



Project Harvest Monthly Tracker Report.

Wave 28, September 2015

Vegetables tracked: Asian Vegetables,
Capsicum, Brussels Sprouts, Spinach,
Parsnips, Beetroot, Sweetpotatoes

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Wave 28: Executive Summary

Industry Insight.

Generation Y, the Boomerang Generation, Trophy Kids, the Peter Pan Generation, Echo Boomers and the MTV Generation... also known as the Millennials: the largest generation in Australia today and the main grocery buyers of tomorrow.

Although there are no precise dates marking when the generation starts and ends, most researchers and commentators use birth years ranging from the early 1980s to the early 2000s (e.g. 10-34 year olds). This generation is considered to be highly educated, and are leaders when it comes to technology and the uptake of web activities and lifestyle trends. Their body is their temple, they crave knowledge about everything they consume and they have high expectations as to what is available and how it is made available to them.

According to the 300 Millennials interviewed for the Deloitte Millennial Innovation Survey in 2013, climate change is the biggest problem facing society in the next 20 years. They have a desire to be “green”, as exemplified in the US where those aged up to 35 years were significantly more likely to have their purchases influenced by environmental impact than their older counterparts. This is also where 61% of Millennials expressed a greater willingness to pay more for products guaranteed to have ethical and responsible manufacturing practices. The remainder may expect it to be standard.

Industry Insight continued.

The increase in consumption of natural or healthy produce has coincided with the financial maturation of Millennials. At the same time, restaurant menus are becoming simpler, using fewer elements while increasing the quality of their ingredients; Meal Kits featuring non-adulterated whole foods are in double-digit growth (Industry Insight, Project Harvest Tracker Wave 27); and the purchase of frozen foods has reduced based on perceptions of these being too “processed”.

Specifically, it has been found that Millennials shop significantly more frequently than their older counterparts (Colmar Brunton’s Shopper Pulse, Retail World 2015), a behaviour that has been linked to higher vegetable consumption (Industry insight, Project Harvest Tracker Wave 27).

Recent waves of the current consumption tracker also reveal that Millennials:

- ▶ Are more likely to purchase pre-packaged formats than other generations
- ▶ Are less likely to purchase vegetables in loose/individual formats
- ▶ Have a lower average vegetable purchase weight
- ▶ Are less likely to grow their own vegetables, and are therefore less likely to have this as a barrier to vegetable purchase
- ▶ Are less likely to purchase their vegetables through specialist fruit and vegetable retailers

So call them what you will: getting to know the largest generation of today, and the main grocery buyers of tomorrow, will undoubtedly be pivotal for the Australian vegetable industry’s future success.

Wave 28 Fast Facts – Asian Vegetables

- ▶ Asian vegetables have positive consumer sentiment and propensity to purchase, consistent with previous waves.
- ▶ Asian vegetables are purchased 5 times per month and are consumed 9 times per month, in line with past months.
- ▶ Consumers purchase 0.9kg of Asian vegetables per shop. Recalled last spend is \$4.80. Overall, consumers perceive Asian vegetables to be good value for money.
- ▶ National price tracking indicated the average price for Buk Choy in September was \$2.29, which is relatively consistent between states and retailers.
- ▶ Awareness has continued to improve, with only one fifth of consumers unable to recall a type of Asian vegetable. Buk Choy remained the most recalled type of Asian vegetable, followed by Pak Choy and Choy Sum.
- ▶ Asian vegetables are expected to stay fresh for nearly 6 days, and freshness expectations are met most of the time. Asian vegetables appear to be largely unaffected by seasonal changes.
- ▶ Ease of preparing and short cooking times are the main influences on purchase of Asian vegetables. Short shelf life and not wanting to waste any are primary barriers to purchase.

6.8/10

is how consumers rate Asian vegetables on value for money, meaning value is good.

1.

Insight:

With a high consumption and strong future purchase intent, there is a need to highlight the versatility of Asian vegetables outside of typical Chinese cooking.

Short Term Recommendation:

Promote the versatility of Asian vegetables through recipe and meal ideas including salad, soups, omelettes and salsa recipes.

2.

Insight:

Short shelf life is the key barrier to purchase and is increasing as we enter warmer months.

Long Term Recommendation:

At the grower level, investigate alternative storage and transportation of Asian vegetable to retailers such as refrigerated trucks. At the retailer level, determine optimal displays to retain freshness including misting and ice.



Wave 28 Fast Facts – Capsicum

- Consistent with previous waves, capsicums have strong category health figures for importance, satisfaction, endorsement and interest in new varieties.
- Purchase and consumption frequency of capsicum both increased. Capsicum is consumed on average 10 times per month and is purchased mainly from mainstream and specialist retailers.
- Consumers are purchasing 610g of capsicums on average. Recalled last spend is \$3.80, which is perceived to be fair value for money.
- Price tracking for September 2015 showed the national average as \$5.33 per kg for green capsicums.
- Nearly one half of consumers were unable to recall a type of capsicum. Colour was the main trigger to recall.
- Taste and colour were the key influences to purchase. Barriers to purchase include not wanting to waste any and consuming enough for their needs.
- Consumers expect capsicums to remain fresh for over 8 days once purchased. These expectations are in line with previous waves and are generally met.

19%

of new products launched globally in the past 3 months were snack related.

1.

Insight:

Three quarters of consumers are eating capsicum at dinner meal occasions, whilst snacking is on the decline.

Short Term Recommendation:

As the snacking market in Australia is on the rise this presents an opportunity for capsicums to position as a snack alternative. Investigate pre-cut capsicum strips to appeal to on-the-go consumers.

2.

Insight:

There has been little movement in tracking results for capsicums this wave.

Long Term Recommendation:

Investigate ways to rejuvenate the category. This may include differentiating the varieties of capsicums to promote use of multiple types, as well as highlighting the versatility of capsicums, as they can be used in both hot and cold dishes.



Wave 28 Fast Facts – Brussels Sprouts

- ▶ Brussels Sprouts had relatively strong category health figures, with all aspects sitting above the Vegetable Averages.
- ▶ Brussels Sprouts were purchased around three times per month and were consumed six times per month, which was higher than previous waves.
- ▶ Overall, Brussels Sprouts were perceived to be good value for money. Consumers on average purchase 700g of Brussels Sprouts, typically in the format of individual sprouts. Recalled last spend was \$4.00.
- ▶ Price tracking for September 2015 revealed the average price was \$10.71 per kg, substantially higher than \$7.48 per kg recorded in May 2014.
- ▶ Three quarters of consumers could not name any types of Brussels Sprouts. Low awareness was consistent with previous waves.
- ▶ Brussels Sprouts were expected to stay fresh for nearly 9 days, which was met most or all of the time.
- ▶ Top triggers for purchase were taste and health. Key barriers to purchase were already consuming enough and wanting a variety in their diet.

6.4
times per
month

is the average number of consumption occasions per month for Brussels Sprouts.

1.

Insight:

Purchase of Brussels Sprouts is driven by taste and appeal for the whole family.

Short Term Recommendation:

To encourage greater purchase, clearly call out flavour descriptions at point of sale and on pack, so that consumers can easily incorporate Brussels Sprouts into everyday meals.

2.

Insight:

Brussels sprouts suffer from negative word-of-mouth (as discovered in our ad-hoc study 2014) and this can impact on perceptions and purchase, with consumers unsure of how to cook and use them.

Long Term Recommendation:

Reinvigorate consumers' excitement and interest in Brussels Sprouts by promoting its superfood and nutritional status.



Wave 28 Fast Facts – Spinach

- ▶ Spinach scored well on perceived importance, endorsement and interest. Future purchase intent for spinach is high.
- ▶ Purchase of spinach occurred around 5 times per month and was consumed on average 10 times per month.
- ▶ Overall, spinach was perceived to be fairly good value for money, with recalled last spend at \$3.80.
- ▶ Consumers on average purchase 0.5kg of spinach, typically in a loose format, with pre-packaged formats also popular options.
- ▶ Price tracking for September 2015 revealed that the average price of Baby Spinach was \$16.56 per kg, reasonably consistent across states and retailers.
- ▶ One third of consumers could not recall a type of spinach. English and Baby were the most recalled types.
- ▶ Spinach was expected to stay fresh for 6 days, which was met most of the time.
- ▶ Top triggers for purchase were based around health, ease of preparation, and taste. In contrast, the key barriers include a short shelf life, not wanting to waste any and already consuming enough to balance their diet.

5.2
times per
month

is the average number purchase occasions per month for spinach.

1.

Insight:

Health is the key trigger to purchasing spinach.

Short Term Recommendation:

Further promote the specific health benefits of spinach by highlighting the high levels of Vitamin A, B2, C and K in-store and on pack. This will appeal to our Conscious Improver consumers who are driven by the health benefits of vegetables.

2.

Insight:

There were over 600 new spinach product launches in the last 3 months. Only 4% were produced in Australia.

Long Term Recommendation:

There is an opportunity to develop more new products that contain spinach. With recent health trends seen globally, juices and drinks are a potential market that is currently under developed in Australia.





Wave 28 Fast Facts – Parsnip

- ▶ Parsnips hold lower levels of importance, satisfaction and endorsement than other vegetables, with future purchase intent relatively weaker than other commodities tracked.
- ▶ Parsnips are purchased on average twice per month and consumed on 4 occasions per month. Purchase is primarily from mainstream retailers and specialist fruit and vegetable retailers.
- ▶ On average consumers are purchasing 700g of parsnips per shop. Recalled last spend was \$3.70, with value for money perceived as fair.
- ▶ Price tracking revealed an average price of \$9.99 per kg of parsnips.
- ▶ There are low levels of awareness of parsnip types.
- ▶ The main motivations for purchasing include taste and adding variety. Expense and already consuming enough are the key barriers to purchase.
- ▶ Parsnips are expected to stay fresh for over a week. Expectations of freshness are met most of the time.

74%

of consumers roast parsnips as their main cooking style.

1.

Insight:

Parsnips are purchased infrequently and are currently perceived to have limited cooking styles and cuisines.

Short Term Recommendation:

Provide consumers with recipe ideas and cooking techniques at point of sale to encourage creativity and repeat purchase.

2.

Insight:

There is a high level of purchase through non-mainstream retailers including specialist retailers, markets and independents.

Long Term Recommendation:

Investigate alternative supply chain and retail opportunities to ensure widespread availability.





Wave 28 Fast Facts – Beetroot

- ▶ Beetroot has strong levels of endorsement, indicating consumers are happy to recommend to family and friends. Future propensity to purchase is high.
- ▶ Beetroot is purchased approximately 3 times per month. Consumption of beetroot occurs 8 times per month, an increase from the previous wave.
- ▶ On average, consumers purchase 1kg of beetroot. Recalled last spend was \$3.90. Overall, consumers perceive good value for money.
- ▶ Price tracking revealed both loose and bunched beetroot could be purchased from most mainstream retailers. Average price per kg in September was \$5.04.
- ▶ Awareness of beetroot types is very low, with two thirds of consumers unable to recall a type.
- ▶ Beetroot is expected to remain fresh for over 10 days. Freshness expectations have increased and are being met most of the time.
- ▶ Taste and health remain the key triggers to purchase. The main barriers to future purchase are consuming enough and wanting variety in diets.

\$5.04

was the average price per kg for Beetroot in September 2015.

1.

Insight:

Perceptions of longevity of freshness are declining across waves, however consumers expect beetroot last for 10 days once purchased, a relatively long shelf life.

Short Term Recommendation:

Educate consumers about freshness at point of sale including best before dates and storage instructions to increase longevity expectations.

2.

Insight:

Beetroot is primarily being used as a colouring agent in new products. However, the snacking category is increasing.

Long Term Recommendation:

New product launches in Australia are currently low. There are many potential areas of opportunity for product development including beetroot dips, relish, yoghurt, chips and juices/smoothies.





Wave 28 Fast Facts –Sweetpotatoes

- ▶ Sweetpotato has strong endorsement, with consumers relatively satisfied with the vegetable.
- ▶ Purchase of sweetpotato occurs 3 times per month and is consumed 7 times per month, an increase from the last wave. Purchase is typically from mainstream retailers.
- ▶ Overall, sweetpotato is perceived to be good value for money (6.6/10). On average, consumers purchase 1.1kg of sweetpotato, typically loose. Recalled last spend is \$3.20.
- ▶ Price tracking for September 2015 revealed an average price of \$3.76 per kg, down from May prices.
- ▶ Two thirds of consumers were unable to recall a variety of sweetpotato. Those who did more often recalled the colour rather than a specific variety, with Orange / Gold / Yellow being the most recalled colour.
- ▶ Taste, ease of preparation and health are the strongest triggers to purchase, while already consuming enough for their needs and wanting variety in vegetables are the two biggest barriers.
- ▶ Consumers expect sweetpotato to remain fresh for nearly two weeks. Expectations of freshness are largely met.

13.1 days

is the expected length of freshness for Sweetpotatoes.

1.

Insight:

Health and specific nutritional benefits are key drivers of sweetpotato purchase.

Short Term

Recommendation:

Appeal to health conscious consumers by positioning as the “healthy carb” option. Provide recipe ideas at point of sale where sweetpotato is used as the key carb i.e. sweetpotato chips, mash (instead of rice), and lasagne sheets (instead of pasta).

2.

Insight:

In Asia, product launches are focused on convenience by being microwaveable, while in Australia, ease of preparation is a trigger to purchase.

Long Term

Recommendation:

Investigate development of quick and convenient microwaveable sweetpotato products such as pre-prepared packs with flavoured butter, herbs and spices appealing to quick meal occasions.





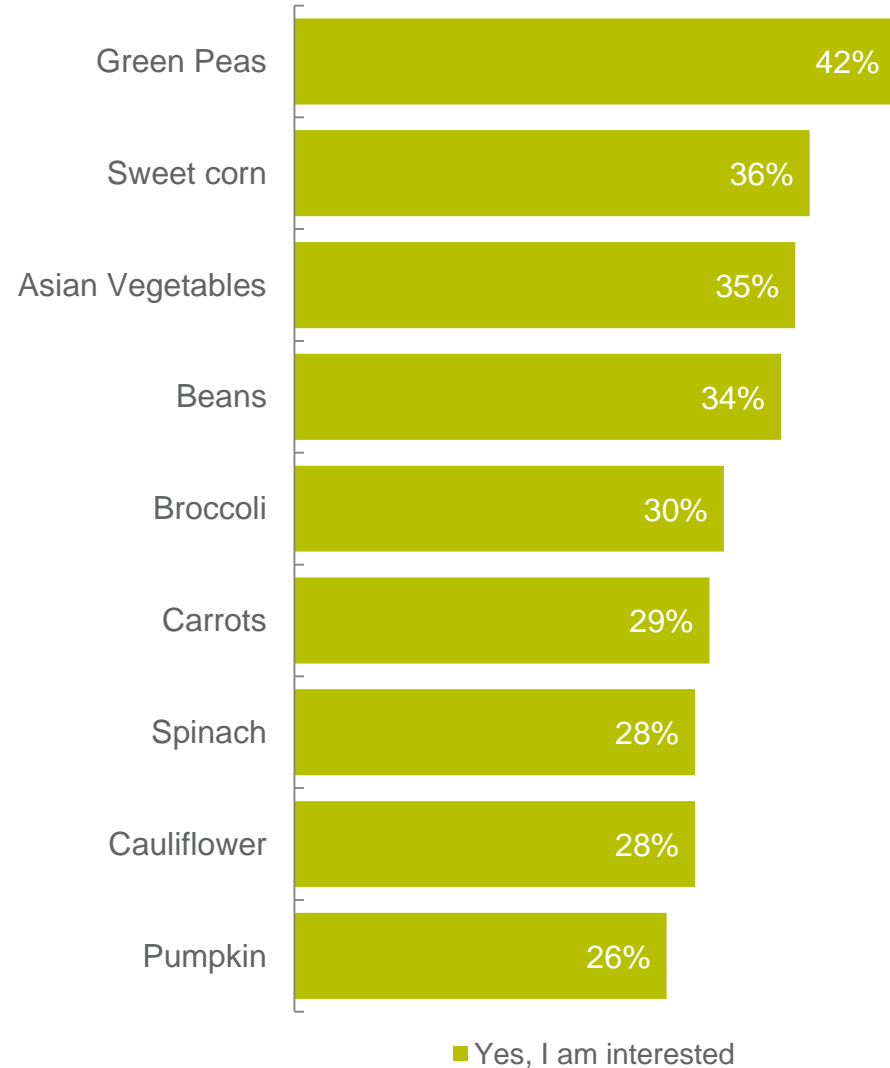
Wave 28:
Response to Ad hoc
Questions



Pre-Prepared and Packaged Vegetables.

Respondents are most interested in pre-prepared and pre-packed green peas, sweet corn and Asian vegetables.

These vegetables are perceived as requiring more preparation to cook, and therefore convenient pre-packaged options would save the most time for these commodities.



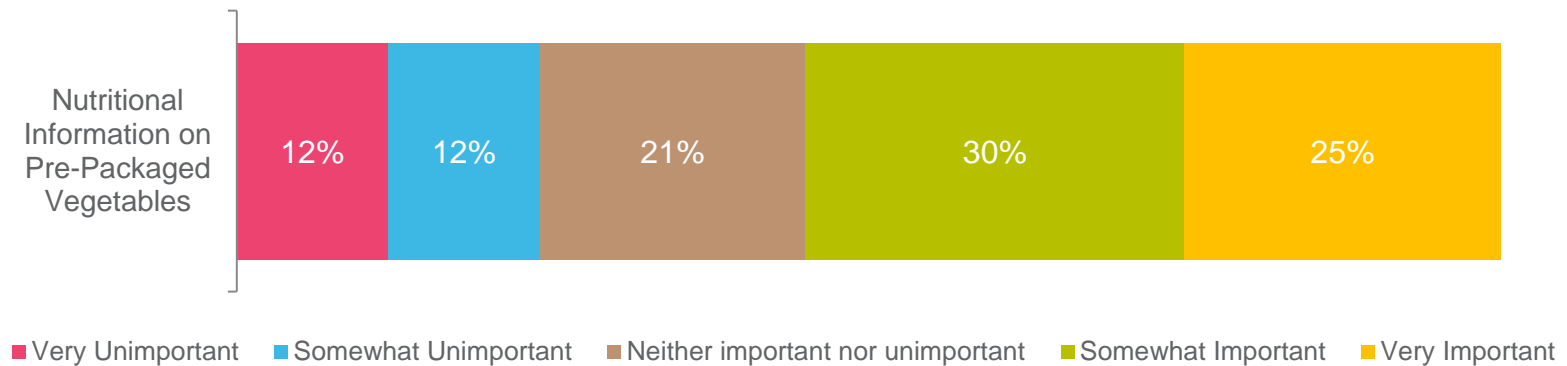


Nutritional Information.

Pre-Packaged Vegetables.

Over half of respondents stated that having nutritional information on pre-packaged vegetables is important.

If this is a possibility for packers and growers, it would be recommended to include as much nutritional information as possible. This information particularly appeals to our Conscious Improver consumers who are driven to purchase vegetables because of the health benefits.





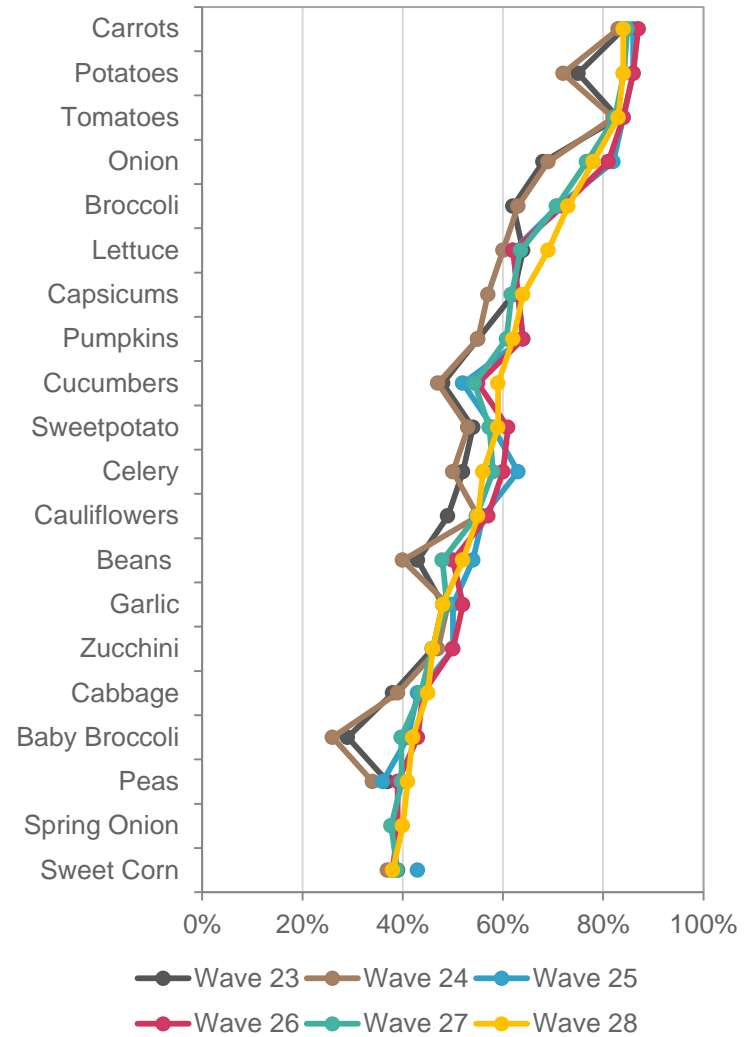
Wave 28: Overall Vegetable Tracking



Top 20 Vegetables Purchased Last Month

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

Vegetable purchase in September is relatively consistent with past months. Increased lettuce and cucumber purchases reflect the warmer weather seen this month.



Sample Wave 28 N=1514 (base in higher as Q appears in Screener)
S8. Which of the following fresh vegetables have you purchased in the last month?



Category Health Explained.

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

The Harvest Project Average is the average of all commodities tracked thus far in this program.

- ➔ 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 remain strong, especially for endorsement and interest, compared with the vegetable average.

Asian vegetables, spinach and beetroot all have strong future purchase intent, whilst other commodities appear stable.

	Asian Vegetables	Capsicum	Brussels Sprouts	Spinach	Parsnip	Beetroot	Sweet-potatoes	Vegetable Average
Importance	7.4	7.3	6.5	7.2	6.1	5.8	6.0	6.3
Satisfaction	6.7	7.2	6.7	6.9	6.2	6.3	6.8	6.6
Endorsement	7.4	7.4	7.0	7.6	6.5	7.6	7.8	6.9
Interest (New Varieties)	7.1	6.8	6.6	7.0	6.3	6.7	6.6	6.2
Future Purchase								
More	28%	18%	18%	25%	13%	23%	17%	16%
Same	71%	81%	79%	74%	86%	76%	83%	83%
Less	1%	1%	3%	1%	1%	1%	0%	1%

Vegetable Average is the mean of all commodities from Wave 1, up to and including current wave.



Asian
Vegetables.



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

Coles remains the key location for purchase. However, there has been an increase in purchase from specialist retailers this wave.

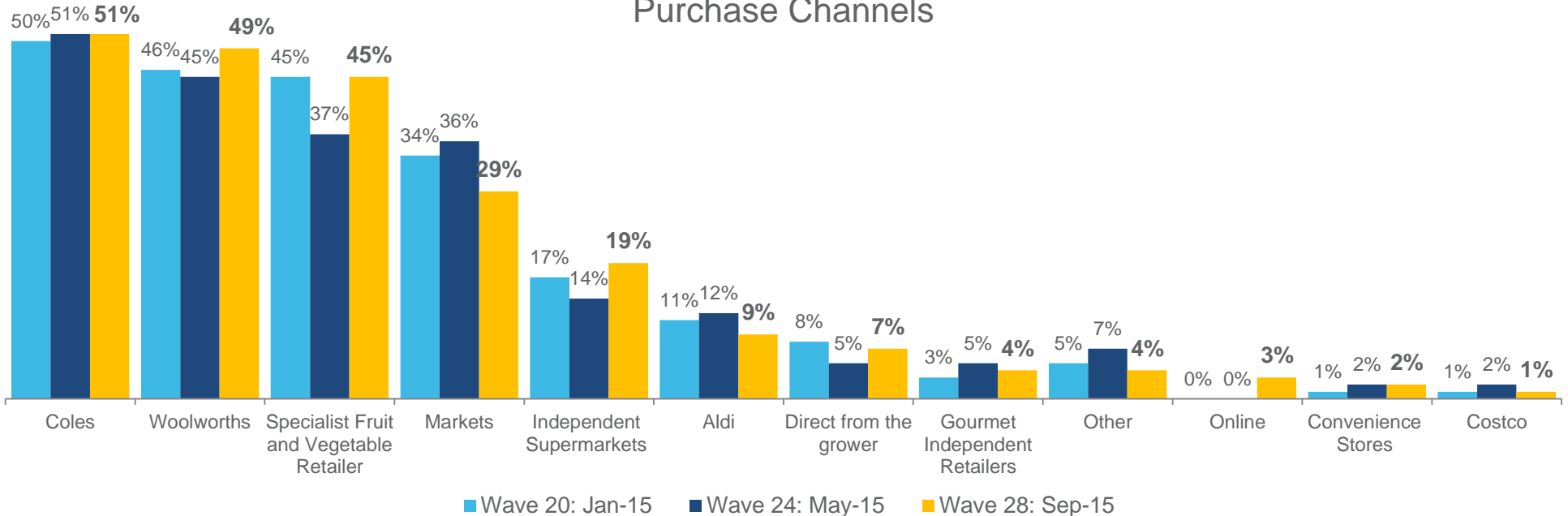


▼ 4.9 times, Wave 20
 ▲ 5.0 times, Wave 24



▲ 9.0 times, Wave 20
 ▼ 8.8 times, Wave 24

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 20 N=317, Wave 24 N=311, Wave 28 N=310



Average Spend and Price Sensitivity.



Average weight of purchase

The average consumer typically purchased **0.9kg** of Asian Vegetables in September 2015, which is slightly lower than previous waves.

- ▲ 1.0kg, Wave 20
- ▲ 1.0kg, Wave 24



Recalled last spend

The average recalled last spend in September 2015 is **\$4.80**. This is substantially lower than past months.

- ▲ \$6.00, Wave 20
- ▲ \$5.90, Wave 24



Value for money

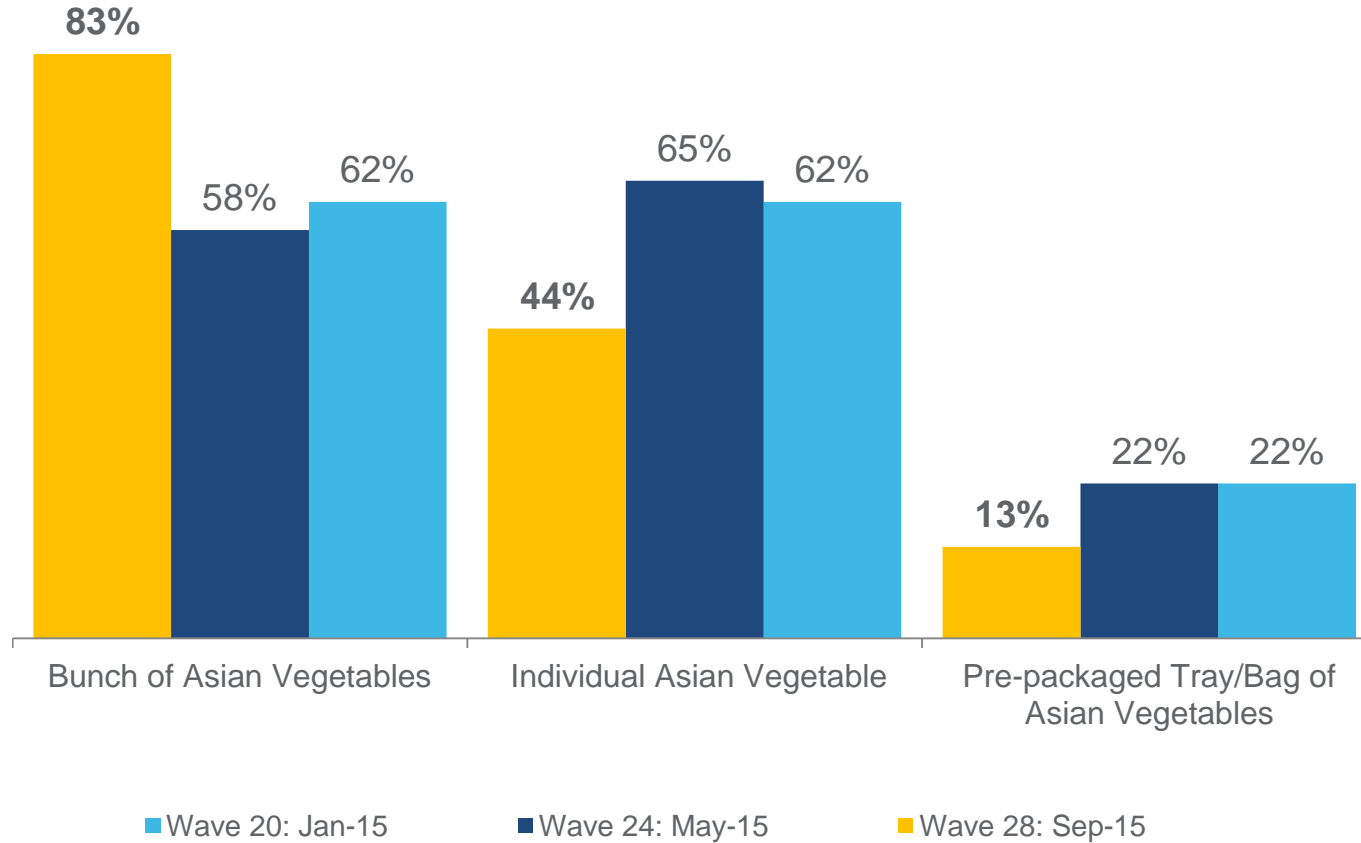
On average, consumers perceive Asian Vegetables to be good value for money (**6.8/10**), consistently increasing upon waves.

- 6.6/10, Wave 20
- ▼ 6.7/10, Wave 24

Q3. How much <commodity> do you typically purchase when you shop for it?
 Q3b. To the best of your memory how much did this cost on your most recent typical purchase?
 Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
 Sample Wave 20 N=317, Wave 24 N=311, Wave 28 N=310



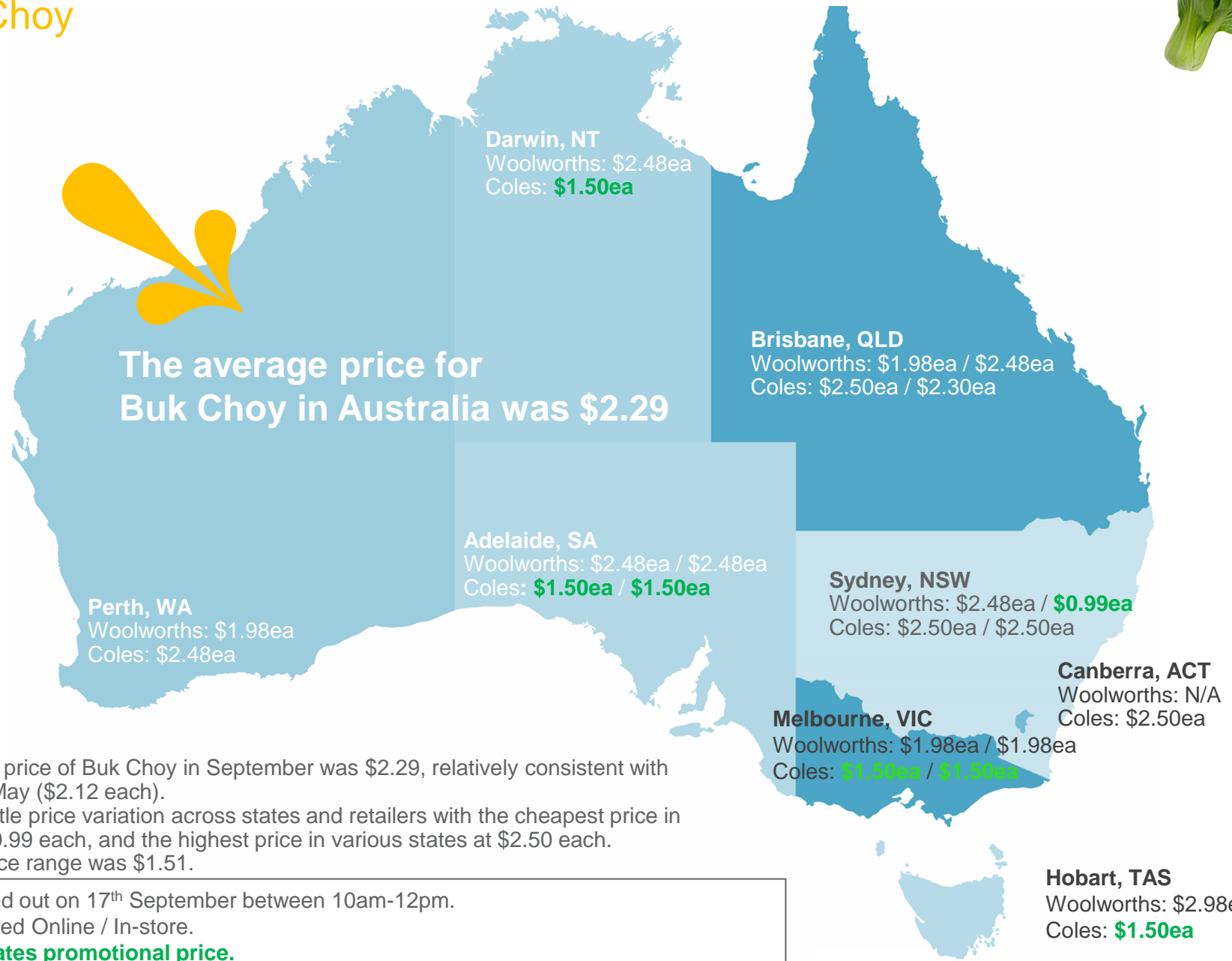
There was a significant increase in purchase of bunched Asian vegetables, and a substantial decrease in individual formats this wave.



Q4b In what fresh formats do you typically purchase Asian vegetables (bok choy, choy sum etc.)?
Sample Wave 20 N=317, Wave 24 N=311, Wave 28 N=310

Online and In-store Commodity Prices.

Buk Choy



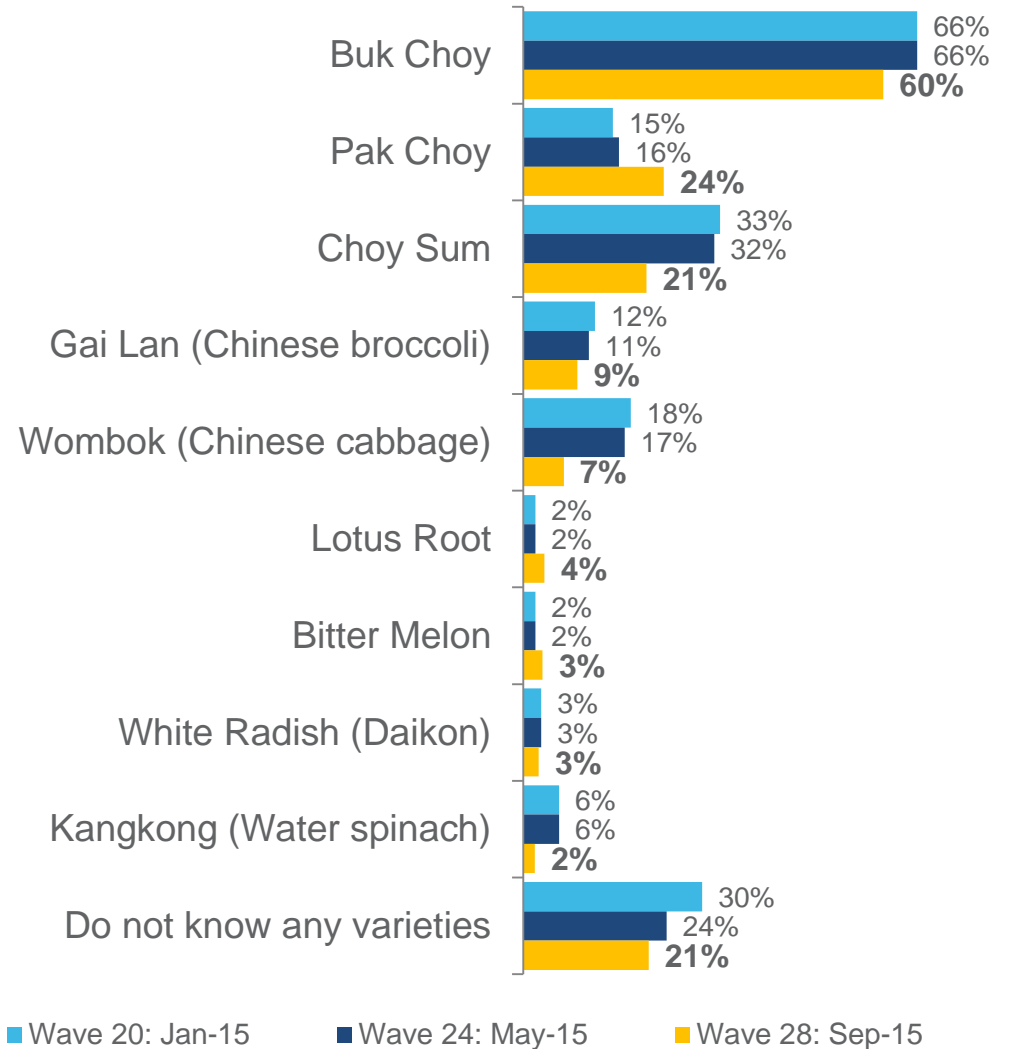
- The average price of Buk Choy in September was \$2.29, relatively consistent with prices from May (\$2.12 each).
- There was little price variation across states and retailers with the cheapest price in Sydney at \$0.99 each, and the highest price in various states at \$2.50 each.
- The retail price range was \$1.51.

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



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

Buk Choy and Pak Choy have the greatest recall amongst consumers, with Choy Sum decreasing in awareness this wave.



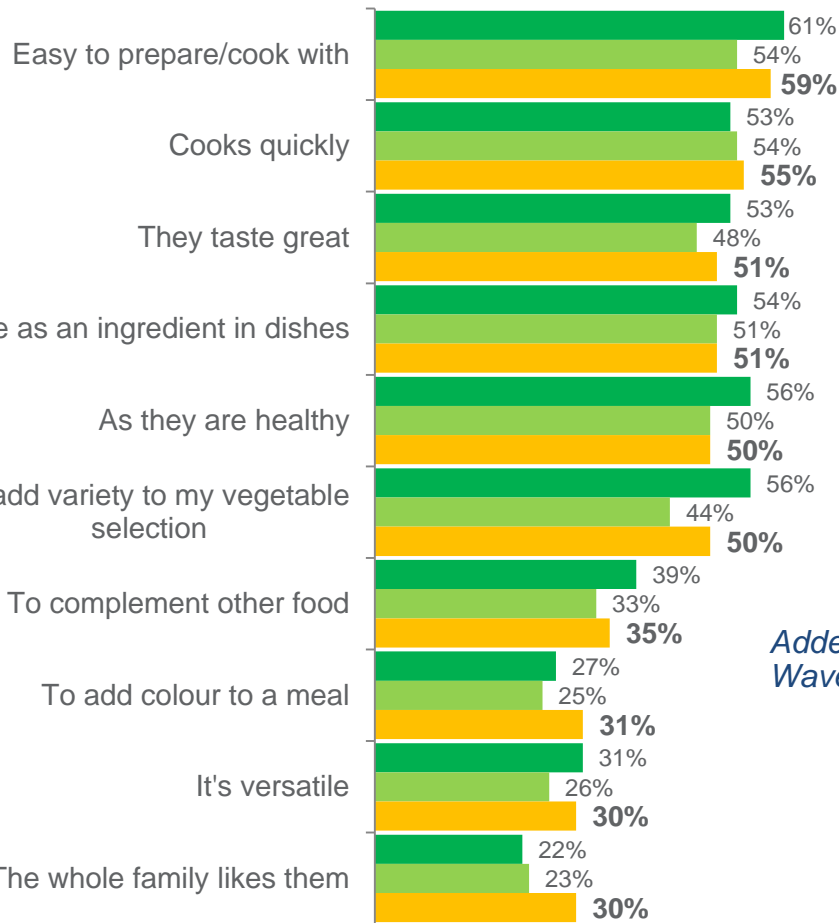
Q6a. What varieties/types of <commodity> are you aware of? (unprompted)
Sample Wave 20 N=317, Wave 24 N=311, Wave 28 N=310



Ease of preparation and short cooking times remain the main drivers of purchase. This wave sees a relatively large increase in short shelf life and not wanting to waste any as the key barriers to purchase.

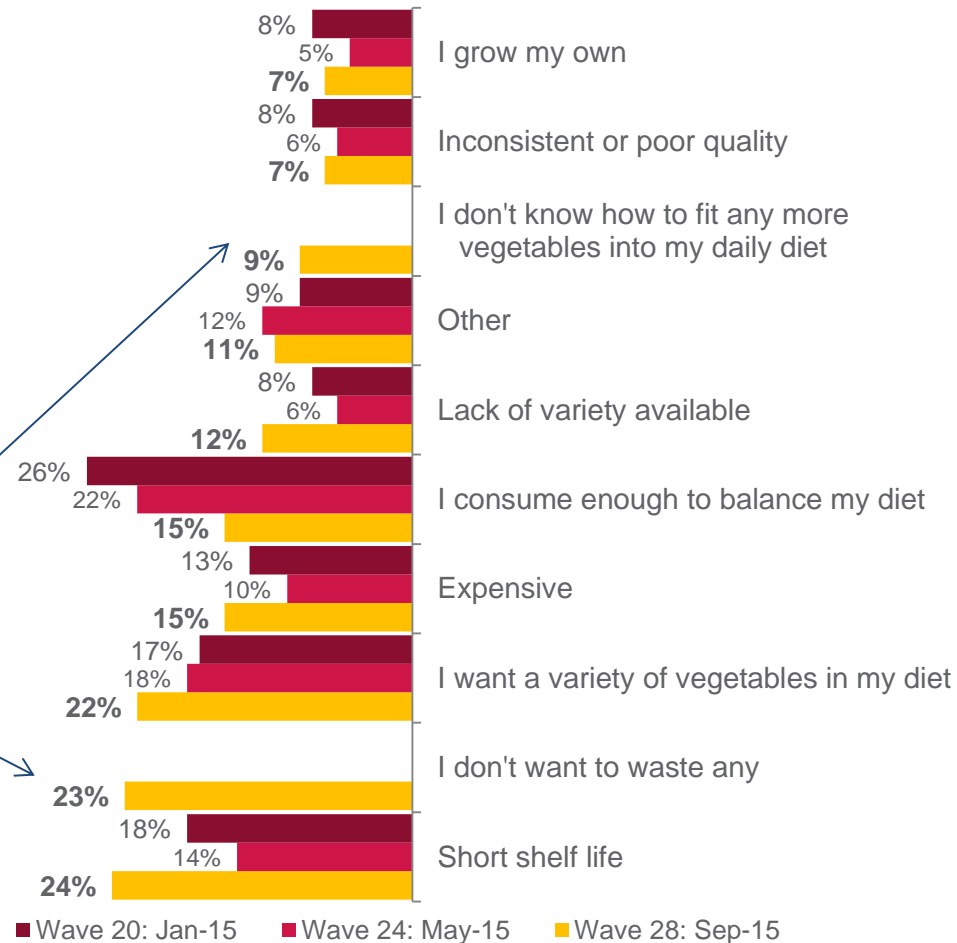


Triggers



■ Wave 20: Jan-15 ■ Wave 24: May-15 ■ Wave 28: Sep-15

Barriers



Added in Wave 28

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 20 N=317, Wave 24 N=311, Wave 28 N=310



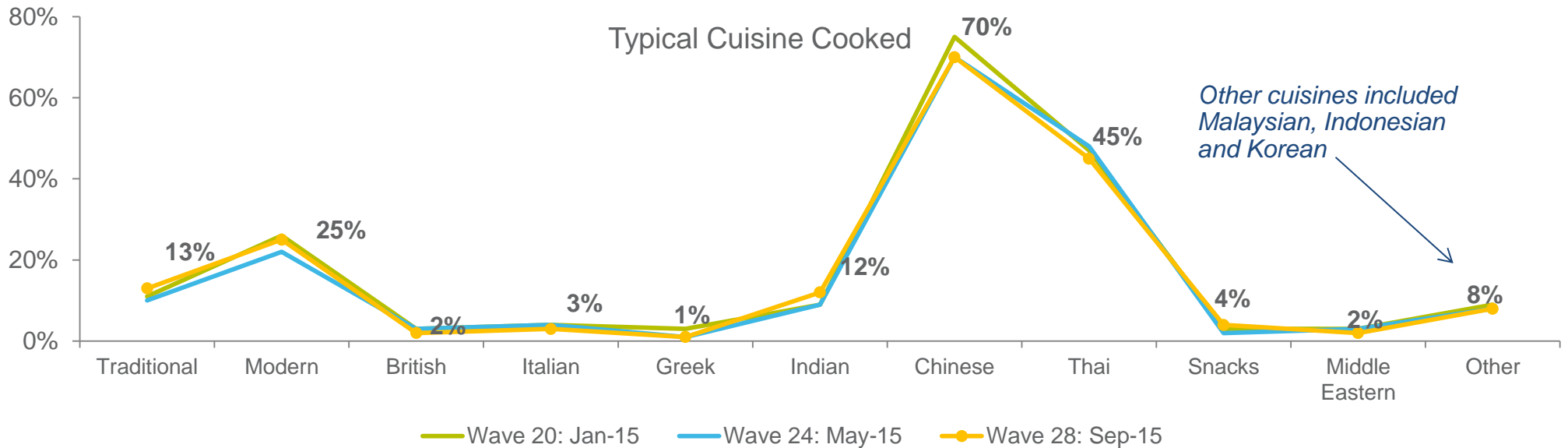
Asian vegetables are generally eaten at dinner time, on both weekdays and weekends.

Consumers are cooking Chinese, Thai and Vietnamese cuisines, consistent with previous waves.



Top 5 Consumption Occasions

Wave 28	
Dinner	72%
Family Meals	57%
Quick Meals	49%
Weekday Meals	48%
Weekend Meals	39%



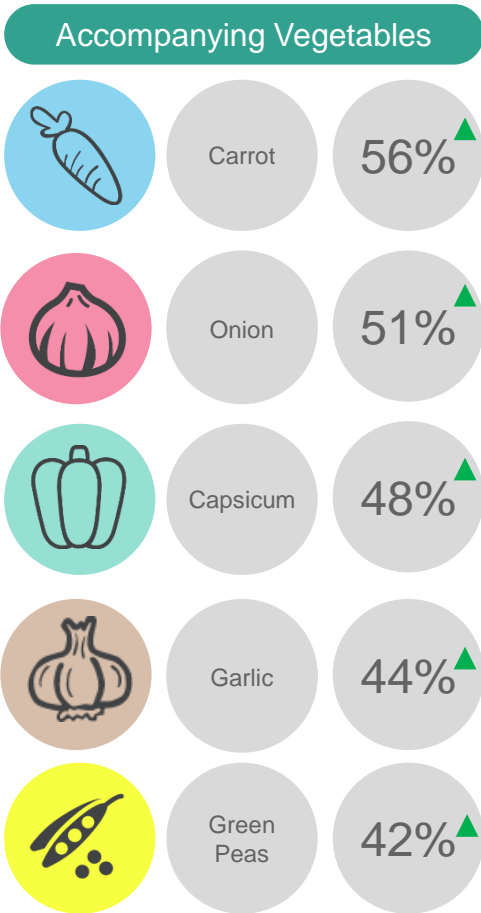
Q10. What cuisines do you cook/consume that use <commodity>?
 Q11. Which of the following occasions do you typically consume/use <commodity>?
 Sample Wave 20 N=317, Wave 24 N=311, Wave 28 N=310



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



Cooking preferences remain consistent between waves. Consumers typically stir fry Asian vegetables. There has been a large increase in frying in this wave. Asian vegetables are cooked with carrots, onion and capsicums. This wave also sees a substantial increase in green peas as an accompanying vegetable.



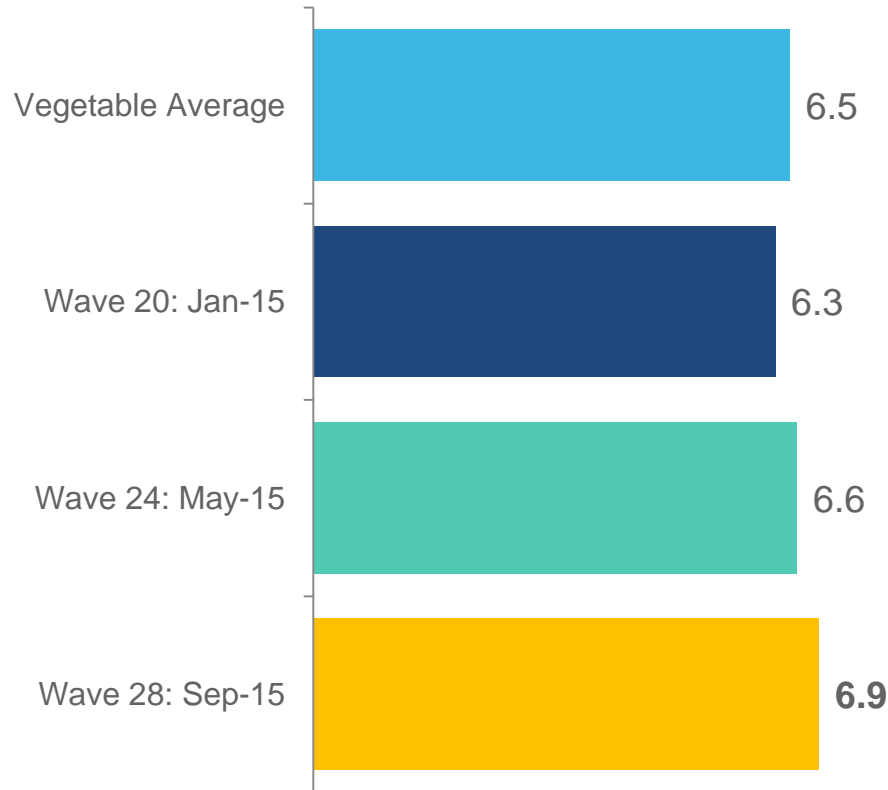
Top Cooking Styles

	Wave 20	Wave 24	Wave 28
Stir frying	80%	78%	82%
Steaming	44%	42%	45%
Soup	23%	24%	26%
Sautéing	16%	22%	23%
Boiling	18%	16%	18%
Frying	4%	1%	17%
Raw	13%	8%	13%
Microwave	9%	7%	10%
Slow Cooking	5%	5%	10%
Roasting	3%	5%	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 20 N=317, Wave 24 N=311, Wave 28 N=310



Asian vegetable provenance has increased in importance across waves, sitting above the Vegetable Average.



Q14. When purchasing <commodity>, how important is Provenance to you?
Q15. And when purchasing <commodity>, how important is that it is grown in Australia?
Mean scores out of 10.
Sample Wave 20 N=317, Wave 24 N=311, Wave 28 N=310



Trends: Asian Vegetables



Asian Vegetables Global NPDs

July - September 2015

There were 53 launches in the last three months that contained Asian Vegetables as an ingredient. Products are primarily launched in Europe and Asia Pacific regions. The main categories for launches are meals, sauces & seasonings, and snacks.





Asian Vegetables Product Launches: Last 3 Months (July - September 2015) Summary

- There were 53 products launched over the last three months that contained Asian Vegetables as an ingredient.
- There were 8 products launched in Australia this wave, the launches in any countries.
- Europe (40%) and Asia Pacific (30%) were the main regions for launches.
- Flexible formats remained the most common type of packaging (32%),
- The top category launches were meals (30%), sauces and seasonings (17%) and snacks (15%).
- Popular claims used were around no additives/preservatives (40%), ease of use (40%) and low/no/reduced allergen (30%).
- The most innovative Asian Vegetable product was the Asian Home Gourmet Vietnamese Black Pepper Beef Meal Kit in Australia.



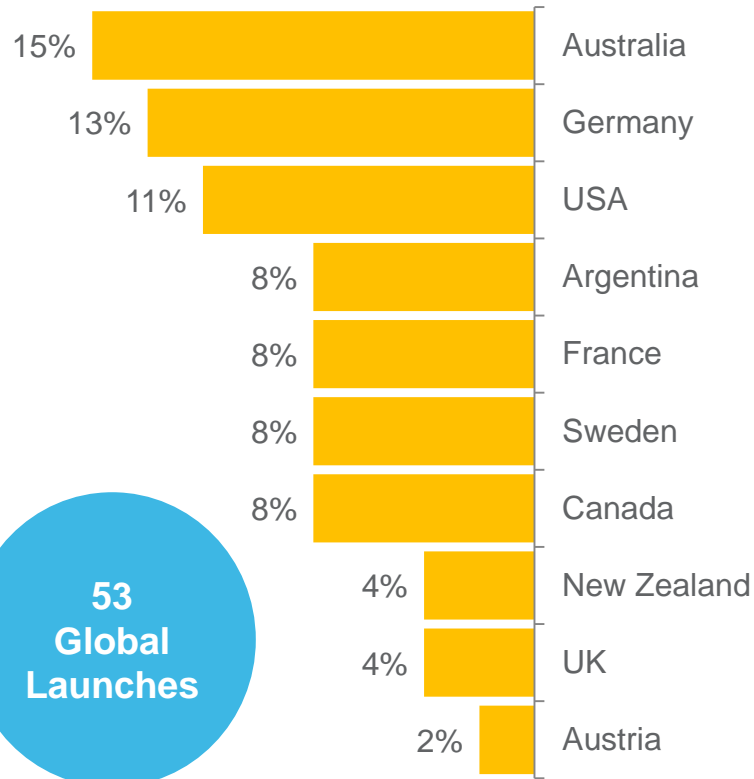
Source: Mintel (2015)



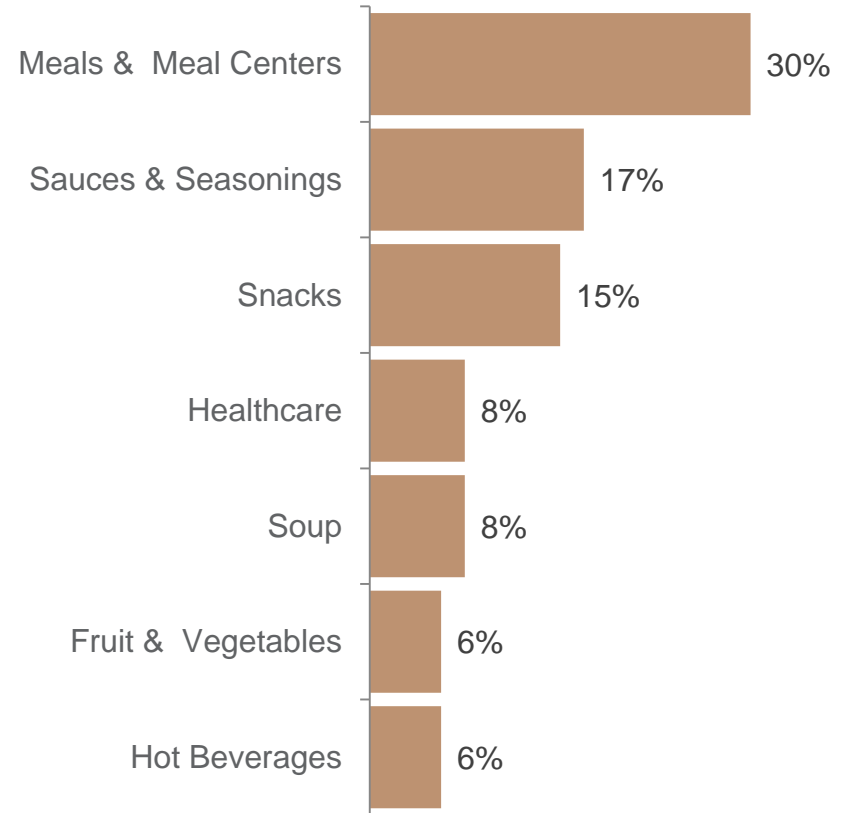


Australia and Germany are the key countries for launches. The main categories for Asian Vegetable products are meals.

Top Launch Countries



Top Launch Categories





Innovative Asian Vegetables Launches: L3M (July - September 2015)

Maggi Magic Asia Instant Curry Noodle Cup (Austria)

Maggi Magic Asia Instant Curry Noodle Cup can be prepared in four minutes by adding boiling water and mixing in enclosed vegetable-herbs mix and seasoning. This instant noodle snack with Asian spices retails in a 65g pack, featuring the Nestlé Good Food, Good Life logo.



Claims:
Time/Speed

Rhythm Superfoods Asian Citrus Broccoli Bites (USA)

Rhythm Superfoods Asian Citrus Broccoli Bites are made with broccoli, which is full antioxidants, vitamins and minerals and is said to be a powerhouse of nutrition and health benefits. This gluten- and GMO-free snack is a good source of fiber and protein.



Claims:
Low/No/Reduced Allergen, GMO-Free, High/Added Fiber, Vegan, Social Media, Gluten-Free, No Animal Ingredients, Antioxidant

Bofrost Asian Chop Suey Pan (Germany)

Bofrost Asia Pfanne "Chop Suey" (Asian Chop Suey Pan) comprises pre-cooked ribbon noodles, cooked and seasoned chicken fillet pieces, and a vegetable mix in a slightly sweetish Asian style sauce. The ready meal is microwaveable and retails in a 1000g pack.



Claims:
Ease of Use, Microwaveable

Green Grocer's Asian Vegetable Mix (France)

Green Grocer's Poêlée à l'Asiatique (Asian Vegetable Mix) can be fried from frozen in seven to eight minutes. The product retails in a 1kg pack.



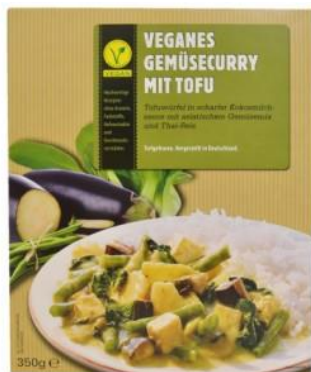
Claims:
N/A



Innovative Asian Vegetables Launches: L3M (July - September 2015)

Frankenberg Vegan Vegetable Curry with Tofu (Germany)

Frankenberg Veganes Gemüsecurry mit Tofu (Vegan Vegetable Curry with Tofu) comprises tofu cubes in hot coconut milk sauce with an Asian vegetable mix and Thai rice. It is made to a high quality recipe and is free from flavourings, colourings, yeast extracts and flavour enhancers. This vegan product is microwavable and retails in a 350g pack.



Claims:
No Additives/Preservatives,
Low/No/Reduced Allergen, Vegan,
Microwavable, No Animal Ingredients,
Vegetarian

Sunshine Tom Yum Chicken Pizza (Singapore)

Sunshine Tom Yum Chicken Pizza is described as a crispy thin crust pizza with a fiery Asian twist. It is topped with chicken chunks, green capsicum, onions, mushrooms and mozzarella cheese on a unique tom yum base. The halal certified product contains no trans fat, bakes from frozen in 10 minutes and retails in a 410g pack.



Claims:
Halal, Low/No/Reduced Transfat

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

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 Asian Vegetables Launches: L3M (July - September 2015)

Sansibar Asian Seasoning Blend (Germany)

Sansibar Asiagewürz Gewürzzubereitung (Asian Seasoning Blend) is now available. The product has a spicy and sweet flavour that is ideal to give an Asian note to every wok dish as well as to meat, fish, vegetables and sauces, and retails in a 40g jar.



Claims:
N/A

Birds Eye Steamfresh Protein Blends Asian Style Meal (USA)

Birds Eye Steamfresh Protein Blends Asian Style Meal is a blend of whole grains and fresh frozen vegetables including shelled edamame, carrots, red peppers and sauce. This microwavable product is said to cook perfectly in the bag, and retails in a 11.7-oz. pack.



Claims:
Convenient Packaging, Economy

Iglo Gerührt & Verführt Asian Wok Vegetable Mix (Germany)

Iglo Gerührt & Verführt Asia Wok Gemüse-Mix (Asian Wok Vegetable Mix) has been relaunched, being previously available under the Iglo Gemüse-Ideen brand. The microwavable product, now refined with Asian herbs, is free from added flavourings and flavour enhancers and suitable for vegans.



Claims:
No Additives/Preservatives, Vegan, Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Microwavable, No Animal Ingredients

Minh Mini White Meat Chicken Egg Rolls (Puerto Rico)

Minh Mini White Meat Chicken Egg Rolls have been repackaged and are now available in a 48.5-oz. twin pack containing two bags of 25 units each and a sweet and sour sauce. The egg rolls are made with fresh carrots and cabbage, traditionally prepared Asian-style wrappers, tender and juicy white meat chicken, and savoury and delicious classic Asian style spices.



Claims:
No Additives/Preservatives, Microwavable



Australian Asian Vegetables Launches: L3M (July - September 2015)

Hansells Pho Soup with Konjac Noodles

Hansells Pho Soup with Konjac Noodles is a traditional Vietnamese soup infused with aromatic herbs and spices with low calorie Konjac noodles and sliced beef. The 100% natural ready to serve soup is free from preservatives, dairy and gluten, and made from the finest natural ingredients. According to the manufacturer, konjac is an Asian root vegetable grown in Southeast Asia with a similar texture to potato but without the starchiness, and noodles made from konjac are high in fiber, low in calories and carbohydrates and for a perfect light meal option.



Claims:

No Additives/Preservatives, All Natural Product, Low/No/Reduced Allergen, Low/No/Reduced Calorie, Low/No/Reduced Carb, High/Added Fiber, Slimming, Microwaveable, Ease of Use, Gluten-Free

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

Asian Home Gourmet Vietnamese Black Pepper Beef Meal Kit

Asian Home Gourmet Vietnamese Black Pepper Meal Kit has a medium heat level and contains no artificial colour, flavours or added MSG. It comprises rice, tomato rice paste, black pepper sauce and fish sauce, and simply requires the addition of lean beef, vegetable oil, baby cos lettuce and tomato to be prepared in 30 minutes. The product retails in a 428g partially recyclable pack providing four servings.



Claims:

Ease of Use, No Additives/Preservatives, Ethical - Environmentally Friendly Package



Capsicums.



Both purchase and consumption frequency increased this wave, returning to the level in Wave 20.

Capsicum is generally purchased from mainstream and specialist retailers, with purchase from markets consistently trending upwards.

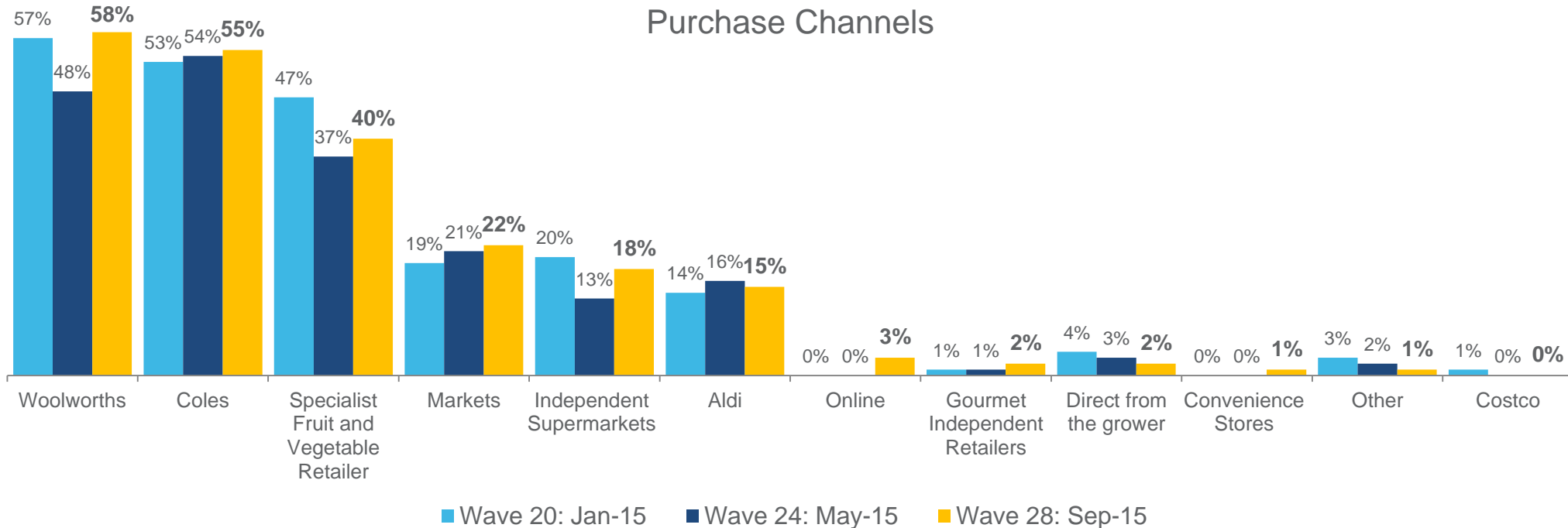
Average Purchase 4.1 times per month

Average Consumption 10.3 times per month

▼ 4.0 times, Wave 20
▼ 3.5 times, Wave 24

▲ 10.5 times, Wave 20
▼ 9.2 times, Wave 24

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 20 N=353, Wave 24 N=307, Wave 28 N=319



Average Spend and Price Sensitivity



Average weight of purchase

The average consumer typically purchased **610g** of Capsicum in September 2015, which is consistent with the previous wave.

▲ 640g, Wave 20
— 610g, Wave 24



Recalled last spend

The average recalled last spend for Capsicum was **\$3.80**, which has slightly increased since Wave 24.

▲ \$3.90, Wave 20
▼ \$3.60, Wave 24



Value for money

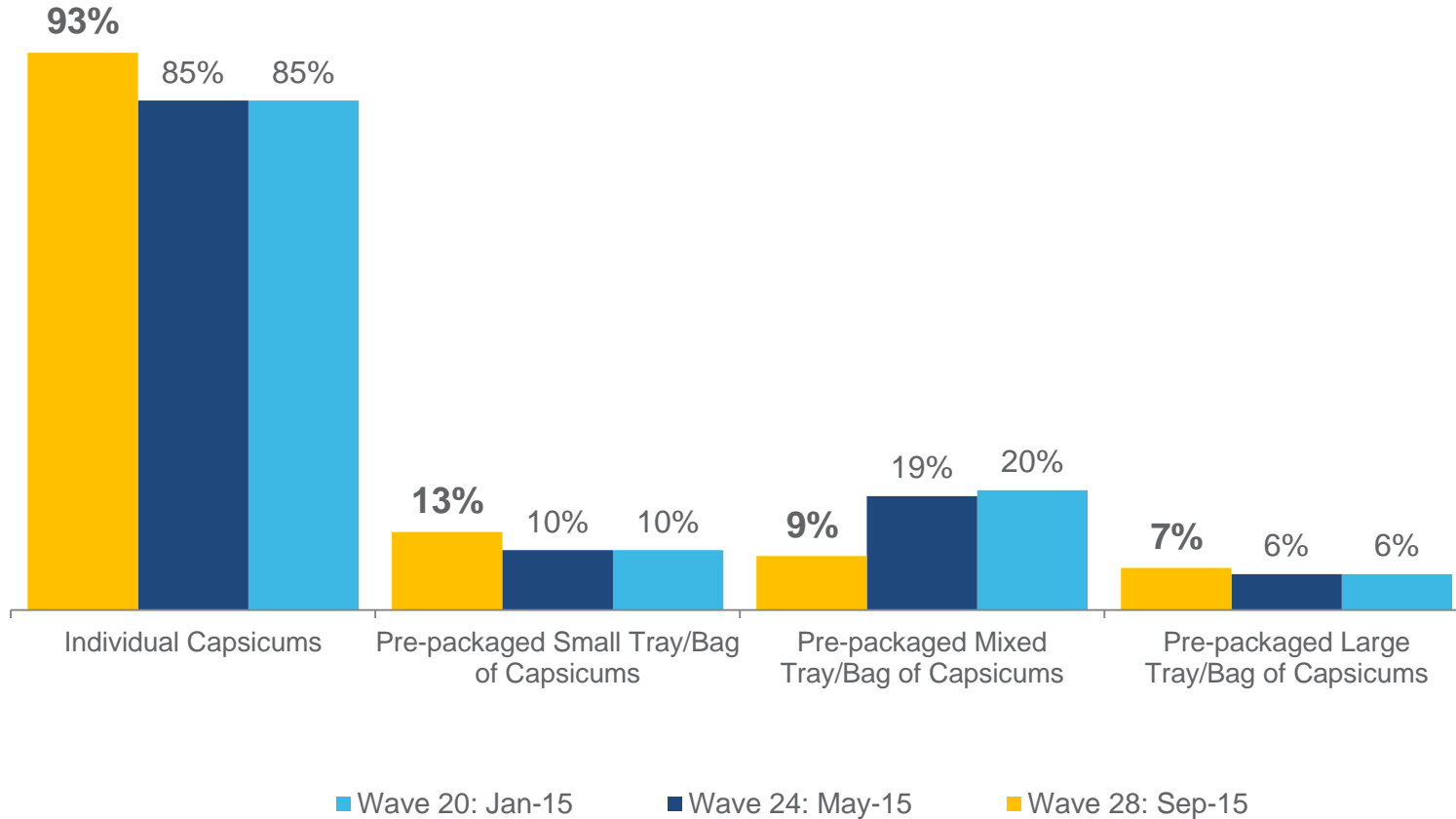
On average, consumers perceived Capsicum to be fair value for money **(6.0/10)**, slightly higher than previous waves.

▼ 5.9/10, Wave 20
▼ 5.7/10, Wave 24

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 20 N=353, Wave 24 N=307, Wave 28 N=319



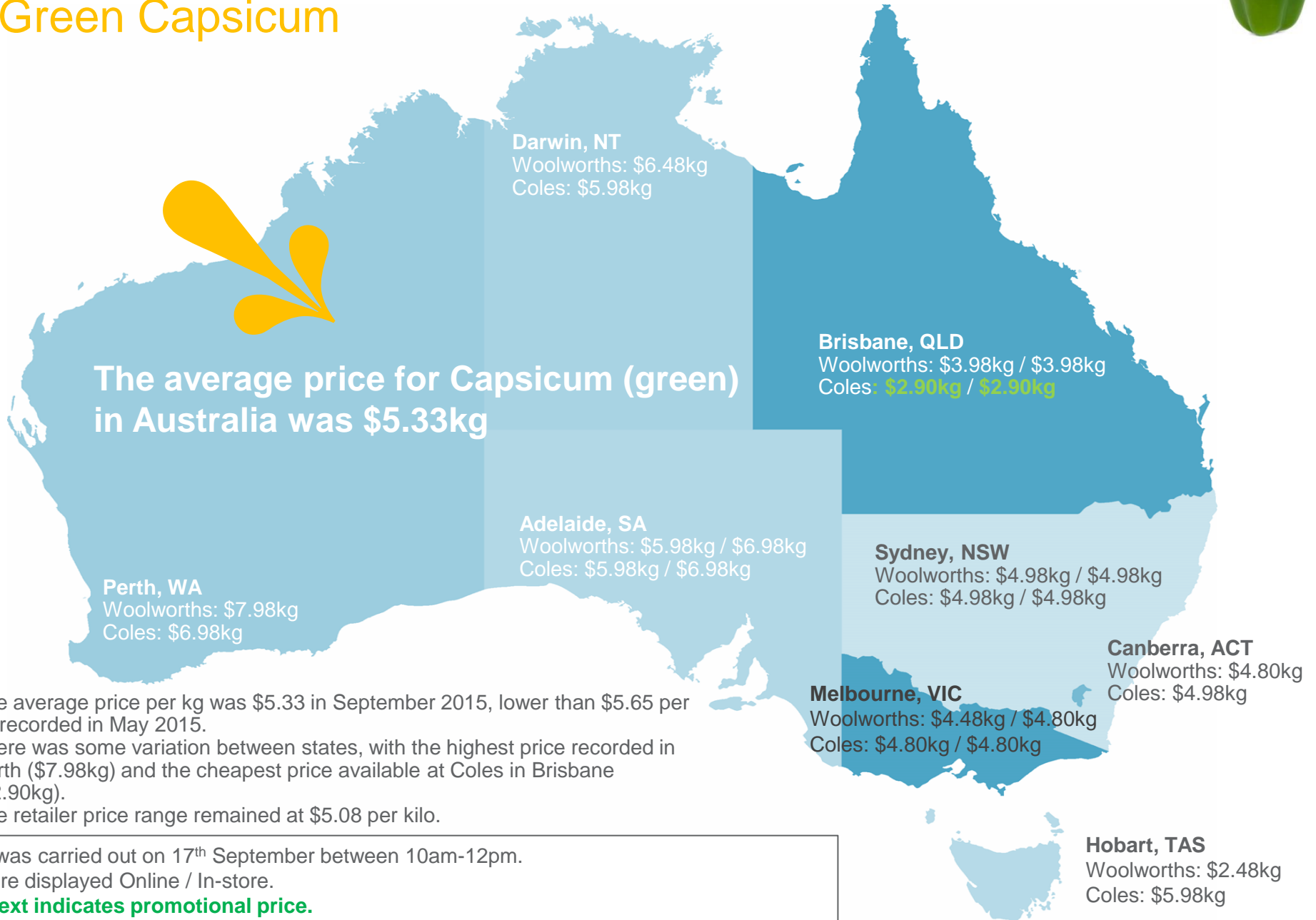
Individual capsicums remain the key format for purchase, consistent with previous waves. This month saw a decline in the purchase of mixed trays of capsicums.



Q4b. In what fresh formats do you typically purchase Capsicums?
Sample Wave 20 N=353, Wave 24 N=307, Wave 28 N=319

Online and In-store Commodity Prices

Green Capsicum



The average price for Capsicum (green) in Australia was \$5.33kg

- The average price per kg was \$5.33 in September 2015, lower than \$5.65 per kg recorded in May 2015.
- There was some variation between states, with the highest price recorded in Perth (\$7.98kg) and the cheapest price available at Coles in Brisbane (\$2.90kg).
- The retailer price range remained at \$5.08 per kilo.

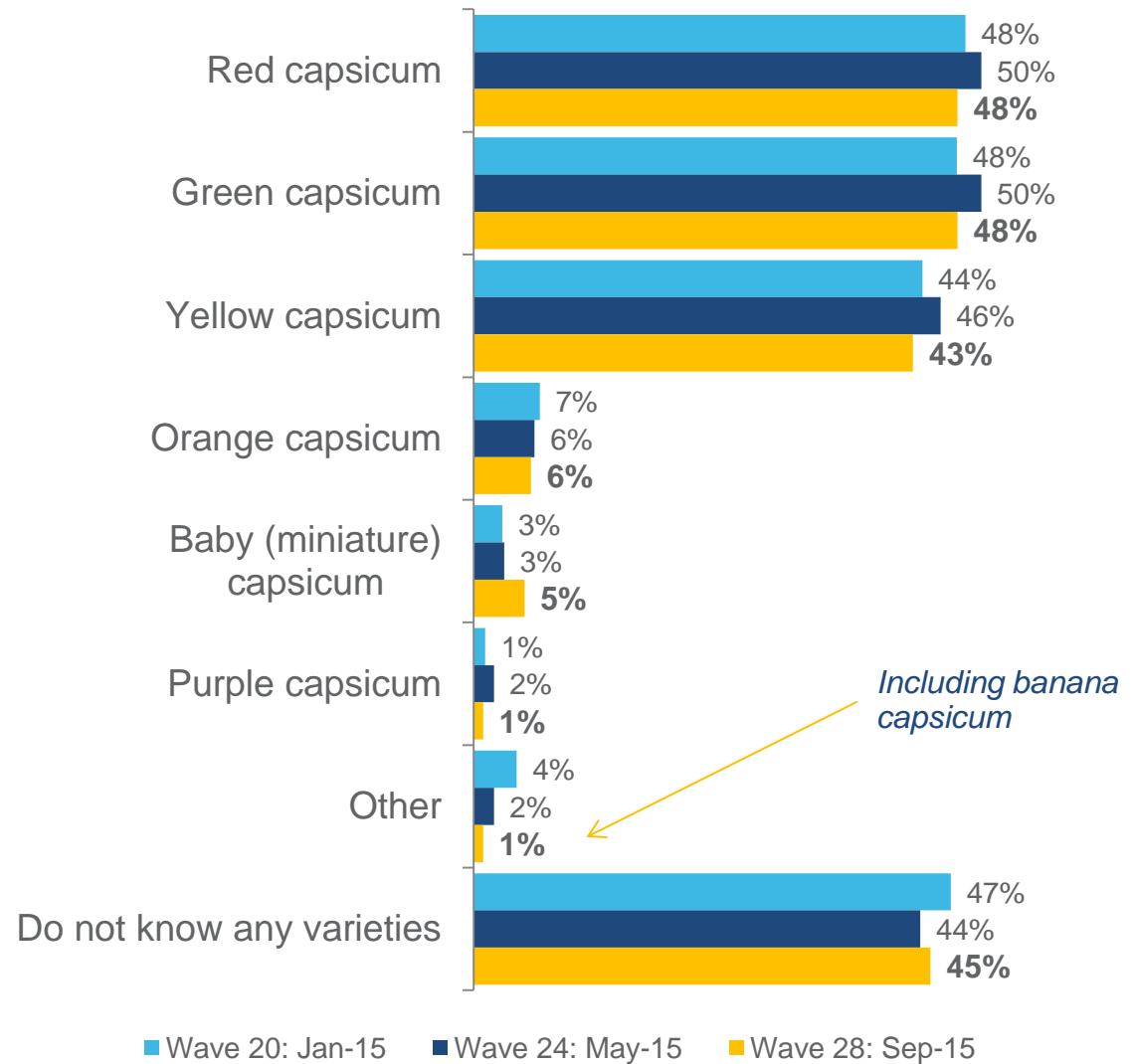
Pricing was carried out on 17th September between 10am-12pm.
Prices are displayed Online / In-store.

Green text indicates promotional price.



Red, yellow and green capsicums have the greatest level of recall, consistent with previous waves.

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



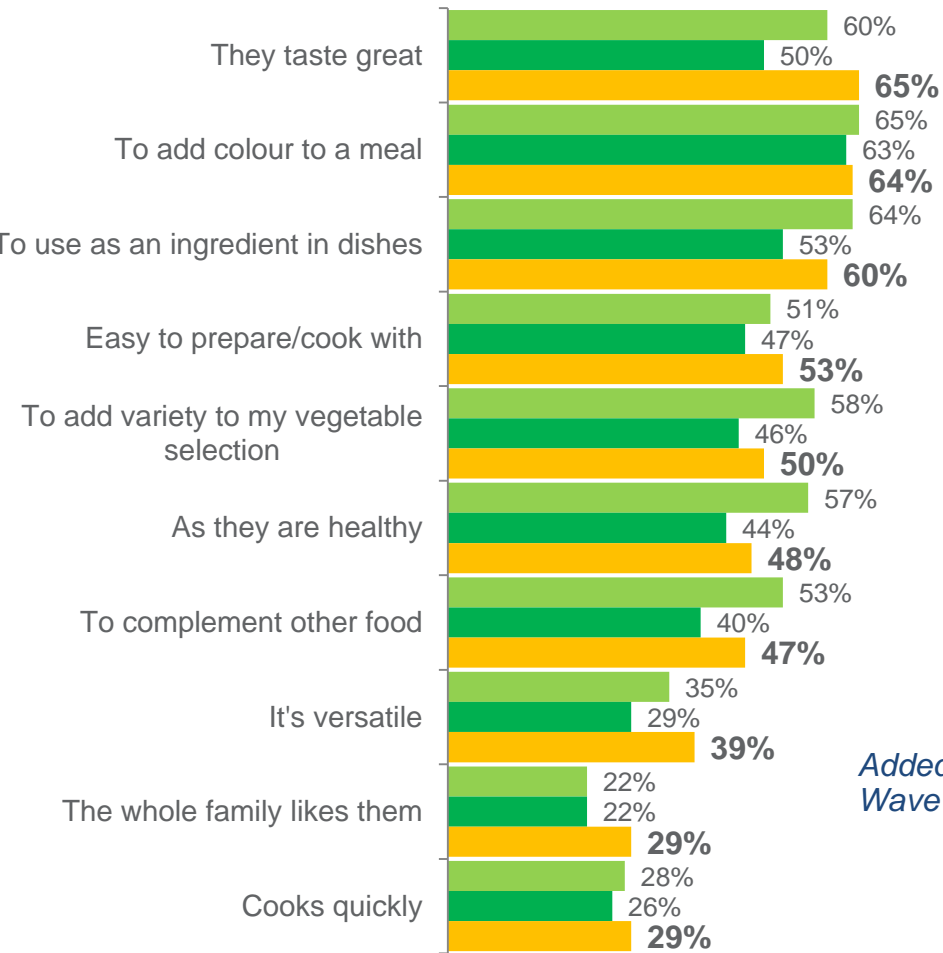
Q6a. What varieties of <commodity> are you aware of? (unprompted)
Sample Wave 20 N=353, Wave 24 N=307, Wave 28 N=319



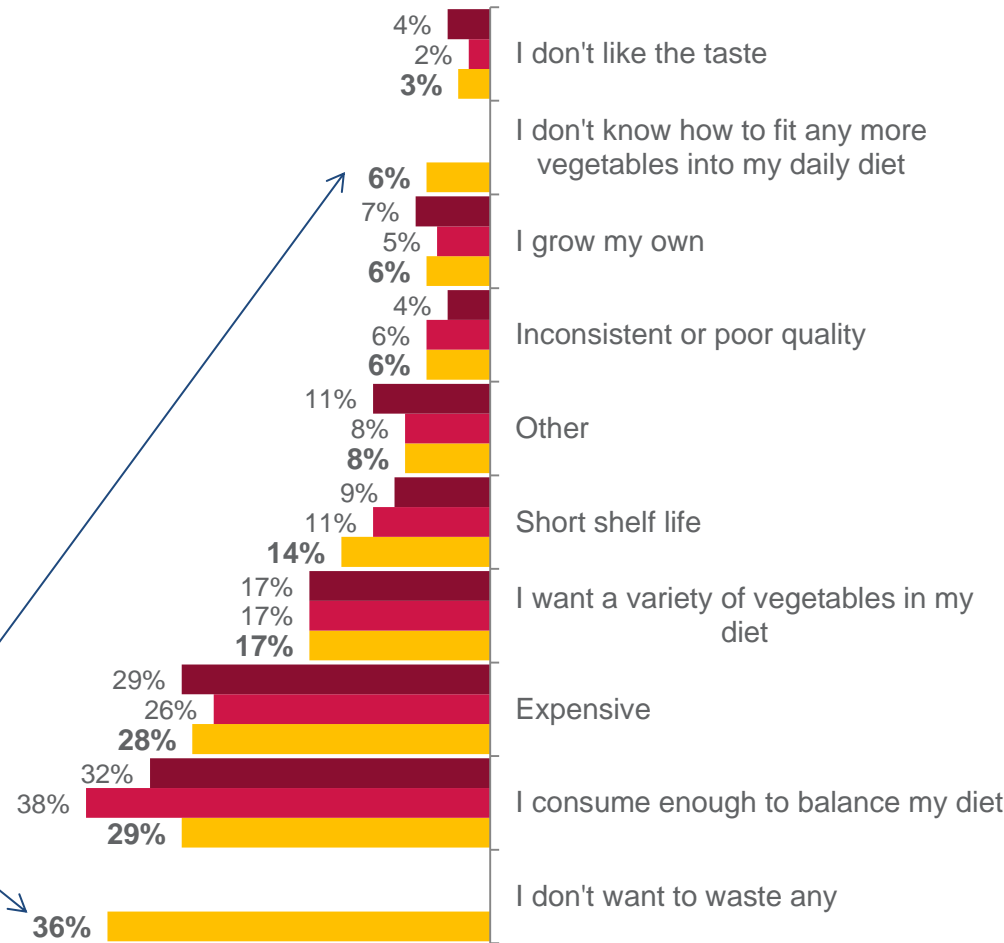
The key triggers to purchase were taste and colour. The main barriers to purchase included not wanting to waste any and already consuming enough vegetables. Short shelf life has continuously trended upwards as a barrier to purchase.



Triggers



Barriers



Added in Wave 28

■ Wave 20: Jan-15 ■ Wave 24: May-15 ■ Wave 28: Sep-15

■ Wave 20: Jan-15 ■ Wave 24: May-15 ■ Wave 28: Sep-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 20 N=353, Wave 24 N=307, Wave 28 N=319



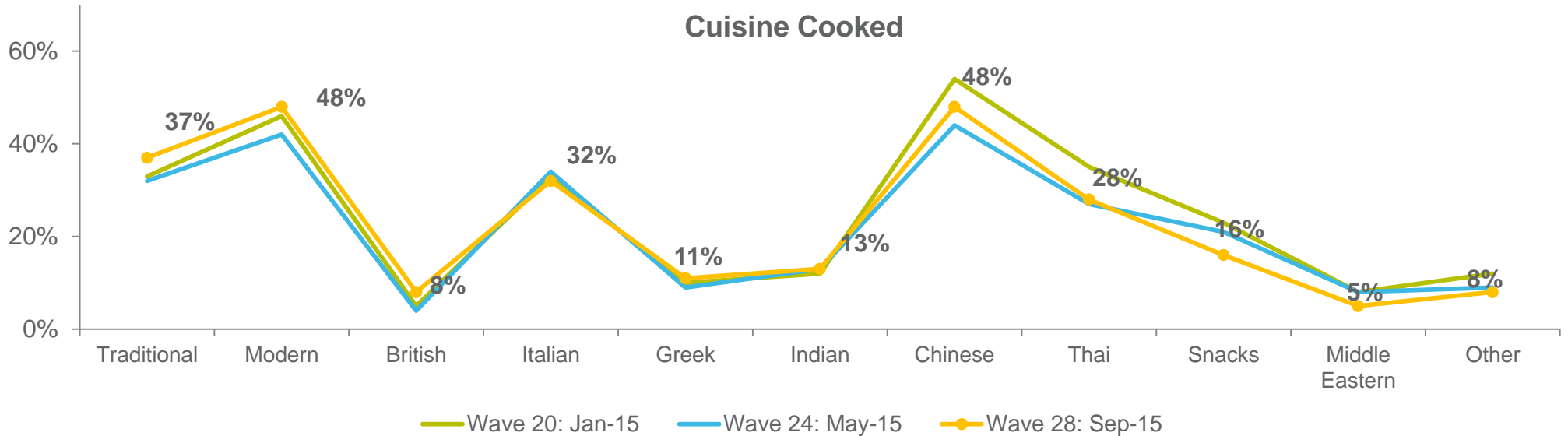
Capsicums are most frequently cooked in Asian and Australian cuisine, particularly Chinese and Modern Australian.

Dinner is the main consumption occasion, both on weekdays and on the weekend.



Top 5 Consumption Occasions

Wave 28	
Dinner	74%
Family Meals	58%
Quick Meals	56%
Weekday Meals	45%
Weekend Meals	44%



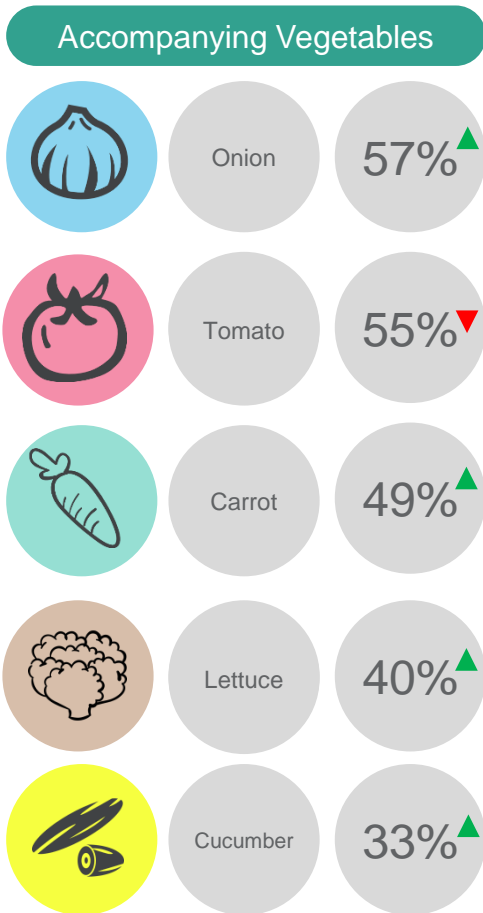
Q10. What cuisines do you cook/consume that use <commodity>?
 Q11. Which of the following occasions do you typically consume/use <commodity>?
 Sample Wave 20 N=353, Wave 24 N=307, Wave 28 N=319



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



Capsicum is typically served with onions, tomatoes and carrots. On trend with Asian cuisine, the main cooking technique for capsicum is stir frying. Capsicum was also consumed raw by over half of the respondents.

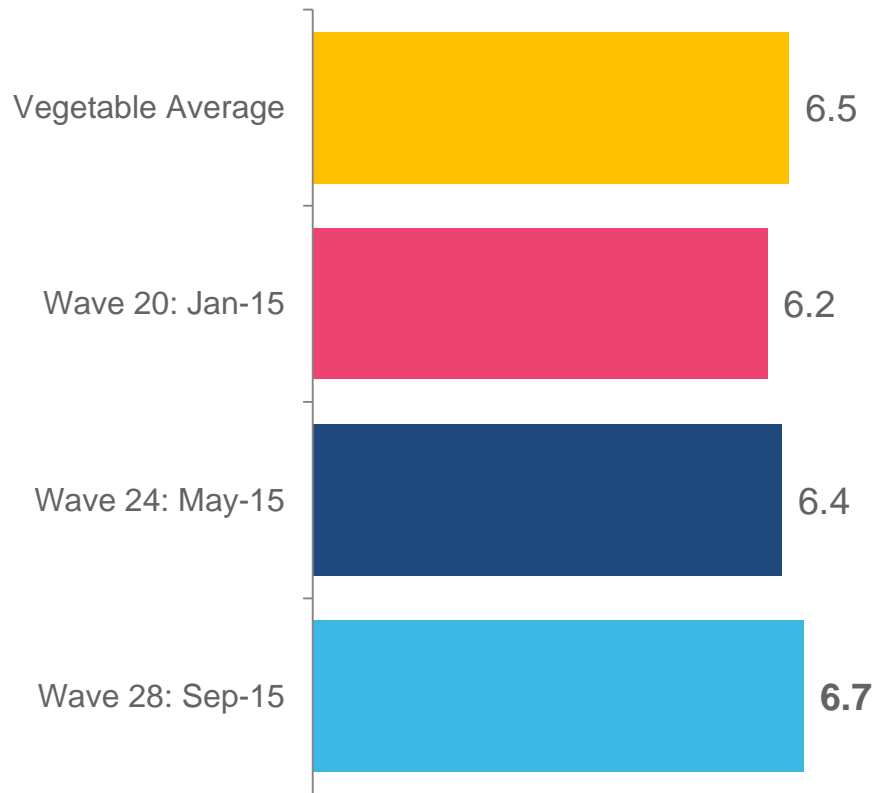


Top 10 Cooking Styles			
	Wave 20	Wave 24	Wave 28
Stir frying	75%	69%	73%
Raw	56%	52%	53%
Roasting	25%	27%	33%
Frying	1%	1%	29%
Grilling	17%	20%	20%
Baking	15%	18%	20%
Slow Cooking	18%	19%	19%
Sautéing	21%	19%	19%
Soup	12%	17%	14%
Steaming	10%	6%	10%

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 20 N=353, Wave 24 N=307, Wave 28 N=319



The importance of Capsicum provenance has seen an increase on previous waves. Overall, consumers find it very important to know that capsicums are grown in Australia.



Q14. When purchasing <commodity>, how important is Provenance to you?
Mean scores out of 10.
Sample Wave 20 N=353, Wave 24 N=307, Wave 28 N=319

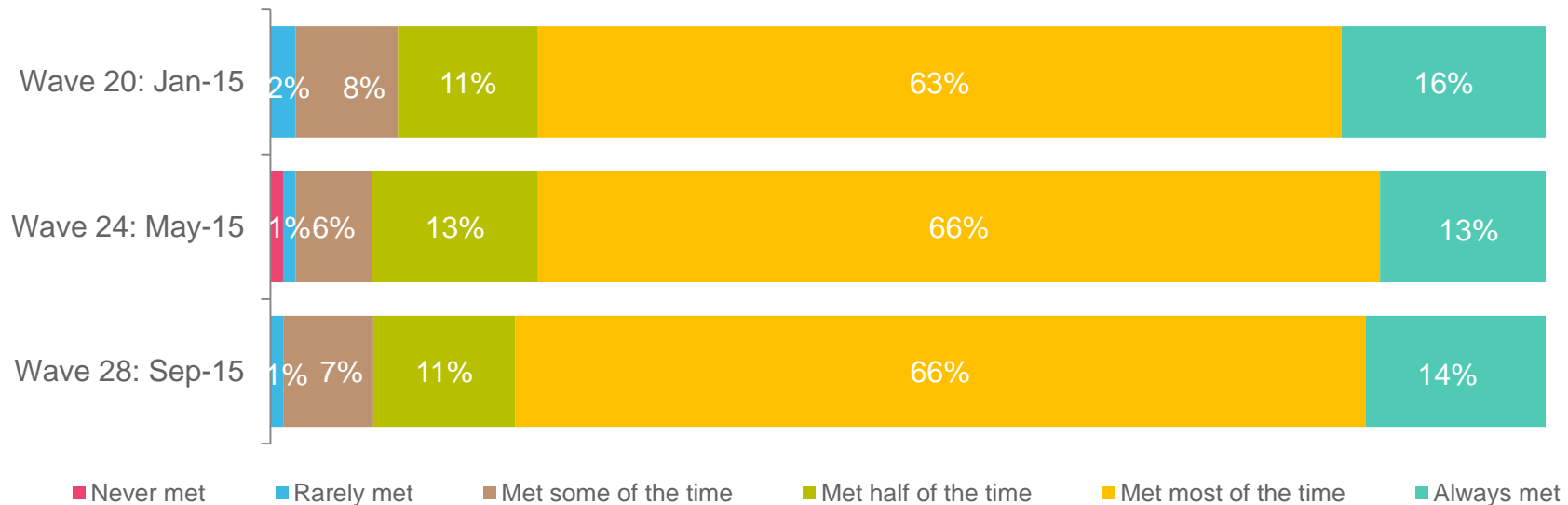


Capsicums are expected to remain fresh for over eight days once purchased, in line with past months. Similarly, expectations of freshness are consistent with previous waves.

Expected to stay fresh for 8.2 days

- 8.2 days, Wave 20
- 8.4 days, Wave 24

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 20 N=353, Wave 24 N=307, Wave 28 N=319



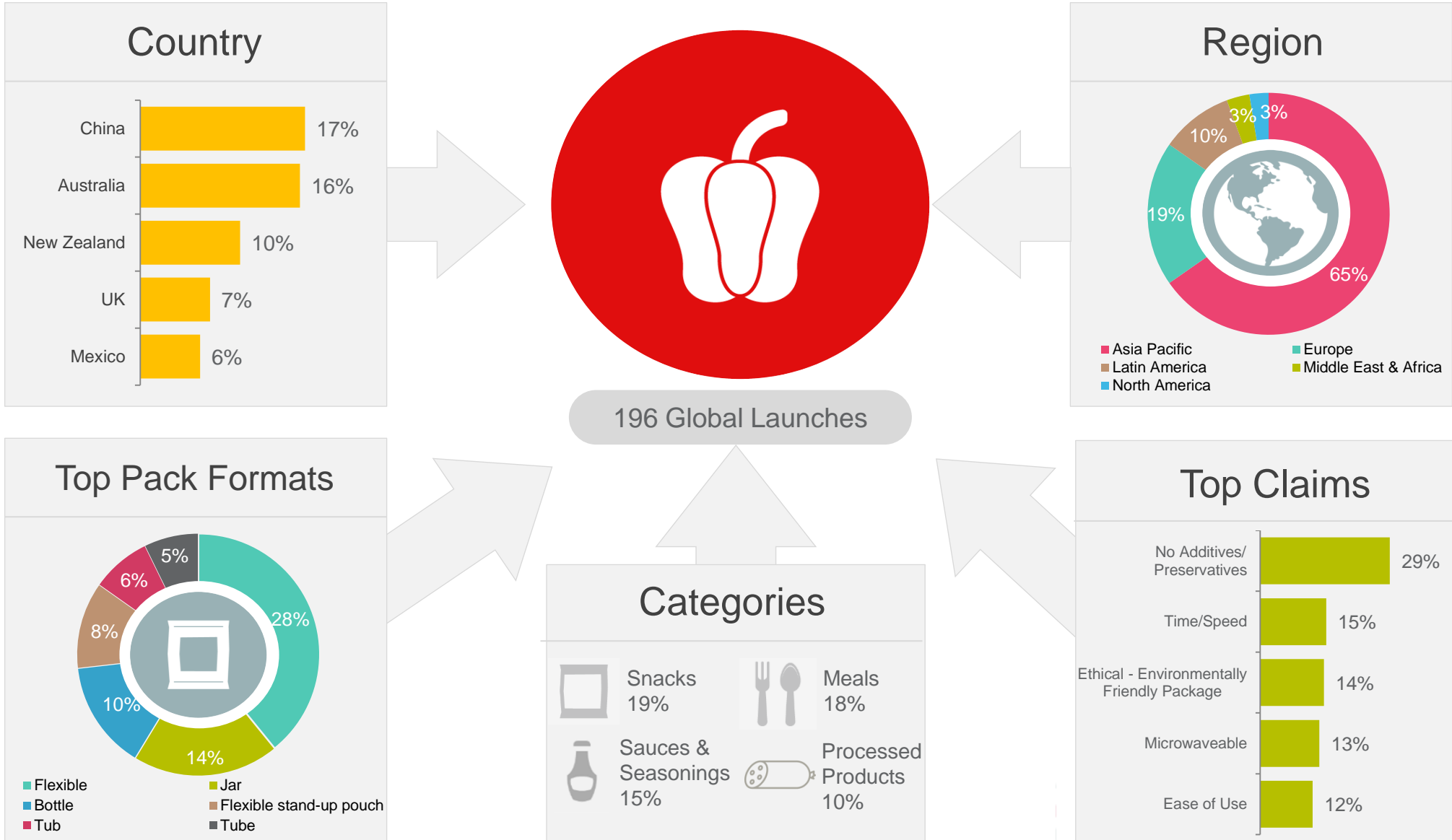
Trends: Capsicums

**Mintel search term was Capsicum*

Capsicum Global NPDs.

July - September 2015

There were 196 products launched over the last three months that contained Capsicum as an ingredient. A large portion of these products were launched in Asia Pacific, specifically China, Australia and New Zealand. New products were snacks, meals, sauces and processed products.





Capsicum Product Launches: L3M (July - September 2015) Summary

- There were 196 products launched globally in the last three months that contained capsicum as an ingredient.
- There were 32 products launched in Australia, a large increase from the 21 launches in the previous wave.
- Top countries for launches were China (17%), Australia (16%), New Zealand (10%) and UK (7%), with two thirds of products launched in the Asia Pacific region.
- Flexible packs (28%) and jars (14%) were the most used forms of packaging over the last three months.
- Snacks (19%) and meals (18%) were the main launch category for products containing capsicum.
- Product claims used were no additives/preservatives (29%), time/speed (15%), microwaveable (14%) and ethical & environmentally friendly packaging (14%).
- The most innovative product was the Healthy Body Top Definition Abs Gel from Mexico (examples of these can be found in the following pages).



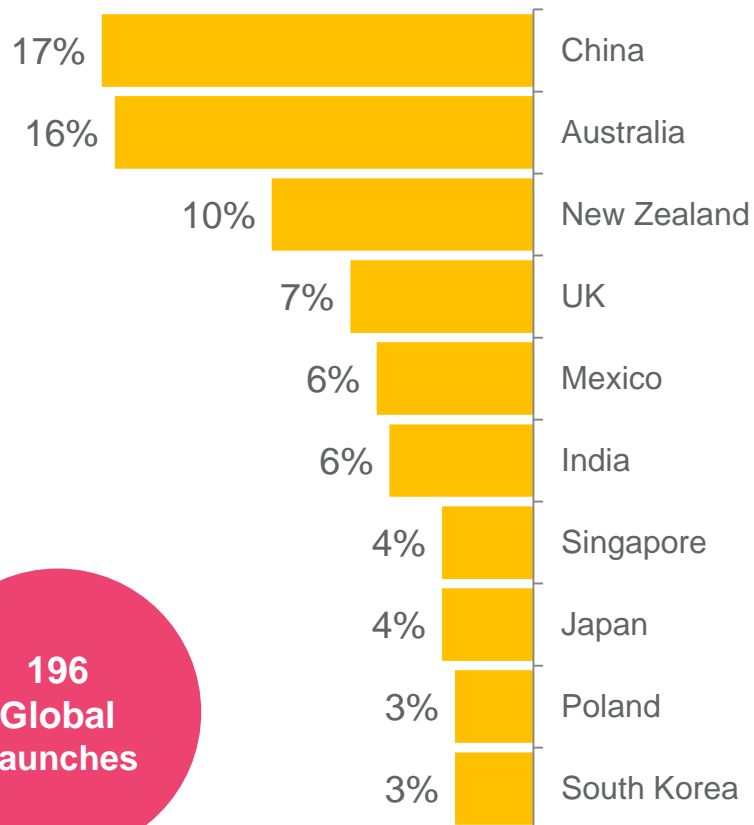
Source: Mintel (2015)



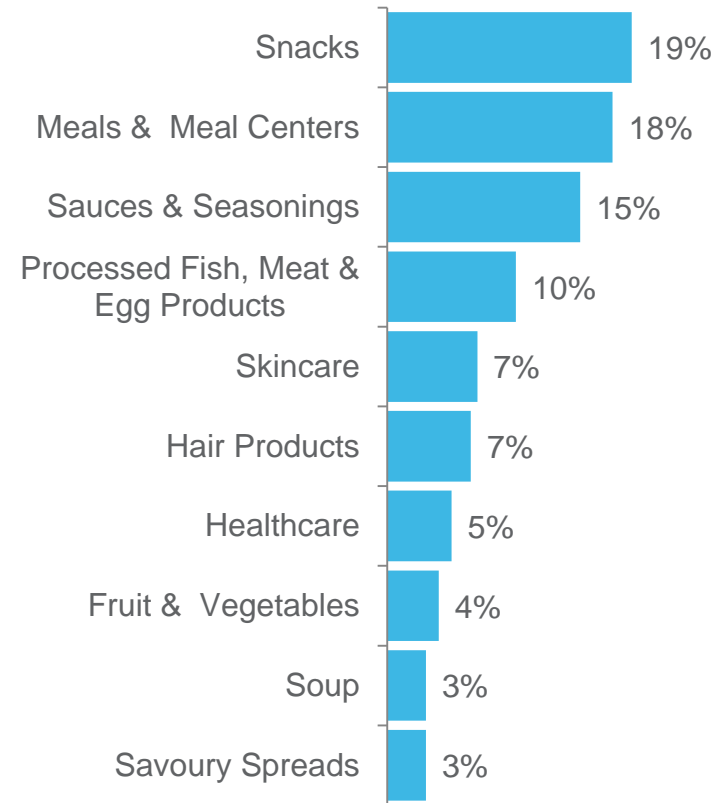


China had the greatest number of capsicum product launches over the last 3 months. Snacks overtook meals & meal centers as the main launch category this wave.

Top Launch Countries



Top Launch Categories



**196
Global
Launches**























The main claims globally were no additives & preservatives, time/speed, and ethical & environmentally friendly packaging.

Flexible packaging and jars are primarily used for capsicum products.

Pack Formats Used

Global		Flexible	28%
		Jar	14%
		Bottle	10%
Asia Pacific		Flexible	29%
		Jar	13%
		Flexible Stand-Up Pouch	13%
Europe		Flexible	24%
		Bottle	18%
		Tube	13%

Top Claims Used

Global		No Additives/Preservatives	29%
		Time/Speed	15%
		Ethical - Environmentally Friendly Package	14%
Asia Pacific		No Additives/Preservatives	35%
		Microwaveable	20%
		Time/Speed	19%
Europe		Botanical/Herbal	34%
		No Additives/Preservatives	26%
		Ethical - Environmentally Friendly Package	21%

»»» Innovative Capsicum Launches: L3M (July - September 2015)

The Lucky Taco Jalapeño Hot Sauce (New Zealand)

The Lucky Taco Jalapeño Hot Sauce is now available. The sauce offers the taste of Mexico, is said to be very spicy, and retails in a 125ml pack.



Claims:
N/A

Original Source for Men Invigorate Black Pepper and Chilli Shower Hair & Body (India)

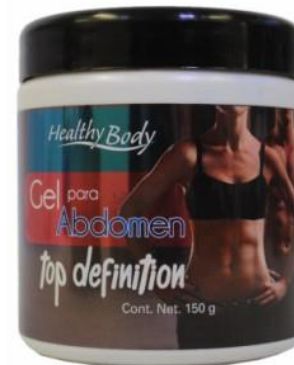
Original Source for Men Invigorate Black Pepper and Chilli Shower Hair & Body is packed with a natural fragrance and natural 'stuff', including chillis. The vegan and vegetarian product is people tested, and retails in a 250 recyclable pack bearing the brand's Facebook URL.



Claims:
Aromatherapy, Botanical/Herbal, Vegan, Ethical - Environmentally Friendly Package, Social Media, No Animal Ingredients, Male

Healthy Body Top Definition Abs Gel (Mexico)

Healthy Body Gel para Abdomen Top Definition (Top Definition Abs Gel) is said not to stain the clothes, while being fresh and moisturising and absorbing quickly. This product retails in a 150g pack.



Claims:
Moisturising / Hydrating, Time/Speed

Lunchables Uploaded Nacho Walking Taco Heat and Eat Snack (USA)

Lunchables Uploaded Nacho Walking Taco Heat and Eat Snack comprises corn tortilla chips, fully cooked and seasoned ground beef in taco sauce, salsa and nacho cheese sauce. The easy to enjoy product can be heated in a microwave in 15 seconds, and retails in a 4.5-oz. recyclable pack.



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

»»» Innovative Capsicum Launches: L3M (July - September 2015)

Fine Food Chicken Spring Rolls (Pakistan)

Fine Food Chicken Spring Rolls are now available. The halal product retails in a 960g pack containing 21-25 pieces.



Claims:
Halal

McCain Capsicums (New Zealand)

McCain Capsicums are said to be the recipe ready and diced for just adding to pizza, pasta sauces, and stews. The microwavable product is picked for perfection and is prepared for convenience. It contains no artificial colours, flavours, or preservatives; and retails in a 500g pack featuring a Facebook link.



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

Sealord Salsa Verde Tuna Pocket (New Zealand)

Sealord Salsa Verde Tuna Pocket is described as a fusion of real ingredients, with the distinctive Italian taste of tuna, capers, mustard and parsley. It is all gently and slowly cooked to lock in flavour, and contains a good source of omega 3. This product retails in a 110g pack featuring the Dolphin Friendly logo.



Claims:
Ethical - Environmentally Friendly Product, Ethical - Animal

Czas na Grill Pork Skewer with Capsicum and Onion (Poland)

Czas na Grill Szaszлык Wieprzowy z Warzywami Papryka i Cebula (Pork Skewer with Capsicum and Onion) is now available. The product contains raw meat with added water and retails in 480g pack.



Claims:
Seasonal

»»» Innovative Capsicum Launches:

L3M (July - September 2015)

Nice 'N Fresh Frozen Green Capsicum (India)

Nice 'N Fresh Frozen Green Capsicum features a 100% premium quality. The hand-picked green capsicum is processed using individual quick freezing technology, which leads to the freezing of each piece individually, meaning cells do not rupture or get damaged, preserving the natural nutrition and flavour. The natural product is suitable for vegetarians, and is free from artificial colours, preservatives and additives. It retails in a 500g pack.



Claims:
No Additives/Preservatives, Vegetarian, Premium

Pitango Malaysian Vegetable Laksa (New Zealand)

Pitango Malaysian Vegetable Laksa is an aromatic spiced noodle soup made with vegetables, coconut, lemongrass and chilli. The manufacturer claims to use only natural ingredients, make meat stocks from scratch, fresh, every day. They also carefully select the finest quality ingredients and use simple techniques to bring out the best flavour.



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

Elements Wellness No Vedana Gel (India)

Elements Wellness No Vedana Gel contains six natural oils and extracts, including Gandhpura and Kayaputi ka tel. It gives relief from small and large joint pain, eases muscular pain and reduces frozen shoulder pain. According to the manufacturer, the product brings a unique experience based on a tested combination of 100% Ayurvedic ingredients that not only works on muscular pain but also works on small and large joints.



Claims:
All Natural Product, Other (Functional), Time/Speed

Naked Kitchen New Orleans Jambalaya (New Zealand)

Naked Kitchen New Orleans Jambalaya is made with green beans and buckwheat. This vegetarian hot meal comprises spicy rice, and super-grains including buckwheat and chia. It contains antioxidants, proteins and minerals, and no gluten, artificial colours, flavours or preservatives. The microwavable product is made with premium natural ingredients and retails in a 500g pack. The manufacturer supports Oxfam and their contribution supports sustainable farming.



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



Australian Innovative Capsicum Launches: L3M (July - September 2015)

Woolworths Created with Jamie Spiced Chicken Tagine Meal Kit



Beerenberg Tomato and Cracked Pepper Relish



Street Food Meal Pots Chicken Noodle Pad Thai



Woolworths Select Chicken Thai Red Curry Meal for One



Woolworths Cooking with Kylie Kwong Sweet and Sour Sauce



Wattle Valley Chunky Dips Sweet Chilli Dip with Cashew & Parmesan



Woolworths Cooking with Kylie Kwong Mongolian Style Beef



El Tora Hard & Soft Taco Kit





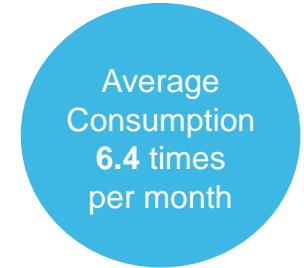
Brussels
Sprouts.



Both purchase and consumption frequency have slightly increased since Wave 12. On average, consumers purchase Brussels Sprouts 3 times per month, and consume them around 6 times per month.



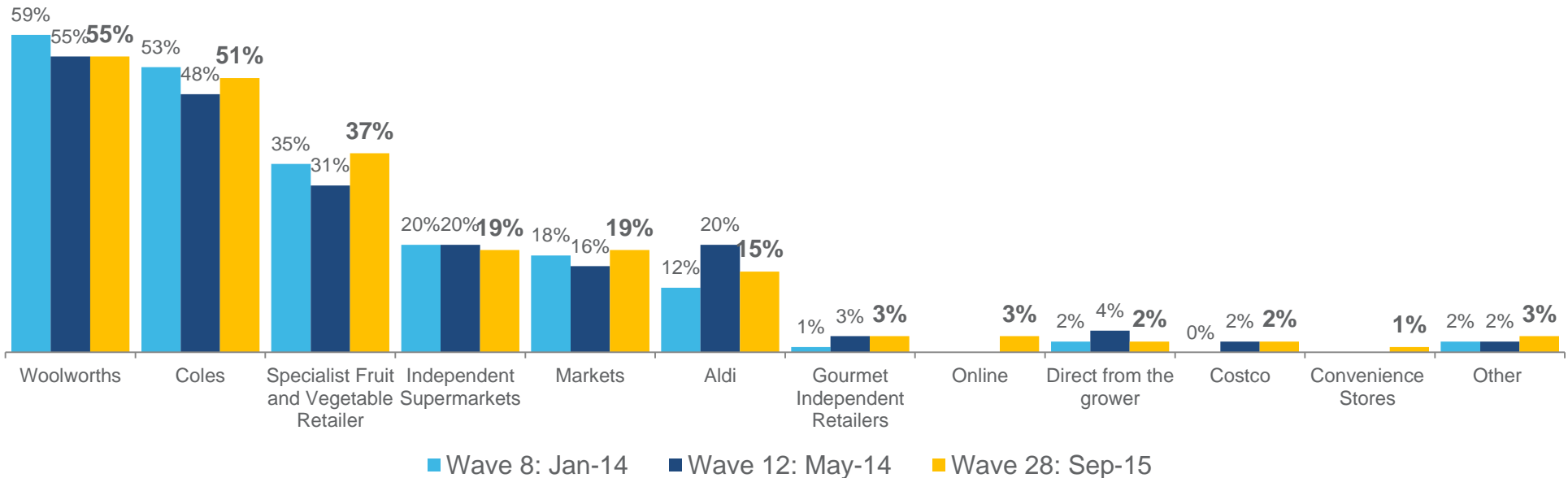
▼ 3.1 times, Wave 8
▼ 2.9 times, Wave 12



▼ 6.2 times, Wave 8
▼ 5.5 times, Wave 12

Woolworths and Coles remained the key locations for purchase.

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 8 N=293, Wave 12 N=310, Wave 28 N=268



Average Spend and Price Sensitivity



Average weight of purchase

The average consumer typically purchased **0.7kg** of Brussels Sprouts in September 2015, relatively consistent with previous waves.

- 0.7kg, Wave 8
- 0.6kg, Wave 12



Recalled last spend

The average recalled last spend was **\$4.00**. This is in a similar price range with the recalled spend measured in earlier waves.

- ▼ \$4.30, Wave 8
- ▲ \$3.70, Wave 12



Value for money

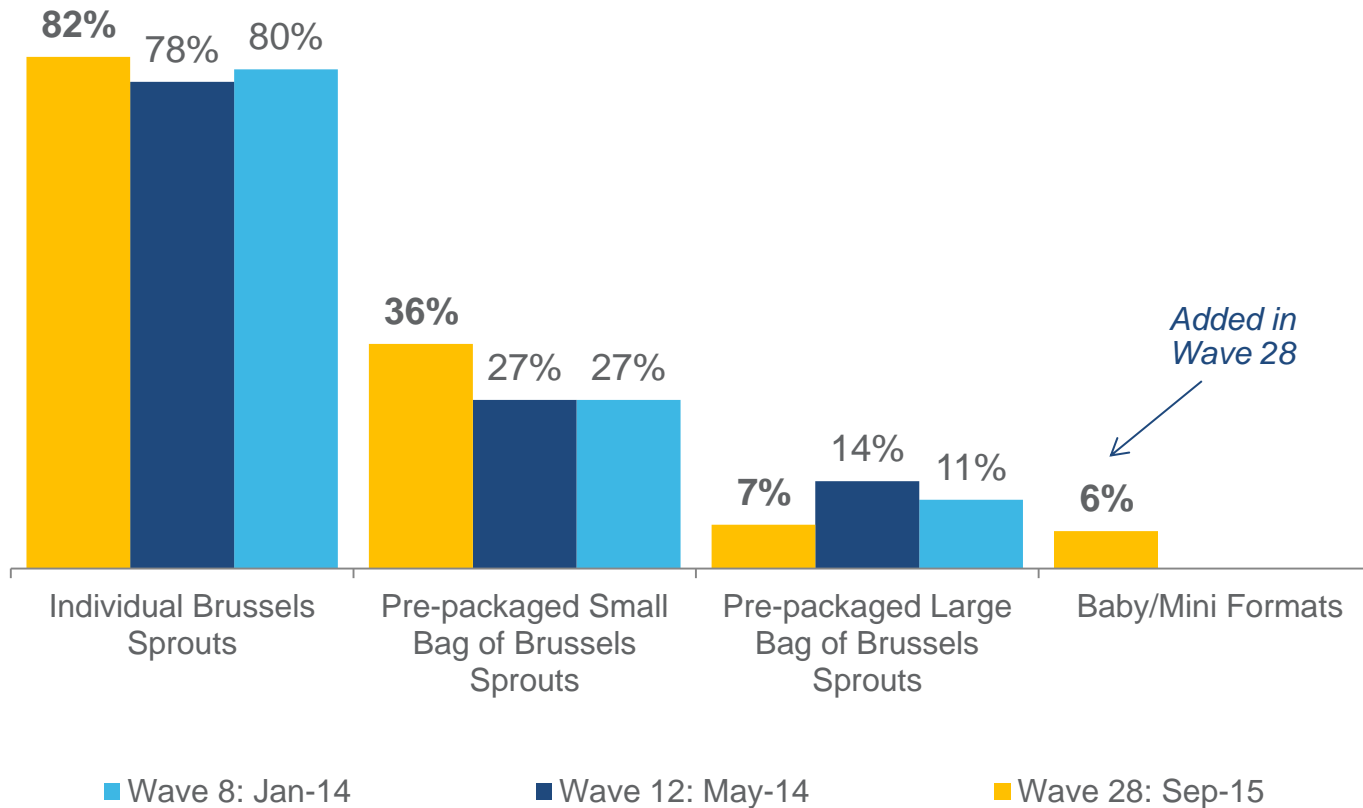
On average, consumers perceived Brussels Sprouts to be good value for money (**6.4/10**), higher than in previous waves.

- ▲ 5.9/10, Wave 8
- ▼ 6.1/10, Wave 12

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 8 N=293, Wave 12 N=310, Wave 28 N=268



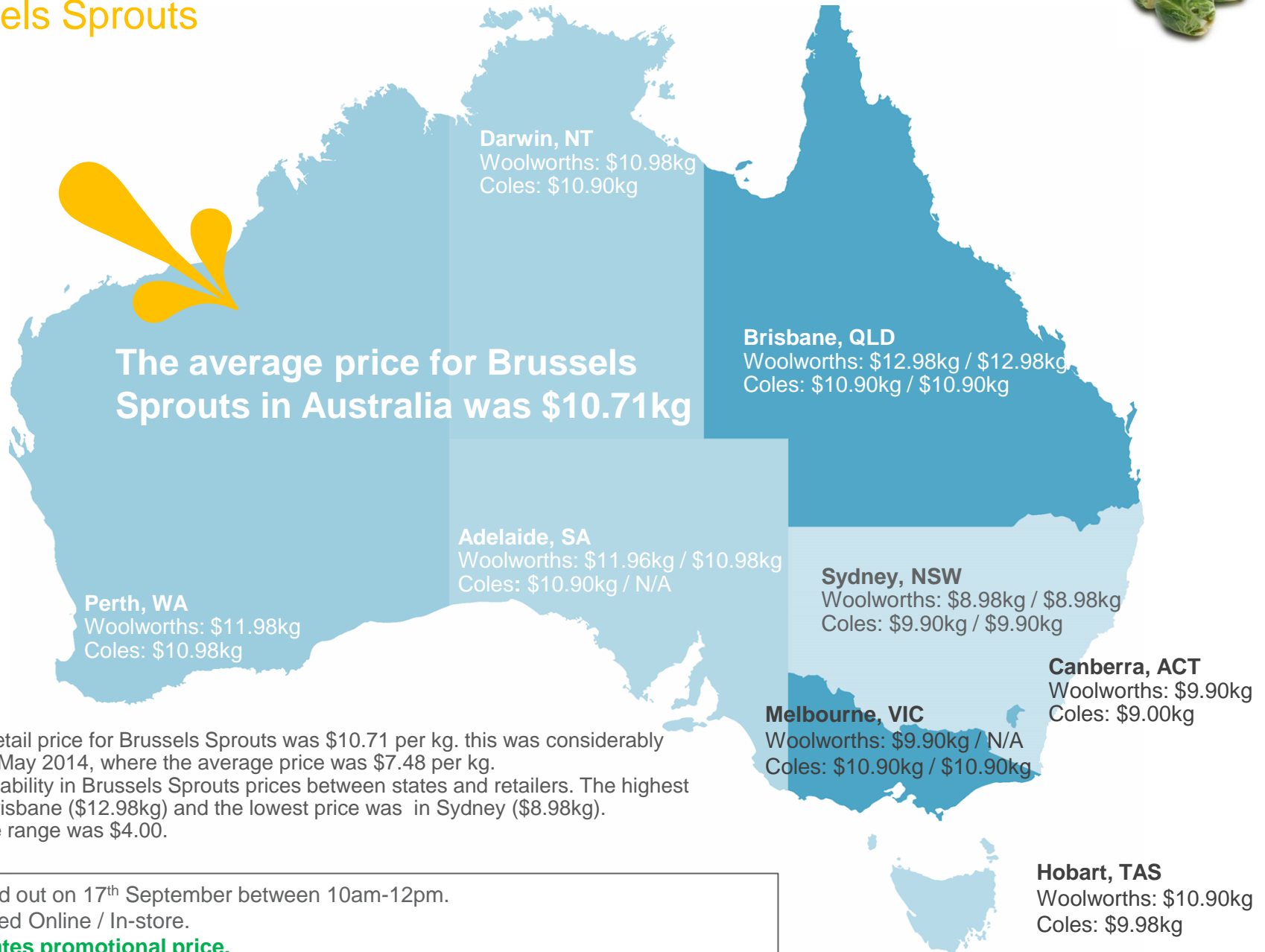
Individual Brussels Sprouts were the main format purchased, consistent with previous waves. The current wave saw an increase in the popularity of pre-packaged Brussels Sprouts in small formats.



Q4b. In what fresh formats do you typically purchase Brussels Sprouts?
Sample Wave 8 N=293, Wave 12 N=310, Wave 28 N=268

Online and In-store Commodity Prices

Brussels Sprouts



- The average retail price for Brussels Sprouts was \$10.71 per kg. this was considerably higher than In May 2014, where the average price was \$7.48 per kg.
- There was variability in Brussels Sprouts prices between states and retailers. The highest price was in Brisbane (\$12.98kg) and the lowest price was in Sydney (\$8.98kg).
- The retail price range was \$4.00.

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



Spontaneous Awareness & Purchase

Three quarters of respondents could not recall any type of Brussels Sprouts.

Those that mentioned a type of Brussels sprouts recalled green.

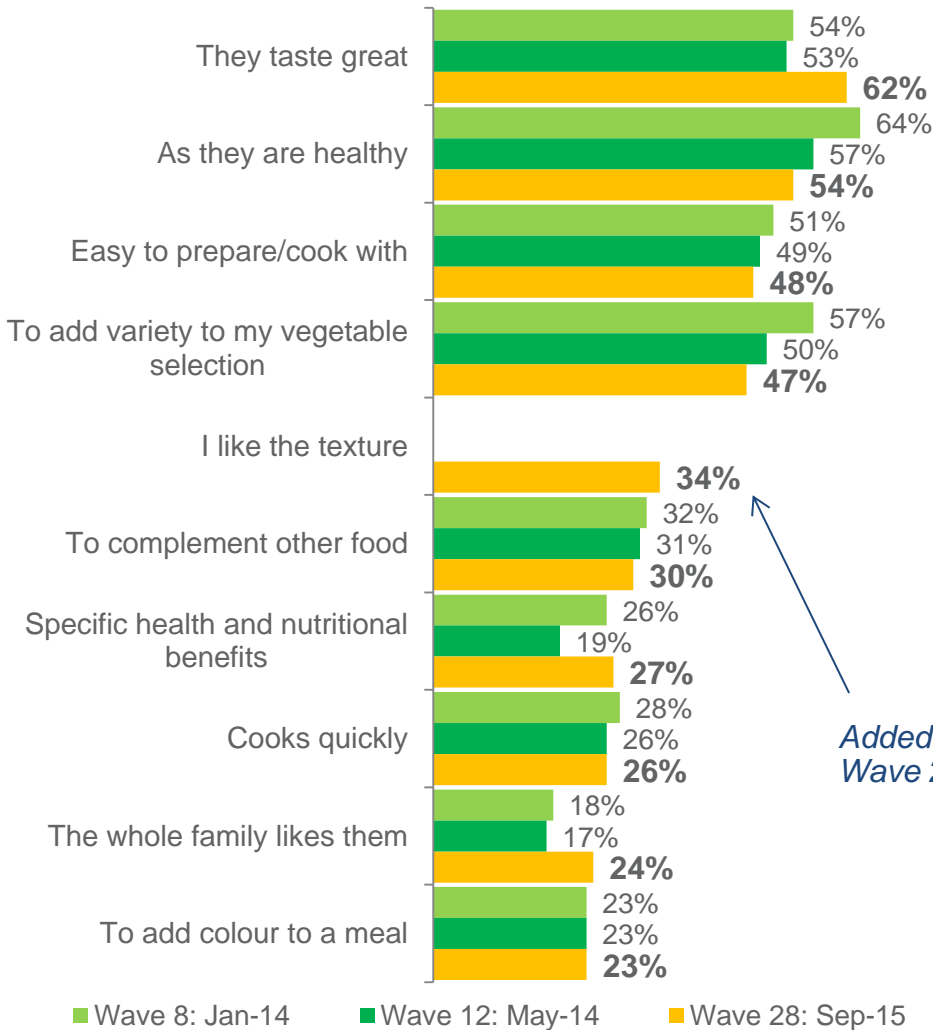




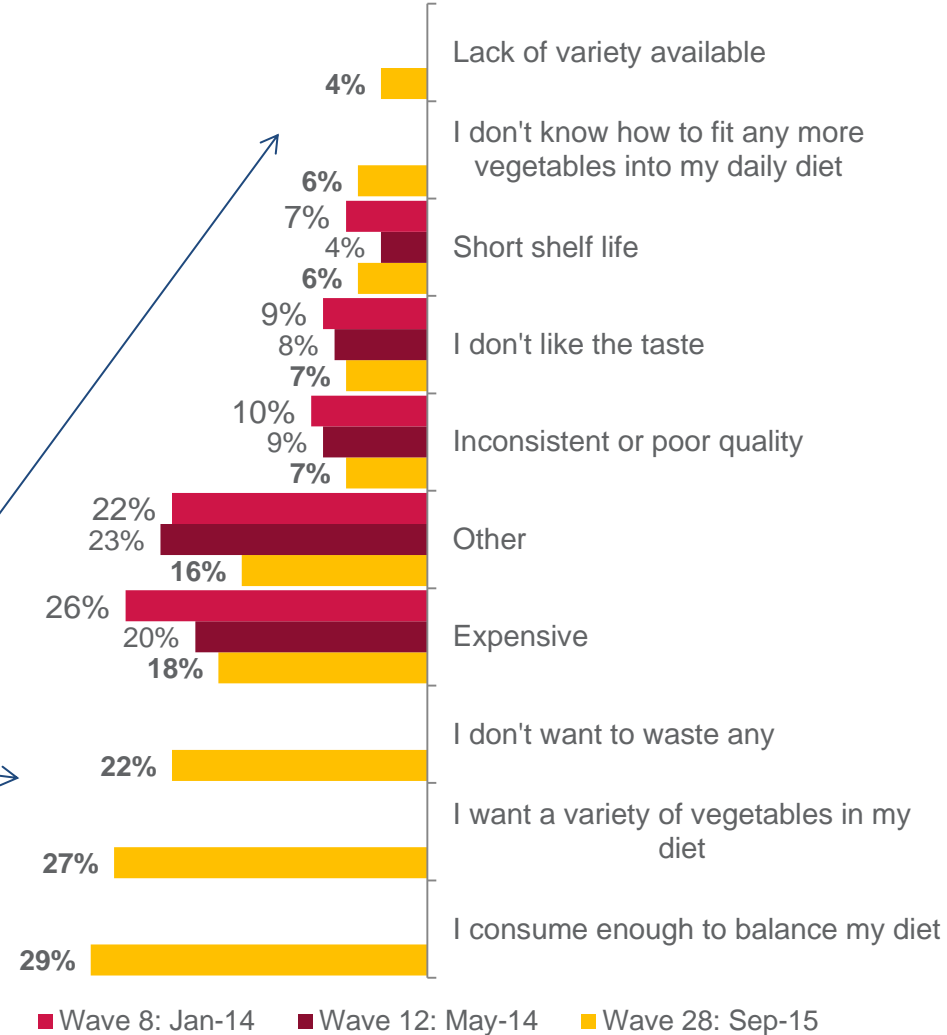
The main triggers for purchase are based around taste, health and ease of preparation. In contrast, the barriers to purchase for consumers are already consuming enough to balance their diet and also wanting a variety of vegetables.



Triggers



Barriers



Added in Wave 28

■ Wave 8: Jan-14 ■ Wave 12: May-14 ■ Wave 28: Sep-15

■ Wave 8: Jan-14 ■ Wave 12: May-14 ■ Wave 28: Sep-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 8 N=293, Wave 12 N=310, Wave 28 N=268



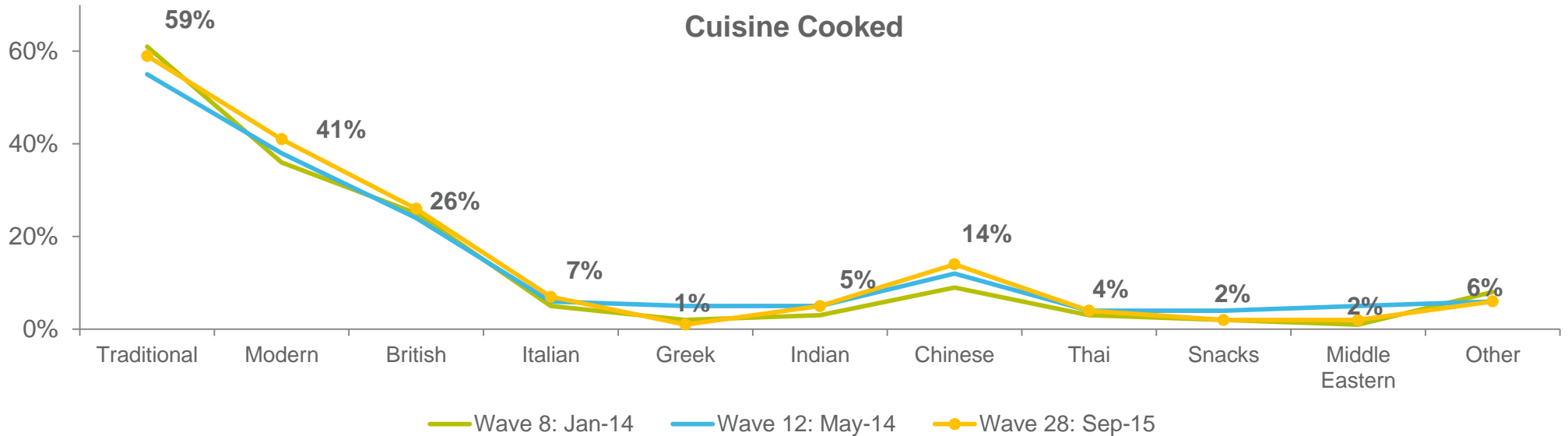
Dinner was consistently the main consumption occasion, for both weekdays and weekends.

Traditional Australian cuisine was the most common cooking style. Cuisine choice has remained consistent across previous waves.



Top 5 Consumption Occasions

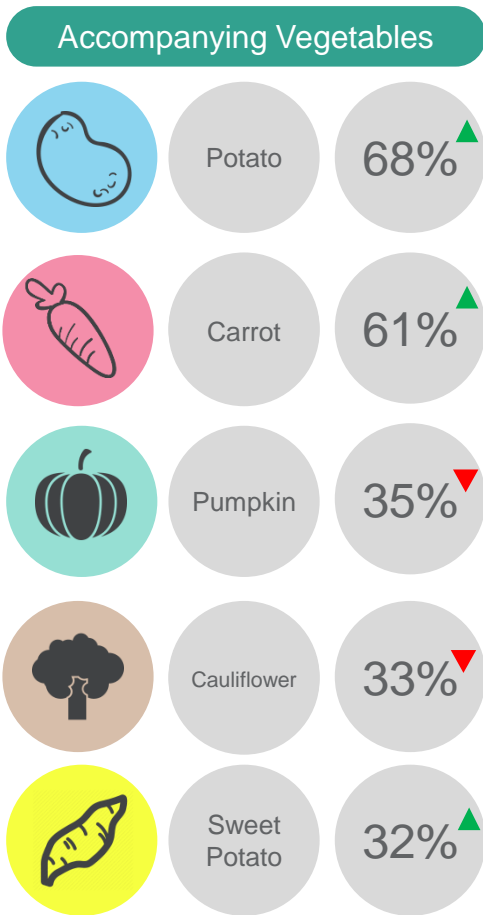
Wave 28	
Dinner	70%
Family Meals	57%
Weekday Meals	41%
Weekend Meals	31%
Quick Meals	23%



Q10. What cuisines do you cook/consume that use <commodity> ?
 Q11. Which of the following occasions do you typically consume/use <commodity> ?
 Sample Wave 8 N=293, Wave 12 N=310, Wave 28 N=268



Consumers prefer to cook Brussels Sprouts with potatoes, carrots and pumpkin. Brussels Sprouts are most commonly steamed and boiled.

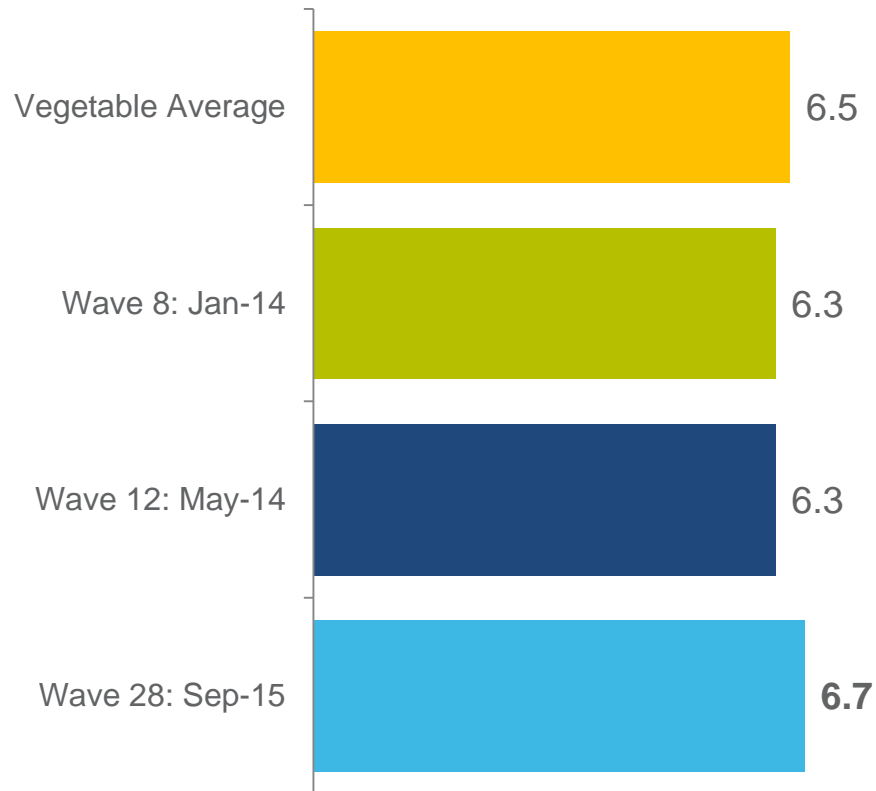


Top 10 Cooking Styles	
	Wave 28
Steaming	60%
Boiling	42%
Stir frying	23%
Microwave	18%
Roasting	16%
Sautéing	15%
Frying	12%
Slow Cooking	10%
Baking	9%
Soup	7%

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 8 N=293, Wave 12 N=310, Wave 28 N=268



Importance of provenance has increased since the last wave, now sitting above the Vegetable Average. Consumers find it is very important to know that Brussels Sprouts are grown in Australia.



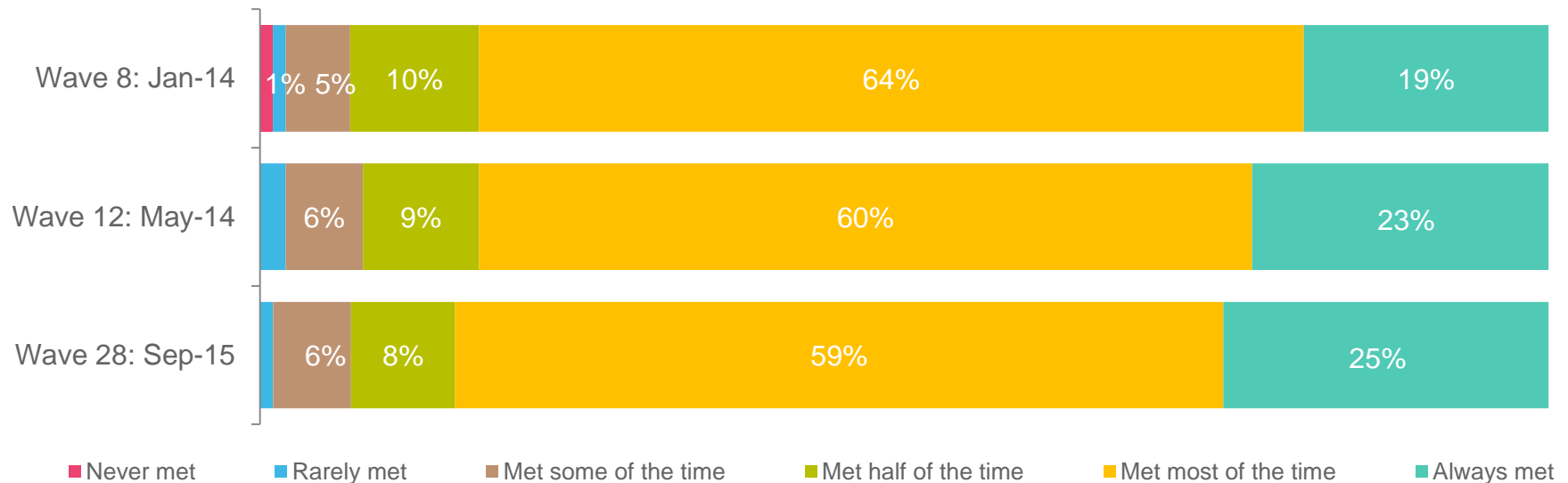


Consumers expect Brussels Sprouts to stay fresh for over eight days once purchased. This has trended upwards over the past three waves. Furthermore, this month saw an increase in consumers saying their expectations of freshness are always met.

Expected to stay fresh for **8.8 days**

- ▼ 8.2 days, Wave 8
- ▼ 8.6 days, Wave 12

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 8 N=293, Wave 12 N=310, Wave 28 N=268



Trends: Brussels Sprouts

*Due to low number of launches only Product slides will be shown.



Innovative Brussels Sprouts Launches: L3M (July - September 2015)

Aretol Brussels Sprouts (Russia)

Aretol Bryssel'skaya Kapusta (Brussels Sprouts) can be cooked in six to eight minutes. The product retails in a 400g pack.



Claims:
N/A

Nature's Greens Savory Selections Brussels Sprouts and Bok Choy with Bacon Sriracha Sauce (USA)

Nature's Greens Savory Selections Brussels Sprouts and Bok Choy with Bacon Sriracha Sauce is triple washed, contains 80% recommended daily value of vitamin C, and microwaves in the bag. The ready to eat product can be prepared in five minutes and retails in a 10-oz. pack bearing Facebook, Twitter, Pinterest and Instagram logos.



Claims:
Ease of Use, Social Media, Microwaveable

Ocean Mist Farms Microwavable Brussels Sprouts (Canada)

Ocean Mist Farms Microwavable Brussels Sprouts is now available. The ready to cook and serve product can be microwaved in the bag, grilled, sautéed or roasted or can be seasoned, sealed and steamed in the bag for five minutes. It is a no. 1 grade product and retails in a 454g zip lock pack.



Claims:
Ease of Use, Convenient Packaging, Microwaveable

Sautéés by Green Giant Bacon Brussels Sprouts Sauté (USA)

Sautéés by Green Giant Bacon Brussels Sprouts Sauté comprises brussels sprouts with seasoning and bacon garnish. The product features a mild level of heat, is USDA inspected and can be prepared in three easy steps. The mild product is naturally flavoured with other natural flavours, and can be prepared in three easy steps. It is claimed to be the number one carbohydrate choice, and retails in a 10-oz. pack.



Claims:
Ease of Use



Spinach.



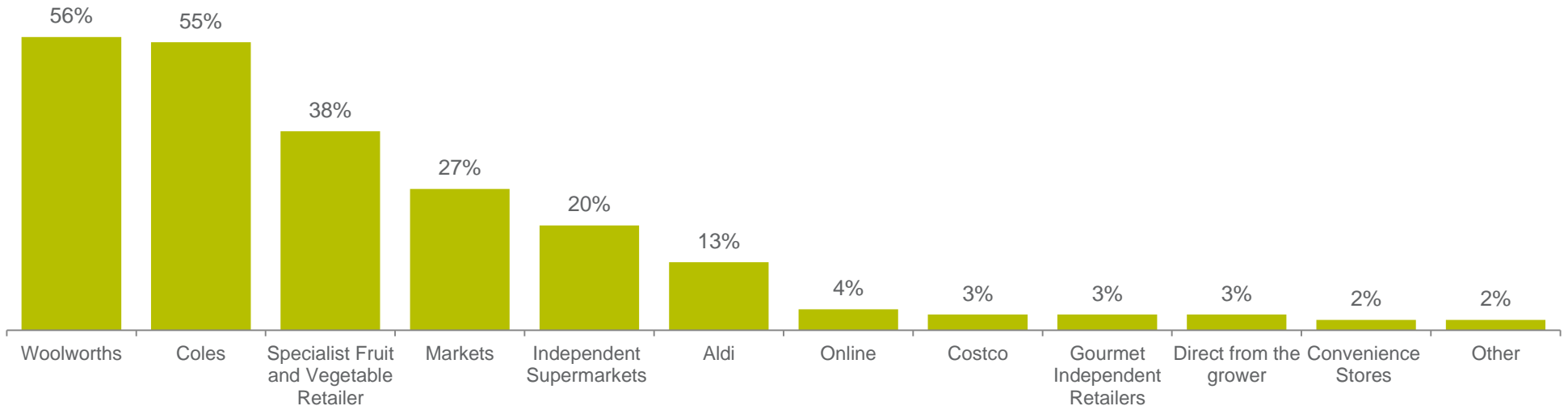
On average, spinach is purchased five times per month, and is consumed around ten times per month.

Spinach is predominantly purchased through mainstream retailers. Specialist retailers and markets are also popular channels.

Average Purchase 5.2 times per month

Average Consumption 10.6 times per month

Purchase Channels



■ Wave 28: Sep-15

Q1. On average, how often do you purchase Spinach (English and baby)?
Q2. On average, how often do you consume Spinach (English and baby)?
Q5. From which of the following channels do you typically purchase Spinach (English and baby)?
Sample Wave 28 N=308



Average Spend and Price Sensitivity



Average weight of purchase

The average consumer typically purchases **0.5kg** of Spinach.



Recalled last spend

Recalled last spend on Spinach is **\$3.80**.



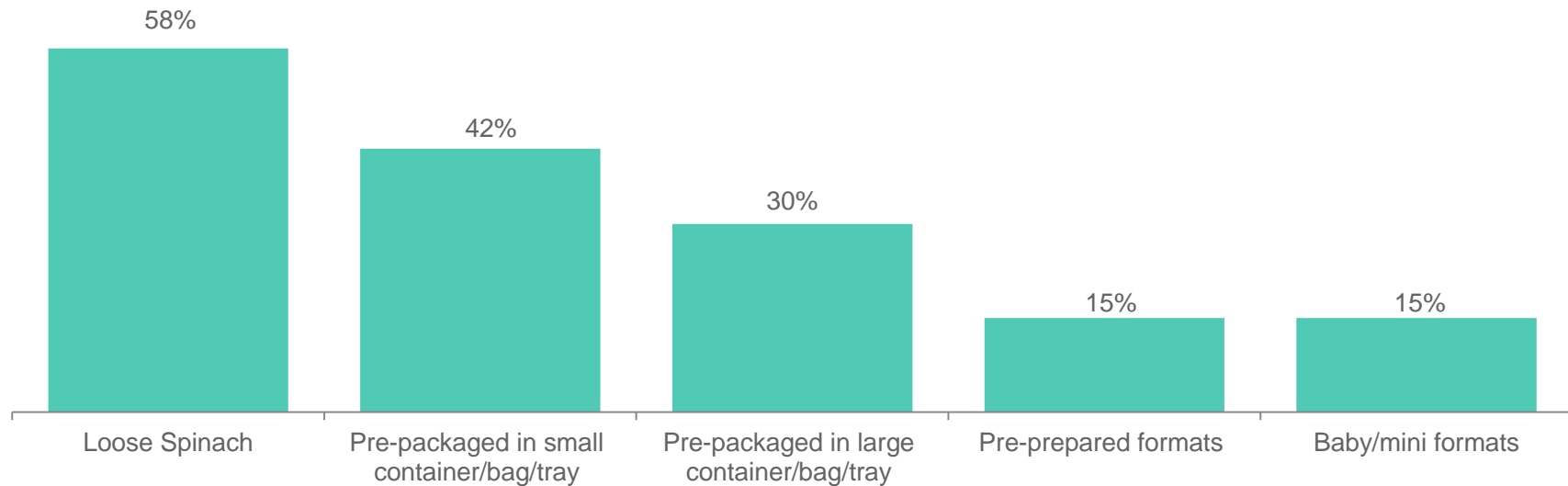
Value for money

Consumers perceive Spinach to be good value for money (**6.4/10**).

Q3. How much Spinach 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 28 N=308



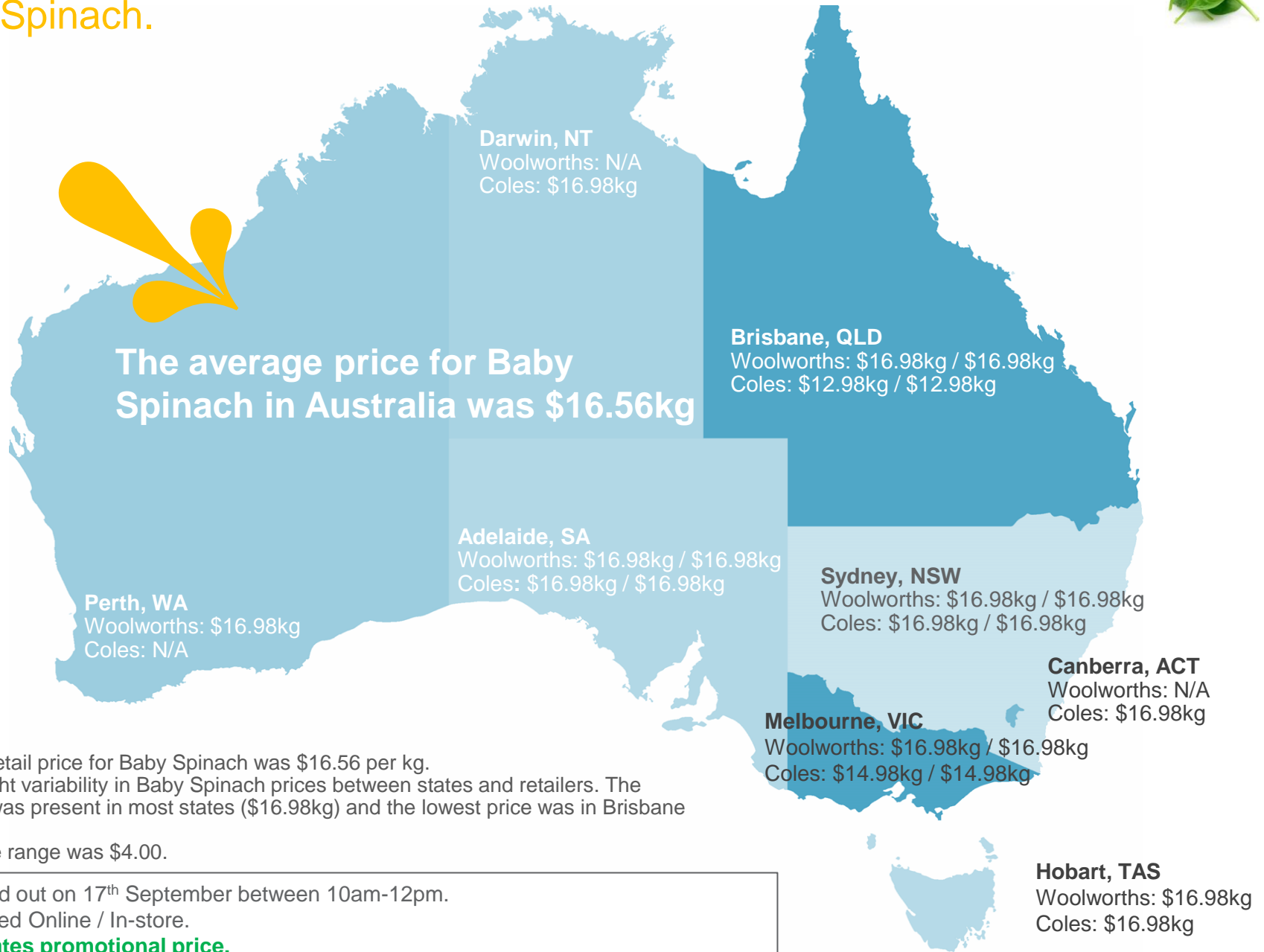
Loose Spinach is the most common purchase format. Other options which are purchased include various pre-packaged and pre-prepared formats.



Q4b. In what fresh formats do you typically purchase Spinach (English and baby)?
Sample Wave 28 N=308

Online and In-store Commodity Prices

Baby Spinach.

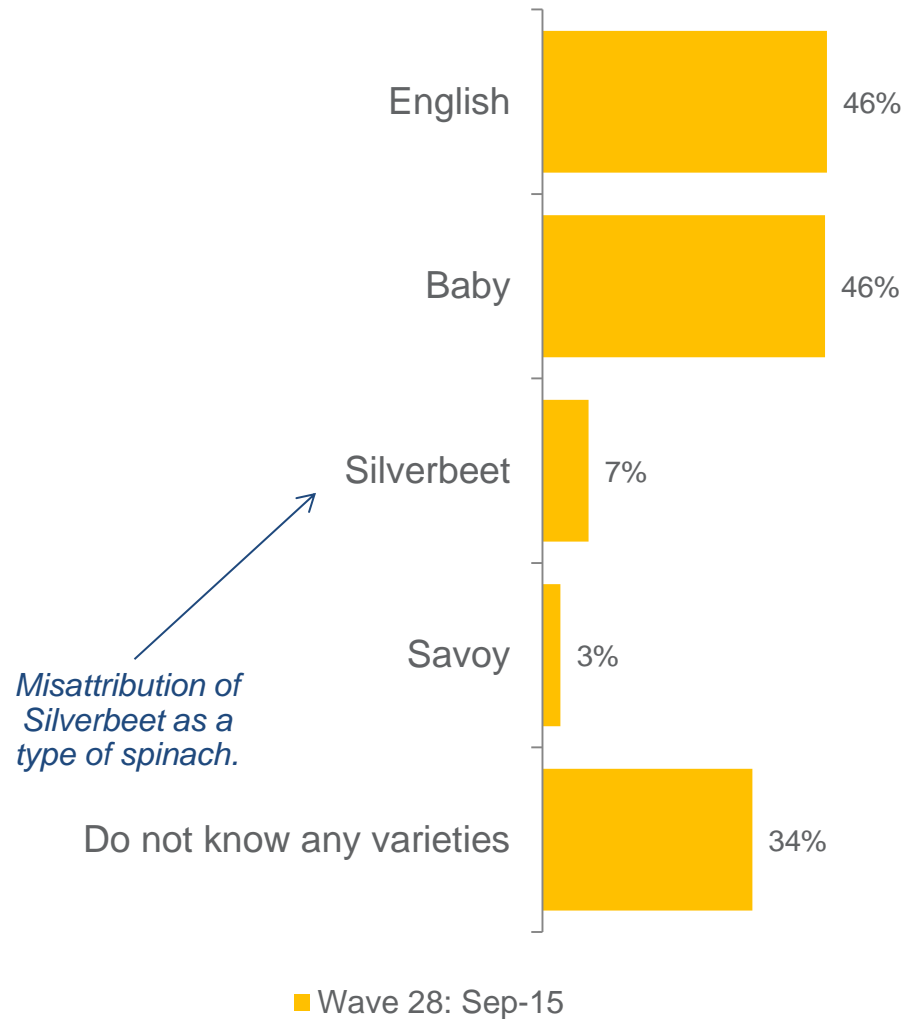


- The average retail price for Baby Spinach was \$16.56 per kg.
- There was slight variability in Baby Spinach prices between states and retailers. The highest price was present in most states (\$16.98kg) and the lowest price was in Brisbane (\$12.98kg).
- The retail price range was \$4.00.

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



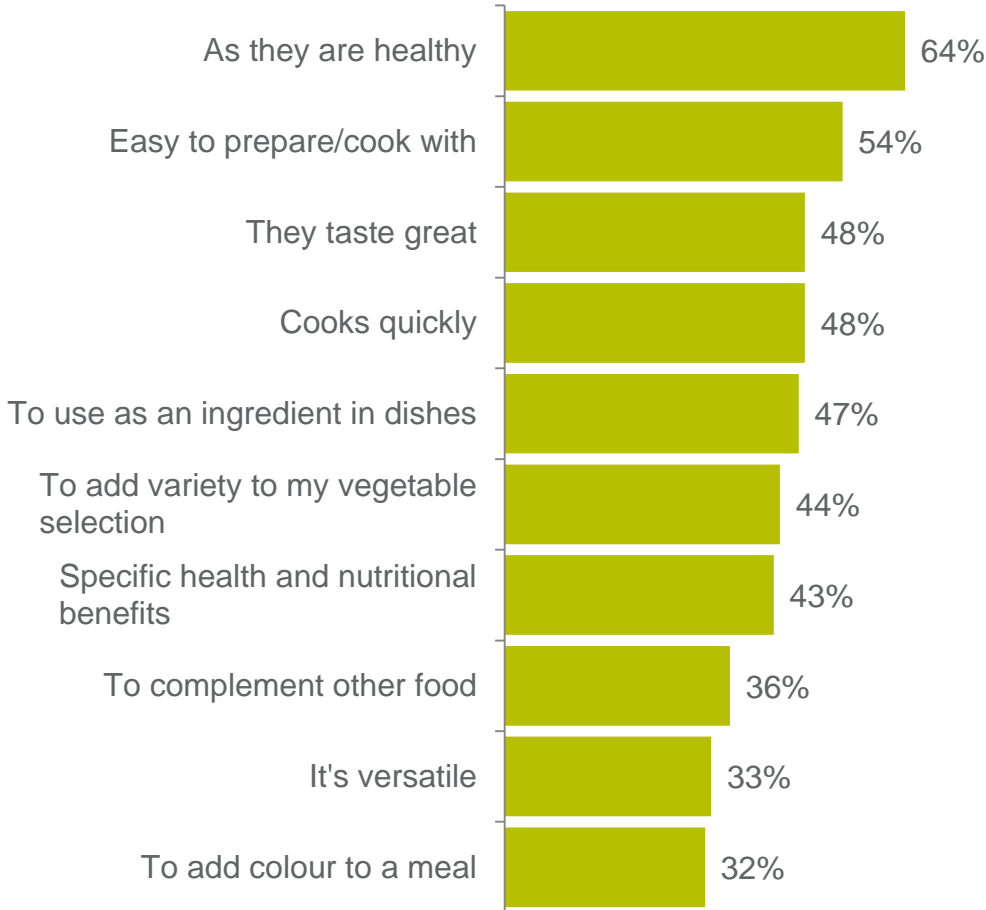
English and Baby are the most recalled types of Spinach. Whilst one third of respondents could not recall a type, 7% perceived that Silverbeet was a type of Spinach.



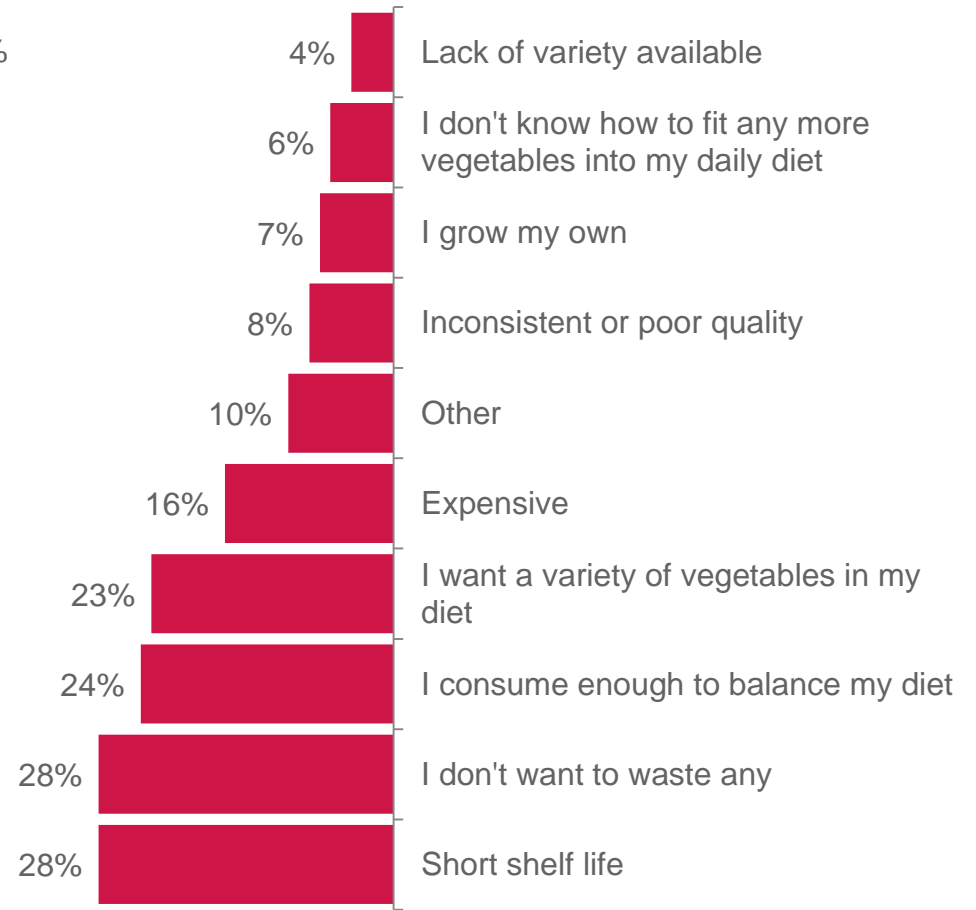


The key drivers of purchase for Spinach are related to health, ease of preparation and taste. taste. In contrast, short shelf life and desire not to waste any are the key barriers to purchase.

Triggers



Barriers



Q7. Which of the following reasons best describes why you purchase Spinach (English and baby)?
Q8. Which reason best describes why you don't buy Spinach (English and baby) more often?
Sample Wave 28 N=308



Australian, Chinese and Italian cuisines are popular for spinach dishes.

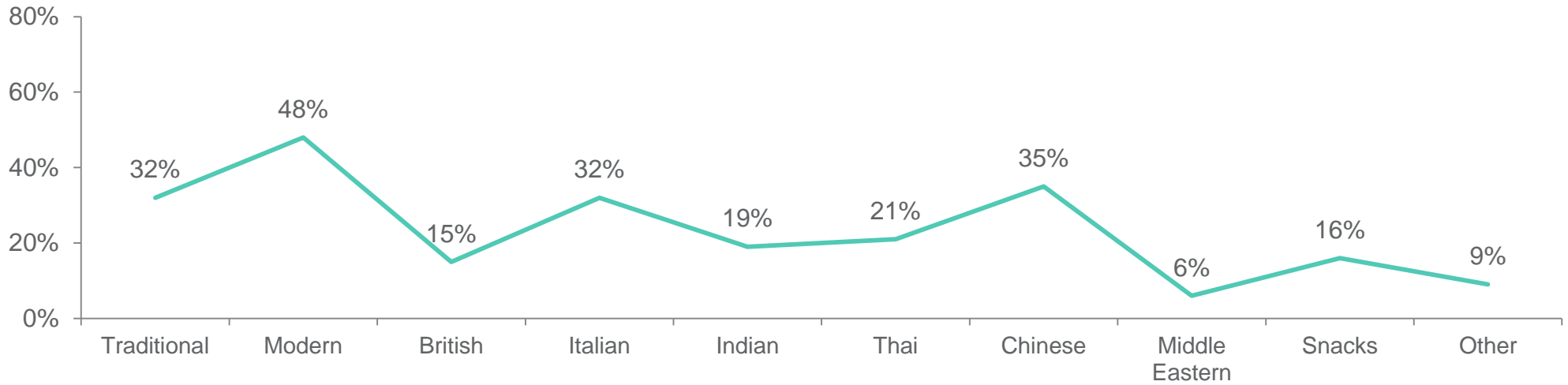
Meal occasions tend to occur during dinner and family meals.

Top 5 Consumption Occasions



Dinner	69%
Family Meals	55%
Quick Meals	52%
Lunch	47%
Weekday Meals	43%

Typical Cuisine Cooked



— Wave 28: Sep-15

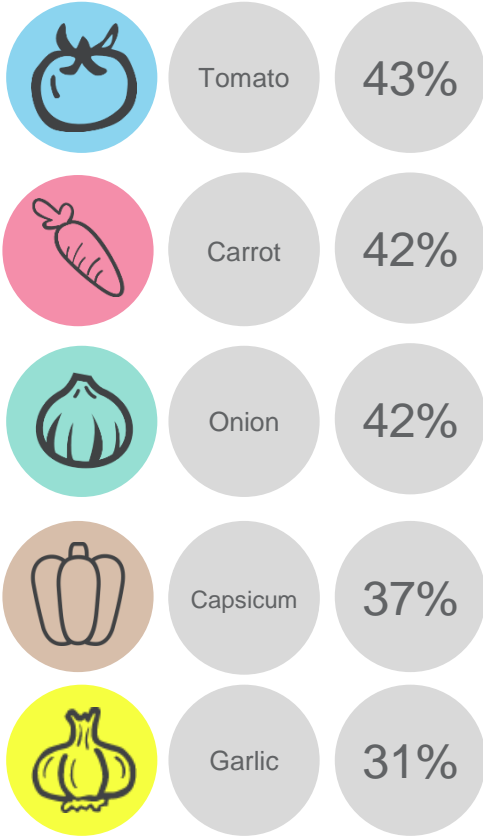
← Australian → ← European → ← Asian → ← Other Cuisines →

Q10. What cuisines do you cook/consume that use Spinach (English and baby)?
 Q11. Which of the following occasions do you typically consume/use Spinach (English and baby)?
 Sample Wave 28 N=308



Consumers prefer to use spinach mainly with tomatoes, carrots and onions. Spinach is generally stir fried or eaten raw.

Accompanying Vegetables

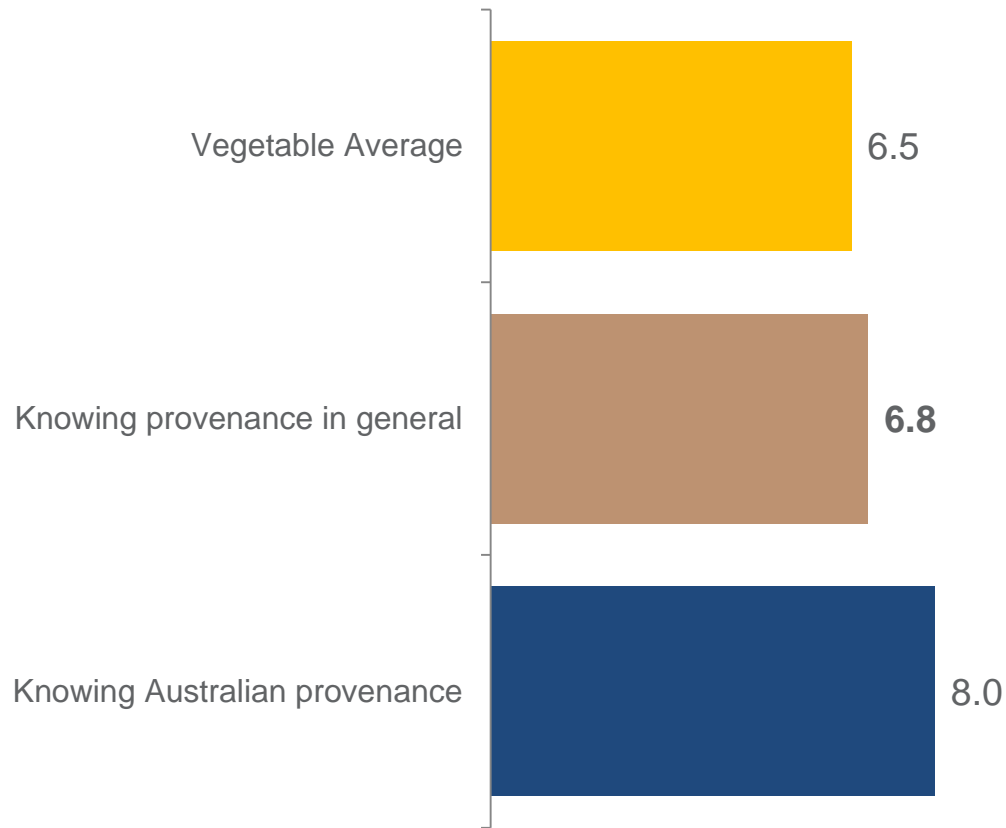


Top 10 Cooking Styles	
	Wave 28
Stir frying	54%
Raw	47%
Steaming	32%
Sautéing	30%
Soup	18%
Frying	14%
Boiling	13%
Baking	12%
Slow Cooking	8%
Microwave	7%

Q9. How do you typically cook Spinach (English and baby)?
Q10a. And when are you serving Spinach (English and baby) which of the following do you also serve together with this?
Sample Wave 28 N=308



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



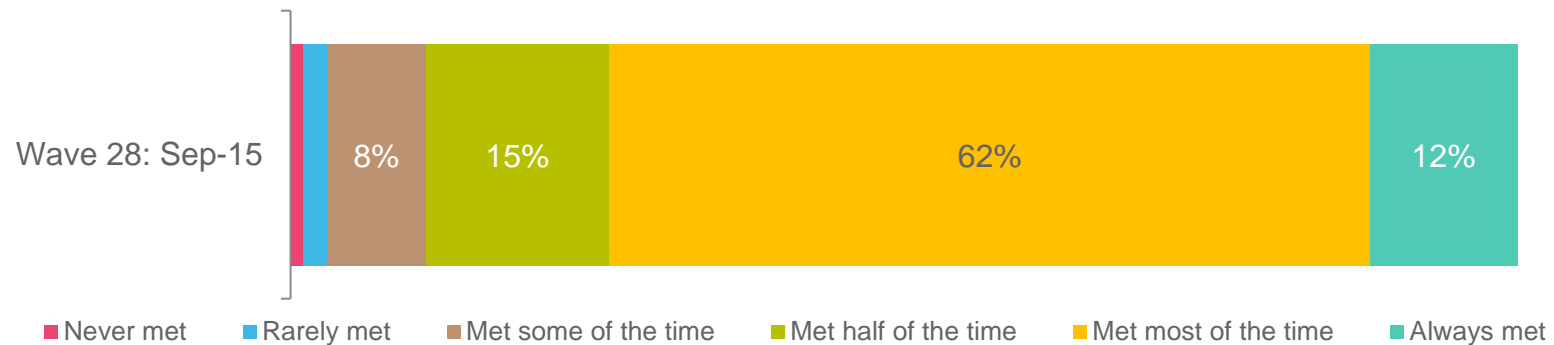
Q14. When purchasing Spinach (English and baby), how important is Provenance to you?
Q15. And when purchasing Spinach (English and baby), how important is that it is grown in Australia?
Sample Wave 28 N=308



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

Expected to stay fresh for 6.0 days

Expectations Met



Q12. How long do you expect Spinach (English and baby) to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy Spinach (English and baby)?
Sample Wave 28 N=308

A close-up photograph of vibrant green spinach leaves, showing their characteristic crinkled texture and bright color. The leaves are densely packed and fill the entire background of the slide.

Spinach Product Launch Trends.

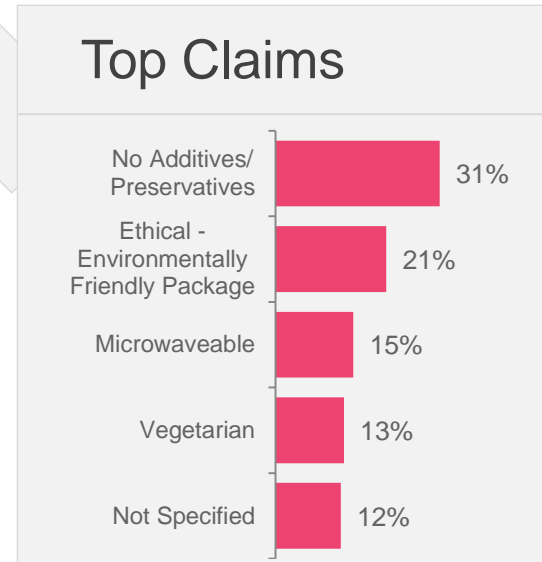
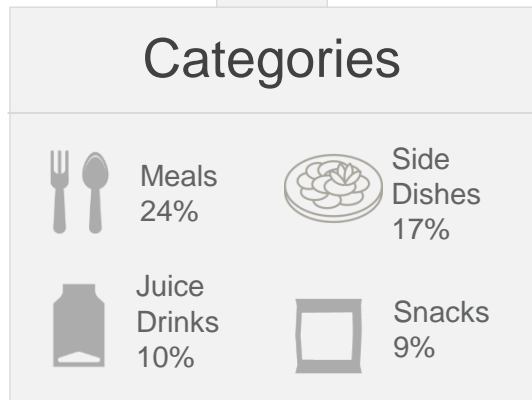
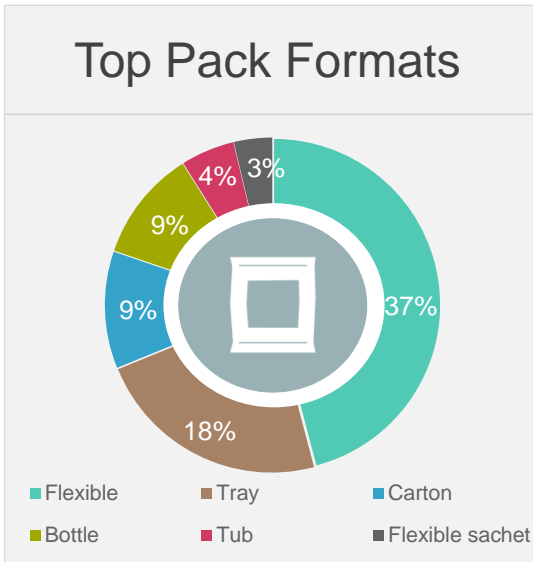
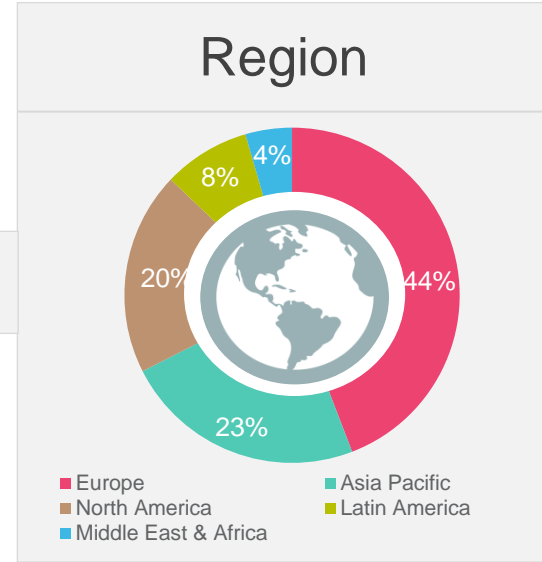
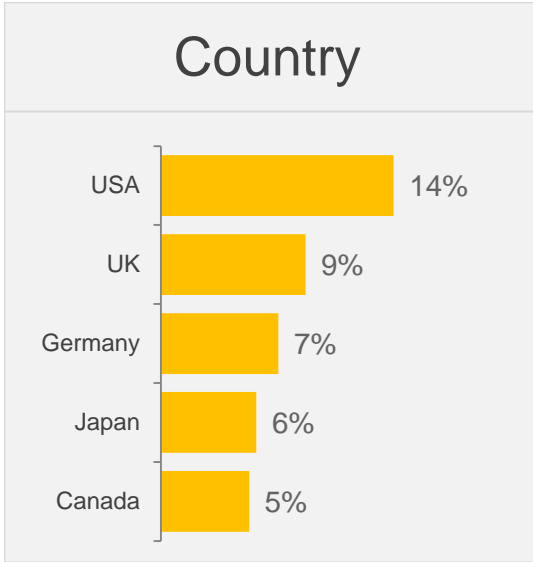
Spinach Global Launches

July - September 2015

There were 668 spinach products launched globally over the last three months. The majority of launches were in USA and the UK. Categories for launches were meals and side dishes. Key packaging for spinach products were flexible packaging and trays.



668 Global NPDs





Spinach Product Launches: Last 3 Months (July - September 2015) Summary

- There were 668 launches in the past 3 months globally that contained spinach as an ingredient.
- There were 25 products launched in Australia over the past three months.
- Europe (44%) and Asia Pacific (23%) were the key regions for launches.
- Flexible packaging (37%) and trays (18%) were the most common formats utilised.
- The main categories for launches were meals (24%), side dishes (17%), juice drinks (10%) and snacks (9%).
- Most popular claims on products included no additives/preservatives (31%) and ethical & environmentally friendly packaging (21%).
- The most innovative product launched were spinach flavoured thin crackers in China. Examples of these can be found in the following pages.



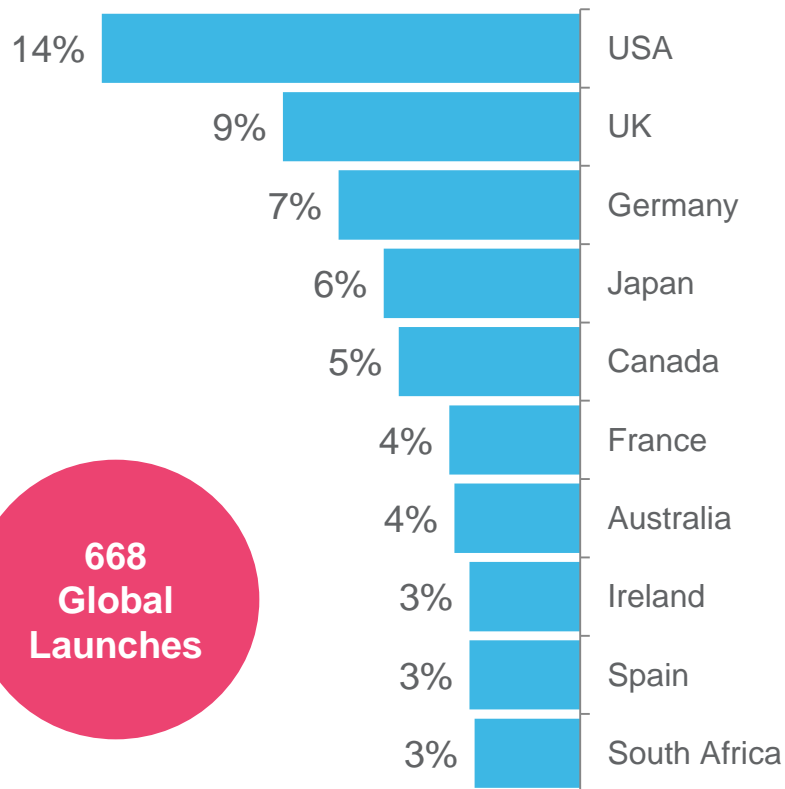
Source: Mintel (2015)



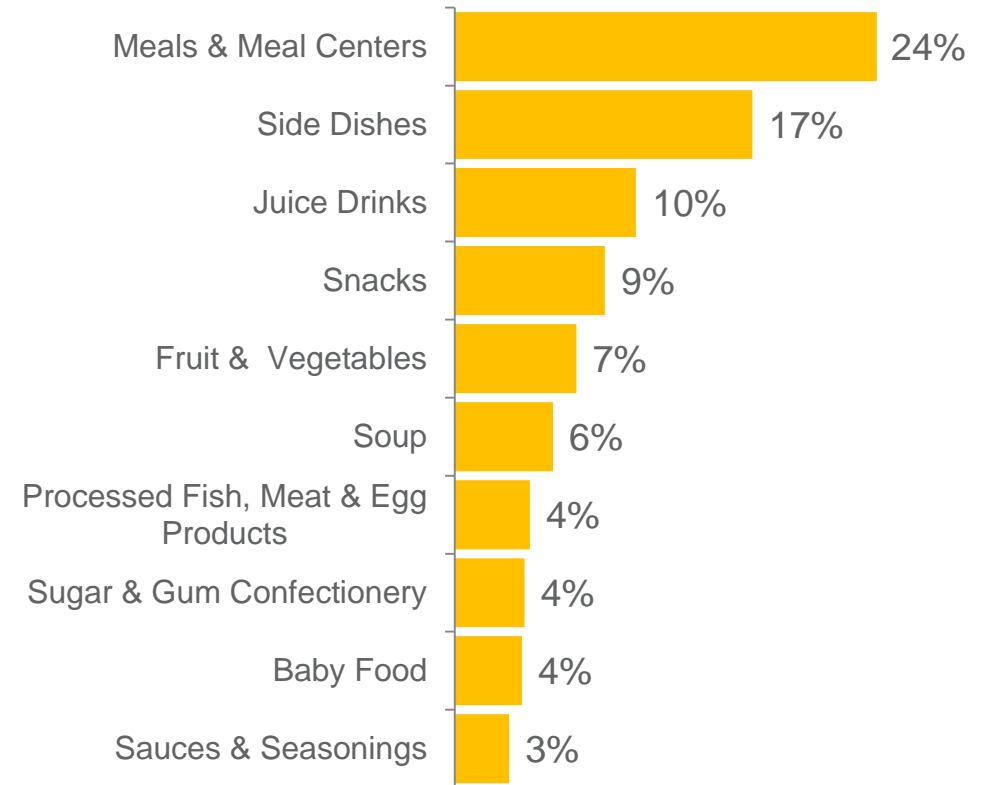
The majority of spinach launches occurred in USA and the UK.

The key categories for spinach launches are meals, side dishes, juice drinks and snacks.

Top Launch Countries



Top Launch Categories












668
Global
Launches












The main claim globally was no additives & preservatives, ethical & environmentally friendly packaging and microwaveable.

Flexible packaging and trays are primarily used for spinach products.

Pack Formats Used

Global		Flexible	37%
		Tray	18%
		Carton	9%
Europe		Flexible	35%
		Tray	29%
		Carton	11%
Asia Pacific		Flexible	42%
		Carton	11%
		Bottle	10%

Top Claims Used

Global		No Additives/Preservatives	31%
		Ethical - Environmentally Friendly Package	21%
		Microwaveable	15%
Europe		Ethical - Environmentally Friendly Package	21%
		No Additives/Preservatives	20%
		Microwaveable	20%
Asia Pacific		No Additives/Preservatives	54%
		Microwaveable	20%
		Ethical - Environmentally Friendly Package	20%

Only regions with n >30 are displayed



Innovative Spinach Launches: L3M (July - September 2015)

Williams-Sonoma Vegetable Trottolo (USA)

Williams-Sonoma Vegetable Trottolo is described as classic pasta spirals crafted in Italy from the finest durum wheat. The product retails in a 17.6-oz. pack.



Claims:
N/A

Atria Velvety Spinach & Nettle Soup (Finland)

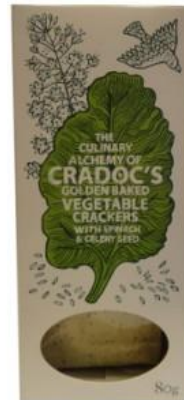
Atria Samettinen Pinaatti-Nokkos Keitto (Velvety Spinach & Nettle Soup) is made from Kasvis Gallerian vegetables and Juustoportti cheeses. The lactose-free product can be cooked in the microwave and retails in a 300g pack featuring the Blue Swan label.



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

Cradoc's Golden Baked Vegetable Crackers with Spinach & Celery Seed (UK)

Cradoc's Golden Baked Vegetable Crackers with Spinach & Celery Seed are recommended to be paired with hummus, charcuterie, patés, game terrine, vegetable spreads, yogurt dips, fresh soft cheeses and much more. The product contains no fat, is low in sodium, is suitable for vegans, and is free from additives, chemicals, E-numbers, preservatives, trans fats, palm oils, inhibitors and industrial stuff. It retails in an 80g pack featuring Facebook and Twitter logos.



Claims:
No Additives/Preservatives, No Animal Ingredients, Social Media, Vegan, Low/No/Reduced Transfat, Ethical - Environmentally Friendly Product, Low/No/Reduced Fat, Low/No/Reduced Sodium

Happy Taste Spinach Sticks (Indonesia)

Happy Taste Stik Bayam (Spinach Sticks) are crispy, delicious, healthy and premium quality snacks made from spinach, which contains antioxidants, iron, calcium, carbohydrates, vitamin A, vitamin C, niacin, phosphorus, potassium riboflavin, sodium, thiamine, and magnesium. This halal certified product retails in a 155g pack.



Claims:
Halal, Antioxidant, Premium



Innovative Spinach Launches: L3M (July - September 2015)

Natürlich Für Uns Organic Creamed Spinach (Austria)

Natürlich Für Uns Bio Cremespinat (Organic Creamed Spinach) is now available. This organic certified frozen product is made with Austrian spinach. It is microwaveable and retails in a 450g pack featuring the EU Green Leaf logo.



Claims:
Organic, Microwaveable

Pressbar Pineapple, Spinach, Apple & Lemon Juice (Germany)

Pressbar Ananas, Spinat, Apfel, Zitrone (Pineapple, Spinach, Apple & Lemon Juice) is now available. This unpasteurised and 100% raw cold pressed juice is free from added sugars and retails in a 250ml bottle.



Claims:
Low/No/Reduced Sugar

Woolworths Food Ready To Micro Creamed Spinach, Feta & Butternut (South Africa)

Woolworths Food Ready To Micro Creamed Spinach, Feta & Butternut comprises creamed spinach with feta and cinnamon butternut. The microwaveable product can be ready in 5-6 minutes and retails in a 450g recyclable pack.



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

Pack'd Detox Frozen Smoothie Kit (UK)

Pack'd Detox Frozen Smoothie Kit is a sophisticated mix of frozen fruit, vegetables and superfoods, designed with nutritionists for the ultimate smoothie. It contains no purees, preservatives, GMO, gluten, additives, preservatives, concentrates or artificial ingredients, and can be prepared by just adding liquid and blend.



Claims:
No Additives/Preservatives, All Natural Product, Low/No/Reduced Allergen, Convenient Packaging, GMO-Free, Social Media, Brain & Nervous System (Functional), Ease of Use, Other (Functional), Ethical - Environmentally Friendly Package, Immune System (Functional), Ethical - Charity, Gluten-Free, No Animal Ingredients, Vegan, Digestive (Functional)

»»»→ Innovative Spinach Launches: L3M (July - September 2015)

Argenpesca Breaded Hake Medallions with Spinach & Cheese (Argentina)

Argenpesca Medallones de Merluza con Espinaca y Queso Prefritos, Rebozados y Congelados (Breaded Hake Medallions with Spinach & Cheese) is frozen and pre-fried, and free from fish bones. The product retails in a 300g pack.



Claims:
N/A

Carrefour Spinach in Cream with Garlic (Spain)

Carrefour Espinacas Cortadas a la Crema y con Ajo (Spinach in Cream with Garlic) is now available. The product is can be prepared in a pan or in the microwave, and retails in a 1kg pack.



Claims:
Microwaveable

Tesco Leaf Spinach in Water (UK)

Tesco Leaf Spinach in Water has been repackaged and is now available in a 380g recyclable pack with a new look. The product is suitable for vegetarians and can be heated in a microwave. Each serving provides one of the five servings of fruits and vegetables a day.



Claims:
Vegetarian, Ethical - Environmentally Friendly Package, Microwaveable

Mei Ri Sheng Ji Spinach Flavoured Thin Cracker (China)

Mei Ri Sheng Ji Bo Cai Wei Bao Bing Gan (Spinach Flavoured Thin Cracker) contains iron. This product retails in a 280g pack containing 12 individual units.



Claims:
N/A



Australian Spinach Launches: L3M (July - September 2015)

Cocobella Chilled Green Machine Super Smoothie Coconut Water



Spiral Foods Spicy Wasabi Chips



Borg's Spinach & Ricotta Triangle Appetisers



Dr. Oetker Ristorante Pizza Mozzarella



Leggo's Authentico Fresh Agnolotti with Ricotta, Spinach & Parmesan



Super Blend Power Smoothies Super Booster Smoothie Mix





Parsnip.



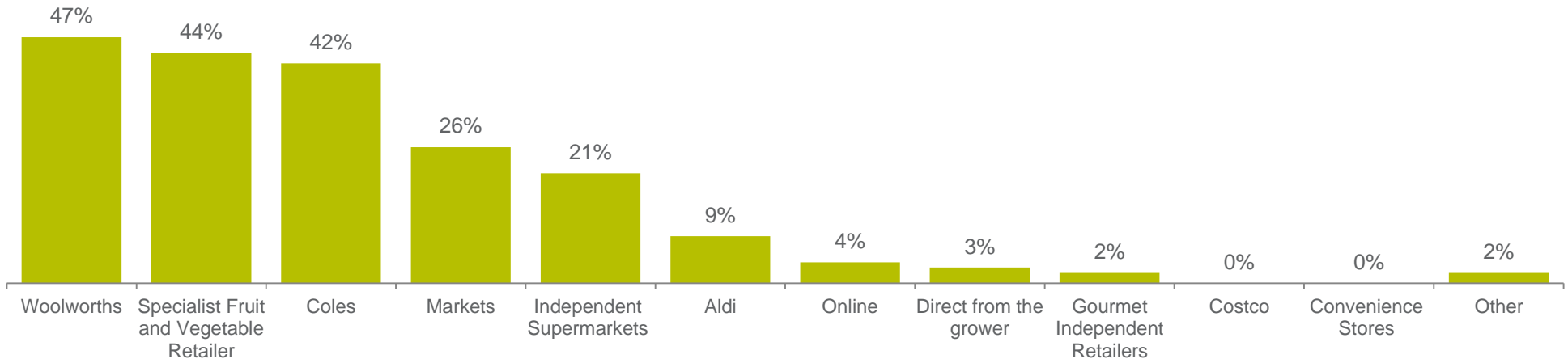
On average, parsnips are purchased twice per month, and are consumed around once per week.

Parsnips are generally purchased from Woolworths and specialist fruit and vegetable retailers.

Average Purchase 2.4 times per month

Average Consumption 4.5 times per month

Purchase Channels



■ Wave 28: Sep-15

Q1. On average, how often do you purchase Parsnips?
Q2. On average, how often do you consume Parsnips?
Q5. From which of the following channels do you typically purchase Parsnips?
Sample Wave 28 N=206



Parsnips are perceived as fair value for money, with consumers purchasing 700g on average.



Average weight of purchase

The average consumer typically purchases **700g** of parsnip.



Recalled last spend

Recalled last spend on parsnips was **\$3.70**.



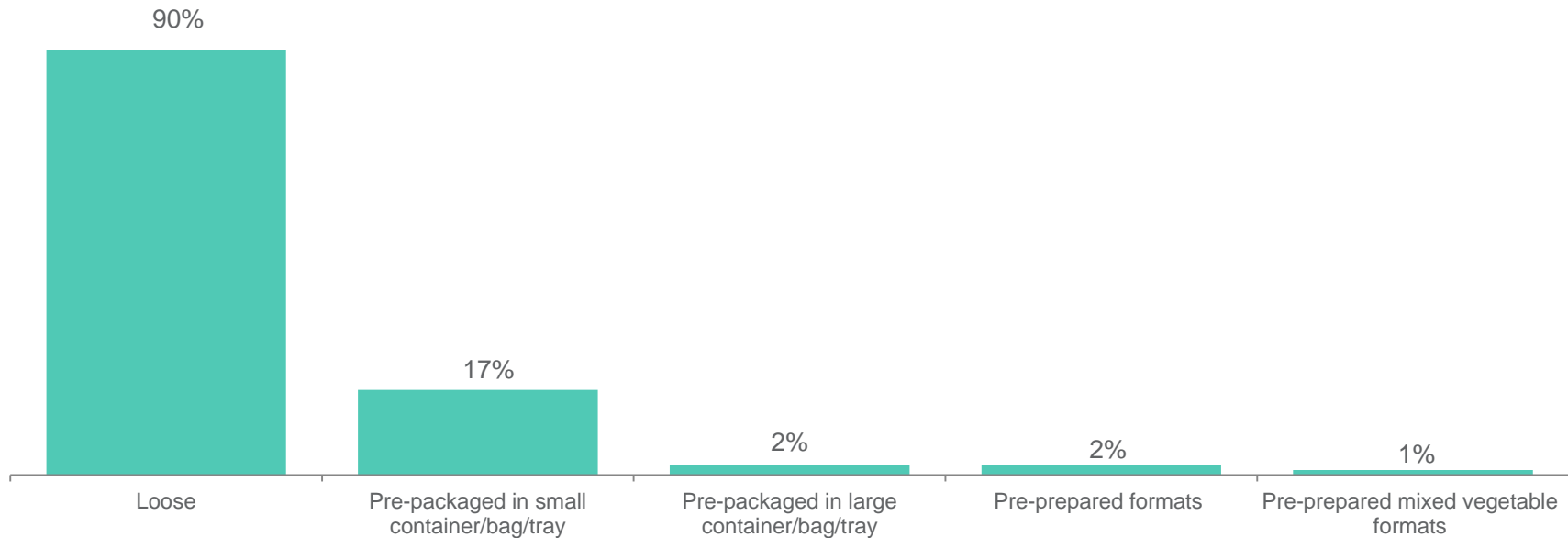
Value for money

Consumers' perceived value for money is fair for parsnips (**5.6/10**).

Q3. How much Parsnip 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 28 N=206

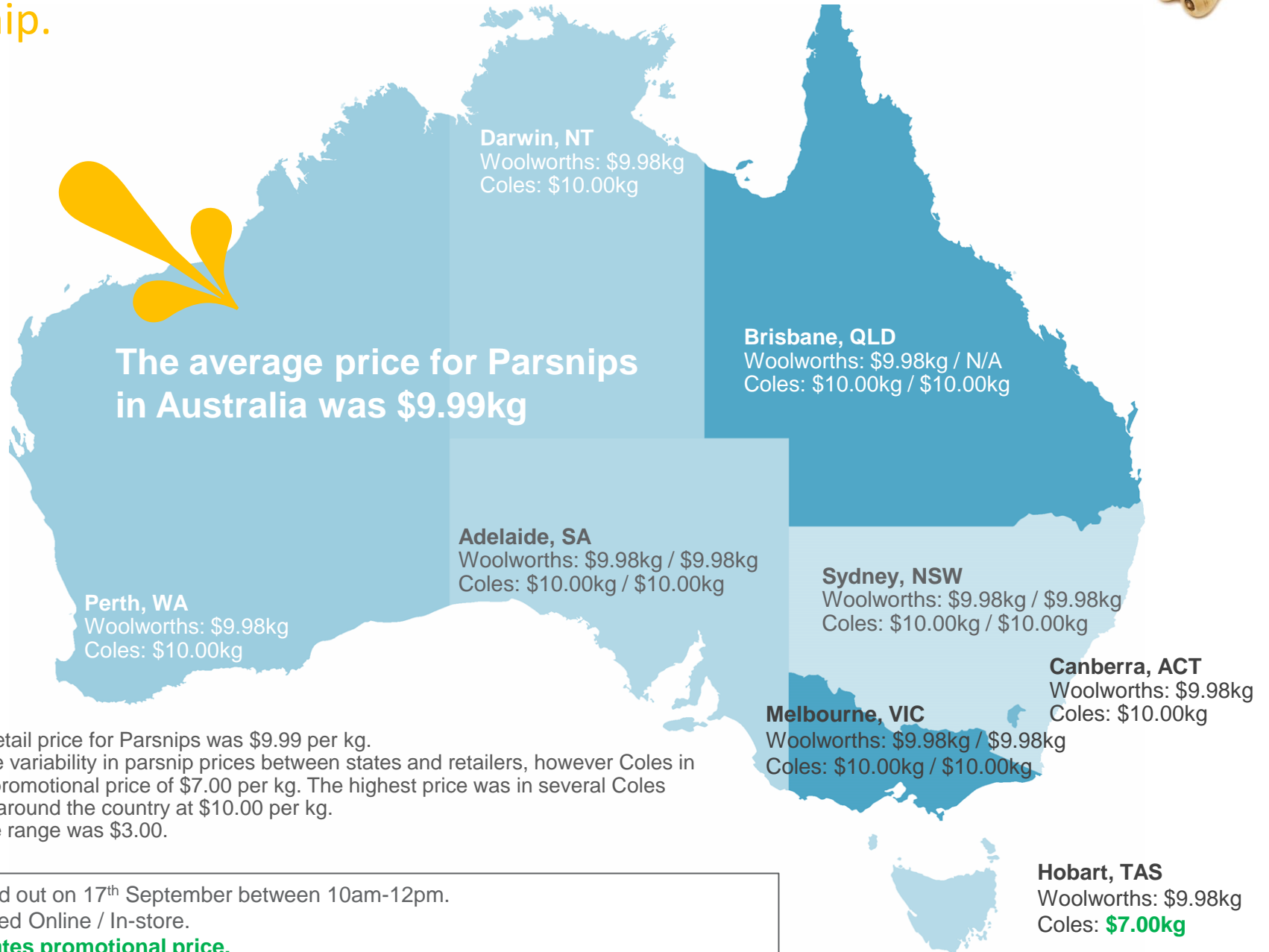


Individual parsnips are the most common purchase format. Small pre-packaged format is another relatively popular option.



Online and In-store Commodity Prices

Parsnip.



- The average retail price for Parsnips was \$9.99 per kg.
- There was little variability in parsnip prices between states and retailers, however Coles in Hobart had a promotional price of \$7.00 per kg. The highest price was in several Coles supermarkets around the country at \$10.00 per kg.
- The retail price range was \$3.00.

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



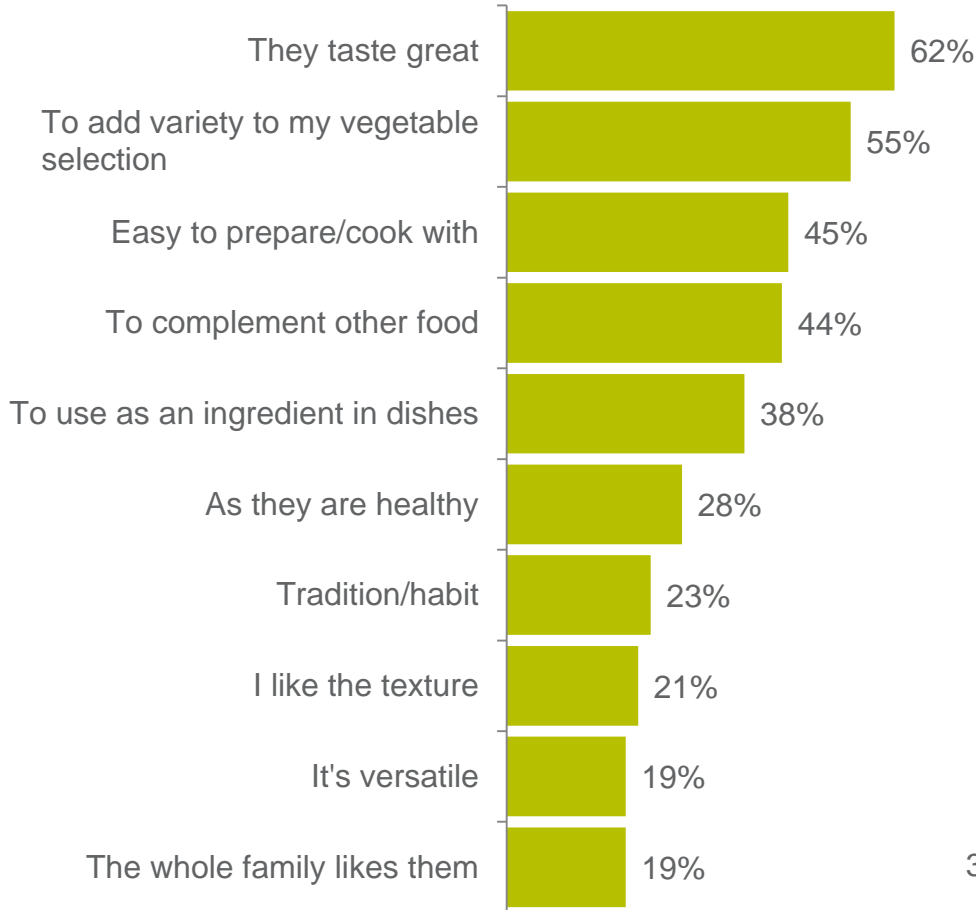
Awareness of parsnip varieties is low, with 82% of consumers unable to recall a type.



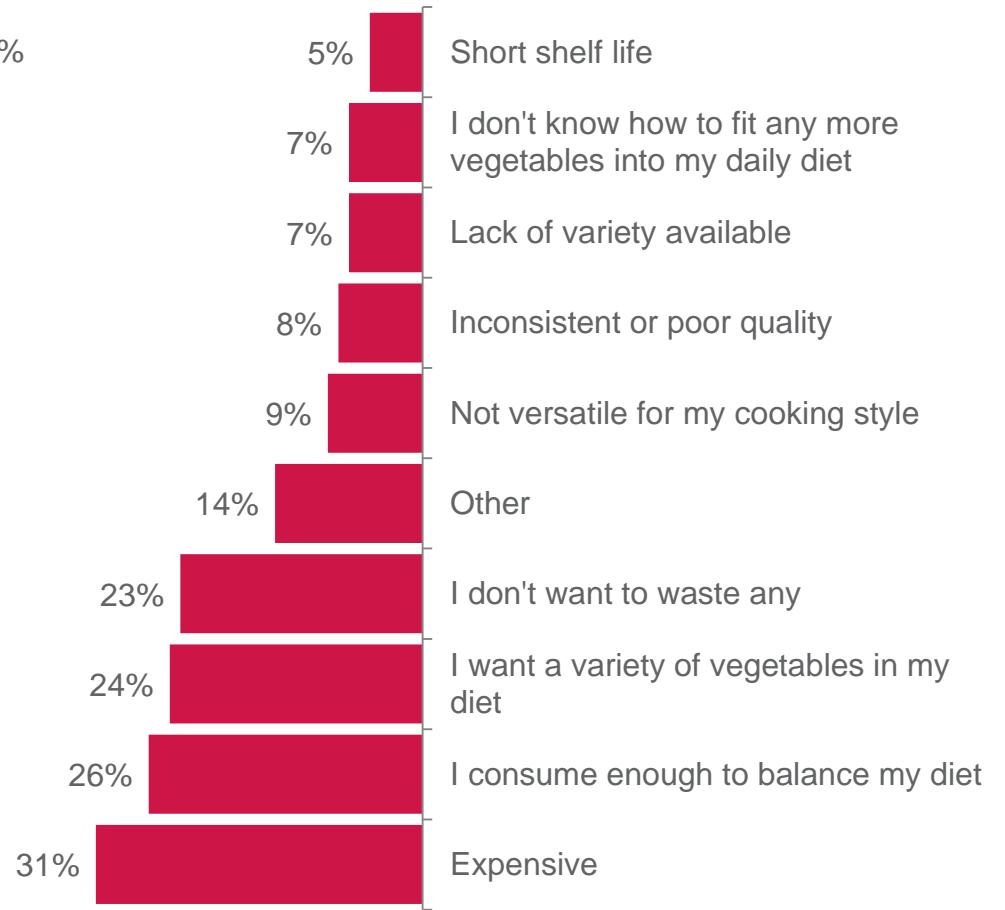


Taste and adding variety are the key barriers to purchase are expense, and feelings of already consuming enough.

Triggers



Barriers



Q7. Which of the following reasons best describes why you purchase Parsnips?
 Q8. Which reason best describes why you don't buy Parsnips more often?
 Sample Wave 28 N=206



Traditional Australian and British cuisines are most popular for parsnip dishes.

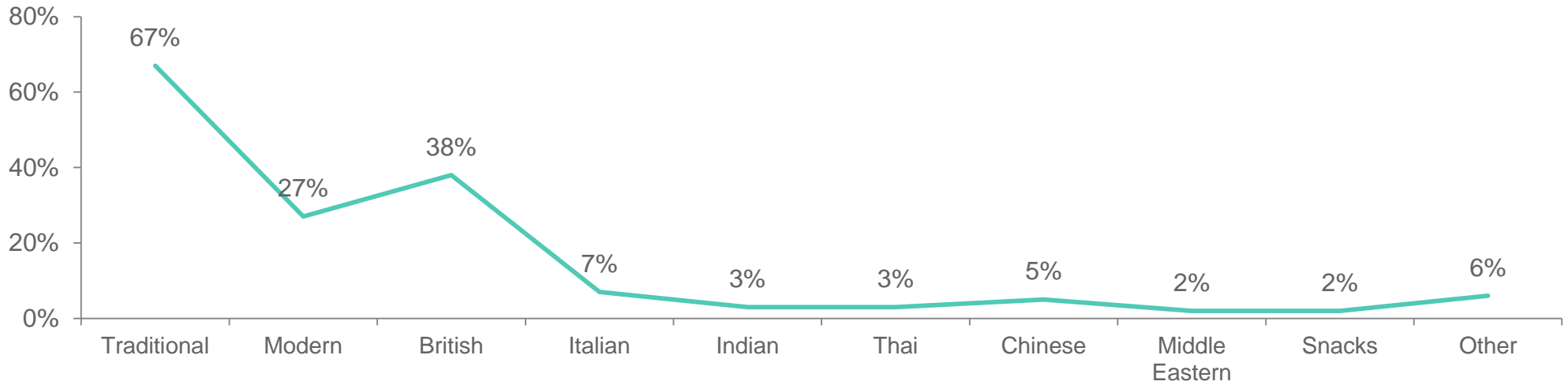
Meal occasions tend to occur during dinner and family meals.

Top 5 Consumption Occasions



Dinner	66%
Family Meals	59%
Weekend Meals	39%
Weekday Meals	31%
Special Occasions	14%

Typical Cuisine Cooked



— Wave 28: Sep-15

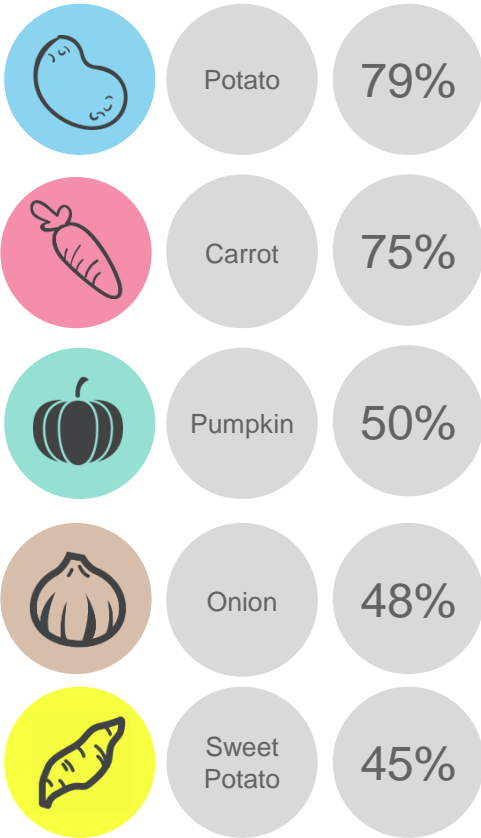


Q10. What cuisines do you cook/consume that use Parsnips?
 Q11. Which of the following occasions do you typically consume/use Parsnips?
 Sample Wave 28 N=206



Consumers prefer to serve parsnips with potatoes and carrots. Parsnips are generally roasted or cooked in soups.

Accompanying Vegetables

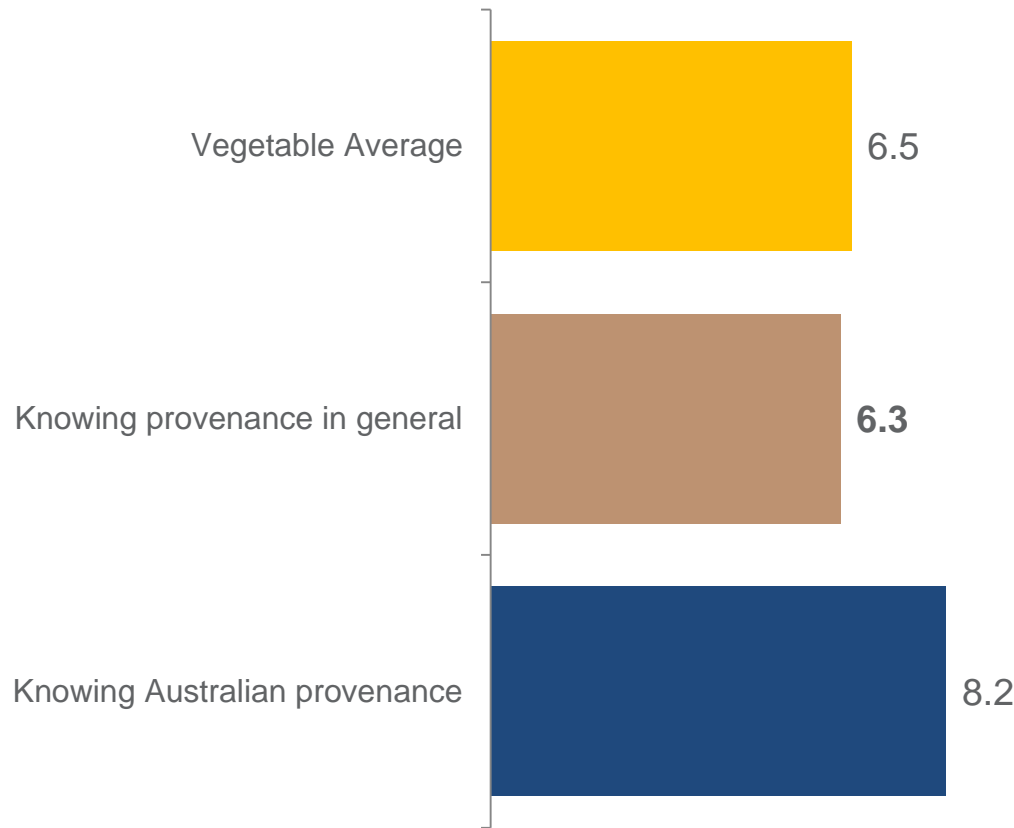


Top 10 Cooking Styles	
	Wave 28
Roasting	74%
Soup	42%
Baking	33%
Mashing	28%
Boiling	20%
Slow Cooking	17%
Steaming	15%
Stir frying	12%
Frying	7%
Sautéing	6%

Q9. How do you typically cook Parsnips?
Q10a. And when are you serving Parsnips which of the following do you also serve together with this?
Sample Wave 28 N=206



Knowing that parsnips are grown in Australia is the most important provenance information for consumers; however, knowing the provenance of parsnips in general is below the Vegetable Average.



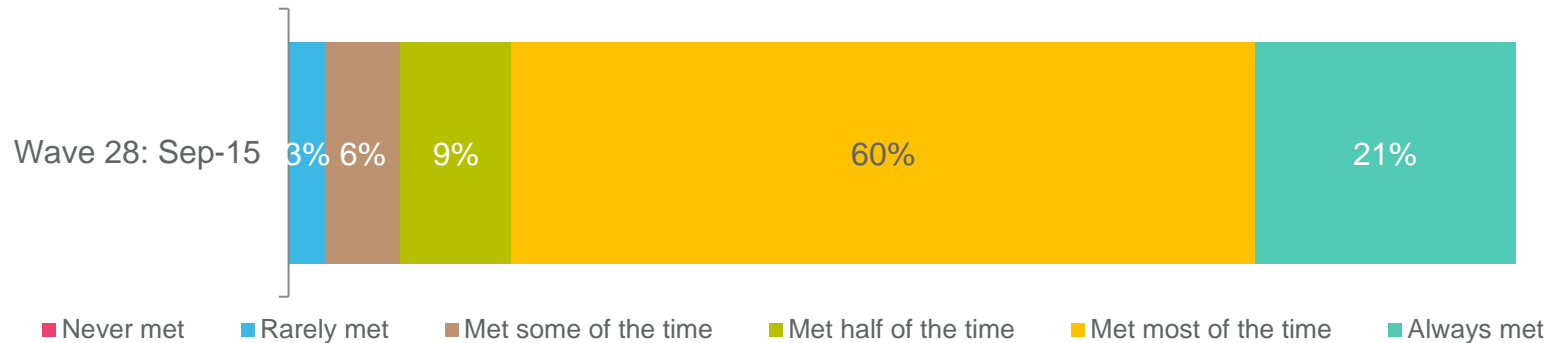
Q14. When purchasing Parsnips, how important is Provenance to you?
Q15. And when purchasing Parsnips, how important is that it is grown in Australia?
Sample Wave 28 N=206



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

Expected to stay fresh for 9.5 days

Expectations Met



Q12. How long do you expect Parsnips to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy Parsnips?
Sample Wave 28 N=206

A close-up photograph of several yellow parsnips with characteristic ribbed skin, resting on a dark wooden surface. A large, dark grey circular overlay is centered over the image, containing the title text.

Parsnip Product Launch Trends.

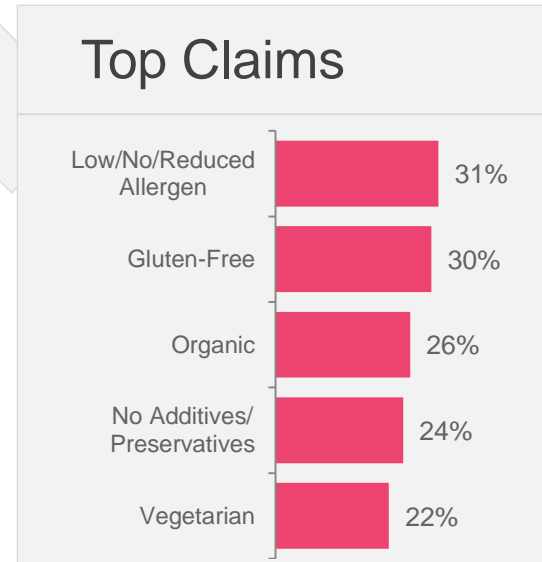
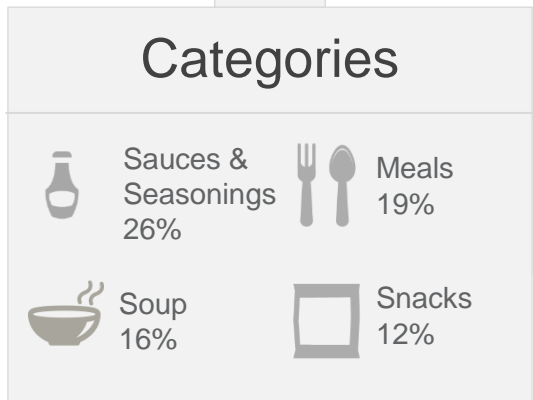
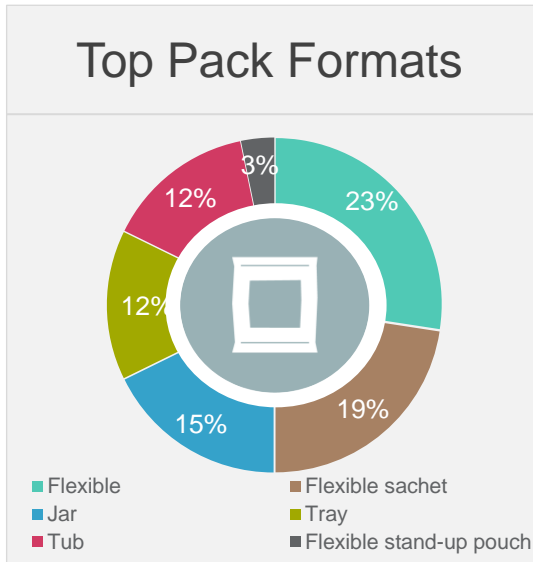
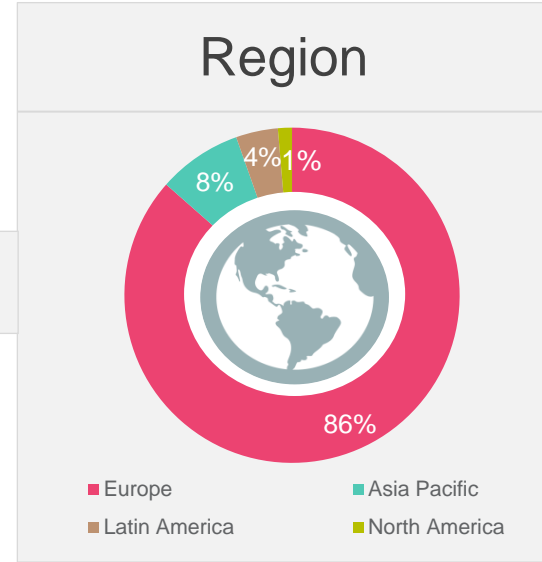
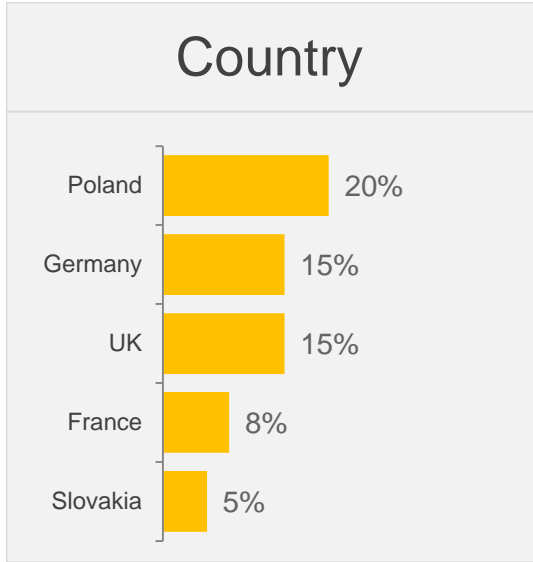
Parsnip Global Launches

July - September 2015

There were 74 parsnip products launched globally over the last three months. The majority of launches were in Poland, Germany and the UK. Categories for launches were sauces & seasonings and meals. Key packaging for parsnip products were flexible formats.



74 Global NPDs





Parsnip Product Launches: Last 3 Months (July - September 2015) Summary

- There were 74 launches in the past 3 months globally that contained parsnip as an ingredient.
- There were 2 products launched in Australia over the past three months.
- Europe (86%) was the key region for launches.
- Flexible packaging (20%) and flexible sachets (19%) were the most common format used for products.
- The main categories for launches were sauces & seasonings (26%), meals (19%) and soup (16%).
- Claims used on products highlighted health; low/no/reduced allergen (31%), gluten-free (30%), organic (26%) and no additives/preservatives (24%).
- The most innovative product launched were Beetroot, Golden Parsnip & Carrot Chips in Germany. Examples of these can be found in the following pages.



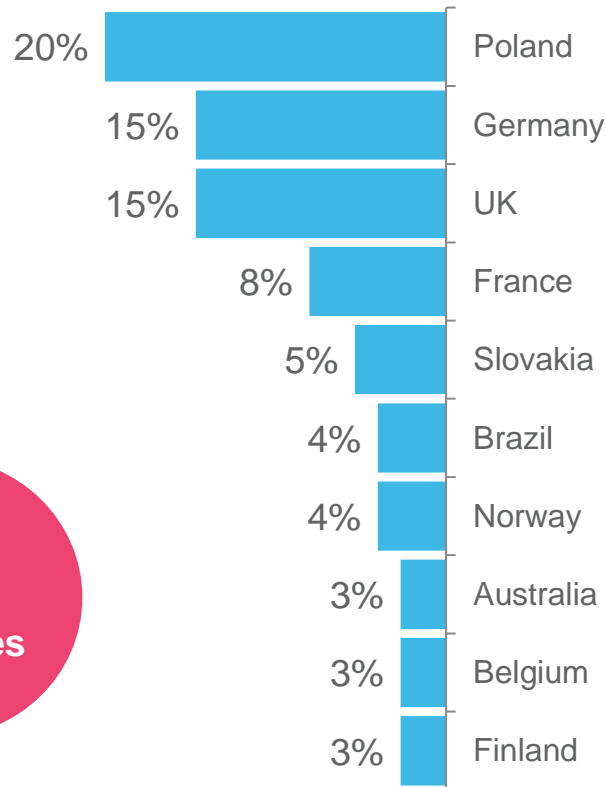
Source: Mintel (2015)



The majority of launches occurred in Poland, Germany and the UK.

The key categories for parsnip launches are sauces & seasonings, meals, soups and snack products.

Top Launch Countries



Top Launch Categories



74
Global
Launches







The main claims globally were low/no/reduced allergen, gluten free and organic.

Flexible packaging, flexible sachets and jars are consistent across regions as the main format for parsnip products.

Pack Formats Used

Global		Flexible	23%
		Flexible sachet	19%
		Jar	15%
Europe		Flexible	23%
		Flexible sachet	20%
		Jar	17%

Top Claims Used

Global		Low/No/Reduced Allergen	31%
		Gluten-Free	30%
		Organic	26%
Europe		Organic	30%
		Vegetarian	25%
		Low/No/Reduced Allergen	25%

➤➤➤ Innovative Parsnip Launches: L3M (July - September 2015)

Pamapol Meatballs in Horseradish Cream (Poland)

Pamapol Klopsiki Miesne w Kremie Chrzanowym (Meatballs in Horseradish Cream) are now available. The sterilised product comprises Polish vegetables, aromatic sauce and small pork meatballs, and retails in a 500g jar that bears a QR code.



Claims:
N/A

Kettle Vegetable Chips Beetroot, Golden Parsnip & Carrot Chips (Germany)

Kettle Vegetable Chips Chips di Rape Rosse, Rape Bianche e Carote (Beetroot, Golden Parsnip & Carrot Chips) are claimed to be made with real vegetable slices, without using artificial flavours or colours. They are suitable for both vegetarians and vegans and are sliced thicker for the "Kettle" crunch and cooked using only sunflower oil. This product is lightly salted and retails in a 125g pack.



Claims:
No Additives/Preservatives, Vegan, Vegetarian, No Animal Ingredients

Terezia Company Vegi Vegi Bio Organic Vegetable Seasoning (Czech Republic)

Terezia Company Vegi Vegi Bio Zeleninová Ochucovací Smes Bio (Organic Vegetable Seasoning) is repackaged with a new look. This seasoning blend is made with dried vegetables and sea salt, and contains no gluten, preservatives or added colours. It is suitable for refining soups, salads, sauces, rice and pasta dishes. The high fibre product is retailed in a 35g pack featuring the BIO and EU Green Leaf logos.



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

Scrubbys Three Vegetable Blend Beetroot, Carrot & Parsnip Crisps with Sea Salt (UK)

Scrubbys Three Vegetable Blend Beetroot, Carrot & Parsnip Crisps with Sea Salt are made from vegetables with their skins on to retain more of the nutrients, nature's natural goodness and fibre, and to offer whole hearted taste and flavour. The crisps are high in fibre, and free from gluten, artificial colours, flavours, preservatives, additives, GM, and MSG



Claims:
No Additives/Preservatives, Low/No/Reduced Allergen, GMO-Free, Social Media, High/Added Fiber, Vegan, Low/No/Reduced Fat, Gluten-Free, No Animal Ingredients

»»» Innovative Parsnip Launches: L3M (July - September 2015)

Boni Selection Mashed Potato with Eight Vegetables (Belgium)

Boni Selection Purée de Pommes de Terre aux 8 Légumes (Mashed Potato with Eight Vegetables) is now available. The product can be microwave heated in about four minutes, and retails in a 1kg pack.



Claims:
Microwaveable

Polskie Mlyny Barley Groats with Vegetables and Mushroom Broth (Poland)

Polskie Mlyny Kasza Jeczmienna z Warzywami i Bulionem Grzybowym (Barley Groats with Vegetables and Mushroom Broth) is now available. The product is said to be convenient as well as quick and easy to prepare in 15 minutes, and retails in a 290g pack containing two 125g groats sachets and two 20g broth pouches, and providing four servings.



Claims:
Ease of Use, Time/Speed

Maheso Seafood Paella (Mexico)

Maheso Paella de Marisco (Seafood Paella) has been repackaged in a newly designed 1kg pack featuring the manufacturer's Facebook and Twitter links. This Spanish product is said to be easy, quick and practical, and can be microwave heated.



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

Maggi Coeur de Bouillon Vegetable Stock Capsule (Belgium)

Maggi Coeur de Bouillon Légumes (Vegetable Stock Capsule) is defatted, and free from added flavour enhancers and preservatives. This product retails in a 144g pack, containing six capsules.



Claims:
No Additives/Preservatives, Low/No/Reduced Fat

»»» Innovative Parsnip Launches: L3M (July - September 2015)

Tideford Organic Beetroot Soup with Pomegranate (UK)

Tideford Organic Beetroot Soup with Pomegranate is an organic low-fat and low-salt soup, suitable for vegans, vegetarians and coeliacs, and contains no wheat, gluten, dairy or added sugar. The microwavable product contains antioxidants and retails in a 600g pack, bearing the EU Green Leaf and Soil Association logos.



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

Herzgut Wild Garlic Butter (Germany)

Herzgut Bärlauch Butter (Wild Garlic Butter) is now available with a new packaging design. This butter is naturally easy to spread and is made with premium milk. The product contains 70% fat and retails in a 125g pack.



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

Pahmeyer Frisches Vom Bauernhof Vegetable & Potato Patties (Germany)

Pahmeyer Frisches Vom Bauernhof Gemüsetaler (Vegetable & Potato Patties) have been repackaged and now retail in a newly designed 240g pack containing three units. The vegetarian product is refined with carrots and celery and can be prepared in four to 15 minutes.



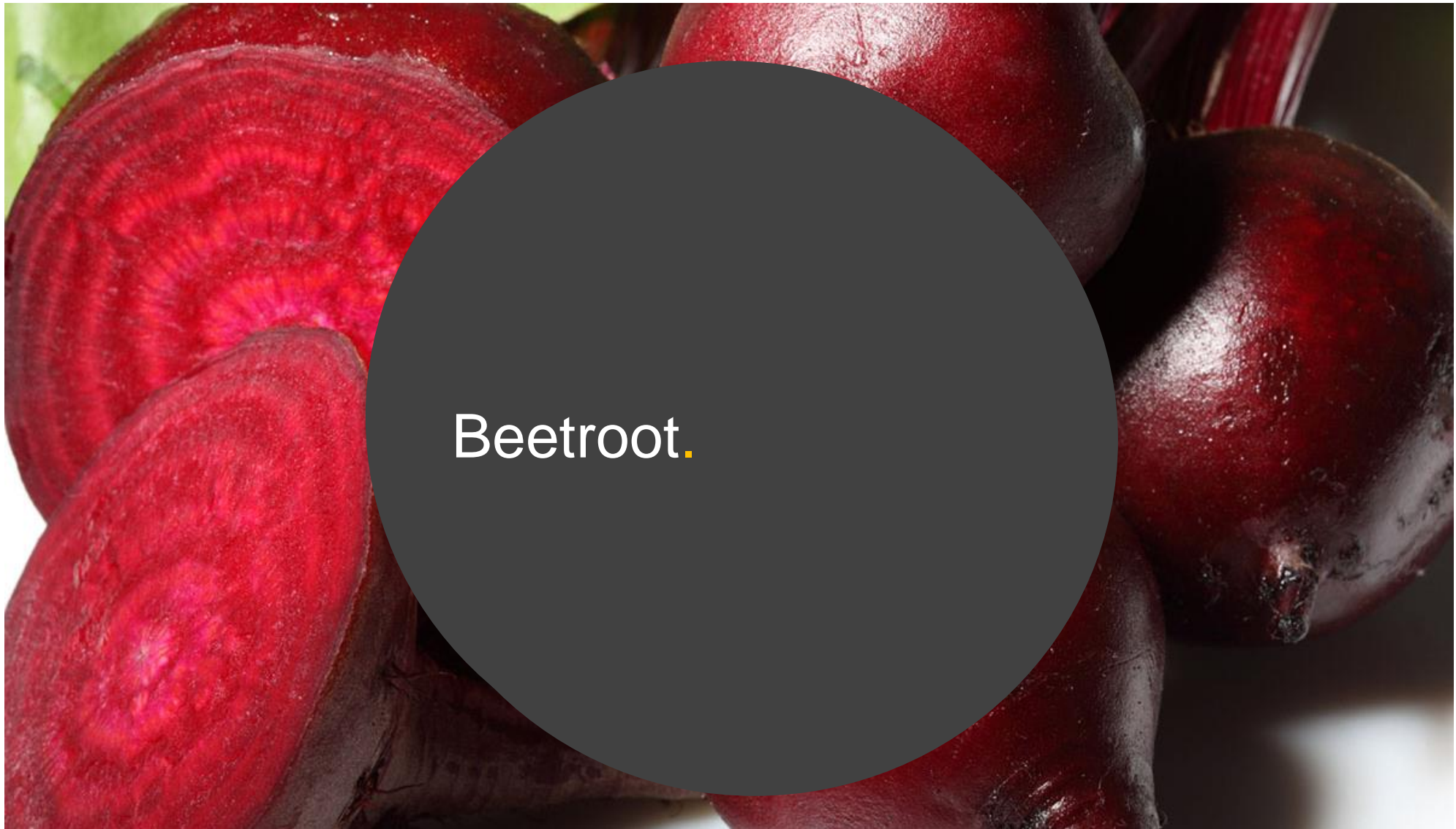
Claims:
Vegetarian

Findus Rett På Grillen Mixed Vegetables for the Grill & Oven (Norway)

Findus Rett På Grillen Grønnsaker Perfekt til Grill & Ovn (Mixed Vegetables for the Grill & Oven) comprise sweet potato, parsnip and carrot. The product retails in a 500g pack.



Claims:
NA



Beetroot.





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

There is an increase in purchase from mainstream supermarkets and specialist retailers, whilst there has been a slight decline in purchase from Aldi.

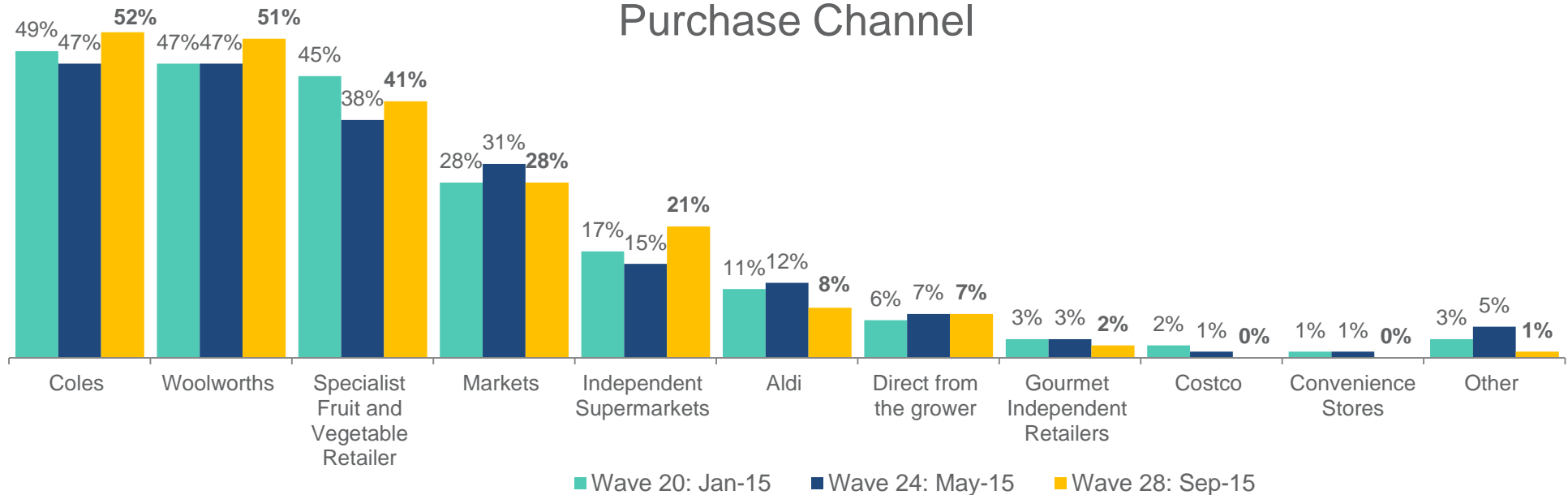


3.2 times, Wave 20
3.3 times, Wave 24



8.1 times, Wave 20
7.6 times, Wave 24

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 20 N=289, Wave 24 N=259, Wave 28 N=206



➔ There was a decrease in average last spend this wave, whilst weight of purchase and perceptions of value remained stable.



Average weight of purchase

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

— 1.0kg, Wave 20
— 1.0kg, Wave 24



Recalled last spend

The average recalled last spend is **\$3.90** in September 2015.

— \$4.30, Wave 20
▼ \$4.70, Wave 24



Value for money

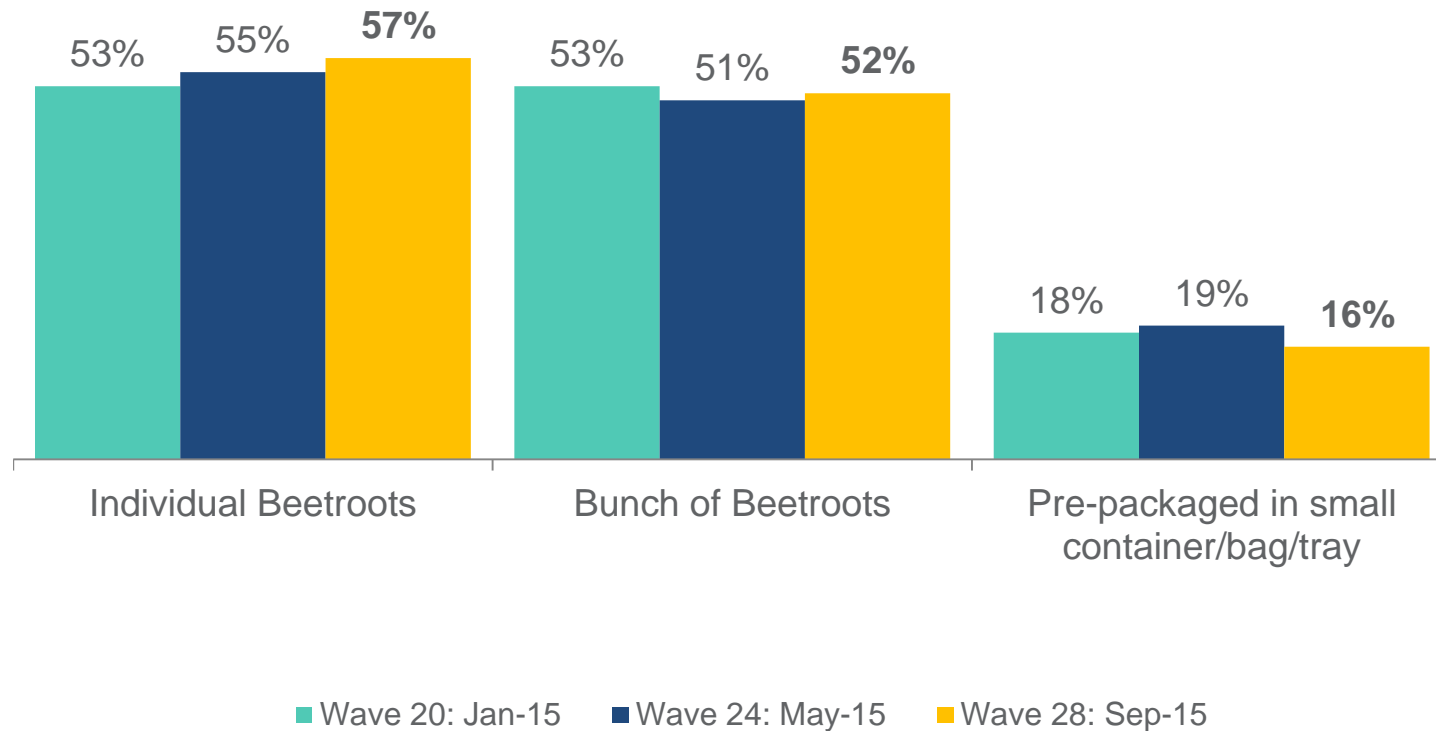
On average, consumers perceive Beetroot to be good value for money (**6.5/10**).

▼ 6.3/10, Wave 20
— 6.5/10, Wave 24

Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typical purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 20 N=289, Wave 24 N=259, Wave 28 N=206



This wave saw little change in purchase formats. Both individual and bunched beetroot formats appeal most to consumers.

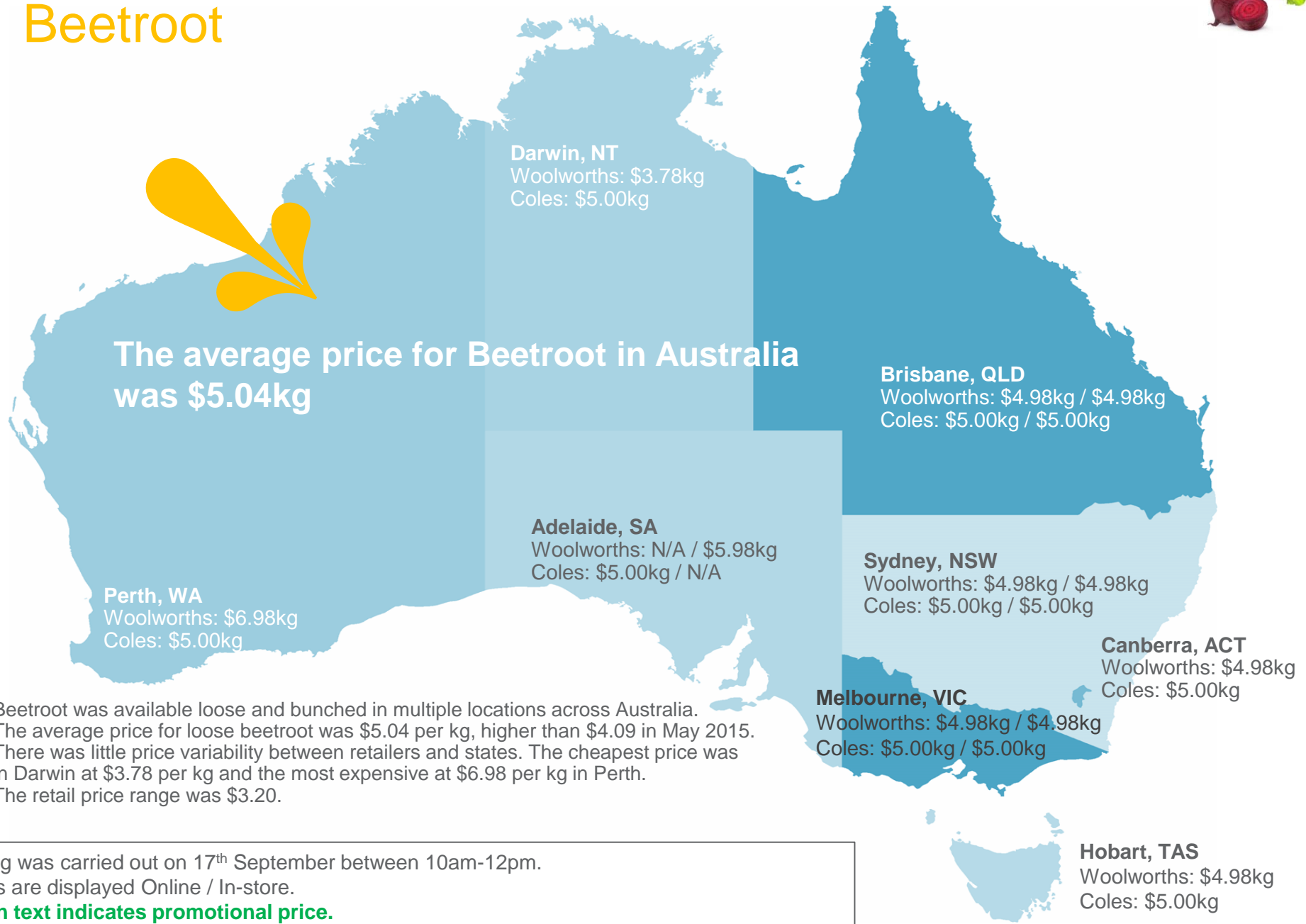


Q4b. In what fresh formats do you typically purchase Beetroot?
Sample Wave 20 N=289, Wave 24 N=259, Wave 28 N=206



Online and In-store Commodity Prices

Beetroot



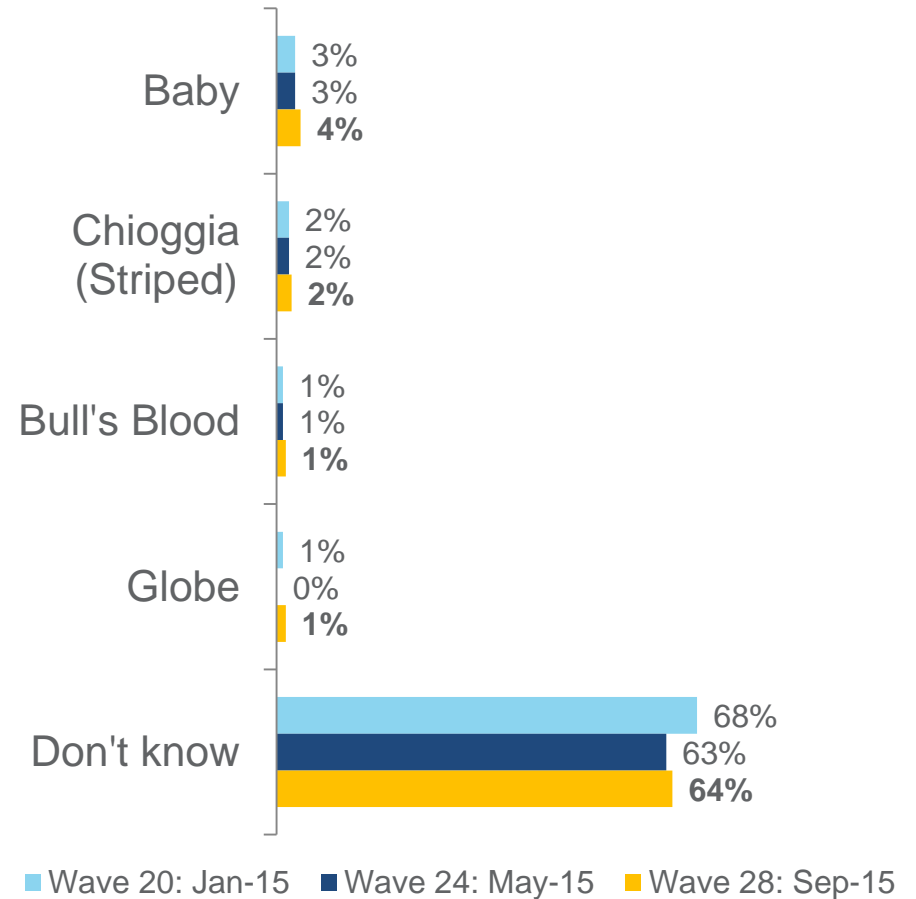
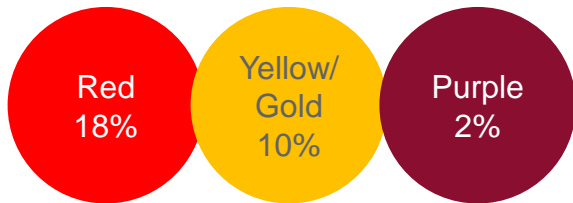
- Beetroot was available loose and bunched in multiple locations across Australia. The average price for loose beetroot was \$5.04 per kg, higher than \$4.09 in May 2015.
- There was little price variability between retailers and states. The cheapest price was in Darwin at \$3.78 per kg and the most expensive at \$6.98 per kg in Perth.
- The retail price range was \$3.20.

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



Awareness of beetroot varieties is consistently low across the waves.

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



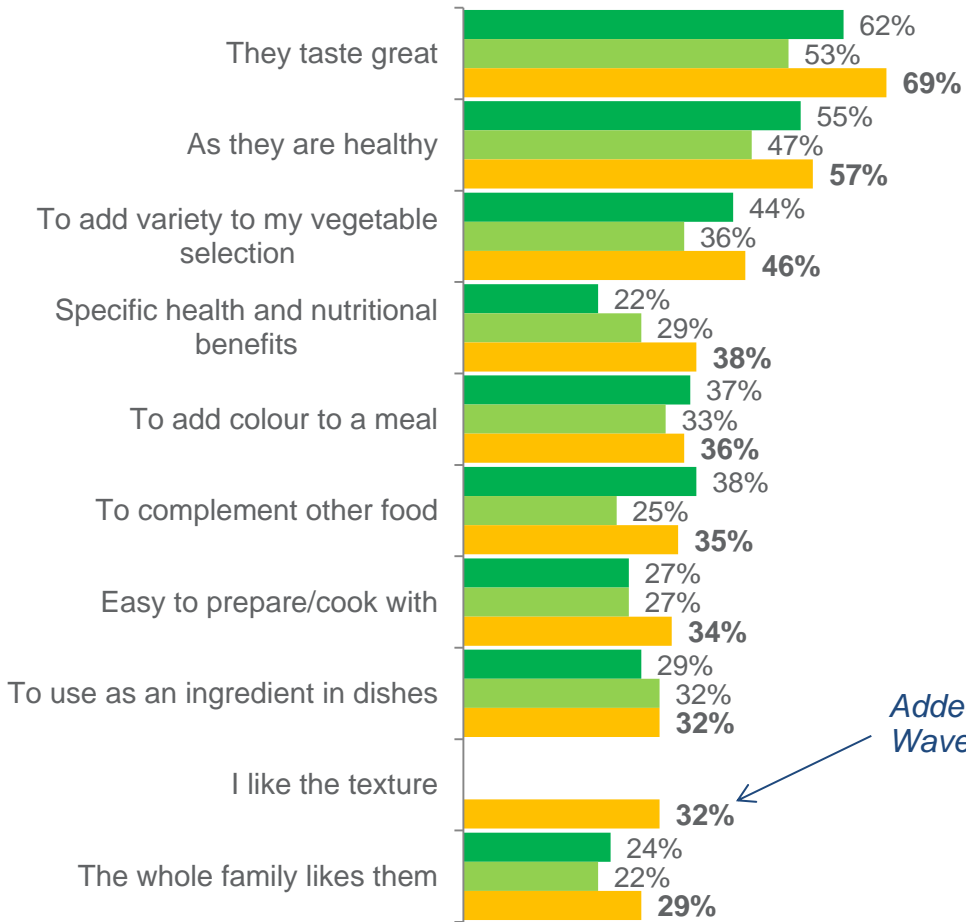
Q6a. What varieties/types of <commodity> are you aware of? (unprompted)
Sample Wave 20 N=289, Wave 24 N=259, Wave 28 N=206



Consumers purchase beetroot because it tastes great and is very healthy. Consumers list having enough for their needs and wanting variety in their diet as the key barriers to purchase.

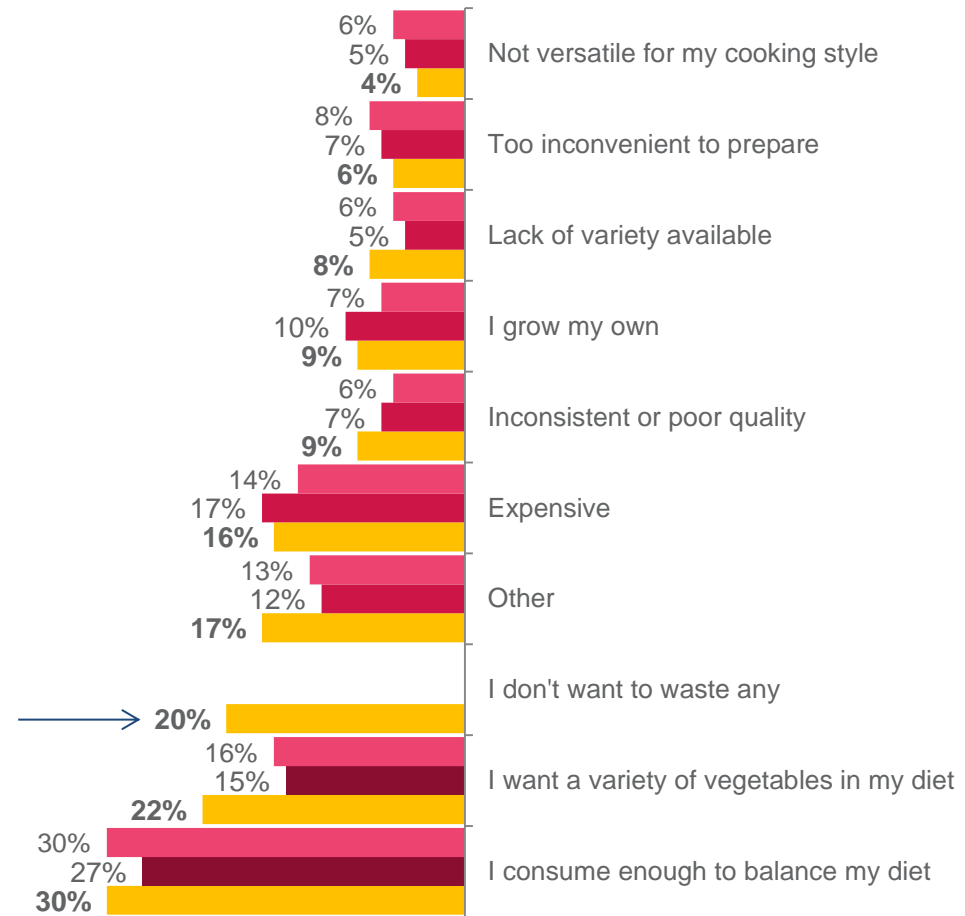


Triggers



Added in Wave 28

Barriers



■ Wave 20: Jan-15 ■ Wave 24: May-15 ■ Wave 28: Sep-15

■ Wave 20: Jan-15 ■ Wave 24: May-15 ■ Wave 28: Sep-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 20 N=289, Wave 24 N=259, Wave 28 N=206



This wave saw an increase in cooking Australian cuisines, but a decline in Indian dishes.

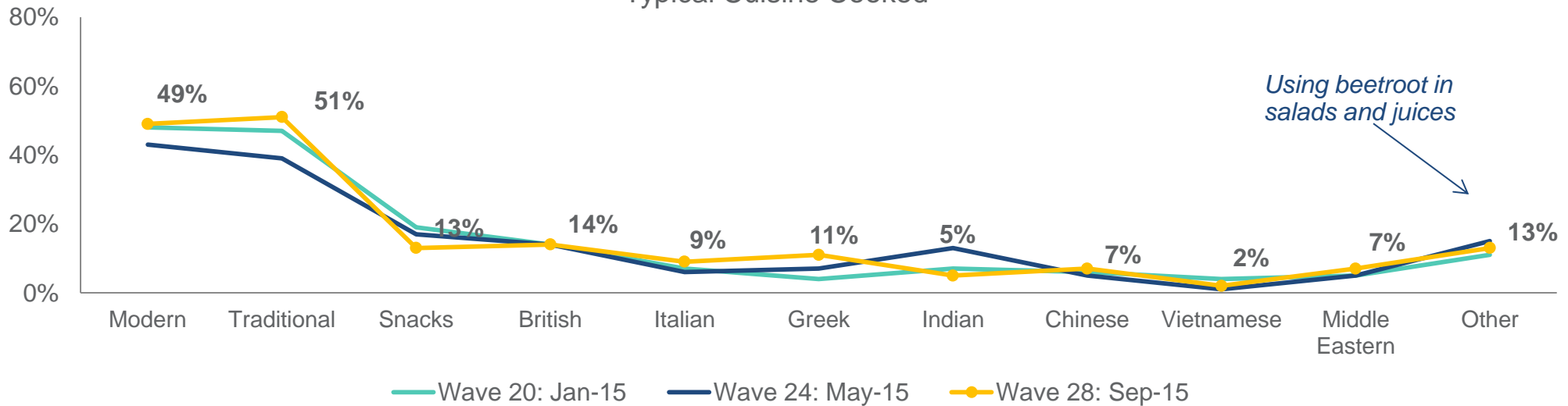
Consumption occasions are generally during dinner and family meals.



Top 5 Consumption Occasions

Wave 28	
Dinner	62%
Family Meals	58%
Lunch	43%
Weekday Meals	38%
Weekend Meals	37%

Typical Cuisine Cooked



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

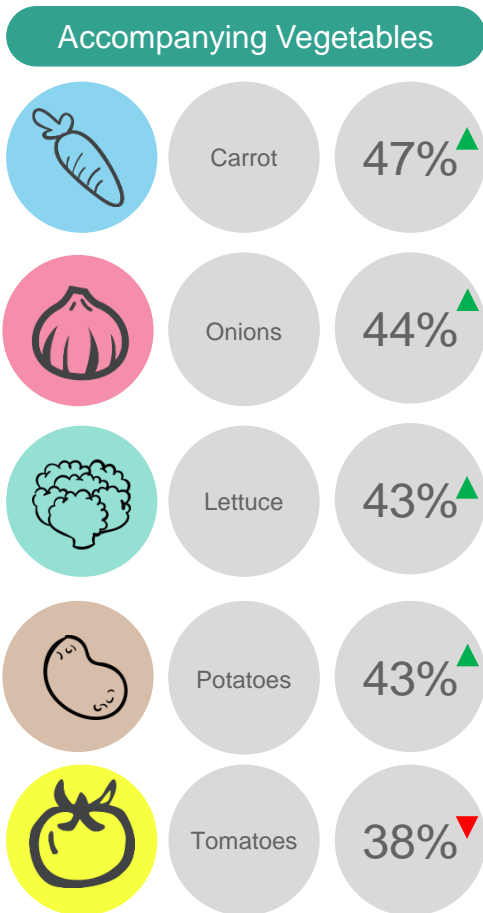
Q10. What cuisines do you cook/consume that use <commodity>?
 Q11. Which of the following occasions do you typically consume/use <commodity>?
 Sample Wave 20 N=289, Wave 24 N=259, Wave 28 N=206



The most popular cooking styles for beetroot are boiling and roasting. Steaming has consistently trended upwards over recent waves.



Consumers opt to serve beetroot with carrots, onions and lettuces, with the latter seeing a substantial increase upon the previous wave.



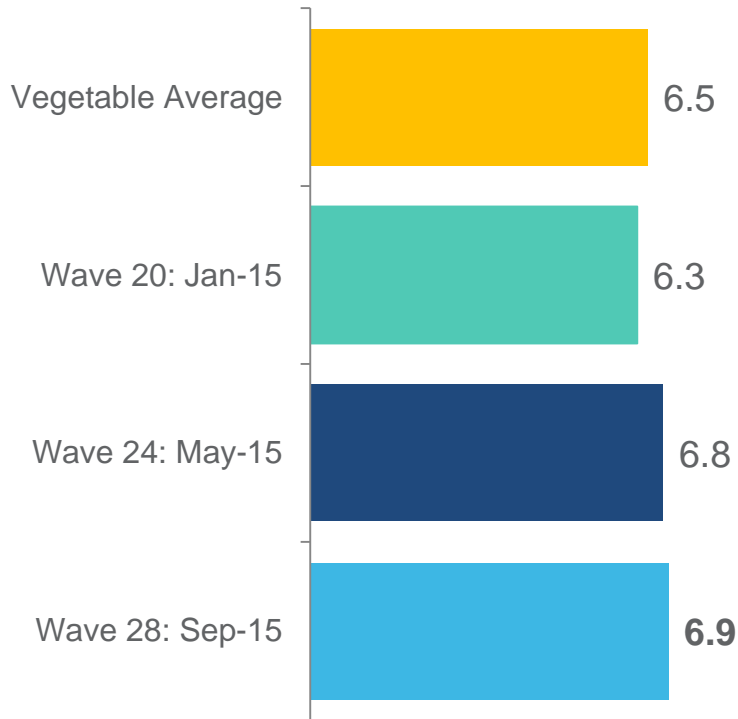
Top Cooking Styles

	Wave 20	Wave 24	Wave 28
Boiling	46%	38%	46%
Roasting	37%	37%	45%
Baking	24%	28%	27%
Raw	27%	26%	26%
Steaming	15%	16%	20%
Slow Cooking	7%	6%	14%
Soup	9%	14%	14%
Microwave	8%	6%	12%
Stir frying	7%	6%	7%
Grilling	6%	4%	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 20 N=289, Wave 24 N=259, Wave 28 N=206



Importance of Beetroot provenance has increased since the previous wave. Overall, consumers find it very important to know that beetroots are grown in Australia.



Q14. When purchasing <commodity>, how important is Provenance to you?
Mean scores out of 10.
Sample Wave 20 N=289, Wave 24 N=259, Wave 28 N=206



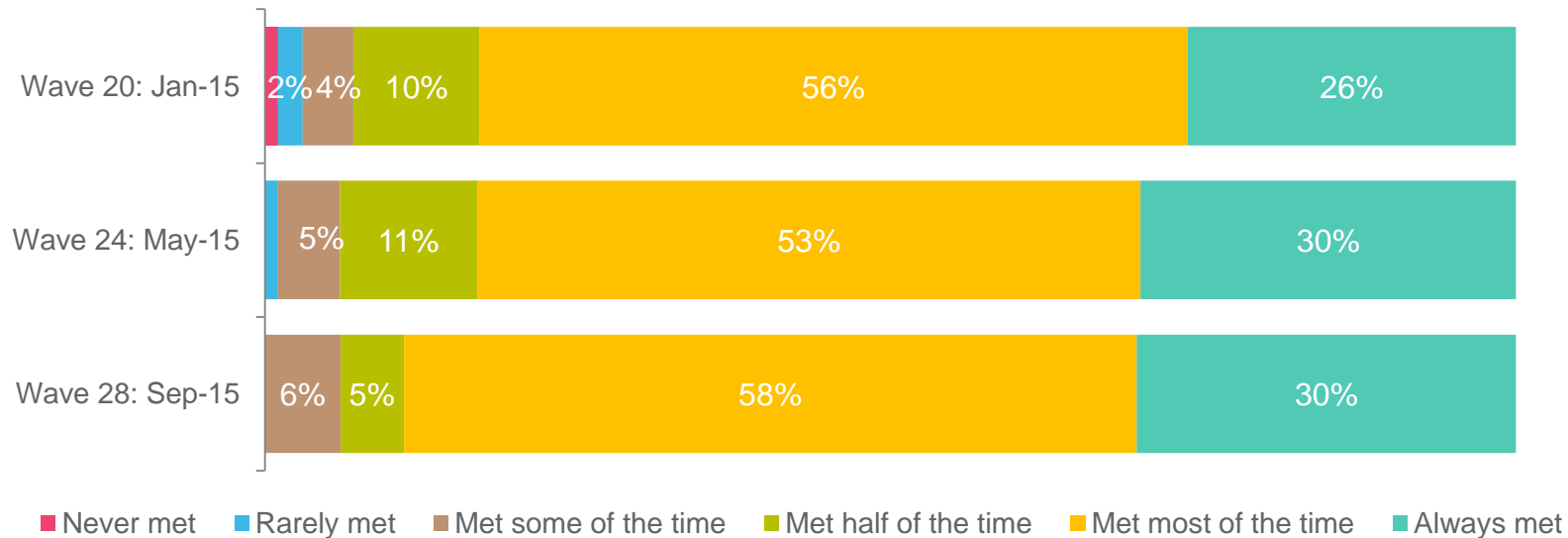
Consumers expect beetroot to remain fresh for over 10 days once purchased.

Freshness expectations have improved over recent waves and are being met at least most of the time.

Expected to stay fresh for 10.3 days

- ▲ 10.9 times, Wave 20
- ▲ 10.4 times, Wave 24

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 20 N=289, Wave 24 N=259, Wave 28 N=206



Trends: Beetroot



Beetroot Global NPDs

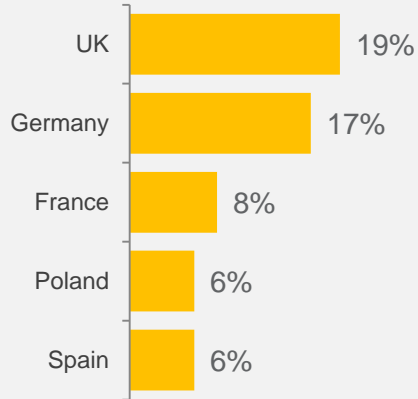
July - September 2015

There were 522 products containing beetroot as an ingredient launched globally in the last three months. The majority of these launches occurred in Europe, in particular UK and Germany, which was consistent with past trends. Products were launched in desserts, dairy, bakery and snacks. Health claims were frequently used on product labelling.

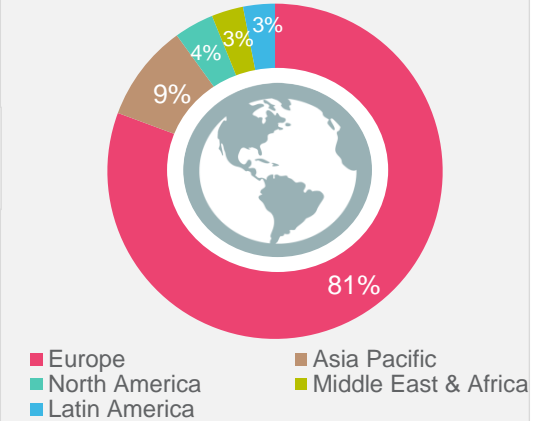


522 Global Launches

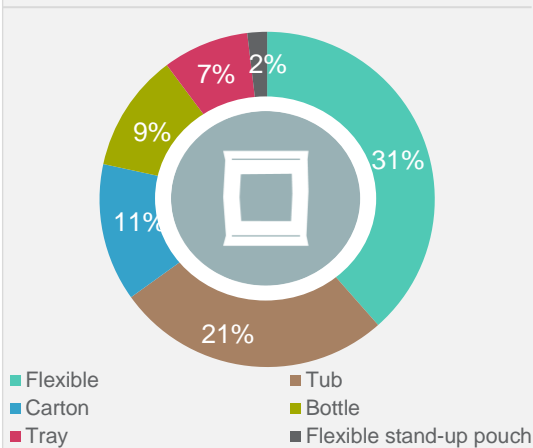
Country



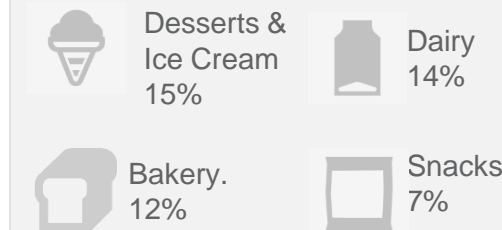
Region



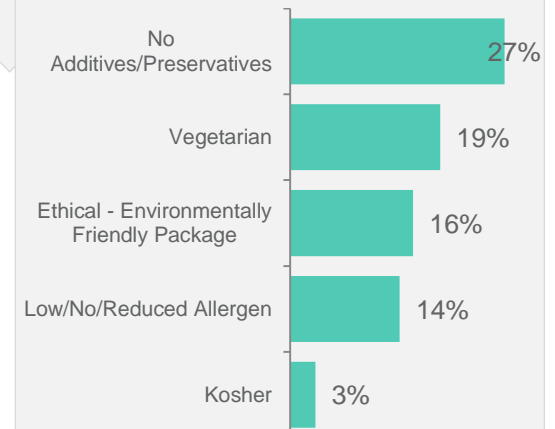
Top Pack Formats



Categories



Top Claims





Beetroot Product Launches: Last 3 Months (July - September 2015) Summary

- There were 522 global beetroot products launched globally over the last three months.
- There were 10 products launched in Australia this wave.
- The majority of products were launched in Europe (81%). Key countries for launches were the UK (19%) and Germany (17%), consistent with previous trends.
- Flexible packaging was the most common format used (31%). Tubs were also popularly utilised (21%).
- Top launch categories were Desserts and Ice Creams (15%), Dairy (14%) and Bakery items (12%). It appears that beetroot is largely used as a colouring for desserts, ice-creams and dairy.
- Popular claims were around no additives/preservatives (27%), vegetarian (19%) and ethical/environmentally friendly packaging (16%).
- The most innovative beetroot product launched was a beetroot juice from USA (examples of these can be found in the following pages).



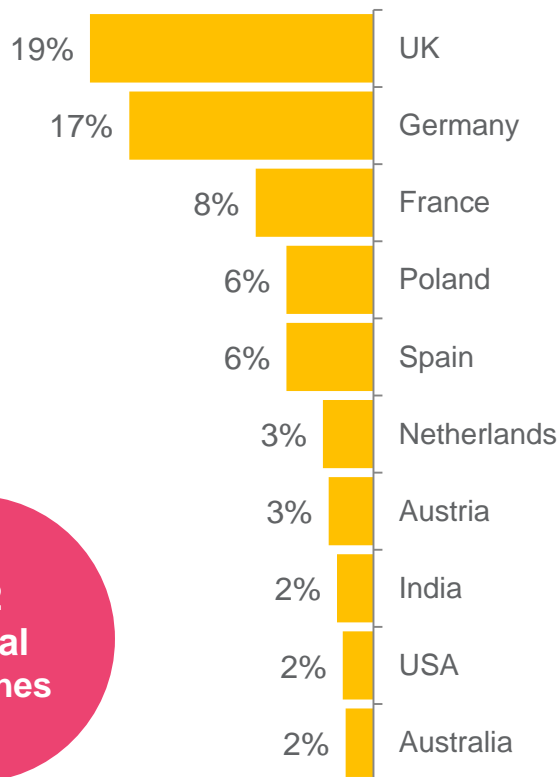
Source: Mintel (2015)



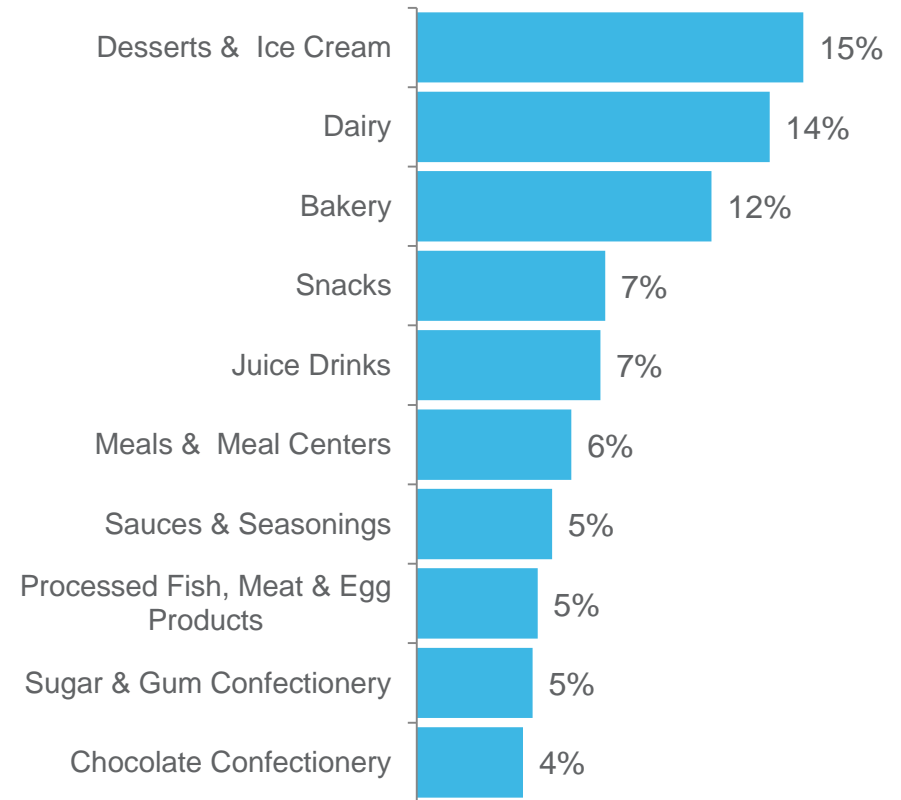


UK and Germany were the main countries for launches. Over the past three months, desserts & ice cream, dairy, bakery, and snacks were the key categories for products launched.

Top Launch Countries



Top Launch Categories



522
Global
Launches























Flexible packaging, tubs and cartons were the main formats used for products launches.

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

Pack Formats Used

Global		Flexible	31%
		Tub	21%
		Carton	11%
Europe		Flexible	28%
		Tub	25%
		Carton	11%
Asia Pacific		Flexible	35%
		Bottle	20%
		Carton	14%

Top Claims Used

Global		No Additives/Preservatives	27%
		Vegetarian	19%
		Ethical - Environmentally Friendly Package	16%
Europe		No Additives/Preservatives	25%
		Ethical - Environmentally Friendly Package	19%
		Vegetarian	18%
Asia Pacific		No Additives/Preservatives	63%
		Vegetarian	39%
		Social Media	27%

Only regions with n >30 are displayed

»»» Innovative Beetroot Launches: L3M (July - September 2015)

Compal Veggie Beetroot & Apple Juice (Portugal)

Compal Veggie Sumo de Beterraba e Maçã (Beetroot & Apple Juice) is described as a fluid juice with an intense and unusual taste.

The product is partially made with concentrate, and retails in a FSC-certified 1L pack.



Claims:
Ethical - Environmentally Friendly Package

Atria Velvety Beetroot & Goat's Cheese Soup (Finland)

Atria Samettinen Punajuuri-Vuohenjuusto Keitto (Velvety Beetroot & Goat's Cheese Soup) is made from Kasvis Gallerian vegetables and Juustoporttin cheeses. The microwaveable product is free from lactose and gluten, and retails in a 300g pack featuring the Blue Swan label.



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

Conservas Beira Rio Beetroot in Brine (Brazil)

Conservas Beira Rio Beterraba em Conserva Suave (Beetroot in Brine) is now available. The product is free from gluten and retails in a 550g jar.



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

Avoca To Go Beetroot, Caraway & Creme Fraiche Soup (Ireland)

Avoca To Go Beetroot, Caraway & Creme Fraiche Soup is now available. The product is suitable for home freezing, said to have the taste of summer, and retails in a 580g pack.



Claims:
Seasonal, On-the-Go

»»» Innovative Beetroot Launches: L3M (July - September 2015)

Almondy Raspberry & Salty Liquorice Mousse Cake (Denmark)

Almondy Hindbærsallkridsmousetærte (Raspberry & Salty Liquorice Mousse Cake) is now available. It is described to be a lively mousse tart with an almond base with a delicious salty liquorice cream and wonderful sweet raspberry mousse, covered with salty liquorice coating and topped with raspberry crisp. The gluten-free product is halal certified and said to be a delicious flavour combination, and retails in a 400g pack.



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

Beet Performer Beet Juice with B12 (USA)

Beet Performer Beet Juice with B12 is described as an endurance enhancing body fuel which stimulates stamina and strength. Beets are high in nitrates which act like couriers to quickly deliver oxygen to muscles and also aid in cardiovascular wellness with their heart-healthy vitamins, minerals and antioxidants. The vegan product contains 100% juice and no caffeine, added sugar or gluten, and retails in an 8.4-fl. oz. recyclable can.



Claims:
Low/No/Reduced Allergen, Caffeine Free, Other (Functional), Ethical - Environmentally Friendly Package, Time/Speed, Low/No/Reduced Sugar, Gluten-Free, No Animal Ingredients, Antioxidant, Vegan, Cardiovascular (Functional)

Scrubbys Sweet 'n' Beet Sweet Potato & Beetroot Crisps with Sea Salt (UK)

Scrubbys Sweet 'n' Beet Sweet Potato & Beetroot Crisps with Sea Salt is described as a superfood mix that is high in fibre, and free from gluten, artificial colours, flavours, preservatives, additives, GM, and MSG. The vegan product is lower in fat, made from vegetables with their skins on to retain more of the nutrients, nature's natural goodness and fibre, and to offer whole hearted taste and flavour.



Claims:
No Additives/Preservatives, Low/No/Reduced Allergen, GMO-Free, Social Media, High/Added Fiber, Vegan, Low/No/Reduced Fat, Gluten-Free, No Animal Ingredients

Natsu True Freshness Beetroot Salad with Goat's Cheese (Germany)

Natsu True Freshness Rote Bete Mit Ziegenkäse (Beetroot Salad with Goat's Cheese) comprises cooked beetroot, cooked durum wheat semolina, lime dressing, goat's cheese preparation with crisp apples, honey and fresh mint. This salad needs to be stirred instead of shaken and retails in a 250g pack providing one portion.



Claims:
N/A

»»» Innovative Beetroot Launches: L3M (July - September 2015)

Yeti Candy Floss Ice Cream (France)

Yeti Glace Barbe à Papa (Candy Floss Ice Cream) is now available. This product comprises candy floss flavoured ice cream with pearls of sugar, and retails in a 900ml pack .



Claims:
N/A

Asda Chosen by You Vegetarian Beetroot & Goats' Cheese Roasts (UK)

Asda Chosen by You Vegetarian Beetroot & Goats' Cheese Roasts have been reformulated with a new and improved recipe. The vegetarian product is made with beetroot, carrots, rehydrated bulgar wheat, spinach, a tangy splash of balsamic vinegar and a drizzle of honey topped with goats' cheese, and can be oven cooked from frozen in 25 minutes.



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

Le Gusto Italian Style Salad Sauce Mix with Balsamic Vinegar (Iran)

Le Gusto Fix für Salat-Sauce Italienische Art mit Balsamicoessig (Italian Style Salad Sauce Mix with Balsamic Vinegar) is now available. This product is free from flavourings, colourings and flavour enhancers and retails in a pack with five 8g packs, each sufficient for preparing 90ml salad sauce.



Claims:
No Additives/Preservatives

Ketch'up Beetroot Ketchup (UK)

Ketch'up Beetroot Ketchup is described as natural and delicious. This vegetarian product is free from gluten, additives and colourants. It retails in a 23cl bottle.



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



Australian Beetroot Launches: L3M (July - September 2015)

Yolo Blueberry Beet Cold Pressed Juice



Chris' Egyptian Beetroot Dip



Nectar Cold Pressed Up Beet Carrot, Beetroot, Apple, Celery, Lemon and Ginger Nectar



Yummia Strawberry & Beetroot Layered Yogurt



Campbell's Real Soup Base Moroccan Soup Base



Fiddes Payne Princess Carriage Cup Cake Kit



A close-up photograph of several sweetpotatoes with reddish-brown skin and some yellowish-orange spots. A large, dark grey circle is overlaid in the center of the image.

Sweetpotatoes.



Consumption and purchase have both increased this wave.



Consumers purchase sweetpotatoes from mainstream and specialist retailers; however, the latter channel has slowly declined over recent waves.

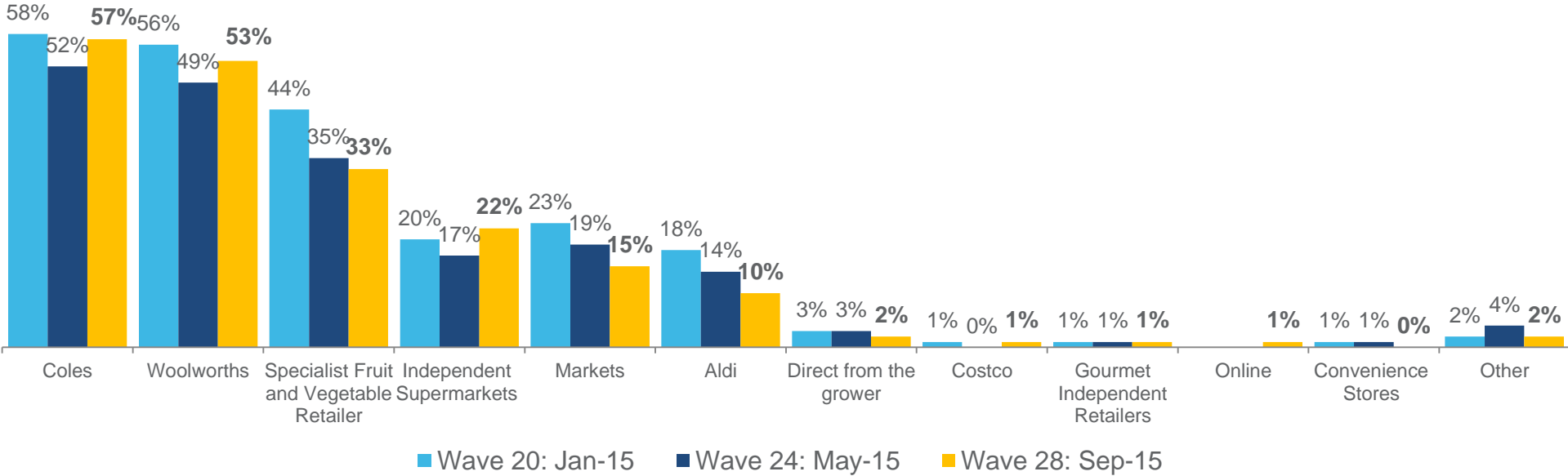


▼ 3.3 times, Wave 20
▼ 3.1 times, Wave 24



▲ 7.9 times, Wave 20
▼ 7.0 times, Wave 24

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 20, N=353, Wave 24, N=307, Wave 28, N=206



Perceived value for money remained steady, with weight of purchase returning to levels found in Wave 20. However, recalled last spend continues to decline.



Average weight of purchase

The average consumer typically purchased **1.1kg** of sweetpotatoes in September 2015.

- 1.1kg, Wave 20
- ▼ 1.0kg, Wave 24



Recalled last spend

The average recalled last spend for sweetpotatoes was **\$3.20**.

- ▲ \$4.00, Wave 20
- ▲ \$3.50, Wave 24



Value for money

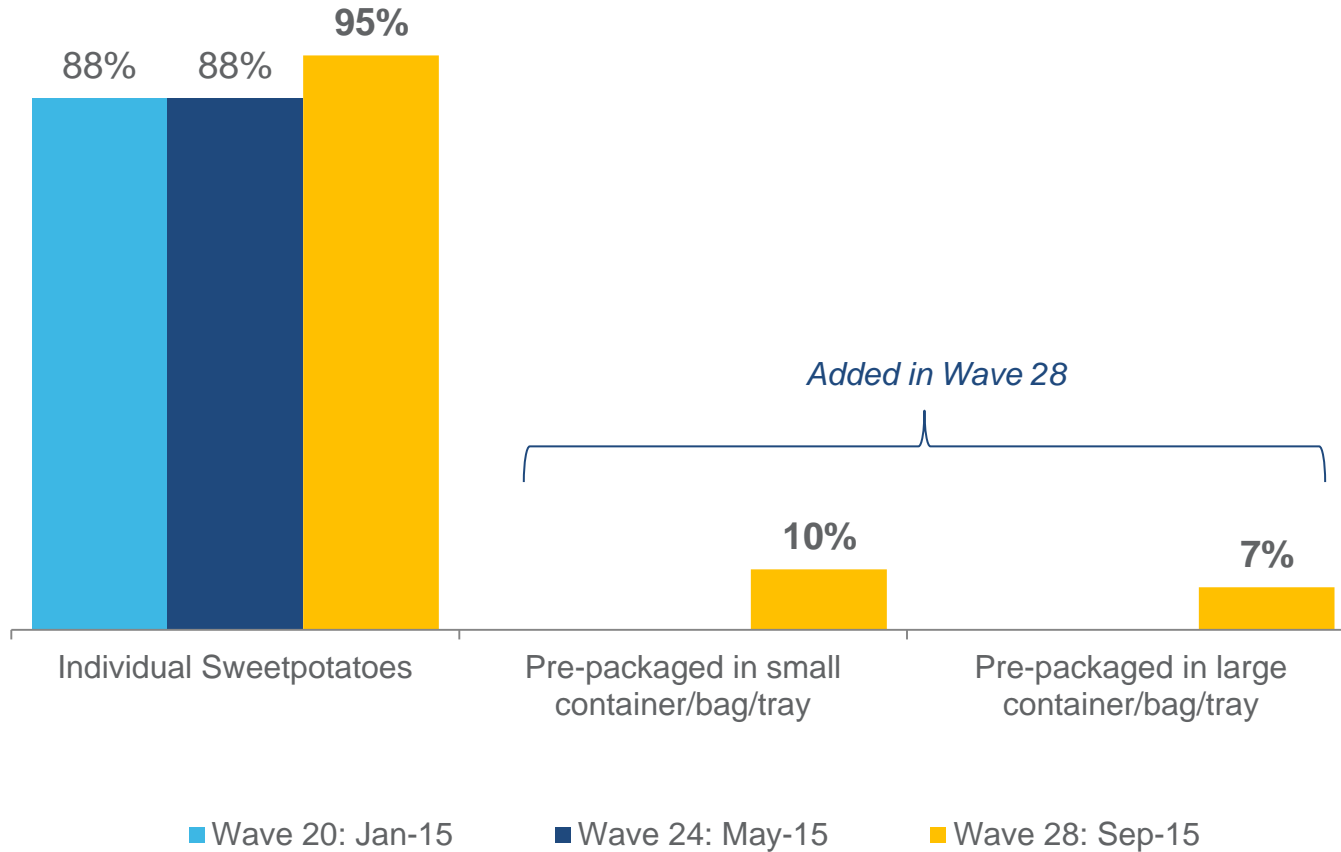
On average, consumers perceived sweetpotatoes to be good value for money (**6.6/10**).

- 6.6/10, Wave 20
- 6.6/10, Wave 24

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 20, N=353, Wave 24, N=307, Wave 28, N=206



The majority of consumers are purchasing individual sweetpotatoes, consistent with previous waves.

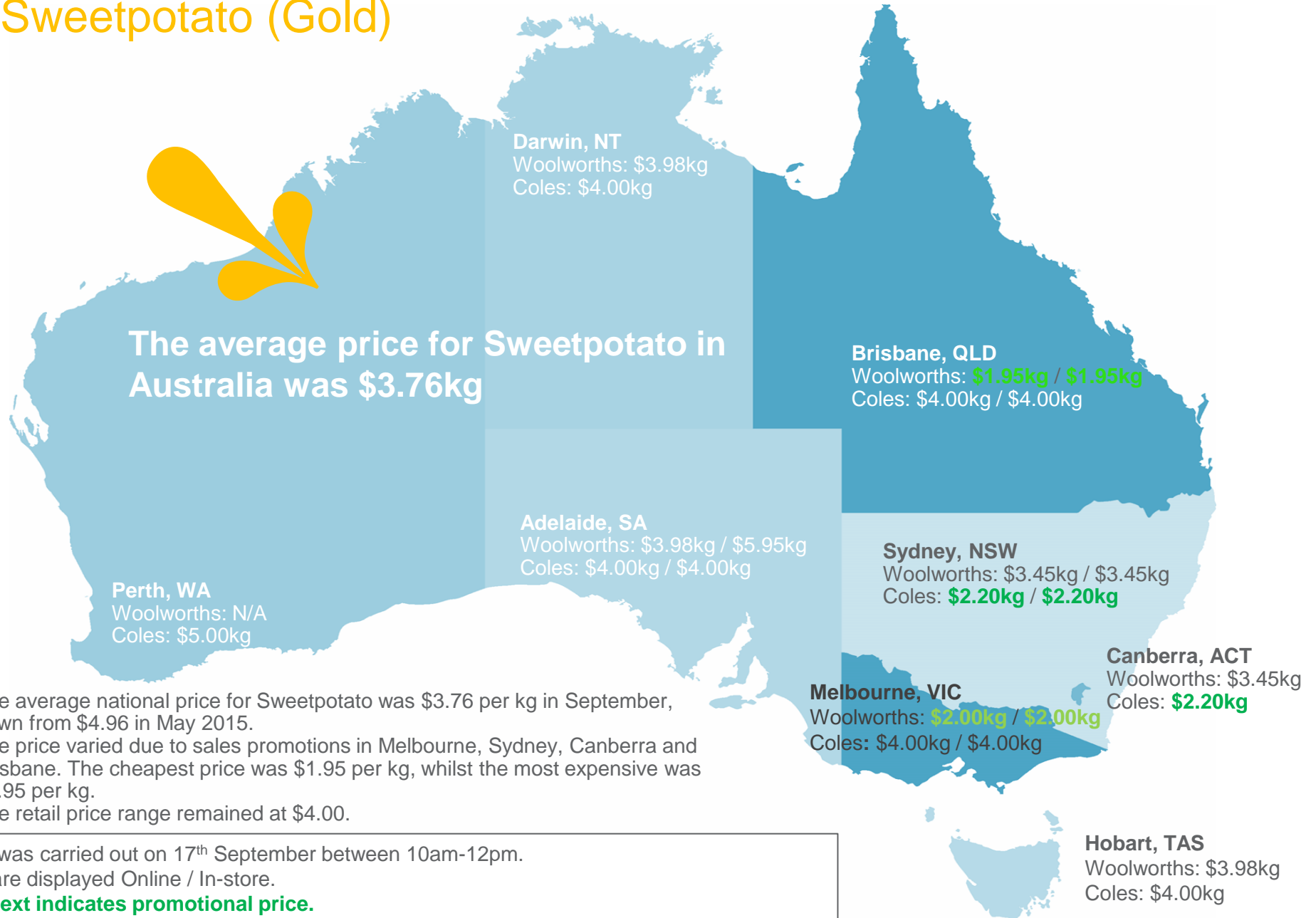


Q4b. In what fresh formats do you typically purchase Sweetpotato?
Sample Wave 20, N=353, Wave 24, N=307, Wave 28, N=206

Online and In-store Commodity Prices



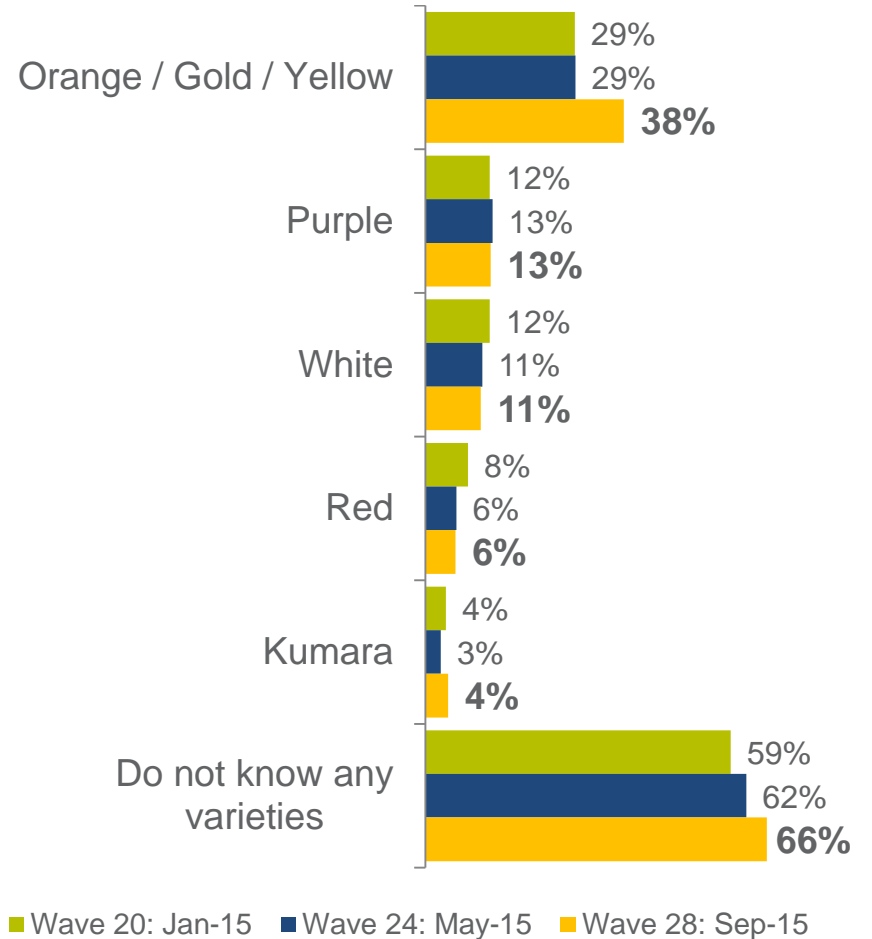
Sweetpotato (Gold)





Two thirds of consumers are unable to recall a type of sweetpotato, increasing upon previous waves.

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

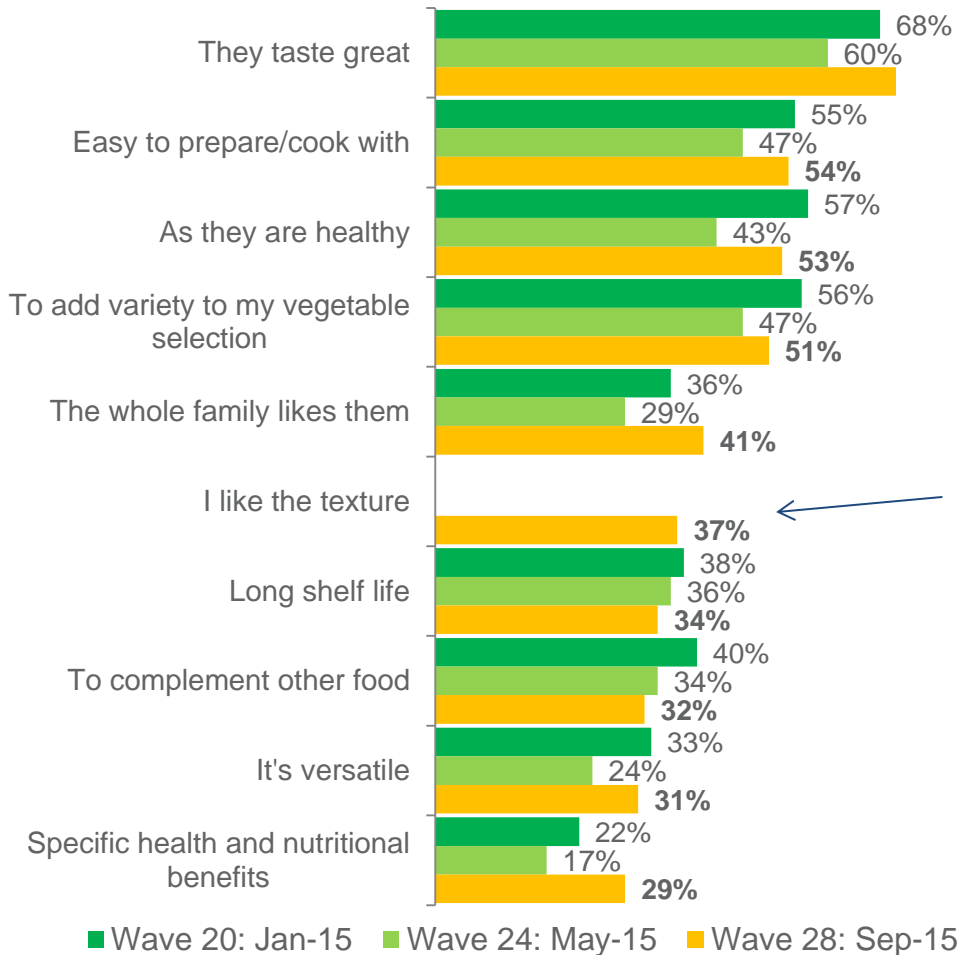


Q6a. What varieties of <commodity> are you aware of? (unprompted)
Sample Wave 20, N=353, Wave 24, N=307, Wave 28, N=206

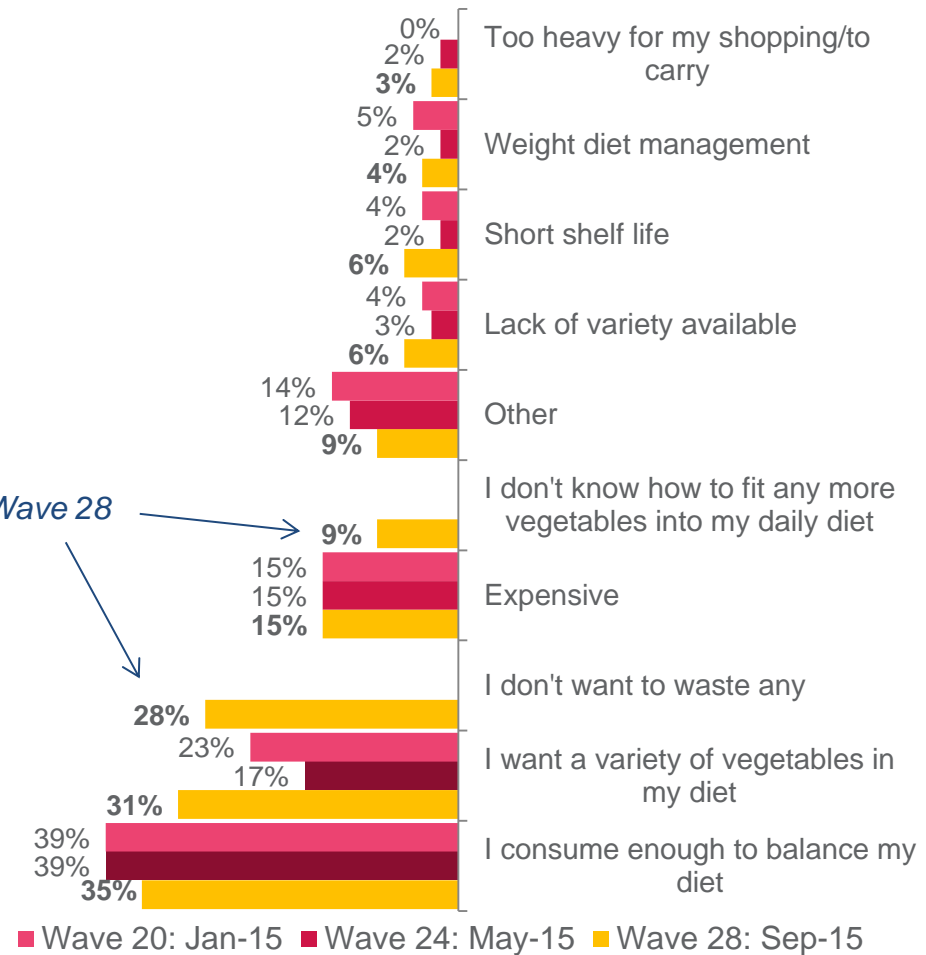


Taste, ease of preparation and health are the key drivers for sweetpotato purchases. Already consuming enough and wanting a variety of vegetables are the key barriers to purchase.

Triggers



Barriers



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 20, N=353, Wave 24, N=307, Wave 28, N=206

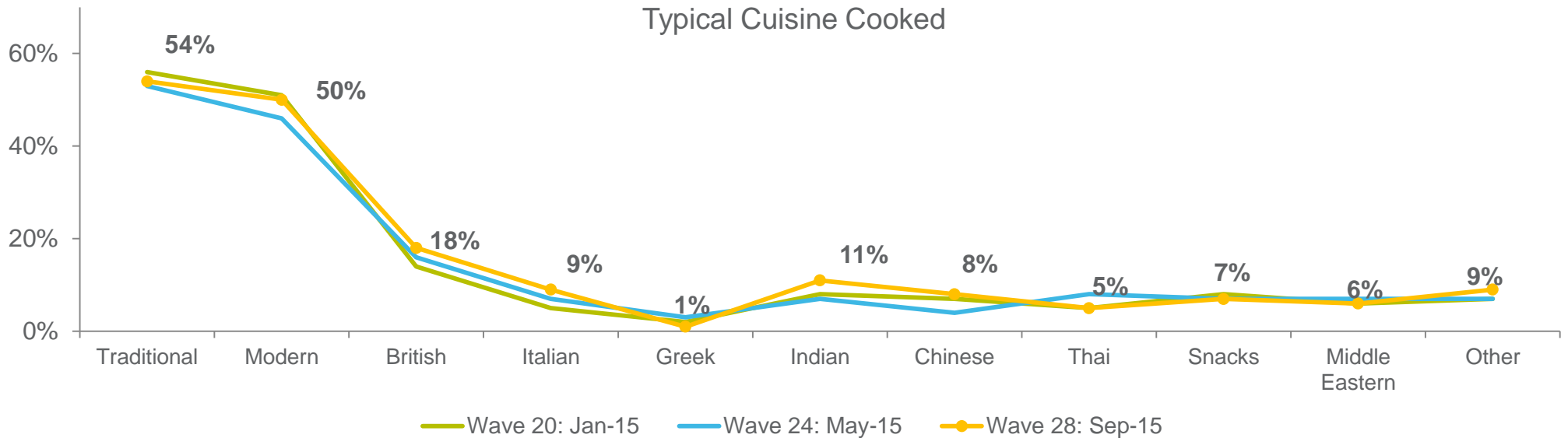


Sweetpotato cooking and consumption is heavily skewed towards Australian dinner occasions. Currently there is minimal cuisine repertoire for sweetpotato.

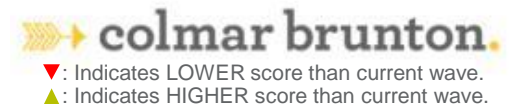


Top 5 Consumption Occasions

Wave 28	
Dinner	73%
Family Meals	68%
Weekday Meals	41%
Weekend Meals	38%
Quick Meals	17%

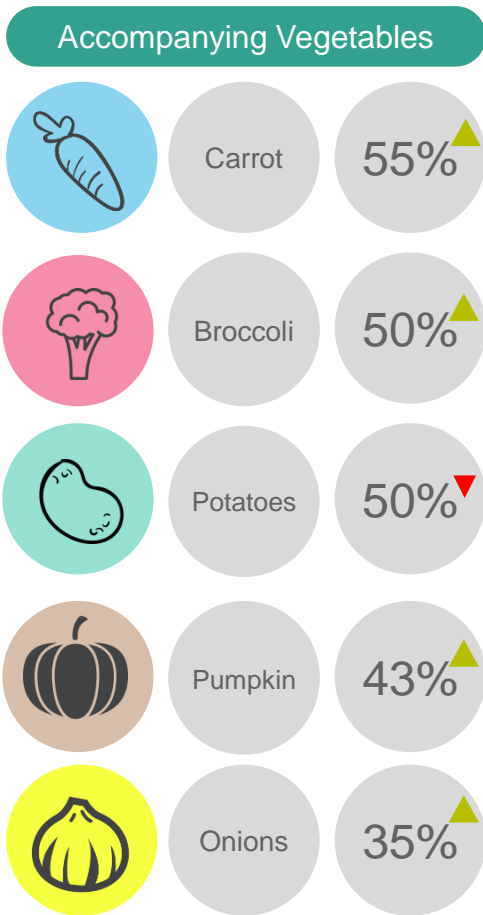


Q10. What cuisines do you cook/consume that use <commodity> ?
 Q11. Which of the following occasions do you typically consume/use <commodity> ?
 Sample Wave 20, N=353, Wave 24, N=307, Wave 28, N=206





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

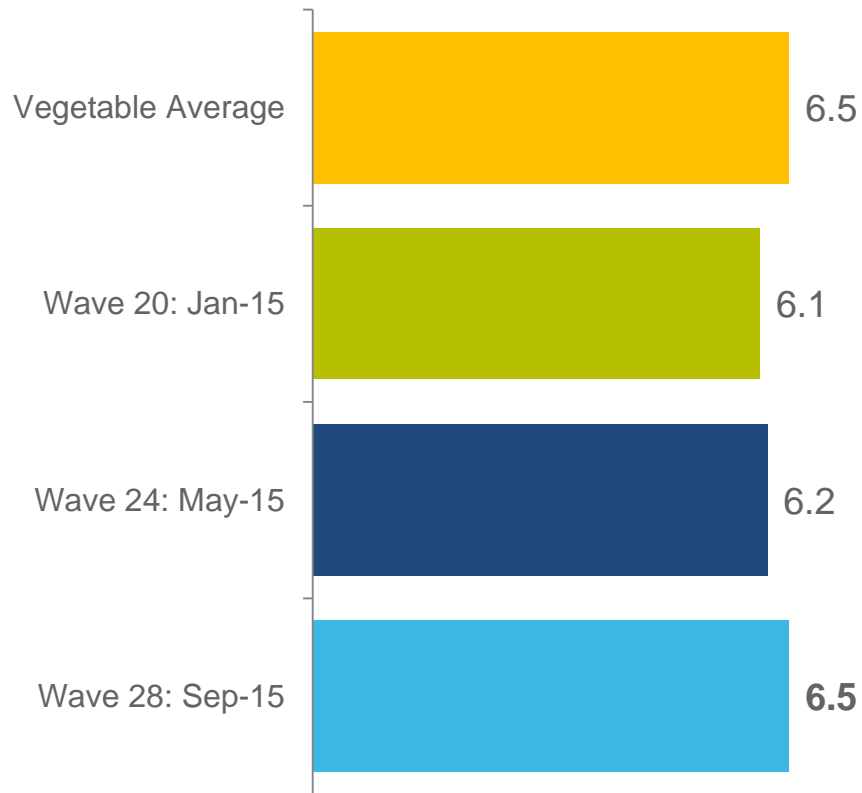


Top Cooking Styles

	Wave 20	Wave 24	Wave 28
Roasting	62%	56%	70%
Mashing	46%	49%	50%
Baking	47%	43%	43%
Boiling	41%	33%	33%
Steaming	29%	25%	26%
Soup	26%	26%	26%
Frying	11%	8%	17%
Slow Cooking	15%	13%	16%
Microwave	17%	12%	15%
Stir frying	8%	7%	11%



Importance of sweetpotato provenance has increased slightly and is now sitting above the Vegetable Average.



Q14. When purchasing <commodity>, how important is Provenance to you?
Mean scores out of 10.
Sample Wave 20, N=353, Wave 24, N=307, Wave 28, N=206



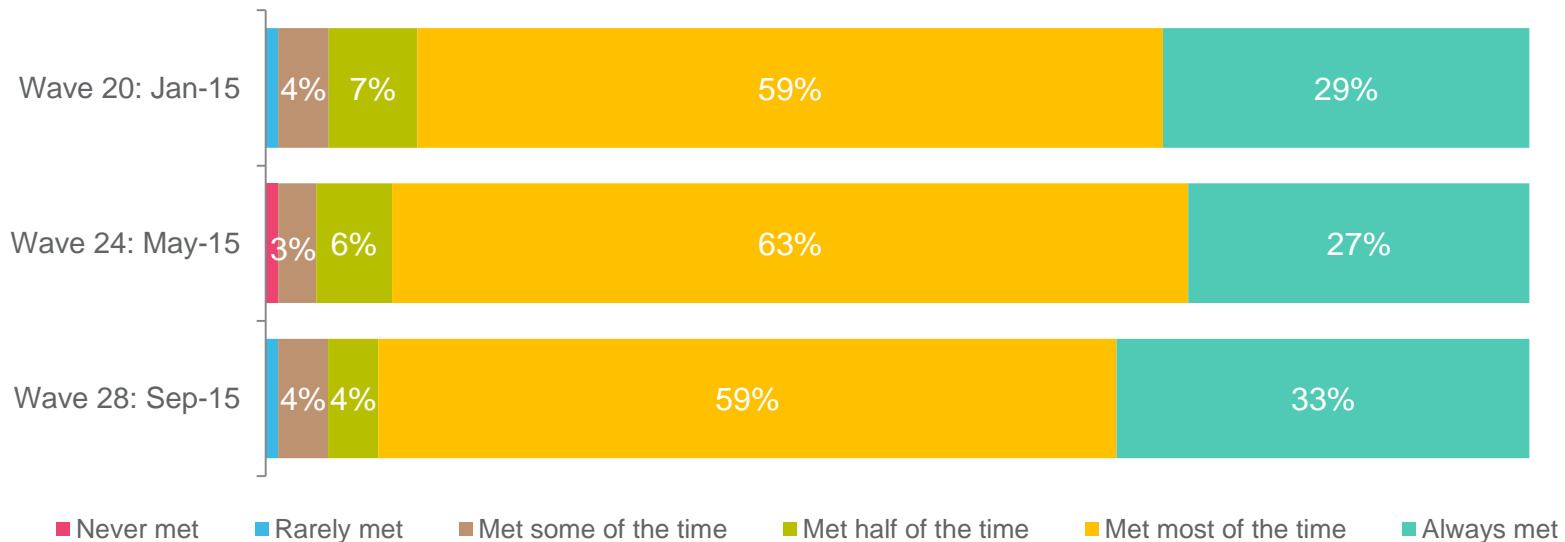
Freshness expectations have improved this wave and are being met at least most of the time.

Sweetpotatoes generally have a shelf life of nearly two weeks, comparably higher than other vegetables tracked.

Expected to stay fresh for **13.1 days**

▼ 12.3 days, Wave 20
▲ 13.9 days, Wave 24

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 20, N=353, Wave 24, N=307, Wave 28, N=206



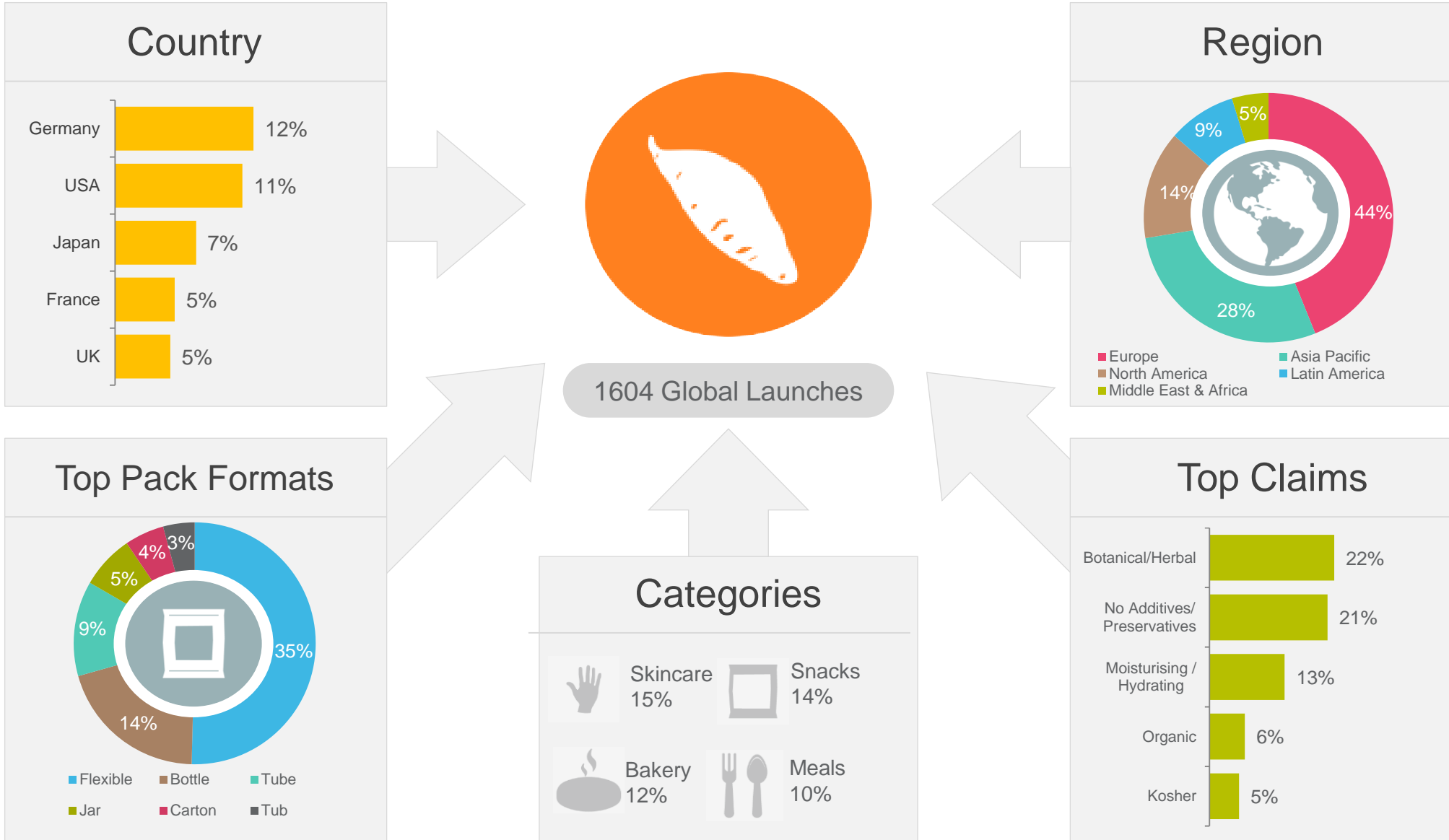
Trends: Sweetpotatoes.



Sweetpotato Global NPDs

July - September 2015

There were 1604 global launches over the past three months that contained Sweet potato as an ingredient. These were predominantly launched in Europe and Asia Pacific, particularly in Germany and USA. Key categories for launches were skincare, snacks, and bakery items.





Sweetpotato Product Launches: L3M (July - September 2015) Summary

- There were 1604 Sweetpotato products launched globally over the last three months.
- There were 47 products launched in Australia. Products include snacks and dips.
- Products were predominantly launched in Europe (44%) and Asia Pacific (28%).
- The main category launches were skincare (15%), snacks (14%), and bakery items (12%).
- Common pack formats used were flexible packaging (35%), bottles (14%) and tubes (9%).
- Popular claims used on products were botanical/herbal (22%), no additives/preservatives (21%), and moisturising/hydrating (13%).
- The most innovative product launched was a Purple Sweetpotato Flavoured Kit Kat in Canada. Other examples can be found on the following pages.

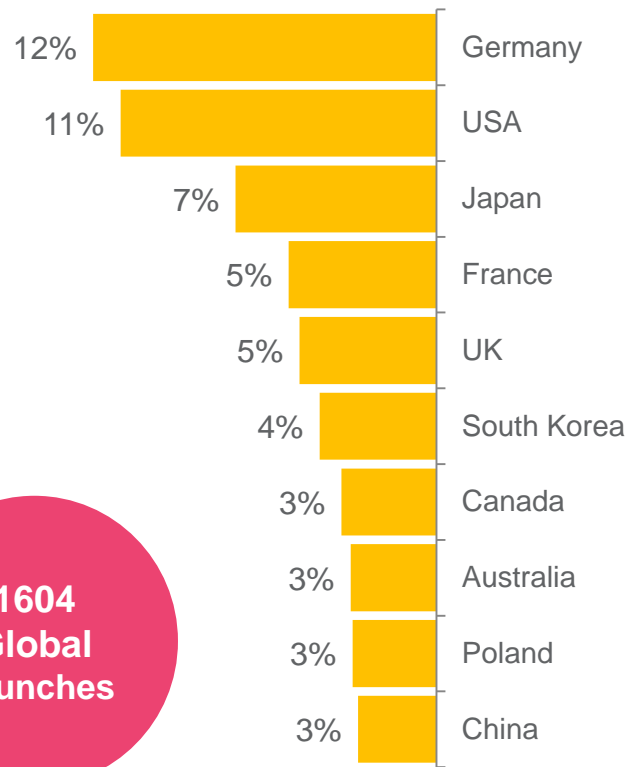


Source: Mintel (2015)



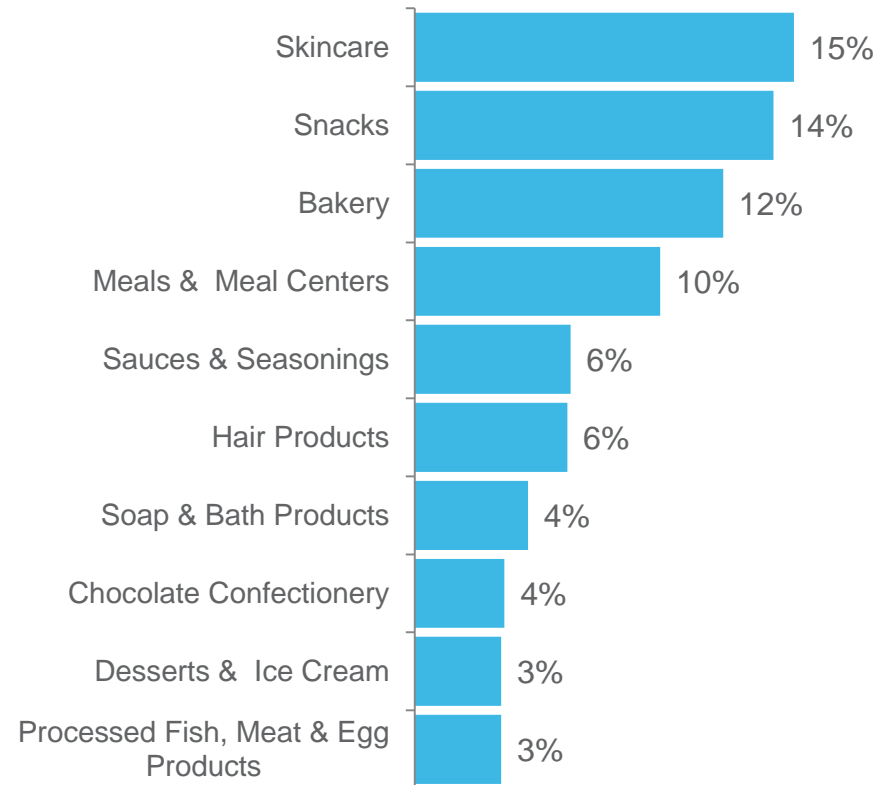
Germany and USA had the greatest number of sweetpotato product launches. The main categories for products were skincare and snacks.

Top Launch Countries



**1604
Global
Launches**










Top Launch Categories














Flexible packaging was the main format used, consistent across all regions. Botanical/herbal and no additives & preservatives were the most frequently used claims on products.

Pack Formats Used

Global		Flexible	35%
		Bottle	14%
		Tube	9%
Europe		Flexible	35%
		Bottle	13%
		Tube	9%
Asia Pacific		Flexible	38%
		Bottle	12%
		Tube	9%

Top Claims Used

Global		Botanical/Herbal	22%
		No Additives/Preservatives	21%
		Moisturising/Hydrating	13%
Europe		Botanical/Herbal	23%
		No Additives/Preservatives	22%
		Organic	14%
Asia Pacific		No Additives/Preservatives	24%
		Botanical/Herbal	18%
		Moisturising / Hydrating	14%

Only regions with n >30 are displayed

➤➤➤ Innovative Sweetpotato Launches: L3M (July - September 2015)

Golden Valley Organic Straight Cut Crispy Sweet Potato Fries (USA)

Golden Valley Organic Straight Cut Crispy Sweet Potato Fries are now available. According to the manufacturer, their unique steam blanching process enhances the full sweet flavors of an organic sweet potato. This USDA organic and kosher certified product is an excellent source of vitamin A. It retails in a 4-lb. pack.



Claims:
Organic, Kosher

Anbao Sweet Potato Crackers (Taiwan)

Anbao Sweet Potato Crackers are described as salty Taiwanese style sweet potato crackers made using fresh sweet potato to provide a natural flavour. This product is suitable for vegans and retails in a 220g easy to open pack.



Claims:
Convenient Packaging, Vegan, No Animal Ingredients

He Ji Seaweed Flavoured Sweet Potato Chips (Taiwan)

He Ji Seaweed Flavoured Sweet Potato Chips are processed according to a traditional process and said to have a light sweet taste. The product is free from artificial sweetener and preservatives, and retails in a resealable 170g pack.



Claims:
No Additives/Preservatives, Convenient Packaging

Fujipan Snack Sand Naruto Kintoki Sweet Potato Sandwich (Japan)

Fujipan Snack Sand Naruto Kintoki Sweet Potato Sandwich is said to have an exquisite harmony of naruto kintoki sweet potato and gently sweet brown sugar. The product retails in a pack containing two units. Launched on September 1, 2015, open-priced.



Claims:
N/A

➤➤➤ Innovative Sweetpotato Launches: L3M (July - September 2015)

SSG Food Market Sweet Potato Chips (South Korea)

SSG Food Market Sweet Potato Chips comprise 98% sweet potato. Five times oven baked with no oil, the product retails in a 40g pack.



Claims:
N/A

Domremy Gochisou Autumn Desserts Sweet Potato & Pumpkin Parfait (Japan)

Domremy Gochisou Autumn Desserts Sweet Potato & Pumpkin Parfait features caramel pudding, chestnut mousse, pumpkin cream and homemade sweet potato. Launched on September 1, 2015. RRP unavailable.



Claims:
Seasonal

Nestlé Kit Kat Purple Sweet Potato Flavour Chocolate Bar (Canada)

Nestlé Kit Kat Purple Sweet Potato Flavour Chocolate Bar is now available in a limited edition. The product retails in a 139.2g pack containing 12 x 11.6g units.



Claims:
Limited Edition

Yamazaki Donuts Station Sweet Potato Doughnut (Japan)

Yamazaki Donuts Station Sweet Potato Doughnut is available for Autumn 2015. It is filled with starchy sweet potato paste. The product retails in a single unit pack. Launched on September 1, 2015. RRP not available.



Claims:
Seasonal

➤➤➤ Innovative Sweetpotato Launches: L3M (July- September 2015)

Freshmark Ready to Braai Sweet Potato Parcels with Spiced Butter (South Africa)

Freshmark Ready to Braai Sweet Potato Parcels with Spiced Butter are now available. The product retails in a pack containing four units.



Claims:
Ease of Use

Scrubbys Sweet 'n' Beet Sweet Potato & Beetroot Crisps with Sea Salt (UK)

Scrubbys Sweet 'n' Beet Sweet Potato & Beetroot Crisps with Sea Salt are described as a superfood mix that is high in fibre, and free from gluten, artificial colours, flavours, preservatives, additives, GM, and MSG. The vegan product is lower in fat, made from vegetables with their skins on to retain more of the nutrients, nature's natural goodness and fibre, and to offer whole hearted taste and flavour.



Claims:
N/A

Bourbon Shittori Soft Cookie Sweet Potato Cookies (Japan)

Bourbon Shittori Soft Cookie Sweet Potato Cookies have been relaunched. The product, made with sweet potato paste and featuring a soft and moist texture, retails in a 210g pack with individually-wrapped units. Launched on August 11, 2015 with an RRP of 378 yen.



Claims:
N/A

Tohato Caramel Corn Sweet Potato Flavour Caramel Corn Snack (Japan)

Tohato Caramel Corn Sweet Potato Flavour Caramel Corn Snack has been relaunched for Autumn 2015. It is made with GMO-free corn and has soft, crispy and melting texture. The product, featuring sweet potatoes and butter for delicious and appetising flavour, retails in a 70g pack. Launched on August 17, 2015, open-priced.



Claims:
Seasonal, GMO-Free



Australian Sweetpotato Launches: L3M (July - September 2015)

**Super Nature Super Foods
Homestyle Sweet Potato
Cottage Pie**



**Vege Chips Lightly Salted
Popped Sweet Potato
Crisps**



**Chris' Down 2 Earth Sweet
Potato & Harissa Hommus**



**Deli Originals Sweet Potato
and Cashew Dip**



**Yummia Cinnamon & Sweet
Potato Layered Yogurt**



**Sempio Sweet Potato
Noodles**





In the Media.



General Vegetable News (July - September 2015)

- Harris Farm Markets is targeting food waste in a new campaign promoting their new “Imperfect Picks” range. Since September 2014, Harris Farm Markets has “rescued” and sold two million kilograms of fruit and vegetables.
- Statistics show that 25 per cent of fruits and vegetables grown in Australia do not make it to the shelves as they are not perfect looking.
- Co-CEO Tristan Harris says Harris Farm Markets never compromise on their commitment to taste and freshness, even though they have relaxed some of its high aesthetic standards. The new range will be priced up to 50 per cent cheaper than the regular range.
- The campaign will include images of the produce that will be featured as part of a new recipe collection by Chef Alex Kearns of Glebe Point Diner, and a PR campaign featuring chef Neil Perry and Mike McInerney.





Commodity News

(July - September 2015)



- Data has revealed that Australians are purchasing more Asian greens during their grocery shop compared to last year. Asian vegetable varieties including bok choy, choy sum and wombok, posted a 14 per cent growth in value and 12 per cent volume growth.
- The value of Asian vegetables against other vegetable commodities have risen despite the overall number of households purchasing them dropped slightly.

www.lifehacker.com.au



- Six months on from Cyclone Olwyn, growers in Western Australia's Gascoyne region are still cleaning up and feeling the storm's effects.
- The nets that are used to protect capsicum seedlings from dust and the elements were damaged, which has made a huge difference to output this season. Vegetable size, volume and plant height have all been affected.

www.abc.net.au



- 'Flower Sprouts', better known in Australia as 'Kalettes', are a hybrid between kale and brussels sprouts that are about to hit European supermarkets.
- Already in Australian supermarkets, the new vegetable looks like a tiny cabbage with green frilly leaves and streaks of purple. It was created from the desire to produce a brussels sprout with a more subtle flavour.

www.farminguk.com



- Health experts have warned against eating pre-washed spinach as they claim that commercial washing techniques fail to remove 90% of the bacteria.
- Small peaks and valleys in baby spinach leaves could be a key reason why there have been a number of bacterial outbreaks involving the vegetable.

www.dailymail.co.uk

Commodity News

(July - September 2015)



- A root vegetable specialist in the UK have welcomed the world's first fully automated trimming line.
- Developed in partnership with Dutch engineering firm, Feltracon, the machinery offers a series of benefits including increased output capacity and an improved cut of parsnip to enhance in-store presentation.
- The automated trimming line is designed to increase productivity and reduce labour costs.

www.freshplaza.com



- Supermarket giant Asda has recalled jars of pickled beetroot over fears they could be contaminated with a bacteria which can cause a rare but life-threatening infection.
- A batch of 'Asda Chosen By You Pickled Crinkle Cut Beetroot' might contain *Clostridium botulinum*, a bacteria that produces some of the world's deadliest naturally occurring toxins. The toxins can cause a serious form of food poisoning.

www.dailymail.co.uk



- Corbin California Estate has created the world's first sweetpotato vodka.
- The vodka requires more than 10 pounds of sweetpotatoes and the assistance of around "100 hands" to produce each bottle.
- It is described as having a "creamy mouthfeel and medium body, with nutty caramel undertones" and "a hint of sweetness on its smooth finish".

www.thespiritsbusiness.com



Project Harvest Background & Methodology.



Background & Setting the Scene.

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

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

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

This wave's report (Wave 28, September 2015) focuses on:

- ⇒ Asian Vegetables
- ⇒ Capsicum
- ⇒ Brussels Sprouts
- ⇒ Spinach
- ⇒ Parsnip
- ⇒ Beetroot
- ⇒ Sweetpotatoes

This is the first wave of tracking for kale and leek. This current report will highlight any observations in regards to these specific commodities.

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





Online Methodology.

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

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 (Asian Vegetables, Capsicum, Brussels Sprouts, Spinach, Parsnip, Beetroot and Sweetpotatoes) within the last month
- ⇒ Were the main or joint grocery buyer.

	Asian Vegetables n=310	Capsicum n=319	Brussels Sprouts n=268	Spinach n=308	Parsnip n=206	Beetroot n=206	Sweetpotatoes n=206
Gender							
Male	35%	36%	40%	30%	42%	48%	49%
Female	65%	64%	60%	70%	58%	52%	51%
Age							
18-24 y.o.	7%	6%	4%	8%	0%	2%	0%
25-34 y.o.	19%	23%	12%	28%	7%	16%	13%
35-44 y.o.	21%	16%	16%	17%	9%	15%	13%
45-54 y.o.	18%	20%	18%	19%	13%	19%	19%
55-64 y.o.	20%	18%	21%	17%	32%	30%	33%
65+ y.o.	15%	18%	29%	11%	39%	19%	22%
Household							
Single Income no Kids	15%	19%	16%	15%	17%	21%	18%
Double Income no Kids	23%	19%	18%	23%	17%	19%	16%
Young Families	18%	17%	15%	19%	5%	13%	11%
Established Families	20%	18%	19%	23%	17%	20%	21%
Empty Nesters	24%	26%	32%	20%	43%	27%	34%
Location							
New South Wales	20%	18%	22%	18%	14%	16%	16%
Victoria	20%	18%	19%	16%	16%	14%	14%
South Australia	13%	22%	19%	19%	17%	18%	19%
Queensland	17%	16%	17%	16%	11%	17%	12%
Western Australia	21%	17%	13%	22%	14%	20%	21%
Tasmania	5%	6%	6%	3%	25%	10%	13%
Australian Capital Territory	5%	3%	4%	5%	2%	4%	3%
Northern Territory	0%	1%	0%	1%	1%	1%	1%



Trends Research: Our Approach

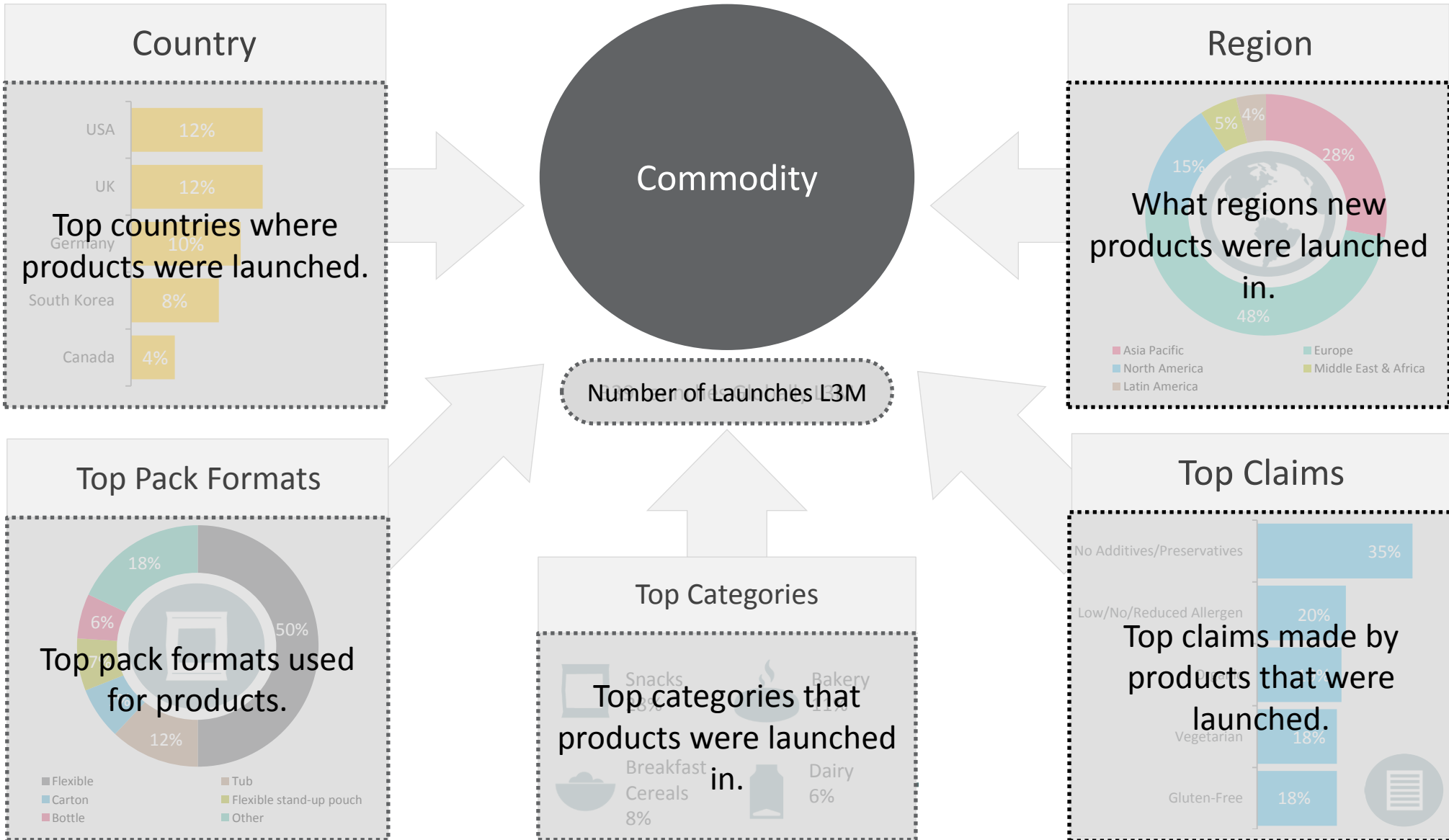


- ▶ Colmar Brunton has used a combination of both desk research and in the field market research to explore the trends for each vegetable commodity being tracked this month.
- ▶ Our main source of secondary data for this report was collected from Mintel Global New Products Database (GNPD).
- ▶ This data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

