Horticulture Innovation Australia and AUSVEG.

VG12078 Project Harvest.

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

Monthly Tracker Report Wave 23
Celery, Cucumber, Eggplant & Zucchini

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Horticulture Innovation Australia

colmar brunton.

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Wave 23:
Executive Summary

Industry Insight

In addition to tracking *how often* commodities are consumed, Project Harvest has enlightened us as to *when* they are consumed. Whilst findings suggest that the consumption of vegetables is largely limited to dinner time, there is significant growth in other occasions that can be capitalised upon.

The largest consumption occasion growth in Australia over the last decade has been snacking, which has increased by more than 400 per cent in terms of frequency, penetration and monetary value over that time. The consumer definition of snacking has also broadened, and now commonly includes beverages. Overall, key snacking influencers include busier Australian lifestyles displacing traditional meals due to a preference for more convenient and versatile, single serve items; increased snacking behaviour in older consumers; and the proliferation of snack products available both from global and local manufacturers.

Recent examples of successful snacking product developments are grain or nut-based bars, yoghurt in pouches, breakfast biscuits and the evolution of the juice bar.

Industry Insight cont.

In the future, the growth of the snacking occasion is forecast to continue based on a more fragmented style of daily consumption, the increasing size of the older population and a greater number of suitable product options available. This, along with a greater consumer expectation and knowledge regarding products that better meet health needs, means that vegetables are a prime candidate to capitalise on such growth.

So what can be done to make the most of this opportunity from an industry perspective? Well, it's all about solving modern day problems from a consumer perspective. Specifically, consumers' are demanding a quick, clean snack. It satisfies a need for between-meal sustenance, distraction or indulgence. It features packaging that retains the integrity of the snack and is easily accessed on the go. It has a substantial shelf-life and specific and relevant health credentials that enhance permissibility while reducing guilt.

Putting consumer needs at the forefront of new product development will ensure vegetables are well placed to take full advantage of the increasing snacking trend.

Fast Facts
(1 of 2)

Eggplant:

- Eggplant has low importance and satisfaction relative to the Harvest average, however holds strong levels of interest, endorsement and future purchase intent.
- Purchase and consumption are down from December, with consumption dropping from five occasions per month to just over four. Mainstream and specialist retailers are the main outlets for purchase.
- Consumers purchase 900g of eggplant per shop, which is in line with the previous wave. Recalled last spend is higher at $4.48 with value for money perceived as fair.
- Pricing analysis revealed the national average price for purple eggplant is $6.94 per kg in April, remaining relatively stable on December pricing.
- Unprompted awareness of eggplant types remains low, with two thirds of consumers unable to recall a type.
- Key influences to purchase are using as an ingredient in dishes, taste and adding variety to their vegetable selection. Key barriers to purchase are already consuming enough for their needs and wanting a greater variety of vegetables.
- Expected freshness is down on last wave, with eggplant expected to remain fresh for around 8 days. This freshness is generally met.

Celery:

- Celery continues to perform below average on the majority of category health and consumer sentiment measures. However, consumers indicate that they are satisfied with the range available.
- Celery was purchased three times per month and consumed on average nine occasions per month, both decreasing on the previous wave.
- Consumers prefer to purchase whole bunches of celery. Recalled last spend is $2.60, trending downward since Wave 15. Overall celery is perceived to be good value for money, up on Wave 19.
- Price tracking indicated the average price per bunch of celery in April was $2.27, experiencing a noticeable decline since the December 2014 Wave ($2.74).
- Spontaneous awareness of celery types remains very low, with 87% of respondents unable to state a type.
- Top triggers to purchase are to use as an ingredient in dishes, ease of use and health. Two in five consumers perceive that they consume enough for their needs.
- Consumers expect celery to remain fresh for almost ten days, improving over recent waves.

Fast Facts
(2 of 2)

Cucumber:

- Importance and endorsement of cucumber falls in line with the Harvest mean, however satisfaction sits higher with a strong future purchase intent.
- Cucumber purchase and consumption have stabilised after a peak in December 2014. Purchase is primarily made through mainstream retailers, with increases at Woolworths wave-on-wave.
- Weight of purchase returns to healthy levels after a decline last wave, with consumers purchasing on average 700g of Cucumber in April.
- Price tracking of Lebanese cucumbers reveals a national average of $5.37 per kg in April, continuing to fall in recent waves.
- Recall of cucumber types and varieties remains high with awareness of almost all varieties increasing. Lebanese and Continental types hold the greatest recall. Trend towards increasing awareness of Continental varieties is emerging.
- Cucumber is expected to stay fresh for just over a week, with expectations generally met.
- Key drivers of purchase are predominately influenced by taste and health, however both experienced a decline this wave. Barriers to purchase are short shelf life and the perception that consumers are eating enough for their needs.

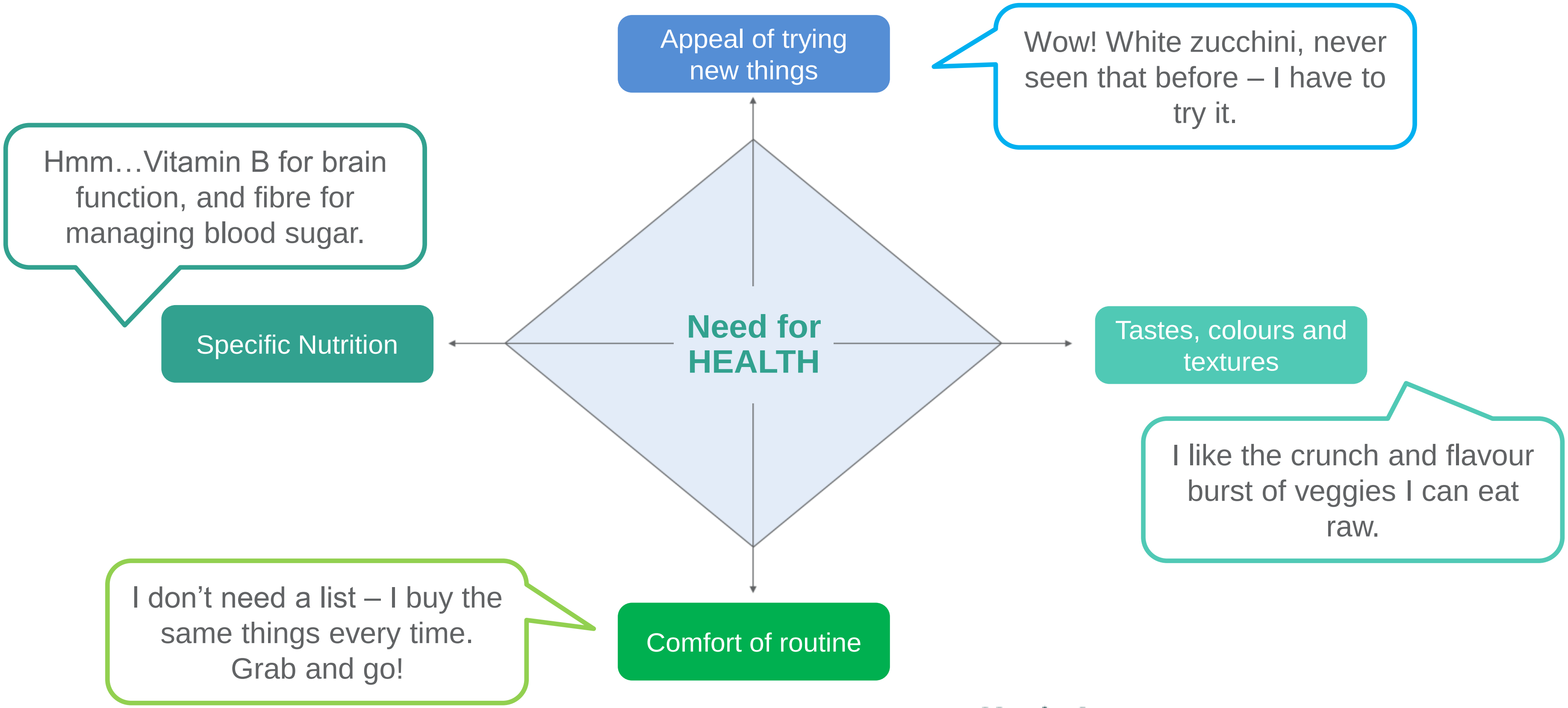
Zucchini:

- Zucchini continues to fall below the Harvest mean for perceived importance, however consumers remain satisfied with the current range available.
- Consumers' purchase and usage frequency continues to trend upwards in the current wave, with purchase averaging 4 times per month and consumption 8 times. Key retailers for zucchini purchase remain mainstream and specialist stores.
- Weight of purchase dropped slightly to 700g, while recalled last spend and value for money remain stable, with zucchinis believed to be good value for money.
- Zucchini national average price is notably lower at $4.09 per kg in April 2015 compared to December 2014 retail price ($5.32 per kg).
- Awareness of zucchini types remains very low, with three quarters of consumers unable to name a variety. Those who can are largely prompted by colour.
- Zucchini is expected to remain fresh for over a week, slightly higher than the previous wave, with expectations of freshness more likely to be met.
- Top triggers to purchase are ease of preparation, cooks quickly, and to use it as an ingredient in dishes. Consumers limit purchase of zucchini because they want variety in their diets.

Wave 23: 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

Eager Explorers: 30%

Are into anything new - new ideas, new tastes, new recipes, new ingredients.

Taste, colour and texture are motivating.

How they behave:

Alert in-store, looking for new ideas all the time, aware of new introductions and celebrity endorsed offers, seeking new flavours, ideas and experiences.

Be more relevant by:

Offering tastings and demonstrations on the spot to encourage trial.

Flavour Followers: 22%

Only buy what they know they like the taste of.

May be into trying new things, but it has to be similar to something they know they like the taste of.

How they behave:

Can be influenced by new packaging or formats of veggies they are familiar with, searching for flavours to go with their regular buys.

Be more relevant by:

Offering recipe ideas in-store to highlight the versatility of the veggies they know and enjoy.

Wholesome Habits: 26%

Eat veggies routinely/as habit, and are not looking for anything new.

Know they need to eat veggies for health, but only stick to what they know how to cook and what others they cook for will eat.

How they behave:

Very considered in-store, price and value sensitive, keen not to waste (so buy less), browse the same aisles each week.

Be more relevant by:

Offering more alternatives to their set menus, greater convenience and value options.

Conscious Improvers: 22%

Select veggies based on the nutritional benefit.

Motivated by a specific need or prevention (such as weight management, lowering cholesterol) or for significantly increasing general health.

How they behave:

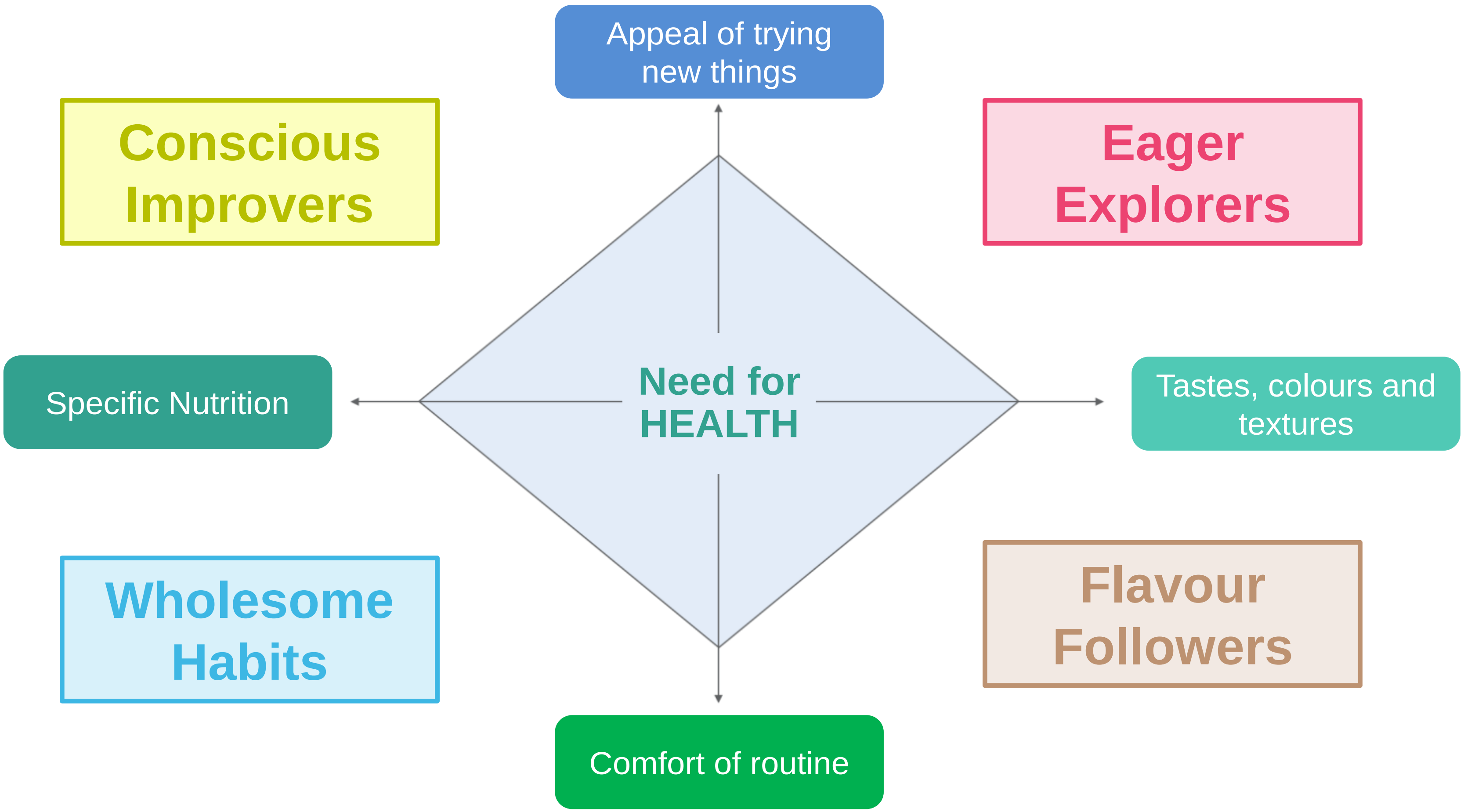
Willing to spend the time and money in-store to buy the best nutritional ingredients. Looking for new ways to offer the best of nutrition to their families, understand the importance of freshness.

Be more relevant by:

Providing specific nutritional information and health benefits like Recommended Daily Intake (RDI) in-store.

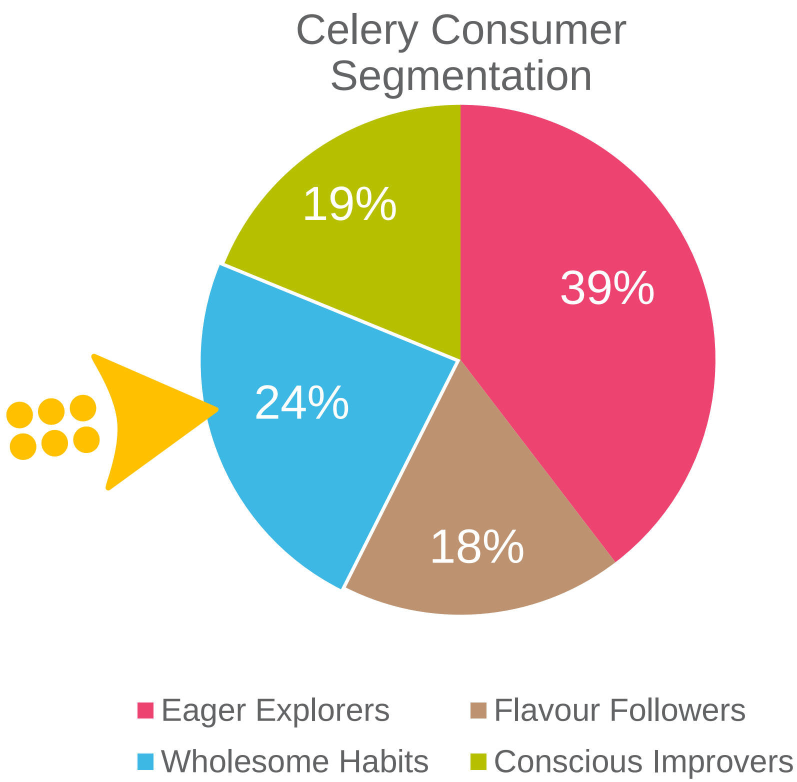
The segment names reflect behaviours and core needs

The segments are named to reflect behaviours and core needs



Celery Grower Action Plan

Target: Wholesome Habits Consumers



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

Be more relevant by:

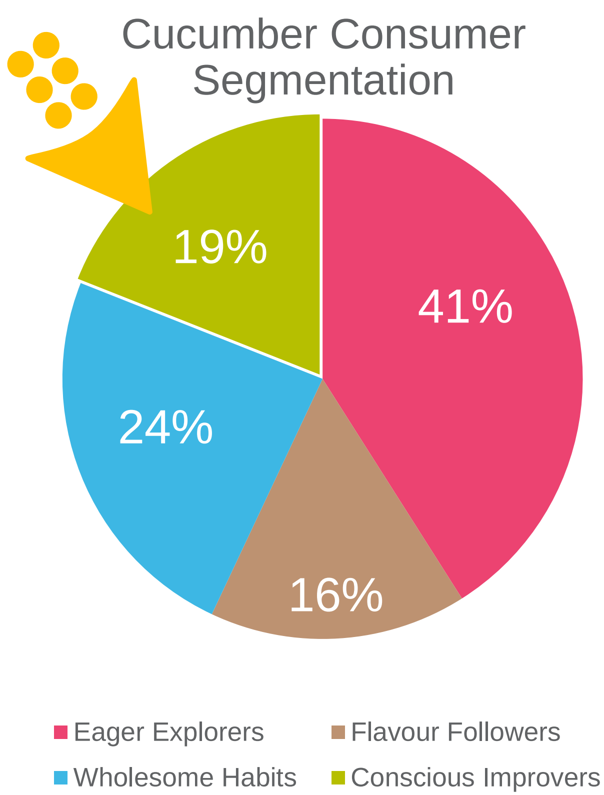
To encourage future purchase of celery, provide alternative meal occasions outside of dinner time, making the vegetable more relevant throughout the day. This may include lunch and snack size portions of celery. Formats need to convey value for money and ample servings.

These consumers are conscious of wastage, therefore highlight serving sizes on pack or in-store. Communicate peak season to consumers for freshness cues and longevity once purchased.

**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.*

Cucumber Grower Action Plan

Target: Conscious Improver Consumers



Your vegetable noticeably appeals to the **Conscious Improver** consumers. Whilst this is not the largest segment, they are motivated to purchase cucumber and are influenced by their nutritional benefits.

Be more relevant by:

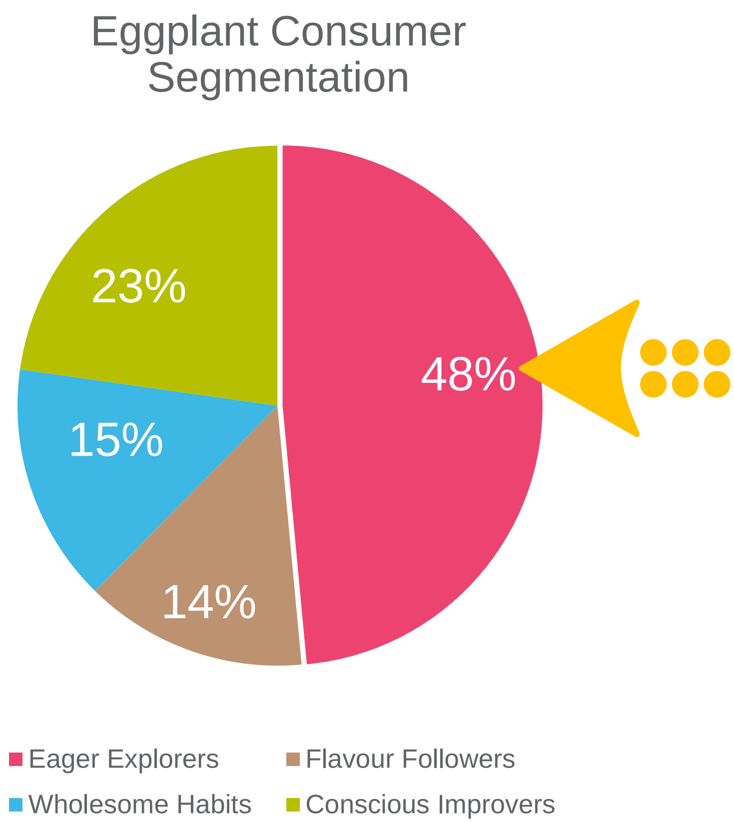
Differentiate the multiple types of cucumber types by specific health benefits, what are the benefits of each type. Nutritional call outs could include; naturally low in calories, cholesterol and sodium.

Snack formats may also appeal to these consumers as a healthy on-the-go snack. Investigate packaging with dips, with gluten free products on the rise, promote cucumber as the cracker alternative.

**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.*

Eggplant Grower Action Plan

Target: Eager Explorer Consumers



Nearly half of consumers who purchase your vegetable are **Eager Explorer** consumers. These consumers are motivated by taste, colour and texture of eggplant. They are looking for new recipes and cooking styles.

Be more relevant by:

Promote the alternative types of eggplant to these consumers, such as white, striped or cylindrical types. Identify the flavour differences of these types of eggplants and which are best suited for cooking cuisines, such as European and Asian. This could be communicated on pack or in-store with the addition of recipe cards.

Provide taste demonstrations in-store to encourage trial and set flavour expectations before the consumer cooks with the eggplant.

**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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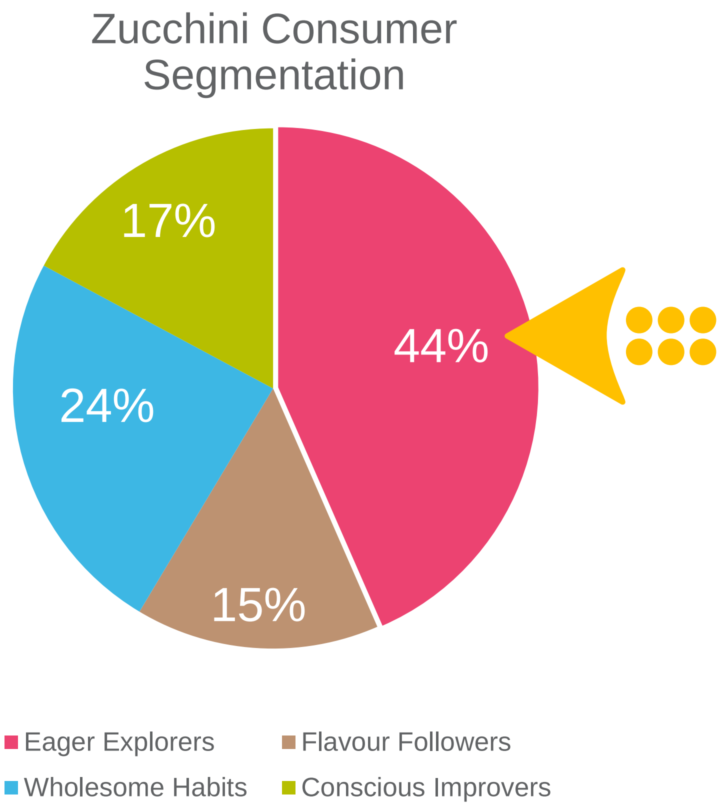
Zucchini Grower Action Plan

Target: Eager Explorer Consumers



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

Be more relevant by:
These consumers are more open to experimentation and are more likely to spend on fresh vegetables. Attract them with in-store displays that are colourful and promote freshness and quality.

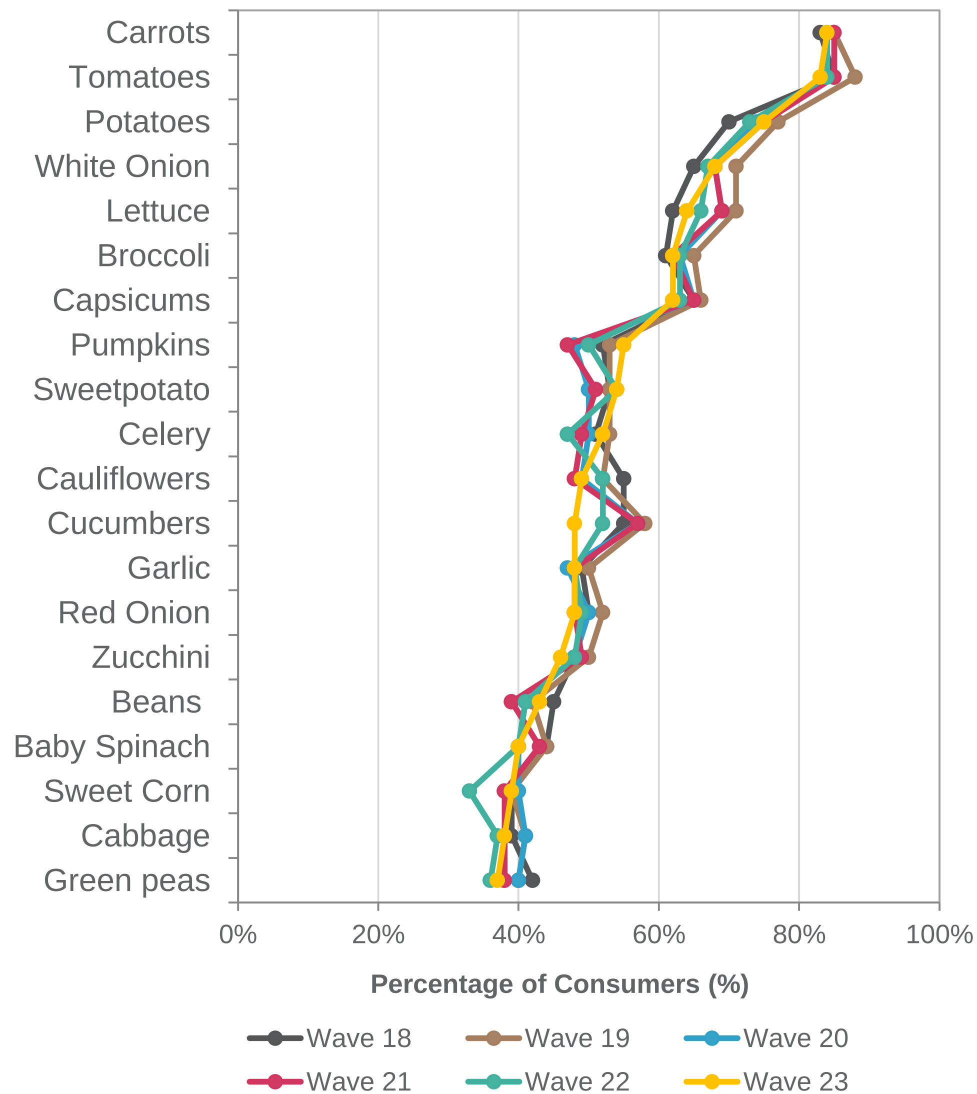
These consumers are perfect targets for multiple types of zucchini, such as yellow, white or cylindrical varieties and even zucchini flowers. Clearly communicate the flavour profiles of the different types and provide suitable cooking recipe ideas for consumers to trial in their cooking.

**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 23: Overall Vegetable Tracking

Vegetables Purchased Last Month

- Carrots, tomatoes, potatoes and onion are the most purchased vegetables in April 2015.
- This month sees an increase in pumpkin and sweetpotato purchases, and a decline in cucumbers. This change in purchasing is likely due to changes in seasonality.



Sample Wave 23, N=1785
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**?

Celery, cucumber and zucchini all have high levels of satisfaction this month. Purchase frequency looks to remain stable in the future for these vegetables.

Eggplant has low importance and satisfaction relative to the Harvest average. To continue strong future purchase intent, reasons behind dissatisfaction should be further investigated.

	Eggplant	Celery	Cucumber	Zucchini	Harvest Total Mean
Importance	5.7	5.6	6.1	6.0	6.2
Satisfaction	6.3	6.9	6.9	6.8	6.6
Endorsement	7.0	6.5	6.7	6.9	6.8
Interest (New Types)	6.3	5.1	5.8	5.9	6.1
Future Purchase					
More	27%	8%	11%	9%	14%
Same	69%	89%	88%	90%	84%
Less	4%	2%	1%	1%	2%

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

Celery.

Consumers purchase celery around three times per month. Celery is consumed on average 9.0 times per month, lower than the previous wave.

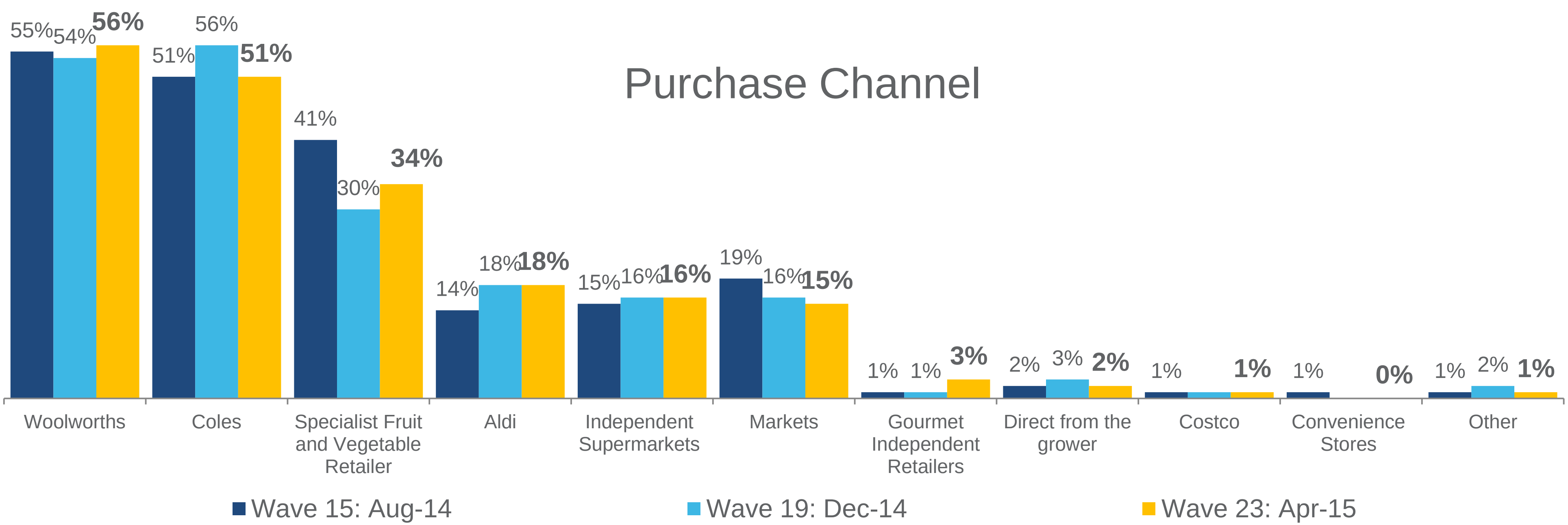
Purchase from mainstream retailer Woolworths has increased, taking top spot from Coles. Additionally, purchase from Aldi and independent supermarkets remains stable.

Average Purchase **2.9** times per month

- 2.9 times, Wave 15
- ▲ 3.0 times, Wave 19

Average Consumption **9.0** times per month

- ▲ 9.4 times, Wave 15
- ▲ 9.7 times, Wave 19



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 15 N=334, Wave 19 N=358, Wave 23 N=310

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

Average Spend and Price Sensitivity

Average weight of purchase

The average consumer typically purchased **800g** of Celery in April 2015, which was the same as the previous wave, but lower than Wave 15.

▲ 900g, Wave 15
▬ 800g, Wave 19

Recalled last spend

The average recalled last spend on Celery was **$2.60**, experiencing a small decline since the previous wave.

▲ $2.80, Wave 15
▲ $2.70, Wave 19

Value for money

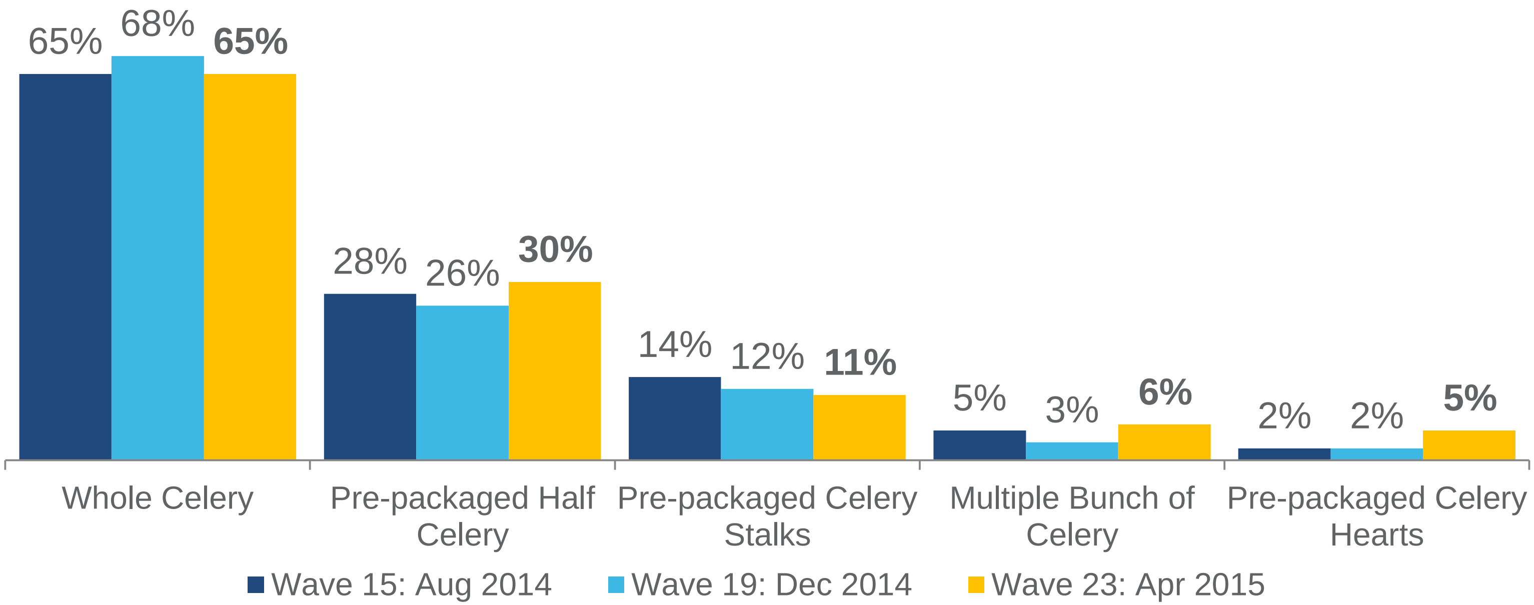
On average, consumers perceive Celery to be good value for money **(6.5/10)**, which increased from the previous wave, and lower than Wave 15.

▲ 6.6/10, Wave 15
▼ 6.3/10, Wave 19

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 15 N=334, Wave 19 N=358, Wave 23 N=310

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

There is a trend towards the purchase of pre-packaged half celery, with a decline in whole formats. On average consumers purchase one unit per shop.

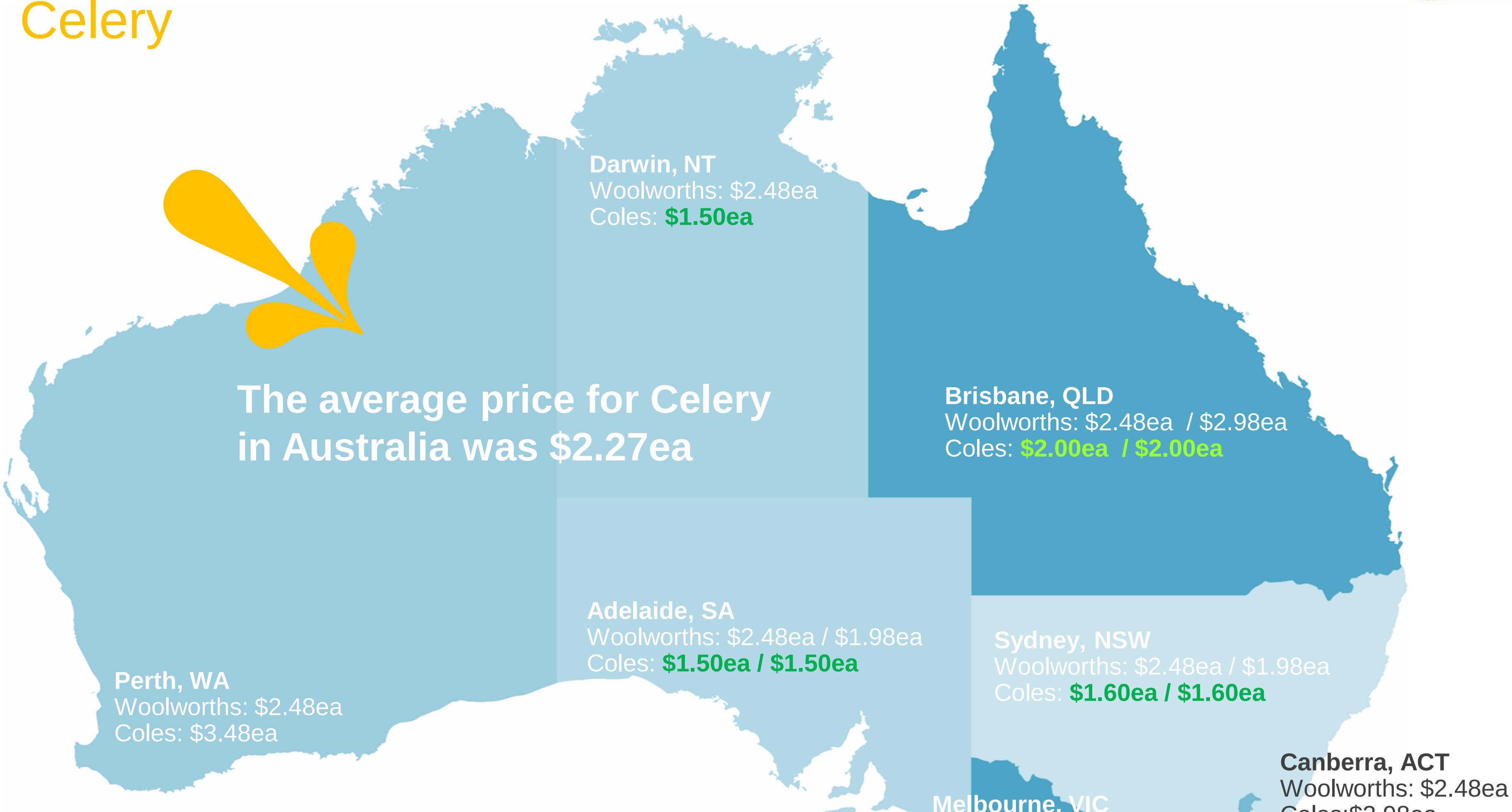


	Whole Bunch	Half Bunch	Pre-packed Stalks	Multi-bunch	Celery Hearts
Wave 15	1.3	1.3	2.6	1.9	2.6
Wave 19	1.1	1.1	1.7	1.2	1.7
Wave 23	1.1	1.1	1.3	1.3	1.3

Q3a. How much <commodity> does this typically equate to?
Sample Wave 15 N=334, Wave 19 N=358, Wave 23 N=310

Online and In-store Commodity Prices

Celery



- The national average has slightly declined from the previous wave ($2.74 per unit in December 2014) at $2.27 per unit in April 2015.
- There was promotional pricing in Sydney, Adelaide, Darwin and Hobart with $1.50 per unit. The highest price for celery was in Perth at $3.48 per unit.
- The retail price range was $1.98 per unit.

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

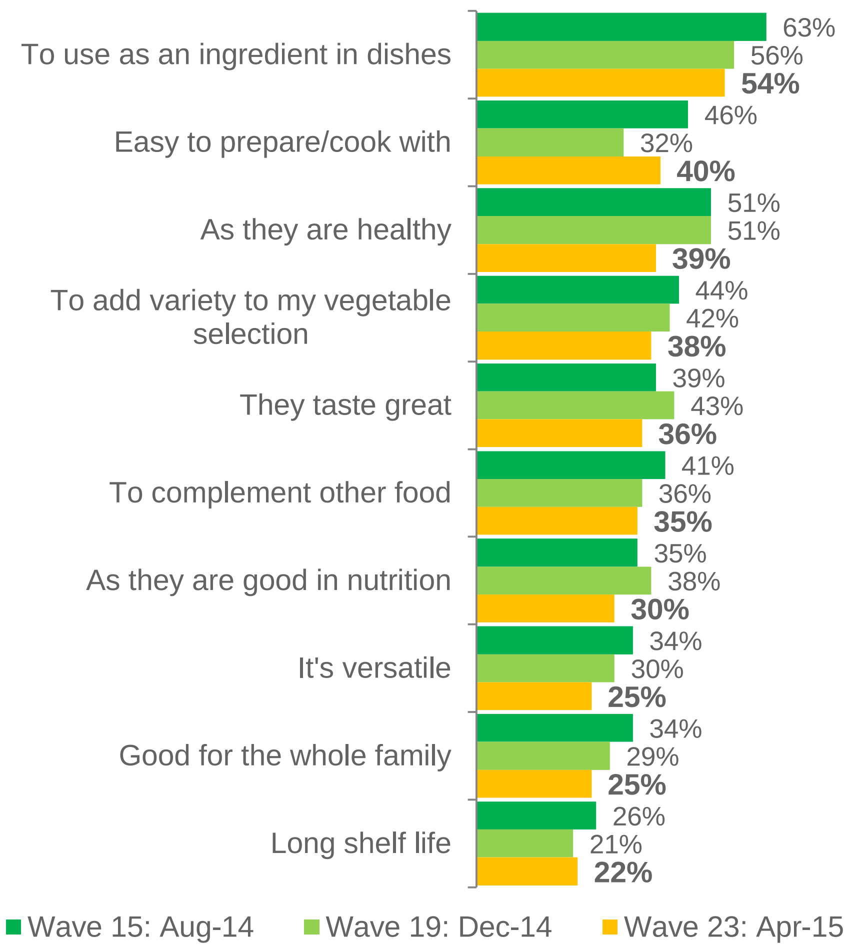
Spontaneous awareness of celery varieties remains very low, decreasing from the previous wave with 82% of consumers unable to recall a type.

- Consumers who stated a type of celery recall the ‘normal’ one and ‘green’ types.
- Many also confused celery with celeriac.

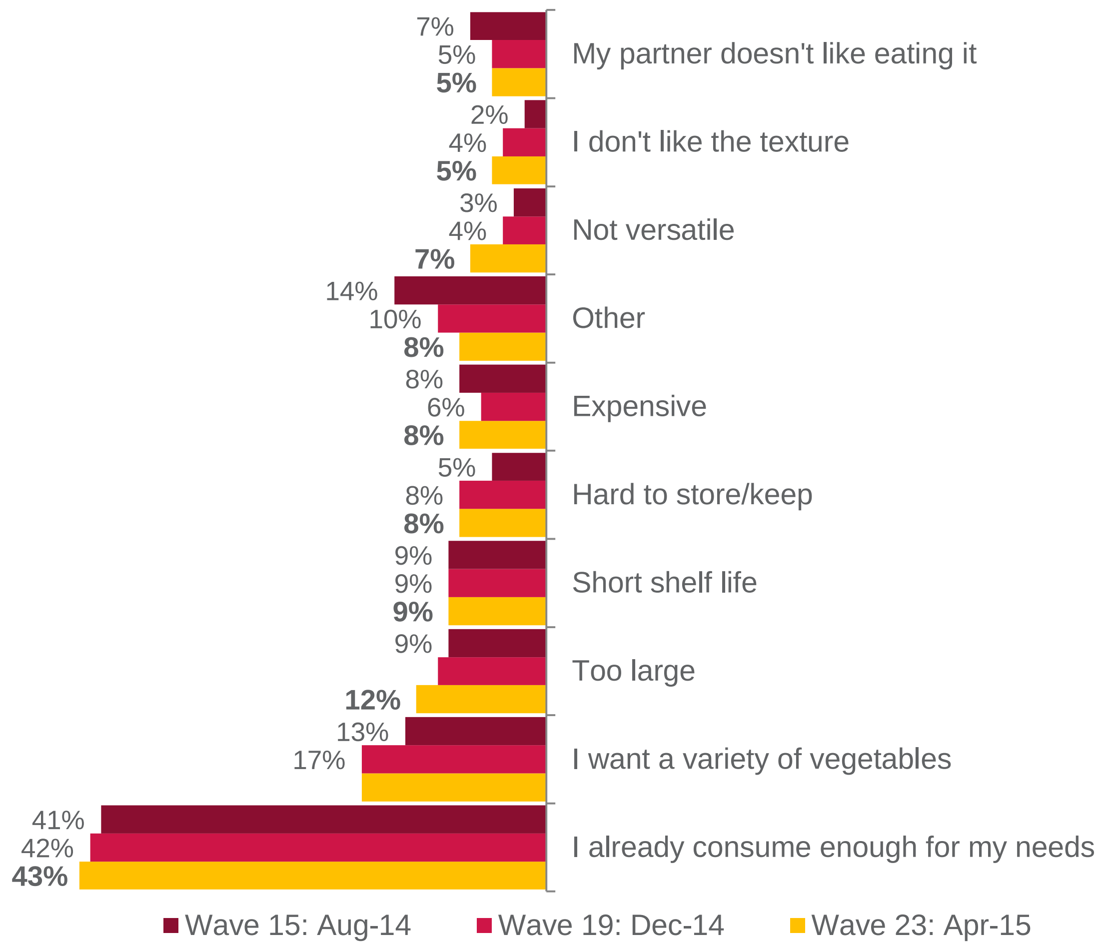
Q6a. What varieties of <commodity> are you aware of? (unprompted)
Sample Wave 15 N=334, Wave 19 N=358, Wave 23 N=310

There is an overall decline in triggers to purchase this month, however its ease of preparation and use as an ingredient in dishes are key influences on purchase. The main barriers to purchase are that people are already consuming enough for their needs, with short shelf life remaining constant over the last three waves.

Triggers



Barriers



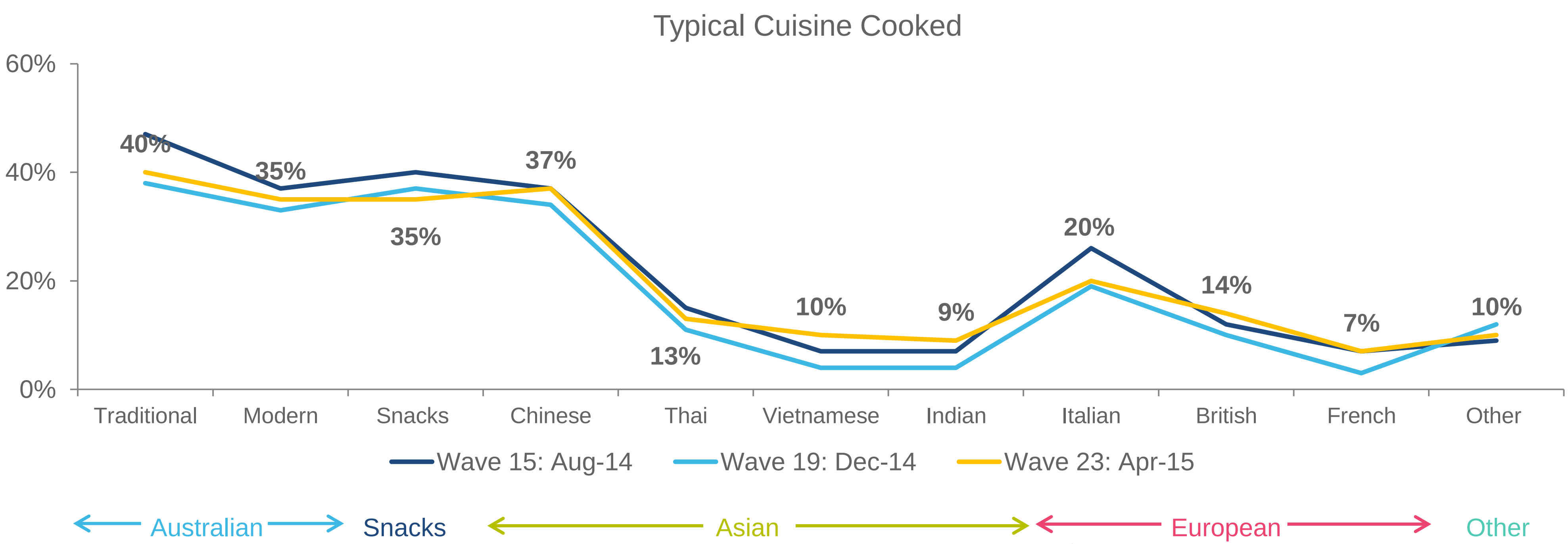
Sample Wave 15 N=334, Wave 19 N=358, Wave 23 N=310
Q7. Which of the following reasons best describes why you purchase <commodity> ?
Q8. Which reason best describes why you don't buy <commodity> more often?

Despite experiencing notable declines from the previous wave, Australian cuisine remains the most popular choice for cooking celery. Snacks and Chinese cuisine are also frequently cooked/prepared.

Weekday dinner and family meals are the main celery consumption occasions.

Top 5 Consumption Occasions

	Wave 23	Wave 19	Wave 15
Weekday Dinner	**42%**	41%	41%
Family meals	**39%**	32%	34%
Every-day meals	**34%**	30%	29%
Quick Meals	**33%**	28%	29%
Weekend Dinner	**29%**	25%	29%



Sample Wave 15 N=334, Wave 19 N=358, Wave 23 N=310
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.

Celery is generally served with carrots, tomatoes and capsicums. Tomatoes continue to decline, whilst lettuce also experienced a decline as an accompanying vegetable most likely due to change in season.

Cooking styles have experienced strong seasonal influences with two thirds of consumers eating celery raw, while soups are on the rise.

Accompanying Vegetables

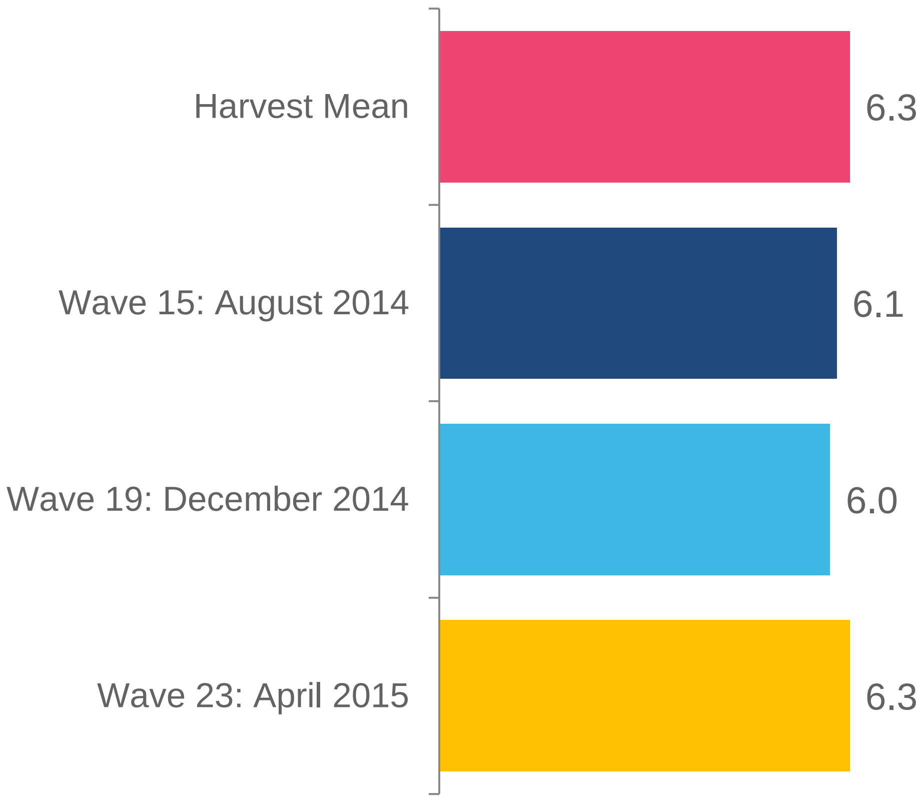
Carrot	68% ▲
Tomato	46% ▼
Capsicum	41% ▼
Onion	39% ▲
Lettuce	29% ▼

Top Cooking Styles

	Wave 15	Wave 19	Wave 23
Raw	60%	68%	62%
Stir frying	52%	47%	49%
Soup	56%	35%	46%
Stewing	37%	25%	31%
Sautéing	14%	11%	14%
Steaming	10%	6%	8%
Boiling	6%	6%	7%
Other	6%	7%	6%
Shallow Frying	6%	7%	5%
Mince	7%	4%	5%

Sample Wave 15 N=334, Wave 19 N=358, Wave 23 N=310
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?

Wave 23 sees importance of provenance increase, which is in line with the Harvest mean.



Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 15 N=334, Wave 19 N=358, Wave 23 N=310

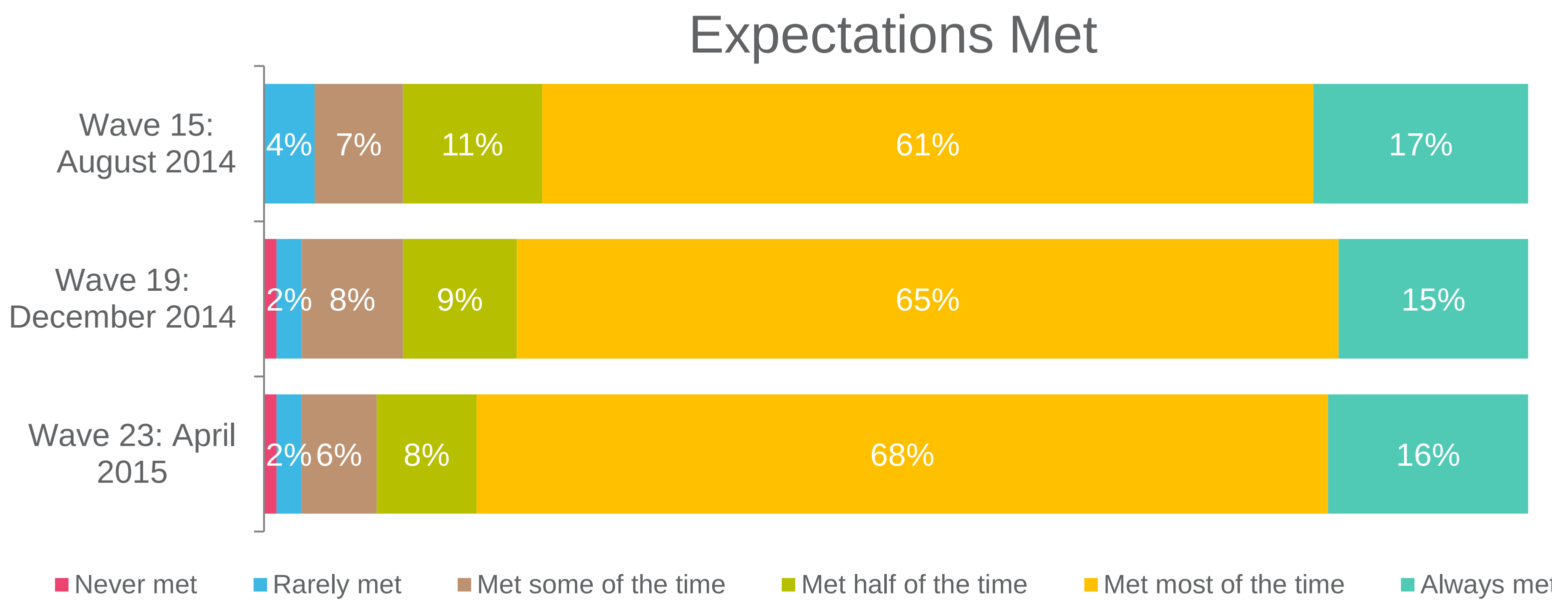
Consumers expect celery to remain fresh for over a week once purchased, which is slightly above the previous two waves.

Expectations of freshness are generally met most of the time, an improvement over previous waves.

Expected to stay fresh for **9.9** days

▼ 9.7 days, Wave 15

▼ 9.5 days, Wave 19



Sample Wave 15 N=334, Wave 19 N=358, Wave 23 N=310
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> ?

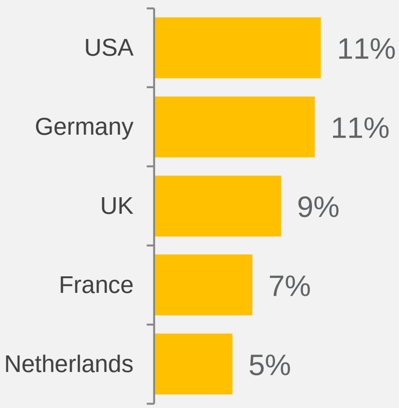
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Trends: Celery

Celery Global NPDs
February – April 2015

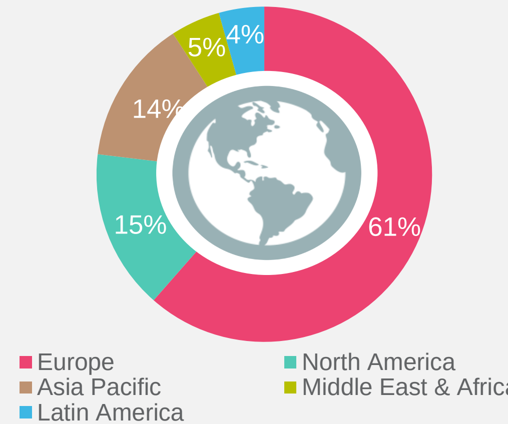
There were 1191 products containing celery launches in the past three months. Launches primarily occurred in Europe, in particular Germany and the UK. Categories for launch were meals, sauces and soup.

Country

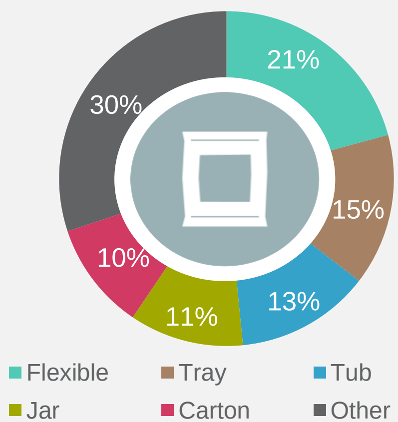


1191 Global Launches

Region



Top Pack Formats



Categories

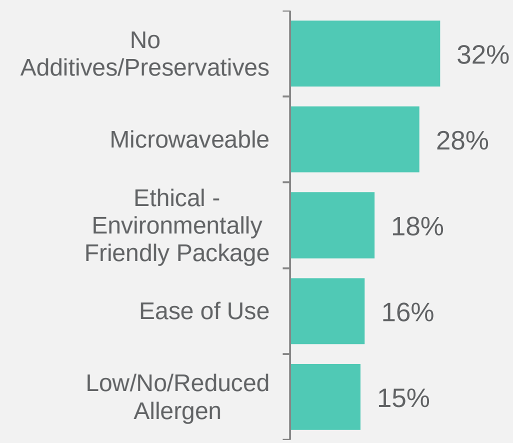
Meals 23%

Sauces 21%

Soup 17%

Processed Products 14%

Top Claims



Celery Product Launches:
Last 3 Months (February – April 2015)

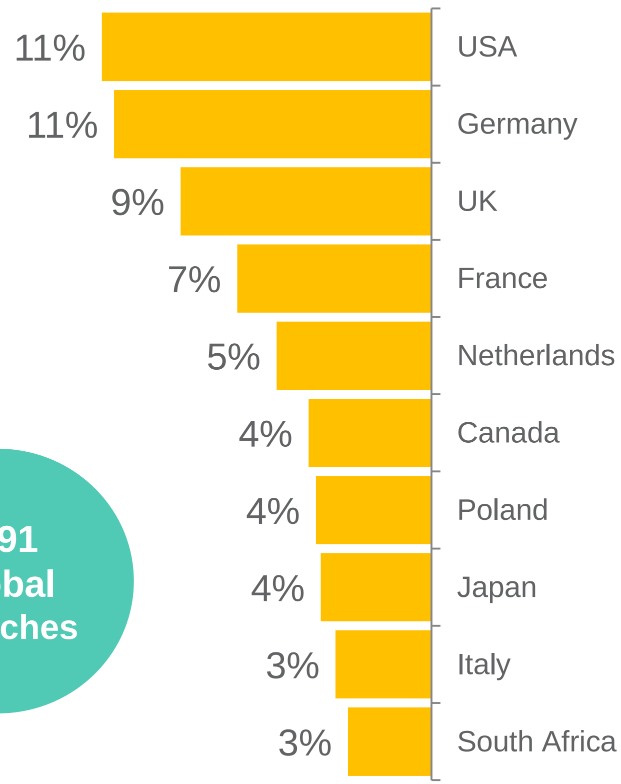
- Consistent with previous trends, a large number of products (N=1191) containing celery as an ingredient were launched globally in the last three months.
- There were 15 products launched in Australia, which was consistent with the previous wave. Products ranged from stock, soup and sauces.
- The majority of launches occurred in Europe (61%). Key countries for launch were the USA and Germany.
- Flexible packaging (21%) and trays (15%) were the main packaging types used for products.
- Meals (23%), sauces and seasoning (21%) and soups (17%) were the main categories for launches, consistent with previous trends.
- Core claims used were no additives or preservatives (32%) and microwavable (28%).
- Examples of the most innovative launches can be found on the following pages.

Source: Mintel (2015)

Celery Launches

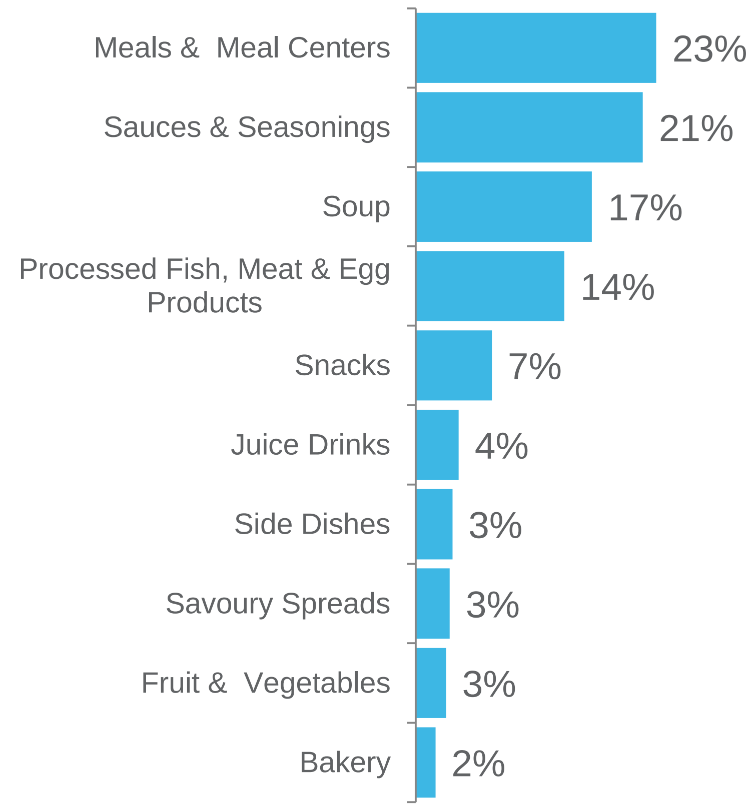
- USA and Germany continue to produce the greatest number of products containing celery.
- Meals, sauces, soup and processed products are the main categories for products launched.

Top Launch Countries



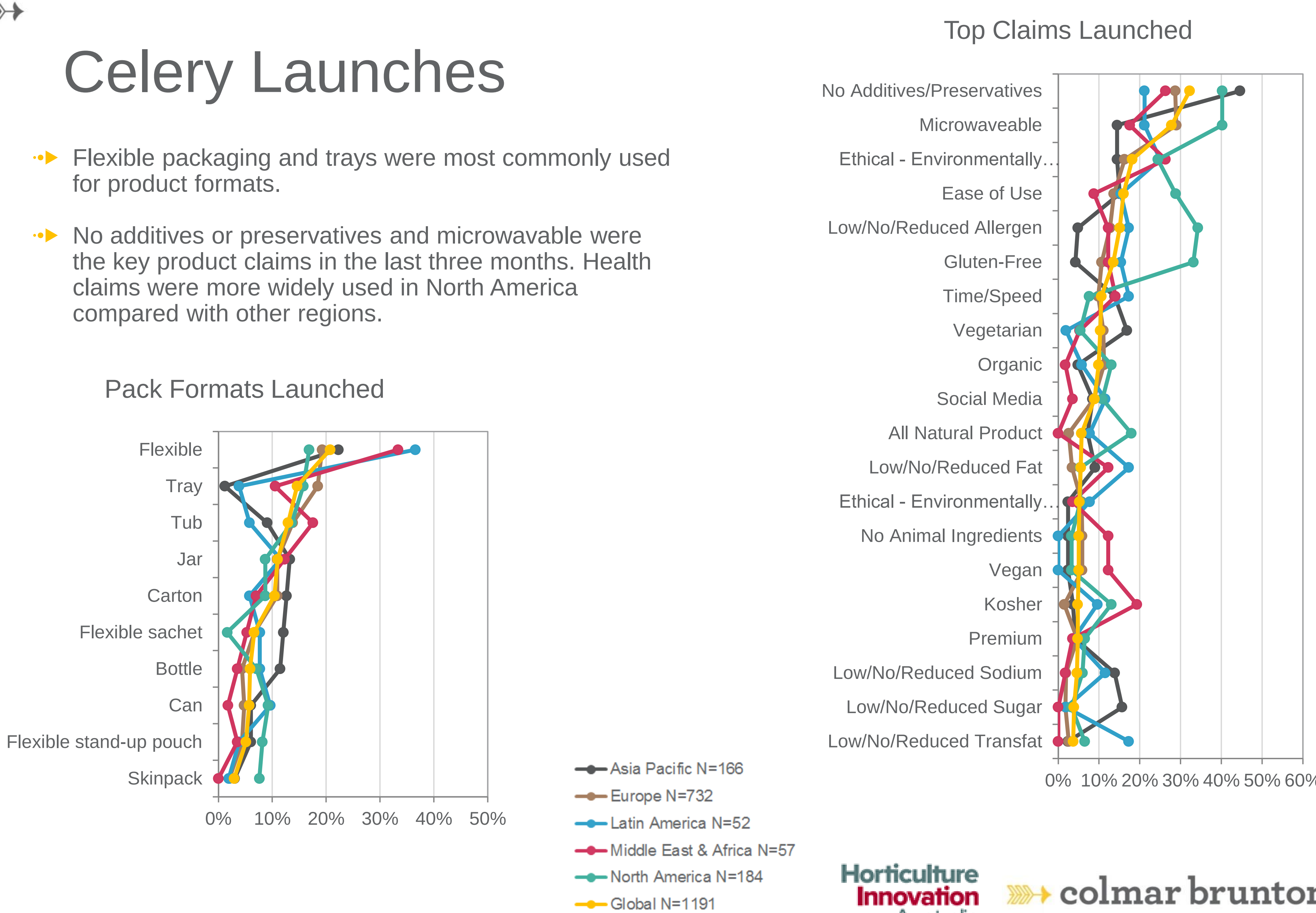
1191 Global Launches

Top Launch Categories



Celery Launches

- Flexible packaging and trays were most commonly used for product formats.
- No additives or preservatives and microwavable were the key product claims in the last three months. Health claims were more widely used in North America compared with other regions.



Innovative Celery Launches:
L3M (February – April 2015)

Watmuff & Beckett Nearly Ready Perfect Pea & Fresh Mint Soup (UK)

Watmuff & Beckett Nearly Ready Perfect Pea & Fresh Mint Soup has been repackaged, and now retails in a newly designed 600g pack featuring the Red Tractor Assured Food Standards, Twitter and Facebook logos. This simple and refreshing product is made with natural ingredients, can be heated in the microwave, and contains no dairy, gluten or wheat.

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

Heinersdorfer Spinach & Salmon Puff Pastries (Germany)

Heinersdorfer Appetit Häppchen Lachs-Spinat (Spinach & Salmon Puff Pastries) are filled with salmon and spinach. The product retails in a newly designed 300g pack containing 15 x 20g units.

Claims:
N/A

Olea Europaea Tomato & Vegetables Pasta Sauce (India)

Olea Europaea Tomato & Vegetables Pasta Sauce is suitable for vegetarians. The product retails in a 290g jar.

Claims:
Vegetarian

Love Smoothies Broccoli & the Beast Frozen Veg & Fruit Mix (UK)

Love Smoothies Broccoli & the Beast Frozen Veg & Fruit Mix is now available. It is made with 100% fruit and vegetables and nothing else, and comprises broccoli, mango, spinach, pineapple, banana and celery. It is high in vitamin C, and is free from added colours, wheat, preservatives, artificial flavours and gluten. The product is suitable for vegetarians.

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

Source: Mintel (2015)

Innovative Celery Launches:
L3M (February – April 2015)

Atlantic Kitchen Super-Greens Minestrone with Sea Spaghetti (UK)

Atlantic Kitchen Super-Greens Minestrone with Sea Spaghetti Seaweed is now available. This microwaveable product is boosted with superfood seaweed, which is rich in iodine, is described as a flavoursome, filling bowlful of spinach, lentils and wild sea spaghetti, is free from dairy and gluten, and is good for a healthy metabolism.

Claims:
Low/No/Reduced Allergen, High Protein, Other (Functional), Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Microwaveable, Ease of Use, Gluten-Free

Granny's Secret Homemade 100% Beetroot, Carrot and Celery Juice (UK)

Granny's Secret Homemade 100% Beetroot, Carrot and Celery Juice is now available. The product contains two pieces of beetroot, eight carrots and two pieces of celery and no added sugar. It is said to be an excellent alternative to fresh fruit and vegetables and is prepared following traditional recipes, without preservatives, artificial colours or aromas.

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

Uni-President Unif Fresh 40% Mixed Fruit and Green Veggie Juice (Malaysia)

Uni-President Unif Fresh 40% Mixed Fruit and Green Veggie Juice is said to be delight and delicious. The halal certified product is high in vitamin A, C and is free from preservatives, and artificial colour added. It retails in a 6 x 250ml pack.

Claims:
Halal, No Additives/Preservatives

GoodFoods Cranberry Almond Chicken Salad (Canada)

GoodFoods Cranberry Almond Chicken Salad is now available. This gluten-free salad comprises white meat, dried cranberries and roasted almonds in a poppy seed low-fat Greek yogurt dressing, is fully cooked and ready to serve and claims to be full of goodness.

Claims:
Low/No/Reduced Allergen, Low/No/Reduced Fat, On-the-Go, Ease of Use, Gluten-Free, Social Media

Source: Mintel (2015)

Innovative Celery Launches:
L3M (February – April 2015)

Daylesford Organic Celery Salt (UK)

Daylesford Organic Celery Salt has been relaunched. Previously sold under the brand Daylesford Organic, the product retails in a newly designed 95g pack featuring the EU Green Leaf and the Organic Soil Association logos.

Claims:
Organic

Nordgut Cheese Spread with Herbs (Germany)

Nordgut Kräuter Rahmstufe (Cheese Spread with Herbs) is a creamy processed cheese spread with herbs, that can be used to refine sauces and oven bakes. It features a 50% fat content and is free from GMO and gluten. This product retails in a 200g pack.

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

Fjordland i Skål Meat Cakes with Cabbage Mash and Potatoes (Norway)

Fjordland i Skål Kjøttkaker med Kålstuing og Poteter (Meat Cakes with Cabbage Mash and Potatoes) has been relaunched under a new brand name, which was previously known as Fjordland Express, features a new recipe and is now available in a redesigned 491g pack.

Claims:
Ease of Use, Ethical - Environmentally Friendly Package, Time/Speed, Microwaveable

Scratch. Chicken Chow Mein Stir Fry with Vegetables & Noodles (UK)

Deshome Aloe Vera Paste contains aloe pulp, and is said to be ideal for noodles, rice and vegetable dishes. The vegan product is free from preservatives and retails in a 180g pack.

Claims:
Ease of Use, Ethical - Environmentally Friendly Package, Time/Speed

Source: Mintel (2015)

Australian Celery Launches:
L3M (February – April 2015)

Salt Meats Cheese Our Nonna's Secret Recipe Chorizo Sauce

Simmone Logue Fine Food Beef Cocktail Pies

Woolworths Created with Jamie Cheeky Cauliflower Cheese Soup

The Salad Servers Chickpeas with Roast Pumpkin Salad

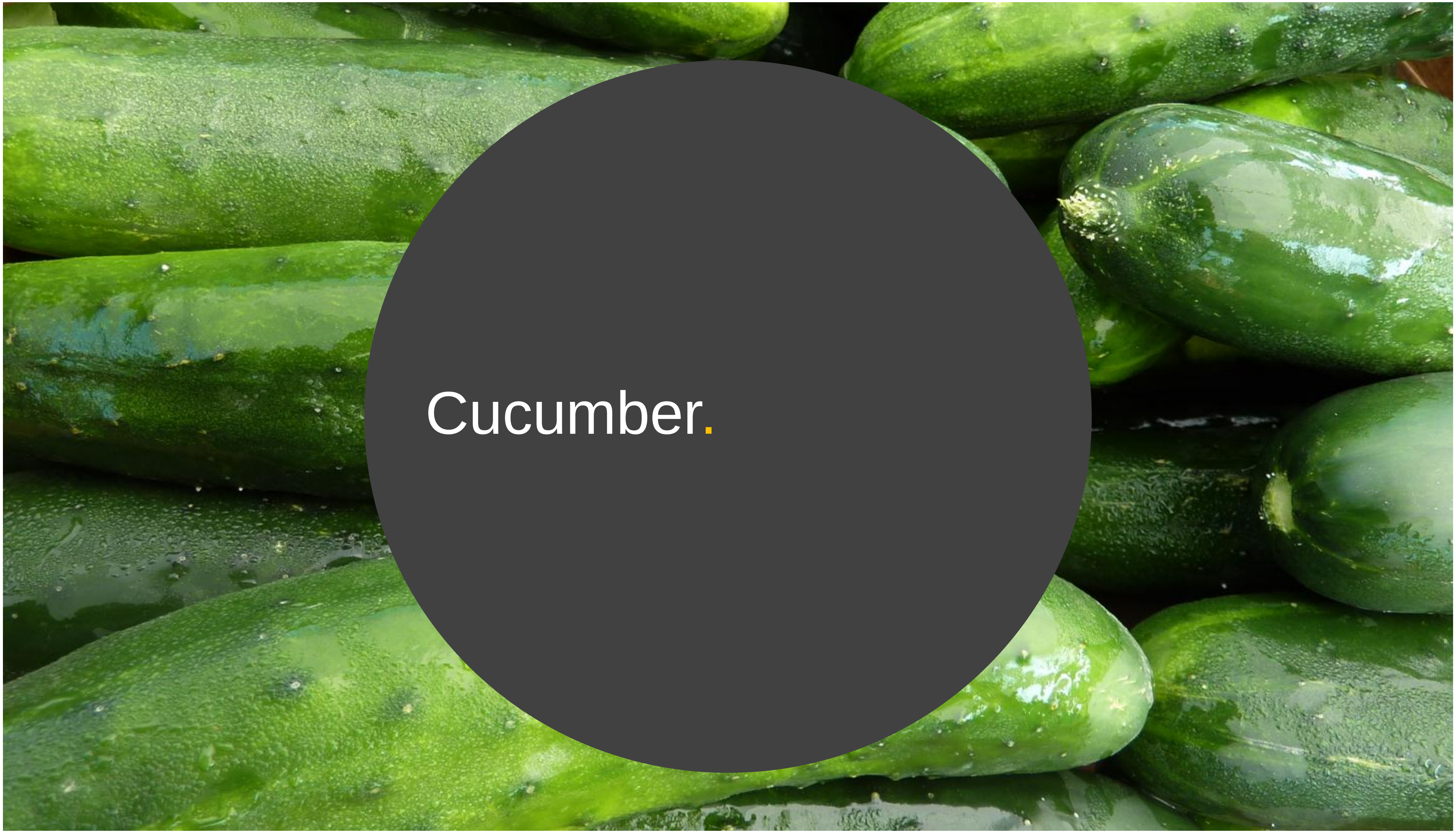
Gusto Mild Chunky Salsa

Marathon Spring Rolls

Horticulture Innovation Australia

colmar brunton.

Source: Mintel (2015)



Cucumber.

Purchase and consumption have stabilised after a peak in December 2014.

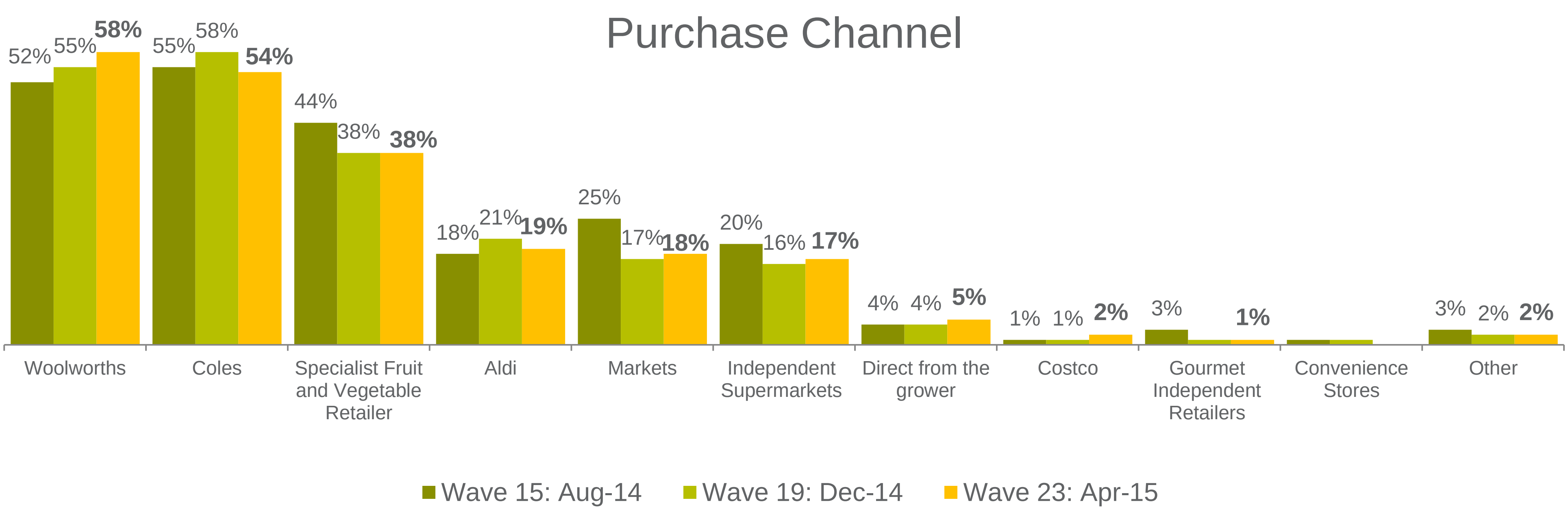
Purchase is continually increasing at Woolworths across the months.

Average Purchase **4.3** times per month

4.3 times, Wave 15
4.8 times, Wave 19

Average Consumption **12.7** times per month

12.2 times, Wave 15
13.1 times, Wave 19



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 15, N=337 and Wave 19, N=359 and Wave 23, N=308

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

Average Spend and Price Sensitivity

Average weight of purchase

The average consumer typically purchase **700g** of Cucumber in April 2015, which is in line with past months.

▲ 800g, Wave 15
▼ 600g, Wave 19

Recalled last spend

The average recalled last spend is **$2.90**, which is slightly higher than December 2014.

▲ $3.30, Wave 15
▼ $2.50, Wave 19

Value for money

On average, consumers perceive Cucumber to be good value for money **(6.3/10)**, which has increased positively across waves.

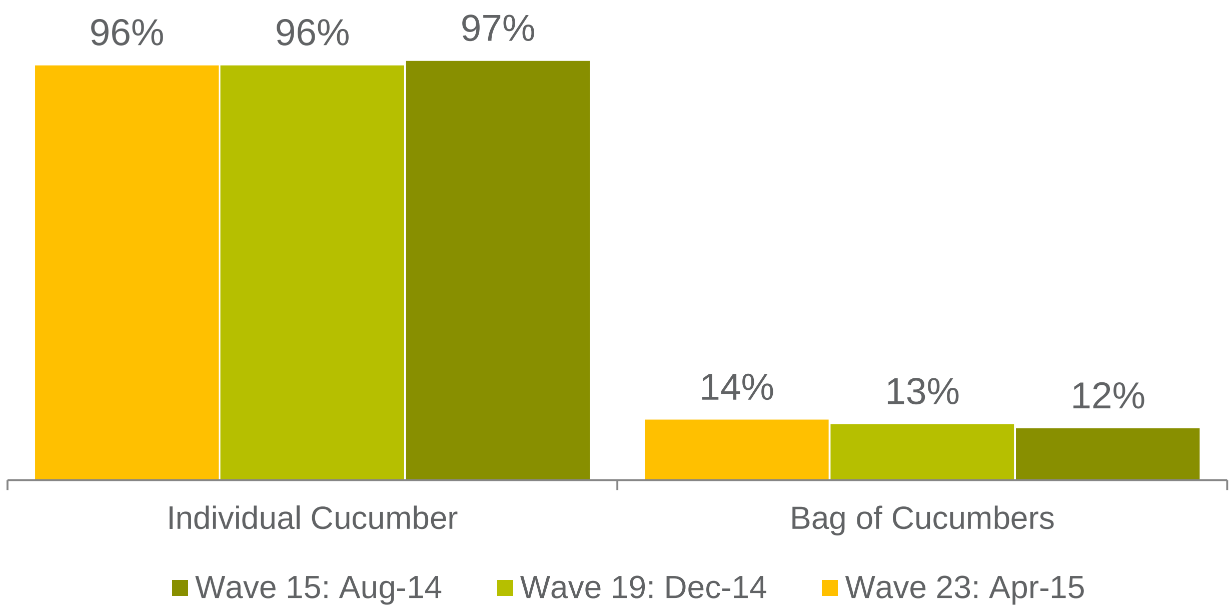
▼ 6.1/10, Wave 15
▼ 6.2/10, Wave 19

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 15, N=337 and Wave 19, N=359 and Wave 23, N=308

Horticulture Innovation Australia
colmar brunton.

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

Purchase formats have remained stable across waves, with nearly all consumers purchasing individual cucumbers.

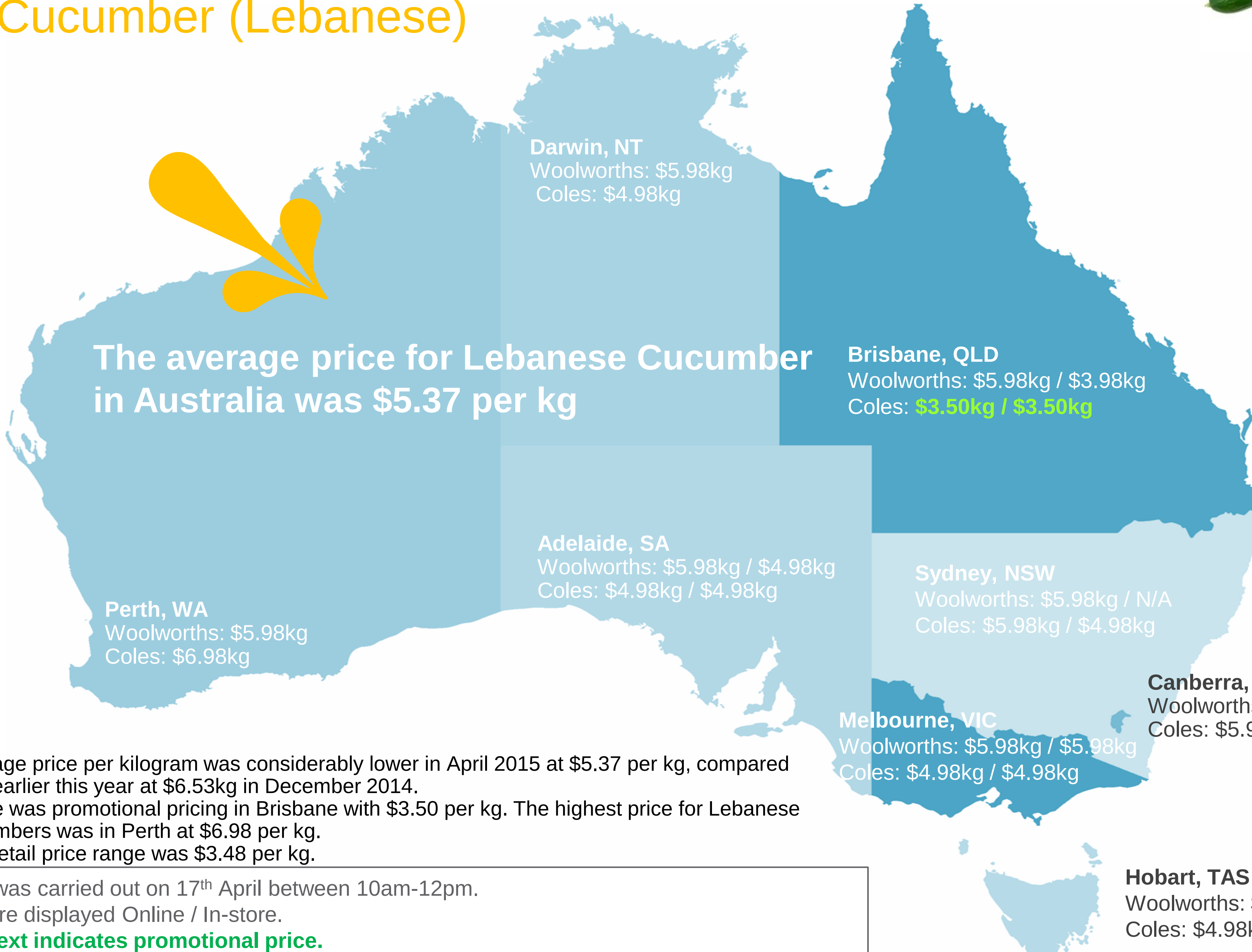


	Individual	Bag
Wave 15	2.5	2.2
Wave 19	2.6	2.2
Wave 23	2.3	2.4

Q3a. How much <commodity> does this typically equate to?
Sample Wave 15, N=337 and Wave 19, N=359 and Wave 23, N=308

Online and In-store Commodity Prices

Cucumber (Lebanese)



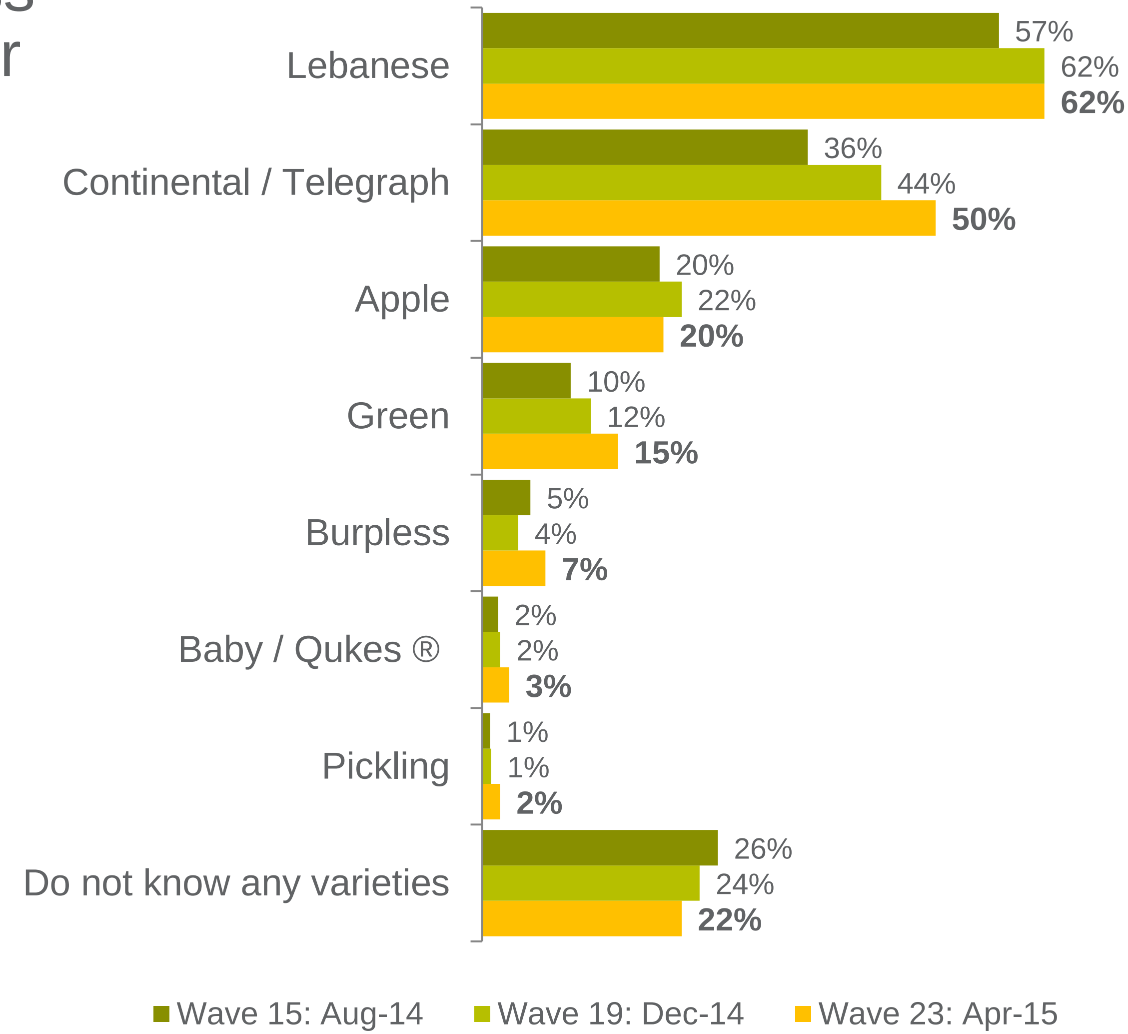
The average price for Lebanese Cucumber in Australia was $5.37 per kg

- Average price per kilogram was considerably lower in April 2015 at $5.37 per kg, compared with earlier this year at $6.53kg in December 2014.
- There was promotional pricing in Brisbane with $3.50 per kg. The highest price for Lebanese cucumbers was in Perth at $6.98 per kg.
- The retail price range was $3.48 per kg.

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

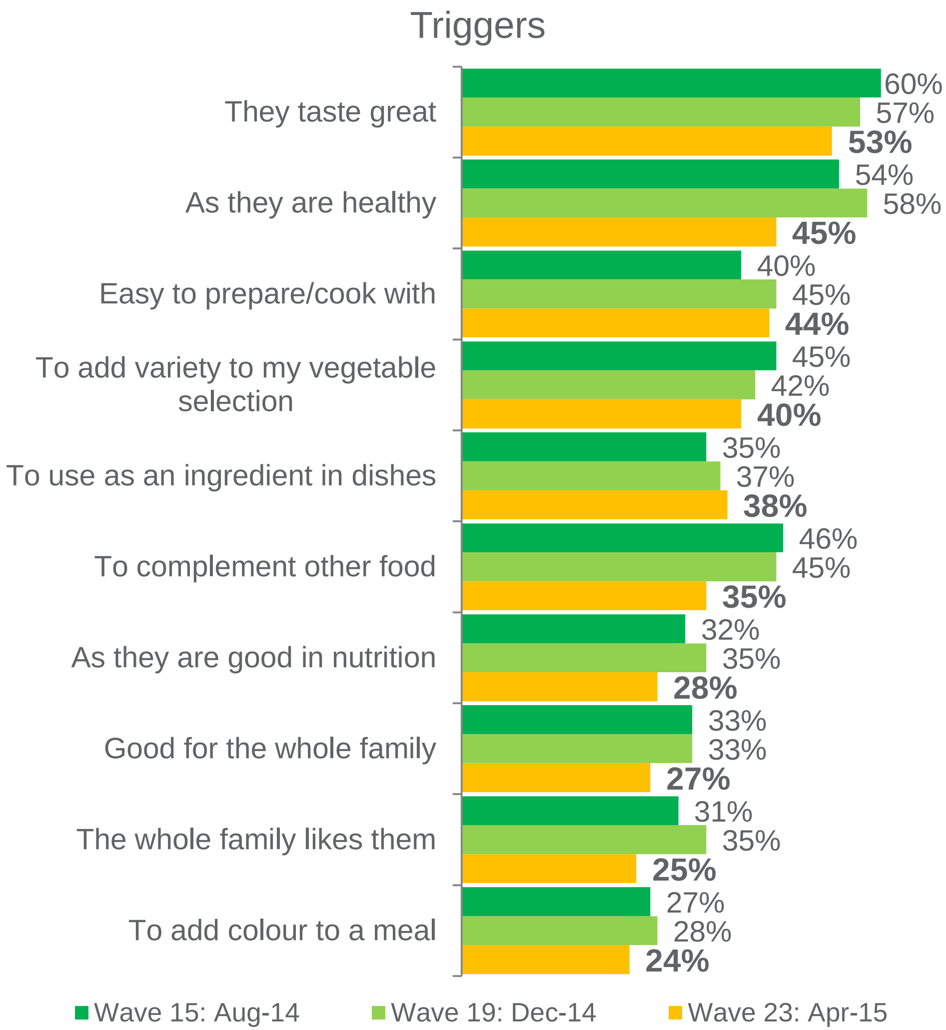
Spontaneous awareness of cucumbers are higher this wave.

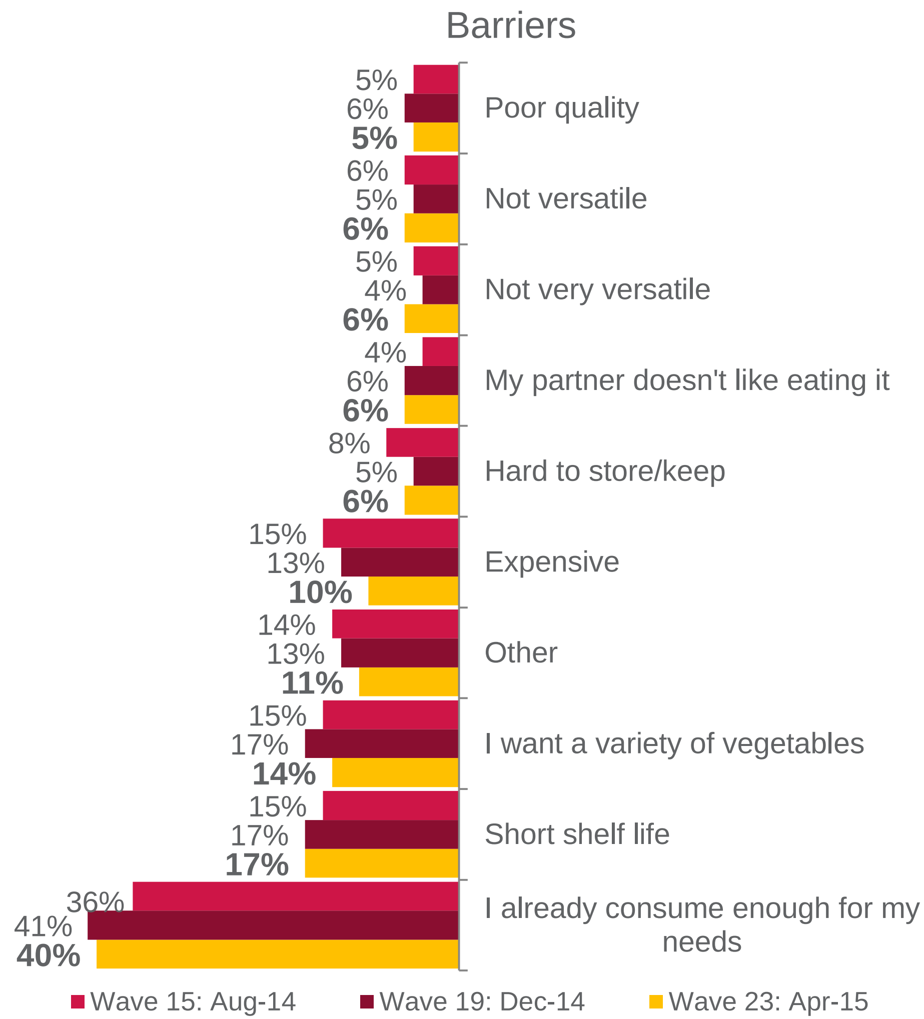
There is an increase in recall of Continental/Telegraph, Green and Burpless varieties.



Sample Wave 15, N=337 and Wave 19, N=359 and Wave 23, N=308
Q6a. What types/varieties of <commodity> are you aware of? (unprompted)

There is an overall decline in triggers to purchase this month, however taste and health are key influences on purchase. Already consuming enough is the main barrier. Positively, expense is a decreasing barrier to purchase across waves.





Sample Wave 15, N=337 and Wave 19, N=359 and Wave 23, N=308
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?

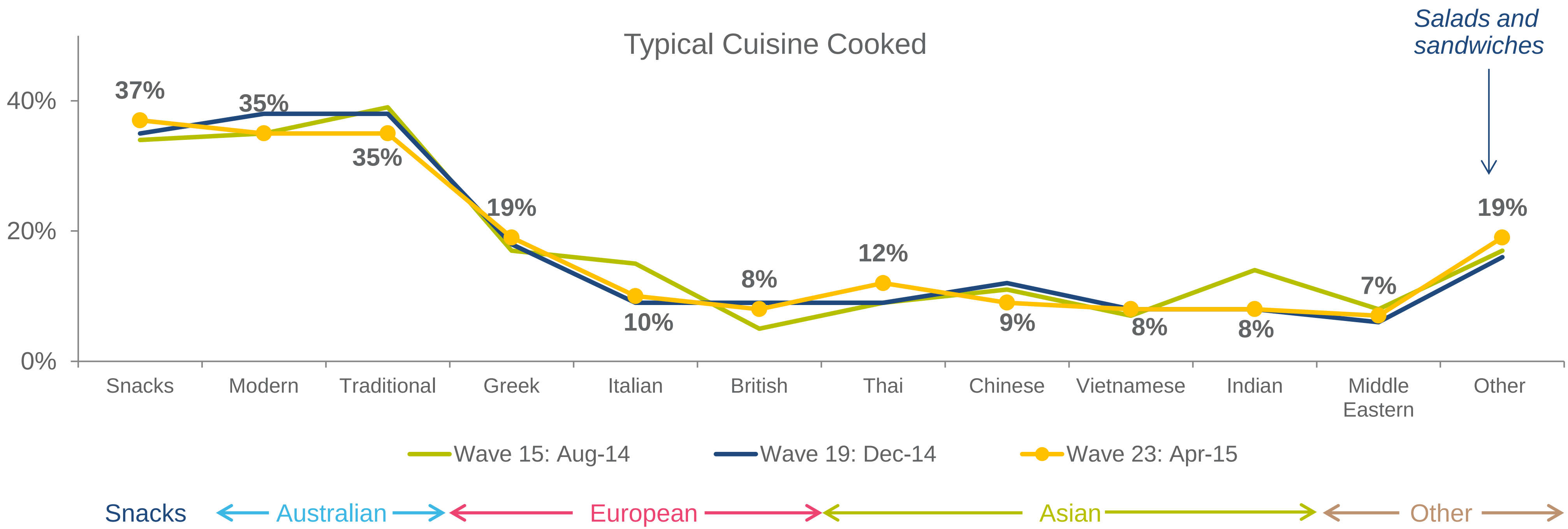
Horticulture Innovation Australia
colmar brunton.

Cucumber is eaten for a number of meal occasions, including dinner, quick meals and lunch.

It is primarily eaten as snacks, in salads, sandwiches and Australian cuisine.

Top 5 Consumption Occasions

	Wave 23	Wave 19	Wave 15
Weekday Dinner	**39%**	44%	32%
Every-day	**38%**	35%	39%
Quick Meals	**38%**	38%	37%
Weekday Lunch	**38%**	43%	40%
Weekend Lunch	**33%**	38%	36%



Sample Wave 15, N=337 and Wave 19, N=359 and Wave 23, N=308
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.

Cucumbers are generally served with tomato, lettuce and capsicum. This is consistent with salad and sandwich ingredients.

Cucumbers are consumed raw and not cooked, consistent with past months.

Accompanying Vegetables

Tomato	83%▲
Lettuce	67%▼
Capsicum	51%▲
Carrot	49%▲
Red onion	47%▲

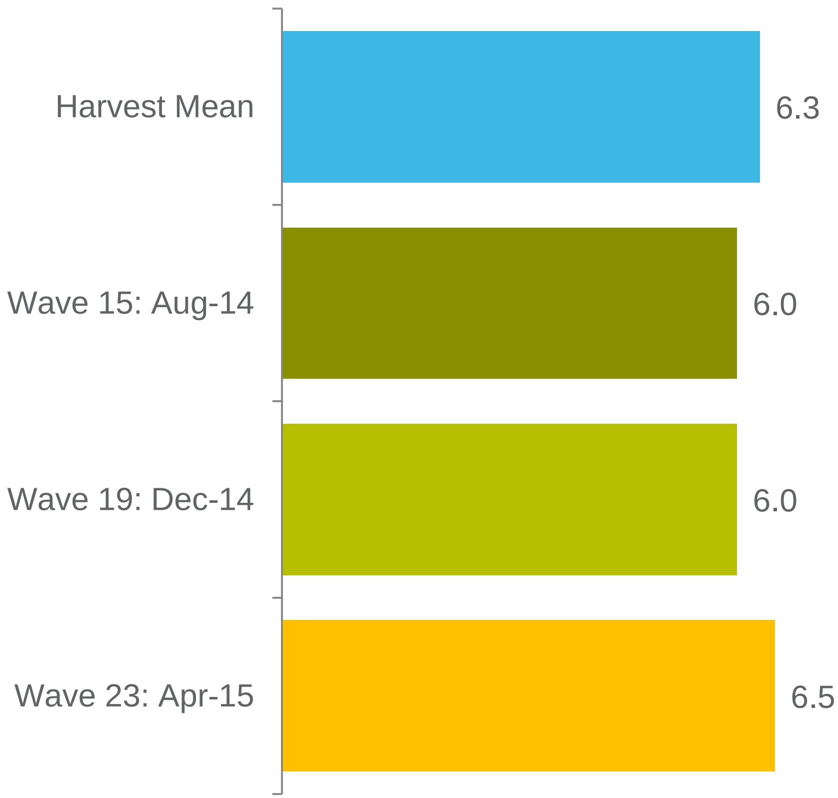
Top Cooking Styles

	Wave 15	Wave 19	Wave 23
Raw	82%	77%	77%
Other	12%	16%	16%
Stir frying	9%	12%	10%
Soup	4%	4%	5%
Blend	4%	4%	4%
Steaming	5%	4%	3%
Puree	1%	2%	3%
Baking	1%	1%	3%
Microwave	2%	2%	2%
Roasting	2%	3%	2%

Sample Wave 15, N=337 and Wave 19, N=359 and Wave 23, N=308
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?

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

The residual effects from media coverage relating to provenance and Australian grown produce is still positively impacting cucumbers. There is an opportunity to remain top of mind by highlighting Australian grown produce to consumers, where possible.

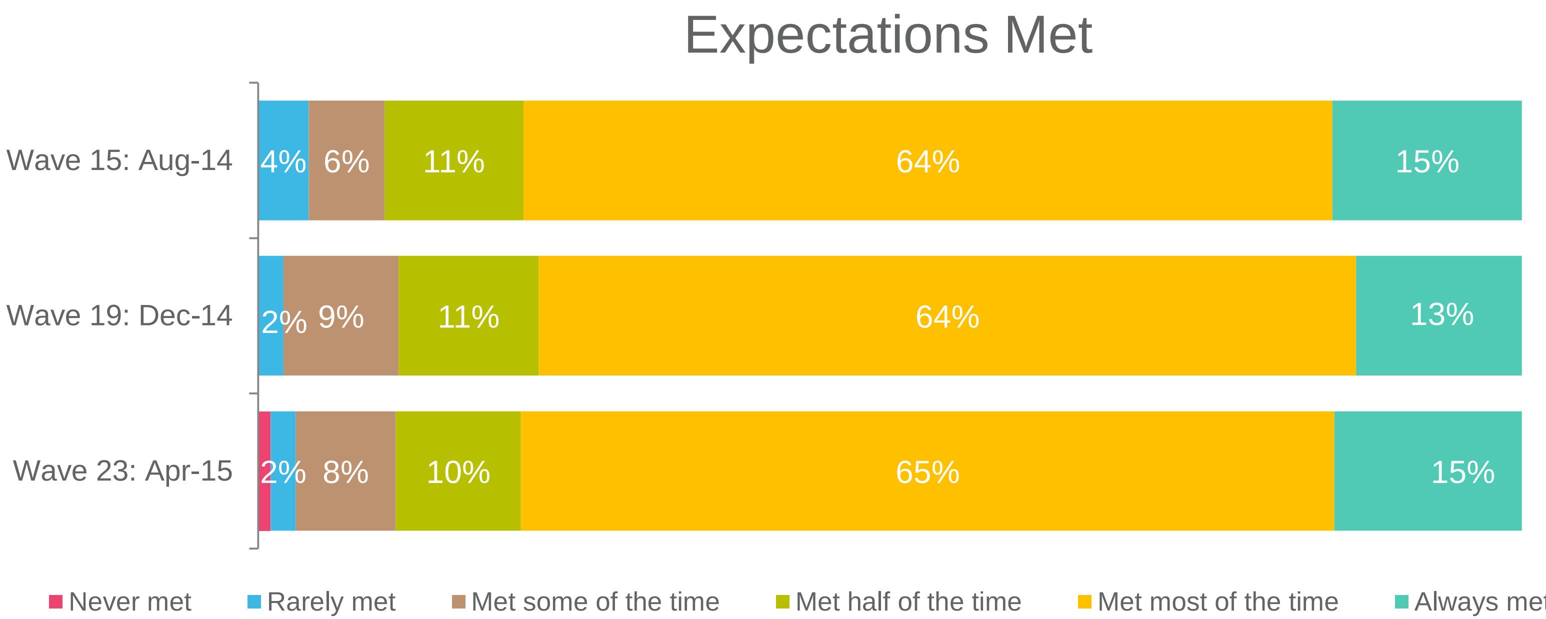


Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 15, N=337 and Wave 19, N=359 and Wave 23, N=308

Consumers expect cucumbers to remain fresh for just over a week. There has been a general decline over the past three waves in expectations of freshness.

Expected to stay fresh for **7.6** days

▲ 8.1 days, Wave 15
▲ 7.8 days, Wave 19



Sample Wave 15, N=337 and Wave 19, N=359 and Wave 23, N=308
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> ?

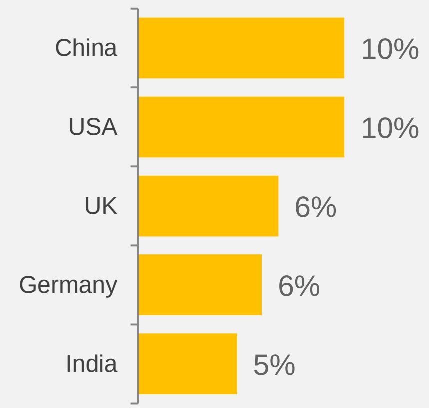
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Trends: Cucumber

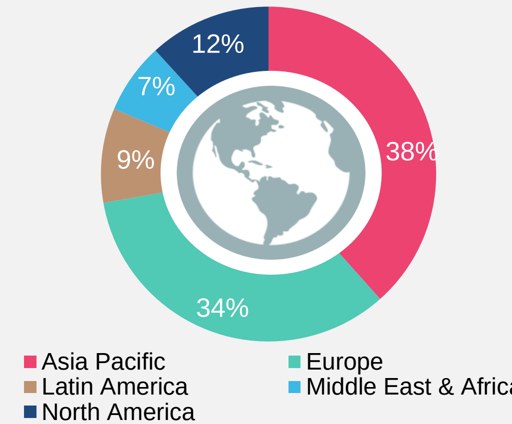
Cucumber Launches
February – April 2015

There were 263 products launched globally in the last three months that contained cucumber as an ingredient. The majority of launches occurred in Asia Pacific and Europe regions. The key categories for launches were skincare, sauces and sauces and meals.

Country

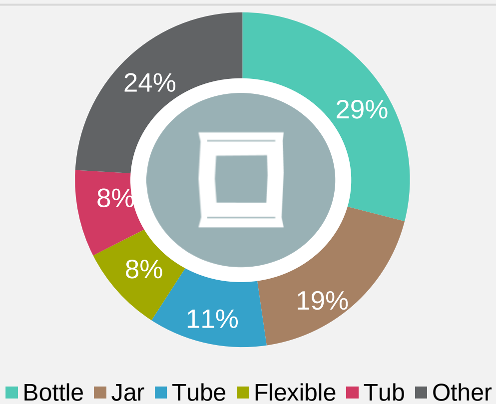


Region



263 Global Launches

Top Pack Formats



Categories

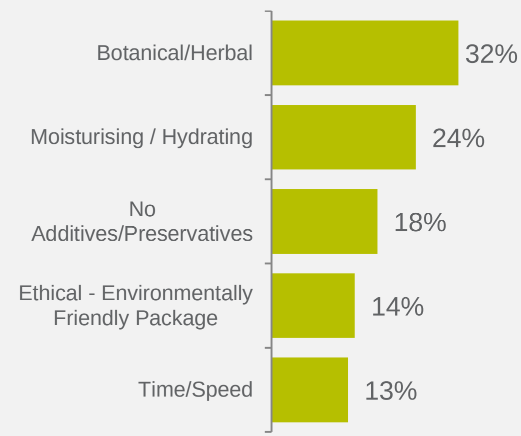
Skincare 32%

Sauces 17%

Meals 14%

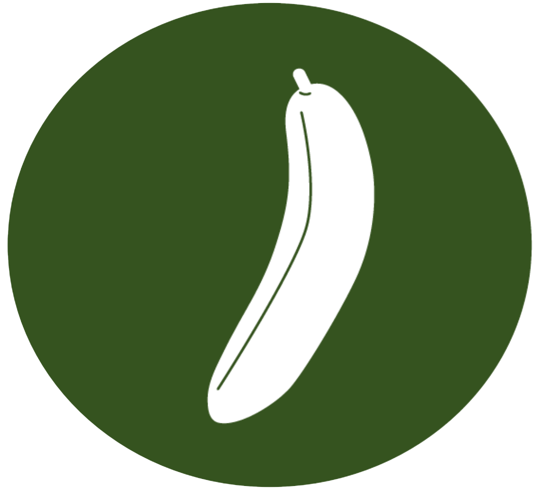
Juice drinks 11%

Top Claims



Cucumber Product Launches:
Last 3 Months (February – April 2015)
Summary

- There were 263 cucumber products launched globally. This was higher than the last round of trends.
- Six products containing cucumber were launched in Australia over the last three months. These were primarily beauty and skincare products.
- Key regions for launch were Asia Pacific (38%) and Europe (34%) .
- Bottles (29%), Jars (19%) and Tubs (11%) were the most common packaging formats used, consistent between waves.
- Top category launches were skincare (32%), sauces & seasonings (17%) and meals (14%).
- The top claims used for products were botanical/herbal (32%), moisturising/hydrating (24%) and no additives (18%).
- The most innovative launches were fruit drinks and cosmetic products (examples of these can be found in the following pages).

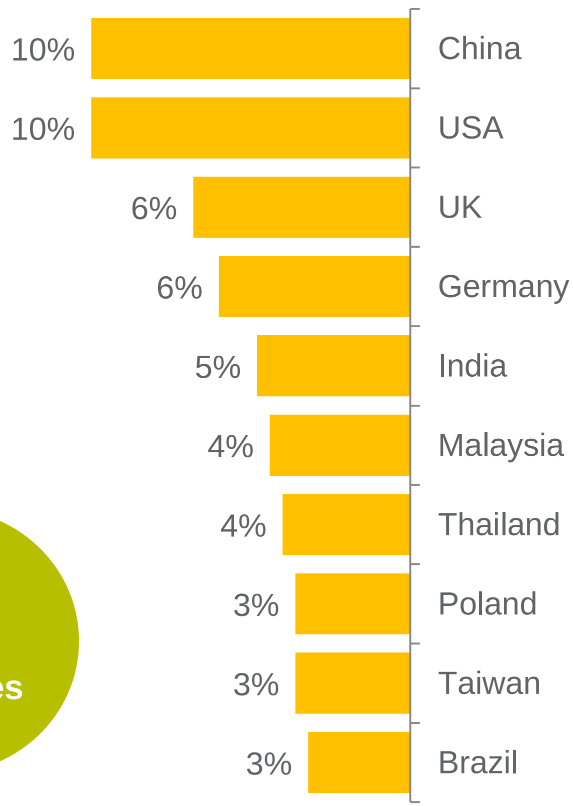


Source: Mintel (2015)

Cucumber Launches

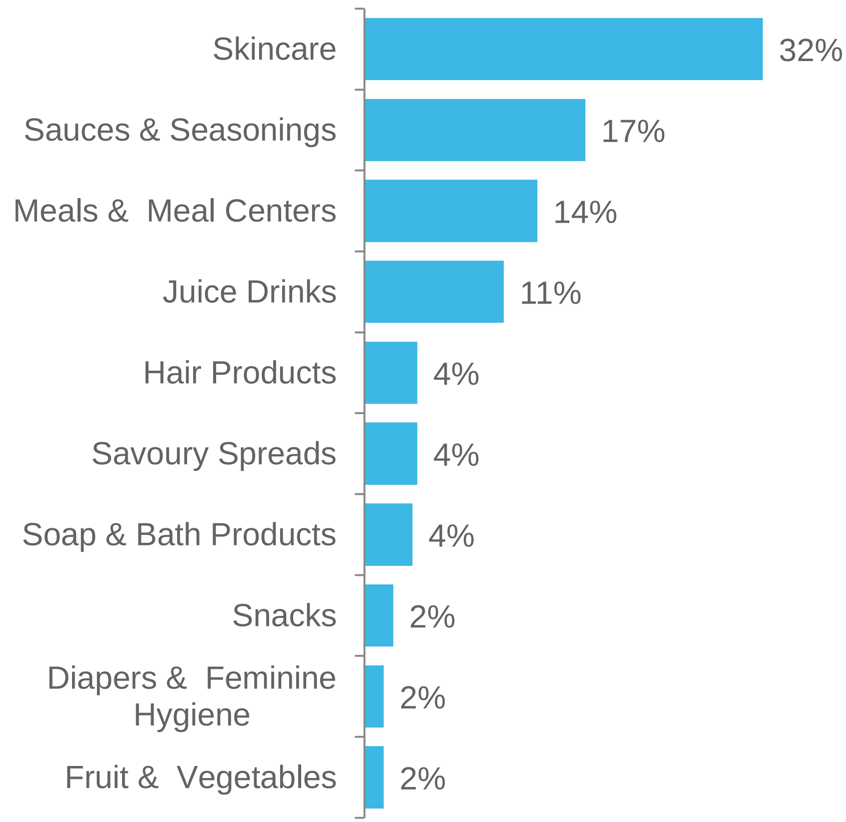
- China and the USA were the main countries of launch for cucumber products.
- Products were primarily skincare, sauces and meals.

Top Launch Countries



263 Global Launches

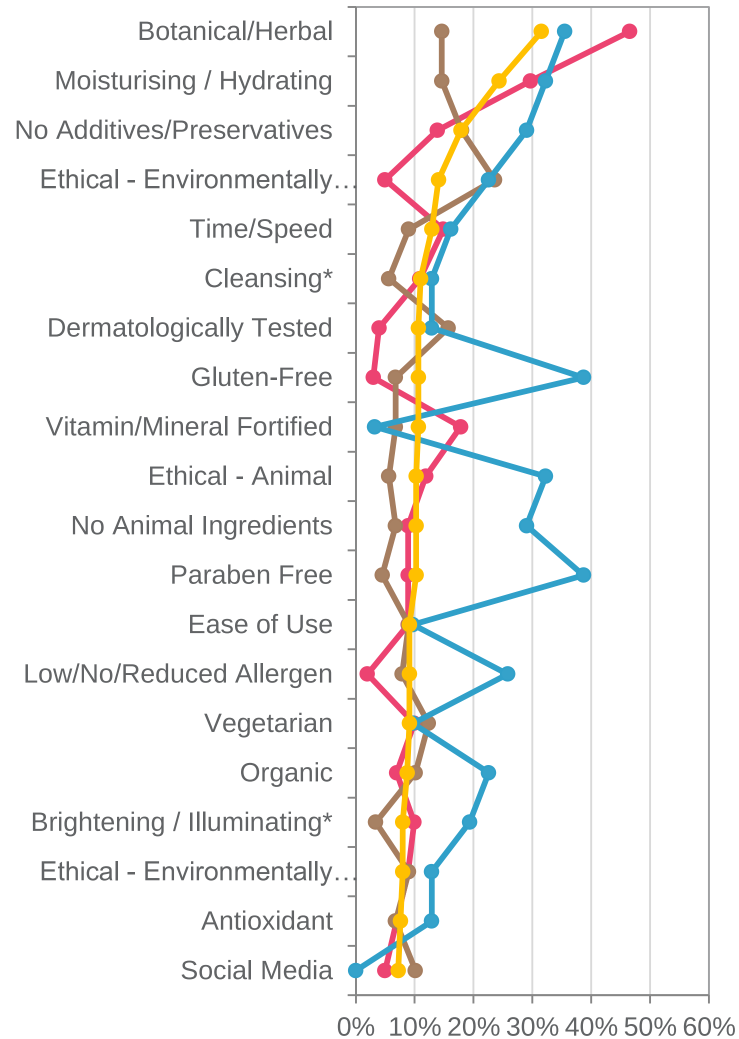
Top Launch Categories



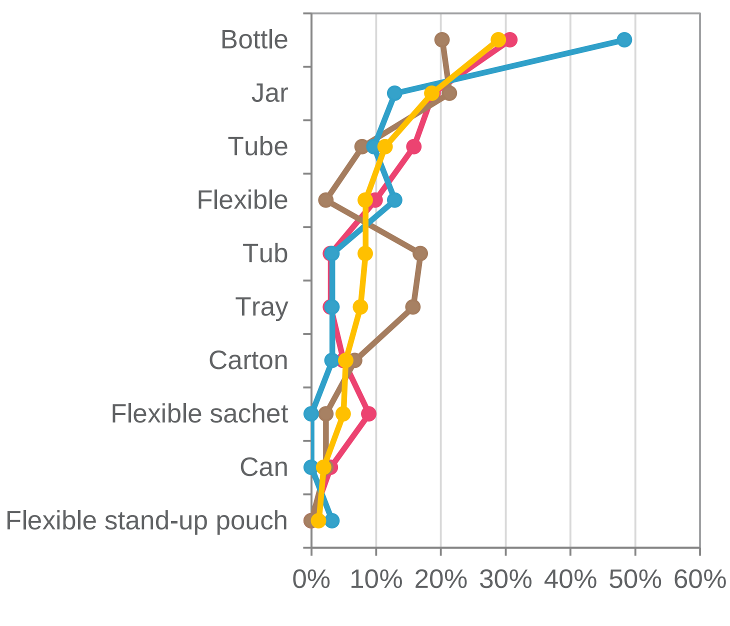
Cucumber Launches

- The main claims used on products was botanical/herbal and moisturising/hydrating.
- Bottles, jars and tubes were typical packaging formats used. Nearly half of all products launched in North America were launched in bottles.

Top Claims Launched



Top Pack Formats Launched



Only regions with n >30 are displayed

Innovative Cucumber Launches:
L3M (February – April 2015)

Cawston Press Sweet Greens Apple, Pear, Cucumber & Lettuce Nectar (UK)

Cawston Press Sweet Greens Apple, Pear, Cucumber & Lettuce Nectar is now available. This original fruit and veg blend is said to be bright and beautiful and is made with succulent blushing pears, super-cool cucumber and crisp lettuce, with a twist of mint, signature apple juice and a splash of water.

Claims:
No Additives/Preservatives, Social Media, Ethical - Environmentally Friendly Package, Low/No/Reduced Sugar

Yes To Cucumbers Soothing Hypoallergenic Facial Wipes (USA)

Yes To Cucumbers Soothing Facial Wipes have been relaunched with a new name (previously Hypoallergenic Facial Towelettes) and limited edition packaging offering 33% more, comprising 40 pre-moistened wipes and inspired with love by Ingrid Nilsen. The formula has been enriched with cucumbers and aloe vera.

Claims:
Sensitive Skin, Paraben Free, Cleansing*, Botanical/Herbal, Hypoallergenic, Ethical - Environmentally Friendly Product, Ethical - Animal, Ethical - Charity, Dermatologically Tested, Non-Comedogenic, Time/Speed

Arahova Organic Tzatziki Dip (Canada)

Arahova Organic Tzatziki Dip is made with olive oil and can be used as a spread, dip, salad dressing, or a sauce for souvlaki and all meats and poultry. This low fat product is suitable for vegetarians, free from preservative, trans fat and gluten, and has been OCQV organic certified. It retails in a 210g pack.

Claims:
No Additives/Preservatives, Low/No/Reduced Allergen, Organic, Low/No/Reduced Fat, Gluten-Free, Low/No/Reduced Transfat, Vegetarian

AH Biologisch Cucumber Salad (Netherlands)

AH Biologisch Komkommer Salade (Cucumber Salad) is milk free and made with natural flavourings and fragrances. The organic product retails in a 150g pack which features the Bewuste Keuze (Conscious Choice), EU Green Leaf and EKO logos.

Claims:
Organic, Low/No/Reduced Allergen

Source: Mintel (2015)

Innovative Cucumber Launches:
L3M (February – April 2015)

Wan Mei Chu Niang Ling Zui Cucumber (China)

Wan Mei Chu Niang Ling Zui Huang Gua (Ling Zui Cucumber) can be served with rice, and is suitable for on-the-go. This product retails in an 80g pack.

Claims:
On-the-Go

Pura Fruta Superfruit Handcrafted Cucumber Juice (USA)

Pura Fruta Superfruit Handcrafted Cucumber Juice is now available. The artisan and vegan product comprises100% cold-pressed fruit juice free from added sugar. The product is kosher and Fair Trade certified, and each purchase is said to give farmers better prices, and help women support their families. It retails in a 335ml pack.

Claims:
Vegan, Kosher, Ethical - Environmentally Friendly Product, Low/No/Reduced Sugar, Ethical - Human, No Animal Ingredients

Bielenda Ogorek & Limonka Bouquet Nature Face Mask Kit (Poland)

Bielenda Ogorek & Limonka Bouquet Nature Maseczka Gleboko Oczyszczajaca + Maseczka Intensywnie Nawilzajaca (Face Mask Kit) comprises: Cucumber & Lime Deep Cleansing Face Mask (5g); and Intensively Moisturising Face Mask (5g).

Claims:
Vitamin/Mineral Fortified, Anti-Acne, Anti-Bacterial, Botanical/Herbal, Skin Disorders, Cleansing*, Whitening, Dermatologically Tested, Firming*

Clear Balance Refreshing Cucumber Facial Cleanser (UAE)

Clear Balance Refreshing Cucumber Facial Cleanser contains cooling cucumber, said to gently cleanse and rehydrate skin, leaving a fresh and youthful feeling. The product is claimed to protect against dirt and bacteria and retails in a 250ml pack.

Claims:
Botanical/Herbal, Moisturising / Hydrating, Cleansing*, Anti-Bacterial

Source: Mintel (2015)

Innovative Cucumber Launches:
L3M (February – April 2015)

M&S Sparkling British Apple & Cucumber Presse (UK)

M&S Sparkling British Apple & Cucumber Presse is now available. This carbonated drink is described as a deliciously refreshing pressé made with a blend of British apple juice, pressed in Herefordshire, infused with British cucumber and spring water. It is suitable for vegetarians, and retails in a 750ml bottle.

Claims:
Vegetarian

Rolnik Premium Pickled Cucumber in Slices for Sandwich (Brazil)

Rolnik Premium Pepino Fatiado em Conserva para Sanduíche (Pickled Cucumber in Slices for Sandwich) is now available. The gluten-free product retails in a 650g jar.

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

Marks & Spencer British Elderflower & Cucumber Cordial (UK)

Marks & Spencer British Elderflower & Cucumber Cordial is a light floral cordial made with an infusion of fragrant, hand picked elderflowers from Gloucestershire's Seven Springs plantation and refreshing British cucumber. The product is suitable for vegetarians and retails in a recyclable 500ml pack.

Claims:
Vegetarian, Ethical - Environmentally Friendly Package

Woolworths Food 2 Go Ham, Cheese & Cucumber Snack Pack (South Africa)

Woolworths Food 2 Go Ham, Cheese & Cucumber Snack Pack is now available. The product consists of sliced ham with white cheddar and cucumber wedges, and retails in an 80g pack.

Claims:
On-the-Go

Source: Mintel (2015)

Australian Cucumber Launches:
L3M (February – April 2015)

Natio Restore Mature Skin Eye Serum

Le Tan Flawless Legs Wash Off Instant Tan

Sirena Tuna Bruschetta with Dill & Pickle

Three Foodies Greek Tzatziki Dip

Source: Mintel (2015)

Eggplant.

Consumers purchase eggplant on average three times per month. Consumption has declined over past waves, eaten on average four times per month.

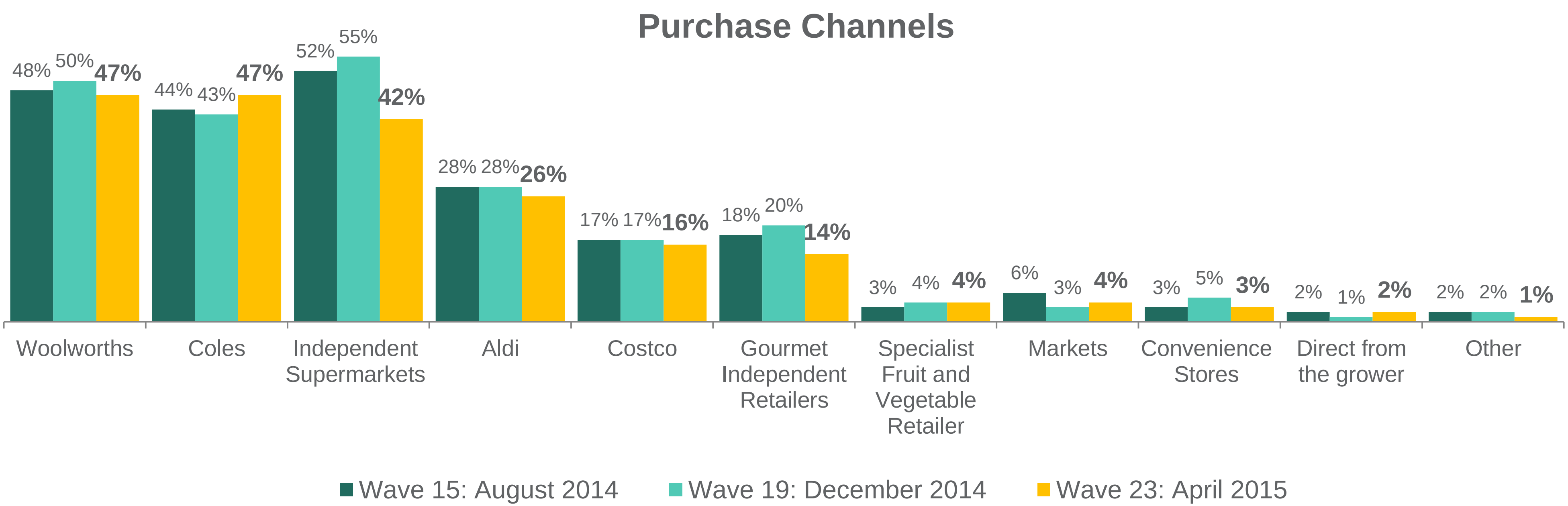
Eggplant is primarily purchased through mainstream retailers. There has been a sharp decline in purchase through independent supermarkets from the previous wave.

Average Purchase **3.1** times per month

- 3.1 times, Wave 15
- ▲ 3.5 times, Wave 19

Average Consumption **4.2** times per month

- ▲ 4.4 times, Wave 15
- ▲ 4.9 times, Wave 19



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 15, N=306, Wave 19 N=304 and Wave 23 N=303

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

Average Spend and Price Sensitivity

Average weight of purchase

On average, consumers purchase **900g** of eggplant, in line with past waves.

- 900g, Wave 15
- 900g, Wave 19

Recalled last spend

Recalled last spend on eggplant purchase is **$4.48**, increasing from Wave 19.

- ▼ $4.39, Wave 15
- ▼ $4.17, Wave 19

Value for money

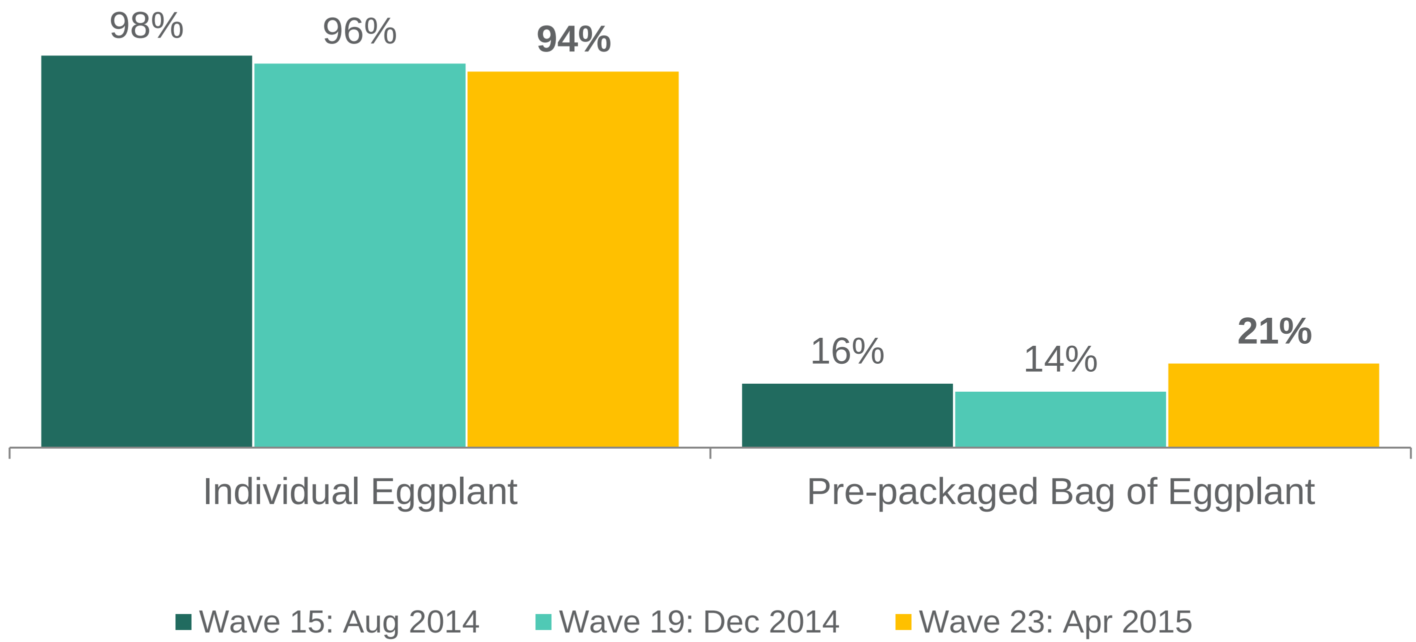
Overall consumers' perceived value for money is only fair **(6.1/10)**, which represents no change since the previous wave.

- ▼ 6.0/10, Wave 15
- 6.1/10, Wave 19

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 15, N=306, Wave 19 N=304 and Wave 23 N=303

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

The majority of consumers purchase loose eggplants. However, a small number of consumers purchase both loose and pre-packaged formats.

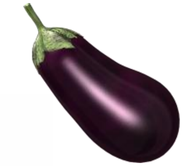


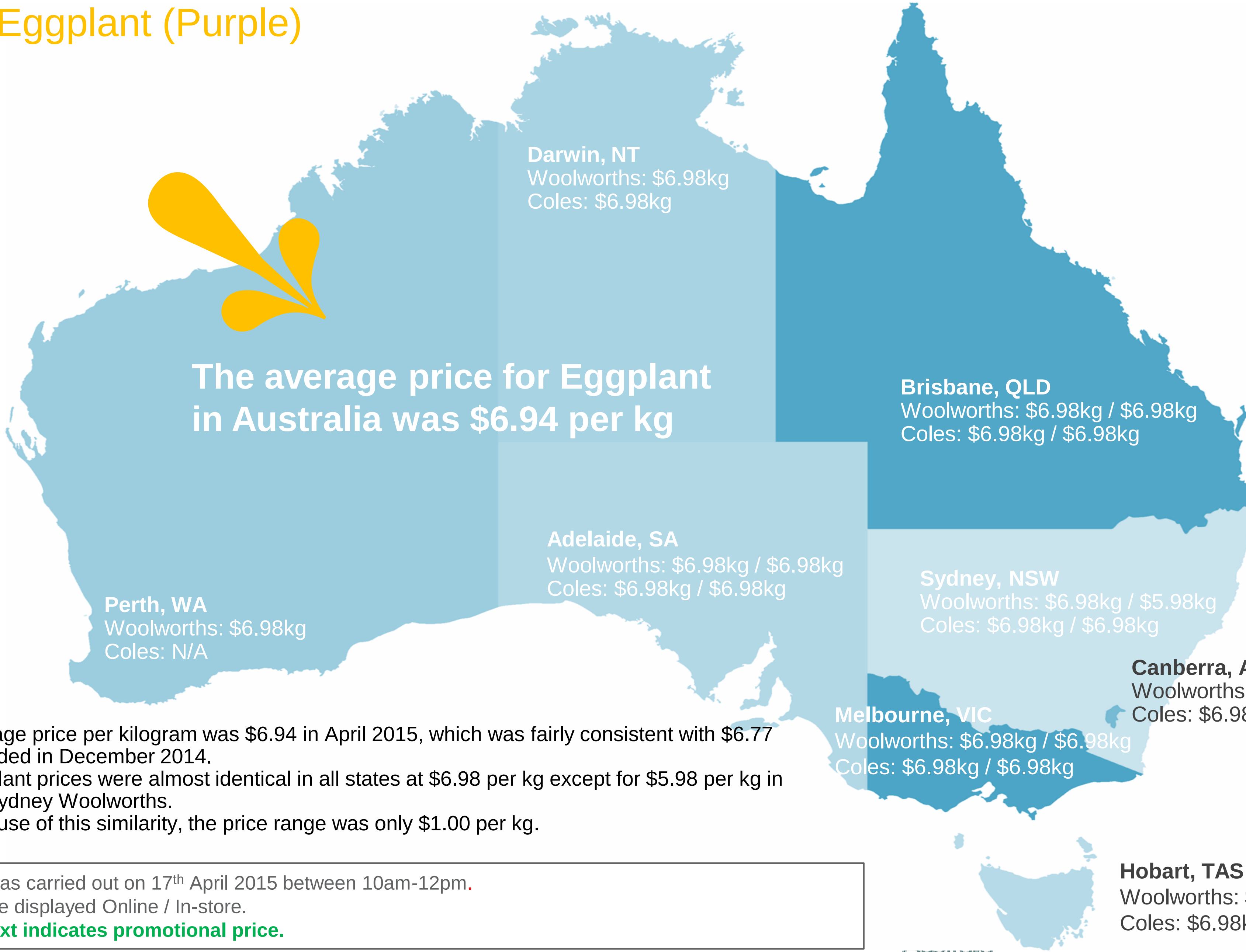
Average Amount Purchased	Individual	Pre-packaged Bag
Wave 15: August 2014	2.0	2.0
Wave 19: December 2014	2.2	1.7
Wave 23: April 2015	2.2	2.2

Q3a. How much <commodity> does this typically equate to?
Sample Wave 15, N=306, Wave 19 N=304 and Wave 23 N=303

Online and In-store Commodity Prices

Eggplant (Purple)



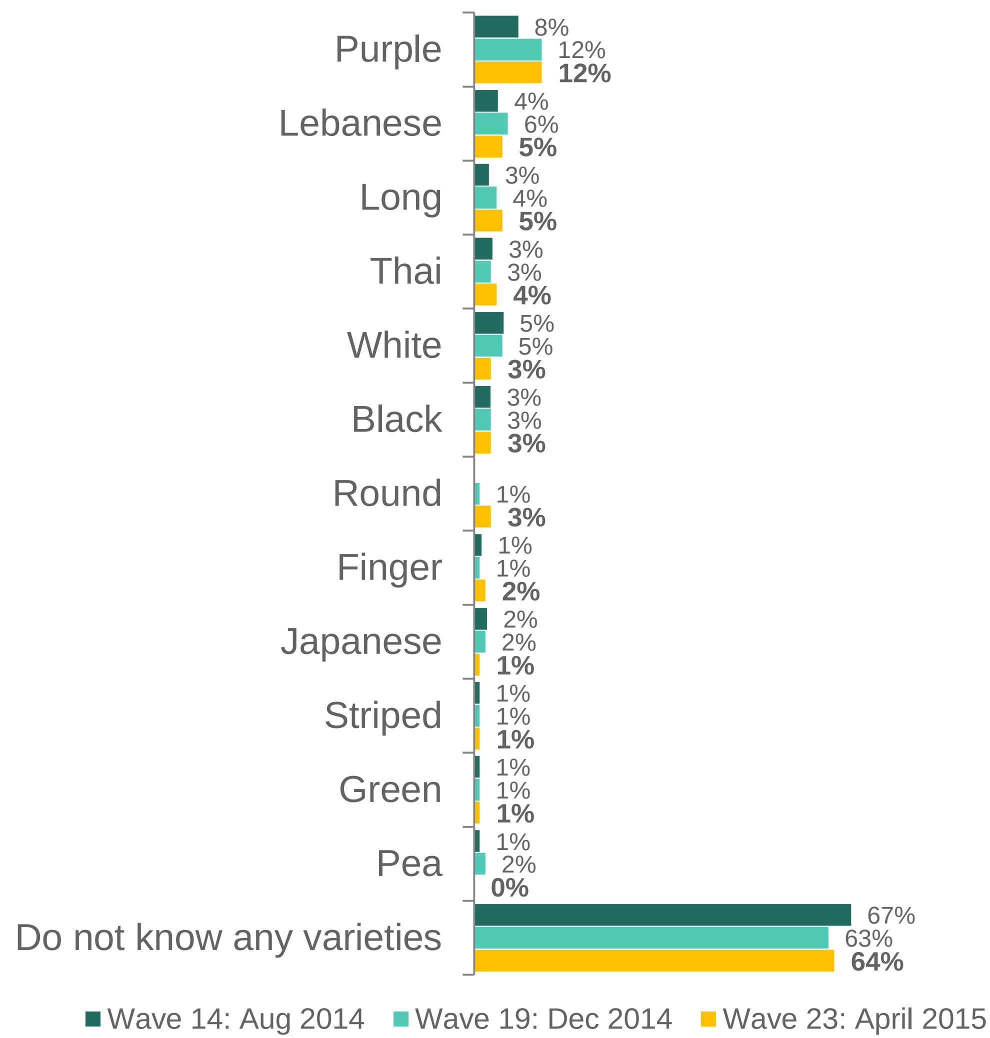


- Average price per kilogram was $6.94 in April 2015, which was fairly consistent with $6.77 recorded in December 2014.
- Eggplant prices were almost identical in all states at $6.98 per kg except for $5.98 per kg in the Sydney Woolworths.
- Because of this similarity, the price range was only $1.00 per kg.

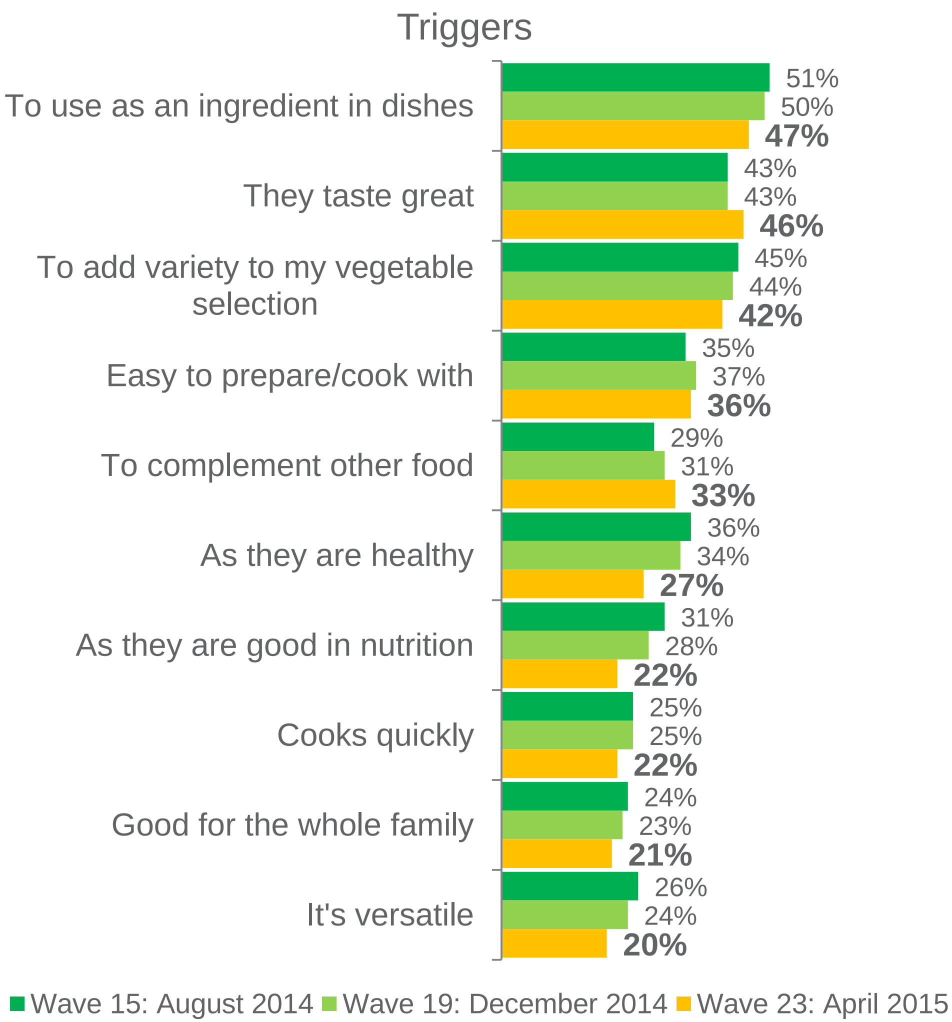
Pricing was carried out on 17th April 2015 between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates promotional price.

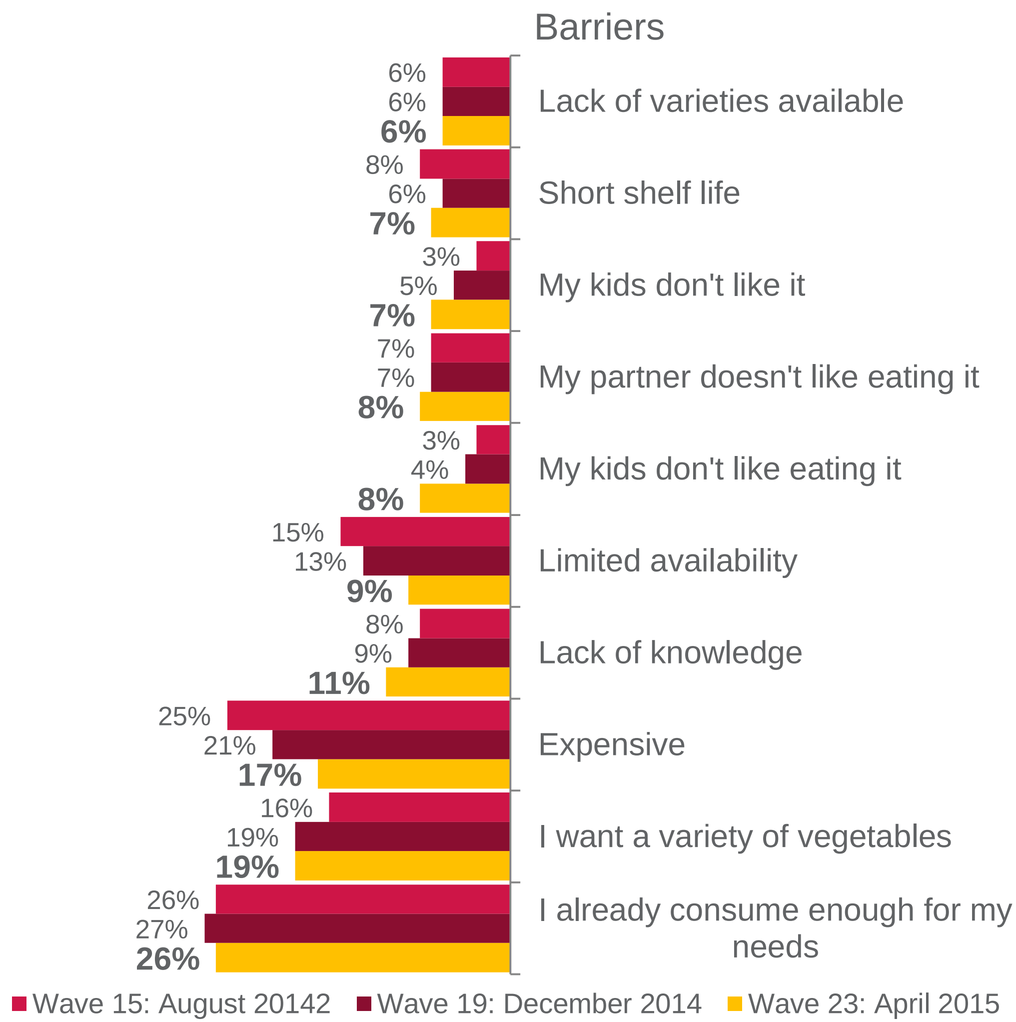
Spontaneous awareness of eggplant varieties remains low, with just under two thirds of consumers unable to recall a type.

Consumers are prompted by colour and location for eggplant varieties.



The key trigger to eggplant purchase is the use as an ingredient in dishes, with an upwards trend for its great taste.
Already consuming enough is the main barrier. Positively, expense and limited availability is a decreasing barrier to purchase.





Sample Wave 15, N=306, Wave 19 N=304 and Wave 23 N=303
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?

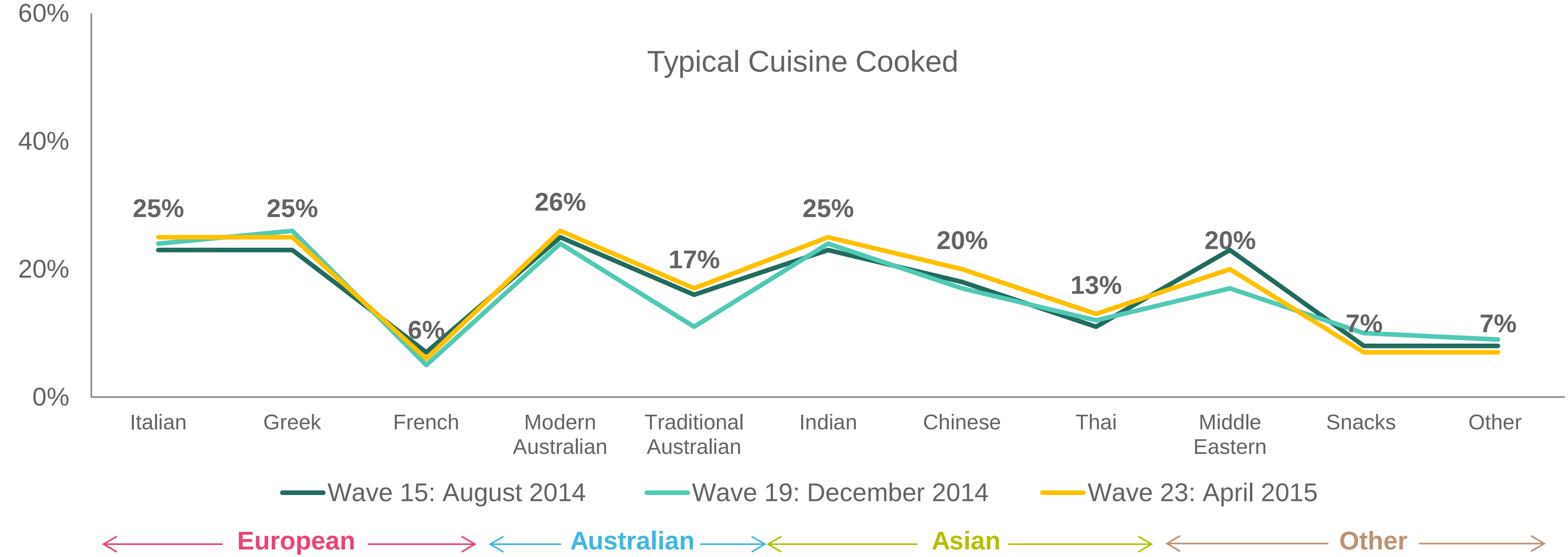
Horticulture Innovation Australia
colmar brunton.

Eggplant is typically used in Italian, Indian and Modern Australian cuisine, however a spike in Traditional Australian cuisine has been observed this wave back to August 2014 levels.

Weekday and weekend dinners are the main consumption occasions, with one fifth eating eggplant everyday.

Top 5 Consumption Occasions

	Wave 23	Wave 19	Wave 15
Weekday Dinner	**49%**	49%	49%
Weekend Dinner	**35%**	36%	32%
Family meals	**35%**	30%	35%
Every-day	**20%**	21%	20%
New recipes	**20%**	21%	19%



Sample Wave 15, N=306, Wave 19 N=304 and Wave 23 N=303
Q10. What cuisines do you cook/consume that use <commodity> ?
Q11. Which of the following occasions do you typically consume/use <commodity> ?

Horticulture Innovation Australia
colmar brunton.

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

Eggplant is generally served with tomatoes, onion and capsicums, with the latter declining since the previous wave.

Consumers prefer to grill, roast, stir fry and bake eggplant, consistent with the previous wave.

Accompanying Vegetables

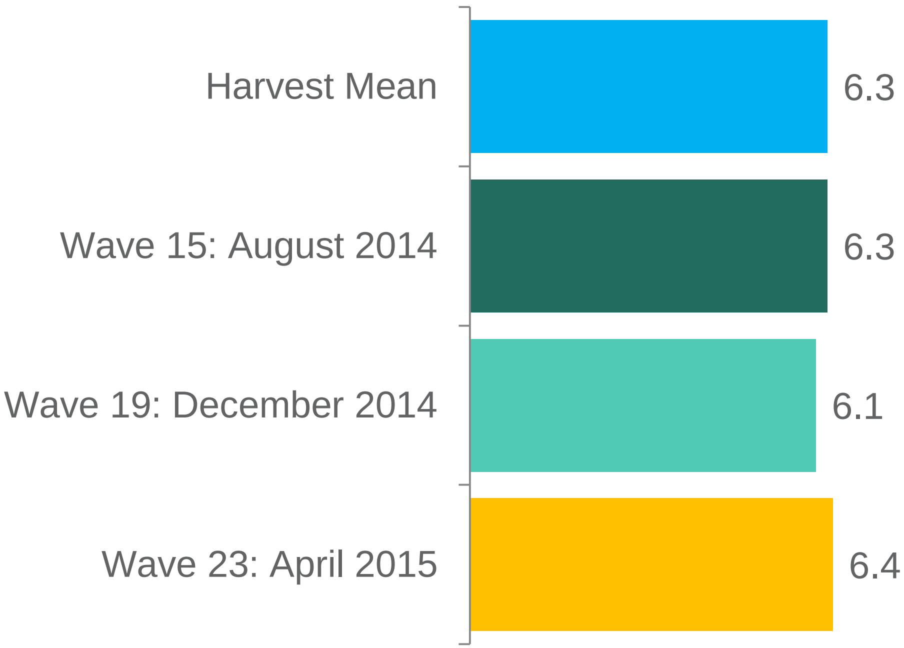
Tomato	47%
White Onion	35%
Capsicum	31%
Garlic	27%
Potato	26%

Top Cooking Styles

	Wave 15	Wave 19	Wave 23
Grilling	38%	43%	37%
Baking	32%	29%	37%
Roasting	33%	36%	34%
Shallow Frying	29%	25%	28%
Stir frying	32%	33%	27%
Sautéing	20%	26%	20%
Stewing (slowcooking)	23%	21%	19%
Deep Frying	11%	16%	13%
Boiling	6%	7%	9%
Other	6%	8%	8%

Sample Wave 15, N=306, Wave 19 N=304 and Wave 23 N=303
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?

The importance of provenance has increased in Wave 23, sitting slightly above the Harvest mean.



AUSTRALIAN GROWN

Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 15, N=306, Wave 19 N=304 and Wave 23 N=303

Horticulture Innovation Australia

colmar brunton.

Consumers expect eggplant to remain fresh for just over one week once purchased, a slight decline since the previous wave.

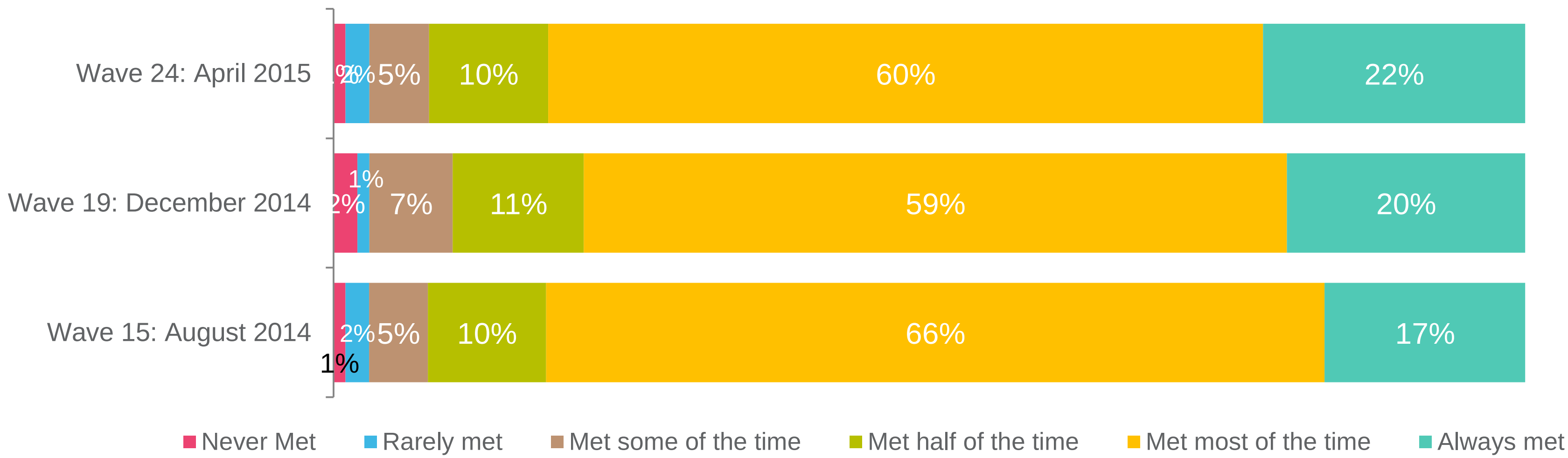
The expectations of freshness is met for the majority of consumers.

Expected to stay fresh for **7.9** days

▼ 7.8 days, Wave 15

▲ 8.6 days, Wave 19

Expectations Met



Sample Wave 15, N=306, Wave 19 N=304 and Wave 23 N=303
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.

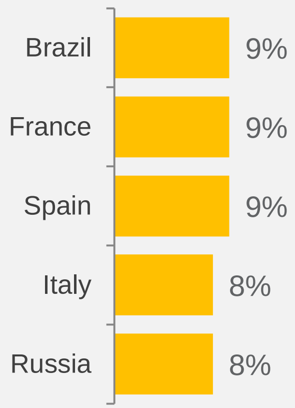
Trends: Eggplant

Eggplant Global Launches

February – April 2015

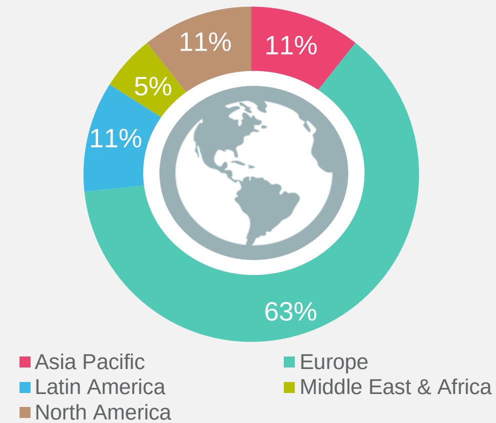
There were 75 products that contained Eggplant as an ingredient launched globally over the last three months. The majority of those launches occurred in Europe, particularly in France and Spain. Products ranged from meals, sauces and fruit & vegetables.

Country

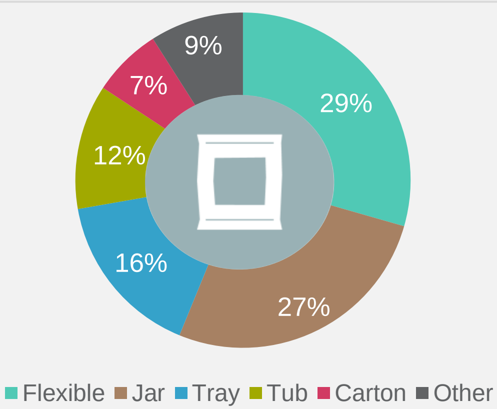


75 Global Launches

Region



Top Pack Formats



Categories

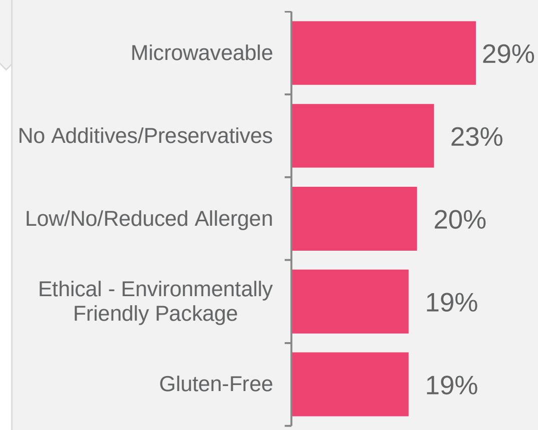
Meals 35%

Sauces & Seasonings 24%

Fruit & Vegetables 16%

Savoury Spreads 11%

Top Claims



Eggplant Product Launches:
L3M (February – April 2015)

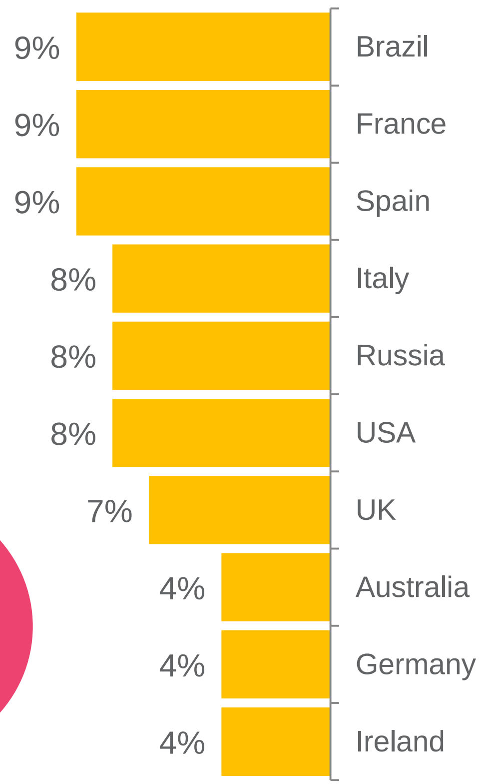
- There were 75 Eggplant products launched globally in the last three months.
- There were three products launched in Australia, two pasta sauces and a dip product.
- The majority of eggplant launches occurred in Europe (63%). There were a number of launches in Asia Pacific, North America and Latin America (all 11%).
- Categories for launches were meals (35%), sauces and seasonings (24%) and fruit and vegetables (16%).
- Key claims used on products were around convenience, being microwavable (29%), and health (no additives 23%, reduced allergens 20% and gluten free 19%). These trends were consistent with past months.
- A variety of packaging formats were used including flexible (29%), jars (27&) and trays (16%).
- The most innovative launches were meal products (examples of these can be found in the following pages).

Source: Mintel (2015)

Eggplant Launches

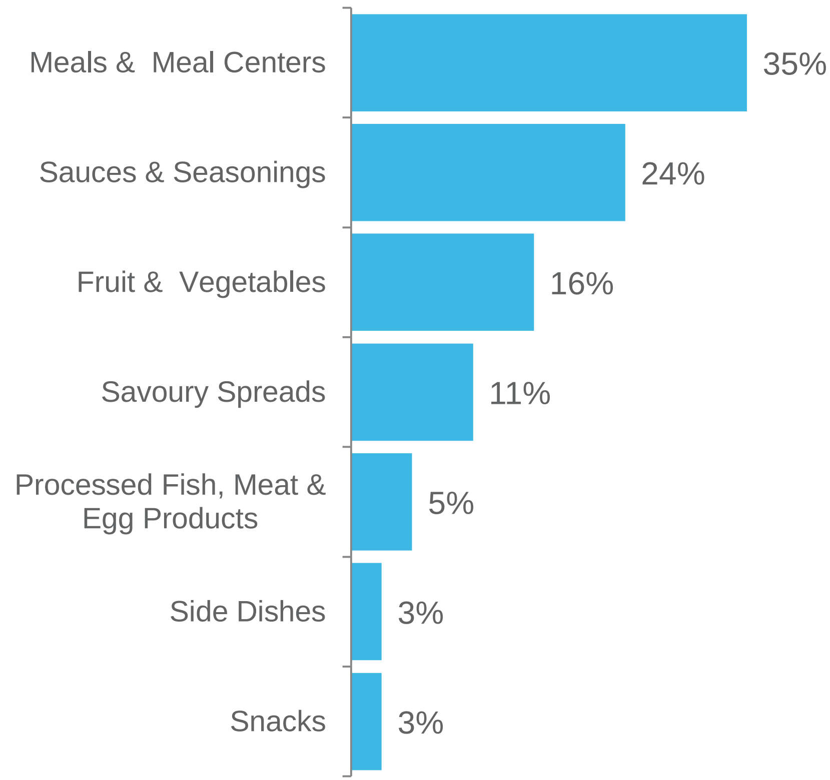
- Countries with the greatest number of launches were Brazil, France and Spain.
- Products launches were primarily meals, sauces, fruit & vegetables and savoury spreads.

Top Launch Countries



75 Global Launches

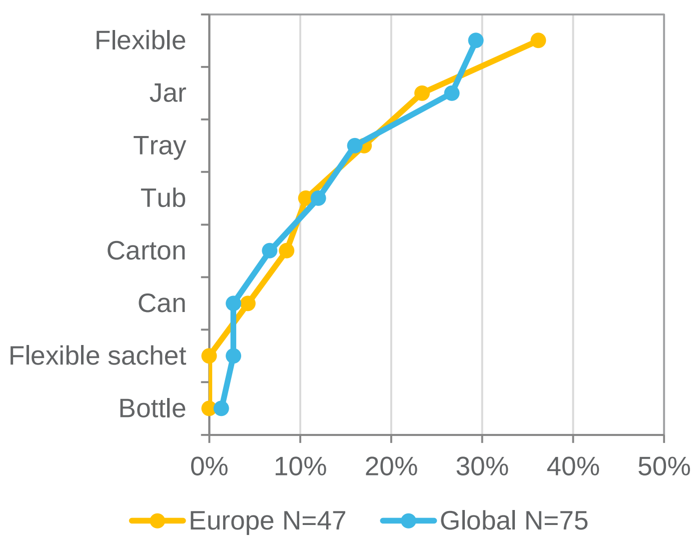
Top Launch Categories



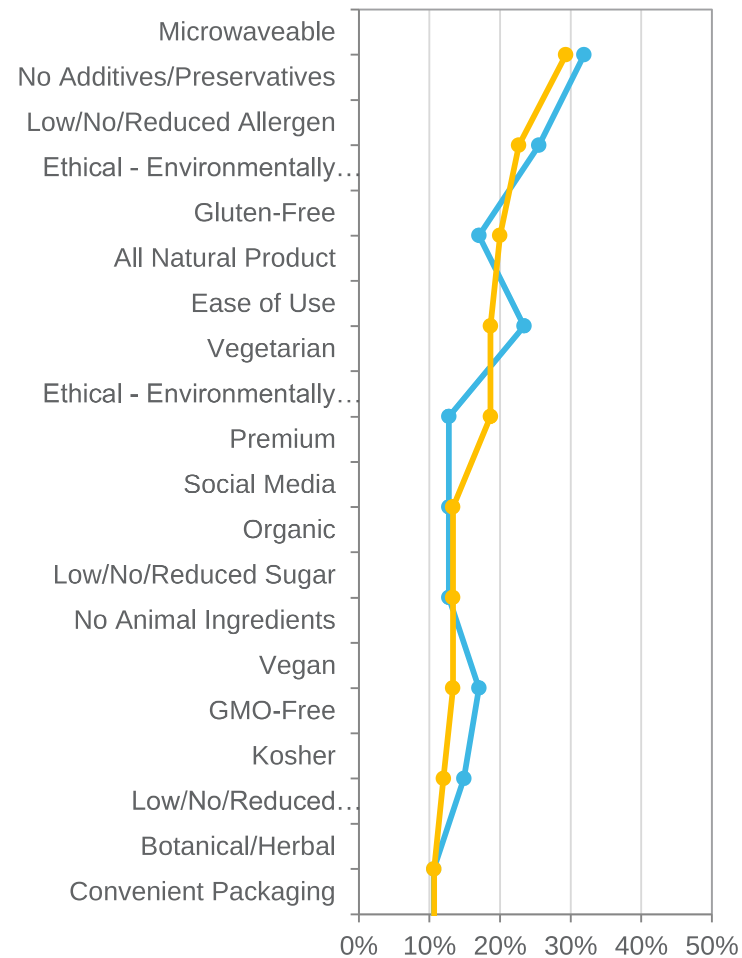
Claims & Pack Formats

- Flexible packaging was used by over a third of products launched. Jars and trays were also popular formats.
- Convenience (microwavable) and health (no additives/preservatives and low allergen) were the key claims used.

Top Pack Formats Launched



Top Claims Launched



Europe N=47 Global N=75

Number of Global NPD for the L3M N=61
Only regions with n >30 are displayed

Innovative Eggplant Launches:
L3M (February – April 2015)

Miratorg Vitamin Sicilian Vegetable Mix (Russia)

Miratorg Vitamin Sitsiliyskaya Smes' (Sicilian Vegetable Mix) is described as a tasty and nutritious Italian dish with a delicate flavour of mushrooms, ripe aubergines and fresh cabbage blossoms. These premium selected vegetables are 100% natural and made by the technology of instant freezing, which retains more vitamins than long stored fresh vegetables .

Claims:
All Natural Product, Premium, Slimming, Microwaveable

Beladri Vegetables Pie (Brazil)

Beladri Empadão de Vegetais (Vegetables Pie) has been repackaged in a newly designed 180g pack featuring the manufacturer's Facebook link. This product is free from gluten, lactose and sugar.

Claims:
Low/No/Reduced Lactose, Gluten-Free, Social Media, Low/No/Reduced Allergen, Low/No/Reduced Sugar

Season's Choice Premium Veggie Fries (USA)

Season's Choice Premium Veggie Fries are breaded Italian-style eggplant fries that are said to be the perfect way to enjoy veggies. The product can be prepared in the conventional oven or deep fryer and retails in a 16-oz. pack that is made from 30% recycled material.

Claims:
Ethical - Environmentally Friendly Package, Premium

Carrefour Eggplant Caviar (Morocco)

Carrefour Caviar d'Aubergine (Eggplant Caviar) can be used for canape, as a dip or for meals. This product retails in a 100g pack featuring a recipe idea.

Claims:
N/A

Source: Mintel (2015)

Innovative Eggplant Launches:
L3M (February – April 2015)

Tesco Finest Moussaka (UK)

Gli Stuzzicanti! Grigliati Melanzane Grigliate in Olio di Girasole (Grilled Aubergines in Sunflower Oil) are now available. The product has a rustic flavour and a light grilling and retails in a 230g jar.

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

Buitoni Bella Napoli Parmigiana Style Pizza (Italy)

Buitoni Bella Napoli Pizza Parmigiana (Parmigiana Style Pizza) has been repackaged and is now available in a newly designed 365g pack, featuring a competition to win prizes, as well as Facebook, YouTube, Instagram, and Pinterest logos.

Claims:
Ease of Use, All Natural Product, Ethical - Environmentally Friendly Product, Social Media

Mare & Monti Aubergine Fillets (Italy)

Mare & Monti Filetti di Melanzane (Aubergine Fillets) are a new addition to the range. The product retails in a 540g pack.

Claims:
N/A

Muscolo di Grano Vegan Salami Slices (Italy)

Muscolo di Grano Affettato Salamella (Vegan Salami Slices) are claimed to be more nutritional than soy, seitan and tofu. This organic product is said to be a complete food, 100% vegetable made from the production of wheat flour, lentils flour and soy, which are rich in iron, fibre and protein.

Claims:
Low/No/Reduced Saturated Fat, Low/No/Reduced Cholesterol, High/Added Fiber, Vegan, Time/Speed, Ease of Use, Organic, No Animal Ingredients

Source: Mintel (2015)

Innovative Eggplant Launches:
L3M (February – April 2015)

Macabee All Natural Eggplant Cutlets (USA)

Macabee All Natural Eggplant Cutlets are suitable for vegans. The kosher certified breaded cutlet is fully cooked and peeled and can be heated and served. The microwavable product is free from cholesterol, additives or preservatives and retails in a 10-oz. pack.

Claims:
No Additives/Preservatives, All Natural Product, Low/No/Reduced Cholesterol, Vegan, Kosher, Microwaveable, Ease of Use, No Animal Ingredients

Tesco Finest Middle Eastern Lamb & Aubergine Filo Pies (UK)

Tesco Finest Middle Eastern Lamb & Aubergine Filo Pies comprise filo pastry with a spiced lamb mince, aubergine and chickpea filling. The product retails in a 335g partly recyclable pack.

Claims:
Ethical - Environmentally Friendly Package, Premium, Ethical - Animal

Aharoni Roasted Aubergine with Tehina (Israel)

Aharoni Roasted Aubergine with Tehina is kosher certified. The product retails in a 250g pack.

Claims:
Kosher

Grial Eggplant in Oil (Ecuador)

Grial Berenjena en Aceite (Eggplant in Oil) is now available. The artisanal product is high in fat and salt, and low in sugar content. It retails in a 210g pack.

Claims:
Low/No/Reduced Sugar

Source: Mintel (2015)

Australian Launch:
L3M (February – April 2015)

Black Swan Pop Up Persian Eggplant Dip

Black Swan Pop Up Persian Eggplant Dip is a new addition to the range. The gluten free product retails in a 200g pack.

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

Stefano's Pasta Sauce with Aubergine

Stefano's Pasta Sauce with Aubergine is described as seasonal, regional and handmade by Ryan Casey. This all natural product is free from preservatives, and is suggested added to pan-fried mushrooms and baby capers, for a quick pasta dish; used as a pizza sauce; or baked with a whole snapper in foil.

Claims:
No Additives/Preservatives, All Natural Product, Ethical - Environmentally Friendly Product, Time/Speed

Raw Materials Roast Vegetable Chilli Pasta Sauce

Raw Materials Roast Vegetable Chilli Sauce is now available. The product is said to be a versatile cooking sauce that can be used for pasta, pizza making, casseroles and curries. It is gluten free and retails in a 500g pack.

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

Source: Mintel (2015)

Zucchini.

Purchase and consumption frequency of zucchini continues to trend upward in Wave 23.

Mainstream retailers continue to be the preferred purchase channel for the majority of consumers. A considerable number of consumers also purchase from specialist retailers.

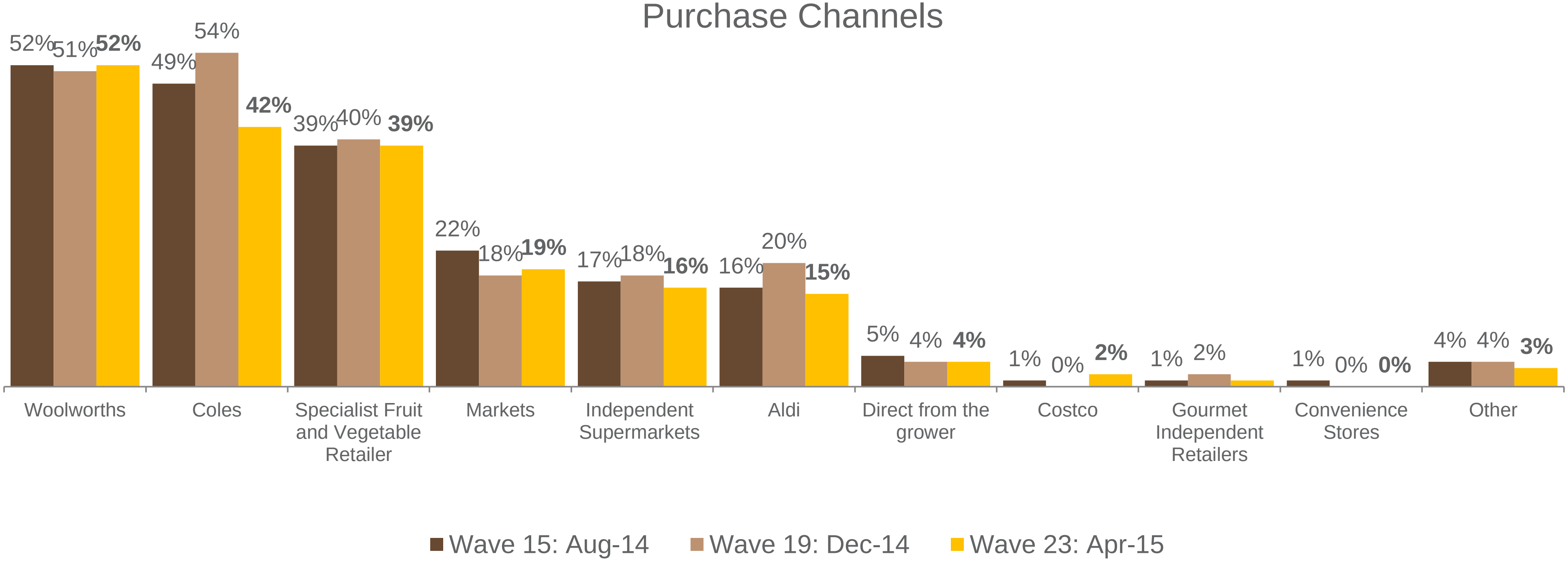
Average Purchase **3.9 times** per month

▼ 3.4 times, Wave 15
▼ 3.5 times, Wave 19

Average Consumption **7.7 times** per month

▼ 7.1 times, Wave 15
▼ 7.3 times, Wave 19

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 15 N=335 , Wave 19 N=357 and Wave 23 N=311

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 average consumer typically purchased **700g** of zucchini per shop. This is consistent with previous waves.

▲ 700g, Wave 15
▲ 700g, Wave 19

Recalled last spend

The average recalled last spend is **$3.10**, which is in line with past waves.

▲ $3.20, Wave 15
– $3.10, Wave 19

Value for money

On average, consumers perceive zucchini to be good value for money **(6.5/10)**, again consistent with the previous wave.

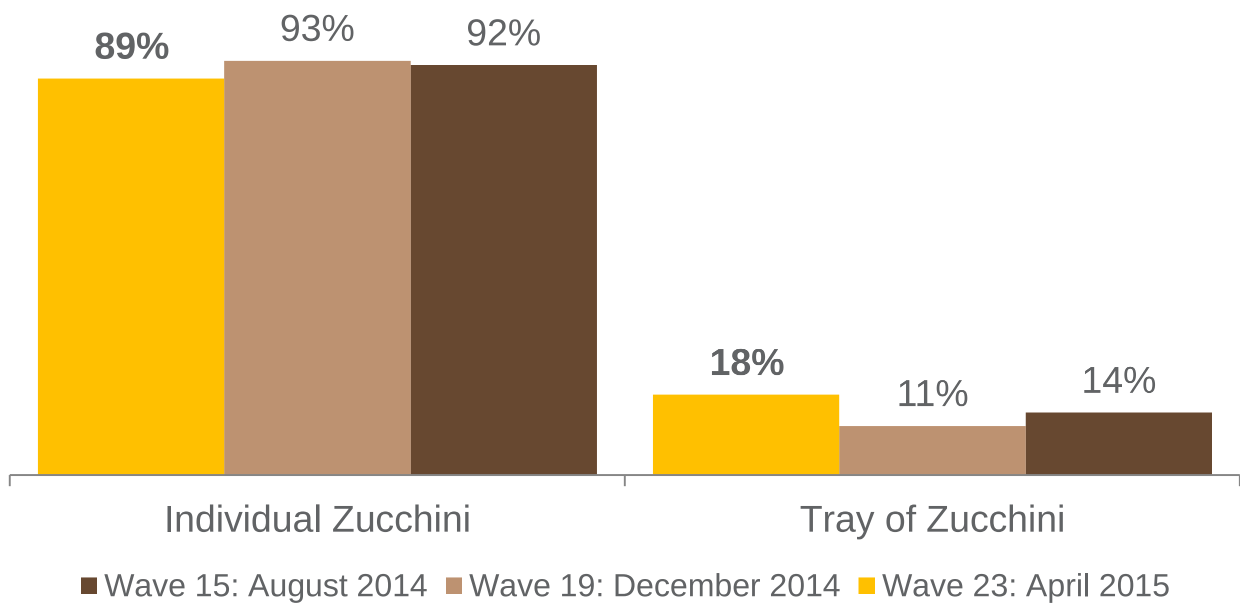
▼ 6.2/10, Wave 15
– 6.5/10, Wave 19

Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is?
Sample Wave 15 N=335 , Wave 19 N=357 and Wave 23 N=311

Horticulture Innovation Australia
colmar brunton.

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

This month sees an increase in the purchase of zucchini trays, however individual zucchinis remain the most common format purchased.

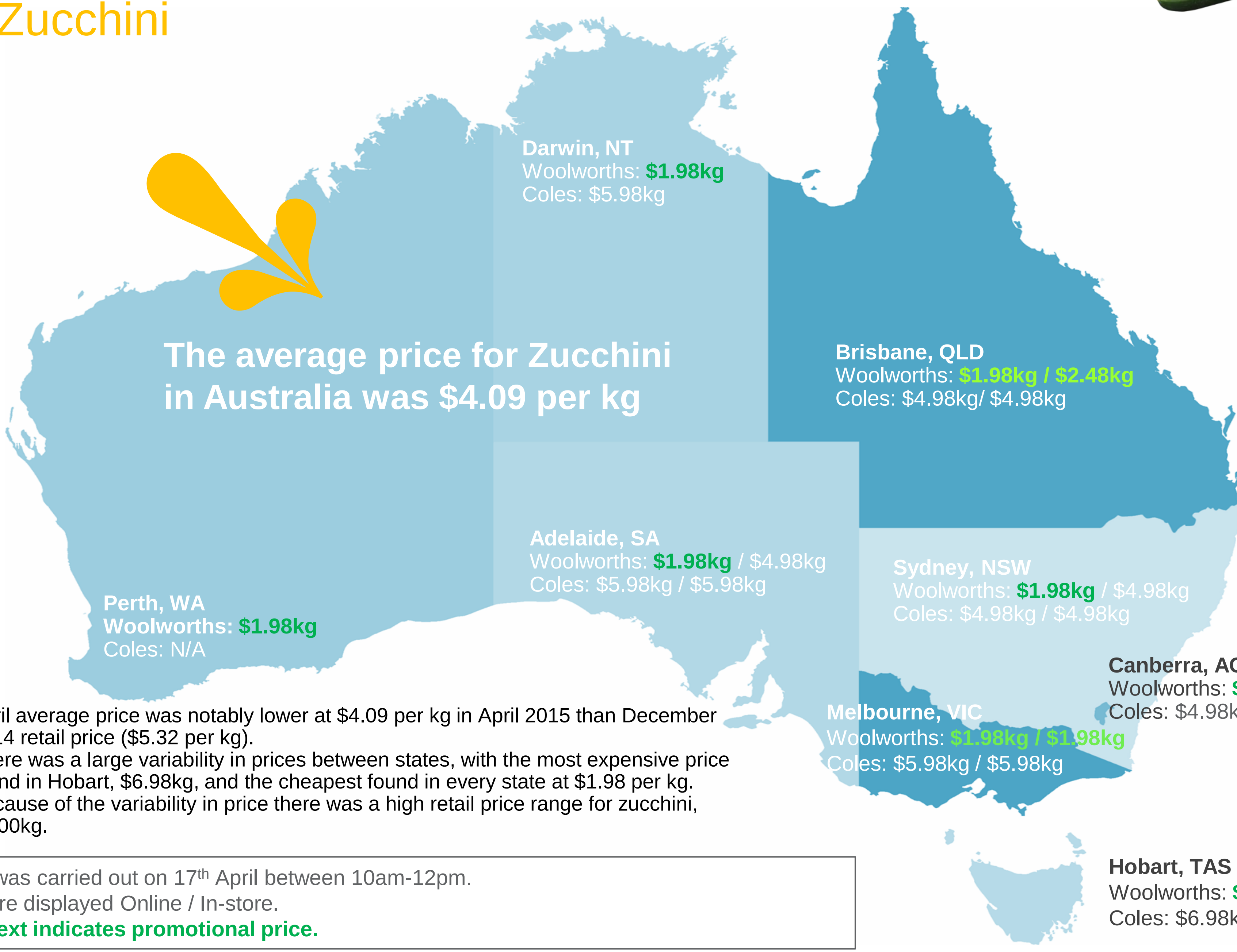


	Individual	Tray
Wave 15	3.2	2.1
Wave 19	3.0	3.3
Wave 23	3.2	2.0

Q3a. How much <commodity> does this typically equate to?
Sample Wave 15 N=335 , Wave 19 N=357 and Wave 23 N=311

Online and In-store Commodity Prices

Zucchini

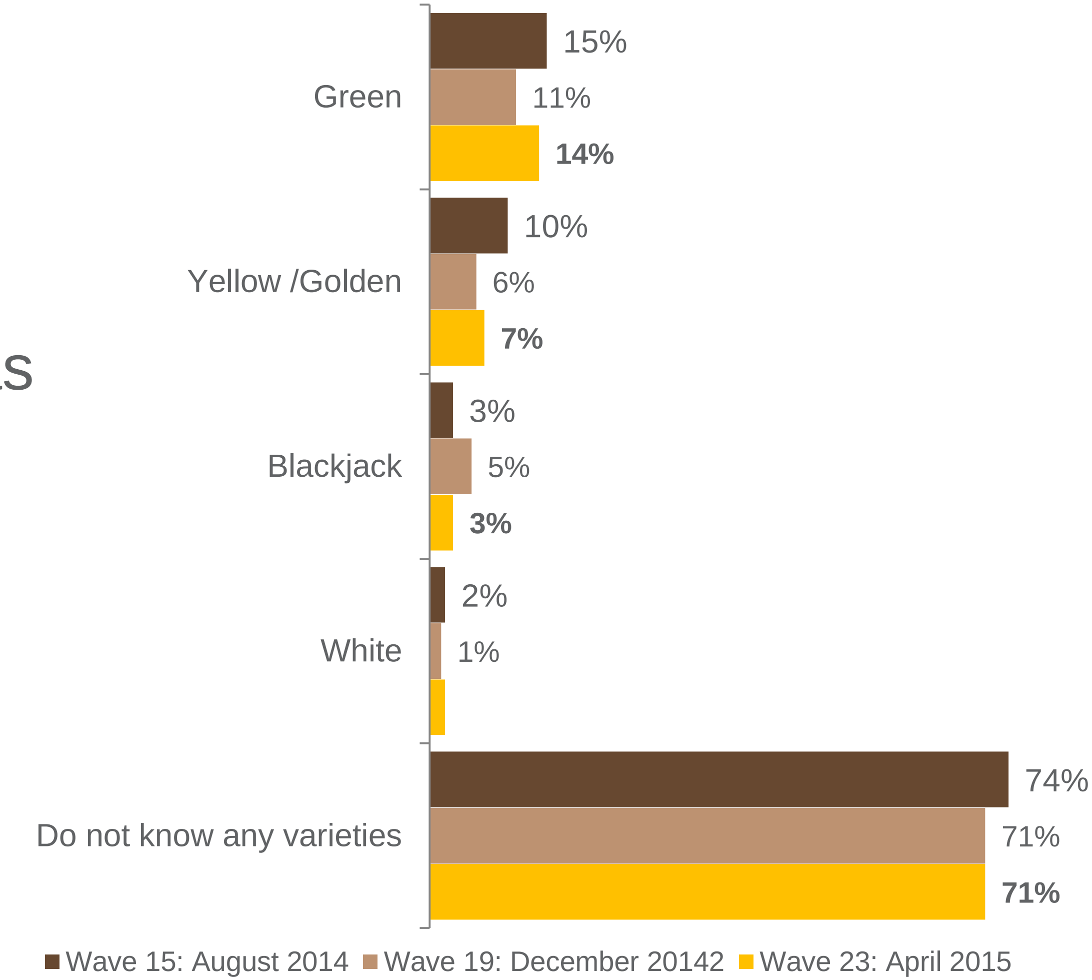


- April average price was notably lower at $4.09 per kg in April 2015 than December 2014 retail price ($5.32 per kg).
- There was a large variability in prices between states, with the most expensive price found in Hobart, $6.98kg, and the cheapest found in every state at $1.98 per kg.
- Because of the variability in price there was a high retail price range for zucchini, $5.00kg.

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

Overall, awareness of zucchini varieties remains very low.

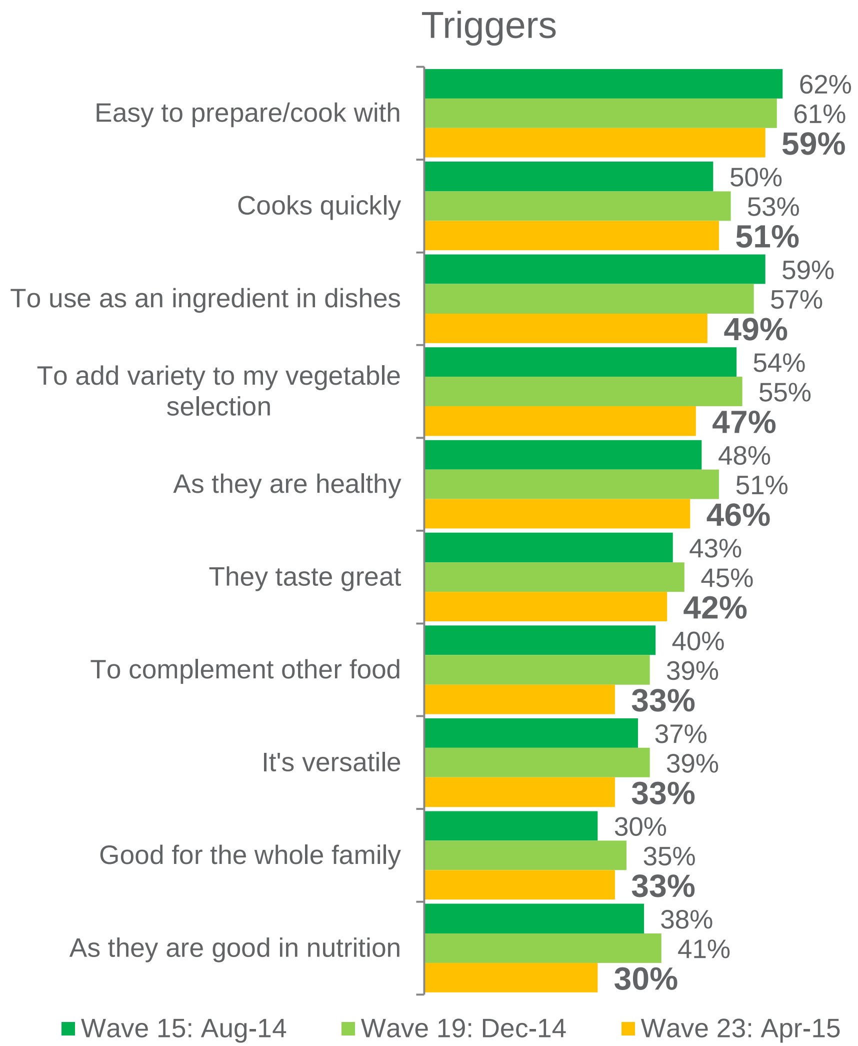
Consumers who recalled types of zucchinis did so mainly by colour. Green has the highest awareness, consistent across waves.

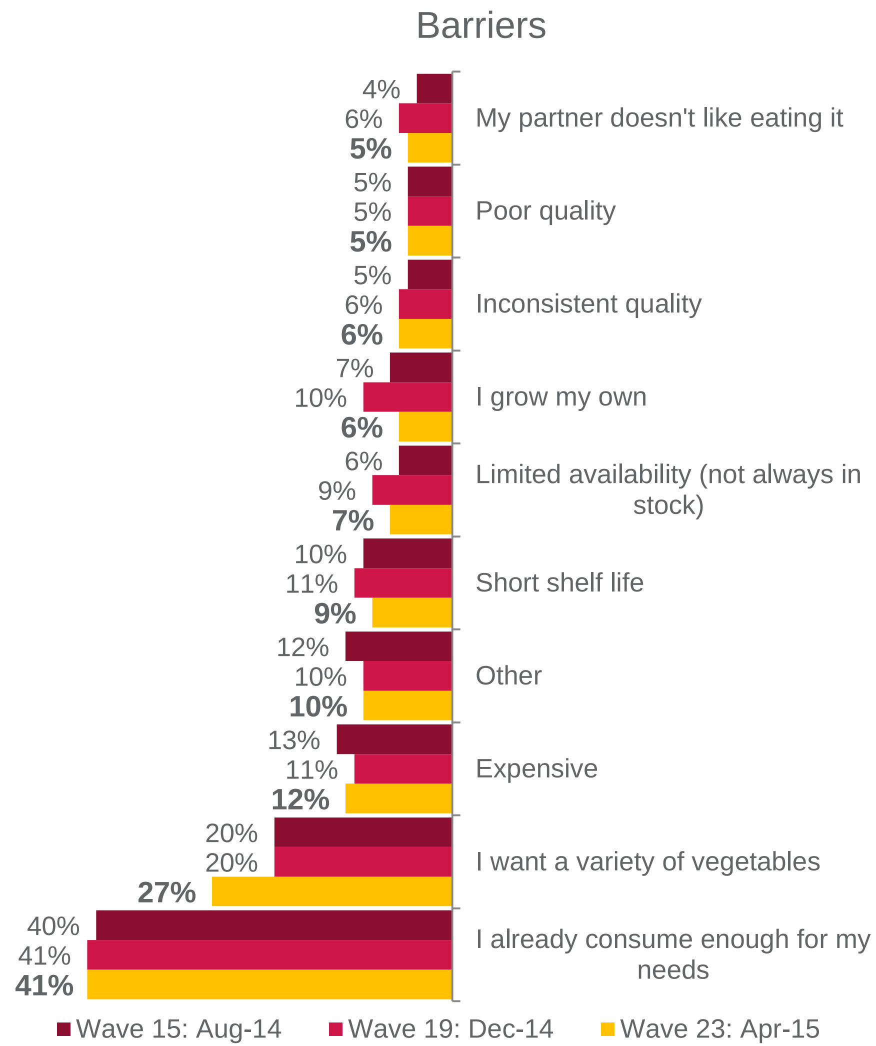


Sample Wave 15 N=335 , Wave 19 N=357 and Wave 23 N=311
Q6a. What varieties of <commodity> are you aware of? (unprompted)

Horticulture Innovation Australia colmar brunton.

Ease of preparation and cooking are the key influences on purchase. The main barriers to purchase are that people already consume enough for their needs and want to buy a variety of vegetables, with the latter increasing from previous waves.





Sample Wave 15 N=335 , Wave 19 N=357 and Wave 23 N=311
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?

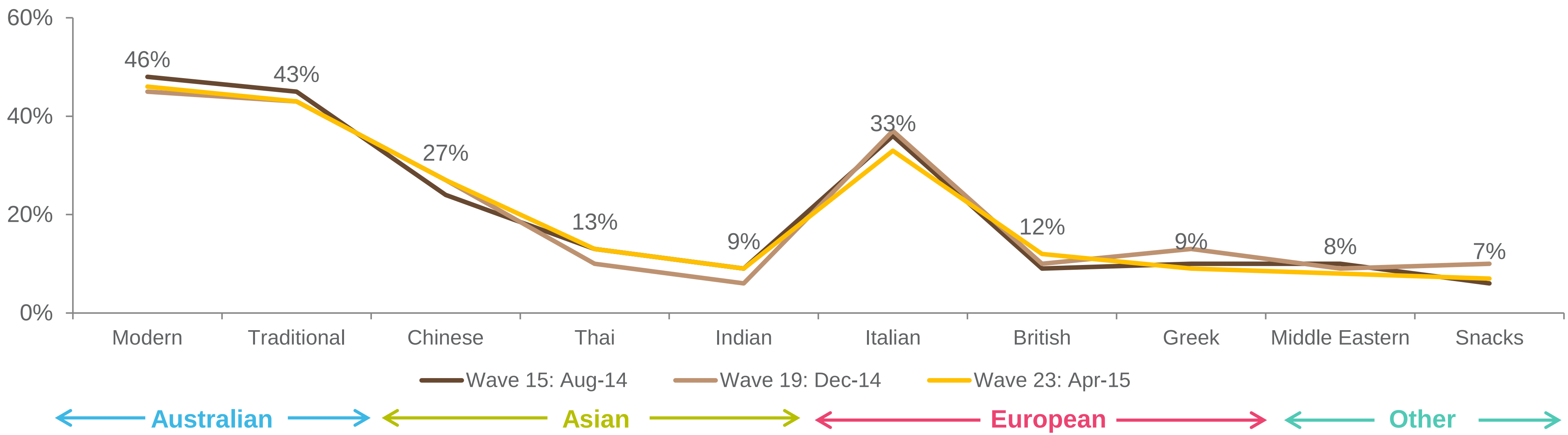
Consumers prefer to cook zucchinis in Australian and Italian cuisine, with the former experiencing a small decline over the previous wave.

The main consumption occasion for zucchinis are weekday dinners, which has maintained a considerable preference over other meal occasions.

Top 5 Consumption Occasions

	Wave 23	Wave 19	Wave 15
Weekday Dinner	**58%**	59%	62%
Weekend Dinner	**41%**	37%	37%
Quick Meals	**28%**	34%	32%
Family meals	**38%**	36%	30%
Every-day	**32%**	30%	28%

Typical Cuisine Cooked



Sample Wave 15 N=335 , Wave 19 N=357 and Wave 23 N=311
Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?

Horticulture Innovation Australia

colmar brunton.

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

Serving of zucchini with carrots has increased and still remains the most popular combination. Potatoes continue to increase in popularity, with an upward trend continuing through recent waves.

Stir-frying remains the main cooking technique used. Steaming continues to be popular, while soup has improved, on par with the change in season.

Accompanying Vegetables

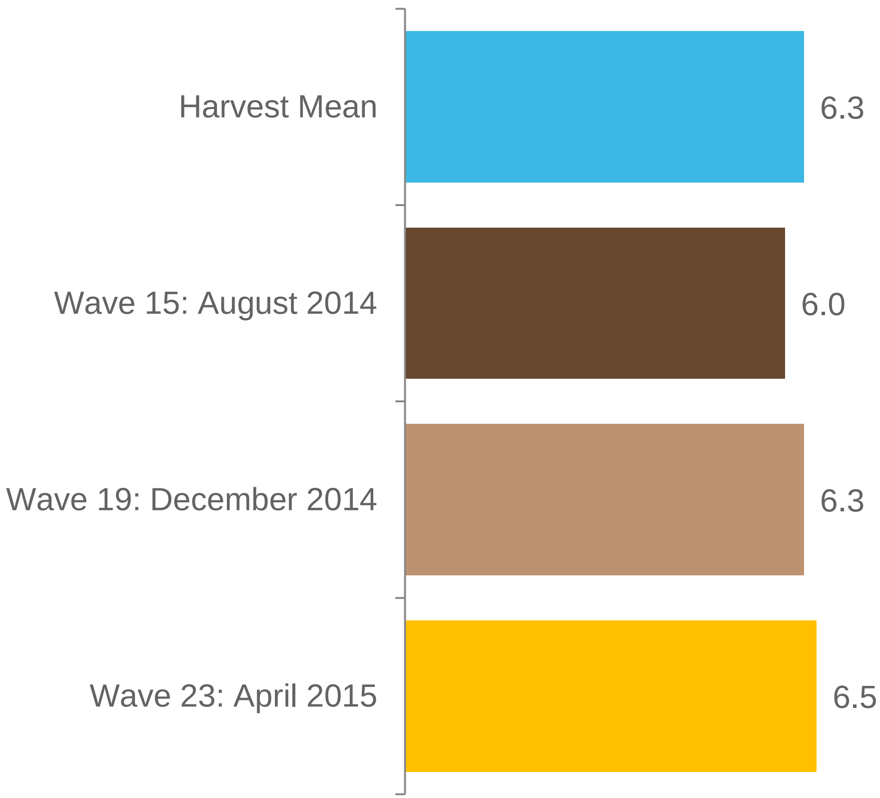
- Carrot 57% ▲
- Potato 45% ▲
- White Onion 34% ▼
- Broccoli 33% ▲
- Tomato 30% ▼

Top Cooking Styles

	Wave 15	Wave 19	Wave 23
Stir frying	51%	55%	46%
Steaming	35%	40%	39%
Roasting	22%	27%	25%
Baking	30%	22%	25%
Soup	23%	17%	23%
Sautéing	21%	28%	21%
Grilling	19%	22%	18%
Microwave	15%	20%	16%
Stewing	19%	15%	15%
Boiling	16%	17%	14%

Sample Wave 15 N=335 , Wave 19 N=357 and Wave 23 N=311
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?

The importance of provenance has increased across waves, demonstrating an increasing trend that now sits above the Harvest mean.



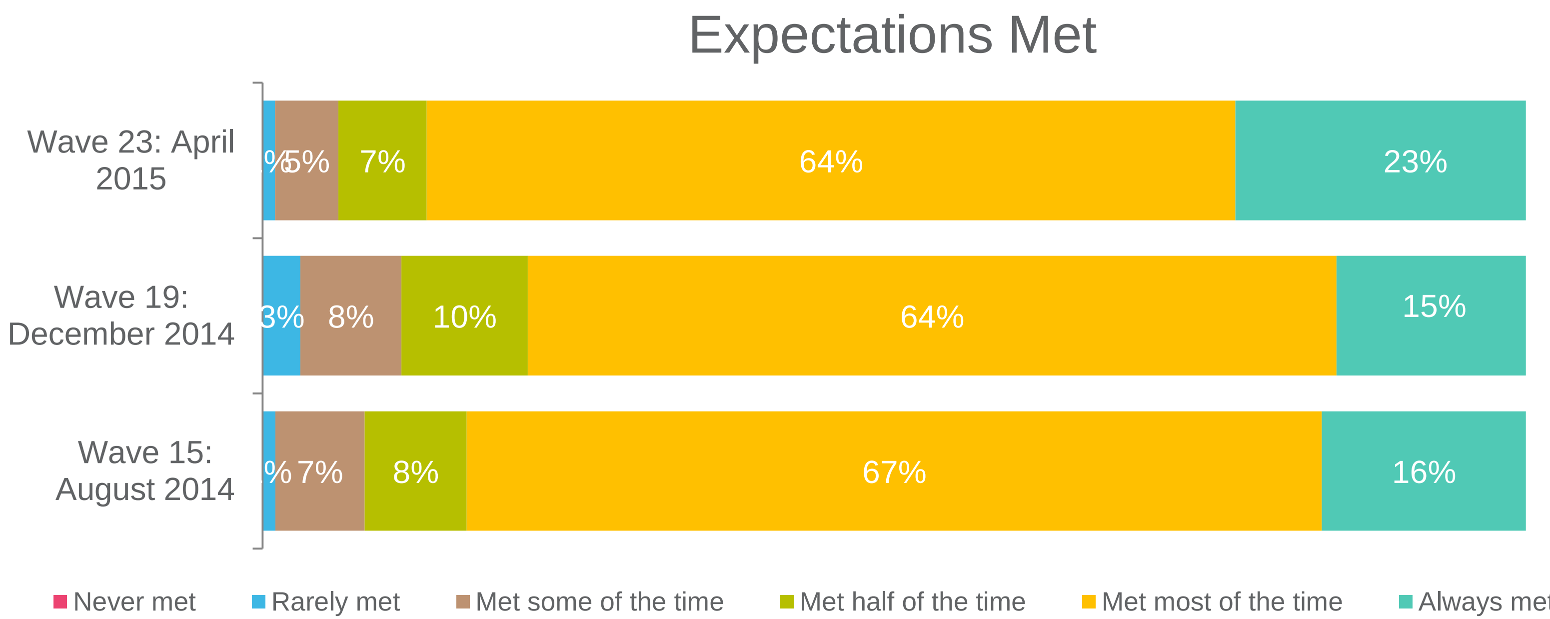
Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 15 N=335 , Wave 19 N=357 and Wave 23 N=311

Consumers expect zucchini to remain fresh for eight days, which has remained relatively stable across seasons.

Expectations of freshness sees an increase, with almost 9 out of 10 consumers having their expectations met at least most of the time.

Expected to stay fresh for **7.9** days

▲ 8.1 days, Wave 15
▼ 7.8 days, Wave 19



Sample Wave 15 N=335 , Wave 19 N=357 and Wave 23 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> ?

Horticulture Innovation Australia

colmar brunton.

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

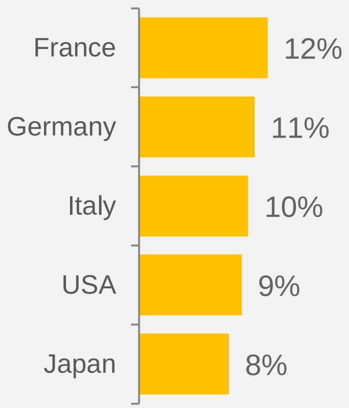
Trends: Zucchini

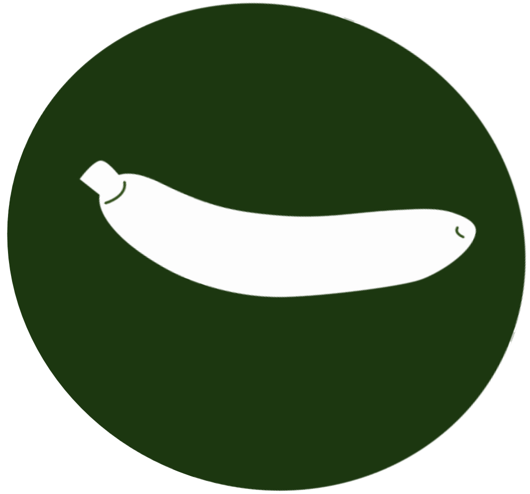
Zucchini Global Launches

February – April 2015

There were 169 zucchini products launched in the last three months. The majority of launches occurred in Europe, and specifically France, Germany and Italy. Key categories for launches were meals, fruit & vegetables and soup.

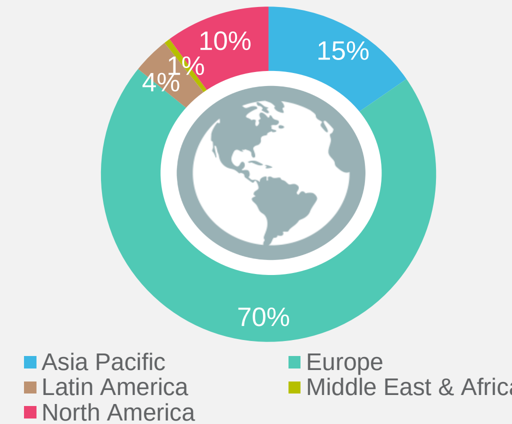
Country



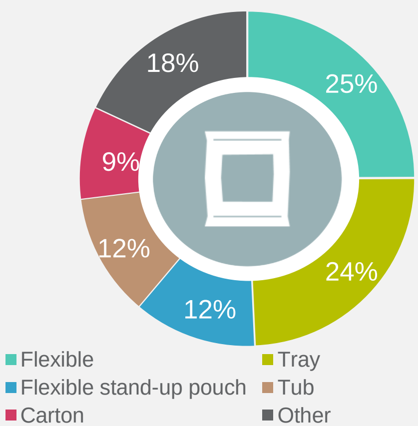


169 Global Launches

Region



Top Pack Formats



Categories

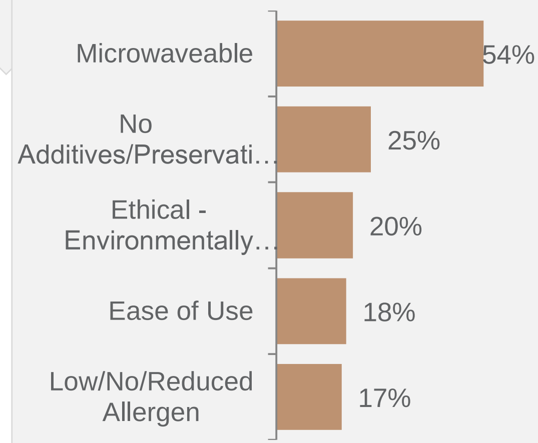
Meals 40%

Fruit & Vegetables 15%

Soup 11%

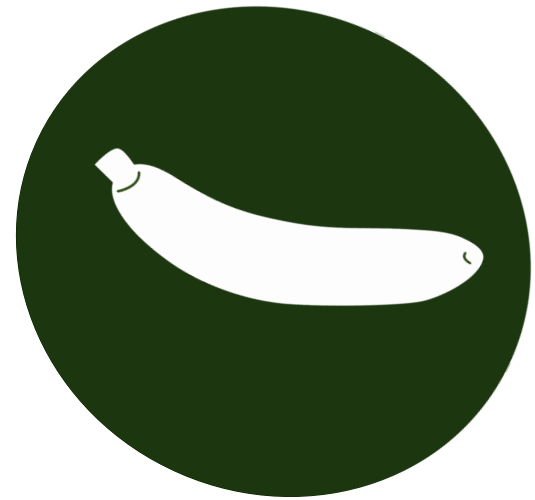
Baby Food 9%

Top Claims



Zucchini Product Launches:
L3M (February – April 2015)
Summary

- There were 169 products launched globally in the last three months. This was consistent with past trends.
- Domestically, there were only three products launched that contained zucchini as an ingredient, including lasagne and soup products.
- Launches predominantly occurred in Europe (70%), followed by Asia Pacific (15%).
- The most common packaging used for launches were flexible (25%) and tray (24%) formats.
- Meals (40%), fruit & vegetables (15%) and soup (11%) were the main categories for launches, consistent with past waves.
- Microwavable (54%) remained the most common claim used for products. No additives/preservatives (25%) was also frequently used.
- The most innovative launches were meal products, including side dishes (examples of these can be found in the following pages).

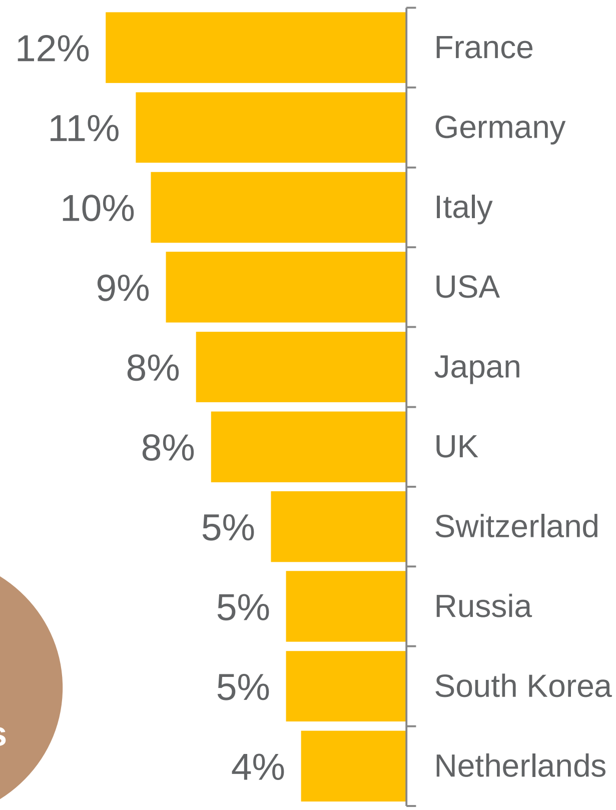


Source: Mintel (2015)

Zucchini Launches

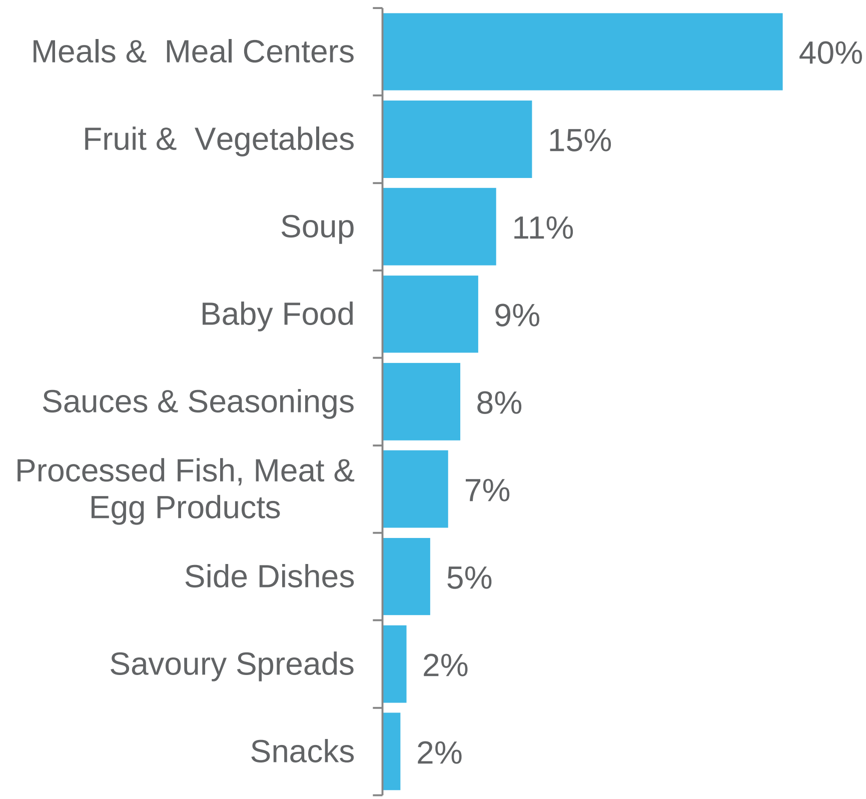
- France was the key country for launches over the last three months, followed by Germany and Italy.
- Top categories for products were meals, fruit & vegetables and soup.

Top Launch Countries



169 Global Launches

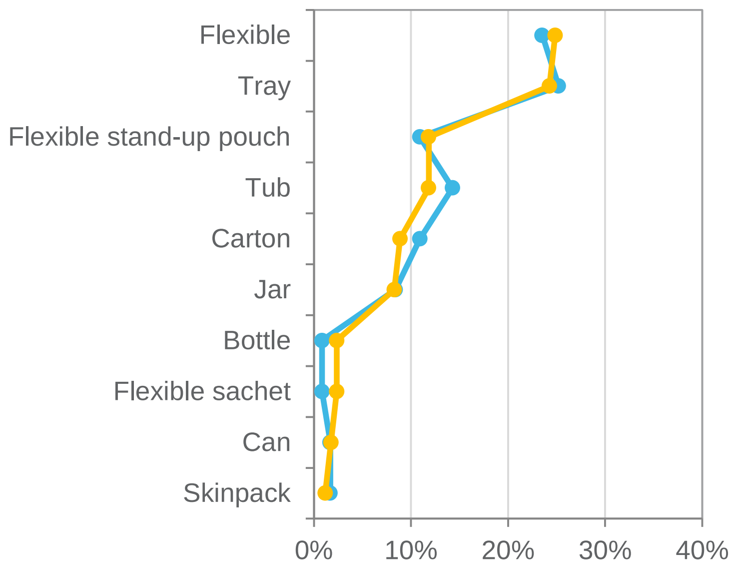
Top Launch Categories



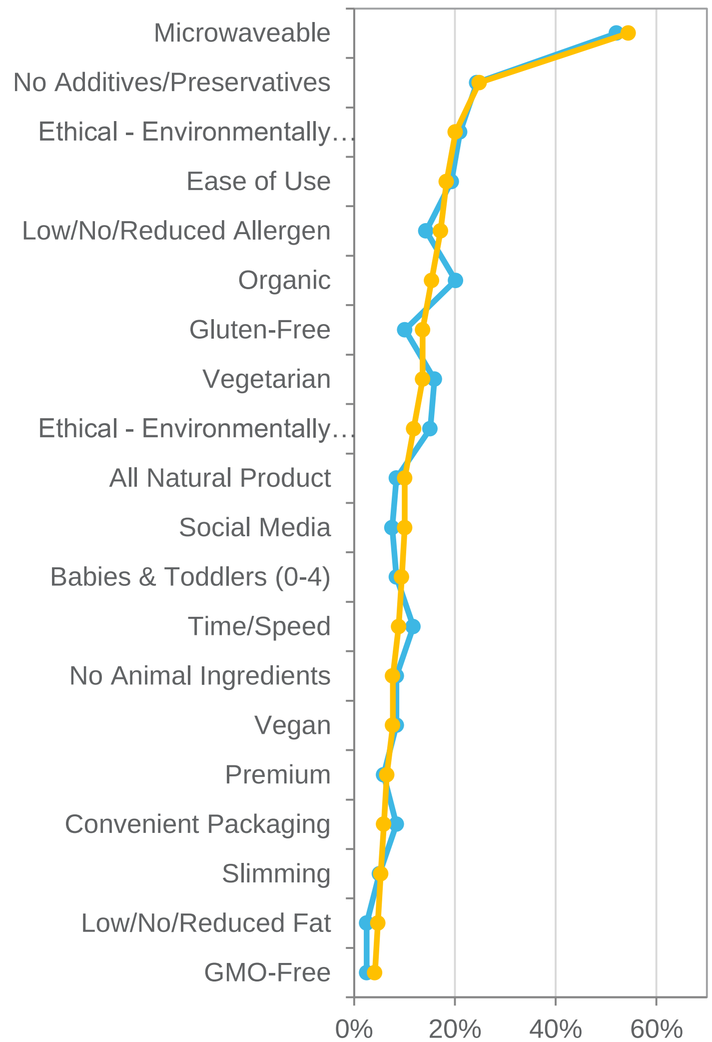
Zucchini Launches

- Flexible and tray packaging were the most common format used for zucchini products, consistent with past months.
- Microwavable remains the key claims used on zucchini products.

Top Pack Formats Launched



Top Claims Launched



Europe N=119 Global N=169

Only regions with n >30 are displayed

Innovative Zucchini Launches:

L3M (February – April 2015)

You Xian Di Zhi Su Xian Egg and Courgette Dumplings (China)

You Xian Di Zhi Su Xian Ji Dan Xi Hu Lu Shui Jiao (Egg and Courgette Dumplings) are said to be low in fat, and are suitable for vegetarians. This halal product is hand made, and retails in a 545g pack.

Claims:
Halal, Vegetarian, Low/No/Reduced Fat

Frecious Dainty Tarragon Vegetable Smoothie (France)

Frecious Dainty Tarragon Légumes Fouettés (Dainty Tarragon Vegetable Smoothie) is made with courgette, tarragon, cashew nuts, lemon and sea salt. The product can be used raw or cooked to dress up vegetables, grains, pasta, fish and meats, revive leftovers, make a dip, drizzle in soups or spread over bread. It is certified organic and retails in a 170g pack.

Claims:
Organic

Sadia Zucchini Pie Filling (Argentina)

Sadia Relleno para Tartas Zapallitos (Zucchini Pie Filling) is now available. This microwaveable product is made with selected vegetables and retails in a 500g pack.

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

Baby Kiss Pea and Zucchini Creamy Soup (Germany)

Baby Kiss Pea and Zucchini Creamy Soup is now available. It is suitable for babies from six months of age onwards and is enriched with vitamins, calcium and iron. It is quick and easy to prepare and contains organic vegetables not treated with chemical pesticides or fertilisers.

Claims:
Vitamin/Mineral Fortified, Added Calcium, Convenient Packaging, Ethical - Environmentally Friendly Product, Time/Speed, Ease of Use, Organic, Babies & Toddlers (0-4)

Source: Mintel (2015)

Innovative Zucchini Launches:
L3M (February – April 2015)

Barilla Piccolini Mini Penne Rigate Pasta with Courgette and Spinach (Switzerland)

Barilla Piccolini Mini Penne Rigate con Zucchine e Spinaci (Mini Penne Rigate Pasta with Courgette and Spinach) have been repackaged. This product is made with 25% vegetable purée and 100% natural ingredients, from fresh vegetables and cooks in six minutes. The product is targeted at children and retails in a 400g pack featuring a recipe suggestion.

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

O Organics Organic Summer Vegetables Baby Food (USA)

O Organics Organic Summer Vegetables Baby Food has been relaunched, being previously available under the O Organics for Baby brand. This stage 3 food is suitable for babies from eight months and older. The USDA organic certified product meets the highest standards for no GMOs, and retails in a newly designed 4-oz. pack.

Claims:
Organic, Babies & Toddlers (0-4), GMO-Free

Nosh Raw Veggie Courgette, Pineapple & Mint Smoothie (UK)

Nosh Raw Veggie Courgette, Pineapple & Mint Smoothie is claimed to balance, promote weight loss and improve the digestive system. This raw product is not heat-treated and provides the benefits of all the live vitamins, minerals, enzymes and nutrients of raw food on the go. It is free from gluten, dairy, GM and added sugars and is suitable for vegans.

Claims:
Immune System (Functional), Low/No/Reduced Allergen, GMO-Free, Social Media, Other (Functional), On-the-Go, Low/No/Reduced Sugar, Slimming,

Garbo Breaded Zucchini Flowers Filled with Anchovies and Mozzarella Cheese (Italy)

Garbo Fiori di Zucca in Pastella con Alici e Mozzarella (Breaded Zucchini Flowers Filled with Anchovies and Mozzarella Cheese) are now available. The product can be cooked in a pan fry or in the oven and retails in a 500g pack.

Claims:
N/A

Source: Mintel (2015)

Innovative Zucchini Launches:
L3M (February – April 2015)

Global Cuisine El Mundo Quinoa Mix with Zucchini & Onions (Switzerland)

Global Cuisine El Mundo Quinoa avec Courgettes et Oignons (Quinoa Mix with Zucchini & Onion) is now available. The microwaveable product is suitable for vegetarians and vegans, contains Fairtrade certified ingredients, is free of flavour enhancers, and retails in a 225g pack.

Claims:
No Additives/Preservatives, Vegan, Ethical - Human, No Animal Ingredients, Vegetarian, Microwaveable

Dr. Praeger's California Veggie Burgers (USA)

Dr. Praeger's California Veggie Burgers have been repackaged in a redesigned 11-oz. recyclable pack, which are said to have the same great taste and contain four individually wrapped units. The packaging features the Facebook, Twitter and Pinterest logos.

Claims:
All Natural Product, Low/No/Reduced Allergen, Low/No/Reduced Cholesterol, GMO-Free, Kosher, Vegan, Ethical - Environmentally Friendly Package, Social Media

Fraîcheur Florette Courgette Sticks (France)

Fraîcheur Florette Julienne de Courgette (Courgette Sticks) are now available. This ready-to-use product retails in a 400g pack.

Claims:
Ease of Use

Soupologie Super Boost Watercress Courgette & Quinoa Soup (UK)

Soupologie Watercress Courgette & Quinoa Soup is described as combination of the very best watercress and delicate courgette and nutty pseudo-grain quinoa containing wealth of antioxidants alongside vitamin C that contributes to healthy bones and skin.

Claims:
Low/No/Reduced Lactose, Vitamin/Mineral Fortified, Low/No/Reduced Allergen, GMO-Free, Other (Functional), Social Media, Low/No/Reduced Sugar, Microwaveable, Gluten-Free, No Animal Ingredients

Source: Mintel (2015)

Australian Zucchini Launches:
L3M (February – April 2015)

La Gina La Zuppa Vegetable and Bean Soup

La Gina La Zuppa Vegetable and Bean Soup is made with the finest and freshest ingredients to a traditional recipe and is described as a wholesome soup with hearty vegetables and beans.

Tutto Pasta Gluten Free Vegetarian Lasagna

Tutto Pasta Gluten Free Vegetarian Lasagna has been repackaged. It comprises layers of cooked vegetables topped with traditional Napoletana sauce and is 97% fat free. This microwaveable product retails in a newly designed 450g large-serve pack.

Heinz Soup of the Day 7 Veg with Garden Herbs Soup

Heinz Soup of the Day 7 Veg with Garden Herbs Soup is described as a fresh look at an old favourite. The soup is made with chopped, gently simmered and carefully combined quality ingredients. The goodness and flavour are locked in a foil fresh pack so that there is no need for preservatives.

Source: Mintel (2015)

In the Media.

General Vegetable News
(February – April 2015)

- Coles supermarket will establish a $50 million 'Nurture Fund' over 5 years that will help small Australian farmers and manufacturers innovate and develop their businesses. The fund will allocate grants and interest free loans to fund the development of new products, technologies and processes.

- Woolworths home brand recently switched their frozen vegetables to Australian grown and seen significant sales growth, highlighting the power of local provenance on purchase.

Source: Australian Food News and abc.net.au

Commodity News
(February – April 2015)

Eggplants are an edible fruit, part of the nightshade family. They are a good source of fibre and potassium. They should be stored at room temperature to reduce ‘chilling injuries’ that damage their texture and flavour.

www.utsandiego.com

To ensure the highest levels of antioxidants, celery should be consumed within seven days of purchasing it. Additionally, don’t chop up celery bunches and stalks until you are ready to use. Use celery raw or steamed to retain most of its nutrients, rather than boiling and blanching.

www.livescience.com

Cucumbers are made up of 95% water by weight and naturally low in calories, cholesterol and sodium. Cucumbers are highly versatile and can be used in juices, salads, eaten raw or fermented.

www.freshplaza.com

Zucchinis are made up of 75% water by weight. They are rich in fibre and contain vitamins A and C, potassium and iron. They can be eaten raw and a great substitute for pasta.

www.beliefnet.com

Background & Methodology.

Background
& Setting the Scene.

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

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

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

This wave's report (Wave 23, April 2015) focuses on:

- Celery
- Cucumber
- Eggplant
- Zucchini

This is the sixth wave of tracking for these specific commodities, and as such, the current report will bring to light any change 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 are recruited via an Online Panel. If the respondents meet the recruitment requirements of sufficient vegetable consumption (monthly) they are asked to complete the online questionnaire.
- All respondents complete general demographic and consumption questions. If respondents purchased any of the specific commodities within the last month they then complete those questions. A minimum of N=300 respondents per commodity completed the questionnaire.
- Topics covered in the questionnaire are vegetable purchase and consumption, category health, price and value perceptions, triggers and barriers to purchase and preparation and cooking preferences.
- An additional 2 ad-hoc questions are asked at the end of the questionnaire. The subjects of these questions are supplied by Horticulture Innovation Australia prior to each month to get feedback on topics of interest at that time.
- The questionnaire takes 15 minutes to complete.
- Questions asked appear on the bottom of each page of this report. Unless stated otherwise, all scales were 0 -10 scales, with higher scores indicating greater agreement/liking/importance etc.

General Respondent Questions

Demographics

Vegetable Consumption

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

Commodity Specific Questions

Category Health

Purchase & Consumption Habits

Price Perceptions & Average Spend

Triggers/Barriers to Purchase

Preparation Preferences

+ 2 Ad hoc Questions per Month

Sample.

In total, 663 respondents completed the questionnaire this wave. Respondents represent most states and territories, as well as both metro and rural areas.

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

To qualify for the questionnaire, respondents...

⇛Are aged 18 years and over

⇛Purchase fresh vegetables at least once a month

⇛Purchase at least one of the monthly commodities (Celery, Cucumber, Eggplant & Zucchini) within the last month

⇛Are the main or joint grocery buyer

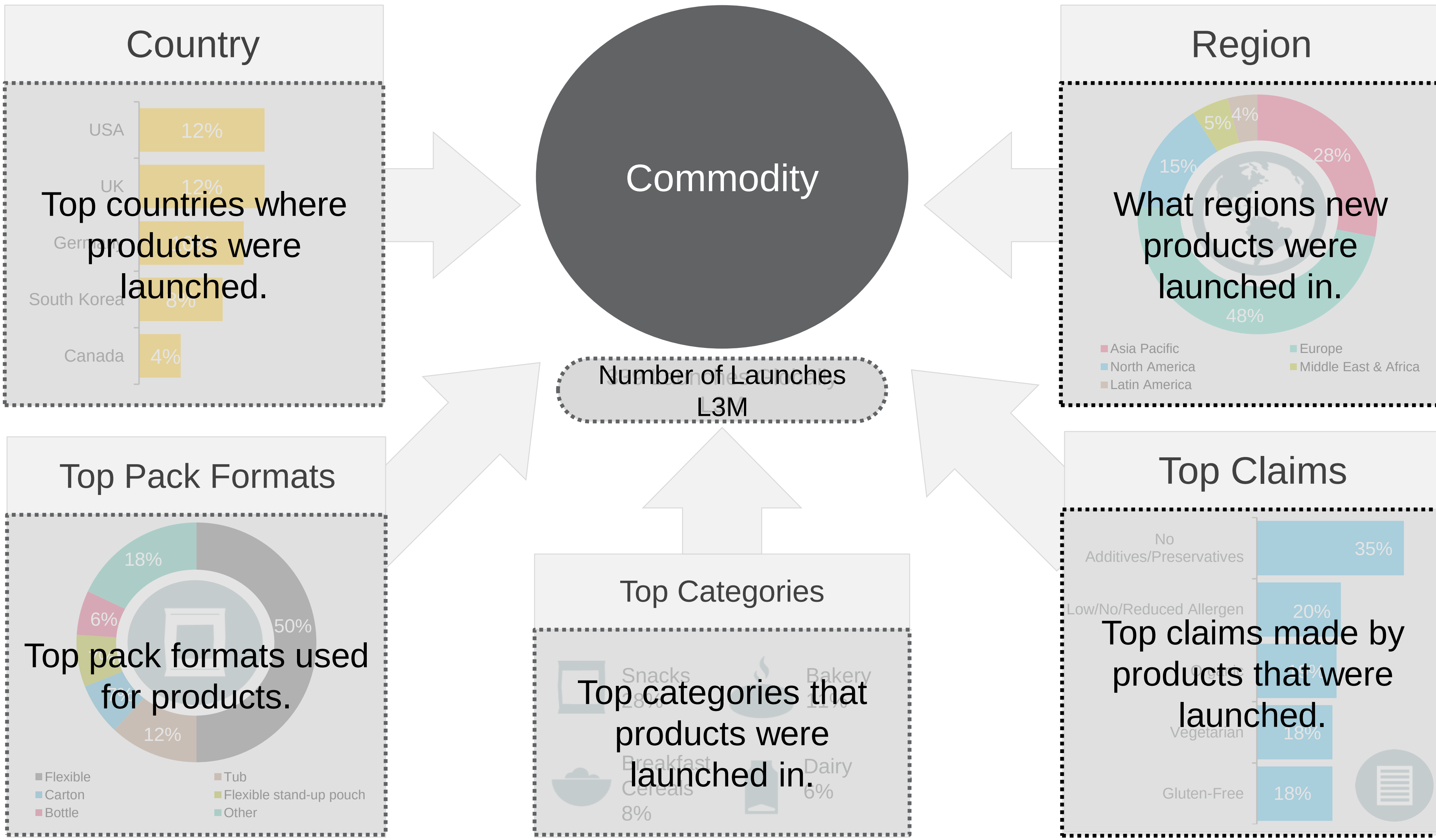
	Total N=663	Celery n=310	Cucumber n=308	Eggplant n=303	Zucchini n=311
Gender					
Male	38%	41%	36%	38%	38%
Female	62%	59%	64%	62%	62%
Age					
18-24 y.o.	7%	8%	6%	9%	6%
25-34 y.o.	20%	17%	18%	25%	17%
35-44 y.o.	17%	19%	16%	17%	17%
45-54 y.o.	18%	15%	18%	17%	19%
55-64 y.o.	20%	18%	21%	20%	22%
65+ y.o.	18%	22%	21%	13%	20%
Household					
Single Income no Kids	19%	22%	20%	16%	18%
Double Income no kids	19%	17%	20%	20%	21%
Young Families	19%	19%	17%	21%	18%
Established Families	22%	20%	23%	24%	20%
Empty Nesters	21%	23%	20%	18%	23%
Location					
New South Wales	24%	23%	20%	32%	16%
Victoria	22%	23%	20%	21%	23%
South Australia	13%	12%	14%	11%	16%
Queensland	20%	19%	22%	17%	23%
Western Australia	16%	17%	18%	14%	16%
Tasmania	2%	2%	2%	2%	2%
Australian Capital Territory	3%	4%	3%	2%	4%
Northern Territory	1%	0%	0%	1%	1%

Trends Research: Our Approach

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

Product Launches Last 3 Months (L3M)
How to Read Summaries

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



Thanks.