



Project Harvest Monthly Tracker Report.

Wave 27, August 2015

Vegetables tracked: Cabbage, Celery,
Cucumber, Zucchini, Eggplant, Spring
Onion, Radish

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

**Horticulture
Innovation**
Australia



colmar brunton.



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Wave 27: Executive Summary



Industry Insight

Two academic studies published this year suggest a link between how often people go shopping and the healthiness of the food they buy*. These publications suggest that more frequent shopping trips lead to more expenditure and consumption of fresh produce, and conversely, that large supermarkets prompt us to shop less often and buy less. Interestingly, a study published in 2014 also revealed a positive relationship between supermarket size and a nation's obesity prevalence.

With Australia's large supermarket duopoly and the seemingly dwindling number of smaller grocers, it may be more important than ever to know where the trend in retail is heading.

If trends in consumer sentiment tells us one thing, it's that the near future will be all about customising convenience and optimising health. A trickle of this stream may have already begun, with the growing popularity of dinner kit services in Australia and beyond. These generally aim to get you back in the kitchen as a confident, from-scratch cook by home-delivering the fresh ingredients needed to cook a delicious meal in under 30 minutes. It also means spending less time in the supermarket - not at the expense of health but for more time at the table and with fresh produce that is always that. Fresh!

Industry Insight cont.

Home-delivered food is not new news of course, but the modern dinner kit has hit a sweet spot between wanting convenience, wanting healthy options, wanting to be a from-scratch cook and wanting to reduce waste. The shop front is a home page. The offer is customised to be homely, organic, low fat or even Paleo. It is not unusual to see advertising for Hello Fresh, Caveman Kitchen, My Dinner Box or Light n Easy on a daily basis. As different as the suppliers may be in terms of food style, the one thing they have in common is fresh ingredients and so this is a call out to all Australian growers! Take the opportunity to make your produce available via dinner kits – these often claim to be fresher than those you could buy at the supermarket and can be delivered more frequently than some of us might shop. An exciting development given the potential effect that shopping at large supermarkets may be having on our health.

*Gustat et al in Preventive Medicine Reports, 2015; Rudi & Cakir, European Association of Agricultural Economics, 2015; Cameron et al. in BMX Obesity, 2014.



Wave 27 Fast Facts

- Consumers are highly satisfied with cabbage and are likely to recommend to friends and family. Future purchase intent remains strong.
- On average cabbage is purchased 3 times per month and consumed on 7 occasions per month. Mainstream retailers are the typical purchase locations.
- Relatively consistent with previous months, 1.1kg of cabbage is typically purchased. Value for money increased this wave – consumers perceiving fair value. Individual whole cabbages are the preferred format.
- Overall awareness of cabbage types remains relatively low. Nearly half of consumers are unable to recall any variety of cabbage. The most recalled variety was red/purple, consistent with past waves.
- The key motivations for purchasing cabbage are its ease to cook with and to use as an ingredient in dishes. The main barriers to purchase are not wanting to waste any, wanting a variety of vegetables in their diet and cabbage not being available in their area.
- Cabbage is expected to remain fresh for well over a week. Expectations of freshness are mostly being met and slowly improving over waves.

7.6
times per month

is the average number of times Australians are consuming cabbage – which is higher than previous waves.

1.

Insight:

There has been a noticeable increase in taste as a trigger to future purchase.

Short Term Recommendation:

Differentiate multiple varieties of cabbage with specific flavour profiles highlighting the taste it will bring to dishes and suitability for cuisine types outside of Chinese.

2.

Insight:

Positively, consumption and purchase are on the rise, however consumers are lacking inspiration when it comes to meal ideas.

Long Term Recommendation:

Investigate development of cabbage products that create new meal occasions including lunch and snack options that will continue growth of the category.





Celery Grower Action Plan.

Wave 27 Fast Facts

- ▶ Celery continues to perform below average on the majority of category health and consumer sentiment measures, except for satisfaction.
- ▶ Celery was purchased three times per month and consumed on average nine occasions per month, relatively consistent with the previous wave.
- ▶ Consumers prefer to purchase whole bunches of celery. Recalled last spend is \$2.80, marginally higher than in Wave 23. Overall celery is perceived to be good value for money, similar to past waves.
- ▶ Price tracking indicated the average price per bunch of celery in August rose to \$2.63 from \$2.27 in April, returning to similar prices in December 2014 Wave (\$2.74).
- ▶ Spontaneous awareness of celery types remains very low, with 82% of respondents unable to state a type.
- ▶ Top triggers to purchase are to use as an ingredient in dishes, health and adding variety. Not wanting to waste any is the main barrier to purchase.
- ▶ Consumers expect celery to remain fresh for ten days, improving over recent waves.

\$2.80

was the recalled last spend on Celery in August 2015.

1.

Insight:

Freshness, longevity and expectations are on the rise, yet value for money perceptions remain stable.

Short Term Recommendation:

Communicate freshness through date of harvest and best before dates in-store and on-pack. This should increase assurance in quality of the celery and in-turn strengthen value for money perceptions.

2.

Insight:

One fifth of consumers indicate that lack of availability in their area is a barrier to future purchase.

Long Term Recommendation:

Explore supply chain opportunities outside of mainstream retailers, in particular purchase from markets and independent retailers, as these channels are on the rise.





Cucumber Grower Action Plan.

Wave 27 Fast Facts

- ▶ Consumers are generally satisfied with cucumbers, which is above the Vegetable Average. Furthermore, there is strong future purchase intent which is consistent with past waves.
- ▶ Cucumber is purchased on average 4 times per month and consumed around 12 times per month. Purchase is primarily made through mainstream retailers.
- ▶ Weight of purchase has remained consistent over the past 3 waves, with consumers purchasing on average 800g of Cucumber.
- ▶ Price tracking of Lebanese cucumbers reveals a national average of \$5.76 per kg in August, which is higher than the previous wave (\$5.37 per kg in April).
- ▶ Recall of cucumber types and varieties is slightly lower with awareness of almost all varieties decreasing. Lebanese and Continental types hold the greatest recall.
- ▶ Cucumber is expected to stay fresh for just over a week, with expectations generally met.
- ▶ Key drivers of purchase are predominately influenced by taste and health. Barriers to purchase are not wanting to waste any and wanting a variety of vegetables.

8.1 days

is the number of days cucumbers are expected to remain fresh.

1.

Insight:

Australian provenance is very important to consumers when purchasing cucumbers.

Short Term Recommendation:

Highlight Australian grown cucumbers at point of sale. For retailers, ensure adequate supply of Australian grown to limit the need to import cucumber, as this has a negative impact on consumer satisfaction.

2.

Insight:

There are clear cucumber consumption patterns, which are affected by seasonality i.e. decreased consumption in cooler months.

Long Term Recommendation:

Promote seasonal appropriate recipes in-store such as salads and snacking ideas in summer, and quick roasting side dishes in winter.





Zucchini Grower Action Plan.

Wave 27 Fast Facts

- ▶ Zucchini has improved this wave in terms of perceived importance, which now sits in line with the Vegetable Average. Consumers also remain satisfied with the current range available.
- ▶ Consumers purchase zucchini on average 4 times per month and consumption 8 times. Key retailers for zucchini purchase remain mainstream and specialist stores.
- ▶ Weight of purchase (700g) and value for money (6.5/10) remained stable, while recalled last spend dropped marginally to \$3.00.
- ▶ Zucchini national average price is notably higher at \$5.12 per kg in August 2015 compared to 4.09 per kg in April 2015.
- ▶ Awareness of zucchini types remains very low, with three quarters of consumers unable to name a variety. Those who can are largely prompted by colour.
- ▶ Zucchini is expected to remain fresh for over a week, slightly higher than the previous wave, with expectations of freshness more likely to be met.
- ▶ Top triggers to purchase are ease of preparation and to use as an ingredient in dishes. Consumers limit purchase of zucchini because they want variety in their diets and don't want to waste any.

8.2
times per
month

is the average number of times Australians are consuming zucchini.

1.

Insight:

Consumption of zucchini has continually increased across waves. Recent food trends such as the paleo diet and zucchini chips may have influenced this increase.

Short Term Recommendation:

Promoting the various health benefits of zucchini and the healthy ways it can be cooked such as fritters, pastas and chips will help inspire consumers to be more creative with their zucchini dishes.

2.

Insight:

The main barrier preventing shoppers from purchasing zucchini is that they do not want to waste any.

Long Term Recommendation:

Encourage consumers to use the whole zucchini by providing recipes to utilise all parts of the vegetable, including the skin, flesh, stem and flowers.





Wave 27 Fast Facts

- ▶ Eggplant has low importance and satisfaction relative to the Harvest average, however holds strong levels of interest, endorsement and future purchase intent.
- ▶ Purchase occasions have declined in the past three waves, whilst average consumption is between four to five times per month. Mainstream and specialist retailers are the main outlets for purchase.
- ▶ Consumers purchase 900g of eggplant per shop, which is in line with the previous wave. Recalled last spend is lower at \$3.90 with value for money perceived as fair.
- ▶ Pricing analysis revealed the national average price for purple eggplant is \$9.84 in August, which is substantially higher than \$6.94 per kg in April.
- ▶ Unprompted awareness of eggplant types remains low, with two thirds of consumers unable to recall a type.
- ▶ Key influences to purchase are using as an ingredient in dishes, adding variety to their vegetable selection and taste. Key barriers to purchase are already consuming enough for their needs and that they are expensive.
- ▶ Eggplant is expected to remain fresh for around 8 days, down from the previous wave. This freshness is generally being met.

\$9.84
per kg

is the average price per kg for eggplants in August 2015.

1.

Insight:

There was a substantial rise in the retail price for eggplants, as well as expense increasing as a barrier to purchase this wave.

Short Term Recommendation:

Explore efficiencies in supply chain as well as reasons for limited availability of eggplants to prevent sharp increases in price, as this will deter consumers from future purchase.

2.

Insight:

This wave saw a large increase in cooking eggplant in Italian cuisine. Eggplant is typically accompanied with tomatoes.

Long Term Recommendation:

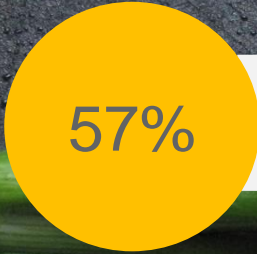
Lack of innovation in the Australian market provides an opportunity to develop new, convenient, pre-prepared eggplant options including ready-to-make parmigiana kits, focussing on Italian cuisine.



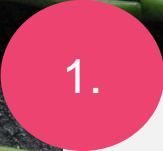


Wave 27 Fast Facts

- There are medium levels of interest for spring onion, with consumers likely to recommend it to family and friends. There is low future purchase intent, with a majority of consumers indicating they intend to purchase the same amount as they currently do.
- Purchase frequency of spring onion is nearly 3 times per month and on average is consumed on seven to eight occasions per month.
- On average, consumers purchase 400g of spring onion and recalled spending \$2.40 on their last shop.
- Analysis of pricing nationally revealed an average price of \$2.37 each. Spring onion is perceived to fair value for money (6.2/10).
- Awareness of spring onion varieties is very low, with 85% unable to recall a type.
- To use as an ingredient in dishes and complementing other foods are the primary triggers to purchase. Not wanting to waste any is the main barrier to purchase.
- Consumers expect spring onion to remain fresh for over a week, and this longevity is likely to be met most of the time.



of consumers use spring onion in Chinese cooking cuisine.



1.

Insight:

Almost half of consumers are concerned with not wanting to waste any spring onion. This is the main barrier to future purchase.

Short Term Recommendation:

Provide alternate format options such as loose spring onion stalks and pre-packaged trays that will help reduce perceptions of wastage.



2.

Insight:

Spring onion is not typically used as a main ingredient in dishes, with 61% of consumers stating they use it to complement other food.

Long Term Recommendation:

Educate consumers on the versatility of spring onions by highlighting its potential uses similar to that of white and red onions. This may allow spring onions to become more than just a garnish used in meals.





Wave 27 Fast Facts

- Importance and satisfaction for radish is below the Harvest average for all vegetables tracked thus far. However, there are high levels of endorsement, interest and future purchase intent.
- Radishes are purchased on average four times per month and consumed nine times per month. Purchase is primarily from mainstream retailers and specialist retailers.
- On average consumers are purchasing 600g of radish. Recalled last spend was \$3.40, with value for money perceived to be fair (6.3/10).
- Price tracking revealed an average price of \$2.70 per bunch.
- Awareness of radish types is very low, with two-thirds of consumers unable to recall a type.
- The main motivations for purchasing radish are taste, texture and colour. Already consuming enough and not wanting to waste any are the key barriers to purchase.
- Radish are expected to stay fresh for just over a week. Expectations of freshness are met most of the time.

\$2.70
per bunch

was the average price per bunch of radishes this month.

1.

Insight:

Consumers knowledge of cooking styles are limited. The majority of consumers eat radishes raw and in salads.

Short Term Recommendation:

Provide consumers with recipe ideas and cooking techniques at point of sale to encourage creativity to provide a new element to their dishes.

2.

Insight:

Taste, texture and colour are the key triggers to purchase.

Long Term Recommendation:

Encourage trial of radishes by providing texture and flavour descriptors. This will assist in allowing radish to be more relevant to consumers, especially in the cooler months, where salads are less popular.





Wave 27:
Response to Ad hoc
Questions



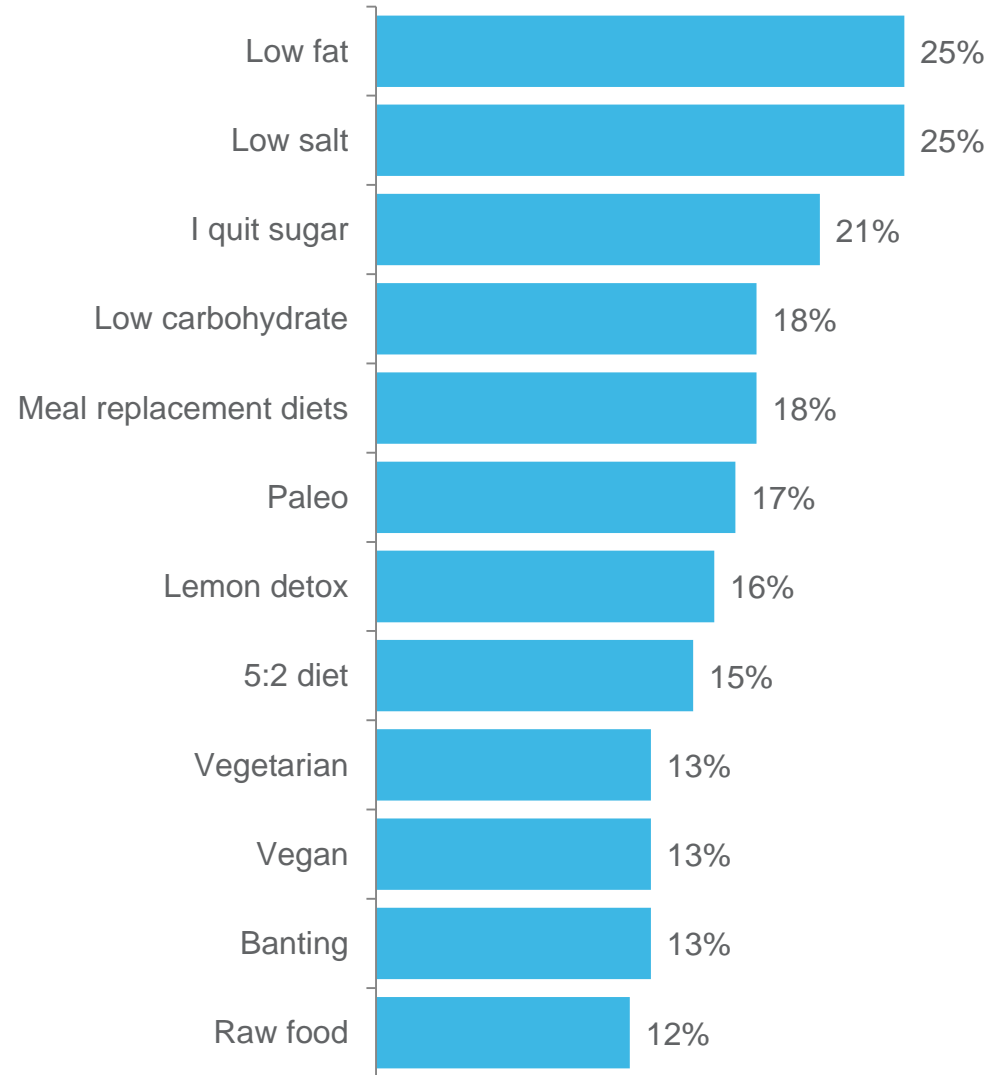


Avoiding Food Groups.

Dietary Requirements/Lifestyle Choices.

More than one in five consumers are actively avoiding fat, salt and sugar in their diets.

Diets that promote the consumption of vegetables (vegetarian, vegan and raw food diets) are supported by one in ten consumers.

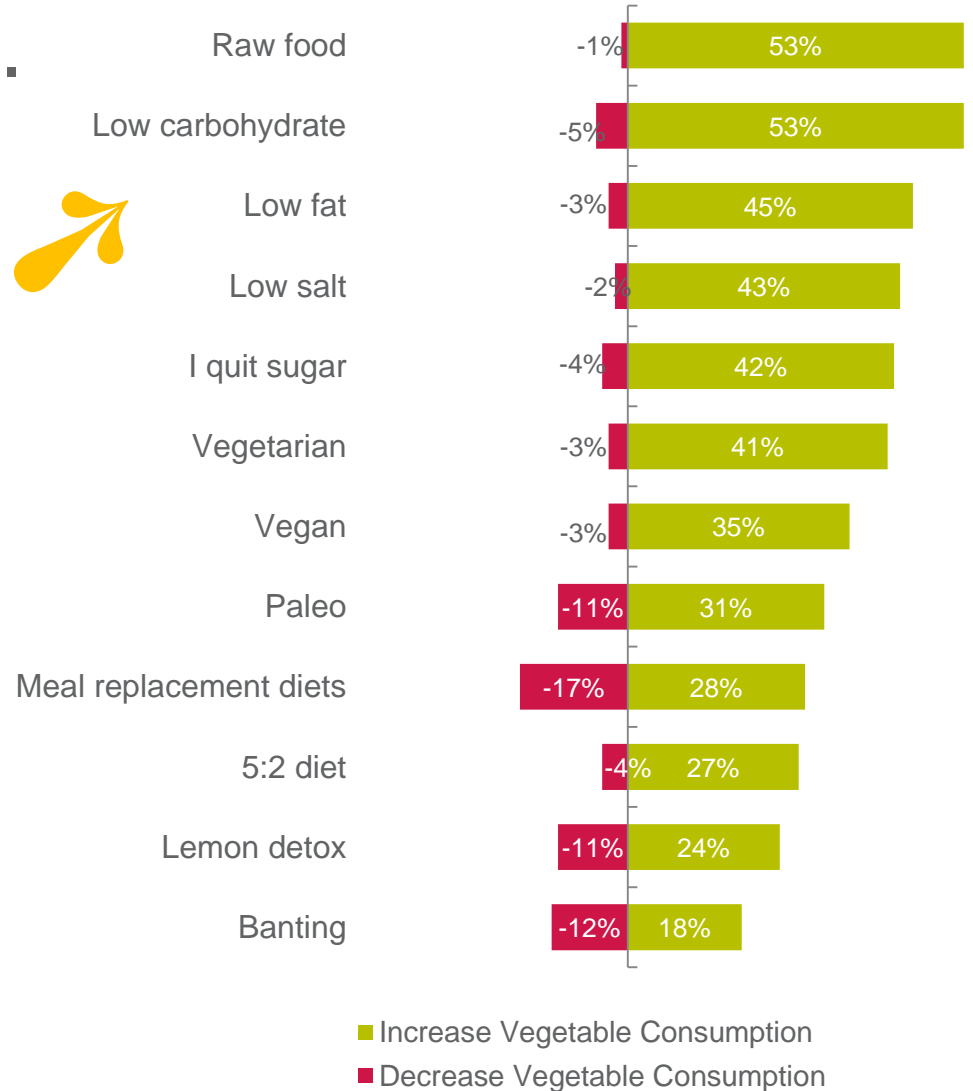




Vegetable Consumption. Dietary Requirements/Lifestyle Choices.

Over half of all consumers who are following a raw food or a low carbohydrate diet indicate that their vegetable consumption has increased by following these lifestyle choices.

As an industry, there is an opportunity to partner with raw food and low carb diet promoters to make vegetables the hero of meals, rather than side dishes and accompanying ingredients. Keeping vegetables top of mind with these consumers should have a positive impact on purchase and consumption.





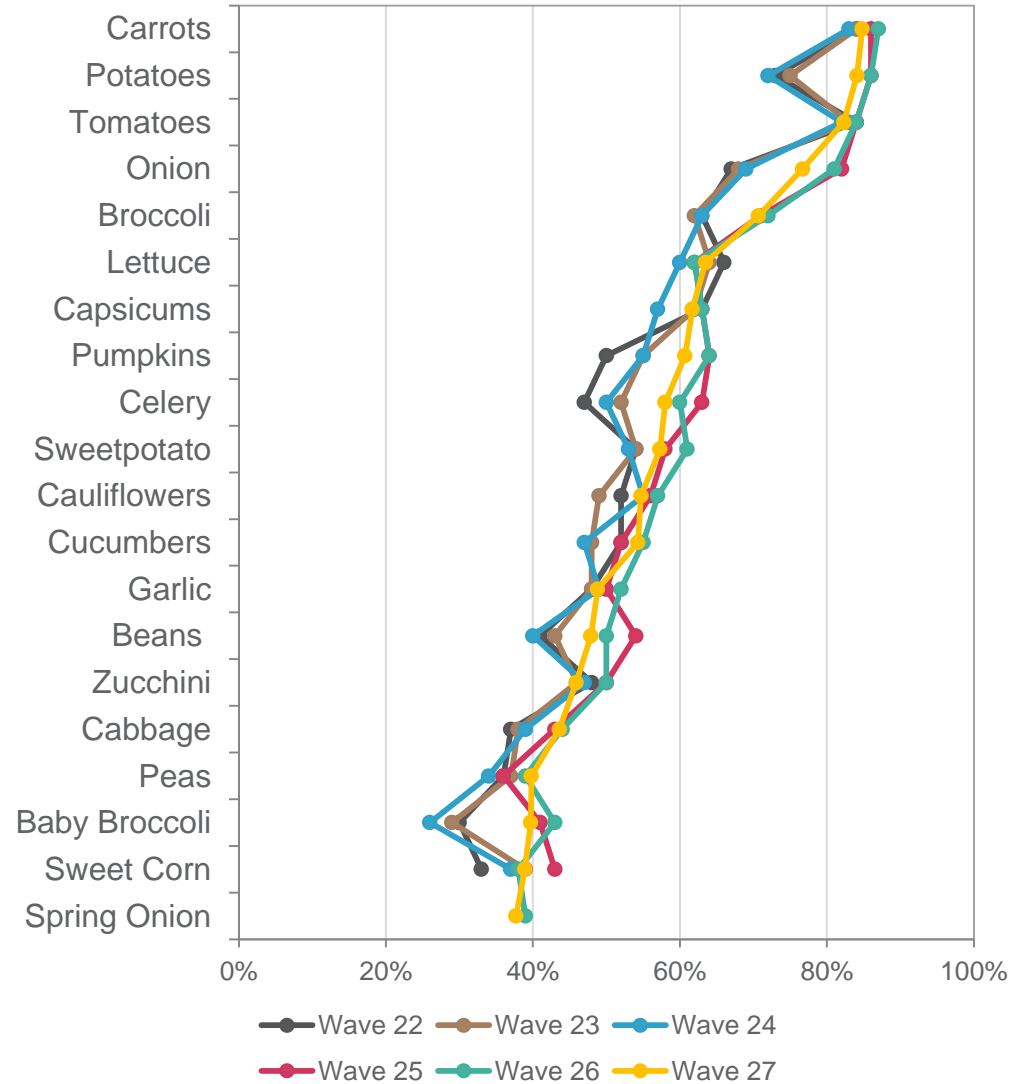
Wave 27: Overall Vegetable Tracking





Vegetables Purchased Last Month

- Carrots, potatoes tomatoes and onion are the most purchased vegetables in August, consistent with past months.
- Purchase of fresh vegetables is in line with past months.



Sample Wave 27, N=1082
 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 Vegetable Average is the average of all commodities tracked thus far.

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





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

Both eggplant and radish have strong future purchase intent, whilst other vegetables are relatively consistent with the Vegetable Average.

	Cabbage	Celery	Cucumber	Zucchini	Eggplant	Spring Onion	Radish	Vegetable Average
Importance	6.7	6.1	6.3	6.3	5.8	6.5	6.1	6.3
Satisfaction	7.3	6.9	6.9	6.9	6.6	6.8	6.2	6.6
Endorsement	7.0	6.7	6.7	7.2	7.4	6.7	7.2	6.9
Interest (New Varieties)	6.5	5.8	6.3	6.3	6.6	6.2	6.8	6.2
Future Purchase								
More	16%	11%	18%	15%	23%	6%	24%	15%
Same	83%	88%	80%	83%	76%	94%	76%	83%
Less	1%	2%	2%	2%	0%	0%	0%	2%

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



Cabbage.



Consumption and purchase frequency this wave were the highest recorded. On average, consumers purchased cabbage three times a month, with seven consumption occasions.

Coles and Woolworths were the main channels for purchase. Consumers were also likely to purchase from specialist retailers.



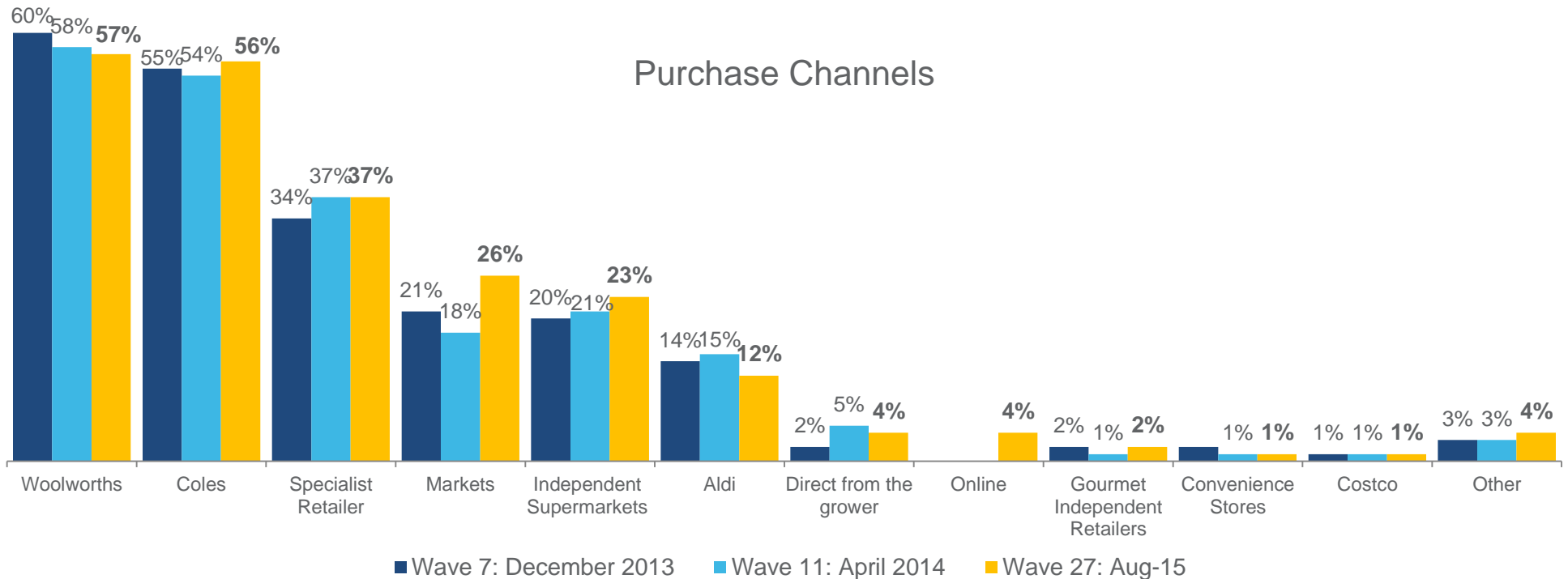
▼ 3.1 times, Wave 7

▼ 2.6 times, Wave 11



▼ 6.8 times, Wave 7

▼ 6.3 times, Wave 11



Q1. On average, how often do you purchase <commodity>?
 Q2. On average, how often do you consume <commodity>?
 Q5. From which of the following channels do you typically purchase <commodity>?
 Sample Wave 7, N=317, Wave 11 N=304 and Wave 27 N=301



Average Spend and Price Sensitivity



Average weight of purchase

The average consumer typically purchased **1.1kg** of Cabbage in August 2015, this has slightly increased upon previous waves.

- ▼ 1.0kg, Wave 7
- ▼ 1.0kg, Wave 11



Recalled last spend

The average recalled last spend was **\$3.20** in August, higher than in previous waves.

- ▼ \$3.00 Wave 7
- ▼ \$2.70, Wave 11



Value for money

On average, consumers perceived Cabbage to be good value for money **(6.8/10)**, which has improved this wave.

- ▼ 6.5/10, Wave 7
- ▼ 6.3/10, Wave 11

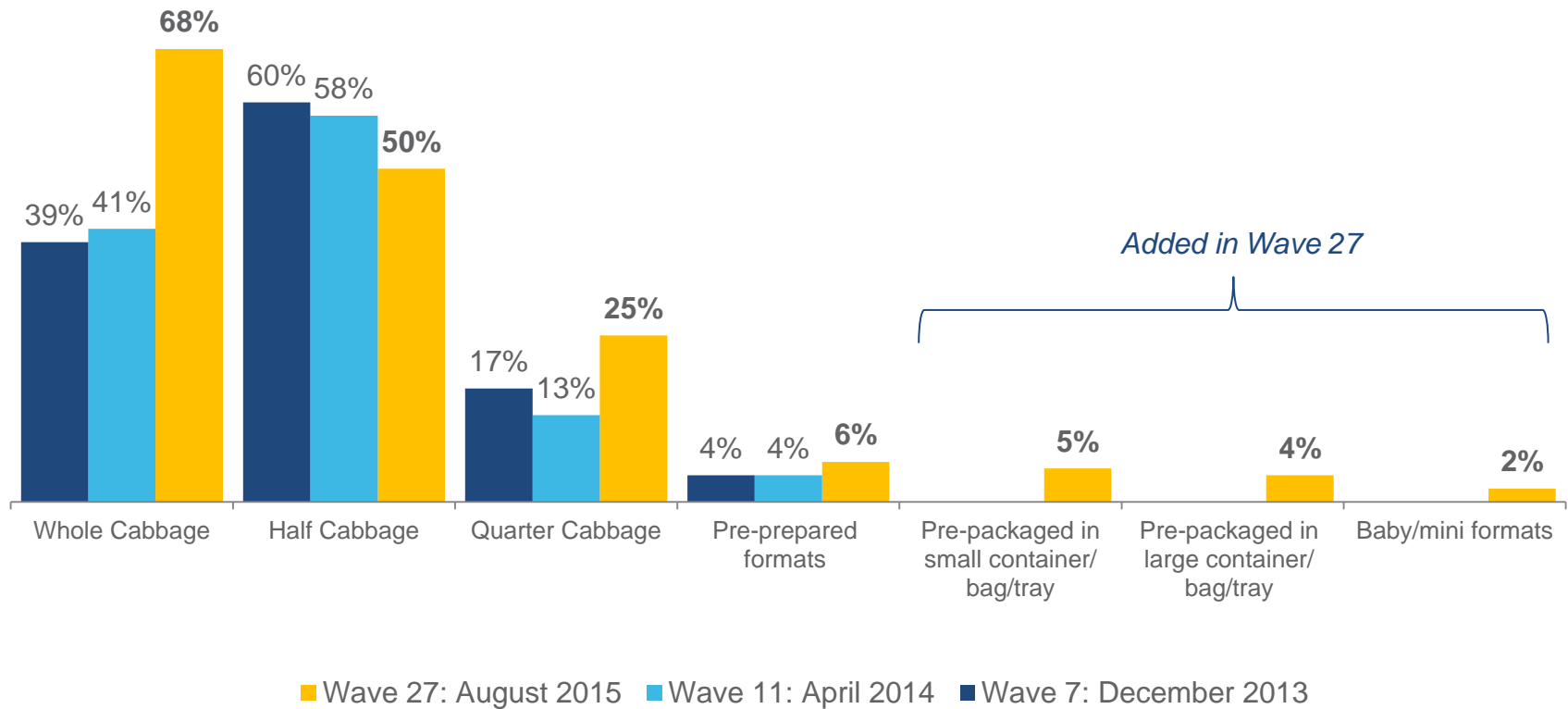
Q3. How much <commodity> do you typically purchase when you shop for it?
 Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
 Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
 Sample Wave 7, N=317, Wave 11 N=304 and Wave 27 N=301



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



Individual whole cabbages were the most common format purchased this wave. This sees a major shift from half cabbages being the main format purchased in previous waves.

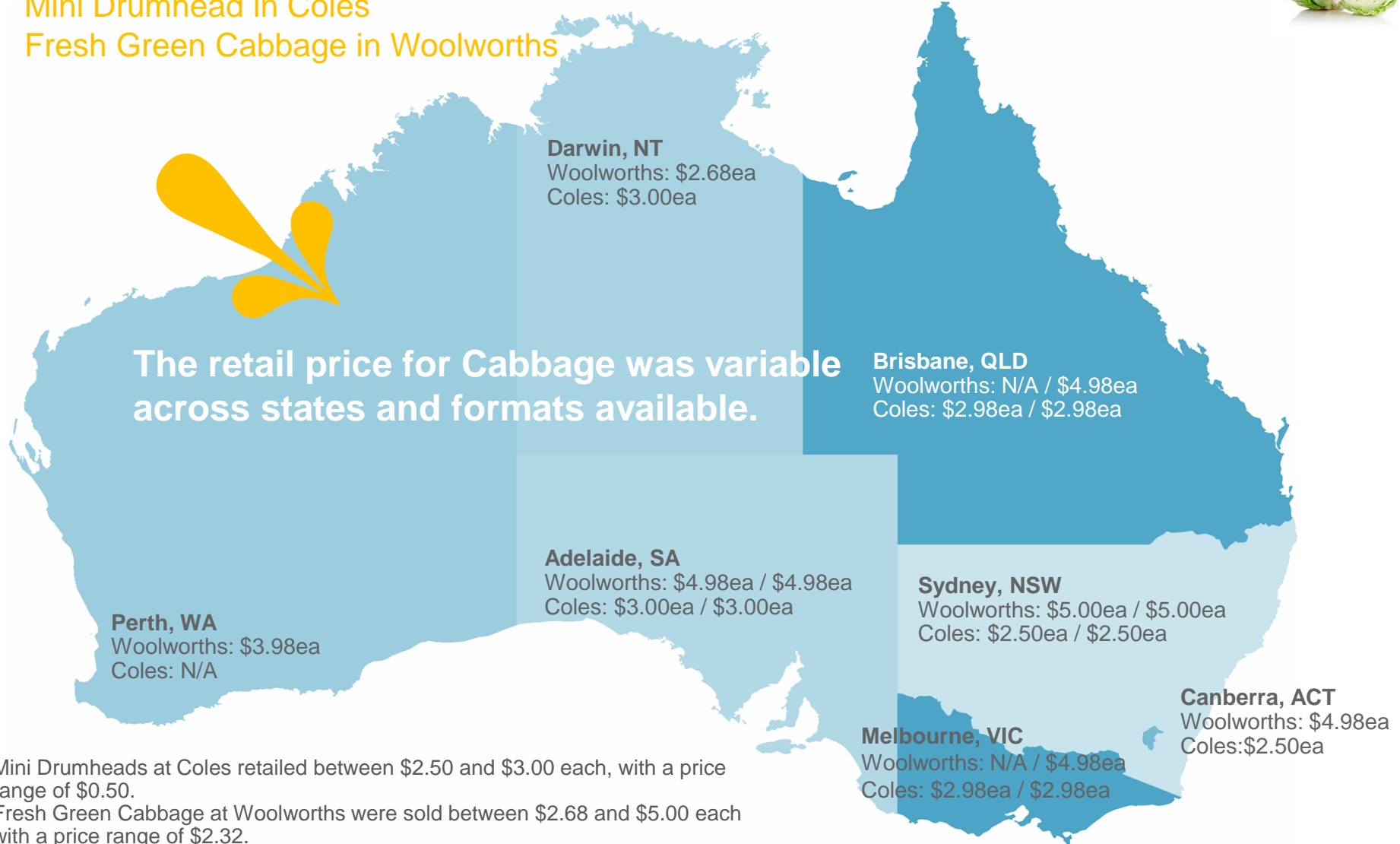


Online and In-store Commodity Prices



Mini Drumhead in Coles

Fresh Green Cabbage in Woolworths



The retail price for Cabbage was variable across states and formats available.

- Mini Drumheads at Coles retailed between \$2.50 and \$3.00 each, with a price range of \$0.50.
- Fresh Green Cabbage at Woolworths were sold between \$2.68 and \$5.00 each with a price range of \$2.32.

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

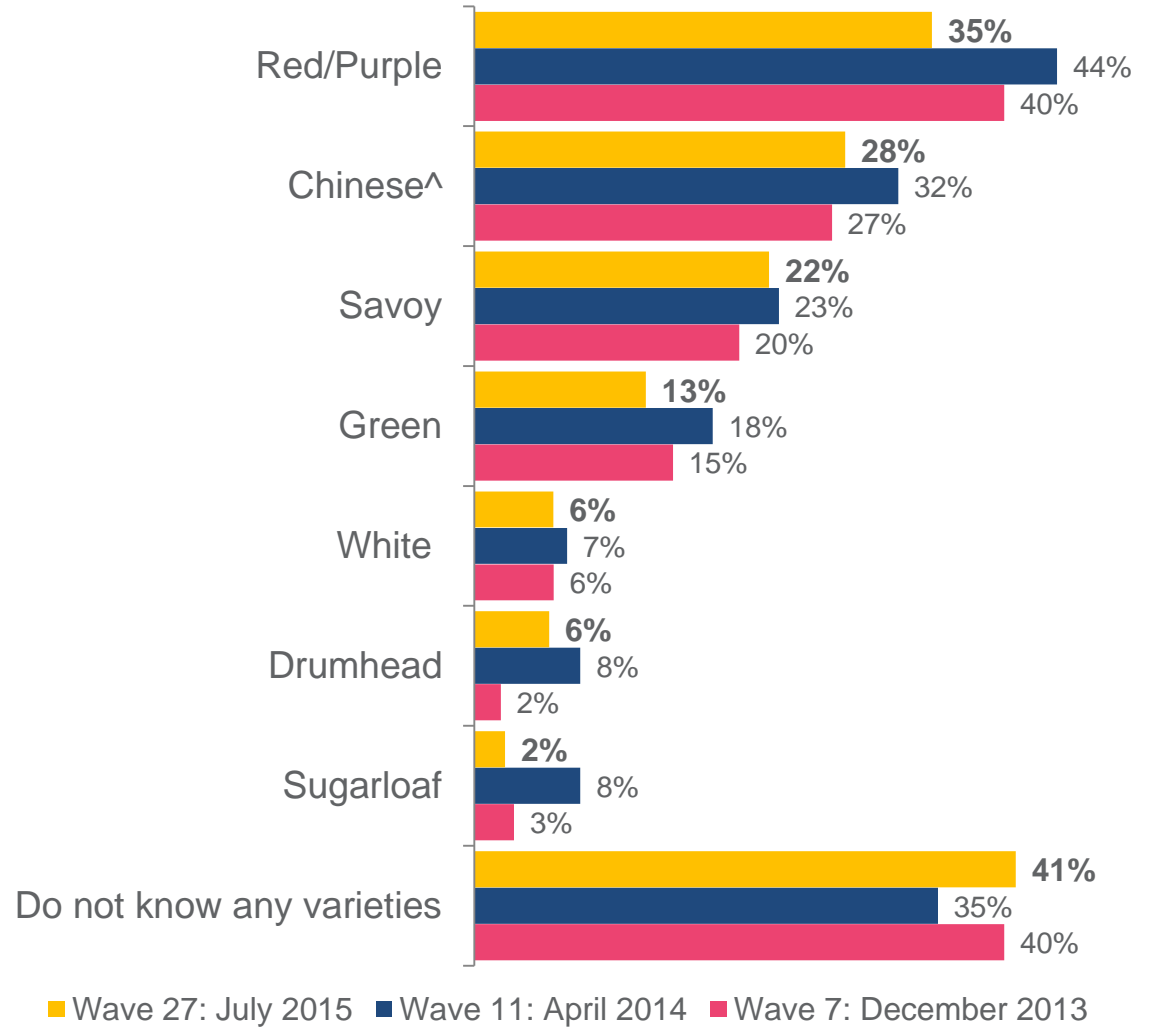
Hobart, TAS
Woolworths: \$4.98ea
Coles: \$2.98ea



Spontaneous Awareness

41% of consumers were unable to recall a type of cabbage.

Red/Purple varieties remained the most recalled type of cabbage, which has decreased from previous waves.



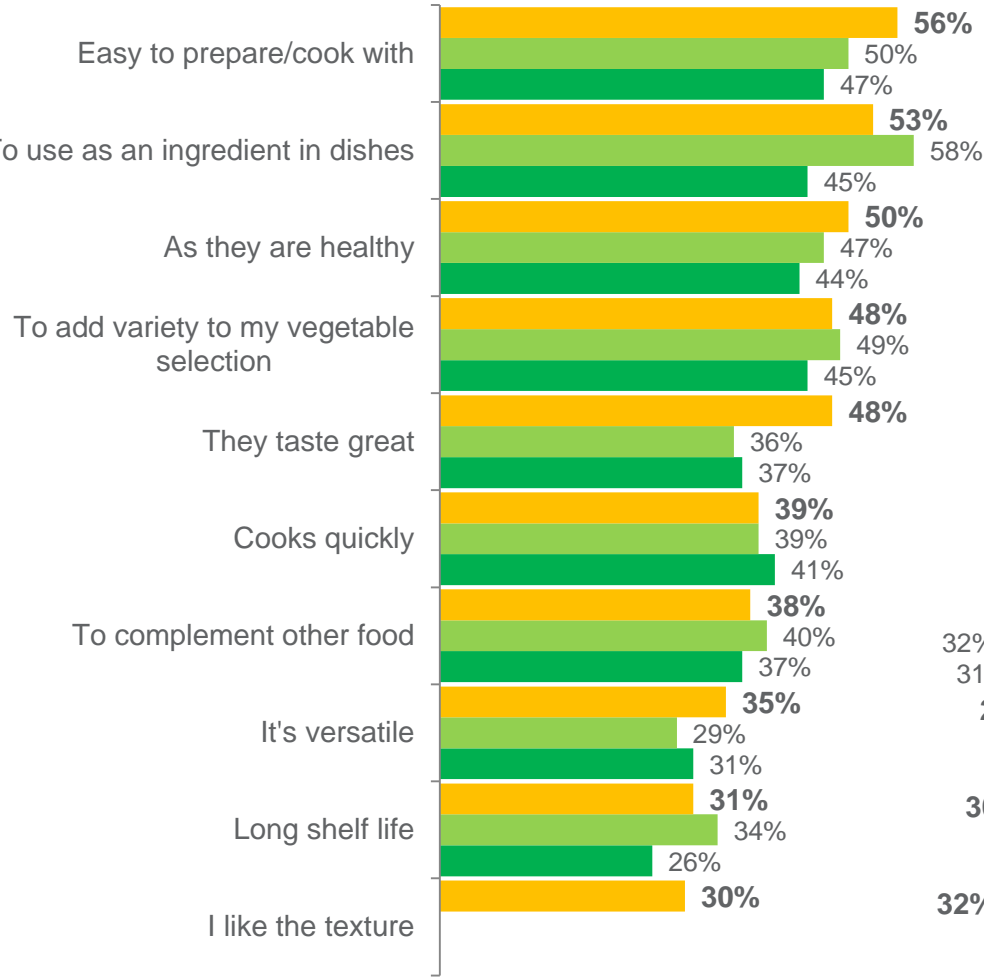
Q6a. What varieties of <commodity> are you aware of? (unprompted)
[^]There was a level of misattribution that Wombok (Chinese) is a type of cabbage
 Sample Wave 7, N=317, Wave 11 N=304 and Wave 27 N=301



Ease of preparation and use as an ingredient in dishes are key influences on purchase. The main barriers to purchase are that people don't want to waste any and also want a variety of vegetables in their diet. Additionally, a large percentage of respondents claimed that cabbage was not available in their area.

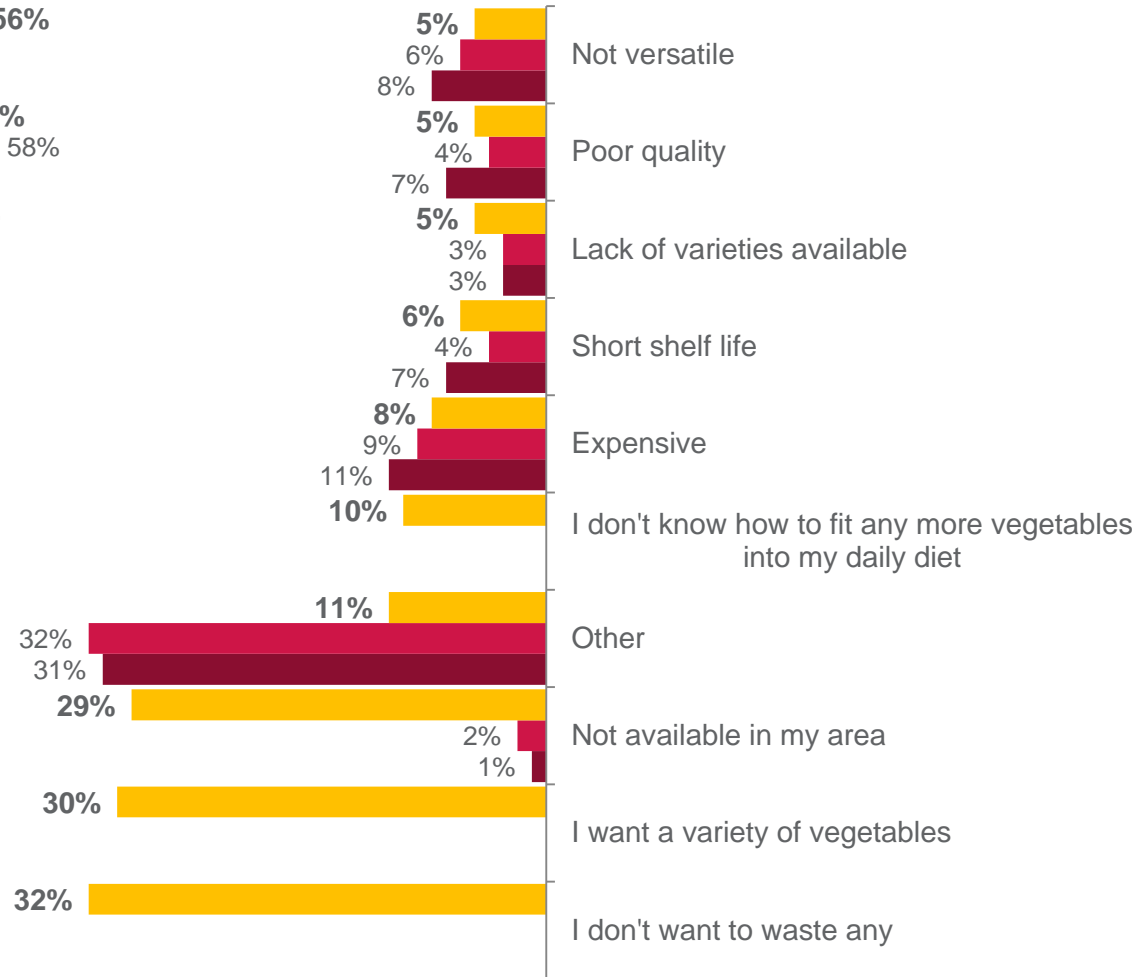


Triggers



■ Wave 27: Aug-15 ■ Wave 11: Apr-14 ■ Wave 7: Dec-13

Barriers



■ Wave 27: Aug-15 ■ Wave 11: Apr-14 ■ Wave 7: Dec-13



Q7. Which of the following reasons best describes why you purchase <commodity>?
 Q8. Which reason best describes why you don't buy <commodity> more often?
 Sample Wave 7, N=317, Wave 11 N=304 and Wave 27 N=301



Chinese cuisine remained the most popular cuisine cooked. Traditional and Modern Australian cuisine are also popular options.

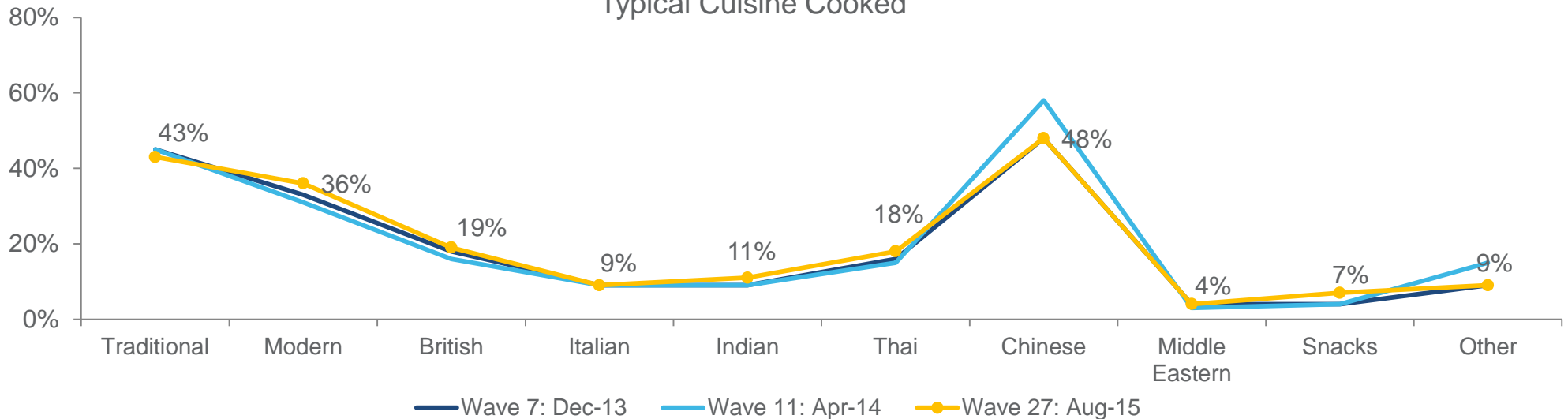
Dinner was the key consumption occasion, followed by family meals and weekday meals.

Top 5 Consumption Occasions



Dinner	72%
Family meals	57%
Weekday meals	47%
Weekend meals	40%
Quick meals	37%

Typical Cuisine Cooked



← Australian → ← European → ← Asian → ← Other Cuisines →

Q10. What cuisines do you cook/consume that use <commodity>?
 Q11. Which of the following occasions do you typically consume/use <commodity>?
 Sample Wave 7, N=317, Wave 11 N=304 and Wave 27 N=301



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

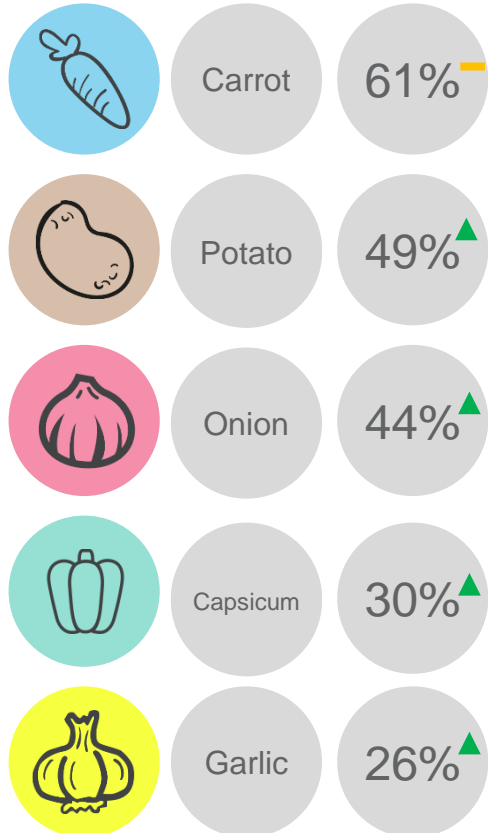


Cabbage was typically served with carrots, potatoes and onions. This is consistent with past waves.



The most common cooking method was stir-frying, which has increased since Wave 11, and is in line with the popularity of Chinese cuisine.

Accompanying Vegetables



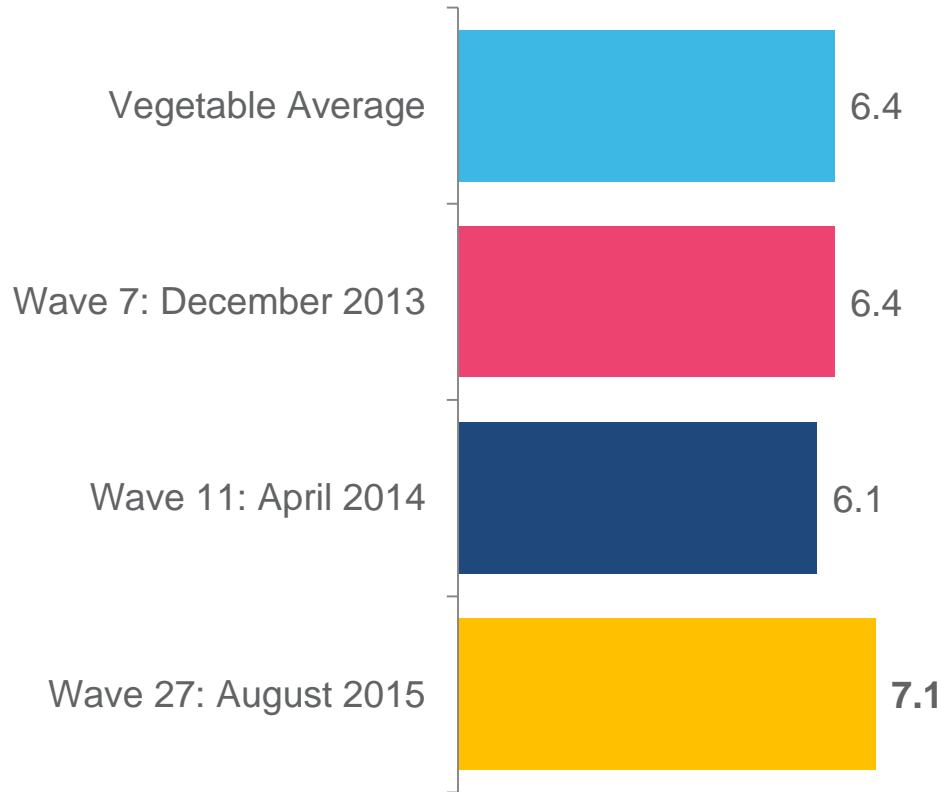
Top Cooking Styles

	Wave 27
Stir frying	62%
Raw	41%
Steaming	39%
Soup	30%
Boiling	28%
Sautéing	25%
Frying	20%
Slowing Cooking	18%
Microwave	10%
Baking	5%

Q9. How do you typically cook <commodity>?
 Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
 Sample Wave 7, N=317, Wave 11 N=304 and Wave 27 N=301



Importance of provenance has substantially increased this wave. Knowing that cabbages are grown in Australia is the most important provenance information for consumers.



Q14. When purchasing <commodity>, how important is Provenance to you?
Q15. And when purchasing Cabbage, how important is that it is grown in Australia?
Sample Wave 7, N=317, Wave 11 N=304 and Wave 27 N=301



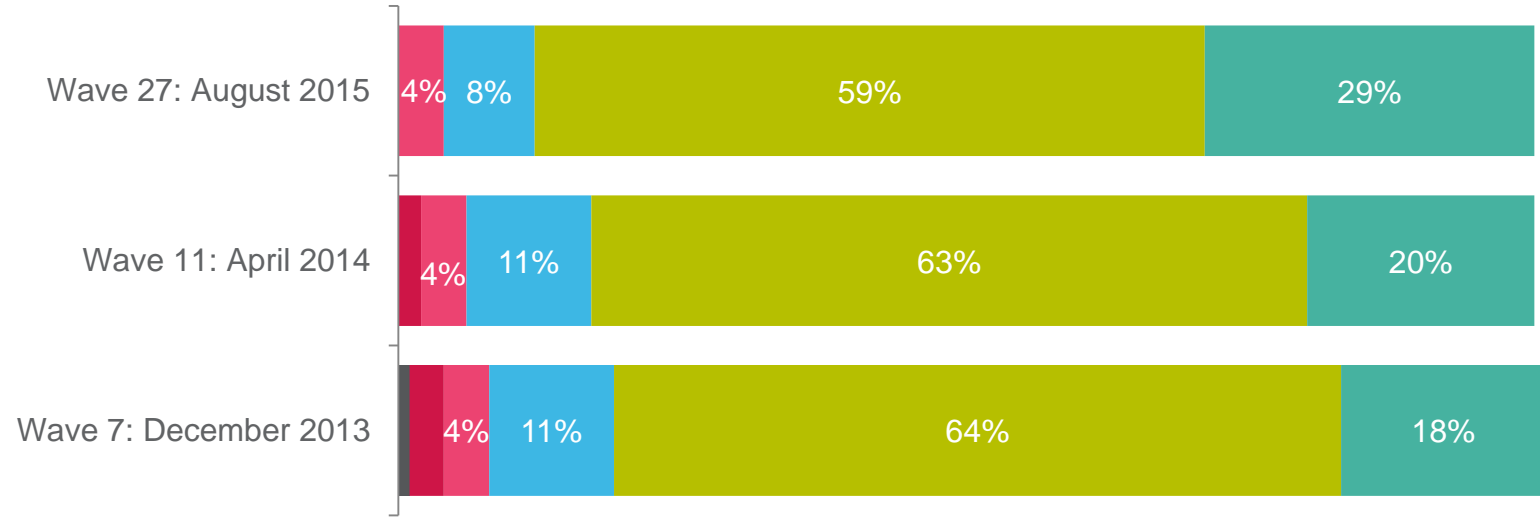
Cabbage is expected to remain fresh for over 10 days, consistent with previous months.

Consumer expectations of freshness is improving upon each wave and are typically being met.

Expected to stay fresh for 10.7 days

- ▼ 10.3 days, Wave 7
- ▲ 10.9 days, Wave 11

Expectations Met



■ Never met ■ Rarely met ■ Met some of the time ■ Met half of the time ■ Met most of the time ■ Always met

Q12. How long do you expect <commodity> to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy <commodity> ?
Sample Wave 7, N=317, Wave 11 N=304 and Wave 27 N=301



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

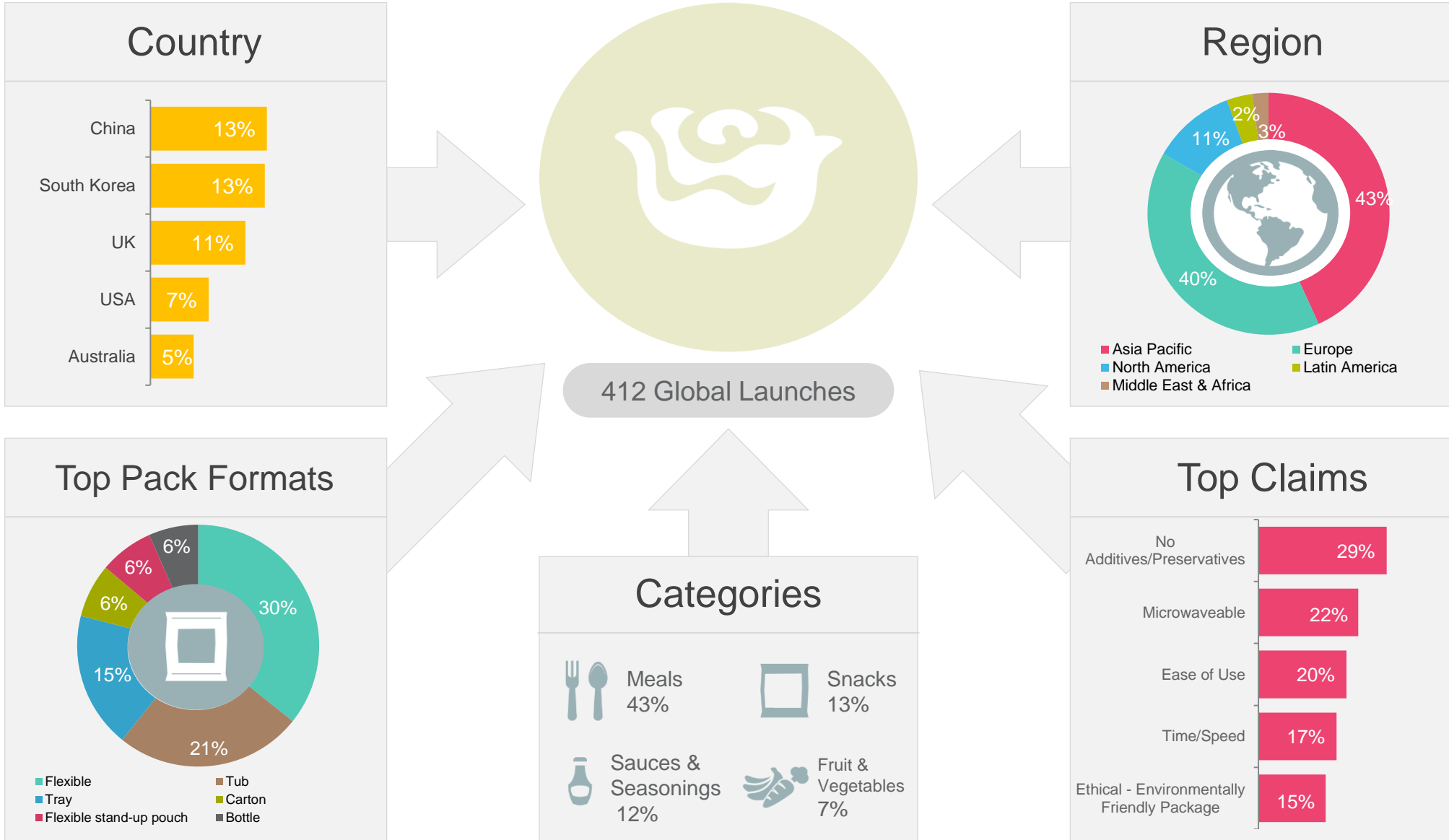


Trends: Cabbage

Cabbage Global NPDs

August – October 2015

There were 412 global launches of products containing Cabbage as an ingredient. The majority of launches occurred in Asia Pacific and Europe. No additives/preservatives and microwaveable claims were common with products launched. The most commonly launched product were meals and snacks, consistent with the previous wave.





Cabbage Product Launches: Last 3 Months (August – October 2015) Summary

- There were 412 products containing cabbage as an ingredient that were launched globally. This was slightly below the number of launches in previous waves.
- There were twenty Australian launches generally consisting of soups and stock.
- Asia Pacific (43%) and Europe (40%) were the dominant launch regions for cabbage products. Whilst China, South Korea and the UK were the main countries for launches.
- A large proportion of products launched were meals and meal centres (43%). Snacks (13%) and sauces and seasonings (12%) were also common categories for products.
- No additives/preservatives was the top claim utilised (29%). Convenience claims were also common, including microwaveable (22%), ease of use (20%), and time/speed (17%).
- The most innovative product launched was a Brunch Indian Curry Yogurt Spread in Austria, and a Pancake and Waffle Mix from USA (see following pages).



Source: Mintel (2015)

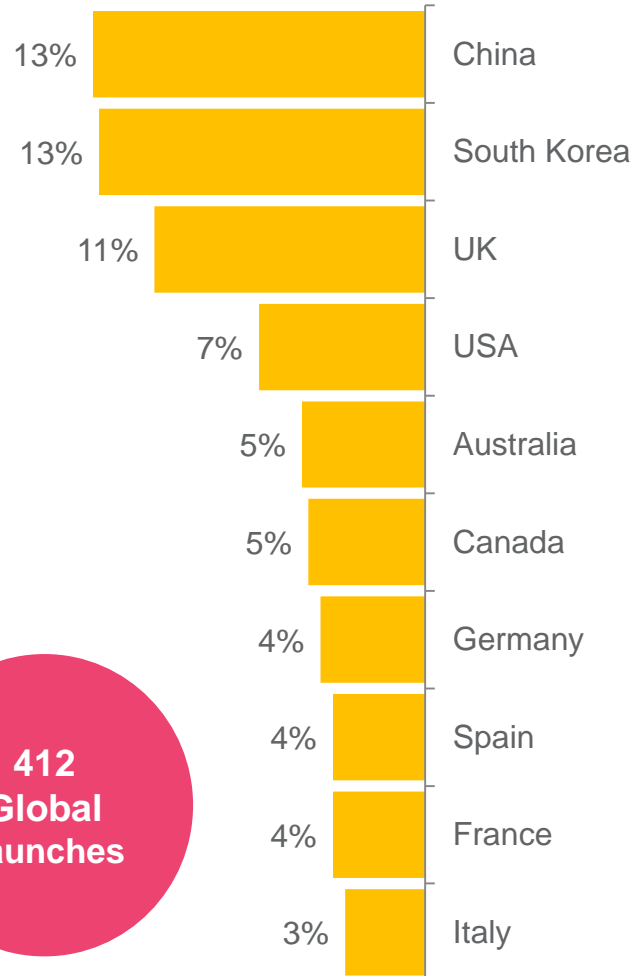


Cabbage Launches

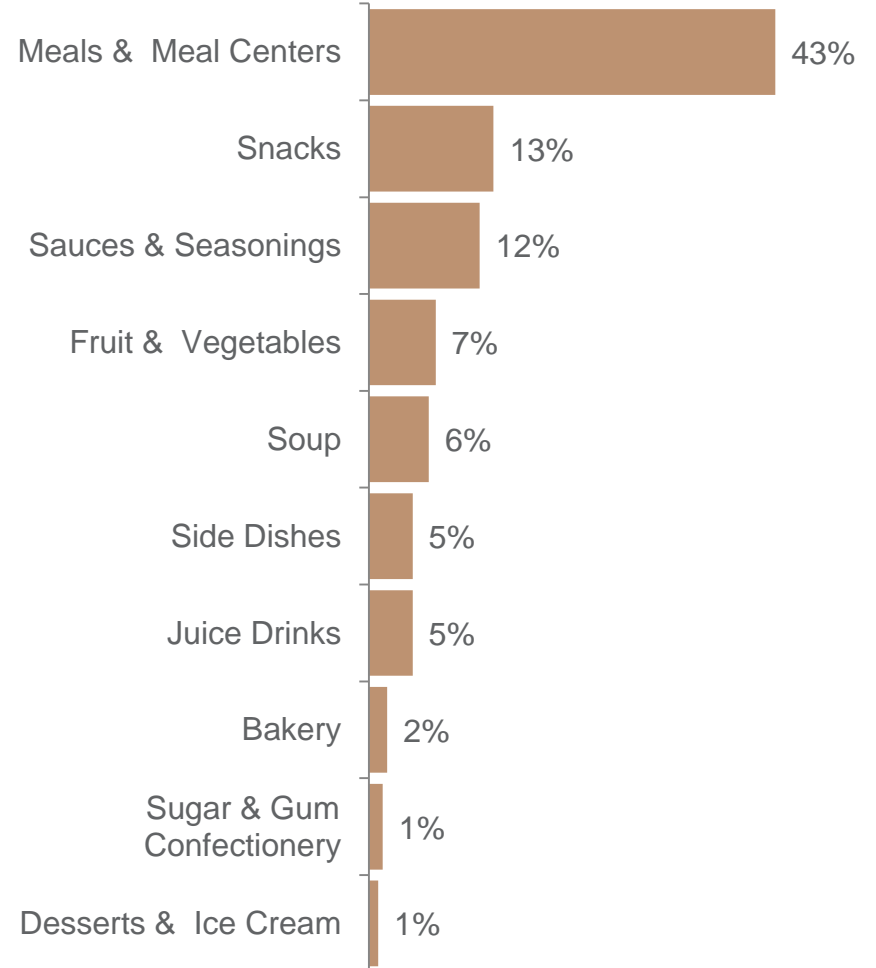
Country & Categories

- Meals and meal centers remained the top launch category for cabbage products.
- China, South Korea and UK were the main countries for products launched.

Top 10 Launch Countries



Top 10 Launch Categories












412
Global
Launches












No additives/preservatives is the most used claim for cabbage products. Flexible packaging is commonly utilised across regions, with tubs and trays also being popular options.

Pack Formats Used

Global		Flexible	30%
		Tub	21%
		Tray	13%
Asia Pacific		Flexible	36%
		Tub	22%
		Flexible Stand-Up Pouch	9%
Europe		Tray	27%
		Flexible	25%
		Tub	22%

Top Claims Used

Global		No Additives/Preservatives	29%
		Microwaveable	22%
		Ease of Use	19%
Asia Pacific		No Additives/Preservatives	33%
		Time/Speed	27%
		Ease of Use	22%
Europe		No Additives/Preservatives	24%
		Ethical - Environmentally Friendly Package	23%
		Microwaveable	21%

➤➤➤ Innovative Cabbage Launches: L3M (August – October 2015)

Co-Op Gold d'Or Chicken & Vegetable Wonton Soup (Canada)

Co-Op Gold Chicken & Vegetable Wonton Soup is now available. The microwavable, USDA inspected product, retails in a 305g pack.



Claims:
Microwaveable

Mein Menü Frischer Genuss Cashew Chicken Wok Kit (Germany)

Mein Menü Frischer Genuss Hähnchen Cashew Wok (Cashew Chicken Wok Kit) is now available. The product cooks in eight minutes and retails in an FSC-certified 700g pack containing yellow rice, marinated chicken breast fillet, vegetables, a 100g sachet of oyster sauce and 20g cashew nuts in separate compartments.



Claims:
Ethical - Environmentally Friendly Package

Yamazaki Lunch Pack Karuizawa Cabbage Burger Sandwich (Japan)

Yamazaki Lunch Pack Karuizawa Cabbage Burger Sandwich has been relaunched. The product is made with cabbage from Karuizawa and mustard. It retails in a pack containing two units bearing a Facebook link. Launched on August 1, 2015. RRP not available.



Claims:
Social Media

Sensations by Compliments Vegetable Pot Stickers (Canada)

Sensations by Compliments Vegetable Pot Stickers are described as having classic Asian flavours wrapped around a tasty blend of tofu, vegetables and noodles. For a quick and easy meal solution, it can be enjoyed boiled in broth with added vegetables. This fully cooked product contains no artificial colours or flavours, and retails in a resealable 739g pack.



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

➤➤➤ Innovative Cabbage Launches: L3M (August – October 2015)

ICA Cool Caesar Salad (Sweden)

ICA Cool Caesar (Cool Caesar Salad) is a luxury salad that satisfies hunger. This ready to serve salad dish contains red lettuce, leek, red cabbage, baby spinach, pea shoots, cheese flakes and croutons topped with a Caesar dressing and pumpkin seeds for extra taste and crunch. This product claims to be ideal for a quick and light lunch on the go, and retails in a 160g pack with a fork.



Claims:
Ease of Use, On-the-Go, Time/Speed

Peacock Food Collection Dumpling Hot Pot (South Korea)

Peacock Food Collection Dumpling Hot Pot is claimed to provide chewy meat dumpling in spicy stew without any preparation. It consists of flat dumpling filled with meat, spicy meat broth, chopped noodle, napa cabbage, onion, zucchini, king oyster mushroom, leek, carrot, red chilli and cheongyang chilli. It can be conveniently cooked as it is in the aluminum package without a saucepan, and can be prepared in 20 minutes by simply adding 850ml water in it. The product retails in a 780g pack which is sufficient for three or four servings.



Claims:
Ease of Use

Morinaga Hi-Chew Acerola Soft Chew (Japan)

Morinaga Hi-Chew Acerola Soft Chew is a new limited edition variety for the 40th anniversary of the brand. The product retails in a 12 x 4.6g pack. Launched on August 4, 2015 with an RRP of 108 yen.



Claims:
Limited Edition

Brunch Indian Curry Yogurt Spread (Austria)

Brunch Indian Curry (Indian Curry Yogurt Spread) has been repackaged. This product is made with yogurt, vegetable fat and oil and now retails in a newly designed 200g pack.



Claims:
N/A

»»» Innovative Cabbage Launches: L3M (August – October 2015)

Go Raw Rowdy Ranch Salad Snax (USA)

Go Raw Rowdy Ranch Salad Snax have been repackaged in a newly designed 1-oz. pack. The USDA organic certified product is low in fat, suitable for vegans, contains no junk, cholesterol, GMO, nut or gluten, and described as a hassle free way to enjoy salads on-the-go with organic kale, red cabbage, spinach and carrots which are tossed with rowdy ranch dressing.



Claims:
No Additives/Preservatives,
Low/No/Reduced Allergen, Low/No/Reduced Cholesterol, GMO-Free, Organic, Vegan, Low/No/Reduced Fat, On-the-Go, Ease of Use, Gluten-Free, No Animal Ingredients

Bicky BBQ Sauce Pack (Belgium)

Bicky BBQ Sauce Pack contains a 250ml dressing, a 250ml tomato sauce and a 250ml hot sauce, all with Facebook links. The product includes a free 100g crisps pack.



Claims:
Social Media

Urban Remedy No. 10 Fountain of Youth Juice (Brazil)

Urban Remedy Fonte da Juventude Nº10 (No. 10 Fountain of Youth Juice) is 100% natural, organic, cold pressed and contains blueberries, açai, raspberry, pineapple, cabbage and chia seed. It is said that red and blue fruits are rich in antioxidants and are low GI. The product retails in a 500ml pack.



Claims:
Organic, All Natural Product, Antioxidant, Other (Functional), Low/No/Reduced Glycemic

My Favorite...Pancake & Waffle Mix Birthday Cake Pancake & Waffle Mix (USA)

My Favorite...Pancake & Waffle Mix Birthday Cake Pancake & Waffle Mix is said to be bursting with the taste of cake batter sprinkled with candy confetti throughout. Warm maple syrup is recommended as the "icing on the cake". The kosher certified product retails in a 24-oz. pack.



Claims:
Kosher



Australian Cabbage Launches: L3M (August – October 2015)

Woolworths Cooking With Kylie Kwong Vegetable Fried Rice

Woolworths Cooking With Kylie Kwong Vegetable Fried Rice is now available. Made with Australian free-range eggs, this product carries an Australian Health Star Rating of 3.5 stars and contains no artificial colours or flavours. It is microwavable and retails in a 300g pack.



Claims:
No Additives/Preservatives, Ethical - Animal, Microwaveable

Woolworths Created with Jamie Five-Spice Chicken Noodles Meal Kit

Woolworths Created with Jamie Five-Spice Chicken Noodles Meal Kit is made with RSPCA approved 100% Aussie chicken and fresh Asian style veggies. This Australian made product is designed to be cooked in just 15 minutes following five simple steps. It contains no artificial colours or flavours, and retails in a 750g recyclable pack.



Claims:
No Additives/Preservatives, Hormone Free, Ethical - Environmentally Friendly Package, Ethical - Animal, Ease of Use, Time/Speed

Rafferty's Garden Beef with Veggies & Basmati Rice Mashed Baby Food

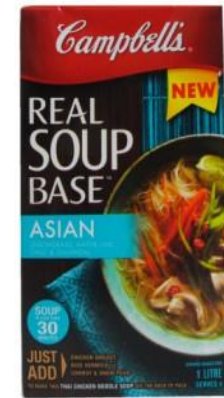
Rafferty's Garden Beef with Veggies & Basmati Rice Mashed Baby Food is specially designed for babies over eight months old. This yummy, premium, mashed baby food provides a natural source of protein and is free from added sugar, artificial colourings, artificial flavourings, preservatives, gluten and GM ingredients. The product can be microwaved and retails in a 150g pack.



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

Campbell's Real Soup Base Asian Soup Base

Campbell's Real Soup Base Asian Soup Base comprises lemongrass, kaffir lime, chilli and galangal. This product is 100% natural, 99% fat free and contains no added MSG or preservatives, is made from scratch using stock chicken with fish sauce, lemongrass, kaffir lime, coriander, chilli, galangal and garlic, and can be used to make soup in less than 30 minutes. The product just requires the addition of chicken breast, rice vermicelli, carrot and snow peas to prepare, and retails in a 1L pack with on-pack recipe suggestions.



Claims:
Ease of Use, No Additives/Preservatives, All Natural Product, Low/No/Reduced Fat, Time/Speed



Celery.





Celery is purchased around 3 times and consumed on average 9 times per month, both slightly increasing upon the previous wave.

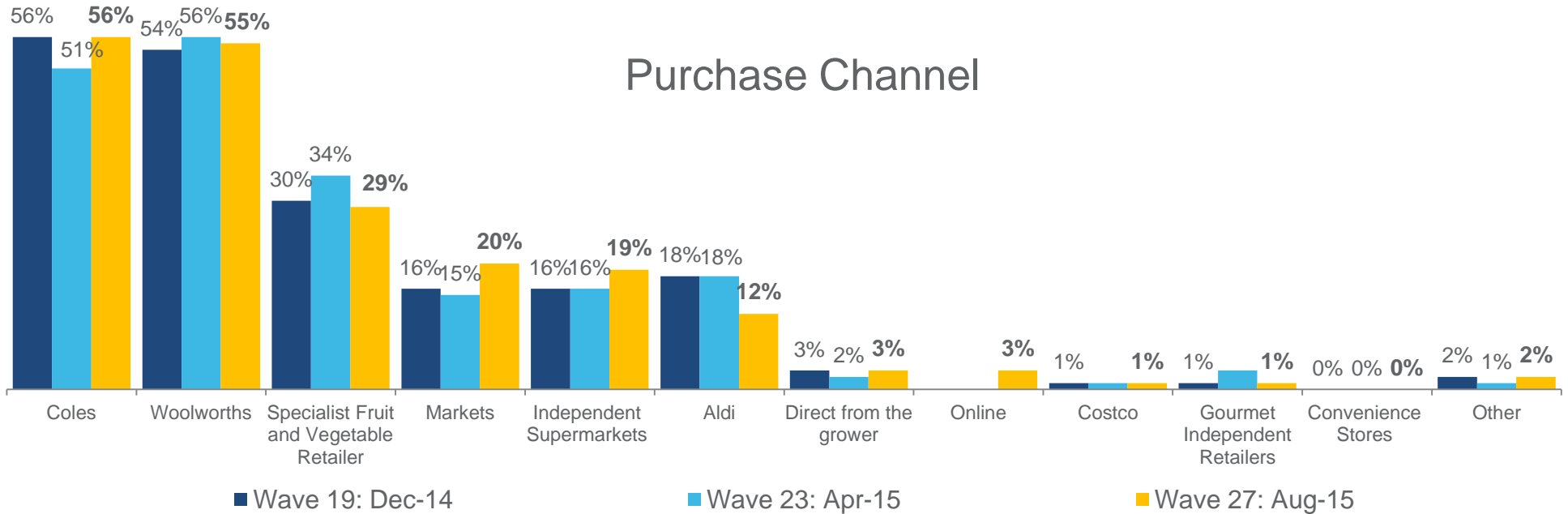
Mainstream retailers remain the main purchase channel used, with Aldi seeing a decrease this wave.



▼ 3.0 times, Wave 19
 ▼ 2.9 times, Wave 23



▲ 9.7 times, Wave 19
 ▼ 9.0 times, Wave 23



Q1. On average, how often do you purchase <commodity>?
 Q2. On average, how often do you consume <commodity>?
 Q5. From which of the following channels do you typically purchase <commodity>?
 Sample Wave 19 N=358, Wave 23 N=310 and Wave 27 N=301



Average Spend and Price Sensitivity



Average weight of purchase

The average consumer typically purchased **800g** of Celery in August 2015, which is consistent with previous waves.

- 800g, Wave 19
- 800g, Wave 23



Recalled last spend

The average recalled last spend on Celery was **\$2.80**, experiencing a small increase since the previous wave.

- ▼ \$2.70, Wave 19
- ▼ \$2.60, Wave 23



Value for money

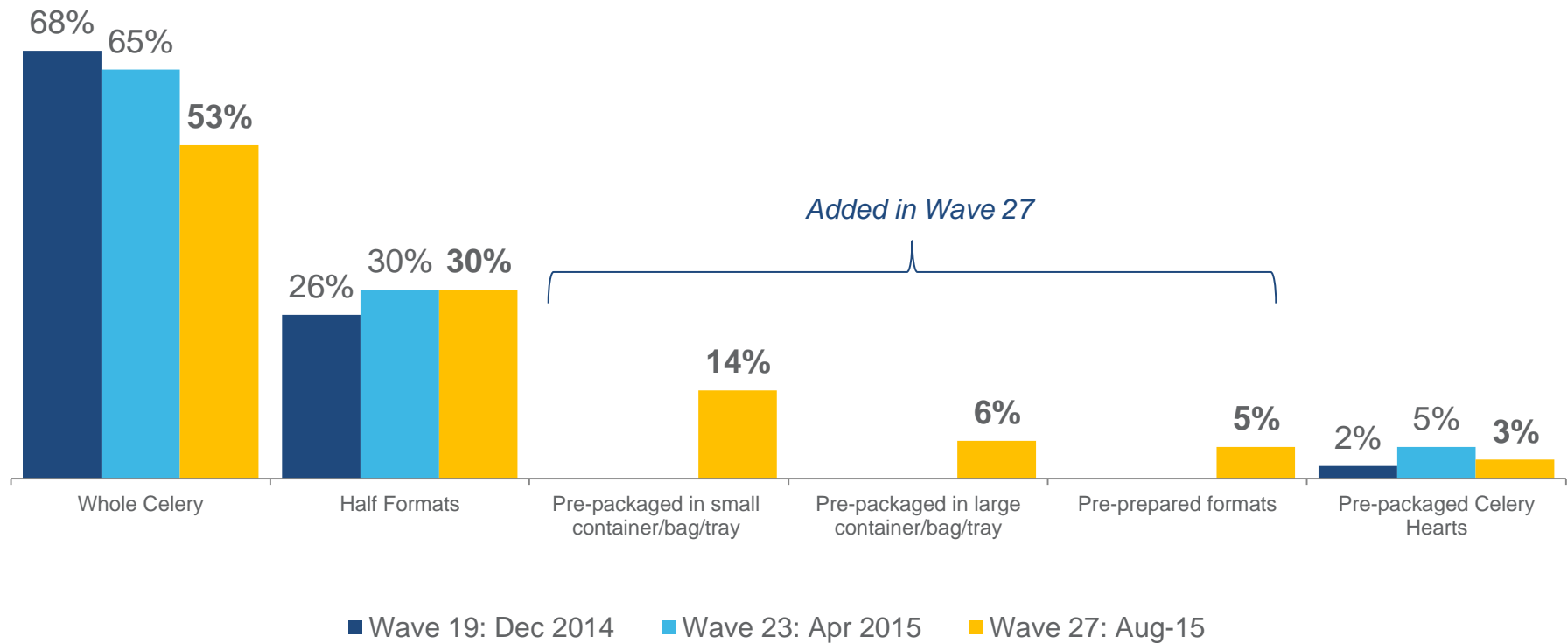
On average, consumers perceive Celery to be good value for money (**6.4/10**), which decreased from the previous wave, but still higher than in Wave 19.

- ▼ 6.3/10, Wave 19
- ▲ 6.5/10, Wave 23

Q3. How much <commodity> do you typically purchase when you shop for it?
 Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
 Q4. Please indicate how Poor to Good Value you think this product is? 0-10 scale
 Sample Wave 19 N=358, Wave 23 N=310 and Wave 27 N=301

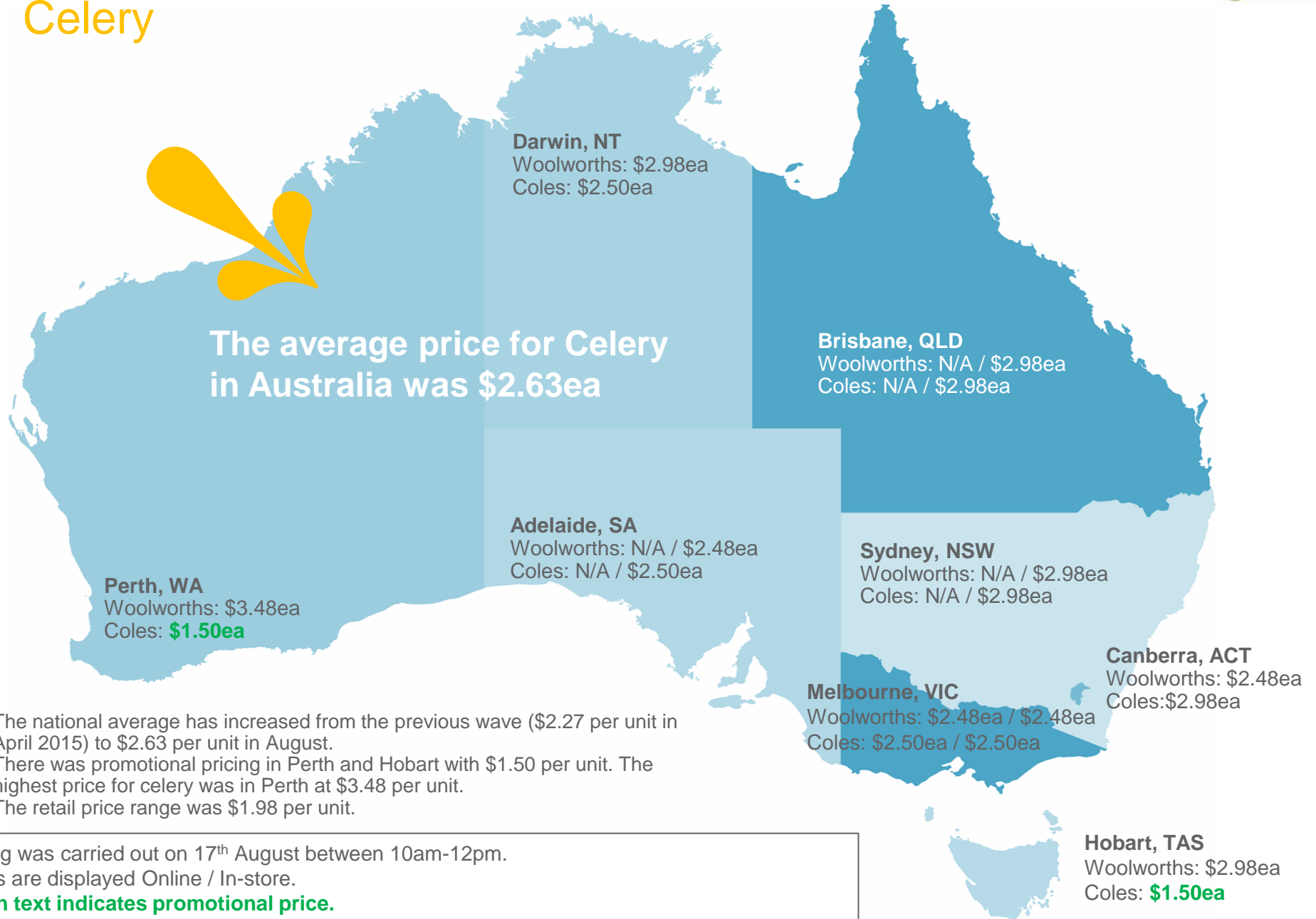


There has been a downwards trend towards the purchase of whole celery. Half formats of celery remain consistent with the previous wave.



Online and In-store Commodity Prices

Celery



- The national average has increased from the previous wave (\$2.27 per unit in April 2015) to \$2.63 per unit in August.
- There was promotional pricing in Perth and Hobart with \$1.50 per unit. The highest price for celery was in Perth at \$3.48 per unit.
- The retail price range was \$1.98 per unit.

Pricing was carried out on 17th August between 10am-12pm.
Prices are displayed Online / In-store.

Green text indicates promotional price.

Spontaneous awareness of celery varieties remains very low, with 82% of consumers unable to recall a type.

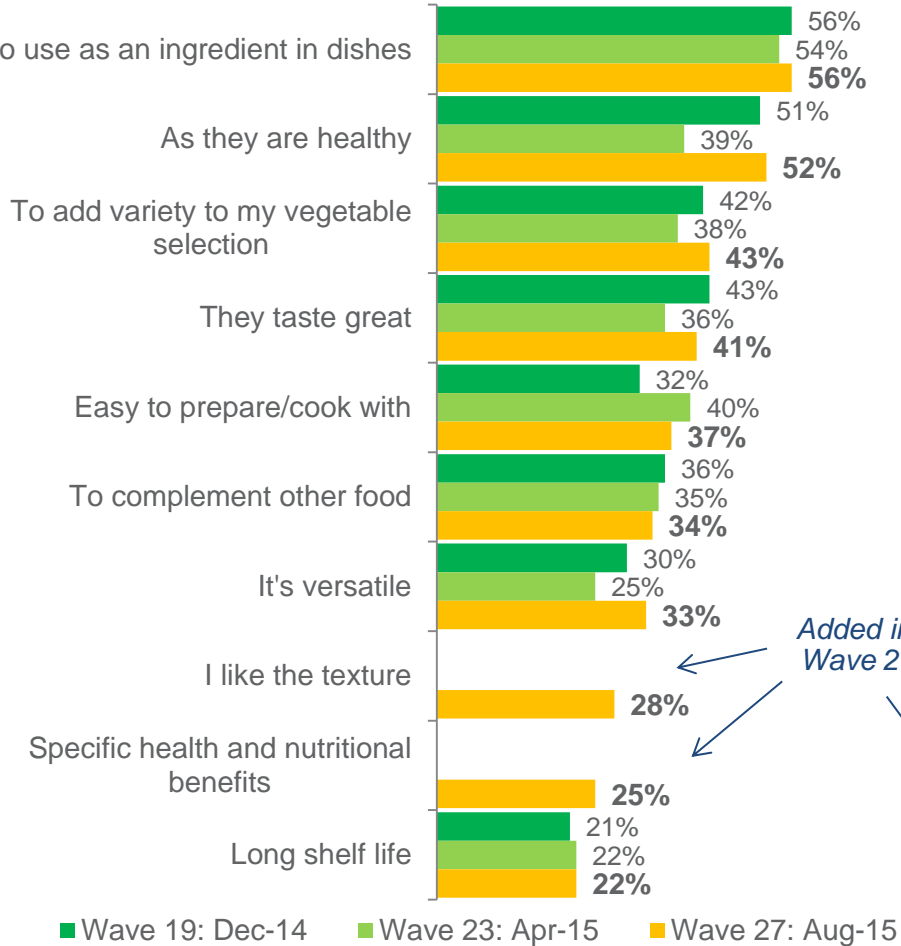
- ▶ Consumers who stated a type of celery recall the 'normal' one and 'green' types.
- ▶ Many also confused celery with celeriac.



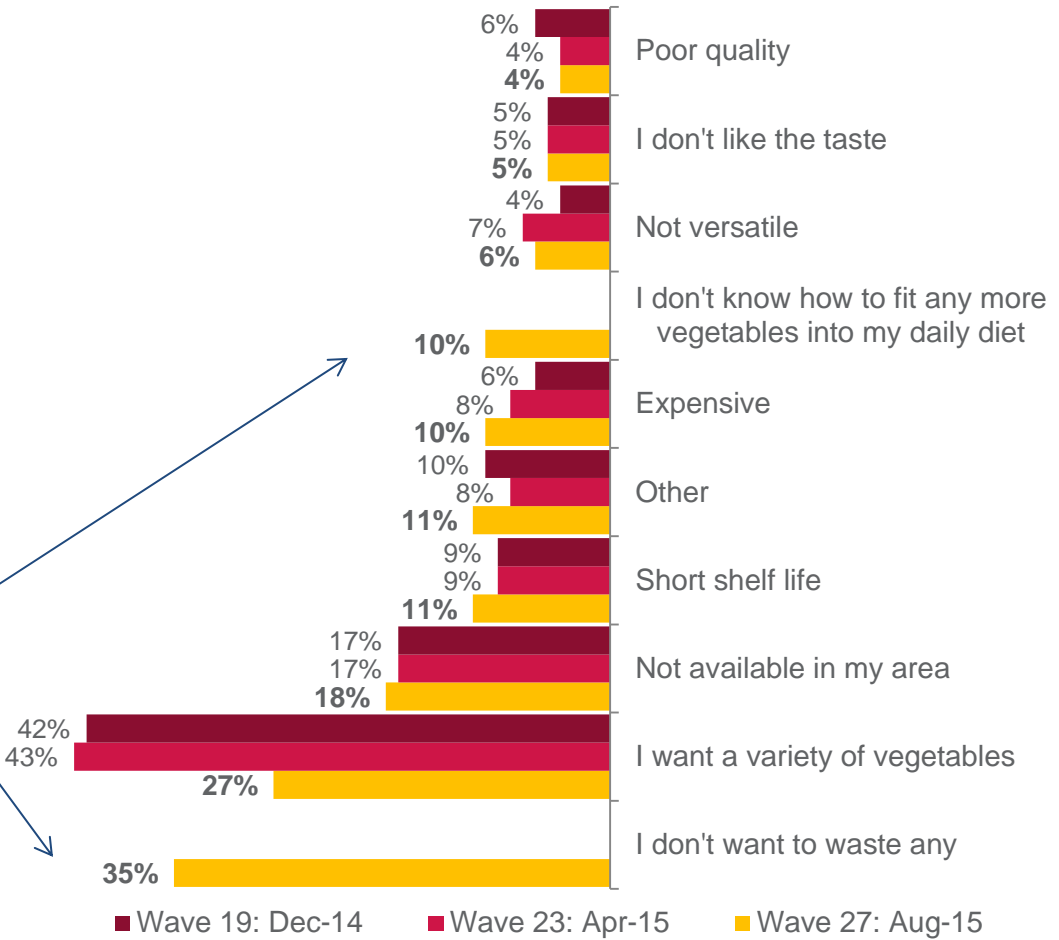


There is an overall increase in triggers to purchase this month. Use as an ingredient in dishes is the key influence on purchase. The main barriers to purchase are that people don't want to waste any and want a variety of vegetables in their diet.

Triggers



Barriers



Added in Wave 27

Q7. Which of the following reasons best describes why you purchase <commodity> ?
Q8. Which reason best describes why you don't buy <commodity> more often?
Sample Wave 19 N=358, Wave 23 N=310 and Wave 27 N=301



Typical cuisines cooked are consistent with previous waves. Australian cuisine remains the most popular choice for cooking celery. Snacks and Chinese cuisine are also frequently cooked/prepared.

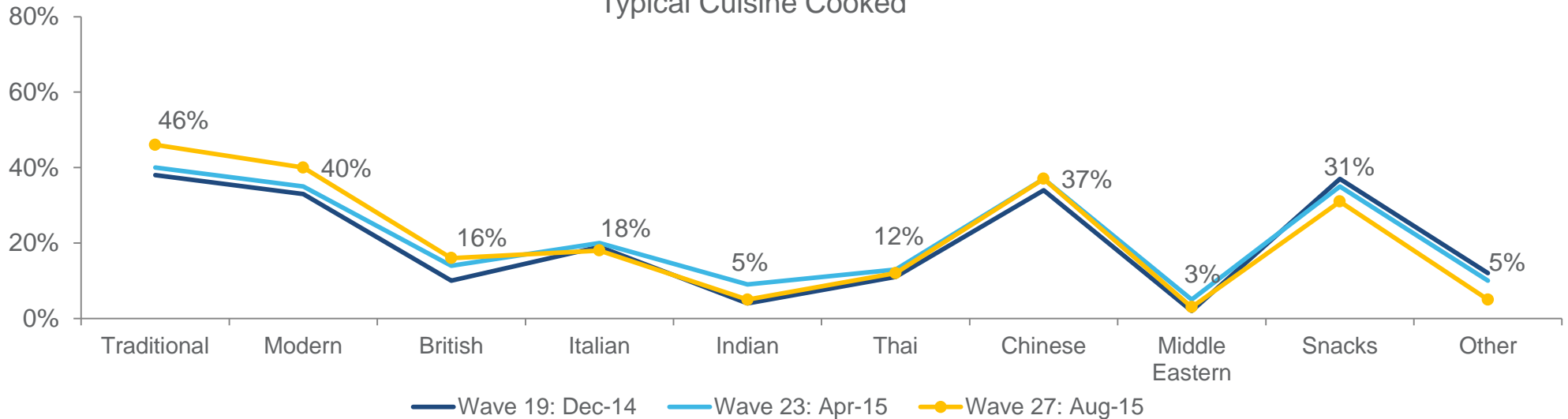
Dinners and family meals are the main celery consumption occasions.

Top 5 Consumption Occasions



Dinner	57%
Family Meals	49%
Weekday Meals	38%
Lunch	37%
Quick Meals	36%

Typical Cuisine Cooked



← Australian → ← European → ← Asian → ← Other Cuisines →



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

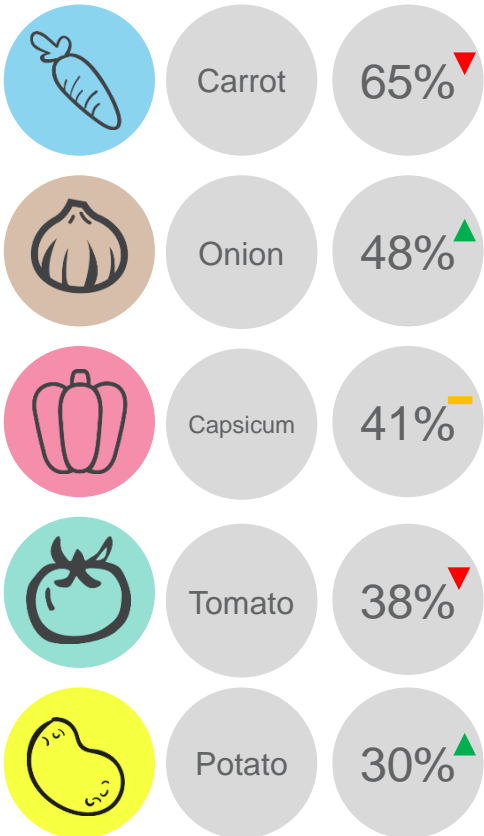
Q10. What cuisines do you cook/consume that use <commodity> ?
Q11. Which of the following occasions do you typically consume/use <commodity> ?
Sample Wave 19 N=358, Wave 23 N=310 and Wave 27 N=301



Celery is generally served with carrots, onions and capsicums. Tomatoes continue to decline, whilst potatoes have steadily increased across waves as an accompanying vegetable. Cooking styles have experienced strong seasonal influences with two thirds of consumers eating celery raw, while stir frying and soups continue to rise.



Accompanying Vegetables



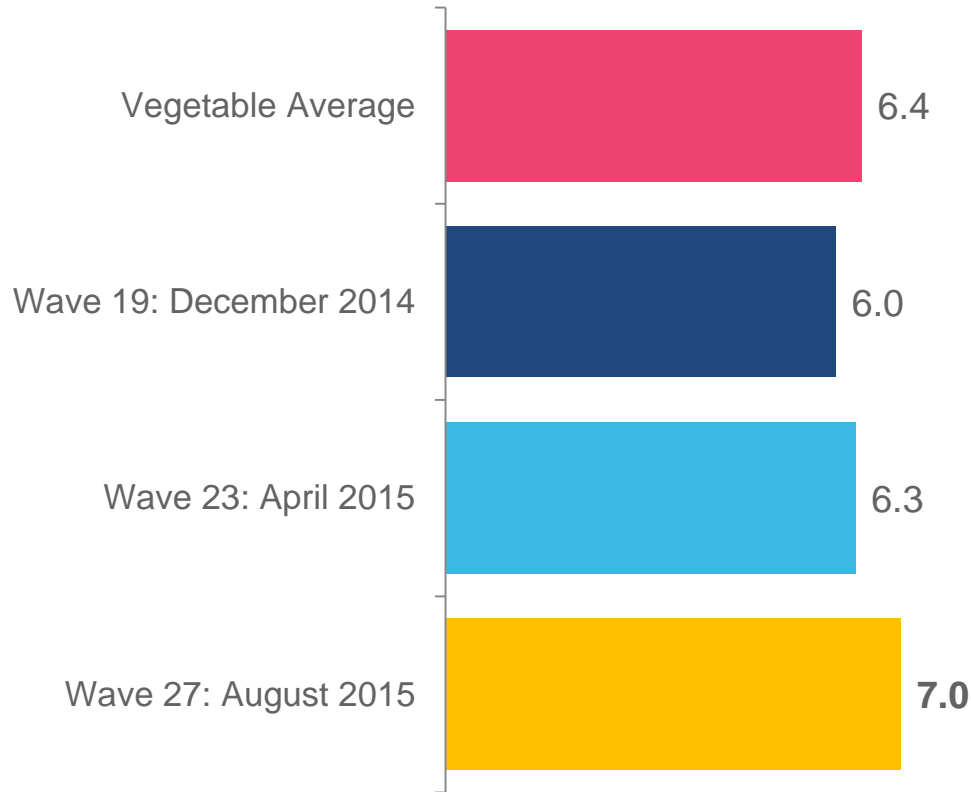
Top Cooking Styles

	Wave 19	Wave 23	Wave 27
Raw	68%	62%	62%
Stir frying	47%	49%	53%
Soup	35%	46%	53%
Stewing	25%	31%	26%
Sautéing	11%	14%	14%
Deep Frying	1%	1%	9%
Boiling	6%	7%	9%
Steaming	6%	8%	8%
Other	7%	6%	5%
Roasting	2%	3%	4%

Q9. How do you typically cook <commodity> ?
 Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
 Sample Wave 19 N=358, Wave 23 N=310 and Wave 27 N=301



Importance of provenance has trended upwards and now above the Vegetable Average. Knowing that celery are grown in Australia is the most important provenance information for consumers.



Q14. When purchasing <commodity>, how important is Provenance to you?
Q15. And when purchasing Celery, how important is that it is grown in Australia?
Sample Wave 19 N=358, Wave 23 N=310 and Wave 27 N=301



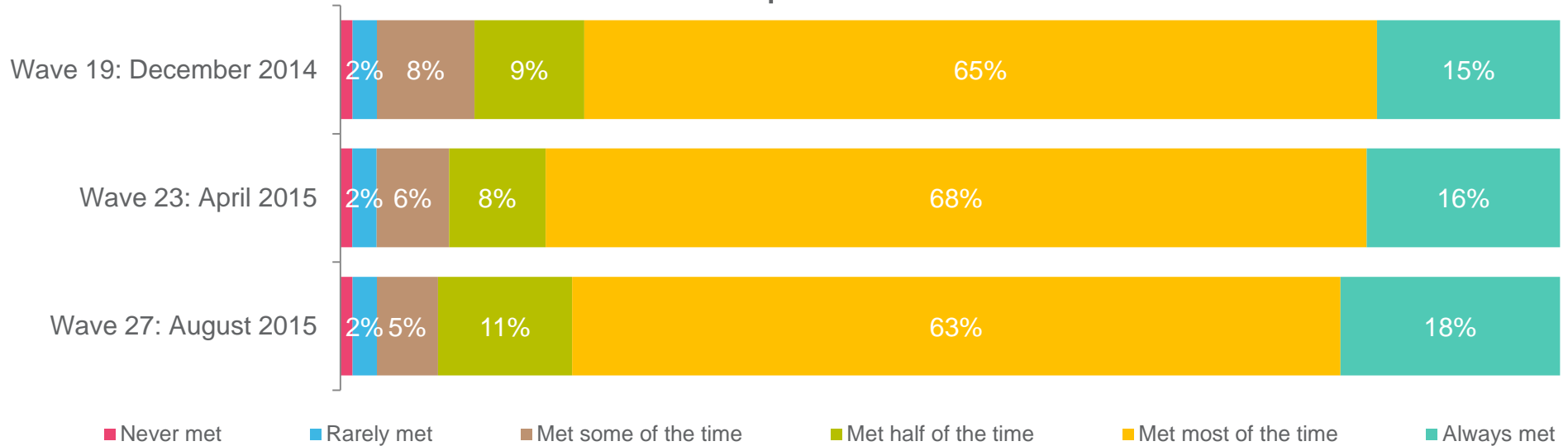
Consumers expect celery to remain fresh for well over a week once purchased, which is slightly above the previous two waves.

Expectations of freshness are generally met most of the time, consistent with previous waves.

Expected to stay fresh for **10.2 days**

- ▼ 9.5 days, Wave 19
- ▼ 9.9 days, Wave 23

Expectations Met



Q12. How long do you expect <commodity> to stay fresh for, once you have purchased it?
 Q13. How often is this length of freshness met when you buy <commodity> ?
 Sample Wave 19 N=358, Wave 23 N=310 and Wave 27 N=301



Trends: Celery



Celery Global NPDs

August – October 2015

There were 1149 products containing celery launches in the past three months. Launches primarily occurred in Europe USA and Germany were the most popular launch countries. Categories for launch were sauces, meals and processed products.





Celery Product Launches: Last 3 Months (August – October 2015) Summary

- Consistent with previous trends, a large number of products (N=1149) containing celery as an ingredient were launched globally in the last three months.
- There were 41 products launched in Australia, which was higher than in previous waves. Products ranged from stock, soup and sauces.
- The majority of launches occurred in Europe (59%). Key countries for launch were USA and Germany.
- Flexible packaging (18%) and trays (16%) were the main packaging types used for products.
- Sauces and seasoning (23%), meals (19%) and processed products (19%) were the main categories for launches, relatively with previous trends.
- Core claims used were no additives or preservatives (32%) and microwavable (26%).
- The most innovative product launch this wave was a 2 in 1 Ketchup & Mayonnaise in the Netherlands. Examples other innovative launches can be found on the following pages.



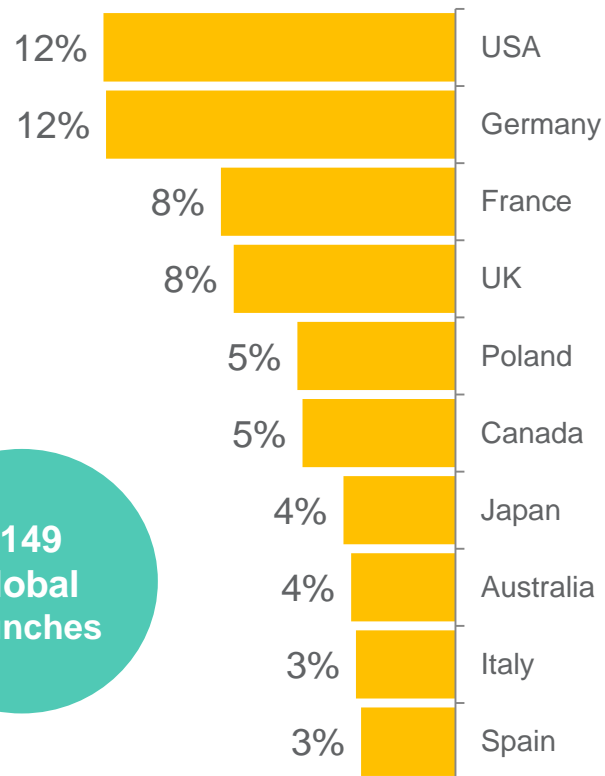
Source: Mintel (2015)



Celery Launches

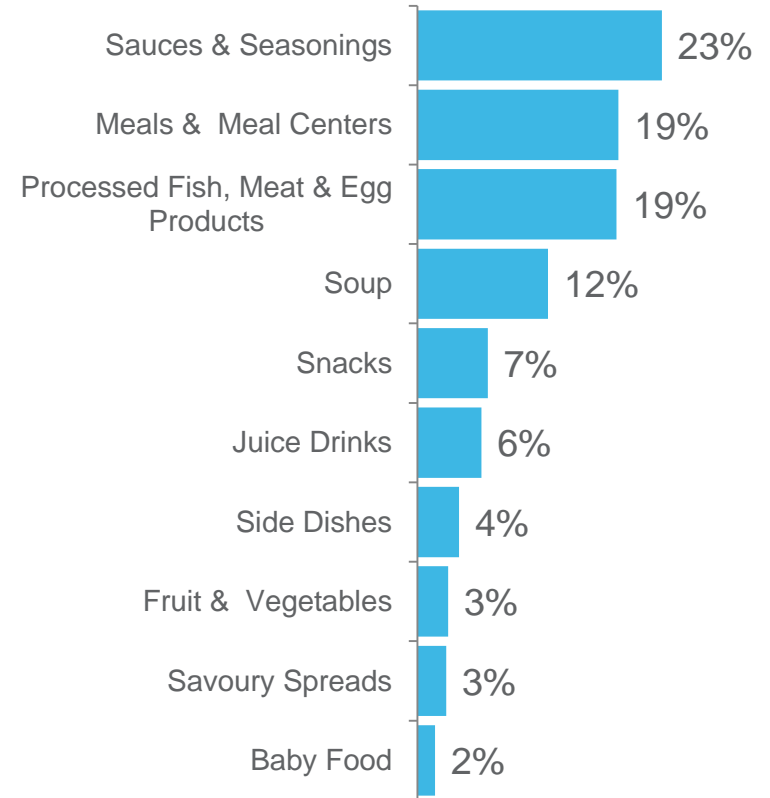
- ➔ USA and Germany continue to produce the greatest number of products containing celery.
- ➔ Sauces, meals, processed products and soup are the main categories for products launched.

Top Launch Countries



1149
Global
Launches









Top Launch Categories














No additives/preservatives and microwaveable are the most used claim on celery products. Flexible packaging is utilised across regions, however trays appear the most popular format in Europe.

Pack Formats Used

Global		Flexible	18%
		Tray	16%
		Tub	11%
Europe		Tray	19%
		Flexible	18%
		Tub	13%
North America		Flexible	18%
		Skinpack	17%
		Bottle	15%

Top Claims Used

Global		No Additives/Preservatives	32%
		Microwaveable	26%
		Ethical - Environmentally Friendly Package	18%
Europe		No Additives/Preservatives	27%
		Microwaveable	24%
		Ethical - Environmentally Friendly Package	16%
North America		No Additives/Preservatives	41%
		Low/No/Reduced Allergen	40%
		Gluten-Free	38%



Innovative Celery Launches: L3M (August – October 2015)

Mug Shot Tangtastic Sweet & Sour Noodles (UK)

Mug Shot Tangtastic Sweet & Sour Noodles have been repackaged. This product comprises oodles of ribbon noodles in a sweet and sour sauce with red and green peppers, carrot and chilli, and is described as tasty and guilt free. The noodles can be prepared in five minutes by adding boiled water to provide a naughty but nice taste of the orient. They are free from artificial colours and preservatives, have less than 1% fat, and are suitable for vegetarians. The product now retails in a newly designed 67g pack bearing a Facebook link.



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

McEnnedy American Way Chicken Fajita Wraps (Croatia)

McEnnedy American Way Tortilje s Piletinom (Chicken Fajita Wraps) are described as wheat tortillas filled with cooked sliced chicken fillets and colourful vegetables in cheese and tomato sauce. This frozen and microwaveable product retails in a 300g pack containing two 150g individually wrapped units.



Claims:
Microwaveable

Frill Refreshing Green Frozen Smoothie (UK)

Frill Refreshing Green Frozen Smoothie is said to contain more fibre and less sugar than ice cream. This product retails in a 475ml tub.



Claims:
High/Added Fiber, Low/No/Reduced Sugar

Williams-Sonoma Anchor Porter Braising Sauce (USA)

Williams-Sonoma Anchor Porter Braising Sauce is described as a rich, mildly spicy braising sauce made with San Francisco's craft-brewed porter, said to be ideal for beef, pork or chicken. It retails in a 24.5-oz. jar featuring a recipe suggestion.



Claims:
Cobranded, Ease of Use, Time/Speed



Innovative Celery Launches: L3M (August – October 2015)

Pesto Princess Foods Pea & Pesto Soup (South Africa)

Pesto Princess Foods Pea & Pesto Soup is said to provide nourish, comfort and delight and is made using basil pesto. This microwaveable hand-made product is halal certified and retails in a 600g pack.



Claims:
Halal, Microwaveable

Delli Green Juice (Mexico)

Delli Bebida Tipo Jugo Verde (Green Juice) comprises orange, pineapple, cactus, celery and parsley juices, is free of added sugar, high in vitamin C, antioxidant, and said to be delicious. The premium quality product retails in a 3.785L pack.



Claims:
Antioxidant, Premium, Low/No/Reduced Sugar

Glico Pretz Tomato Flavour Pretzel Stick (Japan)

Glico Pretz Tomato Flavour Pretzel Stick has been repackaged in limited edition Yokai Watch! design. It retails in a 134g pack. Launched on July 7, 2015 open-priced.



Claims:
Limited Edition

Nabisco Ritz Cream Cheese Cracker Sandwiches (USA)

Nabisco Ritz Cream Cheese Cracker Sandwiches come with a filling made with real cheese. The kosher certified product retails in a 10.8-oz. recyclable pack containing eight 1.35-oz. packs.



Claims:
Ethical - Environmentally Friendly Package, Kosher



Innovative Celery Launches: L3M (August – October 2015)

Swanson 100% Natural Chicken Broth (USA)

Chicken Stock, less than 2% of (Salt, Chicken Broth, Natural Flavouring Substance, Onion, Yeast Extracts, Chicken Fat, Carrot, Celery, Onion)



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

BluePrint Kale Apple Ginger Romaine Spinach Cucumber Celery Parsley Lemon Juice (USA)

BluePrint Kale Apple Ginger Romaine Spinach Cucumber Celery Parsley Lemon Juice has been repackaged with a new design. It comprises 100% raw and organic cold-pressed juice and is free of GMO and gluten. The product is kosher and USDA organic certified and retails in a 32-fl. oz. pack.



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

Hoti Kara Spaghetti Seasoning (Iran)

Hati Kara Spaghetti Seasoning is 100% natural with no added MSG. The product retails in a 500g pack.



Claims:
No Additives/Preservatives, All Natural Product

All American 2 in 1 Ketchup & Mayonnaise (Netherlands)

All American 2 in 1 Ketchup & Mayonnaise is now available. The product comprises a spicy sauce for refining and garnishing, which is ideal to consume with chips, hot dogs, fish, burgers, sandwiches and meatballs. It retails in a 190g pack.



Claims:
N/A



Australian Celery Launches: L3M (August – October 2015)

**Maggi Fusion Special Edition Ow Ow..
Spicy Cow Noodles**



**Impressed The Works Cold Pressed
Juice**



Celebrate Health Potato & Kale Soup



**Simmons Logue Fine Food Chunky
Beef Pie**

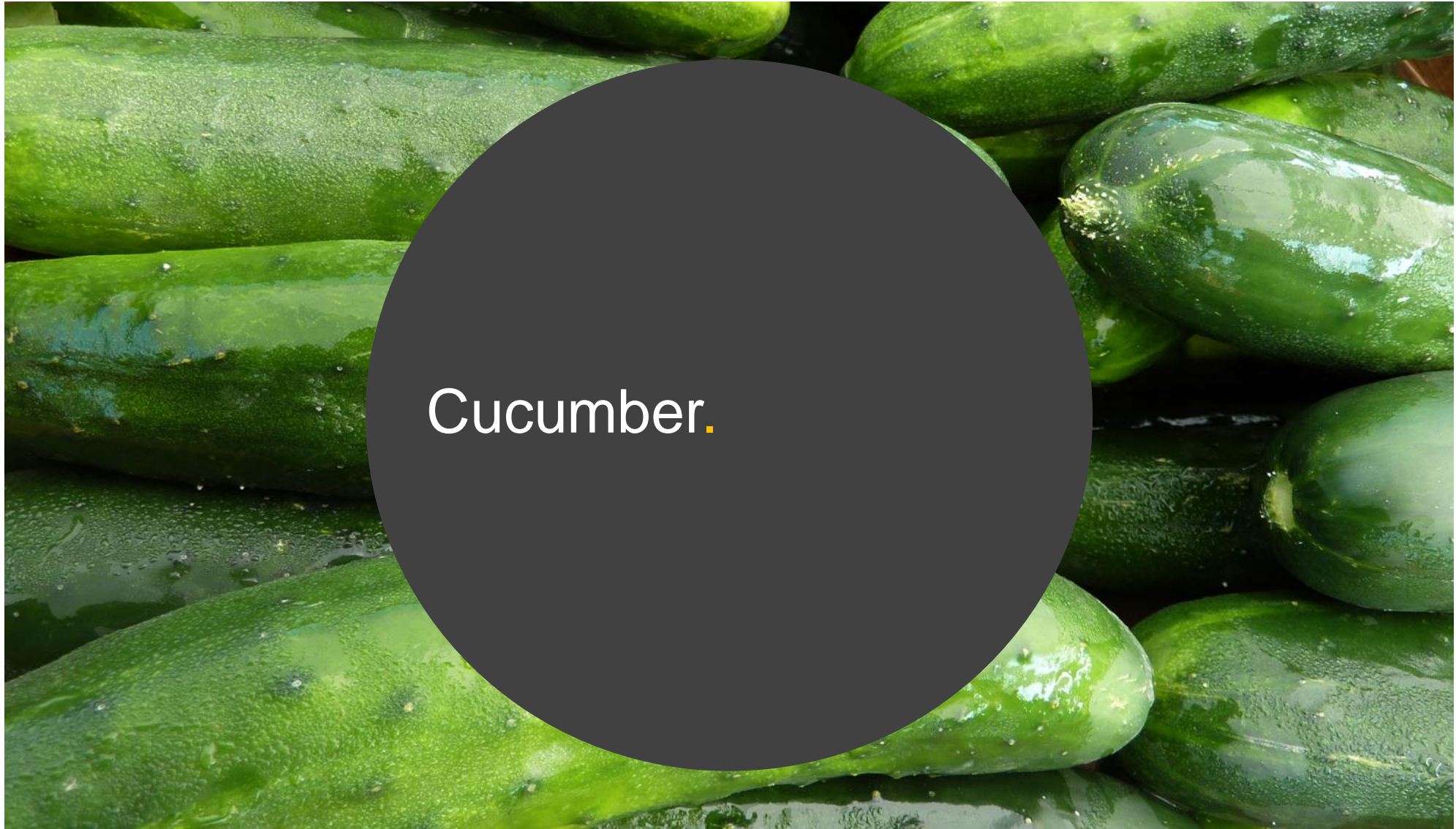


**Taylor's Spicy Vegetable & Red Lentil
Soup**



**Herbert Adams Gourmet Slow-Cooked
8 Hours Lamb & Rosemary Pies**





Cucumber.



Cucumbers are purchased on average 4 times per month and consumed around 12 times. The decline in consumption is likely due to seasonal patterns. Purchase is continually increasing at Woolworths and is the main purchase channel used.

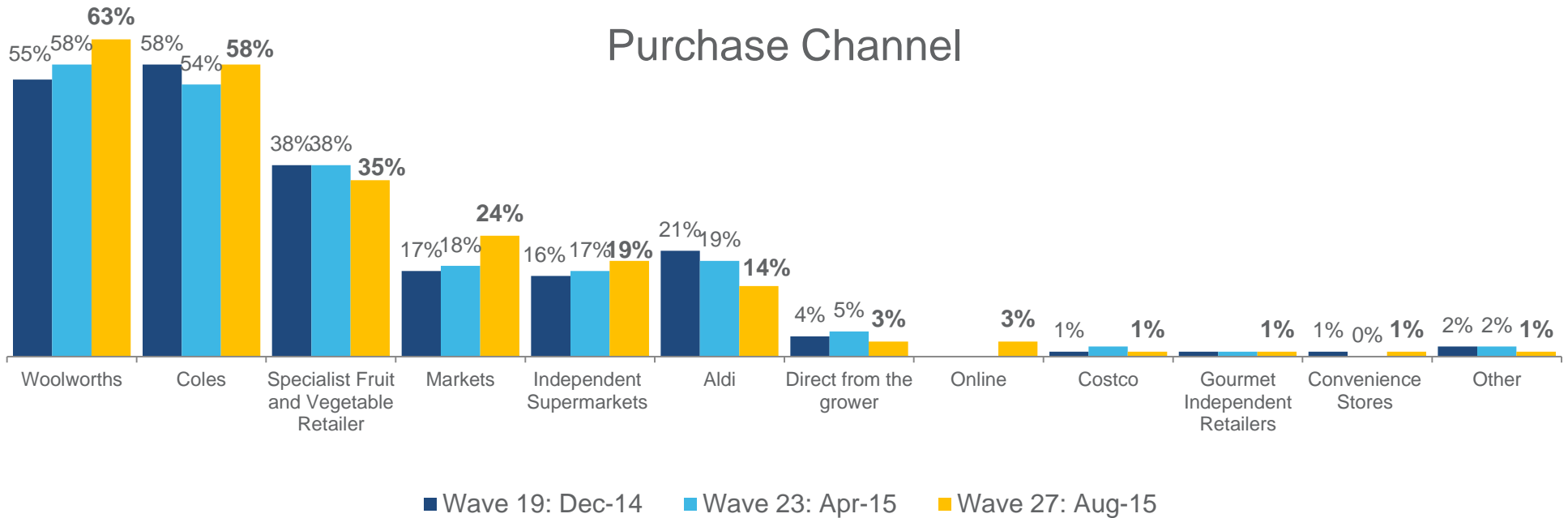


▲ 4.8 times, Wave 19
▼ 4.3 times, Wave 23



▲ 13.1 times, Wave 19
▲ 12.7 times, Wave 23

Purchase Channel



Q1. On average, how often do you purchase <commodity> ?
 Q2. On average, how often do you consume <commodity> ?
 Q5. From which of the following channels do you typically purchase <commodity> ?
 Sample Wave 19 N=359, Wave 23 N=308 and Wave 27 N=306



Average Spend and Price Sensitivity



Average weight of purchase

The average consumer typically purchase **800g** of Cucumber in August 2015, which is greater than past months.

- ▼ 600g, Wave 19
- ▼ 700g, Wave 23



Recalled last spend

The average recalled last spend is **\$2.80**, which is consistent with the previous wave.

- ▲ \$2.90, Wave 19
- \$2.80, Wave 23



Value for money

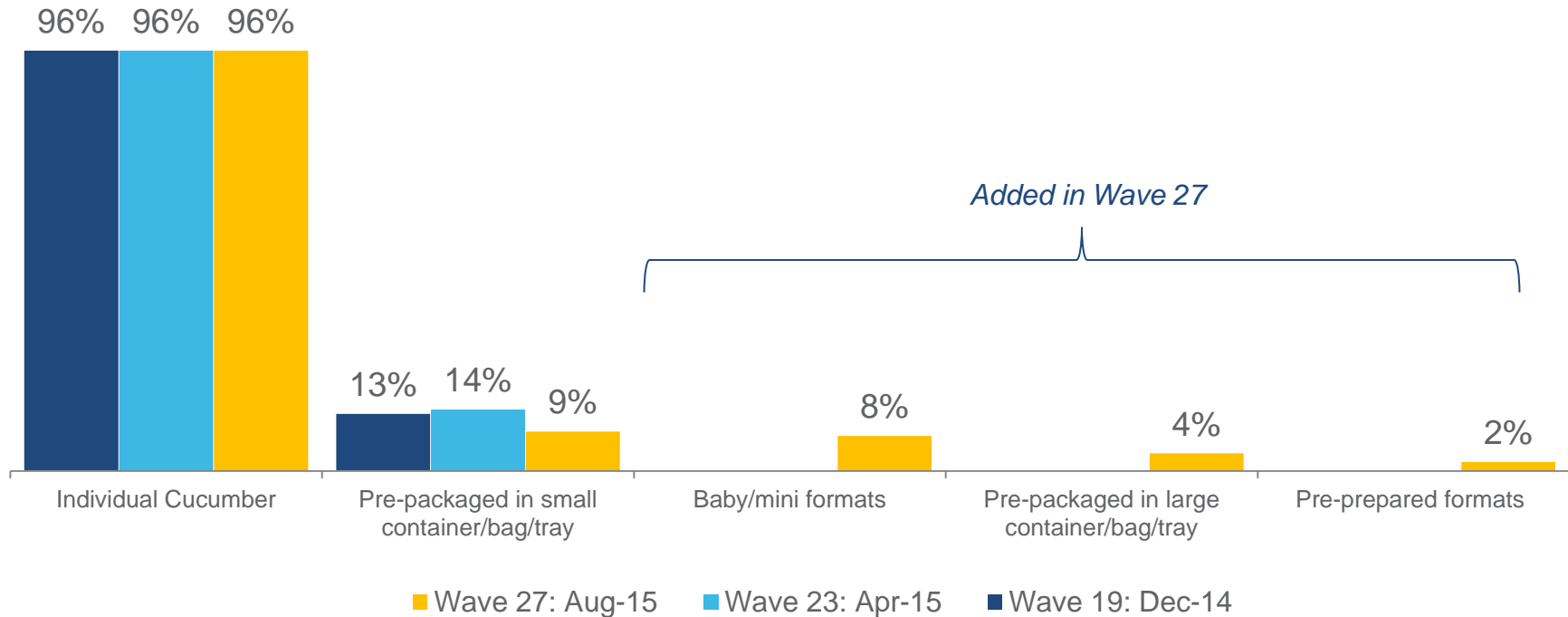
On average, consumers perceive Cucumber to be good value for money (**6.3/10**), which remains stable.

- ▼ 6.2/10, Wave 19
- 6.3/10, Wave 23

Q3. How much <commodity> do you typically purchase when you shop for it?
 Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
 Q4. Please indicate how Poor to Good Value you think this product is? 0-10 scale
 Sample Wave 19 N=359, Wave 23 N=308 and Wave 27 N=306



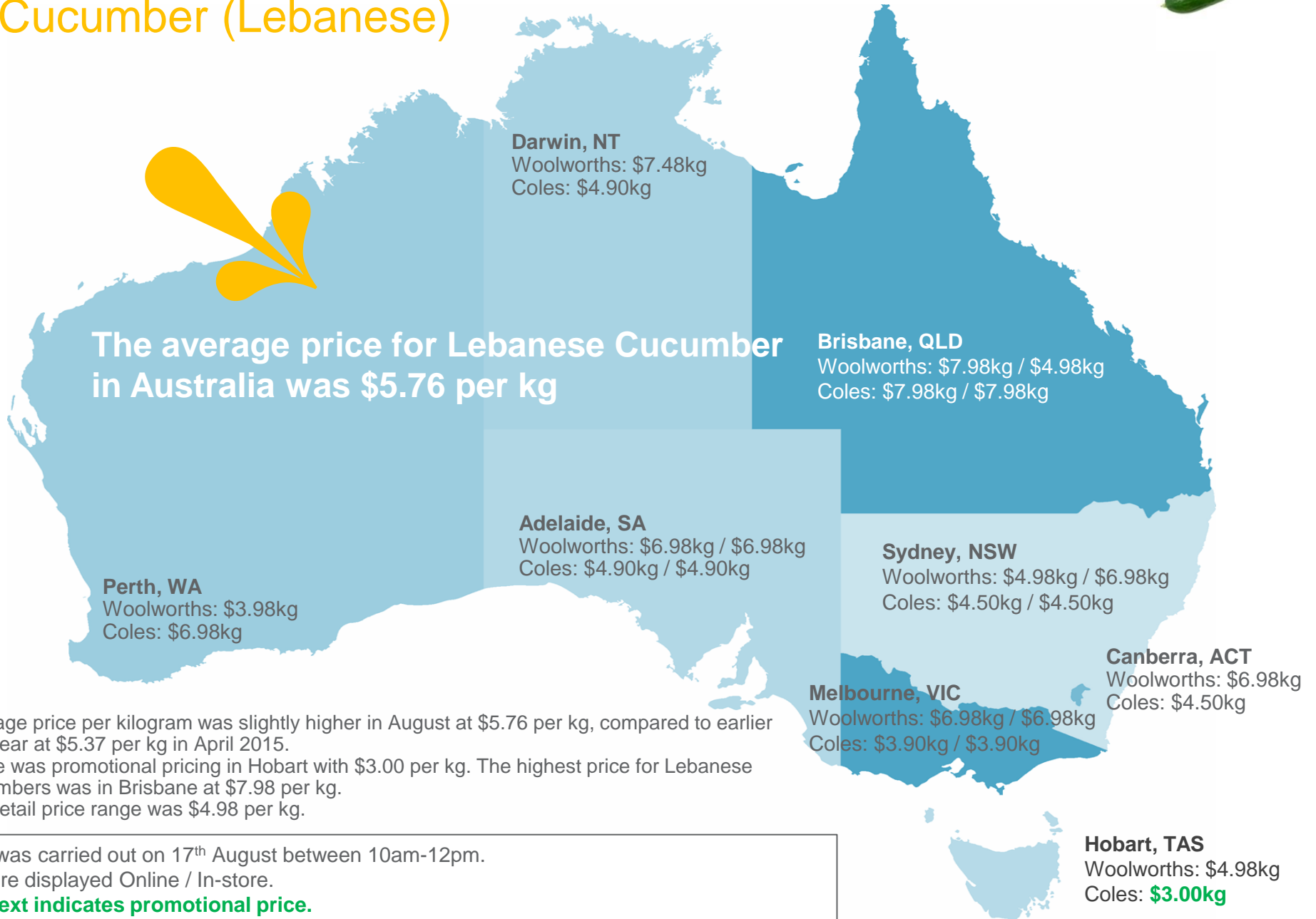
Purchase formats have remained stable across waves, with nearly all consumers purchasing individual cucumbers.



Q4b In what fresh formats do you typically purchase Cucumber?
Sample Wave 19 N=359, Wave 23 N=308 and Wave 27 N=306

Online and In-store Commodity Prices

Cucumber (Lebanese)



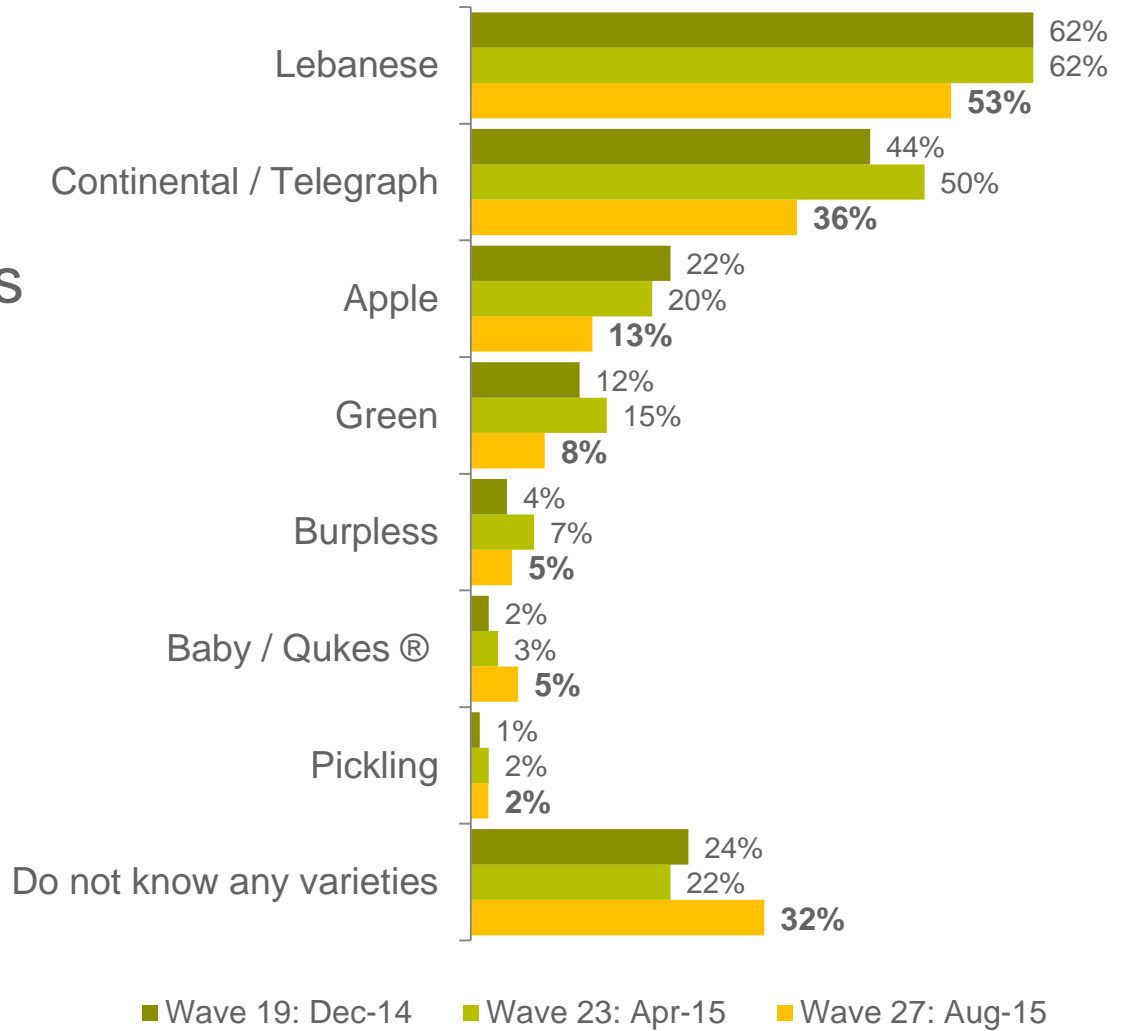
- Average price per kilogram was slightly higher in August at \$5.76 per kg, compared to earlier this year at \$5.37 per kg in April 2015.
- There was promotional pricing in Hobart with \$3.00 per kg. The highest price for Lebanese cucumbers was in Brisbane at \$7.98 per kg.
- The retail price range was \$4.98 per kg.

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



Spontaneous awareness of cucumbers is lower this wave.

There is a decrease in recall of all varieties except for Baby/Qukes.



Q6a. What types/varieties of <commodity> are you aware of? (unprompted)
Sample Wave 19 N=359, Wave 23 N=308 and Wave 27 N=306

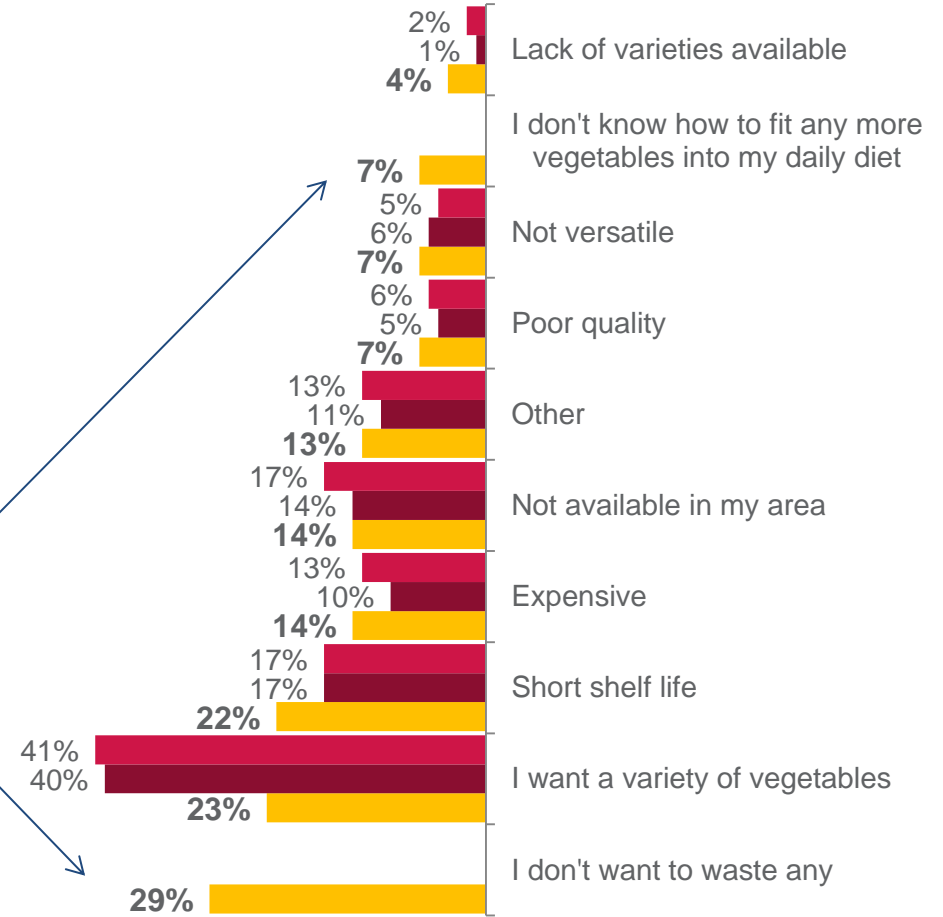
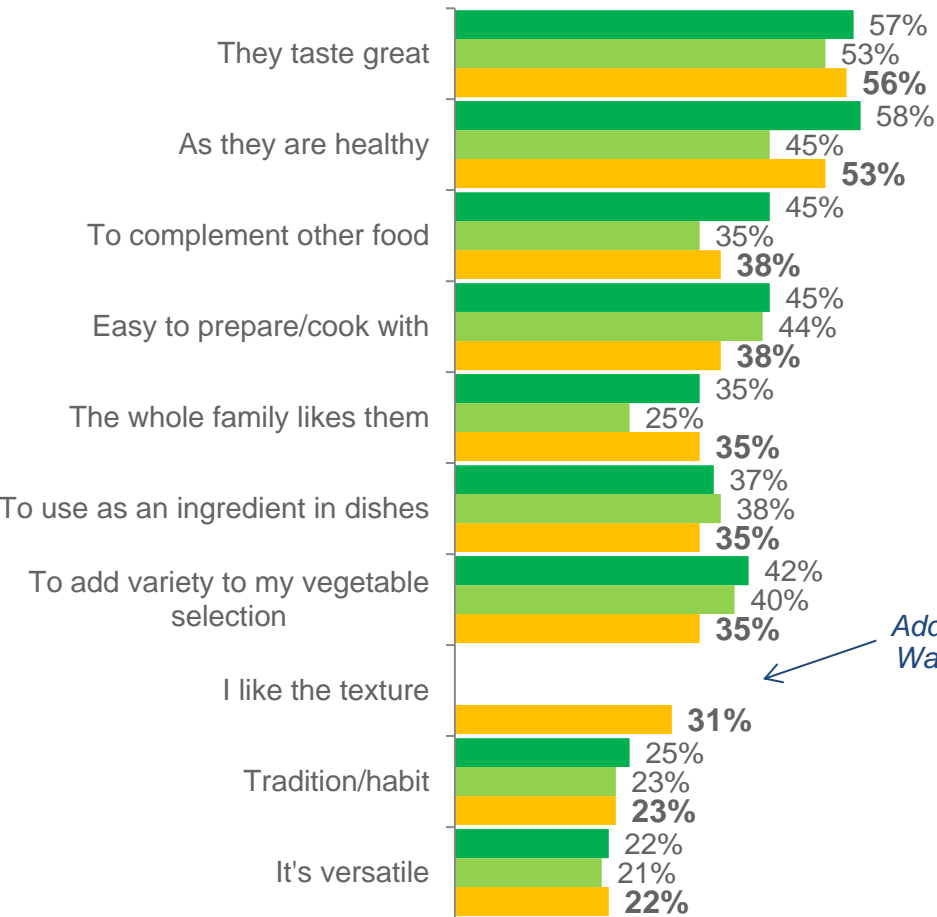


Taste and health remain the key influences on purchase. Not wanting to waste is the key barrier. This wave sees a substantial decrease in wanting a variety of vegetables in their diet as a barrier.



Triggers

Barriers



Added in Wave 27

■ Wave 19: Dec-14 ■ Wave 23: Apr-15 ■ Wave 27: Aug-15

■ Wave 19: Dec-14 ■ Wave 23: Apr-15 ■ Wave 27: Aug-15

Q7. Which of the following reasons best describes why you purchase <commodity> ?
 Q8. Which reason best describes why you don't buy <commodity> more often?
 Sample Wave 19 N=359, Wave 23 N=308 and Wave 27 N=306



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

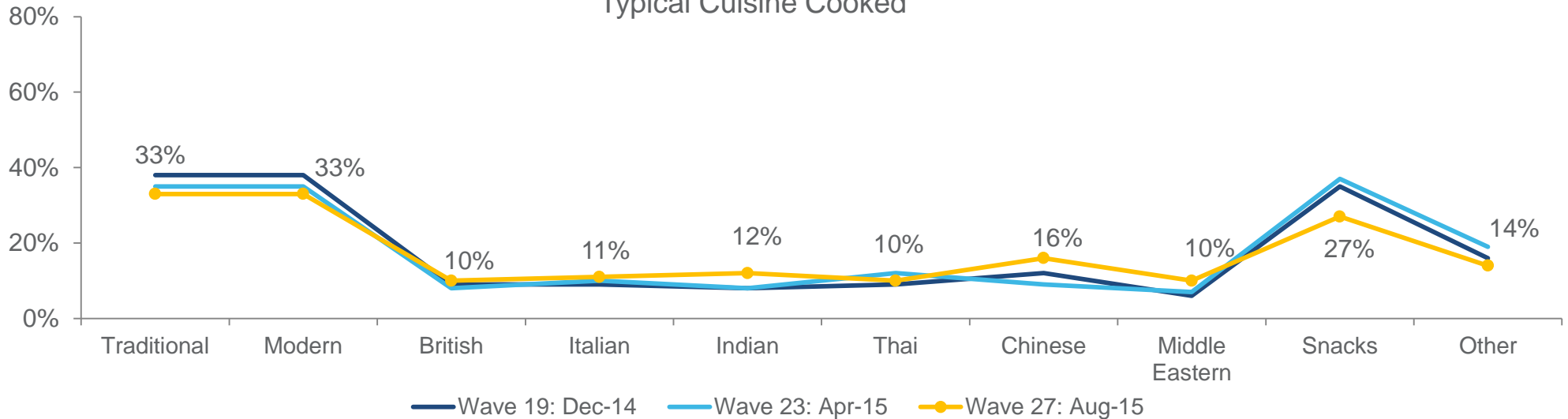
It is primarily cooked in Australian cuisine. This wave sees a decline in the preparation and cooking of snacks (i.e. salads, sandwiches).

Top 5 Consumption Occasions



Lunch	57%
Dinner	57%
Quick Meals	46%
Family Meals	40%
Weekday Meals	34%

Typical Cuisine Cooked



← Australian → ← European → ← Asian → ← Other Cuisines →

Q10. What cuisines do you cook/consume that use <commodity> ?
 Q11. Which of the following occasions do you typically consume/use <commodity> ?
 Sample Wave 19 N=359, Wave 23 N=308 and Wave 27 N=306



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

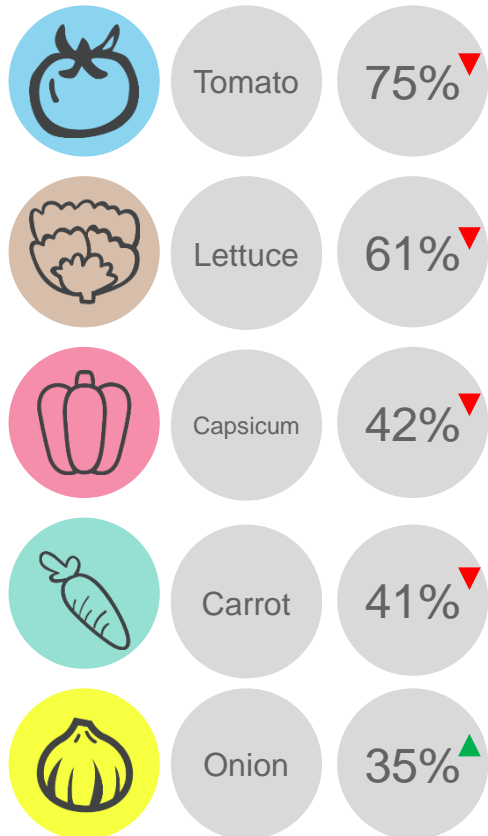


Cucumbers are generally served with tomato, lettuce and capsicum. This is consistent with salad and sandwich ingredients.



Cucumbers are generally consumed raw rather than being cooked, consistent with past months.

Accompanying Vegetables



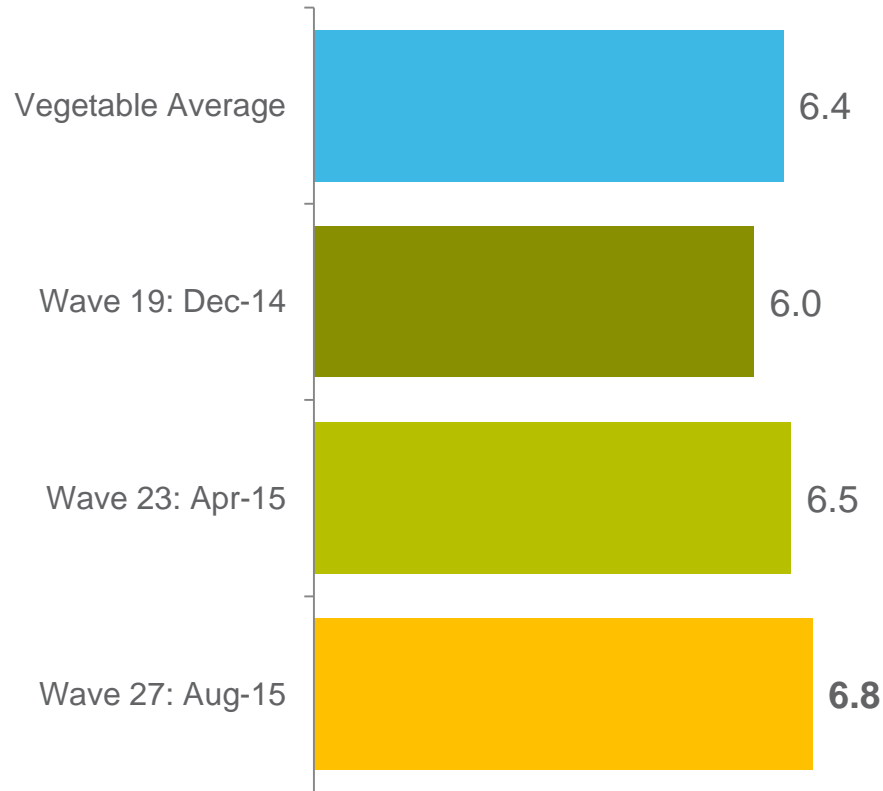
Top Cooking Styles

	Wave 19	Wave 23	Wave 27
Raw	77%	77%	79%
Stir frying	12%	10%	13%
Other	16%	16%	12%
Soup	4%	5%	7%
Deep Frying	1%	1%	5%
Steaming	4%	3%	5%
Roasting	3%	2%	4%
Grilling	4%	1%	4%
Boiling	3%	1%	4%
Sautéing	3%	1%	4%

Q9. How do you typically cook <commodity> ?
 Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
 Sample Wave 19 N=359, Wave 23 N=308 and Wave 27 N=306



The residual effects from media coverage relating to provenance and Australian grown produce is still positively impacting cucumbers. Importance of provenance for cucumbers are above the Vegetable Average.



Q14. When purchasing <commodity>, how important is Provenance to you?
Q15. And when purchasing Cucumber, how important is that it is grown in Australia?
Sample Wave 19 N=359, Wave 23 N=308 and Wave 27 N=306

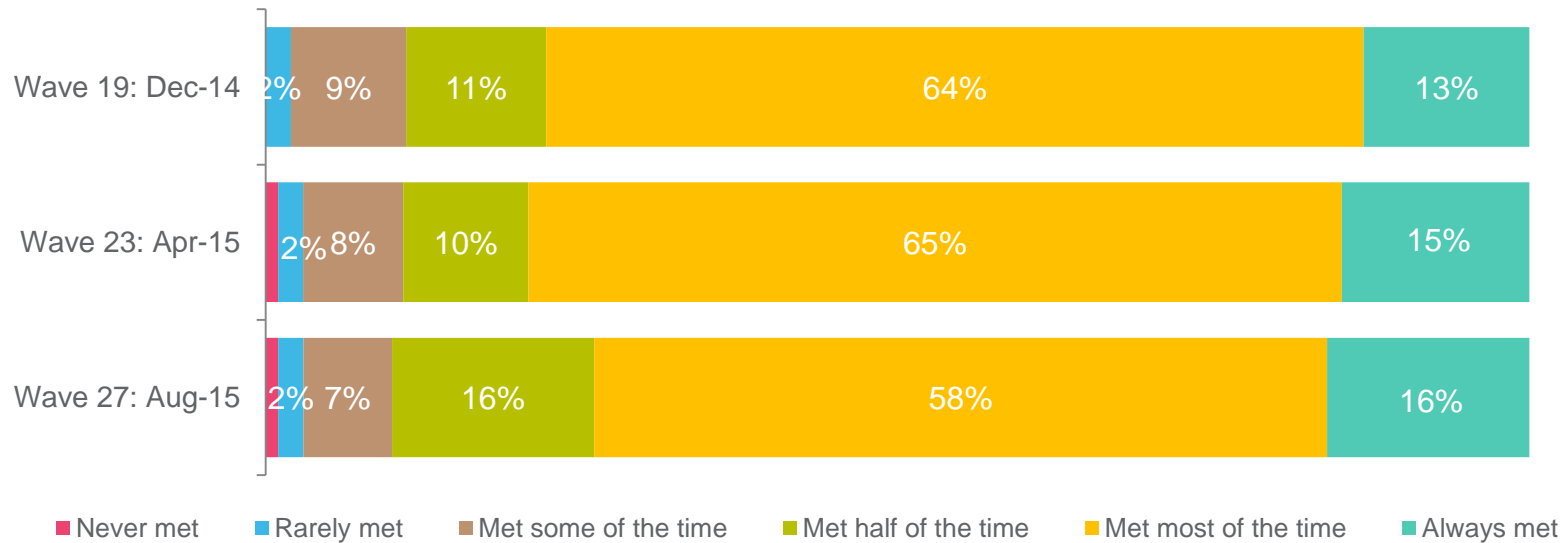


Consumers expect cucumbers to remain fresh for just over a week. Expectations of freshness are generally being met most of the time.

Expected to stay fresh for 8.1 days

▼ 7.8 days, Wave 19
▼ 7.6 days, Wave 23

Expectations Met



Q12. How long do you expect <commodity> to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy <commodity> ?
Sample Wave 19 N=359, Wave 23 N=308 and Wave 27 N=306



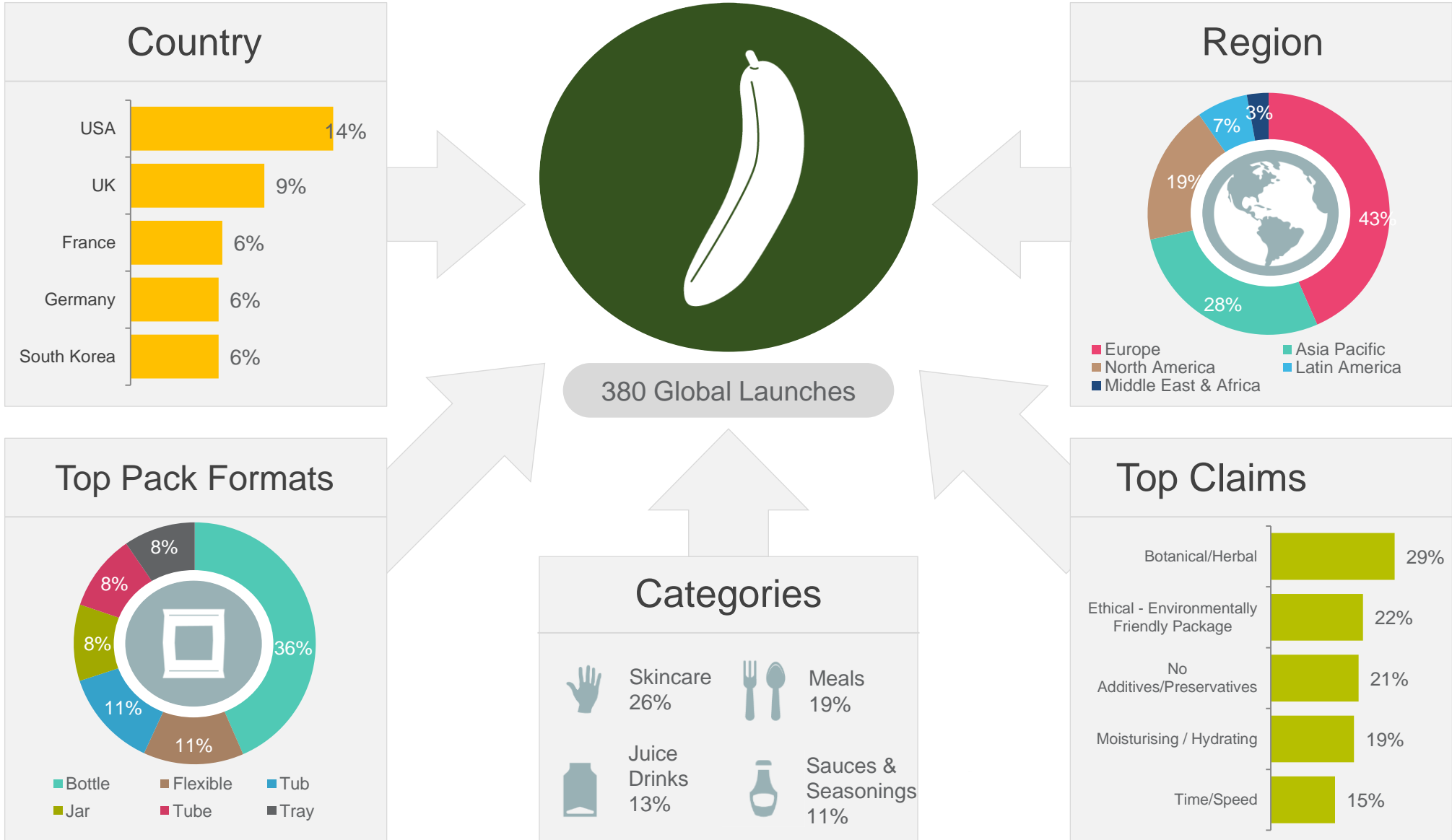
Trends: Cucumber



Cucumber Launches

August – October 2015

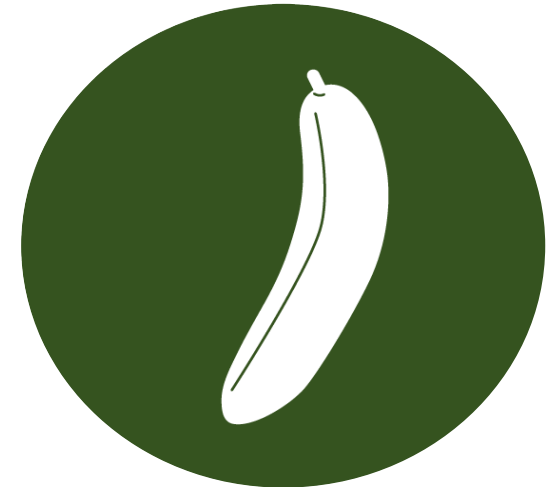
There were 380 products launched globally in the last three months that contained cucumber as an ingredient. The majority of launches occurred in Europe and Asia Pacific regions. The key categories for launches were skincare, meals, juice drinks and sauces.





Cucumber Product Launches: Last 3 Months (August – October 2015) Summary

- There were 380 cucumber products launched globally. This was substantially higher than the previous wave (N=263).
- There were 22 products containing cucumber were launched in Australia over the last three months. These were primarily salads, juices, and beauty & skincare products.
- Key regions for launch were Europe (43%) and Asia Pacific (28%).
- Bottles (36%), Flexible (11%) and Tubs (11%) were the most common packaging formats used, consistent between waves.
- Top category launches were skincare (26%), meals (19%) and juice drinks (13%).
- The top claims used for products were botanical/herbal (29%), environmentally friendly packaging (22%) and no additives/preservatives (21%).
- The most innovative launch was a cucumber ale from Canada (examples of these can be found in the following pages).



Source: Mintel (2015)

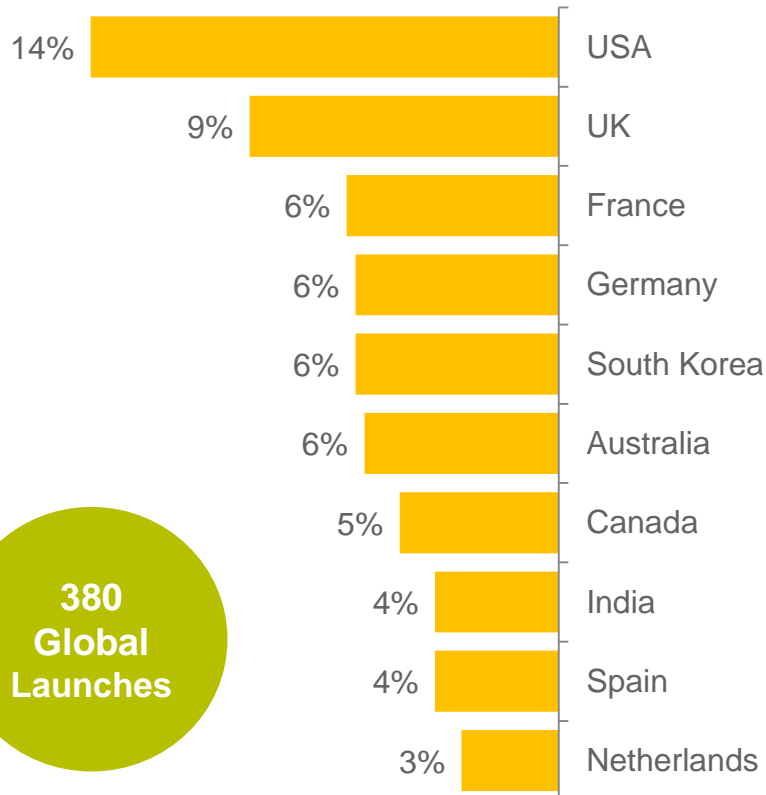




Cucumber Launches

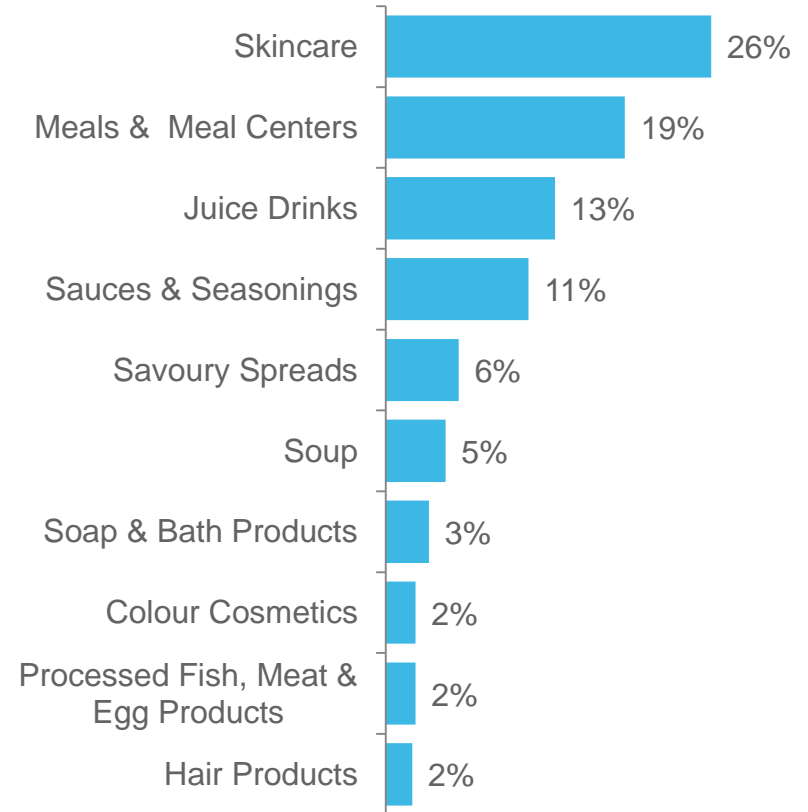
- USA and the UK were the main countries of launch for cucumber products.
- Products were primarily skincare, meals, juice drinks and sauces.

Top Launch Countries



380
Global
Launches










Top Launch Categories














The main claims used on products were botanical/herbal and ethical – environmentally friendly packaging. Bottle, flexible and tub formats were typical packaging formats used, consistent with previous waves.

Pack Formats Used

Global		Bottle	36%
		Flexible	11%
		Tub	11%
Europe		Bottle	27%
		Tub	21%
		Tray	16%
Asia Pacific		Bottle	31%
		Flexible	18%
		Jar	15%

Top Claims Used

Global		Botanical/Herbal	29%
		Ethical - Environmentally Friendly Package	22%
		No Additives/Preservatives	21%
Europe		Ethical - Environmentally Friendly Package	24%
		Botanical/Herbal	21%
		No Additives/Preservatives	16%
Asia Pacific		Botanical/Herbal	38%
		Moisturising/Hydrating	24%
		No Additives/Preservatives	21%

➤➤➤ Innovative Cucumber Launches: L3M (August – October 2015)

Huggies One & Done Refreshing Cucumber & Green Tea Wipes (Brazil)

Huggies One & Done Refreshing Cucumber & Green Tea Wipes are formulated with a refreshing and gentle formula and feature Triple Clean layers. These MI- and alcohol-free wipes are claimed to offer better performance with one wipe compared to Huggies Simply Clean Wipes, and retail in a pack containing 64 wipes, each measuring 19.5cm x 17cm.



Claims:
Botanical/Herbal, Alcohol Free, Babies & Toddlers (0-4), Ease of Use

Compliments Cucumber Dressing (Canada)

Compliments Cucumber Dressing is now available in a newly shaped and redesigned packaging. The product retails in a 475ml bottle.



Claims:
N/A

Steamworks Killer Cucumber Ale (Canada)

Steamworks Killer Cucumber Ale is now available. This ale is crisp, firm and refreshing, features golden, promise, Vienna, and wheat malts, tuggles and cascade hops, and a hazy golden colour. Additionally, this ale has been made using organic cucumber. The product retails in a pack containing six 355ml bottles and featuring the Facebook, Twitter, and Instagram logos.



Claims:
Organic, Social Media

Primavika Cucumber & Chickpeas Paste (Poland)

Primavika Paszтет Ogorkowy z Cieciorka (Cucumber & Chickpeas Paste) has been repackaged. It is suitable for vegetarians and vegans, and free from preservatives, colours, artificial aromas, monosodium glutamate and cholesterol. This pasteurised product now retails in a newly designed 160g recyclable jar.



Claims:
No Additives/Preservatives, Low/No/Reduced Cholesterol, Vegan, Ethical - Environmentally Friendly Package, No Animal Ingredients, Vegetarian

➤➤➤ Innovative Cucumber Launches: L3M (August – October 2015)

Doy Care Cucumber Soap (India)

Doy Care Cucumber Soap is now available in newly designed 4 x 125g pack featuring the brand's Facebook URL. Made from 100% vegetable oils, the product is enriched with pure nature actives and skin conditioning and emollient pure cucumber, which contain essential phytosterols, amino acids, vitamins and minerals that are said to act as a natural skin conditioner and collagen builder. According to the manufacturer, its astringent properties balance skin oils to tighten pores and tone,



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

Alteza Gazpacho (Spain)

Alteza Gazpacho is 100% natural and made with fresh ingredients. This gluten-free product retails in a 1L pack.



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

Tesco Dill Infused Cucumber (UK)

Tesco Dill Infused Cucumber is new to the range. This product consists of lightly pickled crunchy cucumber infused with dill in cider vinegar and is free from artificial preservatives, flavours and colours. It is suitable for vegetarians and retails in a 140g pack featuring the Nurture logo.



Claims:
No Additives/Preservatives, Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Ethical - Human, Convenient Packaging, Vegetarian

Want Want Cucumber and Lemon Flavoured Beverage (China)

Want Want Qing Gua Ning Meng Wei Guo Wei Yin Liao (Cucumber and Lemon Flavoured Beverage) is low in sugar, and contains added L-carnitine. This product retails in a 450ml pack featuring the WeChat link and a promotion to win prizes.



Claims:
Social Media, Low/No/Reduced Sugar

➤➤➤ Innovative Cucumber Launches: L3M (August – October 2015)

Heinz Table Sauce Variety Pack (Canada)

Heinz Table Sauce Variety Pack has been repackaged. It contains 1 x 375ml Heinz Yellow Mustard, which is free from artificial colours; 1 x 375ml Heinz Sweet Relish; and 1 x 375ml Heinz Tomato Ketchup. The product is said to be great for BBQ and retails in a eco-friendly package that is made of 100% recycled fibres and is 100% recyclable. The packaging features a recipe suggestion.



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

Estrella Tzatziki Flavoured Potato Crisps (Sweden)

Estrella Potatischips med Smak av Tzatziki (Tzatziki Flavoured Potato Crisps) are now available as one of the flavours of summer. The thin and crispy crisps are made from high quality potatoes, beneficial sunflower and rapeseed oils that have the same good fat composition as olive oil, and fine spices. They have a fresh taste of yogurt, grated cucumber and pressed garlic, and retail in a 275g recyclable pack featuring the Facebook logo.



Claims:
Seasonal, Social Media, Ethical - Environmentally Friendly Package

Rice Up Onigiri with Spicy Cucumber and Cream Cheese (Germany)

Rice Up Organic Onigiri Scharfe Gurke & Frischkäse (Onigiri with Spicy Cucumber and Cream Cheese) comprises juicy sushi rice and a tasty filling covered in a crispy roasted nori seaweed sheet. The vegetarian product is a perfect snack for on the go and retails in a 120g pack, bearing the EU Green Leaf logo.



Claims:
Organic, Vegetarian, On-the-Go

Zuko Limonada Cucumber Flavored Lemonade Mix (Mexico)

Zuko Limonada Polvo para Preparar Bebida Sabor a Limón y Pepino (Cucumber Flavored Lemonade Mix) is now available. This drink mix contains no added sugar, has been recommended by the Mexican College of Obesity and Nutrition, and does not require the addition of sugar to prepare. The product is fortified with vitamin C and retails in a 15g pack, enough to make 2L of drink and featuring the ESR logo.



Claims:
Vitamin/Mineral Fortified, Ethical - Environmentally Friendly Product, Low/No/Reduced Sugar



Australian Cucumber Launches: L3M (August – October 2015)

**Australian Pure Beauty
Sensitive Eye Make-Up
Remover**



**Impressed The Works Cold
Pressed Juice**



**Yes To Cucumbers Soothing
Hypoallergenic Facial
Towelettes**



**Copperpot Classic
Spartan's Terrific Tzatziki
Dip**



A close-up photograph of several green zucchinis with characteristic light-colored speckles. A large, dark grey circle is superimposed over the center of the image, containing the text 'Zucchini.' in white.

Zucchini.



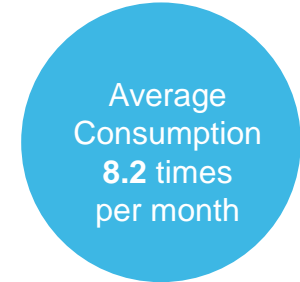
Consumption frequency of zucchini continues to trend upwards in Wave 27, whilst average purchase decreased.



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

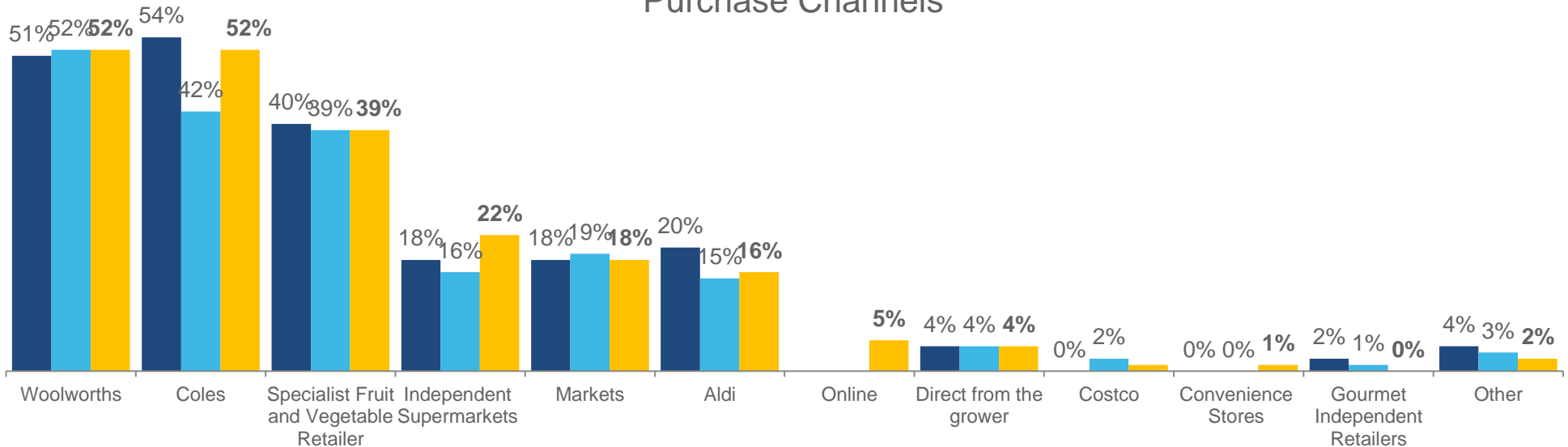


- ▼ 3.5 times, Wave 19
- ▲ 3.9 times, Wave 23



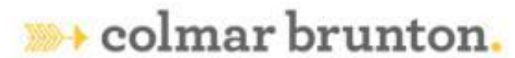
- ▼ 7.3 times, Wave 19
- ▼ 7.7 times, Wave 23

Purchase Channels



■ Wave 19: Dec-14 ■ Wave 23: Apr-15 ■ Wave 27: Aug-15

Q1. On average, how often do you purchase <commodity>?
 Q2. On average, how often do you consume <commodity>?
 Q5. From which of the following channels do you typically purchase <commodity>?
 Sample Wave 19 N=357, Wave 23 N=311 and Wave 27 N=303



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



Average Spend and Price Sensitivity



Average weight of purchase

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

- 700g, Wave 19
- 700g, Wave 23



Recalled last spend

The average recalled last spend is **\$3.00**, which is slightly below past waves.

- ▲ \$3.10, Wave 19
- ▲ \$3.10, Wave 23



Value for money

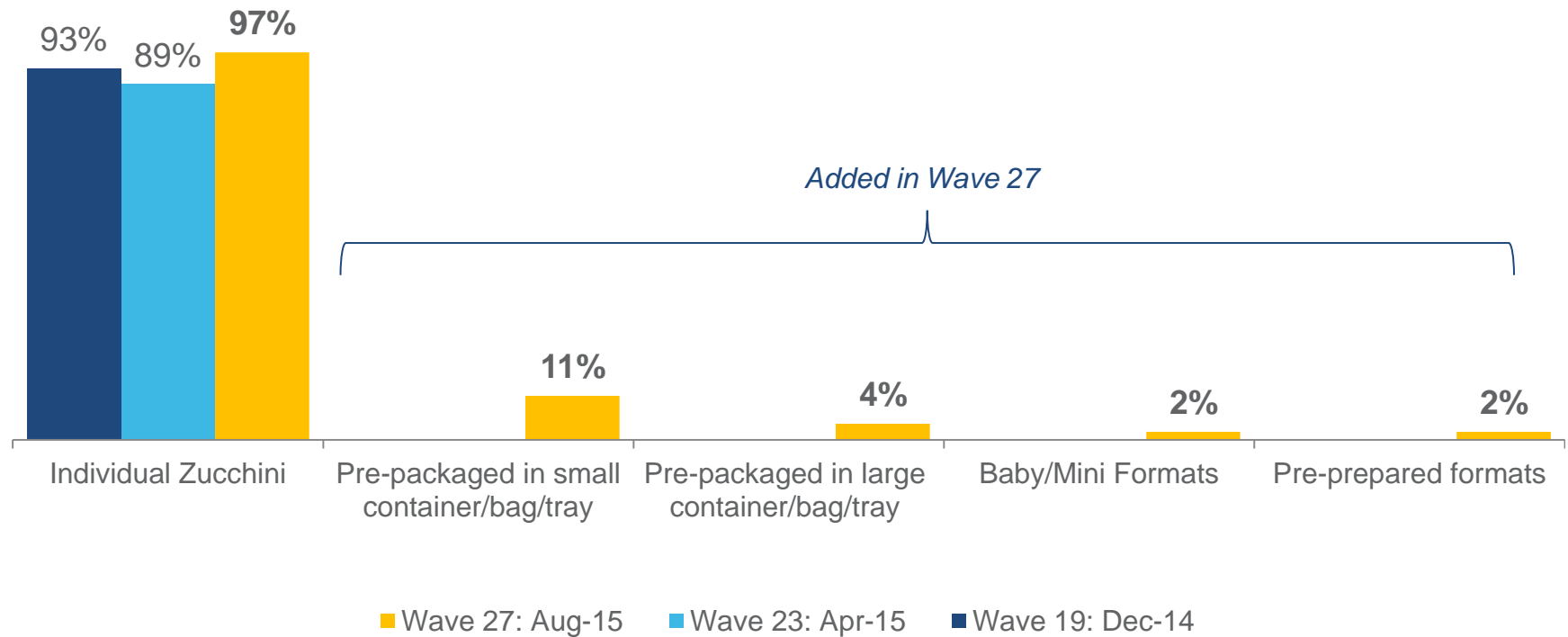
On average, consumers perceive zucchini to be good value for money (**6.5/10**), again consistent with the previous waves.

- 6.5/10, Wave 19
- 6.5/10, Wave 23

Q3. How much <commodity> do you typically purchase when you shop for it?
 Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
 Q4. Please indicate how Poor to Good Value you think this product is?
 Sample Wave 19 N=357, Wave 23 N=311 and Wave 27 N=303



This month sees an increase in the purchase of individual zucchini formats, which remains the most common format typically purchased.

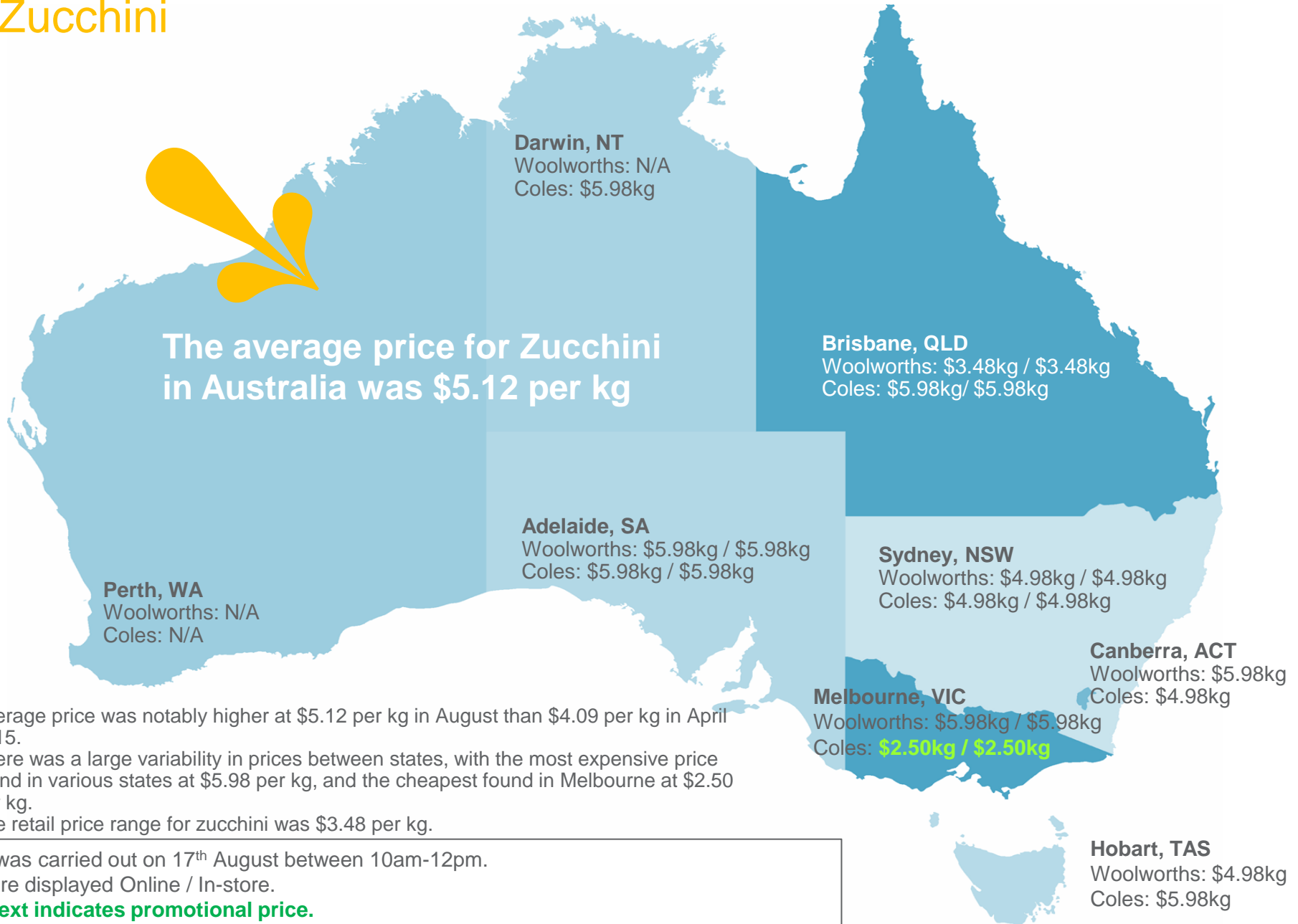


Q4b In what fresh formats do you typically purchase Zucchini?
Sample Wave 19 N=357, Wave 23 N=311 and Wave 27 N=303

Online and In-store Commodity Prices



Zucchini

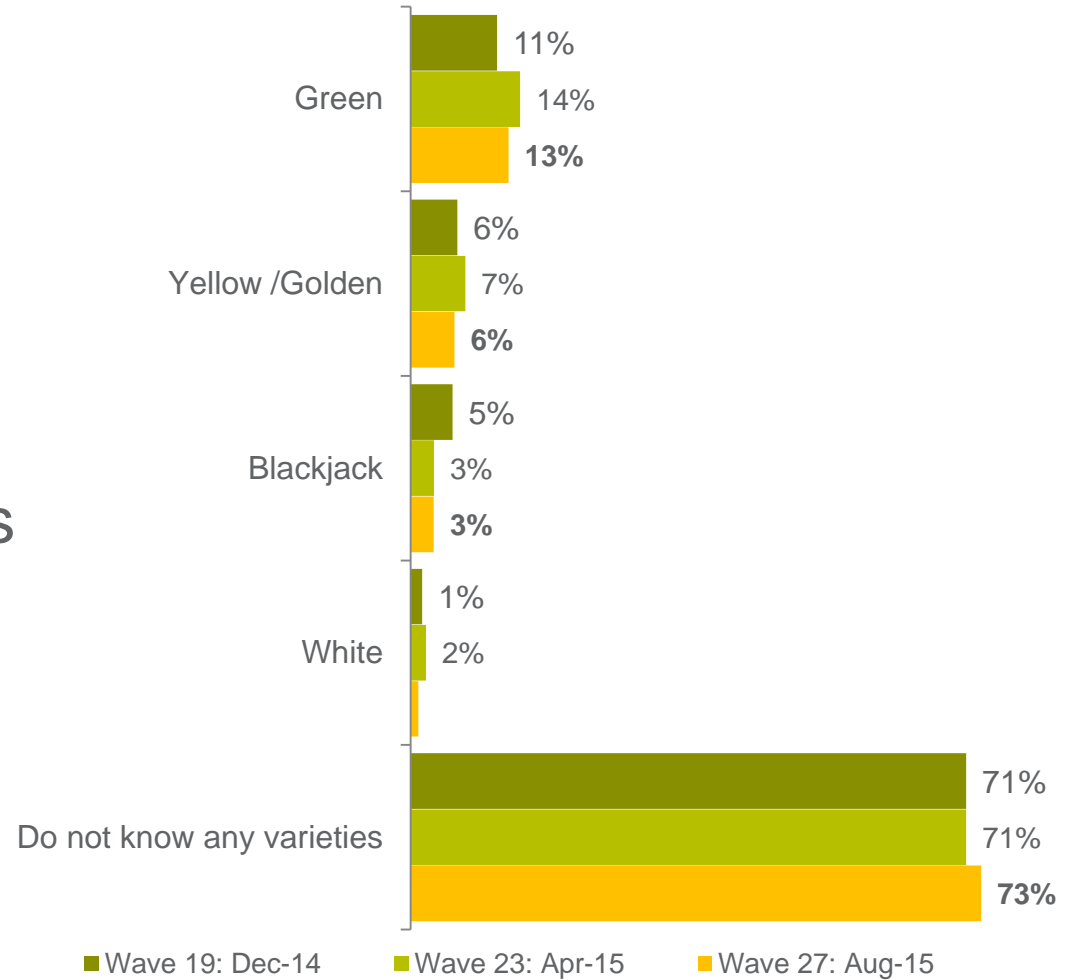


- Average price was notably higher at \$5.12 per kg in August than \$4.09 per kg in April 2015.
- There was a large variability in prices between states, with the most expensive price found in various states at \$5.98 per kg, and the cheapest found in Melbourne at \$2.50 per kg.
- The retail price range for zucchini was \$3.48 per kg.



Overall, awareness of zucchini varieties remains very low.

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

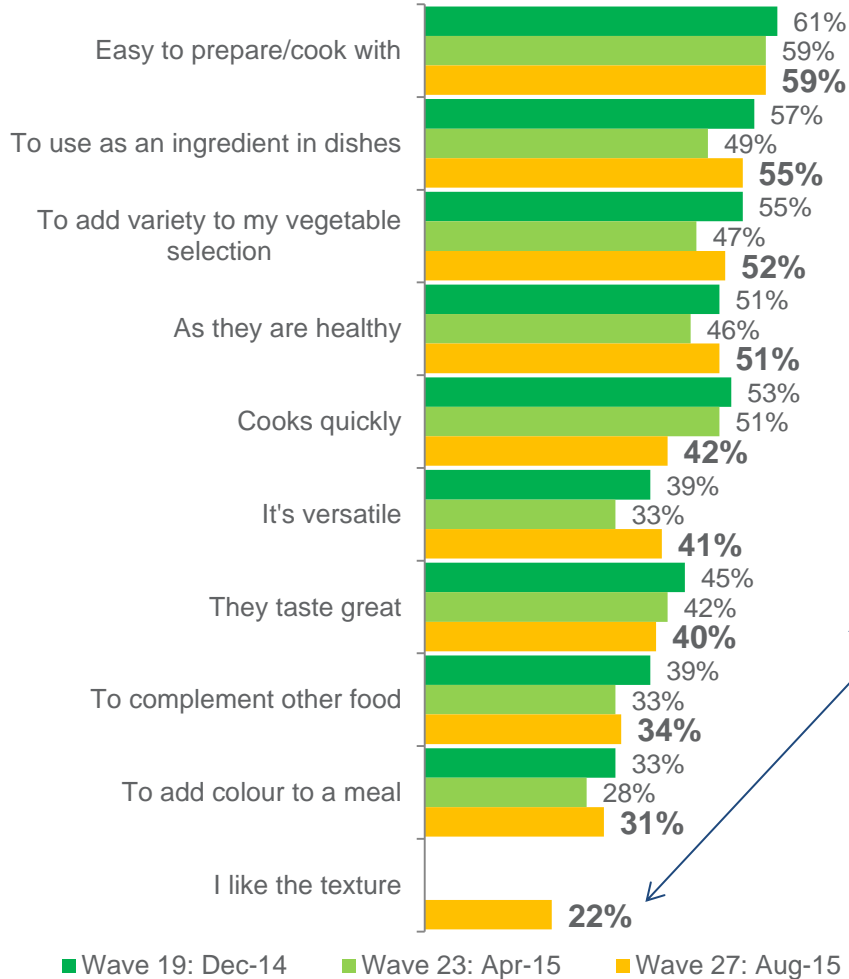




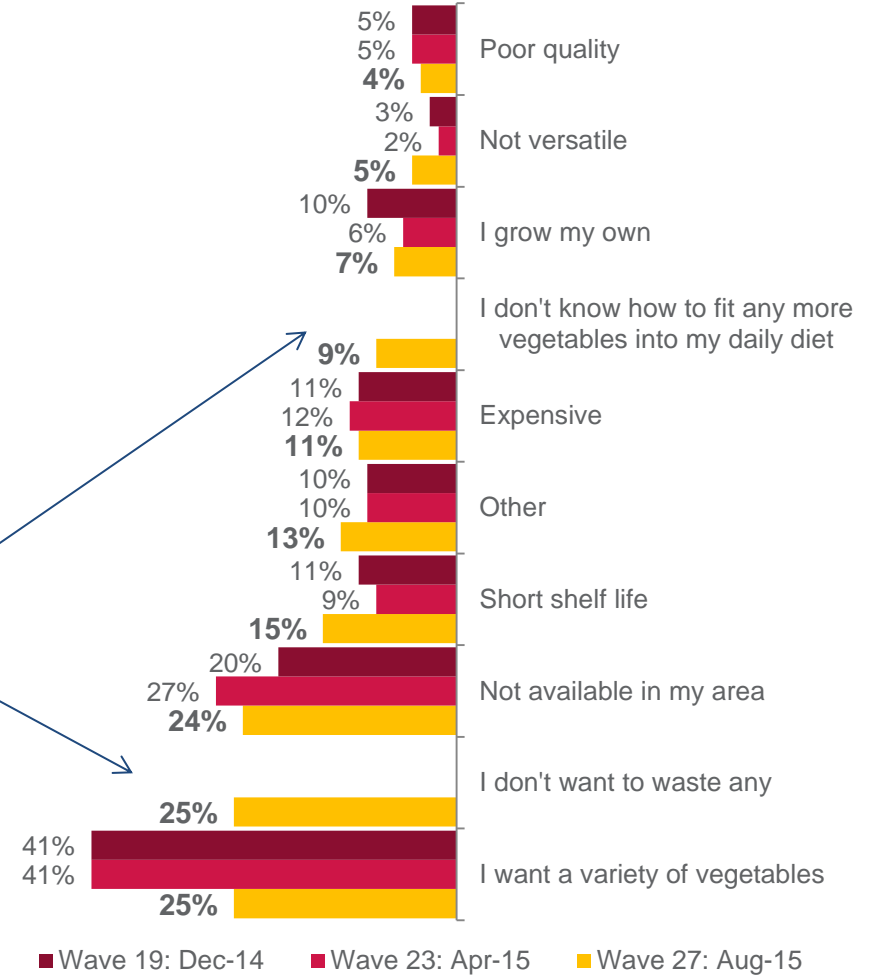
Ease of preparation and cooking are the key influences on purchase. The main barriers to purchase are that people want to buy a variety of vegetables and don't want to waste any, with the former substantially decreasing in percentage this wave.



Triggers



Barriers



Added in Wave 27

Q7. Which of the following reasons best describes why you purchase <commodity>?
 Q8. Which reason best describes why you don't buy <commodity> more often?
 Sample Wave 19 N=357, Wave 23 N=311 and Wave 27 N=303



Consumers prefer to cook zucchinis in Australian and Italian cuisine, consistent with past waves.

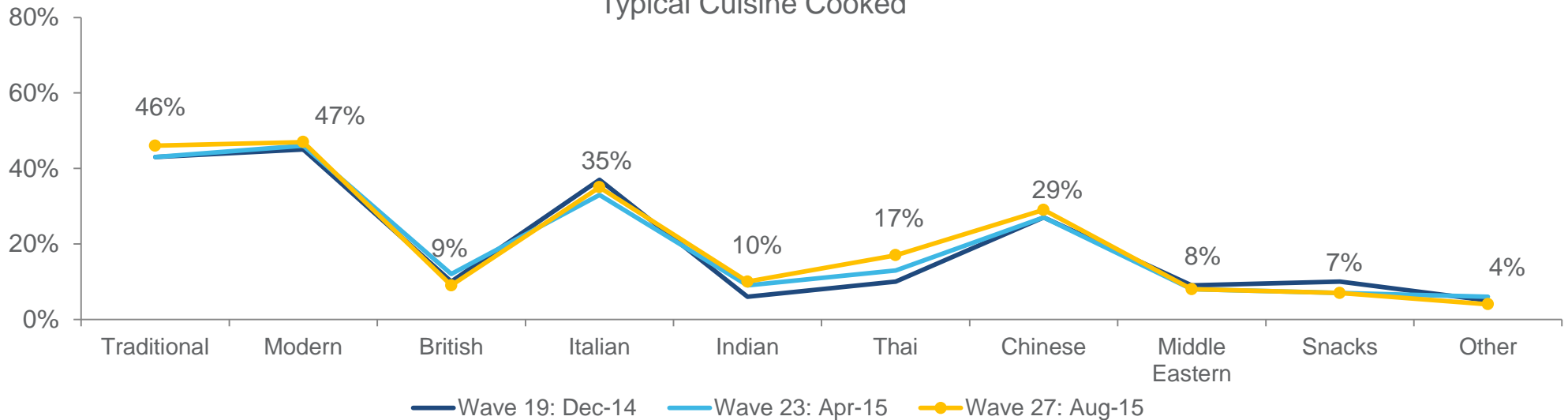
The main consumption occasions for zucchinis are dinners, family meals and quick meals.

Top 5 Consumption Occasions



Dinner	68%
Family Meals	58%
Quick Meals	44%
Weekday Meals	43%
Weekend Meals	36%

Typical Cuisine Cooked



← Australian → ← European → ← Asian → ← Other Cuisines →

Q10. What cuisines do you cook/consume that use <commodity>?
 Q11. Which of the following occasions do you typically consume/use <commodity>?
 Sample Wave 19 N=357, Wave 23 N=311 and Wave 27 N=303

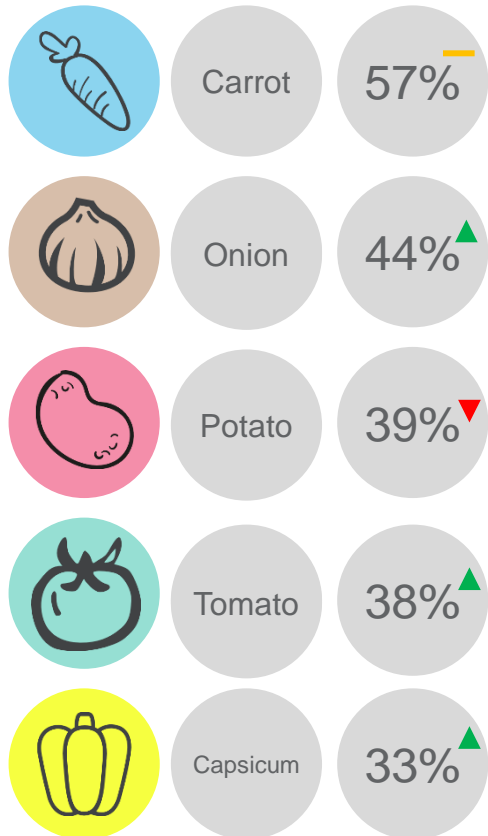


▼ : Indicates LOWER score than current wave.
 ▲ : Indicates HIGHER score than current wave.



Zucchini are popularly served with carrots, onions and potatoes. Stir-frying remains the main cooking technique used. Steaming continues to be popular, whilst soup continues to improve, in line with the seasonal changes. This wave also sees a spike in deep frying as a cooking style.

Accompanying Vegetables



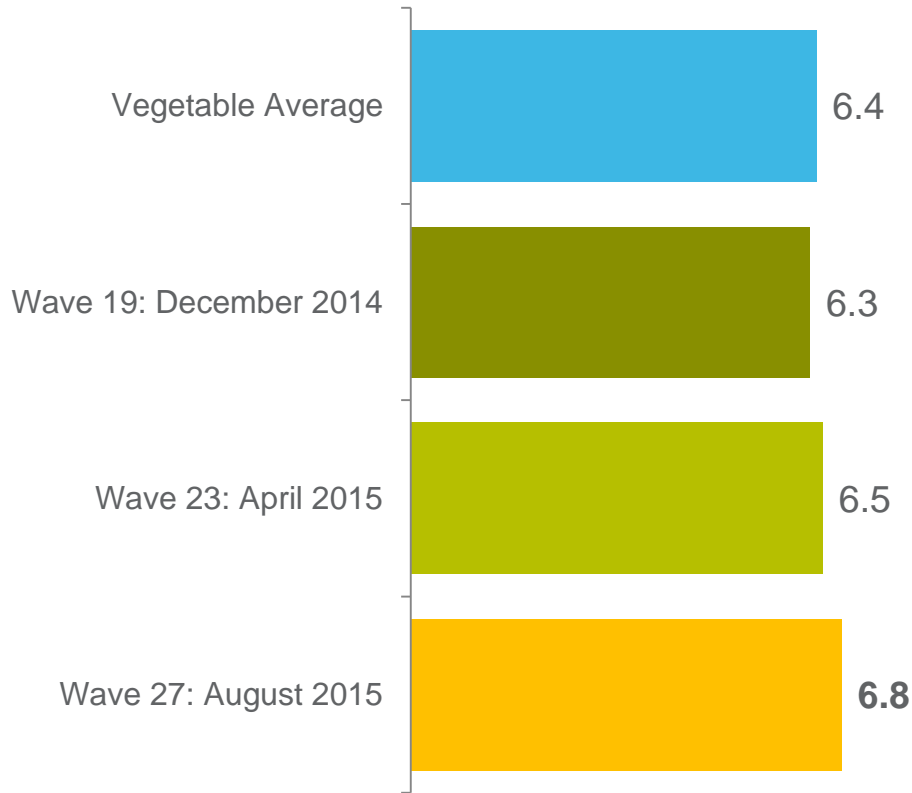
Top Cooking Styles

	Wave 19	Wave 23	Wave 27
Stir frying	55%	46%	53%
Steaming	40%	39%	40%
Soup	17%	23%	30%
Roasting	27%	25%	27%
Baking	22%	25%	27%
Sautéing	28%	21%	25%
Deep Frying	3%	2%	19%
Grilling	22%	18%	17%
Boiling	17%	14%	17%
Raw	17%	12%	13%

Q9. How do you typically cook <commodity>?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
Sample Wave 19 N=357, Wave 23 N=311 and Wave 27 N=303



The importance of zucchini provenance has increased across waves and now sits above the Vegetable Average.



Q14. When purchasing Zucchini, how important is Provenance to you?
Q15. And when purchasing Zucchini, how important is that it is grown in Australia?
Sample Wave 19 N=357, Wave 23 N=311 and Wave 27 N=303



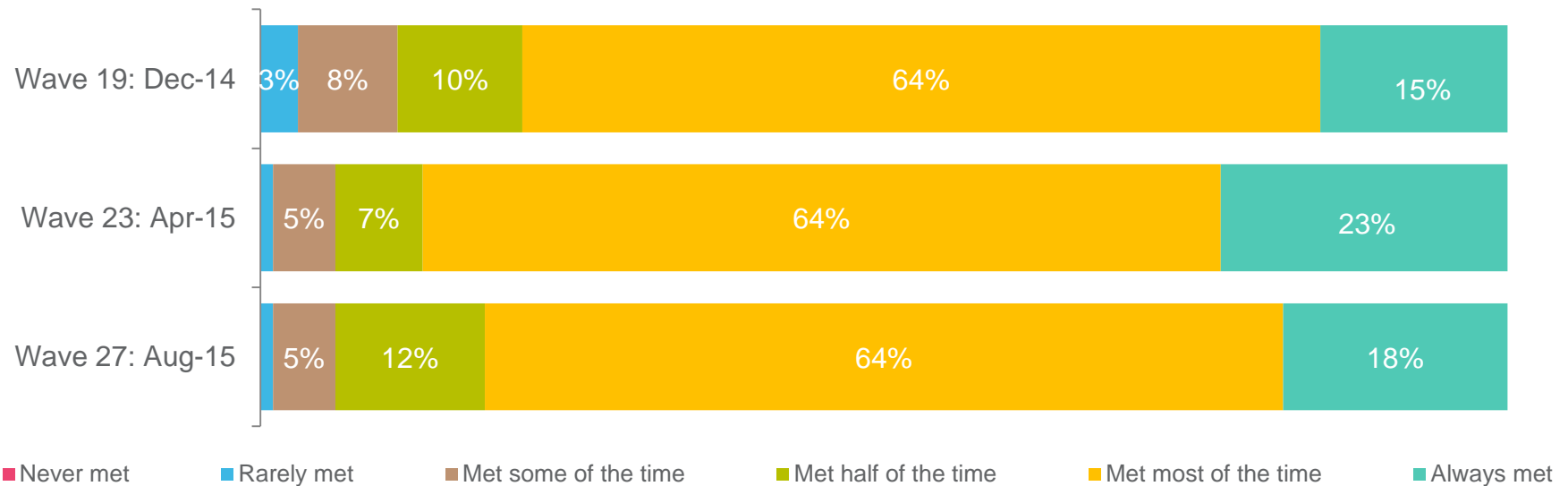
Consumers expect zucchini to remain fresh for eight days, which has remained relatively stable across seasons.

Expectations of freshness remain relatively consistent across waves, and are being met most of the time.

Expected to stay fresh for 8.2 days

▼ 7.8 days, Wave 19
▼ 7.9 days, Wave 23

Expectations Met



Q12. How long do you expect <commodity> to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy <commodity> ?
Sample Wave 19 N=357, Wave 23 N=311 and Wave 27 N=303



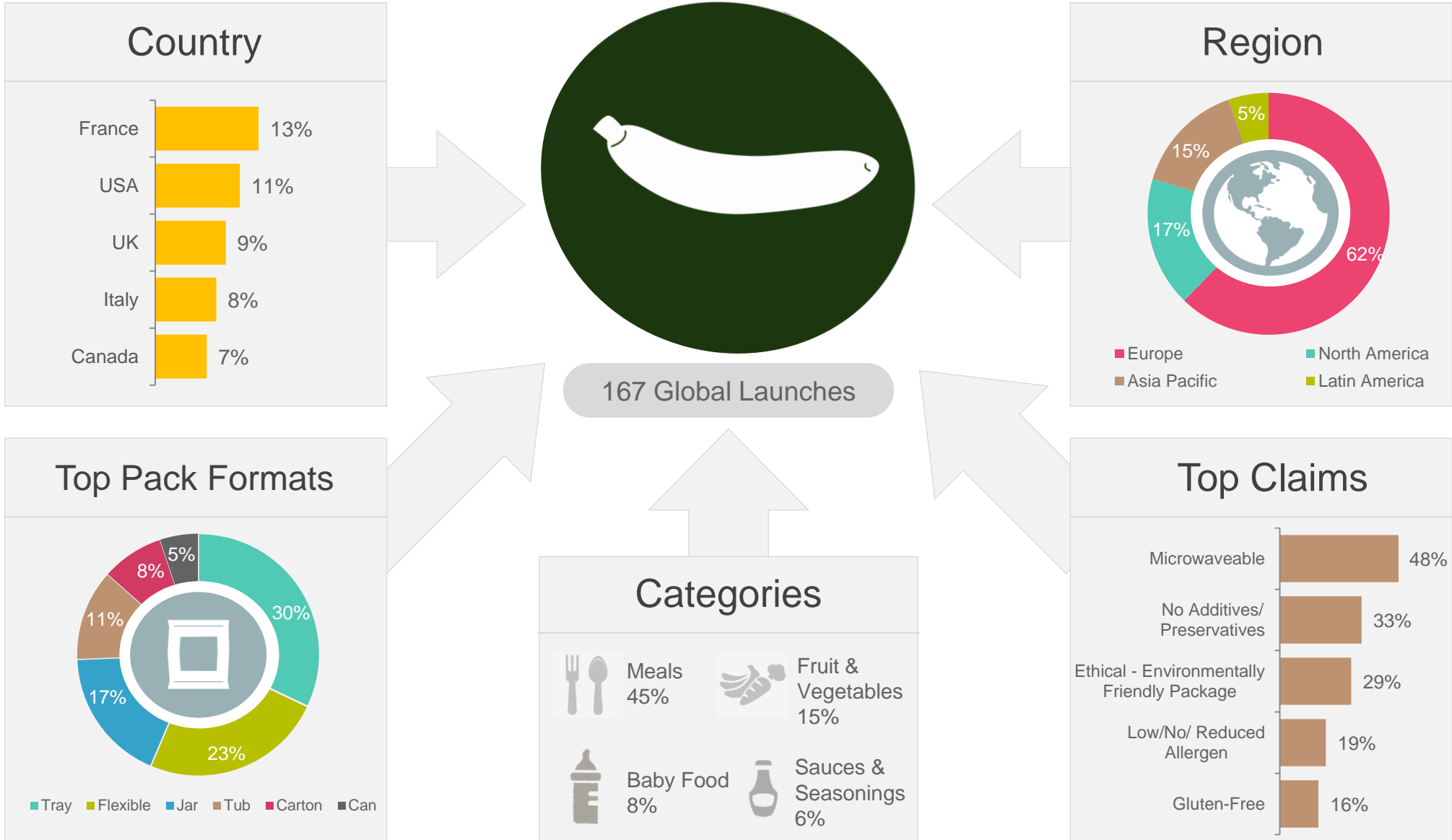
Trends: Zucchini



Zucchini Global Launches

August – October 2015

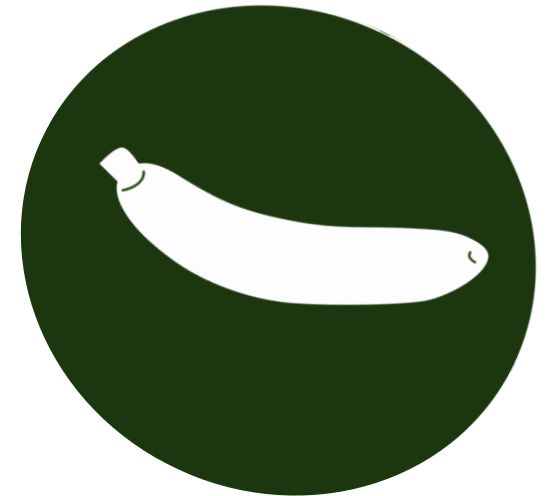
There were 167 zucchini products launched in the last three months. The majority of launches occurred in Europe. The key countries for launch included France, USA and the UK. Key categories for launches were meals, fruit & vegetables and baby food.





Zucchini Product Launches: Last 3 Months (August – October 2015) Summary

- There were 167 products launched globally in the last three months. This was consistent with past trends.
- Domestically, there were seven products launched that contained zucchini as an ingredient.
- Launches predominantly occurred in Europe (62%), followed by North America (17%).
- The most common packaging used for launches were tray (30%) and flexible (23%) formats.
- Meals (45%), fruit & vegetables (15%) and baby food (8%) were the main categories for launches, consistent with past waves.
- Microwavable (48%) remained the most common claim used for products. No additives/preservatives (33%) was also frequently used.
- The most innovative launches were the zucchini gingerbread carrot cookies from the USA (other examples can be found in the following pages).

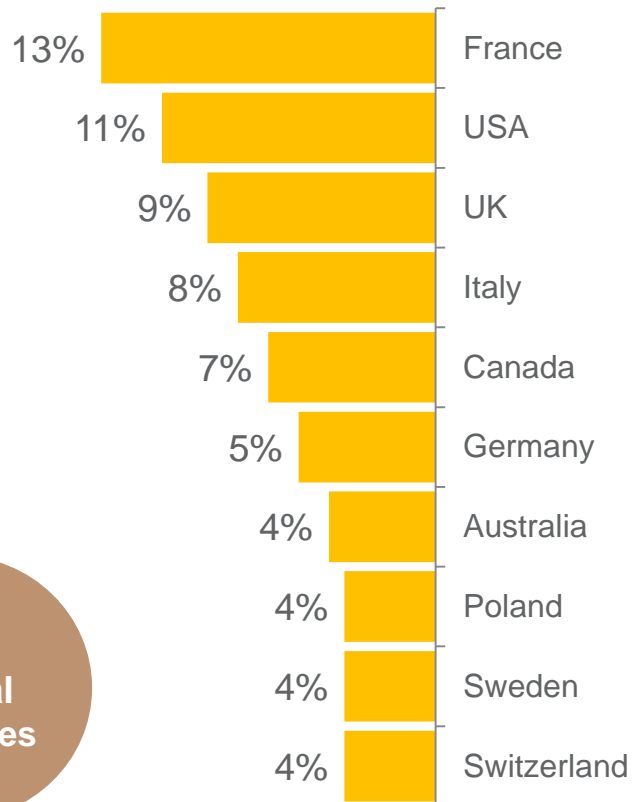




Zucchini Launches

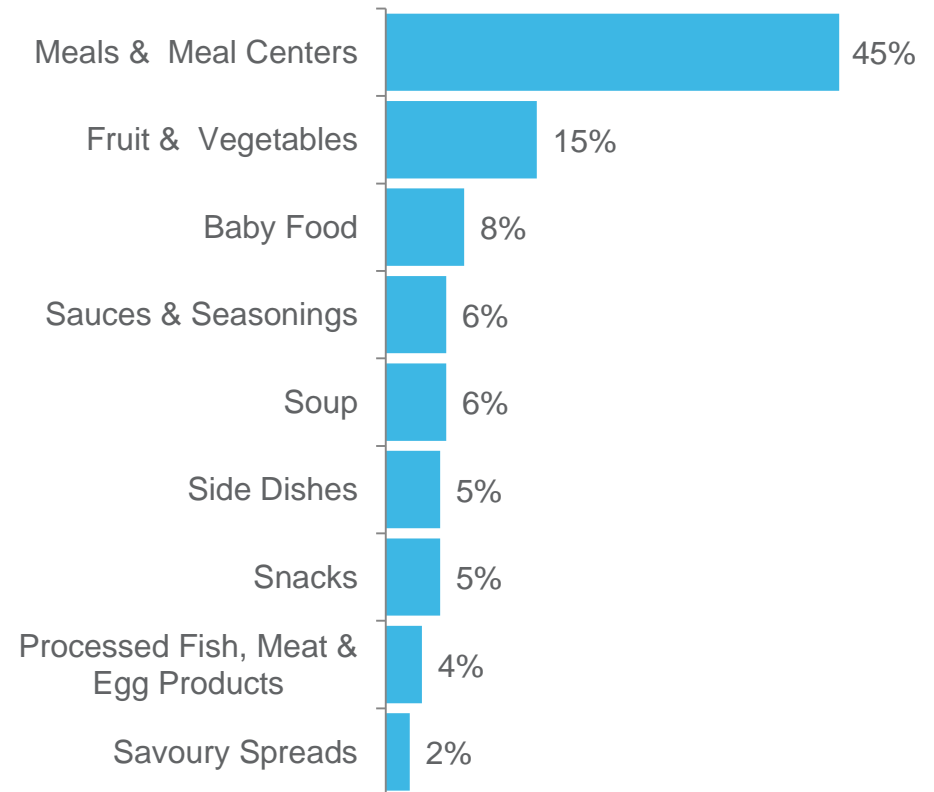
- ▶ France was the key country for launches over the last three months, followed by USA and the UK.
- ▶ Top categories for products were meals, fruit & vegetables and baby food.

Top Launch Countries



167
Global
Launches

Top Launch Categories





Tray and flexible packaging were the most common formats used for zucchini products, consistent with past months. Microwavable remains the key claim used on zucchini products.

Pack Formats Used

Global		Tray	30%
		Flexible	23%
		Jar	17%
Europe		Tray	29%
		Flexible	25%
		Jar	16%

Top Claims Used

Global		Microwaveable	48%
		No Additives/Preservatives	33%
		Ethical - Environmentally Friendly Package	29%
Europe		Microwaveable	41%
		Ethical - Environmentally Friendly Package	31%
		No Additives/Preservatives	20%

➤➤➤ Innovative Zucchini Launches: L3M (August – October 2015)

CedarLane Natural Foods Roasted Vegetable Tamales (USA)

CedarLane Natural Foods Roasted Vegetable Tamales contain Monterey jack and cheddar cheeses. This all-natural product is gluten-free, can be heated in the microwave and retails in a 10-oz. pack.



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

Findus Sofficini Mini Crepes with Zucchini, Ham and Provolone Cheese (Italy)

The product is claimed to be ideal for an informal dinner or a delicious aperitif with friends. It can be prepared in oven, pan or microwave and features a crunchy and golden breadcrumb coating. This canapés retail in a 240g pack, containing eight units and bearing Facebook logo.



Claims:
Social Media, Microwaveable

Maris Trio Caprice Grilled Vegetables (Russia)

Maris Ovoshchi na Grile Trio Kapriz (Trio Caprice Grilled Vegetables) are now available. The product retails in a 520g jar.



Claims:
N/A

Tesco Ploughman's Scotch Eggs (UK)

Tesco Ploughman's Scotch Eggs are now available with new product name and pack design. They contain port sausage meat with cheese and pickle, filled with a whole egg and coated in breadcrumbs. The product retails in a 227g pack for two units.



Claims:
N/A

»»» Innovative Zucchini Launches: L3M (August – October 2015)

Mellin Vegetable Broth (Italy)

Mellin Brodo di Verdure (Vegetable Broth) is now available in a newly designed pack. The product is said to be tasty, easy and quick to prepare and to contain selected and rigorously controlled vegetables. The broth can be used as an excellent base for various dishes for the whole family, including baby dishes. It retails in an 80g pack featuring a Facebook logo, and containing 10 x 8g single-dose sachets.



Claims:
Ease of Use, Social Media, Time/Speed

Thiriet Bonbon-Shaped Crispy Assortment (France)

It includes the following four varieties: Red Thai-Style Bonbon filled with shrimp, small vegetables, ginger and coriander; Orange Tajine-Style Bonbon filled with chicken fillet, small vegetables, dried raisins, dried almond, coriander and cinnamon; Yellow Indian Bonbon filled with chicken fillet, courgette, dried raisins and curry; and Beige Italian Bonbon filled with mozzarella, goat's cheese, black olive and pesto.



Claims:
Ease of Use, Ethical - Environmentally Friendly Package

Italiamo Pasta Bake with Vegetables & Meatballs (Sweden)

Italiamo Pastagrätäng med Köttbullar och Grönsaker (Pasta Bake with Vegetables & Meatballs) comprises penne pasta, vegetables and meatballs. This microwavable product retails in a partly recyclable 450g pack.



Claims:
Ethical - Environmentally Friendly Package, Microwaveable

Renaissance Food Group Mexican Stir Fry (USA)

Renaissance Food Group Mexican Stir Fry is now available. The product retails in a 11.5-oz. pack featuring cooking instructions.



Claims:
N/A

»»» Innovative Zucchini Launches: L3M (August – October 2015)

Bitsy's Brainfood Smart Cookies Zucchini Gingerbread Carrot Cookies (USA)

The product is said to be an excellent source of omega-3, EPA and DHA, contains vitamins A, B12, B6, D3, calcium and iron and features alphabet shapes. These cookies are made with organic whole wheat flour and carrots, they are free of nuts and GMOs and are said to contain 8g or more of whole grain per serving.



Claims:
Low/No/Reduced Allergen, GMO-Free, Kosher, Organic, Social Media, Children (5-12), Wholegrain

Keep Light Carnes Super Zucchini Lasagna (Brazil)

Keep Light Carnes Super Lasanha de Abobrinha (Super Zucchini Lasagna) is made with selected ingredients, is low in sodium and free from gluten and preservatives. The quick and easy to prepare product is microwaveable, and retails in a 260g pack featuring a QR code and the Facebook and Twitter logos.



Claims:
No Additives/Preservatives, Low/No/Reduced Allergen, Social Media, Slimming, Time/Speed, Microwaveable, Ease of Use, Gluten-Free, Low/No/Reduced Sodium

Casa Verde Gourmet Grilled Marinated Zucchini (Colombia)

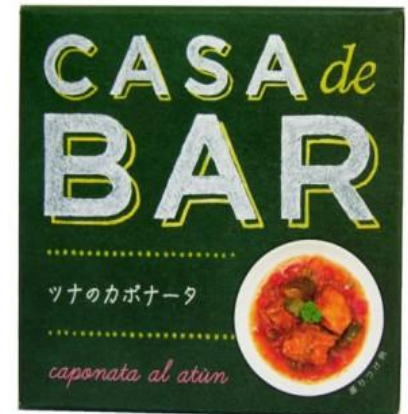
Casa Verde Gourmet Zucchini Grilled Marinado (Grilled Marinated Zucchini) is new to the range. This product can be consumed with meat and salad, and retails in a 220g pack



Claims:
N/A

Casa de Bar Tuna Caponata (Japan)

Casa de Bar Tuna Caponata is said to go well with wine. It features rich tomato, tuna and summer vegetables finished with white wine. This product retails in a 65g pack. Launched on March 1st 2015 with an RRP of 378 yen.



Claims:
N/A



Australian Zucchini Launches: L3M (August – October 2015)

Woolworths Created with Jamie Sticky BBQ Beef & Cajun Rice Meal Kit

Woolworths Created with Jamie Sticky BBQ Beef & Cajun Rice Meal Kit is made with Aussie beef with chunky Aussie veggies and contains no added hormones. This Australian made product is designed to be cooked in just 10 minutes following five simple steps. It contains no artificial colours or flavours, and retails in a 750g recyclable pack.



Claims:
No Additives/Preservatives, Hormone Free, Ethical - Environmentally Friendly Package, Ethical - Animal, Ease of Use, Time/Speed

Rafferty's Garden Risoni Pasta & Garden Veggies Lumpy Baby Food

Rafferty's Garden Risoni Pasta & Garden Veggies Lumpy Baby Food is specially designed for babies over ten months old. This baby food is said to contain yummy, premium, natural baby food with five veggies inside. It is free from added salt, added sugar, artificial colourings, artificial flavourings, preservatives, dairy and GM ingredients. The product can be microwaved and retails in a 170g pack.



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

Woolworths Select Roasted Mediterranean Wood Fired Pizza

Woolworths Select Roasted Mediterranean Wood Fired Pizza is described as an authentic Italian wood fired pizza made with hand stretched dough, mozzarella cheese, capsicum, onion and zucchini, stone baked in a wood fired oven with simple flavours and finest ingredients. It is said to be inspired by the Italian pizzeria tradition of 24 hour natural rising, hand stretched dough and wood fired oven baking. It cooks in just 14 minutes and is free from artificial colours and flavours.



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





Eggplant.

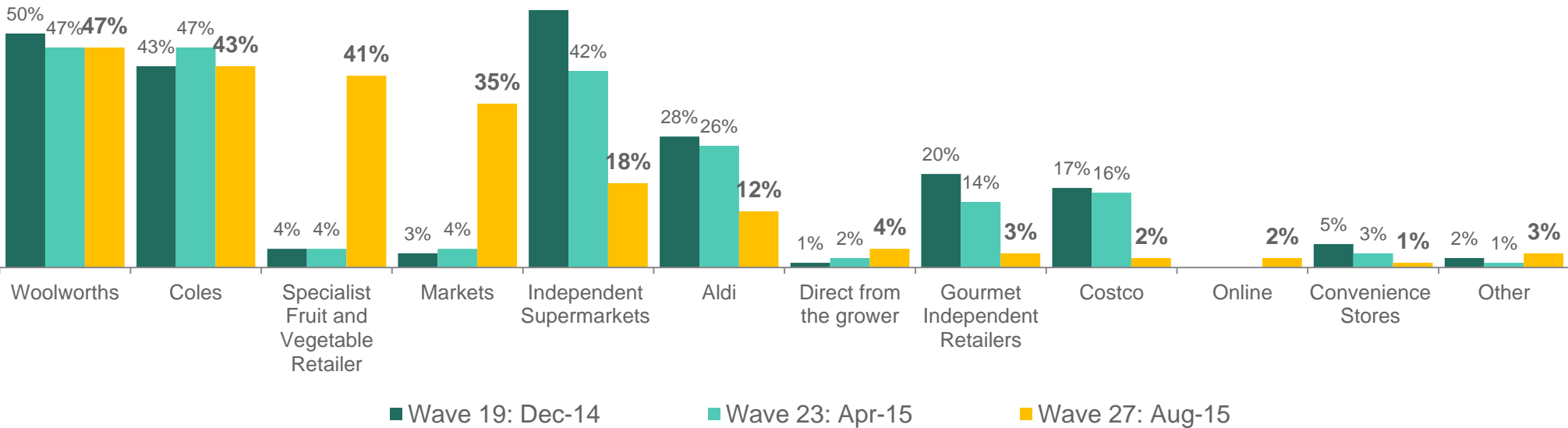


Whilst there is a declining trend in the average purchases per month, consumption has increased this wave.

Eggplant is primarily purchased through mainstream retailers. There has been a sharp increase in specialist fruit and vegetable retailers and markets, and substantial declines in independent supermarkets and Aldi as purchase channels.



Purchase Channels



Q1. On average, how often do you purchase <commodity>?
 Q2. On average, how often do you consume <commodity>?
 Q5. From which of the following channels do you typically purchase <commodity>?
 Sample Wave 19 N=304, Wave 23 N=303 and Wave 27 N=204



Average Spend and Price Sensitivity



Average weight of purchase

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

- 900g, Wave 19
- 900g, Wave 23



Recalled last spend

Recalled last spend on eggplant purchase is **\$3.90**, declining from Wave 23.

- ▼ \$4.17, Wave 19
- ▼ \$4.48, Wave 23



Value for money

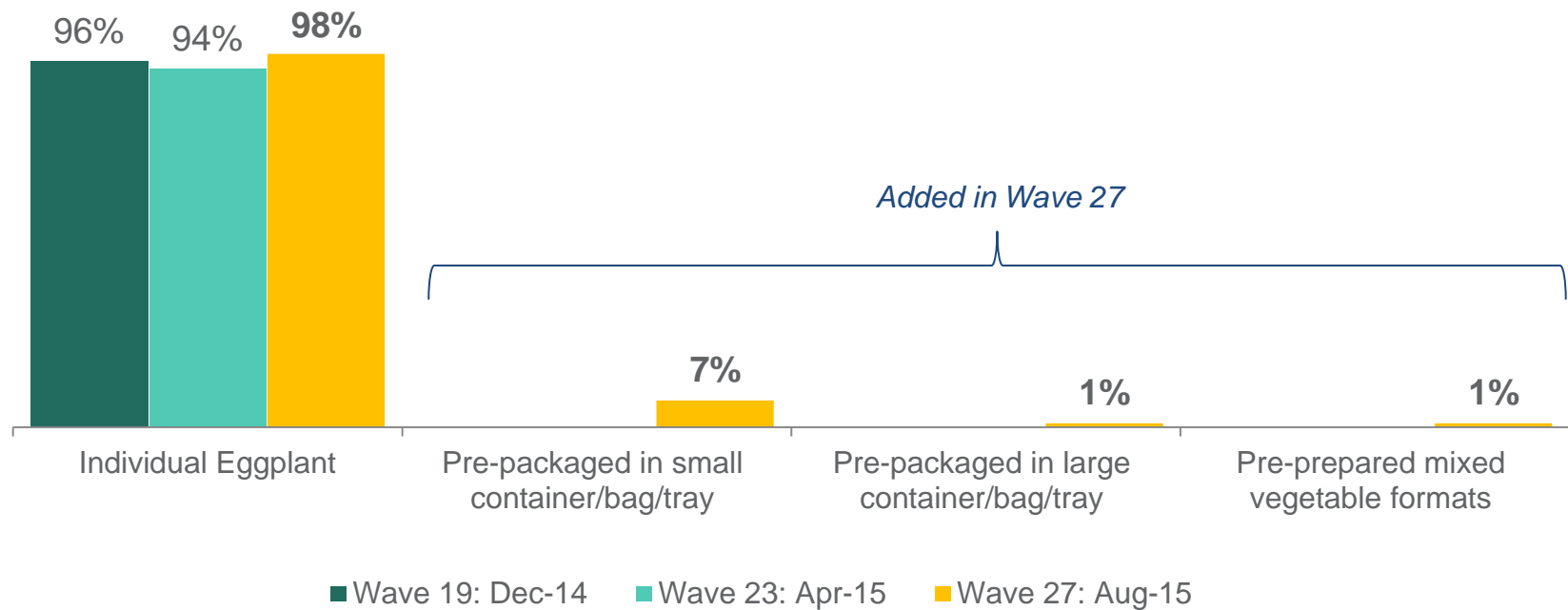
Overall consumers' perceived value for money is fair (**6.3/10**), which represents a slight increase upon previous waves.

- ▼ 6.1/10, Wave 19
- ▲ 6.1/10, Wave 23

Q3. How much <commodity> do you typically purchase when you shop for it?
 Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
 Q4. Please indicate how Poor to Good Value you think this product is? 0-10 scale
 Sample Wave 19 N=304, Wave 23 N=303 and Wave 27 N=204



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

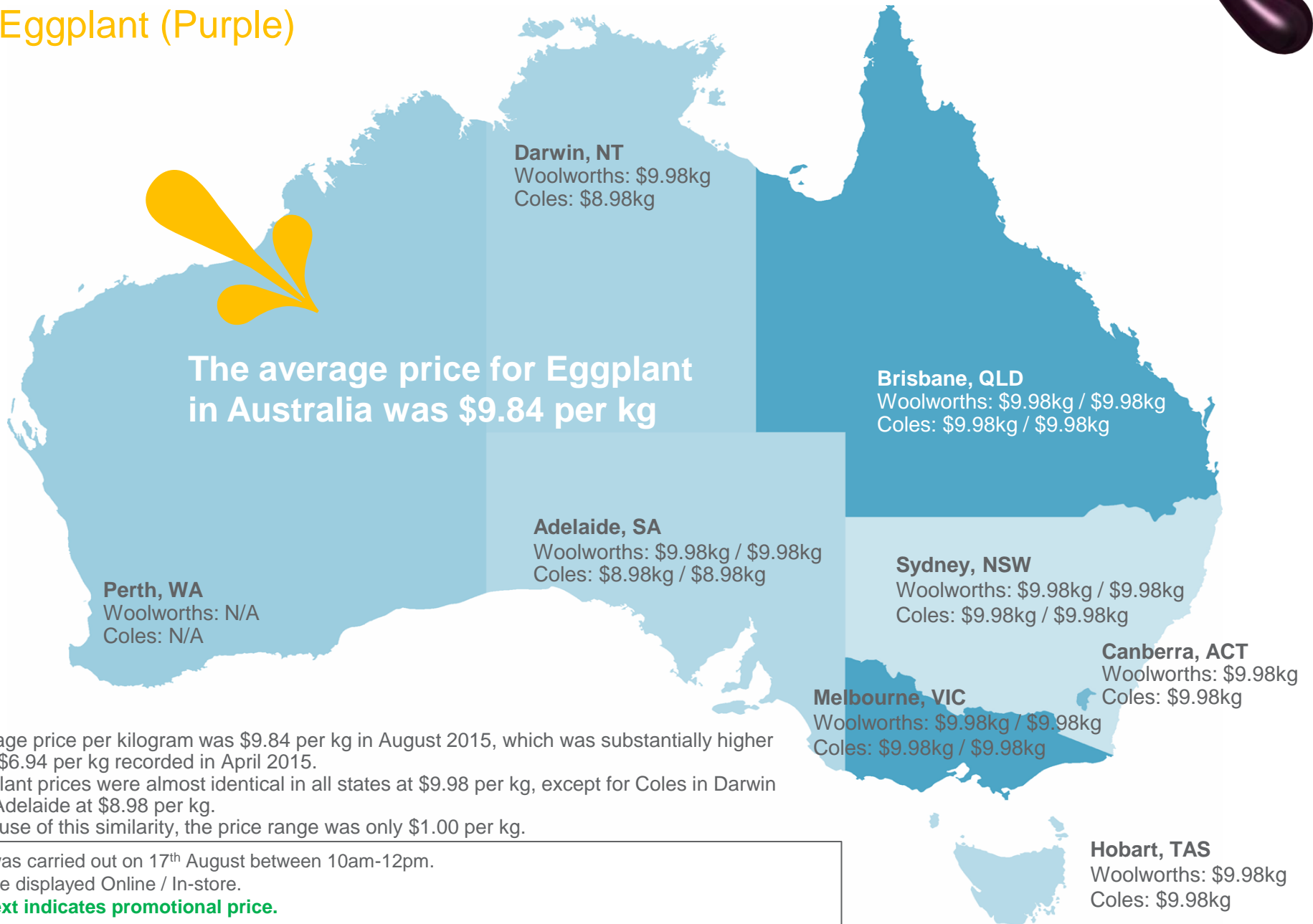


Q4b In what fresh formats do you typically purchase Eggplant?
Sample Wave 19 N=304, Wave 23 N=303 and Wave 27 N=204



Online and In-store Commodity Prices

Eggplant (Purple)



The average price for Eggplant in Australia was \$9.84 per kg

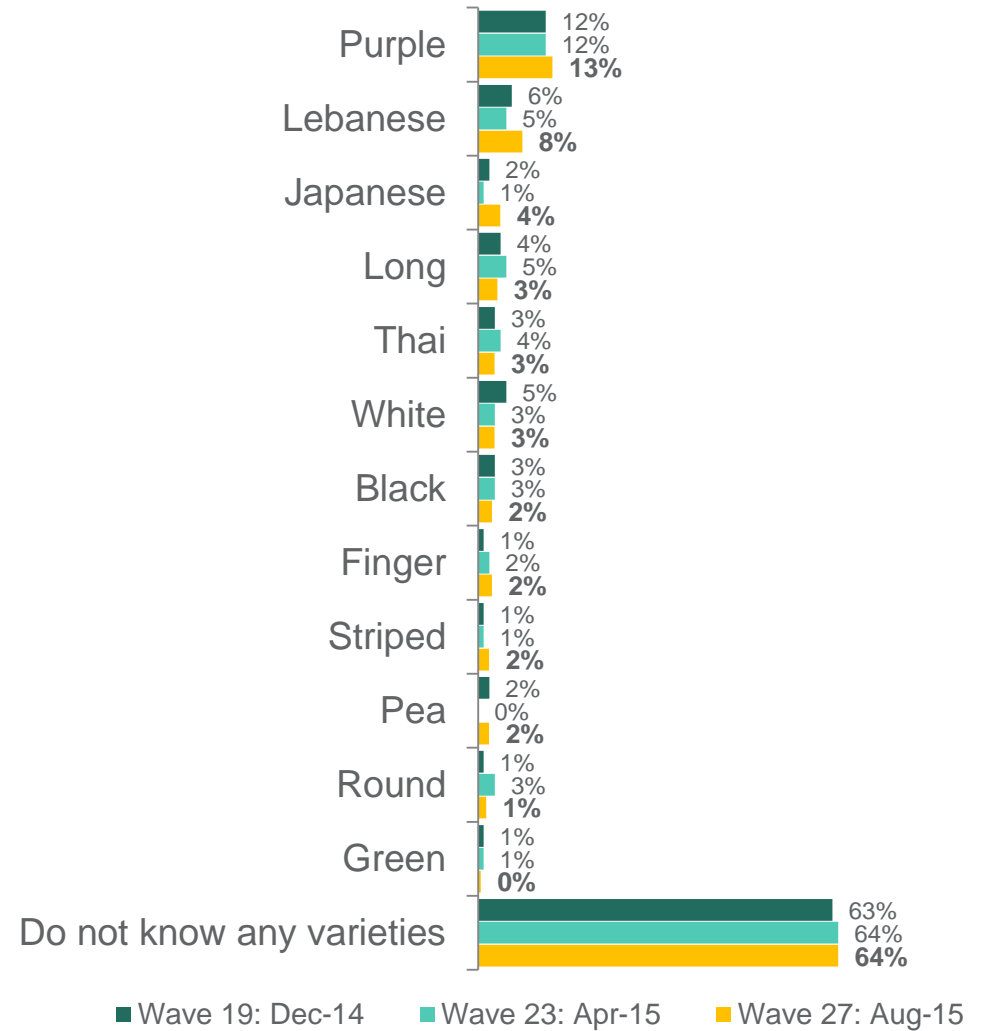
- Average price per kilogram was \$9.84 per kg in August 2015, which was substantially higher than \$6.94 per kg recorded in April 2015.
- Eggplant prices were almost identical in all states at \$9.98 per kg, except for Coles in Darwin and Adelaide at \$8.98 per kg.
- Because of this similarity, the price range was only \$1.00 per kg.

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



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

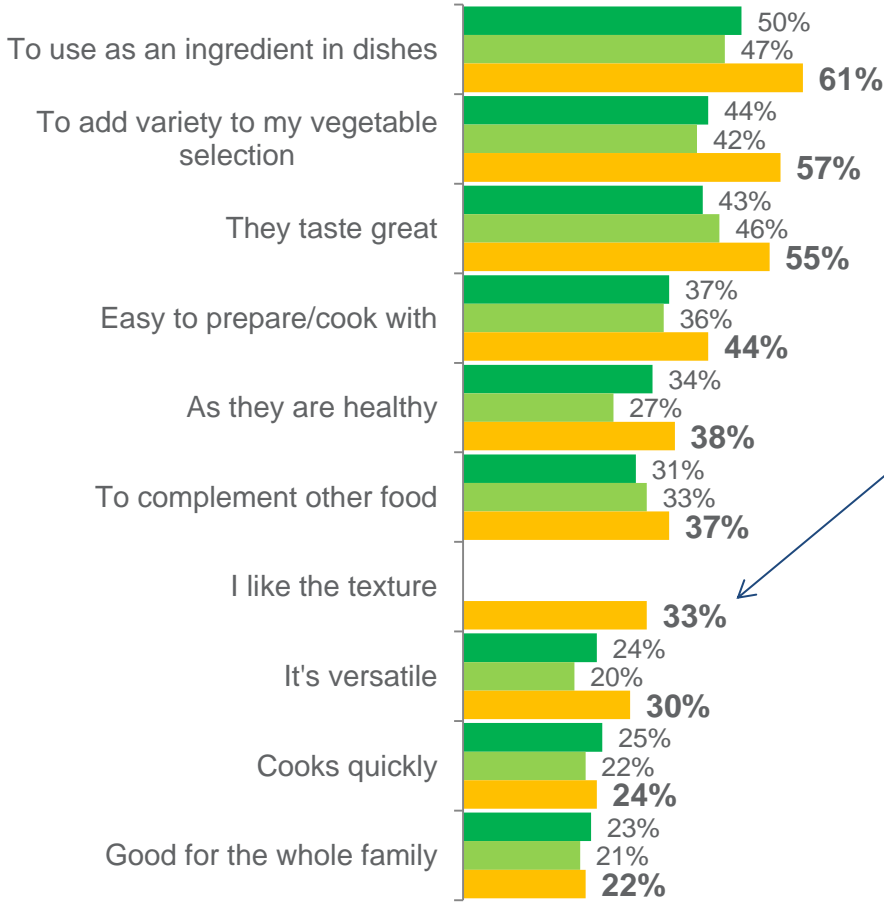
Consumers are prompted by colour and location for eggplant varieties.



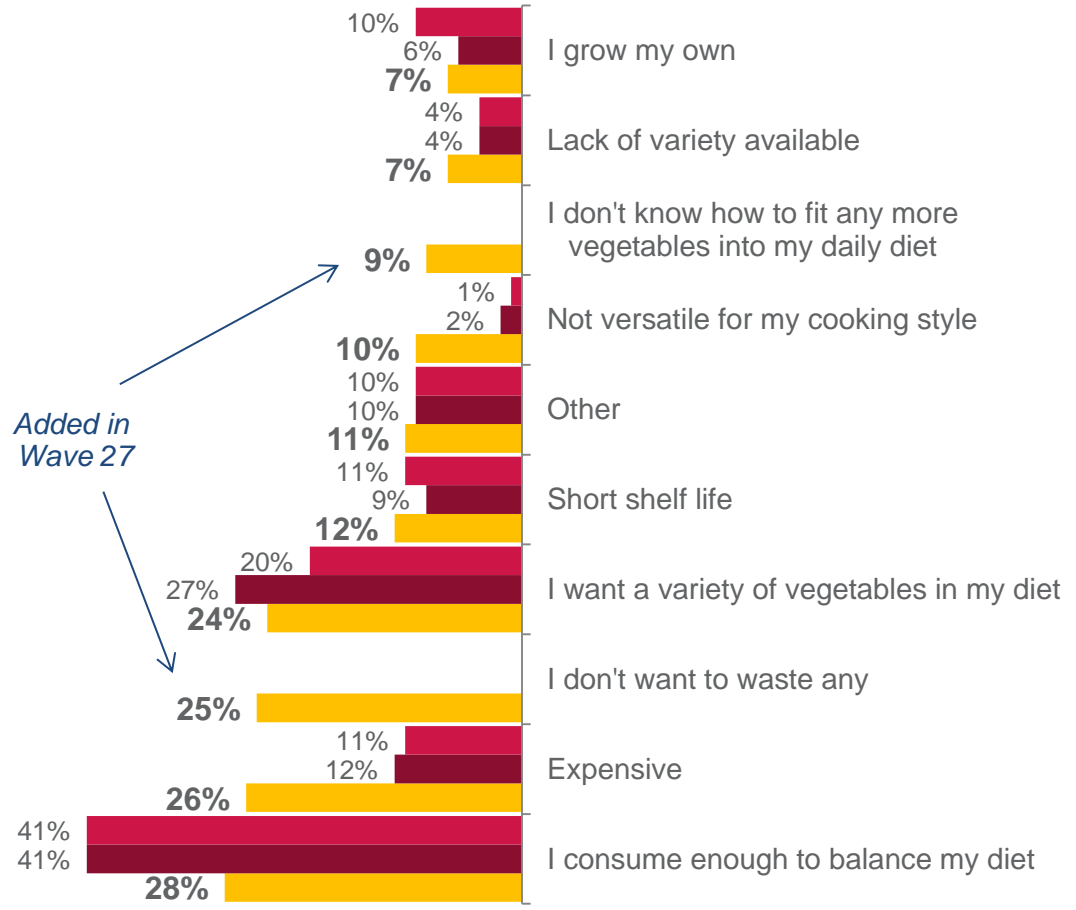


The key triggers to eggplant purchase are to use as an ingredient in dishes and adding variety to vegetable selection. Already consuming enough is the main barrier. Expense sharply rose as a purchase barrier due to the substantial increase in average prices this wave.

Triggers



Barriers



Added in Wave 27

■ Wave 19: Dec-14 ■ Wave 23: Apr-15 ■ Wave 27: Aug-15

■ Wave 19: Dec-14 ■ Wave 23: Apr-15 ■ Wave 27: Aug-15

Q7. Which of the following reasons best describes why you purchase <commodity> ?
Q8. Which reason best describes why you don't buy <commodity> more often?
Sample Wave 19 N=304, Wave 23 N=303 and Wave 27 N=204

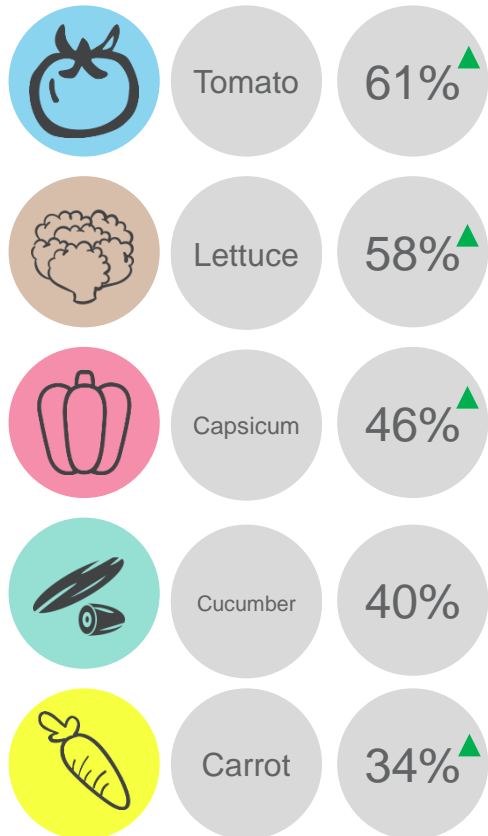


Eggplant is generally served with tomatoes, lettuce and capsicums, with all three rising since the previous wave.



Consumers prefer to grill, deep fry and bake eggplant, with deep frying seeing a sharp spike this wave.

Accompanying Vegetables



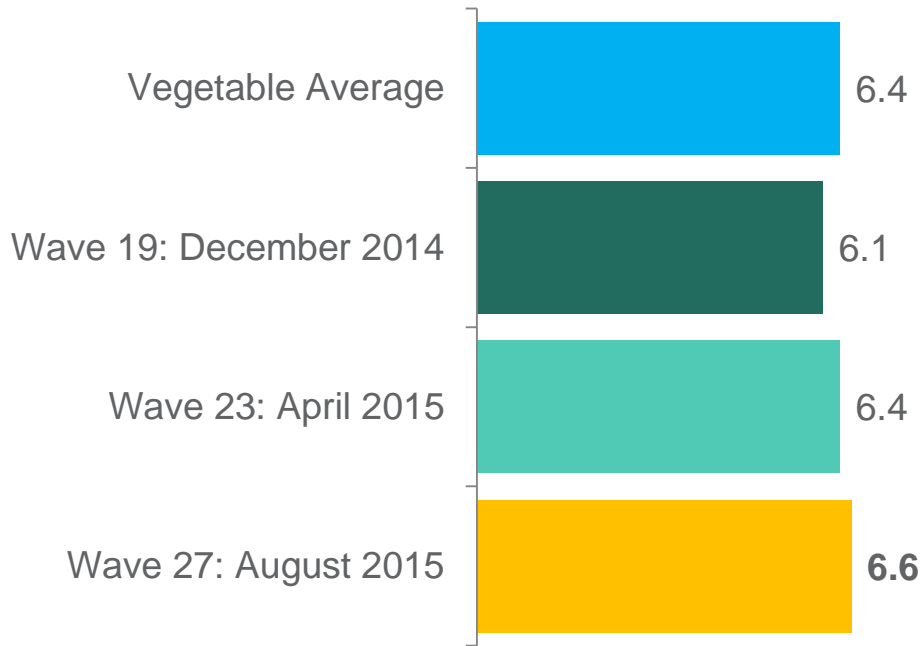
Top Cooking Styles

	Wave 19	Wave 23	Wave 27
Grilling	43%	37%	40%
Deep Frying	16%	13%	40%
Baking	29%	37%	39%
Roasting	36%	34%	38%
Stir frying	33%	27%	35%
Stewing (slowcooking)	21%	19%	27%
Sautéing	26%	20%	27%
Steaming	8%	7%	8%
Boiling	7%	9%	6%
Soup	8%	6%	6%

Q9. How do you typically cook <commodity> ?
 Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
 Sample Wave 19 N=304, Wave 23 N=303 and Wave 27 N=204



The importance of provenance has increased in Wave 27, which now sits above the Vegetable Average. Knowing that eggplants are grown in Australia is the most important provenance information for consumers.



Q14. When purchasing Eggplant, how important is Provenance to you?
Q15. And when purchasing Eggplant, how important is that it is grown in Australia?
Sample Wave 19 N=304, Wave 23 N=303 and Wave 27 N=204

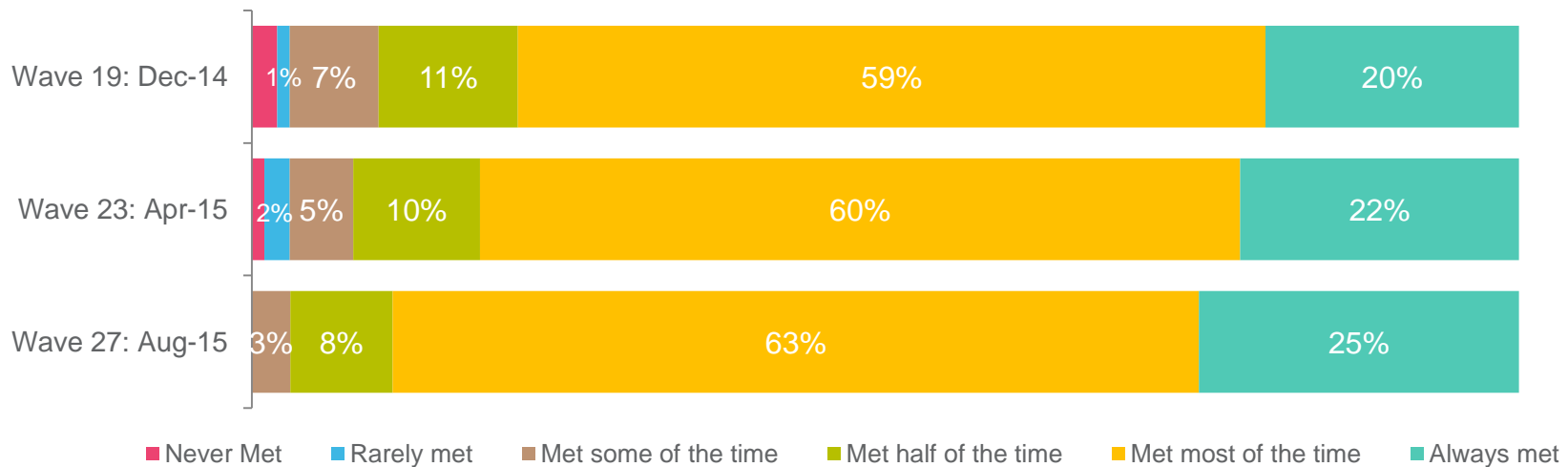


Consumers expect eggplant to remain fresh for just over one week once purchased, which has slowly declined over the past three waves. In contrast, the expectations of freshness has improved and is continually being met for the majority of consumers.

Expected to stay fresh for 7.7 days

- ▲ 8.6 days, Wave 19
- ▲ 7.9 days, Wave 23

Expectations Met



Q12. How long do you expect <commodity> to stay fresh for, once you have purchased it?
 Q13. How often is this length of freshness met when you buy <commodity> ?
 Sample Wave 19 N=304, Wave 23 N=303 and Wave 27 N=204



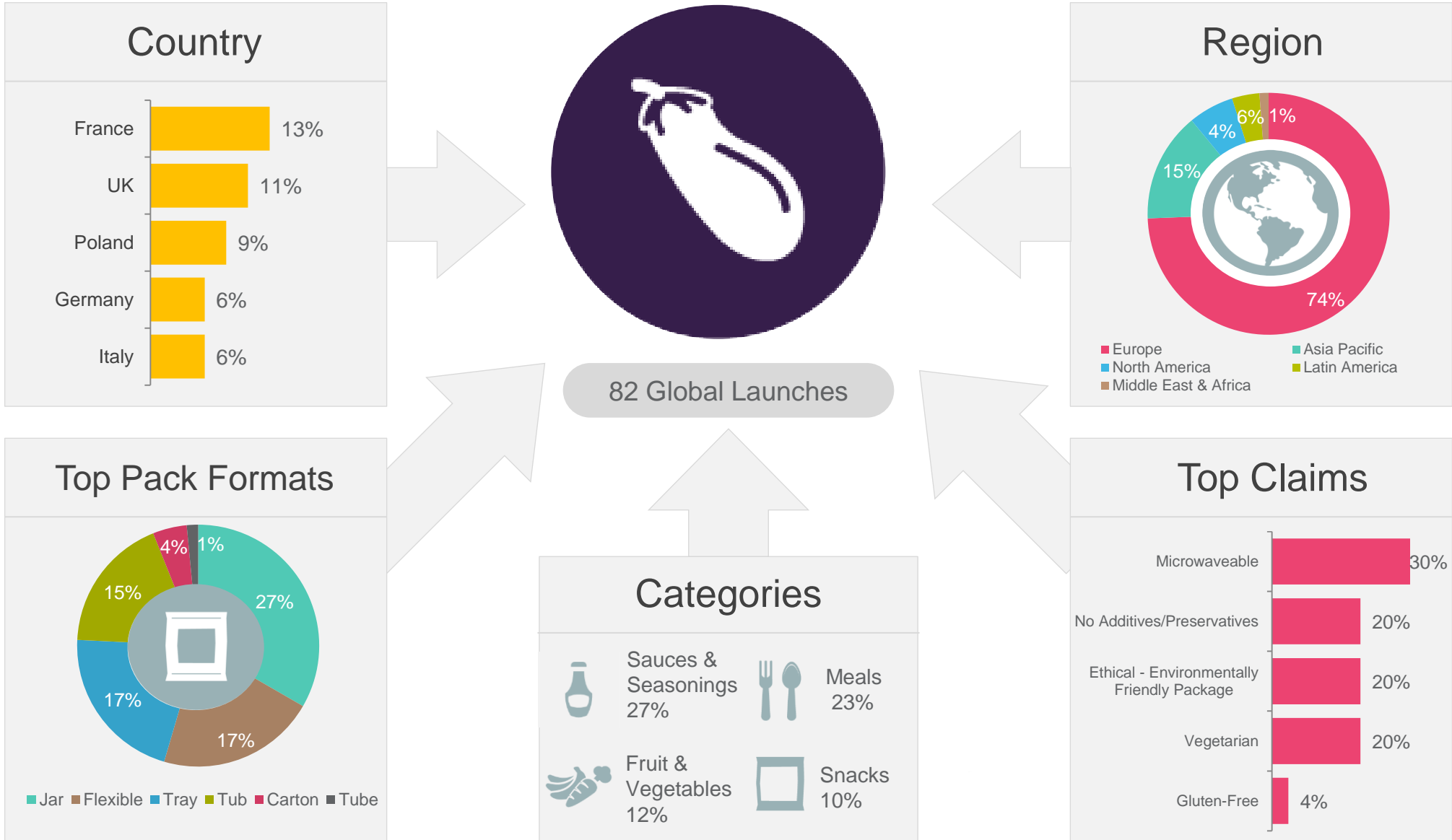
Trends: Eggplant



Eggplant Global Launches

August – October 2015

There were 82 products that contained Eggplant as an ingredient launched globally over the last three months. The majority of those launches occurred in Europe. Products ranged from sauces, meals and fruit & vegetables.





Eggplant Product Launches: Last 3 Months (August – October 2015) Summary

- There were 82 eggplant products launched globally in the last three months.
- There were two products launched in Australia, a soup and a salad.
- The majority of eggplant launches occurred in Europe (74%) and Asia Pacific (15%).
- Categories for launches were sauces and seasonings (27%) meals (23%), and fruit & vegetables (12%).
- Key claims used on products were around convenience, being microwavable (30%). No additives/preservatives and environmentally friendly packaging were also popular claims (both 20%). These trends were consistent with past months.
- A variety of packaging formats were used including jars (27%), flexible packaging (17%) and trays (17%).
- The most innovative launch was an eggplant flour from Brazil (other examples can be found in the following pages).



Source: Mintel (2015)

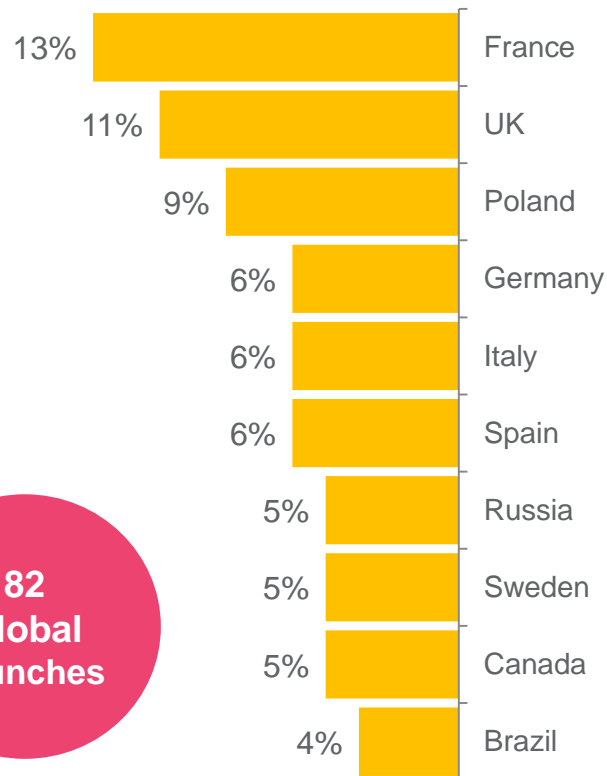




Eggplant Launches

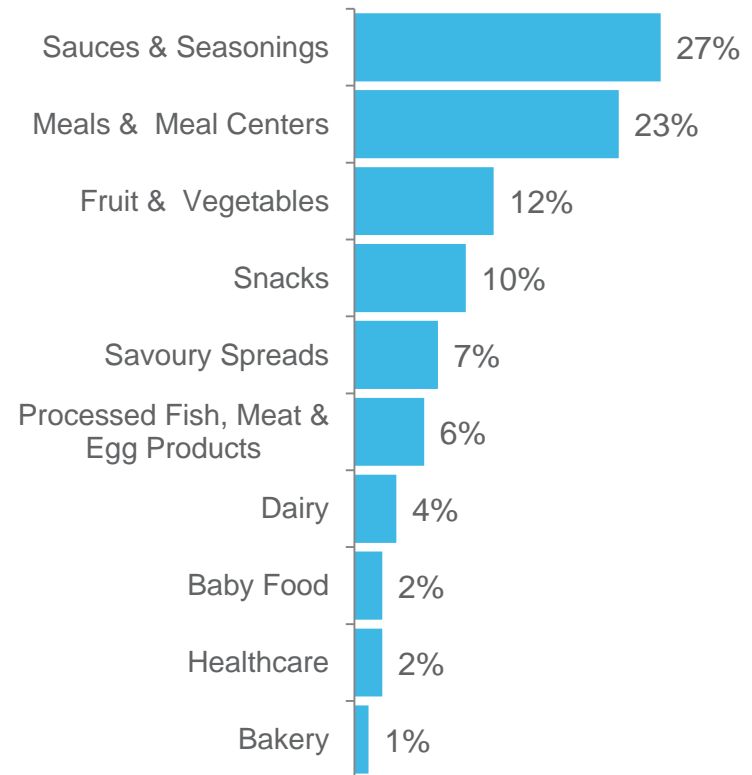
- Countries with the greatest number of launches were France, UK and Poland.
- Products launches were primarily sauces, meals, fruit & vegetables and snacks.

Top Launch Countries



82
Global
Launches

Top Launch Categories





Jars, flexible and tray packaging formats were most commonly used for launch products this wave. Microwaveable, no additives/preservatives and environmentally friendly packaging were the key claims used.

Pack Formats Used

Global		Jar	27%
		Flexible	17%
		Tray	17%
Europe		Jar	31%
		Flexible	20%
		Tray	20%

Top Claims Used

Global		Microwaveable	30%
		No Additives/Preservatives	20%
		Ethical - Environmentally Friendly Package	20%
Europe		Microwaveable	28%
		Ethical - Environmentally Friendly Package	26%
		Vegetarian	20%

»»» Innovative Eggplant Launches: L3M (August – October 2015)

Waitrose Summer Eating Tanga Aubergine and Feta Pâté (UK)

Waitrose Summer Eating Tanga Aubergine and Feta Pâté has been relaunched for summer 2015. It is made with full fat soft cheese, chargrilled aubergines, feta cheese pâté, pumpkin seeds and mint and then topped with pink peppercorns. The vegetarian product retails in a 100g pack.



Claims:
Seasonal, Vegetarian

Oliviers & Co. Aubergine Caviar (France)

Oliviers & Co. Caviar d'Aubergine (Aubergine Caviar) is now available. The product retails in a 140g jar.



Claims:
N/A

Trader Joe's Grecian Style Eggplant with Tomatoes & Onions (USA)

Trader Joe's Grecian Style Eggplant with Tomatoes & Onions is now available. It is said to be a delectable Mediterranean dish of eggplant, tomatoes and onions, with eggplants harvested at the height of their season. It can be served cold, at room temperature or heated. The vegan product retails in a 9.9-oz. pack.



Claims:
Vegan, No Animal Ingredients

Samar Naturais Eggplant Flour (Brazil)

Samar Naturais Farinha de Berinjela (Eggplant Flour) is now available. The product is free from gluten and retails in a 100g recyclable pack.



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

➤➤➤ Innovative Eggplant Launches: L3M (August – October 2015)

Italiamo Parmesan Pizza (Slovakia)

Italiamo Pizza s Paradajkovou Omackou (Parmesan Pizza) is topped with tomato sauce, mozzarella cheese, grilled aubergine, pieces of tomatoes and hard cheese. The product has been cooked in a wood fired oven and is retailed in a 405g pack.



Claims:
N/A

Italiamo Grilled Aubergine Slices with Tomato (Italy)

Italiamo Gegrillte Auberginenscheiben mit Tomatenzubereitung (Grilled Aubergine Slices with Tomato) are now available. The microwaveable product retails in a 450g pack.



Claims:
Microwaveable

Paker Grilled Eggplant (Iran)

Paker Grilled Eggplant is halal certified and said to be fresh and 100% pure. The cholesterol free eggplant is said to be hygienically packed using the best equipment. The microwavable product retails in a 350g pack.



Claims:
Halal, Low/No/Reduced Cholesterol, Microwaveable

Gourmano 365 Days Organic Ratatouille (Germany)

Gourmano 365 Days Bio Ratatouille (Organic Ratatouille) comprises tomatoes, courgettes, aubergines, onions, red and green peppers. The microwaveable product is free from gluten, additives, pesticides, genetic modification and flavours. It is suitable for vegans, cut and deep frozen, and retails in a 500g pack, bearing the Bio and EU Green Leaf logos.



Claims:
No Additives/Preservatives, Low/No/Reduced Allergen, GMO-Free, Gluten-Free, Vegan, Ethical - Environmentally Friendly Product, Microwaveable, Organic, No Animal Ingredients

»»» Innovative Eggplant Launches: L3M (August – October 2015)

Coop & Go Grilled Vegetables (Italy)

Coop & Go Verdure alla Griglia (Grilled Vegetables) are now available. The product is described as a gastronomic preparation consisting of grilled vegetables, and retails in a 150g pack.



Claims:
On-the-Go

Istoriya No. 17 Eggplant Paste (Russia)

Istoriya 17 Ikra iz Baklazhanov (No. 17 Eggplant Paste) has a traditional flavour and contains vitamins and minerals. This GMO-free product retails in a 450g jar.



Claims:
GMO-Free

Tokiwa Yakuin Noevir Group Beaupower Açai Flavour Placenta & Collagen (Japan)

Tokiwa Yakuin Noevir Group Beaupower Açai Flavour Placenta & Collagen is made with 75 types of fermented plant extracts, 15,000mg placenta, 10,000mg collagen and isoflavone. The caffeine-free product is recommended for those who are beauty conscious. It has 50% grape and raspberry fruit juice, and retails in a 70g pack with 7 x 10g units.



Claims:
Botanical/Herbal, Beauty Benefits, Caffeine Free

Garant Spanish Mojo Rojo Sauce (Sweden)

Garant Spansk Mojo Rojo (Spanish Mojo Rojo Sauce) is a spicy sauce that tastes fantastic with barbecued food. The product retails in a 210ml pack.



Claims:
N/A



Australian Launch: L3M (August – October 2015)

Heinz Beanz Creationz Mediterranean Style Beanz

Heinz Beanz Creationz Mediterranean Style Beanz contain no added flavours, colours or preservatives. This microwavable product is 98% fat free, rich in protein and an excellent source of dietary fibre. The product retails in a 420g recyclable pack with an on-pack recipe suggestion and carries an Australian Health Star rating of 5/5 stars.



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

Local Hand Made Haloumi & Mushroom Frittata Salad

Local Hand Made Haloumi & Mushroom Frittata Salad has been repackaged. The product now retails in a new 350g recyclable, reusable pack.



Claims:
Ethical - Environmentally Friendly Package



Spring Onion.





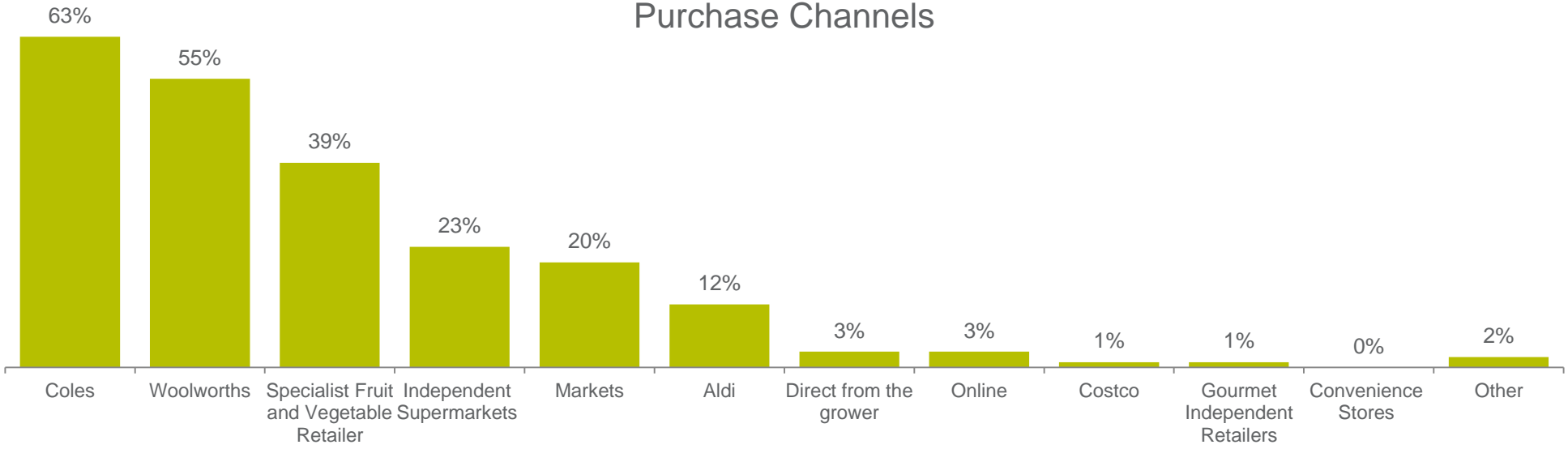
On average, spring onions are purchased three times a month, and are consumed 7 to 8 times per month.

Spring onions are generally purchased from mainstream retailers such as Woolworths and Coles. Specialist fruit and vegetable retailers are also a popular purchase channel.

Average Purchase 2.8 times per month

Average Consumption 7.6 times per month

Purchase Channels



Wave 27: Aug-15

Q1. On average, how often do you purchase Spring Onion?
Q2. On average, how often do you consume Spring Onion?
Q5. From which of the following channels do you typically purchase Spring Onion?
Sample Wave 27 N=203



Average Spend and Price Sensitivity



Average weight of purchase

The average consumer typically purchases **400g** of spring onions.



Recalled last spend

Recalled last spend on spring onions was **\$2.40**.



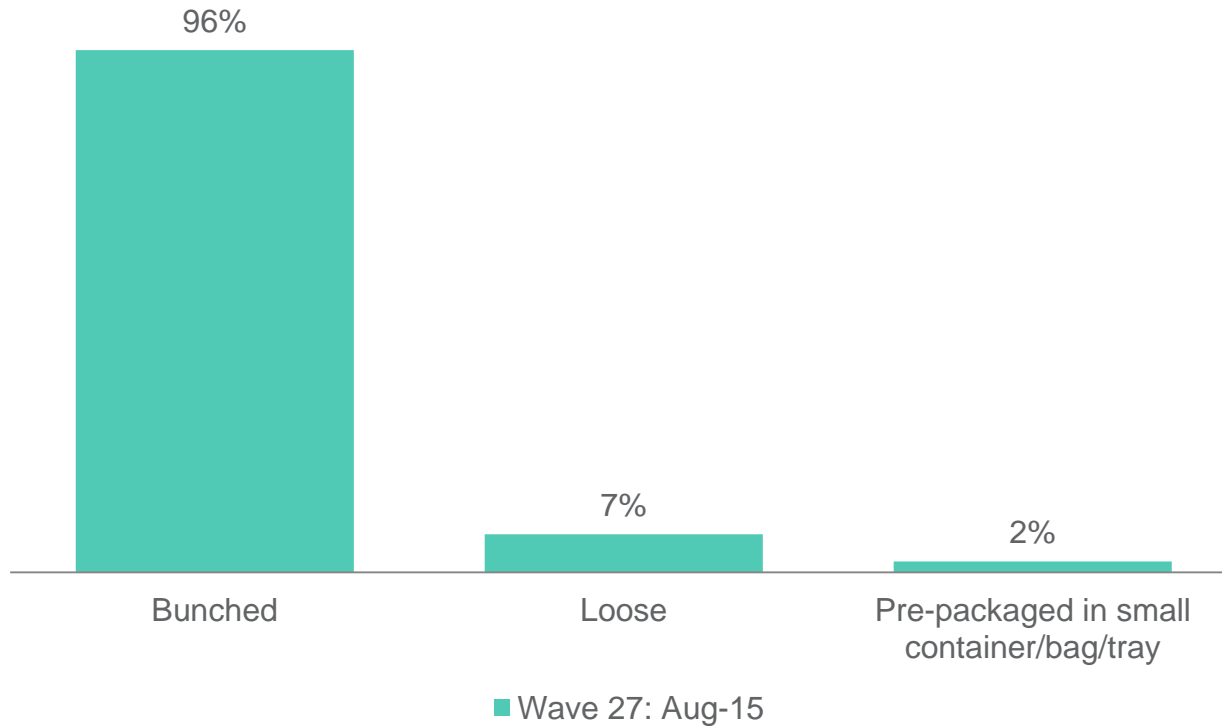
Value for money

Consumers' perceived value for money is fair for spring onions (**6.2/10**).

Q3. How much Spring Onion 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 27 N=203



Bunched spring onions are the most common purchase format, this may be due to the lack of other format options available in stores.

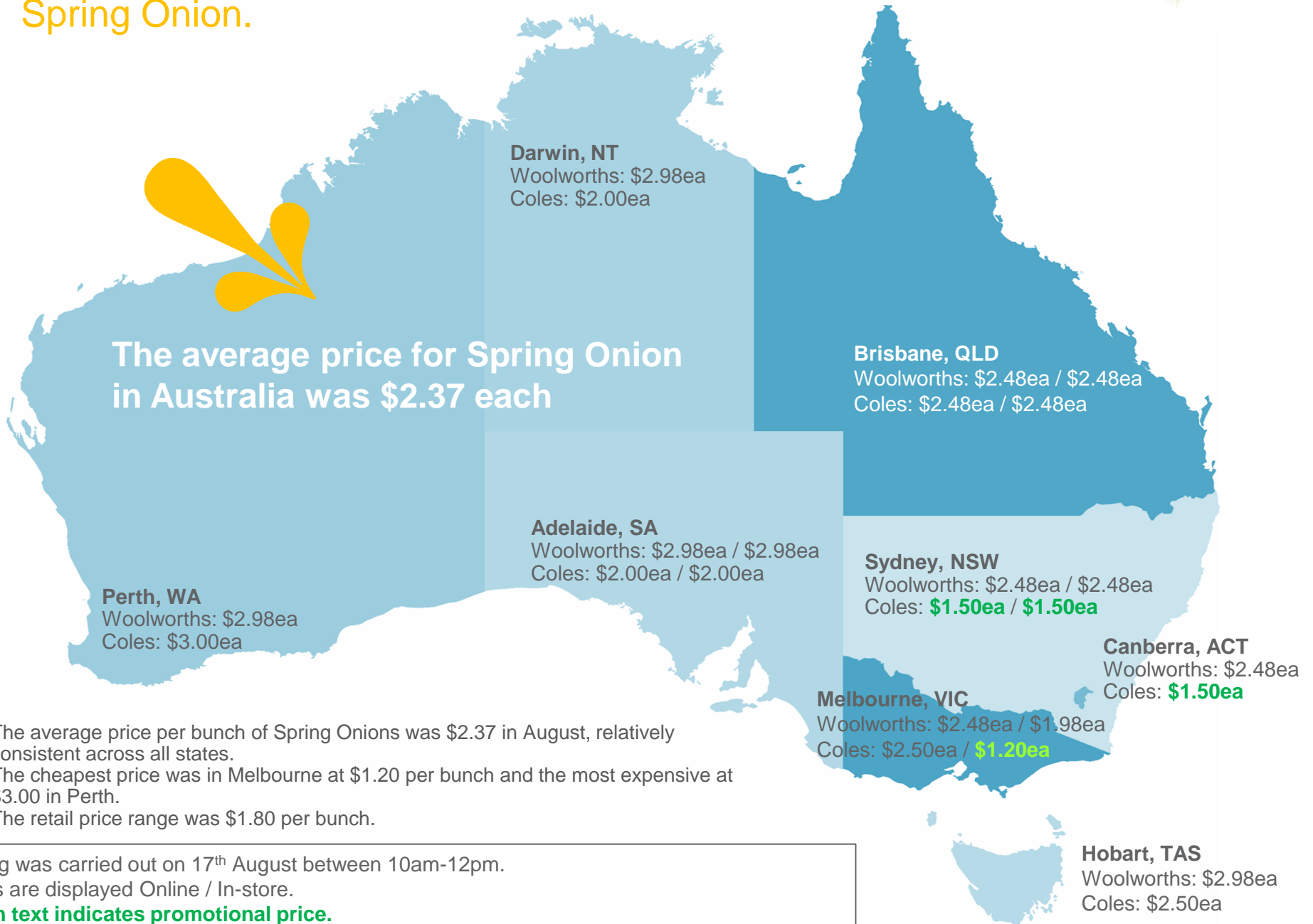


Q4b In what fresh formats do you typically purchase Spring Onion?
Sample Wave 27 N=203



Online and In-store Commodity Prices.

Spring Onion.



- The average price per bunch of Spring Onions was \$2.37 in August, relatively consistent across all states.
- The cheapest price was in Melbourne at \$1.20 per bunch and the most expensive at \$3.00 in Perth.
- The retail price range was \$1.80 per bunch.

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



Awareness of spring onion varieties is low, with 85% of consumers unable to recall a type.

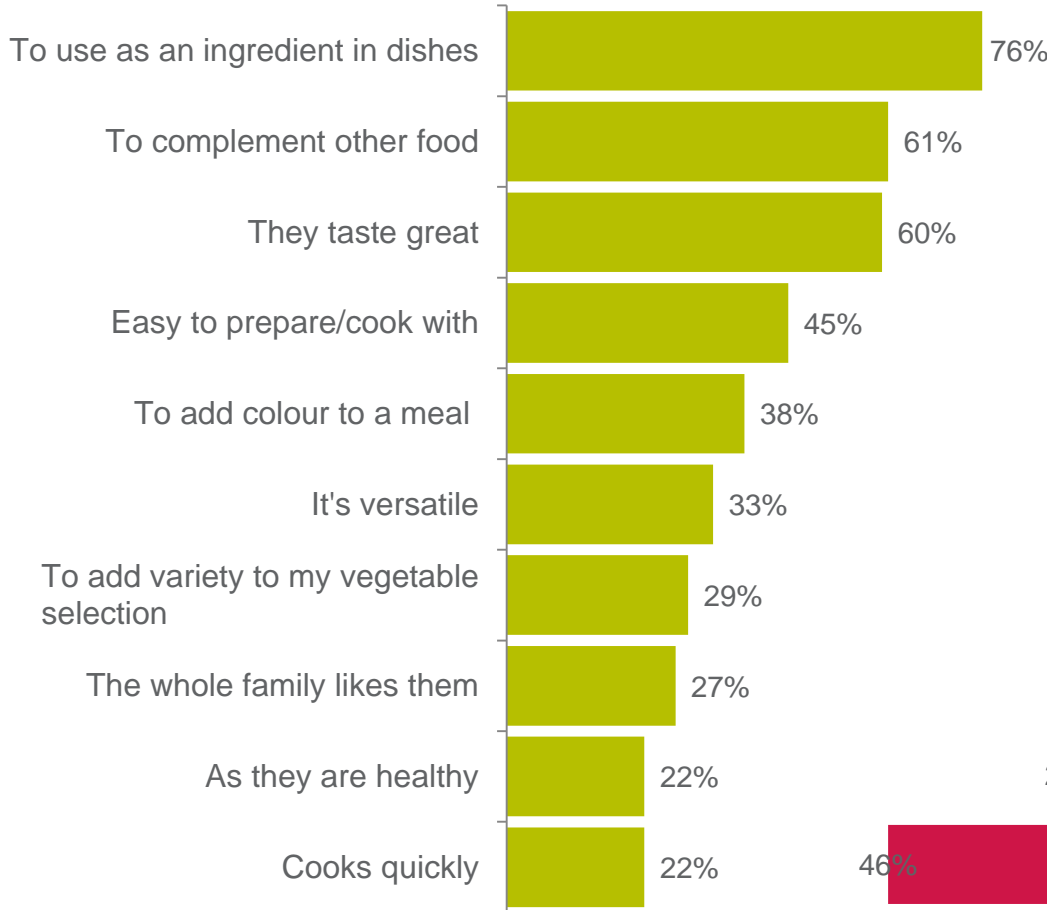




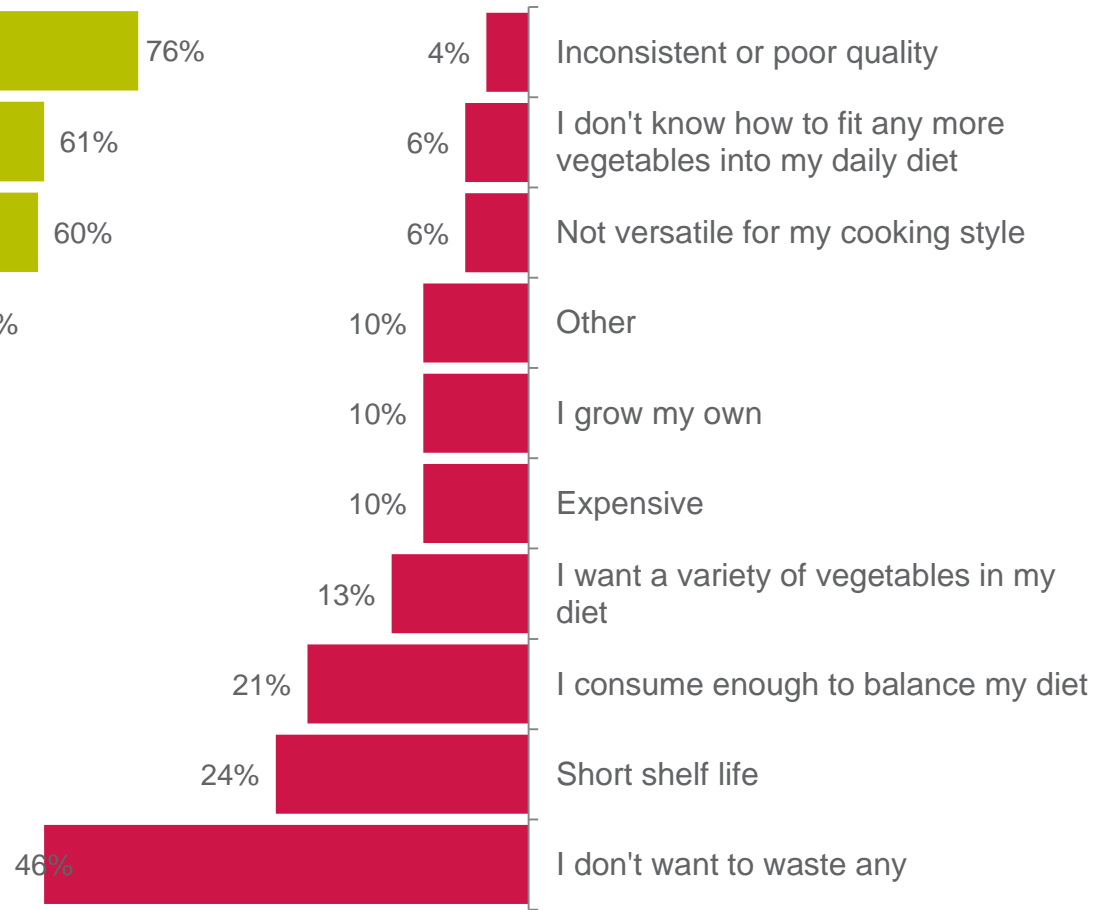
Using spring onion as an ingredient in dishes, complementing other foods and tasting great are the key drivers of purchase. In contrast, the key barriers are not wanting to waste any, short shelf life and already consuming enough to balance their diet.



Triggers



Barriers



Q7. Which of the following reasons best describes why you purchase Spring Onion?
 Q8. Which reason best describes why you don't buy Spring Onion more often?
 Sample Wave 27 N=203



Asian and Australian cuisine are most popular for spring onion dishes.

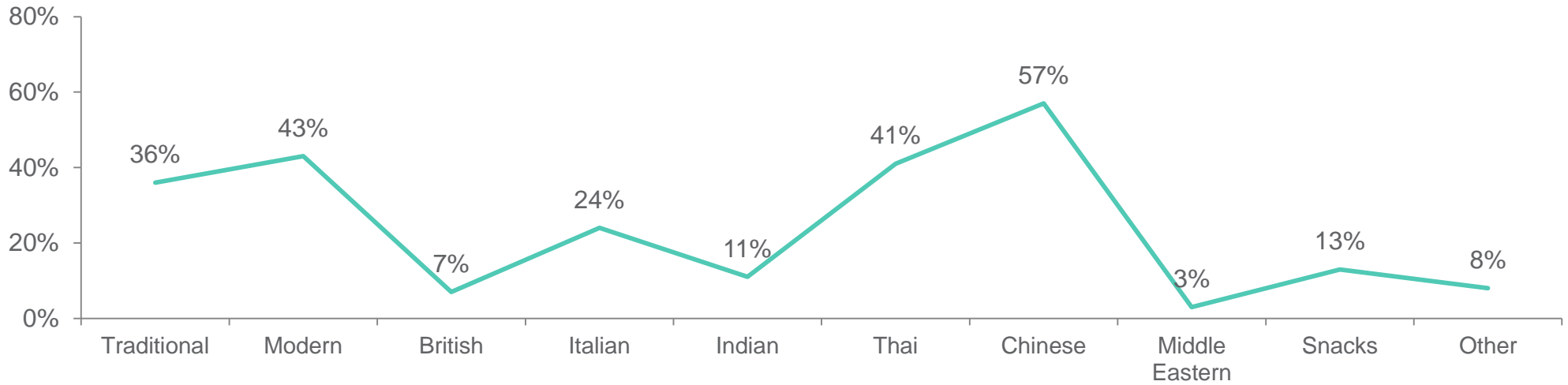
Meal occasions tend to occur during dinner and family meals.

Top 5 Consumption Occasions



Dinner	67%
Family Meals	61%
Quick Meals	53%
Weekday Meals	42%
Weekend Meals	41%

Typical Cuisine Cooked



— Wave 27: Aug-15

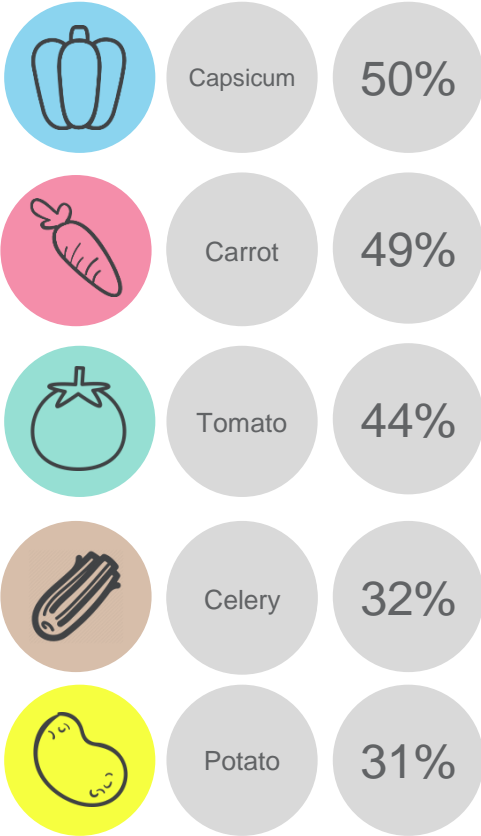


Q10. What cuisines do you cook/consume that use Spring Onion?
 Q11. Which of the following occasions do you typically consume/use Spring Onion?
 Sample Wave 27 N=203



Consumers prefer to serve spring onion with capsicum and carrots. Spring onions are generally cooked in stir fries or eaten raw.

Accompanying Vegetables



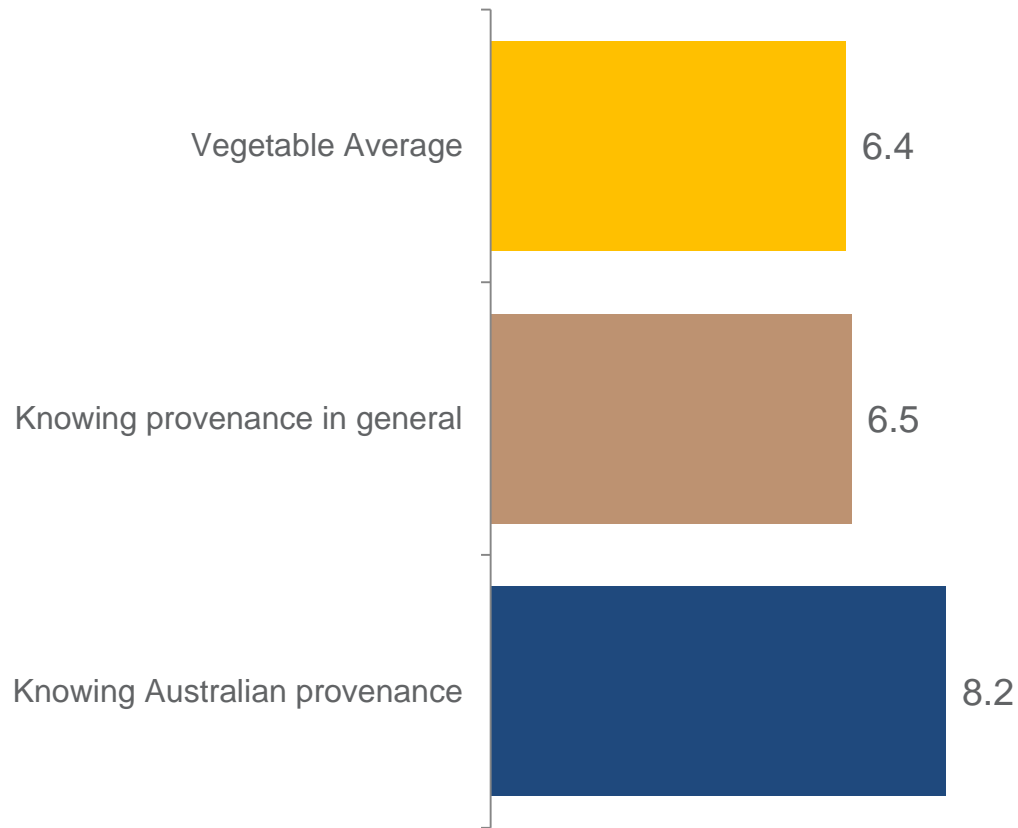
Top Cooking Styles

	Wave 27
Stir frying	72%
Raw	52%
Sautéing	33%
Soup	29%
Frying	28%
Slow cooking	10%
Baking	10%
Mashing	6%
Grilling	6%
Steaming	6%

Q9. How do you typically cook Spring Onion?
Q10a. And when are you serving Spring Onion which of the following do you also serve together with this?
Sample Wave 27 N=203



Knowing that spring onions are grown in Australia is the most important provenance information for consumers.



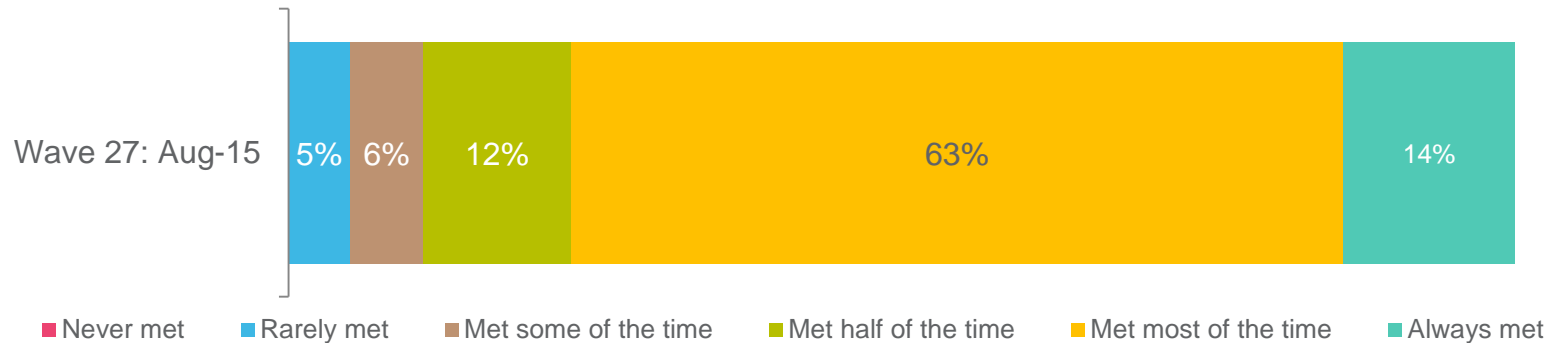
Q14. When purchasing Spring Onion, how important is Provenance to you?
Q15. And when purchasing Spring Onion, how important is that it is grown in Australia?
Sample Wave 27 N=203



Consumers expect spring onion to remain fresh for around 9 days once purchased, which is being met most of the time.

Expected to stay fresh for 9.1 days

Expectations Met



Q12. How long do you expect Spring Onion to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy Spring Onion?
Sample Wave 27 N=203

A photograph of several spring onions with white bulbs and green stalks, arranged on a dark, textured surface. A large, semi-transparent dark grey circle is overlaid in the center of the image, containing the title text.

Spring Onion Product Launch Trends.

Spring Onion Global Launches

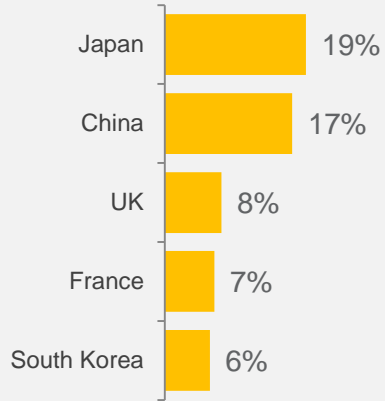
August – October 2015

There were 631 spring onion products launched globally over the last three months. The majority of launches were in Japan and China. Categories for launches were meals and snacks. Key packaging for spring onion products were tub formats.

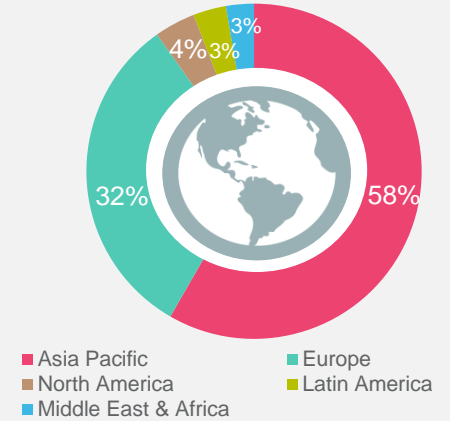


631 Global NPDs

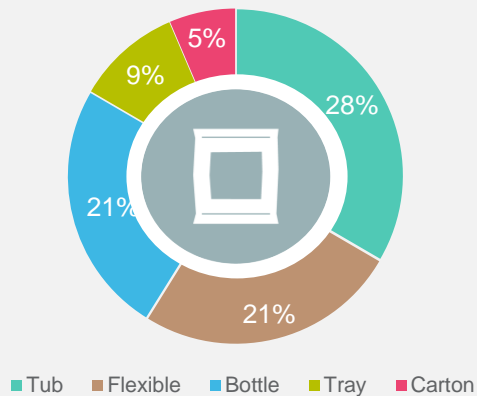
Country



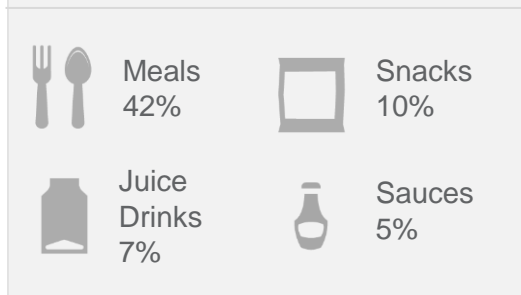
Region



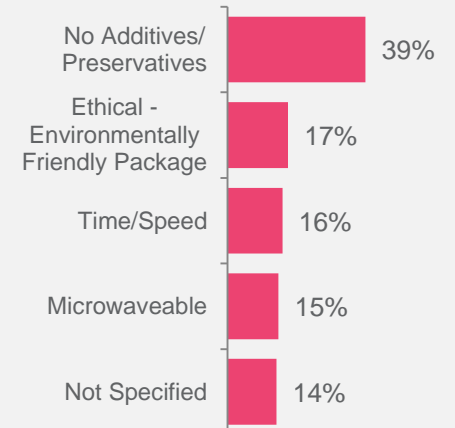
Top Pack Formats



Categories



Top Claims





Spring Onion Product Launches: Last 3 Months (August – October 2015) Summary

- There were 631 launches in the past 3 months globally that contained spring onions as an ingredient.
- There were 14 products launched in Australia over the past three months.
- Asia Pacific (58%) and Europe (32%) were the key regions for launches.
- Tubs (28%), flexible packaging (21%), and bottles (21%) were the most common format used for products.
- The main categories for launches were meals (42%), snacks (10%) and juice drinks (7%).
- Claims used on products included no additives/preservatives (39%), environmentally friendly packaging (17%), time/speed (16%) and microwaveable (15%).
- The most innovative product launched was the Garlic and Spring Onion Soy Spread from Brazil. Other examples can be found in the following pages.

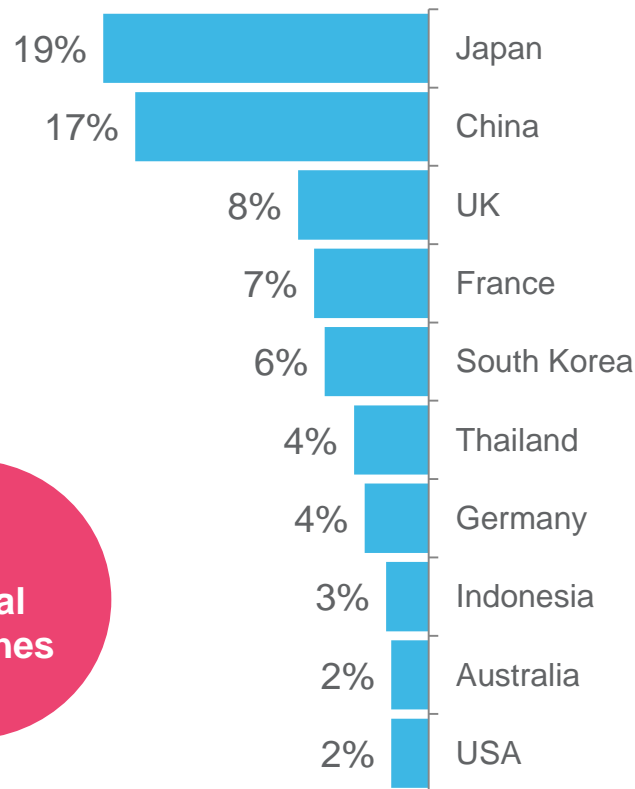


Source: Mintel (2015)

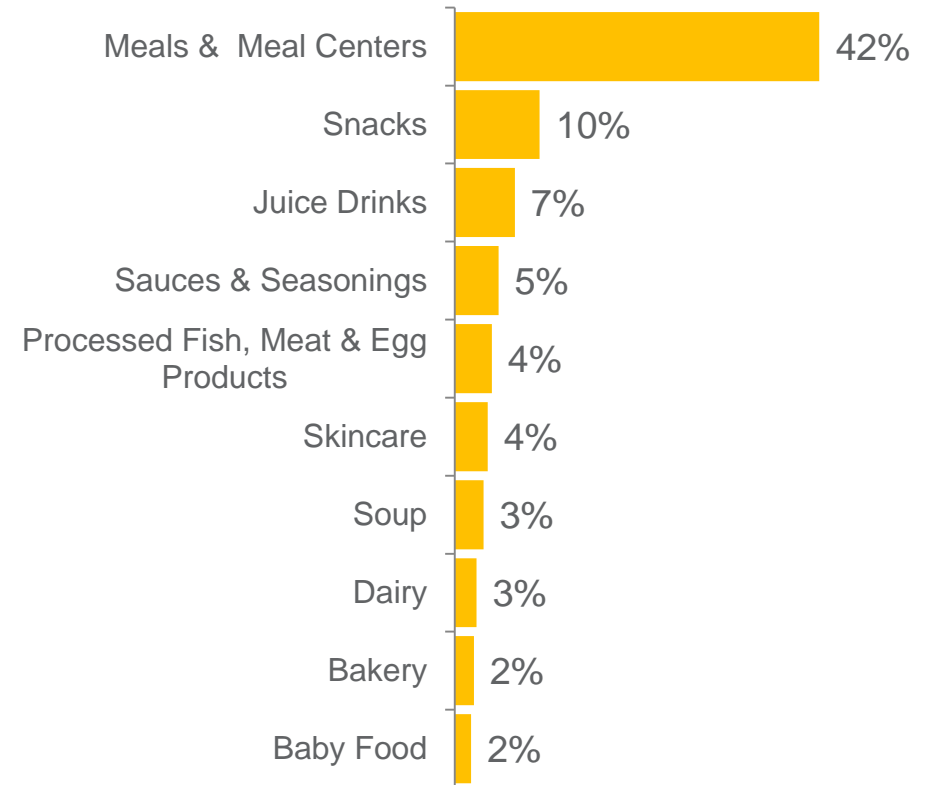


The majority of launches occurred in Japan and China. The key categories for spring onion launches are meals, snacks, juice drinks and sauces.

Top Launch Countries



Top Launch Categories












**631
Global
Launches**










➔ The main claim globally was no additives & preservatives, ethical – environmentally packaging, and time & speed.

Tubs, flexible packaging, and bottles are the main packaging formats for spring onion products.

Pack Formats Used

Global		Tub	28%
		Flexible	21%
		Bottle	21%
Asia Pacific		Tub	43%
		Flexible	30%
		Flexible Sachet	7%
Europe		Bottle	39%
		Carton	14%
		Tray	8%

Top Claims Used

Global		No Additives/Preservatives	39%
		Ethical - Environmentally Friendly Package	17%
		Time/Speed	16%
Asia Pacific		No Additives/Preservatives	42%
		Time/Speed	23%
		Microwaveable	18%
Europe		No Additives/Preservatives	39%
		Ethical - Environmentally Friendly Package	35%
		Low/No/Reduced Sugar	16%

Only regions with n >30 are displayed



Innovative Spring Onion Launches: L3M (August – October 2015)

Frostkrone Sunfood Asian Selection with Sweet Chilli Dip (Slovakia)

Frostkrone Sunfood Asian Selection (Asian Selection with Sweet Chilli Dip) comprises pre-fried Asian specialities with chicken-vegetable coated in a crunchy dough. The product retails in a 260g pack, containing 220g of Asian selection that features four 15g spring rolls with vegetables and chicken meat, four 14g pastries with vegetables, four 15.5g pastries with chicken meat and lemongrass, and three 14g wontons with vegetable and chicken meat, and a 40g sweet chilli sauce.



Claims:
N/A

Waitrose Asian Prawn Salad (UK)

Waitrose Asian Prawn Salad comprises prawn and mange tout salad with vegetable slaw, mixed grains and an Asian inspired soy and ginger dressing. The vibrant and succulent product retails in a 250g pack.



Claims:
N/A

Bofrost Cod Filet with Broccoli & Spinach (Greece)

Bofrost Fileta Psariou me Mprokolo-Spanaki (Cod Fillet with Broccoli & Spinach) comprises cod fillet with a topping made with spinach, broccoli and fresh cream. The MSC-certified product is free from colourings and flavour enhancers, can be ready in 40 minutes, and retails in an 800g pack.



Claims:
No Additives/Preservatives, Ethical - Environmentally Friendly Product

Mein Menü Frischer Genuss Cashew Chicken Wok Kit (Germany)

Mein Menü Frischer Genuss Hähnchen Cashew Wok (Cashew Chicken Wok Kit) is now available. The product cooks in eight minutes and retails in an FSC-certified 700g pack containing yellow rice, marinated chicken breast fillet, vegetables, a 100g sachet of oyster sauce and 20g cashew nuts in separate compartments.



Claims:
Ethical - Environmentally Friendly Package



Innovative Spring Onion Launches: L3M (August – October 2015)

M&S The Grill Fully Loaded Potato Salad (Ireland)

M&S The Grill Fully Loaded Potato Salad consists of Charlotte potatoes in a mayonnaise dressing with cheddar cheese, smoked bacon, spring onions, barbecue sauce and chives. This product is made with M&S assured pork from farms in the UK and retails in a 445g pack.



Claims:
N/A

Our Little Secret! Scrumptious Chicken & Mushroom Szechuan Rice (UK)

Our Little Secret! Scrumptious Chicken & Mushroom Szechuan Rice is said to be made using finest quality Basmati rice. This hot-spiced meal is ready in two minutes, provides 300 calories or preservatives. The microwaveable product retails in a 200g pack which provides one serving and features the Facebook and Twitter logos.



Claims:
No Additives/Preservatives, Social Media, Time/Speed, Microwaveable

FF Im-Oun Instant Yummy Rice Soup with Steamed Egg (Thailand)

FF Im-Oun Instant Yummy Rice Soup with Steamed Egg has been relaunched. Formerly marketed under the FF Fashion Food brand, this microwaveable product is ready in four to five minutes, is halal certified and retails in a 50g pack.



Claims:
Halal, Time/Speed, Microwaveable

CP Kurobuta Pork Steamed Egg in a Cup (Thailand)

CP Kurobuta Pork Steamed Egg in a Cup has been repackaged in a bigger sized pack but with the same price. This microwaveable product is sold only at 7-Eleven stores and retails in a 150g cup.



Claims:
Microwaveable



Innovative Spring Onion Launches: L3M (August – October 2015)

Zhongrenzhili Assorted Ji Xiang Walnut Cookies (China)

Zhongrenzhili Ji Xiang Tao Su Shi Jin Zhuang (Assorted Ji Xiang Walnut Cookies) comprise of 200g each of walnut, original, spring onion, and black sesame flavours.

This product retails in a 800g pack containing individually wrapped units.



Claims:
N/A

San Frediano Garlic and Spring Onion Soy Spread (Brazil)

San Frediano Pasta de Soja, Alho com Cebolinha (Garlic and Spring Onion Soy Spread) is now available. The gluten-free product is retailed in a 150g recyclable pack.



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

Nissin Cup Noodle Massaman Curry Noodle (Japan)

Nissin Cup Noodle Massaman Curry Noodle is inspired by southern Thai curry. It features smooth and supple noodle that has been deep fried 100% in vegetable oil and rich curry soup made with coconut milk and nine spices including coriander, star aniseed and red chili. It contains toppings of potato, steamed chicken, spring onion and carrot. The product is free from colourings and preservatives, and retails in an 80g pack.



Claims:
No Additives/Preservatives

The Ganpyeonhan Spring Onion Slice (South Korea)

The Ganpyeonhan Spring Onion Slice is now available. This domestic spring onion is said to be convenient to use as it is pre-cut and pre-washed. The product retails in a 100g pack.



Claims:
Ease of Use



Australian Spring Onion Launches: L3M (August – October 2015)

Woolworths Cooking with Kylie Kwong Prawn Dumplings with Ginger and Coriander Meal Kit

This quick and easy meal kit with step by step instructions provides enough to create 16 home-made dumplings. Made with responsibly sourced Australian seafood and containing no artificial colours or flavours, this product carries an Australian Health Star Rating of 3.5 stars and retails in a 400g recyclable pack.



Claims:
Ease of Use, No Additives/Preservatives,
Ethical - Environmentally Friendly Package,
Ethical - Environmentally Friendly Product,
Time/Speed

Westacre Manhattan Spring Onion Cream Cheese

Westacre Manhattan Spring Onion Cream Cheese is a blended cream cheese with spring onion and is coated in chives. This vegetarian product is free from gluten, artificial colourings and flavourings, and retails in a 200g pack.



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

Wai Wai Tom Yum Shrimp Flavour Instant Noodles

Wai Wai Tom Yum Shrimp Flavour Instant Noodles are now available with a newly designed pack. This oriental style product is available in a 60g pack.



Claims:
Time/Speed

Lean Cuisine Whole Grains Steam Mexican Chicken with Brown Rice & Quinoa

Lean Cuisine Whole Grains Steam Mexican Chicken with Brown Rice & Quinoa is a Mexican style chicken in red kidney bean salsa served with a combination of brown and white rice, sweet corn, capsicum and blended with the natural goodness of red quinoa. The microwavable product contains a source of iron, is high in protein and fibre, and is very high in whole grain nutrition. It provides 2.5 servings of vegetables and contains no artificial colours, flavours or preservatives.



Claims:
No Additives/Preservatives,
Low/No/Reduced Cholesterol, High/Added
Fibre, Ethical - Environmentally Friendly
Package, Low/No/Reduced Fat,
Microwaveable, Slimming, High Protein,
Social Media, Wholegrain



Radish.





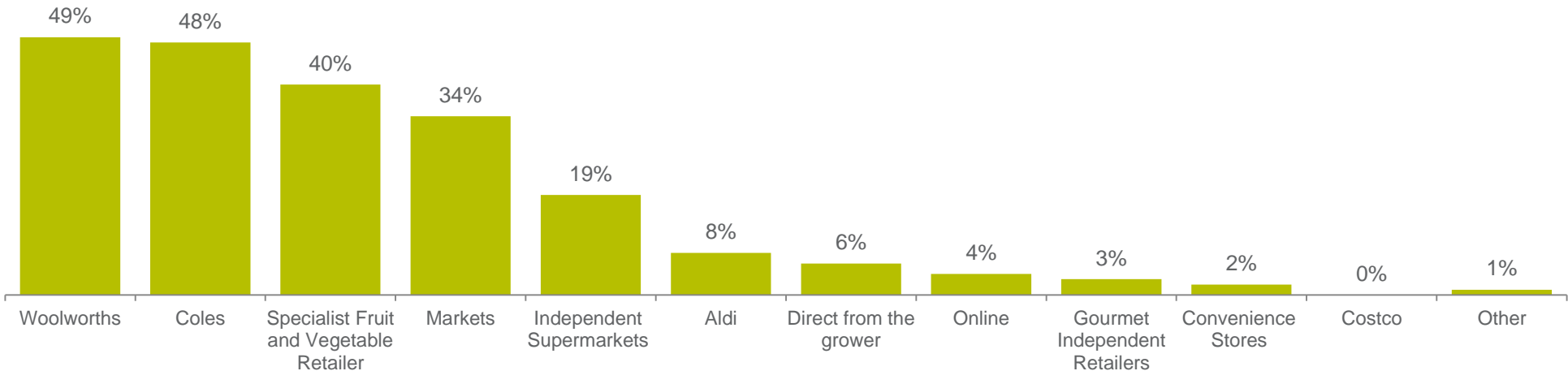
On average, radish is purchased around four times a month, and is consumed nine times per month.

Radish is generally purchased from mainstream retailers such as Woolworths and Coles. Specialist fruit and vegetable retailers, and markets are also popular purchase channels.

Average Purchase 3.9 times per month

Average Consumption 9.2 times per month

Purchase Channels



■ Wave 27: Aug-15

Q1. On average, how often do you purchase Radish?
Q2. On average, how often do you consume Radish?
Q5. From which of the following channels do you typically purchase Radish?
Sample Wave 27 N=203



Average Spend and Price Sensitivity



Average weight of purchase

The average consumer typically purchases **600g** of radish.



Recalled last spend

Recalled last spend on radish was **\$3.40**.



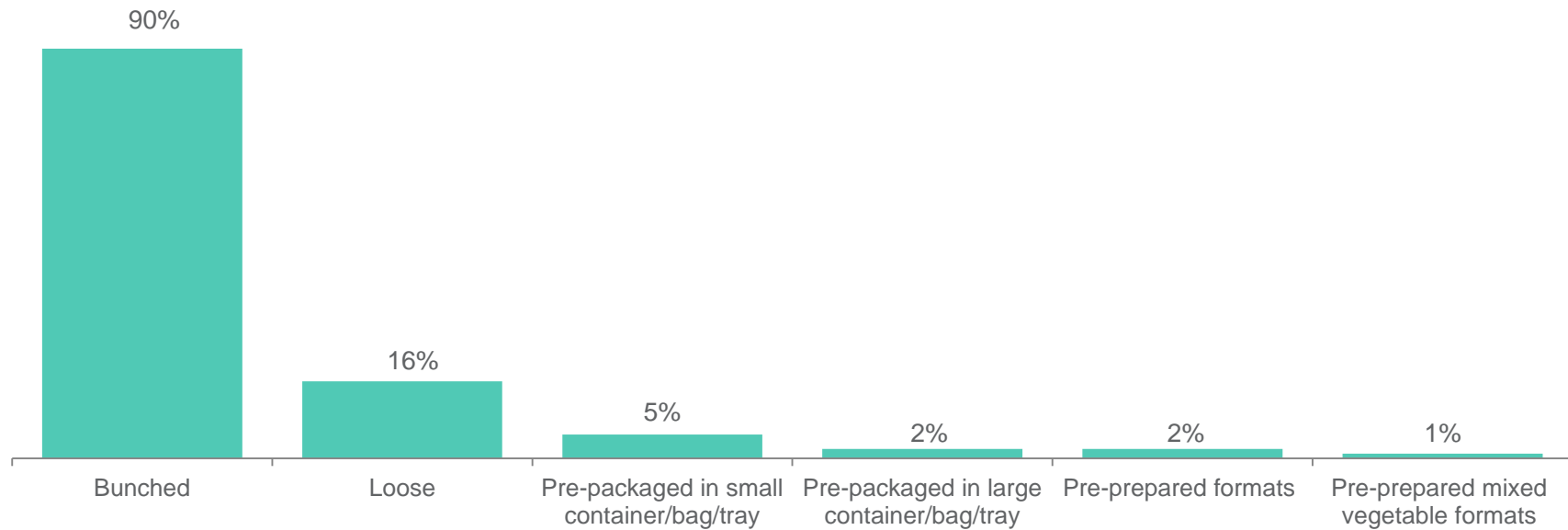
Value for money

Consumers' perceived value for money is fair for radish (**6.3/10**).

Q3. How much Radish 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 27 N=203



Bunched radish are the most common purchase format, this may be due to the lack of other format options available.

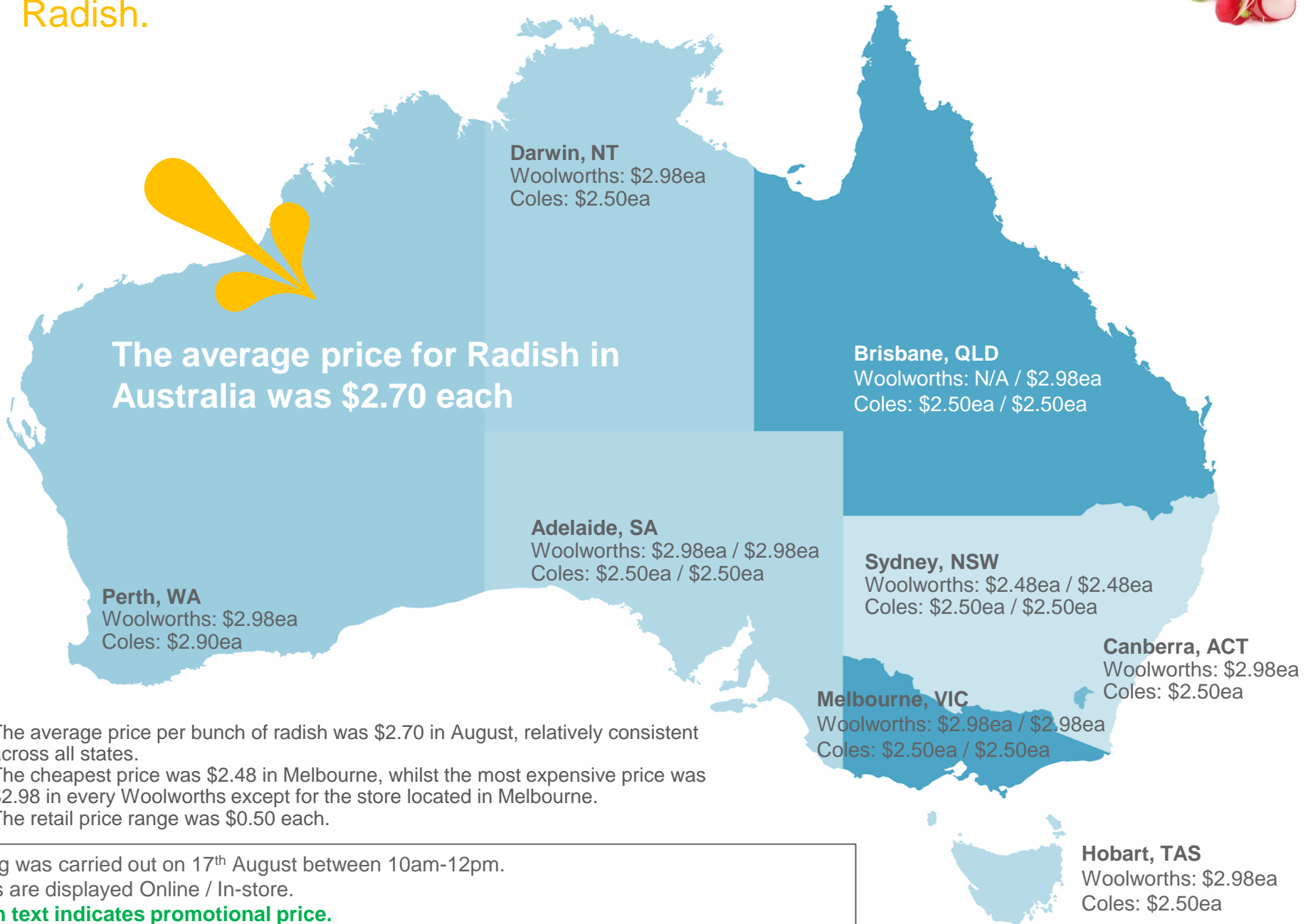


Q4b In what fresh formats do you typically purchase Radish?
Sample Wave 27 N=203



Online and In-store Commodity Prices.

Radish.

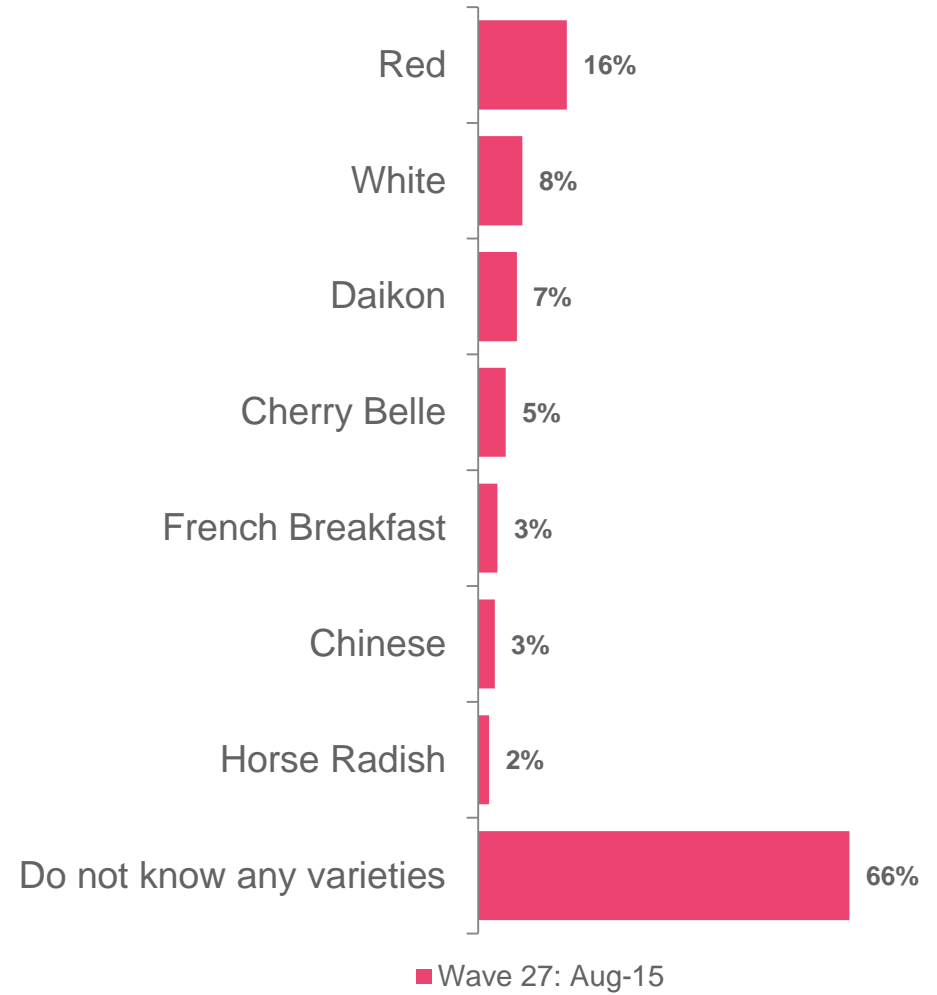


Pricing was carried out on 17th August between 10am-12pm.
 Prices are displayed Online / In-store.
Green text indicates promotional price.



Spontaneous awareness of radish varieties is low, with two thirds of consumers unable to recall a type.

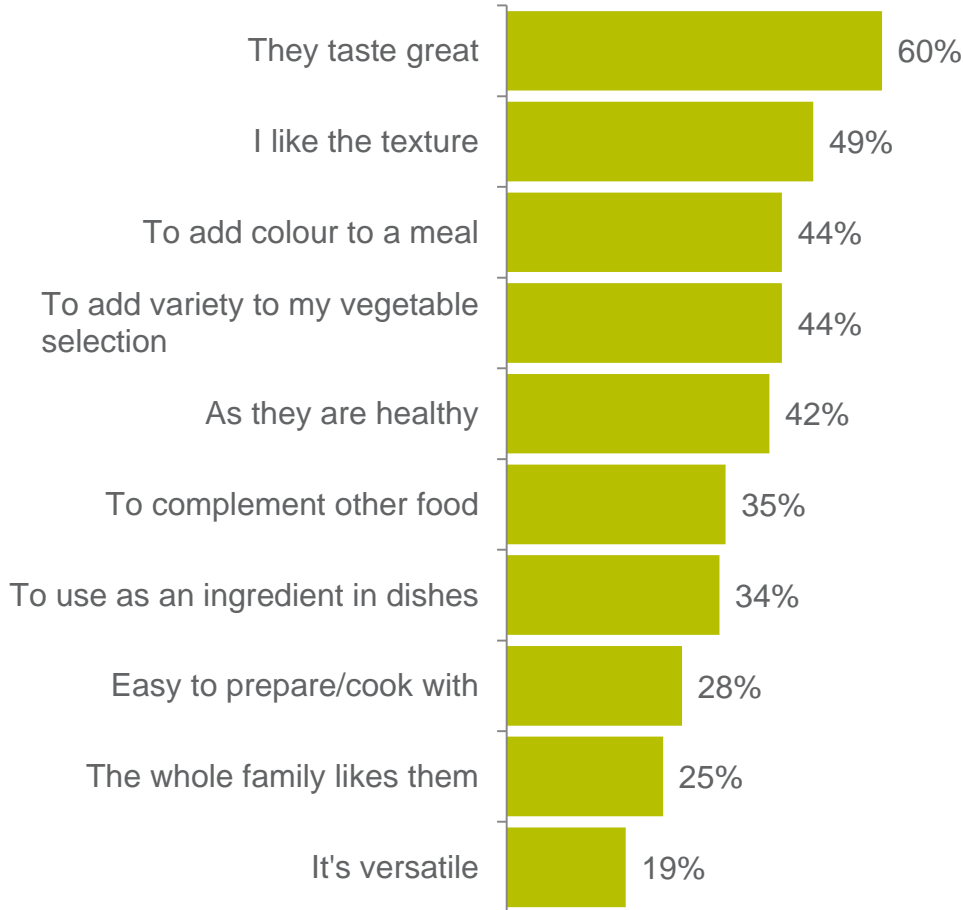
Consumers are generally prompted by colour and location for radish varieties.



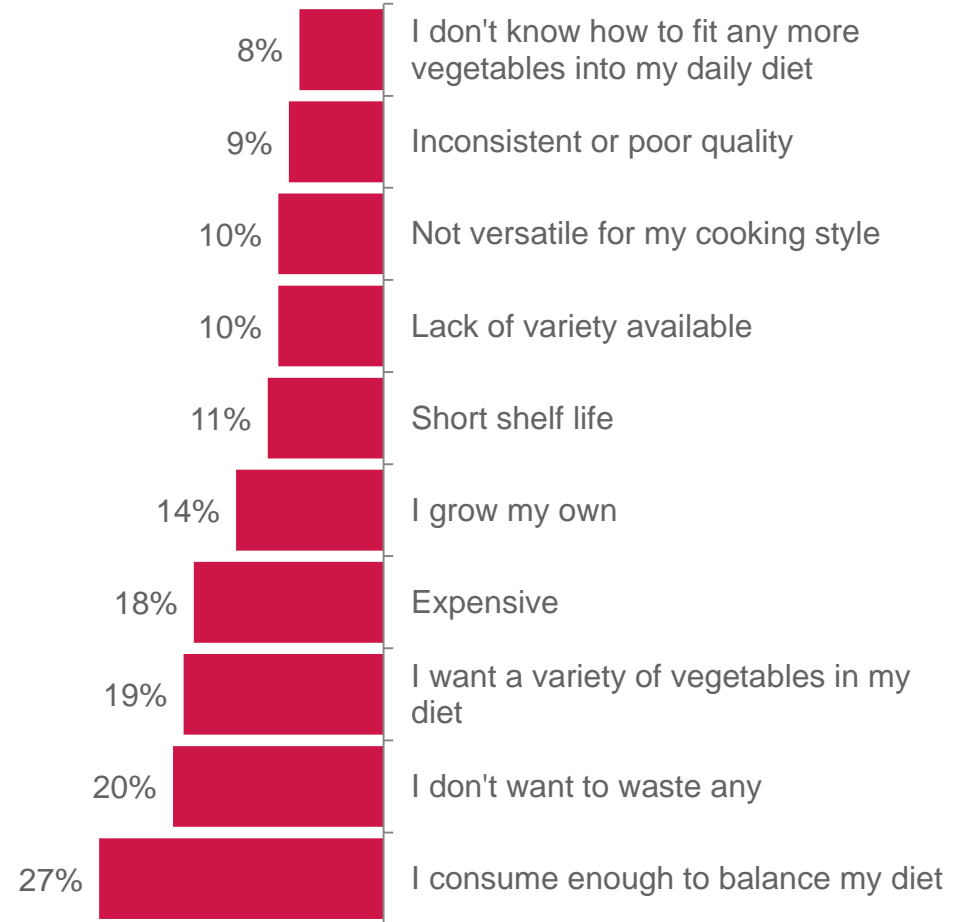


Taste, texture, colour and variety are the key drivers of purchase. Barriers to purchase are already consuming enough to balance diet and not wanting to waste any.

Triggers



Barriers



Q7. Which of the following reasons best describes why you purchase Radish?
Q8. Which reason best describes why you don't buy Radish more often?
Sample Wave 27 N=203



Traditional and Modern Australian cuisine and snacks are most popular for radish dishes.

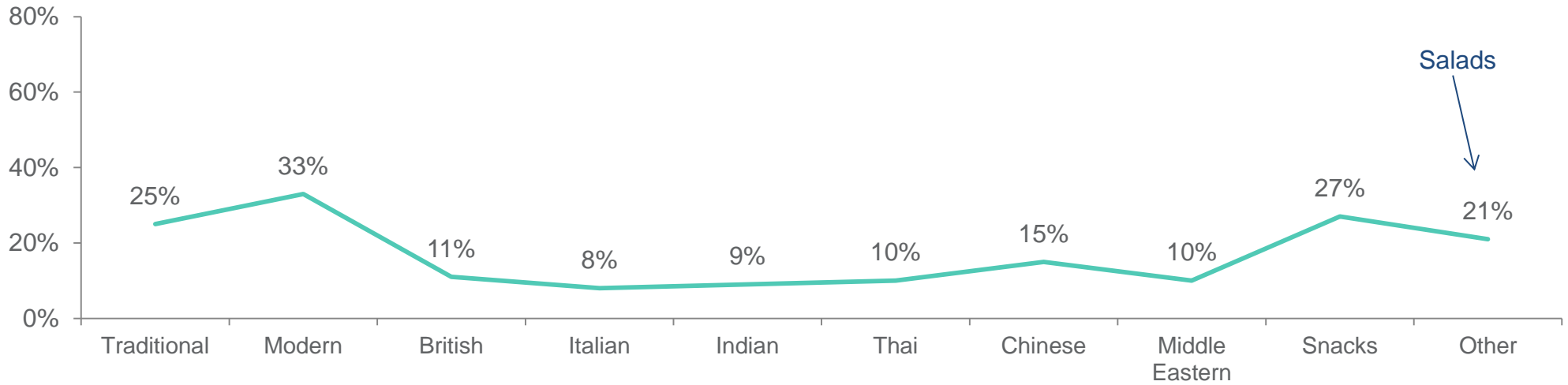
Meal occasions tend to occur during dinner and lunch.

Top 5 Consumption Occasions



Dinner	58%
Lunch	54%
Family Meals	39%
Quick Meals	36%
Weekday Meals	29%

Typical Cuisine Cooked



— Wave 27: Aug-15

← Australian → ← European → ← Asian → ← Other Cuisines →

Q10. What cuisines do you cook/consume that use Radish?
 Q11. Which of the following occasions do you typically consume/use Radish?
 Sample Wave 27 N=203

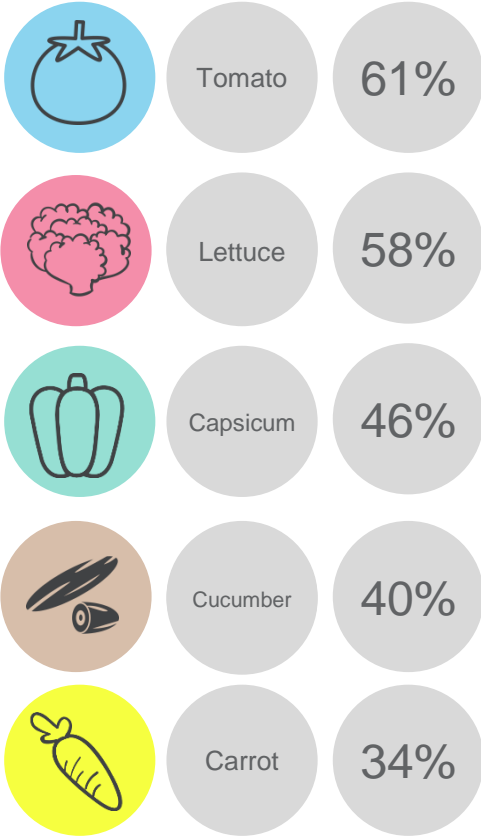


▼: Indicates LOWER score than current wave.
 ▲: Indicates HIGHER score than current wave.



Consumers prefer to serve radish with tomatoes and lettuce. Radish are usually consumed raw, but also used in stir fries and soups.

Accompanying Vegetables



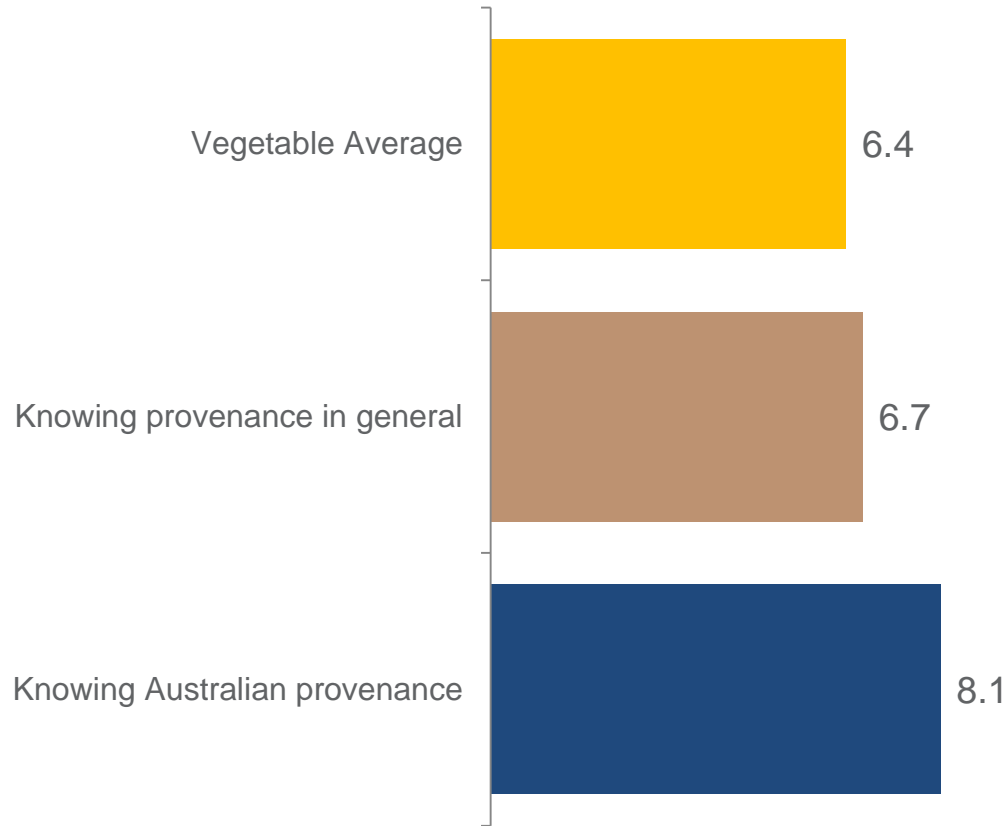
Top Cooking Styles

	Wave 27
Raw	80%
Stir frying	20%
Soup	13%
Slow cooking	7%
Frying	6%
Roasting	5%
Grilling	5%
Boiling	5%
Steaming	5%
Fermenting	4%

Q9. How do you typically cook Radish?
Q10a. And when are you serving Radish which of the following do you also serve together with this?
Sample Wave 27 N=203



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



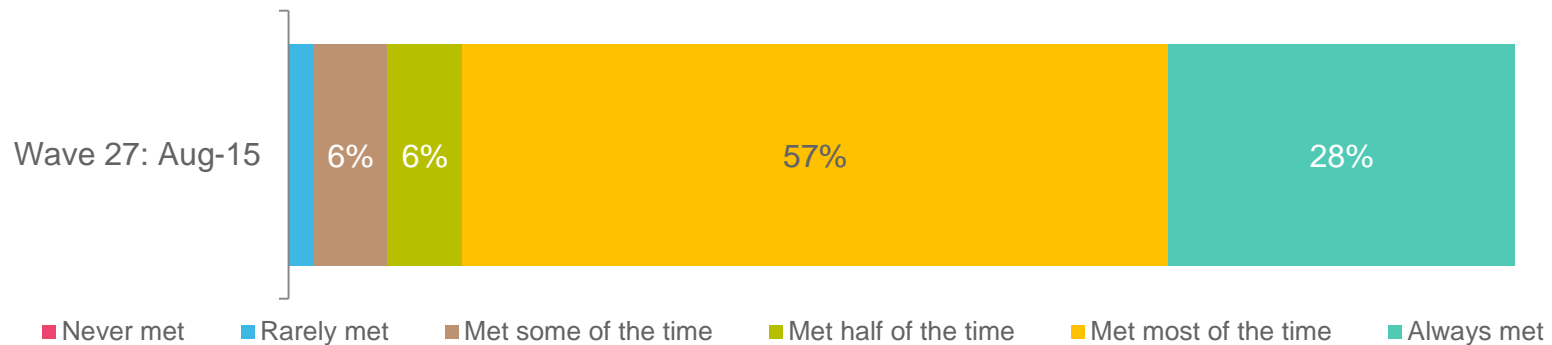
Q14. When purchasing Radish, how important is Provenance to you?
Q15. And when purchasing Radish, how important is that it is grown in Australia?
Sample Wave 27 N=203



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

Expected to stay fresh for 7.9 days

Expectations Met



Q12. How long do you expect Radish to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy Radish?
Sample Wave 27 N=203

A close-up photograph of several bright red radishes with green leafy tops, resting on a light-colored surface. A large, dark grey circular overlay is centered over the image, containing the text 'Radish Product Launch Trends.' in white.

Radish Product Launch Trends.

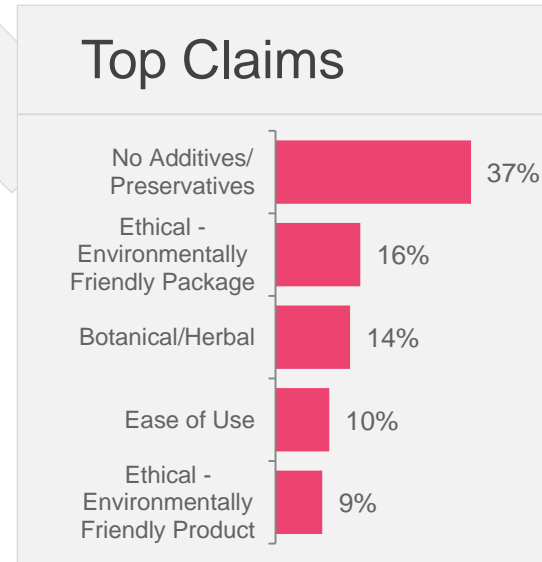
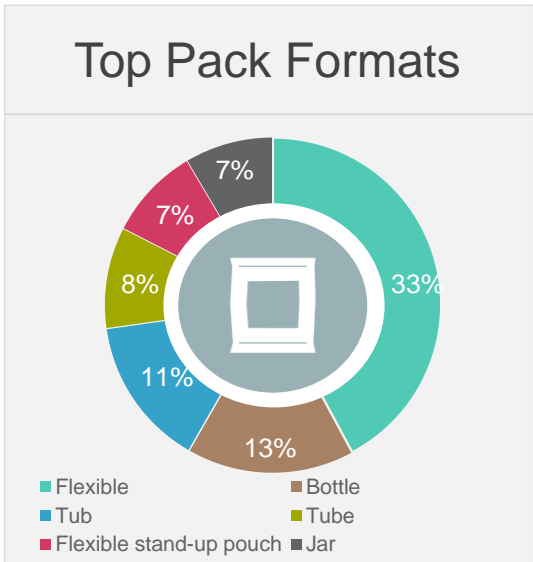
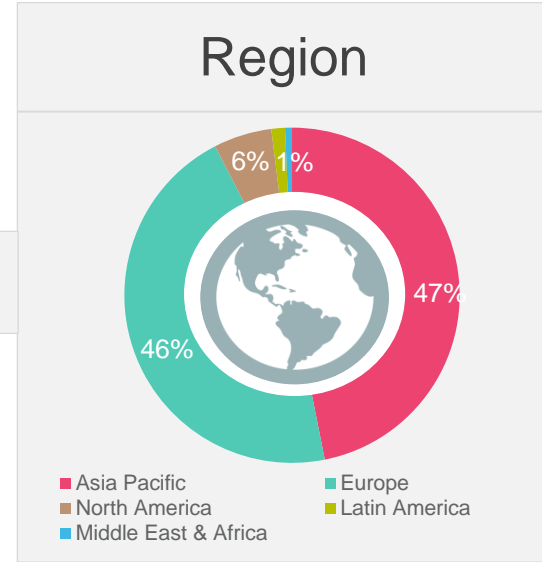
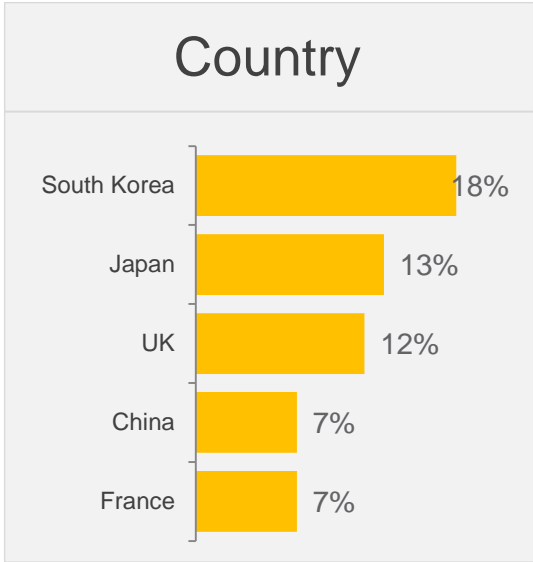
Radish Global Launches

August – October 2015

There were 303 radish products launched globally over the last three months. The majority of launches were in South Korea and Japan. Categories for launches were sugar & gum confectionary, and sauces & seasonings. Key packaging for radish products was flexible formats.



303 Global NPDs





Radish Product Launches: Last 3 Months (August – October 2015) Summary

- There were 303 launches in the past 3 months globally that contained radish as an ingredient.
- There were 5 products launched in Australia over the past three months.
- Asia Pacific (47%) and Europe (46%) were the key regions for launches.
- Flexible packaging (33%), bottles (13%) and tubs (11%) were the most common format used for products.
- The main categories for launches were sugar and gum confectionary (19%), sauces & seasonings (12%) and meals 11%.
- Claims used on products were no additives/preservatives (37%), and environmentally friendly packaging (16%).
- The most innovative product launched was the 18K gold nail hardener from Malaysia. Examples of other innovative launches can be found in the following pages.



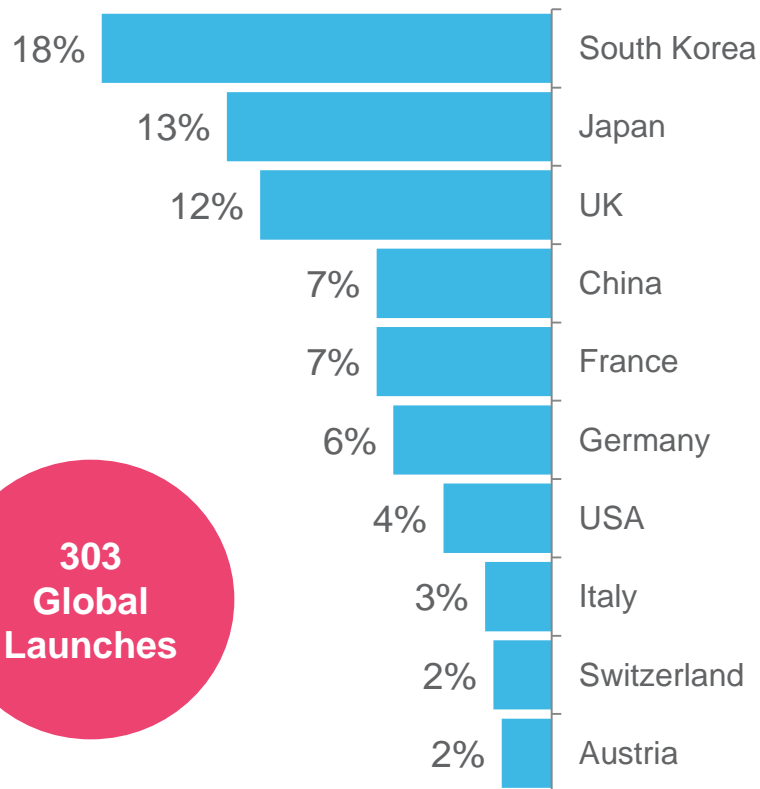
Source: Mintel (2015)



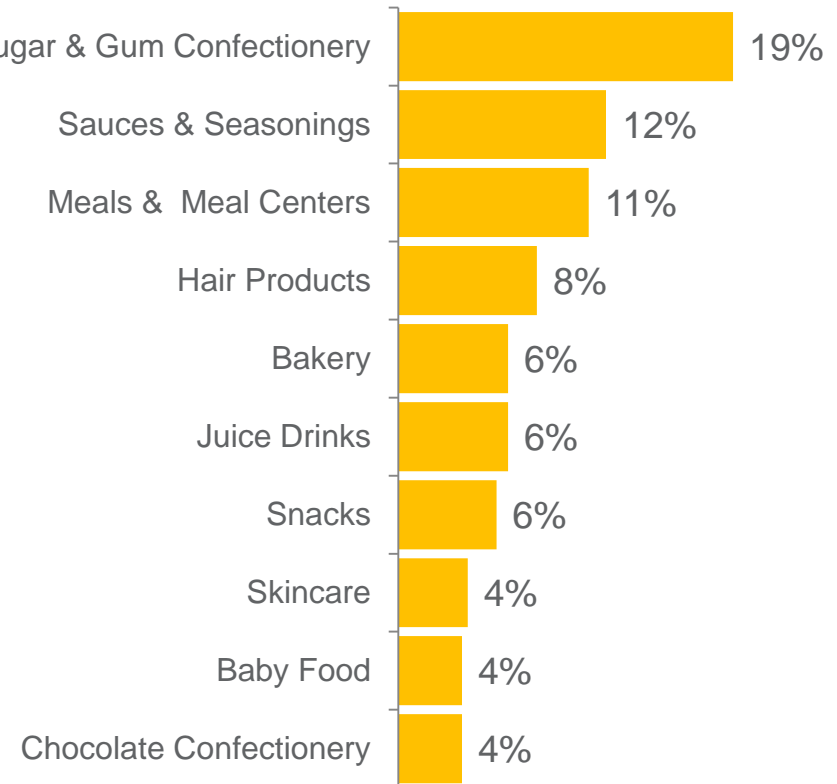
The majority of launches occurred in South Korea, Japan and the UK.

The key categories for radish launches are sugar & gum confectionery, sauces & seasonings, and meals.

Top Launch Countries



Top Launch Categories












303
Global
Launches












The main claim globally was no additives & preservatives. Ethical – environmentally friendly packaging and botanical/herbal were also popular claims. Flexible pack formats are popularly used in all regions.

Pack Formats Used

Global		Flexible	33%
		Bottle	13%
		Tub	11%
Asia Pacific		Flexible	23%
		Jar	13%
		Tub	13%
Europe		Flexible	42%
		Bottle	14%
		Tube	12%

Top Claims Used

Global		No Additives/Preservatives	37%
		Ethical - Environmentally Friendly Package	16%
		Botanical/Herbal	14%
Asia Pacific		No Additives/Preservatives	38%
		Ease of Use	17%
		Microwaveable	16%
Europe		No Additives/Preservatives	36%
		Ethical - Environmentally Friendly Package	23%
		Botanical/Herbal	19%

Only regions with n >30 are displayed

➤➤➤ Innovative Radish Launches: L3M (August – October 2015)

CJ CheilJedang Freshian Jeju Radish Water Kimchi Cold Noodles (South Korea)

CJ CheilJedang Freshian Jeju Radish Water Kimchi Cold Noodles consist of noodle, radish water kimchi soup and mustard sauce. The soup is made with Jeju radish harvested in winter and this is aged for 15 days for a deep refreshing taste. This product retails in a 908g pack that serves two.



Claims:
N/A

Blue Dragon Chilli Radish Paste (Norway)

Blue Dragon Radise och Chili (Chilli Radish Paste) is now available. The product provides a sweet and spicy flavour to any dish and retails in a 40g pack.



Claims:
N/A

Germline Rose Radish Sprouts (France)

Germline Fines Pousses Radis Rose (Rose Radish Sprouts) are said to be ideal for spring salads, terrines and purees, and can also be enjoyed with pizza or added to a sandwich. They feature cleansing, detoxifying and biliary stimulation properties thanks to their richness in vitamin A. The germination increase the natural vitamin content of seeds and promotes assimilation of minerals.



Claims:
No Additives/Preservatives, Organic, Other (Functional), Ethical - Environmentally Friendly Package, Convenient Packaging, Digestive (Functional)

Chen Hsiang Shi Pin Radish Cake (China)

Chen Hsiang Shi Pin Luo Bo Gao (Radish Cake) is processed according to a handmade technique. This product retails in a 960g pack containing 12 x 80g units.



Claims:
N/A

▶▶▶ Innovative Radish Launches: L3M (August – October 2015)

Pulmuone Red Cabbage Radish Pickles (South Korea)

Pulmuone Red Cabbage Radish Pickles is made with crisp radish, cauliflower and red cabbage for colour using a restaurant pickle recipe. This product is free from acetic acid, sodium saccharin, synthetic colourings carmine and preservatives. It retails in a 300g pack.



Claims:
No Additives/Preservatives

Frisk Mixed Fruit Flavoured Mini Tablets (Italy)

Frisk Microcomprese Aroma Frutti Misti (Mixed Fruit Flavoured Mini Tablets) are now available. The gluten- and sugar-free product is formulated with sweeteners, and retails in a 42g pack featuring a design by T. Murakami.



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

Lindt Hello We are Summer Chocolate Bits (Austria)

Lindt Hello We are Summer Chocolate Bits are a selection of white and milk chocolate pralines suitable for hot summer moments. The product retails in a 100g pack featuring the Lindt Sustainability reference and a QR code, and containing the following variants: Berry Affair, crunchy milk chocolate with tingly raspberry filling; Pink Explosion, white chocolate with a delicious cherry, blackberry and yogurt filling; and Coconut Love, white chocolate with a fruity coconut and pineapple filling.



Claims:
Ease of Use, Social Media, Time/Speed, Microwaveable

BeBecook Beef and Assorted Mushroom Porridge (South Korea)

BeBecook Beef and Assorted Mushroom Porridge is made of 12.5% beef, 12.5% king oyster mushroom, 9.4% enoki mushroom and 12.5% potato. This home-made style has been formulated to consider nutritionally well-balanced growth and development, and processed using the quick-freezing method to minimize the loss of nutrients. Made only with natural ingredients, it contains no preservatives, soy sauce or salt.



Claims:
No Additives/Preservatives, All Natural Product, Babies & Toddlers (0-4), Low/No/Reduced Sodium, Microwaveable

➤ Innovative Radish Launches: L3M (August – October 2015)

Aeon Topvalu Simmered Seasoned Daikon Radish (Japan)

Aeon Topvalu Simmered Seasoned Daikon Radish has been reformulated and repackaged. It features shredded daikon, carrot and fried tofu in bonito seasoning. The product, made with GMO-free soybeans, can be heated in a microwave or in boiling water. It retails in a 95g pack. Launched on April 8, 2015 with an RRP of 105 yen.



Claims:
GMO-Free, Economy, Microwaveable

FamilyMart Collection Pickled Daikon Radish (Japan)

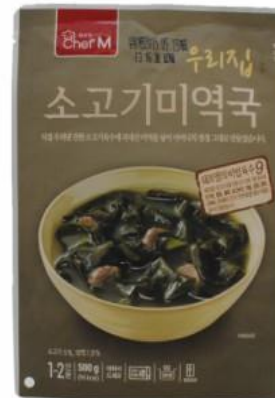
FamilyMart Collection Pickled Daikon Radish is made with domestically produced daikon radish, featuring a crunchy texture, and is coloured with natural colouring. The product retails in a 100g pack. Launched on June 2, 2015 with an RRP of 204 yen.



Claims:
N/A

Chef M Beef Seaweed Soup (South Korea)

Chef M Beef Seaweed Soup is made with thick soup stock, domestic seaweed and beef. The soup stock has been cooked with nine natural ingredients: Acanthopanax, Salicornia herbacea, dried pollack, shiitake mushroom, garlic, ginger, onion, red chilli seeds and kelp. This home-made style microwaveable product can be ready in four minutes and retails in a 500g pack.



Claims:
Microwaveable

Sally Hansen 18K Gold Nail Hardener (Malaysia)

Sally Hansen 18K Gold Nail Hardener is made with a real 18K Gold Shield containing: 18K gold; peptides; and amino acids, to form a barrier that is said to lock in moisture and strengthen the nails. The product is claimed to instantly leave the nails feeling stronger, harder and more durable to prevent breaking, shipping and splitting. According to the manufacturer, the nails look luminous, glowing and beautiful, and the product may be worn alone or under nail colour. It retails in a 10ml pack.



Claims:
Brightening / Illuminating, Time/Speed



Australian Radish Launches: L3M (August – October 2015)

Fox's Party Rings Iced Shortcake Rings

Fox's Party Rings Iced Shortcake Rings are free from artificial colours, flavours and preservatives. This product is suitable for vegetarians and retails in a 125g pack.



Claims:
No Additives/Preservatives, Vegetarian

Betty Crocker Creamy Deluxe Strawberry Flavoured Frosting

Betty Crocker Creamy Deluxe Strawberry Flavoured Frosting is new to the range. The ready-to-spread product retails in a 450g pack, featuring the Facebook logo.



Claims:
No Additives/Preservatives, Ethical - Environmentally Friendly Package, Low/No/Reduced Sugar, Microwaveable, Low/No/Reduced Sodium, Babies & Toddlers (0-4)

Caffarel Choc Bits Cornetto

Caffarel Choc Bits Cornetto features a mini cone with caramel flavoured cream and mini coloured chocolate discs. The product is available in a 25g pack.



Claims:
N/A

People for Plants Australian Organics Cleanser & Make Up Remover

Simonne Logue Fine Food Chicken & Leek Cocktail Pies have been relaunched under a new brand name, being formerly under the Simmone Logue Fine Food Company brand. This handmade product retails in a 660g pack containing 12 units.



Claims:
Vitamin/Mineral Fortified, Cleansing, Botanical/Herbal, Ethical - Environmentally Friendly Package, For Sensitive Skin, Ethical - Animal, Organic, Antioxidant



In the Media.





General Vegetable News

(August – October 2015)

- The developers of a new device, called the SCiO could give grocery shoppers the power to always buy ripe, perfect fruit and vegetables.
- It has taken three years for Consumer Physics to develop the technology, which can also tell you how sweet a piece of fruit is, or how many calories are in it.
- The technology could also help to reduce Australia's \$7.8 billion food waste bill, by reducing the damage in store from consumers who squeezed certain fruits and vegetables to test their ripeness.

Source: www.abc.net.au



Commodity News

(August – October 2015)



- The scientists from the Oxford University spin-off company Oxitec, are believed to have developed a way of genetically modifying and controlling invasive diamondback moths that cause serious pest damage to cabbages.
- These scientists have developed diamondback moths with a “self-limiting gene” which dramatically reduced populations in greenhouse trials.

<http://www.reuters.com>



- Papua New Guinea has banned the import of Australian vegetables, worth \$3.2 million a year to exporters.
- Celery is said to be affected along with other vegetables including potatoes, onions, capsicum, lettuce and carrots.
- The Department of Agriculture is talking with its PNG counterparts to have these bans removed as soon as possible.

www.abc.net.au



- California distributor Andrew & Williamson Fresh Produce has been hit with a lawsuit from a woman who said she was sickened after eating cucumbers sold by the company, which have been linked to a multi-state salmonella outbreak.
- The outbreak began on July 3 and has so far been blamed for 285 sicknesses in 27 U.S. states, including 53 hospitalisations and one death, according to the U.S. Centers for Disease Control and Prevention.

<http://www.reuters.com>



- After Don Pettit successfully grew a zucchini in space, a program was commissioned in 2013 to explore the prospect of growing vegetables and plants in space and on other planets. Another research study found that although gravity was an important influence on root growth, plants don't need gravity to flourish.
- Growing crops in space would solve one of the biggest issues in space travel: the price of eating. It costs \$10,000 to send one pound of food from Earth to the space station.

www.csmonitor.com

Commodity News

(August – October 2015)



- Breeders in Astrakhan, Russia are developing a new variety of eggplant which is pale green in colour and not bitter.
- The new eggplants have an elongated shape, like icicles, and doesn't form a skin until maturation.
- They will soon be submitted for biochemical analysis to determine composition of the vegetable and how healthy they are.

www.freshplaza.com



- Tony Abbott has been caught on camera munching into a spring onion.
- Mr. Abbott was touring an onion farm in Tasmania when he took a bite from the bitter vegetable with a straight face.

www.smh.com.au



- There are many health benefits from consuming radish.
- Radish is a very good source of potassium and has been positively connected to reducing blood pressure.
- Other benefits include that it improves the immune system, helps prevent cardiovascular diseases, protects liver and gallbladder from infections and can hydrate the body.

www.organicfacts.net



Background & Methodology.



➤ Background & Setting the Scene.

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

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

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

This wave's report (Wave 27, August 2015) focuses on:

- Cabbage
- Celery
- Cucumber
- Zucchini
- Eggplant
- Spring Onion
- Radish

This is the seventh wave of tracking for these specific commodities, and as such, the current report will bring to light any change over the past twelve months. This is the first wave of tracking for Spring Onion and Radish.

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





Online Methodology.

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

General Respondent Questions

Demographics

Vegetable Consumption

Commodity
1

Commodity
2

Commodity
3

Commodity
4

Commodity Specific Questions

Category Health

Purchase & Consumption Habits

Price Perceptions & Average Spend

Triggers/Barriers to Purchase

Preparation Preferences

+ 2 Ad hoc Questions per Month





Sample.

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 (cabbage, celery, cucumber, zucchini, eggplant, spring onion and radish) within the last month
- ⇒ Were the main or joint grocery buyer.

	Cabbage n=301	Celery n=301	Cucumber n=306	Zucchini n=303	Eggplant n=204	Spring Onion n=203	Radish n=203
Gender							
Male	38%	33%	36%	28%	38%	33%	43%
Female	62%	67%	64%	72%	62%	67%	57%
Age							
18-24 y.o.	6%	7%	8%	8%	2%	1%	3%
25-34 y.o.	20%	22%	25%	24%	17%	13%	13%
35-44 y.o.	17%	20%	21%	20%	14%	11%	20%
45-54 y.o.	20%	15%	16%	16%	18%	23%	21%
55-64 y.o.	18%	18%	15%	17%	30%	25%	24%
65+ y.o.	19%	18%	14%	15%	20%	26%	19%
Household							
Single Income no Kids	21%	18%	19%	19%	23%	19%	18%
Double Income no Kids	18%	20%	22%	19%	19%	18%	16%
Young Families	14%	20%	21%	21%	9%	11%	15%
Established Families	23%	21%	22%	21%	23%	22%	23%
Empty Nesters	24%	22%	16%	20%	27%	31%	29%
Location							
New South Wales	20%	23%	24%	23%	21%	14%	16%
Victoria	15%	16%	13%	17%	20%	14%	14%
South Australia	19%	20%	18%	19%	12%	15%	19%
Queensland	17%	19%	19%	18%	12%	18%	18%
Western Australia	22%	16%	21%	16%	17%	14%	14%
Tasmania	6%	6%	4%	4%	11%	19%	12%
Australian Capital Territory	1%	1%	1%	2%	5%	3%	4%
Northern Territory	1%	0%	1%	1%	3%	3%	2%





Trends Research: Our Approach

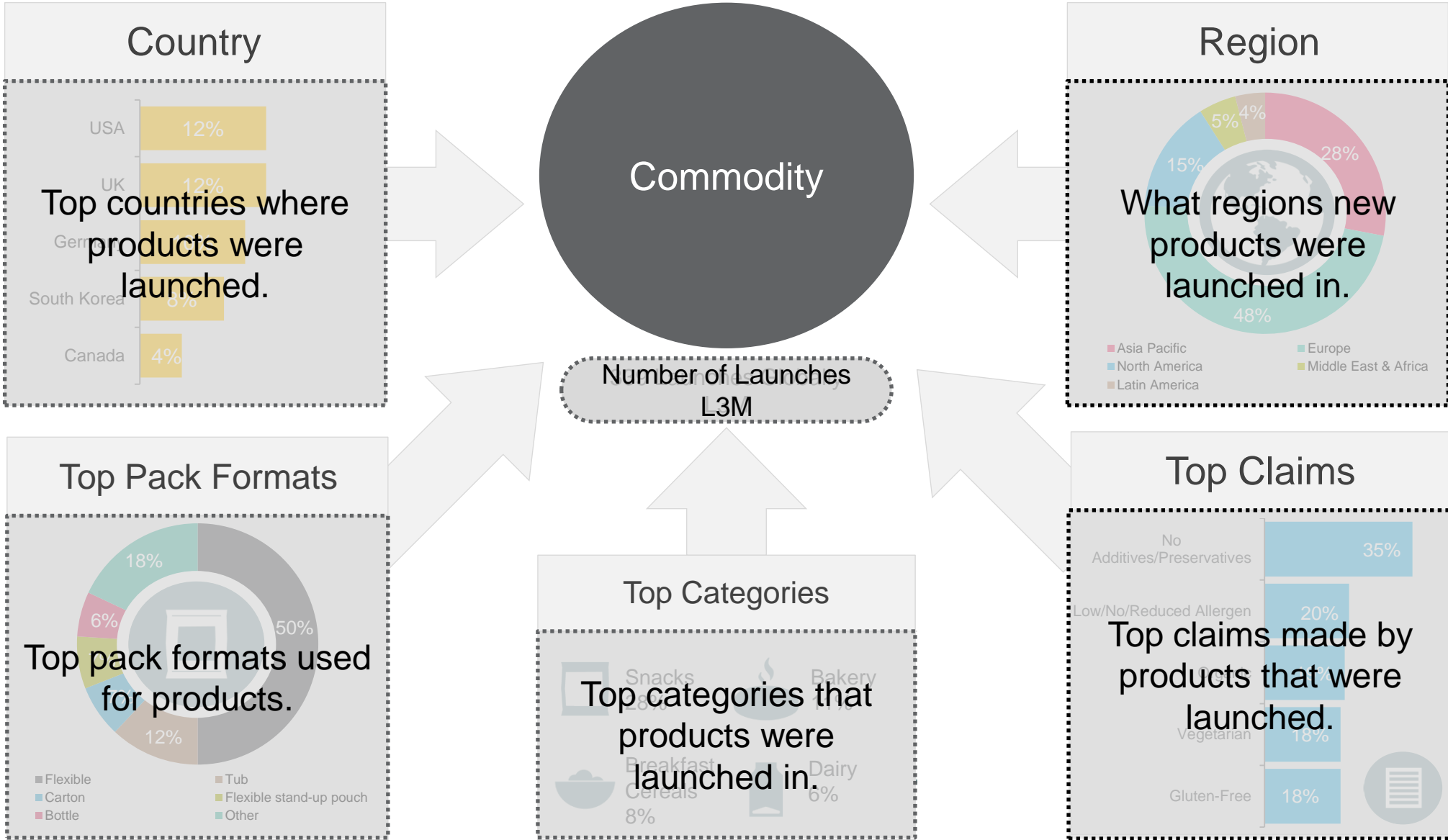


- ▶ Colmar Brunton has used a combination of both desk research and in the field of market research to explore the trends of each vegetable commodity being tracked this month.
- ▶ Our main source of secondary data for this report was collected from Mintel Global New Products Database (GNPD).
- ▶ This data source is used to analyse products launched around the globe in the last 3 months (L3M) that contained each vegetable being tracked as a core ingredient.
- ▶ Trends are determined at a global and regional level.
- ▶ Claims and pack types used for the launched products are explored and the relevant product categories are determined. Specific examples of products being launched around the globe that are particularly innovative are displayed for reference.
- ▶ Trend reports are provided monthly and will reflect the 7 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.

