Project Harvest Monthly Tracker Report.

Wave 25, May 2015

Vegetables tracked: Pumpkin, Carrots, Cauliflower, Beans, Baby Broccoli, Parsley & Silverbeet

This project has been funded by Horticulture Innovation Australia using the vegetable levy and funds from the Australian Government.

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Horticulture Innovation Australia

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Wave 25:
Executive Summary

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Following a number of high profile food safety scares we have observes a sharp increase in the importance of knowing where our food comes from , but what component of that is knowing our food is Australian? And where does that rank in importance compared to factors such as price, taste and brand?

In terms of quality, a recent survey of Australian shoppers* shows Australian produce is top ranked (72%), followed by New Zealand (44%), UK (34%), Italy (33%) and the United States (29%). Lower quality perceptions are associated with goods from South Africa (9%), Indonesia (4%), China (4%), Thailand (3%) and Vietnam (3%). These results re-iterate how important county of origin labelling is for Australian grown produce.

*Colmar Brunton's Shopper Pulse; Retail World, June 22, 2015
**HAL Report, VG12045 Understanding Attributes that Inhibit the Purchase and Consumption of Vegetables, 2013

Industry Insight cont.

With regard to what drives purchase, it is critical to acknowledge that what motivates us can be based on the type of food we are considering. For food in general, the same survey of Australian shoppers* suggests that Price is the most important factor of choice (37%), followed by Taste (17%), Australian Made (15%) and other incidental factors such as Environmental Impact (2%) and Packaging (2%). However, previous findings specific to vegetables suggest that local produce is more than twice as important than any price promotion illustrating that 'Australian made' in this context has a distinct role in guaranteeing quality, freshness and food safety above and beyond packaged goods.

All-in-all, Australian-grown can be more important than just provenance and more important than price - a great motivation to ensure country of origin features predominantly on Australian produce at point of sale.

*Colmar Brunton's Shopper Pulse; Retail World, June 22, 2015

**HAL Report, VG12045 Understanding Attributes that Inhibit the Purchase and Consumption of Vegetables, 2013

Fast Facts

Beans:

- Beans had a strong level of endorsement and recommendation to family and friends. Increased future purchase intent was also higher than the average of the vegetables tracked thus far.
- Beans are purchased around 4 times per month and are consumed 9 times per month, both higher in comparison to previous waves.
- Consumers purchase 660g of beans per shop. Recalled last spend is $3.50. Overall, consumers perceive beans to be good value for money.
- National price tracking indicated the average price for green beans in June was $5.31 per kg, which ranged quite widely between state and retailers.
- Awareness of bean types have increased for most varieties this wave, but overall is still very low. Broad remained the most recalled type of Bean, followed by Runner and Green.
- Beans are expected to stay fresh for just over a week, and freshness expectations are met most of the time.
- Health and ease of preparing are the main influences on purchase of beans. Not wanting to waste any and consuming enough for their needs are primary barriers to purchase.

Carrots:

- Importance of carrots was low this month, however consumers are satisfied with the range available. Future purchase of carrots looks to remain stable.
- Carrot is purchased approximately 4 times per month. Consumption of carrot occurs 14 occasions per month, nearly once every second day.
- On average, consumers purchase 1.2kg of carrot. Recalled last spend was $2.30. Overall, consumers perceived very good value for money.
- National price tracking indicated the average price for carrots in June was $2.38 per kg, which was quite consistent between state and retailers.
- Awareness of carrot types remains low, with over one half of consumers unable to recall a type of carrot. Colour is the main trigger for unprompted carrot variety awareness
- Carrots are expected to remain fresh for over 12 days. Freshness expectations have increased and are generally met by consumers.
- Health and ease of preparing are the key triggers to purchase, with the former substantially increasing since the last wave. The main barriers to future purchase are consuming enough and not wanting to waste any.

Fast Facts

Cauliflower:

- Cauliflower holds very low importance to consumers and there is little interest in new varieties. The majority of consumers indicate that their purchase of cauliflower will remain stable in the future.
- Purchase of cauliflower occurs 3 times per month and is consumed over 8 times per month. Purchase is typically from mainstream retailers.
- Overall, cauliflower is perceived to be fair value for money (6.0/10). Consumers on average purchase 1.0kg, with recalled last spend at $3.50.
- Price tracking for June 2015 revealed an average price of $4.57 each, with the cheapest price found in Hobart at $2.00 each.
- Spontaneous recall remains very low for cauliflower, however consumers were slightly more aware of white and purple varieties this wave.
- Health, taste and ease of preparation are the strongest triggers to purchase, while price and already consuming enough for their needs are the two biggest barriers.
- Consumers expect cauliflower to remain fresh for nine days, with expectations of freshness largely met.

Pumpkin:

- Consumers are satisfied with the range of pumpkin available and overall has high levels of consumer sentiment.
- Purchase and consumption frequency of pumpkin both increased, with approximately 9 consumption occasions per month. Purchase is mainly from Coles, Woolworths and specialist retailers.
- Consumers on average are purchasing 1.4kg of pumpkin. Recalled last spend is $3.20, which is perceived as good value for money (7.2/10).
- Price tracking revealed a national average of $2.60 per kilogram for butternut pumpkins.
- Awareness of pumpkin remains high, with positive recall across multiple types of pumpkin. Awareness of Queensland Blue and Jap pumpkin has steadily increased across waves.
- Taste and health are the key influences to purchase, both increasing considerably since the previous wave. Barriers to purchase include consuming enough for their needs and not wanting to waste any.
- Consumers expect pumpkin to remain fresh for over 12 days once purchased, expectations are in line with previous waves and are generally met.

Fast Facts

Baby Broccoli:

- Having a range of baby broccoli available is very important to consumers. There is also a high level of endorsement, with consumers recommending to family and friends.
- Purchase of baby broccoli occurs nearly 4 times per month and is consumed 7 times per month. Purchase is typically from mainstream retailers.
- Overall, baby broccoli is perceived to be moderate value for money (6.1/10). Consumers on average purchase 0.6kg, typically bunched. Recalled last spend is $3.60.
- Price tracking revealed an average price of $2.82 per bunch.
- 84% of consumers were unaware of any varieties of baby broccoli.
- Health, ease of preparation and taste are the strongest triggers to purchase, while wanting variety in vegetables and price are the two biggest barriers.
- Consumers expectations of freshness are largely met.

Silverbeet:

- Consumers are satisfied with silverbeet. One fifth of consumers indicated that they will purchase more in the future.
- Purchase of silverbeet occurs nearly 4 times per month and is consumed 8 times per month. Purchase is typically from mainstream retailers and also specialist retailers.
- Consumers on average are purchasing 700g of silverbeet. Recalled last spend is $3.30, which is perceived as good value for money.
- Price tracking for June 2015 showed the national average as $4.05 per bunch for silverbeet.
- Spontaneous awareness for silverbeet is low, with the highest recall for rainbow/ coloured/swiss silverbeet.
- Health and ease of preparation are the key influences to purchase. Barriers to purchase included consuming enough for their needs and wanting a variety of vegetables.
- Consumers expect silverbeet to remain fresh for just under a week once purchased, and these expectations are generally met.

Fast Facts

Parsley:

- Parsley has strong levels of consumer sentiment across all metrics of importance, satisfaction, endorsement and interest in new varieties.
- Purchase of parsley occurs approximately 4 times per month and is consumed 11 times per month. Purchase is typically from mainstream retailers.
- Overall, parsley is perceived to be fair value for money (5.7/10). Consumers on average purchase 0.2kg, typically per bunch. Recalled last spend is $3.10.
- Price tracking revealed an average price of $2.90 per bunch.
- Spontaneous awareness of Parsley remains relatively high, with most consumers able to recall Flat Leaf/ Italian/Continental Parsley and Curly Leaf Parsley.
- Using as an ingredient in dishes, complementing other food and adding colour to meals are the strongest triggers to purchase, while not wanting to waste any and growing their own are the two biggest barriers.
- Consumers expect parsley to remain fresh for just over a week. Expectations of freshness are largely met.

Beans Grower Action Plan

9 times per month

is the average number of times Australians are consuming beans – which is on the increase during winter.

1.

Insight:

Purchase frequency and consumption of beans have both increased in line with the winter months and beans are most often served with carrots and potatoes.

Recommendation:

Offer recipe cards for winter meals which incorporate beans, carrots and potatoes. Pursue packaging opportunities for winter veggies incorporating beans to meet increased consumption needs.

2.

Insight:

With increased consumption there has been an increase in awareness of bean types. Broad, runner and green varieties had the greatest level of recall.

Recommendation:

Communicate the benefits, flavour and textural profiles of key bean types. At point of sale highlight recipe ideas for specific bean types.

3.

Insight:

Triggers to purchasing beans have increased with health and ease of preparation the primary motivations.

. Recommendation:

Opportunity to target Conscious Improvers with specific health/nutritional information about beans to encourage greater purchase. Highlight ease of preparation in recipe cards and at point of sale.

Carrot Grower Action Plan

Carrots are perceived to be very good value for money.

1.

Insight:

There has been a large increase in carrot purchase from mainstream retailers, Coles and Woolworths, possibly driven by $1 per bag promotions this month.

Recommendation:

Consider pricing strategy with specialist and independent retailers during these times to retain volume of purchase and balance of channel distribution.

2.

Insight:

Carrots are typically served with potatoes, broccoli and onion in cooler months. Consumers cook carrots in a variety of ways, including roasting, stir frying, and boiling.

Recommendation:

Pursue ‘roast veggie’ packaging opportunities for carrots, broccoli, potatoes and onion to meet increased needs. Consider more julienne carrots ready to stir fry to better meet needs.

3.

Insight:

Small bags of carrots remain the primary format purchased, however individual carrot purchases have dramatically increased this month as consumers are not wanting to waste their carrots.

Recommendation:

Communicate optimal storage methods for carrots to extend freshness and support increased purchase and consumption.

Cauliflower Grower Action Plan

$4.57 each

is the average price of cauliflower in Australia this month.

1.

Insight:

Triggers to purchasing cauliflower have increased with health and taste the primary influences on purchase.

Recommendation:

Target Conscious Improvers with specific health and nutritional benefits of cauliflower to increase consumption and purchase frequency.

2.

Insight:

Expense is the main barrier to purchase and value for money is considered low.

Recommendation:

Educate consumers on the versatility of cauliflower and the different cuisines and cooking styles cauliflower is suitable for.

3.

Insight:

There has been an increase in cooking with cauliflower in soup moving into the winter months.

Recommendation:

Consider including cauliflower in soup packs for increased convenience and to encourage further consumption.

Pumpkin Grower Action Plan

1.4kg is the average weight of pumpkin purchase.

1.

Insight:

Awareness of Queensland Blue and Jap pumpkin have steadily increased over the year.

Recommendation:

Educate consumers on the different types of pumpkin, their distinct flavour profiles and the most suitable cooking cuisines.

2.

Insight:

Value for money perceptions have increased this month with taste and health the key triggers to purchase.

Recommendation:

Communicate use of seeds in addition to flesh to encourage greater value for money perceptions and health benefits of pumpkin.

3.

Insight:

There were 26 pumpkin launches in Australia this quarter with soups and soup mixes prominent products.

Recommendation:

Consider calling out specific pumpkin varieties used in soups and new product launches to further promote pumpkin types.

Baby Broccoli Grower Action Plan

48% of consumers cook baby broccoli in Chinese cuisines.

1.

Insight:

Baby broccoli is not perceived as strong value for money with expense a key barrier to future purchase.

Recommendation:

Educate consumers on the versatility of baby broccoli outside of stir fry and Chinese cooking styles to improve value for money perceptions.

2.

Insight:

Consumers expect baby broccoli to last only a few days once purchased. Short shelf life is also a negative influence on purchase.

Recommendation:

Communicate storage instructions to consumers to ensure freshness and increase consumer satisfaction.

3.

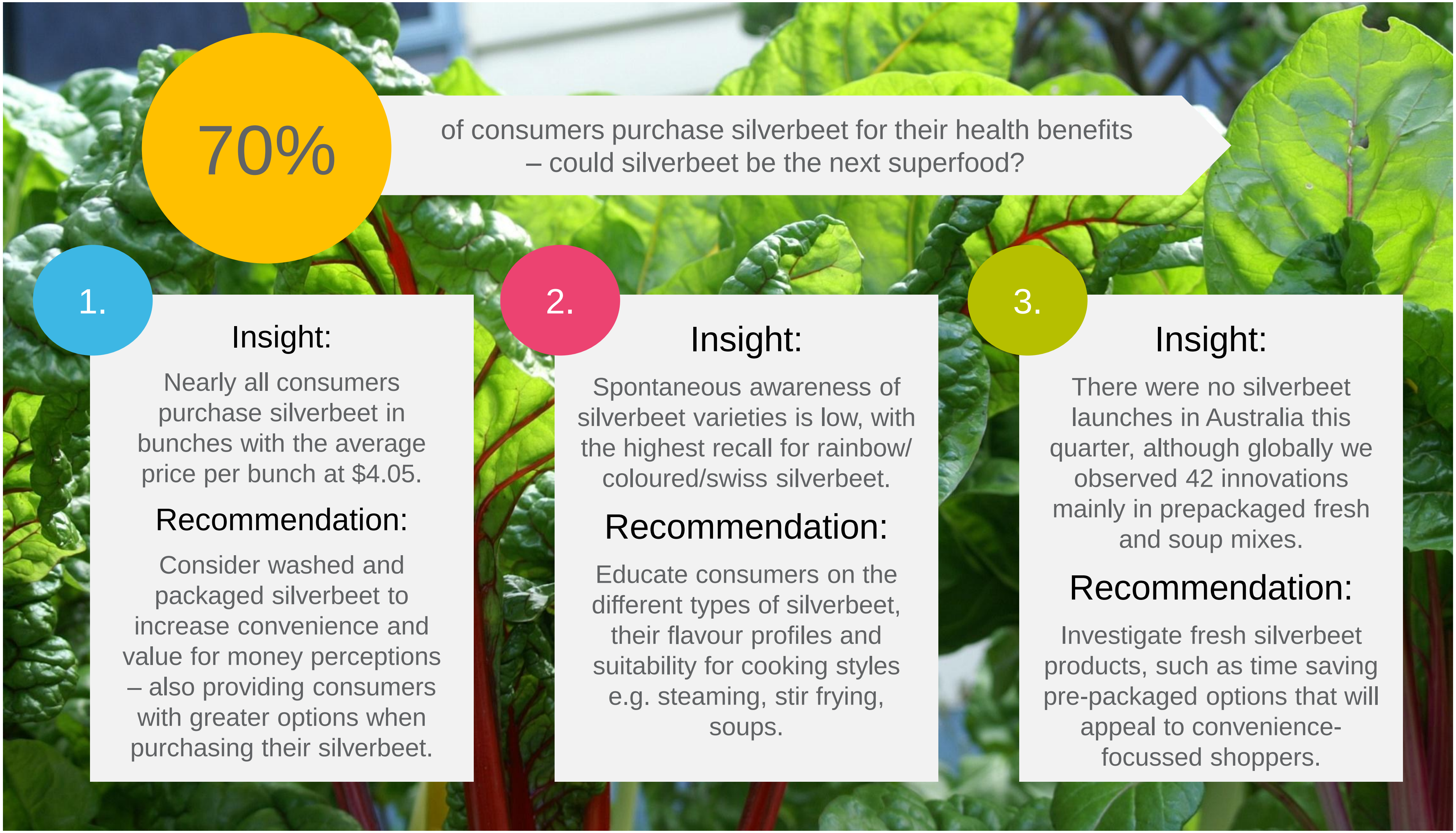
Insight:

Baby broccoli has strong levels of endorsement and recommendation to family and friends, however there has been no NPD or global product launches including baby broccoli in the last few months.

Recommendation:

Develop an innovation pipeline for baby broccoli such as stir fry mixes, soups, mixed vegetable steaming trays and frozen options.

Silverbeet Grower Action Plan



70% of consumers purchase silverbeet for their health benefits – could silverbeet be the next superfood?

1.

Insight:

Nearly all consumers purchase silverbeet in bunches with the average price per bunch at $4.05.

Recommendation:

Consider washed and packaged silverbeet to increase convenience and value for money perceptions – also providing consumers with greater options when purchasing their silverbeet.

2.

Insight:

Spontaneous awareness of silverbeet varieties is low, with the highest recall for rainbow/ coloured/swiss silverbeet.

Recommendation:

Educate consumers on the different types of silverbeet, their flavour profiles and suitability for cooking styles e.g. steaming, stir frying, soups.

3.

Insight:

There were no silverbeet launches in Australia this quarter, although globally we observed 42 innovations mainly in prepackaged fresh and soup mixes.

Recommendation:

Investigate fresh silverbeet products, such as time saving pre-packaged options that will appeal to convenience-focussed shoppers.

Parsley Grower Action Plan

Over **2000** products containing parsley as an ingredient were launched globally in the last 3 months.

1.

Insight:

Italian and Modern Australian cuisine are popular for parsley dishes.

Recommendation:

Consider fresh cuisine herb packs such as Italian Inspired: parsley, oregano and basil, to assist consumers to cook Italian cuisine.

2.

Insight:

The average price for Parsley in Australia is $2.90 per bunch and consumers do not perceive parsley to be strong value for money.

Recommendation:

Investigate alternative packaging options such as pre-chopped garnish packs to provide alternative pricing and product options for consumers.

3.

Insight:

Short shelf life and consumers not wanting to waste their parsley are key barriers to future purchase.

Recommendation:

Investigate alternative storage options (outside of plastic sleeves and plastic containers) as these are not enhancing the perceived shelf life of parsley.

Wave 25:
Response to Ad hoc Questions

Consumers have a greater willingness to spend more on Australian grown vegetables, compared with organic and imported vegetables. In contrast, consumers are unwilling to spend more on imported vegetables.

Australian grown vegetables

Mean Willingness 6.6

Largely representative of Australian population across all demographics.

Organic vegetables

Mean Willingness 4.3

More likely to be between the ages of 18-29 and 30-39, Double Income and No Kids (DINKS) and less likely to be from QLD.

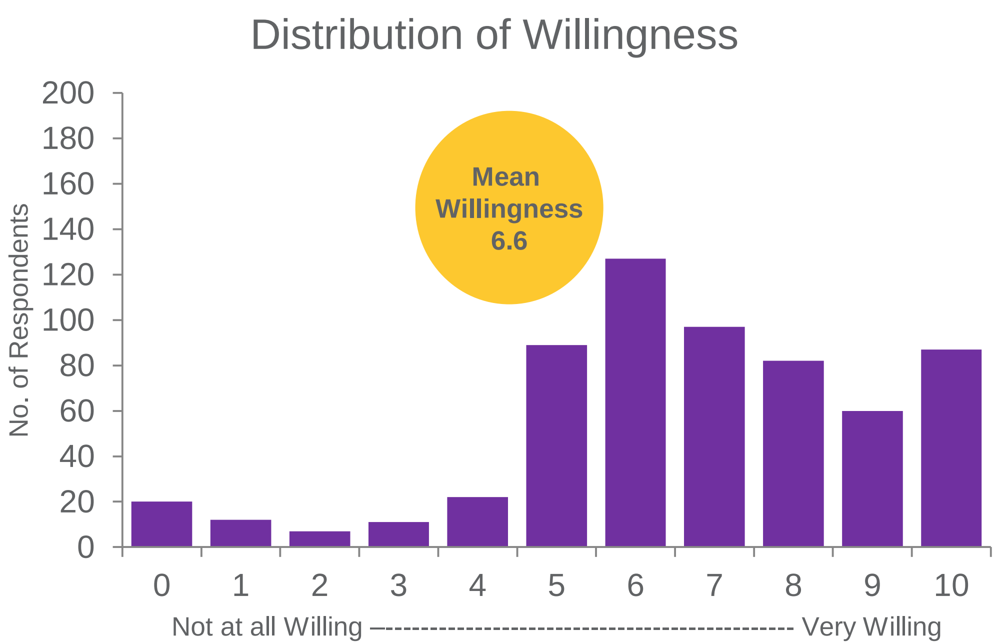
Imported vegetables

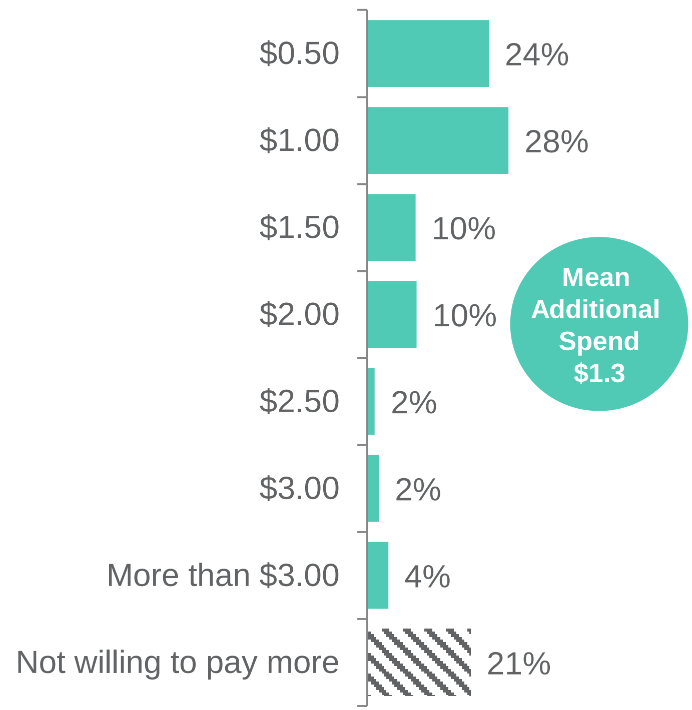
Mean Willingness 1.8

More likely to be from NSW and QLD, aged 18-29 and Young Families.

Willingness to Pay More. Australian grown vegetables.

The greatest willingness to pay more is for Australian grown vegetables.
Of those consumers who are willing to pay more for Australian grown vegetables, between $0.50 and $1.50 more than regular is considered reasonable.

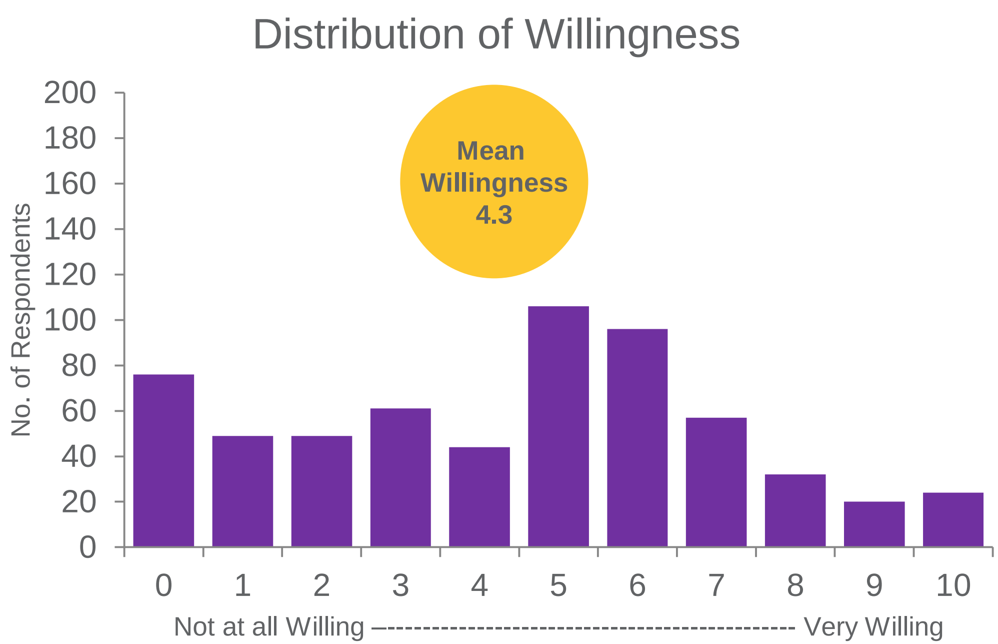


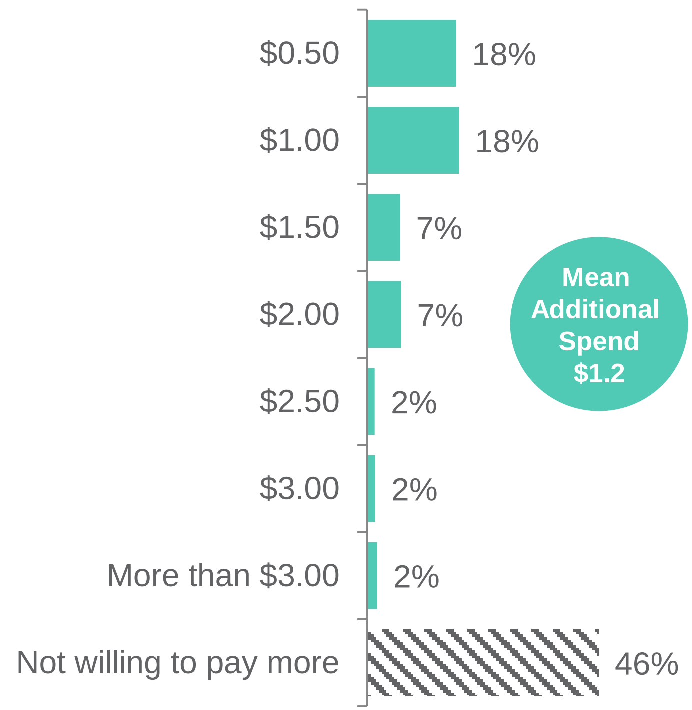


Thinking about your typical fresh vegetable shop, how willing would you be to pay MORE for Australian grown vegetables, compared to your regular vegetables?
Base: n=614

Willingness to Pay More. Organic vegetables.

Willingness to pay more for organic vegetables was moderate; lower than Australian grown vegetables but higher than Imported vegetables.
Of those consumers who were willing to pay more for organic vegetables, between $0.50 and $1.50 more than regular was considered reasonable.

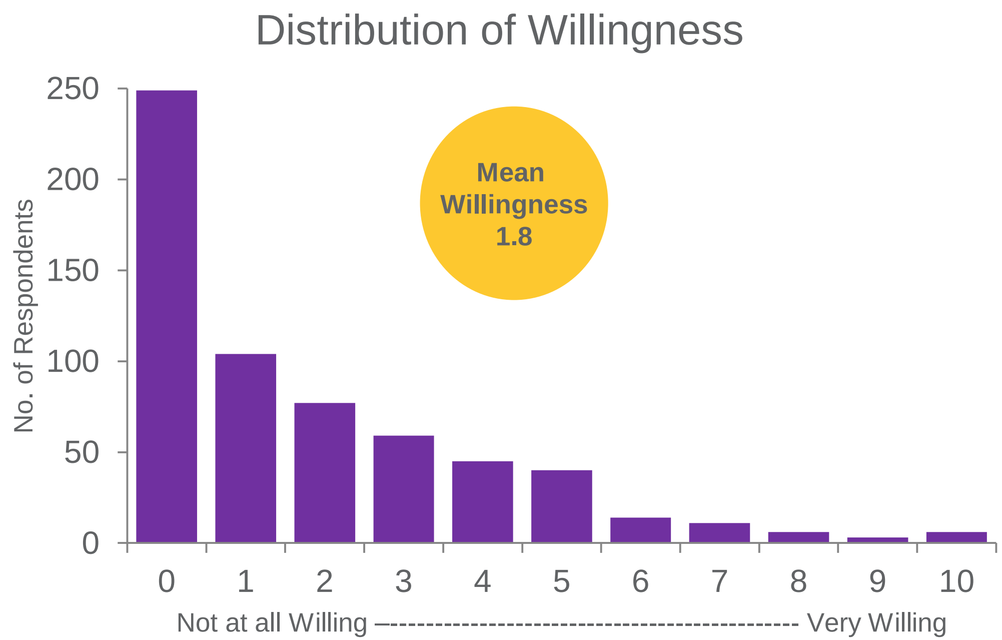


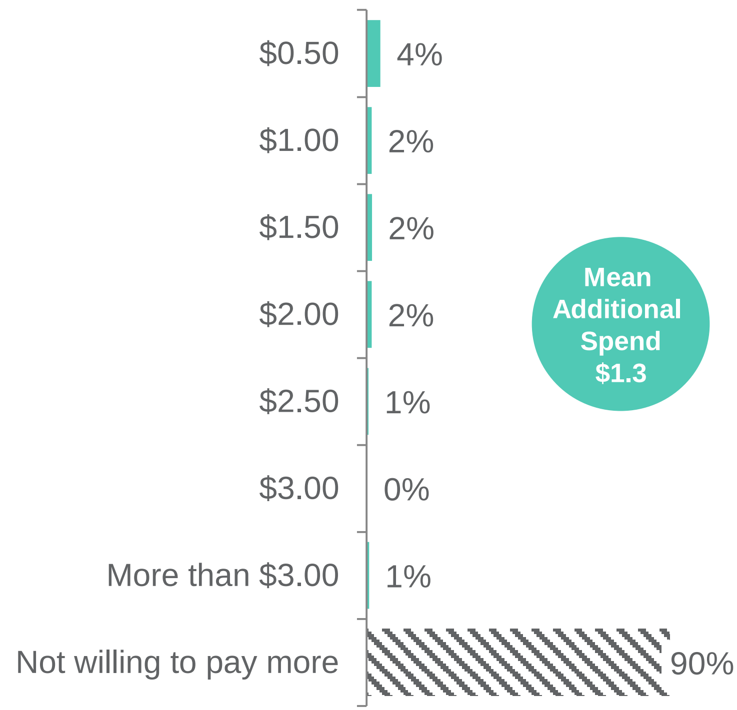


Thinking about your typical fresh vegetable shop, how willing would you be to pay MORE for Organic vegetables, compared to your regular vegetables?
Base: n=614

Willingness to Pay More. Imported vegetables.

Willingness to pay more for Imported vegetables was significantly lower than Australian grown and Organic vegetables, with a majority not willing to pay more for such products.
Of those consumers who were willing to pay more for Imported vegetables, $0.50 more than regular was considered reasonable.



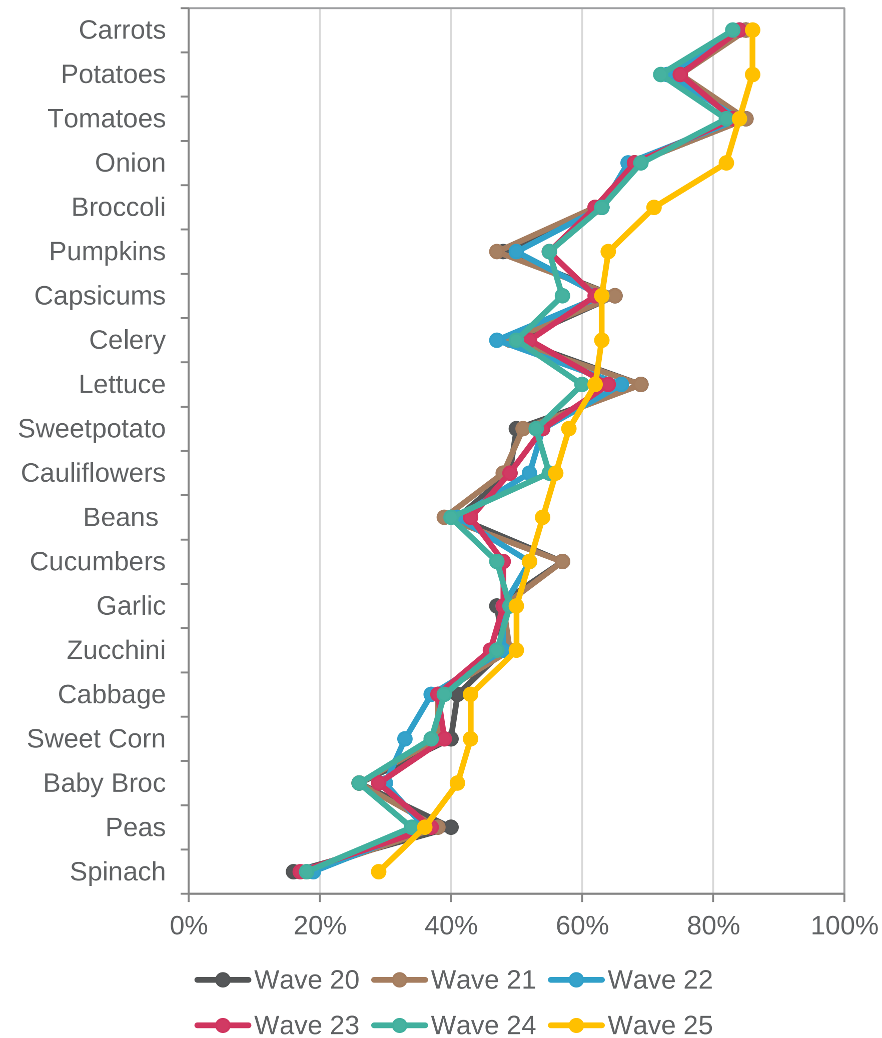


Thinking about your typical fresh vegetable shop, how willing would you be to pay MORE for Imported vegetables, compared to your regular vegetables?
Base: n=614

Wave 25: Overall Vegetable Tracking

The top 3 vegetables purchased last month were carrots, potatoes and tomatoes.

This month sees a noticeable increase in the overall purchase of vegetables. In particular, potatoes, onion, pumpkin, celery and beans.



Sample Wave 20 N= 825
S8. Which of the following fresh vegetables have you purchased in the last month?

Category Health Explained

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

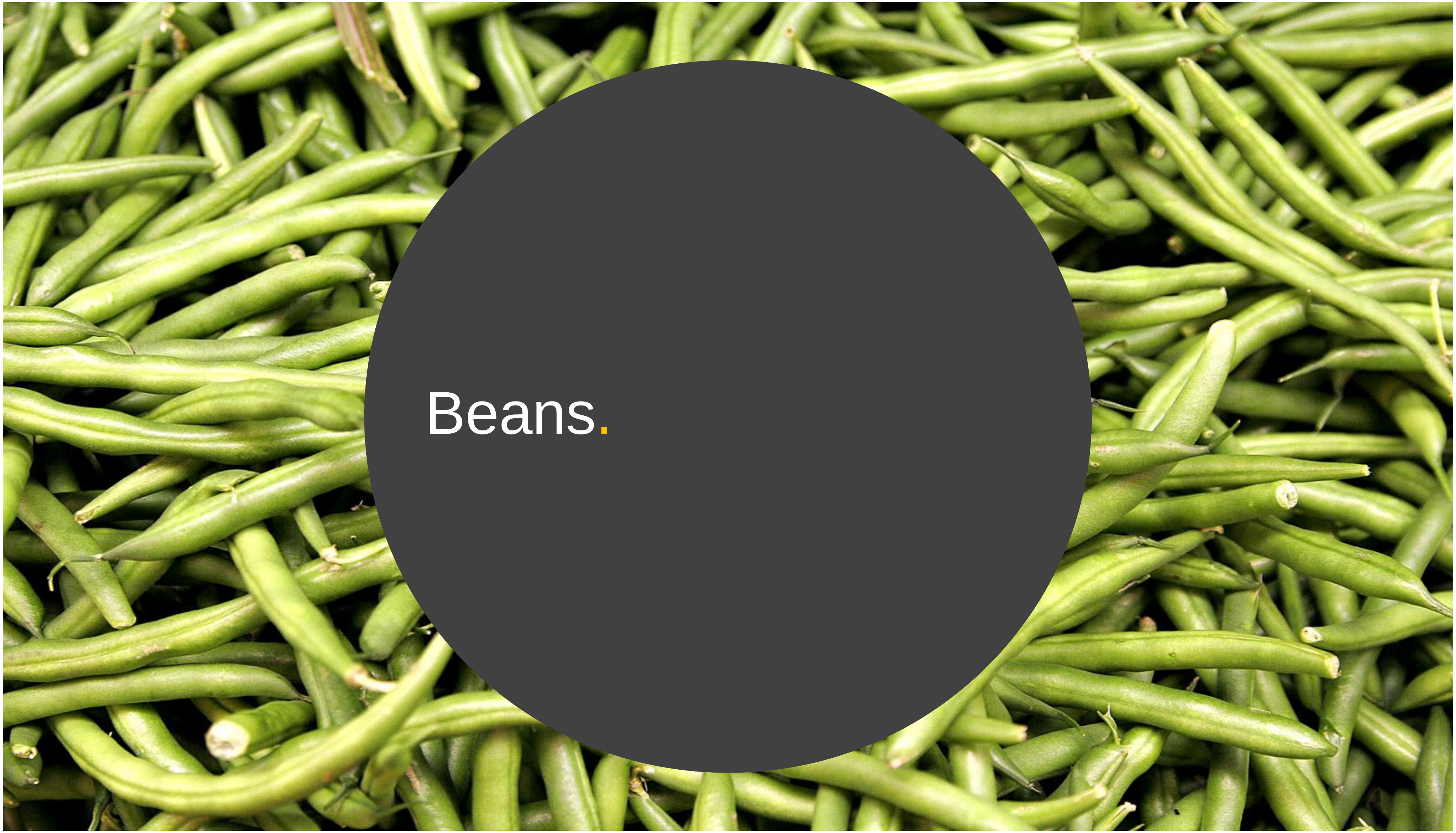
The Harvest Mean is the average of all commodities tracked thus far.

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

Pumpkin, Baby Broccoli and Silverbeet hold the greatest importance to consumers, whilst they are most satisfied with Silverbeet and Pumpkin. Consumers are most likely to recommend parsley to their family and friends. In the future, consumers intend to purchase more Silverbeet and Baby Broccoli.

	Beans	Carrots	Cauliflower	Pumpkin	Baby Broccoli	Silverbeet	Parsley	Harvest Total Mean
Importance	6.4	5.7	5.1	6.8	6.7	6.6	7.2	6.3
Satisfaction	6.5	6.8	6.6	7.2	6.8	7.0	6.9	6.6
Endorsement	7.0	7.1	7.0	7.2	7.3	7.4	7.5	6.8
Interest (New Types)	6.1	5.6	5.7	6.3	6.4	6.8	6.7	6.2
Future Purchase More Same Less	17% 82% 1%	11% 88% 0%	16% 81% 3%	13% 87% 0%	18% 81% 1%	20% 78% 1%	13% 85% 2%	15% 84% 2%

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



Beans.

Purchase frequency and consumption of beans have both increased this wave.

Purchase from specialist retailers has declined after seeing substantial increases in previous waves.

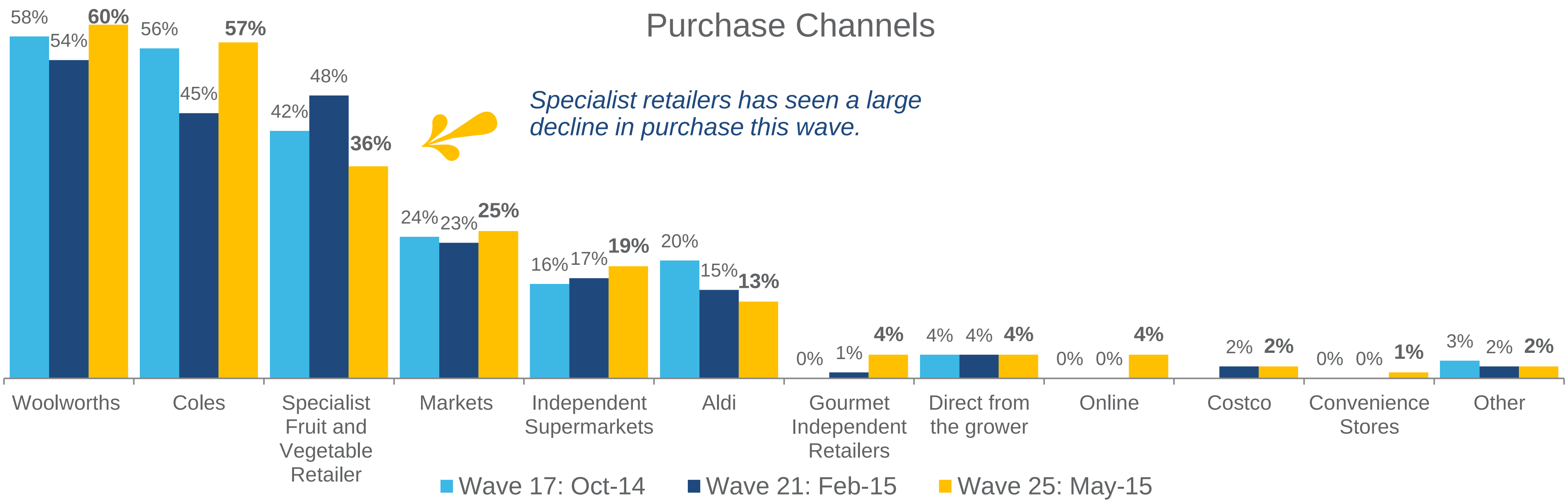
Average Purchase **3.9** times per month

▼ 3.6 times, Wave 17
▼ 3.5 times, Wave 21

Average Consumption **8.7** times per month

▼ 8.4 times, Wave 17
▼ 7.0 times, Wave 21

Purchase Channels



Q1. On average, how often do you purchase French and runner beans?
Q2. On average, how often do you consume French and runner beans?
Q5. From which of the following channels do you typically purchase French and runner beans?
Sample, Wave 17 N=279, Wave 21 N=309, Wave 25 N=306

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

Average weight of purchase is higher this wave at 660g. Value perceptions of beans have continually improved in the last three waves, with recalled last spend slightly decreasing.

Average weight of purchase

The typical consumer purchased **660g** of beans, which has slightly increased since the past wave.

▼ 610g, Wave 17
▼ 600g, Wave 21

Recalled last spend

Recalled last spend on bean purchase was **$3.50**, relatively similar to previous waves.

— $3.50, Wave 17
▲ $3.70, Wave 21

Value for money

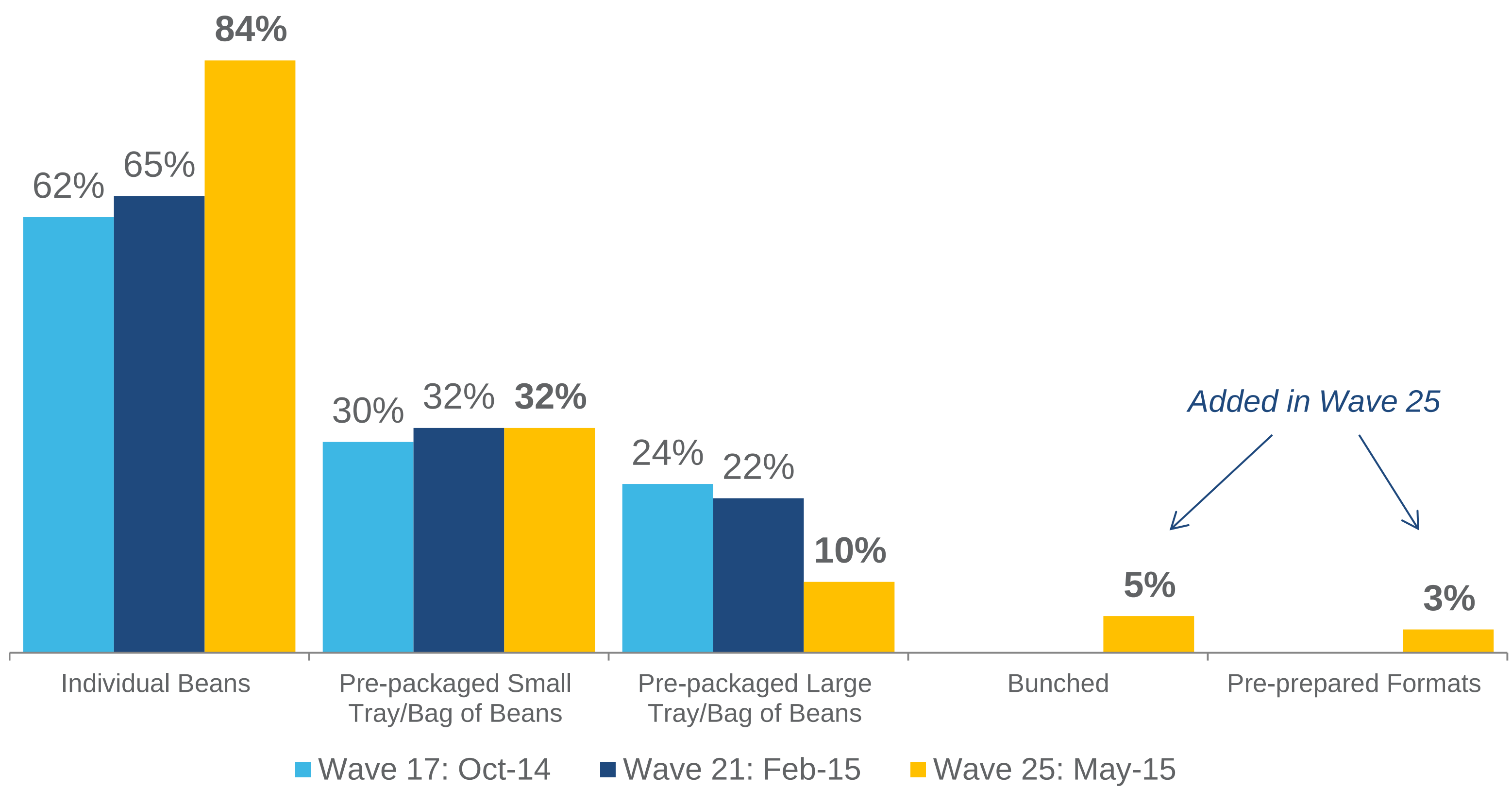
Consumer's perceived value for money was good **(6.4/10)**, showing an increasing trend across waves.

▼ 6.0/10, Wave 17
▼ 6.3/10, Wave 21

Q3. How much French and runner beans do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is?
Sample, Wave 17 N=279, Wave 21 N=309, Wave 25 N=306

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

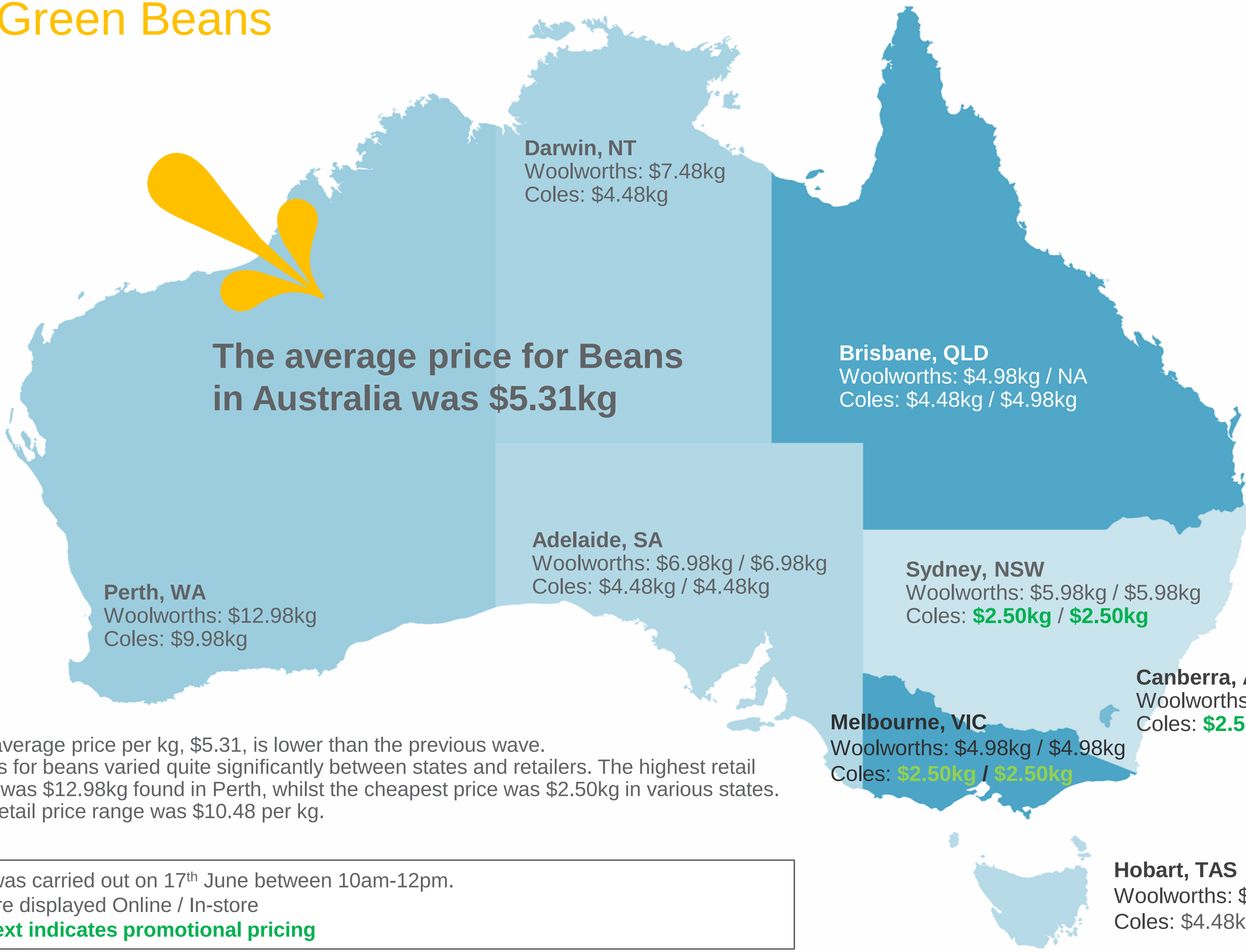
Loose beans remain the most common format purchased, increasing considerably since the previous wave.



Q4b. In what fresh formats do you typically purchase Beans?
Sample, Wave 17 N=279, Wave 21 N=309, Wave 25 N=306

Online and In-store Commodity Prices

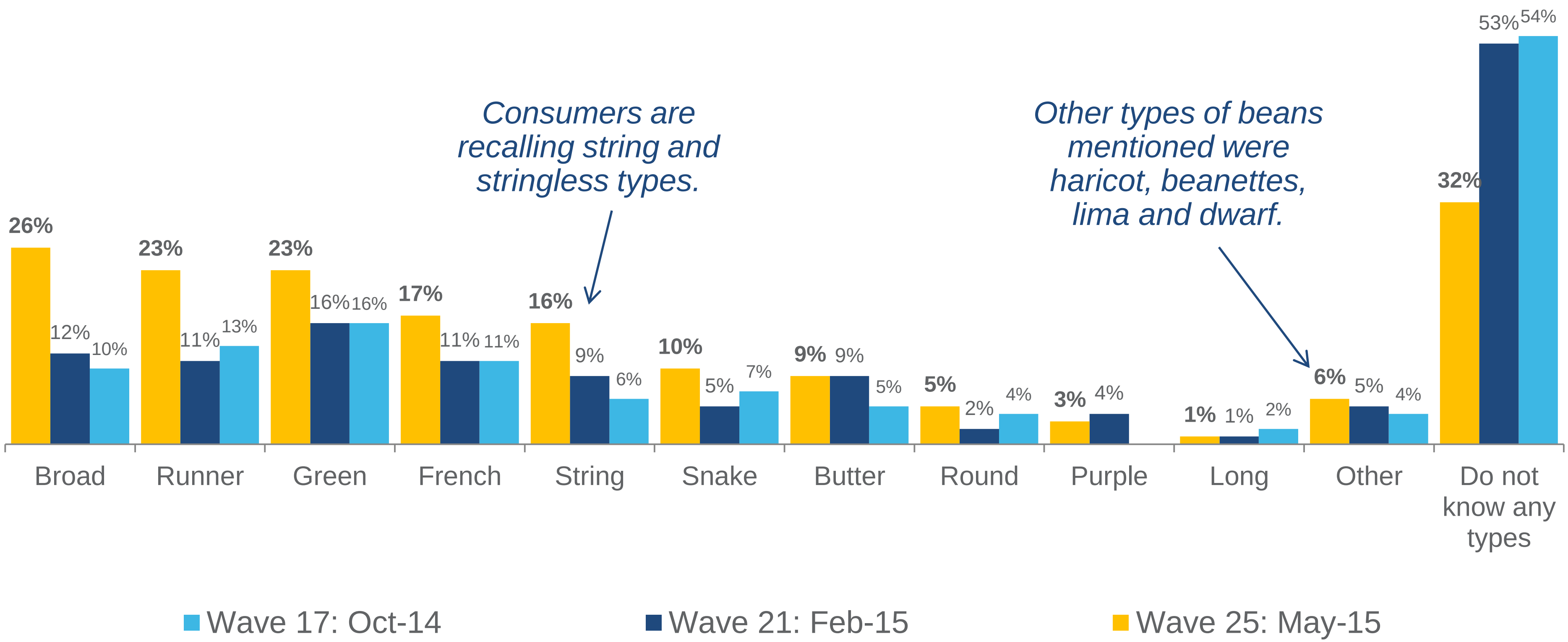
Green Beans



- The average price per kg, $5.31, is lower than the previous wave.
- Prices for beans varied quite significantly between states and retailers. The highest retail price was $12.98kg found in Perth, whilst the cheapest price was $2.50kg in various states.
- The retail price range was $10.48 per kg.

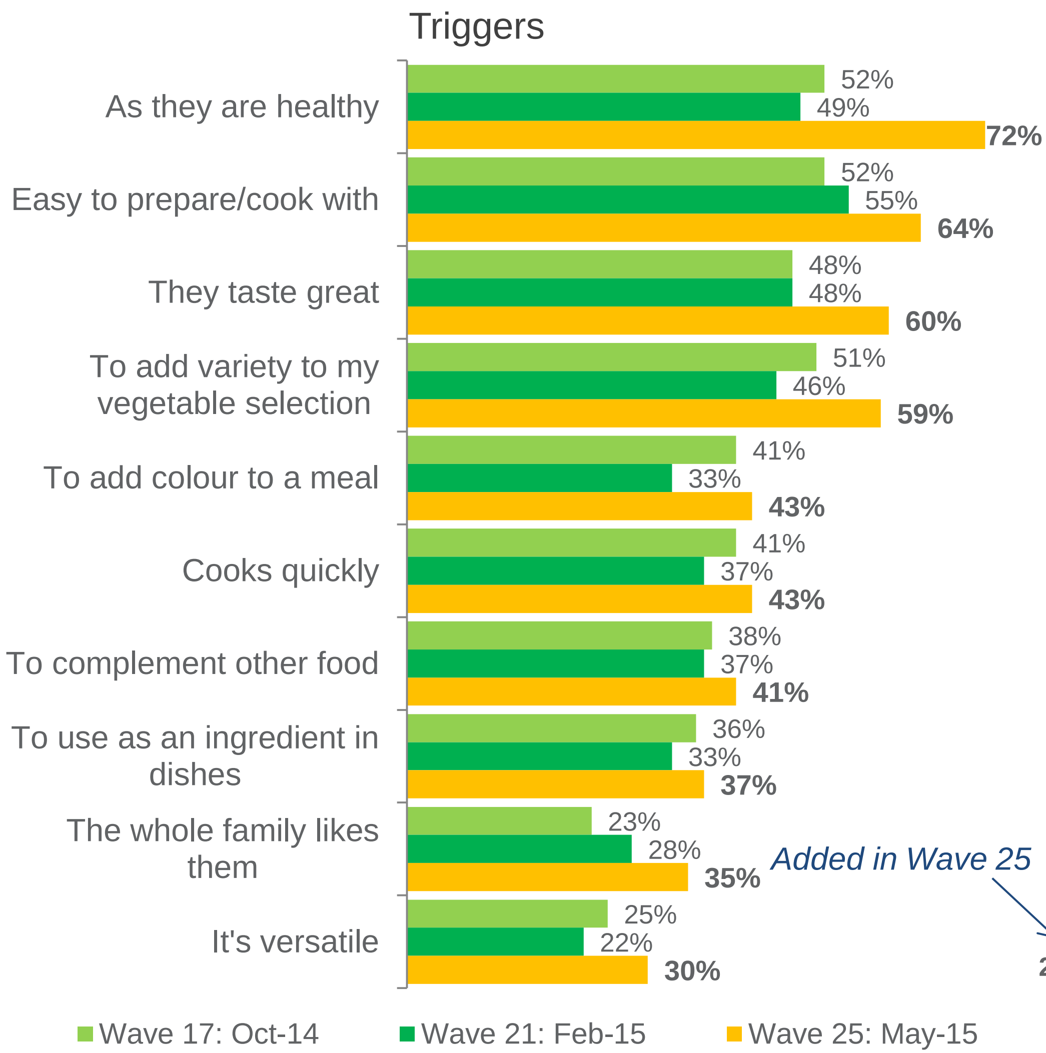
Pricing was carried out on 17th June between 10am-12pm.
Prices are displayed Online / In-store
Green text indicates promotional pricing

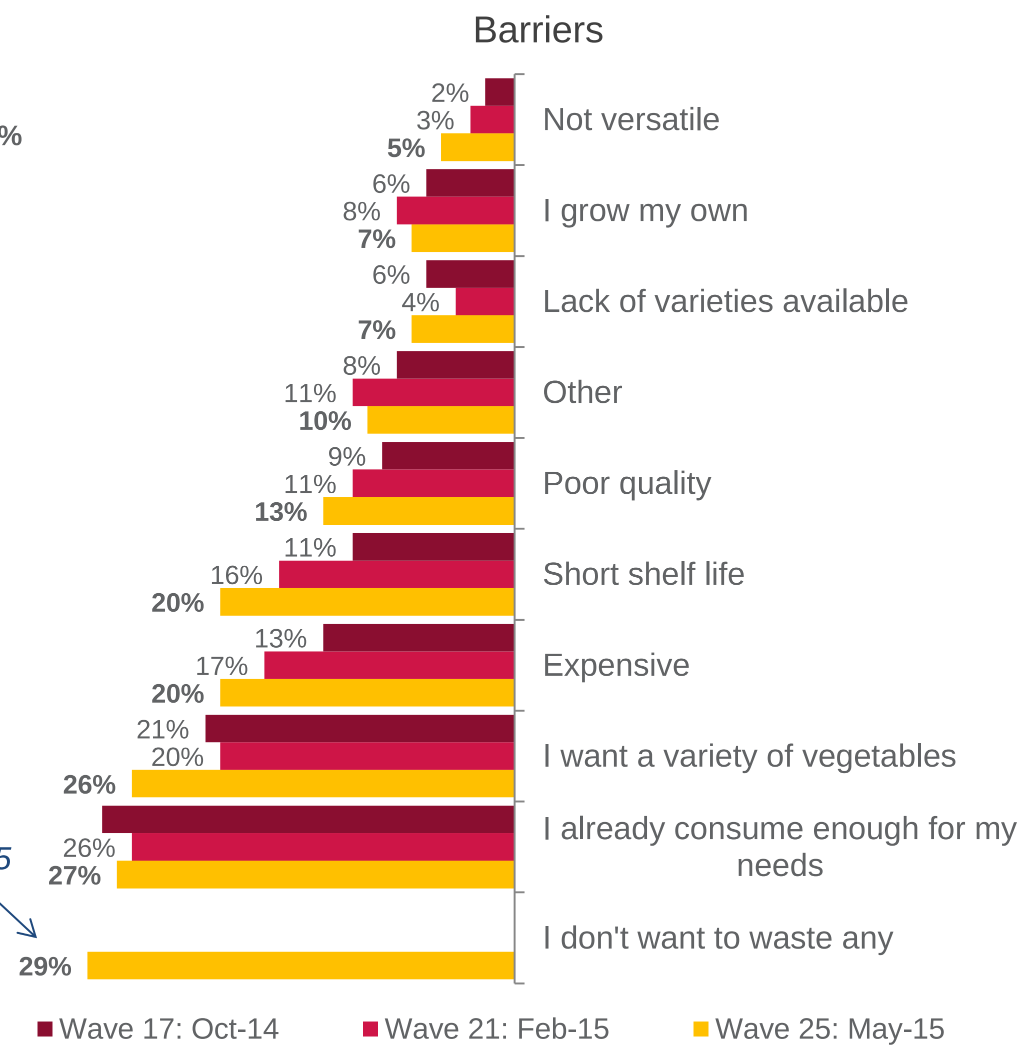
This month there was a noticeable increase in the awareness of bean types. Broad, runner and green varieties had the greatest level of recall.



Q6a. What varieties/types of French and runner beans are you aware of? (unprompted)
Sample, Wave 17 N=279, Wave 21 N=309, Wave 25 N=306

Health and easy to prepare are the primary motivations to purchasing beans. Hesitation around wastage was the main barrier to purchase as well as consuming enough for their needs.





Q7. Which of the following reasons best describes why you purchase French and runner beans?
Q8. Which reason best describes why you don't buy French and runner beans more often?
Sample, Wave 17 N=279, Wave 21 N=309, Wave 25 N=306

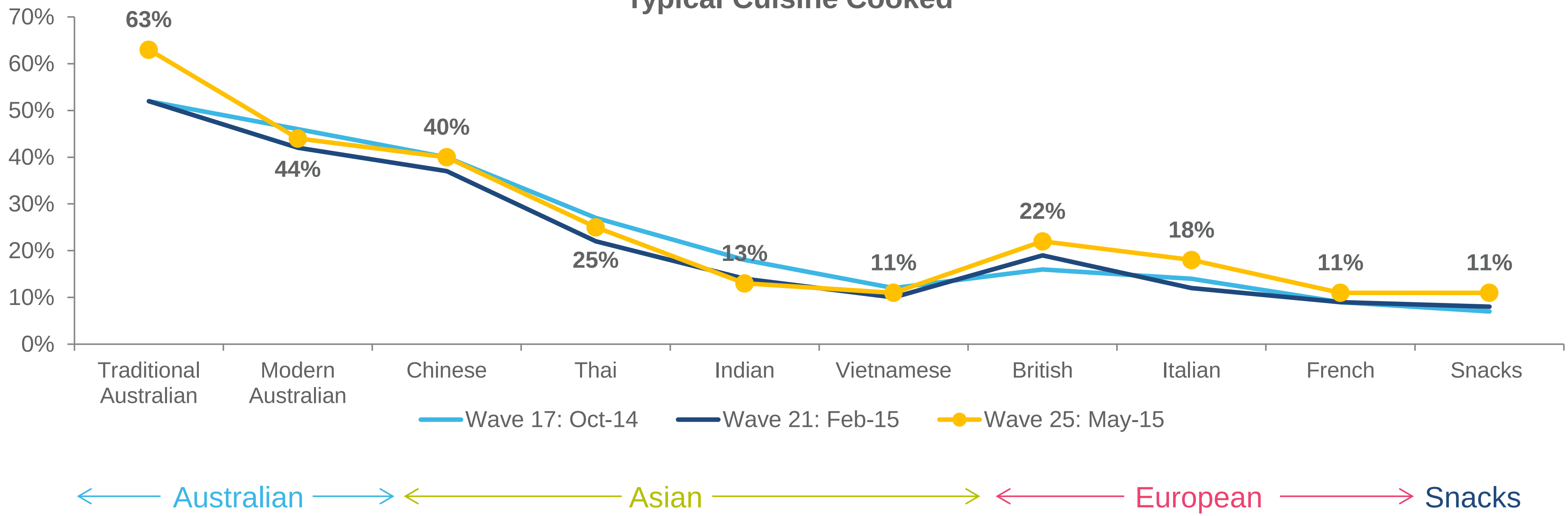
Cooking cuisines are on trend with previous months, with Traditional Australian cuisine showing the biggest increase.

Dinner is the key meal occasion for beans.

Top 5 Consumption Occasions

	Wave 25
Dinner	73%
Family Meals	67%
Weekday Meals	52%
Weekend Meals	43%
Quick Meals	38%

Typical Cuisine Cooked



Q10. What cuisines do you cook/consume that use French and runner beans?
Q11. Which of the following occasions do you typically consume/use French and runner beans?
Sample, Wave 17 N=279, Wave 21 N=309, Wave 25 N=306

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

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

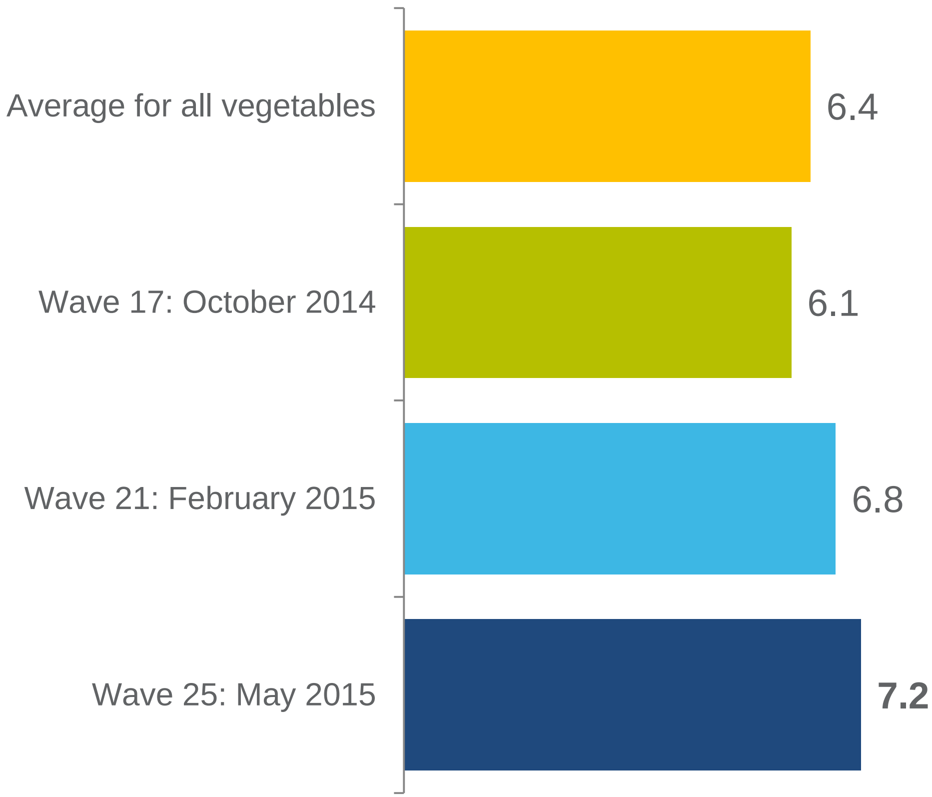
Accompanying Vegetables

Carrot	70%
Potato	62%
Broccoli	42%
Cauliflower	33%
Pumpkin	30%

Top 10 Cooking Styles			
	Wave 17	Wave 21	Wave 25
Steaming	52%	52%	63%
Stir frying	48%	48%	50%
Boiling	38%	40%	46%
Soup	12%	11%	20%
Raw	15%	13%	19%
Microwave	23%	22%	18%
Sautéing	10%	10%	16%
Stewing	12%	10%	14%
Deep Frying	1%	1%	8%
Grilling	3%	1%	4%

Q9. How do you typically cook French and runner beans?
Q10a. And when are you serving French and runner beans which of the following do you also serve together with this?
Sample, Wave 17 N=279, Wave 21 N=309, Wave 25 N=306

This wave continues the increasing trend in the importance of provenance for beans. Knowing that beans are grown in Australia is even more important to consumers.



8.2

Q14. When purchasing <commodity>, how important is Provenance to you?
Sample, Wave 17 N=279, Wave 21 N=309, Wave 25 N=306

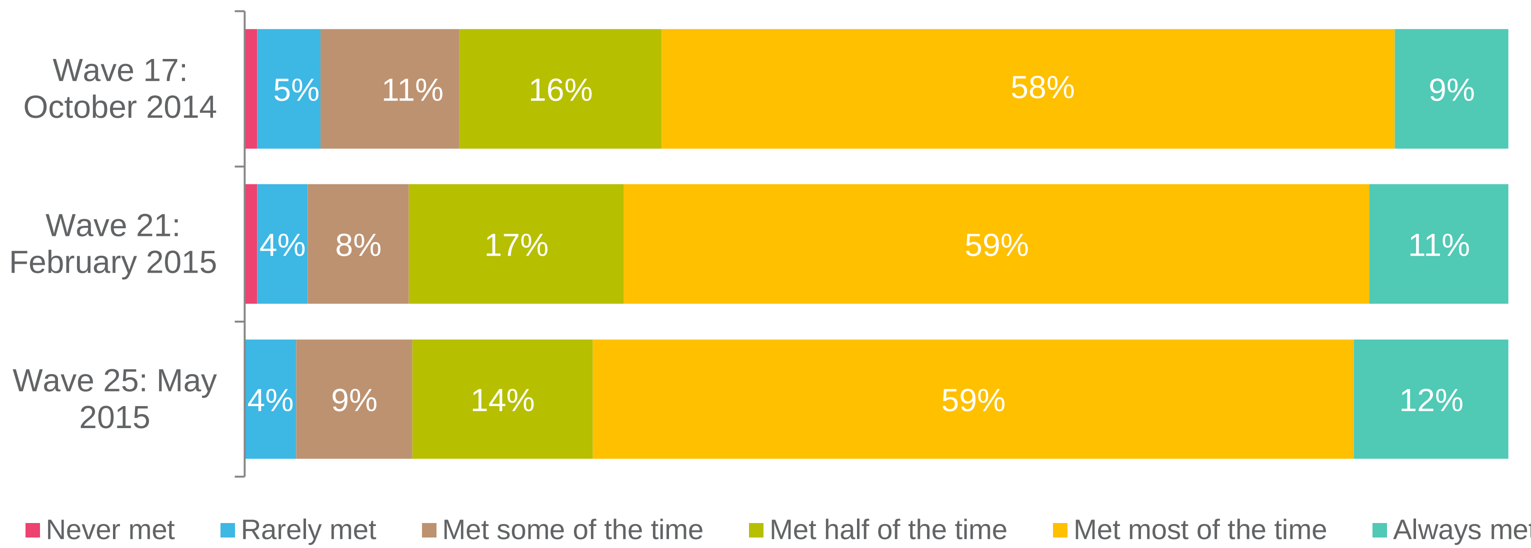
Beans are expected to stay fresh for one week once purchased, which is consistent across previous waves.

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

Expected To stay fresh for **7.2** days

7.2 days, Wave 17
7.1 days, Wave 21

Expectations Met



Q12. How long do you expect French and runner beans to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy French and runner beans?
Sample, Wave 17 N=279, Wave 21 N=309, Wave 25 N=306

Horticulture Innovation Australia
colmar brunton.

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

Bean Product Launch Trends.

Bean Global NPDs
May – July 2015

154 products containing green beans were launched globally in the last three months. Asia Pacific was the key region for launches. Meals and baked goods were top categories with environmentally friendly packaging and preservative free claims utilised most.

Bean Product Launches:
Last 3 Months (May – July 2015)
Summary

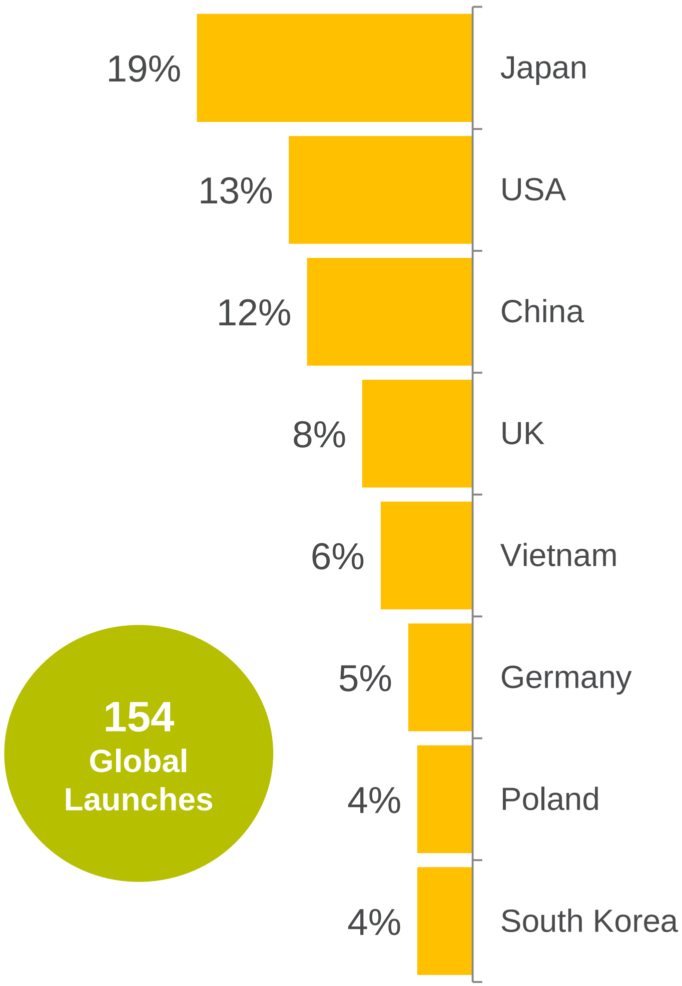
- A total of 154 products containing French and Runner beans as an ingredient were launched globally in the last 3 months, which is consistent with previous trends.
- There were no products launched in Australia in the past three months.
- Asia Pacific (51%) continued to be the top region for product launches.
- Flexible (33%) and tray (16%) packaging formats are consistently used for bean products launched.
- The top categories for product launches were meals (21%), baked goods (12%) and snacks (12%), with meals sharply increasing from the previous wave.
- The core claims used for these launches globally were ethical – environmentally friendly packaging (23%), no additives/preservatives (16%) and vegetarian (15%).
- The most innovative launch was the anti-cellulite lotion from Iran, with the ability to diminish cellulite. Examples of innovative green bean products can be found on the following slides.

Source: Mintel (2015)

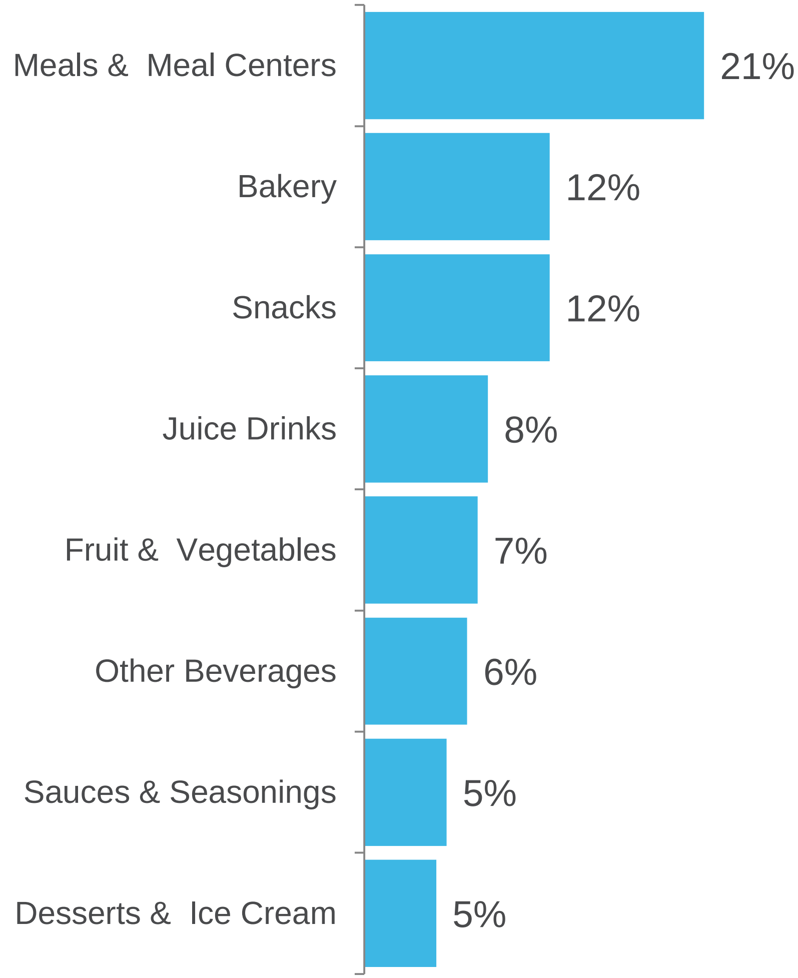
Bean Launches
Country, Region & Categories

- Japan was the key country for green bean product launches, followed by USA and China.
- Meals, bakery and snack products were the top categories for launches, consistent with previous trends.

Top Launch Countries



Top Launch Categories



Number of Global Beans NPDs for the L3M N=154

Bean Launches
Top Claims & Pack Formats Used

- Ethical – Environmentally friendly packaging was the most prominent claim in Wave 25. No additives/preservatives and vegetarian were also common claims used.
- Globally the top pack formats used for product launches was flexible packaging and trays.

Pack Formats Used

Global	Flexible	33%
Global	Tray	16%
Global	Flexible Sachet	9%
Asia Pacific	Flexible	37%
Asia Pacific	Flexible Sachet	14%
Asia Pacific	Carton	11%
Europe	Flexible	28%
Europe	Tray	28%
Europe	Bottle	15%

Top Claims Used

Global	Ethical - Environmentally Friendly Package	23%
Global	No Additives/Preservatives	16%
Global	Vegetarian	15%
Asia Pacific	No Additives/Preservatives	18%
Asia Pacific	Vegetarian	15%
Asia Pacific	Ethical - Environmentally Friendly Package	15%
Europe	Ethical - Environmentally Friendly Package	35%
Europe	Microwaveable	23%
Europe	Vegetarian	20%

Number of Global NPDs for the L3M N=154
Only regions with n >30 are displayed

Innovative Bean Launches:
L3M (May – July 2015)

An Phú Green Bean Filled Dumplings (Vietnam)

An Phú Banh Bao Nhan Dau Xanh (Green Bean Filled Dumplings) have been relaunched under a new brand name, previously known as Phu Gia, and now come in a newly designed 260g pack containing 6 x 45g units. The product features the excellent quality.

Claims:
NA

Ito En Ichinichibun No Yasai Energy Fortifying Vegetable Juice (Japan)

Ito En Ichinichibun No Yasai Energy Fortifying Vegetable Juice is a new variety only available in CVS. It is made from 350g vegetables, and contains dietary fibre, iron, vitamin C, calcium, b-carotene, potassium and magnesium. The product is free from added sugar and salt, and retails in a recyclable 200ml carton.

Claims:
No Additives/Preservatives, Other (Functional), Ethical - Environmentally Friendly Package, Low/No/Reduced Sugar, Low/No/Reduced Sodium, Female

Unifreeze Seven Vegetable Mix (Poland)

Unifreeze Mieszanka 7-mio Skladnikowa (Seven Vegetable Mix) comes from the manufacturer's own quality resource base, minimizing the time between the harvest and freezing. The product retails in a 450g pack. The manufacturer supports the Great Orchestra of Christmas charity and a diabetes programme.

Claims:
Ethical - Charity, Diabetic, Low/No/Reduced Sugar

El Gallo Giro Chicken and Vegetables Soup (Mexico)

El Gallo Giro Caldo Tlalpeño (Chicken and Vegetable Soup) has been relaunched previously under the Las Sevillanas brand. This preservative-free product is a traditional Mexican meal, and can be accompanied with some drops of lemon, avocado, chilli and corn wraps. It retails in a 420g pack.

Claims:
No Additives/Preservatives

Source: Mintel (2015)

Innovative Bean Launches:
L3M (May – July 2015)

Healthy Choice Country Vegetable Soup (Ireland)

Healthy Choice Sopa de Vegetales (Country Vegetable Soup) has been repackaged with an updated design. This soup features a cup of vegetables, 100 calories, and 480mg sodium per serving and can be microwaved. This product contains no MSG and retails in a new 397g pack featuring a QR code.

Claims:
No Additives/Preservatives, Microwaveable

Unifreeze Cut Green Beans (Poland)

The product is made using manufacturer's own quality resource base, minimizing the time between the harvest and freezing. It retails in a 450g pack featuring information for diabetics on the amount of insulin to be taken while consuming the product which is part of manufacturer's involvement with Great Orchestra of Christmas Charity and a programme dedicated to people who suffer from diabetes.

Claims:
Ethical - Charity, Diabetic, Low/No/Reduced Sugar

Lisa's Kitchen Sweet Peas with Onions in Chef-Inspired Parmesan Herb Sauce (USA)

Lisa's Kitchen Sweet Peas with Onions in Chef-Inspired Parmesan Herb Sauce has been relaunched with a new brand name, having previously been known as Lisa's Organics. The microwavable product comprises organic Washington-grown sweet peas and organic diced onion in a light and flavorful sauce. It is suitable for vegetarians, and is USDA and California certified organic. It is free from gluten, and is described as easy to prepare. The product retails in a newly designed 10-oz. recyclable pack.

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

Phu Hai Whole Green Bean (Vietnam)

Phu Hai Do Xanh Nguyen Hat (Whole Green Bean) is ideal for processing food. This product retails in a 200g pack.

Claims:
NA

Source: Mintel (2015)

Innovative Bean Launches:
L3M (May – July 2015)

Findus World Selection Wok Hot Bangkok Chili & Lime Leaves (Finland)

Findus World Selection Wok Hot Bangkok Chili & Lime Leaves are frozen vegetables for wok, frying pan or microwave cooking and ideal to serve with fish. The product can be prepared in six to eight minutes, and retails in a 450g pack featuring a recipe suggestion and the Swedish Keyhole logo.

Claims:
Microwaveable

Khanomthai Lookjeab Printed Bean Cake (Thailand)

Khanomthai Lookjeab Printed Bean Cake is now available. The product retails in a 120g pack.

Claims:
NA

Thanh Loc Whole Green Bean (Vietnam)

Thanh Loc Do Xanh (Whole Green Bean) has been repackaged in a newly designed 150g pack. This vegetarian product is ideal for baking, cooking sweets, and sticky rice.

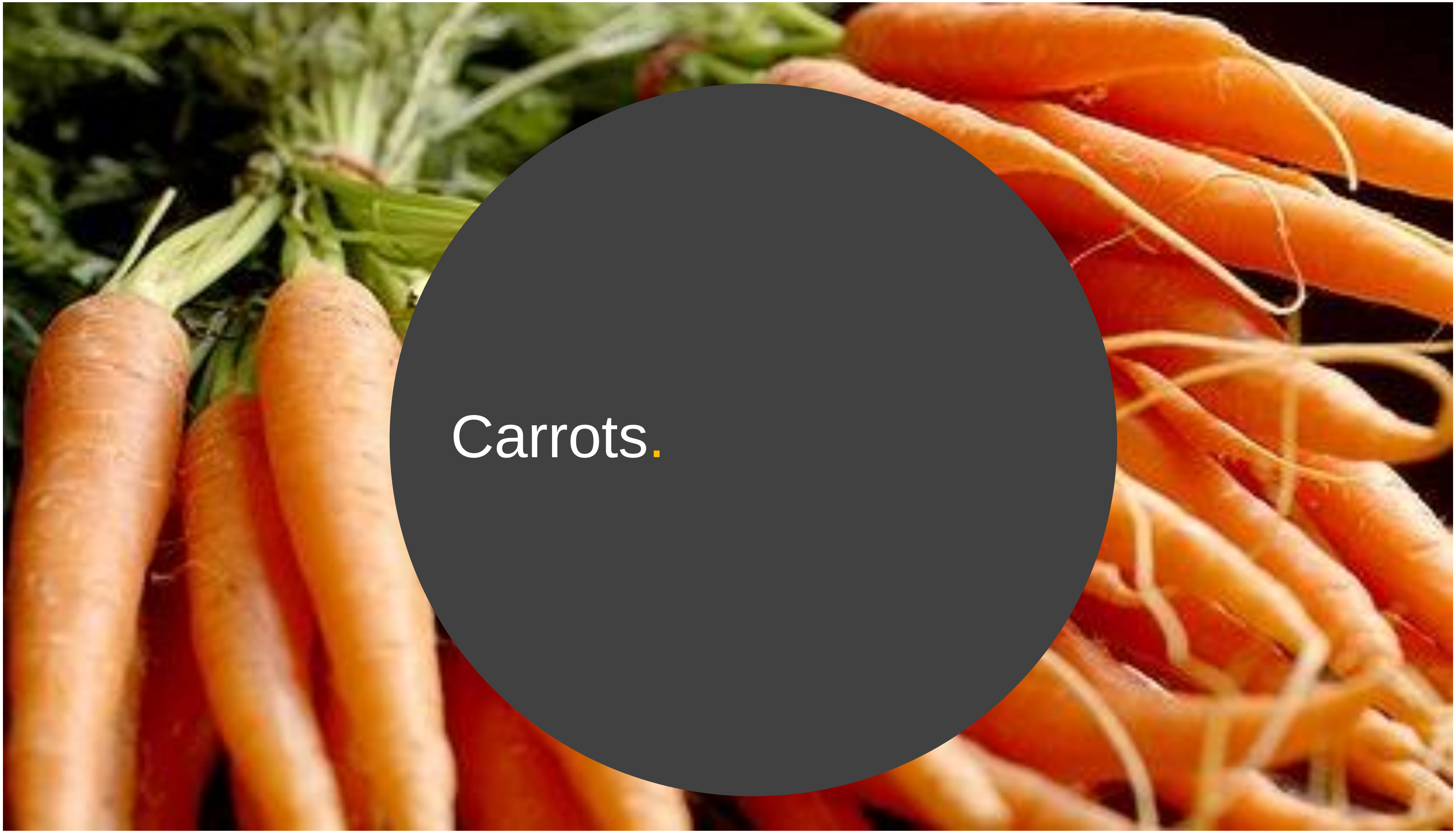
Claims:
Beauty Benefits, Anti-Ageing, Vegetarian, Cardiovascular (Functional)

Prime Corpex Anti-Cellulite Lotion (Iran)

Prime Corpex Anti-Cellulite Lotion is claimed to diminish cellulite and orange peel skin, shedding adipocytes with an ultrasound-like effect, to slim and firm the body. This multi-function product contains specialized botanical complexes to counteract the main cellulite symptoms and signs of ageing skin. Its formula comprises Lipocare, Intenslim, Phytosonic, Regestril, Lanachrys and ginger extract. The product retails in a 200ml pack.

Claims:
Botanical/Herbal, Anti-Ageing, Anti-Cellulite, Firming, Slimming

Source: Mintel (2015)



Carrots.

Consumption occasions are down again this month. However, carrots are still consumed very frequently, almost once every second day.

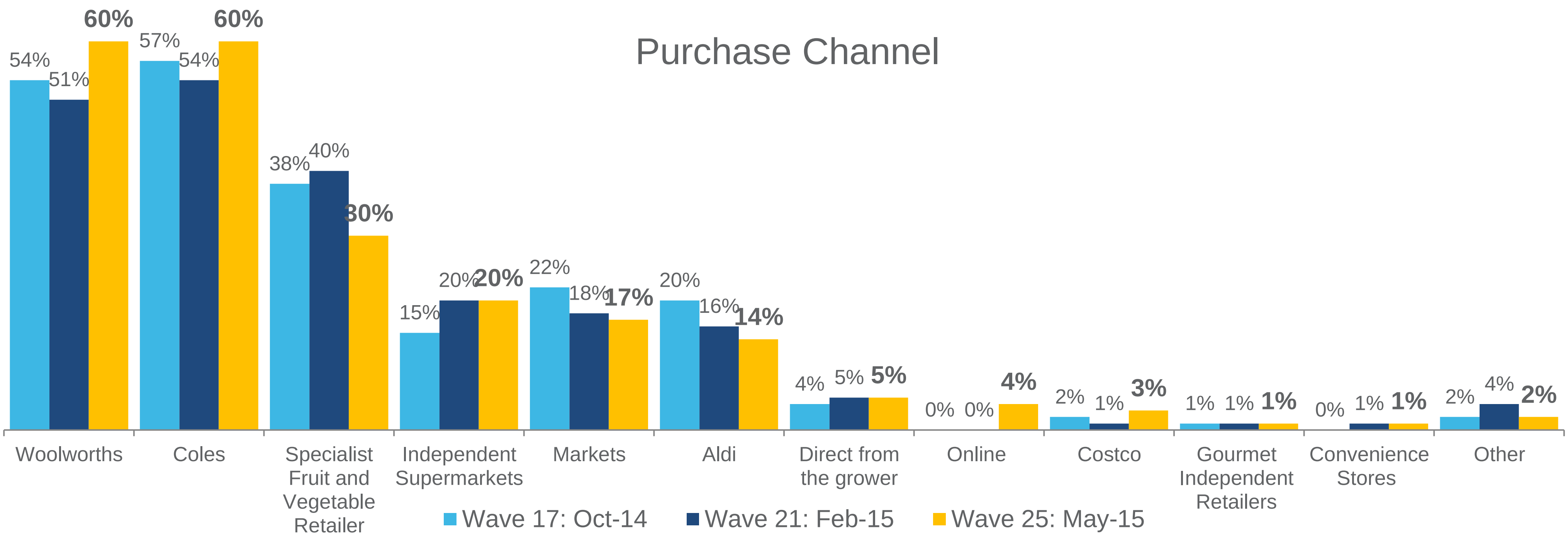
There has been a large increase in purchase from mainstream retailers, with a subsequent decrease in purchase from specialist retailers.

Average Purchase **3.9** times per month

▼ 3.8 times, Wave 17
▼ 3.7 times, Wave 21

Average Consumption **14.0** times per month

▲ 15.6 times, Wave 17
▲ 14.4 times, Wave 21



Q1. On average, how often do you purchase carrot?
Q2. On average, how often do you consume carrot?
Q5. From which of the following channels do you typically purchase carrot?
Sample Wave 17 N=304, Wave 21 N=312, Wave 25 N=305

Horticulture Innovation Australia
colmar brunton.

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

Carrots are perceived as very good value for money, consistent across waves. On average consumers purchase 1.2 kg of carrots per shop.

Average weight of purchase

The typical consumer purchased **1.2kg** of carrots, which has slightly improved this waves.

— 1.2kg, Wave 17
▼ 1.1kg, Wave 21

Recalled last spend

Recalled last spend on carrots was **$2.30.** This is just below the previous waves.

▲ $2.40, Wave 17
▲ $2.40, Wave 21

Value for money

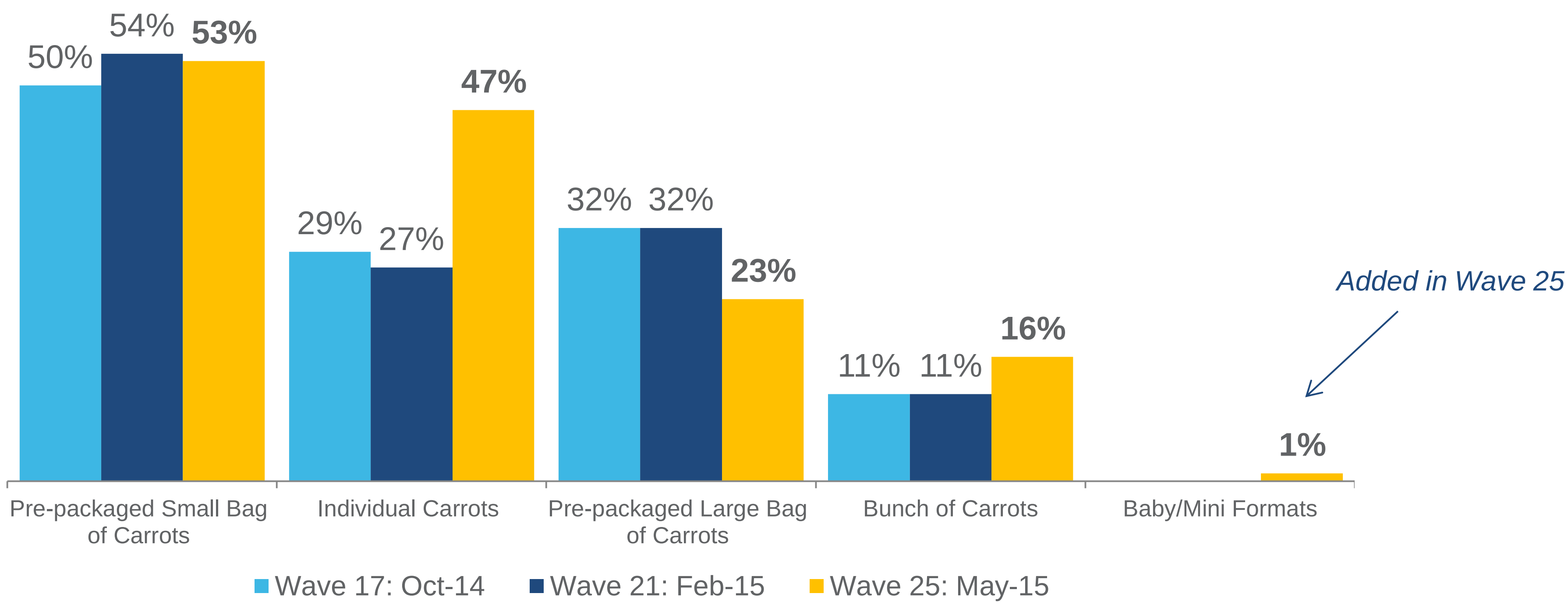
Consumer's perceived value for money is very good **(7.4/10)** and consistent with past months.

— 7.4/10, Wave 17
▲ 7.5/10, Wave 21

Q3. How much carrot do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? 0-10 scale
Sample Wave 17 N=304, Wave 21 N=312, Wave 25 N=305

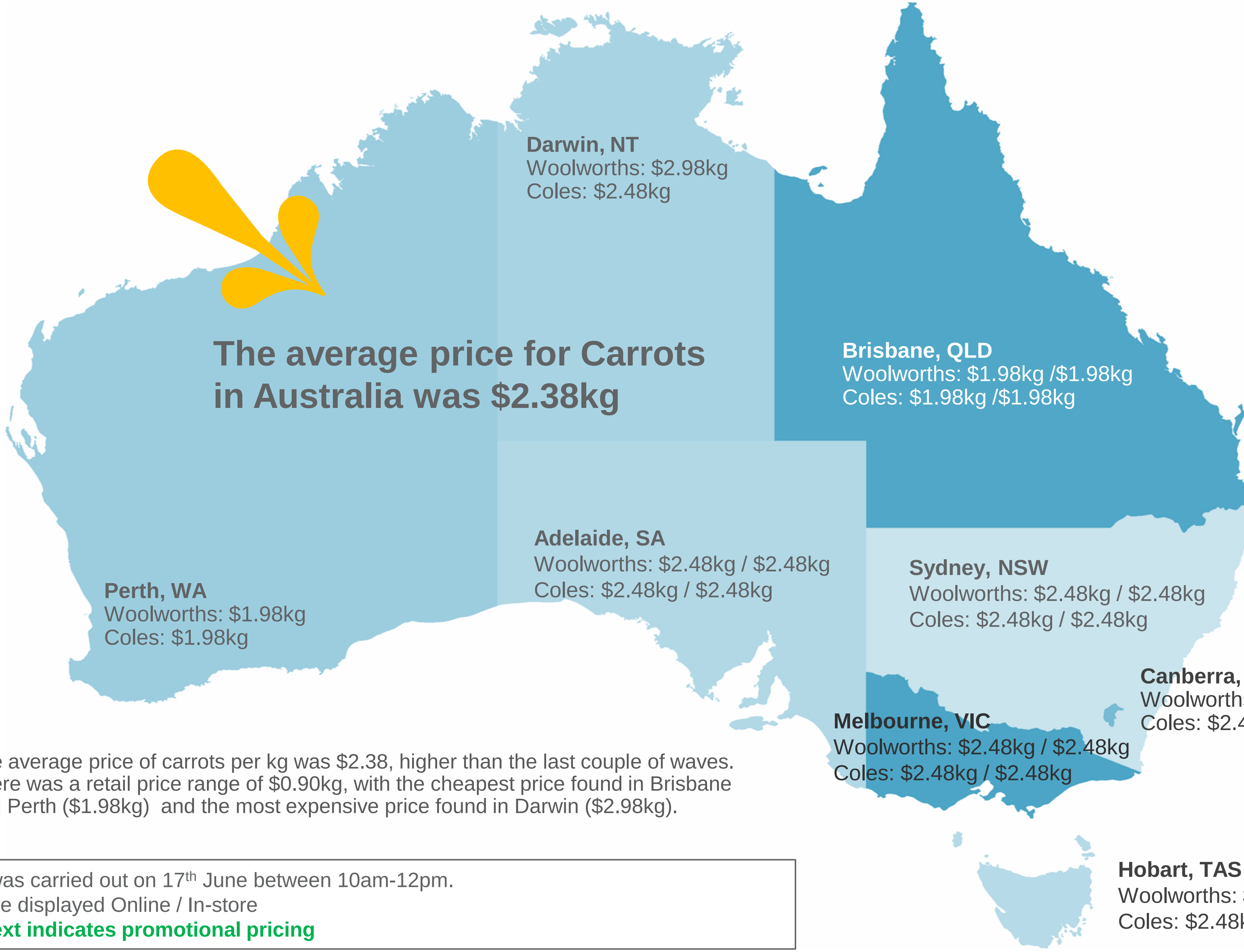
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Small bags of carrots remain the primary format purchased, with the purchase of individual carrots increasing in popularity this wave.



Q4b. In what fresh formats do you typically purchase Carrots?
Sample Wave 17 N=304, Wave 21 N=312, Wave 25 N=305

Online and In-store Commodity Prices

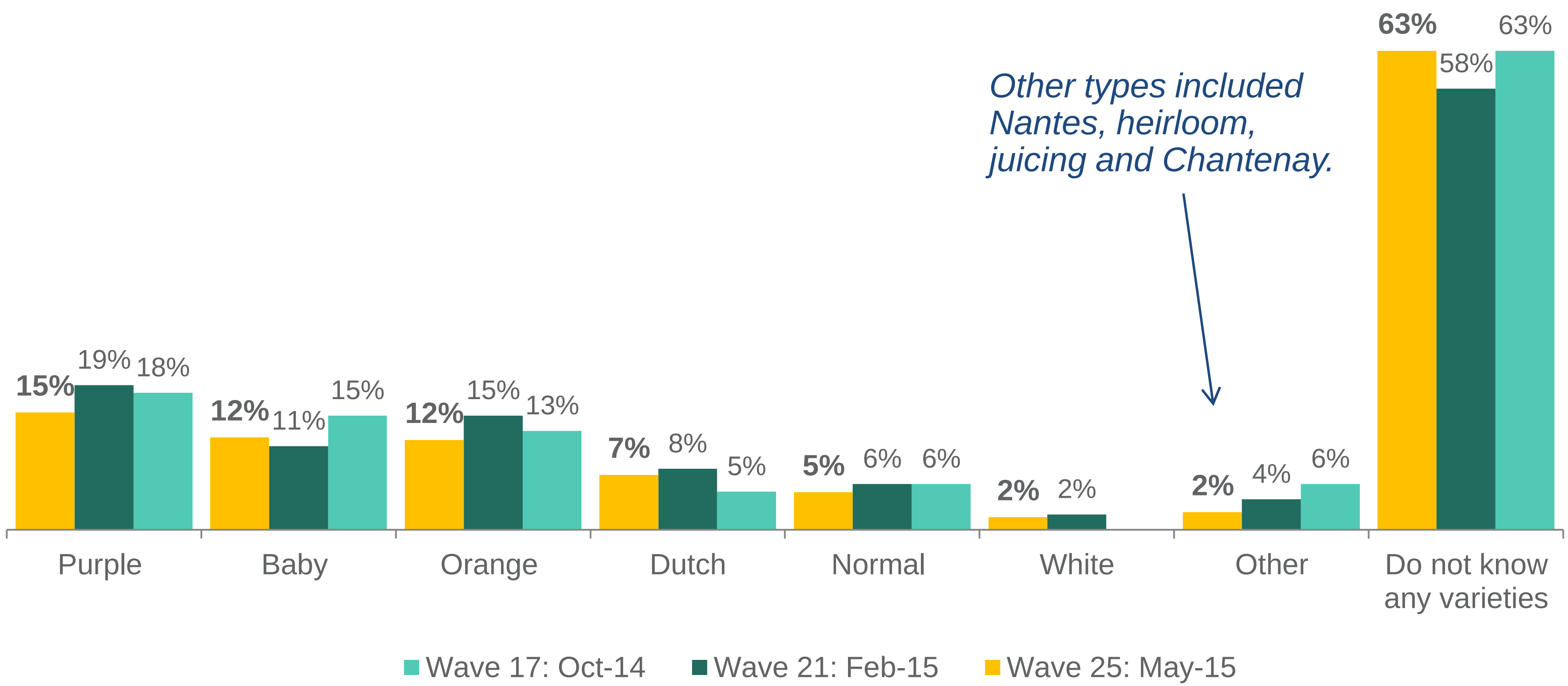


- The average price of carrots per kg was $2.38, higher than the last couple of waves.
- There was a retail price range of $0.90kg, with the cheapest price found in Brisbane and Perth ($1.98kg) and the most expensive price found in Darwin ($2.98kg).

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

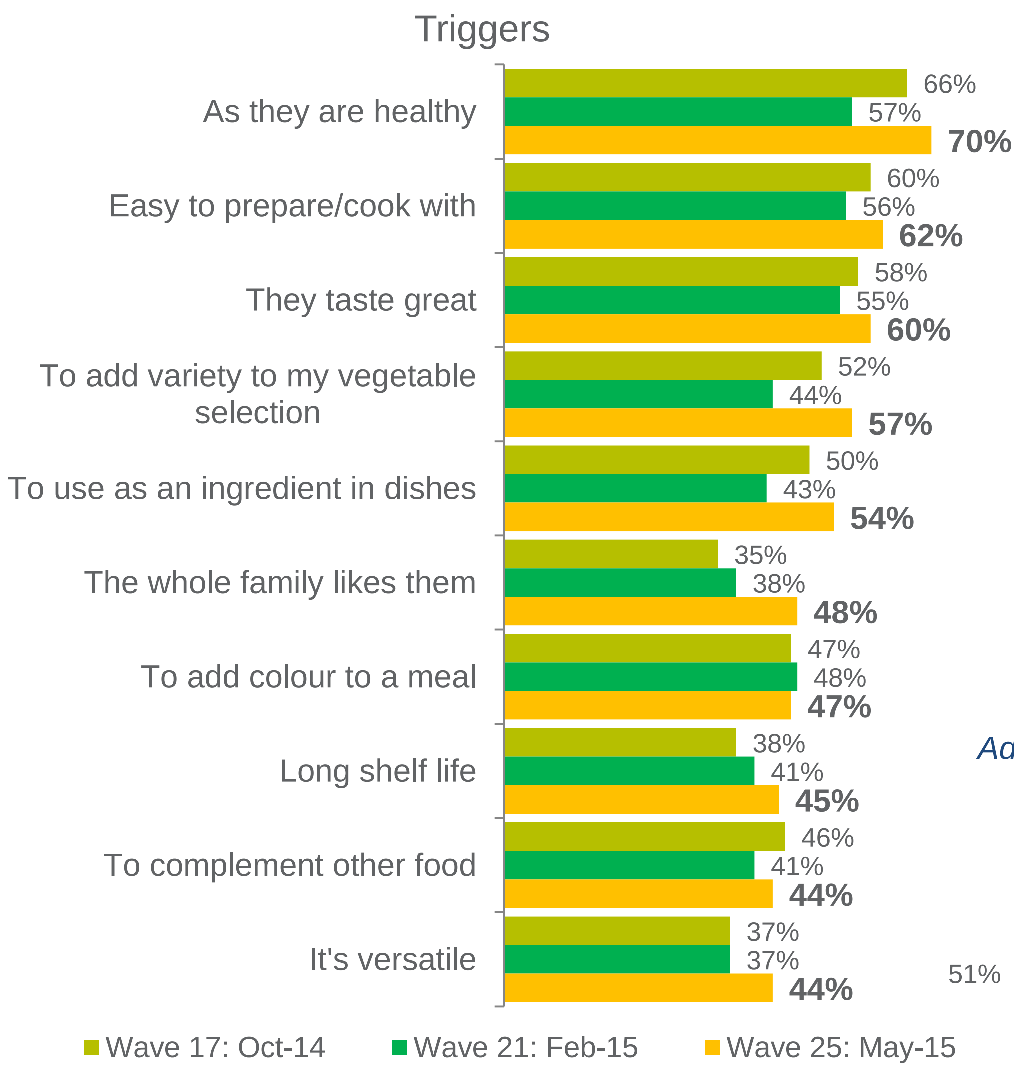
Over one half of consumers are unable to recall a type of carrot. Colour is the main trigger for unprompted carrot variety awareness.

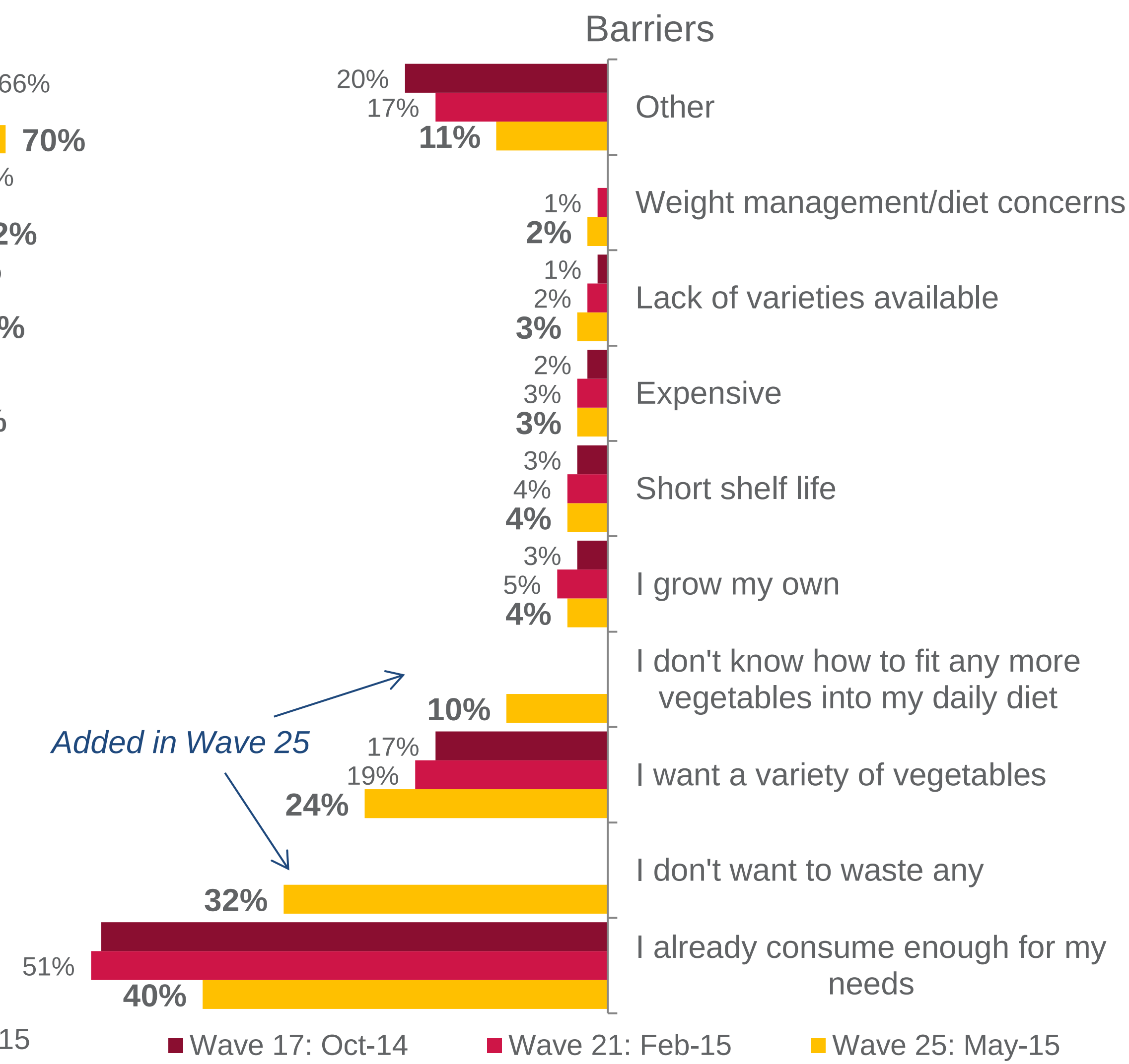
Purple and orange have the highest recall.



Q6a. What varieties/types of carrot are you aware of? (unprompted)
Sample Wave 17 N=304, Wave 21 N=312, Wave 25 N=305

Health and ease of preparation are the main drivers of carrot purchase. Not wanting to waste any is the main barrier for future purchase.





Q7. Which of the following reasons best describes why you purchase carrot?
Q8. Which reason best describes why you don't buy carrot more often?
Sample Wave 17 N=304, Wave 21 N=312, Wave 25 N=305

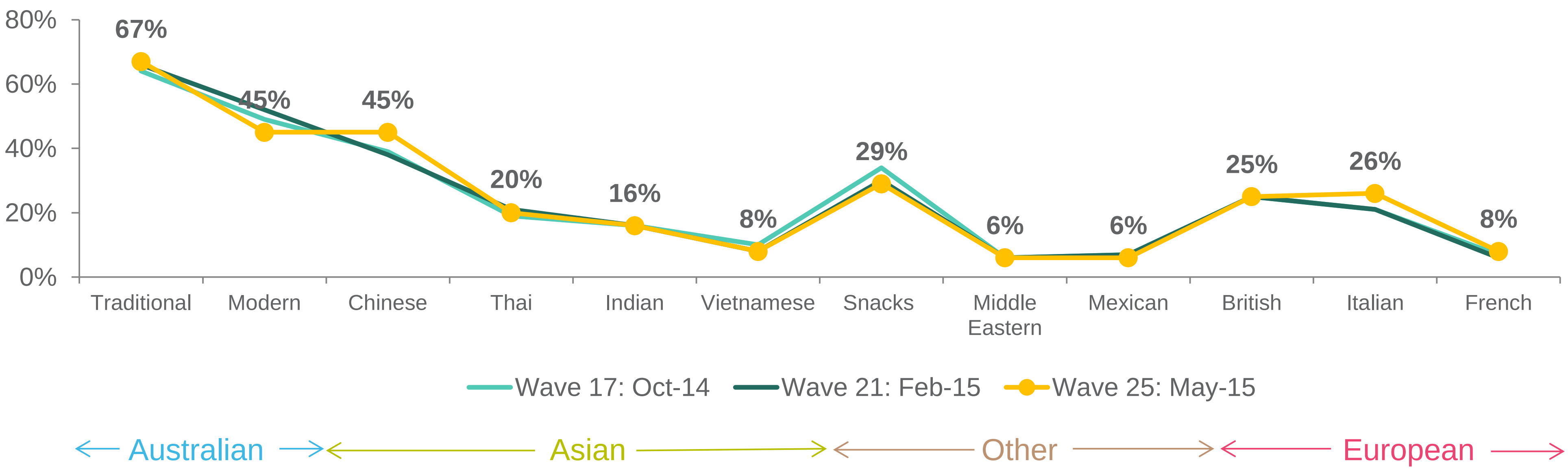
There has been no significant movement in cuisines over the previous three waves, indicating consumers may lack interest and inspiration for alternative cuisines.

Dinner remains the dominant meal occasion.

Top 5 Consumption Occasions

	Wave 25
Dinner	77%
Family Meals	69%
Weekday Meals	54%
Weekend Meals	49%
Quick Meals	39%

Typical Cuisine Cooked



Q10. What cuisines do you cook/consume that use carrot?
Q11. Which of the following occasions do you typically consume/use carrot?
Sample Wave 17 N=304, Wave 21 N=312, Wave 25 N=305

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

Carrots are typically served with potatoes, broccoli and onion.

Consumers cook carrots in a variety of ways, including roasting, stir frying, and boiling. They are also popular to eat raw.

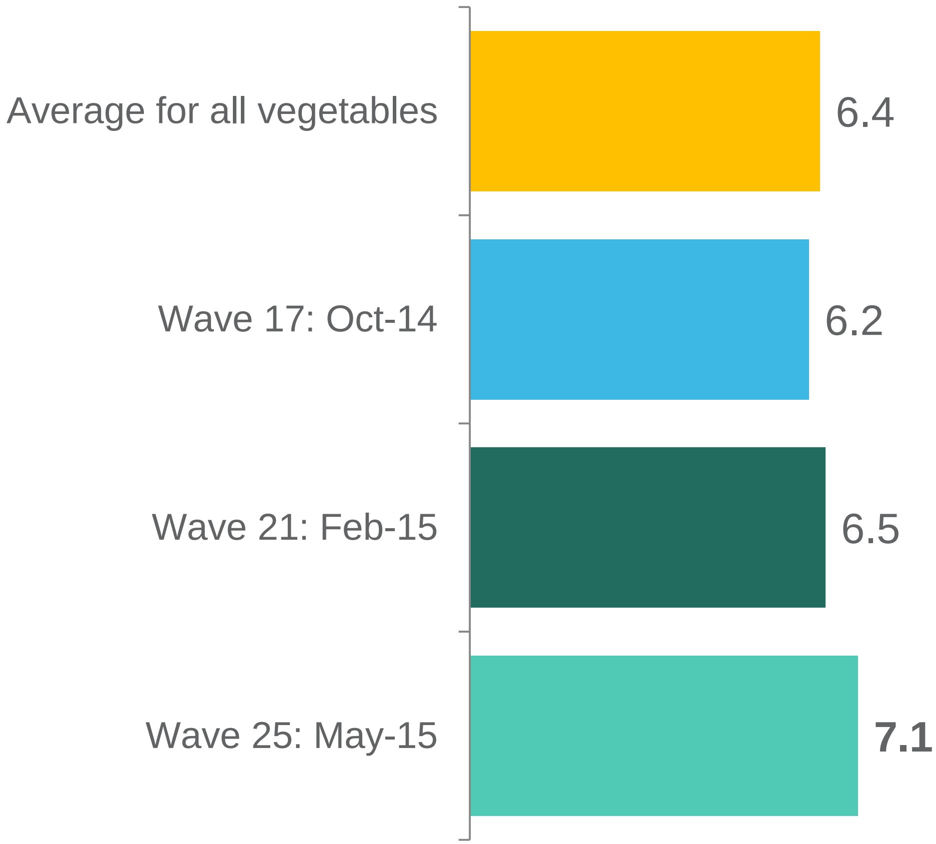
Accompanying Vegetables

Potato	68%▲
Broccoli	53%▲
Onion	38%▲
Beans	34%▲
Pumpkin	33%▼

Top 10 Cooking Styles			
	Wave 17	Wave 21	Wave 25
Roasting	47%	48%	53%
Stir frying	44%	48%	50%
Boiling	39%	46%	49%
Raw	49%	46%	47%
Steaming	51%	46%	47%
Soup	29%	34%	41%
Stewing	25%	27%	29%
Baking	27%	30%	28%
Microwave	23%	25%	25%
Sautéing	10%	9%	12%

Q9. How do you typically cook carrot?
Q10a. And when are you serving carrot which of the following do you also serve together with this?
Sample Wave 17 N=304, Wave 21 N=312, Wave 25 N=305

Carrot provenance is becoming increasingly important to consumers, steadily increasing across waves. Knowing their carrots are Australian grown is the most important provenance information to consumers.



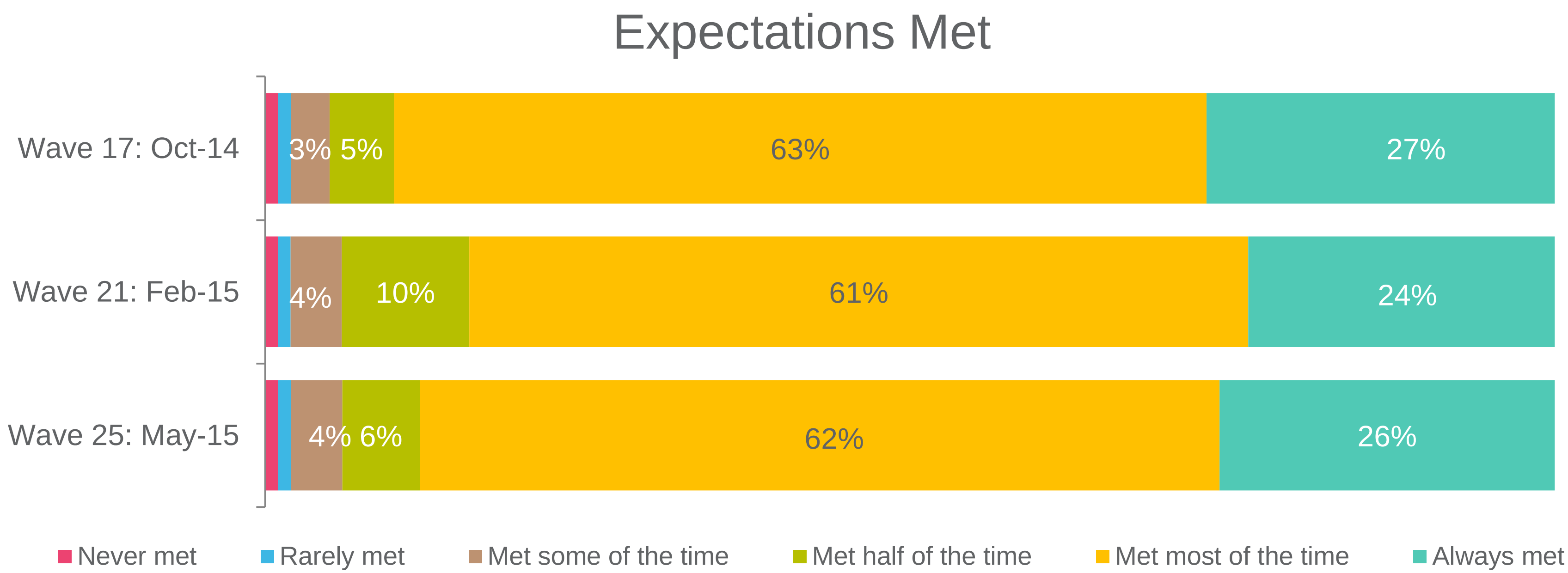
8.3

Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 17 N=304, Wave 21 N=312, Wave 25 N=305

Carrots are expected to stay fresh for around 12 days, and consumers are satisfied with carrot freshness most of the time.

Expected to stay fresh for **12.6** days

▼ 12.1 days, Wave 17
▼ 12.4 days, Wave 21



Q12. How long do you expect carrots to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy carrots?
Sample Wave 17 N=304, Wave 21 N=312, Wave 25 N=305

Horticulture Innovation Australia

colmar brunton.

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

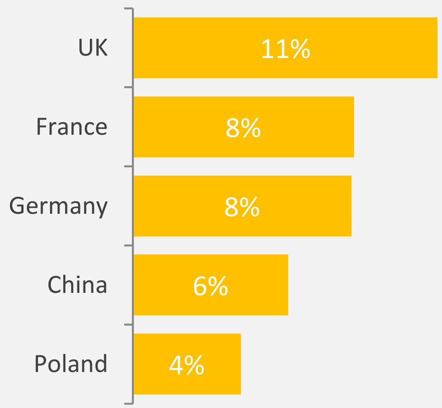
Carrot Product Launch Trends.

Carrot Global NPDs

May – July 2015

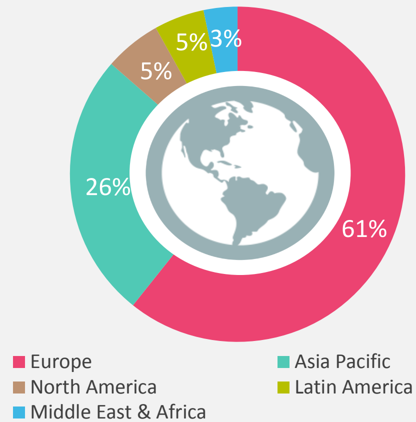
There were 2085 global new products launched over the last 3 months that contained carrot as an ingredient, a major rise from the previous wave (1699). The majority of these launches occurred in Europe. Flexible packaging was most common and the key launch category was meals.

Country

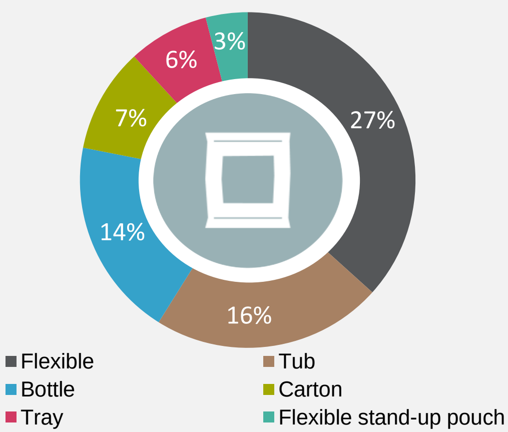


2085 Global NPDs

Region



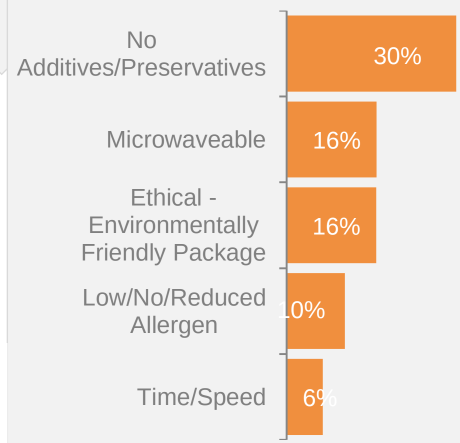
Top Pack Formats



Categories

- Meals 19%
- Sauces 9%
- Dairy 9%
- Juice Drinks 9%

Top Claims



Carrot Product Launches:
Last 3 Months (May – July 2015)
Summary

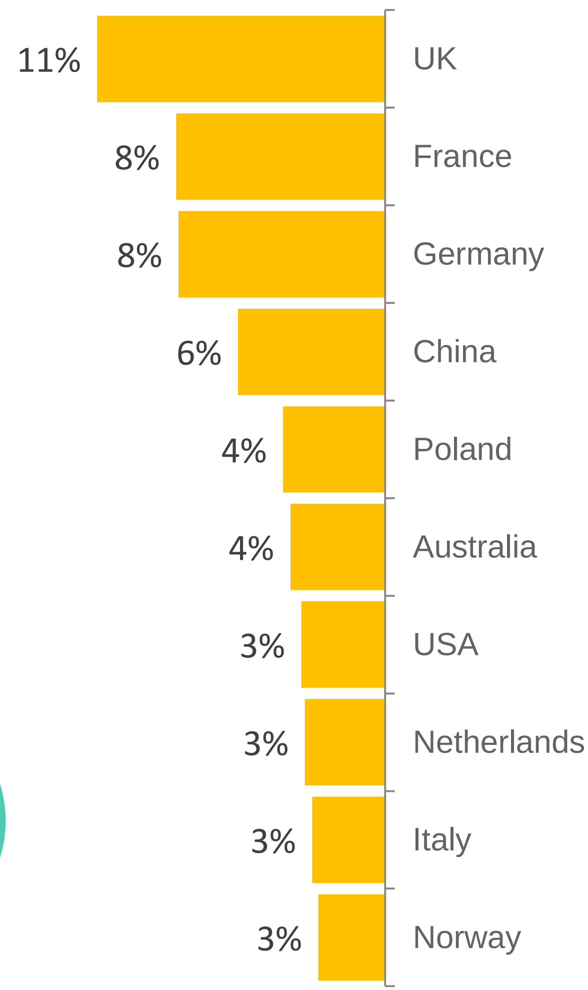
- A total of 2085 products were launched globally in the last 3 months containing carrot as an ingredient, which has sharply increased since the previous wave.
- There were 78 carrot-containing products launched in Australia in the last quarter. See upcoming pages for examples of Australian launches.
- Europe and the Asia Pacific were the 2 top regions for these product launches (61% and 26% respectively), with Asia Pacific growing in launches.
- The top pack formats used were flexible formats (27%) and tubs (16%).
- The top categories for product launches were meals (19%), sauces (9%), dairy (9%) and juice drinks (9%).
- The top claims used for launches globally were no additives/preservatives (30%), microwaveable (16%) and ethical - environmentally friendly (16%).
- The most innovative launches found were carrot rings in Italy and Bolognese pizza from Spain. Examples of these products can be found at the end of the carrot trend report.

Source: Mintel (2015)

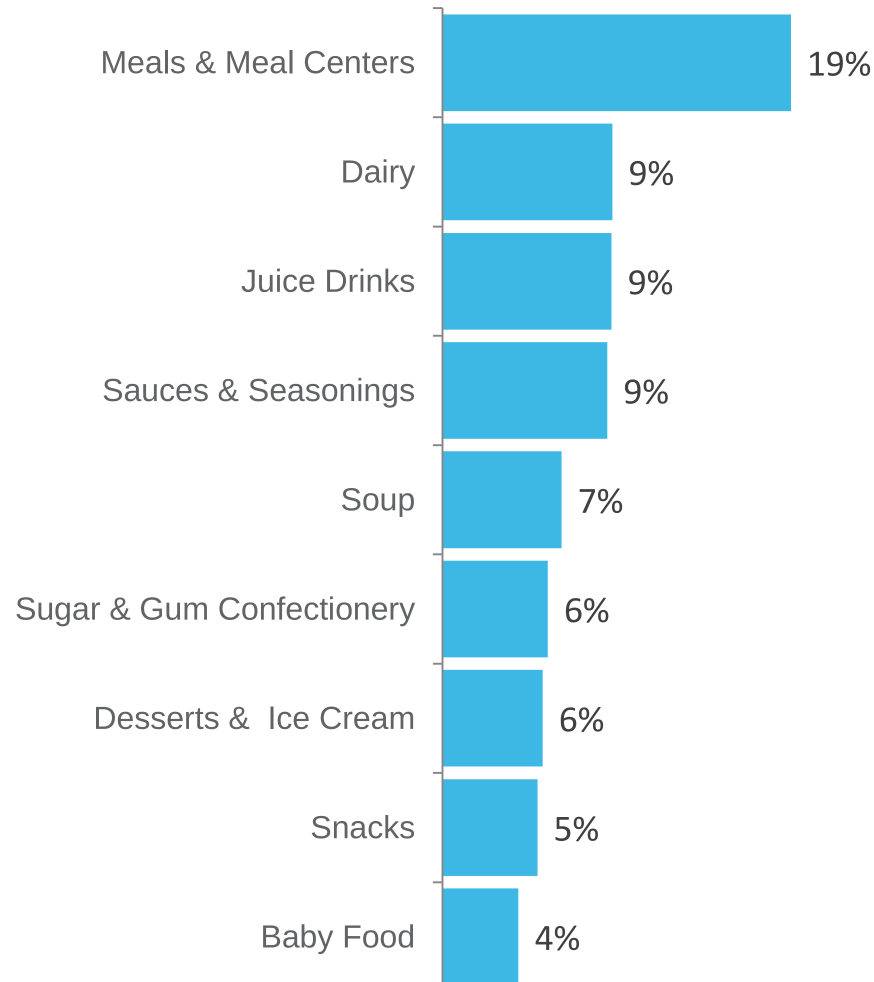
Carrot Launches
Country, Region & Categories

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

Top Launch Countries



Top Launch Categories



2085 Global Launches

Number of Global Carrot NPD for the L3M N=2085

Carrot Launches

Top Claims & Pack Formats Used

- Flexible packaging, tubs and bottles were the most common pack formats globally, consistent with formats in Europe and Asia Pacific.
- The key claim was centred around health, including no additive/ preservatives, while ethical – environmentally friendly and microwavable were also commonly used claims. These were more common in Europe, with time/speed also a popular claim in Asia Pacific.

Pack Formats Used

Global	Flexible	27%
	Tub	16%
	Bottle	14%
Europe	Flexible	24%
	Tub	20%
	Bottle	16%
Asia Pacific	Flexible	38%
	Tub	13%
	Bottle	9%

Top Claims Used

Global	No Additives/Preservatives	30%
	Microwaveable	16%
	Ethical - Environmentally Friendly Package	16%
Europe	No Additives/Preservatives	25%
	Ethical - Environmentally Friendly Package	23%
	Microwaveable	15%
Asia Pacific	No Additives/Preservatives	35%
	Time/Speed	23%
	Microwaveable	20%

Number of Global Carrot NPD for the L3M N=2085

Innovative Carrot Launches:
L3M (May – July 2015)

Pitango Carrot & Sweet Potato Soup (New Zealand)

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

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

Il Gigante Carrot Rings (Italy)

Il Gigante Carote a Rondelle (Carrot Rings) are now available. The gluten free product can be cooked in a pan for ten minutes, in a pressure cooker in three minutes or in a pot in eight to ten minutes. It is suitable for vegetarians and retails in a 450g pack.

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

James White Organic Carrot Juice (New Zealand)

James White Organic Carrot Juice is described as lively and sweet, and a glass of carrot juice is said to be a delicious way towards one's daily portion of fruit and vegetables. The product is suitable for vegetarians, is free from artificial preservatives, and retails in a 75cl bottle bearing the Soil Association and the EU Leaf logo.

Claims:
No Additives/Preservatives, Low/No/Reduced Sodium, Vegetarian, Organic

Naked Locals Franklin Hearty Vegetable Soup with Barley & Kale (New Zealand)

The microwavable product is made using the freshest premium ingredients. According to the manufacturer, they source the key ingredients from the local region in New Zealand all year round, means purchasing this product is good for local NZ farmers. The company is claimed to support Oxfam and the contribution goes towards supporting sustainable farming. The vegetarian soup is free from gluten, preservatives, artificial colours or flavours, and retails in a 500g pack.

Claims:
No Additives/Preservatives, Low/No/Reduced Allergen, Microwaveable, Ethical - Charity, Gluten-Free, Vegetarian, Ethical - Human, Premium

Source: Mintel (2015)

Innovative Carrot Launches:
L3M (May – July 2015)

Pei Tien Carrot Flavoured Rice Snack (China)

Pei Tien Hu Lou Bo WeiBi Bi Xiang Mi Bing (Carrot Flavoured Rice Snack) contains a variety of grains and are said to be delicious. This rice snack is non-fried and suitable for vegans. This halal certified product retails in a 100g pack.

Claims:

Halal, Vegan, Vegetarian, No Animal Ingredients

Shia Baby Rice with Fruit & Vegetable Baby Food (Thailand)

Shia Baby Rice with Fruit & Vegetable Baby Food has been relaunched with a new pack design and a new formulation. It is made with brown rice, fruit and vegetable, and is suitable for babies aged six months to three years. It contains 4.15mg of vitamin A, vitamin K, iodine and GABA per portion. This lactose-free product is halal certified and retails in a 115ml jar.

Claims:

Halal, Low/No/Reduced Lactose, Babies & Toddlers (0-4)

Mestemacher Protein Bread with Carrots (Germany)

Mestemacher Karotten-Brot (Protein Bread with Carrots) contains 3.2 times more protein and 65% less carbohydrates than regular whole wheat bread. This product, said to be ideal for a carbohydrate reduced diet, retails in a 250g pack. The manufacturer has been supporting social projects since 2001.

Claims:

Ethical - Charity, High Protein, Low/No/Reduced Carb, Wholegrain

Kinella Apple & Carrot Purée (Germany)

Kinella Apfel Karotte (Apple & Carrot Purée) made from 100% fruit is suitable for babies from one year of age. The product is free from gluten, added sugars and preservatives, and retails in a 90g pouch, bearing the GL Quality seal.

Claims:

No Additives/Preservatives, Low/No/Reduced Allergen, Babies & Toddlers (0-4), Low/No/Reduced Sugar, Gluten-Free

Source: Mintel (2015)

Innovative Carrot Launches:
L3M (May – July 2015)

Mister Rabbit Classic Mini Carrots (Brazil)

Mister Rabbit Mini Cenouras Classic (Classic Mini Carrots) have been repackaged in a newly designed 250g pack. These ready-to-eat baby carrots are raw, washed and peeled, 100% natural, and free from chemical additives and gluten. Described as crunchy, they can be consumed as an aperitif, to prepare salads and juices or in sophisticated dishes.

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

Profi Chicken Flavoured Food Seasoning (Romania)

Profi Baza pentru Mancaruri cu Gust de Gaina (Chicken Flavoured Food Seasoning) is now available. The product is rich in vitamins A, B1, B2 and E and is suitable for preparing all types of food, with or without meat. It retails in a 500g pack.

Claims:
NA

Flete Bolognese Stone Baked Pizza (Spain)

Flete Pizza al Horno de Piedra Boloñesa (Bolognese Stone Baked Pizza) is now available. The product retails in a 400g pack.

Claims:
NA

Asda Good & Balanced Carrot, Coriander & Quinoa Soup (UK)

Asda Good & Balanced Carrot, Coriander & Quinoa Soup is a source of fibre and protein and provides one of the five a day per serving. This vegetarian soup comprises carrot, coriander and quinoa soup with cannellini beans and a generous pinch of nutmeg. The microwavable product contains no artificial colours, flavours or hydrogenated fat, and retails in a recyclable 400g pack.

Claims:
No Additives/Preservatives, Low/No/Reduced Sodium, High/Added Fiber, Ethical - Environmentally Friendly Package, Low/No/Reduced Fat, Microwaveable, High Protein, Low/No/Reduced Transfat, Vegetarian

Source: Mintel (2015)

Top Australian Carrot Launches:
L3M (May – July 2015)

Birds Eye Seasoned Sides Garden Medley Potato Wedges with Oil & Garlic

Vegeta Delight Vegetable Stock

Maggie Beer Vegetable Stock

Yes To Carrots Scalp Relief Shampoo

Perfecto Cocktail Tasty BBQ Chicken Kebabs

Annabel Karmel Perfect Chicken & Potato Pie

Local Hand Made Vietnamese Chicken Salad

Sun Rice Street Snack Chicken Satay & Rice

Chris' Down 2 Earth Spiced Roasted Carrot & Turmeric

Imperial Grain Chicken Flavoured Brown Rice Cups

RebootYourLife Red Roar Juice

Tutto Pasta Gluten Free Vegetarian Lasagna

Source: Mintel (2015)

Cauliflower.

Purchase frequency has remained stable across waves, with consumption up this month.

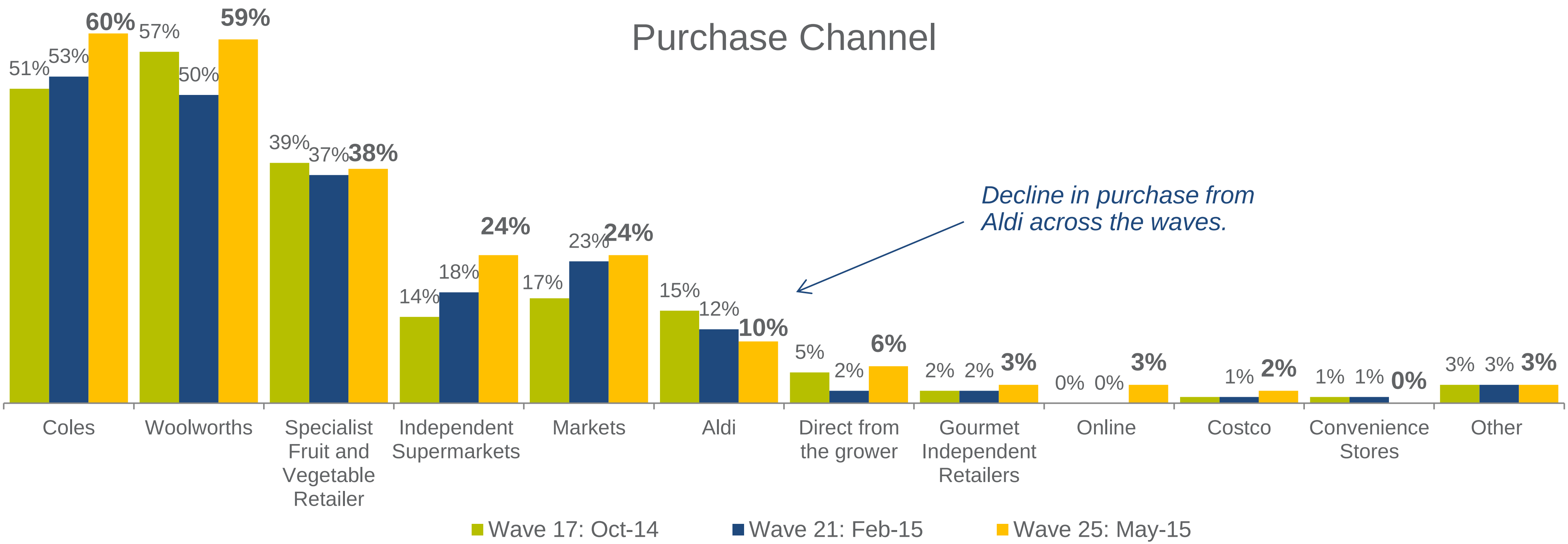
Cauliflower is typically purchased from mainstream retailers, Coles and Woolworths. However, there has been an increase in purchase from specialist retailers and markets across waves.

Average Purchase **3.2** times per month

▲ 3.4 times, Wave 17
▬ 3.2 times, Wave 21

Average Consumption **8.6** times per month

▲ 9.0 times, Wave 17
▼ 7.8 times, Wave 21



Q1. On average, how often do you purchase cauliflower?
Q2. On average, how often do you consume cauliflower?
Q5. From which of the following channels do you typically purchase cauliflower?
Sample Wave 17 N=302, Wave 21 N=310, Wave 25 N=305

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

Despite a perceived increase in spend and purchase weight, value for money has remained relatively stable across waves.

Average weight of purchase

The typical consumer purchases **1.0kg** of cauliflower, marginally higher than the past wave.

▲ 1.1kg, Wave 17
▼ 0.9kg, Wave 21

Recalled last spend

Recalled last spend on cauliflower is **$3.50,** slightly higher than previous months.

▼ $3.10, Wave 17
▼ $3.30, Wave 21

Value for money

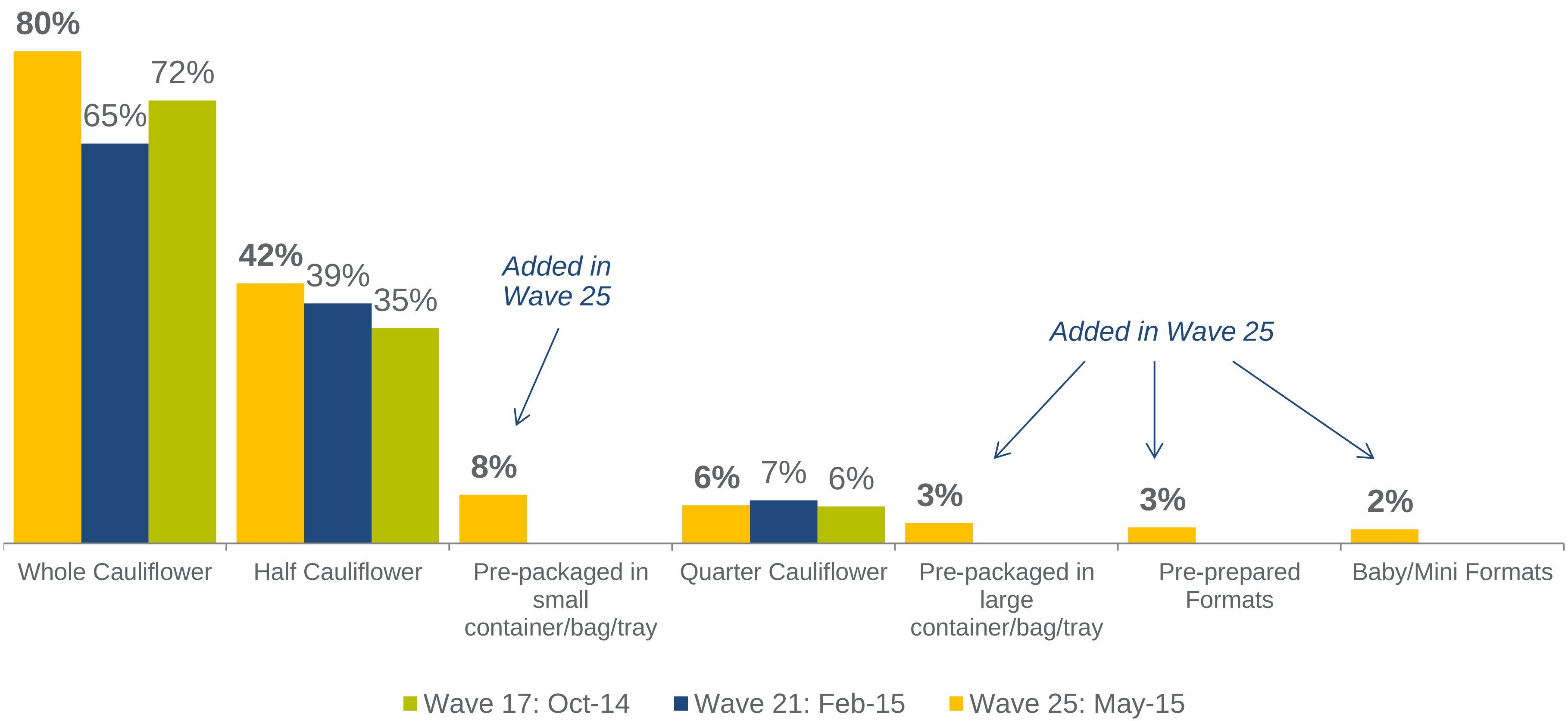
Consumers' perceived value for money is fair **(6.0/10).** Value for money is lower than past months.

▲ 6.1/10, Wave 17
▲ 6.1/10, Wave 21

Q3. How much cauliflower do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? 0-10 scale
Sample Wave 17 N=302, Wave 21 N=310, Wave 25 N=305

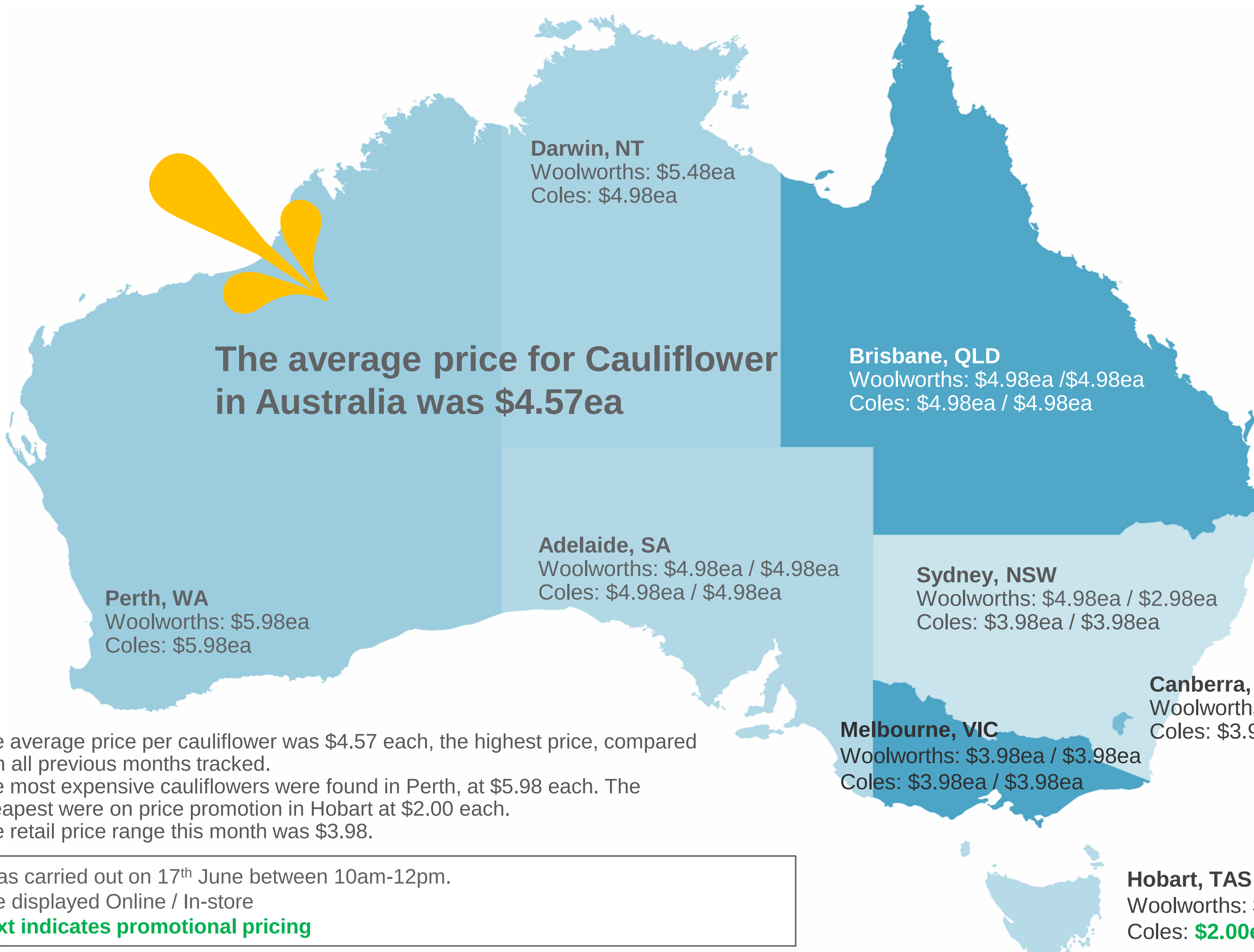
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Whole heads of cauliflower continue to be the main format purchased, with half cauliflowers also increasing as a popular format option.



Q4b. In what fresh formats do you typically purchase cauliflower?
Sample Wave 17 N=302, Wave 21 N=310, Wave 25 N=305

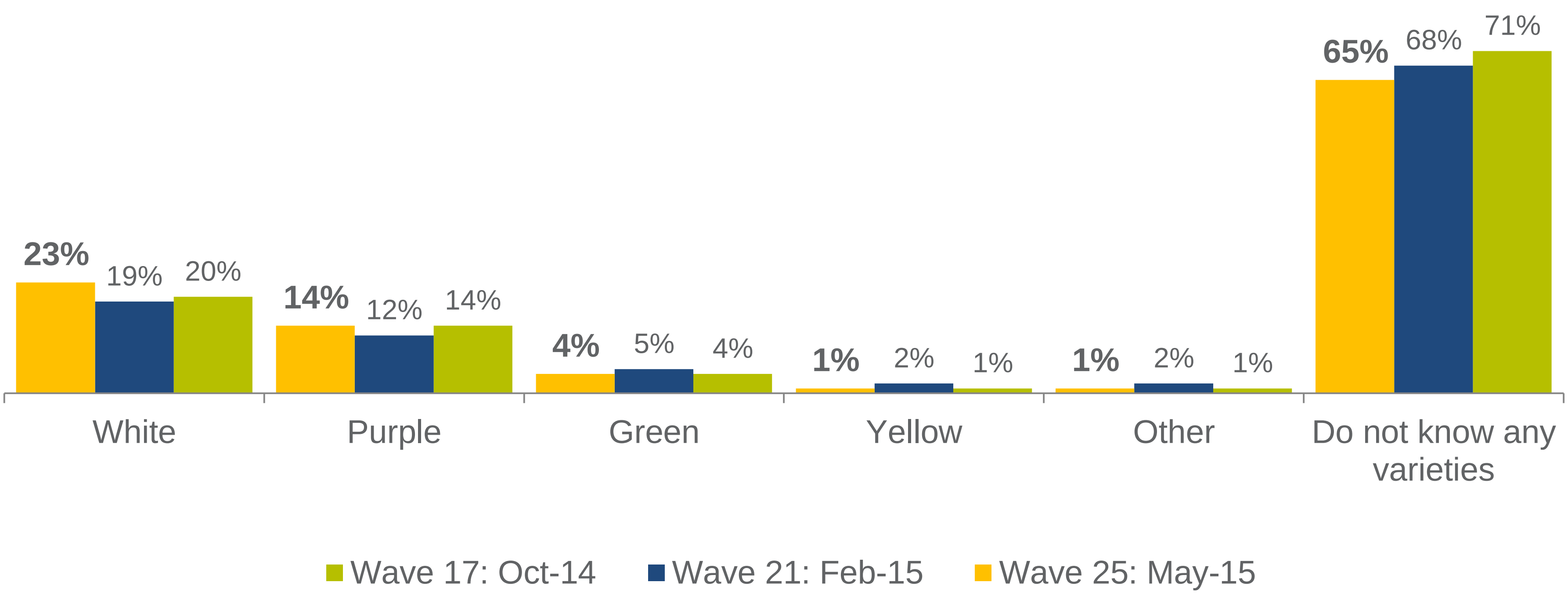
Online and In-store Commodity Prices



- The average price per cauliflower was $4.57 each, the highest price, compared with all previous months tracked.
- The most expensive cauliflowers were found in Perth, at $5.98 each. The cheapest were on price promotion in Hobart at $2.00 each.
- The retail price range this month was $3.98.

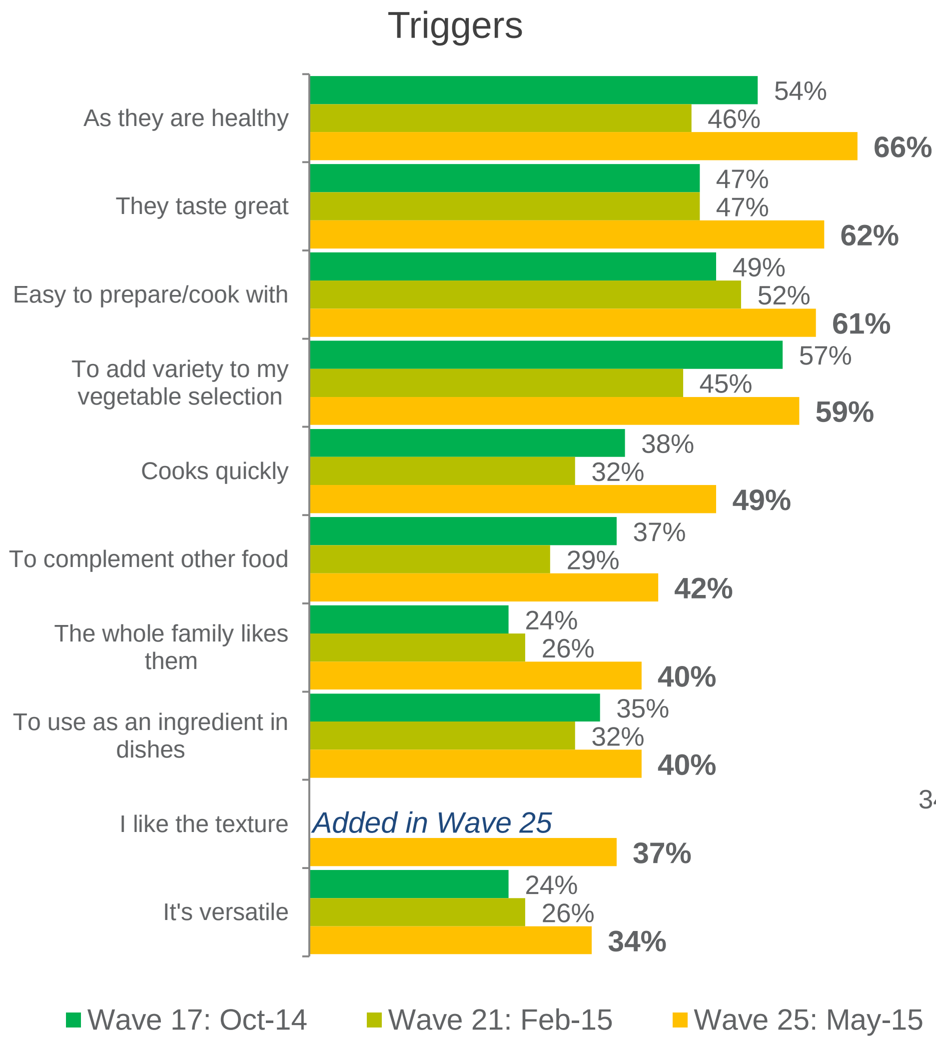
Pricing was carried out on 17th June between 10am-12pm.
Prices are displayed Online / In-store
Green text indicates promotional pricing

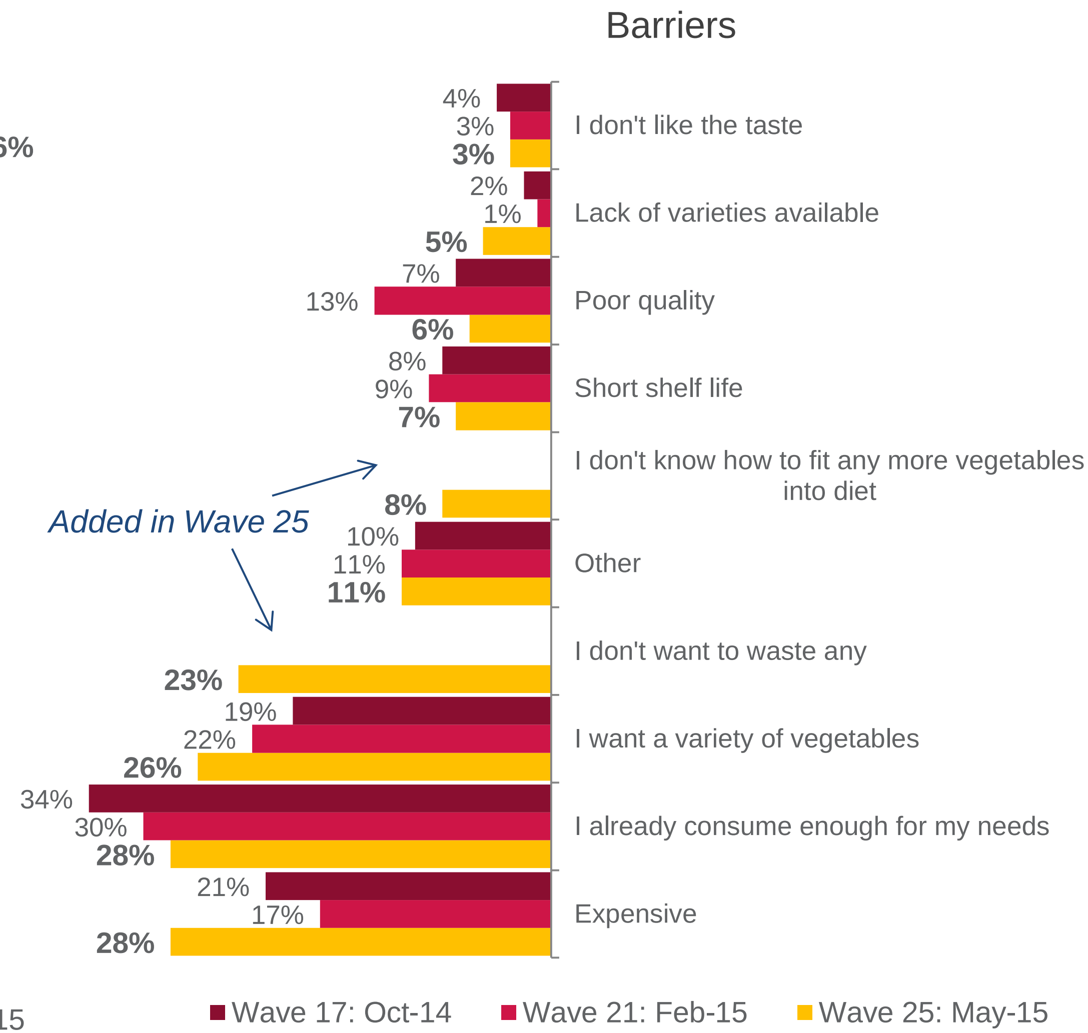
Spontaneous recall remains very low, however consumers are more likely to recall white and purple types compared to the last wave.



Q6a. What varieties of cauliflower are you aware of? (unprompted)
Sample Wave 17 N=302, Wave 21 N=310, Wave 25 N=305

There was an overall increase in triggers to purchase this month. Health and taste are the primary influences on purchase. Perception of being too expensive had a noticeable increase this month and was a key barrier inhibiting purchase.





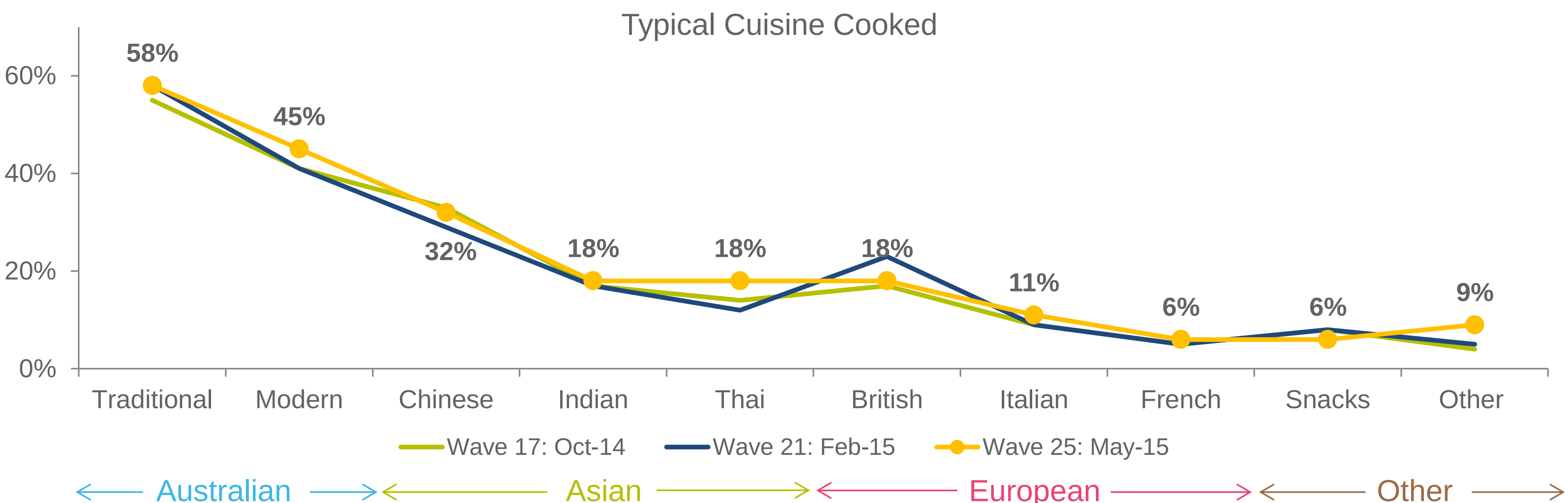
Q7. Which of the following reasons best describes why you purchase cauliflower?
Q8. Which reason best describes why you don't buy cauliflower more often?
Sample Wave 17 N=302, Wave 21 N=310, Wave 25 N=305

Consumers prefer to use cauliflower in Australian and Asian cuisine.

Dinners and family meals are the key meal occasions.

Top 5 Consumption Occasions

	Wave 25
Dinner	81%
Family Meals	64%
Weekday Meals	50%
Weekend Meals	43%
Quick Meals	32%



Q10. What cuisines do you cook/consume that use cauliflower?
Q11. Which of the following occasions do you typically consume/use cauliflower?
Sample Wave 17 N=302, Wave 21 N=310, Wave 25 N=305

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

Cauliflower is generally steamed, cooked in stir fries and boiled. The last three waves have seen a steady increase in soup, most likely due to seasonal changes.

Carrots and potatoes are consistently served with cauliflower.

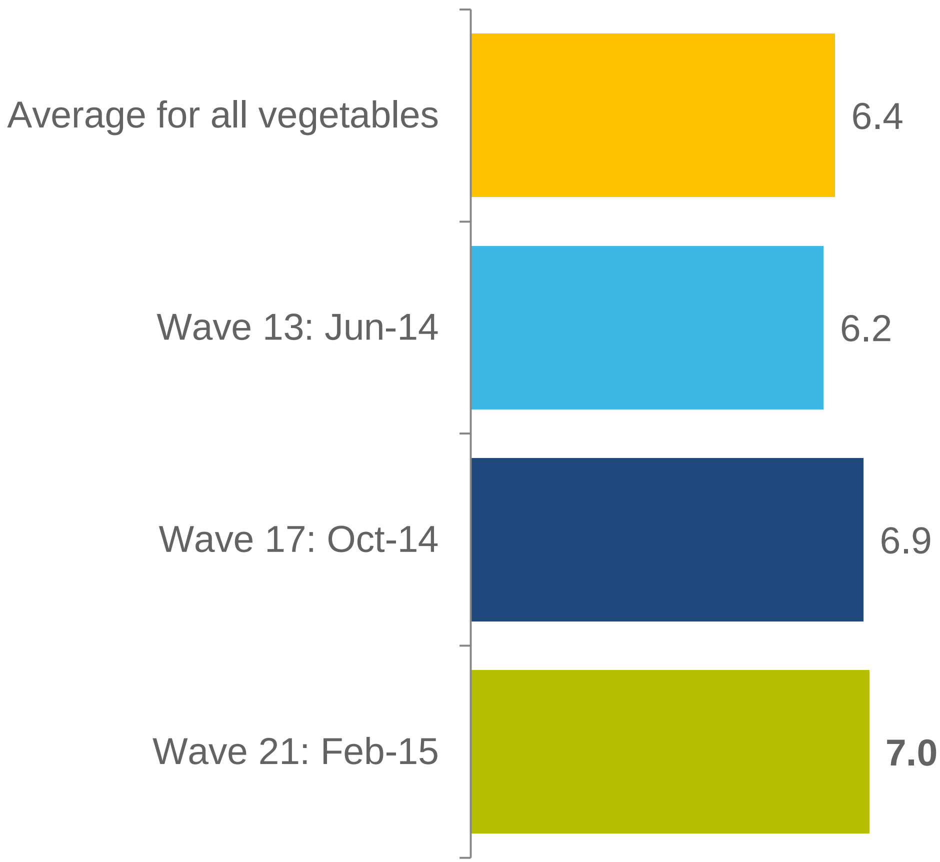
Accompanying Vegetables

Carrot	63% ▲
Potato	61% ▲
Broccoli	56% ▲
Pumpkin	36% ▲
Green Peas	29% ▲

Top 10 Cooking Styles			
	Wave 17	Wave 21	Wave 25
Steaming	60%	56%	61%
Stir frying	36%	38%	46%
Boiling	36%	41%	40%
Soup	19%	23%	32%
Microwave	23%	21%	21%
Baking	15%	19%	20%
Raw	11%	12%	16%
Roasting	11%	8%	14%
Stewing	11%	11%	14%
Deep Frying	4%	2%	12%

Q9. How do you typically cook cauliflower?
Q10a. And when are you serving cauliflower which of the following do you also serve together with this?
Sample Wave 17 N=302, Wave 21 N=310, Wave 25 N=305

There has been a steady increase in the importance of cauliflower provenance over the last few waves. Knowing that their cauliflower is grown in Australian is the most important provenance information to consumers.



8.4

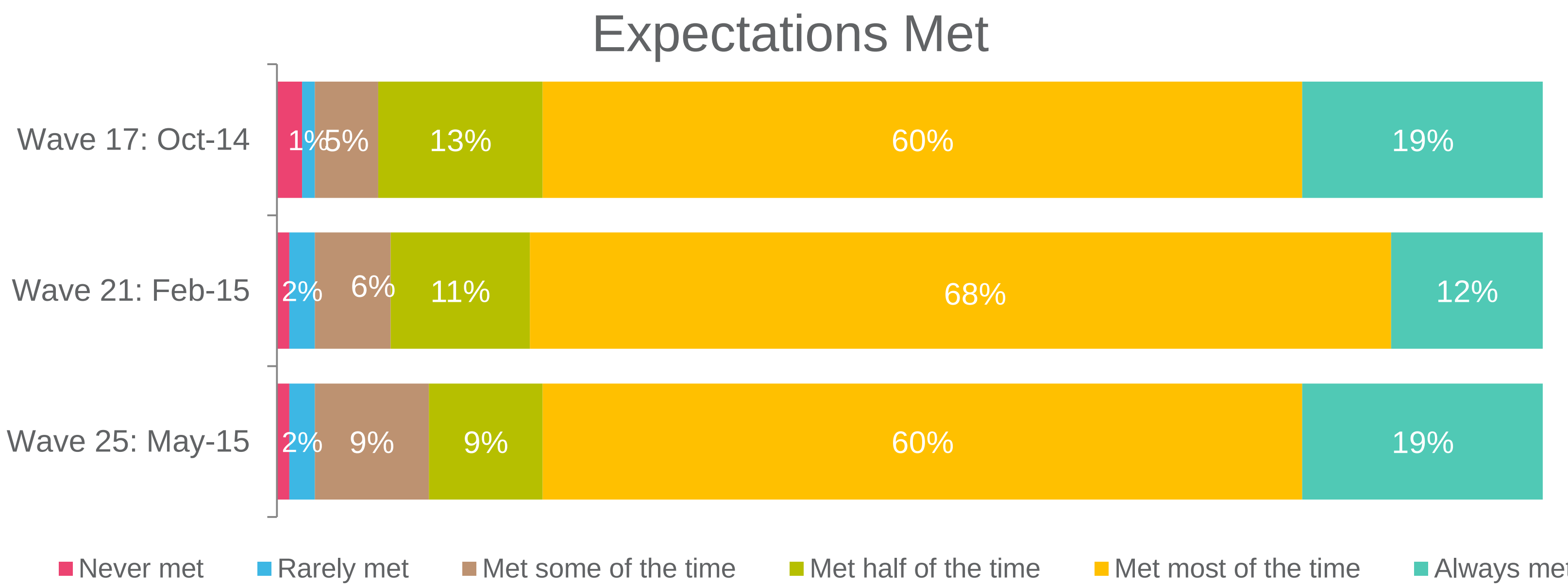
Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 17 N=302, Wave 21 N=310, Wave 25 N=305

There has been an increase in expected length of freshness once purchased.

These expectations are met most of the time and are relatively consistent with previous waves.

Expected to stay fresh for **9.4** days

▼ 8.8 days, Wave 17
▼ 8.6 days, Wave 21



Q12. How long do you expect cauliflower to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy cauliflower?
Sample Wave 17 N=302, Wave 21 N=310, Wave 25 N=305

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

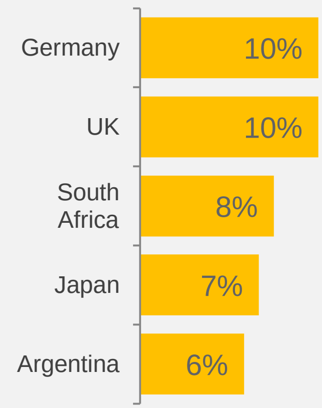
Cauliflower Product Launch Trends.

Cauliflower Global NPDs

May – July 2015

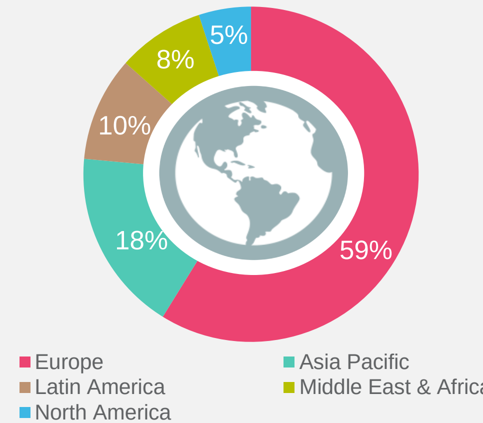
There were 119 products launched in the past three months that contained cauliflower. Europe and Asia Pacific were the main regions for launches, with Germany and UK the key countries. Flexible packaging remained the most common format. Launches were predominately in fruit and vegetable, sauces and meals categories.

Country

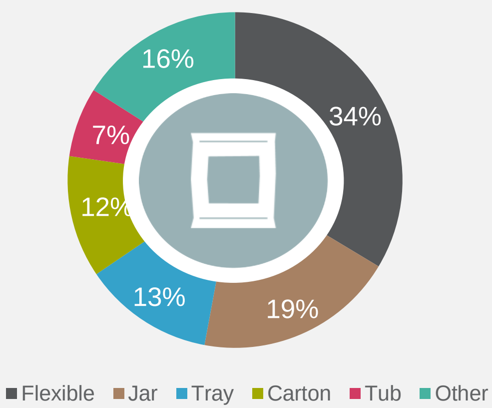


119 Global NPDs

Region



Top Pack Formats



Categories

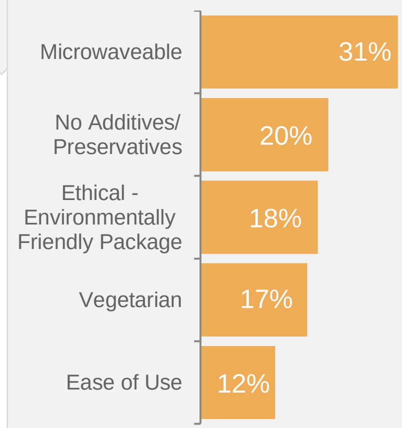
Fruit & Vegetables 36%

Sauces & Seasonings 25%

Meals & Meal Centres 18%

Soup 12%

Top Claims



Cauliflower Product Launches:
Last 3 Months (May – July 2015)
Summary

- There were 119 products launched over the past 3 months that contained cauliflower as an ingredient. This continues the upward trend of cauliflower launches in recent waves.
- There were five cauliflower products launched in Australia in the past three months.
- More than half of the products were launched in Europe (59%), with Germany and UK the key launch countries.
- Flexible (34%), jar (19%) and tray (13%) packaging were the top 3 pack formats.
- The top categories for launches were fruit and vegetables (36%), sauces and seasonings (25%), and meals and meal centres (18%).
- Convenience and health claims were typically used on products, including microwaveable (31%) and “no-added” (20%), environmentally friendly packaging (18%). These have been consistent with all previous waves tracked for cauliflower products.
- The most innovative cauliflower launch this wave are ‘Cauli Tangles’, which are cauliflower chips. See following pages for examples of product launches.

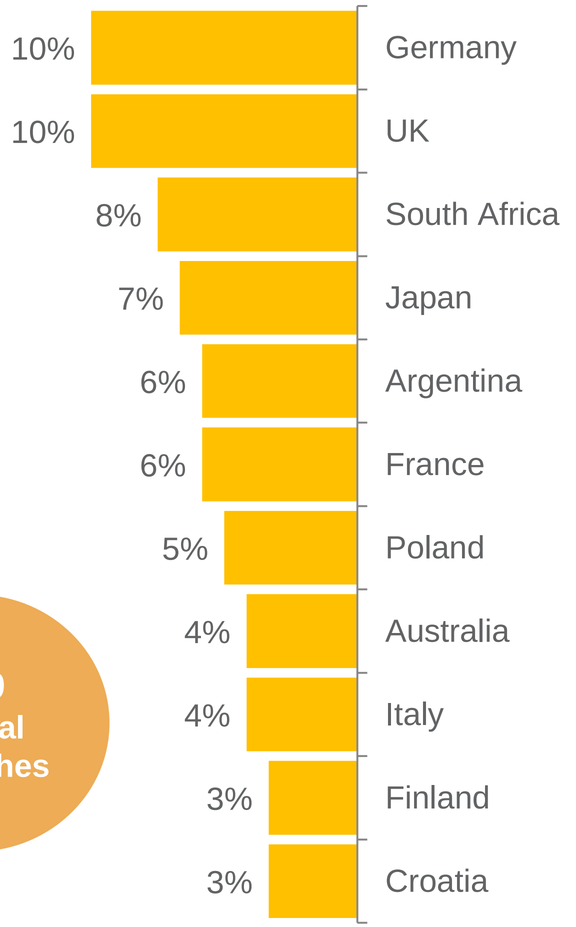
Source: Mintel (2015)

Cauliflower Launches

Country, Region & Categories

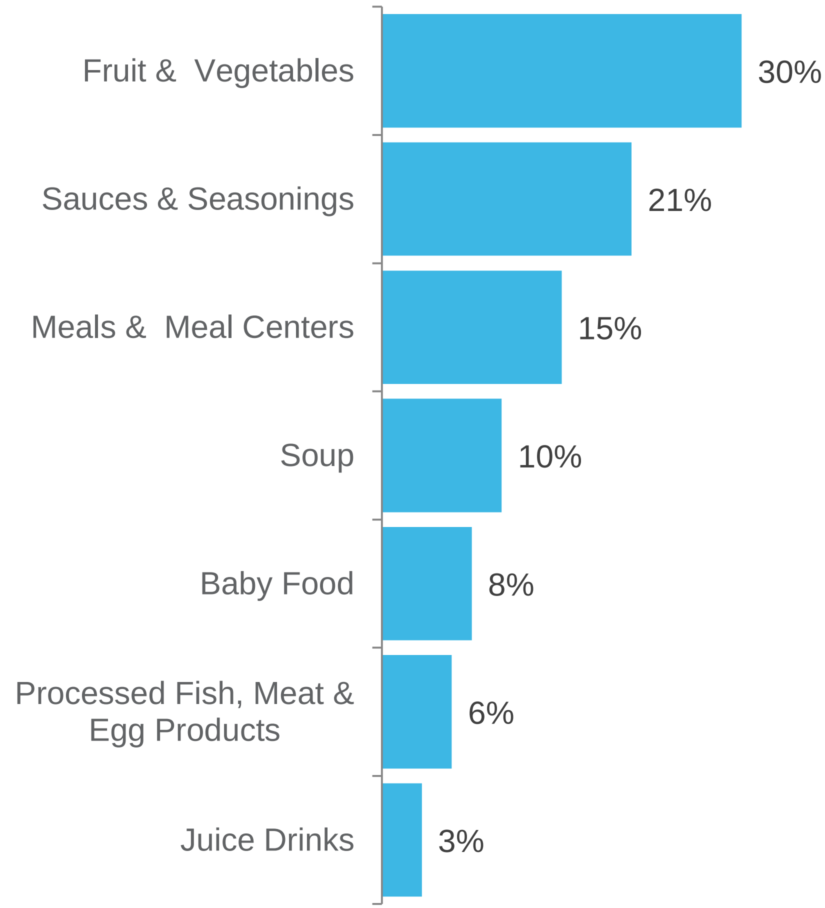
- The key three countries for cauliflower launches and innovation were[79] Germany, UK and South Africa.
- Products containing cauliflower were launched across multiple categories including fruit and vegetables, sauces and meals.

Top Launch Countries



119 Global Launches

Top Launch Categories



Number of Global Cauliflower NPDs for the L3M N=119

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Cauliflower Launches
Top Claims & Pack Formats Used

- Flexible packaging was the predominant format type for products launched in the last three months. Cartons, trays and jars were also common formats.
- Microwaveable was the key claim this wave, with no additives/preservatives and environmentally friendly packaging also popular claims.

Pack Formats Used

Global	Flexible	34%
	Jar	19%
	Tray	13%
Europe	Flexible	39%
	Carton	16%
	Tray	16%

Top Claims Used

Global	Microwaveable	31%
	No Additives/Preservatives	20%
	Ethical - Environmentally Friendly Package	18%
Europe	Microwaveable	20%
	Ethical - Environmentally Friendly Package	16%
	No Additives/Preservatives	15%

Number of Global Cauliflower NPDs for the L3M N=119
Only shown for Global and Europe as sample (other regions sample size for launches were N<30)

Innovative Cauliflower Launches:

L3M (May – July 2015)

Picard 15 Vegetables for Minestrone Soup (Italy)

Picard 15 Verdure per Minestrone (15 Vegetables for Minestrone Soup) feature a rich selection of Italian vegetables with parsley and basil. The product can be pressure-cooked in ten minutes or boiled in 25 to 30 minutes, and retails in a 1kg pack that provides four portions.

Claims:
NA

Naked Locals Hawke's Bay Cauliflower & Leek Soup with Vintage Cheddar (New Zealand)

The microwavable product is made using the freshest premium ingredients. According to the manufacturer, they source the key ingredients from the local region in New Zealand all year round, means purchasing this product is good for local NZ farmers. The company is claimed to support Oxfam and the contribution goes towards supporting sustainable farming. The vegetarian soup is free from gluten, preservatives, artificial colours or flavours, and retails in a 500g pack.

Claims:
Vegetarian, Ethical - Environmentally Friendly Package, Microwaveable

Cow & Gate Baby Cauliflower Cheese (Malaysia)

Cow & Gate Baby Cauliflower Cheese is suitable for babies from the age of four to six months onwards. It is said to provide complete care, and contains baby-grade ingredients. The sterilised, microwavable product contains puréed cauliflower and cheese, and is free from gluten, artificial colours, preservatives and added egg. It is suitable for vegetarians, and retails in a 125g jar.

Claims:
Low/No/Reduced Lactose, No Additives/Preservatives, Low/No/Reduced Allergen, Microwaveable, Gluten-Free, Low/No/Reduced Sodium, Vegetarian, Babies & Toddlers (0-4)

Frosta Cream Spring Vegetables with Wild Garlic and Creme Fraiche (Germany)

Frosta Cream Spring Vegetables with Wild Garlic and Creme Fraiche are free from flavour enhancers, colourings, flavourings, emulsifiers, stabilisers and chemically modified starches. This lacto-vegetarian, microwaveable product is said to be easy to portion. It contains 100% natural ingredients including vegetables from the Elb Valley and Lommatzsch. The product can be cooked in nine minutes and retails in a 450g pack. The company has a determined carbon footprint.

Claims:
No Additives/Preservatives, All Natural Product, Ethical - Environmentally Friendly Product, Portionability, Ease of Use, Vegetarian, Microwaveable

Source: Mintel (2015)

Innovative Cauliflower Launches:
L3M (May – July 2015)

Verdifresh Three Vegetables Mix (Spain)

Verdifresh Mix de 3 Verduras (Three Vegetables Mix) has been repackaged. This fresh and washed mix of broccoli, carrot, and cauliflower can be enjoyed as a side, is an ideal accompaniment to meats and fish, and retails in a new 300g pack designed for microwave cooking.

Claims:
Microwaveable

Iceland Broccoli & Cauliflower Creamy Gratins (Iceland)

Iceland Broccoli & Cauliflower Creamy Gratins consist of slices of broccoli and cauliflower in a creamy Emmental cheese sauce. The product is suitable for vegetarians and retails in a recyclable 480g pack containing four units.

Claims:
Vegetarian, Ethical - Environmentally Friendly Package, Microwaveable

Silver Oaks Foods Cauli Tangles (India)

Silver Oaks Foods Cauli Tangles are suitable for vegetarians. The product retails in a 100g pack, featuring a Facebook link.

Claims:
Social Media, Vegetarian

Miratorg Vitamin Selected Cauliflower (Russia)

Miratorg Vitamin Selected Cauliflower has been repackaged in an economical family pack. According to the manufacturer, cauliflower strengthens blood vessels and bone tissue, cleanses the blood, normalises metabolism, improves the immune system and body resistance, and contains enzymes that feature anti-ageing properties and help detoxify the body and remove harmful substances. This premium, 100% natural cauliflower is quick frozen straight after harvesting to preserve all the vitamins, and is quick and easy to prepare.

Claims:
All Natural Product, Other (Functional), Immune System (Functional), Time/Speed, Economy, Ease of Use, Antioxidant, Anti-Ageing, Microwaveable, Premium, Cardiovascular (Functional), Digestive (Functional), Bone Health

Source: Mintel (2015)

Innovative Cauliflower Launches:

L3M (May – July 2015)

Knorr Cup a Soup Broccoli & Cauliflower Soup (Denmark)

Knorr Cup a Soup Blomkål og Broccolisuppe (Broccoli & Cauliflower Soup) is ideal for lunch break or any time at home or at work. The manufacturer claims to support sustainable farming. The product retails in a 3 x 15g pack, containing three portions.

Claims:

Ethical - Environmentally Friendly Product

Woolworths Food Fresh Roasted Pumpkin, Cauliflower Rice & Chicken (South Africa)

Woolworths Food Fresh Roasted Pumpkin, Cauliflower Rice & Chicken contains wholegrain mustard cheese sauce and is ideal for carb conscious consumers. The microwaveable product is best eaten hot and retails in a partially recyclable 325g pack.

Claims:

No Additives/Preservatives, Low/No/Reduced Carb, Ethical - Environmentally Friendly Package, Microwaveable, Ease of Use, Wholegrain

Raviollo Breaded Cauliflower (Russia)

The product is made with selected vegetables and can be prepared in a microwave in three minutes, or in a frying pan in five minutes. It is suitable for vegetarians, free from GMO and provides only 78 calories. This fully cooked product retails in a 320g pack.

Claims:

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

Blédina Mes Amis Légumes Cauliflower, Potatoes & Beef (France)

The vegetables have been steam cooked and have a preserved flavour and adapted lumpy texture. They are free from colourings, preservatives and flavourings, and can be heated in a microwave or bain-marie. This product is suitable for babies from 12 months of age and now retails in a new 190g pack that provides one complete meal.

Claims:

No Additives/Preservatives, Babies & Toddlers (0-4), Microwaveable

Source: Mintel (2015)

Top Australian Cauliflower Launches:
L3M (May – July 2015)

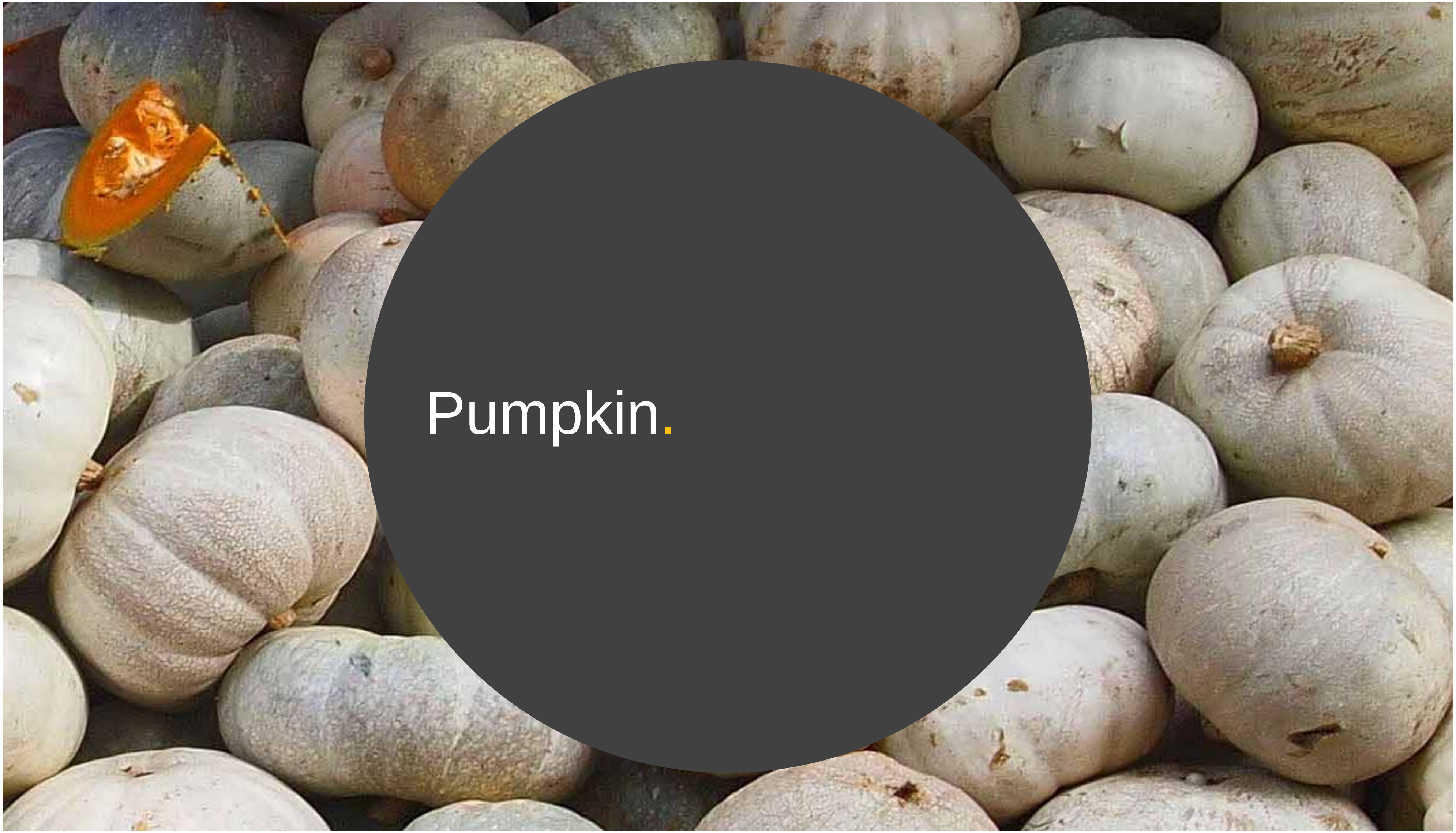
Birds Eye Seasoned Sides Garden Medley Potato Wedges with Oil & Garlic

Garlo's Pies Lamb & Rosemary Pie

Yarra Valley Preserves Piccalilli Pickle

Birds Eye Steam Fresh Cauliflower with Cheese Sauce

Source: Mintel (2015)



Pumpkin.

Consumption and purchase frequency are both slightly higher this month.

Pumpkin is generally purchased from mainstream retailers, with a declining trend in purchase from markets.

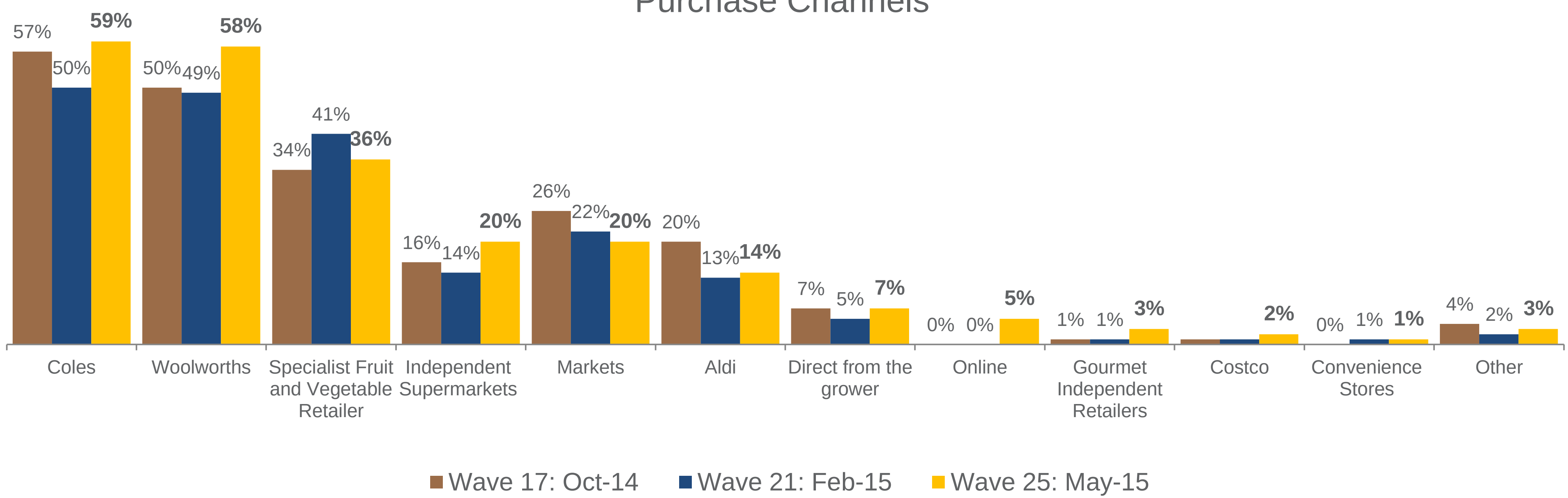
Average Purchase **3.2** times per month

- ▼ 3.1 times, Wave 17
- ▼ 3.0 times, Wave 21

Average Consumption **8.7** times per month

- ▲ 9.1 times, Wave 17
- ▼ 8.3 times, Wave 21

Purchase Channels



Q1. On average, how often do you purchase pumpkin?
Q2. On average, how often do you consume pumpkin?
Q5. From which of the following channels do you typically purchase pumpkin?
Sample Wave 17 N=302, Wave 21 N=311, Wave 25 N=304

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

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

Average weight of purchase

The average consumer typically purchases **1.4kg** of pumpkin, returning to the average in October 2014.

— 1.4kg, Wave 17
▼ 1.3kg, Wave 21

Recalled last spend

Recalled last spend on pumpkin is **$3.20**, marginally lower compared to previous waves.

▲ $3.30 Wave 17
▲ $3.30, Wave 21

Value for money

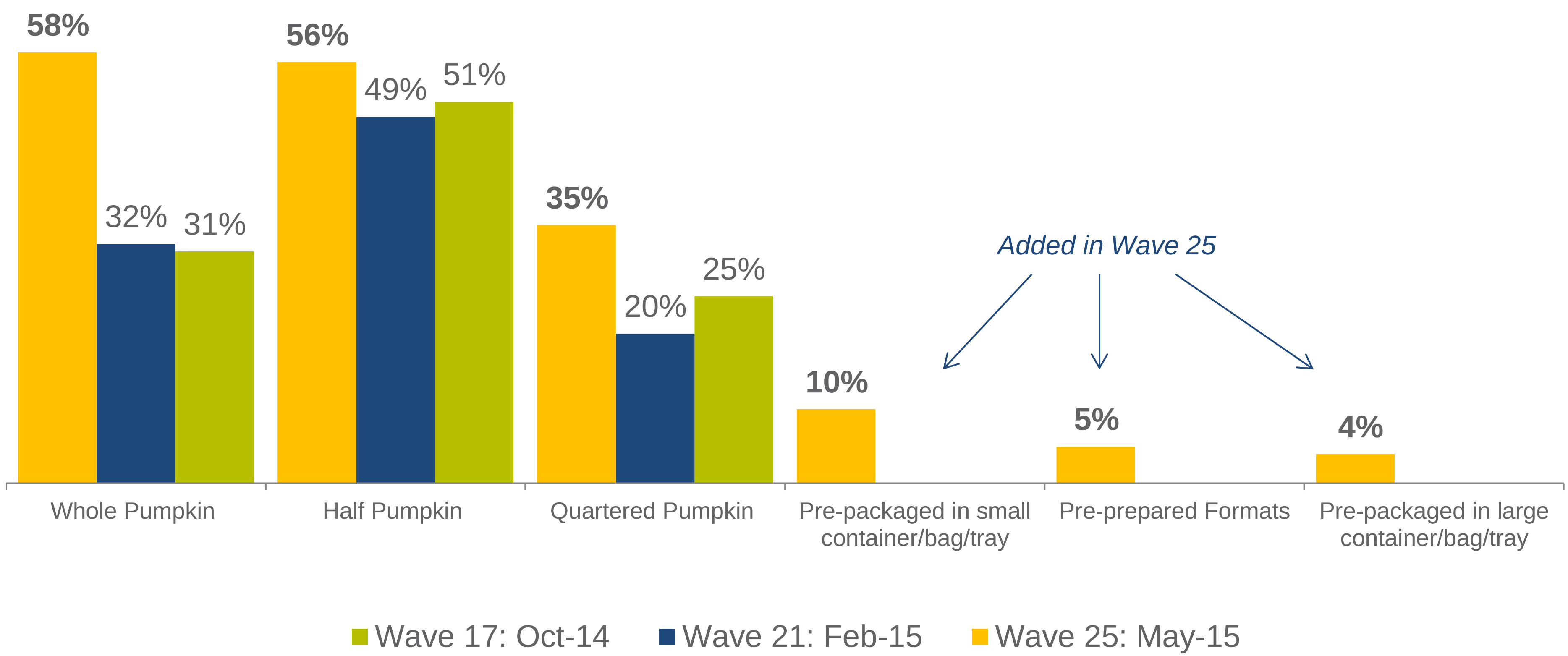
Consumers' perceived value for money is relatively high **(7.2/10)**, which has improved since the last wave.

▼ 6.8/10, Wave 17
▼ 6.8/10, Wave 21

Q3. How much pumpkin do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 17 N=302, Wave 21 N=311, Wave 25 N=304

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

Whole pumpkins are the most commonly purchased format, with a noticeable increase in popularity this month. Half and quarter formats are also typically purchased by consumers.



Q4b. In what fresh formats do you typically purchase Pumpkin?
Sample Wave 17 N=302, Wave 21 N=311, Wave 25 N=304

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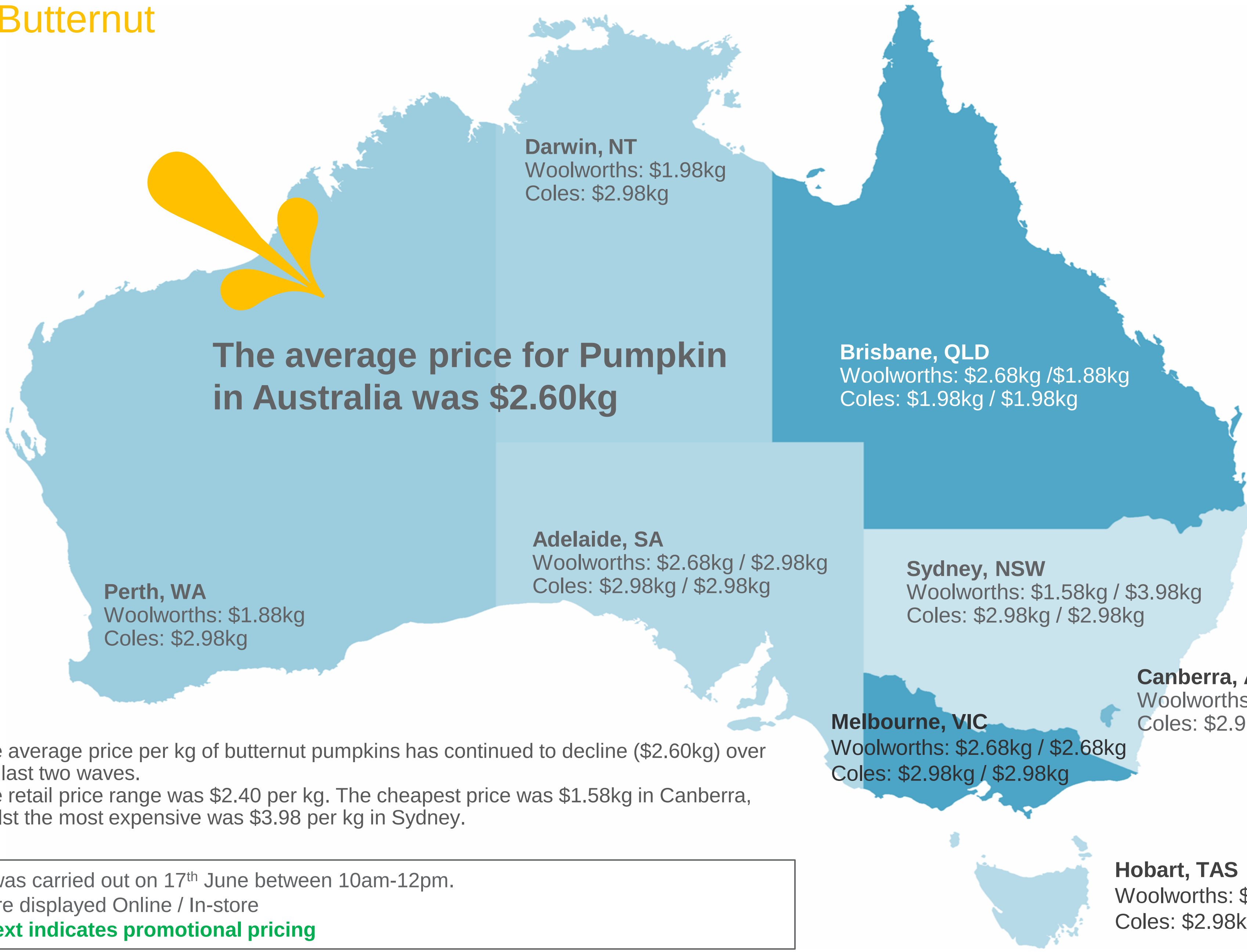
Online and In-store Commodity Prices

Butternut

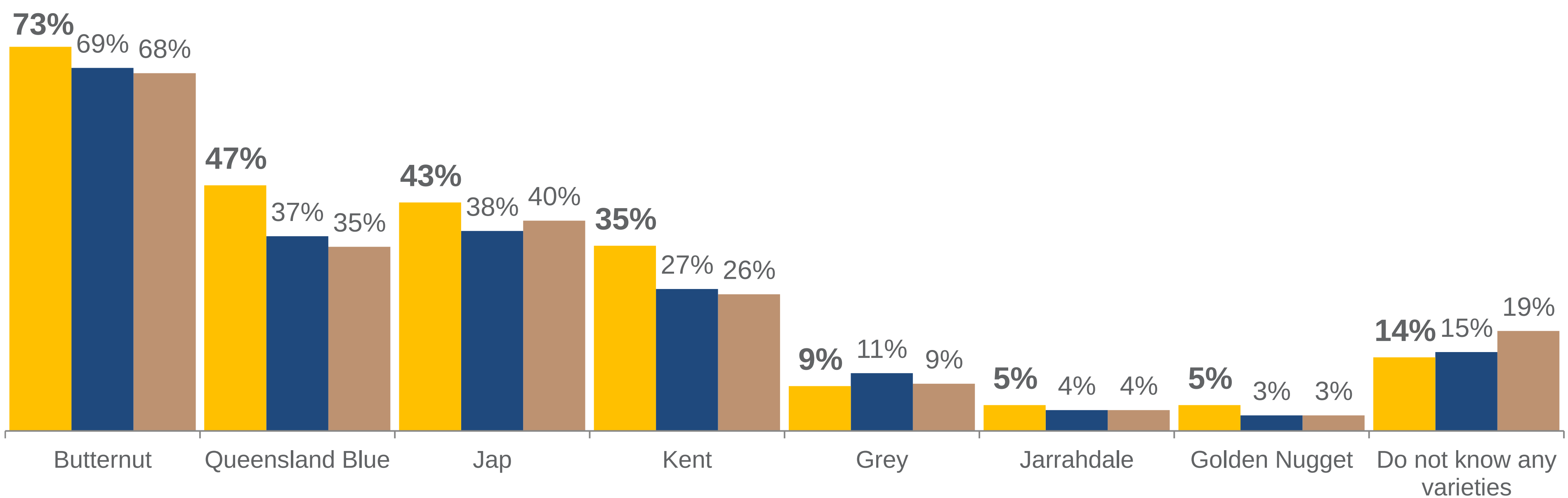


- The average price per kg of butternut pumpkins has continued to decline ($2.60kg) over the last two waves.
- The retail price range was $2.40 per kg. The cheapest price was $1.58kg in Canberra, whilst the most expensive was $3.98 per kg in Sydney.

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

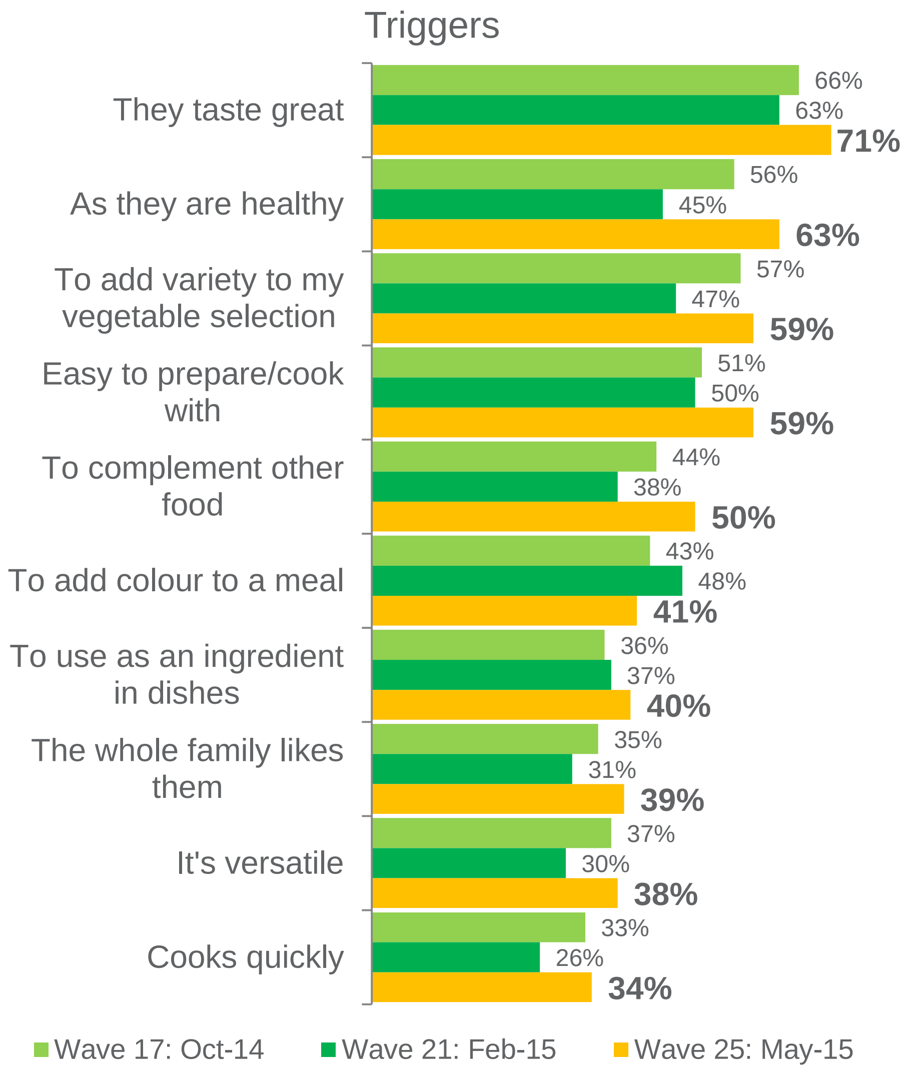
Spontaneous awareness of pumpkin types remains high, with positive recall across multiple types of pumpkin.

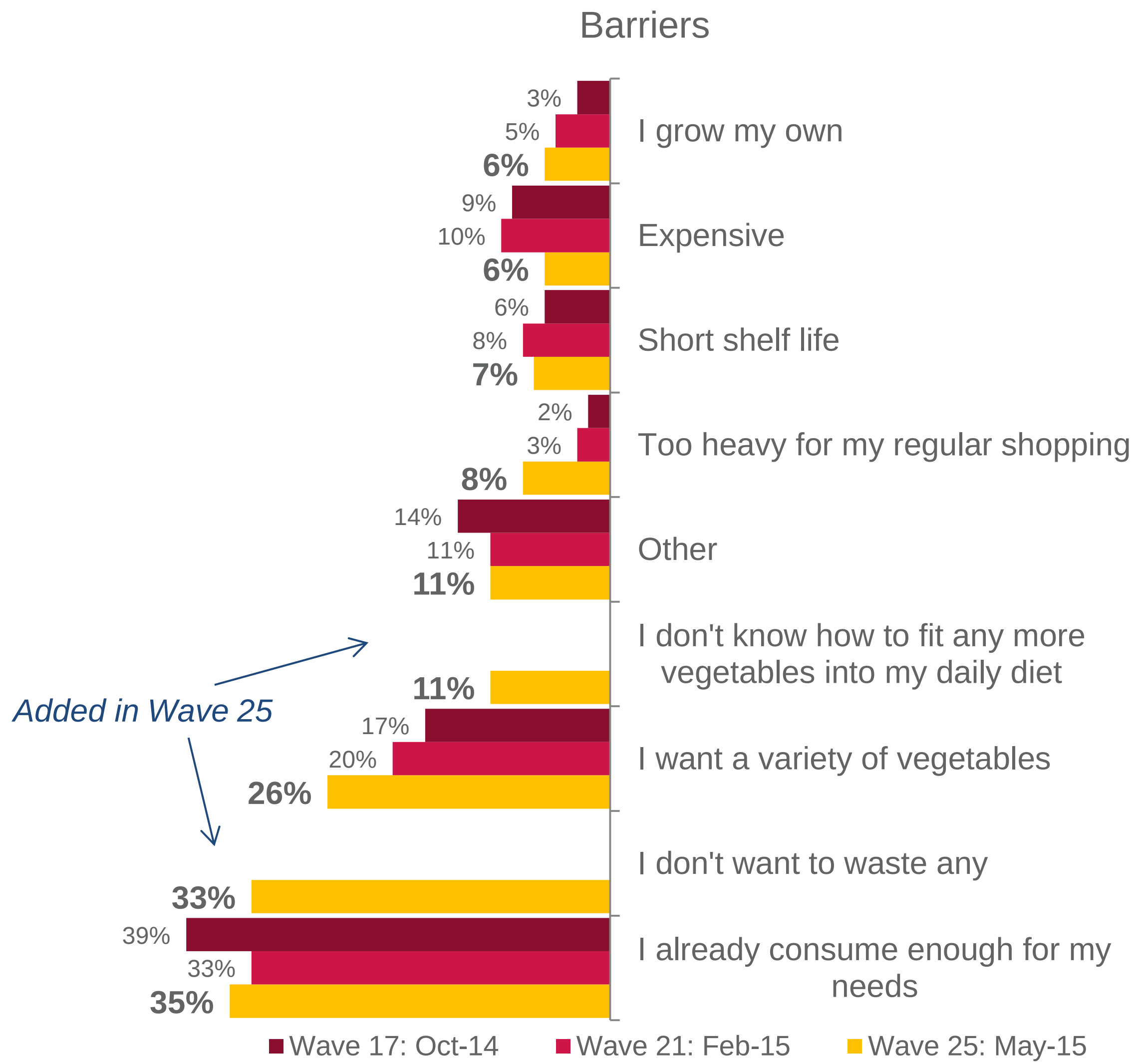
Awareness of Queensland Blue and Jap pumpkin have steadily increased across waves.



Q6a. What varieties of pumpkin are you aware of? (unprompted)
Sample Wave 17 N=302, Wave 21 N=311, Wave 25 N=304

Taste and health are the key drivers of pumpkin purchase, with the latter substantially increasing this wave. Perceptions of consuming enough for needs and not wanting to waste any are the key barriers to purchase.





Q7. Which of the following reasons best describes why you purchase pumpkin?
Q8. Which reason best describes why you don't buy pumpkin more often?
Sample Wave 17 N=302, Wave 21 N=311, Wave 25 N=304

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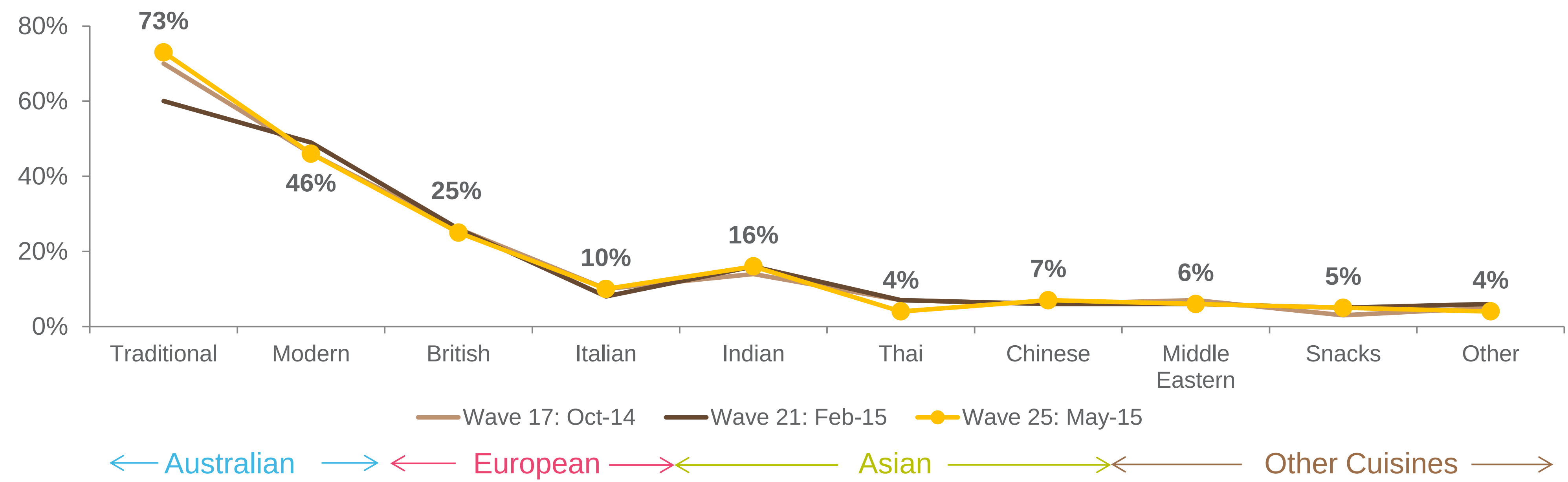
Traditional Australian cuisine remains popular for pumpkin dishes.

Meal occasions generally occur at dinner time and for family meals.

Top 5 Consumption Occasions

	Wave 25
Dinner	77%
Family Meals	67%
Weekday Meals	54%
Weekend Meals	51%
Quick Meals	22%

Typical Cuisine Cooked



Q10. What cuisines do you cook/consume that use pumpkin?
Q11. Which of the following occasions do you typically consume/use pumpkin?
Sample Wave 17 N=302, Wave 21 N=311, Wave 25 N=304

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

Consumers prefer to serve pumpkin with potatoes and carrots. Roasting remains the primary cooking style, whilst soup has seen a substantial rise, most likely due to the colder weather.

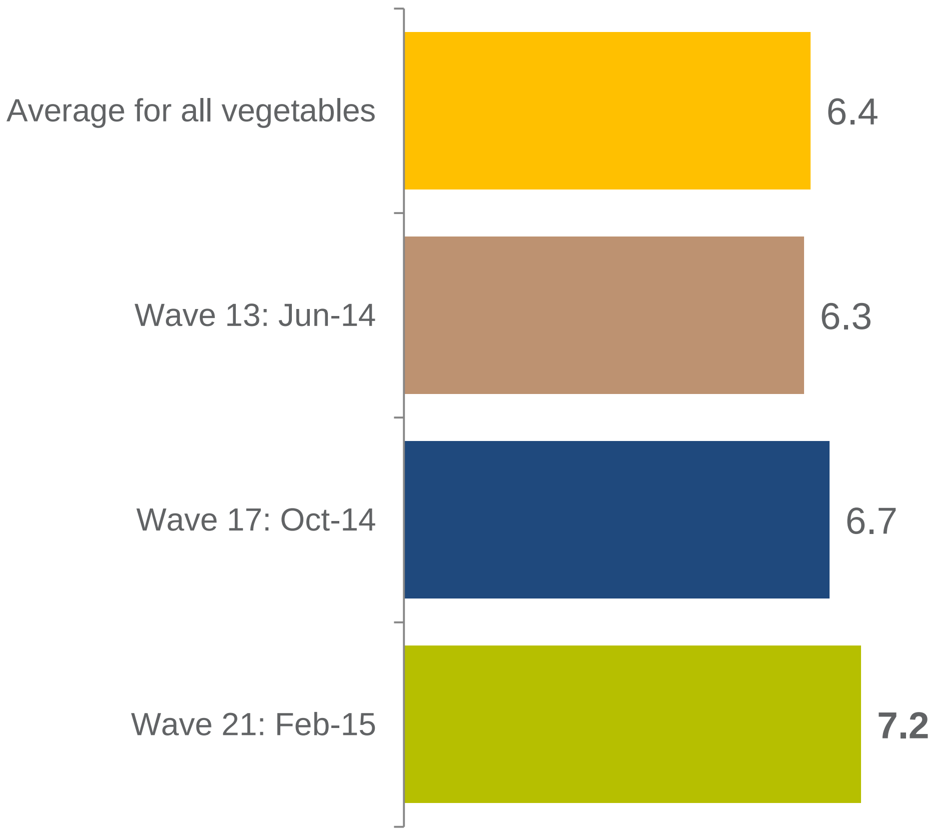
Accompanying Vegetables

Potato	77%
Carrot	58%
Broccoli	49%
Cauliflower	41%
Sweet Potato	41%

Top 10 Cooking Styles			
	Wave 17	Wave 21	Wave 25
Roasting	68%	75%	74%
Soup	46%	41%	61%
Baking	47%	43%	50%
Mashing	44%	46%	49%
Steaming	37%	36%	40%
Boiling	34%	32%	36%
Stewing	15%	17%	21%
Microwave	15%	22%	16%
Stir frying	12%	11%	9%
Deep Frying	3%	2%	8%

Q9. How do you typically cook pumpkin?
Q10a. And when are you serving pumpkin which of the following do you also serve together with this?
Sample Wave 17 N=302, Wave 21 N=311, Wave 25 N=304

There has been a noticeable increase in the importance of pumpkin provenance over the last three waves. Consumers also want to know that their pumpkin is grown in Australia.



8.5

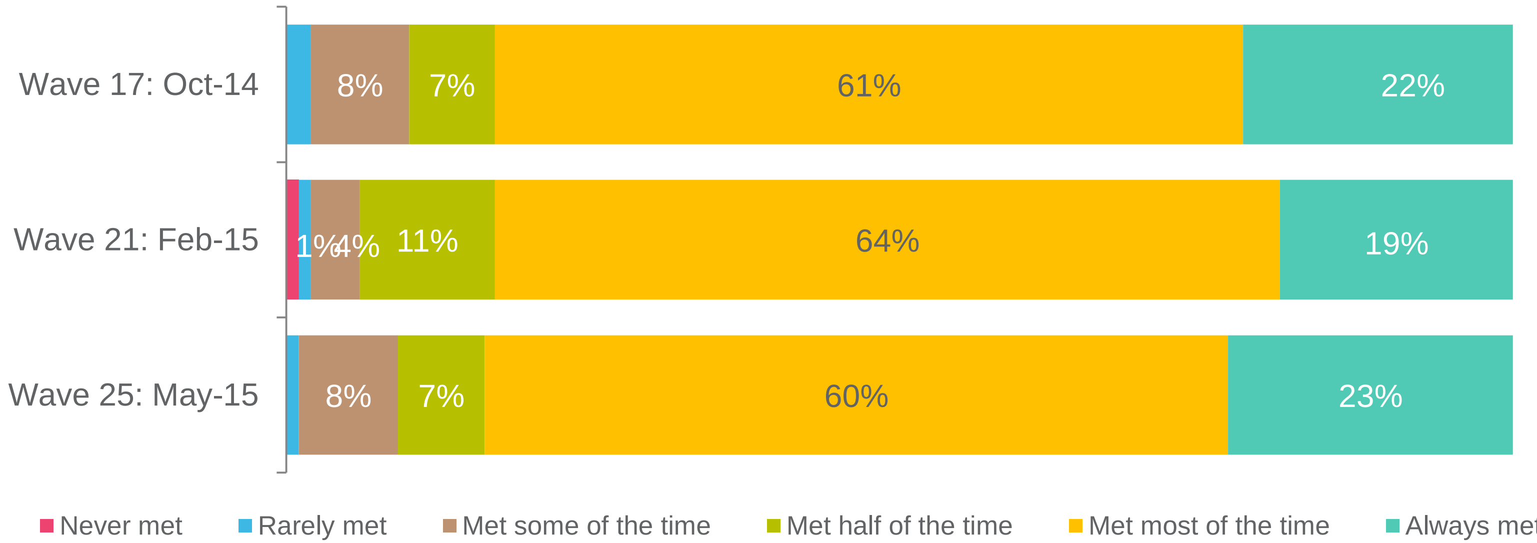
Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 17 N=302, Wave 21 N=311, Wave 25 N=304

Expectations of freshness have improved, with pumpkins expected to remain fresh for over a week. Consumer expectations are generally being met.

Expected to stay fresh for **12.5** days

▼ 12.0 days, Wave 17
▼ 11.6 days, Wave 21

Expectations Met



Q12. How long do you expect pumpkin to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy pumpkin?
Sample Wave 17 N=302, Wave 21 N=311, Wave 25 N=304

Horticulture Innovation Australia

colmar brunton.

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

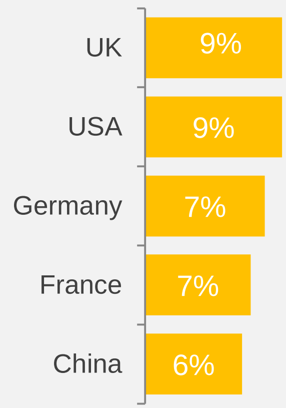
Pumpkin Product Launch Trends.

Pumpkin Global NPDs

May – July 2015

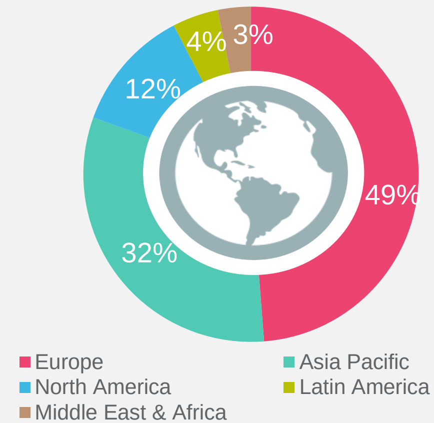
There were 564 products launched in the past three months that contained pumpkin. Europe and Asia Pacific were the main regions for launches, while UK is the key country. Flexible packaging remained the most common format. Launches were predominately in snack and bakery categories.

Country

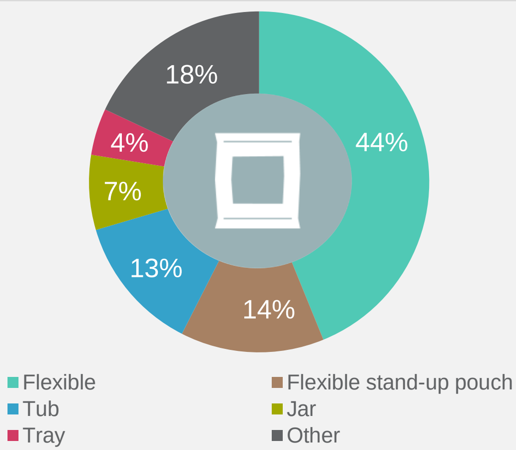


564 Global NPDs

Region



Top Pack Formats



Categories

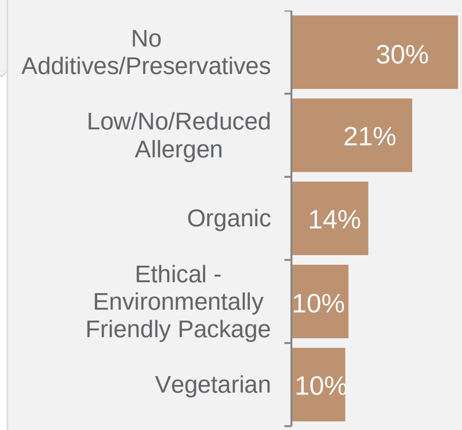
Snacks 25%

Bakery 11%

Breakfast Cereals 11%

Meals & Meal Centres 7%

Top Claims



Pumpkin Product Launches:
Last 3 Months (May – July 2015)
Summary

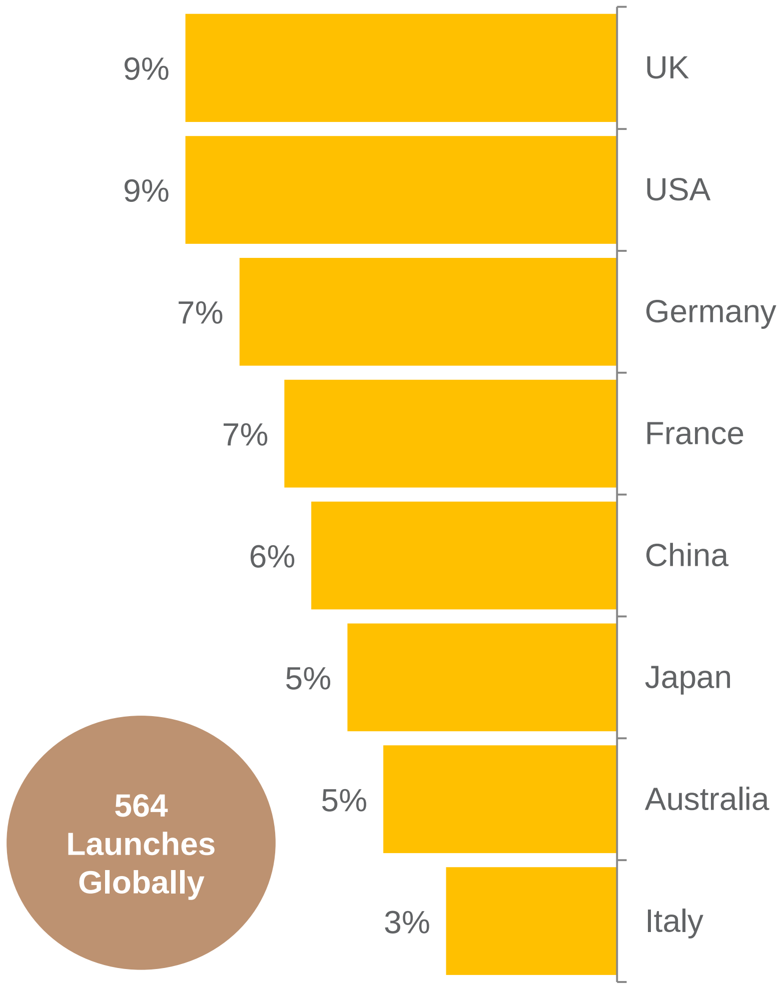
- A total of 564 products containing pumpkin as an ingredient were launched globally in the last 3 months, a slight decrease on the previous quarter.
- There were 26 pumpkin launches in Australia this quarter.
- Europe (49%) and Asia Pacific (32%) were the top regions for launches. Key countries for innovation were UK (9%), USA (9%), and Germany (7%).
- Flexible packaging (incl. stand-up pouches) continues to be the widely used format for launches (58%).
- Top categories for product launches were snacks (25%), bakery goods (11%) and breakfast cereals (11%).
- Core claims for product launches globally were based around health (e.g. no additives/preservatives 30%, low allergen 21%) and organic (14%).
- The most innovative products were green tea pumpkin seeds in China and pumpkin seed oil in Croatia (examples of products can be found at the end of the pumpkin trend report).

Source: Mintel (2015)

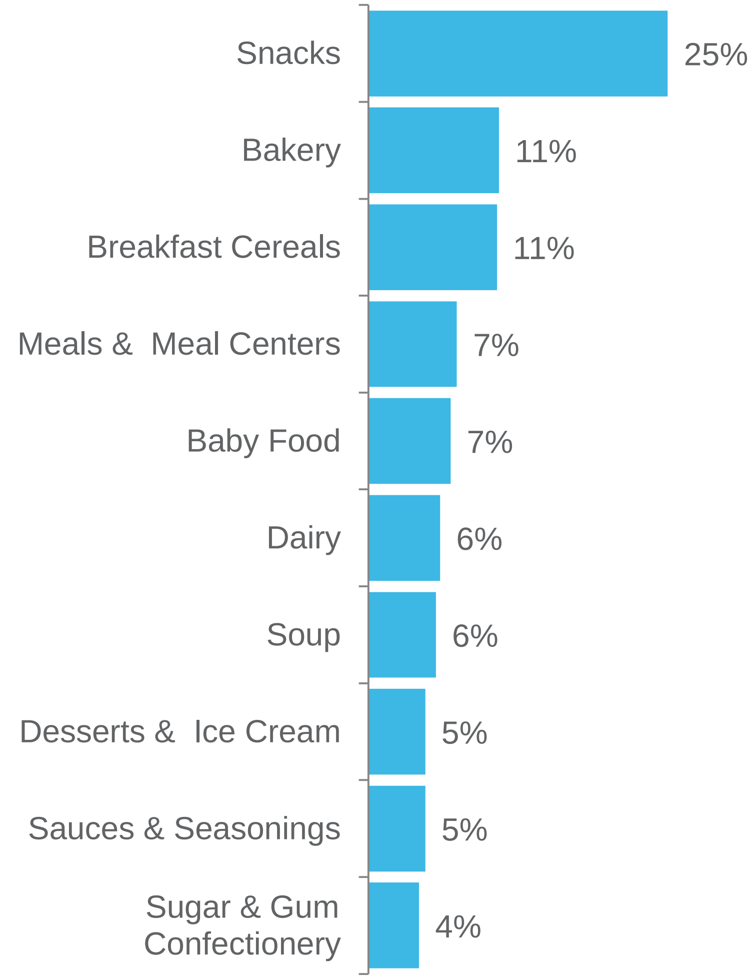
Pumpkin Launches
Country & Categories

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

Top Launch Countries



Top Launch Categories



Number of Global Pumpkin NPD for the L3M N=564

Horticulture Innovation Australia
colmar brunton.

Pumpkin Launches
Top Claims & Pack Formats Used

- Pack formats were consistent across regions, with the primary format of choice being flexible packaging.
- Health claims were most commonly used globally, with no additives being most common, while allergen free and organic were popular claims in Europe. Whereas in Asia Pacific, convenience claims such as microwaveable and ease of use were more prominent.

Pack Formats Used

Global	Flexible	44%
	Flexible stand-up pouch	14%
	Tub	13%
Europe	Flexible	49%
	Tub	20%
	Jar	7%
Asia Pacific	Flexible	39%
	Flexible stand-up pouch	18%
	Flexible sachet	9%

Top Claims Used

Global	No Additives/Preservatives	30%
	Low/No/Reduced Allergen	21%
	Organic	14%
Europe	No Additives/Preservatives	20%
	Organic	20%
	Low/No/Reduced Allergen	19%
Asia Pacific	No Additives/Preservatives	41%
	Microwaveable	20%
	Ease of Use	17%

Number of Global Pumpkin NPD for the L3M N=564
Only regions with n >30 are displayed

Innovative Pumpkin Launches:
L3M (May – July 2015)

Singluko Dietetic Pumpkin Jam (Argentina)

Singluko Mermelada Dietética de Zapallo (Dietetic Pumpkin Jam) is now available. This product is free from added sugar, is sweetened with Splenda, and contains no T.A.C.C. or gluten. In addition, it is low in calories and carbohydrates, and retails in a 360g jar.

Claims:

Cobranded, Low/No/Reduced Allergen, Low/No/Reduced Calorie, Low/No/Reduced Carb, Slimming, Low/No/Reduced Sugar, Gluten-Free

Go Raw Sprouted Pumpkin Seeds (USA)

The sprouted seeds are free from gluten, nuts, GMO, and cholesterol; are a good source of protein and iron; and contain 200mg omega-6. It is very high in protein, is low in carbohydrates and contains loads of minerals including iron, potassium, magnesium, and zinc, as well as heart-healthy niacin and vitamin B3. It multiplies powerful nutrients and unlocks enzymes to super-charge digestion and support optimal health. This USDA organic certified product is suitable for vegans, and is made with Celtic sea salt.

Claims:

Low/No/Reduced Allergen, Low/No/Reduced Cholesterol, GMO-Free, Low/No/Reduced Carb, Gluten-Free, High/Added Fiber, Vegan, High Protein, No Animal Ingredients, Ease of Use, Organic, Low/No/Reduced Sodium, Antioxidant,

HiPP Number Pasta in a Pumpkin Cream Sauce (Austria)

This microwaveable product is easy to prepare and features valuable gently steamed vegetables and a child-friendly seasoning. It is organic certified, produced with CO2 neutral energy and retails in a 250g pack, bearing the EU Green Leaf, Climate-Friendly and Claus Hipp Bio logos.

Claims:

Ethical - Environmentally Friendly Product, Microwaveable, Ease of Use, Organic, Babies & Toddlers (0-4), Carbon Neutral

Weng Cai Ji Green Tea Flavoured Pumpkin Seeds (China)

Weng Cai Ji Lv Cha Wei Nan Gua Zi (Green Tea Flavoured Pumpkin Seeds) have been repacked in a newly designed 80g pack. The snack is made with selected big and white pumpkin seeds from Northern East, China, and cooked with green tea powder from Fujian, China. This product is said to be aromatic and mellow.

Claims:

NA

Source: Mintel (2015)

Innovative Pumpkin Launches:
L3M (May – July 2015)

Lotte Good Bread LAB Sweet Pumpkin Bread (South Korea)

According to the manufacturer, being a source of beta carotene, vitamin C, dietary fibre and minerals, sweet pumpkins have a strong anti-cancer effect, prevent constipation and are good for dieting. The product retails in an 80g pack featuring the Community Chest of Korea charity logo.
.

Claims:
Ethical - Charity, Other (Functional), Slimming, Digestive (Functional)

Marks & Spencer Seeded Oatcakes with Pumpkin, Sunflower & Linseed (Czech Republic)

This crunchy oatcakes are made with pumpkin, sunflower and linseed, and are said to taste great with Cornish cruncher cheddar and a glass of Marques de Romeral Rioja Crianza. The product is a source of thiamin, which helps to release energy from food, and retails in a 200g pack featuring the Eat Well logo.

Claims:
Other (Functional)

Cow & Gate Pumpkin & Carrot with Chicken (Malaysia)

Cow & Gate Pumpkin & Carrot with Chicken is suitable for babies from four to six months onwards. It is said to provide complete care, and is a natural source of omega-3. It comprises puréed pumpkin, carrot and cream with chicken, and is free from gluten, colours, preservatives, added salt and egg. The microwavable product contains baby-grade ingredients, and retails in a 125g jar.

Claims:
Low/No/Reduced Lactose, No Additives/Preservatives, Low/No/Reduced Allergen, Microwaveable, Gluten-Free, Low/No/Reduced Sodium, Vegetarian, Babies & Toddlers (0-4)

Kalbe Milna Chicken with Pumpkin & Carrot Baby Cereal (Vietnam)

The cereal contains DHA, omega-3 and 6 as essential fatty acids; and features five nutrition sources, nine essential amino acids, 12 vitamins and 10 minerals said to support optimum growth in kids. It also contains iron claimed to prevent and overcome iron deficiency anaemia; and calcium that plays role a in bone formation and maintains bone and teeth density.

Claims:
Halal, No Additives/Preservatives, Other (Functional), Babies & Toddlers (0-4), Bone Health

Source: Mintel (2015)

Innovative Pumpkin Launches:
L3M (May – July 2015)

Aeon Topvalu Pumpkin & Sweet Potato Soup (Japan)

Aeon Topvalu Pumpkin & Sweet Potato Soup is made with domestically produced pumpkin and sweet potatoes. It retails in a 160g pack. Launched on March 25, 2015 with an RRP of 159 yen.

Claims:
Economy

Nature Valley Crunchy Pumpkin & Poppy Seeds Cereal Bars (UK)

Nature Valley Crunchy Pumpkin & Poppy Seeds Cereal Bars are made with wholegrain rolled oats, pumpkin and poppy seeds. This kosher and halal certified product is lactose free, suitable for vegetarians and contains no artificial colours or preservatives. It retails in a 210g pack containing 5 x 42g units.

Claims:
Low/No/Reduced Lactose, No Additives/Preservatives, Low/No/Reduced Allergen, Kosher, Halal, Vegetarian, Wholegrain

DimmidiSì La Sopa Fresca Carrot and Pumpkin Cream (Spain)

DimmidiSì La Sopa Fresca Crema de Calabaza y Zanahoria (Carrot and Pumpkin Cream) has been repackaged. This 100% vegetable cream can be enjoyed hot or cold, is microwaveable, and is free from glutamate, preservatives, colours, and animal fat. The product is made with fresh vegetables, it is ready in only three minutes, and retails in a 400g recyclable pack.

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

Plodine Pumpkin Seed Oil (Croatia)

Plodine Bucino Ulje (Pumpkin Seed Oil) is now available. The unfiltered oil is halal and HACCP certified, and retails in a 0.25L recyclable bottle.

Claims:
Halal, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Package, GMO-Free

Source: Mintel (2015)

Top Australian Pumpkin Launches:
L3M (May – July 2015)

Latina Fresh Roasted Pumpkin, Parmesan & Chive Stir Through Sauce

Campbell's Country Ladle Rich & Creamy Pumpkin Soup

Thank You. Nut & Chia Bar

YumEarth Organics Citrus Grove Vitamin C Drops

Orgamix Superfoods Fruit 'n' Nut D.I.Y Bliss Balls

The Soup Co. Soup Classics Creamy Pumpkin Ready to Serve Soup

Pitango Pumpkin with Ginger Organic Soup

Coles Thai Pumpkin Soup

Source: Mintel (2015)

Baby Broccoli.

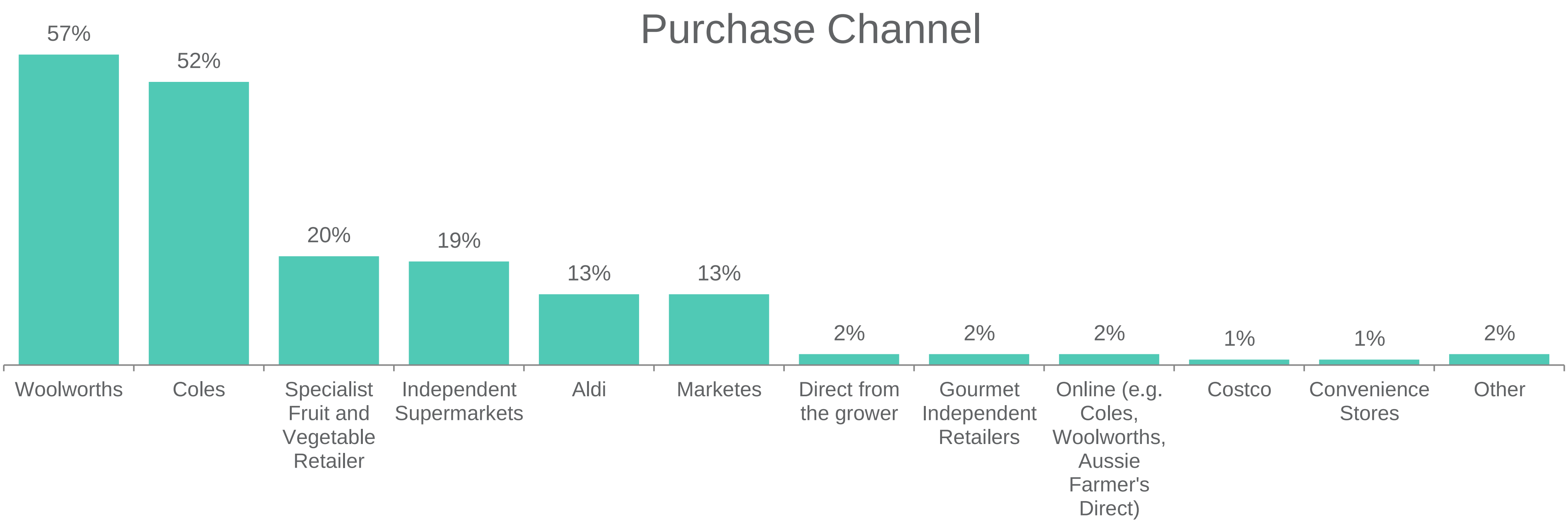
This is the first wave of Baby Broccoli tracking
There were no products launched containing baby broccoli as an ingredient in the past three months.

On average baby broccoli is purchased once a week and consumed on one or two occasions per week.

Baby Broccoli is typically purchased from mainstream retailers, Woolworths and Coles.

Average Purchase **3.8** times per month

Average Consumption **7.2** times per month



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 N=205

Consumers perceive baby broccoli to be moderate value for money.

Average weight of purchase

The average consumer typically purchases **0.6kg** of Baby Broccoli.

Recalled last spend

The average recalled last spend is **$3.60** in May 2015.

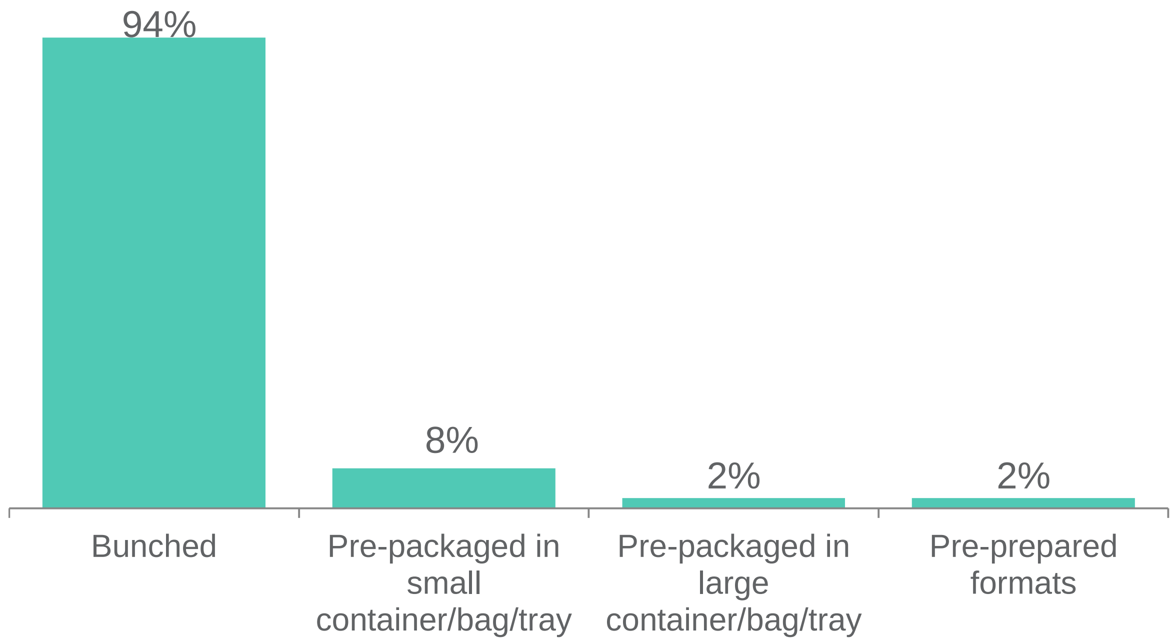
Value for money

On average, consumers perceive Baby Broccoli to be moderate value for money **(6.1/10).**

Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typical purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample N=205

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

Bunched baby broccoli is the dominant format purchased by consumers.

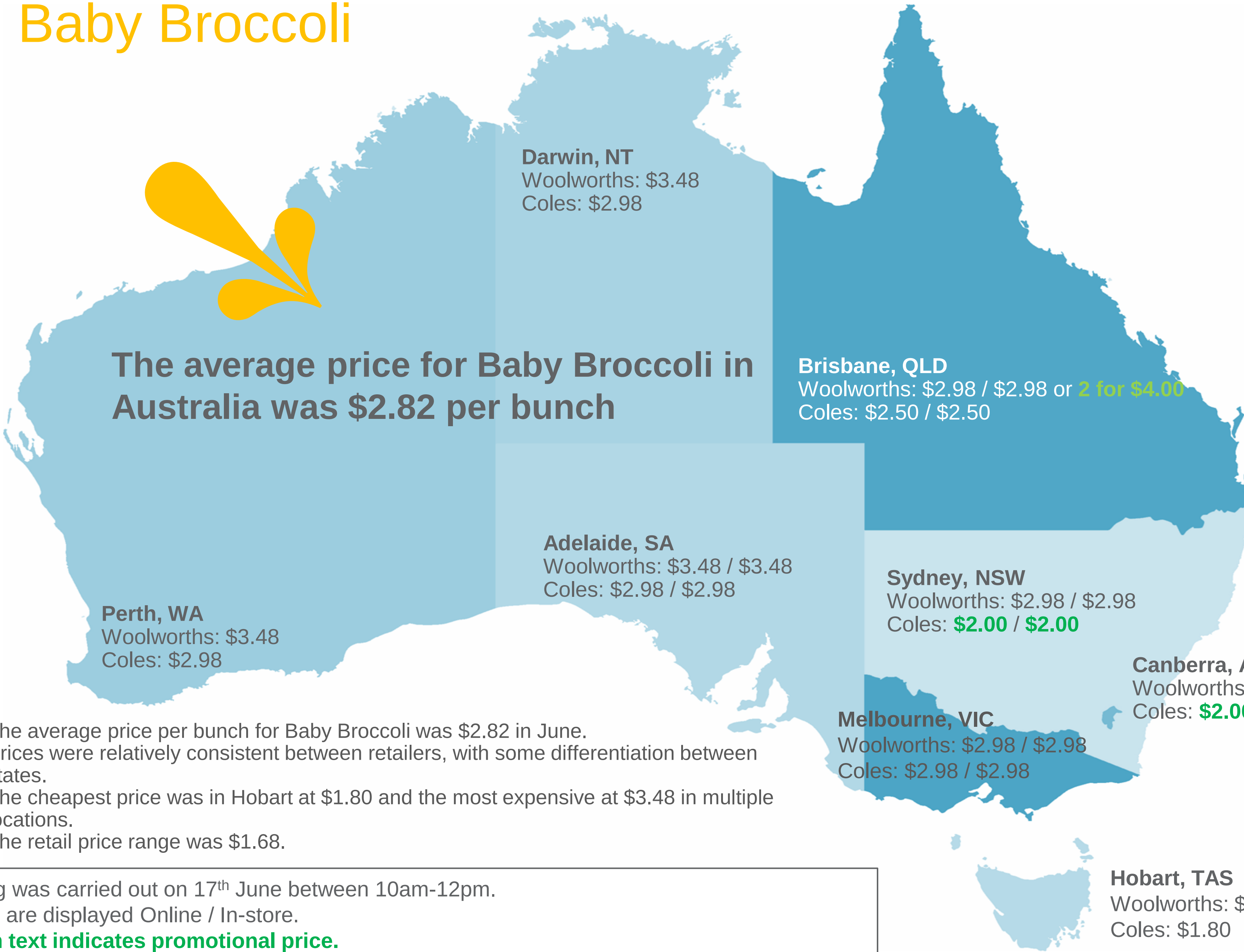


Sample N=205
Q4b. In what fresh formats do you typically purchase <commodity>?

Online and In-store Commodity Prices

Baby Broccoli

The average price for Baby Broccoli in Australia was $2.82 per bunch



- The average price per bunch for Baby Broccoli was $2.82 in June.
- Prices were relatively consistent between retailers, with some differentiation between states.
- The cheapest price was in Hobart at $1.80 and the most expensive at $3.48 in multiple locations.
- The retail price range was $1.68.

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

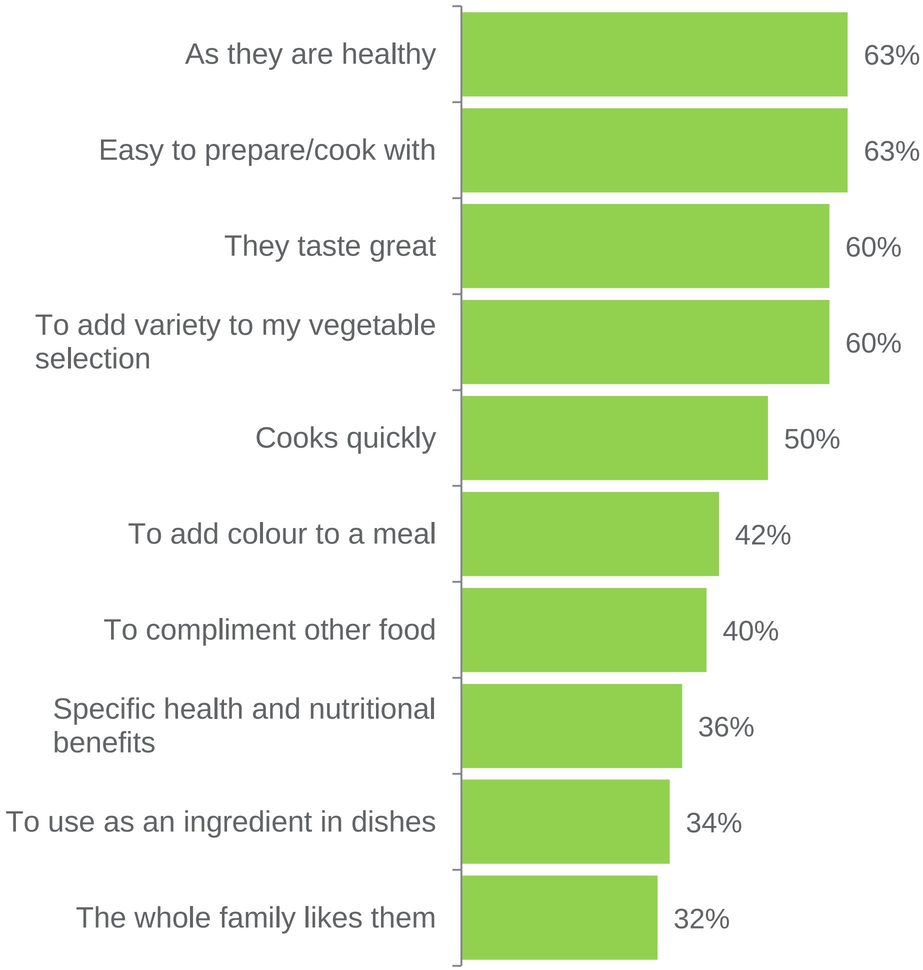
Spontaneous Awareness

Over 85% of consumers were unaware of any varieties of baby broccoli.

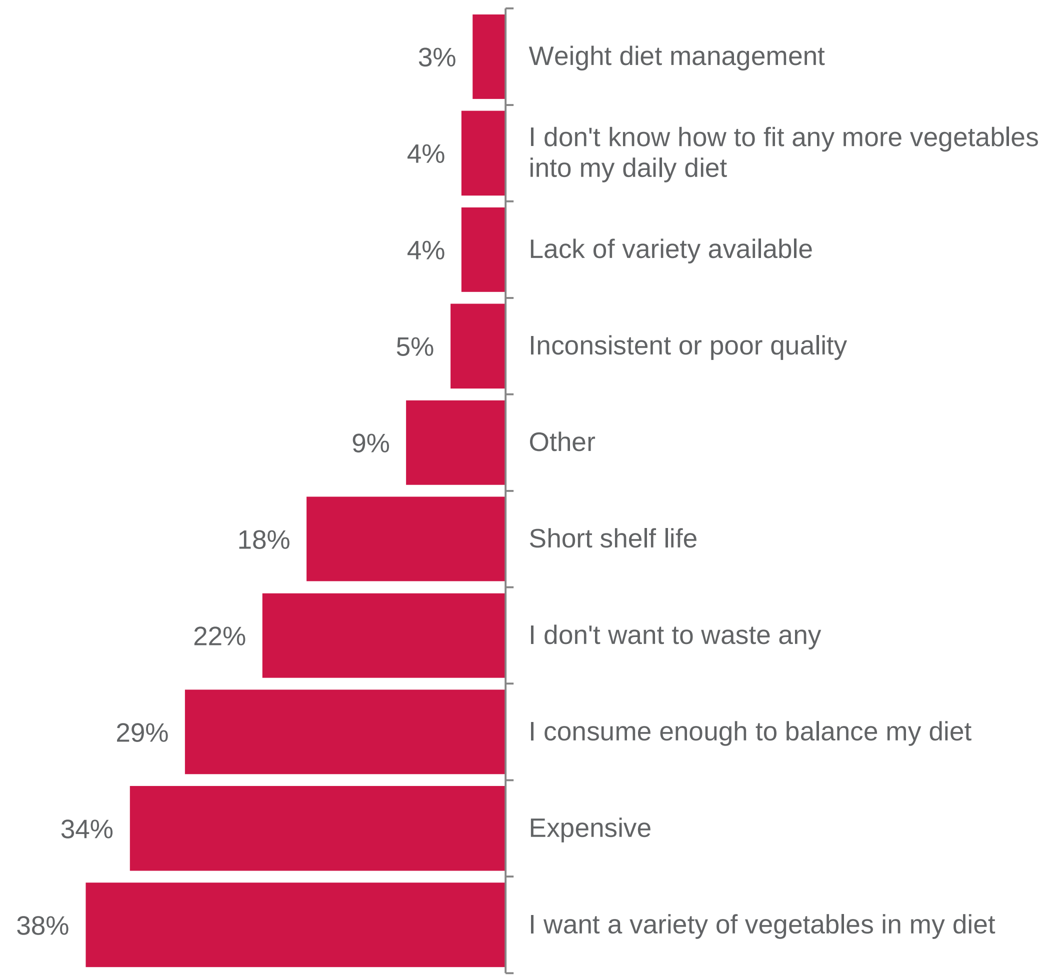
Sample N=205
Q6a. What varieties/types of <commodity> are you aware of? (unprompted)

Health and the ease of preparation are the key drivers for Baby Broccoli purchase. Wanting a variety of vegetables is the key barrier to purchase. Over one third of consumers also indicated price was a major barrier.

Triggers



Barriers



Sample N=205
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

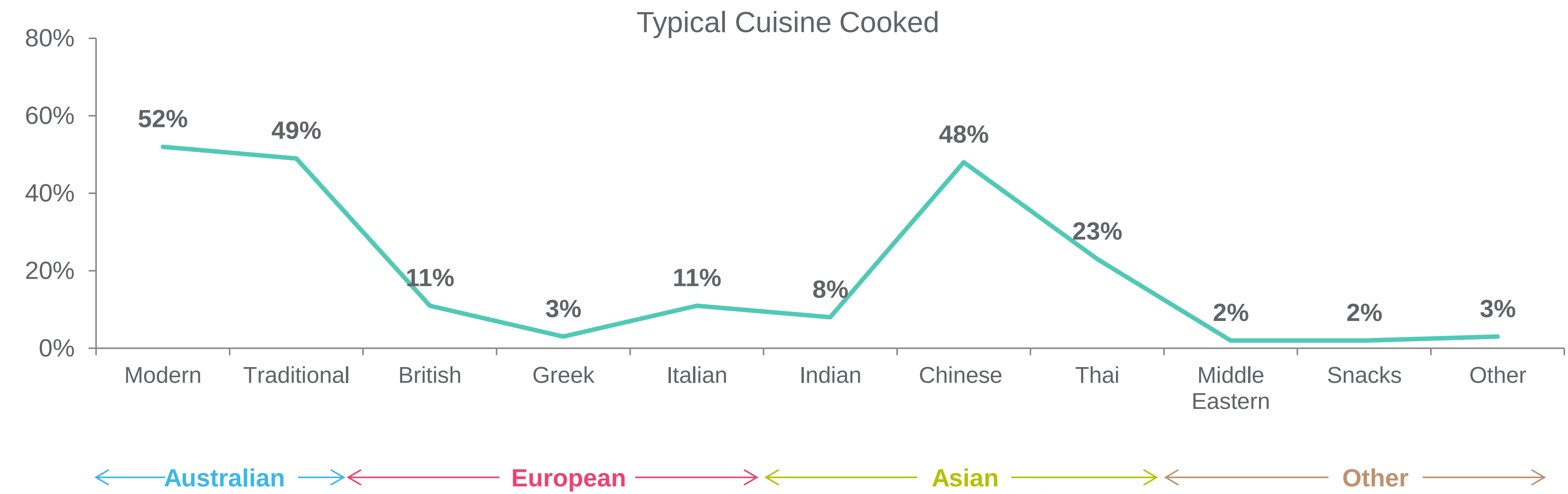
colmar brunton.

Modern Australian and Chinese cuisines are the most popular ways of cooking baby broccoli dishes.

Key meal occasions are around dinner times and family meals.

Top 5 Consumption Occasions

Dinner	**71%**
Family Meals	**62%**
Weekday Meals	**43%**
Quick Meals	**37%**
Weekend Meals	**34%**



Sample N=205
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.

Consumers prefer to serve baby broccoli with carrots and potatoes. Steaming and stir frying are the primary cooking styles.

Accompanying Vegetables

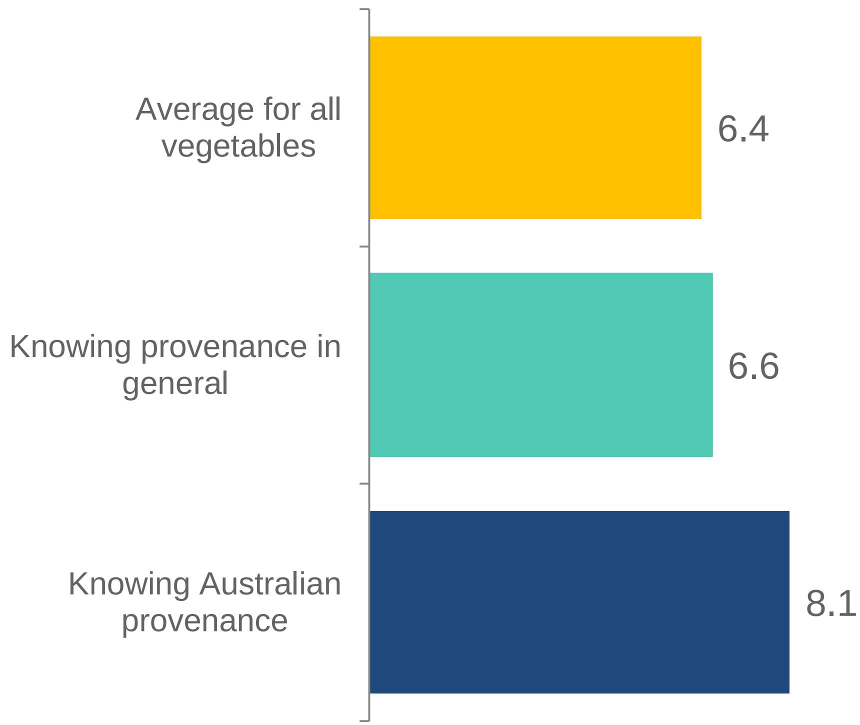
Carrot	70%
Potatoes	54%
Onion	29%
Cauliflower	27%
Sweet Potato	27%

Top Cooking Styles

	Wave 25
Steaming	64%
Stir Frying	47%
Microwave	24%
Boiling	24%
Sautéing	14%
Slow Cooking	8%
Soup	8%
Frying	7%
Raw	3%
Roasting	3%

Sample N=205
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?

General provenance is important to consumers, however, they are more interested in knowing that baby broccoli is grown in Australia.

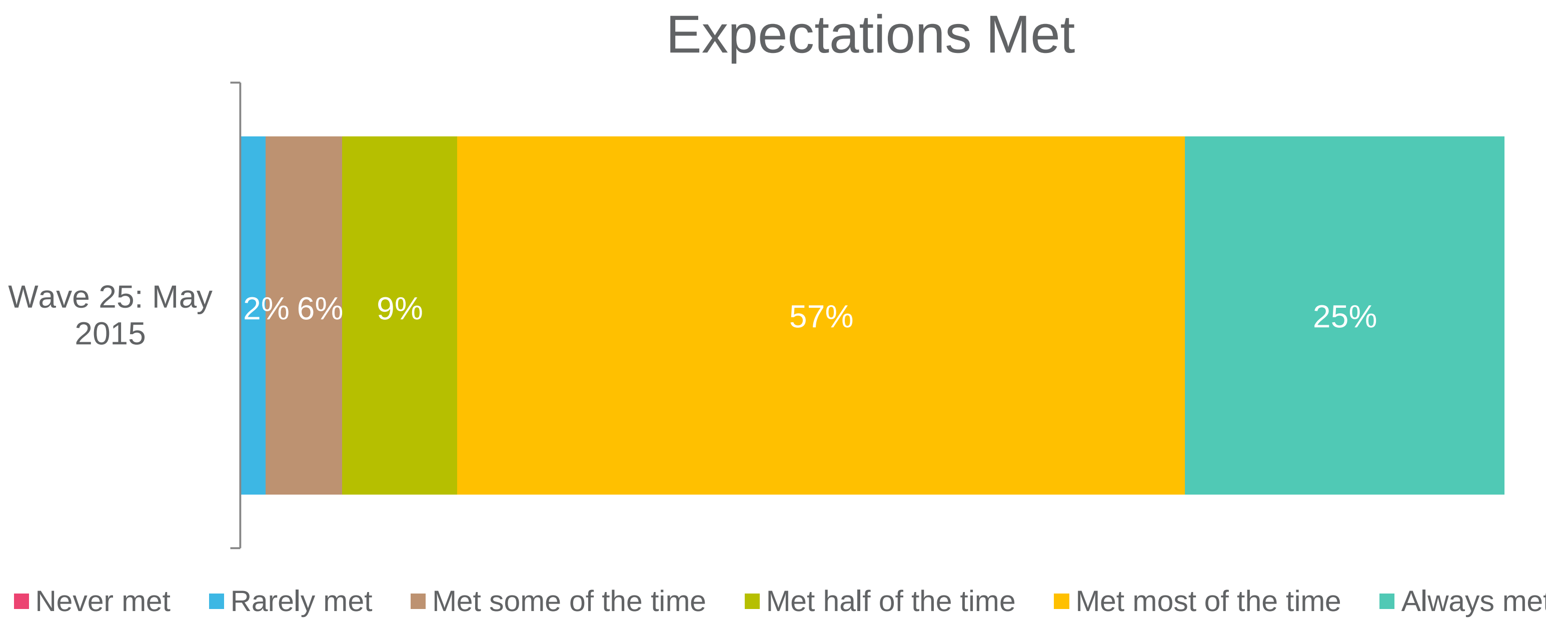


Q14. When purchasing Broccolini/Baby Broccoli, how important is Provenance to you? (that is, knowing where the product is grown/where it comes from
Q15. And when purchasing Broccolini/Baby Broccoli, how important is that it is grown in Australia?
Mean scores out of 10.
Sample N=205

Consumers expect baby broccoli to remain fresh for over six days once purchased.

A quarter of consumers indicate this freshness is always met.

Expected to stay fresh for **6.3** days



Sample N=205
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.

Silverbeet.

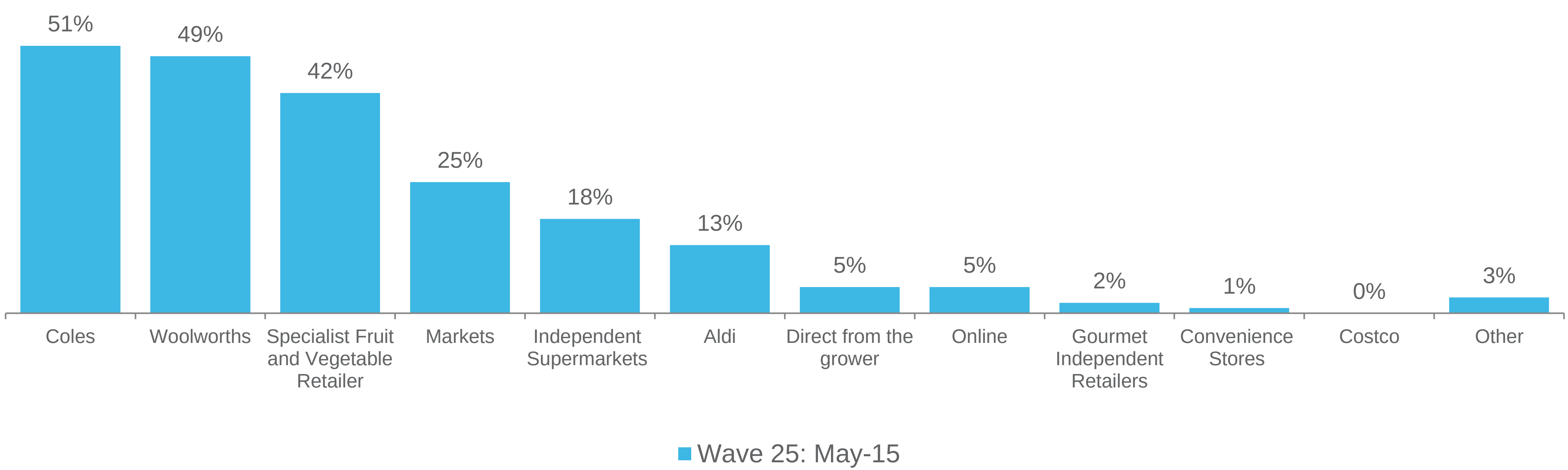
On average, silverbeet is purchased around four times per month, and consumed on eight occasions.

Silverbeet is generally purchased from mainstream retailers, with specialist retailers another popular option.

Average Purchase **3.9** times per month

Average Consumption **8.1** times per month

Purchase Channels



Q1. On average, how often do you purchase silverbeet?
Q2. On average, how often do you consume silverbeet?
Q5. From which of the following channels do you typically purchase silverbeet?
Sample Wave 25 N=203

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

Silverbeet is perceived as good value for money. Consumers are typically purchasing 0.5 – 1.0kg per shop.

Average weight of purchase

The average consumer typically purchases **0.7kg** of silverbeet.

Recalled last spend

Recalled last spend on silverbeet is **$3.30**.

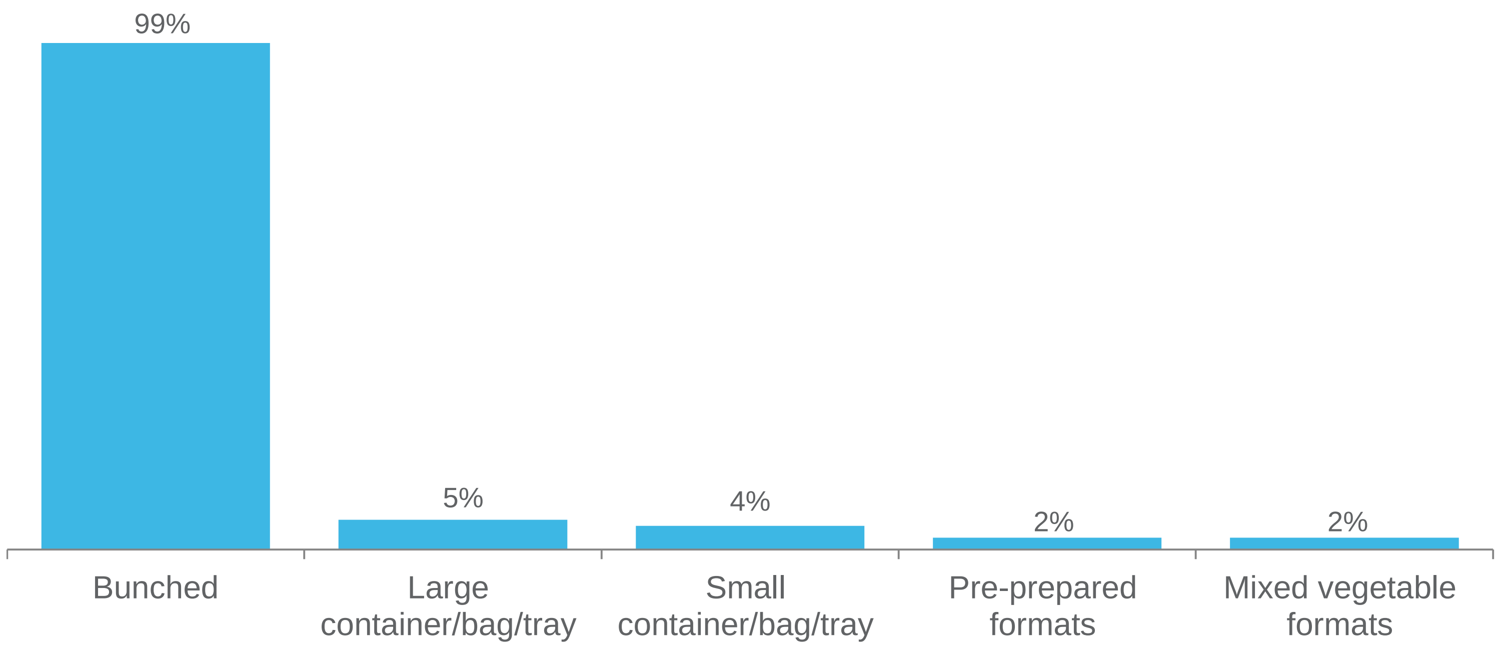
Value for money

Consumers' perceived value for money is relatively good **(6.9/10)**.

Q3. How much silverbeet 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 25 N=203

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

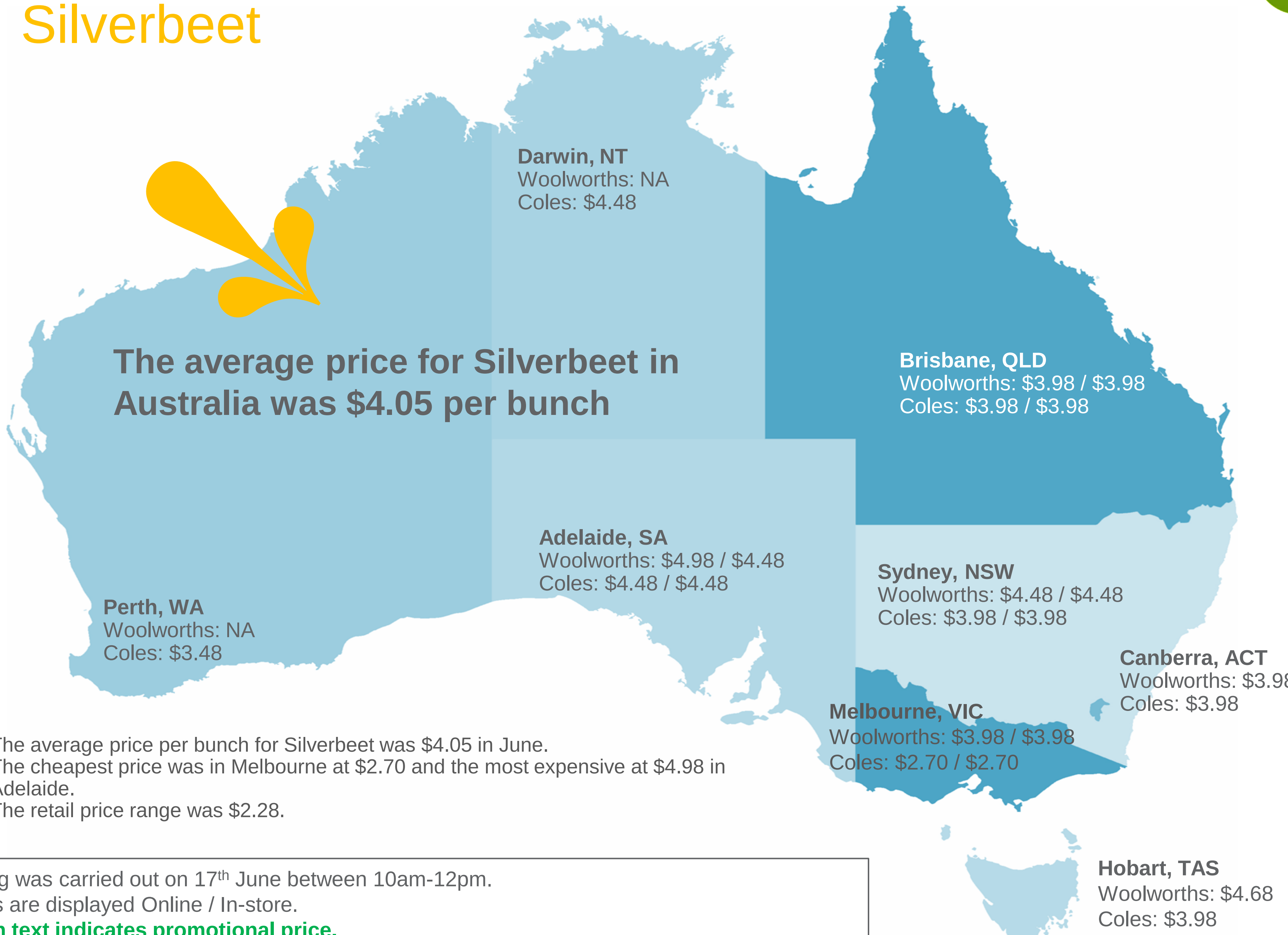
Nearly all consumers purchase silverbeet in bunched formats. This highlights the limited availability in other formats, including pre-packaged.



Q4b. In what fresh formats do you typically purchase Silverbeet?
Sample Wave 25 N=203

Online and In-store Commodity Prices

Silverbeet



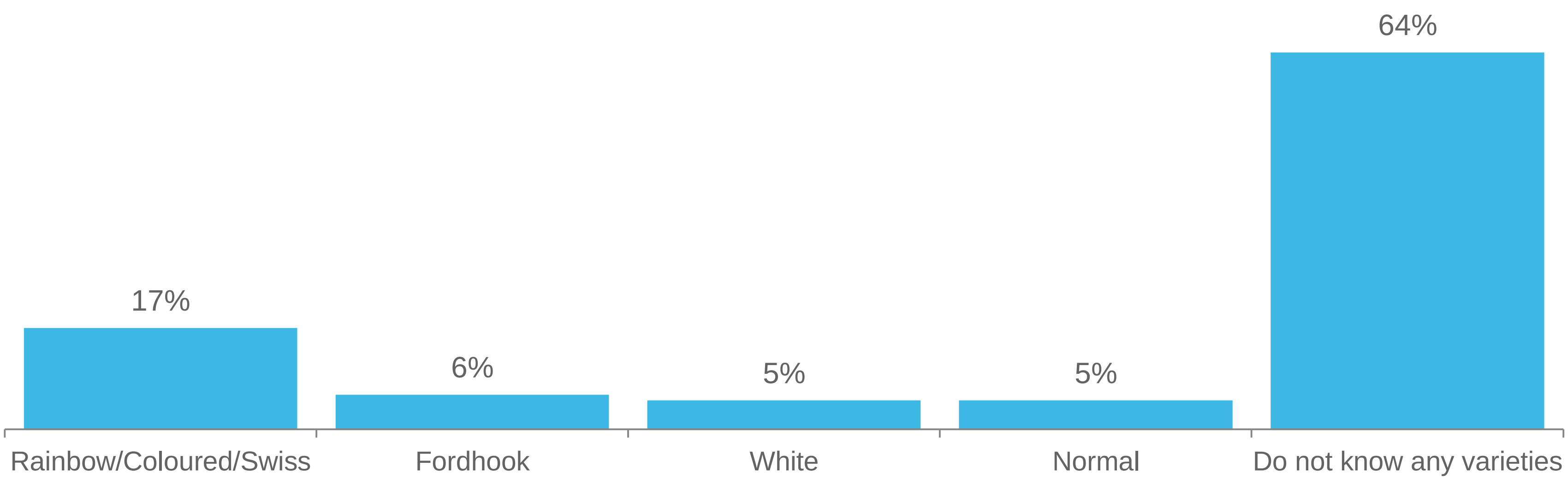
The average price for Silverbeet in Australia was $4.05 per bunch

- The average price per bunch for Silverbeet was $4.05 in June.
- The cheapest price was in Melbourne at $2.70 and the most expensive at $4.98 in Adelaide.
- The retail price range was $2.28.

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

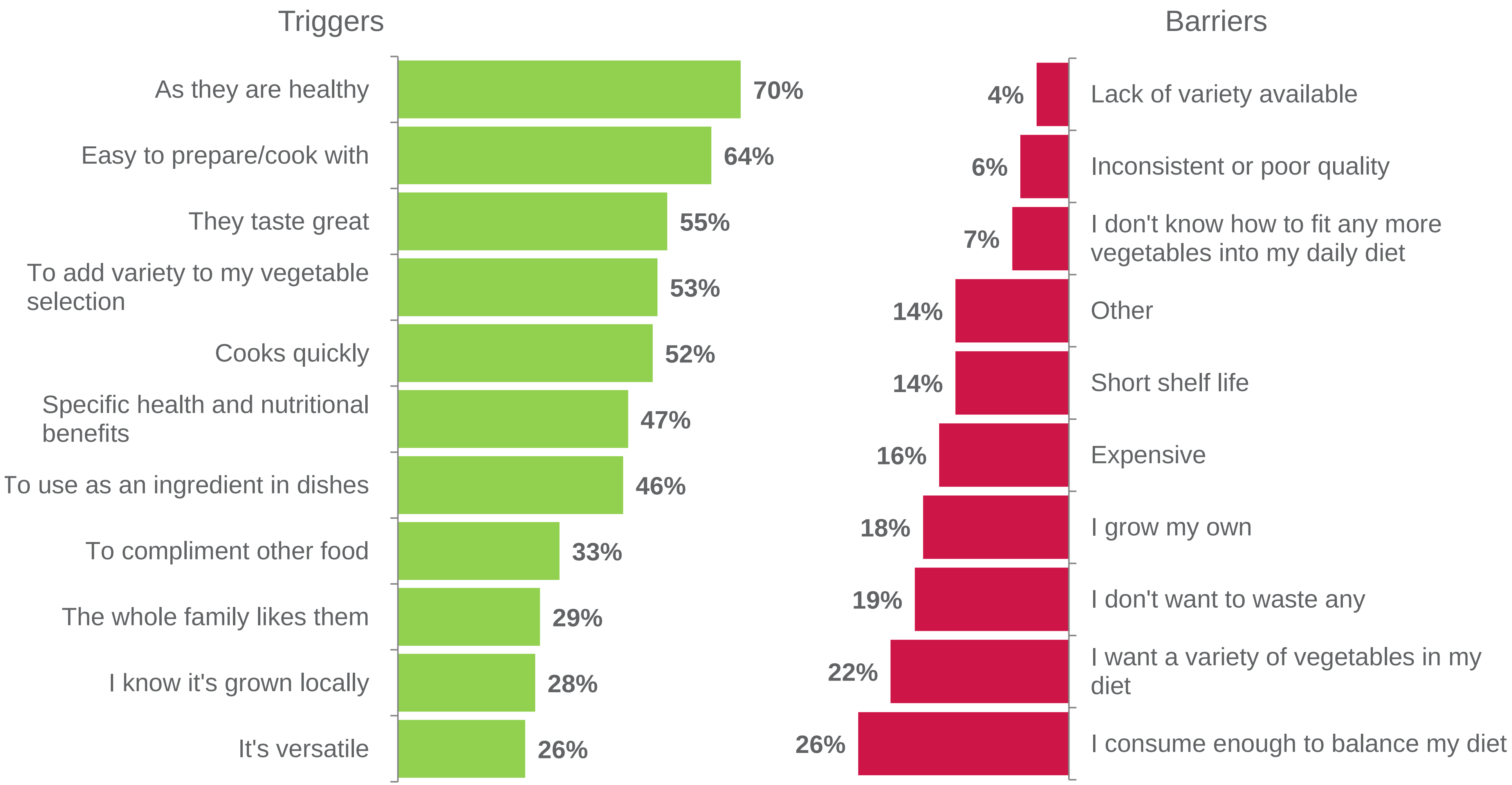
Spontaneous awareness for silverbeet is low, with the highest recall for rainbow/coloured/swiss silverbeet.

Chard (10%) and Spinach (4%) were also recalled by consumers as types of silverbeet.



Q6a. What varieties of Silverbeet are you aware of? (unprompted)
Sample Wave 25 N=203

The key drivers of purchase for silverbeet are because they are healthy and are easy to prepare and cook with. In contrast, already consuming enough for their needs and wanting a variety of vegetables are the main barriers to purchase.



Q7. Which of the following reasons best describes why you purchase Silverbeet ?
Q8. Which reason best describes why you don't buy Silverbeet more often?
Sample Wave 25 N=203

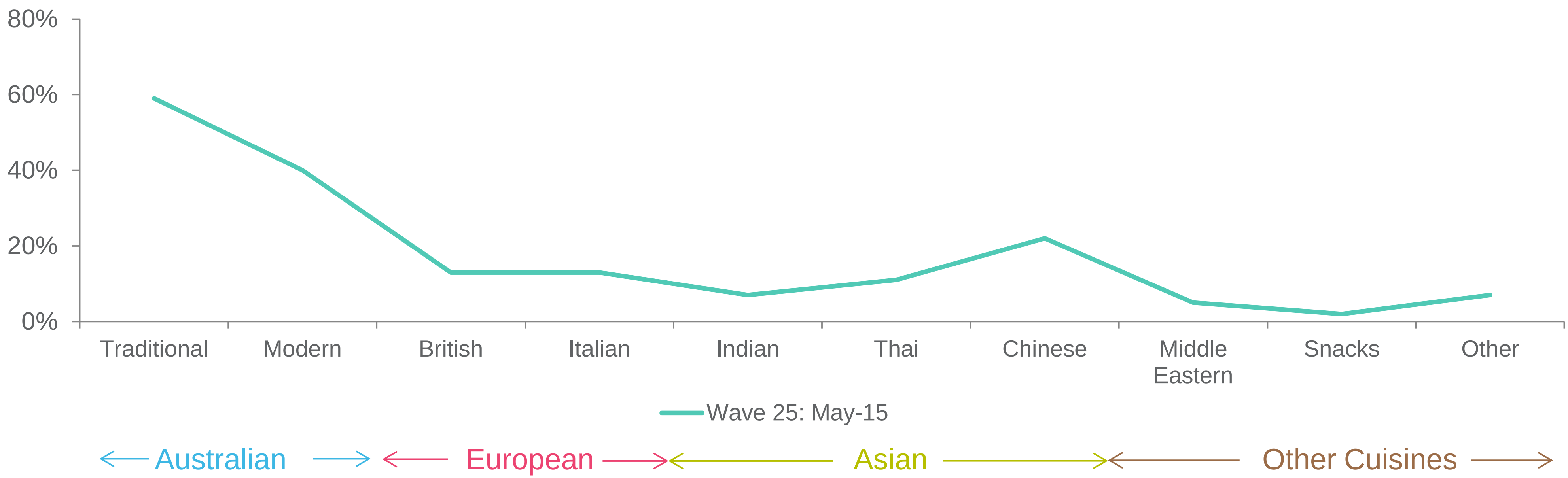
Traditional and Modern Australian cuisine are most popular for silverbeet dishes.

Meal occasions tend to occur during dinner and family meals.

Top 5 Consumption Occasions

Dinner	**67%**
Family meals	**58%**
Weekday meals	**47%**
Weekend meals	**39%**
Quick meals	**34%**

Typical Cuisine Cooked



Q10. What cuisines do you cook/consume that use Silverbeet?
Q11. Which of the following occasions do you typically consume/use Silverbeet?
Sample Wave 25 N=203

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

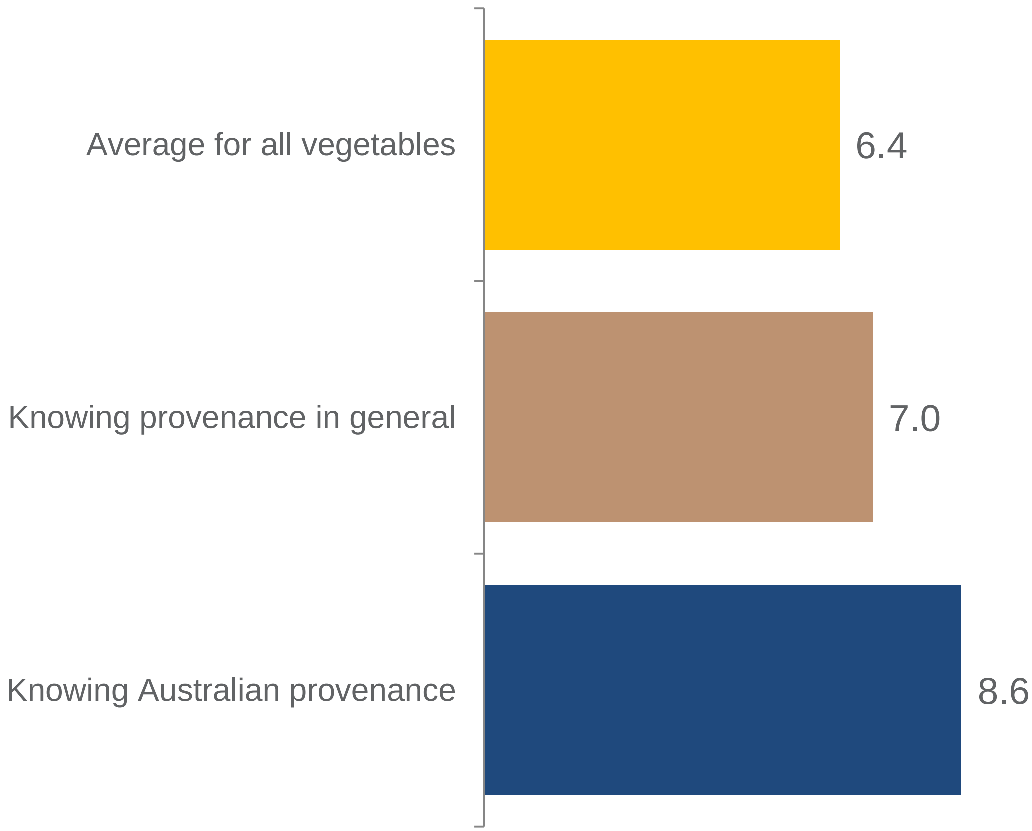
Consumers prefer to use silverbeet mainly with potatoes and carrots, with pumpkin and cauliflower also popular accompanying vegetables. Silverbeet is generally steamed, boiled or cooked in stir- fries.

Accompanying Vegetables	
Potato	61%
Carrot	54%
Pumpkin	34%
Cauliflower	30%
Onion	29%

Top 10 Cooking Styles	Wave 25
Steaming	60%
Boiling	39%
Stir frying	34%
Soup	24%
Sautéing	21%
Microwave	11%
Slow cooking	10%
Frying	9%
Baking	8%
Raw	6%

Q9. How do you typically cook Silverbeet?
Q10a. And when are you serving Silverbeet which of the following do you also serve together with this?
Sample Wave 25 N=203

Knowing that silverbeet is grown in Australia is most important to consumers, followed by general provenance.

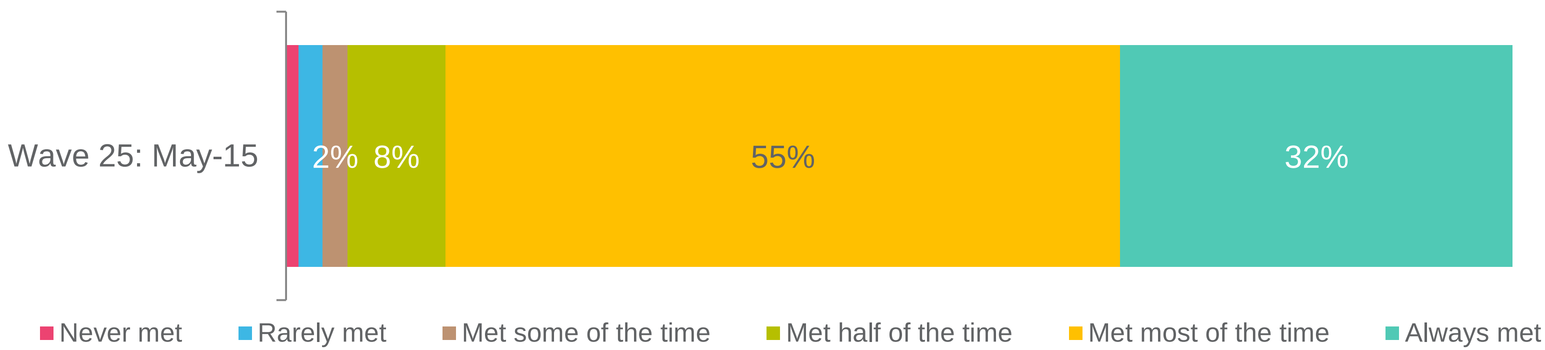


Q14. When purchasing Silverbeet, how important is Provenance to you?
Sample Wave 25 N=203

Consumers expect silverbeet to remain fresh for just under a week once purchased, which is largely being met.

Expected to stay fresh for **6.2** days

Expectations Met



Q12. How long do you expect Silverbeet to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy Silverbeet?
Sample Wave 25 N=203

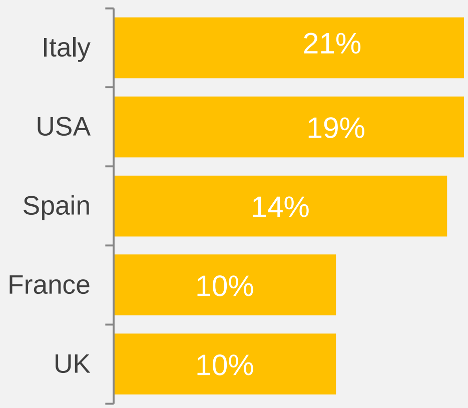
Silverbeet Product Launch Trends.

Silverbeet Global NPDs

May – July 2015

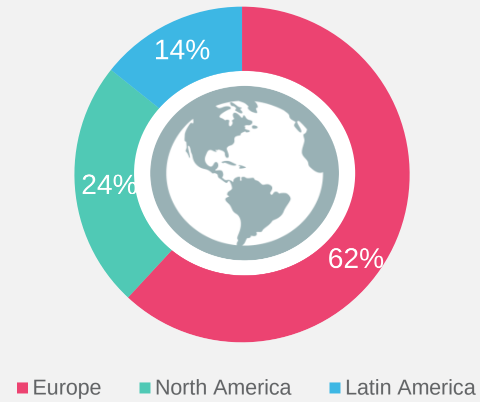
There were 42 products launched in the past three months that contained Silverbeet. Europe, North America and Latin America were the only regions for launches, with Italy and USA being the key countries. Flexible packaging remained the most common format. Launches were predominately in the fruit and vegetables category.

Country

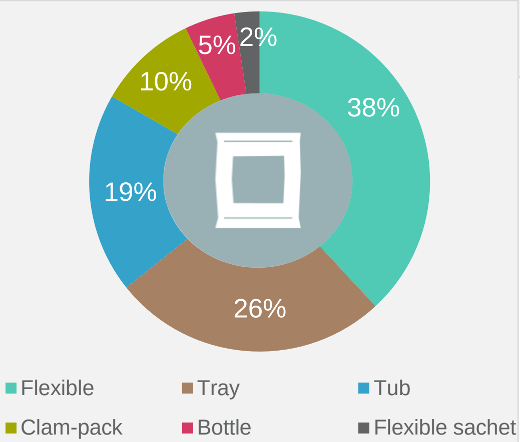


42 Global NPDs

Region



Top Pack Formats



Categories

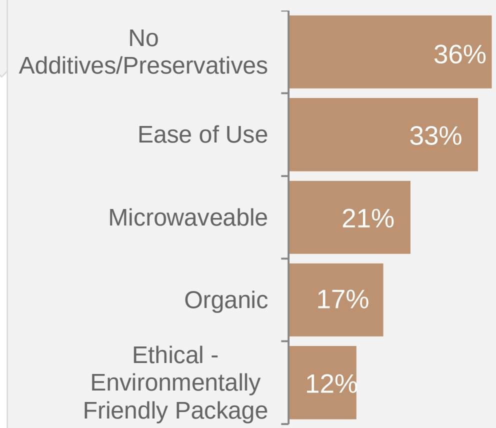
Fruit & Vegetables 48%

Meals & Meal Centres 17%

Soup 17%

Side Dishes 10%

Top Claims



Silverbeet Product Launches:
Last 3 Months (May – July 2015)
Summary

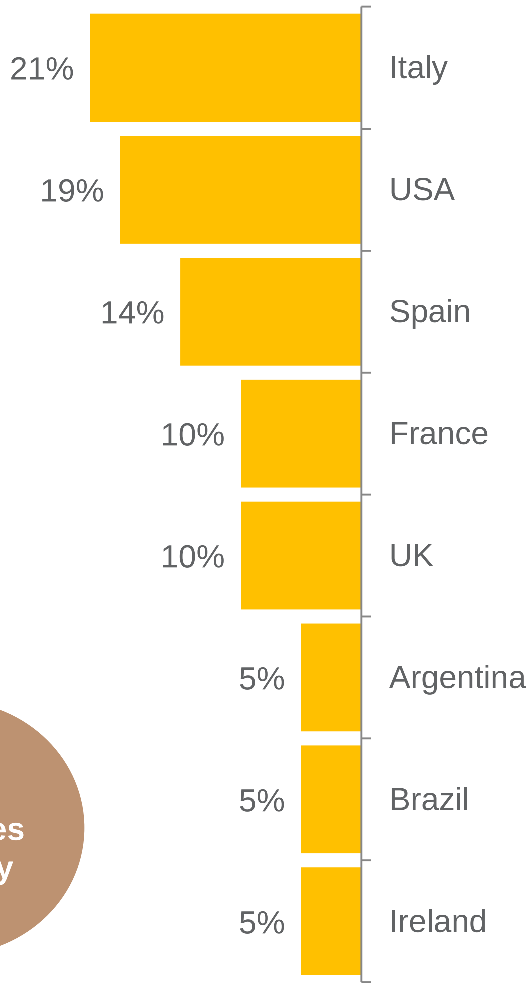
- A total of 42 products containing silverbeet as an ingredient were launched globally in the last 3 months.
- There were no silverbeet launches in Australia this quarter.
- Europe (62%) was clearly the top region for launches. Key countries for innovation were Italy (21%), USA (19%), and Spain (14%).
- Flexible packaging was the most widely used format for launches (38%), followed by tray formats (26%).
- Top categories for product launches were fruit and vegetables (48%), meals and meal centres (17%) and soups (17%).
- Core claims for product launches globally were based around health (e.g. no additives/preservatives 36%, organic 17%) and ease (ease of use 33% and microwaveable 21%).
- The most innovative product was a vegetable ravioli from Peru. Other examples of products can be found at the end of the silverbeet trend report.

Source: Mintel (2015)

Silverbeet Launches
Country & Categories

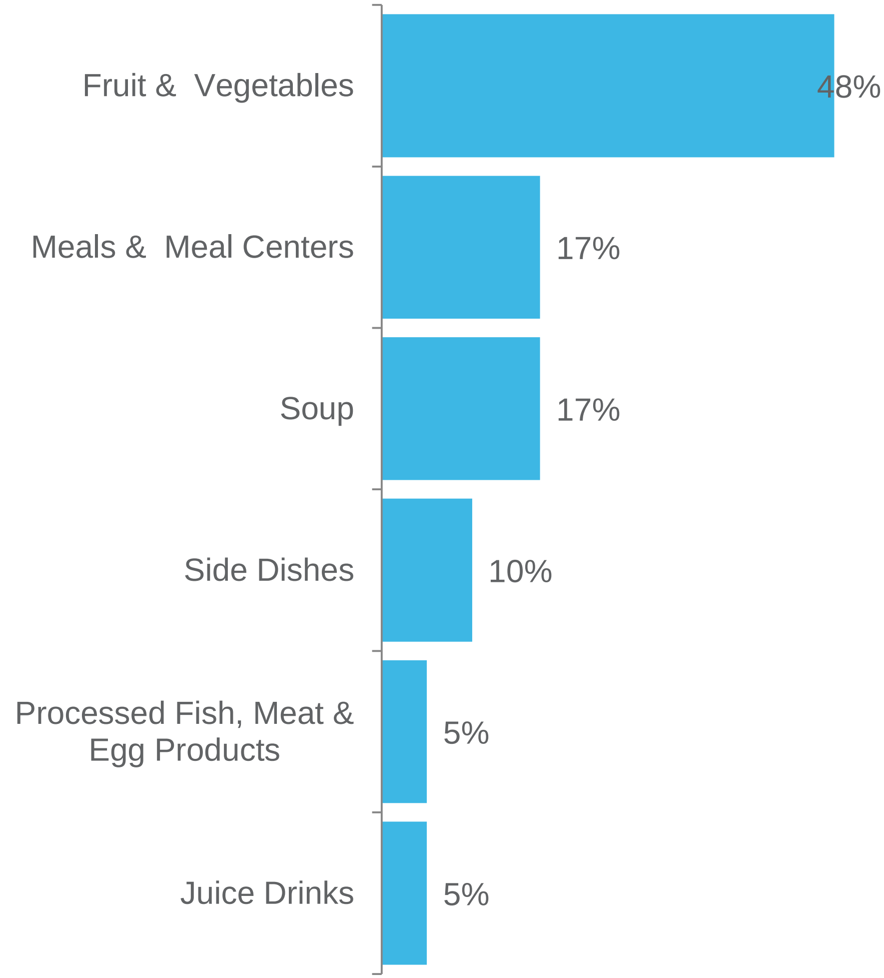
- The most active country for launches in the last 3 months was Italy, followed by USA and Spain.
- Fruit and vegetables are the key category for launches, with meals and soups also common launches.

Top Launch Countries



42 Launches Globally

Top Launch Categories



Number of Global Silverbeet NPD for the L3M N=42

Silverbeet Launches
Top Claims & Pack Formats Used

- The primary format of choice was flexible packaging, consistent with previous waves. Trays and tubs were also popular formats.
- Health and convenience were the key claims used globally, with no additives being most common, while ease of use and microwaveable were also prominent.

Pack Formats Used

	Format	%
Global	Flexible	38%
	Tray	26%
	Tub	19%
	Clam-pack	10%
	Bottle	5%

Top Claims Used

	Claim	%
Global	No Additives/Preservatives	36%
	Ease of Use	33%
	Microwaveable	21%
	Organic	17%
	Ethical – Environmentally Friendly Package	12%

Number of Global Silverbeet NPD for the L3M N=42

Innovative Silverbeet Launches:
L3M (May – July 2015)

Wegmans Organic Food You Feel Good About Super Greens (USA)

Wegmans Organic Food You Feel Good About Super Greens comprise kale, spinach and chard. The heart healthy blend is a great source of vitamins A, C, and K, and is free from artificial colors, flavors or preservatives. The USDA organic certified product is triple washed and retails in a 5-oz. pack.

Claims:
Low/No/Reduced Lactose, No Additives/Preservatives, Low/No/Reduced Allergen, Organic, High/Added Fiber, Vegan, Gluten-Free, No Animal Ingredients

I Tesori Pam & Panorama Summer Vegetable Soup (Italy)

This Italian product is made with fresh vegetables and is free from preservatives. It is as good as homemade and prepared according to the tradition of Italian cuisine. Its typical taste is given by the goodness of the individual ingredients, only fresh peeled and washed vegetables. This microwaveable soup can be served cold and retails in a 620g pack containing two servings.

Claims:
No Additives/Preservatives, Seasonal, Microwaveable

Fresh Express 50/50 Mix Spring Mix & Baby Spinach Salad (Canada)

The ready to eat product has been thoroughly washed and it contains no preservatives. According to the manufacturer, in order to ensure the freshness of their products, the salads have been cooled within hours of their harvest and kept chilled from filed to store. The product retails in a 142g easy open pack.

Claims:
Ease of Use, No Additives/Preservatives, Convenient Packaging

Daily Salad Gourmet Baby Kale Salad (Mexico)

Daily Salad Gourmet Ensalada de Baby Kale (Baby Kale Salad) is new to the range. This salad is ready to eat, comprises a mix of apple, red chard, and sunflower seeds, and also comes with a lemon-dijon vinaigrette. This product retails in a 165g pack, which also contains a fork.

Claims:
Ease of Use

Source: Mintel (2015)

Innovative Silverbeet Launches:
L3M (May – July 2015)

Della Nonna Pastas Vegetable Ravioli (Peru)

Della Nonna Pastas Ravioles Verduras (Vegetable Ravioli) is now available. This 100% natural product is made with selected ingredients following a traditional recipe, is free from preservatives, and is ready in eight minutes. It retails in a 500g easy-to-open pack.

Claims:
No Additives/Preservatives, All Natural Product, Convenient Packaging

Conad Vegetables for Minestrone (Italy)

It is made of 15 selected vegetables, harvested at the right moment of ripeness and frozen on the same day in order to preserve their nutritional values and taste. The product features an intense and authentic flavour, is ready in 20-25 minutes and retails in a newly designed 1kg pack.

Claims:
Ease of Use, Gluten-Free, Low/No/Reduced Allergen, Time/Speed

Aliada Chard (Spain)

Aliada Acelgas (Chard) has been repackaged. This ready-to-cook product is washed and retails in a 300g pack, containing three portions.

Claims:
Ease of Use, Economy

Carrefour Cabbage, Ham & Comté Cheese Salad (France)

Carrefour Salade Trio Chou, Jambon, Comté (Cabbage, Ham & Comté Cheese Salad) is said to be crunchy and creamy. This product retails in a 300g pack.

Claims:
NA

Source: Mintel (2015)

Innovative Silverbeet Launches:
L3M (May – July 2015)

BluePrint Chard Basil Apple Romaine Celery Cucumber Collards Lemon Cold Pressed Juice (USA)

BluePrint Chard Basil Apple Romaine Celery Cucumber Collards Lemon Cold Pressed Juice is described as a leafy green super foods. The kosher and USDA organic certified product comprises 100% raw, organic juice, and contains no GMO or gluten. It retails in a 16-fl. oz. bottle.

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

Marks & Spencer Salads Fruits & Vegetables Feta & Olive Greek Salad with a Zingy Mint & Lemon Dressing (Ireland)

Marks & Spencer Salads Fruits & Vegetables Feta & Olive Greek Salad with a Zingy Mint & Lemon Dressing is now available. The product consists of feta cheese, cherry tomatoes and pitted kalamata olives with a cucumber and lettuce salad and a lemon and mint dressing, is suitable for vegetarians and retails in a 170g pack.

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

Viva Bontá Viva Zucchini Soup (Italy)

Viva Bontá Viva Il Passato di Zucchine (Zucchini Soup) is a fresh, microwaveable product that is free from preservatives and added glutamate. It can be ready in three minutes and retails in a 620g pack that serves two to three portions, bearing the Facebook, Twitter, Pinterest and YouTube logos. The manufacturer claims to use renewable energy sources.

Claims:
No Additives/Preservatives, Social Media, Ethical - Environmentally Friendly Product, Time/Speed, Microwaveable

Leader Price 4 Young Leaves Mix (France)

Leader Price Mélange 4 Jeunes Pousses (4 Young Leaves Mix) has been repackaged in a 125g pack that serves four. This easy and quick-to-prepare product is free from preservatives and contains already washed young leaves of blonde lettuce, red lettuce, red chard or spinach, and green lettuce.

Claims:
Ease of Use, No Additives/Preservatives, Time/Speed

Source: Mintel (2015)

Parsley.

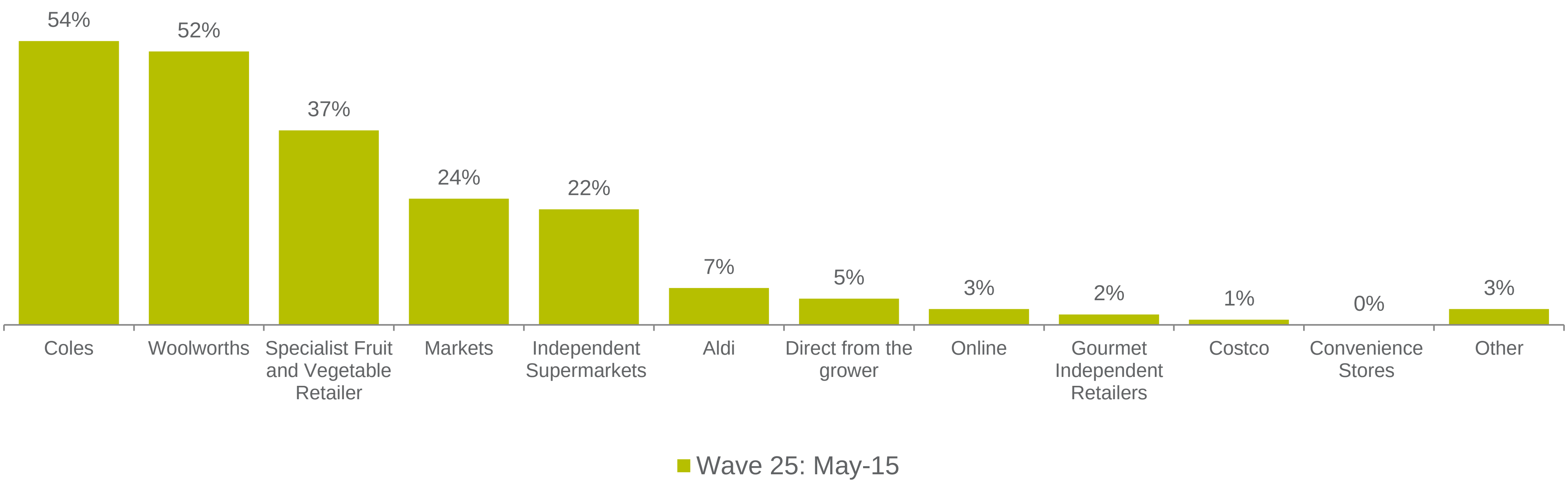
On average, parsley is purchased nearly four times per month, and is consumed around three times per week.

Parsley is generally purchased from mainstream retailers such as Coles and Woolworths.

Average Purchase **3.9** times per month

Average Consumption **11.1** times per month

Purchase Channels



Q1. On average, how often do you purchase parsley?
Q2. On average, how often do you consume parsley?
Q5. From which of the following channels do you typically purchase parsley?
Sample Wave 25 N=201

Horticulture Innovation Australia

colmar brunton.

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

Parsley is perceived as fair value for money, with a relatively large outlay in spend for a small quantity of the herb, comparative to other vegetables.

Average weight of purchase

The average consumer typically purchases **0.2kg** of parsley.

Recalled last spend

Recalled last spend on parsley is **$3.10**.

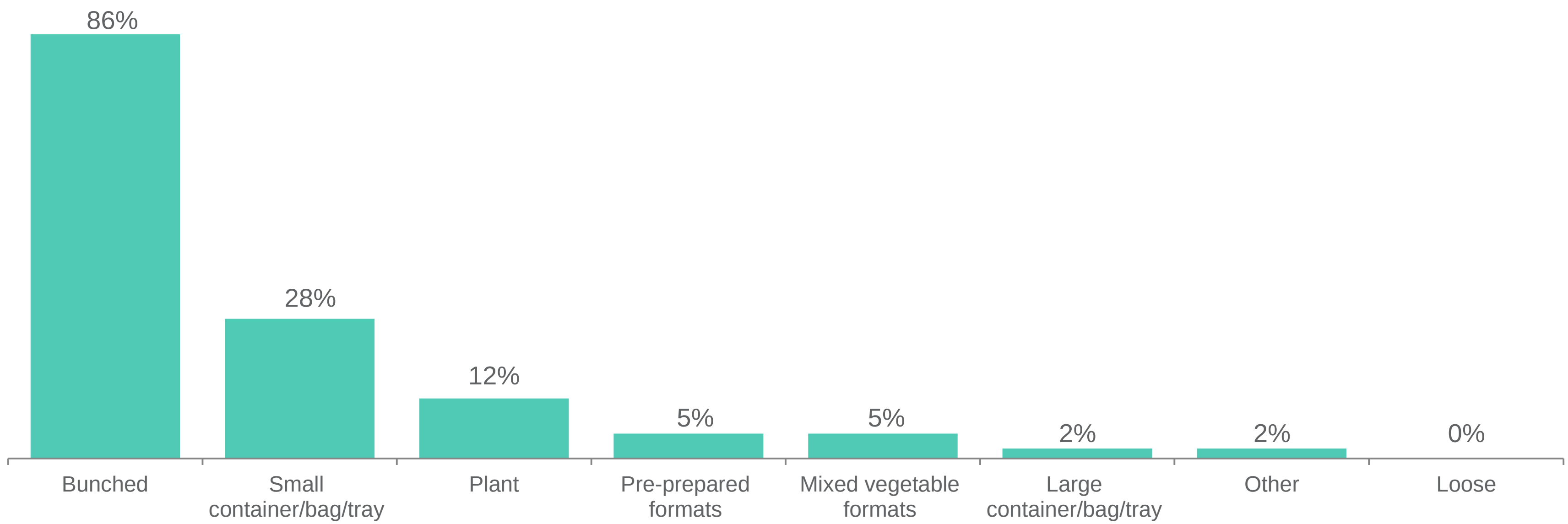
Value for money

Consumers' perceived value for money is fair for parsley **(5.7/10)**.

Q3. How much parsley 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 25 N=201

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

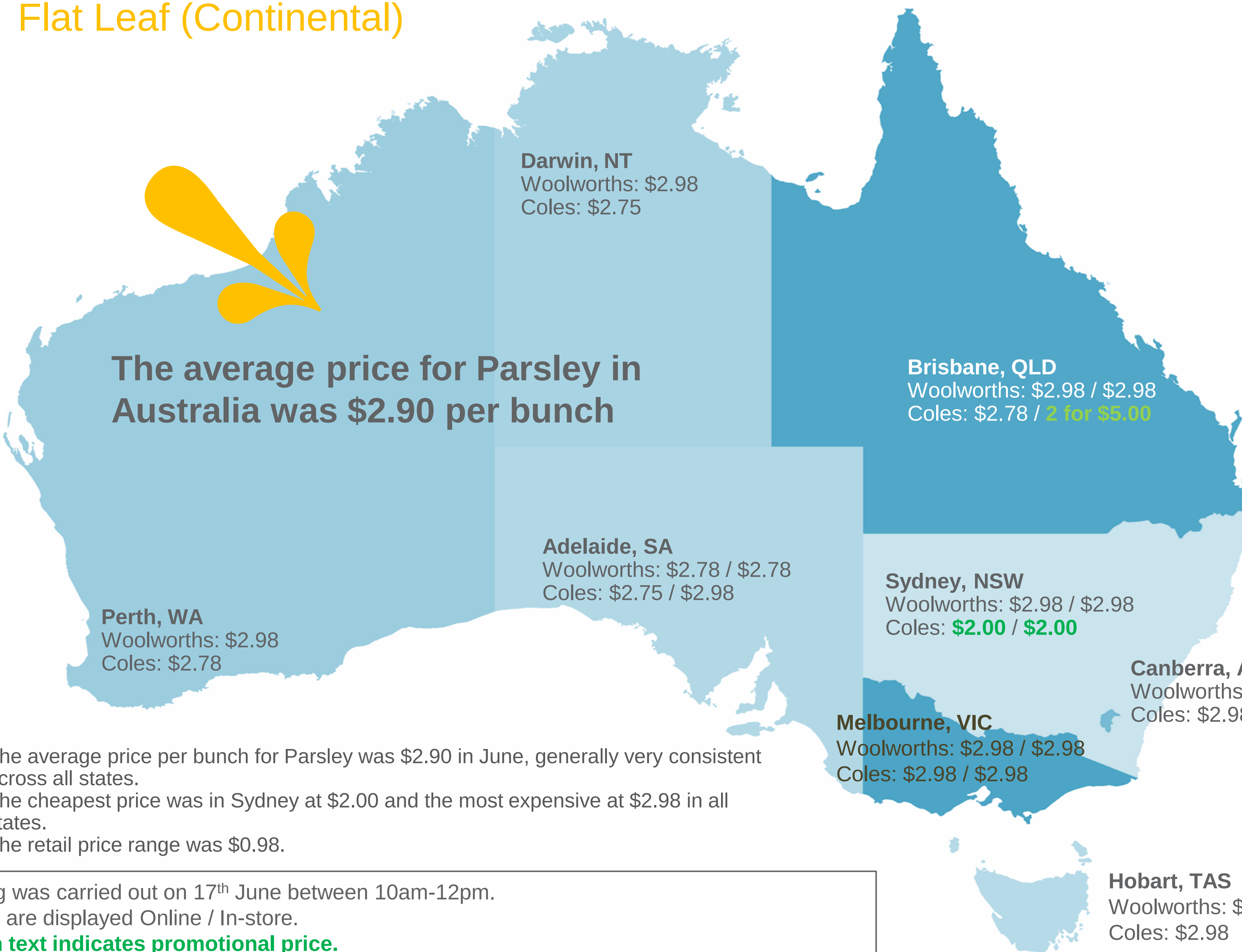
Bunched parsley is the most common purchase format. Small containers and plants are other popular format options typically purchased by consumers.



Q4b. In what fresh formats do you typically purchase Parsley?
Sample Wave 25 N=201

Online and In-store Commodity Prices

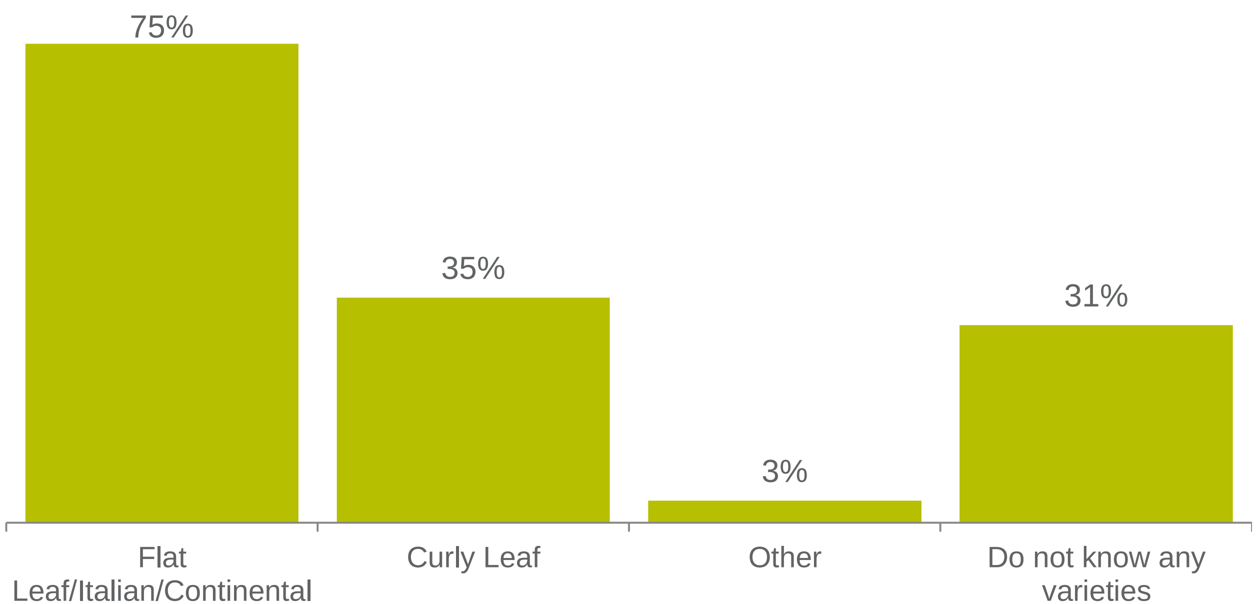
Flat Leaf (Continental)



- The average price per bunch for Parsley was $2.90 in June, generally very consistent across all states.
- The cheapest price was in Sydney at $2.00 and the most expensive at $2.98 in all states.
- The retail price range was $0.98.

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

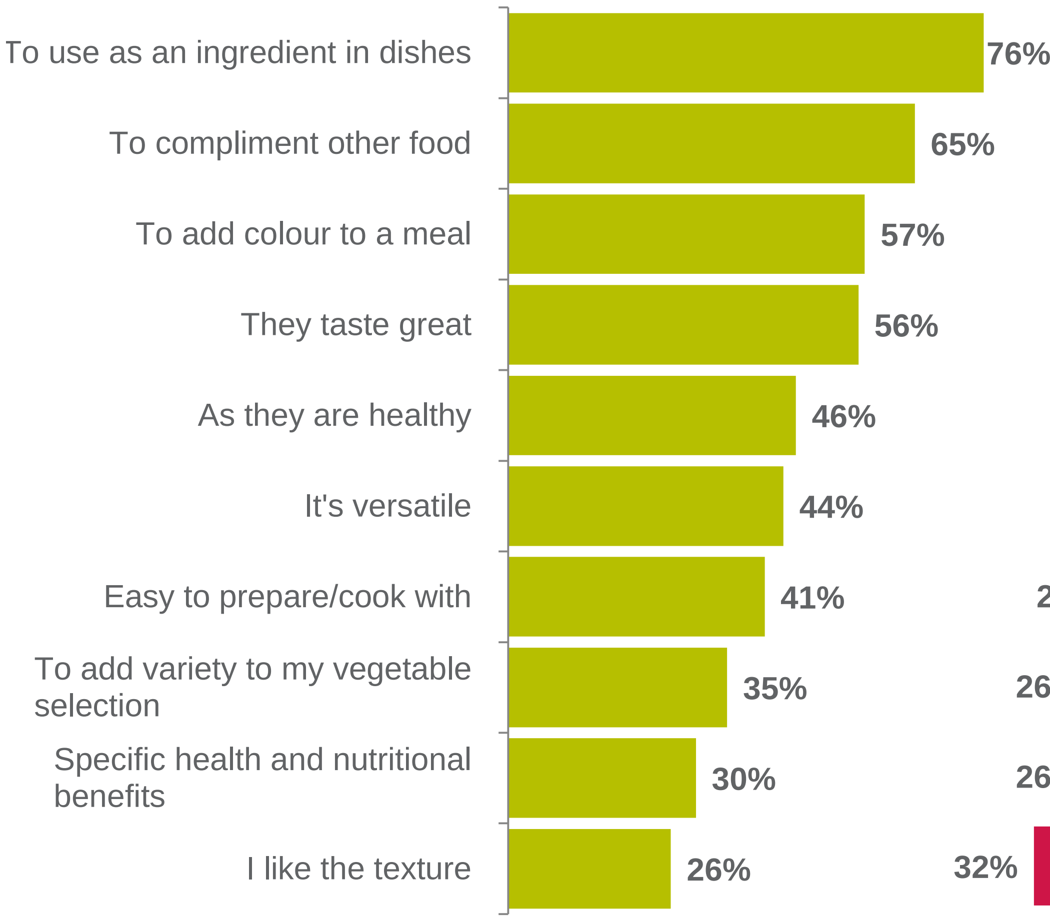
Spontaneous awareness is relatively high, with most consumers able to recall Flat Leaf/Italian/Continental Parsley and Curly Leaf Parsley.



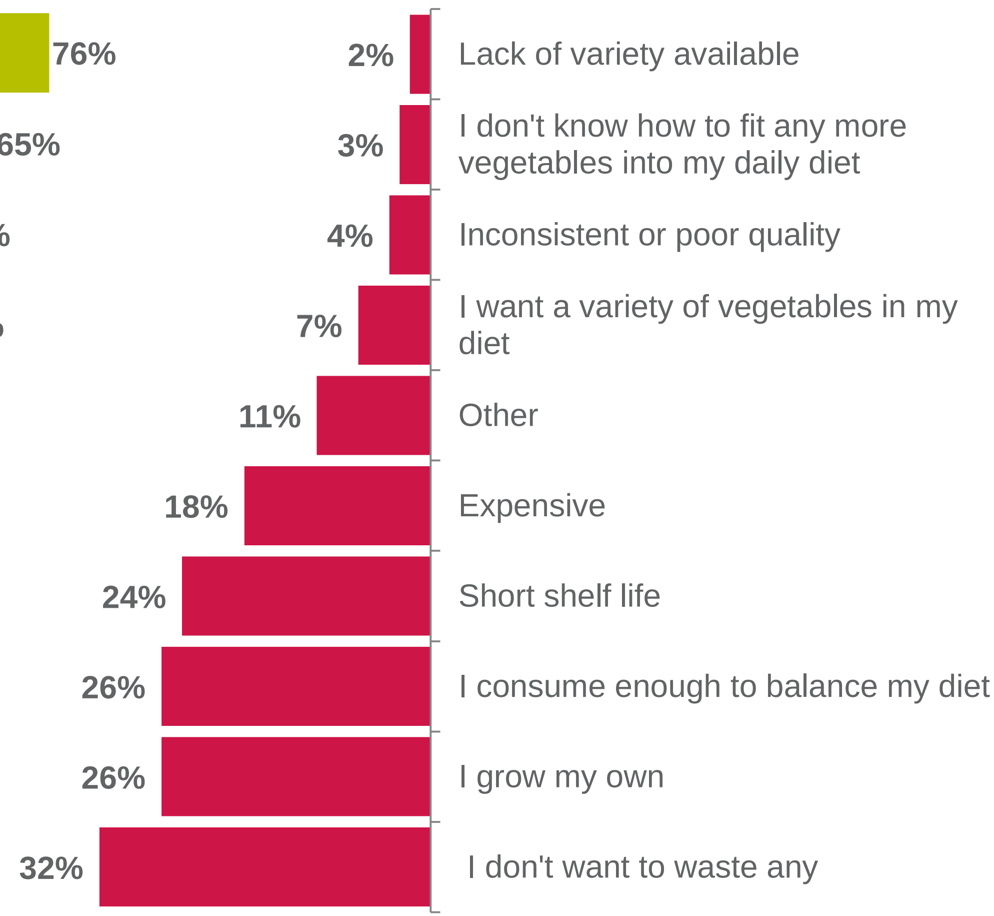
Q6a. What varieties of parsley are you aware of? (unprompted)
Sample Wave 25 N=201

Using parsley as an ingredient in dishes, complementing other foods and adding colour to meals are the key drivers of purchase. In contrast, the key barriers to purchase are not wanting to waste any and growing their own parsley, which is done by a quarter of consumers.

Triggers



Barriers



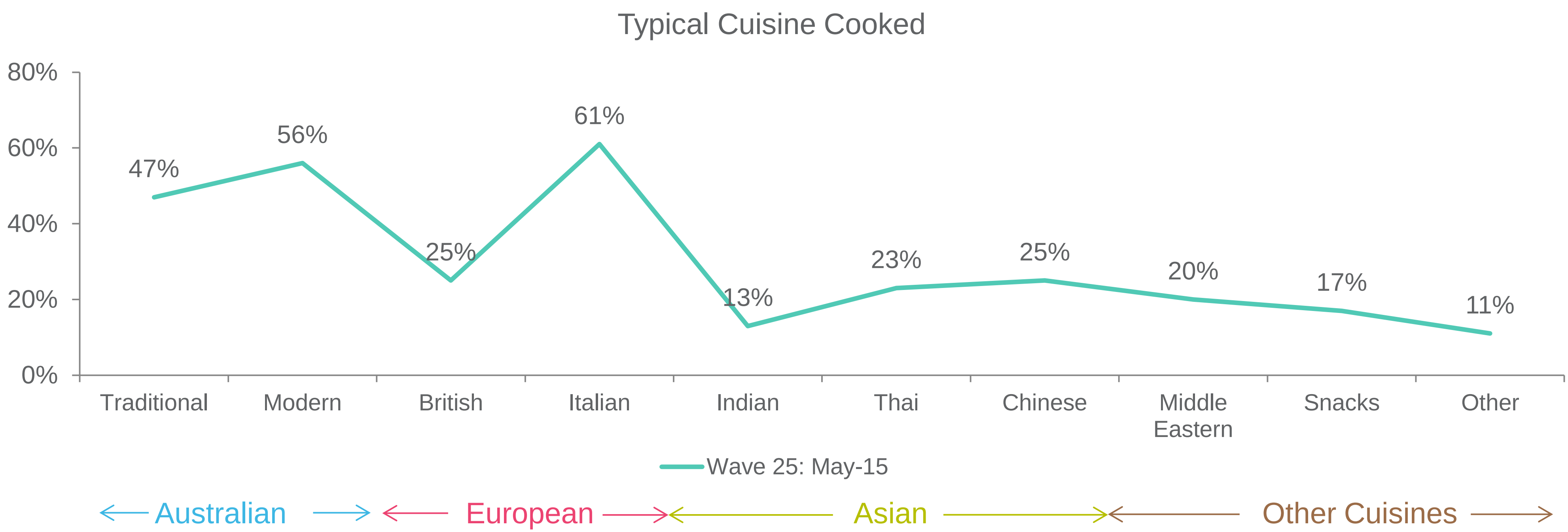
Q7. Which of the following reasons best describes why you purchase parsley?
Q8. Which reason best describes why you don't buy parsley more often?
Sample Wave 25 N=201

Italian and Modern Australian cuisine are popular for parsley dishes.

Meal occasions tend to occur during dinner and family meals.

Top 5 Consumption Occasions

Dinner	**73%**
Family meals	**69%**
Weekday meals	**54%**
Quick meals	**51%**
Weekend meals	**51%**



Q10. What cuisines do you cook/consume that use parsley?
Q11. Which of the following occasions do you typically consume/use parsley?
Sample Wave 25 N=201

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

Consumers prefer to use parsley mainly with potatoes and tomatoes, onions and carrots are also popular choices. Parsley is generally consumed raw but also popular cooked in soups and stir fries.

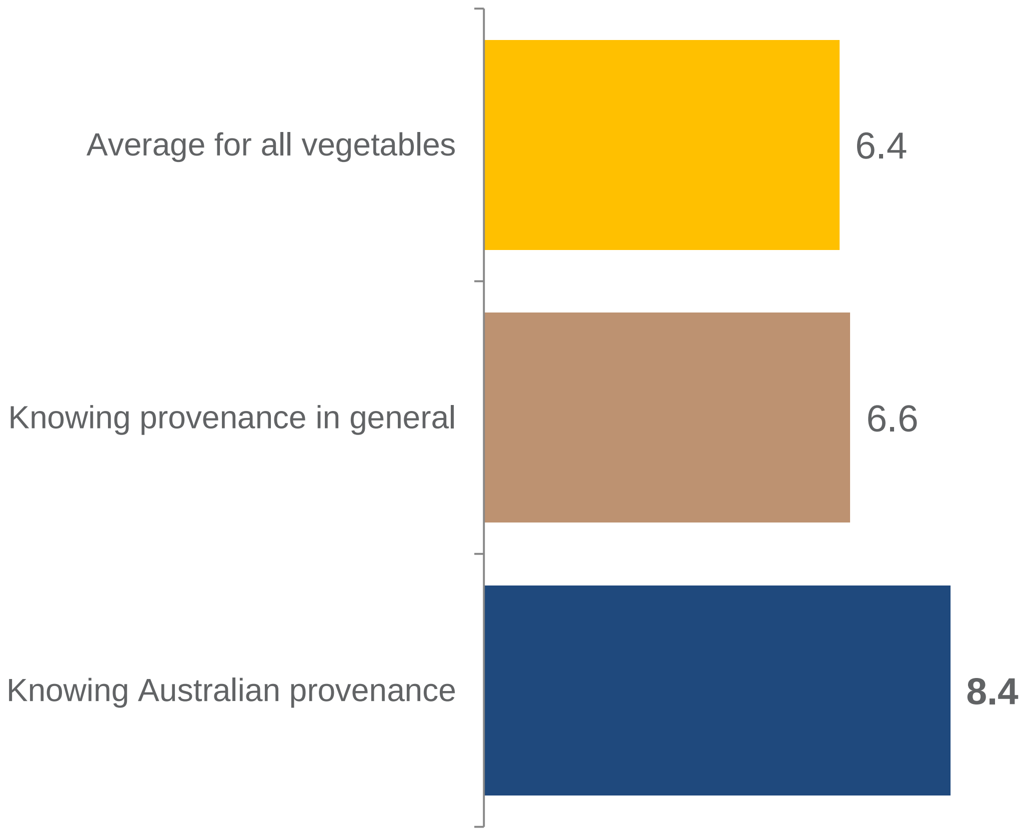
Accompanying Vegetables

Potato	60%
Tomato	59%
Onion	47%
Carrot	44%
Garlic	33%

Top 10 Cooking Styles	Wave 25
Raw	63%
Soup	52%
Stir frying	40%
Slow cooking	26%
Baking	20%
Sautéing	20%
Frying	17%
Mashing	15%
Steaming	14%
Roasting	13%

Q9. How do you typically cook parsley?
Q10a. And when are you serving parsley which of the following do you also serve together with this?
Sample Wave 25 N=201

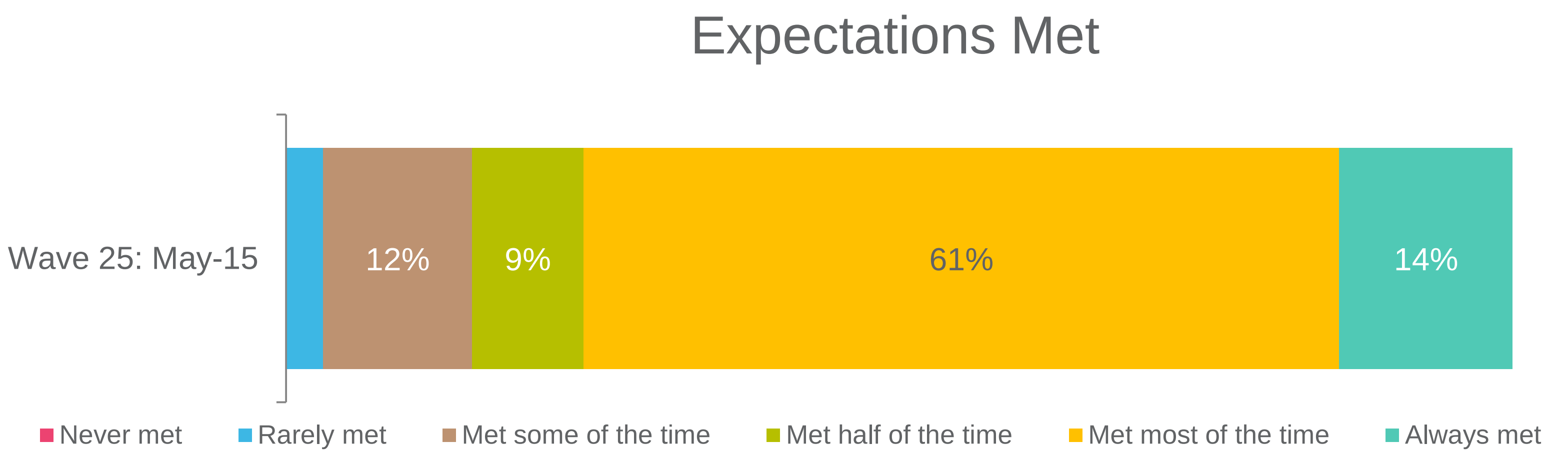
Knowing that Parsley is grown in Australia is the most important provenance information for consumers.



Q14. When purchasing parsley, how important is Provenance to you?
Sample Wave 25 N=201

Consumers expect parsley to remain fresh for just over a week once purchased, which is being met most of the time.

Expected to stay fresh for **7.7** days



Q12. How long do you expect parsley to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy parsley?
Sample Wave 25 N=201

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

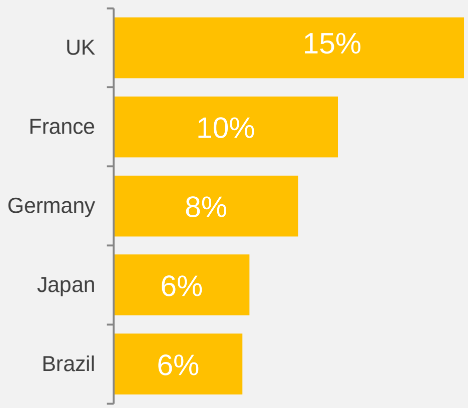
Parsley Product Launch Trends.

Parsley Global NPDs

May – July 2015

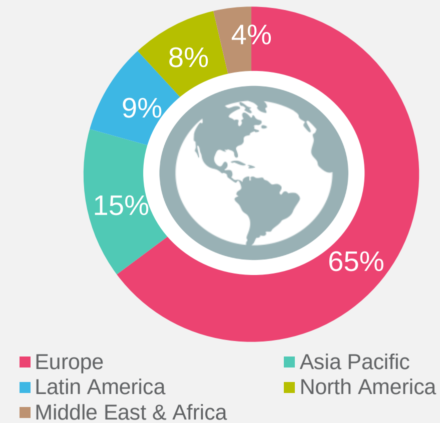
There were 2009 products launched in the past three months that contained Parsley. Europe and Latin America were the key regions for launches, with UK and France being the main countries. Flexible packaging remained the most common format. Launches were predominately in the sauces and seasonings or meals categories.

Country

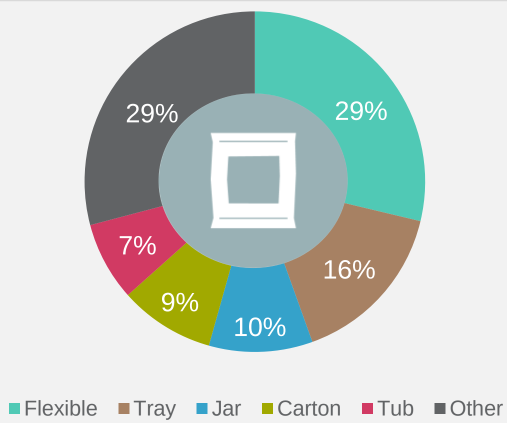


2009 Global NPDs

Region



Top Pack Formats



Categories

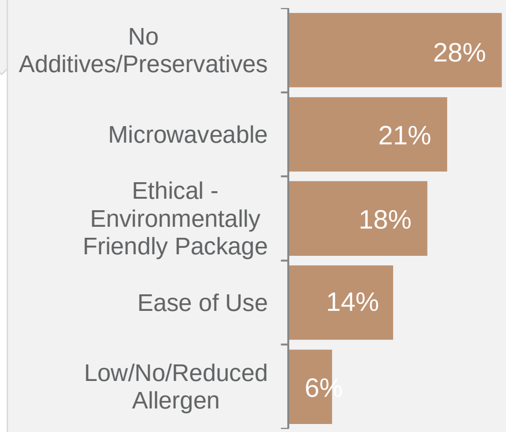
Sauces & Seasonings 26%

Meals & Meal Centres 22%

Processed Products 13%

Snacks 13%

Top Claims



Parsley Product Launches:
Last 3 Months (May – July 2015)
Summary

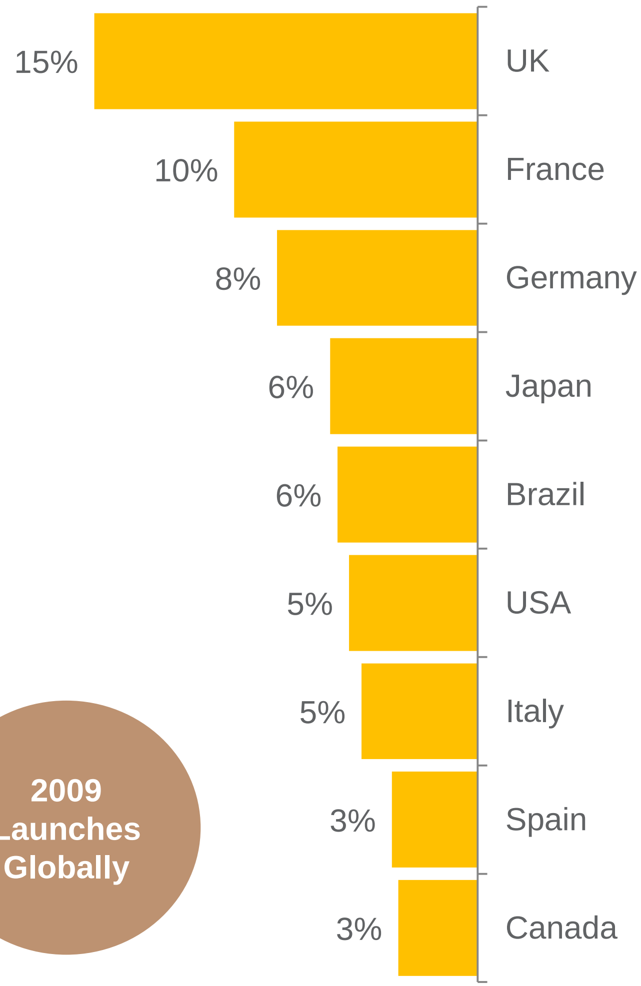
- A total of 2009 products containing parsley as an ingredient were launched globally in the last 3 months.
- There were 55 parsley launches in Australia this quarter.
- Europe (65%) was clearly the top region for launches. Key countries for innovation were UK (15%), France (10%) and Germany (8%).
- Flexible packaging was the widely used format for launches (29%), followed by tray formats (16%).
- Top categories for product launches were sauces and seasonings (26%), meals and meal centres (22%), processed products (13%) and snacks (13%).
- Core claims for product launches globally included no additives/preservatives (28%), microwaveable (21%), ethical – environmentally friendly package (18%), and ease of use (14%) .
- The most innovative product included a chicken paella soup from New Zealand and pulled pork wraps from Australia. Other examples of products can be found at the end of the parsley trend report.

Source: Mintel (2015)

Parsley Launches
Country & Categories

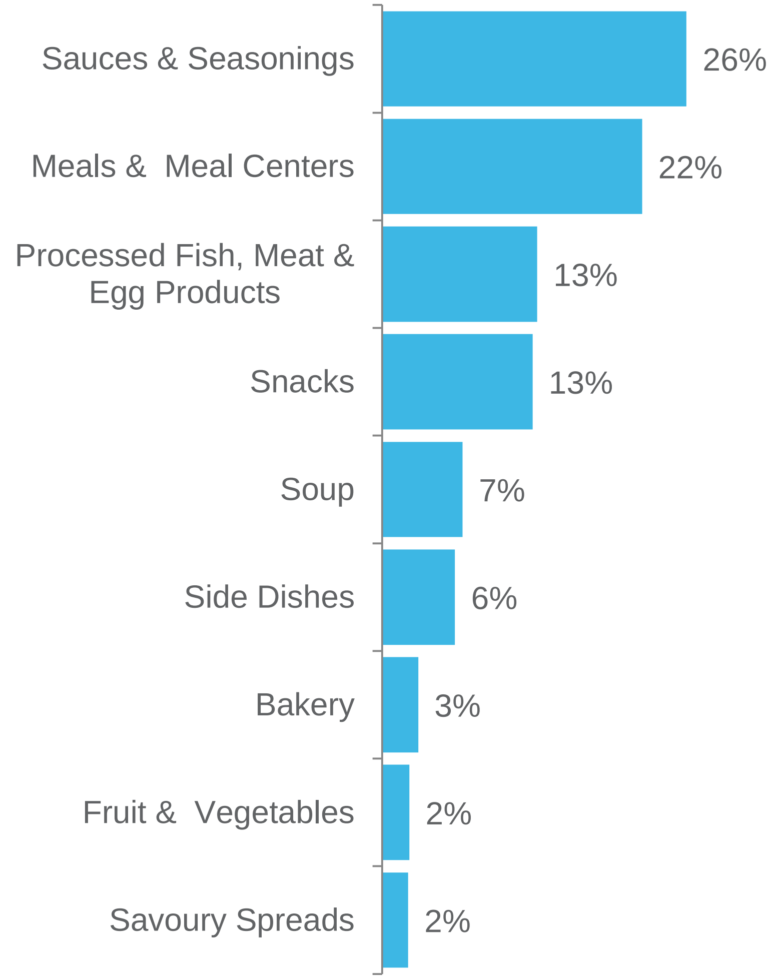
- The most active country for launches in the last 3 months was the UK, followed by France and Germany.
- Sauces and seasonings are the key category for launches, with meals and processed products also common launches.

Top Launch Countries



2009 Launches Globally

Top Launch Categories



Number of Global Parsley NPD for the L3M N=2009

Parsley Launches

Top Claims & Pack Formats Used

- Pack formats were consistent across regions, with the primary format of choice being flexible packaging.
- No additives and preservatives were the key claim used globally, while microwaveable and environmentally friendly packaging was also popular in Europe and Asia Pacific.

Pack Formats Used

Global	Flexible	29%
Global	Tray	16%
Global	Jar	10%
Europe	Flexible	26%
Europe	Tray	21%
Europe	Tub	11%
Asia Pacific	Flexible	38%
Asia Pacific	Flexible stand-up pouch	11%
Asia Pacific	Flexible sachet	10%

Top Claims Used

Global	No Additives/Preservatives	28%
Global	Microwaveable	21%
Global	Ethical - Environmentally Friendly Package	18%
Europe	No Additives/Preservatives	27%
Europe	Ethical - Environmentally Friendly Package	24%
Europe	Microwaveable	19%
Asia Pacific	No Additives/Preservatives	35%
Asia Pacific	Microwaveable	22%
Asia Pacific	Ethical - Environmentally Friendly Package	15%

Number of Global Parsley NPD for the L3M N=2009

Innovative Parsley Launches:
L3M (May – July 2015)

Marc Angelo Mozzarella & Red Pepper Chicken Sausage (Canada)

Marc Angelo Mozzarella & Red Pepper Chicken Sausage are now available in a newly designed pack. The gourmet smoked sausages are fully cooked and contain no gluten, added nitrites or MSG. The microwaveable product can be used to top pizzas, stir-fry with vegetables or serve as a side for breakfast. It retails in a 375g pack.

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

FamilyMart Macaroni and Cheese (Philippines)

FamilyMart Macaroni and Cheese is now available. The product can be heated in the microwave and retails in a single unit pack.

Claims:
Microwaveable

Pitango Spanish Chicken Paella Soup (New Zealand)

Pitango Spanish Chicken Paella Soup is a hearty soup made with chicken, vegetables and rice with aromatic smoked paprika. The manufacturer claims to use only natural ingredients, make meat stocks from scratch, fresh, every day. They also carefully select the finest quality ingredients and use simple techniques to bring out the best flavour. This gluten free soup with no added preservatives is microwaveable and retails in a 600g pack containing two servings.

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

Antica Tenuta Baked Black Olives (Italy)

Antica Tenuta Olive al Forno (Baked Black Olives) are now available. The artisanal specialty from Sicily retails in a 200g pack.

Claims:
NA

Source: Mintel (2015)

Innovative Parsley Launches:
L3M (May – July 2015)

President's Choice Creamy Garlic Greek Yogurt Spreadable Dip (Canada)

President's Choice Creamy Garlic Greek Yogurt Spreadable Dip is a creamy yogurt dip and spread. It is said to be a perfect dipping sauce for pizza or veggies, and contains no colours or artificial flavours. This kosher dairy product is made with 100% Canadian milk, and retails in a 350g pack.
.

Claims:
No Additives/Preservatives, Kosher

Herta Tendre Noix Red Label Superior Ham (France)

Herta Tendre Noix Supérieur Label Rouge (Red Label Superior Ham) is made from fresh and specially selected whole pork legs. The product retails in a 120g recyclable pack containing four slices.

Claims:
Ethical - Environmentally Friendly Package

Parati Flay Gourmet Onion & Parsley Flavored Snacks with Cereals (Brazil)

Parati Flay Gourmet Pique Snacks de Cereais Sabor Cebola e Salsa (Onion & Parsley Flavored Snacks with Cereals) have been relaunched, being previously available under the Parati Dá+Um! Pique brand. This artificially flavored product is retailed in a 40g pack. The manufacturer supports the Instituto Bom de Bola, a foundation that promotes amateur sports amongst children, adults and elderly.

Claims:
Ethical - Charity

Maggi Ideea Zilei Base for Potatoes with Garlic (Romania)

Maggi Ideea Zilei Baza pentru Cartofi cu Usturoi (Base for Potatoes with Garlic) now features a new recipe. The product is formulated with spices, dehydrated vegetables, salt and a drop of oil, and retails in a 29g pack that contains an oven bag and features a recipe idea.

Claims:
NA

Source: Mintel (2015)

Innovative Parsley Launches:
L3M (May – July 2015)

Herbalife Fiber & Herb Vegetable Fiber Tablets (Brazil)

Herbalife Fiber & Herb Fibras Vegetais em Tabletes (Vegetable Fibers Tablets) are now available. This product retails in a 180-ct. pack.

Claims:
Botanical/Herbal

Meito Sour Cream & Onion (Japan)

Meito Sour Cream & Onion comprises refreshing and aromatic sour cream made with domestically produced fresh cream fermented with lactic acid, and onion flavourings. It can be used with cracker and bread. The product retails in an 80g pack. Launched in early April, 2015 with an RRP of 291 yen.

Claims:
NA

DimmidiSì La Sopa Fresca Carrot and Pumpkin Cream (Spain)

Party-Tizers Dippin' Chips Kale, Carrot & Spinach Chip has been repackaged in a newly designed 5-oz. resealable pack featuring the Facebook and Pinterest logos. The kosher certified product is free from GMO, gluten, cholesterol, artificial flavors, colors, preservatives. The tortilla chips are suitable for vegans, and are made with premium ingredients.

Claims:
No Additives/Preservatives, Low/No/Reduced Allergen, Low/No/Reduced Cholesterol, GMO-Free, Convenient Packaging, Vegan, Kosher, Social Media, Gluten-Free, No Animal Ingredients, Premium

DF Irish Potato & Fresh Herb Soup (Ireland)

DF Irish Potato & Fresh Herb Soup is microwaveable. The product retails in a 500g pack.

Claims:
Microwaveable

Source: Mintel (2015)

Top Australian Parsley Launches:
L3M (May – July 2015)

Woolworths Select Roasted Mediterranean Wood Fired Pizza

Maggi Slow Cooker Honey Pork

Campbell's Real Stock Vegetable Stock

Basco Gluten Free Foods Creamy Chicken & Vegetable Instant Soup

Coles Garlic & Herb Chicken Breast Schnitzel

Local Hand Made Pulled Pork Char Sui Wrap

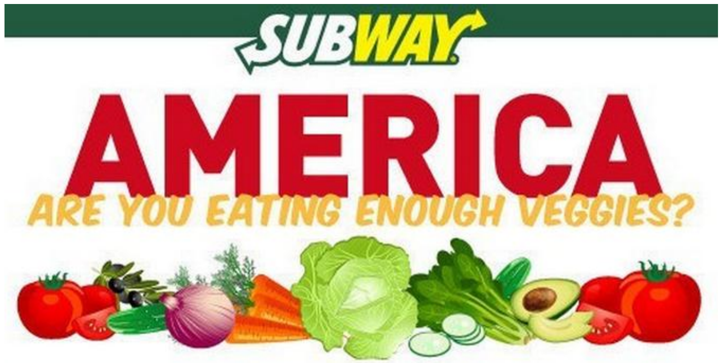
Simmone Logue Fine Food Chicken & Leek Cocktail Pies

Local Hand Made Lamb Greek Tzatziki Salad

Source: Mintel (2015)

In the Media.

Commodity News
(May – July 2015)



- A recent study conducted by SUBWAY® Restaurants found that the majority of Americans (84%) aren't meeting the USDA recommended minimum number of daily vegetable servings (four servings/two cups). The average American consumer only eats 2.3 servings of vegetables per day

- More concerning is the fact that 47% claimed that "nothing" prevents them from eating more vegetables, despite revealing that "overall health benefits" are their top motivation for vegetable consumption (70%).

http://thefoodpeople.co.uk/news/eighty-four-percent-of-americans-arent-eating-enough-vegetables-but-nearly-half-cant-tell-you-why?

SEEDS of CHANGE®

- Seeds of Change®, the leading producer of sustainably grown seeds and nutritious organic foods, is looking to raise awareness for the Save the Flavours campaign.

- The Flavour Availability Index has been developed and measures people's access to various foods by looking at 12 different data points. The plant varieties are then categorised on an endangerment metre of "abundant", "common," "limited," or "scarce."

- By eating this "limited" flavour, people can help create demand and save it. They aim to raise awareness and prevent generations from missing out on various unique flavours.

http://thefoodpeople.co.uk/news/seeds-of-change-launches-save-the-flavors-campaign-in-america

Commodity News
(May – July 2015)

- The 19th Annual Goomeri Pumpkin Festival was held on the 31st of May 2015.
- The event draws a crowd of approximately 14,000 people and includes a number of pumpkin based competitions such as The Great Australian Pumpkin Roll, Decorated Pumpkin and Giant Pumpkin competition.

http://www.abc.net.au/local/photos/2015/06/01/4246116.htm

- A trial carrot beer has been brewed in Brisbane, which has a bright orange colour.
- The beer is made of 16% carrot juice and uses produce that may otherwise be wasted.
- Depending on its economic viability and taste-test, the carrot beer may eventually be produced on a larger scale.

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

- Cauliflower has become the newest food craze due to its low-starch, high-nutrition and cancer-fighting characteristics. It is rich in Vitamin C, providing 73% of the recommended daily value with each serve.
- This vegetable is highly versatile and people are experimenting with preparations that are way outside the box.

http://www.care2.com/greenliving

- The US Department of Agriculture are currently deliberating whether environmental considerations are to be included when deciding if a food is healthy.
- Beans would most likely be classified healthy under this criteria as they are packed with protein, fibre and folic acid. It is also available everywhere and has a relatively small carbon footprint.

http://www.theguardian.com/lifeandstyle/

Commodity News
(May – July 2015)

- There was no relevant baby broccoli news released in the last three months.

- People are being urged to throw out bags of Italian parsley from a particular herb producer in New Zealand after tests showed traces of potentially deadly listeria.
- The producer supplies more than 30 supermarkets and shops throughout New Zealand.

http://www.stuff.co.nz/business/small-business/

- There was no relevant baby broccoli news released in the last three months.

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 25, July 2015) focuses on:

- Pumpkin
- Carrot
- Cauliflower
- Beans
- Baby Broccoli
- Parsley
- Silverbeet

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

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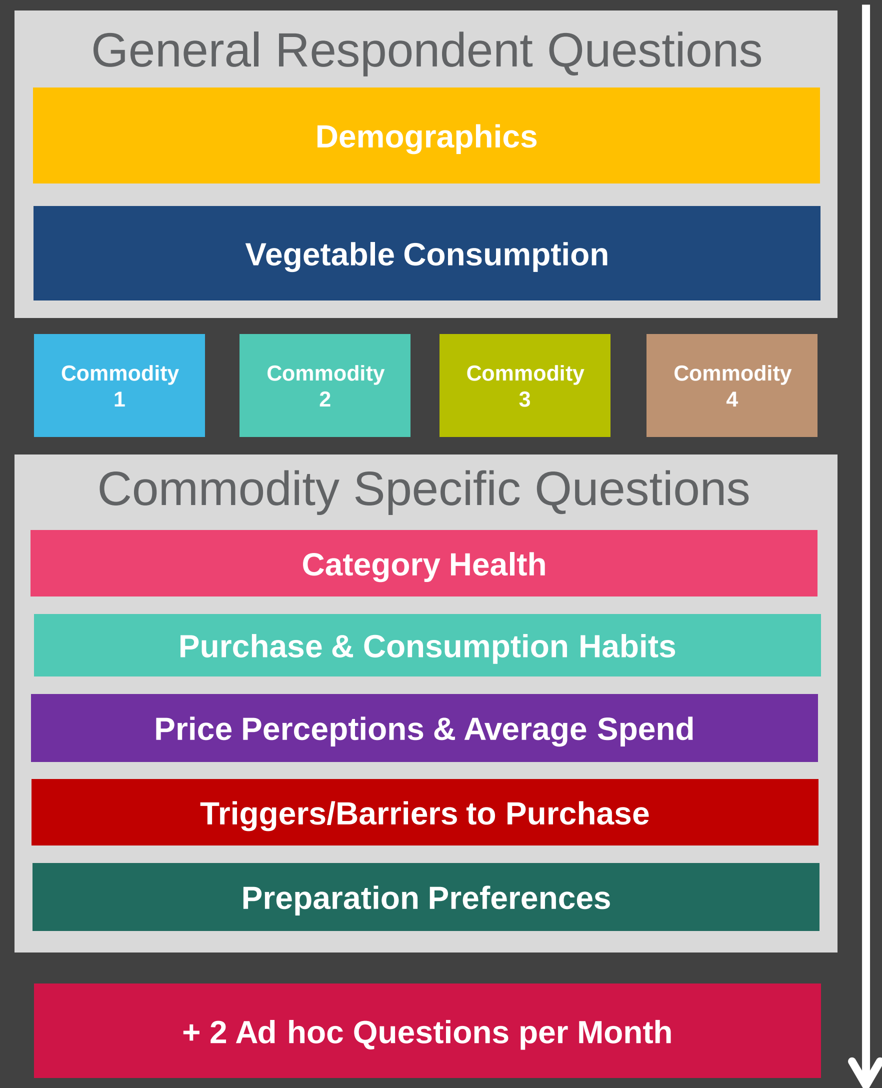
Online Methodology.

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

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 (pumpkin, carrot, cauliflower, beans, baby broccoli, parsley, silverbeet) within the last month
- Were the main or joint grocery buyer

	Pumpkin n=304	Carrot n=305	Cauliflower n=305	Beans n=306	Baby Broccoli n=205	Parsley n=201	Silverbeet n=203
Gender							
Male	31%	37%	36%	37%	43%	50%	40%
Female	69%	63%	64%	63%	57%	50%	60%
Age							
18-24 y.o.	3%	6%	6%	7%	0%	3%	2%
25-34 y.o.	18%	19%	18%	23%	8%	9%	9%
35-44 y.o.	21%	21%	19%	20%	16%	16%	11%
45-54 y.o.	17%	18%	20%	17%	20%	23%	14%
55-64 y.o.	19%	18%	19%	20%	35%	29%	38%
65+ y.o.	22%	19%	19%	14%	21%	19%	26%
Household							
Single Income no Kids	21%	21%	19%	19%	19%	19%	20%
Double Income no Kids	18%	23%	20%	22%	16%	19%	16%
Young Families	19%	18%	20%	21%	12%	12%	10%
Established Families	19%	18%	20%	21%	18%	20%	23%
Empty Nesters	23%	19%	22%	19%	36%	29%	32%
Location							
New South Wales	17%	19%	15%	19%	18%	17%	16%
Victoria	16%	15%	15%	17%	14%	15%	19%
South Australia	18%	17%	20%	19%	19%	15%	12%
Queensland	20%	20%	19%	20%	16%	16%	16%
Western Australia	19%	18%	19%	17%	17%	18%	13%
Tasmania	5%	7%	8%	7%	10%	13%	21%
Australian Capital Territory	4%	4%	3%	2%	7%	5%	2%
Northern Territory	1%	1%	0%	1%	0%	2%	1%

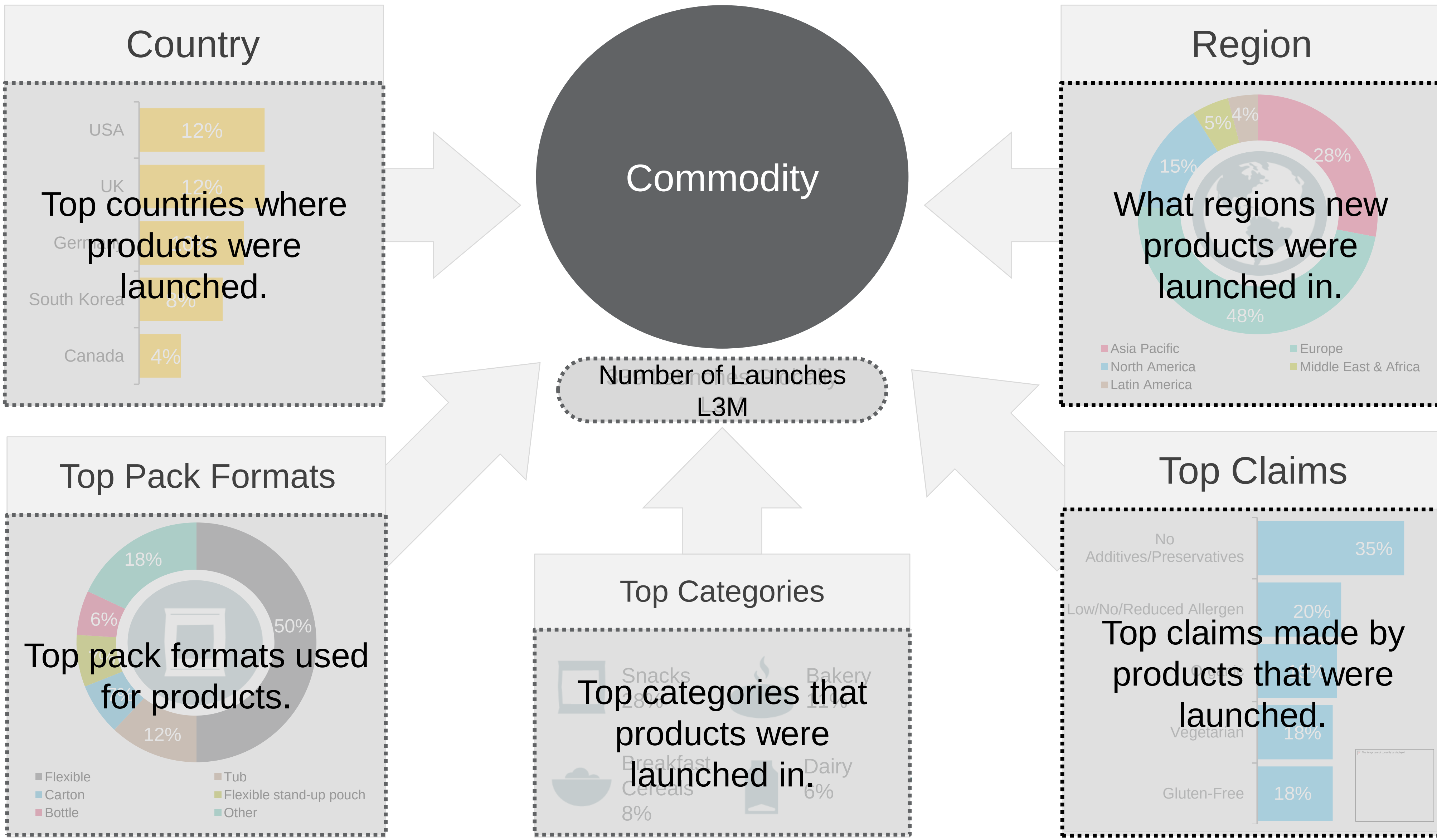
Trends Research: Our Approach

- 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.

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