Project Harvest Monthly Tracker Report.

Wave 30, November 2015

Vegetables tracked: Broccoli, Chillies, Corn, Green Peas, Kale, Leeks, Lettuce

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

Contents.

Wave 30:
Executive Summary

Industry Insight.

In January 2014, Wave 8 of the Project Harvest Vegetable Consumption Tracker found that children consumed, on average, 2.4 serves of vegetables per day – fewer than the Australian Guide to Healthy Eating recommendation of 2.5 to 5.5 serves. This illustrates why there is such a concern around unhealthy diets and why this is a current focus for HIA, as well as for other national institutions.

In October 2015, the Royal Children's Hospital surveyed a nationally representative sample of 1993 adults for their "Top Ten Child Health Problems" report. The results reveal that an Unhealthy Diet was ranked in the top four concerns, coming in after Excessive Screen Time, Obesity and a Lack of Physical Activity. These issues were more commonly rated as "big problems" facing all children compared to other concerns, such as Bullying, Illegal Drug Use, Violence, Internet Safety or Sun Safety.

A positive correlation was observed between children's age and parents' concerns about their unhealthy diets, aligning with findings of the Australian Health Survey (2011-13) that revealed those aged between two and three were more likely to meet the recommended usual intake of vegetables (49%) compared to children aged 4-18 (less than 10%). Interestingly, Unhealthy Diets were considered much more of a problem for all children (58%) than for respondents' own children (11%). This in itself shows the challenge around effectively changing behaviour: parents believe there are real problems, but not in their own homes.

Industry Insight continued.

To help address these concerns about unhealthy diets in children, HIA commissioned research into strategic initiatives to increase their vegetable consumption through project VG13090 *A strategy to address consumption of vegetables in children*. This has resulted in four priority areas of future focus: collaboration between those in and outside the horticulture industry; initiatives to engage children; continued research into new initiatives; and policy changes. These should be pursued whilst acknowledging the difficulty parents have with recognising their role in the problem, as well as working with what parents told us in Wave 8 of the current Vegetable Consumption Tracker: that the taste of particular vegetables has an impact on children's consumption habits.

This tracker told us that vegetables with bitter, sour, tart or aniseed-like flavour (such as witlof, chicory, artichoke and fennel) can inhibit consumption, suggesting that offering children vegetables with a blander or sweeter flavour profile may help in this most important quest!

Broccoli Grower Action Plan.

Wave 30 Fast Facts – Broccoli

- Consumer sentiment is in line with the Vegetable Average for all vegetables tracked thus far. There are high levels of endorsement for broccoli.
- On average broccoli is purchased 4 times per month and consumed 10 occasions per month. Mainstream retailers are the main purchase locations.
- Consumers typically purchase 800g of broccoli per occasion, relatively consistent with previous months. Broccoli is perceived to be good value for money, increasing this wave. Individual heads of broccoli are the preferred format.
- National pricing analysis revealed an average of $3.69 per kg, which is substantially lower than July, 2015 prices.
- Overall awareness of broccoli types remains low. Over half of consumers are unable to recall any variety.
- The key motivations for purchasing broccoli are health and convenience. The main barriers to purchase are that broccoli is not available in their area and that they don't want to waste any.
- Broccoli is expected to remain fresh for a week. Expectations of freshness are stable and in line with previous waves.

7.7 days

is the number of days broccoli is expected to remain fresh.

1.

Insight:

Health is an increasing trigger to broccoli purchase.

Short Term Recommendation:

Appeal to Conscious Improver consumers by clearly labelling the health benefits of broccoli at point of sale, including specific vitamin and nutrient benefits. This should encourage more frequent broccoli purchases.

2.

Insight:

There has been a lack of new product development globally, and only three product launches domestically in the last three months.

Long Term Recommendation:

Snacking is a growing category in Australia – look to the USA for innovative broccoli snacking products, including chips and poppers.

Chilli Grower Action Plan.

Wave 30 Fast Facts – Chilli

- Chillies hold strong importance to consumers and are likely to be recommended to family and friends. There is strong future purchase intent for chillies.
- Chillies are purchased 4 times a month and consumed on 10 occasions per month, which has declined this wave. Purchase is from mainstream and specialist retailers.
- Consumers generally purchase 300g of chillies, with recalled last spend consistent at $4.00. Overall, chillies are perceived as fair value for money.
- Pricing analysis revealed the average national price for long red chillies was $18.64 per kg, slightly higher than prices in July 2015.
- There is a high level of recall for chilli varieties. Jalapeno and birds eye have the greatest awareness amongst consumers.
- Main triggers for purchasing chillies are to use as an ingredient in dishes and taste. The key barriers to purchase are consuming enough for their needs and not wanting to waste any.
- Chillies are expected to remain fresh for just over 10 days, and this freshness is met most of the time.

$18.64 per kg was the average price for chillies in November, 2015

1. Insight:

There has been a decline in consumption of chillies in past waves. However, consumers are open to experimenting with chillies when cooking a new recipe.

Short Term Recommendation:

Inspire consumers with new recipe ideas that contain chilli at point of purchase. Clearly call out expected heat levels of dishes to avoid alienating less frequent users.

2. Insight:

A considerable number of consumers grow their own chillies. Additionally, purchase of chilli plants is on the rise.

Long Term Recommendation:

Further differentiate chilli varieties by creating cuisine-specific chillies, such as by encouraging consumers to use jalapenos for Mexican cooking and birds eye chillies for Thai. This will create the need for multiple varieties rather than a chilli plant for all cuisines.

Lettuce Grower Action Plan.

Wave 30 Fast Facts – Lettuce

- Lettuce holds high levels of importance and satisfaction with consumers. Future purchase intent has remained stable.
- Lettuce is purchased on average 4 times per month and consumed approximately 15 times per month. Purchase is primarily from mainstream retailers.
- On average, consumers are purchasing 700g of lettuce, which is consistent with the previous wave. Recalled last spend was $2.70. Value for money is perceived as fair.
- Price tracking revealed an average price of $2.22 per Iceberg lettuce head. This is lower than prices from July 2015.
- There is a high level of awareness of lettuce types, especially Iceberg and Cos.
- The main motivations for purchasing lettuce are health and complementing other food. Not wanting to waste any and short shelf life are the key barriers to purchase.
- Lettuce is expected to stay fresh for a week. Expectations of freshness are met most of the time, consistent with previous waves.

14.7 times

is the average number of consumption occasions for lettuce per month.

1.

Insight:

Knowing that lettuce is grown in Australia is highly important to consumers.

Short Term Recommendation:

Ensure that all lettuce varieties have Australian provenance called out in-store and on-pack. Where possible, communicate locally grown lettuce (i.e. state provenance).

2.

Insight:

Fear of wastage remains a key barrier to purchase. Lettuce also has the highest level of wastage of all vegetables tracked.

Long Term Recommendation:

Consumers want smaller portion sizes to help reduce their wastage. Ensure there are multiple sizes of pre-prepared lettuce formats that will appeal to couples, small families, and large families.

Sweet Corn Grower Action Plan.

Wave 30 Fast Facts – Sweet Corn

- Sweet corn holds high levels of satisfaction for consumers, and they are likely to recommend sweet corn to family and friends.
- Purchase frequency of sweet corn is around 4 times per month and on average sweet corn is consumed on 6 occasions per month.
- On average, consumers purchase 0.9kg of sweet corn, with recalled last spend $4.20. Perceived value for money is good (6.7/10), consistent with the previous wave.
- Analysis of pricing nationally revealed an average price of $1.42 per cob, which was slightly higher than in July 2015.
- Awareness of sweet corn remains very low, with two thirds of consumers unable to recall a type.
- Taste is the primary trigger to purchase. Ease of preparation is becoming a stronger influence on purchase across waves. Already consuming enough and wanting a variety of vegetables are the main barriers to purchase.
- Consumers expect sweet corn to remain fresh for approximately 8 days, and this longevity is likely to be met most of the time.

54% of consumers purchase sweet corn in pre-packaged small trays.

1.

Insight:

Weight and diet management has doubled as a barrier to purchasing sweet corn over the last three waves.

Short Term Recommendation:

To negate negative perceptions of sweet corn, include nutritional panels or health star ratings and nutritional claims on pack (such as sweet corn cobs having less calories than an apple).

2.

Insight:

Grilling corn is continuing to grow in popularity.

Long Term Recommendation:

To increase awareness of grilling as a cooking style, provide cooking instructions on all packs (with husk and without). As we enter warmer months, consider adding corn to meat grill packs for family BBQs.

Green Peas Grower Action Plan.

Wave 30 Fast Facts – Green Peas

- Green peas hold high levels of importance and consumers are likely to recommend peas to family and friends. Future purchase intent looks stable.
- Green peas are purchased on average 5 times per month and consumed on 10 occasions per month. Purchase is primarily from mainstream retailers.
- On average, consumers are purchasing 700g of green peas, which is consistent with the previous wave. Recalled last spend was $4.20. Value for money is perceived as fair.
- Price tracking revealed an average price of $11.87 per kg of snow peas, which has continued to decline over the last three waves.
- Over half of consumers are unable to recall a type of green pea. Snow Peas and Snap Peas have the highest level of recall.
- The main motivations for purchasing green peas are taste and health. Already consuming enough and not wanting to waste any are the key barriers to purchase.
- Green peas are expected to stay fresh for 8 days. Expectations of freshness are met most of the time.

7.7 days

is the number of days green peas are expected to remain fresh.

1.

Insight:

Awareness of green pea varieties has fallen this month.

Short Term Recommendation:

Ensure pea varieties are clearly labelled at point of sale. Further differentiate types of green peas by communicating specific flavour profiles and suitability in cooking and cuisine styles.

2.

Insight:

Consumers are increasingly eating green peas raw.

Long Term Recommendation:

Investigate new product development opportunities that include raw green peas including pre-prepared salad mixes and slaws.

Kale Grower Action Plan.

Wave 30 Fast Facts – Kale

- There are high levels of interest in kale, with consumers likely to recommend it to family and friends. There is strong future purchase intent, with one third of consumers indicating they intend to increase the amount they currently purchase.
- On average, kale is purchased 4 times per month, and consumers 9 occasions per month.
- On average, consumers purchase 600g of kale. Value for money is perceived to be fair.
- Analysis of pricing nationally revealed an average price of $3.26 per bunch, which is slightly lower than in July 2015.
- Awareness of kale varieties has substantially improved, however 61% of consumers are still unable to recall a type.
- Health and nutrition are the primary triggers to purchase. Not wanting to waste any and consuming enough for their needs are the main barriers to purchase.
- Consumers expect kale to remain fresh for nearly a week, and this longevity is likely to be met most of the time.

39% of consumers use steaming as a method for cooking kale.

1.

Insight:

Kale has lower than average consumer satisfaction and declining value for money, but strong future purchase intent.

Short Term Recommendation:

Communicate the versatility of kale by promoting various meal occasions such as smoothies for breakfast, salads for lunch and chips for a snack. This should increase value for money and satisfaction perceptions.

2.

Insight:

Short shelf life has increased as a barrier to purchase this wave, while wastage remains the key barrier for kale purchase.

Long Term Recommendation:

As a newer vegetable in consumers' repertoire, there is a need for education on the optimal storage of kale. Coming into the warmer months, highlight freezing of kale as a storage option, which will also minimise wastage.

Leek Grower Action Plan.

Wave 30 Fast Facts – Leek

- Consumer sentiment for leeks are in line with the Vegetable Average.
- Leeks are purchased on average twice per month and consumed four times per month, slightly higher than the previous wave. Purchase is primarily from mainstream retailers.
- On average consumers are purchasing 800g of leek. Recalled last spend was $3.50, with value for money perceived to be fair.
- Price tracking revealed an average price of $2.27 per leek, relatively consistent with the previous wave.
- Awareness of leek types is very low, with 91% of consumers unable to recall a type.
- The main motivations for purchasing leeks are to use as an ingredient in dishes and that they taste great. Already consuming enough and not wanting to waste any are the key barriers to purchase.
- Leeks are expected to stay fresh for over a week. Expectations of freshness are met most of the time.

26% of consumers used leeks when cooking a new recipe.

1.

Insight:

Ease of preparation is a trigger to purchase. Quick meal occasions are increasing in popularity.

Short Term Recommendation:

Appeal to time-poor consumers by highlighting its convenience, ease of cooking and versatility for quick meals, such as frittatas, quiches, omelettes and soups.

2.

Insight:

There has been an increase in leeks used in Asian cuisine, in particular Chinese and Thai. Stir frying is also on the rise.

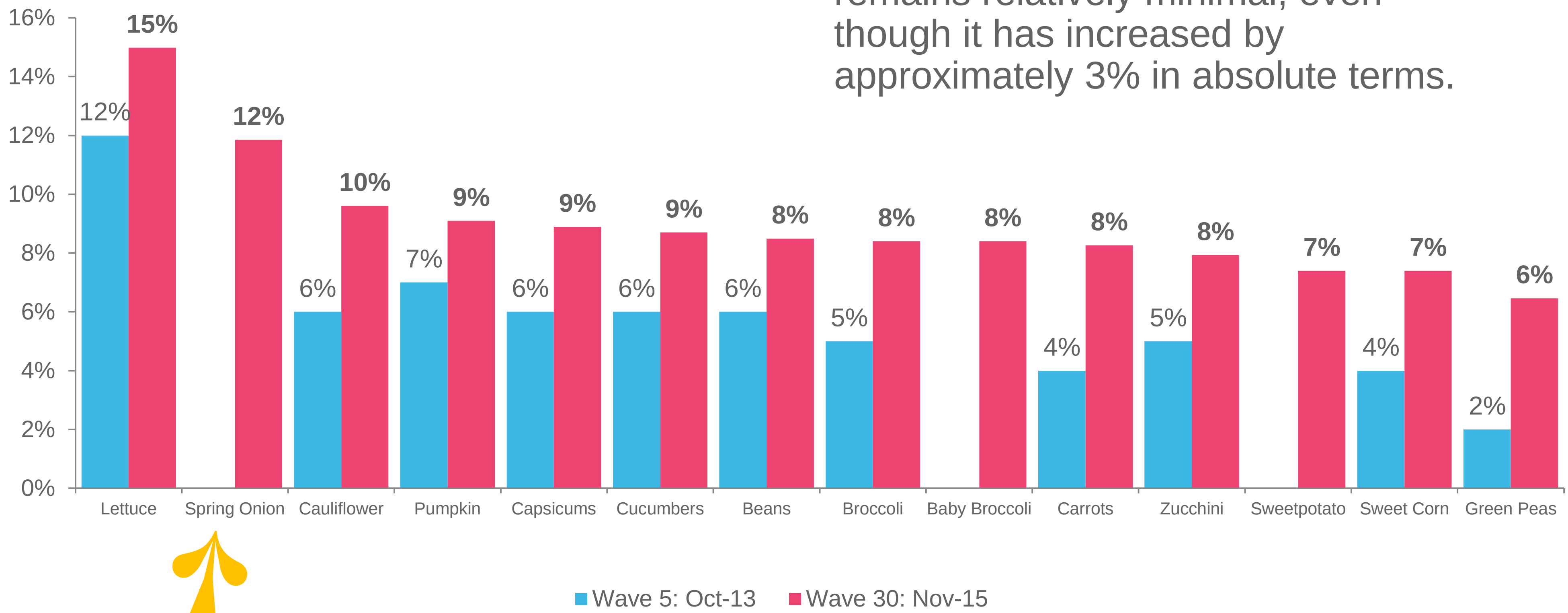
Long Term Recommendation:

Investigate new product development that includes leek in pre-prepared stir fry packs substituting out spring onions and shallots.

Wave 30:
Response to Ad hoc Questions

Vegetable Wastage.

Since 2013, there has been a directional increase in the amount of wastage of fresh vegetables. Overall, vegetable wastage still remains relatively minimal, even though it has increased by approximately 3% in absolute terms.



Lettuce, spring onion and cauliflower have the most wastage.

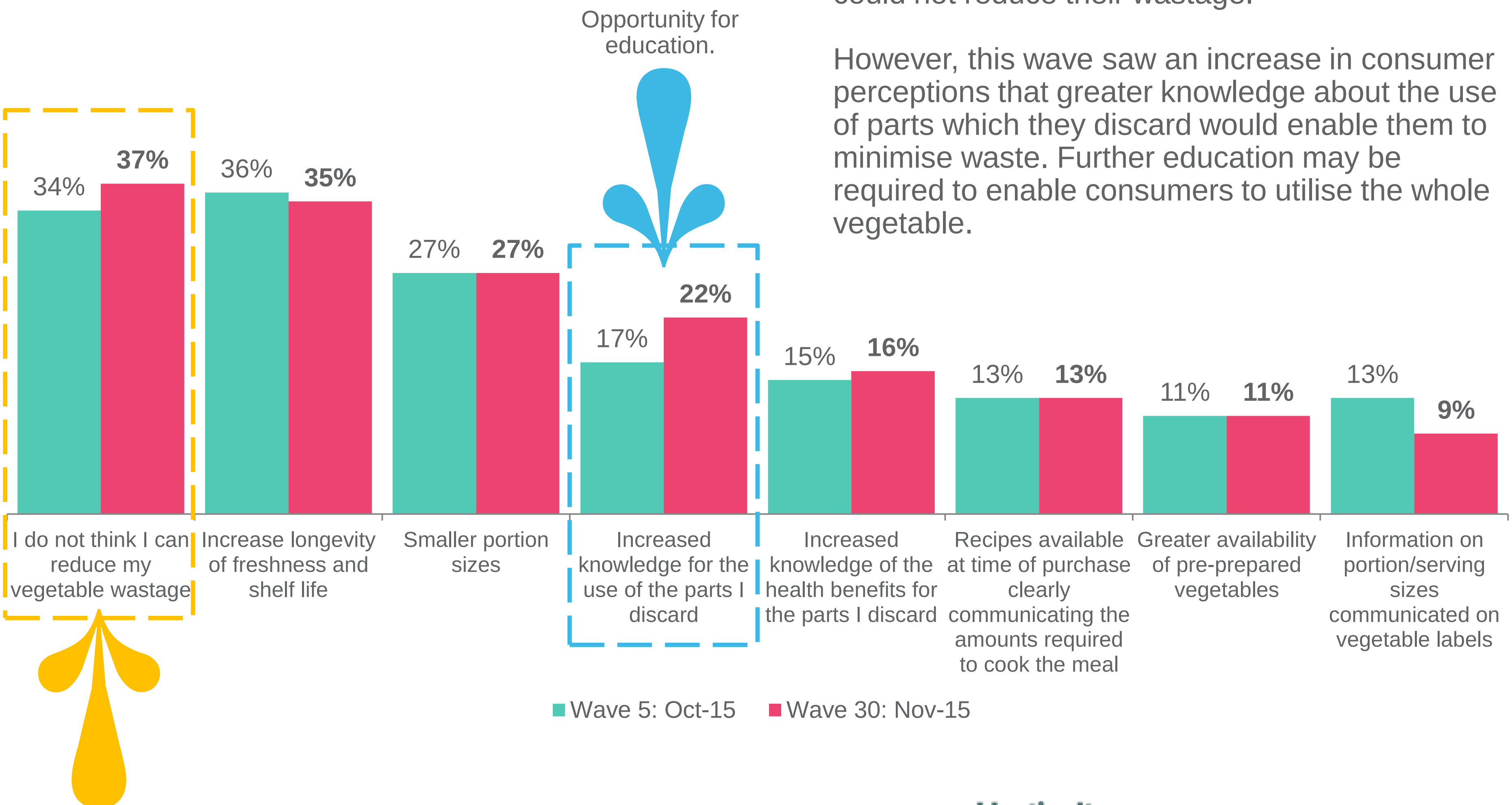
AHW30Q1. Of the vegetables below, what percentage of the amount that you purchase, do you typically not use?
Base: Wave 5 N=589, Wave 30 N=613

Reducing Wastage.

There has been little variation in strategies to reduce vegetable wastage since 2013.

Over one third of consumers still believe that they could not reduce their wastage.

However, this wave saw an increase in consumer perceptions that greater knowledge about the use of parts which they discard would enable them to minimise waste. Further education may be required to enable consumers to utilise the whole vegetable.



AHW30Q2. How could this wastage be reduced?
Base: Wave 5 N=589, Wave 30 N=613

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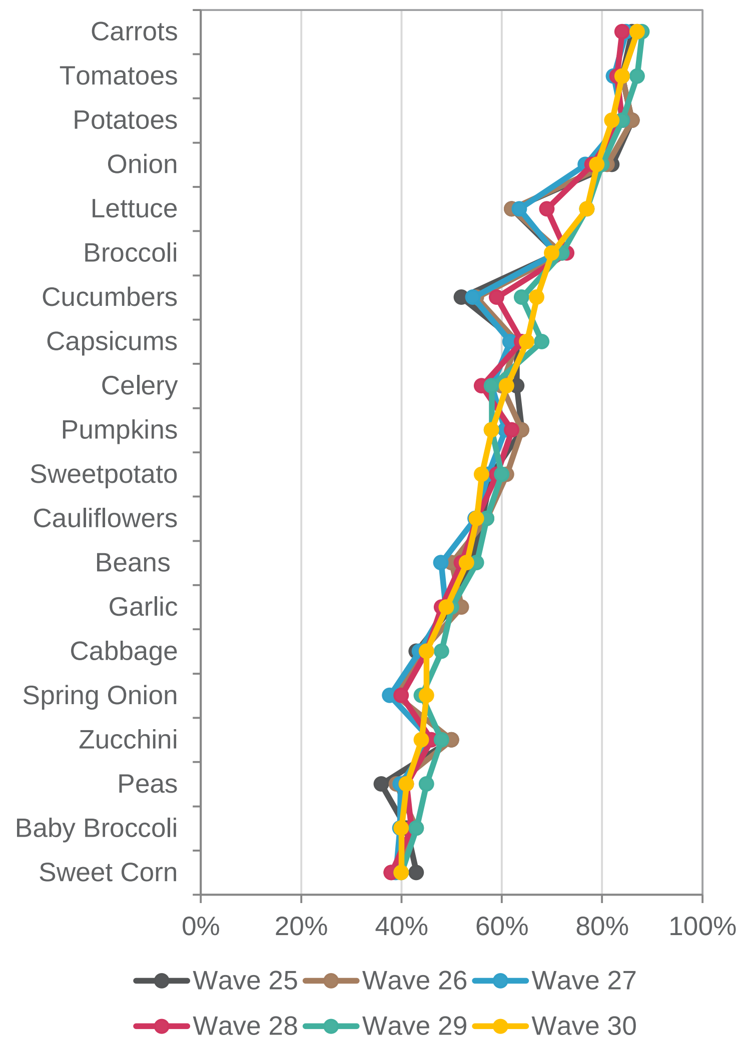
Wave 30: Overall Vegetable Tracking

Top 20 Vegetables Purchased Last Month

Carrots, tomatoes and potatoes continue to be the staple vegetables most popular with consumers.

Vegetable purchase in November is consistent with past waves. Whilst there has been little variation, purchase of cucumber and lettuce has increased over the past two waves in line with the warmer months.



Sample Wave 30 N=948 *(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.

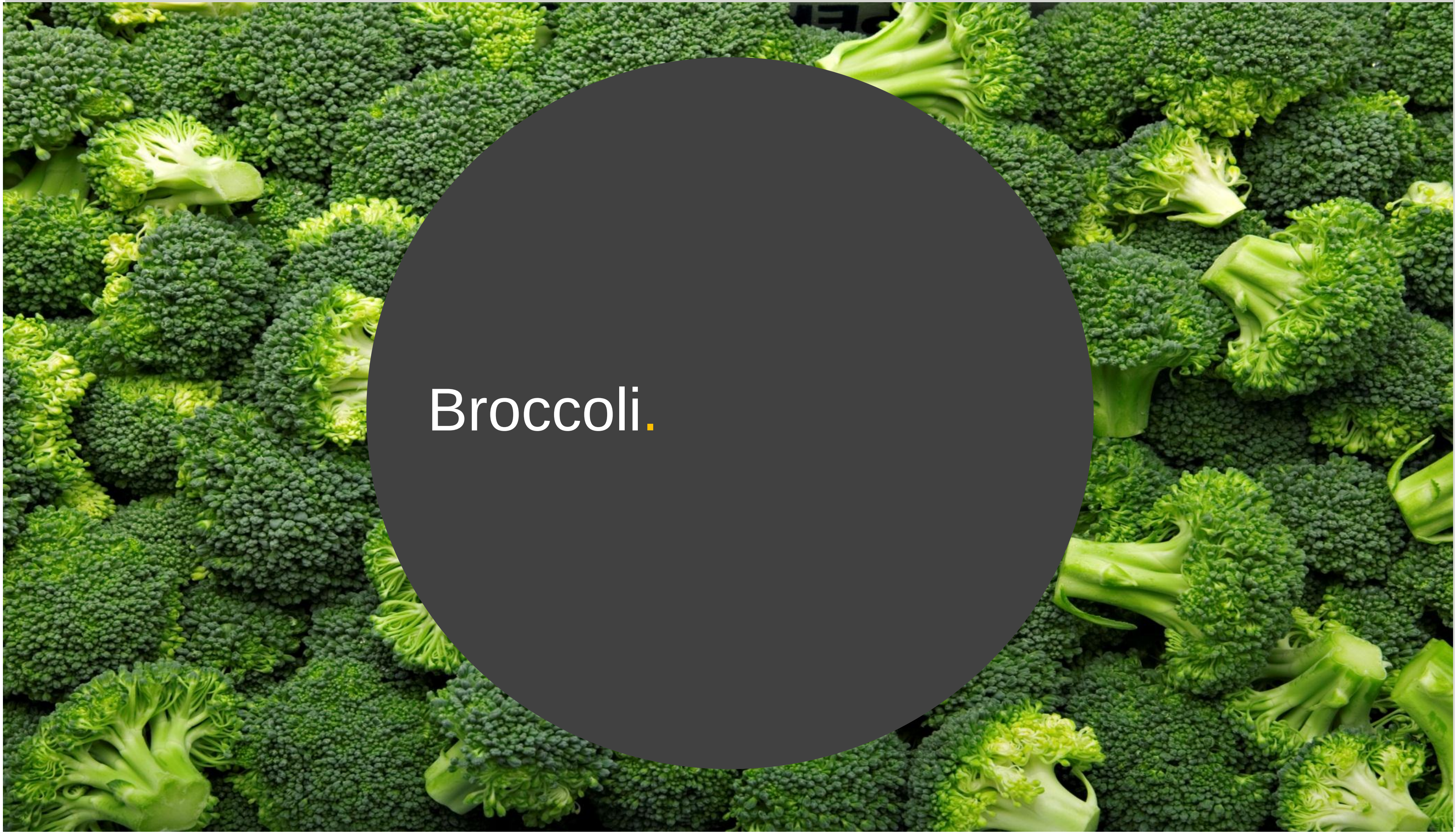
- How **important** to you is having a range of *commodity* available in the store where you usually shop?
- How **satisfied** or dissatisfied are you with the range of *commodity* currently available?
- How likely would you be to **recommend** *commodity* to your family and friends?
- How interested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

Category health and consumer sentiment remains strong, especially for endorsement and interest compared with the vegetable average.

Kale, green peas and chillies have strong future purchase intent, while other commodities appear stable.

	Broccoli	Chillies	Lettuce	Sweet Corn	Green Peas	Kale	Leek	Vegetable Average
Importance	6.4	7.2	7.0	6.5	7.3	6.5	6.3	6.4
Satisfaction	7.1	6.5	7.0	7.0	6.8	6.2	6.6	6.6
Endorsement	7.4	7.4	7.0	7.3	7.3	7.3	7.1	6.9
Interest (New Varieties)	6.3	7.3	6.4	6.5	6.8	6.7	6.5	6.3
Future Purchase								
More	13%	20%	17%	18%	21%	32%	10%	15%
Same	86%	80%	83%	80%	77%	65%	89%	83%
Less	1%	0%	0%	2%	2%	3%	1%	1%

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



Broccoli.

Both consumption and purchase frequency of broccoli have remained relatively stable this wave.

Purchase is typically from mainstream retailers, with Aldi becoming an increasingly popular purchase channel.

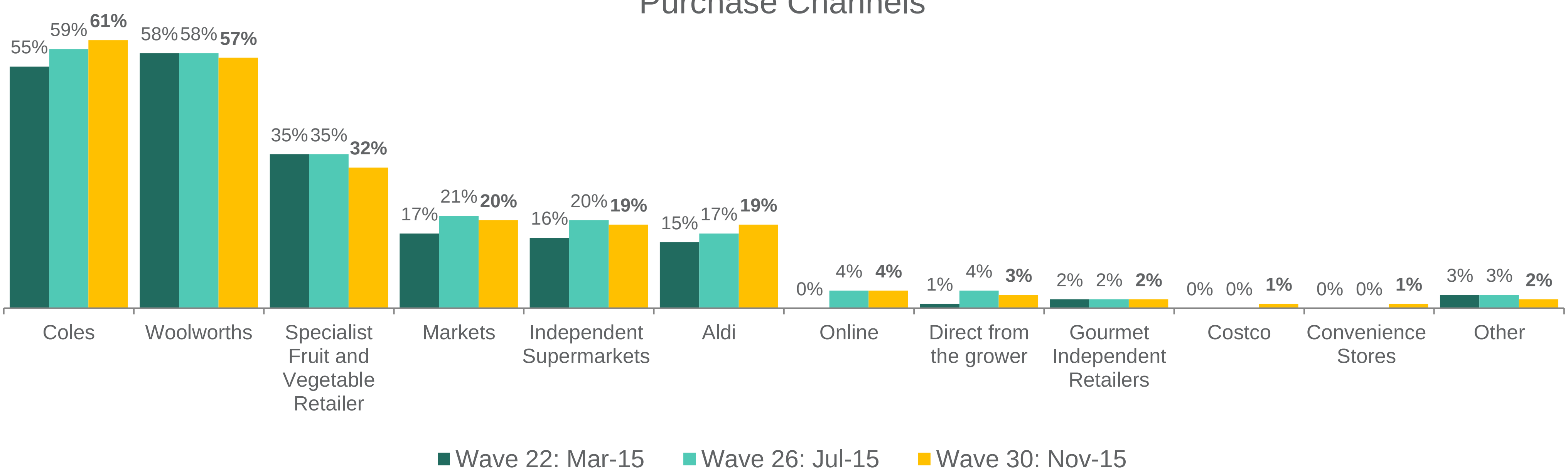
Average Purchase **4.1** times per month

▲ 4.2 times, Wave 22
▲ 4.5 times, Wave 26

Average Consumption **10.5** times per month

▼ 10.1 times, Wave 22
— 10.5 times, Wave 26

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 22 N=317, Wave 26 N=309, Wave 30 N=302

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

Average Spend and Price Sensitivity.

Average weight of purchase

The average consumer typically purchases **800g** of broccoli, which is consistent with the previous wave.

▼ 700g, Wave 22
— 800g, Wave 26

Recalled last spend

The average recalled last spend in November was **$3.40**, which has slightly declined over the last three waves.

▲ $3.60, Wave 22
▲ $3.50, Wave 26

Value for money

On average, consumers perceived broccoli to be good value for money **(6.4/10).** There has been an increase in value perceptions across waves.

▼ 6.1/10, Wave 22
▼ 6.2/10, Wave 26

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 22 N=317, Wave 26 N=309, Wave 30 N=302

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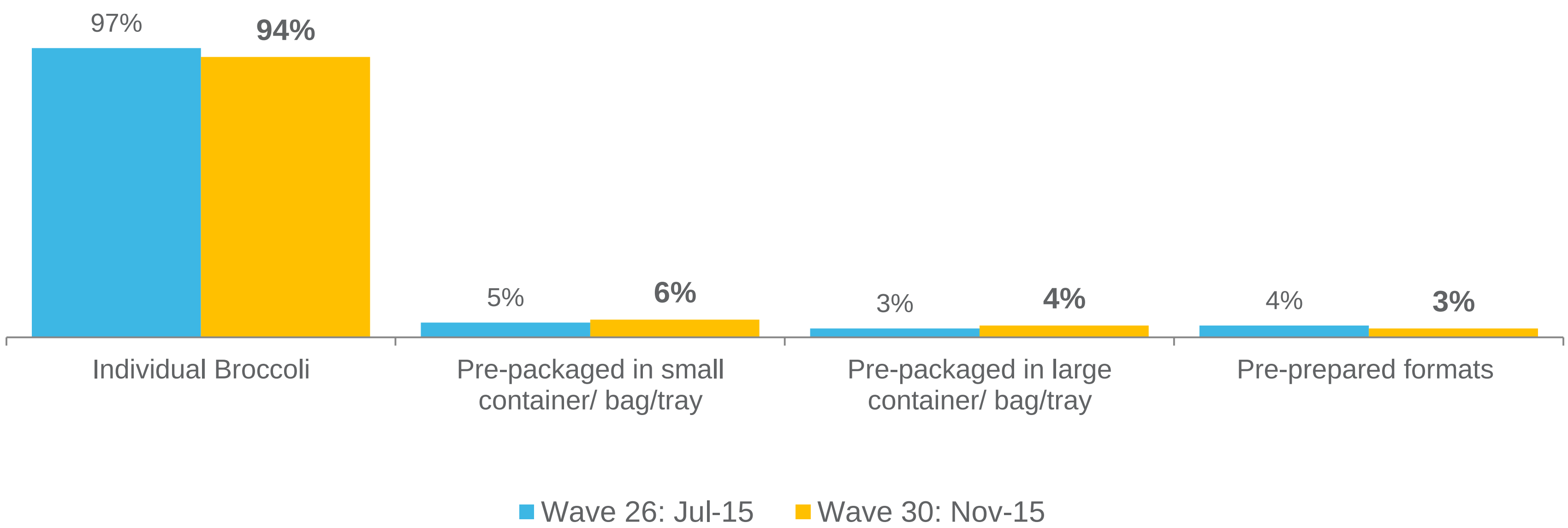
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

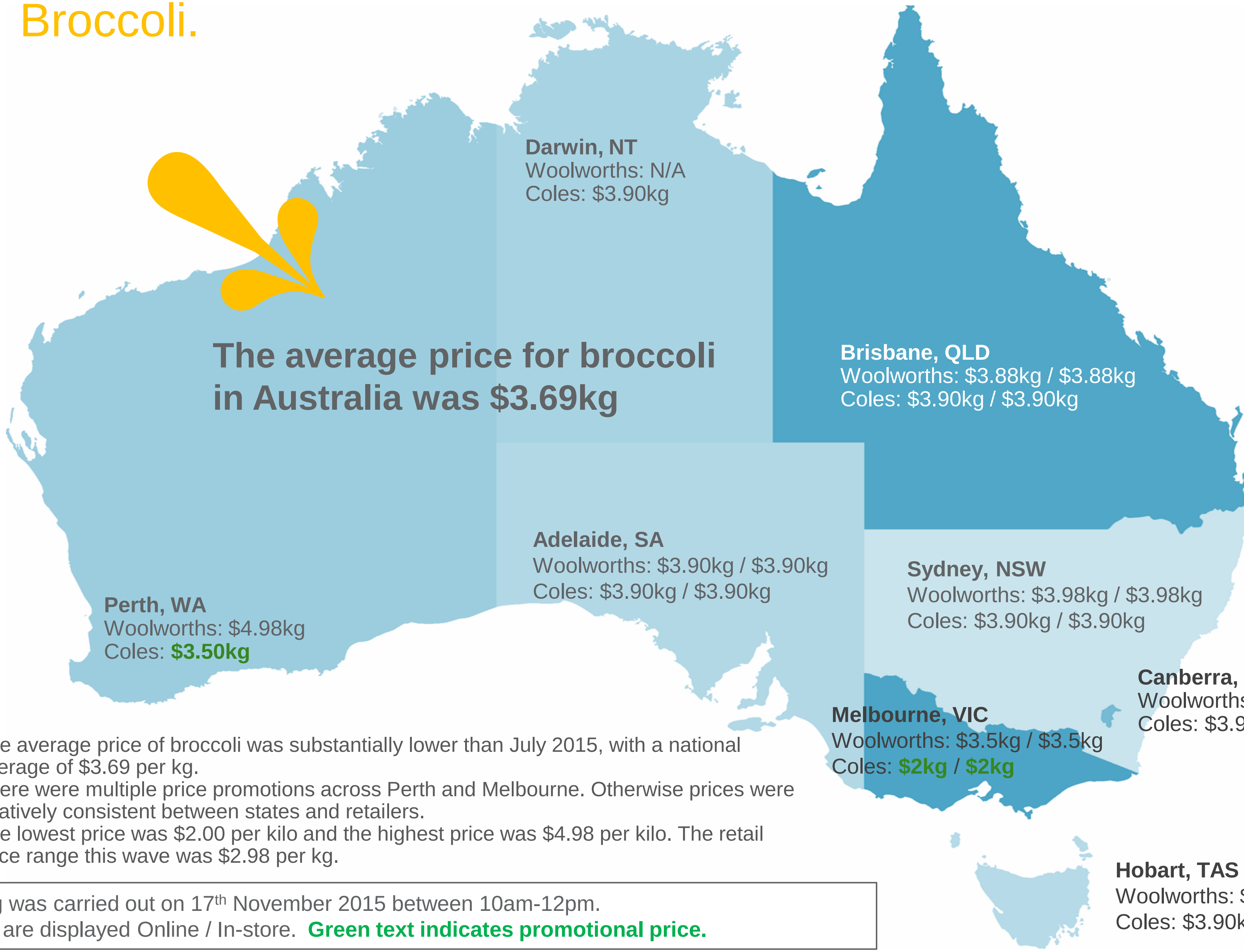
Individual broccoli heads are the main format purchased by consumers. Pre-packaged formats in small and large containers, bags and trays are also purchased options.



Q4b In what fresh formats do you typically purchase Broccoli?
Sample: Wave 22 N=317, Wave 26 N=309, Wave 30 N=302

Online and In-store Commodity Prices.

Broccoli.

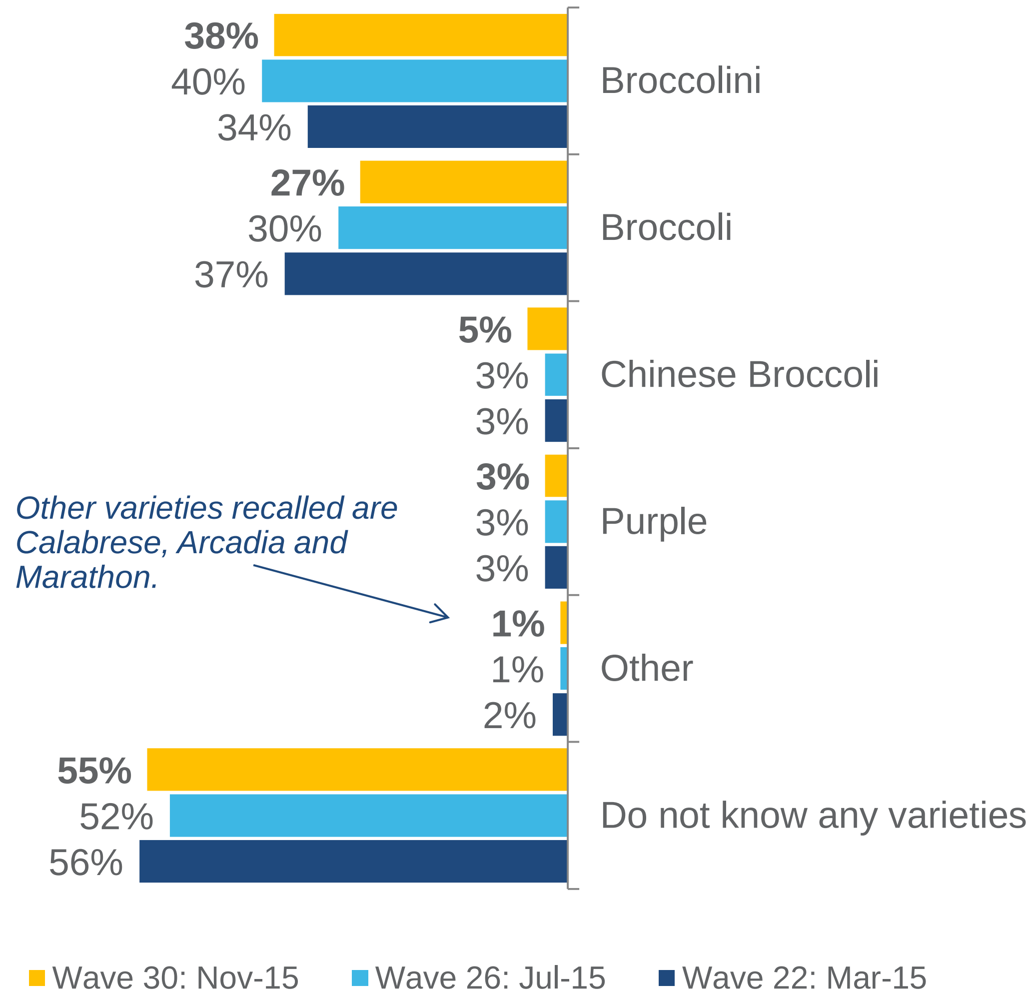


- The average price of broccoli was substantially lower than July 2015, with a national average of $3.69 per kg.
- There were multiple price promotions across Perth and Melbourne. Otherwise prices were relatively consistent between states and retailers.
- The lowest price was $2.00 per kilo and the highest price was $4.98 per kilo. The retail price range this wave was $2.98 per kg.

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

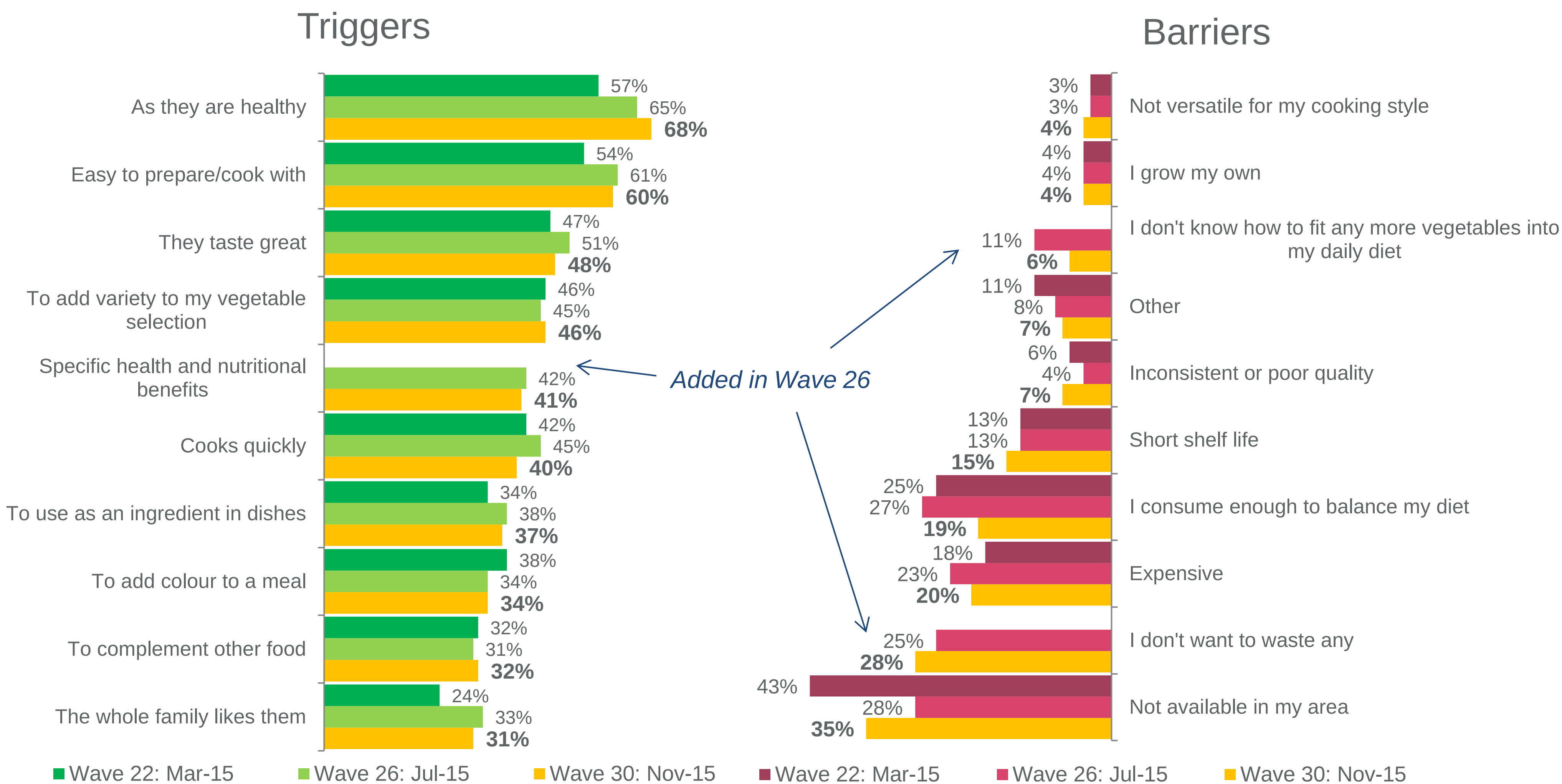
Overall awareness of broccoli types is relatively consistent across waves, with just over half of consumers unable to recall a type.

Consumers recall ‘Broccolini’ and generic names, such as ‘broccoli’, with very few consumers able to name specific types.



Q6a. What varieties of <commodity> are you aware of? (unprompted)
Sample: Wave 22 N=317, Wave 26 N=309, Wave 30 N=302

Health and convenience continue to be the main influences on broccoli purchase. The main barrier to purchase is broccoli not being available in their area.



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 22 N=317, Wave 26 N=309, Wave 30 N=302

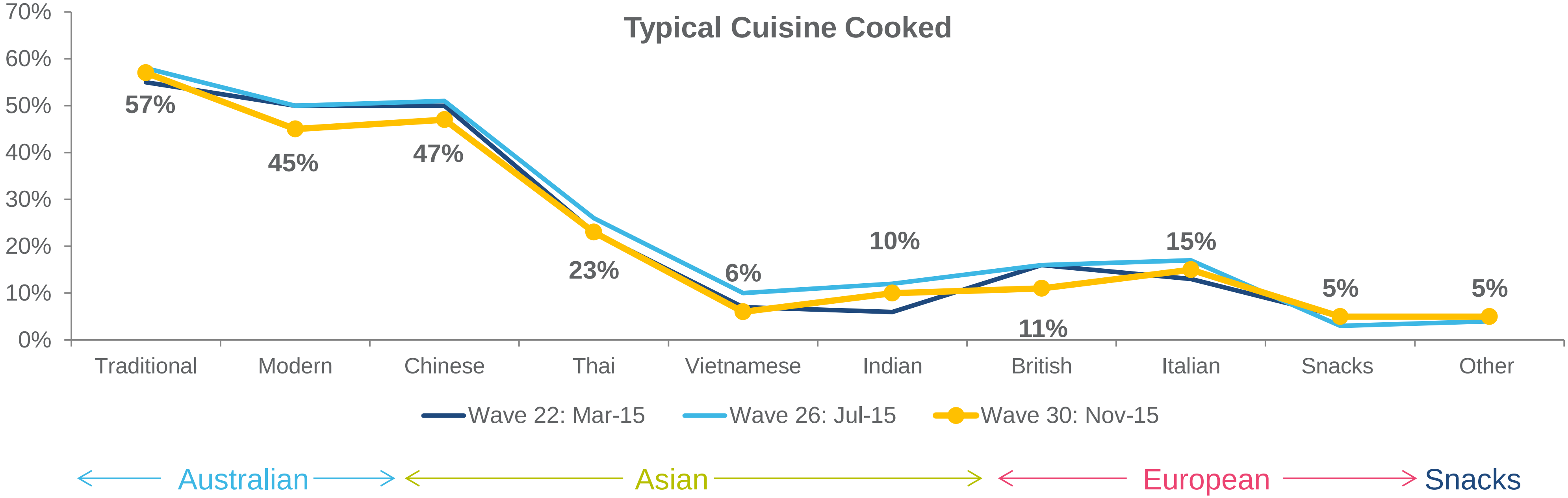
Dinner is the main meal occasion for broccoli consumption. Cuisines typically cooked remain relatively consistent this wave, with Australian and Chinese cuisines being most popular.

Top 5 Consumption Occasions

	Wave 26	Wave 30
Dinner	82%	**77%**
Family Meals	61%	**62%**
Weekday Meals	53%	**46%**
Quick Meals	37%	**39%**
Weekend Meals	42%	**39%**

13% used broccoli when cooking a new recipe

▼ 9%, Wave 22
▲ 14%, Wave 26



Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?
Sample: Wave 22 N=317, Wave 26 N=309, Wave 30 N=302

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

Broccoli is generally steamed and stir-fried. Carrots, potatoes and cauliflower are most likely to be served in combination with broccoli, consistent with the previous wave.

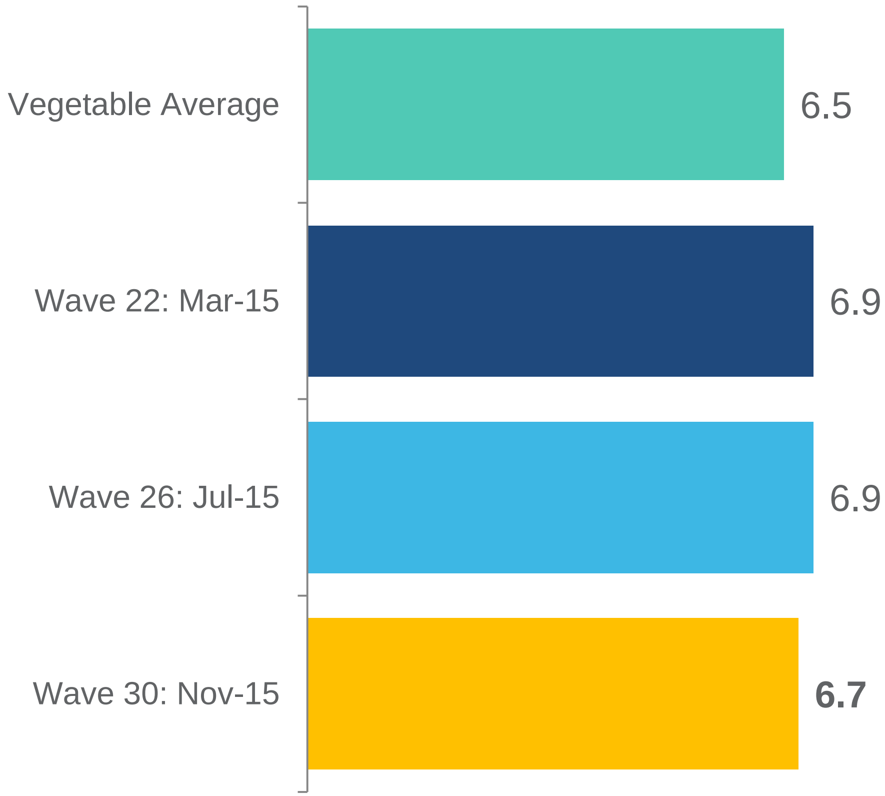
Accompanying Vegetables

Carrot	65%
Potato	57%
Cauliflower	40%
Sweet Potato	35%
Pumpkin	30%

Top 10 Cooking Styles			
	Wave 22	Wave 26	**Wave 30**
Steaming	62%	66%	**68%**
Stir frying	49%	57%	**47%**
Boiling	36%	39%	**36%**
Microwave	28%	26%	**26%**
Soup	12%	16%	**13%**
Raw	9%	12%	**10%**
Sautéing	6%	11%	**10%**
Frying	0%	8%	**9%**
Slow Cooking	9%	10%	**7%**
Roasting	4%	8%	**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 22 N=317, Wave 26 N=309, Wave 30 N=302

Importance of provenance has slightly declined this wave. However, knowing that broccoli is grown in Australia still remains highly important information for consumers.



7.9

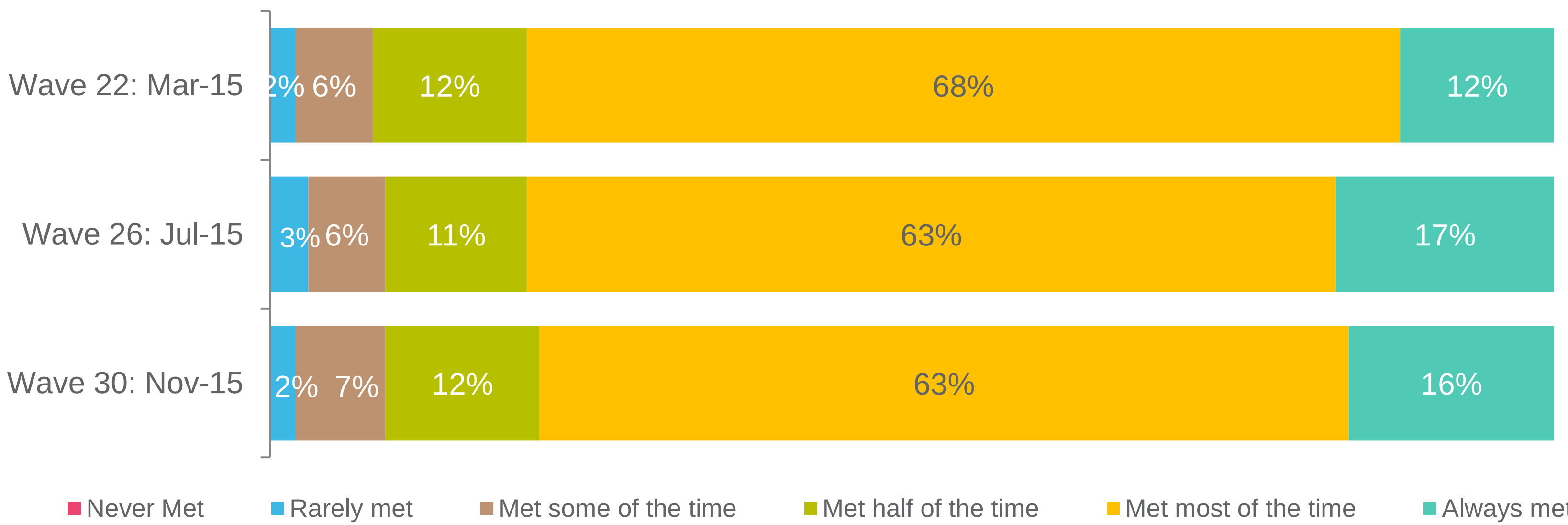
Q14. When purchasing <commodity>, how important is Provenance to you?
Q15. And when purchasing Chillies, how important is that it is grown in Australia?
Sample: Wave 22 N=317, Wave 26 N=309, Wave 30 N=302

Broccoli is expected to stay fresh for just over a week, slightly above previous waves. Expectations of freshness are being met most of the time.

Expected to stay fresh for **7.7** days

▼ 7.2 days, Wave 22
▼ 7.4 days, Wave 26

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 22 N=317, Wave 26 N=309, Wave 30 N=302

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▼: Indicates LOWER score than current wave.
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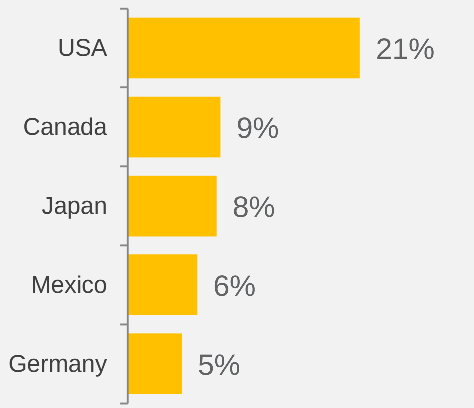
Broccoli Product Launch Trends.

Broccoli Global Launches

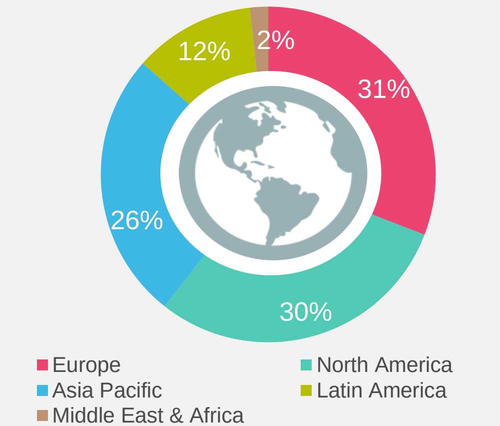
September – November 2015

There were 282 new broccoli products launched globally over the last 3 months. Top categories for launch were meals and fruit and vegetables. These launches occurred primarily across Europe and North America.

Country

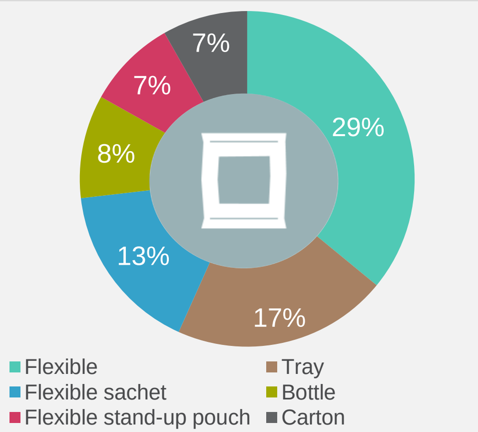


Region



282 Global NPDs

Top Pack Formats



Categories

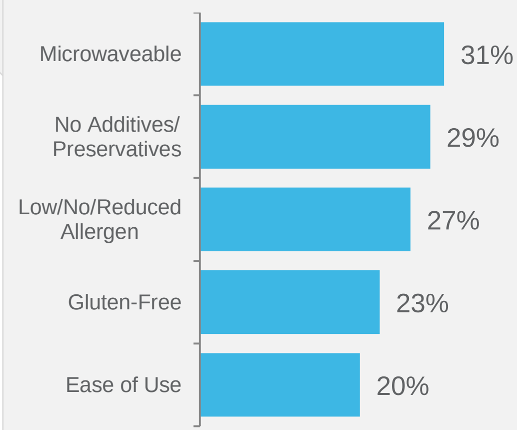
Meals 29%

Fruits & Vegetables 14%

Snacks 11%

Skincare 9%

Top Claims

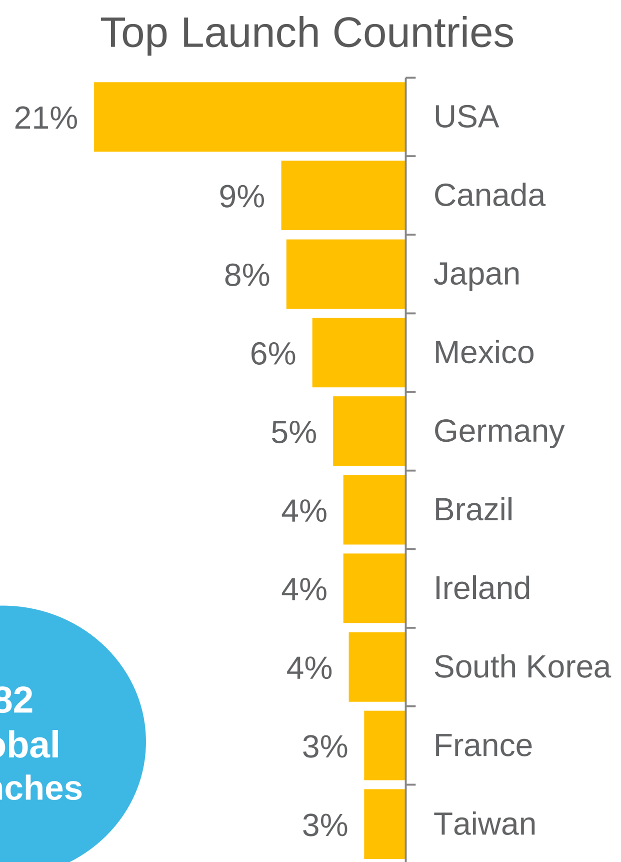


Broccoli Product Launches:
Last 3 Months (September – November 2015)
Summary

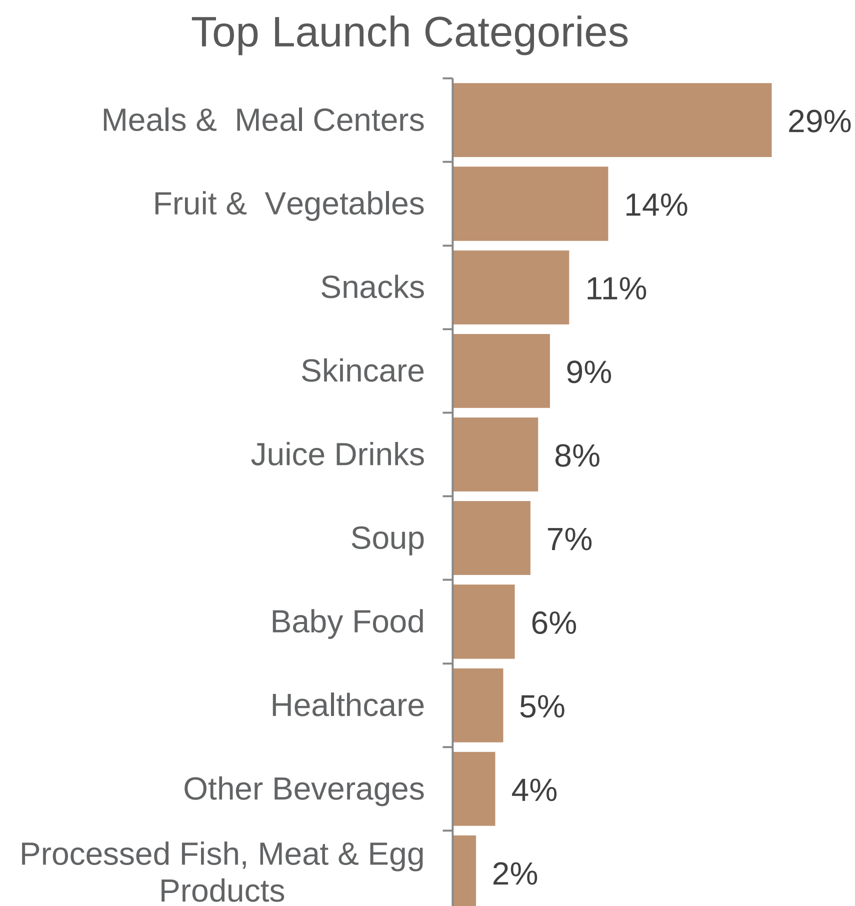
- A total of 282 products containing broccoli as an ingredient were launched globally within the last 3 months, which is up from the previous wave.
- There were 3 products containing broccoli launched in Australia in the past 3 months (see upcoming slide for more detail).
- Europe (31%), North America (30%) were the top regions for broccoli product launches.
- Flexible pack formats (29%) are the predominant form of packaging for launches in the last 3 months. This is consistent with the previous waves.
- The top categories for launches were meals (29%), fruit and vegetable products (14%), and snacks (11%).
- The core claims used for launches centred around convenience and health, with microwaveable being the top claim (31%), no additives or preservatives (29%) and low/no/reduced allergen (27%).
- The most innovative launch found was a Cereal Bar with Broccoli & Peas in the Czech Republic (see upcoming slides for more detail).

Source: Mintel (2015)

USA was the dominant country for broccoli product launches. Meals, fruit & vegetables and snacks were the main product categories.



282 Global Launches



Microwaveable is the most used claim on broccoli products, with no additives/preservatives and low/no/reduced allergen also popular claims. Flexible packaging is utilised across all regions.

Pack Formats Used

Global	Flexible	29%
Global	Tray	16%
Global	Flexible Sachet	11%
Europe	Flexible	31%
Europe	Tray	26%
Europe	Tub	7%
North America	Flexible	38%
North America	Tray	17%
North America	Flexible Sachet	12%

Top Claims Used

Global	Microwaveable	27%
Global	No Additives/Preservatives	26%
Global	Low/No/Reduced Allergen	22%
Europe	Microwaveable	34%
Europe	No Additives/Preservatives	26%
Europe	Vegetarian	24%
North America	Low/No/Reduced Allergen	45%
North America	Gluten Free	42%
North America	GMO-Free	42%

Only regions with n >30 are displayed

Innovative Broccoli Launches:
L3M (September – November 2015)

Imagine Natural Creations Organic Creamy Broccoli Soup (Philippines)

Imagine Natural Creations Organic Creamy Broccoli Soup is USDA organic and kosher certified. It is made with the pure taste of broccoli, slowly cooked vegetables, roasted garlic, and lightly seasoned. It is non-dairy, and free from GMOs, gluten, monosodium glutamate and artificial ingredients and preservatives. This microwaveable soup contains one vegetable serving per cup.

Claims:
No Additives/Preservatives, All Natural Product, Low/No/Reduced Allergen, GMO-Free, Organic, Ethical - Environmentally Friendly Package, Vegan, Kosher, Social Media, Time/Speed, Microwaveable, Gluten-Free, No Animal Ingredients

Labocare Everyday Mask (Hong Kong)

Product Description: Labocare Everyday Mask is described an easy and efficient skin treatment mask made with 10 kinds of super food extracts selected by the Times of America for having good effects on body and skin.

Claims:
Cleansing*, Botanical/Herbal, Ease of Use, Brightening / Illuminating*, Moisturising / Hydrating, Toning*

Barber Foods The Original Broccoli & Cheese Stuffed Breaded Chicken Breasts (USA)

Barber Foods The Original Broccoli & Cheese Stuffed Breaded Chicken Breasts have been relaunched, were previously under the Barber Foods brand name, feature a new recipe and have been repackaged to celebrate the 60 years of the company. They comprise rib meat and are filled with broccoli florets and a creamy blend of Swiss and American cheese. These all natural chicken breasts are USDA inspected and contain no artificial ingredients.

Claims:
Social Media, All Natural Product, Ethical - Environmentally Friendly Package, Limited Edition

M Signature Wm Morrison Minted Green Veg with Tenderstem Broccoli (UK)

M Signature Wm Morrison Minted Green Veg with Tenderstem Broccoli comprises tenderstem broccoli, cabbage, sweet leeks, tender green fine beans, sugar snap peas and spinach with a melting fragrant mint butter. Suitable for vegetarians, the microwaveable product provides one of the five-a-day, and retails in a 260g partly recyclable pack.

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

Source: Mintel (2015)

Innovative Broccoli Launches:
L3M (September – November 2015)

President's Choice Organics Broccoli and Spinach Wholegrain Puffs (Canada)

President's Choice Organics Broccoli and Spinach Wholegrain Puffs are made with wholegrain brown rice and white rice, and contain no colourings or artificial flavourings. The puffs have been processed according to the principles of organic agriculture and production, and are easy for toddlers to chew and swallow, They are described as a great tasting, convenient snack, and are an excellent source of iron.

Claims:

No Additives/Preservatives, Kosher, Ease of Use, Organic, Babies & Toddlers (0-4), Wholegrain

Cerea New Bar Cereal Bar with Broccoli & Peas (Czech Republic)

Cerea New Bar Cereální Tycinka Brokolice & Hrásek (Cereal Bar with Broccoli & Peas) is made with dried vegetables, including 20% of dried broccoli and 16% of dried peas and yogurt coating. The product is a source of fibre, free of preservatives and artificial colours, and retails in a 33g pack that provides one serving.

Claims:

No Additives/Preservatives

Pokphand Fiesta Cheesy Chicken with Broccoli (Indonesia)

Pokphand Fiesta Naget Ayam Isi Keju dan Brokoli (Cheesy Chicken with Broccoli) has been relaunched with a new brand. It is easy to prepare and is made from only selected fresh chicken, combined with other selected ingredients. This halal certified product retails in a newly designed 500g pack.

Claims:

Halal, Ease of Use, Microwaveable

Plum Organics Apple & Broccoli Stage 2 Organic Baby Food (Canada)

Plum Organics Apple & Broccoli Stage 2 Organic Baby Food is suitable for babies aged six months and up. This smooth-textured, simply blended baby food is unsweetened and unsalted, and contains no genetically modified ingredients or artificial ingredients. The kosher product is certified organic by USDA and Oregon Tilth. It retails in a 128ml BPA-free pack, featuring the B Certified Corporation logo.

Claims:

All Natural Product, GMO-Free, Kosher, Ethical - Environmentally Friendly Product, Low/No/Reduced Sugar, Ethical - Human, Organic, Low/No/Reduced Sodium, Babies & Toddlers (0-4)

Source: Mintel (2015)

Innovative Broccoli Launches:
L3M (September – November 2015)

Brad's Raw Cheeze Louise Broccoli Poppers (USA)

Brad's Raw Cheeze Louise Broccoli Poppers are said to be an excellent source of living nutrients and enzymes, as well as a source of vitamin A, vitamin C, iron and calcium. This USDA organic certified raw product is free of GMO, gluten and soy and is suitable for vegans. This snack is made with 1/4-lb. of veggies and seeds and is produced with vegan cheese made without nuts. Broccoli is described as one of the most nutrient-dense superfoods.

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

DJ&A Garden Basket Broccoli Chips (Singapore)

DJ&A Garden Basket Broccoli Chips are 100% natural. The gluten free product contains no added preservatives, no trans fat and is nutrient dense, one 25g portion being made up of around 70g of raw broccoli. It is cholesterol free and contains no added MSG, genetically modified vegetables, artificial colours, flavours ore preservatives. The halal product retails in a 25g pack.

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

Hilcona Tuscan Pasta with Tomatoes & Broccoli (Germany)

Hilcona Pasta Toscana mit Tomaten & Broccoli (Tuscan Pasta with Tomatoes & Broccoli) is now available. The product is a natural enjoyment for healthy eaters and is free from preservatives, flavour enhancers and artificial flavours. It is quick and easy to prepare in the microwave, suitable for ovo-vegetarians and retails in a 370g pack.

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

Evol. Veggie Cups Broccoli & Cheddar with Uncured Ham & Potato (USA)

Evol. Veggie Cups Broccoli & Cheddar with Uncured Ham & Potato is gluten free and contains 9g protein and 3g of fiber. The meal is made with pork raised without antibiotics and has been inspected and passed by the U.S. Department of Agriculture. It retails in a microwavable 5-oz. pack bearing the Facebook and Twitter logos.

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

Source: Mintel (2015)

Australian Broccoli Launches:
L3M (September – November 2015)

Malaysian Quick As Wok! Chicken Laksa

Malaysian Quick As Wok! Chicken Laksa is described as a fast and authentic microwavable meal. The product can be heated in two and a half minutes, and retails in a 350g pack

Claims:
Time/Speed, Microwaveable

Al & Dan's Home-Style Magic Meatballs Grass Fed Beef with Mushrooms

Al & Dan's Home-Style Magic Meatballs Grass Fed Beef with Mushroom is described to be a delicious alternative, made using only the highest quality Australian produce. It contains no artificial ingredients or preservatives, is healthy and nutritious and contains wholegrain breadcrumbs, four veggies and mushroom, herbs and spices and is coated in a crisp cornflake crumb.

Claims:
No Additives/Preservatives, All Natural Product, Wholegrain, Social Media, Microwaveable

Street Food Meal Pots Chicken Noodle Pad Thai

Street Food Meal Pots Chicken Noodle Pad Thai is new to the range. This fast and fresh ready-to-heat product can be ready in three minutes in a microwave and retails in a 290g pack, providing one serving.

Claims:
Ease of Use, Time/Speed, Microwaveable

Horticulture Innovation Australia
colmar brunton.

Source: Mintel (2015)

Chillies.

Purchase and consumption frequency have continued to decline across waves.

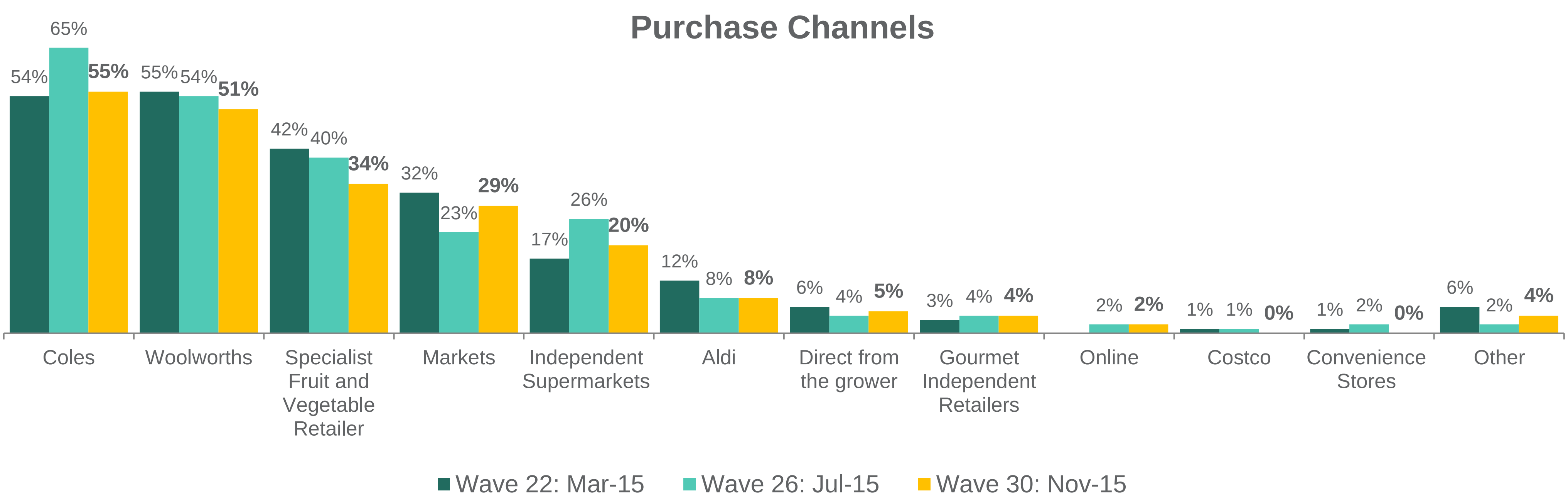
Coles and Woolworths remain the primary purchase channels for chillies, with specialist retailers seeing a continuous decline over the last three waves.

Average Purchase **3.7** times per month

- 4.0 times, Wave 22
- 3.8 times, Wave 26

Average Consumption **10.4** times per month

- 12.4 times, Wave 22
- 12.0 times, Wave 26



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 22 N=253, Wave 26 N=201, Wave 30 N=204

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Average Spend and Price Sensitivity.

Average weight of purchase

The typical consumer purchases **300g** of chillies, consistent with all previous waves.

- 300g, Wave 22
- 300g, Wave 26

Recalled last spend

Recalled last spend on chilli purchase was **$4.00,** consistent with the past three waves.

- $4.00, Wave 22
- $4.00, Wave 26

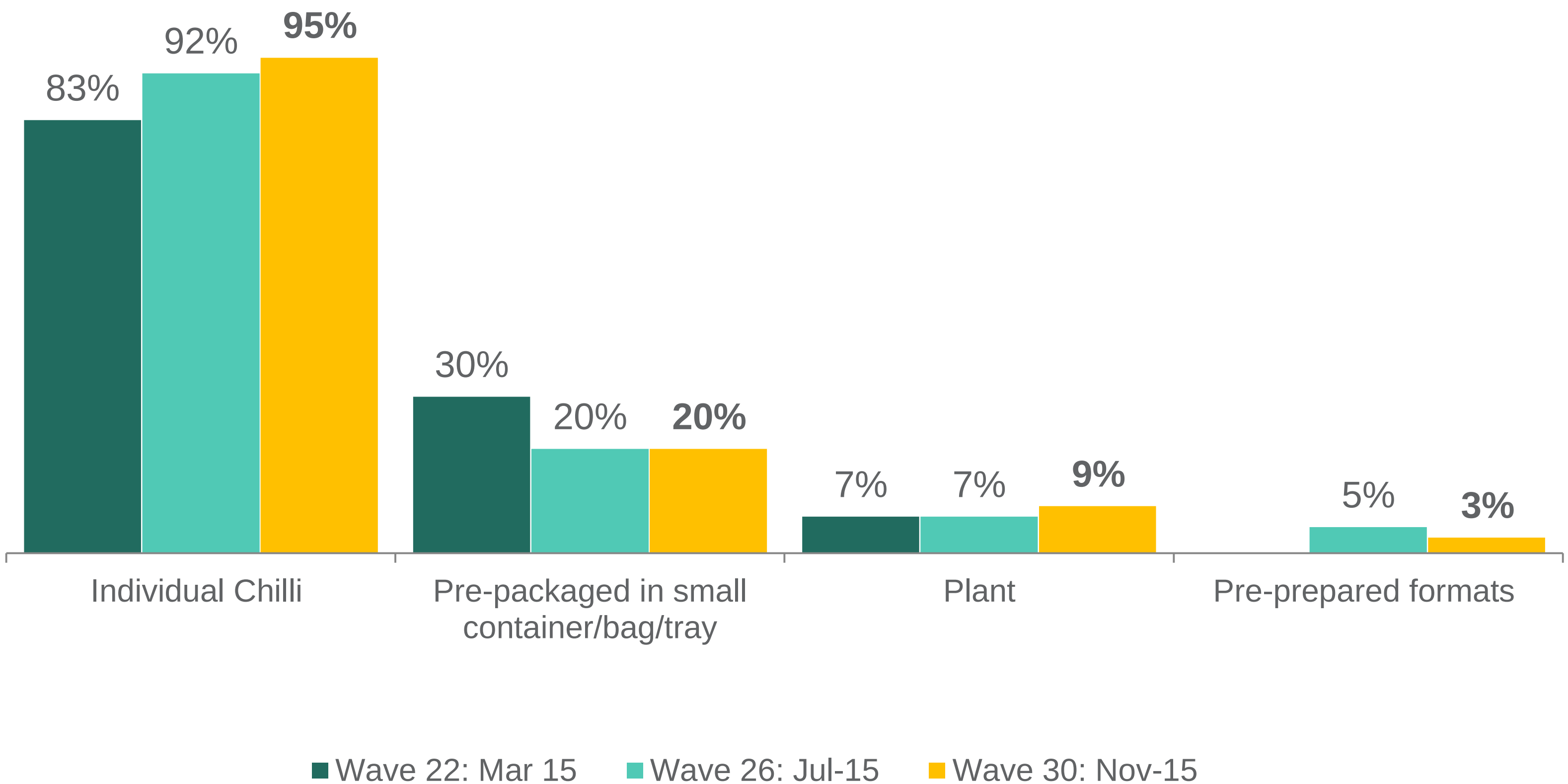
Value for money

Consumers' perceived value for money was relatively fair **(6.4/10)**, consistent with the last wave.

- ▼ 6.2/10, Wave 22
- 6.4/10, Wave 26

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 22 N=253, Wave 26 N=201, Wave 30 N=204

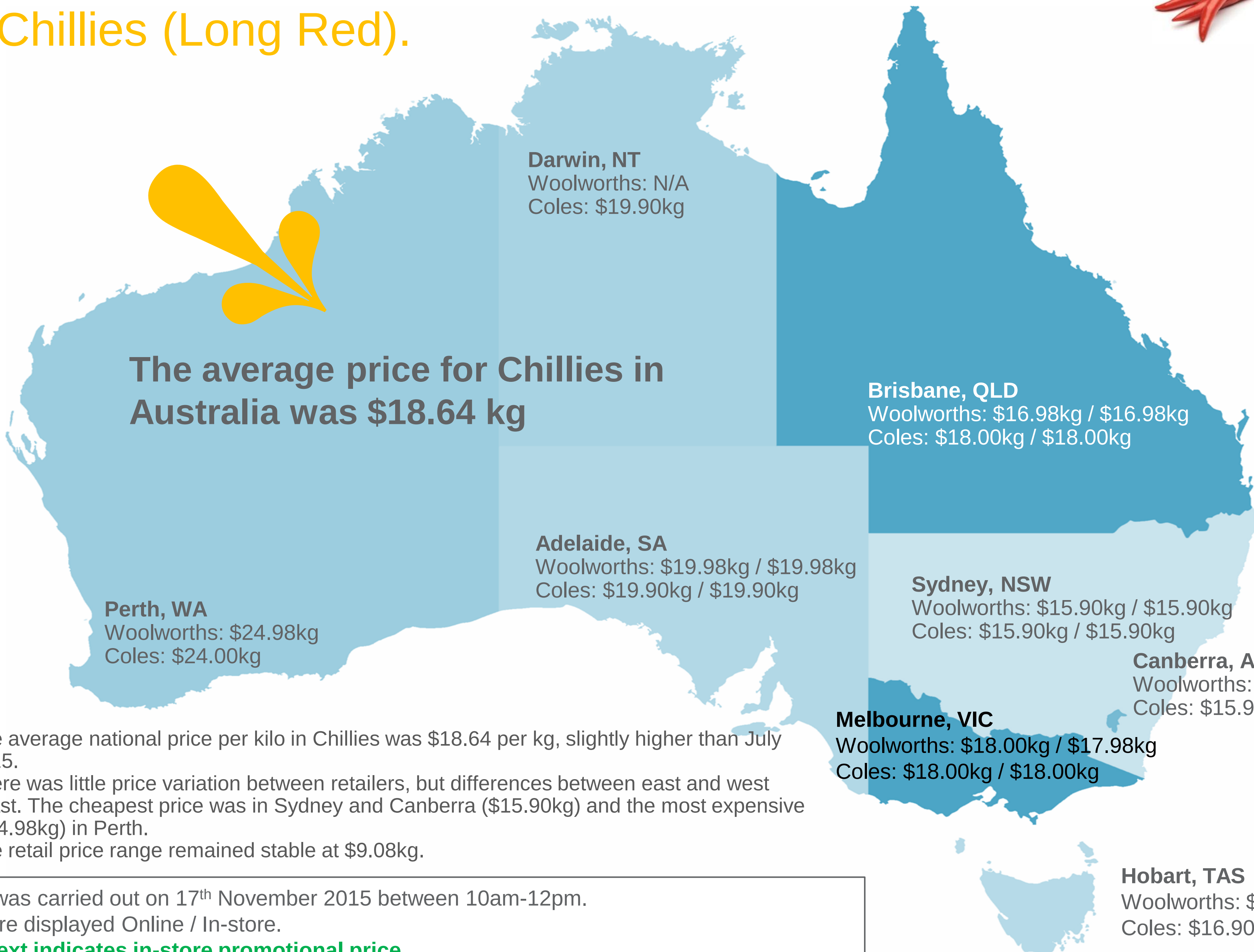
Individual chillies are the main format purchased, followed by pre-packaged small trays.



Q4b In what fresh formats do you typically purchase Chillies?
Sample Wave 22 N=253, Wave 26 N=201, Wave 30 N=204

Online and In-store Commodity Prices.

Chillies (Long Red).

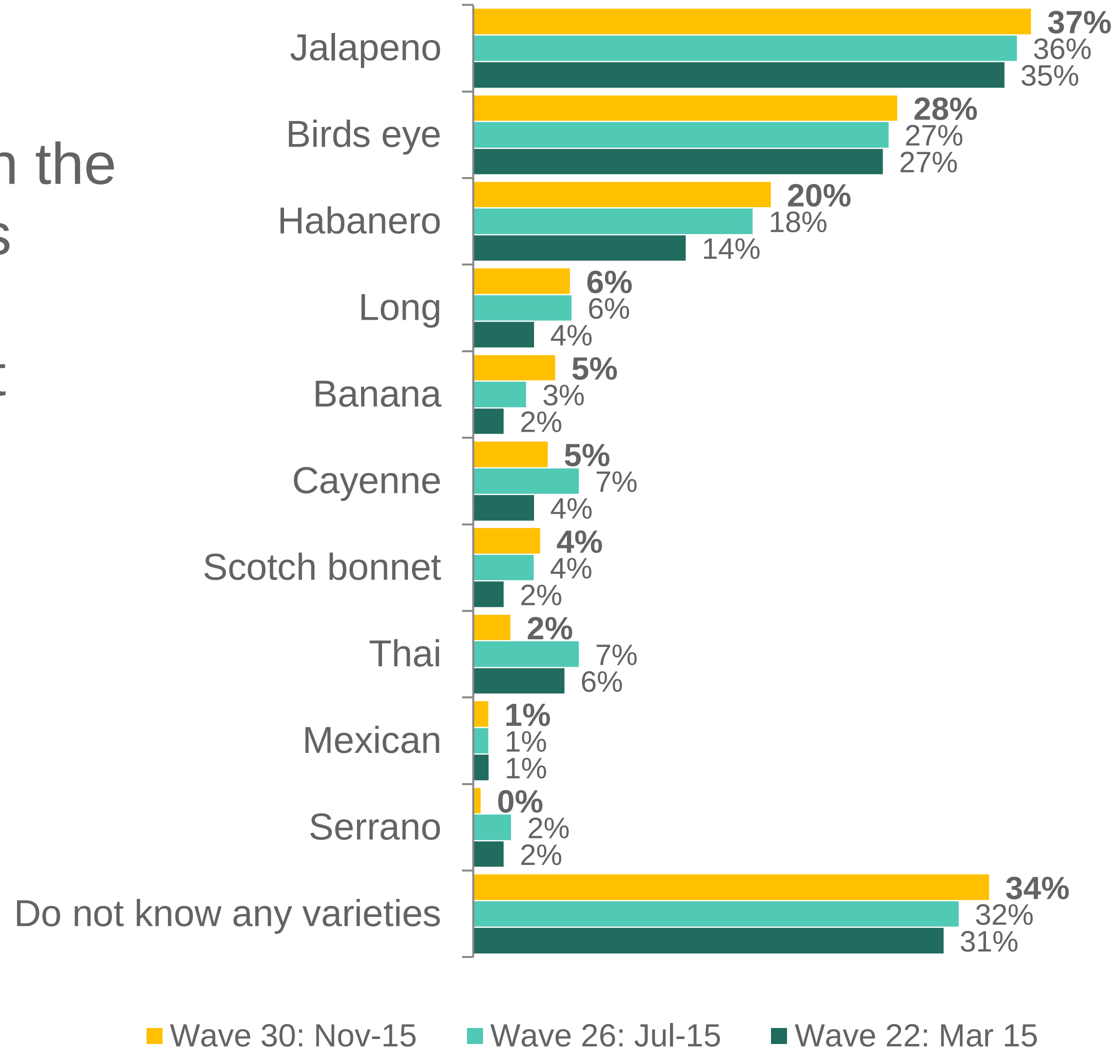


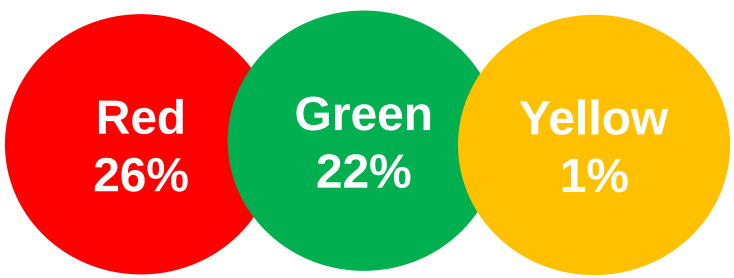
- The average national price per kilo in Chillies was $18.64 per kg, slightly higher than July 2015.
- There was little price variation between retailers, but differences between east and west coast. The cheapest price was in Sydney and Canberra ($15.90kg) and the most expensive ($24.98kg) in Perth.
- The retail price range remained stable at $9.08kg.

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

One third of consumers cannot recall a type of chilli.

Jalapeno and Birds eye remain the most recalled types. There has been a consistent increase in Habanero awareness over last three waves.

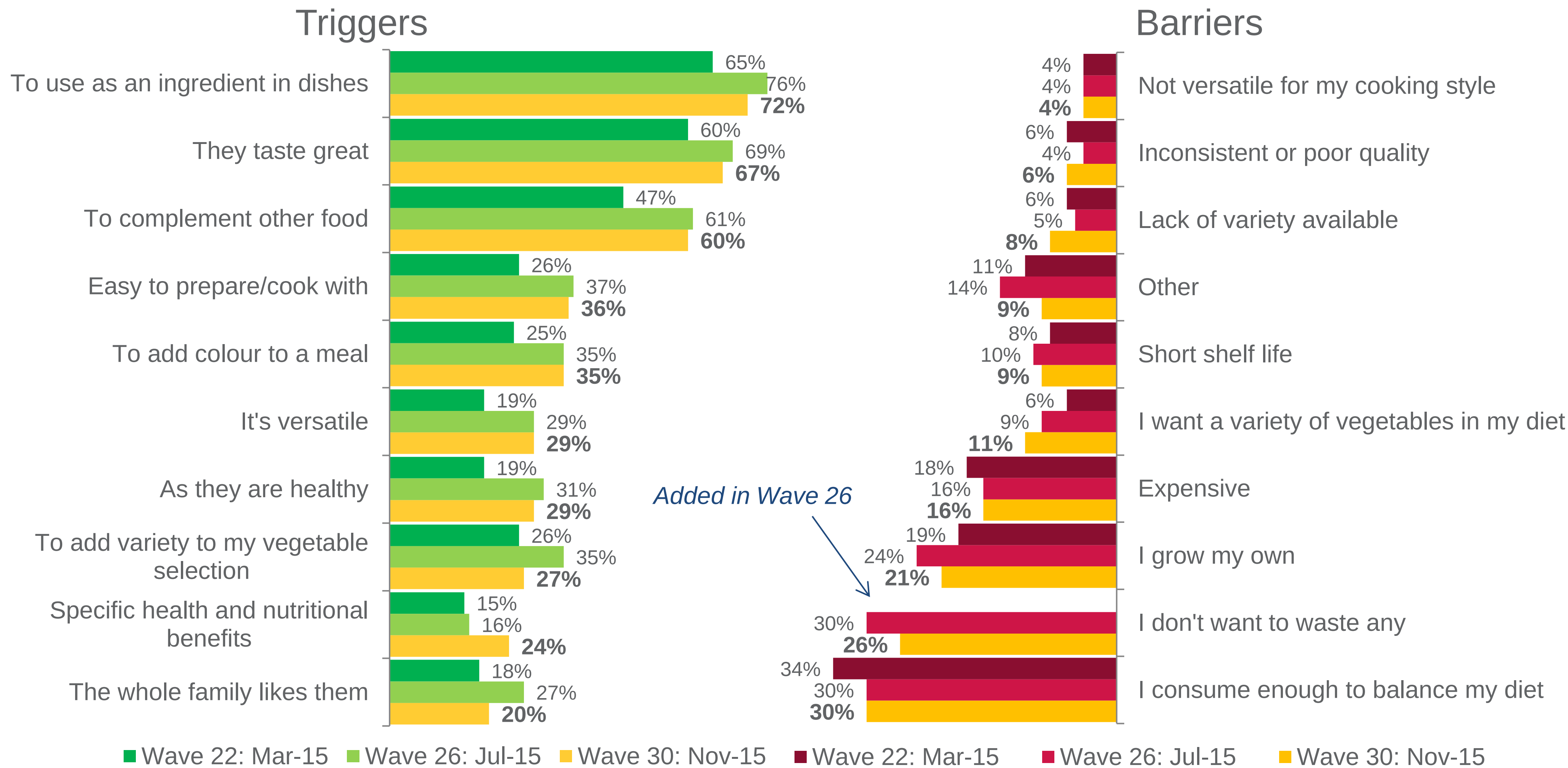




Chilli colour recall

Q6a. What types/varieties of <commodity> are you aware of? (unprompted)
Sample Wave 22 N=253, Wave 26 N=201, Wave 30 N=204

Three key triggers continue to drive chilli purchase: use as an ingredient in dishes, taste and complementing other food. Consuming enough for their needs and not wanting to waste any remain the main barriers to purchase.



Q7. Which of the following reasons best describes why you purchase <commodity> ?
Q8. Which reason best describes why you don't buy <commodity> more often?
Sample Wave 22 N=253, Wave 26 N=201, Wave 30 N=204

Chillies are popular in Asian and Italian cuisine, consistent with previous waves.

Consumers are typically eating chillies for dinner. Chillies are also popular when cooking new recipes.

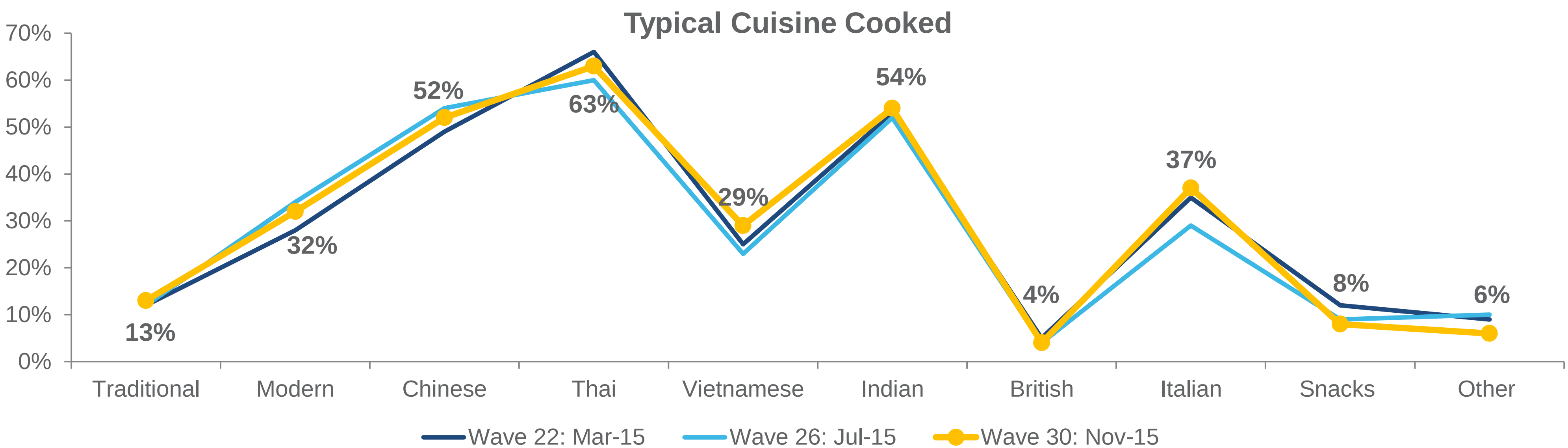
Top 5 Consumption Occasions

	Wave 26	Wave 30
Dinner	79%	**76%**
Family Meals	68%	**63%**
Weekday Meals	54%	**53%**
Weekend Meals	52%	**51%**
Quick Meals	50%	**48%**

41% used chillies when cooking a new recipe

▼ 30%, Wave 22

▲ 42%, Wave 26



Australian — Asian — European — Snacks

Q10. What cuisines do you cook/consume that use <commodity> ?
Q11. Which of the following occasions do you typically consume/use <commodity> ?
Sample Wave 22 N=253, Wave 26 N=201, Wave 30 N=204

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Onions and capsicums remain the main vegetables that are served with chillies. Consumers prefer to stir-fry chillies, whilst frying and slow cooking are also common cooking styles.

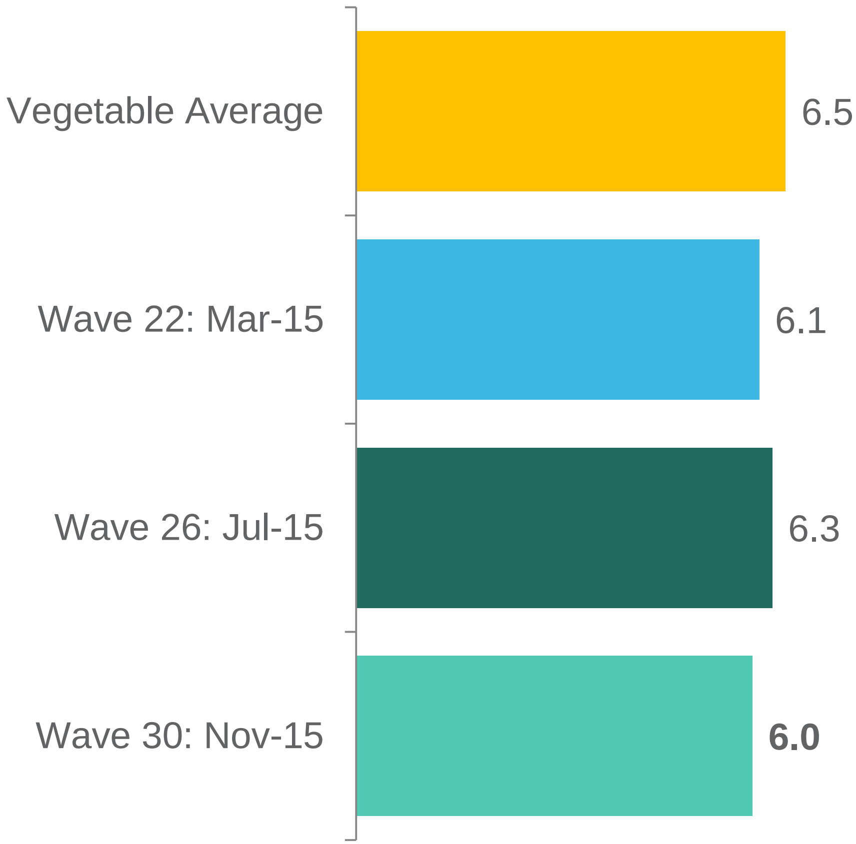
Accompanying Vegetables

Onion	62%
Capsicum	60%
Garlic	56%
Tomato	52%
Carrot	43%

Top 10 Cooking Styles			
	Wave 22	Wave 26	Wave 30
Stir frying	75%	74%	**76%**
Frying	21%	44%	**45%**
Slow Cooking	29%	38%	**32%**
Sautéing	32%	33%	**30%**
Soup	29%	36%	**28%**
Raw	24%	31%	**27%**
Roasting	16%	23%	**19%**
Grilling	13%	11%	**16%**
Baking	9%	14%	**14%**
Boiling	4%	8%	**5%**

Q9. How do you typically cook <commodity> ?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
Sample Wave 22 N=253, Wave 26 N=201, Wave 30 N=204

Importance of provenance declined this wave, which is below the Vegetable Average. This may be due to consumers only purchasing a small amount of chillies per shop compared with other vegetables.



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Q14. When purchasing <commodity>, how important is Provenance to you?
Q15. And when purchasing Chillies, how important is that it is grown in Australia?
Sample Wave 22 N=253, Wave 26 N=201, Wave 30 N=204

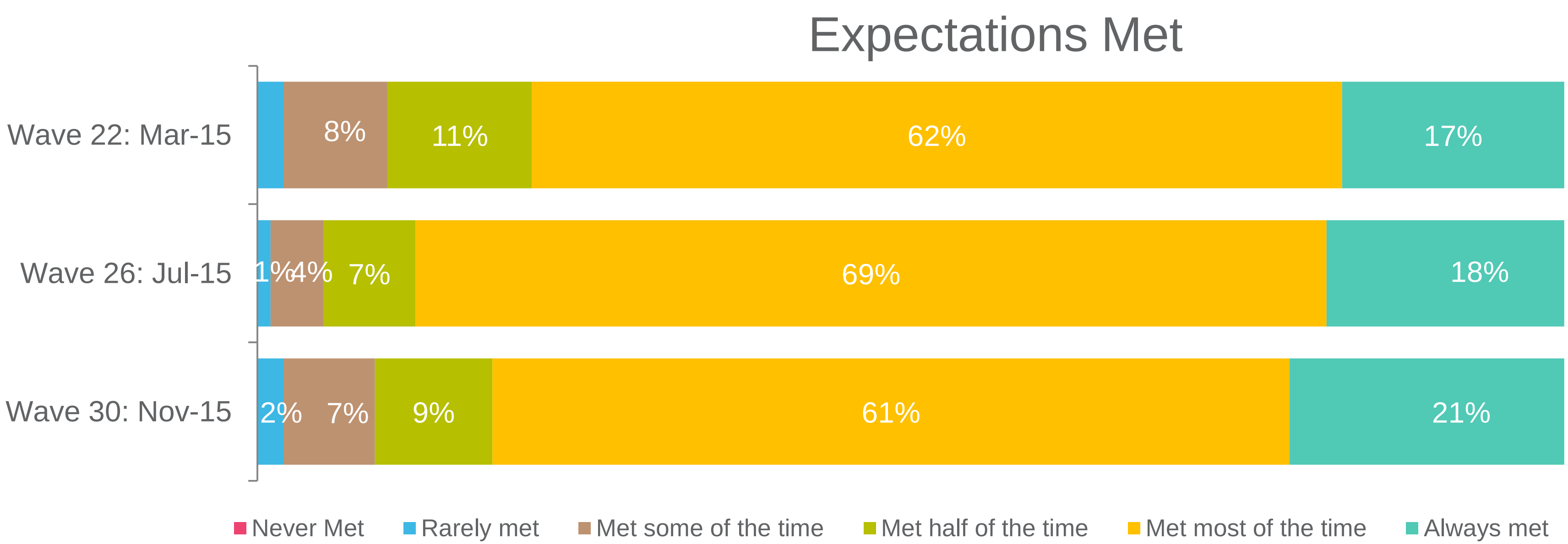
Freshness expectations have improved this month with over one fifth of consumers stating that their expectations were always met.

The expected shelf life of chillies continues its downward trend but remains over 10 days, which is relatively substantial compared to other commodities.

Expected to stay fresh for **10.4** days

11.4 days, Wave 22

10.9 days, Wave 26



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 22 N=253, Wave 26 N=201, Wave 30 N=204

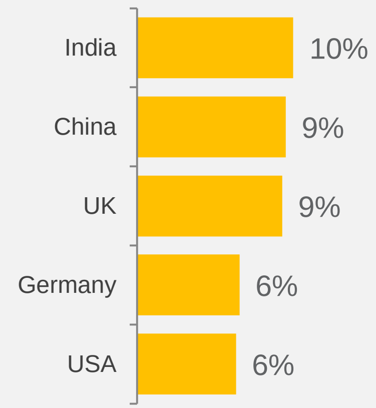
Chillies Product Launch Trends.

Chilli Global Launches

September – November 2015

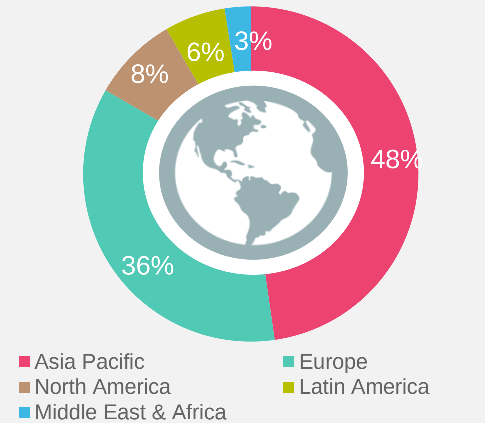
There were 2800 new products launched in the last 3 months that contained chilli as an ingredient. The majority of these launches were in the Asia Pacific and Europe regions. The top product launches categories were sauces & seasonings and snacks.

Country

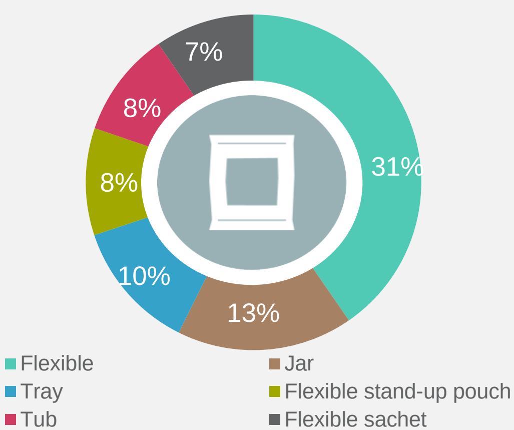


2800 Global NPDs

Region



Top Pack Formats



Categories

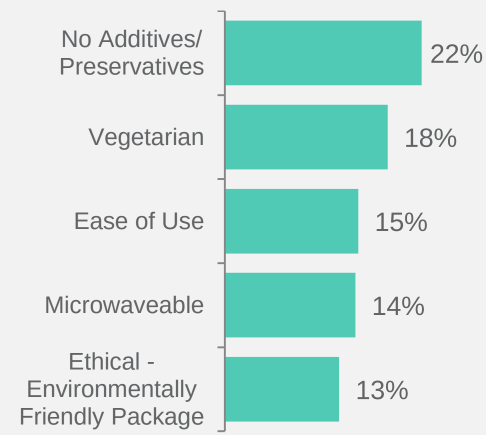
Sauces & Seasoning 31%

Snacks 25%

Meals 21%

Processed Products 10%

Top Claims

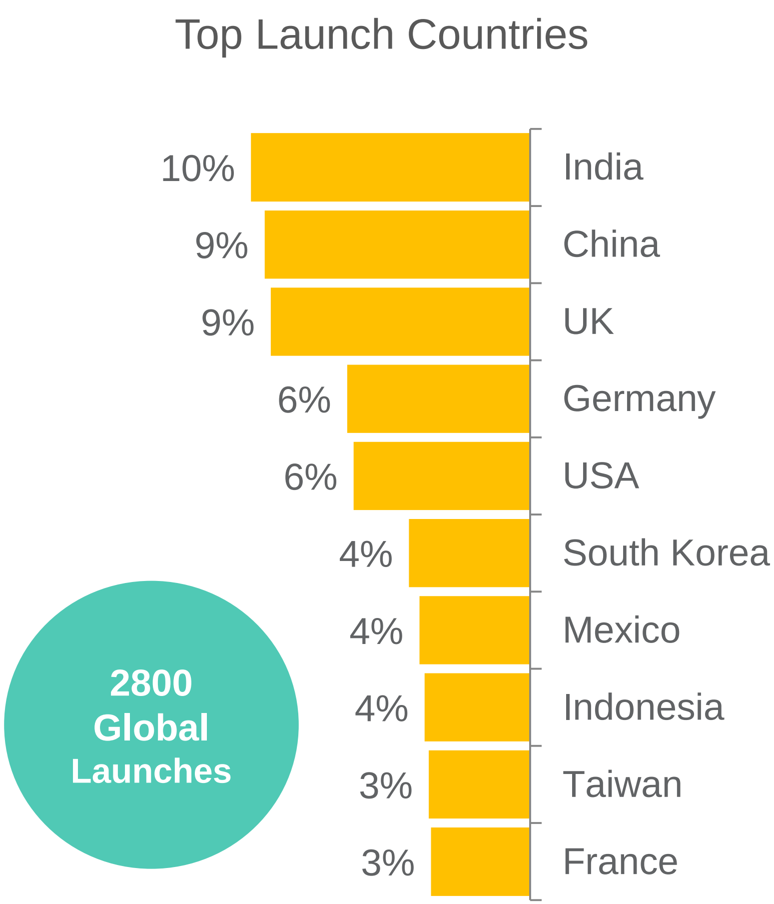


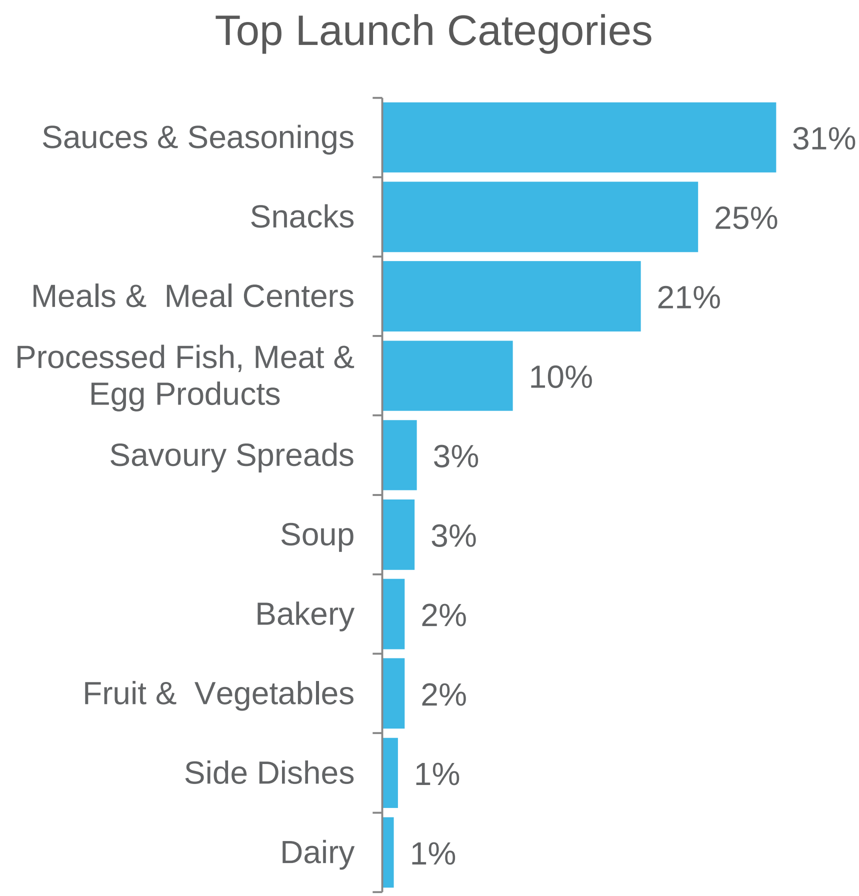
Chilli Product Launches:
Last 3 Months (September – November 2015)
Summary

- A total of 2800 products that contained chilli as an ingredient have been launched globally in the last 3 months.
- There were 77 chilli products launched in Australia – slightly more than in the previous wave.
- The two main regions for launches are Asia Pacific (48%) and Europe (36%).
- Flexible packaging (31%) and jars (13%) remained the main formats used for chilli launches.
- Top categories for launches are sauces and seasoning (31%) and snacks (25%).
- The key claims used are no additives/preservatives (22%) and vegetarian (18%).
- The most innovative products are Spicy Tortilla Wraps in Poland, and Hot Lollipops from Mexico (see upcoming slides for more details).

Source: Mintel (2015)

India and China have had the greatest number of launches over the past three months. The majority of products are launched as sauces, snacks and meals.





No additives & preservatives is the key claim used on products containing chilli. Flexible formats are the main type of packaging used, being the top format in each region.

Pack Formats Used

Global	Flexible	31%
	Jar	13%
	Tray	7%
Asia Pacific	Flexible	36%
	Jar	12%
	Flexible Sachet	10%
Europe	Flexible	24%
	Tray	19%
	Jar	13%

Top Claims Used

Global	No Additives/Preservatives	22%
	Vegetarian	18%
	Halal	9%
Asia Pacific	No Additives/Preservatives	23%
	Vegetarian	23%
	Halal	18%
Europe	Ethical - Environmentally Friendly Package	22%
	No Additives/Preservatives	19%
	Microwaveable	18%

Only shown regions > 30 products launched

Innovative Chilli Launches:
L3M (September – November 2015)

El Tequito Spicy Tortilla Wraps (Poland)

El Tequito Pikantne Placki Pszenne (Spicy Tortilla Wraps) have been repackaged. These microwaveable wraps have been made with wheat, red pepper and chilli peppers, and retail in a 370g pack containing six units measuring 25cm in diameter each.

Claims:
Vegan, Microwaveable, Ease of Use, No Animal Ingredients, Vegetarian, Wholegrain

Felix Crispers Hot Chilli Flavoured Roasted Peanuts in Crispy Shell (Poland)

Felix Crispers Smazone Orzeszki Ziemne w Chrupkiej Skorupce o Smaku Chilli (Hot Chilli Flavoured Roasted Peanuts in Crispy Shell) are now available. The product contains whole peanuts, it is said to be very crunchy, and retails in a 200g pack.

Claims:
N/A

Tesco American Style Loaded BBQ Pulled Pork Pizza (UK)

Tesco American Style Loaded BBQ Pulled Pork Pizza comprises a deep pizza base with BBQ tomato sauce, mozzarella cheese, pulled pork, sweetcorn, red onion and sweet and tangy sauce. The product and cooks from frozen in 26 minutes, contains no artificial flavours or colours, and retails in a 447g recyclable pack.

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

Mister Pop's Cabezón Hot Lollipops (Mexico)

Mister Pop's Cabezón Hot Paletas de Caramelo Macizo (Lollipops) are now available. The product retails in a 261.6g pack that contains 24 x 10.9g pack in the following flavours: sandía con chile (watermelon and chili); piña con chile (pineapple and chili); and manzana verde con chile (green apple with chili).

Claims:
N/A

Source: Mintel (2015)

Innovative Chilli Launches:
L3M (September – November 2015)

Gazda Spicy Bryndza Cheese Spread (Czech Republic)

Gazda Bryndzová Pomazánka Pikantní (Spicy Bryndza Cheese Spread) is now available. This product is retailed in a 120g pack.

Claims:
N/A

The Modern Gourmet Grilling Seasoning Collection (USA)

The Modern Gourmet Grilling Seasoning Collection comprises the following nine seasonings: Montreal spice blend; chipotle lime seasoning; jerk spice blend; cajun dry rub; chili sea salt; garlic sea salt; onion sea salt; curry sea salt; and rosemary sea salt. The product retails in a 13.6-oz. pack.

Claims:
N/A

Tong Garden Spicy B.B.Q. Sunflower Kernels (Malaysia)

Tong Garden Spicy B.B.Q. Sunflower Kernels have been repackaged. They are said to have a superior quality for a fun time and be crunchy. The halal certified product is suitable for vegetarians and retails in a 110g pack containing 10 x 11g packets.

Claims:
Halal, Low/No/Reduced Transfat, Vegetarian, Low/No/Reduced Cholesterol

Pringles Spicy Chilli Tortilla Chips (Brazil)

Pringles Salgadinho de MilhoTipo Tortillas Sabor Pimenta Picante (Spicy Chilli Tortilla Chips) are now available. The flavored product is suitable for vegetarians and retails in a 180g pack featuring a QR code.

Claims:
Vegetarian

Source: Mintel (2015)

Innovative Chilli Launches:
L3M (September – November 2015)

Rocky Mtn Provisions Sweet Cajun Fire Trail Mix (USA)

Rocky Mtn Provisions Sweet Cajun Fire Trail Mix is created in Denver, Colorado with the finest quality ingredients including butter toffee and honey roasted peanuts, zesty peanuts, honey roasted and Cajun sesame mix, and hot Cajun corn sticks. The on-the-go product is kosher certified, contains no artificial colors, flavors or hydrogenated oils, and retails in an 18-oz. bag.

Claims:
No Additives/Preservatives, Low/No/Reduced Transfat, Kosher, On-the-Go

Bravo Snack Me! Hot Chilli Flavoured Tortilla Chips (Germany)

Bravo Snack Me! Maischips mit Chili (Hot Chilli Flavoured Tortilla Chips) are fried with sunflower oil, and are made in a sustainable and resource sparing way. The product retails in a 300g pack.

Claims:
Ethical - Environmentally Friendly Product

Asda Hot & Spicy Beetroot (UK)

ASDA Hot & Spicy Beetroot consists of British beetroot with chilli powder, pickled in acetic acid and spirit vinegar with sugar and sweetener. It contains no artificial colours or flavours and is suitable for vegetarians. This product retails in a 440g recyclable pack.

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

Clover Sunflower Oil Cooking Spray with Chilli Extract (UK)

Clover Sunflower Oil Cooking Spray with Chilli Extract is quick and easy to use and ideal for all the cooking needs. With 86% less fat than butter and 46% less saturated fat than olive oil, this non-stick sunflower oil emulsion can be used for healthier cooking every day. This vegetarian product retails in a 120ml recyclable pack.

Claims:
Low/No/Reduced Saturated Fat, Ethical - Environmentally Friendly Package, Low/No/Reduced Fat, Time/Speed, Ease of Use, Vegetarian

Source: Mintel (2015)

Australian Chilli Launches:
L3M (September – November 2015)

Doritos Thai Sweet Chilli Corn Chips

Mad Dog Chilli Sauce

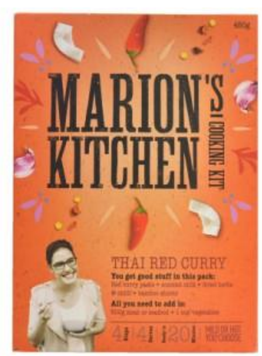
The Pure Produce Company The Perfect Entertainer Original Dips Pack

Smith's Limited Edition KFC Zinger Flavour Crinkle Cut Potato Chips

Connoisseur Mini Mexican Chili Chocolate with Churros Gourmet Ice Cream

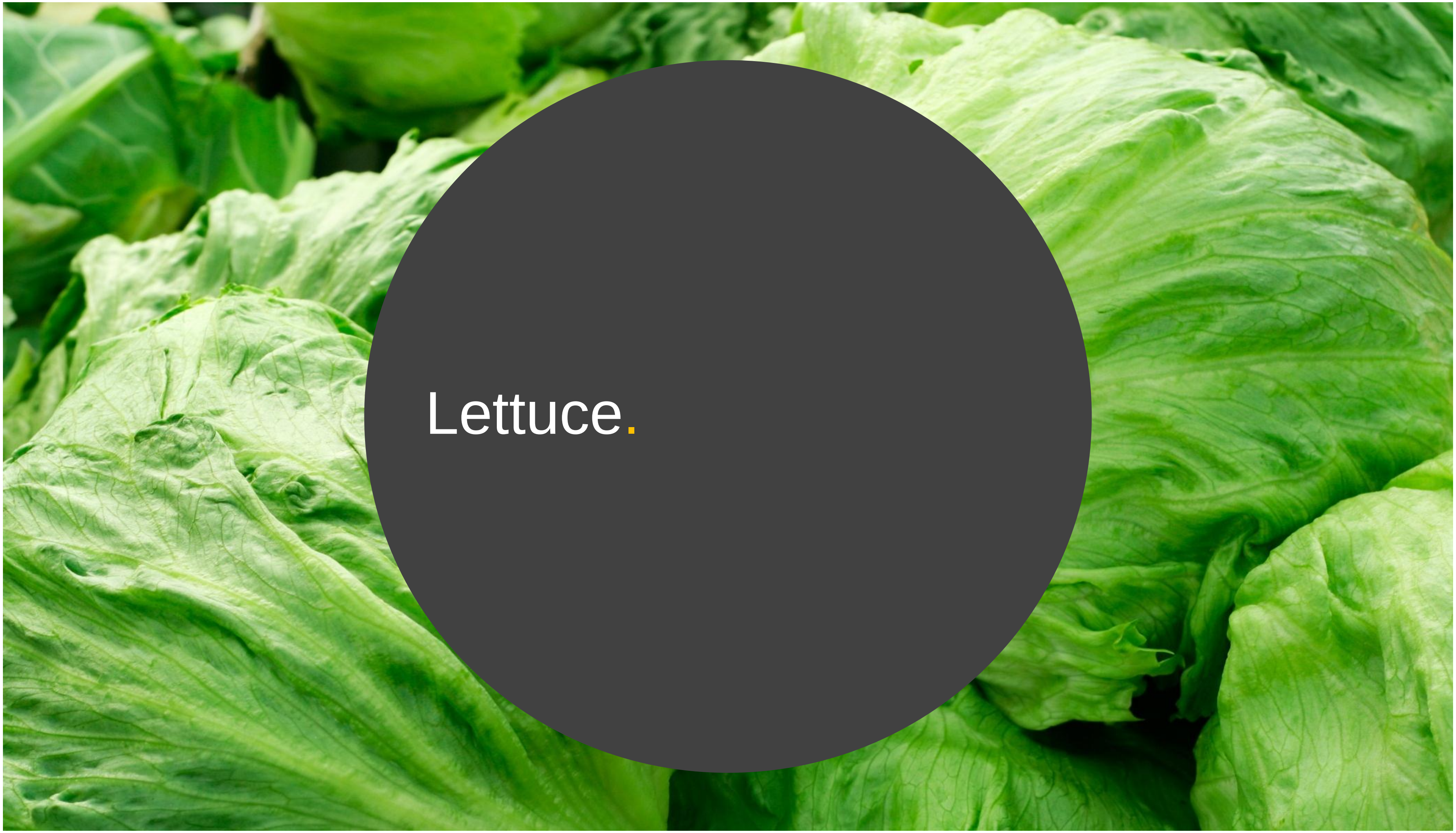
Pratt's Popcorn Spanish Tomato Popcorn

Marion's Kitchen Thai Red Curry Cooking Kit



Old El Paso Restaurante Pork al Pastor Seasoning for Pork

Source: Mintel (2015)



Lettuce.

Purchase and consumption of lettuce have both increased this wave, with consumption occurring once every two days on average.

Mainstream retailers remain the primary channel of purchase for consumers, whilst there is an increasing trend in independent supermarkets as a purchase channel.

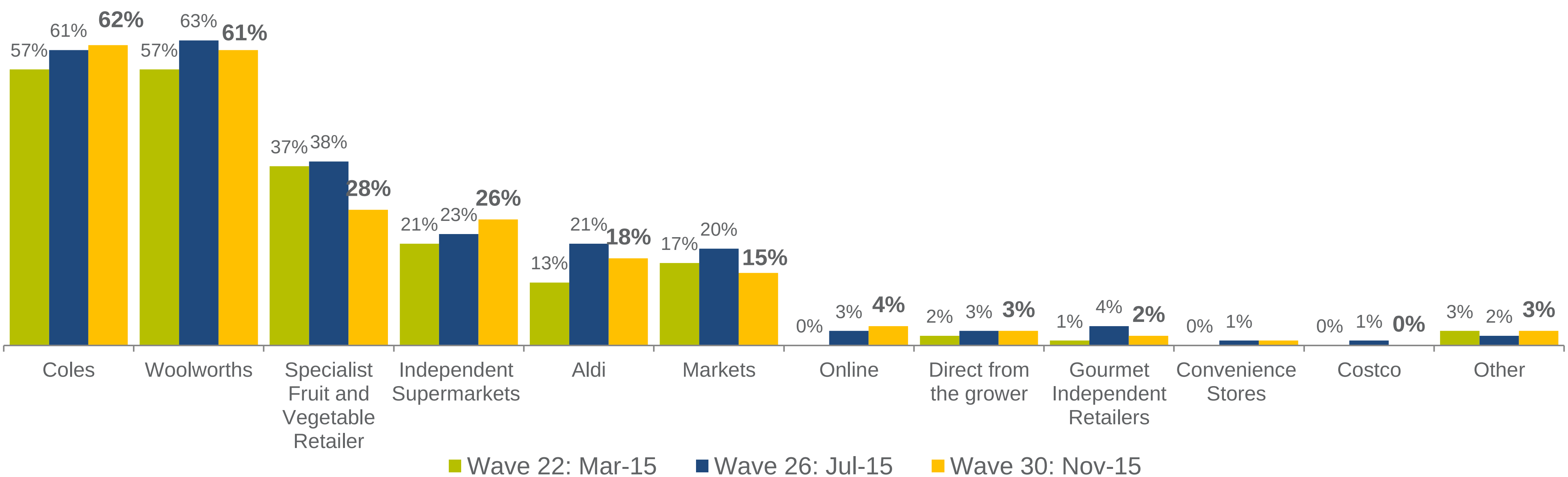
Average Purchase **4.4** times per month

▲ 4.6 times, Wave 22
▼ 4.2 times, Wave 26

Average Consumption **14.7** times per month

▼ 14.0 times, Wave 22
▼ 13.1 times, Wave 26

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 22 N=314, Wave 26 N=312, Wave 30 N=304

Horticulture Innovation Australia

colmar brunton.

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

Average Spend and Price Sensitivity.

Average weight of purchase

The typical consumer purchases **700g** of lettuce, which is consistent with the previous wave.

▼ 600g, Wave 22
— 700g, Wave 26

Recalled last spend

Recalled spend on lettuce was **$2.70.** This has trended downwards over the last three waves.

▲ $3.30, Wave 22
▲ $2.90, Wave 26

Value for money

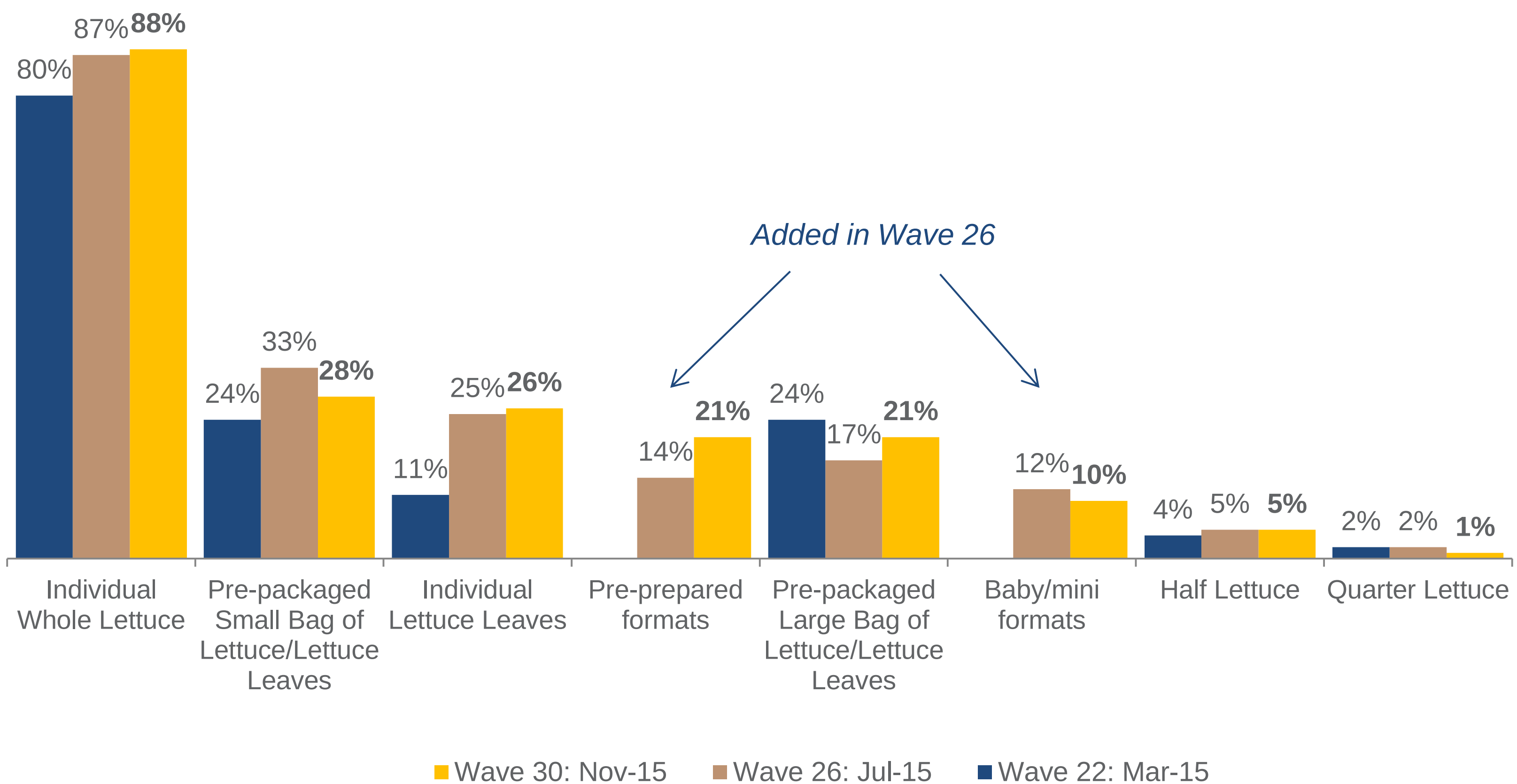
Consumers' perceived value for money is fair **(6.3/10)**, slightly lower than the past wave.

▼ 6.0/10, Wave 22
▲ 6.4/10, Wave 26

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 22 N=314, Wave 26 N=312, Wave 30 N=304

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

Individual lettuce heads are purchased by the majority of consumers. This wave sees a continued increase in purchase of individual lettuce leaves as well as pre-prepared formats.



Q4b In what fresh formats do you typically purchase Lettuce?
Sample Wave 22 N=314, Wave 26 N=312, Wave 30 N=304

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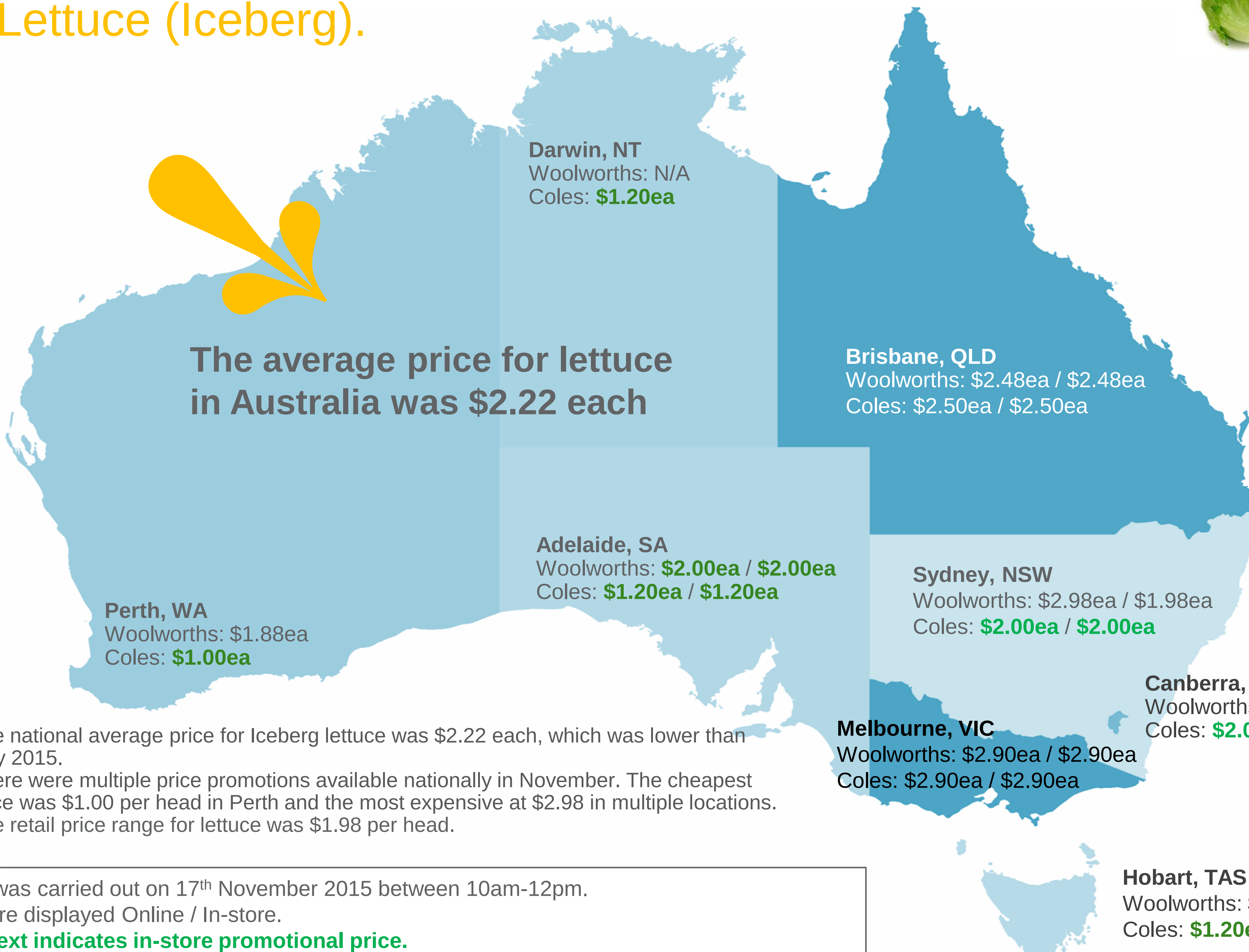
Online and In-store Commodity Prices.

Lettuce (Iceberg).

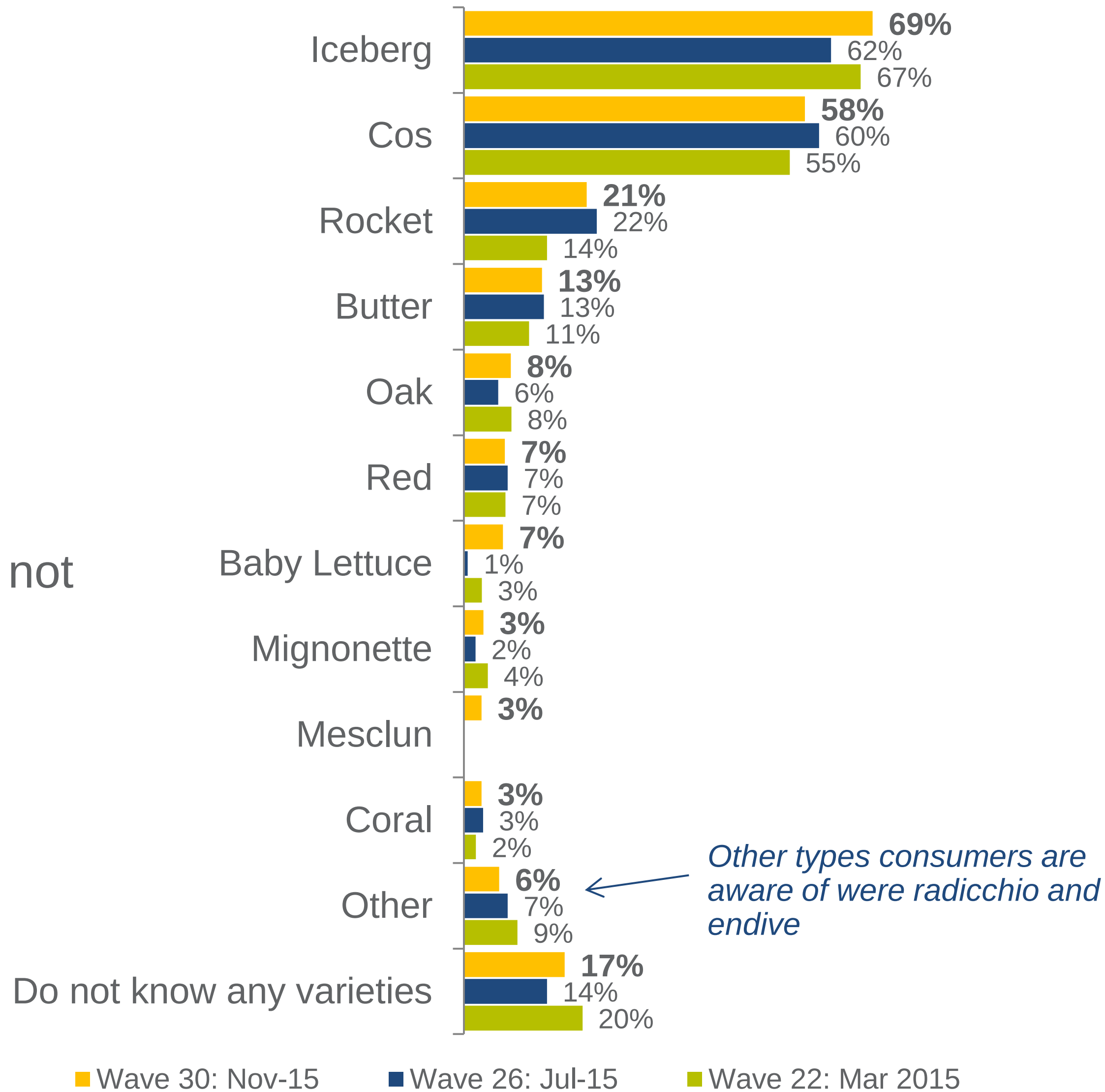


- The national average price for Iceberg lettuce was $2.22 each, which was lower than July 2015.
- There were multiple price promotions available nationally in November. The cheapest price was $1.00 per head in Perth and the most expensive at $2.98 in multiple locations.
- The retail price range for lettuce was $1.98 per head.

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

A large proportion of consumers are aware of different varieties of lettuce. Iceberg and Cos continue to have the greatest level of recall.

Some of the lettuce types recalled are not actually lettuce, although consumers perceive them to be, such as rocket, endive and radicchio.



Q6a. What types/varieties of <commodity> are you aware of? (unprompted)
Sample Wave 22 N=314, Wave 26 N=312, Wave 30 N=304

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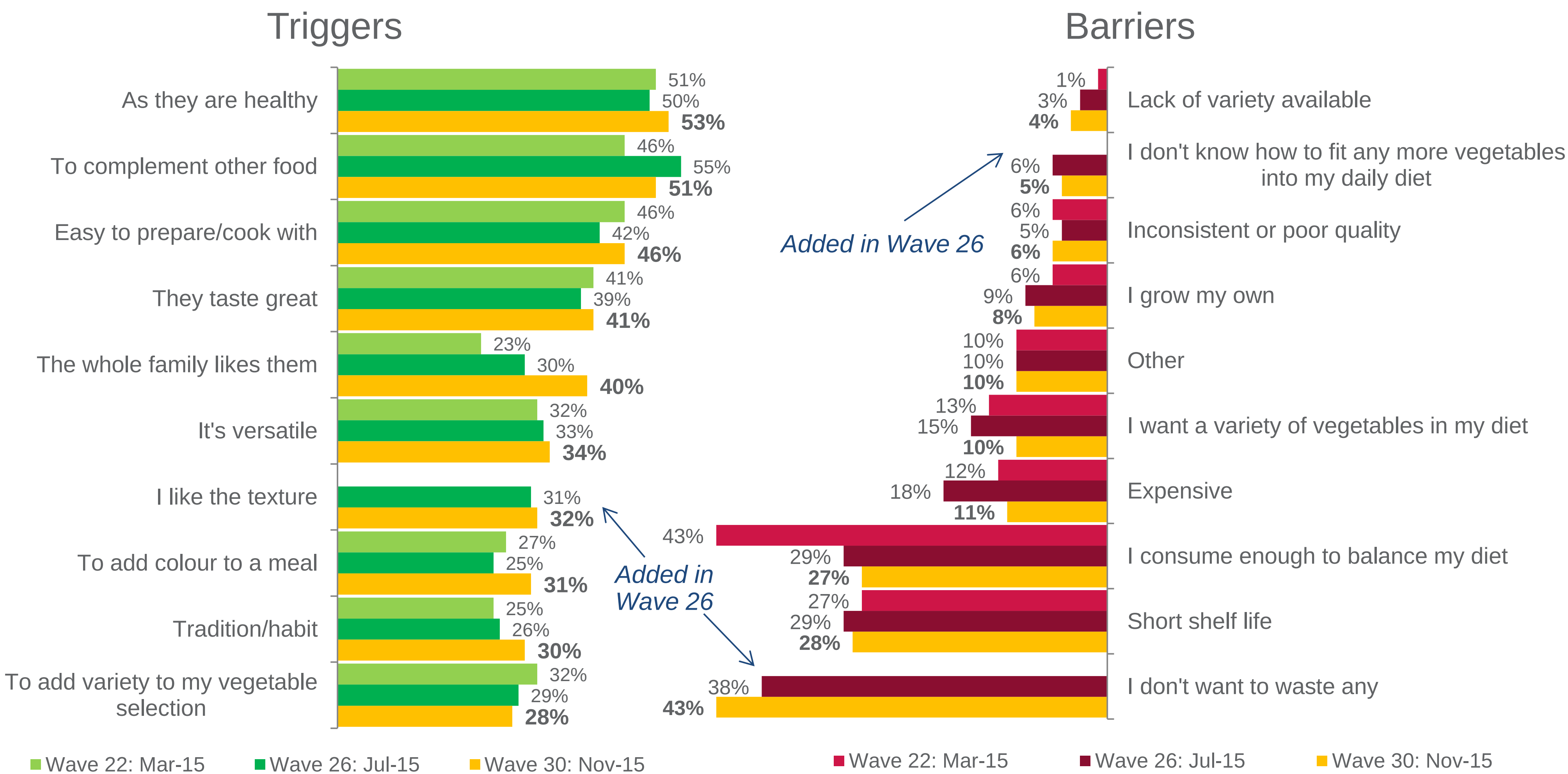
Purchasing lettuce is triggered by health, complementing other food, and ease of preparation. Not wanting to waste any and a short shelf life are key barriers to purchase, consistent with the previous wave.



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 22 N=314, Wave 26 N=312, Wave 30 N=304

Australian cuisine remains the most popular style cooked, with all cuisines remaining consistent with the previous wave.

Lettuce consumption continues to be most popular during lunch and dinner occasions.

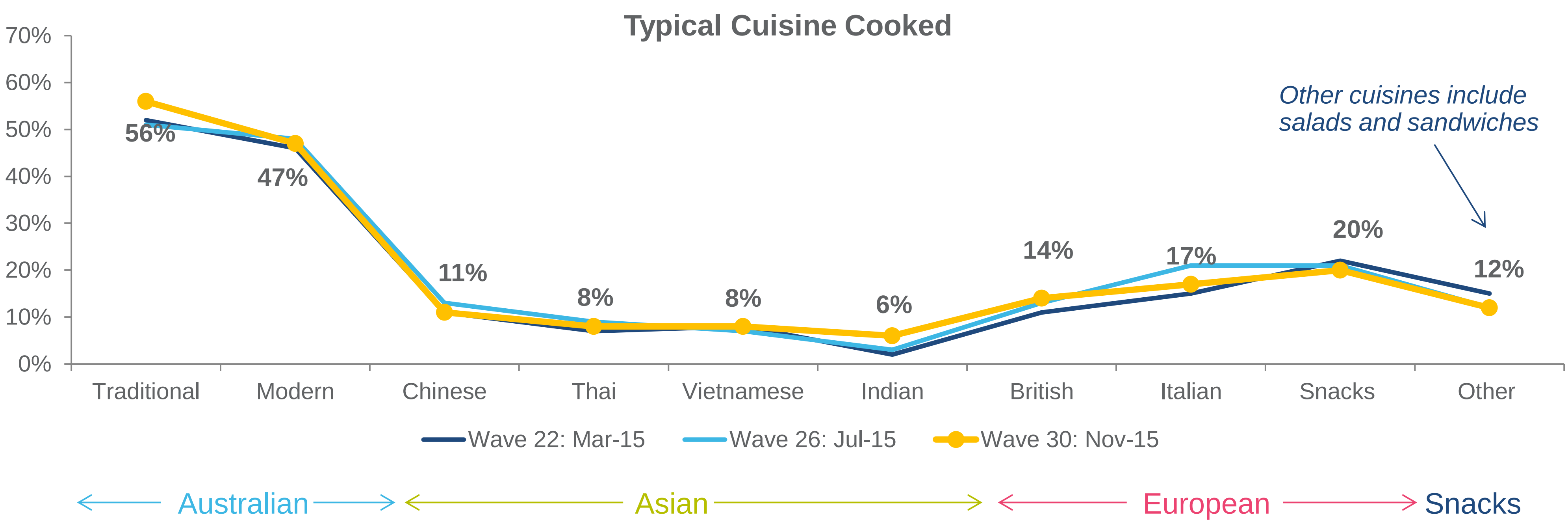
Top 5 Consumption Occasions

	Wave 26	Wave 30
Lunch	73%	**64%**
Dinner	58%	**61%**
Quick Meals	57%	**56%**
Family Meals	51%	**53%**
Weekend Meals	43%	**42%**

9% used lettuce when cooking a new recipe

▼ 4%, Wave 22

▲ 11%, Wave 26



Q10. What cuisines do you cook/consume that use <commodity> ?
Q11. Which of the following occasions do you typically consume/use <commodity> ?
Sample Wave 22 N=314, Wave 26 N=312, Wave 30 N=304

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

The majority of lettuce is eaten raw and served with tomatoes, carrots and cucumber.

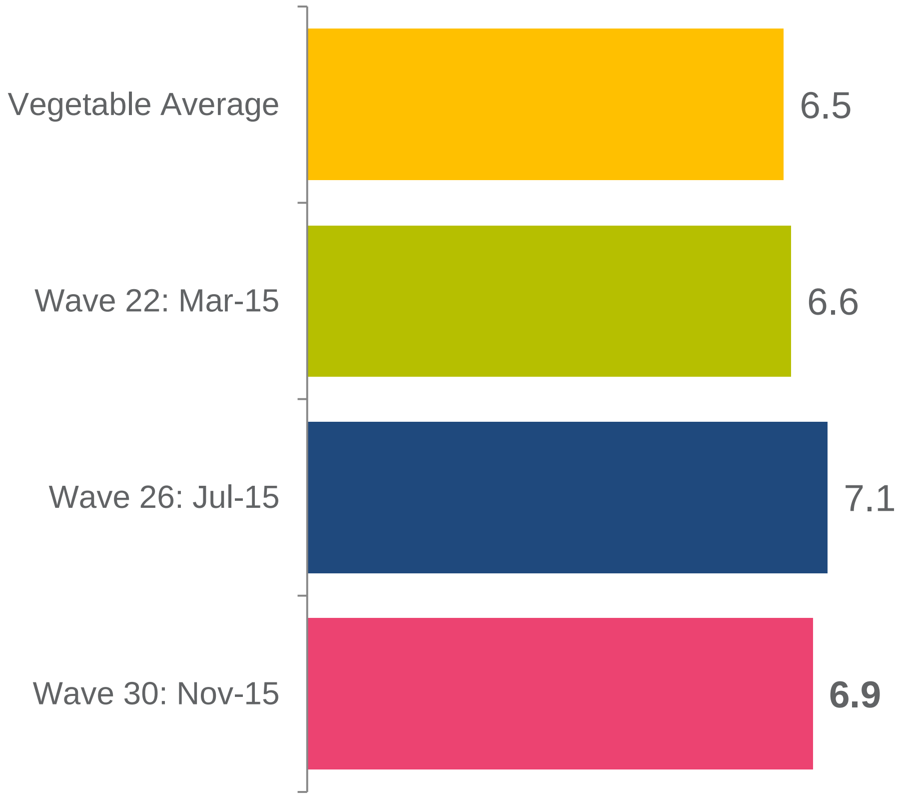
Accompanying Vegetables

Tomato	85% ▲
Carrot	61% ▲
Cucumber	53% ▲
Capsicum	52% ▼
Onion	42% –

Top 10 Cooking Styles			
	Wave 22	Wave 26	**Wave 30**
Raw	71%	81%	**80%**
Other	21%	13%	**17%**
Stir frying	7%	7%	**6%**
Soup	3%	4%	**3%**
Steaming	2%	3%	**2%**
Microwave	1%	0%	**1%**
Grilling	0%	0%	**1%**
Boiling	2%	4%	**1%**
Slow Cooking	0%	1%	**1%**
Baking	0%	0%	**1%**

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 22 N=314, Wave 26 N=312, Wave 30 N=304

Lettuce provenance is slightly lower this wave. However, knowing that lettuce is grown in Australia is highly important information for consumers.



8.3

Q14. When purchasing <commodity>, how important is Provenance to you?
Q15. And when purchasing Lettuce, how important is that it is grown in Australia?
Sample Wave 22 N=314, Wave 26 N=312, Wave 30 N=304

Expected shelf-life has remained stable this wave.

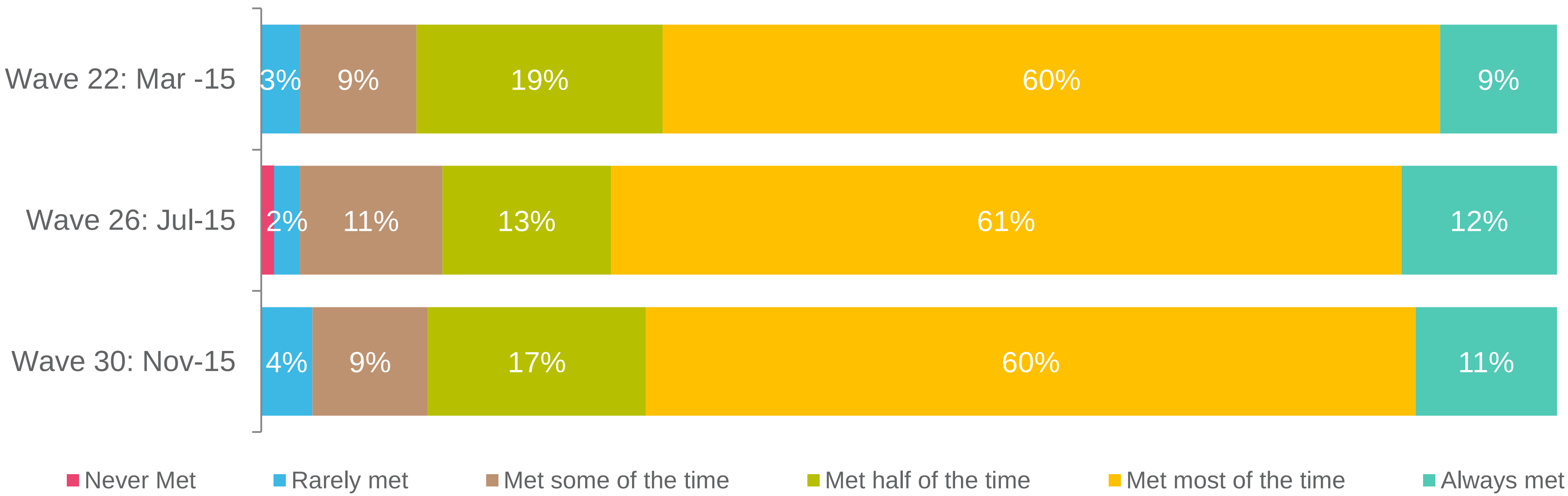
These expectations are being met most of the time, which is consistent with previous waves.

Expected to stay fresh for **7.7** days

▼ 7.1 days, Wave 22

— 7.7 days, Wave 26

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 22 N=314, Wave 26 N=312, Wave 30 N=304

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colmar brunton.

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

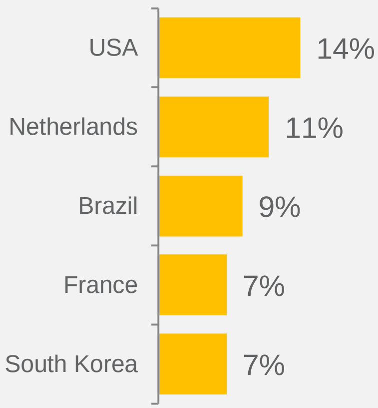
Lettuce Product Launch Trends.

Lettuce Global Launches

September – November 2015

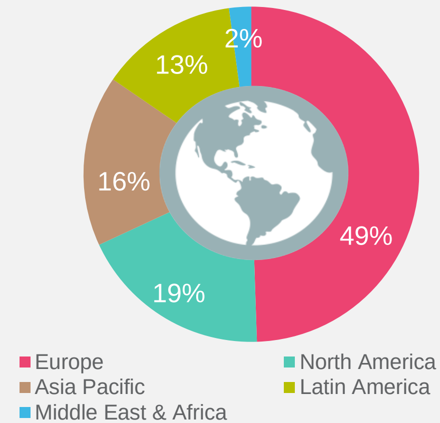
There were 188 products launched globally over the last three months that contained lettuce as an ingredient. The main regions for launches were Europe and North America. Product launches were primarily meals and fruit & vegetables.

Country

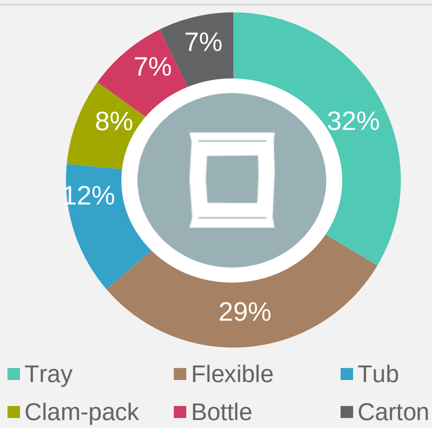


188 Global NPDs

Region



Top Pack Formats



Categories

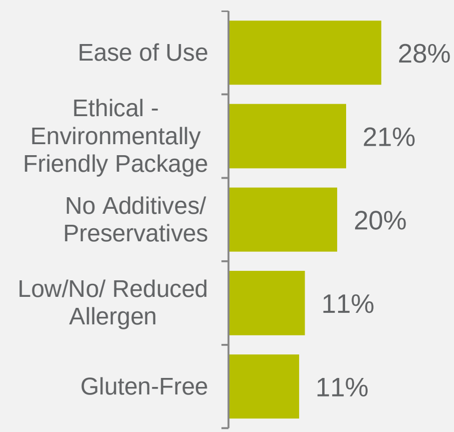
Meals 59%

Fruit & Vegetables 23%

Juice Drinks 13%

Snacks 2%

Top Claims



Lettuce Product Launches:

Last 3 Months (September – November 2015)

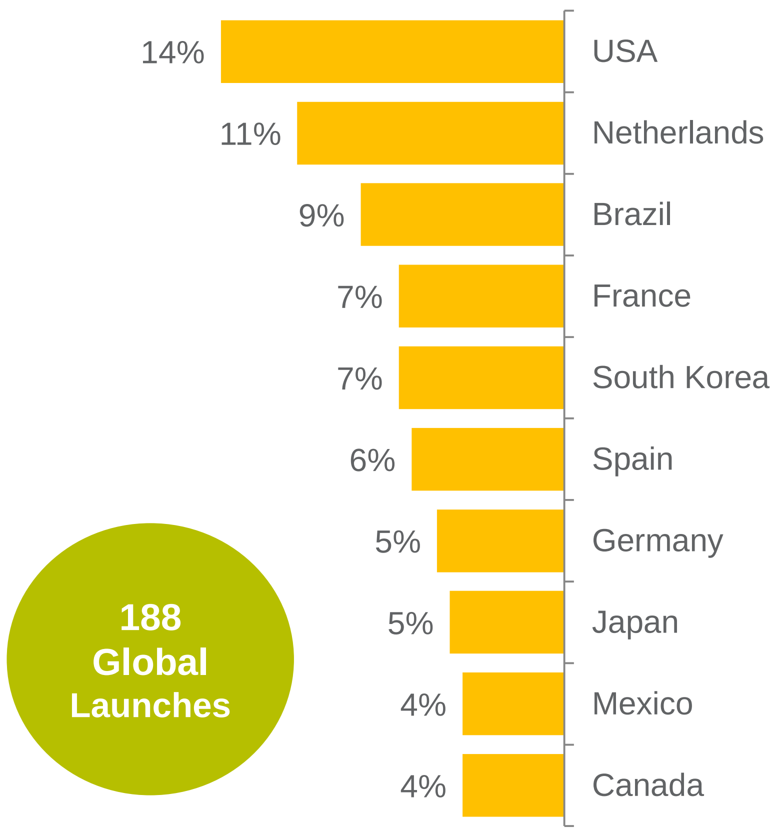
Summary

- Globally, there were 188 products launched, consistent with the previous wave.
- There was only 1 product containing lettuce as an ingredient launched in Australia over the last 3 months.
- The majority of products were launched in Europe (49%) and North America (19%).
- Trays (32%) and flexible formats (29%) were the main packaging formats used.
- The top categories for launches were meals (59%), fruit and vegetables (23%) and juice drinks (13%), which was consistent with previous trends.
- The key claims used over the past three months were ease of use (28%), environmentally friendly packaging (21%) and no additives and preservatives (20%).
- The most innovative launch found was a microwaveable hamburger in South Korea. Examples can be found over the next slides.

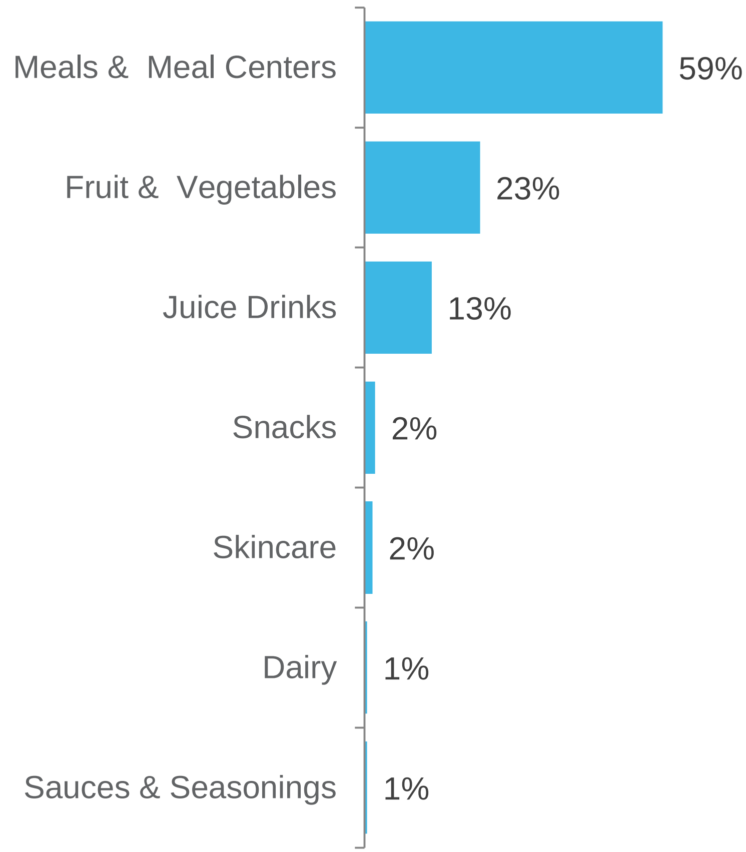
Source: Mintel (2015)

The main countries for products launched were USA and Netherlands. Consistent with previous trends, launches were in meals, fruit and vegetables and juice categories.

Top Launch Countries



Top Launch Categories



Top claims used included ease of use and ethical & environmentally friendly packaging. This was consistent with Europe, the region with the most launches in the last three months. Trays and flexible packs were the most commonly used formats.

Pack Formats Used

Global	Tray	31%
Global	Flexible	29%
Global	Tub	12%
Europe	Tray	49%
Europe	Flexible	30%
Europe	Tub	11%
North America	Flexible	23%
North America	Tray	23%
North America	Bottle	20%

Top Claims Used

Global	Ease of Use	25%
Global	No Additives/Preservatives	20%
Global	Ethical - Environmentally Friendly Package	17%
Europe	Ease of Use	37%
Europe	Ethical - Environmentally Friendly Package	26%
Europe	No Additives/Preservatives	15%
North America	Ethical - Environmentally Friendly Package	20%
North America	No Additives/Preservatives	17%
North America	Kosher	17%

Only regions with n >30 are displayed

Innovative Lettuce Launches:
L3M (September – November 2015)

Herdez 8 Original Vegetable Juice (Mexico)

Herdez 8 Jugo de Verduras Original (Original Vegetable Juice) has been repackaged. This product is free from preservatives, enriched with vitamin A that may contribute to strengthen bones, and vitamin C, which is an antioxidant that may reduce premature ageing. It retails in a 335ml can that features the Saber Nutrir and ESR logos.

Claims:
Beauty Benefits, No Additives/Preservatives, Vitamin/Mineral Fortified, Ethical - Environmentally Friendly Product, Ethical - Charity, Antioxidant, Bone Health

FamilyMart Crabstick Salad with Creamy Roasted Sesame Dressing (Philippines)

FamilyMart Crabstick Salad with Creamy Roasted Sesame Dressing is now available. The salad comprises Romaine lettuce, green and red coral lettuce, sliced cucumber, corn kernels, cherry tomatoes, crabstick shreds with creamy roasted sesame dressing. The product retails in a plastic tub.

Claims:
N/A

Slim Diary Cocoa and Hazelnut Flavoured Fruit and Vegetable Fiber Bar (Germany)

Slim Diary Cocoa and Hazelnut Flavoured Fruit and Vegetable Fiber Bar is QS certified. This product retails in a 30g pack featuring a QR code, and was on display at the Anuga 2015 Trade Show in Cologne, Germany.

Claims:
Slimming

7-Eleven Fresh To Go Garden Salad (USA)

7-Eleven Fresh To Go Garden Salad comprises lettuce, cabbage, cucumbers and carrots. The product retails in a 5-oz. pack.

Claims:
N/A

Source: Mintel (2015)

Innovative Lettuce Launches:
L3M (September – November 2015)

Sand Farm Garlic New York Burger (South Korea)

Sand Farm Garlic New York Burger is made with hamburger steak, garlic dipping sauce and garlic. This microwaveable product is ready in 30 seconds and retails in a 200g pack bearing the HACCP logo.

Claims:
Time/Speed, Microwaveable

Lucky Fish Yoko Sushi Set (Poland)

Lucky Fish Zestaw Sushi Yoko (Yoko Sushi Set) is now available. The ready to eat product features a spicy chilli sauce, contains sugar and sweeteners, and retails in a 390g pack containing three nigiri units, three futomaki units, six hosomaki units, two uramaki units, 15ml of soy sauce, 50ml of flavouring sauce, marinated ginger, wasabi, and chopsticks. The packaging features a QR code.

Claims:
Ease of Use

Skinfood Premium Lettuce & Cucumber Watery Essence (China)

Skinfood Premium Lettuce & Cucumber Watery Essence contains 20% of lettuce and cucumber extracts and 30% of cucumber water. This product retails in a 50ml pack. Also available in this range is Watery Cream (50g/130.00CNY), which contains 20% of lettuce and cucumber extracts, and 30% of cucumber water.

Claims:
Botanical/Herbal

Mesterbakeren Caesar Salad with Chicken & Bacon (Norway)

Mesterbakeren Cæsarsalat med Kylling & Bacon (Caesar Salad with Chicken & Bacon) is a ready-to-eat salad with shredded romaine lettuce topped with chicken fillet, crunchy fried bacon, parmesan, cherry tomatoes and red onions. It is handmade with fresh ingredients and said to be perfect for enjoying something fresh and tasty on-the-go. The product retails in a recyclable 201g pack including a sachet of genuine Caesar dressing, a sachet of croutons and a fork.

Claims:
Ease of Use, Ethical - Environmentally Friendly Package, On-the-Go

Source: Mintel (2015)

Innovative Lettuce Launches:
L3M (September – November 2015)

AH Groene Salade Greek Mix with Vinaigrette (Netherlands)

AH Groene Salade Griekse Mix met Vinaigrette (Greek Mix with Vinaigrette) is now available. The gluten free product retails in a 350g pack containing a 50g sachet of white cheese and a 50g cup of olive oil and vinegar vinaigrette.

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

Auchan Pause Snack Les Salades Shaker Chicken, Pasta & Lettuce Salad Kit (France)

Auchan Pause Snack Les Salades Shaker Salade & Pâtes Poulet (Chicken, Pasta & Lettuce Salad Kit) is now available. The product comprises pasta, tomatoes, mixed salad leaves, mozzarella and roast chicken together with a pot of balsamic vinegar vinaigrette and a plastic fork. It retails in a partly recyclable 230g pack that serves one.

Claims:
Ethical - Environmentally Friendly Package

Open Nature Greek Chopped Salad with Feta Vinaigrette (USA)

Open Nature Greek Chopped Salad with Feta Vinaigrette includes iceberg and romaine lettuces, grape tomatoes, feta cheese, cucumbers and red onions. The salad contains 190 calories per container and is free of artificial flavors, colors, preservatives and artificial ingredients. This product retails in a 7-oz. pack including a fork.

Claims:
No Additives/Preservatives, All Natural Product

Evolution Fresh Cold-Pressed Essential Green with Lime (USA)

Evolution Fresh Cold-Pressed Essential Green with Lime is made using celery, spinach, romaine, kale, lime and parsley. This product is described as a high pressure processed vegetable and fruit juice blend. The non-GMO project verified and kosher certified product retails in a 32-fl. oz. bottle.

Claims:
Kosher, GMO-Free

Source: Mintel (2015)

Australian Lettuce Launches:
L3M (September – November 2015)

Spiral Foods Spicy Wasabi Chips

Spiral Foods Spicy Wasabi Chips are said to be a blend of fresh sliced vegetables and wild horseradish root; wasabi, that are quickly fried and centrifuge spun to reduce fat.This light crisp chips retail in a 60g pack.

Claims:
Low/No/Reduced Fat

Source: Mintel (2015)

Sweet Corn.

Whilst average purchase occasions have increased this wave, average consumption has declined.

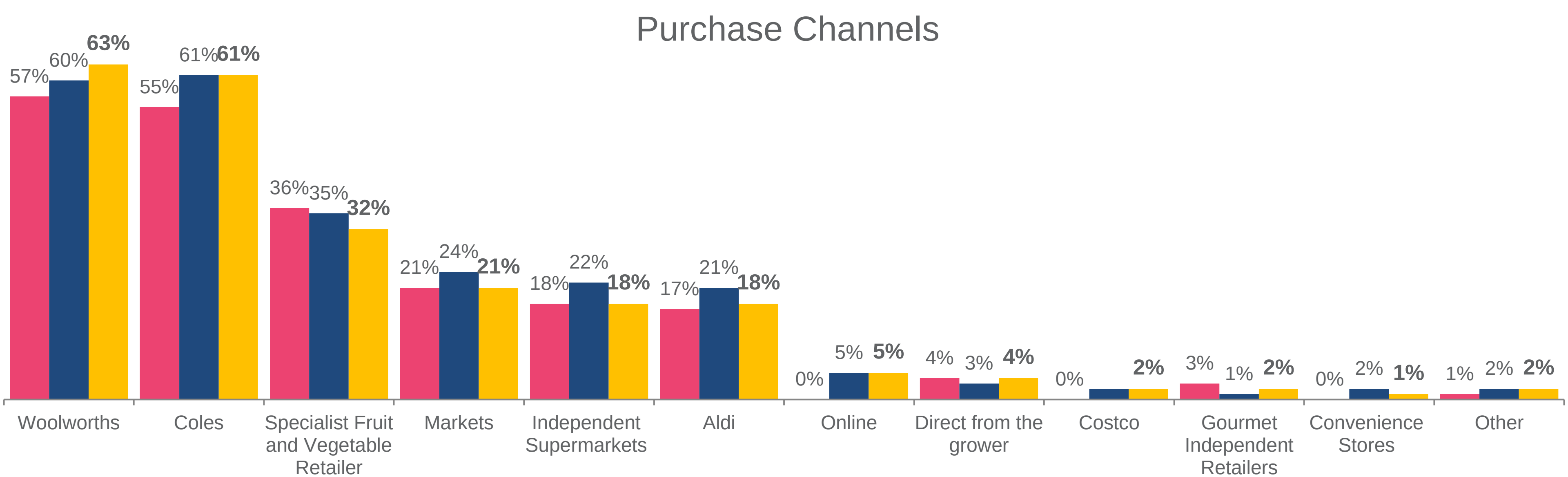
Purchase remains primarily through Coles and Woolworths. This month sees a slight downwards trends in specialist vegetable retailers as a popular purchase channel.

Average Purchase **4.0** times per month

▼ 3.3 times, Wave 22
▼ 3.8 times, Wave 26

Average Consumption **6.1** times per month

▲ 6.2 times, Wave 22
▲ 6.8 times, Wave 26



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 22 N=311, Wave 26 N=304, Wave 30 N=302

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

Average Spend and Price Sensitivity.

Average weight of purchase

The typical consumer purchases **0.9kg** of sweet corn, which has returned to the average weight recorded in Wave 22.

— 0.9kg, Wave 22
▲ 1.1kg, Wave 26

Recalled last spend

Recalled last spend on sweet corn was **$4.20,** which has continued to rise since Wave 22.

▼ $3.70, Wave 22
▼ $4.10, Wave 26

Value for money

Consumers' perceived value for money was good **(6.7/10)**, which is consistent with the previous wave.

▼ 6.6/10, Wave 22
— 6.7/10, Wave 26

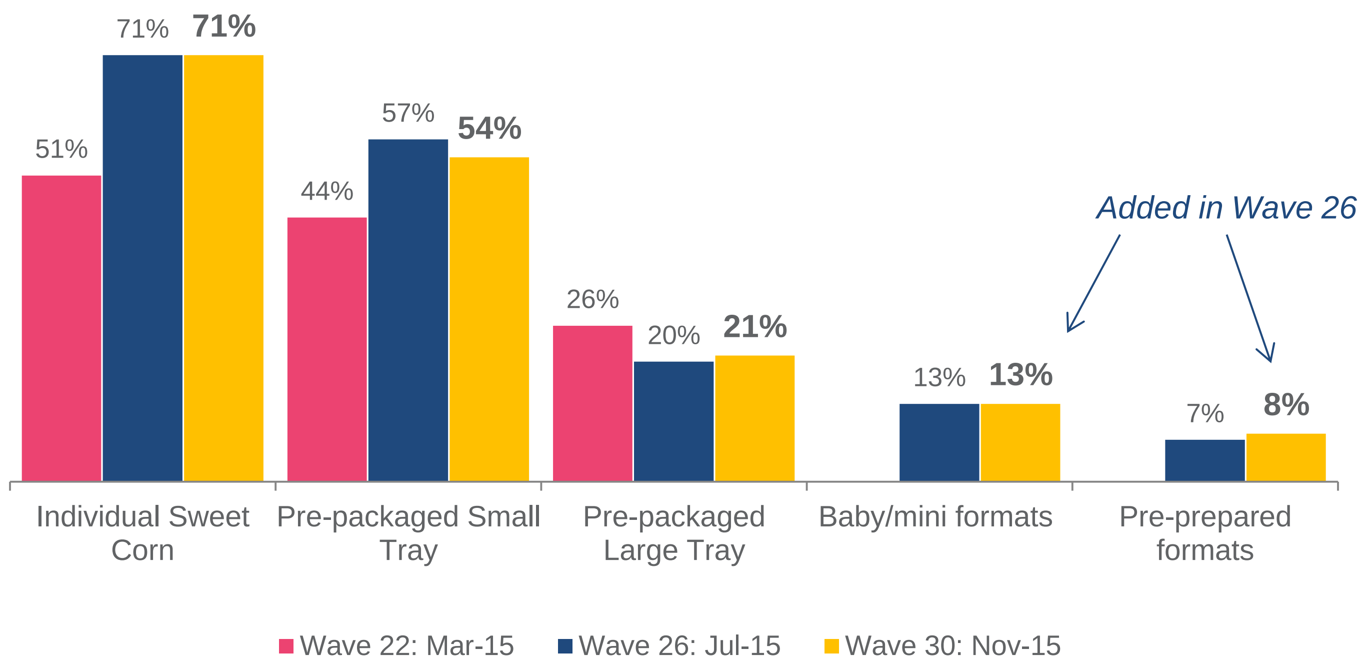
Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is?
Sample Wave 22 N=311, Wave 26 N=304, Wave 30 N=302

Horticulture Innovation Australia

colmar brunton.

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

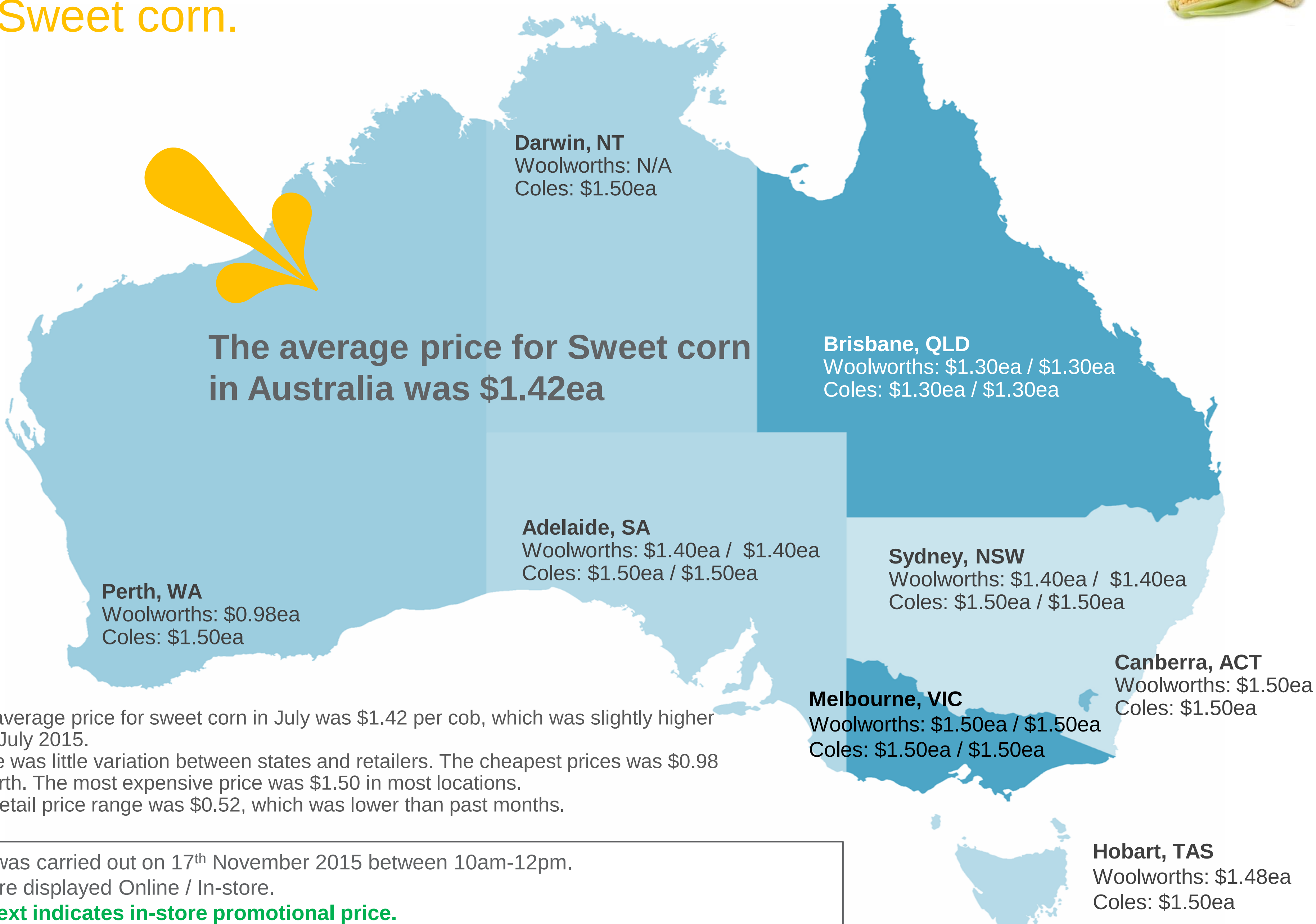
Individual cobs and small trays of corn remain the most common formats purchased. Pre-packaged large trays are also a popular format.



Q4b In what fresh formats do you typically purchase Sweet Corn?
Sample Wave 22 N=311, Wave 26 N=304, Wave 30 N=302

Online and In-store Commodity Prices.

Sweet corn.

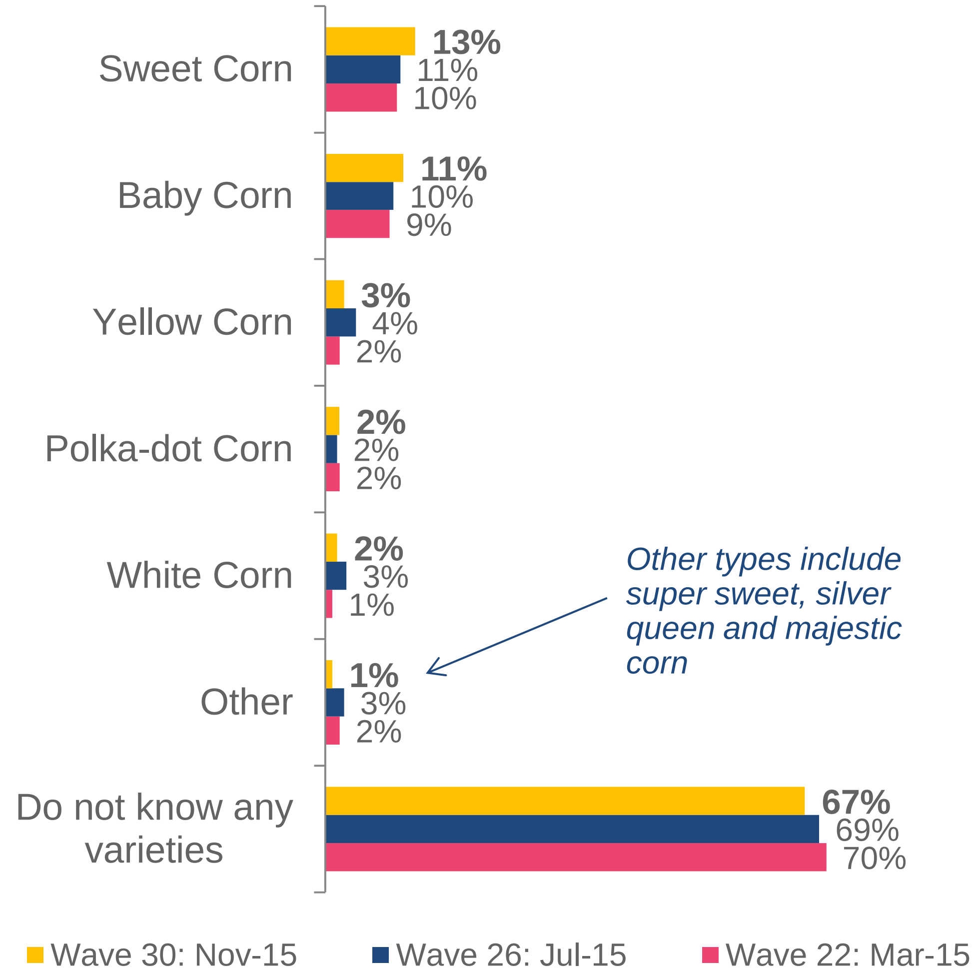


- The average price for sweet corn in July was $1.42 per cob, which was slightly higher than July 2015.
- There was little variation between states and retailers. The cheapest prices was $0.98 in Perth. The most expensive price was $1.50 in most locations.
- The retail price range was $0.52, which was lower than past months.

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

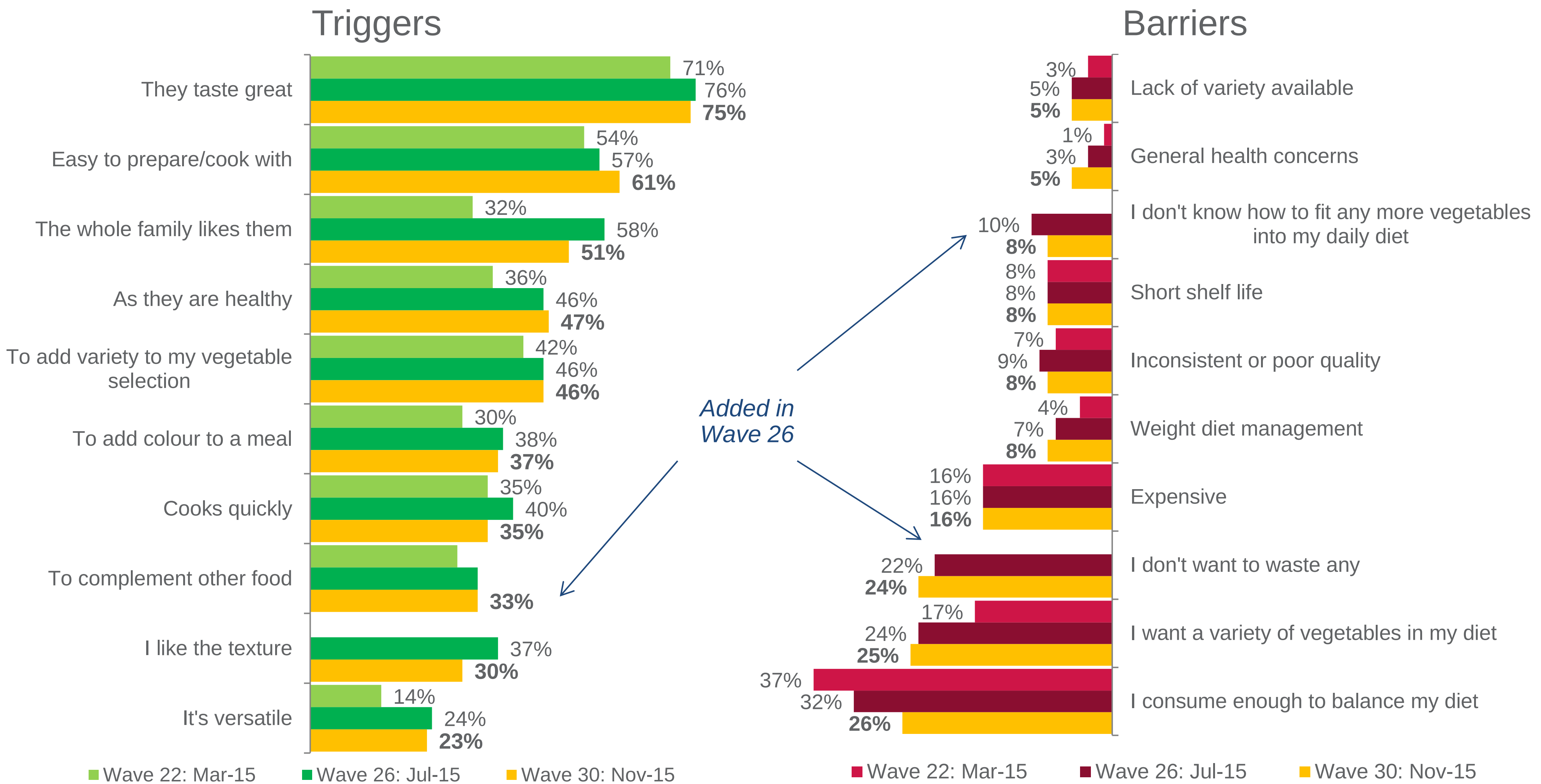
Awareness of sweet corn remains very low, with only one third of consumers able to recall a type.

Sweet corn in general remains the most recalled type.



Q6a. What varieties of <commodity> are you aware of? (unprompted)
Sample Wave 22 N=311, Wave 26 N=304, Wave 30 N=302

The key triggers to purchasing sweet corn are taste and ease of preparation. Key barriers for consumers include already consuming enough and wanting a variety of vegetables in their diet.



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 22 N=311, Wave 26 N=304, Wave 30 N=302

Australian cuisine continues to be most utilised for sweet corn meals.

Dinner and family meals remain the main meal occasions for corn. Additionally, there has been an increasing trend of sweet corn being consumed when cooking a new recipe.

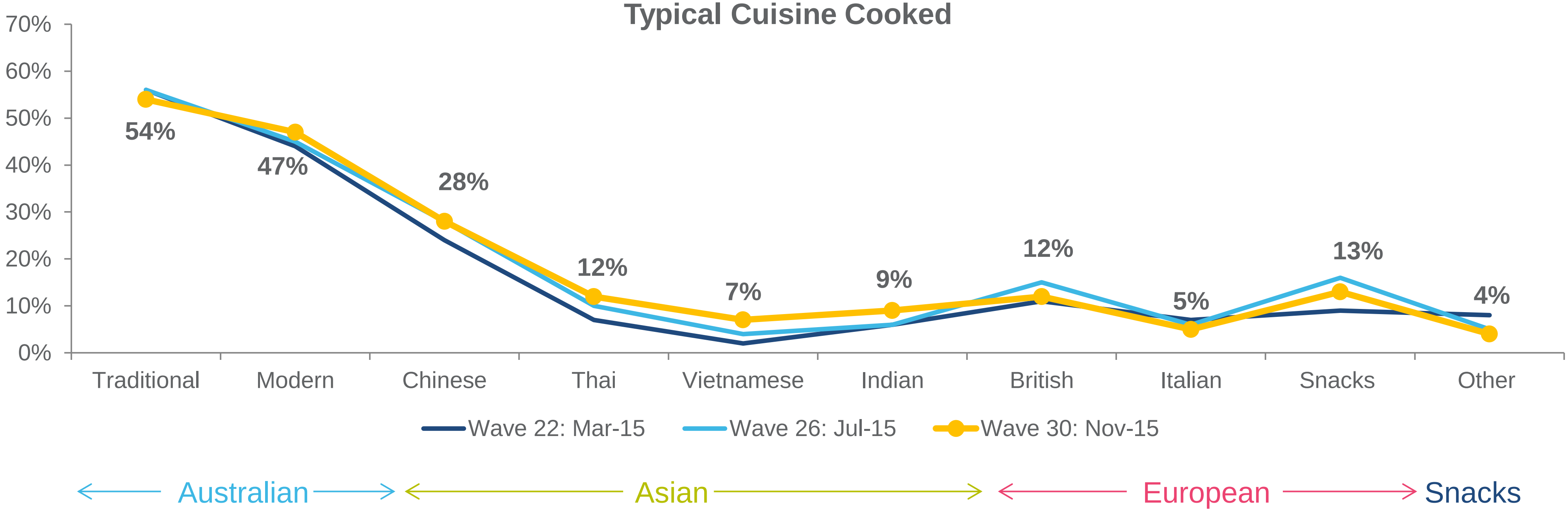
Top 5 Consumption Occasions

	Wave 26	Wave 30
Dinner	71%	**66%**
Family Meals	61%	**58%**
Weekday Meals	43%	**42%**
Quick Meals	40%	**39%**
Weekend Meals	39%	**35%**

14% used sweet corn when cooking a new recipe

▼ 8%, Wave 22
▼ 13%, Wave 26

Typical Cuisine Cooked



Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?
Sample Wave 22 N=311, Wave 26 N=304, Wave 30 N=302

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

On trend with previous waves, consumers prefer to boil, steam and microwave sweet corn. There is an increasing trend of grilling sweet corn. Carrots, potatoes and broccoli are regularly served as accompanying vegetables.

Accompanying Vegetables

Carrot	62%
Potatoes	60%
Broccoli	44%
Beans	37%
Green Peas	32%

Top 10 Cooking Styles

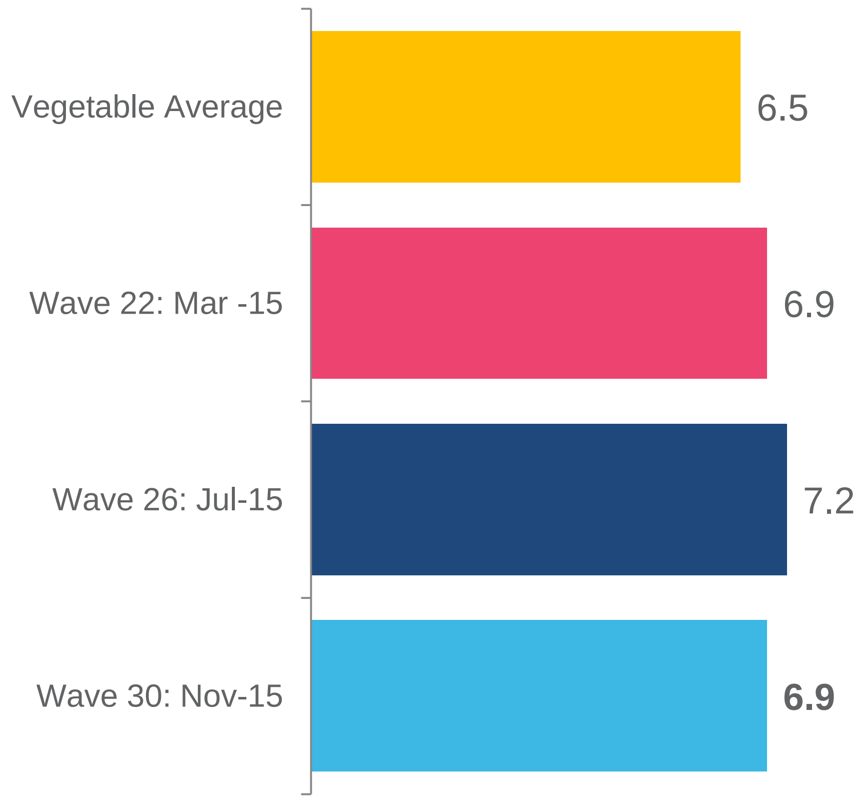
	Wave 22	Wave 26	Wave 30
Boiling	57%	54%	**58%**
Steaming	40%	46%	**46%**
Microwave	26%	31%	**25%**
Stir frying	13%	24%	**25%**
Soup	14%	20%	**18%**
Grilling	10%	14%	**17%**
Roasting	13%	14%	**12%**
Raw	7%	6%	**9%**
Baking	7%	8%	**8%**
Frying	0%	5%	**6%**

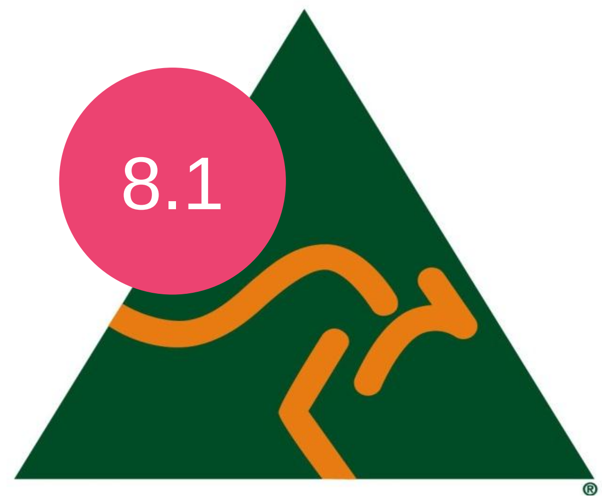
Q9. How do you typically cook <commodity>?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
Sample Wave 22 N=311, Wave 26 N=304, Wave 30 N=302

Horticulture Innovation Australia

colmar brunton.

There has been a slight decrease in importance of provenance this wave. However, consumers still perceive that knowing that their sweet corn is grown in Australia is highly important information.



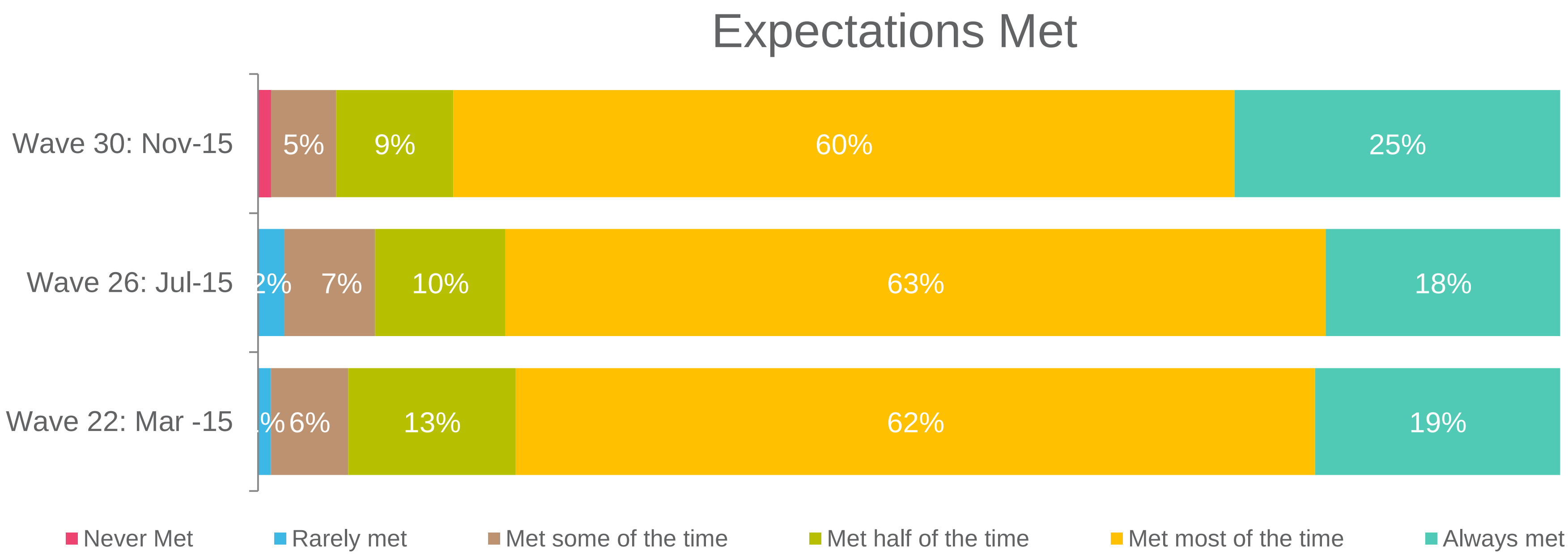


Q14. When purchasing <commodity>, how important is Provenance to you?
Q15. And when purchasing Sweet Corn, how important is that it is grown in Australia?
Sample Wave 22 N=311, Wave 26 N=304, Wave 30 N=302

Sweet corn is expected to stay fresh for just over a week, consistent with previous waves. This wave saw a noticeable increase in consumers' expectations of freshness always being met.

Expected to stay fresh for **7.8** days

▼ 7.7 days, Wave 22
▲ 8.0 days, Wave 26



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 22 N=311, Wave 26 N=304, Wave 30 N=302

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

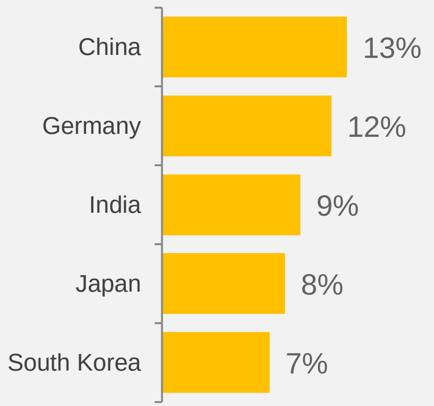
Sweet Corn Product Launch Trends.

Sweet Corn Global Launches

September – November 2015

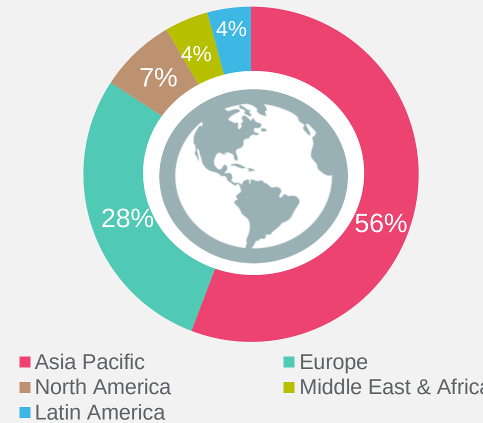
There were 95 sweet corn products launched globally over the last three months. The countries with the most launches were China and Germany. Key categories for launches were meals, and fruit & vegetables. Flexible packaging was most popularly utilised.

Country

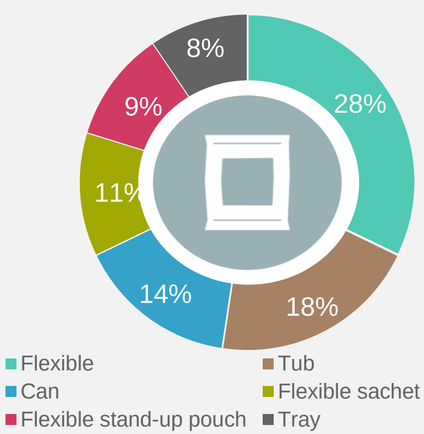


95 Global NPDs

Region



Top Pack Formats



Categories

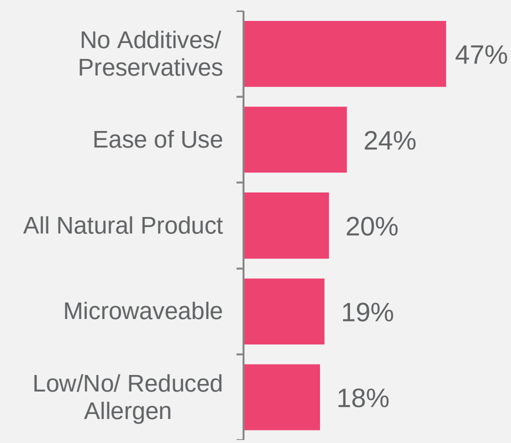
Meals 36%

Fruit & Vegetables 24%

Snacks 15%

Soup 11%

Top Claims

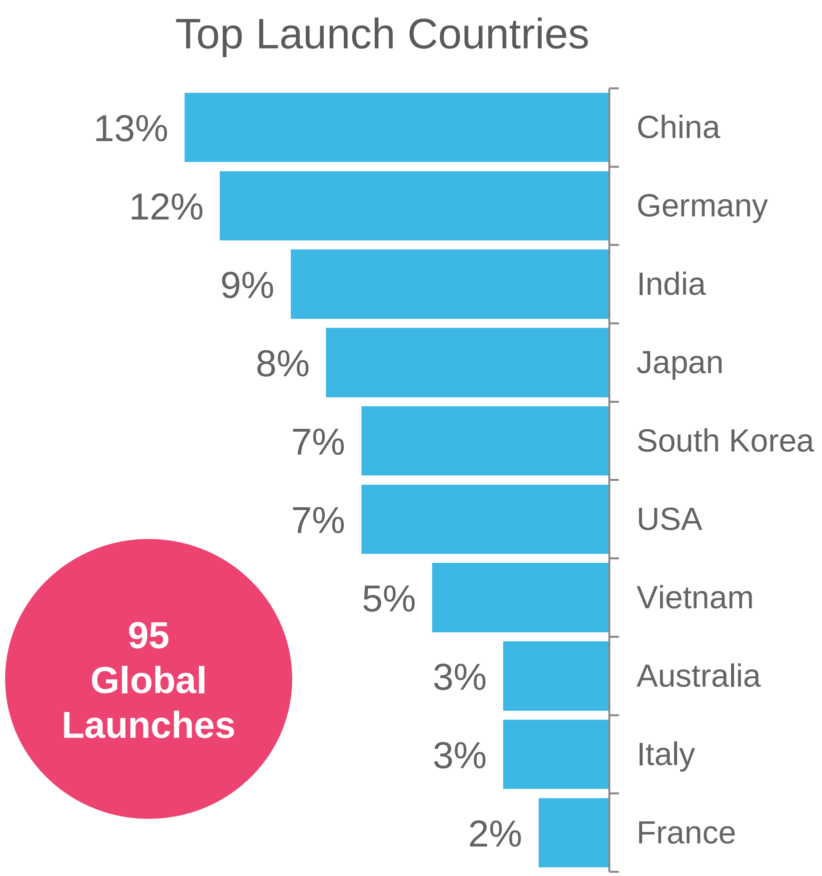


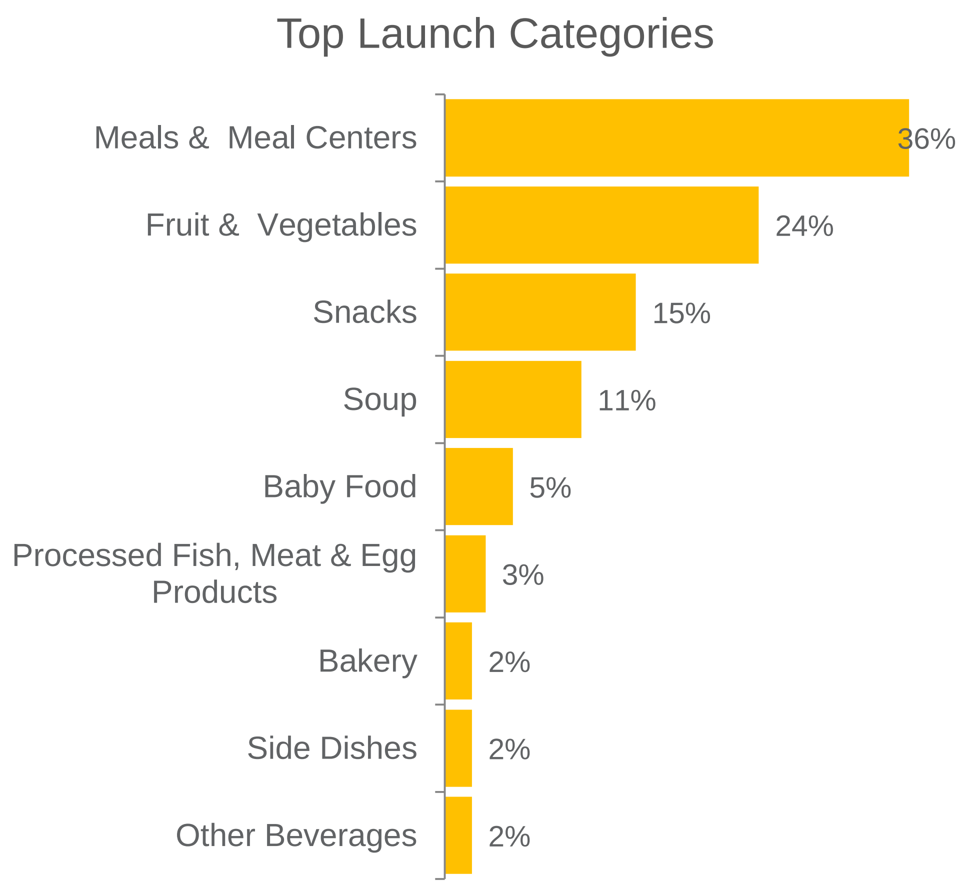
Sweet Corn Product Launches:
Last 3 Months (September – November 2015)
Summary

- There were 95 product launches in the past 3 months globally that contained sweet corn as an ingredient, slightly higher than the previous wave.
- There were 3 products launched in Australia over the past three months.
- Asia Pacific (56%) and Europe (28%) were the key regions for launches.
- Flexible packaging (28%) remained the most common format used for products.
- The main categories for launches were meals (36%), fruits & vegetables (24%) and snacks (15%).
- Claims used on products included no additives/preservatives (47%) and ease of use (24%).
- The most innovative product launched were Spicy Corn Nuggets in India. Other examples can be found in the following pages.

Source: Mintel (2015)

China and Germany were the countries that had the most launches. The key categories for sweet corn launches were meals, fruit & vegetables and soups.





The main claims globally were no additives & preservatives, ease of use and microwaveable. This was consistent in Asia Pacific. Flexible packaging is primarily used for sweet corn products. Whereas, the most popular pack format used in Europe were tub formats.

Pack Formats Used

Global	Flexible	28%
Global	Tub	15%
Global	Can	14%
Asia Pacific	Flexible	40%
Asia Pacific	Flexible Sachet	17%
Asia Pacific	Flexible Stand-Up Pouch	11%

Top Claims Used

Global	No Additives/Preservatives	47%
Global	Ease of Use	23%
Global	Microwaveable	15%
Asia Pacific	No Additives/Preservatives	51%
Asia Pacific	Ease of Use	23%
Asia Pacific	Microwaveable	21%

Only regions with n >30 are displayed

Innovative Sweet Corn Launches:
L3M (September – November 2015)

Supa Corn Sweet Corn on the Cob (India)

Supa Corn Sweet Corn on the Cob has been repackaged with a new look. Carefully cultivated in fertile farms, it is processed and packaged with Oxy Fresh technology to stay 100% natural without any preservatives. The premium product is ready to eat, microwaveable, free from added flavours and colours, suitable for vegetarians, and retails in a single-unit pack.

Claims:
No Additives/Preservatives, All Natural Product, Microwaveable, Ease of Use, Vegetarian, Premium

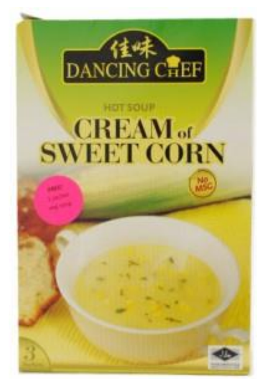
Heinz Beef, Tomato and Corn Paste (China)

Heinz Niu Rou Fan Qie Yu Mi Ni (Beef, Tomato and Corn Paste) has been repackaged, and now retails in a newly designed 113g pack. This paste is made using imported corn from USA and processed according to a 2mm filtering technique to make the paste finer. This microwaveable is free from preservatives and specially designed for babies between seven and 36 months old.

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

Dancing Chef Cream of Sweet Corn Hot Soup (Myanmar)

Dancing Chef Cream of Sweet Corn Hot Soup is now available. The halal certified product is free from preservatives and MSG. The easy-to-prepare soup can be prepared quickly at home or at work any time of the day. It retails in a 54g pack containing 3 x 18g sachets including one sachet free, and featuring preparation steps.



Claims:
Halal, No Additives/Preservatives, On-the-Go, Time/Speed, Ease of Use

McCain Vegetable Burgers (South Africa)

McCain Vegetable Burgers have been repackaged with a new design. These chunky and crispy bread-coated burgers are made with only the finest ingredients and are filled with a mix of tender vegetable pieces and potato. The halal certified product can be cooked in three minutes retails in a 450g pack, which is sufficient for six servings.

Claims:
Halal, Time/Speed

Source: Mintel (2015)

Innovative Sweet Corn Launches:
L3M (September – November 2015)

Bugles Magic Chargrilled Flavoured Corn Snack (China)

Bugles Mo Li Tan Shao Wei Yu Mi Jiao (Magic Chargrilled Flavoured Corn Snack) has been relaunched and repackaged with an upgrade formula. The snack is made using selected top quality juicy sunshine sweetcorn and processed according to a modern technique to add real sweetcorn juice to the snack. It is free from artificial colourings, and claimed to be healthy and delicious. This product retails in a 65g pack featuring a WeChat QR code.

Claims:
No Additives/Preservatives, Social Media

AFC Dinh Duong Corn Flavoured Wholegrain Nutrition Crackers (Vietnam)

AFC Dinh Duong Banh Cracker Vi Bap Ngu Coc Nguyen Hat (Corn Flavoured Wholegrain Nutrition Crackers) have been relaunched under a new brand name, previously known as AFC, and now come in a newly designed 316g pack containing 16 x 19.8g packets. The ready-to-eat product is made from nutritious wholegrain oat, wheat, and potato which are said to be good for general health.

Claims:
Beauty Benefits, Other (Functional), On-the-Go, Slimming, Ease of Use, Wholegrain, Digestive (Functional), Bone Health

Tohato Tsunagaring Sweetcorn Ring Snack (Japan)

Tohato Tsunagaring Sweetcorn Ring Snack is said to have aromatic and sweet flavour. It retails in a 58g pack with QR code. Launched on September 21, 2015, open-priced.

Claims:
N/A

Western Farmfresh Spicy Corn Nuggets (India)

Western Farmfresh Spicy Corn Nuggets are individually quick frozen and 100% natural with no preservatives. The product is suitable for vegetarians and retails in a 300g pack.

Claims:
No Additives/Preservatives, All Natural Product, Vegetarian

Source: Mintel (2015)

Innovative Sweet Corn Launches:
L3M (September – November 2015)

House Tongari Corn Whole Soybean Soy Sauce Flavour Grilled Corn Corn Snack (Japan)

House Tongari Corn Whole Soybean Soy Sauce Flavour Grilled Corn Corn Snack features crunchy texture and aromatic flavour. The product now retails in a new 80g pack. Launched on July 6, 2015 open-priced.

Claims:
Seasonal, GMO-Free, Wholegrain

Win 2 Crisp Maker Sweet Corn Flavoured Puffed Corn (Vietnam)

Win 2 Crisp Maker Banh Puffed Corn (Sweet Corn Flavoured Puffed Corn) is now available. The halal certified product is suitable for vegetarians, and is ready to eat. It retails in a 50g pack.

Claims:
Halal, Ease of Use, Vegetarian

Daiichi Pan Pikachu Corn Bread (Japan)

Daiichi Pan Pikachu Corn Bread is a savoury bread filled with corn and mayonnaise. The product retails in a pack that includes a reusable sticker. Launched on August 1st 2015, open-priced.

Claims:
Cobranded, Microwaveable

Roggenkamp Organics Hot Pot Vegan Edition Mexico Chili without Carne (Germany)

Roggenkamp Organics Hot Pot Vegan Edition Mexico Chili ohne Carne (Mexico Chili without Carne) is a stew with vegetables and meat substitutes all in one pot. The microwaveable, organic product retails in a 260ml pack featuring the EU Green Leaf and Vegan logos.

Claims:
Organic, Vegan, No Animal Ingredients, Microwaveable

Source: Mintel (2015)

Australian Sweet Corn Launches:
L3M (September – November 2015)

La Gina La Zuppa Chicken and Vegetable with Rice Soup

La Gina La Zuppa Chicken and Vegetable with Rice Soup is made with the finest and freshest ingredients to a traditional recipe and is described as a hearty chicken and vegetable soup with wholegrain brown rice. This all natural product just needs water added, is 99% fat free, and free from gluten and dairy. It is said to be a healthy and convenient alternative for making soup at home, and retails in a 2 x 100g pack.

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

Woolworths Select Oriental Soy & Vegetables Flavoured Rice

Woolworths Select Oriental Soy & Vegetables Flavoured Rice has been repackaged. The product contains no artificial colours, flavours or added MSG. This microwavable product can be ready in 10 minutes and retails in a 120g pack that serves four.

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

La Gina La Zuppa Kale, Quinoa & Vegetable Soup

La Gina La Zuppa Kale, Quinoa & Vegetable Soup is described as a nutritious combination of kale, quinoa, lentils and vegetables. This all natural, gluten- and dairy-free, microwavable product is said to contain the finest ingredients. is 99% fat free and retails in a 540g pack.

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

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Source: Mintel (2015)


Green Peas.

There has been an increase in purchase frequency of green peas, with consumption also rising this wave.

Green peas are generally purchased from mainstream retailers, with specialist vegetable retailers growing in popularity over the last three waves.

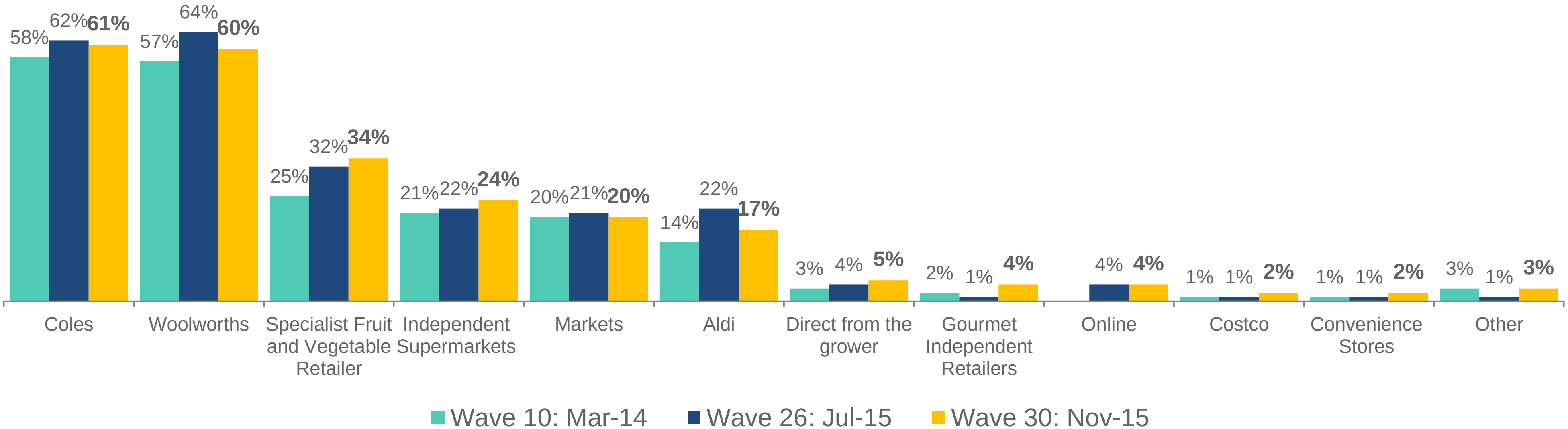
Average Purchase **4.7** times per month

▼ 3.9 times, Wave 10
▼ 4.5 times, Wave 26

Average Consumption **10.6** times per month

▼ 10.2 times, Wave 10
▼ 10.1 times, Wave 26

Purchase Channels



Q1. On average, how often do you purchase green peas?
Q2. On average, how often do you consume green peas?
Q5. From which of the following channels do you typically purchase green peas?
Sample Wave 10 N=311, Wave 26 N=309, Wave 30 N=306

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

Average Spend and Price Sensitivity.

Average weight of purchase

The average consumer typically purchases **700g** of green peas, consistent with the previous wave.

▲ 800g, Wave 10
— 700g, Wave 26

Recalled last spend

Recalled last spend on green peas is **$4.20**, relatively consistent with previous waves.

▲ $4.45, Wave 10
▲ $4.30, Wave 26

Value for money

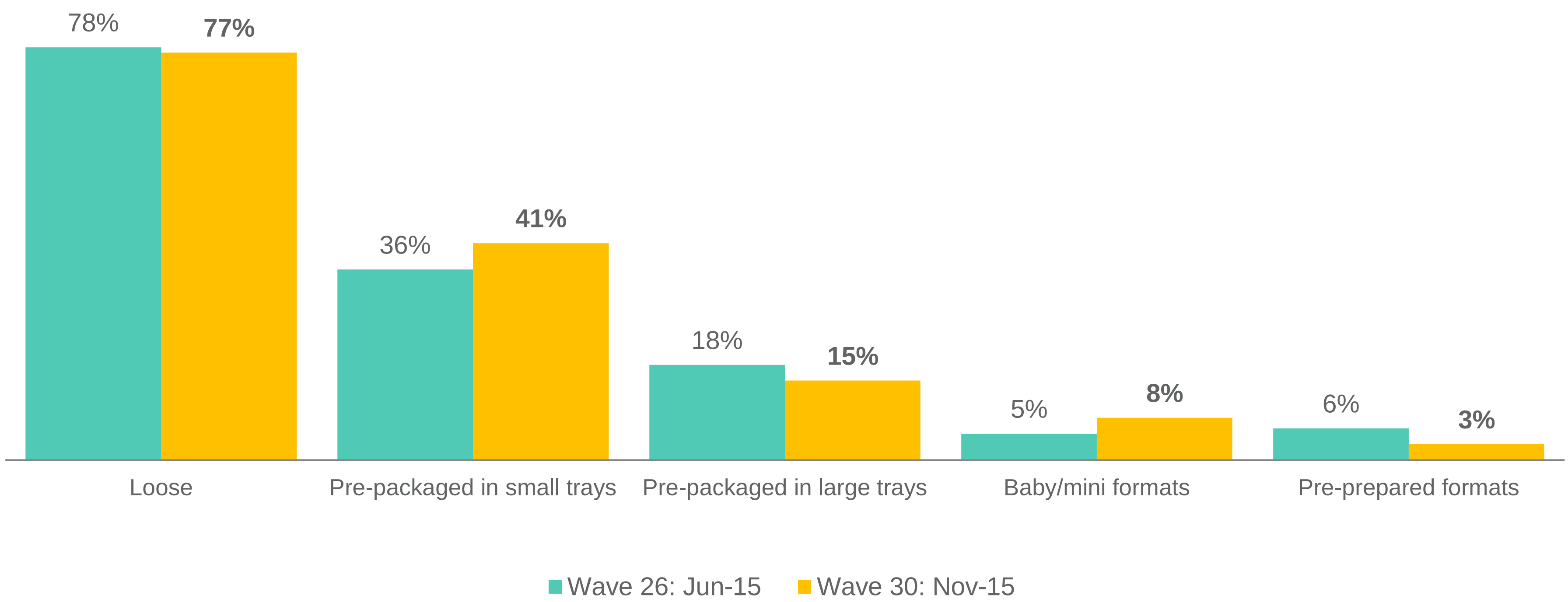
Consumers' perceived value for money is fair for green peas **(6.3/10)**, remaining stable from the previous wave.

▼ 6.2/10, Wave 10
— 6.3/10, Wave 26

Q3. How much leek 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 10 N=311, Wave 26 N=309, Wave 30 N=306

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

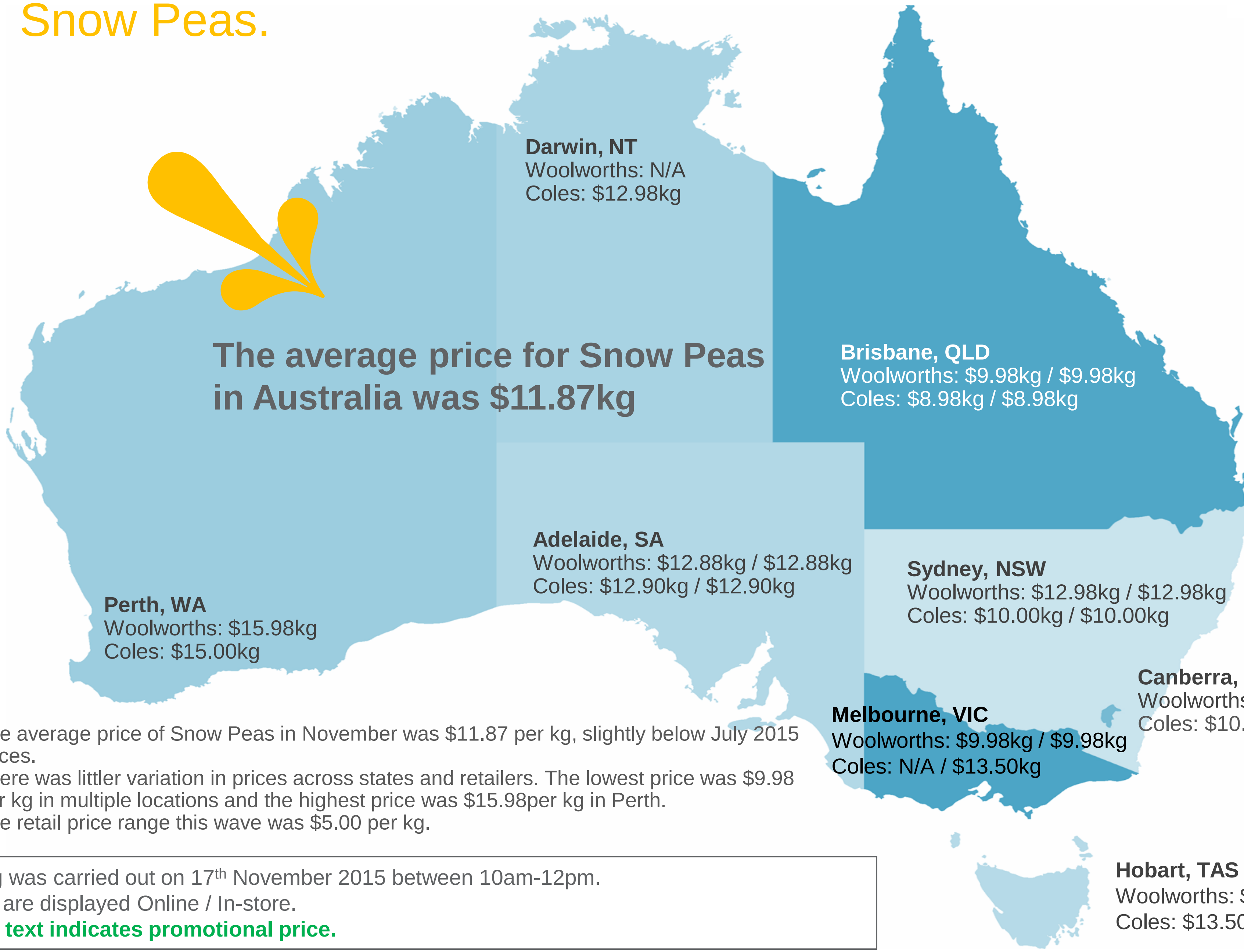
Individual green peas are the most common purchase format. This wave sees an increase in purchase of pre-packaged formats in small trays.



Q4b. In what fresh formats do you typically purchase green peas?
Sample Wave 10 N=311, Wave 26 N=309, Wave 30 N=306

Online and In-store Commodity Prices.

Snow Peas.

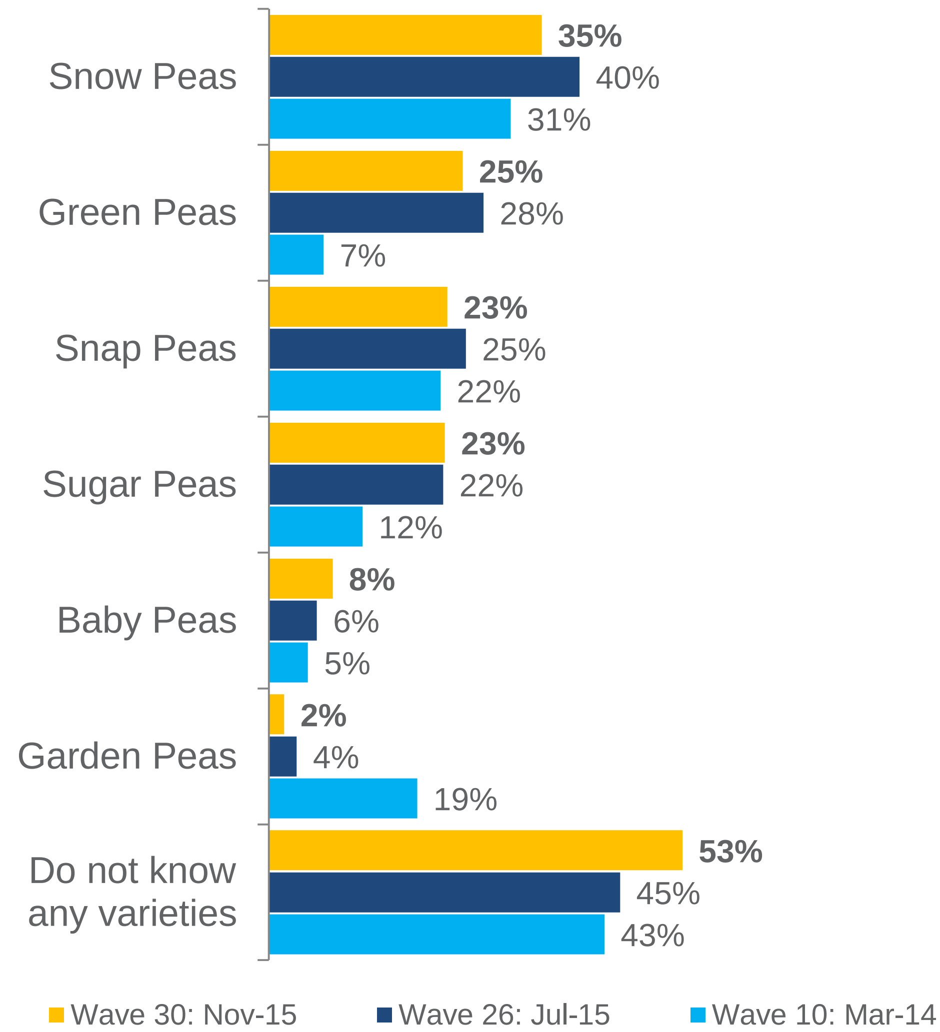


- The average price of Snow Peas in November was $11.87 per kg, slightly below July 2015 prices.
- There was littler variation in prices across states and retailers. The lowest price was $9.98 per kg in multiple locations and the highest price was $15.98per kg in Perth.
- The retail price range this wave was $5.00 per kg.

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

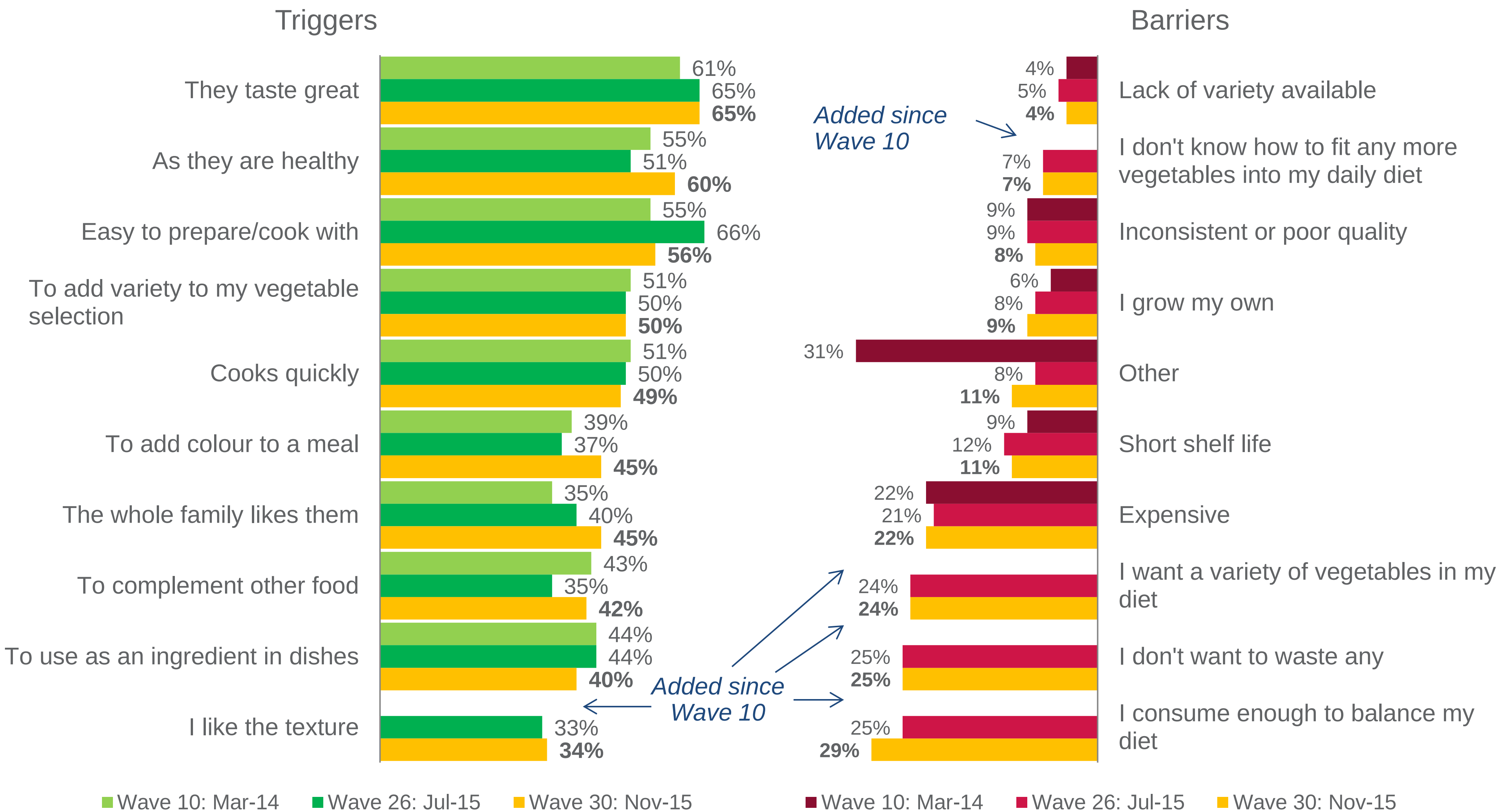
Snow Peas and Green Peas are the most commonly recalled varieties.

Half of consumers are still unable to recall a type of pea.



Q6a. What types/varieties of <commodity> are you aware of? (unprompted)
Sample Wave 6 N=339, Wave 10 N=311, Wave 26 N=309

Taste, health and ease of preparation are the key drivers of purchase. In contrast, the key barriers to purchase are already consuming enough, not wanting to waste any and wanting a variety of vegetables in their diet.



Q7. Which of the following reasons best describes why you purchase green peas?
Q8. Which reason best describes why you don't buy green peas more often?
Sample Wave 10 N=311, Wave 26 N=309, Wave 30 N=306

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Green pea dishes are most popular in Australian and Chinese cuisine, with an increasing trend of cooking peas as snacks.

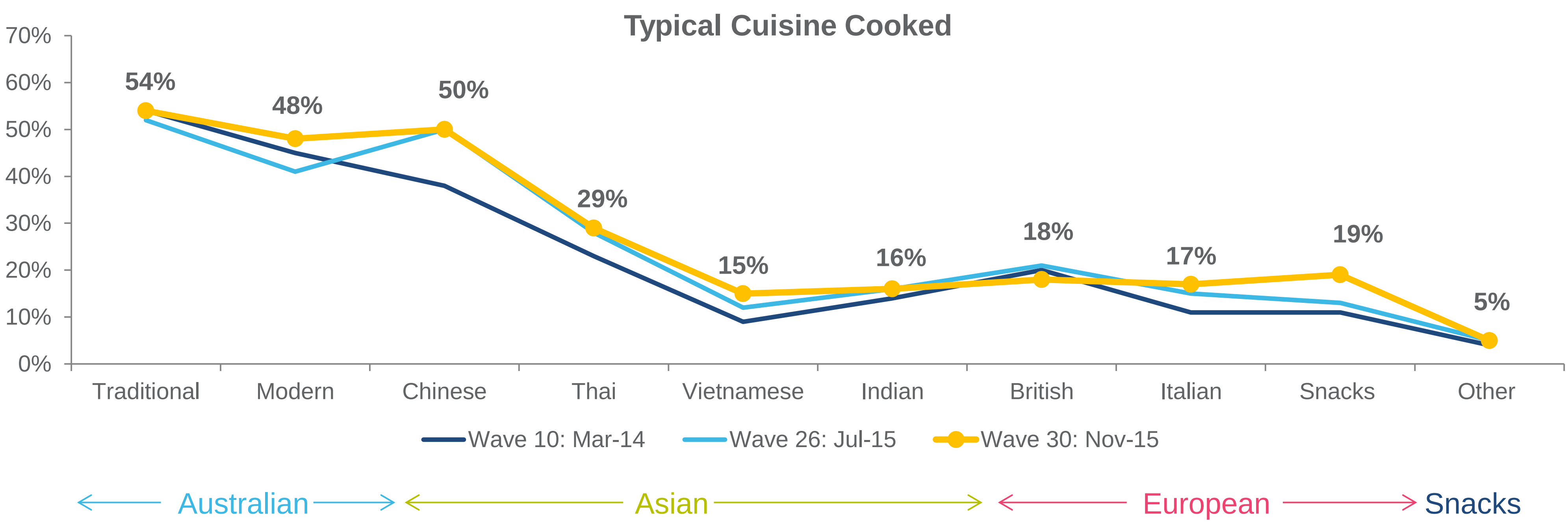
Meal occasions tend to occur during dinner meals.

Top 5 Consumption Occasions

	Wave 26	Wave 30
Dinner	74%	**74%**
Family meals	66%	**64%**
Quick meals	50%	**50%**
Weekday meals	52%	**48%**
Weekend meals	43%	**43%**

19% used green peas when cooking a new recipe

▲ 23%, Wave 26



Q10. What cuisines do you cook/consume that use green peas?
Q11. Which of the following occasions do you typically consume/use green peas?
Sample Wave 10 N=311, Wave 26 N=309, Wave 30 N=306

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

Consumers prefer to serve green peas with carrots and potatoes. Green peas are generally stir fried and steamed, consistent with past waves.

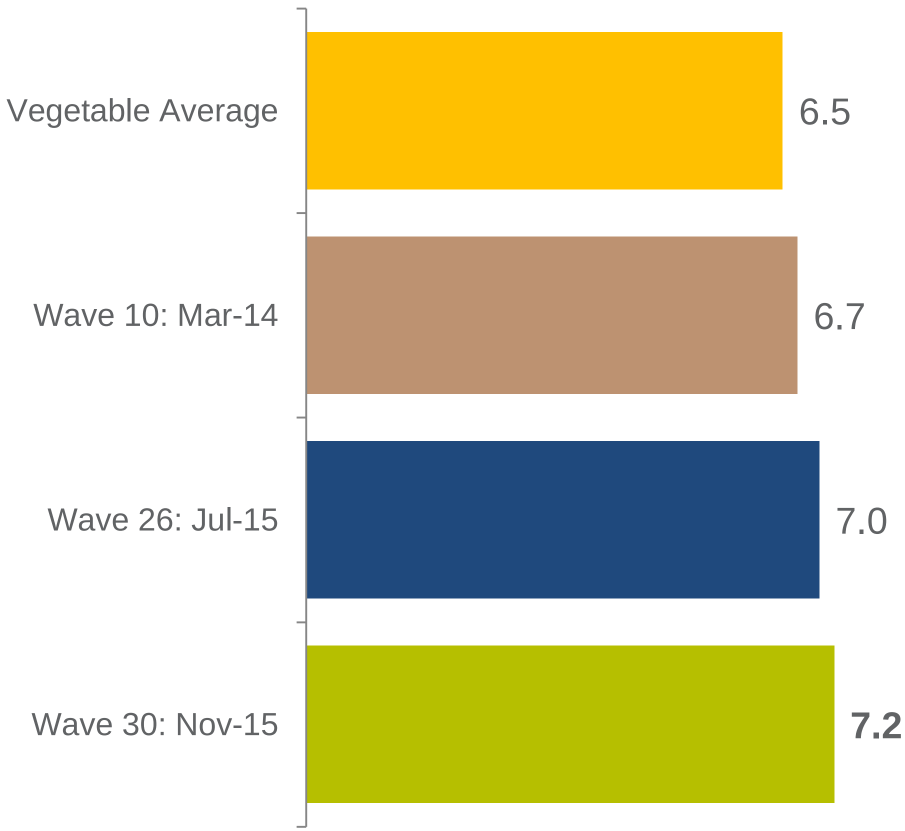
Accompanying Vegetables

Carrot	72%
Potato	51%
Broccoli	37%
Capsicum	36%
Sweet Corn	34%

Top 10 Cooking Styles			
	Wave 10	Wave 26	**Wave 30**
Stir frying	41%	59%	**59%**
Steaming	50%	49%	**54%**
Raw	23%	32%	**40%**
Boiling	37%	42%	**40%**
Microwave	28%	23%	**26%**
Soup	13%	20%	**16%**
Slow Cooking	13%	13%	**13%**
Sautéing	9%	14%	**12%**
Frying	6%	9%	**9%**
Mashing	4%	8%	**5%**

Q9. How do you typically cook green peas?
Q10a. And when are you serving green peas which of the following do you also serve together with this?
Sample Wave 10 N=311, Wave 26 N=309, Wave 30 N=306

Importance of provenance has continued to increase this wave. Knowing that green peas are grown in Australia is the most important provenance information for consumers.



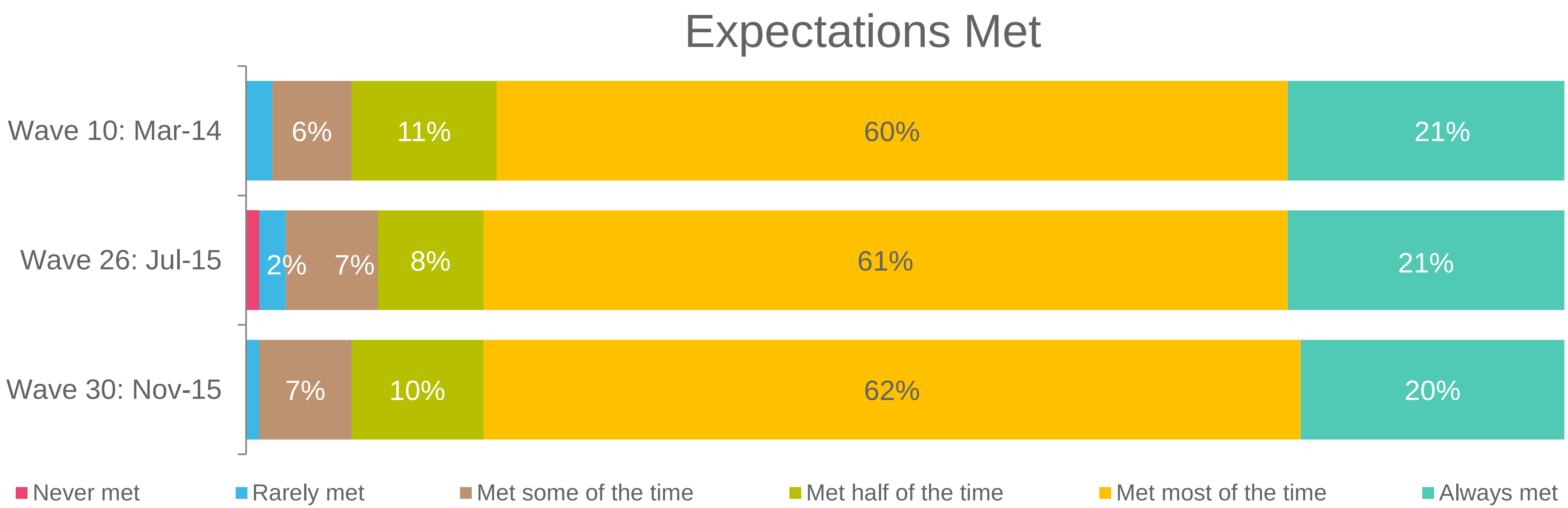
8.1

Q14. When purchasing green peas, how important is Provenance to you?
Q15. And when purchasing green peas, how important is that it is grown in Australia?
Sample Wave 10 N=311, Wave 26 N=309, Wave 30 N=306

Consumers expect green peas to remain fresh for over a week once purchased, continuing the decline since March 2014. This expectation is being met most of the time.

Expected to stay fresh for **8.2** days

▲ 10.0 days, Wave 10
▲ 9.2 days, Wave 26



Q12. How long do you expect green peas to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy green peas?
Sample Wave 10 N=311, Wave 26 N=309, Wave 30 N=306

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

Green Peas Product Launch Trends.

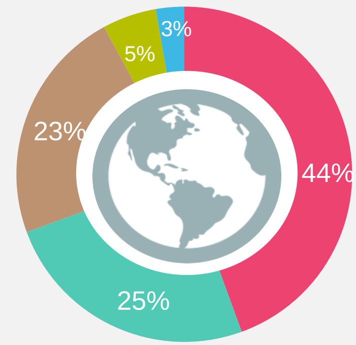
Green Peas Global Launches
September – November 2015

There were 441 green pea products launched globally over the last three months. The majority of launches were in the USA. Categories for launches were snacks and processed products. Key packaging for green pea products was flexible formats.

Country

USA	15%
China	12%
UK	8%
Germany	8%
Canada	8%

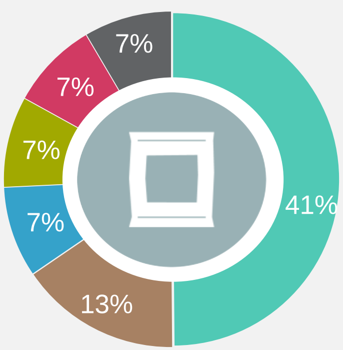
Region



Europe
North America
Middle East & Africa
Asia Pacific
Latin America

441 Global NPDs

Top Pack Formats



Flexible
Bottle
Tub
Tray
Carton
Flexible stand-up pouch

Categories

Snacks 21%

Processed Products 18%

Bakery 12%

Meals 10%

Top Claims

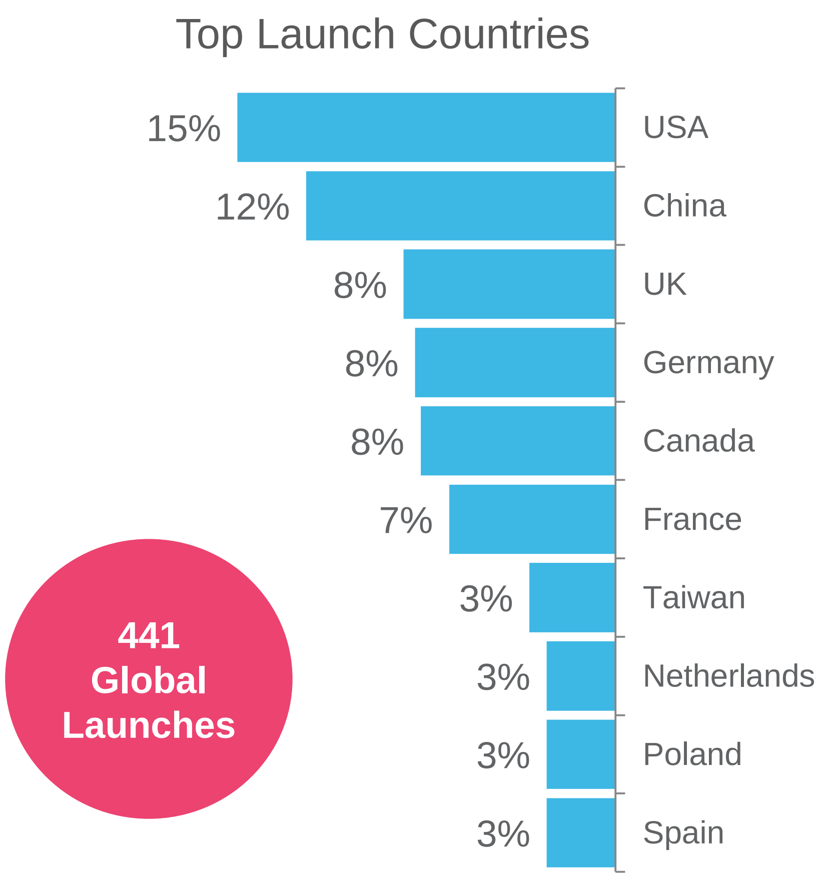
Low/No/Reduced Allergen	33%
Gluten Free	30%
Vegan	24%
No Additives/ cPreservatives	24%
No Animal Ingredients	24%

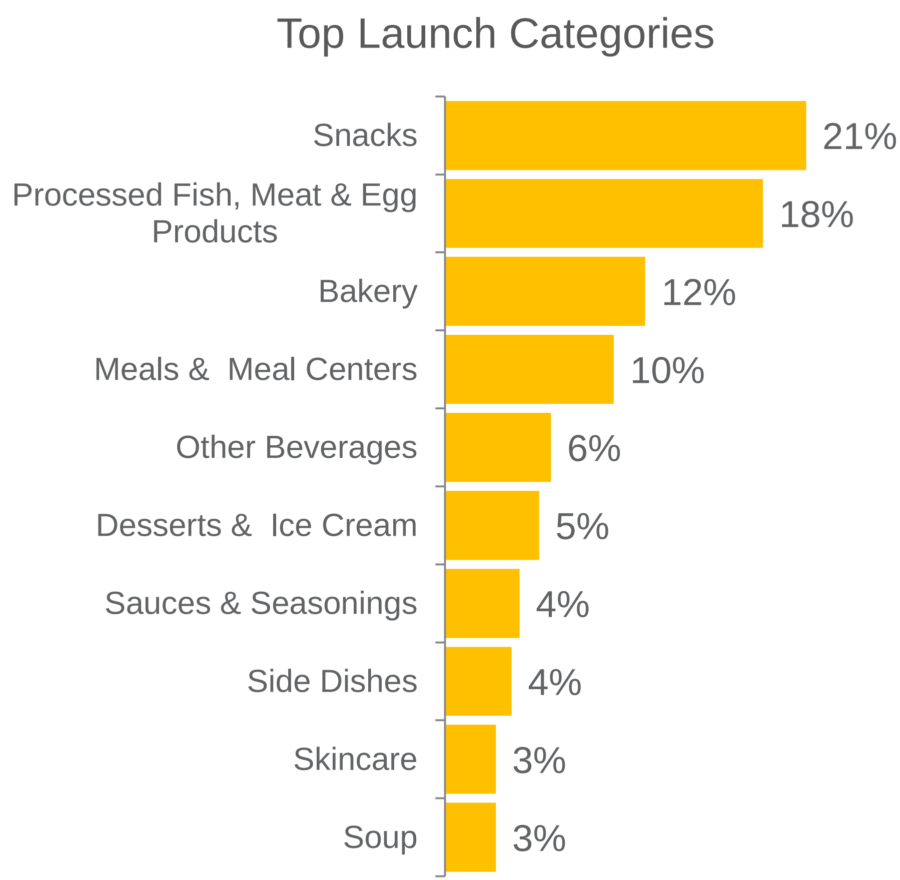
Green Peas Product Launches:
Last 3 Months (September – November 2015)
Summary

- There were 441 launches in the past 3 months globally that contained green peas as an ingredient.
- There were 7 products launched in Australia over the past three months.
- Europe (44%) and Asia Pacific (25%) were the key regions for launches.
- Flexible packaging (41%) was the most common format used for products.
- The main categories for launches were snacks (21%), processed products (18%), and bakery (12%).
- Claims used on products highlighted health; low/no/reduced allergen (33%), gluten free (30%), and vegan (24%).
- The most innovative products launched included a Mixed Cereal Powder for Adults in Taiwan, and Sea Salt Popped Bean Chips in the USA. Examples of these can be found in the following pages.

Source: Mintel (2015)

The majority of launches occurred in USA and China. The key categories for green pea launches are snacks, processed products and baked items, relatively consistent with the previous wave.





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The main claims being utilised included no additives & preservatives, gluten free and vegan. Flexible packaging was primarily used for green pea products, consistent across regions. Trays, and flexible stand-up pouches were also popular formats.

Pack Formats Used

Global	Flexible	41%
Global	Tray	11%
Global	Flexible Stand-Up Pouch	7%
Europe	Flexible	40%
Europe	Tray	24%
Europe	Tub	14%
Asia Pacific	Flexible	45%
Asia Pacific	Bottle	14%
Asia Pacific	Flexible Stand-Up Pouch	11%

Top Claims Used

Global	Low/No/Reduced Allergen	30%
Global	Gluten Free	28%
Global	Vegan	24%
Europe	Low/No/Reduced Allergen	27%
Europe	Gluten Free	23%
Europe	Vegan	19%
Asia Pacific	No Additives/Preservatives	29%
Asia Pacific	Vegan	15%
Asia Pacific	No Animal Ingredients	15%

Only regions with n >30 are displayed

Innovative Green Peas Launches:
L3M (September – November 2015)

Veganz Vegan Wiener Schnitzel (Czech Republic)

Veganz Veganský Vídenský Rízek (Vegan Wiener Schnitzel) is made with soy and wheat proteins. The product can be pan fried in four to five minutes or oven baked to five to six minutes. It retails in a 300g pack featuring the Facebook logo.

Claims:
Vegan, No Animal Ingredients, Social Media

Kalbe Milna Beef & Green Peas Baby Cereal (Malaysia)

Kalbe Milna Bijirin Bayi dengan Cah Daging Kacang Polong (Beef & Green Peas Baby Cereal) is a dry cereal for infants and young children over six months of age. It contains minerals, protein which is important for growth and development, calcium which plays a role in bone formation and maintains bones and teeth density, omega 3 and 6, and carbohydrate. It is high in vitamins A, B12, C and E, iron and zinc and is a source of vitamins B1 and B2.

Claims:
Halal, Other (Functional), Babies & Toddlers (0-4), Children (5-12), Bone Health

MaXsport Veggie Protein Grill Flavoured Wholegrain Crackers (Czech Republic)

MaXsport Veggie Protein Celozrnné Krekry s Príchuti Gril (Grill Flavoured Wholegrain Crackers) provide 20% protein and are high in fibre. This 100% natural product does not contain added sugar, gluten or GMO. The kosher certified crackers are suitable for vegans and retail in a 36g pack sufficient for one serving.

Claims:
All Natural Product, Low/No/Reduced Allergen, GMO-Free, High/Added Fiber, Vegan, Kosher, Low/No/Reduced Sugar, Gluten-Free, No Animal Ingredients, High Protein, Wholegrain

Just Veg! Spicy Vegetarian Cold Cuts (Switzerland)

Just Veg! Aufschnitt Pikant Ohne Fleisch (Spicy Vegetarian Cold Cuts) are made with milk and vegetable proteins, and are said to be a source of protein. The gluten-free product retails in a 125g pack with the European Vegetarian Union ovo-lacto-vegetarian logo.

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

Source: Mintel (2015)

Innovative Green Peas Launches:
L3M (September – November 2015)

Xiang Hui 28 Mixed Cereal Powder for Adult (Taiwan)

Xiang Hui 28 Mixed Cereal Power for Adult is made with 28 types of grains, and can be served with hot water, fresh milk, soy milk, juice or grains. This product retails in a 380g pack.

Claims:
N/A

HarryP. Bodyfit von Seitenbacher Whole Grain Muscle Pasta (Germany)

HarryP. Bodyfit von Seitenbacher Whole Grain Muscle Pasta has been relaunched with a new brand name. It is described as the revolution in protein-rich nutrition and provides 30g protein, 3g BCAAs and 23g net carbs per portion to support the body in building up muscle mass and regeneration. The product has a cooking time of seven to 10 minutes and retails in a 330g pack providing four portions.

Claims:
Weight & Muscle Gain, Wholegrain

Organics Happy Baby Simple Combos Broccoli, Pears & Peas Organic Baby Food (USA)

Organics Happy Baby Simple Combos Broccoli, Pears & Peas Organic Baby Food is now available. The kosher, USDA organic certified product provides 15% daily value of vitamin A, 90% daily value of vitamin C, 3g of fiber, and 135mg of potassium, is unsalted and unsweetened, and free from GMO, artificial flavors, and colors.

Claims:
No Additives/Preservatives, GMO-Free, Kosher, Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Ease of Use, Ethical - Human, Ethical - Charity, Organic, Low/No/Reduced Sodium, Babies & Toddlers (0-4), Low/No/Reduced Sugar, On-the-Go

PopCorners Sea Salt Popped Bean Chips (USA)

PopCorners Sea Salt Popped Bean Chips are now available. The product is gluten free, GMO free, kosher certified and packed with fiber and protein. It is said to have an unbelievable flavor, and to help feeling full throughout the day by satisfying cravings for crunch without the guilt of fried chips. This snack retails in a 6-oz. pack featuring the Facebook logo. The product was on display at the Natural Products Expo East 2015 in Baltimore.

Claims:
Low/No/Reduced Allergen, GMO-Free, High/Added Fiber, Kosher, Gluten-Free, Social Media

Source: Mintel (2015)

Innovative Green Peas Launches:
L3M (September – November 2015)

Peeled Snacks Peas Please Garden Herb Baked Pea Snacks (USA)

Peeled Snacks Peas Please Garden Herb Baked Pea Snacks are now available. The organic and kosher certified product is made with real, simple ingredients such as organic whole peas and wholegrain brown rice, and is gluten and GMO free. It is described as crunchy retails in a 0.77-oz. pack. This product was on display at the Natural Products Expo East 2015 in Baltimore.

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

Sheng-Hsiang-Jen Garlic Flavoured Green Peas (Russia)

Sheng-Hsiang-Jen Garlic Flavoured Green Peas are made in Taiwan and suitable for vegans. This product retails in a 9.4g pack and was on display at the trade show WorldFood Moscow 2015.

Claims:
Vegan, No Animal Ingredients

Popchips Veggie Chips with a Hint of Olive Oil (USA)

Popchips Veggie Chips with a Hint of Olive Oil have been reformulated and are now free from GMOs. These vegan chips have not been fried or baked but air popped, are formulated with a blend of nine vegetables with a touch of sea salt to be light and crispy. They are free from gluten, cholesterol, saturated fat, trans fat, preservatives and artificial flavors and colors. The kosher certified product contains 50% less fat than regular fried potato chips and retails in a 3-oz. pack.

Claims:
No Additives/Preservatives, Low/No/Reduced Allergen, Low/No/Reduced Cholesterol, No Animal Ingredients, Vegan, Kosher, Low/No/Reduced Fat, Low/No/Reduced Saturated Fat, Gluten-Free, Low/No/Reduced Transfat, GMO-Free

Organics Happy Baby Homestyle Meals Sweet Peas, Green Beans, Spinach & Quinoa Organic Baby Food (USA)

Organics Happy Baby Homestyle Meals Sweet Peas, Green Beans, Spinach & Quinoa Organic Baby Food is a stage two food suitable for babies over the age of six months, making eating effortless as it can be served straight from the pouch. The USDA Organic certified product is free of GMOs, contains 4g of fiber and 190% DV vitamin A and retails in a 3.5-oz. BPA-free pack.

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

Source: Mintel (2015)

Australian Green Peas Launches:
L3M (September – November 2015)

Freelicious Organic Amaranth + Protein Crispbread

Freelicious Organic Amaranth + Protein Crispbread is new to the range. This organic certified product is free from gluten, wheat, dairy and peanut, is a source of protein and fibre, low in fat and sugar and contains no added colours, flavours or preservatives. It is said to provide the wholesome goodness of three grains and to be deliciously toasted and crispy.

Claims:
No Additives/Preservatives, Low/No/Reduced Allergen, Organic, Ethical - Environmentally Friendly Package, Low/No/Reduced Fat, Low/No/Reduced Sugar, Gluten-Free, Social Media

Raw C Pure Protein & Cacao Coconut Water

Raw C Pure Protein & Cacao Coconut Water is 100% natural without added colour, preservatives, dairy, or GMO. The product contains 20g protein, and is made from single origin and 100% natural tree-style rawsomeness of coconuts, with pea protein and crushed cacao for nature's ultimate chocolate protein fix. The company proudly supports the OZHarvest. The drink is high in potassium, has five electrolytes, and retails in a 330ml pack featuring the Facebook, Twitter, and Instagram logos.

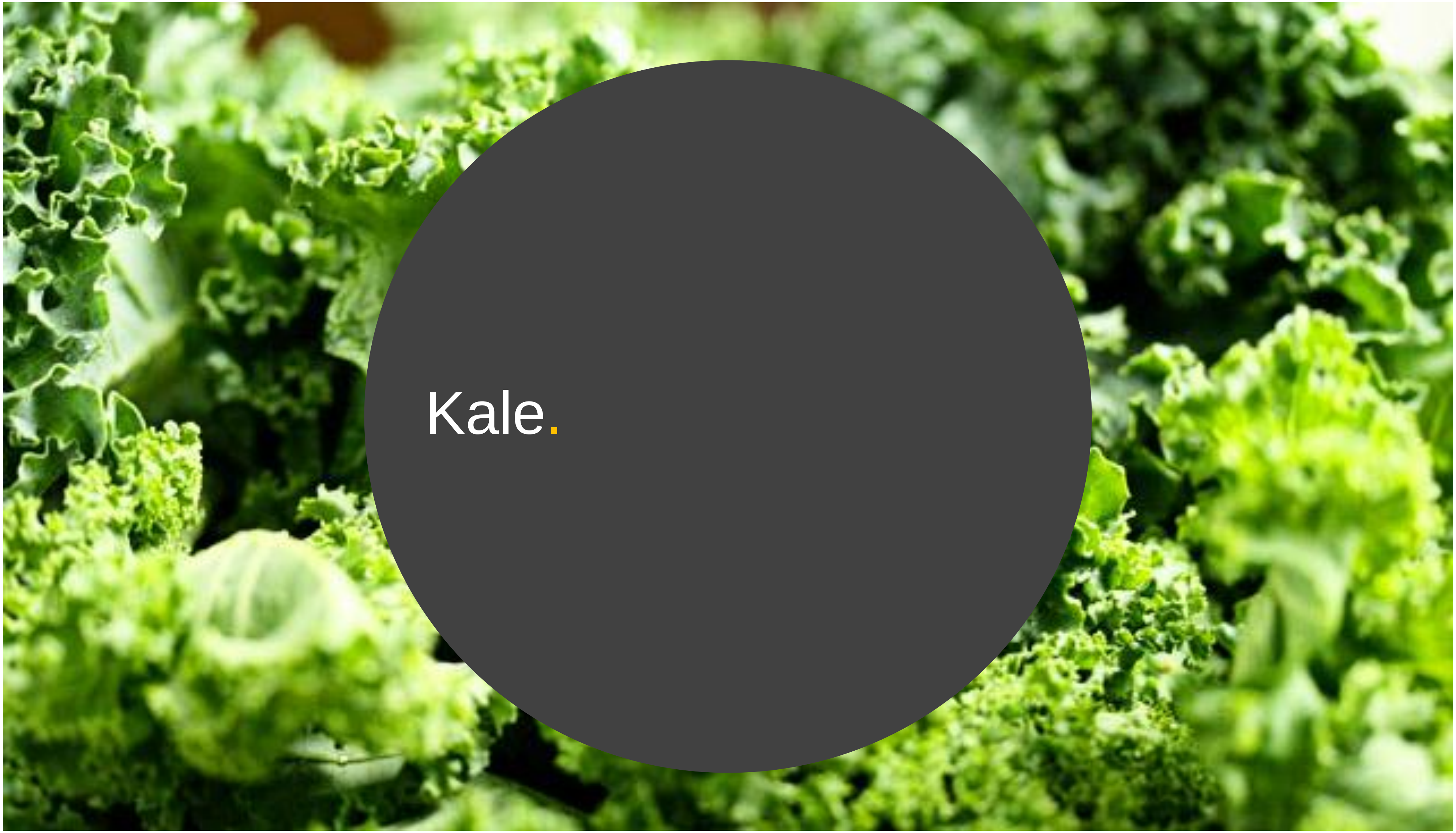
Claims:
No Additives/Preservatives, All Natural Product, GMO-Free, High Protein, Ethical - Charity, Social Media

Nature First Premium Vegie Salt

Nature First Premium Vegie Salt is described as a tasty combination of natural sea salt, herbs, spices and vegetables that can add flavour to a variety of recipes. This product is free from gluten, wheat, free flowing agents or GM ingredients. It retails in a resealable oxygen-barrier 245g pack.

Claims:
No Additives/Preservatives, Low/No/Reduced Allergen, GMO-Free, Gluten-Free, Convenient Packaging, Premium

Source: Mintel (2015)


Kale.

Average purchase and consumption of kale have increased this wave.

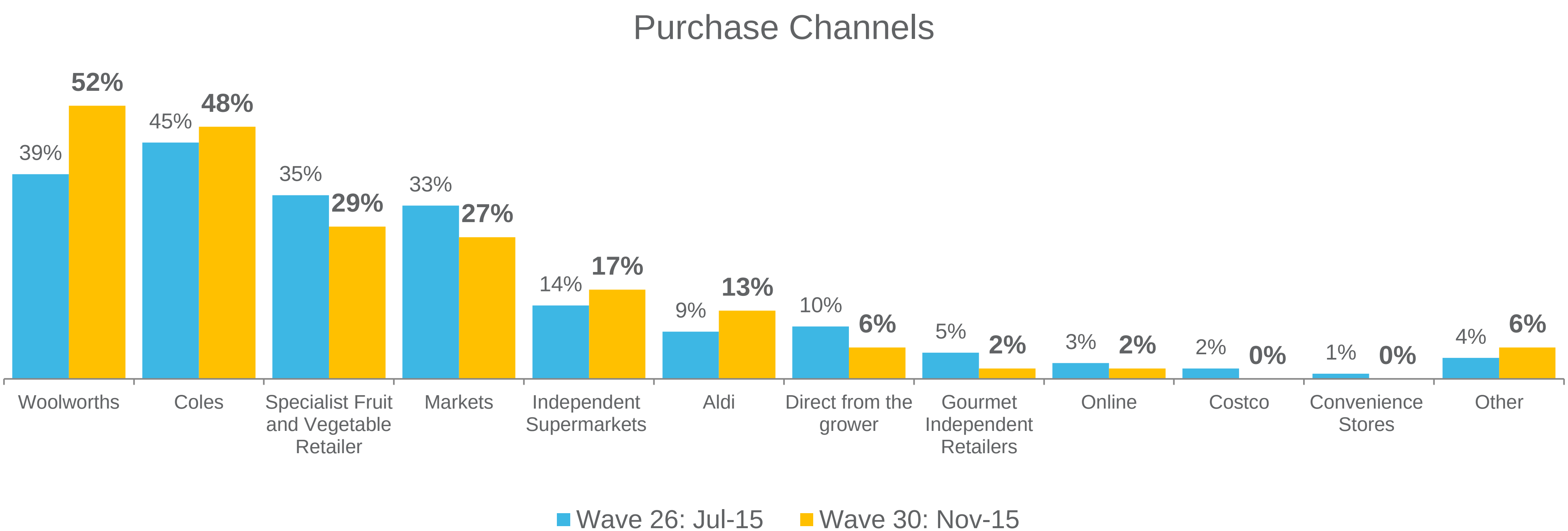
Kale is typically purchased from mainstream retailers. This wave saw a decline in purchase from specialist retailers and markets.

Average Purchase **4.3** times per month

▼ 4.1 times, Wave 26

Average Consumption **9.4** times per month

▼ 8.8 times, Wave 26



Q1. On average, how often do you purchase kale?
Q2. On average, how often do you consume kale?
Q5. From which of the following channels do you typically purchase kale?
Sample Wave 26 N=200, Wave 30, N=205

Horticulture Innovation Australia

colmar brunton.

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

Average Spend and Price Sensitivity.

Average weight of purchase

The average consumer typically purchases **600g** of kale, a slight decline from the previous wave.

▲ 700g, Wave 26

Recalled last spend

Recalled last spend on kale is **$3.80**, declining from the previous wave.

▲ $4.60, Wave 26

Value for money

Consumers perceived kale to be fair value for money **(6.1/10)**, which has decreased this wave.

▲ 6.5/10, Wave 26

Q3. How much kale 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 26 N=200, Wave 30, N=205

Horticulture Innovation Australia

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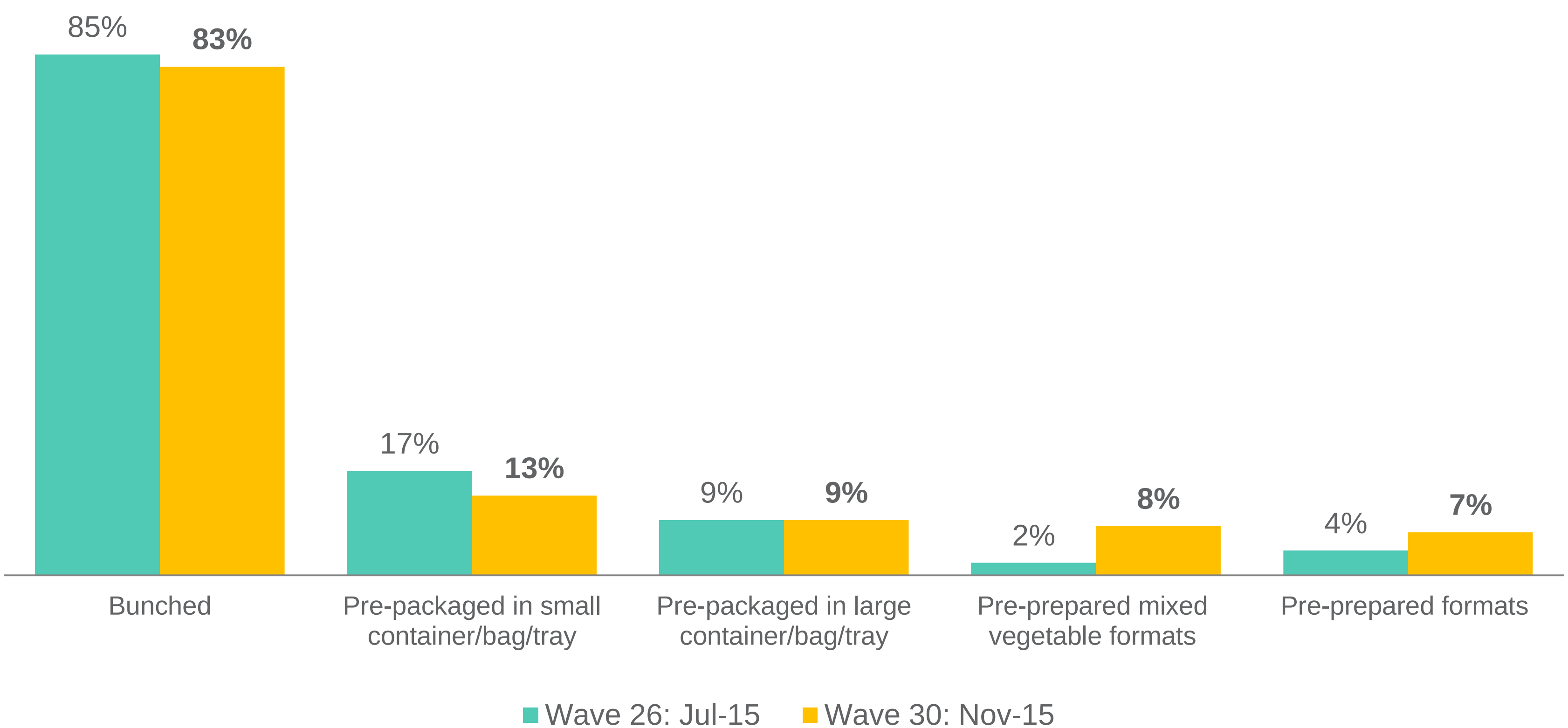
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

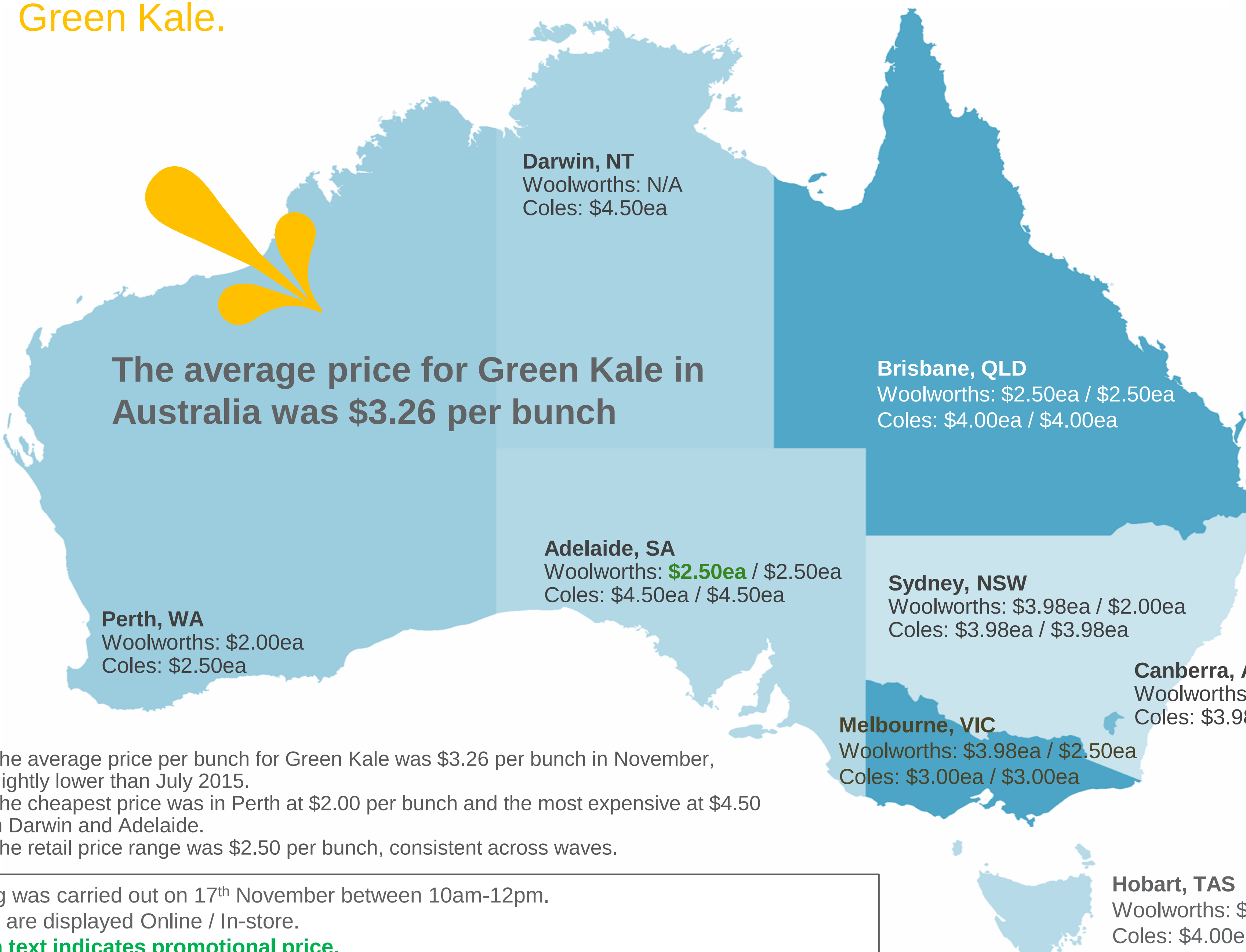
Bunched kale is the most common purchase format, consistent with the previous wave. This wave sees an increase in pre-prepared mixed vegetable formats.



Q4b. In what fresh formats do you typically purchase kale?
Sample Wave 26 N=200, Wave 30, N=205

Online and In-store Commodity Prices.

Green Kale.

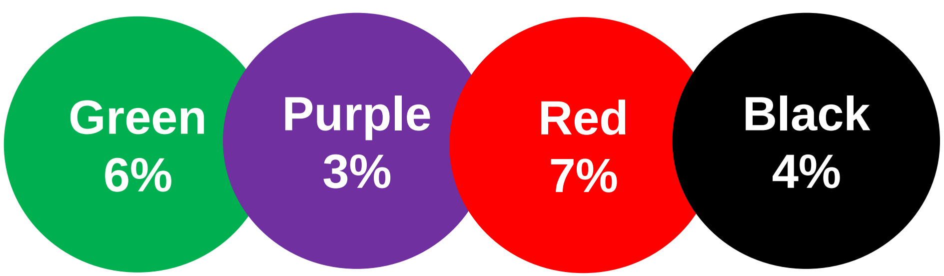


- The average price per bunch for Green Kale was $3.26 per bunch in November, slightly lower than July 2015.
- The cheapest price was in Perth at $2.00 per bunch and the most expensive at $4.50 in Darwin and Adelaide.
- The retail price range was $2.50 per bunch, consistent across waves.

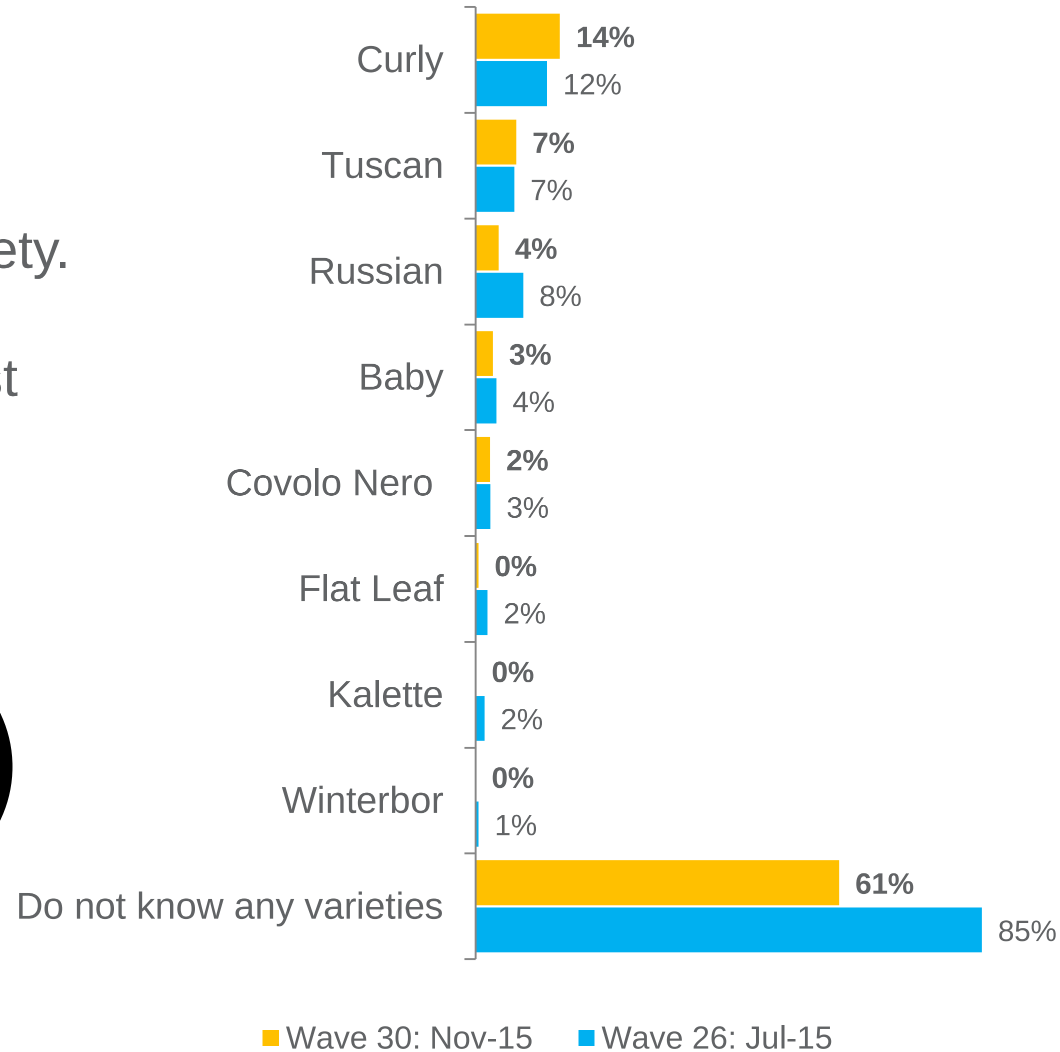
Pricing was carried out on 17th November between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates promotional price.

Awareness of types of kale has substantially improved this wave; however, almost two thirds of consumers still cannot recall a variety.

Curly Leaf and Tuscan are the most recalled forms of kale.

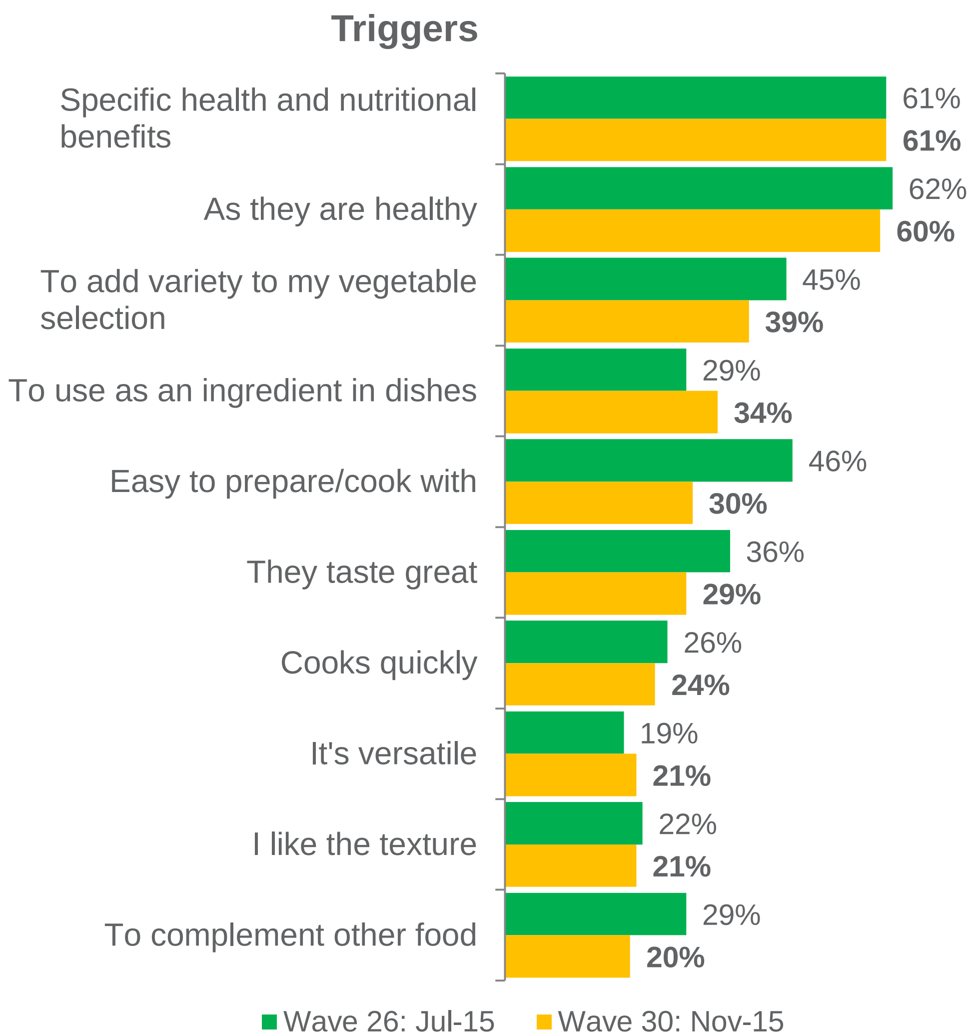


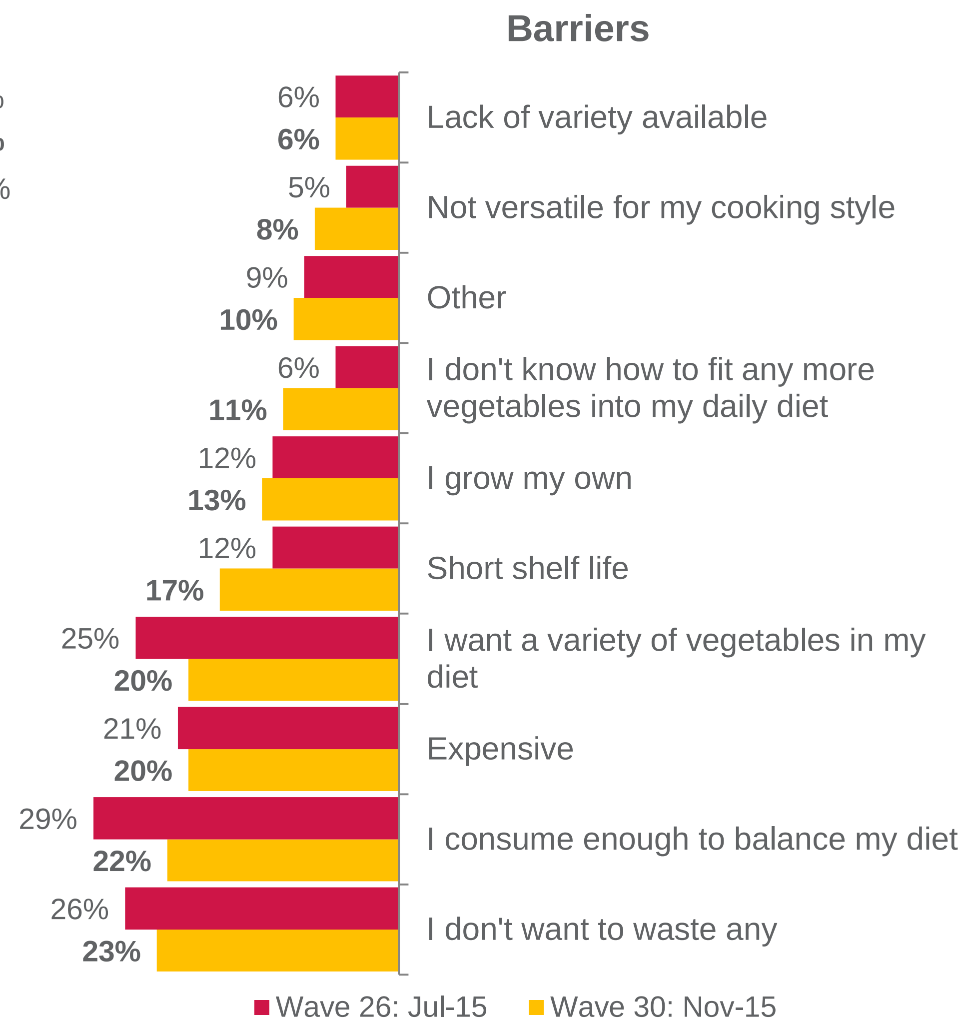
Colour recall for kale types



Q6a. What varieties of kale are you aware of? (unprompted)
Sample Wave 26 N=200, Wave 30, N=205

The key drivers of purchase for kale are health related as kale has specific health and nutritional benefits. This wave sees a substantial decline in ease of preparation/cooking as a trigger to purchase. In contrast, wanting to avoid waste is the key barrier to purchase.





Q7. Which of the following reasons best describes why you purchase kale?
Q8. Which reason best describes why you don't buy kale more often?
Sample Wave 26 N=200, Wave 30, N=205

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Australian and Chinese cuisine are popular for kale dishes, consistent with the previous wave.

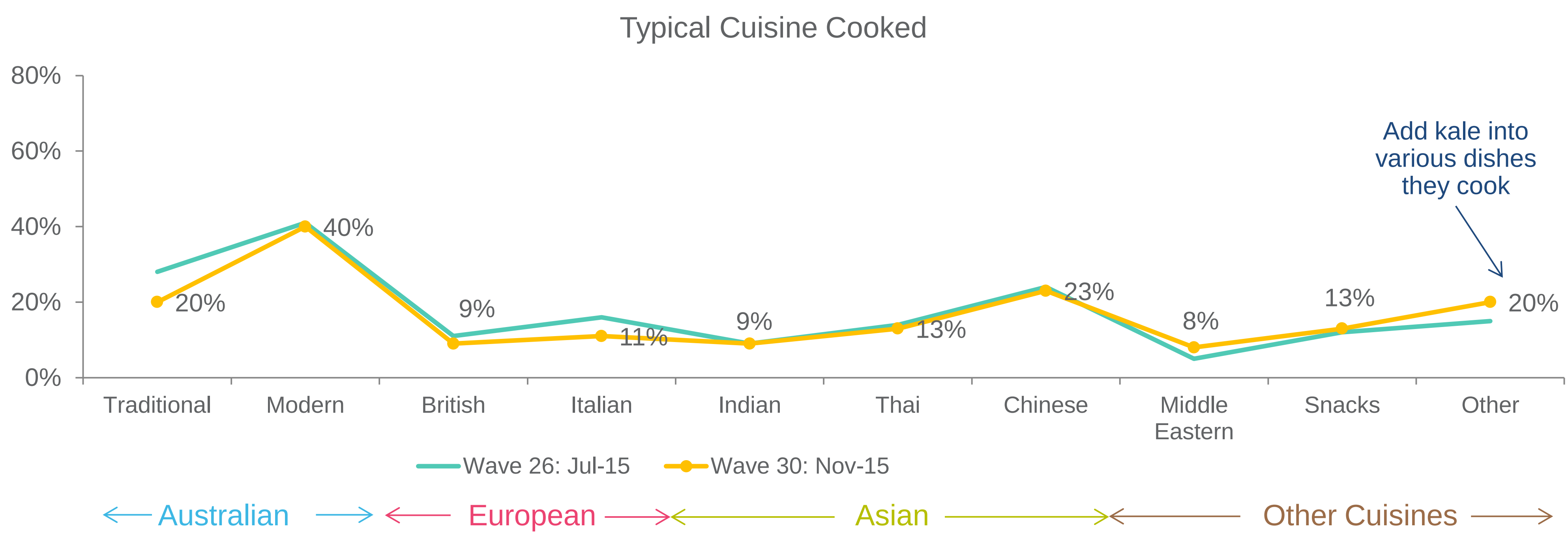
Meal occasions tend to occur during dinner and family meals.

Top 5 Consumption Occasions

	Wave 26	Wave 30
Dinner	57%	**57%**
Family Meals	46%	**37%**
Quick Meals	31%	**31%**
Weekday Meals	36%	**29%**
Lunch	26%	**22%**

18% used kale when cooking a new recipe

▼ 15%, Wave 26



Q10. What cuisines do you cook/consume that use kale?
Q11. Which of the following occasions do you typically consume/use kale?
Sample Wave 26 N=200, Wave 30, N=205

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

Consumers prefer to use kale mainly with carrots, onions and tomatoes. Kale is generally stir fried and steamed. Eating kale raw is also a popular option.

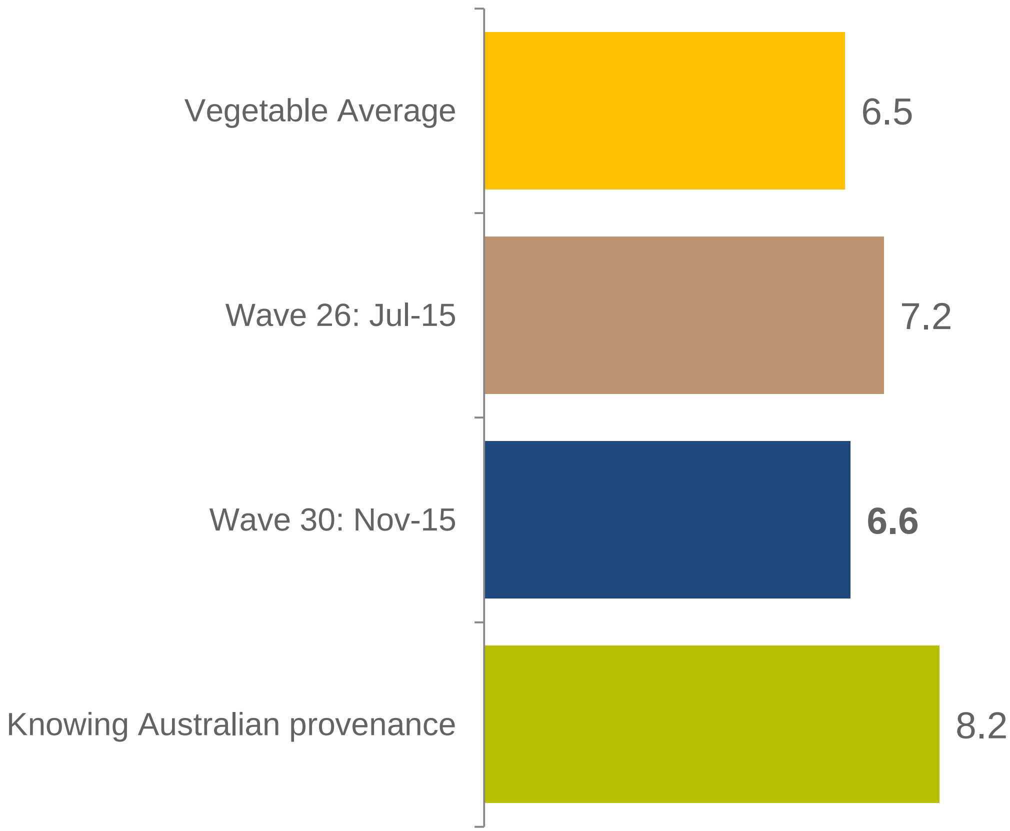
Accompanying Vegetables

Carrot	36%
Onion	30%
Tomato	27%
Garlic	26%
Potato	26%

Top 10 Cooking Styles		
	Wave 26	Wave 30
Stir frying	42%	**39%**
Steaming	34%	**39%**
Raw	26%	**31%**
Sautéing	22%	**22%**
Soup	21%	**19%**
Other	10%	**17%**
Boiling	19%	**15%**
Roasting	10%	**13%**
Baking	10%	**11%**
Frying	11%	**10%**

Q9. How do you typically cook kale?
Q10a. And when are you serving kale which of the following do you also serve together with this?
Sample Wave 26 N=200, Wave 30, N=205

This wave sees a decline in the importance of kale provenance. However, knowing that kale is grown in Australia is still important information for consumers.



8.2

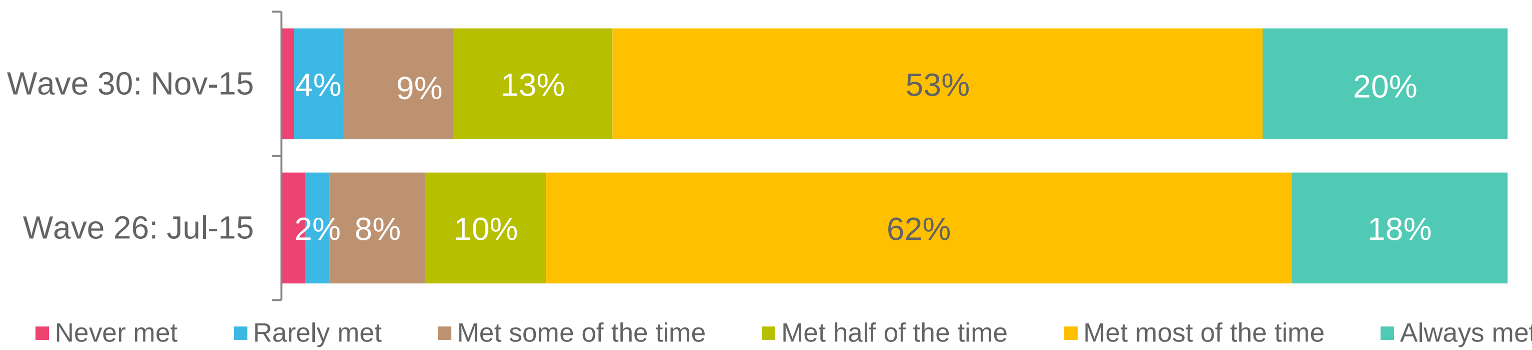
Q14. When purchasing kale, how important is Provenance to you?
Q15. And when purchasing Kale, how important is that it is grown in Australia?
Sample Wave 26 N=200, Wave 30, N=205

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

Expected to stay fresh for **6.8** days

▼ 6.1 days, Wave 26

Expectations Met



Q12. How long do you expect kale to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy kale?
Sample Wave 26 N=200, Wave 30, N=205

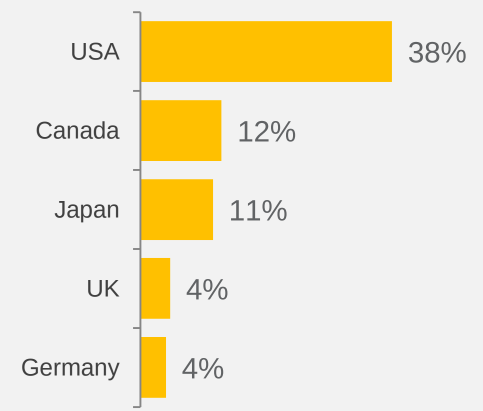
Kale Product Launch Trends.

Kale Global Launches

September – November 2015

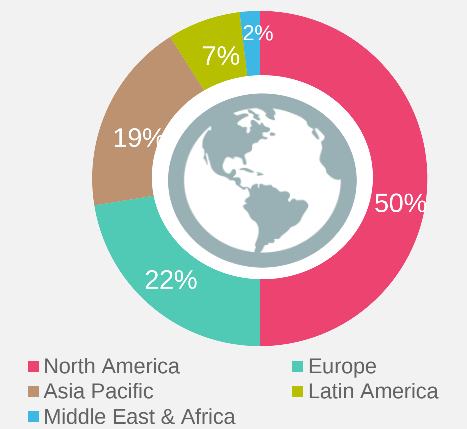
There were 156 kale products launched globally over the last three months. The majority of launches were in USA and Canada. Categories for launches were juice drinks and snacks. Key packaging for kale products were in flexible packaging and bottles.

Country

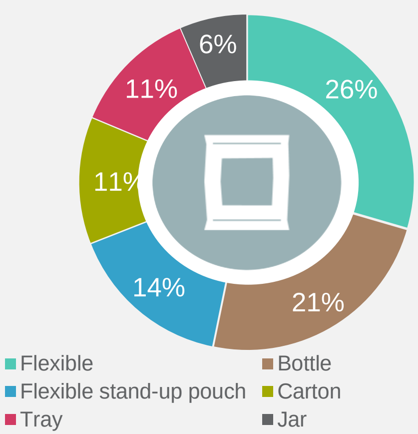


156 Global NPDs

Region



Top Pack Formats



Categories

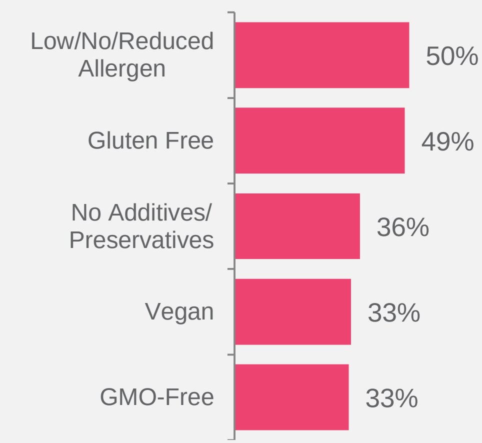
Juice Drinks 26%

Snacks 25%

Fruits & Vegetables 12%

Meals 11%

Top Claims

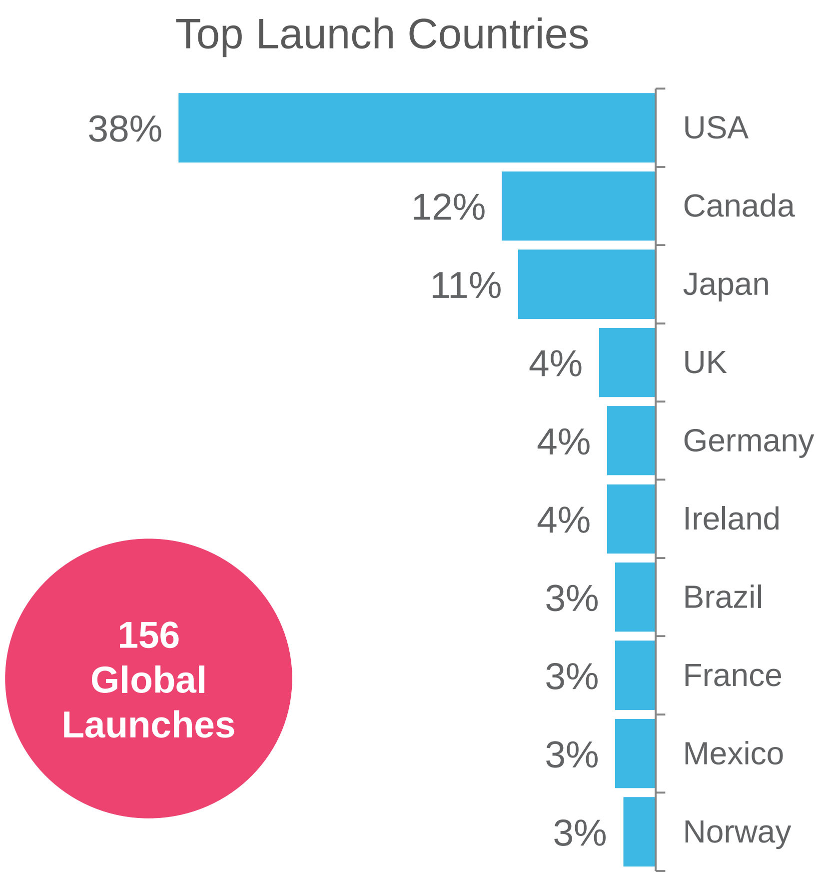


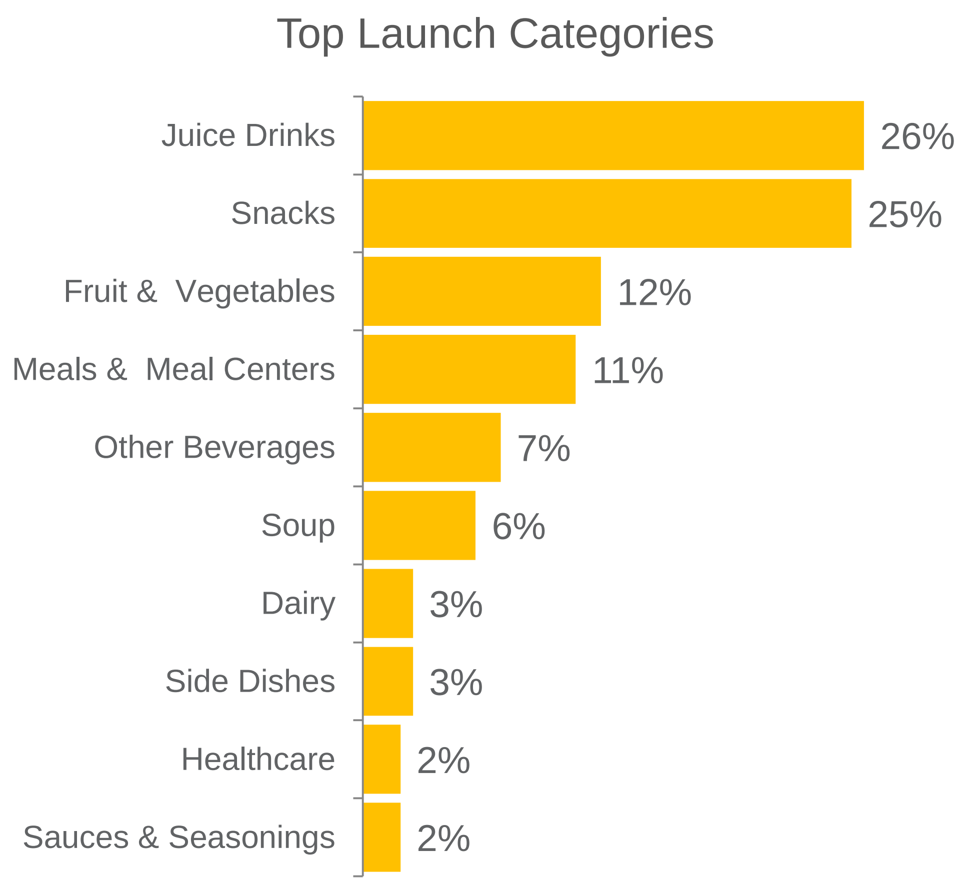
Kale Product Launches:
Last 3 Months (September – November 2015)
Summary

- There were 156 launches in the past 3 months globally that contained kale as an ingredient.
- There were 2 products launched in Australia over the past three months.
- North America (50%) and Europe (22%) were the key regions for launches.
- Flexible packaging (26%) and bottles (21%) were the most common formats used for products.
- The main categories for launches were juice drinks (26%), snacks (25%) and fruits & vegetables (12%).
- Claims used on products highlighted health; low/no/reduced allergen (50%), gluten free (49%) and no additives/preservatives (36%).
- The most innovative product launched was a Green Detox icy-poles containing Kale from the USA. More examples can be found in the following pages.

Source: Mintel (2015)

The majority of kale launches occurred in USA and Canada. The key categories for kale launches are juice drinks, snacks, fruits & vegetables and meals, consistent with the previous wave.





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The main claim globally was low/no/reduced allergen and gluten free. Flexible and bottle packaging are primarily used for kale products.

Pack Formats Used

Region	Pack format	%
Global	Flexible	26%
	Bottle	21%
	Flexible stand-up pouch	14%
North America	Flexible	29%
	Bottle	19%
	Tray	13%
Europe	Flexible	34%
	Bottle	23%
	Tray	17%

Top Claims Used

Region	Claim	%
Global	Low/No/Reduced Allergen	50%
	Gluten Free	49%
	Vegan	31%
North America	Low/No/Reduced Allergen	59%
	Gluten Free	58%
	GMO Free	51%
Europe	Low/No/Reduced Allergen	57%
	Vegan	57%
	No Animal Ingredients	57%

Only regions with n >30 are displayed

Innovative Kale Launches:
L3M (September – November 2015)

New York Naturals Sea Salt & Vinegar Kale Chips (France)

New York Naturals Sea Salt & Vinegar Kale Chips are handmade with the whole kale leaf. This raw and vegan product is kosher certified, is free from gluten and is not baked or fried. It retails in an 85g pack featuring a QR code and the Facebook and Twitter logos.

Claims:
Low/No/Reduced Allergen, Vegan, Kosher, Social Media, Gluten-Free, No Animal Ingredients

Organics Happy Mama Prenatal Apple, Kale & Kiwi with Soothing Ginger Snack (USA)

Organics Happy Mama Prenatal Apple, Kale & Kiwi with Soothing Ginger Snack is specially formulated for pregnant and breastfeeding women. The product provides 230mg of choline (40% DV) and 35mg DHA to help support baby's brain and eye development while in the womb, and 260mg calcium (20% DV) to support bone health for both mom and baby.

Claims:
Brain & Nervous System (Functional), GMO-Free, Other (Functional), Kosher, Low/No/Reduced Sugar, Organic, Female, Bone Health

President's Choice Kale Blend (Canada)

President's Choice Kale Blend has been repackaged in a newly designed 227g pack featuring serving suggestions. The product is an excellent source of vitamins A, C and K and comprises a mix of already chopped and washed red, green and Tuscan kale.

Claims:
N/A

Evol. Scramble Cups Egg White, Veggies & Cheese (USA)

Evol. Scramble Cups Egg White, Veggies & Cheese is free from gluten and contains 9g protein per serving. This microwavable meal is made with cage-free eggs and is suitable for vegetarians. The product retails in a 5-oz. tub bearing the Facebook and Twitter logos. One pack provides two Evol. points, which can be used to get Evol. Gear.

Claims:
Low/No/Reduced Allergen, Low/No/Reduced Calorie, Slimming, Ethical - Animal, Microwaveable, Gluten-Free, Social Media, Vegetarian

Source: Mintel (2015)

Innovative Kale Launches:
L3M (September – November 2015)

SMT Fire Roasted Crushed Tomatoes with Eggplant, Kale & Beet Puree (USA)

SMT Fire Fire Roasted Crushed Tomatoes with Eggplant, Kale & Beet Puree is said to be made with only the finest tomatoes that have been roasted at their peak of freshness, and eggplant, kale and beet puree were added to for extra nutrition and flavor. The product can be substituted for canned tomatoes. It retails in a recyclable 26.46-oz. BPA-free pack, featuring the FSC and the Rainforest Alliance logos and a QR code.

Claims:
Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Ethical - Human

Luke's Organic Kale MultiGrain & Seed Chips (Singapore)

Luke's Organic Kale Multigrain & Seed Chips are suitable for vegans and are free from gluten, GMOs, soy, dairy, peanut and tree nut. This kosher, and USDA and Quality Assurance International certified organic product contains wholegrain, and retails in a 142g pack featuring the Whole Grain Council, Non GMO Project Verified and Certified Vegan logos. The manufacturer states on the pack that part of the proceeds from the sales go to the Red Cross for weather disaster relief.

Claims:
Low/No/Reduced Allergen, GMO-Free, Gluten-Free, Vegan, Kosher, Ethical - Charity, Organic, No Animal Ingredients, Wholegrain

Iceland Seasonal Selection Curly Kale (UK)

Iceland Seasonal Selection Curly Kale is now available. The microwavable product is said to have been harvested at the optimum time and frozen to lock in the flavour. It can be heated from frozen in four minutes, contains no artificial colours, flavours or preservatives, and retails in a 1kg pack.

Claims:
No Additives/Preservatives, Seasonal, Microwaveable

Ohayo Hanako To Collabo Shita La France Mix & Vegetables Yogurt Smoothie (Japan)

Ohayo Hanako To Collabo Shita La France Mix & Vegetables Yogurt Smoothie contains celery, kale, yogurt and vitamin C. The product retails in a 180g pack. Launched on October 6, 2015. RRP not available.

Claims:
Seasonal

Source: Mintel (2015)

Innovative Kale Launches:
L3M (September – November 2015)

Real Health Super Foods Raaw Juice Go Green Raw Juice Powder (Sweden)

Real Health Super Foods Raaw Juice Go Green Raw Juice Powder is stuffed with super-greens such as apple, pineapple, wheat grass, barley grass, coconut milk, chlorella, kale, spinach, coconut water, stevia and silica. This 100% natural product is free from gluten, lactose, dairy and artificial sugar, sweeteners, additives, flavourings, flavour enhancers and colourants.

Claims:
Low/No/Reduced Lactose, No Additives/Preservatives, All Natural Product, Low/No/Reduced Allergen, Botanical/Herbal, Vegan, On-the-Go, Low/No/Reduced Sugar, Ease of Use, Gluten-Free, No Animal Ingredients

RW Garcia 3 Seed Kale Crackers (Canada)

RW Garcia 3 Seed Kale Crackers are gluten free and include kale, stone ground white corn, flaxseed, sesame and chia. They are made with non-genetically engineered white corn flour and corn oil or sunflower oil, and free from trans fat and wheat. The kosher certified product features a tasty crunch and retails in a 180g pack featuring a QR code.

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

Vita Mundi Detox Green Juice (Brazil)

Vita Mundi Detox Suco Verde (Detox Green Juice) is now available. This gluten-free product comprises mixed apple, pineapple, ginger, kale, lemon, watercress, cucumber and chlorophyll juices, and contains no preservatives or added sugar. It is made with 100% natural ingredients, is described to be more practical, happier and healthier to conquer wellbeing, and retails in a 1L recyclable pack featuring the FSC logo.

Claims:
No Additives/Preservatives, All Natural Product, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Package, Low/No/Reduced Sugar, Ease of Use, Gluten-Free, Digestive (Functional)

Eatpops Green Detox Kale, Spinach, Apple, Pineapple, Lemon, Ginger & Cayenne Pops (USA)

Eatpops Green Detox Kale, Spinach, Apple, Pineapple, Lemon, Ginger & Cayenne Pops are made using real fruit and vegetable, and said to be delicious, nutritious and guilt free. The kosher certified product is free from fat, gluten, dairy, added sugar, artificial sweeteners and added coloring, and is suitable for a vegan diet. The all-natural product retails in a 9-oz. pack containing three 3-oz. units and featuring a social media hashtag.

Claims:
No Additives/Preservatives, All Natural Product, Low/No/Reduced Allergen, No Animal Ingredients, Vegan, Kosher, Low/No/Reduced Fat, Low/No/Reduced Sugar, Gluten-Free, Social Media

Source: Mintel (2015)

Australian Kale Launches:
L3M (September – November 2015)

La Gina La Zuppa Kale, Quinoa & Vegetable Soup

La Gina La Zuppa Kale, Quinoa & Vegetable Soup is described as a nutritious combination of kale, quinoa, lentils and vegetables. This all natural, gluten- and dairy-free, microwavable product is said to contain the finest ingredients. is 99% fat free and retails in a 540g pack.

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

Super Nature Super Foods Homestyle Sweet Potato Cottage Pie

Super Nature Super Foods Homestyle Sweet Potato Cottage Pie features tender lean beef mince mixed with black garlic, carrots, peas, red lentils, kale and amaranth, topped with sweet potato mash and sprinkled with breadcrumbs, parsley and cheese. The 97% fat free product is claimed to be a good source of protein, and is free from preservatives, artificial flavours and colours.

Claims:
Beauty Benefits, No Additives/Preservatives, Immune System (Functional), Brain & Nervous System (Functional), High/Added Fiber, Other (Functional), Ethical - Environmentally Friendly Package, Low/No/Reduced Fat, Time/Speed, Microwaveable, High Protein, Antioxidant, Low/No/Reduced Glycemic, Digestive (Functional), High Satiety

Source: Mintel (2015)

Leek.

On average, leeks are purchased two or three times a month, and are consumed once a week.

Leeks are generally purchased from Woolworths and Coles, consistent with the previous wave.

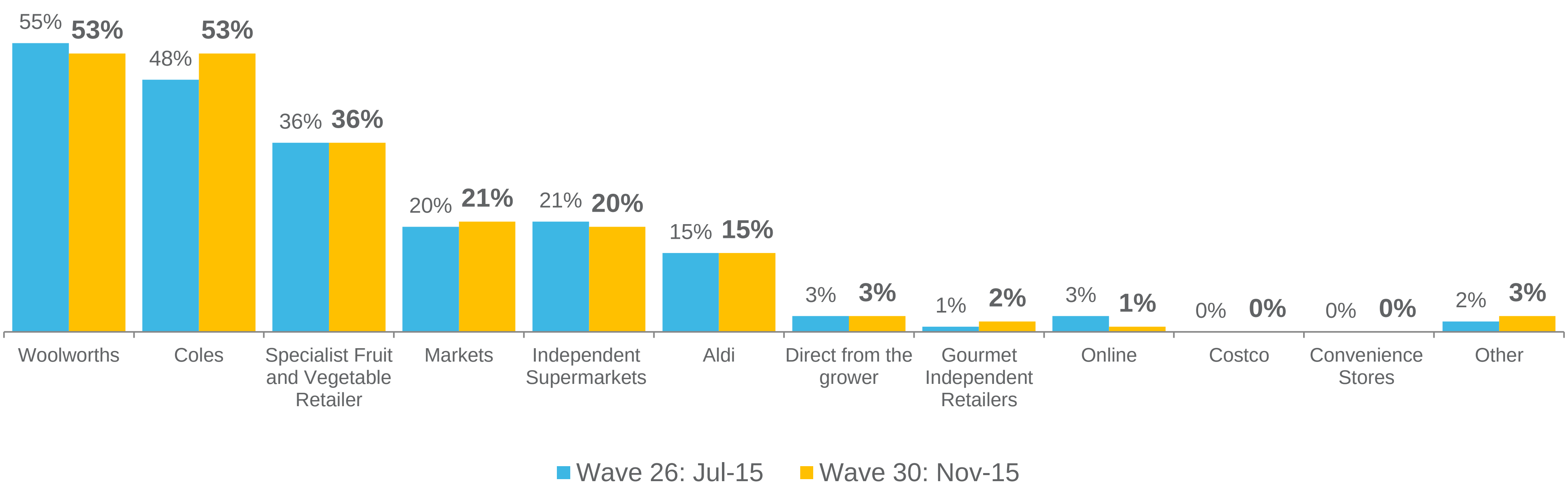
Average Purchase **2.4** times per month

▼ 2.2 times, Wave 26

Average Consumption **4.4** times per month

▼ 3.9 times, Wave 26

Purchase Channels



Q1. On average, how often do you purchase leeks?
Q2. On average, how often do you consume leeks?
Q5. From which of the following channels do you typically purchase leeks?
Sample Wave 26 N=206, Wave 30 N=204

Horticulture Innovation Australia

colmar brunton.

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

Average Spend and Price Sensitivity.

Average weight of purchase

The average consumer typically purchases **800g** of leeks, consistent with the previous wave.

— 800g, Wave 26

Recalled last spend

Recalled last spend on leeks was **$3.50**, remaining relatively consistent with the past wave.

▼ $3.30, Wave 26

Value for money

Consumers' perceived value for money is fair for leeks **(6.0/10)**.

▲ 6.2/10, Wave 26

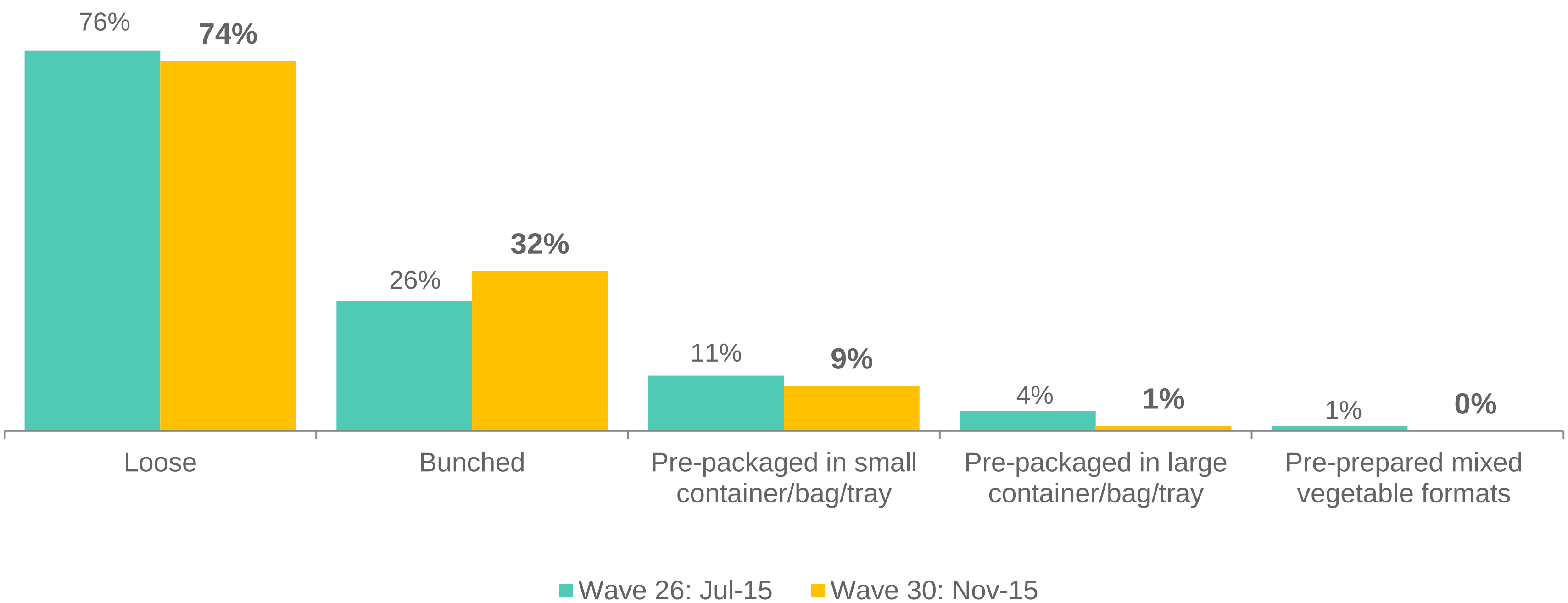
Q3. How much leek do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 26 N=206, Wave 30 N=204

Horticulture Innovation Australia

colmar brunton.

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

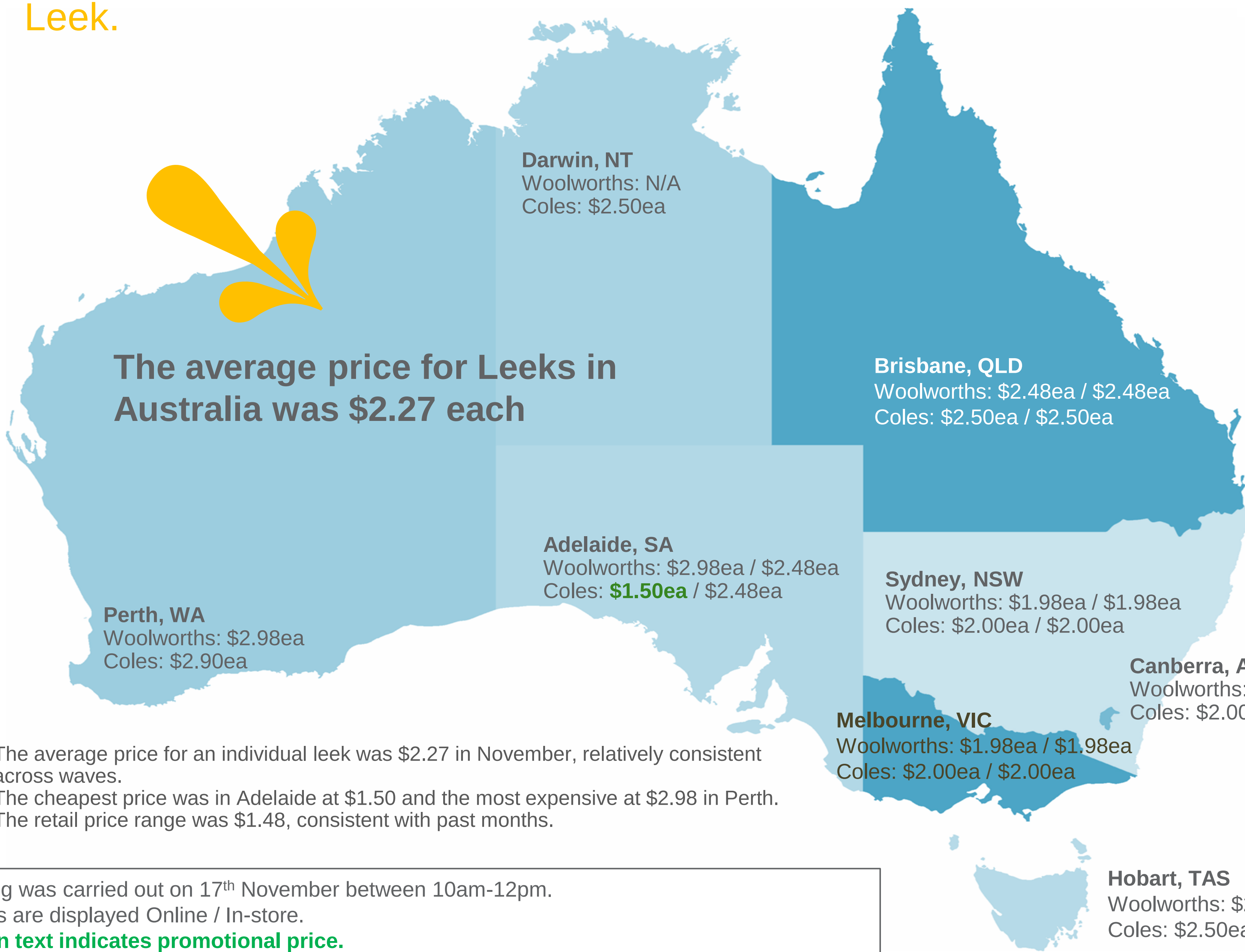
Individual leeks are the most common purchase format. Bunched leeks are another popular option and have seen an increase in popularity this wave.



Q4b. In what fresh formats do you typically purchase leeks?
Sample Wave 26 N=206, Wave 30 N=204

Online and In-store Commodity Prices.

Leek.



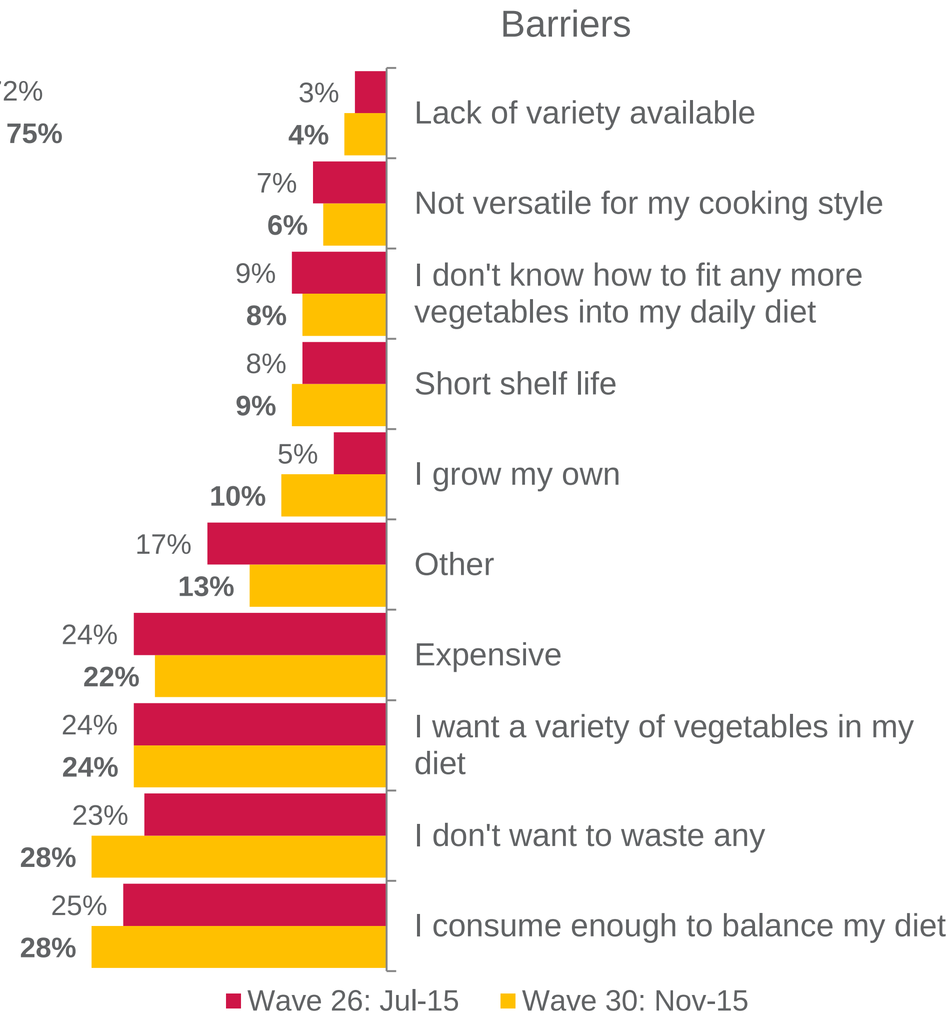
- The average price for an individual leek was $2.27 in November, relatively consistent across waves.
- The cheapest price was in Adelaide at $1.50 and the most expensive at $2.98 in Perth.
- The retail price range was $1.48, consistent with past months.

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

Awareness of leek varieties is low, with 91% of consumers unable to recall a type. This has declined even further from the 85% of consumers unable to recall a type in Wave 26.

Q6a. What varieties of leek are you aware of? (unprompted)
Sample Wave 26 N=206, Wave 30 N=204

Using leeks as an ingredient in dishes, their great taste and their ease of preparation are the key drivers of purchase, consistent with the previous wave. In contrast, the key barriers to purchase are already consuming enough to balance their diet and not wanting to waste any.



Q7. Which of the following reasons best describes why you purchase leeks?
Q8. Which reason best describes why you don't buy leeks more often?
Sample Wave 26 N=206, Wave 30 N=204

This wave sees a relatively large increase in the use of Modern Australian, Italian, Indian, Thai and Chinese cuisines when cooking leeks.

Meal occasions tend to occur during dinner. One quarter of consumers used leeks when cooking a new recipe.

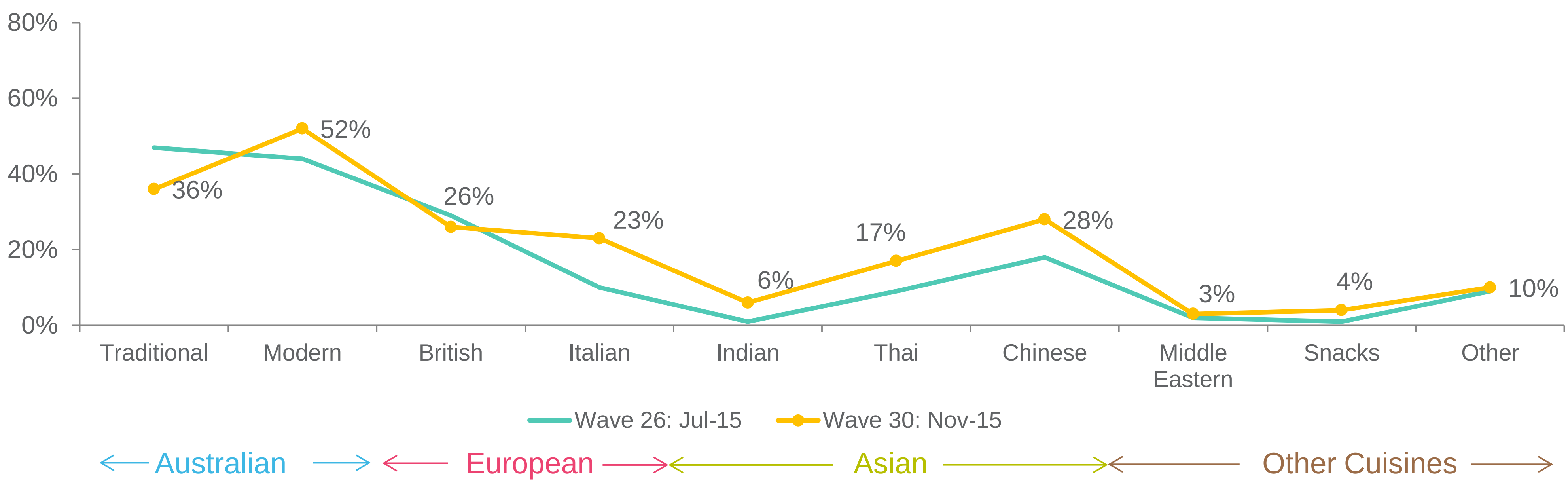
Top 5 Consumption Occasions

	Wave 26	Wave 29
Dinner	66%	**70%**
Family meals	58%	**57%**
Weekday meals	39%	**39%**
Weekend meals	29%	**34%**
Quick meals	21%	**28%**

26% used leeks when cooking a new recipe

▼ 19%, Wave 26

Typical Cuisine Cooked



Q10. What cuisines do you cook/consume that use leeks?
Q11. Which of the following occasions do you typically consume/use leeks?
Sample Wave 26 N=206, Wave 30 N=204

Horticulture Innovation Australia

colmar brunton.

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

Consumers prefer to serve leeks with potatoes and carrots, consistent with the previous wave. Leeks are generally cooked in soups and stir fried.

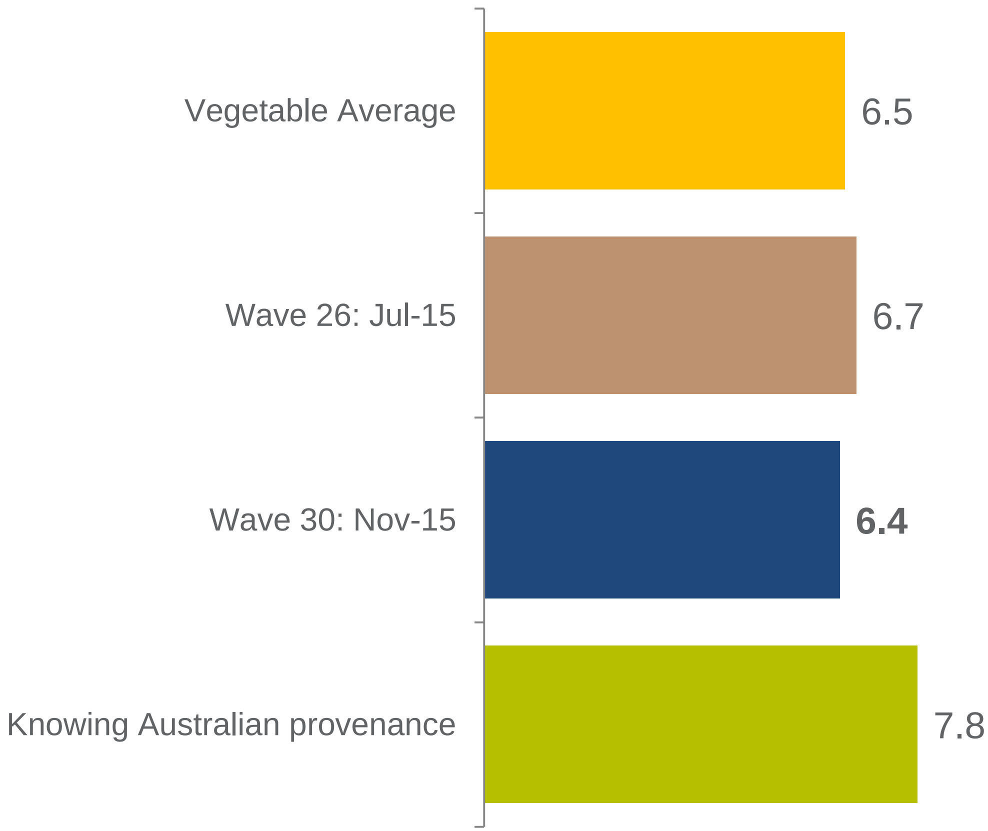
Accompanying Vegetables

Potato	57% ▼
Carrot	41% ▼
Onion	28% –
Garlic	23% ▲
Capsicum	22% ▲

Top 10 Cooking Styles	Wave 26	Wave 29
Soup	68%	**55%**
Stir frying	37%	**45%**
Sautéing	33%	**39%**
Frying	22%	**31%**
Slow Cooking	30%	**23%**
Roasting	8%	**15%**
Baking	11%	**15%**
Steaming	17%	**12%**
Boiling	12%	**11%**
Microwave	6%	**6%**

Q9. How do you typically cook leeks?
Q10a. And when are you serving leeks which of the following do you also serve together with this?
Sample Wave 26 N=206

This wave sees a slight decline in the importance of the provenance of leeks, sitting just below Vegetable Average.



7.8

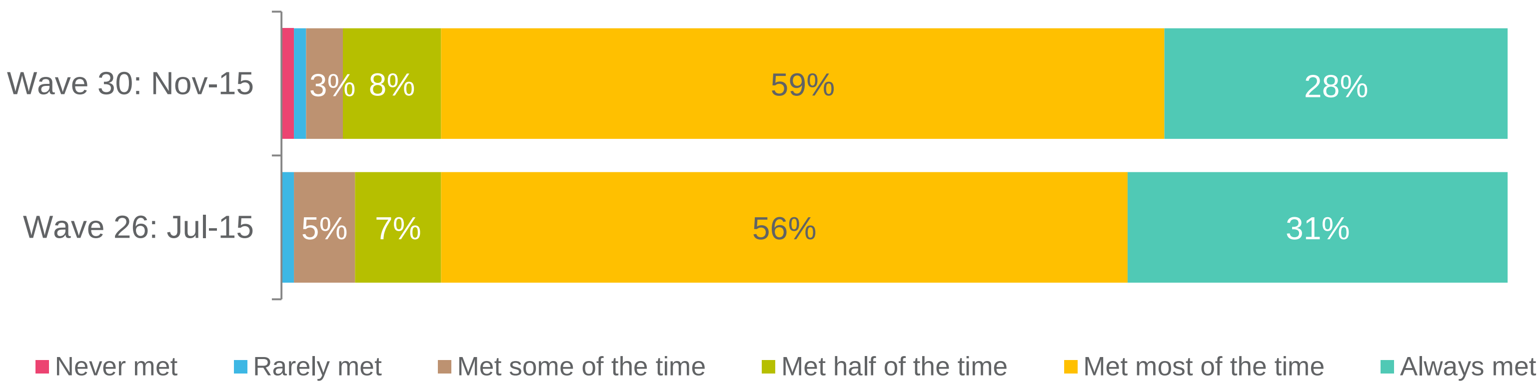
Q14. When purchasing leeks, how important is Provenance to you?
Q15. And when purchasing Leeks, how important is that it is grown in Australia?
Sample Wave 26 N=206, Wave 30 N=204

Consumers expect leeks to remain fresh for just over a week once purchased, which is being met most of the time. However, having expectations always met has slightly declined this wave.

Expected to stay fresh for **8.6** days

▲ 8.9 days, Wave 26

Expectations Met



Q12. How long do you expect leeks to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy leeks?
Sample Wave 26 N=206, Wave 30 N=204

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

Leek Product Launch Trends.

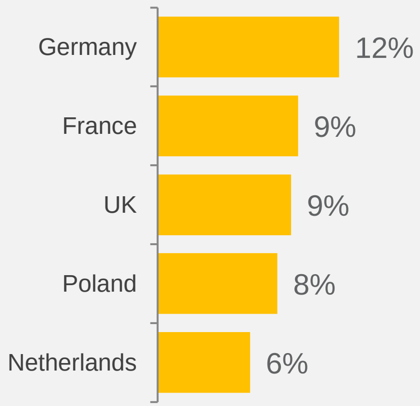
Leek Global Launches

September – November 2015

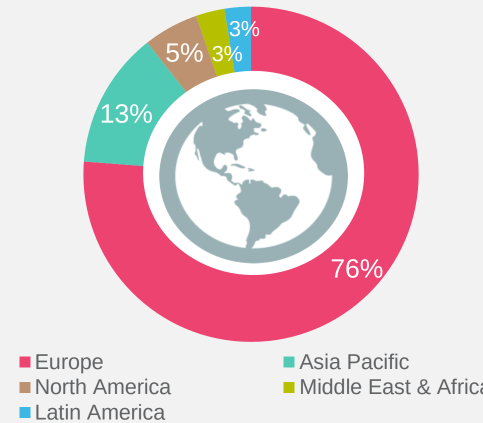
There were 433 leek products launched globally over the last three months. The majority of launches were in Germany and France. Categories for launches were meals and sauces & seasonings.

433 Global NPDs

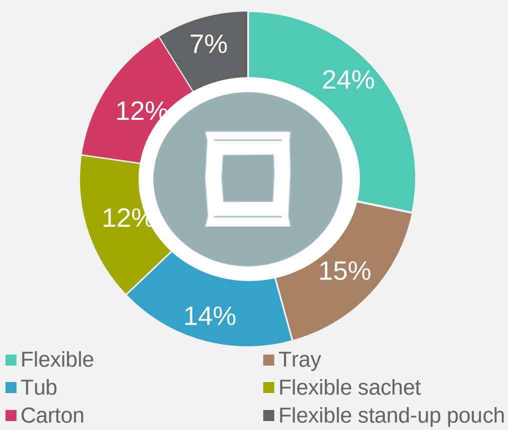
Country



Region



Top Pack Formats



Categories

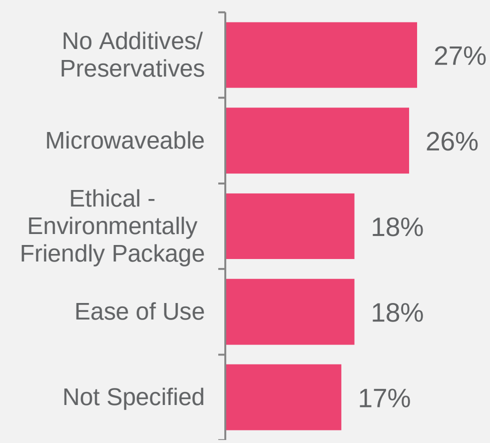
Meals 29%

Sauces & Seasonings 20%

Soup 17%

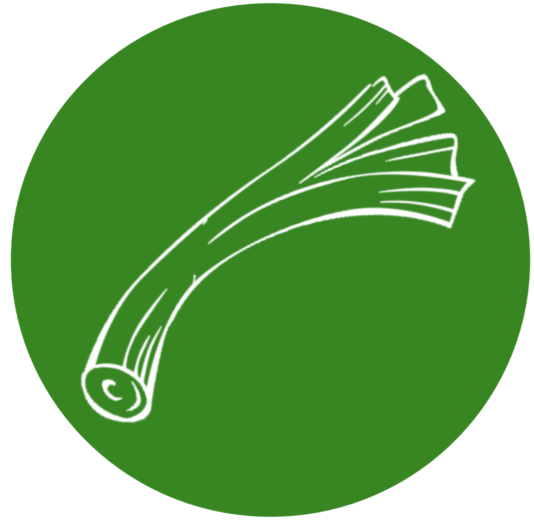
Processed Products 14%

Top Claims



Leek Product Launches:
Last 3 Months (September – November 2015)
Summary

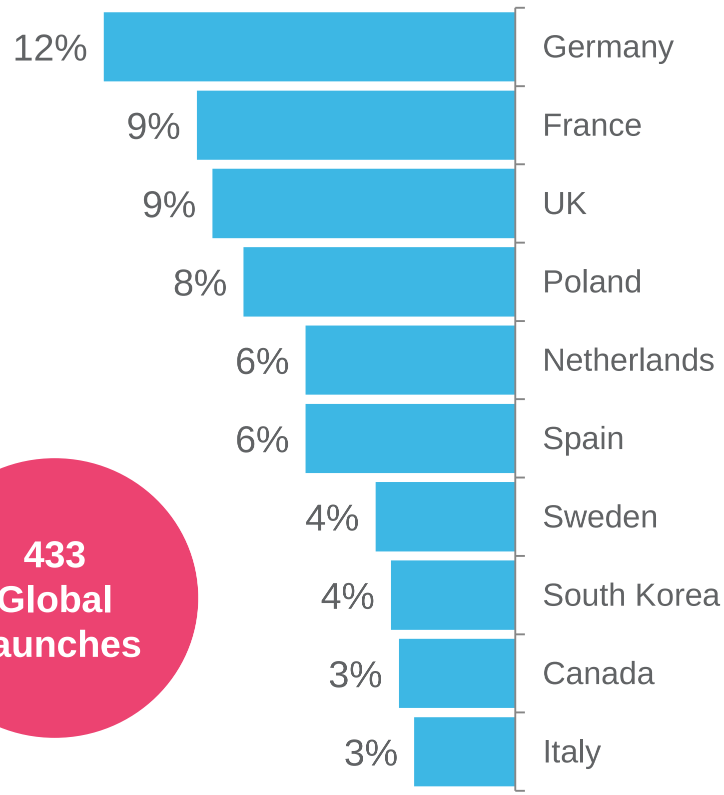
- There were 433 launches in the past 3 months globally that contained leeks as an ingredient.
- There was one product launched in Australia over the past three months.
- Europe (76%) was the key region for launches.
- Flexible packaging (24%), trays (15%) and tubs (14%) were the most common format used for products.
- The main categories for launches were meals (29%), sauces & seasonings (20%) and soups (17%).
- Claims used on products included no additives/preservatives (27%), microwaveable (26%) and ethical – environmentally friendly packaging (18%).
- The most innovative product launched was Leek and Cheese Swirls from the Netherlands. Other examples can be found in the following pages.



Source: Mintel (2015)

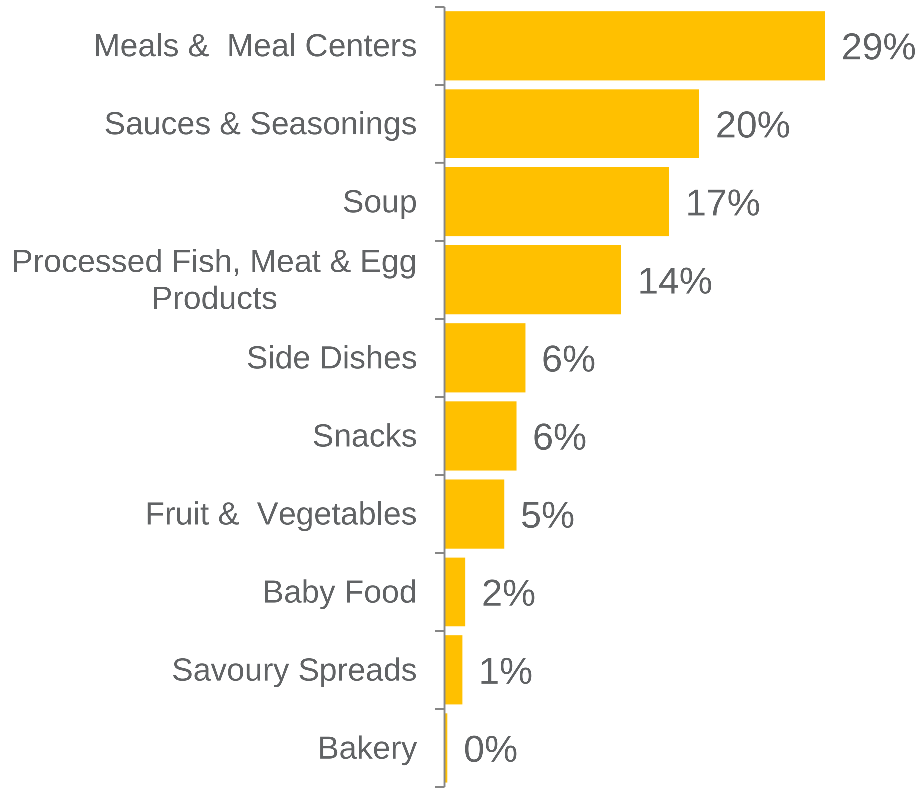
The majority of launches occurred in Germany and France. The key categories for leek launches are meals, sauces & seasonings, soups and processed products, consistent with the previous wave.

Top Launch Countries



433 Global Launches

Top Launch Categories



The main claims globally were no additives & preservatives, microwaveable, and ethical & environmentally friendly packaging. Flexible packaging is the most commonly used pack format for leek products.

Pack Formats Used

Region	Pack Format	%
Global	Flexible	24%
	Tray	15%
	Tub	14%
Europe	Flexible	19%
	Tub	16%
	Tray	15%
Asia Pacific	Flexible	53%
	Flexible Sachet	14%
	Flexible Stand-Up Pouch	12%

Top Claims Used

Region	Claim	%
Global	No Additives/Preservatives	27%
	Microwaveable	24%
	Ethical - Environmentally Friendly Package	17%
Europe	No Additives/Preservatives	28%
	Microwaveable	25%
	Ethical - Environmentally Friendly Package	20%
Asia Pacific	No Additives/Preservatives	26%
	Halal	26%
	Time/Speed	26%

Only regions with n >30 are displayed

Innovative Leek Launches:
L3M (September – November 2015)

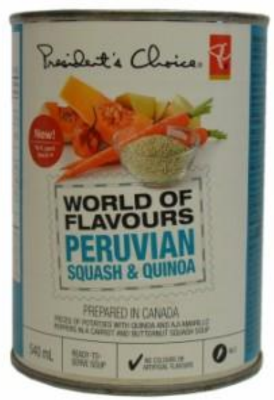
Maggi Vegetable Bouillon Powder (Switzerland)

Maggi Gemüsebouillonpulver (Vegetable Bouillon Powder) is now available. The product is said to be low in fat and made with natural ingredients, and contains chervil, onions, carrots and celery. It is suitable for vegetarians and retails in a 300g pack.

Claims:
Vegetarian, Low/No/Reduced Fat

President's Choice World of Flavours Peruvian Squash & Quinoa Soup (Canada)

President's Choice World of Flavours Peruvian Squash & Quinoa Soup contains pieces of potatoes with quinoa, aji amarillo peppers in a carrot and butternut squash soup. This soup has a mild spicy taste, and can be microwaved. The ready to serve product contains no colours or artificial flavours, and retails in a 540ml pack.



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

VégéDélice Vegetarian Italian-Style Portions in Breadcrumbs (France)

VégéDélice Pané à l'Italienne Végétalien (Vegetarian Italian-Style Portions in Breadcrumbs) comprise Mediterranean vegetables, sun dried tomatoes, fresh herbs and responsibly sourced RTRS certified soya, coated in crispy golden breadcrumbs. This product is said to be a healthy and rich alternative to meat, can be pan or oven heated, and retails in a 450g pack containing six units.

Claims:
Vegan, Ethical - Environmentally Friendly Product, Time/Speed, Ethical - Human, Ease of Use, No Animal Ingredients, Vegetarian

Hua Wei Food Japanese Style Frozen Cooked Dumplings with Pork and Leek (Taiwan)

Hua Wei Food Japanese Style Frozen Cooked Dumplings with Pork and Leek are processed according to an advanced Japanese dumpling making technique. They can be boiled, steamed, pan fried, or deep fried. This product is free from preservatives and retails in a 1900g pack.

Claims:
No Additives/Preservatives

Source: Mintel (2015)

Innovative Leek Launches:
L3M (September – November 2015)

Asda Ready To Cook Chicken with Bacon & Leek (UK)

Asda Ready To Cook Chicken with Bacon & Leek has been relaunched with an improved recipe and a new brand name, formerly known as Asda Chosen by You.This ready to cook and freezable product consists of two chicken breast fillets with leeks, cooked bacon, Red Leicester and mature cheddar in a mature cheddar cheese sauce. It can be oven cooked in 30 minutes and contains no artificial colours, flavours or hydrogenated fat. It also retails in a recyclable 420g pack that serves two people.

Claims:
Ease of Use, No Additives/Preservatives, Low/No/Reduced Transfat, Ethical - Environmentally Friendly Package

Kiddyum Fish and Veg Pie (UK)

Kiddyum Fish and Veg Pie is made with all natural ingredients including sustainable fish. It is suitable for children aged one to four years old and is free from sugar, preservatives, GM ingredients, artificial colours and flavours. It is low in salt and can be ready in five minutes in a microwave. This product retails in a recyclable 200g pack that features a QR code and the FSC, Facebook and Twitter logos.

Claims:
No Additives/Preservatives, All Natural Product, GMO-Free, Social Media, Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Low/No/Reduced Sugar, Microwaveable, Low/No/Reduced Sodium, Babies & Toddlers (0-4), Time/Speed

Tillman's Toasty Vegetarian Snack for Toasting (Germany)

Tillman's Toasty Der Snack zum Toasten Vegetarisch (Vegetarian Snack for Toasting) is new to the range. This 100% meat-free product comprises chopped roasted vegetables in a toast-like shape, with an extra crispy breadcrumb coating. It is suitable for vegetarians, can be toasted, oven-baked or pan-heated, and retails in a 140g pack containing two units.

Claims:
Vegetarian

Eridanous Leek and Cheese Swirls (Netherlands)

Eridanous Krokante Gebak met een Prei-Kaas Vulling (Leek and Cheese Swirls) are described as pastry whirls with a leek, Mizithra cheese and feta cheese filling. The ready to bake product retails in a 680g pack, bearing a QR code.

Claims:
Ease of Use

Source: Mintel (2015)

Innovative Leek Launches:
L3M (September – November 2015)

Liebig Lobster Soup (France)

Liebig Velouté de Homard (Lobster Soup) can be heated in a pan or microwave. The product retails in a 1L recyclable pack featuring the FSC logo. The manufacturer claims to be committed to preserving the environment and to offer thousands of products per year to charity organisations so that everyone can enjoy vegetables.

Claims:
Ethical - Charity, Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Microwaveable

Oils & More Experience Seasoning Oil (Germany)

Oils & More Erlebnis Gewürzöl (Experience Seasoning Oil) has been repackaged. It is based on extra virgin Arbequina olive oil and just needs to be shaken and served for dipping with bread. It is also suitable to marinade meat, fish, poultry and vegetables, or for roasting and grilling, and retails in a newly designed 250ml bottle featuring the Corporate Social Responsibility logo. This product was on display at the Anuga 2015 Trade Show in Cologne, Germany.

Claims:
Ease of Use, Ethical - Human

Grandiosa X-tra Allt Kebab Pizza with Garlic Sauce (Sweden)

Grandiosa X-tra Allt Kebab + Sås (Kebab Pizza with Garlic Sauce) has been stone oven baked in Sweden. This pizza comprises a crispy and golden base topped with kebab meat, peperoncini, cheese and red onion, and a garlic sauce to be used as a topping for the pizza. It retails in a 400g recyclable pack containing 355g pizza and 45g sauce. The manufacturer is a proud sponsor of Swedish football.

Claims:
Ethical - Environmentally Friendly Package

Xrisi Zimi Epirus Herbs Pie (Greece)

Xrisi Zimi Chortopita Ipeirou (Epirus Herbs Pie) comprises pastry made with olive oil and a selected filling of spinach, endive, chicory, feta and mizithra cheese. The product is made according to a traditional recipe without preservatives, cooks in 40 minutes in the oven, and retails in an 850g easy-open pack.

Claims:
No Additives/Preservatives, Convenient Packaging

Source: Mintel (2015)

Australian Leek Launches:
L3M (September – November 2015)

Crazy Dragon Chunky Prawn Gyoza Dumplings

Crazy Dragon Chunky Prawn Gyoza Dumplings have been repackaged and are now available in a 300g pack. The product is made with all natural ingredients and pork and contains 25% prawn filling, no added preservatives and no artificial colours or preservatives. The heat and eat product is of premium quality and described as fresh, healthy and bursting with flavour. It is made with pork and retails in a pack containing ten pieces and featuring Facebook and Twitter logos.

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

Source: Mintel (2015)

In the Media.

General Vegetable News
(September – November 2015)

- Coles has unveiled new ‘pick and pack’ technology which promises to cut down delivery times for online shoppers. The new system, dubbed Power Pick, has increased efficiency by up to 20 per cent and reduced order errors.

- The tablet-based technology directs a Coles team member to the exact location of each item within the order using the most efficient route possible, with the directions pinpointing items by aisle, module, shelf and position.

- Developed in-house at Coles as Rover, the technology has been sold to global retail technology provider NCR, and is likely to be picked up around the world.

- Adoption of online grocery shopping has been slow, with customers generally satisfied to shop in-store. However, Coles says its online sales are growing at more than 20 per cent per year.

http://www.news.com.au

Commodity News
(September – November 2015)

- Researchers with Zhejiang University say that pelletized broccoli by-products may be used to replace other feed ingredients and address environmental waste. The alternative feed boosts milk fat content and maintains similar levels of milk production, milk protein, lactose, total solids and solids-not-fat.
- 200,000 tonnes of pelletized broccoli-by-products were produced every year in China, creating both waste and environmental damage.

http://www.feednavigator.com/

- Levarht has announced the introduction of their new ‘Pick and Pack Hot Pepper Mix Box’, which has already been well received in the USA and Canada. The colourful hot chilli mix box with heat index indicator is perfect for retail. The concept allows customers to pick and choose their favourites, along with giving them the possibility to explore and try something new. The 2kg box is divided into 4 separate compartments.
- Depending on season and availability, hot chilli varieties will be chosen in cooperation with the retailer, wholesaler or importer.

http://www.freshplaza.com/

- The recently launched three-pack of cos lettuce at Coles supermarkets will feature a photo of Koala Farm’s Anthony Staatz. For the past three years, Mr Staatz has had his photo on the lettuce packaging at Coles.
- The aim is to personalise the products to ensure consumers understand they are grown in Australia. Koala Farms crops 700 acres twice a year.

http://www.qt.com.au/

- As part of the Australian Food Fair promotion, sweetcorn from Neerabup’s Trandos Farms was sampled by consumers in Malaysia.
- The feedback was positive, as West Australian sweetcorn tastes different to sweetcorn grown in Malaysia as it is a lot sweeter.
- WA produce was generally regarded as premium food by Malaysian consumers, and was easily recognisable due its kangaroo and sun logo.

http://www.freshplaza.com/

Commodity News
(September – November 2015)

- Scientists at the Bengaluru-based National Centre for Biological Sciences (NCBS) have found that excessive consumption of green peas could lead to paralysis due to the presence of an anti-nutritive chemical in the pulse.
- On prolonged consumption (e.g. more than three months as main diet), it may result in the outbreak of the disease called "neurolathyrism", causing irreversible paralysis of the lower limb muscles ensuing in loss of walking ability.

http://www.deccanherald.com/

- A farm in the Northern Territory is ramping up its production of kale to meet a growing demand in Darwin.
- Grown mostly in regions across southern Australia with a cooler climate, farmer David Thompson said a lot people were sceptical that kale would grow well in the far north. However, the north's dry season this year had provided great conditions. Keeping the bugs off the kale was a challenge, but a mixture of companion planting and organic pesticides had kept the crop safe.

http://www.abc.net.au/

There was no leek specific news to report this wave.

Project Harvest Background & Methodology

Background to the research.

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 30, November 2015) focuses on:

- Broccoli
- Chillies
- Lettuce
- Sweet Corn
- Green Peas
- Kale
- 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.

Horticulture Innovation Australia

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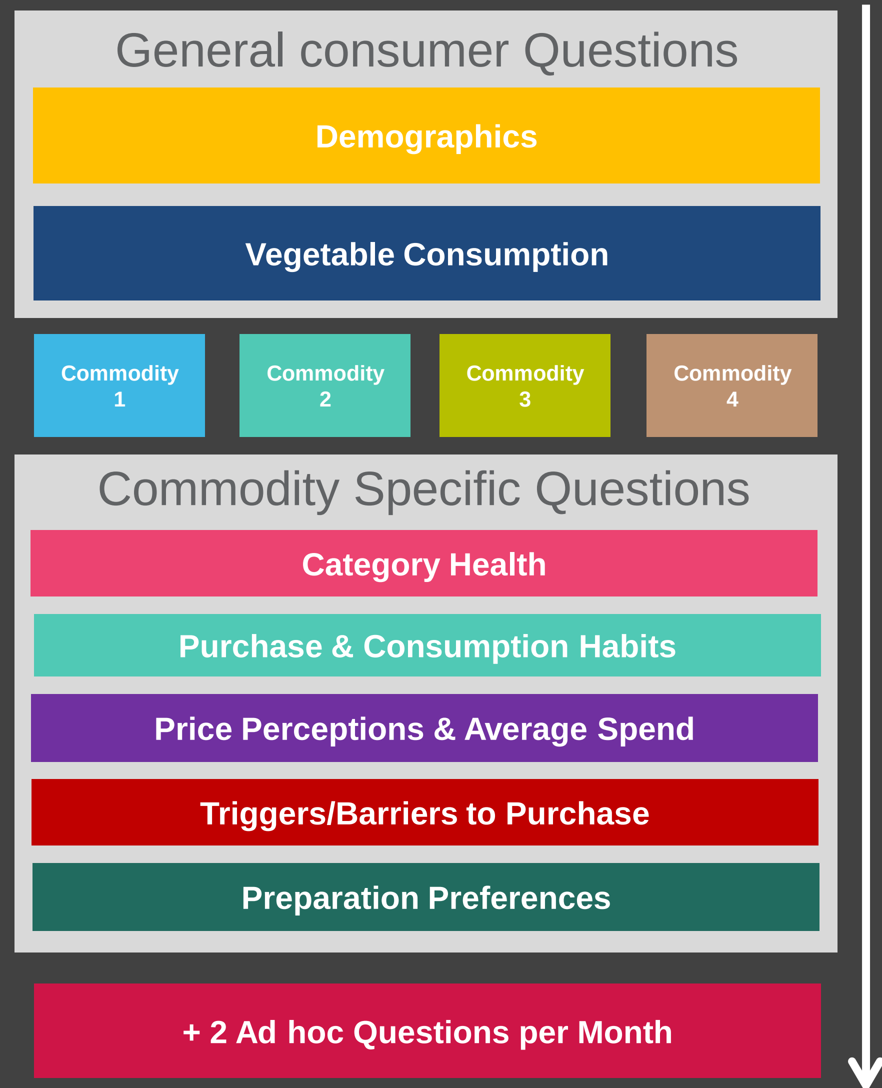
Online Methodology.

- 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 consumers completed general demographic and consumption questions. If consumers purchased any of the specific commodities within the last month they would complete those questions. A minimum of N=500 consumers 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.



Sample.

consumers 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, consumers...

- ⇛ Were aged 18 years and over
- ⇛ Purchased fresh vegetables at least once a month
- ⇛ Purchased at least one of the monthly commodities (broccoli, chilli, lettuce, sweet corn, green peas, kale, leek) within the last month
- ⇛ Were the main or joint grocery buyer.

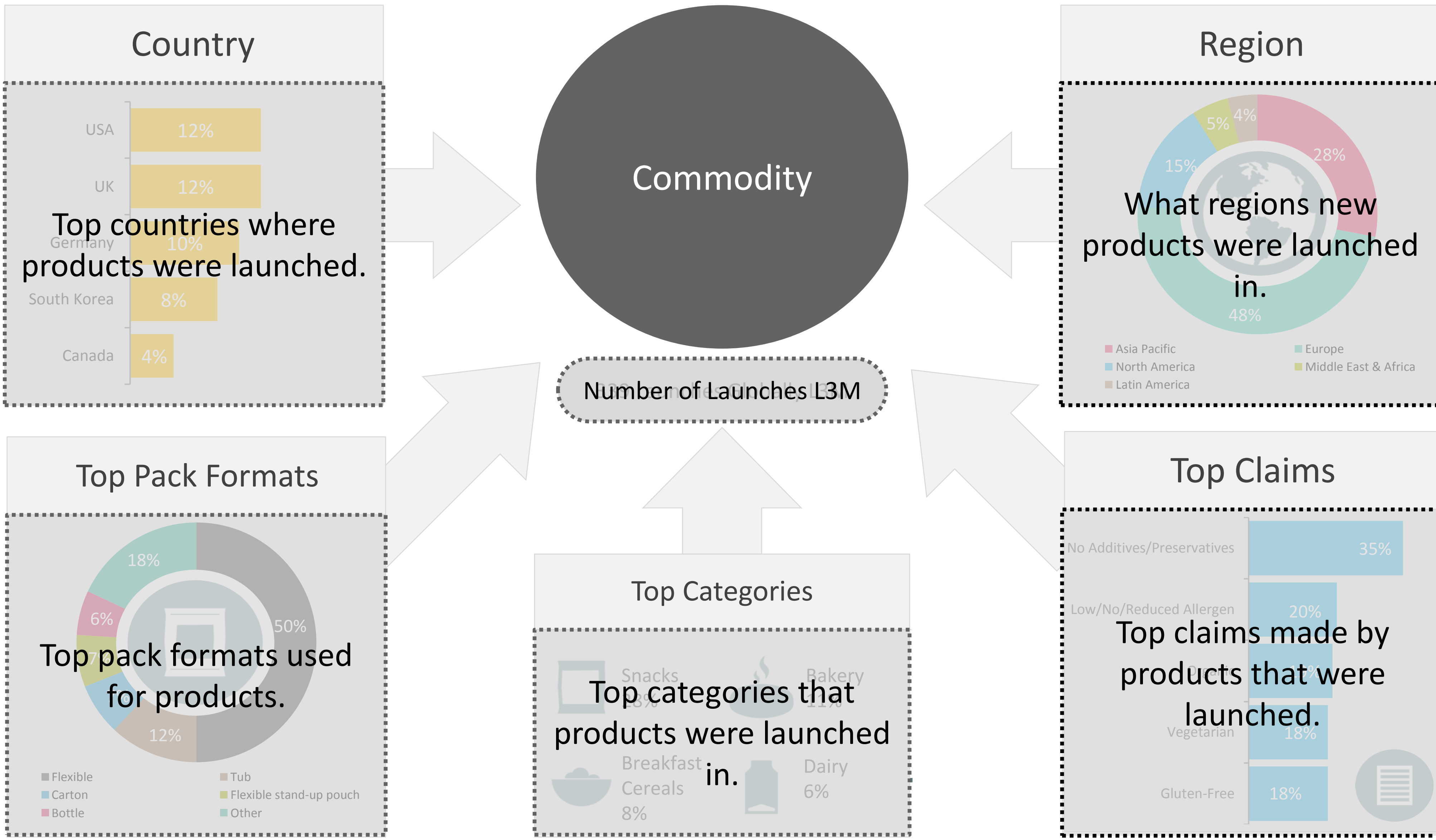
	Broccoli n=302	Chilli n=204	Lettuce n=304	Sweet Corn n=302	Green Peas n=306	Kale n=205	Leek n=204
Gender							
Male	38%	49%	34%	37%	33%	36%	39%
Female	62%	51%	66%	63%	67%	64%	61%
Age							
18-24 y.o.	9%	2%	9%	9%	8%	4%	2%
25-34 y.o.	20%	14%	18%	25%	20%	18%	13%
35-44 y.o.	18%	20%	14%	21%	18%	19%	17%
45-54 y.o.	16%	19%	16%	15%	18%	20%	18%
55-64 y.o.	18%	28%	21%	17%	19%	23%	28%
65+ y.o.	19%	16%	22%	13%	17%	17%	22%
Household							
Single Income no Kids	20%	17%	17%	18%	19%	17%	16%
Double Income no Kids	25%	25%	22%	18%	17%	24%	14%
Young Families	15%	13%	15%	21%	19%	12%	9%
Established Families	19%	23%	18%	25%	24%	20%	28%
Empty Nesters	22%	23%	26%	18%	21%	26%	33%
Location							
New South Wales	22%	17%	22%	25%	27%	18%	13%
Victoria	20%	14%	22%	22%	23%	17%	19%
South Australia	14%	15%	14%	14%	13%	16%	15%
Queensland	19%	15%	20%	19%	17%	15%	15%
Western Australia	18%	18%	16%	14%	16%	14%	15%
Tasmania	3%	14%	4%	3%	2%	14%	18%
Australian Capital Territory	3%	4%	3%	2%	3%	6%	4%
Northern Territory	0%	2%	0%	0%	0%	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.