Project Harvest Monthly Tracker Report.

Wave 34, March 2016

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

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

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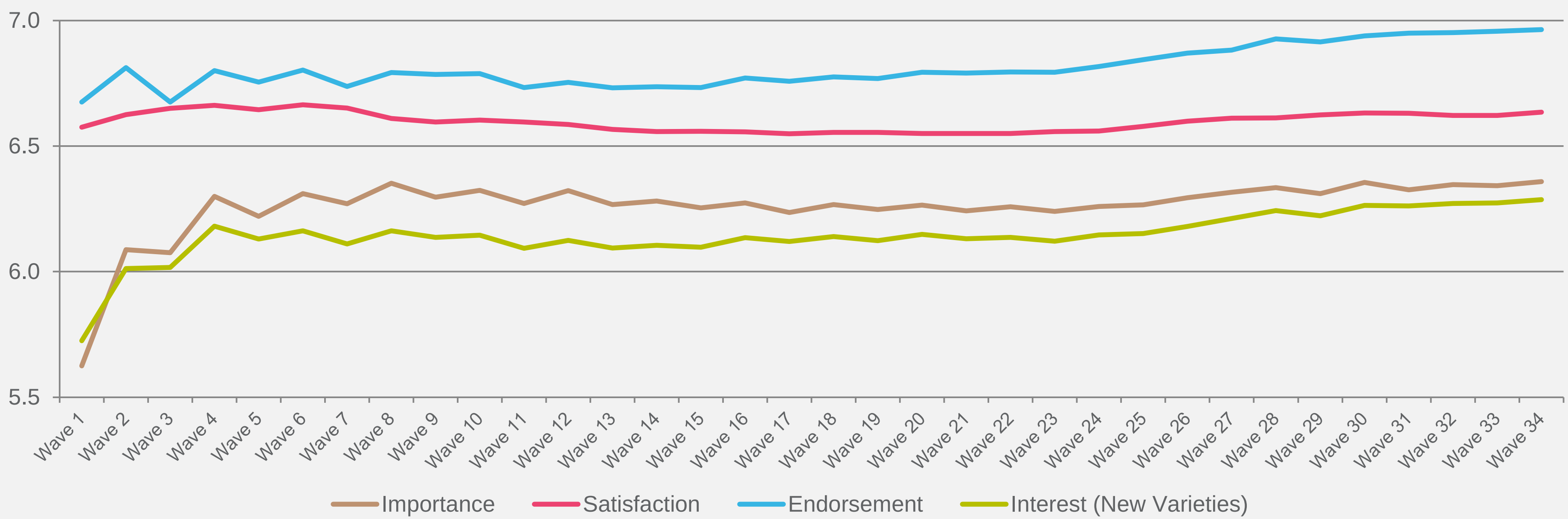
Contents.

Wave 34:
Executive Summary

Industry Insight.

Over the past three years, the Harvest Tracker has shown us that consumer satisfaction, endorsement and interest in new varieties of vegetables has increased over time (1%, 4% and 10%, respectively). The importance of having vegetables available has similarly increased (13%) and we know that the underlying trigger across all commodities is the health benefits of vegetables. Why then, one might ask, don't we consume the recommended amount of vegetables based on *maintaining* good health?!



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Industry Insight continued.

As the key note speaker at the Sensory Consumer Science conference in Sydney recently, Professor Hans Van Trijp from Wageningen University in the Netherlands suggested that although health is important, a “new age” motivation such as this must add on to (not substitute) traditional priorities such as taste, convenience and price. As humans, we are heavily influenced by instant gratification rather than long term advantage, and we see this in the day-to-day choices that we make, regardless of the importance *we say* we place on health.

So, what can be done to help consumers achieve their long term goals whilst helping growers sell a product that is predominantly chosen because it is healthy? Through many years of research, Hans would suggest pairing health benefits with immediate gratification in the marketing of a product. For instance, **health + my immediate comfort** = vegetables are sold on the benefits it provides older consumers, strengthening bones, warding off diabetes, helping to reduce heart disease, fighting cancer. Or **health + convenience** = root vegetable snacks, powdered solutions for shakes. Or **health + taste** = super sweet corn or peas.

If we can match the stated importance with the level of consumption it will be a “win-win” for the health of the country and the success of our growers.

Broccoli Grower Action Plan.

Wave 34 Fast Facts – Broccoli

- Consumer sentiment is in line with the Vegetable Average for all vegetables tracked thus far. There are high levels of satisfaction for broccoli.
- On average broccoli is purchased 4 times per month and consumed 10 occasions per month. Mainstream retailers are the main purchase locations.
- Consumers typically purchase 800g of broccoli per occasion, relatively consistent with previous months. Broccoli is perceived to be good value for money. Individual heads of broccoli are the preferred format.
- National pricing analysis revealed an average of $6.09 per kg, which is substantially higher than November 2015 prices.
- Overall awareness of broccoli types remains low. Over half of consumers are unable to recall any variety.
- The key motivations for purchasing broccoli are health and ease of preparation. The main barriers to purchase are that broccoli is not available in their area and that they don't want to waste any.
- Broccoli is expected to remain fresh for a week. Expectations of freshness are stable and in line with previous waves.

38% of consumers stated that having specific health and nutritional benefits was a trigger to purchase.

1.

Insight:

There is low interest in new varieties of broccoli, with both purchase and consumption declining this wave.

Short Term Recommendation:

Reinvigorate interest in broccoli through promoting broccoli leaves as a superfood, which are packed full of nutrients and fibre. This awareness of utilising the whole vegetable minimises waste, and supports the stem to root philosophy.

2.

Insight:

There was only one new product launched in Australia containing broccoli as an ingredient over the last three months.

Long Term Recommendation:

With the interest in specific health benefits on the rise, look to partner with other vegetables that consumers consider particularly healthy, including kale, cauliflower and sweetpotato. Any new products should call out health benefits and vitamin content on pack.

Chilli Grower Action Plan.

Wave 34 Fast Facts – Chilli

- Chillies hold strong importance to consumers and are likely to be recommended to family and friends. There is strong future purchase intent for chillies.
- Chillies are purchased 4 times a month and consumed on 11 occasions per month. Purchase is from mainstream and specialist retailers.
- Consumers generally purchase 300g of chillies, with recalled last spend at $3.90. Overall, chillies are perceived as fair value for money, slightly declining this wave.
- Pricing analysis revealed the average national price for long red chillies was $19.19 per kg, slightly higher than prices in November 2015.
- There is a high level of recall for chilli varieties. Jalapeno and birds eye have the greatest awareness amongst consumers.
- Main triggers for purchasing chillies are to use as an ingredient in dishes and taste. The key barriers to purchase are not wanting to waste any and consuming enough for their needs.
- Chillies are expected to remain fresh for approximately 11 days, and this freshness is met most of the time.

$3.90 was the recalled last spend by consumers in Wave 34.

1.

Insight:

Roasting chillies is on the rise and consumers are open to experimenting with chillies when cooking a new recipe.

Short Term Recommendation:

Different cooking styles will appeal to adventurous cooks, such as adding chilli to their roast vegetables for an increased spice and heat sensation. Inspire consumers at point of purchase with new recipe and cooking ideas.

2.

Insight:

Purchase and usage of chilli plants are consistently on the rise, yet awareness of chilli varieties fell this wave.

Long Term Recommendation:

Consumers need to be educated on the different varieties of chillies to ensure their repertoire of usage is expanded. This will create the need for multiple varieties rather than one variety that meets all needs.

Lettuce Grower Action Plan.

Wave 34 Fast Facts – Lettuce

- Lettuce holds high levels of importance and satisfaction with consumers. Future purchase intent has remained stable.
- Lettuce is purchased on average 4 times per month and consumed approximately 13 times per month. Purchase is primarily from mainstream retailers.
- On average, consumers are purchasing 700g of lettuce, which is consistent with the previous wave. Recalled last spend was $2.70. Value for money is perceived as good.
- Price tracking revealed an average price of $2.64 per Iceberg lettuce head. This is higher than prices from November 2015.
- There is a high level of awareness of lettuce types, especially Iceberg and Cos.
- The main motivations for purchasing lettuce are health and complementing other food. Not wanting to waste any and already consuming enough are the key barriers to purchase.
- Lettuce is expected to stay fresh for just over a week. Expectations of freshness are met most of the time, consistent with previous waves.

6.6/10 is the average consumer rating of lettuce's value for money.

1.

Insight:

Positively, short shelf life is decreasing as a barrier to purchase, with a subsequent increase in length of expected freshness.

Short Term Recommendation:

Maintain high levels of consumer satisfaction by continually communicating expected freshness and longevity through best before dates.

2.

Insight:

Taste is increasing as a trigger to purchase lettuce.

Long Term Recommendation:

Use taste descriptors to further differentiate lesser-known lettuce varieties as a influence to purchase. Varieties such as butter, oak and mesclun have low awareness with consumers, and managing consumers flavour expectations may encourage trial.

Sweet Corn Grower Action Plan.

Wave 34 Fast Facts – Sweet Corn

- Sweet corn holds high levels of satisfaction and interest for consumers, and they are likely to recommend sweet corn to family and friends.
- Purchase frequency of sweet corn is around 4 times per month and on average sweet corn is consumed on 6 occasions per month.
- On average, consumers purchase 0.9kg of sweet corn, with recalled last spend $3.30. Perceived value for money is good (6.9/10), which is higher than the previous wave.
- Analysis of pricing nationally revealed an average price of $0.96 per cob, which was lower than in November 2015 ($1.42 per cob).
- Awareness of sweet corn remains very low, with over two thirds of consumers unable to recall a type.
- Taste is the primary trigger to purchase. Ease of preparation is becoming a stronger influence on purchase across waves. Already consuming enough and not wanting to waste any are the main barriers to purchase.
- Consumers expect sweet corn to remain fresh for approximately 8 days, and this longevity is likely to be met most of the time.

114 new products were launched globally over the last three months.

1.

Insight:

This wave has seen an increase in perceived value for money and purchase of sweet corn because it's versatile.

Short Term Recommendation:

For vegetables to become a staple and regularly in the shopping basket, consumers need to perceive the vegetable as versatile. To increase this perception, provide consumers with cooking instructions, different cooking styles (BBQ, microwave) and alternative cuisine and recipe ideas, highlighting the suitability for all meals.

2.

Insight:

East of preparation is one of the main triggers to purchase.

Long Term Recommendation:

Explore New Product Development (NPD) opportunities centred around convenience. Examples include pre-cooked sweetcorn in ready-to-heat vacuum sealed packaging, which is appealing to general consumers but also the hospitality industry.

Green Peas Grower Action Plan.

Wave 34 Fast Facts – Green Peas

- Green peas hold high levels of importance and consumers are likely to recommend peas to family and friends. Future purchase intent looks stable.
- Green peas are purchased on average 4 times per month and consumed on 10 occasions per month. Purchase is primarily from mainstream retailers.
- On average, consumers are purchasing 600g of green peas, which is slightly lower than the previous wave. Recalled last spend was $3.80. Green peas are perceived to be good value for money.
- Price tracking revealed an average price of $13.53 per kg of snow peas, which has increased this wave.
- Over half of consumers are unable to recall a type of green pea. Snow Peas and Snap Peas have the highest level of recall.
- The main motivations for purchasing green peas are taste and ease of preparation. Already consuming enough and price are the key barriers to purchase.
- Green peas are expected to stay fresh for 8 days. Expectations of freshness are met most of the time.

65% of consumers purchase green peas because they taste great.

1.

Insight:

Adding colour to a meal, complementing other food and adding texture has increased as a trigger to purchase.

Short Term Recommendation:

Consumers want to know this information when purchasing peas. Outline the ‘crunchy’ or ‘crisp’ texture it will add to a dish, as well as the ideal cooking style to achieve that texture. Packaging should have clear windows so consumers can see the bright green colour.

2.

Insight:

This wave sees an increase in expense as a barrier to purchase green peas.

Long Term Recommendation:

Ensure that multiple sized pre-packaged options are available to consumers. Smaller packs with one or two servings will reduce the amount of investment required by consumers and thus the perception of expense.

Kale Grower Action Plan.

Wave 34 Fast Facts – Kale

- There are high levels of interest in kale, with consumers likely to recommend it to family and friends. There is strong future purchase intent, with one third of consumers indicating they intend to increase the amount they currently purchase.
- On average, kale is purchased 4 times per month, and consumed 9 occasions per month.
- On average, consumers purchase 700g of kale. Value for money is perceived to be fair.
- Analysis of pricing nationally revealed an average price of $4.10 per bunch, which is slightly higher than in November 2015.
- Awareness of kale varieties has continued to improve, however 59% of consumers are still unable to recall a type.
- Health and nutrition are the primary triggers to purchase. Already consuming enough and wanting a variety are the main barriers to purchase.
- Consumers expect kale to remain fresh for a week, and this longevity is likely to be met most of the time.

7 days is the expected length of freshness for kale.

1.

Insight:

There is greater awareness of different kale varieties.

Short Term Recommendation:

To further differentiate kale varieties in the consumer's mind, highlight the alternate flavour and texture profiles that each varieties will bring to a dish. Promote this information on-pack and at point of sale.

2.

Insight:

Taste is declining as a trigger to purchase.

Long Term Recommendation:

Manage consumers expectations with flavour descriptions on pack. Providing recipe ideas where kale is an ingredient, rather than the hero of the dish. This may encourage trial with consumers who are less familiar with the vegetable.

Leek Grower Action Plan.

Wave 34 Fast Facts – Leek

- Consumer sentiment for leeks are in line with the Vegetable Average.
- Leeks are purchased on average twice per month and consumed four times per month, slightly lower than the previous wave. Purchase is primarily from mainstream retailers.
- On average consumers are purchasing 700g of leek. Recalled last spend was $3.10, with value for money perceived to be fair.
- Price tracking revealed an average price of $2.32 per leek, relatively consistent with past waves.
- Awareness of leek types is very low, with 85% of consumers unable to recall a type.
- The main motivations for purchasing leeks are to use as an ingredient in dishes and that they taste great. Already consuming enough and not wanting to waste any are the key barriers to purchase.
- Leeks are expected to stay fresh for over a week. Expectations of freshness are met most of the time.

5 products containing leek were launched in Australia over the last three months.

1. Insight:

Purchase from markets and bunched leeks are on the rise.

Short Term Recommendation:

Investigate alternative supply channels for leek distribution, including farmers and public markets. Additionally, explore multiple formats for distribution, including individual and bunched leeks.

2. Insight:

Leek is primarily being cooked in soup. However, new product development overseas is also incorporating leek into main meals.

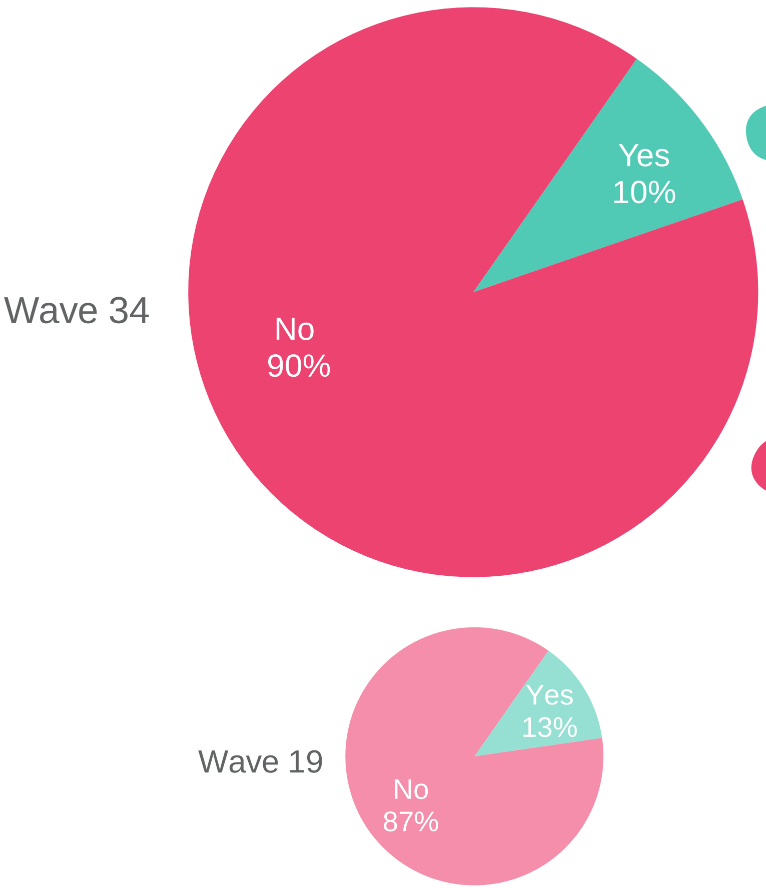
Long Term Recommendation:

Investigate new product development that includes leek in pre-prepared meal products. Promote alternative cooking styles at point of sale to encourage a greater versatility in usage of leek.

Wave 34:
Response to Ad hoc Questions

One in 10 consumers have purchased vegetables online, consistent with levels in Wave 19. Those who had purchased online cited convenience and delivery. However, the large majority had never ordered vegetables online as they preferred to see, pick and choose their own fresh vegetables.

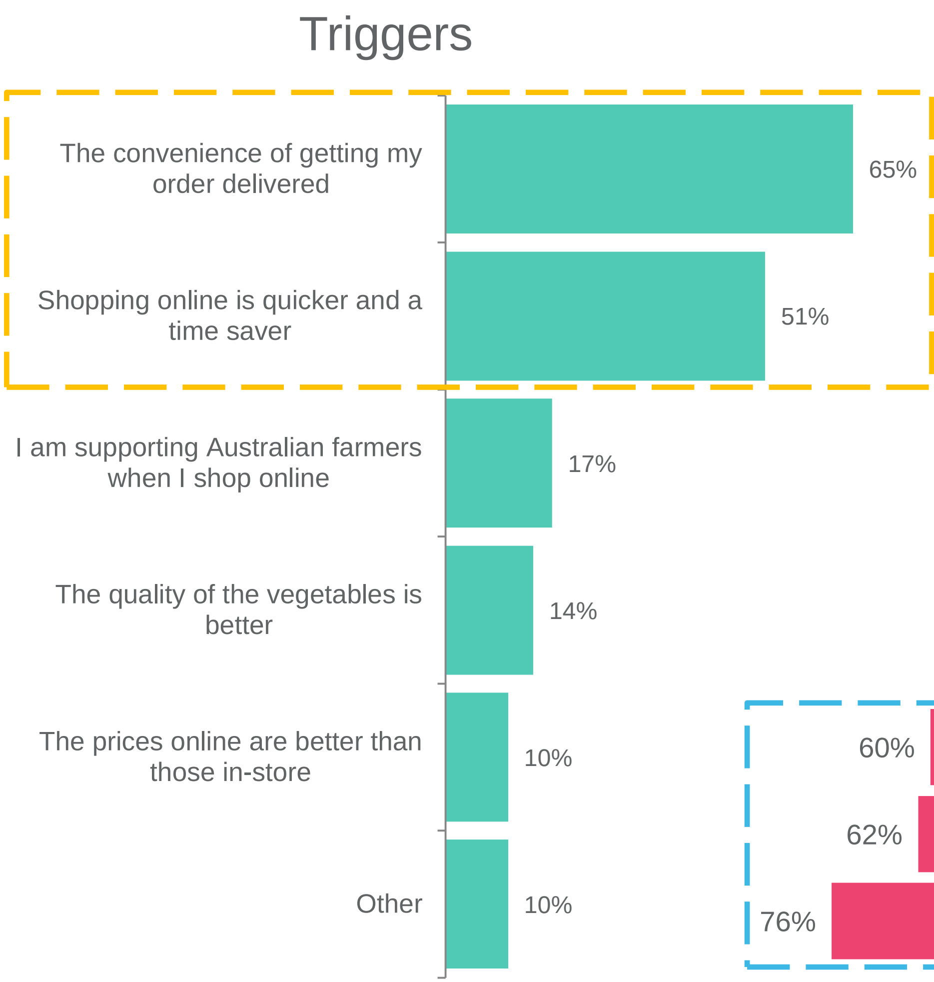
Purchased Vegetables Online

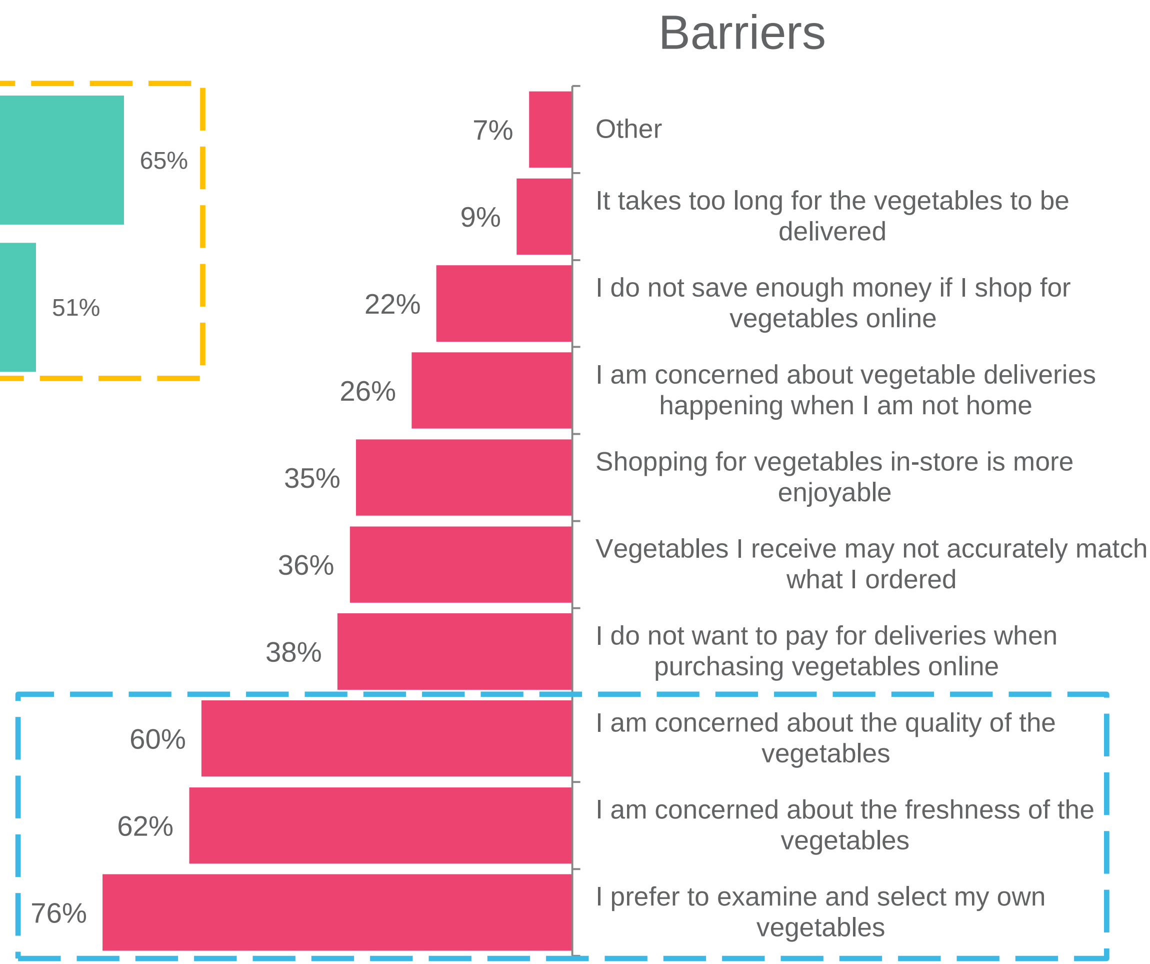


Reasons

QAHW34Q1 Have you ever purchased vegetables online?
Word Cloud= the larger the word, the more times it was mentioned by respondents
Wave 19 N=696, Wave 34 N=624

The key triggers to purchasing fresh vegetables online are based on convenience. In contrast, the key barriers to purchase are consumers' preference for examining and selecting their own vegetables, and concerns of freshness and quality.





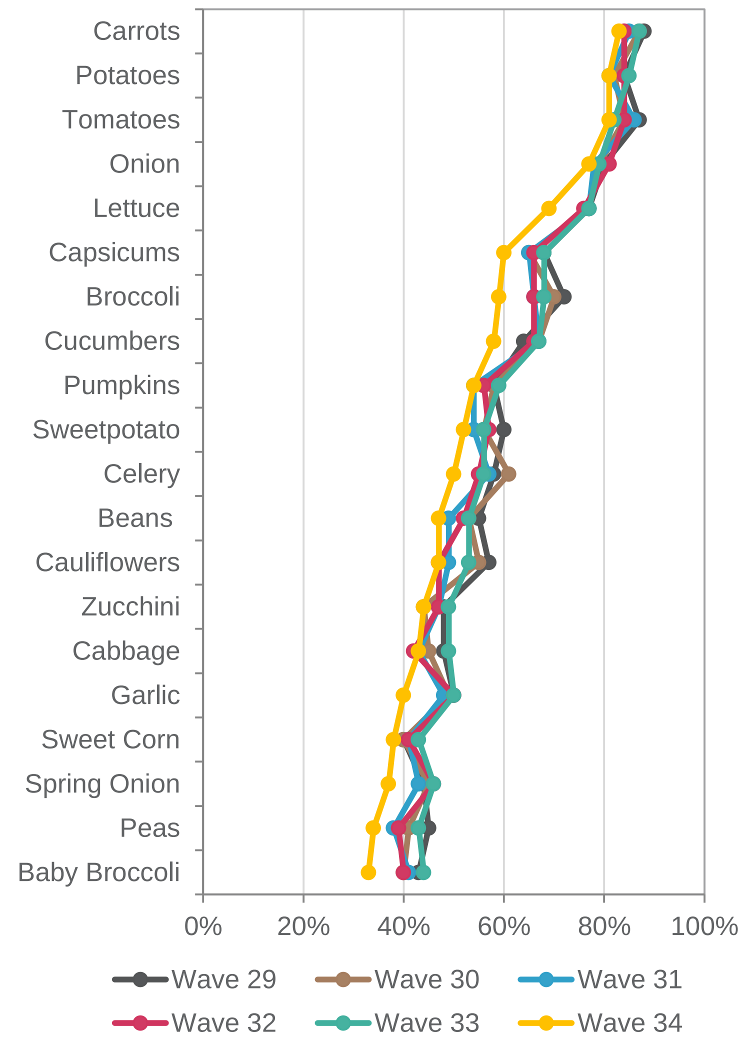
QAHW34Q2 What are the main triggers to purchasing fresh vegetables online? (N=63)
QAHW34Q4 What are the main barriers to purchasing fresh vegetables online? (N=624)

Wave 34: Overall Vegetable Tracking

Top 20 Vegetables Purchased Last Month

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

General vegetable purchase in March 2016 appeared lower than previous waves. The biggest declines in purchases were seen in baby broccoli, garlic, cucumber, broccoli, capsicum and lettuce.



Sample Wave 34 N=1092 *(base in higher as Q appears in Screener)*
S8. Which of the following fresh vegetables have you purchased in the last month?

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Category Health Explained.

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

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

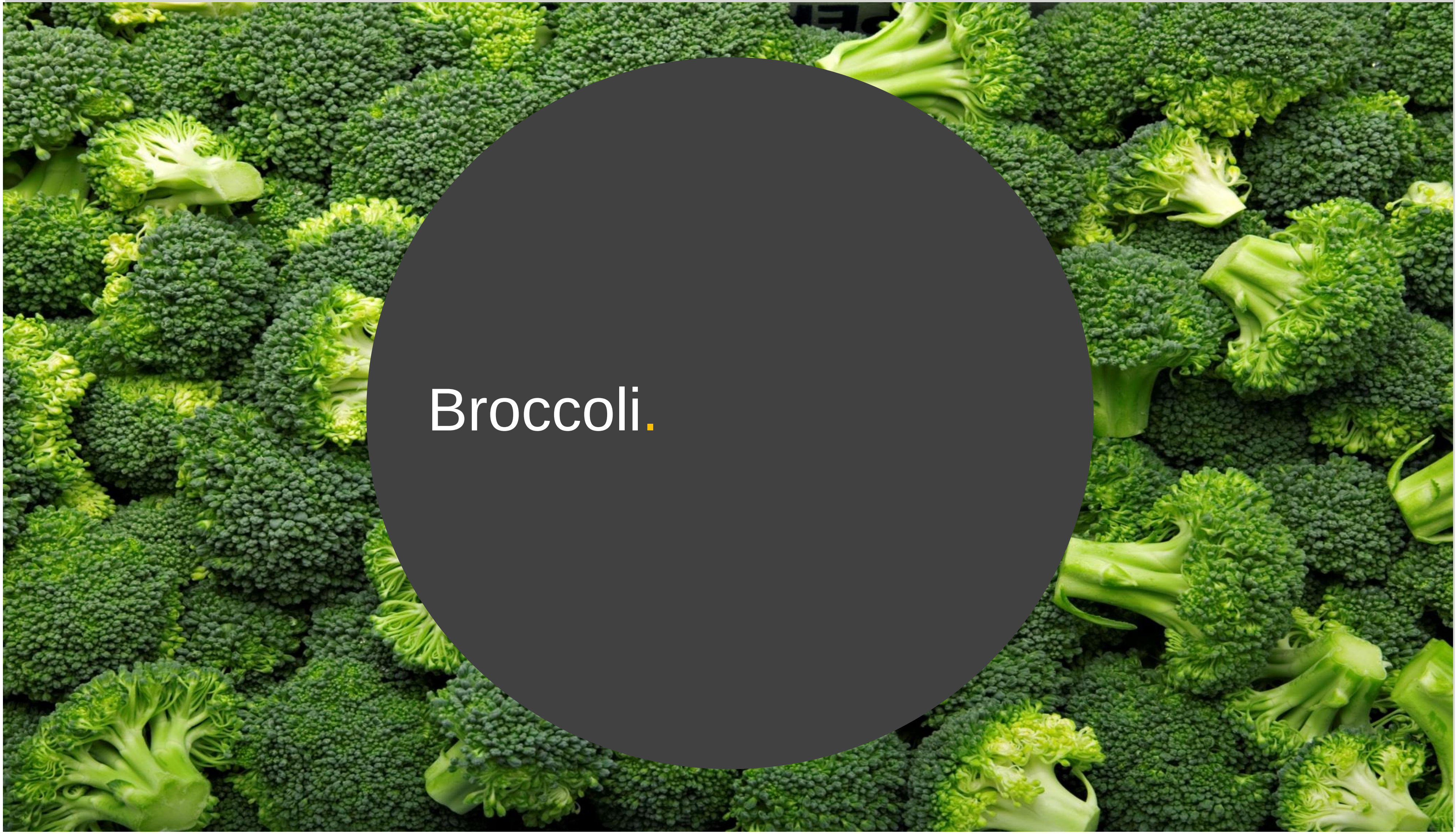
- How **important** to you is having a range of *commodity* available in the store where you usually shop?
- How **satisfied** or dissatisfied are you with the range of *commodity* currently available?
- How likely would you be to **recommend** *commodity* to your family and friends?
- How interested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

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

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

	Broccoli	Chillies	Lettuce	Sweet Corn	Green Peas	Kale	Leek	Vegetable Average
Importance	6.4	6.9	6.7	6.8	7.2	6.6	6.5	6.4
Satisfaction	7.1	6.6	7.6	7.0	7.1	6.4	6.6	6.6
Endorsement	7.1	7.1	6.8	7.5	7.3	7.2	6.9	7.0
Interest (New Varieties)	6.1	7.1	6.2	6.6	6.8	6.8	6.5	6.3
Future Purchase								
More	8%	14%	8%	15%	16%	32%	15%	15%
Same	91%	85%	91%	83%	83%	66%	84%	83%
Less	1%	1%	2%	2%	1%	2%	0%	1%

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



Broccoli.

Both consumption and purchase frequency of broccoli have slightly declined this wave.

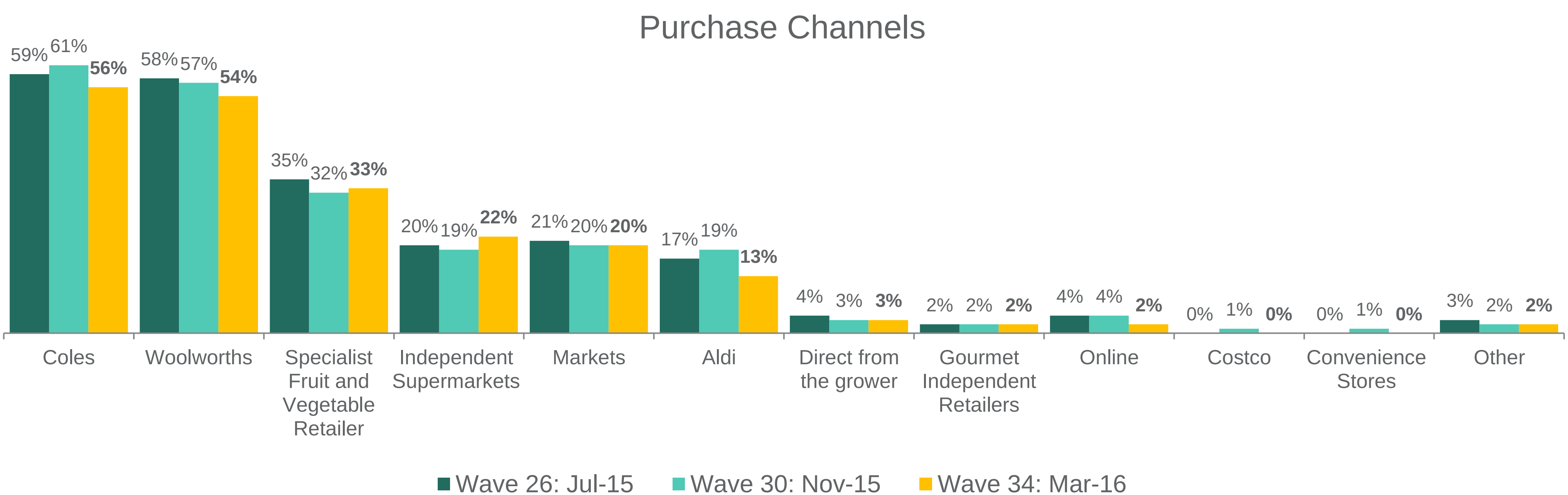
Purchase is typically from mainstream retailers, with specialist vegetable retailers also a popular channel.

Average Purchase **3.9** times per month

▲ 4.5 times, Wave 26
▲ 4.1 times, Wave 30

Average Consumption **9.5** times per month

▲ 10.5 times, Wave 26
▲ 10.5 times, Wave 30



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 26 N=309, Wave 30 N=302, Wave 34 N=303

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

Average Spend and Price Sensitivity.

Average weight of purchase

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

– 800g, Wave 26
– 800g, Wave 30

Recalled last spend

The average recalled last spend in March was **$3.30**, which has continued to decline over the last three waves.

▲ $3.50, Wave 26
▲ $3.40, Wave 30

Value for money

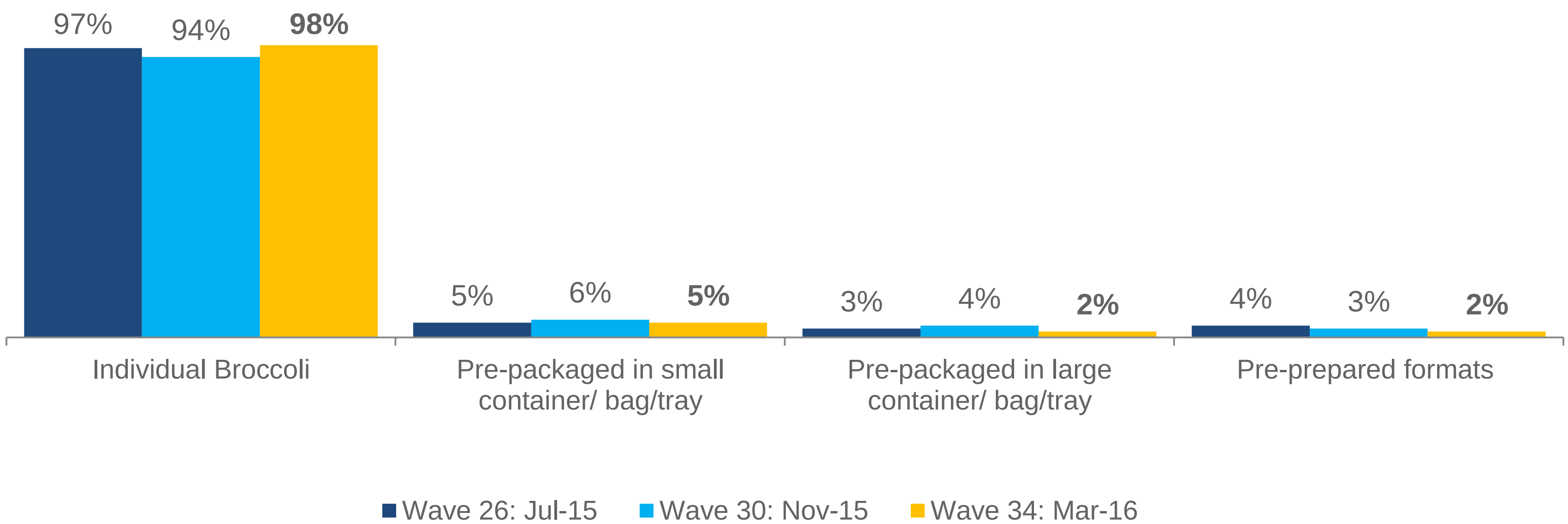
On average, consumers perceived broccoli to be good value for money **(6.4/10).** This has remained stable with the previous wave.

▼ 6.2/10, Wave 26
– 6.4/10, Wave 30

Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample: Wave 26 N=309, Wave 30 N=302, Wave 34 N=303

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

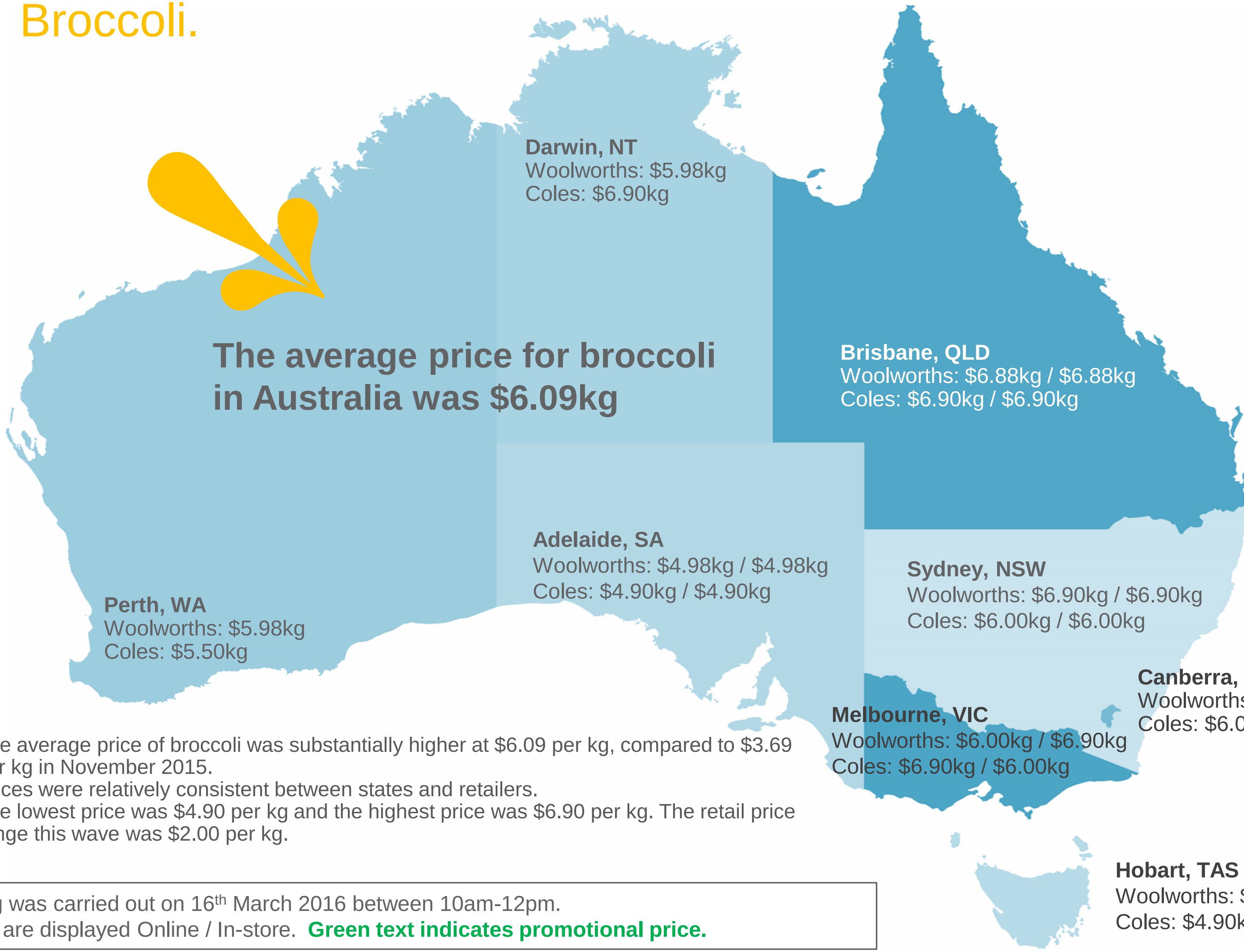
Individual broccoli heads are the main format purchased by consumers. Pre-packaged formats in small and large containers, bags and trays are also purchased options.



Q4b In what fresh formats do you typically purchase Broccoli?
Sample: Wave 26 N=309, Wave 30 N=302, Wave 34 N=303

Online and In-store Commodity Prices.

Broccoli.

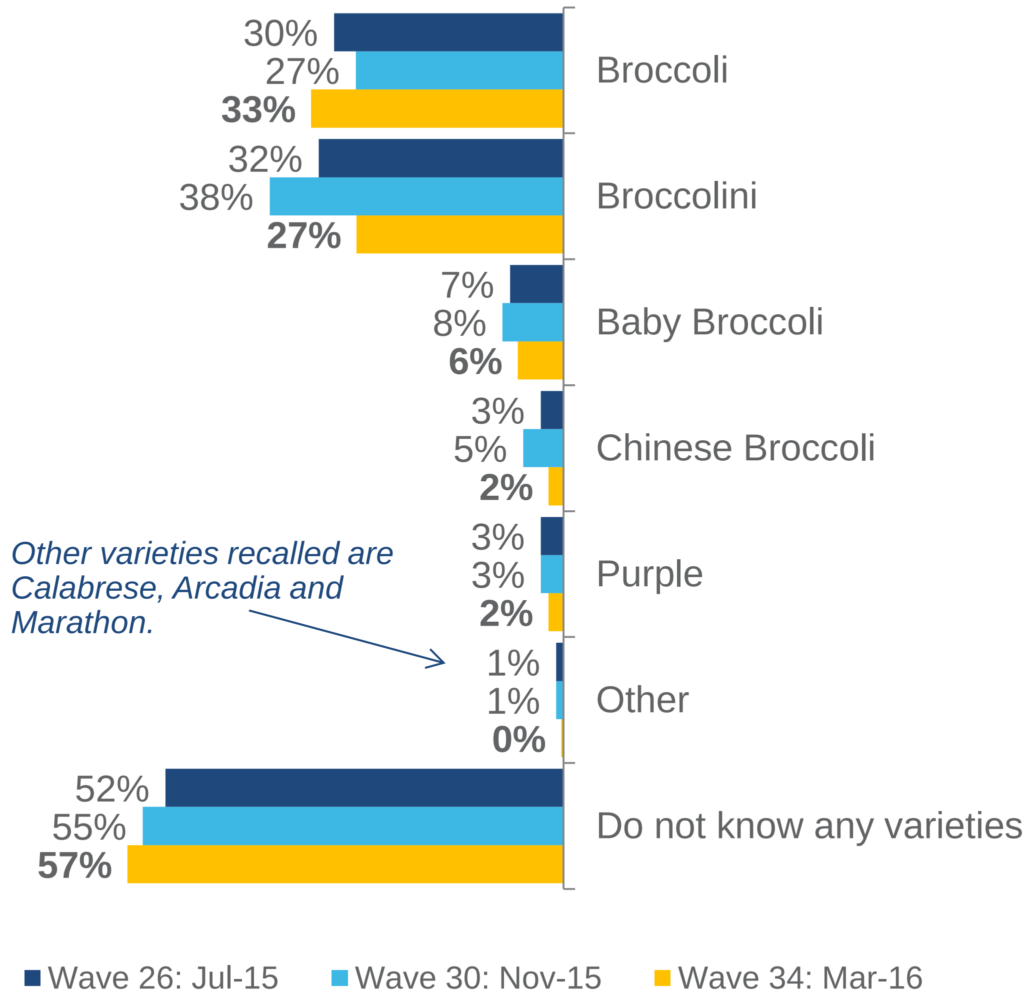


- The average price of broccoli was substantially higher at $6.09 per kg, compared to $3.69 per kg in November 2015.
- Prices were relatively consistent between states and retailers.
- The lowest price was $4.90 per kg and the highest price was $6.90 per kg. The retail price range this wave was $2.00 per kg.

Pricing was carried out on 16th March 2016 between 10am-12pm.
Prices are displayed Online / In-store. **Green text indicates promotional price.**

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

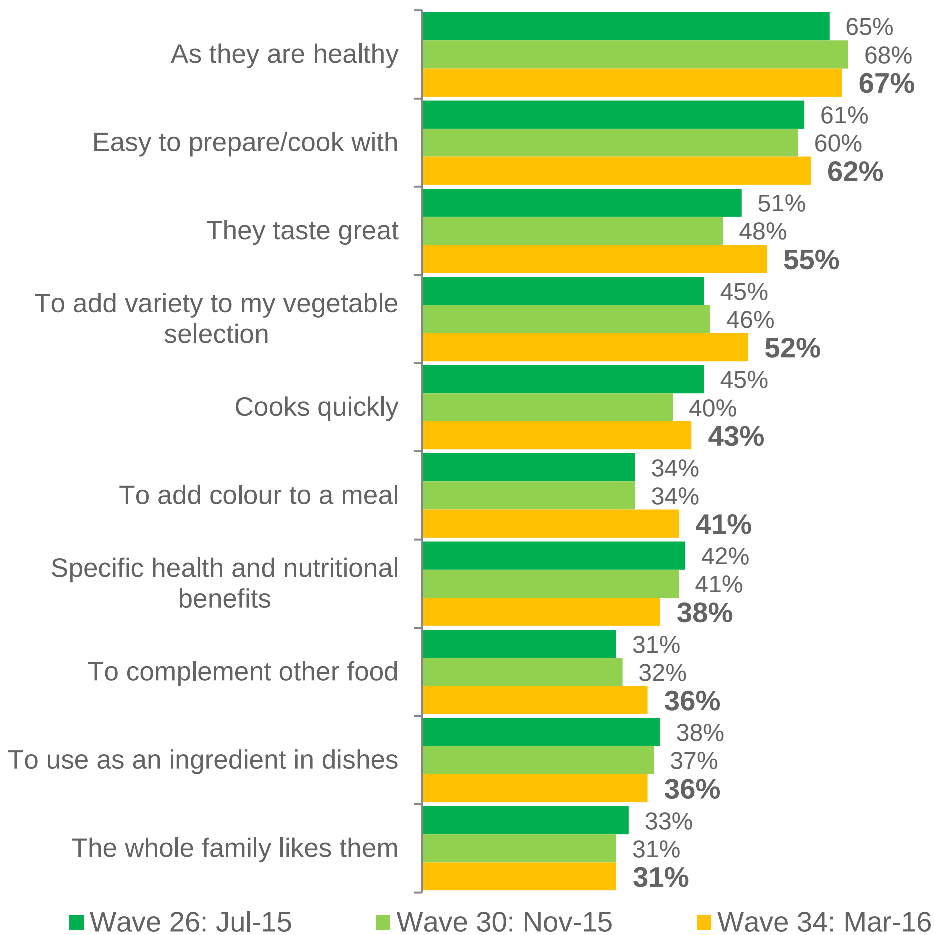
Consumers recall ‘Broccolini’ and generic names, such as ‘broccoli’, with very few consumers able to name specific types.



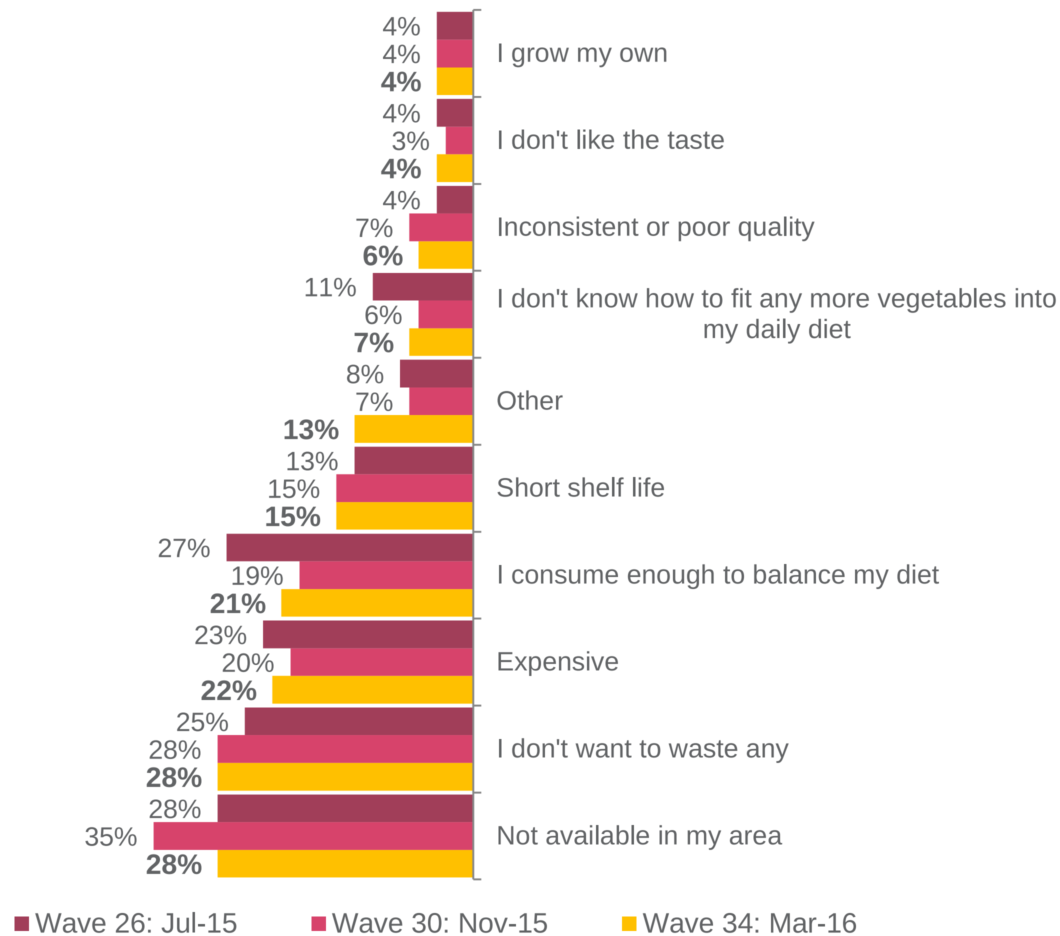
Q6a. What varieties of <commodity> are you aware of? (unprompted)
Sample: Wave 26 N=309, Wave 30 N=302, Wave 34 N=303

Health and convenience continue to be the main influences on broccoli purchase. The main barrier to purchase is broccoli not being available in their area. This wave sees a noticeable increase in taste as a trigger to purchase.

Triggers



Barriers



Q7. Which of the following reasons best describes why you purchase <commodity>?
Q8. Which reason best describes why you don't buy <commodity> more often?
Sample: Wave 26 N=309, Wave 30 N=302, Wave 34 N=303

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

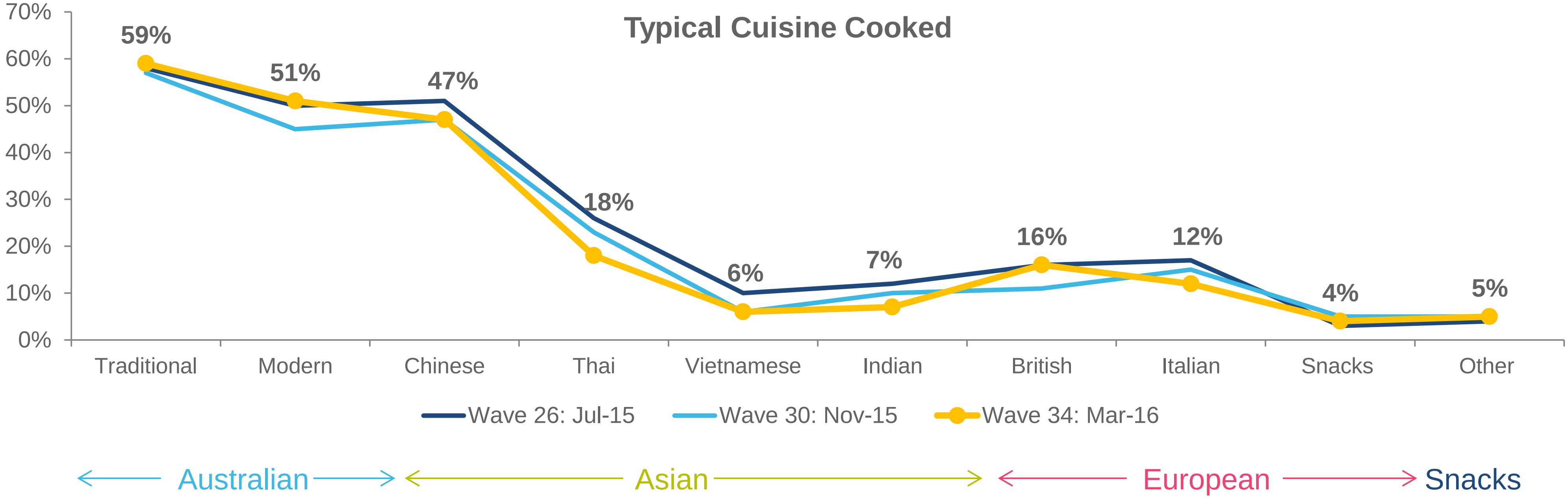
Top 5 Consumption Occasions

	Wave 30	Wave 34
Dinner	77%	**79%**
Family Meals	62%	**59%**
Weekday Meals	46%	**50%**
Weekend Meals	39%	**40%**
Quick Meals	39%	**35%**

11% used broccoli when cooking a new recipe

▲ 14%, Wave 26

▲ 13%, Wave 30



Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?
Sample: Wave 26 N=309, Wave 30 N=302, Wave 34 N=303

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

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

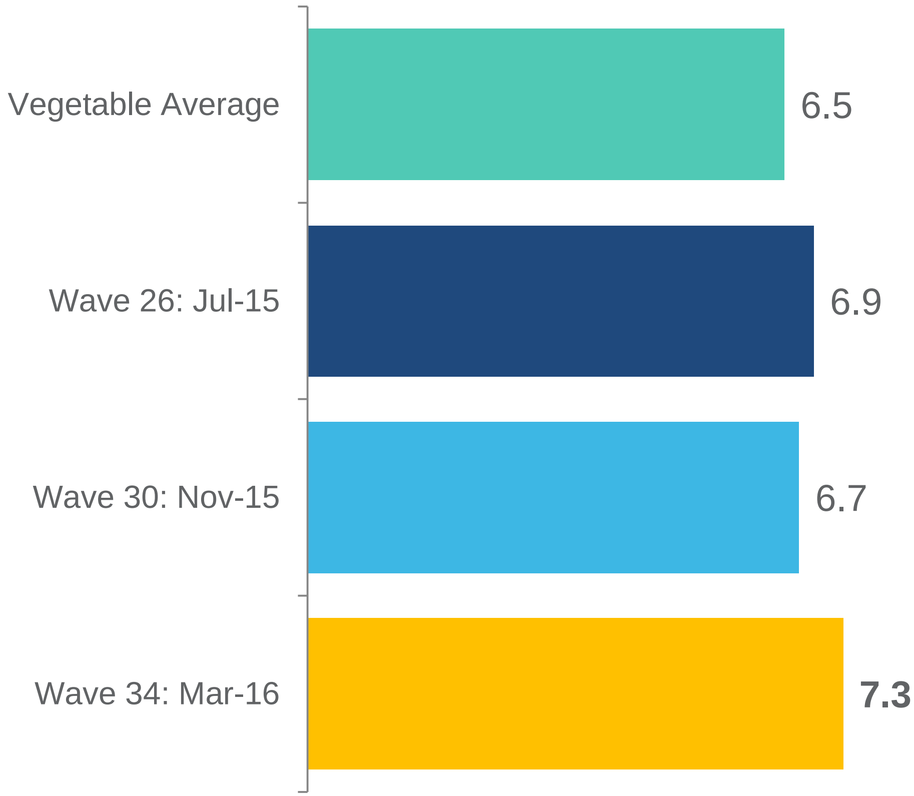
Accompanying Vegetables

Carrot	68%
Potato	63%
Cauliflower	39%
Sweet Potato	36%
Pumpkin	34%

Top 10 Cooking Styles			
	Wave 26	Wave 30	**Wave 34**
Steaming	66%	68%	**67%**
Stir frying	57%	47%	**47%**
Boiling	39%	36%	**35%**
Microwave	26%	26%	**25%**
Soup	16%	13%	**15%**
Sautéing	11%	10%	**11%**
Slow Cooking	10%	7%	**10%**
Raw	12%	10%	**9%**
Frying	8%	9%	**7%**
Roasting	8%	6%	**6%**

Q9. How do you typically cook <commodity>?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
Sample: Wave 26 N=309, Wave 30 N=302, Wave 34 N=303

Importance of provenance has increased this wave, sitting above the Vegetable Average. Knowing that broccoli is grown in Australia still remains highly important information for consumers.



8.5

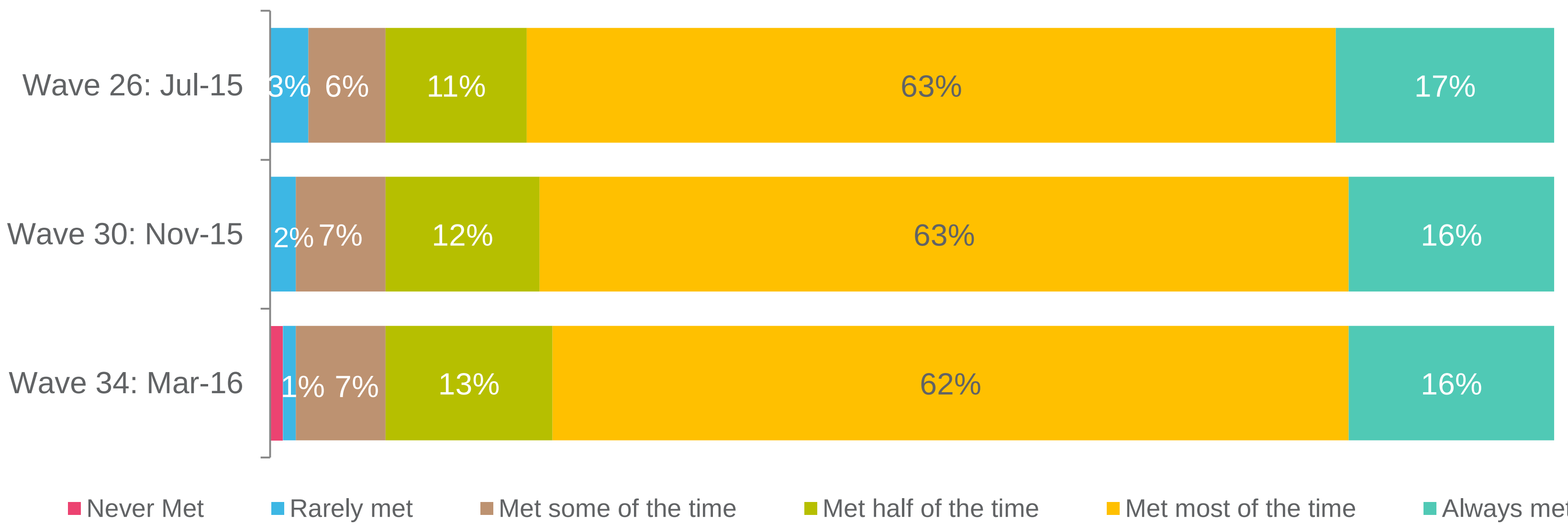
Q14. When purchasing <commodity>, how important is Provenance to you?
Q15. And when purchasing Chillies, how important is that it is grown in Australia?
Sample: Wave 26 N=309, Wave 30 N=302, Wave 34 N=303

Broccoli is expected to stay fresh for just over a week, consistent with past waves. Expectations of freshness are being met most of the time.

Expected to stay fresh for **7.7** days

▼ 7.4 days, Wave 26
— 7.7 days, Wave 30

Expectations Met



Q12. How long do you expect <commodity> to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy <commodity> ?
Sample: Wave 26 N=309, Wave 30 N=302, Wave 34 N=303

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

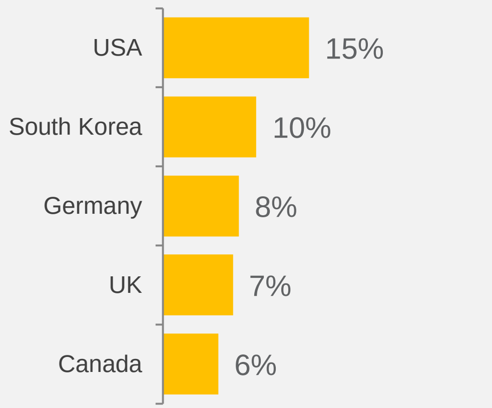
Broccoli Product Launch Trends.

Broccoli Global Launches

January – March 2016

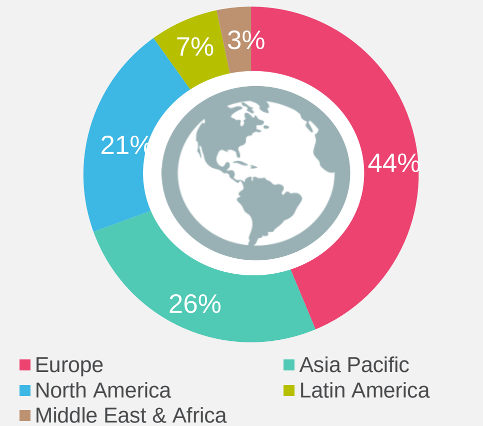
There were 334 new broccoli products launched globally over the last 3 months. Top categories for launch were fruit & vegetables and meals. These launches occurred primarily across Europe and Asia Pacific.

Country

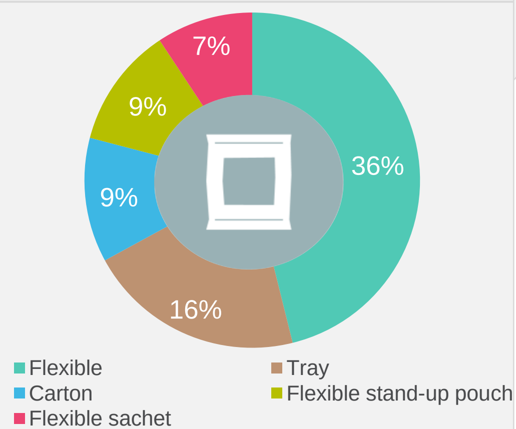


334 Global NPDs

Region



Top Pack Formats



Categories

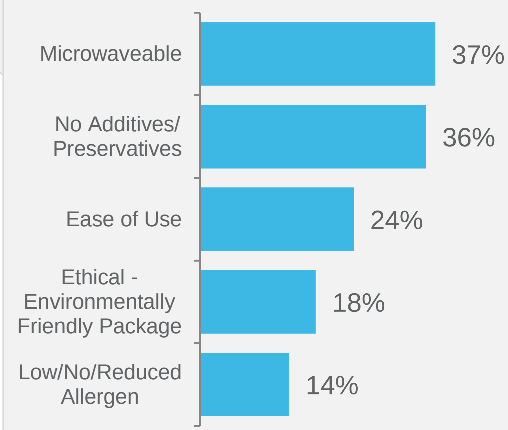
Fruits & Vegetables 22%

Meals 21%

Soup 7%

Skincare 7%

Top Claims



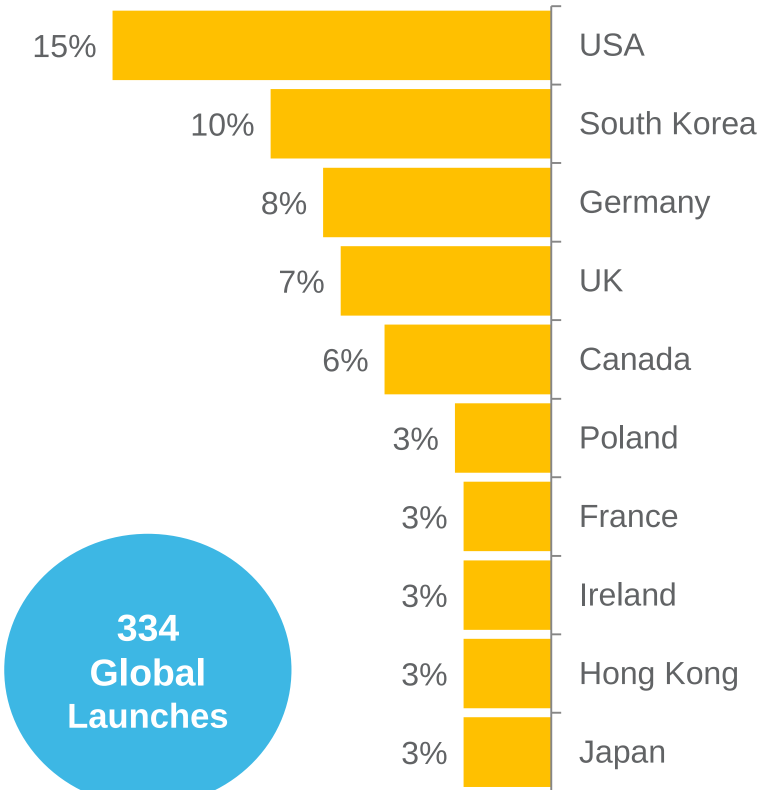
Broccoli Product Launches:
Last 3 Months (January – March 2016)
Summary

- A total of 344 products containing broccoli as an ingredient were launched globally within the last 3 months, which is up from the previous wave.
- There was only 1 product launched containing broccoli launched in Australia in the past 3 months (see upcoming slide for more detail).
- Europe (44%), Asia Pacific (26%) were the top regions for broccoli product launches.
- Flexible pack formats (36%) are the predominant form of packaging for launches in the last 3 months. This is consistent with the previous waves.
- The top categories for launches were fruit and vegetable products (22%), meals (21%), and soups (7%).
- The core claims used for launches centred around convenience and health, with microwaveable being the top claim (37%), no additives or preservatives (36%) and ease of use (24%).
- The most innovative launch found was Raw Broccoli Powder in Sweden (see upcoming slides for more detail).

Source: Mintel (2016)

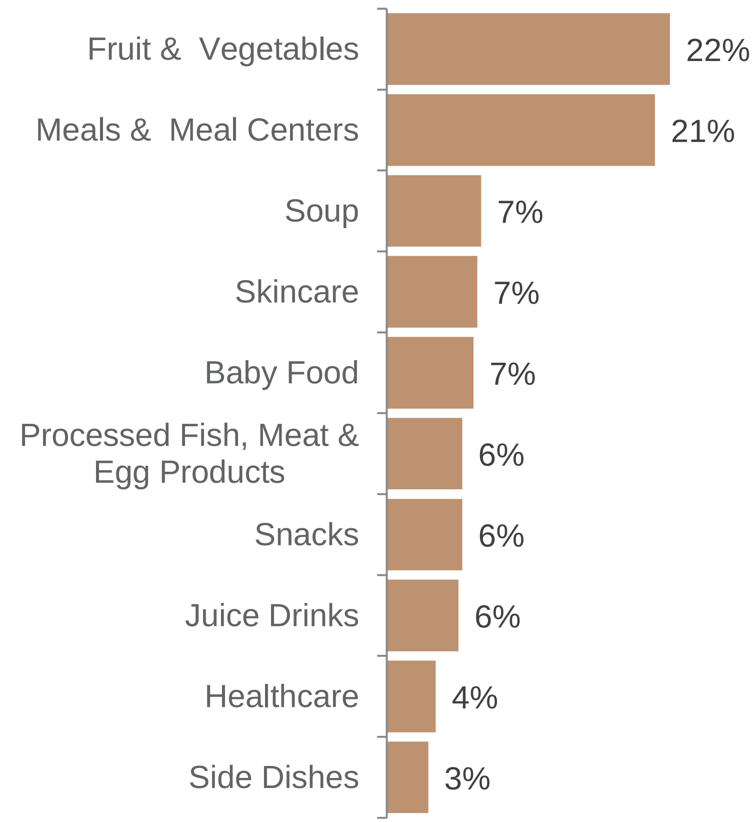
USA was the dominant country for broccoli product launches. Fruit & vegetables, meals and soup were the main product categories.

Top Launch Countries



334 Global Launches

Top Launch Categories



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Microwaveable is the most used claim on broccoli products, with no additives/preservatives also a popular claim. Flexible packaging is utilised across all regions, consistent with past waves.

Pack Formats Used

Global	Flexible	36%
Global	Tray	16%
Global	Carton	9%
Europe	Flexible	39%
Europe	Tray	21%
Europe	Carton	12%
Asia Pacific	Flexible	29%
Asia Pacific	Flexible Stand-Up Pouch	15%
Asia Pacific	Bottle	10%

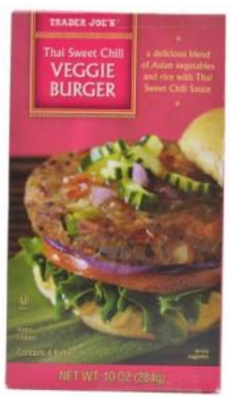
Top Claims Used

Global	Microwaveable	37%
Global	No Additives/Preservatives	36%
Global	Ease of Use	24%
Europe	Microwaveable	37%
Europe	No Additives/Preservatives	32%
Europe	Vegetarian	24%
Asia Pacific	No Additives/Preservatives	38%
Asia Pacific	Microwaveable	22%
Asia Pacific	Babies & Toddlers (0-4)	20%

Innovative Broccoli Launches:
L3M (January – March 2016)

Trader Joe's Thai Sweet Chili Veggie Burger (USA)

Trader Joe's Thai Sweet Chili Veggie Burger is a delicious blend of Asian vegetables and rice with Thai sweet chili sauce. The kosher product is described as a perfect blend of sweet and spicy and said to be great by itself, on a bun or crumbled on top of a salad of leafy greens. It can be heated in the microwave, and retails in a 10-oz. pack containing four patties.



Claims:
Kosher, Microwaveable

Amy's Gluten Free Pesto Rice Crust Pizza (USA)

Amy's Gluten Free Pesto Rice Crust Pizza is made with homemade pesto, garden-fresh organic tomato slices, and organic broccoli florets, partly skimmed mozzarella and Monterey jack cheeses. The kosher and organic certified product is free from GMO, trans fat, MSG, preservatives, rBST hormone-free milk, animal enzymes or animal rennet. It retails in a 11.2-oz. recycled and recyclable pack.

Claims:
No Additives/Preservatives, Kosher, Low/No/Reduced Fat, Organic, Gluten-Free, Low/No/Reduced Transfat, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Package, Hormone Free, GMO-Free

Iglo G'sunden Appetit! Broccoli Patties (Austria)

Iglo G'sunden Appetit! Broccoli-Laibchen (Broccoli Patties) have been repackaged and are now available in a newly designed pack. The quality product is free from flavour enhancers and artificial flavourings and can be crisply oven baked or fried. It retails in a 300g pack containing four units, featuring the Forever Food Together and Facebook logos as well as a QR code.

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

Organics Happy Baby Superfood Munchies Broccoli, Kale & Cheddar Baked Cheese & Grain Snack (USA)

Organics Happy Baby Superfood Munchies Broccoli, Kale & Cheddar Baked Cheese & Grain Snack has been relaunched with a new name, previously known as Happy Baby Happy Munchies. The kosher and USDA organic certified product contains 3g wholegrain, 32mg choline to support brain and eye health and nine essential vitamins and minerals.

Claims:
Other (Functional), Kosher, Organic, Babies & Toddlers (0-4), Gluten-Free, Antioxidant, Wholegrain, Brain & Nervous System (Functional), Low/No/Reduced Allergen, Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Ethical - Human, GMO-Free

Source: Mintel (2016)

Innovative Broccoli Launches:
L3M (January – March 2016)

P.F. Chang's Home Menu Beef with Broccoli (USA)

P.F. Chang's Home Menu Beef with Broccoli has been reformulated with better tasting beef. It comprises beef with a savory garlic soy sauce and broccoli. The USDA certified, microwaveable product is retailed in a 22-oz. pack featuring a Facebook logo.

Claims:
Microwaveable, Social Media

Lebepur Raw Broccoli Powder (Sweden)

Lebepur Broccolipulver (Raw Broccoli Powder) is now available. It contains 100% gently dried and ground organic broccoli and is said to be perfect to increase the value of green smoothies quick and simply with just a small amount. This 100% pure raw product is free from additives, is suitable for vegans and retails in 125g pack featuring the EU Green Leaf and BIO logos.

Claims:
No Additives/Preservatives, Organic, Vegan

Brad's Raw Garlic-Ity Split! Broccoli Poppers (USA)

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

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

Condieta Linha Baixa Calorias Filet Mignon with Spices, Paulista Couscous, and Broccoli Cream (Brazil)

Condieta Linha Baixa Calorias Filé Mignon com Especiarias, Cuscuz Paulista e Creme de Brócolis (Filet Mignon with Spices, Paulista Couscous, and Broccoli Cream) is now available. This gourmet, healthy dish is microwavable, and contains no colorants or preservatives. It is low in calories, and retails in a 300g pack.

Claims:
No Additives/Preservatives, Low/No/Reduced Calorie, Microwaveable

Source: Mintel (2016)

Innovative Broccoli Launches:
L3M (January – March 2016)

Nacho Loco Broccoli & Ricotta Burritos (Brazil)

Nacho Loco Burritos de Brócolis com Ricota (Broccoli & Ricotta Burritos) are ready to heat and serve. The microwavable product is mildly seasoned and retails in a 520g pack containing four burritos, and featuring a recipe suggestion, Facebook and Instagram page links.

Claims:
Microwaveable, Ease of Use, Social Media

Tesco Edamame Stir Fry (UK)

Tesco Edamame Stir Fry is now available. The product is described as a selection of vegetables with Edamame beans and pea shoots. It is ready to cook, has been washed, and can be prepared in five minutes. This vegetarian product retails in a 280g pack.

Claims:
Vegetarian, Ease of Use

Organique Vegee Baked Organic Veggie Snacks (Czech Republic)

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

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

M&M Meat Shops Tempura Vegetables (Canada)

M&M Meat Shops Tempura Vegetables are comprised of zucchini, spinach, cauliflower, carrots, red and yellow bell peppers and broccoli, all lightly coated in an exclusive, crispy tempura batter. This product, which is a source of fibre and low in saturated fat, retails in a 500g pack.

Claims:
Low/No/Reduced Saturated Fat

Source: Mintel (2016)

Australian Broccoli Launches:
L3M (January – March 2016)

M.E.B. Foods Superfoods Chia, Spinach, Kale & Broccoli Organic Wraps

M.E.B. Foods Superfoods Chia, Spinach, Kale & Broccoli Organic Wraps are now available. According to the manufacturer, spinach contains more nutrients than any other food on earth; and is loaded with vitamins A, K, D, E and other trace minerals. It is a good source of omega-3 fatty acids and contains anti-cancer and anti-inflammatory antioxidants and alkalizes the body. Kale contains a type of phytonutrient that appears to lessen the occurrence of a wide variety of cancers including breast and ovarian.

Claims:
High/Added Fiber, Other (Functional), Microwaveable, Organic, Vitamin/Mineral Fortified, Antioxidant, Bone Health, High Protein, Social Media

Source: Mintel (2016)

Chillies.

Consumption frequency has increased this wave, whilst purchase frequency remains stable.

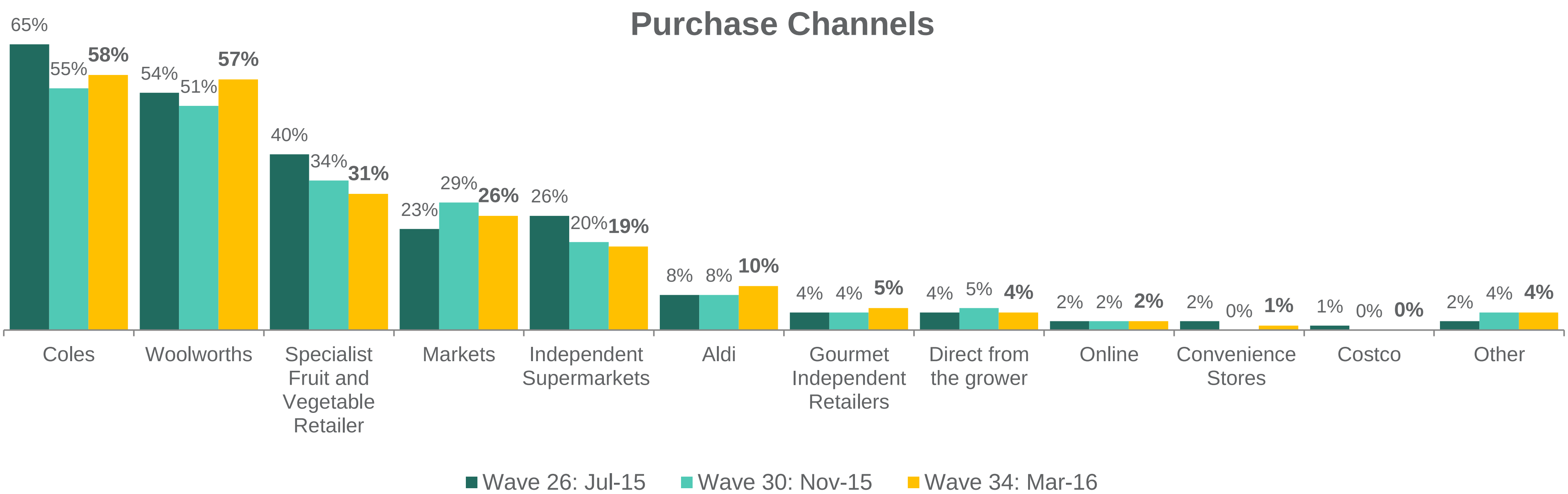
Coles and Woolworths remain the primary purchase channels for chillies, with specialist retailers seeing a continuous decline over the past four waves.

Average Purchase **3.7** times per month

- 3.8 times, Wave 26
- 3.7 times, Wave 30

Average Consumption **11.1** times per month

- 12.0 times, Wave 26
- 10.4 times, Wave 30



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 26 N=201, Wave 30 N=204, Wave 34 N=202

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Average Spend and Price Sensitivity.

Average weight of purchase

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

300g, Wave 26
300g, Wave 30

Recalled last spend

Recalled last spend on chilli purchase was **$3.90**, relatively consistent with the previous waves.

$4.00, Wave 26
$4.00, Wave 30

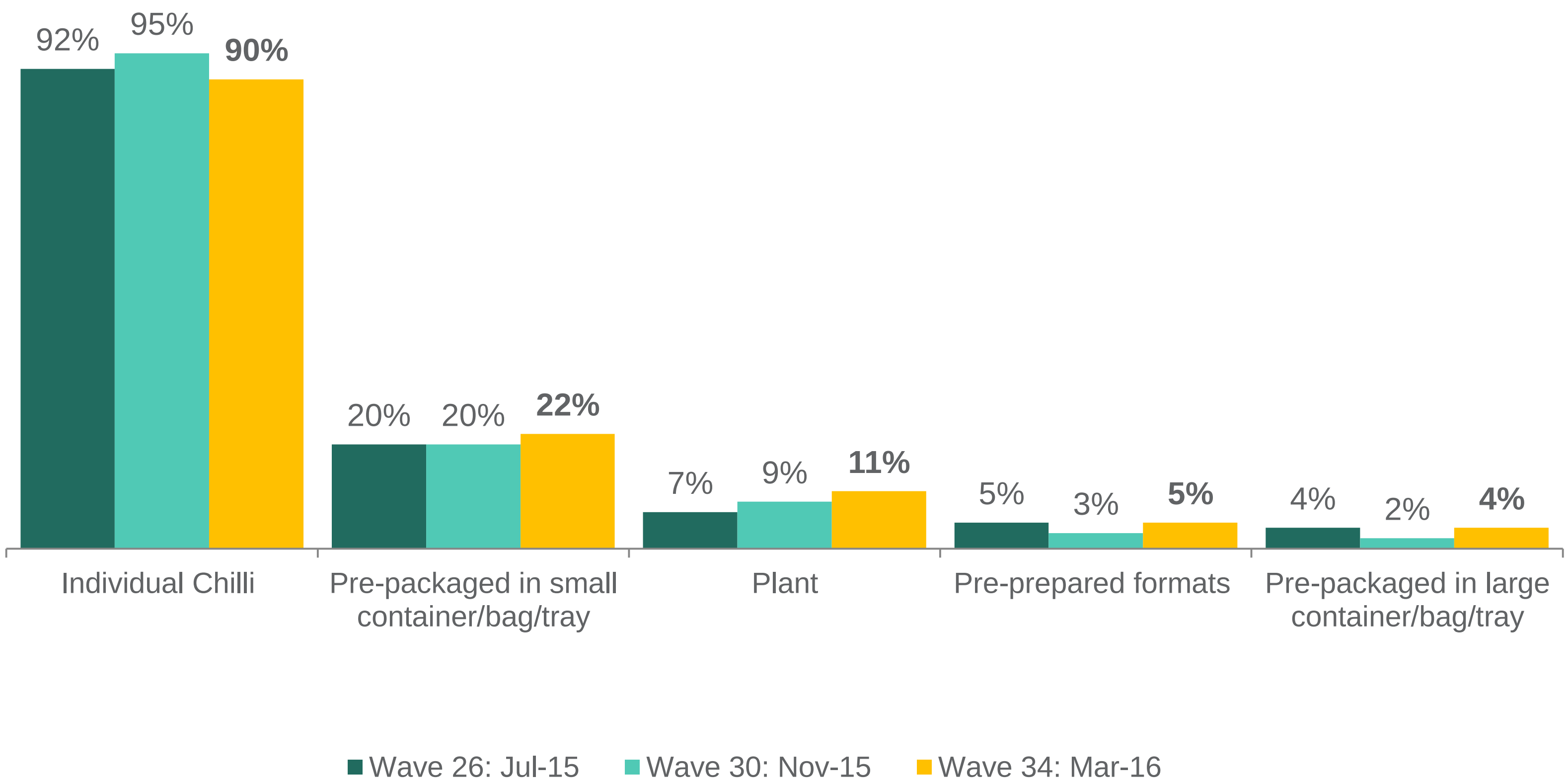
Value for money

Consumers' perceived value for money was relatively fair **(6.1/10)**, which has slightly declined this wave.

6.4/10, Wave 26
6.4/10, Wave 30

Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? *0-10 scale*
Sample Wave 26 N=201, Wave 30 N=204, Wave 34 N=202

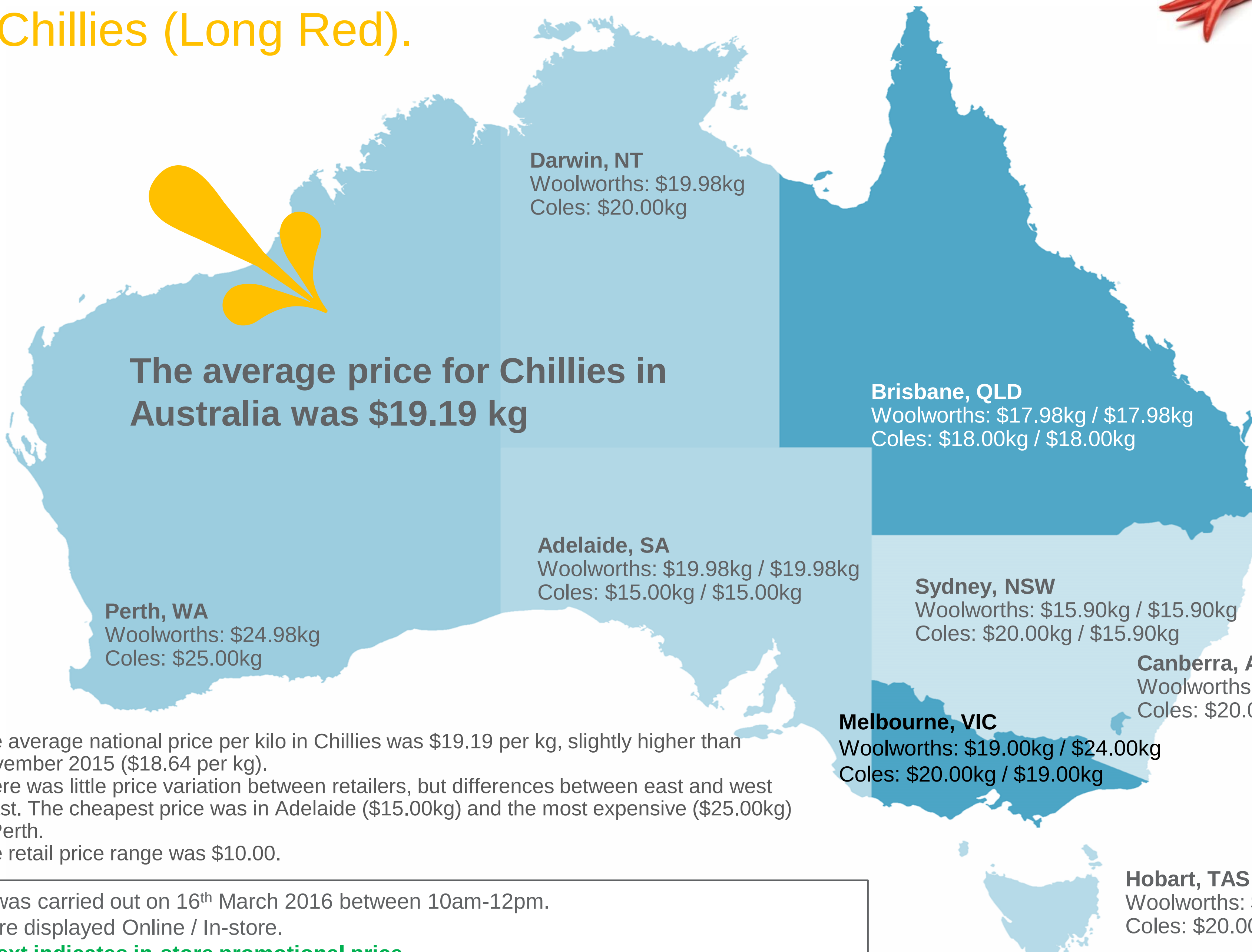
Individual chillies are the main format purchased, followed by pre-packaged small trays.



Q4b In what fresh formats do you typically purchase Chillies?
Sample Wave 26 N=201, Wave 30 N=204, Wave 34 N=202

Online and In-store Commodity Prices.

Chillies (Long Red).

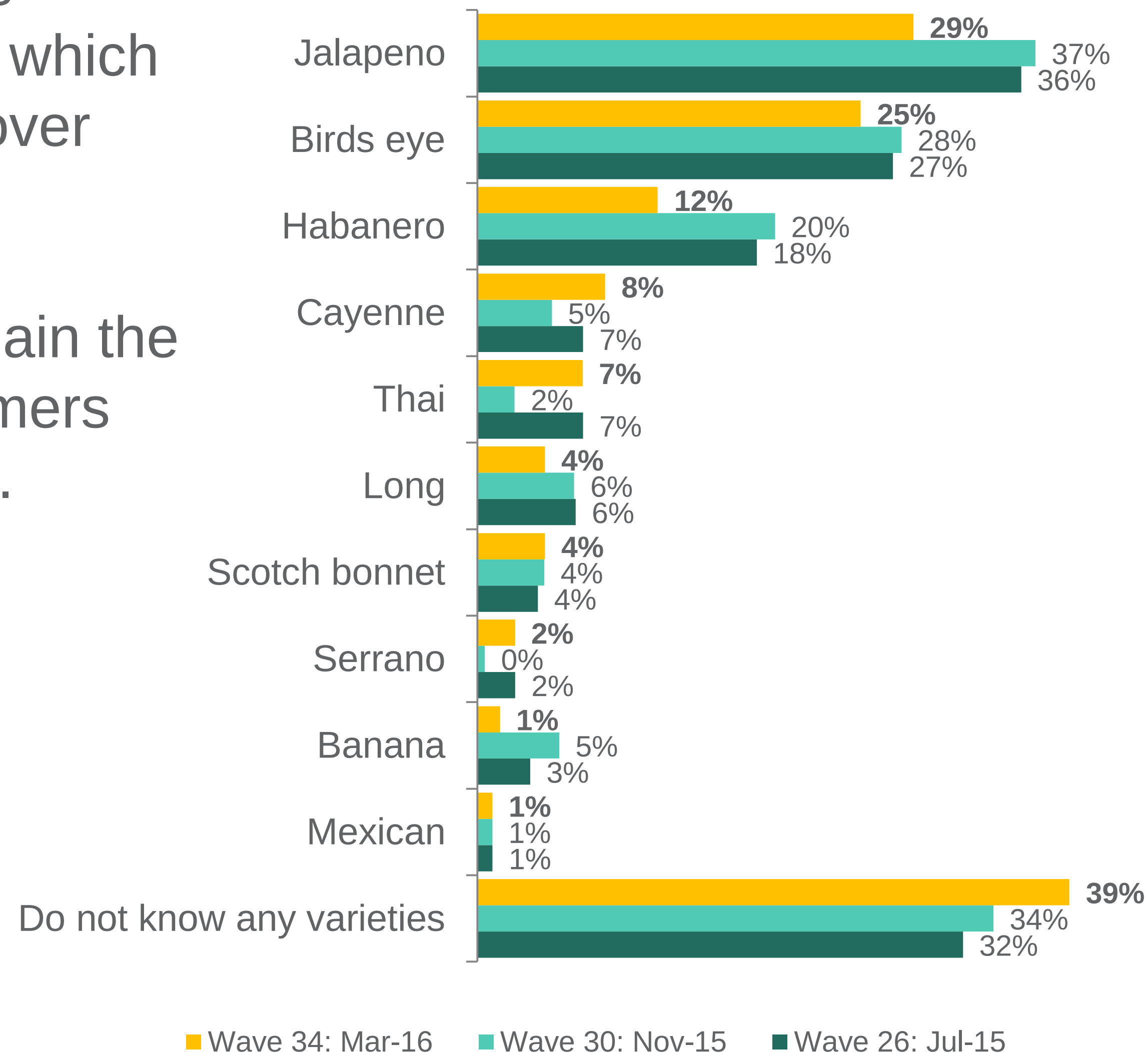


- The average national price per kilo in Chillies was $19.19 per kg, slightly higher than November 2015 ($18.64 per kg).
- There was little price variation between retailers, but differences between east and west coast. The cheapest price was in Adelaide ($15.00kg) and the most expensive ($25.00kg) in Perth.
- The retail price range was $10.00.

Pricing was carried out on 16th March 2016 between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates in-store promotional price.

Over one third of consumers cannot recall a type of chilli, which has consistently increased over the last three waves.

Jalapeno and Birds eye remain the most recalled types. Consumers are also prompted by colour.

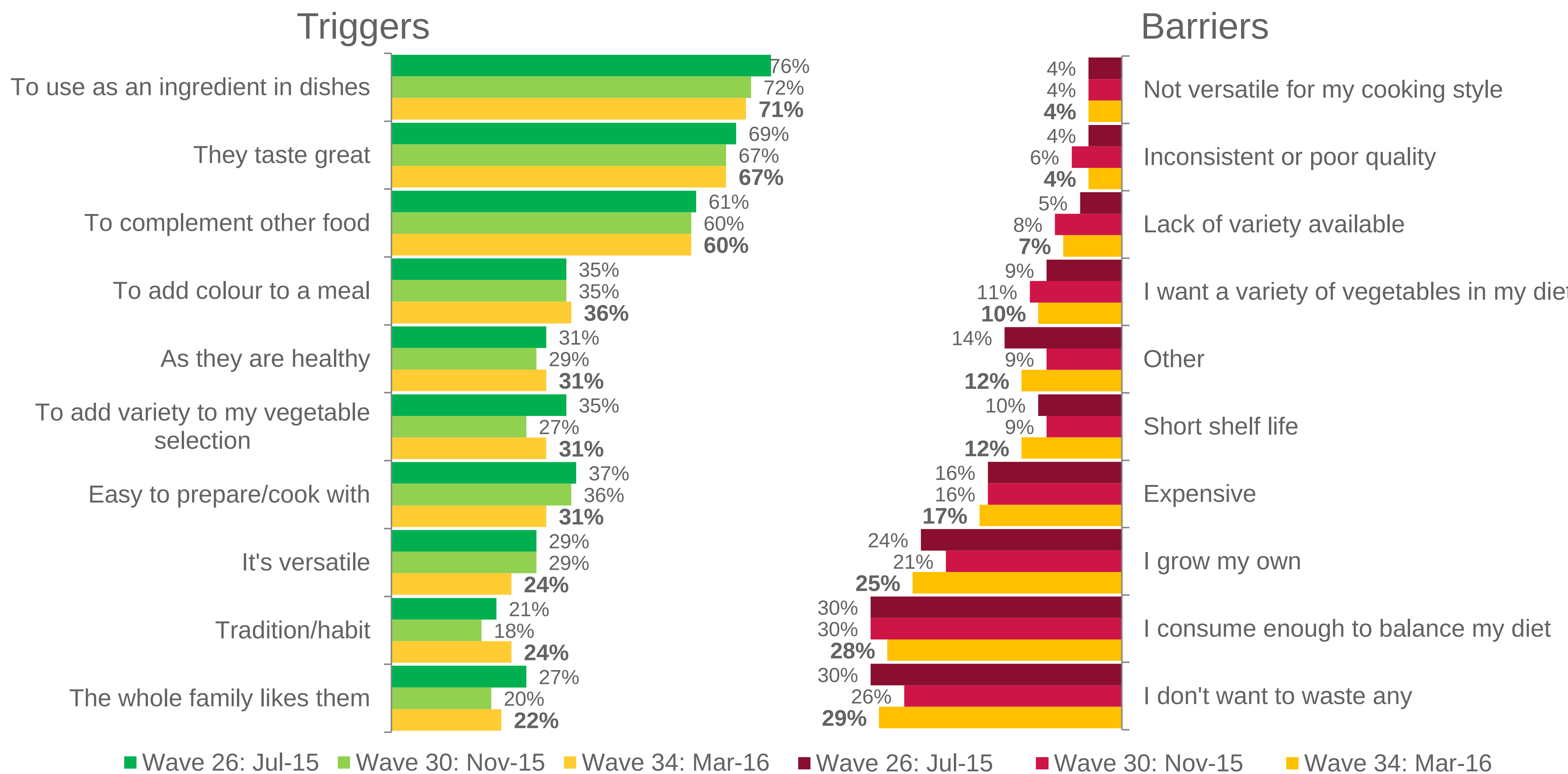


Red 22% **Green 22%** **Yellow 3%**

Chilli colour recall

Q6a. What types/varieties of <commodity> are you aware of? (unprompted)
Sample Wave 26 N=201, Wave 30 N=204, Wave 34 N=202

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



Q7. Which of the following reasons best describes why you purchase <commodity> ?
Q8. Which reason best describes why you don't buy <commodity> more often?
Sample Wave 26 N=201, Wave 30 N=204, Wave 34 N=202

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

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

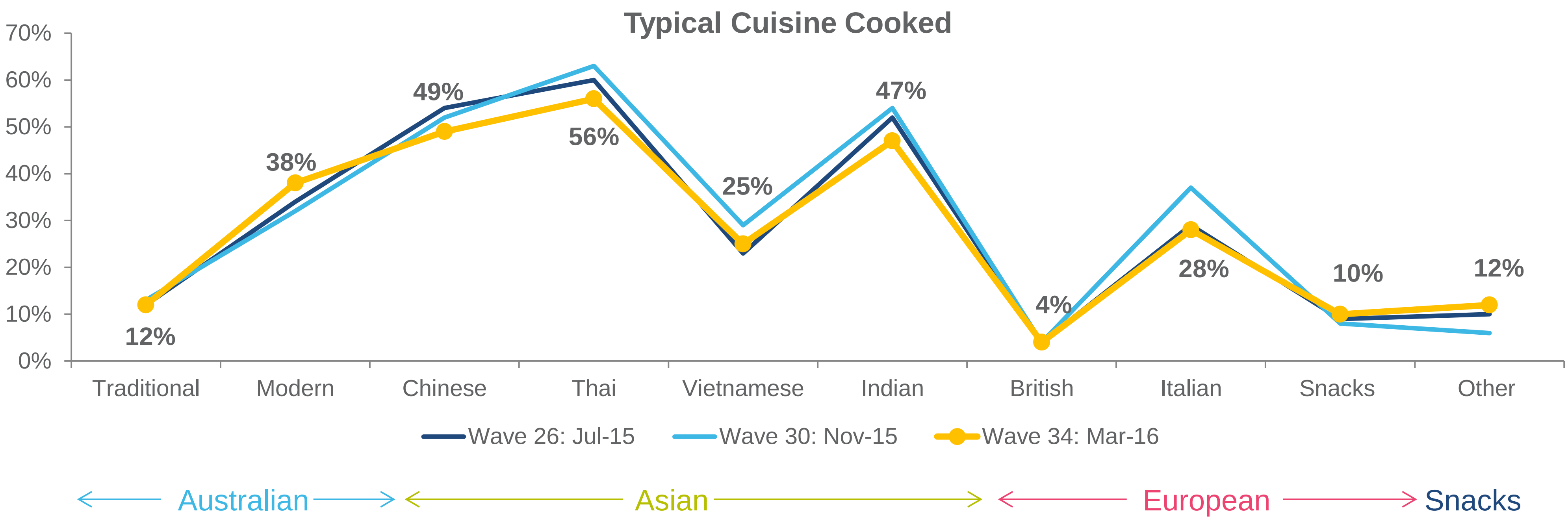
Top 5 Consumption Occasions

	Wave 30	Wave 34
Dinner	76%	**74%**
Family Meals	63%	**59%**
Weekday Meals	53%	**51%**
Weekend Meals	51%	**51%**
Quick Meals	48%	**44%**

31% used chillies when cooking a new recipe

▲ 42%, Wave 26

▲ 41%, Wave 30



Q10. What cuisines do you cook/consume that use <commodity> ?
Q11. Which of the following occasions do you typically consume/use <commodity> ?
Sample Wave 26 N=201, Wave 30 N=204, Wave 34 N=202

Onions and tomatoes are the main vegetables that are served with chillies. Consumers prefer to stir-fry chillies. There has been a consistent decline of soups as a cooking style over the last three waves.

Accompanying Vegetables

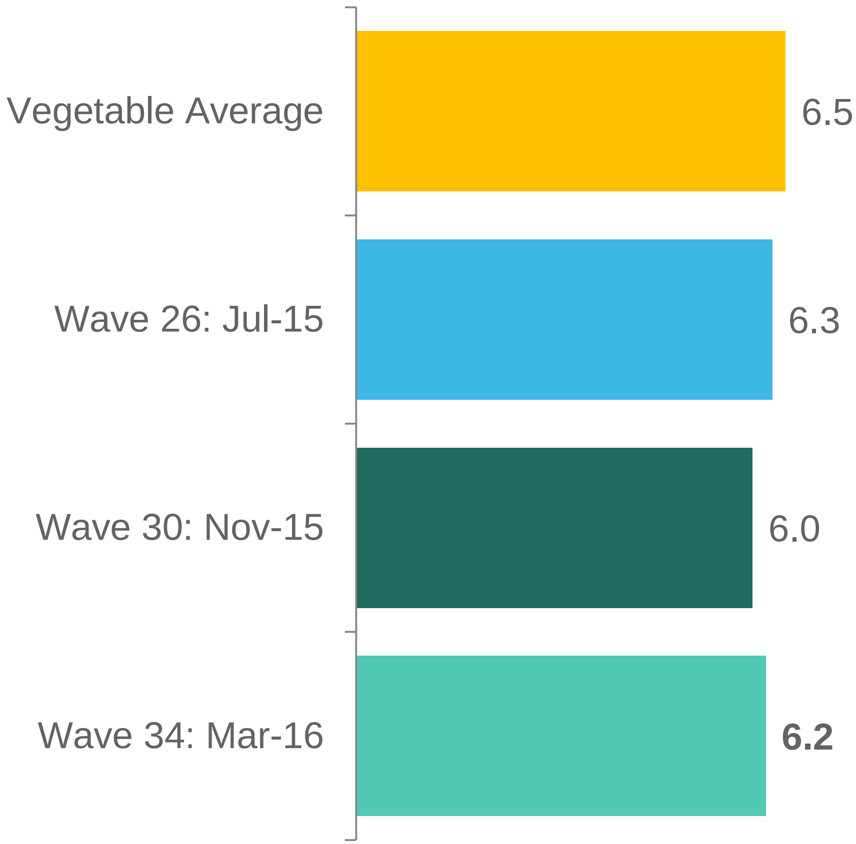
Onion	57% ▼
Tomato	54% ▲
Capsicum	48% ▼
Garlic	46% ▼
Carrot	39% ▼

Top 10 Cooking Styles

	Wave 26	Wave 30	Wave 34
Stir frying	74%	76%	**78%**
Frying	44%	45%	**40%**
Raw	31%	27%	**32%**
Sautéing	33%	30%	**30%**
Slow Cooking	38%	32%	**29%**
Roasting	23%	19%	**25%**
Soup	36%	28%	**22%**
Grilling	11%	16%	**17%**
Steaming	7%	5%	**9%**
Baking	14%	14%	**8%**

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 26 N=201, Wave 30 N=204, Wave 34 N=202

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



7.3

Q14. When purchasing <commodity>, how important is Provenance to you?
Q15. And when purchasing Chillies, how important is that it is grown in Australia?
Sample Wave 26 N=201, Wave 30 N=204, Wave 34 N=202

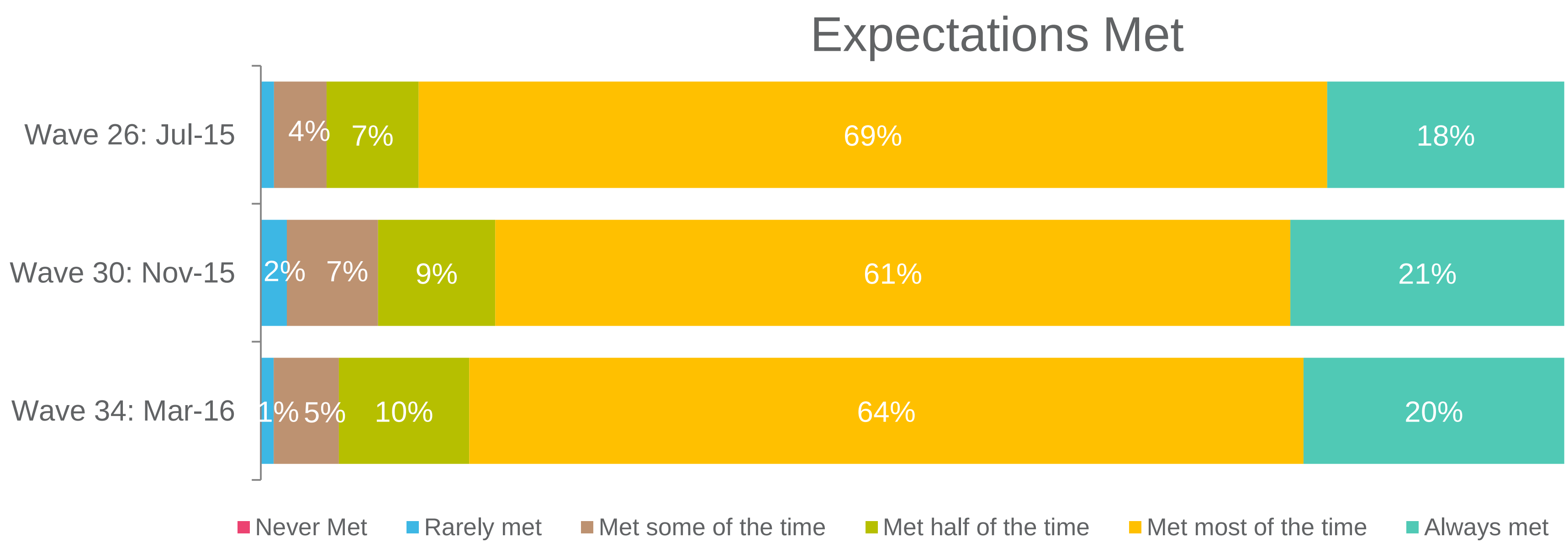
Freshness expectations have remained stable this month with over one fifth of consumers stating that their expectations were always met.

The expected shelf life of chillies has improved this wave to approximately 11 days.

Expected to stay fresh for **11.2** days

▼ 10.9 days, Wave 26

▼ 10.4 days, Wave 30



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 26 N=201, Wave 30 N=204, Wave 34 N=202

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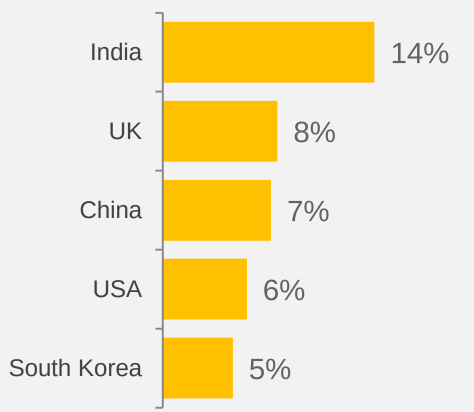
Chillies Product Launch Trends.

Chilli Global Launches

January – March 2016

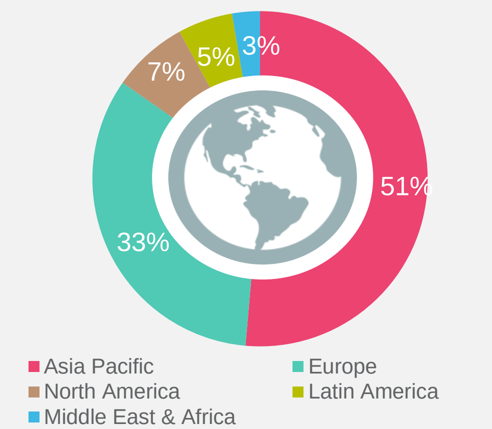
There were 3439 new products launched in the last 3 months that contained chilli as an ingredient, noticeably higher than the previous wave (2800). The majority of these launches were in the Asia Pacific and Europe. The top product launches categories were sauces & seasonings and snacks.

Country

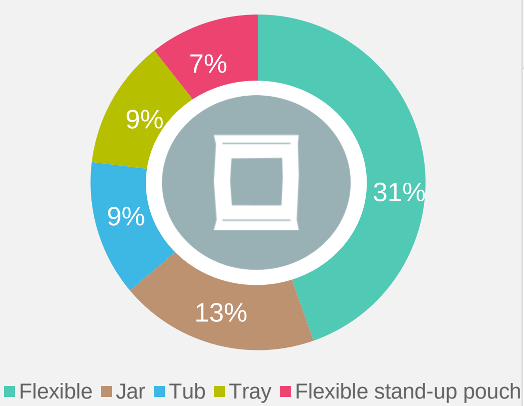


3439 Global NPDs

Region



Top Pack Formats



Categories

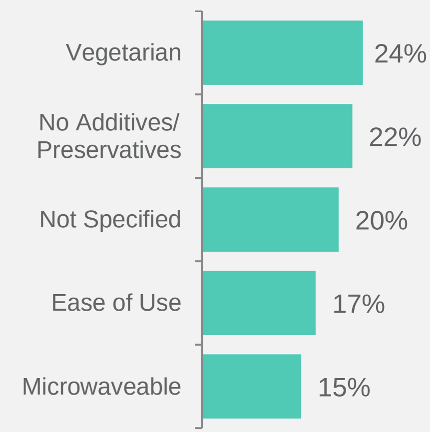
Sauces & Seasoning 32%

Snacks 25%

Meals 20%

Processed Products 10%

Top Claims

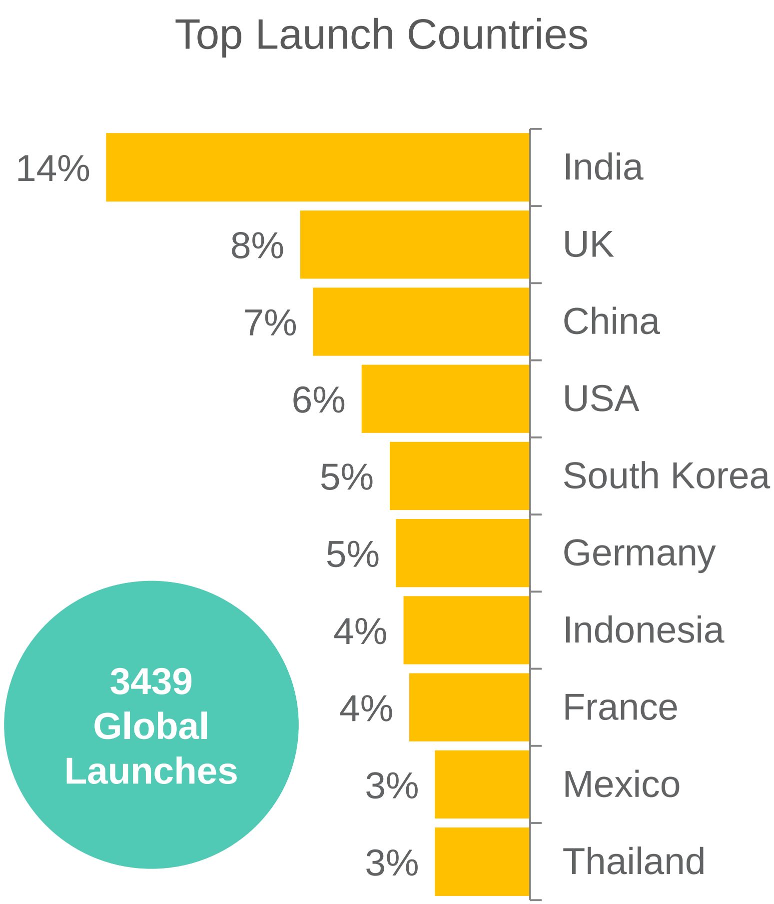


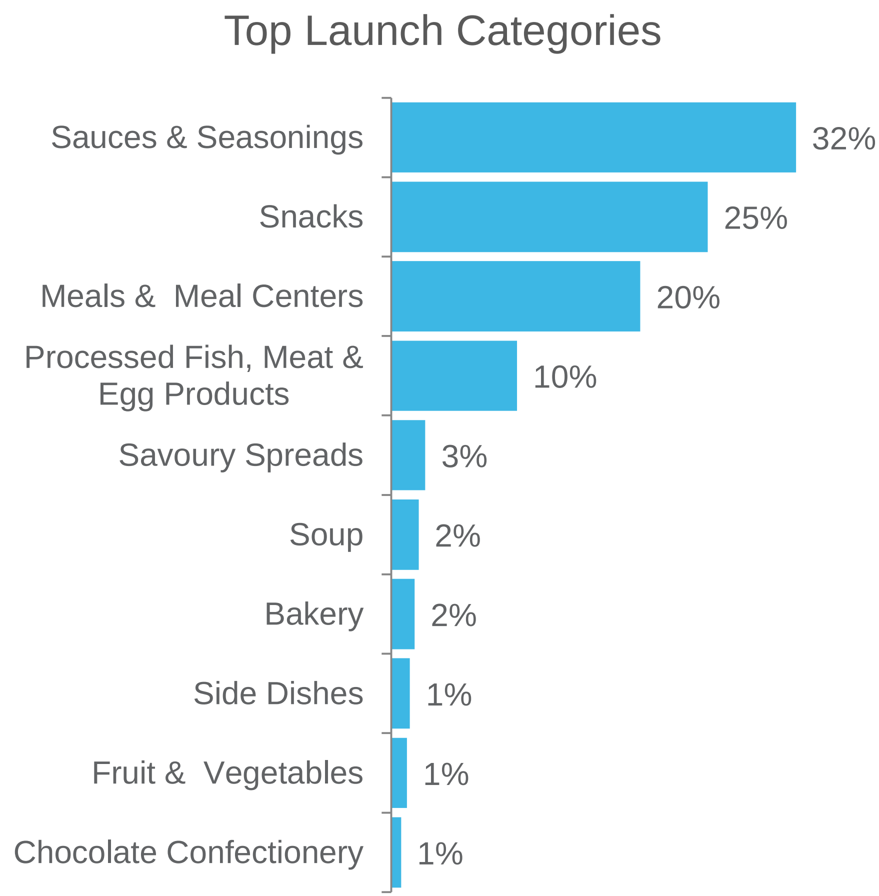
Chilli Product Launches:
Last 3 Months (January – March 2016)
Summary

- A total of 3439 products that contained chilli as an ingredient have been launched globally in the last 3 months.
- There were 60 chilli products launched in Australia – slightly lower than the previous wave.
- The two main regions for launches are Asia Pacific (51%) and Europe (33%).
- Flexible packaging (31%) and jars (13%) remained the main formats used for chilli launches.
- Top categories for launches are sauces and seasoning (32%) and snacks (25%).
- The key claims used are vegetarian (24%) and no additives/preservatives (22%).
- The most innovative products are Sushi Chilli Mayonnaise from Norway, and Jalapeño Chilli Ketchup from Sweden (see upcoming slides for more details).

Source: Mintel (2016)

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





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Vegetarian is the key claim used on products containing chilli. Flexible formats are the main type of packaging used, consistent with the previous wave.

Pack Formats Used

Global	Flexible	31%
	Jar	13%
	Tub	9%
Asia Pacific	Flexible	38%
	Jar	13%
	Flexible Stand-Up Pouch	9%
Europe	Flexible	23%
	Tray	18%
	Jar	14%

Top Claims Used

Global	Vegetarian	24%
	No Additives/Preservatives	22%
	Ease of Use	17%
Asia Pacific	Vegetarian	32%
	No Additives/Preservatives	23%
	Halal	20%
Europe	Ethical - Environmentally Friendly Package	21%
	Microwaveable	20%
	Vegetarian	19%

Only shown regions > 30 products launched

Innovative Chilli Launches:
L3M (January – March 2016)

Santa Maria Chilli Flavoured Tortilla Chips (Denmark)

Santa Maria Chilli Flavoured Tortilla Chips are available featuring a new improved recipe. The Tex Mex chips are made with sunflower oil, baked over an open flame and can be eaten with a dip. The crispy product is suitable for vegetarians and retails in a 185g pack.

Claims:
Vegetarian

ShellPride Baked Salmon with Chipotle and Honey (Mexico)

ShellPride Salmón Horneado al Chipotle con Miel (Baked Salmon with Chipotle and Honey) is handmade with a touch of fine spices to highlight its unique taste and texture. The cooked, boneless and ready to eat product is microwaveable and retails in a 200g pack.

Claims:
Microwaveable, Ease of Use

Göteborgs Utvalda Crostini with Rye and a Pinch of Chilli (Sweden)

Göteborgs Utvalda Crostini med Råg & en Nypa Chili (Crostini with Rye and a Pinch of Chilli) is said to be for Swedish tastes and suitable for simple starter dishes, as a side to salads and soups, or for luxurious snacks. The product is baked with olive oil using the high quality and carefully selected ingredients, and retails in a 100g pack, featuring recipe suggestions.

Claims:
NA

The Co-operative Loved by Us Cook in 30 Mins Piri Piri Chicken (UK)

The Co-operative Loved by Us Cook in 30 Mins Piri Piri Chicken has been relaunched with a new brand name and packaging. The product comprises piri piri marinated chicken breasts with peppers, onions and slices of corn on the cob with a sachet of spicy piri piri sauce. It is said to be perfect with a side of crispy fries, a green salad and creamy coleslaw.

Claims:
Ethical - Environmentally Friendly Package

Source: Mintel (2016)

Innovative Chilli Launches:
L3M (January – March 2016)

Liang Pin Pu Zi / Bestore Spicy Flavoured Stewed Iron Egg (China)

Liang Pin Pu Zi / Bestore Xiang La Wei Xiang Lu Tie Dan (Spicy Flavoured Stewed Iron Egg) contains high protein. This tasty product retails in a 128g economy pack containing individual units and featuring a QR code.

Claims:
Economy, High Protein

Dang Spicy Chili & Lime Flavored Toasted Coconut Chips (USA)

Dang Spicy Chili & Lime Flavored Toasted Coconut Chips have been repackaged with a new design. The crispy snack is said to have a tart, zesty front note followed by a kick of heat and a sweet, nutty aftertaste. The vegan product is a good source of fiber and free from GMO, gluten, dairy and cholesterol.

Claims:
Low/No/Reduced Cholesterol, High/Added Fiber, Gluten-Free, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Product, Ethical - Human, Vegan, No Animal Ingredients, GMO-Free, Social Media

Putri Bali Sweet Spicy Balinese Peanuts (Indonesia)

Putri Bali Kacang Kapri Bumbu Bali Rasa Pedas Manis (Sweet Spicy Balinese Peanuts) are now available. This product is halal certified.

Claims:
Halal

Heinz Jalapeño Chilli Ketchup (Sweden)

Heinz Tomato Ketchup med Jalapeno (Jalapeño Chilli Ketchup) is now available. The product retails in a 250g pack.

Claims:
N/A

Source: Mintel (2016)

Innovative Chilli Launches:
L3M (January – March 2016)

Marketside Parmesan and Garlic Sauce'n Toss Wing Sauce (USA)

Marketside Parmesan and Garlic Sauce'n Toss Wing Sauce is described as a classic blend of bold aged parmesan cheese flavor in a creamy vinaigrette, and balanced with savory mustard and hot chili peppers. The product retails in a 4-lb. 4-oz. pack.

Claims:
N/A

Sanghavi's Red Chilli Rice Papad (India)

Sanghavi's Red Chilli Rice Papad is microwaveable and suitable for vegetarians. The crunchy product retails in a 250g pack.

Claims:
Microwaveable, Vegetarian

Lofoten Sushi Chili Mayonnaise (Norway)

Lofoten Sushi Chili Majones (Chili Mayonnaise) is now available on the market. This product retails in a 90g pack.

Claims:
N/A

Kronfågel Fried and Sliced Chicken Fillet with Caesar Taste (Sweden)

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

Claims:
Ease of Use

Source: Mintel (2016)

Australian Chilli Launches:
L3M (January – March 2016)

Andersen Cacao Creations Raw Organic Chocolate Bark with Rose Petal, Mango and Goji Berry

Saxa Natural Red Chilli and Salt Blend

Nando's Lemon & Herb Mild Peri-Peri Rub

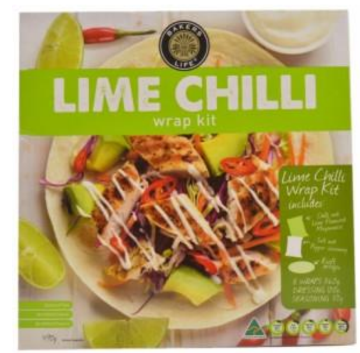
Woolworths Created With Jamie Spicy Asian-Style Salmon

Moser Roth Finest Dark Chocolate with Chilli

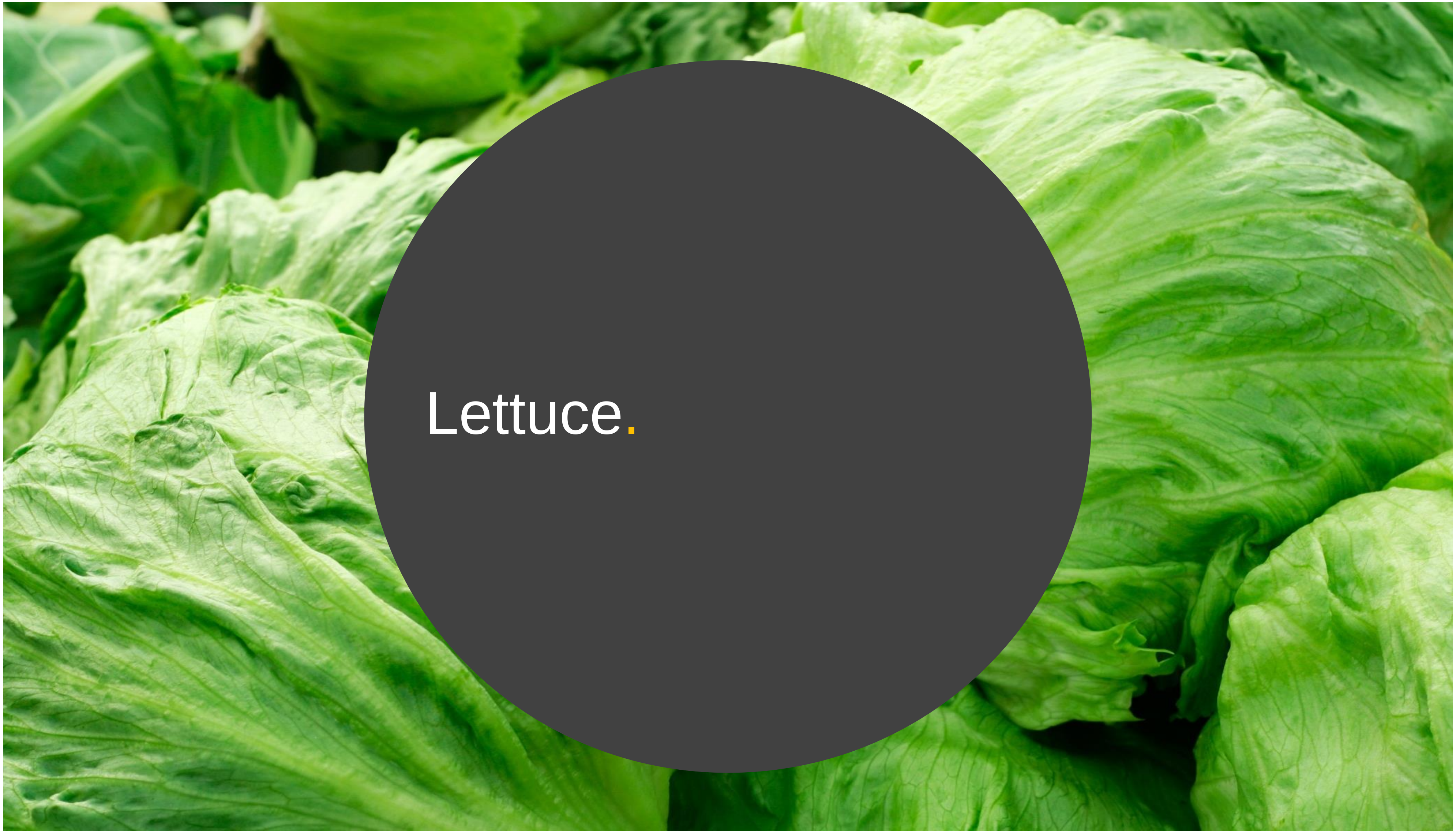
Freedom Farms Portuguese Butterflied Chicken

Deli Originals Prawn & Mango Dip

Bakers Life Lime Chilli Wrap Kit



Source: Mintel (2016)



Lettuce.

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

Mainstream retailers remain the primary channel of purchase for consumers, however there has been a noticeable decline in purchase from Woolworths this wave.

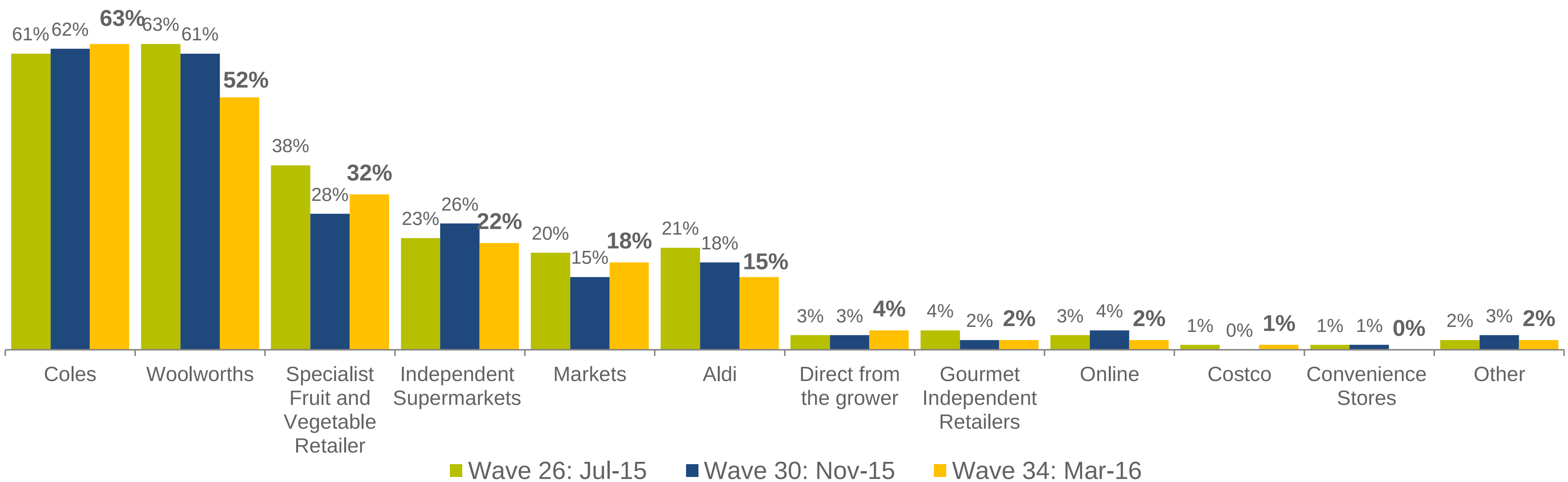
Average Purchase **4.1** times per month

▲ 4.2 times, Wave 26
▲ 4.4 times, Wave 30

Average Consumption **13.9** times per month

▼ 13.1 times, Wave 26
▲ 14.7 times, Wave 30

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 26 N=312, Wave 30 N=304, Wave 34 N=304

Horticulture Innovation Australia

colmar brunton.

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

Average Spend and Price Sensitivity.

Average weight of purchase

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

— 700g, Wave 26
— 700g, Wave 30

Recalled last spend

Recalled spend on lettuce was **$2.70**, remaining consistent with the last wave.

▲ $2.90, Wave 26
— $2.70, Wave 30

Value for money

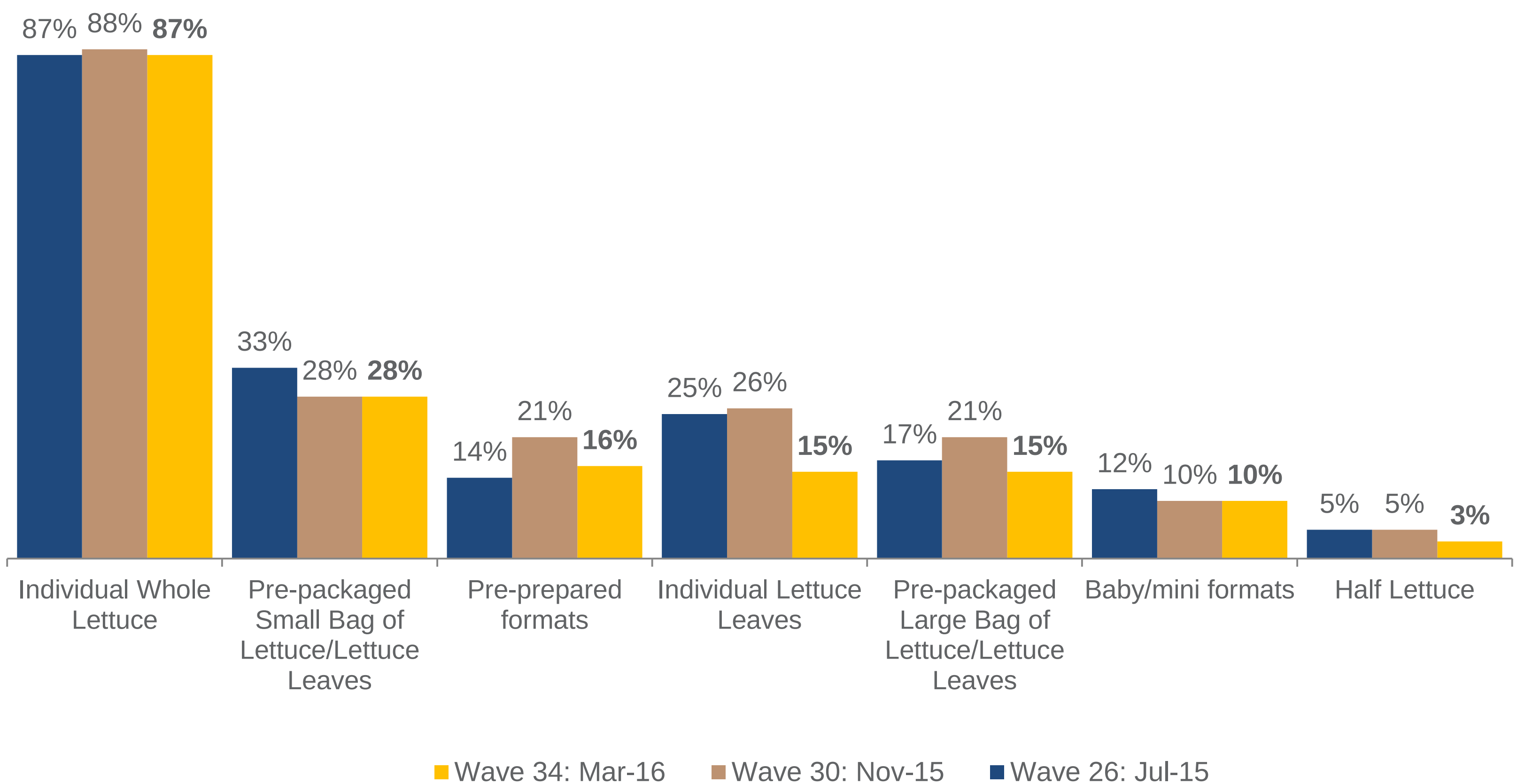
Consumers' perceived value for money is good **(6.6/10)**, which is higher than the previous two waves.

▼ 6.4/10, Wave 26
▼ 6.3/10, Wave 30

Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? 0-10 scale
Sample Wave 26 N=312, Wave 30 N=304, Wave 34 N=304

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

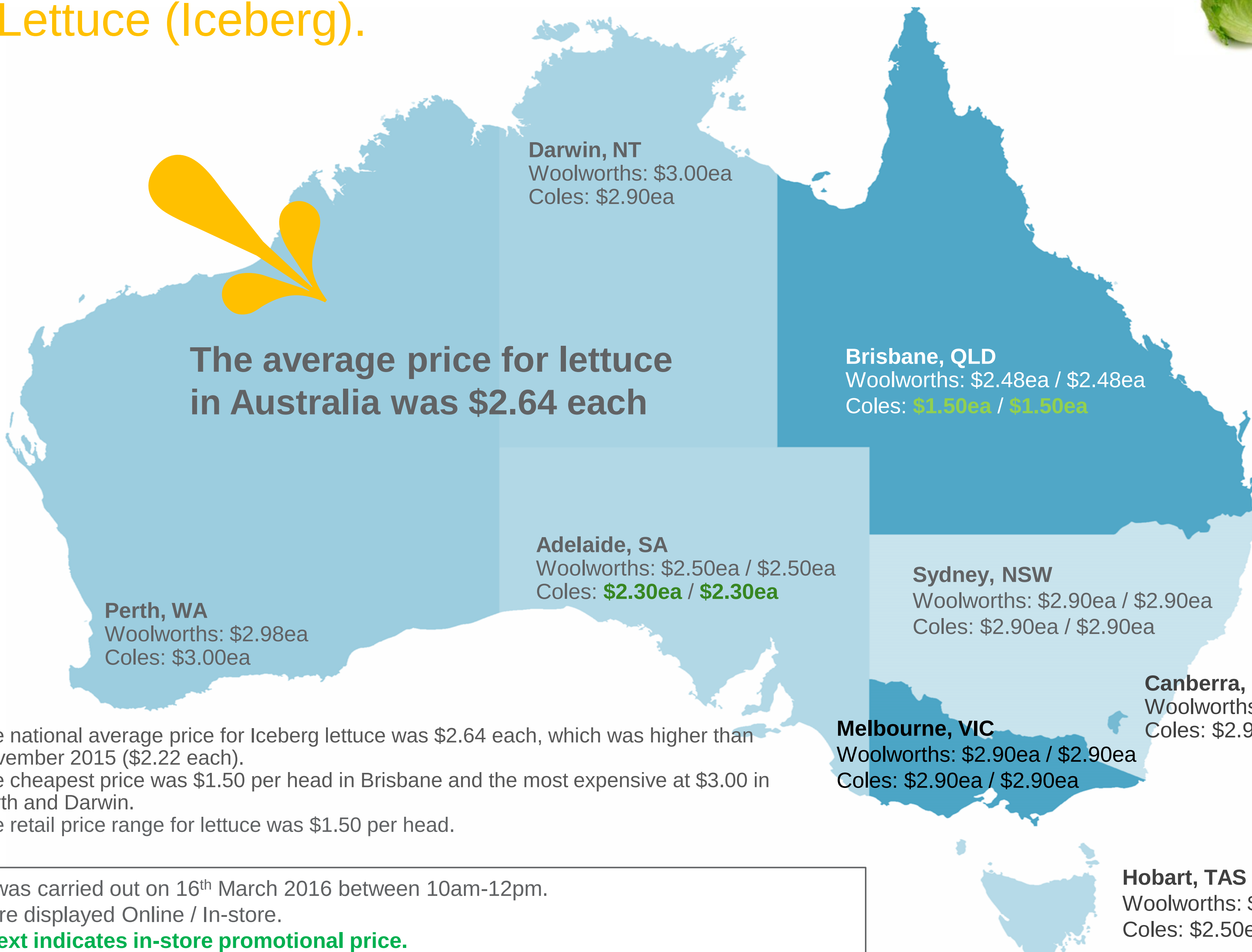
Individual lettuce heads are purchased by the majority of consumers. This wave sees a noticeable decline in purchases of pre-prepared formats and individual lettuce leaves.



Q4b In what fresh formats do you typically purchase Lettuce?
Sample Wave 26 N=312, Wave 30 N=304, Wave 34 N=304

Online and In-store Commodity Prices.

Lettuce (Iceberg).

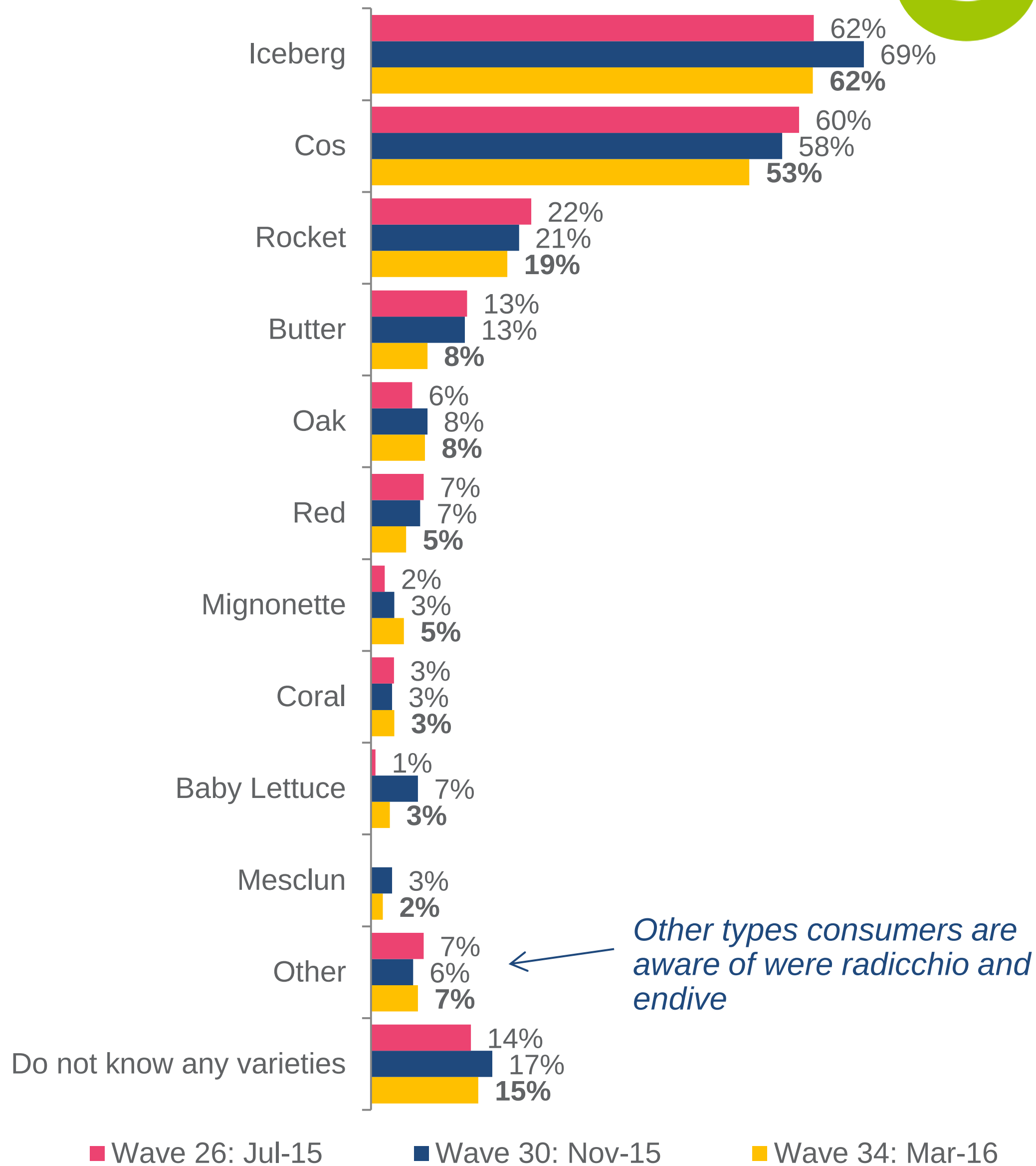


- The national average price for Iceberg lettuce was $2.64 each, which was higher than November 2015 ($2.22 each).
- The cheapest price was $1.50 per head in Brisbane and the most expensive at $3.00 in Perth and Darwin.
- The retail price range for lettuce was $1.50 per head.

Pricing was carried out on 16th March 2016 between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates in-store promotional price.

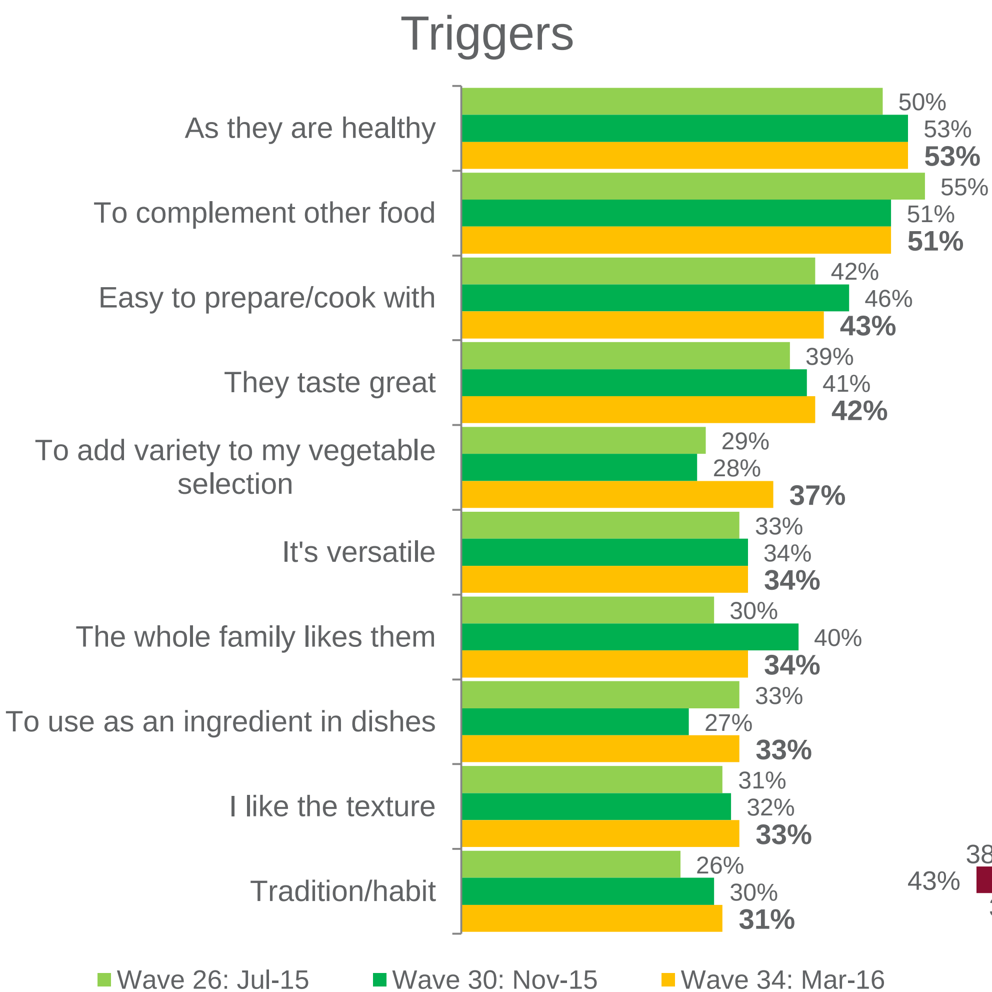
A large proportion of consumers are aware of different varieties of lettuce. Iceberg and Cos continue to have the greatest level of recall.

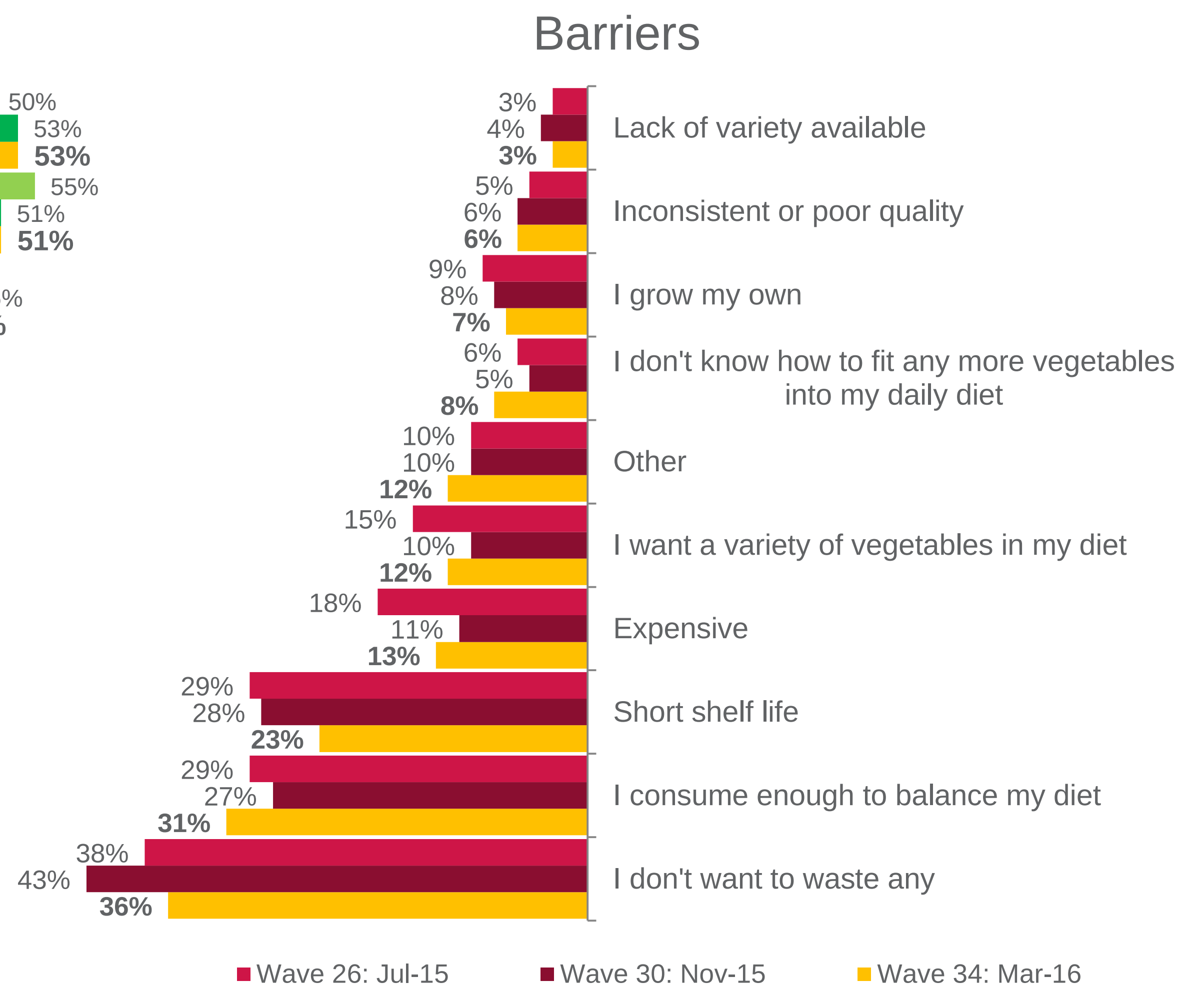
Several lettuce types recalled are not actually lettuce, although consumers perceive them to be, such as rocket, endive and radicchio.



Q6a. What types/varieties of <commodity> are you aware of? (unprompted)
Sample Wave 26 N=312, Wave 30 N=304, Wave 34 N=304

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





Q7. Which of the following reasons best describes why you purchase <commodity> ?
Q8. Which reason best describes why you don't buy <commodity> more often?
Sample Wave 26 N=312, Wave 30 N=304, Wave 34 N=304

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

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

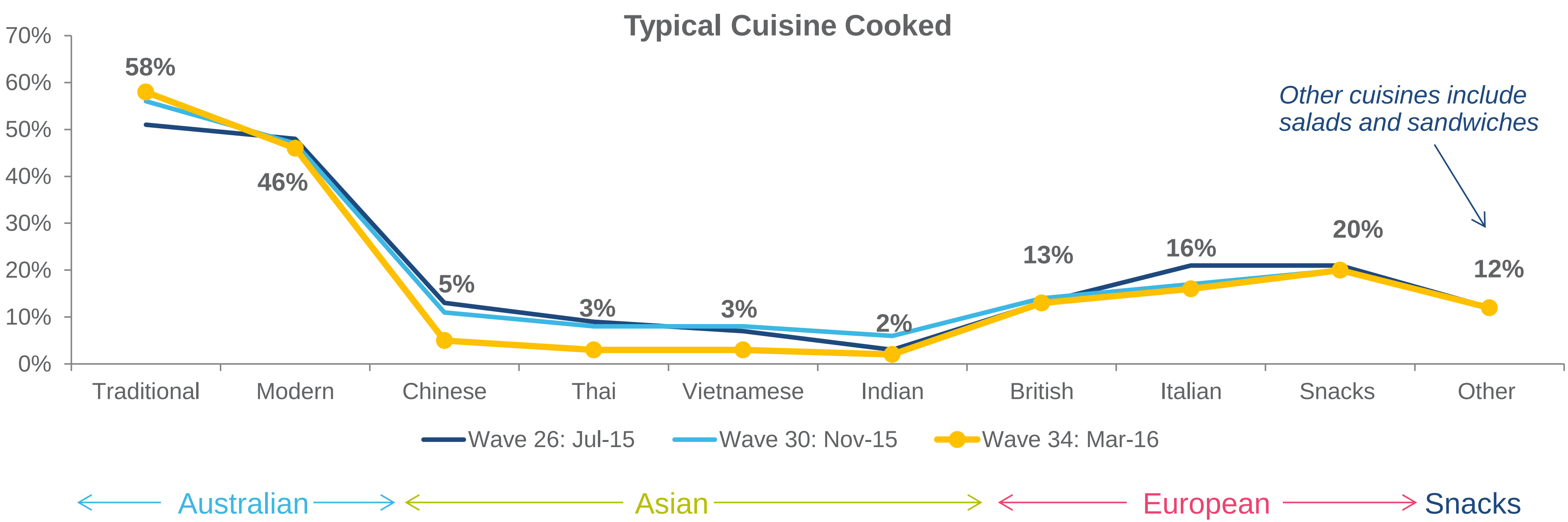
Top 5 Consumption Occasions

	Wave 30	Wave 34
Lunch	64%	**67%**
Dinner	61%	**67%**
Family Meals	53%	**49%**
Weekend Meals	42%	**49%**
Weekday Meals	41%	**48%**

6% used lettuce when cooking a new recipe

▲ 11%, Wave 26

▲ 9%, Wave 30



Q10. What cuisines do you cook/consume that use <commodity> ?
Q11. Which of the following occasions do you typically consume/use <commodity> ?
Sample Wave 26 N=312, Wave 30 N=304, Wave 34 N=304

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

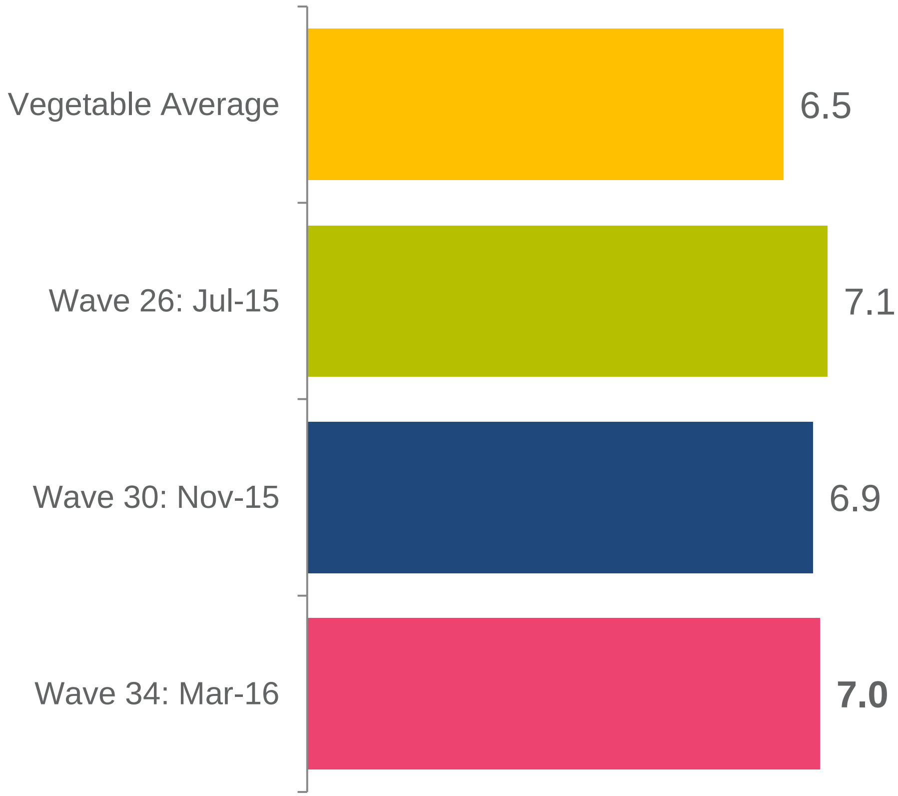
The majority of lettuce is eaten raw and served with tomatoes, capsicum and cucumber.

Accompanying Vegetables	
Tomato	87%
Capsicum	54%
Cucumber	52%
Carrot	51%
Onion	42%

Top 10 Cooking Styles			
	Wave 26	Wave 30	Wave 34
Raw	81%	80%	**76%**
Other	13%	17%	**21%**
Stir frying	7%	6%	**3%**
Soup	4%	3%	**2%**
Grilling	0%	1%	**1%**
Steaming	3%	2%	**1%**
Slow Cooking	1%	1%	**1%**
Baking	0%	1%	**1%**
Sautéing	3%	1%	**1%**
Microwave	0%	1%	**0%**

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 26 N=312, Wave 30 N=304, Wave 34 N=304

Lettuce provenance is slightly higher this wave. Knowing that lettuce is grown in Australia remains highly important information for consumers.



8.4

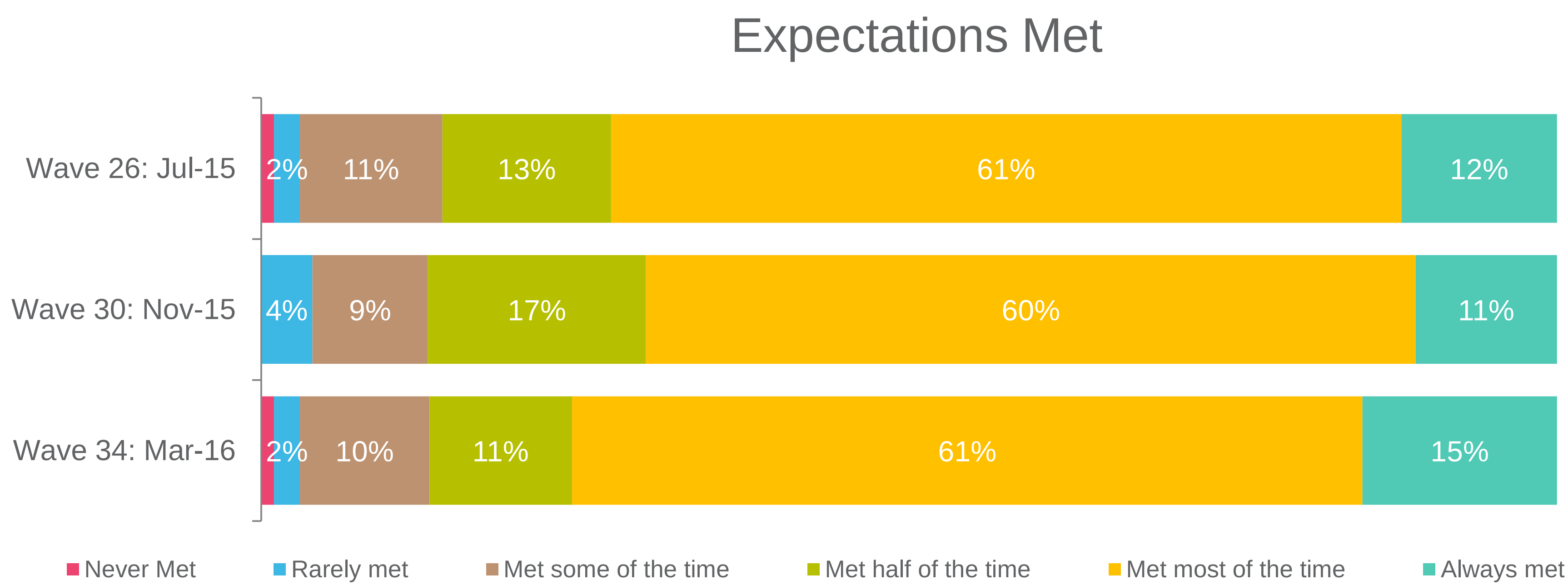
Q14. When purchasing <commodity>, how important is Provenance to you?
Q15. And when purchasing Lettuce, how important is that it is grown in Australia?
Sample Wave 26 N=312, Wave 30 N=304, Wave 34 N=304

Expected shelf-life has increased this wave and is expected to last for around 8 days.

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

Expected to stay fresh for **8.4** days

▼ 7.7 days, Wave 26
▼ 7.7 days, Wave 30



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 26 N=312, Wave 30 N=304, Wave 34 N=304

Lettuce Product Launch Trends.

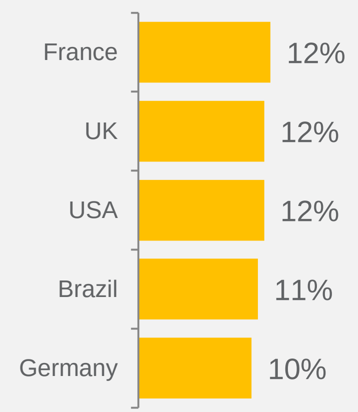
Lettuce Global Launches

January – March 2016

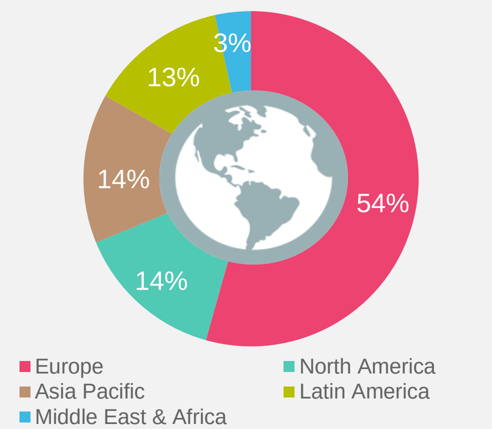
There were 173 products launched globally over the last three months that contained lettuce as an ingredient. The main regions for launches were Europe and North America. Product launches were primarily meals and fruit & vegetables.

173 Global NPDs

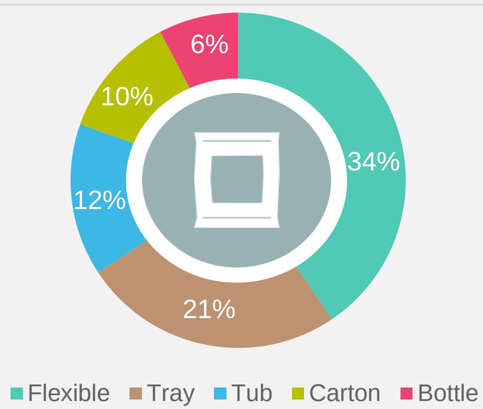
Country



Region



Top Pack Formats



Categories

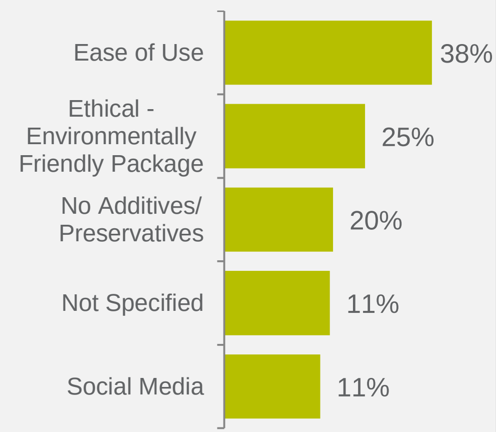
Meals 46%

Fruit & Vegetables 35%

Juice Drinks 12%

Savoury Spreads 2%

Top Claims



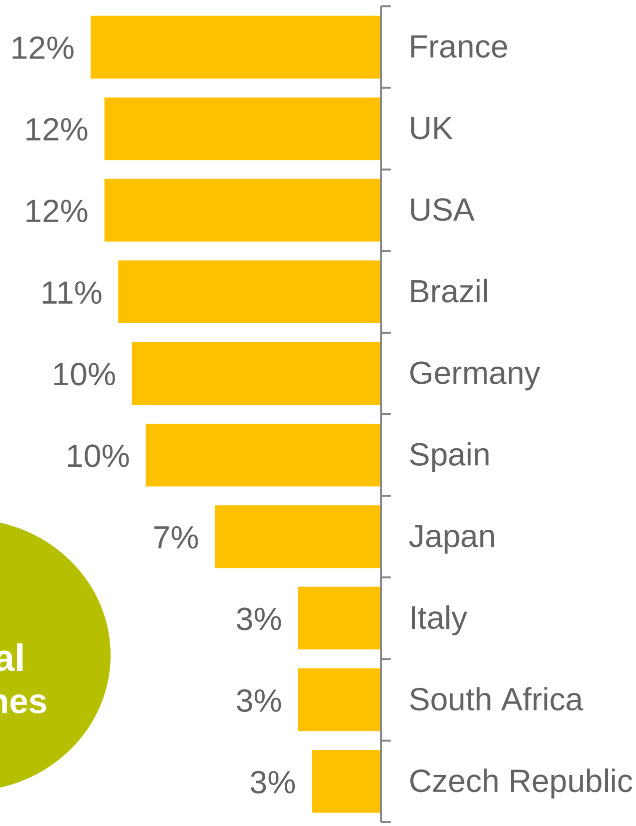
Lettuce Product Launches:
Last 3 Months (January – March 2016)
Summary

- Globally, there were 173 products launched, relatively consistent with the previous wave.
- There were no products containing lettuce as an ingredient launched in Australia over the last 3 months.
- The majority of products were launched in Europe (54%) and North America (14%).
- Flexible formats (34%) and trays (21%) were the main packaging formats used.
- The top categories for launches were meals (46%), fruit and vegetables (35%) and juice drinks (12%), which was consistent with previous trends.
- The key claims used over the past three months were ease of use (38%), environmentally friendly packaging (25%) and no additives and preservatives (20%).
- The most innovative launch found was a Organic Shampoo from Japan. Examples can be found over the next slides.

Source: Mintel (2016)

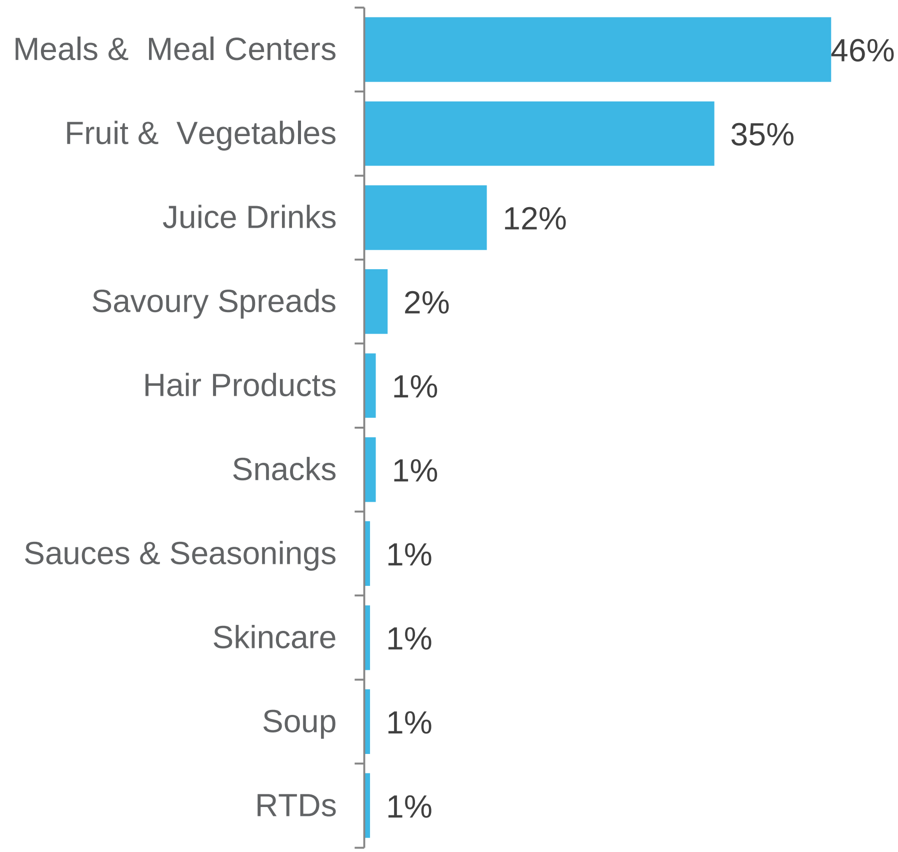
The main countries for products launched were France, UK and USA. Consistent with previous trends, launches were in meals, fruit and vegetables and juice categories.

Top Launch Countries



173 Global Launches

Top Launch Categories



Horticulture Innovation Australia

colmar brunton.

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

Pack Formats Used

Global	Flexible	34%
	Tray	21%
	Tub	12%
Europe	Flexible	43%
	Tray	23%
	Tub	14%

Top Claims Used

Global	Ease of Use	38%
	Ethical - Environmentally Friendly Package	25%
	No Additives/Preservatives	20%
Europe	Ease of Use	46%
	Ethical - Environmentally Friendly Package	28%
	Social Media	19%

Only regions with n >30 are displayed

Innovative Lettuce Launches:
L3M (January – March 2016)

Ready Pac Bistro Bowl Sesame Miso Chopped Salad (USA)

Ready Pac Bistro Bowl Sesame Miso Chopped Salad comprises crunchy Napa cabbage, Romaine lettuce, celery, carrots and red cabbage topped with white meat chicken, fire-roasted edamame, almonds and sunflower seeds, crunchy Wonton strips and sesame ginger miso dressing. The US inspected product retails in a 6.5-oz. pack that includes a fork.

Claims:
Ease of Use

Renaissance Food Group Hamburger Fixin's (USA)

Renaissance Food Group Hamburger Fixin's have been repackaged. The product contains fresh green leaf lettuce, ripe red tomatoes, and zesty red onions described as a BBQ must have. This product saves time of cleaning and slicing vegetables and retails in a 9-oz. pack.

Claims:
Ease of Use

BluePrint Organic Dandelion Drive Raw Vegetable and Fruit Drink (USA)

BluePrint Organic Dandelion Drive Raw Vegetable and Fruit Drink comprises dandelion, romaine, cucumber, bell pepper, celery, red onion, lemon and sea salt. The low calorie, 100% juice beverage is made with cold-pressed juice which is never cooked, and it is a good source of calcium.

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

Ready Pac Foods Bistro Bacon Caesar Supreme Salad Kit with Grilled Chicken (USA)

Ready Pac Foods Bistro Bacon Caesar Supreme Salad Kit with Grilled Chicken comprises crisp romaine lettuce, microwavable grilled white meat chicken, grape tomatoes, shredded cheese, bacon with a classic Caesar dressing. This USDA inspected product provides 9g of protein per serving, and retails in a 15-oz. pack serving four.

Claims:
Microwaveable, Ease of Use

Source: Mintel (2016)

Innovative Lettuce Launches:
L3M (January – March 2016)

Kikka Chicken Spring Rolls (USA)

Kikka Chicken Spring Rolls are now available. The fine product retails in a 6-oz. pack with two rolls and peanut sauce.

Claims:
N/A

Bonduelle Le Selezioni Mini Green Lettuce (Italy)

Bonduelle Le Selezioni Lattughella (Mini Green Lettuce) has been added to the range. This product is described as tasty and crunchy, contains whole leaves of mini green lettuce, has been washed and is ready to use. It retails in a 100g pack containing 2 portions, and bearing the Facebook logo.

Claims:
N/A

Belaya Dacha Dlya Berezhlivyh Iceberg Lettuce (Russia)

Belaya Dacha Dlya Berezhlivyh Salat Aysberg (Iceberg Lettuce) is grown under a real sun, washed in spring water and ready to eat. This economy product retails in a 0.2kg pack.

Claims:
Economy, Ease of Use

Kikka Seasoned Squid Salad (USA)

Kikka Seasoned Squid Salad is now available. The fine product retails in a 3-oz. pack.

Claims:
N/A

Source: Mintel (2016)

Innovative Lettuce Launches:
L3M (January – March 2016)

Ateliê do Sabor Be Wrappy Tuna, Tortilla, Carrot, Lettuce and Seasoned Mayonnaise Wrap (Brazil)

Ateliê do Sabor Be Wrappy Wrap de Atum, Tortilha, Cenoura, Alface e Maionese Temperada (Tuna, Tortilla, Carrot, Lettuce and Seasoned Mayonnaise Wrap) is now available. The product retails in a 170g pack featuring a Facebook link.

Claims:
Social Media

Ready Pac Bistro Bowl Santa Fe Salad Caesar Salad (USA)

Ready Pac Bistro Bowl Santa Fe Salad Caesar Salad has been repackaged in newly designed a recycled 12.5-oz. pack containing two 6.25-oz. units and featuring the Facebook, Twitter and Pinterest logo, as well as a fork. The product comprise of crisp romaine lettuce, white meat chicken, fire roasted corn, Monterey Jack-Colby cheese topped with tortilla chips and a creamy salsa ranch dressing. The chicken used in this product are raised without antibiotics.

Claims:
Ethical - Environmentally Friendly Package, Ease of Use, Social Media

Bonduelle Salatlust Beetroot & Apple Salad Mix (Germany)

Bonduelle Salatlust Rote Bete - Apfel Salatmischung (Beetroot & Apple Salad Mix) is now available. This fresh salad mix comes with French dressing in a separate cup, red beets, apples, cherry tomatoes, and a sachet of Seeberger vital seed mix. The product is suitable for vegetarians and vegans and retails in a 230g pack featuring the Facebook logo and containing a fork.

Claims:
Vegetarian, Cobranded, Vegan, No Animal Ingredients, Social Media

Playback Organic Shampoo (Japan)

Playback Organic is a new haircare range featuring over 95% natural formula with 100 kinds of botanical ingredients including over 10% organic extracts to repair damaged hair from within, condition moisture balance in scalp and leave the hair moisturised, radiant and manageable. The products are not tested on animals, feature a botanical green fragrance and are free from BHT, silicone, mineral oil, synthetic fragrance and PEG.

Claims:
Organic, Refill/Refillable, Botanical/Herbal, Damaged Hair, Ethical - Animal, Brightening / Illuminating*, Moisturising / Hydrating, Silicone Free, Mineral Oil/Petroleum Free

Source: Mintel (2016)

Sweet Corn.

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

Purchase remains primarily through Coles and Woolworths. This month sees a slight downwards trend in markets and Aldi as popular purchase channels.

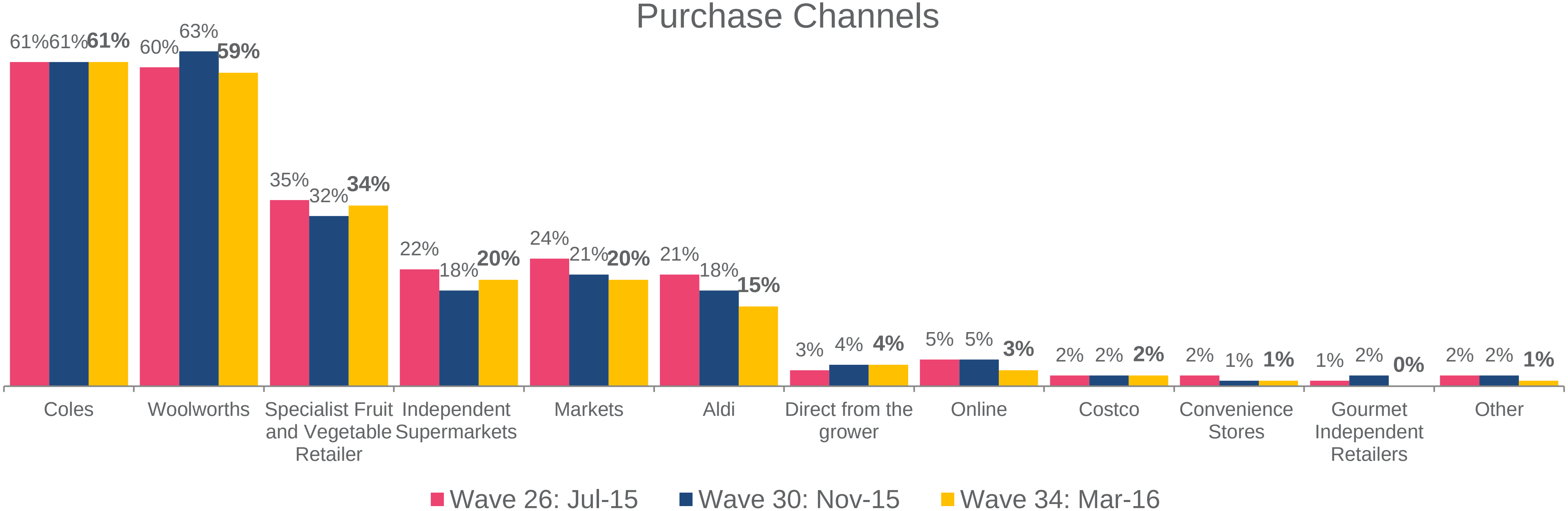
Average Purchase **3.6** times per month

▲ 3.8 times, Wave 26
▲ 4.0 times, Wave 30

Average Consumption **6.6** times per month

▲ 6.8 times, Wave 26
▼ 6.1 times, Wave 30

Purchase Channels



Q1. On average, how often do you purchase <commodity>?
Q2. On average, how often do you consume <commodity>?
Q5. From which of the following channels do you typically purchase <commodity>?
Sample Wave 26 N=304, Wave 30 N=302, Wave 34 N=310

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 **0.9kg** of sweet corn, which remains consistent with the previous wave.

▲ 1.1kg, Wave 26
— 0.9kg, Wave 30

Recalled last spend

Recalled last spend on sweet corn was **$3.30,** which has declined from prices recorded in the preceding two waves.

▲ $4.10, Wave 26
▲ $4.20, Wave 30

Value for money

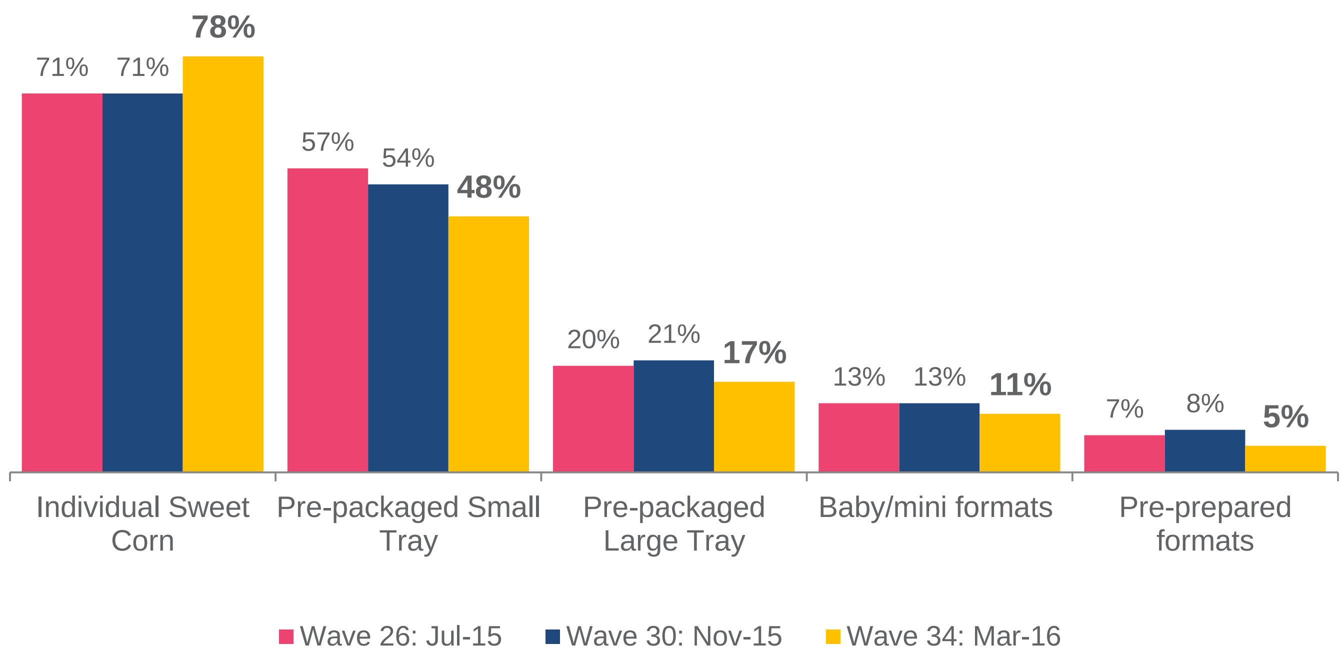
Consumers' perceived value for money was good **(6.9/10)**, which is slightly higher than the last wave.

▼ 6.7/10, Wave 26
▼ 6.6/10, Wave 30

Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is?
Sample Wave 26 N=304, Wave 30 N=302, Wave 34 N=310

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

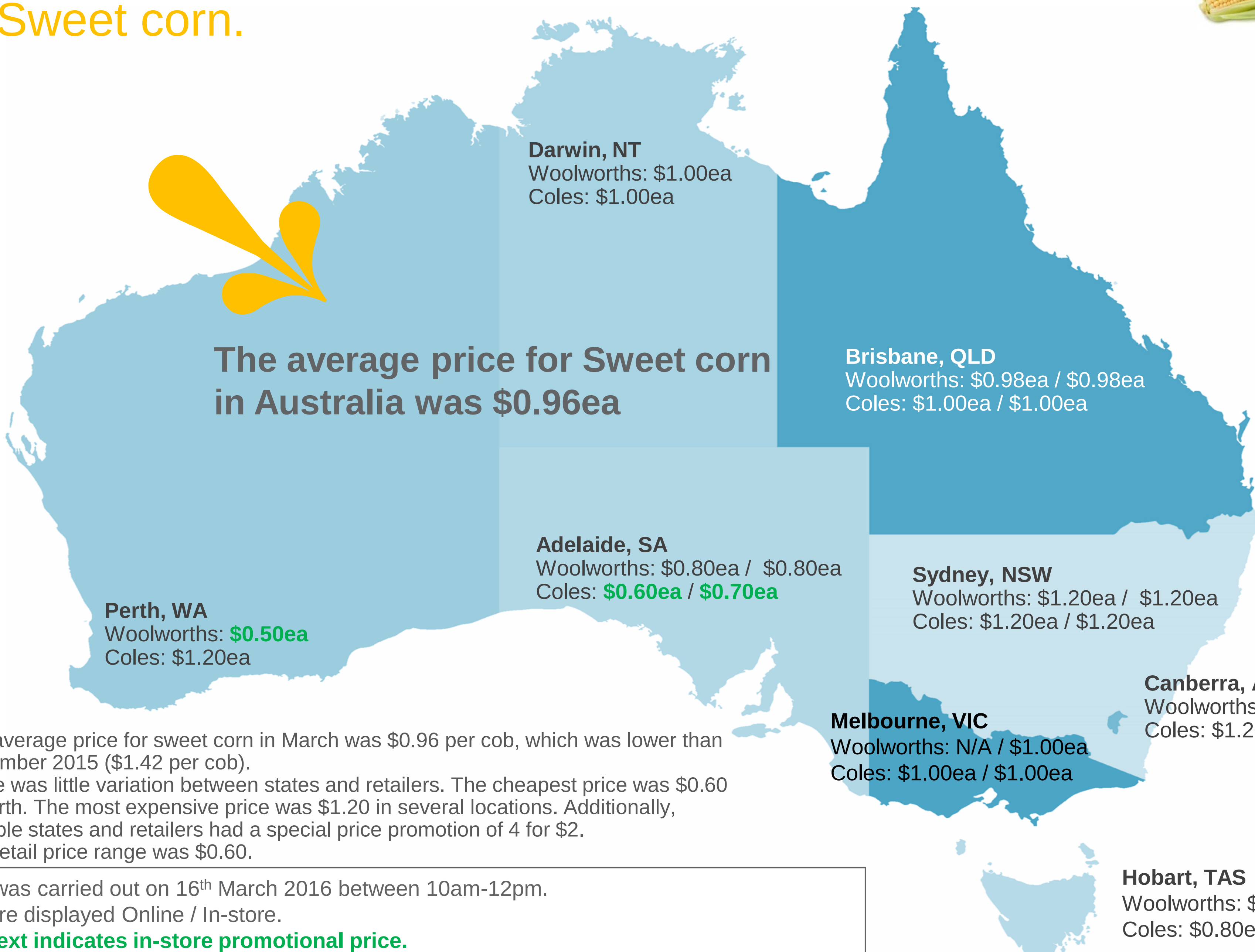
Individual cobs and small trays of corn remain the most common formats purchased. Pre-packaged large trays are also a relatively popular format.



Q4b In what fresh formats do you typically purchase Sweet Corn?
Sample Wave 26 N=304, Wave 30 N=302, Wave 34 N=310

Online and In-store Commodity Prices.

Sweet corn.

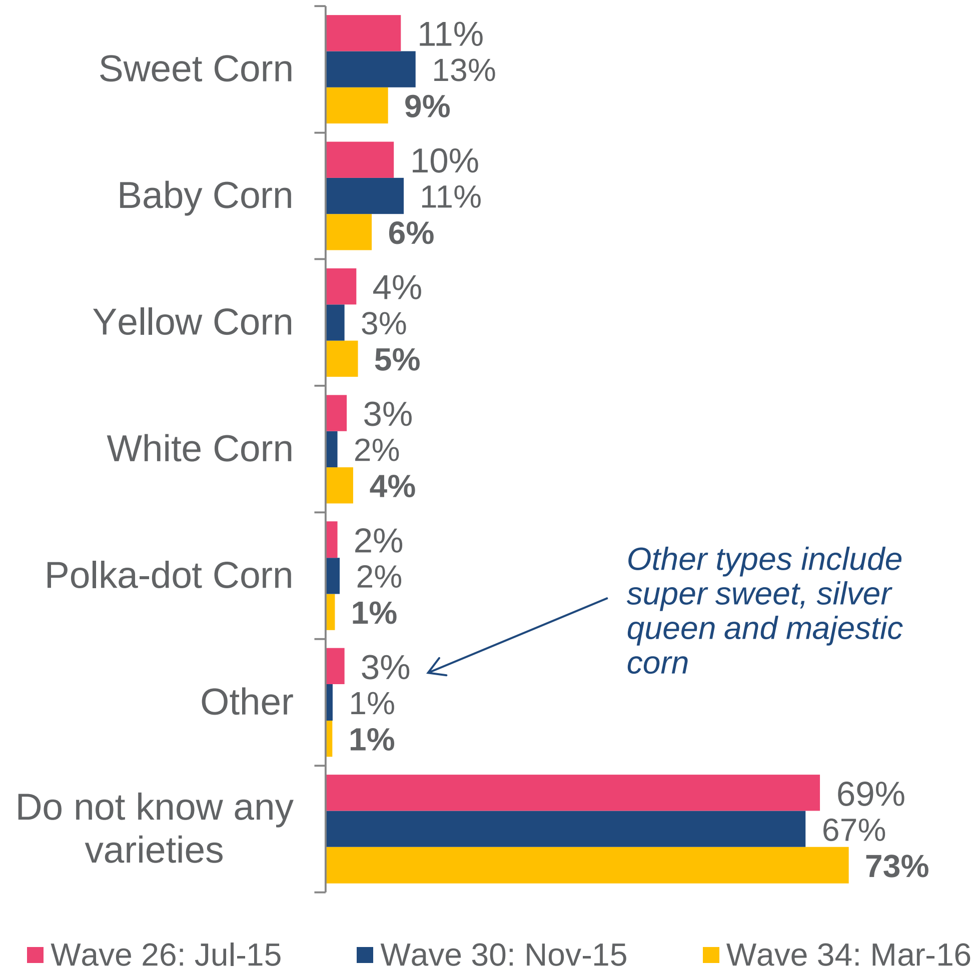


- The average price for sweet corn in March was $0.96 per cob, which was lower than November 2015 ($1.42 per cob).
- There was little variation between states and retailers. The cheapest price was $0.60 in Perth. The most expensive price was $1.20 in several locations. Additionally, multiple states and retailers had a special price promotion of 4 for $2.
- The retail price range was $0.60.

Pricing was carried out on 16th March 2016 between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates in-store promotional price.

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

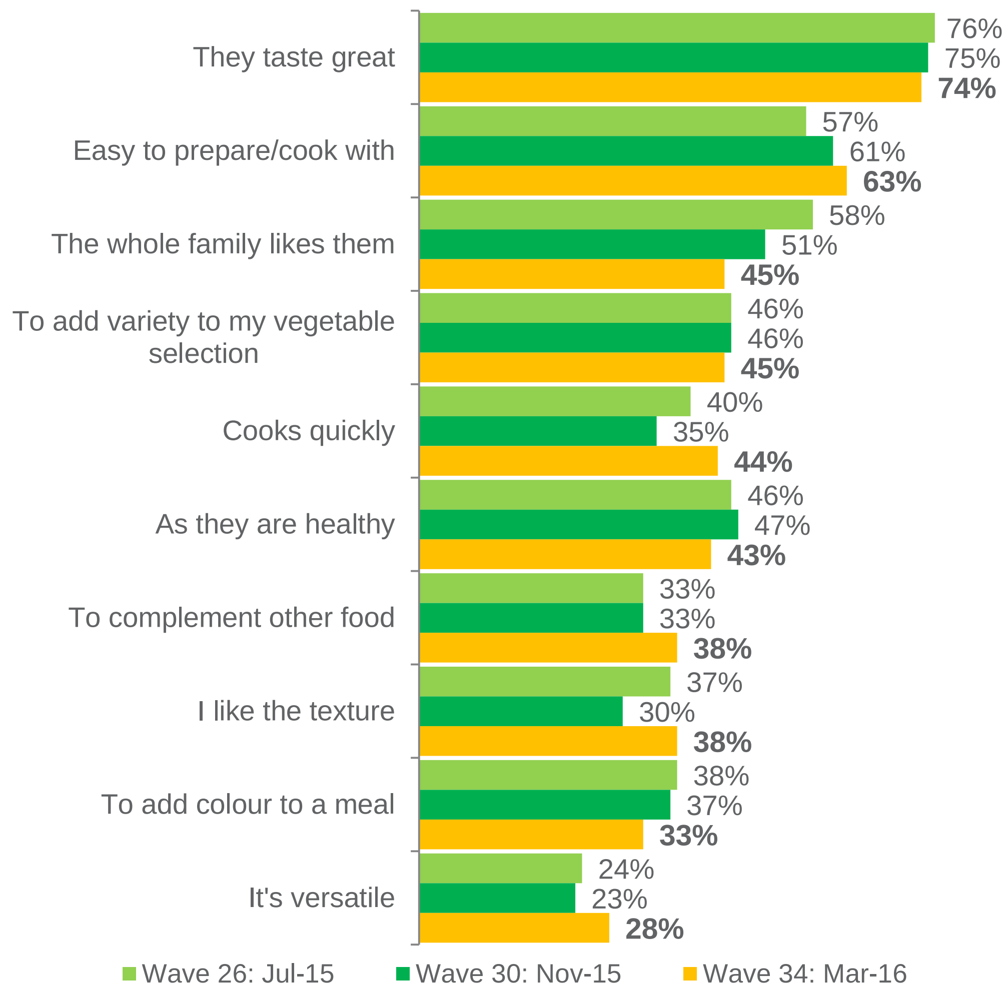
Sweet corn in general remains the most recalled type.



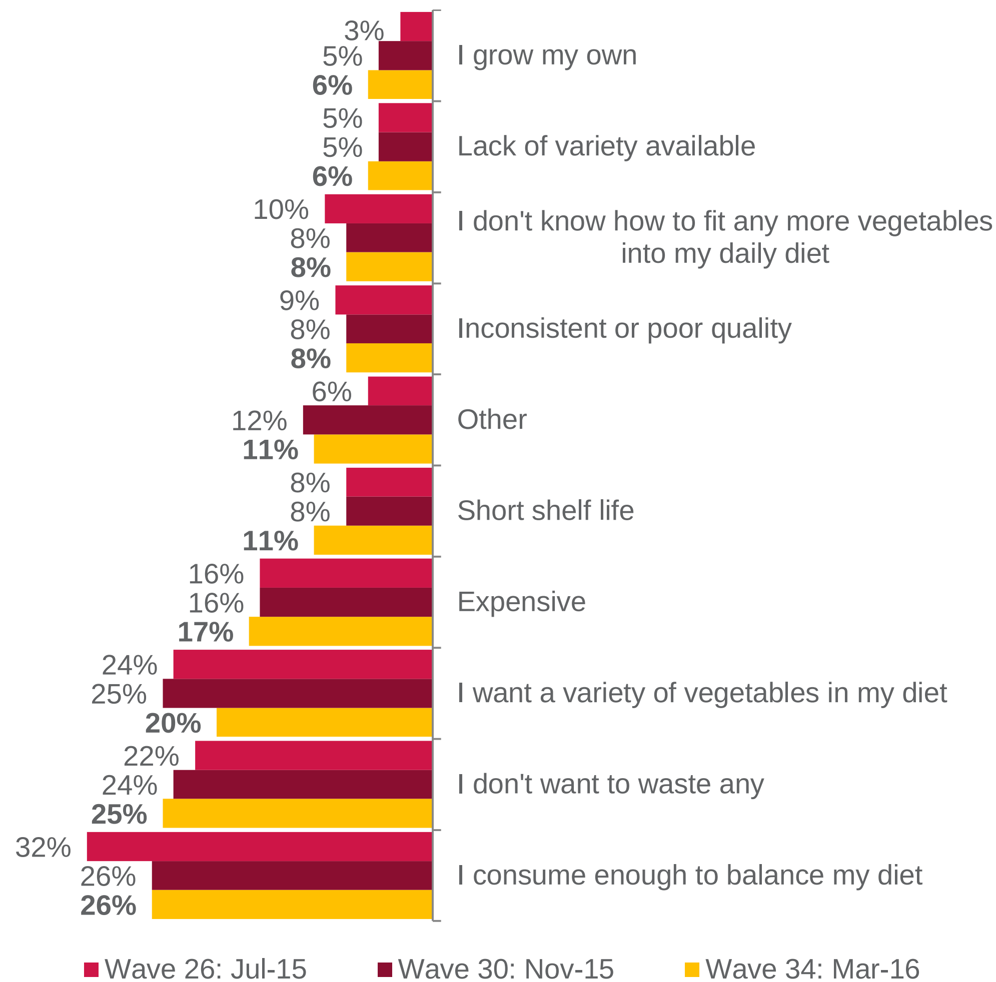
Q6a. What varieties of <commodity> are you aware of? (unprompted)
Sample Wave 26 N=304, Wave 30 N=302, Wave 34 N=310

The key triggers to purchasing sweet corn are taste and ease of preparation. Key barriers for consumers include already consuming enough and not wanting to waste any.

Triggers



Barriers



Q7. Which of the following reasons best describes why you purchase <commodity>?
Q8. Which reason best describes why you don't buy <commodity> more often?
Sample Wave 26 N=304, Wave 30 N=302, Wave 34 N=310

Top 5 Consumption Occasions

	Wave 30	Wave 34
Dinner	66%	**69%**
Family Meals	58%	**52%**
Weekday Meals	42%	**43%**
Weekend Meals	35%	**39%**
Quick Meals	39%	**35%**

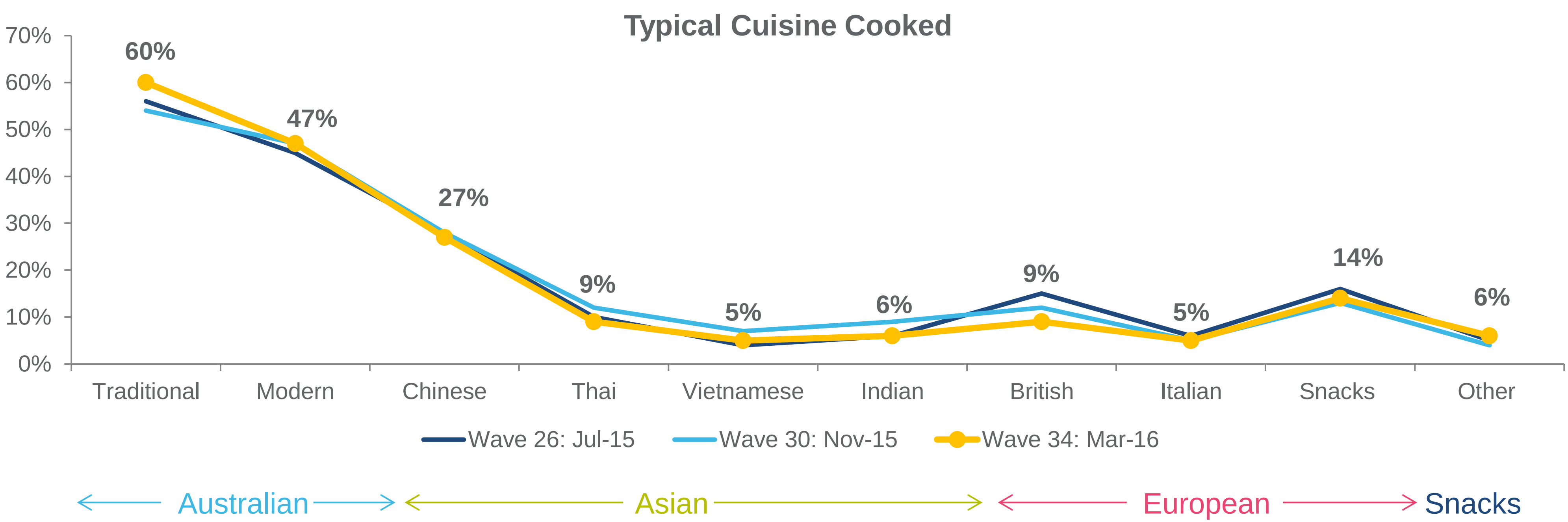
10% used sweet corn when cooking a new recipe

▲ 13%, Wave 26

▲ 14%, Wave 30

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

Dinner and family meals remain the main meal occasions for corn.



Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?
Sample Wave 26 N=304, Wave 30 N=302, Wave 34 N=310

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

On trend with previous waves, consumers prefer to boil, steam and microwave sweet corn. Grilling sweet corn continues to be an increasing trend amongst consumers. Potatoes, carrots and broccoli are regularly served as accompanying vegetables.

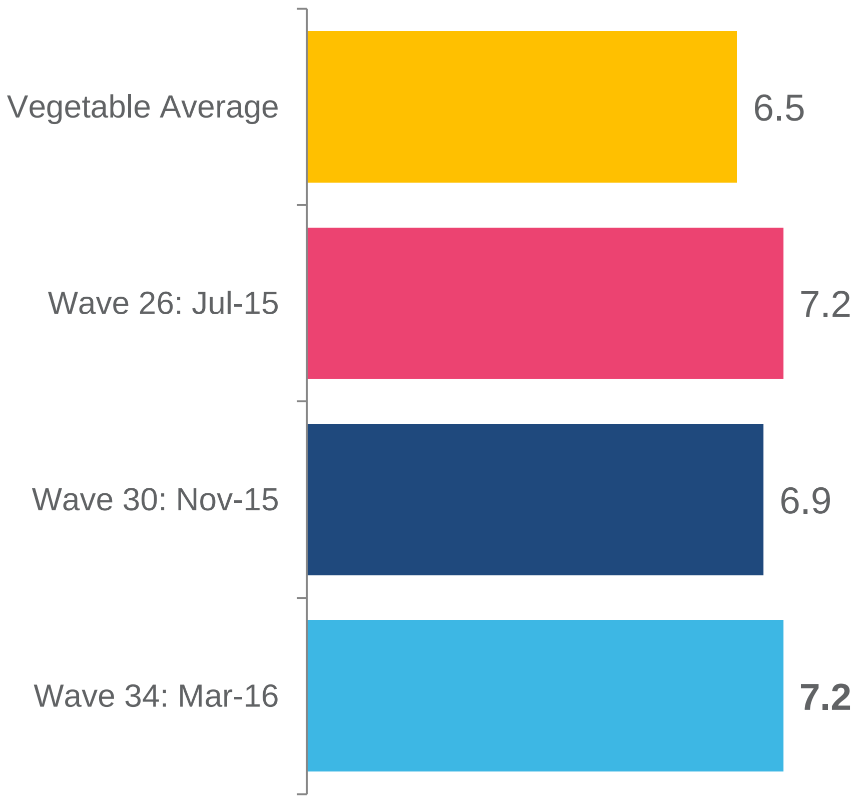
Accompanying Vegetables

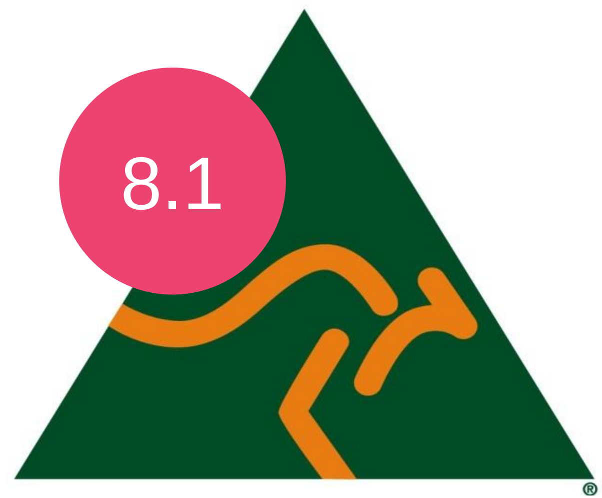
Potatoes	54% ▼
Carrot	49% ▼
Broccoli	36% ▼
Beans	33% ▼
Green Peas	29% ▼

Top 10 Cooking Styles			
	Wave 26	Wave 30	**Wave 34**
Boiling	54%	58%	**53%**
Steaming	46%	46%	**42%**
Microwave	31%	25%	**28%**
Stir frying	24%	25%	**22%**
Grilling	14%	17%	**18%**
Soup	20%	18%	**17%**
Roasting	14%	12%	**10%**
Raw	6%	9%	**8%**
Slow Cooking	8%	6%	**8%**
Frying	5%	6%	**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 26 N=304, Wave 30 N=302, Wave 34 N=310

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



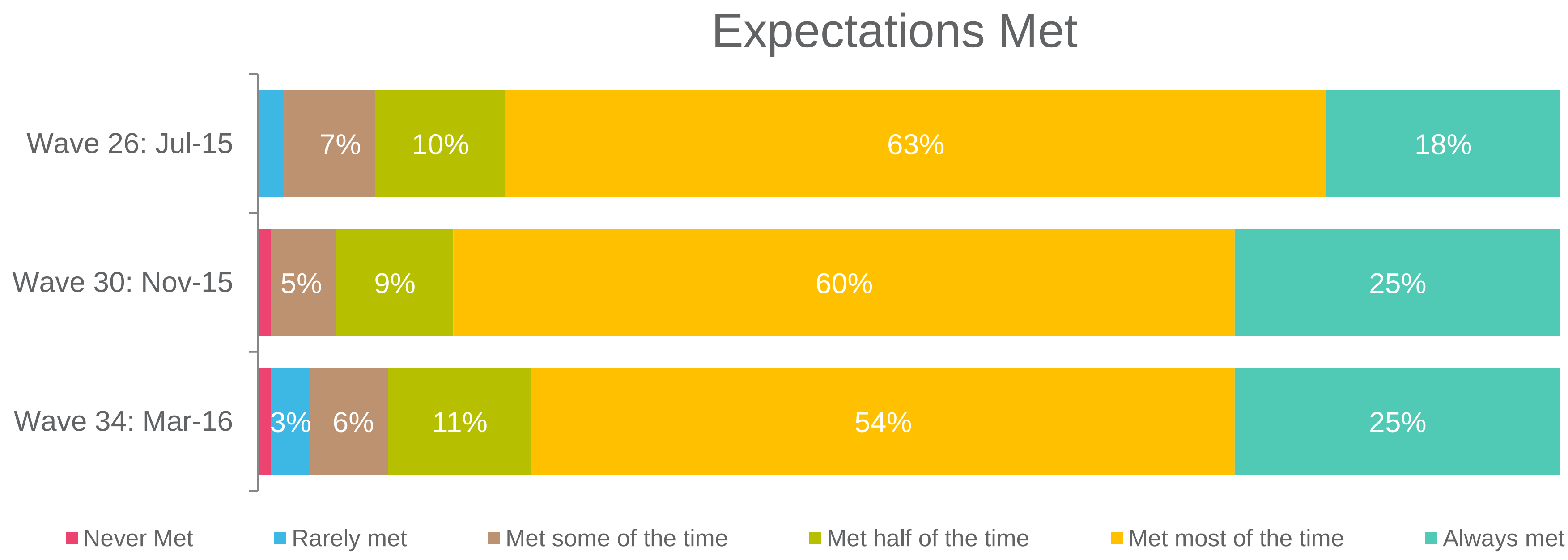


Q14. When purchasing <commodity>, how important is Provenance to you?
Q15. And when purchasing Sweet Corn, how important is that it is grown in Australia?
Sample Wave 26 N=304, Wave 30 N=302, Wave 34 N=310

Sweet corn is expected to stay fresh for just over a week, consistent with previous waves. Expectations of freshness are being met most of the time.

Expected to stay fresh for **8.2** days

▼ 8.0 days, Wave 26
▼ 7.8 days, Wave 30



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 26 N=304, Wave 30 N=302, Wave 34 N=310

Horticulture Innovation Australia
colmar brunton.

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

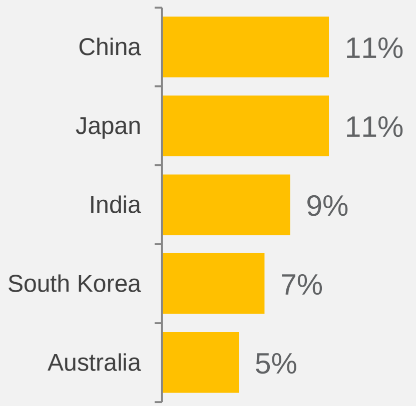
Sweet Corn Product Launch Trends.

Sweet Corn Global Launches

January – March 2016

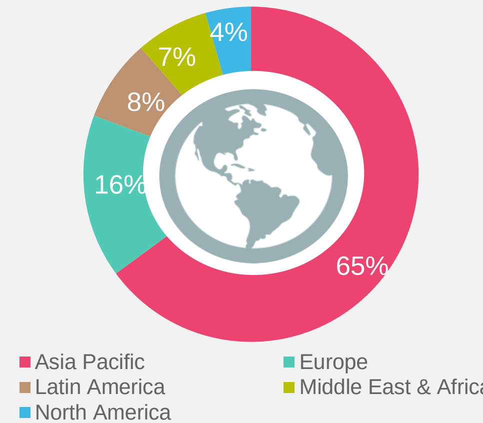
There were 114 sweet corn products launched globally over the last three months. The countries with the most launches were China and Japan. Key categories for launches were fruit & vegetables products, and meals. Flexible packaging was most popularly utilised.

Country

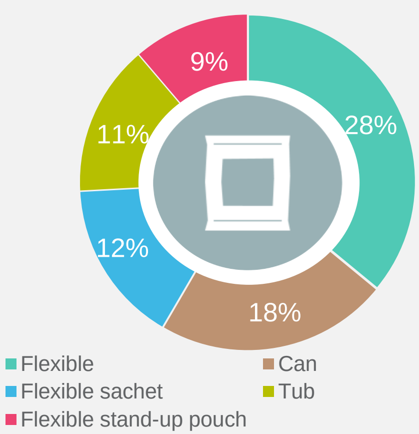


114 Global NPDs

Region



Top Pack Formats



Categories

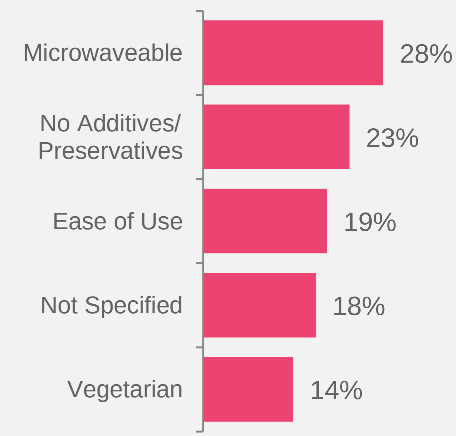
Fruit & Vegetables 31%

Meals 22%

Snacks 15%

Soup 10%

Top Claims

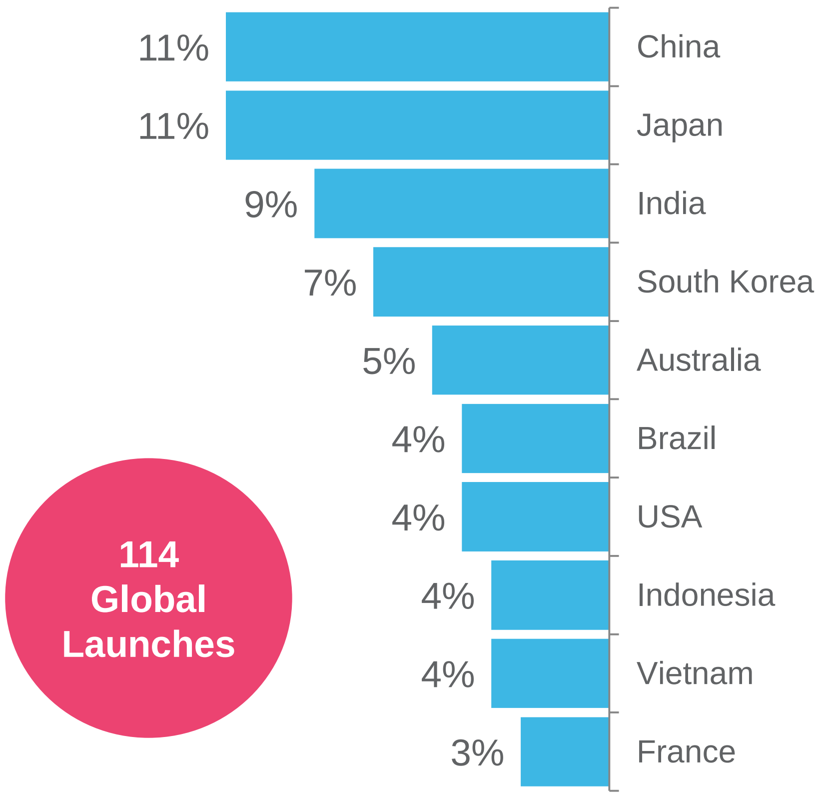


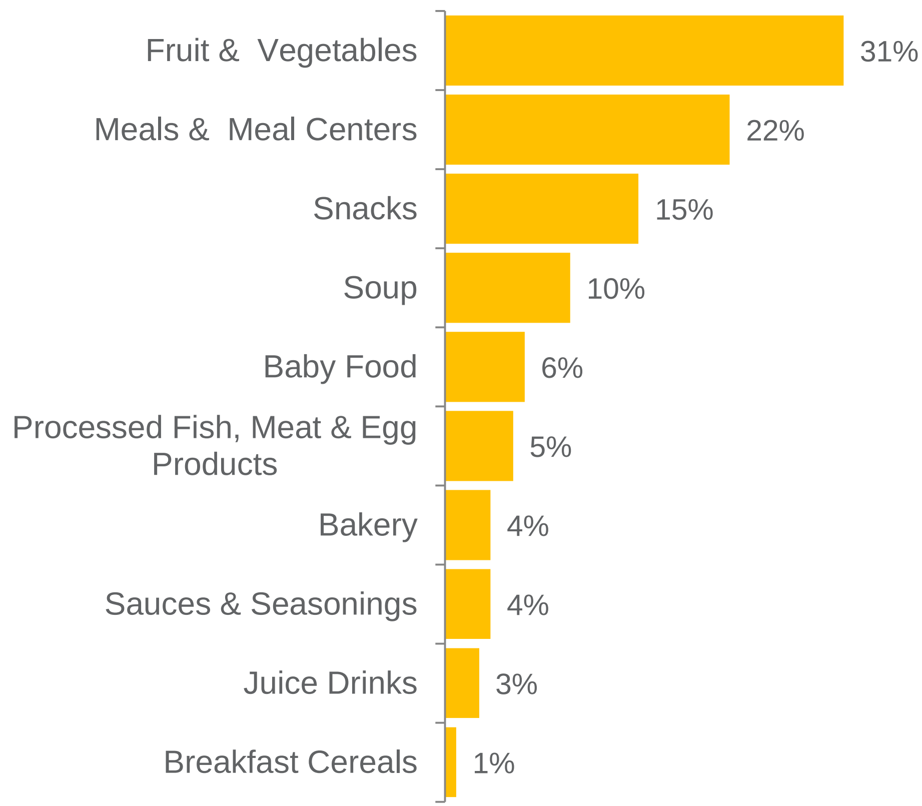
Sweet Corn Product Launches:
Last 3 Months (January – March 2016)
Summary

- There were 114 product launches in the past 3 months globally that contained sweet corn as an ingredient, slightly higher than the previous wave.
- There were 6 products launched in Australia over the past three months.
- Asia Pacific (65%) and Europe (16%) were the key regions for launches.
- Flexible packaging (28%) remained the most common format used for products.
- The main categories for launches were fruits & vegetables (31%), meals (22%), and snacks (15%).
- Claims used on products included microwaveable (28%), no additives/preservatives (23%), and ease of use (19%).
- The most innovative product launched was Corn Juice from China. Other examples can be found in the following pages.

Source: Mintel (2016)

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





The main claims globally were microwaveable, no additives & preservatives, and ease of use. This was consistent in Asia Pacific. Flexible packaging is primarily used for sweet corn products.

Pack Formats Used

Global	Flexible	28%
	Can	18%
	Flexible Sachet	12%
Asia Pacific	Flexible	30%
	Flexible Sachet	18%
	Tub	12%

Top Claims Used

Global	Microwaveable	28%
	No Additives/Preservatives	23%
	Ease of Use	19%
Asia Pacific	Microwaveable	28%
	No Additives/Preservatives	26%
	Ease of Use	22%

Only regions with n >30 are displayed

Innovative Sweet Corn Launches:
L3M (January – March 2016)

CP Cooking Kit Chicken Cake (Singapore)

CP Cooking Kit Chicken Cake contains chicken meat wrapped with bean curd skin and it is said to be quick and easy to cook, delicious on its own or as a versatile cooking ingredient. This halal product can be deep fried, microwaved, steamed, boiled or cooked in the oven, is free from added preservatives and retails in a 350g bag that features a QR code.

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

Maggi Nutri-licious Pazzta Cheese Macaroni Pasta (India)

Maggi Nutri-licious Pazzta Cheese Macaroni Pasta has been repackaged with an updated look highlighting that the product has been made from 100% semolina and to require only five minutes to cook. The vegetarian product contains two serves of required six daily serves of cereal. It retails in a 70g pack containing a sachet of Tastemaker, featuring cooking instructions.

Claims:
Vegetarian, Time/Speed

Verdi Fresh Refreshing Tarifa Smoothie with Kiwi, Corn, Banana, Lettuce and Matcha Tea (Spain)

Verdi Fresh Referscante Tarifa Smoothie Zumo de Fruta y Verdura con Extractos Vegetales Kiwi, Maíz, Plátano y Lechuga con Té Matcha (Refreshing Tarifa Smoothie with Kiwi, Corn, Banana, Lettuce and Matcha Tea) is now available. The gluten- and lactose-free product is also free from added sugars and contains 89% fruit and 10% vegetables. It provides 41% of the recommendable fruit and vegetable daily intake. The product retails in a 250g pack.

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

Nacho Loco Chicken & Cheese Burritos (Brazil)

Nacho Loco Burritos de Frango com Queijo (Chicken & Cheese Burritos) are available with a new recipe. This ready to heat and serve product is mildly seasoned, can be microwaved and retails in a 520g pack containing four burritos, and featuring a recipe suggestion, Facebook and Instagram page links.

Claims:
Microwaveable, Ease of Use, Social Media

Source: Mintel (2016)

Innovative Sweet Corn Launches:
L3M (January – March 2016)

Orion New Pop Roast Corn Flavour Popped Corn Chips (South Korea)

Orion New Pop Roast Corn Flavour Popped Corn Chips are made of whole corn kernels popped into a thin chip shape instead of frying. This product retails in a 55g pack bearing the HACCP logo.

Claims:
N/A

Shineway / Shuanghui Run Kou Xiang Tian Wang Sweetcorn Flavoured Sausage (China)

Shineway / Shuanghui Run Kou Xiang Tian Wang Yu Mi Fen Wei Xiang Chang (Sweetcorn Flavoured Sausage) has been repackaged. It can be served directly from the pack, or can be flash fried, microwaved, deep fried and barbecued to serve. This product contains greater than or equal to 10% sweetcorn, and is now available in a newly designed 480g pack containing ten 48g units.

Claims:
Microwaveable

I Want Moor Snacks Tasty Chicken Flavoured Corn Snacks (New Zealand)

I Want Moor Snacks Tasty Chicken Flavoured Corn Snacks are now available. The product retails in an 60g pack.

Claims:
N/A

Bernardi Steamboat Instant Processed Fish with Vegetables (Indonesia)

Bernardi Steamboat Instan Daging Ikan Olahan dengan Sayuran (Instant Processed Fish with Vegetables) is completed with an extra broth and chili sauce. The halal certified product contains all the ingredients for a steamboat dish and retails in a 300g pack.

Claims:
Halal, Time/Speed

Source: Mintel (2016)

Innovative Sweet Corn Launches:

L3M (January – March 2016)

FamilyMart Famí by Besto Cassava Balls (Thailand)

FamilyMart Famí by Besto Mun Tip (Cassava Balls) are now available. This microwaveable product retails in an 80g pack containing two sticks.

Claims:
Microwaveable

Premium Umaibo Wasabi Sauce Beef Steak Corn Snack (Japan)

Premium Umaibo Wasabi Sauce Beef Steak Corn Snack features a tangy and refreshing flavour. It is made with GMO-free corn and retails in a 9g pack.

Claims:
Premium, GMO-Free

Gong Xiang Wei Lai Corn Juice (China)

Gong Xiang Wei Lai Yu Mi Zhi Yin Liao (Corn Juice) has been repackaged and is now available in a newly designed 300ml pack featuring two QR codes. This product is described as a healthy grain drink, and contains greater than or equal to 20% of corn juice content.

Claims:
N/A

Bugles Fresh and Aromatic Seaweed Flavoured Rice Snack (China)

Bugles Xian Xiang Hai Tai Wei Miao Xiang Mi (Fresh and Aromatic Seaweed Flavoured Rice Snack) has been relaunched with an upgraded formula and is now free from artificial flavouring. It is made using sunshine corn and processed according to an advanced technique to blend the real corn juice into the snack.

Claims:
No Additives/Preservatives

Source: Mintel (2016)

Australian Sweet Corn Launches:
L3M (January – March 2016)

Hydale Mayo with Sweetcorn Chicken Snack Kit with Crackers

Hydale Mayo with Sweetcorn Chicken Snack Kit with Crackers contains 100% chicken breast, is a good source of protein and has no artificial colours, flavours or preservatives. The product retails in a 103g pack containing six crackers and a spoon and napkin included.

Claims:
No Additives/Preservatives

Colway Corn Relish

Colway Corn Relish is made with a traditional corn relish recipe and a classic blend of corn kernels and capsicum. It is 98% fat free and contains no artificial colours, flavours or preservatives. This product is suitable for vegans and vegetarians and retails in a 300g jar.

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

Edgell Red Kidney Bean Salad

Edgell Red Kidney Bean Salad is described as a combination of quinoa and black bean in a smoked paprika dressing. It is packed with flavour and is high in protein. This ready-to-eat product can be enjoyed anywhere, has a 4.5 health star rating and retails in a 200g pack.

Claims:
High Protein, On-the-Go, Ease of Use

Source: Mintel (2016)

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Green Peas.

There has been a decline in purchase and consumption frequencies of green peas this wave.

Green peas are generally purchased from mainstream retailers, with specialist vegetable retailers also a popular channel utilised.

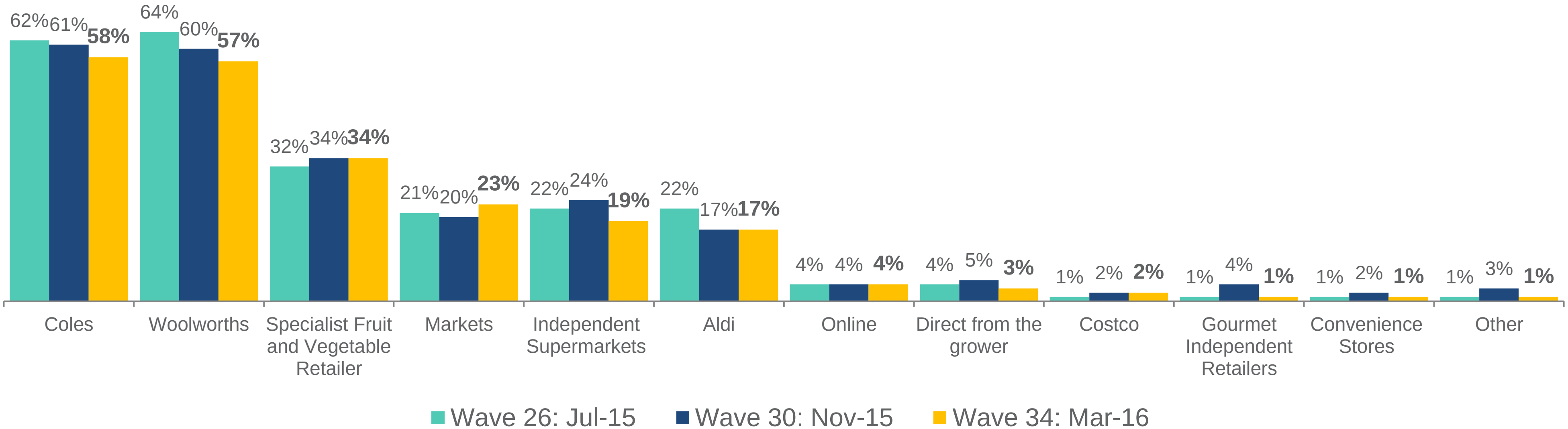
Average Purchase **4.2** times per month

▲ 4.5 times, Wave 26
▲ 4.7 times, Wave 30

Average Consumption **9.9** times per month

▲ 10.1 times, Wave 26
▲ 10.6 times, Wave 30

Purchase Channels



Q1. On average, how often do you purchase green peas?
Q2. On average, how often do you consume green peas?
Q5. From which of the following channels do you typically purchase green peas?
Sample Wave 26 N=309, Wave 30 N=306, Wave 34 N=307

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

Average Spend and Price Sensitivity.

Average weight of purchase

The average consumer typically purchases **600g** of green peas, slightly below the previous wave.

▲ 700g, Wave 26
▲ 700g, Wave 30

Recalled last spend

Recalled last spend on green peas is **$3.80**, which has declined over the last three waves.

▲ $4.30, Wave 26
▲ $4.20, Wave 30

Value for money

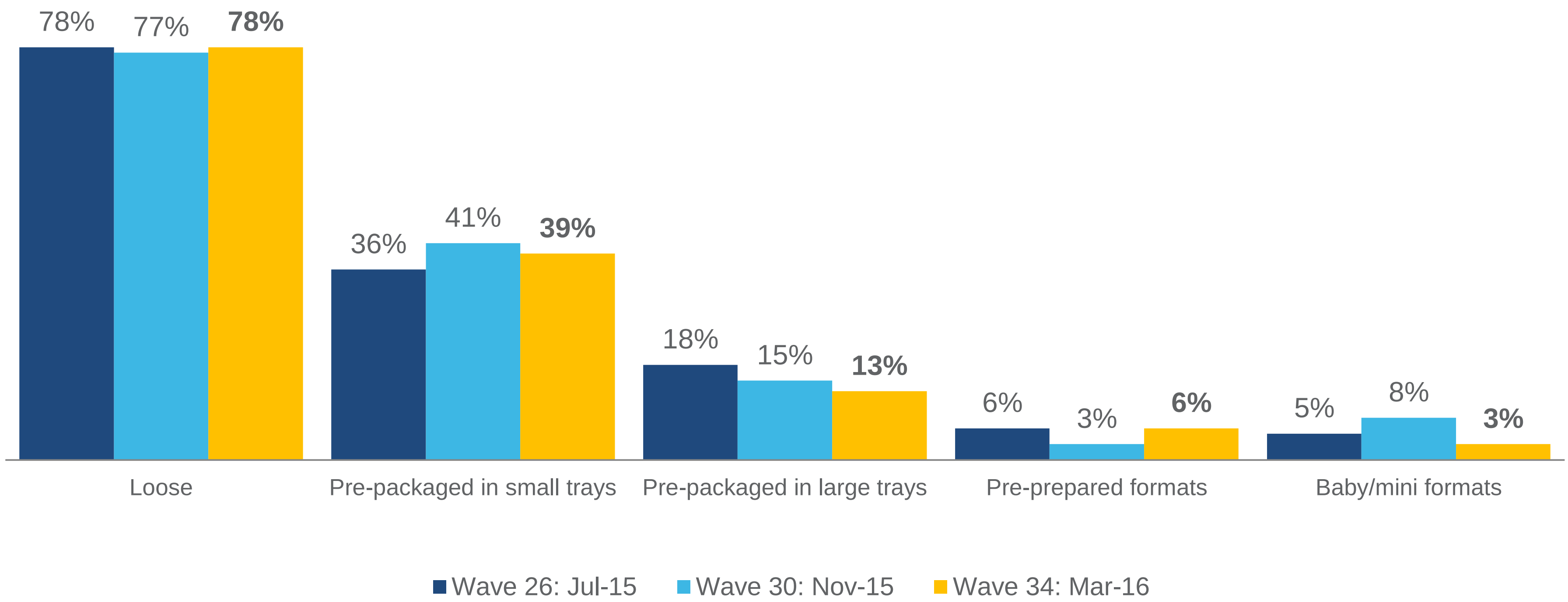
Consumers' perceived value for money is good for green peas **(6.5/10)**, marginally increasing from the last two waves.

▼ 6.3/10, Wave 26
▼ 6.3/10, Wave 30

Q3. How much leek do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 26 N=309, Wave 30 N=306, Wave 34 N=307

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

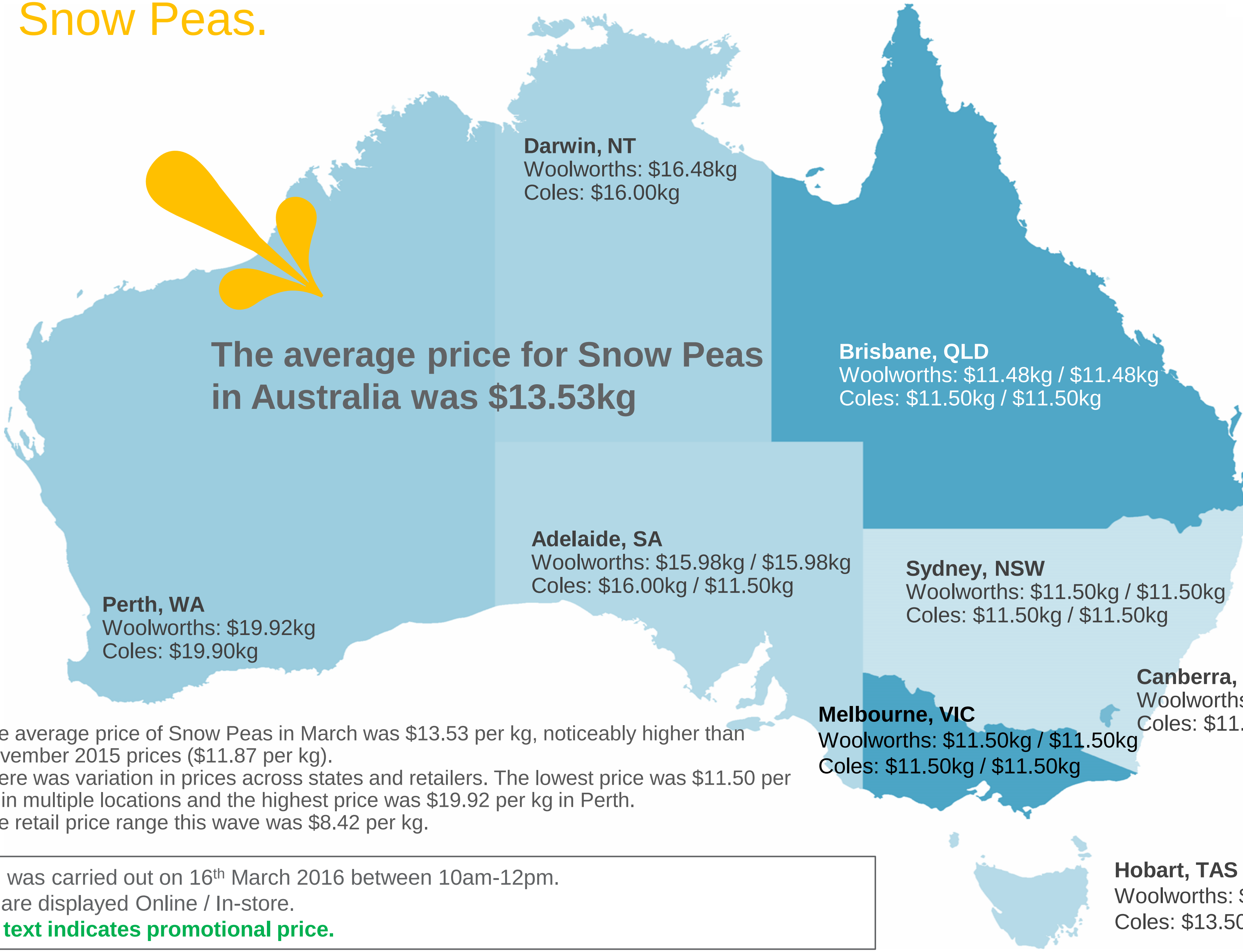
Individual green peas are the most common purchase format. There has been a decline in purchase of pre-packaged large trays over the last three waves.



Q4b. In what fresh formats do you typically purchase green peas?
Sample Wave 26 N=309, Wave 30 N=306, Wave 34 N=307

Online and In-store Commodity Prices.

Snow Peas.

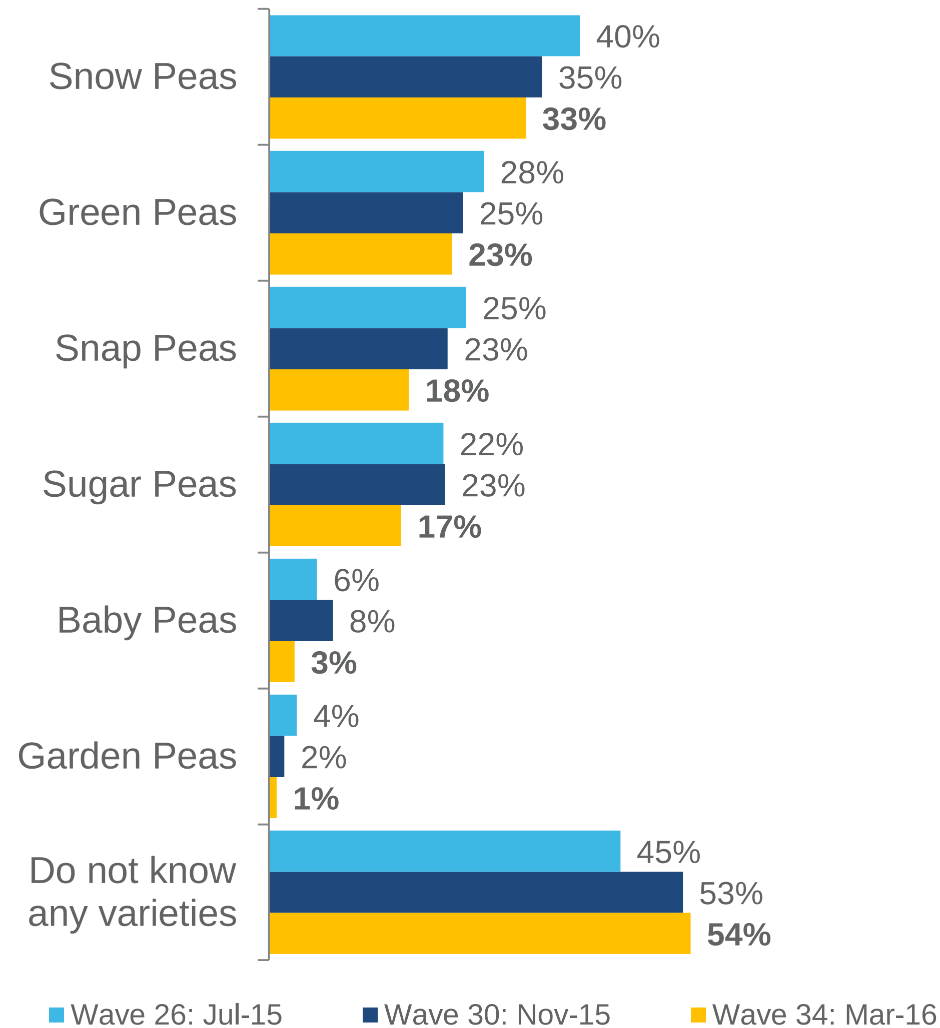


- The average price of Snow Peas in March was $13.53 per kg, noticeably higher than November 2015 prices ($11.87 per kg).
- There was variation in prices across states and retailers. The lowest price was $11.50 per kg in multiple locations and the highest price was $19.92 per kg in Perth.
- The retail price range this wave was $8.42 per kg.

Pricing was carried out on 16th March 2016 between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates promotional price.

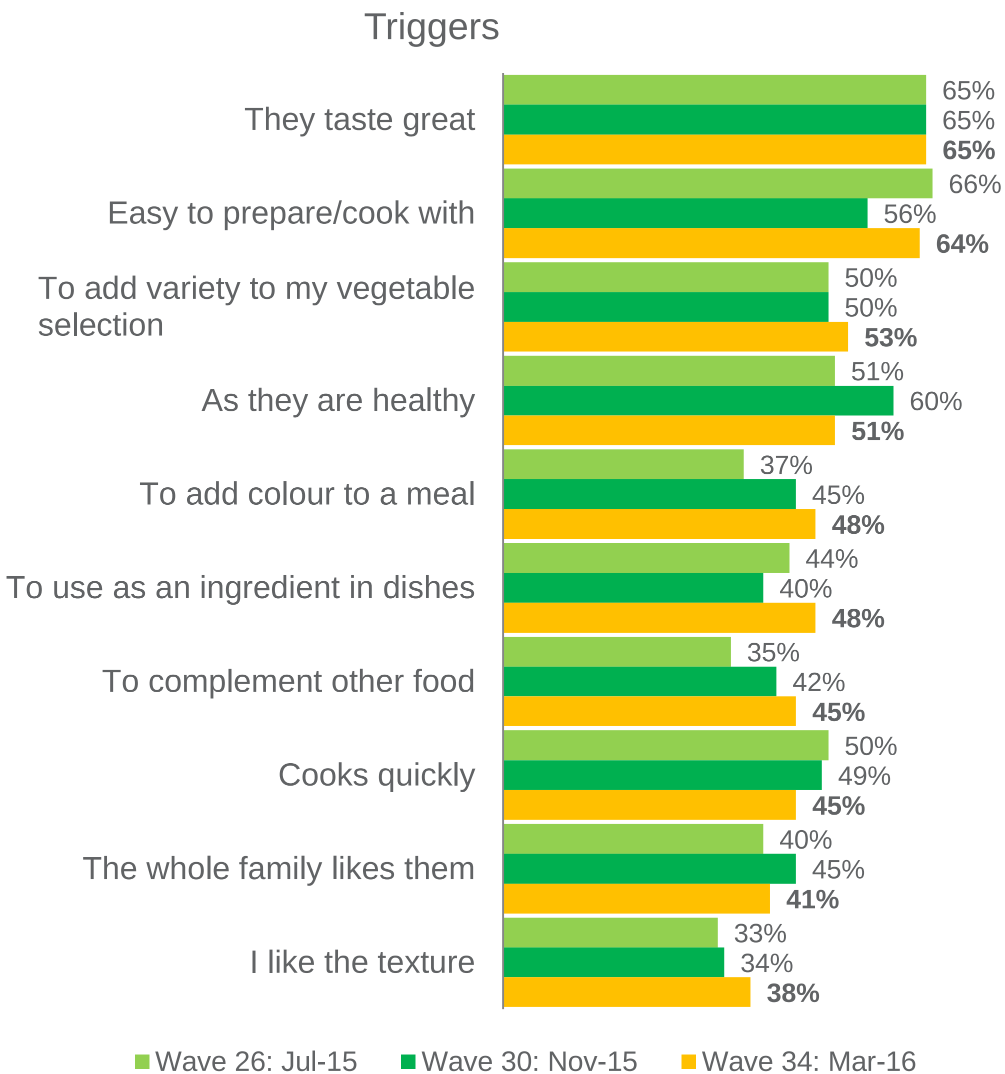
Snow Peas and Green Peas are the most commonly recalled varieties.

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



Q6a. What types/varieties of <commodity> are you aware of? (unprompted)
Sample Wave 26 N=309, Wave 30 N=306, Wave 34 N=307

Taste and ease of preparation are the key drivers of purchase. In contrast, the key barriers to purchase are already consuming enough and expense. There is an increasing trend in colour, texture and complementing other food as triggers to purchase.



Q7. Which of the following reasons best describes why you purchase green peas?
Q8. Which reason best describes why you don't buy green peas more often?
Sample Wave 26 N=309, Wave 30 N=306, Wave 34 N=307

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Green pea dishes are most popular in Australian and Chinese cuisine, consistent with past waves.

Meal occasions tend to occur during dinner meals.

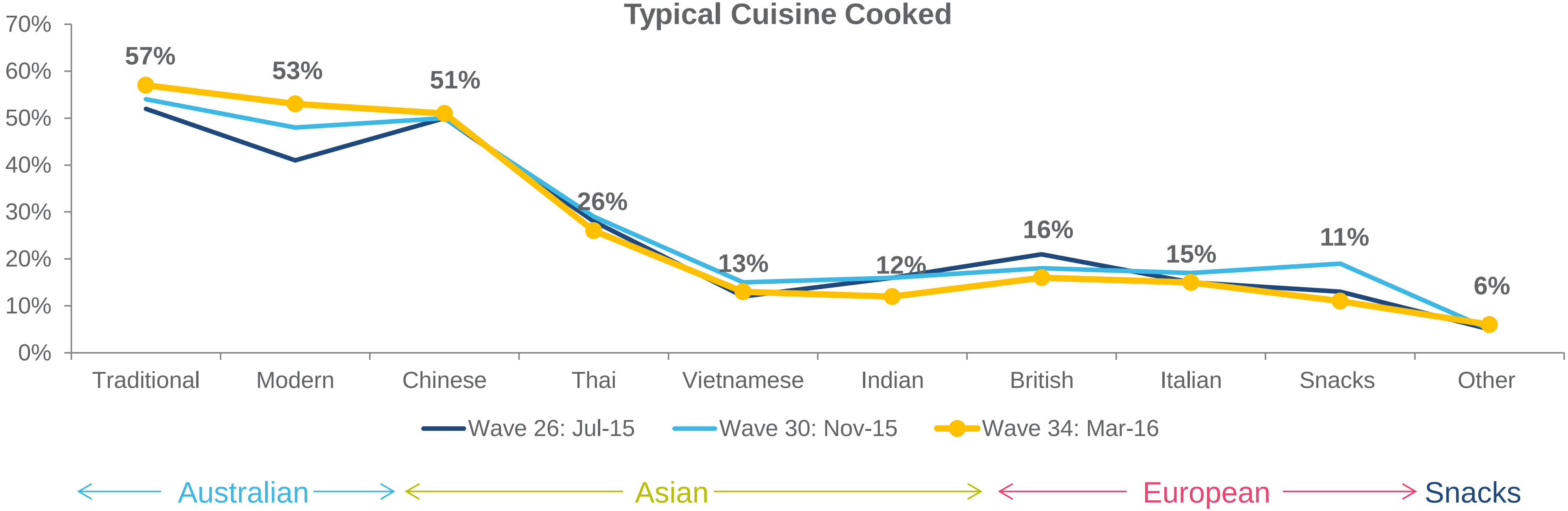
Top 5 Consumption Occasions

	Wave 30	Wave 34
Dinner	74%	**78%**
Family meals	64%	**61%**
Weekday meals	48%	**52%**
Weekend meals	43%	**46%**
Quick meals	50%	**44%**

21% used green peas when cooking a new recipe

▲ 23%, Wave 26
▼ 19%, Wave 30

Typical Cuisine Cooked



Q10. What cuisines do you cook/consume that use green peas?
Q11. Which of the following occasions do you typically consume/use green peas?
Sample Wave 26 N=309, Wave 30 N=306, Wave 34 N=307

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

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

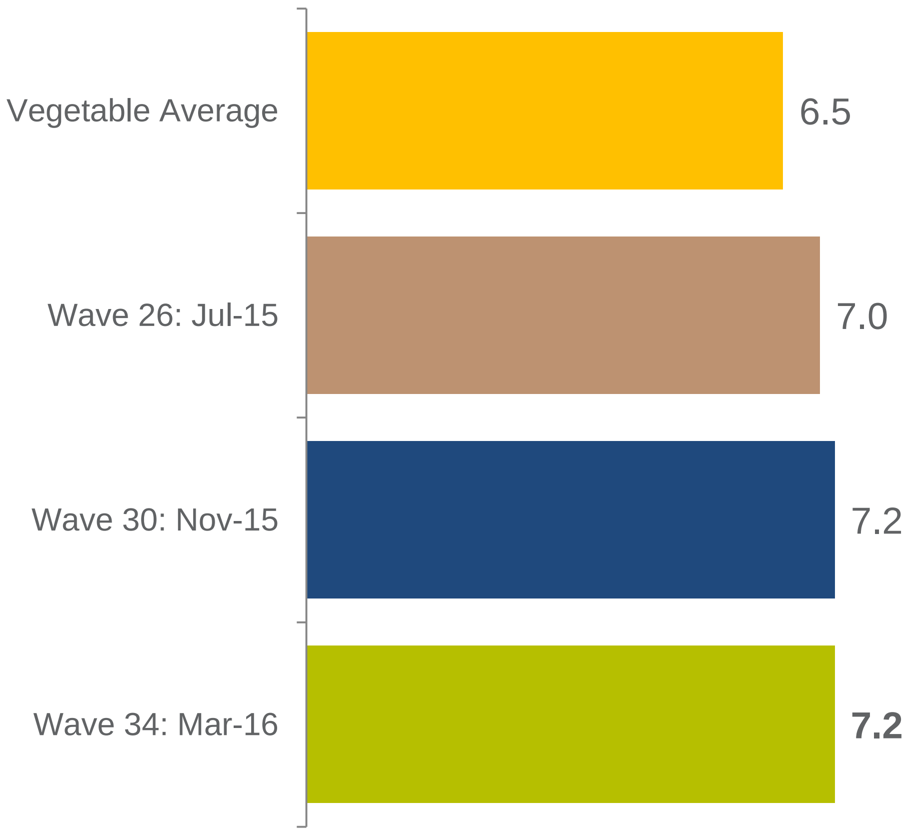
Accompanying Vegetables

Carrot	67%
Potato	52%
Broccoli	39%
Capsicum	38%
Onion	38%

Top 10 Cooking Styles			
	Wave 26	Wave 30	**Wave 34**
Stir frying	59%	59%	**57%**
Steaming	49%	54%	**53%**
Boiling	42%	40%	**42%**
Raw	32%	40%	**35%**
Microwave	23%	26%	**25%**
Soup	20%	16%	**19%**
Slow Cooking	13%	13%	**15%**
Sautéing	14%	12%	**13%**
Frying	9%	9%	**9%**
Mashing	8%	5%	**5%**

Q9. How do you typically cook green peas?
Q10a. And when are you serving green peas which of the following do you also serve together with this?
Sample Wave 26 N=309, Wave 30 N=306, Wave 34 N=307

Importance of provenance has remained stable this wave. Knowing that green peas are grown in Australia remains the most important provenance information for consumers.



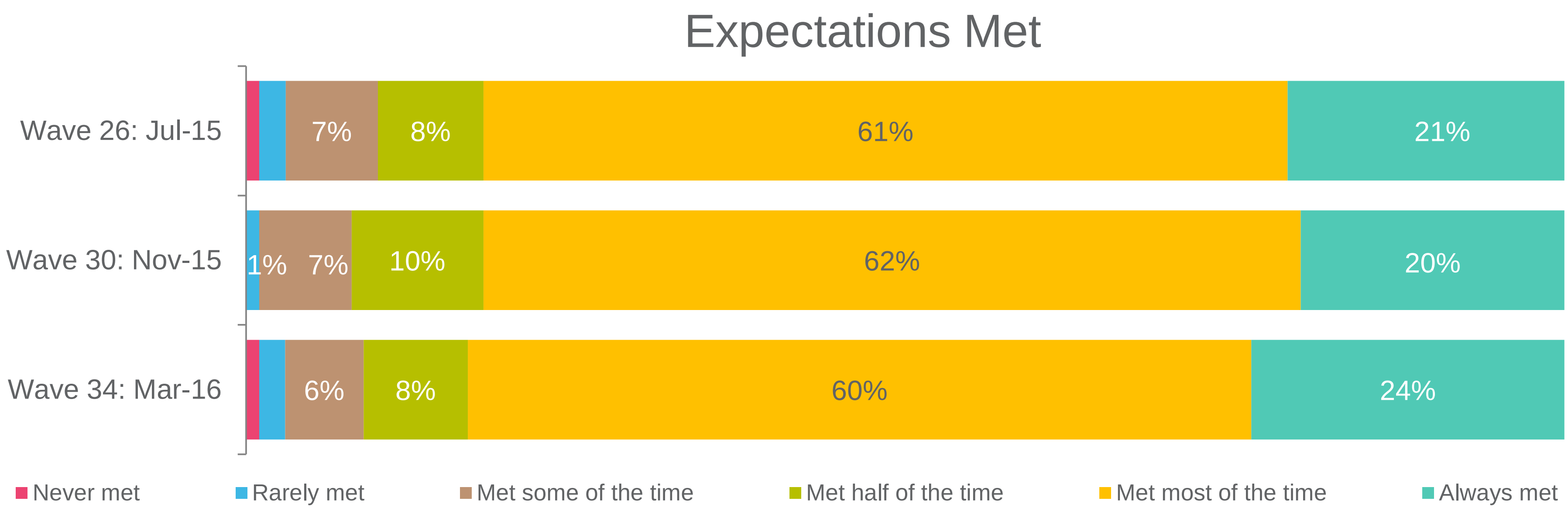
8.2

Q14. When purchasing green peas, how important is Provenance to you?
Q15. And when purchasing green peas, how important is that it is grown in Australia?
Sample Wave 26 N=309, Wave 30 N=306, Wave 34 N=307

Consumers expect green peas to remain fresh for over a week once purchased, with this expectation being met most of the time.

Expected to stay fresh for **8.3** days

▲ 9.2 days, Wave 26
▼ 8.2 days, Wave 30



Q12. How long do you expect green peas to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy green peas?
Sample Wave 26 N=309, Wave 30 N=306, Wave 34 N=307

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

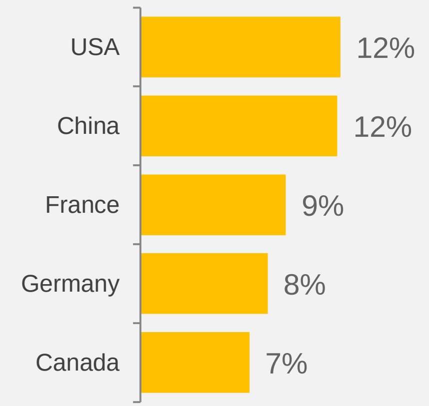
Green Peas Product Launch Trends.

Green Peas Global Launches

January – March 2016

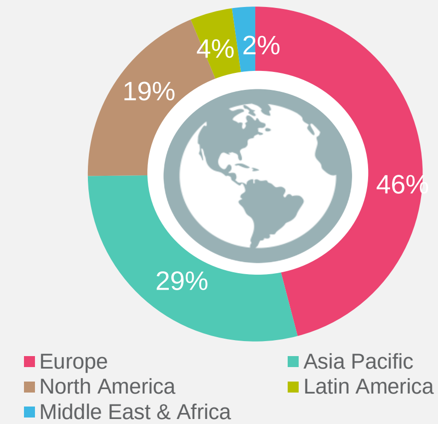
There were 540 green pea products launched globally over the last three months. The majority of launches were from the USA and China. Categories for launches were snacks and processed products. Key packaging for green pea products was flexible formats.

Country

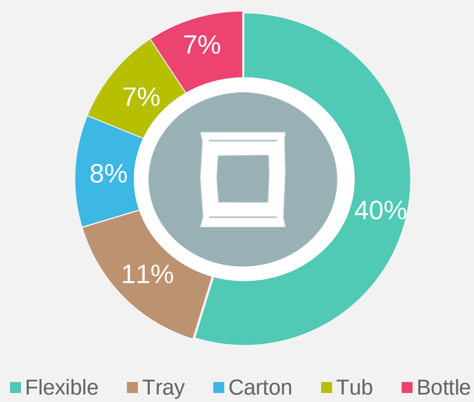


540 Global NPDs

Region



Top Pack Formats



Categories

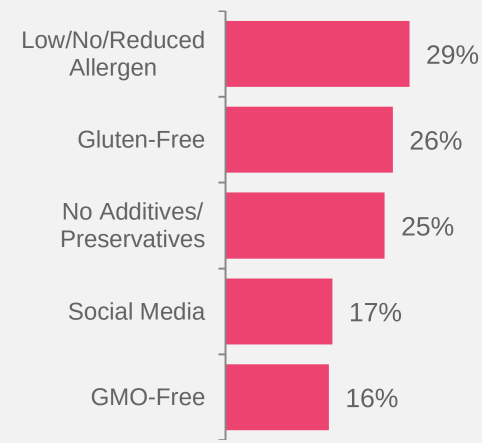
Snacks 24%

Processed Products 14%

Meals 10%

Bakery 10%

Top Claims



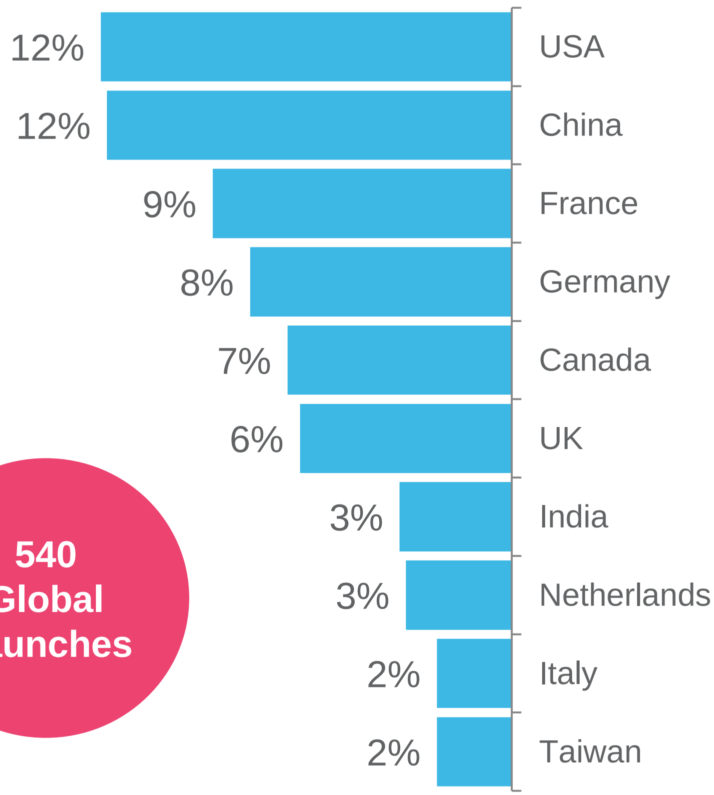
Green Peas Product Launches:
Last 3 Months (January – March 2016)
Summary

- There were 540 launches in the past 3 months globally that contained green peas as an ingredient, noticeably higher than the previous wave (441).
- There were 8 products launched in Australia over the past three months.
- Europe (46%) and Asia Pacific (29%) were the key regions for launches.
- Flexible packaging (40%) was the most common format used for products.
- The main categories for launches were snacks (24%), processed products (14%), and meals (10%).
- Claims used on products highlighted health; low/no/reduced allergen (29%), gluten free (26%), and no additives/preservatives (25%).
- The most innovative product launched included Sea Salt Flavoured Protein Chips from Brazil. Examples of these can be found in the following pages.

Source: Mintel (2016)

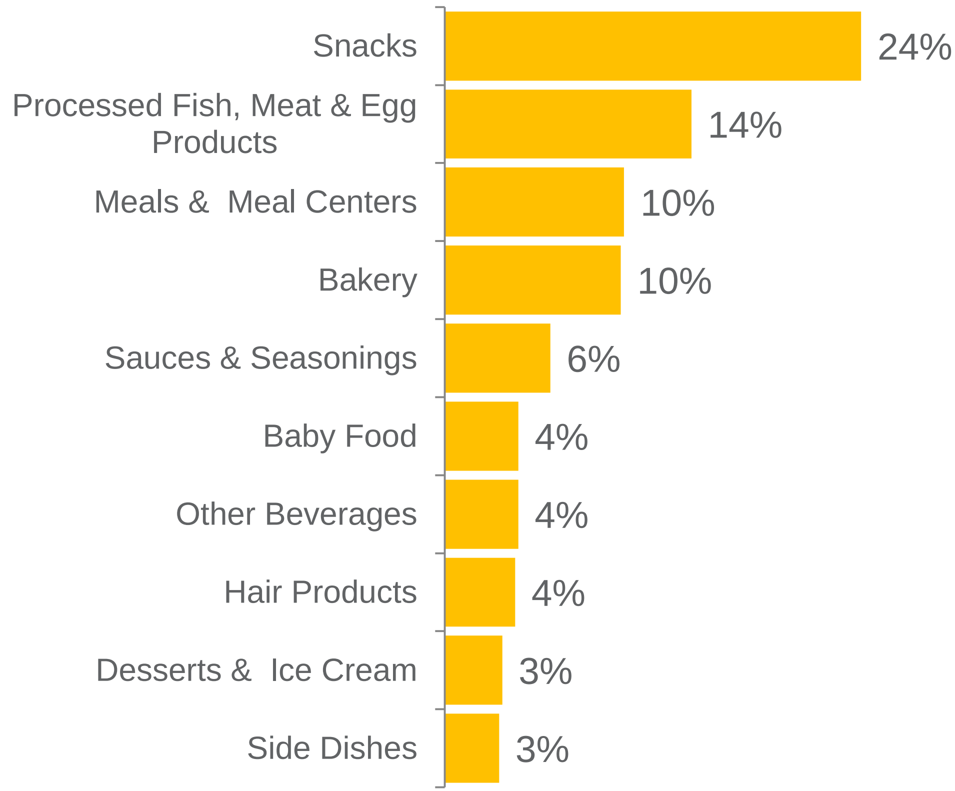
The majority of launches occurred in USA and China. The key categories for green pea launches are snacks, processed products and meals, relatively consistent with the previous wave.

Top Launch Countries



540 Global Launches

Top Launch Categories



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

Pack Formats Used

Global	Flexible	40%
	Tray	11%
	Carton	8%
Europe	Flexible	39%
	Tray	21%
	Carton	10%
Asia Pacific	Flexible	42%
	Bottle	12%
	Flexible Stand-Up Pouch	11%

Top Claims Used

Global	Low/No/Reduced Allergen	29%
	Gluten Free	26%
	No Additives/Preservatives	25%
Europe	Low/No/Reduced Allergen	26%
	Gluten Free	22%
	No Additives/Preservatives	20%
Asia Pacific	No Additives/Preservatives	28%
	Vegetarian	20%
	Ease of Use	12%

Only regions with n >30 are displayed

Innovative Green Peas Launches:
L3M (January – March 2016)

Monoprix Chicken Breast Pieces in Crispy Multigrain Breadcrumbs (France)

Monoprix Aiguillettes de Poulet Panure Croustillante Multigraines (Chicken Breast Pieces in Crispy Multigrain Breadcrumbs) The product is made with French origin poultry, and retails in a 250g pack that provides two servings and features preparation instructions.

Claims:
N/A

Pinskey Food Breakfast-Lunch-Dinner Italian Style Spaghetti Beef Bolognese (China)

Pinskey Food Breakfast-Lunch-Dinner Yi Jiang Niu Rou Yi Fen (Italian Style Spaghetti Beef Bolognese) features a soft texture, and is free from preservatives. This product can be heated by microwave, and retails in a 320g pack featuring two QR codes.

Claims:
No Additives/Preservatives, Microwaveable

Shengxiangzhen Garlic Flavoured Green Pea (China)

Shengxiangzhen Suan Xiang Qing Dou (Garlic Flavoured Green Pea) is sourced from Taiwan. This product retails in a 150g pack.

Claims:
N/A

Modern Table Meals Homestyle Mac & Cheese Bean Pasta & Veggie Kit with Lentil Rotini (USA)

Modern Table Meals Homestyle Mac & Cheese Bean Pasta & Veggie Kit with Lentil Rotini contains vegetables, creamy white cheddar sauce and rotini made from green lentils. It is free from gluten, GMO, artificial preservatives and artificial colors. It contains 24g protein and 5g fiber per serving and is said to be yummy and easy to prepare in less than 15 minutes. This product retails in a 12-oz. pack.

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

Source: Mintel (2016)

Innovative Green Peas Launches:
L3M (January – March 2016)

Saffron Road Cucumber Dill Baked Lentil Chips (USA)

Saffron Road Cucumber Dill Baked Lentil Chips contain 4g protein per serving and 70% less fat than potato chips. According to the manufacturer, lentils are low in fat, high in fiber, and a natural source of protein. These chips are gluten free and said to be irresistible and crunchy with exotic flavours. The kosher and halal-certified product is plant-based and retails in a 4-oz. pack, bearing the Facebook, Twitter, Instagram and Pinterest logos.

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

Felicia Bio Linea Legumi Organic Green Peas Fusilli Pasta (Germany)

Felicia Bio Linea Legumi Organic Green Peas Fusilli Pasta is now available. This vegan and kosher certified product is made exclusively with Pedon organic green peas, is a source of iron, and is rich in protein and fibre. It contains no gluten, cooks in four to five minutes, and retails in a 250g pack, bearing the EU Green Leaf and AB Organic logos and a recipe suggestion. The manufacturer claims to use 100% clean energy. This product was on display at Biofach 2016 in Nuremberg, Germany.

Claims:
High/Added Fiber, Kosher, Organic, Cobranded, Gluten-Free, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Product, Vegan, High Protein, No Animal Ingredients

Chia Star Coconut Caramel Cream Protein Shake (USA)

Chia Star Coconut Caramel Cream Protein Shake is now available. The plant protein product comprises organic coconut milk, organic chia seeds, pea protein, quinoa protein and sea salt, and is said to be balanced, satisfying super foods. It has been cold pressure protected and is free from soy, dairy and gluten. It s exclusive to Whole Foods, and retails in a 10-fl. oz. pack.

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

Beyond Chicken Feisty Buffalo Poppers (Germany)

Beyond Chicken Feisty Buffalo Poppers are now available. These seasoned vegan nuggets are made using 100% plant protein and do not contain GMO or antibiotic. The product retails in a 255g pack.

Claims:
Vegan, No Animal Ingredients, GMO-Free

Source: Mintel (2016)

Innovative Green Peas Launches:
L3M (January – March 2016)

Sweet Earth Natural Foods Tuscan Veggie Sausage (USA)

Sweet Earth Natural Foods Tuscan Veggie Sausage is now available. This vegan, all natural, microwaveable, sustainable, cruelty-free, vegetarian, product is described as plant-based patties made with fennel, rosemary, kale, and barley for rustic, hearty flavor. It features 67% less fat and 60% less sodium than pork sausage, 0g of cholesterol and 15g of protein.

Claims:
No Additives/Preservatives, All Natural Product, Low/No/Reduced Cholesterol, Low/No/Reduced Fat, Microwaveable, Low/No/Reduced Sodium, Vegetarian, Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Ethical - Animal, Vegan, High Protein, Social Media

Traditions d'Asie Prawn Ha Cao Dumplings (France)

Traditions d'Asie Raviolis Vapeur Ha Cao Crevette (Prawn Ha Cao Dumplings) have been reformulated. They can be steamed or microwave heated and retail in a 240g partly recyclable pack that serves two to four persons, contains eight 25g dumplings, a 20g sachet of sweet and sour sauce and a 20g sachet of soya sauce, and features a consumer competition.

Claims:
Microwaveable, Ethical - Environmentally Friendly Package

ProTings Sea Salt Flavor Protein Chips (Brazil)

ProTings Chips de Proteína Sabor Sal Marinho (Sea Salt Flavor Protein Chips) are now available. These baked snacks are suitable for vegans and provide 15 grams of protein and 120 calories. This kosher certified product is free from gluten and GMOs, can be enjoyed on-the-go and retails in a 28g pack.

Claims:
Kosher, Gluten-Free, Low/No/Reduced Allergen, Vegan, On-the-Go, No Animal Ingredients, GMO-Free

My Best Veggie Vegetarian Schnitzel Cordon Bleu Style (Germany)

My Best Veggie Vegetarische Schnitzel Nach Art Eines Cordon Bleu (Vegetarian Schnitzel Cordon Bleu Style) is now available. This product is made from a wheat and soya protein base and is described as meat free chops filled with meat free ham and melting cheese, then coated in breadcrumbs. The product retails in a 200g pack featuring the European Vegetarian Union logo.

Claims:
Vegetarian

Source: Mintel (2016)

Australian Green Peas Launches:
L3M (January – March 2016)

Trade Mark Coconut Collective Organic Coconut Milk

Trade Mark Coconut Collective Organic Coconut Milk is free from soy, dairy, cholesterol, gluten and lactose. The delicious drink features a creamy texture, and is perfect with cereal, in tea and coffee, or as a refreshing beverage. The kosher and halal certified product is a good source of calcium, and retails in a 1L recyclable pack featuring the EU Green Leaf logo and a Facebook link.

Claims:
Low/No/Reduced Cholesterol, Kosher, Organic, Halal, Gluten-Free, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Package, Low/No/Reduced Lactose, Social Media

The Happy Sol Food Company Super Greens+ Detox Blend

The Happy Sol Food Company Super Greens+ Detox Blend is described as the go-to alkalising blend with added probiotics. It contains seven shades of detoxifying green blended with a rainbow of fruits, coconut water and pea protein, plus a healthy punch of prebiotics and probiotics to provide a supergreen nutritional boost to start the day the healthy way. It can just be added to a favourite coconut water, smoothie or spring water with lemon for an on-the-go detox boost.

Claims:
No Additives/Preservatives, All Natural Product, Low/No/Reduced Sugar, Organic, Gluten-Free, Digestive (Functional), Low/No/Reduced Allergen, Vegan, On-the-Go, Ease of Use, No Animal Ingredients, GMO-Free, Social Media

Pulsin' Maple & Whey Crisp Protein Snack Bar

Pulsin' Maple & Whey Crisp Protein Snack Bar is natural and high in protein. The product contains 15g of protein and features a low glycemic index. It is suitable for vegetarians, contains no GMOs, and is gluten-free. According to the manufacturer, it is made using renewable energy and gently prepared at a low temperature, and retails in a 50g pack, featuring the QR code.

Claims:
Vegetarian, Low/No/Reduced Glycemic, Gluten-Free, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Product, High Protein, GMO-Free

Source: Mintel (2016)

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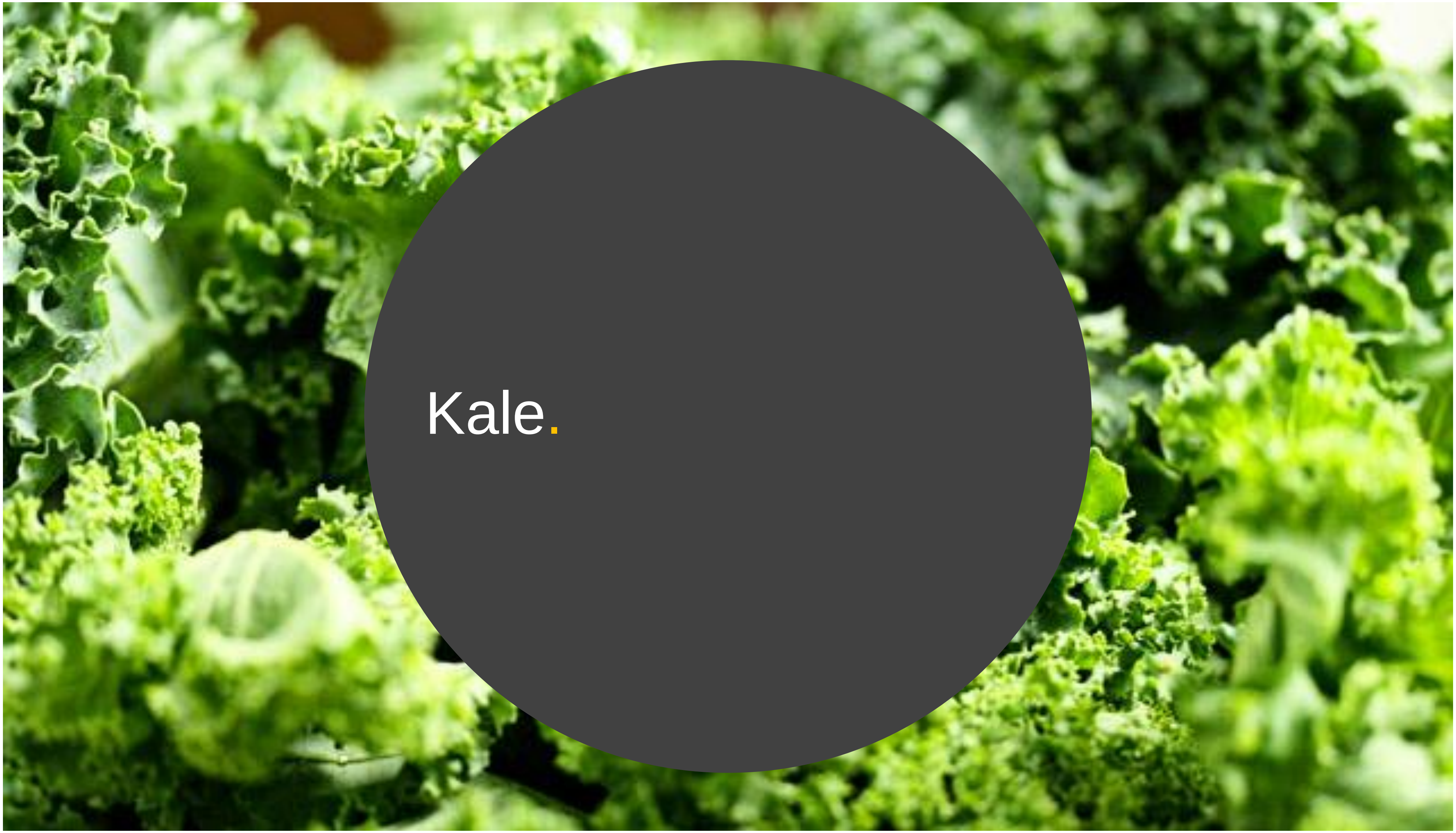


Kale.

Average purchase and consumption of kale have remained relatively consistent this wave.

Kale is typically purchased from mainstream retailers. This wave sees a noticeable increase in purchase from specialist retailers.

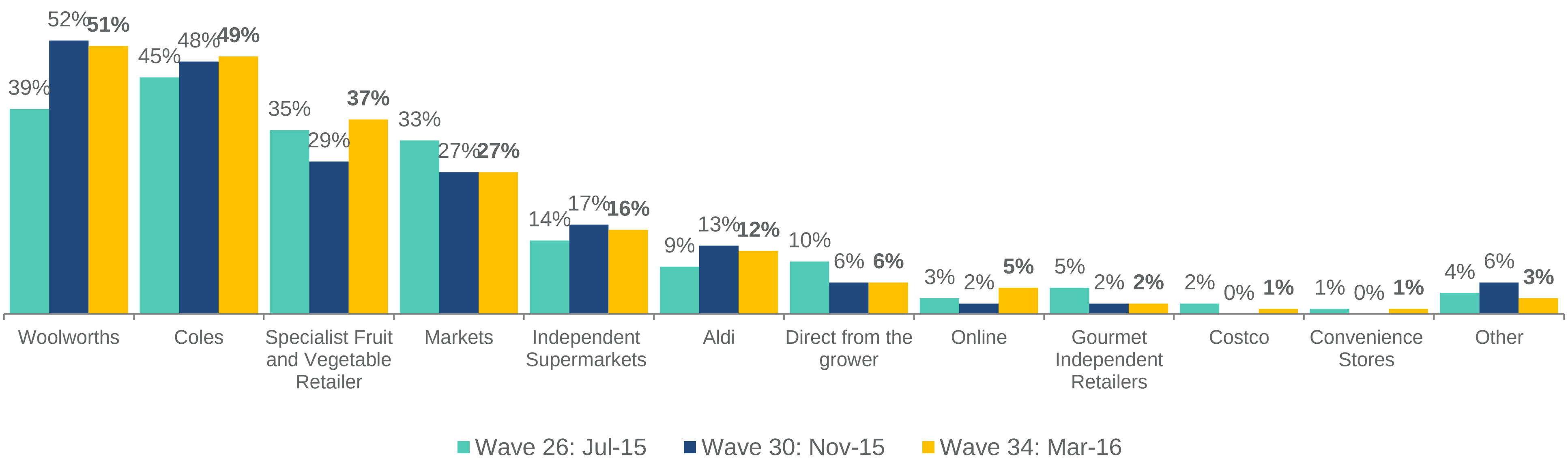
Average Purchase **4.2** times per month

▼ 4.1 times, Wave 26
▲ 4.3 times, Wave 30

Average Consumption **9.0** times per month

▲ 8.8 times, Wave 26
▲ 9.4 times, Wave 30

Purchase Channels



Q1. On average, how often do you purchase kale?
Q2. On average, how often do you consume kale?
Q5. From which of the following channels do you typically purchase kale?
Sample Wave 26 N=200, Wave 30 N=205, Wave 34 N=202

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

Average Spend and Price Sensitivity.

Average weight of purchase

The average consumer typically purchases **700g** of kale, a slight increase from the previous wave.

- 700g, Wave 26
- ▼ 600g, Wave 30

Recalled last spend

Recalled last spend on kale is **$4.20**, increasing from the last wave.

- ▲ $4.60, Wave 26
- ▼ $3.80, Wave 30

Value for money

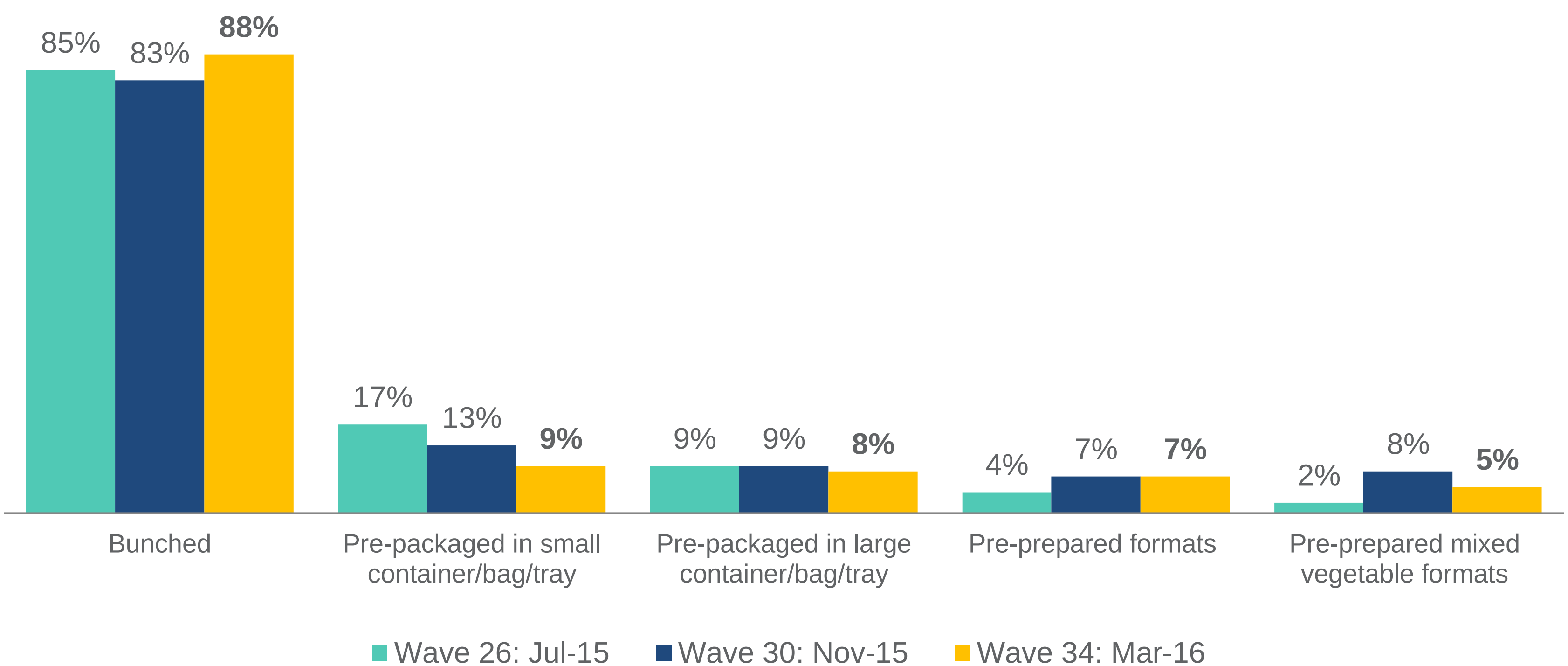
Consumers perceived kale to be fair value for money **(6.0/10)**, which has continued to decrease this wave.

- ▲ 6.5/10, Wave 26
- ▲ 6.1/10, Wave 30

Q3. How much kale do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 26 N=200, Wave 30 N=205, Wave 34 N=202

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

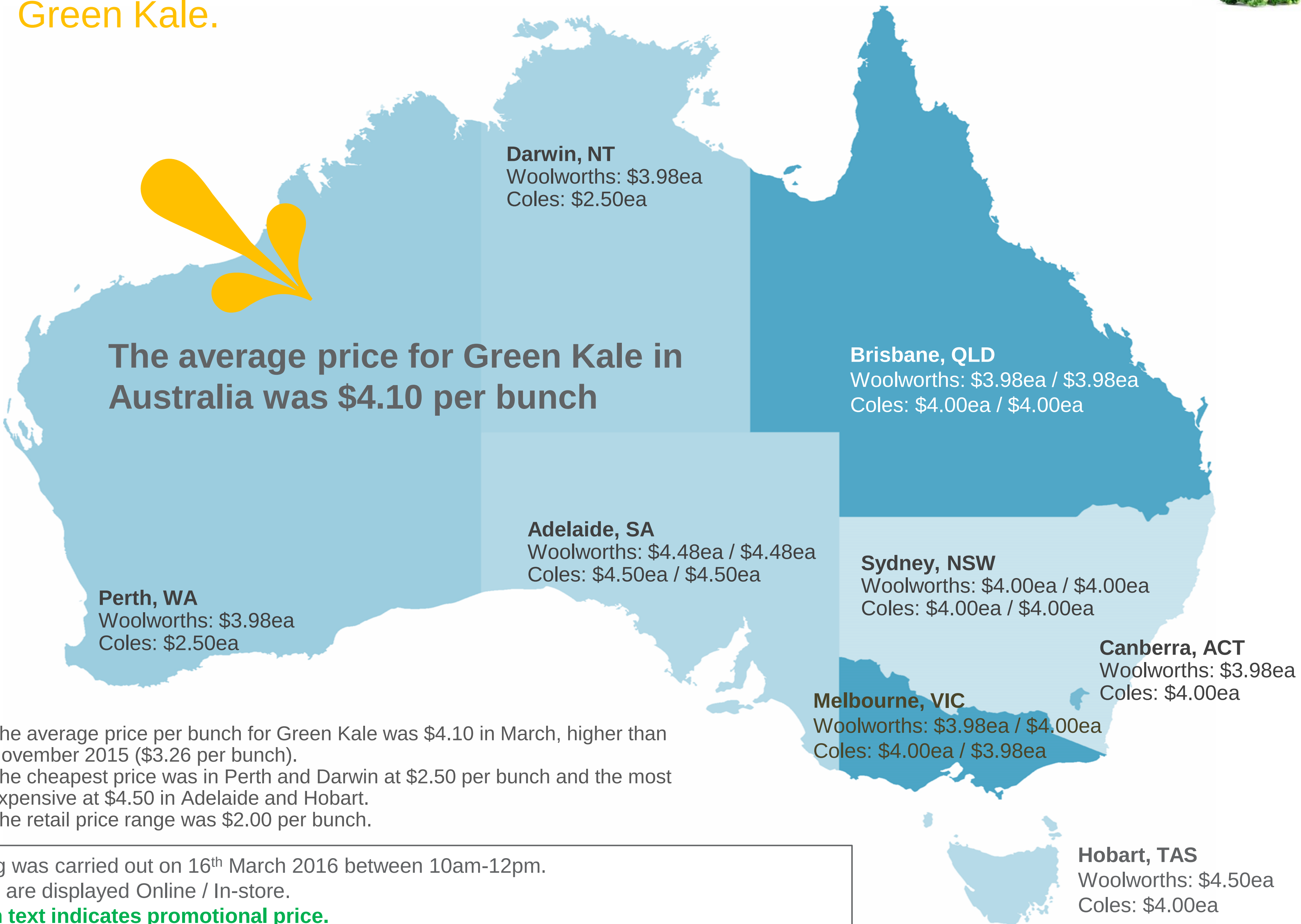
Bunched kale is the most common purchase format, consistent with previous waves.



Q4b. In what fresh formats do you typically purchase kale?
Sample Wave 26 N=200, Wave 30 N=205, Wave 34 N=202

Online and In-store Commodity Prices.

Green Kale.



- The average price per bunch for Green Kale was $4.10 in March, higher than November 2015 ($3.26 per bunch).
- The cheapest price was in Perth and Darwin at $2.50 per bunch and the most expensive at $4.50 in Adelaide and Hobart.
- The retail price range was $2.00 per bunch.

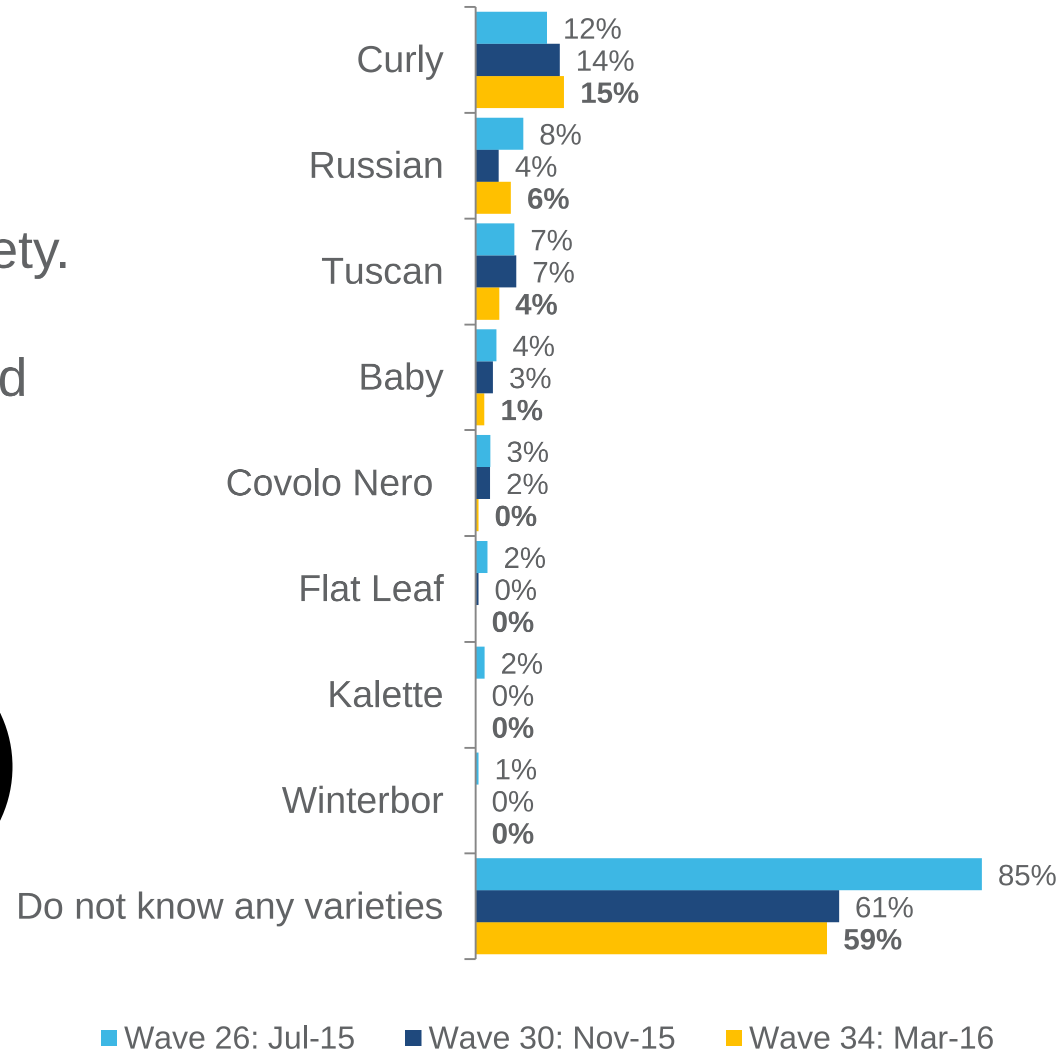
Pricing was carried out on 16th March 2016 between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates promotional price.

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

This wave sees greater recall based on colour.

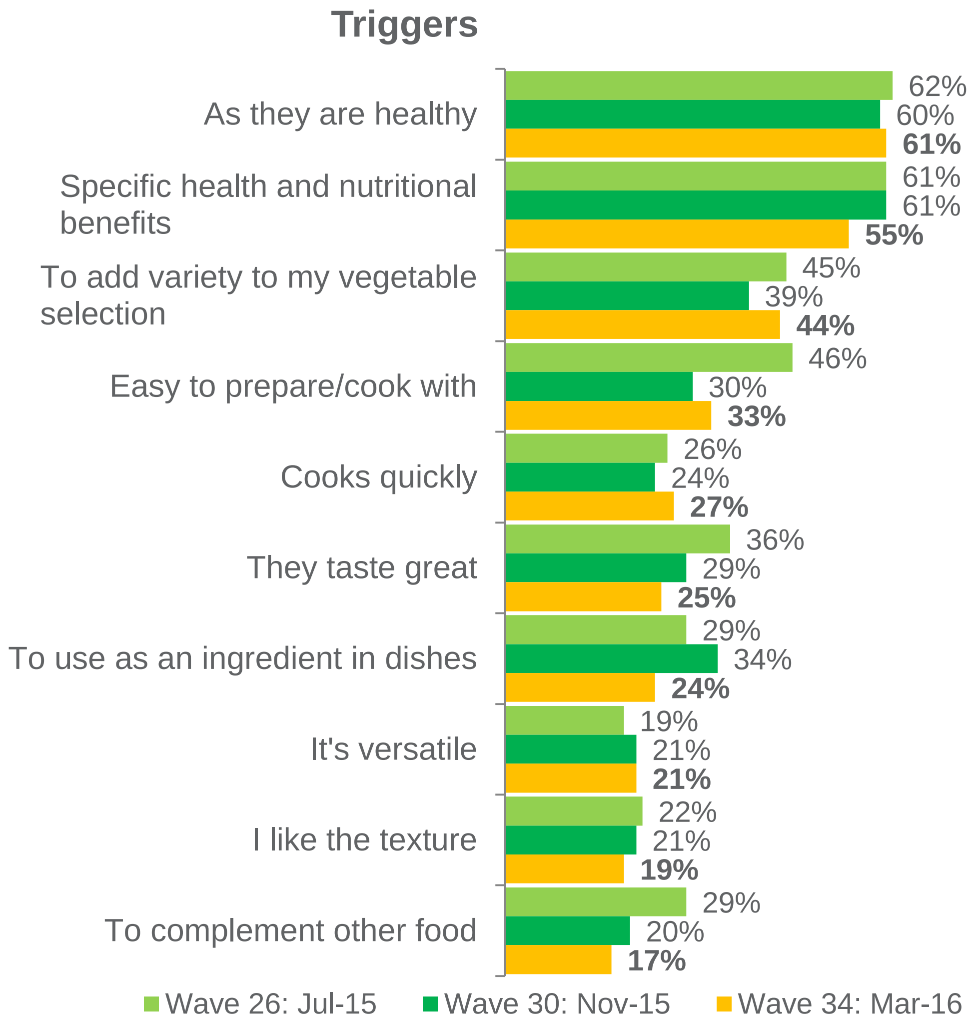
Green	Purple	Red	Black
17%	8%	9%	2%

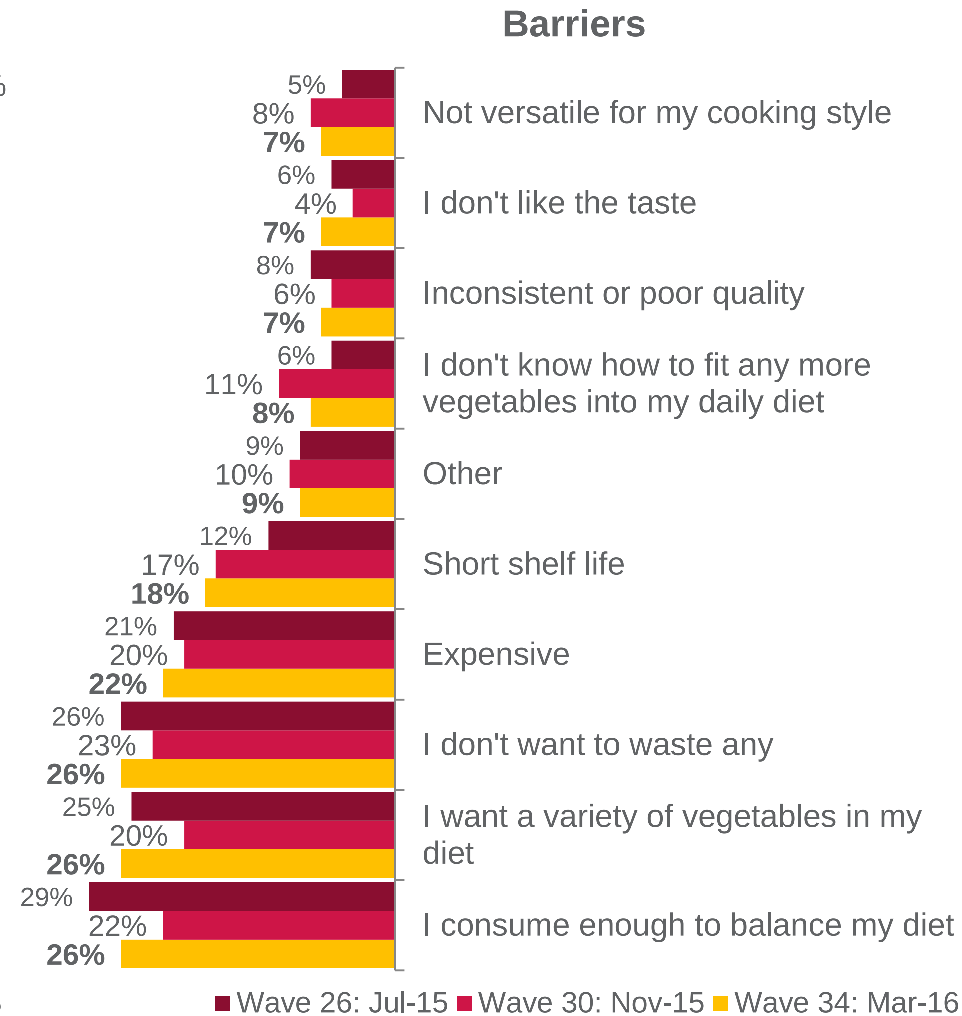
Colour recall for kale types



Q6a. What varieties of kale are you aware of? (unprompted)
Sample Wave 26 N=200, Wave 30 N=205, Wave 34 N=202

The key drivers of purchase for kale are health related due to its specific health and nutritional benefits. This wave sees a continuous decline in taste and complementing other food as triggers to purchase. In contrast, already consuming enough is the key barrier to purchase.





Q7. Which of the following reasons best describes why you purchase kale?
Q8. Which reason best describes why you don't buy kale more often?
Sample Wave 26 N=200, Wave 30 N=205, Wave 34 N=202

Australian and Chinese cuisine are popular for kale dishes, consistent with past waves.

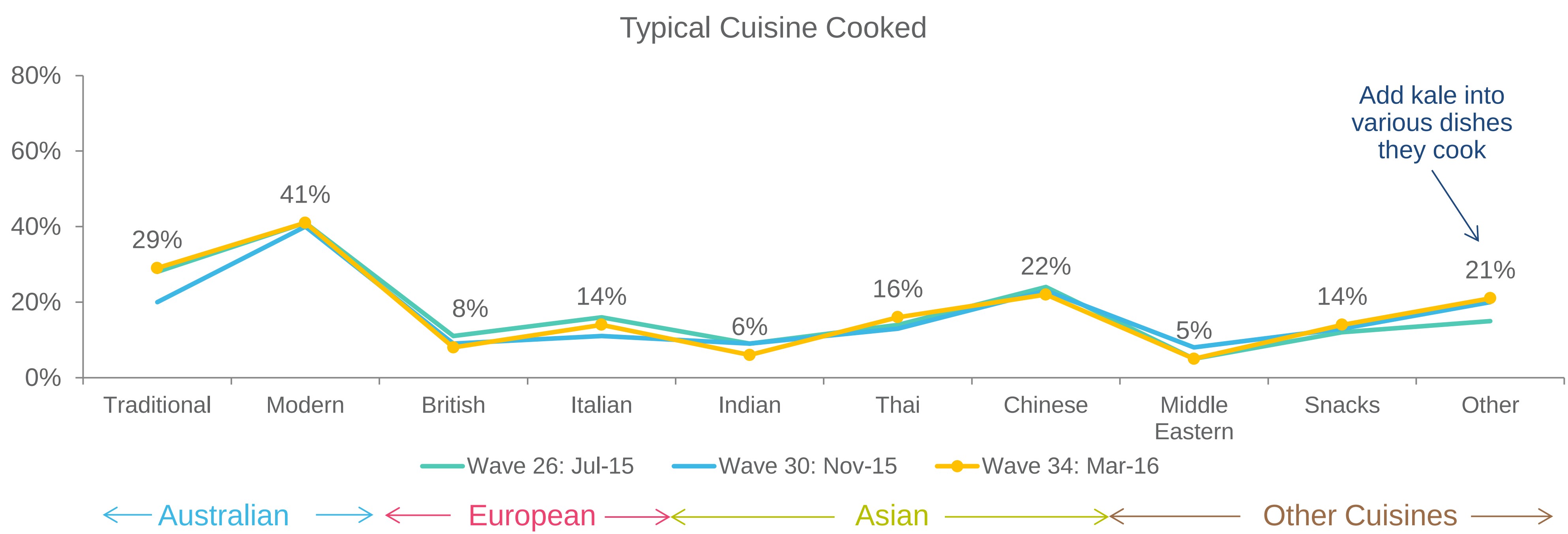
Meal occasions tend to occur during dinner and family meals.

Top 5 Consumption Occasions

	Wave 30	Wave 34
Dinner	57%	**51%**
Family Meals	37%	**47%**
Weekday Meals	29%	**33%**
Quick Meals	31%	**32%**
Weekend Meals	22%	**24%**

20% used kale when cooking a new recipe

▼ 18%, Wave 30



Q10. What cuisines do you cook/consume that use kale?
Q11. Which of the following occasions do you typically consume/use kale?
Sample Wave 26 N=200, Wave 30 N=205, Wave 34 N=202

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

Consumers prefer to use kale mainly with carrots, onions and potatoes. Kale is generally steamed, eaten raw or cooked in stir fries.

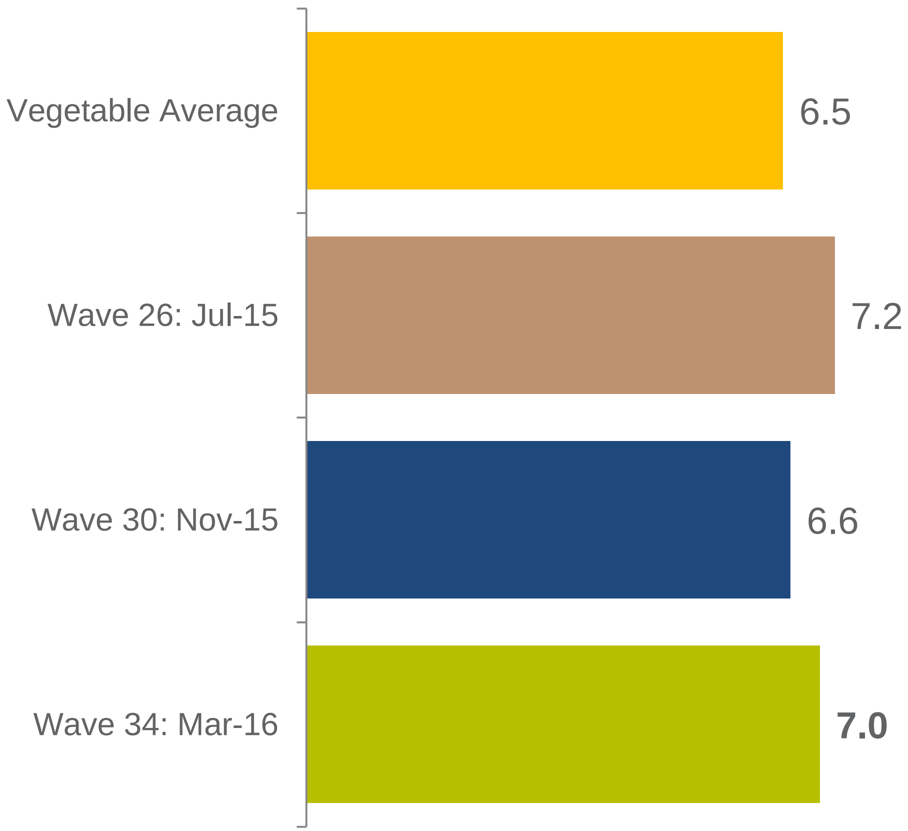
Accompanying Vegetables

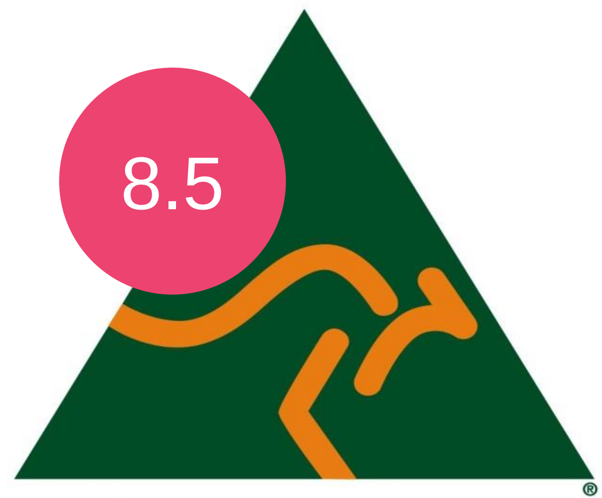
Carrot	41% ▲
Onion	32% ▲
Potato	26% –
Tomato	26% ▼
Capsicum	24% ▲

Top 10 Cooking Styles			
	Wave 26	Wave 30	Wave 34
Steaming	34%	39%	**40%**
Raw	26%	31%	**36%**
Stir frying	42%	39%	**36%**
Soup	21%	19%	**18%**
Boiling	19%	15%	**16%**
Sautéing	22%	22%	**16%**
Other	10%	17%	**14%**
Roasting	10%	13%	**13%**
Slow Cooking	9%	8%	**12%**
Baking	10%	11%	**10%**

Q9. How do you typically cook kale?
Q10a. And when are you serving kale which of the following do you also serve together with this?
Sample Wave 26 N=200, Wave 30 N=205, Wave 34 N=202

This wave sees an increase in the importance of kale provenance. Knowing that kale is grown in Australia is highly important information for consumers.



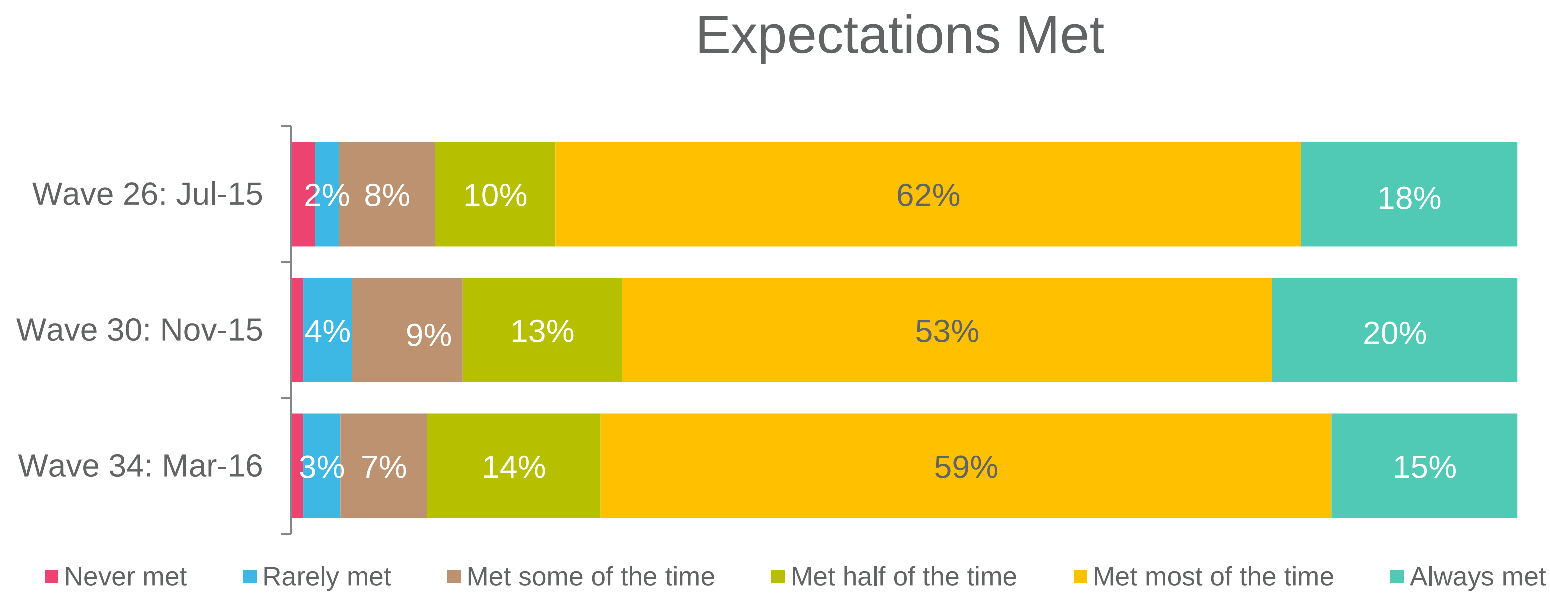


Q14. When purchasing kale, how important is Provenance to you?
Q15. And when purchasing Kale, how important is that it is grown in Australia?
Sample Wave 26 N=200, Wave 30 N=205, Wave 34 N=202

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

Expected to stay fresh for **7.0** days

▼ 6.1 days, Wave 26
▼ 6.8 days, Wave 30



Q12. How long do you expect kale to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy kale?
Sample Wave 26 N=200, Wave 30 N=205, Wave 34 N=202

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

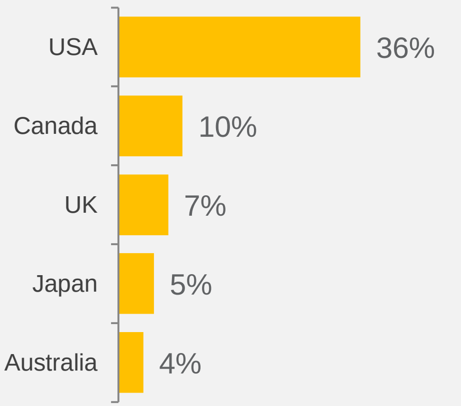
Kale Product Launch Trends.

Kale Global Launches

January – March 2016

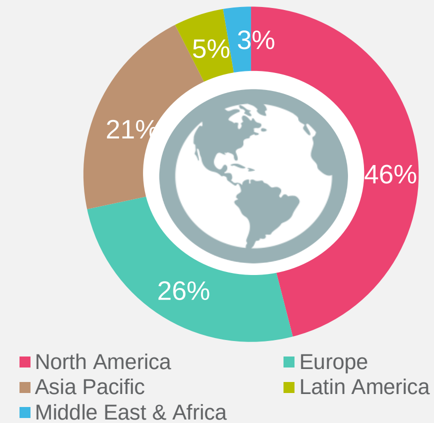
There were 187 kale products launched globally over the last three months. The majority of launches were in USA and Canada. Categories for launches were snacks and juice drinks. Key packaging for kale products were in flexible packaging and bottles.

Country

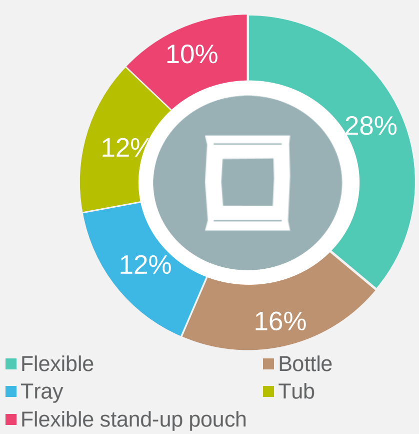


187 Global NPDs

Region



Top Pack Formats



Categories

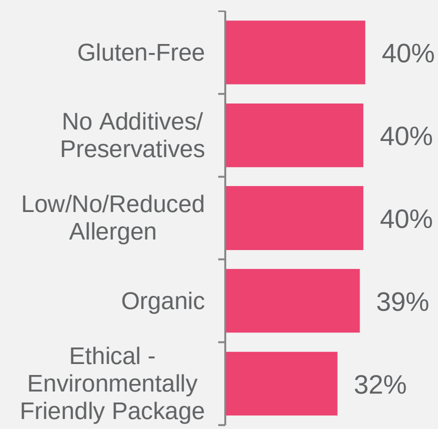
Snacks 25%

Juice Drinks 21%

Meals 17%

Fruits & Vegetables 10%

Top Claims



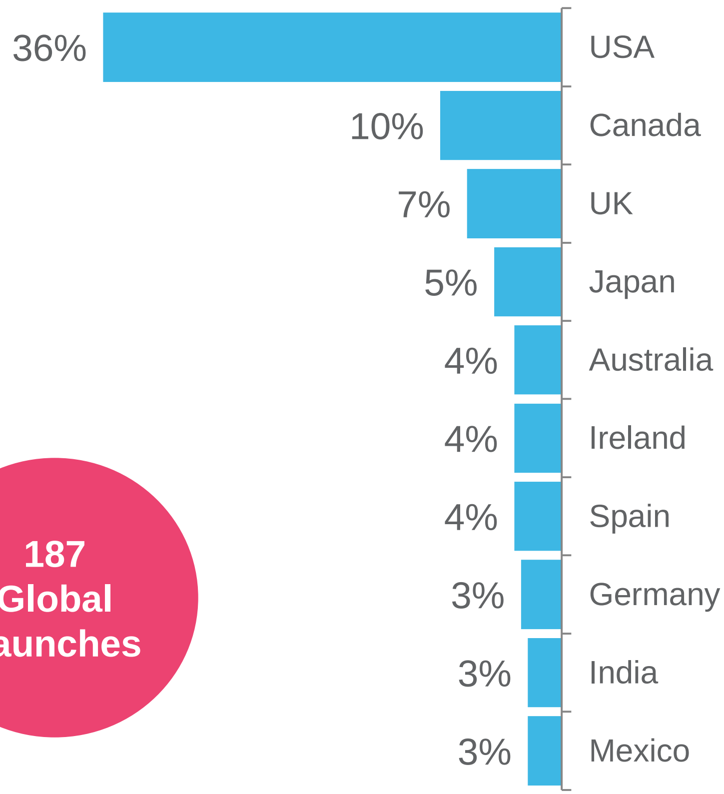
Kale Product Launches:
Last 3 Months (January – March 2016)
Summary

- There were 187 launches in the past 3 months globally that contained kale as an ingredient.
- There were 7 products launched in Australia over the past three months.
- North America (46%) and Europe (26%) were the key regions for launches.
- Flexible packaging (28%) and bottles (16%) were the most common formats used for products.
- The main categories for launches were snacks (25%), juice drinks (21%), and meals (17%).
- Claims used on products highlighted health; gluten free (40%), no additives/preservatives (40%), and low/no/reduced allergen (40%).
- The most innovative product launched was Organic Kale Powder in New Zealand. More examples can be found in the following pages.

Source: Mintel (2016)

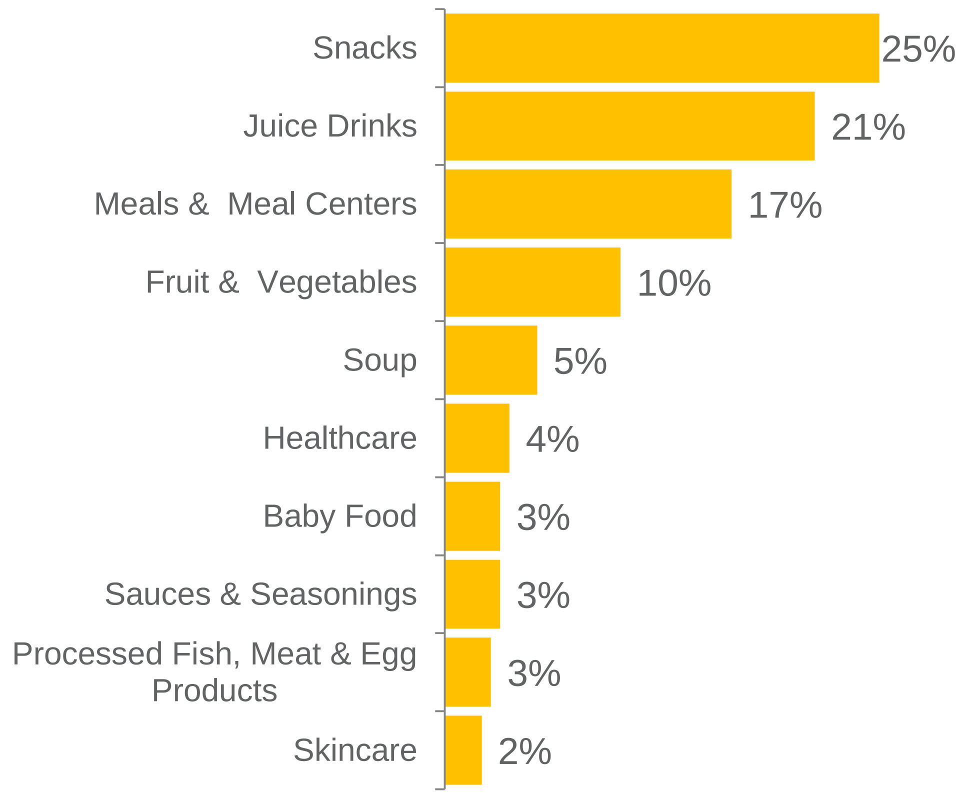
The majority of kale launches occurred in USA and Canada. The key categories for kale launches are snacks, juice drinks, meals, and fruits & vegetables, relatively consistent with the previous wave.

Top Launch Countries



187 Global Launches

Top Launch Categories



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The main claims globally were gluten free, no additives & preservatives, and low/no/reduced allergen. Flexible and bottle packaging are primarily used for kale products.

Pack Formats Used

Global	Flexible	28%
Global	Bottle	16%
Global	Tray	12%
North America	Flexible	30%
North America	Bottle	17%
North America	Tray	15%
Europe	Flexible	31%
Europe	Bottle	21%
Europe	Tub	13%

Top Claims Used

Global	Gluten-Free	40%
Global	No Additives/Preservatives	40%
Global	Low/No/Reduced Allergen	40%
North America	Gluten-Free	53%
North America	Low/No/Reduced Allergen	52%
North America	Organic	49%
Europe	Organic	40%
Europe	Ethical - Environmentally Friendly Package	40%
Europe	Gluten-Free	29%

Only regions with n >30 are displayed

Innovative Kale Launches:
L3M (January – March 2016)

Sukin Super Greens Detoxifying Facial Scrub (Singapore)

Sukin Super Greens Detoxifying Facial Scrub, suitable for all skin types, is made with a blend of kale, spirulina, chlorella and parsley to promote a healthy, glowing complexion, imparting detoxifying antioxidants and vitamins on the skin, whilst jojoba beads and bamboo are said to gently exfoliate. Pineapple, licorice and lime peel are said to promote a clear, radiant complexion, and a burst of cranberry is said to provide an invigorating scent to refresh the senses.

Claims:
No Additives/Preservatives, Vitamin/Mineral Fortified, Aromatherapy, Botanical/Herbal, Antioxidant, Exfoliating, Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Ethical - Animal, Brightening / Illuminating*, Paraben Free, Vegan, No Animal Ingredients, Carbon Neutral, Sulphate/Sulfate Free, Mineral Oil/Petroleum Free

El Granero Integral Plus Organic Kale Food Supplement (Germany)

El Granero Integral Plus Organic Kale Food Supplement is now available. This organic product is high in fiber, and contains vitamins A, K, C and B9 and minerals such as calcium, iron and potassium. It is a source of protein, and helps to eliminate the liquids in the body. Furthermore, this supplement acts as a natural anti-acidic due to its high content of glutamin, and retails in a 200g pack. The product was on display at Biofach 2016 in Nuremberg, Germany.

Claims:
Other (Functional), Organic, Botanical/Herbal, Digestive (Functional)

Supereats Chili Lime Kale + Chia Chips (USA)

Supereats Chili Lime Kale + Chia Chips are described as deliciously crispy, super tasty and super nutritious snacks made with kale, which is low in calorie and packed with vitamin A, vitamin C, calcium, Omega-3 and important antioxidants, and chia seeds, a prized possession of the Mayans, Incas and Aztecs for their protein, fiber and omega 3.

Claims:
No Additives/Preservatives, Low/No/Reduced Calorie, Kosher, Gluten-Free, Low/No/Reduced Transfat, Antioxidant, Low/No/Reduced Allergen, Vegan, No Animal Ingredients, GMO-Free

Organics Happy Baby Superfood Munchies Broccoli, Kale & Cheddar Baked Cheese & Grain Snack (USA)

Organics Happy Baby Superfood Munchies Broccoli, Kale & Cheddar Baked Cheese & Grain Snack has been relaunched with a new name, previously known as Happy Baby Happy Munchies. The kosher and USDA organic certified product contains 3g wholegrain, 32mg choline to support brain and eye health and nine essential vitamins and minerals.

Claims:
Other (Functional), Kosher, Organic, Babies & Toddlers (0-4), Gluten-Free, Antioxidant, Wholegrain, Brain & Nervous System (Functional), Low/No/Reduced Allergen, Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Ethical - Human, GMO-Free

Source: Mintel (2016)

Innovative Kale Launches:
L3M (January – March 2016)

Sweet Earth Natural Foods Tuscan Veggie Sausage (USA)

Sweet Earth Natural Foods Tuscan Veggie Sausage is now available. This vegan, all natural, microwaveable, sustainable, cruelty-free, vegetarian, product is described as plant-based patties made with fennel, rosemary, kale, and barley for rustic, hearty flavor. It features 67% less fat and 60% less sodium than pork sausage, 0g of cholesterol and 15g of protein. It is high in protein, free from nitrate and antibiotics and retails in an 8-oz. recyclable, pack comprising four units.

Claims:
No Additives/Preservatives, All Natural Product, Low/No/Reduced Cholesterol, Low/No/Reduced Fat, Microwaveable, Low/No/Reduced Sodium, Vegetarian, Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Ethical - Animal, Vegan, High Protein, Social Media

Tio Gazpacho Organic Gazpacho Verde Chilled Vegetable Soup (USA)

Tio Gazpacho Organic Gazpacho Verde Chilled Vegetable Soup comprises tomato, green pepper, cucumber, avocado, kale, spinach, red onion, jalapeno pepper, mint, garlic, olive oil and apple cider vinegar. The vegan and USDA Organic certified soup is high pressure processed and never heated, and does not require a bowl but can be drank straight from the bottle. The product retails in a 12-fl. oz. recyclable pack and the manufacturer states they donate 5 cents per bottle to Development in Gardening.

Claims:
Organic, Ethical - Environmentally Friendly Package, Ethical - Charity, Vegan, Ease of Use, No Animal Ingredients

CleverFoodies Scramble Leafy Greens Mix-In for Scrambled Eggs, Omelets & Frittatas (USA)

CleverFoodies Scramble Leafy Greens Mix-In for Scrambled Eggs, Omelets & Frittatas is now available. It comprises spinach, kale, tomato, broccoli rabe and garlic, and is described as an all natural mix to prepare fast and delicious scrambled eggs, omelets and frittatas. This vegetarian product provides 60 calories per serving, and is free of gluten, preservatives and added sugar.

Claims:
No Additives/Preservatives, All Natural Product, Low/No/Reduced Sugar, Microwaveable, Vegetarian, Gluten-Free, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Package, Time/Speed, Ease of Use, Social Media

GoodFoods Garden Greens Spinach and Kale Dip (USA)

GoodFoods Garden Greens Spinach and Kale Dip comprises spinach, kale, artichokes and rBST-free Greek yogurt. It contains 40 calories and 2g fat per serving and is free from artificial colors, flavors and gluten. The high-pressure processed product retails in an 8-oz. pack featuring the Facebook, Twitter and Instagram logos.

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

Source: Mintel (2016)

Innovative Kale Launches:
L3M (January – March 2016)

AH Kale Stew (Netherlands)

AH Stamppot Boerenkool (Kale Stew) has been relaunched with a new 550g pack design and a new formula which now once again features smoked sausage. It comprises creamy freshly mashed potatoes, mustard gravy and fried bacon. This product is free from gluten, artificial fragrances and flavours, and can be prepared in the microwave.

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

Pacific Northwest Kale Chips Cheezy Crunch Kale Chips (USA)

Pacific Northwest Kale Chips Cheezy Crunch Kale Chips have been repackaged with a new packaging design. This raw, USDA-certified organic product is described as the ultimate in plant-based snack and is made of locally sourced, organic raw kale along with vegan sunflower cheddar. These kale chips have been air-dried at 112 degrees and utilize real, superfood ingredients.

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

Go Superfood Organic Kale Powder (New Zealand)

Go Superfood Organic Kale Powder packs a powerful punch of nutrients, including vitamins A and C, iron, calcium, potassium and magnesium. Kale is said to aid healthy digestion and provides the body with antioxidant protection as well as fibre and essential nutrients for everyday good health. The 100% pure kale can be added to cooking, smoothies, juices and salads to energise and super charge the immune health.

Claims:
No Additives/Preservatives, Other (Functional), Low/No/Reduced Sugar, Organic, Gluten-Free, Antioxidant, Digestive (Functional), Immune System (Functional), Low/No/Reduced Allergen

Chungjungone Smart Bab & En Seafood Rice Sprinkles (South Korea)

Chungjungone Smart Bab & En Seafood Rice Sprinkles contain seven vegetables and seafood. This product retails in a 24g pack containing 3 x 8g units.

Claims:
N/A

Source: Mintel (2016)

Australian Kale Launches:
L3M (January – March 2016)

M.E.B. Foods Superfoods Chia, Spinach, Kale & Broccoli Organic Wraps

M.E.B. Foods Superfoods Chia, Spinach, Kale & Broccoli Organic Wraps are now available. According to the manufacturer, spinach contains more nutrients than any other food on earth; and is loaded with vitamins A, K, D, E and other trace minerals. It is a good source of omega-3 fatty acids and contains anti-cancer and anti-inflammatory antioxidants and alkalizes the body.

Claims:
High/Added Fiber, Other (Functional), Microwaveable, Organic, Vitamin/Mineral Fortified, Antioxidant, Bone Health, High Protein, Social Media

Simmone Logue Fine Food Beef Bean Empanada

Simmone Logue Fine Food Beef Bean Empanada is said to be handmade with love. This product retails in a pack containing two 140g units.

Claims:
N/A

Sukin Super Greens Nourishing Chia Seed Oil +

Sukin Super Greens Nourishing Chia Seed Oil + is a daily face oil blend that is said to provide a hydrated and healthy complexion with a rich perfect balance of omega 3 and 6, chia oil, minerals, antioxidants and amino acids to target fine lines and reinforce the skin's moisture barrier.

Claims:
No Additives/Preservatives, Botanical/Herbal, Antioxidant, Anti-Ageing, Ethical - Animal, Moisturising / Hydrating, Reduces Fine Lines / Wrinkles*, Paraben Free, Vegan, No Animal Ingredients, Carbon Neutral, Sulphate/Sulfate Free, Mineral Oil/Petroleum Free

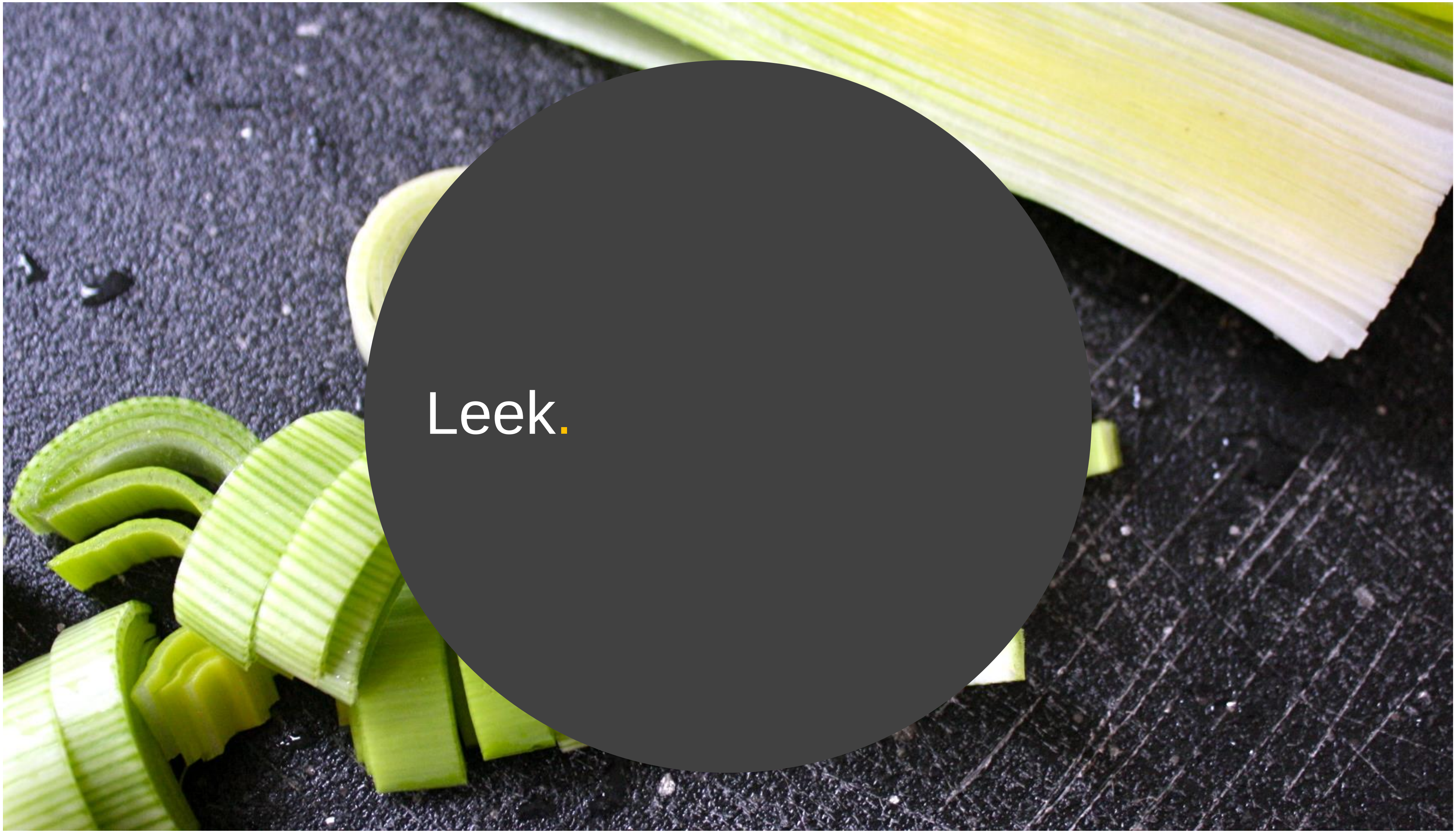
Woolworths Created with Jamie Gorgeous Green Garden Pea & Quinoa Dip

Sweet Potato, Waters, Peas, Spinach, Quinoa, Cucumber, Extra Virgin Olive Oil, Kale, Lemon Juice, Mint, Salt, Acetic Acid, Garlic, Basil, Chlorophylls

Claims:
No Additives/Preservatives

Source: Mintel (2016)

Leek.



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

There is an upwards trend in purchase from Coles, whereas purchase from Woolworths has declined over the last three waves.

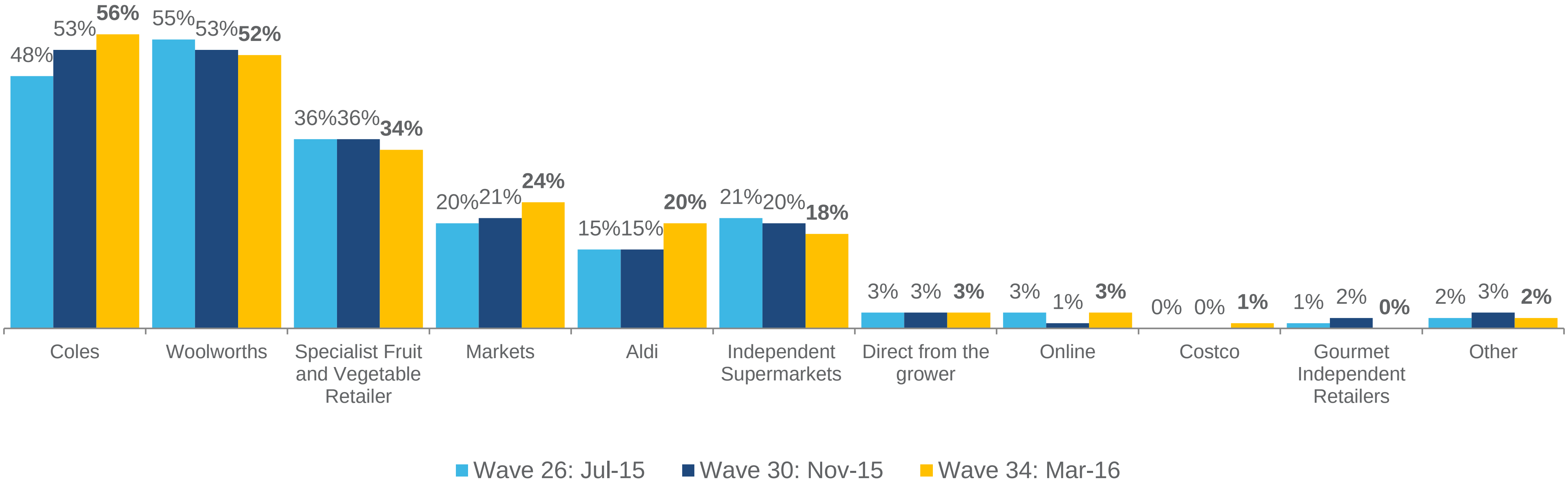
Average Purchase **2.2** times per month

▼ 2.2 times, Wave 26
▲ 2.4 times, Wave 30

Average Consumption **4.2** times per month

▼ 3.9 times, Wave 26
▲ 4.4 times, Wave 30

Purchase Channels



Q1. On average, how often do you purchase leeks?
Q2. On average, how often do you consume leeks?
Q5. From which of the following channels do you typically purchase leeks?
Sample Wave 26 N=206, Wave 30 N=204, Wave 34 N=202

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

Average Spend and Price Sensitivity.

Average weight of purchase

The average consumer typically purchases **700g** of leeks, slightly lower than the previous waves.

▲ 800g, Wave 26
▲ 800g, Wave 30

Recalled last spend

Recalled last spend on leeks was **$3.10**, lower than the past two waves.

▲ $3.30, Wave 26
▲ $3.50, Wave 30

Value for money

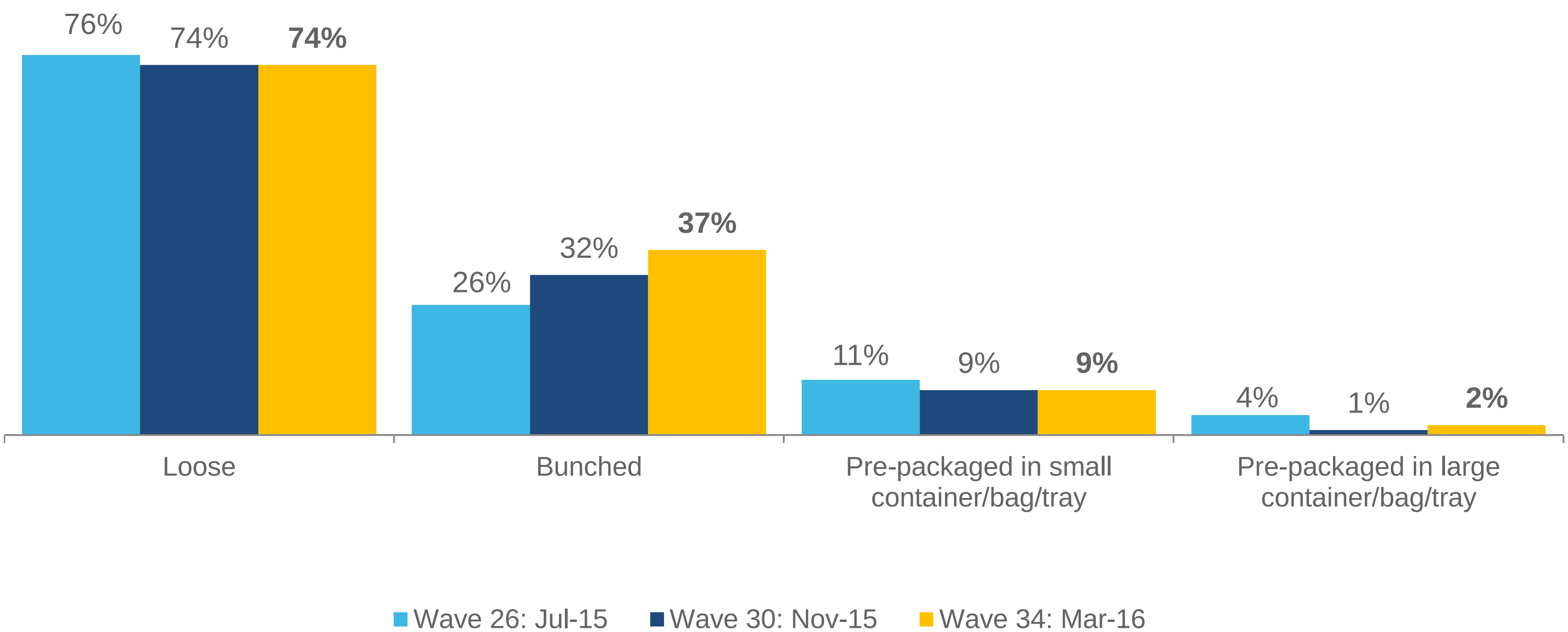
Consumers' perceived value for money is fair for leeks **(6.1/10)**.

▲ 6.2/10, Wave 26
▼ 6.0/10, Wave 30

Q3. How much leek do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 26 N=206, Wave 30 N=204, Wave 34 N=202

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

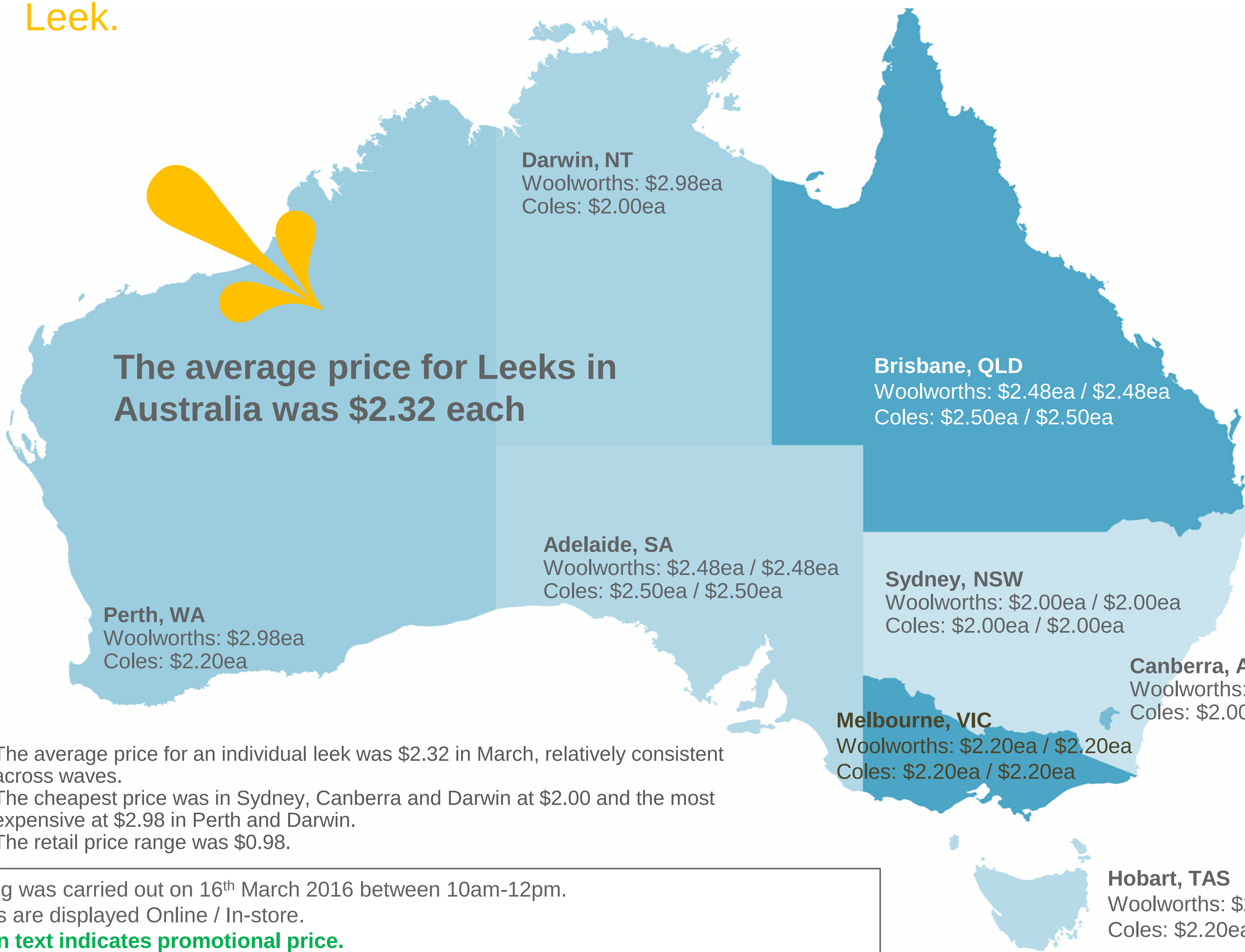
Individual leeks are the most common purchase format. Bunched leeks are another popular option and have increased in popularity over the last three waves.



Q4b. In what fresh formats do you typically purchase leeks?
Sample Wave 26 N=206, Wave 30 N=204, Wave 34 N=202

Online and In-store Commodity Prices.

Leek.



- The average price for an individual leek was $2.32 in March, relatively consistent across waves.
- The cheapest price was in Sydney, Canberra and Darwin at $2.00 and the most expensive at $2.98 in Perth and Darwin.
- The retail price range was $0.98.

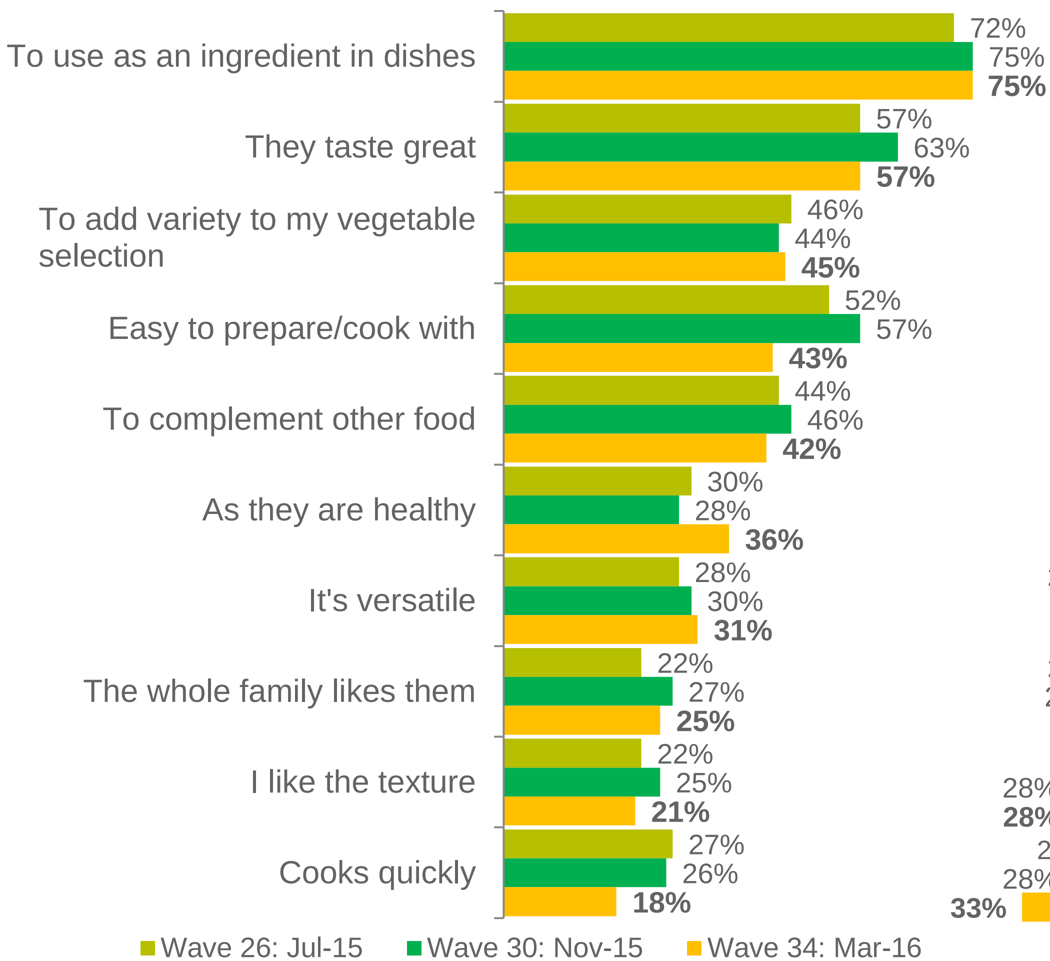
Pricing was carried out on 16th March 2016 between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates promotional price.

Awareness of leek varieties is low, with 85% of consumers unable to recall a type. This is consistent with past waves.

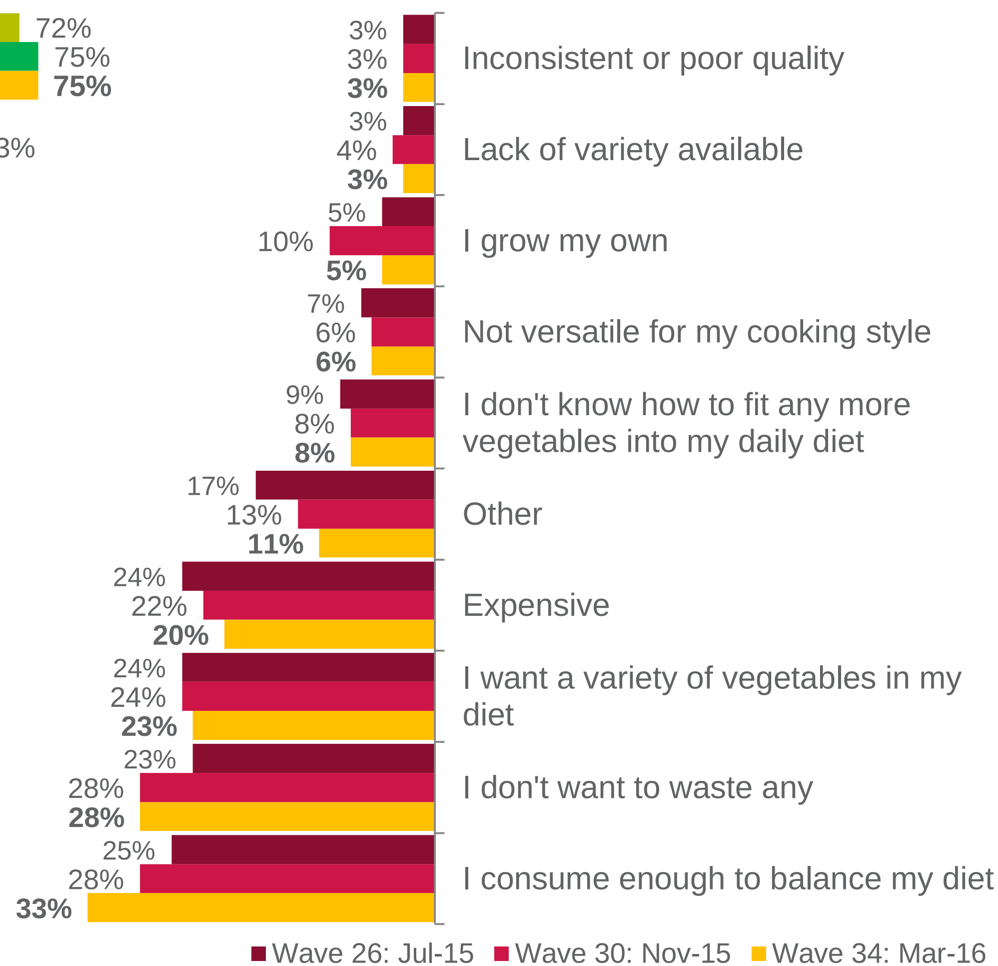
Q6a. What varieties of leek are you aware of? (unprompted)
Sample Wave 26 N=206, Wave 30 N=204, Wave 34 N=202

Using leeks as an ingredient in dishes, taste and adding variety are the key drivers of purchase. In contrast, the key barriers to purchase are already consuming enough to balance their diet and not wanting to waste any. This wave sees a noticeable increase in health as a trigger to purchase.

Triggers



Barriers



Q7. Which of the following reasons best describes why you purchase leeks?
Q8. Which reason best describes why you don't buy leeks more often?
Sample Wave 26 N=206, Wave 30 N=204, Wave 34 N=202

Australian, British and Chinese cuisines are most popular when cooking leeks.

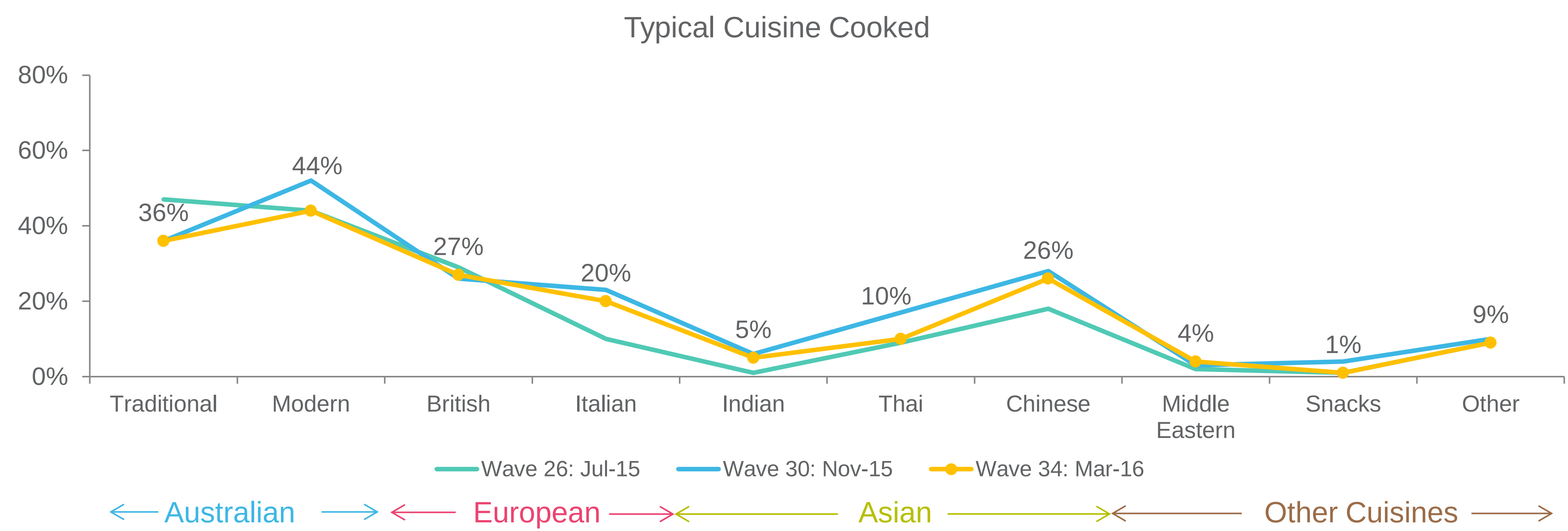
Meal occasions tend to occur during dinner. Approximately one quarter of consumers used leeks when cooking a new recipe.

Top 5 Consumption Occasions

	Wave 30	Wave 34
Dinner	70%	**69%**
Family meals	57%	**56%**
Weekday meals	39%	**42%**
Weekend meals	34%	**34%**
Quick meals	28%	**33%**

24% used leeks when cooking a new recipe

▲ 26%, Wave 30



Q10. What cuisines do you cook/consume that use leeks?
Q11. Which of the following occasions do you typically consume/use leeks?
Sample Wave 26 N=206, Wave 30 N=204, Wave 34 N=202

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

Consumers prefer to serve leeks with potatoes and carrots, consistent with past waves. Leeks are generally cooked in soups and stir fries.

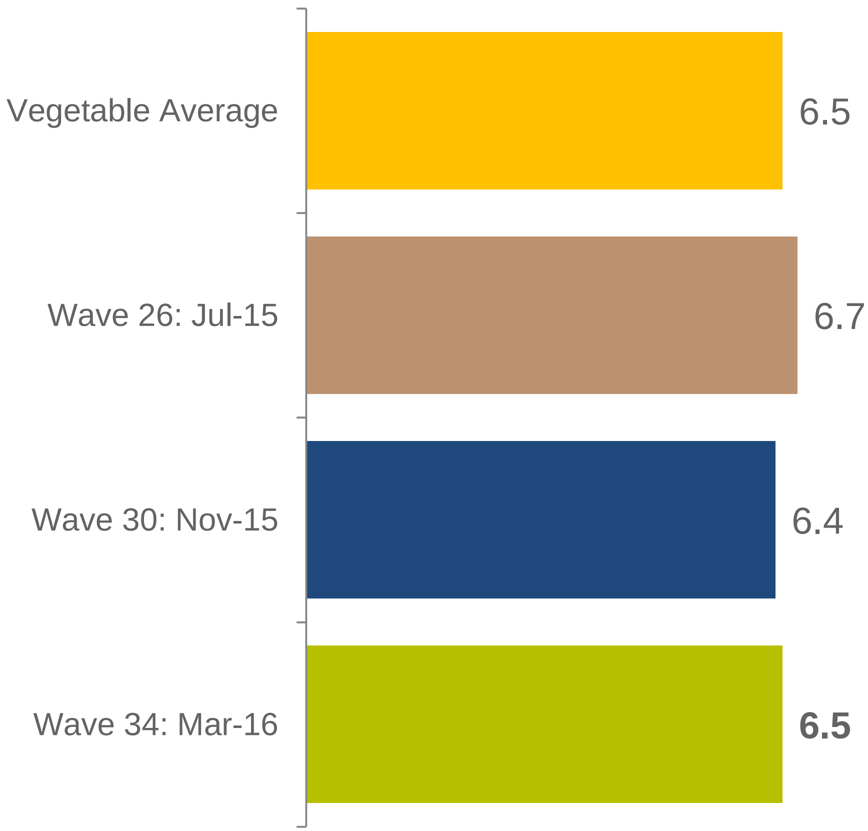
Accompanying Vegetables

Potato	54%
Carrot	43%
Onion	29%
Garlic	25%
Celery	24%

Top 10 Cooking Styles			
	Wave 26	**Wave 30**	**Wave 34**
Soup	68%	55%	**59%**
Stir frying	37%	45%	**44%**
Sautéing	33%	39%	**37%**
Slow Cooking	30%	23%	**30%**
Frying	22%	31%	**26%**
Steaming	17%	12%	**18%**
Roasting	8%	15%	**13%**
Boiling	12%	11%	**13%**
Baking	11%	15%	**12%**
Raw	4%	4%	**6%**

Q9. How do you typically cook leeks?
Q10a. And when are you serving leeks which of the following do you also serve together with this?
Sample Wave 26 N=206, Wave 30 N=204, Wave 34 N=202

This wave sees a slight increase in the importance of the provenance of leeks, sitting in line with the Vegetable Average.



8.4

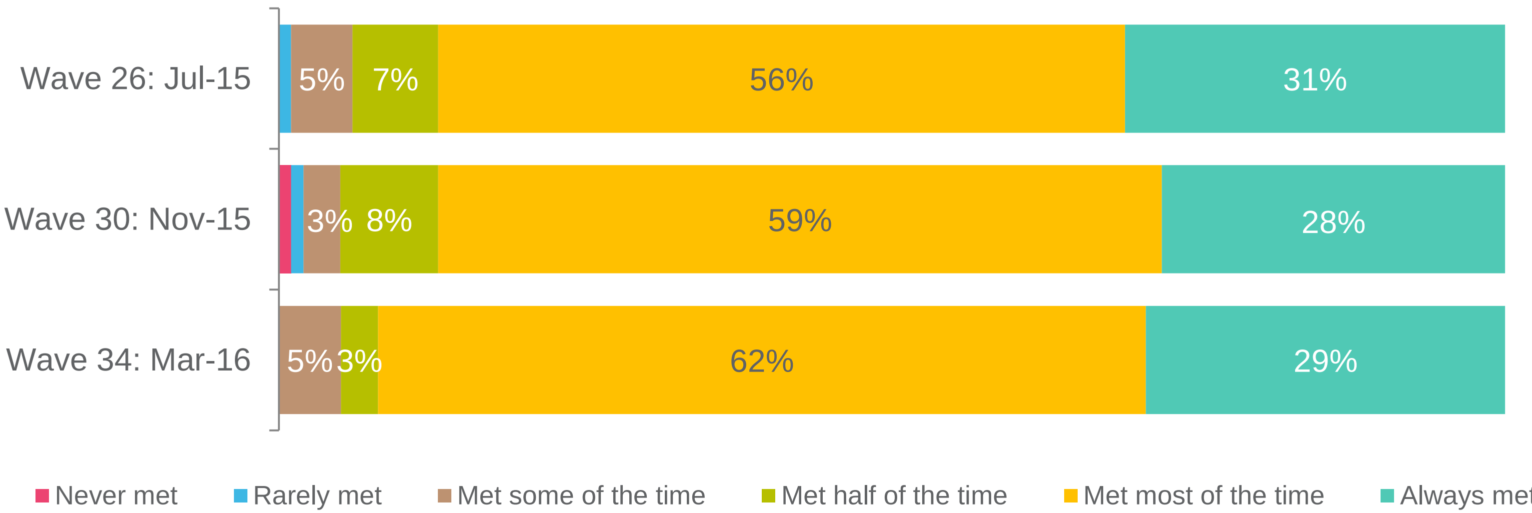
Q14. When purchasing leeks, how important is Provenance to you?
Q15. And when purchasing Leeks, how important is that it is grown in Australia?
Sample Wave 26 N=206, Wave 30 N=204, Wave 34 N=202

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

Expected to stay fresh for **8.7** days

▲ 8.9 days, Wave 26
▼ 8.6 days, Wave 30

Expectations Met



Q12. How long do you expect leeks to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy leeks?
Sample Wave 26 N=206, Wave 30 N=204, Wave 34 N=202

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

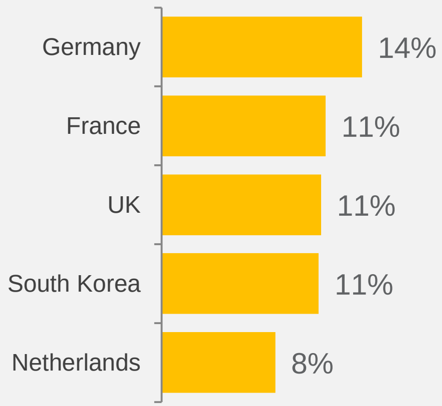
Leek Product Launch Trends.

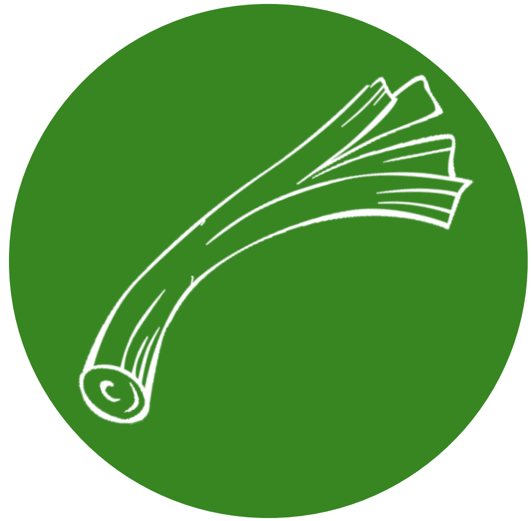
Leek Global Launches

January – March 2016

There were 641 leek products launched globally over the last three months. The majority of launches were in Germany and France. Categories for launches were meals and soups.

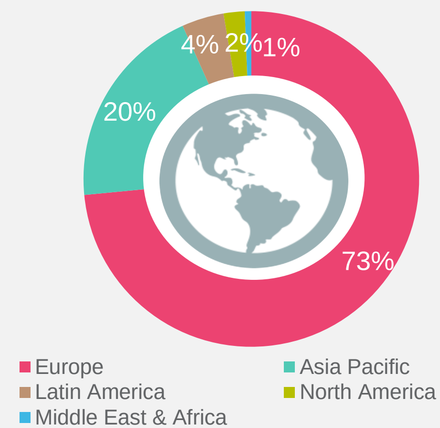
Country



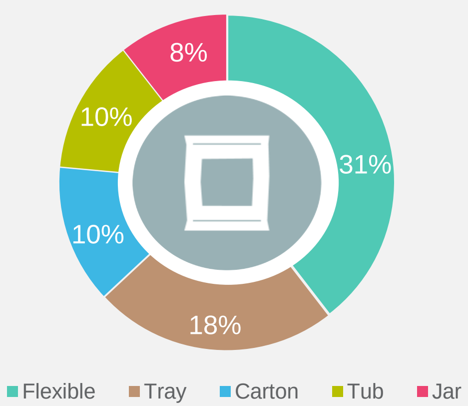


641 Global NPDs

Region



Top Pack Formats



Categories

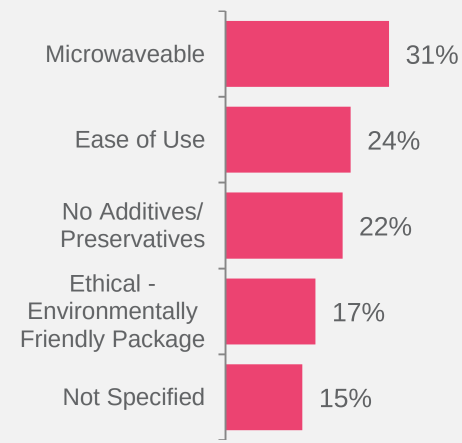
Meals 28%

Soup 18%

Processed Products 15%

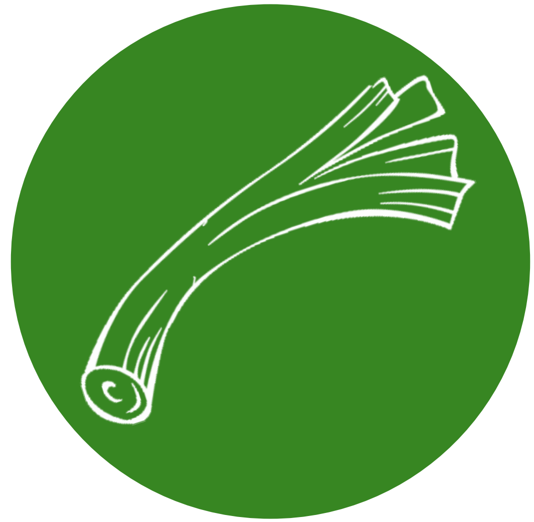
Sauces & Seasonings 14%

Top Claims



Leek Product Launches:
Last 3 Months (January – March 2016)
Summary

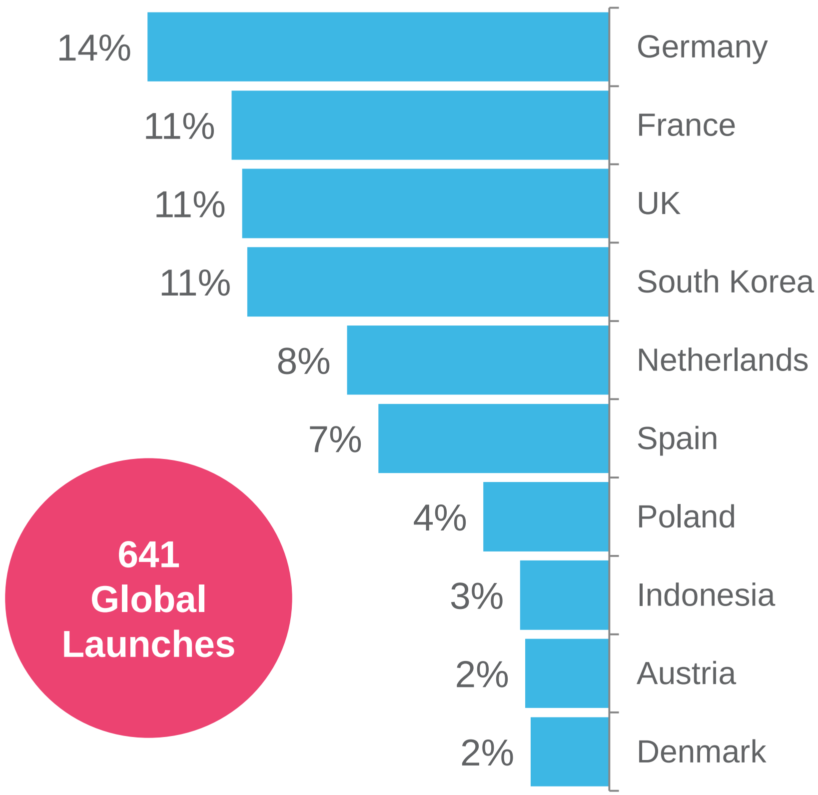
- There were 641 launches in the past 3 months globally that contained leeks as an ingredient, substantially higher than the previous wave (433).
- There were five products launched in Australia over the past three months.
- Europe (73%) was the key region for launches.
- Flexible packaging (31%), and trays (18%) were the most common format used for products.
- The main categories for launches were meals (28%), soups (18%), and processed products (15%).
- Claims used on products included microwaveable (26%) ease of use (24%), and no additives/preservatives (22%).
- The most innovative product launched was the Natural Vegetable Sausage from South Korea. Other examples can be found in the following pages.



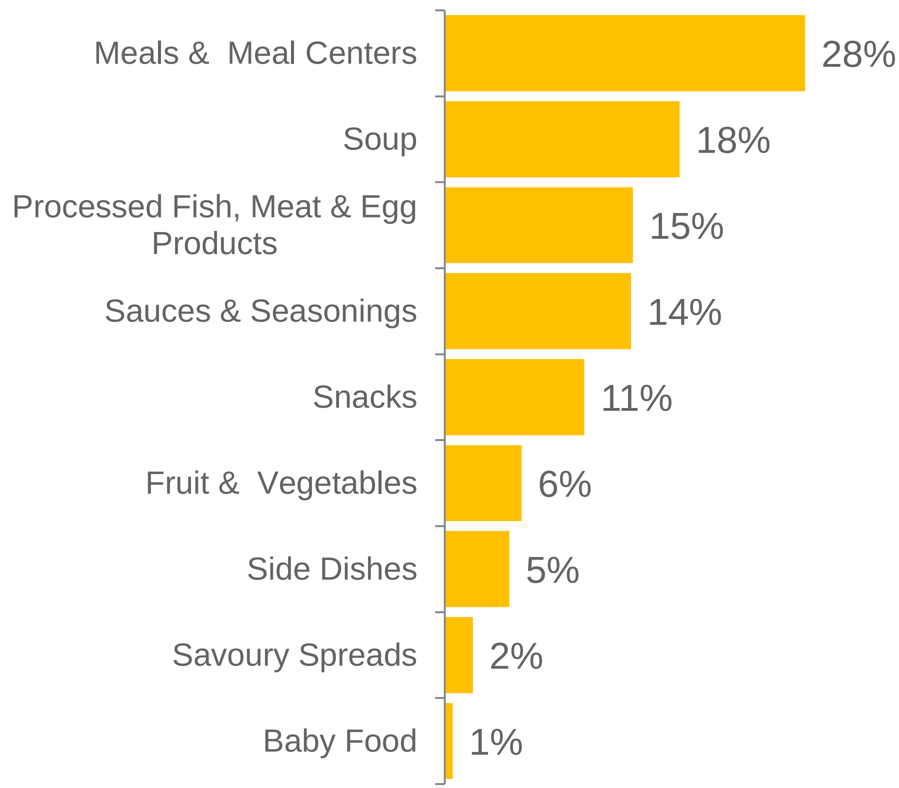
Source: Mintel (2016)

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

Top Launch Countries



Top Launch Categories



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

Pack Formats Used

Region	Pack format	%
Global	Flexible	31%
Global	Tray	18%
Global	Carton	10%
Europe	Flexible	24%
Europe	Tray	23%
Europe	Carton	13%
Asia Pacific	Flexible	57%
Asia Pacific	Flexible stand-up pouch	10%
Asia Pacific	Jar	8%

Top Claims Used

Region	Claim	%
Global	Microwaveable	31%
Global	Ease of Use	24%
Global	No Additives/Preservatives	22%
Europe	Microwaveable	32%
Europe	Ease of Use	24%
Europe	No Additives/Preservatives	21%
Asia Pacific	Microwaveable	29%
Asia Pacific	Ease of Use	25%
Asia Pacific	Time/Speed	24%

Only regions with n >30 are displayed

Innovative Leek Launches:
L3M (January – March 2016)

Auchan Ready Mix Carrot, Pumpkin, Leek and Haricot Mix (Spain)

Auchan Ready Mix Zanahoria, Calabaza, Puerro, Judia Verde Redonda (Carrot, Pumpkin, Leek and Haricot Mix) is now available. The microwavable product is said to be ideal for puree, and retails in a 200g pack.

Claims:
Microwaveable, Ease of Use

San Telmo Soy Fillets (Spain)

San Telmo Filetes de Soja (Soy Fillets) are now available. This product is ready to grill or fry, is a source of protein, is low in calories and free from cholesterol. It is said to be ideal with casseroles, stewed vegetables, green salad and sauces. The soy is claimed to be four times richer in protein than other legumes and meat

Claims:
Low/No/Reduced Cholesterol, Low/No/Reduced Calorie, High/Added Fiber, Other (Functional), Cardiovascular (Functional), Digestive (Functional), Ease of Use

Saeromi Busaneomuk Natural Vegetable Sausage (South Korea)

Saeromi Busaneomuk Natural Vegetable Sausage is made of domestic pork, domestic potato starch, domestic vegetables and roasted salt. It contains no wheat flour and is free from gluten, acidity regulator, artificial sweetener, synthetic preservatives, raising agent, colouring agent and flavour enhancer. This product retails in a 200g pack bearing the HACCP logo.

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

Jumbo Fried Rice with Pork Roast (Netherlands)

Jumbo Nasi Goreng met Babi Pangang (Fried Rice With Pork Roast) has been reformulated to feature an improved recipe. The ready-to-use product is made with pork, egg and leek, and can be prepared in the microwave. The milk-free product retails in a 500g pack, providing one portion.

Claims:
Microwaveable, Low/No/Reduced Allergen, Ease of Use

Source: Mintel (2016)

Innovative Leek Launches:
L3M (January – March 2016)

Crai Vegetable Soup with Cereals (Italy)

Crai Zuppa di Legumi e Cereali (Vegetable Soup with Cereals) has been relaunched and was previously under Crai Pronti Più brand name. The product consists of a deep frozen legumes and cereals soup, which is rich in fibre and cooks in 12 minutes in the pan. It is formulated with extra virgin olive oil and retails in a 600g pack which provides two servings.

Claims:
High/Added Fiber

Dolmio Smooth Bolognese Sauce with Hidden Vegetables (UK)

Dolmio Smooth Bolognese Sauce with Hidden Vegetables comprises a tomato sauce with 100% natural ingredients. This vegetarian sauce provides one of the five-a-day recommended portions of fruit and vegetables, and retails in a 500g pack featuring a recipe suggestion and is sufficient for four portions.

Claims:
All Natural Product, Vegetarian

Ella's Kitchen Toddler Cheddar + Leeks Multigrain Wheels (USA)

Ella's Kitchen Toddler Cheddar + Leeks Multigrain Wheels are now available.The USDA organic and kosher certified product is described as an unsweetened light multigrain snack that is free from artificial colors, artificial flavors, concentrates, GMOs and salt. It is said to be great for picnics, shopping trips, car journeys, lunch boxes or even for munching at home, and is suitable for toddlers from one year of age.

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

Tesco Finest Sweet Pink Lady Apple Leek & Herb Stuffing Mix (UK)

Tesco Finest Sweet Pink Lady Apple Leek & Herb Stuffing Mix comprises toasted ciabatta style breadcrumbs made with extra virgin olive oil, croutons, dried Pink Lady apples, dried leeks and dried herbs. This premium product is suitable for vegetarians and is said to be ideal as an accompaniment to pork and poultry. It retails in a recyclable 130g pack.

Claims:
Vegetarian, Premium, Ethical - Environmentally Friendly Package

Source: Mintel (2016)

Innovative Leek Launches:

L3M (January – March 2016)

Tartex Vegetarian Pâté with Herbs (Netherlands)

Tartex Plantaardig Smeerbaar Broodbeleg met Kruiden (Vegetarian Pâté with Herbs) is organic, vegan and gluten free. The product retails in a 45g pack featuring the EU Green Leaf logo.

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

Fürstenkrone Delikatessmomente Leek Salad with Ham (Germany)

Fürstenkrone Delikatessmomente Lauchsalat mit Vorderschinken (Leek Salad with Ham) is now available. This product retails in a 200g pack.

Claims:
N/A

Jamie Oliver by Compliments Ultimate Creamy Chicken and Veggies Bake (Canada)

Jamie Oliver by Compliments Ultimate Creamy Chicken and Veggies Bake is now available. This meal with lovely sweet peas has been made using chicken raised without antibiotics, contains no artificial flavours or preservatives, and made using planet-friendly humanely raised chicken. This classic meal comprises creamy chicken with chunky vegetables, tender potatoes, leeks, carrots, onions, and lovely sweet peas, all together in a classic creamy sauce flavoured with thyme and bay leaves.

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

Pan Alpine Hot Dog (Italy)

Pan Hot Dog Alpino (Alpine Hot Dog) is now available. This frozen product is made with sausage and sauerkraut, is ready to cook and retails in a 320g pack containing two units.

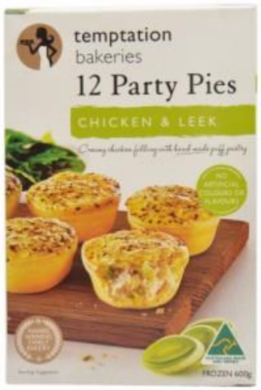
Claims:
Ease of Use

Source: Mintel (2016)

Australian Leek Launches:
L3M (January – March 2016)

Temptation Bakeries Chicken & Leek Party Pies

Temptation Bakeries Chicken & Leek Party Pies are described as creamy chicken filling with hand made puff pastry. This microwaveable product is said to be baked from scratch, using premium ingredients, locally source when possible. It contains no artificial colours or flavours and retails in a 600g recyclable pack featuring the Award Winning Family Bakery and the Australian Made and Owned logos.



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

Hanabi Tasty Bites Korean Vegetable Gyoza

Hanabi Tasty Bites Korean Vegetable Gyoza are easy to prepare and can be pan fried, steamed, boiled, microwaved or deep fried. The product retails in a 675g pack containing 50 pieces.

Claims:
Microwaveable, Ease of Use

Maggie Beer Sweet Potato, Pear & Ginger Soup

Maggie Beer Sweet Potato, Pear & Ginger Soup is described as a rich, earthy vegetarian sweet potato soup with added piquancy of ripe pear, the warmth of fresh ginger and indulgence of thick cream. The microwaveable product can be simply heated and added with swirl of rich and thick cream. It is suitable for vegetarians and retails in a 500g pack.

Claims:
Microwaveable, Vegetarian, Ease of Use

Source: Mintel (2016)

In the Media.

General Vegetable News
(January – March 2016)

- A study led by Monash University has found that a shopping trolley of healthy food is costing rural and regional Victorians more than those living in the city. This has raised concerns that a nutritious diet may be out of reach for some families.

- The research found that the price of fruit and vegetables across the state rose by 12 per cent on average, while non-core foods such as sugar, margarine and oil fell by 3 per cent.

- One of the key findings was the fluctuation in price of fruit and vegetables compared to other food groups. This may result in varying levels of consumption of these foods.

- While the exact reason for the price difference was difficult to pinpoint, Dr Palermo stated that things like transport costs and lack of competition within smaller towns could have driven prices higher.

http://www.abc.net.au

Commodity News

(January – March 2016)

- Broccoli has been linked to a growing list of health benefits, such as reduced risk of cancer and osteoporosis.
- New research has suggested that consuming broccoli could also slow or reverse blood-vessel damage and atherosclerosis due to high cholesterol.

http://www.wsj.com/

- Disaster Bay Chillies on the New South Wales South Coast has been producing a chilli wine.
- The wine is made from chillies that are fermented for six months. This is then put through a fine filter to remove any yeast so that once in the bottle it can't re-ferment.
- The flavour is said to be an unusual mix of sweet and medium-heat.

http://www.abc.net.au

- The Northern Territory's only commercial lettuce grower says the summer has hit production pretty hard.
- Due to the heat and some humidity, produce has only been available locally, with sales to Darwin forgone.
- Mr. McKosker said the lettuce market had changed in recent years and the whole-head market had "diminished dramatically in favour of cut leaf". "The cut leaf is probably 70 per cent of our market, whereas five years ago, the whole head was 7 per cent of our market."

http://www.abc.net.au

- Columbia Fresh Product in the United States announced a new sweet corn that is suitable for the food service industry and retail grocers of all types. The sweet corn is currently available in 6-inch long cobs, is pre-cooked and vacuumed packed, offering an amazingly long shelf life when kept refrigerated.
- The sweet corn variety is bi-coloured (mixed yellow and white kernels) that has a fresh crunchy taste.

http://www.restaurantnews.com

Commodity News
(January – March 2016)

There was no green pea specific news to report this wave.

- Demand for kale has been quickly growing in popularity in Europe.
- The winter months have the highest consumption volumes for the vegetable, which is highly sought after due to its nutritional properties. Greater knowledge of new culinary uses has also assisted in its rise, being used in salads, fruit smoothies and baked dishes.

http://www.freshplaza.com/

- Belgian growers will soon be allowed to export leek to Indonesia. Belgium only exported apples and pears to Indonesia until now, but in limited amounts.
- The target audience isn't for Indonesians, but for the 11 million Western tourists coming into the country every year.

http://www.freshplaza.com/

Project Harvest Background & Methodology

Background to the research.

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

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

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

This wave's report (Wave 34, March 2016) focuses on:

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

This current report will highlight any observations in regards to these specific commodities.

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

Horticulture Innovation Australia

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Online Methodology.

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

General consumer 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.

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

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

To qualify for the questionnaire, consumers...

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

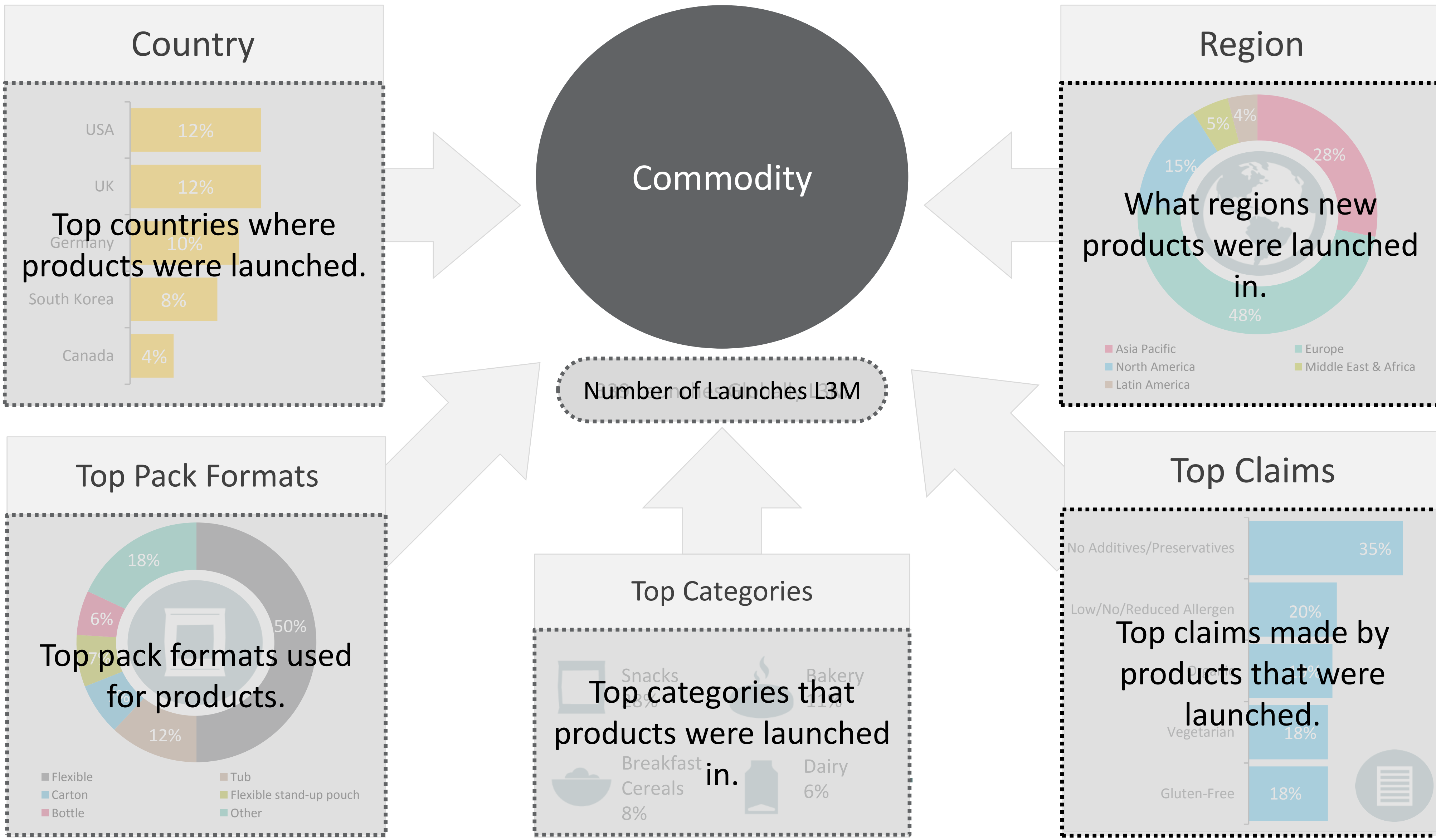
	Broccoli n=303	Chilli n=202	Lettuce n=304	Sweet Corn n=310	Green Peas n=307	Kale n=202	Leek n=202
Gender							
Male	39%	50%	41%	41%	40%	36%	39%
Female	61%	50%	59%	59%	60%	64%	61%
Age							
18-24 y.o.	3%	1%	2%	2%	4%	2%	0%
25-34 y.o.	6%	14%	6%	10%	10%	17%	8%
35-44 y.o.	13%	11%	8%	14%	13%	13%	10%
45-54 y.o.	16%	19%	19%	23%	18%	20%	15%
55-64 y.o.	30%	28%	28%	26%	25%	24%	32%
65+ y.o.	32%	27%	37%	25%	30%	23%	34%
Household							
Single Income no Kids	24%	23%	23%	21%	20%	12%	16%
Double Income no Kids	17%	17%	14%	14%	17%	18%	18%
Young Families	7%	13%	6%	11%	7%	13%	11%
Established Families	19%	20%	19%	25%	21%	25%	15%
Empty Nesters	33%	28%	38%	30%	35%	31%	40%
Location							
New South Wales	11%	23%	12%	16%	19%	23%	22%
Victoria	17%	22%	16%	15%	16%	16%	19%
South Australia	22%	7%	23%	21%	15%	13%	13%
Queensland	17%	23%	17%	14%	18%	15%	20%
Western Australia	19%	13%	18%	19%	19%	24%	16%
Tasmania	8%	5%	8%	9%	6%	3%	6%
Australian Capital Territory	5%	6%	4%	5%	5%	3%	2%
Northern Territory	2%	0%	2%	1%	2%	1%	2%

Trends Research: Our Approach

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

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

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



Thanks.