Project Harvest Monthly Tracker Report.

Wave 31, December 2015

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

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

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Contents

Wave 31:
Executive Summary

Industry Insight

In addition to documenting Australians' consumption of vegetables, the Harvest Tracker has also been recording the key shopping behaviours of our nation. Recently, and for the first time since the inception of the tracker in 2012, we saw Coles increase as a purchase channel over the majority of commodities (with exception to Spring Onion). Conversely, we have observed an overall decrease of Woolworths as the main purchase channel. Recent research waves have also revealed a lower cost for commodities tested (e.g. Zucchini in Sydney and Brisbane; Celery in Brisbane & Adelaide).

These results are consistent with recent mass media that describes the growing dominance of Coles versus the slipping of Woolworths and is a reminder that things can change over time as consumers react to what is on offer from a retailer. In the future, this landscape will continue to change. Apart from value, which Coles appears to be currently winning, what will be the next driver of main store switching?

- Convenience? Note the proliferation of the home delivered meal kits.
- Customisation? Note the increase in pre-prepared formats in store.
- Customer Experience? Note the "highest customer satisfaction" as awarded to Aldi by Canstar Blue and Roy Morgan in 2015.

The lesson of the future for Australian growers may be to be open to considering new and innovative retailers or avenues into consumers homes in order to continue satisfying emerging consumer needs.

Cabbage Grower Action Plan.

Wave 31 Fast Facts

- Consumers are highly satisfied with cabbage and are likely to recommend it to friends and family. Future purchase intent has declined this wave.
- On average cabbage is purchased 3 times per month and consumed on 7 occasions per month. Mainstream retailers are the typical purchase locations.
- Relatively consistent with previous months, consumers typically purchase 1.0kg of cabbage. Consumers perceive cabbage to be good value for money. Individual whole and half cabbages are the preferred formats.
- Overall awareness of cabbage types remains relatively low. The most recalled variety was red/purple, consistent with past waves.
- The key motivations for purchasing cabbage are its ease to cook with and to use as an ingredient in dishes. The main barriers to purchase are already consuming enough, not wanting to waste any and wanting a variety of vegetables.
- Cabbage is expected to remain fresh for approximately 10 days. Expectations of freshness are mostly being met.

6.7/10 is the perceived value for money of cabbages.

1.

Insight:

Cabbage is cooked in Chinese cuisine. This wave sees an increase in carrot as an accompanying vegetable.

Short Term Recommendation:

There is opportunity to expand consumers' cooking outside of Chinese cuisine with recipe ideas and pre-packaged meal kits that contain cabbage and carrots such as cabbage rolls, gyoza and coleslaw.

2.

Insight:

This wave sees an increase in short shelf life as a barrier to purchase as well as a decline in expected longevity of cabbage freshness.

Long Term Recommendation:

Investigate the supply chain from farm to shop to determine any efficiencies that will lead to improved freshness.

Celery Grower Action Plan.

Wave 31 Fast Facts

- Celery continues to perform below average on the majority of category health and consumer sentiment measures, except for satisfaction.
- Celery is purchased three times per month and consumed on average ten occasions per month, relatively consistent with the previous wave.
- Consumers purchase whole bunches of celery. Recalled last spend is $2.70, in line with past months. Overall, celery is perceived to be good value for money.
- Price tracking indicates the average price per bunch of celery in December is $2.47, slightly lower than prices recorded in August 2015 ($2.63).
- Spontaneous awareness of celery types remains very low, with 84% of consumers unable to state a type.
- Top triggers to purchase are health, to use as an ingredient in dishes, and great taste. Limiting waste is the main barrier to purchase.
- Consumers expect celery to remain fresh for nine days, with longevity perceptions remaining consistent over recent waves.

9.9 times per month

is the average number of times consumers are eating celery.

1.

Insight:

Health is a key driver of celery purchase, and there is an increasing number of consumers eating raw celery as a snack.

Short Term Recommendation:

Target health conscious and convenience driven consumers by providing snack formats such as celery stick/batons. There is opportunity to combine with carrots and dip in an on-the-go format.

2.

Insight:

Over one quarter of consumers purchase celery because of the texture. Global launches of a new celery variety have emphasised “snappier” texture and “mild” flavour on pack.

Long Term Recommendation:

Advertising flavour descriptions on pack may encourage greater trial whilst textural descriptions on pack may increase consumption frequency with loyalists.

Cucumber Grower Action Plan.

Wave 31 Fast Facts

- Consumers are generally satisfied with cucumbers, which is above the Vegetable Average.
- Cucumber is purchased on average 4 times per month and consumed around 12 times per month. Purchase is primarily made through mainstream retailers.
- Weight of purchase has declined this wave, with consumers purchasing on average 600g of Cucumber.
- Price tracking of Lebanese cucumbers reveals a national average of $4.56 per kg in December, which is lower than the previous wave ($5.76 per kg in August).
- Recall of cucumber types and varieties improved from the previous wave. Lebanese and Continental/Telegraph types hold the greatest recall.
- Cucumber is expected to stay fresh for just over a week, with expectations generally met.
- Key drivers of purchase are predominately influenced by taste and health. Barriers to purchase are not wanting to waste any and already consuming enough.

600g is the average weight of cucumbers per purchase by consumers.

1.

Insight:

The past few waves have seen a decrease in average weight of purchase and a simultaneous increase in wastage as a barrier to purchase.

Short Term Recommendation:

Inform consumers at the point of purchase on how to store their cucumbers for maximum freshness and longevity.

2.

Insight:

Health benefits of cucumber are a trigger to purchase. Globally, there are a large number of skincare products launched that promote the health benefits of cucumber.

Long Term Recommendation:

Investigate the opportunity to supply cucumbers to the beauty and skincare category as a way of increasing usage outside of food consumption.

Zucchini Grower Action Plan.

Wave 31 Fast Facts

- Zucchini performed below average on the majority of category health and consumer sentiment measures, except for satisfaction.
- Consumers purchase zucchini on average 4 times per month and consume 8 times per month. Key retailers for zucchini purchase remain mainstream and specialist stores.
- Weight of purchase (700g) and recalled last spend ($3.10) remained stable, while value for money (6.1/10) noticeably dropped this wave.
- Zucchini's national average price is notably lower, sitting at $3.30 per kg in December 2015 compared to $5.12 per kg in August 2015.
- Awareness of zucchini types remains very low, with nearly three quarters of consumers unable to name a variety. Those who can are largely prompted by colour.
- Zucchini is expected to remain fresh for just over a week, with expectations of freshness less likely to be met in comparison to previous waves.
- Top triggers to purchase are ease of preparation and to use as an ingredient in dishes. Consumers limit purchase of zucchini because they already consume enough and want to limit waste.

17% of consumers used zucchini when cooking a new recipe.

1.

Insight:

Consumers have been experimenting with alternative cooking styles, including roasting and frying.

Short Term Recommendation:

Provide consumers with recipe ideas in-store that incorporate carrot, onion and potato. Encouraging various cooking styles and dishes will enhance the perceived versatility of zucchini.

2.

Insight:

Value perceptions have noticeably dropped this wave, with expectations of freshness also declining.

Long Term Recommendation:

Manage consumer expectations by providing best before dates, storage instructions and cooking instructions to improve value and freshness perceptions.

Eggplant Grower Action Plan.

Wave 31 Fast Facts

- Eggplant has low importance and satisfaction relative to the Vegetable Average, but holds strong levels of interest, endorsement and future purchase intent.
- Purchase occasions occur approximately three times per month, remaining relatively consistent with the previous wave, whilst eggplants are consumed four times per month. Mainstream and specialist retailers are the main outlets for purchase.
- Consumers purchase 800g of eggplant per shop. Recalled last spent has dropped to $4.00 with value for money perceived as fair.
- Pricing analysis revealed the national average price for purple eggplant is $8.09 in December, which is lower than $9.84 per kg in August 2015.
- Unprompted awareness of eggplant types remains low, with two thirds of consumers unable to recall a type.
- Key influences to purchase are taste, using as an ingredient in dishes and adding variety to their vegetable selection. Key barriers to purchase are wanting variety and already consuming enough for their needs.
- Eggplant is expected to remain fresh for just over a week. This expectation is generally being met.

$4.00 is the average recalled last spend on eggplant in December 2015.

1.

Insight:

Consumers are purchasing eggplant due to its vibrant colour and appeal to the whole family.

Short Term Recommendation:

Advertise eggplant as a family friendly vegetable with recipe ideas such as eggplant chips. Eggplants are colourful and a healthy alternative to regular chips and snacks.

2.

Insight:

Consumers have low awareness of eggplant varieties and importance of provenance is low.

Long Term Recommendation:

Consumers lack knowledge of eggplants. Educate consumers by clearly labelling specific eggplant varieties, provenance and best cooking styles in store and on pack to encourage greater purchase.

Spring Onion Grower Action Plan.

Wave 31 Fast Facts

- Spring onions hold strong importance for consumers. The majority of consumers indicate they intend to purchase the same amount as they currently do.
- Purchase frequency of spring onion occurs 3 times per month and it is consumed on nine occasions per month on average, noticeably higher than the previous wave.
- On average, consumers purchase 400g of spring onion and recalled spending $2.80 on their last shop.
- Analysis of national pricing revealed an average price of $2.19 each. Spring onion is perceived to be fair value for money (6.1/10).
- Awareness of spring onion varieties is very low, with 82% unable to recall a type.
- The primary triggers to purchase are to use as an ingredient and great taste. Limiting waste remains the main barrier to purchase.
- Consumers expect spring onion to remain fresh for over a week, and this longevity is likely to be met most of the time.

60% of consumers purchase spring onion to complement other food.

1.

Insight:

Consumers are willing to use spring onion in new recipes. However, it is mainly being used as an ingredient in dishes to complement other food.

Short Term Recommendation:

Consumers are comfortable experimenting with spring onion. Investigate new product opportunities that hero the spring onion, such as dressings and sauces – big flavours will appeal to these cooks.

2.

Insight:

Global trends show a large percentage of spring onion snack products being launched in the last three months.

Long Term Recommendation:

Capitalise on the growth of the snack category in Australia by investigating spring onion New Product Development (NPD) snack products such as spring onion savoury crackers, dips and spring rolls.

Radish Grower Action Plan.

Wave 31 Fast Facts

- Importance and satisfaction for radish are below the Vegetable Average. However, there are high levels of endorsement, interest and future purchase intent.
- Radishes are purchased on average three times per month and consumed nine times per month. Purchase is primarily from mainstream retailers and specialist retailers.
- On average consumers are purchasing 500g of radish. Recalled last spend was $3.00, with value for money perceived to be fair (6.3/10). This is relatively consistent with the previous wave.
- Price tracking revealed an average price of $3.44 per bunch in December, higher than prices tracked August 2015 ($2.70 per bunch).
- Awareness of radish types is very low, with two-thirds of consumers unable to recall a type.
- The main motivations for purchasing radish are the taste and adding variety. Already consuming enough and limiting waste are the key barriers to purchase.
- Radish is expected to stay fresh for just over a week. Expectations of freshness are more likely to be met most of the time in comparison to the last wave.

$3.44 per bunch

was the average price of radishes in December 2015.

1.

Insight:

Taste has significantly increased as a trigger to purchase in this wave.

Short Term Recommendation:

Appeal to Eager Explorer and Flavour Follower consumers by providing clear flavour descriptors in-store and on-pack. Recipe ideas will help consumers experiment with radish outside of salad dishes.

2.

Insight:

Globally, radish is used to add colour to products and meals including gum, confectionary and skincare products.

Long Term Recommendation:

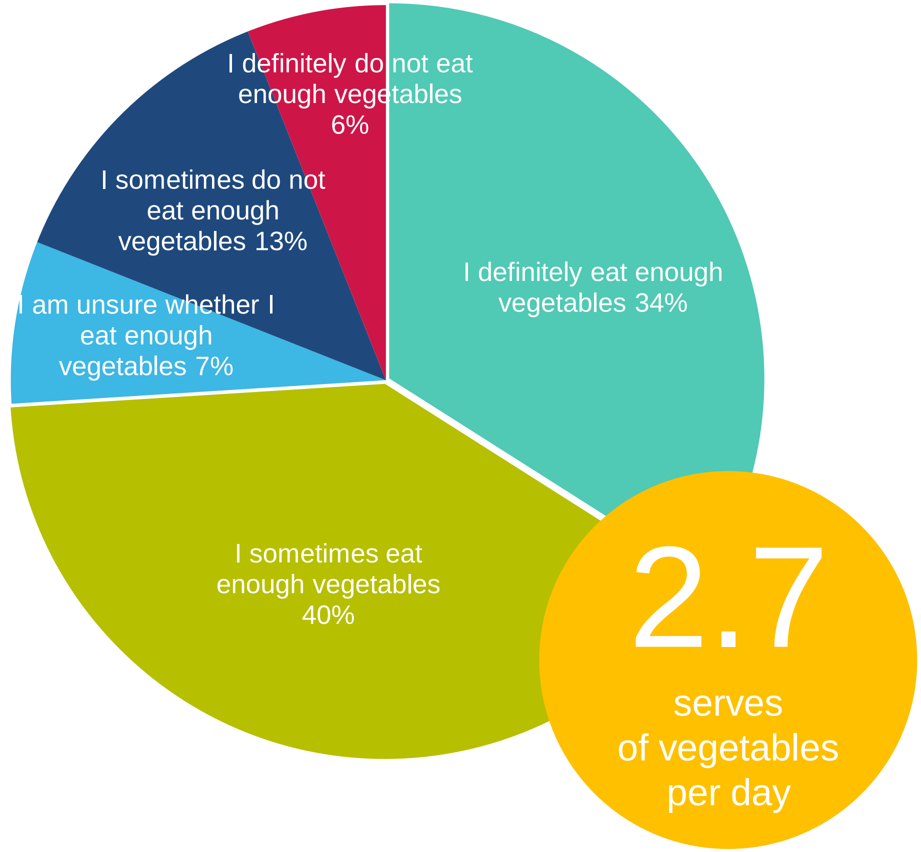
Investigate the opportunity to export radishes to countries such as South Korea and Germany. These markets have a larger number of NPD launches outside of fresh produce.

Wave 31:
Response to Ad hoc Questions

Average Vegetable Consumption.

The majority of consumers believe they definitely or sometimes eat enough vegetables each day.

Overall, consumers are eating 2.7 serves of vegetables per day. This has slightly increased from 2.5 serves in February 2014. However, this is still well below the recommended number of serves per day (n=5)*.



AHQ1 Do you feel that you eat enough vegetables in your everyday?
AHQ2 On average, how many serves of vegetables do you consume per day?
Adults are recommended to consume 5-6 serves of vegetables per day.
Serving sizes and recommended intake as per eatforhealth.gov.au
Base: N=665

Average Vegetable Consumption.

Young females are consuming well below the recommended number of vegetable servings per day.

Definitely eat enough vegetables	Sometimes eat enough vegetables	Unsure whether eat enough vegetables	Sometimes do not eat enough vegetables	Definitely do not eat enough vegetables
3.4 serves	**2.6** serves	**1.8** serves	**2.0** serves	**1.5** serves
These consumers are more likely to be male, aged 55+, and in an empty nester household.	These consumers are more likely to be aged 18-24 and 45-55, young families, living in VIC.	These consumers are more likely to be male, aged 18-44, single income households, living in WA.	These consumers are more likely to be female, aged 18-34, single or double income households, living in NSW, SA and WA.	These consumers are more likely to be female, aged 18-34, and 45-54, single, double income or young families, living in NSW, and SA

AHQ1 Do you feel that you eat enough vegetables in your everyday?
AHQ2 On average, how many serves of vegetables do you consume per day?
Base: N=665

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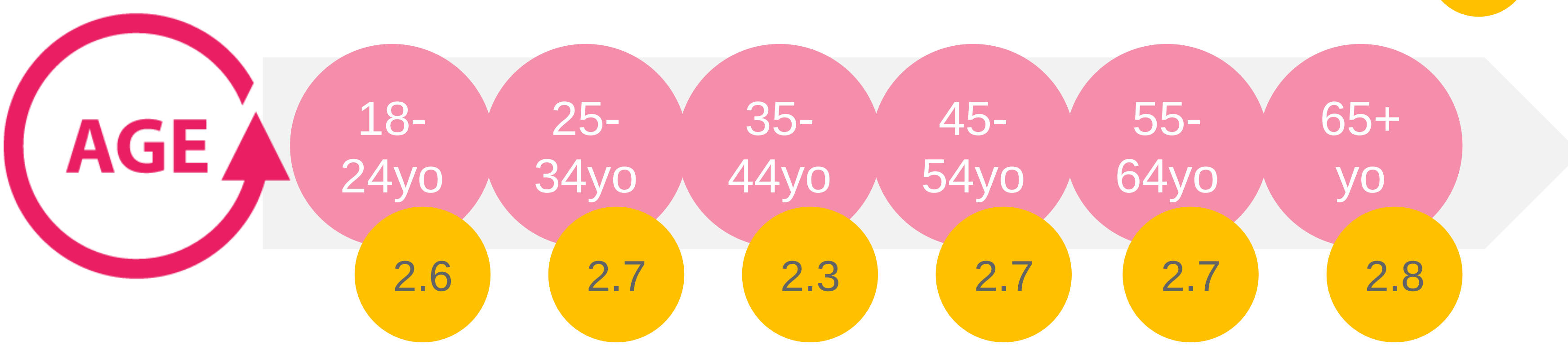
Average Vegetable Consumption.



AHQ2 On average, how many serves of vegetables do you consume per day?
Base: N=665

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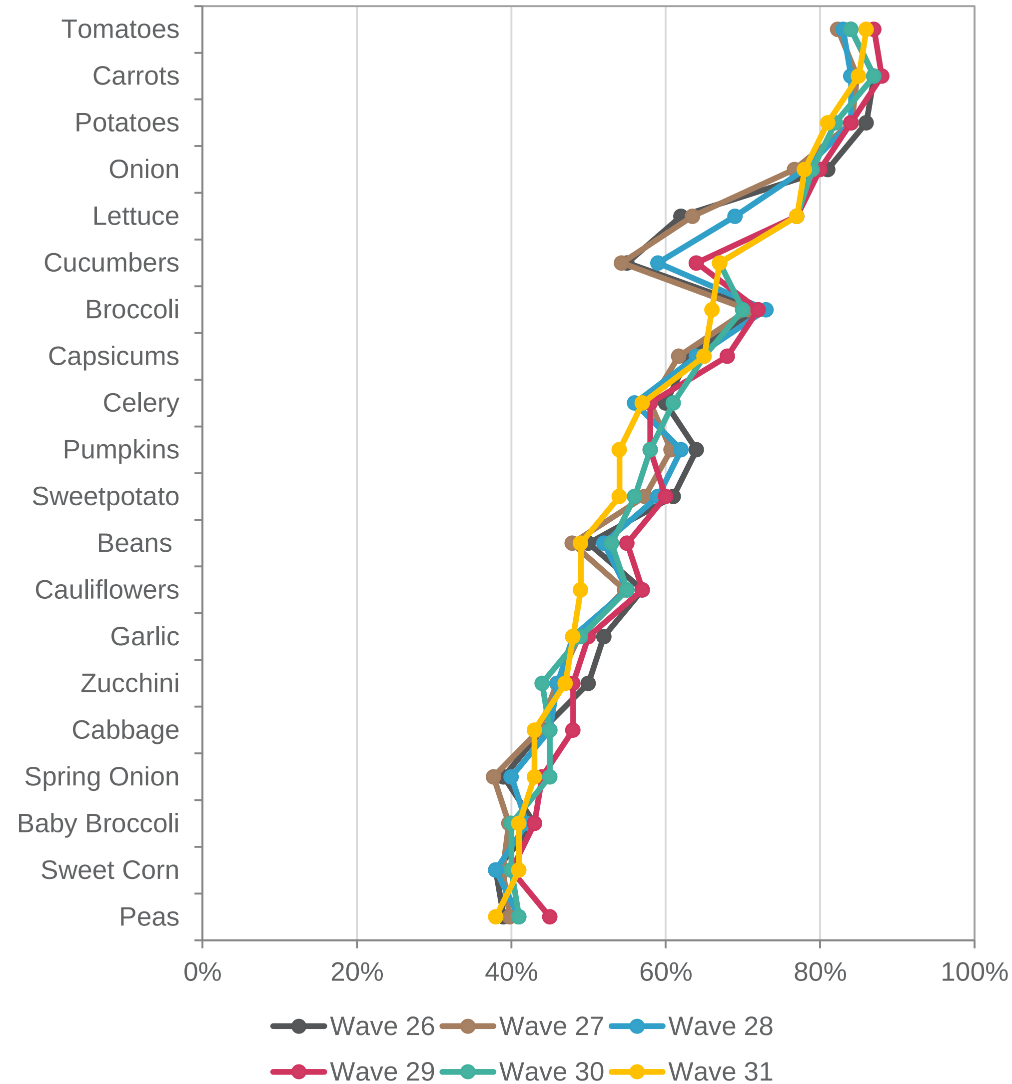
Wave 31: Overall Vegetable Tracking

Vegetables
Purchased Last Month

- Tomatoes, carrots, potatoes and onion are the most purchased vegetables in December.
- Purchase of fresh vegetables is relatively consistent to previous months.



Sample Wave 31, N=913
S8. Which of the following fresh vegetables have you purchased in the last month?

Category Health Explained

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

The Vegetable Average is the average of all commodities tracked thus far.

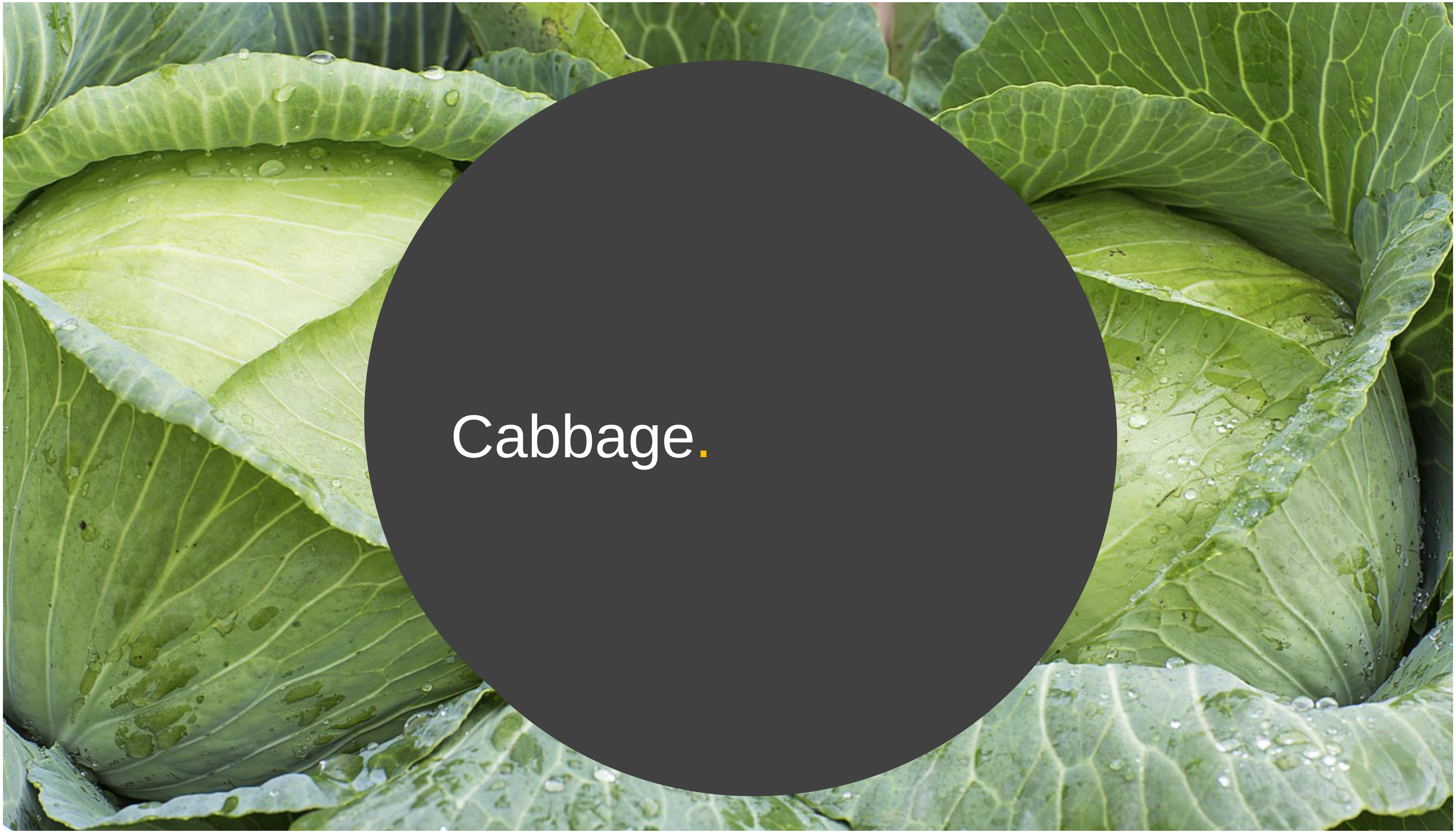
- How **important** to you is having a range of *commodity* available in the store where you usually shop?
- How **satisfied** or dissatisfied are you with the range of *commodity* currently available?
- How likely would you be to **recommend** *commodity* to your family and friends?
- How interested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

Category health and consumer sentiment remain relatively strong, specifically for satisfaction.

Both eggplant and radish have strong future purchase intent, which is consistent with the previous wave.

	Cabbage	Celery	Cucumber	Zucchini	Eggplant	Spring Onion	Radish	Vegetable Average
Importance	6.6	5.8	6.3	6.2	5.7	6.7	6.1	6.3
Satisfaction	7.0	6.9	6.9	6.7	6.3	6.6	6.2	6.6
Endorsement	6.7	6.6	6.9	6.8	7.1	6.8	7.0	6.9
Interest (New Varieties)	6.2	5.6	6.0	6.1	6.4	6.2	6.9	6.3
Future Purchase								
More	13%	11%	14%	14%	19%	11%	19%	16%
Same	86%	87%	85%	83%	80%	89%	81%	83%
Less	2%	1%	2%	3%	1%	0%	0%	1%

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



Cabbage.

The past three waves have seen an increase in purchase and consumption frequency of cabbage.

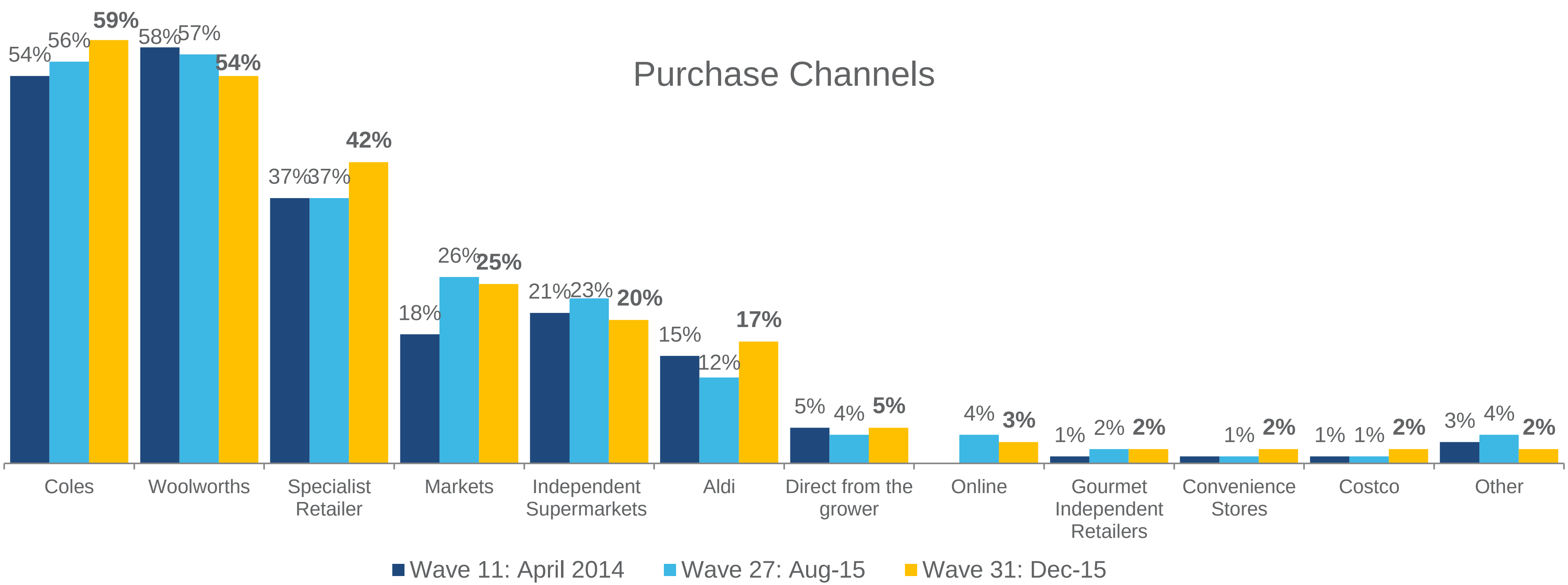
Cabbage is most likely to be purchased from mainstream and specialist retailers. Purchase from Aldi has noticeably increased this wave.

Average Purchase **3.5** times per month

▼ 2.6 times, Wave 11
▼ 3.4 times, Wave 27

Average Consumption **7.7** times per month

▼ 6.3 times, Wave 11
▼ 7.6 times, Wave 27



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 11 N=304 , Wave 27 N=301, Wave 31 N=306

▼: 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 **1.0kg** of Cabbage, which is consistent with previous months.

- ▼ 1.0kg, Wave 11
- ▲ 1.1kg, Wave 27

Recalled last spend

The average recalled last spend was **$3.00** in December 2015, in line with past waves.

- ▼ $2.70 Wave 11
- ▲ $3.20, Wave 27

Value for money

On average, consumers perceived Cabbage to be good value for money **(6.7/10)**, which is consistent with August 2015.

- ▼ 6.3/10, Wave 11
- ▲ 6.8/10, Wave 27

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 11 N=304 , Wave 27 N=301, Wave 31 N=306

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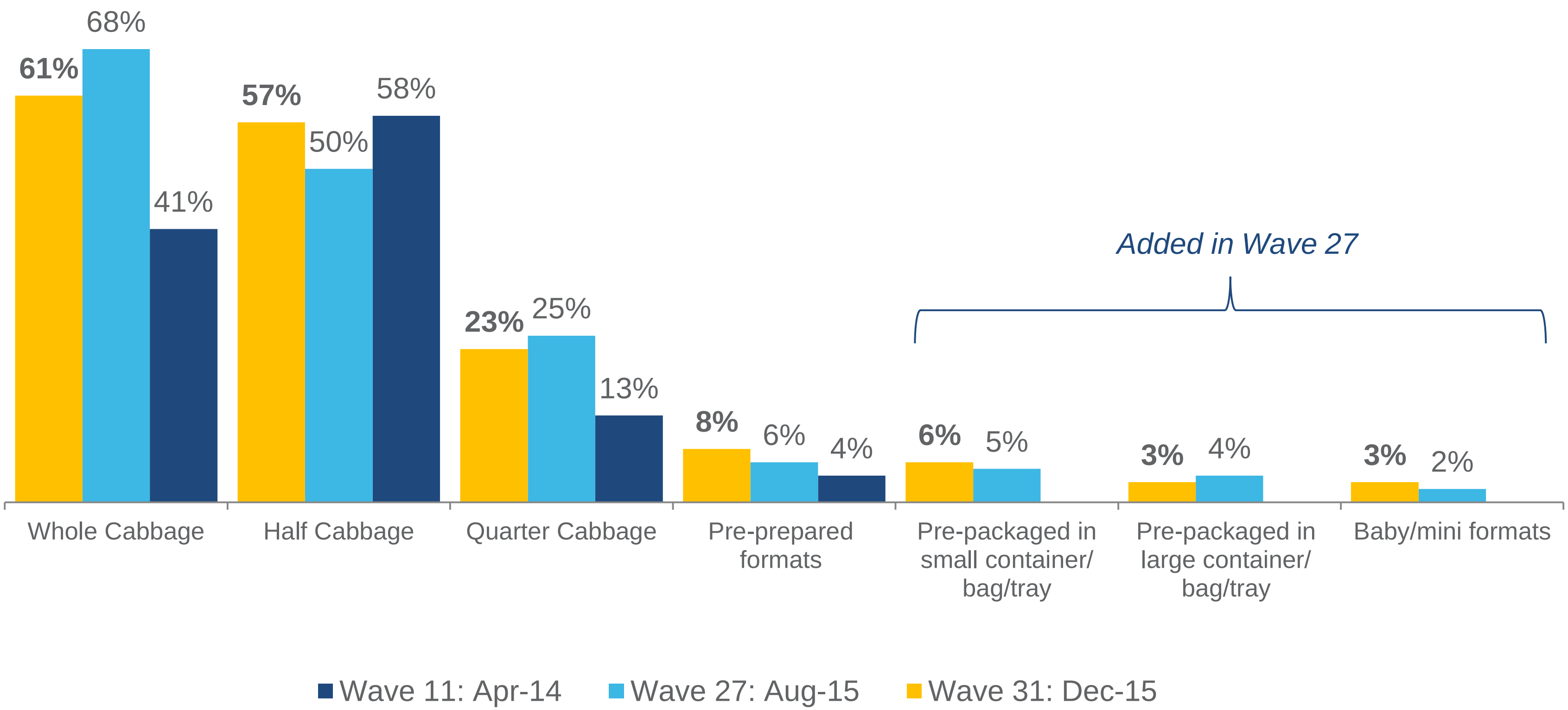
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Whole and half cabbages are the predominant formats purchased.

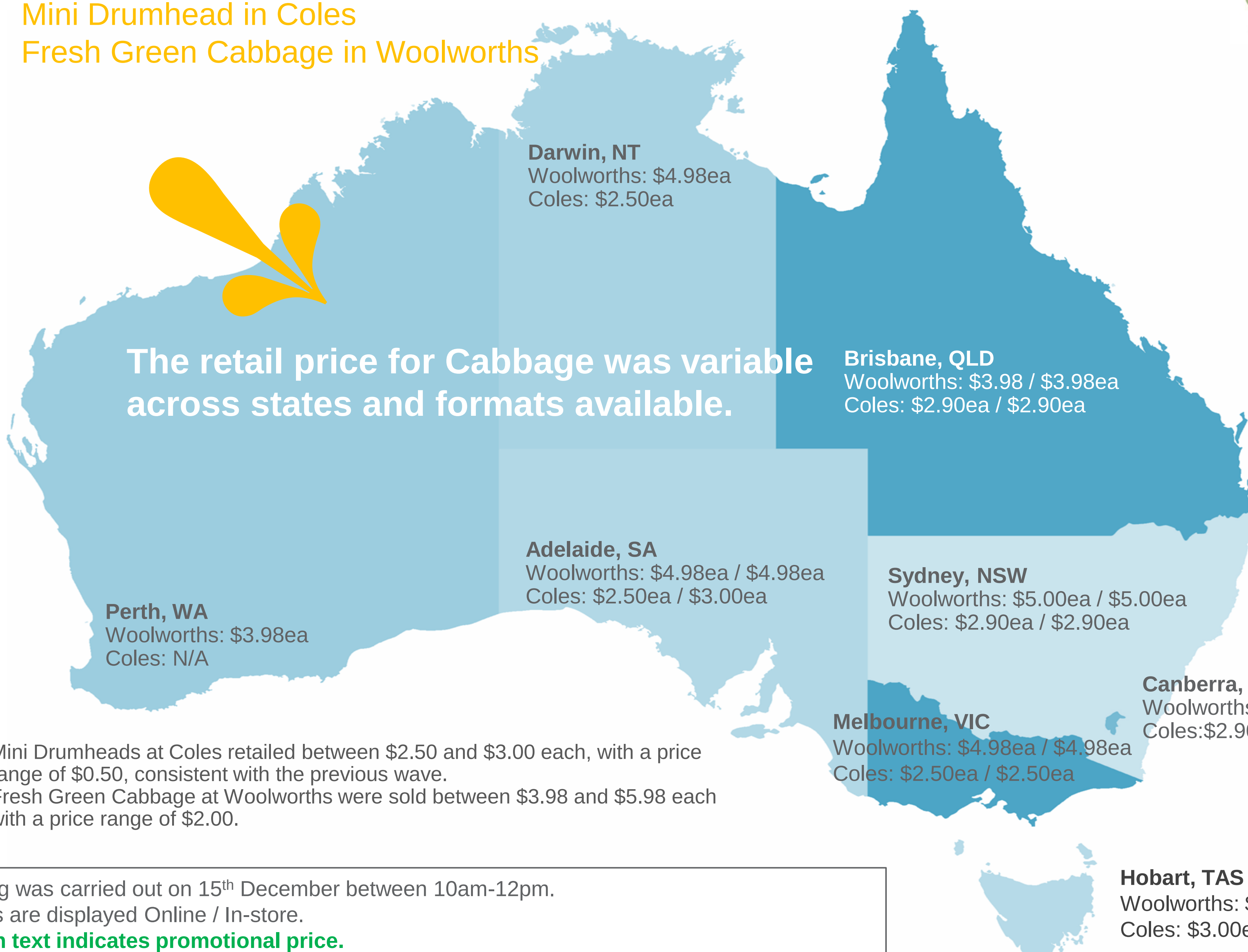
There has been an increase in pre-prepared formats over the past months.



Q4b In what fresh formats do you typically purchase Cabbage?
Sample Wave 11 N=304 , Wave 27 N=301, Wave 31 N=306

Online and In-store Commodity Prices

Mini Drumhead in Coles
Fresh Green Cabbage in Woolworths



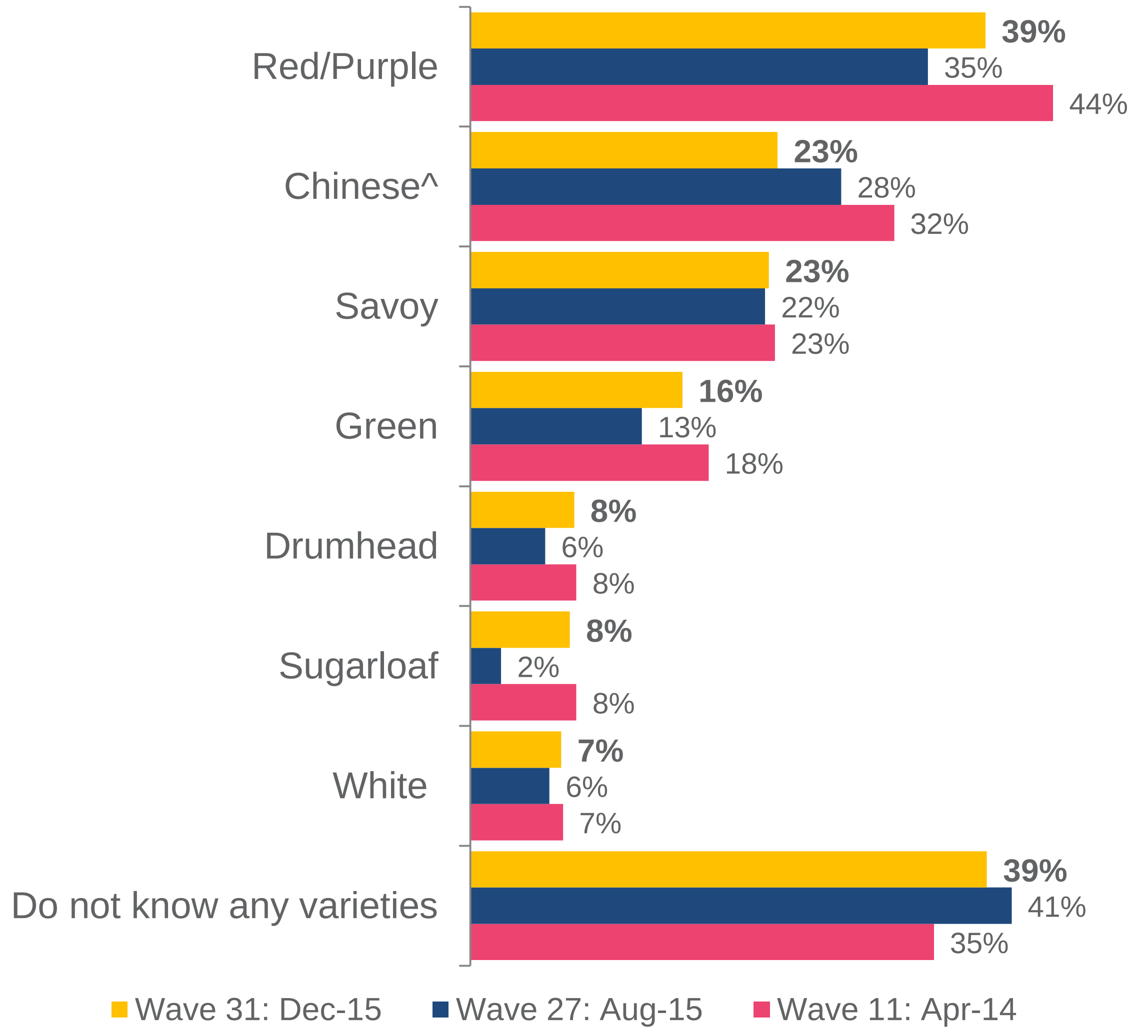
- Mini Drumheads at Coles retailed between $2.50 and $3.00 each, with a price range of $0.50, consistent with the previous wave.
- Fresh Green Cabbage at Woolworths were sold between $3.98 and $5.98 each with a price range of $2.00.

Pricing was carried out on 15th December between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates promotional price.

Spontaneous Awareness

39% of consumers were unable to recall a type of cabbage.

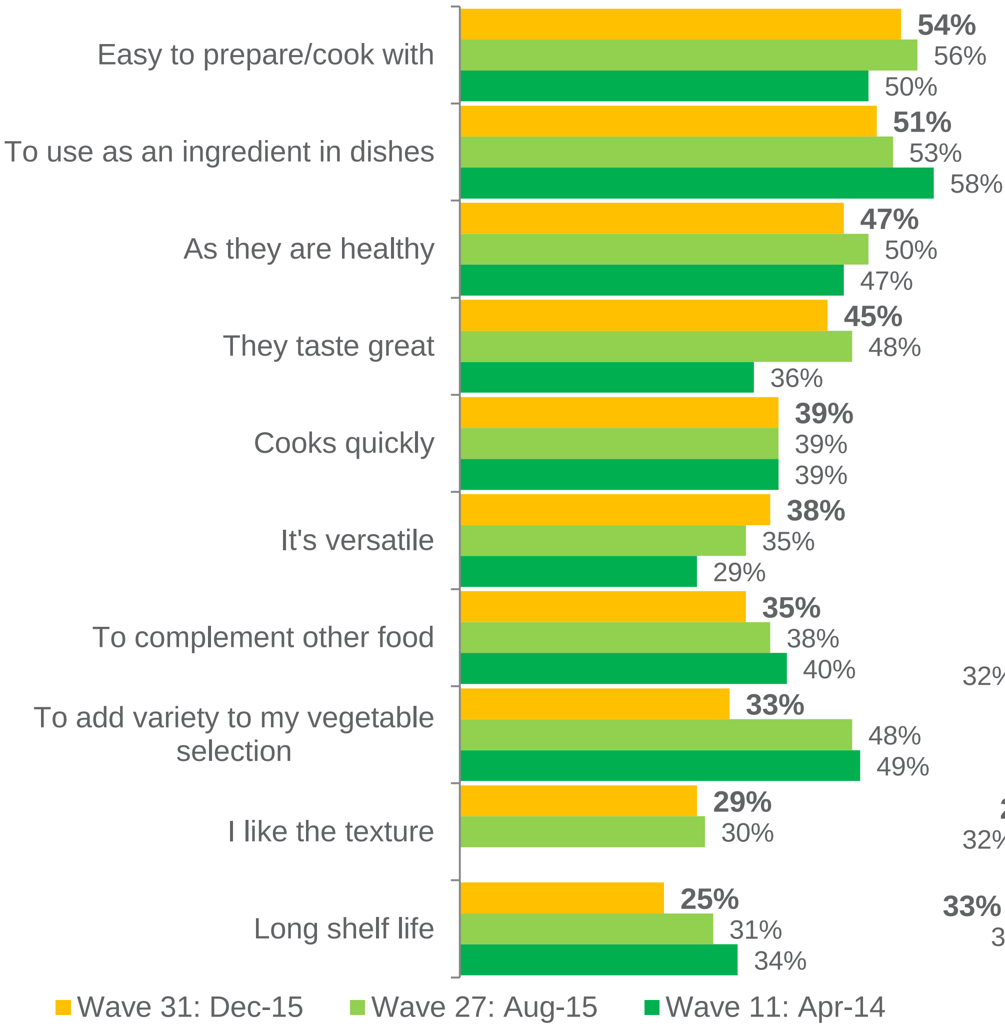
Red/Purple varieties remained the most recalled type of cabbage. There has been a continuous decrease of Chinese cabbage (Wombok) being recalled over the last three waves.



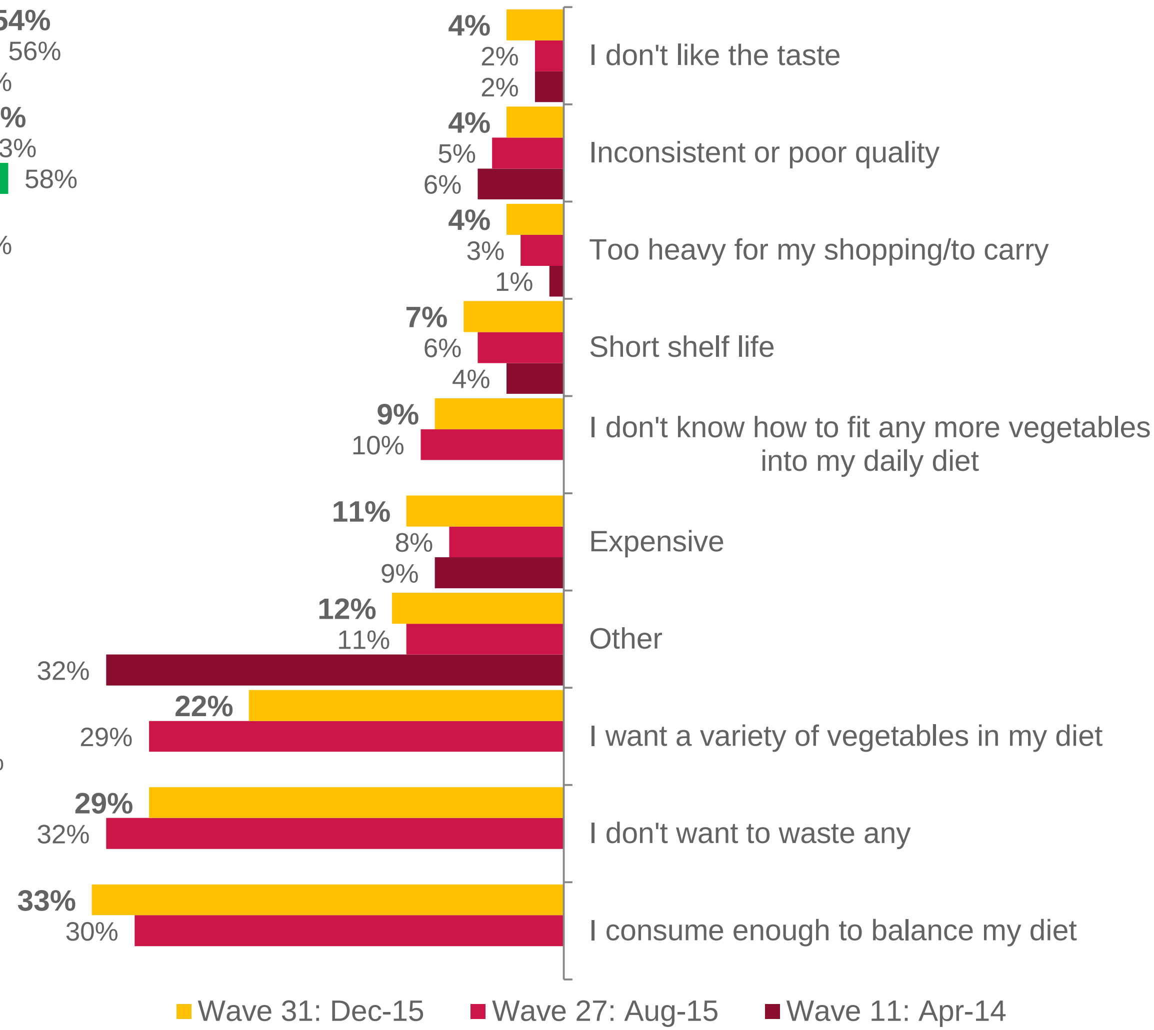
Q6a. What varieties of <commodity> are you aware of? (unprompted)
^Chinese cabbage (Wombok) is recalled as a type of cabbage but is a different species than ‘standard’ cabbage
Sample Wave 11 N=304 , Wave 27 N=301, Wave 31 N=306

Ease of preparation and to use as an ingredient are the main drivers to consumers purchasing cabbage, while consuming enough to balance their diet and not wanting to waste any are the main barriers to inhibiting purchase. This wave has seen an increase in expense and short shelf life as barriers.

Triggers



Barriers



Q7. Which of the following reasons best describes why you purchase <commodity>?
Q8. Which reason best describes why you don't buy <commodity> more often?
Sample Wave 11 N=304 , Wave 27 N=301, Wave 31 N=306

Chinese cuisines are popular when cooking cabbage dishes.

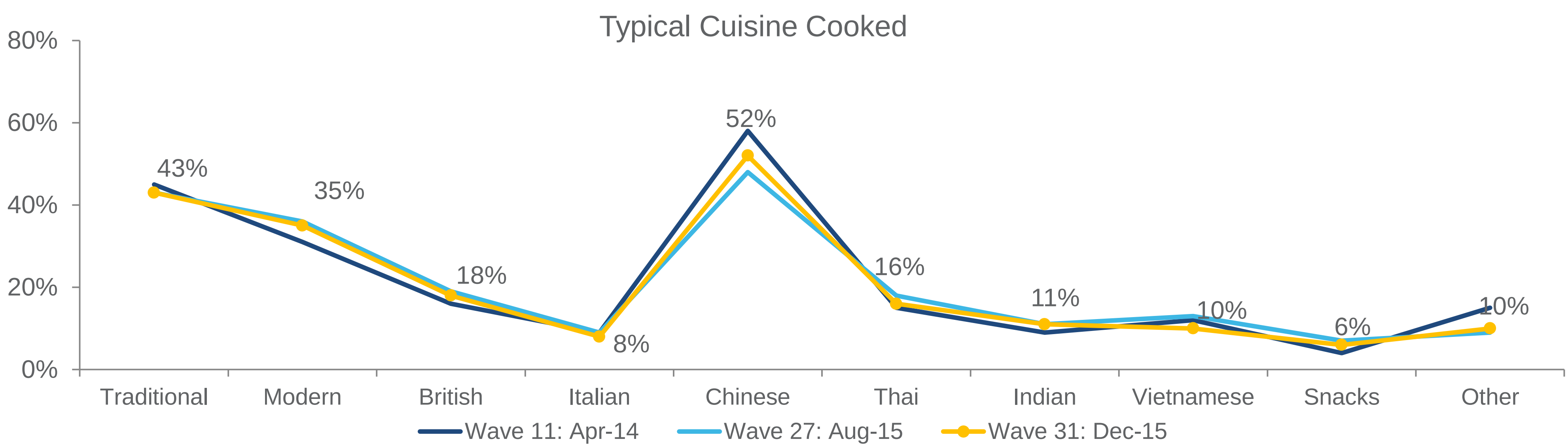
Consumption occasions and cuisine styles have remained relatively consistent over past waves.

Top 5 Consumption Occasions

	Wave 27	Wave 31
Dinner	72%	**73%**
Family Meals	57%	**58%**
Weekday Meals	47%	**45%**
Quick Meals	37%	**42%**
Weekend Meals	40%	**37%**

15% used cabbage when cooking a new recipe

▼ 13%, Wave 27



Australian | European | Asian | Other Cuisines

Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?
Sample Wave 11 N=304 , Wave 27 N=301, Wave 31 N=306

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

There has been a large increase in serving cabbage with carrots this wave.

Nearly half of all consumers eat cabbage raw, up from August 2015. This may be due to warmer weather and the increase in salad consumption.

Accompanying Vegetables

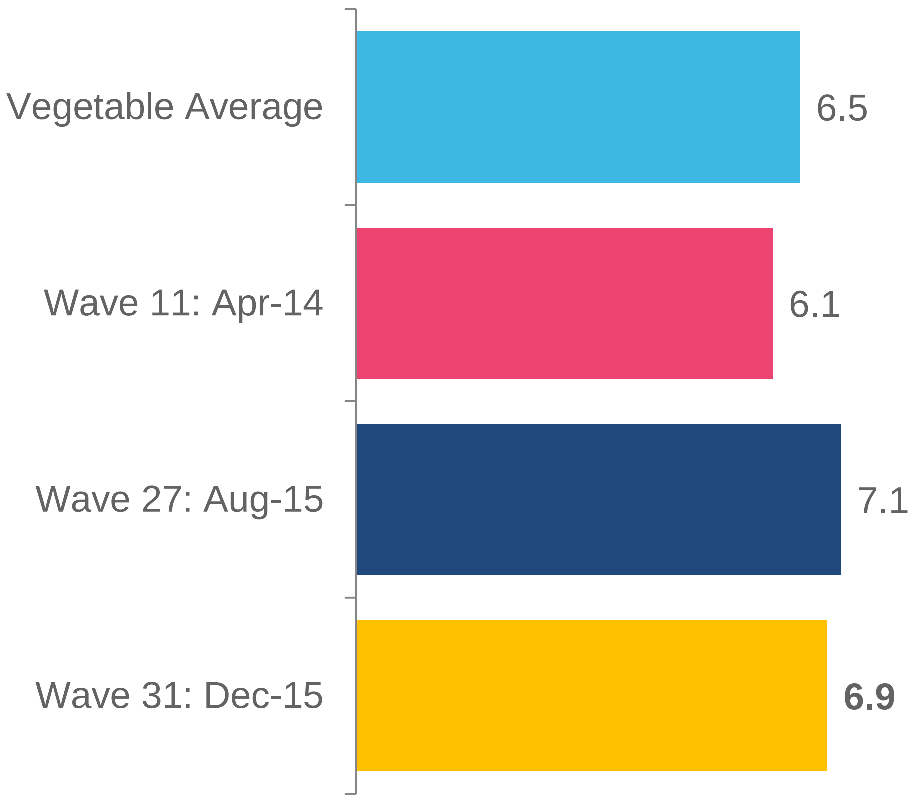
Carrot	67%
Onion	47%
Potato	42%
Capsicum	32%
Broccoli	24%

Top Cooking Styles

	Wave 27	Wave 31
Stir frying	62%	**58%**
Raw	41%	**48%**
Steaming	39%	**43%**
Boiling	28%	**31%**
Sautéing	25%	**24%**
Soup	30%	**23%**
Frying	20%	**17%**
Slow cooking	18%	**17%**
Microwave	10%	**9%**
Roasting	4%	**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 11 N=304 , Wave 27 N=301, Wave 31 N=306

Importance of provenance has remained relatively stable this month, and continues to be key to consumers, especially cabbage grown in Australia.



7.9

Q14. When purchasing <commodity>, how important is Provenance to you?
Q15. And when purchasing Cabbage, how important is that it is grown in Australia?
Sample Wave 11 N=304 , Wave 27 N=301, Wave 31 N=306

Longevity and expectations of freshness have both declined this month.

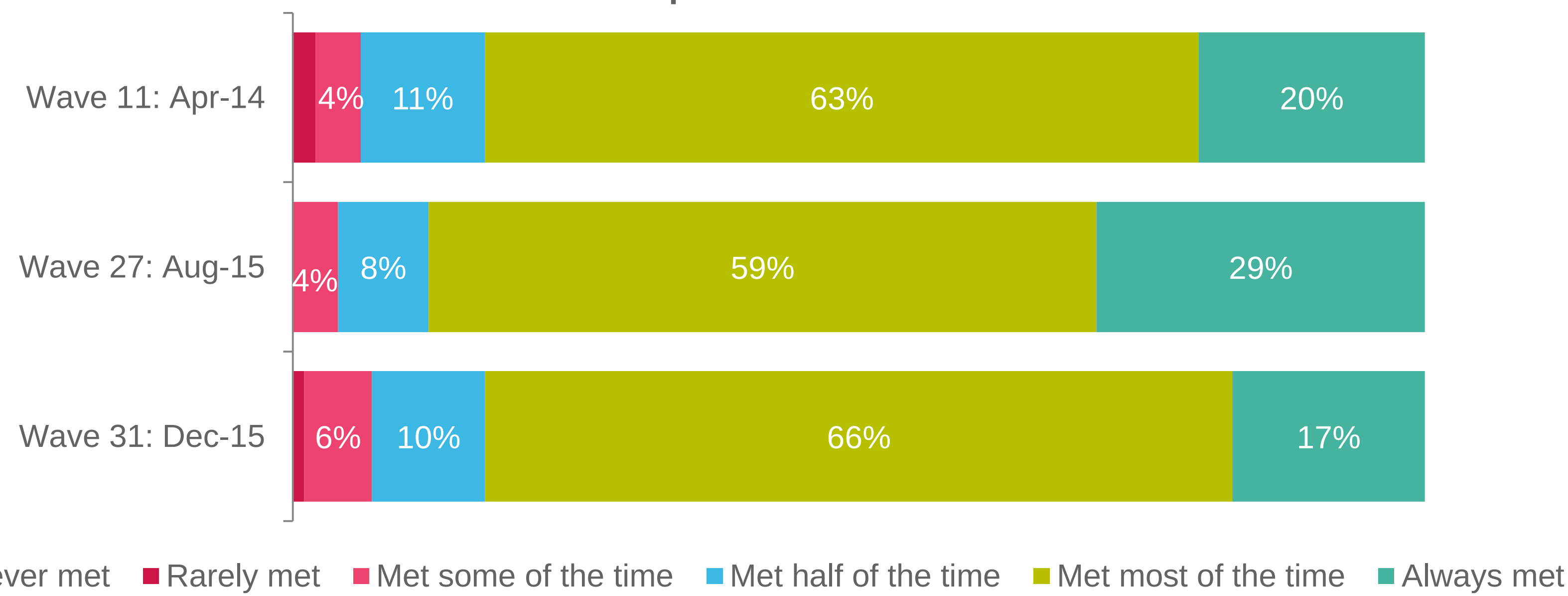
However, cabbage is still expected to remain fresh for 10 days once purchased.

Expected to stay fresh for **9.8** days

▲10.9 days, Wave 11

▲10.7 days, Wave 27

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 11 N=304 , Wave 27 N=301, Wave 31 N=306

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

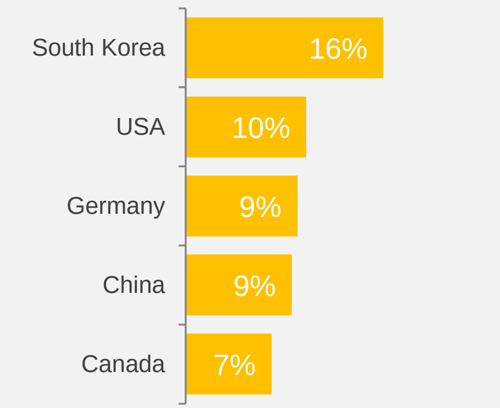
Trends: Cabbage

Cabbage Global NPDs

October – December 2015

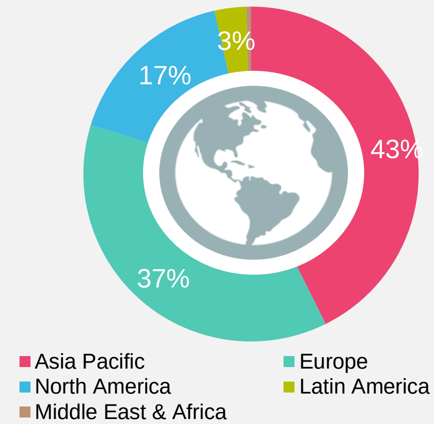
There were 429 global launches of products containing Cabbage as an ingredient. The majority of launches occurred in Asia Pacific and Europe. No additives/preservatives and ease of use claims were common with products launched. The most commonly launched product were meals and snacks, consistent with previous waves.

Country

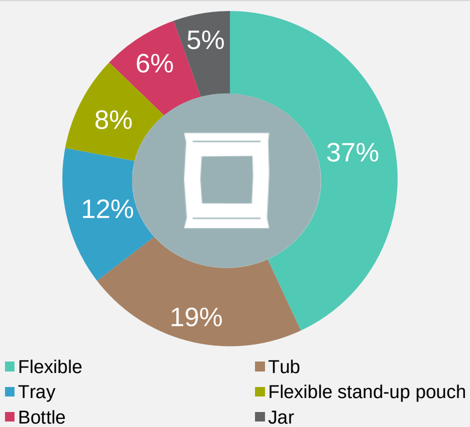


429 Global Launches

Region



Top Pack Formats



Categories

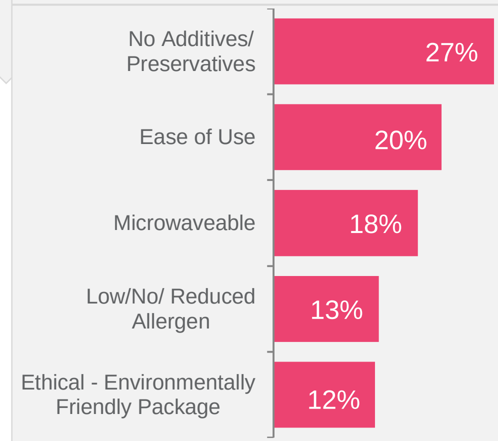
Meals 42%

Snacks 16%

Sauces & Seasonings 12%

Fruit & Vegetables 6%

Top Claims



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

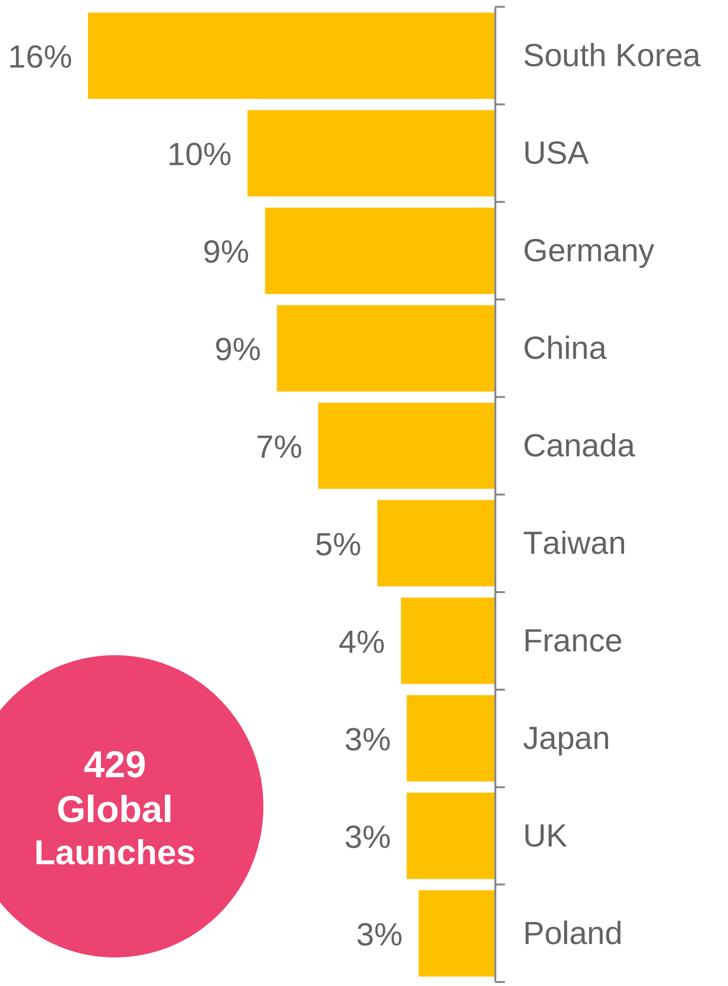
- There were 429 products containing cabbage as an ingredient that were launched globally. This was slightly higher than the number of launches in the previous wave.
- There were twelve Australian launches generally consisting of dumplings, soups and stock.
- Asia Pacific (43%) and Europe (37%) were the dominant launch regions for cabbage products. Whilst South Korea and USA were the main countries for launches.
- A large proportion of products launched were meals and meal centres (42%). Snacks (16%) and sauces and seasonings (12%) were also common categories for products.
- No additives/preservatives was the top claim utilised (27%). Convenience claims were also common, including ease of use (20%) and microwaveable (18%).
- The most innovative product launched was Pad Thai Spring Rolls in Canada (see following pages).

Source: Mintel (2015)

Cabbage Launches
Country & Categories

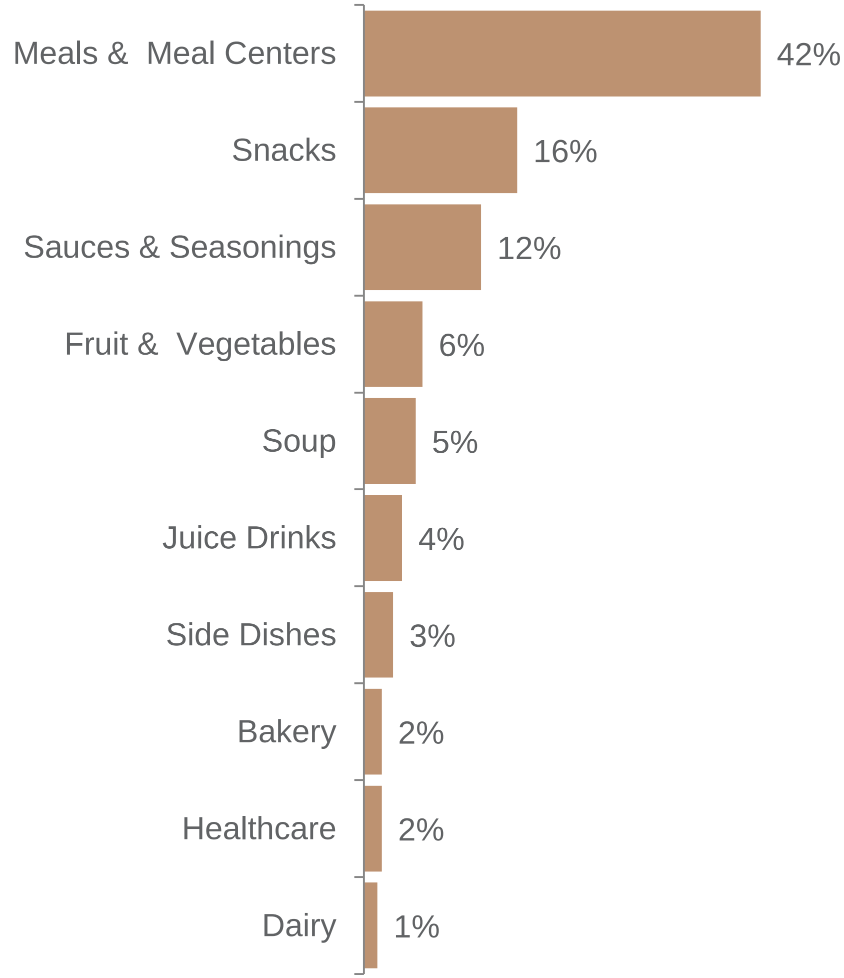
- Meals and meal centers remained the top launch category for cabbage products.
- South Korea, USA and Germany were the main countries for products launched.

Top 10 Launch Countries



429 Global Launches

Top 10 Launch Categories



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

Pack Formats Used

Global	Flexible	37%
	Tub	18%
	Tray	11%
Asia Pacific	Flexible	52%
	Tub	14%
	Flexible Stand-Up Pouch	8%
Europe	Tub	26%
	Flexible	23%
	Tray	19%

Top Claims Used

Global	No Additives/Preservatives	26%
	Ease of Use	20%
	Microwaveable	15%
Asia Pacific	No Additives/Preservatives	26%
	Ease of Use	19%
	Time/Speed	15%
Europe	Microwaveable	24%
	No Additives/Preservatives	23%
	Ease of Use	18%

Only regions with n >30 are displayed

Innovative Cabbage Launches:
L3M (October – December 2015)

Délio Red Beetroot Salad (Belgium)

Délio Salade Betteraves Rouges (Red Beetroot Salad) is now available. This product retails in a 300g pack.

Claims:
N/A

Sajo Daerim Sun AnsimOri Marinated Duck (South Korea)

Sajo Daerim Sun AnsimOri Marinated Duck is made with Sajo premium duck meat with an Air Chilling system, and contains vegetables and glass noodle. This product retails in a 500g pack bearing the HACCP logo.

Claims:
Premium

Home Plus Assorted Fish Cake & Soy Sauce (South Korea)

Home Plus Assorted Fish Cake & Soy Sauce consists of grade A Alaskan pollack that is free from wheat flour, potassium sorbate, glucono-delta-lactone and monosodium L-glutamate. It can be simply prepared in a microwaveable. The product retails in a 250g easy-open pack bearing the HACCP logo.

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

Marie Ma Formule Midi! Coleslaw, Red Pesto Chicken Farfalle & Chocolate Dessert (France)

Marie Ma Formule Midi! Salade Coleslaw + Poulet Pesto Rosso et Farfalles + Entremet Chocolat (Coleslaw, Red Pesto Chicken Farfalle & Chocolate Dessert) is now available. This product comprises a coleslaw starter, described as a cabbage and carrot salad seasoned with a mustard sauce, a microwaveable main course consisting of farfalle pasta with chicken and red pesto; and a chocolate dessert.

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

Source: Mintel (2015)

Innovative Cabbage Launches:
L3M (October – December 2015)

President's Choice World of Flavours Pad Thai Spring Rolls (Canada)

President's Choice World of Flavours Pad Thai Spring Rolls have been relaunched with a new brand name. Previously available under the President's Choice range, this fully cooked product comprises a savoury-sweet combination of rice vermicelli, bean sprouts and vegetables, seasoned with tamarind and oyster sauce, in a crispy wrapper, which can be served with the included Thai chili sauce. It is free form artificial flavours and colours, and retails in a 574g pack containing 24 units.

Claims:
No Additives/Preservatives

Waitrose British Chicken Hotpot (UK)

Waitrose British Chicken Hotpot is a cooked marinated chicken breast in a rich gravy with carrot, cabbage and swede topped with slices of roasted potato. The microwaveable and freezable product provides one of the five-a-day, and is made with chicken from carefully selected British farms. It retails in a 400g partly recyclable pack.

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

Palmeta Cabbage Salad with Yogurt (Czech Republic)

Palmeta Zelný Salát s Jogurtem (Cabbage Salad with Yogurt) is new to the range. This product is made to a traditional recipe with selected ingredients and retails in a 150g pack.

Claims:
N/A

Fuego Burger Sauce (Germany)

Fuego Burger Sauce is a classic burger sauce containing gherkin and white cabbage. It is said to provide a real taste experience and is suitable for grilled sandwiches or as a dip. This product retails in a 290ml bottle.

Claims:
N/A

Source: Mintel (2015)

Innovative Cabbage Launches:
L3M (October – December 2015)

Bard Frische Kuche Pork Steak Gyros with Herb Butter (Germany)

Bard Frische Kuche Steaktaschen Gyros mit Kräuterbutter (Pork Steak Gyros with Herb Butter) is cut from pork loin and stuffed with white cabbage, herb butter and cream. This exclusive marinated product retails in a 0.365kg pack, which includes an oven-ready tray.

Claims:
N/A

Samlip Moon's Blueberry & Cream Bread (South Korea)

Samlip Moon's Blueberry & Cream Bread is said to feature a harmony of fresh blueberry and soft sweetened condensed milk cream. This product retails in a 75g pack featuring the Line Friends graphics and a collectible sticker.

Claims:
Social Media, Event Merchandising, Children (5-12)

Powerful Aloe Vera & Strawberry Flavoured Drink (Germany)

Powerful Aloe Vera & Strawberry Flavoured Drink is now available. It is halal certified and retails in a 240ml pack. This product was on display at the Anuga 2015 Trade Show in Cologne, Germany.

Claims:
Halal

Fitizen Multiple Enzymes Tablets (Taiwan)

Fitizen Multiples Enzymes Tablets are made using first concept of yeast, 80 enzymes, and lactobacterias. They are claimed to help promote bowel movement and keep healthy digestion system. This product retails in a 19.8g pack containing 33 x 600mg tablets. According to the on-pack instruction, this product is recommended to take one to two tablets each day.

Claims:
Botanical/Herbal, Digestive (Functional)

Source: Mintel (2015)

Australian Cabbage Launches:
L3M (October – December 2015)

Woolworths Select Green Curry Rice Balls

Woolworths Select Green Curry Rice Balls are free from artificial preservatives, colours, flavours, and added MSG. They retail in a 320g recyclable pack displaying the 2.5 Health Star Rating symbol.

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

7Chefs Oriental Kitchen Singapore Prawn Noodles

7Chefs Oriental Kitchen Singapore Prawn Noodles comprise seasoned prawns, Asian vegetables and bean shoots mixed through with Singapore noodles. The halal certified product contains no GMO ingredients, can be heated in the microwave in 3.5 minutes, is steam ready, and retails in a 350g pack that provides one potion.

Claims:
Halal, Ease of Use, GMO-Free, Microwaveable

Rhubru Rhubarb Compote

Rhubru Rhubarb Compote has been repackaged in a newly designed 400g pack. This all traditional product is ready to eat in cereal, yogurt, as a base for a dessert or just on its own. It is free from gluten, and contains natural colours and flavours.

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

Hong Kong Dim Sim Kitchen Pork Dim Sim

Hong Kong Dim Sim Kitchen Pork Dim Sim has been repackaged and is now available in a newly designed pack featuring a Facebook logo. The microwavable product is made from local and imported ingredients, and is said to be frozen straight away to lock in that authentic freshness. It retails in a 550g pack.

Claims:
Social Media, Microwaveable

Source: Mintel (2015)

Celery.

Purchase and consumption has remained relatively stable over past months.

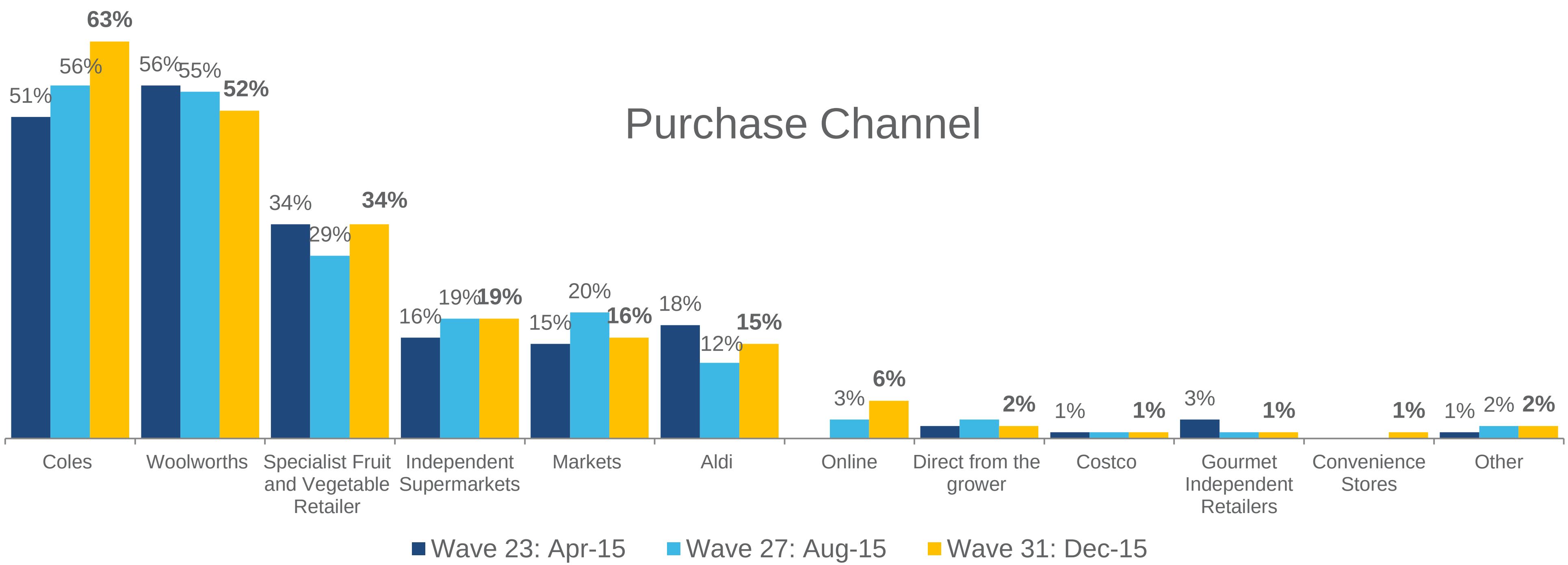
Coles is the key retail channel for purchase of celery, increasing across waves. Additionally, while it is still only a small channel, online purchase has doubled since August 2015.

Average Purchase **3.1** times per month

▼ 2.9 times, Wave 23
▲ 3.2 times, Wave 27

Average Consumption **9.9** times per month

▼ 9.0 times, Wave 23
▼ 9.5 times, Wave 27



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 23 N=310, Wave 27 N=301 and Wave 31 N=307

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 **900g** of Celery, which is consistent with previous waves.

▼ 800g, Wave 23
▼ 800g, Wave 27

Recalled last spend

The average recalled last spend on Celery was **$2.70**, in line with past months.

▼ $2.60, Wave 23
▲ $2.80, Wave 27

Value for money

On average, consumers perceive Celery to be good value for money **(6.5/10)**, which has remained stable across past months.

– 6.5/10, Wave 23
▼ 6.4/10, Wave 27

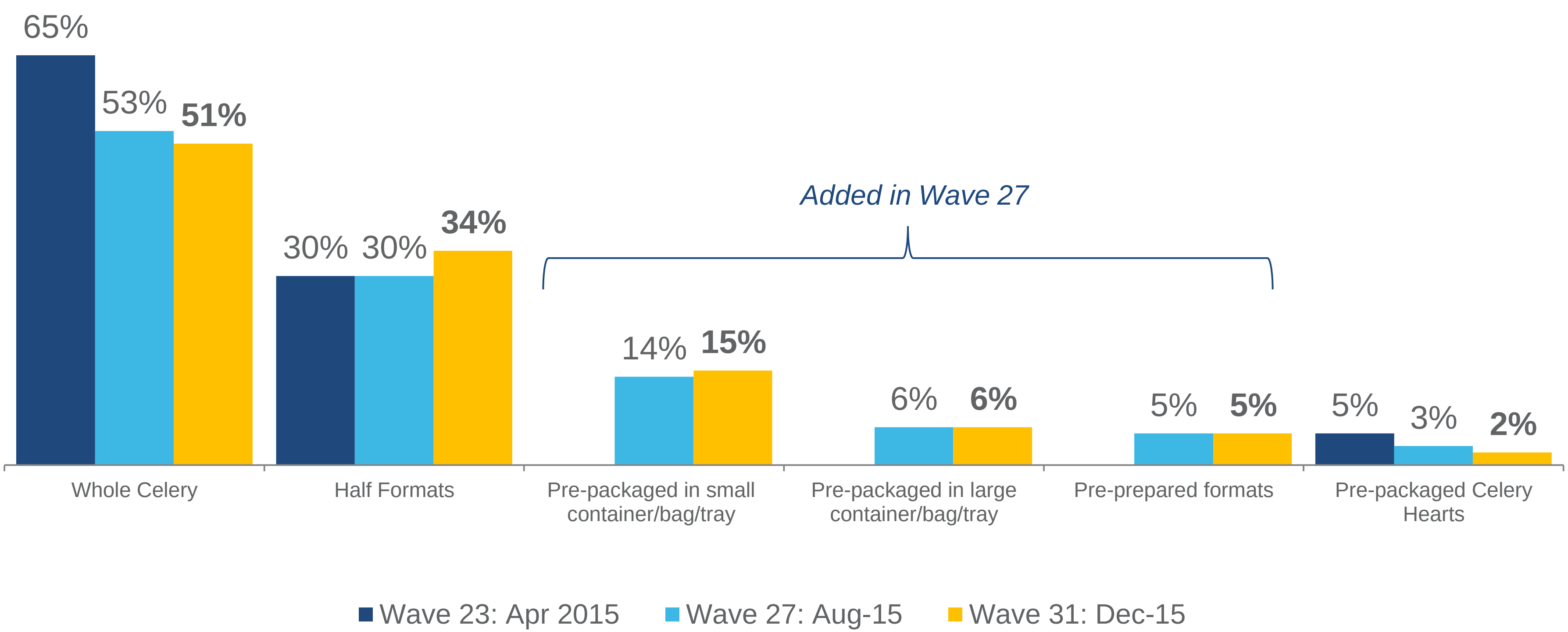
Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? 0-10 scale
Sample Wave 23 N=310, Wave 27 N=301 and Wave 31 N=307

Horticulture Innovation Australia

colmar brunton.

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

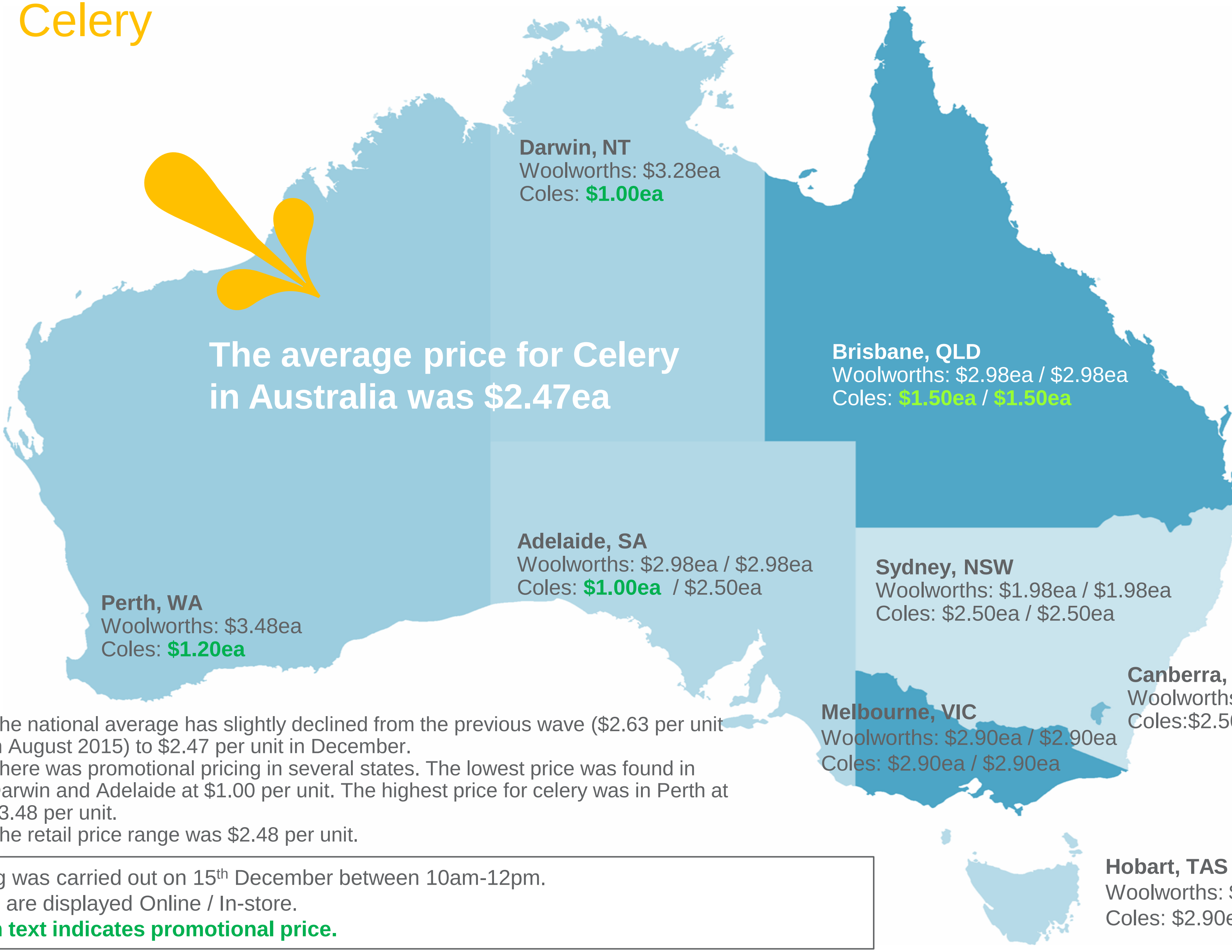
Over half of consumers purchase whole celery formats. Half and pre-packaged options are also popular.



Q4b In what fresh formats do you typically purchase Celery?
Sample Wave 23 N=310, Wave 27 N=301 and Wave 31 N=307

Online and In-store Commodity Prices

Celery



- The national average has slightly declined from the previous wave ($2.63 per unit in August 2015) to $2.47 per unit in December.
- There was promotional pricing in several states. The lowest price was found in Darwin and Adelaide at $1.00 per unit. The highest price for celery was in Perth at $3.48 per unit.
- The retail price range was $2.48 per unit.

Pricing was carried out on 15th December between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates promotional price.

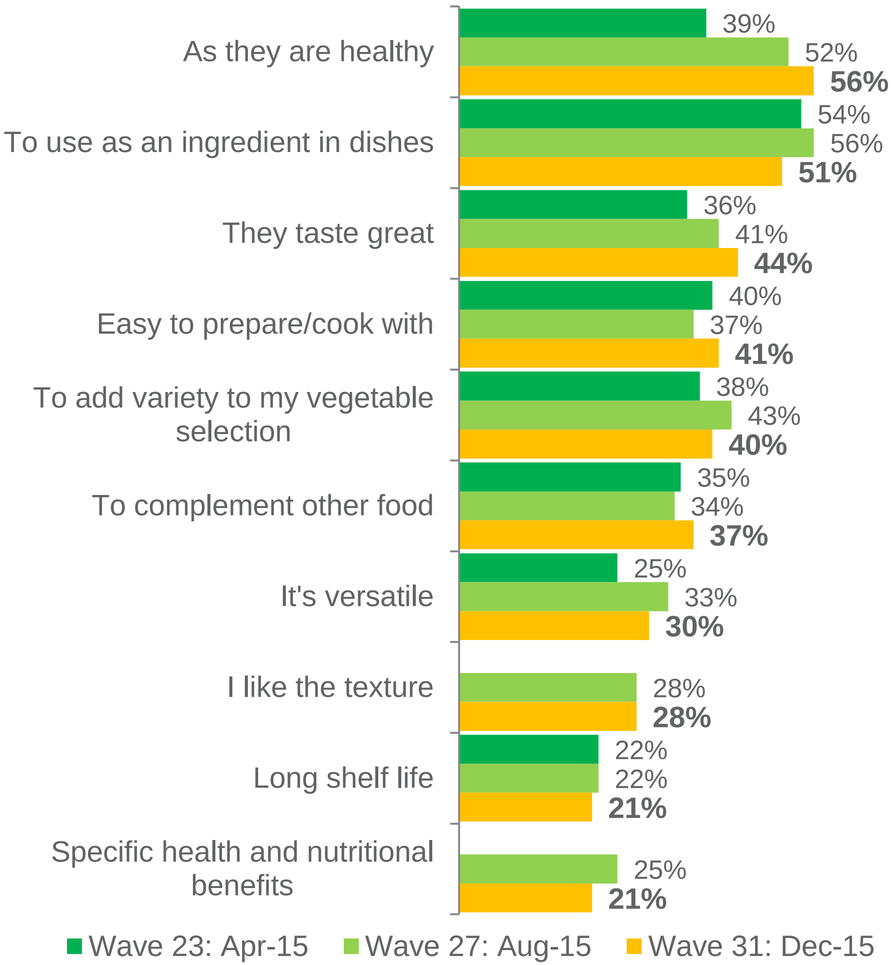
Spontaneous awareness of celery varieties remains very low, with 84% of consumers unable to recall a type.

- Consumers who stated a type of celery recall the ‘normal’ one and ‘green’ types.

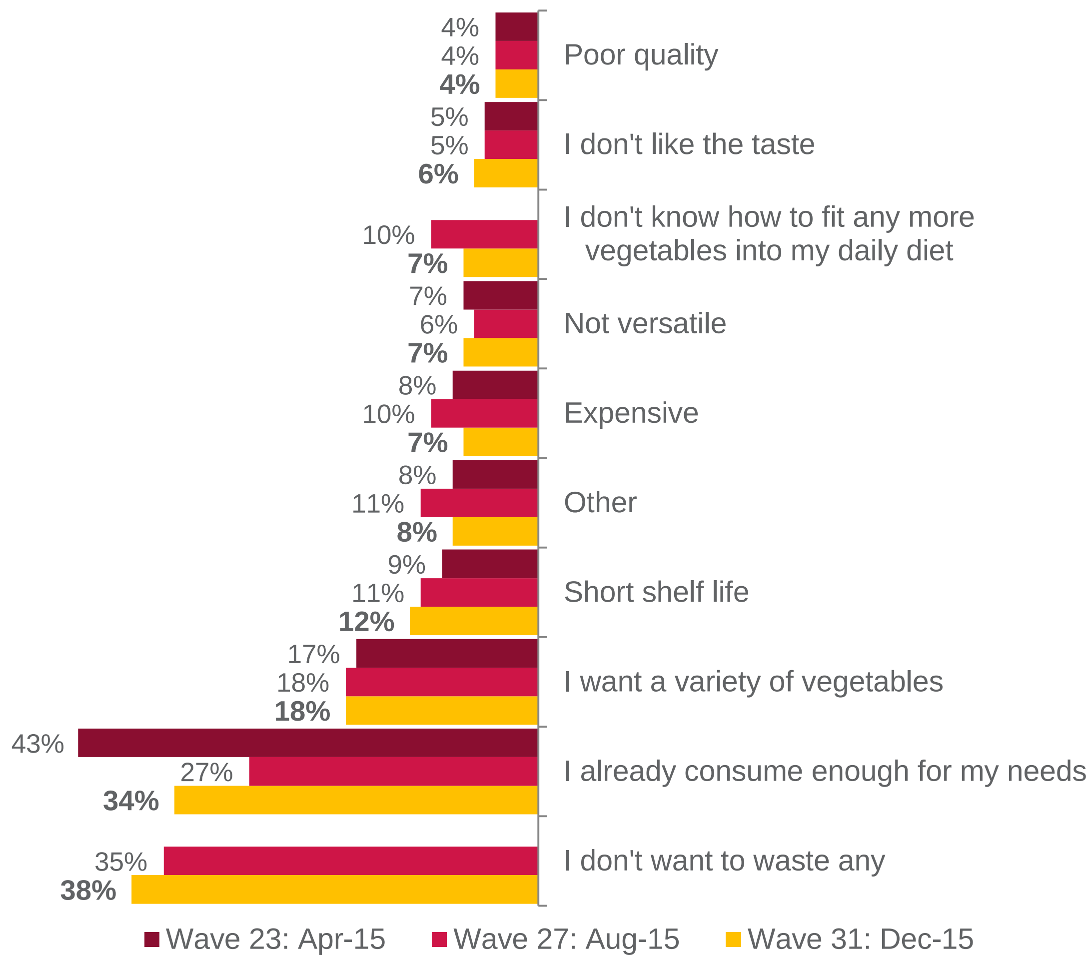
Q6a. What varieties of <commodity> are you aware of? (unprompted)
Sample Wave 23 N=310, Wave 27 N=301 and Wave 31 N=307

Health has consistently increased as a trigger to purchase across waves. Taste has also strengthened as a positive influence on purchase. Waste is the main barrier to celery purchase.

Triggers



Barriers



Q7. Which of the following reasons best describes why you purchase <commodity> ?
Q8. Which reason best describes why you don't buy <commodity> more often?
Sample Wave 23 N=310, Wave 27 N=301 and Wave 31 N=307

Celery is used across a variety of cuisines including Australian, Chinese and for snacks.

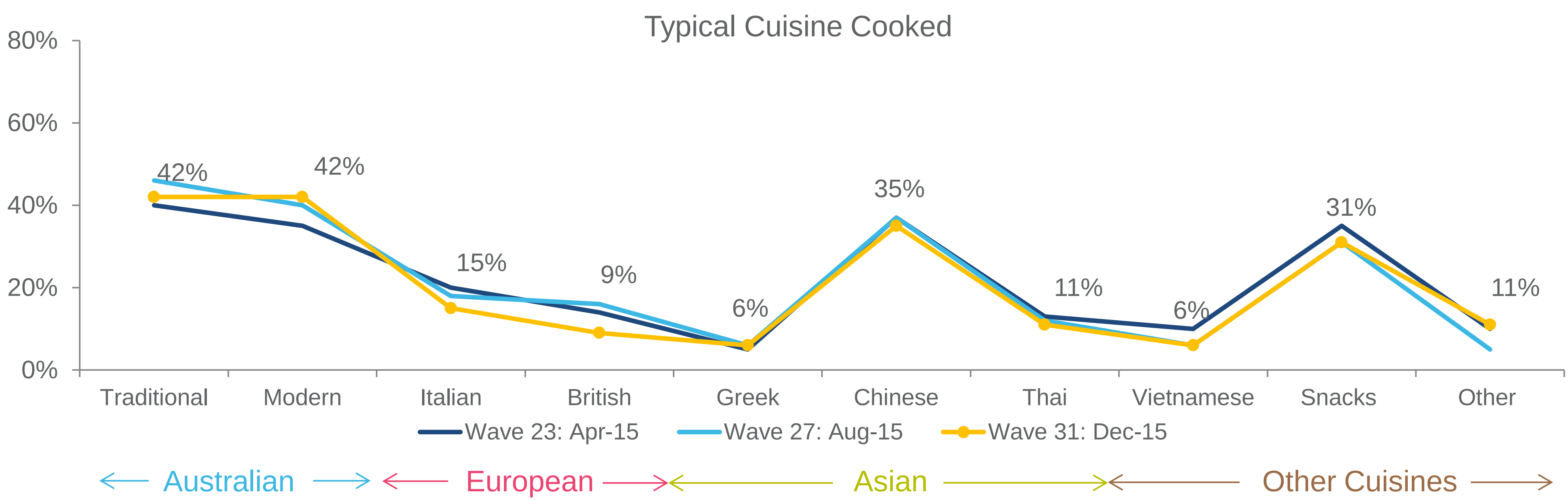
This wave has seen a substantial increase in consumption of celery as individual snacks at home.

Top 5 Consumption Occasions

	Wave 27	Wave 31
Dinner	57%	**54%**
Family Meals	49%	**46%**
Individual snacks at home	34%	**45%**
Quick Meals	36%	**38%**
Lunch	37%	**35%**

11% used celery when cooking a new recipe

▼ 13%, Wave 27



Q10. What cuisines do you cook/consume that use <commodity> ?
Q11. Which of the following occasions do you typically consume/use <commodity> ?
Sample Wave 23 N=310, Wave 27 N=301 and Wave 31 N=307

Horticulture Innovation Australia

colmar brunton.

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

There has been a increase in the pairing of celery and tomatoes this wave, while carrots and capsicums also remain popular. Celery is more likely to be consumed raw this month, with over two thirds of consumers eating it uncooked

Accompanying Vegetables

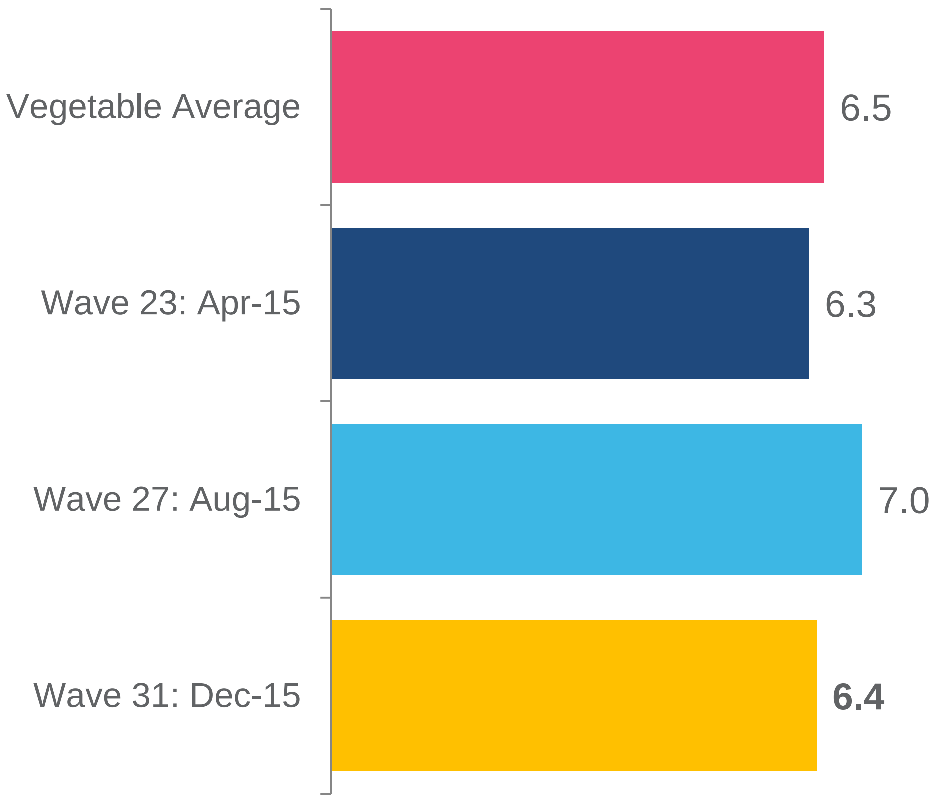
Carrot	64%
Tomato	51%
Capsicum	45%
Onion	44%
Lettuce	43%

Top Cooking Styles

	Wave 23	Wave 27	Wave 31
Raw	62%	62%	**70%**
Stir frying	49%	53%	**47%**
Soup	46%	53%	**39%**
Stewing	31%	26%	**16%**
Sautéing	14%	14%	**10%**
Boiling	7%	9%	**7%**
Steaming	8%	8%	**7%**
Other	6%	5%	**7%**
Deep Frying	1%	9%	**6%**
Microwave	3%	1%	**4%**

Q9. How do you typically cook <commodity> ?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
Sample Wave 23 N=310, Wave 27 N=301 and Wave 31 N=307

The importance of celery provenance has fallen this wave, but remains in line with the Vegetable Average. Australian provenance remains important to consumers.



8.0

Q14. When purchasing <commodity>, how important is Provenance to you?
Q15. And when purchasing Celery, how important is that it is grown in Australia?
Sample Wave 23 N=310, Wave 27 N=301 and Wave 31 N=307

Celery is expected to remain fresh for nine days after purchase, slightly down on past months.

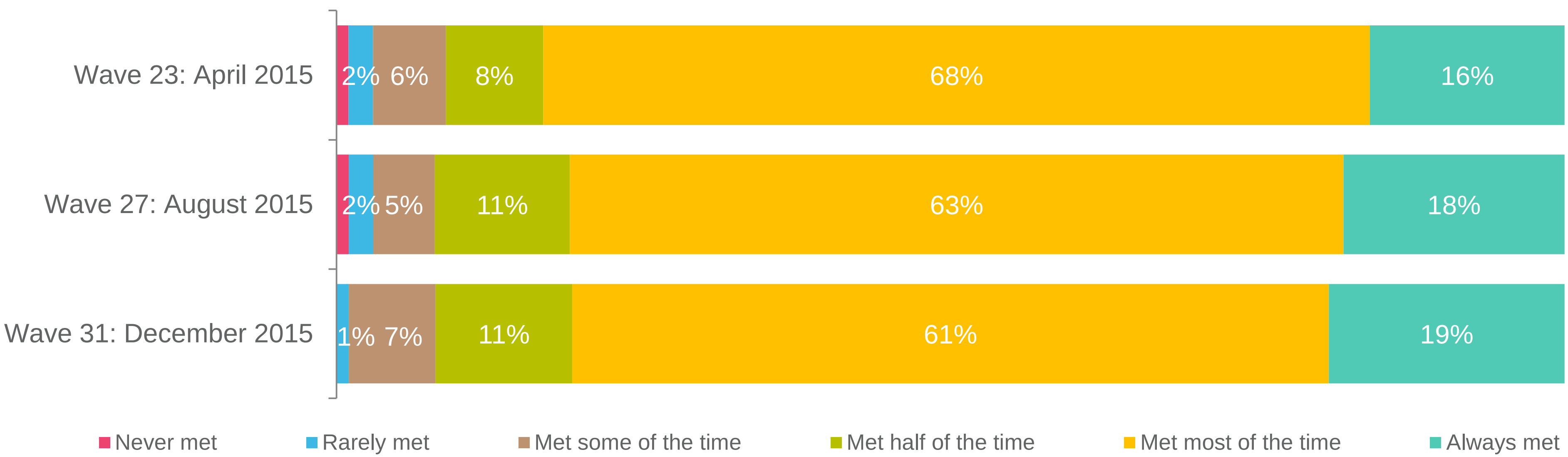
However, the likelihood of freshness expectations being met has remained stable.

Expected to stay fresh for **9.0** days

▲ 9.9 days, Wave 23

▲ 10.2 days, Wave 27

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 23 N=310, Wave 27 N=301 and Wave 31 N=307

Horticulture Innovation Australia

colmar brunton.

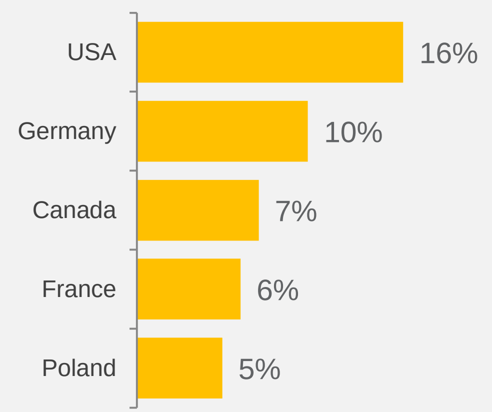
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Trends: Celery

Celery Global NPDs
October – December 2015

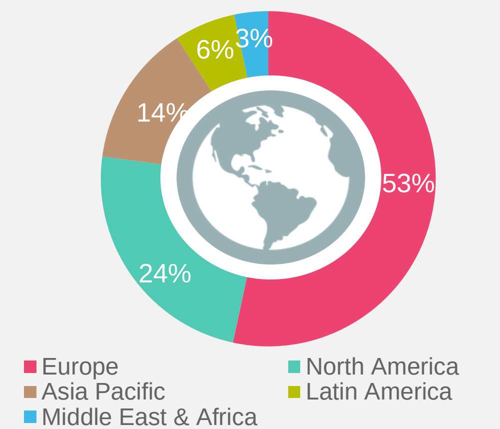
There were 1167 products containing celery launches in the past three months. Launches primarily occurred in Europe. USA and Germany were the most popular launch countries. Categories for launch were sauces, meals and processed products.

Country

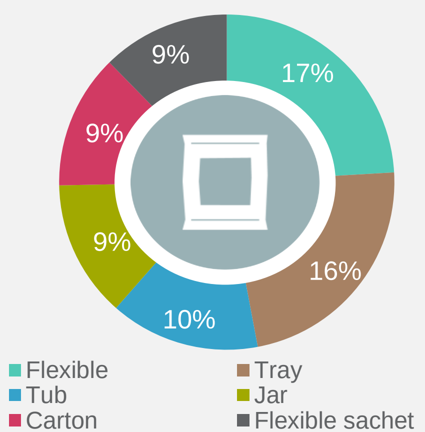


1167 Global Launches

Region



Top Pack Formats



Categories

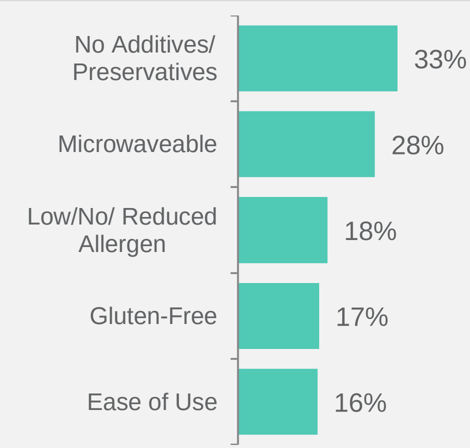
Sauces & Seasonings 23%

Meals 22%

Processed Products 16%

Soup 16%

Top Claims



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

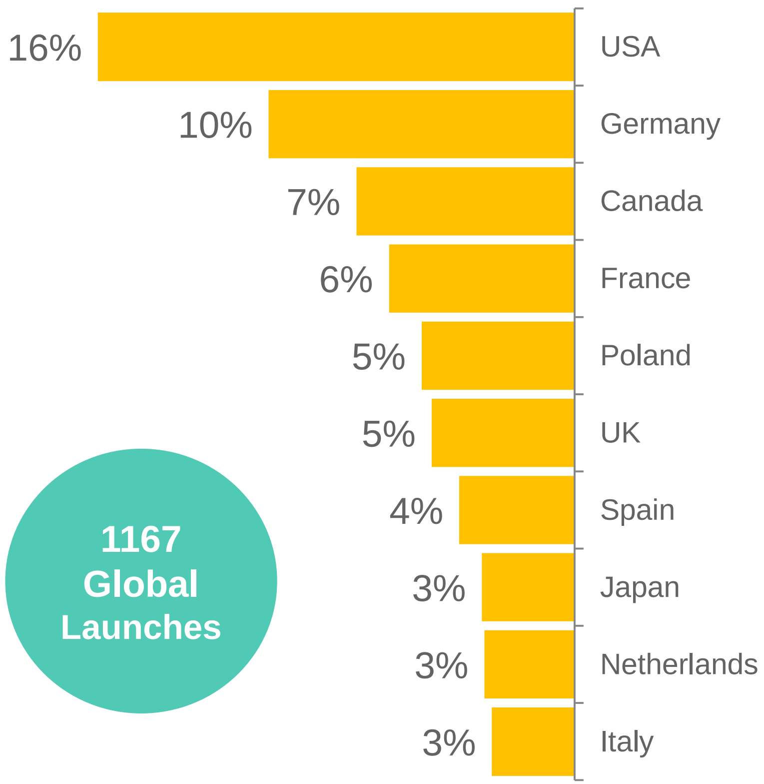
- Consistent with previous trends, a large number of products (N=1167) containing celery as an ingredient were launched globally in the last three months.
- There were 20 products launched in Australia, which was higher than in previous waves. Products included soups and seasonings.
- The majority of launches occurred in Europe (53%). Key countries for launch were USA and Germany.
- Flexible packaging (17%) and trays (16%) were the main packaging types used for products.
- Sauces and seasoning (23%), meals (22%) and processed products (16%) were the main categories for launches, consistent with previous trends.
- Core claims used were no additives or preservatives (33%) and microwavable (28%).
- The most innovative product launch this wave was a Portable Chicken Protein Pack from Puerto Rico. Examples of other innovative launches can be found on the following pages.

Source: Mintel (2015)

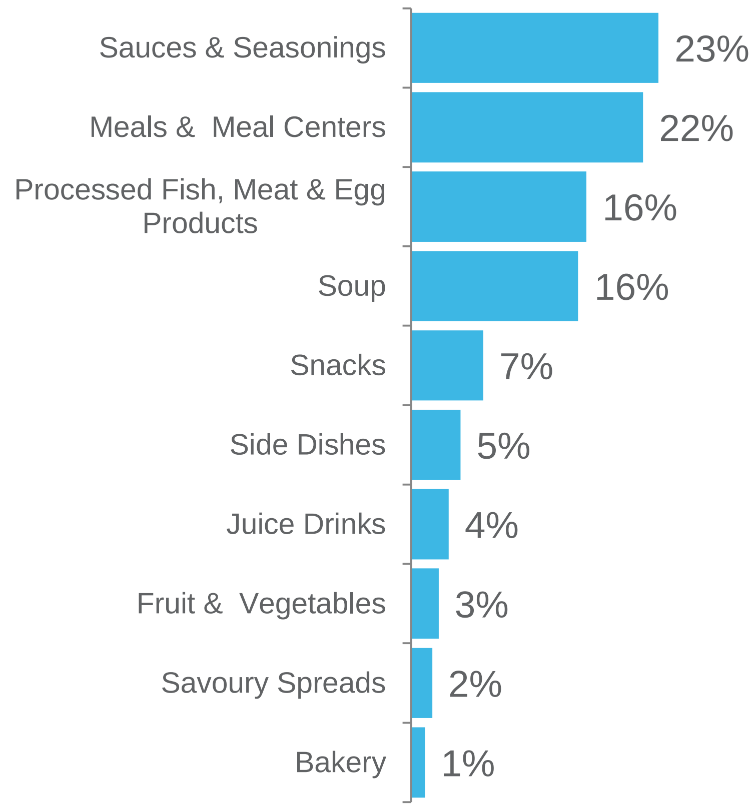
Celery Launches

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

Top Launch Countries



Top Launch Categories



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

Pack Formats Used

Global	Flexible	16%
	Tray	15%
	Tub	9%
Europe	Tray	21%
	Flexible	18%
	Tub	12%
North America	Flexible	13%
	Can	12%
	Carton	12%

Top Claims Used

Global	No Additives/Preservatives	33%
	Microwaveable	28%
	Low/No/Reduced Allergen	16%
Europe	No Additives/Preservatives	26%
	Microwaveable	26%
	Low/No/Reduced Allergen	18%
North America	No Additives/Preservatives	41%
	Microwaveable	37%
	Ease of Use	25%

Only regions with n >30 are displayed

Innovative Celery Launches:
L3M (October – December 2015)

Profi Sunny Salads Gyros Salad with Rice and Vegetables (Poland)

Profi Sunny Salads Salatka Gyros z Ryzem i Warzywami (Gyros Salad with Rice and Vegetables) is now available. The gluten-free product retails in a 240g pack containing a fork.

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

Oscar Mayer P3 Chicken Portable Protein Pack (Puerto Rico)

Oscar Mayer P3 Chicken Portable Protein Pack has been repackaged in a new design. It is said to be an excellent source of protein, with 13g per serving, and it comprises Oscar Mayer rotisserie seasoned chicken breast browned with caramelized sugars, Kraft mild cheddar cheese, and Planters dry roasted peanuts. The USDA certified product contains no artificial preservatives, and it retails in a 2-oz. pack.

Claims:
Cobranded, No Additives/Preservatives, On-the-Go

Iceland Italian Chicken & Mushroom Risotto (UK)

Iceland Italian Chicken & Mushroom Risotto has been relaunched. The product is described as a traditionally cooked risotto using Italian Arborio rice combined with a creamy spinach, white wine and cheese sauce, succulent seared chicken breast strips and oven roasted chestnut mushrooms finished with shavings of cheese. The microwavable product retails in a 450g partly recyclable pack.

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

Duc De Coeur Burgundy Style Cooked Snails (Germany)

Duc De Coeur Weinbergschnecken (Burgundy Style Cooked Snails) are now available. The product retails in an 89g pack.

Claims:
N/A

Source: Mintel (2015)

Innovative Celery Launches:
L3M (October – December 2015)

Amigo Burritos XL Hot Chicken Burrito (Poland)

Amigo Burritos XL Pikantne Burrito z Kurczakiem (Hot Chicken Burrito) comprises a wheat tortilla with vegetables, pieces of baked chicken, rice, matured rennet cheese and sauce. The microwaveable product retails in a 240g pack.

Claims:
Microwaveable

Peitien Domi Bear Vegetable Flavoured Oat Rice Cracker (China)

Peitien Domi Bear Shu Cai Kou Wei Yan Mai Mi Bing (Vegetable Flavoured Oat Rice Cracker) contains various grains, and is enriched with vitamin A and vitamin D3. This non-fried product is halal certified, suitable for vegans, and available in an 100g pack.

Claims:
Halal, No Animal Ingredients, Vitamin/Mineral Fortified, Vegan, Children (5-12)

VégéDélice Vegetarian Nuggets (France)

VégéDélice Nuggets Végétariens (Vegetarian Nuggets) are now available. This vegetable protein based product is said to be quick and easy to prepare, has the taste and texture of normal nuggets, and is a healthy and rich alternative to meat. It can be pan or oven heated, or deep fried, and retails in a 360g pack containing 18 units.

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

Jamie Oliver Grill Seasoning (Germany)

Jamie Oliver Grill-Gewurz-Zubereitung (Grill Seasoning) has been relaunched. Previously marketed under the Jamie Oliver Keep It Simple brand, this hot and fiery blend of coriander, cumin, mustard and fennel seeds is suitable for vegetarians and retails in a newly designed 50g recyclable jar.

Claims:
Vegetarian, Ethical - Environmentally Friendly Package

Source: Mintel (2015)

Innovative Celery Launches:
L3M (October – December 2015)

Wellshire Organic Organic Uncured Turkey Bacon (USA)

Wellshire Organic Organic Uncured Turkey Bacon comprises chopped and formed turkey thighs from certified organic turkey that has been grain-fed an organic diet, free of pesticides and has been raised humanely. Unpreserved and microwaveable, this product is USDA certified, contains no nitrites or nitrates, and retails in an 8-oz. pack. The manufacturer is claimed to care about the ultimate sustainability of the planet.

Claims:

No Additives/Preservatives, Organic, Ethical - Environmentally Friendly Product, Ethical - Animal, Microwaveable

Hellmann's Mango Curry Sauce (Spain)

Hellmann's Salsa Curry Mango (Mango Curry Sauce) is now available. The product retails in a 258g pack.

Claims:

N/A

Maggi Nostimia Bio Organic Vegetables & Herbs Seasoning Powder (Greece)

Maggi Nostimia Bio Viologikos Zomos Lachanikon & Myrodikon se Skoni (Organic Vegetables & Herbs Seasoning Powder) is now available. The product retails in a 110g pack featuring the EU Leaf, Facebook and Instagram logos.

Claims:

Organic, Social Media

Skin Food Vita Water Pore Fit Cushion Bottle SPF 50+ PA+++ (South Korea)

Skin Food Vita Water Pore Fit Cushion Bottle SPF 50+ PA+++ is described as a refreshing, long-wear cushion bottle foundation that cools heat-stressed enlarged pores. The lightweight, moisturising formula features: Semat complex, tomato, celery, lemon and broccoli extracts, and Chojeong sparkling water; and is claimed to help control oil for an all day smooth, even finish; to act brightening, anti-wrinkle; and to provide foll cover coating and sun protection with a cooling effect.

Claims:

Botanical/Herbal, UV Protection, Brightening / Illuminating*, Long-Lasting*, Mattifying*, Moisturising / Hydrating, Anti-Ageing, Reduces Fine Lines / Wrinkles*

Source: Mintel (2015)

Australian Celery Launches:
L3M (October – December 2015)

Indonesian Quick as Wok! Nasi Goreng

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

Ready Chef Homestyle Cottage Pie

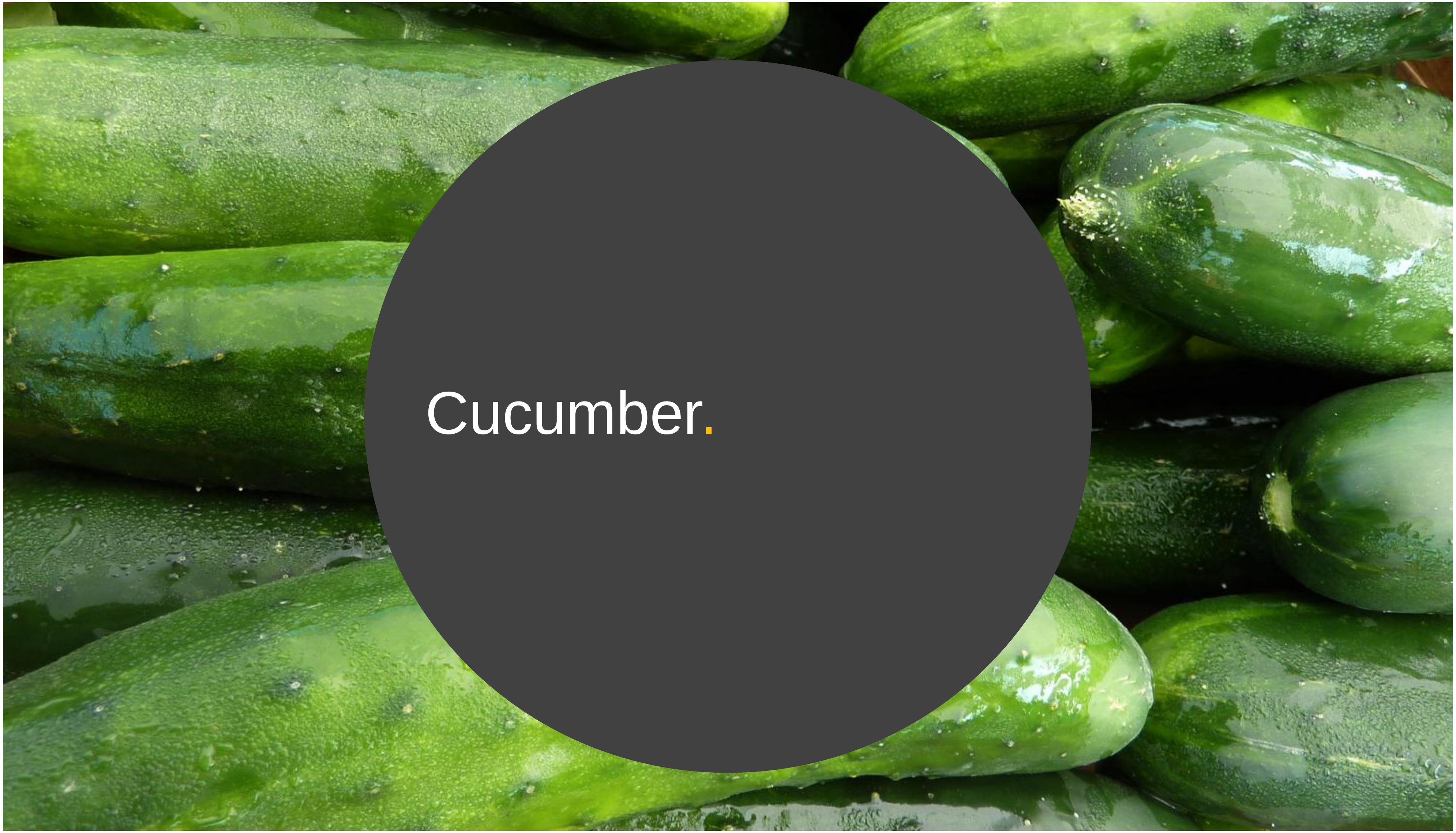
Clever Cooks Pasta Box Slow Cooked Beef Ragu

Health Rite Veggie Salt

Keen's Curry Traditional Chow Mein Recipe Base

Source: Mintel (2015)

Cucumber.



Cucumber purchase and consumption are consistent with past months. On average, cucumbers are eaten three times per week.

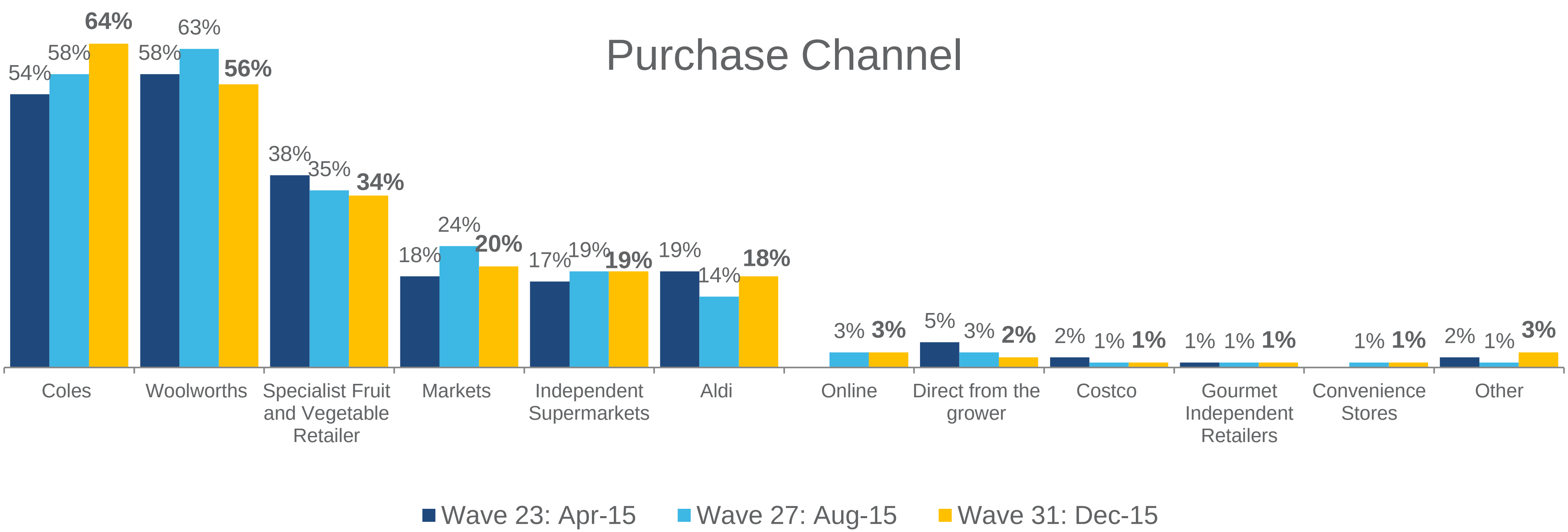
Key channels for purchase are mainstream retailers. Over the past three waves there has been a decline in purchase from specialist retailers.

Average Purchase **4.3** times per month

- 4.3 times, Wave 23
- ▲ 4.4 times, Wave 27

Average Consumption **12.3** times per month

- ▲ 12.7 times, Wave 23
- ▼ 11.8 times, Wave 27



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 23 N=308, Wave 27 N=306, Wave 31 N=306

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 Cucumber, which is slightly lower than past months.

▲ 700g, Wave 23
▲ 800g, Wave 27

Recalled last spend

The average recalled last spend is **$2.60**, which is consistent with the previous waves.

▲ $2.80, Wave 23
▲ $2.80, Wave 73

Value for money

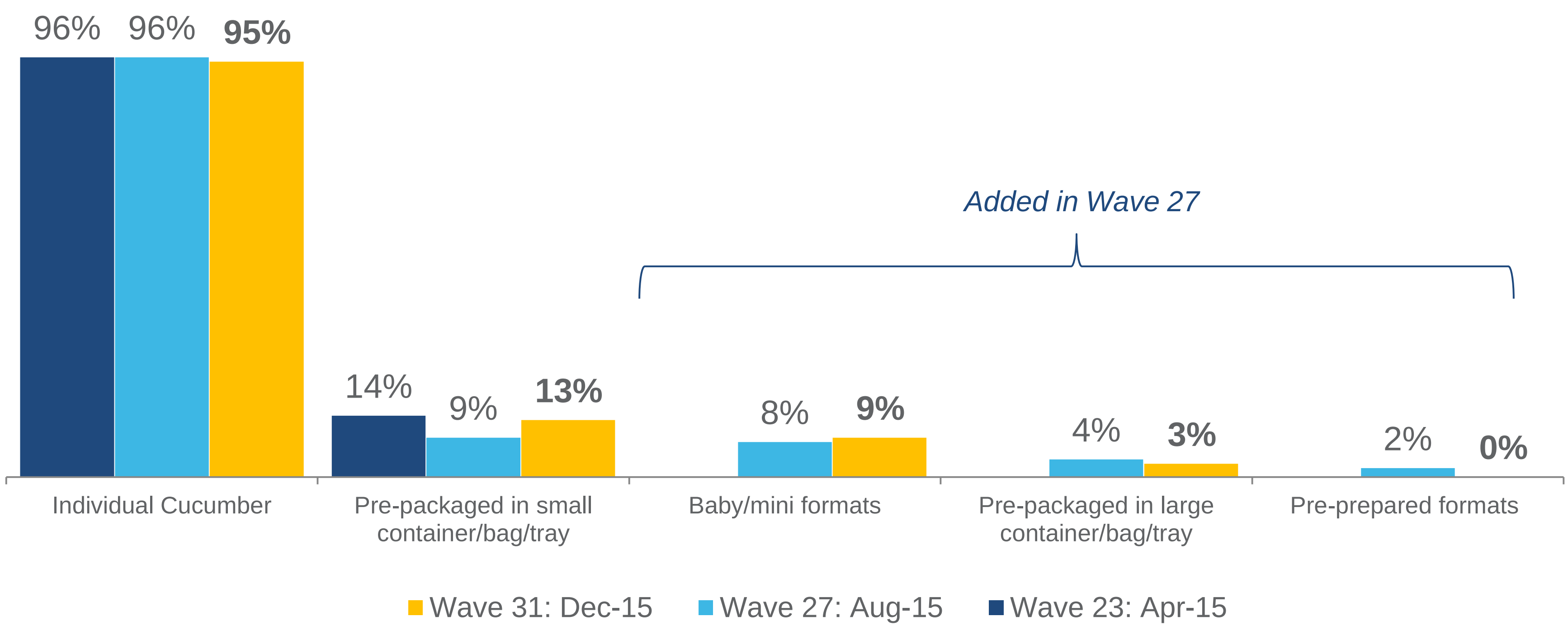
On average, consumers perceive Cucumber to be good value for money **(6.4/10)**, which remains stable.

▼ 6.3/10, Wave 23
▼ 6.3/10, Wave 27

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 23 N=308, Wave 27 N=306, Wave 31 N=306

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

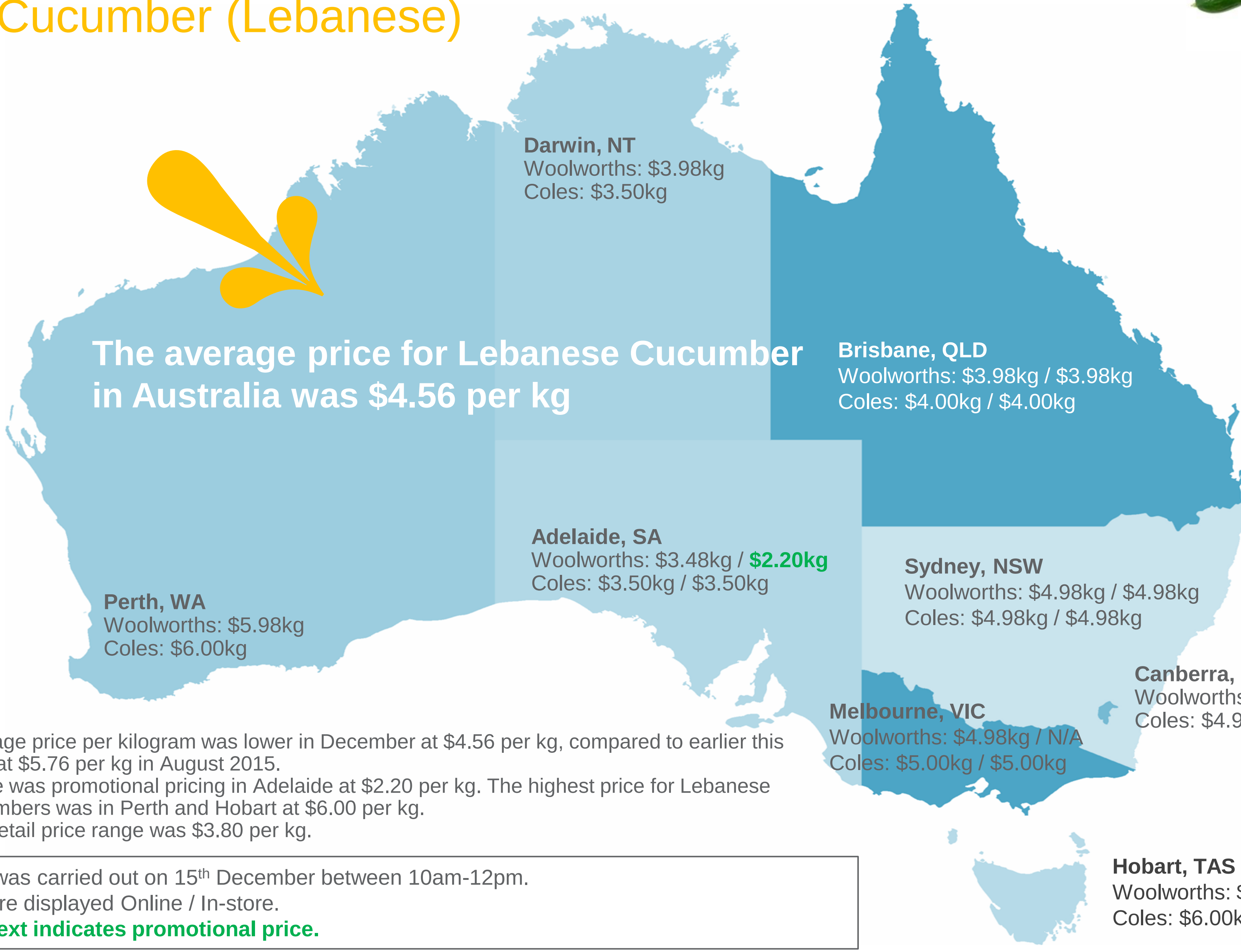
Consumers primarily purchase individual cucumbers. There is a small market for pre-packaged and baby cucumber formats.



Q4b In what fresh formats do you typically purchase Cucumber?
Sample Wave 23 N=308, Wave 27 N=306, Wave 31 N=306

Online and In-store Commodity Prices

Cucumber (Lebanese)

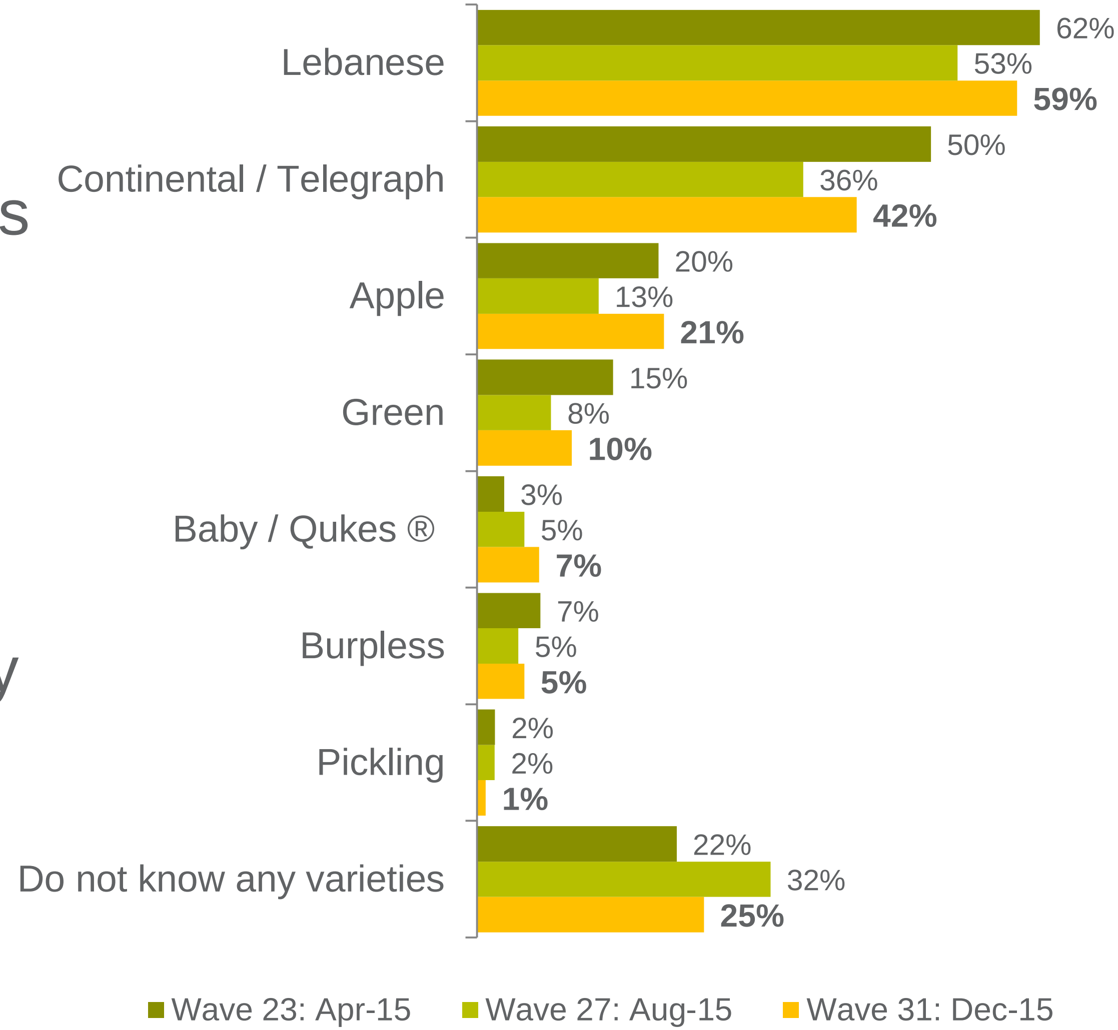


- Average price per kilogram was lower in December at $4.56 per kg, compared to earlier this year at $5.76 per kg in August 2015.
- There was promotional pricing in Adelaide at $2.20 per kg. The highest price for Lebanese cucumbers was in Perth and Hobart at $6.00 per kg.
- The retail price range was $3.80 per kg.

Pricing was carried out on 15th December between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates promotional price.

Spontaneous awareness of cucumbers is higher this wave.

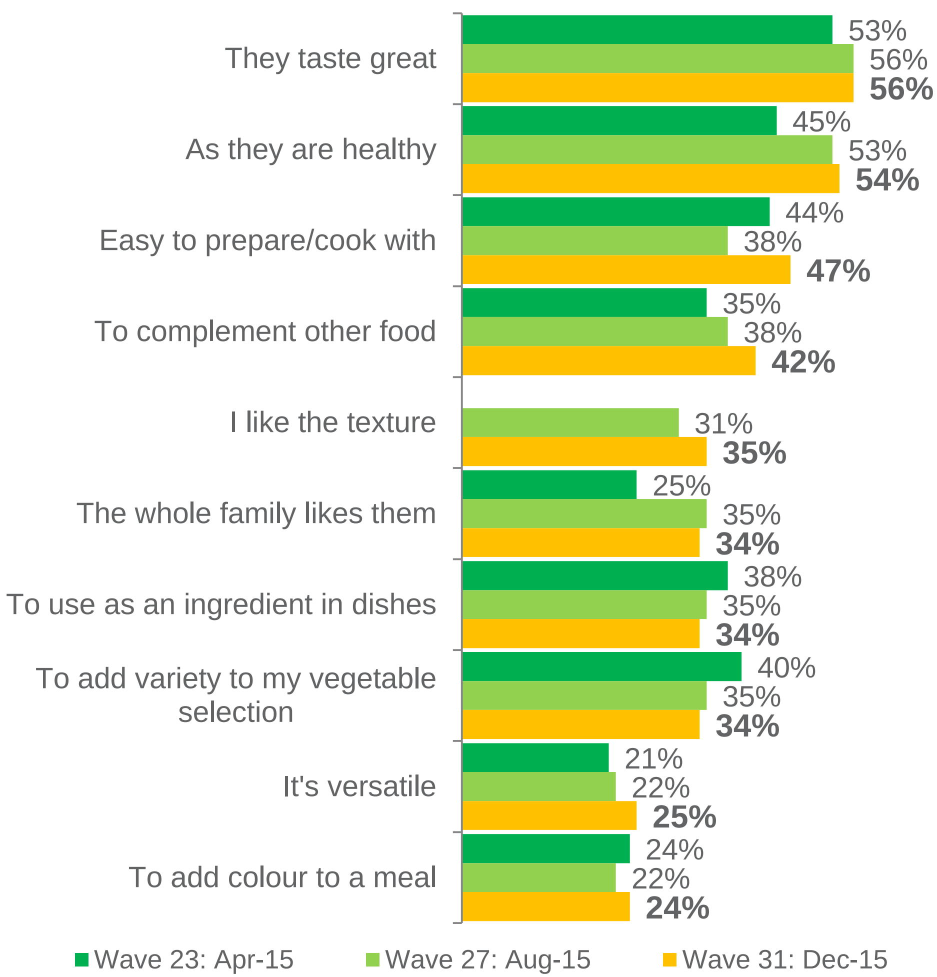
There has been a continuous increase in identification of Baby/Qukes as a variety of cucumber.



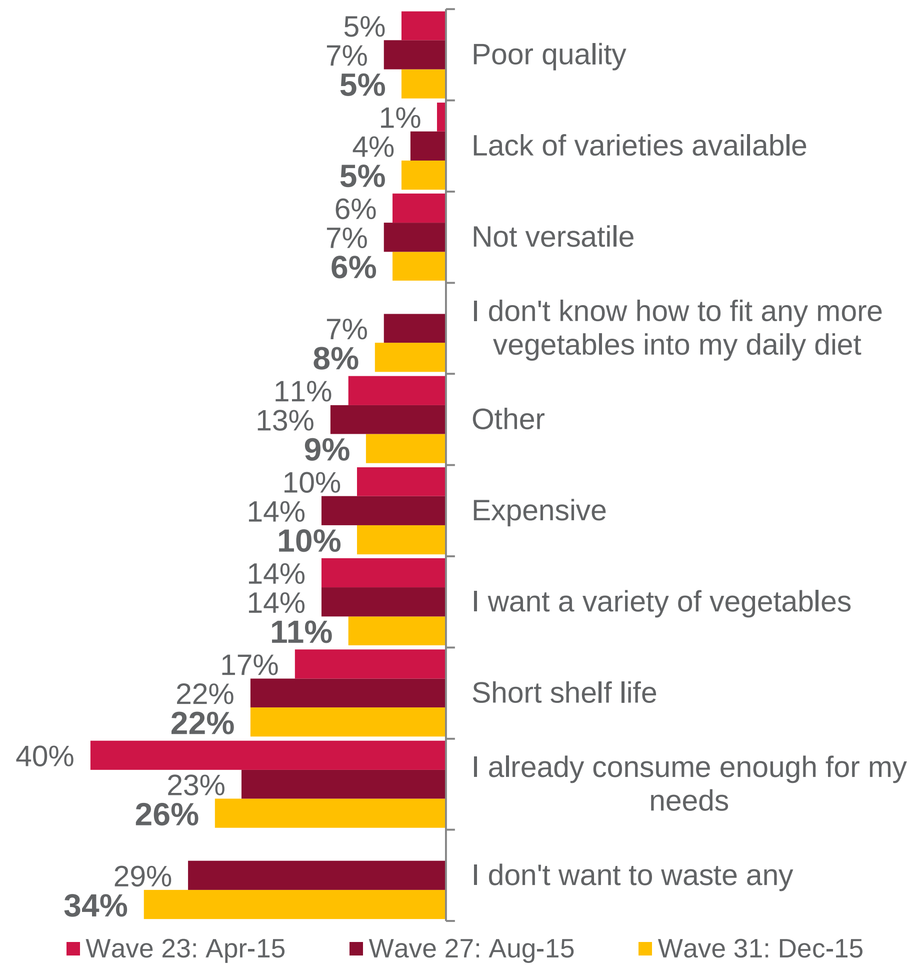
Q6a. What types/varieties of <commodity> are you aware of? (unprompted)
Sample Wave 23 N=308, Wave 27 N=306, Wave 31 N=306

Taste and health remain the key triggers to cucumber purchase. There has been an increase in buying cucumbers to complement other food over past months. Wastage and consuming enough continue to be barriers to future purchase.

Triggers



Barriers



Q7. Which of the following reasons best describes why you purchase <commodity> ?
Q8. Which reason best describes why you don't buy <commodity> more often?
Sample Wave 23 N=308, Wave 27 N=306, Wave 31 N=306

Lunch and dinner are the main meal occasions for cucumber consumption.

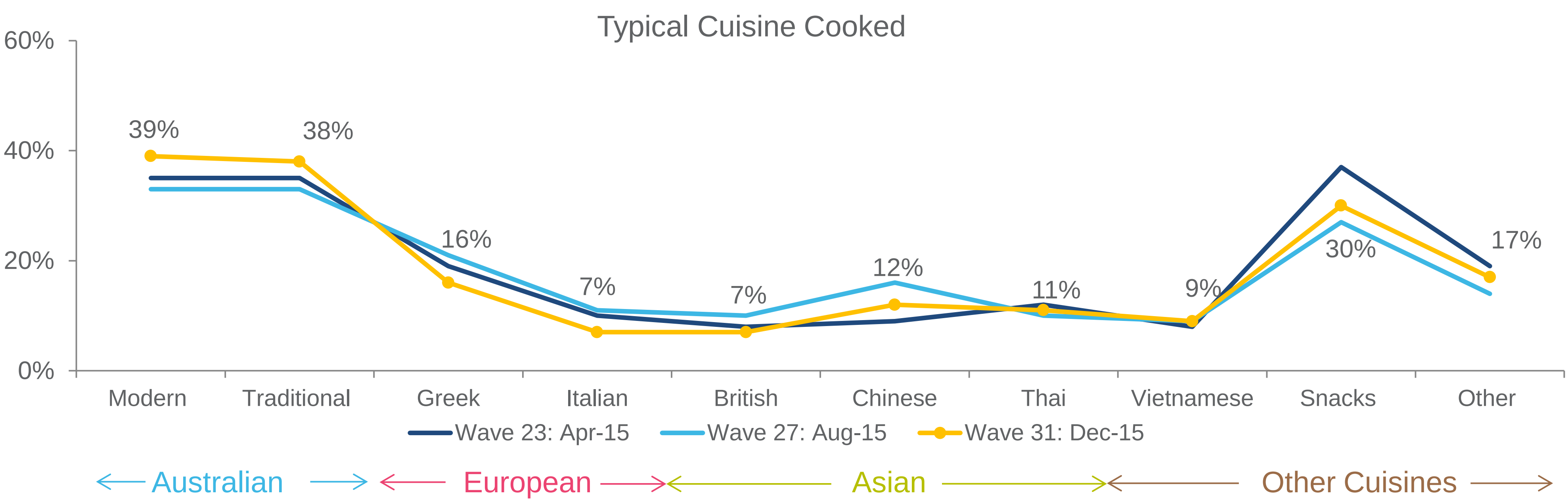
There are limited cuisine styles currently being cooked using cucumber. Australian and snacks are most popular with consumers.

Top 5 Consumption Occasions

	Wave 27	Wave 31
Lunch	57%	**56%**
Dinner	57%	**51%**
Quick Meals	46%	**49%**
Family meals	40%	**43%**
Weekday meals	34%	**36%**

7% used cucumber when cooking a new recipe

▲ 8%, Wave 27



Q10. What cuisines do you cook/consume that use <commodity> ?
Q11. Which of the following occasions do you typically consume/use <commodity> ?
Sample Wave 23 N=308, Wave 27 N=306, Wave 31 N=306

Horticulture Innovation Australia

colmar brunton.

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

Cucumber is typically served with salad vegetables; including tomatoes, lettuce, capsicums and carrots.

The primary consumption style is raw, which has gradually increased across waves.

Accompanying Vegetables

Tomato	72% ▼
Lettuce	63% ▲
Capsicum	47% ▲
Carrot	46% ▲
Onion	36% ▲

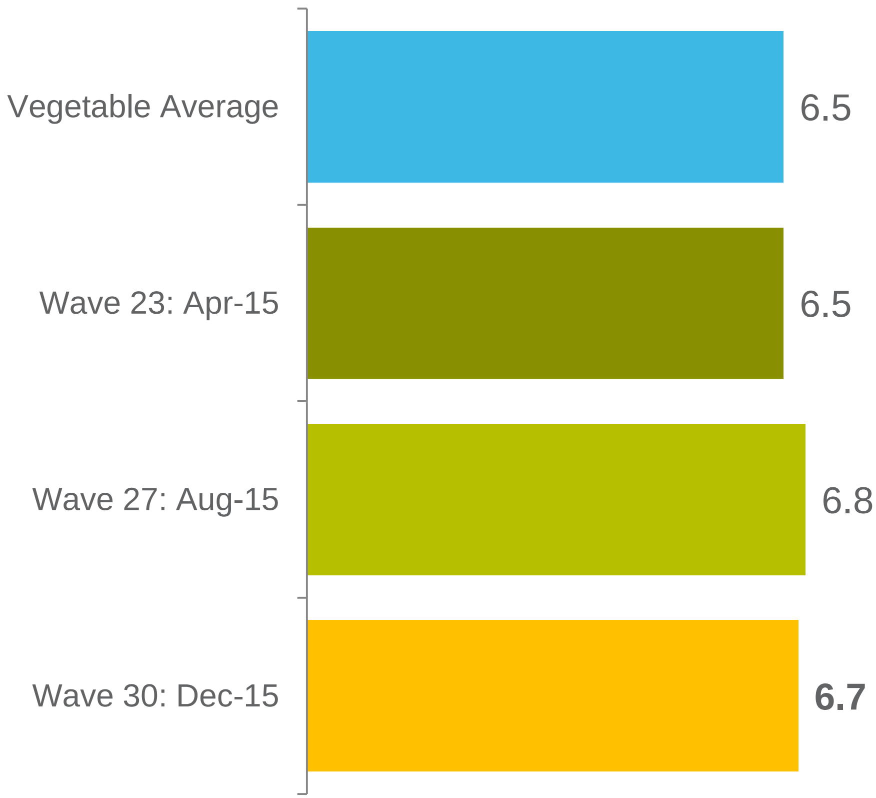
Top Cooking Styles

	Wave 23	Wave 27	Wave 31
Raw	77%	79%	**82%**
Other	16%	12%	**13%**
Stir frying	10%	13%	**10%**
Deep Frying	1%	5%	**3%**
Grilling	1%	4%	**2%**
Steaming	3%	5%	**2%**
Soup	5%	7%	**2%**
Sautéing	1%	4%	**2%**
Microwave	2%	2%	**1%**
Roasting	2%	4%	**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 23 N=308, Wave 27 N=306, Wave 31 N=306

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

Importance of cucumber provenance has remained consistent across months, sitting above the vegetable average. This indicates that consumers want to know the provenance of cucumbers they purchase and most importantly, that it is grown in Australia.



Q14. When purchasing <commodity>, how important is Provenance to you?
Q15. And when purchasing Cucumber, how important is that it is grown in Australia?
Sample Wave 23 N=308, Wave 27 N=306, Wave 31 N=306

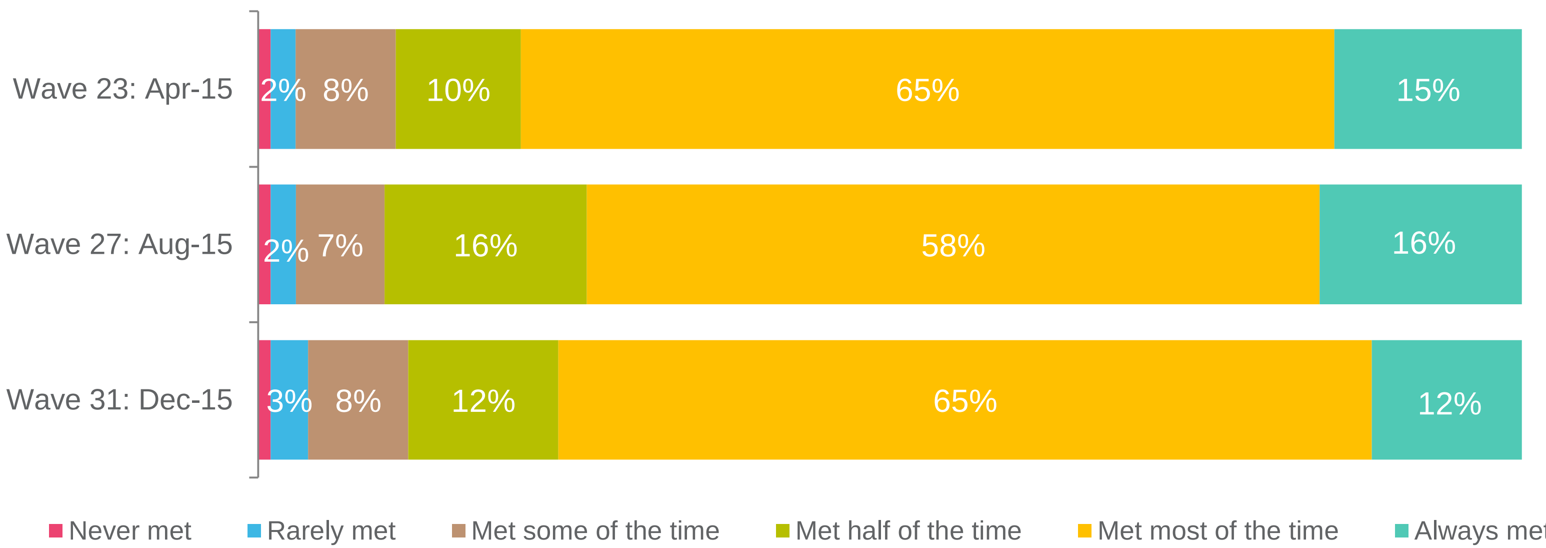
Expectations of freshness have increased this month, and have returned to the levels of April 2015. However, there has been a decline in longevity of cucumber freshness, falling to seven days.

Expected to stay fresh for **7.3** days

▲ 7.6 days, Wave 23

▲ 8.1 days, Wave 27

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 23 N=308, Wave 27 N=306, Wave 31 N=306

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

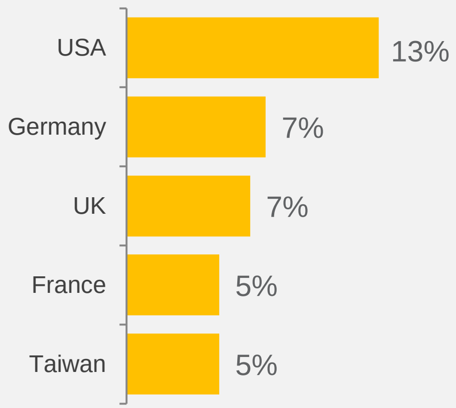
Trends: Cucumber

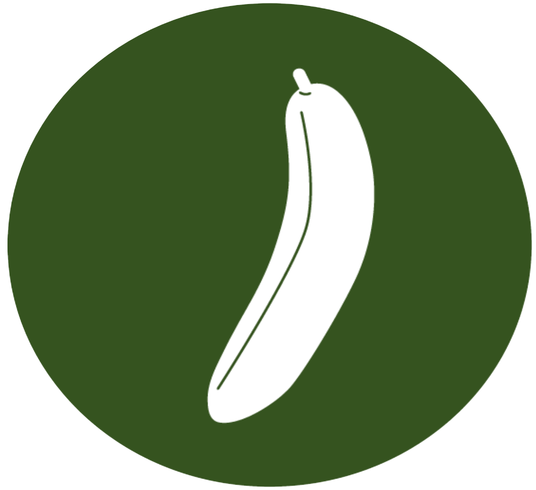
Cucumber Launches

October – December 2015

There were 363 products launched globally in the last three months that contained cucumber as an ingredient. The majority of launches occurred in Europe and Asia Pacific regions. The key categories for launches were skincare, meals, sauces and juice drinks.

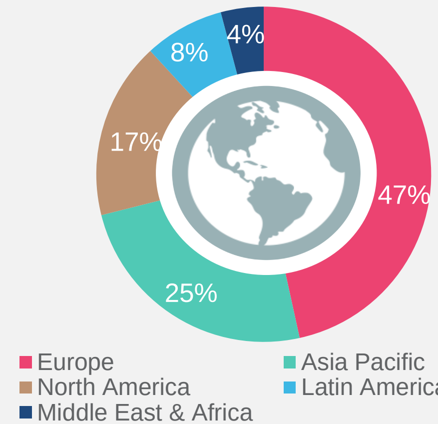
Country



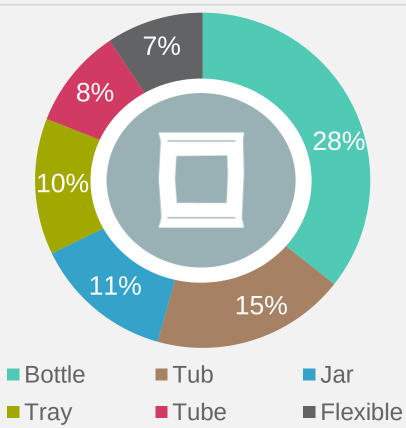


363 Global Launches

Region



Top Pack Formats



Categories

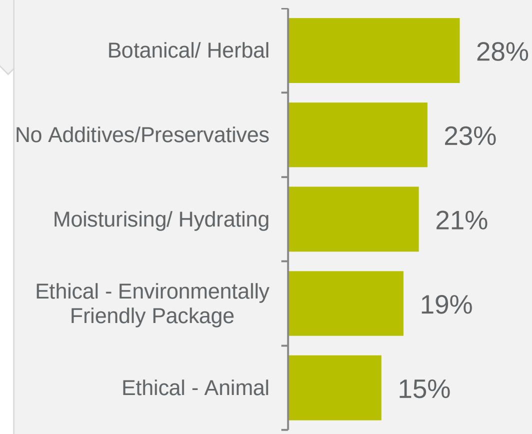
Skincare 26%

Meals 18%

Sauces & Seasonings 12%

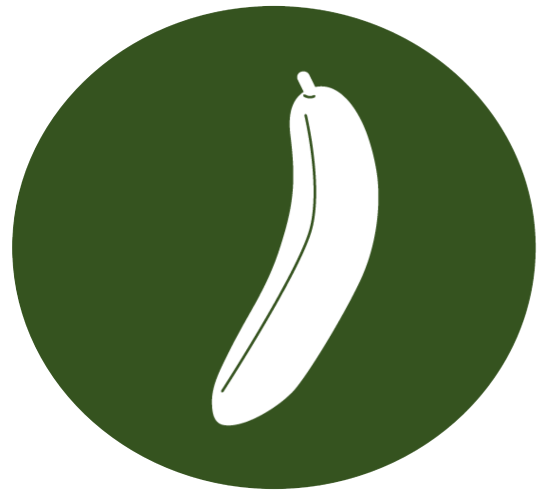
Juice Drinks 11%

Top Claims



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

- There were 363 cucumber products launched globally, relatively consistent with the previous wave.
- There were 8 products containing cucumber launched in Australia over the last three months. These were primarily salads, juices, and beauty & skincare products.
- Key regions for launch were Europe (47%) and Asia Pacific (25%).
- Bottles (28%), tubs (15%) and jars (11%) were the most common packaging formats used.
- Top category launches were skincare (26%), meals (18%) and sauces & seasonings (12%).
- The top claims used for products were botanical/herbal (28%), no additives/preservatives (23%) and moisturising/hydrating (21%).
- The most innovative launch was a cucumber syrup from Russia for flavouring drinks (examples of these can be found in the following pages).

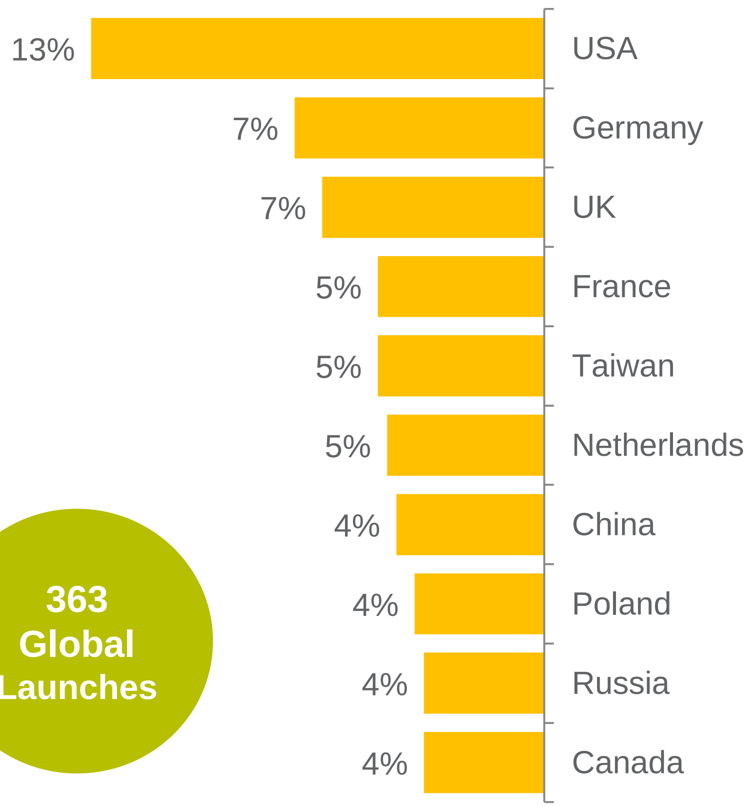


Source: Mintel (2015)

Cucumber Launches

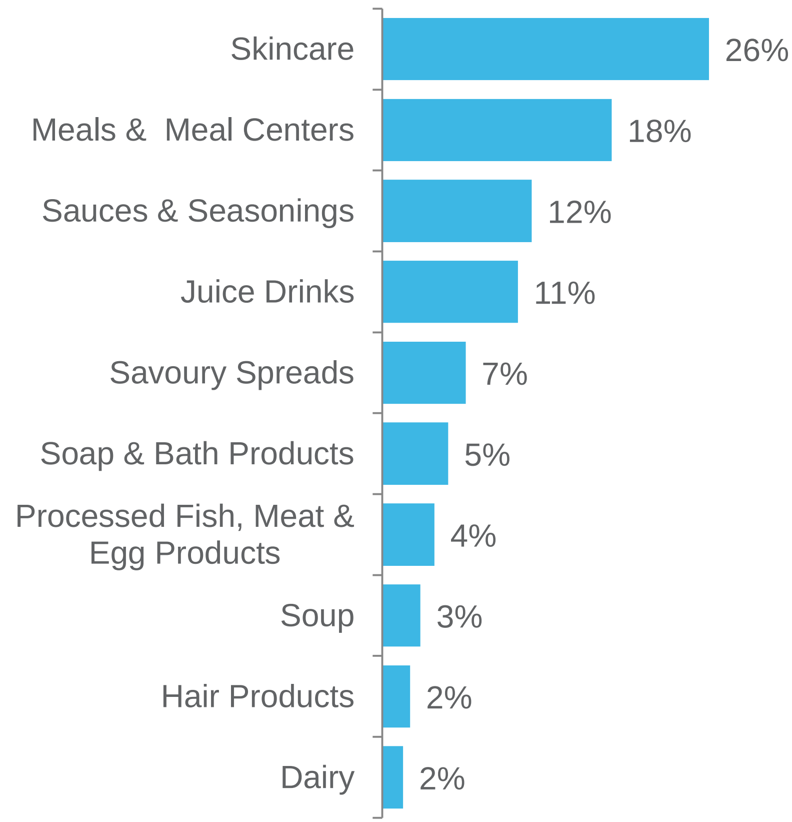
- USA and Germany were the main countries of launch for cucumber products.
- Products were primarily skincare, meals, sauces and juice drinks.

Top Launch Countries



363 Global Launches

Top Launch Categories



The main claims used on products were botanical/herbal, no additives/preservatives and ethical – environmentally friendly packaging. Bottles and tubs were typical packaging formats used, consistent with previous waves.

Pack Formats Used

Global	Bottle	28%
	Tub	14%
	Tray	10%
Europe	Tub	25%
	Bottle	21%
	Tray	18%
Asia Pacific	Bottle	33%
	Tube	16%
	Flexible Sachet	16%

Top Claims Used

Global	Botanical/Herbal	22%
	No Additives/Preservatives	18%
	Ethical - Environmentally Friendly Package	17%
Europe	No Additives/Preservatives	22%
	Ethical - Environmentally Friendly Package	22%
	Low/No/Reduced Allergen	15%
Asia Pacific	Botanical/Herbal	47%
	Moisturising/Hydrating	37%
	No Additives/Preservatives	22%

Only regions with n >30 are displayed

Innovative Cucumber Launches:
L3M (October – December 2015)

Bloem Zon & Na After Sun Spray (Netherlands)

Bloem Zon & Na After Sun Spray is described as medical device designed to cool, care, nourish, protect and restore the skin. According to the manufacturer, it reduces sun blisters and itching, and features a highly moisture-retaining hyaluronic acid with the covering layer of colloidal oatmeal and aloe vera extract, which help the skin against drying out or getting red due to swelling, extreme dry skin or itching.

Claims:
Botanical/Herbal, Moisturising / Hydrating

Human+Kind Apple & Herbs Sensitive Conditioner (USA)

Human+Kind Apple & Herbs Sensitive Conditioner is described as a gentle conditioner with the welcoming fragrance of apple and herbs that is formulated for sensitive scalps. The two-in-one conditioner is made from kind ingredients and is said to help soothe the sensitive skin on the scalp while nourishing it and adding shine to hair. The cruelty-free, hypoallergenic, non-comedogenic and vegan product is 99.6% natural and free from parabens, petrochemicals, SLS, sulfates, and phthalates and gluten.

Claims:
For Sensitive Skin, Sulphate/Sulfate Free, Paraben Free, Brightening / Illuminating*, Vegan, Hypoallergenic, Ethical - Animal, Gluten-Free, No Animal Ingredients

Touch Me Please Milky Lotion with Cucumber (Nigeria)

Touch Me Please Milky Lotion with Cucumber is claimed to refresh and soothe the skin with a 24-hour action. The super-rich formula features a mild and crisp cucumber scent, milk protein, cucumber extract and other skin nourishing ingredients along with natural botanical extracts. According to the manufacturer, the non-greasy lotion offers the perfect recipe for silky smooth skin, enveloped in a lightly lingering fragrance. The product is not tested on animals and retails in a 250ml pack.

Claims:
Botanical/Herbal, Long-Lasting*, Ethical - Animal

Great Gherkins Garden Pickles Bread & Butter Chips (USA)

Great Gherkins Garden Pickles Bread & Butter Chips are kosher certified. This product has been hand packed, and retails in a 25-fl. oz. recyclable jar.

Claims:
Ethical - Environmentally Friendly Package, Kosher

Source: Mintel (2015)

Innovative Cucumber Launches:
L3M (October – December 2015)

Sólem Lemonade and Cucumber Drink (Mexico)

Sólem Limonada con Pepino (Lemonade and Cucumber Drink) is now available in a newly designed packaging. The product is 100% natural, contains no preservatives, and retails in a 946ml bottle featuring a Facebook link.

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

Life Style Cool Sip Ice Cream Syrup (Pakistan)

Life Style Cool Sip Ice Cream Syrup is now available. This halal certified product retails in an 800ml bottle.

Claims:
Halal

Heinz Sandwich Spread with Cucumber (Costa Rica)

Heinz Sandwich Spread with Cucumber is deliciously fresh and deliciously different, comprising a light spread, which is a combination of crisp bits of vegetables that give a unique fresh taste. This tangy, crunchy spread is great on a sandwich and contains more than 60% vegetables and no preservatives. It retails in a 300g pack.

Claims:
No Additives/Preservatives

Skyr Green Supreme Icelandic Yoghurt (Sweden)

Skyr Green Supreme Isländsk Yoghurt (Green Supreme Icelandic Yoghurt) is flavoured with cucumber, aloe vera, Bramley apple and mint, and is only sweetened with agave syrup. This yoghurt has a fruit and vegetable content of 10.2%, contains no E-additives or flavours, and is said to contain 200% more protein than an ordinary yoghurt. It is made with original Icelandic skyr cultures, has a fat content of 0.2% and is naturally protein rich and filling.

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

Source: Mintel (2015)

Innovative Cucumber Launches:
L3M (October – December 2015)

BaResto Cucumber Syrup (Russia)

BaResto Sirop Ogurets (Cucumber Syrup) adds a fresh cucumber flavour to ice tea, martini and soft drinks and is said to help save time when preparing cocktails. This syrup is made with the best ingredients from the European manufacturers and retails in a 1L bottle. The product was on display at the trade show WorldFood Moscow 2015.

Claims:
Time/Speed

Farm House Culture Garlic Dill Pickle Gut Shot (USA)

Farm House Culture Garlic Dill Pickle Gut Shot is a live fermented drink with live probiotic cultures, L.Plantarum, L.Brevis, and 10 billion CFU's at time of manufacture. The USDA Organic product is vegan and gluten-free, contains no added sugar and is non-GMO verified. It is naturally probiotic and helps with energy, digestion, gut health, immune system, hangover, virility, hydration or can be used post workout. The product retails in a 16-fl. oz. pack containing over 10 shots per bottle.

Claims:
Immune System (Functional), Low/No/Reduced Allergen, GMO-Free, Gluten-Free, Other (Functional), Low/No/Reduced Sugar, Organic, No Animal Ingredients, Vegan, Digestive (Functional)

Shoga Mix Detox Beetroot, Cucumber & Ginger Beverage Concentrate (Brazil)

Shoga Mix Detox Beterraba, Pepino, Gengibre (Beetroot, Cucumber & Ginger Beverage Concentrate) is now available. This 100% natural product contains no gluten or added sugar, and retails in a 100g pack.

Claims:
Gluten-Free, All Natural Product, Low/No/Reduced Allergen, Digestive (Functional), Low/No/Reduced Sugar

¡Today Fiesta! Mediterráneamente Español Gazpacho Kit (Spain)

¡Today Fiesta! Mediterráneamente Español Kit Gazpacho (Gazpacho Kit) is now available on the market. The quick and easy-to-prepare product retails in a 375g environmental-friendly pack containing 350g of vegetable seasoning and 25g of crunchy bread pieces, and featuring a QR code.

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

Source: Mintel (2015)

Australian Cucumber Launches:
L3M (October – December 2015)

Absolut Botanik Berry Lime Botanically Flavoured Vodka Drink

Absolut Botanik Berry Lime Botanically Flavoured Vodka Drink comprises single source Swedish vodka which is layered with blueberry, lime and cucumber to created a fresh, lightly sparkling drink. The product retails in a recyclable pack containing four 330ml bottles.

Claims:
Ethical - Environmentally Friendly Package

The Juice Lab Green Light Premium Pressed Juice

The Juice Lab Green Light Premium Pressed Juice is made with pink lady apples, Goulburn Valley pear, cucumber, lemon, desert lime and ginger. This juice features five star Health Star Rating and is free from added sugar, fruit concentrates, artificial colours, artificial flavours and preservatives. The product retails in a 400ml bottle.

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

Coles Revitalising Facial Wash

Coles Revitalising Facial Wash is designed for men and formulated with vitamin E, cooling menthol, aloe and cucumber extracts, which are claimed to soothe and nourish skin while cleansing. Dermatologically-tested, it retails in a 100ml pack.

Claims:
Botanical/Herbal, Dermatologically Tested, Male, Vitamin/Mineral Fortified, Cleansing*

Trilogy Botanical Body Wash

Trilogy Botanical Body Wash is described as a stimulating shower gel designed to deliver an exceptionally fresh, clean skin. It features a crisp fragrance said to relax the mind, as well as non-drying cleansers to gently revive the body, leaving the user ready for action. It contains: kawa kawa extract, from the native New Zealand pepper tree, and Indian amla fruit, to invigorate and rejuvenate; soothing French lavender; cooling cucumber; and calming chamomile.

Claims:
Aromatherapy, GMO-Free, Botanical/Herbal, Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Ethical - Animal, Ethical - Human, Organic, Carbon Neutral

Source: Mintel (2015)

Zucchini.

Purchase frequency of zucchini is higher this month, whilst consumption frequency fell.

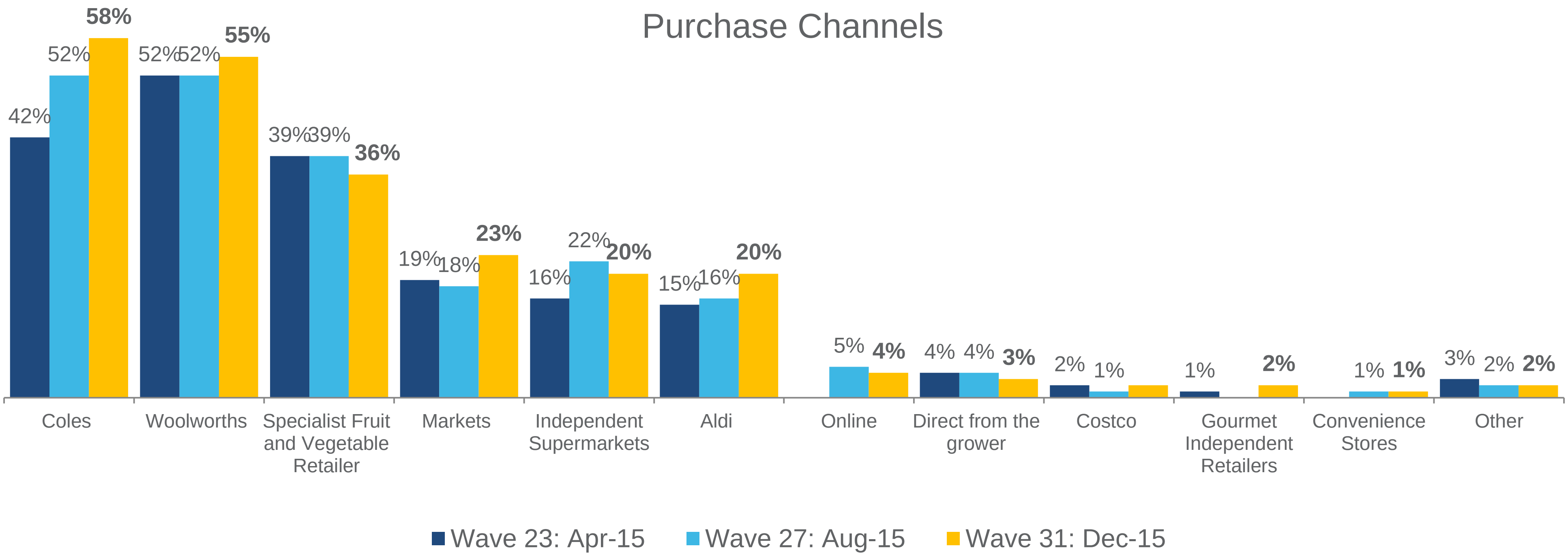
Purchase from Coles has consistently increased across waves, being the key retail channel. Similarly, purchase from Aldi is becoming more popular.

Average Purchase **4.2** times per month

▼ 3.9 times, Wave 23
▼ 3.6 times, Wave 27

Average Consumption **7.8** times per month

▼ 7.7 times, Wave 23
▲ 8.8 times, Wave 27



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 23 N=311, Wave 27 N=303 and Wave 31 N=304

▼: 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 zucchini per shop. Purchase weight remains stables across months.

— 700g, Wave 23
— 700g, Wave 27

Recalled last spend

The average recalled last spend is **$3.10**, which is slightly below past waves.

— $3.10, Wave 23
▼ $3.00, Wave 27

Value for money

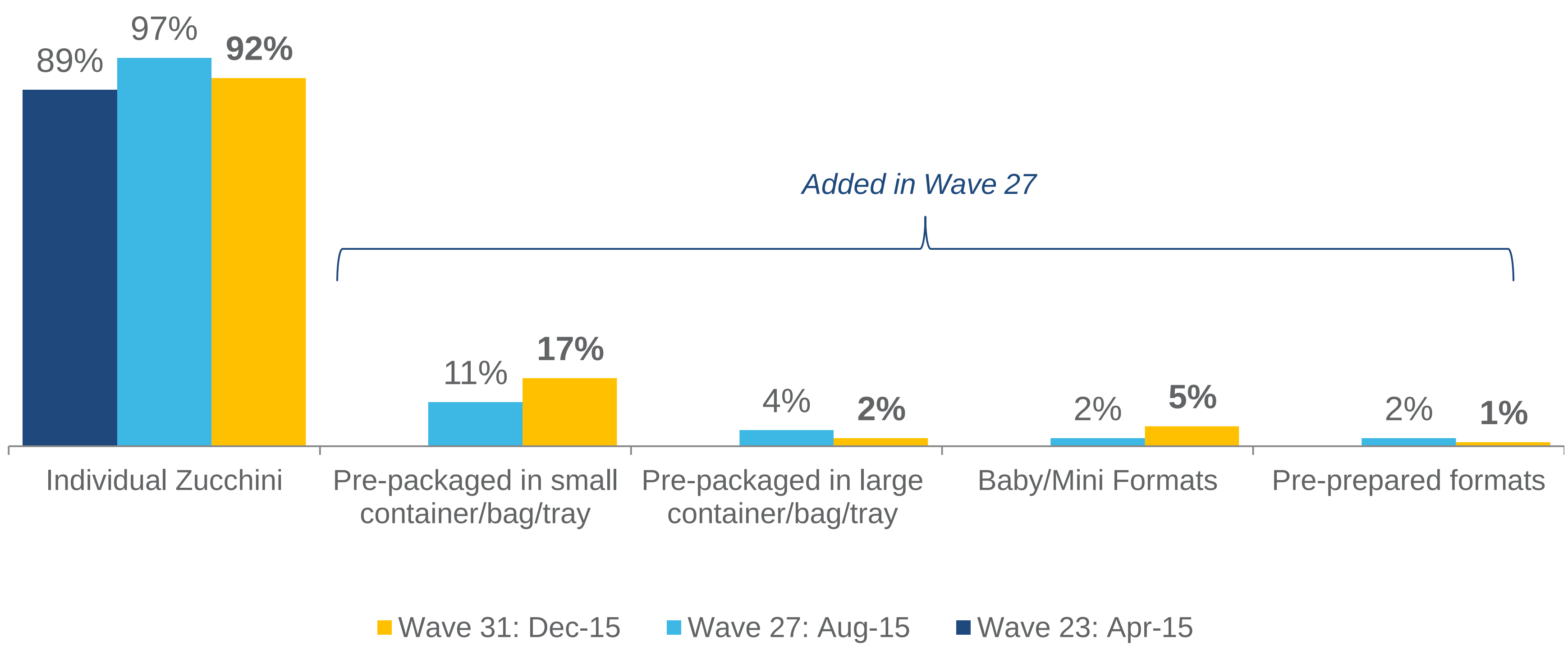
On average, consumers perceive zucchini to be fair value for money **(6.1/10)**, which has noticeably dropped since previous waves.

▲ 6.5/10, Wave 23
▲ 6.5/10, Wave 27

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 23 N=311, Wave 27 N=303 and Wave 31 N=304

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

Individual zucchini remain the main purchase format. However, there has been an increase in small pre-packaged formats.

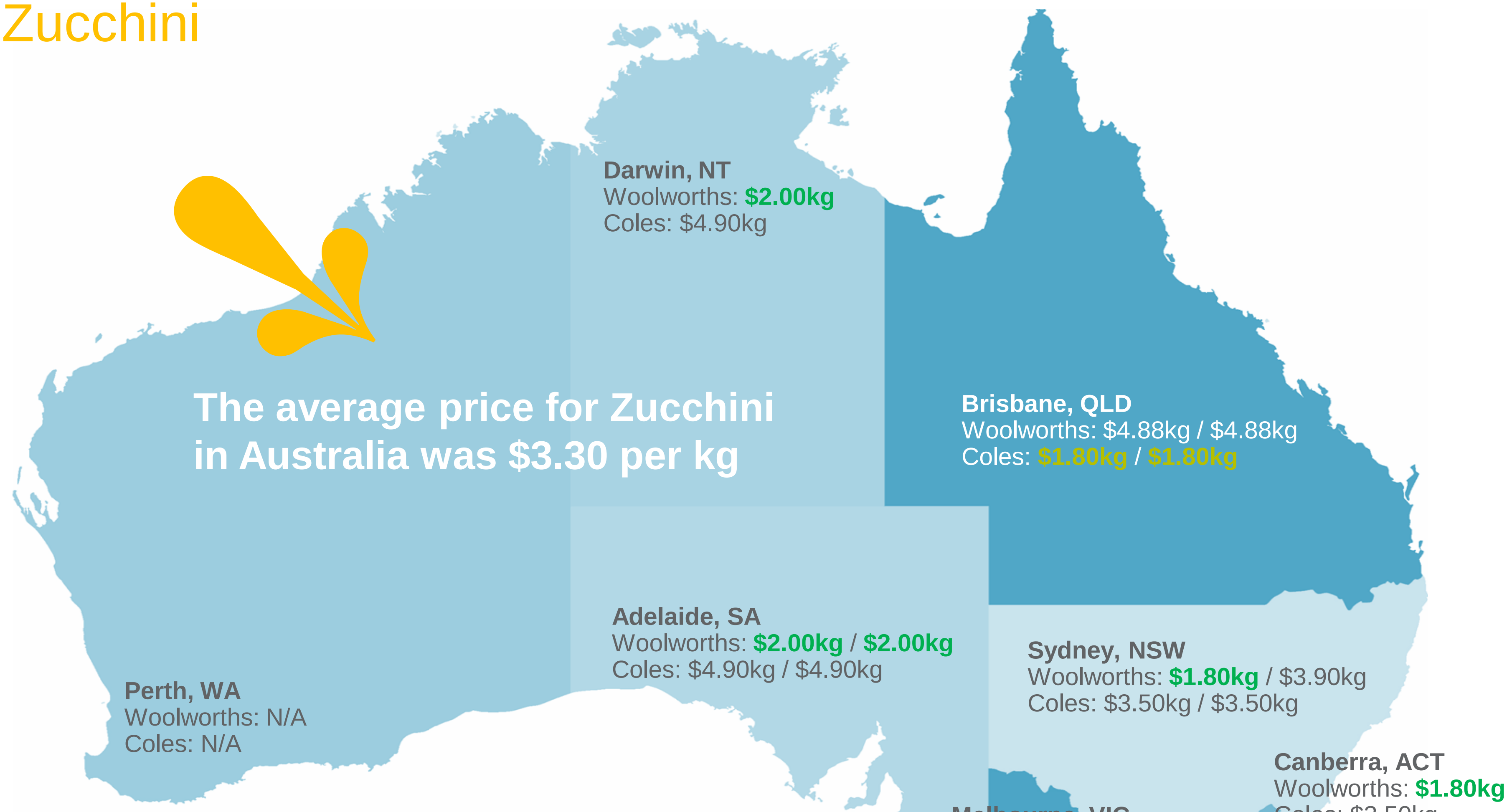


Q4b In what fresh formats do you typically purchase Zucchini?
Sample Wave 23 N=311, Wave 27 N=303 and Wave 31 N=304

Online and In-store Commodity Prices

Zucchini

The average price for Zucchini in Australia was $3.30 per kg

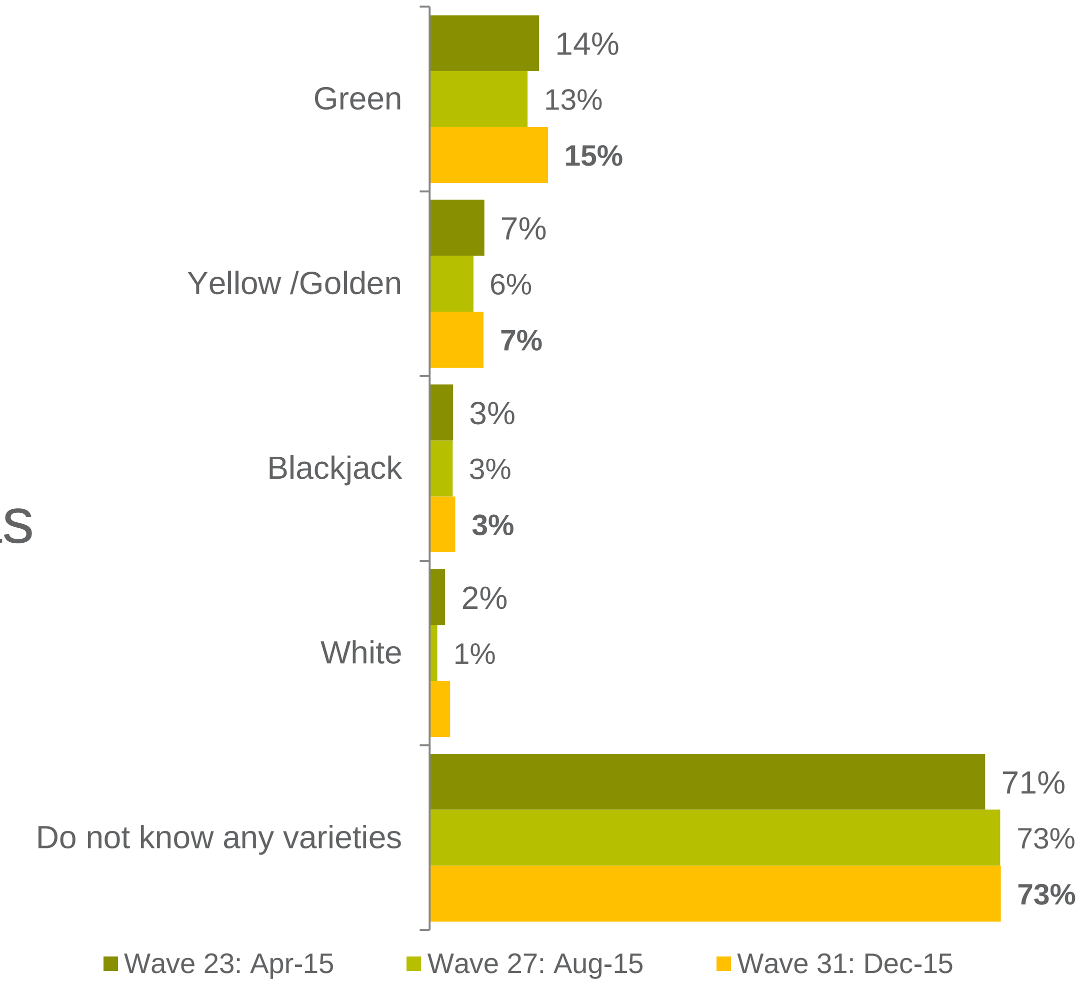


- Average price was notably lower at $3.30 per kg in December than $5.12 per kg in August 2015.
- There was a large variability in prices between states, with the most expensive price found in various states at $4.90 per kg, and the cheapest at $1.80 per kg.
- The retail price range for zucchini was $3.10 per kg.

Pricing was carried out on 15th December between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates promotional price.

Overall, awareness of zucchini varieties remains very low.

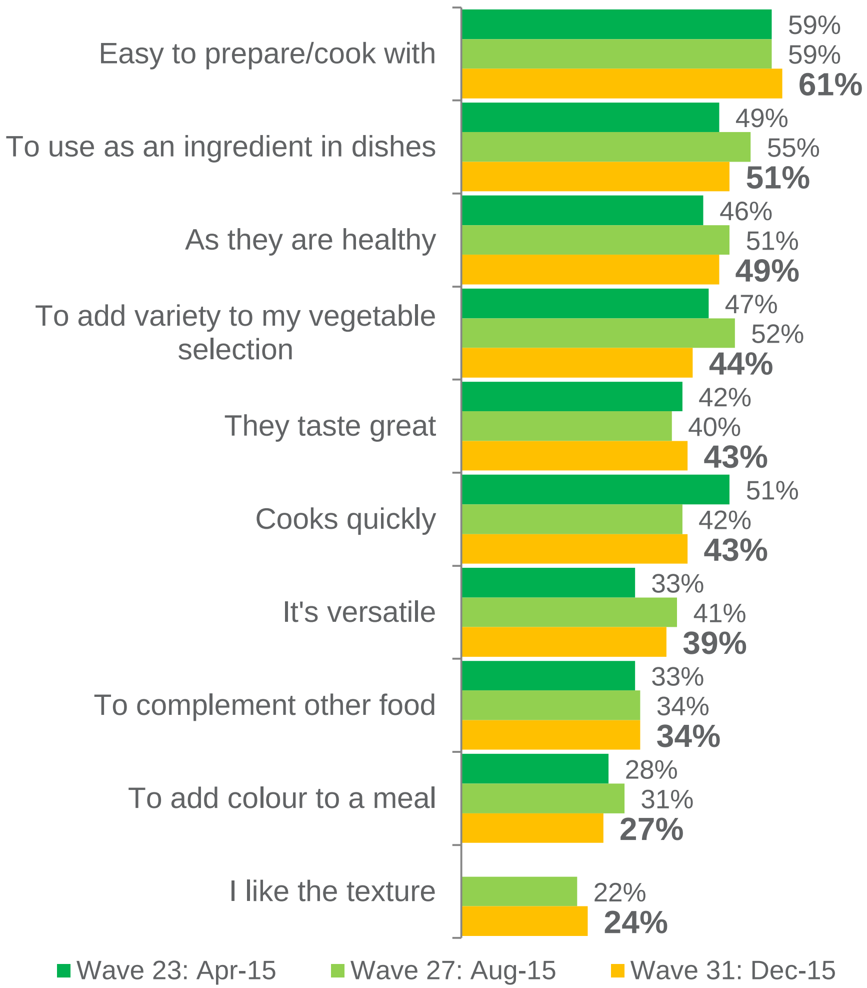
Consumers who recalled types of zucchinis did so mainly by colour. Green has the highest awareness, consistent across waves.



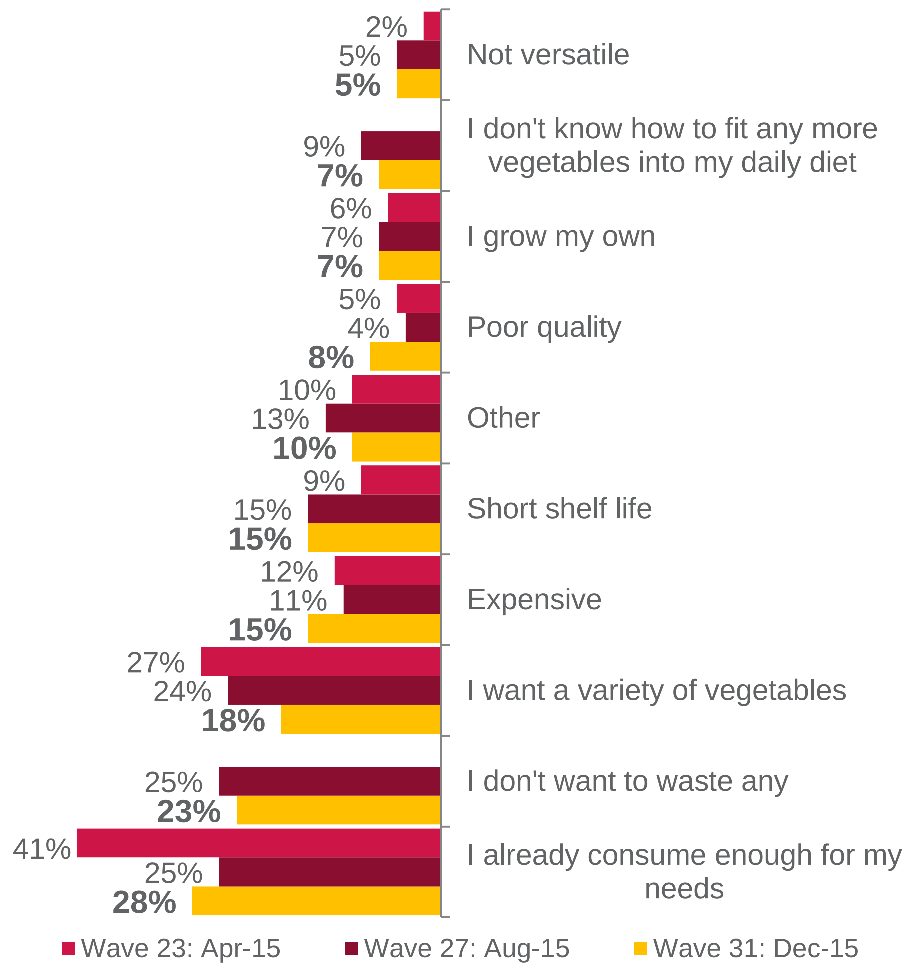
Q6a. What varieties of <commodity> are you aware of? (unprompted)
Sample Wave 23 N=311, Wave 27 N=303 and Wave 31 N=304

The ease of preparation and cooking is the dominant influence on purchase of zucchinis, while fear of wastage and consuming enough for needs are the main barriers to future purchase.

Triggers



Barriers



Q7. Which of the following reasons best describes why you purchase <commodity>?
Q8. Which reason best describes why you don't buy <commodity> more often?
Sample Wave 23 N=311, Wave 27 N=303 and Wave 31 N=304

Zucchini is generally eaten at dinner.

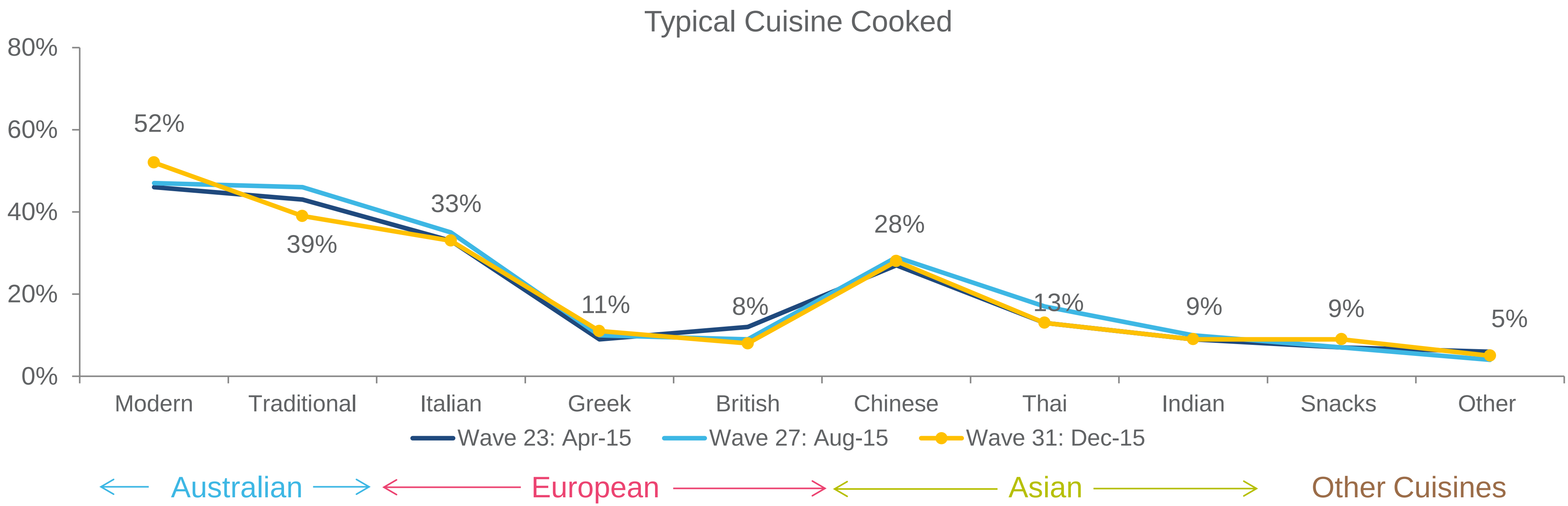
Australian, Italian and Chinese cuisines are popular for cooking with zucchini. Overall, cuisine styles have remained largely unchanged across waves.

Top 5 Consumption Occasions

	Wave 27	Wave 31
Dinner	68%	**67%**
Family Meals	58%	**59%**
Quick Meals	44%	**43%**
Weekday Meals	43%	**41%**
Lunch	36%	**28%**

17% used zucchini when cooking a new recipe

▼ 20%, Wave 27



Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?
Sample Wave 23 N=311, Wave 27 N=303 and Wave 31 N=304

Horticulture Innovation Australia

colmar brunton.

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

Zucchini is cooked multiple ways, including stir-frying, steaming, roasting and sautéing.

Carrot, onion and potato are served with zucchini.

Accompanying Vegetables

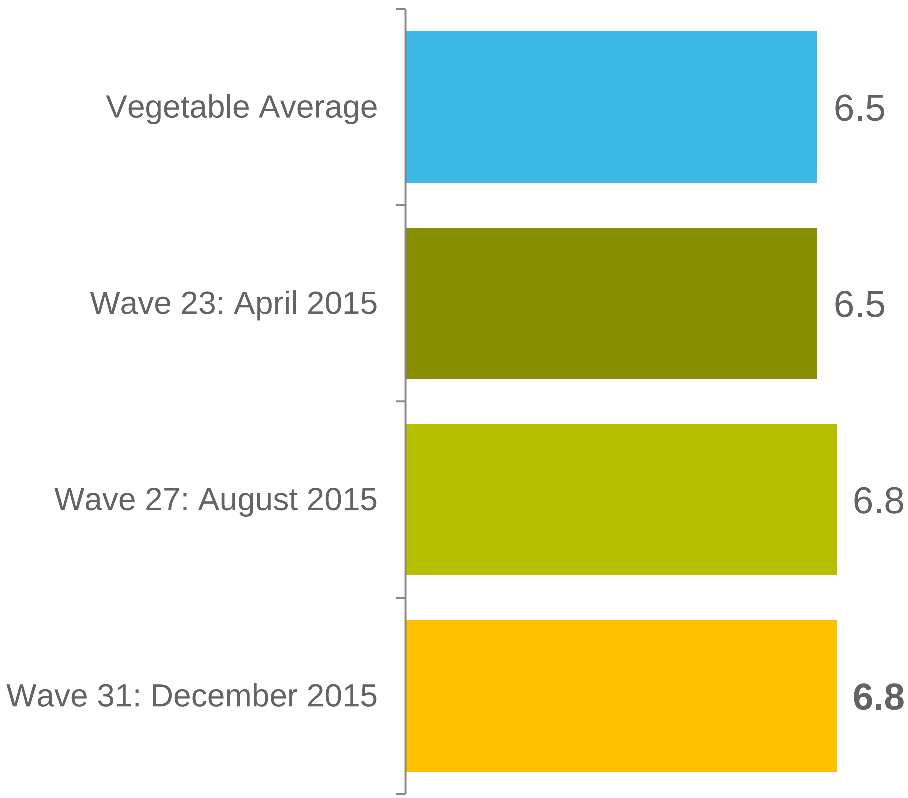
Carrot	57% ▼
Onion	44% ▼
Potato	39% –
Capsicum	33% ▲
Tomato	38% ▼

Top Cooking Styles

	Wave 23	Wave 27	Wave 31
Stir frying	46%	53%	**47%**
Steaming	39%	40%	**36%**
Roasting	25%	27%	**28%**
Sautéing	21%	25%	**26%**
Baking	25%	27%	**25%**
Frying	2%	19%	**24%**
Soup	23%	30%	**19%**
Grilling	18%	17%	**18%**
Raw	12%	13%	**16%**
Microwave	16%	12%	**16%**

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 23 N=311, Wave 27 N=303 and Wave 31 N=304

Importance of provenance has remained stable since August 2015. Consumers find provenance information important, more than the Vegetable Average.



8.0

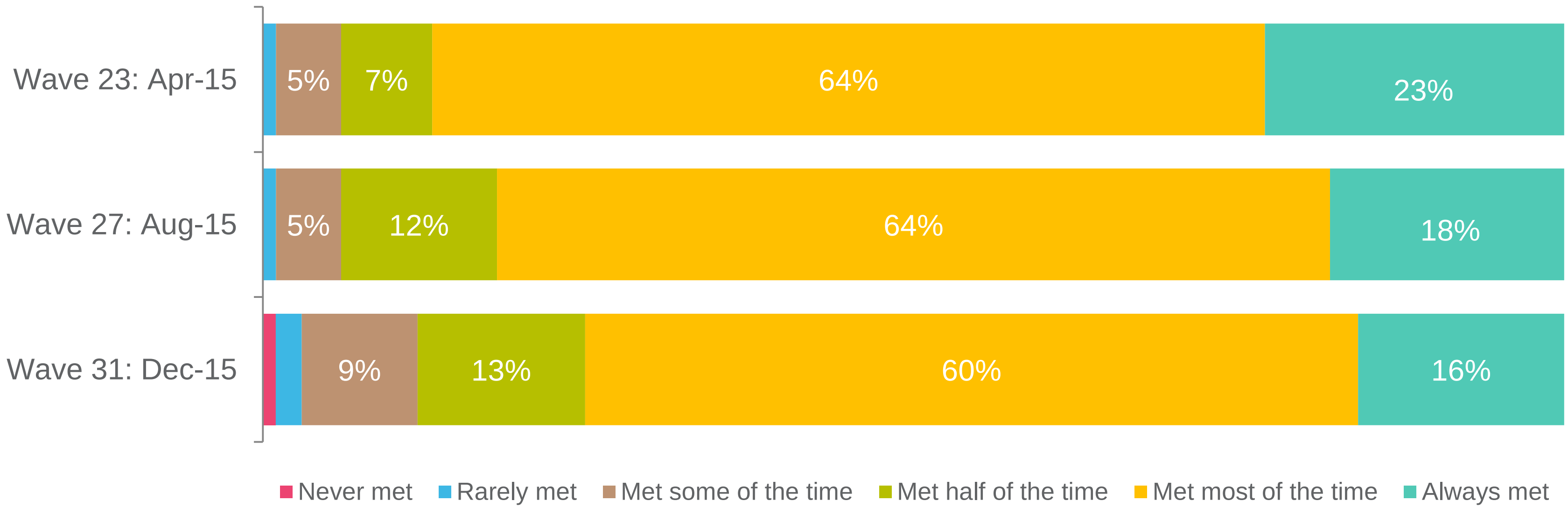
Q14. When purchasing Zucchini, how important is Provenance to you?
Q15. And when purchasing Zucchini, how important is that it is grown in Australia?
Sample Wave 23 N=311, Wave 27 N=303 and Wave 31 N=304

This month sees a decline in longevity of freshness and the likelihood of freshness expectations being met, reaching their lowest levels since April 2015.

Expected to stay fresh for **7.7** days

▲ 7.9 days, Wave 23
▲ 8.2 days, Wave 27

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 23 N=311, Wave 27 N=303 and Wave 31 N=304

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

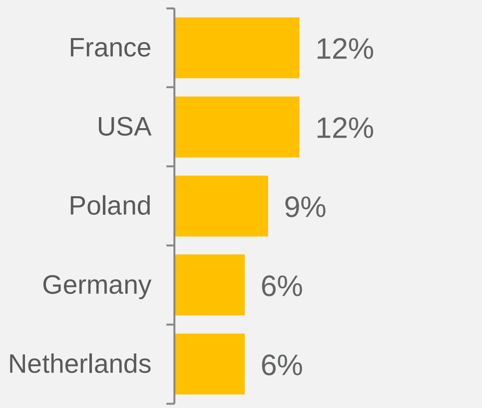
Trends: Zucchini

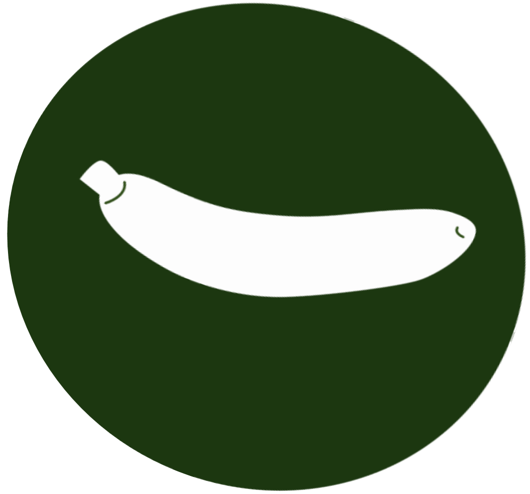
Zucchini Global Launches

October – December 2015

There were 139 zucchini products launched in the last three months. The majority of launches occurred in Europe. The key countries for launch included France, USA and Poland. Categories for launches included meals, fruit & vegetables and sauces & seasonings.

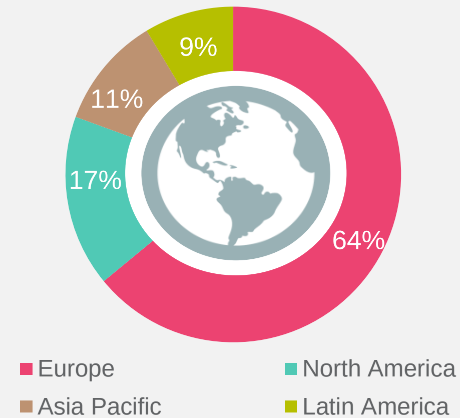
Country



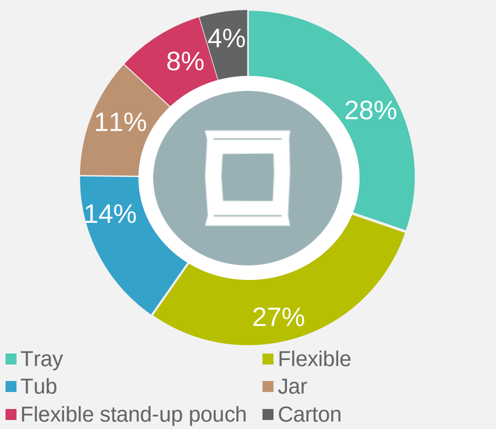


139 Global Launches

Region



Top Pack Formats



Categories

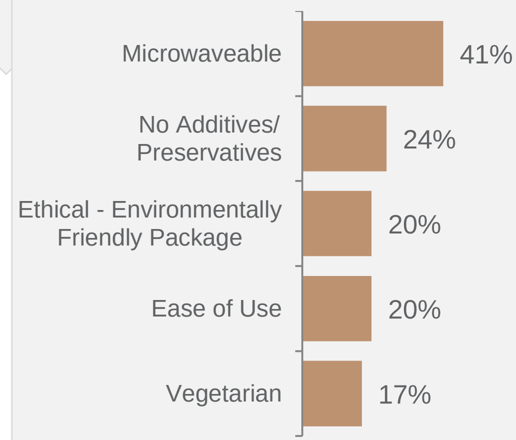
Meals 43%

Fruit & Vegetables 14%

Sauces & Seasonings 10%

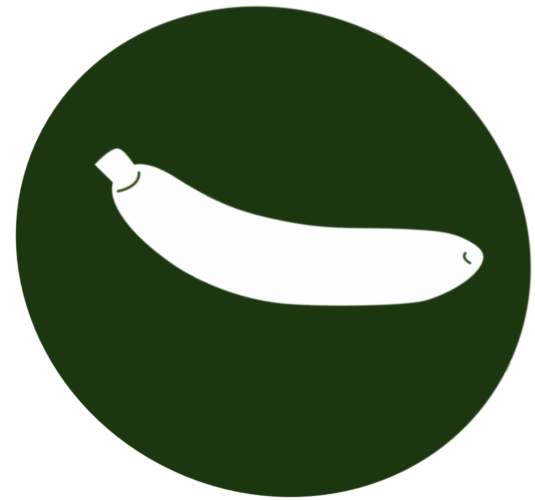
Soup 9%

Top Claims



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

- There were 139 products launched globally in the last three months. This was consistent with past trends.
- Domestically, there were two products launched that contained zucchini as an ingredient.
- Launches predominantly occurred in Europe (64%), followed by North America (17%).
- The most common packaging used for launches were tray (28%) and flexible (27%) formats.
- Meals (43%), fruit & vegetables (14%) and sauces & seasonings (10%) were the main categories for launches, consistent with past waves.
- Microwavable (41%) remained the most common claim used for products. No additives/preservatives (24%) was also frequently used.
- The most innovative launch this wave was Zucchini Fries from the USA (other examples can be found in the following pages).

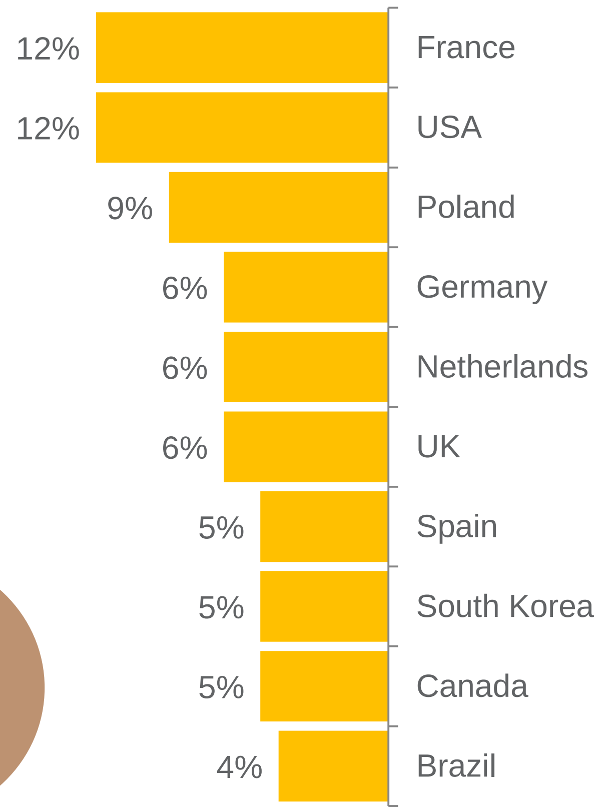


Source: Mintel (2015)

Zucchini Launches

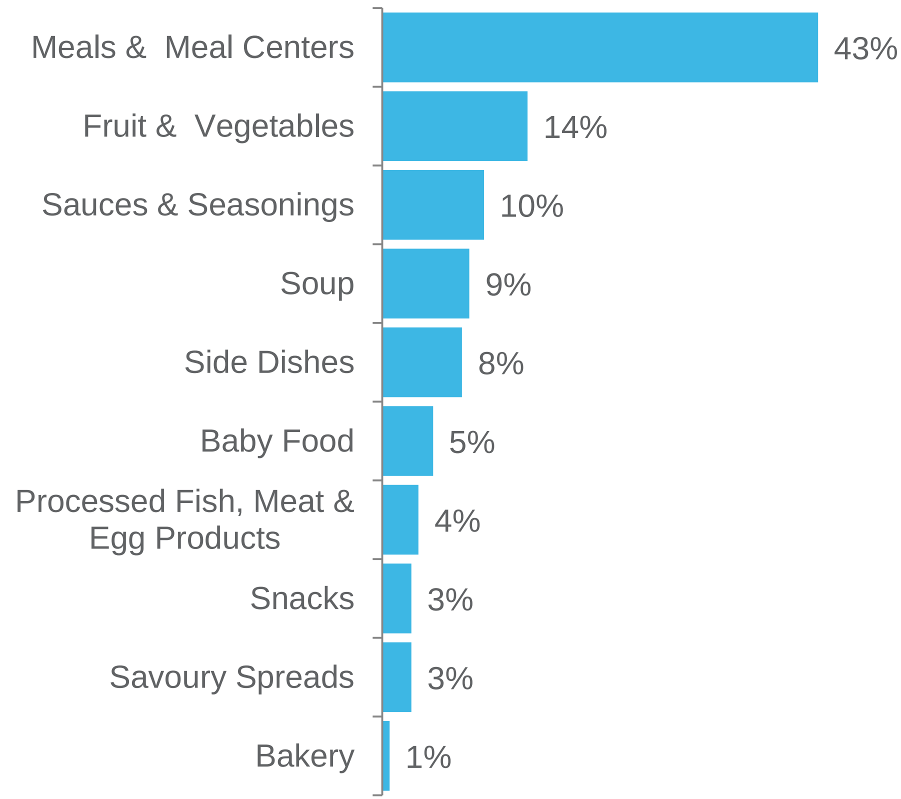
- France was the key country for launches over the last three months, consistent with the previous wave.
- Top categories for products were meals, fruit & vegetables and sauces & seasonings.

Top Launch Countries



139 Global Launches

Top Launch Categories



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

Pack Formats Used

Global	Tray	28%
Global	Flexible	27%
Global	Jar	11%
Europe	Flexible	29%
Europe	Tray	29%
Europe	Tub	18%

Top Claims Used

Global	Microwaveable	41%
Global	No Additives/Preservatives	24%
Global	Ethical - Environmentally Friendly Package	15%
Europe	Microwaveable	40%
Europe	Vegetarian	24%
Europe	Ethical - Environmentally Friendly Package	24%

Only regions with n >30 are displayed

Innovative Zucchini Launches:
L3M (October - December 2015)

Trevijano Thai Soup (Spain)

Trevijano Sopa Thai (Thai Soup) is prepared with natural ingredients including quinoa, a grain originating from the Andes, is high in fibre and is low in sugar and salt. This 100% natural and gluten-free product and retails in a 200g pack serving eight portions.

Claims:
All Natural Product, Low/No/Reduced Allergen, High/Added Fiber, Low/No/Reduced Sugar, Gluten-Free, Low/No/Reduced Sodium

From Our Chefs Szechuan Chicken & Vegetable Stir Fry (Canada)

From Our Chefs Szechuan Chicken & Vegetable Stir Fry is ready to cook and comprises fresh vegetables, chicken breast, precooked lo mein noodles, and sauce. The uncooked product is ready in eight minutes, serves two or more people and retails in an 800g pack containing 275g of vegetables, 175g of chicken, 225g of noodles and 125g of sauce.

Claims:
Ease of Use

Five Star Gourmet Foods MiniMeals2Go Grilled Chicken and Hummus (USA)

Five Star Gourmet Foods MiniMeals2Go Grilled Chicken and Hummus comprises of grilled chicken breast from poultry raised without antibiotics; roasted red pepper hummus; grilled pita bread; carrots, zucchini and tomatoes. The meal is said to be high in protein providing 20 grams of protein, 270 calories, and 6 grams of fiber per pack. This on-the-go product retails in a 2 x 8.75-oz. pack that bears the Facebook, Instagram, Pinterest, and Twitter logos.

Claims:
Social Media, High Protein, On-the-Go

M&S Wood Fired Chargrilled Vegetable & Pesto Alla Genovese Pizza (Ireland)

M&S Wood Fired Chargrilled Vegetable & Pesto Alla Genovese Pizza is made from a slow rising sourdough which is hand stretched before baking in a wood fired oven, then topped with Santarelli tomatoes from Puglia, chargrilled courgettes and peppers, balsamic onions and pesto alla genovese. This product is suitable for vegetarians, and retails in a 476g partially recyclable pack featuring the FSC logo.

Claims:
Vegetarian, Ethical - Environmentally Friendly Package

Source: Mintel (2015)

Innovative Zucchini Launches:

L3M (October - December 2015)

HiPP Junior Bio Obiadek Dumplings with Vegetables in Bologonese Sauce (Poland)

HiPP Junior Bio Obiadek Pierozki z Warzywami w Sosie Bolognese (Dumplings with Vegetables in Bolognese Sauce) are suitable for children from one to three years old. The organic certified product is made with nutritious steam-cooked vegetables and seasoned respectively for small children, and can be heated in a microwave. It has been manufactured without producing carbon emissions and retails in a 250g pack that bears the EU Green Leaf logo.

Claims:
Organic, Babies & Toddlers (0-4), Carbon Neutral, Microwaveable

Garden Lites Blueberry Oat Muffins (USA)

Garden Lites Blueberry Oat Muffins have been repackaged with an updated design. These kosher certified muffins have been made using fresh zucchini and carrots, are free from both gluten and dairy, and feature 120 calories, 5g fiber, and 5g wholegrains per serving. They can be microwaved to defrost, or done so at room temperature. This product is also free from soy and nuts, and retails in a recyclable and BPA-free 28-oz. pack containing 14 individually wrapped muffins and featuring both the Facebook and Twitter logos.

Claims:
Low/No/Reduced Allergen, Kosher, Ethical - Environmentally Friendly Package, Slimming, Microwaveable, Gluten-Free, Social Media, Wholegrain

Gestus Salami Piccante Zucchini Pizza (Denmark)

Gestus Salami Piccante Zucchini Pizza is now available. This Italian deep frozen pizza is slightly spicy, comes with zucchini and salami and is ready to eat in under 10 minutes. It retails in a 350g package

Claims:
Time/Speed

ICA Tortelloni with Grilled Vegetables (Sweden)

ICA Tortelloni med Grillade Grönsaker (Tortelloni with Grilled Vegetables) is described as a fresh pasta made with 22% eggs and filled with courgette, aubergine and peppers. It is said to be carefully prepared for the best taste and consistency experience, and can be cooked in three to four minutes. The product retails in a 250g pack that is free from bisphenol-A.

Claims:
N/A

Source: Mintel (2015)

Innovative Zucchini Launches:
L3M (October - December 2015)

Giant Eagle Zucchini Fries (USA)

Giant Eagle Zucchini Fries are now available. The product is grown in the USA and retails in a 10-oz. pack.

Claims:
N/A

Johma Premium Pasta with Chicken (Poland)

Johma Premium Makaron z Kurczakiem (Pasta with Chicken) is made with fresh pasta, chicken breast, tomatoes and basil. The product retails in a 350g pack.

Claims:
Premium

Peacock Food Collection Easy Cook Prepared Vegetables for Spicy Fish Soup (South Korea)

Peacock Food Collection Easy Cook Prepared Vegetables for Spicy Fish Soup comprise white radish, Enoki mushroom, spring onion, courgette, parsley, Cheongyang chilli pepper, red chilli pepper, garlic and crown daisy. The ready to use product retails in a 230g pack.

Claims:
Ease of Use

Hippie Foods Snacking Stir Fry Hippie Garden Chips (Canada)

Hippie Foods Snacking Stir Fry Hippie Garden Chips are made with real veggies, nuts and seeds and comprise slices of organic vegetables gently crisped to preserve their valuable nutrients, then tossed with power packed nuts and seeds in a savoury dressing to deliver a satisfying flavour and crunch. This organic, raw and sustainable product is free from gluten and GMO and retails in a 56g pack featuring the Facebook, Twitter and B Corporation Certified logos.

Claims:
Low/No/Reduced Allergen, GMO-Free, Gluten-Free, Ethical - Environmentally Friendly Product, Ethical - Human, Organic, Social Media

Source: Mintel (2015)

Australian Zucchini Launches:
L3M (October - December 2015)

Trevijano Flavours of the World Greece Mediterranean Couscous

Trevijano Flavours of the World Greece Mediterranean Couscous is 100% natural and contains no preservatives, additives or added salt. The product is suitable for vegans, is ready in five minutes and contains gluten and sesame. It is made with vegetables dehydrated through a process of hot air being applied to clean, sliced, fresh vegetables, ensuring that the fibre and mineral salts are preserved.

Claims:
No Animal Ingredients, No Additives/Preservatives, All Natural Product, Vegan, Low/No/Reduced Sodium

Beerenberg Burger Relish

Beerenberg Burger Relish is new to the range. The product is gluten-free and retails in a 260g pack.

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

Eggplant.

Whilst average purchases per month slightly increased this wave, consumption has moderately declined.

Eggplant is primarily purchased through mainstream retailers. There has been an increasing trend in purchase from independent supermarkets, whilst Aldi has slightly declined as a purchase channel over the last three waves.

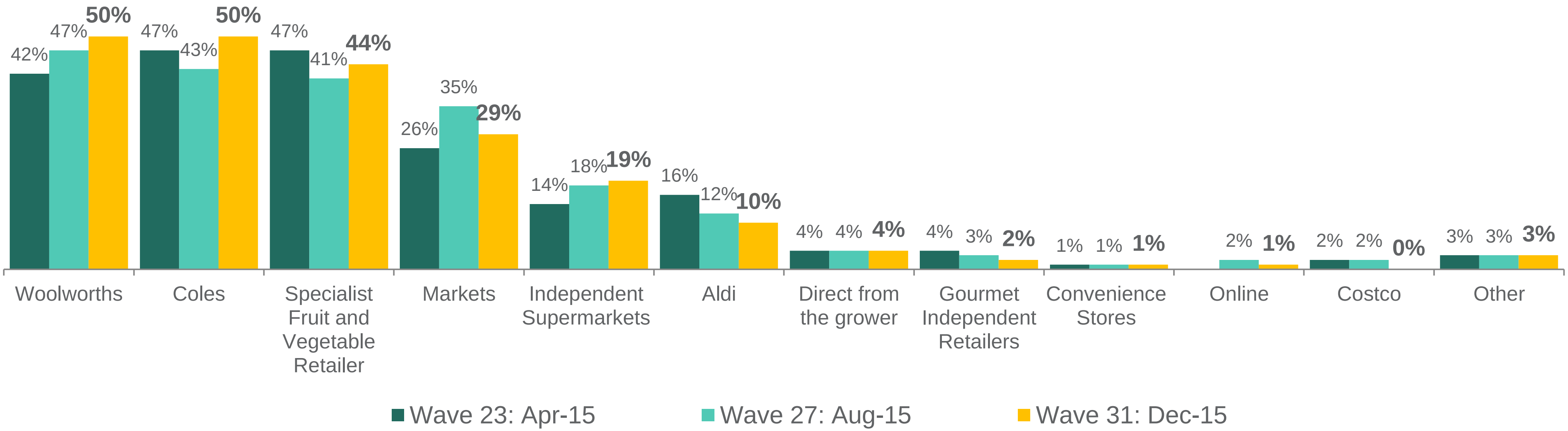
Average Purchase **2.9** times per month

▲ 3.1 times, Wave 23
▼ 2.7 times, Wave 27

Average Consumption **4.2** times per month

– 4.2 times, Wave 23
▲ 4.6 times, Wave 27

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 23 N=303, Wave 27 N=204, Wave 31 N=202

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

On average, consumers purchase **800g** of eggplant, which has slightly declined this wave.

▲ 900g, Wave 23
▲ 900g, Wave 27

Recalled last spend

Recalled last spend on eggplant purchase is **$4.00**, relatively consistent with the last wave.

▲ $4.48, Wave 23
▼ $3.90, Wave 27

Value for money

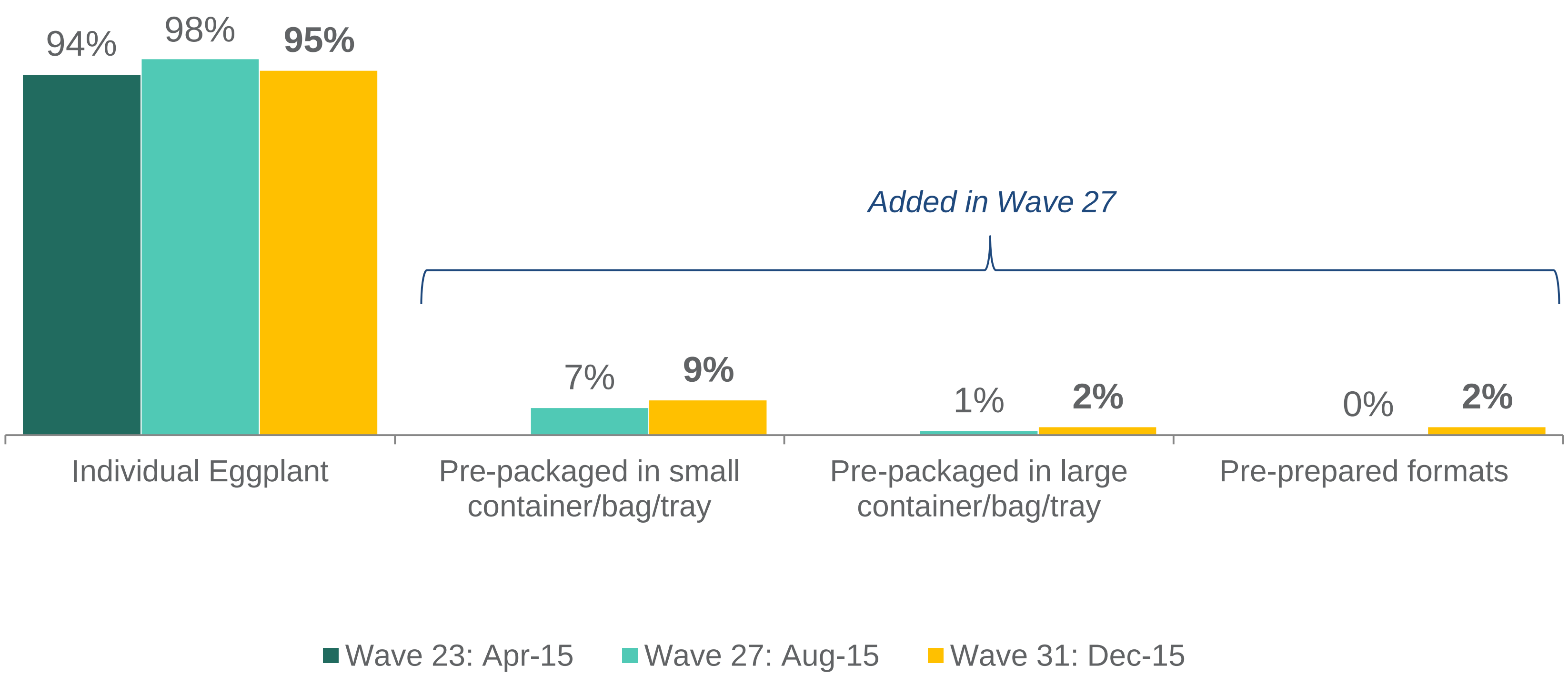
Overall consumers' perceived value for money is fair **(6.2/10)**, which remains relatively consistent with previous waves.

▼ 6.1/10, Wave 23
▲ 6.3/10, Wave 27

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 23 N=303, Wave 27 N=204, Wave 31 N=202

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

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

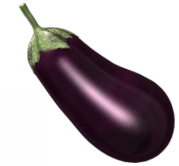


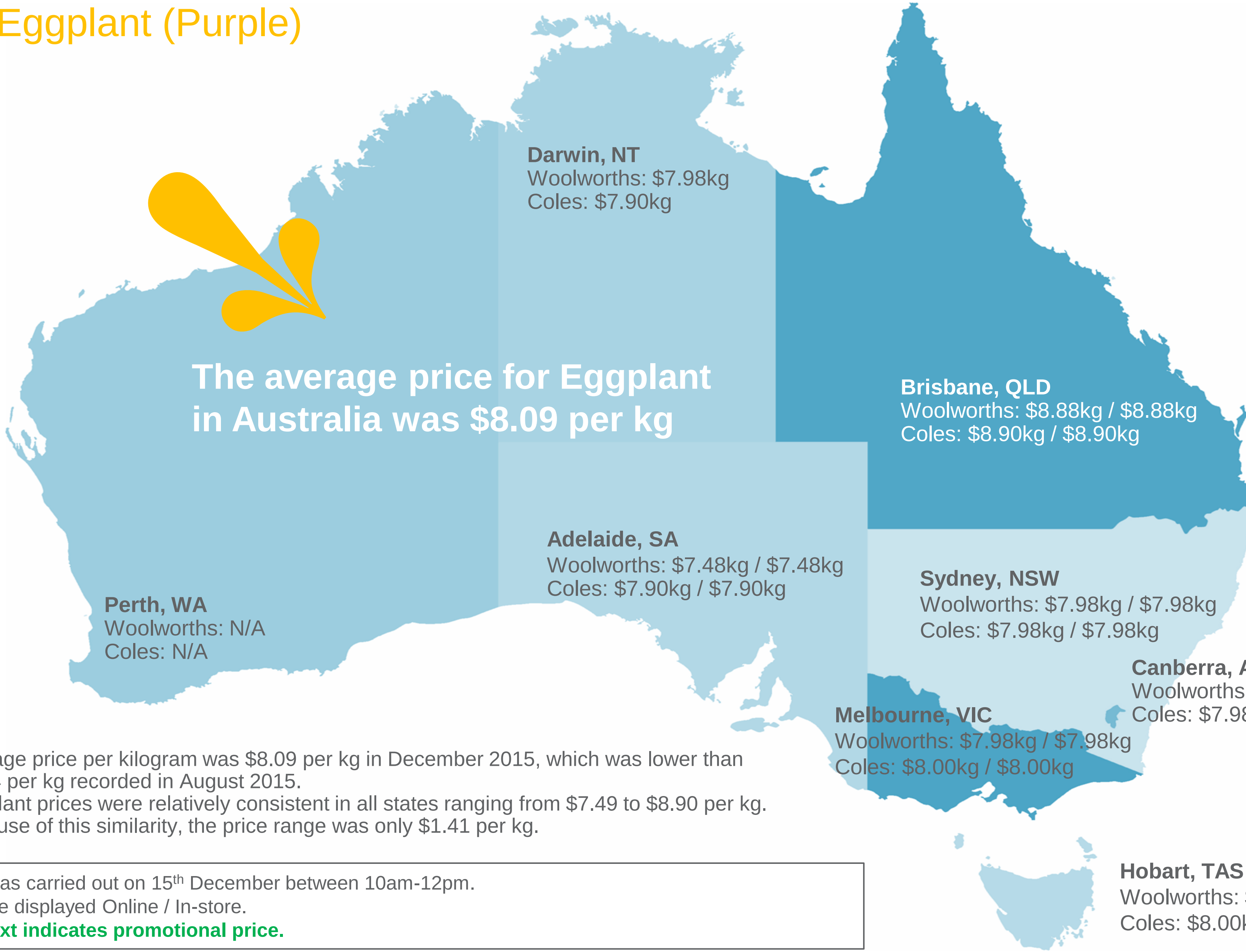
Q4b In what fresh formats do you typically purchase Eggplant?
Sample Wave 23 N=303, Wave 27 N=204, Wave 31 N=202

Horticulture Innovation Australia
colmar brunton.

Online and In-store Commodity Prices

Eggplant (Purple)



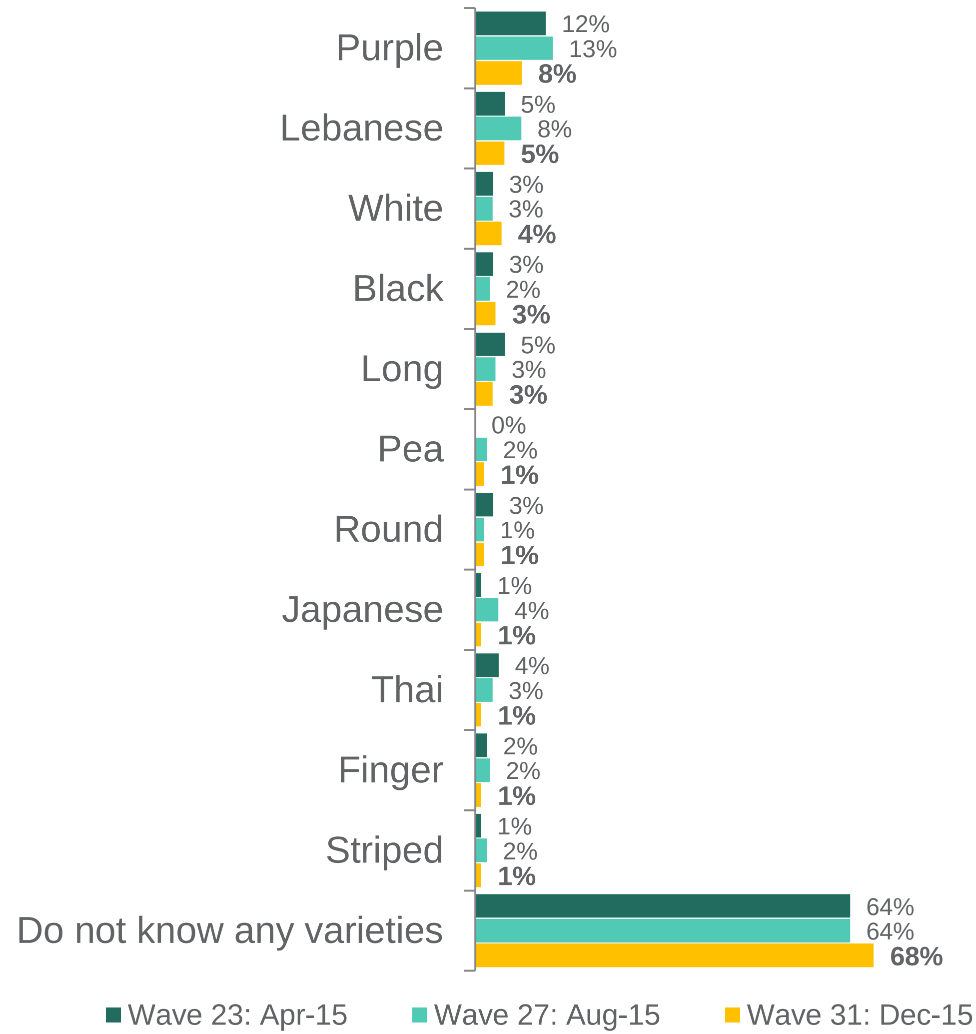


- Average price per kilogram was $8.09 per kg in December 2015, which was lower than $9.84 per kg recorded in August 2015.
- Eggplant prices were relatively consistent in all states ranging from $7.49 to $8.90 per kg.
- Because of this similarity, the price range was only $1.41 per kg.

Pricing was carried out on 15th December between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates promotional price.

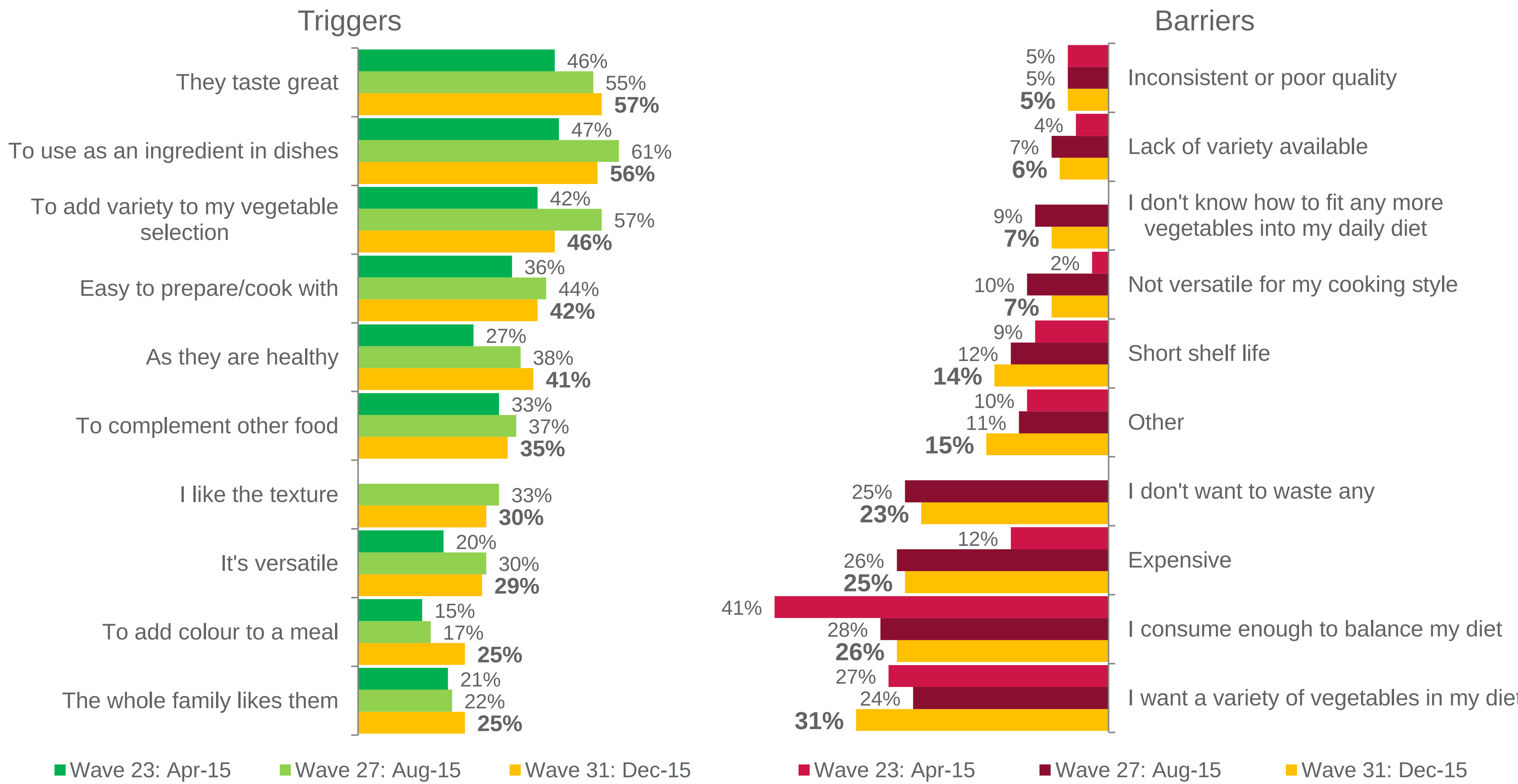
Spontaneous awareness of eggplant varieties remains low, with over two thirds of consumers unable to recall a type.

Consumers are prompted by colour and location for eggplant varieties.



Q6a. What types/varieties of <commodity> are you aware of? (unprompted)
Sample Wave 23 N=303, Wave 27 N=204, Wave 31 N=202

The key triggers to eggplant purchase are taste and to use as an ingredient in dishes. Wanting a variety and already consuming enough are the main barriers. Health is becoming a more prominent factor in why consumers choose to purchase eggplant, whilst short shelf life is increasingly becoming a barrier 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 23 N=303, Wave 27 N=204, Wave 31 N=202

Eggplant is typically used in Italian, Modern Australian and Greek cuisine. This has remained relatively consistent over all waves.

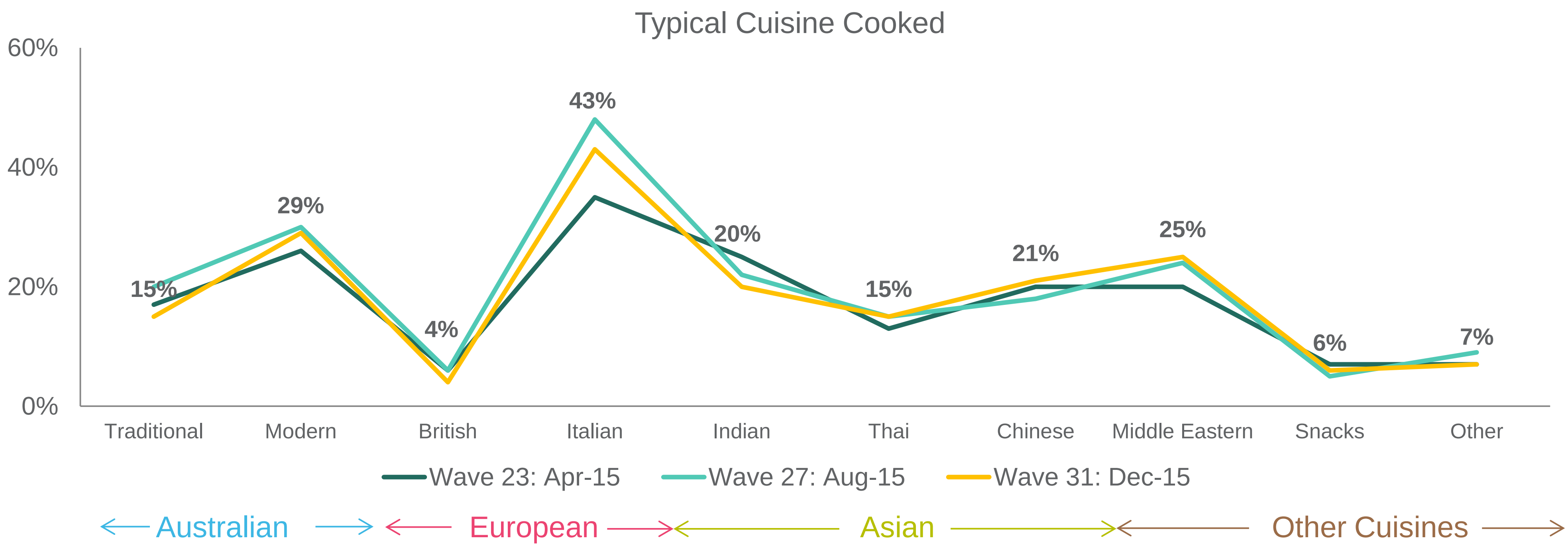
Dinner remains the main consumption occasion, whilst one fifth of consumers use eggplant when cooking a new recipe.

Top 5 Consumption Occasions

	Wave 27	Wave 31
Dinner	66%	**61%**
Family Meals	60%	**54%**
Weekday Meals	39%	**35%**
Quick Meals	26%	**25%**
Weekend Meals	31%	**24%**

21% used eggplant when cooking a new recipe

▲ 22%, Wave 27



Q10. What cuisines do you cook/consume that use <commodity> ?
Q11. Which of the following occasions do you typically consume/use <commodity> ?
Sample Wave 23 N=303, Wave 27 N=204, Wave 31 N=202

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

Eggplant is generally served with tomatoes, onions and capsicums. Consumers prefer to fry, grill and stir fry eggplant, with the latter steadily increasing across the last three waves.

Accompanying Vegetables

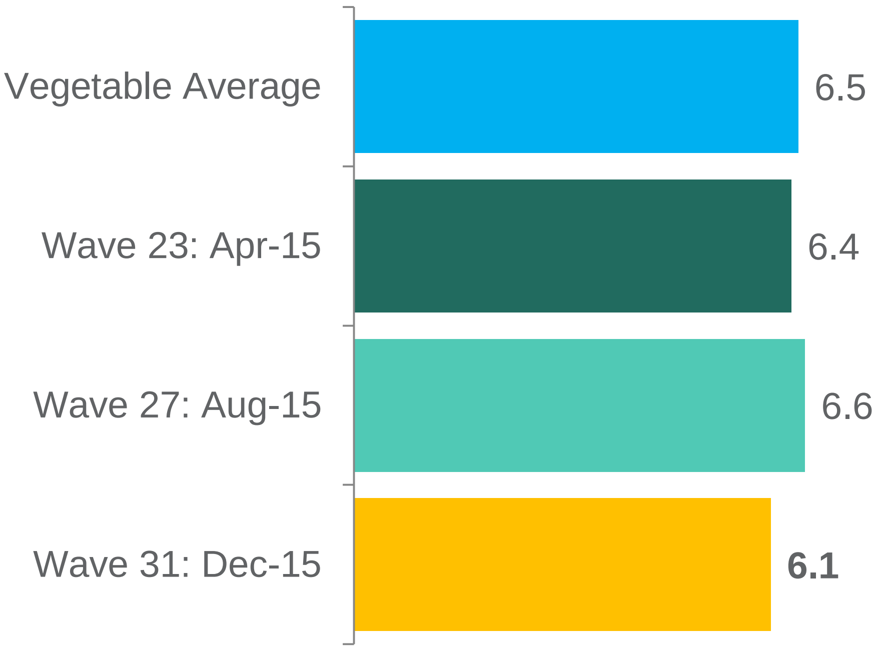
Tomato	56%
Onion	56%
Capsicum	37%
Zucchini	40%
Garlic	34%

Top Cooking Styles

	Wave 23	Wave 27	**Wave 31**
Frying	13%	40%	**46%**
Grilling	37%	40%	**40%**
Stir frying	27%	35%	**38%**
Roasting	34%	38%	**36%**
Baking	37%	39%	**36%**
Sautéing	20%	27%	**25%**
Slow Cooking	19%	27%	**23%**
Steaming	7%	8%	**13%**
Boiling	9%	6%	**9%**
Other	8%	4%	**9%**

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 23 N=303, Wave 27 N=204, Wave 31 N=202

The importance of provenance has declined in Wave 31, which now sits below the Vegetable Average. However, knowing that eggplants are grown in Australia remains highly important information for consumers.



7.7

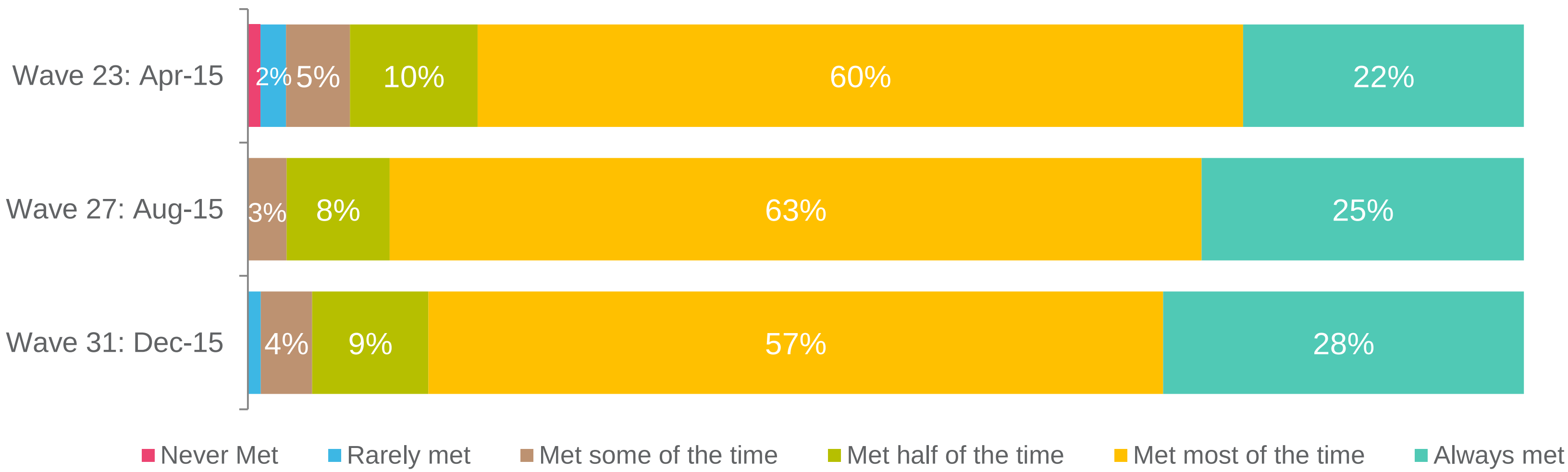
Q14. When purchasing Eggplant, how important is Provenance to you?
Q15. And when purchasing Eggplant, how important is that it is grown in Australia?
Sample Wave 23 N=303, Wave 27 N=204, Wave 31 N=202

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

Expected to stay fresh for **7.6** days

▲ 7.9 days, Wave 23
▲ 7.7 days, Wave 27

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 23 N=303, Wave 27 N=204, Wave 31 N=202

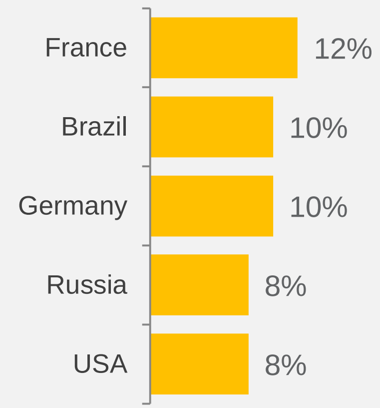
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Trends: Eggplant

Eggplant Global Launches
October – December 2015

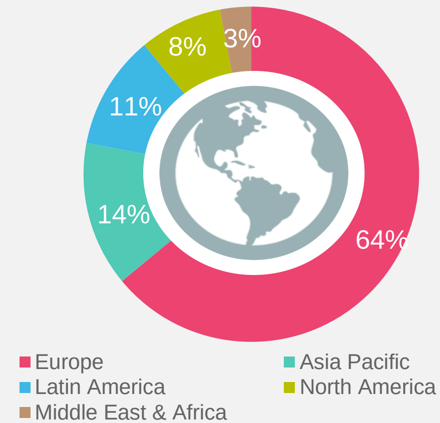
There were 100 products that contained Eggplant as an ingredient launched globally over the last three months. The majority of those launches occurred in Europe. Products launched include meals, sauces, and savoury spreads.

Country

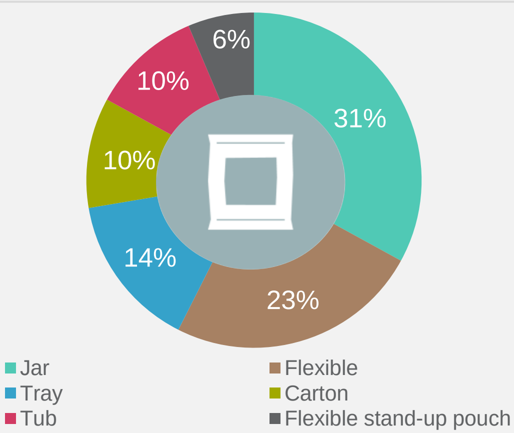


100 Global Launches

Region



Top Pack Formats



Categories

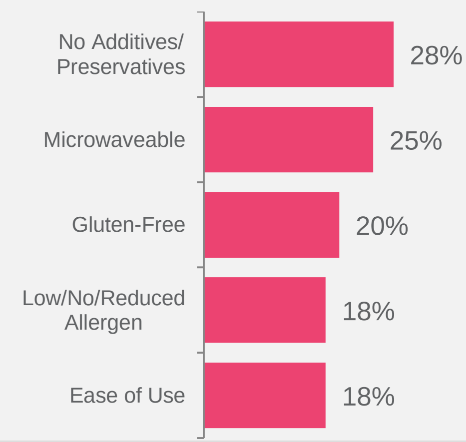
Meals 26%

Sauces & Seasonings 19%

Savoury Spreads 16%

Fruit & Vegetables 14%

Top Claims



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

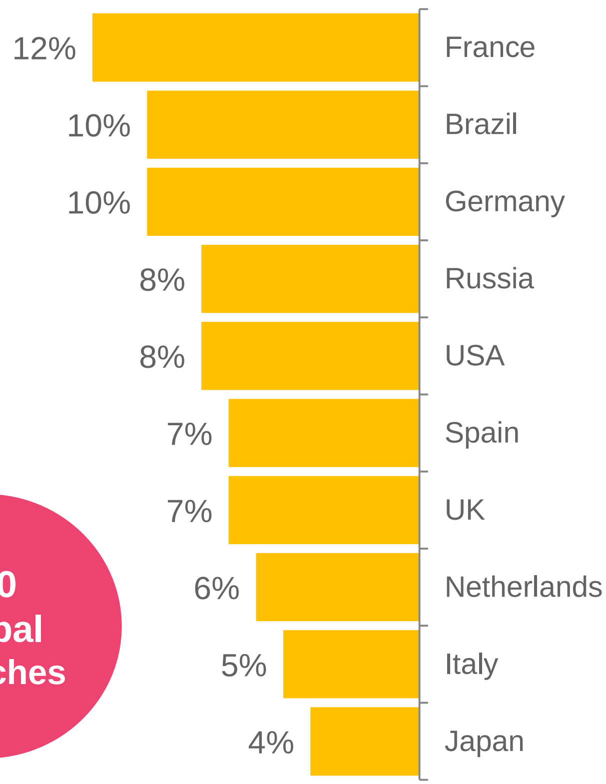
- There were 100 eggplant products launched globally in the last three months.
- There was one product launched in Australia this wave.
- The majority of eggplant launches occurred in Europe (64%) and Asia Pacific (14%).
- Categories for launches were meals (26%), sauces and seasonings (27%), and savoury spreads (16%).
- Key claims used on products included no additives/preservatives (28%), microwaveable (25%) and gluten-free (20%).
- A variety of packaging formats were used including jars (31%), flexible packaging (23%) and trays (14%).
- The most innovative launches included an Eggplant Juice Drink from Indonesia and Goji Berry Slimming Tablets from Brazil (other examples can be found in the following pages).

Source: Mintel (2015)

Eggplant Launches

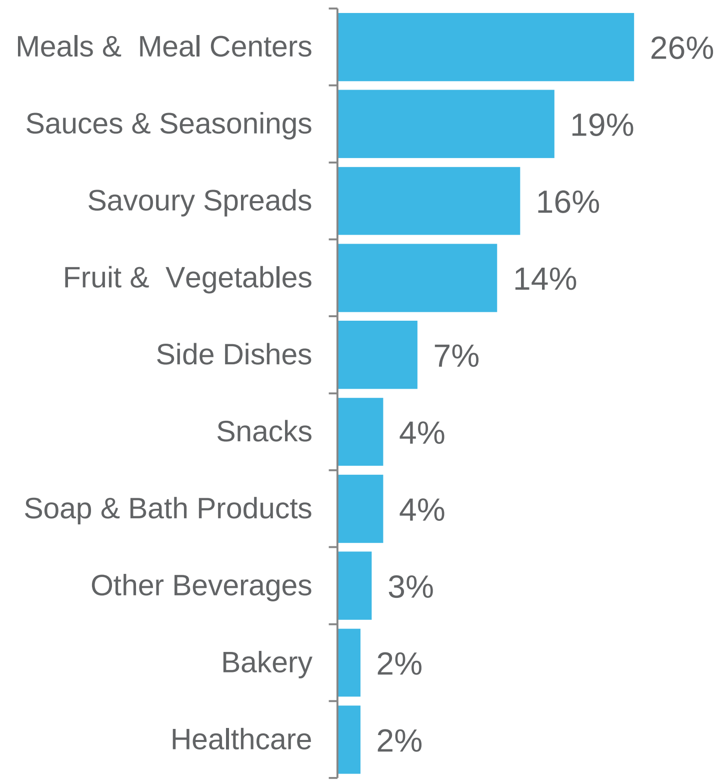
- Countries with the greatest number of launches were France, Brazil and Germany.
- Products launched were primarily meals, sauces, and savoury spreads.

Top Launch Countries



100 Global Launches

Top Launch Categories



Jars, flexible and tray packaging formats were most commonly used for launch products, consistent with the previous wave. No additives/ preservatives and microwaveable were the key claims used.

Pack Formats Used

Global	Jar	31%
Global	Flexible	23%
Global	Tray	14%
Europe	Jar	34%
Europe	Flexible	22%
Europe	Tray	17%

Top Claims Used

Global	No Additives/Preservatives	28%
Global	Microwaveable	23%
Global	Ease of Use	15%
Europe	Microwaveable	28%
Europe	No Additives/Preservatives	25%
Europe	Ease of Use	19%

Only regions with n >30 are displayed

Innovative Eggplant Launches:
L3M (October – December 2015)

Buitoni Mediterranean Vegetable Sauce (Italy)

Buitoni Salsa alle Verdure Mediterranee (Mediterranean Vegetable Sauce) is now available in a newly designed 180g pack. This product is free from gluten and preservatives.

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

Maestro di Modena Vegetable Wholegrain Pizza (Spain)

Maestro di Modena Pizza Integral Verduras (Vegetable Wholegrain Pizza) is now available. The product retails in a 420g pack.

Claims:
Wholegrain

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

Extra Special Pizza Parmigiana (Mexico)

Extra Special Pizza Parmigiana is Italian made, thin crust pizza that has been baked in a wood-fired oven. It comprises seasoned eggplant, pimiento peppers, champignon mushrooms, black olives, mozzarella cheese, and Italian cheese selection. It retails in a 430g pack featuring cooking instructions.

Claims:
Premium

Source: Mintel (2015)

Innovative Eggplant Launches:
L3M (October – December 2015)

Pronatura Les Cuisinés de Producteurs Aubergine Bread Cooked in Provence Mix (France)

Pronatura Les Cuisinés de Producteurs Préparation pour Pain d'Aubergine Cuisiné en Provence (Aubergine Bread Cooked in Provence Mix) is made with fresh vegetables including aubergines cultivated in Vergèze in the Gard region of France, by Pierre Olivier Audema. The Ecocert and organic certified product is rich in fresh vegetables, contains no colouring or preservative, and retails in a 570g pack containing one jar with tomato sauce and one jar with an eggplant bread mix.

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

Le Specialità di Beppe Pronti al Volo I Contorni Frozen Grilled Mixed Vegetables (Italy)

Le Specialità di Beppe Pronti al Volo I Contorni Grigliatissima di Verdure Surgelate (Frozen Grilled Mixed Vegetables) are now available. This product is free from added fats and gets ready in five minutes in a pan. It retails in a 450g pack.

Claims:
Low/No/Reduced Fat, Time/Speed

Tui Alimentos Natural Gourmet Aubergine Risotto (Brazil)

Tui Alimentos Natural Gourmet Risotto de Berinjela (Aubergine Risotto) is said to be easy and quick to prepare. The product contains no gluten or added sugar, and retails in a 235g pack that serves four.

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

Nutrigold Goji Berry Slimming Tablets (Brazil)

Nutrigold Comprimido Seca Barriga com Goji Berry (Goji Berry Slimming Tablets) are made with thermogenic mixed flours and contains no mercury and heavy metals. This vegan product is purified, free from gluten and retails in a pack containing 180 tablets of 800mg each.

Claims:
Gluten-Free, Vegan, Low/No/Reduced Allergen, No Animal Ingredients, Slimming

Source: Mintel (2015)

Innovative Eggplant Launches:
L3M (October – December 2015)

Hortex Stir-Fry Vegetables with Grilled Eggplants (Russia)

Hortex Ovoshchi dlya Zharki s Baklazhanami (Stir-Fry Vegetables with Grilled Eggplants) have been repackaged with a new design. The mix comprises vegetables, fried potatoes, eggplants and spices. The product retails in a 400g pack.

Claims:
N/A

DHC Energy & Beauty Acai Smoothie Mix (Japan)

DHC Energy & Beauty Acai Smoothie Mix features acai and nine types of fruits. It also contains royal jelly, coenzyme Q10, carnitine and ribose for energy support, and 2600mg dietary fibre, 50mg fermented vegetable extract and 10mg fermented grains extract for health support. This preservative free product, which can be prepared in water, retails in a 300g pack. Launched on August 11, 2015 with an RRP of 2,592 yen.

Claims:
No Additives/Preservatives, Other (Functional)

Angon Pickled Hot and Sour Eggplant (Vietnam)

Angon Ca Dam Chua Cay (Pickled Hot and Sour Eggplant) has been repackaged in a newly designed 500g pack. The ready-to-eat product has been listed as Vietnam's high quality product.

Claims:
Ease of Use

Pohon Pinang Dutch Eggplant Juice Drink (Indonesia)

Pohon Pinang Jus Terong Belanda (Dutch Eggplant Juice Drink) is now available. This halal certified product is retailed in 600ml pack.

Claims:
Halal

Source: Mintel (2015)

Spring Onion.

On average, spring onions are purchased three times a month, and are consumed nine times per month.

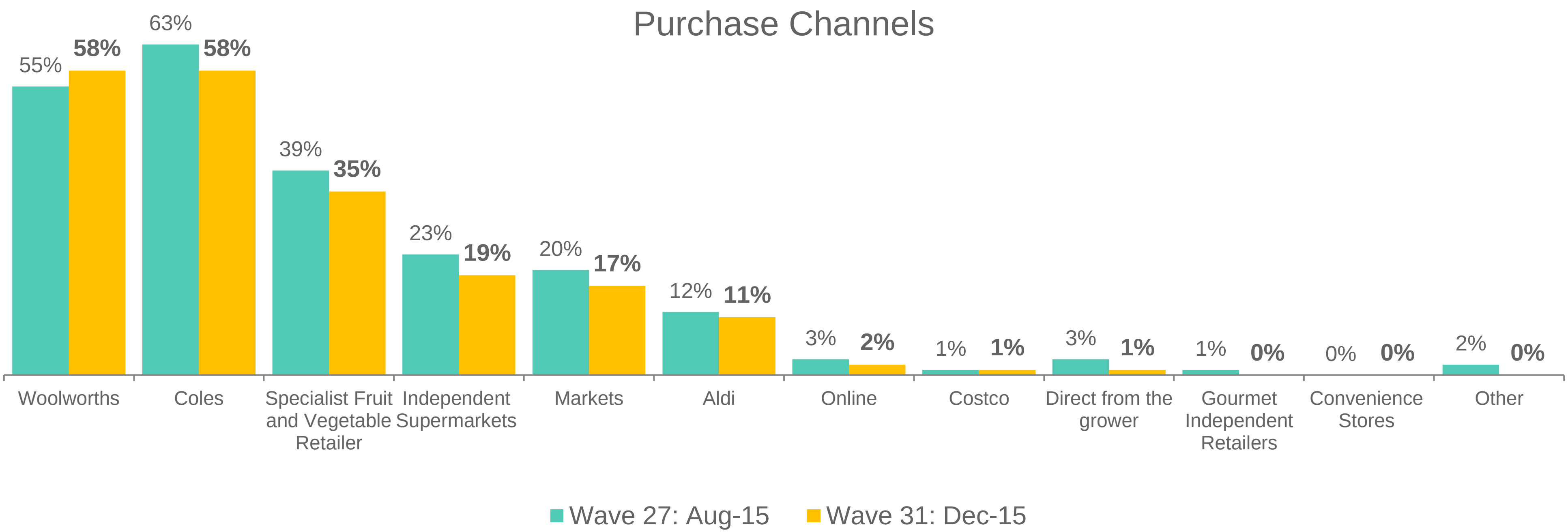
Spring onions are generally purchased from mainstream retailers such as Woolworths and Coles. Specialist fruit and vegetable retailers are also a popular purchase channel.

Average Purchase **3.2** times per month

▼ 2.8 times, Wave 27

Average Consumption **8.9** times per month

▼ 7.6 times, Wave 27



Q1. On average, how often do you purchase Spring Onion?
Q2. On average, how often do you consume Spring Onion?
Q5. From which of the following channels do you typically purchase Spring Onion?
Sample Wave 27 N=203, Wave 31 N=202

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 **400g** of spring onions, consistent with the previous wave.

400g, Wave 27

Recalled last spend

Recalled last spend on spring onions was **$2.80**, slightly higher than the last wave.

▼ $2.40, Wave 27

Value for money

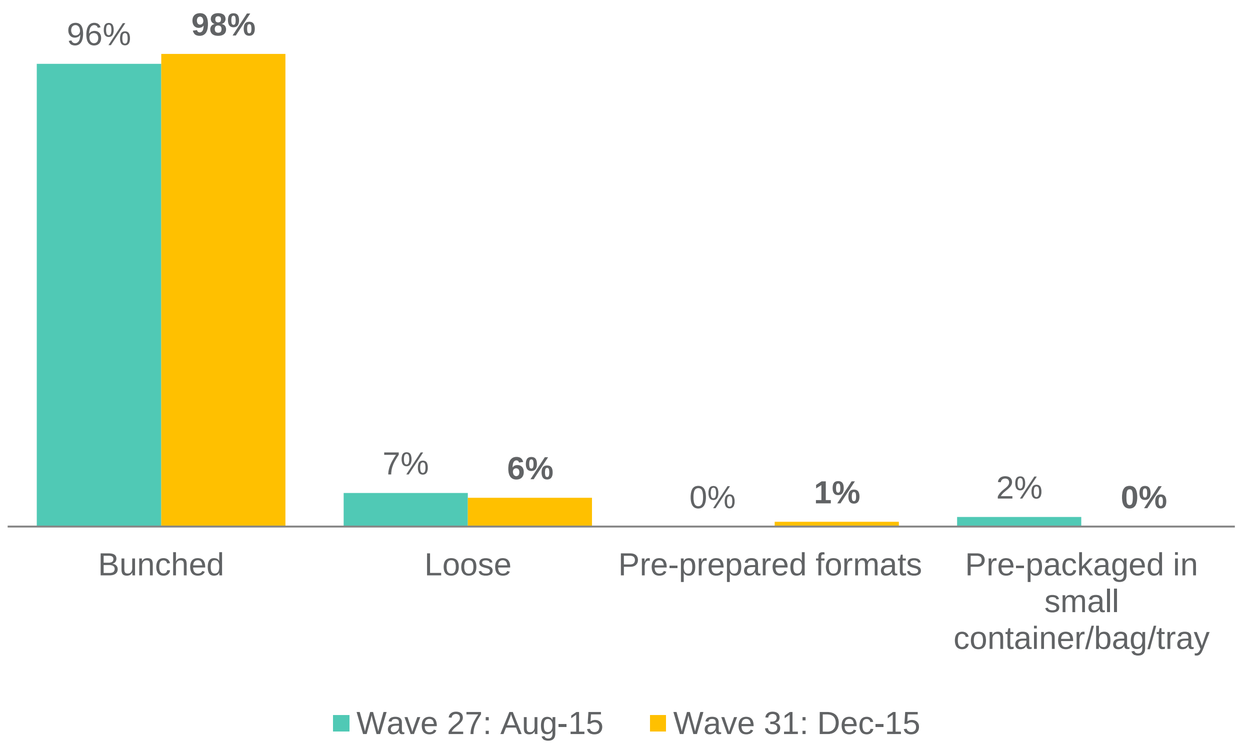
Consumers' perceived value for money is fair for spring onions **(6.1/10)**.

▲ 6.2/10, Wave 27

Q3. How much Spring Onion do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 27 N=203, Wave 31 N=202

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

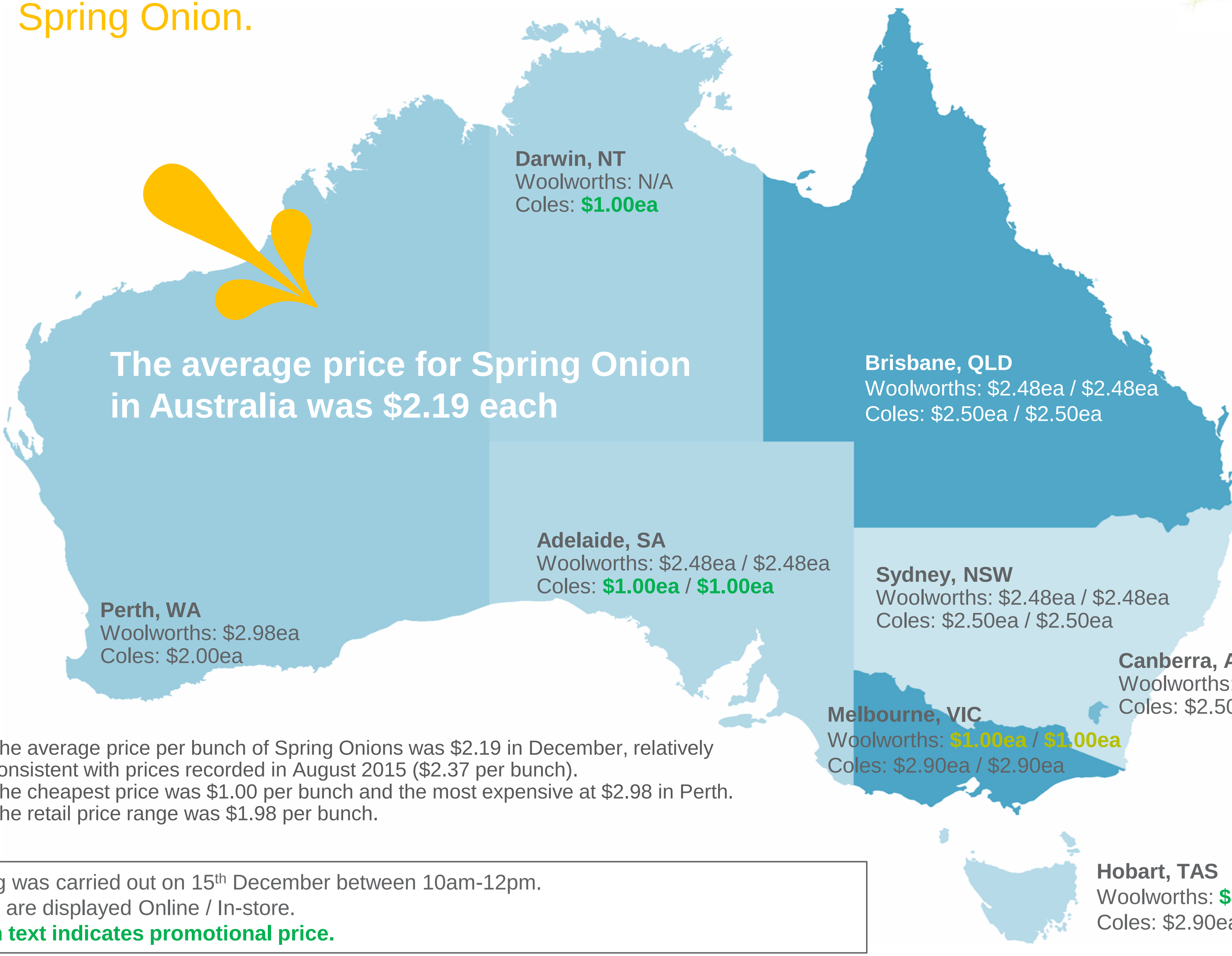
Bunched spring onions are the most common purchase format, this may be due to the lack of other format options available in stores.



Q4b In what fresh formats do you typically purchase Spring Onion?
Sample Wave 27 N=203, Wave 31 N=202

Online and In-store Commodity Prices.

Spring Onion.



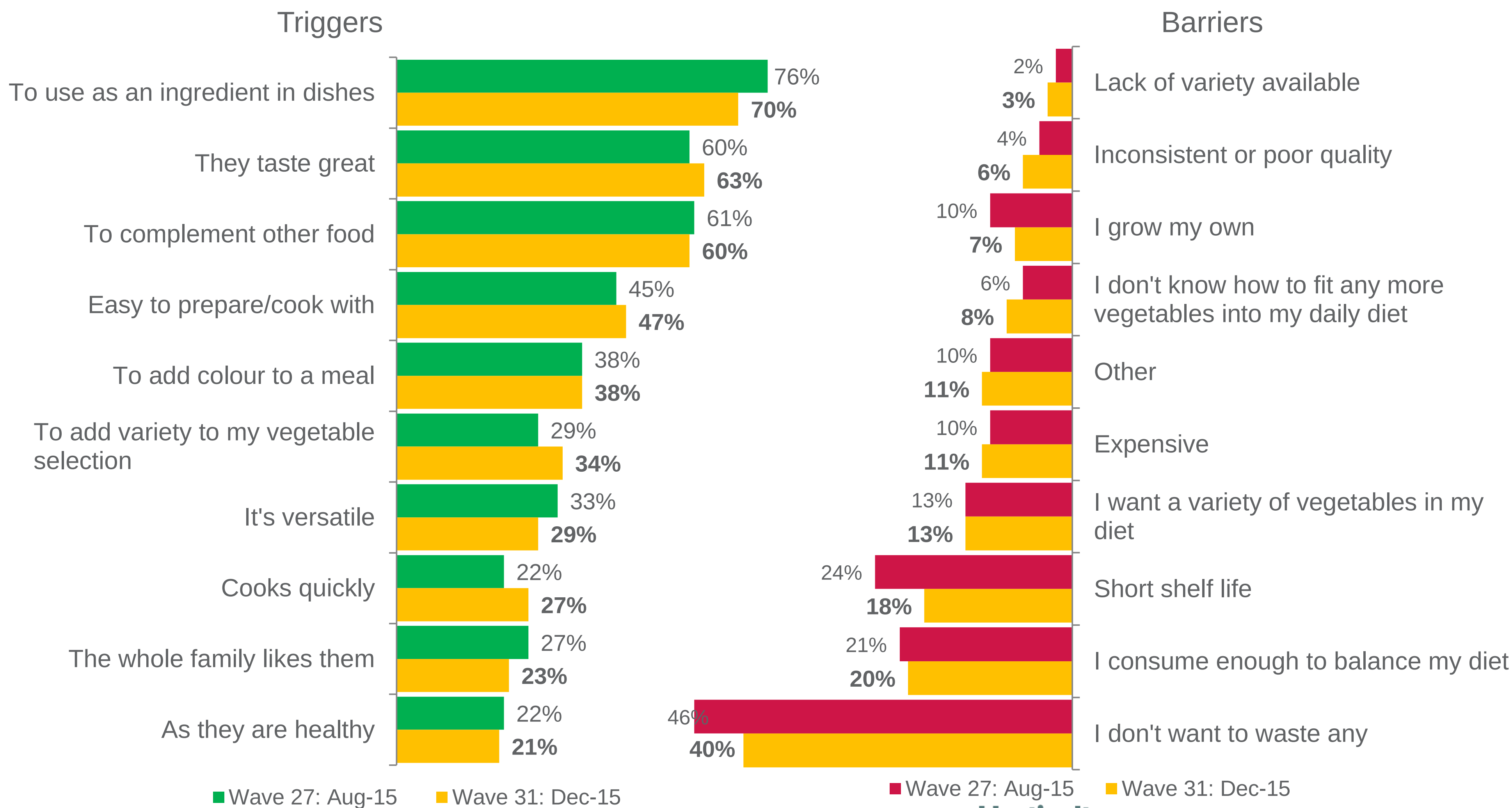
- The average price per bunch of Spring Onions was $2.19 in December, relatively consistent with prices recorded in August 2015 ($2.37 per bunch).
- The cheapest price was $1.00 per bunch and the most expensive at $2.98 in Perth.
- The retail price range was $1.98 per bunch.

Pricing was carried out on 15th December between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates promotional price.

Awareness of spring onion varieties remains low, with 82% of consumers unable to recall a type. However, this has slightly improved since Wave 27 (85%).

Q6a. What varieties of Spring Onion are you aware of? (unprompted)
Sample Wave 27 N=203, Wave 31 N=202

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



Q7. Which of the following reasons best describes why you purchase Spring Onion?
Q8. Which reason best describes why you don't buy Spring Onion more often?
Sample Wave 27 N=203, Wave 31 N=202

Asian and Australian cuisine are most popular for spring onion dishes, consistent with the previous wave.

Meal occasions tend to occur during dinner.

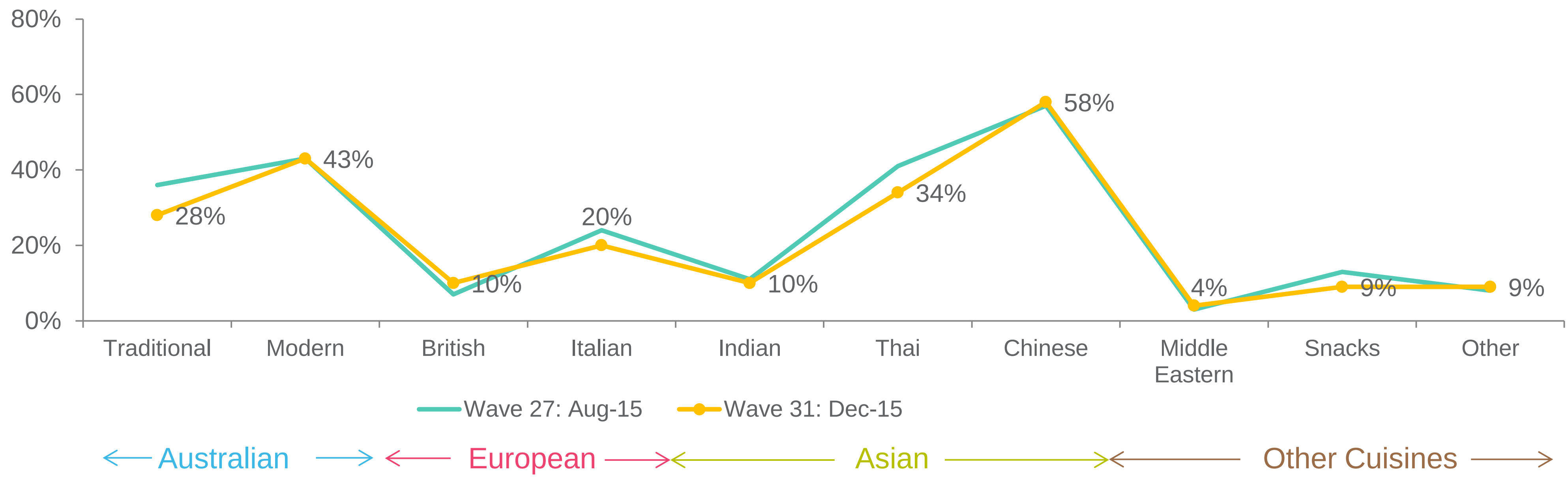
Top 5 Consumption Occasions

	Wave 27	Wave 31
Dinner	67%	**71%**
Family Meals	61%	**58%**
Quick Meals	53%	**56%**
Weekday Meals	42%	**44%**
Weekend Meals	41%	**40%**

29% used spring onions when cooking a new recipe

▼ 25%, Wave 27

Typical Cuisine Cooked



Q10. What cuisines do you cook/consume that use Spring Onion?
Q11. Which of the following occasions do you typically consume/use Spring Onion?
Sample Wave 27 N=203, Wave 31 N=202

Horticulture Innovation Australia

colmar brunton.

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

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

Accompanying Vegetables

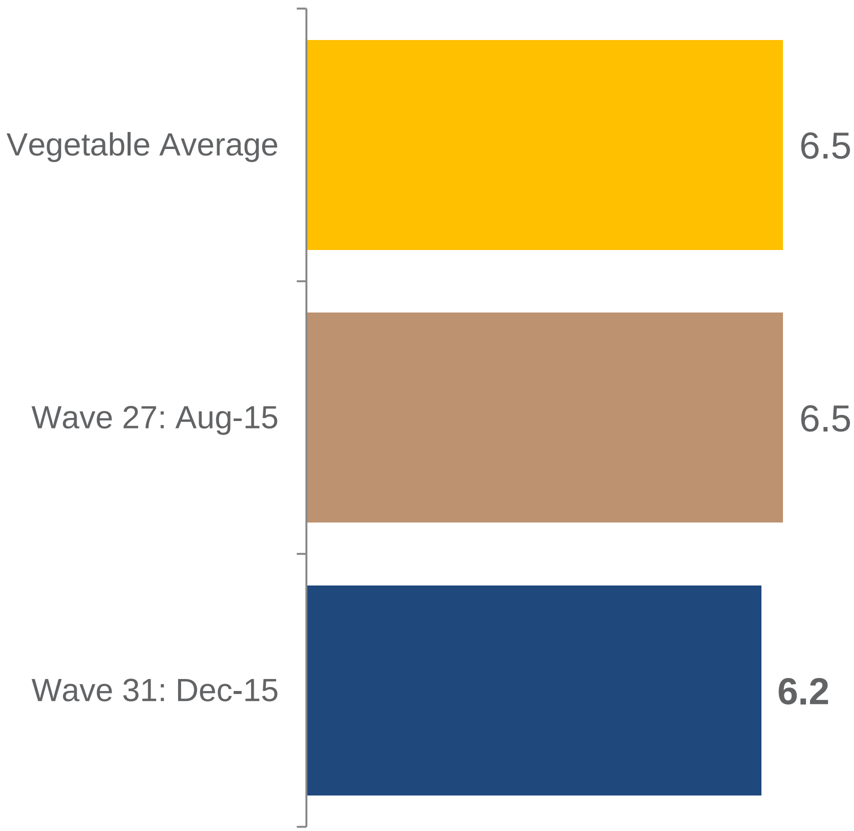
Carrot	49%
Capsicum	45%
Tomato	43%
Lettuce	39%
Potato	35%

Top Cooking Styles

	Wave 27	Wave 31
Stir frying	72%	**69%**
Raw	52%	**54%**
Sautéing	33%	**31%**
Frying	28%	**30%**
Soup	29%	**28%**
Slow Cooking	10%	**10%**
Roasting	3%	**8%**
Mashing	6%	**6%**
Boiling	2%	**5%**
Steaming	6%	**5%**

Q9. How do you typically cook Spring Onion?
Q10a. And when are you serving Spring Onion which of the following do you also serve together with this?
Sample Wave 27 N=203, Wave 31 N=202

The importance of provenance has declined in Wave 31, which now sits below the Vegetable Average. However, knowing that spring onions are grown in Australia is still the most important provenance information for consumers.



7.8

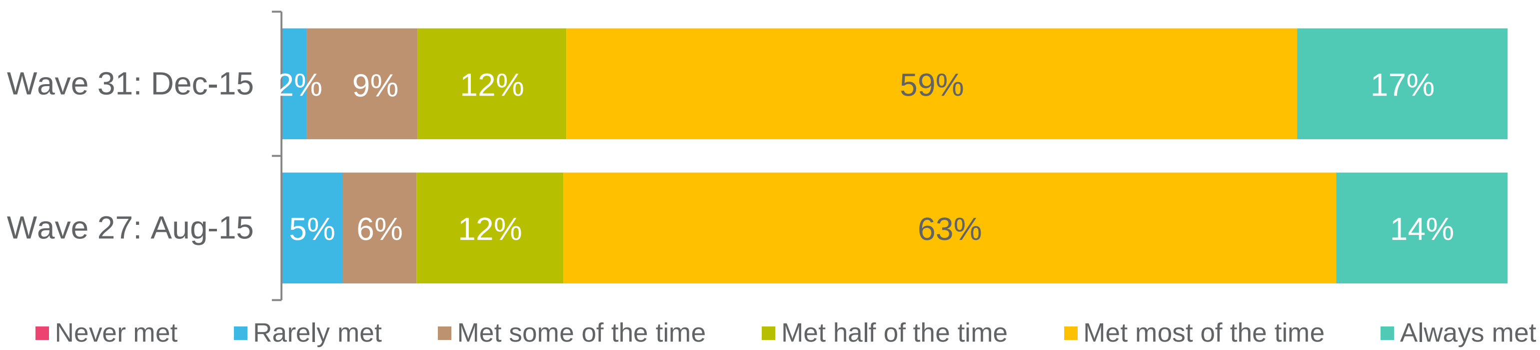
Q14. When purchasing Spring Onion, how important is Provenance to you?
Q15. And when purchasing Spring Onion, how important is that it is grown in Australia?
Sample Wave 27 N=203, Wave 31 N=202

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

Expected to stay fresh for **8.6** days

▲ 9.1 days, Wave 27

Expectations Met



Q12. How long do you expect Spring Onion to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy Spring Onion?
Sample Wave 27 N=203, Wave 31 N=202

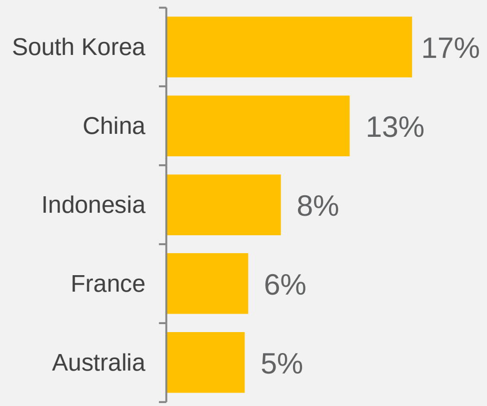
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Spring Onion Product Launch Trends.

Spring Onion Global Launches
October – December 2015

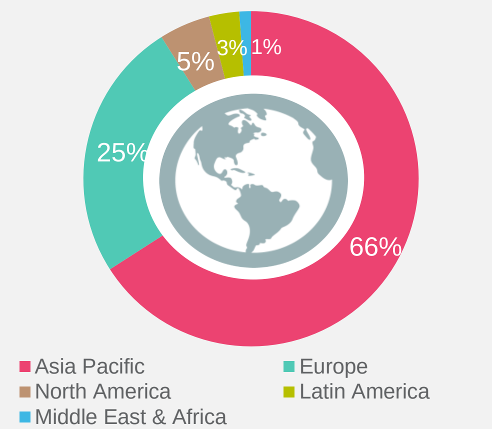
There were 446 spring onion products launched globally over the last three months, substantially lower than the 631 launched in the previous wave. The majority of launches were in South Korea and China. Categories for launches were meals and sauces & seasonings. Key packaging for spring onion products were flexible formats.

Country

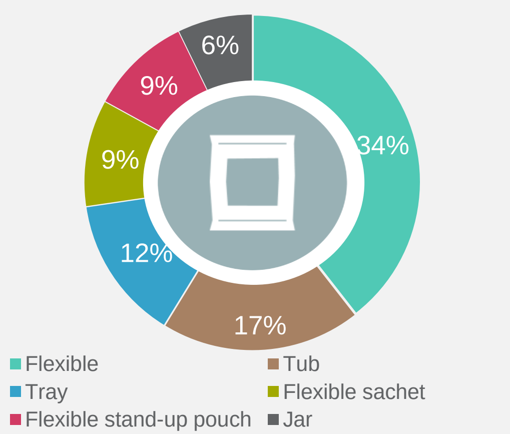


446 Global NPDs

Region



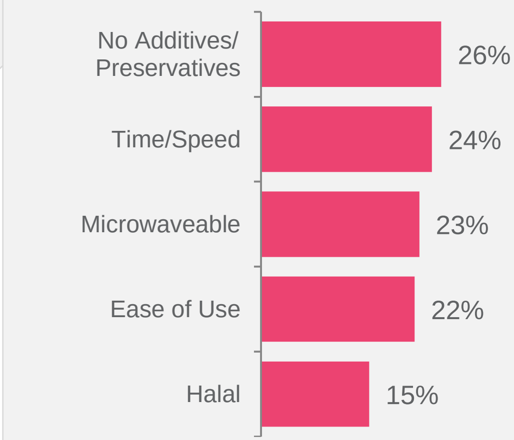
Top Pack Formats



Categories

- Meals 46%
- Sauces & Seasonings 18%
- Snacks 11%
- Processed Products 9%

Top Claims



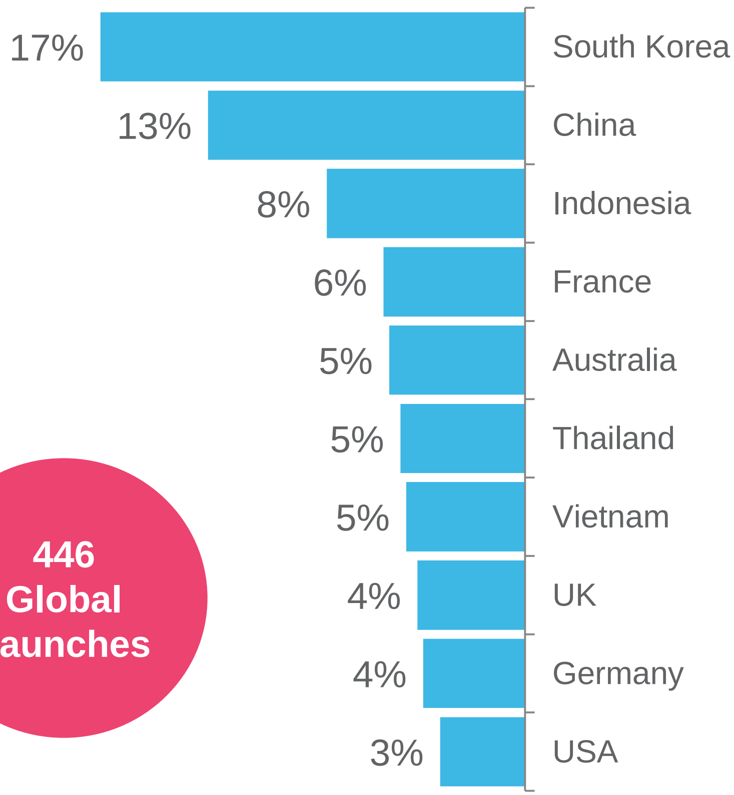
Spring Onion Product Launches:
Last 3 Months (October – December 2015)
Summary

- There were 446 launches in the past 3 months globally that contained spring onions as an ingredient, substantially lower than the previous wave (N=631).
- There were 24 products launched in Australia over the past three months.
- Asia Pacific (66%) and Europe (25%) were the key regions for launches.
- Flexible packaging (34%), and tubs (17%) were the most common formats used for products.
- The main categories for launches were meals (46%), seasonings & sauces (18%), and snacks (11%).
- Claims used on products included no additives/preservatives (26%), time/speed (24%) and microwaveable (23%).
- The most innovative product launched was a Concentrated Yogurt with Shallot Flavour from Iran. Other examples can be found in the following pages.

Source: Mintel (2015)

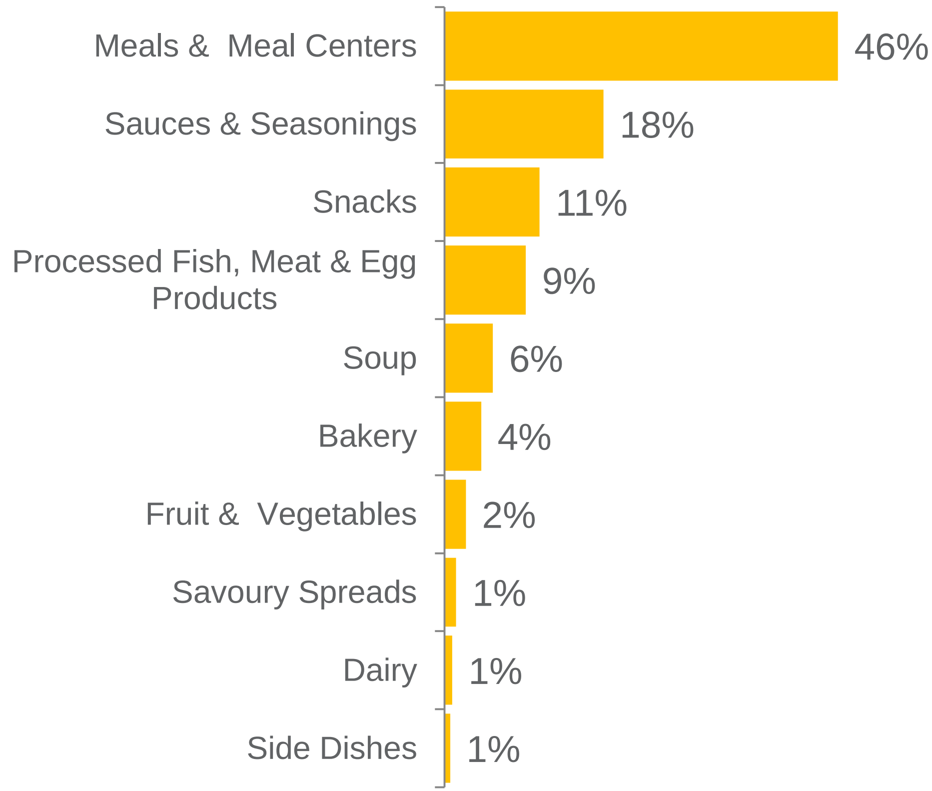
The majority of launches occurred in South Korea and China. The key categories for spring onion launches are meals, sauces & seasonings, snacks, and processed products.

Top Launch Countries



446 Global Launches

Top Launch Categories



The main claims globally were no additives & preservatives, time & speed and microwaveable.

Flexible packaging, tubs and trays are the main packaging formats for spring onion products.

Pack Formats Used

Global	Flexible	34%
Global	Tub	17%
Global	Tray	12%
Asia Pacific	Flexible	41%
Asia Pacific	Tub	14%
Asia Pacific	Flexible stand-up pouch	11%
Europe	Tray	26%
Europe	Flexible	22%
Europe	Tub	21%

Top Claims Used

Global	No Additives/Preservatives	26%
Global	Time/Speed	24%
Global	Microwaveable	21%
Asia Pacific	Time/Speed	27%
Asia Pacific	No Additives/Preservatives	24%
Asia Pacific	Microwaveable	24%
Europe	No Additives/Preservatives	28%
Europe	Ethical - Environmentally Friendly Package	24%
Europe	Microwaveable	21%

Only regions with n >30 are displayed

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

Padratoos Concentrated Yogurt with Shallot Flavour (Iran)

Padratoos Concentrated Yogurt with Shallot Flavor is now available. The product contains 1% salt and 5-7% fat. It retails in a 900g pack.

Claims:
N/A

Terrina Stuffed Beef (Brazil)

Terrina Bife a Rolê (Stuffed Beef) is now available. The microwaveable product is ready-to-eat and retails in a 350g pack.

Claims:
Ease of Use, Microwaveable

Teemful Spring Onion Flavoured Egg Rolls (China)

Teemful Xiang Cong Dan Juan (Spring Onion Flavoured Egg Rolls) have been repackaged. This handmade product is processed according to a traditional technique, and now retails in a newly designed 210g pack containing two individual units.

Claims:
N/A

Ezygo Shrimp Omelette with Rice (Thailand)

Ezygo Khaw Khai Jeiy Kung (Shrimp Omelette with Rice) has been relaunched and was previously known under the 7 Fresh brand. This microwaveable product retails in a 240g pack with a 10g sachet of Heinz Sriracha Chilli Sauce, which is halal certified and free from preservatives and artificial colour.

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

Source: Mintel (2015)

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

Picard So Soupe Sweet Potato, Carrot, Coconut Milk & Ginger Soup (France)

Picard So Soupe Patate Douce, Carotte, Lait de Coco, Gingembre (Sweet Potato, Carrot, Coconut Milk & Ginger Soup) is suitable for vegetarians, contains a note of ginger and coriander, and can be heated in a microwave or bain-marie. This product retails in a partly recyclable 400g pack.

Claims:
Vegetarian, Ethical - Environmentally Friendly Package, Microwaveable

Leader Price Dried Shallot (France)

Leader Price Echalote (Dried Shallot) has been repackaged. This dehydrated product retails in a redesigned 22g pack.

Claims:
N/A

Woolworths Food Our Butcher Spring Onion & Feta Pork Sausages (South Africa)

Woolworths Food Our Butcher Spring Onion & Feta Pork Sausages are described as artisanal sausages made with 100% South African pork that is fresh and coarsely ground. According to the manufacturer, the pork breeds produce the right combination of flavour, texture and percentage of fat. This uncooked product is suitable for home freezing and retails in a 500g pack containing four units.

Claims:
N/A

Quaker Oatmeal Porridge with Anchovy Flavour (Indonesia)

Quaker Bubur Oat Rasa Ikan Bilis (Oatmeal Porridge with Anchovy Flavour) has been repackaged in a newly designed 31g pack. This instant oatmeal porridge is easy to make by mixing with hot water.

Claims:
Ease of Use, Time/Speed

Source: Mintel (2015)

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

Fulong Zhen Xia Ga Spring Onion Flavoured Diced Meat (China)

Fulong Zhen Xia Ga Cong Xiang Rou Li (Spring Onion Flavoured Diced Meat) is made using quality pork shoulder from Jiangxi Province in China and natural spices including star anise, Chinese cinnamon, ginger, clove, amomum tsaoko, fennel, curry and chili. The authentic meat snack is processed according to 16-type handmade techniques and free from starch and artificial colourings.

Claims:
No Additives/Preservatives, On-the-Go

Iceland Oriental Steak with Spring Onions, Garlic and Ginger (UK)

Iceland Oriental Steak with Spring Onions, Garlic and Ginger is now available. This product is made with beef steaks strips in a sweet and spicy oyster sauce with red pepper, bamboo shoots, spring onions and red onions. This microwavable meal features a three out of three spiciness, and retails in a 400g partially recyclable pack.

Claims:
Convenient Packaging, Ethical - Environmentally Friendly Package, Microwaveable

Tops Thai Sweet Fried Dough (Thailand)

Tops Kanom Kan Bua (Thai Sweet Fried Dough) is now available for the Ghost Festival. The seasonal product retails in a 150g pack.

Claims:
Seasonal

Kühne Enjoy Lemon and Shallot Dressing (Netherlands)

Kühne Enjoy Dressing Limoen & Sjalot (Lemon and Shallot Dressing) is now available. The product is lactose and gluten free and suitable for vegans, featuring the V-Label from the European Vegetarian Union. It retails in a 300ml bottle. This product was on display at the Anuga 2015 Trade Show in Cologne, Germany.

Claims:
Low/No/Reduced Lactose, Low/No/Reduced Allergen, Vegan, Gluten-Free, No Animal Ingredients, Vegetarian

Source: Mintel (2015)

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

Chinese Quick as Wok! Chicken Chow Mein

Chinese Quick as Wok! Chicken Chow Mein is described as fast and authentic. The microwavable product retails in a 400g pack.

Claims:
Time/Speed, Microwaveable

Mushiki Free Range Pork & Shallot Gyoza

Mushiki Free Range Pork & Shallot Gyoza is ready to enjoy in eight minutes and contains no added MSG, colours or flavours. It is described as a classic Japanese dumpling, made with delicious succulent locally sourced free range pork and shallot, wrapped in gyoza pastry ready to be simply steamed or lightly pan fried. The product retails in a 275g pack containing twelve chef quality gyoza.

Claims:
Ease of Use, No Additives/Preservatives, Ethical - Animal

Hansells Green Curry Soup with Konjac Noodles

Hansells Green Curry Soup with Konjac Noodles contains Thai spices, lemongrass and galangal infused in a rich creamy coconut base mixed with low calorie konjac noodles, potato, bamboo shoot and peas. The 100% natural ready to serve soup is free from preservatives, dairy and gluten, and made from the finest natural ingredients.

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

Source: Mintel (2015)

Radish.

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

Radish is generally purchased from mainstream retailers such as Woolworths and Coles. Specialist vegetable retailers are also a popular purchase channel.

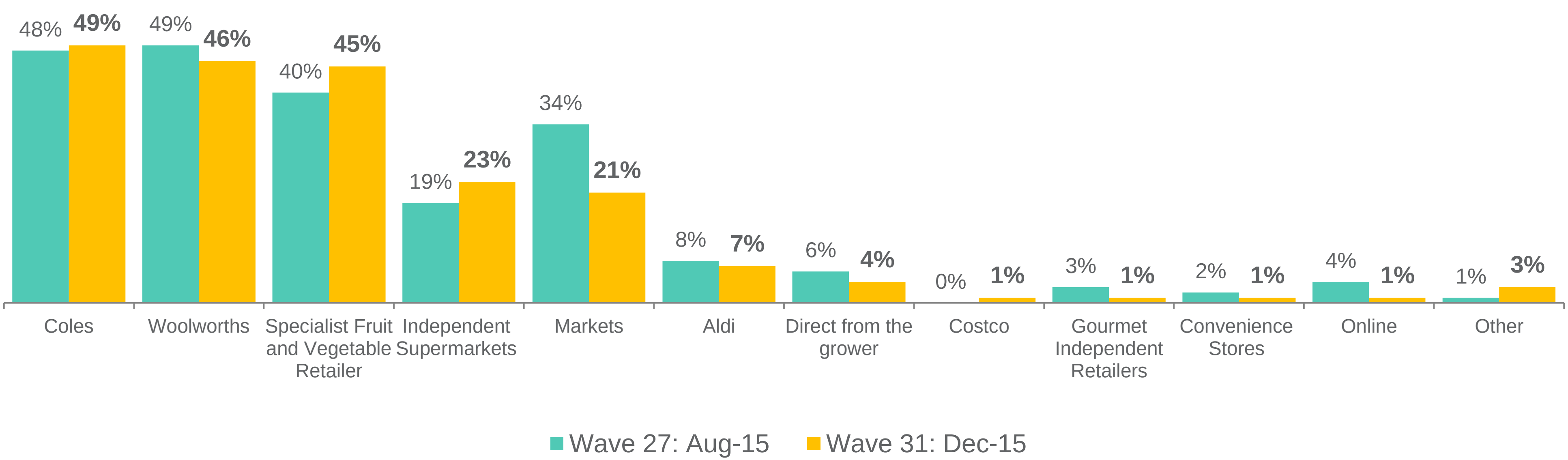
Average Purchase **3.2** times per month

▼ 3.9 times, Wave 27

Average Consumption **9.4** times per month

▼ 9.2 times, Wave 27

Purchase Channels



Q1. On average, how often do you purchase Radish?
Q2. On average, how often do you consume Radish?
Q5. From which of the following channels do you typically purchase Radish?
Sample Wave 27 N=203, Wave 31 N=202

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 **500g** of radish, marginally lower than the previous wave.

▲ 600g, Wave 27

Recalled last spend

Recalled last spend on radish was **$3.00**, which has declined since the previous wave.

▲ $3.40, Wave 27

Value for money

Consumers' perceived value for money is fair for radish **(6.3/10)**, consistent with the past wave.

— 6.3/10, Wave 27

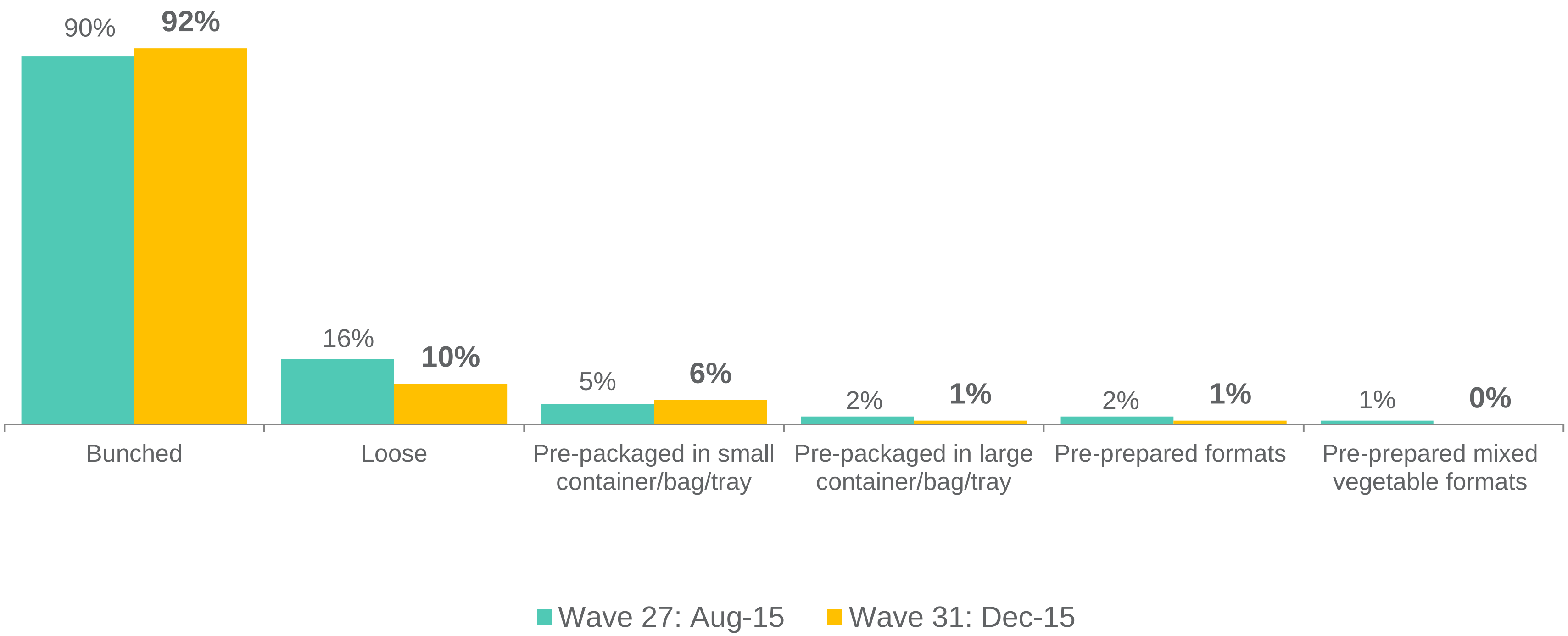
Q3. How much Radish do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 27 N=203, Wave 31 N=202

Horticulture Innovation Australia

colmar brunton.

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

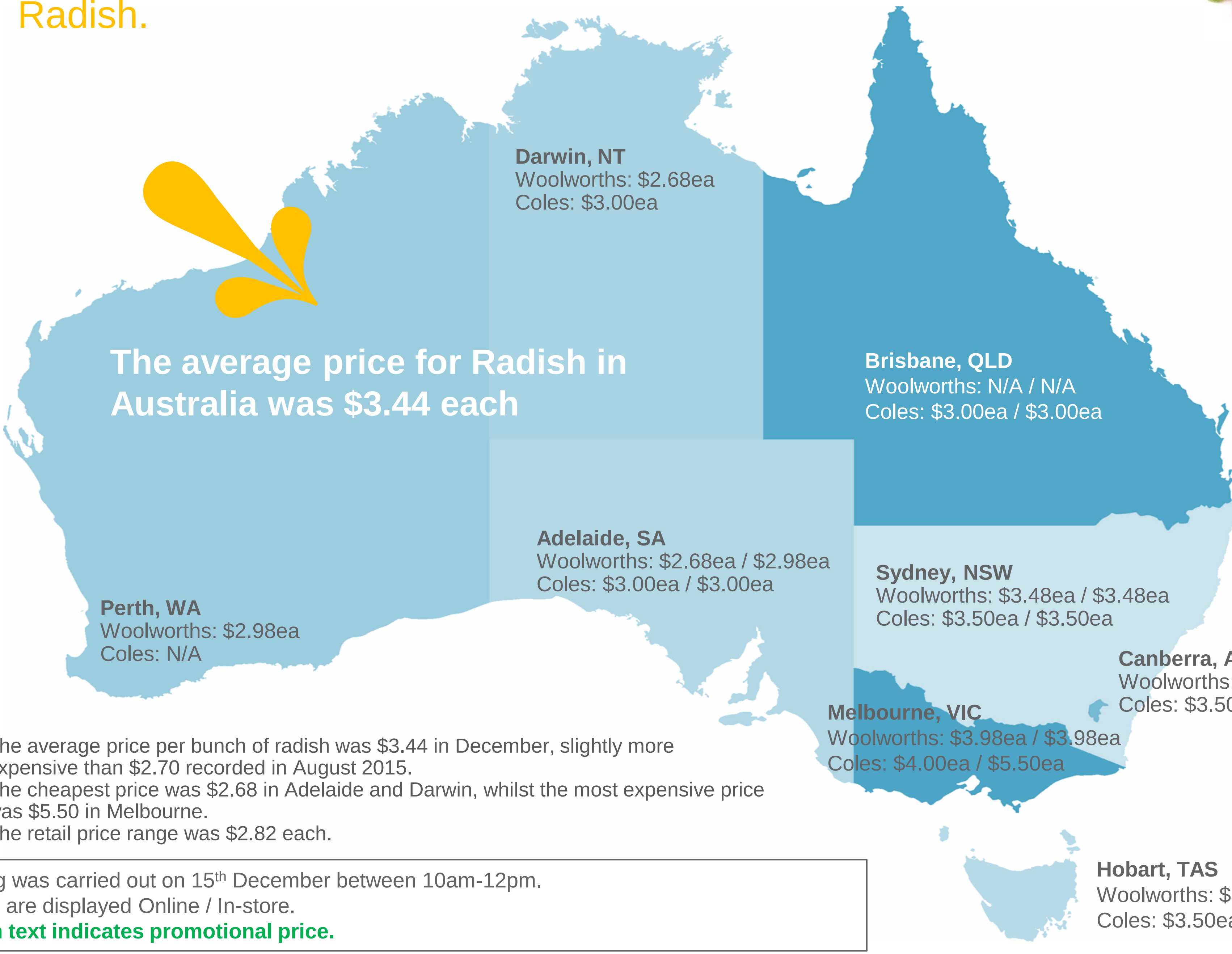
Bunched radishes are the most common purchase format. This may be due to the lack of other format options available.



Q4b In what fresh formats do you typically purchase Radish?
Sample Wave 27 N=203, Wave 31 N=202

Online and In-store Commodity Prices.

Radish.

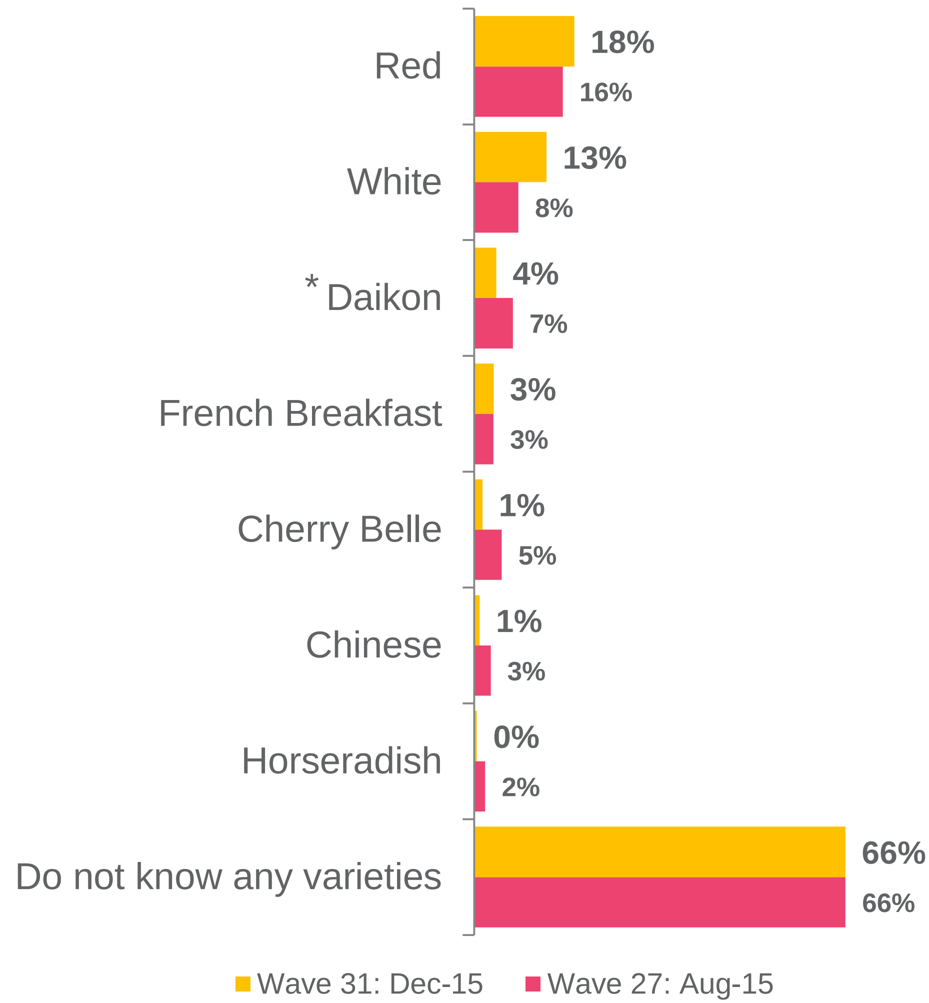


- The average price per bunch of radish was $3.44 in December, slightly more expensive than $2.70 recorded in August 2015.
- The cheapest price was $2.68 in Adelaide and Darwin, whilst the most expensive price was $5.50 in Melbourne.
- The retail price range was $2.82 each.

Pricing was carried out on 15th December between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates promotional price.

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

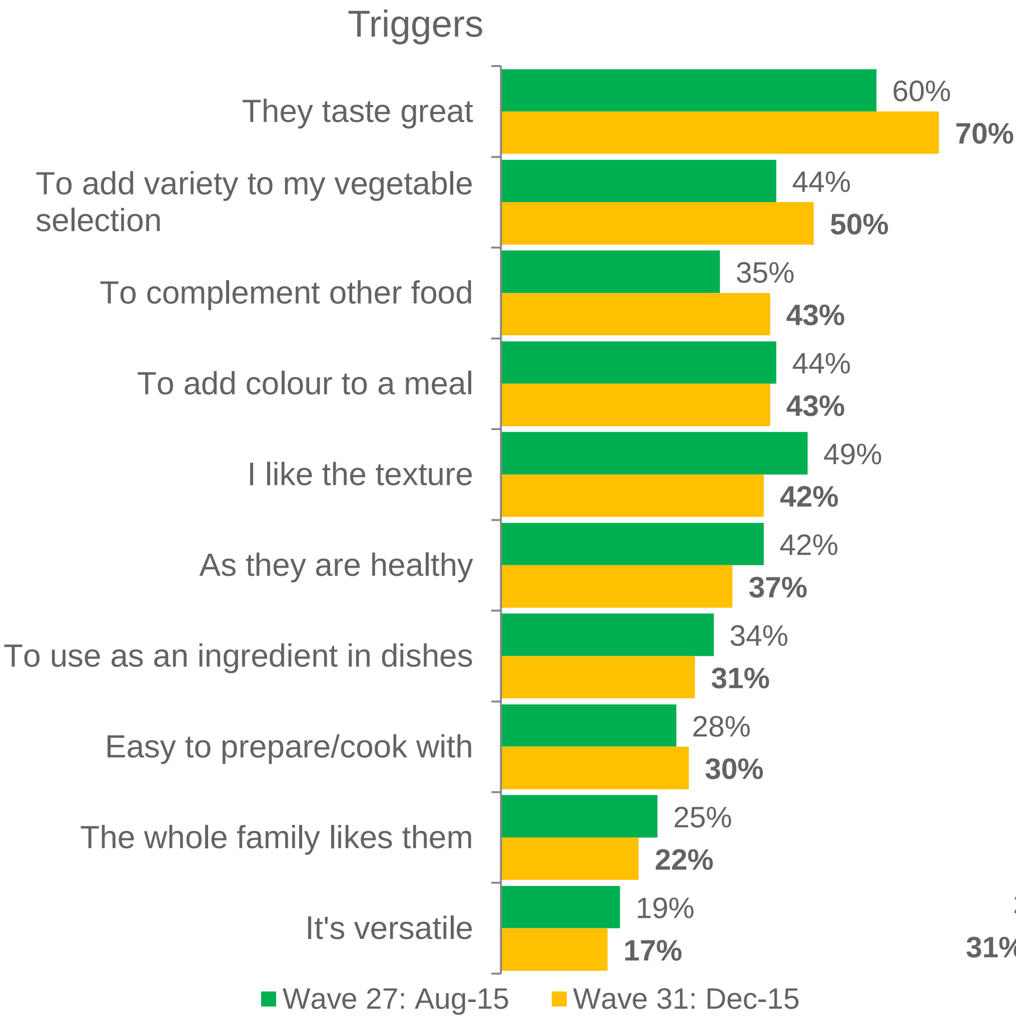
Consumers are generally prompted by colour and location for radish varieties.

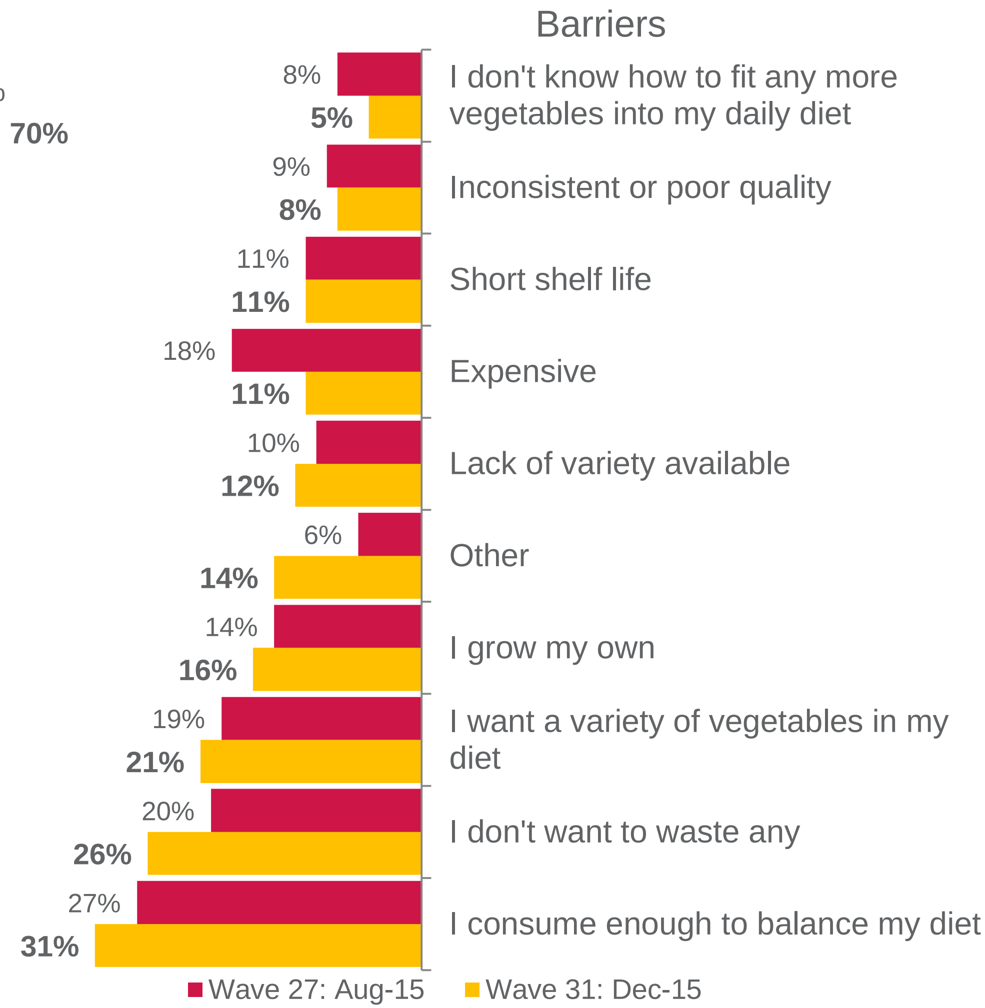


Q6a. What varieties of Radish are you aware of? (unprompted)
*Daikon is a type of Asian Vegetable, but has also been recalled by consumers as a type of radish
Sample Wave 27 N=203, Wave 31 N=202

Horticulture Innovation Australia
colmar brunton.

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





Q7. Which of the following reasons best describes why you purchase Radish?
Q8. Which reason best describes why you don't buy Radish more often?
Sample Wave 27 N=203, Wave 31 N=202

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

Meal occasions tend to occur during lunch and dinner.

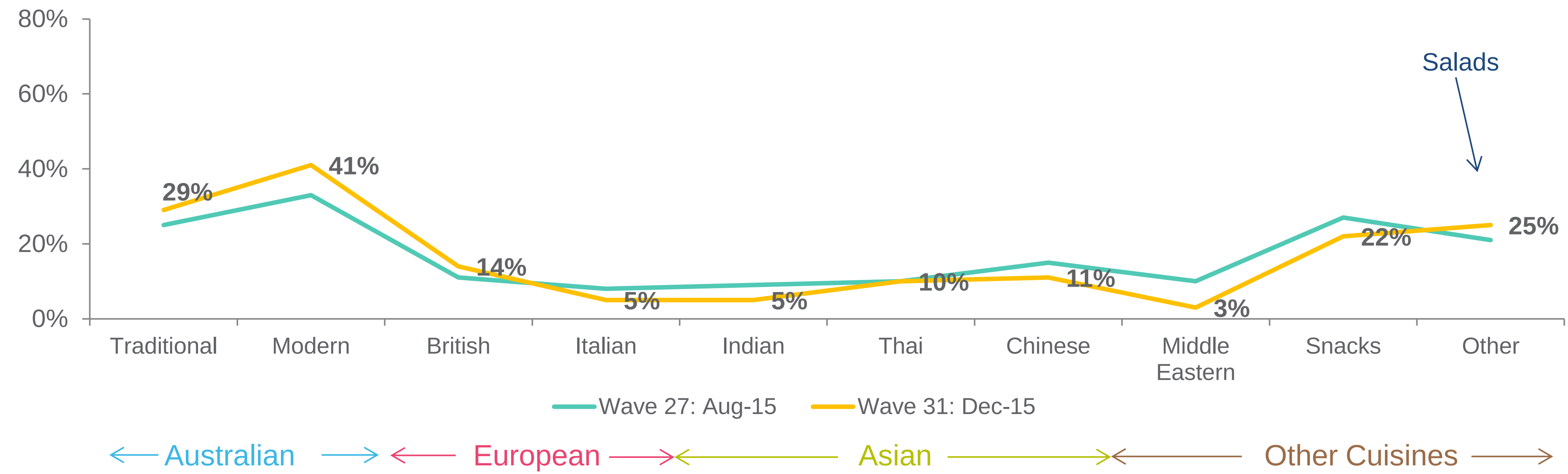
Top 5 Consumption Occasions

	Wave 27	Wave 31
Lunch	54%	**50%**
Dinner	58%	**50%**
Family Meals	39%	**39%**
Quick Meals	36%	**33%**
Weekday Meals	29%	**33%**

8% used radish when cooking a new recipe

▼ 10%, Wave 27

Typical Cuisine Cooked



Q10. What cuisines do you cook/consume that use Radish?
Q11. Which of the following occasions do you typically consume/use Radish?
Sample Wave 27 N=203, Wave 31 N=202

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

Consumers prefer to serve radish with tomatoes and lettuce, consistent with the previous wave. Radish is usually consumed raw, but also used in stir fries and soups.

Accompanying Vegetables

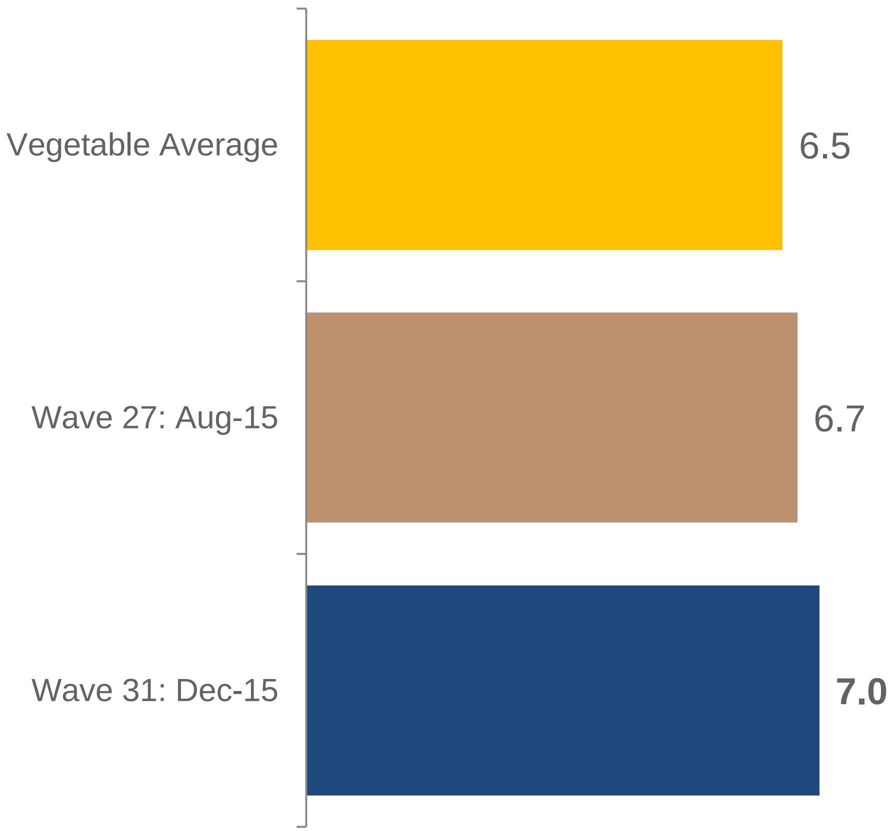
Tomato	75% ▲
Lettuce	67% ▲
Capsicum	57% ▲
Cucumber	52% ▲
Celery	44% ▲

Top Cooking Styles

	Wave 27	Wave 31
Raw	80%	**80%**
Stir frying	20%	**13%**
Other	11%	**12%**
Soup	13%	**8%**
Sautéing	3%	**6%**
Roasting	5%	**4%**
Steaming	5%	**4%**
Mashing	3%	**3%**
Baking	2%	**3%**
Microwave	3%	**2%**

Q9. How do you typically cook Radish?
Q10a. And when are you serving Radish which of the following do you also serve together with this?
Sample Wave 27 N=203, Wave 31 N=202

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



8.6

Q14. When purchasing Radish, how important is Provenance to you?
Q15. And when purchasing Radish, how important is that it is grown in Australia?
Sample Wave 27 N=203, Wave 31 N=202

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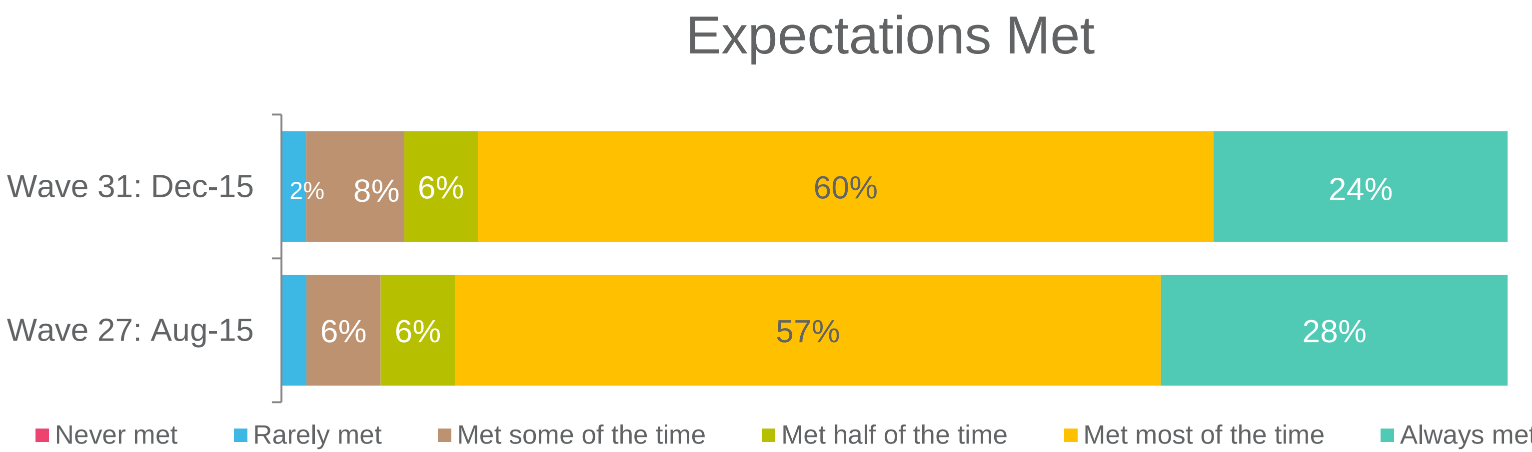
Consumers expect radishes to remain fresh for approximately eight days once purchased, which is being met most of the time.

Expected to stay fresh for **8.4** days

▼ 7.9 days, Wave 27



Q12. How long do you expect Radish to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy Radish?
Sample Wave 27 N=203, Wave 31 N=202

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

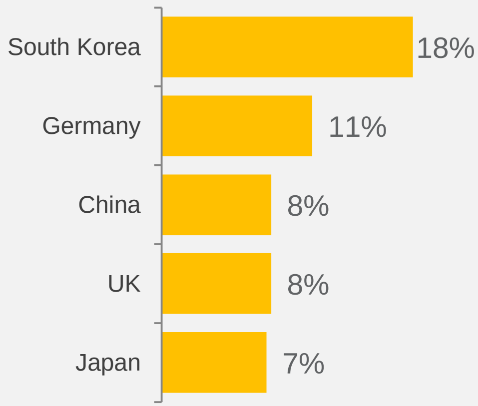
Radish Product Launch Trends.

Radish Global Launches

October – December 2015

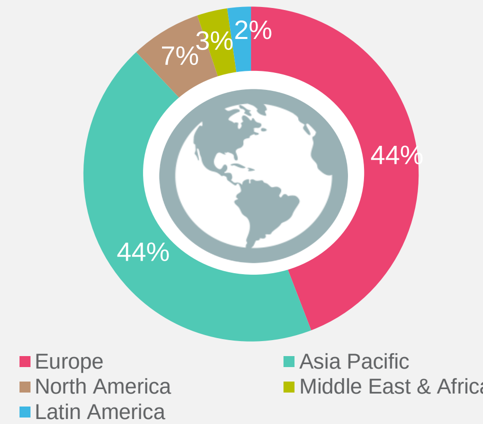
There were 308 radish products launched globally over the last three months. The majority of launches were in South Korea and Germany. Categories for launches were sugar & gum confectionery, and meals. Key packaging for radish products were flexible formats.

Country

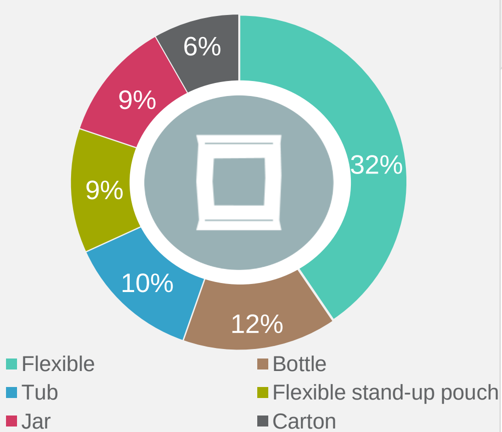


308 Global NPDs

Region



Top Pack Formats



Categories

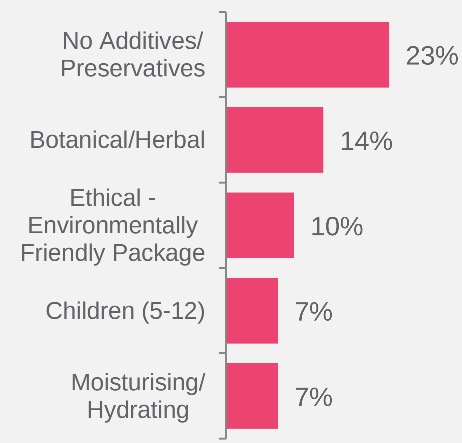
Sugar & Gum 19%

Meals 13%

Sauces & Seasonings 13%

Skincare 9%

Top Claims



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

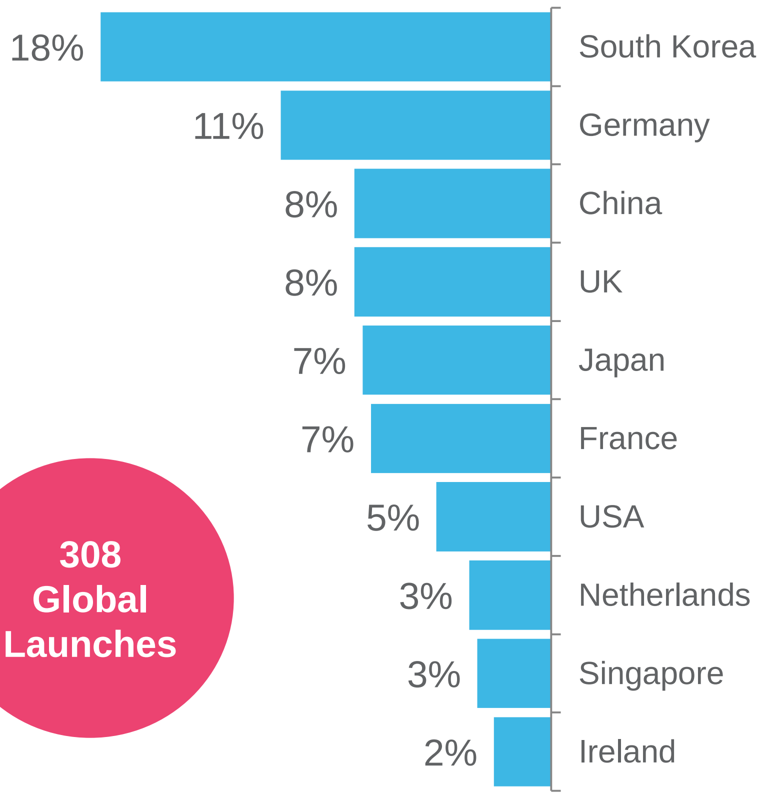
- There were 308 launches in the past 3 months globally that contained radish as an ingredient.
- There were 2 products launched in Australia over the past three months.
- Europe (44%) and Asia Pacific (44%) were the key regions for launches.
- Flexible packaging (32%), bottles (12%) and tubs (10%) were the most common format used for products.
- The main categories for launches were sugar and gum confectionery (19%), meals (13%) and sauces & seasonings (12%).
- Claims used on products were no additives/preservatives (23%), botanical/herbal (14%), and environmentally friendly packaging (10%).
- The most innovative product launched was a Vegetable Water from Germany. Examples of other innovative launches can be found in the following pages.

Source: Mintel (2015)

The majority of launches occurred in South Korea, Germany and China.

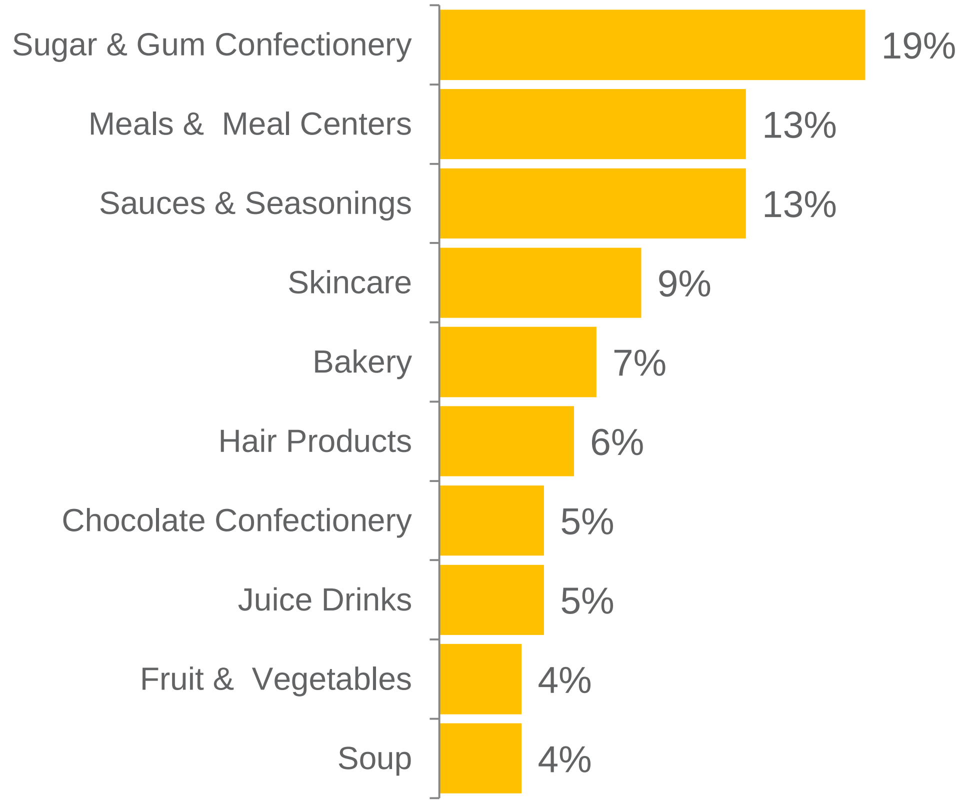
The key categories for radish launches are sugar & gum confectionery, meals, and sauces & seasonings.

Top Launch Countries



308 Global Launches

Top Launch Categories



The main claims globally were no additives & preservatives, and botanical/herbal. Flexible pack formats were popularly used in all regions.

Pack Formats Used

Global	Flexible	32%
Global	Bottle	12%
Global	Tub	10%
Europe	Flexible	36%
Europe	Bottle	14%
Europe	Tub	12%
Asia Pacific	Flexible	29%
Asia Pacific	Flexible stand-up pouch	15%
Asia Pacific	Jar	10%

Top Claims Used

Global	No Additives/Preservatives	23%
Global	Botanical/Herbal	10%
Global	Ethical - Environmentally Friendly Package	6%
Europe	No Additives/Preservatives	21%
Europe	Children (5-12)	13%
Europe	Ethical - Environmentally Friendly Package	13%
Asia Pacific	No Additives/Preservatives	24%
Asia Pacific	Microwaveable	13%
Asia Pacific	Ease of Use	12%

Only regions with n >30 are displayed

Innovative Radish Launches:
L3M (October – December 2015)

Zàini Chocolate Lentils with Frozen Surprise (Hong Kong)

Zàini Chocolate Lentils with Frozen Surprise are now available. This children's product retails in a 26g pack containing 2 x 13g eggs, each featuring character toys from Disney's Frozen film.
.

Claims:
Children (5-12)

Pokka Mixed Berries and Carrot Juice Drink (Singapore)

Pokka Mixed Berries and Carrot Juice Drink contains delicious wonders of berries harmoniously blended with purple carrot. This fresh product is made from 100% juice and contains beta carotene and antioxidants like vitamin C and vitamin E. The halal certified juice is free from preservatives, and 250ml of this product provides one serving of the recommended daily amount. It retails in a 500ml bottle.

Claims:
Halal, No Additives/Preservatives, Antioxidant

HanbitFood Organic Vegetable Soup (Germany)

HanbitFood Organic Vegetable Soup is now available. It retails in a 150ml pack. This HACCP certified product was on display at the Anuga 2015 Trade Show in Cologne, Germany.

Claims:
Organic

HanbitFood Vegetable Water (Germany)

HanbitFood Vegetable Water comprises water with shiitake mushroom, carrot, radish, burdock, lemon and tangerine. It retails in a 120ml pack. This HACCP certified product was on display at the Anuga 2015 Trade Show in Cologne, Germany.

Claims:
N/A

Source: Mintel (2015)

Innovative Radish Launches:
L3M (October – December 2015)

Wo Xi Fan Chilli and Radish Cube in Camellia Oil (China)

Wo Xi Fan Cha You La Jiao Luo Bo Ding (Chilli and Radish Cube in Camellia Oil) is a pickled condiment for serving with rice. This product retails in a 268g pack.

Claims:
N/A

Koikeya Suppamucho Premium Plum Flavour Potato Chips (Italy)

Koikeya Suppamucho Premium Plum Flavour Potato Chips are now available in CVS stores and feature a newly updated packaging design. The product is described as a hard potato snack seasoned with Maboroshi No Ume (miracle plum) from Wakayama, and made with GMO-free potatoes. It retails in a 65g pack. Launched on September 21, 2015, open-priced.

Claims:
Premium, GMO-Free

Fitizen Multiple Enzymes Tablets (Taiwan)

Fitizen Multiples Enzymes Tablets are made using first concept of yeast, 80 enzymes, and lactobacterias. They are claimed to help promote bowel movement and keep healthy digestion system. This product retails in a 19.8g pack containing 33 x 600mg tablets. According to the on-pack instruction, this product is recommended to take one to two tablets each day.

Claims:
Botanical/Herbal, Digestive (Functional)

Fromwell Stir-Fried Red Chilli Paste with Dried Radish (South Korea)

Fromwell Stir-Fried Red Chilli Paste with Dried Radish is now available. This product retails in a 120g pack.

Claims:
N/A

Source: Mintel (2015)

Innovative Radish Launches:
L3M (October – December 2015)

Asda Chosen by You Carbonated Lychee Juice Drink (UK)

Asda Chosen by You Carbonated Lychee Juice Drink is described as refreshingly sweet. This product is suitable for vegetarians, and is free from artificial colours and flavours. It retails in a 6 x 330ml partly recyclable pack.

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

Eva's Radish Salad (Germany)

Eva's Radieschensalat (Radish Salad) is suitable for vegans and is gluten free. This product retails in a 130g tub.

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

Emart Seasoned Burdock & Pickled Radish (South Korea)

Emart Seasoned Burdock & Pickled Radish is now available. This product is ideal for rice sushi roll and retails in a 220g pack.

Claims:
N/A

Dusk Foods Hai Dia Xiao Mei Mei Salt Flavoured Dried Radish Cookies (China)

Dusk Foods Hai Dia Xiao Mei Mei Yan Su Wei Cai Pu Bing Gan (Salt Flavoured Dried Radish Cookies) are made using fresh ingredients and secret spices. The cookies are said to be aromatic, crispy and delicious, and retails in a 50g pack.

Claims:
N/A

Source: Mintel (2015)

Australian Radish Launches:
L3M (October – December 2015)

Mr. Kipling Festive Bakewells

Mr. Kipling Festive Bakewells have been repackaged in a newly designed festive green and white decorative 240g pack containing six units. The cakes comprise a light pastry case filled with plum and raspberry jam, moist almond sponge and soft icing, topped with festive sprinkles. The vegetarian product has been launched for the Christmas season, and is free from artificial colours, and hydrogenated fat.

Claims:
No Additives/Preservatives, Low/No/Reduced Transfat, Vegetarian, Seasonal

Pandaroo Japanese Instant Miso Soup with Kimchi

Pandaroo Japanese Instant Miso Soup with Kimchi is made with real vegetables, using the most advanced freeze-dried technology, with real visible ingredients for convenience, is ready in two minutes, and contains no cholesterol, artificial colours or preservatives. The product retails in a pack containing two 6g sachets that make two servings.

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

In the Media.

General Vegetable News
(October – December 2015)

- The future of the agricultural industry may be under threat due to the shortage of European backpackers visiting Australia.
- Figures from the Australian Department of Immigration show a dramatic fall in the number of foreign backpackers in the country; with 34,000 fewer Working Holiday Visas being granted in 2014-15 than 2012-13.
- AUSVEG believes that a weakening Australian dollar as well as a poor reputation for treatment of foreign workers is to blame.

Source: www.abc.net.au

Commodity News
(October – December 2015)

- Since September, LaGrasso Bros. Inc. Produce, a Detroit-based produce distributor, has been growing and selling lettuce from an upcycled freight container. This technology has been developed from Boston-based sustainable food company Freight Farms.
- The hallmark product is the Leafy Green Machine – a hydroponic farming system self-contained in a shipping container. It can grow cabbage, lettuce and herbs year round, and Freight Farms estimates 500 full heads of lettuce can be harvested weekly from a single unit.

http://www.crainsdetroit.com

- Fresh produce provider Dole Food Co. hopes to boost Americans' fruit and veggie intake by expanding its "Get Up and Grow" healthy eating initiative and launched a "less stringy" celery.
- The company places "a great deal of care into our growing practices to eliminate stringiness. By using high-quality soil and proper irrigation and fertilisation, we can decrease stress on the growing plant and minimise stringiness."
- Dole calls out many of these attributes in new packaging, which also includes recipes to boost consumption of the veggie.

http://www.foodnavigator-usa.com

- The seedless salad cucumber hybrid developed by Kerala Agricultural University (KAU) has provided attractive revenue for farmers with its better yield and relatively lighter seed cost.
- The hybrid cucumber can be stored up to one week at room temperature.

http://www.thehindu.com

- Nutritionist Catherine Saxelby says "zoodles" – zucchini noodles made from spirals of raw zucchini – are "the best thing to come out of the raw food movement".
- Zucchini is low in kilojoules and contains vitamin C and potassium. The noodles can be eaten raw as the base of a salad, or very lightly sautéed and used in place of pasta.

http://www.stuff.co.nz

Commodity News
(October – December 2015)

- Scientists have created a super strain of plant that produces both eggplants and potatoes in the same pot. Botanists hope that the new plant will interest those who have limited space to grow plants.
- The plant usually produces about four, big, purple eggplants on the stem, and about 2 kilograms of potatoes beneath the soil.
- Marketed as the "Egg and Chips" plant, the plant is being sold by the British seed company Thomas & Morgan.

http://www.scienceworldreport.com

- There was no relevant spring onion news released in the last three months.

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

Background & Methodology.

Background & Setting the Scene.

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

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

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

This wave's report (Wave 31, December 2015) focuses on:

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

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

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

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Online Methodology.

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

General Respondent Questions

Demographics

Vegetable Consumption

1/7 Commodities

Commodity Specific Questions

Category Health

Purchase & Consumption Habits

Price Perceptions & Average Spend

Triggers/Barriers to Purchase

Preparation Preferences

+ 2 Ad hoc Questions per Month

Sample.

Respondents represented most states and territories, as well as both metro and rural areas.

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

To qualify for the questionnaire, respondents...

- Were aged 18 years and over
- Purchased fresh vegetables at least once a month
- Purchased at least one of the monthly commodities (cabbage, celery, cucumber, zucchini, eggplant, spring onion and radish) within the last month
- Were the main or joint grocery buyer.

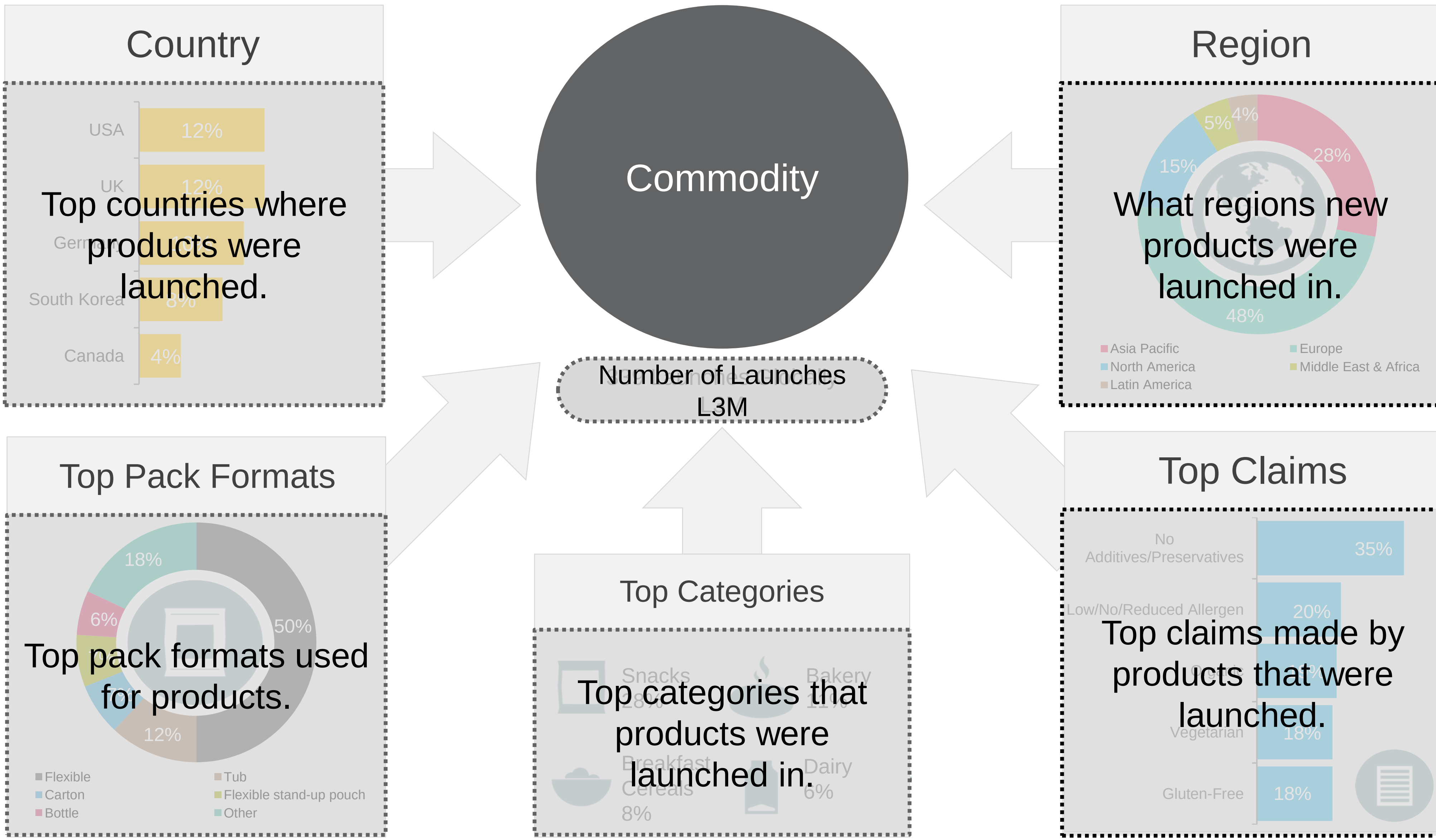
	Cabbage n=306	Celery n=307	Cucumber n=306	Zucchini n=304	Eggplant n=202	Spring Onion n=202	Radish n=202
Gender							
Male	36%	35%	32%	35%	45%	36%	50%
Female	64%	65%	68%	65%	55%	64%	50%
Age							
18-24 y.o.	8%	10%	7%	9%	5%	3%	2%
25-34 y.o.	17%	13%	20%	20%	15%	10%	5%
35-44 y.o.	14%	16%	14%	16%	17%	17%	8%
45-54 y.o.	19%	19%	22%	20%	18%	21%	16%
55-64 y.o.	22%	19%	21%	18%	28%	31%	32%
65+ y.o.	20%	24%	17%	17%	16%	18%	37%
Household							
Single Income no Kids	18%	20%	22%	20%	17%	17%	14%
Double Income no Kids	20%	18%	23%	22%	17%	16%	17%
Young Families	17%	13%	15%	17%	15%	15%	4%
Established Families	22%	25%	22%	23%	21%	23%	20%
Empty Nesters	23%	24%	19%	18%	30%	28%	45%
Location							
New South Wales	18%	23%	22%	19%	20%	15%	17%
Victoria	17%	17%	16%	20%	19%	17%	15%
South Australia	18%	17%	18%	16%	14%	20%	22%
Queensland	20%	18%	18%	21%	14%	19%	17%
Western Australia	17%	15%	16%	13%	23%	15%	18%
Tasmania	5%	4%	3%	3%	4%	9%	7%
Australian Capital Territory	5%	6%	6%	6%	3%	4%	2%
Northern Territory	1%	1%	1%	1%	1%	0%	1%

Trends Research: Our Approach

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

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

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



Thanks.