Monthly Tracker Report, Wave 22.
Commodities: Broccoli, Sweet Corn, Lettuce & Chillies

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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 of and behaviour in relation to fresh vegetables.

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

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

This wave's report (Wave 22, March 2015) focuses on:

- Broccoli
- Chillies
- Lettuce
- Sweet Corn

This is the sixth wave of tracking for these specific commodities. This current report will highlight any changes observed over the past twelve months.

This project has been funded by HIA Ltd 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 two ad-hoc questions were 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, 667 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 fortnight

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

⇛Were the main or joint grocery buyer.

	Total N=667	Broccoli n=317	Chillies n=253	Lettuce n=314	Sweet Corn n=311
Gender					
Male	39%	40%	35%	42%	37%
Female	61%	60%	65%	58%	63%
Age					
18-24 y.o	6%	3%	9%	6%	4%
25-34 y.o	21%	19%	30%	16%	19%
35-44 y.o	17%	17%	17%	16%	20%
45-54 y.o	20%	19%	20%	18%	23%
55-64 y.o	20%	21%	15%	25%	19%
65+ y.o	16%	21%	9%	19%	16%
Household					
Single Income no kids	18%	17%	20%	21%	15%
Double Income no kids	22%	20%	28%	16%	22%
Young Families	16%	15%	16%	14%	18%
Established Families	22%	20%	24%	20%	24%
Empty Nesters	22%	28%	12%	29%	21%
Location					
New South Wales	24%	20%	28%	23%	22%
Victoria	20%	21%	20%	19%	23%
South Australia	13%	17%	10%	16%	12%
Queensland	20%	17%	22%	19%	20%
Western Australia	16%	15%	16%	16%	17%
Tasmania	3%	4%	1%	3%	2%
Australian Capital Territory	4%	5%	3%	3%	4%
Northern Territory	0%	0%	0%	1%	0%

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

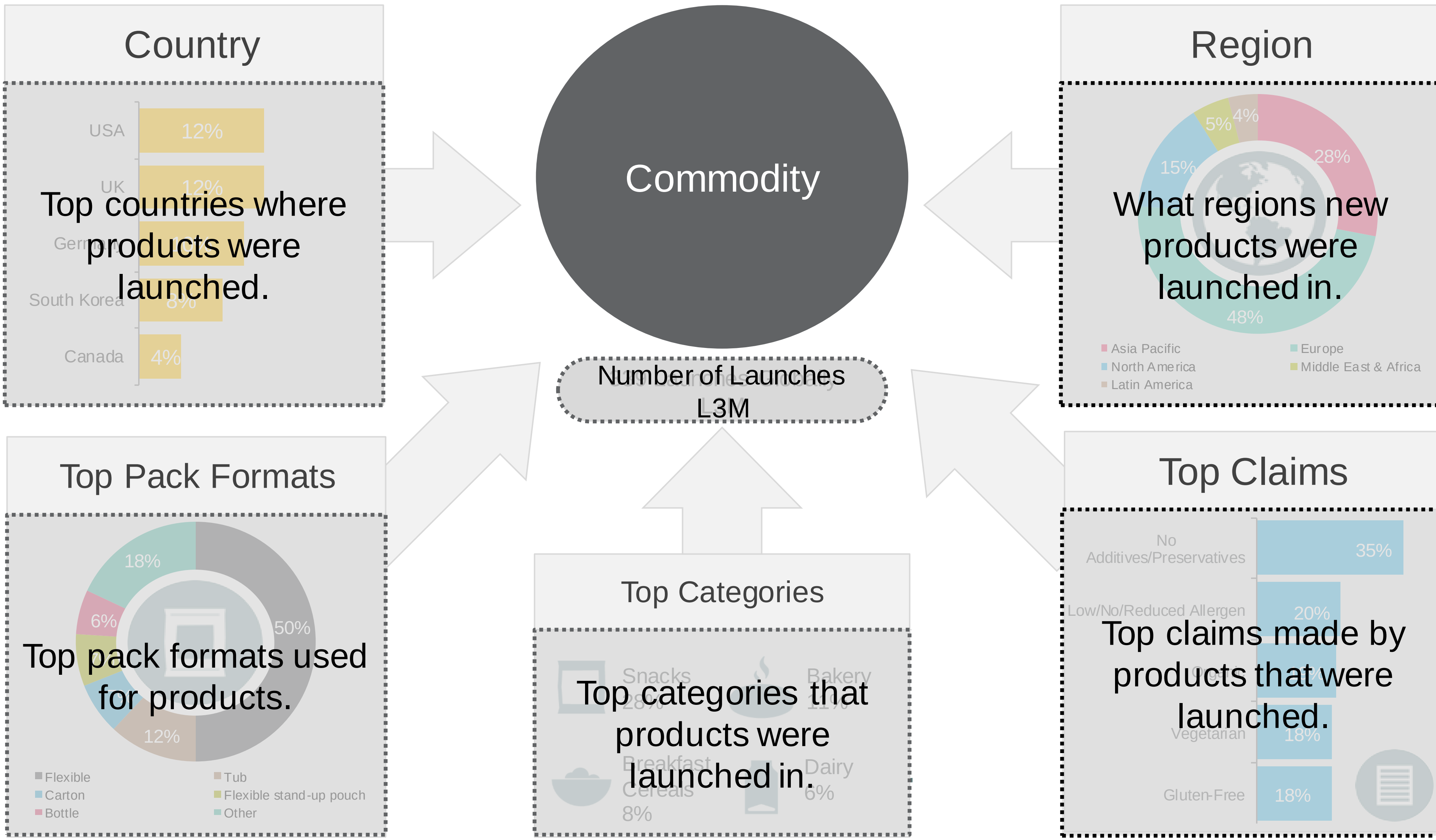
Trends Research: Our Approach

- Colmar Brunton has used a combination of both desk research and in the field market research to explore the trends for 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 three 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.

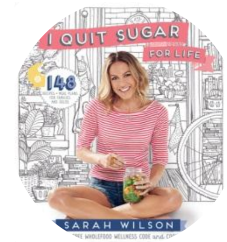


Wave 22: Executive Summary

Industry Insight

There has been much media attention in recent times regarding Australian diets: what should we be eating, as well as be avoiding, if we want to live longer, healthier and maybe even slimmer?
Whether celebrity endorsed or academically backed, the concept of the ideal diet is ever-changing and the subject of ongoing fierce debate.

Three diets that have attracted much attention in both social and traditional media over recent months have been the Paleo (Caveman) Diet, the I Quit Sugar (IQS) movement and the Pro-Vegetarian Diet. Paleo instructs us to avoid grains, legumes, too much fruit and sugar; the IQS movement aims to eliminate fructose and processed foods; and the Pro-Vegetarian diet advocates for a higher proportion of plant-based foods compared to animal-based foods.



Industry Insight continued

We have also seen Australian consumers move away from "diet products", moving towards more natural, full fat options. A striking example of this is the decreased market share of No Fat yoghurt offers versus the proliferation of Greek-style products and the move away from artificially sweetened soft drinks towards those naturally sweetened by ingredients such as stevia.

Regardless of the specifics, prevailing market and diet trends all emphasise the consumption of naturally occurring ingredients. The future prediction based on consumer sentiment is that this will continue to grow in importance as consumers move towards viewing food as medicine, customised specifically for their needs.

All in all, this is a positive story for fresh, high-quality Australian-grown vegetables and one that can be leveraged by the Australian vegetable industry. Finding ways of endorsing the specific psychological and physiological benefits of consuming vegetables in a way that is easily understood by consumers will be key in capitalising on this trend.

Wave 22: Fast Facts
(1 of 2)

Broccoli:

- Consumer sentiment was in line with the Harvest average for all vegetables tracked thus far. Future purchase looks to remain stable.
- On average broccoli is purchased 4 times per month and consumed on 10 occasions per month. Mainstream retailers are the main purchase locations.
- Consistent with previous months, 700g of broccoli is typically purchased. Value for money fell this wave: consumers only perceive fair value. Individual heads of broccoli are the preferred format.
- National pricing analysis revealed an average of $4.65 per kg, which is higher than November 2014 prices.
- Overall awareness of broccoli types remains low, with over half of consumers unable to recall any variety of broccoli, and little differentiation between types.
- The key motivations for purchasing broccoli continue to be health and nutrition influences. The main barriers to purchase are shoppers already consuming enough for their needs and wanting a variety of vegetables in their diet.
- Broccoli is expected to remain fresh for a week. Expectations of freshness are stable and in line with previous waves.

Chilli:

- Chillies hold strong importance to consumers and are likely to be recommended to family and friends. There is strong future purchase intent for chillies.
- Chillies are purchased 4 times a month and consumed 12 occasions per month, consistent with past months. Purchase is from mainstream and specialist retailers.
- Consumers generally purchase 300g of chillies, with recalled last spend lower at $4.00. Overall, chillies are perceived as fair value for money.
- Pricing analysis revealed the average national price for long red chillies was $17.28 per kg, in line with November 2014 prices.
- There is a high level of recall for chilli varieties. Jalapeno and birds eye have the greatest awareness amongst consumers.
- Main triggers for purchasing chillies are to use as an ingredient in dishes and taste. The key barriers to purchase are consuming enough for their needs. Expense is an increasing barrier to purchase.
- Chillies are expected to remain fresh for over 11 days, and this freshness is met most of the time.

Wave 22: Fast Facts
(2 of 2)

Lettuce:

- Lettuce holds high levels of importance and satisfaction with consumers. Future purchase intent looks stable.
- Lettuce is purchased on average 5 times per month and consumed frequently, 14 occasions per month. Purchase is primarily from mainstream retailers.
- On average consumers are purchasing 600g of lettuce, which is slightly down on past months. Recalled last spend was $3.30. Value for money is perceived as fair.
- Price tracking revealed an average price of $2.86 per Iceberg lettuce head. This is slightly higher than November 2014 prices.
- There is a high level of awareness of lettuce types, especially Iceberg and Cos.
- The main motivations for purchasing lettuce are health and complementing other food. Already consuming enough and short shelf life are the key barriers to purchase. There is an increasing trend towards consumers growing their own lettuce.
- Lettuce is expected to stay fresh for a week. Expectations of freshness were met most of the time consistent with previous waves.

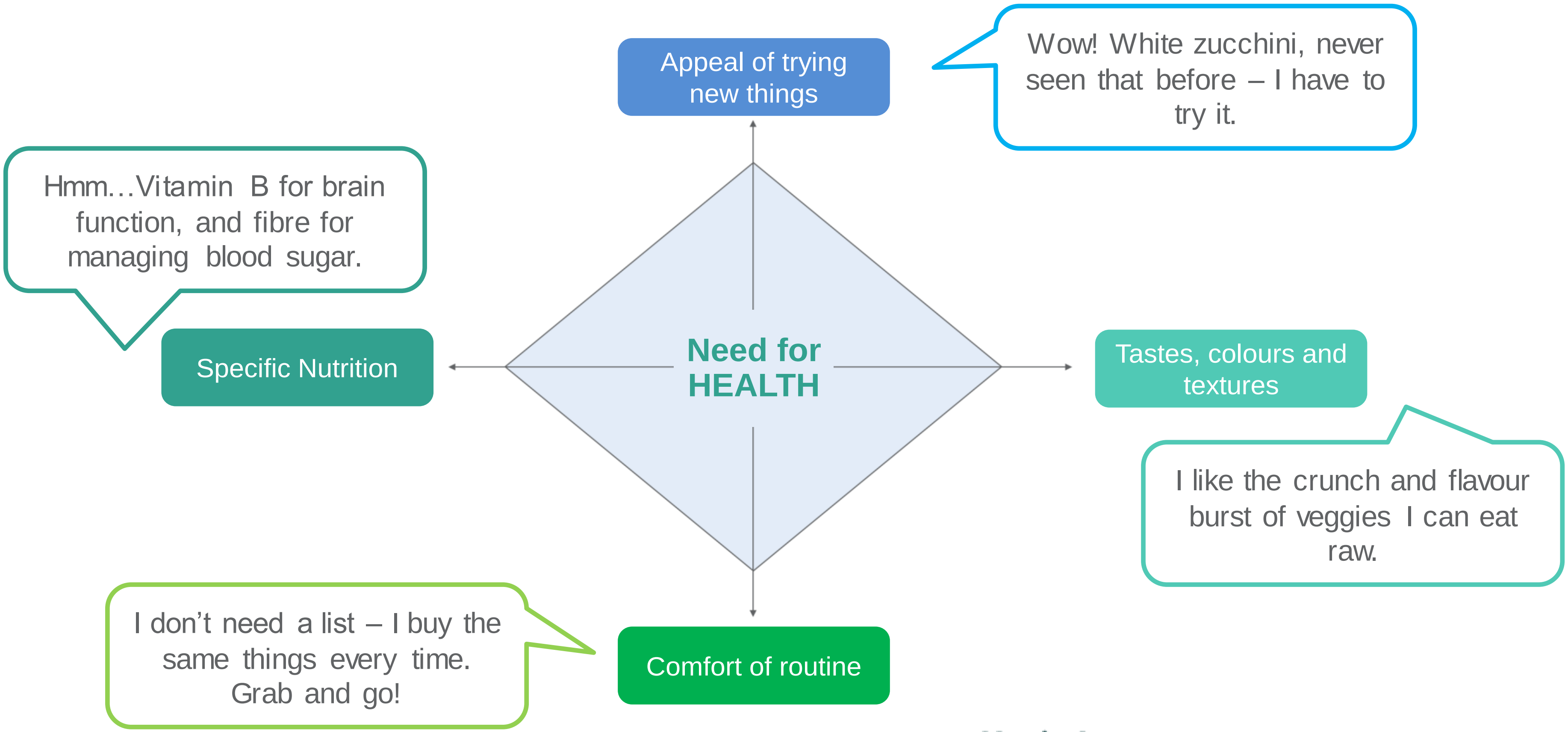
Sweet corn:

- Consumers are likely to recommend sweet corn to family and friends. There is strong future purchase intent, with some consumers indicating they will increase the amount they currently purchase.
- Purchase frequency of sweet corn is 3 times per month and on average sweet corn is consumed 7 occasions per month, which is in line with past months.
- Consumers consistently purchase 900g of sweet corn. Perceived value for money is higher and it is considered good value for money.
- Analysis of pricing nationally revealed an average price of $1.14 per cob. Pricing has remained relatively stable across months.
- Awareness of sweet corn remains very low, with three in ten consumers unable to recall a type.
- Taste is the primary trigger to purchase. Ease of preparation is becoming a stronger influence on purchase across waves. Consuming enough for their needs is the main barrier to purchase.
- Consumers expect sweet corn to remain fresh for approximately 8 days, and this longevity is likely to be met most of the time.

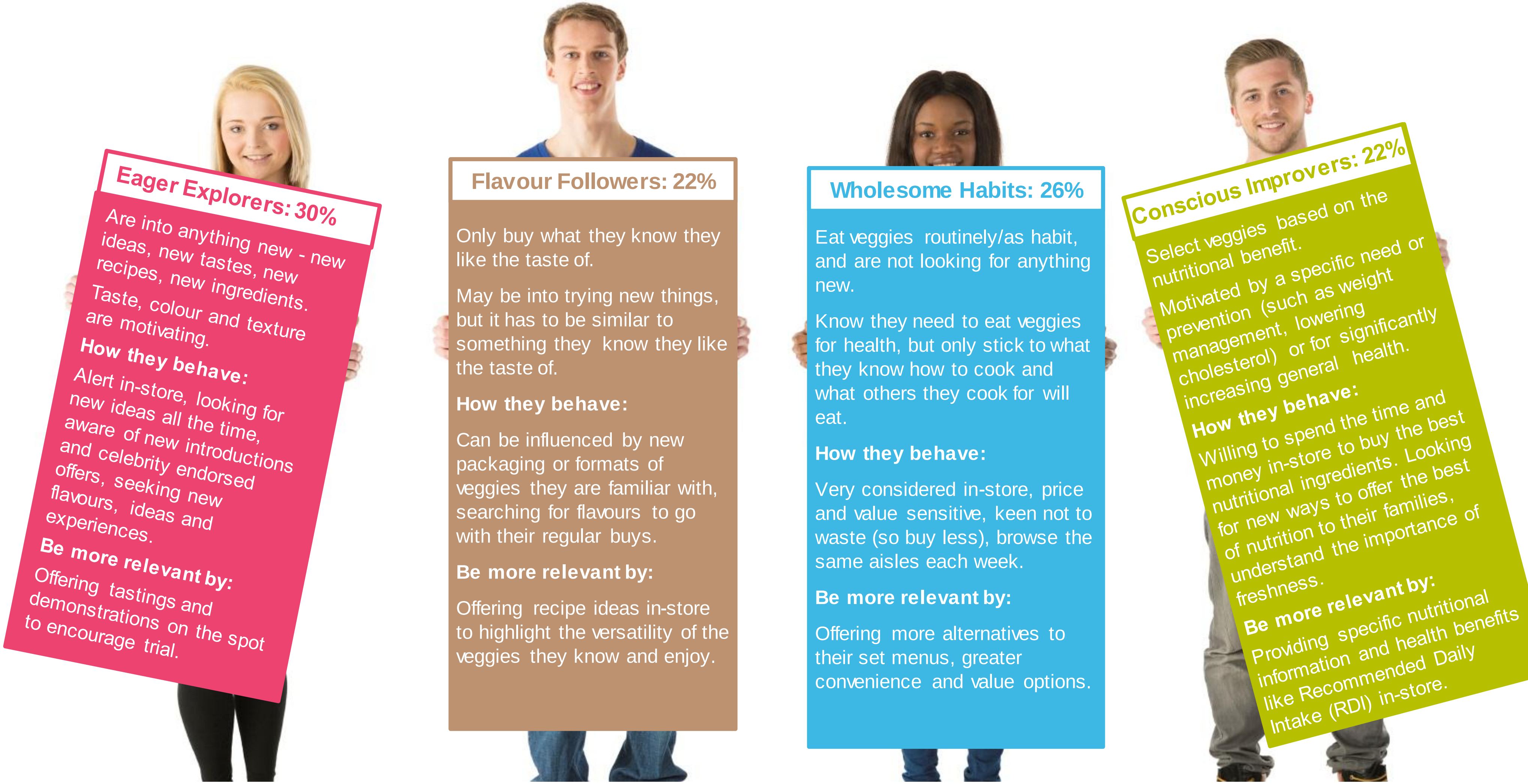
Wave 22: Consumer Segmentation

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'

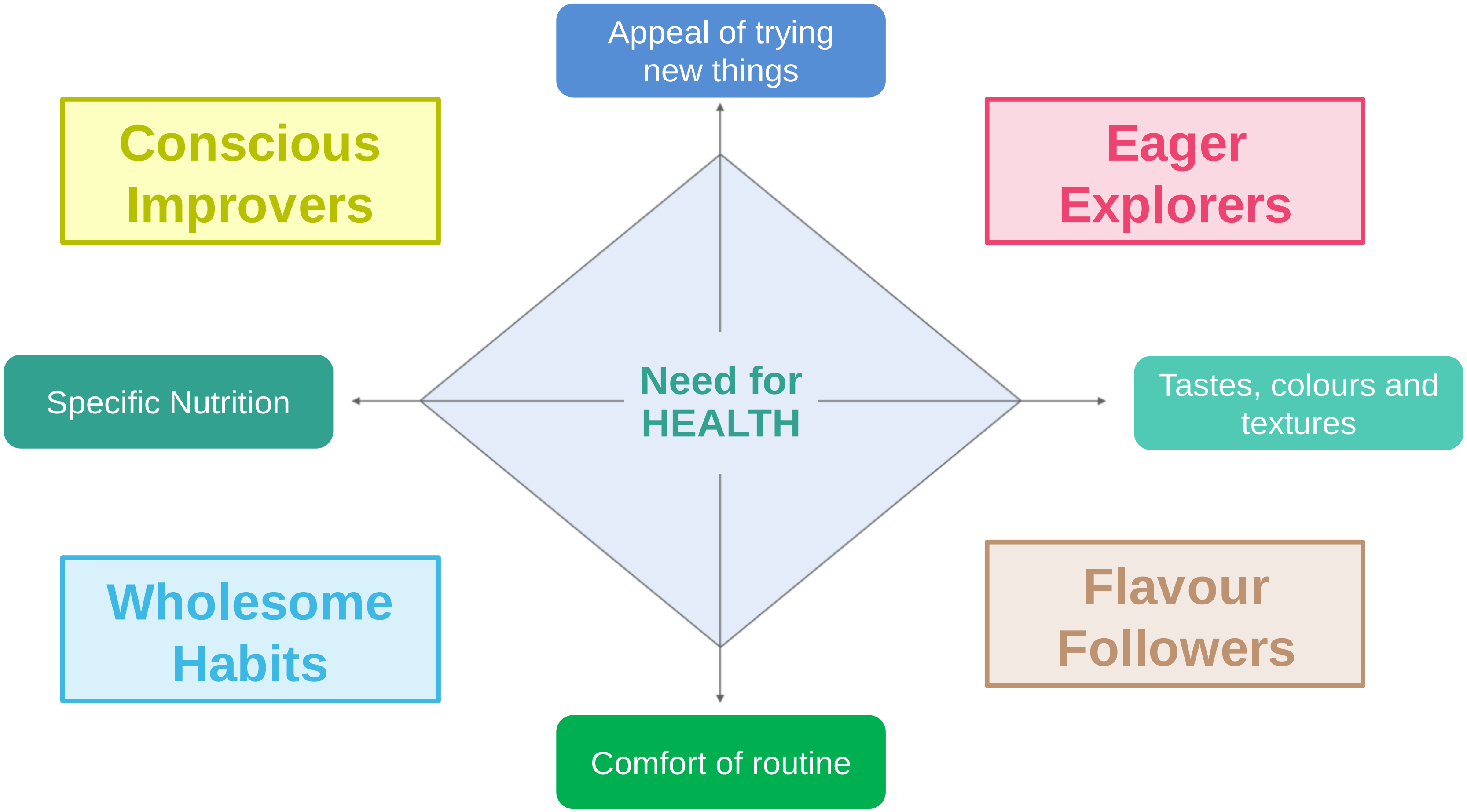


The result is four distinct segments of consumers in the market place



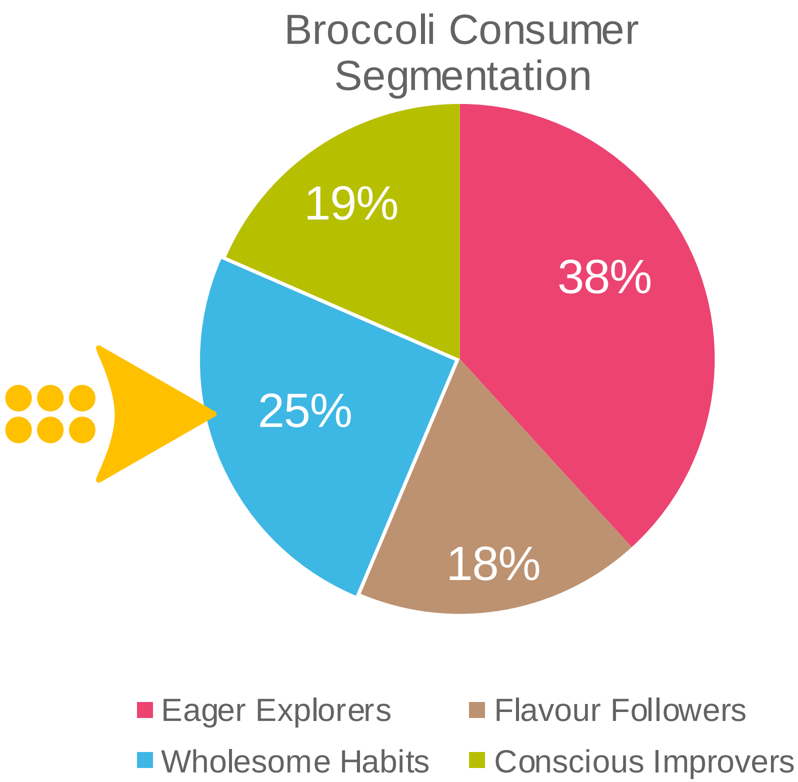
The segment names reflect behaviours and core needs

The segments are named to reflect behaviours and core needs



Broccoli Grower Action Plan

Target: Wholesome Habits consumers



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

Be more relevant by:

Investigate convenient new products and that are packaged and prepared, such as broccoli florets or de-stemmed heads as well as combination packs including carrots and potatoes.

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

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.*

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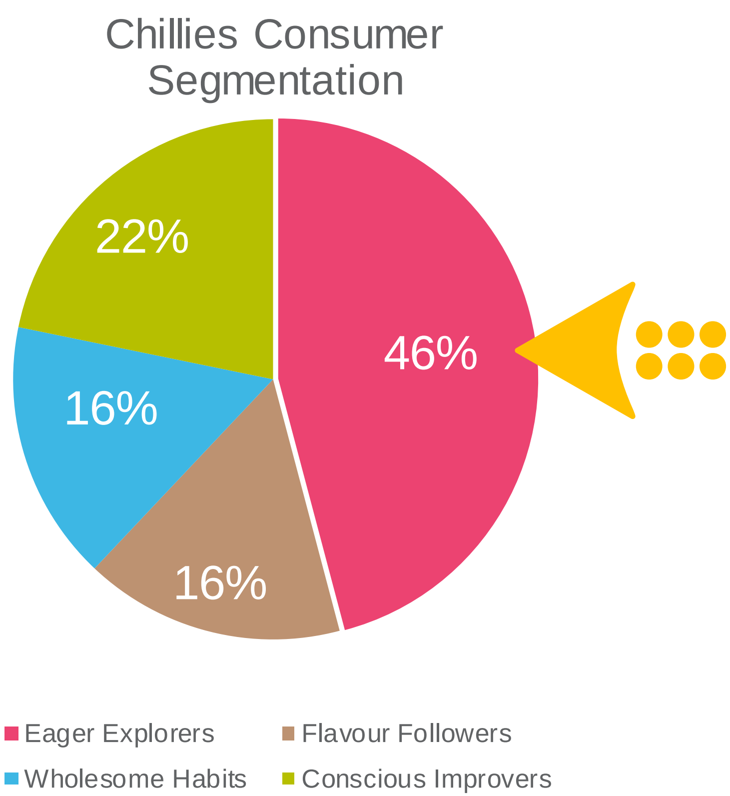
Chillies Grower Action Plan

Target: Eager Explorer consumers



Your vegetable noticeably appeals to the **Eager Explorers** consumers. Nearly one in two consumers of chillies are Eager Explorers and they are interested in the taste, colour and texture of chillies.

Be more relevant by:

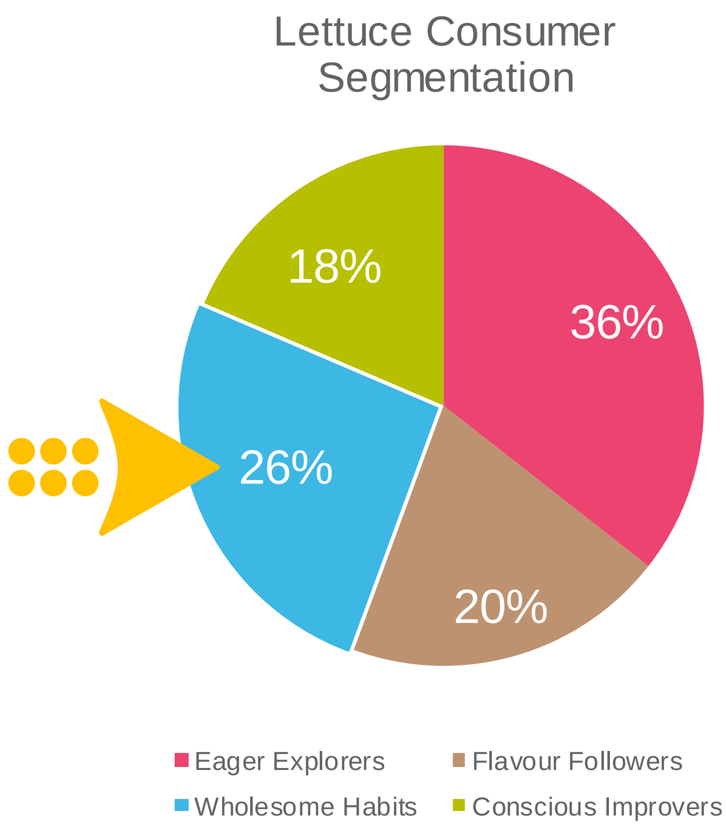
To attract these consumers tell them what taste chilli will bring and new ways that they can cook and use it. In-store displays that are colourful and promote freshness and quality will appeal.

To reduce any alienation of consumers, clearly communicate spice and heat expectations for all chillies, such as a heat scale. Provide serving instructions to enhance cooking experiences.

**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.*

Lettuce Grower Action Plan

Target: Wholesome Habits consumers



Your vegetable appeals to the **Wholesome Habits** consumers. These consumers eat lettuce routinely/as habit, and are not looking for anything new.

Be more relevant by:

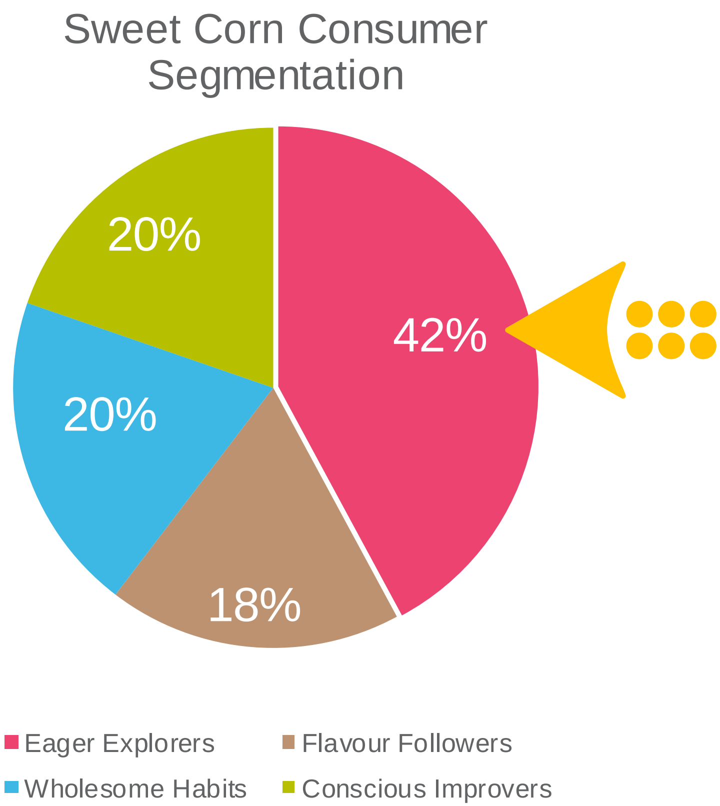
These consumers are looking for value for money and convenience in-store. Providing a range of formats, from single serve to family size lettuce options, will reduce possible wastage and increase perceptions of value.

Communicate the factors and attributes that differentiate each type of lettuce at the point of sale including taste expectations, best use and cooking style of each. Providing detailed information will encourage trial throughout the lettuce range.

**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.*

Sweet Corn Grower Action Plan

Target: Eager Explorer consumers



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

Be more relevant by:
To attract these consumers, tell them what taste your vegetable will bring and highlight new ways that they can cook and use sweet corn. Provide recipe and cuisine ideas, outside of the typical Australian, including Mexican and Chinese.
In-store displays that are colourful and promote freshness and quality will appeal to consumers. In-store tastings and cooking demonstrations may encourage new purchases as these consumers see first-hand how to incorporate sweet corn into their cooking repertoire.

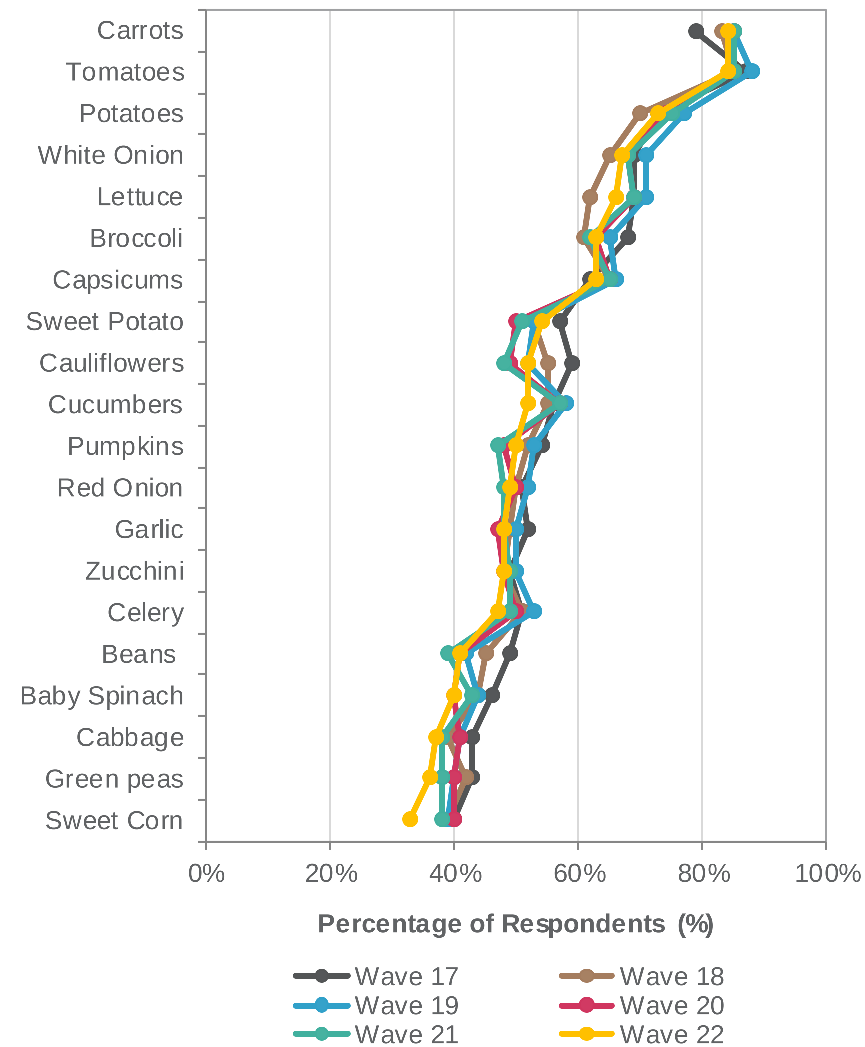
**The target consumer segment is based on which segments this vegetable over indexes compared to Total Vegetable Consumers. It is not based solely on the size of the segment.*

Wave 22: Overall Vegetable Tracking

Top 20 Vegetables Purchased Last Month

Carrots, tomatoes and potatoes continue to be the staple vegetables, purchased regularly every month.

Vegetable purchase in March is consistent with past months. The greatest variation in purchase over the last six months has been for cauliflower.



Sample Wave 22 N=1483 *(base in higher as Q appears in Screener)*
S8. Which of the following fresh vegetables have you purchased in the last month?

Category Health Explained

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

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

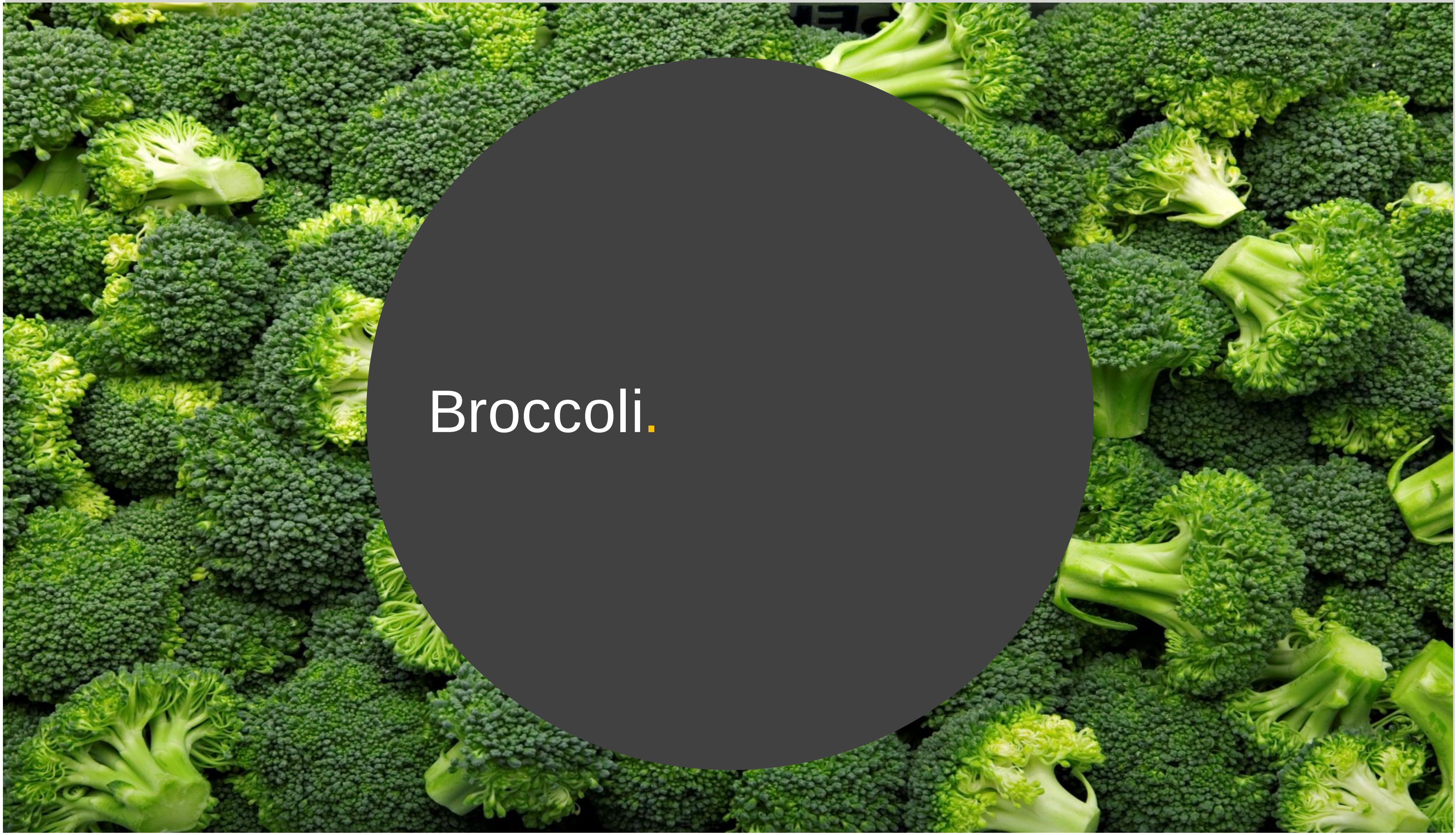
- How **important** to you is having a range of *commodity* available in the store where you usually shop?
- How **satisfied** or dissatisfied are you with the range of *commodity* currently available?
- How likely would you be to **recommend** *commodity* to your family and friends?
- How interested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

Category health and consumer sentiment remains strong, specifically for importance and endorsement.

Chillies continue to have have strong future purchase intent, whilst the other commodities appear stable.

	Broccoli	Chillies	Lettuce	Sweet Corn	Harvest Total Mean
Importance	6.3	6.9	6.8	6.4	6.3
Satisfaction	6.6	6.3	6.8	6.5	6.6
Endorsement	6.9	7.2	6.5	6.9	6.8
Interest (New Varieties)	5.9	6.9	6.0	6.2	6.1
Future Purchase					
More	8%	28%	11%	13%	14%
Same	92%	70%	88%	86%	84%
Less	0%	2%	2%	1%	2%

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



Broccoli.

Consumption of broccoli remains stable across previous waves, whilst purchase frequency has seen a slight decline.

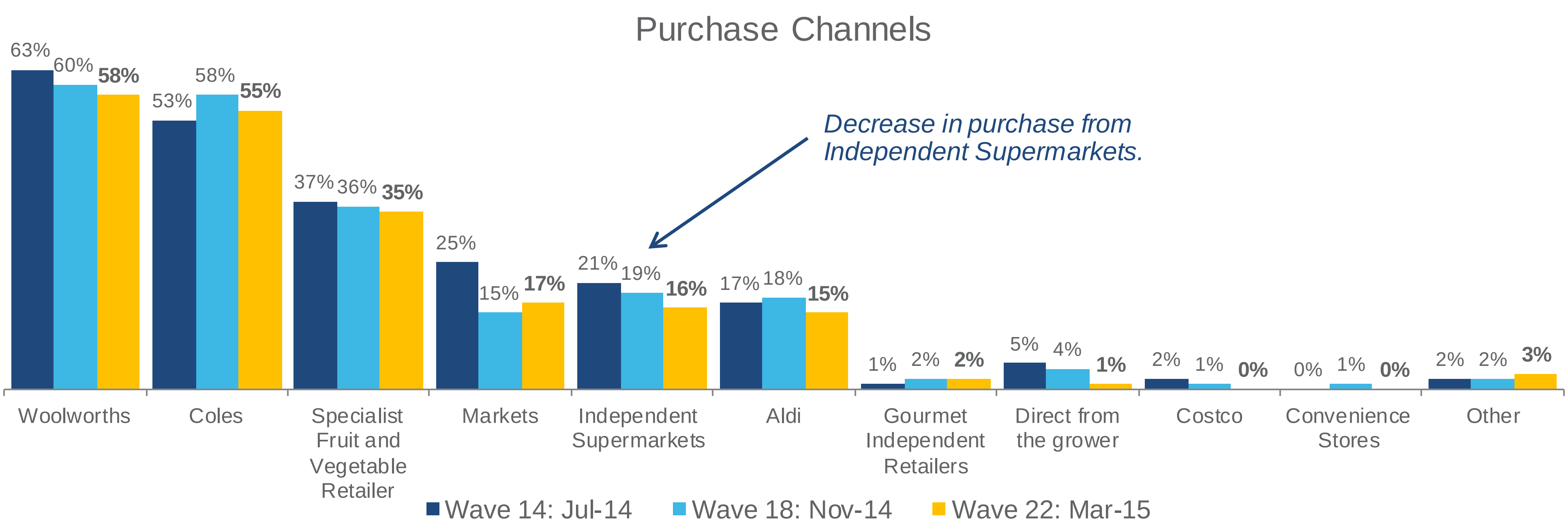
Purchase is typically from mainstream retailers.

Average Purchase **4.2** times per month

▲ 4.6 times, Wave 14
▲ 4.3 times, Wave 18

Average Consumption **10.1** times per month

— 10.1 times, Wave 14
▼ 10.0 times, Wave 18



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 14 N=314, Wave 18 N=399, Wave 22 N=317

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

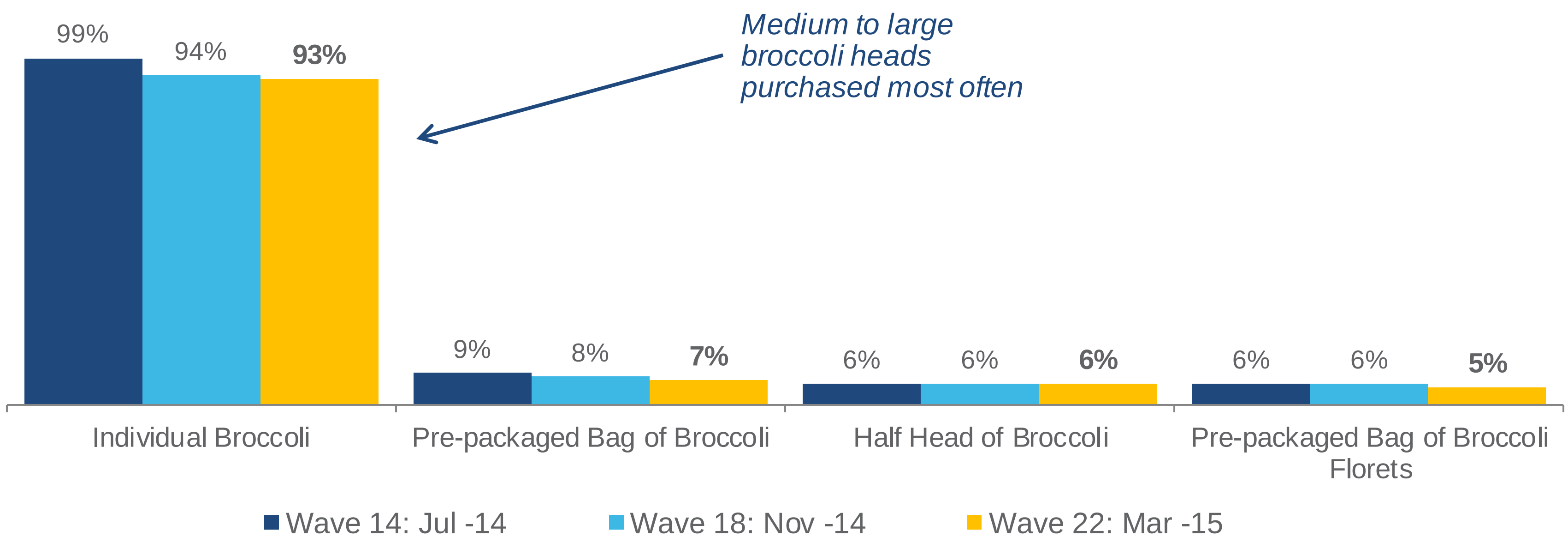
Average Spend and Price Sensitivity

Average weight of purchase	Recalled last spend	Value for money
The average consumer typically purchases **700g** of broccoli, which is in line with previous months.	The average recalled last spend was **$3.70** in March, which is consistent with July last year.	On average, consumers perceived broccoli to be fair value for money **(6.1/10).** There has been noticeable variability in value perceptions across waves.
▲ 800g, Wave 14 — 700g, Wave 18	— $3.70, Wave 14 ▼ $3.50, Wave 18	▼ 5.9/10, Wave 14 ▲ 6.4/10, Wave 18

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 14 N=314, Wave 18 N=399, Wave 22 N=317

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

Individual broccoli heads remain the main format purchased by consumers. Consumers usually purchase one to two heads when shopping.

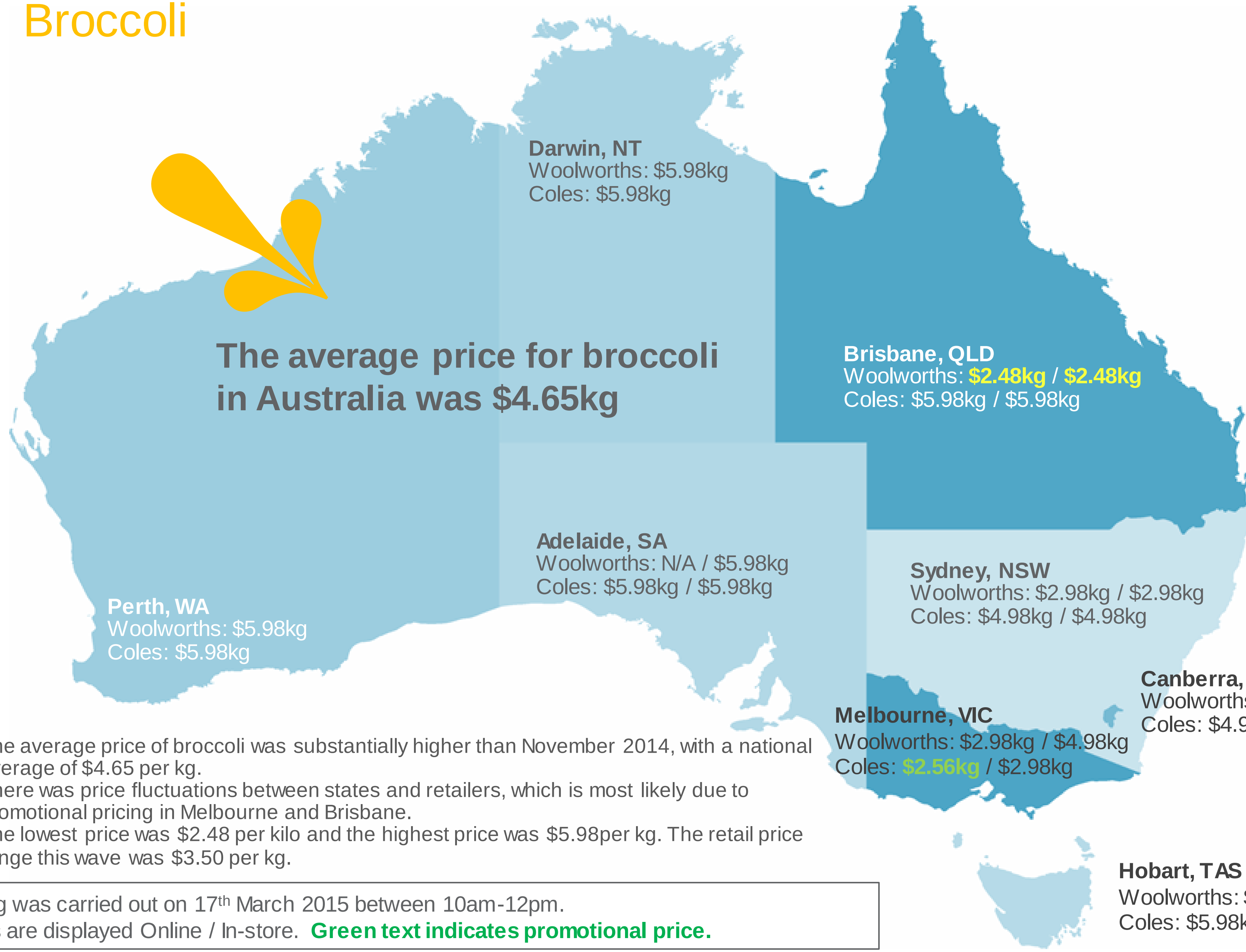


Average amount purchased per shop	Individual Broccoli	Pre-packaged Bag of Broccoli	Half Head of Broccoli	Pre-packaged Bag of Broccoli Florets
Wave 14: July-14	2.1	1.0	1.6	1.4
Wave 18: Nov-14	1.8	1.5	1.2	1.5
Wave 22: Mar-15	1.6	1.4	1.4	1.8

Q3a. How much <commodity> does this typically equate to?
Sample: Wave 14 N=314, Wave 18 N=399, Wave 22 N=317

Online and In-store Commodity Prices

Broccoli



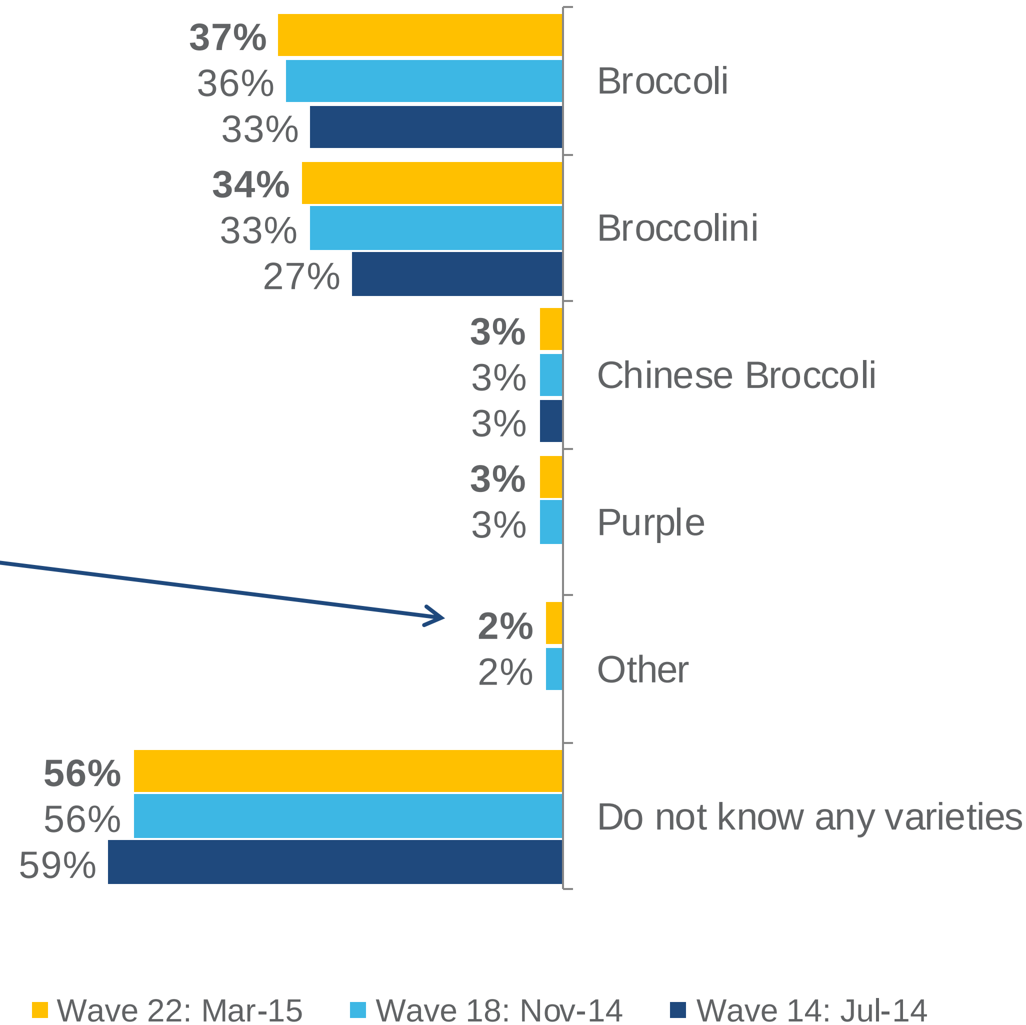
- The average price of broccoli was substantially higher than November 2014, with a national average of $4.65 per kg.
- There was price fluctuations between states and retailers, which is most likely due to promotional pricing in Melbourne and Brisbane.
- The lowest price was $2.48 per kilo and the highest price was $5.98per kg. The retail price range this wave was $3.50 per kg.

Pricing was carried out on 17th March 2015 between 10am-12pm.
Prices are displayed Online / In-store. **Green text indicates promotional price.**

There has been no change in the overall awareness of broccoli types.

Consumers recall generic names, such as ‘broccoli’, with very few consumers able to name specific types.

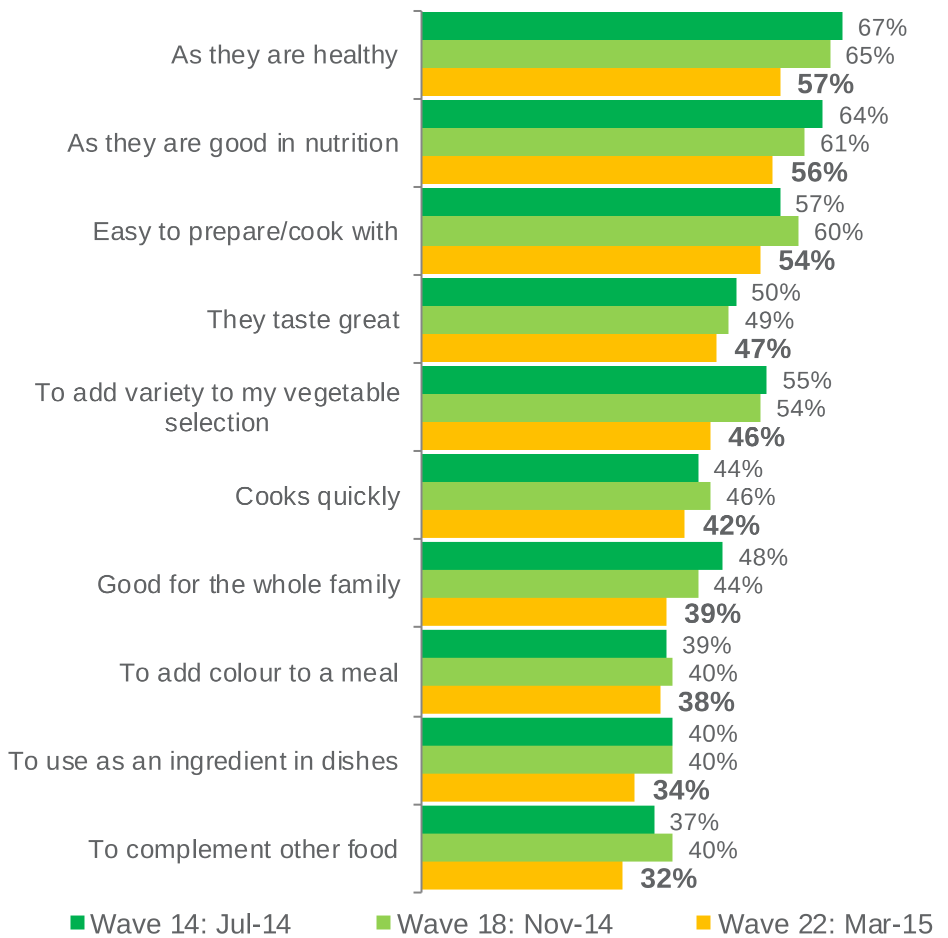
Other varieties recalled are Calabrese, Arcadia and Marathon.



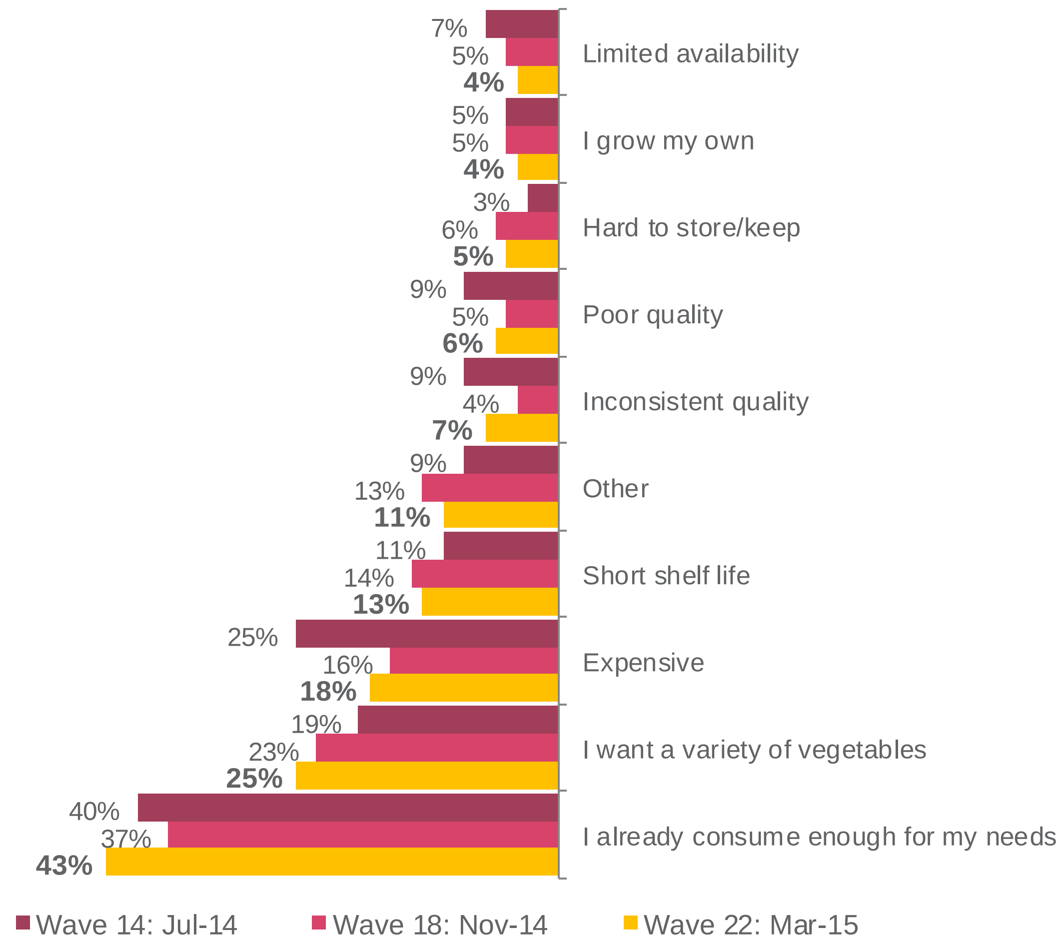
Q6a. What varieties of <commodity> are you aware of? (unprompted)
Sample: Wave 14 N=314, Wave 18 N=399, Wave 22 N=317

Health and nutrition remain the main influences on broccoli purchase. Consuming enough for their needs has increased as a barrier to purchase, as well as wanting a variety of vegetables in their diet.

Triggers



Barriers



Sample: Wave 14 N=314, Wave 18 N=399, Wave 22 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?

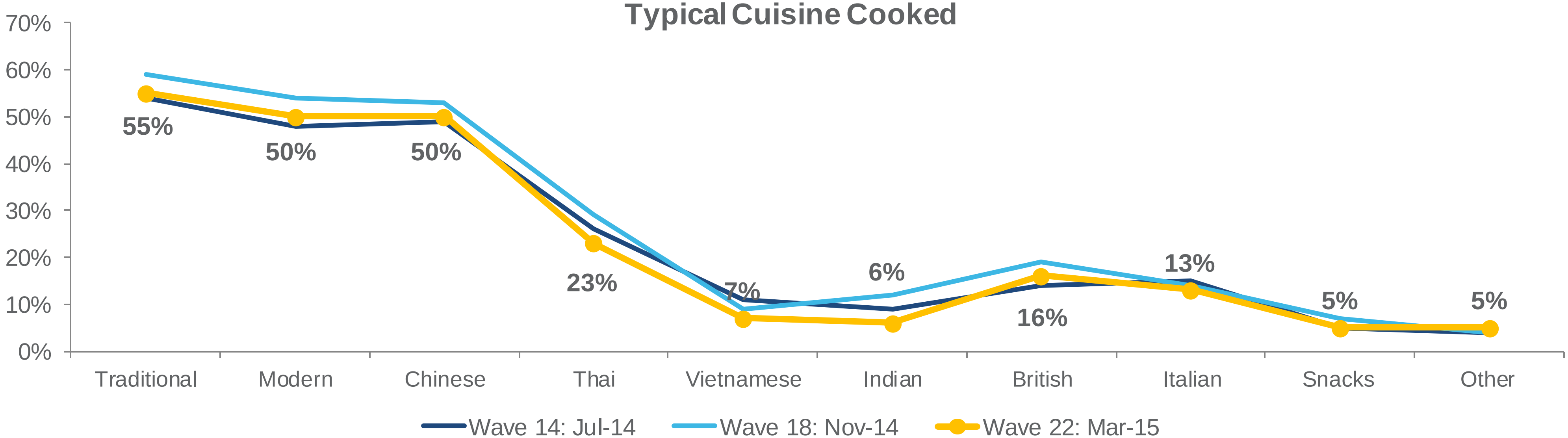
Weekday dinner has strengthened as the main meal occasion for broccoli consumption.

Australian and Chinese cuisine remain popular.

Top Consumption Occasions

	Wave 22	Wave 18	Wave 14
Weekday Dinner	**70%**	67%	65%
Weekend Dinner	**41%**	45%	43%
Family meals	**35%**	39%	39%
Everyday	**32%**	37%	33%
Quick Meals	**25%**	28%	27%

Typical Cuisine Cooked



Australian — Asian — European — Snacks

Sample: Wave 14 N=314, Wave 18 N=399, Wave 22 N=317
Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?

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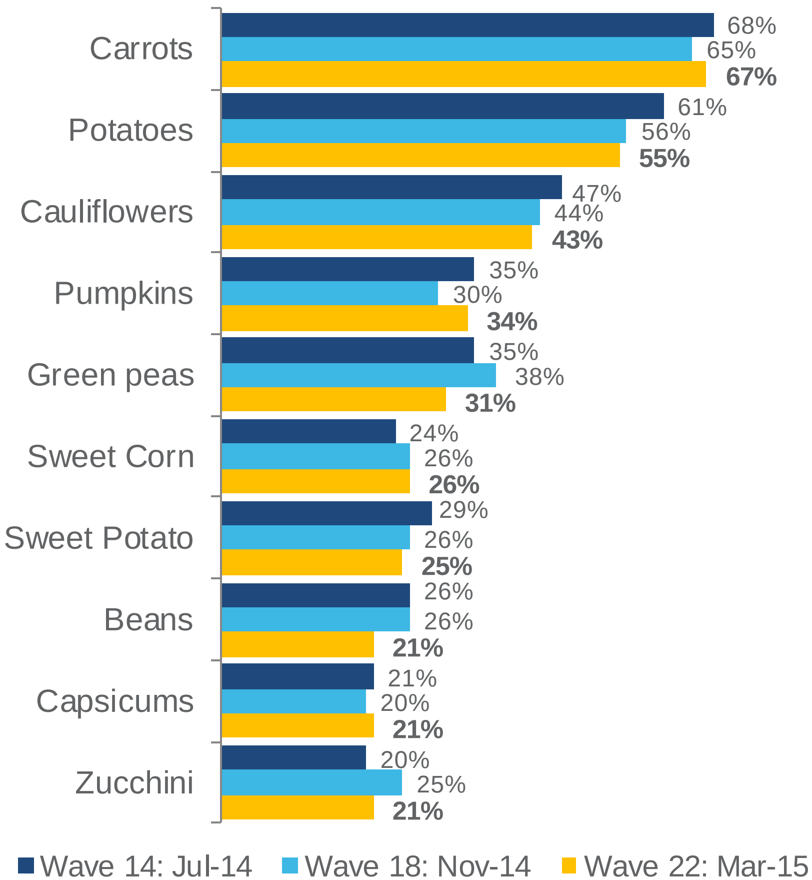
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Broccoli is generally steamed and stir-fried. Carrots, potatoes and cauliflowers are most likely to be served in combination with broccoli.

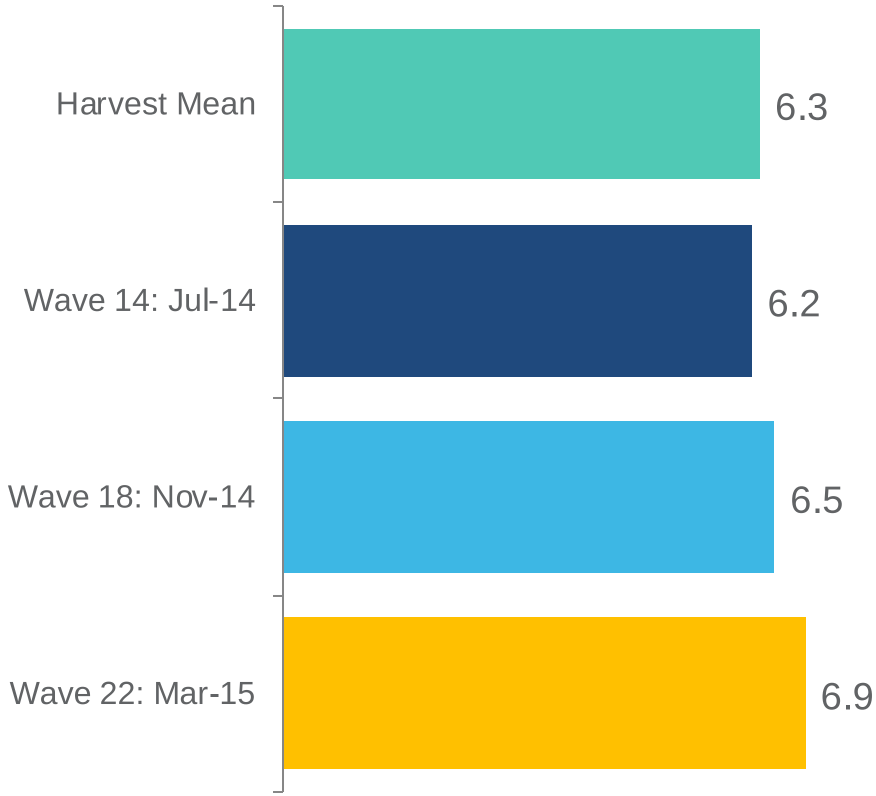
Top 10 Accompanying Vegetables



Top 10 Cooking Styles			
	Wave 14	Wave 18	Wave 22
Steaming	65%	65%	62%
Stir frying	50%	48%	49%
Boiling	32%	33%	36%
Microwave	29%	31%	28%
Blanche	10%	13%	12%
Soup	16%	13%	12%
Raw	11%	9%	9%
Stewing	9%	7%	9%
Sautéing	9%	8%	6%
Roasting	5%	5%	4%

Sample: Wave 14 N=314, Wave 18 N=399, Wave 22 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 has increased across the three waves, and is sitting well above the Harvest Mean, the average of all commodities. The increase is likely due to the media coverage of Australian grown produce.



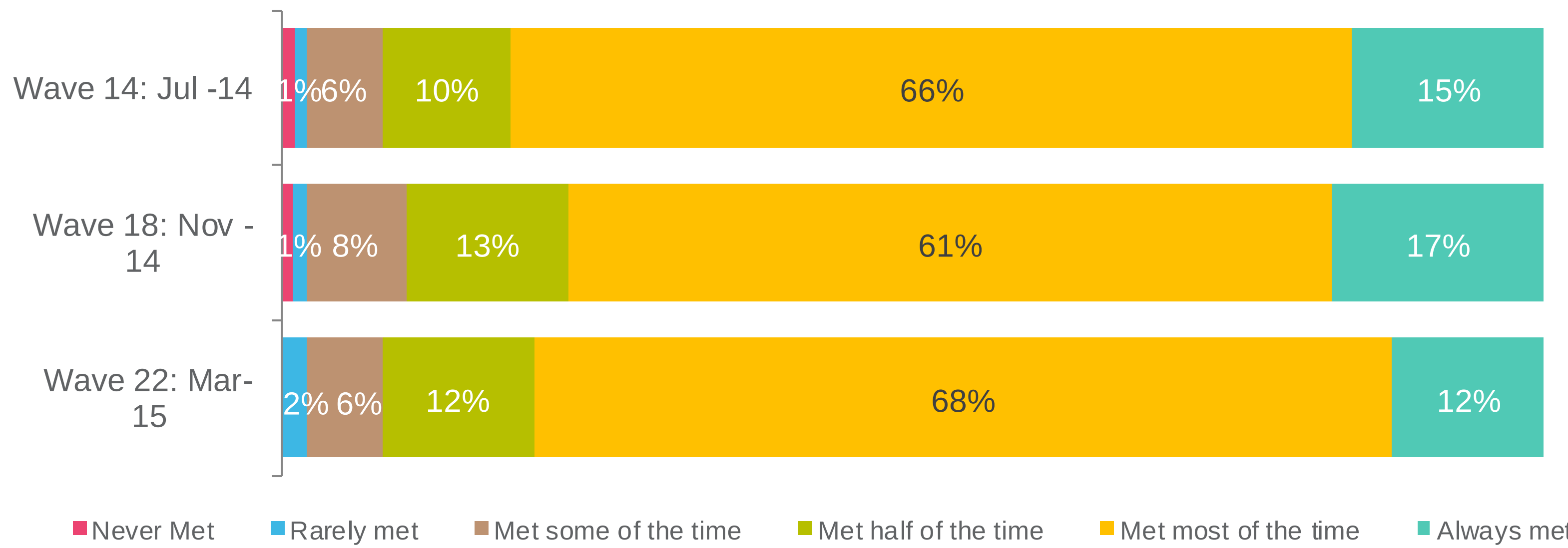
Q14. When purchasing <commodity>, how important is Provenance to you?
Sample: Wave 14 N=314, Wave 18 N=399, Wave 22 N=317

Whilst the length of time it was expected broccoli to stay fresh remained stable, meeting this expectation fell this month, with only a small number of consumers indicating freshness expectations are always met.

Expected to stay fresh for **7.2** days

▲ 7.3 days, Wave 14
▼ 7.1 days, Wave 18

Expectations Met



Sample: Wave 14 N=314, Wave 18 N=399, Wave 22 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> ?

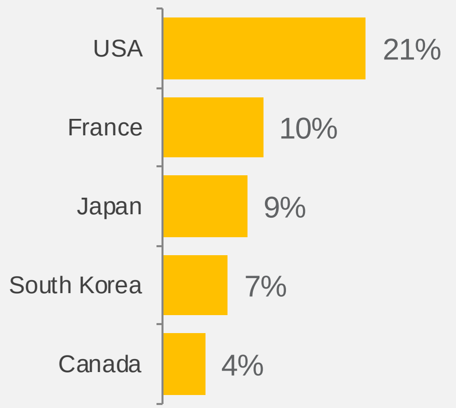
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Trends: Broccoli

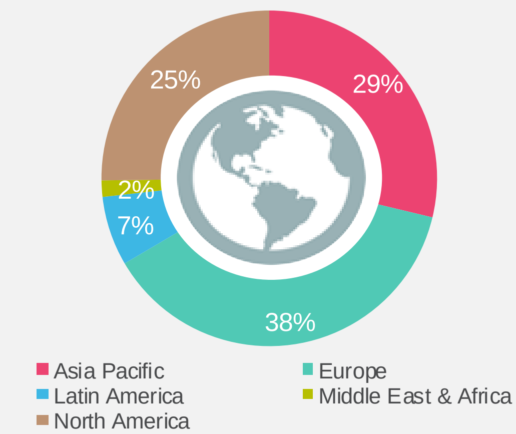
Broccoli Global Launches
January – March 2015

There were 254 new broccoli products launched globally over the last 3 months. Top categories for launch were fruit and vegetables, and meals. These launches occurred primarily across Asia Pacific, Europe and North America.

Country

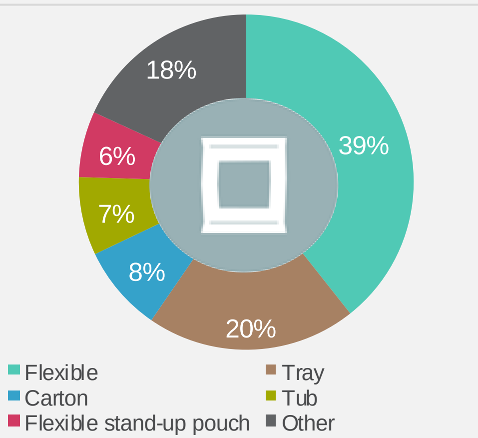


Region



254 Global NPDs

Top Pack Formats



Categories

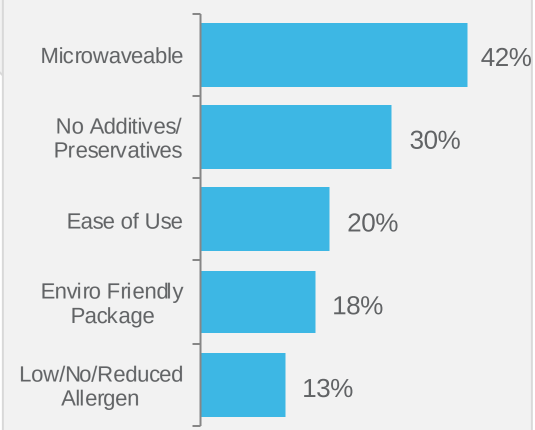
Fruits & Vegetables 28%

Meals 26%

Snacks 8%

Baby Food 6%

Top Claims



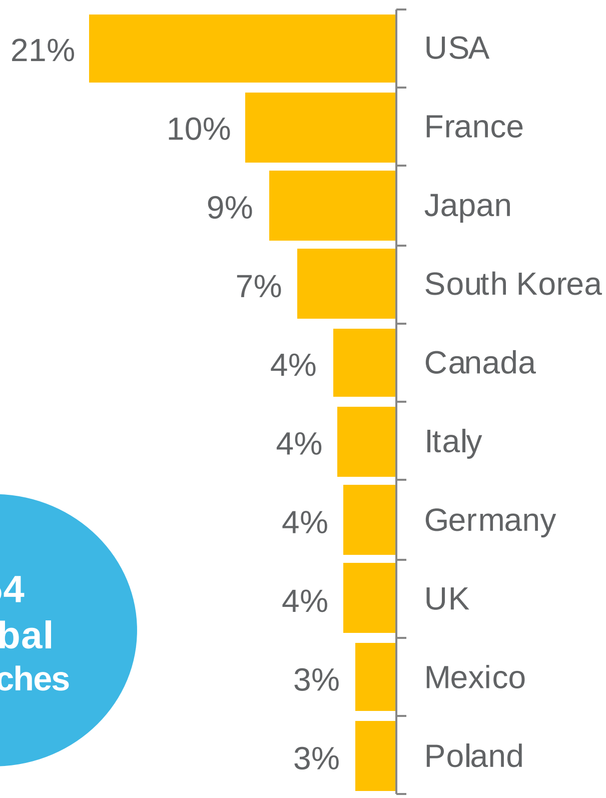
Broccoli Product Launches:
Last 3 Months (January – March 2015)
Summary

- A total of 254 products containing broccoli as an ingredient were launched globally within the last 3 months, which is slightly down on past trends.
- There were 3 products containing broccoli launched in Australia in the past 3 months (see upcoming slide for more detail).
- Europe (38%), Asia Pacific (29%) and North America (25%) remain the top regions for broccoli product launches.
- Flexible pack formats (39%) are the predominant form of packaging for launches in the last 3 months. This is consistent with all previous waves tracked.
- The top categories for launches were fruit and vegetable products (28%), meals (26%) and snacks (8%).
- The core claims used for launches centred around convenience and health, with microwaveable being the top claim (42%), no additives or preservatives (30%) and ease of use (20%).
- The most innovative launches found are broccoli chips and baby food starter packs with broccoli puree (see upcoming slides for more detail).

Source: Mintel (2015)

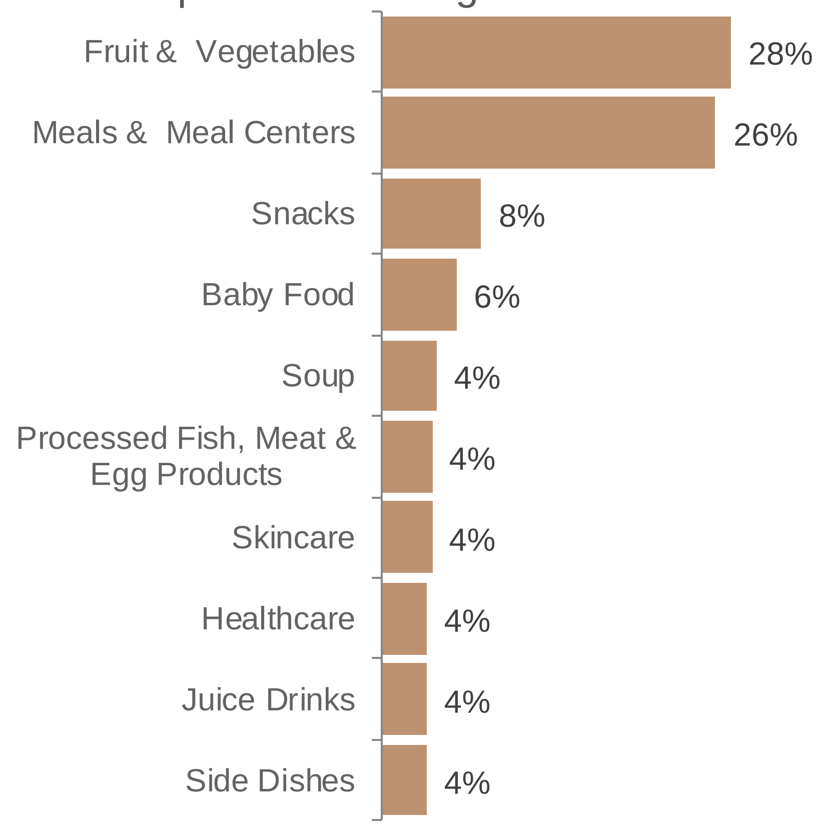
USA is the dominant country for broccoli product launches, followed by France & Japan. Fruit & vegetables, meals and snacks are the main product categories, with juice drinks launches less common in Wave 22.

Top Launch Countries

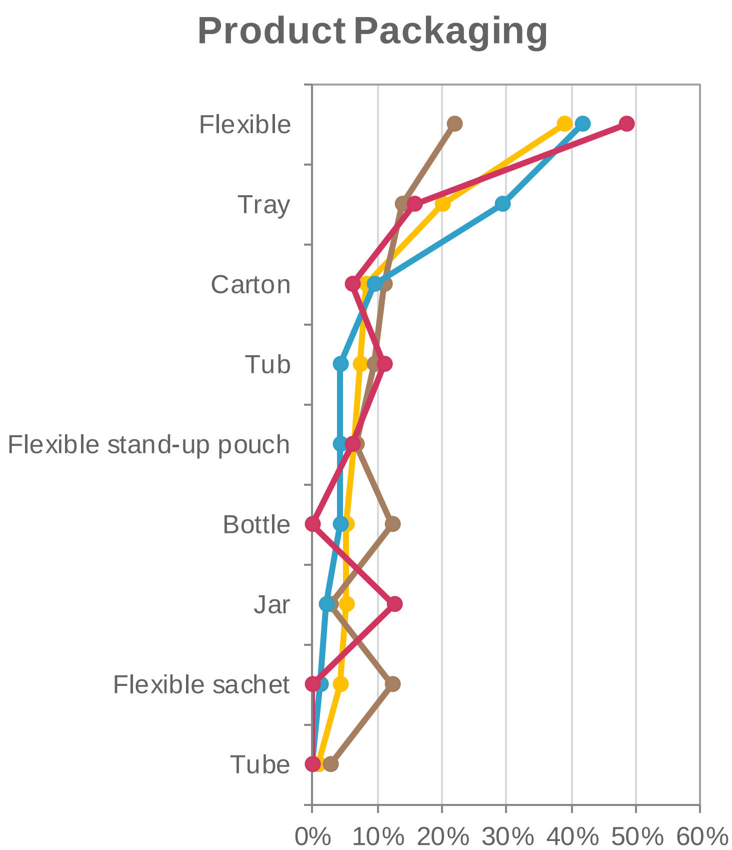


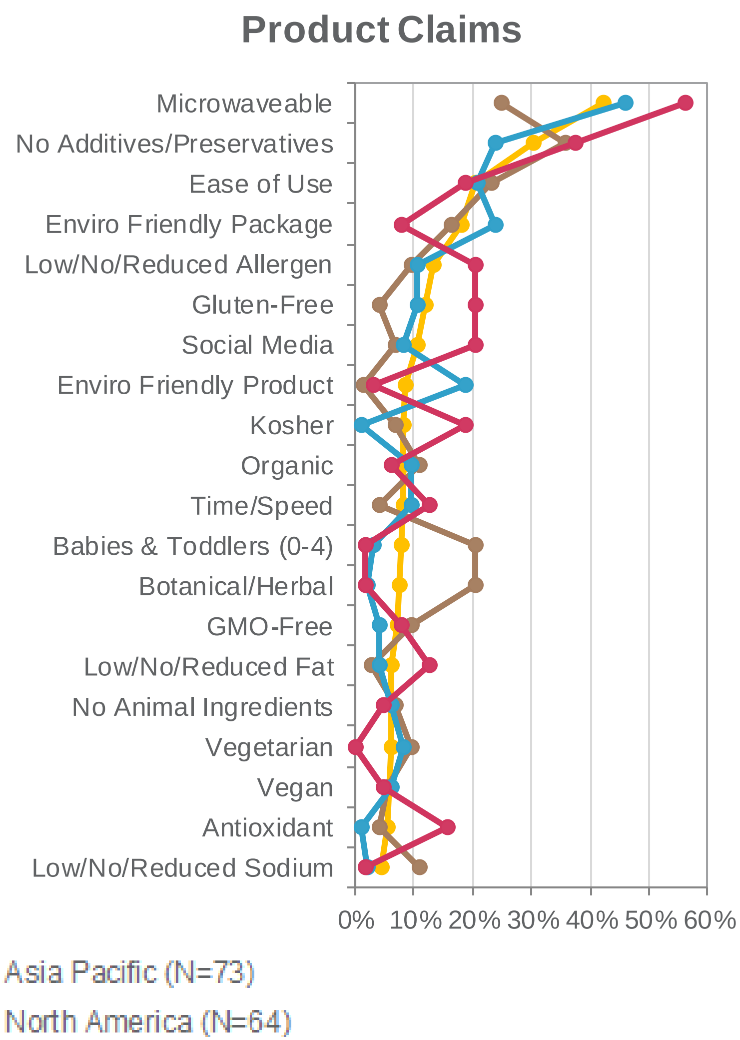
254 Global Launches

Top Launch Categories



microwaveable is the most used claim on broccoli products, indicating convenience-based products. Flexible packaging is utilised across regions, however trays appear most popular in Europe.





Only regions with n >30 are displayed

Innovative Broccoli Launches:
L3M (January – March 2015)

Greenday Broccoli Chips (Thailand)

Greenday Broccoli Chips have been repackaged in a newly designed pack. These healthy vacuum fried broccoli chips are made from real vegetable and contain no added sugar, preservatives or gluten. They are said to be fun to eat and can be enjoyed anywhere and anytime. The vegetarian product is suitable for children from 12 months onwards and retails in a 36g pouch, containing four bags and bearing the Facebook logo.

Claims:
No Additives/Preservatives, Low/No/Reduced Allergen, On-the-Go, Low/No/Reduced Sugar, Gluten-Free, Social Media, Vegetarian, Babies & Toddlers (0-4), Children (5-12)

Ready Pac Bistro Bowl Kale Apple Veggie Chopped Salad (USA)

Ready Pac Bistro Bowl Kale Apple Veggie Chopped Salad comprises kale, broccoli, red cabbage, carrots, radicchio, lite lemon poppy seed dressing, apples, celery, dried cranberries and sunflower seeds. The product contains 240 calories per bowl and retails in a 5.5-oz. pack, with a fork inside.

Claims:
NA

Buavita Royale Chloro Broccoli Fruit & Veggies Enhanced Juice Drink (Indonesia)

Buavita Royale Minuman Sari Buah dan Sayuran Campuran Pir, Melon, Jeruk, dan Brokoli (Chloro Broccoli Fruit & Veggies Enhanced Juice Drink) is described as a mixture of pear, melon, orange, and broccoli juice enriched with calcium which is good for the formation of bones and teeth density. This halal certified product retails in a FSC certified 250ml pack.

Claims:
Vitamin/Mineral Fortified, Added Calcium, Other (Functional), Ethical - Environmentally Friendly Package, Halal, Bone Health

Raviollo Breaded Broccoli (Russia)

Raviollo Brokkoli v Khrustyashchikh Sukharikakh (Breaded Broccoli) is now available in a new 320g pack. The vegetarian product is made from selected vegetables and provides only 87 calories. It is free from GMO and ready to eat and can be heated in a microwave. According to the manufacturer, broccoli contains fibre, potassium, phosphorus, calcium, magnesium, iron, zinc, manganese, sulphur and vitamins C, B1, B2, B5, B6, PP, E, K and pro-vitamin A.

Claims:
Ease of Use, Vegetarian, GMO-Free, Low/No/Reduced Calorie, Microwaveable

Source: Mintel (2015)

Innovative Broccoli Launches:
L3M (January – March 2015)

Delicieux Burgundian Vegetable Mix (Netherlands)

Delicieux Groentemix Bourgondisch (Burgundian Vegetable Mix) consists of pea pods, asparagus tips and sugared cranberries. The premium product retails in a 400g pack.

Claims:
Premium

Tesco Finest Broccoli & Peanut Salad (UK)

Tesco Finest Broccoli & Peanut Salad contains cooked wheatberries with roasted and salted peanuts and broccoli in a rice wine vinegar dressing. This vegetarian product retails in a 210g pack.

Claims:
Vegetarian, Premium

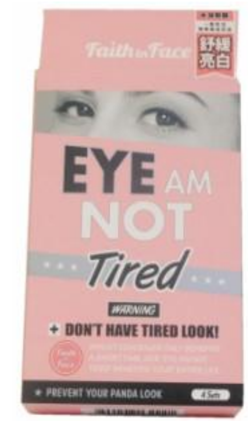
Woolworths Food Ready to Micro Broccoli, Butternut & Courgette with Cheese Sauce (South Africa)

Woolworths Food Ready to Micro Broccoli, Butternut & Courgette with Cheese Sauce is suitable for vegetarians. This low-fat product can be microwaved for eight to nine minutes and retails in an 800g pack.

Claims:
Ease of Use, Vegetarian, Low/No/Reduced Fat, Microwaveable

Faith in Face Eye Am Not Tired Eye Masks (Taiwan)

Faith in Face Eye Am Not Tired Eye Masks are formulated with eye bright grass, broccoli extract and walnut extract. They are claimed to help soothe and tighten skin around eyes, preventing tired and panda look. This product retails in a pack containing four 3g masks.



Claims:
Botanical/Herbal

Source: Mintel (2015)

Innovative Broccoli Launches:

L3M (January – March 2015)

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)

M&M Meat Shops Broccoli & Beef (Canada)

M&M Meat Shops Broccoli and Beef is now available with a new recipe. The microwaveable product comprises seasoned beef strips with broccoli and red bell peppers in a savoury hoisin sauce. It retails in a 400g pack featuring cooking instructions.

Claims:
Microwaveable

Plum Organics Stage 2 Broccoli & Apple Organic Baby Food (Hong Kong)

Plum Organics Stage 2 Broccoli & Apple Organic Baby Food is suitable for babies from the age of six months and onwards. This unsweetened and unsalted food is free from GMO and artificial ingredients and can be squeeze and serve right out of the pouch. This USDA organic and kosher certified product retails in a 113g BPA-free pouch.

Claims:
All Natural Product, GMO-Free, Kosher, Ease of Use, Organic, Low/No/Reduced Sodium, Babies & Toddlers (0-4)

Organic Broccoli Soup with Buckwheat & Coriander (France)

Lima Saveur Maison Velouté de Brocolis au Sarasin et Coriandre (Organic Broccoli Soup with Buckwheat & Coriander) is now available. This certified organic product is a good source of vegetables protein, rich in fibres, free from fat, ready to heat and suitable for vegans. It retails in a 1L pack bearing the FSC logo.

Claims:
High/Added Fiber, Vegan, Ethical - Environmentally Friendly Package, Low/No/Reduced Fat, Ease of Use, Organic, No Animal Ingredients

Source: Mintel (2015)

Australian Broccoli Launches:
L3M (January – March 2015)

Birds Eye Stir Fry Frozen Supreme Stir Fry Vegetables

Birds Eye Stir Fry Frozen Supreme Stir Fry Vegetables have been repackaged, and are now available in a newly designed 850g value, resealable pack. This microwaveable product is a source of folate and vitamin C. It is free from added preservatives, flavours or colours, and is naturally low in fat and sodium, and high in fibre. The product contains carrot, green beans, broccoli, cauliflower, baby corn, pineapple and capsicum.

Claims:
No Additives/Preservatives, High/Added Fiber, Low/No/Reduced Fat, Microwaveable, Ease of Use, Low/No/Reduced Sodium, Economy

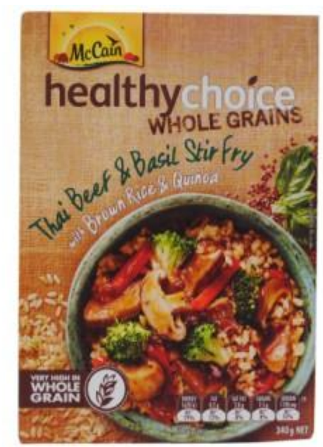
Colonial Farm Vegetable Patties with Quinoa

Colonial Farm Vegetable Patties with Quinoa are described as a wholesome combination of selected vegetables, cannellini beans and quinoa. The meat-free product is suitable for vegetarians and contains no palm oil, artificial colours or flavours. It can be ready in the oven in 20 minutes and retails in a recyclable 200g pack that provides two servings.

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

McCain Healthy Choice Wholegrains Thai Beef & Basil Stir Fry

McCain Healthy Choice Wholegrains Thai Beef & Basil Stir Fry with Brown Rice & Quinoa is described as tender strips of beef mixed with broccoli, shiitake mushrooms and capsicum, lightly seasoned with Thai basil, and served on a bed of fluffy brown rice and red quinoa. It is very high in wholegrain, 97% fat free and contains one serve of vegetables and 65g of wholegrain. This microwaveable product retails in a 340g pack.



Claims:
Wholegrain, Low/No/Reduced Fat, Microwaveable

Chillies.

Purchase and consumption frequency remain high and stable across waves.

There has been an increase in purchase from independent retail channels, including markets.

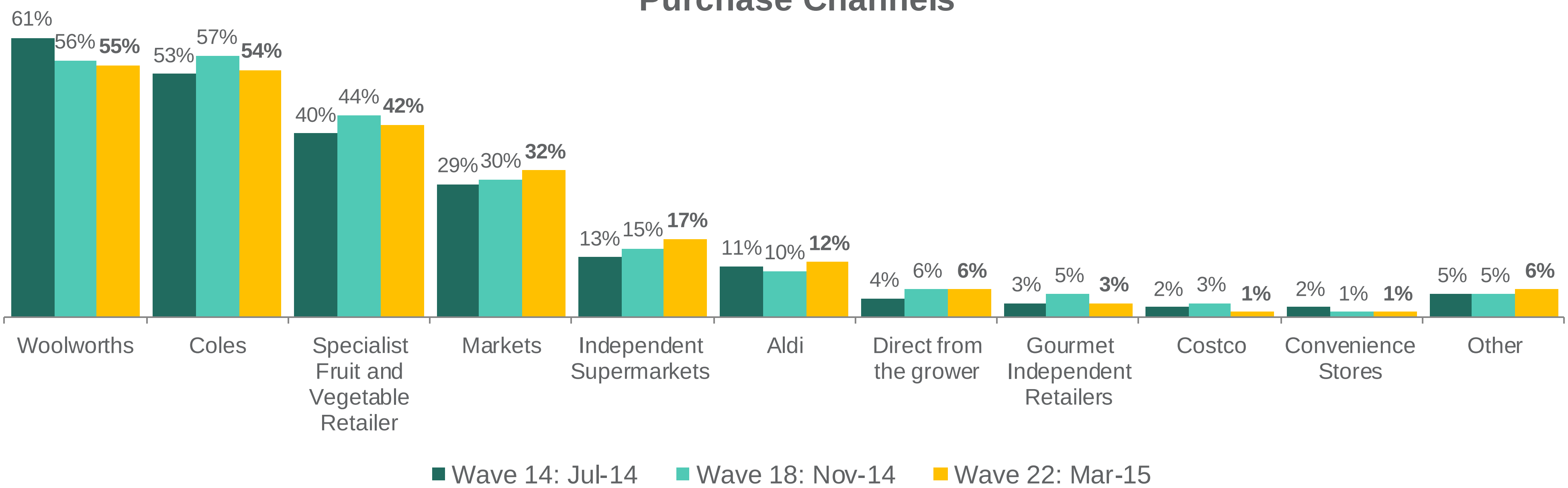
Average Purchase **4.0** times per month

▼ 3.6 times, Wave 14
— 4.0 times, Wave 18

Average Consumption **12.4** times per month

▼ 12.0 times, Wave 14
▲ 13.0 times, Wave 18

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 14 N=261, Wave 18 N=215, Wave 22 N=253

Average Spend and Price Sensitivity

Average weight of purchase

The typical consumer purchases **300g** of chillies, consistent with all previous waves.

– 300g, Wave 14
– 300g, Wave 18

Recalled last spend

Recalled last spend on chilli purchase was **$4.00,** levelling out the low in July and the high in November 2014.

▼ $3.70, Wave 14
▲ $4.60, Wave 18

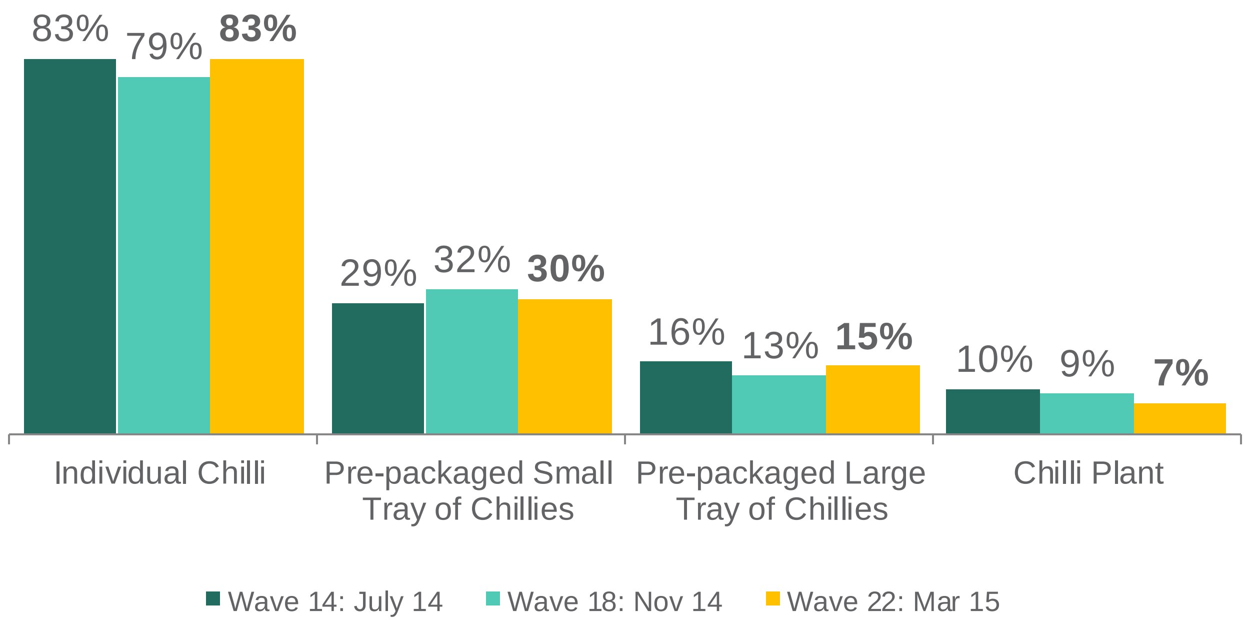
Value for money

Consumers' perceived value for money was relatively fair **(6.2/10)**, in line with past trends.

▼ 6.1/10, Wave 14
▲ 6.3/10, Wave 18

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 14 N=261, Wave 18 N=215, Wave 22 N=253

Individual chillies are the main format purchased, consumers typically purchase 5-6 per shop.

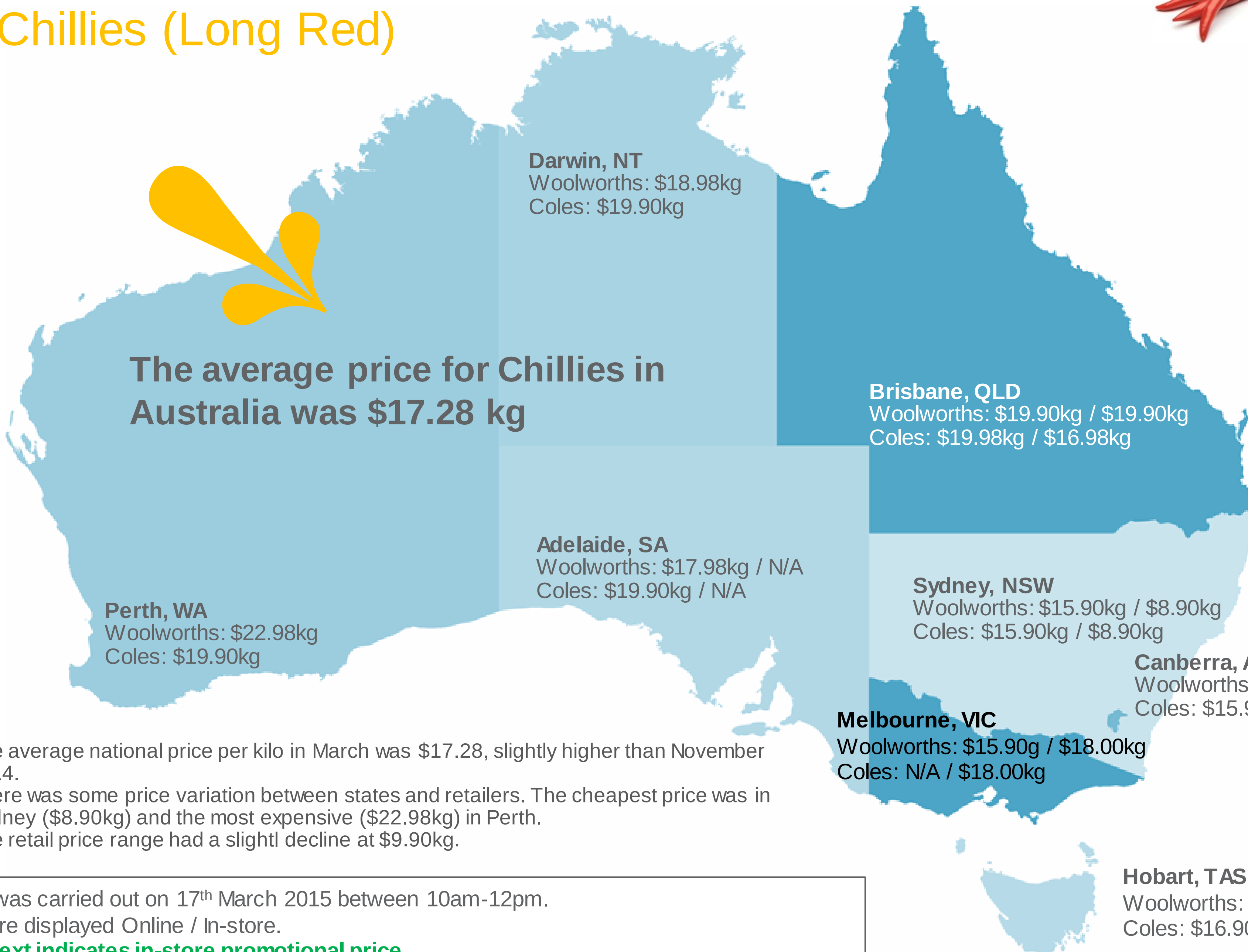


Average Amount Purchased	Individual	Pre-packaged Small Tray	Pre-packaged Small Tray	Chilli Plant
Wave 14: July-14	5.8	1.8	1.8	2.1
Wave 18: Nov-14	5.4	1.5	2.0	1.7
Wave 22: Mar-15	6.2	1.3	1.7	2.9

Q3a. How much <commodity> does this typically equate to?
Sample Wave 14 N=261, Wave 18 N=215, Wave 22 N=253

Online and In-store Commodity Prices

Chillies (Long Red)

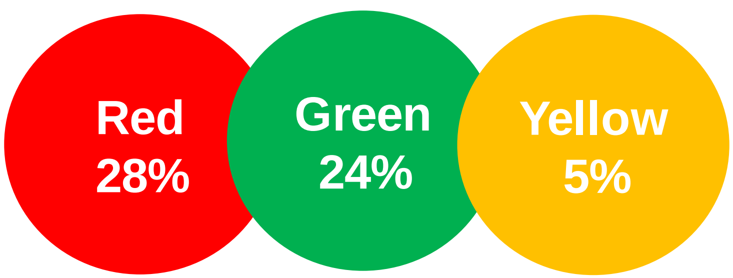


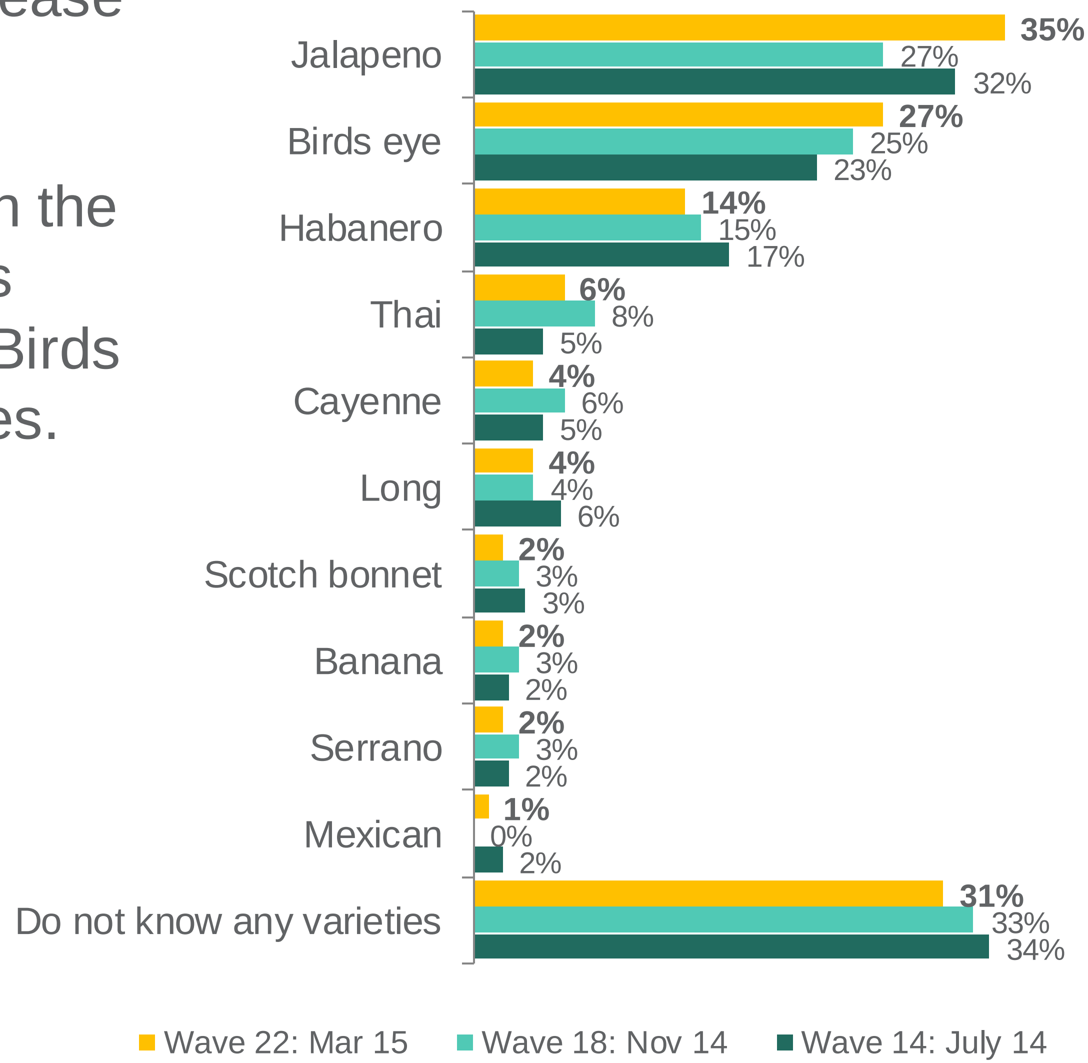
- The average national price per kilo in March was $17.28, slightly higher than November 2014.
- There was some price variation between states and retailers. The cheapest price was in Sydney ($8.90kg) and the most expensive ($22.98kg) in Perth.
- The retail price range had a slightl decline at $9.90kg.

Pricing was carried out on 17th March 2015 between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates in-store promotional price.

There has been a gradual increase in awareness of chilli types.

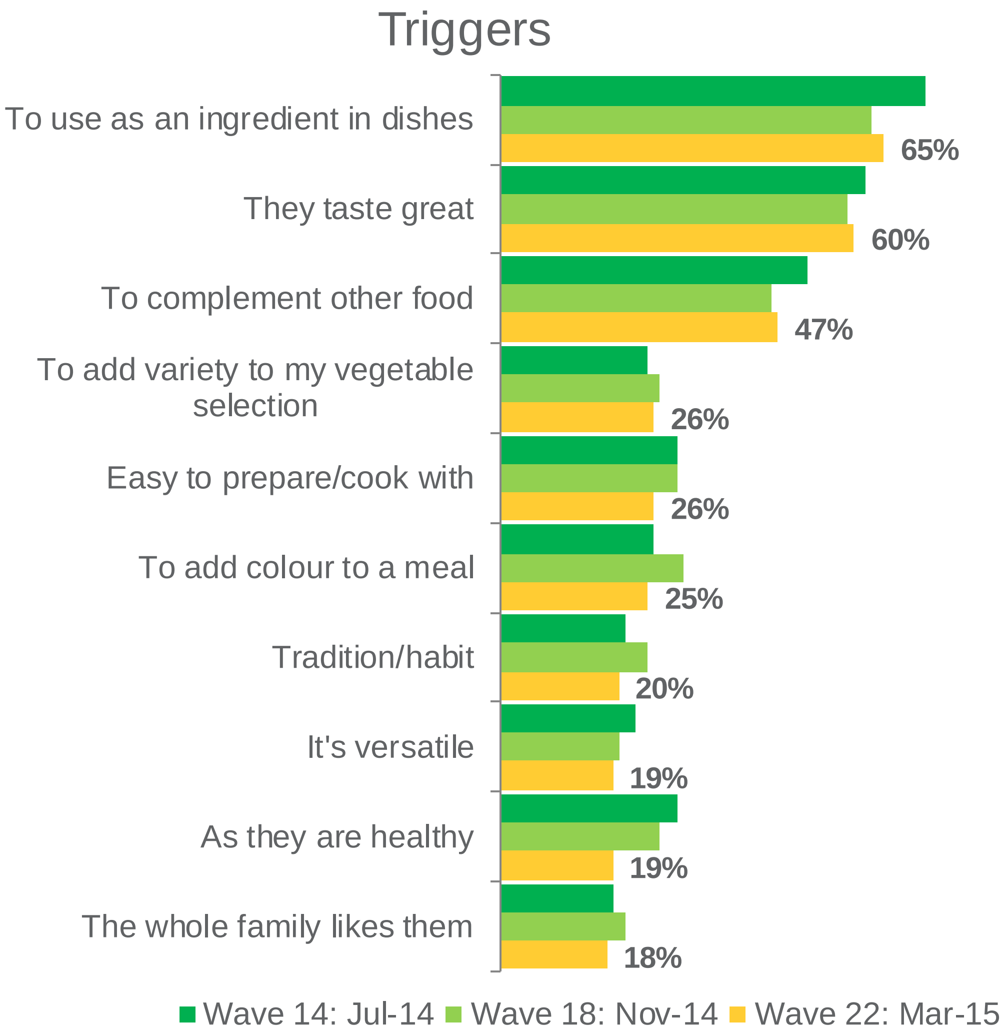
Jalapeno and Birds eye remain the most recalled types. There has been a consistent increase in Birds eye awareness over past waves.

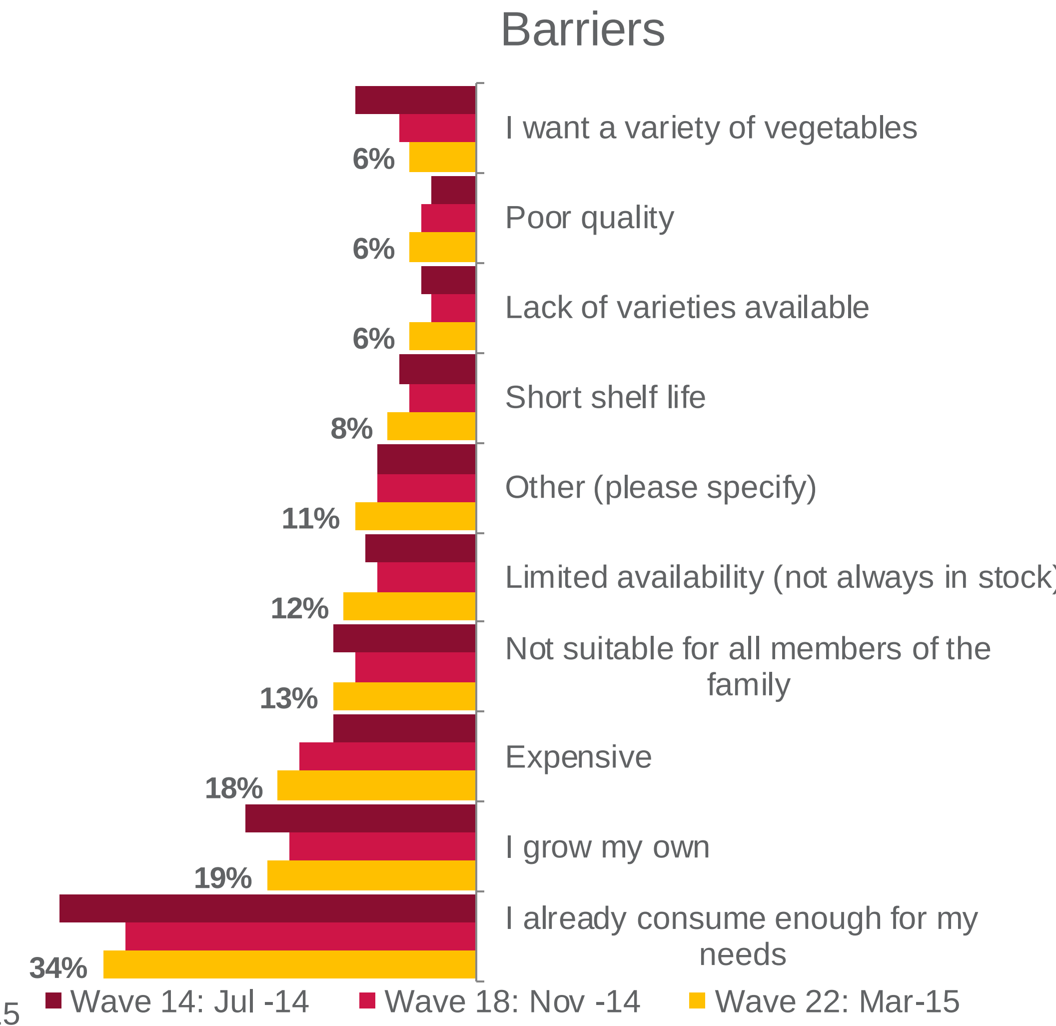




Q6a. What types/varieties of <commodity> are you aware of? (unprompted)
Sample Wave 14 N=261, Wave 18 N=215, Wave 22 N=253

Three key triggers are driving chilli purchase: using as an ingredient, taste and complementing other food. Consuming enough for their needs remains the main barrier to purchase. There has been a consistent increase in expense as a barrier to purchase.





Sample Wave 14 N=261, Wave 18 N=215, Wave 22 N=253
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?

Horticulture Innovation Australia

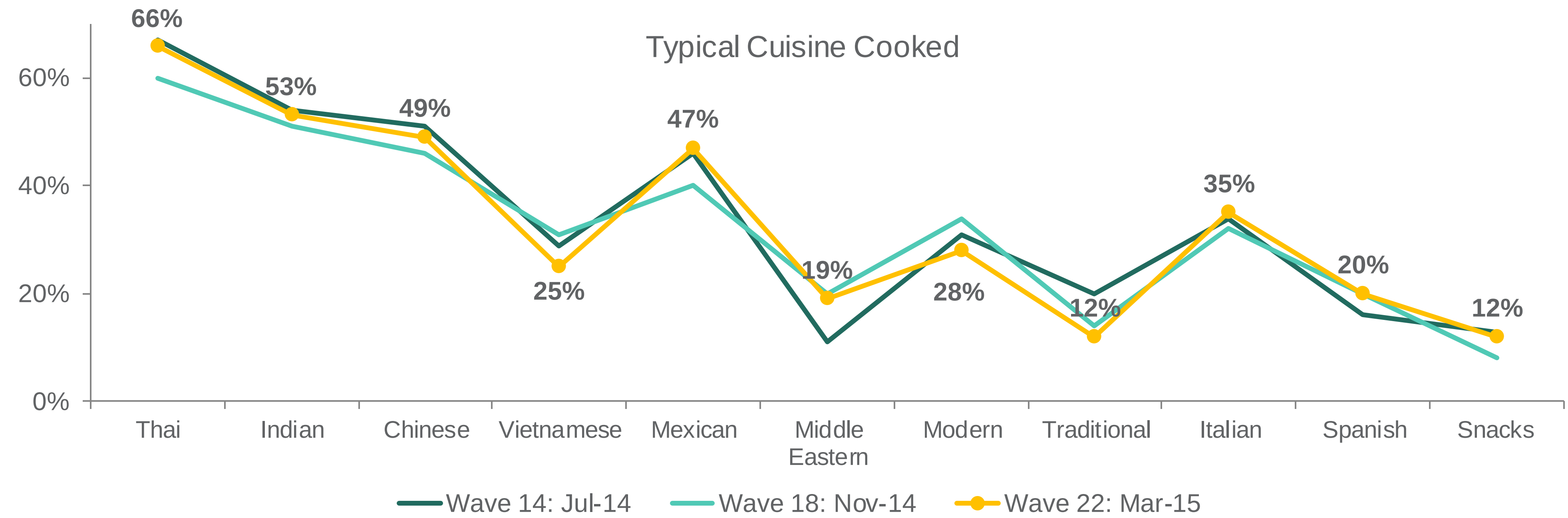
colmar brunton.

Asian and Mexican cuisine are popular cooking styles with chilli.

Consumers are typically eating chillies for dinner meals.

Top Consumption Occasions

	Wave 22	Wave 18	Wave 14
Weekday Dinner	**54%**	47%	57%
Weekend Dinner	**46%**	38%	51%
Every-day	**41%**	42%	36%
Family meals	**32%**	31%	34%
Quick Meals	**30%**	32%	27%

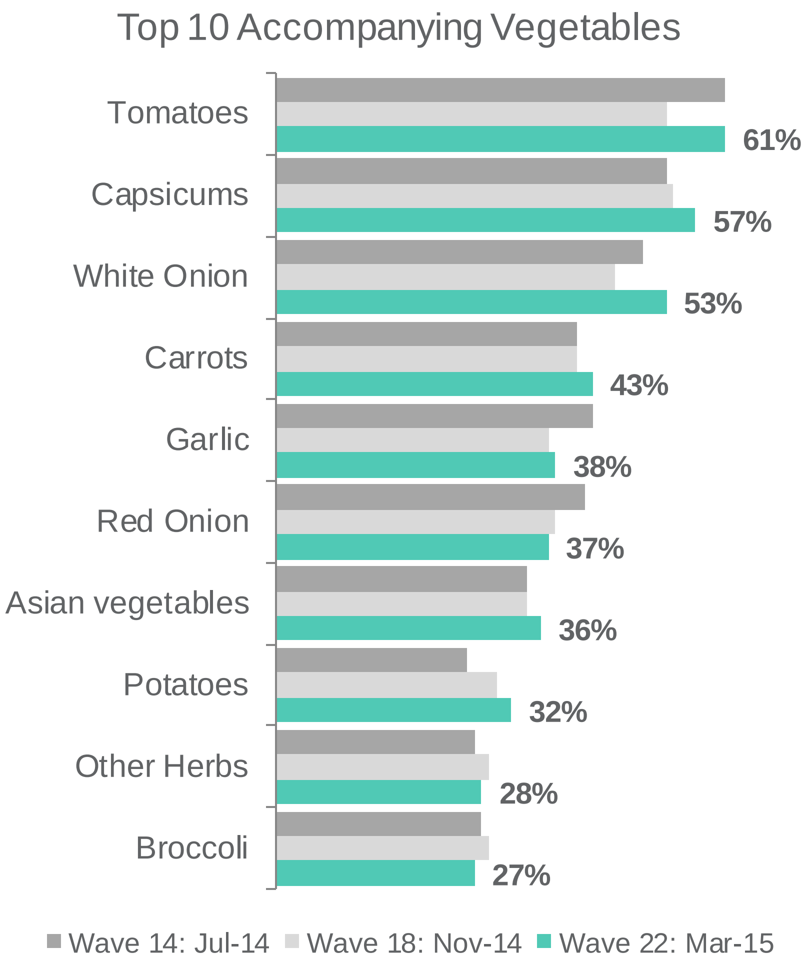


Asian → ← Other → ← Australian → ← Other →

Sample Wave 14 N=261, Wave 18 N=215, Wave 22 N=253
Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?

Capsicums are increasingly likely to be served with chillies, as well as tomatoes and onions.

Consumers prefer to stir-fry chillies, whilst sautéing and stewing are also common cooking styles.



Top 10 Cooking Styles			
	Wave 14	Wave 18	Wave 22
Stir frying	72%	70%	75%
Sautéing	34%	32%	32%
Stewing	28%	32%	29%
Soup	32%	26%	29%
Raw	29%	31%	24%
Mince	26%	20%	22%
Shallow Frying	23%	24%	21%
Blend	19%	18%	17%
Roasting	13%	20%	16%
Grilling	11%	19%	13%

Sample Wave 14 N=261, Wave 18 N=215, Wave 22 N=253
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?

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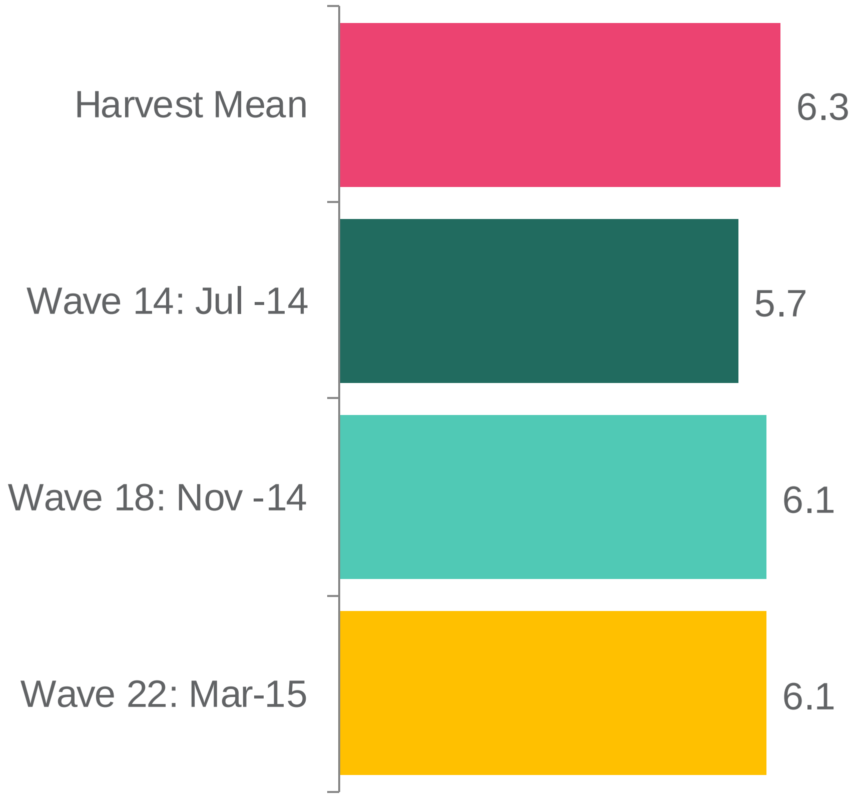
Importance of provenance has remained stable between waves, and is still lower than the Harvest Mean. This may be because consumers only purchase a small amount of chillies per shop, and buy less frequently compared with other vegetables. It may also be because consumers consider them an exotic ingredient likely to be grown overseas, making the provenance of chillies less important.



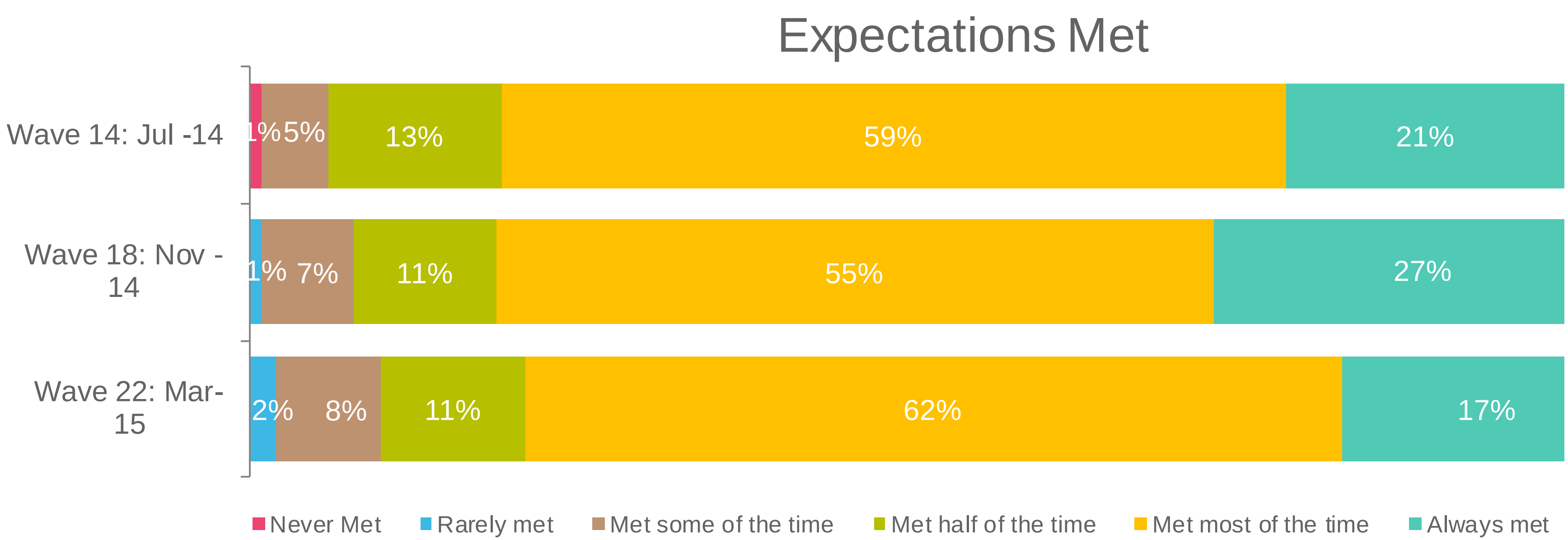
Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 14 N=261, Wave 18 N=215, Wave 22 N=253

Longevity and expectations of freshness both fell this month.

However, the expected shelf life of chillies remains over 10 days, which is quite substantial comparative to other commodities.

Expected to stay fresh for **11.4** days

▲ 12.3 days, Wave 14
▲ 11.7 days, Wave 18



Sample Wave 14 N=261, Wave 18 N=215, Wave 22 N=253
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> ?

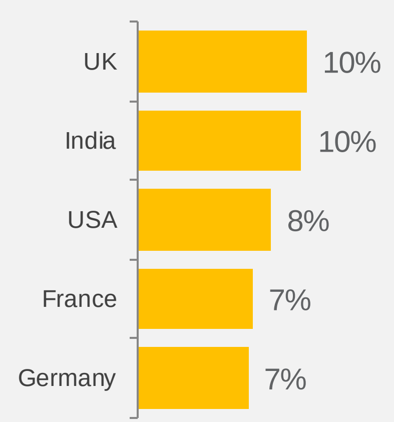
Trends: Chillies

Chilli Global Launches

January – March 2015

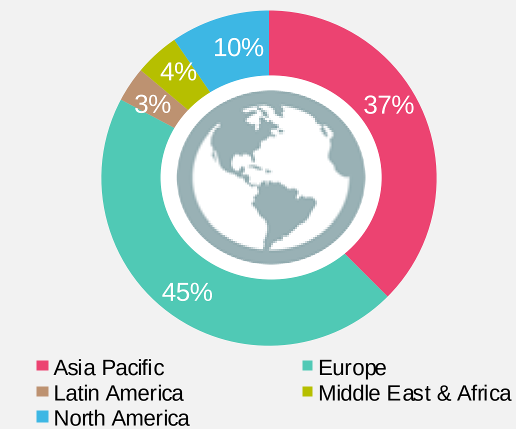
There were 1067 new products launched in the last 3 months that contained chilli as an ingredient. The majority of these launches were in the Europe and Asia Pacific regions. The top category products it launched in were sauces & seasonings and meals.

Country

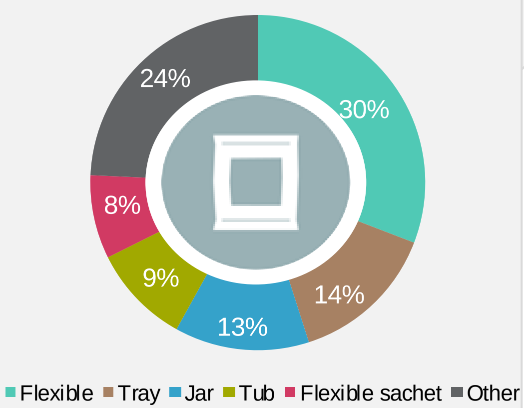


1067 Global NPDs

Region



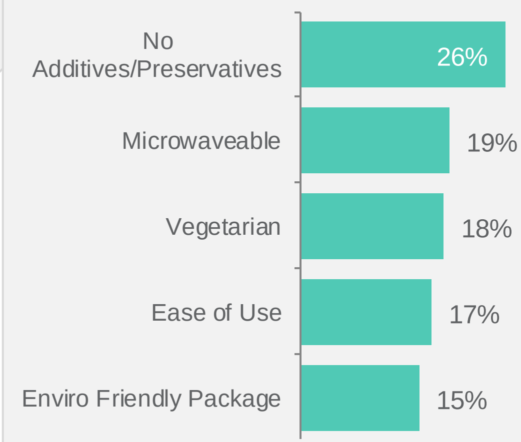
Top Pack Formats



Categories

- Sauces & Seasoning 32%
- Meals 25%
- Snacks 17%
- Processed Products 12%

Top Claims



Chilli Product Launches:
Last 3 Months (January – March 2015)
Summary

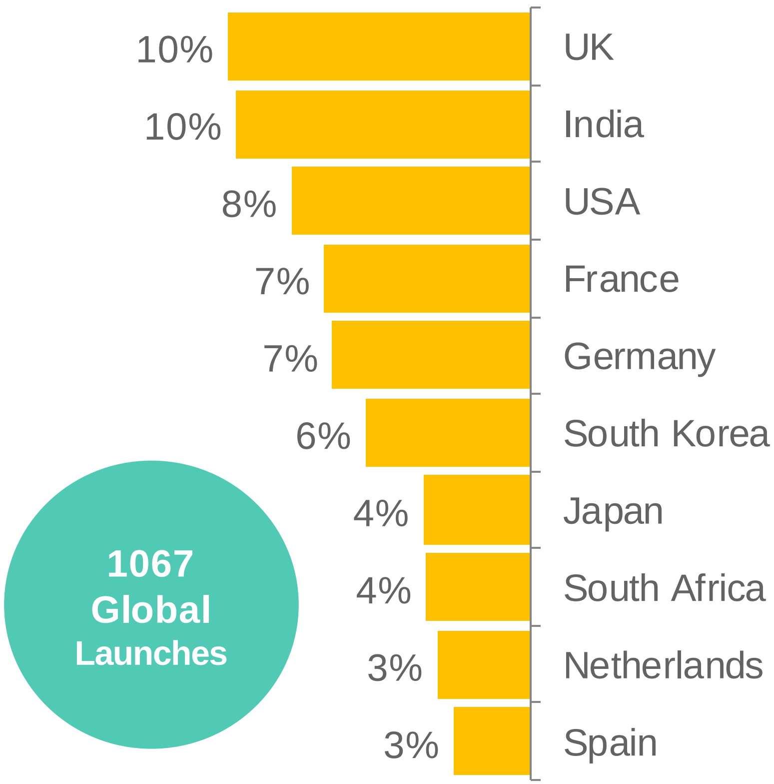
- A total of 1067 products that contained chilli as an ingredient have been launched globally in the last 3 months.
- There were 17 chilli products launched in Australia – a return to consistent levels after a peak in Wave 18.
- The two main regions for launches are Europe (45%) and Asia Pacific (37%), consistent with the last trends analysis.
- Flexible packaging (30%) and trays (14%) are the main formats used for launches over the past three months.
- Top categories for launches are sauces and seasoning (32%) and meals (25%).
- The key claims used are no additives/preservatives (26%) and microwaveable (19%).
- The most innovative product is a Mexican-inspired Michelada from the USA – a mix of chilli, spices and lemon to add to beer (see upcoming slides for more details).

Source: Mintel (2015)

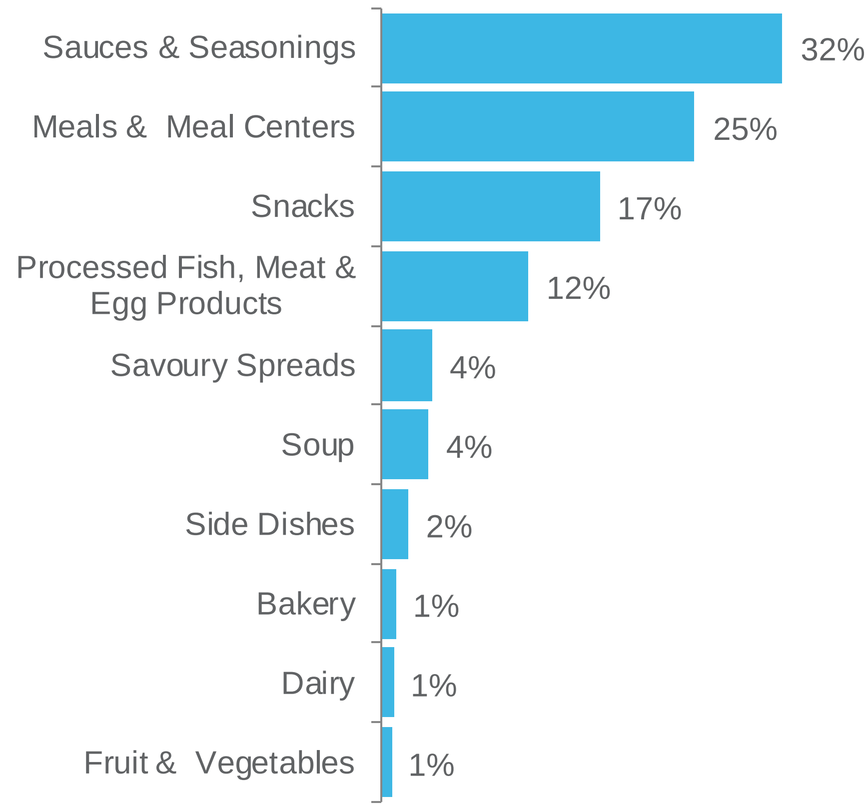
The UK and India have the greatest number of launches over the past three months.

The majority of products are launched as sauces and seasonings or meals.

Top Launch Countries



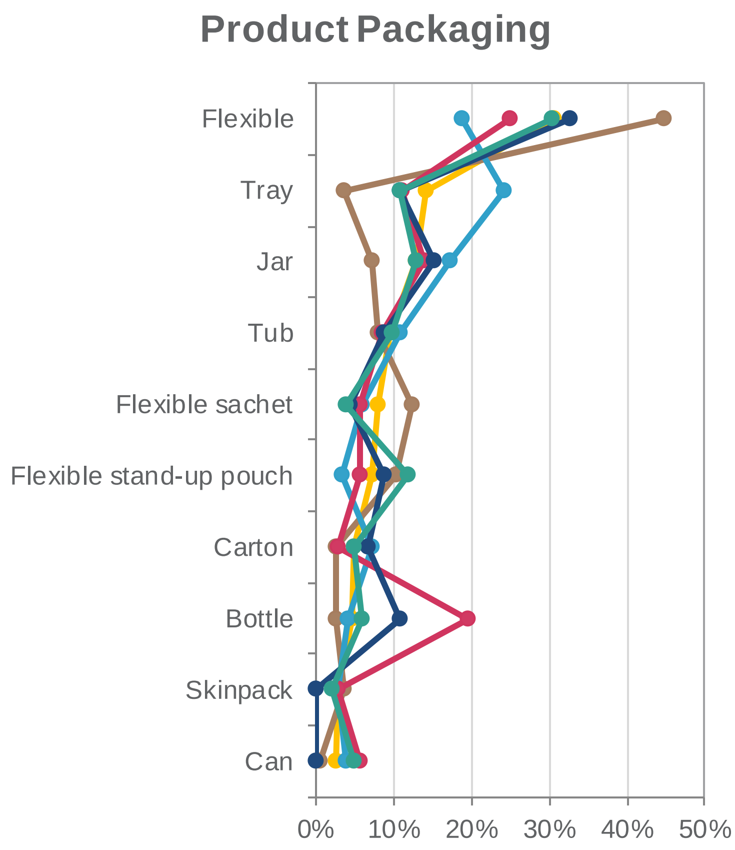
Top Launch Categories

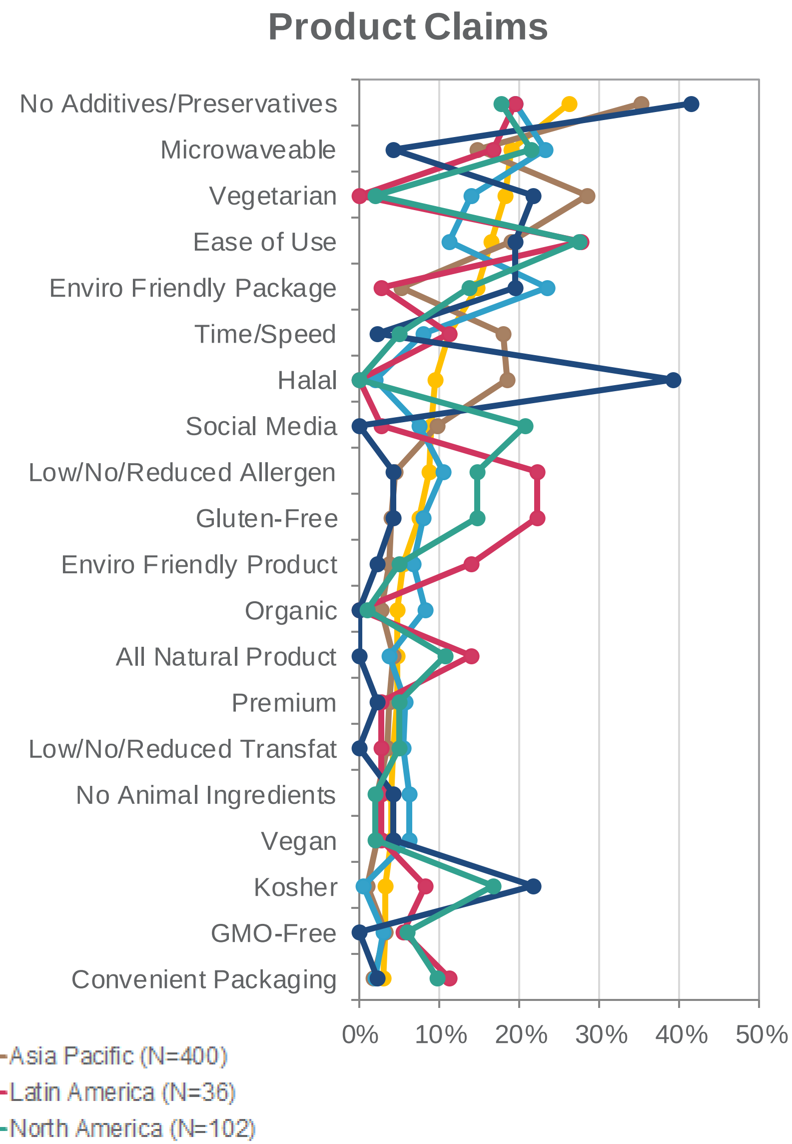


Horticulture Innovation Australia

colmar brunton.

Health and convenience are key claims used on products containing chilli. Flexible formats are the main type of packaging used, driven by Asia Pacific.





Only shown regions > 30 products launched

Innovative Chilli Launches:
L3M (January – March 2015)

Steak 'n Shake Chili 'n Cheddar Fries (USA)

Steak 'n Shake Chili 'n Cheddar Fries comprise French fries with two chili & cheddar cheese sauce pouches. The product retails in a 20-oz. recyclable pack made with 100% post-consumer materials and 100% wind energy.

Claims:
Ethical - Environmentally Friendly Package

Jamie Oliver Keep It Simple Spicy Cowboy Seasoning (South Africa)

Jamie Oliver Keep It Simple Spicy Cowboy Seasoning is an exciting blend of chilli, cocoa and coffee, said to be perfect for beef. This easy to use smoky and delicious product is suitable for vegetarians and retails in a 40g resealable pack serving four.

Claims:
Ease of Use, Convenient Packaging, Vegetarian

Amaizin Organic Chilli Corn Rolls (UK)

Claims to be irresistibly seasoned with the finest organic spices, like chilli, sweet pepper and coriander, and is fried in high oleic sunflower oil that is high in unsaturated fats. Made to an original Mexican recipe with fine organic, European, GMO free corn. It is free from gluten, wheat, GMOs and palm oil, and is suitable for vegetarians and vegans. The product retails in a 100g pack bearing the EU-Leaf organic logo.

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

The Rawlicious Food Co. Thai Chilli Kale Crisps (Netherlands)

The Rawlicious Food Co. Thai Chilli Kale Crisps is an organic product described as absolutely tasty and has been slowly dehydrated and not baked, providing maximum flavour whilst retaining all its goodness. It is handmade, 100% natural, free from gluten, wheat, additives, flavourings and preservatives, and retails in a 40g recyclable pack with Facebook, Twitter, Instagram and Pinterest logos.

Claims:
No Additives/Preservatives, All Natural Product, Low/No/Reduced Allergen, Organic, Ethical - Environmentally Friendly Package, Gluten-Free, Social Media

Source: Mintel (2015)

Innovative Chilli Launches:

L3M (January – March 2015)

Tesco Big Night In Chilli Beef Pizza (UK)

Tesco Big Night In Chilli Beef Pizza is described as a mild pizza base dusted with semolina with a chilli tomato sauce, mozzarella and cheddar cheese, topped with chilli beef, green pepper, red onion and jalapeno. It retails in a 515g recyclable pack featuring the FSC logo.

Claims:
Ethical - Environmentally Friendly Package

Woolworths Food Mini Sweet Chilli & Ginger Mascarpone Duetto (South Africa)

Woolworths Food Mini Sweet Chilli & Ginger Mascarpone Duetto comprises mascarpone cheese with red pepper and ginger, topped with sweet chilli sauce. This halal product is suitable for vegetarians with milk and retails in a 105g tub.

Claims:
No Additives/Preservatives, Kosher, Ethical - Environmentally Friendly Package, Low/No/Reduced Fat, Halal, Vegetarian

Marks & Spencer Gastropub Chilli Beef & Smoked Cheddar Slice (Ireland)

Marks & Spencer Gastropub Chilli Beef & Smoked Cheddar Slice contains slow cooked spiced minced beef and tomato, dry cured smoked bacon and smoked cheddar. The product is ready to eat and retails in a 160g pack.

Claims:
Ease of Use, Ethical - Environmentally Friendly Package

Kronfågel Taco Style Pulled Chicken with Salsa Sauce (Sweden)

Kronfågel Taco Style Pulled Chicken with Salsa Sauce is now available. The product is made with Swedish chicken which has been flavoured with taco seasoning and slowly cooked at a low temperature to ensure extra tenderness and juiciness. It only needs to be heated and retails in a 500g recyclable pack which features the Green Keyhole logo.

Claims:
Ease of Use, Ethical - Environmentally Friendly Package

Source: Mintel (2015)

Innovative Chilli Launches:
L3M (January – March 2015)

Don Chelada Original Michelada Beer Booster & Hangover Helper (USA)

Don Chelada Original Michelada Beer Booster & Hangover Helper can be mixed with 24-oz. of beer. This product is described as America's favorite michelada cup, and retails in a tub, featuring the Facebook, Twitter, Yelp, YouTube and Instagram logos.

Claims:
Other (Functional), Social Media

Walkers Sunbites Sunripened Sweet Chilli Flavour Crispy Crackers (UK)

Walkers Sunbites Sunripened Sweet Chilli Flavour Crispy Crackers are said to be full of lovely multigrains, have 30% less fat than regular crackers, and are free from preservatives and artificial colours. The product is suitable for vegetarians and retails in a 5 x 24g pack, bearing the Facebook and Twitter logos.

Claims:
No Additives/Preservatives, Social Media, Vegetarian, Low/No/Reduced Fat

New York Delhi VIP Nuts Hot Chilli Flavoured Peanuts (Spain)

New York Delhi VIP Nuts Hot Chilli Flavoured Peanuts are said to combine the style of a top New York delicatessen with age old spice blends and recipes from India. This premium product contains no artificial colourants, flavours or preservatives and retails in a 60g pack. The manufacturer can be found on the Facebook and Twitter.

Claims:
No Additives/Preservatives, Social Media, Premium

ASDA Good & Counted Beef Chilli & Wedges (UK)

ASDA Good & Counted Beef Chilli & Wedges are potato wedges with minced beef, kidney beans, red peppers and fiery green chillies. The meal for one is high in protein, contains less than 3% fat and 287kcal per serving. The microwaveable product contains no artificial colours, flavours or hydrogenated fat; and retails in a partly recyclable 350g pack.

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

Source: Mintel (2015)

Australian Chilli Launches:

L3M (January – March 2015)

Ayam Singaporean Chilli Crab Stir Fry Sauce

Salt Meats Cheese Our Nonna's Secret Recipe Chorizo Sauce

Arnott's Shapes Extreme Chilli Charge Crackers

Bika Yeko Hot and Spicy Flavour Potato Sticks

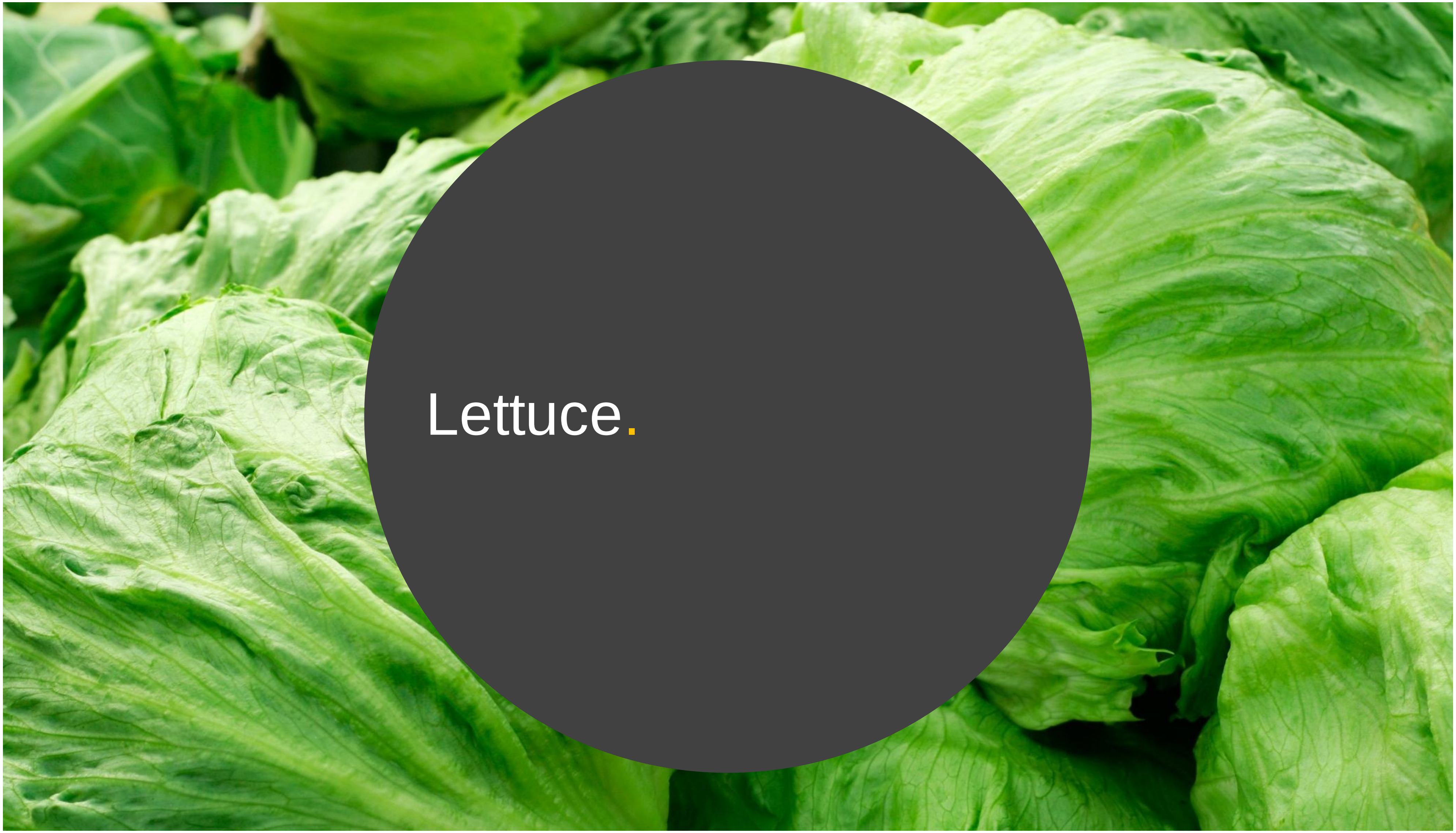
Woolworths Select Slow Cooked Beef with Bourbon

Coles Flavours of the World Thai Panang Curry Meal Kit

Kan Tong Sweet & Sour Cooking Sauce

Twisties Taco Flavoured Snack

Source: Mintel (2015)


Lettuce.

Purchase and consumption are slightly down from November, yet is still eaten once every two days.

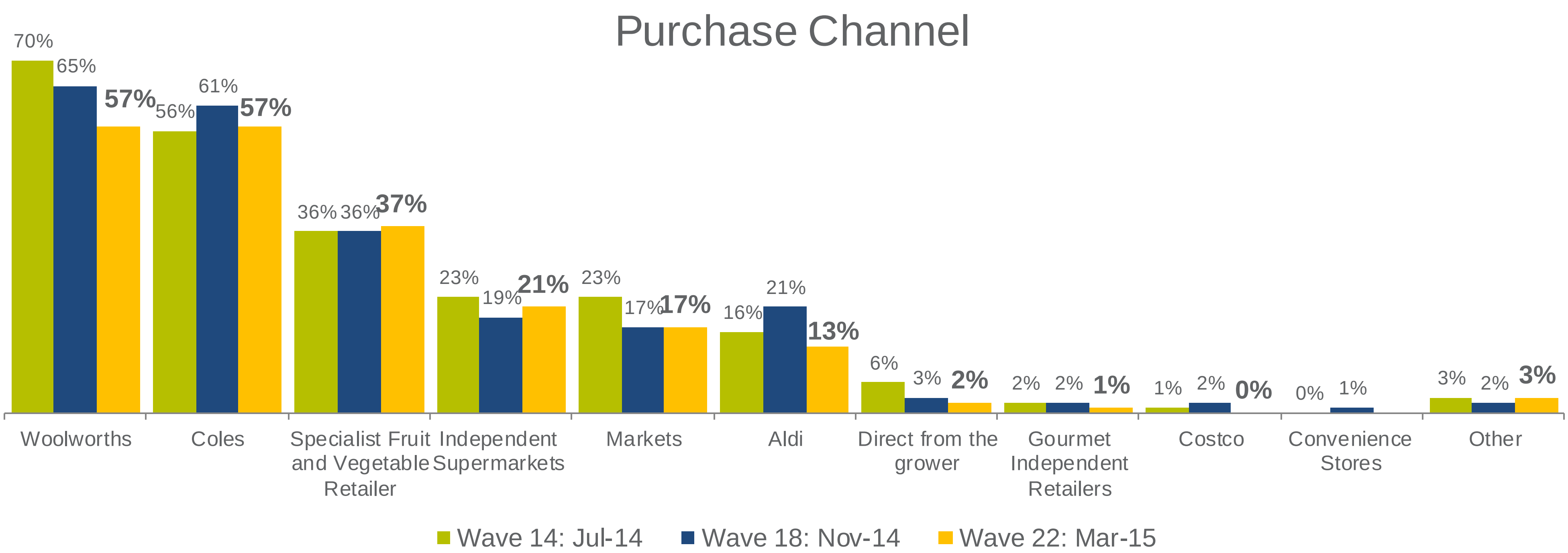
Whilst there has been a steady decrease in purchase from Woolworths, mainstream retailers are the primary channel of purchase.

Average Purchase **4.6** times per month

▲ 4.7 times, Wave 14
▲ 5.6 times, Wave 18

Average Consumption **14.0** times per month

▼ 13.0 times, Wave 14
▲ 15.7 times, Wave 18



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 14 N=315, Wave 18 N=399, Wave 22 N=314

Horticulture Innovation Australia

colmar brunton.

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

Average Spend and Price Sensitivity

Average weight of purchase

The typical consumer purchases **600g** of lettuce, which is lower than past months.

▲ 800g, Wave 14
▲ 800g, Wave 18

Decline in purchase and spend this month

Recalled last spend

Recalled spend on lettuce was **$3.30.** This is down on previous waves.

▲ $3.60, Wave 14
▲ $3.70, Wave 18

Value for money

Consumers' perceived value for money is only fair **(6.0/10)**, in line with past waves.

▼ 5.7/10, Wave 14
▲ 6.1/10, Wave 18

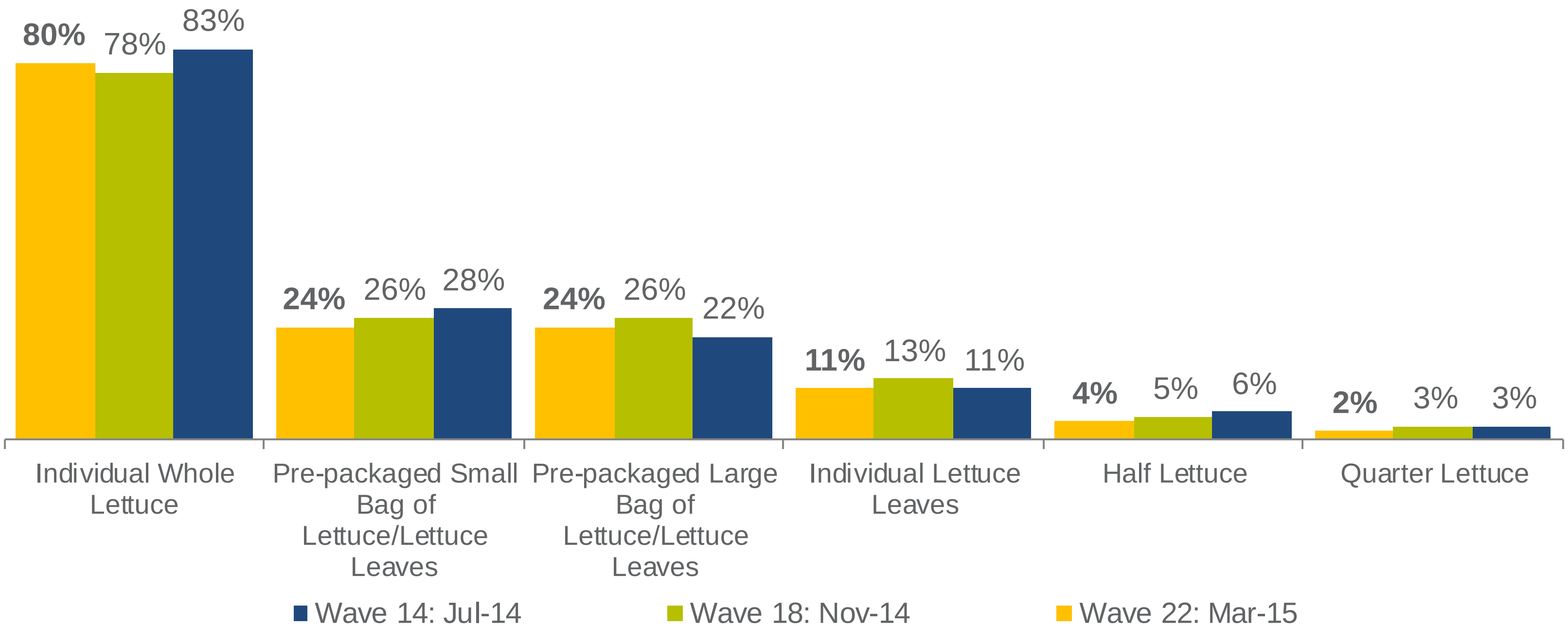
Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? 0-10 scale
Sample Wave 14 N=315, Wave 18 N=399, Wave 22 N=314

Horticulture Innovation Australia

colmar brunton.

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

Individual lettuce heads are purchased by the majority of consumers. Pre-pack lettuce leaves are also a popular format.



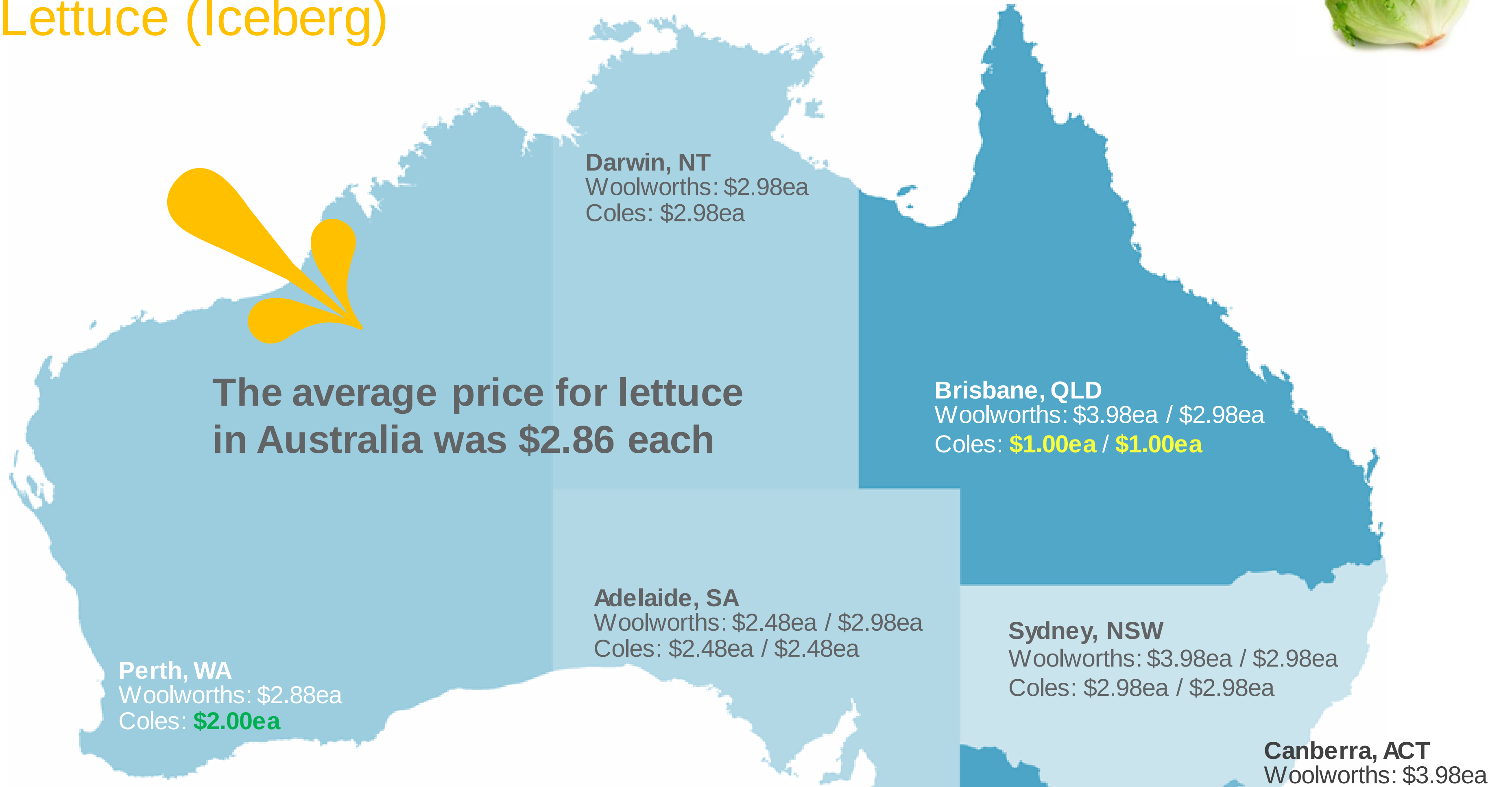
Average amount purchased per shop	Individual Whole Lettuce	Pre-packaged small bag of lettuce	Pre-packaged large bag of lettuce	Individual lettuce leaves	Half lettuce	Quarter lettuce
Wave 14: July 14	1.1	1.2	1.3	12.6	1.5	1.5
Wave 18: Nov 14	1.2	1.3	1.4	10.5	1.6	2.0
Wave 22: Mar 15	1.1	1.3	1.3	4.9	1.0	1.3

Q3a. How much <commodity> does this typically equate to?
Sample Wave 14 N=315, Wave 18 N=399, Wave 22 N=314

Horticulture Innovation Australia
colmar brunton.

Online and In-store Commodity Prices

Lettuce (Iceberg)



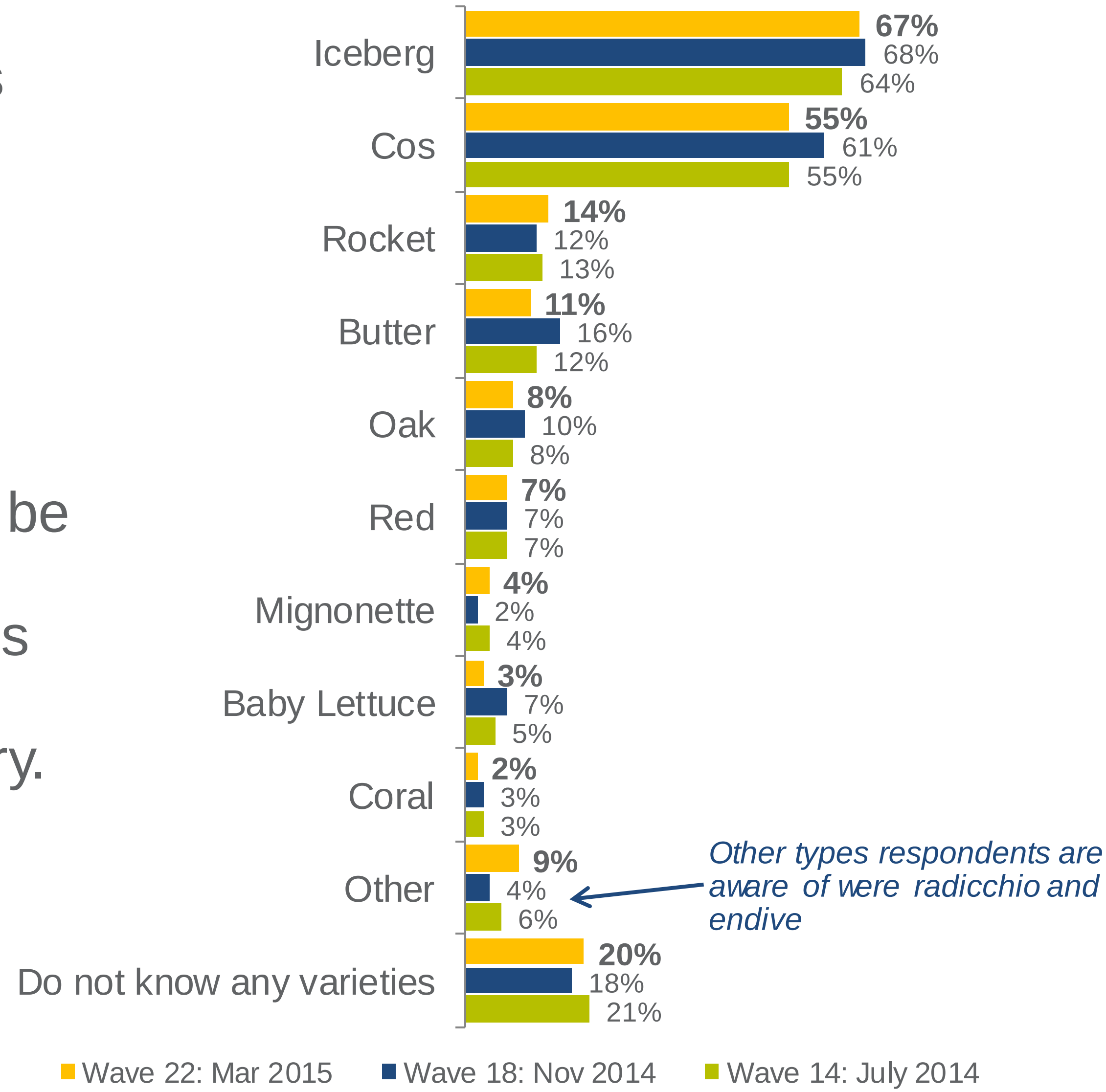
- The national average price for Iceberg lettuce was $2.86 each, which was higher than November 2014.
- Price varied between states and retailers, mainly due to promotional specials. The cheapest price was $1.00 per head in Brisbane and the most expensive at $3.98 in multiple locations.
- The retail price range for lettuce was $2.98 per head.

Pricing was carried out on 17th March 2015 between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates in-store promotional price.

Awareness of lettuce types has remained consistent across waves.

Iceberg and Cos have the greatest level of recall.

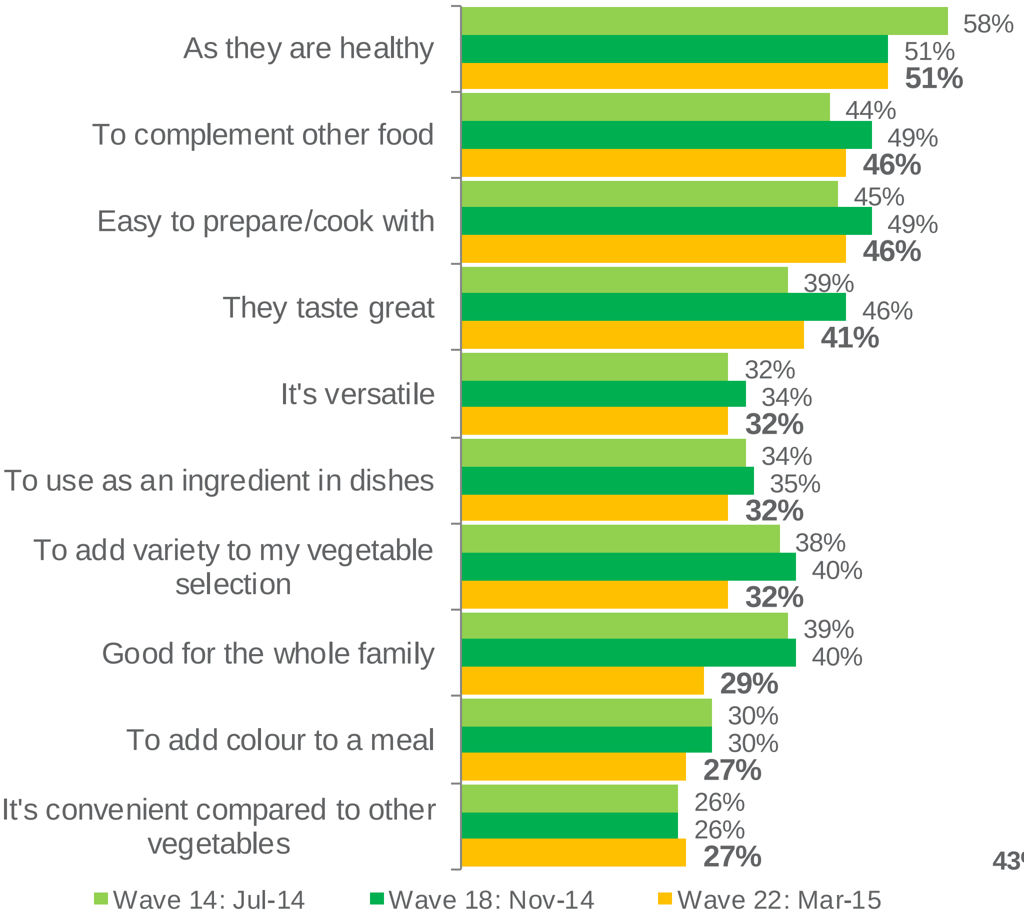
Lettuce types recalled may not be true lettuce, but are what consumers perceive as varieties e.g. rocket is not lettuce and endive and radicchio are chicory.



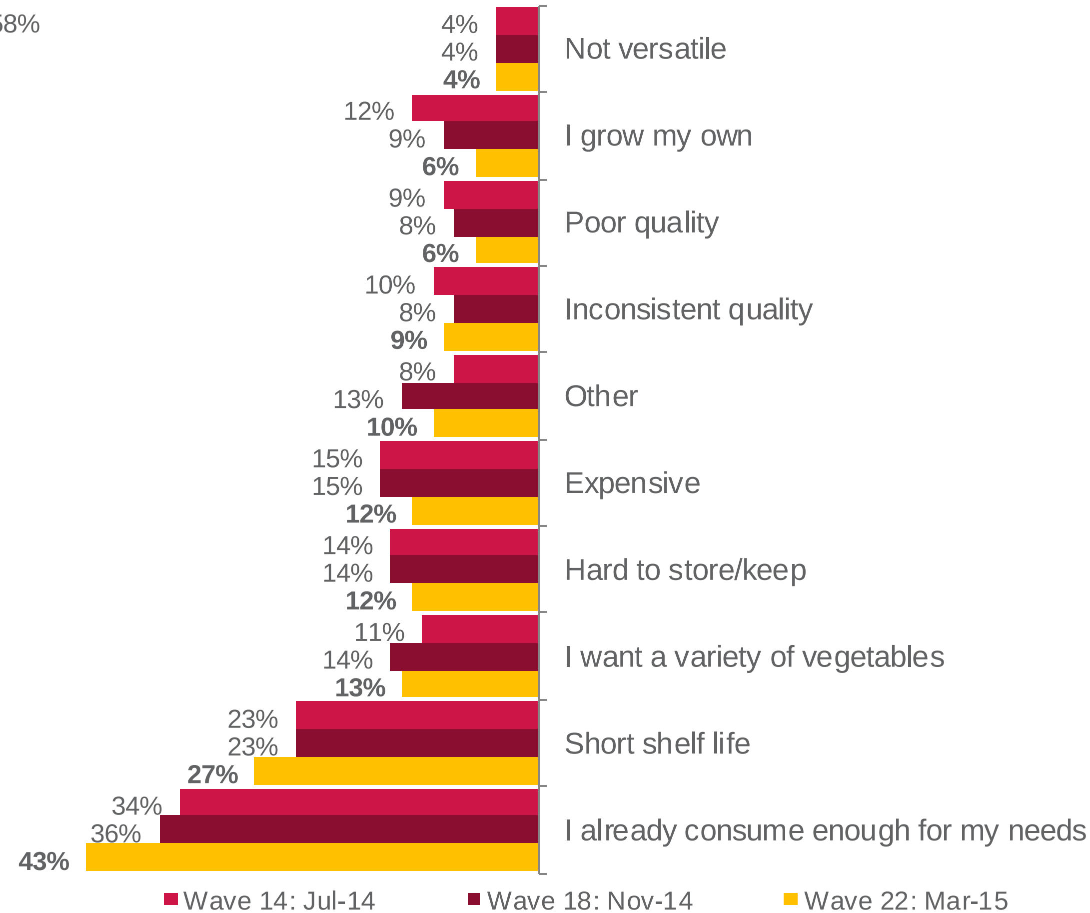
Sample Wave 14 N=315, Wave 18 N=399, Wave 22 N=314
Q6a. What types/varieties of <commodity> are you aware of? (unprompted)

Purchasing lettuce is triggered by health, complementing other food and ease of preparation. Positively, there has been a decreasing trend of consuming enough for my needs. There is an upward trend of consumers growing their own lettuce across waves.

Triggers



Barriers



Sample Wave 14 N=315, Wave 18 N=399, Wave 22 N=314
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?

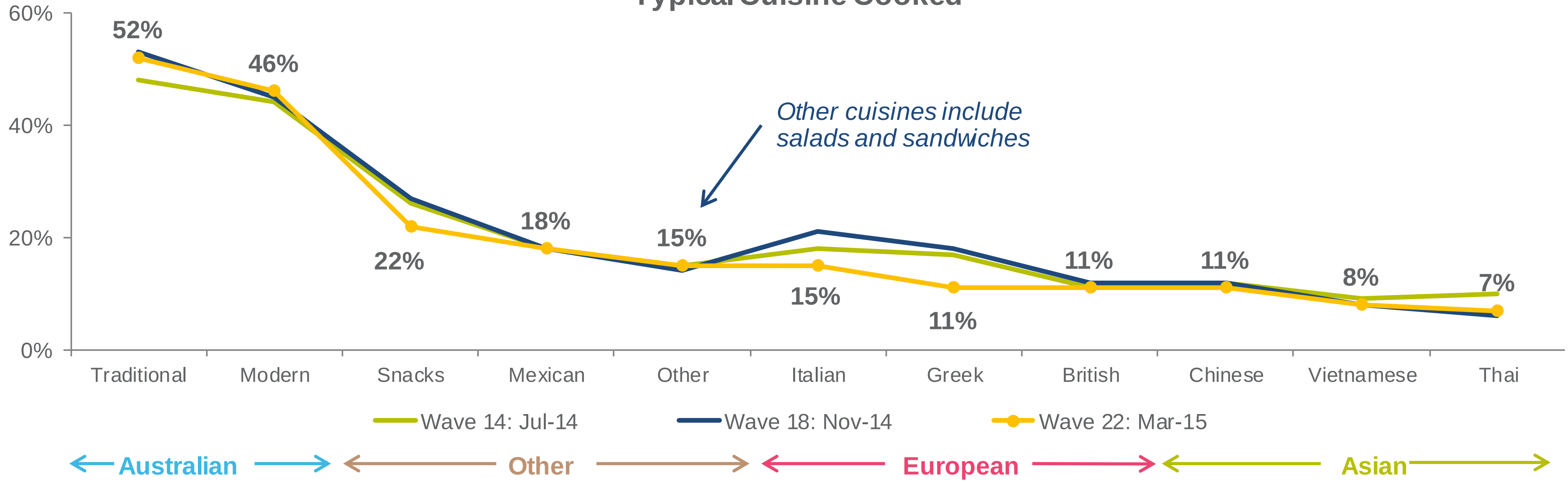
Australian cuisine remains popular. This month saw a drop in Italian and Greek cooking.

Lettuce consumption is skewed towards weekday meal occasions.

Top Consumption Occasions

	Wave 22	Wave 18	Wave 14
Weekday Lunch	**47%**	47%	44%
Weekday Dinner	**43%**	52%	43%
Quick Meals	**39%**	39%	43%
Weekend Lunch	**37%**	46%	36%
Weekend Dinner	**35%**	41%	36%

Typical Cuisine Cooked



Sample Wave 14 N=315, Wave 18 N=399, Wave 22 N=314
Q10. What cuisines do you cook/consume that use <commodity> ?
Q11. Which of the following occasions do you typically consume/use <commodity> ?

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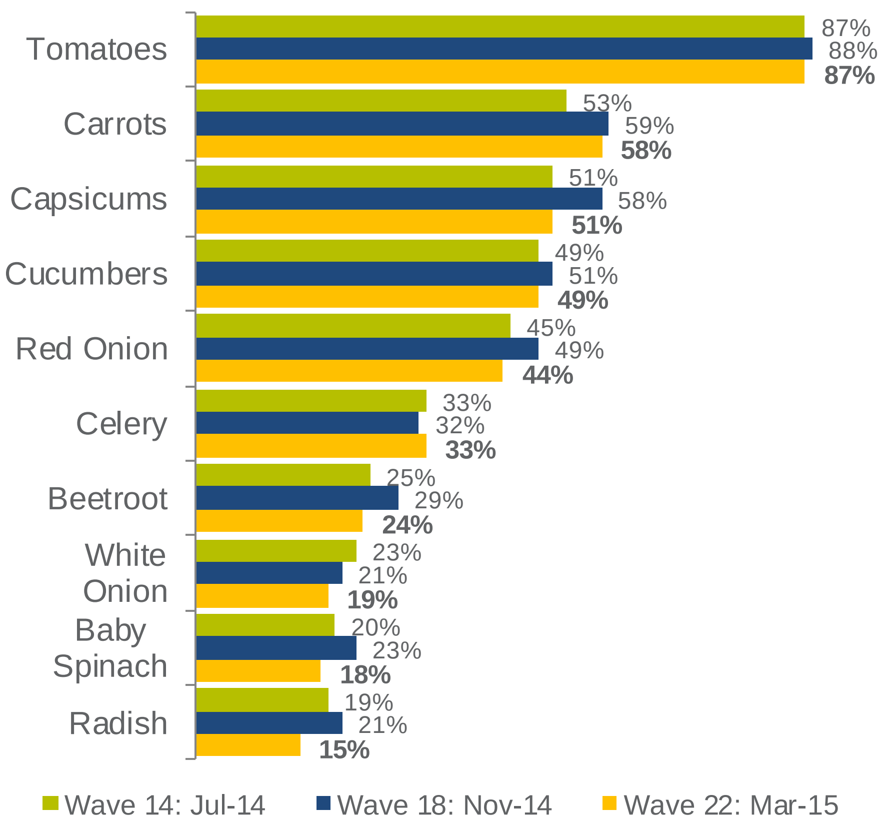
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

The majority of lettuce is eaten raw and served with tomatoes, carrots and capsicum.

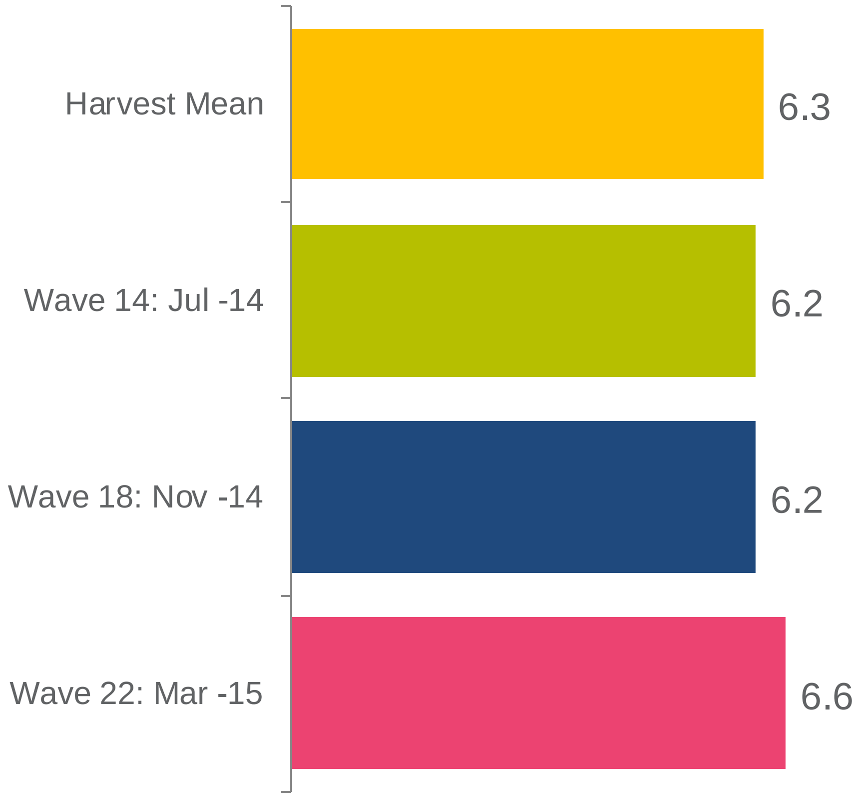
Top 10 Accompanying Vegetables



Top 10 Cooking Styles			
	Wave 10	Wave 14	Wave 18
Raw	74%	76%	71%
Other- not cooked	20%	19%	21%
Stir frying	7%	7%	7%
Soup	3%	4%	3%
Sautéing	2%	2%	3%
Shallow Frying	2%	1%	2%
Boiling	3%	3%	2%
Steaming	2%	4%	2%
Microwave	1%	0%	1%
Deep Frying	1%	0%	1%

Sample Wave 14 N=315, Wave 18 N=399, Wave 22 N=314
Q9. How do you typically cook <commodity> ?
Q10a. And w hen are you serving <commodity> w hich of the follow ing do you also serve together w ith this ?

There has been a noticeable increase in the importance of lettuce provenance this month. This provides growers with the opportunity to clearly communicate all Australian grown produce.



Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 14 N=315, Wave 18 N=399, Wave 22 N=314

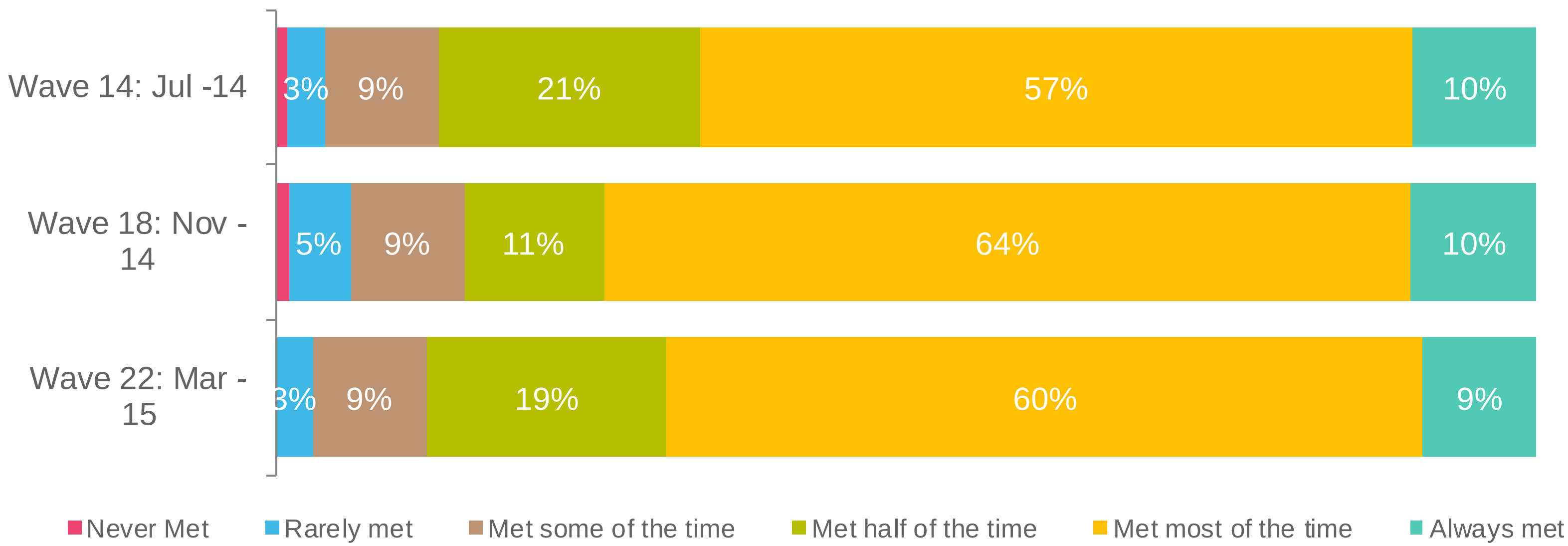
Expected longevity of freshness has fallen from previous waves.

Expectations of freshness being met are in line with levels in July last year.

Expected to stay fresh for **7.1** days

▲ 7.5 days, Wave 14
▲ 7.2 days, Wave 18

Expectations Met



Sample Wave 14 N=315, Wave 18 N=399, Wave 22 N=314
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> ?

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

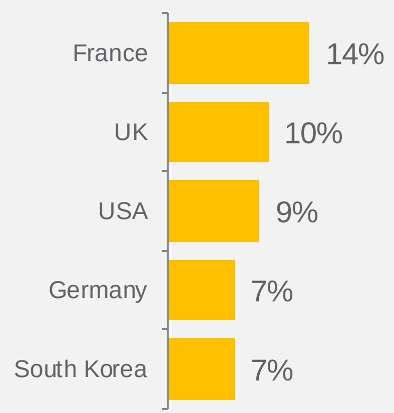
Trends: Lettuce

Lettuce Global Launches

January – March 2015

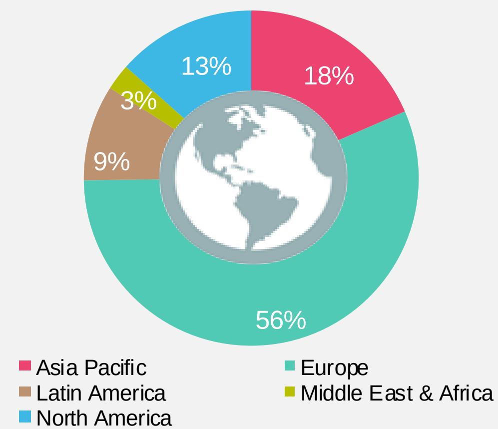
There were 119 products launched globally over the last three months that contained lettuce as an ingredient. The main regions for launches were Europe and Asia Pacific. Product launches were primarily meals and fruit and vegetables.

Country

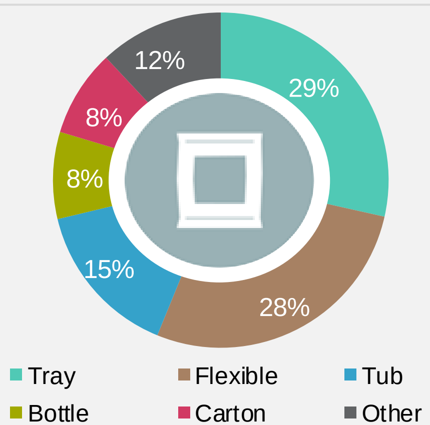


119 Global NPDs

Region



Top Pack Formats



Categories

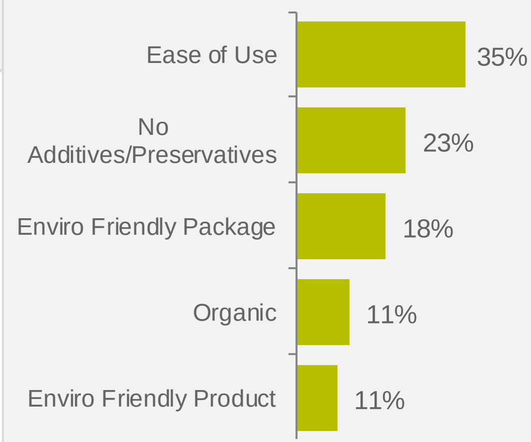
Meals 49%

Fruit & Vegetables 28%

Juice Drinks 13%

Sauces & Seasoning 4%

Top Claims



Lettuce Product Launches:
Last 3 Months (January – March 2015)
Summary

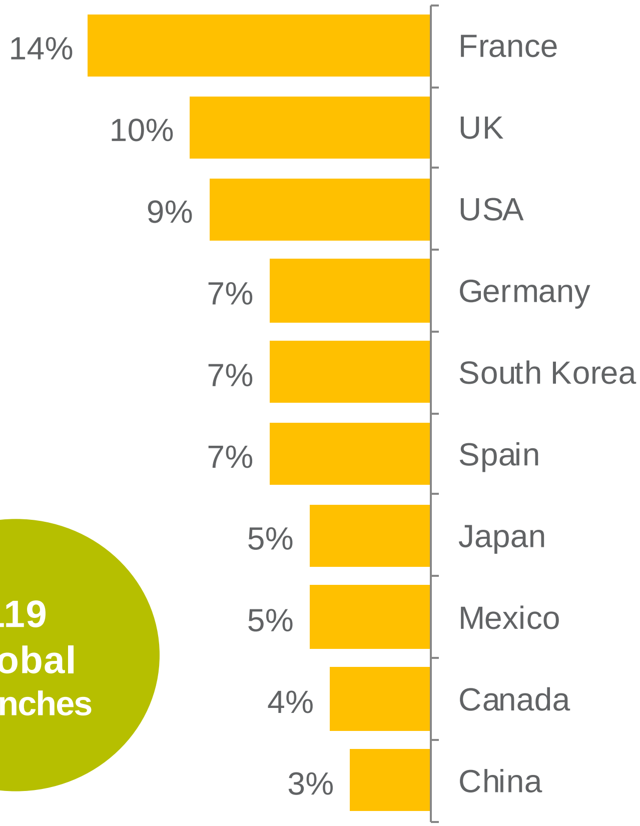
- Globally, there were 119 products launched, which was in line with previous trends.
- There were 3 products containing lettuce as an ingredient launched in Australia over the last 3 months, all under the Houston's Farm brand.
- The majority of products were launched in Europe (56%) and Asia Pacific (18%).
- Trays (29%) and flexible formats (28%) remained the main packaging formats used.
- The top categories for launches were meals (49%), fruit and vegetables (28%) and juice drinks (13%), which was consistent with previous trends.
- The key claims used over the past three months were ease of use (35%), no additives and preservatives (23%) and environmentally friendly packaging (18%).
- The most innovative launches found were a thousand island salad mix launched in Spain and Venezualan sedative drops made of lettuce extract. Examples of these can be found over the next slides.

Source: Mintel (2015)

The main countries for products launched were France, UK & USA.

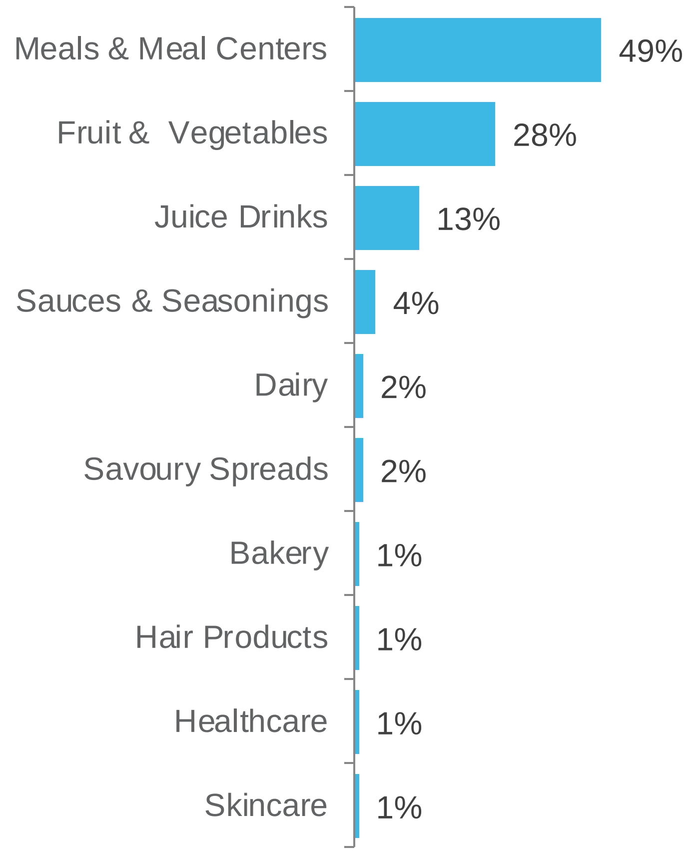
Consistent with previous trends, launches were in meals, fruit and vegetables and juice categories.

Top Launch Countries



119 Global Launches

Top Launch Categories



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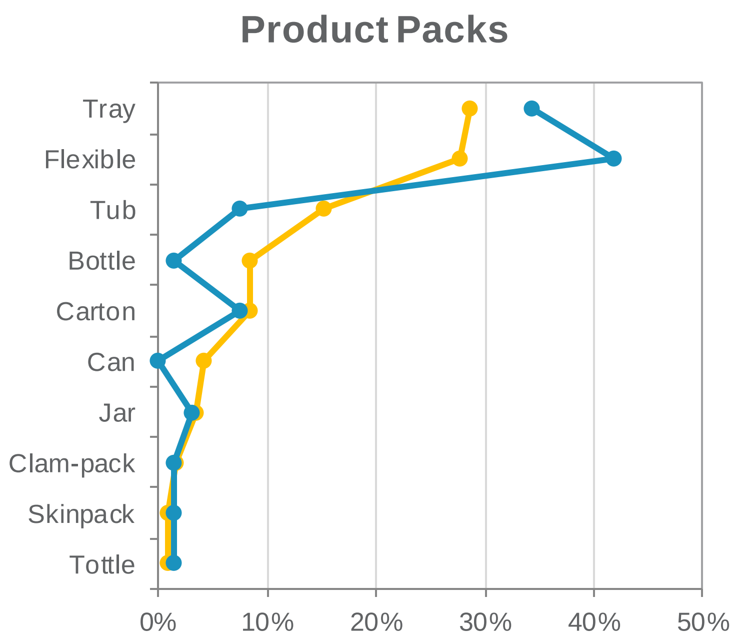
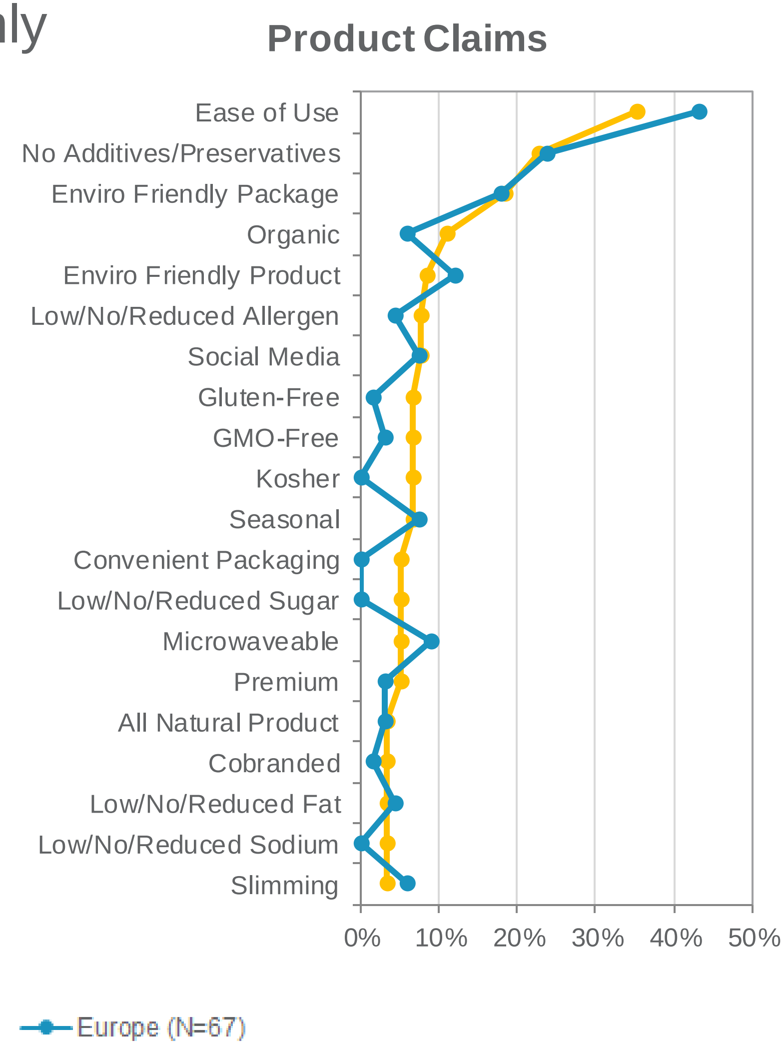
Product claims were around ease of use and health. This was consistent with the Europe, the region with the most launches in the last three months.

Trays and flexible packs were most commonly used, driven by use in Europe.





Only regions with n >30 are displayed

Innovative Lettuce Launches:
L3M (January – March 2015)

Evolution Fresh Cold-Pressed Sweet Greens & Lemon Juice Blend (USA)

Evolution Fresh Cold-Pressed Sweet Greens & Lemon Juice Blend has been repackaged and is now available in a 32-fl.oz. pack featuring a QR code. It comprises juices of celery, apple, cucumber, spinach, romaine, kale, lime, lemon and parsley. The high pressure processed juice blend is free from GMO and has been kosher certified.

Claims:
Kosher, GMO-Free

Skin Food Premium Lettuce & Cucumber Watery Soothing Pack (South Korea)

Skin Food Premium Lettuce & Cucumber Watery Soothing Pack is formulated with lettuce extract (5%), cucumber extract (5%), and cucumber water (20%) to refresh, cool, and moisturise skin. It retails in a 100g pack. Also available are: Watery Toner; Watery Cream; Watery Gel Mask; Watery Essence; and Watery Emulsion.

Claims:
Botanical/Herbal, Moisturising / Hydrating, Toning*

Verdifresh Thousand Island Salad (Spain)

Verdifresh Mil Islas (Thousand Island Salad) features a mix of iceberg lettuce, curly endive, carrots, corn, white cabbage, crab sticks and pink sauce. The product retails in a 330g pack including a fork.

Claims:
NA

Herdez 8 Lemon-Spicy Vegetable Juice (Mexico)

Herdez 8 Jugo de 8 Verduras Picante-Limón (Lemon-Spicy Vegetable Juice) has been repackaged in a newly designed 335ml can featuring the ESR (Empresa Socialmente Responsable) and Saber Nutrir logos. The preservative-free product is low in sodium and enriched with vitamins A and C.

Claims:
Ethical - Charity, No Additives/Preservatives, Low/No/Reduced Sodium, Vitamin/Mineral Fortified, Ethical - Environmentally Friendly Product

Source: Mintel (2015)

Innovative Lettuce Launches:
L3M (January – March 2015)

Sainsbury's Taste the Difference Tomato & Mozzarella Salad (UK)

Sainsbury's Taste the Difference Tomato & Mozzarella Salad comprises a mix of baby leaves with pomodorino tomatoes, SunBlush tomatoes, mozzarella cheese and a basil dressing. This washed and ready-to-eat premium product retails in a 160g partly recyclable pack providing two servings.

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

Yumi Antidote Juice Drink (France)

Yumi Antidote (Antidote Juice Drink) helps for soothing hangovers. This product comprises cucumber, granny apple, Roman lettuce, lemon, grapefruit, mint, green melon, ginger, celeriac, and spinach, has been cold extracted to get more nutrients, and has been made with the HPP technology to preserve vitamins, nutrients and flavours. It is free from additives, not pasteurised, and retails in a 330ml bottle.

Claims:
No Additives/Preservatives, Other (Functional), Antioxidant

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

Auchan Pause Snack Spanish-Style Chicken & Pasta Salad (France)

Auchan Pause Spanish-Style Chicken & Pasta Salad is now available. The product is made with a recipe created by consumers via the 'Le Chef C'est Vous!' Auchan Facebook page contest. It comprises pasta, vegetables, roasted chicken, mozzarella balls, and mixed salad leaf, accompanied by a balsamic vinegar vinaigrette, and a salted butter caramel muffin. The product retails in a recyclable 320g pack providing one serving, and including cutlery and a serviette.

Claims:
Social Media, Ethical - Environmentally Friendly Package

Source: Mintel (2015)

Innovative Lettuce Launches:

L3M (January – March 2015)

Grimmway Farms True Organic Bunched Greens 100% Fruit & Vegetable Smoothie (Canada)

Grimmway Farms True Organic Bunched Greens 100% Fruit & Vegetable Smoothie is a blend of eight fruits and vegetable juices and purees not from and from concentrate, including spinach leaves, lettuce leaves, banana, kale leaves, lemon, and apples. This gluten-free product is USDA organic and kosher certified, and retails in an 828ml bottle.

Claims:
Ease of Use, No Additives/Preservatives, Low/No/Reduced Sodium, Low/No/Reduced Sugar

Time to Taste Salad with Soft Cheese, Olives & Yogurt Dressing (Germany)

Time to Taste Salat mit Weichkäse, Oliven und Joghurt-Dressing (Salad with Soft Cheese, Olives & Yogurt Dressing) is ready to eat. The product retails in a 280g pack containing 200g salad mix, 80ml yogurt dressing and a fork.

Claims:
Ease of Use, Vegan, No Animal Ingredients

Inprovit Pasivit Plus Sedative Drops (Venezualan)

Inprovit Pasivit Plus Gotas Sedante Nervioso (Sedative Drops) are now available. The 100% natural product is said to have a sedative effect and to help induce sleep. It is aimed at adults and seniors, and retails in a 30ml pack.

Claims:
All Natural Product, Stress & Sleep (Functional)

Nette Shrimp Salad (South Korea)

Nette Shrimp Salad is now available. The product consists of vegetables, shrimp, quail egg and dressing. It retails in a 176g pack.

Claims:
N/A

Source: Mintel (2015)

Australian Lettuce Launches:
L3M (January – March 2015)

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

Houston's Farm Greek Salad with Fetta and Olives

Houston's Farm Greek Salad with Fetta and Olives includes tomato, cucumber, capsicum, and Birch & Waite Greek lemon dressing. The product provides two servings of vegetables and retails in a 150g pack including a fork.

Claims:
Cobranded

Houston's Farm Garden Salad with Cheddar

Houston's Farm Garden Salad with Cheddar includes tomato, cucumber, celery, carrot, and Birch & Waite white French vinaigrette dressing. The product provides two servings of vegetables and retails in a 150g pack including a fork.

Claims:
Cobranded

Source: Mintel (2015)

Sweet Corn.

Purchase and consumption is in line with past months.

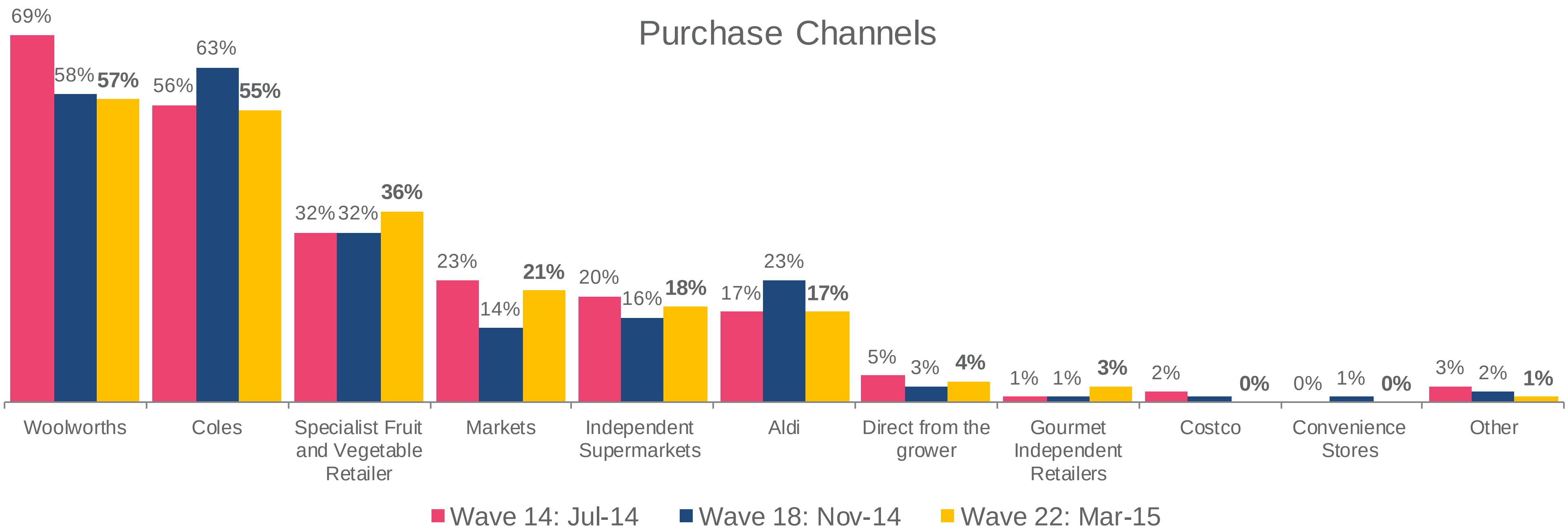
Purchase remains primarily through Coles and Woolworths. This month saw an increase in purchase from specialist retailers and markets.

Average Purchase **3.3** times per month

▲ 3.5 times, Wave 14
▲ 3.6 times, Wave 18

Average Consumption **6.6** times per month

▼ 6.2 times, Wave 14
▲ 6.7 times, Wave 18



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 14 N=308, Wave 18 N=398, Wave 22 N=311

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

Average Spend and Price Sensitivity

Average weight of purchase

The typical consumer purchases **900g** of sweet corn, which is stable across waves.

– 900g, Wave 14
– 900g, Wave 18

Recalled last spend

Recalled last spend on sweet corn was **$3.70,** which is substantially cheaper than past months.

▲ $4.40, Wave 14
▲ $4.30, Wave 18

Value for money

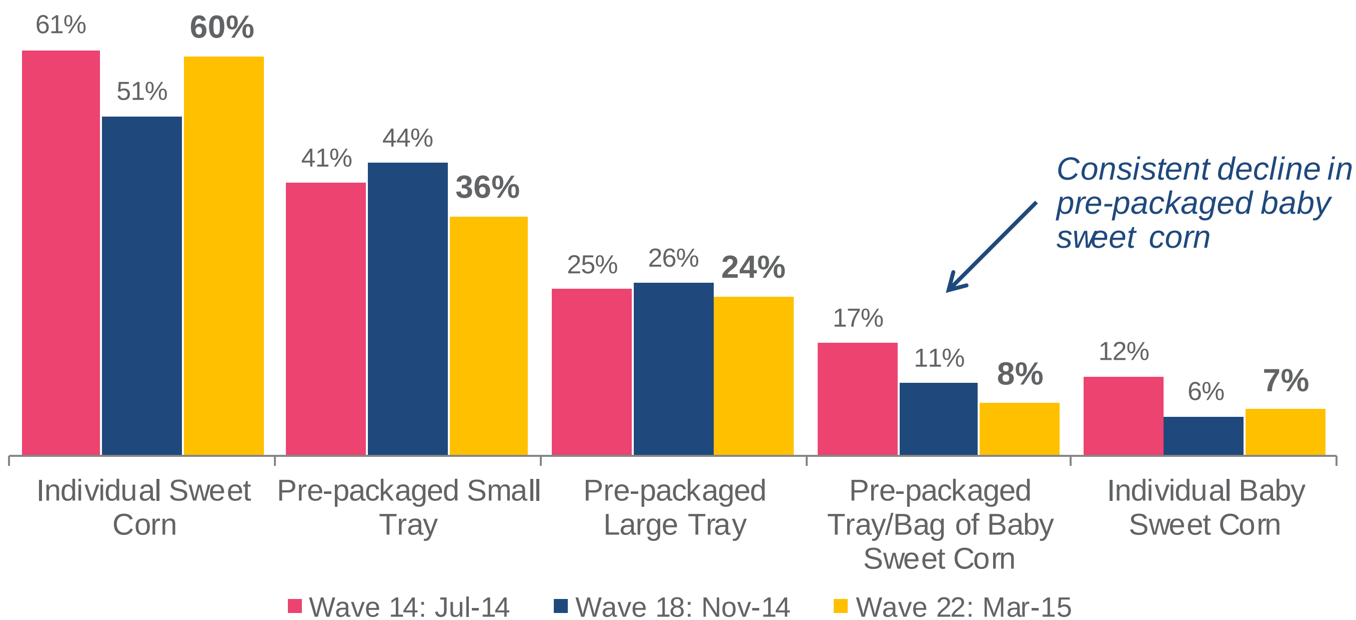
Consumers' perceived value for money was good **(6.6/10)**, which has consistently increased across waves.

▼ 6.5/10, Wave 10
▼ 6.1/10, Wave 14

Q3. How much <commodity> do you typically purchase w hen 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 14 N=308, Wave 18 N=398, Wave 22 N=311

▼: Indicates LOWER score than current wav e.
▲: Indicates HIGHER score than current wav e.

Individual cobs and small trays of corn remain the most common formats purchase. Consumers typically purchase 3-4 cobs per shop.

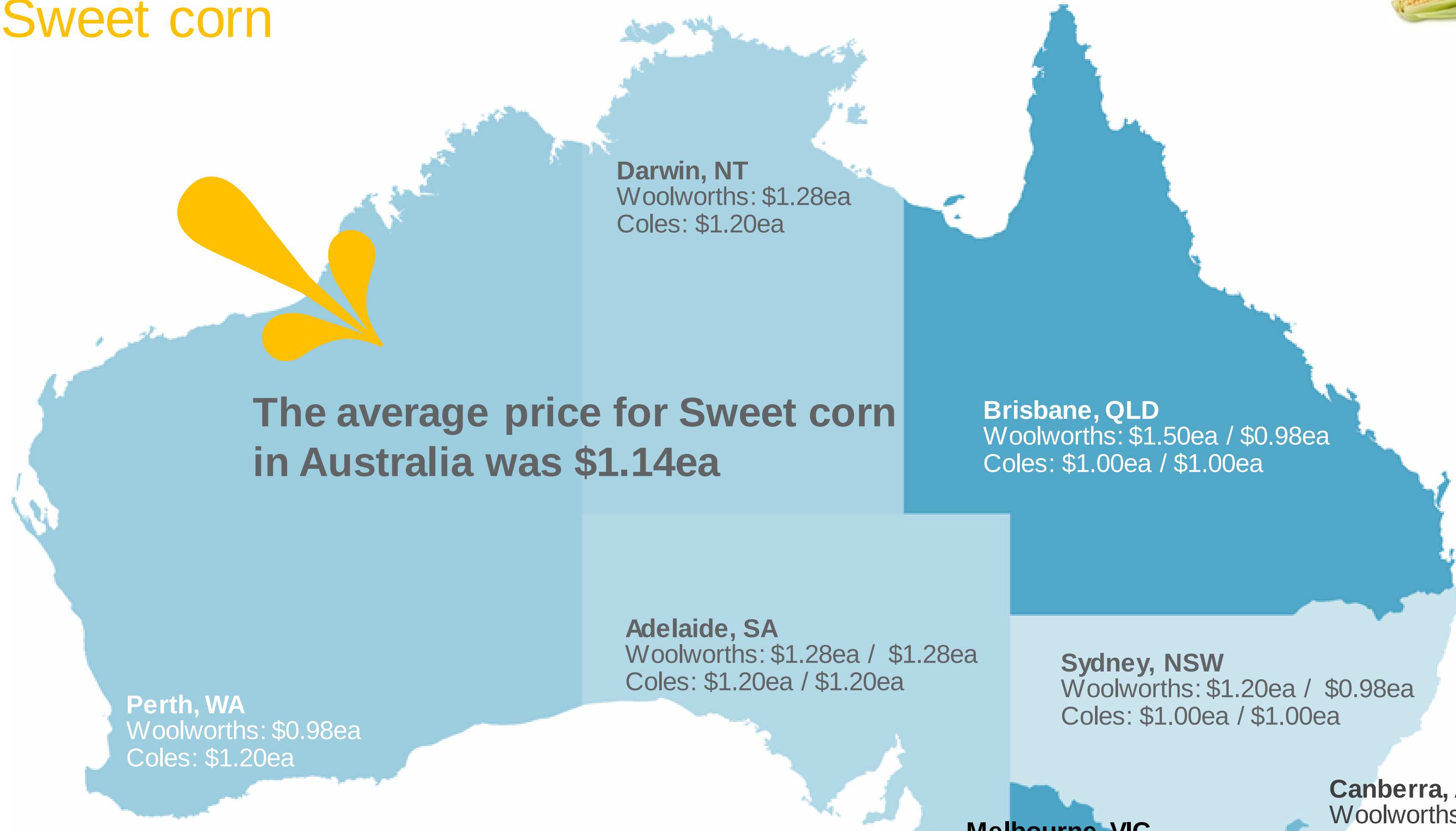


Average Amount Purchased	Individual Sweet Corn	Pre-package Small Tray	Pre-packaged Large Tray	Pre-packaged Baby Sweet Corn	Individual Baby Corn
Wave 14: July 2014	3.5	1.8	1.8	2.5	5.8
Wave 18: Nov 2014	3.4	1.6	1.5	2.5	4.4
Wave 22: Mar 2015	3.6	1.7	1.7	2.7	6.0

Q3a. How much <commodity> does this typically equate to?
Sample Wave 14 N=308, Wave 18 N=398, Wave 22 N=311

Online and In-store Commodity Prices

Sweet corn

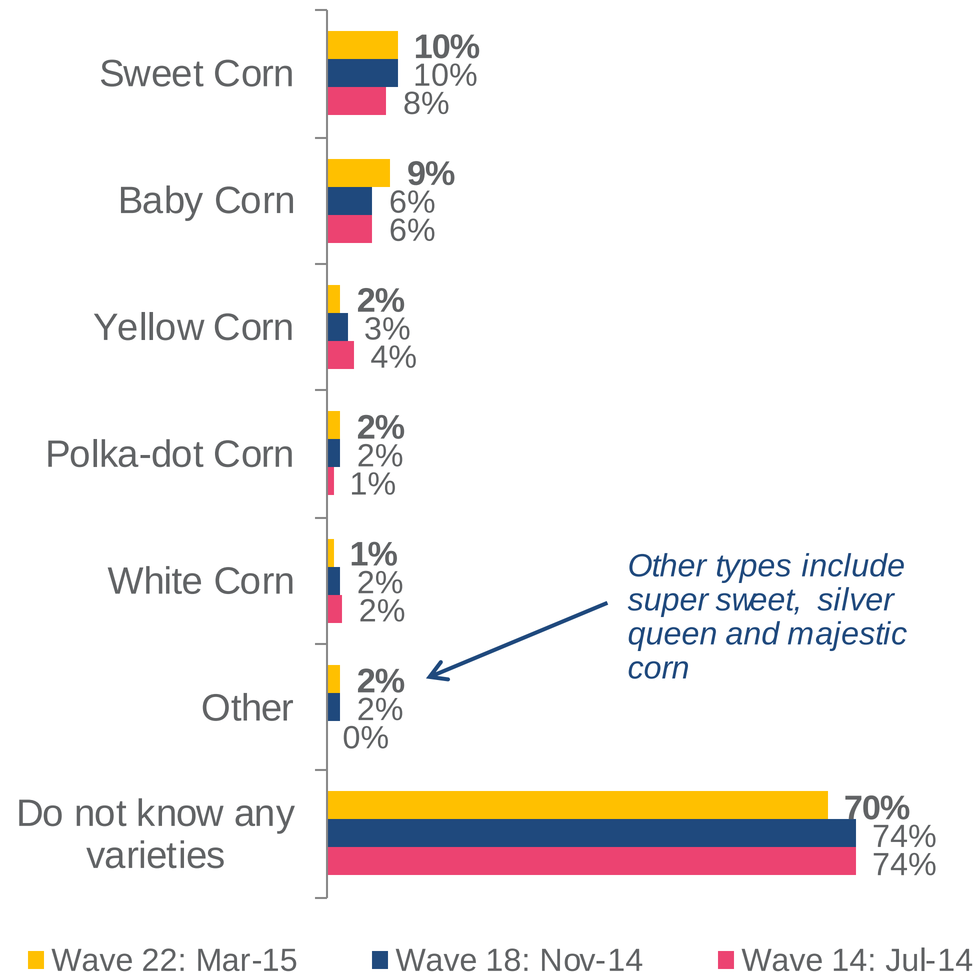


- The average price for sweet corn in November was $1.14 per cob, which was consistent with November 2014.
- There was little variation between states and retailers. The cheapest prices was $0.80 in Melbourne. The most expensive price was $1.50 in Brisbane.
- The retail price range was $0.70, which was consistent with previous waves.

Pricing was carried out on 17th March 2015 between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates in-store promotional price.

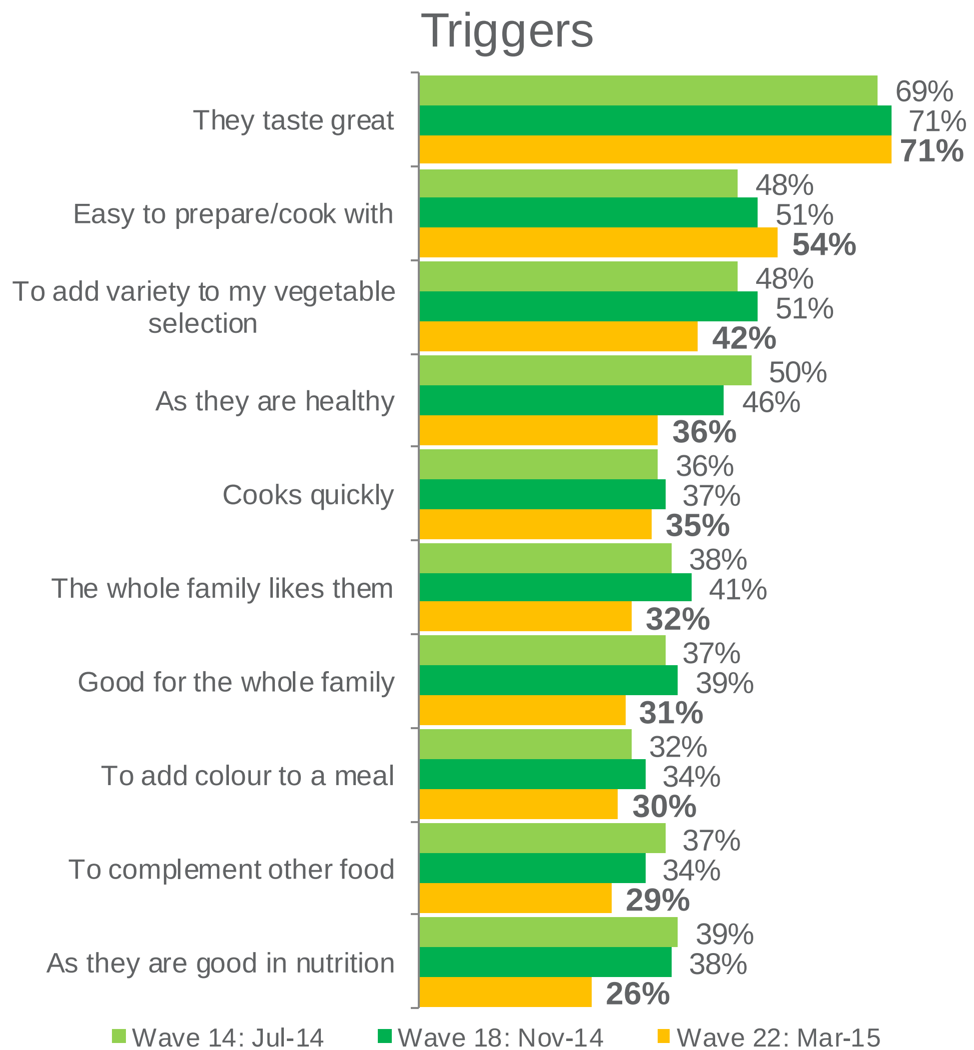
Awareness of sweet corn remains very low.

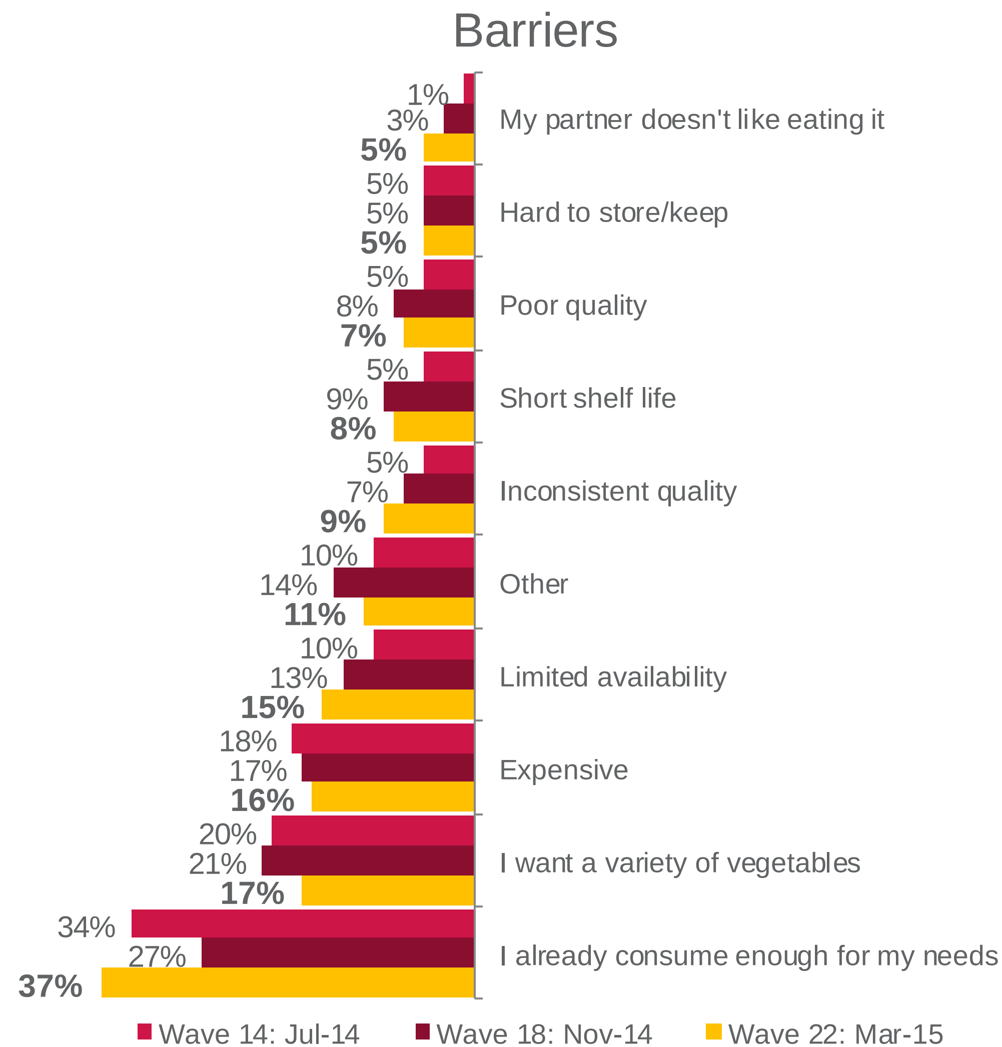
Sweet corn in general remains the most recalled type. There is a noticeable increase in recall of baby corn types this month.



Q6a. What varieties of <commodity> are you aware of? (unprompted)
Sample Wave 14 N=308, Wave 18 N=398, Wave 22 N=311

The key motivation to purchasing sweet corn is taste. Ease of preparation is an increasing trigger to purchase. Consuming enough for my needs is the main barrier to purchase. Consumers are increasingly finding limited sweet corn availability.





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 14 N=308, Wave 18 N=398, Wave 22 N=311

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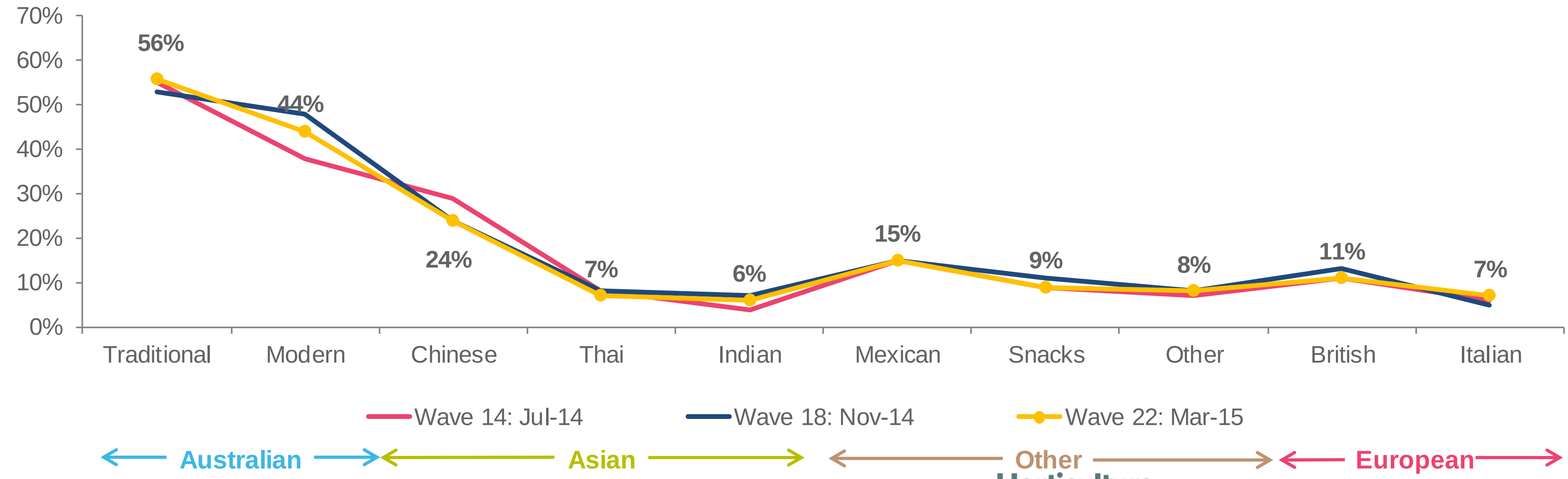
Australian cuisine continues to be used for sweet corn meals. Chinese and Mexican are also popular.

Dinner remains the main meal occasion for corn.

Top Consumption Occasions

	Wave 22	Wave 18	Wave 14
Weekday Dinner	**57%**	58%	52%
Weekend Dinner	**38%**	41%	34%
Family Meals	**33%**	31%	37%
Every-day Meals	**25%**	24%	24%
Quick Meals	**25%**	32%	26%

Typical Cuisine Cooked

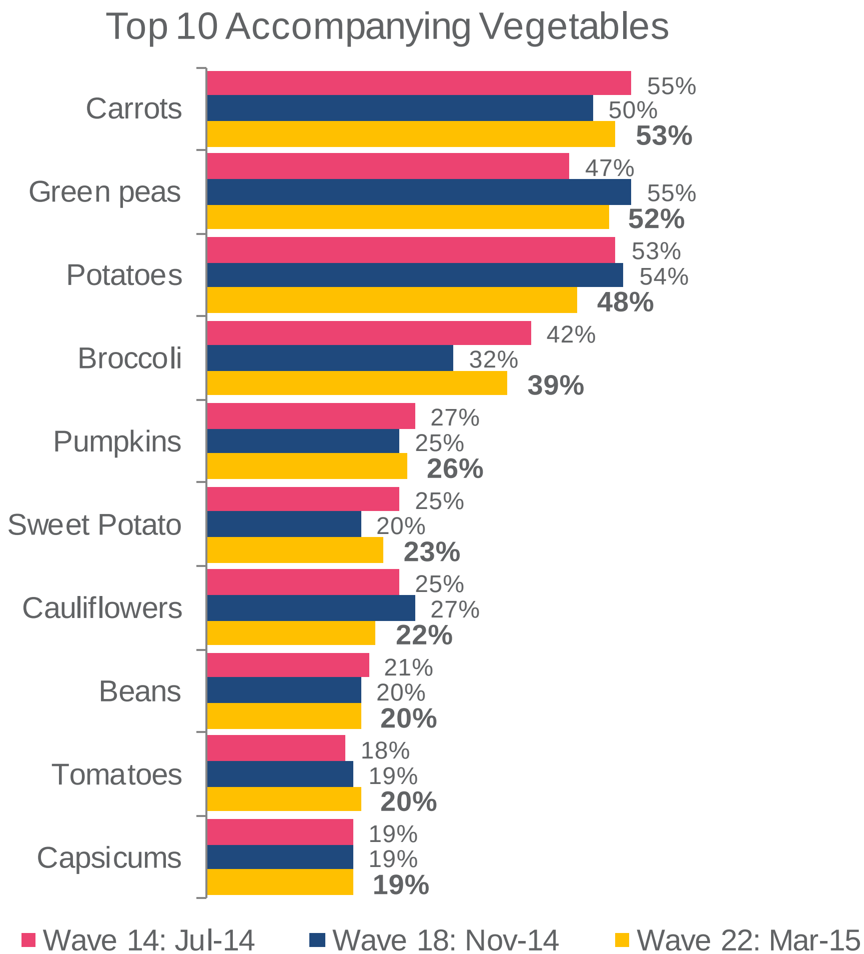


Sample Wave 14 N=308, Wave 18 N=398, Wave 22 N=311
Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?

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

On trend with previous waves, consumers prefer to boil, steam and microwave sweet corn.

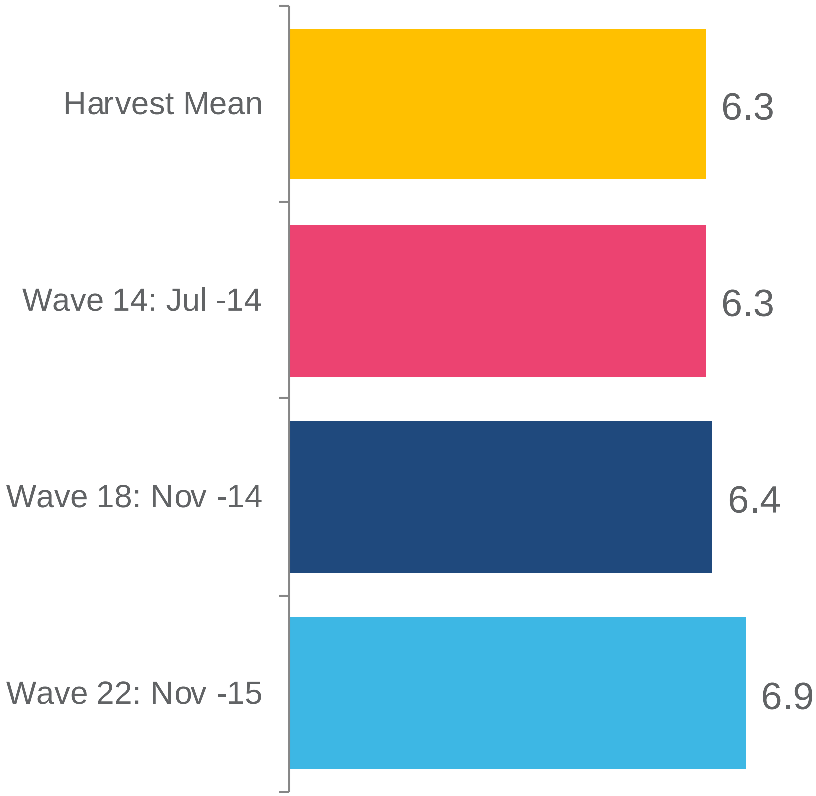
Carrots, green peas and potatoes are regularly served with sweet corn.



Top 10 Cooking Styles			
	Wave 14	Wave 18	Wave 22
Boiling	54%	54%	57%
Steaming	39%	46%	40%
Microwave	33%	31%	26%
Soup	19%	15%	14%
Stir frying	18%	16%	13%
Roasting	9%	10%	13%
Grilling	12%	13%	10%
Raw	6%	6%	7%
Baking	7%	5%	7%
Other	5%	6%	5%

Sample Wave 14 N=308, Wave 18 N=398, Wave 22 N=311
Q9. How do you typically cook <commodity>?
Q10a. And w hen are you serving <commodity> w hich of the follow ing do you also serve together w ith this?

Over the past months importance of provenance has increased, and particularly so in this wave. It is a crucial time to clearly label Australian sweet corn to reassure consumers of quality produce.



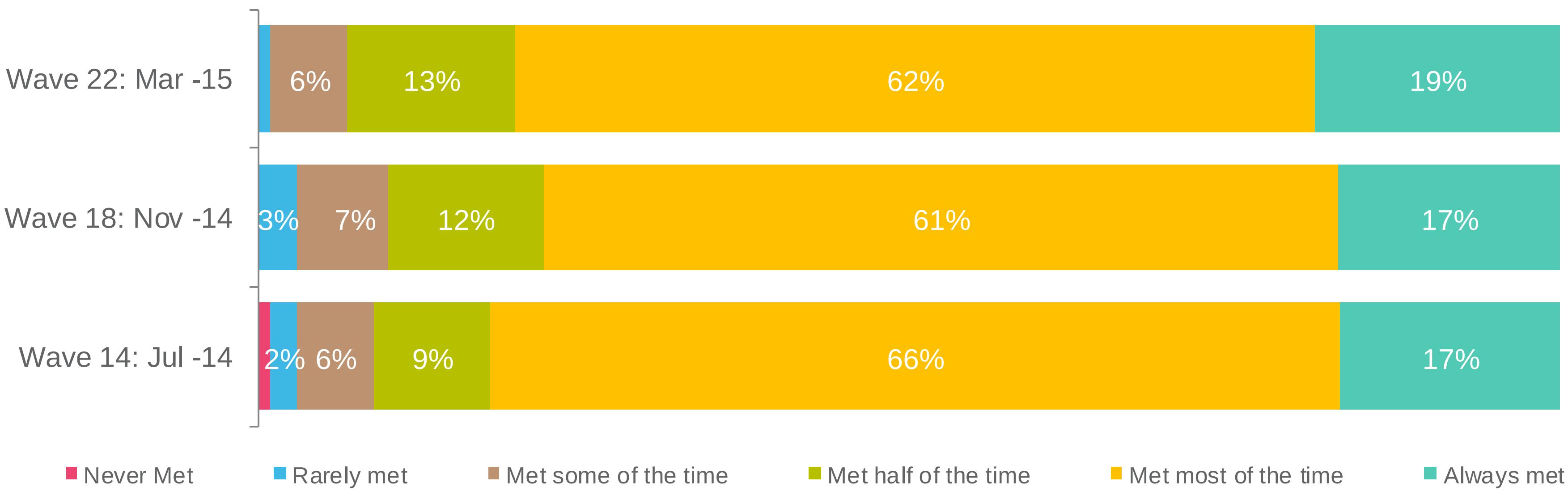
Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 14 N=308, Wave 18 N=398, Wave 22 N=311

Sweet corn freshness is largely unaffected by seasonal changes, with consistent longevity and expectations of freshness across waves.

Expected to stay fresh for **7.7** days

▲ 8.0 days, Wave 14
▲ 7.9 days, Wave 18

Expectations Met



Sample Wave 14 N=308, Wave 18 N=398, Wave 22 N=311
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> ?

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

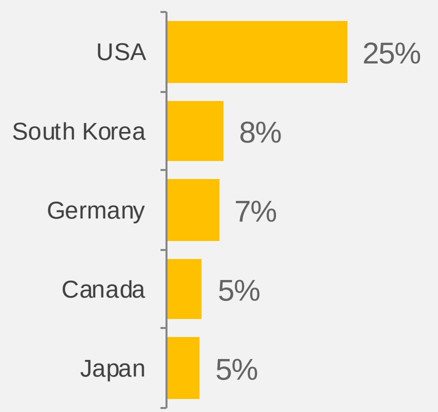
Trends:
Sweet Corn

Sweet Corn Global Launches

January – March 2015

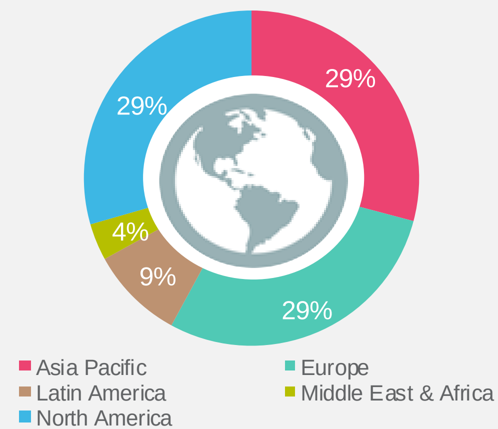
There were 309 sweet corn products launched globally over the last three months. The majority of launches were in USA. Categories for launches were meals and snacks. Key packaging for sweet corn products was flexible formats.

Country

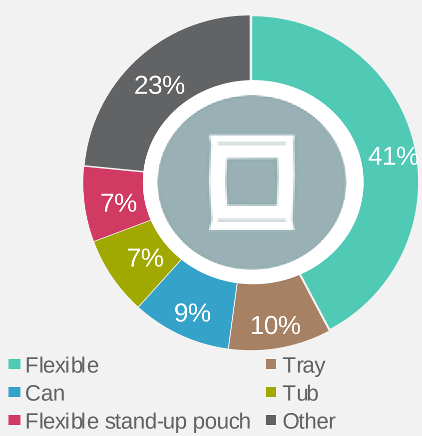


309 Global NPDs

Region



Top Pack Formats



Categories

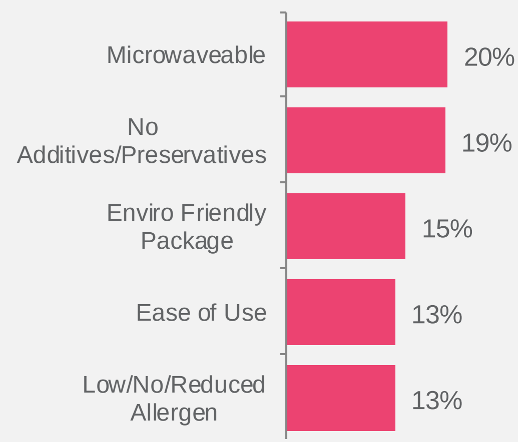
Snacks 21%

Meals 16%

Bakery 14%

Fruit & Vegetables 11%

Top Claims



Sweet Corn Product Launches:
Last 3 Months (January – March 2015)
Summary

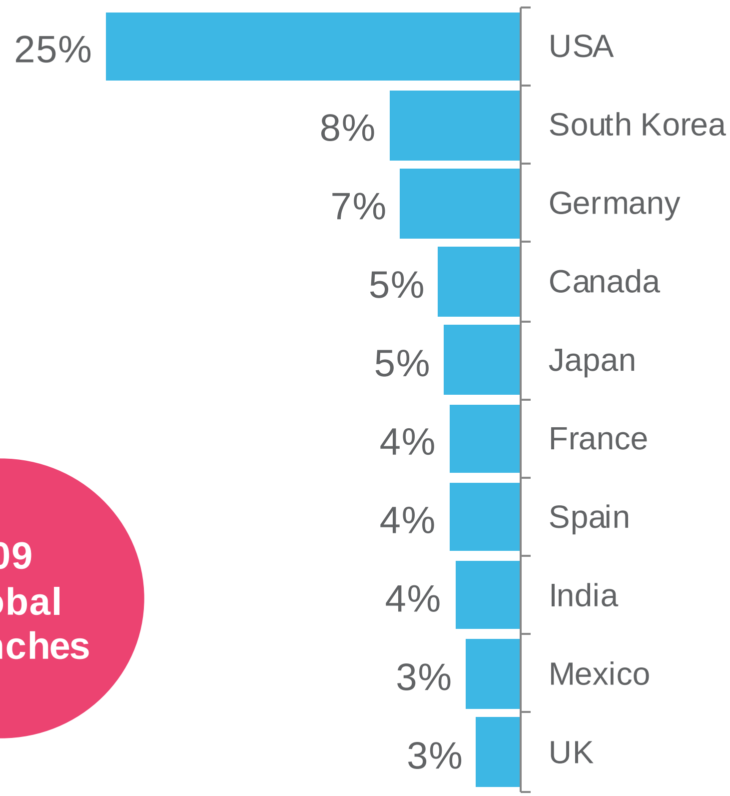
- There were 326 products launched in the last 3 months globally that contained sweet corn as an ingredient. This was consistent with previous trends.
- There were five products launched in Australia over the past three months.
- Consistent with previous months, Europe (29%), North America (29%) and Asia Pacific (29%) were the key region for launches.
- Flexible packaging (41%) remained the most common format used for products.
- The main categories for launches were snacks (21%), meals (16%) and bakery goods (14%).
- Claims used on products highlighted convenience; microwaveable (20%) and ease of use (13%) and health; no additives/preservatives (19%) and environmentally friendly packaging (15%).
- The most innovative product launched was a sweetcorn and blackberry icecream in the USA. Examples of these can be found in the following pages.

Source: Mintel (2015)

The majority of launches occur in USA, with a large number also occurring across Asia Pacific.

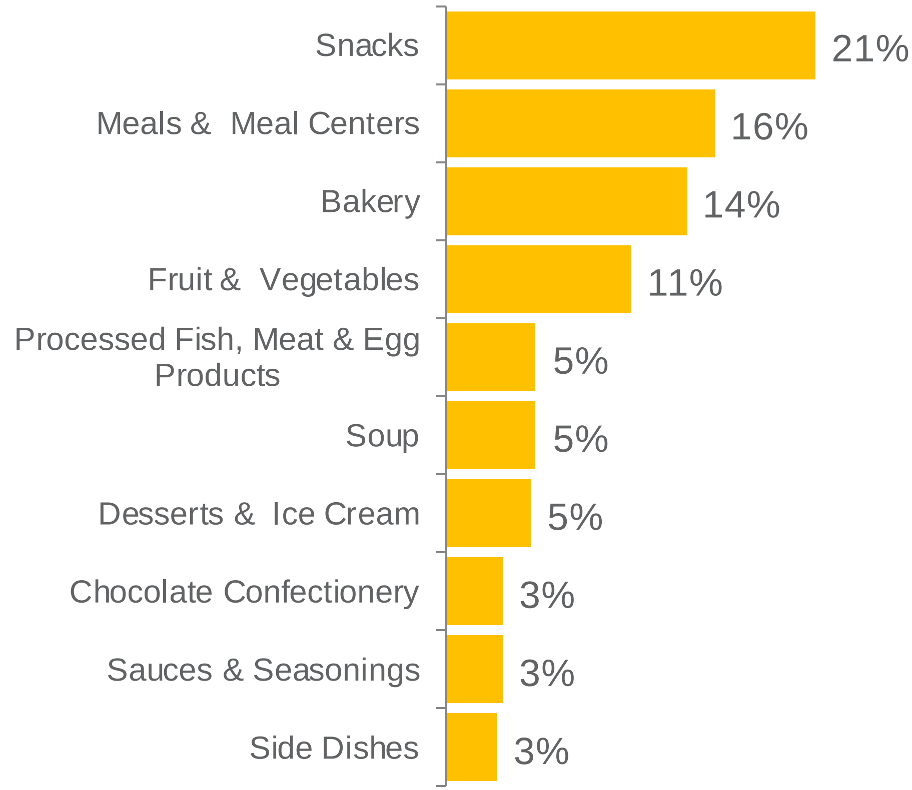
The key categories for corn launches are meals, snacks and bakery items.

Top Launch Countries



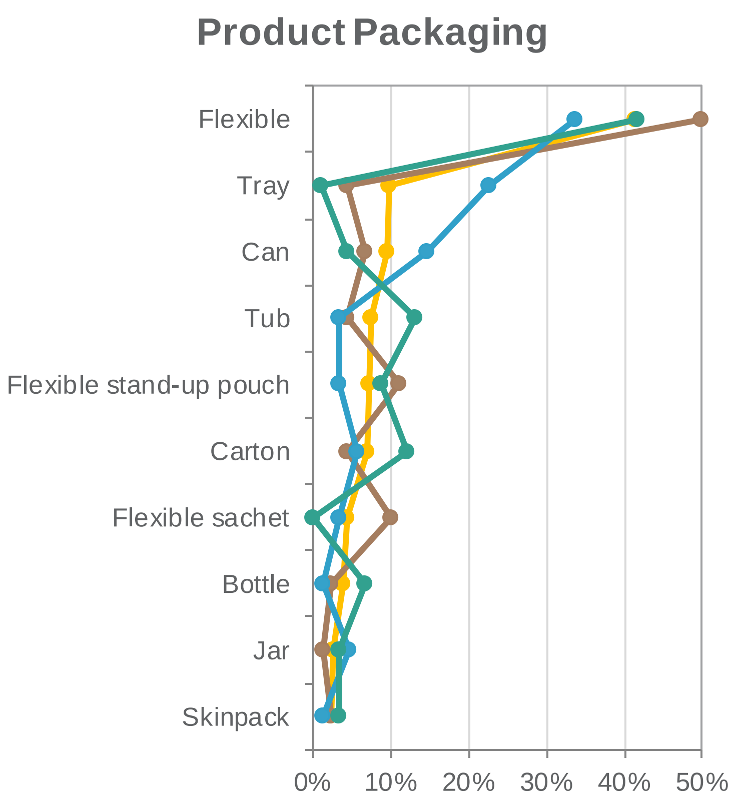
309 Global Launches

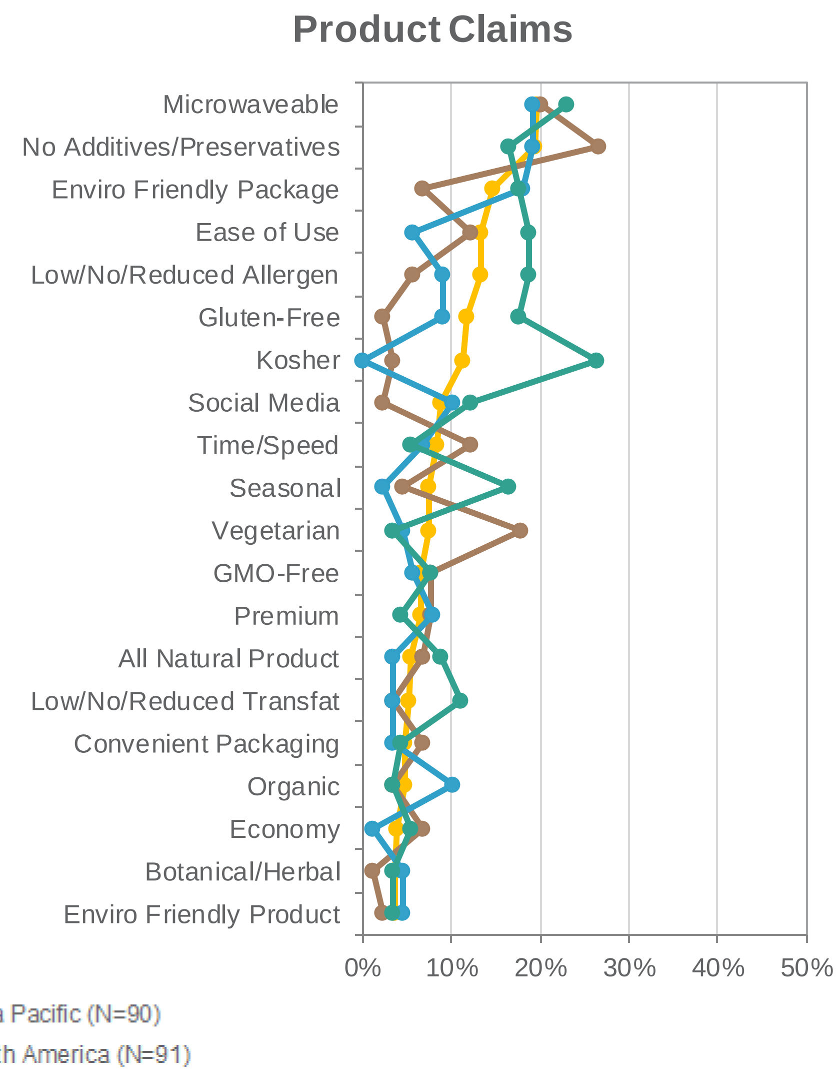
Top Launch Categories



There is a large degree of variation in claims used globally. North America was more likely to launch products with health claims such as low allergen and gluten free, as well as kosher, whilst Asia Pacific had more launches of no additives/preservatives and vegetarian.

Flexible packaging is primarily used for sweet corn products, consistent across regions. Europe was more likely to launch sweet corn products in trays and cans.





Only regions with n >30 are displayed

Innovative Sweet Corn Launches:

L3M (January – March 2015)

Steve's No. 83 Sweet Corn & Blackberry Preserves Ice Cream (USA)

Steve's No. 83 Sweet Corn & Blackberry Preserves Ice Cream is described as sweet corn ice cream swirled with blackberry preserves. This product is free from gluten and nuts, and retails in a 1-pint pack featuring the Facebook and Twitter logos. The manufacture is the member of the 1% For The Planet.

Claims:
Ethical - Charity, Gluten-Free, Social Media, Low/No/Reduced Allergen

Garden of Eatin' Chili & Lime Corn Tortilla Chips (Singapore)

Garden of Eatin' Chili & Lime Corn Tortilla Chips are made with organic white corn. This product is described as mouth-watering chips that feature a delectable blend of natural lime flavor, a dash of chili spice, paprika and other delicious seasonings. It is made with organic whole corn kernels and expeller-pressed oils, and is free from GMO, hydrogenated oil, artificial flavours, colours or preservatives and gluten. This kosher certified product retails in a 229g pack.

Claims:
No Additives/Preservatives, Low/No/Reduced Allergen, GMO-Free, Organic, Kosher, Ethical - Environmentally Friendly Product, Gluten-Free, Low/No/Reduced Transfat, Wholegrain

Liparty Charming Organic Vegetarian Flake (South Korea)

Liparty Charming Organic Vegetarian Flake is made with 95.77% organic ingredients, which are selected nutritious five organic whole grains and 4% vegetable powder. This crunchy product is baked instead of fried and is said to be an ideal snack for families. It can be consumed with milk, soy milk or yogurt using a spoon. It retails in a 30g pack.

Claims:
Organic, Vegetarian, Wholegrain

Aeon Topvalu Select Corn Cream Potage (Japan)

Aeon Topvalu Select Corn Cream Potage has been repackaged. It is made with GMO-free Super Sweet Corn and vegetables. The product can be prepared in the microwave, and retails in 900g pack.

Claims:
Cobranded, GMO-Free, Economy, Microwaveable

Source: Mintel (2015)

Innovative Sweet Corn Launches:
L3M (January – March 2015)

Sensible Foods Organic Sweet Corn Crunch Dried Snack (Hong Kong)

Sensible Foods Organic Sweet Corn Crunch Dried Snack has been repackaged in a newly designed 21g easy-to-open pack. The kosher certified product is described as a delicious and healthy snack that kids love. This all natural snack is low in fat, contains only 70 calories, and is free from gluten, added sugar, GMO, additives, preservatives, peanuts, wheat, eggs, and dairy. The USDA organic certified product is claimed to be naturally crunchy and is an award winning snack.

Claims:
No Additives/Preservatives, All Natural Product, Low/No/Reduced Allergen, Convenient Packaging, GMO-Free, Low/No/Reduced Calorie, Gluten-Free, Kosher, Low/No/Reduced Fat, Low/No/Reduced Sugar, Organic, Children (5-12)

Supa Corn Sweet Corn in a Cup with Chipotle Masala Flavour (India)

Supa Corn Sweet Corn in a Cup with Chipotle Masala Flavour is described as fresh and tasty, carefully cultivated in fertile farms, processed and packaged with Oxy Fresh technology so that they stay 100% natural without any preservatives. It is free from any added flavours and colours. The premium vegetarian product is ready to eat, microwaveable and retails in a 150g pack with a pack of Supa Zest Chipotle Masala taste enhancer included.

Claims:
No Additives/Preservatives, All Natural Product, Microwaveable, Ease of Use, Vegetarian, Premium

Crunch 'n Munch Sweet & Hot Popcorn with Peanuts (USA)

Crunch 'n Munch Sweet & Hot Popcorn with Peanuts is a limited edition product. This kosher certified popcorn contains 0g trans fat per serving, retails in a 6-oz. recyclable pack.

Claims:
Ethical - Environmentally Friendly Package, Low/No/Reduced Transfat, Kosher, Limited Edition

Frito Lay Doritos Dynamite Sweet Mustard Flavored Corn Cones (Ecuador)

Frito Lay Doritos Dinamita Pasabocas de Maíz en Forma de Rollitos con Sabor Artificial a Mostaza Dulce (Sweet Mustard Flavored Corn Cones) are now available. These rolled tortilla chips are described as crispy and tasty, and retail in a 42g pack.

Claims:
N/A

Source: Mintel (2015)

Innovative Sweet Corn Launches:
L3M (January – March 2015)

Alexia Italian Herb Corn with Sundried Tomatoes (USA)

Alexia Italian Herb Corn with Sundried Tomatoes comprises white and yellow super sweet corn and sundried Roma tomatoes with garlic, basil and oregano. The all natural steam-in-bag product is microwaveable and contains no GMO, artificial colors, preservatives, or trans fat. It is kosher certified and retails in a 12-oz. pack, that features the Facebook logo.

Claims:
No Additives/Preservatives, All Natural Product, GMO-Free, Kosher, Social Media, Microwaveable, Low/No/Reduced Transfat

Peacock Food Collection Cheddar Cheese & Caramel Gourmet Popcorn (Japan)

: Peacock Food Collection Chicago Original Style Cheddar Cheese & Caramel Mix Premium Gourmet Popcorn consists of two different flavours popcorn to provide rich cheddar cheese flavour and sweet caramel flavours. This premium product retails in a 70g resealable pack, bearing the HACCP logo.

Claims:
Convenient Packaging, Premium

So Natural Minute Corn on the Cob (USA)

So Natural Minute Corn on the Cob is all natural, free from GMO, gluten and cholesterol, and fresh packed with no added sodium. This ready to eat, microwaveable product is halal certified and retails in a 17.64-oz pack.

Claims:
Ease of Use, All Natural Product, Low/No/Reduced Allergen, Low/No/Reduced Cholesterol, GMO-Free, Microwaveable, Halal, Gluten-Free, Low/No/Reduced Sodium

Yum-a-Roo's Pea, Sweet Corn and Apple Organic Toddler Snacks (USA)

The product comprises 100% real veggies and fruits and no added salts, sugars or preservatives. This gluten and GMO-free product is kosher certified product is said to quickly dissolve into soft bites and is suitable for babies older than 12 months. The fruits and veggies used in this product have been harvested and quick dried to lock in the best essential nutrients and phytochemicals little ones need. The product is suitable for lunch boxes, picnics, road trips, playgrounds and airplanes.

Claims:
No Additives/Preservatives, Time/Speed, Low/No/Reduced Allergen, Convenient Packaging, GMO-Free, Gluten-Free, Kosher, Ethical - Environmentally Friendly Product, Low/No/Reduced Sugar, On-the-Go, Organic, Low/No/Reduced Sodium, Babies & Toddlers (0-4), Children (5-12)

Source: Mintel (2015)

Australian Sweet Corn Launches:
L3M (January – March 2015)

Woolworths Created with Jamie Creamy Seafood Chowder

Imperial Grain Garden Vegetable Brown Rice

Edgell Aussie Corn Kernels

Rafferty's Garden Sweet Corn, Pumpkin & Cranberry Fruit & Veggie Oaty Bars

Five Tastes Nasi Goreng Meal Kit

Source: Mintel (2015)

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In the Media.

General Vegetable News
(January – March 2015)

- Almost 100 south-east Queensland independent greengrocers have signed up to the 'Hand Picked' campaign, in which greengrocers will only sell locally grown food. It also aims to highlight their industry experience and the personal service provided by local fruit and vegetable shops.

www.foodmag.com.au

- The Australian peak industry body for vegetables, AUSVEG, with the State Minister's for Agriculture are developing a Country of Origin Labelling proposal. There is clear preference for a diagram to communicate Australian made content, as well as introducing new terminology to clearly communicate where products are grown and processed.

www.abc.net.au/news

Commodity News
(January – March 2015)

- A new variety of broccoli, Beneforte®, has been developed to actively reduce the levels of bad cholesterol by around 6%. The Beneforte® broccoli variety is currently available in British supermarkets.

www.hindustantimes.com

- The Trinidad Scorpion Butch T; developed in Australia, and once the hottest chilli in the world, has lost its title to the Carolina Reaper, which is now the hottest chilli in the world, grown in South Carolina, USA.

www.abc.net.au

- Prickly lettuce, a wild weed related to cultivated lettuce, could provide a viable source of natural rubber. The latex found in prickly lettuce was very similar to the substance found in natural rubber.

www.science20.com

- Corn Fest is a free music concert in Illinois, USA (being held August 28-30th 2015) that is run by a not-for-profit organisation providing food and entertainment. The Corn Fest started out in 1957 as a corn boil, giving away free corn at the start of the harvest season. From there it grew into a large scale festival with over 100,000 people turning out each year.

www.cornfest.com

Thanks.