Project Harvest Monthly Tracker Report.

Wave 33, February 2016

Vegetables tracked: Pumpkin, Carrots, Cauliflower, Beans, Baby Broccoli, Parsley & Silverbeet

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

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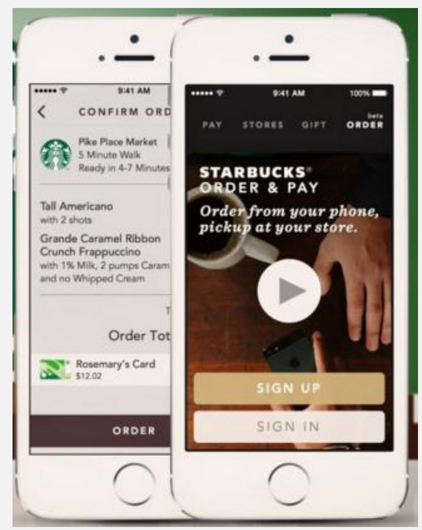
Executive Summary

Industry Insight.

Future possibilities in retail for Australia are exciting and welcome prospects from the perspective of consumers. Retail trends seen in global markets are better meeting consumers' needs of greater convenience, greater value, more personalisation, more information, more authenticity and a better overall experience. It may only be a matter of time until we see similar disruption in traditional channels and ways of distribution here – changes to the supply chain for Aussie vegetable growers and their produce.

Greater convenience

Becoming used to immediate gratification and convenience via the digital world, consumers don't want to wait. In an answer to this, a supermarket in the Philippines has launched QR Code shopping kiosks; Australian cafes have begun to adopt the order-ahead app trialled by Starbucks in the US; Pizza Hut has launched a delivery service that cooks pizza on the go; markets have begun partnering with delivery services; Amazon Fresh launches same-day delivery service; pop up stores continue to generate interest; and stores are going mobile to bring produce to isolated regions.



Industry Insight continued.

Personalisation

The Harvest tracker tell us that over 40% of consumers are interested in some form of pre-prepared or pre-packed vegetables. We have also delved into the growing popularity of meal kits delivery with options such as paleo, low fat, low carb, gluten-free and vegan all being accommodated for. To epitomise this trend, San Francisco is now home to an organic, vegan, GMO-free, gluten free and dairy free fast food drive through.

Authenticity and experience

Retail spaces have come a long way and continue to evolve, blurring the lines between store and food service, and between supermarket and farmers market. Tesco and Waitrose exemplify this in the UK with their grazing areas aside retail aisles – a trend filtering into concept stores in Australia.

Industry Insight continued.

Information
The digital age has made us hungry for information. Stores have begun to go with the trend housing large interactive touch screens, digi-codes on labels and packaging allowing consumers to trace the origin of ingredients, the level of nutrition information available for products has never been greater.

As with food trends, trends in retail are usually trialled by early adopters and spread quickly if successful. Such new and better ways compliment the fresh produce industry based on their aim to get fresh food to consumers faster and to provide personalisation and information to the consumer. Exciting times ahead!

Beans Grower Action Plan.

Wave 33 Fast Facts – Beans

- Beans have a strong level of importance, sitting just above the Vegetable Average.
- Beans are purchased around 4 times per month and are consumed 9 times per month, both slightly higher than the previous wave.
- Consumers purchase 610g of beans per shop. Recalled last spend is $3.10. Overall, consumers perceive beans to be good value for money.
- National price tracking indicated the average price for green beans in February was $5.66 per kg.
- Awareness of bean types have increased for several varieties this wave, but awareness is still low overall. Broad remained the most recalled type of Bean, followed by Green and Runner.
- Beans are expected to stay fresh for just over a week, and freshness expectations are met most of the time.
- Ease of preparing and taste are the main influences on purchase of beans. Already consuming enough and not wanting to waste any are the primary barriers to purchase.

22% of consumers used green beans when cooking a new recipe.

1.

Insight:

Inconsistent or poor quality continues to be a barrier to purchase.

Short Term Recommendation:

Investigate quality issues with beans along the supply chain, especially at point of sale. Recommend optimal storage options to consumers to increase longevity of freshness.

2.

Insight:

Consumers are increasingly eating beans as part of a quick meal.

Long Term Recommendation:

Develop new products that contain beans which meet the need of convenience. Baked goods and snack products are popular overseas including bean cakes and vegetable salad with tuna and pasta.

Carrot Grower Action Plan.

Wave 33 Fast Facts – Carrots

- Importance of carrots was low again this wave, however consumers are satisfied with the range available. Future purchase of carrots looks to remain stable.
- Carrot is purchased approximately 4 times per month. Consumption of carrot occurs 15 occasions per month, around once every second day.
- On average, consumers purchase 1.1kg of carrot. Recalled last spend was $2.30. Overall, consumers perceived very good value for money.
- National price tracking indicated the average price for carrots in February was $2.32 per kg, which was reasonably consistent between state and retailers.
- Awareness of carrot types remains low, with two thirds of consumers unable to recall a type of carrot. Colour is the main trigger for unprompted carrot variety awareness.
- Carrots are expected to remain fresh for over 12 days and generally being met.
- Health and ease of preparation are the key triggers to purchase. The main barriers to future purchase are consuming enough and not wanting to waste any.

7.5/10

Consumers' perceived carrots to be very good value for money.

1.

Insight:

Consumers are moving towards large pre-packaged bags of carrots, with carrots appealing to the whole family.

Short Term Recommendation:

Ensure family friendly sized pre-packaged carrot options are available. As value for money is an important proposition for these consumers who are eating carrots every second day, investigate 'odd bunch' distribution to alternative retail channels.

2.

Insight:

Carrots are perceived to have relatively low importance to consumers and are primarily consumed at dinner time.

Long Term Recommendation:

Make carrots relevant to all meal occasions by re-engaging consumers with the vegetable. Highlight carrots' versatility at point of sale with recipe ideas for breakfast, lunch and snacks.

Cauliflower Grower Action Plan.

Wave 33 Fast Facts – Cauliflower

- Cauliflower holds low importance to consumers and there is little interest in new varieties. The majority of consumers indicate that their purchase of cauliflower will remain stable in the future.
- Purchase of cauliflower occurs 3 times per month and is consumed over 8 times per month. Purchase is typically from mainstream retailers.
- Overall, cauliflower is perceived to be fair value for money (5.9/10). Consumers on average purchase 1.0kg, with recalled last spend at $3.40.
- Price tracking for February 2016 revealed an average price of $5.03 each, significantly higher than in October 2015 ($3.35 each)
- Spontaneous recall remains very low for cauliflower, with over two thirds of consumers unable to name a type.
- Ease of preparation and taste are the strongest triggers to purchase, while already consuming enough and not wanting to waste any are the two biggest barriers.
- Consumers expect cauliflower to remain fresh for eight days, with expectations of freshness largely met.

37% of consumers consumed cauliflower as a 'quick meal'.

1.

Insight:

Consumers find cauliflower easy to prepare. One fifth of consumers are using cauliflower when cooking a new recipe.

Short Term Recommendation:

Provide consumers with new recipe ideas at point of sale and on pack that will appeal to convenience driven and health conscious consumers.

2.

Insight:

This wave sees a noticeable increase in the national price of cauliflower and a subsequent decline in value for money perceptions.

Long Term Recommendation:

Investigate drivers of the recent cauliflower price rise. If limited availability is a key driver, explore future crop expansion. Long term demand for cauliflower appears strong with increased future purchase intent and widespread media coverage.

Pumpkin Grower Action Plan.

Wave 33 Fast Facts – Pumpkin

- Consumers are satisfied with the range of pumpkin available and overall has high levels of consumer sentiment.
- Purchase and consumption frequency of pumpkin both increased, with approximately 9 consumption occasions per month. Purchase is mainly from mainstream and specialist retailers.
- Consumers on average are purchasing 1.3kg of pumpkin. Recalled last spend is $3.20.
- Price tracking revealed a national average of $3.43 per kg for butternut pumpkins, a decrease from prices in October 2015 ($3.76 per kg).
- Awareness of pumpkin remains high, with high recall across multiple types of pumpkin.
- Taste and ease of preparation are the key influences to purchase. Barriers to purchase include already consuming enough for their needs and not wanting to waste any.
- Consumers expect pumpkin to remain fresh for approximately 12 days once purchased. These expectations are being met most of the time.

38% of consumers purchase pumpkin because it cooks quickly.

1.

Insight:

Taste is a key trigger to purchase, and there is also high recall of multiple pumpkin varieties.

Short Term Recommendation:

Ensure pumpkin varieties are well differentiated for consumers. Each variety should have specific flavour and texture profiles as well as suitability for cooking styles and cuisines. This will ensure relevance across all varieties for consumers.

2.

Insight:

New Product Development (NPD) and innovation is low in Australia.

Long Term Recommendation:

There is an opportunity to delivery products that contain pumpkin to consumers. Mashing is a popular cooking style which could be pre-prepared and promoted as a healthier alternative to potatoes. This will appeal to Conscious Improver consumers.

Baby Broccoli Grower Action Plan.

Wave 33 Fast Facts – Baby Broccoli

- There is a high level of endorsement for baby broccoli, with consumers likely to recommend to family and friends. Consumers are also satisfied with the range of Baby Broccoli available.
- Purchase of baby broccoli occurs around 3 times per month and it is consumed 6 times per month. Purchase is typically from mainstream retailers.
- Consumers on average purchase 0.5kg, typically bunched. Recalled last spend is $3.40.
- Price tracking revealed an average price of $2.38 per bunch, slightly lower than the previous wave.
- 85% of consumers were unaware of any varieties of baby broccoli.
- Ease of preparation, health and taste are the strongest triggers to purchase, whilst wanting a variety of vegetables and already consuming enough are the two biggest barriers.
- Consumers expectations of freshness are largely met, consistent with the previous wave.

29% of consumers microwaved their Baby Broccoli.

1.

Insight:

Concern for wastage is limiting purchase of baby broccoli.

Short Term Recommendation:

With the rise of 'stem to root' consumption philosophy, educate consumers about using the whole baby broccoli. Provide cooking instructions and recipe ideas on pack that incorporate the whole vegetable. Describe the flavour profile that the stem will add to a dish.

2.

Insight:

There has been a continual rise in purchase from baby broccoli from specialist retailers.

Long Term Recommendation:

Investigate alternative channels for distribution of baby broccoli outside of mainstream supermarkets. Local distribution is favourable with consumers placing a high importance on Australian provenance of baby broccoli.

Silverbeet Grower Action Plan.

Wave 33 Fast Facts – Silverbeet

- Consumers are somewhat satisfied with silverbeet, sitting in line with the Vegetable Average. One quarter of consumers indicated that they will purchase more in the future, a noticeable increase from the previous wave.
- Purchase of silverbeet occurs around 4 times per month and is consumed 7 times per month. Purchase is typically from mainstream retailers and also specialist retailers.
- Consumers on average are purchasing 0.8kg of silverbeet. Recalled last spend is $3.40, consistent with the previous wave.
- Price tracking for February 2016 showed the national average as $4.28 per bunch for silverbeet, an increase since October 2015.
- Spontaneous awareness for silverbeet is low, with the highest recall for rainbow/coloured/Swiss silverbeet.
- Health, ease and taste are the key influences to purchase. Barriers to purchase included wanting a variety and already consuming enough for their needs.
- Consumers expect silverbeet to remain fresh for six days once purchased, and these expectations are generally met.

23% of consumers grow their own silverbeet.

1.

Insight:

Australian provenance is extremely important to consumers.

Short Term Recommendation:

Ensure all retailers of silverbeet prominently display Australian provenance information. This should encourage growth of the category and maintain consumer satisfaction.

2.

Insight:

Consumers are purchasing silverbeet to add colour to a meal and serving with carrots and pumpkin.

Long Term Recommendation:

Investigate colourful mixed vegetable pre-packaged formats. For example, a mixed vegetable curry pack containing silverbeet and carrots. Ensure pack contains recipe and cooking instructions.

Parsley Grower Action Plan.

Wave 33 Fast Facts – Parsley

- Parsley has strong levels of consumer sentiment across all metrics of importance, satisfaction, endorsement and interest in new varieties, consistent with the previous wave.
- Purchase of parsley occurs nearly 4 times per month and is consumed 11 times per month. Purchase is typically from mainstream and specialist vegetable retailers.
- Consumers on average purchase 0.2kg, typically per bunch. Recalled last spend is $2.70.
- Price tracking revealed an average price of $2.71 per bunch in February 2016, consistent with the previous wave.
- Spontaneous awareness of Parsley noticeably improved this wave, with a much greater number of consumers able to recall Curly Leaf Parsley.
- Using as an ingredient in dishes, complementing other food and taste are the strongest triggers to purchase, while not wanting to waste any and growing their own are the two biggest barriers.
- Consumers expect parsley to remain fresh for just over a week. Expectations of freshness are met most of the time.

17% of consumers typically purchase parsley as a potted plant.

1.

Insight:

Perceptions of longevity of freshness being met has declined over the last three waves.

Short Term Recommendation:

Provide consumers with optimal storage instructions as consumers are using minimal amounts across multiple dishes. Manage expectations by providing best before dates on pack.

2.

Insight:

Globally there is widespread innovation in products that contain parsley, yet minimal activity domestically.

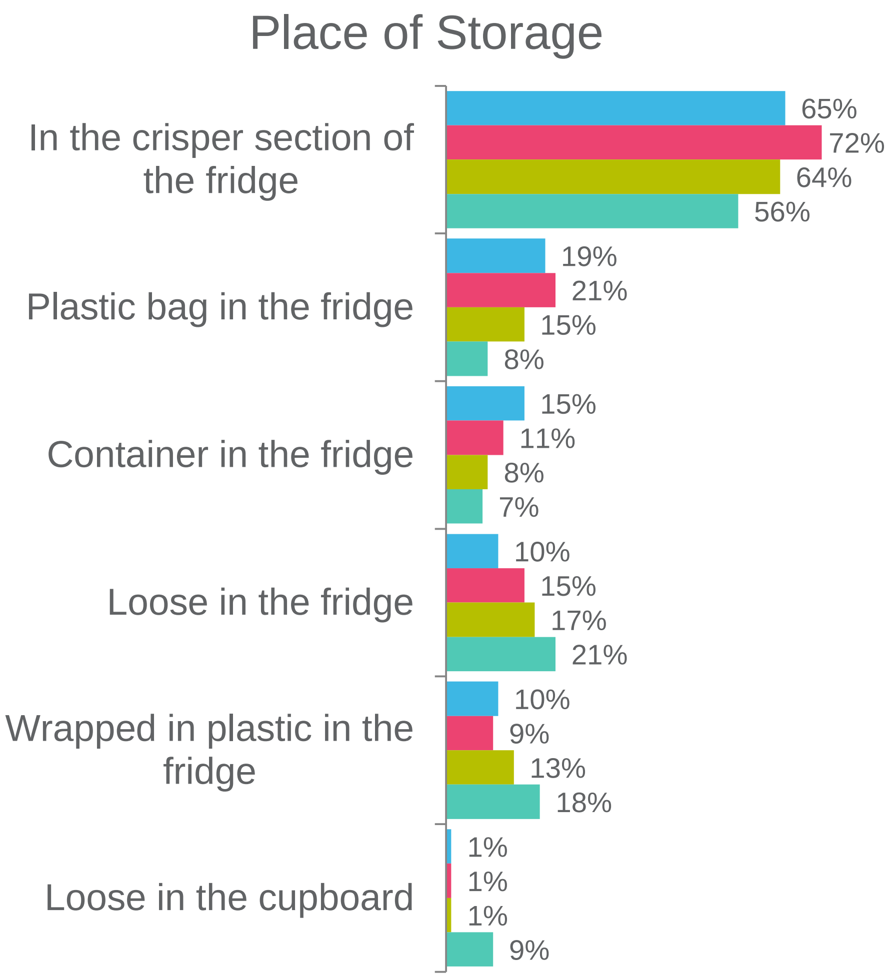
Long Term Recommendation:

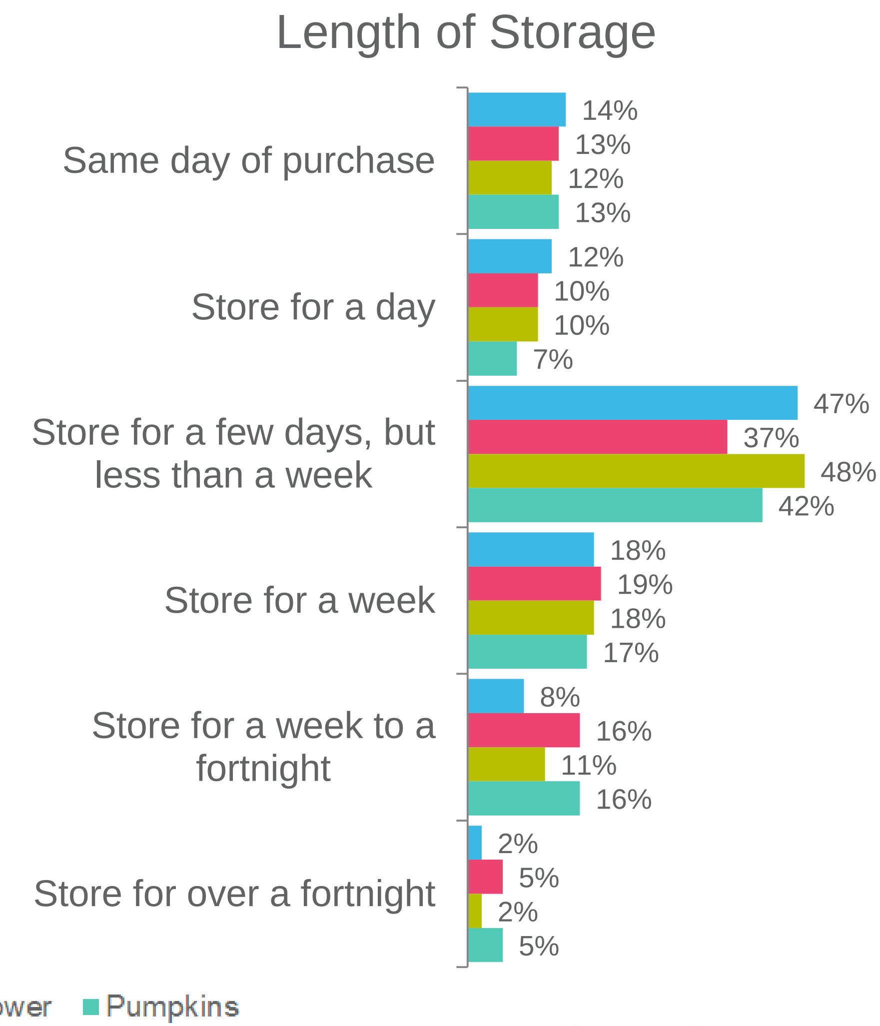
Focus on developing products that have long lasting freshness, reduce wastage and contains multiple serves e.g. freezable herbed flavour cubes, freeze-dried parsley flakes.

Wave 33:
Response to Ad hoc Questions

Vegetable Storage

- The crisper section in the fridge was the main storage area for beans, carrots, cauliflower and pumpkin.
- Compared with the other vegetables, pumpkins were less likely to be refrigerated and more likely to be stored in the cupboard.
- Carrots and pumpkin had the longest storage period, a few days to over a fortnight.





AHQ1. Where do you typically store your vegetables after purchase?
AHQ2. On average, how long to do you store your vegetables before using them?
Total Respondents Min N=574

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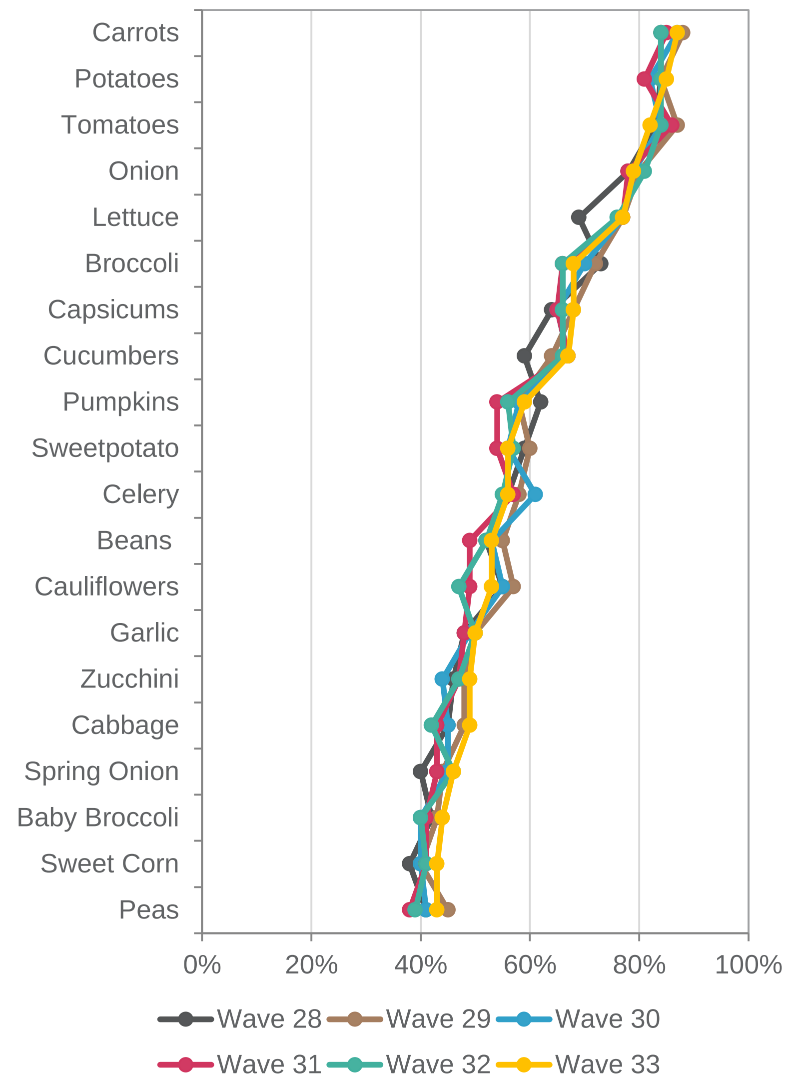
Wave 33: Overall Vegetable Tracking

The top 3 vegetables purchased last month were carrots, potatoes and tomatoes.

This month sees the greatest increase in purchase of cabbage, cauliflower and peas.



Sample Wave 33 N= 865
S8. Which of the following fresh vegetables have you purchased in the last month?

Category Health Explained

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

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

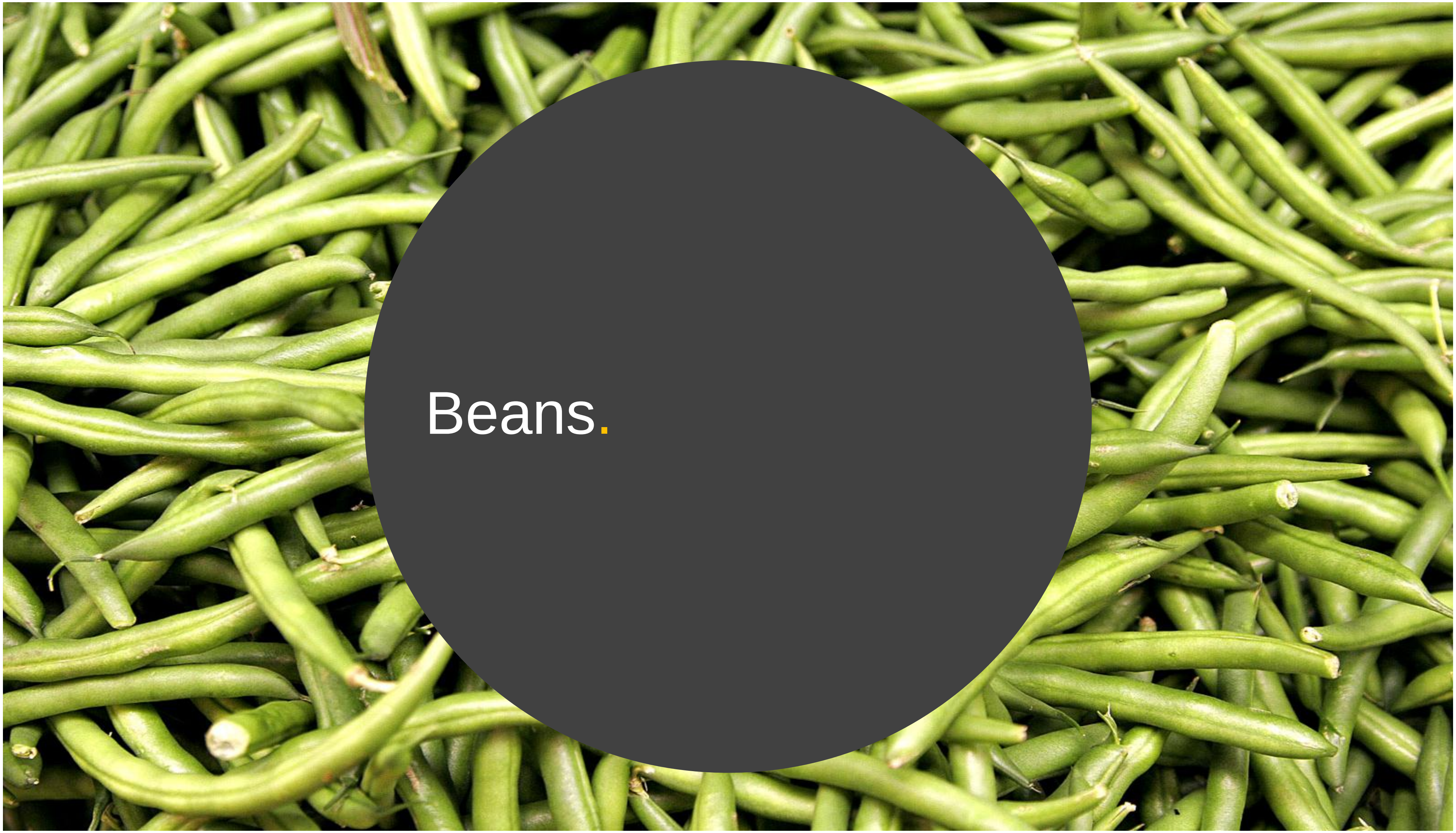
- How **important** to you is having a range of *commodity* available in the store where you usually shop?
- How **satisfied** or dissatisfied are you with the range of *commodity* currently available?
- How likely would you be to **recommend** *commodity* to your family and friends?
- How interested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

Parsley, baby broccoli and silverbeet hold the greatest importance to consumers, whilst they are most satisfied with pumpkin, baby broccoli and carrots.

Consumers are most likely to recommend silverbeet and parsley to their family and friends. In the future, consumers intend to purchase more silverbeet, whilst other vegetable purchase looks to remain stable.

	Beans	Carrots	Cauliflower	Pumpkin	Baby Broccoli	Silverbeet	Parsley	Vegetable Average
Importance	6.5	5.2	5.1	6.6	6.7	6.7	7.0	6.3
Satisfaction	6.1	6.8	6.6	6.8	6.8	6.6	6.7	6.6
Endorsement	6.9	6.9	6.8	7.0	7.0	7.5	7.4	7.0
Interest (New Types)	6.3	5.6	5.8	6.3	6.6	6.9	6.8	6.3
Future Purchase								
More	14%	8%	16%	11%	16%	24%	12%	15%
Same	86%	92%	83%	88%	84%	76%	87%	83%
Less	0%	0%	1%	2%	0%	1%	0%	1%

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



Beans.

Purchase frequency and consumption of beans have slightly increased this wave.

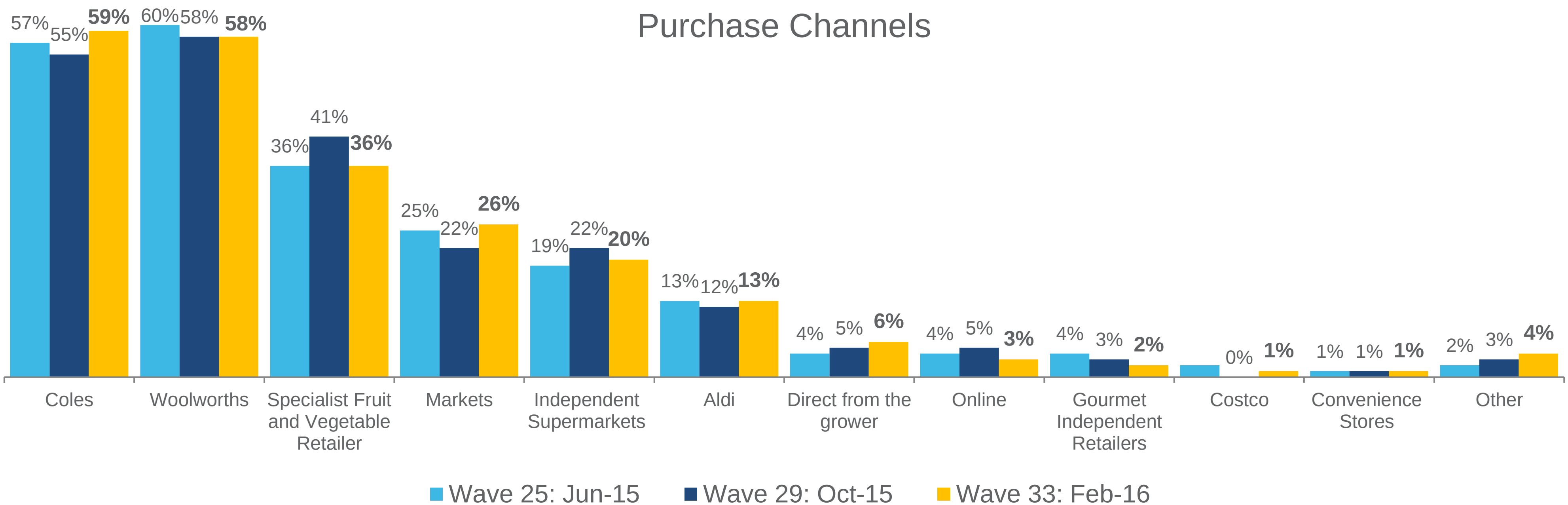
Beans are generally bought through mainstream retailers, with an increase in purchase from markets this wave.

Average Purchase **4.0** times per month

▼ 3.9 times, Wave 25
▼ 3.8 times, Wave 29

Average Consumption **9.1** times per month

▼ 8.7 times, Wave 25
▼ 8.8 times, Wave 29



Q1. On average, how often do you purchase French and runner beans?
Q2. On average, how often do you consume French and runner beans?
Q5. From which of the following channels do you typically purchase French and runner beans?
Sample Wave 25 N=306, Wave 29 N=302, Wave 33 N=301

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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 typical consumer purchases **610g** of beans, which has remained stable this wave.

▲ 660g, Wave 25
— 610g, Wave 29

Recalled last spend

Recalled last spend on bean purchase was **$3.10**, which has continued to trend downwards.

▲ $3.50, Wave 25
▲ $3.40, Wave 29

Value for money

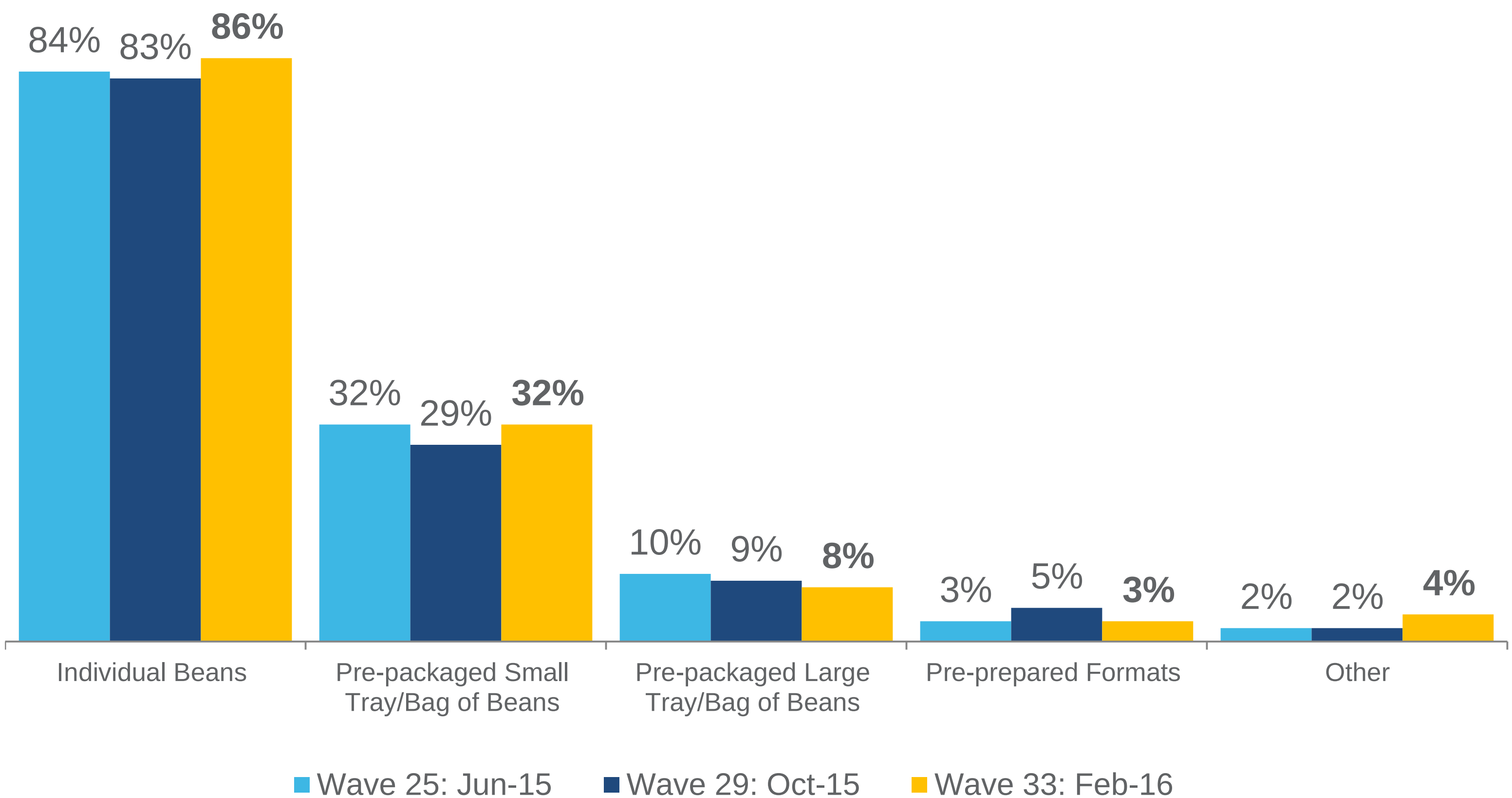
Consumers' perceived value for money is good **(6.3/10)**, even though this is slightly lower than the previous two waves.

▲ 6.4/10, Wave 25
▲ 6.4/10, Wave 29

Q3. How much French and runner beans 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 25 N=306, Wave 29 N=302, Wave 33 N=301

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

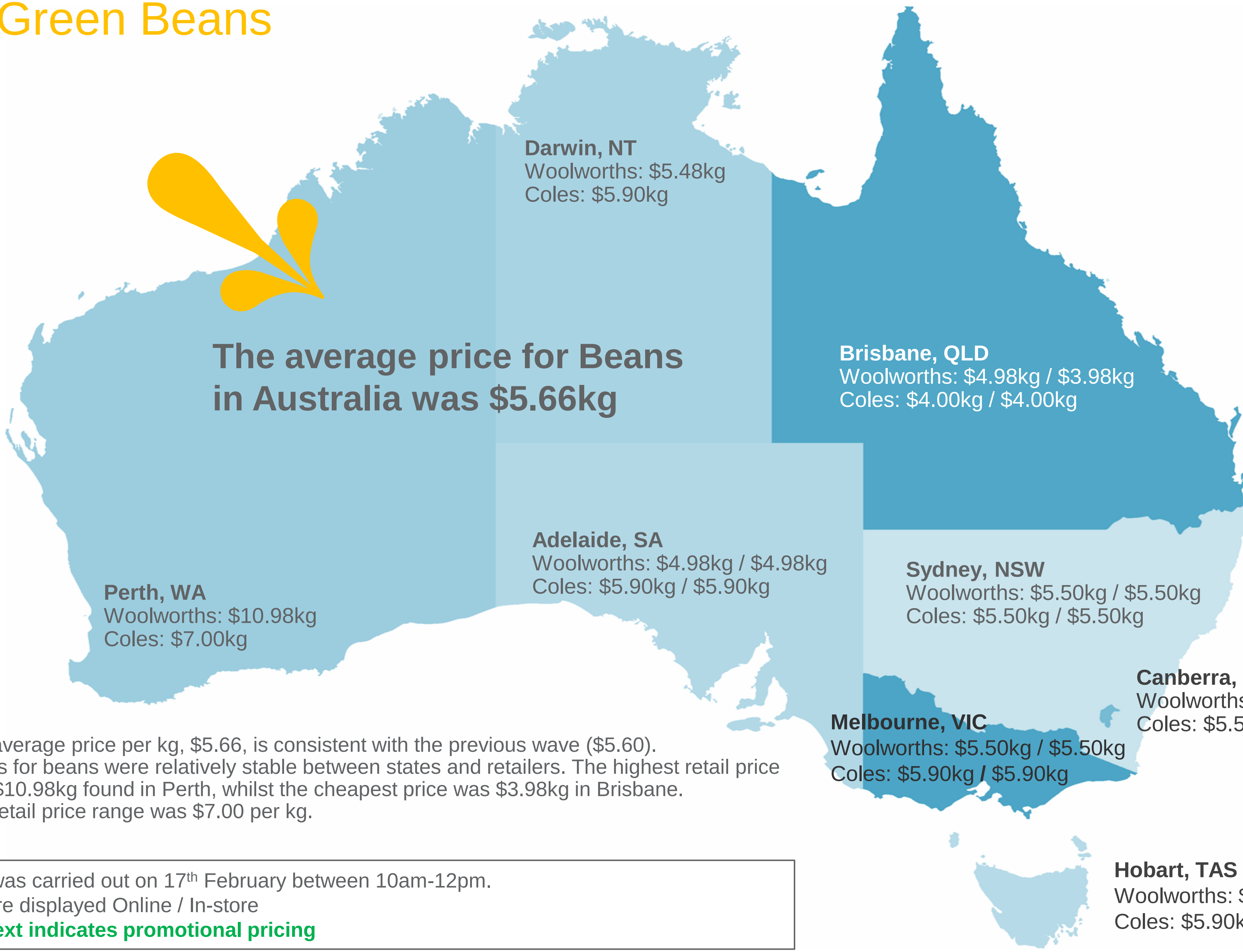
Loose beans remain the most common format purchased, which is consistent with all previous waves.



Q4b. In what fresh formats do you typically purchase Beans?
Sample Wave 25 N=306, Wave 29 N=302, Wave 33 N=301

Online and In-store Commodity Prices

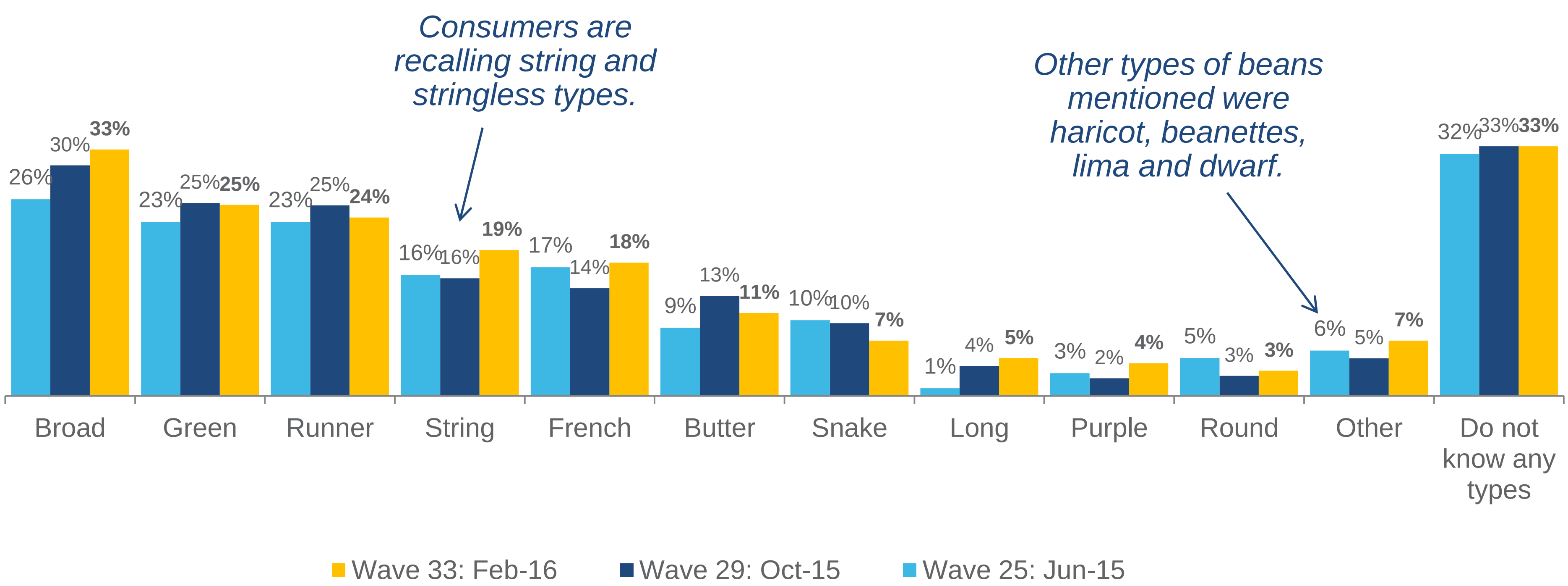
Green Beans



- The average price per kg, $5.66, is consistent with the previous wave ($5.60).
- Prices for beans were relatively stable between states and retailers. The highest retail price was $10.98kg found in Perth, whilst the cheapest price was $3.98kg in Brisbane.
- The retail price range was $7.00 per kg.

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

Broad, green and runner varieties had the greatest level of recall this wave, consistent with previous waves.



Q6a. What varieties/types of French and runner beans are you aware of? (unprompted)
Sample Wave 25 N=306, Wave 29 N=302, Wave 33 N=301

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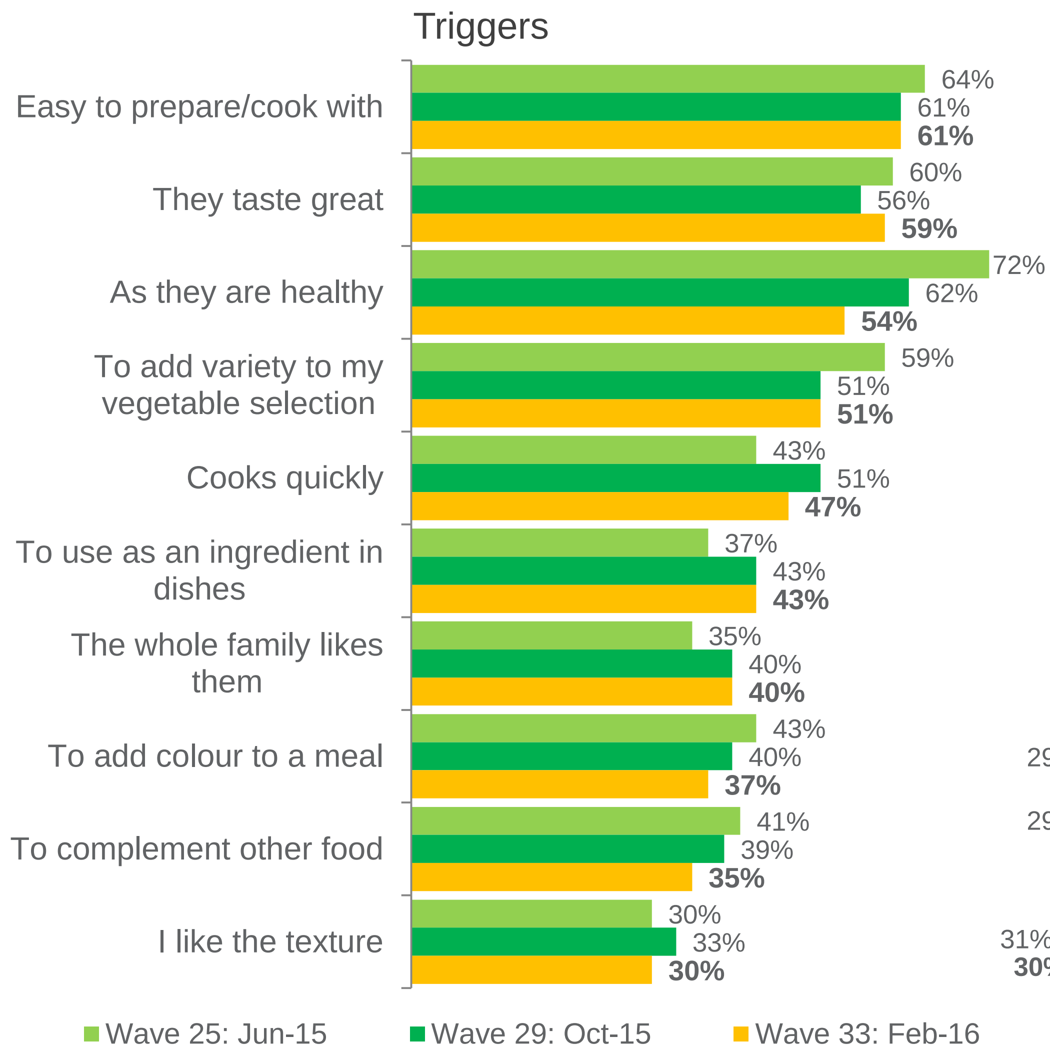
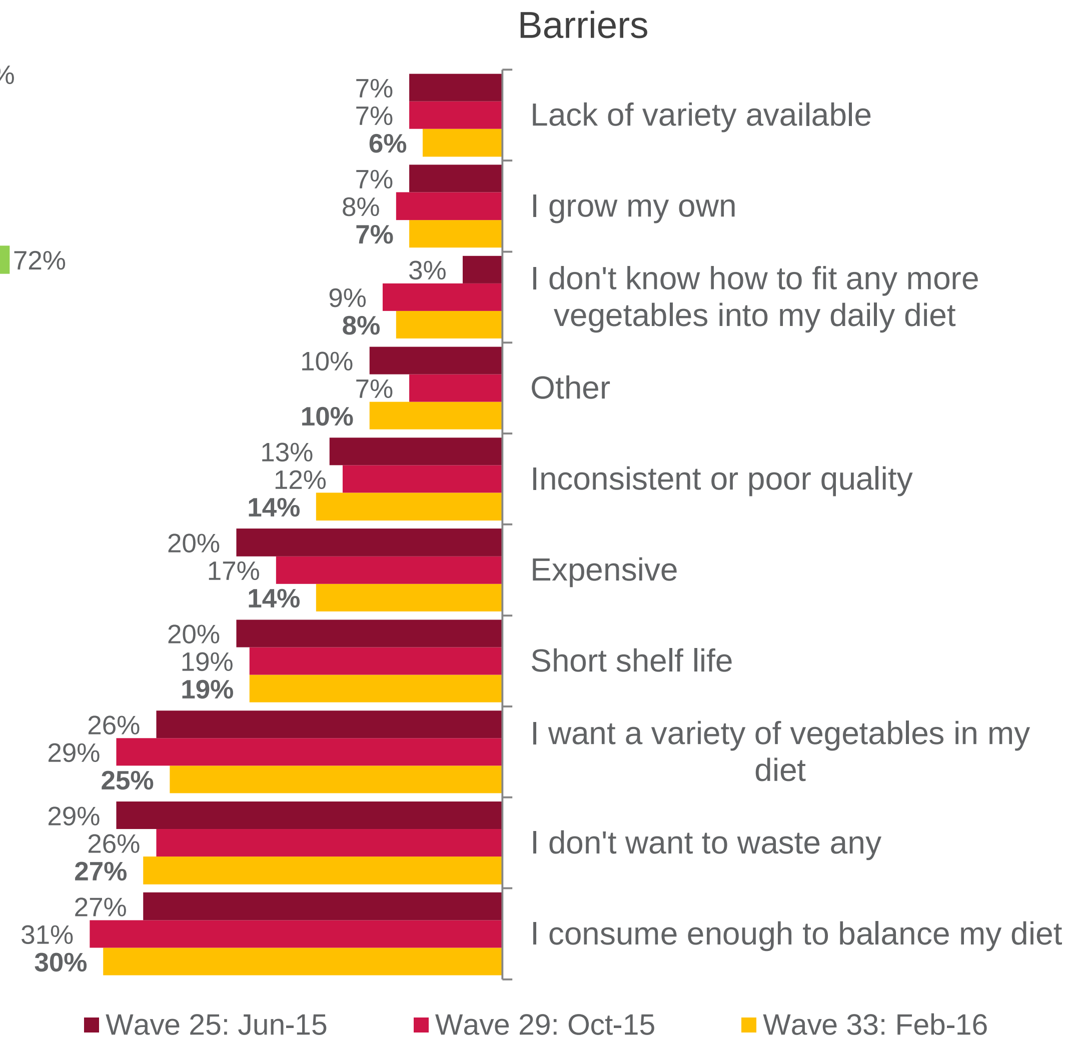
Ease of preparation and taste are the primary motivations to purchasing beans. The main barriers to purchase are already consuming enough for their needs and not wanting to waste any. Expense is continually declining as a barrier that prevents future purchase.





Q7. Which of the following reasons best describes why you purchase French and runner beans?
Q8. Which reason best describes why you don't buy French and runner beans more often?
Sample Wave 25 N=306, Wave 29 N=302, Wave 33 N=301

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Traditional Australian remains the most popular form of cuisine when cooking with beans. This wave sees an increase in Modern Australian, Thai and Indian cuisine.

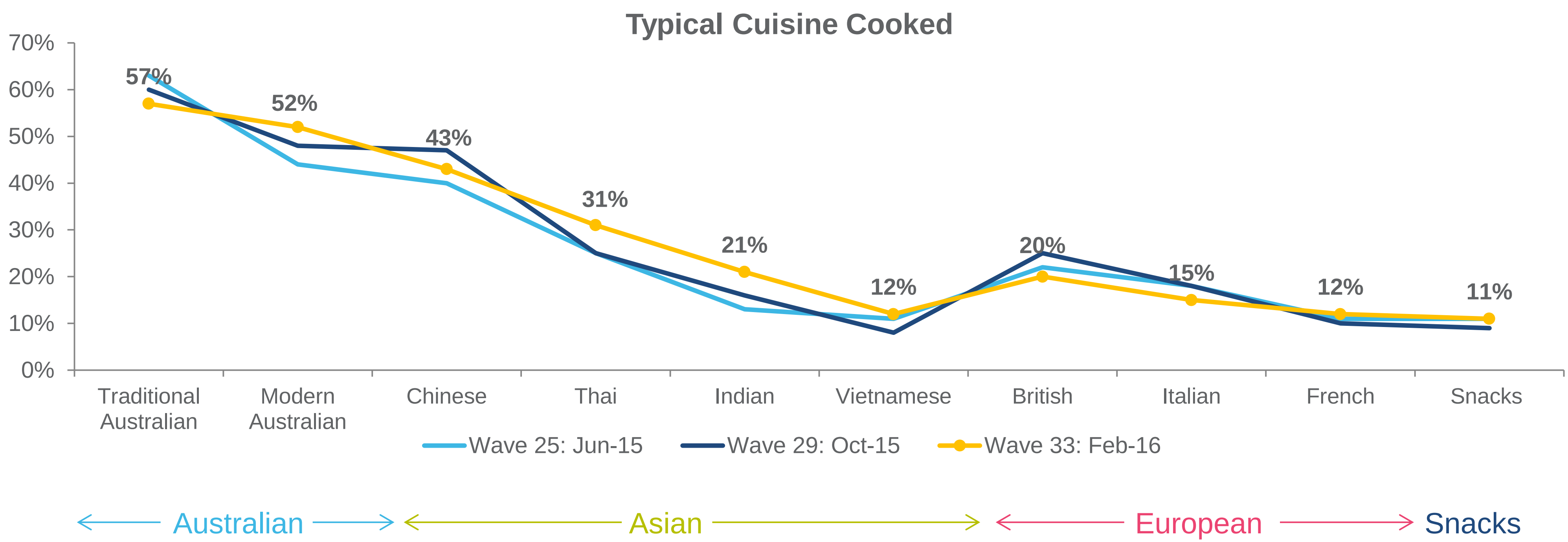
There has been a noticeable increase in beans being consumed as a quick meal.

Top 5 Consumption Occasions

	Wave 29	Wave 33
Dinner	79%	**74%**
Family Meals	69%	**69%**
Weekday Meals	53%	**55%**
Quick Meals	39%	**48%**
Weekend Meals	43%	**43%**

22% used green beans when cooking a new recipe

▼ 15%, Wave 25
▼ 18%, Wave 29



Q10. What cuisines do you cook/consume that use French and runner beans?
Q11. Which of the following occasions do you typically consume/use French and runner beans?
Sample Wave 25 N=306, Wave 29 N=302, Wave 33 N=301

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

Consumers are more likely to serve beans with carrots and potatoes. Steaming and stir-frying remain the key cooking styles. There has also been a steady increase in microwaving across waves.

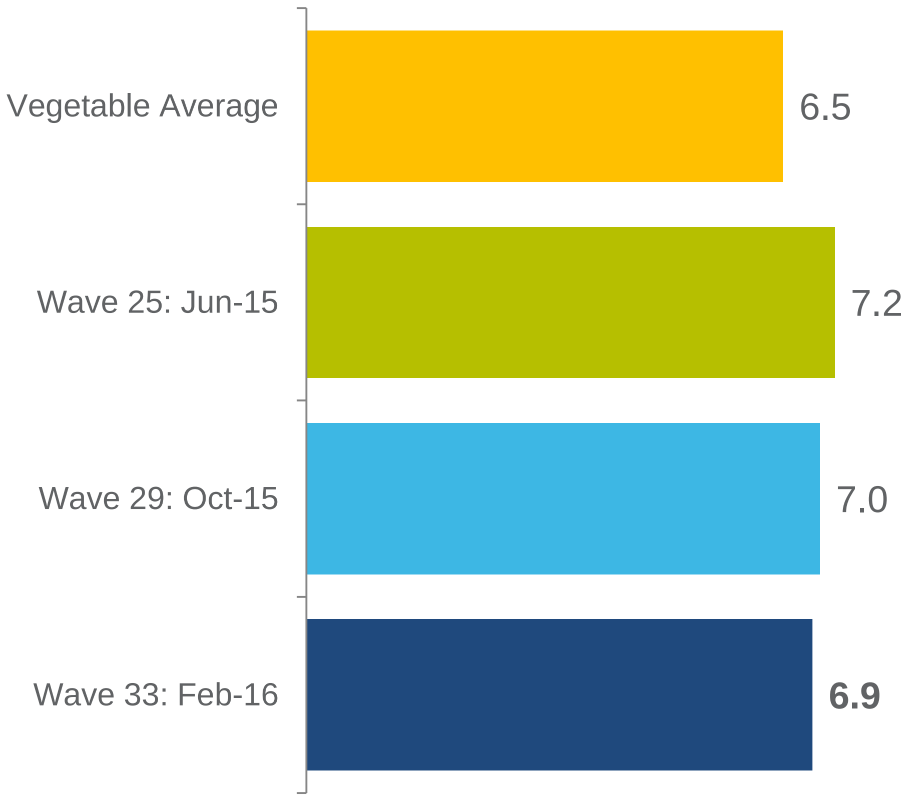
Accompanying Vegetables

Carrot	66% ▲
Potato	62% ▲
Broccoli	38% –
Sweet Potato	36% ▲
Cauliflower	32% ▲

Top 10 Cooking Styles	Wave 25	Wave 29	Wave 33
Steaming	64%	58%	**62%**
Stir frying	50%	55%	**50%**
Boiling	46%	50%	**44%**
Microwave	18%	22%	**23%**
Raw	19%	22%	**20%**
Sautéing	16%	19%	**17%**
Soup	20%	19%	**16%**
Frying	8%	14%	**13%**
Slow Cooking	14%	17%	**13%**
Roasting	3%	8%	**4%**

Q9. How do you typically cook French and runner beans?
Q10a. And when are you serving French and runner beans which of the following do you also serve together with this?
Sample Wave 25 N=306, Wave 29 N=302, Wave 33 N=301

This wave sees a slight decline in the importance of provenance for beans. However, knowing that beans are grown in Australia remains even more important to consumers.



Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 25 N=306, Wave 29 N=302, Wave 33 N=301

Beans are expected to stay fresh for one week once purchased, which is consistent with the previous waves.

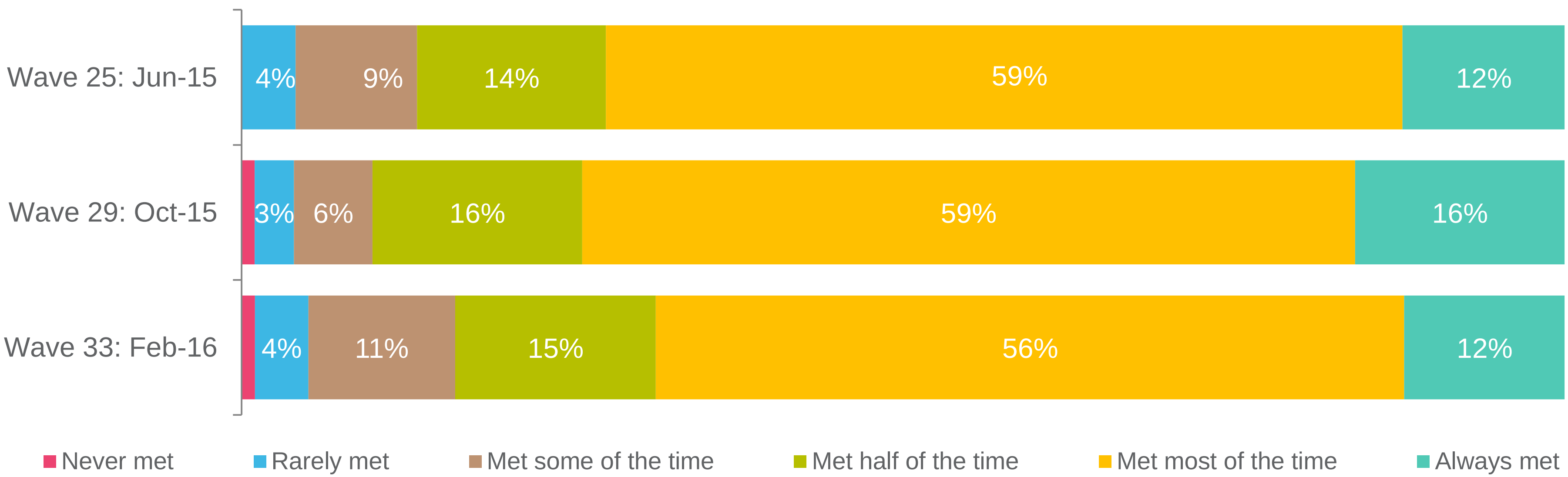
Expectations of freshness have slightly decreased over the past months, but are still met most of the time.

Expected To stay fresh for **7.4** days

▲ 7.6 days, Wave 25

▲ 7.5 days, Wave 29

Expectations Met



Q12. How long do you expect French and runner beans to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy French and runner beans?
Sample Wave 25 N=306, Wave 29 N=302, Wave 33 N=301

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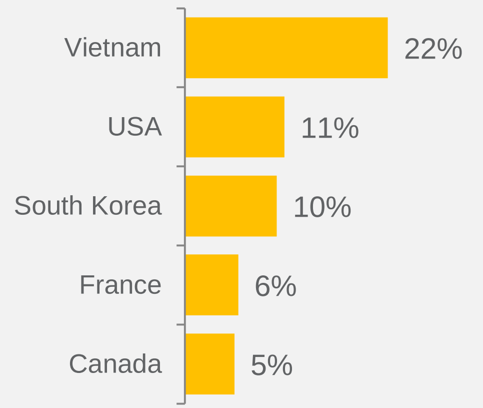
Bean Product Launch Trends.

Bean Global NPDs
December 2015 – February 2016

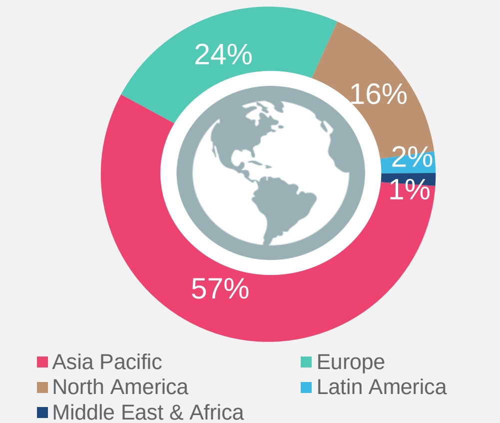
243 products containing green beans were launched globally in the last three months. Asia Pacific was the key region for launches. Baked goods and meals were top categories with preservative free and ease of use claims most commonly used.

Country

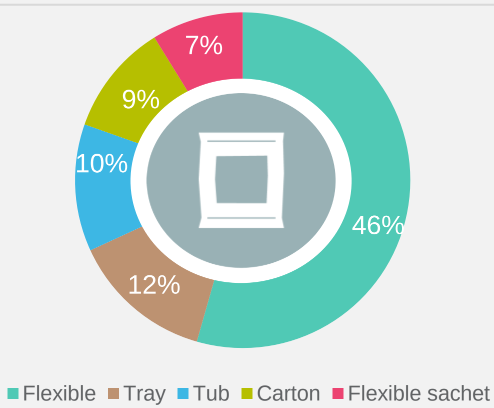


243 Global NPDs

Region



Top Pack Formats



Categories

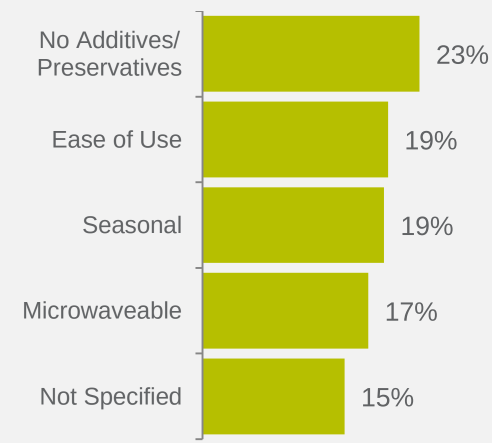
Bakery 26%

Meals 20%

Snacks 17%

Sauces & Seasonings 5%

Top Claims



Bean Product Launches:
Last 3 Months (December 2015 – February 2016)
Summary

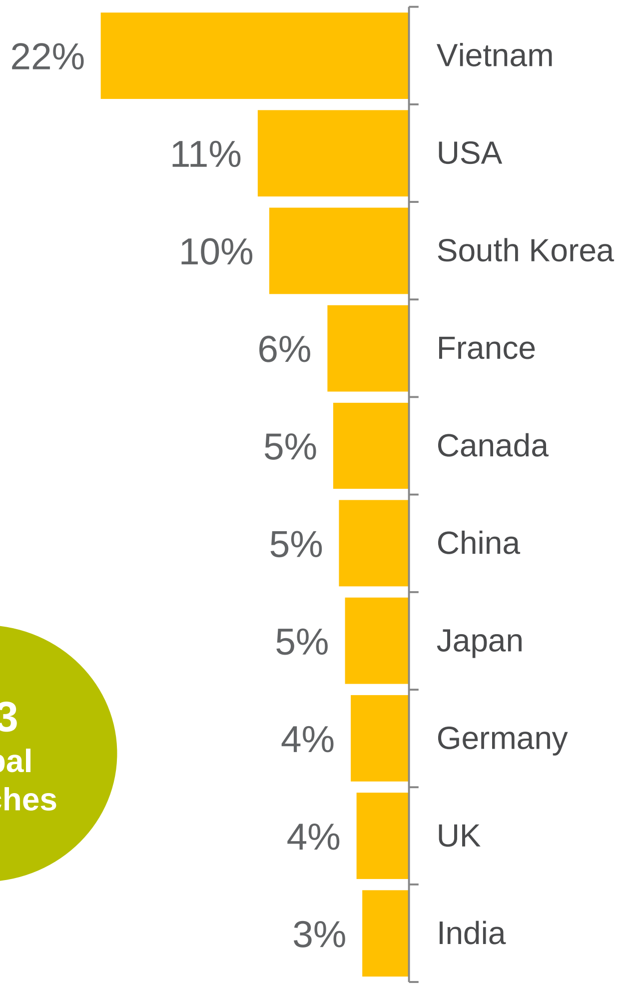
- A total of 243 products containing French and Runner beans as an ingredient were launched globally in the last 3 months, which is higher than previous trends.
- There was one product launched in Australia in the past three months.
- Asia Pacific (57%) continued to be the top region for product launches.
- Flexible (46%), tray (12%) and tub (10%) packaging formats are consistently used for bean products launched.
- The top categories for product launches were baked goods (26%), meals (20%) and snacks (17%).
- The core claims used for these launches globally were no additives/preservatives (23%), ease of use (19%) and seasonal (19%).
- The most innovative launch was the green bean candy from Vietnam. Examples of innovative green bean products can be found on the following slides.

Source: Mintel (2016)

Bean Launches
Country & Categories

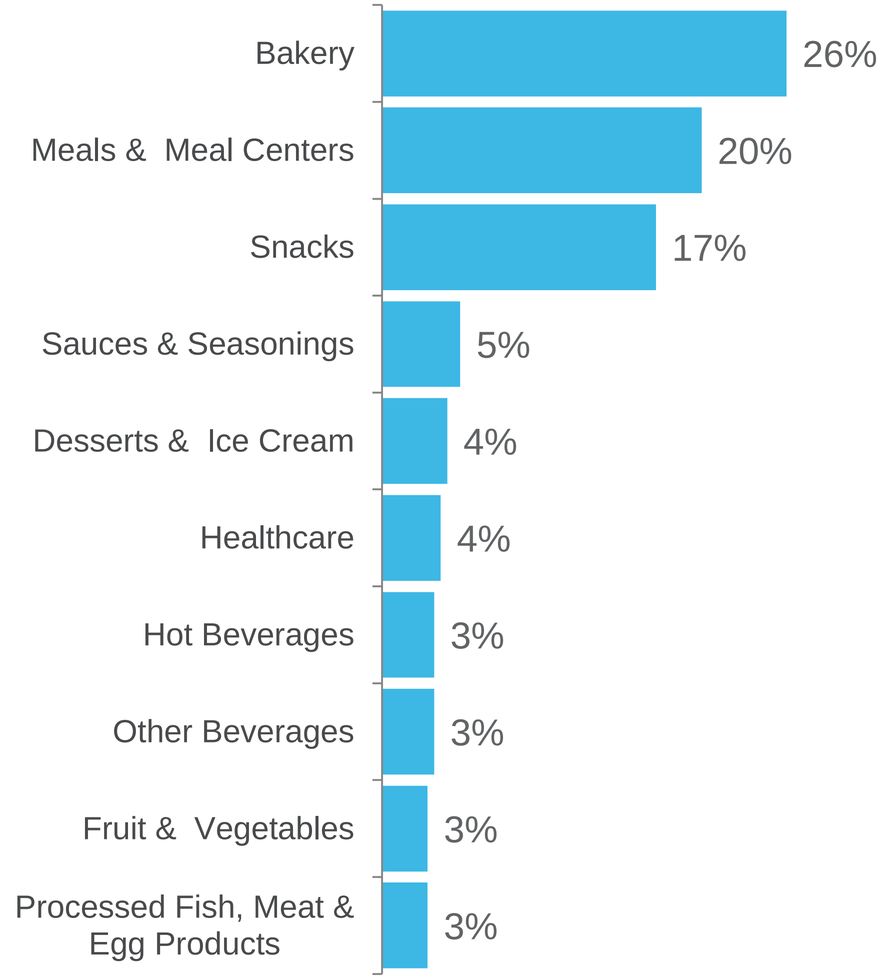
- Vietnam was the key country for green bean product launches, followed by USA and South Korea.
- Bakery, meals and snack products were the top categories for launches, relatively consistent with previous trends.

Top Launch Countries



243 Global Launches

Top Launch Categories



Bean Launches
Top Claims & Pack Formats Used

- No Additives/Preservatives was the most prominent claim in Wave 33. Ease of use and seasonal were also common claims used.
- Globally the top pack formats used for product launches were flexible packaging and trays.

Pack Formats Used

Global	Flexible	46%
	Tray	12%
	Tub	10%
Asia Pacific	Flexible	62%
	Flexible Sachet	11%
	Carton	8%
Europe	Flexible	24%
	Tray	19%
	Tub	16%

Top Claims Used

Global	No Additives/Preservatives	23%
	Ease of Use	19%
	Seasonal	19%
Asia Pacific	Seasonal	28%
	Ease of Use	23%
	No Additives/Preservatives	21%
Europe	Ethical – Environmentally Friendly Package	31%
	No Additives/Preservatives	24%
	Microwaveable	19%

Innovative Bean Launches:
L3M (December 2015 – February 2016)

JN Ny. Djuni Special Onde-Onde Banyumas Cake (Indonesia)

JN Ny. Djuni Onde-Onde Istimewa Banyumas (Special Onde-Onde Banyumas Cake) contains no preservatives and is described as a best quality cake. This product retails in a pack containing five units.

Claims:
No Additives/Preservatives

Fivimart Dragon Ky Anh Original Flavoured Green Bean Cake (Vietnam)

Fivimart Dragon Ky Anh Banh Dau Xanh (Original Flavoured Green Bean Cake) is now available. The soft 100% natural product is free from preservatives, and retails in a 150g pack featuring a Facebook link.

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

Badaone Vegetable & Cheese Flakes (South Korea)

Badaone Vegetable & Cheese Flakes contain 5.08% cheese flakes and 25.19% vegetables including cabbage, spinach, onion, radish leaves, leek, carrot, pumpkin, broccoli, green bean sprout and garlic. The flakes are free from additives and preservatives. The product can be topped or mixed with rice and retails in a 27g pack with three 9g sachets.

Claims:
No Additives/Preservatives

TT Green Bean Candy (Vietnam)

TT Keo Dau Xanh (Green Bean Candy) is now available. This product comes in a 400g pack.

Claims:
N/A

Source: Mintel (2016)

Innovative Bean Launches:
L3M (December 2015 – February 2016)

Dr. Morita Hyaluronic Acid Special Limited Set (Hong Kong)

Dr. Morita Hyaluronic Acid Special Limited Set has been repackaged in a newly designed pack containing: 2 x Arbutin Essence Facial Mask; 7 x Hyaluronic Acid Facial Mask; 3 x Aloe Vera Essence Facial Mask; and 1 x 150ml Hyaluronic Acid Extraordinary Emulsion.

Claims:
Organic, Botanical/Herbal, Whitening, Anti-Ageing, Exfoliating, Firming*, Mattifying*, Moisturising / Hydrating, Cleansing*, Time/Speed, Limited Edition

Nature's Way Alive! Immune Support Soft Jelly Multi-Vitamin (UK)

Nature's Way Alive! Immune Support Soft Jell Multi-Vitamin contains vitamins C, D and zinc which contribute to the normal function of the immune system plus black elderberry. This vegetarian food supplement is available in berry flavour, and contains 100mg dried fruit and vegetable powder, extract and juice per serving. It is free from gluten, soya, dairy, yeast, artificial flavours, colours, and preservatives. It is made with natural fruit flavour, and retails in a 60-ct. pack.

Claims:
No Additives/Preservatives, Vegetarian, Botanical/Herbal, Gluten-Free, Immune System (Functional), Low/No/Reduced Allergen

Fujiya Country Ma'am Chocochip Cookies Cocoa Ice Cream Cone (Japan)

Fujiya Country Ma'am Chocochip Cookies Cocoa Ice Cream Cone is a new cobranded variety with moist flavour. It retails in a 120ml pack. Launched on December 22, 2015 with an RRP of 189 yen.

Claims:
Cobranded

Cau Tre Green Bean Tapioca Dumpling (Vietnam)

Cau Tre Banh Bot Loc Nhan Dau Xanh (Green Bean Tapioca Dumpling) is now available. This high quality product comes in a 190g pack featuring cooking instructions and a Facebook link.

Claims:
Social Media

Source: Mintel (2016)

Innovative Bean Launches:
L3M (December 2015 – February 2016)

D'Aucy Mexican Salsa Vegetable Mix with Rice for Pan Frying (Poland)

D'Aucy Salsa Mieszanka Warzywna na Patelnie z Ryzem i Przyprawa Meksykanska (Mexican Salsa Vegetable Mix with Rice for Pan Frying) comprises of a mix of vegetables, rice and a Mexican-style spice, and can be prepared in six minutes in a pan. This product retails in a 400g convenient pack including a spice sachet and bearing a recipe idea and a Facebook logo.

Claims:
Convenient Packaging, Social Media

GutBio Organic Vegetable Cream Soup (Spain)

GutBio Crema Ecológica de Verduras (Organic Vegetable Cream Soup) is now available. This product is made with quinoa and algae wakame, and retails in a 470ml pack.

Claims:
Organic

Tong Garden NutriOne Cereal Drink with 25 Grains (Malaysia)

Tong Garden NutriOne Cereal Drink with 25 Grains is now available. This cholesterol and lactose free product contains flaxseed and no added preservatives or colouring. It is suitable for vegetarians and retails in a 360g pack containing 10 x 36g sachets and directions for use.

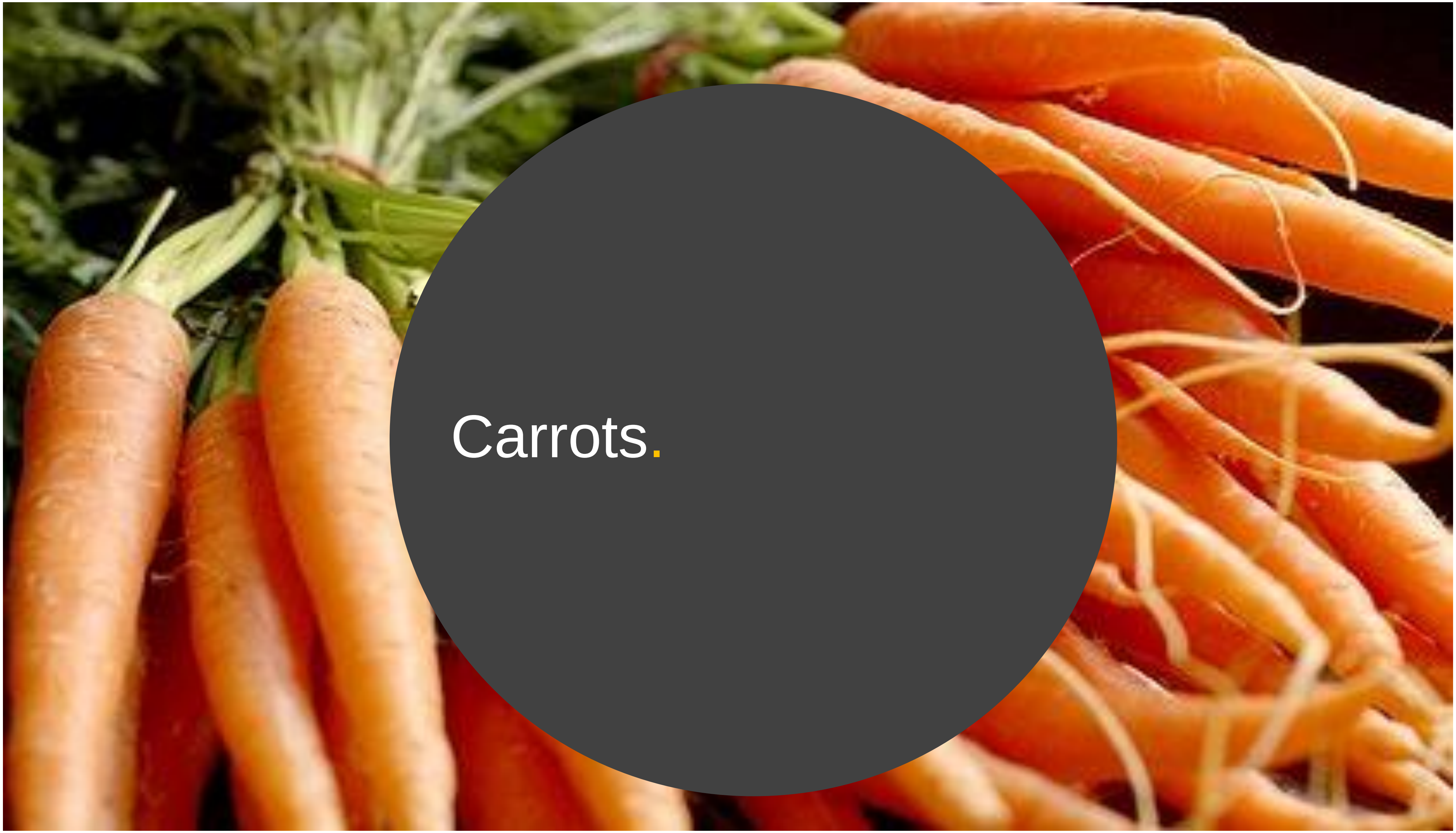
Claims:
No Additives/Preservatives, Low/No/Reduced Cholesterol, Vegetarian, Low/No/Reduced Allergen, Low/No/Reduced Lactose

Le Prix Gagnant! Vegetable Salad with Tuna & Pasta (Egypt)

Le Prix Gagnant! Vegetable Salad with Tuna & Pasta is made to an Italian recipe. Rich in vitamins, this product retails in a 260g recyclable pack.

Claims:
Economy, Ethical - Environmentally Friendly Package

Source: Mintel (2016)



Carrots.

Carrots are consumed on average once every two days, and are purchased once a week.

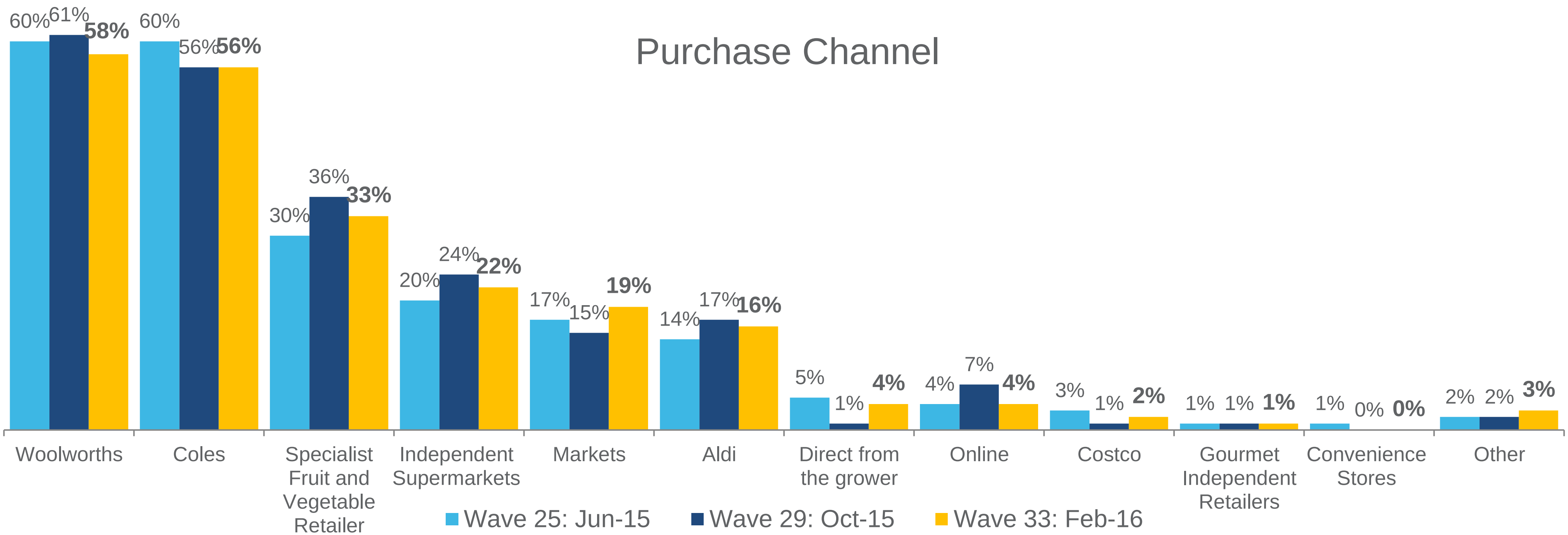
Mainstream retailers remain the key purchase channel, with specialist vegetable retailers and independent supermarkets also popular channels.

Average Purchase **4.0** times per month

▼ 3.9 times, Wave 25
▼ 3.9 times, Wave 29

Average Consumption **14.7** times per month

▼ 14.0 times, Wave 25
▲ 15.2 times, Wave 29



Q1. On average, how often do you purchase carrot?
Q2. On average, how often do you consume carrot?
Q5. From which of the following channels do you typically purchase carrot?
Sample Wave 25 N=305, Wave 29 N=302, Wave 33 N=302

Horticulture Innovation Australia

colmar brunton.

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

Average Spend and Price Sensitivity

Average weight of purchase

The typical consumer purchases **1.1kg** of carrots, which is slightly below the previous waves.

▲ 1.2kg, Wave 25
▲ 1.2kg, Wave 29

Recalled last spend

Recalled last spend on carrots was **$2.30**, remaining consistent across past waves.

– $2.30, Wave 25
– $2.30, Wave 29

Value for money

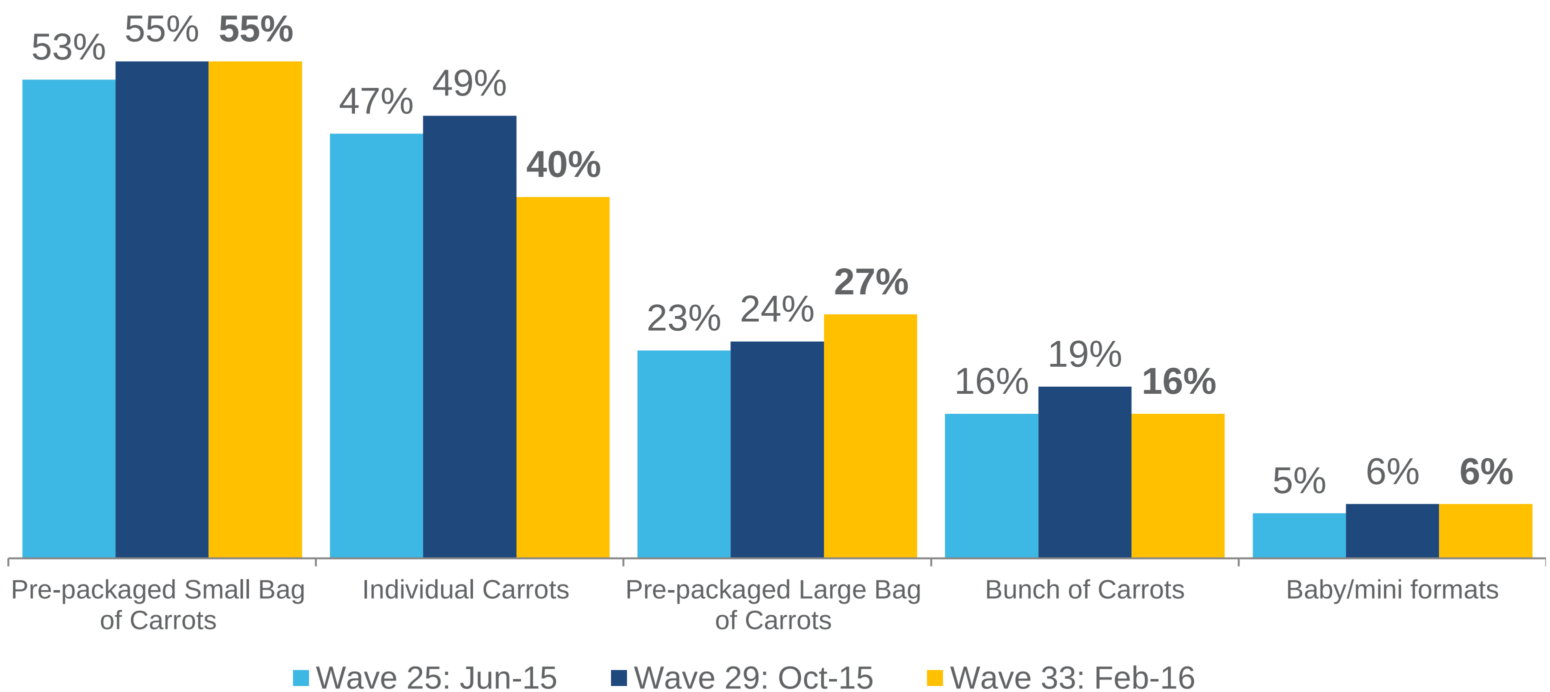
Consumers' perceived value for money is very good **(7.5/10),** relatively consistent with previous waves.

▼ 7.4/10, Wave 25
▲ 7.6/10, Wave 29

Q3. How much carrot 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 25 N=305, Wave 29 N=302, Wave 33 N=302

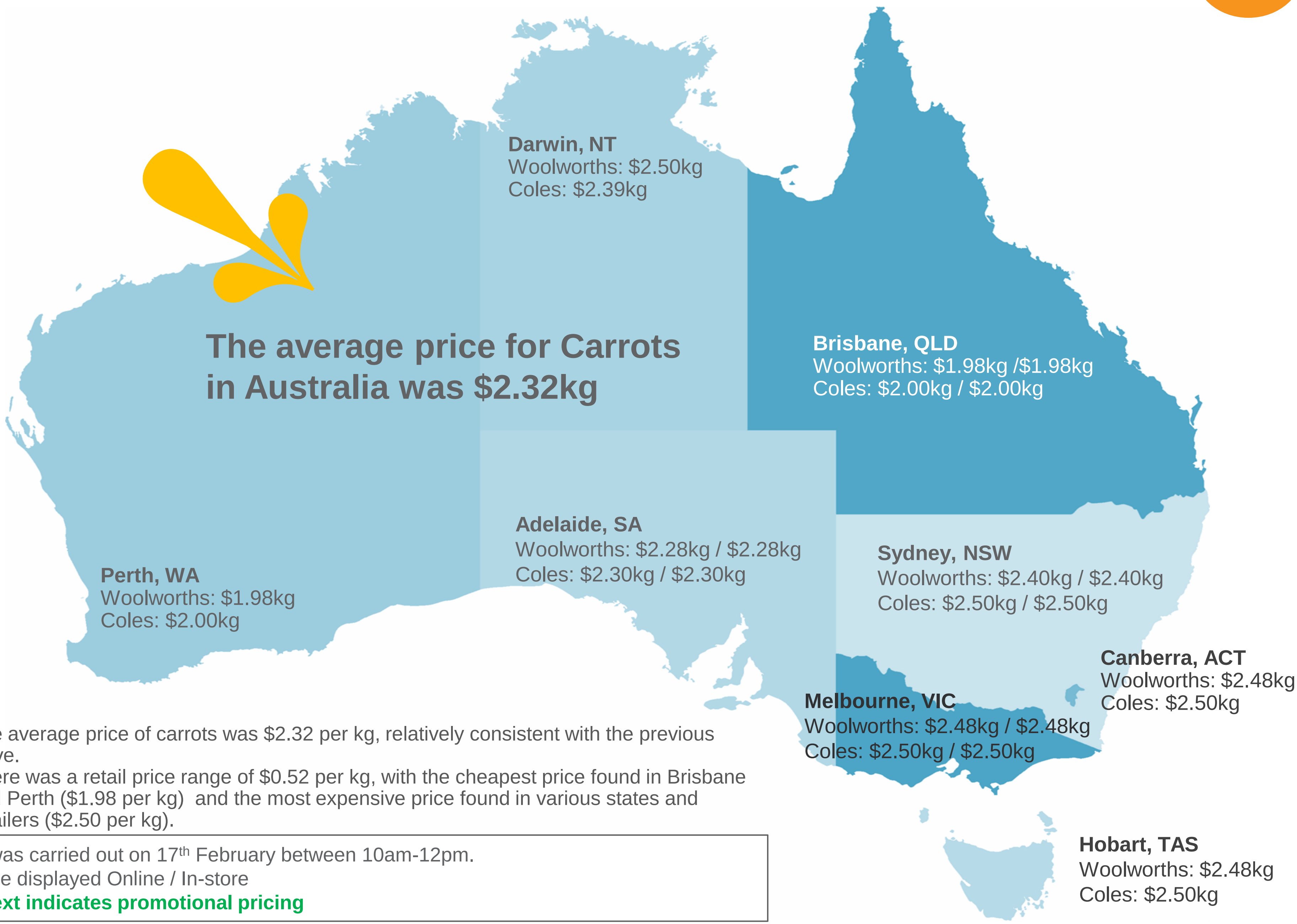
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Small bags of carrots remain the primary format purchased. There has been a noticeable decrease in purchase of individual carrots, whilst pre-packaged large bags have trended upwards over the last three waves.



Q4b. In what fresh formats do you typically purchase Carrots?
Sample Wave 25 N=305, Wave 29 N=302, Wave 33 N=302

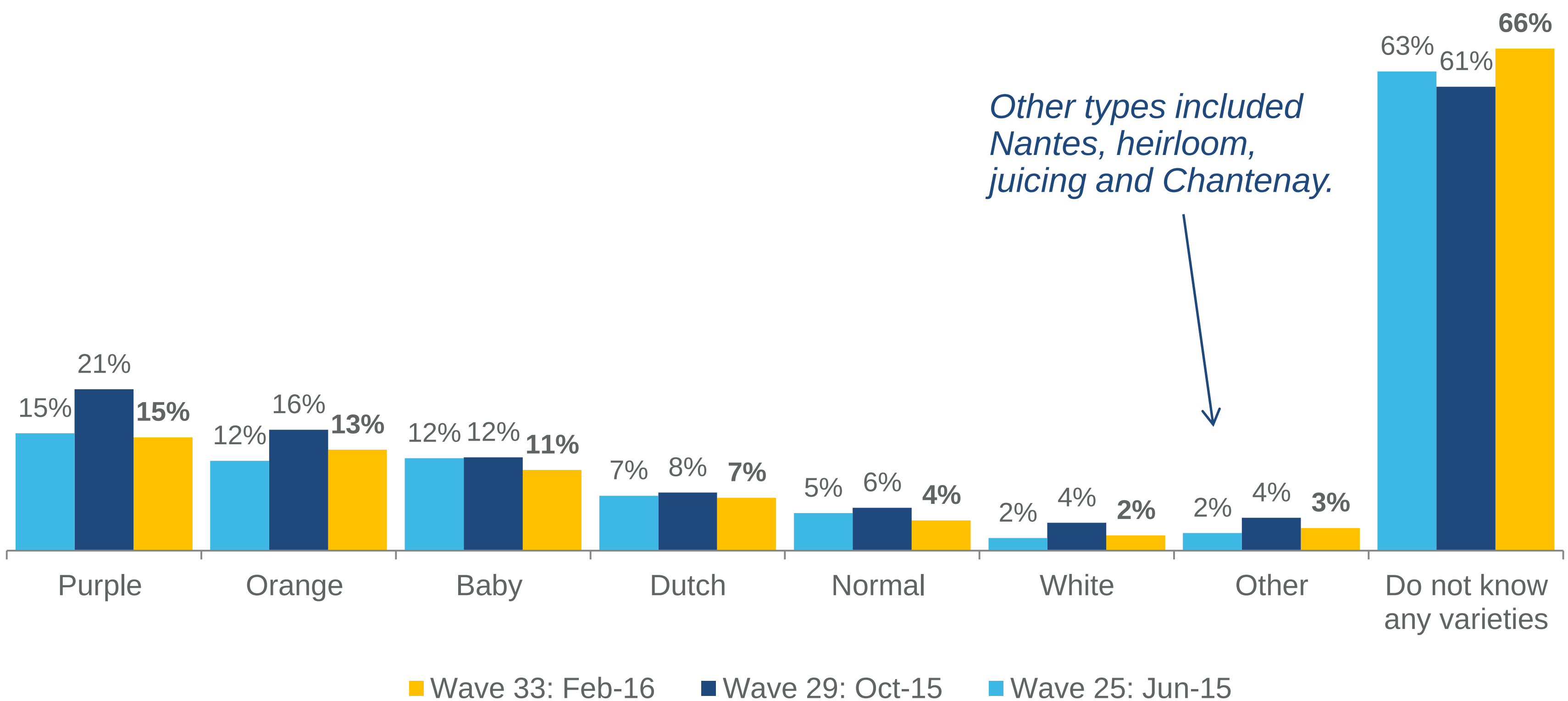
Online and In-store Commodity Prices



- The average price of carrots was $2.32 per kg, relatively consistent with the previous wave.
- There was a retail price range of $0.52 per kg, with the cheapest price found in Brisbane and Perth ($1.98 per kg) and the most expensive price found in various states and retailers ($2.50 per kg).

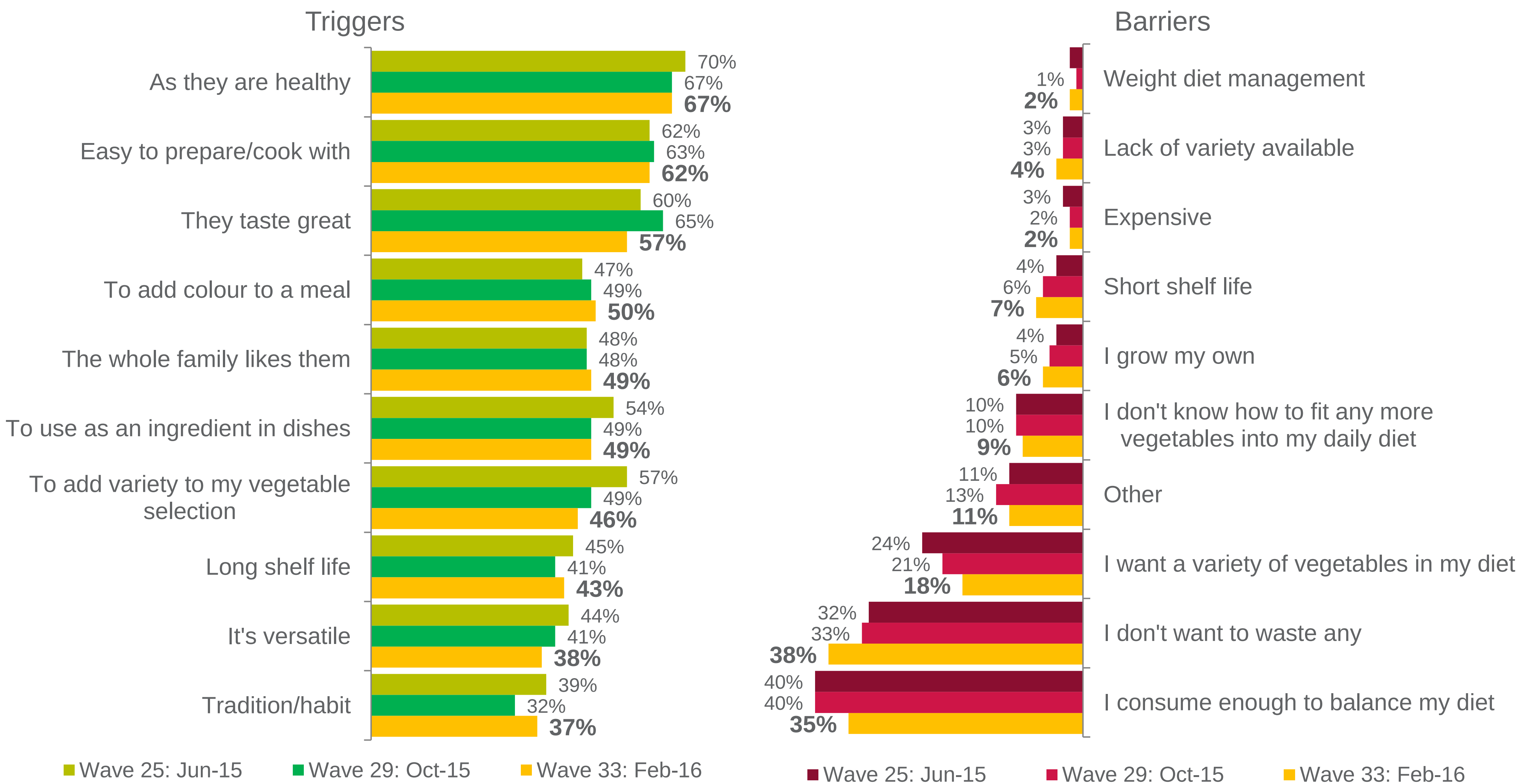
Pricing was carried out on 17th February between 10am-12pm.
Prices are displayed Online / In-store
Green text indicates promotional pricing

Two thirds of consumers are unable to recall a type of carrot. Colour is the main trigger for unprompted carrot variety awareness with purple and orange having the highest recall.



Q6a. What varieties/types of carrot are you aware of? (unprompted)
Sample Wave 25 N=305, Wave 29 N=302, Wave 33 N=302

Health, ease of preparation and taste are the main drivers of carrot purchase. Already consuming enough and not wanting to waste any remain the main barriers for future purchase.



Q7. Which of the following reasons best describes why you purchase carrot?
Q8. Which reason best describes why you don't buy carrot more often?
Sample Wave 25 N=305, Wave 29 N=302, Wave 33 N=302

There has been no significant movement in cuisines over the previous three waves, indicating consumers may lack interest and inspiration for alternative cuisines.

Dinner remains the dominant meal occasion.

Top 5 Consumption Occasions

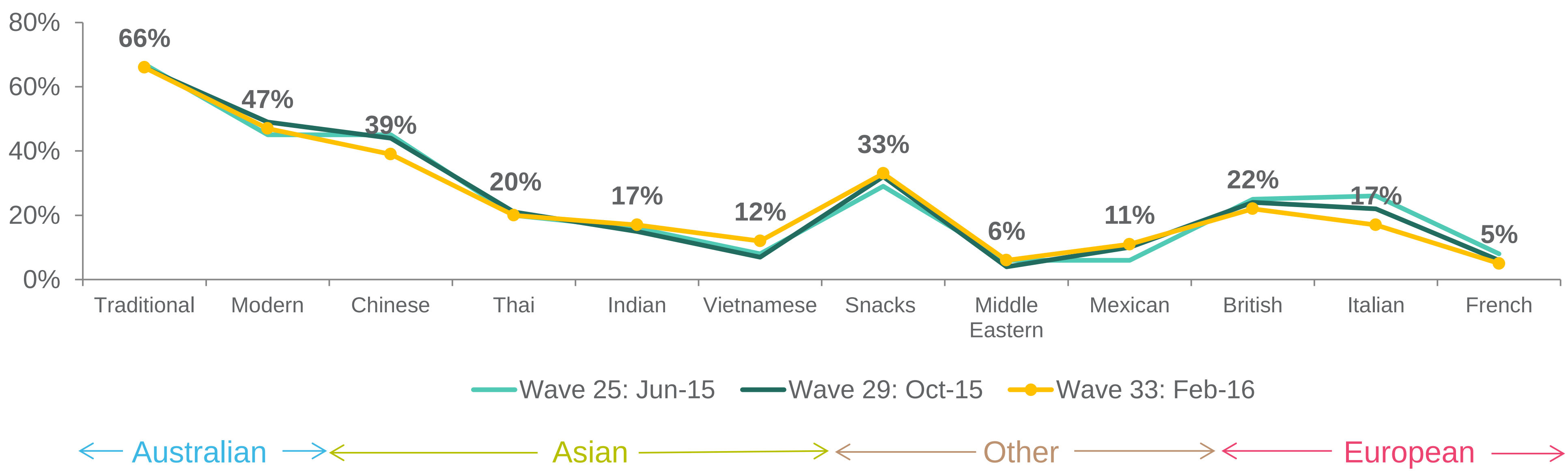
	Wave 29	Wave 33
Dinner	78%	**80%**
Family Meals	70%	**66%**
Weekday Meals	63%	**60%**
Quick Meals	50%	**49%**
Weekend Meals	53%	**47%**

23% used carrot when cooking a new recipe

▼ 20%, Wave 25

23%, Wave 29

Typical Cuisine Cooked



Q10. What cuisines do you cook/consume that use carrot?
Q11. Which of the following occasions do you typically consume/use carrot?
Sample Wave 25 N=305, Wave 29 N=302, Wave 33 N=302

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

Carrots are typically served with potatoes, broccoli and onion.

Consumers cook carrots in a variety of ways. Over half of consumers eat carrots raw, whilst stir frying and roasting are other popular cooking styles.

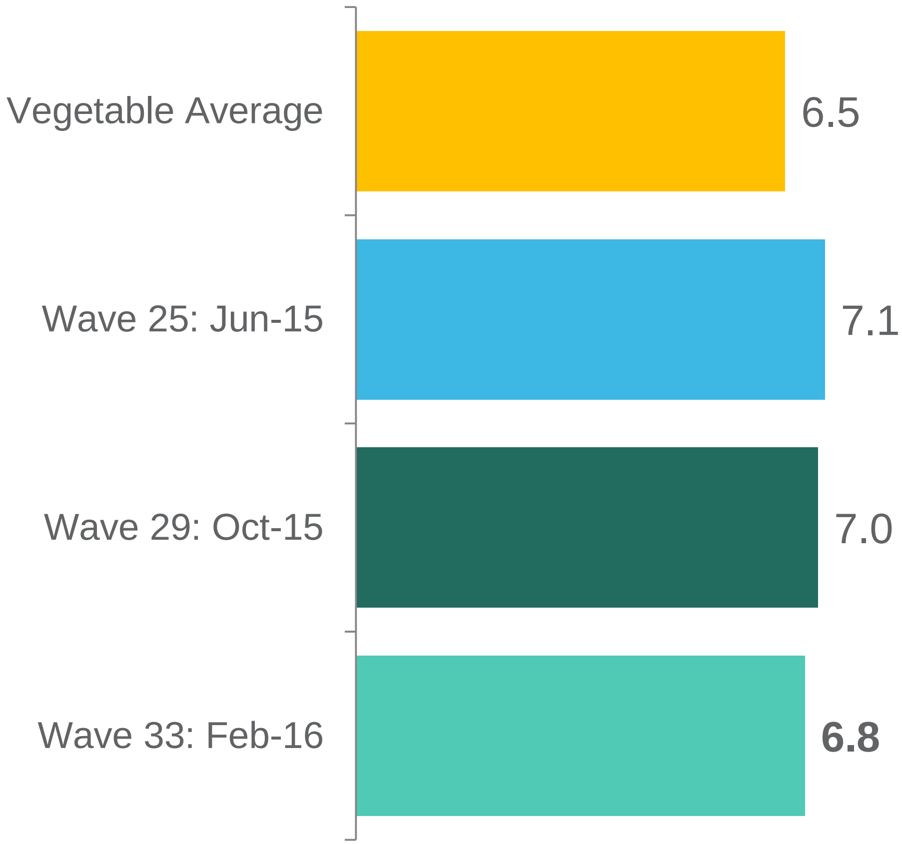
Accompanying Vegetables

Potato	66% ▼
Broccoli	47% ▼
Onion	44% ▲
Pumpkin	37% ▲
Tomato	37% ▲

Top 10 Cooking Styles			
	Wave 25	Wave 29	Wave 33
Raw	47%	57%	**58%**
Stir frying	50%	55%	**52%**
Roasting	53%	52%	**50%**
Steaming	47%	53%	**50%**
Boiling	49%	43%	**42%**
Soup	41%	36%	**33%**
Slow Cooking	29%	24%	**28%**
Microwave	25%	21%	**26%**
Baking	28%	21%	**26%**
Sautéing	12%	16%	**13%**

Q9. How do you typically cook carrot?
Q10a. And when are you serving carrot which of the following do you also serve together with this?
Sample Wave 25 N=305, Wave 29 N=302, Wave 33 N=302

Carrot provenance has slightly declined this wave, but is still important to consumers. Knowing their carrots are Australian grown remains the most important provenance information.



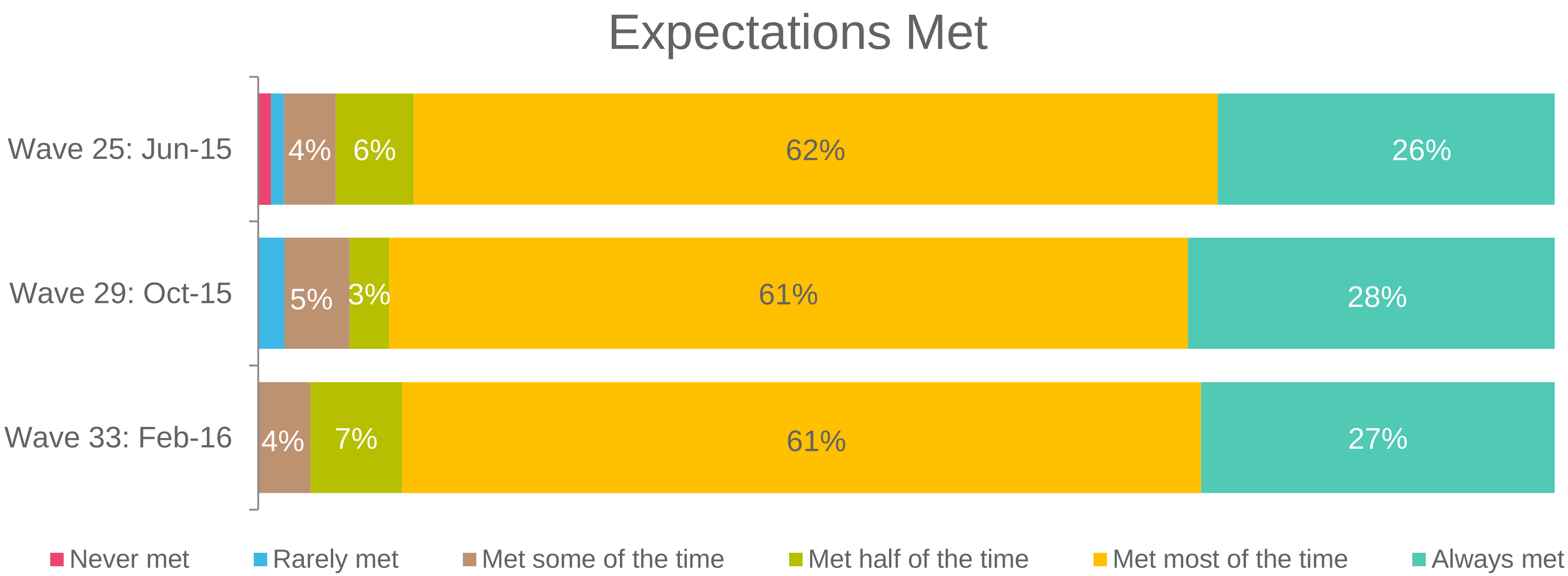
8.1

Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 25 N=305, Wave 29 N=302, Wave 33 N=302

Carrots are expected to stay fresh for just under two weeks, with satisfaction of freshness consistent with previous waves.

Expected to stay fresh for **12.7** days

▼ 12.6 days, Wave 25
▼ 12.3 days, Wave 29



Q12. How long do you expect carrots to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy carrots?
Sample Wave 25 N=305, Wave 29 N=302, Wave 33 N=302

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

Carrot Product Launch Trends.

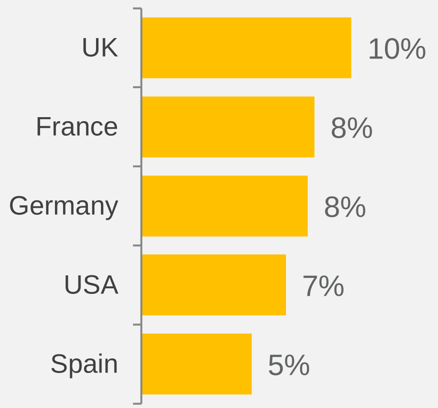
Carrot Global NPDs

December 2015 – February 2016

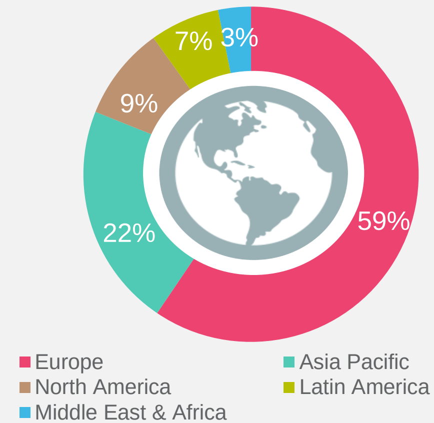
There were 2499 global new products launched over the last 3 months that contained carrot as an ingredient, a significant increase from the previous wave (1833). The majority of these launches occurred in Europe. Flexible packaging was most common and the key launch category was meals.

2499 Global NPDs

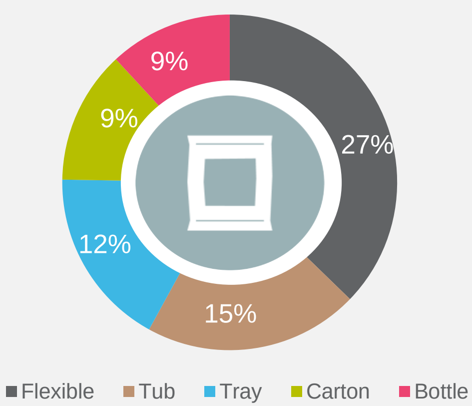
Country



Region



Top Pack Formats



Categories

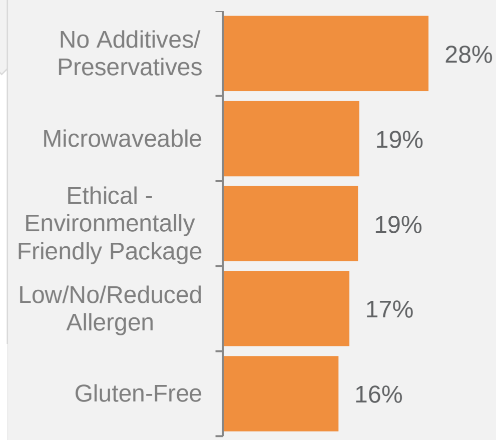
Meals 19%

Sauces & Seasonings 10%

Sugar & Gum 7%

Dairy 7%

Top Claims



Carrot Product Launches:
Last 3 Months (December 2015 – February 2016)
Summary

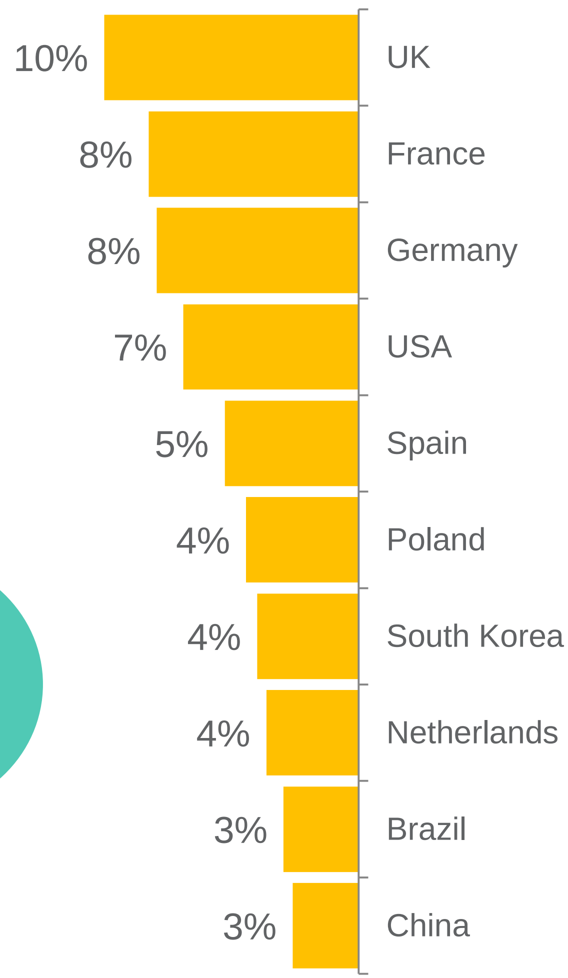
- A total of 2499 products were launched globally in the last 3 months containing carrot as an ingredient, which has increased since the previous wave (1833 launches).
- There were 44 carrot-containing products launched in Australia in the last quarter. See upcoming pages for examples of Australian launches.
- Europe and the Asia Pacific were the 2 top regions for these product launches (59% and 22% respectively).
- The top pack formats used were flexible formats (27%) and tubs (15%).
- The top categories for product launches were meals (19%), sauces & seasonings (10%) and sugar & gum confectionary (7%).
- The top claims used for launches globally were no additives/preservatives (28%), microwaveable (19%), and ethical - environmentally friendly (19%).
- The most innovative launch found was vegetarian sweet and sour porkless bites from the USA. Examples of these products can be found at the end of the carrot trend report.

Source: Mintel (2016)

Carrot Launches
Country & Categories

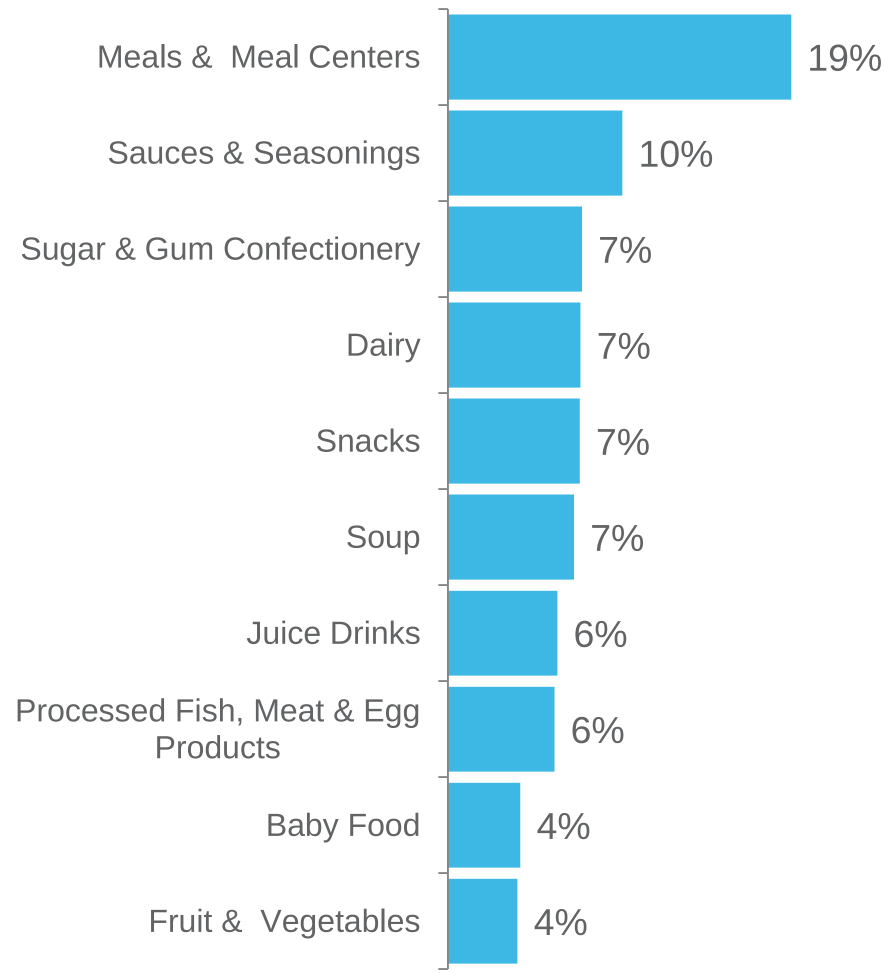
- The most active countries for launches in the last three months were UK, France and Germany.
- Meals remained the most common category for launches, followed by sauces & seasonings.

Top Launch Countries



2499 Global Launches

Top Launch Categories



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Carrot Launches

Top Claims & Pack Formats Used

- Flexible packaging, tubs and trays were the most common pack formats globally, consistent with formats in Europe.
- The key claim was centred around health, including no additive/ preservatives, while microwavable and ethical – environmentally friendly were also commonly used claims.

Pack Formats Used

Global	Flexible	27%
	Tub	15%
	Tray	12%
Europe	Flexible	24%
	Tub	20%
	Tray	16%
Asia Pacific	Flexible	38%
	Flexible Stand-Up Pouch	10%
	Flexible Sachet	9%

Top Claims Used

Global	No Additives/Preservatives	28%
	Microwaveable	19%
	Ethical - Environmentally Friendly Package	19%
Europe	No Additives/Preservatives	24%
	Microwaveable	20%
	Ethical - Environmentally Friendly Package	19%
Asia Pacific	No Additives/Preservatives	33%
	Ease of Use	19%
	Microwaveable	17%

Innovative Carrot Launches:
L3M (December 2015 – February 2016)

Dr. C. Soldan Em-Eukal Pomegranate & Honey Sweets (Germany)

Dr. C. Soldan Em-Eukal Granatapfel-Honig (Pomegranate & Honey Sweets) are now available. The product contains vitamin C, is free from gluten and lactose and said to be naturally refreshing and soothing. This product retails in a 75g pack.

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

Gardein Sweet and Sour Porkless Bites (USA)

Gardein Sweet and Sour Porkless Bites are meat-free. The kosher certified product is prepared with a savory blend of non-GMO soy, wheat and vegetables, can be prepared in two minutes and is ideal with added vegetables and pineapple. It comes with a microwaveable sauce, is suitable for vegans and retails in a 10.5-oz. pack, featuring the Facebook and Twitter logos. The manufacturer gives to organizations that make the world a better place.

Claims:
Kosher, Microwaveable, Ethical - Charity, Vegan, Time/Speed, No Animal Ingredients, GMO-Free, Social Media

Madanifood Enjoy Seafood Fish Dumplings (Indonesia)

Mandanifood Enjoy Seafood Siomay Ekado (Fish Dumplings) have been repackaged in a newly designed 500g pack. The product is halal certified.

Claims:
Halal

Hella Strawberry Flavoured Lemonade (Germany)

Hella Erdbeer Limonade (Strawberry Flavoured Lemonade) is now available. The product has a 6% fruit content and is mixed with natural mineral water. It retails in a 0.75L bottle.

Claims:
NA

Source: Mintel (2016)

Innovative Carrot Launches:
L3M (December 2015 – February 2016)

Sweetie Pie Organics Carrot Tiny Wafers (USA)

Sweetie Pie Organics Carrot Tiny Wafers come with a full serving of vegetables for toddlers. The product is USDA organic certified and contains no GMO ingredients, preservatives or added sugars. It retails in a 1.06-oz. pack.

Claims:
No Additives/Preservatives, Low/No/Reduced Sugar, Organic, Babies & Toddlers (0-4), GMO-Free

Viena Chunky Sauce (Costa Rica)

Viena Salsa Chunky (Chunky Sauce) is now available. This hot-free product can be used with tacos, refried beans, meats and other foods or as a dipping sauce. It contains tomato pieces and vegetables, and retails in a 415g pack.

Claims:
N/A

Pastella Fresh Vegetable Pasta with Carrots (UK)

Pastella Fresh Vegetable Pasta with Carrots has been repackaged and retails in a newly designed 250g pack that serves two and features a QR code. The vegetarian pasteurized product contains 40% carrots in pasta dough, can be prepared in one minute, and is suitable for freezing.

Claims:
Vegetarian

Vitam Vegan Crude Liver Pâte Sandwich Spread (Germany)

Vitam wie wie Pfälzer Leberwurst Veganer Brotaufstrich (Vegan Crude Liver Pâte Sandwich Spread) is now available. This organic product is a vegan alternative to classic Palatine liver sausage. This product was on display at Biofach 2016 in Nuremberg, Germany.

Claims:
Organic, Vegan, No Animal Ingredients

Source: Mintel (2016)

Innovative Carrot Launches:
L3M (December 2015 – February 2016)

Ella's Kitchen Toddler Carrots + Lentils Multigrain Sticks (USA)

Ella's Kitchen Toddler Carrots + Lentils Multigrain Sticks are now available. The USDA organic and kosher certified product is described as an unsweetened and unsalted multigrain snack that is free from artificial colors, artificial flavors, concentrates, GMOs and salt. This snack is said to be great for picnics, shopping trips, car journeys, lunch boxes or even for munching at home, is suitable for toddlers from one year of age, and retails in a 2-oz. recyclable pack, containing six 0.34-oz. handy units. The pack is made from forests that are carefully looked after.

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

Kilikya Adana Hot Spicy Fermented Carrot Juice Drink (Turkey)

Kilikya Acili Adana Salgam Suyu (Adana Hot Spicy Fermented Carrot Juice Drink) has been repackaged. This product retails in a 330ml pack.

Claims:
N/A

Rowita Dried Vegetables (Poland)

Rowita Wloszczyzna Suszona (Dried Vegetables) are free from salt and artificial additives, and can be used for preparing soups and other dishes. This product retails in a 90g pack.

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

Carrefour Selection Vegetable Crisps (Spain)

Carrefour Selection Chips de Hortalizas (Vegetable Crisps) are now available. The product comprises carrots, parsnip, beetroot and sweet potato, and retails in a 100g pack.

Claims:
Premium

Source: Mintel (2016)

Top Australian Carrot Launches:
L3M (December 2015 – February 2016)

Nöm Cremix Chocolate & Raspberry Yogurt

Chiko Original Chiko Rolls

Mother Earth Apple & Raspberry Fruit Sticks

White Mill Carrot Cake Mix

Simply Special Mixed Vegetable Pakoras

Homestyle Clever Cooks Pasta Bake

Tuscan Fresh Roast Chicken & Garlic Tortellini

Edgell Red Kidney Bean Salad

Impressed Berry Beets Cold Pressed Juice

Hanabi Tasty Bites Korean Vegetable Gyoza

Coles Australian Superfood Leaf Blend

Clif Shot Bloks Mountain Berry Flavour Energy Chews

Source: Mintel (2016)


Cauliflower.

Purchase and consumption of cauliflower is relatively on trend with previous months.

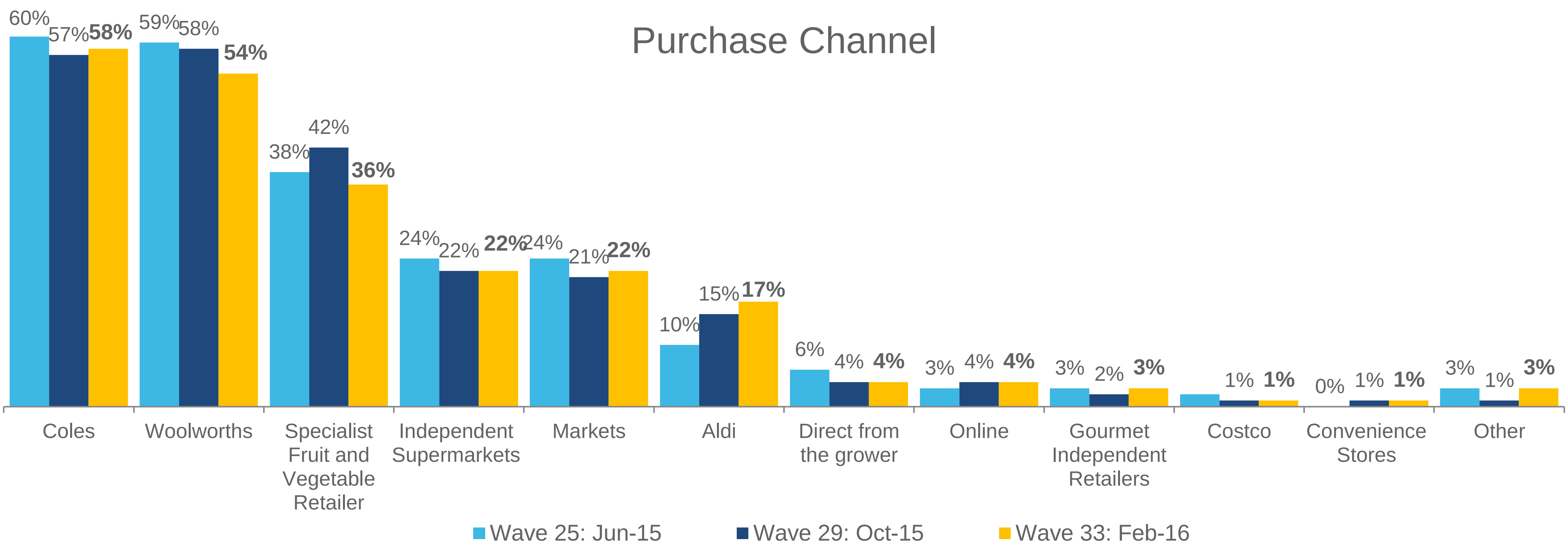
Cauliflower is typically purchased from mainstream retailers, Coles and Woolworths, whilst there has been a steady increase in purchase from Aldi.

Average Purchase 3.3 times per month

▼ 3.2 times, Wave 25
▲ 3.4 times, Wave 29

Average Consumption 8.2 times per month

▲ 8.6 times, Wave 25
▼ 8.1 times, Wave 29



Q1. On average, how often do you purchase cauliflower?
Q2. On average, how often do you consume cauliflower?
Q5. From which of the following channels do you typically purchase cauliflower?
Sample Wave 25 N=305, Wave 29 N=301, Wave 33 N=301

Horticulture Innovation Australia

colmar brunton.

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

Average Spend and Price Sensitivity

Average weight of purchase

The typical consumer purchases **1.0kg** of cauliflower, consistent with past months.

— 1.0kg, Wave 25
— 1.0kg, Wave 29

Recalled last spend

Recalled last spend on cauliflower is **$3.40,** relatively consistent with the previous wave.

▲ $3.50, Wave 25
▼ $3.30, Wave 29

Value for money

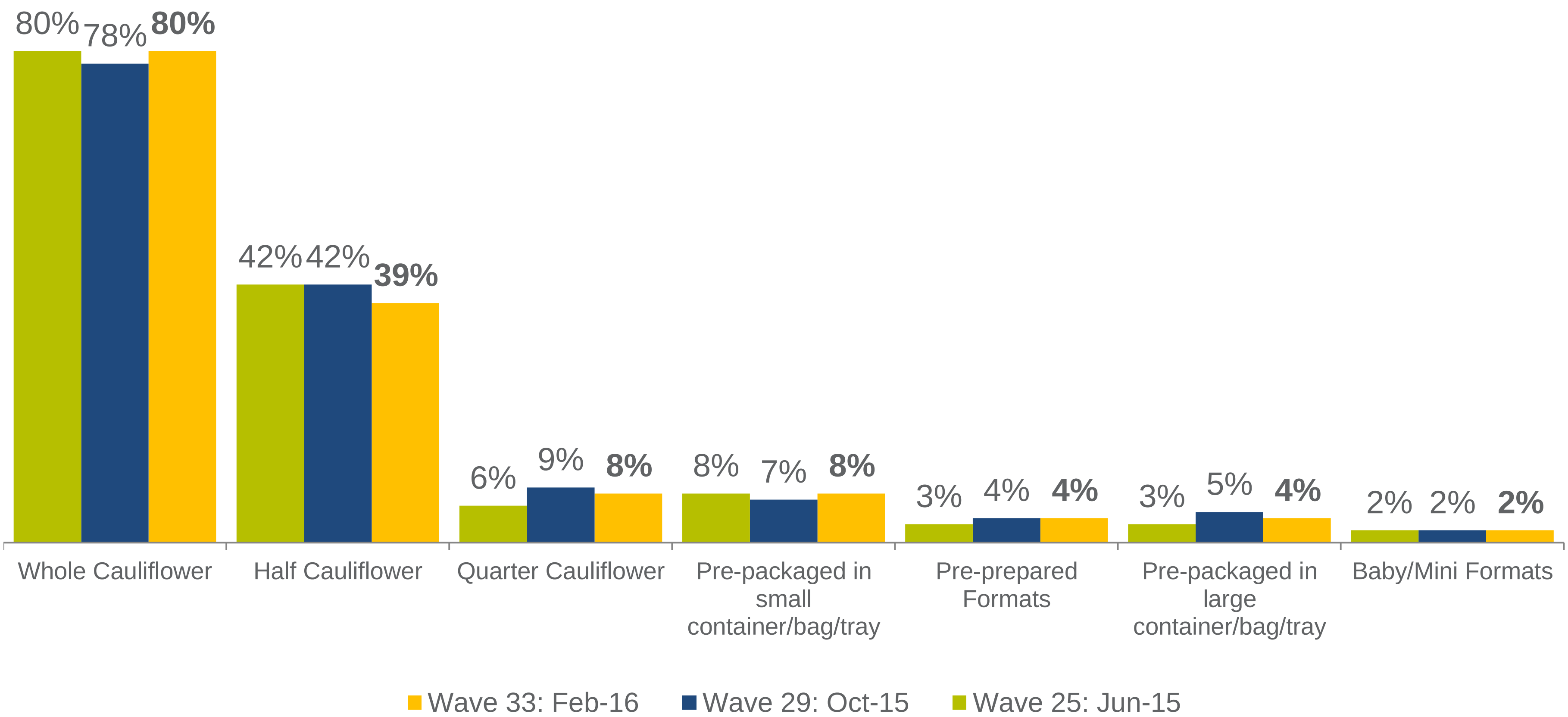
Consumers perceive cauliflower to be fair value for money **(5.9/10)**, noticeably decreasing this wave.

▲ 6.0/10, Wave 25
▲ 6.6/10, Wave 29

Q3. How much cauliflower 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 25 N=305, Wave 29 N=301, Wave 33 N=301

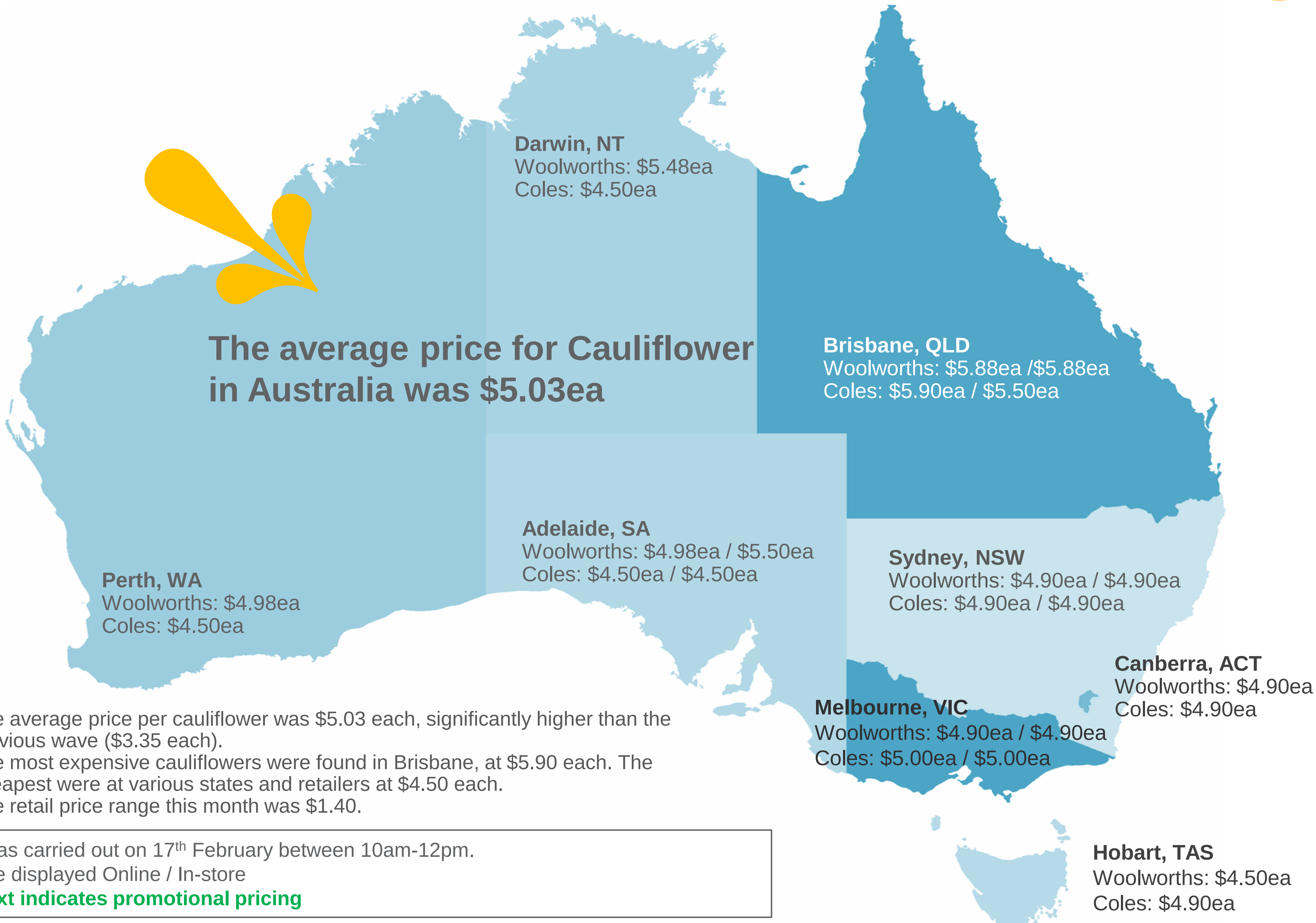
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Whole heads of cauliflower continue to be the main format purchased, with half cauliflowers also a popular format option. Pre-packaged products only make up a small portion of the formats purchased.



Q4b. In what fresh formats do you typically purchase cauliflower?
Sample Wave 25 N=305, Wave 29 N=301, Wave 33 N=301

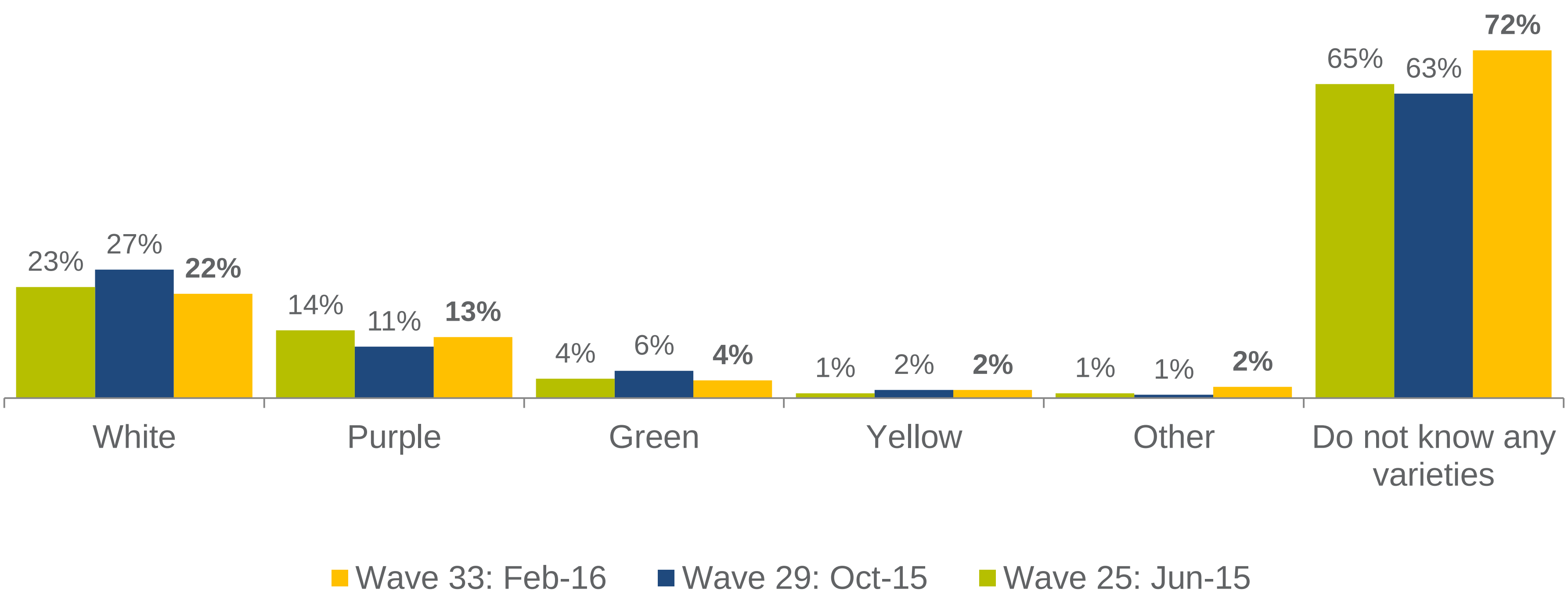
Online and In-store Commodity Prices



- The average price per cauliflower was $5.03 each, significantly higher than the previous wave ($3.35 each).
- The most expensive cauliflowers were found in Brisbane, at $5.90 each. The cheapest were at various states and retailers at $4.50 each.
- The retail price range this month was $1.40.

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

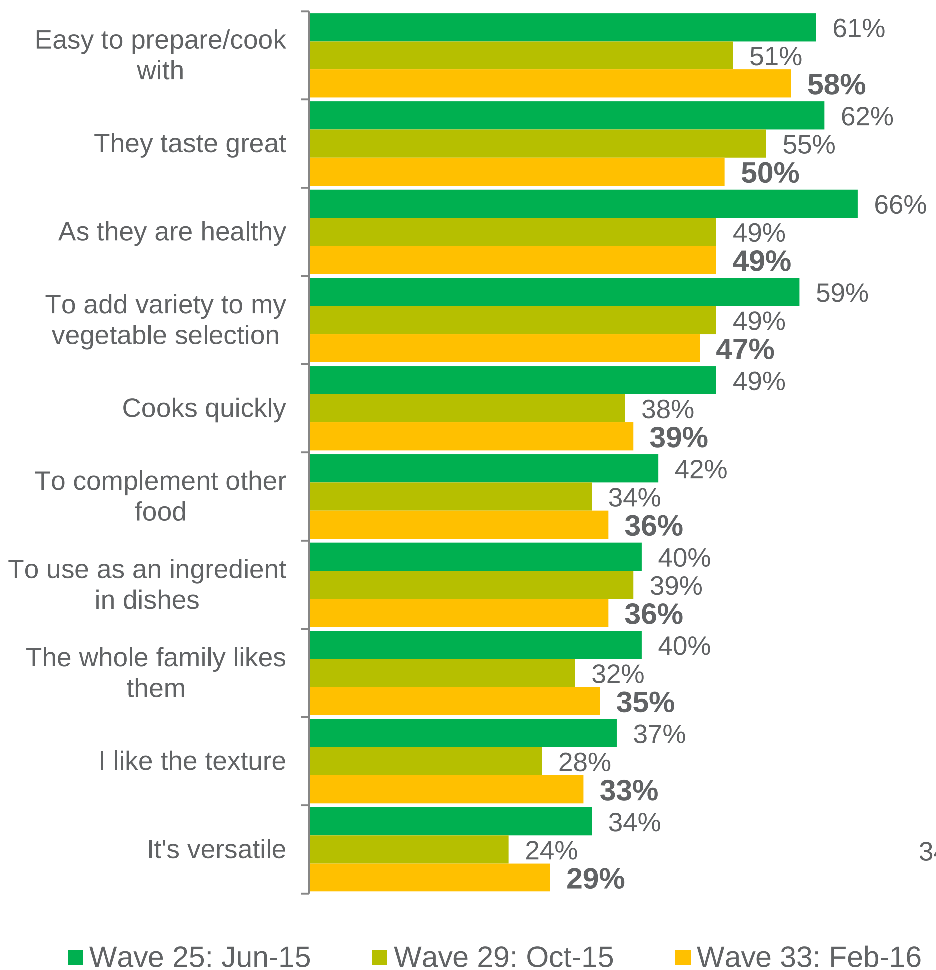
Spontaneous awareness remains very low. Consumers are most likely to recall white and purple as the main varieties of cauliflower.



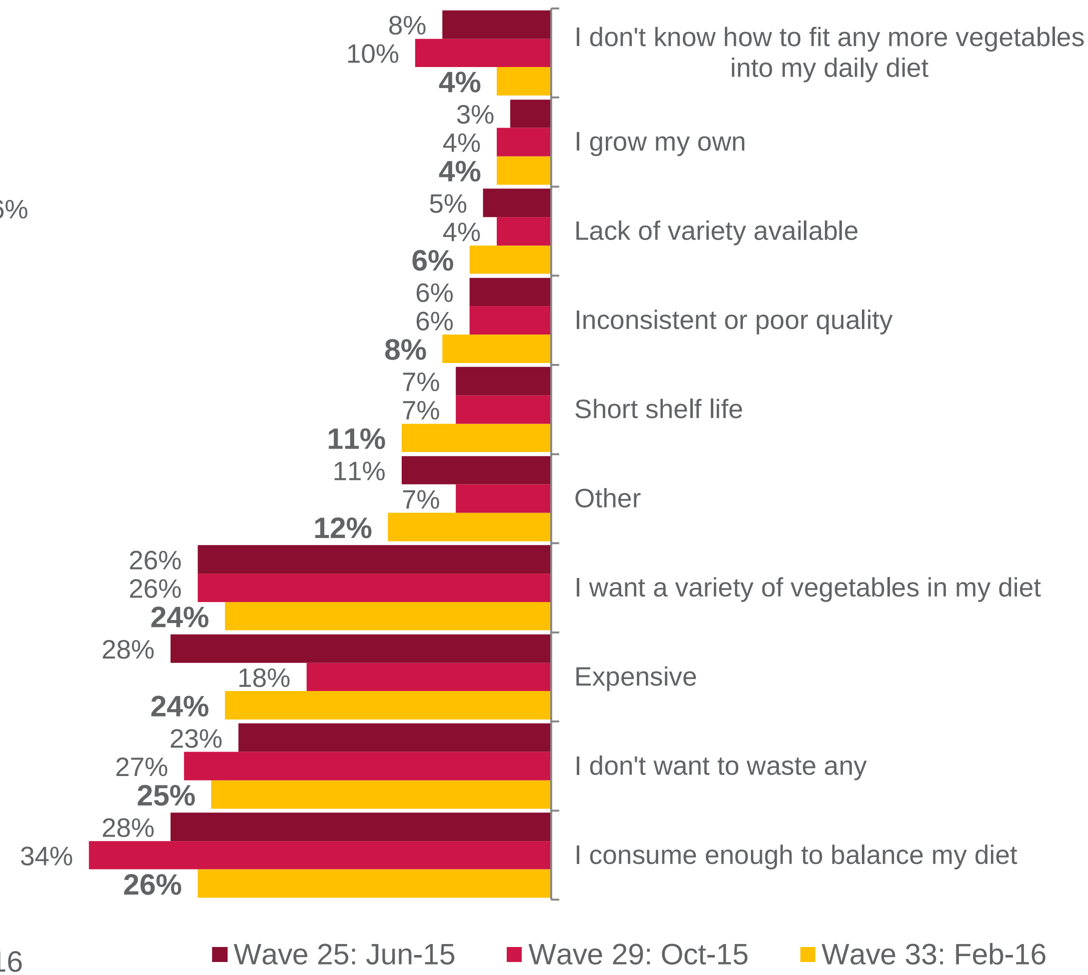
Q6a. What varieties of cauliflower are you aware of? (unprompted)
Sample Wave 25 N=305, Wave 29 N=301, Wave 33 N=301

Ease of preparation, taste and health are the primary influences on purchase. Already consuming enough and not wanting to waste any are the key barriers inhibiting purchase.

Triggers



Barriers



Q7. Which of the following reasons best describes why you purchase cauliflower?
Q8. Which reason best describes why you don't buy cauliflower more often?
Sample Wave 25 N=305, Wave 29 N=301, Wave 33 N=301

Consumers prefer to use cauliflower in Australian and Asian cuisine.

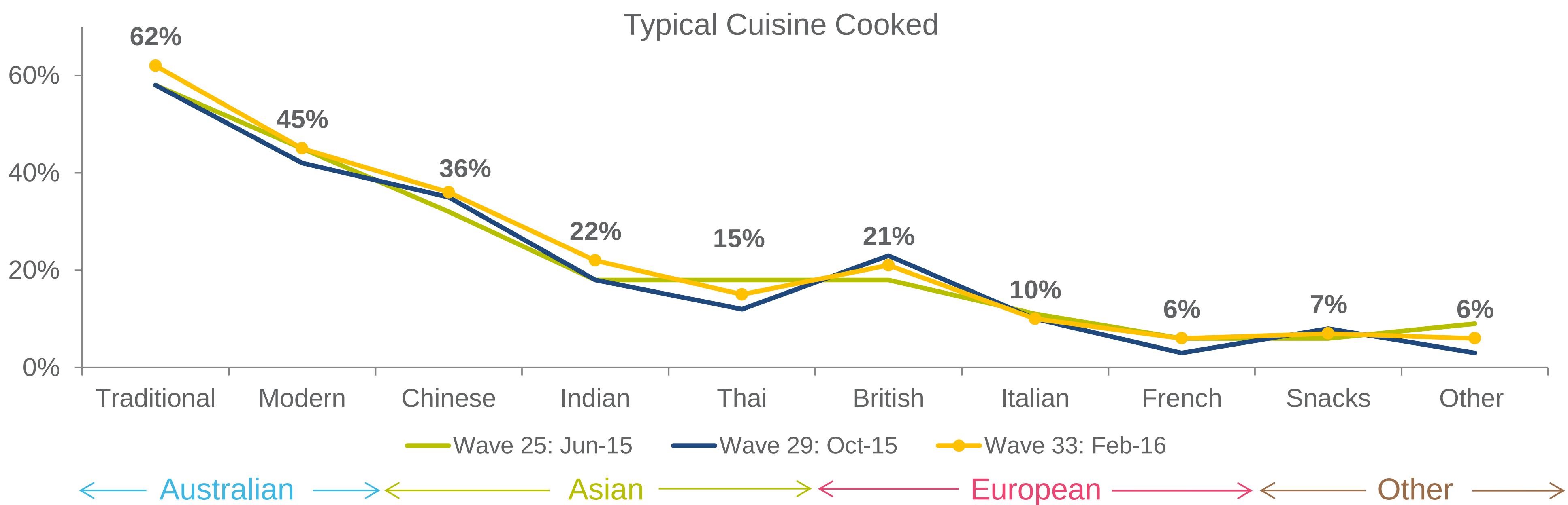
Dinners and family meals are the key meal occasions. There has been an upwards trend in cauliflower being used when cooking a new recipe.

Top 5 Consumption Occasions

	Wave 29	Wave 33
Dinner	75%	**72%**
Family Meals	59%	**69%**
Weekday Meals	47%	**51%**
Weekend Meals	41%	**40%**
Quick Meals	32%	**37%**

20% used cauliflower when cooking a new recipe

▼ 17%, Wave 25
▼ 13%, Wave 29



Q10. What cuisines do you cook/consume that use cauliflower?
Q11. Which of the following occasions do you typically consume/use cauliflower?
Sample Wave 25 N=305, Wave 29 N=301, Wave 33 N=301

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

Cauliflower is generally steamed, cooked in stir fries and boiled. The last three waves have seen a steady increase in microwaving and roasting.

Carrots and potatoes are consistently served with cauliflower.

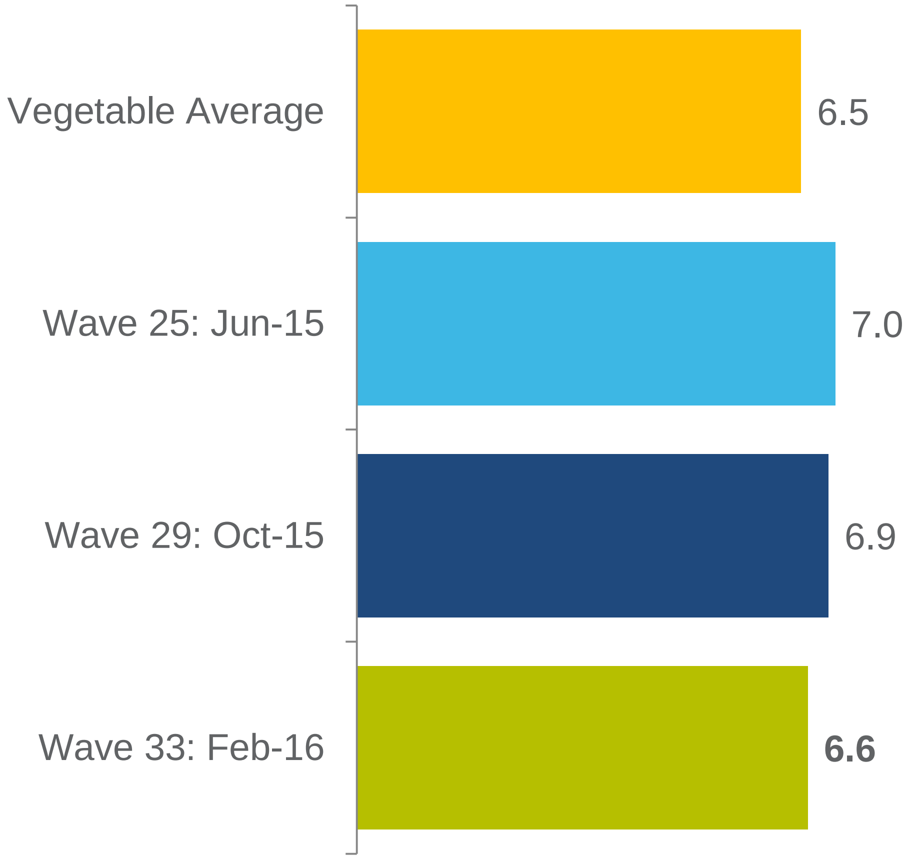
Accompanying Vegetables

Carrot	59% ▲
Potato	58% ▼
Broccoli	53% ▼
Sweet Potato	36% ▲
Pumpkin	35% –

Top 10 Cooking Styles	Wave 25	Wave 29	Wave 33
Steaming	61%	63%	**62%**
Stir frying	46%	45%	**50%**
Boiling	40%	41%	**42%**
Soup	32%	28%	**31%**
Microwave	21%	22%	**25%**
Baking	20%	18%	**23%**
Roasting	14%	17%	**20%**
Raw	16%	14%	**17%**
Slow Cooking	14%	14%	**13%**
Mashing	11%	9%	**10%**

Q9. How do you typically cook cauliflower?
Q10a. And when are you serving cauliflower which of the following do you also serve together with this?
Sample Wave 25 N=305, Wave 29 N=301, Wave 33 N=301

Importance of cauliflower provenance has declined over the last three waves, however still sits above the Vegetable Average. Interestingly, knowing that cauliflower is grown in Australian remains the most important provenance information to consumers and has increased this wave.



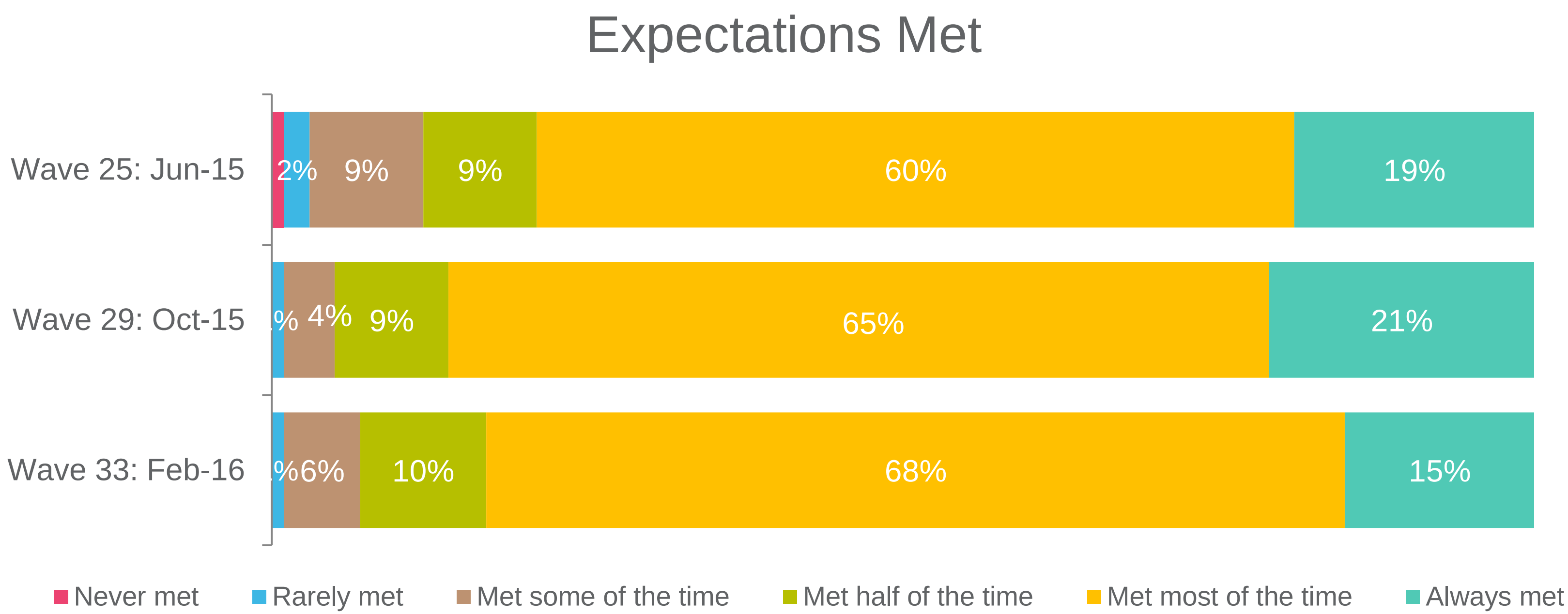
8.1

Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 25 N=305, Wave 29 N=301, Wave 33 N=301

Cauliflower is expected to remain fresh for around eight days once purchased, which has declined this wave. Expectations of freshness are being met most of the time.

Expected to stay fresh for **8.3** days

▲ 9.4 days, Wave 25
▲ 9.1 days, Wave 29



Q12. How long do you expect cauliflower to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy cauliflower?
Sample Wave 25 N=305, Wave 29 N=301, Wave 33 N=301

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

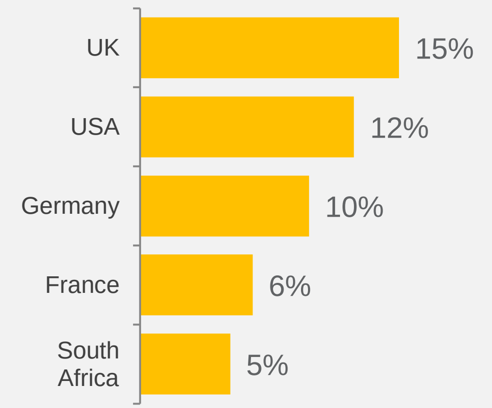
Cauliflower Product Launch Trends.

Cauliflower Global NPDs

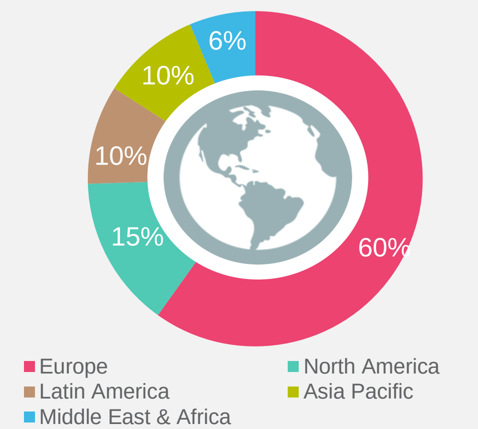
December 2015 – February 2016

There were 157 products launched in the past three months that contained cauliflower. Europe and North America were the main regions for launches, with UK and USA the key countries. Flexible packaging remained the most common format. Launches were predominately in fruit and vegetable, meals and sauces categories.

Country

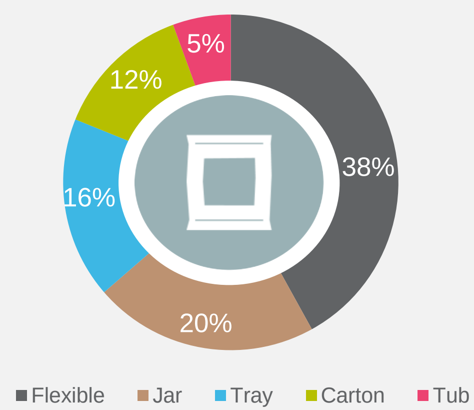


Region



157 Global NPDs

Top Pack Formats



Categories

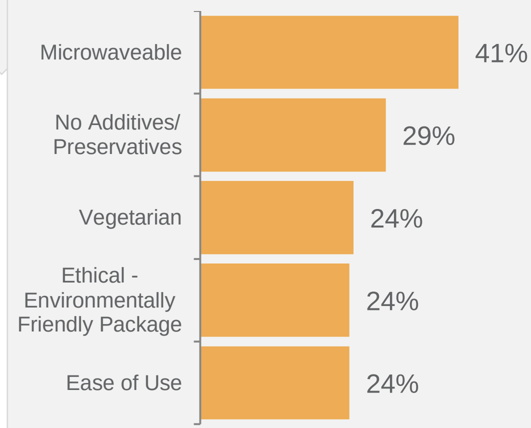
Fruit & Vegetables 32%

Meals 22%

Sauces & Seasonings 15%

Soup 8%

Top Claims



Cauliflower Product Launches:
Last 3 Months (December 2015 – February 2016)
Summary

- There were 157 products launched over the past 3 months that contained cauliflower as an ingredient, an increase from the previous wave.
- There were no cauliflower products launched in Australia in the past three months.
- More than half of the products were launched in Europe (60%), with UK and USA the key launch countries.
- Flexible (38%), jar (20%), and tray (16%) packaging were the top 3 pack formats.
- The top categories for launches were fruit and vegetables (32%), meals and meal centers (22%), and sauces and seasonings (15%).
- Convenience and health claims were typically used on products, including microwaveable (41%), no additives/preservatives (29%), and vegetarian (24%). These have been consistent with all previous waves tracked for cauliflower products.
- The most innovative cauliflower launch this wave was ready to cook cauliflower rice from Sweden. See following pages for examples of product launches.

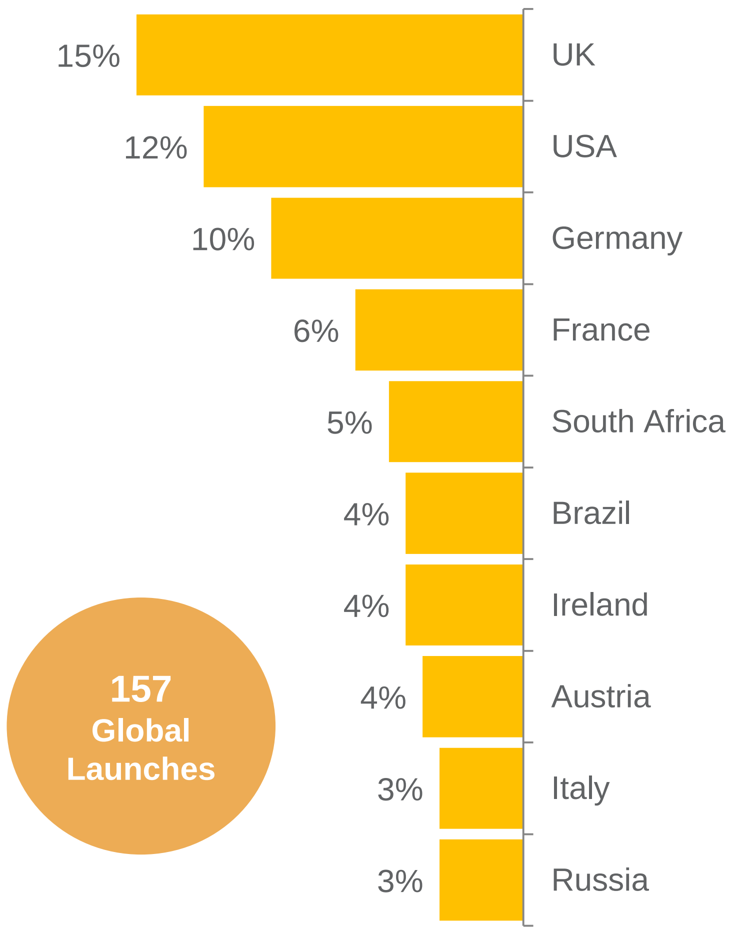
Source: Mintel (2016)

Cauliflower Launches

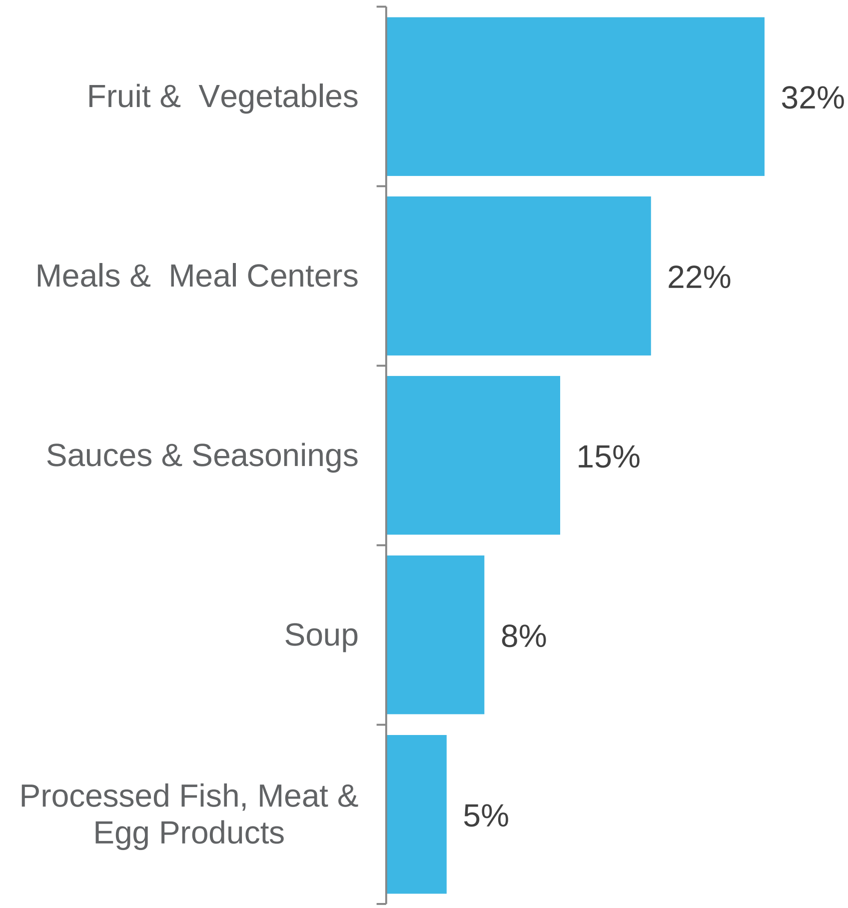
Country, Region & Categories

- The three key countries for cauliflower launches and innovation were[73] UK, USA and Germany.
- Products containing cauliflower were launched across multiple categories including fruit and vegetables, meals and sauces.

Top Launch Countries



Top Launch Categories



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Cauliflower Launches
Top Claims & Pack Formats Used

- Flexible packaging was the predominant format type for products launched in the last three months. Jars and trays were also common formats.
- Microwaveable was the key claim this wave, with no additives/preservatives and vegetarian also popular claims.

Pack Formats Used

Global	Flexible	38%
	Jar	20%
	Tray	16%
Europe	Flexible	36%
	Jar	17%
	Carton	16%

Top Claims Used

Global	Microwaveable	41%
	No Additives/Preservatives	29%
	Vegetarian	24%
Europe	Microwaveable	43%
	Vegetarian	28%
	No Additives/Preservatives	23%

Only shown for Global and Europe as sample (other regions sample size for launches were N<30)

Innovative Cauliflower Launches:
L3M (December 2015 – February 2016)

Genadendal Valley Mix Vegetables (South Africa)

Genadendal Valley Mix Vegetables have been repackaged in a newly designed 1kg pack. The mix comprises broccoli, butternut, cauliflower, carrot and green beans that have been hand-picked, steam blanched and frozen within hours of harvesting. They are described as juicy and quick to prepare, convenient and economical. The halal certified product can be heated in a microwave.

Claims:
Microwaveable, Economy, Halal, Time/Speed, Ease of Use

La Potagère Pea & Fresh Cheese Soup (France)

La Potagère Petits Pois et Fromage Frais (Pea & Fresh Cheese Soup) is made with 100% French origin ingredients by a company that supports over 200 families and participates in the development of the regional economy. By choosing ingredients produced nationally, the manufacturer endeavours to reduce their carbon footprint to a minimum. This limited edition product is ready to eat, can be quickly prepared in a microwave and retails in an FSC-certified 1L recyclable pack featuring a QR code.

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

Tuscan Garden Muffuletta Salad (USA)

Tuscan Garden Muffuletta Salad comprises select vegetables in soybean oil. The product is naturally free from gluten and lactose, and retails in a 16-fl. oz. fresh pack.

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

Exquisit Vegetable Trilogy (Czech Republic)

Exquisit Ruzicková Trilogie (Vegetable Trilogy) contains quick frozen cauliflower, broccoli and Romanesco broccoli. This microwaveable, premium product retails in a 750g pack.

Claims:
Microwaveable, Premium

Source: Mintel (2016)

Innovative Cauliflower Launches:

L3M (December 2015 – February 2016)

Aldi Chili con Carne Wrap to Go (Denmark)

Aldi Chili con Carne Wrap to Go consists of minced beef, corn and grilled peppers. The ready-to-eat product retails in a 170g pack bearing the FSC logo.

Claims:

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

Dimmidisí Fresc'al Dente Cauliflower (Spain)

Dimmidisí Fresc'al Dente Coliflor (Cauliflower) is now available. This ready to eat product is free from preservatives, is low in salt en saturated fat, can be microwaved, and retails in a 300g pack.

Claims:

No Additives/Preservatives, Microwaveable, Low/No/Reduced Sodium, Ease of Use, Low/No/Reduced Saturated Fat

Lotus Naturkost Organic Vegetable & Cheese Burger (Austria)

Lotus Naturkost Bio-Genießer-Burger Gemüse-Käse (Organic Vegetable & Cheese Burger) is made with vegetables, rice and Gouda cheese, and is said to be savoury, delicious and ready to eat. This naturally flavoured Bavarian product is manufactured with ingredients from organic cultivation and can be fried, microwave grilled or heated in the oven. It is suitable for vegetarians, and retails in a 200g pack featuring the BIO and the EU Green Leaf logos.

Claims:

Microwaveable, Organic, Vegetarian, Ease of Use

Sokra Norwegian Salad with Salmon (Czech Republic)

Sokra Norský Salát s Lososem (Norwegian Salad with Salmon) is now available. This product with cream and horseradish retails in a 220g pack.

Claims:

N/A

Source: Mintel (2016)

Innovative Cauliflower Launches:
L3M (December 2015 – February 2016)

Willowbrook Fine Foods Cauliflower & Broccoli Cheese (UK)

Willowbrook Fine Foods Cauliflower & Broccoli Cheese contains gently steamed cauliflower and broccoli florets with a velvety mature cheddar cheese sauce. This vegetarian product retails in a recyclable 350g pack.

Claims:
Vegetarian, Ethical - Environmentally Friendly Package

Vegibar Cauliflower Rice (Sweden)

Vegibar Blomkålsris (Cauliflower Rice) is washed and ready to cook. It is said to be processed in different ways and farmed by Swedish farmers to save time for the consumer. This product retails in a 300g pack.

Claims:
Time/Speed, Ease of Use

New Covent Garden Soup Co. White Christmas Soup with Truffle Infused Oil (UK)

New Covent Garden Soup Co. White Christmas Soup with Truffle Infused Oil is a soup of the month that is described as a white smooth and creamy soup blended with cauliflower, potato and single cream, finished off with aromatic truffle infused oil, white wine and a hint of white pepper. The microwaveable and vegetarian product is ready in five minutes, suitable for home freezing, and retails in a 600ml recyclable pack, featuring the FSC, Facebook and Twitter logos.

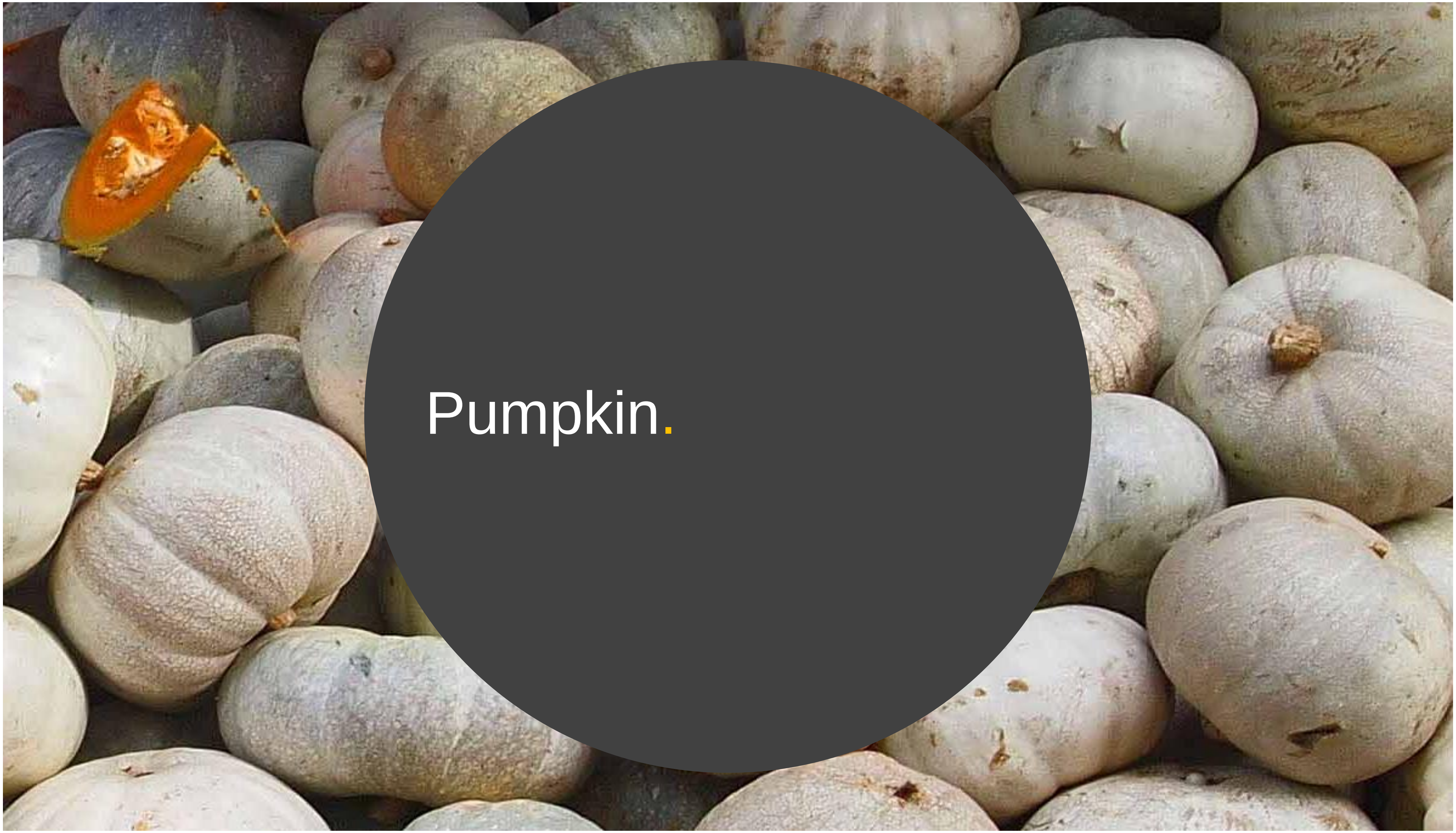
Claims:
Microwaveable, Vegetarian, Seasonal, Ethical - Environmentally Friendly Package, Time/Speed, Social Media

Hojaejun Vegetable Burger (South Korea)

Hojaejun Vegetable Burger is claimed to be a tender and light nutritious vegetarian snack and ideal for burgers, children's snack or lunch boxes. It is made of a variety of vegetables including potato, carrot, corn, pea, red paprika, cauliflower and broccoli, and free from meat. The easy to prepare food is microwaveable and retails in an 870g pack.

Claims:
Microwaveable, Vegetarian, On-the-Go, Ease of Use

Source: Mintel (2016)


Pumpkin.

Whilst consumption has remained relatively stable, consumption has increased this wave.

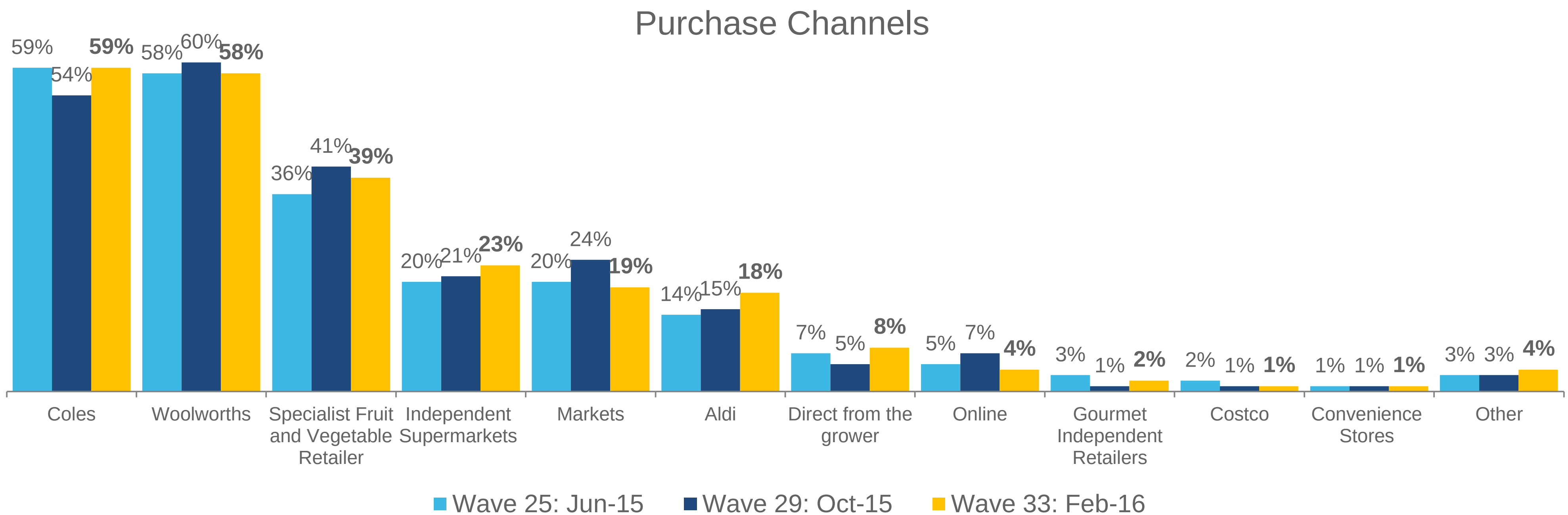
Pumpkin is generally purchased from mainstream and specialist retailers. Independent supermarkets and Aldi are experiencing an increasing uplift in purchase.

Average Purchase **3.1** times per month

▲ 3.2 times, Wave 25
▼ 3.0 times, Wave 29

Average Consumption **8.8** times per month

▼ 8.7 times, Wave 25
▼ 8.1 times, Wave 29



Q1. On average, how often do you purchase pumpkin?
Q2. On average, how often do you consume pumpkin?
Q5. From which of the following channels do you typically purchase pumpkin?
Sample Wave 25 N=304, Wave 29 N=305, Wave 33 N=304

Horticulture Innovation Australia

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

Average Spend and Price Sensitivity

Average weight of purchase

The average consumer typically purchases **1.3kg** of pumpkin, a slight increase from the previous wave.

▲ 1.4kg, Wave 25

▼ 1.2kg, Wave 29

Recalled last spend

Recalled last spend on pumpkin is **$3.20**, marginally lower than the previous wave.

— $3.20 Wave 25

▲ $3.30, Wave 29

Value for money

Consumers' perceived pumpkin good value for money **(6.6/10)**, consistent with the past wave.

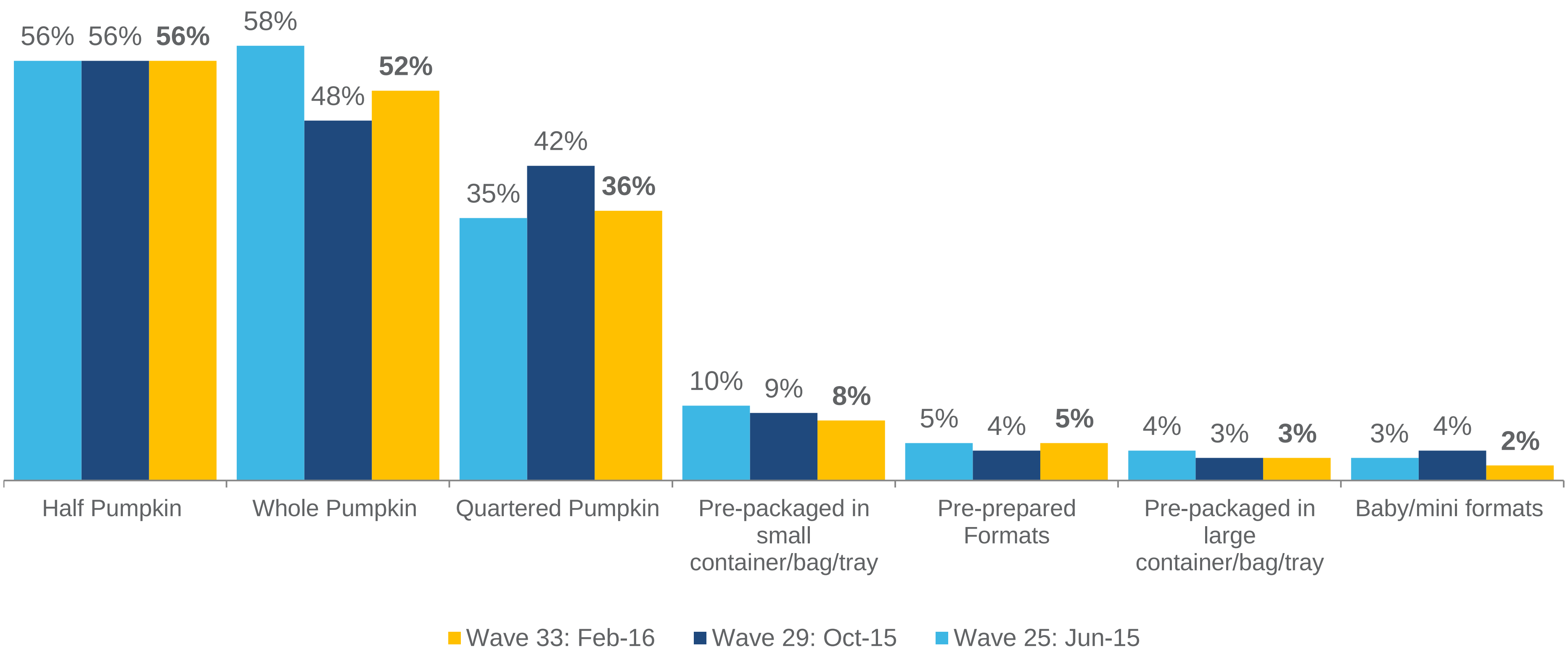
▲ 7.2/10, Wave 25

— 6.6/10, Wave 29

Q3. How much pumpkin 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 25 N=304, Wave 29 N=305, Wave 33 N=304

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

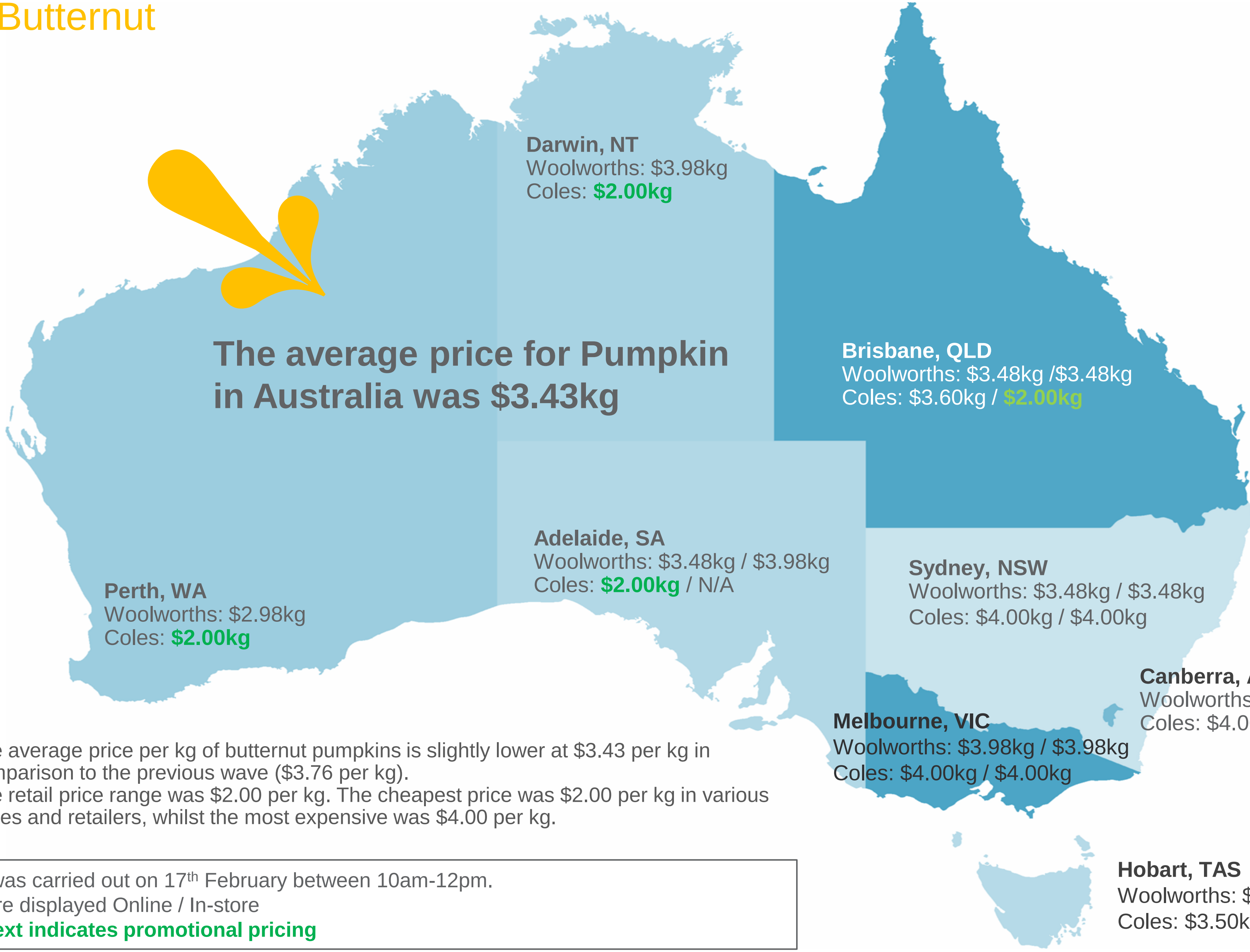
Half pumpkins are the most commonly purchased format. Whole pumpkins and quartered pumpkins are also popular, with pre-packaged formats only making up a small proportion of purchases.



Q4b. In what fresh formats do you typically purchase Pumpkin?
Sample Wave 25 N=304, Wave 29 N=305, Wave 33 N=304

Online and In-store Commodity Prices

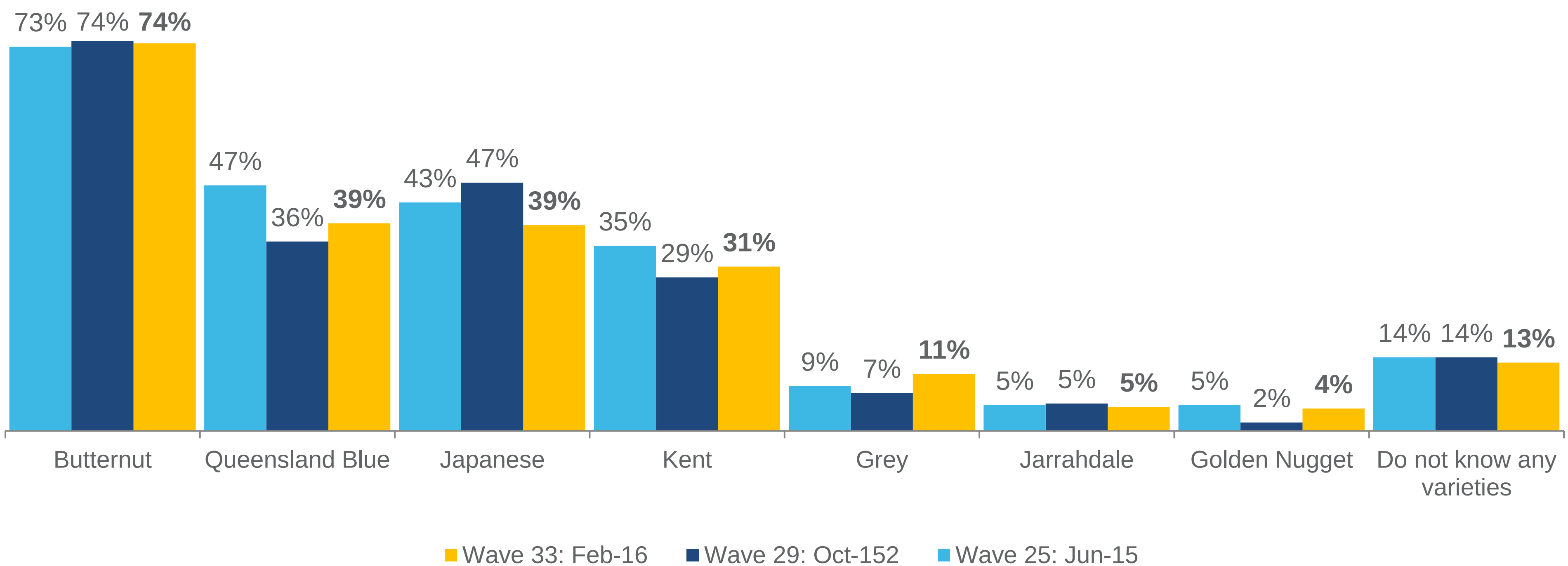
Butternut



- The average price per kg of butternut pumpkins is slightly lower at $3.43 per kg in comparison to the previous wave ($3.76 per kg).
- The retail price range was $2.00 per kg. The cheapest price was $2.00 per kg in various states and retailers, whilst the most expensive was $4.00 per kg.

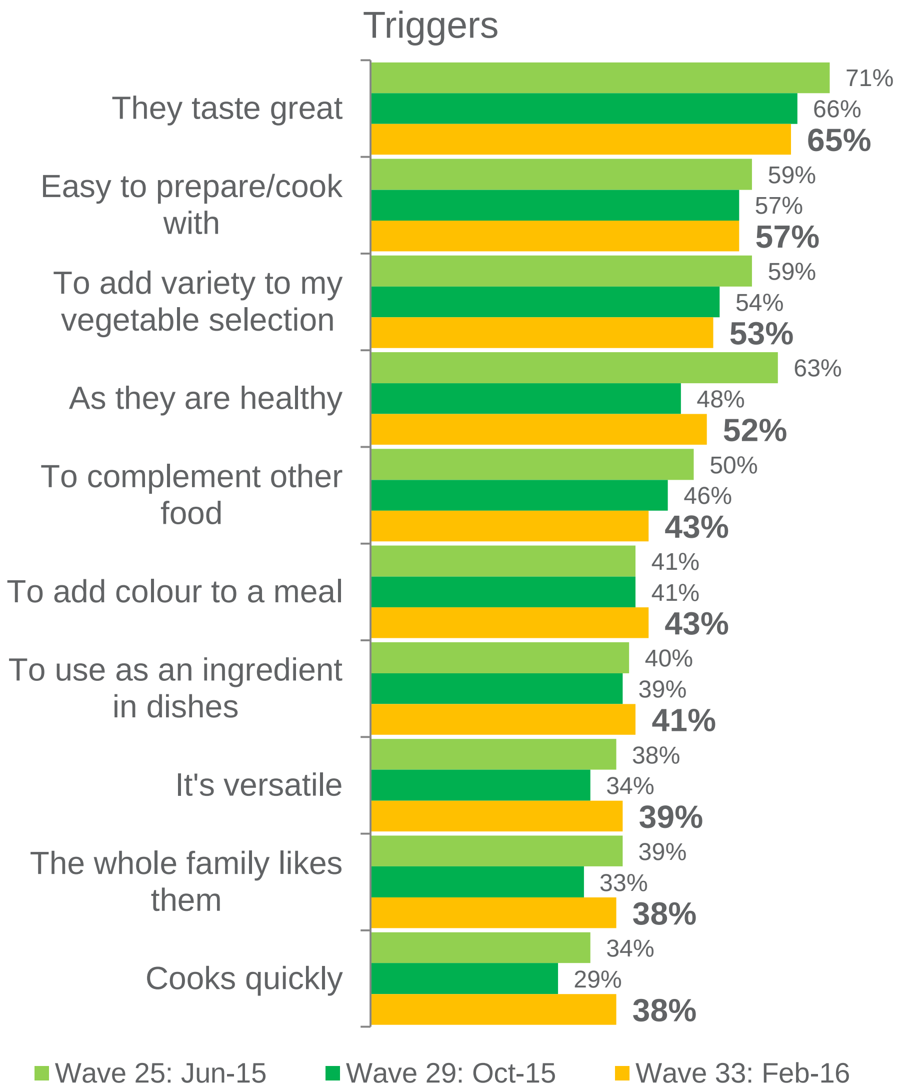
Pricing was carried out on 17th February between 10am-12pm.
Prices are displayed Online / In-store
Green text indicates promotional pricing

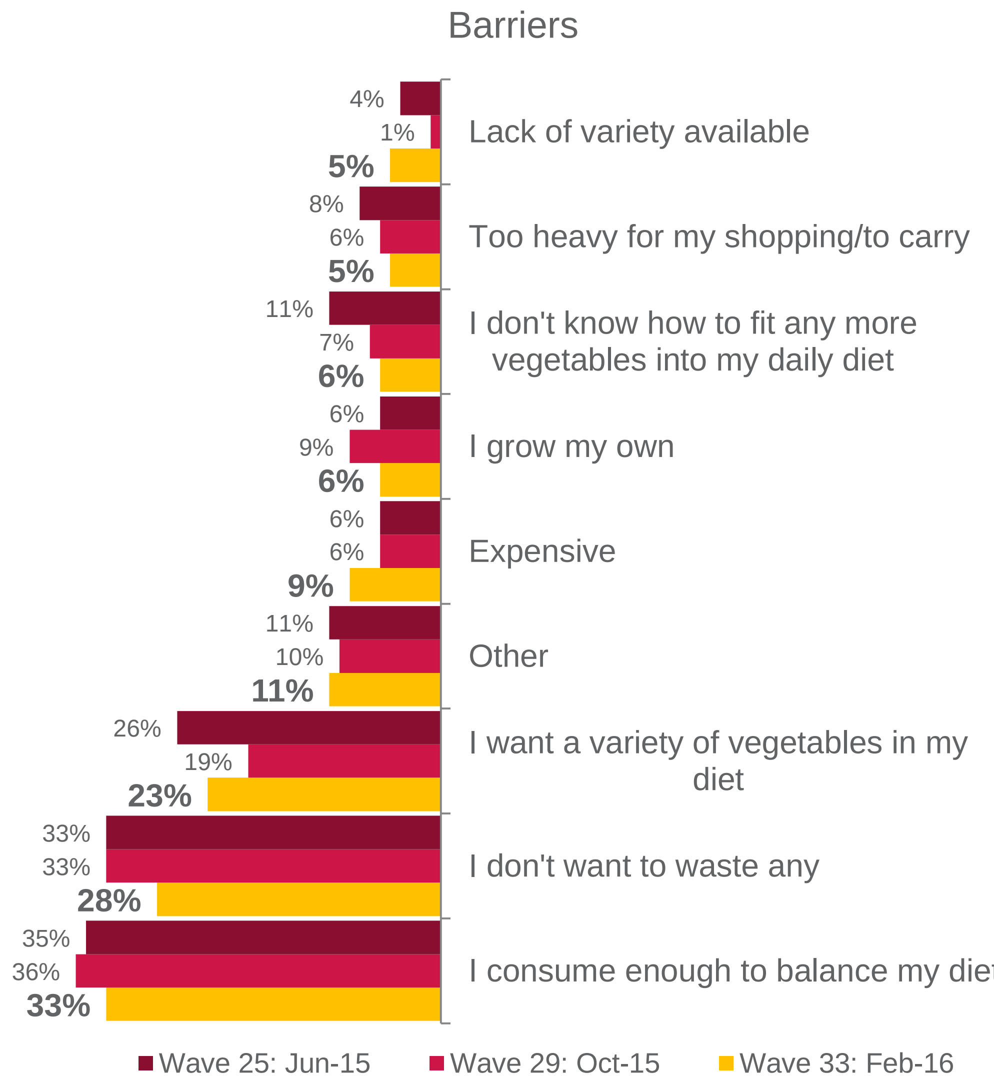
Consistent with past waves, spontaneous awareness of pumpkin types remains high, with positive recall across multiple types of pumpkin.



Q6a. What varieties of pumpkin are you aware of? (unprompted)
Sample Wave 25 N=304, Wave 29 N=305, Wave 33 N=304

Taste and ease of preparation are the key drivers of pumpkin purchase. Perceptions of consuming enough for needs and not wanting to waste any remain the key barriers to purchase.





Q7. Which of the following reasons best describes why you purchase pumpkin?
Q8. Which reason best describes why you don't buy pumpkin more often?
Sample Wave 25 N=304, Wave 29 N=305, Wave 33 N=304

Traditional Australian cuisine remains popular for pumpkin dishes, with minimal change over the last three waves.

Meal occasions generally occur at dinner time and for family meals.

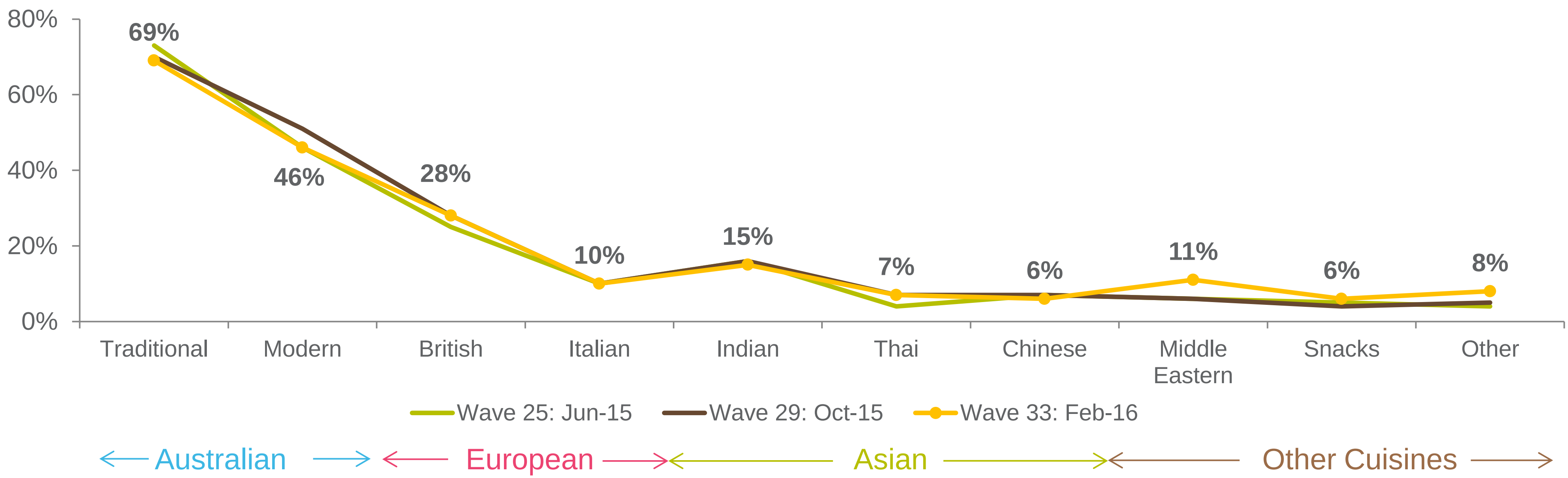
Top 5 Consumption Occasions

	Wave 29	Wave 33
Dinner	80%	**80%**
Family Meals	69%	**73%**
Weekday Meals	53%	**51%**
Weekend Meals	48%	**50%**
Quick Meals	25%	**23%**

17% used pumpkin when cooking a new recipe

▼ 16%, Wave 25
▼ 15%, Wave 29

Typical Cuisine Cooked



Q10. What cuisines do you cook/consume that use pumpkin?
Q11. Which of the following occasions do you typically consume/use pumpkin?
Sample Wave 25 N=304, Wave 29 N=305, Wave 33 N=304

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

Consumers prefer to serve pumpkin with potatoes and carrots. Roasting and soups remain the primary cooking styles.

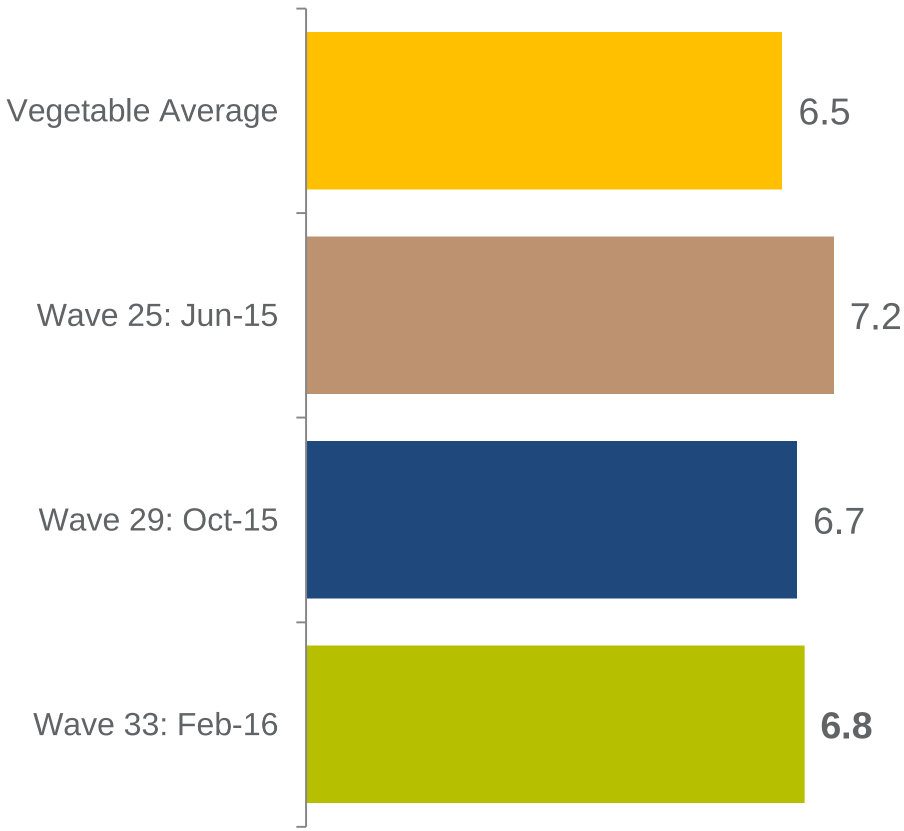
Accompanying Vegetables

- Potato 83%
- Carrot 58%
- Broccoli 46%
- Sweet Potato 46%
- Onion 38%

Top 10 Cooking Styles			
	Wave 25	Wave 29	Wave 33
Roasting	74%	75%	**77%**
Soup	61%	55%	**54%**
Mashing	49%	50%	**52%**
Baking	50%	44%	**46%**
Boiling	36%	36%	**38%**
Steaming	40%	37%	**38%**
Slow Cooking	21%	18%	**19%**
Microwave	16%	16%	**14%**
Stir frying	9%	10%	**10%**
Frying	8%	9%	**9%**

Q9. How do you typically cook pumpkin?
Q10a. And when are you serving pumpkin which of the following do you also serve together with this?
Sample Wave 25 N=304, Wave 29 N=305, Wave 33 N=304

Pumpkin provenance has marginally increased this wave, and sits above the Vegetable Average. Knowing their pumpkins are Australian grown remains the most important provenance information.

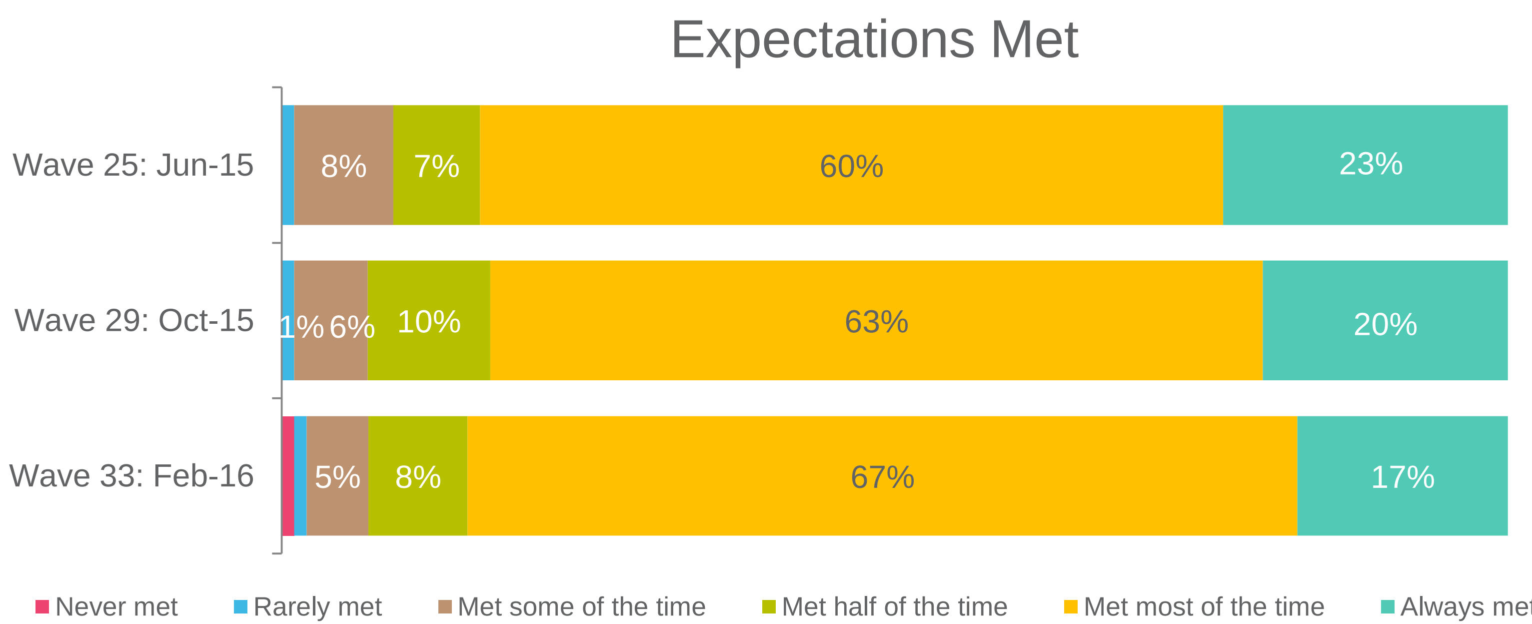


Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 25 N=304, Wave 29 N=305, Wave 33 N=304

Pumpkins are expected to stay fresh for 12 days once purchased. Consumer freshness expectations have marginally declined over the last three waves.

Expected to stay fresh for **11.9** days

▲ 12.5 days, Wave 25
▼ 11.5 days, Wave 29



Q12. How long do you expect pumpkin to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy pumpkin?
Sample Wave 25 N=304, Wave 29 N=305, Wave 33 N=304

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

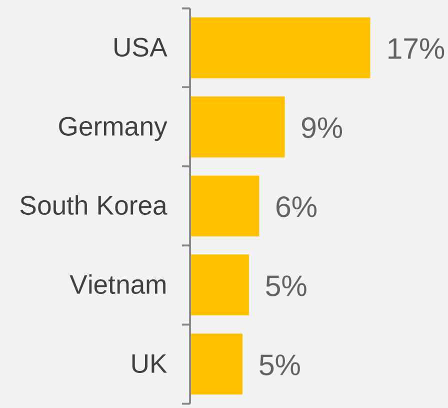
Pumpkin Product Launch Trends.

Pumpkin Global NPDs

December 2015 – February 2016

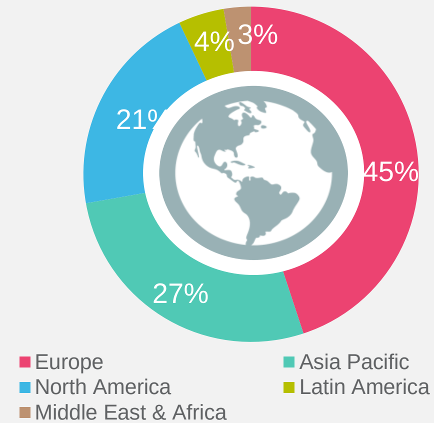
There were 839 products launched in the past three months that contained pumpkin, noticeably higher than the previous wave (559). Europe and Asia Pacific were the main regions for launches, while USA was the key country. Flexible packaging remained the most common format. Launches were predominately in snack and bakery categories.

Country

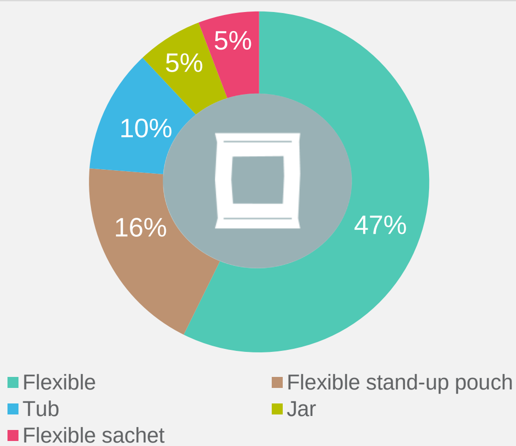


839 Global NPDs

Region



Top Pack Formats



Categories

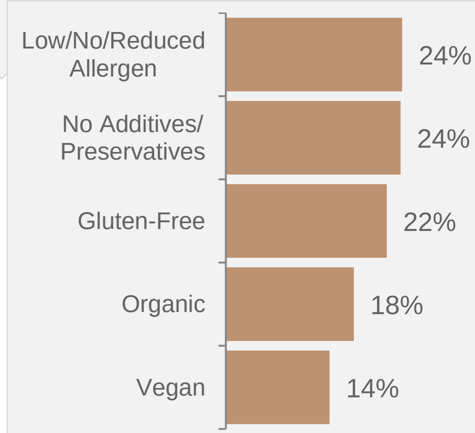
Snacks 27%

Bakery 18%

Breakfast Cereals 11%

Baby Food 5%

Top Claims



Pumpkin Product Launches:
Last 3 Months (December 2015 – February 2016)
Summary

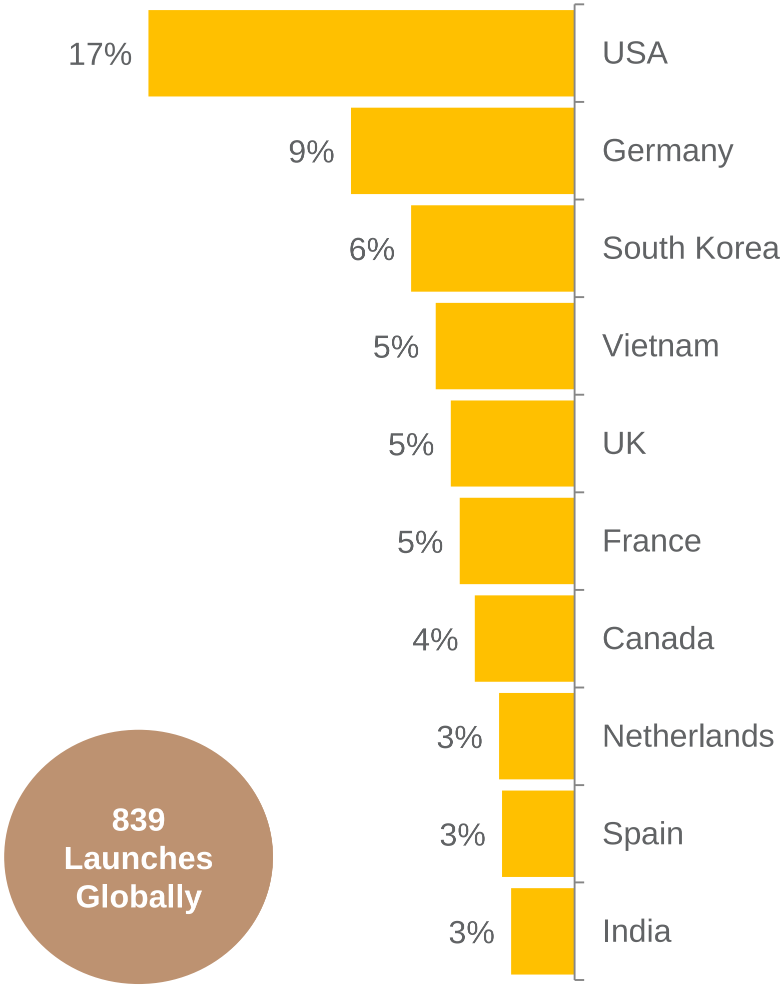
- A total of 839 products containing pumpkin as an ingredient were launched globally in the last 3 months, noticeably higher than the previous quarter (559 launches).
- There were 7 pumpkin launches in Australia this quarter.
- Europe (45%) and Asia Pacific (27%) were the top regions for launches. Key countries for innovation were USA (17%), Germany (9%), and South Korea (6%).
- Flexible packaging continues to be the widely used format for launches (47%).
- Top categories for product launches were snacks (27%), bakery goods (18%), and breakfast cereals (11%).
- Core claims for product launches globally were based around health (e.g. low allergen (24%), no additives/preservatives (24%) and gluten-free (22%).
- The most innovative product was a sweet pumpkin rice drink from South Korea (examples of products can be found at the end of the pumpkin trend report).

Source: Mintel (2016)

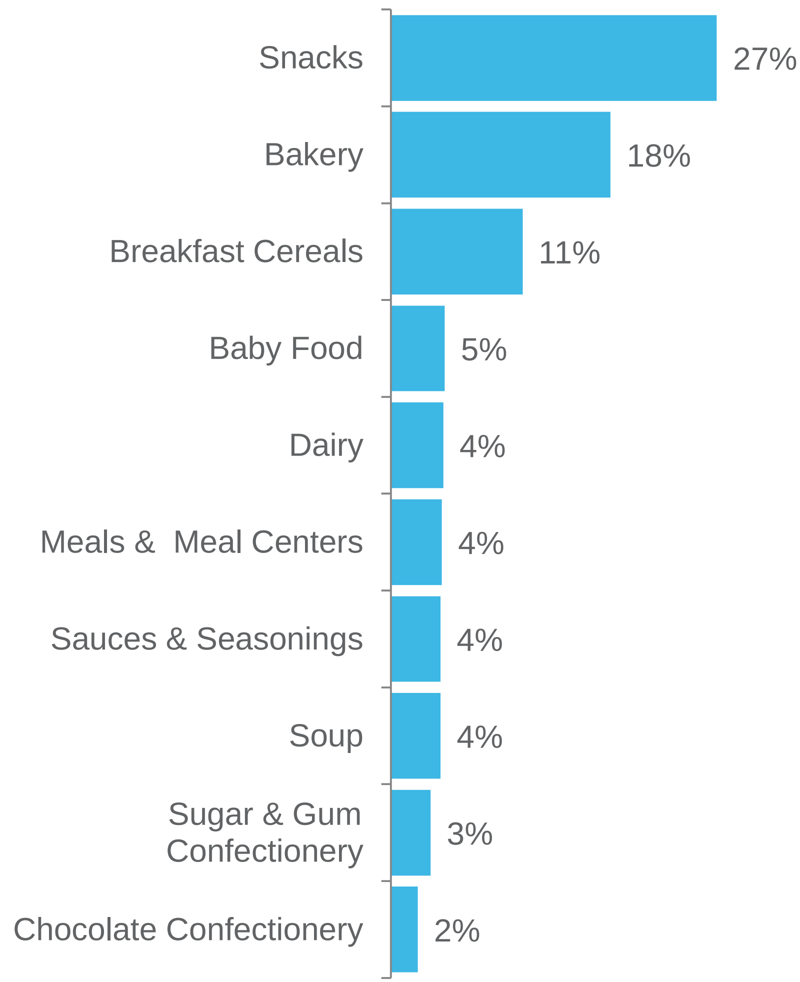
Pumpkin Launches
Country & Categories

- The most active country for launches in the last 3 months was the USA, followed by Germany and South Korea.
- Snacks remained the key category for launches, with bakery and breakfast cereals also common launches.

Top Launch Countries



Top Launch Categories



Pumpkin Launches

Top Claims & Pack Formats Used

- Pack formats were consistent across regions, with the primary format of choice being flexible packaging.
- Health claims were most commonly used globally, with allergen free and no additives being amongst the most common claims.

Pack Formats Used

Global	Flexible	47%
Global	Flexible stand-up pouch	16%
Global	Tub	10%
Europe	Flexible	47%
Europe	Tub	13%
Europe	Flexible stand-up pouch	10%
Asia Pacific	Flexible	55%
Asia Pacific	Flexible stand-up pouch	14%
Asia Pacific	Flexible sachet	10%

Top Claims Used

Global	Low/No/Reduced Allergen	24%
Global	No Additives/Preservatives	24%
Global	Gluten-Free	22%
Europe	Organic	27%
Europe	Low/No/Reduced Allergen	23%
Europe	Gluten-Free	20%
Asia Pacific	No Additives/Preservatives	33%
Asia Pacific	Seasonal	21%
Asia Pacific	Ease of Use	17%

Only regions with n >30 are displayed

Innovative Pumpkin Launches:
L3M (December 2015 – February 2016)

Well & Good Tasty View Freeze-Dried Vegetables (South Korea)

Well & Good Tasty View Freeze-Dried Vegetables are described as a convenient and healthy ingredient for DIY baby food. The product comprises 100% domestic environment-friendly vegetables, and retails in a 25g pack.

Claims:
Babies & Toddlers (0-4), Ethical - Environmentally Friendly Product, Ease of Use

Danone Vanilla and Strawberry Yogurt (Netherlands)

Danone Vanille en Aardbei Yogurt (Vanilla and Strawberry Yogurt) has been repackaged, and now retails in a newly designed 500g pack containing four 125g pots and featuring Disney Pixar's "The Good Dinosaur" movie graphics. The product comprises two flavours including vanilla and strawberry.

Claims:
Children (5-12), Event Merchandising

Xuan Hong Pumpkin Jam Pieces (Vietnam)

Xuan Hong Mut Bi (Pumpkin Jam Pieces) are now available. This product retails in a 250g pack.

Claims:
N/A

Scholetta Dark Chocolate with Mango-Passionfruit Paste (France)

Scholetta Chocolat Noir Fourré de Mangue Passion (Dark Chocolate with Mango-Passionfruit Paste) is filled with 30% ganache and 30% mango-passionfruit, and is made with UTZ certified cocoa. The product has been repackaged in a 130g pack.

Claims:
Ethical - Environmentally Friendly Product, Ethical - Human

Source: Mintel (2016)

Innovative Pumpkin Launches:
L3M (December 2015 – February 2016)

Orga Veggie Pop Snack (South Korea)

Orga Veggie Pop Snack is now available. This non-fried healthy snack is popped with Korean domestic vegetables including beet, broccoli and sweet pumpkin, and seasoned with salicornia salt. The product retails in a 32g pack.

Claims:
N/A

Kodiak Cakes Pumpkin Dark Chocolate Minute Muffins (USA)

Kodiak Cakes Pumpkin Dark Chocolate Minute Muffins are 100% wholegrain, all natural and contain no added fat. They are said to make a warm, fresh muffin in a minute with just the addition of water. The microwaveable product provides a delicious breakfast on the go, and retails in a 2.36-oz pack

Claims:
All Natural Product, Low/No/Reduced Fat, Microwaveable, Wholegrain, On-the-Go, Time/Speed, Ease of Use

Kee Wah Bakery Handmade Crunchy Pumpkin Seed Candy (Hong Kong)

Kee Wah Bakery Handmade Crunchy Pumpkin Seed Candy is new to the range. The product retails in a pack containing 18 pieces.

Claims:
N/A

Nothin' But Cherry Cranberry Almond Granola Cookies (USA)

Nothin' But Cherry Cranberry Almond Granola Cookies have been repackaged. The 100% natural cookies are oven baked, packed with nuts, oats and berries, and are free from fillers, eggs, butter, wheat, gluten and GMO. The kosher certified, premium product retails in a 1.4-oz. pack bearing the Twitter and Facebook logos.

Claims:
All Natural Product, Kosher, Premium, Gluten-Free, Low/No/Reduced Allergen, GMO-Free, Social Media

Source: Mintel (2016)

Innovative Pumpkin Launches:
L3M (December 2015 – February 2016)

Mekhala Pumpkin Black Pepper Dressing (Thailand)

Mekhala Pumpkin Black Pepper Dressing is a creamy, dairy- and egg-free dressing, made with beta carotene-containing pumpkin. It is said to be a great ranch or mayonnaise substitute and can be used on salads, asparagus, beans, broccoli, meat or pasta.

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

Nase Kase Speciál Pumpkin Spread (Czech Republic)

Nase Kase Speciál Dýnová (Pumpkin Spread) is a fresh, vegetable spread made with naturally gluten-free cereals. It contains no chemical additives and soya, and can be enjoyed with bread or vegetables. This ready-to-eat vegan product is made with pumpkin, beans and rosemary, and retails in a 150g pack.

Claims:
No Additives/Preservatives, Gluten-Free, Low/No/Reduced Allergen, Vegan, Ease of Use, No Animal Ingredients

Haneulcheong Sweet Pumpkin Rice Drink (South Korea)

Haneulcheong Sweet Pumpkin Rice Drink is made with 12 grains including rice, black bean, wheat, red bean, hog millet, foxtail millet, sorghum, brown rice, black sesame, barley, black rice and adlay. The product contains 3.4% sweet pumpkin and is said to be good for health and provide a rich taste. It retails in a 1.2L pack featuring the HACCP logo.

Claims:
N/A

Acure Lavender + Sacred Lotus Stem Cell Calming Body Lotion (USA)

Acure Lavender + Sacred Lotus Stem Cell Calming Body Lotion has been relaunched under a new brand name (previously Acure Organics Calming Lavender + Lotus Flower Body Lotion) and is now available in a newly designed 8-fl. oz. pack.

Claims:
No Additives/Preservatives, Organic, Botanical/Herbal, Gluten-Free, Non-Comedogenic, Ethical - Environmentally Friendly Product, Ethical - Animal, Moisturising / Hydrating, Protects Against Elements*, Paraben Free, Vegan, No Animal Ingredients, Sulphate/Sulfate Free, Silicone Free, Mineral Oil/Petroleum Free

Source: Mintel (2016)

Top Australian Pumpkin Launches:
L3M (December 2015 – February 2016)

Four'N Twenty Stacked Super Chunky Steak & Veg Pie

BetterBump Oat Berry With Dark Chocolate Bar For Maternal Nutrition And Lactation

Thinkfood Munch Pumpkin Seed Snack

Ivan's Finest Pies And Pastries Chicken & Vegetable Pie

Phillippa's Honey & Orange Roasted Nuts

Irrewarra Granola Co. Australia Original Recipe Granola

Source: Mintel (2016)

Baby Broccoli.

There were no products launched containing baby broccoli as an ingredient in the past three months.

Purchase has remained consistent this wave, whilst consumption has declined.

Baby Broccoli is typically purchased from Woolworths and Coles, with an upwards trend in purchase from specialist vegetable retailers.

Average Purchase **3.4** times per month

3.9 times, Wave 25

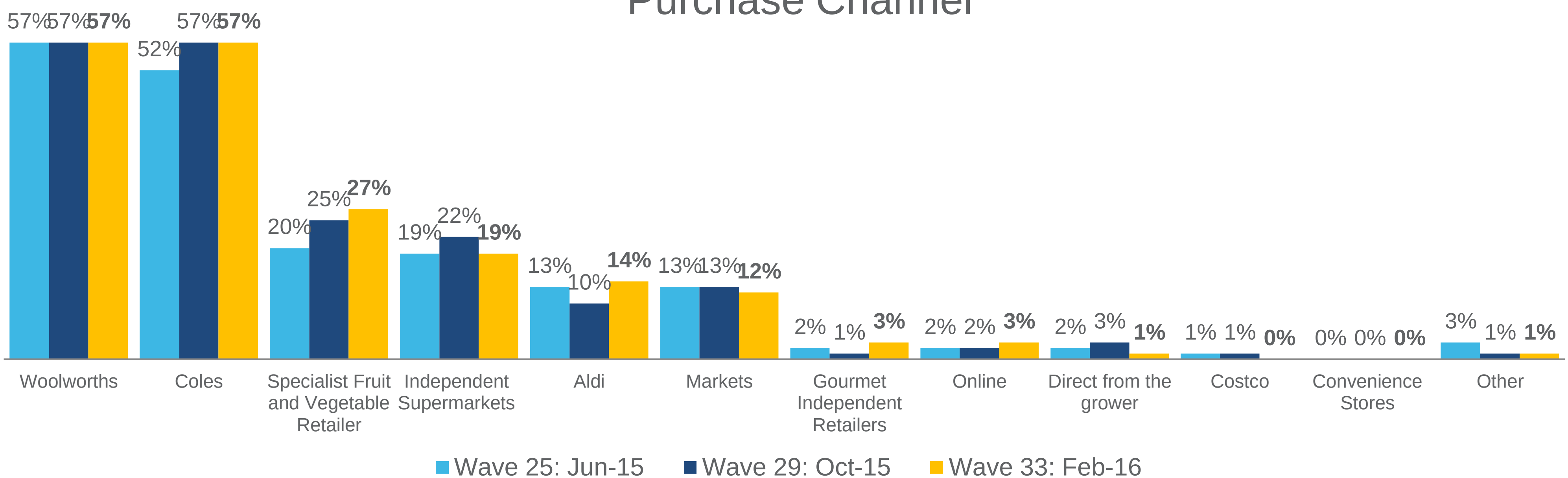
3.4 times, Wave 29

Average Consumption **6.1** times per month

7.2 times, Wave 25

6.8 times, Wave 29

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 25 N=205, Wave 29 N=202, Wave 33 N=201

Horticulture Innovation Australia
colmar brunton.

Average Spend and Price Sensitivity

Average weight of purchase

The average consumer typically purchases **0.5kg** of Baby Broccoli, consistent with the previous wave.

▲ 0.6kg, Wave 25
— 0.5kg, Wave 29

Recalled last spend

The average recalled last spend is **$3.40** in February 2016, slightly lower than the previous waves.

▲ $3.60, Wave 25
▲ $3.60, Wave 29

Value for money

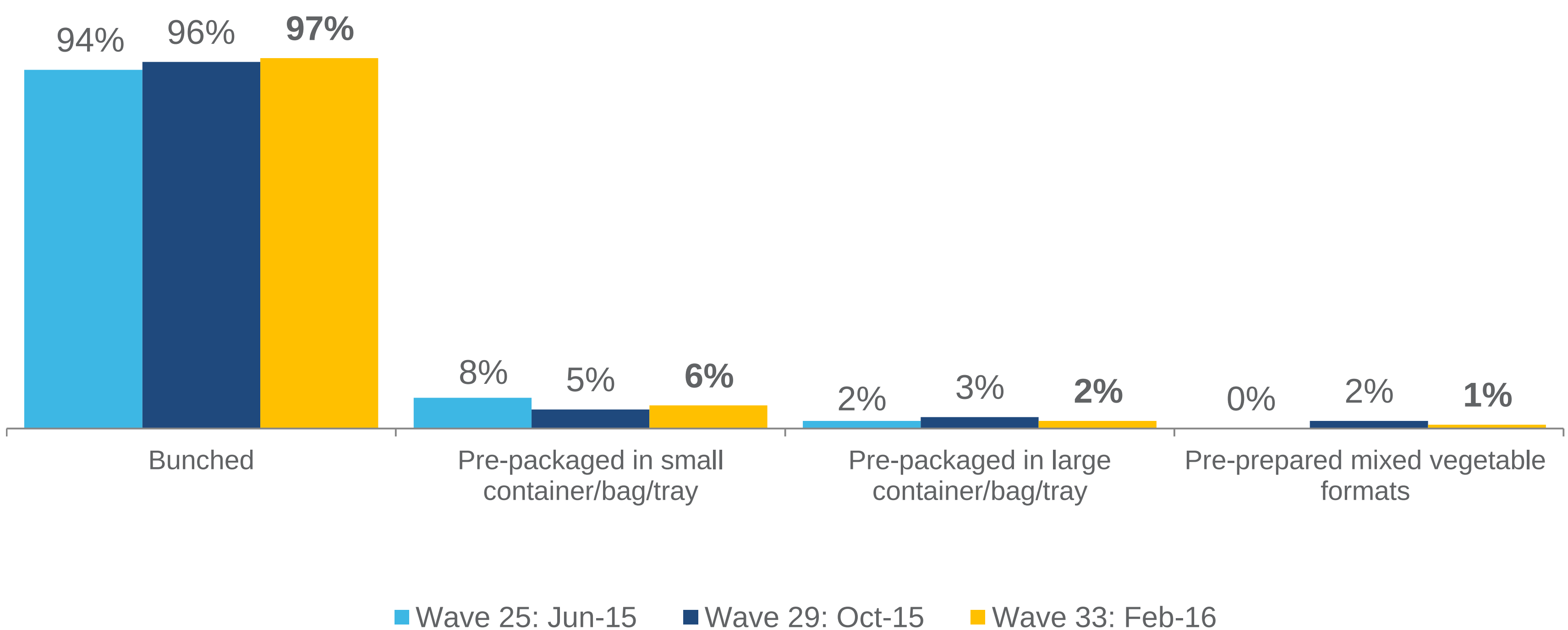
On average, consumers perceive Baby Broccoli to be moderate value for money **(6.0/10).**

— 6.0/10, Wave 25
▲ 6.1/10, Wave 29

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 25 N=205, Wave 29 N=202, Wave 33 N=201

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

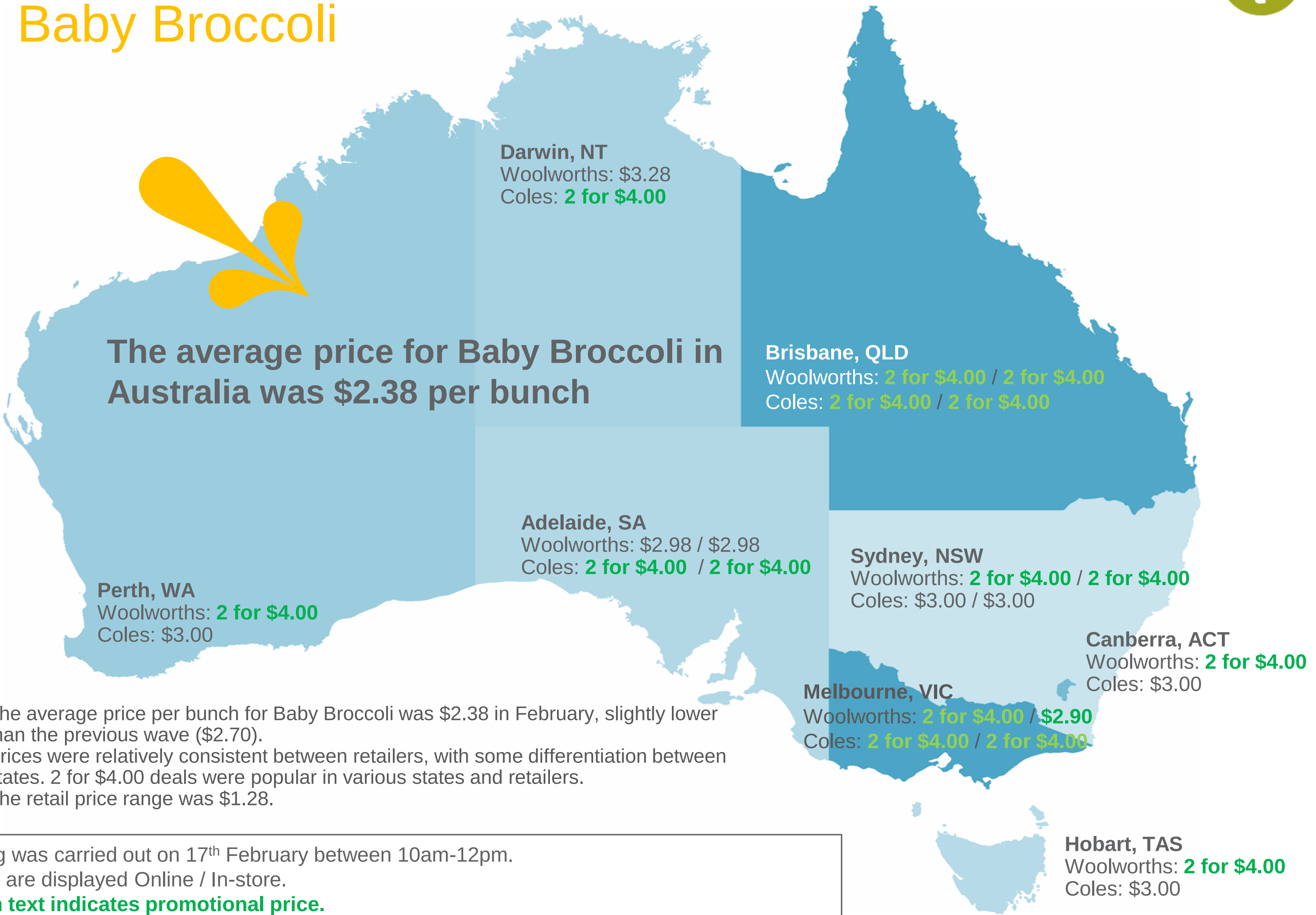
Bunched Baby Broccoli is the dominant format purchased by consumers, consistent with the previous waves.



Q4b. In what fresh formats do you typically purchase <commodity>?
Sample Wave 25 N=205, Wave 29 N=202, Wave 33 N=201

Online and In-store Commodity Prices

Baby Broccoli



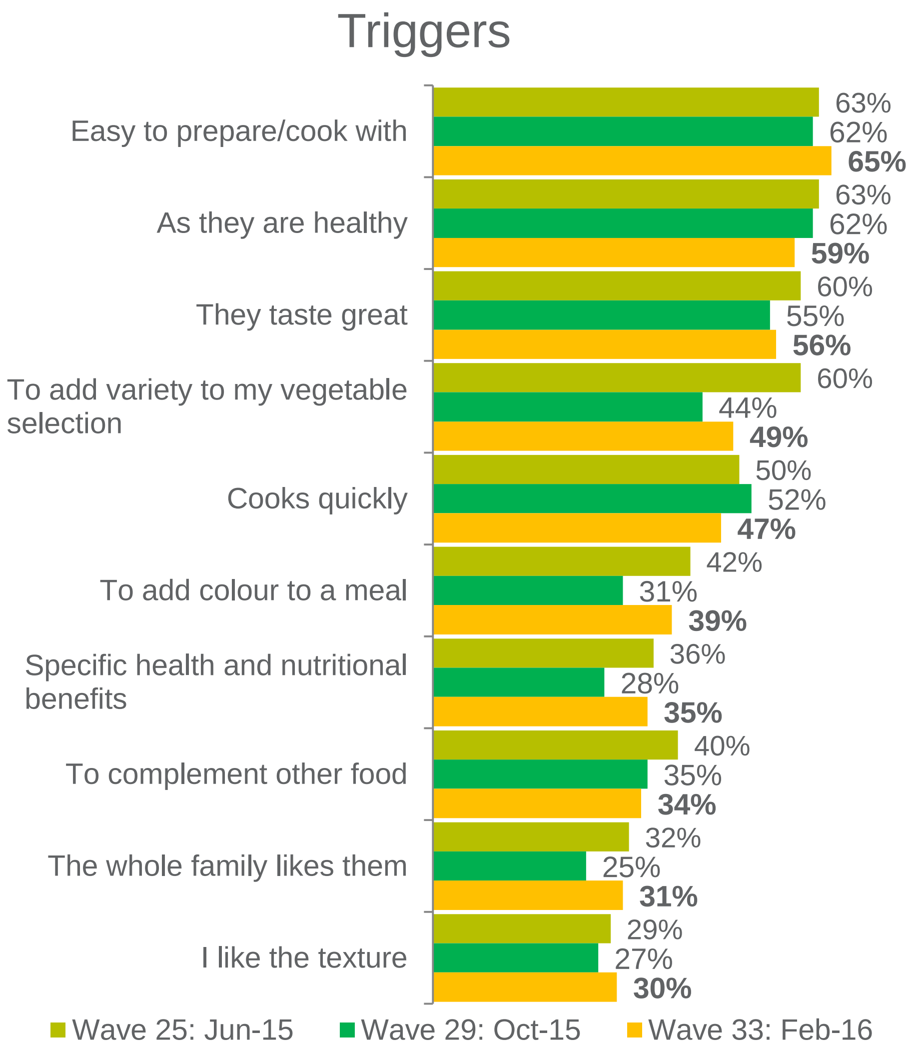
- The average price per bunch for Baby Broccoli was $2.38 in February, slightly lower than the previous wave ($2.70).
- Prices were relatively consistent between retailers, with some differentiation between states. 2 for $4.00 deals were popular in various states and retailers.
- The retail price range was $1.28.

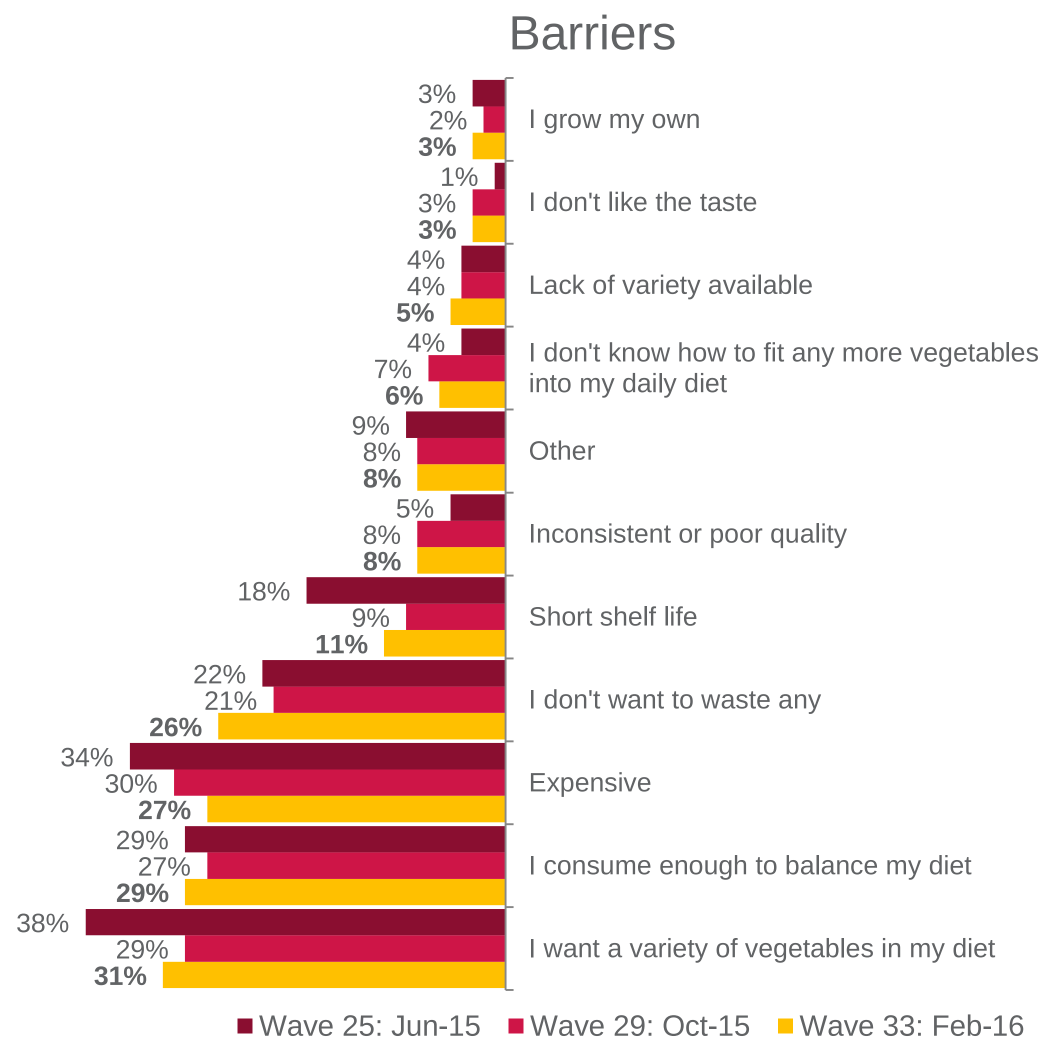
Pricing was carried out on 17th February between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates promotional price.

Spontaneous Awareness

85% of consumers were unaware of any varieties of baby broccoli, which is consistent with the past wave.

Ease of preparation and health remain the key drivers for Baby Broccoli purchase. Wanting a variety of vegetables and already consuming enough in their diet are the key barriers. Positively, expense has been declining as a barrier to purchase over the last three waves.





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 25 N=205, Wave 29 N=202, Wave 33 N=201

Australian and Chinese cuisines are the most popular ways of cooking baby broccoli dishes, consistent with the previous waves.

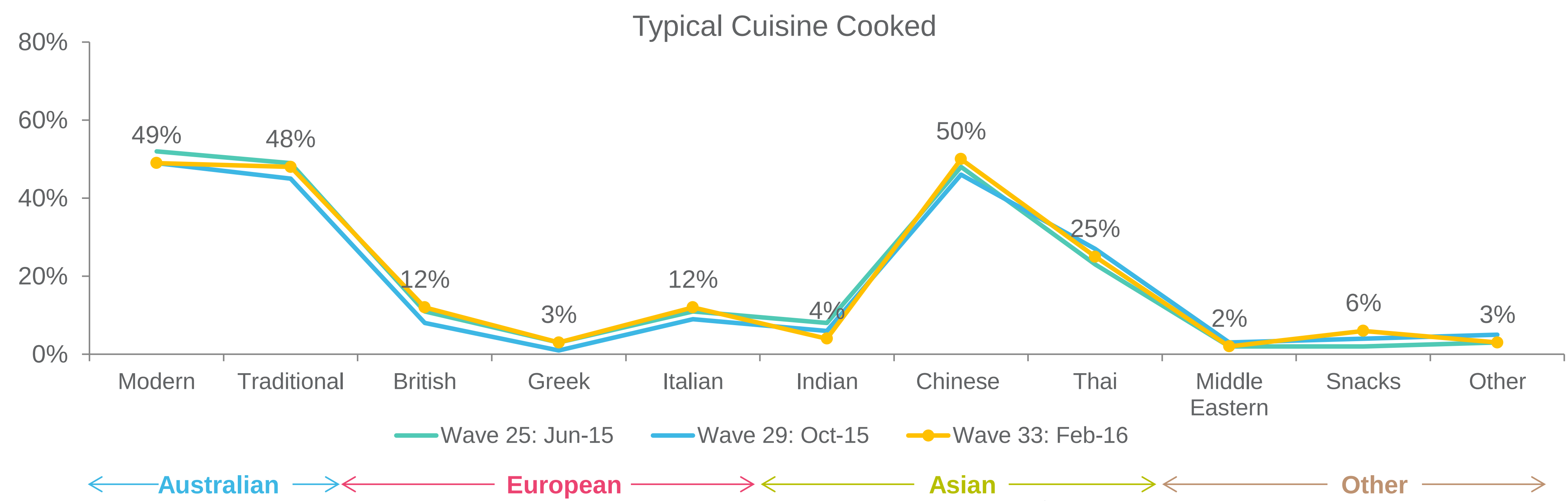
Key meal occasions are primarily centred around dinner and family meals.

Top 5 Consumption Occasions

	Wave 29	Wave 33
Dinner	70%	**76%**
Family Meals	55%	**57%**
Quick Meals	39%	**44%**
Weekday Meals	40%	**43%**
Weekend Meals	29%	**31%**

13% used Baby Broccoli when cooking a new recipe

▼ 12%, Wave 29



Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?
Sample Wave 25 N=205, Wave 29 N=202, Wave 33 N=201

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

Consumers continue to serve baby broccoli with carrots and potatoes. Steaming and stir frying remain the primary cooking styles. This wave saw a noticeable increase in microwaving as a cooking style.

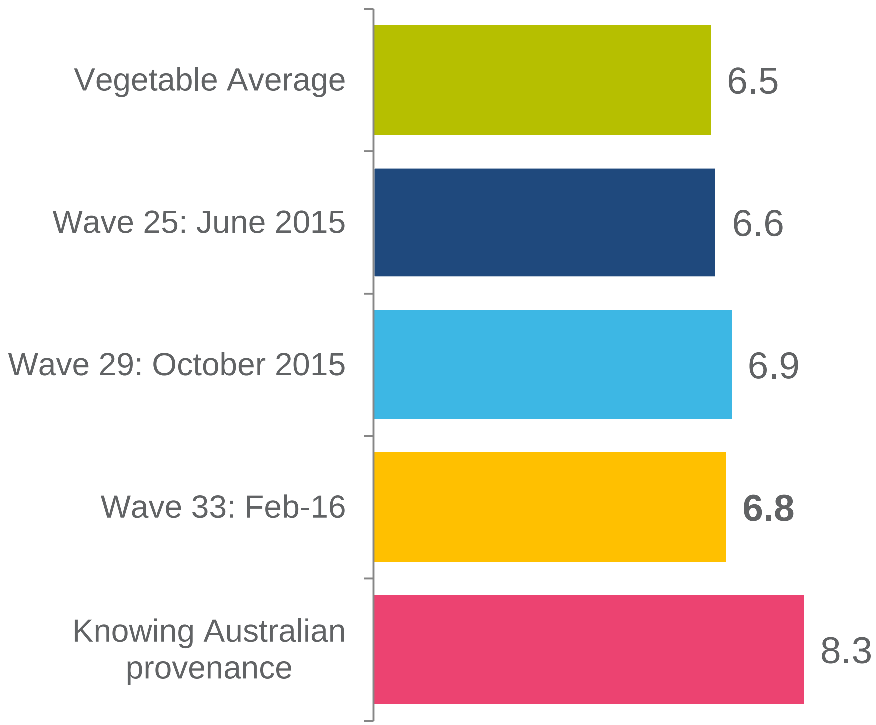
Accompanying Vegetables

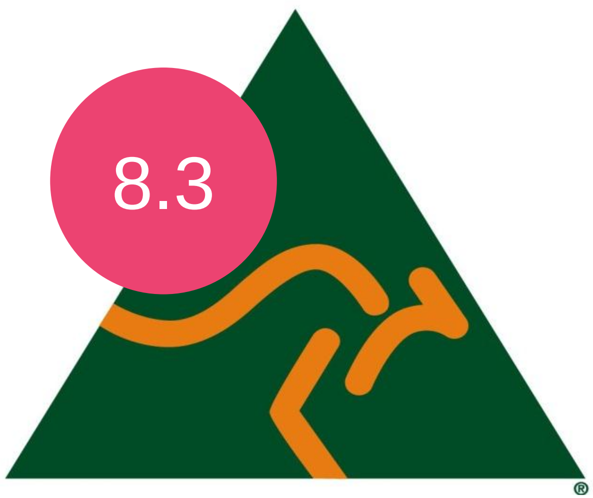
Carrot	61%
Potatoes	45%
Sweet Potato	28%
Cauliflower	26%
Onion	26%

Top 10 Cooking Styles			
	Wave 25	Wave 29	Wave 33
Steaming	64%	62%	**63%**
Stir frying	47%	47%	**54%**
Microwave	24%	21%	**29%**
Boiling	24%	31%	**27%**
Sautéing	14%	10%	**14%**
Raw	3%	9%	**6%**
Roasting	3%	4%	**6%**
Frying	7%	6%	**6%**
Slow Cooking	8%	4%	**5%**
Soup	8%	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 25 N=205, Wave 29 N=202, Wave 33 N=201

General provenance is important to consumers. However, they are more interested in knowing that baby broccoli is grown in Australia, which has remained consistent over the last three months.





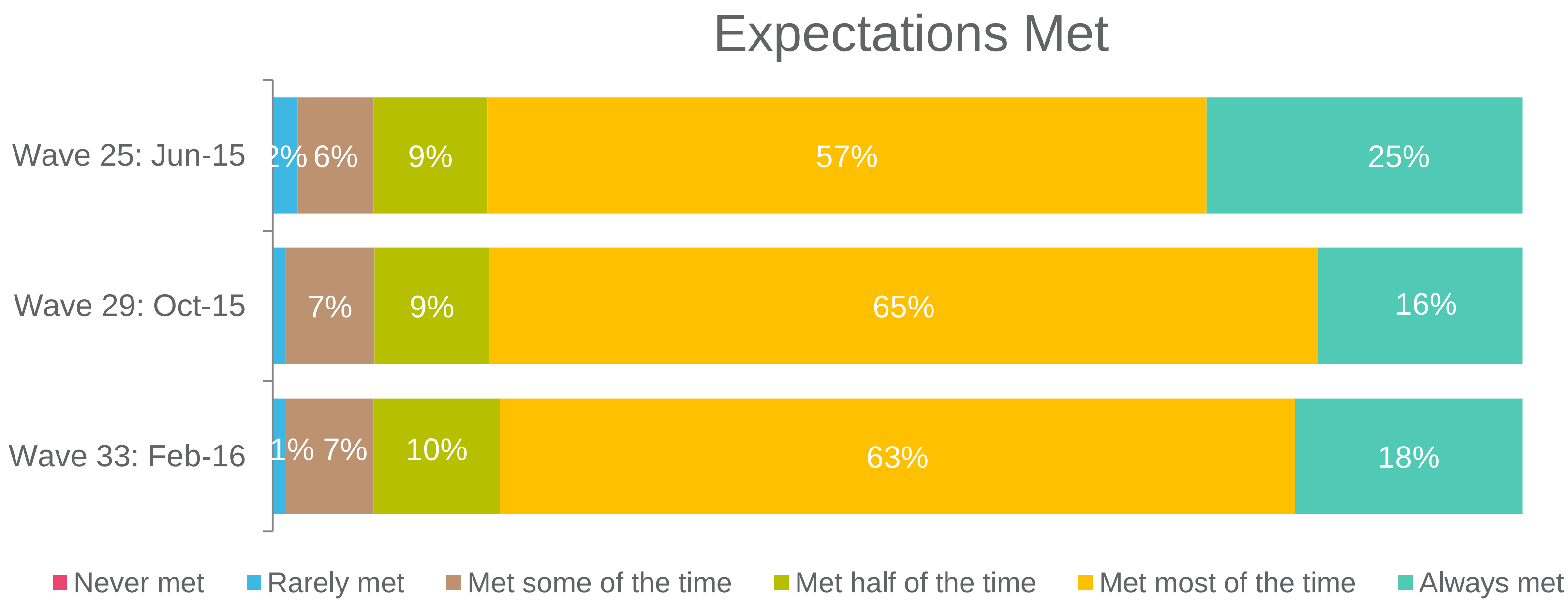
Q14. When purchasing Broccolini/Baby Broccoli, how important is Provenance to you?
(that is, knowing where the product is grown/where it comes from)
Q15. And when purchasing Broccolini/Baby Broccoli, how important is that it is grown in Australia?
Mean scores out of 10.
Sample Wave 25 N=205, Wave 29 N=202, Wave 33 N=201

Consumers expect baby broccoli to remain fresh for around six days once purchased.

Freshness expectations of baby broccoli are being met most of the time, consistent with the previous wave.

Expected to stay fresh for **6.1** days

▼ 6.3 days, Wave 25
▼ 6.3 days, Wave 29



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 25 N=205, Wave 29 N=202, Wave 33 N=201

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

Silverbeet.

Average purchase and consumption of silverbeet have both increased this wave.

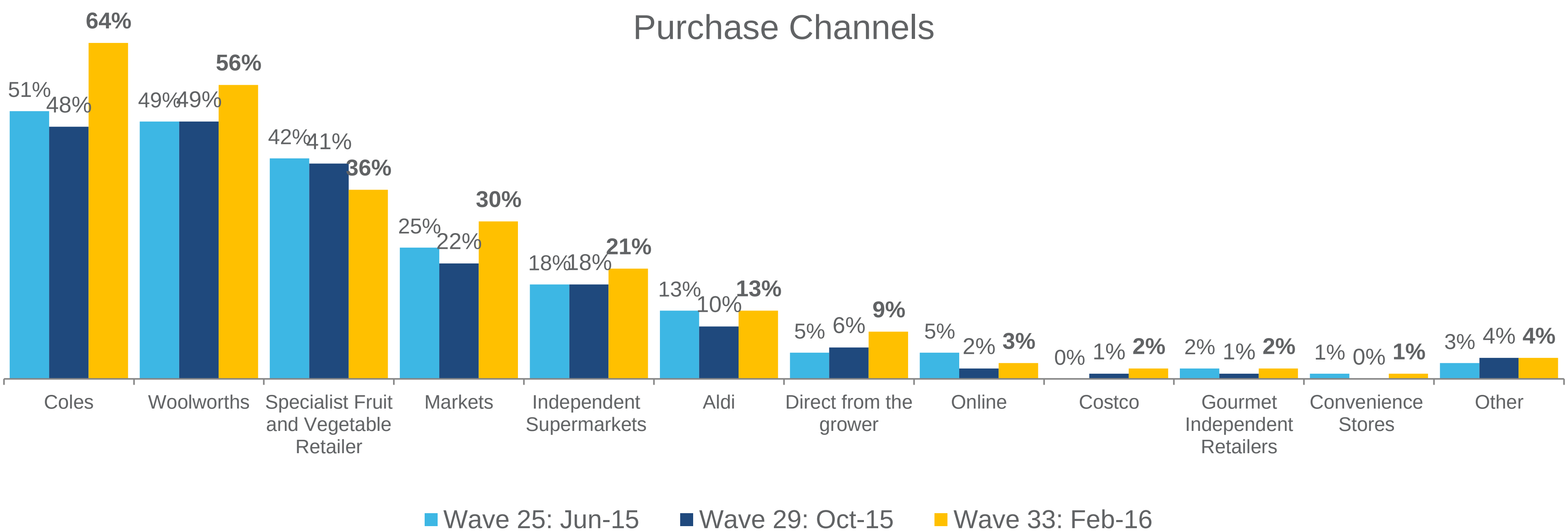
There has been a noticeable increase in purchase from mainstream retailers and markets, whilst there has been a continuous decline from specialist vegetable retailers.

Average Purchase **3.7** times per month

▲ 3.9 times, Wave 25
▼ 3.1 times, Wave 29

Average Consumption **6.7** times per month

▲ 8.1 times, Wave 25
▲ 6.8 times, Wave 29



Q1. On average, how often do you purchase silverbeet?
Q2. On average, how often do you consume silverbeet?
Q5. From which of the following channels do you typically purchase silverbeet?
Sample Wave 25 N=203, Wave 29 N=204, Wave 33 N=200

▼: 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 **0.8kg** of silverbeet, consistent with the last wave.

▼ 0.7kg, Wave 25
— 0.8kg, Wave 29

Recalled last spend

Recalled last spend on silverbeet is **$3.40**, remaining stable from with the previous wave.

▼ $3.30, Wave 25
— $3.40, Wave 29

Value for money

Consumers' perceived value for money is relatively good **(6.5/10)**, again consistent with the previous wave.

▲ 6.9/10, Wave 25
— 6.5/10, Wave 29

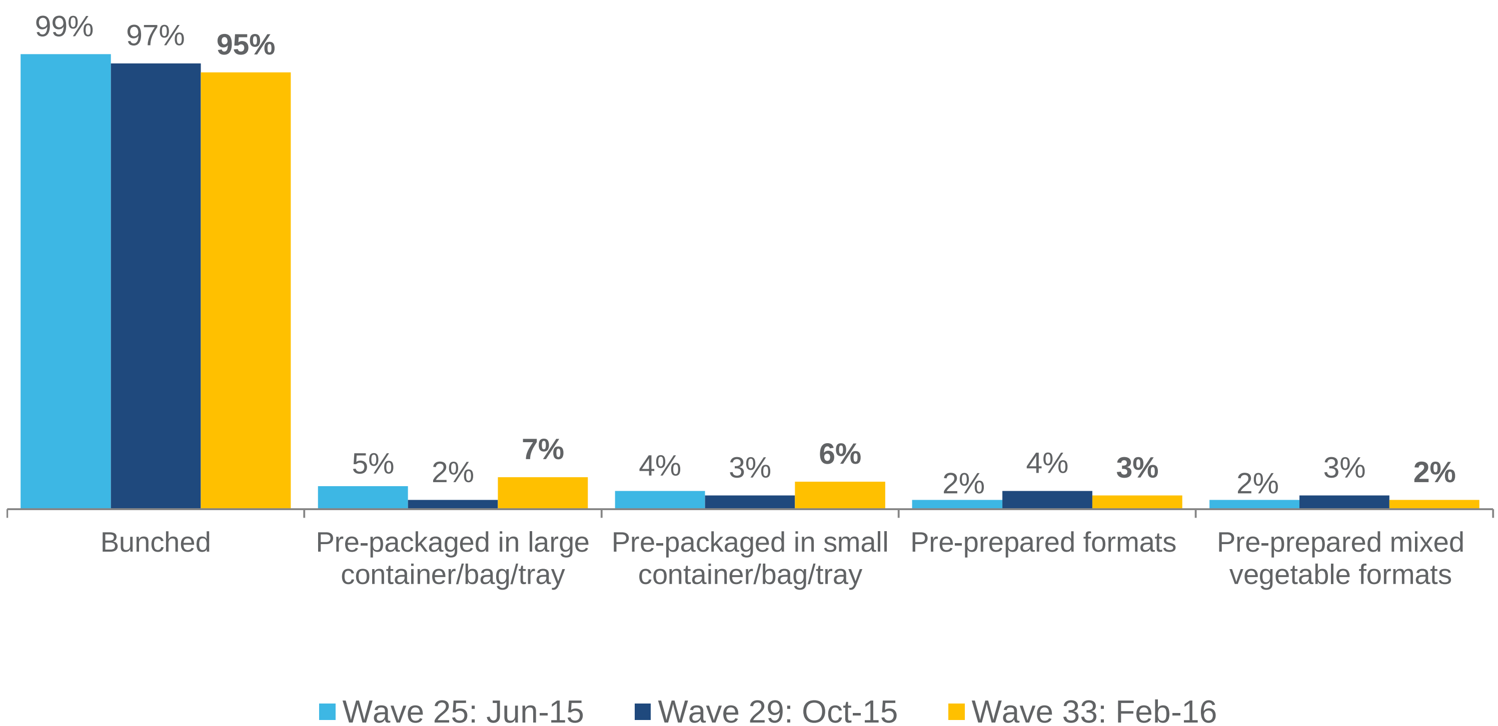
Q3. How much silverbeet do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 25 N=203, Wave 29 N=204, Wave 33 N=200

Horticulture Innovation Australia

colmar brunton.

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

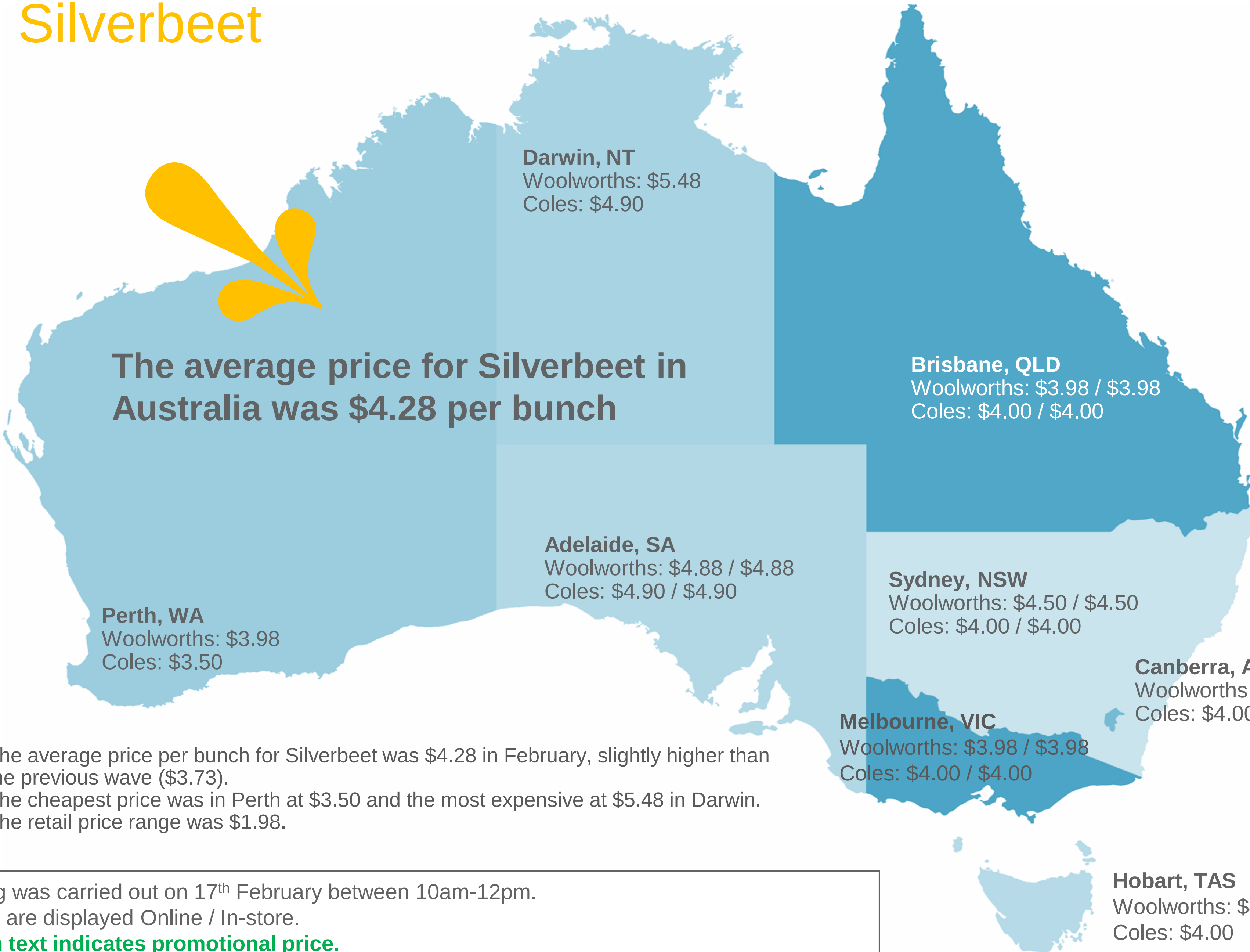
Nearly all consumers purchase silverbeet in bunched formats. This highlights the limited availability in other formats, including pre-packaged, which is currently purchased by a small number of consumers.



Q4b. In what fresh formats do you typically purchase Silverbeet?
Sample Wave 25 N=203, Wave 29 N=204, Wave 33 N=200

Online and In-store Commodity Prices

Silverbeet

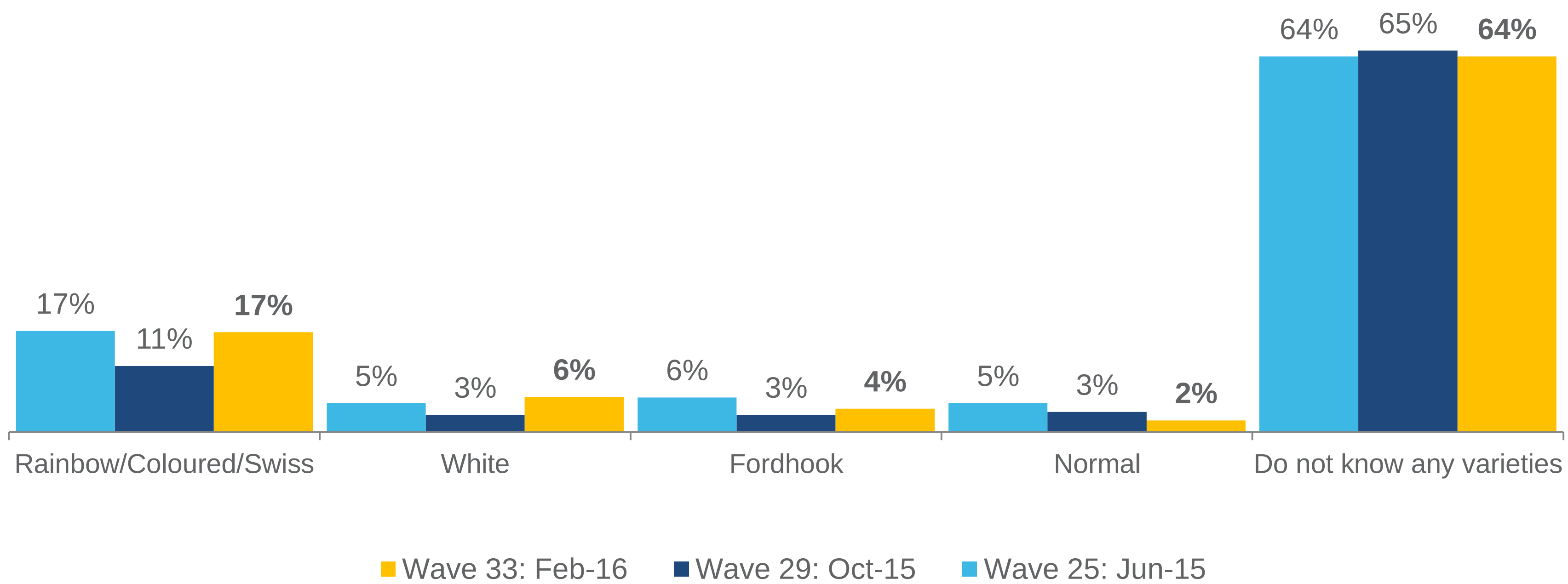


- The average price per bunch for Silverbeet was $4.28 in February, slightly higher than the previous wave ($3.73).
- The cheapest price was in Perth at $3.50 and the most expensive at $5.48 in Darwin.
- The retail price range was $1.98.

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

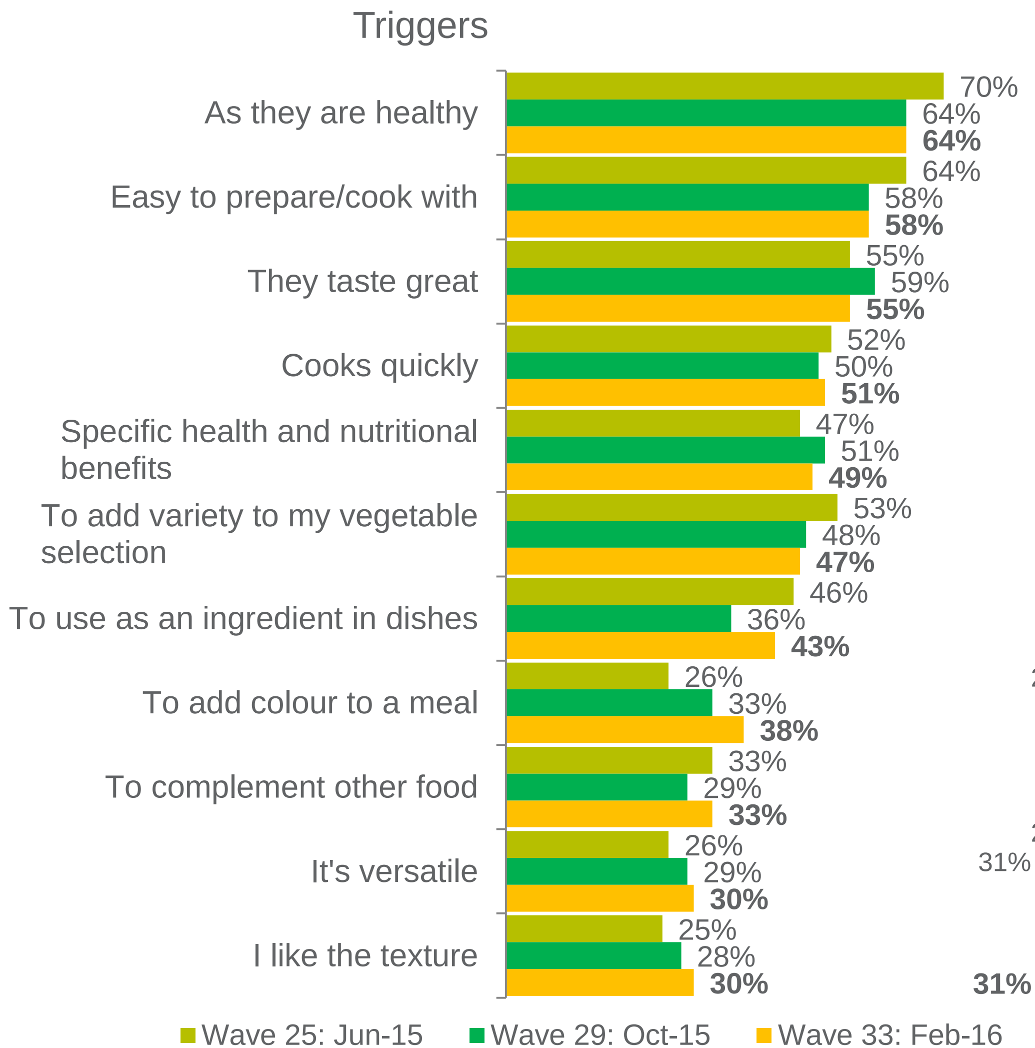
Spontaneous awareness for silverbeet is low, with the highest recall for rainbow/coloured/Swiss silverbeet.

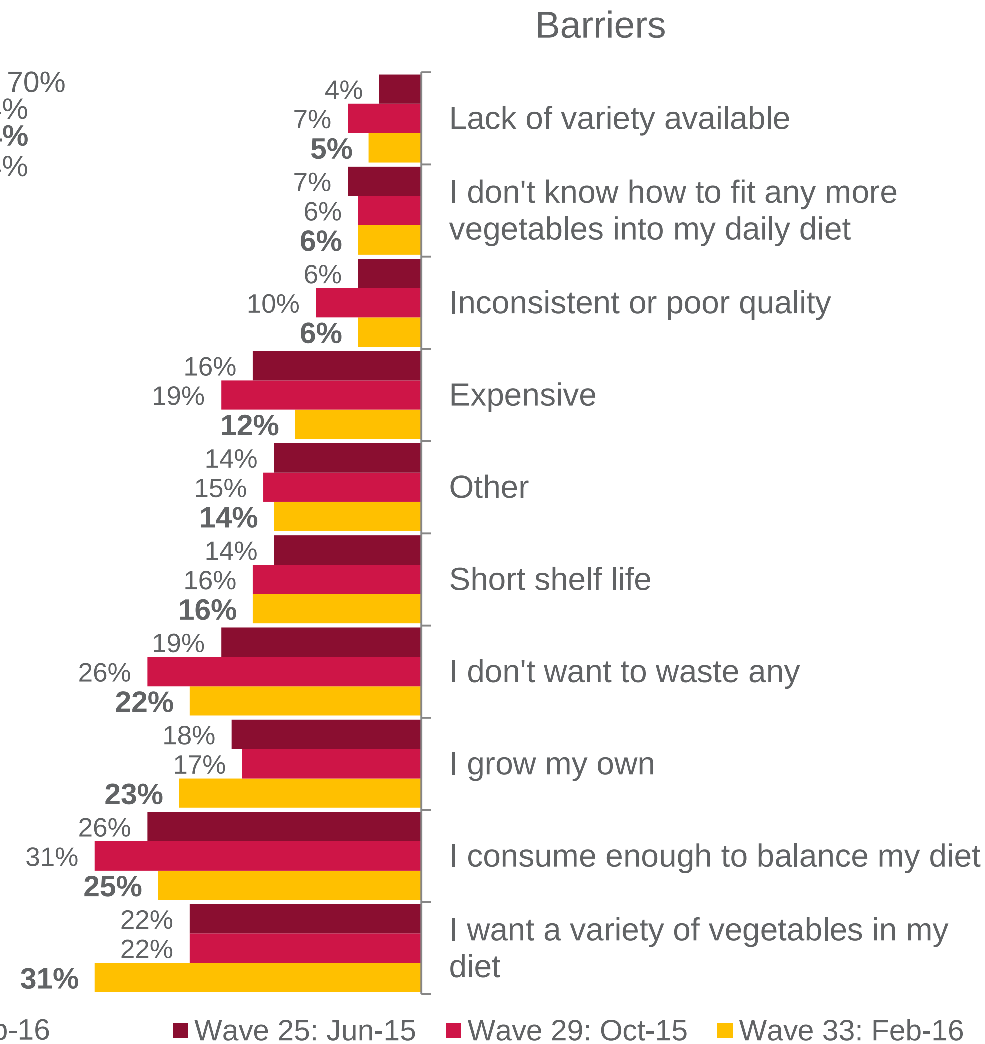
Spinach and Chard were also recalled by consumers as types of silverbeet.



Q6a. What varieties of Silverbeet are you aware of? (unprompted)
Sample Wave 25 N=203, Wave 29 N=204, Wave 33 N=200

The key drivers of purchase for silverbeet are health, ease of preparation and taste. In contrast, wanting a variety of vegetables, already consuming enough for their needs and growing their own are the main barriers to purchase.





Q7. Which of the following reasons best describes why you purchase Silverbeet ?
Q8. Which reason best describes why you don't buy Silverbeet more often?
Sample Wave 25 N=203, Wave 29 N=204, Wave 33 N=200

Silverbeet is popularly cooked in Australian and Chinese cuisine, consistent with past waves.

Meal occasions tend to occur during dinner and family meals. Nearly one fifth of consumers used silverbeet when cooking a new recipe.

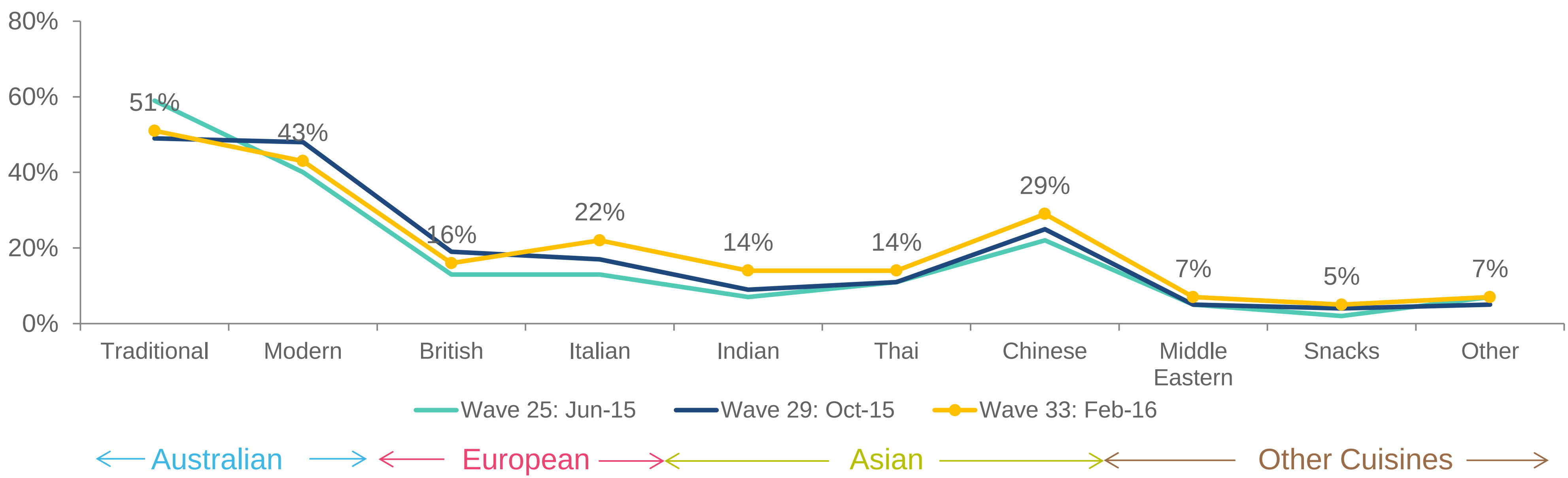
Top 5 Consumption Occasions

	Wave 29	Wave 33
Dinner	69%	**67%**
Family meals	58%	**62%**
Weekday meals	45%	**45%**
Quick meals	31%	**40%**
Weekend meals	33%	**34%**

17% used silverbeet when cooking a new recipe

▲ 12%, Wave 29

Typical Cuisine Cooked



Q10. What cuisines do you cook/consume that use Silverbeet?
Q11. Which of the following occasions do you typically consume/use Silverbeet?
Sample Wave 25 N=203, Wave 29 N=204, Wave 33 N=200

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

Consumers prefer to eat silverbeet mainly with potatoes and carrots, consistent with the previous waves. Silverbeet is generally steamed, cooked in stir- fries or boiled.

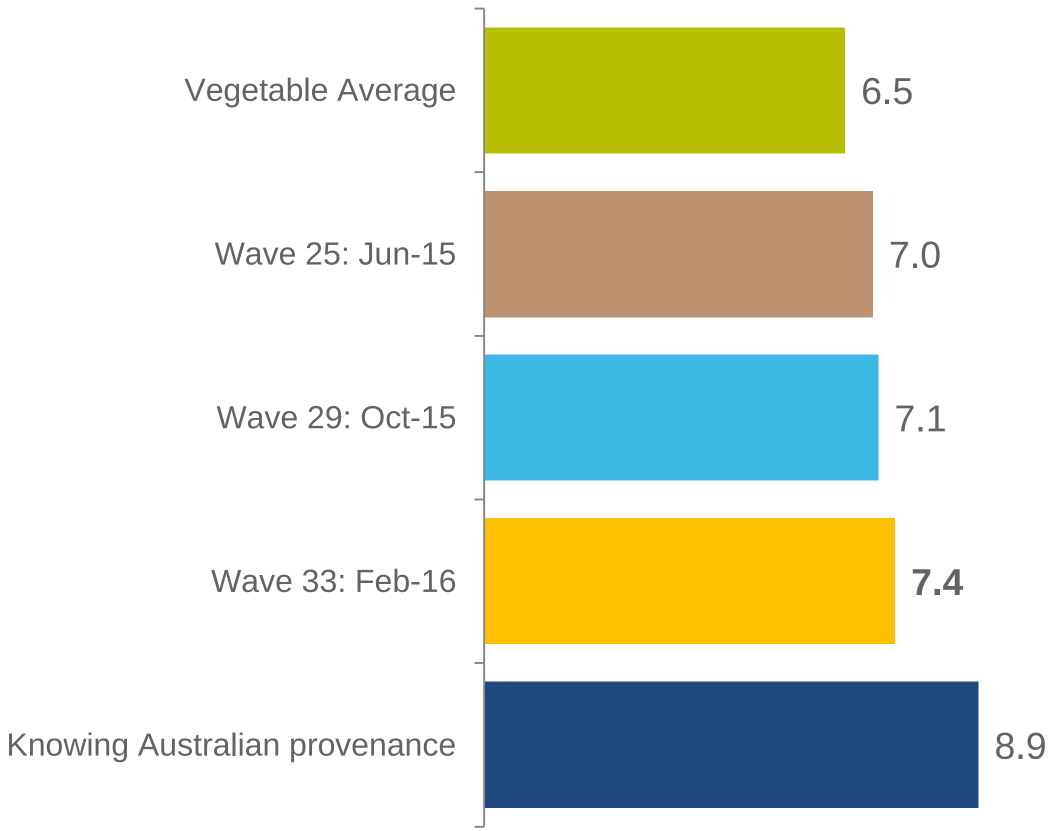
Accompanying Vegetables

Potato	59%
Carrot	54%
Pumpkin	34%
Sweet Potato	30%
Onion	30%

Top 10 Cooking Styles			
	Wave 25	Wave 29	Wave 33
Steaming	60%	54%	**59%**
Stir frying	34%	38%	**43%**
Boiling	39%	39%	**38%**
Soup	24%	16%	**24%**
Sautéing	21%	26%	**22%**
Baking	8%	5%	**13%**
Frying	9%	10%	**11%**
Slow Cooking	10%	7%	**10%**
Raw	6%	9%	**9%**
Microwave	11%	13%	**9%**

Q9. How do you typically cook Silverbeet?
Q10a. And when are you serving Silverbeet which of the following do you also serve together with this?
Sample Wave 25 N=203, Wave 29 N=204, Wave 33 N=200

Knowing that silverbeet is grown in Australia is most important to consumers, continuing to increase from the previous waves.



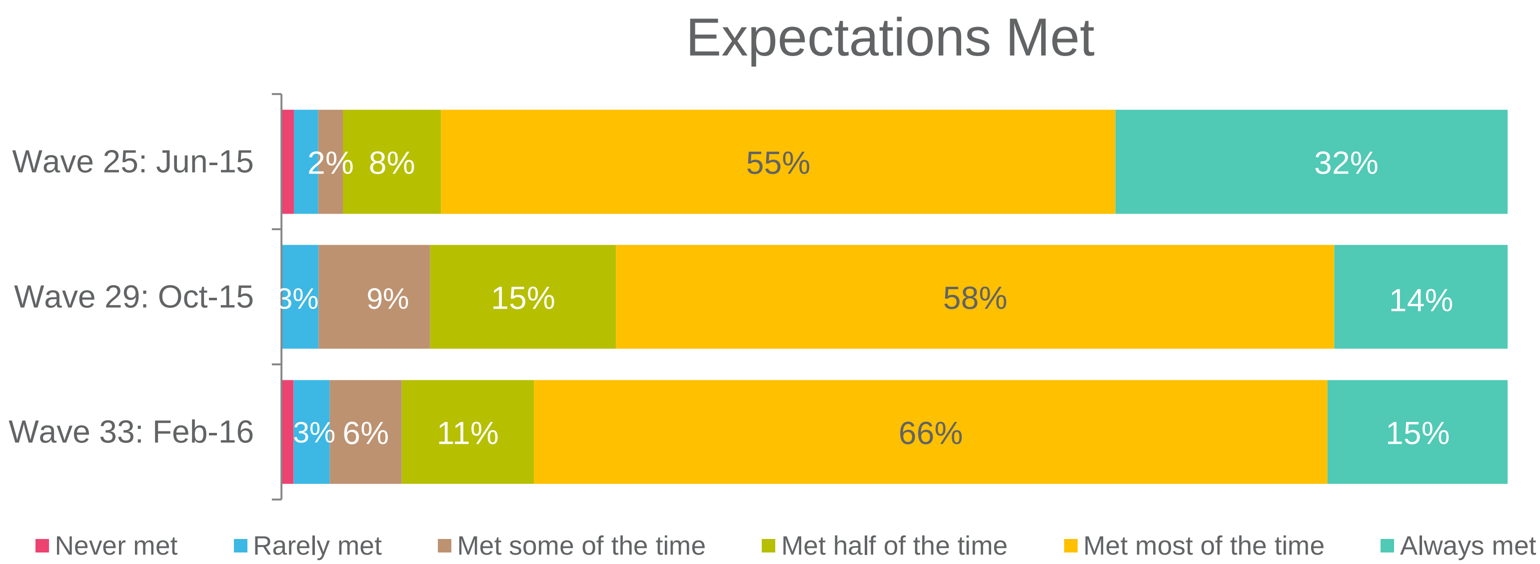
8.9

Q14. When purchasing Silverbeet, how important is Provenance to you?
Sample Wave 25 N=203, Wave 29 N=204, Wave 33 N=200

Freshness expectations for silverbeet have improved this wave, with the majority of freshness met most of the time.

Expected to stay fresh for **5.8** days

▲ 6.2 days, Wave 25
▲ 6.0 days, Wave 29



Q12. How long do you expect Silverbeet to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy Silverbeet?
Sample Wave 25 N=203, Wave 29 N=204, Wave 33 N=200

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

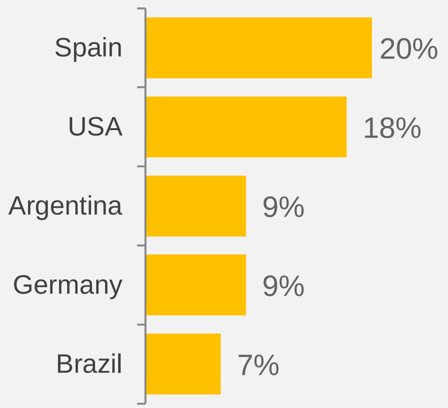
Silverbeet Product Launch Trends.

Silverbeet Global NPDs

December 2015 – February 2016

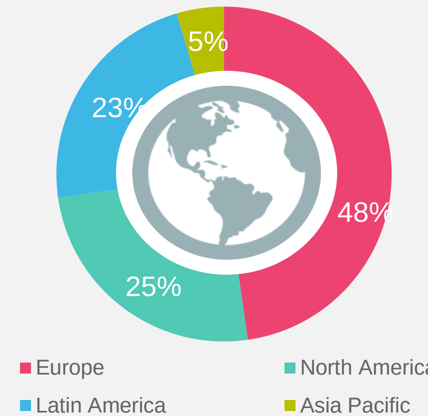
There were 44 products launched in the past three months that contained Silverbeet. Europe was the top region for launches, with Spain and USA being the key countries. Flexible packaging remained the most common format. Launches were predominately in the fruit and vegetables category.

Country

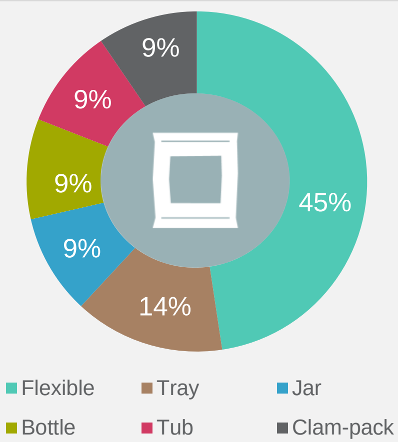


44 Global NPDs

Region



Top Pack Formats



Categories

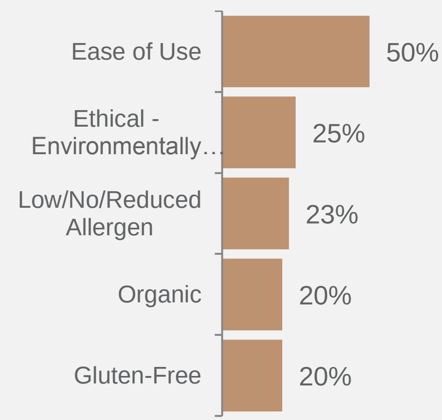
Fruit & Vegetables 48%

Meals 27%

Juice Drinks 9%

Processed Products 5%

Top Claims



Silverbeet Product Launches:
Last 3 Months (December 2015 – February 2016)
Summary

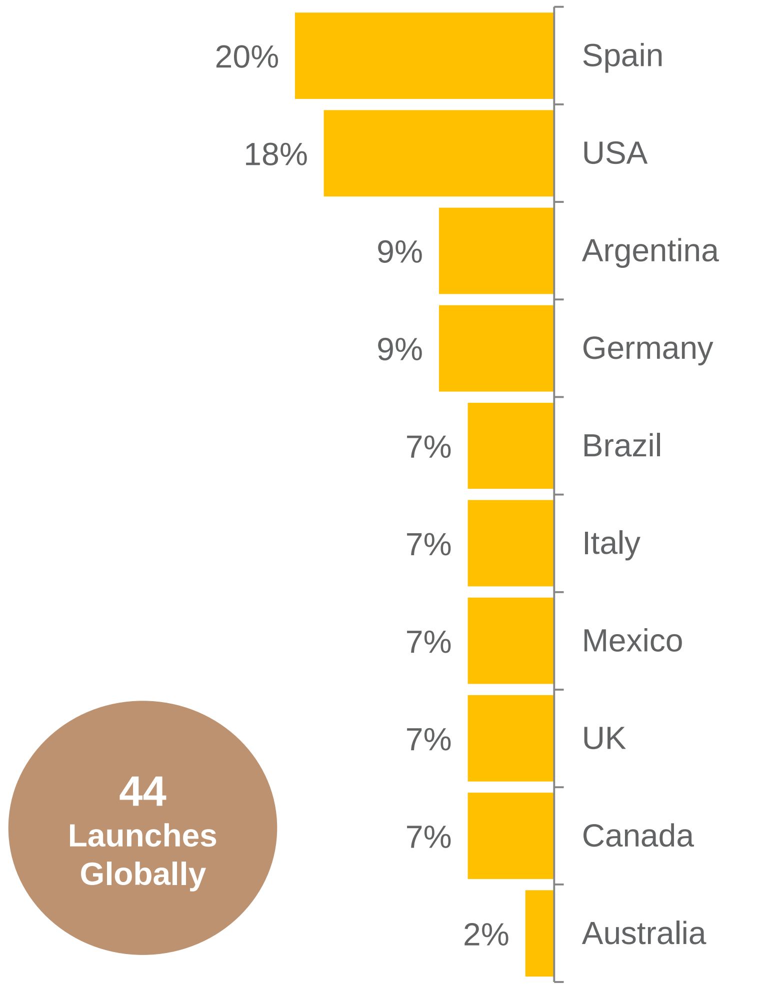
- A total of 44 products containing silverbeet as an ingredient were launched globally in the last 3 months.
- There were one silverbeet launch in Australia this quarter.
- Europe (48%) was the top region for launches. Key countries for innovation were Spain (20%), USA (18%), and Argentina (9%).
- Flexible packaging was the most widely used format for launches (45%), followed by tray formats (14%).
- Top categories for product launches were fruit and vegetables (48%), meals and meal centres (27%) and juice drinks (9%).
- Core claims for product launches globally included ease of use (50%), ethical – environmentally friendly packaging (25%), and low/no/reduced allergen (23%).
- The most innovative product was Nonna's Leafy Sauce – Tomato Sauce with Kale & Swiss Chard from the USA. Other examples of products can be found at the end of the silverbeet trend report.

Source: Mintel (2016)

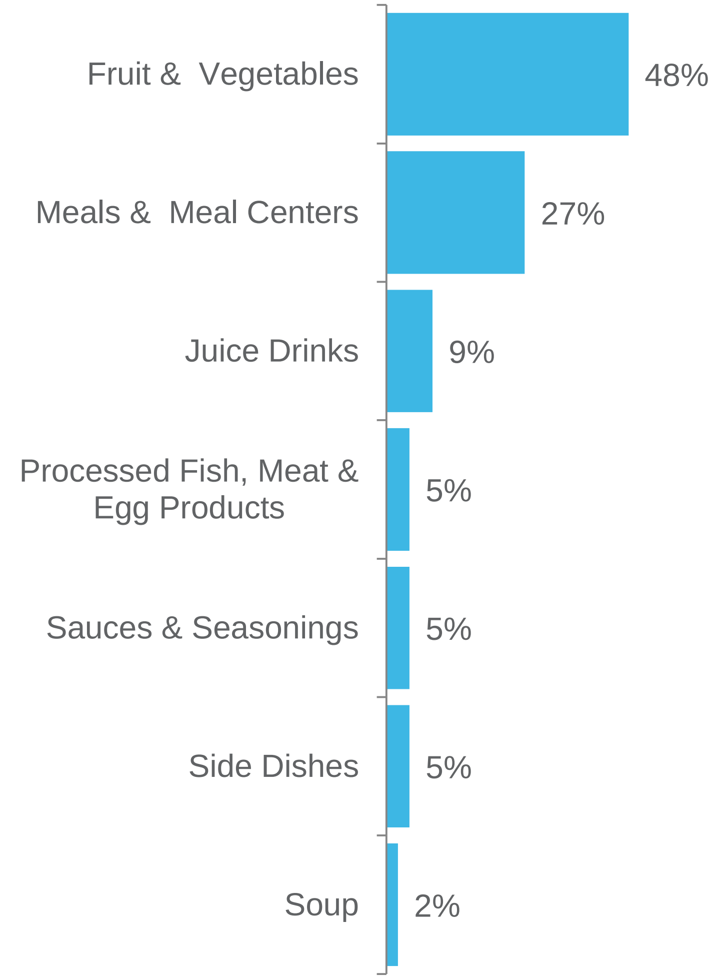
Silverbeet Launches
Country & Categories

- The most active country for launches in the last 3 months was Spain, followed by USA and Argentina.
- Fruit and vegetables are the key category for launches, with meals and juice drinks also common launches.

Top Launch Countries



Top Launch Categories



Horticulture Innovation Australia

colmar brunton.

Silverbeet Launches

Top Claims & Pack Formats Used

- The primary format of choice was flexible packaging, consistent with previous waves. Trays and jars were also popular formats.
- Ease of use was the key claim used globally. Ethical – environmentally friendly packaging and low/no/reduced allergen were also prominent.

Pack Formats Used

	Format	%
Global	Flexible	45%
	Tray	14%
	Jar	9%
	Bottle	9%
	Tub	9%

Top Claims Used

	Claim	%
Global	Ease of Use	50%
	Ethical - Environmentally Friendly Package	25%
	Low/No/Reduced Allergen	23%
	Organic	20%
	Gluten-Free	20%

Only regions with n >30 are displayed

Innovative Silverbeet Launches:
L3M (December 2015 – February 2016)

Marks & Spencer Salads Fruits & Vegetables Beetroot & Cherry Tomato Side (UK)

Marks & Spencer Salads Fruits & Vegetables Beetroot & Cherry Tomato Side has been relaunched with a new brand name, previously known as Marks & Spencer, a new recipe, and is now available with sprinkle and serve bowl. This product with a creamy lemon dressing is suitable for vegetarians, has 102 calories, and provides 2 of 5 a day. It retails in a new 185g partially recyclable pack, that serves one and bears the Eat Well logo.

Claims:

Vegetarian, Ethical - Environmentally Friendly Package

Alipende Chard (Spain)

Alipende Acelgas (Chard) is now available. The product has been cut, washed and drained, are ready to cook, and retails in a 300g pack containing three portions, featuring recipe a suggestion.

Claims:

Ease of Use

Nonna's Leafy Sauce Tomato Sauce with Kale & Swiss Chard (USA)

Nonna's Leafy Sauce Tomato Sauce with Kale & Swiss Chard is made with Jersey fresh tomatoes, handcrafted in small batches. The sauce can be mixed with pasta, cooked with seafood, veggies, simmered with strew or used as a topping for pizza and eggs. The product is free from dairy, GMO, additives and preservatives, and retails in a 24-oz. pack.

Claims:

No Additives/Preservatives, Low/No/Reduced Allergen, GMO-Free

Picard Mixed Green Vegetables in Cubes (Italy)

Picard Misto Verde a Cubetti (Mixed Green Vegetables in Cubes) is new to the range. This vegetables mix comprises selected and prepared spinach, chard and chicory leaves, quickly frozen after cut to preserve their freshness and nutritive value. The product cooks in just five minutes in the pressure cooker, in seven minutes in the pan and in eight minutes in the microwave. It is naturally rich in potassium, iron and vitamins A, B2, C and retails in a 450g pack with three portions.

Claims:

Microwaveable, Time/Speed

Source: Mintel (2016)

Innovative Silverbeet Launches:
L3M (December 2015 – February 2016)

Fausto Vegetable Pie (Argentina)

Fausto Tarta de Verdura (Vegetable Pie) has been repackaged and is now available in a newly designed pack. The product is made with selected ingredients and retails in a 270g pack.

Claims:

N/A

Consum Chard (Spain)

Consum Acelgas (Chard) is now available. This first category product from Spanish origin retails in a 660g pack.

Claims:

Ease of Use, GMO-Free, Low/No/Reduced Sugar

Eco Pelmeni Leyenda Rusa Fresh Pasta Filled with Chicken and Vegetables (Argentina)

Eco Pelmeni Leyenda Rusa Pasta Fresca Rellena con Pollo con Verdura(Fresh Pasta Filled with Chicken and Vegetables) is now available. The product retails in a 500g pack.

Claims:

N/A

Suja Über Greens Organic Drink (USA)

Suja Über Greens Organic Drink is now available. The fruit and vegetable juice comprises cucumber, celery, grapefruit, green chard, green leaf lettuce, lemon, kale, spinach, parsley and mint tea. The organic and cold pressured juice is free from gluten and GMO, and is made with locally sourced ingredients whenever possible. The vegan and kosher certified product retails in a 15.5-fl. oz. BPA-free pack bearing the USDA Organic logo.

Claims:

Kosher, Organic, Gluten-Free, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Product, Vegan, No Animal Ingredients, GMO-Free

Source: Mintel (2016)

Innovative Silverbeet Launches:
L3M (December 2015 – February 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

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

Pronto! Yakissoba Vegetables (Brazil)

Pronto! Legumes Yakissoba (Yakissoba Vegetables) are now available in a newly designed packaging . This sanitized product is gluten-free, and retails in a 400g pack.

Claims:

Gluten-Free, Low/No/Reduced Allergen

Alsácia Yakisoba (Brazil)

Alsácia Yakisoba has been added to the range. This microwaveable prepared meal contains no preservatives and retails in a recyclable 500g pack providing one individual portion.

Claims:

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

Source: Mintel (2016)

Parsley.

On average, parsley is purchased four times per month, and is consumed around ten times per month. Both have slightly increased this wave.

Parsley is generally purchased from mainstream retailers such as Coles and Woolworths. Markets and Aldi have noticeably increased this wave.

Average Purchase **3.9** times per month

3.9 times, Wave 25

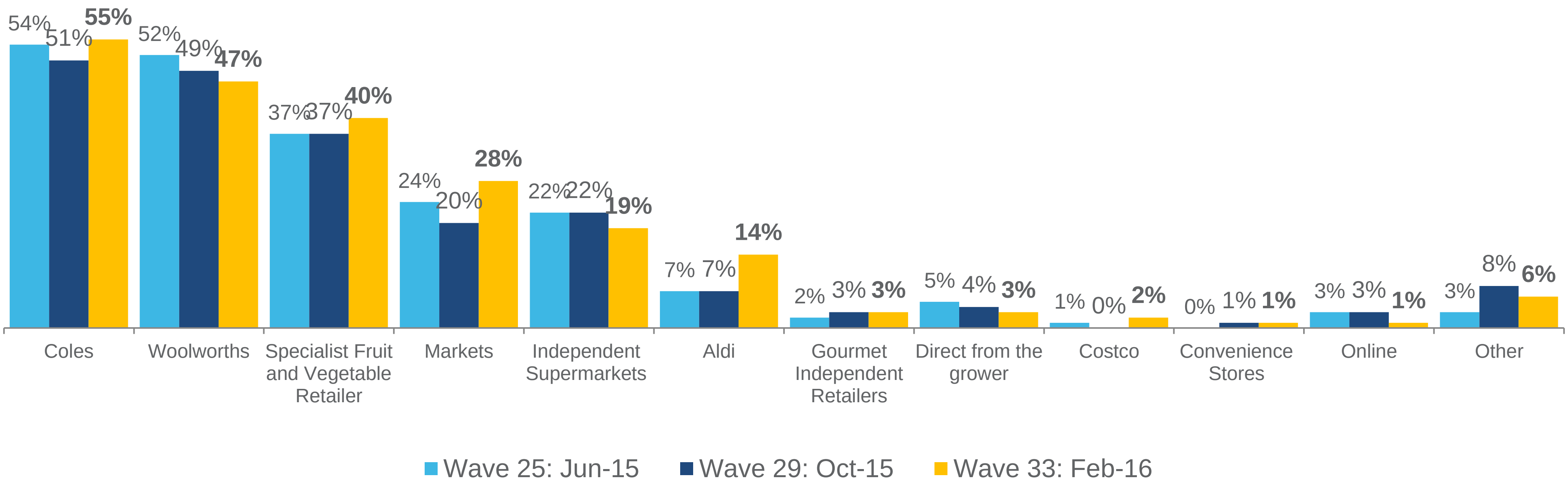
▼ 3.6 times, Wave 29

Average Consumption **10.8** times per month

▲ 11.4 times, Wave 25

▼ 10.4 times, Wave 29

Purchase Channels



Q1. On average, how often do you purchase parsley?
Q2. On average, how often do you consume parsley?
Q5. From which of the following channels do you typically purchase parsley?
Sample Wave 25 N=201, Wave 29 N=205, Wave 33 N=201

Horticulture Innovation Australia

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

Average Spend and Price Sensitivity

Average weight of purchase

The average consumer typically purchases **0.2kg** of parsley, which is consistent with the previous waves.

— 0.2kg, Wave 25

— 0.2kg, Wave 29

Recalled last spend

Recalled last spend on parsley is **$2.70**, which has slightly declined upon each wave.

▲ $3.10, Wave 25

▲ $2.80, Wave 29

Value for money

Consumers' perceived value for money is fair for parsley **(5.9/10)**, which is higher than previous waves.

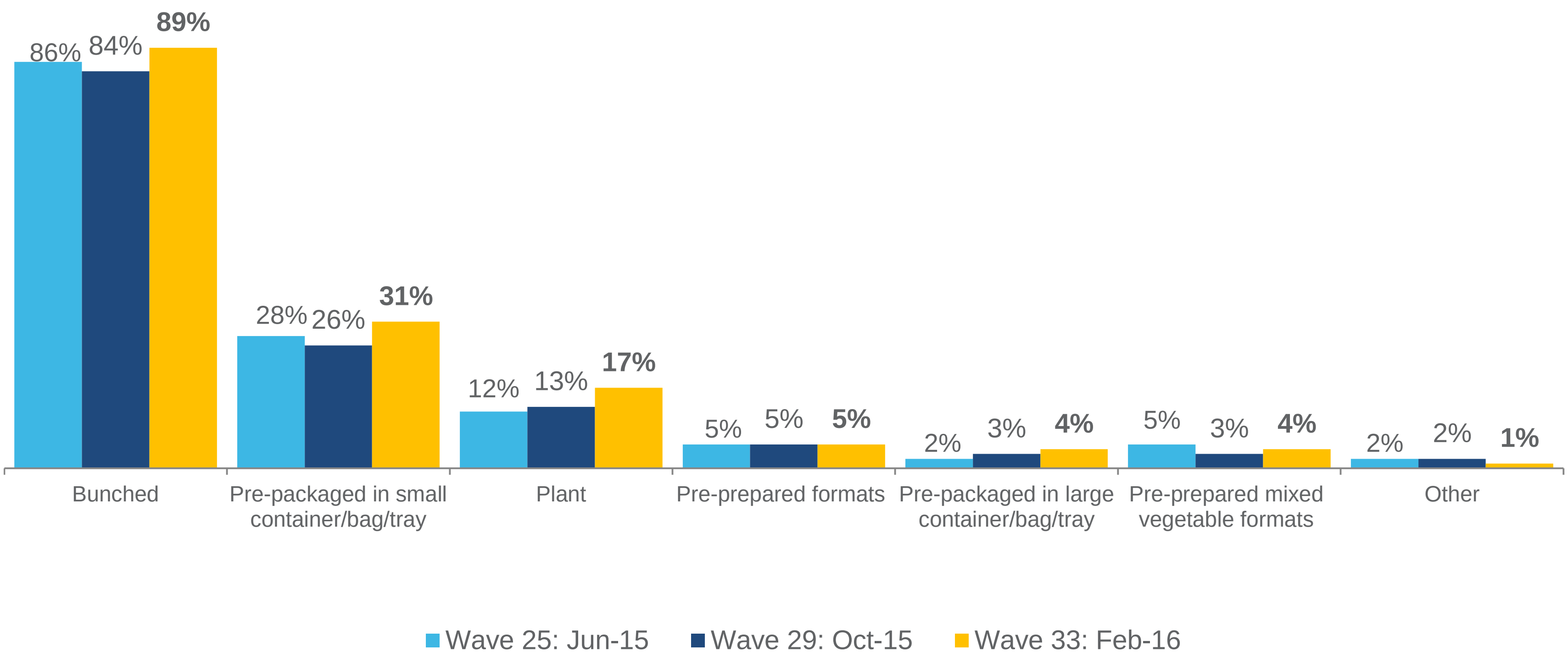
▼ 5.7/10, Wave 25

▼ 5.6/10, Wave 29

Q3. How much parsley 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 25 N=201, Wave 29 N=205, Wave 33 N=201

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

Bunched parsley remains the most common purchase format. Small bags and plants are other popular format options typically purchased by consumers.



Q4b. In what fresh formats do you typically purchase Parsley?
Sample Wave 25 N=201, Wave 29 N=205, Wave 33 N=201

Online and In-store Commodity Prices

Flat Leaf (Continental)

The average price for Parsley in Australia was $2.71 per bunch

Darwin, NT
Woolworths: $2.98
Coles: **2 for $5.00**

Brisbane, QLD
Woolworths: N/A / $2.98
Coles: **2 for $5.00** / **2 for $5.00**

Adelaide, SA
Woolworths: $2.78 / $2.78
Coles: **2 for $5.00** / **2 for $5.00**

Sydney, NSW
Woolworths: $2.98 / $2.98
Coles: **2 for $5.00** / **2 for $5.00**

Perth, WA
Woolworths: $2.98
Coles: **2 for $5.00**

Canberra, ACT
Woolworths: $2.98
Coles: **2 for $5.00**

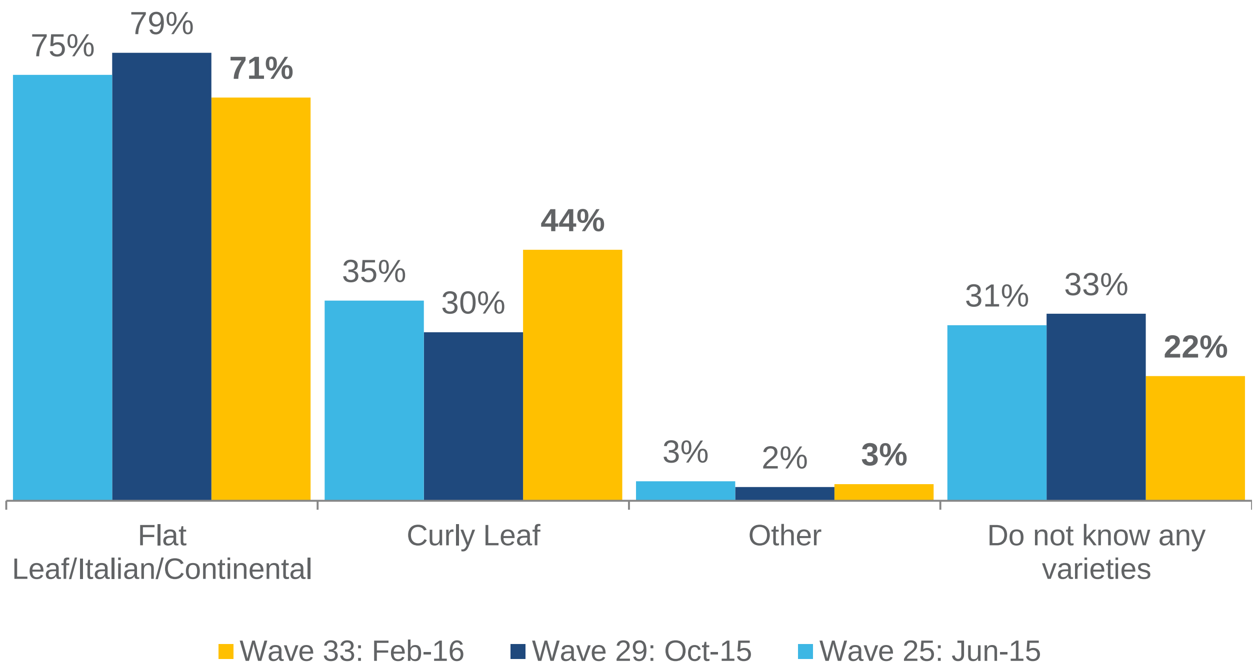
Melbourne, VIC
Woolworths: $2.98 / $2.98
Coles: **2 for $5.00** / **2 for $5.00**

Hobart, TAS
Woolworths: $2.98
Coles: **2 for $5.00**

- The average price per bunch for Parsley was $2.71 in February, which has remained stable with the previous wave.
- Coles has run a promotional campaign across all states with a 2 for $5.00 deal for all fresh herbs.
- The retail price range was $0.48.

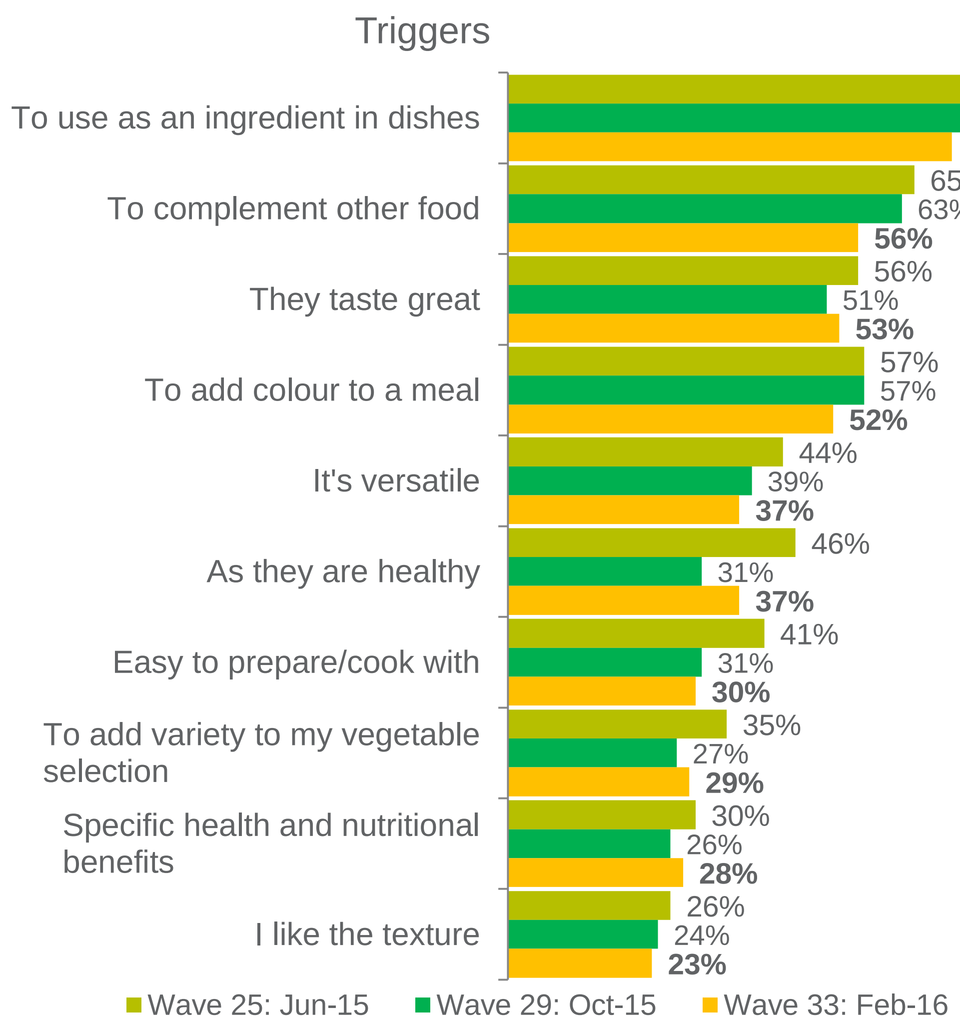
Pricing was carried out on 17th February between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates promotional price.

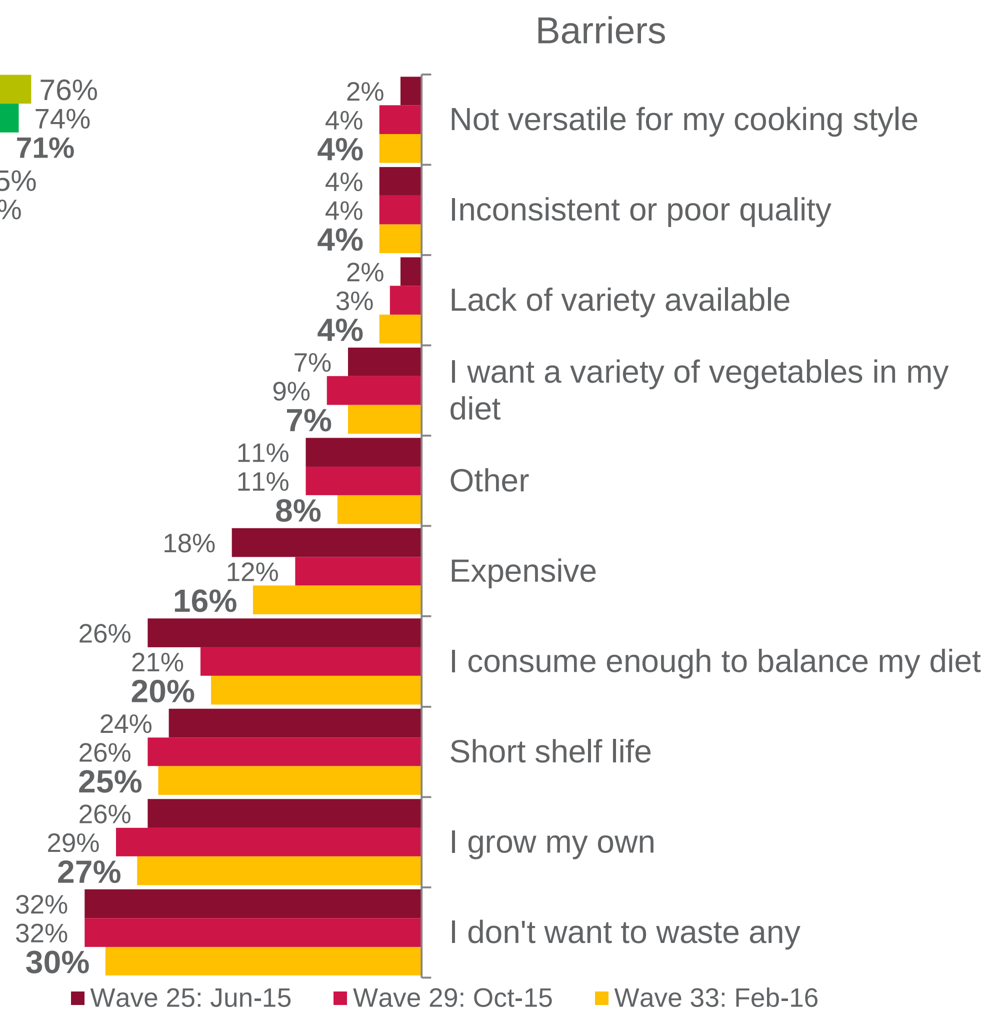
Awareness of parsley types is relatively high, with most consumers able to recall Flat Leaf/Italian/Continental parsley and Curly Leaf parsley, consistent with the previous wave.



Q6a. What varieties of parsley are you aware of? (unprompted)
Sample Wave 25 N=201, Wave 29 N=205, Wave 33 N=201

Using parsley as an ingredient in dishes, complementing other foods and taste are the key drivers of purchase. In contrast, the key barriers to purchase are not wanting to waste any and growing their own parsley, which is consistent with the previous waves.





Q7. Which of the following reasons best describes why you purchase parsley?
Q8. Which reason best describes why you don't buy parsley more often?
Sample Wave 25 N=201, Wave 29 N=205, Wave 33 N=201

Italian and Australian cuisines are popular for parsley dishes.

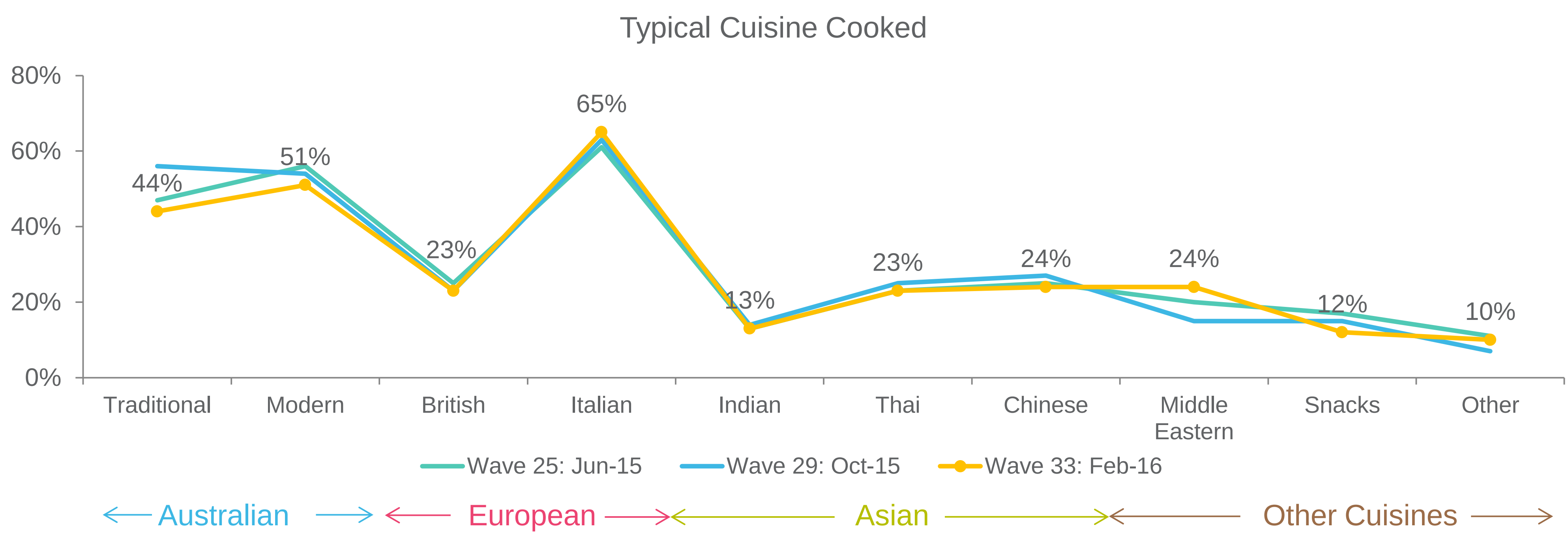
Consumption tends to occur during dinner and family meals, consistent with the past wave.

Top 5 Consumption Occasions

	Wave 29	Wave 33
Dinner	77%	**68%**
Family Meals	68%	**59%**
Weekday Meals	54%	**53%**
Quick Meals	50%	**52%**
Weekend Meals	52%	**46%**

34% used parsley when cooking a new recipe

▲ 37%, Wave 29



Q10. What cuisines do you cook/consume that use parsley?
Q11. Which of the following occasions do you typically consume/use parsley?
Sample Wave 25 N=201, Wave 29 N=205, Wave 33 N=201

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

Consumers prefer to use parsley with tomatoes and potatoes, consistent with the previous wave. Parsley is generally consumed raw but also popular cooked in soups and stir fries.

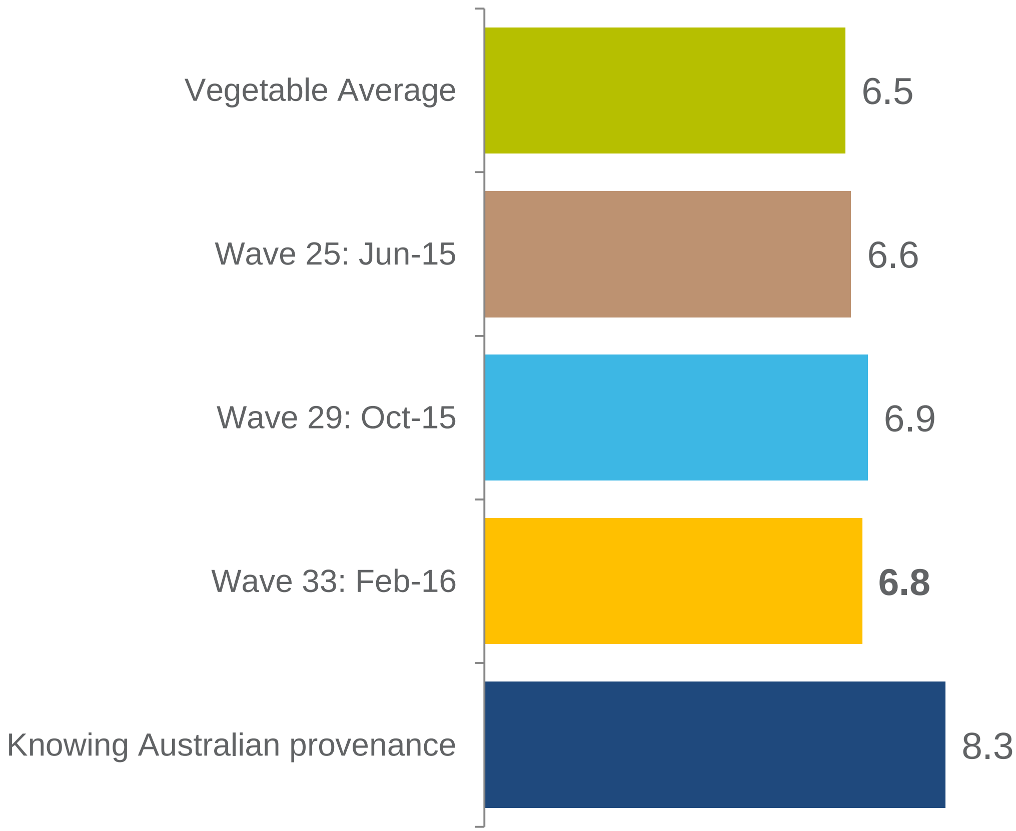
Accompanying Vegetables

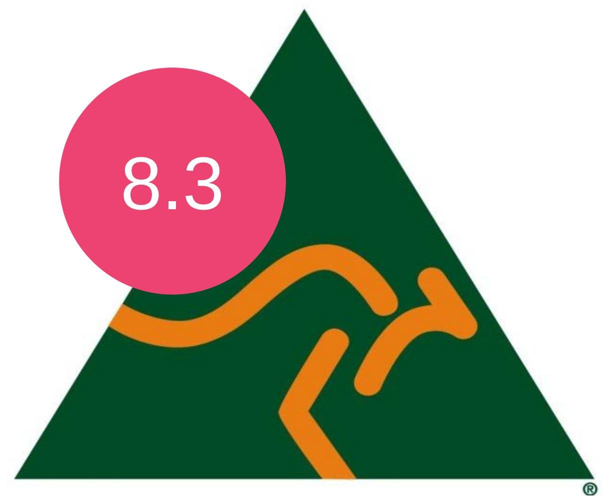
Tomato	59%
Potato	57%
Carrot	46%
Onion	43%
Garlic	34%

Top 10 Cooking Styles			
	Wave 25	Wave 29	Wave 33
Raw	63%	67%	**66%**
Soup	52%	37%	**46%**
Stir frying	40%	48%	**37%**
Slow Cooking	26%	26%	**25%**
Sautéing	20%	21%	**24%**
Baking	20%	20%	**16%**
Roasting	13%	9%	**14%**
Frying	17%	16%	**14%**
Steaming	14%	9%	**14%**
Mashing	15%	17%	**13%**

Q9. How do you typically cook parsley?
Q10a. And when are you serving parsley which of the following do you also serve together with this?
Sample Wave 25 N=201, Wave 29 N=205, Wave 33 N=201

Knowing that parsley is grown in Australia is the most important provenance information for consumers. Both general provenance and Australian provenance slightly declined from the last wave.



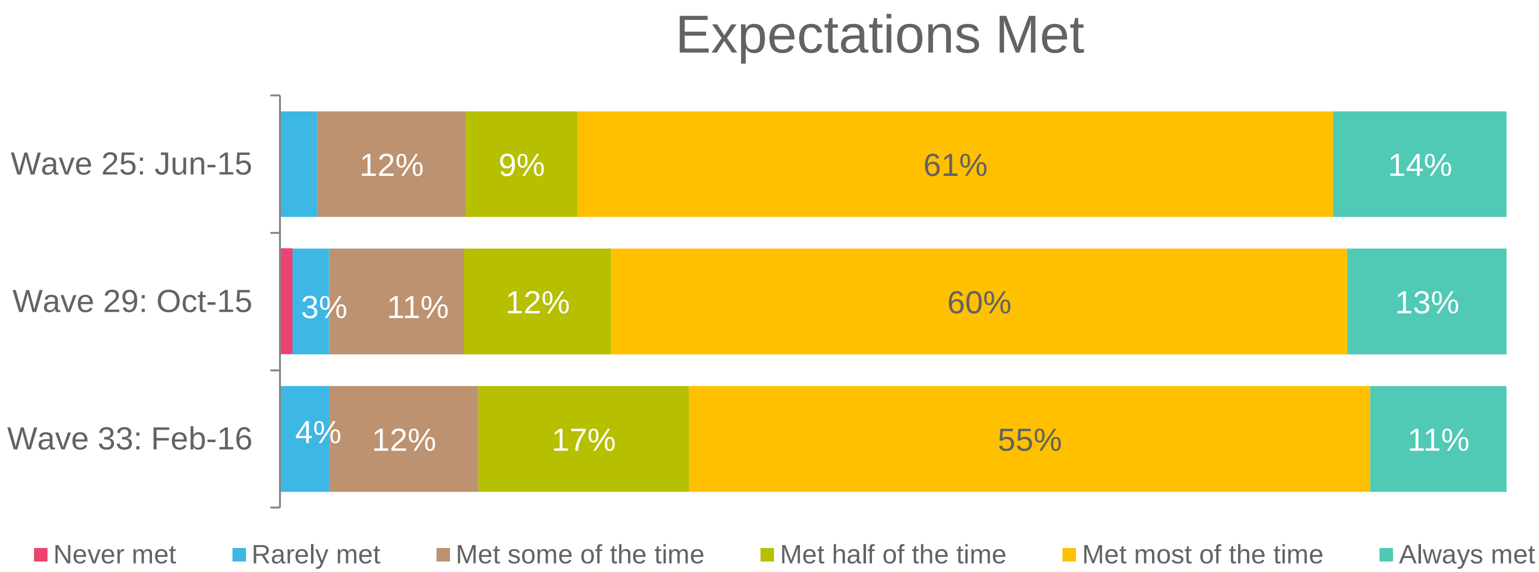


Q14. When purchasing parsley, how important is Provenance to you?
Sample Wave 25 N=201, Wave 29 N=205, Wave 33 N=201

Consumers expect parsley to remain fresh for just over a week once purchased. Expectations of the length of freshness has declined over the last three waves.

Expected to stay fresh for **7.4** days

▲ 7.7 days, Wave 25
▬ 7.4 days, Wave 29



Q12. How long do you expect parsley to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy parsley?
Sample Wave 25 N=201, Wave 29 N=205, Wave 33 N=201

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

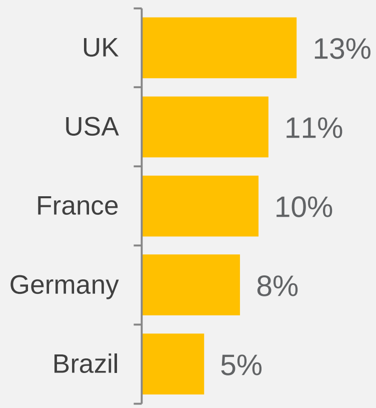
Parsley Product Launch Trends.

Parsley Global NPDs

December 2015 – February 2016

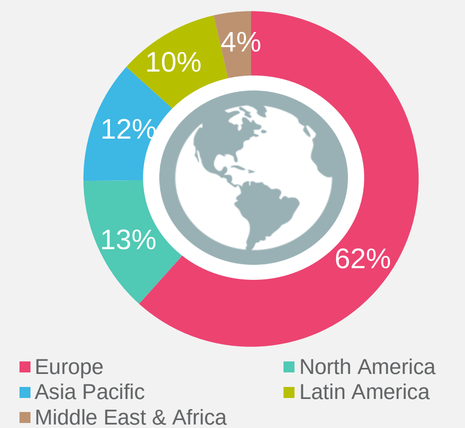
There were 2125 products launched in the past three months that contained Parsley, substantially higher than the previous wave (1684 launches). Europe and North America were the key regions for launches, with UK and USA being the main countries. Flexible packaging remained the most common format. Launches were predominately in the meals or sauces and seasonings categories.

Country

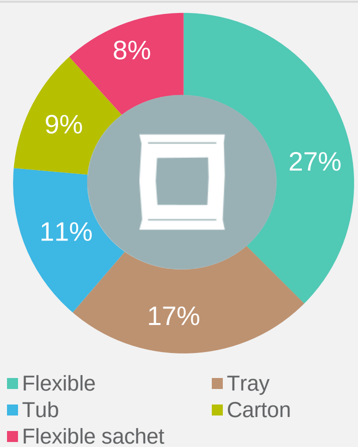


2125 Global NPDs

Region



Top Pack Formats



Categories

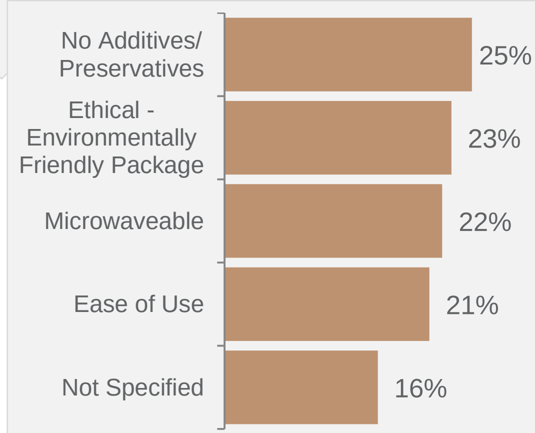
Meals 23%

Sauces & Seasonings 20%

Snacks 14%

Processed Products 13%

Top Claims



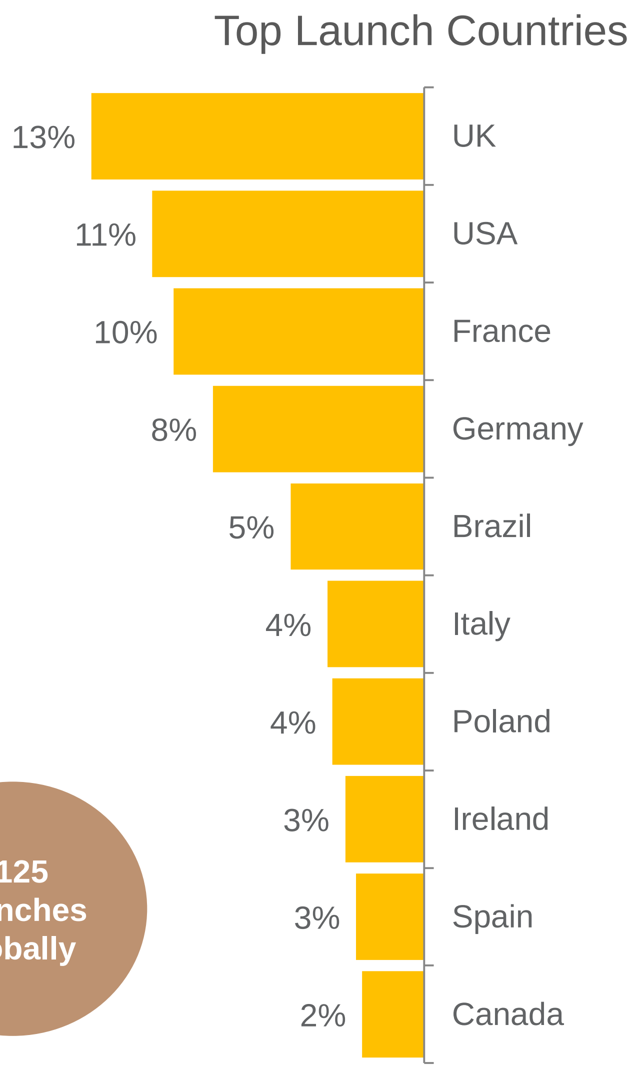
Parsley Product Launches:
Last 3 Months (December 2015 – February 2016)
Summary

- A total of 2125 products containing parsley as an ingredient were launched globally in the last 3 months, substantially higher than the previous quarter (1684).
- There were 46 parsley launches in Australia this quarter.
- Europe (62%) was clearly the top region for launches. Key countries for innovation were UK (13%), USA (11%), and France (10%).
- Flexible packaging was the widely used format for launches (27%), followed by tray formats (17%).
- Top categories for product launches were meals and meal centres (23%), sauces and seasonings (20%), snacks (14%), and processed products (13%).
- Core claims for product launches globally included no additives/preservatives (25%), ethical – environmentally friendly package (23%), microwaveable (22%), and ease of use (21%) .
- The most innovative product was Gourmet Compagnie Bread Dumplings, launched in Germany. Other examples of products can be found at the end of the parsley trend report.

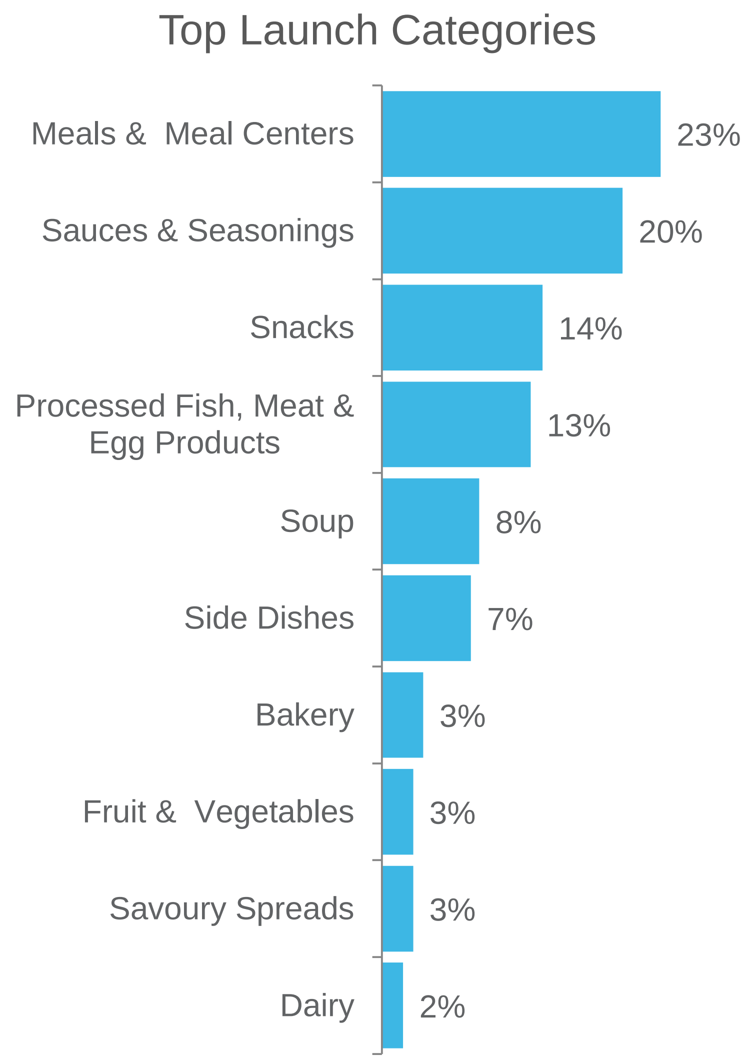
Source: Mintel (2016)

Parsley Launches
Country & Categories

- The most active country for launches in the last 3 months was the UK, followed by USA and France.
- Meals and sauces and seasonings are the key categories for launches, followed by snacks and processed products.



2125 Launches Globally



Parsley Launches
Top Claims & Pack Formats Used

- Pack formats were relatively consistent across regions, with the primary format of choice being flexible packaging.
- No additives and preservatives was the key claim used globally, with environmentally friendly packaging and microwaveable also popularly utilised claims.

Pack Formats Used

Global	Flexible	27%
Global	Tray	17%
Global	Tub	11%
Europe	Flexible	25%
Europe	Tray	23%
Europe	Tub	13%
North America	Flexible	33%
North America	Tray	14%
North America	Flexible sachet	13%

Top Claims Used

Global	No Additives/Preservatives	25%
Global	Ethical - Environmentally Friendly Package	23%
Global	Microwaveable	22%
Europe	Ethical - Environmentally Friendly Package	26%
Europe	No Additives/Preservatives	24%
Europe	Microwaveable	22%
North America	Microwaveable	35%
North America	Ease of Use	29%
North America	No Additives/Preservatives	28%

Innovative Parsley Launches:
L3M (December 2015 – February 2016)

Maggi Jugoso al Horno Seasoning for Roasted Chicken with Garlic and a Touch of Parsley (Spain)

Maggi Jugoso al Horno Condimento Sazonador Deshidratado para Preparar Pollo Asado Ajillo al Toque de Perejil (Seasoning for Roasted Chicken with Garlic and a Touch of Parsley) now features a touch of parsley and comes in a new pack. The product allows to bake without the addition of oil, is said to help prepare a delicious dish in an easy and practical way, without making a mess.

Claims:
Ease of Use

Schneiders Ham & Cheese Stuffed Chicken (Canada)

Schneiders Ham & Cheese Stuffed Chicken has been repackaged with a new look. It is described as breaded, uncooked white meat chicken cutlettes filled with cheese and smoked ham. The product retails in a 1.14kg pack.

Claims:
N/A

Amphora Greek Traditional Moussaka (China)

Amphora Xi La Mu Sa Ka (Greek Traditional Moussaka) is described as a layers of eggplant, potatoes and beef cubes seasoned with béchamel sauce. This microwaveable product is made using 100% Australian beef, and retails in a 540g pack providing two servings.

Claims:
Microwaveable

Enjoy Life Plentils Crunchy Lentil Chips with Dill & Sour Cream (USA)

Enjoy Life Plentils Crunchy Lentil Chips with Dill & Sour Cream have been repackaged with an updated design. They contain lentils that are one of the best sources of plant based protein with their all-natural goodness. This protein packed snack features a crunchy texture and is bursting with flavor.

Claims:
All Natural Product, Low/No/Reduced Cholesterol, Kosher, Low/No/Reduced Fat, Gluten-Free, Low/No/Reduced Transfat, Low/No/Reduced Allergen, Vegan, High Protein, No Animal Ingredients, GMO-Free, Low/No/Reduced Saturated Fat, Social Media

Source: Mintel (2016)

Innovative Parsley Launches:
L3M (December 2015 – February 2016)

Ruffles Pra Nós Onion & Parsley Wavy Potato Chips (Brazil)

Ruffles Pra Nós Batatas Fritas Onduladas Cebola e Salsa (Onion & Parsley Wavy Potato Chips) have been repackaged in a limited edition. These chips have been made in partnership with potato producers and following a scheme that allows increased productivity while using less natural resources. The gluten-free product contains nature identical artificial flavor, and retails in a 110g recyclable pack, including 10% for free.

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

Taifun Black Forest Tofu (Germany)

Taifun Black Forest Tofu is described as a smoked speciality with a peculiar spicy note. This organic product retails in a 200g pack, featuring the Vegan Society and EU Green Leaf logos.

Claims:
Organic, Vegan, No Animal Ingredients

Antersdorfer Mühle Bio Buckwheat Patties with Vegetables (Germany)

Antersdorfer Mühle Bio Buckweizen Bratlinge mit Gemüse (Buckwheat Burgers with Vegetables) cook in eight to ten minutes and are a tasteful and versatile option for every occasion. The vegan product retails in a 315g pack containing 12 units and featuring the V-Label seal from the European Vegetarian Union and EU Leaf logos. This product was on display at Biofach 2016 in Nuremberg, Germany.

Claims:
Organic, Vegetarian, Vegan, No Animal Ingredients

Charlie Bigham's Meatballs Al Forno (UK)

Charlie Bigham's Meatballs Al Forno have been repackaged for Valentine's Day 2016. The product comprises fresh pork meatballs and trulli pasta in tomato sauce, topped off with mozzarella. It is said to be delicious with garlic bread and a mixed salad. This meatball product serves two, oven cooked in 30 minutes and retails in a 650g pack featuring the Facebook, Instagram and Twitter logos.

Claims:
Seasonal, Social Media

Source: Mintel (2016)

Innovative Parsley Launches:
L3M (December 2015 – February 2016)

CleverFoodies Scramble Mediterranean Veggies & Herbs (Canada)

CleverFoodies Scramble Mediterranean Veggies & Herbs comprises yellow and red pepper, kalamata olives, basil, tomatoes and capers. It requires only the addition of eggs for omelets, scrambled eggs, and frittatas. The product is suitable for vegetarians, gluten-free and free from GMO's, and retails in a 312g BPA-free pack which is freezer, microwave and dishwasher safe.

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

Lay's Bolognese Flavoured Potato Crisps (Morocco)

Lay's Chips de Pomme de Terre Saveur Bolognaise (Bolognese Flavoured Potato Crisps) are now available. The product is free of artificial colours and preservatives, and retails in a 100g pack.

Claims:
No Additives/Preservatives

Gourmet Compagnie Bread Dumplings (Germany)

Gourmet Compagnie Semmel Knödel (Bread Dumplings) are now available. They are prepared with freshly baked bread cubes, parsley and 97% regional ingredients, and are said to taste like they are home made. The product retails in a 360g pack.

Claims:
N/A

Organics Happy Baby Hearty Meals Harvest Vegetables & Chicken with Quinoa (Hong Kong)

Organics Happy Baby Hearty Meals Harvest Vegetables & Chicken with Quinoa is an effortless organic baby food designed for babies from seven months onwards. The stage three product is designed by real mums, paediatricians and nutritionists, and described as a wholesome blend of protein, veggies and grains that provides 4g of protein, and 25% of the daily value of vitamin A.

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

Source: Mintel (2016)

Top Australian Parsley Launches:
L3M (December 2015 – February 2016)

Nando's Lemon & Herb Mild Peri-Peri Rub

McKenzie's Cornish Sea Salt Co. Lemon & Thyme Sea Salt

Picasso Kitchen Heat & Share Semi-Dried Tomato & Mozzarella Bread

Chobani Mezé Dip Herbed Tzatziki Dip

Freedom Farms Portuguese Butterflied Chicken

Breath Pearls Original Peppermint & Parsley Soft Gels

Outback Spirit Provenance Wild Herb Salt

Woolworths Created with Jamie Jamie's Favourite Slaw

Source: Mintel (2016)

In the Media.

General Vegetable News
(December 2015 – February 2016)

- The Tassievore challenge, running throughout March, encourages Tasmanians to eat and drink produce grown and made in their state.
- Sustainable Living Tasmania started the challenge in 2012 inspired by the locavore movement (someone who eats food sourced within 160 kilometres of where they live).
- Kym Blechynden, a nutritionist and lecturer at the University of Tasmania stated that “we want people to be able to make small changes that are long-lasting changes and really enjoy the food and the Tasmanian products we have available.”
- The challenge runs for one month and has four themes – grow your own; ask for local produce; share produce and meals; and long-term change to food supply to make it more sustainable.

Source: www.abc.net.au

Commodity News

(December 2015 – February 2016)

- A new type of pumpkin with a flavour of chestnuts has been developed in Taiwan.
- The Kaohsiung District Agricultural Research and Extension Station announced that the new type of pumpkin has the potential for export.
- The new strain, which has a flattened round shape, is easy to cultivate, and is suitable for growing in the spring and autumn in Taiwan. It can also be chopped into chunks and frozen to export to potential markets such as Japan.

http://www.taiwannews.com.tw/

- Carrot Cake Hershey Kisses will be available in the US for the Easter season.
- Hershey's latest holiday treats are made with a white-chocolate base and an orange coating that is "naturally and artificially flavoured".
- The candies will be sold exclusively at Walmart with a nine-ounce bag (255 grams).

http://time.com/

- A sinking dollar, high demand and bad weather have sent cauliflower prices soaring in Canada.
- Canadians have reported prices higher than $8.00 CAD per head, making headlines across the country and sparking what many have called Canada's first "cauliflower crisis".
- Poor weather conditions had disrupted supply, ending the California growing season early. Coupled with increased demand amid food trends that replace carbs for cauliflower, prices were nearly double what they were a year earlier.

http://www.cnbc.com/

- Troy Walker got the shock of her life when she discovered that her can of pre-cooked green beans contained a snake head inside.
- The maker of the green beans, Western Family has since pulled all green bean cans off the shelves from the store in Farmington, Utah and others in the surrounding area.

https://au.lifestyle.yahoo.com

Commodity News
(December 2015 – February 2016)

- American fast food restaurant chain Chick-fil-A has introduced a “Superfood Side” salad as an item on their permanent menu.
- The “superfood side” features kale, Broccolini, dried sour cherries, and roasted nuts tossed in a maple vinaigrette dressing.
- This will replace Chick-fil-A’s signature coleslaw as part of a move to add “variety” to its menu.

http://www.businessinsider.com.au/

- Recent retailer reports in the UK have shown an uplift in sales of bitter-tasting vegetables such as silverbeet, kale and chicory.
- This sales increase is predominantly driven by growing interest in health, and in particular using vegetables as ingredients in home-made smoothies.
- Waitrose’s category varietal development manager, David Northcroft stated that the recent introduction of new products including speciality kales and sweet-sprouting cauliflower has created renewed interest among consumers.

http://www.fruitnet.com/

- Cookware company, Lékué has developed the ‘Herbstick’, a product used to minimise wastage of various herbs.
- Users will only have to chop a large handful of fresh herbs, load them into the green tube, cover with olive oil, and put the tube in the freezer.
- Any time when required in a dish, the stick is to be taken out of the freezer to let sit for a few minutes, and either sliced into a chunk or grated into shreds.
- The product retails for US$9.99.

https://www.bostonglobe.com/

Background & Methodology.

Background & Setting the Scene.

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

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

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

This wave's report (Wave 33, February 2016) focuses on:

- Pumpkin
- Carrot
- Cauliflower
- Beans
- Baby Broccoli
- Silverbeet
- Parsley

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

Horticulture Innovation Australia

colmar brunton.

Online Methodology.

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

General Respondent Questions

- Demographics
- Vegetable Consumption

1/7 Commodities

Commodity Specific Questions

- Category Health
- Purchase & Consumption Habits
- Price Perceptions & Average Spend
- Triggers/Barriers to Purchase
- Preparation Preferences

+ 2 Ad hoc Questions per Month

Sample.

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

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

To qualify for the questionnaire, respondents...

- Were aged 18 years and over
- Purchased fresh vegetables at least once a month
- Purchased at least one of the monthly commodities (pumpkin, carrot, cauliflower, beans, baby broccoli, silverbeet, parsley) within the last month
- Were the main or joint grocery buyer

	Beans n=301	Carrot n=302	Cauliflower n=301	Pumpkin n=304	Baby Broccoli n=201	Silverbeet n=200	Parsley n=201
Gender							
Male	34%	31%	34%	33%	40%	34%	31%
Female	66%	69%	66%	67%	60%	67%	69%
Age							
18-24 y.o.	8%	10%	8%	4%	2%	1%	2%
25-34 y.o.	18%	17%	16%	19%	14%	10%	14%
35-44 y.o.	16%	18%	18%	19%	11%	9%	19%
45-54 y.o.	21%	17%	18%	20%	19%	24%	16%
55-64 y.o.	20%	23%	22%	19%	34%	33%	33%
65+ y.o.	17%	17%	19%	18%	19%	24%	16%
Household							
Single Income no Kids	19%	17%	16%	12%	19%	16%	16%
Double Income no Kids	21%	19%	18%	19%	19%	18%	21%
Young Families	15%	15%	18%	16%	13%	9%	16%
Established Families	26%	24%	24%	25%	19%	26%	25%
Empty Nesters	19%	25%	25%	27%	29%	32%	21%
Location							
New South Wales	15%	16%	16%	20%	14%	23%	19%
Victoria	22%	20%	21%	20%	15%	21%	27%
South Australia	17%	18%	17%	14%	23%	12%	13%
Queensland	20%	19%	20%	22%	16%	19%	15%
Western Australia	18%	18%	18%	17%	20%	14%	15%
Tasmania	5%	7%	7%	7%	6%	7%	3%
Australian Capital Territory	2%	2%	1%	1%	2%	4%	6%
Northern Territory	1%	1%	1%	1%	1%	1%	0%

Trends Research: Our Approach

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

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

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

Country

Top countries where products were launched.

Region

What regions new products were launched in.

Commodity

Number of Launches L3M

Top Pack Formats

Top pack formats used for products.

Top Categories

Top categories that products were launched in.

Top Claims

Top claims made by products that were launched.

Thanks.