Project Harvest Monthly Tracker Report.

Wave 32, January 2016

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

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

Horticulture Innovation Australia

colmar brunton.

Contents.

Wave 32:
Executive Summary

Industry Insight.

2016 is well underway and the year's predicted consumer trends have started to emerge. So, what are we seeing, and what specific food trends do growers have to look forward to over the coming months?

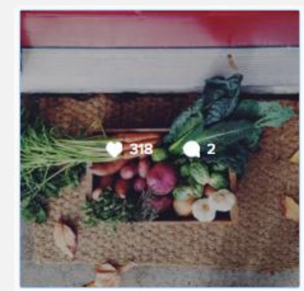
While 2015 was the year of Nutella and American-style burgers, 2016 could see consumers shed a few kilos with an increased focus on personalised health solutions with a dash of social and environmental responsibility. Here are a few emerging trends that consumers are getting excited about…

Superfoods
Although not a new trend, superfoods are ramping up. They are featuring in more packaged products for more consumption occasions, and continuing to justify a price premium.
E.g. Blackmores Vitality Super Greens Powder Blend

Industry Insight continued.

Bowl Food
Smoothie bowls, juice bowls, cold soup bowls…. A huge hit on Instagram as they are so visually appealing! Bowl based meals are also becoming trendy because you can create so many combinations and because they can be more satisfying than a smoothie or a juice as they take longer to consume. ***E.g. Avocado & Kale Smoothie Bowl***

Instagram
With Instagram continuing to grow and capture consumers' love affair with what is in their glass or on their plate, the vibrancy of fresh vegetables can make them the star, along with fruit, flowers, herbs and spices. ***#vegetables***



Charcoal
Smoked and charred food and drinks are in! The smokiness adds a new sensory dimension and the char additional visual appeal to products otherwise considered plain. ***E.g. Sydney's Black Widow Burger made with vegetable carbon***

Industry Insight continued.

Less waste
A movement of efficient consumption, particularly evident among Millennials, is showing up in all industries including transport (Uber), accommodation (airbnb) and even pet ownership (Dog Match). In the food industry, many are now following a "nose to tail" philosophy in relation to meat and "stem to root" philosophy in relation to their veg. ***E.g. The Odd Bunch, Woolworths***

Continuation of provenance, seasonality and knowledge
As consumers move away from overly processed and overly sweetened foods, they are searching for this knowledge, which they can easily incorporate into their busy day-to-day routines. Knowing where food is from and knowing whether it is in season continue to be key indicators of "naturalness" and freshness for consumers.

Natural and Organic
With rising meat prices and associated health concerns, some experts are going as far as saying that vegetables are expected to push animal protein to the side of the plate. Consumers are learning more and more about organic processes and the vegetables which really benefit from the practice.

Industry Insight continued.

Raw
For those seeking natural foods in their most natural state, the raw food movement is for them! Apart from the health connotations, raw food also offers up different flavour and texture sensations, providing the variety many crave. ***E.g. Botanical cuisine raw sauces***

Fermentation
Around since the beginning of civilisation, this trend really took off in 2015 and will continue into 2016. Fermented products, such as pickled vegetables, creates new flavour dimension to foods *and* are said to help anything from bloating to anxiety! ***E.g. Obap Kimchi paste***

The Market Place
From farmers markets and hawkers markets to the feeling of a new fresh food section in a major retailer, immersing themselves in the hustle and bustle of a market brings consumers one step closer to desired freshness, naturalness and provenance.

BOOTS FOR CHANGE support farming families

Asian Vegetables Grower Action Plan.

Wave 32 Fast Facts – Asian Vegetables

- Asian vegetables have positive consumer sentiment and propensity to purchase, consistent with previous waves.
- Asian vegetables are purchased 4 times per month and are consumed 8 times per month, slightly lower than previous waves.
- Consumers purchase 0.9kg of Asian vegetables per shop. Recalled last spend is $5.10. Overall, consumers perceive Asian vegetables to be good value for money.
- National price tracking indicated the average price for Buk Choy in September was $2.36, which is relatively consistent between states and retailers.
- Just under one quarter of consumers are unable to recall a type of Asian vegetable. Buk Choy remained the most recalled type of Asian vegetable, followed by Choy Sum and Pak Choy.
- Asian vegetables are expected to stay fresh for nearly 6 days, and freshness expectations are met most of the time. Asian vegetables appear to be largely unaffected by seasonal changes.
- Taste and to use as an ingredient in dishes are the main influences on purchase of Asian vegetables. Short shelf life and wanting a variety of vegetables are the primary barriers to purchase.

84% of consumers stir fry their Asian vegetables.

1.

Insight:

Short shelf life remains the key barrier to purchase. Additionally, expense is an increasing barrier to purchase.

Short Term Recommendation:

Provide consumers with storage instructions at point of sale and on-pack. Increasing longevity of freshness will positively effect satisfaction and reduce perceptions of expense.

2.

Insight:

There is a lack of New Product Development (NPD) globally. Consumers are increasingly steaming and sautéing Asian vegetables.

Long Term Recommendation:

There is an opportunity to provide consumers with ready-to-cook steamed Asian vegetable packs. To highlight the versatility of Asian vegetables, provide steam packs with various sauce options including oyster sauce, and soy sauce and sesame oil.

Capsicum Grower Action Plan.

Wave 32 Fast Facts – Capsicum

- Consistent with previous waves, capsicums have strong category health figures for importance, satisfaction, endorsement and interest in new varieties.
- Purchase and consumption frequency of capsicum continued to increase this wave. Capsicum is consumed on average 10 times per month and is purchased mainly from mainstream and specialist retailers.
- Consumers are purchasing 660g of capsicums on average. Recalled last spend is $4.20, which is perceived to be fair value for money.
- Price tracking for January 2016 showed the national average as $6.11 per kg for green capsicums.
- Nearly one half of consumers were unable to recall a type of capsicum. Colour was the main trigger to recall.
- Taste and to use as an ingredient were the key influences to purchase. Barriers to purchase include not wanting to waste any and expense.
- Consumers expect capsicums to remain fresh for 8 days once purchased. These expectations are in line with previous waves and are generally met.

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

1. Insight:

Consumers love experimenting with capsicum with a quarter of consumers using them in new recipes. Popularity for Thai cuisine has increased this wave.

Short Term Recommendation:

Provide consumers with inspiration in the supermarket with recipe cards ideas including Thai stuffed capsicums, Thai red curry and chicken & capsicum stir-fry.

2. Insight:

With the 'wellness' movement and the shift towards the local markets, health has become more top of mind to consumers and an increasing trigger to purchase capsicum.

Long Term Recommendation:

Farmers should Investigate alternative channels to sell capsicums and fresh produce outside of the key retailers. This includes farmers markets, central and public markets e.g. Queen Victoria Market.

Brussels Sprouts Grower Action Plan.

Wave 32 Fast Facts – Brussels Sprouts

- Brussels Sprouts had relatively strong category health figures, with the vegetable holding high level of importance to consumers.
- Brussels Sprouts were purchased around three times per month and were consumed six times per month, relatively consistent with the previous wave.
- Overall, Brussels Sprouts were perceived to be good value for money. Consumers on average purchase 700g of Brussels Sprouts, typically in the format of individual sprouts. Recalled last spend was $4.10.
- Price tracking for January 2016 revealed the average price was $10.93 per kg.
- Over three quarters of consumers could not recall any types of Brussels Sprouts. Low awareness was consistent with previous waves.
- Brussels Sprouts were expected to stay fresh for nearly 9 days, which was met most or all of the time.
- Top triggers for purchase were health and taste. Key barriers to purchase were wanting a variety in their diet and already consuming enough.

3.4 times per month

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

1.

Insight:

Specific health and nutritional benefits has dramatically increased as a trigger to purchase since May 2014.

Short Term Recommendation:

Appeal to Conscious Improver consumers by highlighting specific nutritional content including antioxidants, Vitamin C and Vitamin A. Capture the attention of these consumers by calling out these facts in-store, on-pack and on flyers at point of sale.

2.

Insight:

Popularity of Brussels sprouts is on the rise in the US. However, New Product Development is minimal globally.

Long Term Recommendation:

Investigate export opportunities to the US with a growing demand for Brussels sprouts. There is also potential to develop products that contain Brussels sprouts that appeal to convenience driven consumers e.g. ready-to-steam bags, and pre-halved options

Spinach Grower Action Plan.

Wave 32 Fast Facts – Spinach

- Spinach scored well on perceived importance, endorsement and interest. Future purchase intent for spinach is high.
- Purchase of spinach occurred around 5 times per month and was consumed on average 11 times per month.
- Overall, spinach was perceived to be fairly good value for money, with recalled last spend at $3.60.
- Consumers on average purchase 0.5kg of spinach, typically in a loose format, with pre-packaged formats also popular options.
- Price tracking for January 2016 revealed that the average price of Baby Spinach was $16.81 per kg, consistent with prices recorded in September 2015.
- One third of consumers could not recall a type of spinach. Baby and English were the most recalled types.
- Consistent with the last wave, spinach was expected to stay fresh for 6 days, which was met most of the time.
- Top triggers for purchase were based around health, ease of preparation, and taste. In contrast, the key barriers included not wanting to waste and a short shelf life.

11.1 times per month

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

1.

Insight:

Versatility has increased as a trigger to purchase for spinach.

Short Term Recommendation:

Highlight spinach's versatility at point of sale by providing consumers with cooking inspiration such as using spinach raw in salads, sautéing in curries and baking in quiches.

2.

Insight:

Consumption of spinach is on the rise and there is strong commitment to purchase more spinach in the future.

Long Term Recommendation:

Ensure that supply can meet demand for spinach by investigating supply channel opportunities outside of mainstream retailers. There is also opportunity to introduce new varieties of spinach to consumers.

Parsnip Grower Action Plan.

Wave 32 Fast Facts – Parsnip

- Parsnips hold lower levels of importance, satisfaction and endorsement than other vegetables, with future purchase intent relatively weaker than other commodities tracked.
- Parsnips are purchased on average three times per month and consumed on five occasions per month. Purchase is primarily from mainstream retailers and specialist fruit and vegetable retailers.
- On average consumers are purchasing 900g of parsnips per shop, noticeably higher than the previous wave (700g). Recalled last spend was $4.50, with value for money perceived as fair.
- Price tracking revealed an average price of $9.99 per kg of parsnips, consistent with the previous wave.
- There are low levels of awareness of parsnip types, with 74% of consumers unable to recall a type.
- The main motivations for purchasing include taste and adding variety. Expense and already consuming enough are the key barriers to purchase.
- Parsnips are expected to stay fresh for over a week. Expectations of freshness are met most of the time.

24% of consumers typically purchase parsnips in pre-packaged small trays.

1.

Insight:

Knowing that parsnips are grown in Australia is very important to consumers.

Short Term Recommendation:

Ensure provenance labelling for parsnips is easy to read and locate for consumers. This information is likely to encourage future purchase.

2.

Insight:

Popularity of snacking is on the rise. Consumers enjoy roasting and baking their parsnips.

Long Term Recommendation:

There is opportunity to develop snack products that contain parsnips including root vegetable chips. Encourage consumers to make these products at home by providing recipe cards and pre-prepared roast packs.

Beetroot Grower Action Plan.

Wave 32 Fast Facts – Beetroot

- Beetroot has strong levels of endorsement, indicating consumers are happy to recommend to family and friends. Future propensity to purchase is high.
- Beetroot is purchased approximately 3 times per month. Consumption of beetroot occurs 8 times per month, relatively consistent with the previous wave.
- On average, consumers purchase 0.9kg of beetroot. Recalled last spend was $3.90. Overall, consumers perceive good value for money.
- Price tracking revealed both loose and bunched beetroot could be purchased from most mainstream retailers. Average price per kg in January was $5.05.
- Awareness of beetroot types is very low, with 70% of consumers unable to recall a type.
- Beetroot is expected to remain fresh for just under 10 days. Freshness expectations are being met most of the time.
- Taste and health remain the key triggers to purchase. The main barriers to future purchase are consuming enough and wanting variety in diets, consistent with the previous wave.

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

1.

Insight:

Consumers have a limited repertoire when cooking with beetroot, primarily opting for Australian cuisines.

Short Term Recommendation:

Provide inspiration at point of sale with recipe ideas on-pack and in-store including Thai beetroot slaw, Indian beetroot curry and beetroot kebabs.

2.

Insight:

There is a movement towards less vegetable wastage in the industry overall, which is a key barrier to purchase for beetroot.

Long Term Recommendation:

Encourage consumers to use all parts of the beetroot with ideas in-store such as roasting beetroot with skin on, using beetroot leaves in salads, and sautéing in stir fries.

Sweetpotatoes Grower Action Plan.

Wave 32 Fast Facts –Sweetpotatoes

- Sweetpotato has strong endorsement, with high future purchase intent.
- Purchase of sweetpotato occurs 3 times per month and is consumed around 8 times per month, a slight increase from the last wave. Purchase is typically from mainstream retailers.
- Overall, sweetpotato is perceived to be good value for money (6.5/10). On average, consumers purchase 1.2kg of sweetpotato, typically loose. Recalled last spend is $3.60.
- Price tracking for January 2016 revealed an average price of $3.55 per kg, slightly lower than in September 2015.
- Two thirds of consumers were unable to recall a variety of sweetpotato. Those who did more often recalled the colour rather than a specific variety, with Orange / Gold / Yellow being the most recalled colour.
- Taste, ease of preparation and health are the strongest triggers to purchase, while already consuming enough for their needs and not wanting to waste any are the two biggest barriers.
- Consumers expect sweetpotato to remain fresh for nearly two weeks, which has declined over the last three waves.

64% of consumers roast sweetpotatoes

1.

Insight:

Sweetpotatoes are typically served with potatoes.

Short Term Recommendation:

To encourage greater consumption and purchase of sweetpotatoes, educate consumers about the benefits of substituting a regular potato for a sweetpotato. This includes lower calories, less carbohydrates and greater vitamin A content.

2.

Insight:

Health benefits continues to be a key driver of purchase.

Long Term Recommendation:

Support sweetpotatoes as a Superfood and encourage health conscious consumers to utilise sweetpotatoes across all meal occasions eg. fritters for breakfast, salad for lunch and baked or in curries and casseroles for dinner.

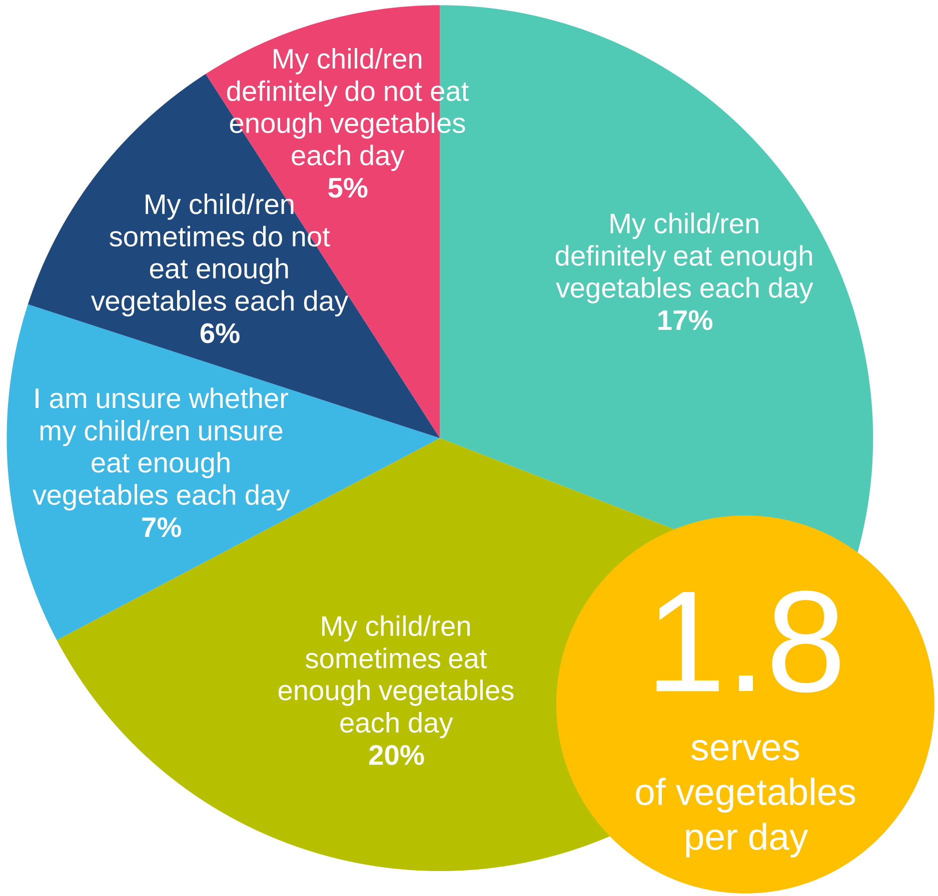
Wave 32:
Response to Ad hoc Questions

Average Vegetable Consumption

Children.

The majority of consumers believe that their children definitely or sometimes eat enough vegetables each day.

Overall, parents believe their children are eating 1.8 serves of vegetables per day, which is lower than 2.4 servings of vegetables per day tracked in Wave 8.



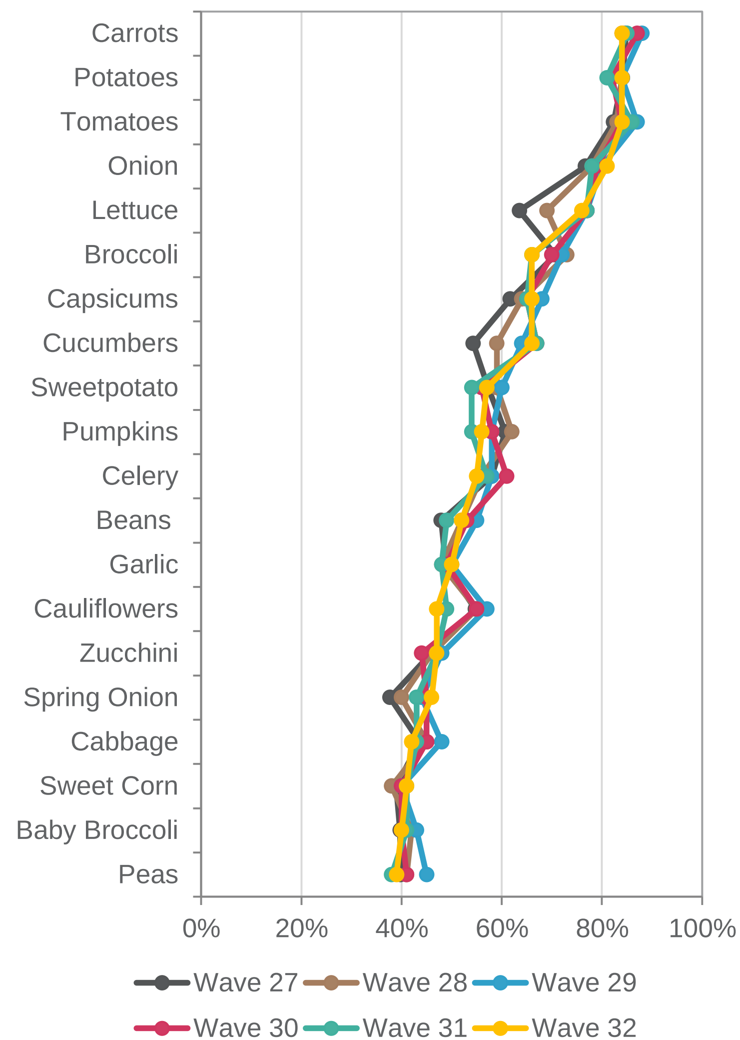
QAHW32Q1 Do you feel that your child/ren eat enough vegetables every day?
QAHW32Q2 On average, how many serves of vegetables does your child(ren) consume per day?
Children are recommended to consume 2-5 servings per day.
Serving sizes and recommended intake as per *eatforhealth.gov.au*
Base: N=614

Wave 32: Overall Vegetable Tracking

Top 20 Vegetables Purchased Last Month

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

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



Sample Wave 32 N=2029 *(base in higher as Q appears in Screener)*
S8. Which of the following fresh vegetables have you purchased in the last month?

Category Health Explained.

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

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

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

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

Asian vegetables, beetroot, sweetpotatoes, spinach and Brussels sprouts all have strong future purchase intent, whilst parsnips and capsicums appear stable.

	Asian Vegetables	Capsicum	Brussels Sprouts	Spinach	Parsnip	Beetroot	Sweet-potatoes	Vegetable Average
Importance	7.3	7.5	6.7	7.2	6.5	6.1	6.1	6.3
Satisfaction	6.5	7.3	6.0	6.8	5.8	6.0	6.5	6.6
Endorsement	7.6	7.5	7.1	7.7	6.9	7.5	7.9	7.0
Interest (New Varieties)	7.4	7.0	6.9	6.8	6.7	6.7	6.7	6.3
Future Purchase								
More	30%	10%	20%	21%	15%	26%	25%	15%
Same	70%	90%	78%	78%	84%	74%	75%	83%
Less	0%	0%	2%	1%	1%	0%	0%	1%

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

Asian Vegetables.

Purchase and consumption of Asian vegetables declined this wave. On average, consumers eat Asian vegetables twice a week.

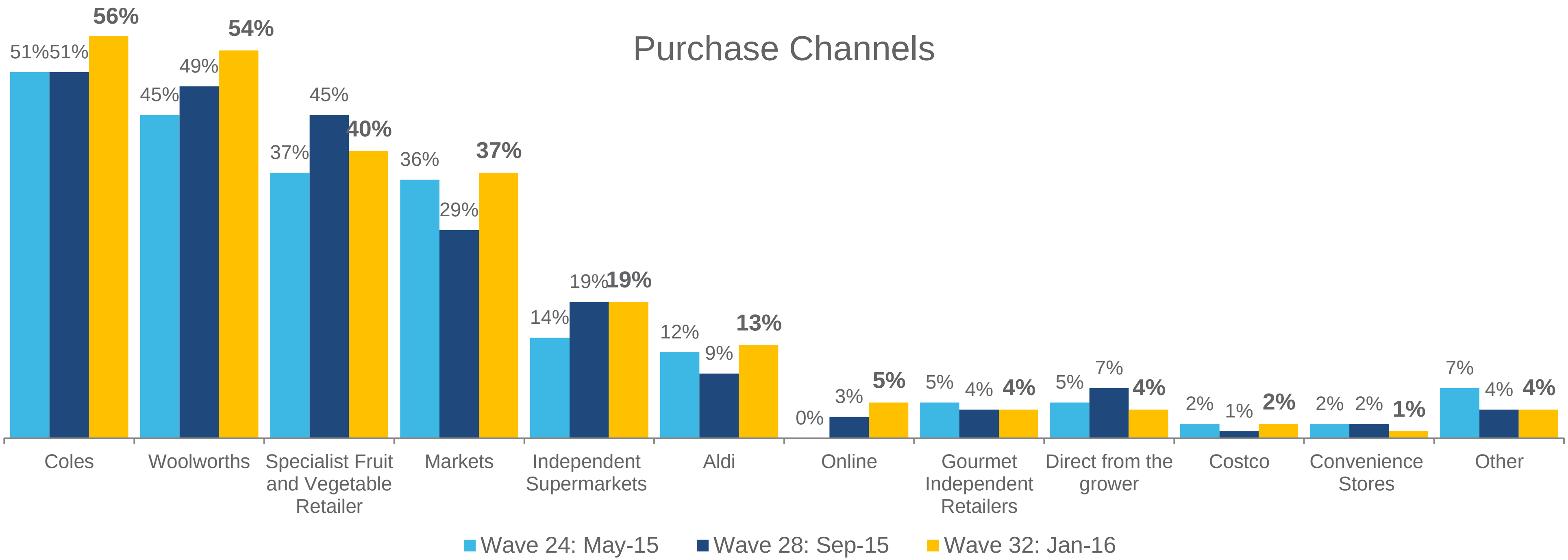
Coles remains the key location for purchase. However, there has been a increase in purchase from various other channels.

Average Purchase **4.4** times per month

▲ 5.0 times, Wave 24
▲ 5.0 times, Wave 28

Average Consumption **7.6** times per month

▲ 8.8 times, Wave 24
▲ 8.8 times, Wave 28



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 24 N=311, Wave 28 N=310, Wave 32 N=303

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

Average Spend and Price Sensitivity.

Average weight of purchase

The average consumer typically purchased **0.9kg** of Asian vegetables in January 2016, which is consistent with the previous wave.

▲ 1.0kg, Wave 24
— 0.9kg, Wave 28

Recalled last spend

The average recalled last spend in January 2016 is **$5.10**. This is slightly higher than the last wave.

▲ $5.90, Wave 24
▼ $4.80, Wave 28

Value for money

On average, consumers perceive Asian vegetables to be good value for money **(6.6/10)**, relatively consistent with previous waves.

▼ 6.7/10, Wave 24
▼ 6.8/10, Wave 28

Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typical purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 24 N=311, Wave 28 N=310, Wave 32 N=303

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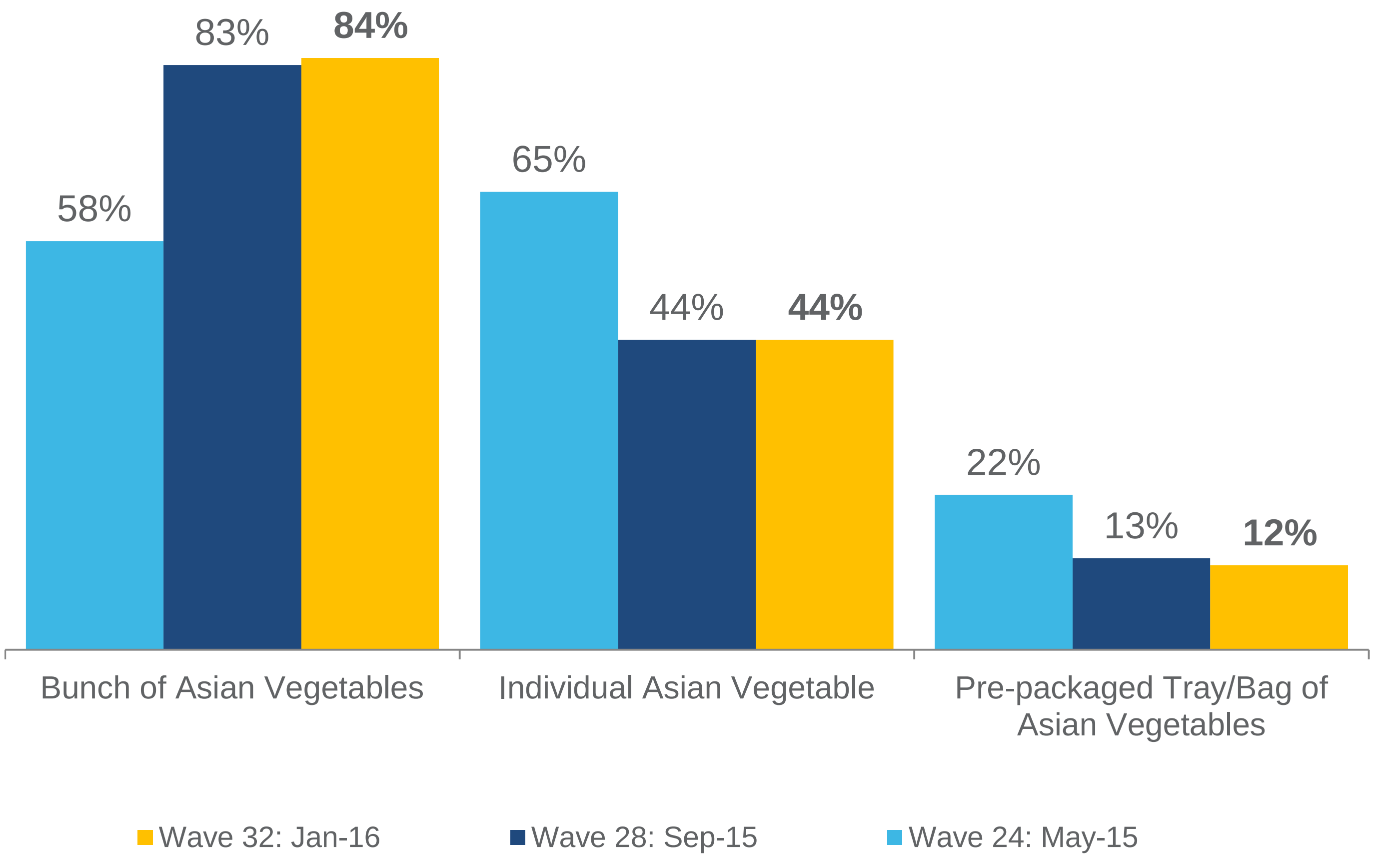
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

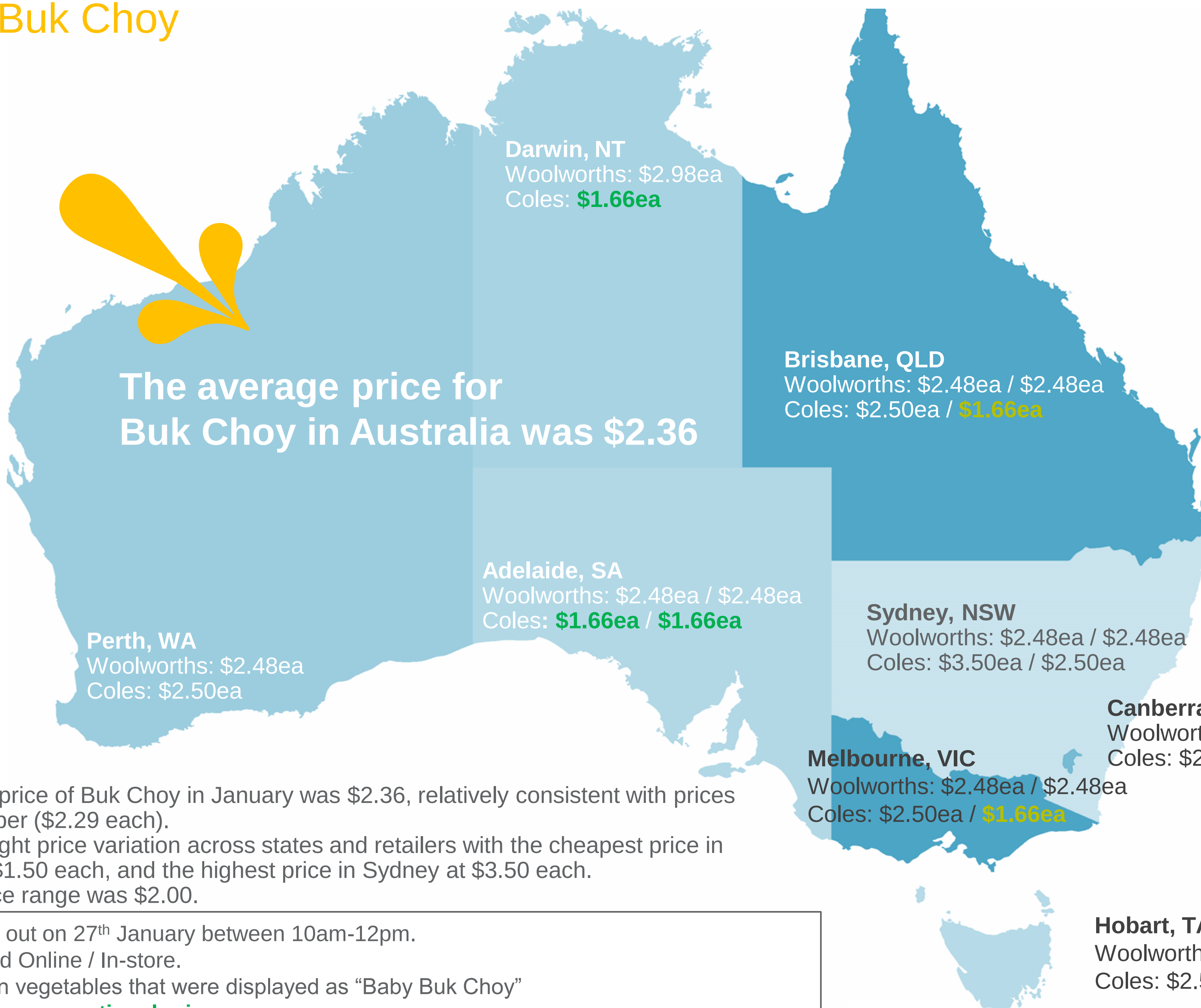
Bunched Asian vegetables continue to be the main format purchased, consistent with the previous wave.



Q4b In what fresh formats do you typically purchase Asian vegetables (bok choy, choy sum etc.)?
Sample Wave 24 N=311, Wave 28 N=310, Wave 32 N=303

Online and In-store Commodity Prices.

Baby Buk Choy

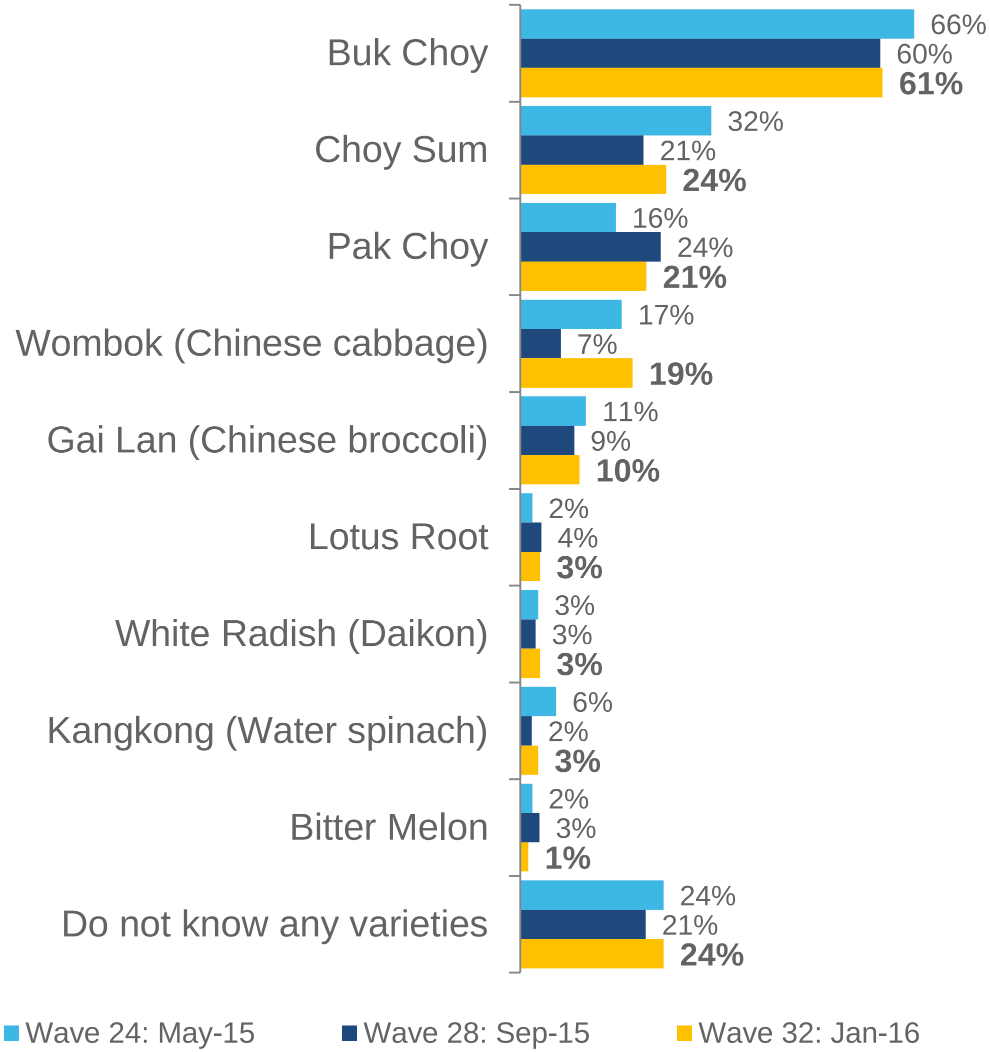


- The average price of Buk Choy in January was $2.36, relatively consistent with prices from September ($2.29 each).
- There was slight price variation across states and retailers with the cheapest price in Canberra at $1.50 each, and the highest price in Sydney at $3.50 each.
- The retail price range was $2.00.

Pricing was carried out on 27th January between 10am-12pm.
Prices are displayed Online / In-store.
Prices are based on vegetables that were displayed as “Baby Buk Choy”
Green text indicates promotional price.

Awareness of Asian vegetable varieties has remained relatively consistent over the last three waves.

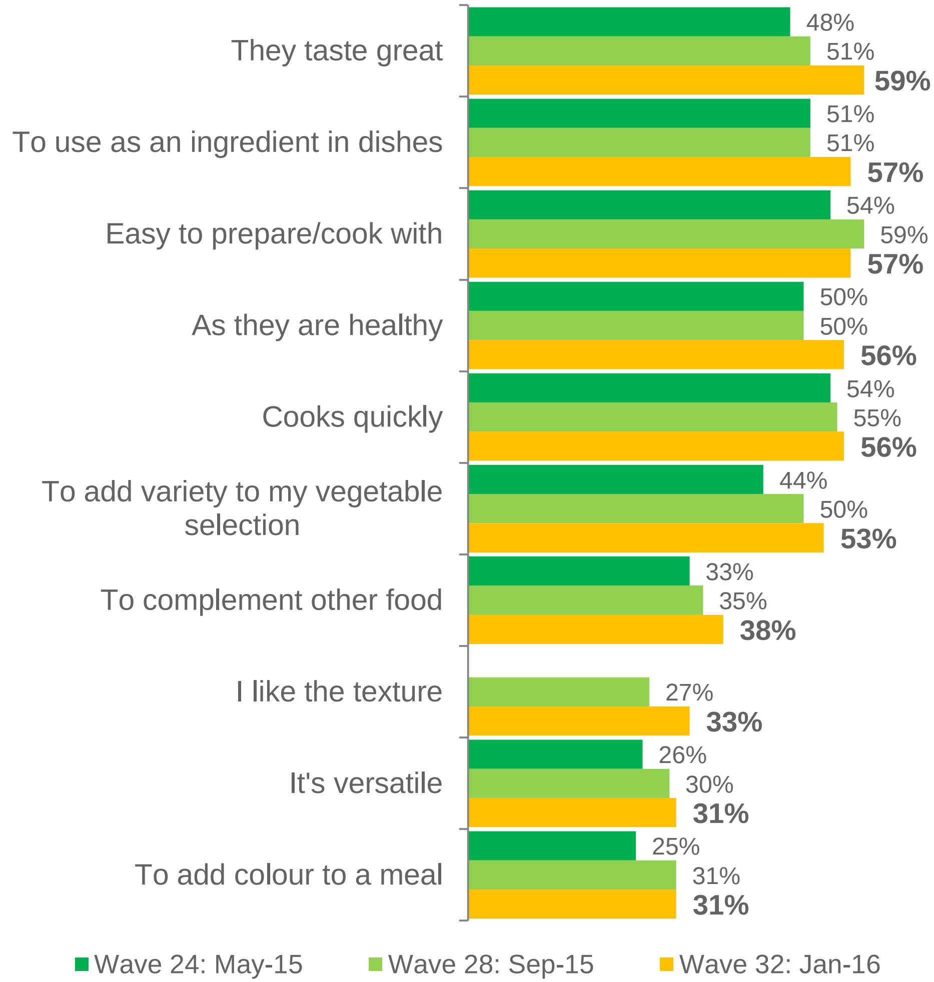
Buk Choy and Choy Sum have the greatest recall amongst consumers, with Wombok increasing in awareness this wave.



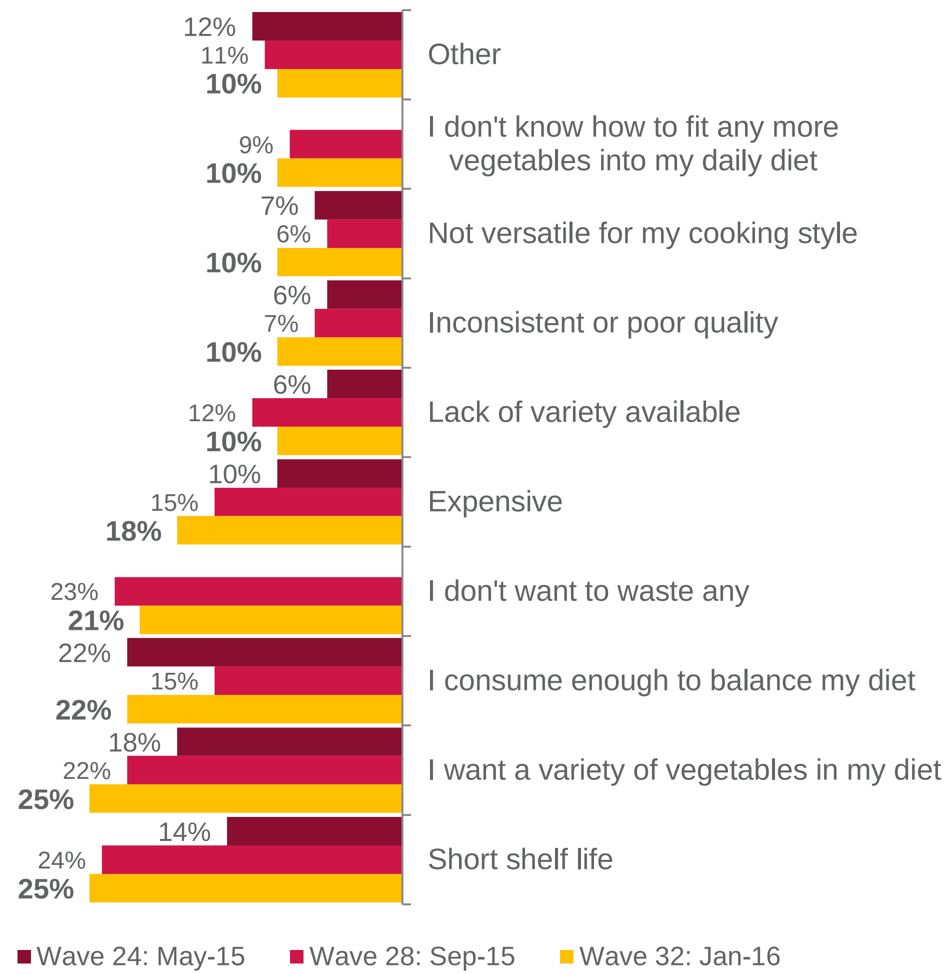
Q6a. What varieties/types of <commodity> are you aware of? (unprompted)
Sample Wave 24 N=311, Wave 28 N=310, Wave 32 N=303

Taste and use as an ingredient are the main drivers of purchase. The key barriers to purchase are short shelf life and wanting a variety in their diet. There is an increasing trend in expense as a barrier 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 24 N=311, Wave 28 N=310, Wave 32 N=303

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

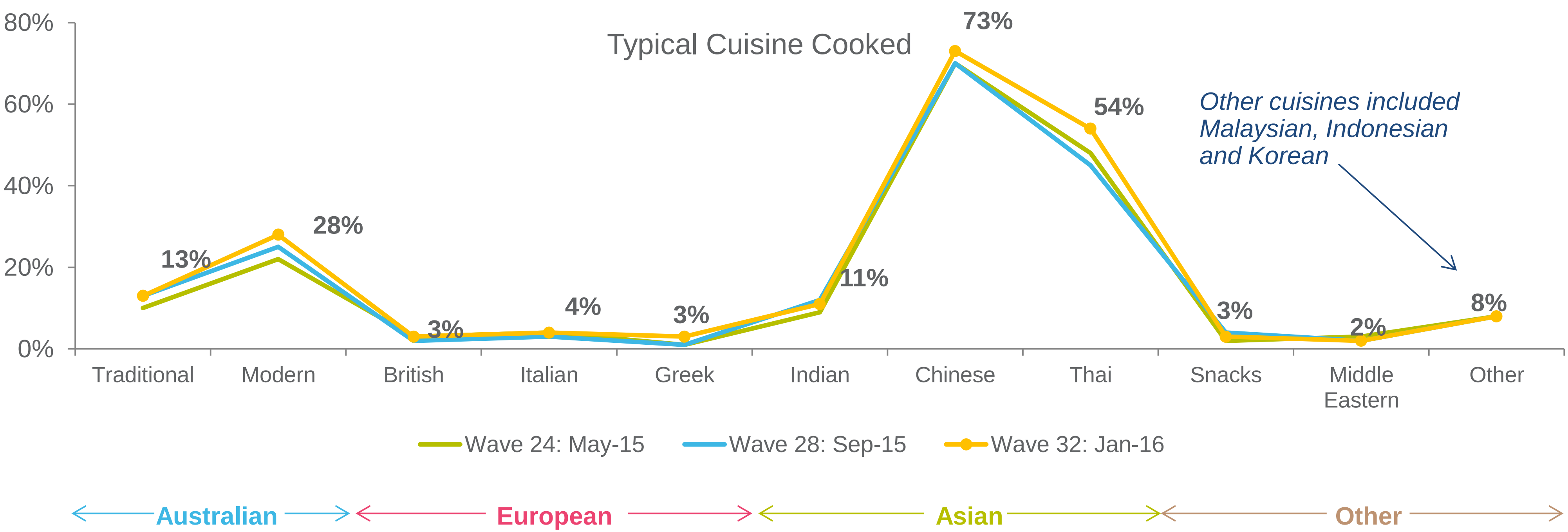
Consumers are cooking Chinese, Thai and Vietnamese cuisines, consistent with previous waves.

Top 5 Consumption Occasions

	Wave 28	Wave 32
Dinner	72%	**75%**
Family Meals	57%	**59%**
Quick Meals	49%	**51%**
Weekday Meals	48%	**50%**
Weekend Meals	39%	**39%**

25% used Asian vegetables when cooking a new recipe

▼ 21%, Wave 28



Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?
Sample Wave 24 N=311, Wave 28 N=310, Wave 32 N=303

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

Cooking preferences remain consistent between waves. Consumers typically stir fry Asian vegetables. There has been an increasing trend in sautéing over the last three waves. Asian vegetables are cooked with carrots, capsicums and onion.

Accompanying Vegetables

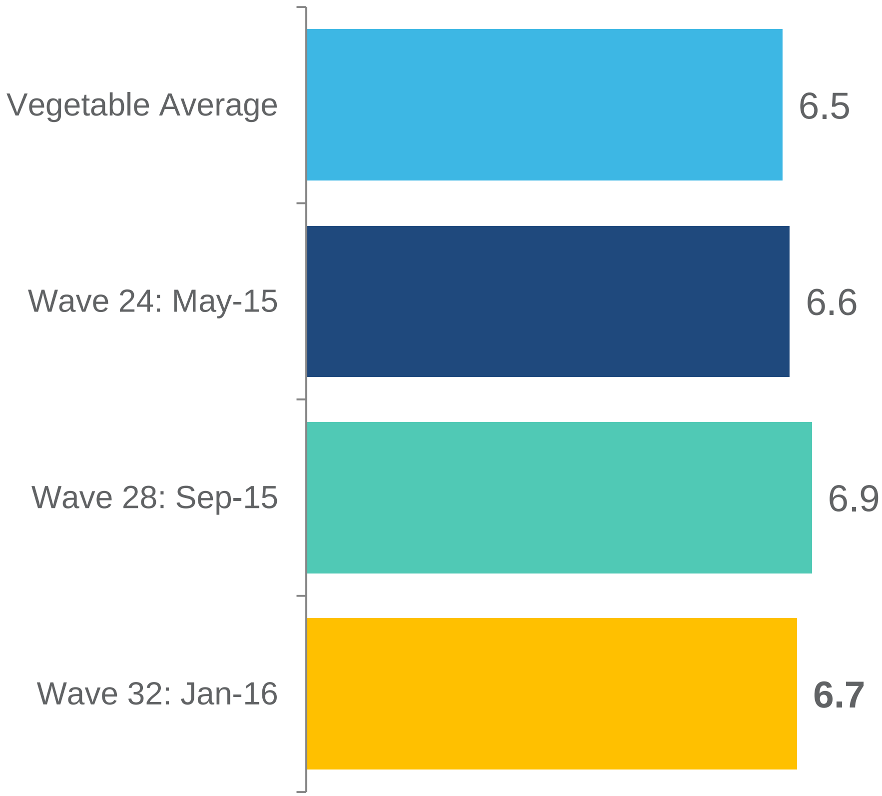
Carrot	55% ▼
Capsicum	54% ▲
Onion	53% ▲
Garlic	49% ▲
Spring Onion	48% ▲

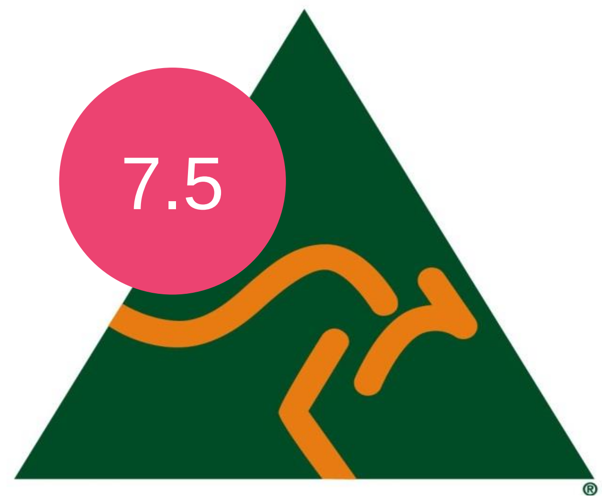
Top Cooking Styles

	Wave 24	Wave 28	Wave 32
Stir frying	78%	82%	**84%**
Steaming	42%	45%	**49%**
Sautéing	22%	23%	**31%**
Soup	24%	26%	**25%**
Boiling	16%	18%	**19%**
Frying	1%	17%	**16%**
Raw	8%	13%	**15%**
Slow Cooking	5%	10%	**7%**
Microwave	7%	10%	**6%**
Grilling	1%	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 24 N=311, Wave 28 N=310, Wave 32 N=303

Asian vegetable provenance has slightly declined in importance this wave, but still sits above the Vegetable Average.





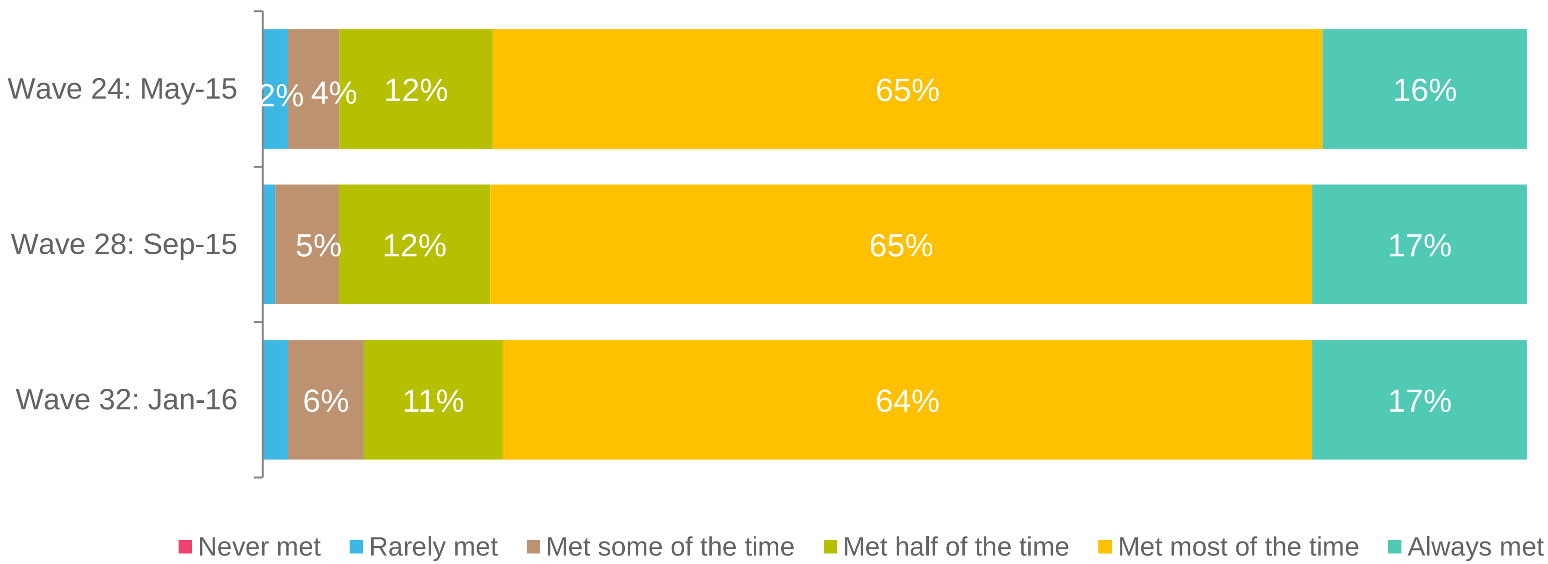
Q14. When purchasing <commodity>, how important is Provenance to you?
Q15. And when purchasing <commodity>, how important is that it is grown in Australia?
Mean scores out of 10.
Sample Wave 24 N=311, Wave 28 N=310, Wave 32 N=303

Once purchased, consumers expect Asian vegetables to remain fresh for nearly six days. Expectations of freshness are met most of the time, consistent with past waves.

Expected to stay fresh for **5.7** days

▼ 5.6 days, Wave 24
▲ 5.8 days, Wave 28

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 24 N=311, Wave 28 N=310, Wave 32 N=303

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

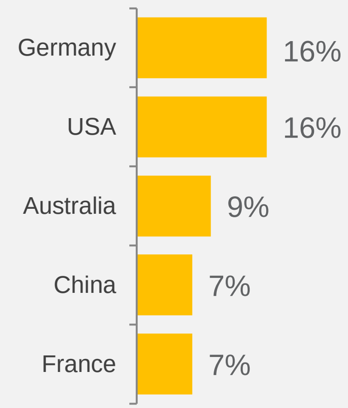
Trends: Asian Vegetables

Asian Vegetables Global NPDs

November 2015 – January 2016

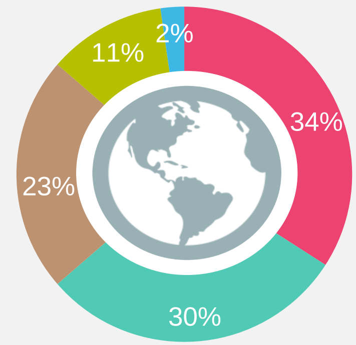
There were 44 launches in the last three months that contained Asian Vegetables as an ingredient. Products are primarily launched in Europe and Asia Pacific regions. The main categories for launches are snacks, meals, and sauces & seasonings.

Country

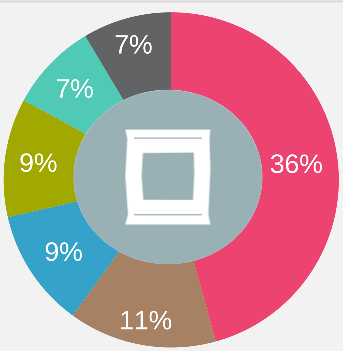


44 Global Launches

Region



Top Pack Formats



Categories

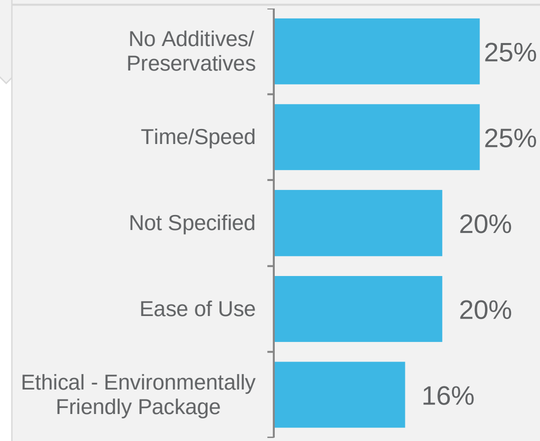
Snacks 27%

Meals 25%

Sauces & Seasonings 16%

Processed Products 7%

Top Claims



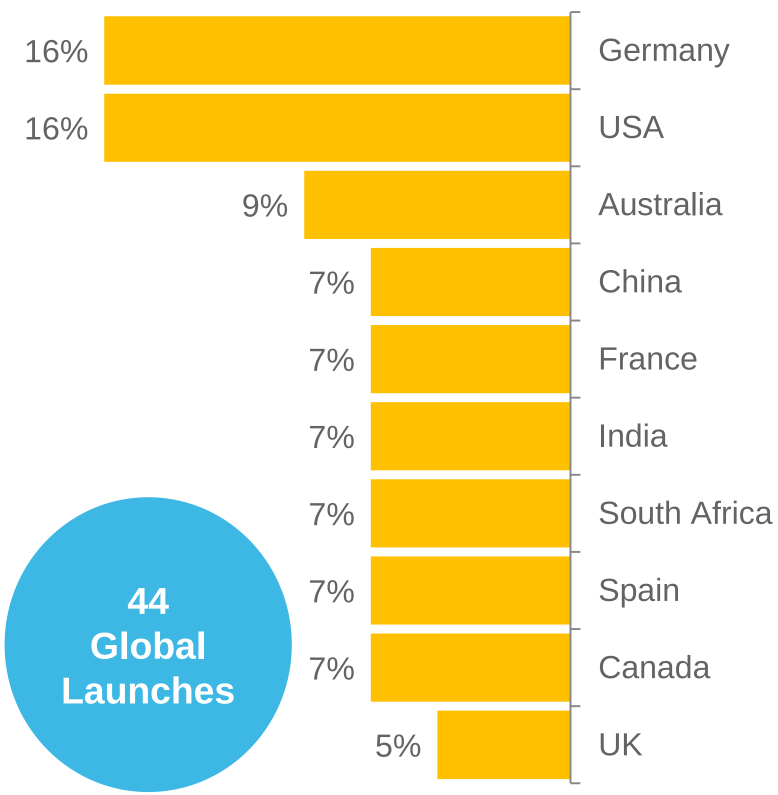
Asian Vegetables Product Launches:
Last 3 Months (November 2015 – January 2016)
Summary

- There were 44 products launched over the last three months that contained Asian Vegetables as an ingredient.
- There were 4 products launched in Australia this wave.
- Europe (34%) and Asia Pacific (30%) were the main regions for launches.
- Flexible formats remained the most common type of packaging (36%),
- The top category launches were snacks (27%), meals (25%), sauces and seasonings (16%) and processed products (7%).
- Popular claims used were around no additives/preservatives (25%), time/speed (25%) and ease of use (20%).
- The most innovative Asian Vegetable product was the Ready to Wok Asian Vegetable Mix from Germany.

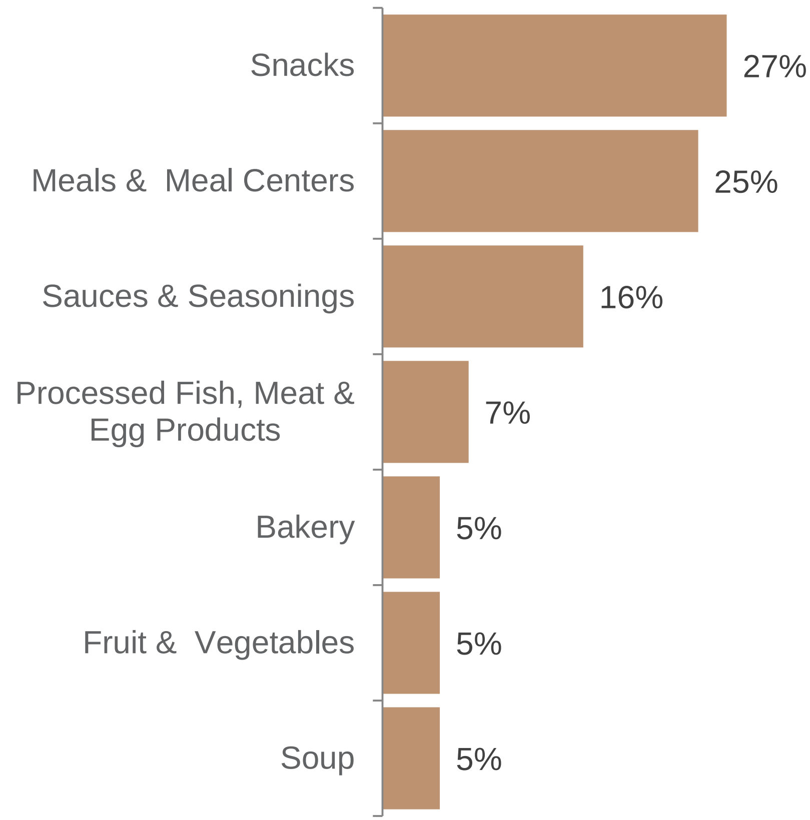
Source: Mintel (2016)

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

Top Launch Countries



Top Launch Categories



The main claims globally were no additives & preservatives, time/speed, and ease of use.

Flexible formats and tubs are primarily used for Asian vegetable products.

Pack Formats Used

Global	Flexible	36%
	Flexible Sachet	11%
	Tub	9%

Top Claims Used

Global	No Additives/Preservatives	25%
	Time/Speed	25%
	Ease of Use	20%

Only regions with n >30 are displayed

Innovative Asian Vegetables Launches:

L3M (November 2015 – January 2016)

Tacken Ready to Wok Asian Vegetable Wok Mix (Germany)

Tacken Ready to Wok Wok-Mix Asia (Asian Vegetable Wok Mix) is now available. The ready to prepare product is washed straight after harvest and can be used to quickly and easily prepare a meal. It retails in a 250g pack.

Claims:
Time/Speed, Ease of Use

Wegmans Asian Classics Spicy Green Sriracha Sauce (USA)

Wegmans Asian Classics Spicy Green Sriracha Sauce is new to the range. This product is free from lactose and gluten and retails in a 16-fl. oz. bottle.

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

President's Choice Chicken & Vegetable Potstickers (Canada)

President's Choice Chicken & Vegetable Potstickers comprise Asian-inspired dumplings filled with chicken, cabbage, napa cabbage, green onion, shiitake mushroom and ginger. They are said to be ready in minutes, and perfect as a main course, snack or appetizer. This product contains no artificial flavours or artificial colour, and retails in a 454g resealable pack bearing the Canada Sanitary Authority logo.

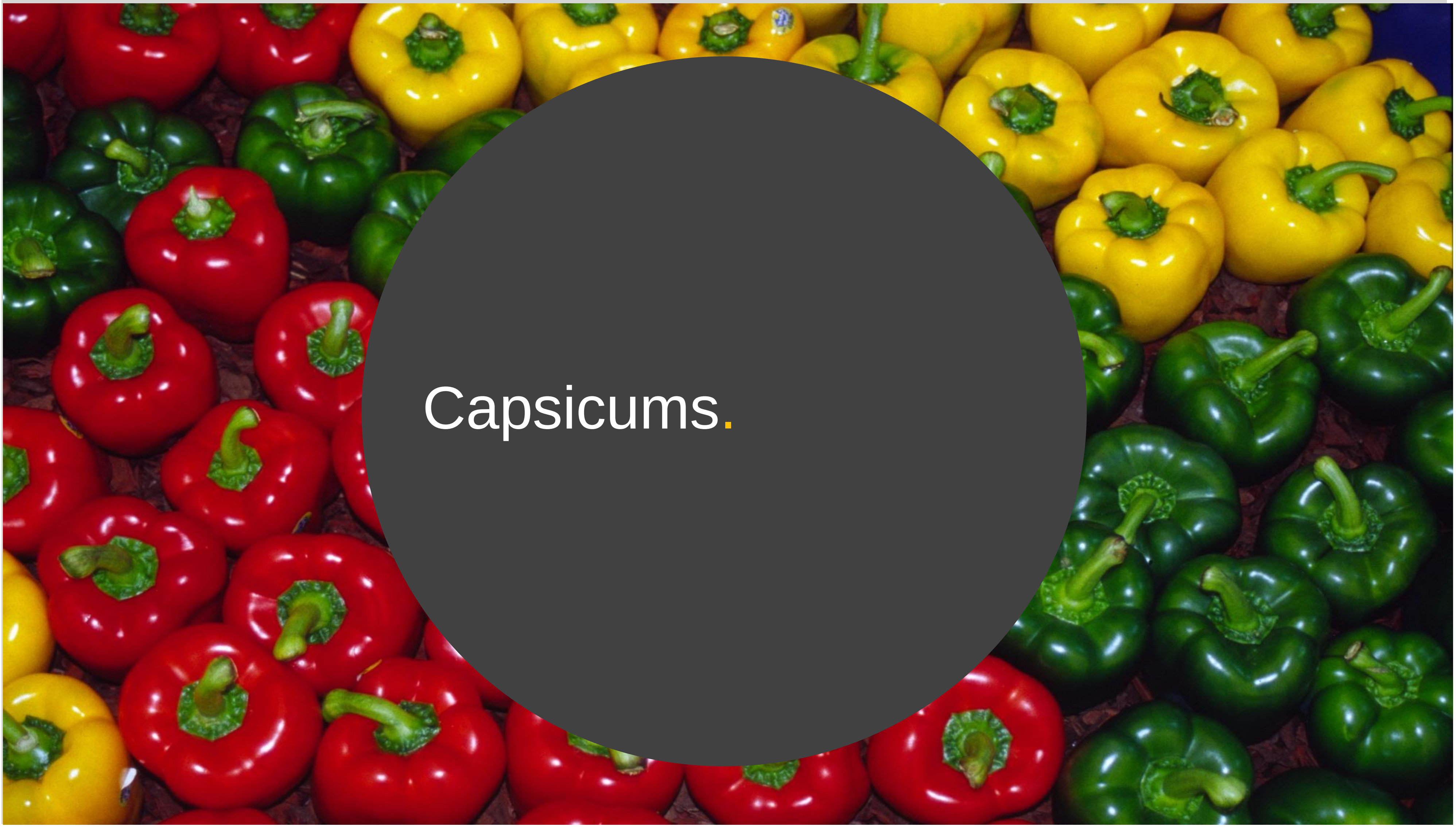
Claims:
No Additives/Preservatives, Time/Speed, Convenient Packaging

Woolworths Food Easy to Entertain East Asian Party Selection Platter (South Africa)

Woolworths Food Easy to Entertain East Asian Party Selection Platter consists of a selection of 40 Asian snacks including mini vegetable spring rolls, sweet chilli chicken moneybags, and crispy crouton chicken balls with fresh chilli and coriander sauce. This product retails in a partly recyclable pack.

Claims:
Ethical - Environmentally Friendly Package, Ease of Use

Source: Mintel (2016)



Capsicums.

Both purchase and consumption frequency increased this wave, with consumers purchasing capsicum approximately once a week.

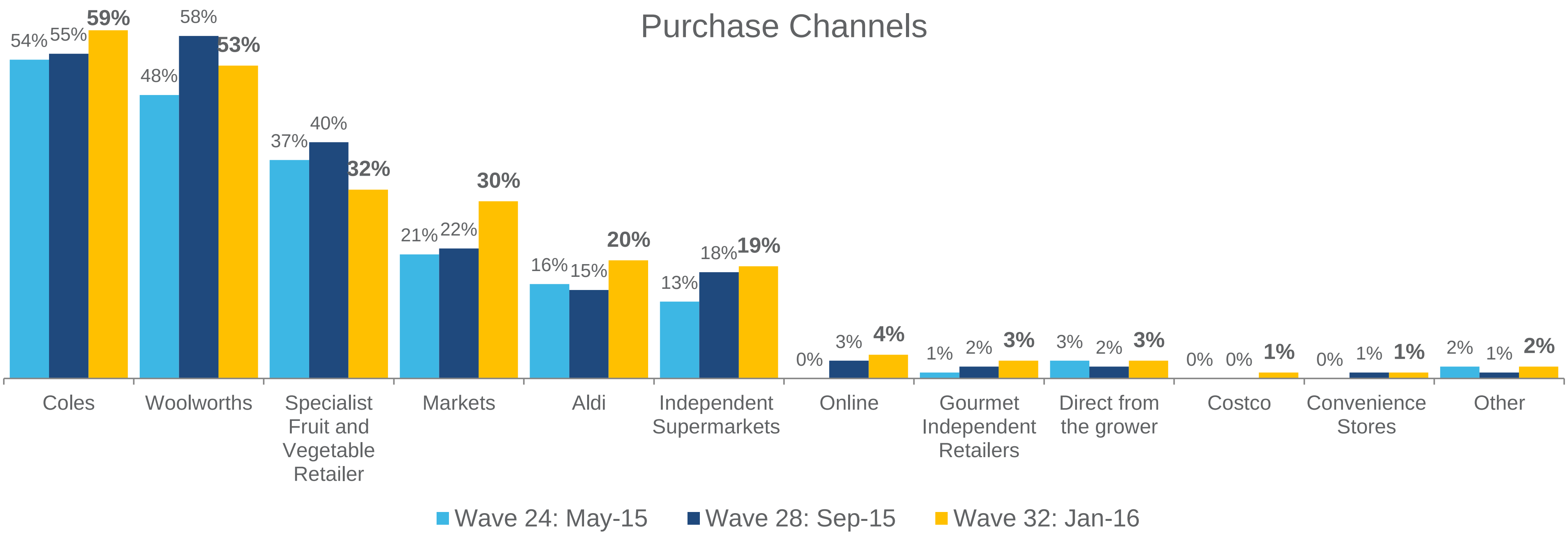
Capsicum is generally purchased from mainstream and specialist retailers, with purchase from markets consistently trending upwards.

Average Purchase **4.2** times per month

▼ 3.5 times, Wave 24
▼ 4.1 times, Wave 28

Average Consumption **10.5** times per month

▼ 9.2 times, Wave 24
▼ 10.3 times, Wave 28



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 24 N=307, Wave 28 N=319, Wave 32 N=308

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 purchased **660g** of capsicum in January 2016, which has increased from the previous wave.

▼ 610g, Wave 24
▼ 610g, Wave 28

Recalled last spend

The average recalled last spend for capsicum was **$4.20**, which has consistently increased over the last three waves.

▼ $3.60, Wave 24
▼ $3.80, Wave 28

Value for money

On average, consumers perceived capsicum to be fair value for money **(5.9/10)**, relatively consistent with the past waves.

▼ 5.7/10, Wave 24
▲ 6.0/10, Wave 28

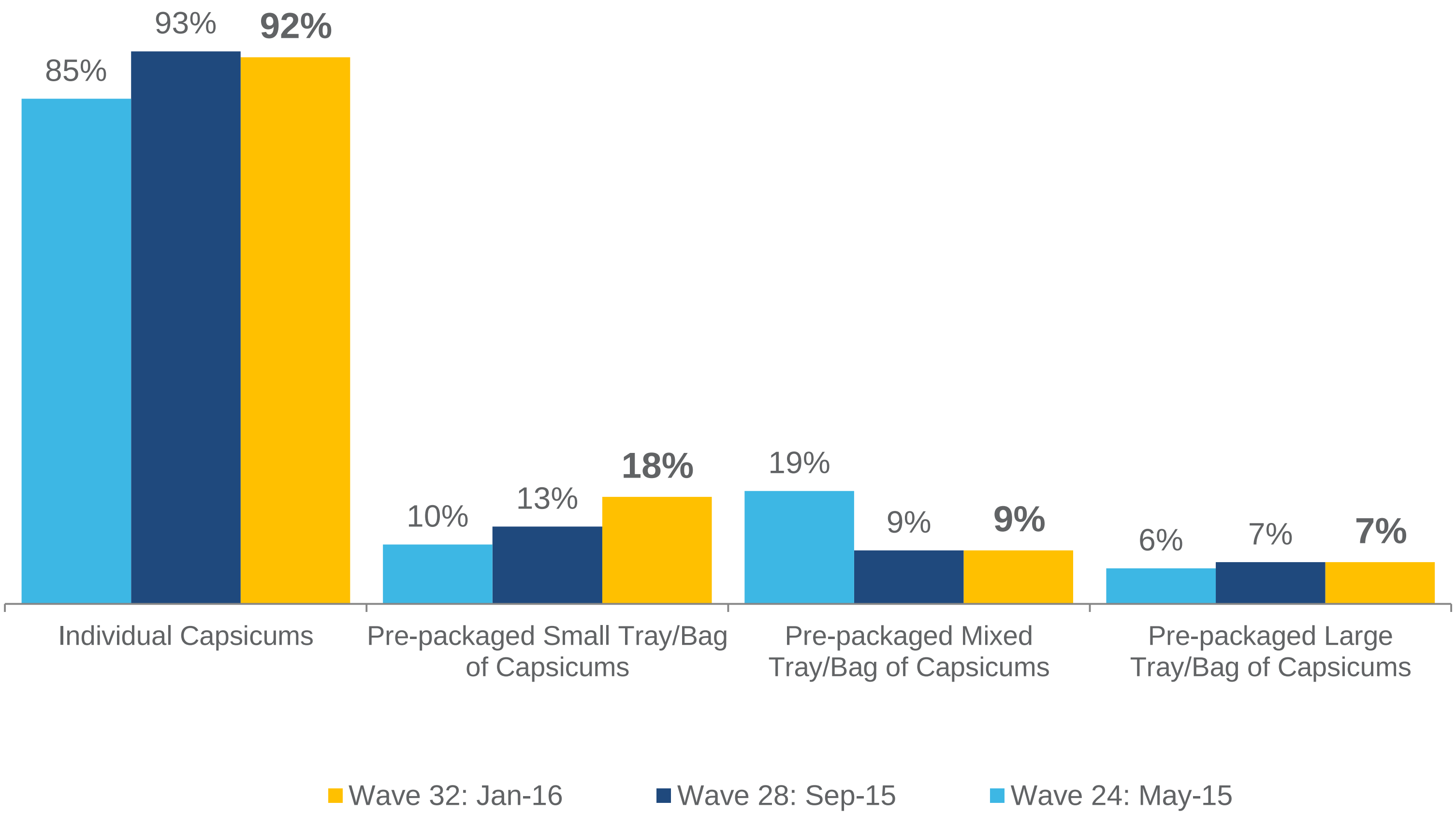
Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is?
Sample Wave 24 N=307, Wave 28 N=319, Wave 32 N=308

Horticulture Innovation Australia

colmar brunton.

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

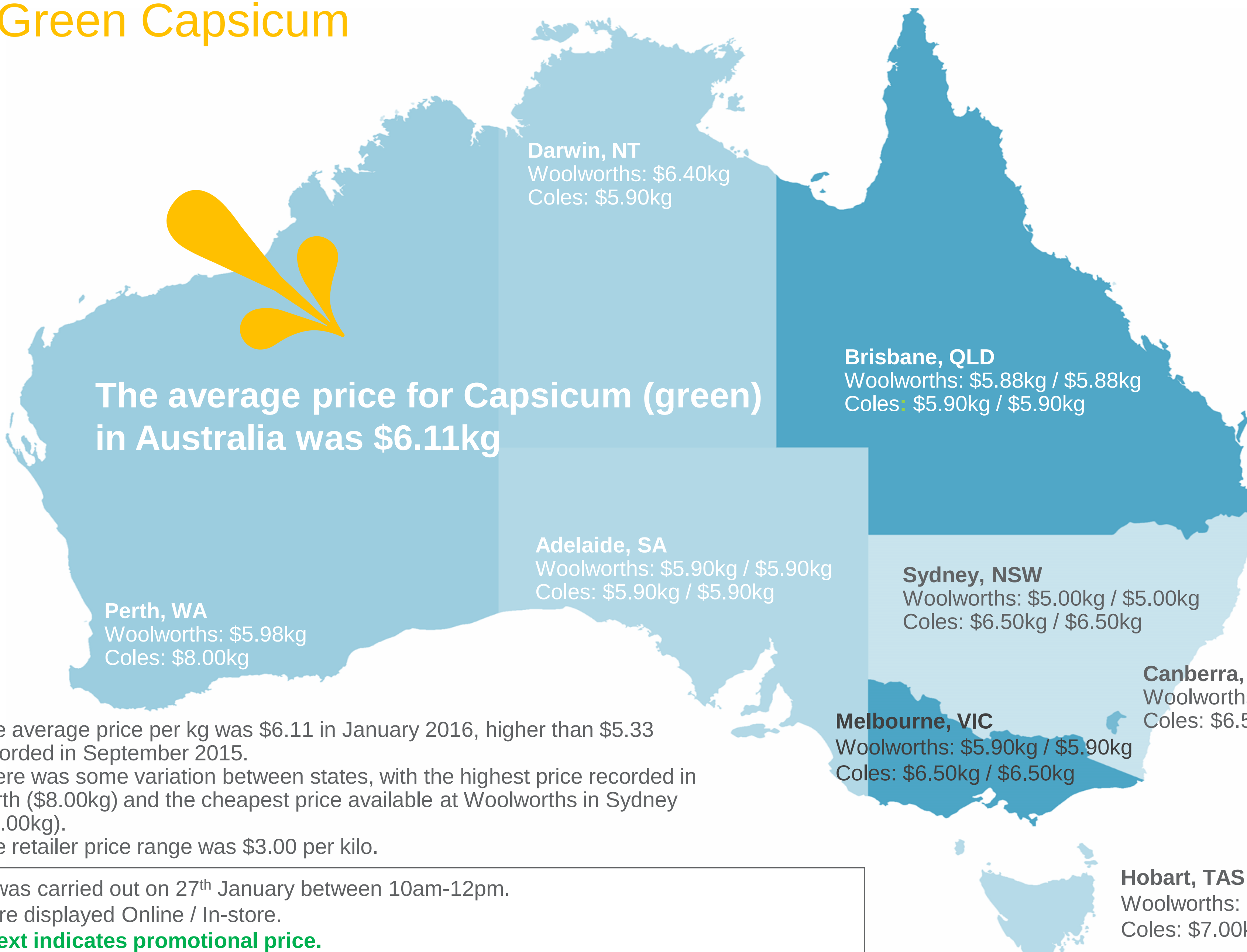
Individual capsicums remain the key format for purchase, consistent with previous waves. This month saw the continuing increase in the purchase of small trays of capsicums.



Q4b. In what fresh formats do you typically purchase Capsicums?
Sample Wave 24 N=307, Wave 28 N=319, Wave 32 N=308

Online and In-store Commodity Prices

Green Capsicum

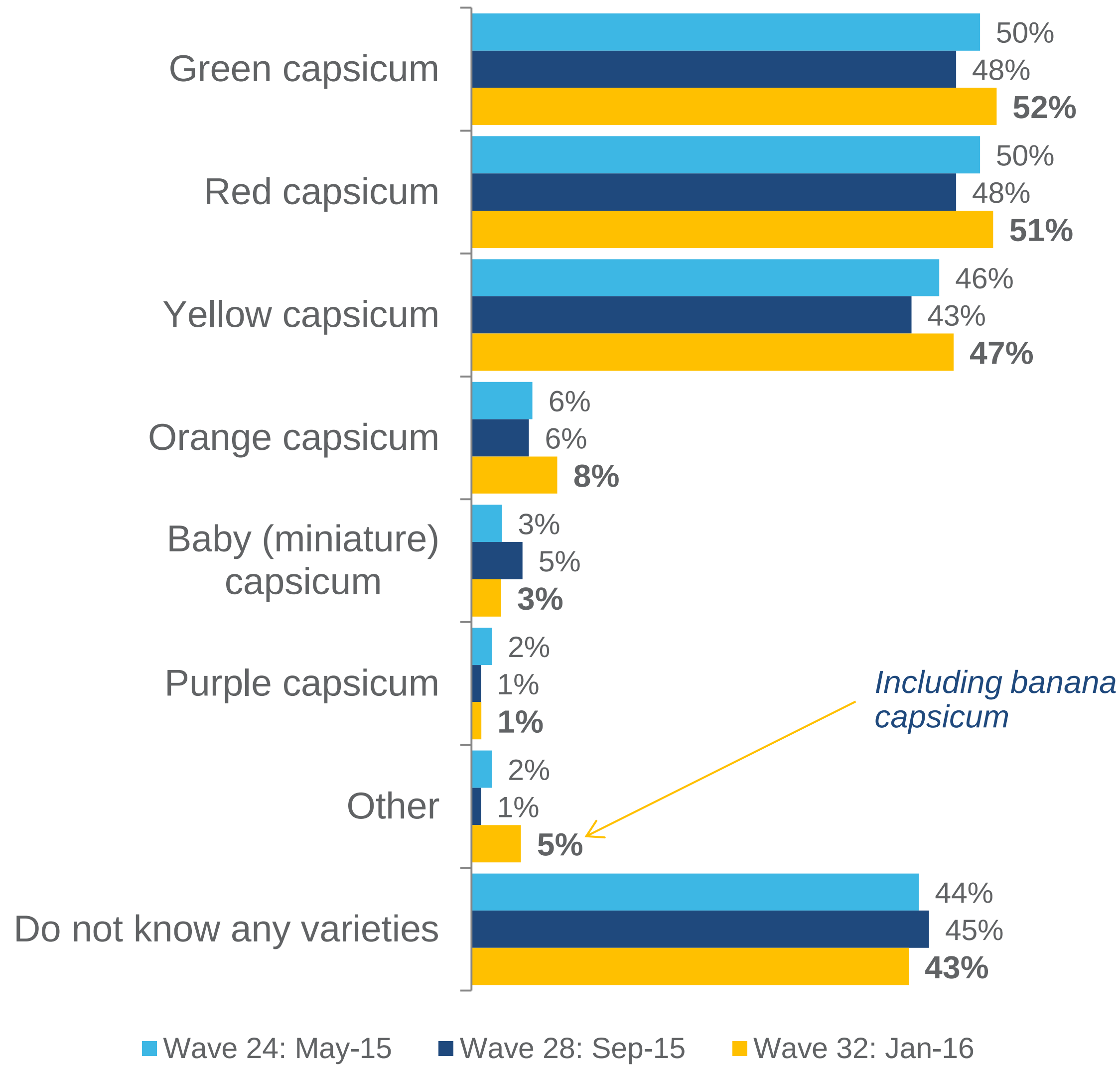


- The average price per kg was $6.11 in January 2016, higher than $5.33 recorded in September 2015.
- There was some variation between states, with the highest price recorded in Perth ($8.00kg) and the cheapest price available at Woolworths in Sydney ($5.00kg).
- The retailer price range was $3.00 per kilo.

Pricing was carried out on 27th January between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates promotional price.

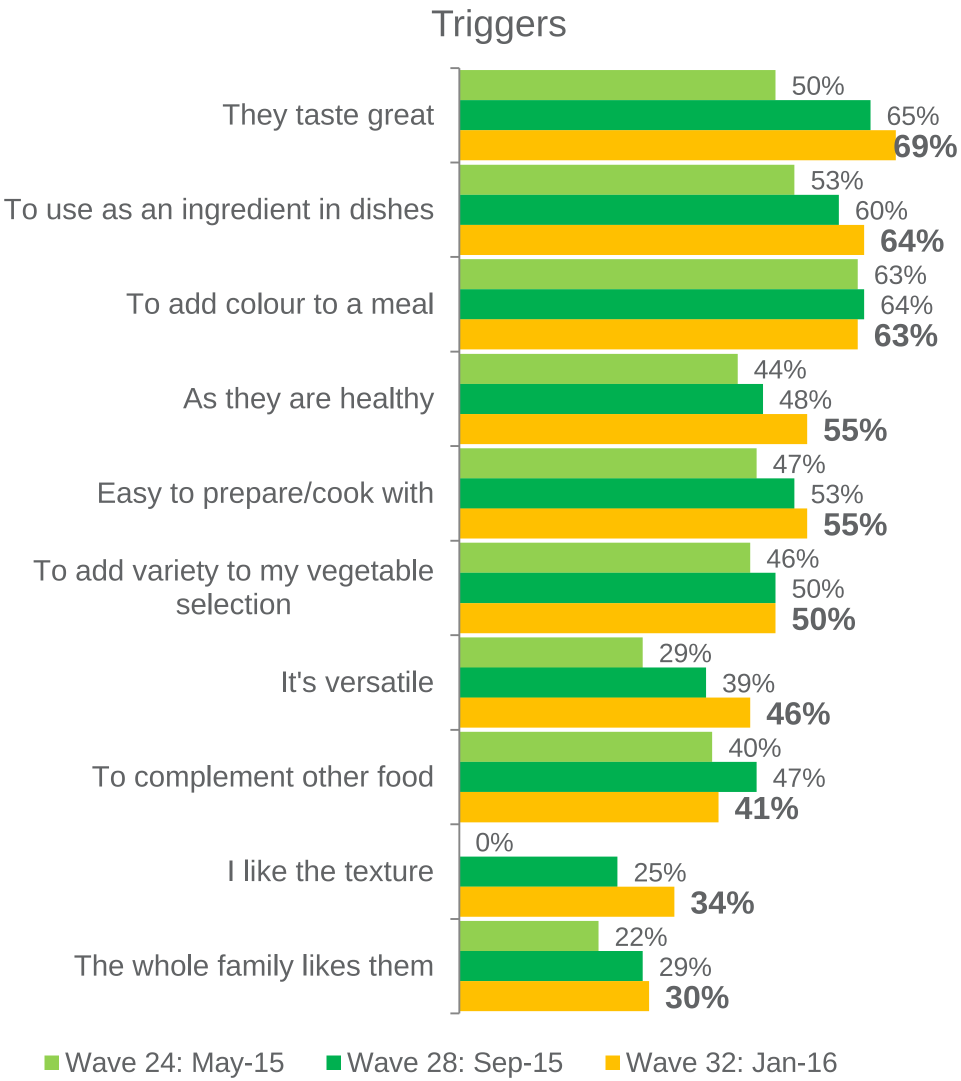
Green, red and yellow capsicums have the greatest level of recall, consistent with previous waves.

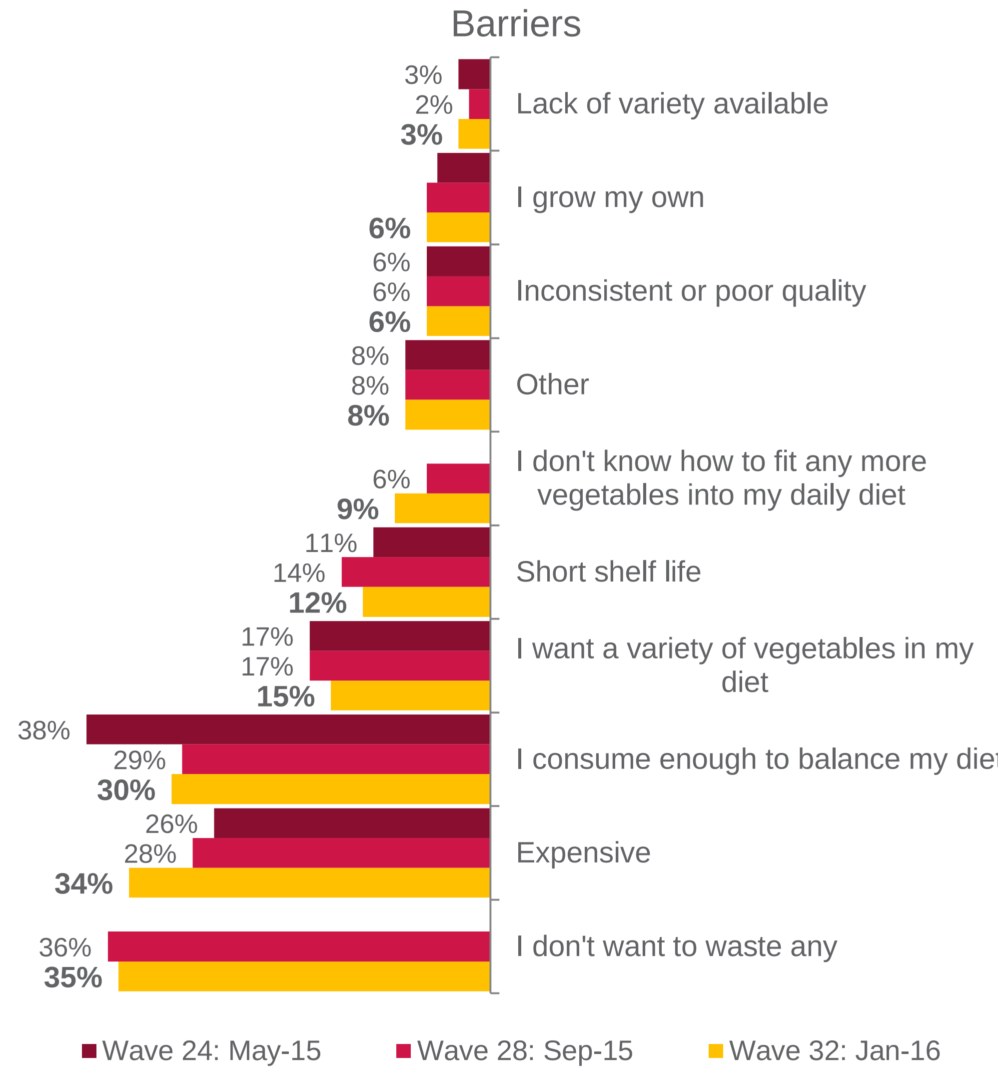
However, almost half of all consumers cannot recall a type.



Q6a. What varieties of <commodity> are you aware of? (unprompted)
Sample Wave 24 N=307, Wave 28 N=319, Wave 32 N=308

The key triggers to purchase were taste and use as an ingredient. The main barriers to purchase included not wanting to waste any and being too expensive.





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 24 N=307, Wave 28 N=319, Wave 32 N=308

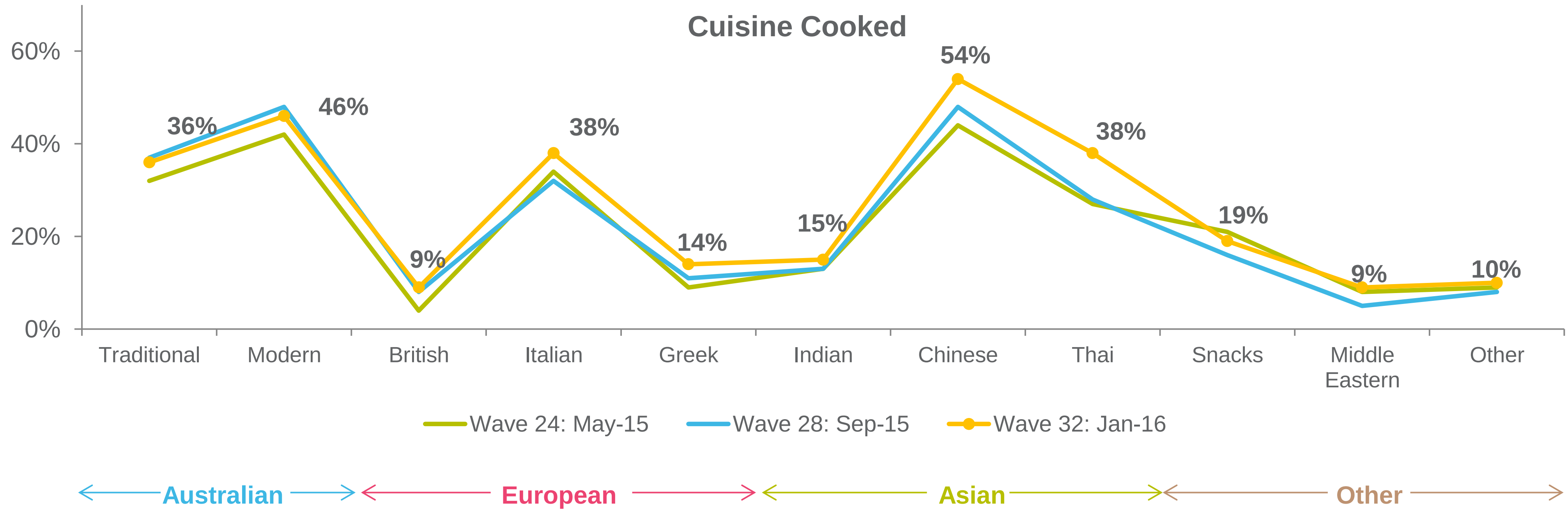
Capsicums are most frequently cooked in Asian and Australian cuisine, particularly Chinese and Modern Australian. This wave sees a noticeable increase in Thai cuisine cooked. Dinner remains the main consumption occasion.

Top 5 Consumption Occasions

	Wave 28	Wave 32
Dinner	74%	**73%**
Family Meals	58%	**58%**
Quick Meals	56%	**54%**
Weekday Meals	45%	**54%**
Lunch	41%	**45%**

26% used capsicum when cooking a new recipe

▼ 23%, Wave 28



Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?
Sample Wave 24 N=307, Wave 28 N=319, Wave 32 N=308

Horticulture Innovation Australia

colmar brunton.

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

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

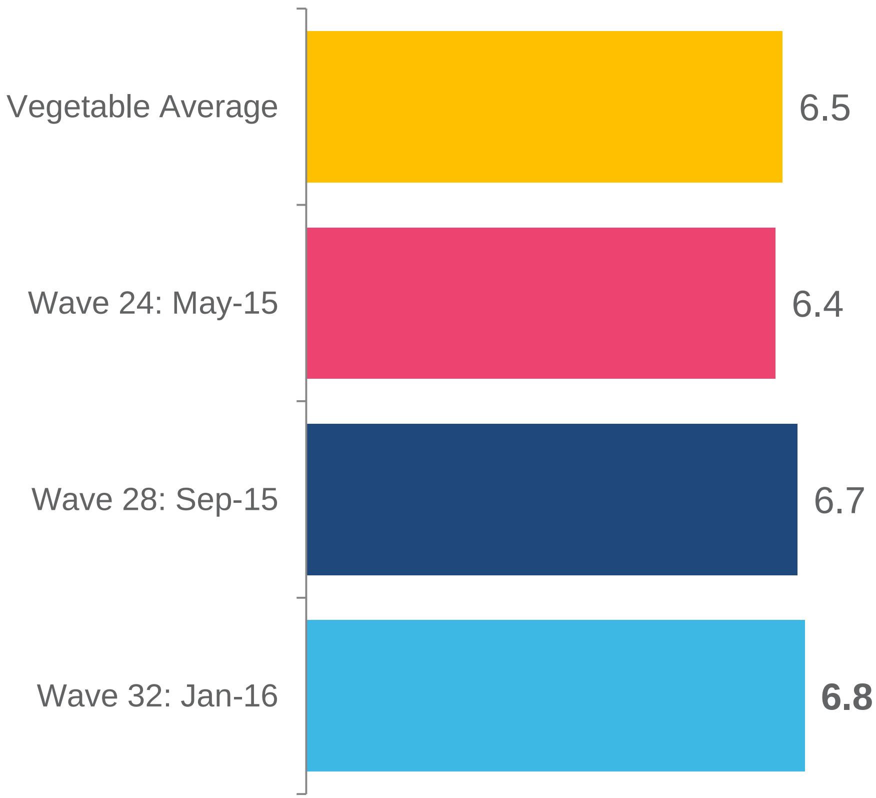
Accompanying Vegetables

Onion	62% ▲
Tomato	61% ▲
Carrot	55% ▲
Lettuce	39% ▼
Garlic	37% ▲

Top 10 Cooking Styles			
	Wave 24	Wave 28	Wave 32
Stir frying	69%	73%	**78%**
Raw	52%	53%	**60%**
Roasting	27%	33%	**33%**
Sautéing	19%	19%	**26%**
Grilling	20%	20%	**25%**
Frying	1%	29%	**24%**
Baking	18%	20%	**20%**
Slow Cooking	19%	19%	**19%**
Steaming	6%	10%	**13%**
Soup	17%	14%	**12%**

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 24 N=307, Wave 28 N=319, Wave 32 N=308

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



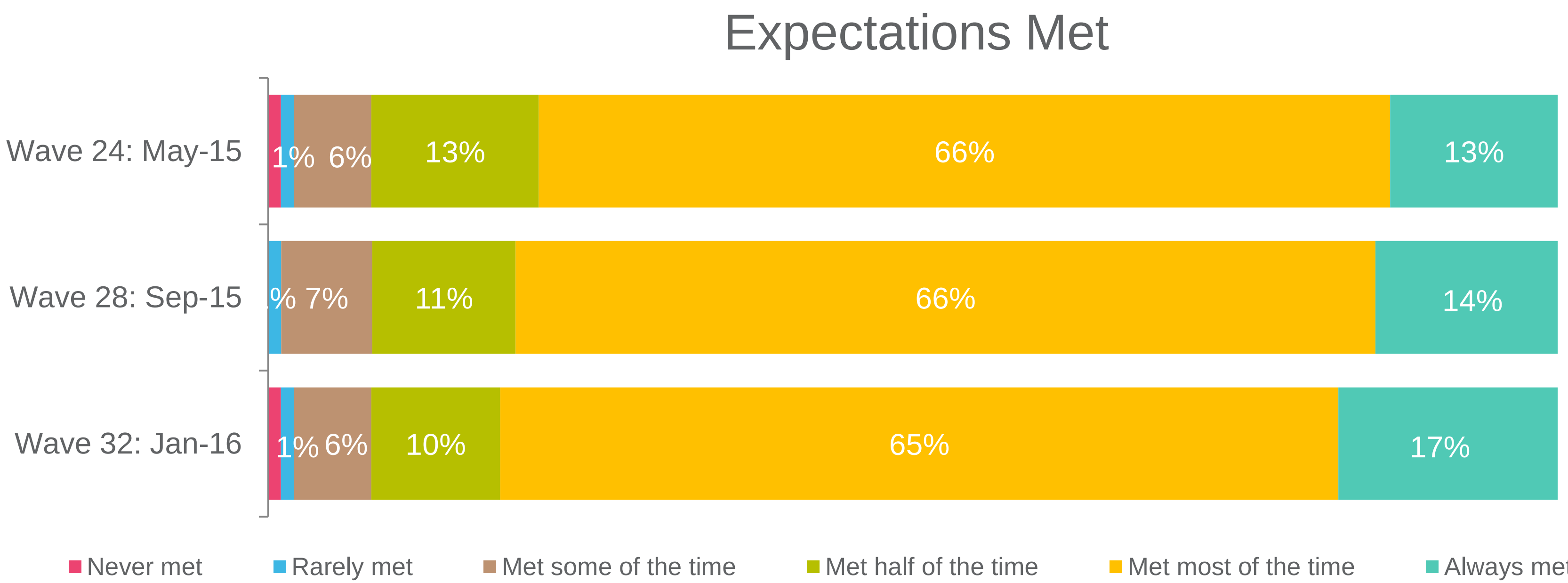
8.0

Q14. When purchasing <commodity>, how important is Provenance to you?
Mean scores out of 10.
Sample Wave 24 N=307, Wave 28 N=319, Wave 32 N=308

Capsicums are expected to remain fresh for eight days once purchased, which has slightly declined over the last three waves. This wave saw an improvement in expectations of freshness, with an increase in freshness always being met.

Expected to stay fresh for **8.0** days

▲ 8.4 days, Wave 24
▲ 8.2 days, Wave 28



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 24 N=307, Wave 28 N=319, Wave 32 N=308

Horticulture Innovation Australia

colmar brunton.

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

Trends: Capsicums

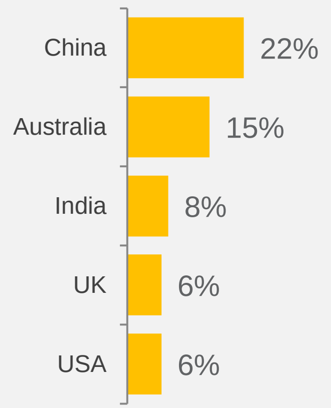
**Mintel search term was Capsicum*

Capsicum Global NPDs.

November 2015 – January 2016

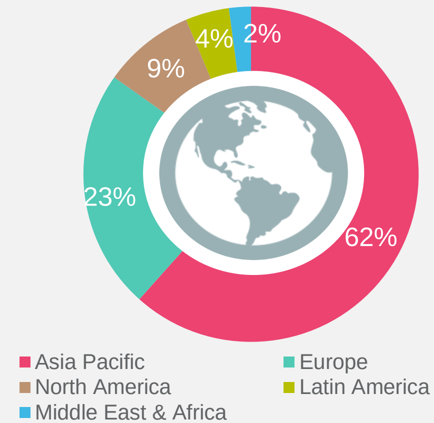
There were 237 products launched over the last three months that contained Capsicum as an ingredient. A large portion of these products were launched in Asia Pacific, specifically China, Australia and New Zealand. New products were snacks, meals, sauces and processed products.

Country

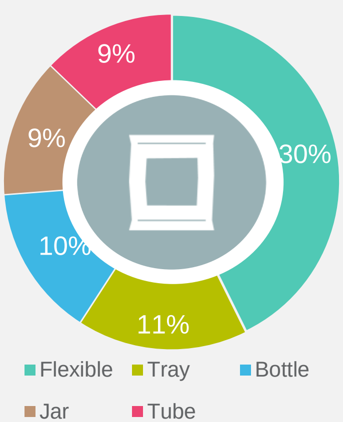


237 Global Launches

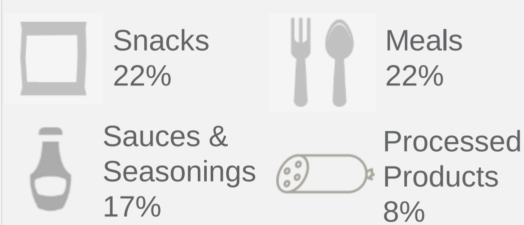
Region



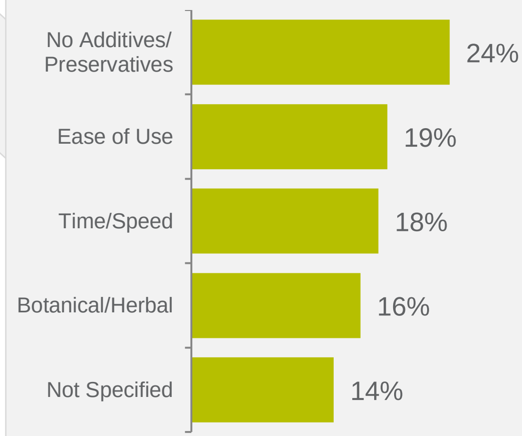
Top Pack Formats



Categories



Top Claims



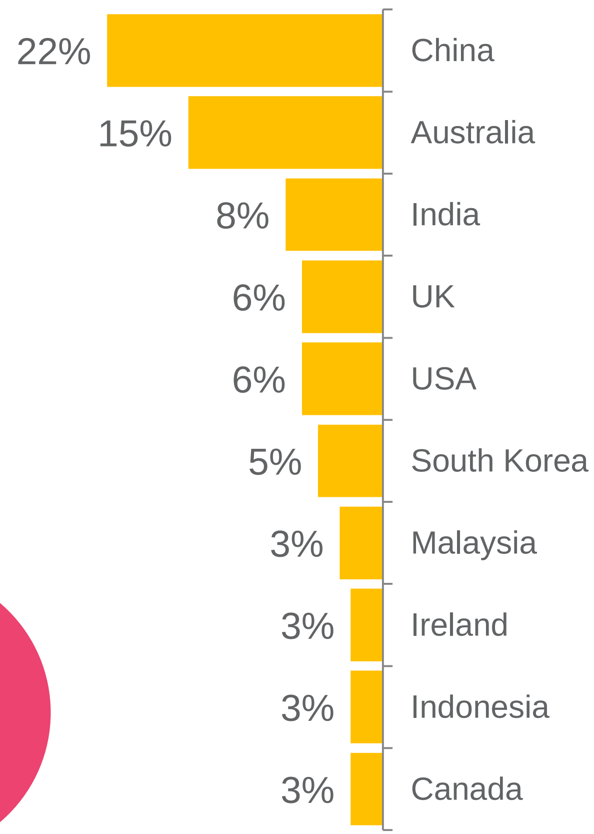
Capsicum Product Launches:
Last 3 Months (November 2015 – January 2016)
Summary

- There were 237 products launched globally in the last three months that contained capsicum as an ingredient.
- There were 36 products launched in Australia, continuing an upwards trend of launches in the country over the last three waves.
- Top countries for launches were China (22%), Australia (15%), India (8%) and UK (6%), with two thirds of products launched in the Asia Pacific region.
- Flexible packs (30%) and trays (11%) were the most used forms of packaging over the last three months.
- Snacks (22%) and meals (22%) were the main launch category for products containing capsicum.
- Product claims used were no additives/preservatives (24%), ease of use (19%), and time/speed (18%).
- The most innovative product was a Menopause Supplement from France (examples of these can be found in the following pages).

Source: Mintel (2016)

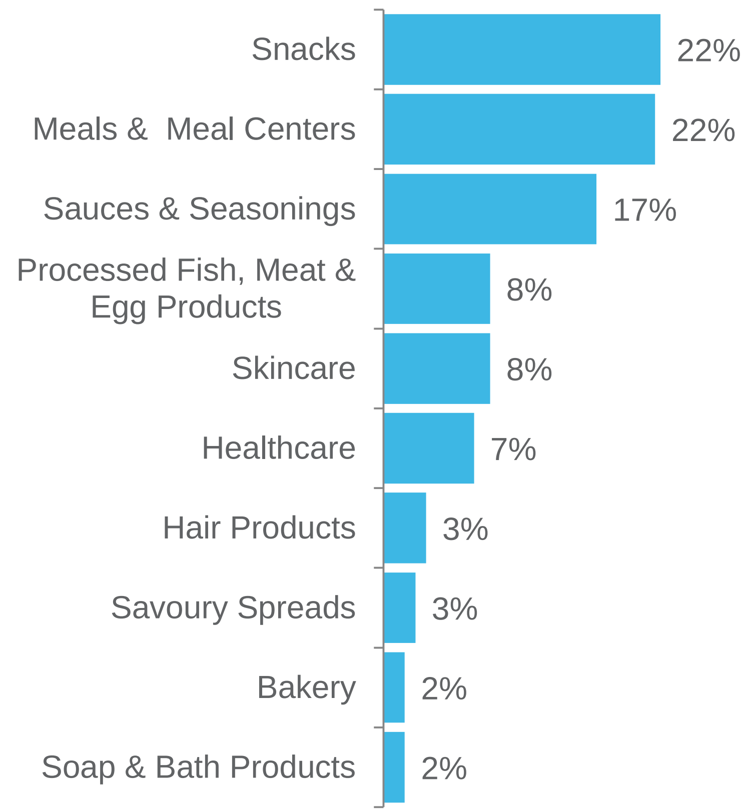
China had the greatest number of capsicum product launches over the last 3 months, consistent with the previous wave. Snacks and meals & meal centers remained the main launch categories this wave.

Top Launch Countries



237 Global Launches

Top Launch Categories



The main claims globally were no additives & preservatives, ease of use, and time/speed.

Flexible packaging and trays are primarily used for capsicum products.

Pack Formats Used

Global	Flexible	30%
	Tray	11%
	Bottle	10%
Asia Pacific	Flexible	38%
	Tub	12%
	Jar	10%
Europe	Tube	16%
	Bottle	15%
	Tray	13%

Top Claims Used

Global	No Additives/Preservatives	24%
	Ease of Use	19%
	Time/Speed	18%
Asia Pacific	No Additives/Preservatives	27%
	Time/Speed	23%
	Ease of Use	23%
Europe	Botanical/Herbal	35%
	No Additives/Preservatives	27%
	Ethical - Environmentally Friendly Package	22%

Only regions with n >30 are displayed

Innovative Capsicum Launches:
L3M (November 2015 – January 2016)

Moondarra Sweet Chilli Cream Cheese (Canada)

Moondarra Sweet Chilli Cream Cheese contains 32% milk fat and 51% moisture. This product retails in a 120g pack.

Claims:
N/A

Ymea Ménopause Flat Stomach Menopause Supplement (France)

The product contains active plant extracts, vitamin B6, D3 and zinc, and is said to help reduce discomforts linked to menopause and perimenopause. The supplement comprises: black cohosh that helps women to endure the symptoms of menopause such as hot flushes, sweats and irritability; zinc that helps maintain normal skin; vitamin B6 that helps regulate hormonal activity; vitamin D3 that helps maintain healthy bones; artichoke that promotes digestion and intestinal comfort; green tea that participates in fat oxidation; cayenne pepper that helps control weight.

Claims:
Other (Functional), Female, Botanical/Herbal, Gluten-Free, Digestive (Functional), Bone Health, Low/No/Reduced Allergen, Low/No/Reduced Lactose, Skin, Nails & Hair (Functional), Slimming

Yueliangjie Food / Moon Street Roasted Meat Flavoured Broad Beans (China)

Yueliangjie Food / Moon Street Kao Rou Wei Lan Hua Dou (Roasted Meat Flavoured Broad Beans) are made using selected broad beans. This product retails in a 30g pack.

Claims:
N/A

Flos-Lek Pharma Arnica Active Cooling Gel (Poland)

Flos-Lek Pharma Arnica Active Zel Chlodzacy (Arnica Active Cooling Gel) is recommended for physically active individuals practising strenuous activities or sports, as well as for elderly people. It contains 14 precious herbal extracts such as peppermint, arnica montana, ginkgo, purple coneflower, Scots pine, juniper, horse chestnut, comfrey, devil's claw, cinnamon tree, black pepper, chili pepper, ginger and rosemary with proven properties that promote blood circulation and regenerate the skin.

Claims:
Other (Functional), Botanical/Herbal, Cardiovascular (Functional), Dermatologically Tested, Time/Speed, Ease of Use, Skin, Nails & Hair (Functional)

Source: Mintel (2016)

Innovative Capsicum Launches:
L3M (November 2015 – January 2016)

Alino Mexican Style Chili Con Carne (Switzerland)

Alino Chili Con Carne Bohnengericht nach Mexikanischer Art (Mexican Style Chili Con Carne) is now available. The microwavable product retails in an 800g pack.

Claims:
Microwaveable

Oscar Mayer Selects Hardwood Smoked Uncured Beef Sausage (USA)

Oscar Mayer Selects Hardwood Smoked Uncured Beef Sausage is not preserved and is free from MSG, fillers, nitrates, nitrites, artificial flavors and artificial preservatives. The USDA certified fully cooked product contains 100% beef, is hardwood smoked, and retails in a 12-oz. pack.

Claims:
No Additives/Preservatives

Dahewei Barbecue Flavoured Potato Snack (China)

Dahewei Shao Kao Wei Shu Tiao (Barbecue Flavoured Potato Snack) has been relaunched with a new package and a new formulation which now provides a better taste. This product retails in a newly designed 62g pack containing 52g potato snack and 10g tomato sauce.

Claims:
N/A

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

First Pride Fully Cooked Hot & Spicy Crispy Golden Fried Chicken is halal certified. The product is fully cooked prior to packaging to prevent cross-contamination by keeping harmful bacteria at bay. It is easy and convenient to prepare, directly from 'freezer to fryer' and is described as the perfect choice for any family on-the-go. The product retails in a 750g pack.

Claims:
Halal, On-the-Go, Ease of Use

Source: Mintel (2016)

Innovative Capsicum Launches:
L3M (November 2015 – January 2016)

Laura Conti Home Spa Warming And Soothing Foot Mask (Poland)

Warming And Soothing Foot Mask, recommended for cold feet, is claimed to provide instant warming effect. The formula contains: red pepper extract, to relax the feet and provide warmth; arnica montana and horse chestnut extracts, to provide an additional caring effect, strengthen and seal fragile blood vessels and reduce swelling; linseed oil and glycerin, to eliminate dryness and roughness, leaving skin noticeably smoother, softer and suppler.

Claims:
Botanical/Herbal, Moisturising / Hydrating, Time/Speed

Freya's Roasted Capsicum & Garlic Wraps (New Zealand)

Freya's Roasted Capsicum & Garlic Wraps have been repackaged. These easy-to-roll wraps are yeast and dairy free and can be heated in the microwave. The product retails in a resealable pack containing six units and featuring the brand's Facebook link.

Claims:
Microwaveable, Low/No/Reduced Allergen, Ease of Use, Convenient Packaging, Social Media

Dani Nyora Red Pepper Pulp (Spain)

Dani Pulpa de Ñora (Nyora Red Pepper Pulp) is new to the range. This gluten-free sterilized product is ideal for the preparation of Murcian and Alicante rice dishes, as well as in stews and sauces, and retails in a 125g pack.

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

Barker's Chunky Salsa Tomato & Capsicum Sauce (New Zealand)

Barker's Chunky Salsa Tomato & Capsicum Sauce is a spicy Mexican style sauce that contains tomato and capsicum, is made on the original family farm, and is said to be perfect with any Mexican dish, or on top of morning poached eggs. The sauce has a mild-medium intensity and retails in a 305g pack.

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

Source: Mintel (2016)

Australian Innovative Capsicum Launches:
L3M (November 2015 – January 2016)

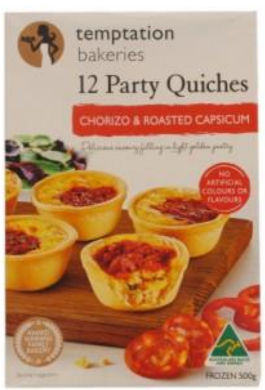
Homestyle Clever Cooks Spaghetti & Meatballs

Edgell Cannellini Bean Salad

Copperpot Classic Grill Me Roasted Capsicum Dip

Remano Stir Me Up Capsicum, Zucchini & Green Olives Stir Through Pasta Sauce

Temptation Bakeries Party Quiches Chorizo & Roasted Capsicum



Wattle Valley Chunky Dips Sweet Chilli Dip with Cashew & Parmesan

Woolworths Delicious Nutritious Michelle Bridge Asian Style Chicken

Coles Roasted Capsicum Chutney

Source: Mintel (2016)

Brussels Sprouts.

Both purchase and consumption frequency remain relatively consistent with the previous wave. On average, consumers purchase Brussels Sprouts 3 times per month, and consume them around 6 times per month.

Woolworths and Coles remained the key locations for purchase.

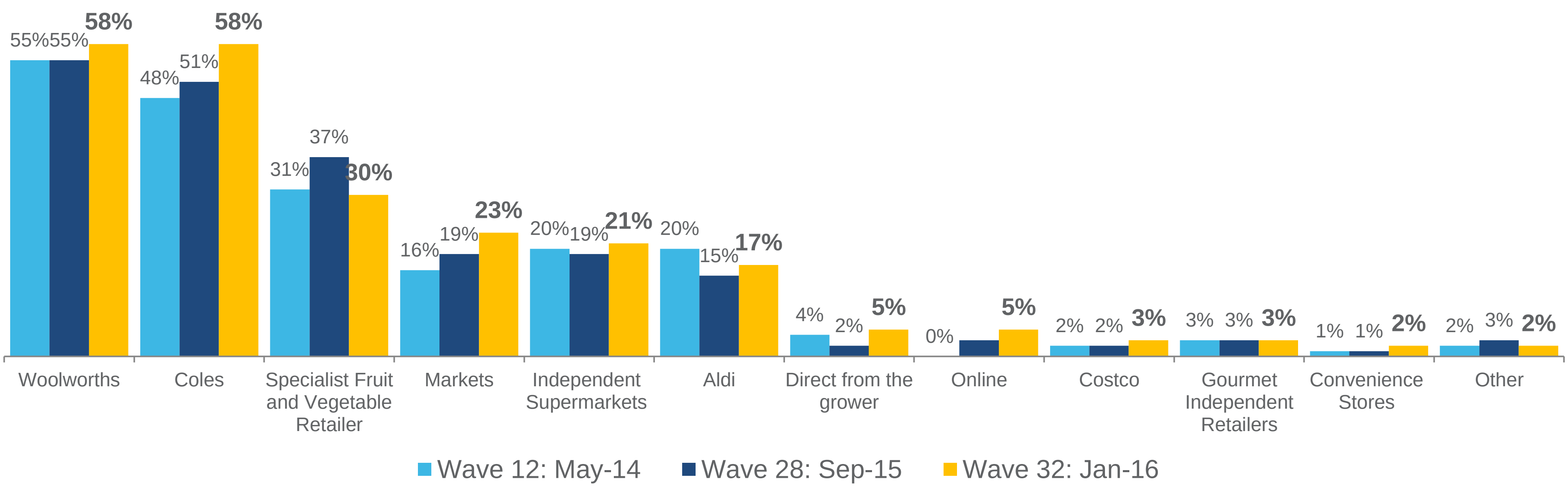
Average Purchase **3.4** times per month

▼ 2.9 times, Wave 12
▼ 3.3 times, Wave 28

Average Consumption **6.1** times per month

▼ 5.5 times, Wave 12
▲ 6.4 times, Wave 28

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 12 N=310, Wave 28 N=268, Wave 32 N=231

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

Average Spend and Price Sensitivity

Average weight of purchase

The average consumer typically purchased **0.7kg** of Brussels Sprouts in January 2016, consistent with the previous wave.

- ▼ 0.6kg, Wave 12
- – 0.7kg, Wave 28

Recalled last spend

The average recalled last spend was **$4.10**. This has slightly increased over the last three waves.

- ▼ $3.70, Wave 12
- ▼ $4.00, Wave 28

Value for money

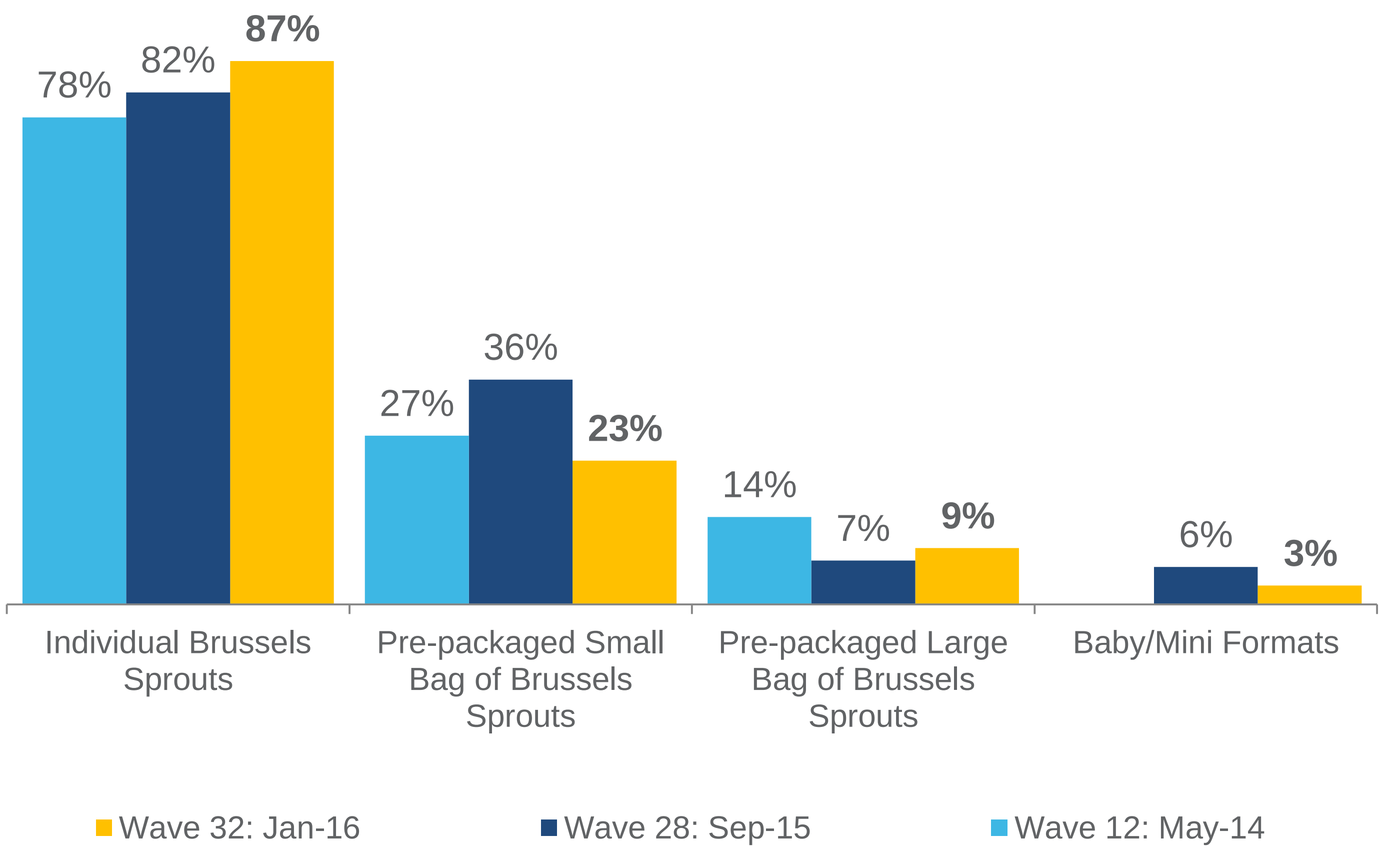
On average, consumers still perceived Brussels Sprouts to be good value for money **(6.1/10)**, returning to levels found in Wave 12.

- – 6.1/10, Wave 12
- ▲ 6.4/10, Wave 28

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 12 N=310, Wave 28 N=268, Wave 32 N=231

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

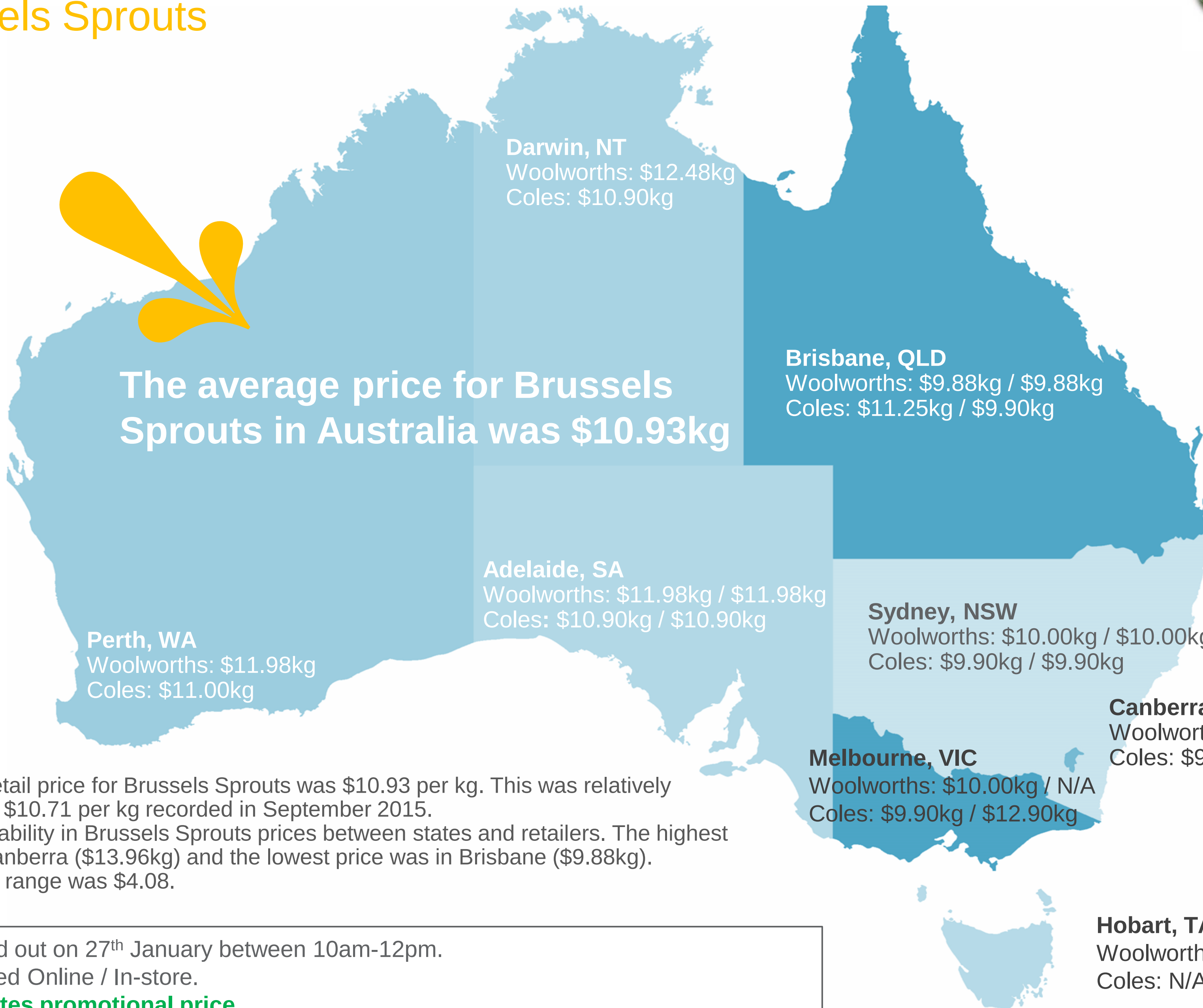
Individual Brussels Sprouts were the main format purchased, consistent with previous waves. The current wave saw a decline in the popularity of pre-packaged Brussels Sprouts in small formats.



Q4b. In what fresh formats do you typically purchase Brussels Sprouts?
Sample Wave 12 N=310, Wave 28 N=268, Wave 32 N=231

Online and In-store Commodity Prices

Brussels Sprouts



- The average retail price for Brussels Sprouts was $10.93 per kg. This was relatively consistent with $10.71 per kg recorded in September 2015.
- There was variability in Brussels Sprouts prices between states and retailers. The highest price was in Canberra ($13.96kg) and the lowest price was in Brisbane ($9.88kg).
- The retail price range was $4.08.

Pricing was carried out on 27th January between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates promotional price.

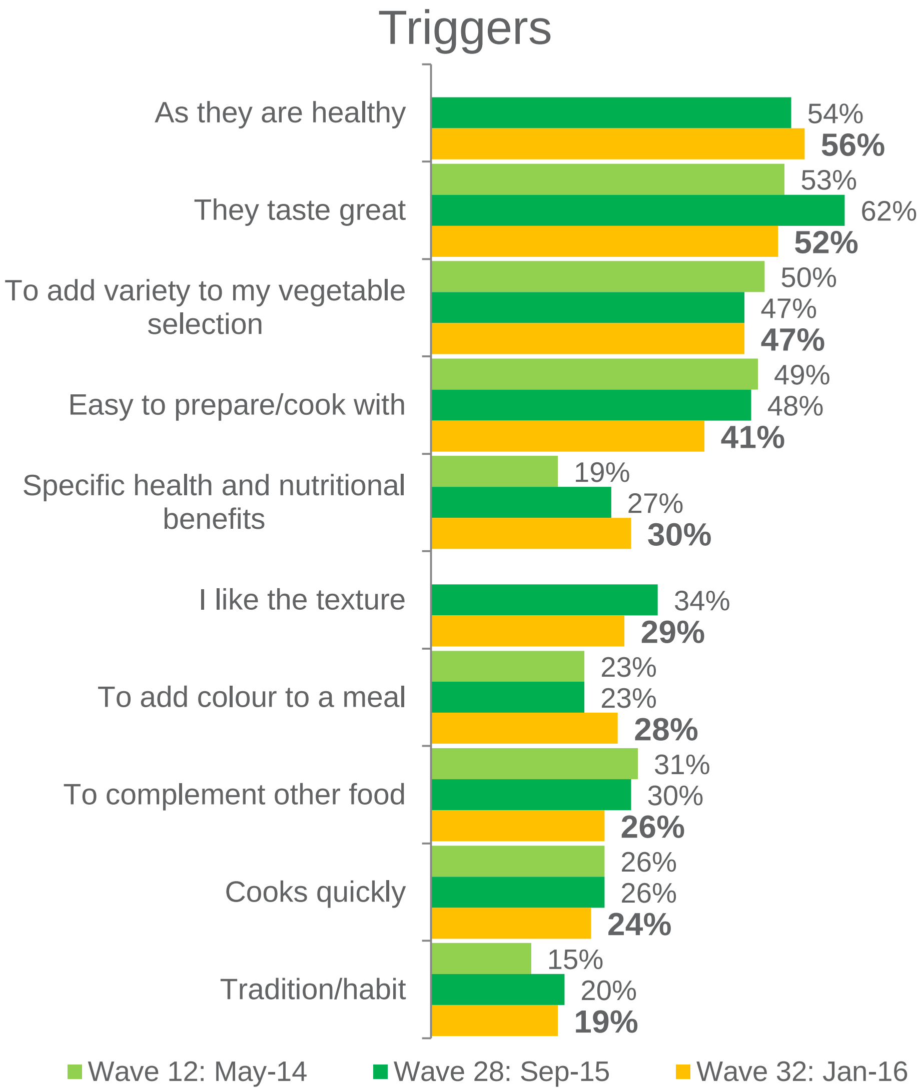
Spontaneous Awareness & Purchase

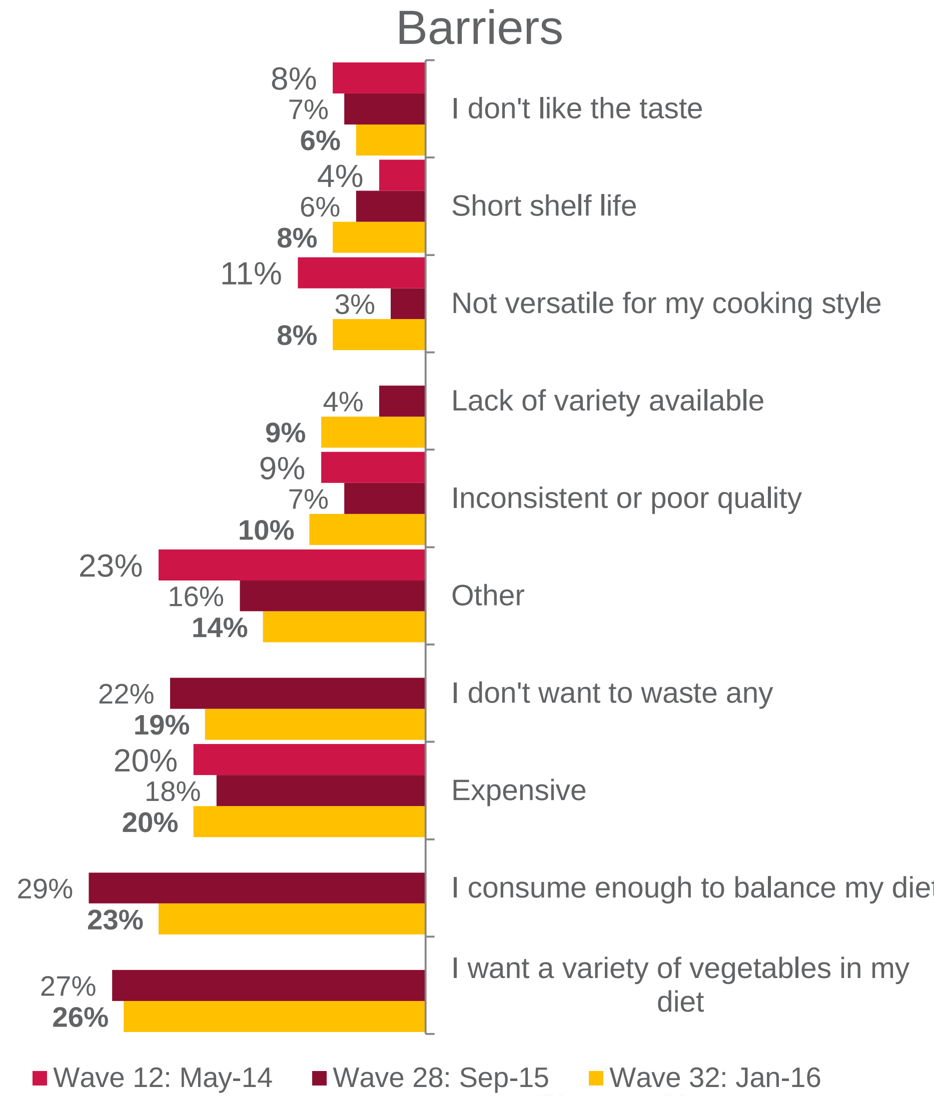
80% of consumers could not recall any type of Brussels Sprouts.

Those that mentioned a type of Brussels sprouts recalled green.

Q6a. What varieties of <commodity> are you aware of? (unprompted)
Sample Wave 12 N=310, Wave 28 N=268, Wave 32 N=231

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





Q7. Which of the following reasons best describes why you purchase <commodity> ?
Q8. Which reason best describes why you don't buy <commodity> more often?
Sample Wave 12 N=310, Wave 28 N=268, Wave 32 N=231

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

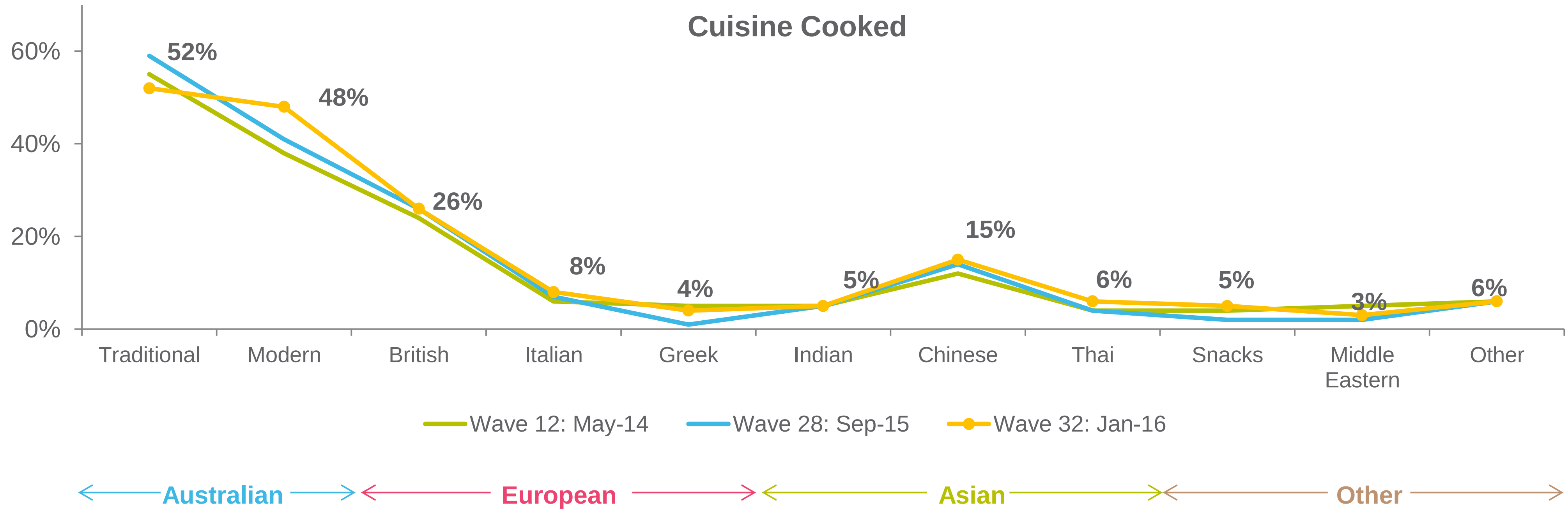
Traditional Australian cuisine was the most common cooking style, with an increase in Modern Australian this wave. Cuisine choice has remained consistent across previous waves.

Top 5 Consumption Occasions

	Wave 28	Wave 31
Dinner	70%	**66%**
Family Meals	57%	**57%**
Weekday Meals	41%	**43%**
Weekend Meals	31%	**33%**
Quick Meals	23%	**26%**

10% used Brussels Sprouts when cooking a new recipe

▼ 7%, Wave 28



Q10. What cuisines do you cook/consume that use <commodity> ?
Q11. Which of the following occasions do you typically consume/use <commodity> ?
Sample Wave 12 N=310, Wave 28 N=268, Wave 32 N=231

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

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

Accompanying Vegetables

Potato	62%
Carrot	61%
Pumpkin	36%
Sweet Potato	35%
Cauliflower	32%

Top 10 Cooking Styles		
	Wave 28	Wave 32
Steaming	60%	**58%**
Boiling	42%	**42%**
Stir frying	23%	**21%**
Microwave	18%	**19%**
Sautéing	15%	**16%**
Roasting	16%	**15%**
Frying	12%	**13%**
Slow Cooking	10%	**10%**
Baking	9%	**10%**
Soup	7%	**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 12 N=310, Wave 28 N=268, Wave 32 N=231

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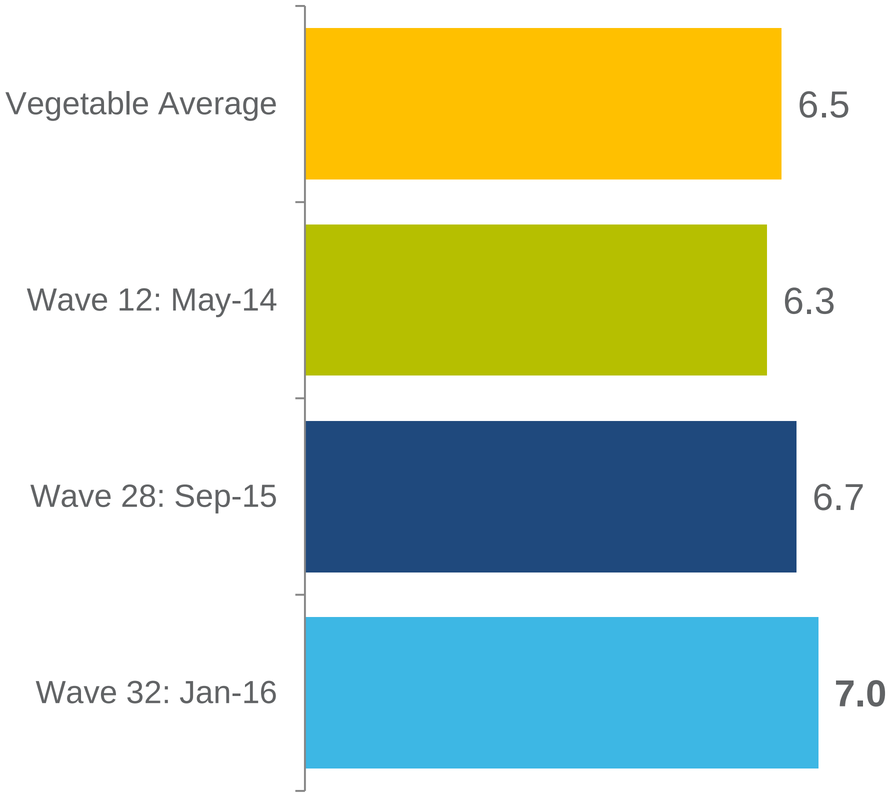
colmar brunton.

Importance of provenance has continued to increase this wave. Consumers find it is very important to know that Brussels Sprouts are grown in Australia.



Q14. When purchasing <commodity>, how important is Provenance to you?
Mean scores out of 10.
Sample Wave 12 N=310, Wave 28 N=268, Wave 32 N=231

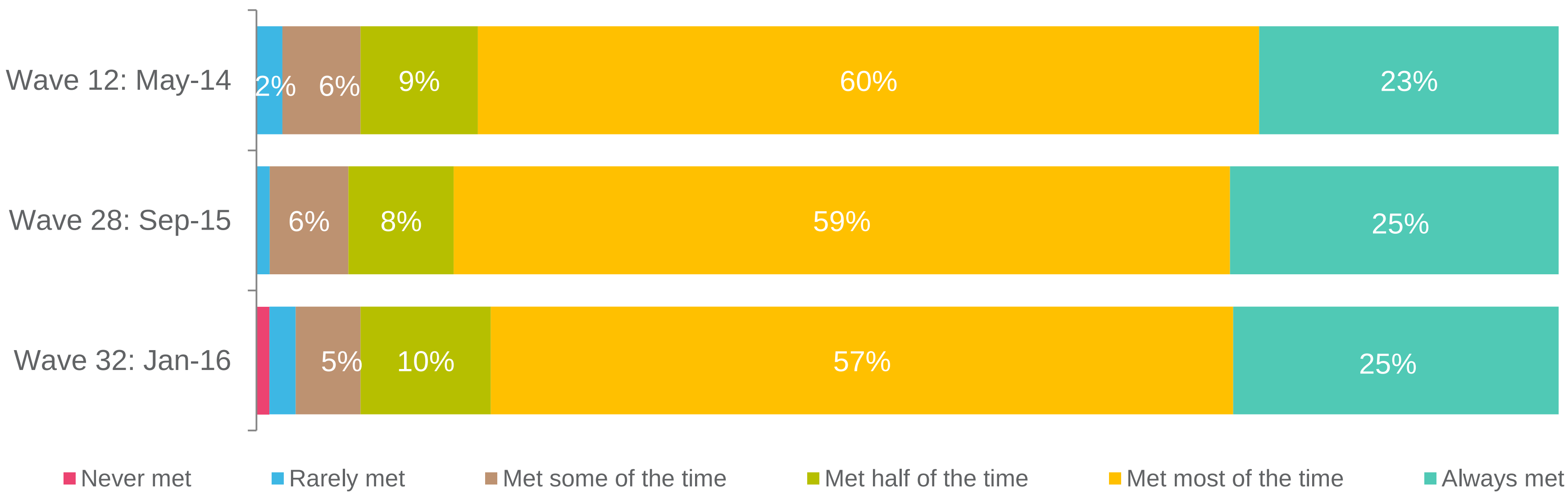
Consistent with the previous wave, consumers expect Brussels Sprouts to stay fresh for over eight days once purchased, with these expectations being met most of the time.

Expected to stay fresh for **8.8** days

▼ 8.6 days, Wave 12

▬ 8.8 days, Wave 28

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 12 N=310, Wave 28 N=268, Wave 32 N=231

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

Trends:
Brussels Sprouts

*Due to low number of launches only Product slide/s will be shown.

Innovative Brussels Sprouts Launches:

L3M (November 2015 – January 2016)

Wegmans Food You Feel Good About Special Blends Tangy Lemon Kale Chopped Salad Kit (USA)

Wegmans Food You Feel Good About Special Blends Tangy Lemon Kale Chopped Salad Kit includes Brussels sprouts, kale, radicchio, seasoned focaccia croutons, Italian cheese blend and Wegmans lemon vinaigrette dressing. This salad is clean and ready to eat, contains no artificial colors, flavors or preservatives, and retails in a pack containing 6.5-oz. salad and toppings, and 2.38-fl. oz. dressing.

Claims:
No Additives/Preservatives, Ease of Use

Ella's Kitchen Jingle Belly Christmas Dinner Baby Food (UK)

Ella's Kitchen Jingle Belly Christmas Dinner Baby Food is a 100% organic turkey, potatoes and vegetable dinner that is said to contain all the trimmings, without a lumpy texture. Suitable for babies from seven months old, this perfectly balanced meal contains nothing artificial and no added sugar or salt. The product retails in a 130g pack featuring the EU Green Leaf logo. According to the manufacturer, 30p of every sold product goes to Save the Children to help children in the UK.

Claims:
All Natural Product, Low/No/Reduced Sugar, Organic, Low/No/Reduced Sodium, Babies & Toddlers (0-4), Seasonal, Ethical - Charity

Ocean Mist Farms Quick Cook Sprout Halves (USA)

Ocean Mist Farms Quick Cook Sprout Halves are Brussels Sprouts have been repacksed in a 16-oz. pack. The sprouts are halved for faster and even cooking. These ready to serve fresh veggies require simply seasoning and steaming and can be microwaved in the bag. The product is said to be great for grilling, roasting, steaming and much more. It is vegan certified and provides an excellent source of vitamin C, is rich in antioxidants, a good source of fiber and contains no artificial ingredients, preservatives, gluten and GMO's.

Claims:
No Additives/Preservatives, All Natural Product, High/Added Fiber, Microwaveable, Gluten-Free, Antioxidant, Low/No/Reduced Allergen, Vegan, Time/Speed, Ease of Use, Convenient Packaging, No Animal Ingredients, GMO-Free

M&S British Pork, Sprout & Bacon Bangers (Ireland)

M&S British Pork, Sprout & Bacon Bangers comprise pork sausage with Brussels sprouts and smoked bacon. The gluten-free product is ready to cook and suitable for home freezing. It retails a 454g pack.

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

Source: Mintel (2015)

Spinach.

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

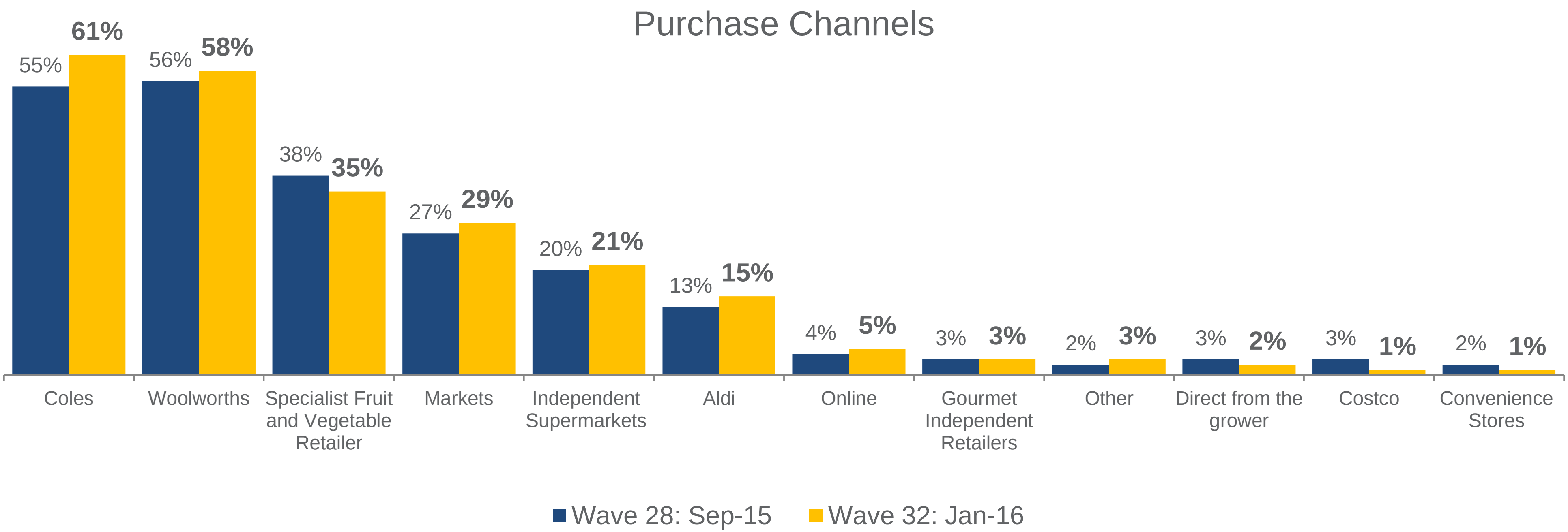
Spinach is predominantly purchased through mainstream retailers. Specialist retailers and markets are also popular channels.

Average Purchase **4.6** times per month

▲ 5.2 times, Wave 28

Average Consumption **11.1** times per month

▼ 10.6 times, Wave 28



Q1. On average, how often do you purchase Spinach (English and baby)?
Q2. On average, how often do you consume Spinach (English and baby)?
Q5. From which of the following channels do you typically purchase Spinach (English and baby)?
Sample Wave 28 N=308, Wave 32 N=305

▼: 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 **0.5kg** of spinach, consistent with the previous wave.

— 0.5kg, Wave 28

Recalled last spend

Recalled last spend on spinach is **$3.60**, slightly lower than the price recorded in Wave 28.

▲ $3.80, Wave 28

Value for money

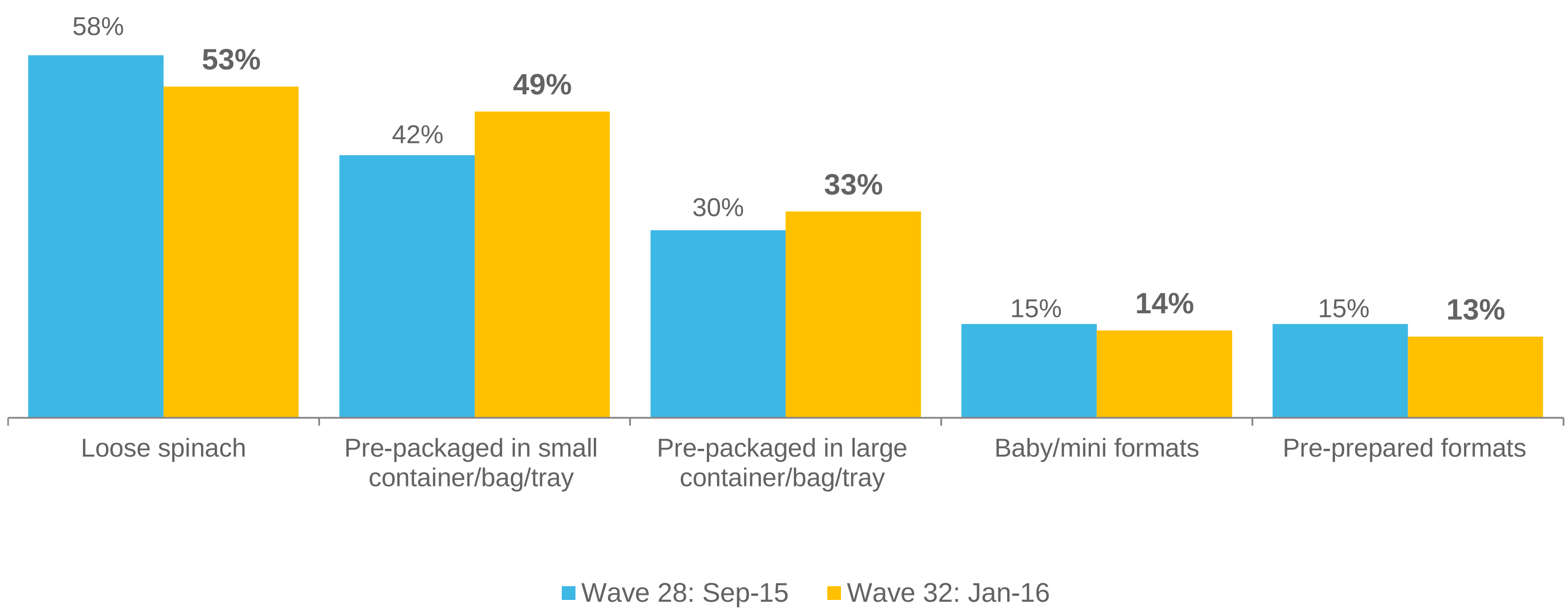
Consumers perceive spinach to be good value for money (**6.2/10**), relatively consistent with the past wave.

▲ 6.4/10, Wave 28

Q3. How much Spinach do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 28 N=308, Wave 32 N=305

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

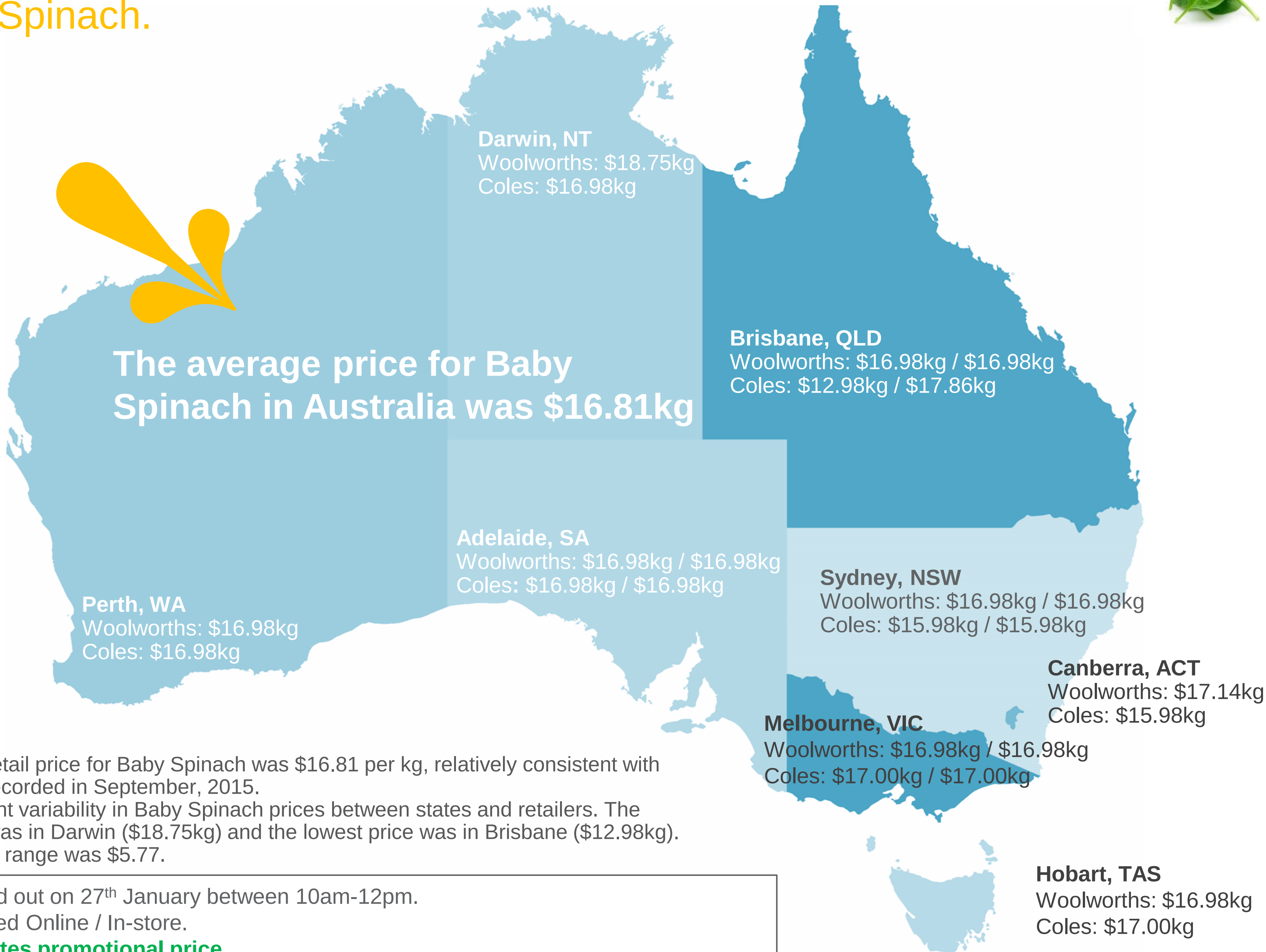
Loose spinach and pre-packaged small bags are the most common purchase formats. Other options which are purchased include various pre-packaged and pre-prepared formats.



Q4b. In what fresh formats do you typically purchase Spinach (English and baby)?
Sample Wave 28 N=308, Wave 32 N=305

Online and In-store Commodity Prices

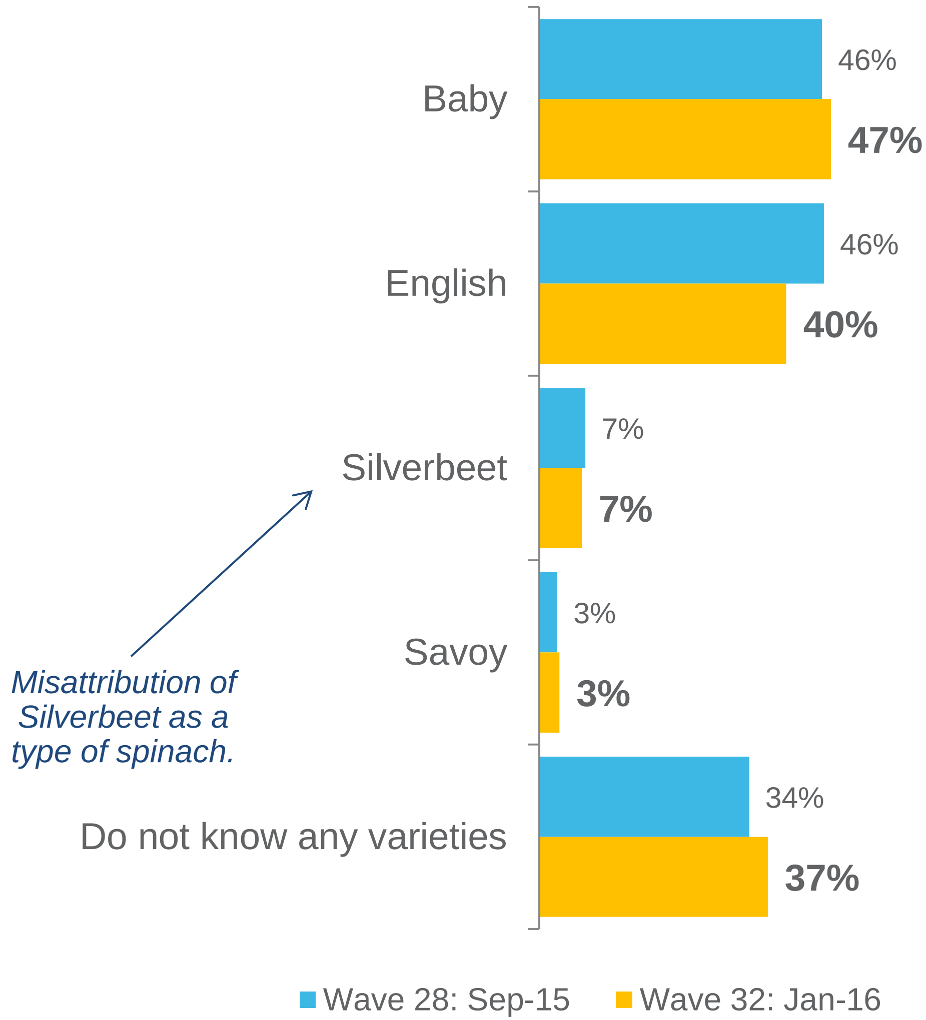
Baby Spinach.



- The average retail price for Baby Spinach was $16.81 per kg, relatively consistent with 16.56 per kg recorded in September, 2015.
- There was slight variability in Baby Spinach prices between states and retailers. The highest price was in Darwin ($18.75kg) and the lowest price was in Brisbane ($12.98kg).
- The retail price range was $5.77.

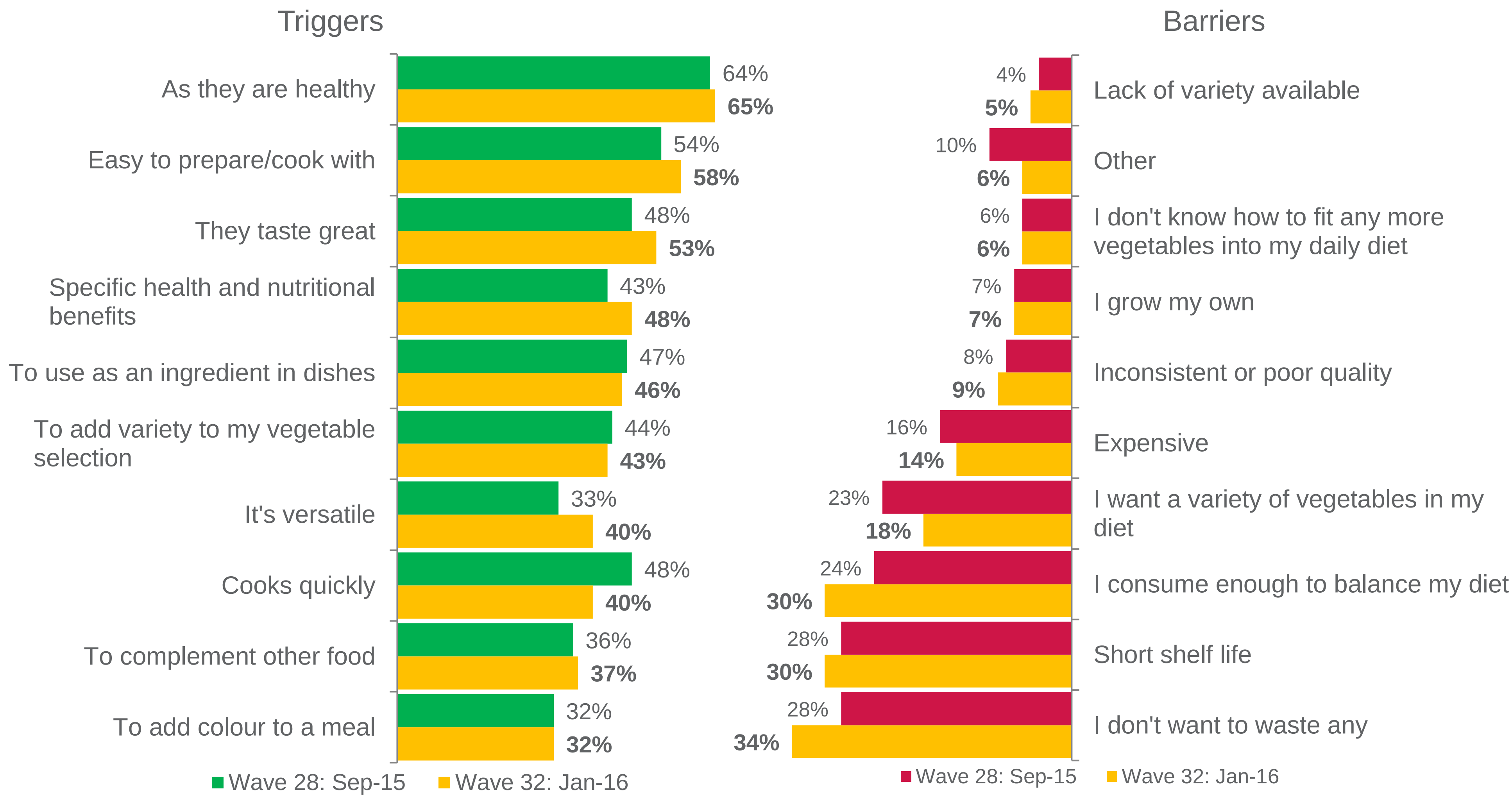
Pricing was carried out on 27th January between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates promotional price.

Baby and English are the most recalled types of spinach. While more than a third of respondents could not recall a type, 7% perceived that silverbeet was a type of spinach.



Q6a. What varieties of Spinach are you aware of? (unprompted)
Sample Wave 28 N=308, Wave 32 N=305

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



Q7. Which of the following reasons best describes why you purchase Spinach (English and baby)?
Q8. Which reason best describes why you don't buy Spinach (English and baby) more often?
Sample Wave 28 N=308, Wave 32 N=305

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

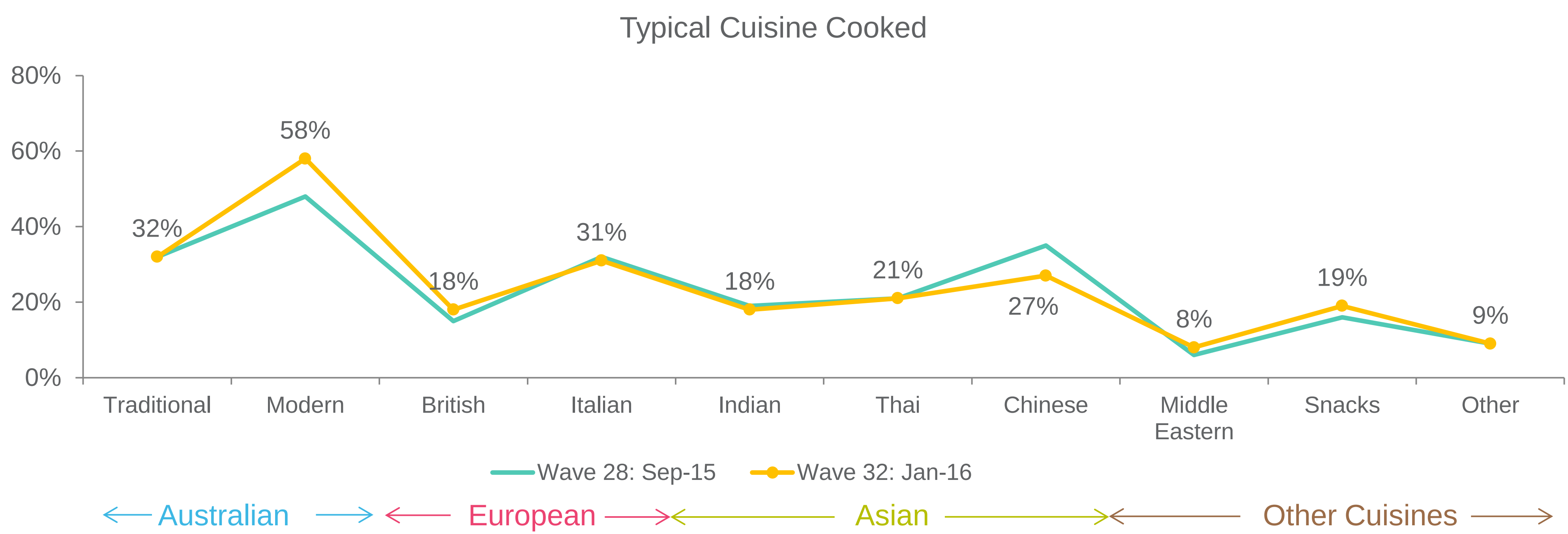
Consistent with the past wave, meal occasions tend to occur during dinner. Approximately one fifth of consumers used spinach when cooking a new recipe.

Top 5 Consumption Occasions

	Wave 28	Wave 32
Dinner	69%	**71%**
Quick Meals	52%	**57%**
Family Meals	55%	**54%**
Weekday Meals	43%	**52%**
Lunch	47%	**50%**

19% used spinach when cooking a new recipe

▲ 20%, Wave 28



Q10. What cuisines do you cook/consume that use Spinach (English and baby)?
Q11. Which of the following occasions do you typically consume/use Spinach (English and baby)?
Sample Wave 28 N=308, Wave 32 N=305

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

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

Accompanying Vegetables

Vegetable	%
Tomato	52% ▲
Carrot	45% ▲
Onion	43% ▲
Capsicum	40% ▲
Garlic	31% –

Top 10 Cooking Styles		
	Wave 28	Wave 32
Raw	47%	**57%**
Stir frying	54%	**51%**
Steaming	32%	**36%**
Sautéing	30%	**27%**
Boiling	13%	**16%**
Soup	18%	**16%**
Frying	14%	**12%**
Baking	12%	**12%**
Slow Cooking	8%	**8%**
Other	6%	**8%**

Q9. How do you typically cook Spinach (English and baby)?
Q10a. And when are you serving Spinach (English and baby) which of the following do you also serve together with this?
Sample Wave 28 N=308, Wave 32 N=305

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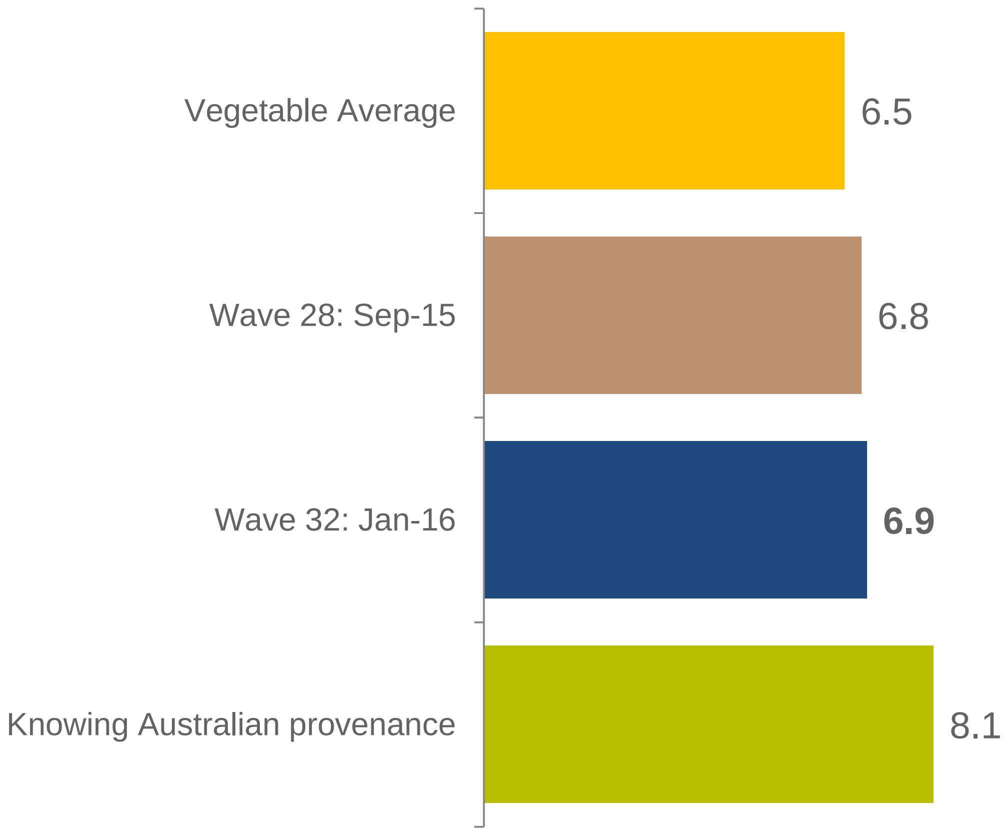
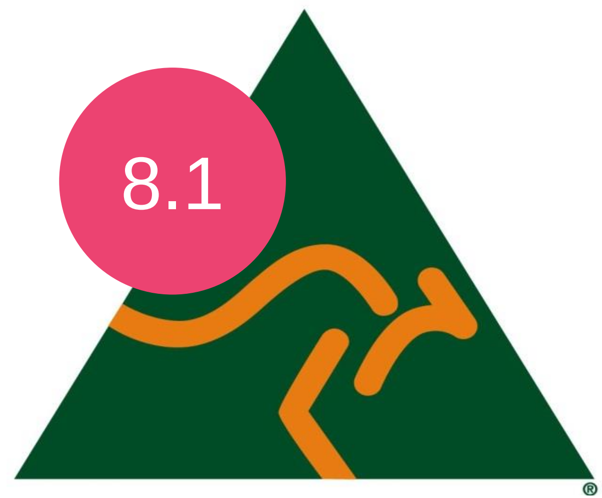
Importance of provenance has slightly increased this wave. Knowing that spinach is grown in Australia remains the most important provenance information for consumers.



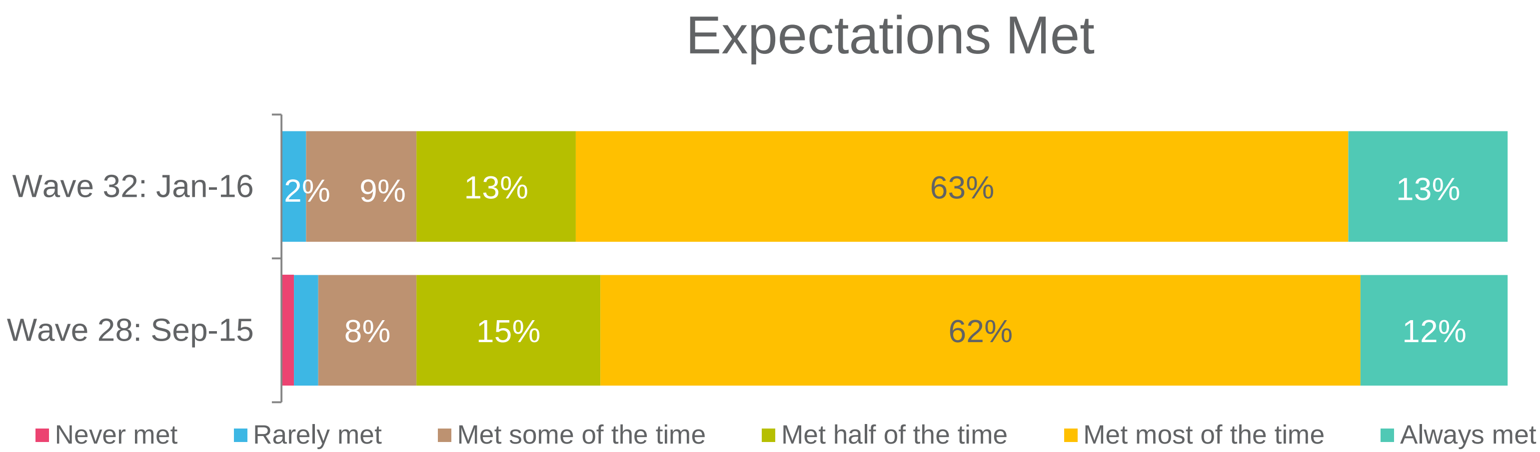


Q14. When purchasing Spinach (English and baby), how important is Provenance to you?
Q15. And when purchasing Spinach (English and baby), how important is that it is grown in Australia?
Sample Wave 28 N=308, Wave 32 N=305

Consistent with the previous wave, consumers expect spinach to remain fresh for just under a week once purchased, which is being met most of the time.

Expected to stay fresh for **6.0** days

6.0 times, Wave 28



Q12. How long do you expect Spinach (English and baby) to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy Spinach (English and baby)?
Sample Wave 28 N=308, Wave 32 N=305

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

Spinach Product Launch Trends.

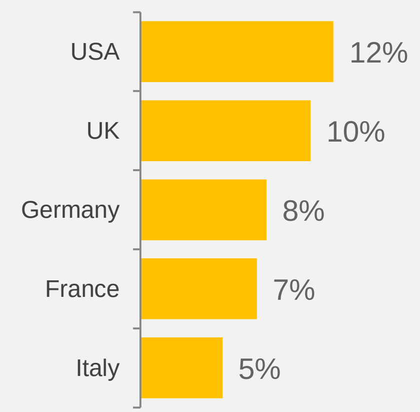
Spinach Global Launches

November 2015 – January 2016

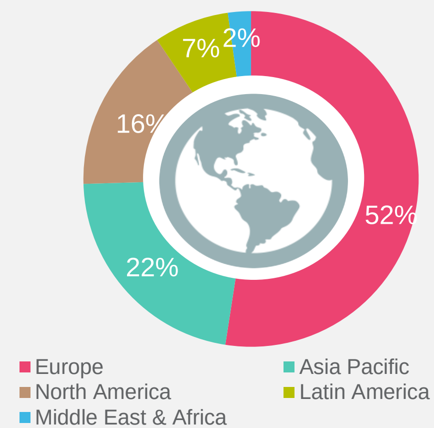
There were 856 spinach products launched globally over the last three months. The majority of launches were in USA and the UK. Categories for launches were meals and side dishes. Key packaging for spinach products were flexible packaging and trays.

856 Global NPDs

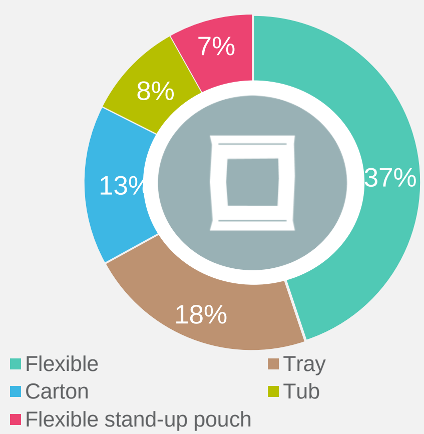
Country



Region



Top Pack Formats



Categories

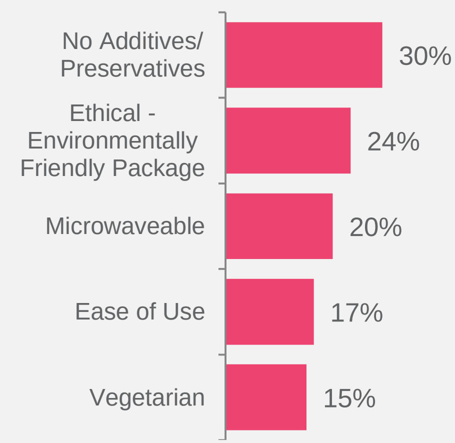
Meals 24%

Side Dishes 16%

Snacks 10%

Soup 7%

Top Claims



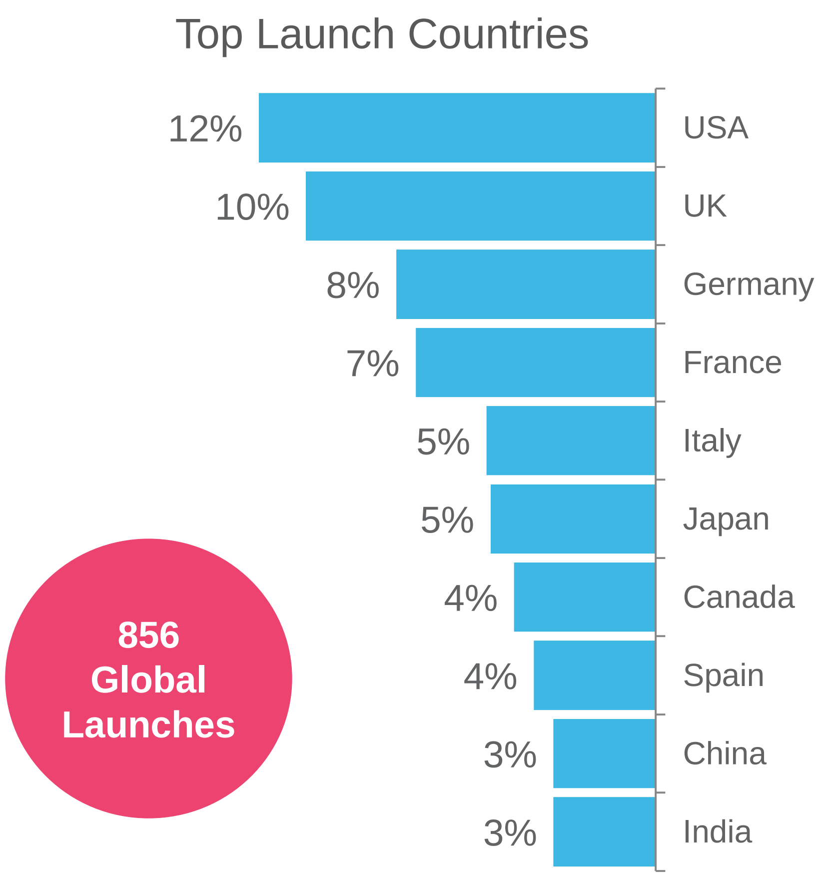
Spinach Product Launches:
Last 3 Months (November 2015 – January 2016)
Summary

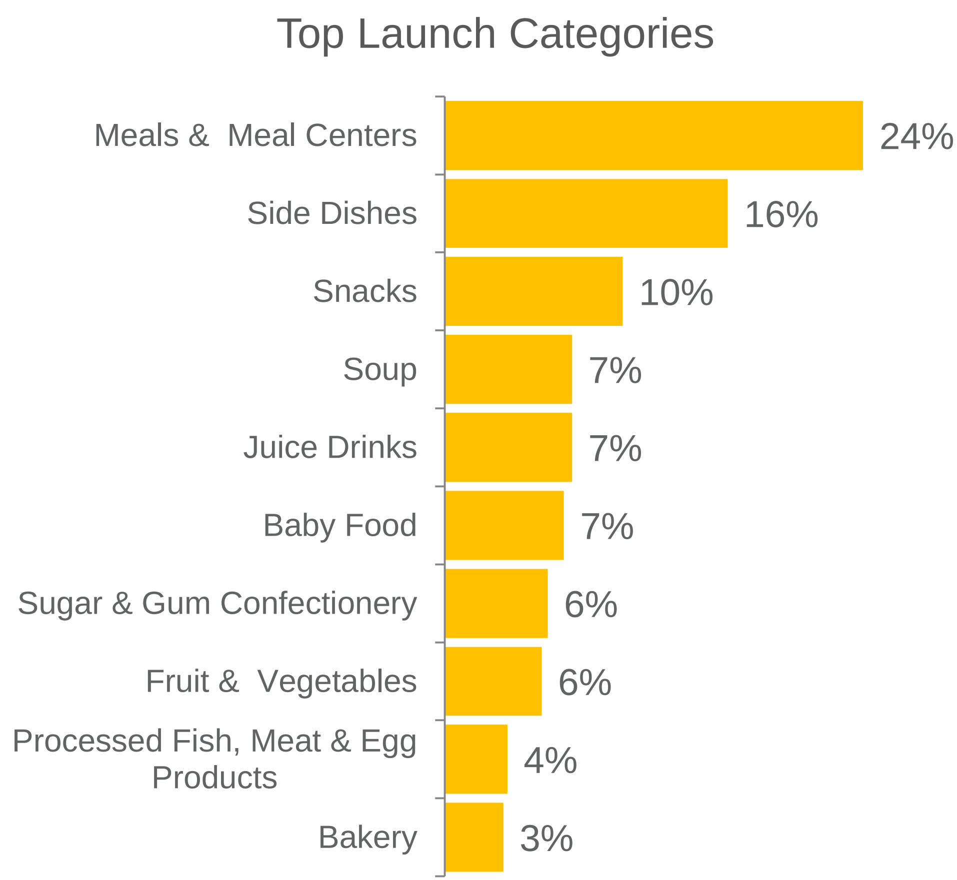
- There were 856 launches in the past 3 months globally that contained spinach as an ingredient.
- There were 19 products launched in Australia over the past three months.
- Europe (52%) and Asia Pacific (22%) were the key regions for launches.
- Flexible packaging (37%) and trays (18%) were the most common formats utilised.
- The main categories for launches were meals (24%), side dishes (16%), juice, snacks (10%) and soups (7%).
- Most popular claims on products included no additives/preservatives (30%) and ethical & environmentally friendly packaging (24%).
- The most innovative product launched was Spinach & Beetroot Baked Nacho Chips from India. Examples of these can be found in the following pages.

Source: Mintel (2016)

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

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





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

Flexible packaging and trays are primarily used for spinach products.

Pack Formats Used

Region	Pack Format	%
Global	Flexible	37%
Global	Tray	18%
Global	Carton	13%
Europe	Flexible	34%
Europe	Tray	25%
Europe	Carton	15%
Asia Pacific	Flexible	43%
Asia Pacific	Carton	14%
Asia Pacific	Flexible Stand-Up Pouch	10%

Top Claims Used

Region	Claim	%
Global	No Additives/Preservatives	30%
Global	Ethical - Environmentally Friendly Package	24%
Global	Microwaveable	20%
Europe	Ethical - Environmentally Friendly Package	27%
Europe	No Additives/Preservatives	26%
Europe	Microwaveable	22%
Asia Pacific	No Additives/Preservatives	37%
Asia Pacific	Vegetarian	17%
Asia Pacific	Ease of Use	16%

Only regions with n >30 are displayed

Innovative Spinach Launches:
L3M (November 2015 – January 2016)

Elevate Eat Clean-Feel Great Organic Nutty Cranberry Superfood Salad (USA)

Elevate Eat Clean-Feel Great Organic Nutty Cranberry Superfood Salad comprises organic spring mix, cranberries, creamy feta cheese, walnuts and almonds with a raspberry vinaigrette dressing. The USDA organic certified salad contains 7g of protein, 580mg omega-3 fatty acids, and 2800mg omega-6 fatty acids. It is an excellent source of antioxidant vitamin E. This vegetarian suitable product is free from GMO's and gluten, and retails in a 4.5-oz recyclable pack bearing the FSC logo.

Claims:
Organic, Vegetarian, Gluten-Free, Antioxidant, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Package, GMO-Free

Eldorado Italian Tortelloni with Ricotta and Spinach (Sweden)

Eldorado Italiensk Tortelloni med Ricotta och Spenat (Italian Tortelloni with Ricotta and Spinach) has been repackaged and is now available in a newly designed 500g pack. The product has a cooking time of four minutes.

Claims:
N/A

Bitsy's Brainfood Fruit & Veggie 1, 2, 3 Organic Cereal (USA)

Bitsy's Brainfood Fruit & Veggie 1, 2, 3 Organic Cereal is an organic fruit flavored wholegrain and vegetable cereal that contains nutrients that can help support healthy brain development. The cereal provides 12 essential vitamins and minerals including : zinc which helps brain and body cells develop and grow; iron which helps deliver oxygen to the brain and body; choline which helps the brain send messages; and vitamin B12 which helps support proper functioning of the brain and nervous system.

Claims:
Other (Functional), Kosher, Organic, Children (5-12), Gluten-Free, Wholegrain, Brain & Nervous System (Functional), Low/No/Reduced Allergen, Vegan, No Animal Ingredients, GMO-Free

Vici Gyoza Dumplings with Spicy Vegetables (Germany)

Vici Gyoza Teigtaschen mit Scharfer Gemüsefüllung (Gyoza Dumplings with Spicy Vegetables) are suitable for vegans. This pre-cooked and deep frozen product is suitable for microwaving and retails in a 400g pack, which features the V-Label seal from the European Vegetarian Union.

Claims:
Microwaveable, Vegetarian, Vegan, No Animal Ingredients

Source: Mintel (2016)

Innovative Spinach Launches:
L3M (November 2015 – January 2016)

Wegmans Organic Thin Crust Spinach & Feta Pizza (USA)

Wegmans Organic Thin Crust Spinach & Feta Pizza is now available. The USDA organic certified pizza features a hearth-baked crust topped with tomato sauce, feta and mozzarella cheeses, and spinach. The product contains no artificial colors, flavors or preservatives, and retails in a 13.9-oz. pack.

Claims:
No Additives/Preservatives, Organic

Renaissance Food Group Spinach & Mushroom Omelette Starter (USA)

Renaissance Food Group Spinach & Mushroom Omelette Starter is now available. The product retails in a 7.5-oz. pack.

Claims:
N/A

Dr. Praeger's Super Greens Veggie Burgers (USA)

Dr. Praeger's Super Greens Veggie Burgers are made with teff and hemp. The all-natural burgers are packed with collar greens, kale, Swiss chard, quinoa and a little heat. Each vegan burger contains 100 calories and is free from gluten and GMO. This kosher certified product is suitable for microwave, and retail in a 10-oz. recyclable pack containing four individually wrapped units. The pack also features Facebook, Twitter, Instagram, Pinterest logos.

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

Ledo Premium Line Gnocchi with Spinach (Croatia)

Ledo Premium Line Njoki sa Spinatom (Gnocchi with Spinach) are now available. This quick frozen product is made with chopped spinach, and retails in a 500g pack.

Claims:
Premium

Source: Mintel (2016)

Innovative Spinach Launches:
L3M (November 2015 – January 2016)

Diplom-Is Favoritter fra Isbaren Chocolate & Pistachio Ice Cream (Norway)

Diplom-Is Favoritter fra Isbaren Sjoko-Pistasjis (Chocolate & Pistachio Ice Cream) has been relaunched, previously sold as Yndlingsis. The product comprises pistachio and chocolate ice cream with pistachio sauce and chocolate pieces, and it retails in a 1.5L pack.

Claims:
N/A

SpinErb Vegetable Mix for Cooking (Italy)

SpinErb Mix da Cuocere (Vegetable Mix for Cooking) has been relaunched under a new brand name. The product is washed and ready to cook. It retails in a 0.500kg pack.

Claims:
Ease of Use

Foodhall Spinach & Beetroot Baked Nacho Chips (India)

Foodhall Spinach & Beetroot Baked Nacho Chips are now available. The vegetarian product is said to be nice and indulgent without the guilt and can be enjoyed as it is or with a dip of choice.

Claims:
Vegetarian

Boots Delicious Egg & Spinach (UK)

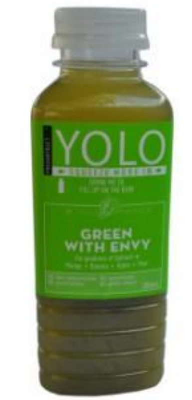
Boots Delicious Egg & Spinach is now available. This product contains a free-range hard boiled egg on a bed of fresh shredded spinach and is suitable for vegetarians. It is suitable as a snack and retails in an 88g partially recyclable pack.

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

Australian Spinach Launches:
L3M (November 2015 – January 2016)

Simmone Logue Fine Food Vegetarian Frittata

Preshafruit Yolo Green with Envy Cold Pressed Juice



Temptation Bakeries Petite Quiches with Cheese & Spinach

Black Swan Crafted Baby Spinach & Fetta Dip

ABC Pastry Shanghai Chinese Spinach with Bamboo & Pork Dumplings

Chicken Tonight Thai Style Curry Cooking Sauce

Source: Mintel (2016)

Parsnip.

On average, parsnips are purchased three times per month, and are consumed around five times a month. This has increased upon the previous wave.

There has been a noticeable increase in Coles being the main purchase channel for parsnips.

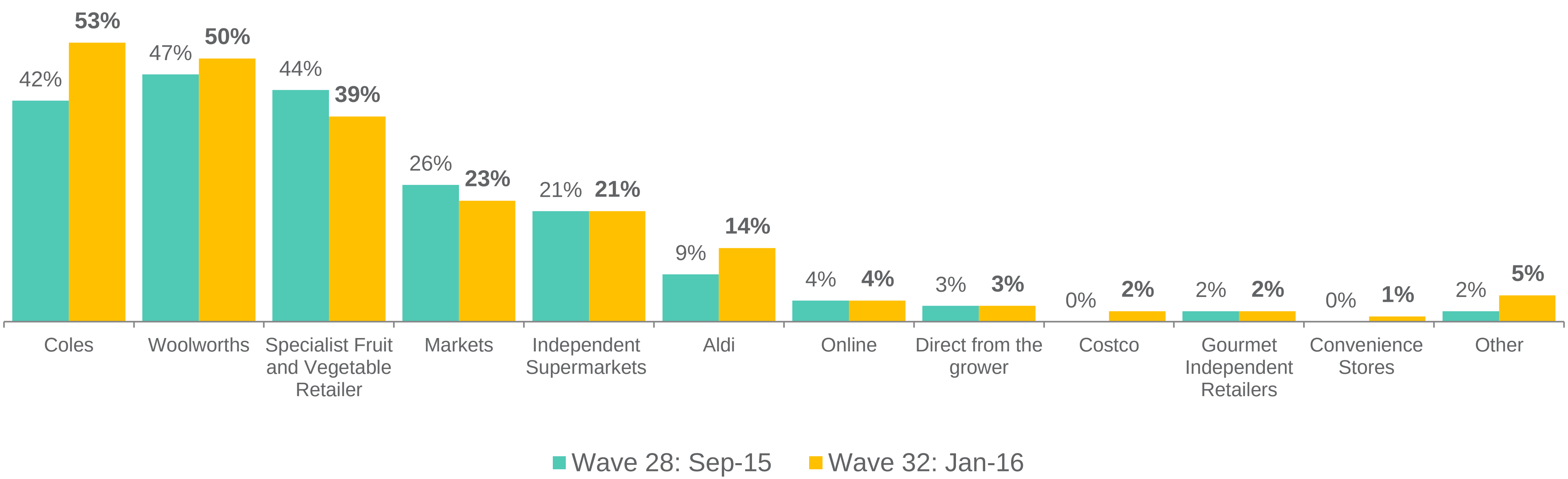
Average Purchase **3.2** times per month

▼ 2.4 times, Wave 28

Average Consumption **5.2** times per month

▼ 4.5 times, Wave 28

Purchase Channels



Q1. On average, how often do you purchase Parsnips?
Q2. On average, how often do you consume Parsnips?
Q5. From which of the following channels do you typically purchase Parsnips?
Sample Wave 28 N=206, Wave 32 N=206

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 parsnip, increasing from the last wave.

▼ 700g, Wave 28

Recalled last spend

Recalled last spend on parsnips was **$4.50**, which is $0.80 higher than the previous wave.

▼ $3.70, Wave 28

Value for money

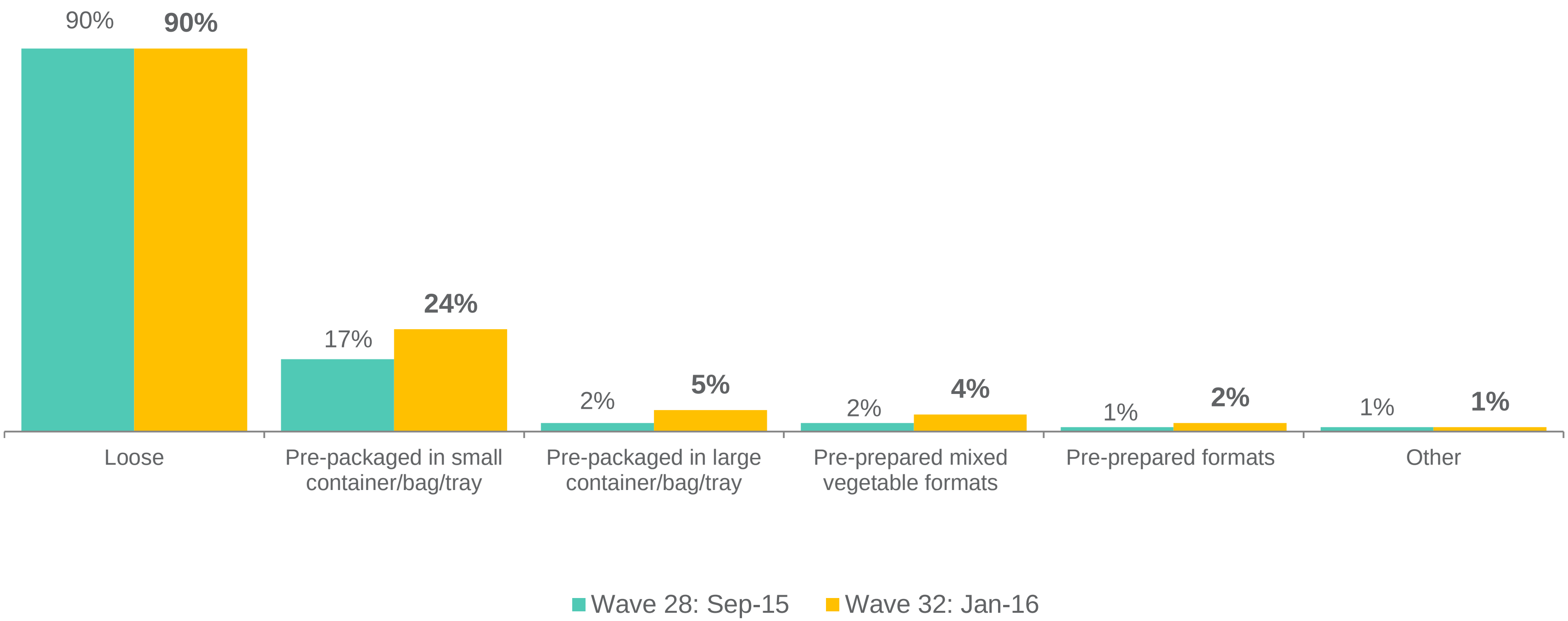
Consumers' perceived value for money is fair for parsnips **(5.6/10)**, consistent with the previous wave.

— 5.6/10, Wave 28

Q3. How much Parsnip do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 28 N=206, Wave 32 N=206

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

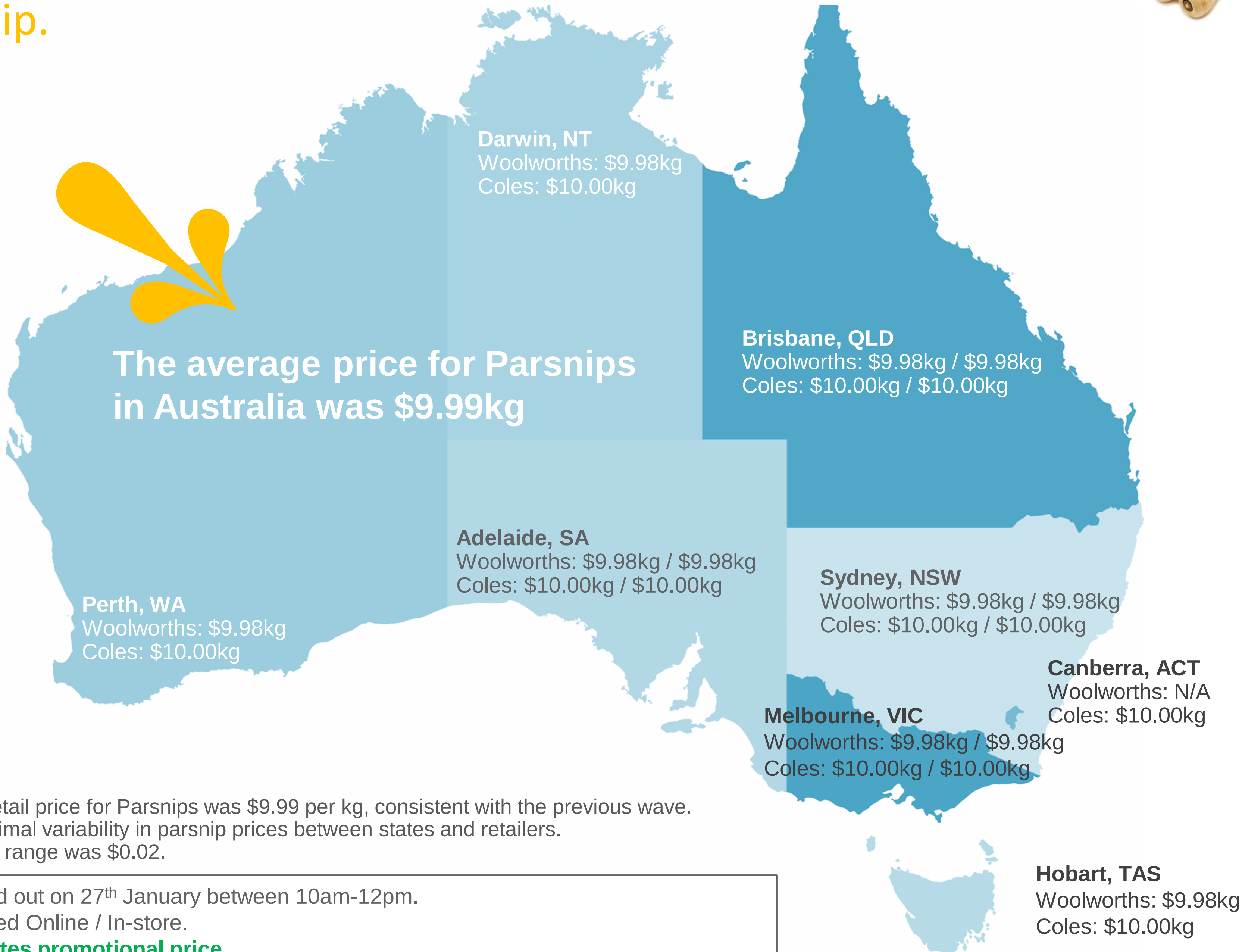
Individual parsnips remain the most common purchase format, whilst popularity in small pre-packaged formats increased this wave.



Q4b. In what fresh formats do you typically purchase Parsnips?
Sample Wave 28 N=206, Wave 32 N=206

Online and In-store Commodity Prices

Parsnip.



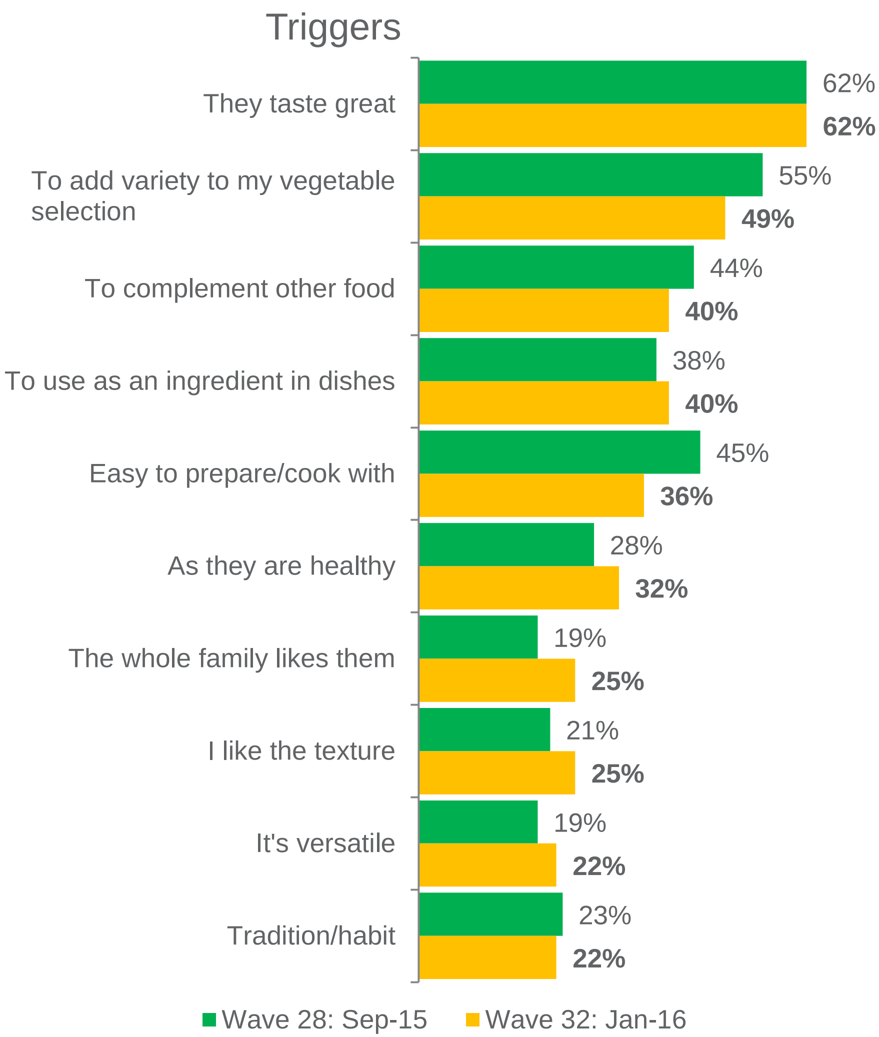
- The average retail price for Parsnips was $9.99 per kg, consistent with the previous wave.
- There was minimal variability in parsnip prices between states and retailers.
- The retail price range was $0.02.

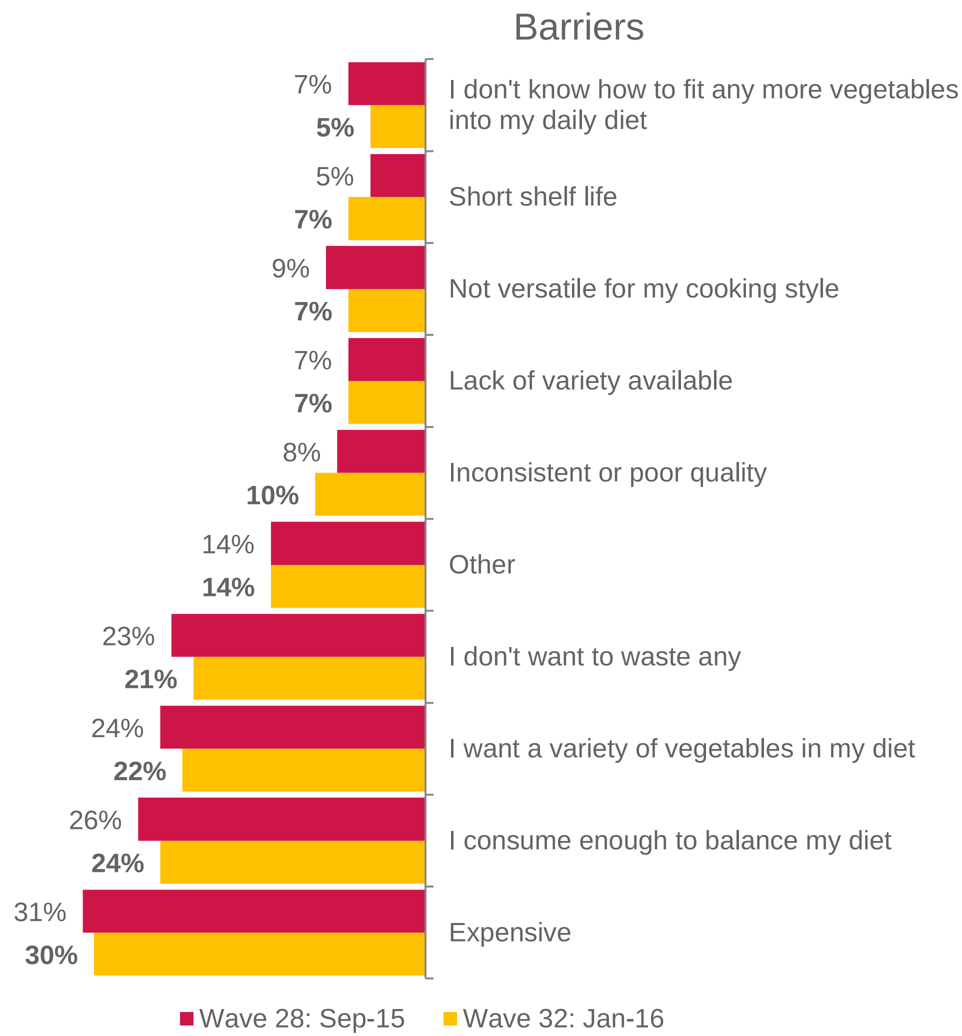
Pricing was carried out on 27th January between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates promotional price.

Awareness of parsnip varieties is low, with 74% of consumers unable to recall a type. However, this is an improvement from Wave 28 (82%). Those who recalled a type were generally prompted by colour.

Q6a. What varieties of Parsnip are you aware of? (unprompted)
Sample Wave 28 N=206, Wave 32 N=206

Taste and adding variety remain the key triggers to purchase. In contrast, expense and already consuming enough to balance their diet are the key barriers.





Q7. Which of the following reasons best describes why you purchase Parsnips?
Q8. Which reason best describes why you don't buy Parsnips more often?
Sample Wave 28 N=206, Wave 32 N=206

There has been a significant increase in Modern Australian cuisine when cooking parsnips.

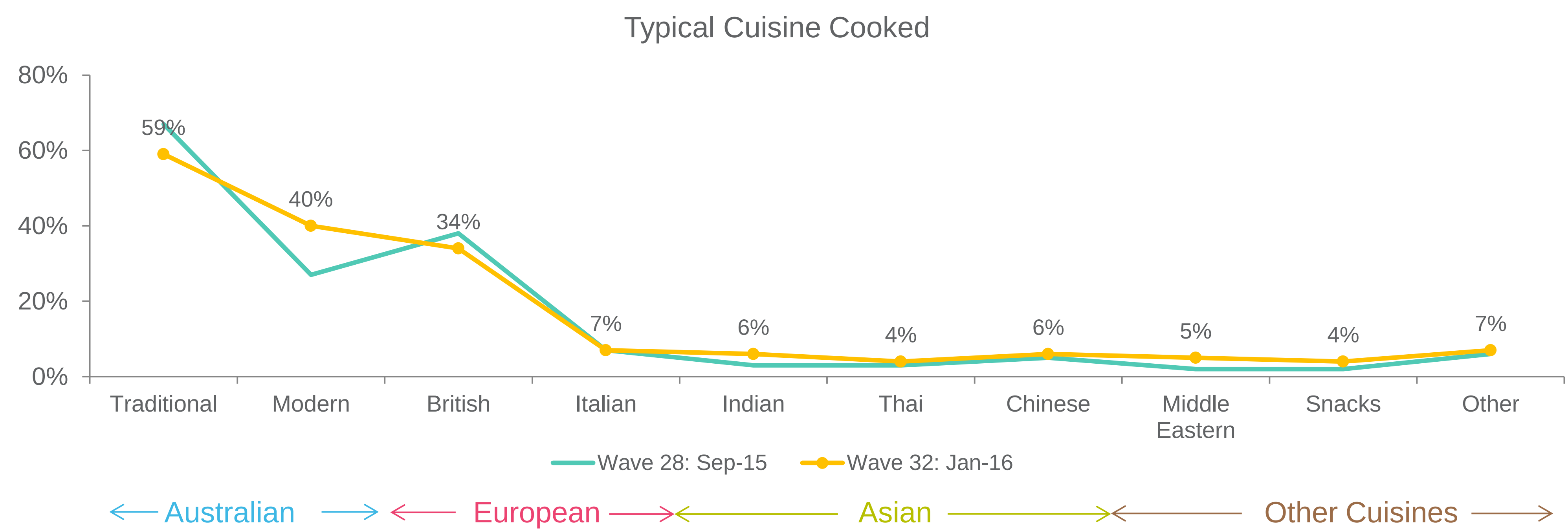
Meal occasions tend to occur during dinner and family meals.

Top 5 Consumption Occasions

	Wave 28	Wave 32
Dinner	66%	**71%**
Family Meals	59%	**56%**
Weekend Meals	39%	**36%**
Weekday Meals	31%	**33%**
Special Occasions	14%	**13%**

13% used parsnip when cooking a new recipe

▼ 8%, Wave 28



Q10. What cuisines do you cook/consume that use Parsnips?
Q11. Which of the following occasions do you typically consume/use Parsnips?
Sample Wave 28 N=206, Wave 32 N=206

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

Consumers prefer to serve parsnips with carrots and potatoes. Parsnips are generally roasted or cooked in soups. There has also been a noticeable increase in grilling as a cooking style this wave.

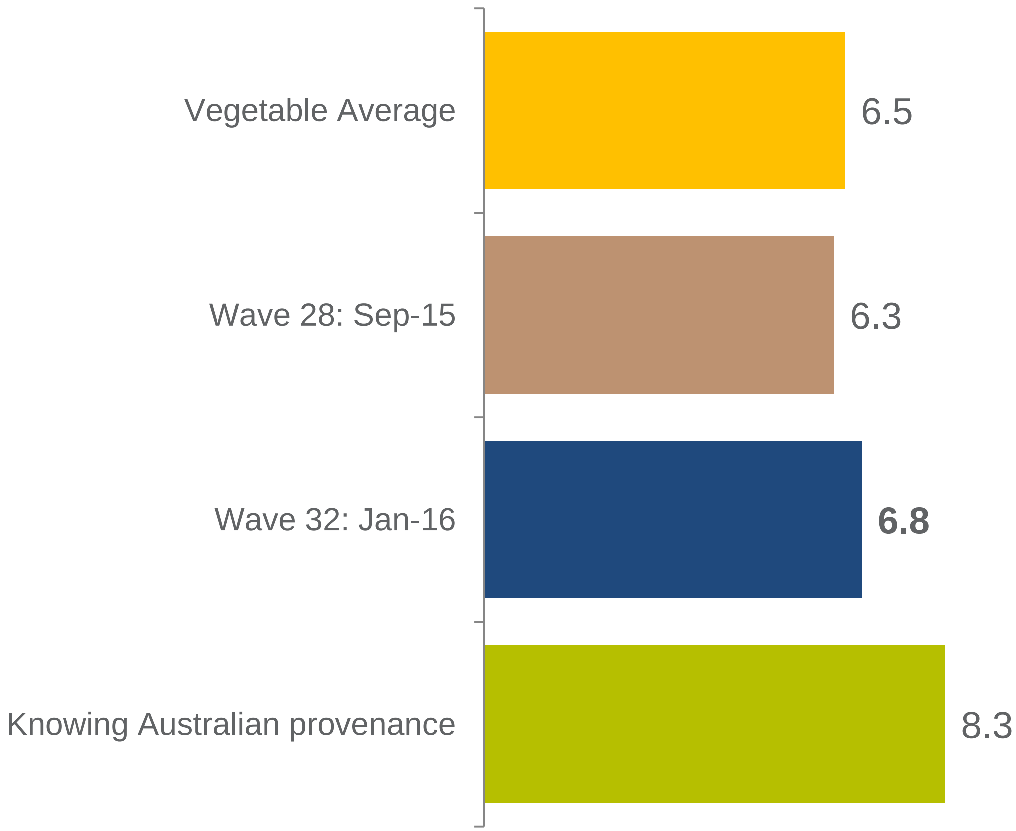
Accompanying Vegetables

Carrots	73% ▼
Potatoes	72% ▼
Pumpkins	51% ▲
Sweet Potatoes	50% ▲
Onions	48% –

Top 10 Cooking Styles		
	Wave 28	Wave 32
Roasting	74%	**70%**
Soup	42%	**40%**
Baking	33%	**36%**
Mashing	28%	**24%**
Slow Cooking	17%	**23%**
Boiling	20%	**21%**
Steaming	15%	**19%**
Stir frying	12%	**11%**
Grilling	3%	**10%**
Frying	7%	**7%**

Q9. How do you typically cook Parsnips?
Q10a. And when are you serving Parsnips which of the following do you also serve together with this?
Sample Wave 28 N=206, Wave 32 N=206

Knowing the provenance of parsnips in general has increased this wave, which now sits above the Vegetable Average. However, knowing that parsnips are grown in Australia is the most important provenance information for consumers.



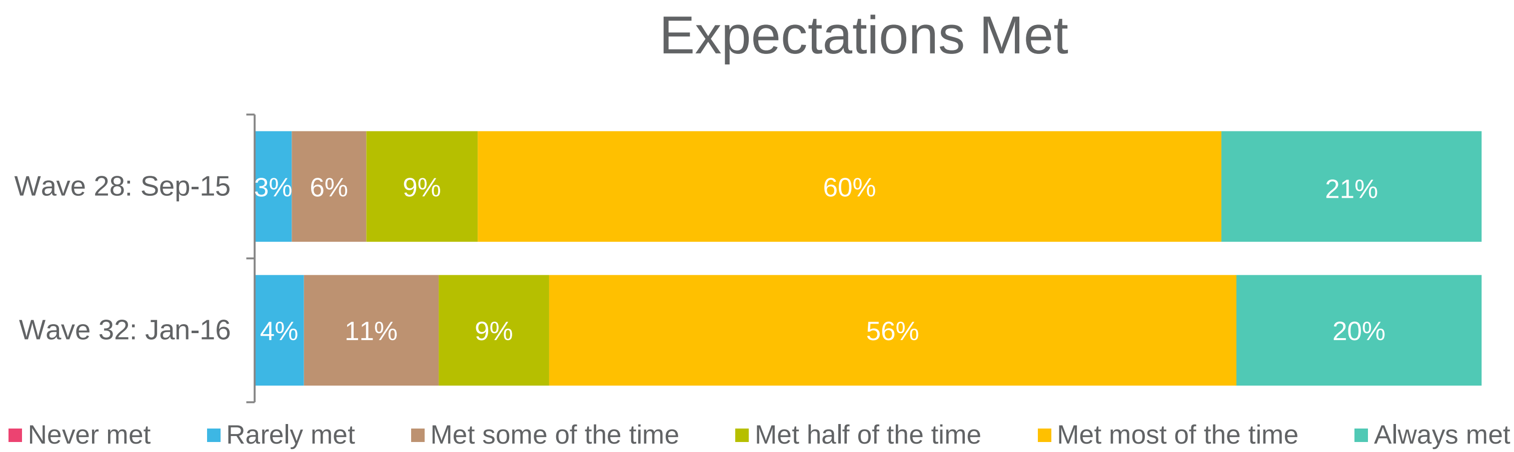
8.3

Q14. When purchasing Parsnips, how important is Provenance to you?
Q15. And when purchasing Parsnips, how important is that it is grown in Australia?
Sample Wave 28 N=206, Wave 32 N=206

Consumers expect parsnips to remain fresh for over a week once purchased, which is being met most of the time. This is relatively consistent with the previous wave.

Expected to stay fresh for **9.9** days

▼ 9.5 days, Wave 28



Q12. How long do you expect Parsnips to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy Parsnips?
Sample Wave 28 N=206, Wave 32 N=206

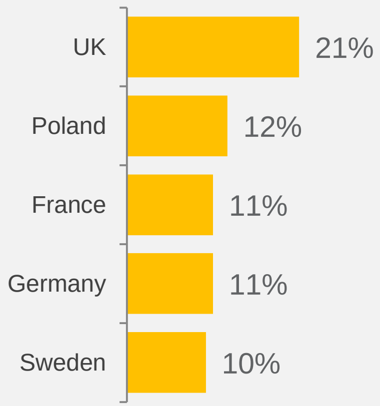
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Parsnip Product Launch Trends.

Parsnip Global Launches
November 2015 – January 2016

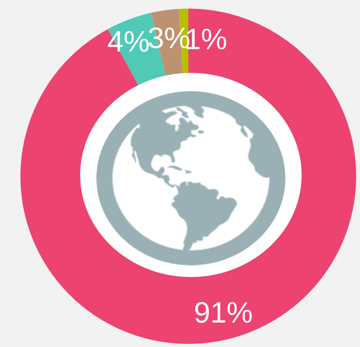
There were 114 parsnip products launched globally over the last three months. The majority of launches were in the UK, Poland and France. Categories for launches were meals and soups. Key packaging for parsnip products were flexible formats.

Country

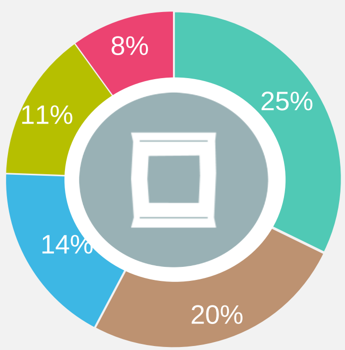


114 Global NPDs

Region



Top Pack Formats



Categories

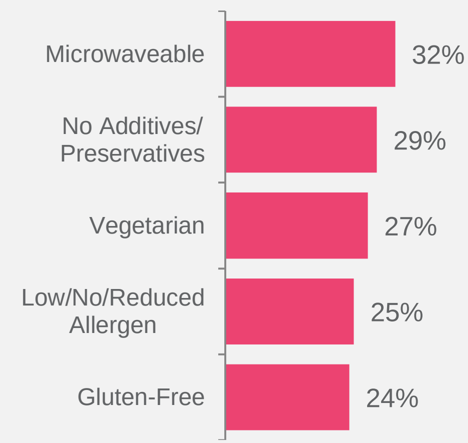
Meals 23%

Soup 21%

Sauces & Seasonings 15%

Snacks 13%

Top Claims



Parsnip Product Launches:
Last 3 Months (November 2015 – January 2016)
Summary

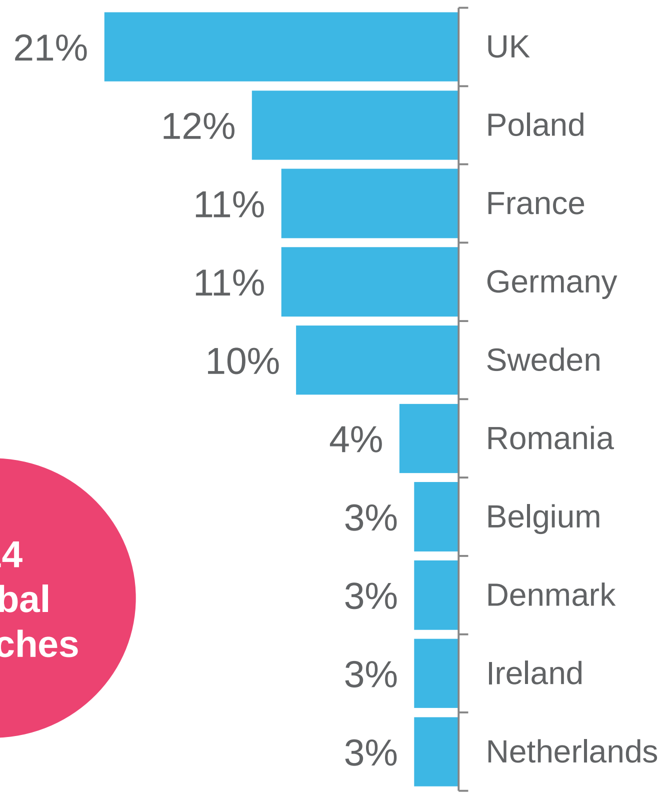
- There were 114 launches in the past 3 months globally that contained parsnip as an ingredient.
- There were 2 products launched in Australia over the past three months.
- Europe (91%) was the key region for launches.
- Flexible packaging (25%) and tubs (20%) were the most common format used for products.
- The main categories for launches were meals (23%), soups (21%), and sauces & seasonings (15%).
- Claims used on products included microwaveable (32%), no additives/preservatives (29%), and vegetarian (27%).
- The most innovative product launched was a Sliced Beetroot & Parsnip Snack from the UK. Examples of these can be found in the following pages.

Source: Mintel (2016)

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

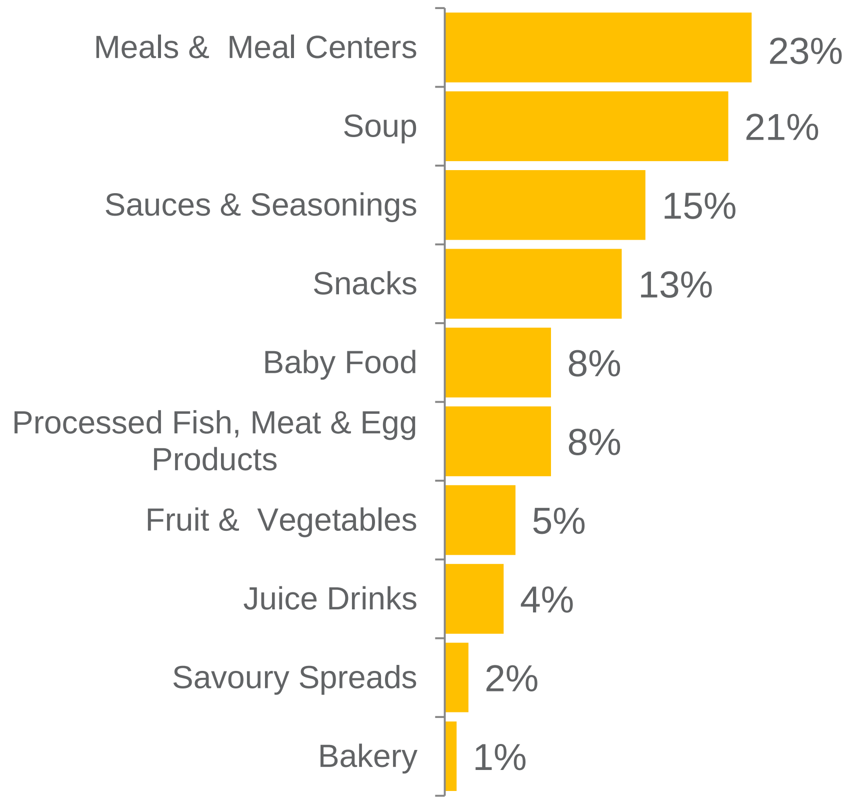
The key categories for parsnip launches are meals, soups, sauces & seasonings, and snack products.

Top Launch Countries



114 Global Launches

Top Launch Categories



Horticulture Innovation Australia

colmar brunton.

The main claims globally were microwaveable, no additives/preservatives and vegetarian.

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

Pack Formats Used

Global	Flexible	25%
	Tub	20%
	Tray	14%
Europe	Flexible	23%
	Tub	20%
	Tray	15%

Top Claims Used

Global	Microwaveable	32%
	No Additives/Preservatives	29%
	Vegetarian	27%
Europe	Microwave	32%
	Vegetarian	29%
	No Additives/Preservatives	28%

Only regions with n >30 are displayed

Innovative Parsnip Launches:
L3M (November 2015 – January 2016)

It's in Our Bones Boned Beef Bone Broth (Canada)

It's in Our Bones Boned Beef Bone Broth is described as a delicious nutrient-dense boned broth that can be sipped straight-up as a filling meal or protein boost before or after workout. This product comes from grass-fed and naturally raised beef, grown with no hormone or antibiotics. It is free from GMO, dairy and gluten, and is packed with natural collagen to help build body tissues, antibodies and strong muscles.

Claims:
Other (Functional), Microwaveable, Gluten-Free, Low/No/Reduced Allergen, Ease of Use, Hormone Free, GMO-Free, Weight & Muscle Gain

Morrisons Great British Soup Winter Vegetable Soup (UK)

Morrisons Great British Soup Winter Vegetable Soup is a vegetable soup with carrot, parsnip, onion, swede, haricot beans, kale, turnip and single cream. This microwaveable product is suitable for vegetarians, and retails in a 600g pack.

Claims:
Microwaveable, Vegetarian, Seasonal

Guld Fågeln Rakt Ner i Grytan Chicken Thigh Fillet and Vegetable Stew with Indian Flavour (Sweden)

Guld Fågeln Rakt Ner i Grytan Färsk Strimlad Kycklinglårfilé, Grönsaker och Färdig Kryddblandning med Smak av Indien (Chicken Thigh Fillet and Vegetable Stew with Indian Flavour) is now available. This product comprises fresh, sliced Swedish chicken thigh fillets, vegetables and a spice mix with Indian flavour, and it only requires crushed tomatoes and yogurt in order to complete the dish. It retails in a 750g pack, containing 500g chicken, 200g vegetables and 50g spice mix.

Claims:
Ease of Use

Coop Änglamark Organic Salted Root Vegetable Crisps (Sweden)

Coop Änglamark Ekologiska Rotfruktchips med Salt (Organic Salted Root Vegetable Crisps) are now available in a newly designed 100g pack featuring the EU Green Leaf, KRAV, and Debio Organic logos. It is made from organic root vegetables that have been carefully washed, thinly sliced and fried in organic sunflower oil until golden and crispy. The product was produced without the use of fertilisers or chemical pesticides.

Claims:
Organic, Ethical - Environmentally Friendly Product

Source: Mintel (2016)

Innovative Parsnip Launches:
L3M (November 2015 – January 2016)

Tesco Finest Slow Cooked Lamb Shanks with Roasted Vegetables (UK)

Tesco Finest Slow Cooked Lamb Shanks with Roasted Vegetables have been relaunched with new brand name, previously known under Tesco Finest Restaurant Collection. The product comprises two marinated New Zealand lamb shanks with a redcurrant gravy, roast carrots, parsnips and red onion. It is suitable for home freezing and retails in a recyclable 1.15kg pack.

Claims:
Premium, Ethical - Environmentally Friendly Package

The True Spirit Snack Co. No. 3 Home Grown Mixed Roots Snacks (Singapore)

The True Spirit Snack Co. No. 3 Home Grown Mixed Roots Snacks comprise carrot, parsnip and beetroot crisps. The product is suitable for vegetarians and retails in a 100g pack featuring an Instagram reference.

Claims:
Vegetarian, Social Media

Auchan Baby Parsnip, Sweet Potato & Turkey Christmas Lunch (France)

Auchan Baby Mon Repas de Midi Spécial Fête Panais, Patate Douce et Dinde (Parsnip, Sweet Potato & Turkey Christmas Lunch) is now available in a limited edition. The product has been cooked in France, contains puree and pieces and is free from colourings and preservatives. It is suitable for babies from 12 months of age, can be heated in a microwave and retails in a partly recyclable 230g pack.

Claims:
No Additives/Preservatives, Microwaveable, Babies & Toddlers (0-4), Seasonal, Ethical - Environmentally Friendly Package, Limited Edition

Tesco Butternut Squash & Parsnip Bake (UK)

Tesco Butternut Squash & Parsnip Bake has been added to the range. The meal comprises of layered vegetables of butternut squash, parsnip, potato and kale, topped with cheese sauce and bread crumbs. It can be cooked in 45 minutes and is free from artificial flavours or colours. The vegetarian friendly product retails in a 450g partially recyclable pack.

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

Source: Mintel (2016)

Innovative Parsnip Launches:
L3M (November 2015 – January 2016)

Culinea Penne Gorgonzola (Slovakia)

Culinea Penne Gorgonzola (Penne Gorgonzola) comprises creamy cheese sauce with spinach and gorgonzola cheese. The microwaveable product retails in a 750g pack, which provides two servings.

Claims:
Microwaveable

Waitrose Maple Roasted Winter Vegetables (UK)

Waitrose Maple Roasted Winter Vegetables comprise a mix of carrots, parsnips and potatoes with maple syrup butter. This vegetarian product is ready to serve in 26 minutes and retails in a partly recyclable 365g pack providing two servings.

Claims:
Vegetarian, Ethical - Environmentally Friendly Package

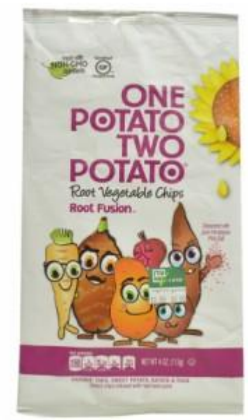
Nothing But. Sliced Beetroot & Parsnip Snack (UK)

Nothing But. Sliced Beetroot & Parsnip Snack comprises freeze dried vegetable slices. The product contains no added fat, salt, sugar, colour or preservatives and is never fried. It contains 36 calories per pack, is suitable for vegans and vegetarians and the manufacturer states that all that they do is slice the vegetables, take the water out and seal them in a bag. The product retails in an 11g pack featuring Facebook and Twitter logos.

Claims:
No Additives/Preservatives, Low/No/Reduced Fat, Low/No/Reduced Sugar, Low/No/Reduced Sodium, Vegetarian, Vegan, No Animal Ingredients, Social Media

One Potato Two Potato Root Fusion Root Vegetable Chips (Israel)

One Potato Two Potato Root Fusion Root Vegetable Chips are now available. The all natural, gluten free, and kosher certified product comprises parsnip, sweet potato, batata and yuca, infused with real beet juice and seasoned with pure Himalayan pink salt. It is kettle cooked in small batches with expeller-pressed sunflower oil in a nut free factory, contains no artificial flavours or preservatives, and is made with non-GMO ingredients.



Claims:
No Additives/Preservatives, All Natural Product, Kosher, Gluten-Free, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Product, GMO-Free, Social Media

Source: Mintel (2016)

Beetroot.

Purchase and consumption of beetroot remained relatively consistent with the past two waves.

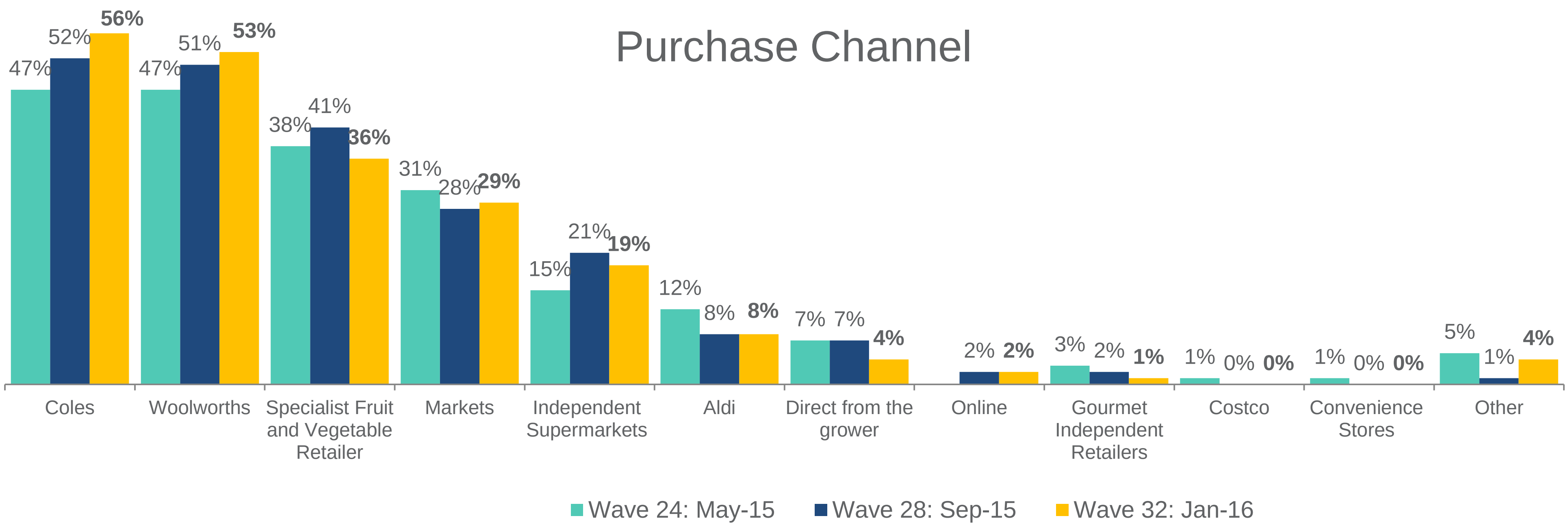
There has been a continuous increase in purchase from mainstream supermarkets.

Average Purchase **3.0 times** per month

▲ 3.3 times, Wave 24
▲ 3.2 times, Wave 28

Average Consumption **8.1 times** per month

▼ 7.6 times, Wave 24
▲ 8.3 times, Wave 28



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 24 N=259, Wave 28 N=206, Wave 32 N=207

Horticulture Innovation Australia colmar brunton.

Average Spend and Price Sensitivity.

Average weight of purchase

The average consumer typically purchases **0.9kg** of beetroots, which is slightly below the previous waves.

▲ 1.0kg, Wave 24
▲ 1.0kg, Wave 28

Recalled last spend

The average recalled last spend is **$3.90** in January 2016, consistent with Wave 28.

▲ $4.70, Wave 24
– $3.90, Wave 28

Value for money

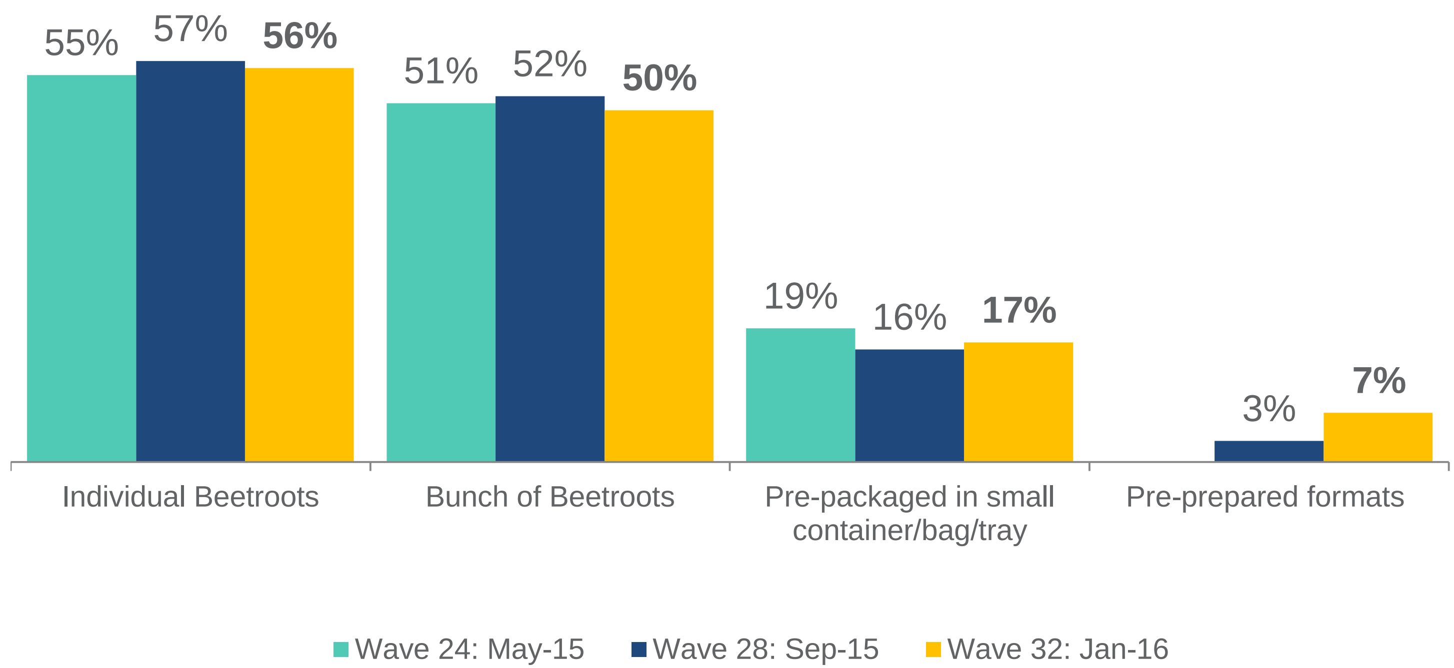
On average, consumers perceive beetroot to be good value for money **(6.4/10).**

▲ 6.5/10, Wave 24
▲ 6.5/10, Wave 28

Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typical purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 24 N=259, Wave 28 N=206, Wave 32 N=207

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

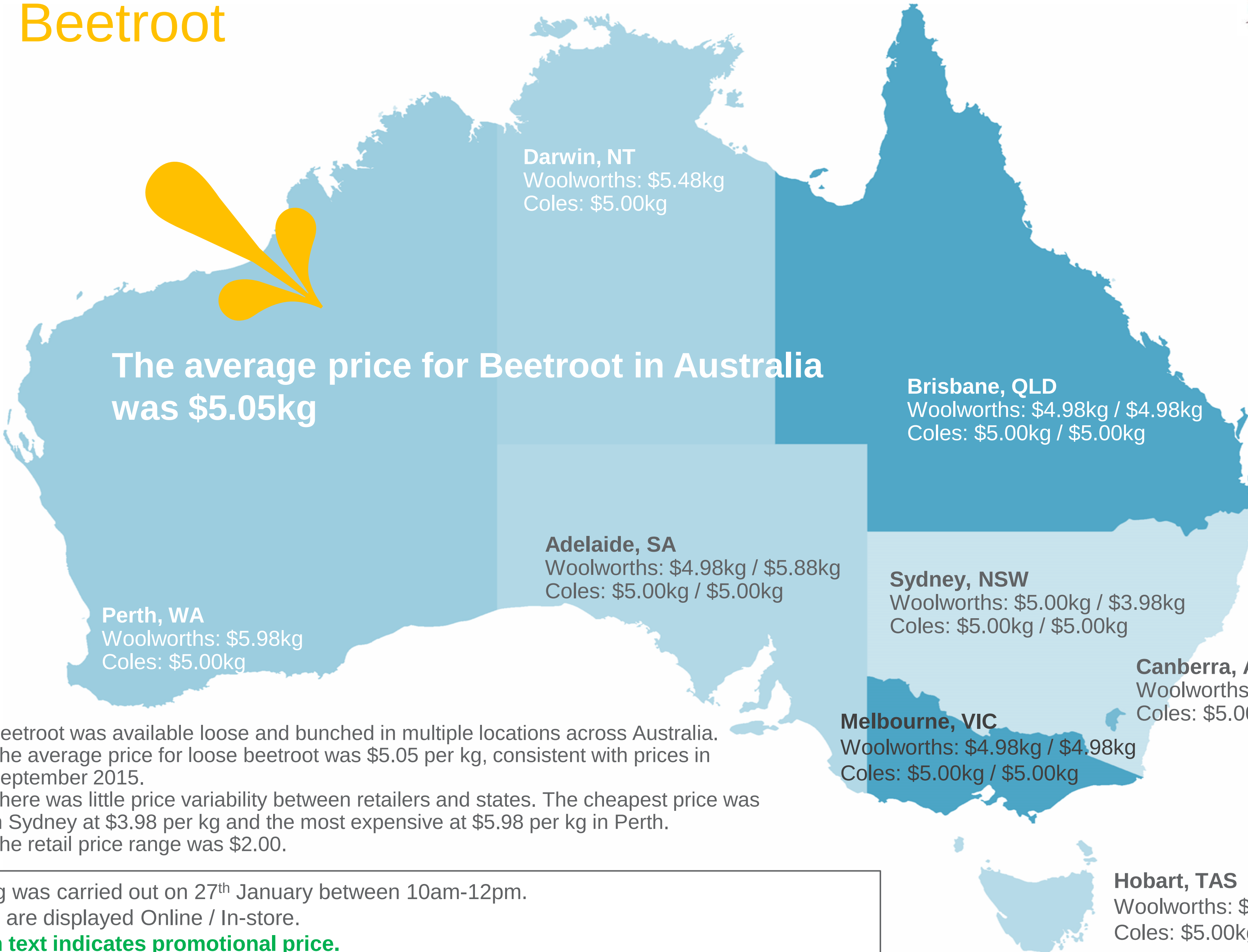
This wave saw little change in purchase formats. Both individual and bunched beetroot formats appeal most to consumers.



Q4b. In what fresh formats do you typically purchase Beetroot?
Sample Wave 24 N=259, Wave 28 N=206, Wave 32 N=207

Online and In-store Commodity Prices

Beetroot



The average price for Beetroot in Australia was $5.05kg

Darwin, NT
Woolworths: $5.48kg
Coles: $5.00kg

Brisbane, QLD
Woolworths: $4.98kg / $4.98kg
Coles: $5.00kg / $5.00kg

Adelaide, SA
Woolworths: $4.98kg / $5.88kg
Coles: $5.00kg / $5.00kg

Sydney, NSW
Woolworths: $5.00kg / $3.98kg
Coles: $5.00kg / $5.00kg

Perth, WA
Woolworths: $5.98kg
Coles: $5.00kg

Canberra, ACT
Woolworths: $4.98kg
Coles: $5.00kg

Melbourne, VIC
Woolworths: $4.98kg / $4.98kg
Coles: $5.00kg / $5.00kg

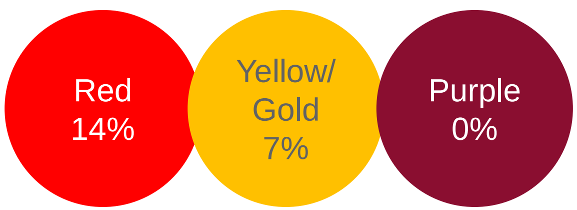
Hobart, TAS
Woolworths: $4.98kg
Coles: $5.00kg

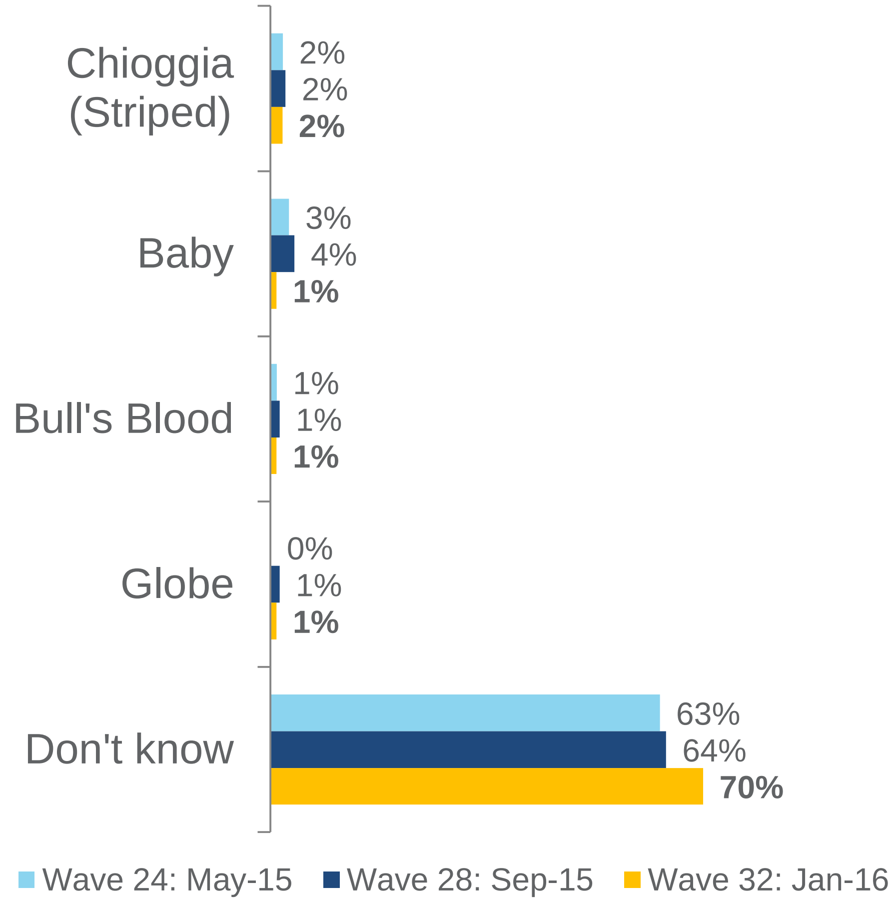
- Beetroot was available loose and bunched in multiple locations across Australia. The average price for loose beetroot was $5.05 per kg, consistent with prices in September 2015.
- There was little price variability between retailers and states. The cheapest price was in Sydney at $3.98 per kg and the most expensive at $5.98 per kg in Perth.
- The retail price range was $2.00.

Pricing was carried out on 27th January between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates promotional price.

Awareness of beetroot varieties is consistently low across the waves.

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

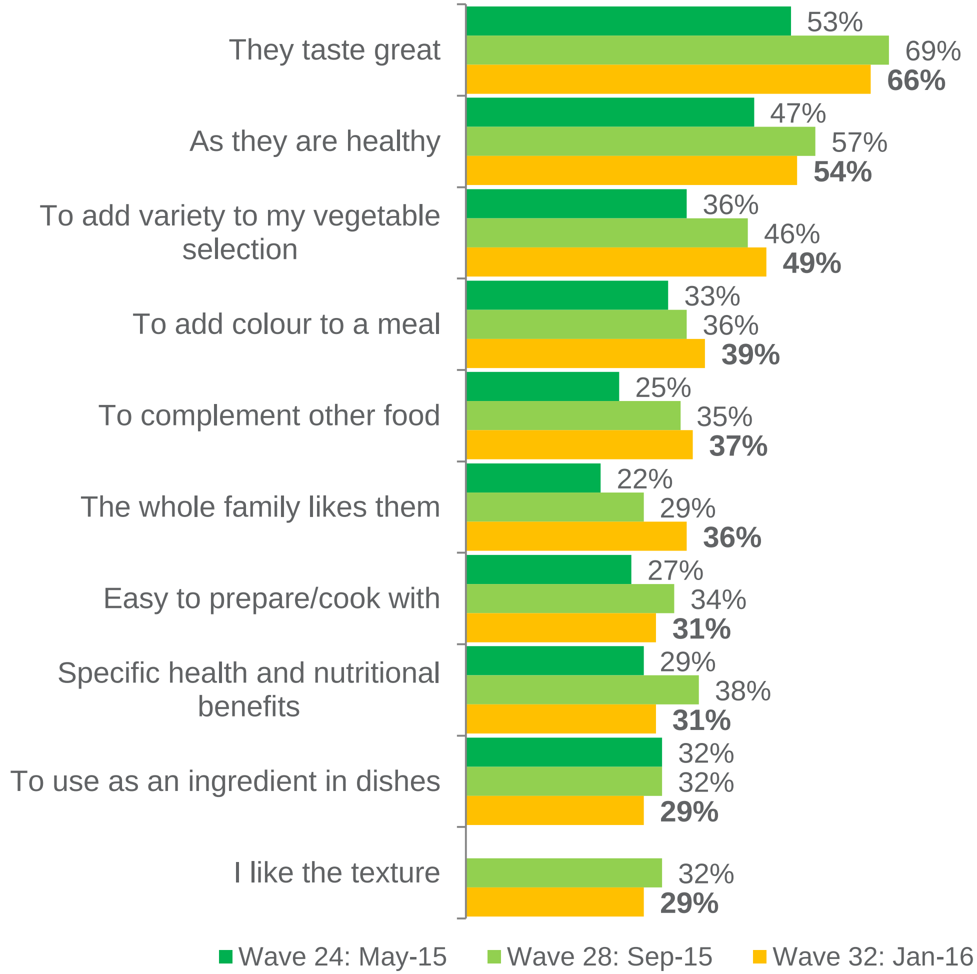




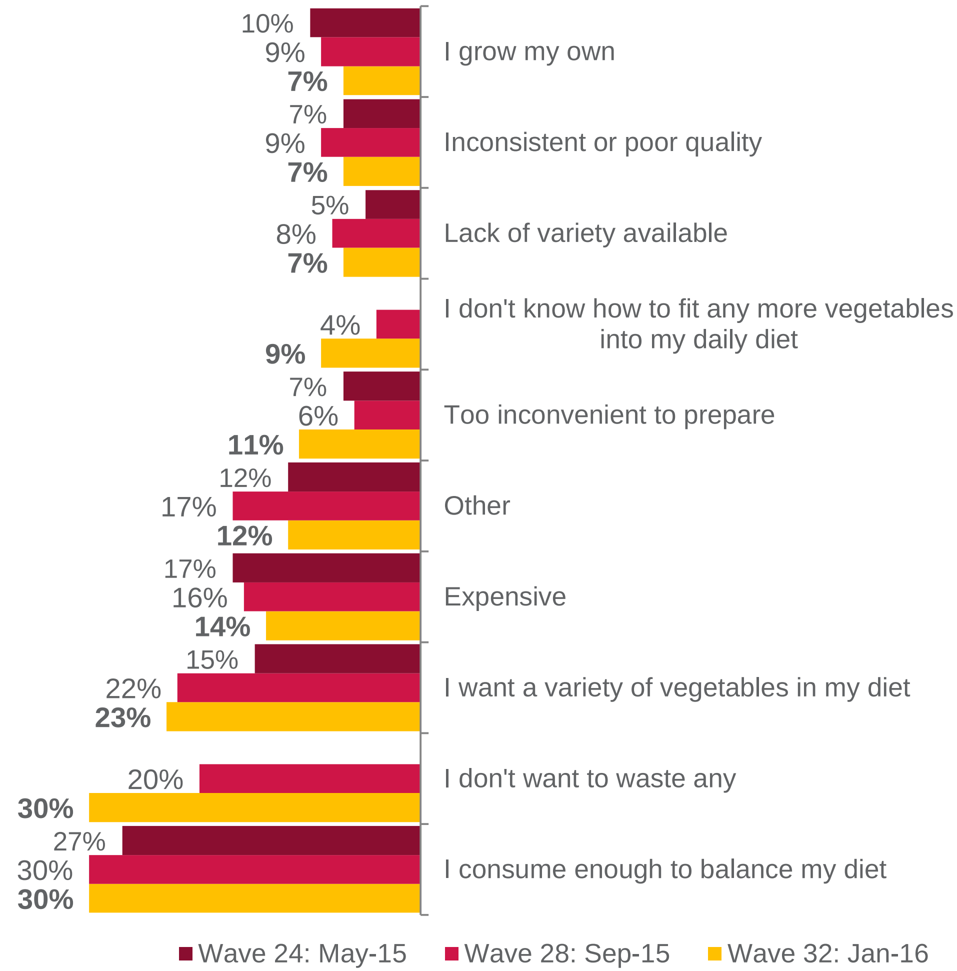
Q6a. What varieties/types of <commodity> are you aware of? (unprompted)
Sample Wave 24 N=259, Wave 28 N=206, Wave 32 N=207

The main triggers for beetroot purchase are because it tastes great and is very healthy. Consumers list having enough for their needs and not wanting to waste any as the key barriers to purchase.

Triggers



Barriers



Q7. Which of the following reasons best describes why you purchase <commodity> ?
Q8. Which reason best describes why you don't buy <commodity> more often?
Sample Wave 24 N=259, Wave 28 N=206, Wave 32 N=207

There was minimal change in typical cuisines cooked with beetroot when compared to past waves.

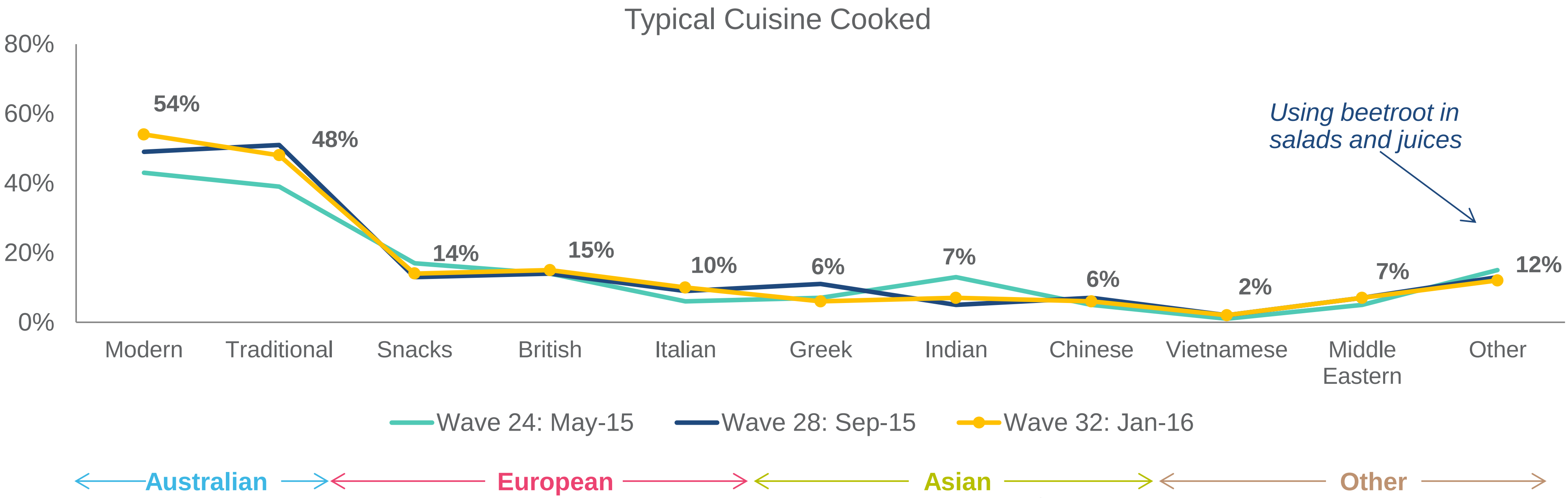
Consumption occasions are generally during dinner and family meals.

Top 5 Consumption Occasions

	Wave 28	Wave 32
Dinner	62%	**61%**
Family Meals	58%	**51%**
Lunch	43%	**43%**
Weekday Meals	38%	**34%**
Weekend Meals	37%	**31%**

17% used beetroot when cooking a new recipe

17%, Wave 28



Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?
Sample Wave 24 N=259, Wave 28 N=206, Wave 32 N=207

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

The most popular cooking styles for beetroot are roasting and boiling, consistent with the previous wave. Consumers opt to serve beetroot with tomatoes, onions and carrots.

Accompanying Vegetables

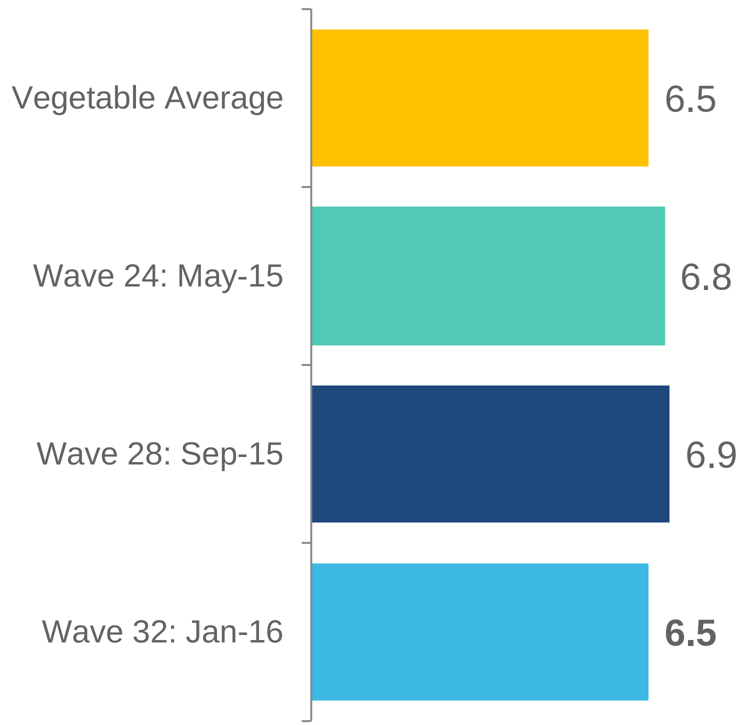
Tomato	47%
Onions	47%
Carrot	43%
Lettuce	39%
Potatoes	37%

Top Cooking Styles

	Wave 24	Wave 28	Wave 32
Roasting	37%	45%	**45%**
Boiling	38%	46%	**43%**
Raw	26%	26%	**33%**
Baking	28%	27%	**25%**
Steaming	16%	20%	**20%**
Slow Cooking	6%	14%	**14%**
Soup	14%	14%	**12%**
Stir frying	6%	7%	**9%**
Microwave	6%	12%	**8%**
Other	5%	6%	**7%**

Q9. How do you typically cook <commodity>?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
Sample Wave 24 N=259, Wave 28 N=206, Wave 32 N=207

Importance of beetroot provenance has decreased this wave and now sits in line with the Vegetable Average. Overall, consumers find it very important to know that beetroots are grown in Australia.



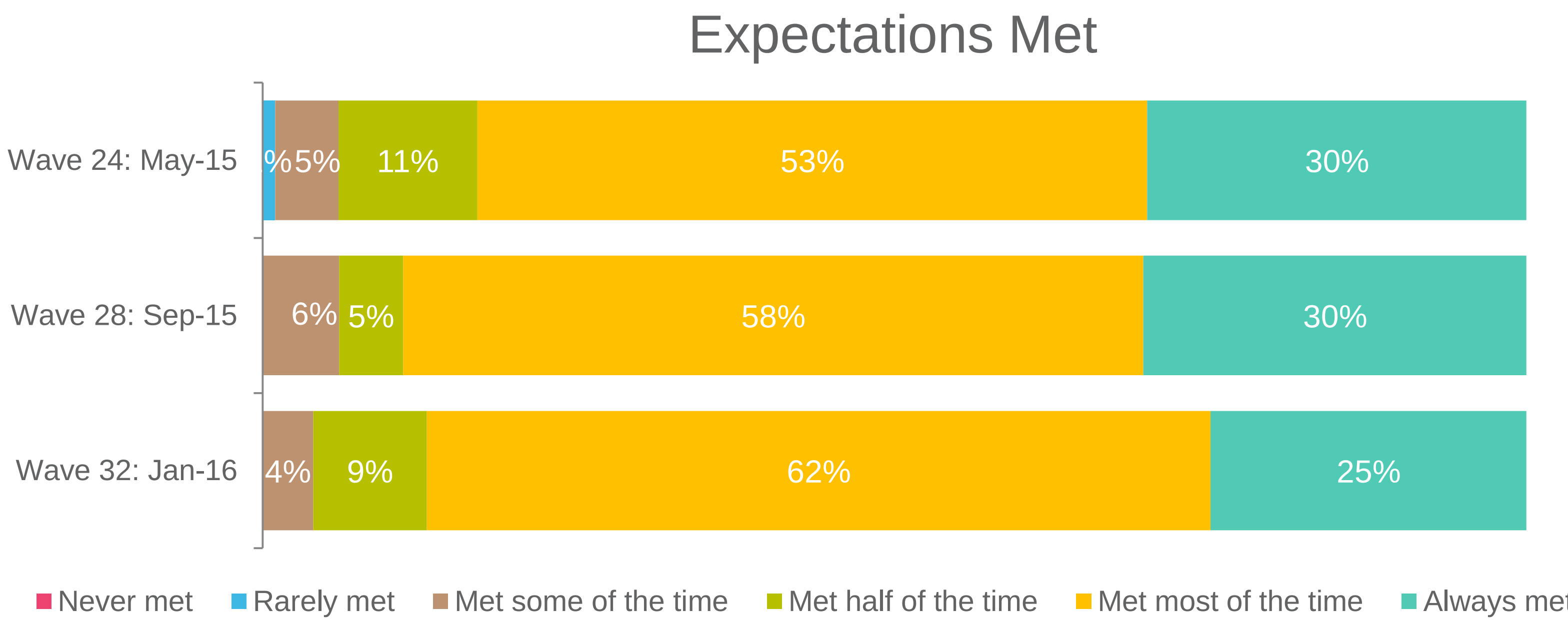
Q14. When purchasing <commodity>, how important is Provenance to you?
Mean scores out of 10.
Sample Wave 24 N=259, Wave 28 N=206, Wave 32 N=207

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

Although freshness expectations are being met at least most of the time, they have slightly declined this wave.

Expected to stay fresh for **9.7** days

▲ 10.4 times, Wave 24
▲ 10.3 times, Wave 28



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 24 N=259, Wave 28 N=206, Wave 32 N=207

Horticulture Innovation Australia

colmar brunton.

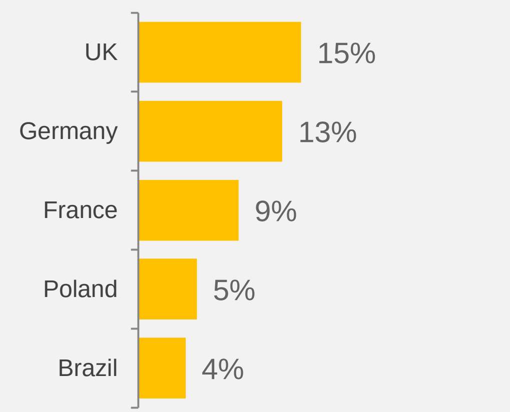
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Trends: Beetroot

Beetroot Global NPDs
November 2015 – January 2016

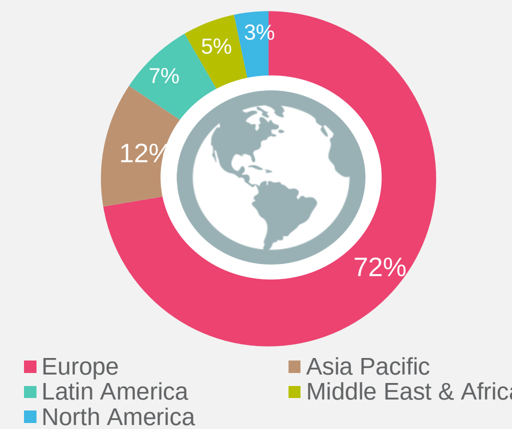
There were 575 products containing beetroot as an ingredient launched globally in the last three months. The majority of these launches occurred in Europe, in particular UK and Germany, which was consistent with past trends. Products were launched in dairy, confectionary, snacks and bakery.

Country

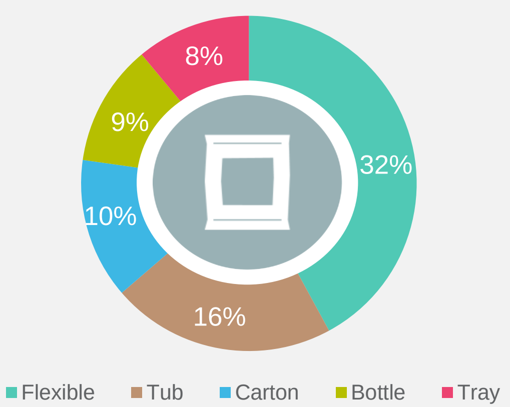


575 Global Launches

Region



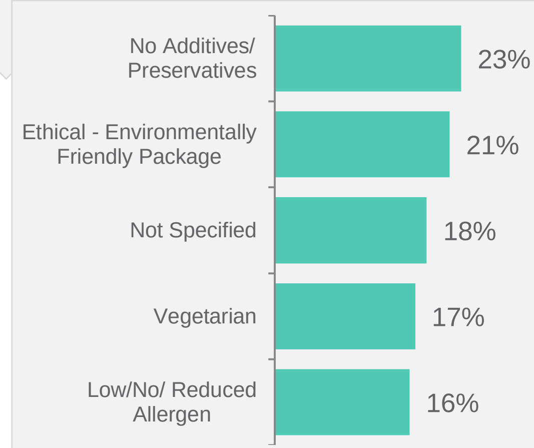
Top Pack Formats



Categories

Dairy 13%	Confectionary 10%
Snacks 9%	Bakery 8%

Top Claims

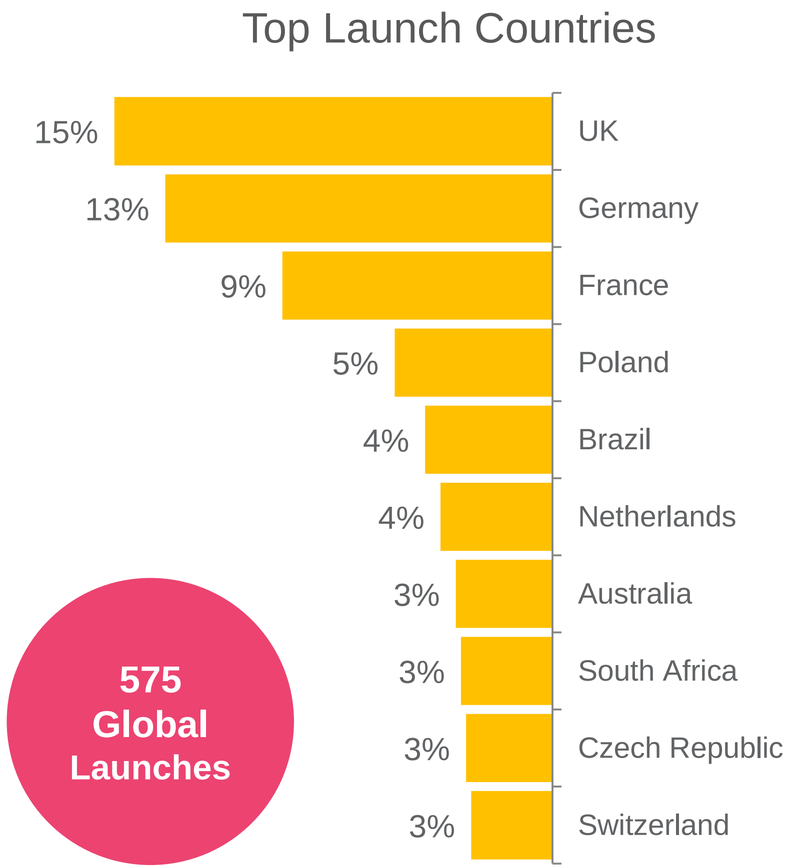


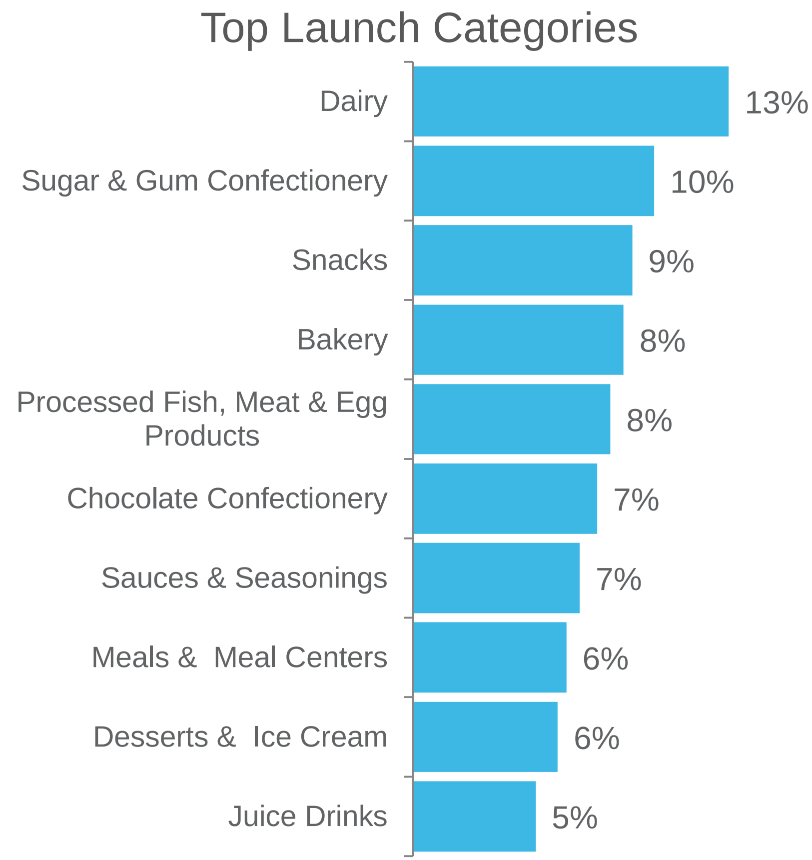
Beetroot Product Launches:
Last 3 Months (November 2015 – January 2016)
Summary

- There were 575 global beetroot products launched globally over the last three months.
- There were 19 products launched in Australia this wave.
- The majority of products were launched in Europe (72%). Key countries for launches were the UK (15%) and Germany (13%), consistent with previous trends.
- Flexible packaging was the most common format used (32%). Tubs were also popularly utilised (16%).
- Top launch categories were Dairy (13%), Confectionary (10%), Snacks (9%) and Bakery items (8%). It appears that beetroot is largely used as a colouring for desserts and dairy.
- Popular claims were around no additives/preservatives (23%), and ethical/environmentally friendly packaging (21%).
- The most innovative beetroot product launched was a Beetroot & Shallot Mousse from France (examples of these can be found in the following pages).

Source: Mintel (2016)

Consistent with the previous wave, UK and Germany were the key countries for product launches. Dairy, sugar & gum confectionary, snacks, and bakery were the key categories for products launched.





Flexible packaging, tubs and cartons were the main formats used for products launches. No additives/preservatives was the key claim used.

Pack Formats Used

Global	Flexible	32%
Global	Tub	16%
Global	Carton	10%
Europe	Flexible	29%
Europe	Tub	19%
Europe	Carton	11%
Asia Pacific	Flexible	36%
Asia Pacific	Tub	13%
Asia Pacific	Bottle	10%

Top Claims Used

Region	Claim	%
Global	No Additives/Preservatives	23%
Global	Ethical - Environmentally Friendly Package	21%
Global	Vegetarian	18%
Europe	Ethical - Environmentally Friendly Package	23%
Europe	No Additives/Preservatives	20%
Europe	Vegetarian	16%
Asia Pacific	Vegetarian	36%
Asia Pacific	No Additives/Preservatives	33%
Asia Pacific	Social Media	23%

Only regions with n >30 are displayed

Innovative Beetroot Launches:
L3M (November 2015 – January 2016)

Pukka Blackcurrant Beauty Tea (Netherlands)

Pukka Blackcurrant Beauty Tea is made with deliciously deep purple organic fruits including juicy blackcurrant and sweetly dark beetroot, combined with the natural power of hibiscus flowers and rosehips, and the mellow fruitiness of orange peel, to make one glow inside and out. This naturally caffeine-free and ethically sourced tea is kosher certified and is free from GMOs. The product retails in a 38g recyclable pack, containing 20 tea bags.

Claims:
Other (Functional), Kosher, Organic, Beauty Benefits, Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Ethical - Human, GMO-Free, Caffeine Free

Vega Sport Performance Protein Berry Flavour Drink Mix (Canada)

Vega Sport Performance Protein Berry Flavour Drink Mix is a complete multi-source blend of premium, plant-based protein made from pea, alfalfa, pumpkin, sunflower seed. It provides 30g protein, 6g BCAAs, 6g glutamine, turmeric, tart cherry, and probiotics that can be consumed post workout to help build and repair strong muscles, and reduce recovery time. The drink is free from gluten, added sugar, artificial flavours, artificial colours, or sweeteners.

Claims:
No Additives/Preservatives, Other (Functional), Low/No/Reduced Sugar, Premium, Gluten-Free, Low/No/Reduced Allergen, Vegan, No Animal Ingredients, GMO-Free, Weight & Muscle Gain, Social Media

Organique Vegee Baked Organic Veggie Snacks (Czech Republic)

Organique Vegee Pecený Zeleninový Snack (Baked Organic Veggie Snacks) are now available. This organic, vegetarian, baked, non-fried, gluten-free product is made with carrot, beetroot and broccoli, contains 60% less fat than regular potato crisps, no trans fats, no cholesterol and no GMO. It is said to be oven baked at low temperatures to maintain the great flavour and retails in an 85g pack featuring EU Green Leaf, EKO and GF-certified logos.

Claims:
Low/No/Reduced Cholesterol, Low/No/Reduced Fat, Organic, Vegetarian, Gluten-Free, Low/No/Reduced Transfat, Low/No/Reduced Allergen, GMO-Free

Woolworths Food Cooked Beetroot (South Africa)

Woolworths Food Cooked Beetroot is ideal for salads or as a accompaniment to a meal, simply requiring the addition of a vinaigrette. The easy-to-use product is suitable for vegetarians and retails in a 450g pack featuring serving suggestions.

Claims:
Vegetarian, Ease of Use

Source: Mintel (2016)

Innovative Beetroot Launches:
L3M (November 2015 – January 2016)

Refit Apple, Beetroot and Carrot Raw Juice (Czech Republic)

Refit Jablko s Cervenou Repou a Mrkví (Apple, Beetroot and Carrot Raw Juice) is now available. This raw, high pressure processed, 100% natural juice is free from preservatives and is said to have the taste and vitamin content of a freshly squeezed juice. It retails in a 200ml pack.

Claims:
No Additives/Preservatives, All Natural Product

Müller Semolina Pudding with Raspberries (Romania)

Müller Budinca de Gris cu Preparat de Zmeura (Semolina Pudding with Raspberries) is now available. The product retails in a 160g pack containing 125g of pudding and 35g of raspberry preparation.

Claims:
N/A

Florette Beetroot & Shallot Mousse (France)

Florette Mousse de Betterave à l'Echalote (Beetroot & Shallot Mousse) is now available. This ready-to-eat product is free from colourings and artificial flavourings, and retails in a 100g pack.

Claims:
No Additives/Preservatives, Ease of Use

K Classic Beetroot Balls (Romania)

K-Classic Sfecla Rosie Bilute (Beetroot Balls) have been pasteurised. The economy product retails in a 330g pack.

Claims:
Economy

Source: Mintel (2016)

Innovative Beetroot Launches:

L3M (November 2015 – January 2016)

Kalbe Prenagen Mommy Strawberry Flavoured Drink for Pregnant Mothers (Indonesia)

Kalbe Prenagen Mommy Minuman Khusus Ibu Hamil Rasa Stroberi (Strawberry Flavoured Drink for Pregnant Mothers) has been reformulated with "PRENAPro" which is specifically formulated to satisfy the nutritional requirements of the mother at any stage of pregnancy during the Golden Period (Window of Opportunity).

Claims:
Other (Functional), Female, Halal, Digestive (Functional), Bone Health, Social Media

Flipz Minis Pink Fudge Covered Pretzels (USA)

Flipz Minis Pink Fudge Covered Pretzels are described as fun, poppable combination of crunchy pretzels and sweet, pink fudge coating. The seasonal kosher certified product retails in a 12.5-oz. pack containing 25 x 0.5-oz. shareable bags. The bags can be personalized and are perfect for classroom exchange, Valentine's Day parties, school lunch boxes and afternoon snacks.

Claims:
Kosher, Children (5-12), Seasonal

M&S Crinkle Cut Beetroot with Chives (UK)

M&S Crinkle Cut Beetroot with Chives is now available. The ready to eat product provides 33 calories per pack, and retails in an 80g pack featuring the Eat Well logo.

Claims:
Ease of Use

Rude Health The Beetroot Snack Bar (France)

Rude Health The Beetroot Snack Bar has been repackaged. The bar is free from gluten, GMO, dairy, and refined sugar. The kosher product is suitable for vegetarians and retails in a 35g pack featuring the Facebook, Twitter, Pinterest and Instagram logos along with the Great Taste 2013 mark.

Claims:
Kosher, Low/No/Reduced Sugar, Vegetarian, Gluten-Free, Low/No/Reduced Allergen, GMO-Free, Social Media

Source: Mintel (2016)

Australian Beetroot Launches:
L3M (November 2015 – January 2016)

Impressed Berry Beets Cold Pressed Juice

The Happy Sol Food Company Super Greens+ Detox Blend

Harris Farm Markets Imperfect Picks Fresh Beetroot Horseradish & Dill Dip

Coles Finest Tasmanian Beetroot Cured Smoked Salmon with Beetroot Chutney

Woolworths Created with Jamie Beautiful Beetroot, Tahini & Pomegranate Dip

The Pure Produce Company The Perfect Entertainer Original Dips Pack

Source: Mintel (2016)

Sweetpotatoes.

Consumption and purchase has remained consistent with the previous wave. Consumers continue to purchase sweetpotatoes from mainstream and specialist retailers.

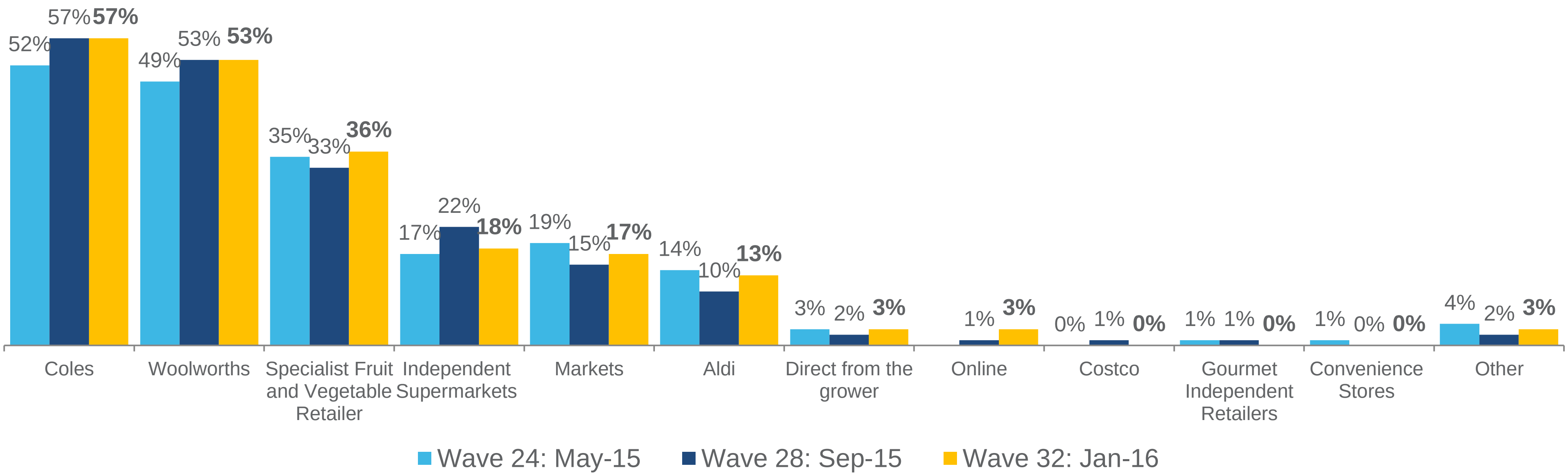
Average Purchase **3.4** times per month

- ▼ 3.1 times, Wave 24
- — 3.4 times, Wave 28

Average Consumption **7.8** times per month

- ▼ 7.0 times, Wave 24
- ▼ 7.7 times, Wave 28

Purchase Channel



Q1. On average, how often do you purchase <commodity> ?
Q2. On average, how often do you consume <commodity>?
Q5. From which of the following channels do you typically purchase <commodity> ?
Sample Wave 24 N=307, Wave 28 N=206, Wave 32 N=202

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

Average Spend and Price Sensitivity.

Average weight of purchase

The average consumer typically purchased **1.2kg** of sweetpotatoes in January 2016.

▼ 1.0kg, Wave 24
▼ 1.1kg, Wave 28

Recalled last spend

The average recalled last spend for sweetpotatoes was **$3.60**.

▼ $3.50, Wave 24
▼ $3.20, Wave 28

Value for money

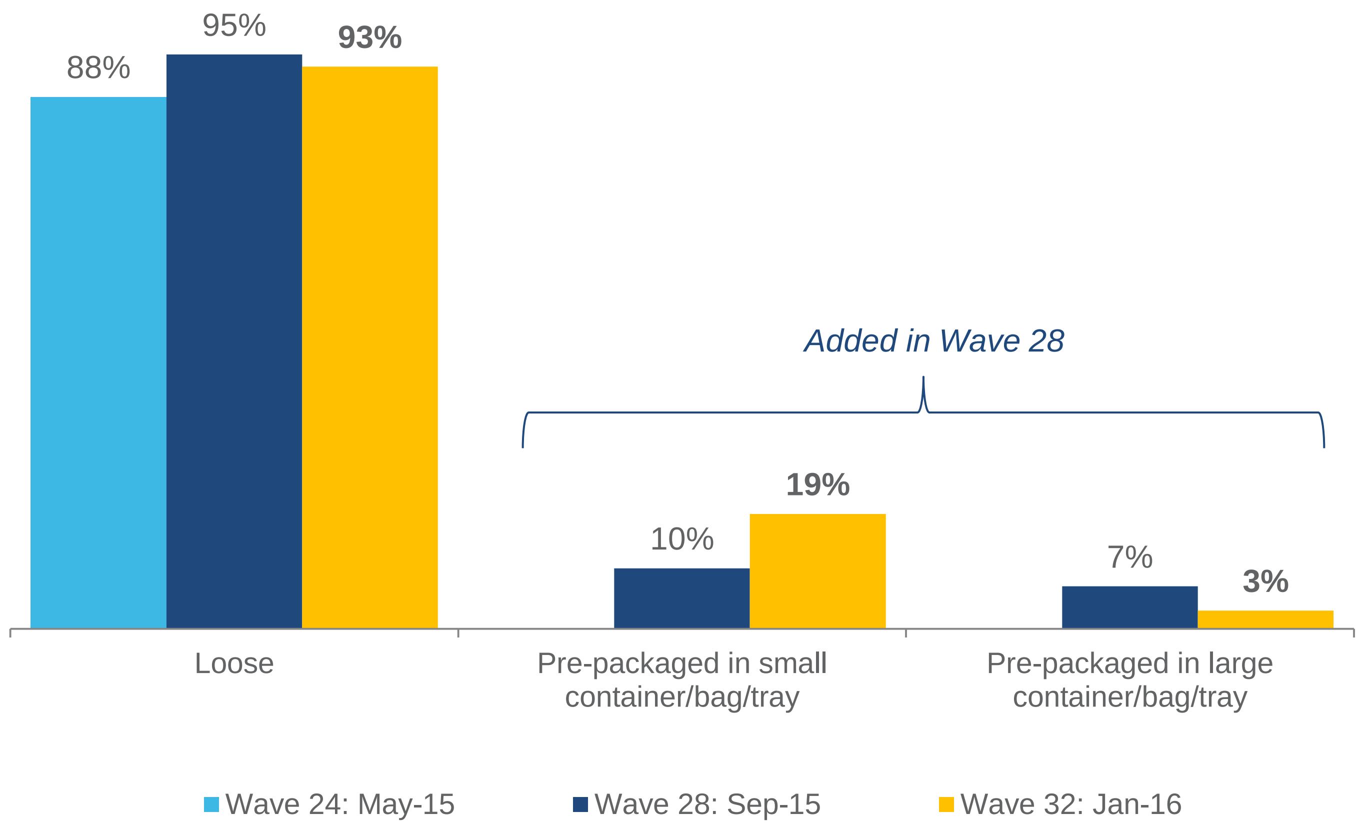
On average, consumers perceived sweetpotatoes to be good value for money **(6.5/10)**, relatively consistent with past waves.

▲ 6.6/10, Wave 24
▲ 6.6/10, Wave 28

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 24 N=307, Wave 28 N=206, Wave 32 N=202

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

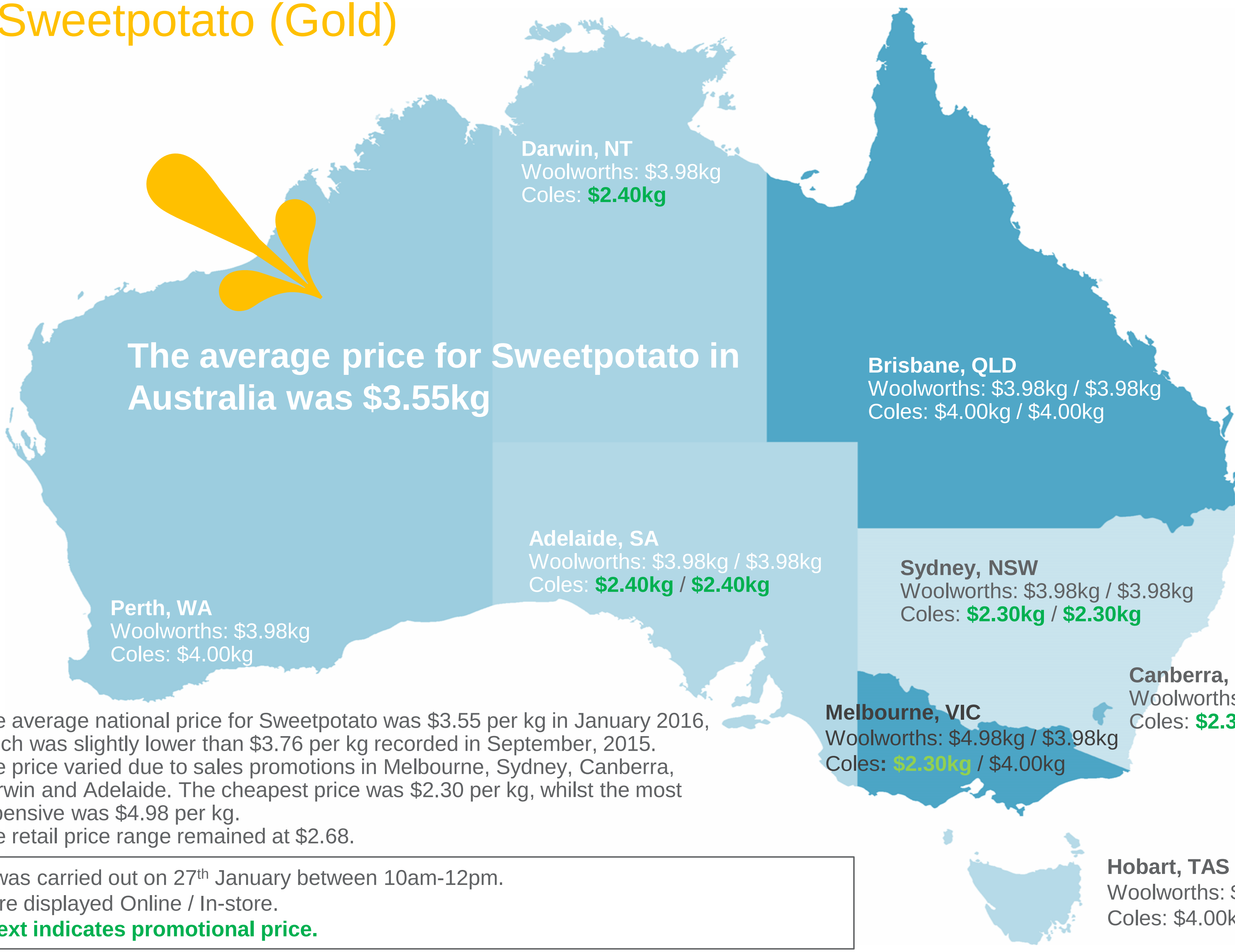
The majority of consumers are purchasing individual sweetpotatoes. There has been an increase in popularity of pre-packaged sweetpotatoes in small trays.



Q4b. In what fresh formats do you typically purchase Sweetpotato?
Sample Wave 24 N=307, Wave 28 N=206, Wave 32 N=202

Online and In-store Commodity Prices

Sweetpotato (Gold)

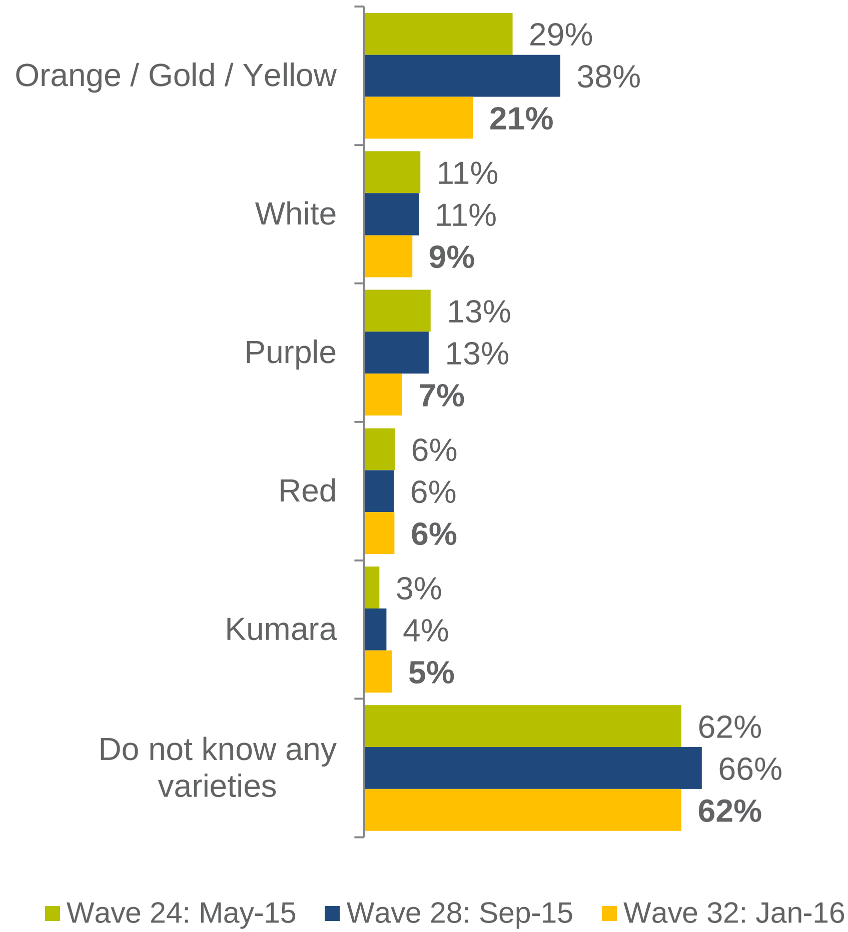


- The average national price for Sweetpotato was $3.55 per kg in January 2016, which was slightly lower than $3.76 per kg recorded in September, 2015.
- The price varied due to sales promotions in Melbourne, Sydney, Canberra, Darwin and Adelaide. The cheapest price was $2.30 per kg, whilst the most expensive was $4.98 per kg.
- The retail price range remained at $2.68.

Pricing was carried out on 27th January between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates promotional price.

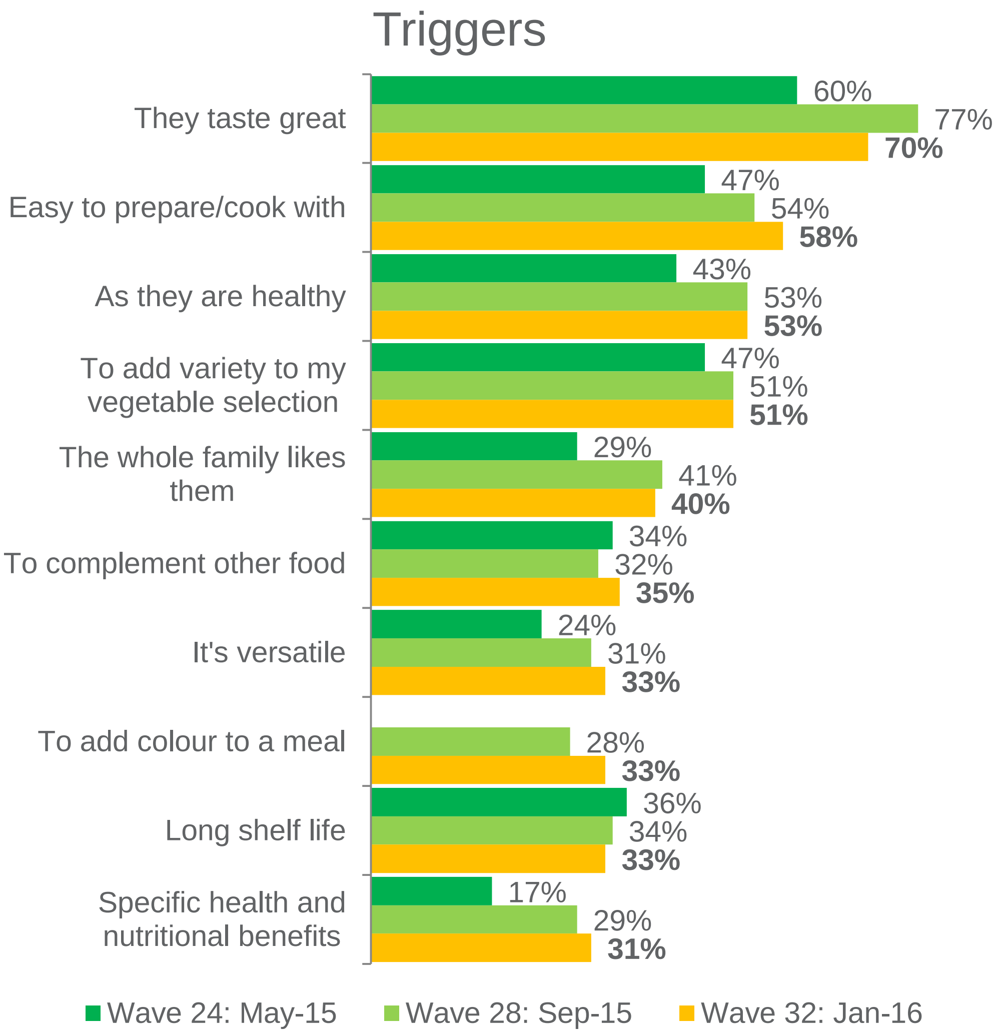
Just under two thirds of consumers are unable to recall a type of sweetpotato.

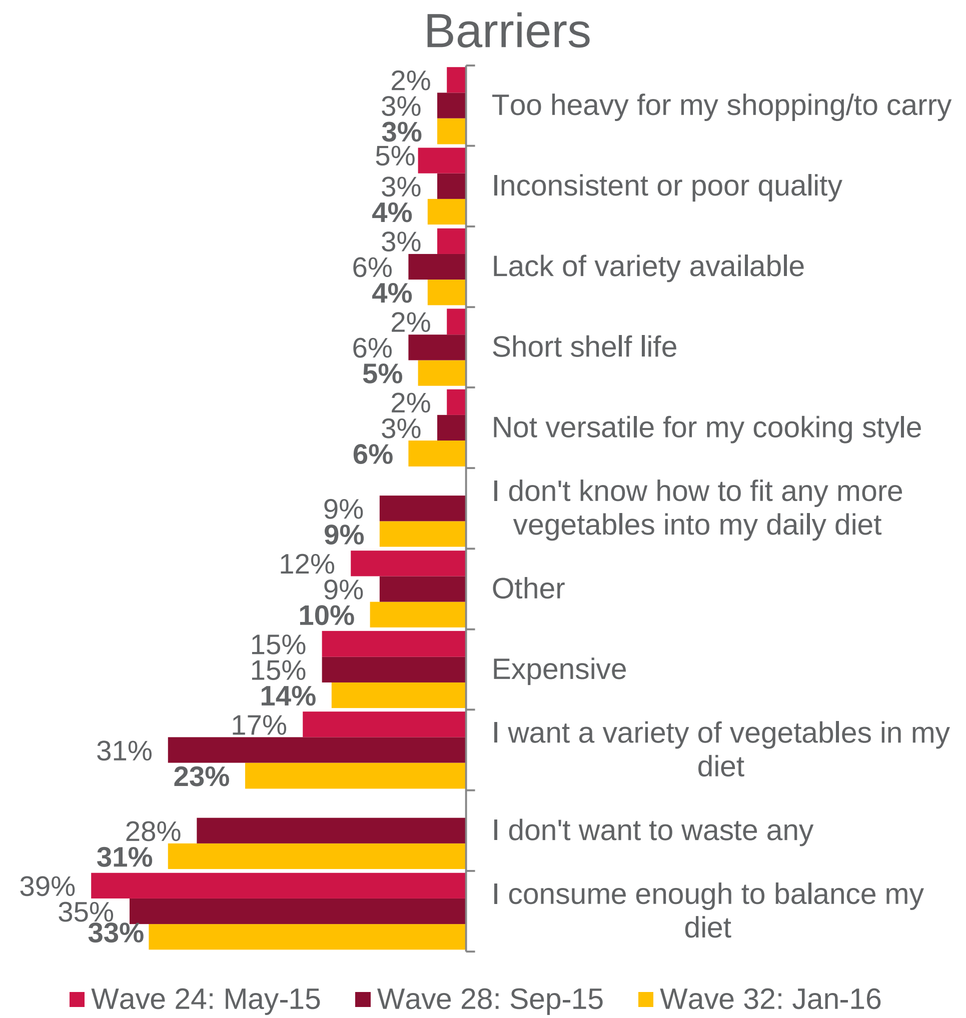
The orange/gold/yellow sweetpotato has the greatest awareness, followed by the white variety.



Q6a. What varieties of <commodity> are you aware of? (unprompted)
Sample Wave 24 N=307, Wave 28 N=206, Wave 32 N=202

Taste, ease of preparation and health remain the key drivers for sweetpotato purchases. Already consuming enough and not wanting to waste any are the key barriers to purchase.





Q7. Which of the following reasons best describes why you purchase <commodity> ?
Q8. Which reason best describes why you don't buy <commodity> more often?
Sample Wave 24 N=307, Wave 28 N=206, Wave 32 N=202

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colmar brunton.

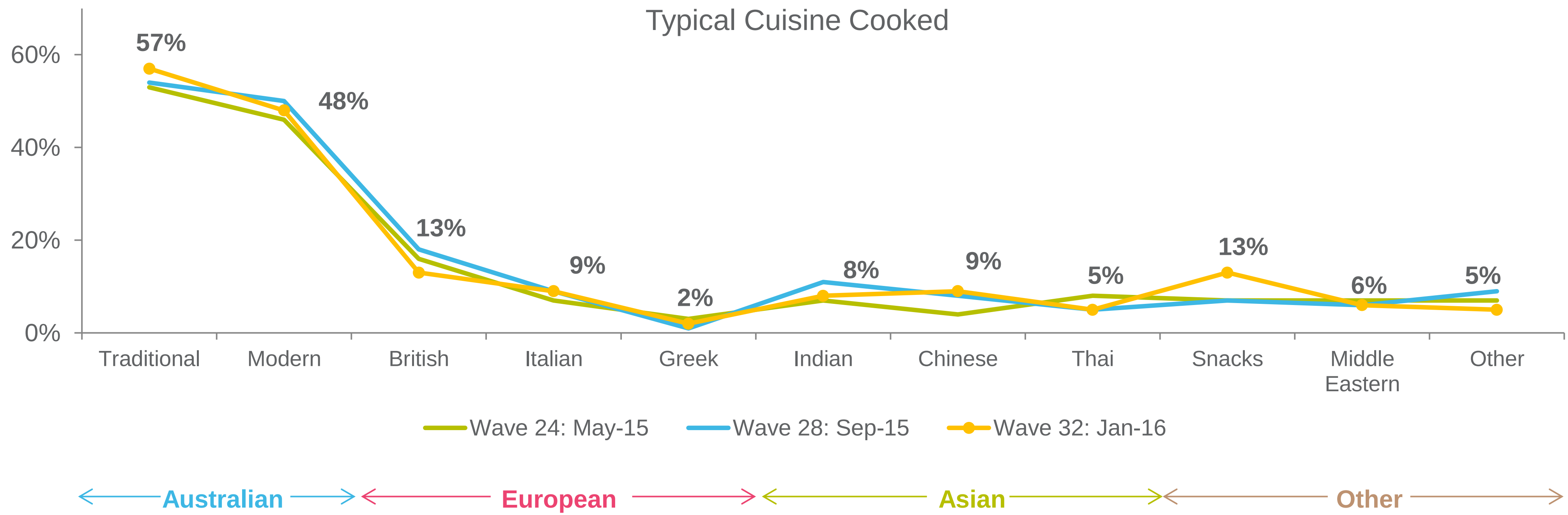
Sweetpotato cooking remains heavily skewed towards Australian cuisines. However, there has been an increase in snacks being cooked with sweetpotato.

Top 5 Consumption Occasions

	Wave 28	Wave 32
Family Meals	68%	**68%**
Dinner	73%	**65%**
Weekday Meals	41%	**43%**
Weekend Meals	38%	**35%**
Quick Meals	17%	**30%**

12% used sweet-potatoes when cooking a new recipe

▼ 9%, Wave 28



Q10. What cuisines do you cook/consume that use <commodity> ?
Q11. Which of the following occasions do you typically consume/use <commodity> ?
Sample Wave 24 N=307, Wave 28 N=206, Wave 32 N=202

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

Consistent with previous waves, consumers prefer to roast, mash and bake sweetpotatoes. Microwaving has consistently increased in popularity over the last three waves. Sweetpotatoes are generally served with potatoes, carrots and broccoli.

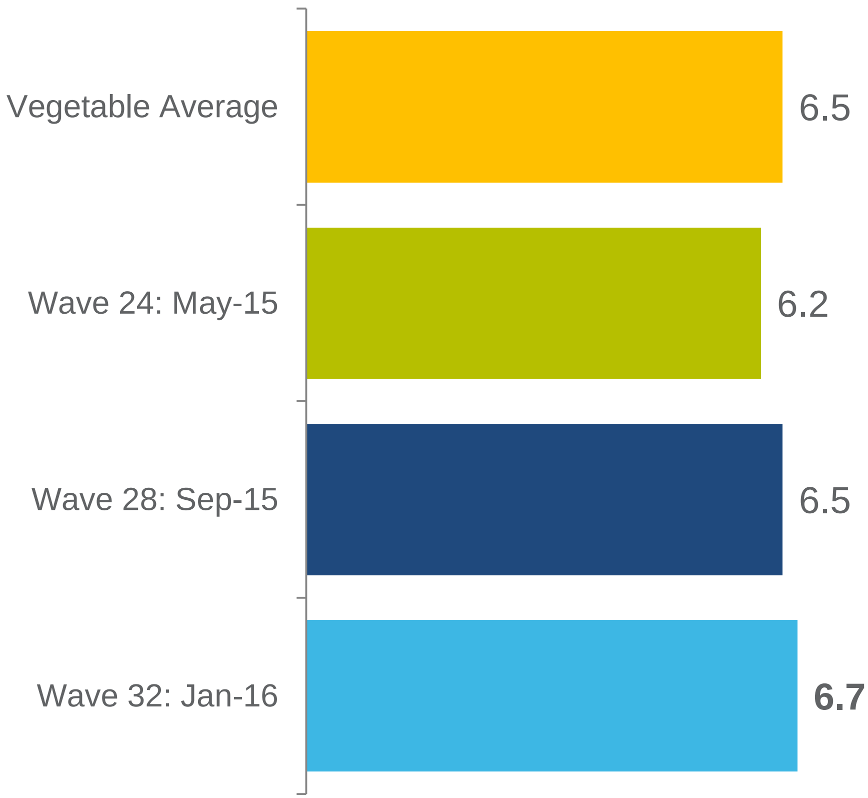
Accompanying Vegetables

Potatoes	51% ▲
Carrots	49% ▼
Broccoli	44% ▼
Pumpkin	33% ▼
Onions	30% ▼

Top Cooking Styles			
	Wave 24	Wave 28	**Wave 32**
Roasting	56%	70%	**64%**
Mashing	49%	50%	**50%**
Baking	43%	43%	**39%**
Boiling	33%	33%	**32%**
Steaming	25%	26%	**26%**
Microwave	12%	15%	**20%**
Soup	26%	26%	**18%**
Slow Cooking	13%	16%	**17%**
Frying	8%	17%	**13%**
Stir frying	7%	11%	**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 24 N=307, Wave 28 N=206, Wave 32 N=202

Importance of sweetpotato provenance has slightly increased and sits just above the Vegetable Average.



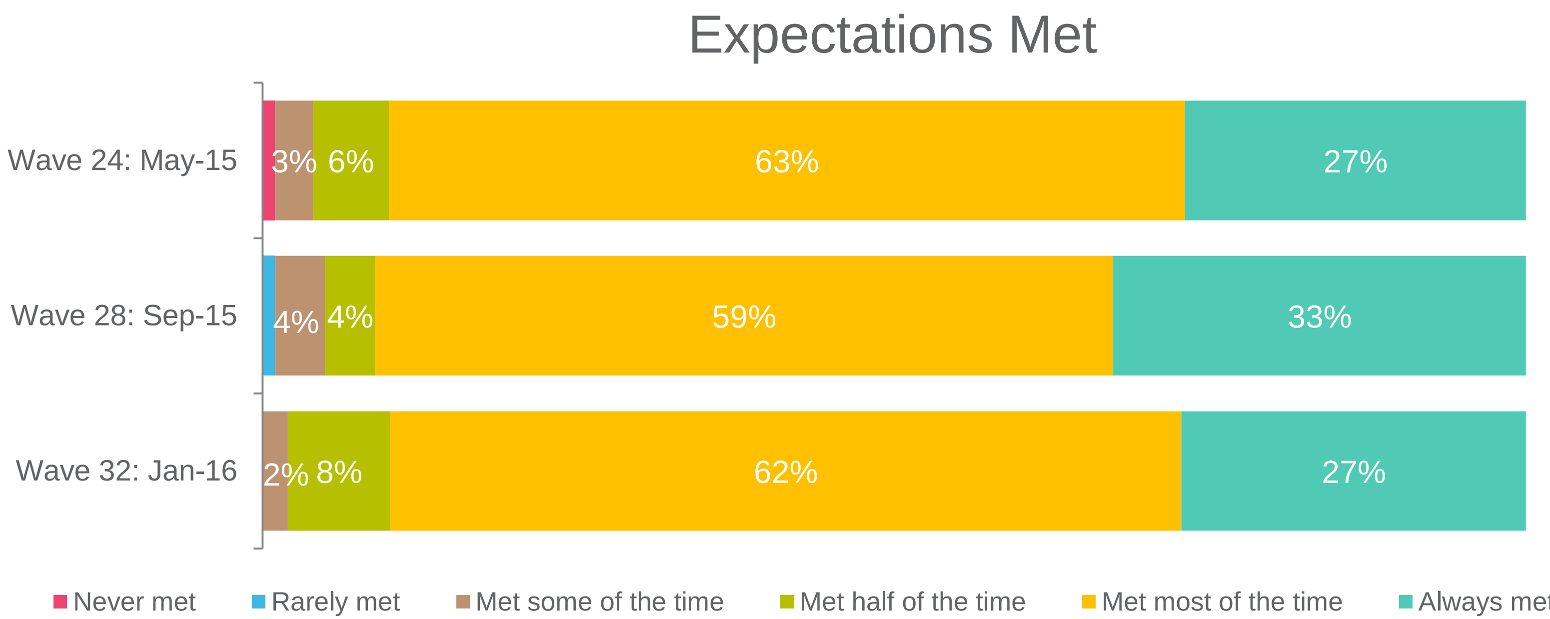
8.0

Q14. When purchasing <commodity>, how important is Provenance to you?
Mean scores out of 10.
Sample Wave 24 N=307, Wave 28 N=206, Wave 32 N=202

Sweetpotatoes are expected to stay fresh for just under two weeks, which has been declining over the last three waves. However, these expectations are being met at least most of the time.

Expected to stay fresh for **12.5** days

▲13.9 days, Wave 24
▲13.1 days, Wave 28



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 24 N=307, Wave 28 N=206, Wave 32 N=202

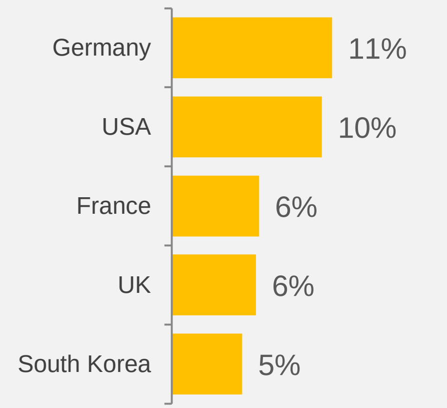
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Trends: Sweetpotatoes.

Sweetpotato Global NPDs
November 2015 – January 2016

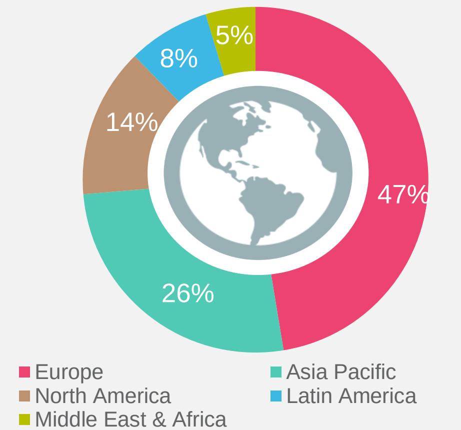
There were 2426 global launches over the past three months that contained Sweetpotato as an ingredient, substantially higher than the previous wave (1604). These were predominantly launched in Europe and Asia Pacific, particularly in Germany and USA. Key categories for launches were skincare, bakery and snack items.

Country

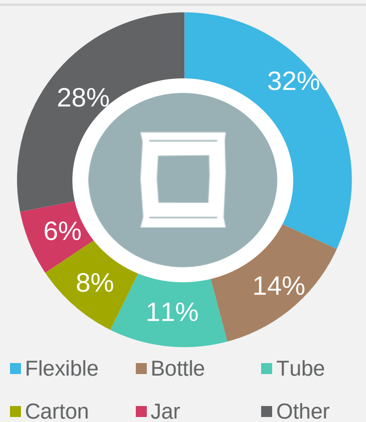


2426 Global Launches

Region



Top Pack Formats



Categories

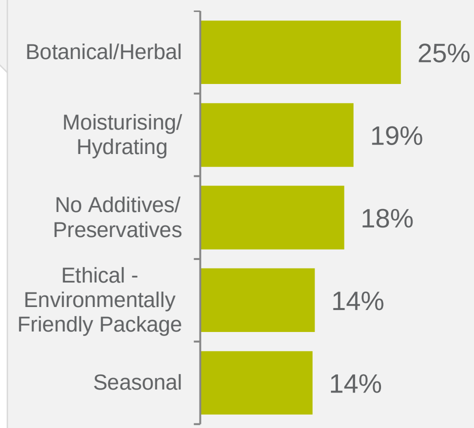
Skincare 20%

Bakery 12%

Snacks 11%

Chocolate Confectionary 8%

Top Claims

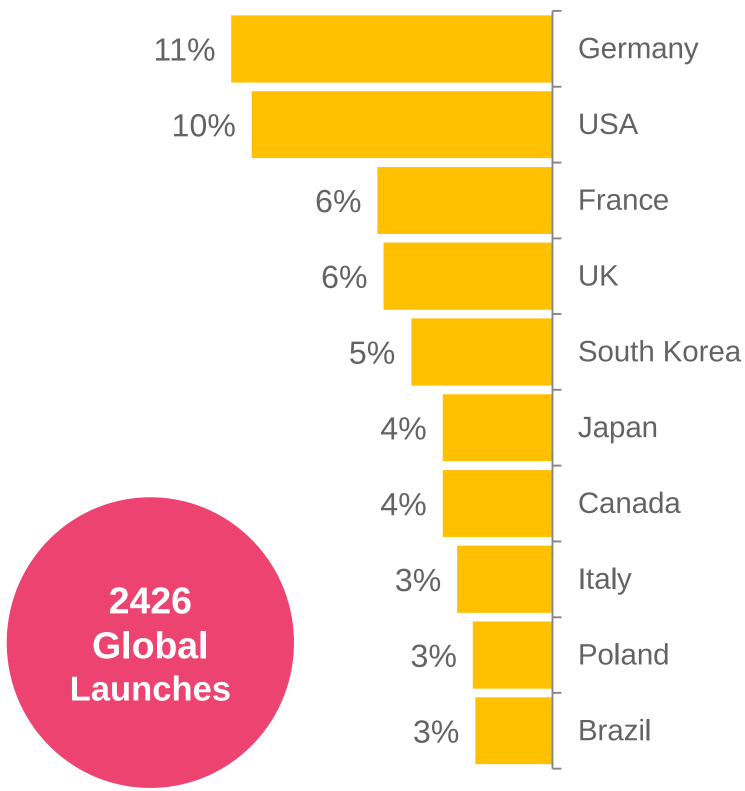


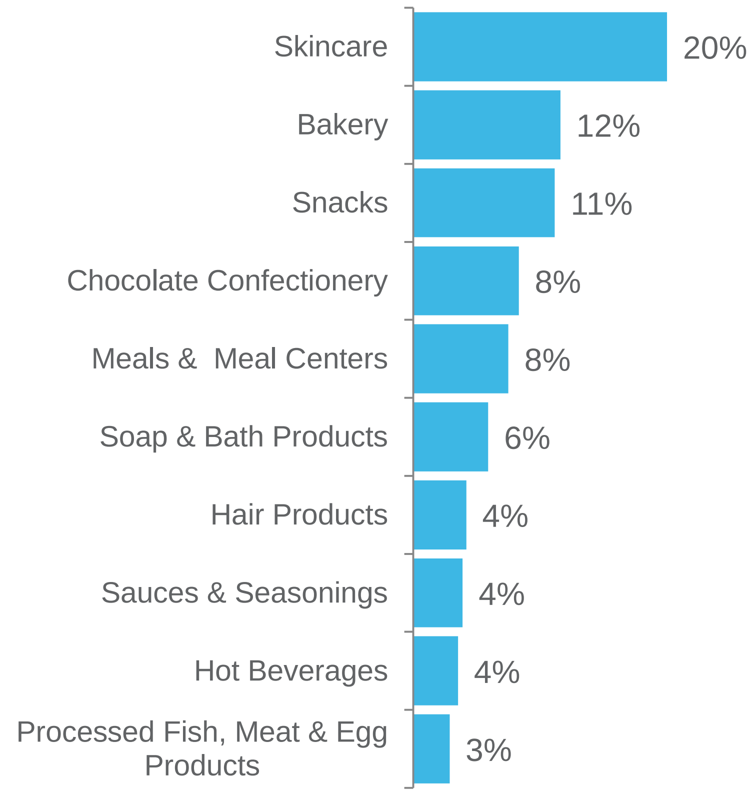
Sweetpotato Product Launches:
Last 3 Months (November 2015 – January 2016)
Summary

- There were 2426 global launches over the past three months that contained Sweetpotato as an ingredient, substantially higher than the previous wave (1604).
- There were 41 products launched in Australia. Products include snacks and dips.
- Products were predominantly launched in Europe (47%) and Asia Pacific (26%).
- The main category launches were skincare (20%), bakery items (12%), and snacks (11%).
- Common pack formats used were flexible packaging (32%), bottles (14%) and tubes (11%).
- Popular claims used on products were botanical/herbal (25%), moisturising/hydrating (19%), and no additives/preservatives (18%).
- The most innovative product launched was a Sweetpotato Slimming Latte in Taiwan. Other examples can be found on the following pages.

Source: Mintel (2016)

Germany and USA had the greatest number of sweetpotato product launches, consistent with the previous wave. The main categories for products were skincare and bakery.





Horticulture Innovation Australia
colmar brunton.

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

Pack Formats Used

Region	Format	%
Global	Flexible	32%
Global	Bottle	14%
Global	Tube	11%
Europe	Flexible	31%
Europe	Bottle	15%
Europe	Tube	13%
Asia Pacific	Flexible	34%
Asia Pacific	Bottle	13%
Asia Pacific	Flexible Sachet	8%

Top Claims Used

Region	Claim	%
Global	Botanical/Herbal	25%
Global	Moisturising/Hydrating	19%
Global	No Additives/Preservatives	18%
Europe	Botanical/Herbal	27%
Europe	Moisturising / Hydrating	20%
Europe	Seasonal	19%
Asia Pacific	No Additives/Preservatives	21%
Asia Pacific	Botanical/Herbal	21%
Asia Pacific	Moisturising / Hydrating	14%

Only regions with n >30 are displayed

Innovative Sweetpotato Launches:
L3M (November 2015 – January 2016)

True Milk Oatmeal Sweet Potato Oatmeal Milk (Taiwan)

True Milk Oatmeal Sweet Potato Oatmeal Milk is made with New Zealand milk powder without non-dairy creamer. This product retails in a pack containing eight 40g bags and featuring a QR code.

Claims:
Low/No/Reduced Allergen

M Kitchen Made To Share Crispy Sweet Potato Dippers (UK)

M Kitchen Made To Share Crispy Sweet Potato Dippers comprise moreish slices of sweet potato in a spicy batter coating with a cool soured cream and garlic dip on the side. The vegetarian product has a medium heat, and retails in a 260g partly recyclable pack.

Claims:
Vegetarian, Ethical - Environmentally Friendly Package

M Signature Wm Morrison Chunky Thai Salmon & Prawn Fishcakes (UK)

M Signature Wm Morrison Chunky Thai Salmon & Prawn Fishcakes comprise succulent smoked salmon and sweet prawns with Thai-style spices, green beans, fluffy potato and sweet potato mash, in a golden crisp puffed rice, coriander and chilli crumb. The mild product is suitable for home freezing, and retails in a 290g partly recyclable pack containing two units.

Claims:
Premium, Ethical - Environmentally Friendly Package

Bai Wei Lin / Baiweilin Sweet Potato Snack (China)

Bai Wei Lin / Baiweilin Hong Xin Yu Shu Tiao (Sweet Potato Snack) has been repackaged in a newly designed 250g pack. This product is QS certified.

Claims:
N/A

Source: Mintel (2016)

Innovative Sweetpotato Launches:
L3M (November 2015 – January 2016)

Bittiko Dried Sweet Potato (China)

Bittiko Tian Shu Gan (Dried Sweet Potato) is processed according to a low temperature slow baking technique to promote the original sweetness. It features the following: dietary fibre to maintain intestinal functions; magnesium to aid in metabolism, formation and growth of tissues and bones; and potassium. This low sodium product is free from additives, fat, sugar and sweetener, and retails in a 100g pack.

Claims:
No Additives/Preservatives, Other (Functional), Low/No/Reduced Fat, Low/No/Reduced Sugar, Low/No/Reduced Sodium, Babies & Toddlers (0-4), Digestive (Functional), Bone Health

Nuestros Sabores Batatitas Sweet Potato Chips with Sea Salt (Argentina)

Nuestros Sabores Batatitas Chips de Batatas Fritas con Sal Marina (Sweet Potato Chips with Sea Salt) have been repackaged with an updated design. This natural product contains no gluten, T.A.C.C., cholesterol, trans fat, artificial flavorings, colorings or flavor enhancers. It retails in an 80g pack featuring a QR code, Facebook, Instagram and Twitter logos.

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

True Milk Tea Sweet Potato Slimming Latte (Taiwan)

True Milk Tea Sweet Potato Slimming Latte is low in sugar and contains dietary fiber. This instant milk tea helps provide satiety, and retails in a pack containing 10 x 26g sachets featuring a QR code.

Claims:
Low/No/Reduced Sugar, Time/Speed, High Satiety, Slimming

Ajinomoto Deepfried Sweet Potato & Chicken Gratin in Breadcrumb (Japan)

Ajinomoto Deepfried Sweet Potato & Chicken Gratin in Breadcrumb is described as a slightly sweet containing sweet potato and chicken gratin. It is made with young chicken from the company's contracted farm. The product is said to be environmentally-friendly as it can be defrosted naturally. The microwaveable product retails in a recyclable 88g pack. Launched in autumn 2015. RRP not available.

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

Source: Mintel (2016)

Innovative Sweetpotato Launches:
L3M (November 2015 – January 2016)

Choice L Sweet Potato Hot Dog (South Korea)

Choice L Sweet Potato Hot Dog consists of bread with sweet potato bits and a German style big size premium sausage containing 90% of Korean pork. The big size product is microwavable and retails in a 600g pack containing five 120g units.

Claims:
Microwaveable, Premium

Simply Sprouted Way Better Snacks Sweet Potato Corn Tortilla Chips (Spain)

Simply Sprouted Way Better Snacks Sweet Potato Corn Tortilla Chips are made with chia and quinoa, sprouted ingredients that are said to enhance the absorption of nutrients and aid in digestion. The kosher certified product is free from gluten and GMO, and retails in a 156g pack that bears a QR code.

Claims:
Other (Functional), Kosher, Gluten-Free, Digestive (Functional), Low/No/Reduced Allergen, GMO-Free

Good Goût Sweet Potato & Roasted Pork (Belgium)

Good Goût Sweet Potato & Roasted Pork is now available. It is an organic ready made meal for babies from 6 months old. The product is a purée made with 66% sweet potatoes, carrots, pork, onion and a dash of grapefruit juice. The product is microwavable and retails in a 190g pack featuring the EU Green Leaf and AB Organic Agriculture logos.

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

RW García 3 Seed Sweet Potato Crackers (Canada)

RW García 3 Seed Sweet Potato Crackers are made with non-genetically engineered white corn flour and corn oil or sunflower oil. The kosher certified product is free from trans fat, wheat and gluten. It retails in a 180g pack featuring a QR code.

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

Source: Mintel (2016)

Australian Sweetpotato Launches:
L3M (November 2015 – January 2016)

Harris Farm Markets Imperfect Picks Sweet Potato & Chilli Dip

Maggie Beer Sweet Potato, Pear & Ginger Soup

Red Rock Deli Deli Style Sweet Potato Crisps Naturally Seasoned with Crushed Australian Sea Salt

The Pure Produce Company The Perfect Entertainer Original Dips Pack

Essence Food for the Soul Lemongrass, Lime & Coconut Chicken Sauce

V8 Power Blend Purple Power Veggie and Fruit Juice

Source: Mintel (2016)

In the Media.

General Vegetable News
(November 2015 – January 2016)

- During April 2016, markets across the country will be promoting the importance of local food production with special Boots for Change days featuring boot-themed events and activities.
- Local high school student, Emma Mott, was behind the concept. Shoppers will be asked to pull on a pair of boots to show their support. “In April next year we [will] have Boots for Change month and put it out there for the rest of the country to get involved and hold their own Boots for Change farmers’ market.”
- The project is also about encouraging young people to take up a career in agriculture or to stay on the family farm. It received $10,000 of funding from the Foundation for Rural and Regional Renewal, and the Australian Farmers’ Markets Association.

www.abc.net.au

Commodity News
(November 2015 – January 2016)

- The Northern Territory Government has earmarked 22,000 hectares in the south of Katherine to be turned into farm land, as part of a four-year study to identify new land for cropping.
- "Those soil types will be suitable for anything from Asian vegetables to melons, nut crops, broadacre crops and perhaps even rice," said Primary Industry Minister Willem Westra van Holthe.

www.abc.net.au

- South Australia's horticulture industry is going from strength to strength, with farmgate values reaching $1 billion in 2014-15.
- Horticulture Coalition of SA president Susie Green said the industry contributed $16.4 billion to the state's overall food value.
- The top SA horticulture crops in 2015-16 by farmgate value are almonds, tomatoes, potatoes, capsicum and citrus.

www.stockandland.com.au

- The latest food trend comes in the form of Brussels sprouts. Brussels sprouts have been popping up on menus nationwide for many months now.
- But as more chefs discover Brussels sprouts, expect their popularity to continue to climb.
- Roasted Brussels sprouts are very popular right now, with restaurants also 'flash frying' the leaves, which crisp them up to serve like chips with dips.

www.pressherald.com/

- US company Fresh Express Inc. is recalling 350 cases of Fresh Express Baby Spinach after a piece of almond was found in the production supply.
- The recalled bagged spinach could present an allergen risk to people who have sensitivities to tree nuts.

www.foodsafetynews.com

Commodity News
(November 2015 – January 2016)

- Vegetable-based desserts are predicted to become one of the latest trends in 2016.
- The restaurant Grain Store in London's King's Cross, has created a parsnip and white chocolate cream dessert.
- "We're already well acquainted with carrot cakes, but savoury pudding flavours are set to become more sophisticated" says Matt Hill, head chef at Down Hall hotel in Hertfordshire.

www.independent.co.uk

- To commemorate the 100th anniversary of the box of assorted chocolates, Cadbury is experimenting with new flavours.
- The company has come up with a kale chocolate dome – among other prototypes to lure more diet-conscious shoppers. This includes a beetroot jelly barrel and a chocolate boasting a double hit of wasabi.

www.goodfood.com.au

- A study has found that sweet potatoes are so rich in carotenoids and β-carotenes, it could be used to ease vitamin A deficiency amongst malnourished populations in developed countries.
- The finding of this vegetable's properties presents a plant-based approach to address a problem that blights Africa and South-East Asia. In 2011, the World Health Organisation (WHO) reported that vitamin A deficiency (VAD) affects around 190 million preschool-aged children and 19 million pregnant women in these regions.

www.nutraingredients.com

Project Harvest Background & Methodology.

Background & Setting the Scene.

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

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

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

This wave's report (Wave 32, January 2016) focuses on:

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

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

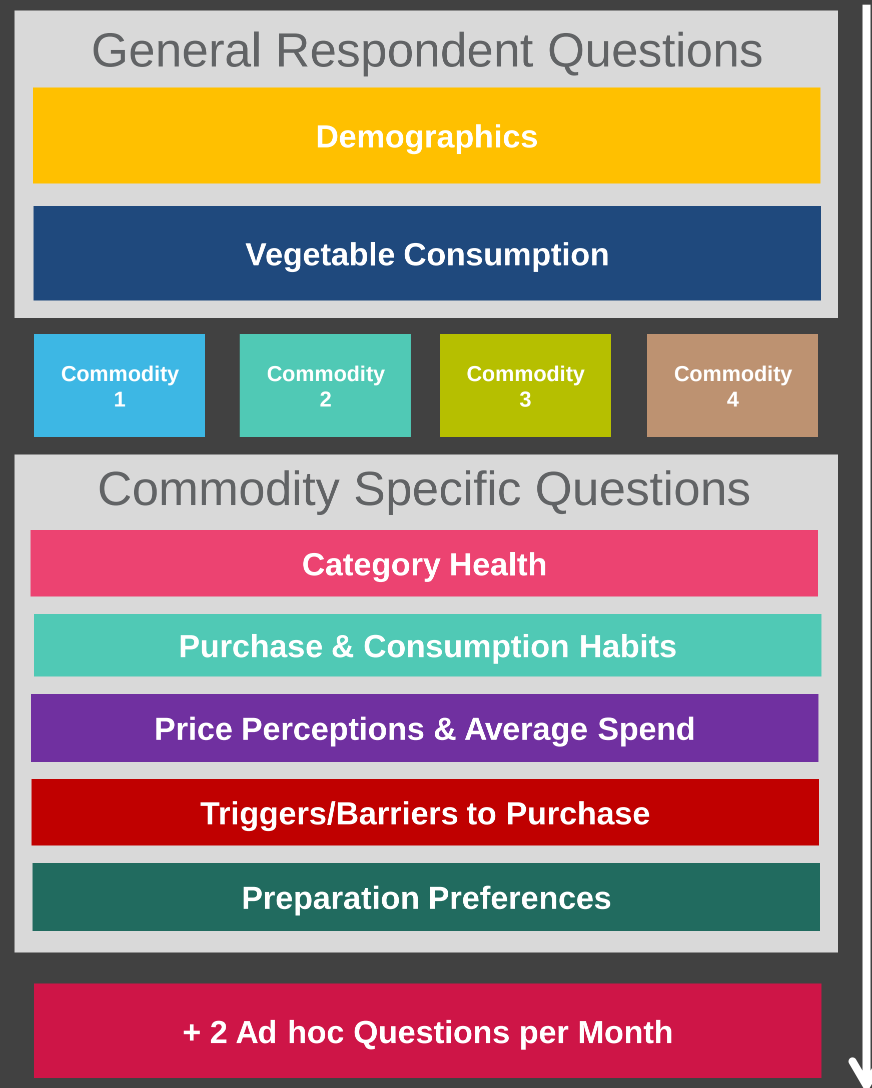
This project has been funded by Horticulture Innovation Australia Ltd using the vegetable levy and matched funds from the Australian Government.

Horticulture Innovation Australia

colmar brunton.

Online Methodology.

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



Sample.

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

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

To qualify for the questionnaire, respondents...

- ⇛ Were aged 18 years and over
- ⇛ Purchased fresh vegetables at least once a month
- ⇛ Purchased at least one of the monthly commodities (Asian Vegetables, Capsicum, Brussels Sprouts, Spinach, Parsnip, Beetroot and Sweetpotatoes) within the last month
- ⇛ Were the main or joint grocery buyer.

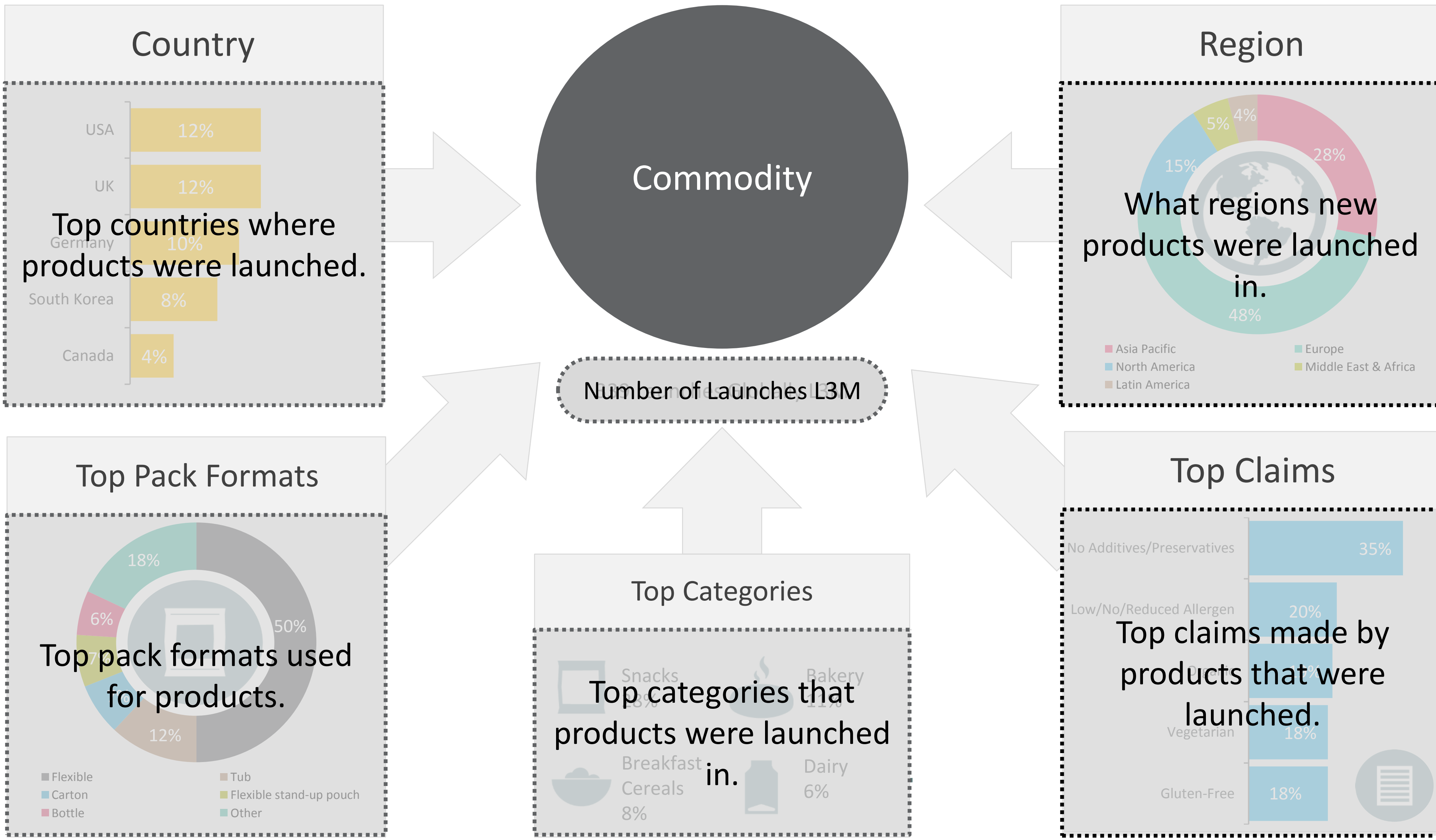
	Asian Vegetables n=303	Capsicum n=308	Brussels Sprouts n=231	Spinach n=305	Parsnip n=206	Beetroot n=207	Sweetpotatoes n=202
Gender							
Male	34%	33%	45%	27%	42%	45%	34%
Female	66%	67%	55%	73%	58%	55%	66%
Age							
18-24 y.o.	11%	6%	5%	10%	1%	2%	6%
25-34 y.o.	21%	19%	13%	25%	10%	14%	14%
35-44 y.o.	15%	17%	13%	18%	12%	17%	15%
45-54 y.o.	18%	20%	20%	18%	20%	24%	20%
55-64 y.o.	18%	20%	21%	16%	33%	23%	24%
65+ y.o.	17%	18%	29%	12%	24%	19%	20%
Household							
Single Income no Kids	21%	24%	23%	27%	20%	15%	20%
Double Income no Kids	22%	17%	16%	21%	14%	18%	19%
Young Families	17%	15%	10%	16%	11%	14%	13%
Established Families	22%	27%	24%	23%	17%	22%	22%
Empty Nesters	17%	18%	27%	13%	38%	31%	26%
Location							
New South Wales	22%	23%	23%	17%	20%	19%	20%
Victoria	19%	21%	20%	18%	29%	19%	24%
South Australia	15%	14%	19%	17%	17%	18%	18%
Queensland	20%	19%	25%	20%	14%	18%	15%
Western Australia	16%	16%	10%	21%	13%	13%	15%
Tasmania	3%	3%	2%	4%	6%	7%	4%
Australian Capital Territory	4%	4%	1%	3%	1%	5%	2%
Northern Territory	0%	0%	0%	0%	0%	0%	1%

Trends Research: Our Approach

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

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

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



Thanks.