieces
Wave 13: June 2014	1.2	1.1	1.4	1.5
Wave 17: October 2014	1.2	1.1	1.4	1.4
Wave 21: February 2015	1.1	1.2	1.3	1.8

Q3a. How much pumpkin does this typically equate to?
Sample Wave 13 N=309 Wave 17 N=302, Wave 21 N=311

Online and In-store Commodity Prices

Butternut

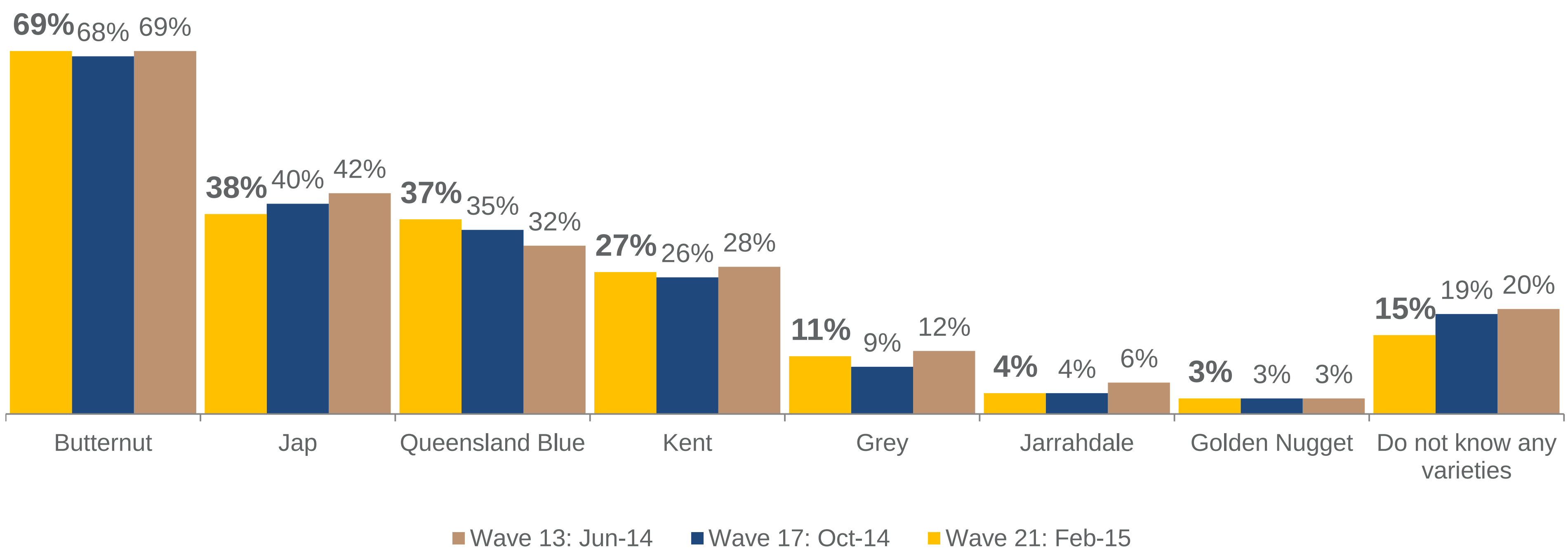


- The average price per kg has dropped considerably ($2.93kg) driven by price promotion in Sydney and Canberra.
- The retail price range was $2.58 per kg. The cheapest price was ($1.20kg), whilst the most expensive was $3.78 per kg in Perth.

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

Spontaneous awareness remains high, with positive recall across multiple types of pumpkin.

Awareness of Queensland Blue pumpkin has steadily increased across waves.



Q6a. What varieties of pumpkin are you aware of? (unprompted)
Sample Wave 13 N=309 Wave 17 N=302, Wave 21 N=311

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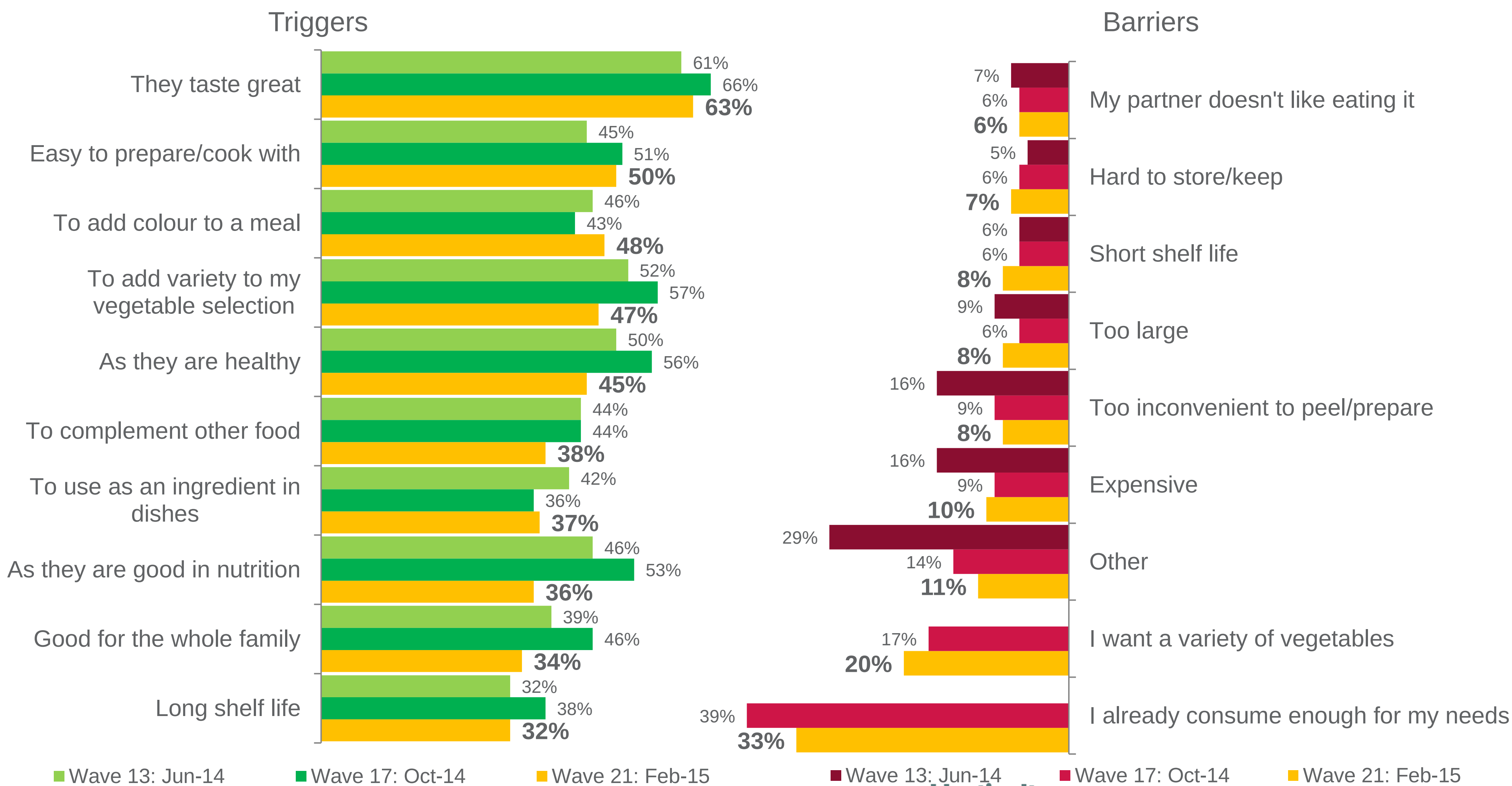
colmar brunton.

Taste is the key driver of pumpkin purchase. This month saw a substantial decline in the importance of nutrition and good for the whole family. Perceptions of consuming enough for needs is the key barrier to purchase.



Q7. Which of the following reasons best describes why you purchase pumpkin?
Q8. Which reason best describes why you don't buy pumpkin more often?
Sample Wave 13 N=309 Wave 17 N=302, Wave 21 N=311

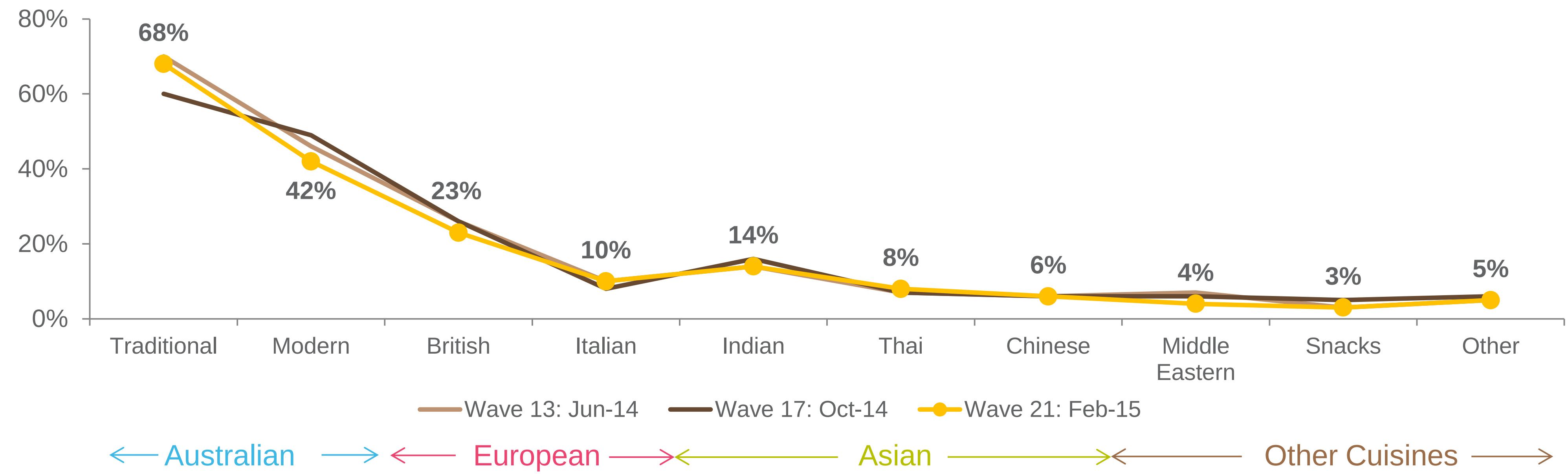
Traditional Australian cuisine remains the popular for pumpkin dishes.

Meal occasions are heavily grounded in dinner consumption, with little variation in other occasions.

Top 5 Consumption Occasions

	Wave 21	Wave 17	Wave 13
Weekday Dinner	66%	64% ▼	64% ▼
Weekend Dinner	48%	51% ▲	50% ▲
Family meals	38%	44% ▲	45% ▲
Every-day	34%	33% ▼	30% ▼
Quick Meals	12%	19% ▲	16% ▲

Typical Cuisine Cooked



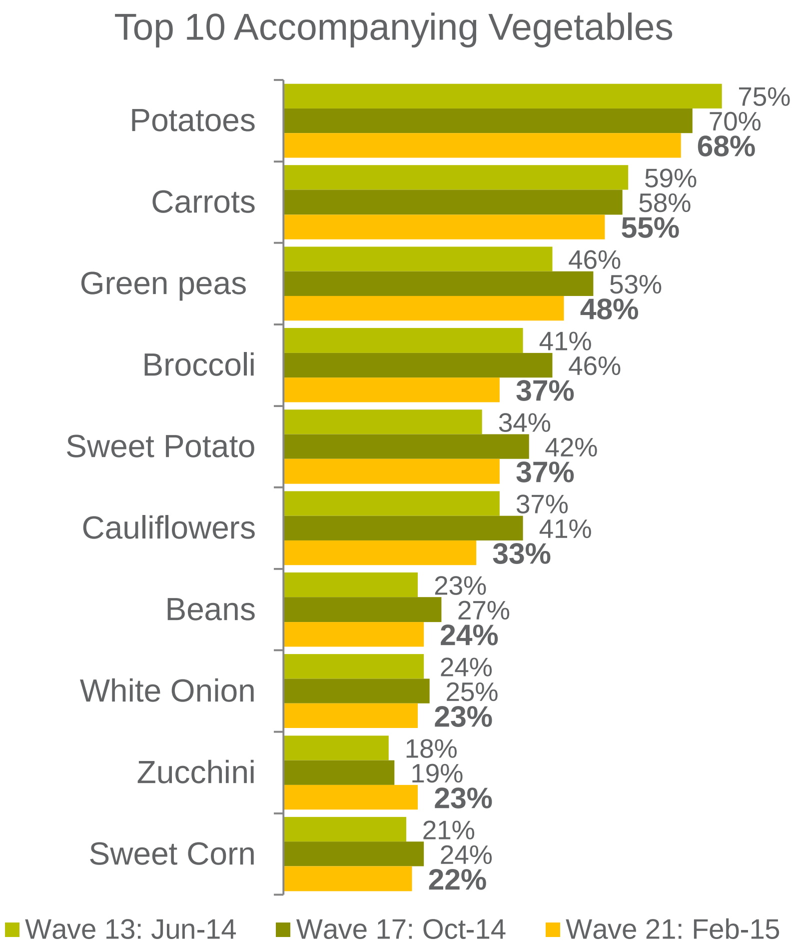
Q10. What cuisines do you cook/consume that use pumpkin?
Q11. Which of the following occasions do you typically consume/use pumpkin?
Sample Wave 13 N=309 Wave 17 N=302, Wave 21 N=311

Horticulture Innovation Australia

colmar brunton.

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

Consumers prefer to serve pumpkin with potatoes, however this is in decline, whilst zucchini is increasingly accompanying pumpkin. Roasting remains the primary cooking style, whilst soup has seen a seasonal decline.

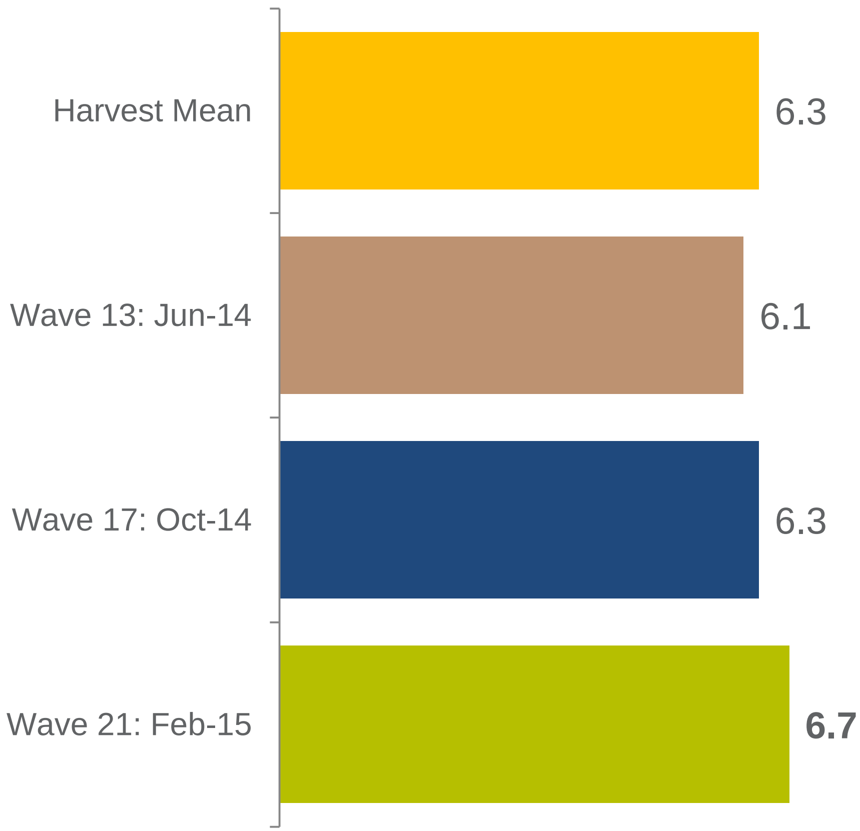


Top 10 Cooking Styles

	Wave 13	Wave 17	Wave 21
Roasting	72%	68%	75%
Mashing	44%	44%	46%
Baking	40%	47%	43%
Soup	55%	46%	41%
Steaming	33%	37%	36%
Boiling	35%	34%	32%
Microwave	20%	15%	22%
Stewing	20%	15%	17%
Stir frying	7%	12%	11%
Puree	14%	12%	8%

Q9. How do you typically cook pumpkin?
Q10a. And when are you serving pumpkin which of the following do you also serve together with this?
Sample Wave 13 N=309 Wave 17 N=302, Wave 21 N=311

There has been a noticeable increase in the importance of pumpkin provenance, which is likely due to recent media coverage on the topic.

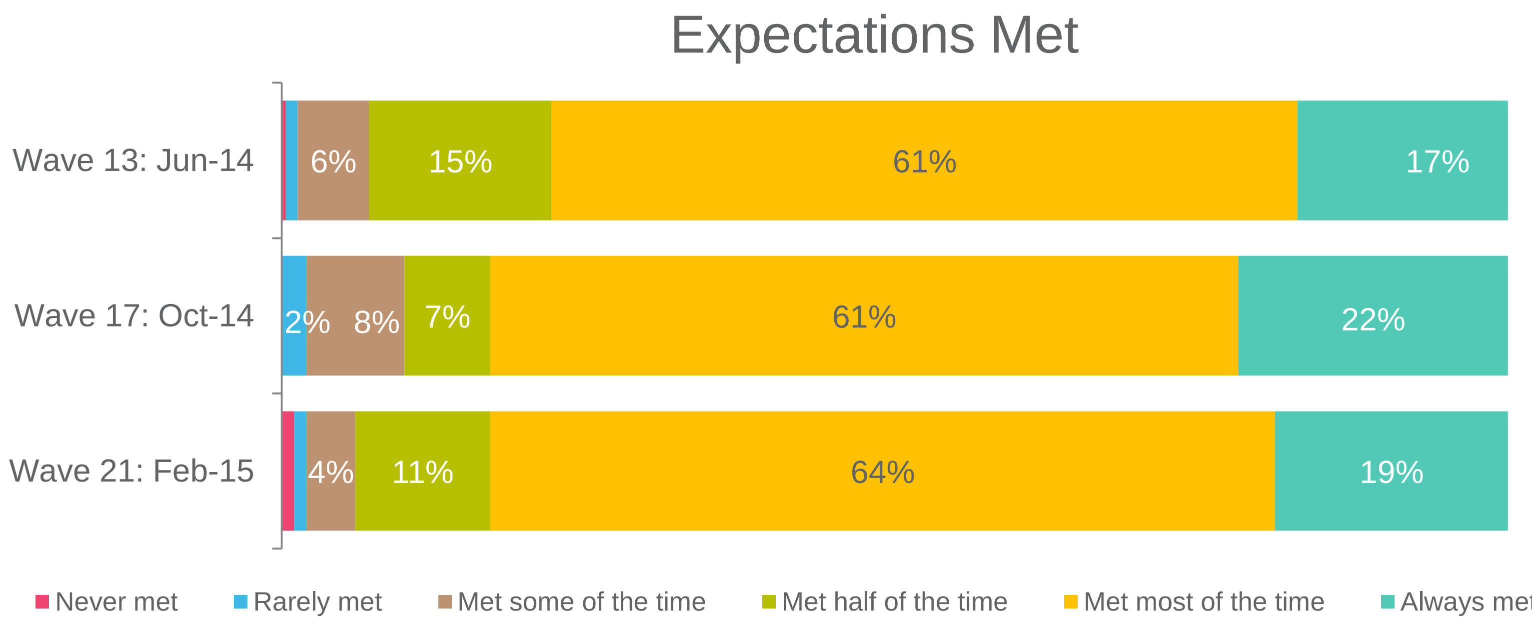


Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 13 N=309 Wave 17 N=302, Wave 21 N=311

Longevity of freshness has directionally declined, however this has not affected consumer expectations, which are generally being met.

Expected to stay fresh for **11.6** days

▲ 12.5 days, Wave 13
▲ 12.0 days, Wave 17



Q12. How long do you expect pumpkin to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy pumpkin?
Sample Wave 13 N=309 Wave 17 N=302, Wave 21 N=311

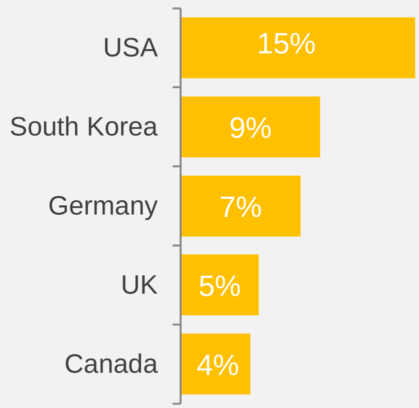
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Pumpkin Product Launch Trends.

Pumpkin Global NPDs
December 2014 – February 2015

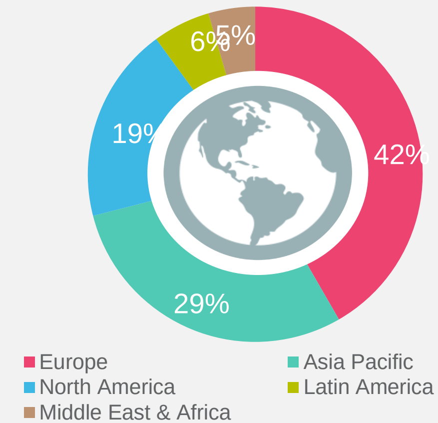
There were 576 products launched in the past three months that contained pumpkin. Europe and Asia Pacific were the main regions for launches, while USA is the key country. Flexible packaging remained the most common format. Launches were predominately in snack and bakery categories.

Country

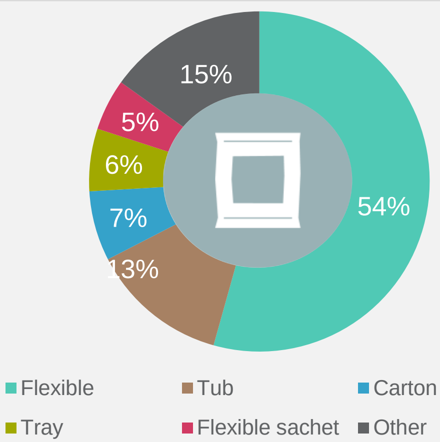


576 Global NPDs

Region



Top Pack Formats



Categories

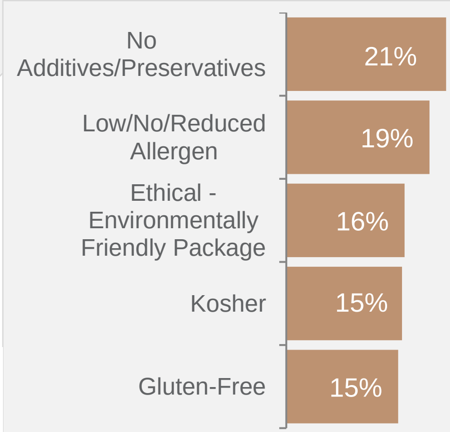
Snacks 27%

Bakery 15%

Breakfast Cereals 8%

Dairy 6%

Top Claims



Pumpkin Product Launches:
Last 3 Months (December 2014 – February 2015)
Summary

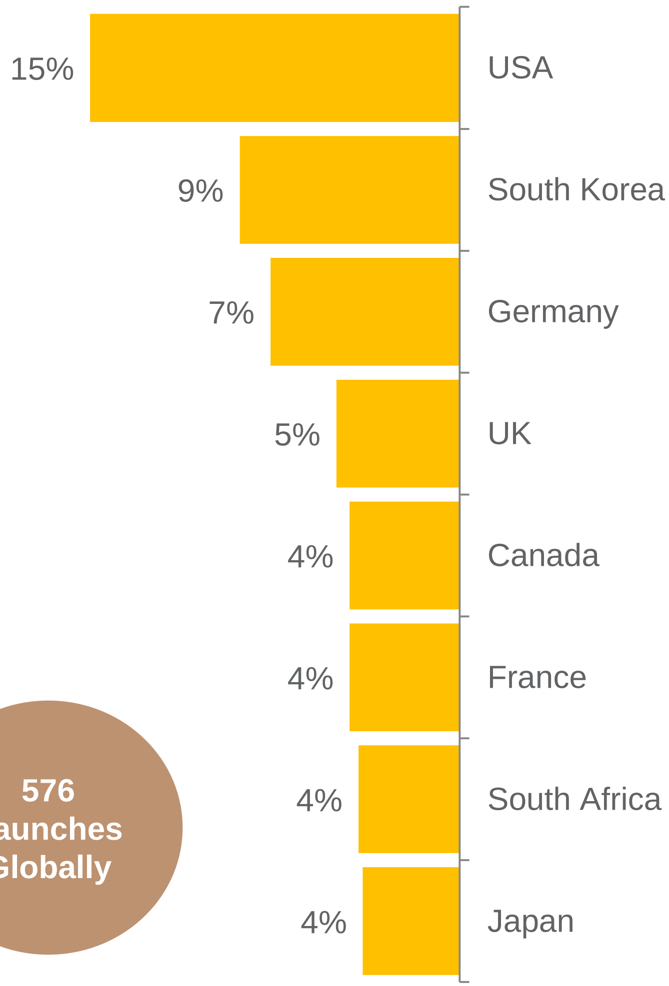
- A total of 576 products containing pumpkin as an ingredient were launched globally in the last 3 months, a decrease on the previous quarter, returning to stable levels post autumn and Halloween season in the most popular launch country, USA.
- There were 16 pumpkin launches in Australia this quarter.
- Europe (42%) and Asia Pacific (29%) were the top regions for launches. Key countries for innovation were USA (15%), South Korea (9%) and Germany (7%).
- Flexible packaging (incl. standing flexible) continues to be the widely used format for launches (54%).
- Top categories for product launches were snacks (27%), bakery goods (15%) and breakfast cereals (8%).
- Core claims for product launches globally were based around health (e.g. no additives/preservatives 21%, low allergen 19%) and ethics (Ethical – Environmentally friendly package 16%).
- The most innovative products were pumpkin and sesame spread launched in Germany and pumpkin paste chocolate launched in Malaysia (examples of products can be found at the end of the pumpkin trend report).

Source: Mintel (2015)

Pumpkin Launches
Country & Categories

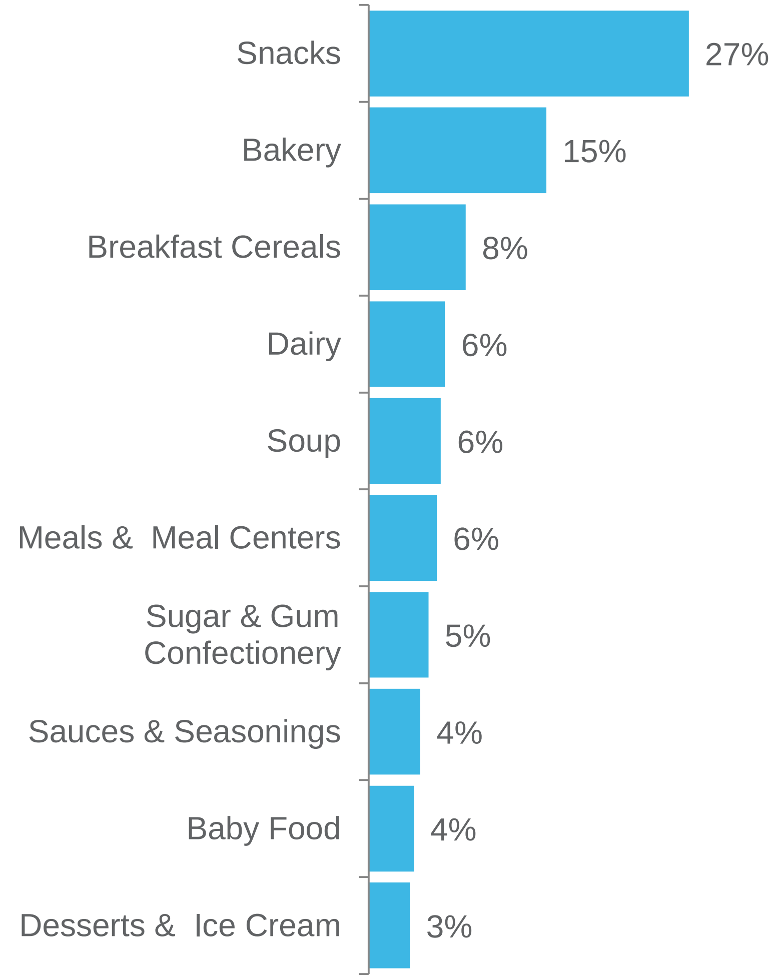
- The most active country for launches in the last 3 months was the USA, followed by South Korea and Germany.
- Snacks remained the key category for launches, with bakery and breakfast cereals also common launches.

Top Launch Countries



576 Launches Globally

Top Launch Categories



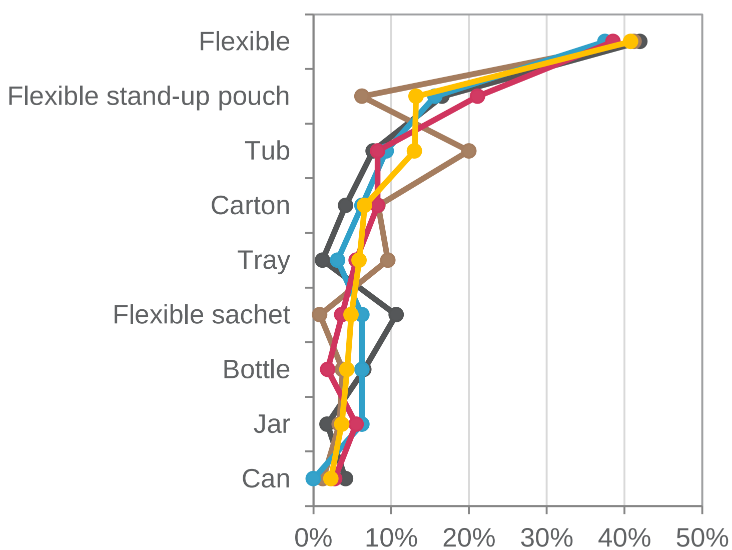
Number of Global Pumpkin NPD for the L3M N=576

Pumpkin Launches

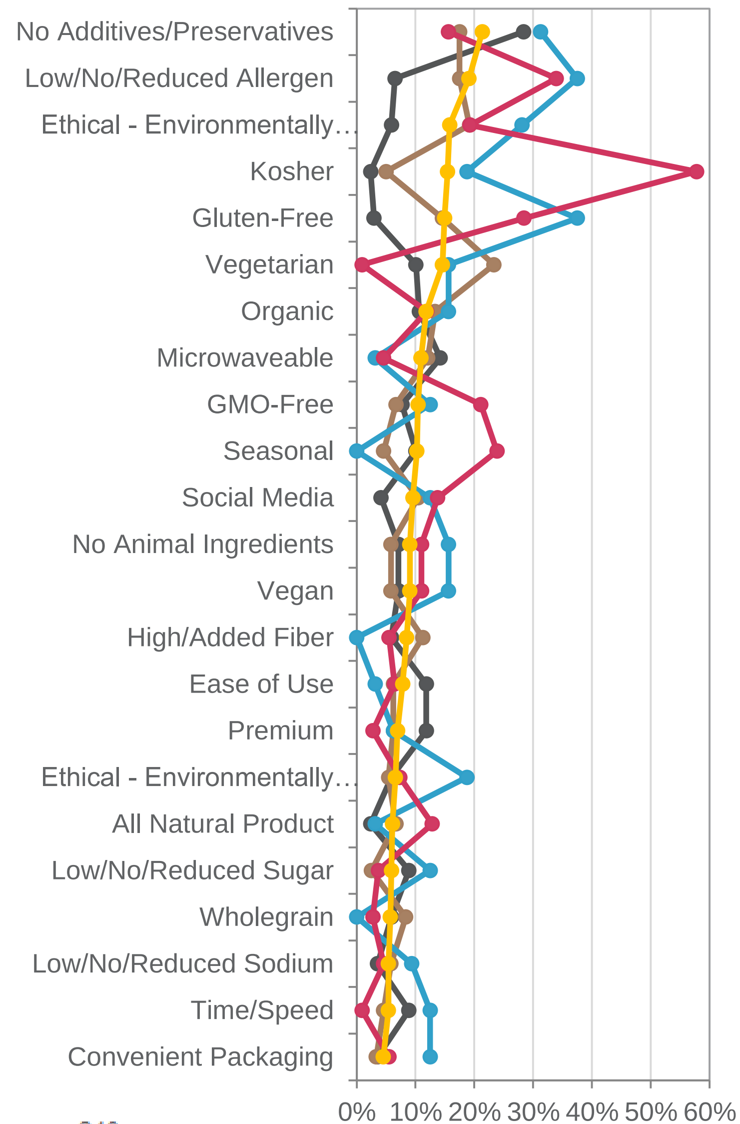
Top Claims & Pack Formats Used

- Pack formats were consistent across regions, with the primary format of choice being flexible packaging.
- Health were the key claims used globally, with no additives being most common, while allergen free and gluten free were more prominent in North & Latin America compared with other regions.

Pack Formats Launched



Top Claims Used



Number of Global Pumpkin NPD for the L3M N=576
Only regions with n >30 are displayed

Innovative Pumpkin Launches:
L3M (December – February 2014/15)

Greenmax Fiber Cup Soup Cream of Pumpkin Soup (Taiwan)

Greenmax Fiber Cup Soup Cream of Pumpkin Soup is added with oat fibre, and is said to be aromatic and mellow. This instant soup is halal certified, and retails in a pack containing three 15g units.

Claims:

Halal, High/Added Fiber, Time/Speed

Bio-verde Fresh Pumpkin & Sesame Spread (Germany)

Bio-Verde Frischer Brot-Aufstrich mit Kürbis & Sesam (Fresh Pumpkin & Sesame Spread) is organic- and vegan-certified. This product retails in a 150g pack.

Claims:

Organic, Vegan, No Animal Ingredients

Marks & Spencer Balanced For You Roasted Butternut Squash & Mushroom Bake (France)

Marks & Spencer Balanced For You Roasted Butternut Squash and Mushroom Bake consists of roasted butternut squash and mushrooms in a lentil, tomato and red pepper sauce, topped with a cottage cheese sauce and seeded crumb. It is said to be hight in protein, which is needed to maintain growth in muscles and balanced carbs, deliciously healthy and balanced, and containing 339 calories per pack. This vegetarian microwaveable product retails in a 390g partly recyclable pack featuring the FSC logo.

Claims:

Low/No/Reduced Calorie, Ethical - Environmentally Friendly Package, Other (Functional), High Protein, Ethical - Environmentally Friendly Product, Microwaveable, Ease of Use, Vegetarian

Kubus Go! Apple, Carrot, Pumpkin & Passionfruit Juice Drink (Poland)

Kubus Go! Sok O Smaku Jablko, Marchew, Dynia i Marakuja (Apple, Carrot, Pumpkin & Passionfruit Juice Drink) has been launched for the Halloween season. This limited edition product is pasteurised, has a high content of vitamin C and is a source of fibre. It is targeted at children and retails in a 300ml pack.

Claims:

Seasonal, Children (5-12), Limited Edition

Source: Mintel (2015)

Innovative Pumpkin Launches:
L3M (December – February 2014/15)

Käpplein Bio Salad Shake with Pumpkin (Germany)

Käpplein Bio Schüttelsalat Kürbis (Salad Shake with Pumpkin) is lactose free, organic certified and made with smoked pumpkin. It retails in a 190g pack with fork included.

Claims:
Low/No/Reduced Lactose, Organic, Low/No/Reduced Allergen

Nestlé Kit Kat Pumpkin Paste Chocolate Countline (Malaysia)

Nestlé Kit Kat Pumpkin Paste Chocolate Countline is available for the 2014 Halloween season. The product retails in a 150.8g pack containing 13 units.

Claims:
Seasonal

Dr. Karg's Genuss mit Biss Cheese & Pumpkin Snack (Germany)

Dr. Karg's Genuss mit Biss Käse-Kürbis Snack (Cheese & Pumpkin Snack) has been relaunched and was previously under the Dr. Karg brand. It has been reformulated to be crispy and thin, and contains 100% whole grains. The oven fresh product contains hearty Emmental and crunchy pumpkin seeds, is made with only natural ingredients, is suitable for vegetarians and is said to be a convenient size. It can be consumed on its own, in soups or with toppings, and retails in a 110g pack with the DLG logo.

Claims:
Ease of Use, All Natural Product, Vegetarian, Wholegrain

Tropicana Essentials Mango Passionfruit and Pumpkin Fruit & Veg Juice (UK)

Tropicana Essentials Mango Passionfruit and Pumpkin Fruit & Veg Juice is now available. The product is said to be a source of vitamin A, potassium and fibre and contains no preservatives, artificial flavours or colours. Vitamin A is said to contribute to the maintenance of normal skin and vision, while potassium contributes to normal muscle function. It is described as a delicious blend of 100% fruit and vegetable juice and it retails in a recyclable 850ml pack featuring the FSC Mix logo.

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

Source: Mintel (2015)

Innovative Pumpkin Launches:
L3M (December – February 2014/15)

Rude Health Pumpkin Fruit & Veg Bar (UK)

Rude Health Pumpkin Fruit & Veg Bar has been repackaged. The bar contains a hint of spice, is high in fibre and suitable for vegetarians. This kosher product is free from gluten, GMO, dairy, added salt and refined sugar. It retails in a 35g pack with Facebook, Twitter, Pinterest and Instagram logos, and was on display at ISM 2015 in Cologne, Germany.

Claims:
Low/No/Reduced Allergen, GMO-Free, High/Added Fiber, Kosher, Social Media, Gluten-Free, Low/No/Reduced Sodium, Vegetarian

Como Pumpkin & Carrot Cream (Spain)

Como Cremas Calabaza y Zanahoria (Pumpkin & Carrot Cream) with olive oil is a source of fibre, low in saturated fats and free from gluten, colourants, preservatives, artificial additives and flavours. This vegetarian and 100% natural product is microwaveable and retails in a 300g pack, serving one.

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

Dean & Deluca Savory Pumpkin Bruschetta (USA)

Dean & Deluca Savory Pumpkin Bruschetta comprises savory and sweet pumpkin with rosemary and sage, and is said to be perfectly balanced. The product retails in a 9.5-oz. pack.

Claims:
NA

Podravka Pumpkin Cream Soup with Sunflower Seeds (Croatia)

Podravka Krem Juha Od Bundeve Sa Sjemenkama Suncokreta (Pumpkin Cream Soup with Sunflower Seeds) has an unbeatable creamy texture, features the taste of fine ripe pumpkin, and is completed with crunchy sunflower seeds. The product is free from taste enhancers, artificial flavours, and is suitable for vegetarians. It can be prepared in five minutes, and retails in a 72g pack which is sufficient for three servings.

Claims:
No Additives/Preservatives, Vegetarian

Source: Mintel (2015)

Top Australian Pumpkin Launches:
L3M (December to February 2014/15)

Woolworths Select Winter Vegetables Soup
The Salad Servers Pumpkin & Cous Cous Salad

La Gina All Good La Zuppa Moroccan Pumpkin with Chickpea Soup

Baby-O Organic Meals Organic Minted Lamb with Vegetables

Rafferty's Garden Sweet Corn, Pumpkin & Cranberry Fruit

The Soup Co. Spicy Pumpkin Soup

The Salad Servers Pumpkin & Cous Cous Salad

Birds Eye Oven Roast Potato, Carrot and Pumpkin with Italian Herbs

Baby-O Organic Puree Creamy Pumpkin & Spinach with Pasta

Source: Mintel (2015)

In the Media.

General Vegetable News
(December to February 2014/15)

- The recent hepatitis A outbreak caused by frozen berry imports are set to force a major change in the country-of-origin labelling laws in Australia. The Abbott Government believes that the potential introduction of pie charts or other symbols on food packaging will make it easier for shoppers to work out where their food comes from.

- Industry Minister Ian Macfarlane and Agriculture Minister Barnaby Joyce will present a labelling reform proposal to Cabinet by the end of March.

www.abc.net.au

Commodity News

(December – February 2014/15)

- Cauliflower has been revealed as the seventh most commonly bought vegetable leading into Christmas, with carrots being first on the list.

www.abc.net.au

- Over the Christmas period, vegetables that are more suited to barbecuing, like pumpkin, are expected to produce higher sales.

www.abc.net.au

- Rigorous new testing measures have been introduced for imported carrot seeds in order to keep out a bacterium rapidly spreading across Europe.

www.abc.net.au

- Green beans are available fresh, frozen or canned. When buying fresh, choose beans that are crisp and bright green in colour. Refrigerate in a bag to maintain freshness. They are rich in vitamins A, C and K and also contain folate, thiamin, riboflavin, iron, magnesium and potassium.

http://www.medicalnewstoday.com/

Horticulture Innovation Australia

colmar brunton.

Thanks.