Monthly Tracker Report Wave 24:
Asian Vegetables, Beetroot, Capsicums & Sweetpotatoes

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Wave 24: Executive Summary

Industry Insight

What makes superfoods so super?

Superfoods are commonly defined as those with an unusually high content of antioxidants, vitamins or other nutrients that can have health promoting properties such as reducing the risk of disease or improving physical, mental or emotional health.

Being labelled as a “superfood” can result in soaring sales and a proliferation of associated by-products. This has been most recently witnessed for beetroot, sales of which are set to soar to over £1 million per week in the UK due to its highly publicised nutritive powers in relation to blood pressure, cholesterol and degenerative disease. Similarly in Australia, beetroot juice, beetroot stamina shots, beetroot chips and even inedible products such as beetroot based eye-masks are amongst the by-products available for those looking for an edge in health, beauty or performance.

There are many other vegetables that have been touted as superfoods (including Brussels Sprouts, Broccoli, Kale, Spinach, Swiss Chard, Pumpkin and Sweetpotato) and it will only be a matter of time before the next is “discovered”. Indeed, all vegetables contain health promoting vitamins and antioxidants, so it may be as simple as adding clinical evidence to the anecdotal and bracing for the marketing ride of a lifetime.

Fast Facts

(1 of 2)

Asian Vegetables:

- Asian vegetables have positive consumer sentiment and propensity to purchase, consistent with previous months.
- Asian vegetables are purchased 5 times per month and are consumed 9 times per month, the former slightly higher and the latter marginally lower in comparison to previous waves.
- Consumers purchase 1kg of Asian vegetables per shop. Recalled last spend is $5.90. Overall, consumers perceive Asian vegetables to be good value for money.
- National price tracking indicated the average price for Bok Choy in May was $2.12, which is relatively consistent between state and retailers.
- Awareness has improved, with just over three quarters of consumers able to recall a type. Bok Choy remained the most recalled type of Asian vegetable, followed by Choy Sum and Wombok.
- Asian vegetables are expected to stay fresh for just over 5 days, and freshness expectations are met most of the time. Asian vegetables appear to be largely unaffected by seasonal changes.
- Ease of preparing and short cooking times are the main influences on purchase of Asian vegetables. Consuming enough for their needs and limited availability are primary barriers to purchase.

Beetroot:

- Beetroot has strong levels of endorsement, indicating consumers are happy to recommend to family and friends. Future propensity to purchase is high.
- Beetroot is purchased approximately 3 times per month. Consumption of beetroot occurs 8 occasions per month, down from the previous wave.
- On average, consumers purchase 1kg of beetroot. Recalled last spend was $4.70. Overall, consumers perceived good value for money.
- Pricing analysis revealed both loose and bunched beetroot could be purchased from most mainstream retailers. Average price per kilo in May is $4.09, relatively consistent between state and retailers.
- Awareness of beetroot types is very low, with two thirds of consumers unable to recall a type.
- Beetroot is expected to remain fresh for over 10 days. Freshness expectations have increased and are generally met by consumers.
- Taste and health remain the key triggers to purchase, however decreasing since the last wave. The main barriers to future purchase are consuming enough and wanting variety.

Fast Facts

(2 of 2)

Sweetpotato:

- Sweetpotato has strong consumer sentiment, however satisfaction sits just below the Harvest mean.
- Purchase of sweetpotato occurs 3 times per month and is consumed 7 times per month, down slightly from the last wave. Purchase is typically from mainstream retailers.
- Overall, sweetpotato is perceived to be good value for money (6.4/10). Consumers on average purchase 1.0kg, typically loose. Recalled last spend is $3.50.
- Price tracking for May 2015 revealed an average price of $4.96 per kilogram, down from January prices.
- Roughly two thirds of respondents cannot recall a variety of sweetpotato, those who did more often recalled the colour rather than a specific variety, with Orange / Gold / Yellow being the most recalled colour.
- Taste, adding to variety and ease of preparation are the strongest triggers to purchase, while already consuming enough for their needs and wanting variety in vegetables are the two biggest barriers.
- Consumers expect sweetpotato to remain fresh for nearly two weeks. Expectations of freshness are largely met.

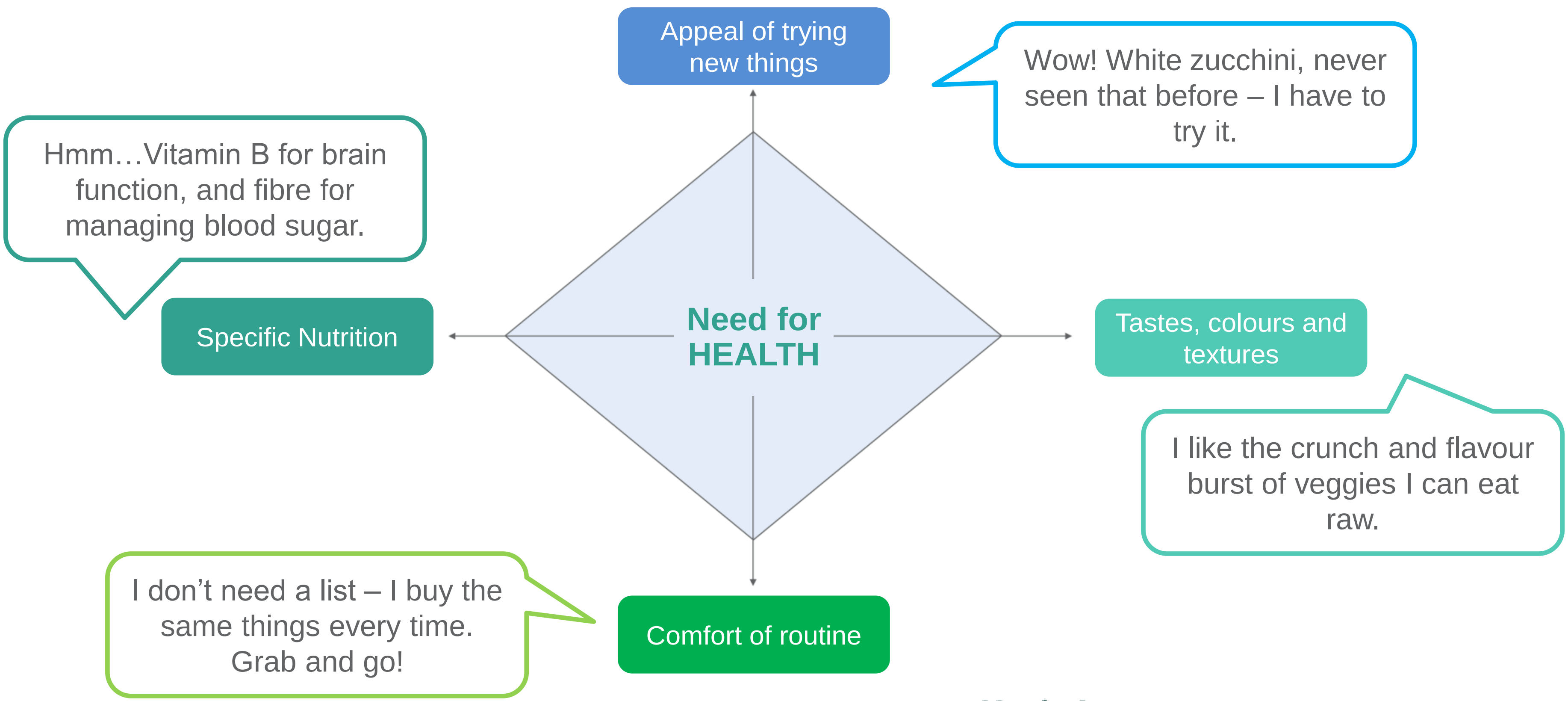
Capsicum:

- Consistent with previous waves, capsicums have strong category health figures for importance, satisfaction, endorsement and interest in new varieties.
- Purchase and consumption frequency of capsicum both declined, to 9 consumption occasions per month. Purchase is mainly from Coles, Woolworths and specialist retailers.
- Consumers on average are purchasing 600g of capsicums. Recalled last spend is $3.60, which is perceived as fair value for money.
- Price tracking for May 2015 showed the national average as $5.65 per kilogram for green capsicums.
- Approximately one half of respondents were able to recall a type of capsicum. Colour is the main trigger to recall.
- Adding colour to a meal and using as an ingredient in dishes remain the key influences to purchase. Barriers to purchase included price and consuming enough for their needs.
- Consumers expect capsicum to remain fresh for over 8 days once purchased, expectations are in line with previous waves and generally met.

Wave 24: 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:

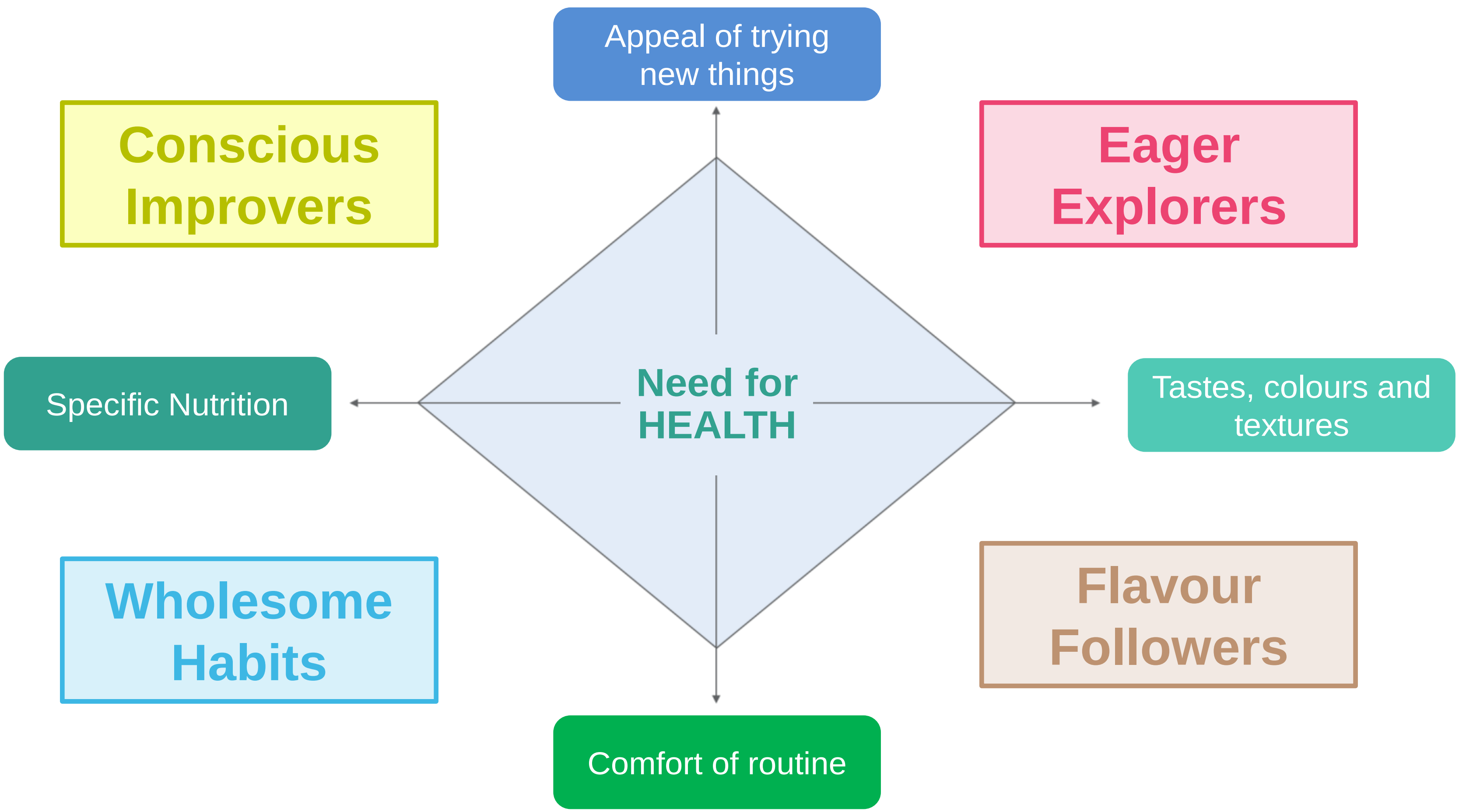
Willing to spend the time and money in-store to buy the best nutritional ingredients. Looking for new ways to offer the best of nutrition to their families, understand the importance of freshness.

Be more relevant by:

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

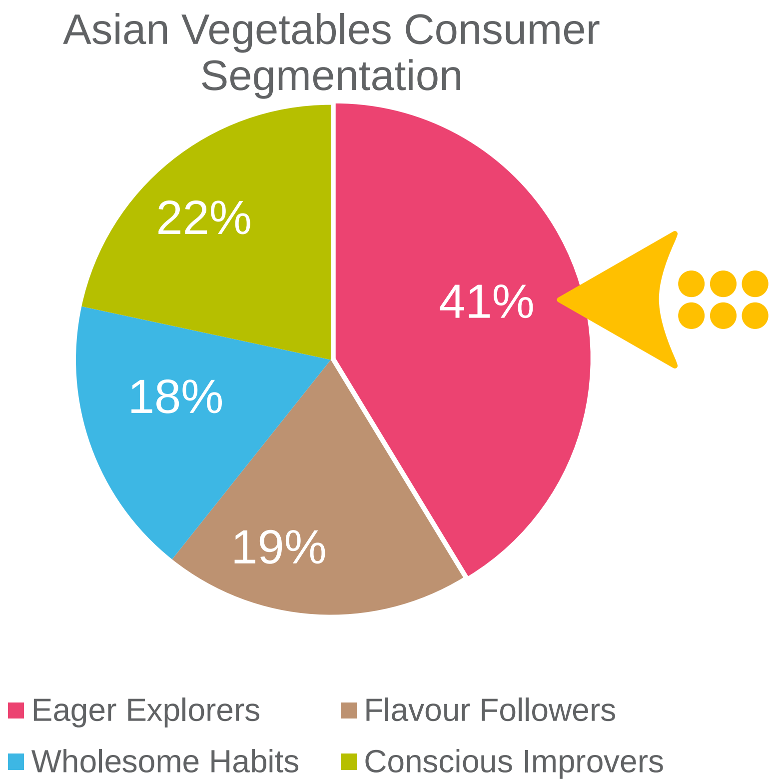
The segment names reflect behaviours and core needs

The segments are named to reflect behaviours and core needs



Asian Vegetables Grower Action Plan

Target: Eager Explorers Consumers



Your vegetable appeals to the **Eager Explorers** consumers. These consumers are motivated by taste, colour and texture of Asian vegetables.

Be more relevant by:

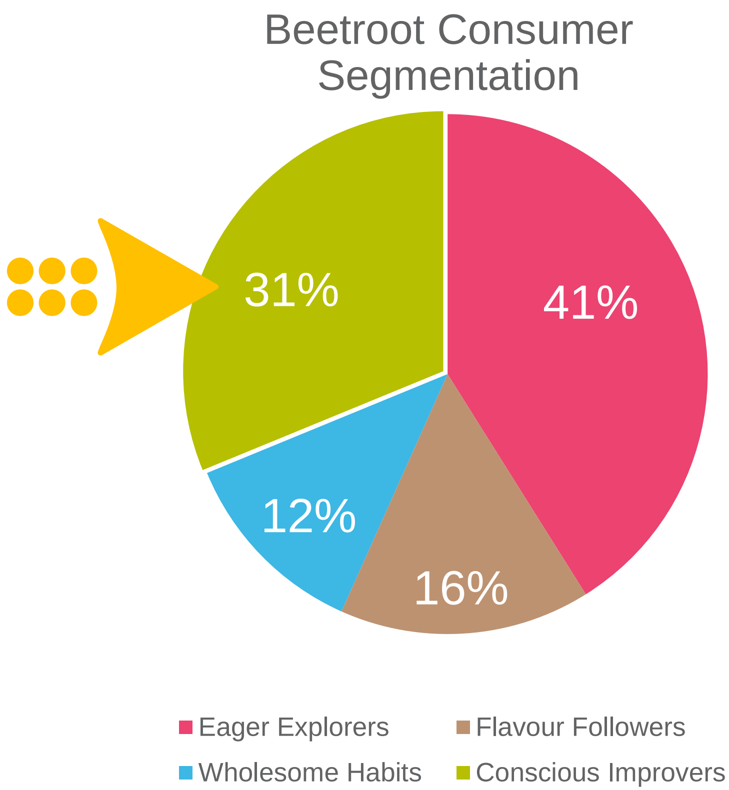
Consumers are unsure of the ‘rules’ on how to use multiple varieties of Asian vegetables. Include simple messages for how to incorporate them in cooking. Tell them what each vegetable will bring to the dish and how is it best incorporated. Educate how to get the best out of each varietal.

Promote uses and cooking styles beyond stir fries and Asian favoured meals, such as soups, salads and coleslaw.

**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.*

Beetroot 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 beetroot and are influenced by their nutritional benefits.

Be more relevant by:

Recently referred to as the new ‘superfood’, continue awareness of the vegetable by calling out specific health benefits on packaging where possible. Use claims such as high in folic acid, fibre and manganese.

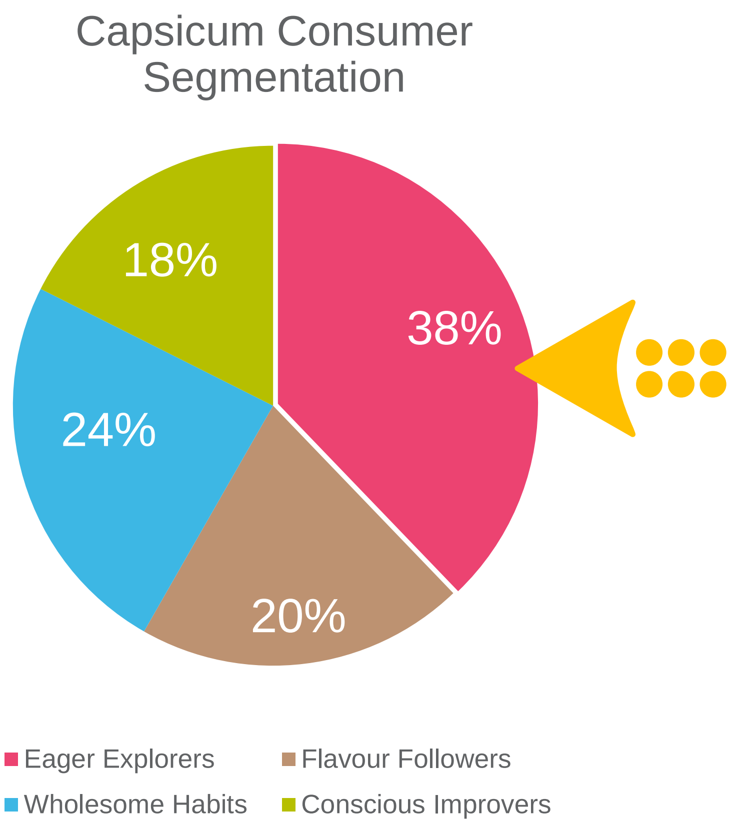
These consumers are open to new recipe ideas. Promote the use of the whole vegetable, including the leaves, (these are a rich source of calcium and iron) with recipe cards in-store.

There is scope to include beetroot in multiple pre-prepared and processed products, like the trends being seen in the UK. Companies are including beetroot in chips, juices, salads and soups. Make sure health benefits are clearly labelled on pack.

**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.*

Capsicum Grower Action Plan

Target: Eager Explorer Consumers



Your vegetable appeals to the **Eager Explorer** consumers. These consumers are motivated by taste, colour and texture of capsicum. They are looking for new recipes and cooking styles.

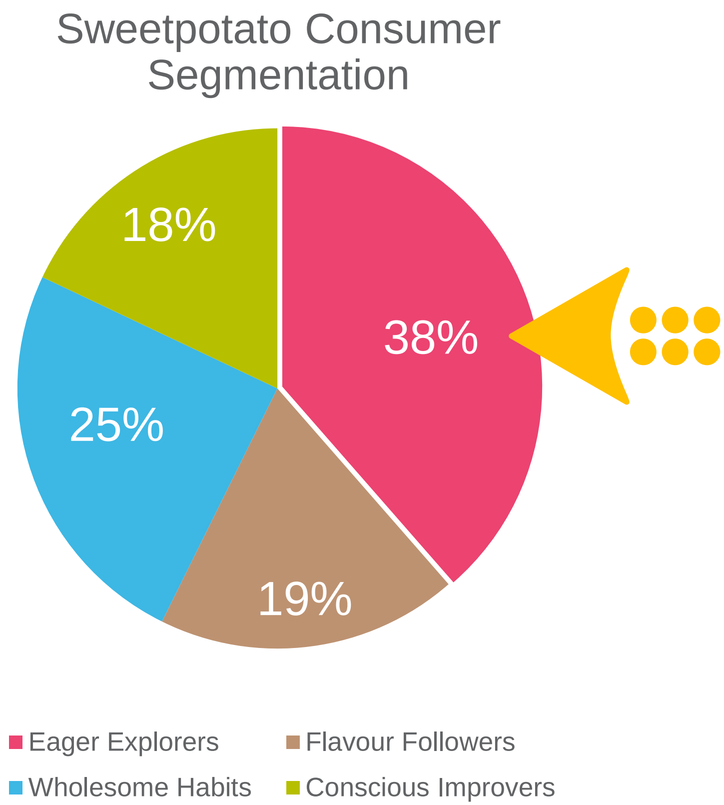
Be more relevant by:

These consumers are more open to experimentation, attract them with in-store displays that are colourful and promote freshness and quality. Provide taste demonstrations in-store to encourage trial and set flavour expectations before the consumer cooks with the capsicum.

Promote the alternative types of capsicum to these consumers, such as red, green, orange and purple. Identify the flavour differences of these types of capsicums- such as the level of sweetness and crunchy texture. Also highlight suitability for cooking cuisines, such as Chinese and Italian. This could be communicated on pack or in-store with the addition of recipe cards.

**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.*

Sweetpotato 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 sweetpotato.

Be more relevant by:
These consumers are not afraid to try new things, provide in-store recipe cards that highlight sweetpotato as a versatile vegetable for exotic cuisines, such as Indian, Japanese and Thai.

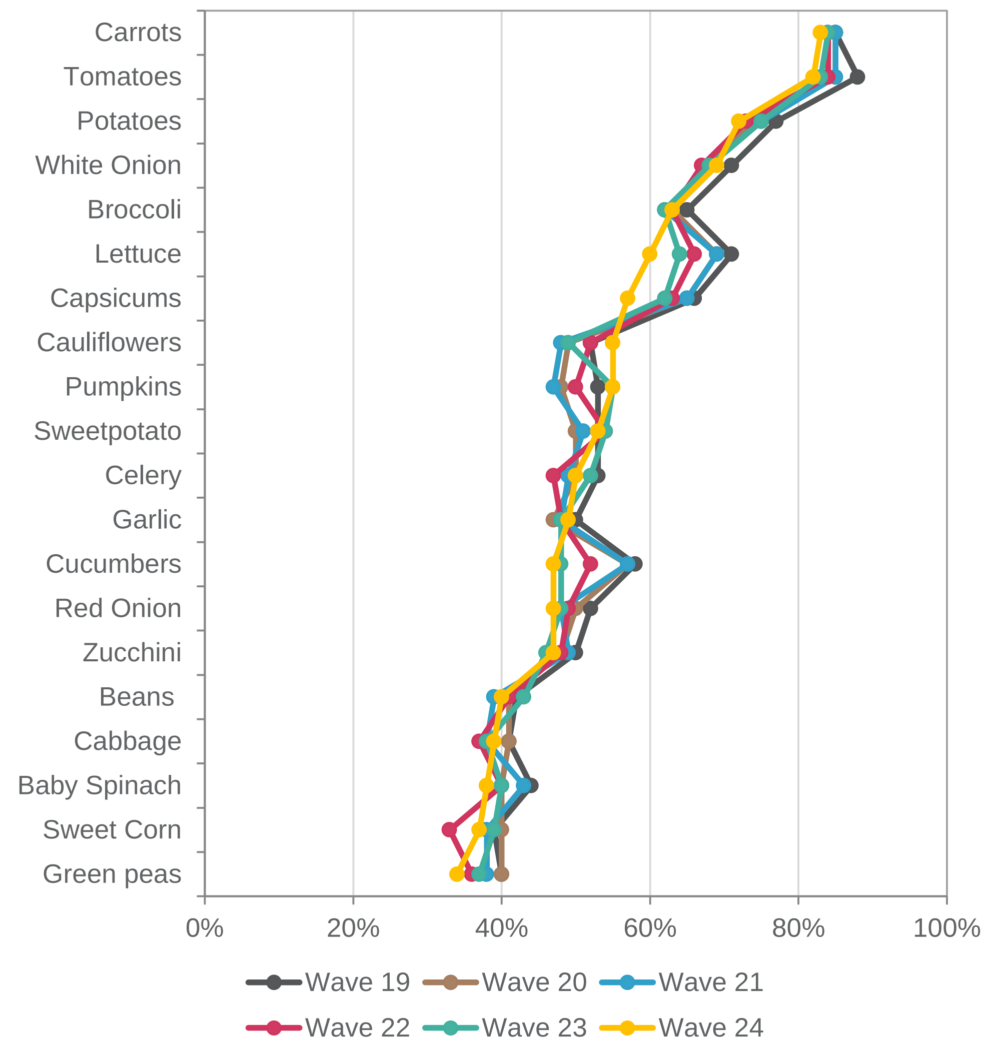
Provide meal occasions outside of dinner, including jacket/baked sweetpotatoes for lunch, soup ideas and quick snacks on the go.

**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 24: Overall Vegetable Tracking

The top vegetables purchased last month were carrots, tomatoes and potatoes.

This month sees a decline in purchase of lettuce and capsicums. Overall however, purchase behaviour is on trend with past months.



Sample Wave 20 N= 1653
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**?

Endorsement remains strong for all commodities this month, with all vegetables scoring above the Harvest mean. Consumers are likely recommend these vegetables to family and friends.

Consumers are intending to purchase more Asian Vegetables, Beetroot and Sweetpotato in the future. Purchase of Capsicums looks to remain consistent.

	Asian Vegetables	Beetroot	Sweetpotato	Capsicum	Harvest Total Mean
Importance	7.4	6.3	6.0	7.1	6.3
Satisfaction	6.6	6.3	6.5	7.0	6.6
Endorsement	7.5	7.4	7.4	7.1	6.8
Interest (New Types)	7.4	6.8	6.3	6.4	6.1
Future Purchase					
More	26%	29%	19%	10%	14%
Same	73%	69%	80%	89%	84%
Less	1%	2%	1%	2%	2%

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

Asian Vegetables.

Purchase and consumption of Asian vegetables remains high. On average, consumers are eating Asian vegetables twice a week.

Coles remains the key location for purchase. However, there has been a consistent increase in purchase from markets.

Average Purchase **5.0** times per month

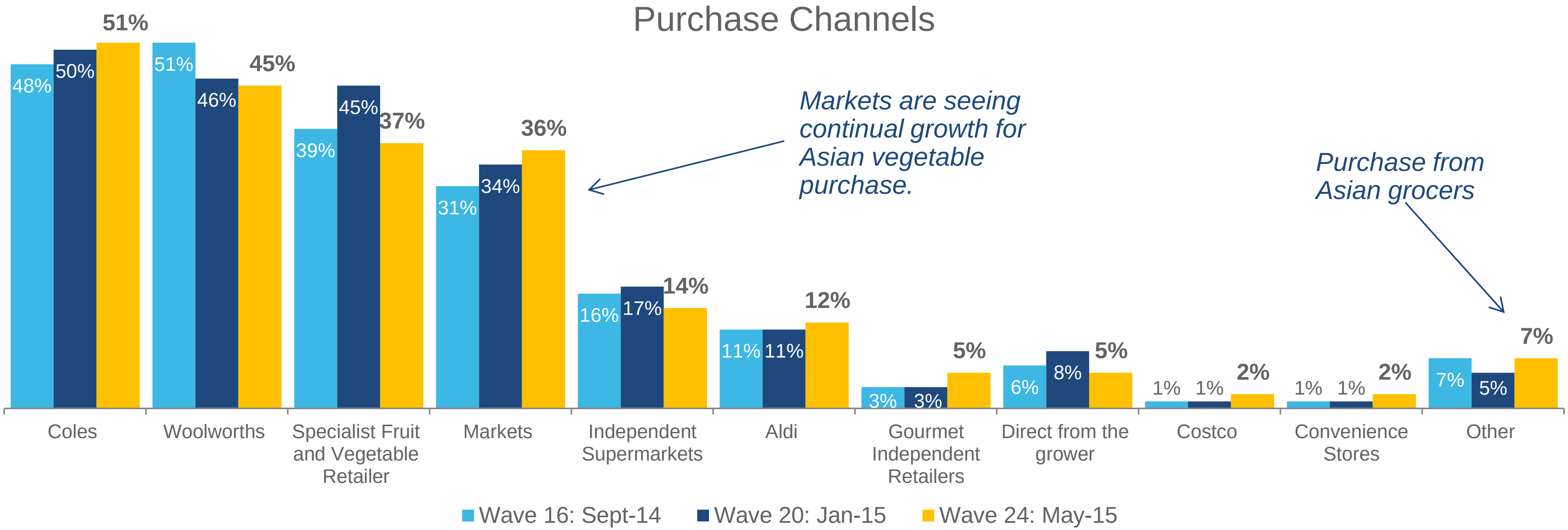
▼ 4.5 times, Wave 16

▼ 4.9 times, Wave 20

Average Consumption **8.8** times per month

▼ 8.7 times, Wave 16

▲ 9.0 times, Wave 20



Q1. On average, how often do you purchase <commodity>?
Q2. On average, how often do you consume <commodity>?
Q5. From which of the following channels do you typically purchase <commodity>?
Sample Wave 16, N=303, Wave 20, N=317, Wave 24, N=311

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

Average spend and price sensitivity and perceptions remain relatively stable.

Average weight of purchase

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

▲ 1.1kg, Wave 16
— 1.0kg, Wave 20

Recalled last spend

The average recalled last spend in May 2015 is **$5.90**. This has been stable across previous waves.

▲ $6.00, Wave 16
▲ $6.00, Wave 20

Value for money

On average, consumers perceive Asian Vegetables to be good value for money **(6.7/10),** in line with previous months.

— 6.7/10, Wave 16
▼ 6.6/10, Wave 20

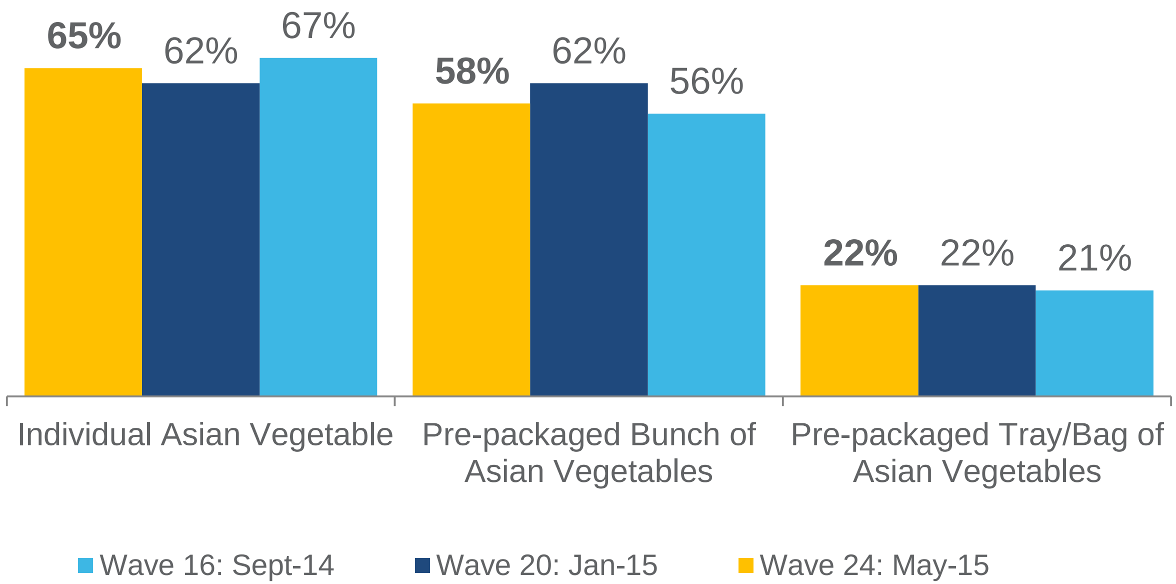
Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typical purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 16, N=303, Wave 20, N=317, Wave 24, N=311

Horticulture Innovation Australia

colmar brunton.

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

Individual and pre-packed bunches of Asian vegetables remain the most popular formats purchased.

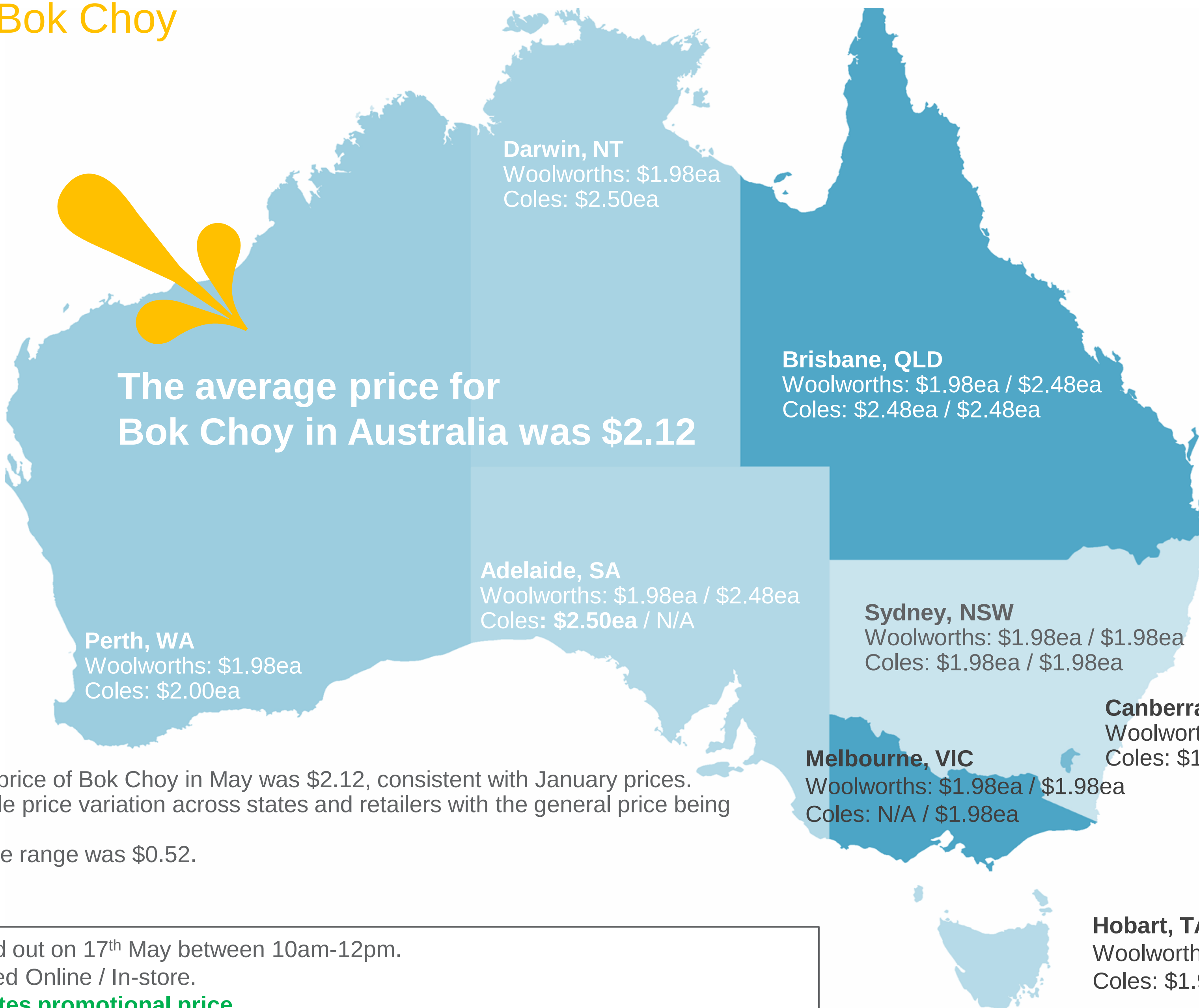


	Individual	Pre-packaged Bunch	Pre-packaged Tray
Wave 16	2.6	2.1	2.0
Wave 20	2.4	2.0	1.8
Wave 24	2.6	2.0	1.8

Q3a. How much <commodity> does this typically equate to?
Sample Wave 16, N=303, Wave 20, N=317, Wave 24, N=311

Online and In-store Commodity Prices

Baby Bok Choy

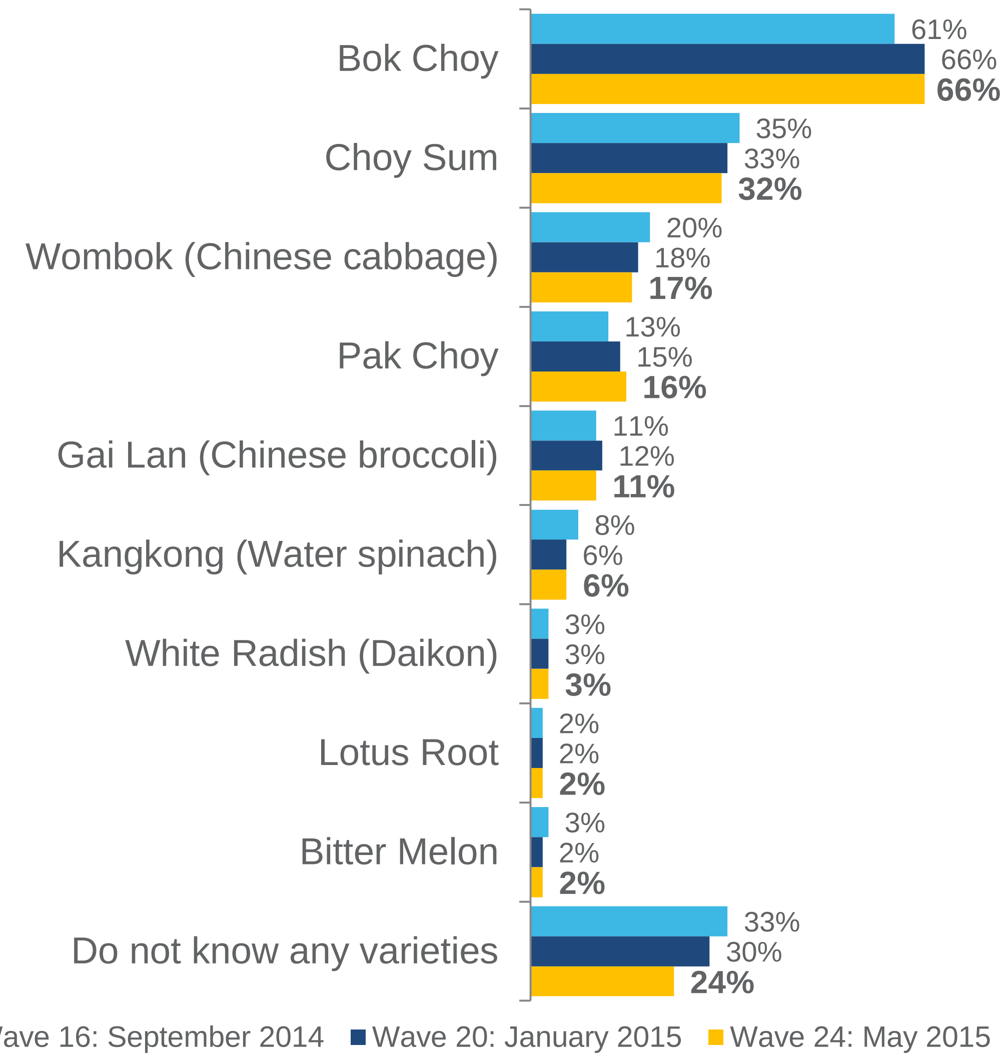


- The average price of Bok Choy in May was $2.12, consistent with January prices.
- There was little price variation across states and retailers with the general price being $1.98 each.
- The retail price range was $0.52.

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

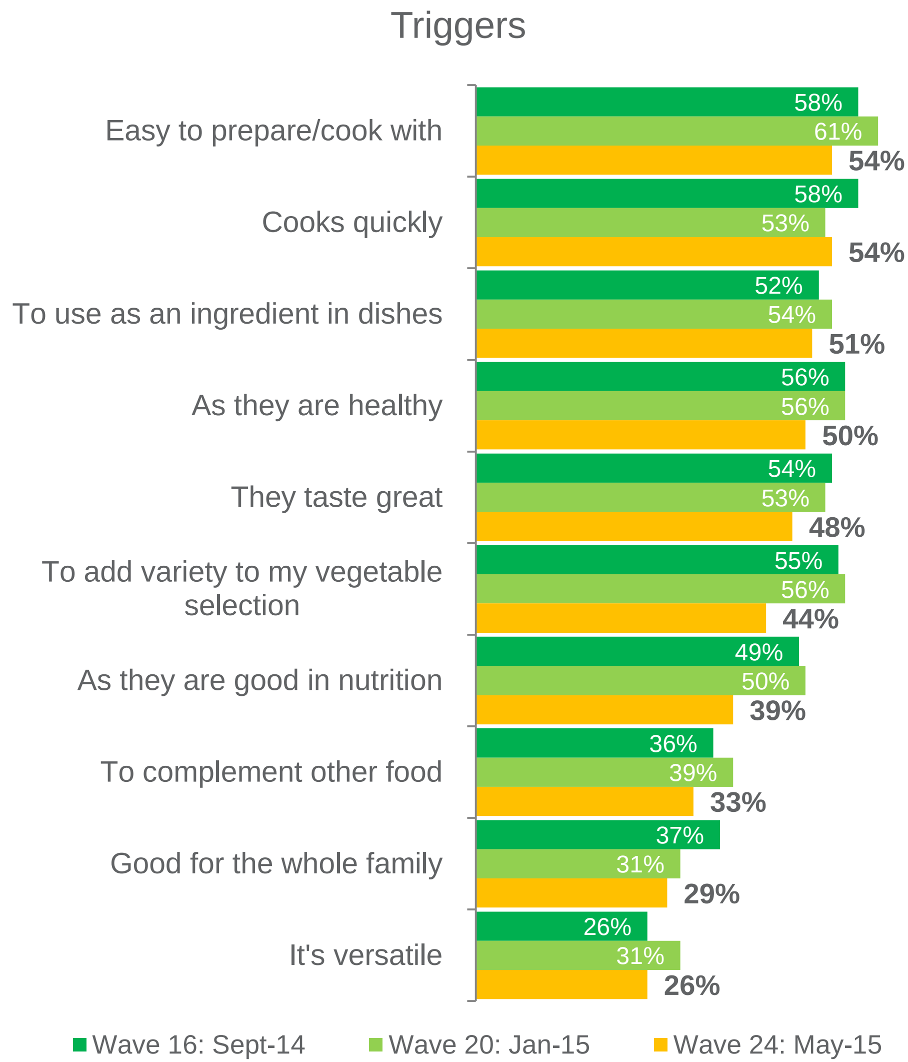
Awareness of Asian vegetable varieties has consistently increased over the last three waves.

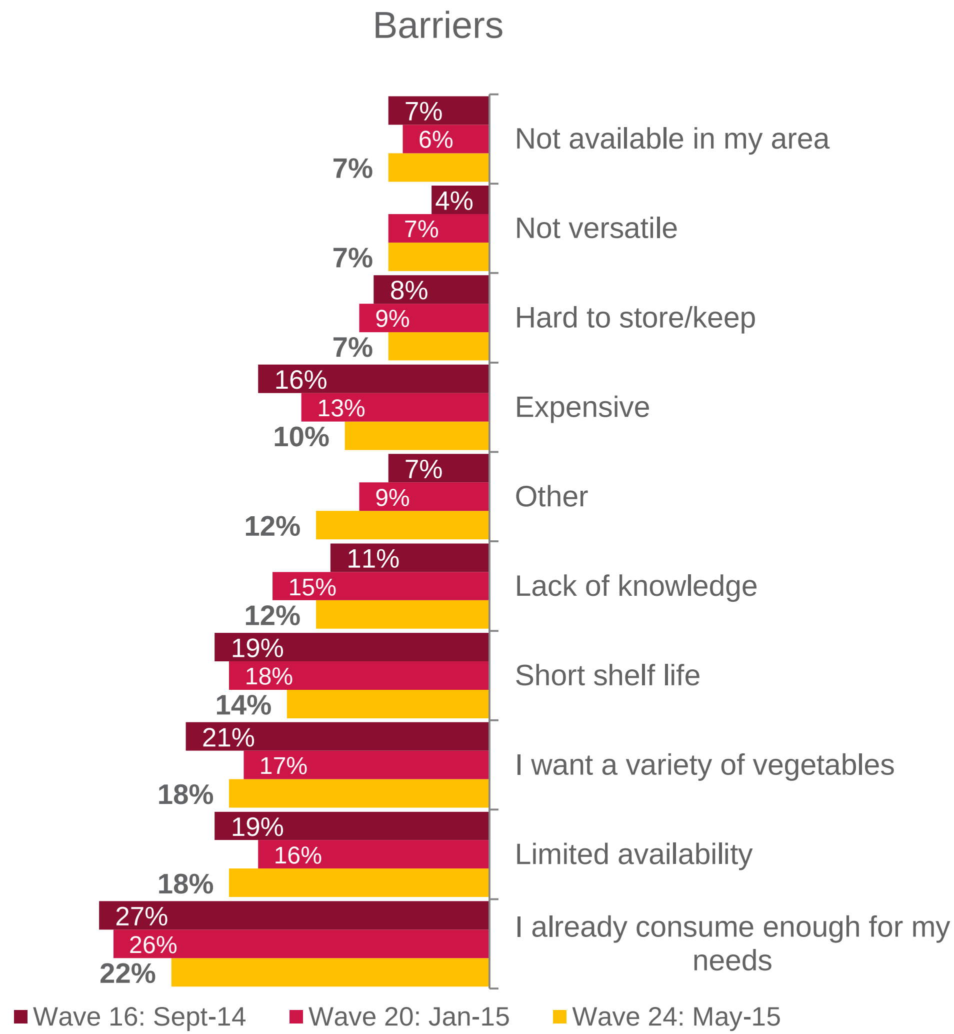
Bok choy and choy sum have the greatest recall amongst consumers.



Q6a. What varieties/types of <commodity> are you aware of? (unprompted)
Sample Wave 16, N=303, Wave 20, N=317, Wave 24, N=311

Ease of preparation and short cooking times are the main drivers of purchase. Past months have seen a decline in consuming enough for my needs, however it still remains the key barrier to purchase.





Horticulture Innovation Australia colmar brunton.

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 16, N=303, Wave 20, N=317, Wave 24, N=311

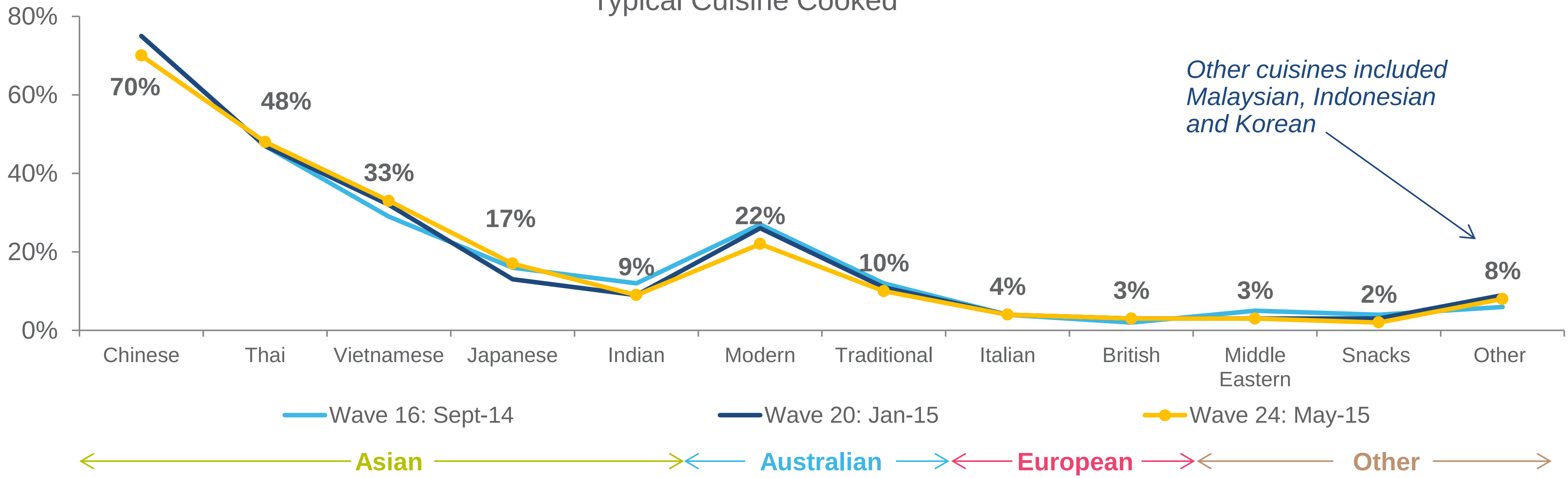
Asian vegetables are generally eaten at dinner time, during both the weekday and weekends.

Consumers are cooking Chinese, Thai and Vietnamese cuisines.

Top 5 Consumption Occasions

	Wave 24	Wave 20	Wave 16
Weekday Dinner	**58%**	56%	57%
Quick Meals	**37%**	44%	38%
Weekend Dinner	**36%**	37%	37%
Family meals	**32%**	34%	31%
Everyday	**30%**	34%	38%

Typical Cuisine Cooked



Sample Wave 16, N=303, Wave 20, N=317, Wave 24, N=311
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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colmar brunton.

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

Cooking preferences have remained consistent between waves. Consumers are typically stir frying Asian vegetables. There has been an increase in shallow frying across waves.

Asian vegetables are cooked with carrots, capsicums and onion.

Accompanying Vegetables

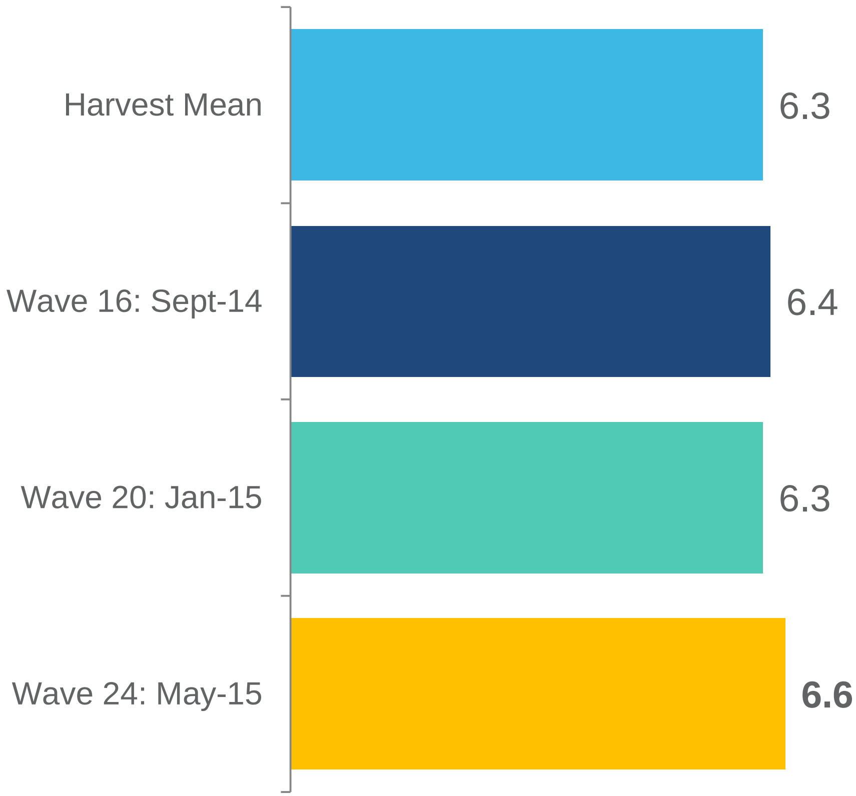
Carrot	51% ▼
Capsicum	43% ▼
Onion	43% ▲
Broccoli	36% ▲
Garlic	36% ▲

Top Cooking Styles

	Wave 16	Wave 20	Wave 24
Stir frying	79%	80%	78%
Steaming	41%	44%	42%
Soup	23%	23%	24%
Sautéing	24%	16%	22%
Boiling	19%	18%	16%
Shallow Frying	9%	12%	14%
Blanche	13%	16%	13%
Raw	12%	13%	8%
Microwave	11%	9%	7%
Roasting	3%	3%	5%

Q9. How do you typically cook <commodity>?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
Sample Wave 16, N=303, Wave 20, N=317, Wave 24, N=311

Asian vegetable provenance is important to consumers, sitting above the Harvest mean and past waves.



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

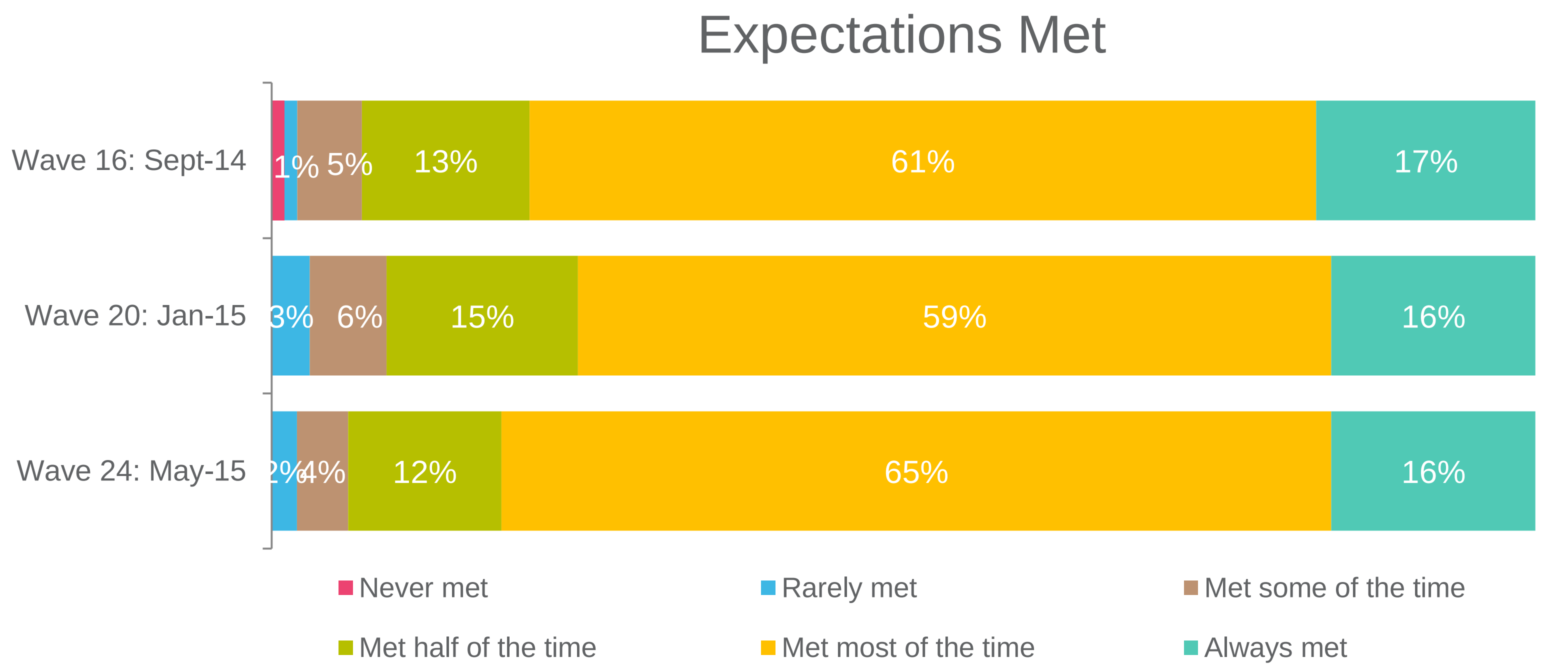
Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 16, N=303, Wave 20, N=317, Wave 24, N=311

Once purchased, consumers expect Asian vegetables to remain fresh for up to five days.

Expectations of freshness are generally met most of the time.

Expected to stay fresh for **5.6** days

▲ 5.9 days, Wave 16
▲ 5.7 days, Wave 20



Q12. How long do you expect <commodity> to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy <commodity> ?
Sample Wave 16, N=303, Wave 20, N=317, Wave 24, N=311

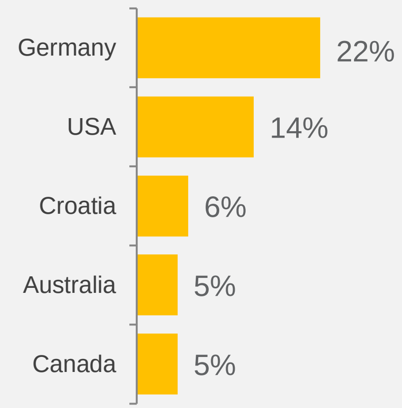
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Trends: Asian Vegetables

Asian Vegetables Global NPDs
March– May 2015

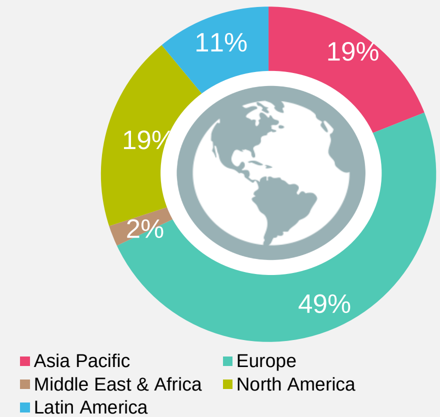
There were 63 launches in the last three months that contained Asian Vegetables as an ingredient. Products are primarily launched in Europe, Asia Pacific and North American regions. The main categories for launches are meals, side dishes and fruit and vegetables.

Country

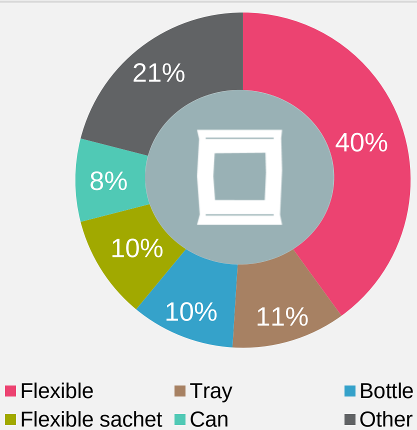


63 Global Launches

Region



Top Pack Formats



Categories

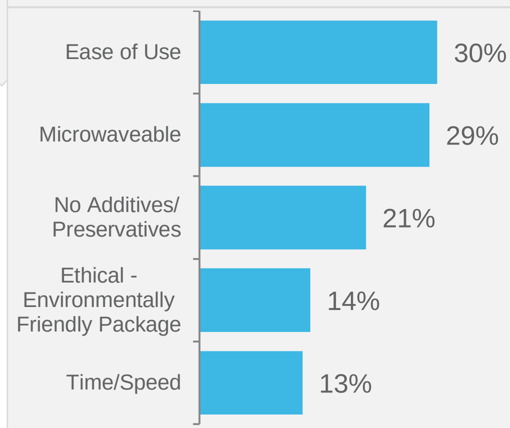
Meals 33%

Sauces & Seasonings 25%

Snacks 18%

Fruit & Vegetables 16%

Top Claims



Asian Vegetables Product Launches:
Last 3 Months (March – May 2015)
Summary

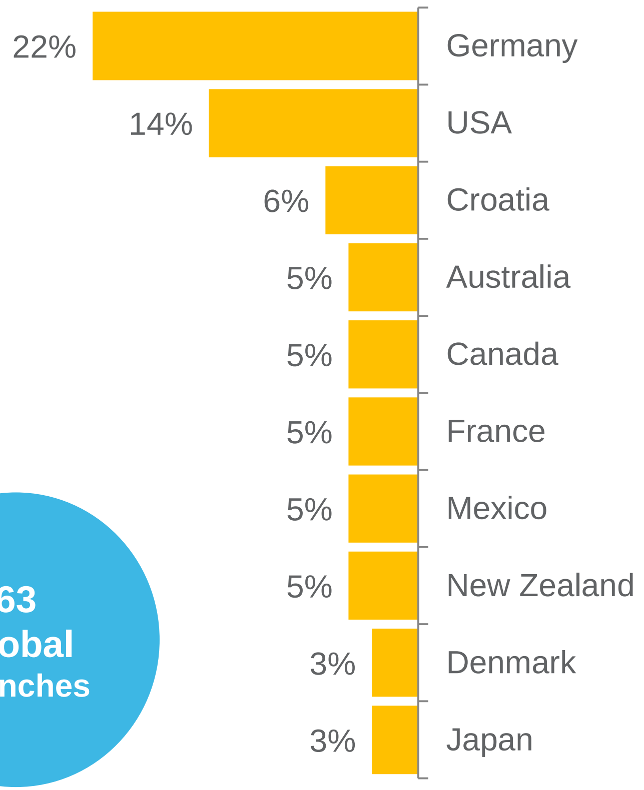
- There were 63 products launched over the last three months that contained Asian Vegetables as an ingredient.
- There were no products launched in Australia this wave.
- Europe (49%) and North America (19%) were the main regions for launches.
- Flexible formats remained the most common type of packaging (40%),
- The top category launches were meals (33%), sauces and seasonings (25%) and fruit and snacks (18%).
- Popular claims used were around convenience, including ease of use (30%), microwavable (29%), consistent with previous trends. No additives/preservatives was also commonly used (21%).
- The most innovative Asian Vegetable product was the H-E-B Chicken Egg Rolls, launched in Mexico (examples can be found in the following pages).

Source: Mintel (2015)

Asian Vegetables Country & Category Launches

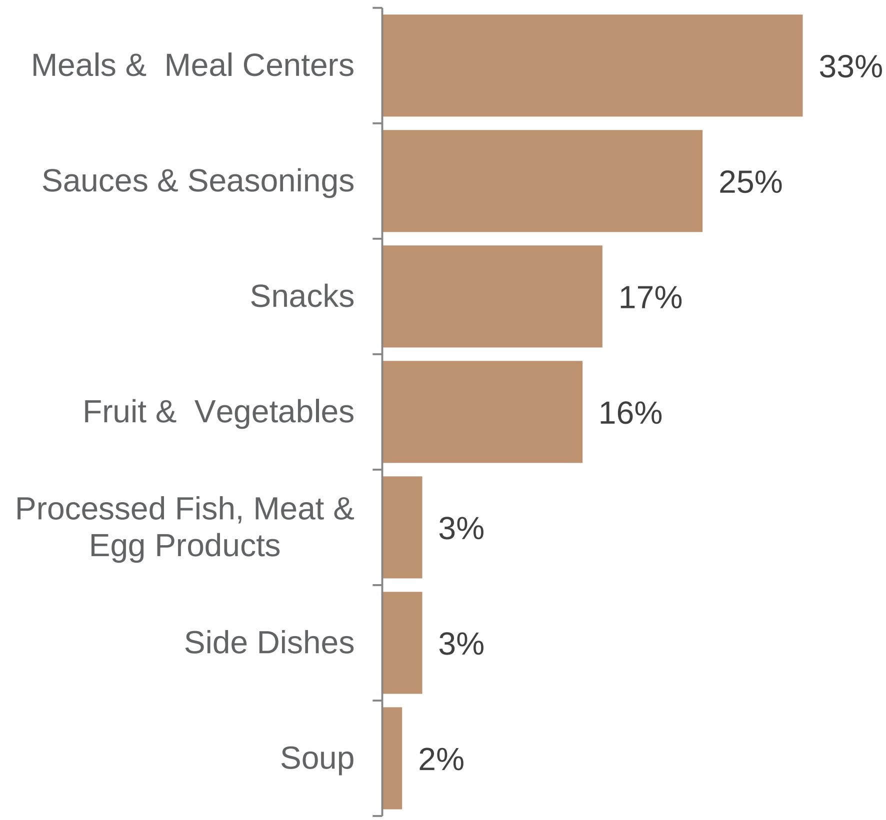
Germany and USA are key countries for launches. The main category for Asian Vegetable products are meals.

Top Launch Countries



63 Global Launches

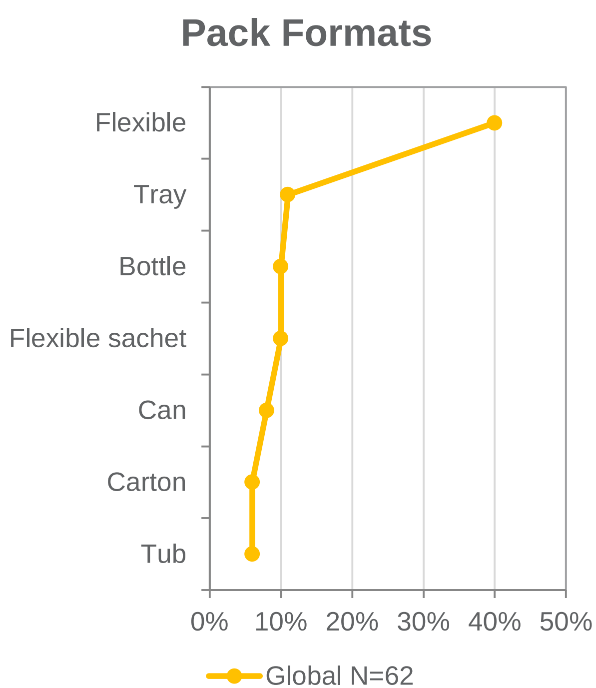
Top Launch Categories

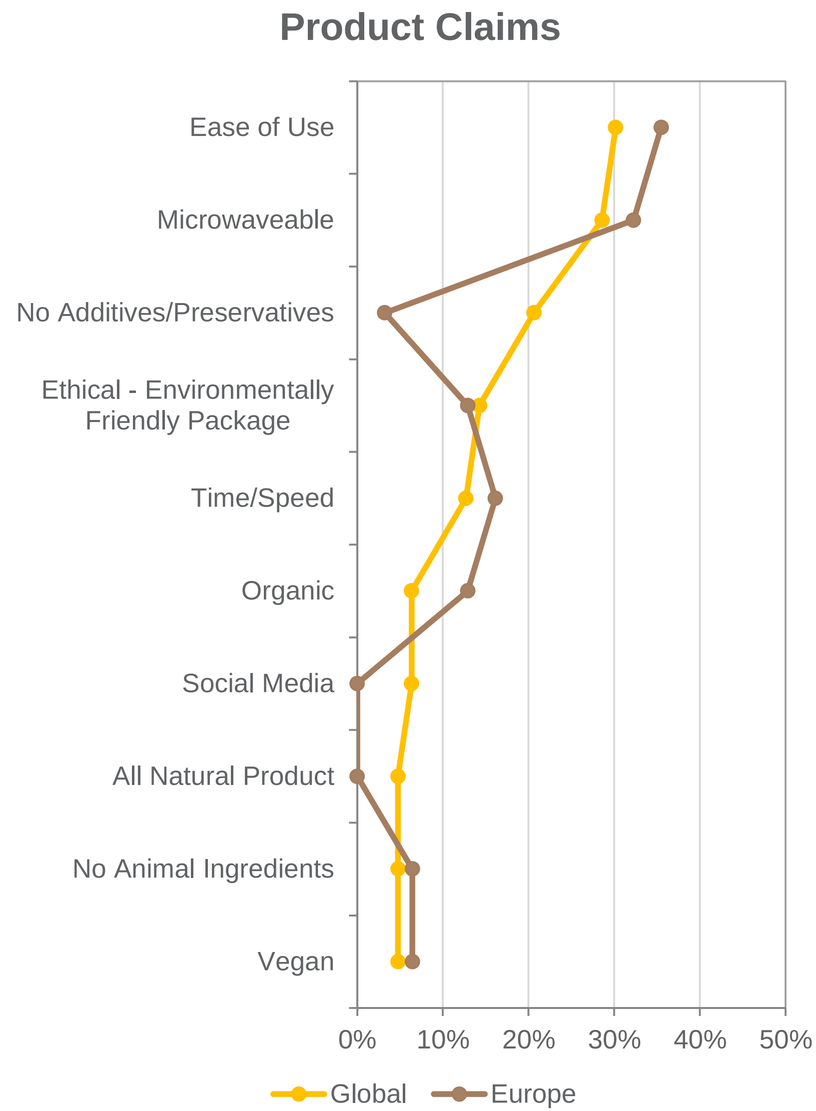


Key Claims & Pack Formats

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

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





Innovative Asian Vegetables Launches:
L3M (March– May 2015)

Kahiki StirFresh General Tso's Chicken (USA)

Kahiki StirFresh General Tso's Chicken comprises tempura white meat chicken with broccoli, carrots and red bell peppers with a zesty Asian-style sauce. This USDA certified product is made with all natural ingredients, and contains no artificial flavors, preservatives or MSG.

Claims:
Ease of Use, No Additives/Preservatives, All Natural Product, Social Media, Microwaveable

Woolworths Food Asian Style Beef and Slaw Wrap (South Africa)

Woolworths Food Asian Style Beef and Slaw Wrap is now available. The product retails in a pack containing two units.

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

H-E-B Chicken Egg Rolls (Mexico)

H-E-B Carne de Pollo con Verduras con Envoltura Crujiente (Chicken Egg Rolls) comprise crispy Asian style wrappers filled with chicken and a blend of vegetables. The microwaveable product has been inspected for wholesomeness by the USDA and retails in a 340g pack containing four units.

Claims:
Microwaveable

Ernte Krone Asian Style Vegetable Pan with Refined Sauce (Germany)

Ernte Krone Pfannengemüse Asiatische mit Raffinierter Sauce (Asian Style Vegetable Pan with Refined Sauce) is suitable for vegetarians without eggs. This microwaveable product retails in a 750g pack.

Claims:
Vegan, Vegetarian, No Animal Ingredients, Microwaveable

Source: Mintel (2015)

Innovative Asian Vegetables Launches:
L3M (March– May 2015)

Vitasia China Chicken Spring Rolls (Croatia)

Vitasia China Rolice s Povrcem i Pilecim Mesom (Chicken Spring Rolls) are described as Asian style batter spring rolls snacks with vegetable and meat filling. This product retails in a 400g pack containing four 100g units.

Claims:
N/A

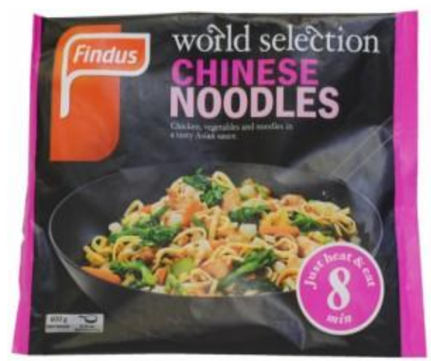
Giant Eagle Shrimp Stir-Fry (USA)

Giant Eagle Shrimp Stir-Fry has been repackaged with a new look. The product comprises tender shrimp and oriental-style vegetables in authentic Asian spices that can be prepared in 10 minutes. It contains no MSG and retails in a 24.2-oz. pack.

Claims:
No Additives/Preservatives

Findus World Selection Chinese Noodles (Norway)

Findus World Selection Chinese Noodles have been relaunched under a new brand, which was previously known as Findus Oppdag Verden. This meal comprises chicken, vegetables and noodles in a Asian sauce. It just requires to be heated in eight minutes and retails in a 600g pack.



Claims:
Ease of Use

Vitasia Thai Asian Mix Thai Curry (Croatia)

Vitasia Thai Dodatak Za Jelo U Woku S Curry-em Na Tajlandski Nacin (Asian Mix Thai Curry) just needs the addition of diced meat and sesame oil. The product retails in a 40g pack.

Claims:
Ease of Use

Source: Mintel (2015)

Innovative Asian Vegetables Launches:

L3M (March– May 2015)

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Perfect Fit Meals Asian Style Pork with Rice Noodles & Vegetables (USA)

Comprises chopped pork tenderloin marinated in a tangy Asian BBQ sauce with sugar snap peas, mushrooms, carrots, and pickled cucumbers served with rice noodles. This heat and eat product is hand crafted, portion controlled and dietitian designed. The USDA inspected product contains quality lean proteins and satisfying whole grains, has been made with healthy cooking oils, and can be heated in the microwave.

Claims:
High Satiety, Ease of Use, Wholegrain, Slimming, Microwaveable

Great Value Asian Style Mixed Vegetables (Canada)

Great Value Asian Style Mixed Vegetables have been repackaged. This economy product retails in a 500g resealable pack.

Claims:
Convenient Packaging, Economy

Anna's Best Asia Nasi Goreng with Chicken (Switzerland)

Anna's Best Asia Asiatisches Reisgericht mit Gebratenem Poluetfleisch und Gemüse (Nasi Goreng with Chicken) has been reformulated and now features new quality with meat from Switzerland. It is described as an Asian rice dish with fried chicken and vegetables. This microwaveable product retails in a 370g pack bearing the FSC mix logo.

Claims:
Ethical - Environmentally Friendly Package, Microwaveable

Nonghyup Boiled Dumplings (South Korea)

Nonghyup Boiled Dumplings are made with Korean wheat. This product is wrapped with carefully kneaded chewy thin dumpling layer and filled with extra pork and vegetables. It is free from MSG, synthetic colourings, synthetic flavourings, d-sorbitol solution and alum, and said to be safe and good for health.

Claims:
No Additives/Preservatives

Source: Mintel (2015)

Beetroot.

Consumption of beetroot was lower this wave, on average being eaten seven to eight times per month.

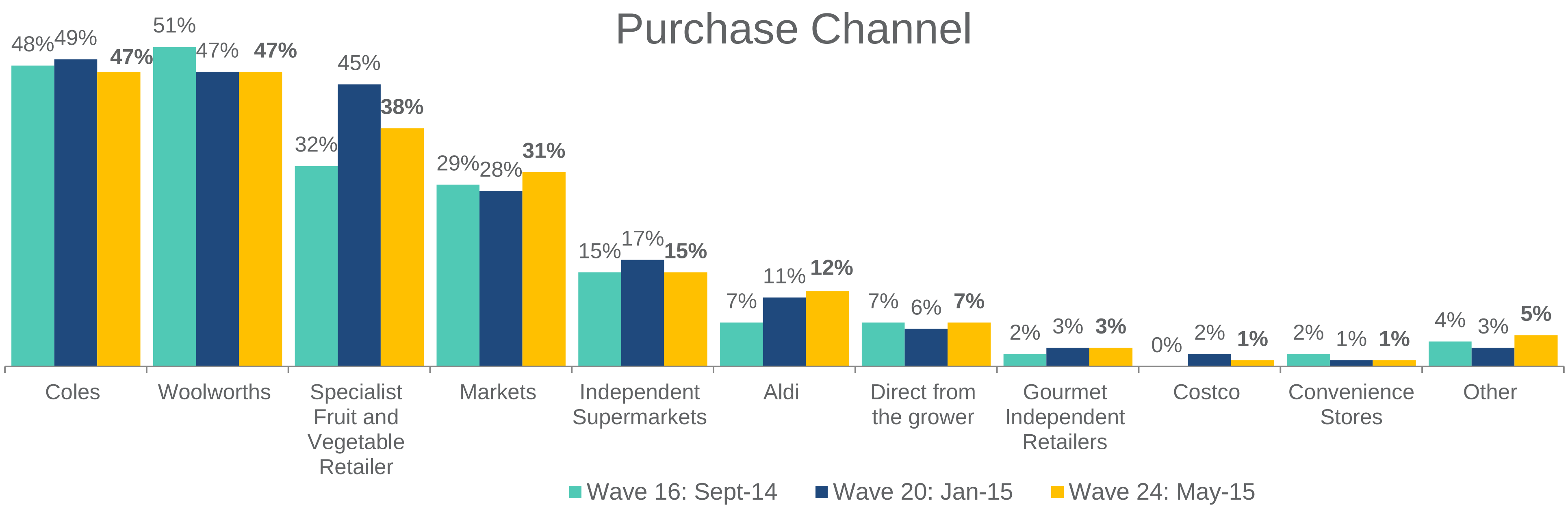
There is a decrease in purchase from specialist retailers, whilst there has been a slight increase in purchase from markets.

Average Purchase **3.3** times per month

▼ 2.9 times, Wave 16
▼ 3.2 times, Wave 20

Average Consumption **7.6** times per month

▼ 7.2 times, Wave 16
▲ 8.1 times, Wave 20



Q1. On average, how often do you purchase <commodity>?
Q2. On average, how often do you consume <commodity>?
Q5. From which of the following channels do you typically purchase <commodity>?
Sample Wave 16 N=241, Wave 20 N=289, Wave 24 N=259

Horticulture Innovation Australia
colmar brunton.

There was an increased last spend and consistent weight of purchase, yet there has been a positive increase in value perceptions.

Average weight of purchase

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

▼ 0.9kg, Wave 16
— 1.0kg, Wave 20

Recalled last spend

The average recalled last spend is **$4.70** in May 2015.

— $4.70, Wave 16
▼ $4.30, Wave 20

Value for money

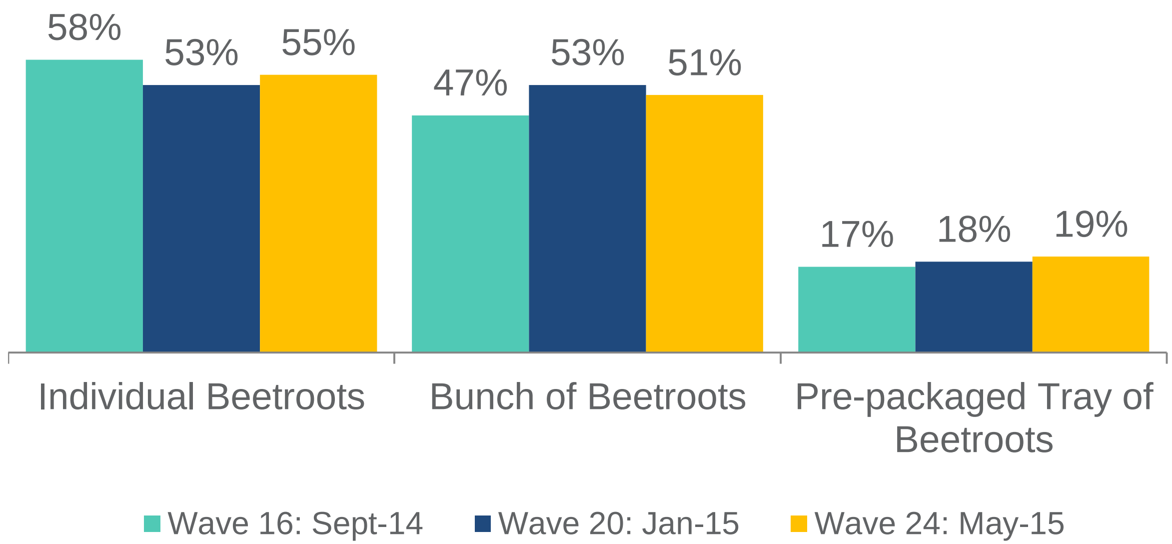
On average, consumers perceive Beetroot to be good value for money **(6.5/10).**

▼ 6.2/10, Wave 16
▼ 6.3/10, Wave 20

Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typical purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 16 N=241, Wave 20 N=289, Wave 24 N=259

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

This month saw an increase in the purchase of individual and pre-packaged beetroots. Both individual and bunched beetroot formats appeal most to consumers.

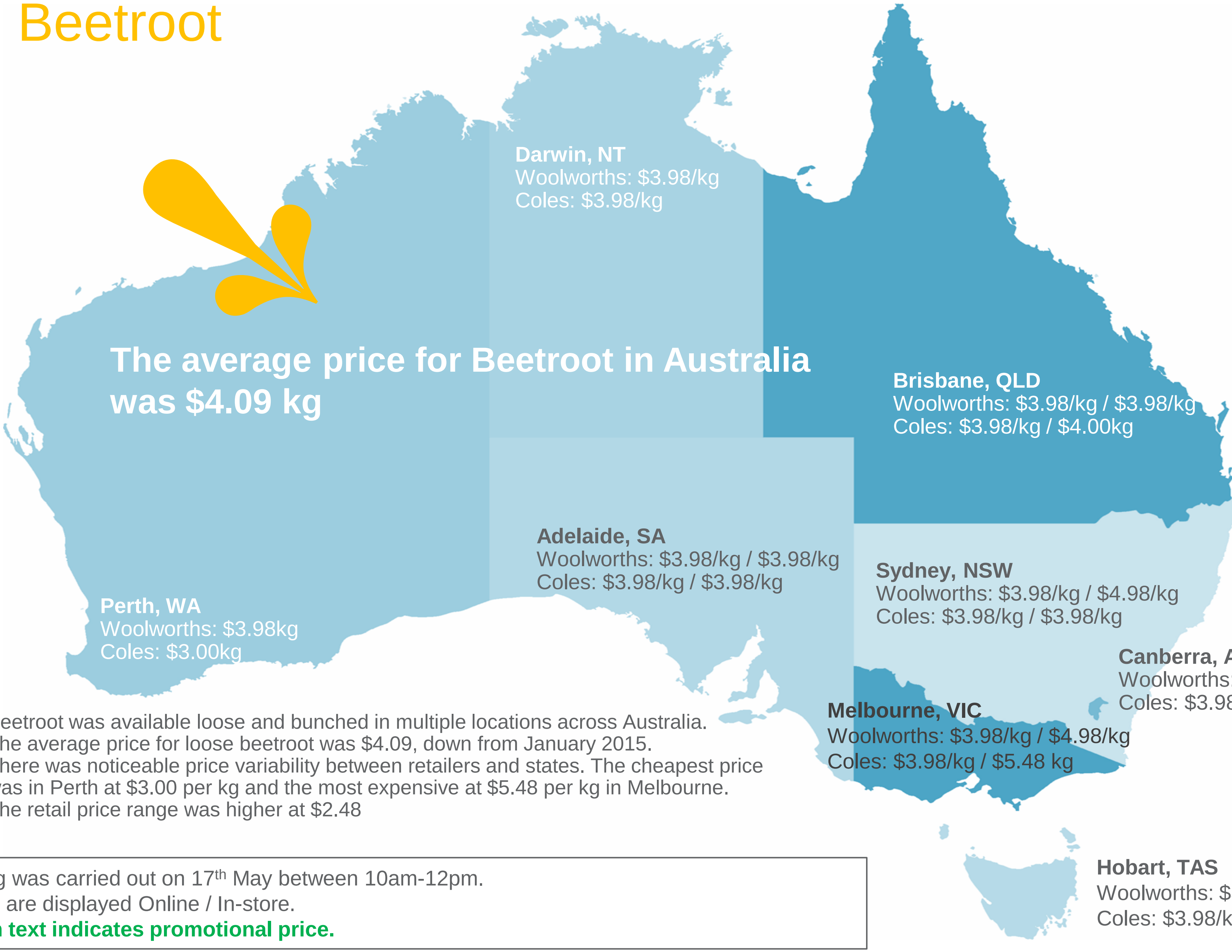


	Individual	Bunch	Pre-packaged
Wave 16	3.6	1.7	1.4
Wave 20	3.2	1.8	1.5
Wave 24	3.7	1.4	1.5

Q3a. How much <commodity> does this typically equate to?
Sample Wave 16 N=241, Wave 20 N=289, Wave 24 N=259

Online and In-store Commodity Prices

Beetroot

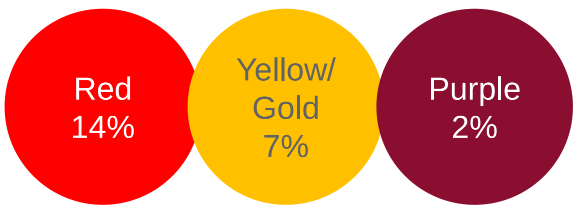


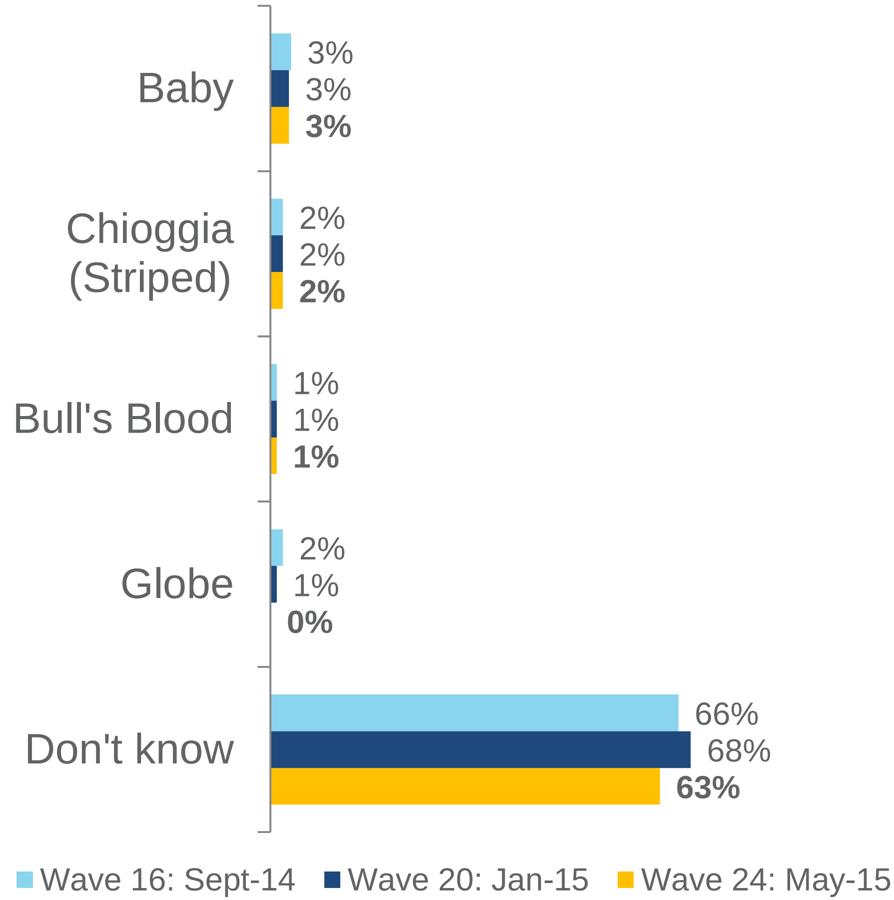
- Beetroot was available loose and bunched in multiple locations across Australia. The average price for loose beetroot was $4.09, down from January 2015.
- There was noticeable price variability between retailers and states. The cheapest price was in Perth at $3.00 per kg and the most expensive at $5.48 per kg in Melbourne.
- The retail price range was higher at $2.48

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

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

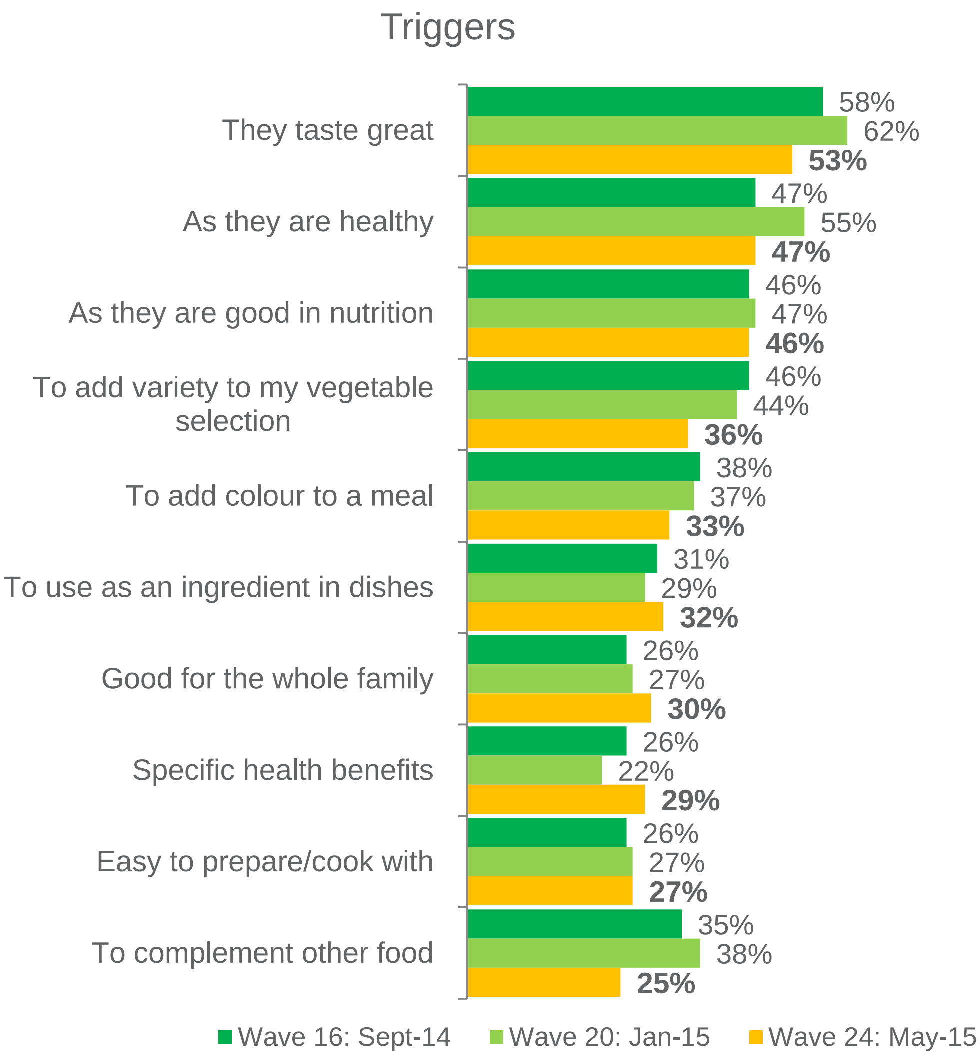
Colour, specifically red, remains the key influence on recall.

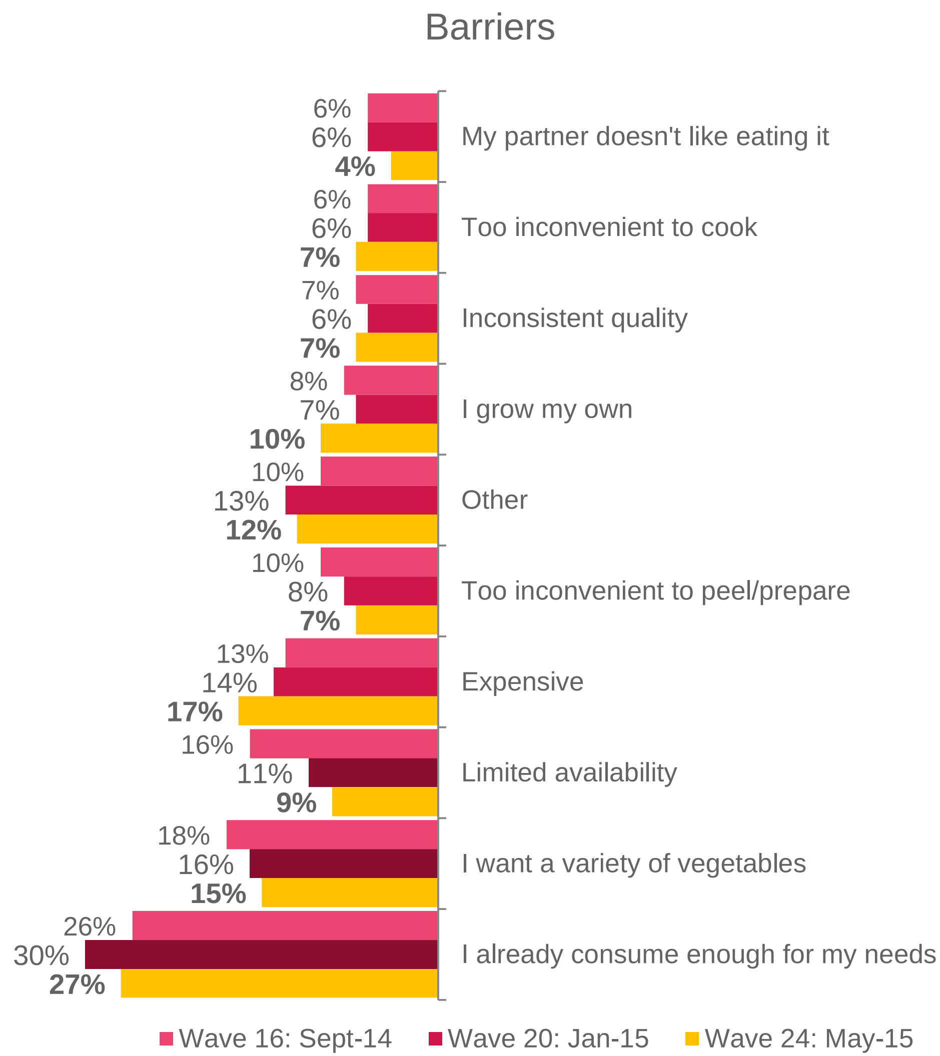




Q6a. What varieties/types of <commodity> are you aware of? (unprompted)
Sample Wave 16 N=241, Wave 20 N=289, Wave 24 N=259

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





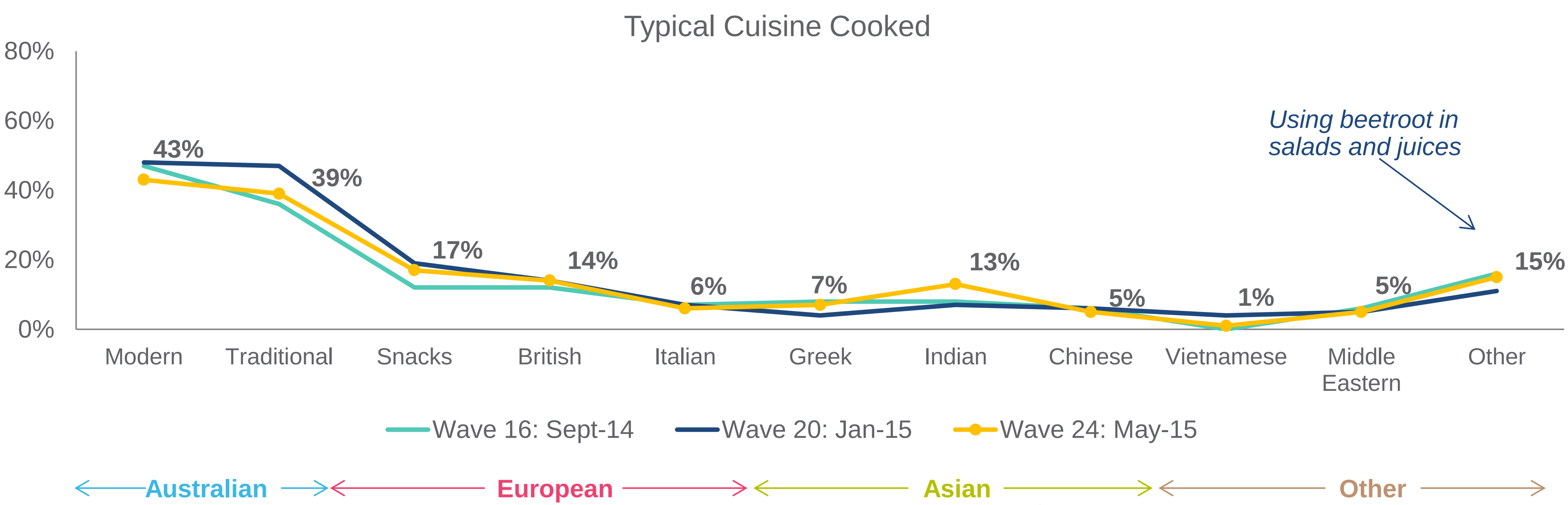
Q7. Which of the following reasons best describes why you purchase <commodity> ?
Q8. Which reason best describes why you don't buy <commodity> more often?
Sample Wave 16 N=241, Wave 20 N=289, Wave 24 N=259

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

Consumption repertoire is limited to dinner and lunch occasions.

Top 5 Consumption Occasions

	Wave 24	Wave 20	Wave 16
Weekday Dinner	**42%**	40%	38%
Weekend Dinner	**34%**	33%	28%
Family meals	**30%**	27%	29%
Weekday Lunch	**27%**	28%	29%
Everyday	**24%**	27%	27%



Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?
Sample Wave 16 N=241, Wave 20 N=289, Wave 24 N=259

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

The most popular cooking styles are boiling beetroots and roasting. Baking has consistently trended upwards over recent waves.

Consumers opt to serve beetroot with carrot, tomatoes and potatoes.

Accompanying Vegetables

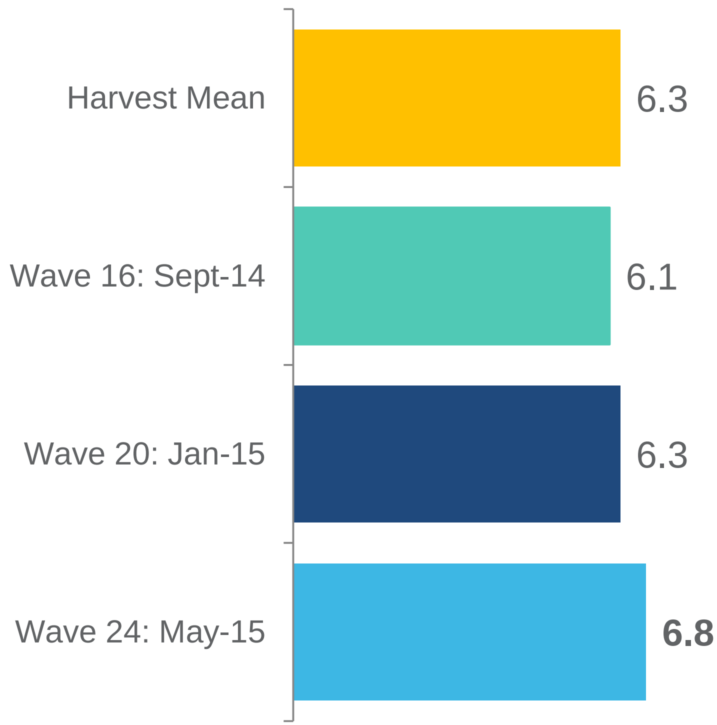
Carrot	41%
Tomato	40%
Potato	38%
Onion	36%
Lettuce	27%

Top Cooking Styles

	Wave 16	Wave 20	Wave 24
Boiling	41%	46%	38%
Roasting	33%	37%	37%
Baking	17%	24%	28%
Raw	27%	27%	26%
Steaming	16%	15%	16%
Soup	12%	9%	14%
Microwave	5%	8%	6%
Stir frying	4%	7%	6%
Stewing	8%	7%	6%
Puree	4%	7%	6%

Q9. How do you typically cook <commodity>?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
Sample Wave 16 N=241, Wave 20 N=289, Wave 24 N=259

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



AUSTRALIAN GROWN

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

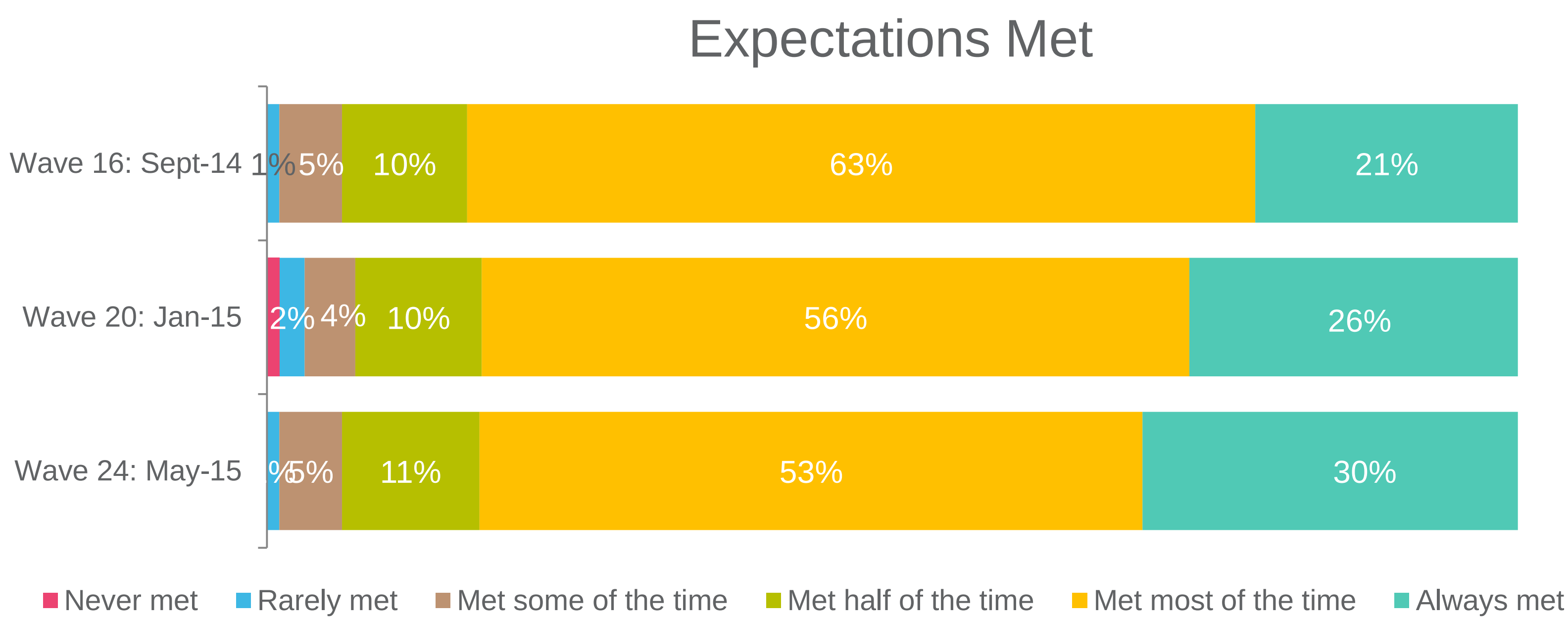
Q14. When purchasing <commodity>, how important is Provenance to you?
Mean scores out of 10.
Sample Wave 16 N=241, Wave 20 N=289, Wave 24 N=259

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

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

Expected to stay fresh for **10.4** days

▲11.1 times, Wave 16
▲10.9 times, Wave 20



Q12. How long do you expect <commodity> to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy <commodity> ?
Sample Wave 16 N=241, Wave 20 N=289, Wave 24 N=259

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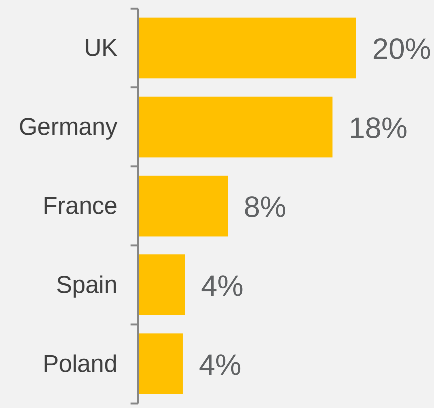
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Trends: Beetroot

Beetroot Global NPDs
March– May 2015

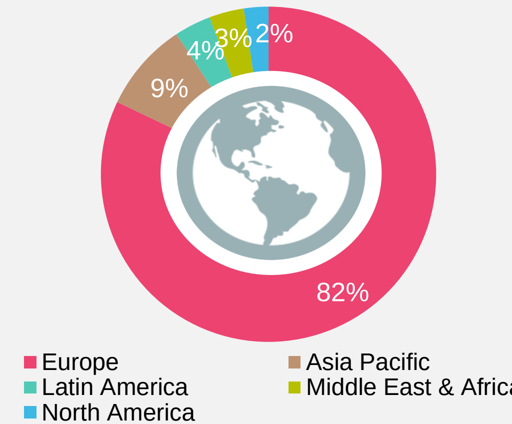
There were 508 products containing beetroot as an ingredient launched globally in the last three months. The majority of these launches occurred in Europe, in particular UK and Germany, which was consistent with past trends. Products were launched in bakery, dairy, confectionery categories and desserts. Health claims were frequently used on product labelling.

Country

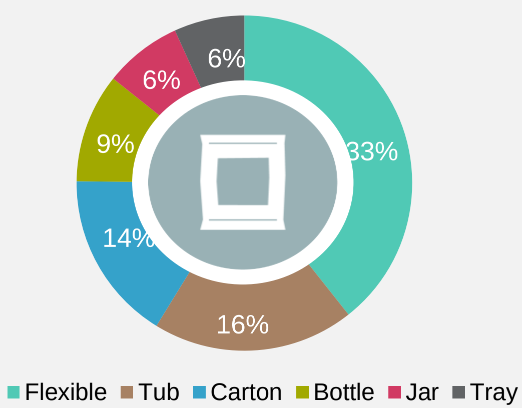


508 Global Launches

Region



Top Pack Formats



Categories

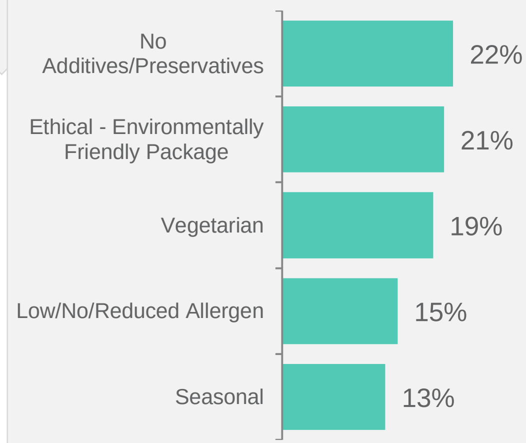
Bakery. 13%

Dairy 13%

Chocolate Confect. 11%

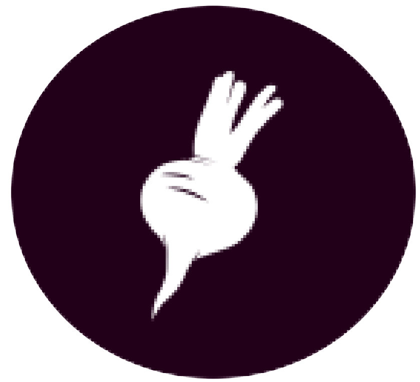
Desserts & Ice-cream 10%

Top Claims



Beetroot Product Launches:
Last 3 Months (March– May 2015)
Summary

- There were 508 global beetroot products launched globally over the last three months.
- There were twelve products launched in Australia. A few of these products were dips and vitamin supplements.
- The majority of products were launched in Europe (82%). Key countries for launches were the UK (20%) and Germany (18%), consistent with previous trends.
- Flexible packaging was the most common format used (33%). Tubs were also common formats (16%).
- Top launch categories were Bakery (13%), Dairy (13%), Chocolate Confectionery (11%) and Desserts and Ice-creams (10%). It appears that beetroot is largely used as a colouring for desserts, ice-creams and dairy.
- Popular claims were around No additives/preservatives (22%), Ethical – Environmentally Friendly Packaging (21%), Vegetarian (19%) and Reduced allergen (15%).
- The most innovative beetroot product launched was Beetroot Ketchup from France (examples of these can be found in the following pages).

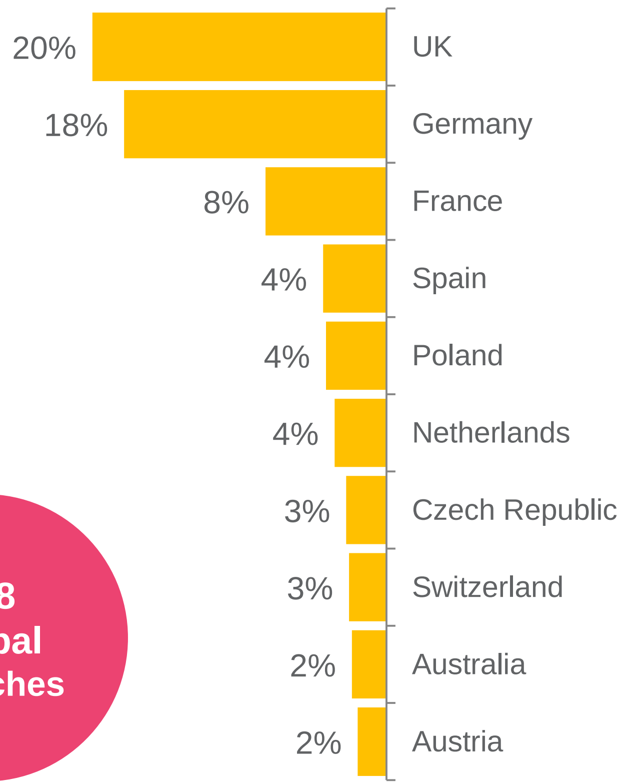


Source: Mintel (2015)

Beetroot Launches

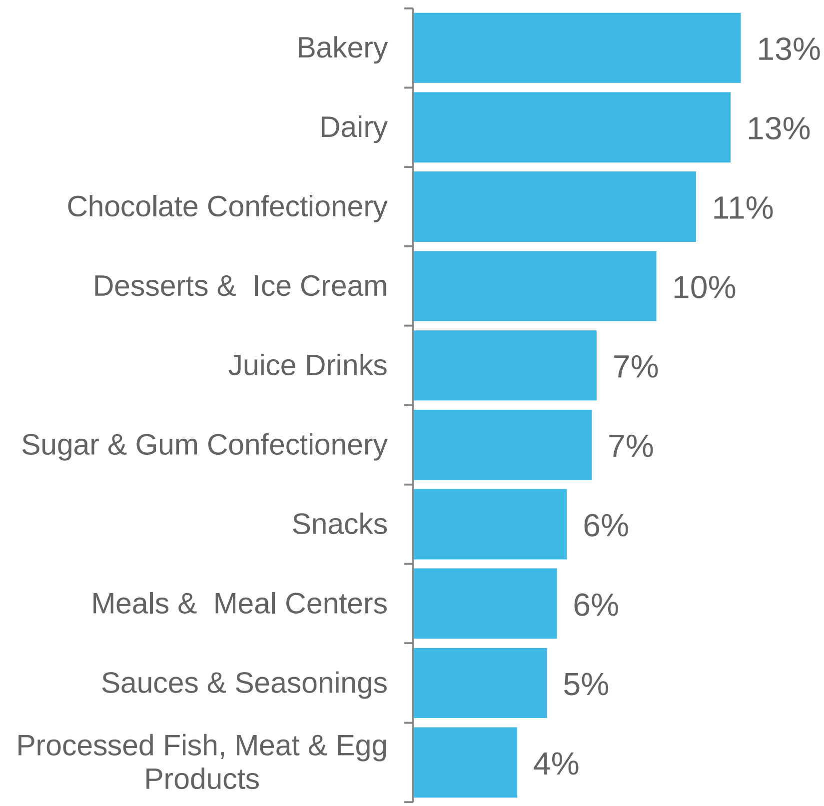
UK and Germany were the main countries for launches. Over the past three months bakery, dairy, desserts, confectionary and ice cream were the key categories for products launched.

Top Launch Countries



508 Global Launches

Top Launch Categories



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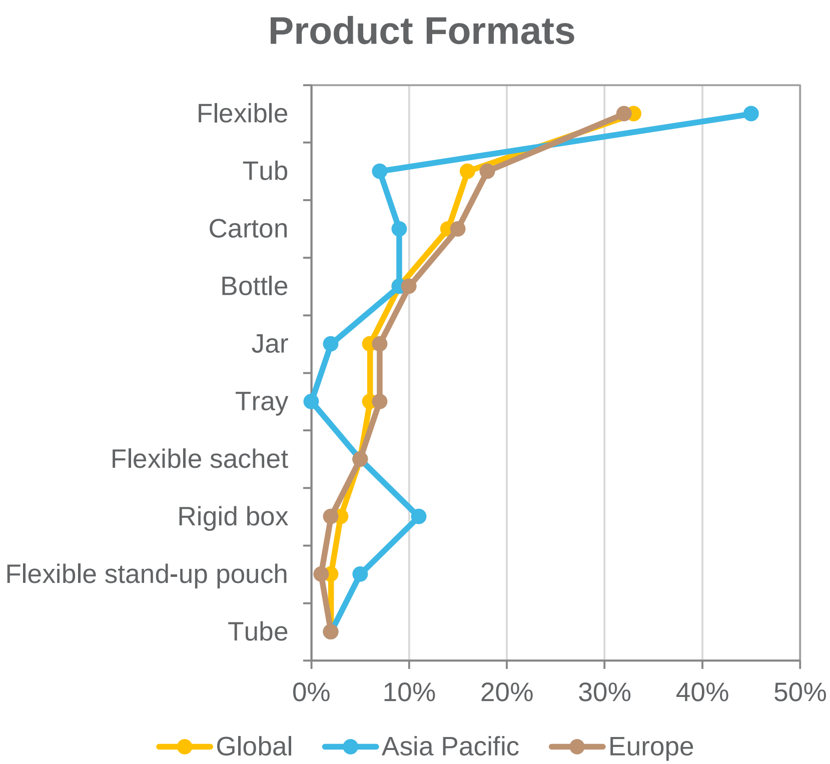
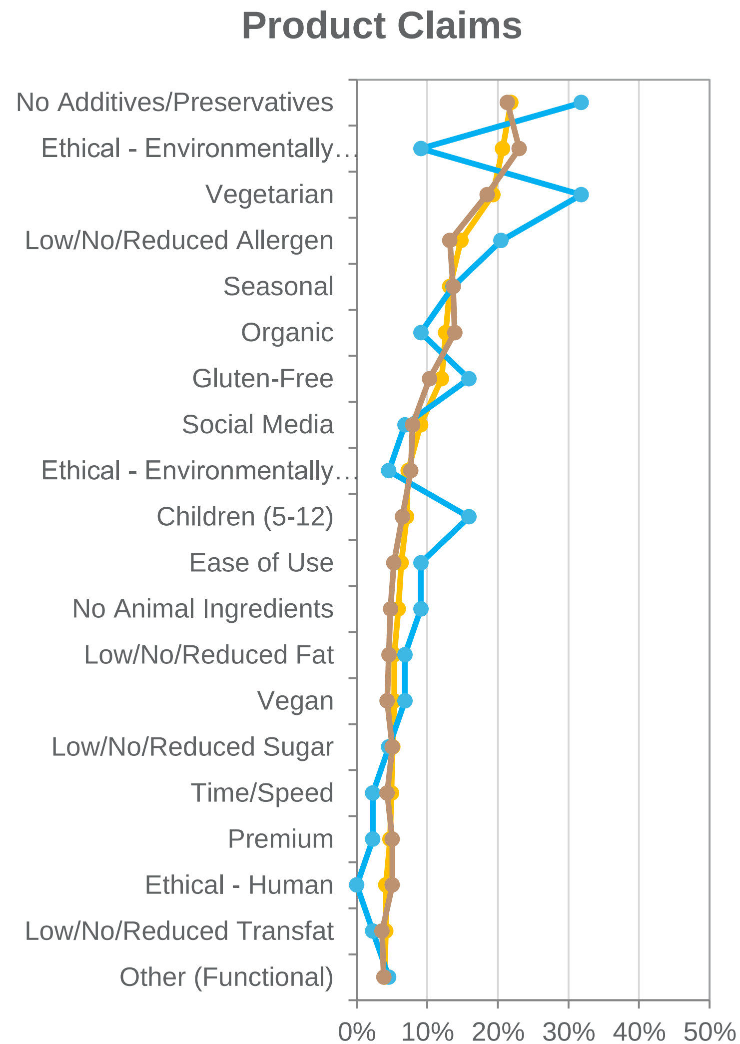
Claims & Pack Formats

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

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





Only regions with n >30 are displayed

Innovative Beetroot Launches:
L3M (March– May 2015)

Papagrin Beetroot & Ginger Raw Sesame Crackers (UK)

Papagrin Beetroot & Ginger Raw Sesame Crackers are 100% raw and free from fat, sugar and gluten. The organic product is suitable for vegans and Paleo diets and retails in a 20g pack featuring the Green Leaf logo. It was on display at the Natural & Organic Products Europe 2015, London
.

Claims:
Low/No/Reduced Allergen, Gluten-Free, Vegan, Low/No/Reduced Fat, Low/No/Reduced Sugar, Organic, No Animal Ingredients

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

Sunniva Fruit & Vegetable Juice with Apple, Carrot, Raspberry, Lemon, Beetroot & sweetpotato) contains 32% vegetable and is partly made from concentrate. This pasteurised juice is rich in vitamin A, which contributes to normal vision, and vitamin C, which increases the absorption of iron and contributes to the normal function of the immune system, and is a source of potassium, which supports normal muscle function. It has a fresh and delicious taste of raspberry and mild beetroot.

Claims:
Limited Edition

Atlantic Kitchen Vibrant Beets Soup with Tender Wakame Seaweed (UK)

This product is boosted with superfood seaweed, which is rich in iodine, is described as a blend of beetroot and chickpeas with enlivening ginger and wild wakame. is free from dairy and gluten, simply requires heating, and is said to be good for a healthy metabolism. Furthermore it is made with natural ingredients, is a source of potassium, and contains 128 calories per bowl. This microwaveable product can be frozen and retails in a 400g recyclable pack.

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)

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. It is rich in vitamins and minerals, is said to provide the body with revitalizing strength and vitality and retails in a 200ml pack.

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

Source: Mintel (2015)

Innovative Beetroot Launches:
L3M (March– May 2015)

Hofmann Organic Cooked Beetroot (Germany)

Hofmann Fränkische Bio Rote-Bete (Organic Cooked Beetroot) is now available peeled, vacuum packed and gently steamed in its own juice. The open pollinated product is ideal together with meat, fish or venison dishes as well as salads or hot dishes. It retails in a 500g pack, bearing the Biokreis logo.

Claims:
Organic

Garnier Skin Naturals Moisture+ Restore Night Care Recovery Gel-Cream (UK)

Suitable for all skin types including sensitive skin, is developed to help support skin's natural repair cycle at night, improve moisture barriers and stimulate surface skin cell renewal. The powerful non-greasy and fast absorbing formula with revival flower extract and Hydra+ Complex is designed to act on the epidermis to help recover skin's moisture reserves and lock in the hydration needed. According to the manufacturer, the complexion will be left instantly moisturised, velvety soft, fresher, revitalised and comfortable with replenished lasting radiance.

Claims:
Premium, Microwaveable

De Rit Organics Beetroot Crisps with Sea Salt (Germany)

De Rit Organics Rote Bete Chips (Beetroot Crisps with Sea Salt) now available gently baked in high quality cold pressed high oleic sunflower oil, which is naturally rich in mono-unsaturated fatty acids and refined with a pinch of sea salt. This organic product is suitable for vegans and retails in a 75g pack.

Claims:
Low/No/Reduced Saturated Fat, Organic, Vegan, No Animal Ingredients

Pur Ketchup Beetroot Ketchup (France)

Pur Ketchup Betterave du Sud-Ouest (Beetroot Ketchup) is made with beetroot from the South-West of France. This 100% natural product is free from preservatives, colourings and gluten, and is described as delicious for flavouring vinaigrettes or for serving with chicken, hamburgers, sandwiches, barbecues or chips, and retails in a 275g pack.

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

Source: Mintel (2014)

Innovative Beetroot Launches:
L3M (March – May 2015)

Waitrose Beetroot Falafels (UK)

Waitrose Beetroot Falafels have been relaunched with a new brand name, previously known as Waitrose Christmas. This sweet and vibrant product is described as beetroot, chick pea, onion and garlic bites seasoned with spices. It is suitable for vegetarians, and now retails in a newly designed 176g widely recycled pack.

.

Claims:

Vegetarian, Ethical - Environmentally Friendly Package

Innocent Apple, Beetroot, Carrot and Ginger Juice Drink (Ireland)

Innocent Apple, Beetroot, Carrot and Ginger Juice Drink is a blend of fruit and veg juices with some ginger. The cold pressed product retails in a 330ml recyclable pack.

Claims:

Ethical - Environmentally Friendly Package

Werda Grated Beetroot (South Africa)

Werda Grated Beetroot has been repackaged. The ready to eat product is made with grape vinegar and naturally fat and cholesterol free. It is also halal certified and suitable for strict vegetarians. It retails in a recyclable 420g pack.

Claims:

Ease of Use, Low/No/Reduced Cholesterol, Ethical - Environmentally Friendly Package, Low/No/Reduced Fat, Halal, Vegetarian

Lebepur Organic Beetroot Powder (Germany)

Lebepur Rote Bete (Organic Beetroot Powder) is said to contain 100% gently dried and ground organic red beet perfect for fruity smoothies. A small amount is sufficient to increase the value of the smoothies with important flavonoids, vitamins and minerals. The raw product is free from additives, suitable for vegans and retails in 150g pack featuring the EU Leaf logo.

Claims:

No Additives/Preservatives, Vegan, No Animal Ingredients, Organic

Source: Mintel (2015)

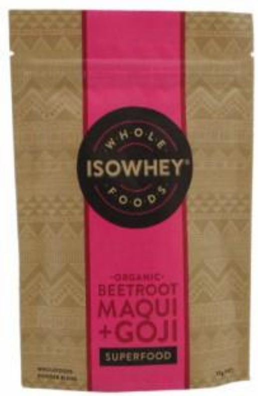
Australian Beetroot Launches:
L3M (March– May 2015)

Thomas Chipman Beetroot Chips

RebootYourLife Red Roar Juice

Black Swan Pop Up Beetroot and Zesty Orange Dip

Isowhey Whole Foods Organic Beetroot, Maqui and Goji Superfood



Coles Australian Spinach and Red Beetroot Leaves

Source: Mintel (2015)

Sweetpotato.

Consumption and purchase have both decreased this wave.

Consumers are purchasing sweetpotato from mainstream and specialist retailers.

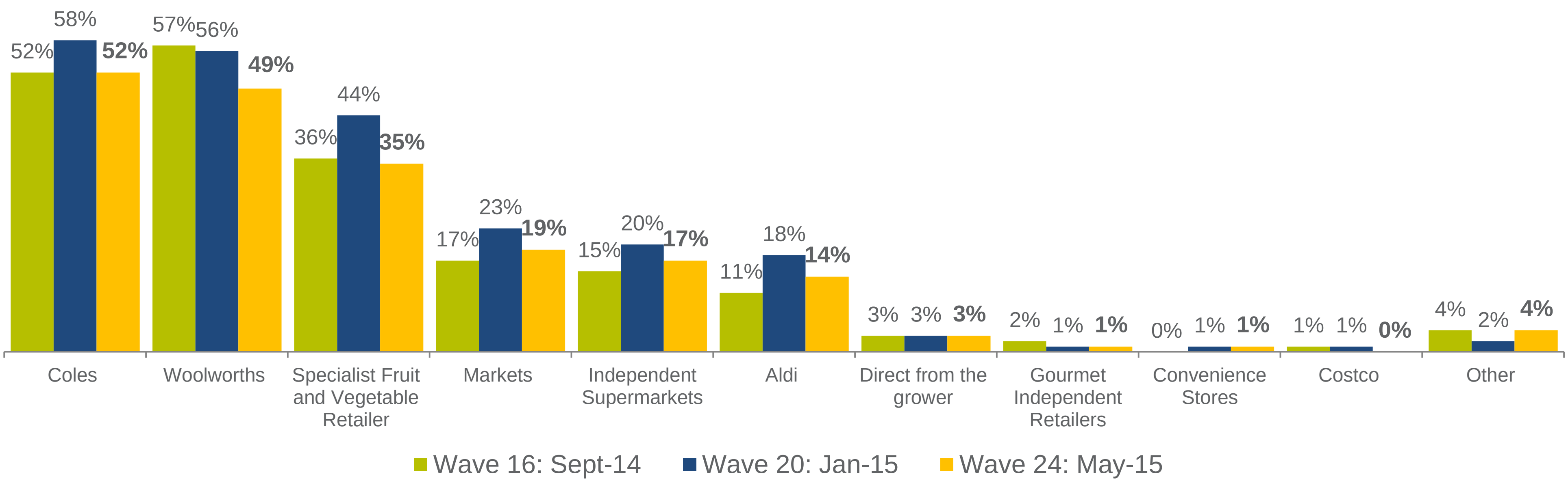
Average Purchase **3.1** times per month

▲ 3.3 times, Wave 16
▲ 3.3 times, Wave 20

Average Consumption **7.0** times per month

▲ 7.2 times, Wave 16
▲ 7.9 times, Wave 20

Purchase Channel



Q1. On average, how often do you purchase <commodity> ?
Q2. On average, how often do you consume <commodity>?
Q5. From which of the following channels do you typically purchase <commodity> ?
Sample Wave 16, N=311, Wave 20, N=353, Wave 24, N=307

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

Perceived value for money remained steady at 6.4/10, however weight of purchase and recalled last spend have both declined this wave.

Average weight of purchase

The average consumer typically purchased 1.0kg of sweetpotatoes in May 2015.

▲ 1.1kg, Wave 16
▲ 1.1kg, Wave 20

Recalled last spend

The average recalled last spend was for sweetpotatoes was $3.50.

▲ $3.60, Wave 16
▲ $4.00, Wave 20

Value for money

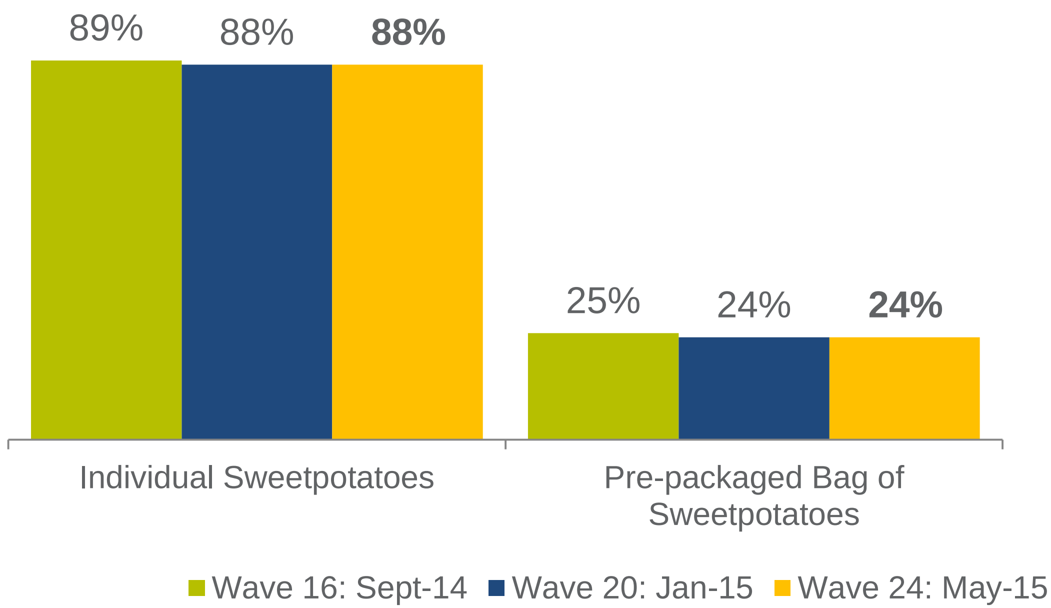
On average, consumers perceived sweetpotatoes to be good value for money (6.4/10).

▲ 6.5/10, Wave 16
— 6.4/10, Wave 20

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 16, N=311, Wave 20, N=353, Wave 24, N=307

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

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

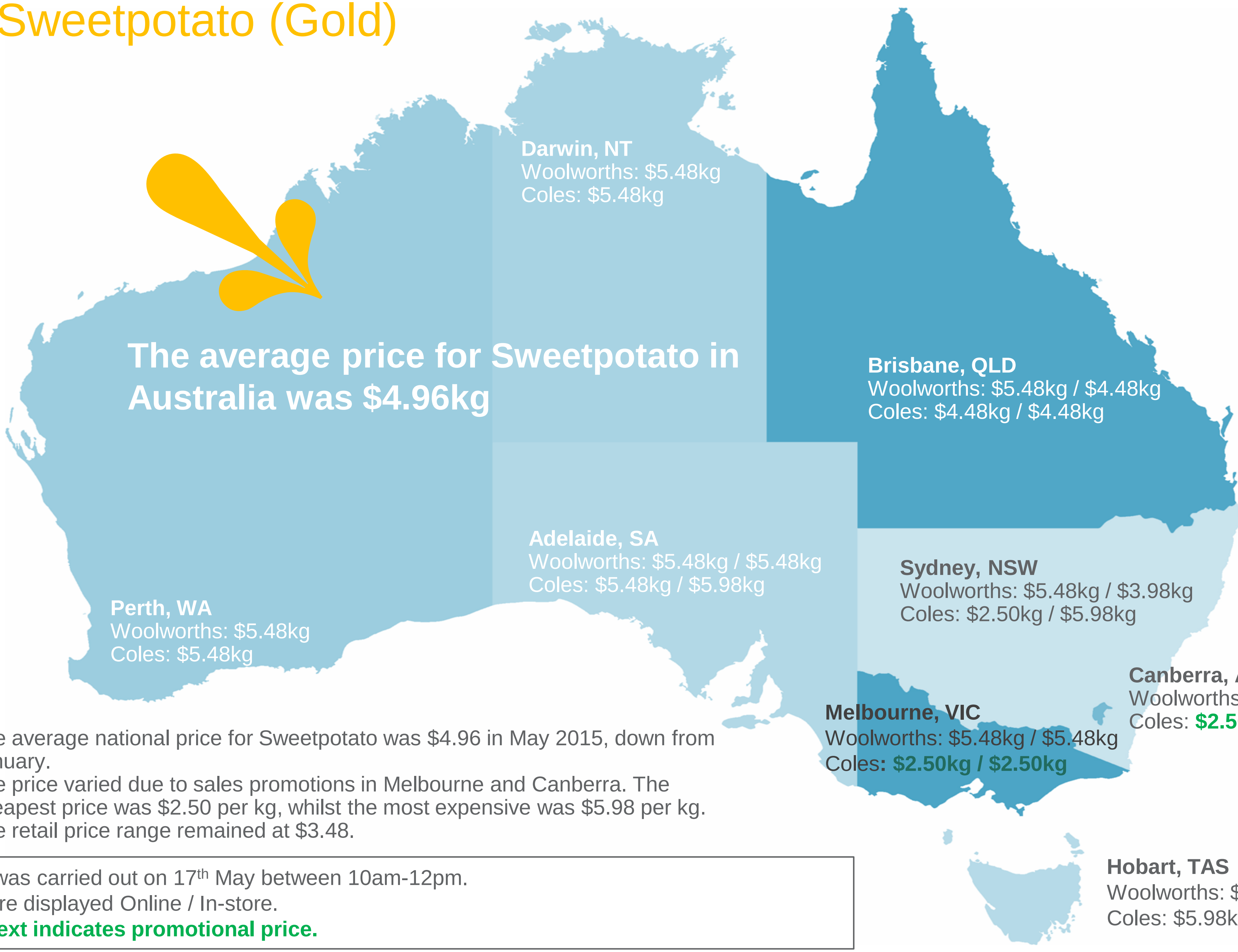


	Individual	Bag
Wave 16	2.6	1.8
Wave 20	2.6	1.9
Wave 24	2.4	2.0

Q3a. How much <commodity> does this typically equate to?
Sample Wave 16, N=311, Wave 20, N=353, Wave 24, N=307

Online and In-store Commodity Prices

Sweetpotato (Gold)

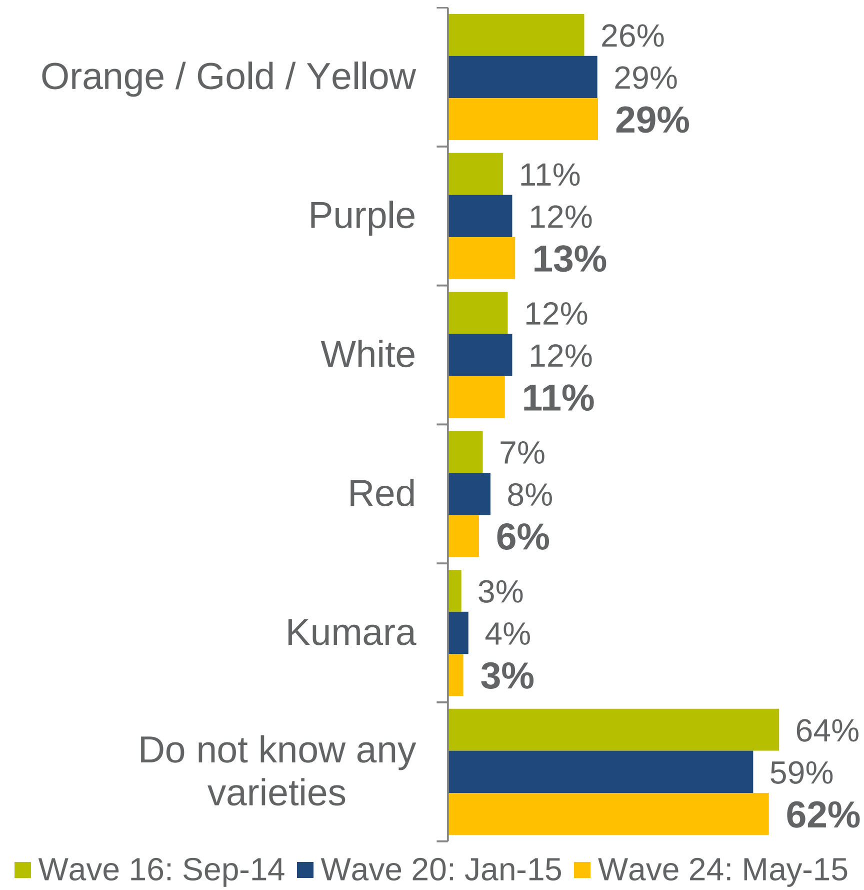


- The average national price for Sweetpotato was $4.96 in May 2015, down from January.
- The price varied due to sales promotions in Melbourne and Canberra. The cheapest price was $2.50 per kg, whilst the most expensive was $5.98 per kg.
- The retail price range remained at $3.48.

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

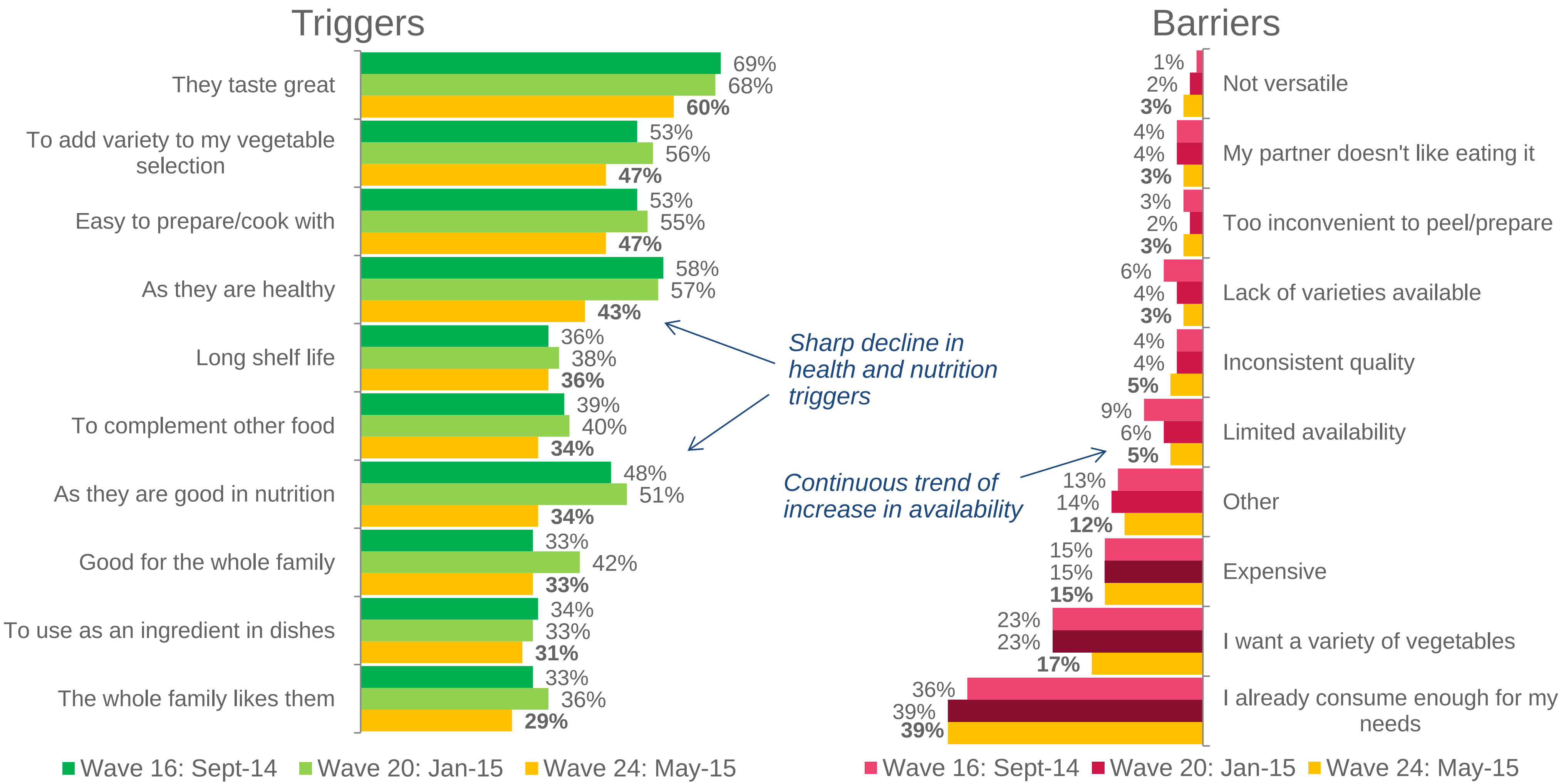
Almost two thirds of consumers are unable to recall a type, consistent with past months.

The orange/gold sweetpotato has the greatest awareness, followed by the purple variety.



Q6a. What varieties of <commodity> are you aware of? (unprompted)
Sample Wave 16, N=311, Wave 20, N=353, Wave 24, N=307

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



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 N=307

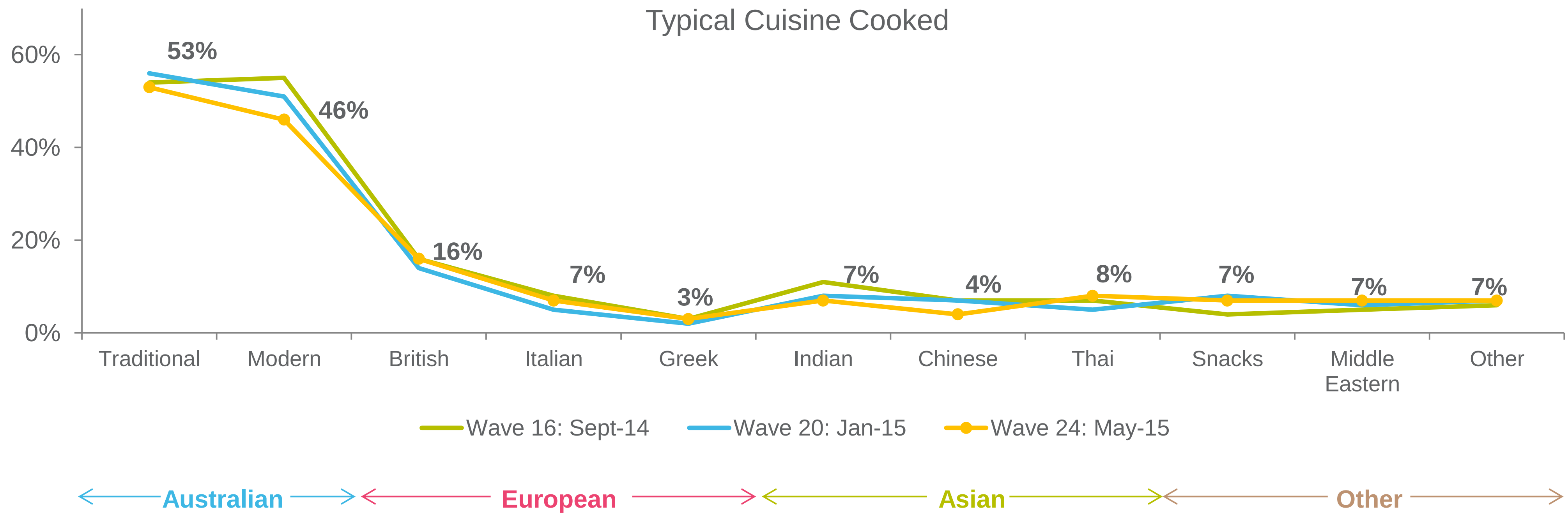
Horticulture Innovation Australia

colmar brunton.

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

Top 5 Consumption Occasions

	Wave 24	Wave 20	Wave 16
Weekday Dinner	**56%**	62%	60%
Weekend Dinner	**44%**	47%	44%
Family meals	**33%**	39%	36%
Everyday	**24%**	29%	32%
Quick Meals	**17%**	19%	13%



Q10. What cuisines do you cook/consume that use <commodity> ?
Q11. Which of the following occasions do you typically consume/use <commodity> ?
Sample Wave 24, N=307

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

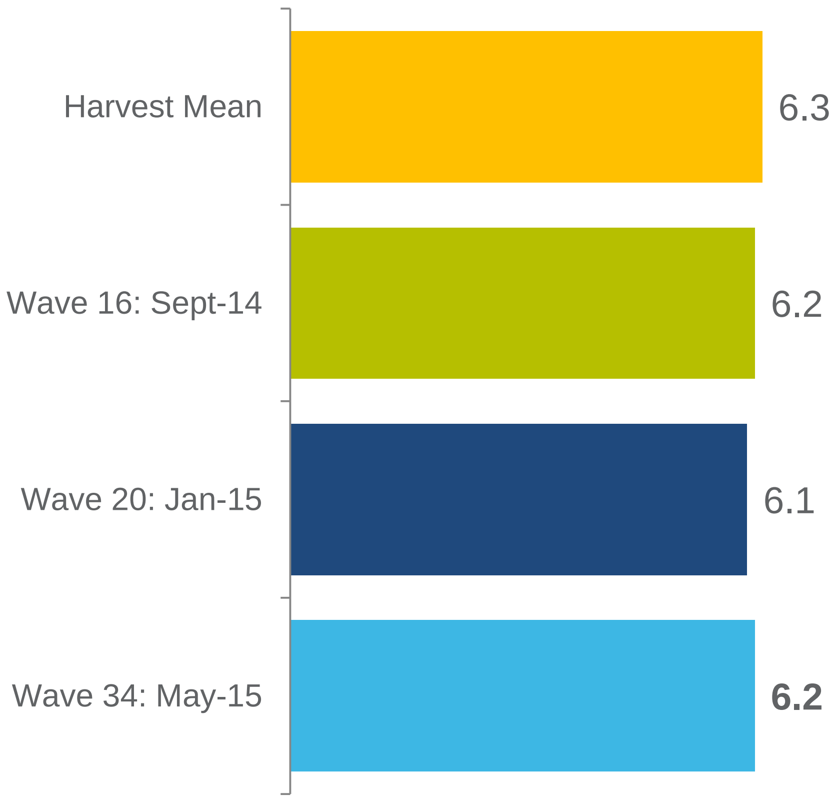
Consistent with previous waves, consumers prefer to roast, mash and bake sweetpotato. They are generally served with potatoes, carrots and broccoli.

Accompanying Vegetables	
Potato	53%
Carrot	50%
Broccoli	40%
Green Peas	40%
Pumpkins	40%

Top Cooking Styles			
	Wave 16	Wave 20	**Wave 24**
Roasting	61%	62%	**56%**
Mashing	43%	46%	**49%**
Baking	45%	47%	**43%**
Boiling	32%	41%	**33%**
Soup	23%	26%	**26%**
Steaming	28%	29%	**25%**
Stewing	11%	15%	**13%**
Microwave	13%	17%	**12%**
Shallow Frying	6%	11%	**8%**
Puree	6%	8%	**8%**

Q9. How do you typically cook <commodity> ?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
Sample Wave 24, N=307

Importance of sweetpotato provenance has increased slightly but still remains below the Harvest mean, indicating consumers do not value provenance as highly for this commodity.



AUSTRALIAN GROWN

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

Q14. When purchasing <commodity>, how important is Provenance to you?
Mean scores out of 10.
Sample Wave 16, N=311, Wave 20, N=353, Wave 24, N=307

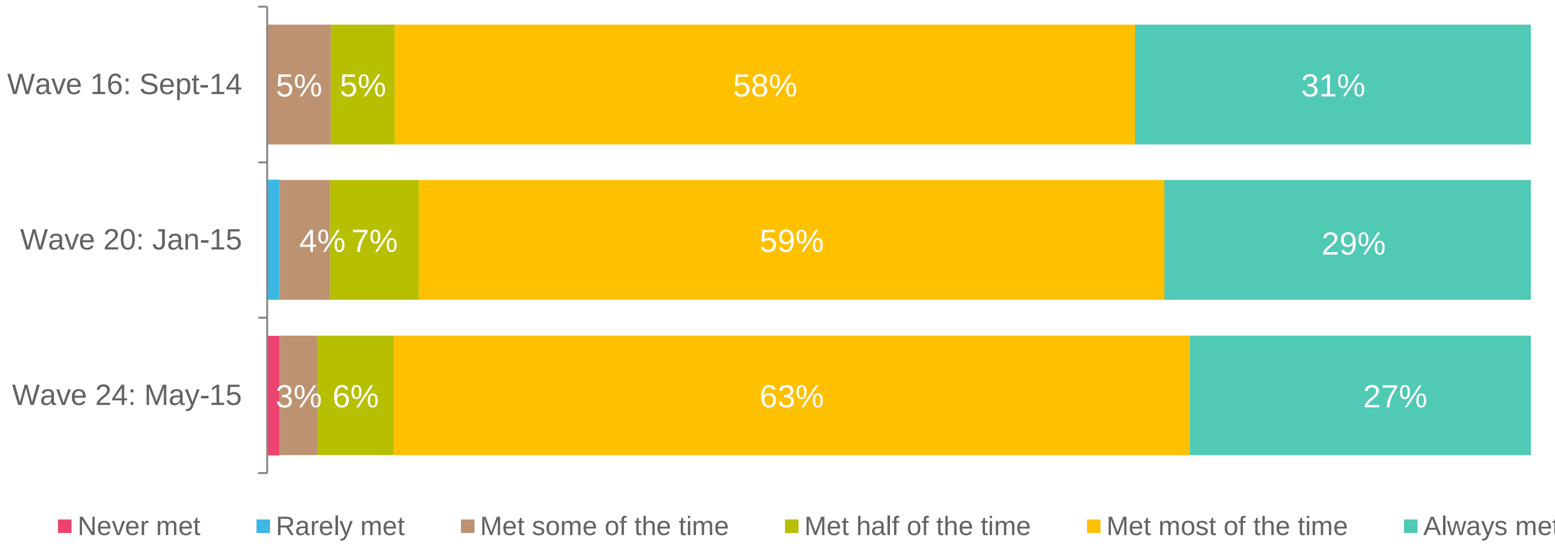
In recent waves, there has been a downwards trend in sweetpotatoes always meeting the expected length of freshness.

Expectations have increased this month. Comparatively to other vegetables, sweetpotatoes have a long shelf life once purchased of nearly two weeks.

Expected to stay fresh for **13.9** days

▼ 13.1 days, Wave 16
▼ 12.3 days, Wave 20

Expectations Met



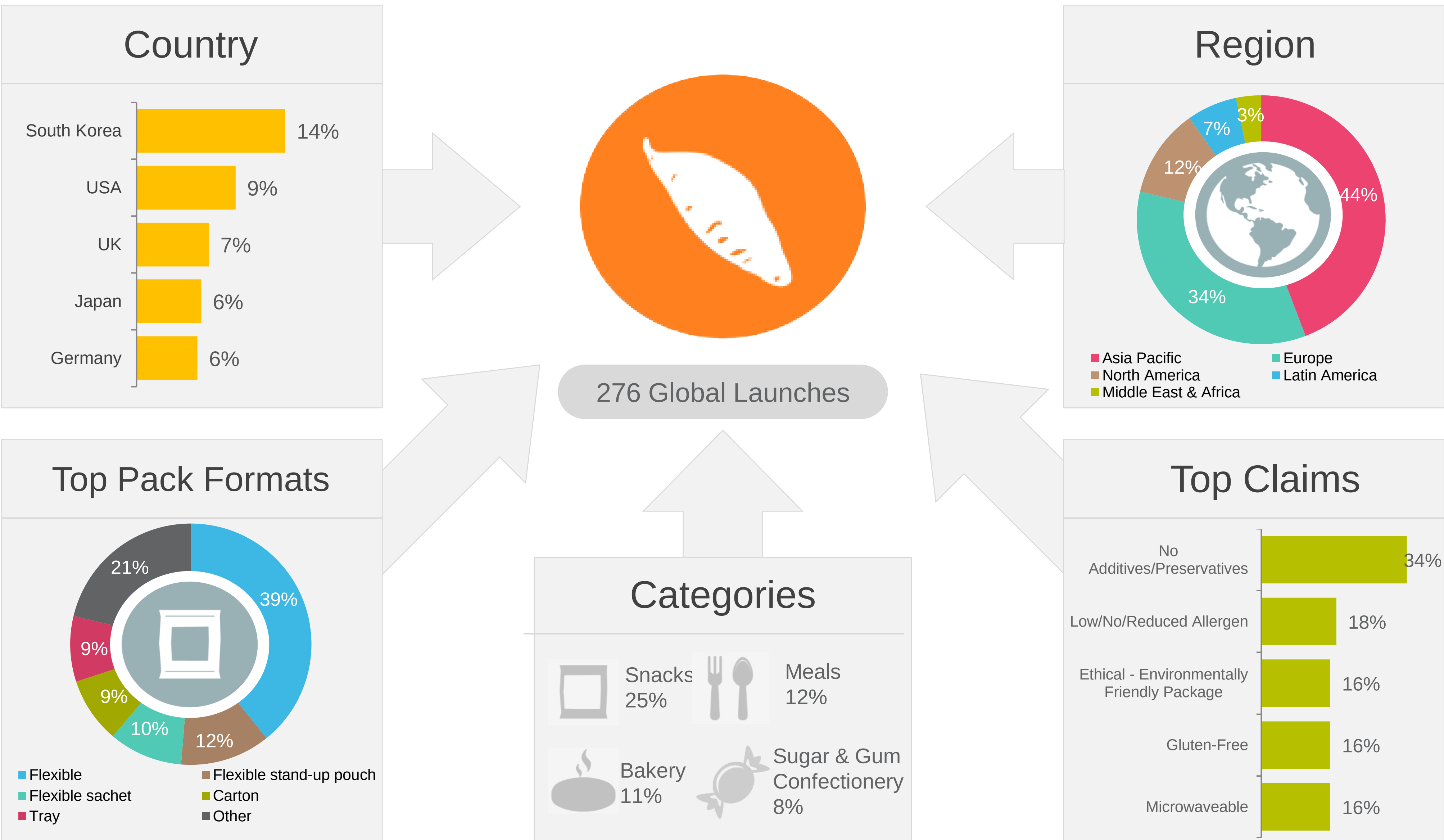
Q12. How long do you expect <commodity> to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy <commodity> ?
Sample Wave 16, N=311, Wave 20, N=353, Wave 24, N=307

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

Trends: Sweetpotato

Sweetpotato Global NPDs
March– May 2015

There were 276 global launches over the past three months that contained Sweetpotato as an ingredient. These were launched in Europe and Asia Pacific, particularly in South Korea and USA. Key categories for launches were snacks, meals and bakery items.



Sweetpotato Product Launches:
L3M (March 2015 – May 2015)
Summary

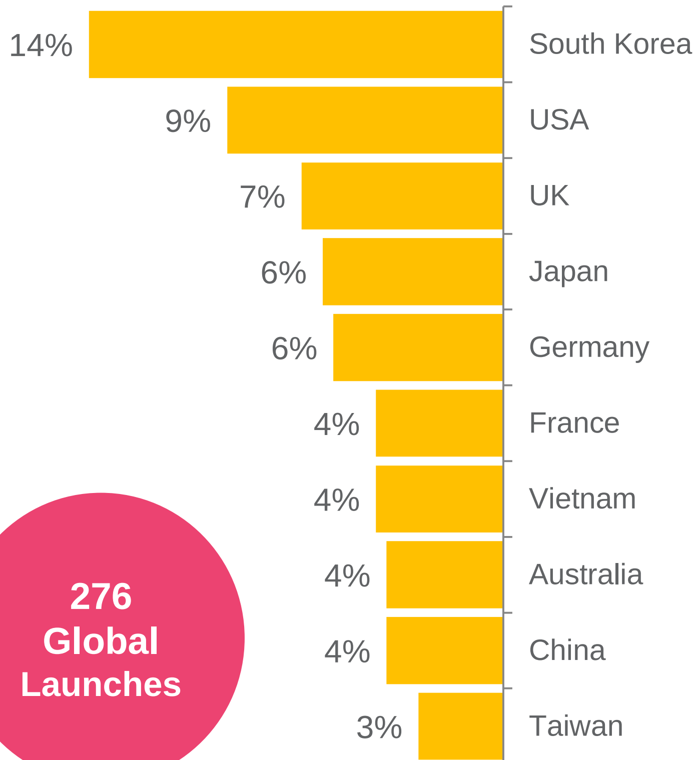
- There were 276 Sweetpotato products launched globally over the last three months.
- There were eleven products launched in Australia, considerably higher than the three launches in July-September 2014 and nine launches in November 2014 - January 2015. Products included dips and snack products.
- Products were predominately launched in Asia Pacific (44%) and Europe (34%).
- The main category launches were snacks (25%), meals (12%), and bakery items (11%).
- Common pack formats used were flexible packaging (39%), trays (21%) and flexible stand-up pouches (12%).
- Popular claims used on products were No additives/preservatives (34%), low/reduced/no allergen (18%), and ethical-environmentally friendly packaging (16%).
- The most innovative products launched included Vanilla Creamed sweetpotato with Cherries from Argentina. Other examples can be found on the following pages.

Source: Mintel (2015)

Sweetpotato Launches

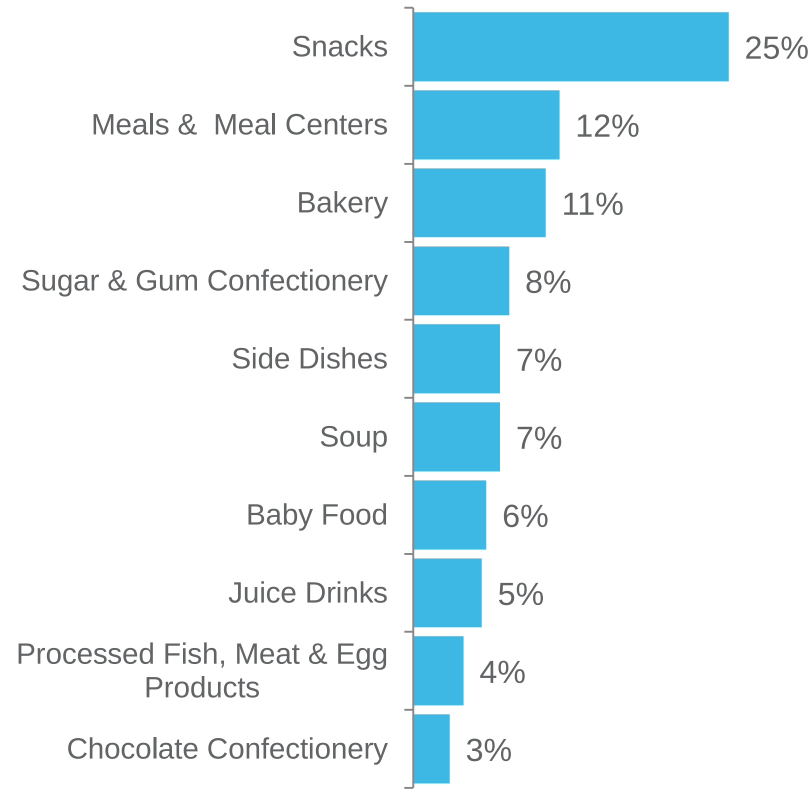
South Korea and USA had the greatest number of sweetpotato product launches. The main category for products were snacks.

Top Launch Countries



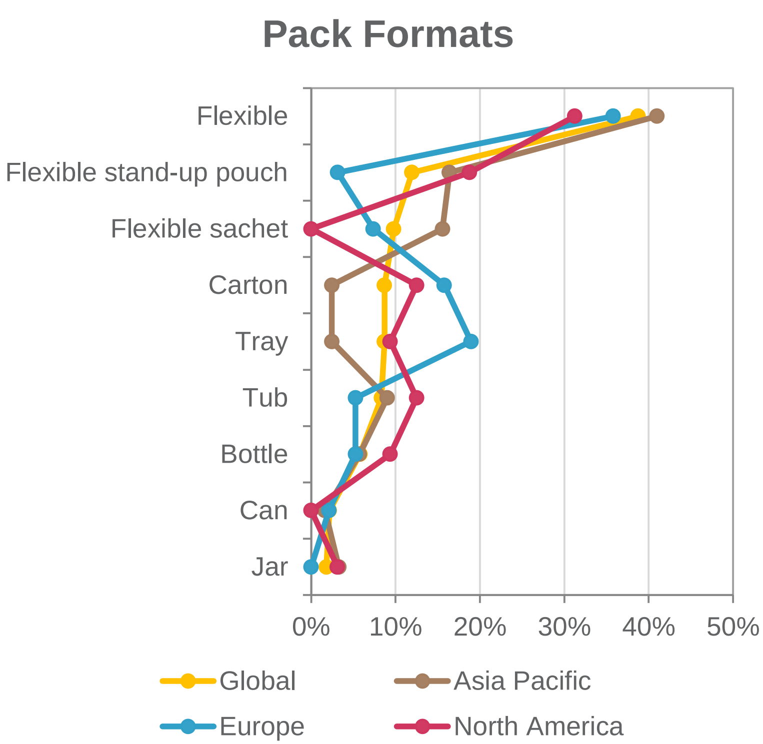
276 Global Launches

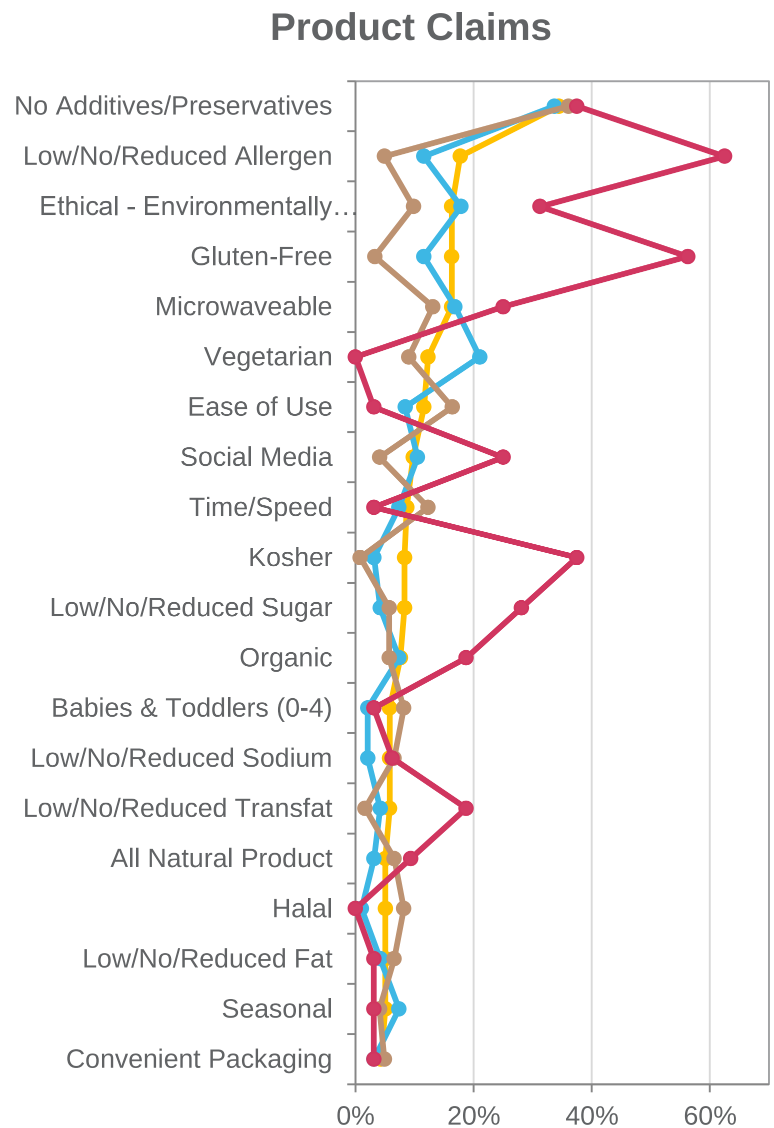
Top Launch Categories



Claims & Pack Formats

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





Innovative Sweetpotato Launches:
L3M (March – May 2015)

Udi's Gluten Free sweetpotato Ravioli (USA)

Udi's Gluten Free sweetpotato Ravioli comprises gluten free sweetpotato ravioli tossed with kale, portobellos and red peppers in light sauce. The microwaveable product provides 3g of fiber and 5g of protein per serving, and retails in an 8-oz. recyclable pack featuring the Facebook and Twitter logos.

Claims:

Gluten-Free, Social Media, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Package, Microwaveable

Asda Simply Roast Butternut Squash & sweetpotato (UK)

Asda Simply Roast Butternut Squash & sweetpotato is made with one and a half sweetpotatoes, a handful of squash and heaps of taste. The vegetarian product retails in a 375g recyclable pack sufficient for four servings.

Claims:

Vegetarian, Ethical - Environmentally Friendly Package

Peacock Food Collection Syrup Glazed sweetpotato with Almonds (South Korea)

Peacock Food Collection Syrup Glazed sweetpotato with Almonds are fried until crispy then coated with sweet rice syrup, which is made of domestic rice, and topped with whole almond. Described as sweet and nutty, this product can be defrosted in twenty minutes or microwaved in thirty seconds and retails in a 210g pack.

Claims:

Time/Speed, Microwaveable

Heinz Little Kidz sweetpotato & Lean Beef Hotpot (UK)

Heinz Little Kidz sweetpotato & Lean Beef Hotpot has been reformulated and is now available with a new recipe. The meal provides three of a baby's five-a-day portions of fruit and vegetables and comprises six different vegetables. It is low in salt, contains no artificial colours, flavours or preservatives and is a source of iron, which is said to support normal cognitive development. The microwaveable product is recommended for children aged one to three years old, is easy to prepare and

Claims:

No Additives/Preservatives, Ethical - Environmentally Friendly Package, Microwaveable, Ease of Use, Low/No/Reduced Sodium, Babies & Toddlers (0-4)

Source: Mintel (2015)

Innovative Sweetpotato Launches:
L3M (March – May 2015)

Myungsung Food Yellow sweetpotato Chips (South Korea)

Myungsung Food Yellow sweetpotato Chips are made with 100% Korean yellow sweetpotatoes, also known as pumpkin sweetpotatoes or honey sweetpotatoes for its sweetness. These premium vegetable chips are vacuum-fried and retail in a 60g pack bearing the HACCP logo.

Claims:
Premium

Esnaola Vanilla Creamed sweetpotato with Cherries (Argentina)

Esnaola Dulce de Batata a la Vainilla con Cerezas (Vanilla Creamed sweetpotato with Cherries) is now available. This kosher certified product is free from T.A.C.C. and gluten, and retails in a 700g pack.

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

Tesco sweetpotato Chips (UK)

Tesco sweetpotato Chips are cooked in pure sunflower oil, and provides one of the five-a-day recommended portions of fruit and vegetables per 80g serving. The oven-cooked product is suitable for vegetarians, features a seasoned coating, and retails in a 500g pack.

Claims:
Vegetarian

Ella's Kitchen Organic sweetpotato (Norway)

Ella's Kitchen Økologisk Søtpoteter (Organic sweetpotato) is suitable babies from four months old. This product is made with organic sweetpotatoes steamed in water and contains only natural sugars. It is gluten free and retails in a 70g pack featuring the EU Green Leaf logo.

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

Source: Mintel (2015)

Innovative Sweetpotato Launches:

L3M (March – May 2015)

Kid's Choice Organic O' Kids Garden sweetpotato Biscuits (South Korea)

Kid's Choice Organic O' Kids Garden sweetpotato Biscuits have been repackaged. This certified organic product contains 1.94% steamed sweetpotato powder, and is said to be made using child-safe sugar, oil and flour. The product retails in a 70g pack bearing the HACCP logo. It was on display at the ISM 2015, Cologne.

Claims:

Organic, Children (5-12)

Mujirushi Ryohin sweetpotato Baumkuchen (Japan)

Mujirushi Ryohin sweetpotato Baumkuchen is a moist cake with sweetpotato paste, and is claimed to resemble a sweetpotato dessert. Launched on March 17, 2015 with an RRP of 180 yen.

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Claims:

N/A

Tesco sweetpotato and Goat's Cheese Lattice Pie (UK)

Tesco sweetpotato and Goats Cheese Lattice Pie is described as puff pastry pie filled with sweetpotato, goats' cheese and spinach. It contains no artificial preservatives, flavours, colours or hydrogenated fat. The limited edition product is suitable for vegetarians, and retails in a 200g recyclable pack.

Claims:

No Additives/Preservatives, Low/No/Reduced Transfat, Vegetarian, Ethical - Environmentally Friendly Package, Limited Edition

SP Story Semi Dried Baked sweetpotato (South Korea)

SP Story Semi Dried Baked sweetpotato is described as well-being and healthy, made with 100% Korean sweetpotato, which has been infrared ray baked and dried. This product can be microwaved for a softer texture and can be served with milk or coffee as a meal replacement or a nutritious snack. It retails in a 300g pack.

Claims:

Microwaveable

Source: Mintel (2015)

Australian Sweetpotato Launches:
L3M (March – May 2015)

Heinz Soup of the Day sweetpotato, Veg and Chickpea with Warm Spices Soup.

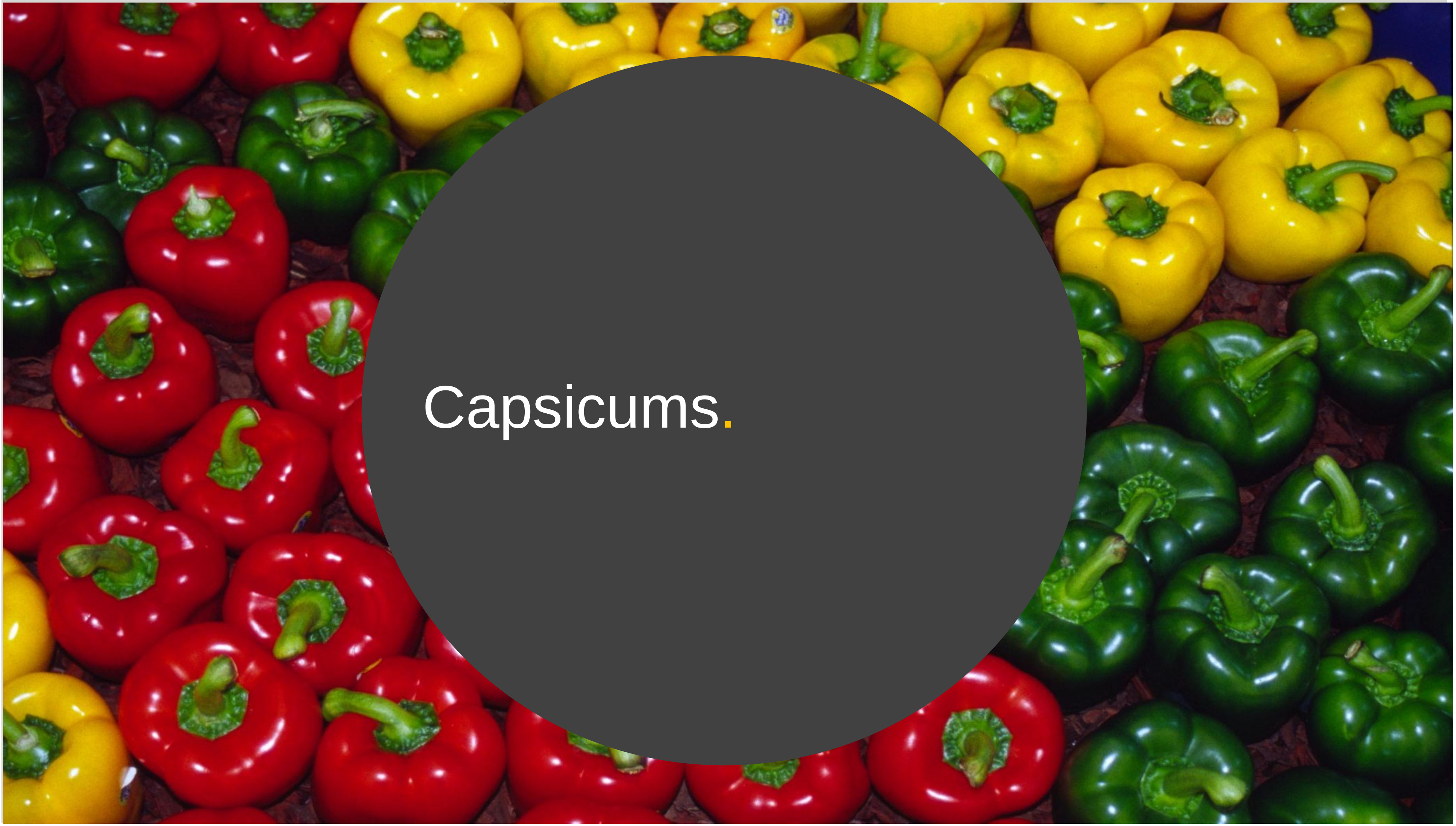
Woolworths Created with Jamie Smokin' sweetpotato & Chorizo Soup

La Gina All Good La Zuppa Moroccan Pumpkin with Chickpea Soup

Baby Macro Organic Meal Time Pumpkin, Spinach, Ricotta and Pasta

Greenday Mixed Fruit Chips

Source: Mintel (2015)



Capsicums.

Purchase and consumption were lower than the previous wave.

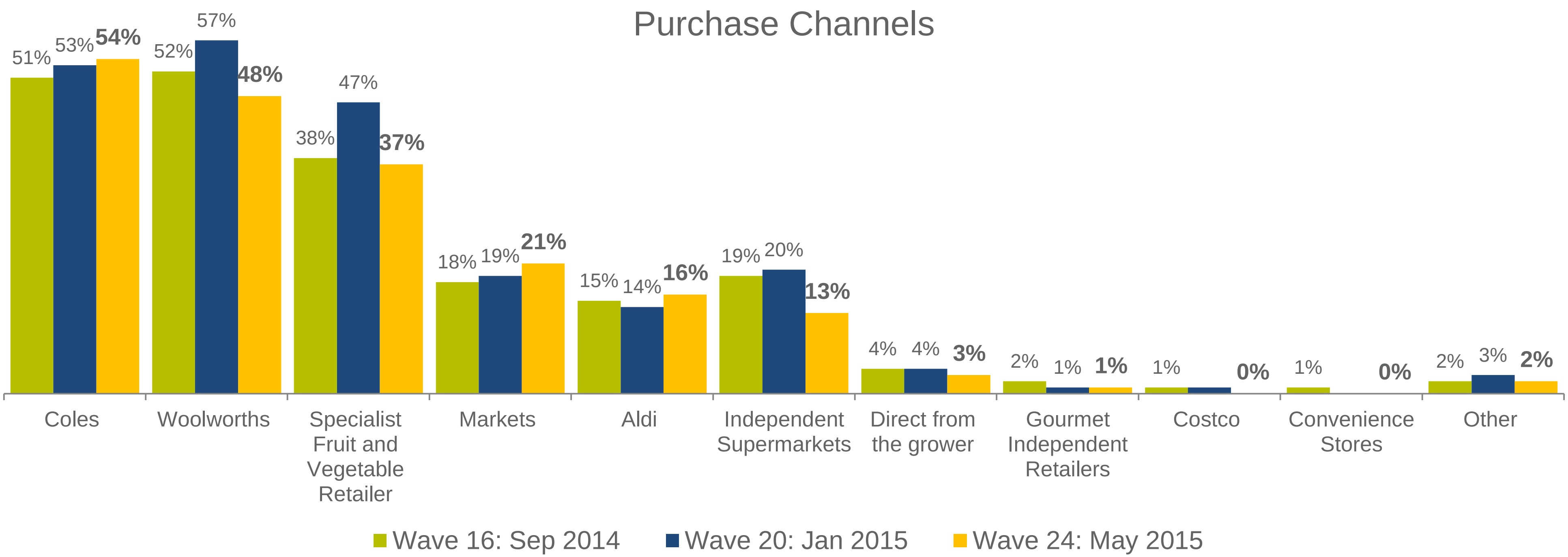
Capsicum is generally purchased from mainstream and specialist retailers. Specialist retailers experienced a decline in purchases this wave, whilst markets have shown a consistent upwards trend.

Average Purchase **3.5 times** per month

▲ 3.8 times, Wave 16
▲ 3.9 times, Wave 20

Average Consumption **9.2 times** per month

▲ 9.6 times, Wave 16
▲ 10.5 times, Wave 20



Q1. On average, how often do you purchase <commodity>?
Q2. On average, how often do you consume <commodity>?
Q5. From which of the following channels do you typically purchase <commodity>?
Sample Wave 16, N=309, Wave 20, N=353, Wave 24, N=307

Horticulture Innovation Australia

colmar brunton.

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

Average spend, price and value perceptions have declined from previous waves.

Average weight of purchase

The average consumer typically purchased **610g** of Capsicum in May 2015, which is lower than the previous two waves.

▲ 710g, Wave 16
▲ 640g, Wave 20

Recalled last spend

The average recalled last spend for Capsicum was **$3.60**, which has trended downwards since Wave 16.

▲ $3.70, Wave 16
▲ $3.90, Wave 20

Value for money

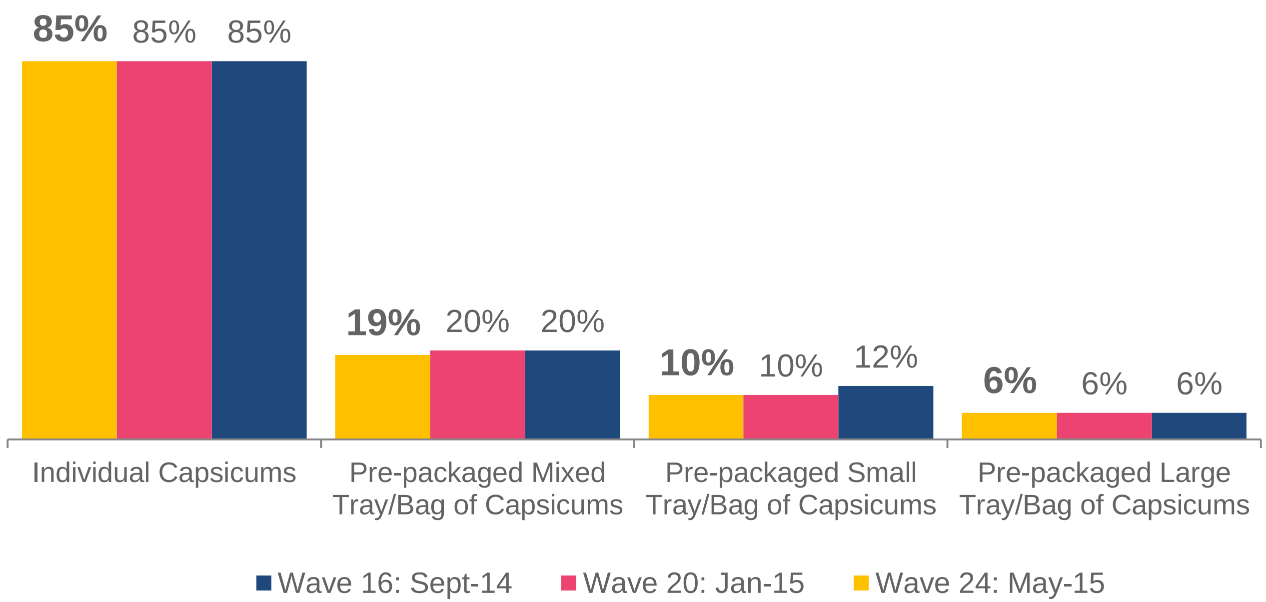
On average, consumers perceived Capsicum to be fair value for money **(5.7/10)**, slightly decreasing from the previous wave.

▲ 5.9/10, Wave 16
▲ 5.9/10, Wave 20

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 16, N=309, Wave 20, N=353, Wave 24, N=307

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

Individual capsicums remain the key format for purchase, consistent with previous waves. Consumers typically purchase two per shop.

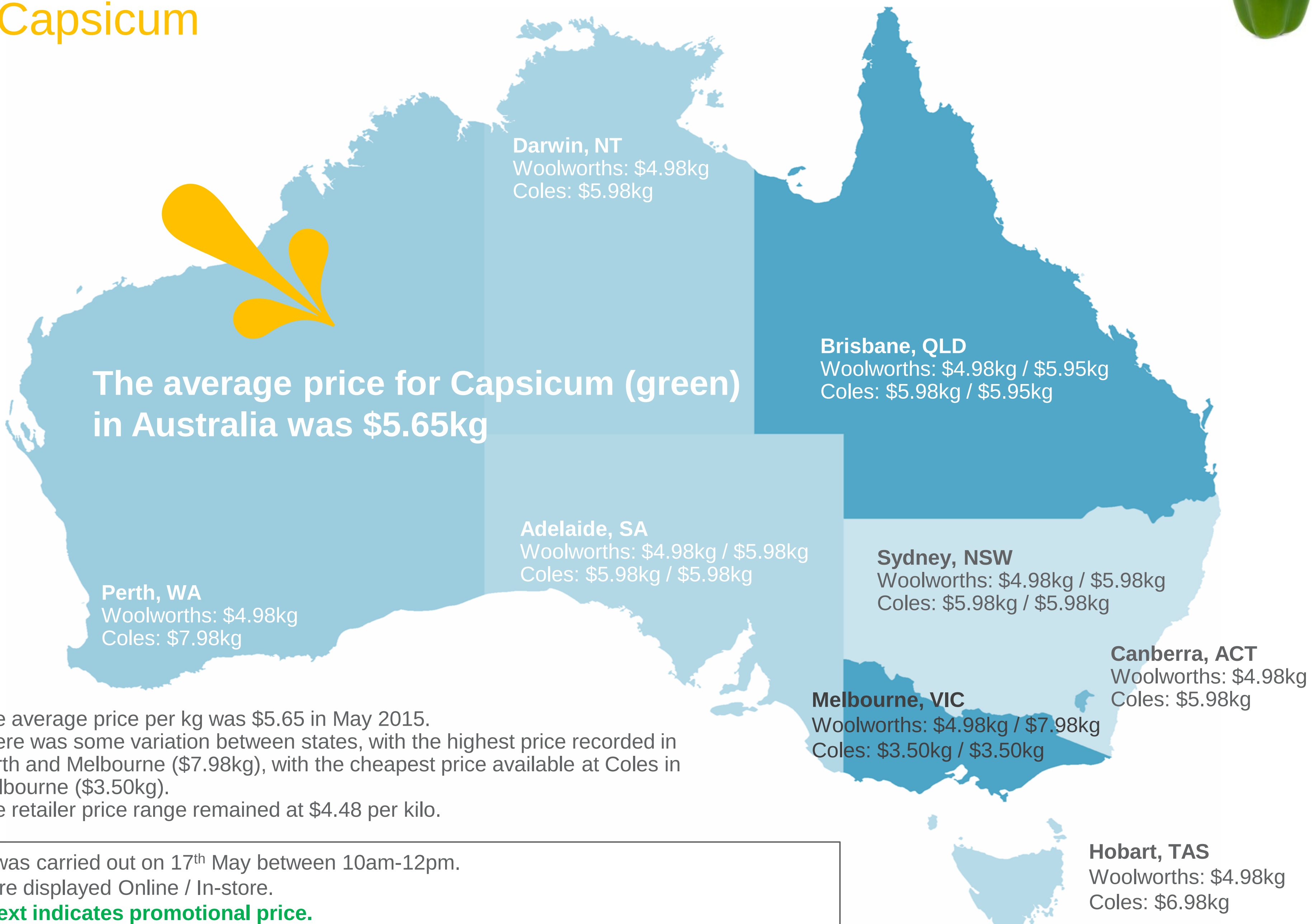


	Individual	Mixed Tray	Small Tray	Large Tray
Wave 16	2.5	1.8	1.7	2.2
Wave 20	2.4	1.4	1.6	1.7
Wave 24	2.4	1.9	1.7	1.9

Q3a. How much <commodity> does this typically equate to?
Sample Wave 16, N=309, Wave 20, N=353, Wave 24, N=307

Online and In-store Commodity Prices

Capsicum

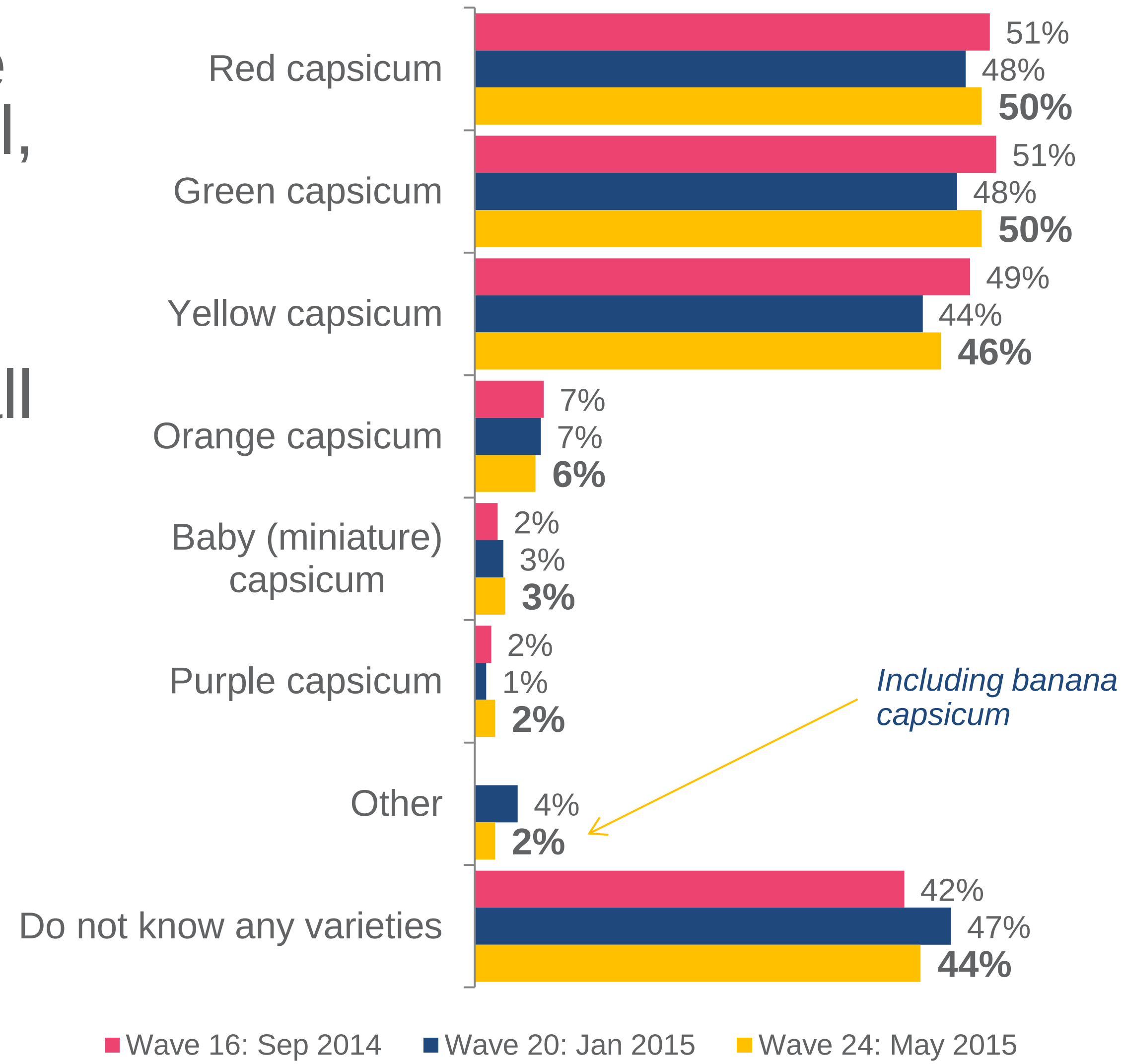


- The average price per kg was $5.65 in May 2015.
- There was some variation between states, with the highest price recorded in Perth and Melbourne ($7.98kg), with the cheapest price available at Coles in Melbourne ($3.50kg).
- The retailer price range remained at $4.48 per kilo.

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

Red, yellow and green coloured capsicums have the greatest level of recall, consistent with past months.

However, almost half of all consumers could not recall a type.



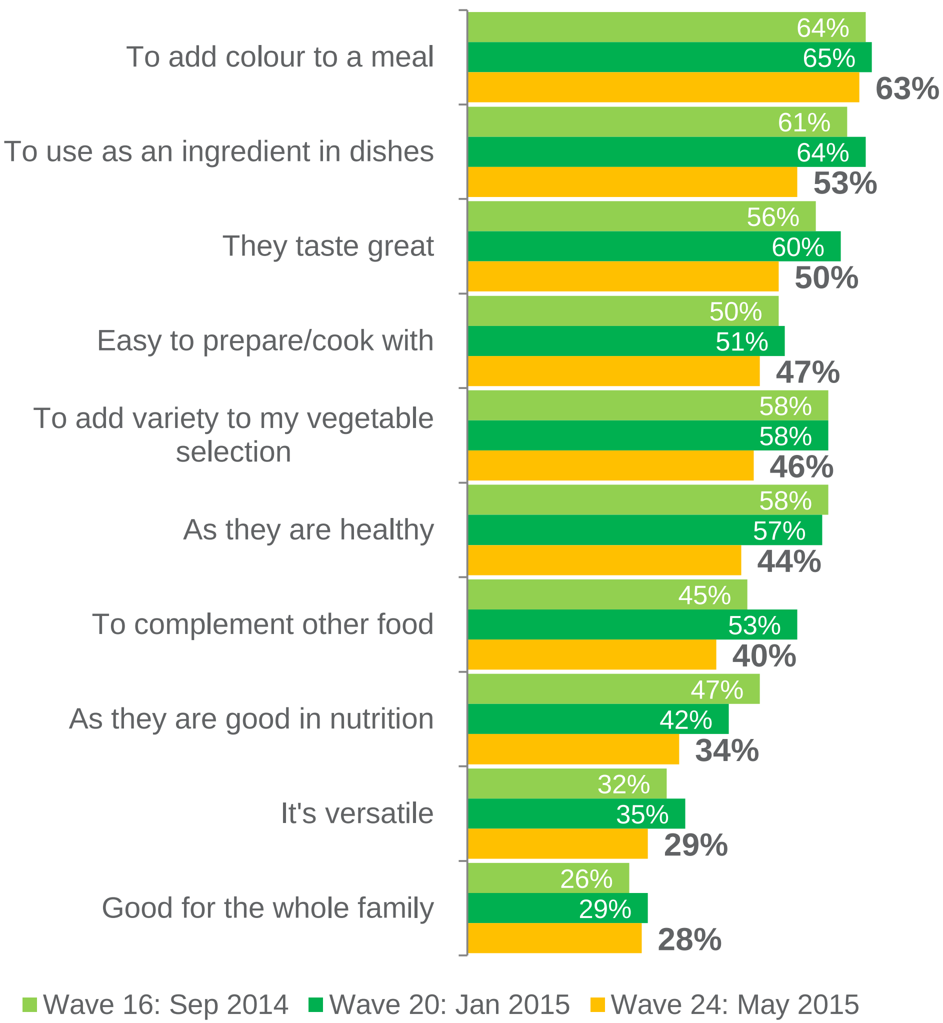
Q6a. What varieties of <commodity> are you aware of? (unprompted)
Sample Wave 16, N=309, Wave 20, N=353, Wave 24, N=307

Horticulture Innovation Australia

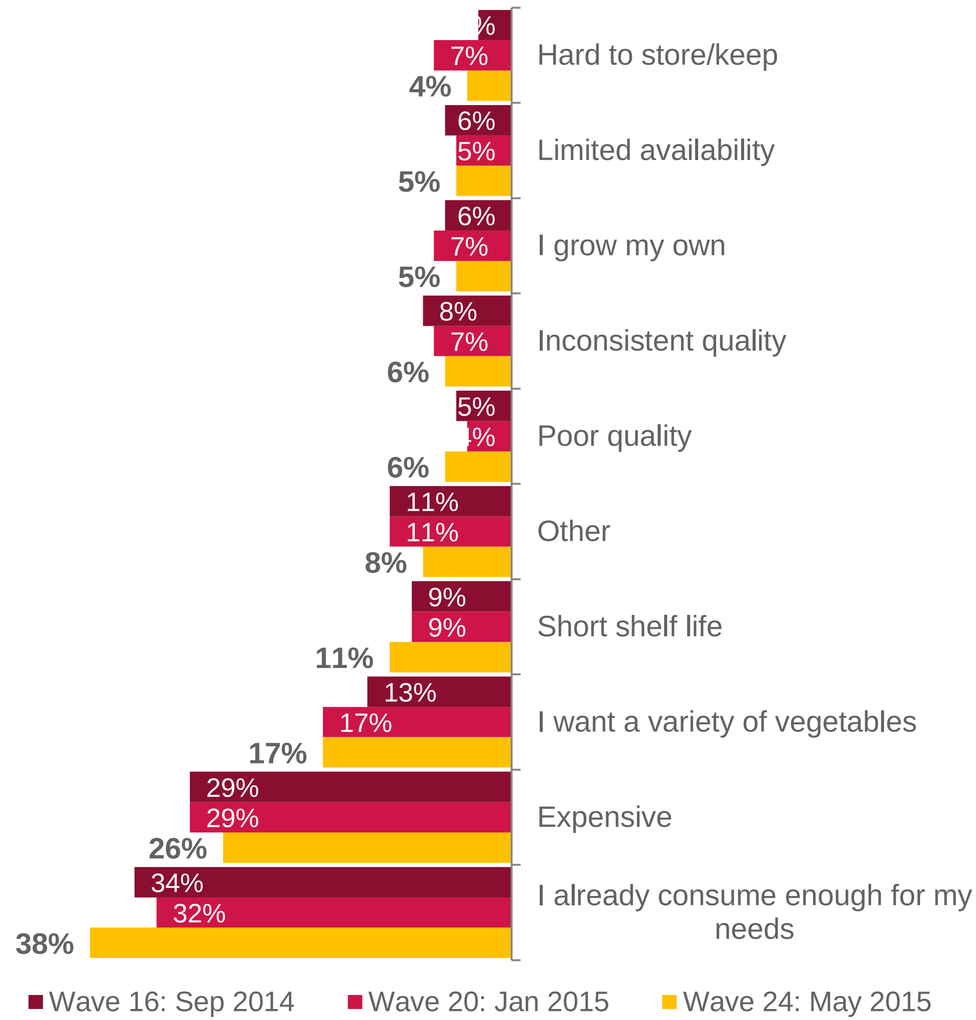
colmar brunton.

The key trigger to purchase was using capsicum to add colour to a meal. There was a decline in price as a barrier to purchase, with consuming enough vegetables remaining the clear reason why people don't buy capsicums more often.

Triggers



Barriers



Horticulture Innovation Australia

colmar brunton.

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 16, N=309, Wave 20, N=353, Wave 24, N=307

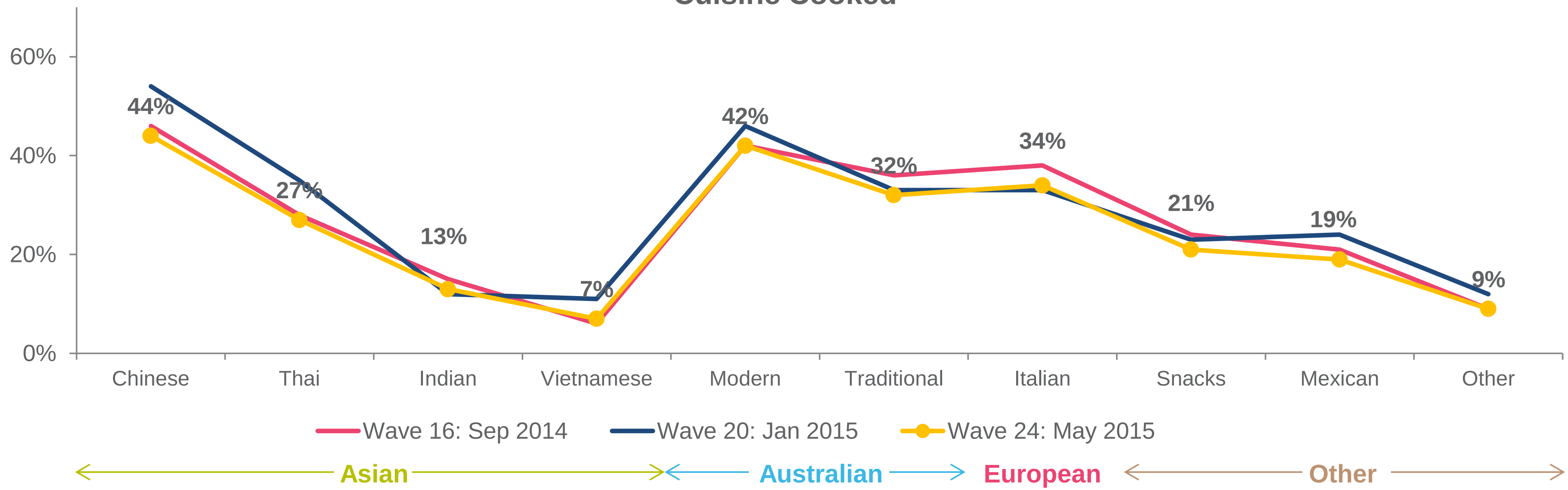
Capsicums are most frequently used in Asian and Australia cuisine, particularly Chinese and Modern Australian.

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

Top 5 Consumption Occasions

	Wave 24	Wave 20	Wave 16
Weekday Dinner	**54%**	56%	56%
Quick Meals	**36%**	41%	39%
Family meals	**37%**	39%	39%
Weekend Dinner	**39%**	38%	39%
Every-day	**28%**	31%	38%

Cuisine Cooked



Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?
Sample Wave 16, N=309, Wave 20, N=353, Wave 24, N=307

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

Capsicum is typically served with tomatoes and carrots, which has declined since the previous wave. Onion and lettuce has remained relatively consistent as an accompanying vegetable.

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

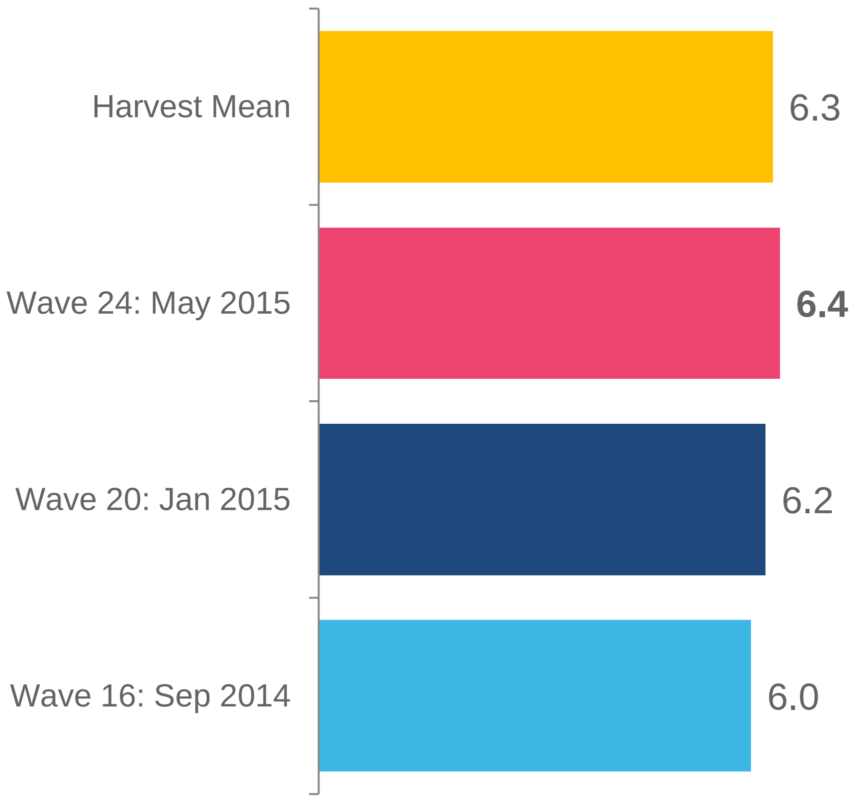
Accompanying Vegetables

Tomato	57%▼
Carrot	44%▼
Onion	42%▼
Lettuce	39%▼
Celery	28%▼

Top 10 Cooking Styles	Wave 16	Wave 20	Wave 24
Stir frying	71%	75%	69%
Raw	56%	56%	52%
Roasting	35%	25%	27%
Grilling	20%	17%	20%
Stewing	21%	18%	19%
Sautéing	21%	21%	19%
Baking	17%	15%	18%
Soup	12%	12%	17%
Shallow Frying	12%	12%	9%
Steaming	8%	10%	6%

Q9. How do you typically cook <commodity>?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
Sample Wave 16, N=309, Wave 20, N=353, Wave 24, N=307

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



AUSTRALIAN GROWN®

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

Q14. When purchasing <commodity>, how important is Provenance to you?
Mean scores out of 10.
Sample Wave 16, N=309, Wave 20, N=353, Wave 24, N=307

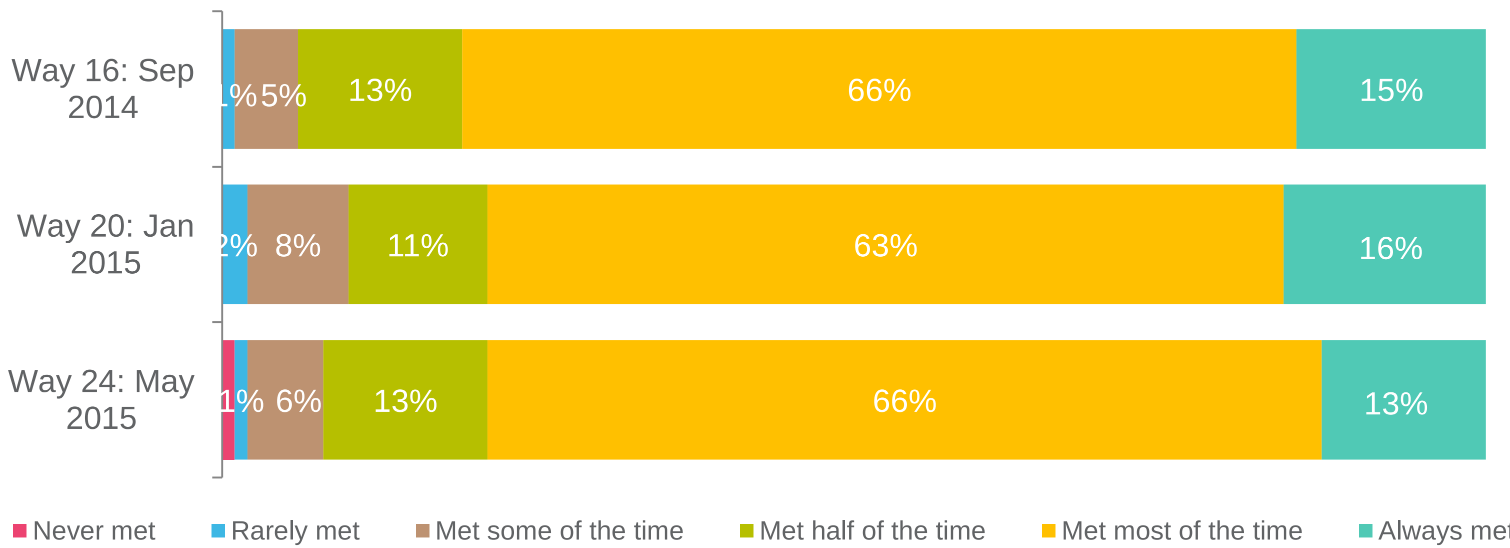
Horticulture Innovation Australia
colmar brunton.

Capsicums are expected to remain fresh for over eight days once purchased, in line with past months. Similarly, expectations of freshness are consistent with previous waves.

Expected to stay fresh for **8.4** days

▲ 8.5 days, Wave 16
▼ 8.2 days, Wave 20

Expectations Met



Q12. How long do you expect <commodity> to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy <commodity> ?
Sample Wave 16, N=309, Wave 20, N=353, Wave 24, N=307

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

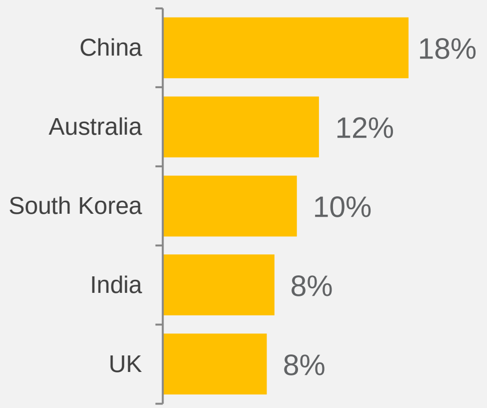
Trends: Capsicums

**Mintel search term was Capsicum*

Capsicum Global NPDs
March– May 2015

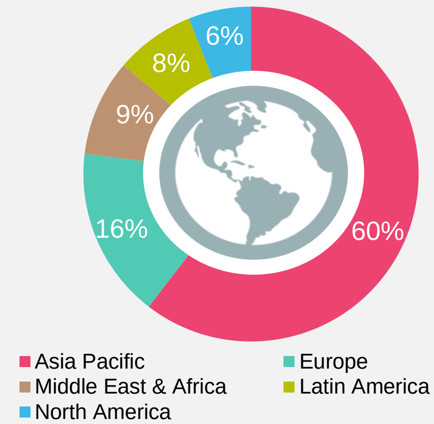
There were 182 products launched over the last three months that contained Capsicum as an ingredient. A large portion of these products were launched in Asia Pacific, specifically China, Australia, South Korea and India. New products were snacks, meals, sauces and processed products.

Country

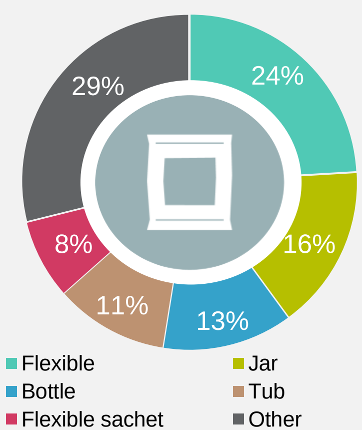


182 Global Launches

Region



Top Pack Formats



Categories

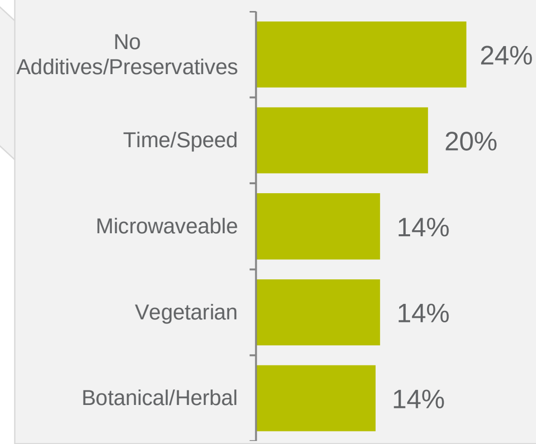
Meals 21%

Snacks 21%

Sauces 17%

Skincare 8%

Top Claims



Capsicum Product Launches:
L3M (March 2015 – May 2015)
Summary

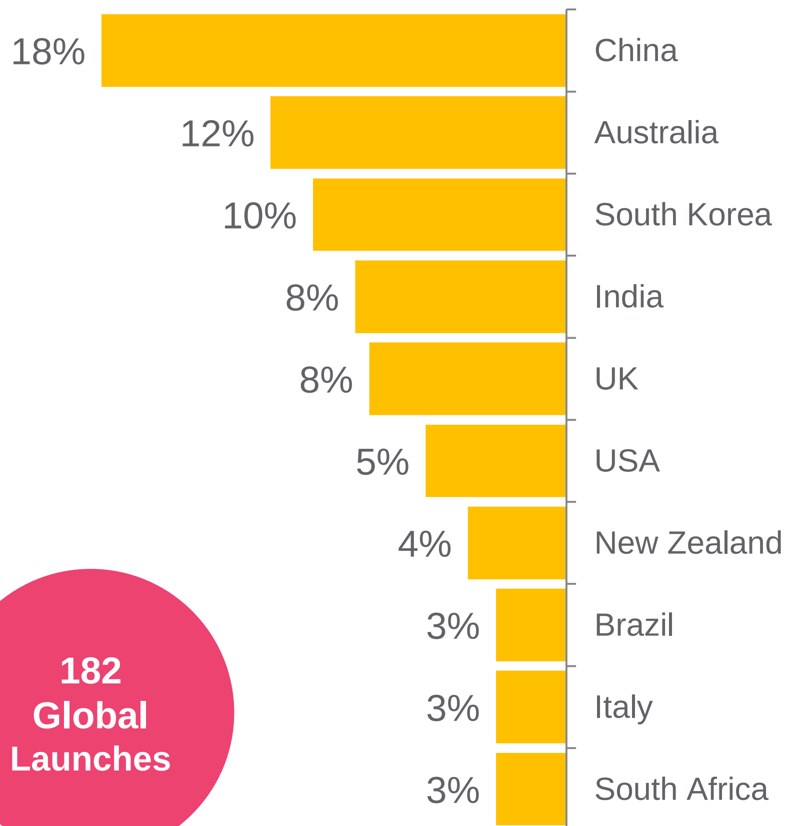
- There were 182 products launched globally in the last three months that contained capsicum as an ingredient.
- There were 21 products launched in Australia, a large decrease from the 31 launches in the previous wave.
- Top countries for launches were China (18%), Australia (12%), South Korea (10%) and India (8%), with nearly two thirds of products launched in the Asia Pacific region.
- Flexible pack format (24%) and jars (16%) were the most used packaging for products over the last three months.
- Meals (21%) and Snacks (21%) were the main launch category for products containing capsicum. Sauces and seasonings (17%) had a number of product launches, with Skincare product launches increasing from the previous wave (8%).
- Product claims used were no additives/preservatives (24%), time/speed (20%), microwaveable (14%) and vegetarian (14%).
- The most innovative product launches were Hot-Capsicum Patch in the USA for muscle and joint pain, and Roasted Capsicum and Garlic Wraps from New Zealand (examples of these can be found in the following pages).

Source: Mintel (2015)

Country & Categories Launches

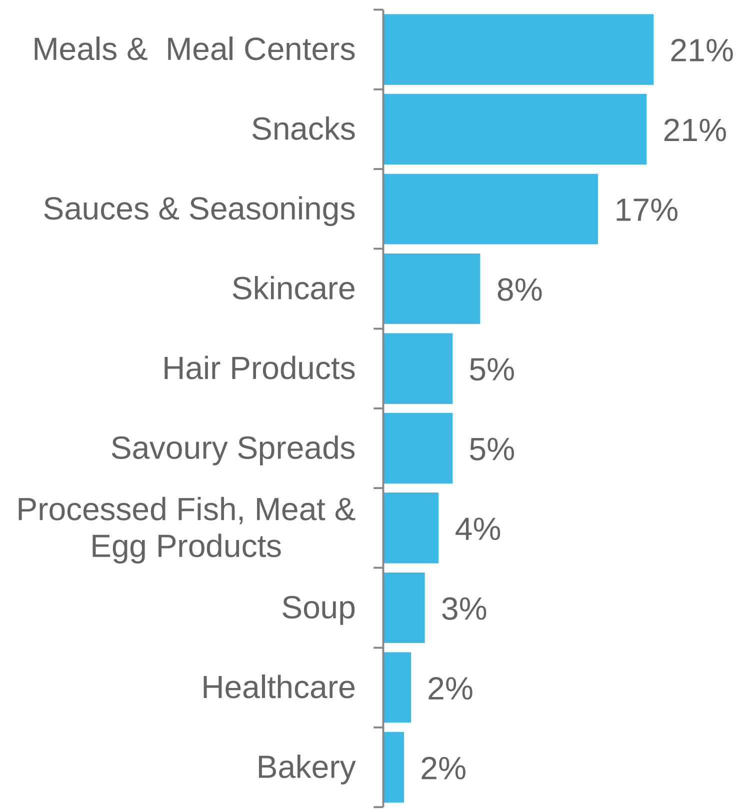
- China had the greatest number of capsicum product launches over the last 3 months, overtaking Australia. South Korea and India also had a number of launches.
- Meals and snacks were the main product categories, similar to previous trends.

Top Launch Countries



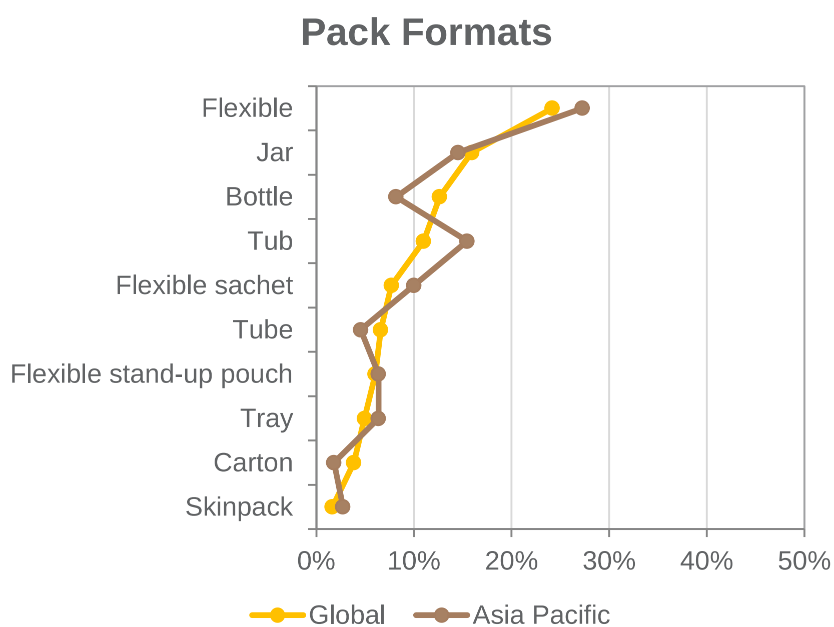
182 Global Launches

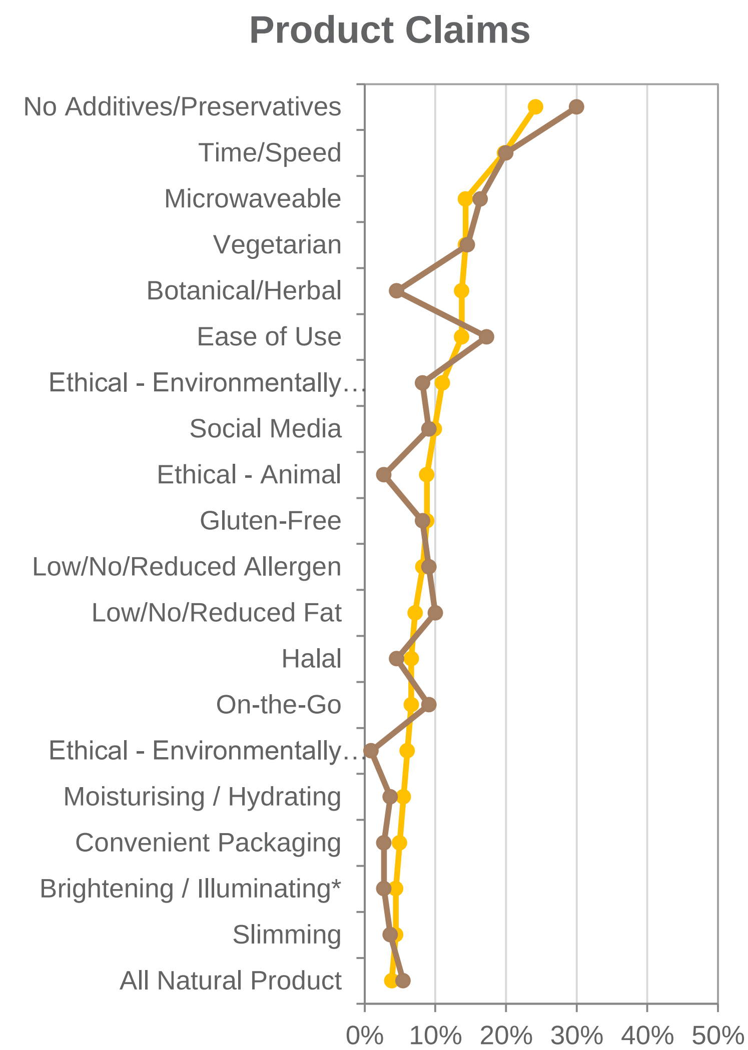
Top Launch Categories



Claims and Packaging Used

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





Only regions with n >30 are displayed

Global N=165 Asia Pacific N=105

Innovative Capsicum Launches:
L3M (March – May 2015)

Hisamitsu Salonpas-Hot Capsicum Patch (USA)

Hisamitsu Salonpas-Hot Capsicum Patch has been repackaged in a newly designed 1-ct pack measuring 5.12in. x 7.09in. The topical analgesic product is designed for temporary relief of minor aches and pains of muscles and joints associated with simple backache, arthritis, strains, bruises, and sprains.

Claims:
Other (Functional)

Tilda Roasted Vegetable Wholegrain Brown Basmati Rice (UK)

Tilda Roasted Vegetable Wholegrain Brown Basmati Rice is described as delicious and nutty roasted vegetables with a delicate hint of herbs, beautifully complements the natural goodness of wholegrain basmati rice. This rice is free from artificial colours, preservatives, flavours, and gluten. The product is suitable for vegetarians, and can be simply prepared in the microwave in two minutes. It retails in a 250g pack.

Claims:
No Additives/Preservatives, Low/No/Reduced Allergen, Microwaveable, Gluten-Free, Vegetarian, Wholegrain

Marks & Spencer Spiced Chilli Seasoning on Red Pepper Pitta Chips (UK)

Marks & Spencer Spiced Chilli Seasoning on Red Pepper Pitta Chips are suitable for vegetarians. The product retails in a 150g pack.

Claims:
Vegetarian

Kewpie Spicy Black Pepper Sandwich Spread (Malaysia)

Kewpie Sapuan Sandwic Rasa Pedas Lada Hitam (Spicy Black Pepper Sandwich Spread) is halal certified and only needs spreading on the bread. This ready to eat product retails in a 310ml pack bearing the HACCP logo.

Claims:
Halal, Ease of Use

Source: Mintel (2015)

Innovative Capsicum Launches:
L3M (March– May 2015)

Better You Fitness Capsules (Sweden)

Better You Fitness Kapslar (Fitness Capsules) are now available with a new updated formula. This product features a high caffeine content, is developed for fat metabolism, and contains iodine which contributes to normal metabolism. It retails in a pack containing 60 vegetable capsules and features the Facebook logo.

Claims:
Energy (Functional), Slimming, Social Media

Shahsavand Genus Capsicum (Iran)

Shahsavand Genus Capsicum is halal certified. This product retails in a 75g jar.

Claims:
Halal

Calé Green Olives Stuffed with Peppers (Peru)

Calé Aceitunas Verdes Rellenas con Pimiento (Green Olives Stuffed with Peppers) are now available. These olives are ideal as a snack or appetizer and have been kosher certified. This product retails in a 240g pack.

Claims:
Kosher

Inka Crops Inka Corn Spicy Chili Flavoured Giant Corn (Columbia)

Inka Crops Inka Corn Maíz Gigante Chile Picante (Spicy Chili Flavoured Giant Corn) is now available. This kosher and HACCP certified product retails in a 100g pack.

Claims:
Kosher

Source: Mintel (2015)

Innovative Capsicum Launches:
L3M (March– May 2015)

RoyQual Standard Foods Chicken Bar-B-Q Pizza (Pakistan)

RoyQual Standard Foods Chicken Bar-B-Q Pizza is a fully baked pizza. The heat and eat product is halal certified and can be ready in two to four minutes. It retails in pack containing one large pizza.

Claims:
Halal, Ease of Use

Seojeongok's Slow Kitchen Beef Jerky (South Korea)

Seojeongok's Slow Kitchen Beef Jerky is made from low-fat beef from New Zealand. This product can be grilled after seasoning with sesame oil for a better taste. It is said to be the king of jerky and retails in a 170g pack bearing the HACCP logo.

Claims:
Low/No/Reduced Fat

Haldiram's Nagpur Paneer Cutlet (India)

Haldiram's Nagpur Paneer Cutlet is described as a snack made from cottage cheese and green peas. The mild spice vegetarian product is 100% natural and free from preservatives, trans fat or artificial colours. It can be thawed in the microwave and retails in a recyclable 420g pack containing eight units.

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

Freya's Roasted Capsicum and Garlic Wraps (New Zealand)

Freya's Roasted Capsicum and Garlic Wraps are said to be perfect for breakfast, lunch, dinner or just a snack and can simply be filled with the customer's favourite filling. This soft, flexible, easy-to-roll and microwavable product is free from yeast and retails in a resealable pack containing six units.

Claims:
Ease of Use, Convenient Packaging, Low/No/Reduced Allergen, Microwaveable

Source: Mintel (2015)

Australian Innovative Launches:

L3M (March – May 2015)

Optislim Healthy Option Meal Vegetarian Tikka Masala

Anathoth Farm Sweet Chilli Relish

Heinz Soup of the Day 7 Veg with Garden Herbs Soup

Imperial Grain Mexican Flavoured White Rice Cups

McCain Healthy Choice Thai Red Curry with Beef, Vegetables & Rice

Woolworths Homebrand Mild Taco Sauce

Raw Materials Roast Vegetable Chilli Pasta Sauce

The Salad Servers Chickpeas with Roast Pumpkin Salad

Source: Mintel (2015)

In the Media.

Vegetable Trends

The foodpeople have predicted the trend setting cuisines and ingredients of the 2015-2016. They use social media, gourmet magazines, upscale news printed media, women's magazines and mass market media channels.

They have predicted that new colour varieties of vegetables will be popular as well as pickled vegetables.

Key Vegetables:

- Kale
- Fennel
- Sweetpotato
- Beets
- Sea veg & weeds
- Cauliflower
- Kohlrabi
- Black garlic
- Chard
- Chicory
- Radish
- Daikon

Commodity News
(March – May 2015)

- Baby bok choy is the immature version of bok choy, harvested earlier than the full grown variety.
- The flavour is described as milder than bok choy, slightly nutty and a little bit bitter. Baby bok choy is recommended if eating raw.
- Suggested uses are stir fry, soup and salad.

www.host.madison.com/lifestyles/food-and-cooking/

- Labelled the new 'superfood' in the UK by food writers and celebrity chefs. The newfound popularity of beetroot is expected to push sales above £1 million a week. Popularity is due to its health benefits, which is seeing the vegetable being added to soups, salads, chips and drinks.

http://www.dailymail.co.uk/health/

- Papua New Guinea is the largest consumer of sweetpotato per person. The average citizen eats 500kg of sweetpotato per year.
- The use of sweetpotato has increasingly been seen on menus in New York, London and more locally in Melbourne and Sydney.

The Foodpeople

- A study published in the Natural Products Research found that yellow and red capsicums can bring down the speed of digestions of carbohydrates and lipids. This effect may help reduce the onset of diabetes and obesity.

http://www.newseveryday.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 contracted to conduct a monthly online tracking project following specified vegetables across a three year period; monthly trend analysis; and additional ad-hoc projects to assist in this understanding of consumers.

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

This wave's report (Wave 24, May 2015) focuses on:

- Asian Vegetables
- Beetroot
- Capsicums
- Sweetpotatoes

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 12 months.

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

Horticulture Innovation Australia

colmar brunton.

Online Methodology.

- Respondents were recruited via an Online Panel. If the respondents met the recruitment requirements of sufficient vegetable consumption (monthly) they were asked to complete the online questionnaire.
- All respondents completed general demographic and consumption questions. If respondents purchased any of the specific commodities within the last month they would complete those questions. A minimum of N=500 respondents completed the questionnaire.
- Topics covered in the questionnaire were vegetable purchase and consumption, category health, price and value perceptions, triggers and barriers to purchase and preparation and cooking preferences.
- An additional 2 ad-hoc questions are asked at the end of the questionnaire. The subjects of these questions are supplied by Horticulture Innovation Australia prior to each month to get feedback on topics of interest at that time.
- The questionnaire took 15 minutes to complete.
- Questions asked appear on the bottom of each page of this report. Unless stated otherwise, all scales were 0 - 10 scales, with higher scores indicating greater agreement/liking/importance etc.

Sample.

In total, 668 respondents completed the questionnaire. Respondents represented most states and territories, as well as both metro and rural areas.

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

To qualify for the questionnaire, respondents...

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

	Total N=668	Asian Vegetables n=311	Beetroot n=259	Capsicum n=307	Sweet-potatoes n=307
Gender					
Male	31%	30%	33%	30%	29%
Female	69%	70%	67%	70%	71%
Age					
18-24 y.o.	6%	7%	7%	7%	6%
25-34 y.o.	20%	23%	18%	20%	22%
35-44 y.o.	21%	23%	18%	22%	23%
45-54 y.o.	19%	16%	21%	19%	20%
55-64 y.o.	17%	17%	19%	13%	14%
65+ y.o.	16%	14%	17%	19%	16%
Household					
Single Income no Kids	17%	19%	14%	17%	19%
Double Income no Kids	21%	24%	22%	20%	19%
Young Families	18%	18%	19%	19%	19%
Established Families	23%	24%	24%	24%	22%
Empty Nesters	20%	16%	22%	21%	21%
Location					
New South Wales	22%	25%	23%	18%	21%
Victoria	22%	25%	27%	18%	17%
South Australia	13%	13%	12%	17%	16%
Queensland	21%	19%	19%	21%	23%
Western Australia	15%	14%	13%	18%	18%
Tasmania	4%	3%	4%	5%	4%
Australian Capital Territory	1%	1%	2%	2%	1%

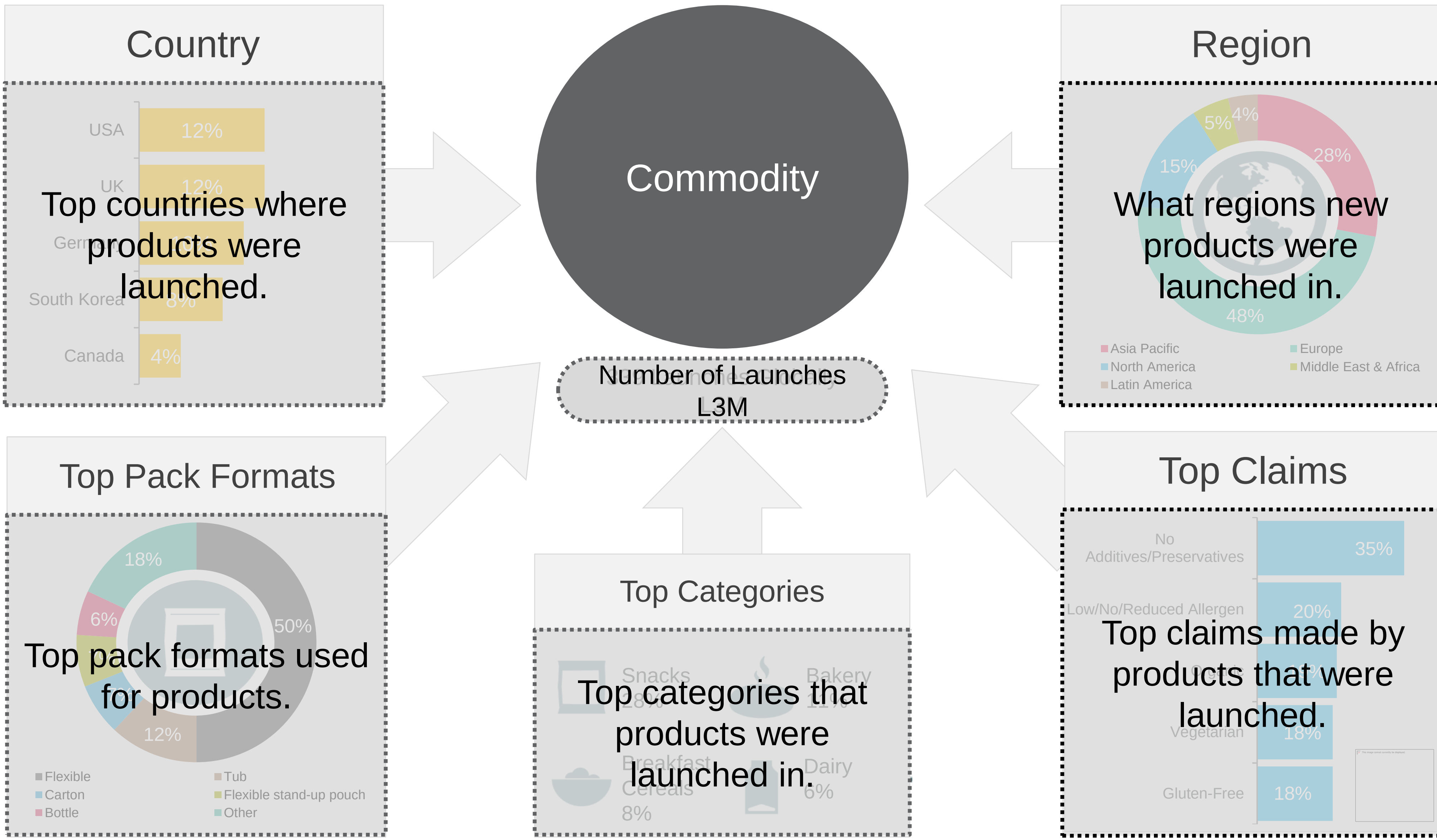
**Please note the lower number of beetroot consumers is due to low incidence of purchase in the last month*

Trends Research: Our Approach

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

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

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



Thanks.