



# Project Harvest Monthly Tracker Report.

## **Wave 35, April 2016**

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

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

**Horticulture  
Innovation**  
Australia



**colmar brunton.**





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# Wave 35: Executive Summary



# Industry Insight

## **Truly delivering to consumer desires would be a game changer for Australian growers.**

Recently, the Harvest Consumer Tracker detected an increase in Coles as the stated purchase channel for fresh produce, overtaking Woolworths for the first time since the Tracker's inception in 2012. The current wave of tracking has additionally observed a trending increase in purchase of fresh vegetables from Aldi (up to 8% increase for individual vegetable categories over the past 9 months). Similarly, Colmar Brunton's Shopper Pulse (to be published in Retail World, June 2016), shows a 5% increase in Aldi as the main grocery store for total shop for the same period. Consumers tell us that Aldi is receiving about 13% of their total grocery spend, with 43% of consumers spending at least 10% of their total grocery spend there. Whilst less than half of what is spent at Coles and Woolworths (35% and 31%, respectively), this supports the growing divergence in the shopping habits of Australians.

# Industry Insight cont.

Hungry for more facts and figures? On average, shoppers say they buy groceries from three different supermarket chains regularly, with only one quarter now loyal to one store brand. This desire for variety extends to the product range in store, and although Coles and Woolworths are perceived to have the best range of items, 36% of consumers still say that they want a greater range of fresh fruit and vegetables! This is a remarkable and striking message that consumers are sending, and is by far the highest percentage for desired ranging within a single category. For example 31% for meat/poultry items, 24% for bakery items and less than 15% for cereals, milk and eggs. Conversely, many consumers state they would like to see a smaller range within some categories (21% for carbonated soft drinks, 19% confectionery and 17% snack foods).

This desire for a greater range of fresh produce in store is reflected in the 10% growth in interest for new varieties of vegetables over the past three years as measured by the Harvest Consumer Tracker. Combined, the evidence begs the question...which retailer is ready to deliver on consumer desires in order to reap the potential rewards?



# Cabbage Grower Action Plan.

## Wave 35 Fast Facts

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

31%

of consumers purchase cabbage because the whole family likes them.

1.

### Insight:

Adding variety to their vegetable selection is a key trigger for cabbage purchase.

### Short Term Recommendation:

Promote the versatility of cabbage by differentiating the varieties and their specific uses. For example, red drumhead cabbage adds colour to a meal and is suitable for pickling, shredding into salads and coleslaws, whereas, savoy cabbage is slightly more tender in texture and suitable for grating into salads as well as using in stir-fries.

2.

### Insight:

Cabbage is primarily cooked in Australian and Chinese cuisine.

### Long Term Recommendation:

Promote alternative cuisines and cooking styles for cabbage by providing recipes in-store and on pack. For example, Polish cabbage rolls. Include the most suitable variety for each recipe.







# Celery Grower Action Plan.

## Wave 35 Fast Facts

- ▶ Celery continues to perform below average on the majority of category health and consumer sentiment measures, except for satisfaction.
- ▶ Celery is purchased three times per month and consumed on average nine occasions per month, which has slightly declined since the previous wave.
- ▶ Consumers purchase whole bunches of celery. Recalled last spend is \$2.80, in line with past months. Overall, celery is perceived to be good value for money.
- ▶ Price tracking indicates the average price per bunch of celery in April 2016 is \$2.60, slightly higher than prices recorded in December 2015 (\$2.47).
- ▶ Spontaneous awareness of celery types remains very low, with 83% of consumers unable to state a type.
- ▶ Top triggers to purchase are to use as an ingredient in dishes, health and great taste. Limiting waste is the main barrier to purchase.
- ▶ Consumers expect celery to remain fresh for ten days, with longevity perceptions remaining consistent over recent waves.

35%

of consumers purchase celery because they like the texture.

1.

### Insight:

Ease of preparation is increasing as a trigger to purchase.

### Short Term Recommendation:

Highlight ease of preparation on pack, including minimal requirements for cooking. Provide consumers with easy (15-30 minute) recipe ideas that incorporate celery. This will appeal to time conscious consumers as well as highlight the versatility celery.

2.

### Insight:

Celery is commonly cooked in soups, especially in winter months.

### Long Term Recommendation:

Investigate NPD opportunities that incorporate celery, carrots and onions in ready made fresh vegetable soup packs that consumers can cook at home. These products may appeal to Millennial consumers due to minimal wastage, which should be highlighted on pack.





# Cucumber Grower Action Plan.

## Wave 35 Fast Facts

- ▶ Consumers are generally satisfied with cucumbers, which is above the Vegetable Average.
- ▶ Cucumber is purchased on average 4 times per month and consumed around 12 times per month. Purchase is primarily made through mainstream retailers.
- ▶ Weight of purchase has increased this wave, with consumers purchasing on average 700g of Cucumber.
- ▶ Price tracking of Lebanese cucumbers reveals a national average of \$4.27 per kg in April, which is lower than the previous wave (\$4.56 per kg in December).
- ▶ One third of consumers are unable to recall a type of cucumber. Lebanese and Continental/Telegraph types hold the greatest recall.
- ▶ Cucumber is expected to stay fresh for 8 days, with expectations generally met.
- ▶ Key drivers of purchase are predominately influenced by taste and health. Barriers to purchase are not wanting to waste any and already consuming enough.

6.6/10

consumers perceive cucumbers to be good value for money.

1.

### Insight:

Consumers purchase cucumber to complement other food. However, one third of consumers are unable to recall any varieties.

### Short Term Recommendation:

Further differentiate cucumber varieties by highlighting the flavour and texture profiles that each variety will bring to a dish – as well as what varieties are best suited to different styles i.e. Lebanese cucumbers are great in fresh salads as they contain less seeds and have a crunchier texture.

2.

### Insight:

Nearly half of consumers eat cucumber as a quick meal or snack.

### Long Term Recommendation:

Develop new products that contain cucumber which fit in the quick meal or snack criteria. This may include cucumber sorbet, tzatziki chips and DIY pickle packs.



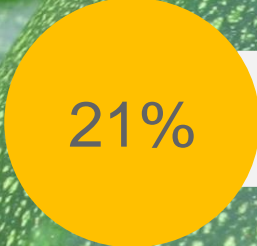




# Zucchini Grower Action Plan.

## Wave 35 Fast Facts

- ▶ Consumers are generally satisfied with zucchini, and hold high levels of endorsement.
- ▶ Consumers purchase zucchini on average 3 times per month and consume 7 times per month. Key retailers for zucchini purchase remain mainstream and specialist stores.
- ▶ Weight of purchase (700g) and recalled last spend (\$2.90) remained stable, while value for money (6.6/10) noticeably increased this wave.
- ▶ Zucchini's national average price is slightly higher, sitting at \$3.65 per kg in April 2016 compared to \$3.30 per kg in December 2015.
- ▶ Awareness of zucchini types remains very low, with nearly three quarters of consumers unable to name a variety. Those who can are largely prompted by colour.
- ▶ Zucchini is expected to remain fresh for just over a week, with expectations of freshness likely to be met most of the time.
- ▶ Top triggers to purchase are ease of preparation and to use as an ingredient in dishes. Consumers limit purchase of zucchini because they already consume enough and want to limit waste.



of consumers grilled zucchini as a cooking style.

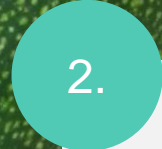


### Insight:

Consumers purchase zucchini because it cooks quickly, and can be cooked in a number of different styles.

### Short Term Recommendation:

Engage consumers by providing a range of cooking ideas at point of sale. Focus on quick preparation and cooking style recipes, such as frying, grilling or pre-prepared zucchini noodles.



### Insight:

Consumers are moving towards small pre-packaged formats when purchasing zucchini. However, concern for wastage is limiting purchase of zucchini.

### Long Term Recommendation:

There may be a need for a greater variety of pack sizes that meet the needs of single household to 6+ people households, especially with waste top of mind for consumers. Clearly call out serving sizes on all packages.





## Wave 35 Fast Facts

- ▶ Eggplant has low importance relative to the Vegetable Average, but holds strong levels of interest, satisfaction, endorsement and future purchase intent.
- ▶ Purchase occasions occur approximately three times per month, remaining relatively consistent with the previous wave, whilst eggplants are consumed five times per month. Mainstream and specialist retailers are the main outlets for purchase.
- ▶ Consumers purchase 900g of eggplant per shop. Recalled last spent has remained stable at \$4.00, with value for money perceived as fair (6.3/10).
- ▶ Pricing analysis revealed the national average price for purple eggplant is \$7.24 in April 2016, which is lower than \$8.09 in December 2015.
- ▶ Unprompted awareness of eggplant types remains low, with over two thirds of consumers unable to recall a type.
- ▶ Key influences to purchase are taste and variety. Key barriers to purchase are price and wanting a variety of vegetables in their diet.
- ▶ Eggplant is expected to remain fresh for just over a week. This expectation is being met most of the time.

35%

of consumers cook eggplant in Italian cuisine.

1.

### Insight:

There is a high level of purchase of eggplant from specialist retailers and markets.

### Short Term Recommendation:

Investigate alternative channels for distribution of eggplant outside of mainstream supermarkets. Distribution to these channels are favourable with consumers as they are able to offer a variety of different eggplant types that are unavailable in mainstream supermarkets.

2.

### Insight:

Consumers have very low level of varietal awareness, which has been declining across waves.

### Long Term Recommendation:

Increase value for money perceptions by educating consumers on the different varieties of eggplant. This includes name, flavour, texture and colour that each variety will add to meals, as well as suitability for cooking styles and cuisines.





## Wave 35 Fast Facts

- ▶ Spring onions hold strong importance for consumers. The majority of consumers indicate they intend to purchase the same amount as they currently do.
- ▶ Purchase frequency of spring onion occurs 3 times per month and it is consumed on 8 occasions per month on average, both lower than the previous wave.
- ▶ On average, consumers purchase 300g of spring onion and recalled spending \$2.40 on their last shop.
- ▶ Analysis of national pricing revealed an average price of \$2.10 each. Spring onion is perceived to be fair value for money (6.2/10).
- ▶ Awareness of spring onion varieties is very low, with 86% unable to recall a type.
- ▶ The primary triggers to purchase are to use as an ingredient and great taste. Limiting waste remains the main barrier to purchase.
- ▶ Consumers expect spring onion to remain fresh for over a week, and this longevity is likely to be met most of the time.



of consumers used spring onions when cooking a new recipe.



### Insight:

Consumers purchase spring onions because they taste great and are easy to cook.

### Short Term Recommendation:

Consumers are comfortable experimenting with spring onion in new recipes. Provide consumers with new, easy-to-make recipe ideas at point of sale that help explore the versatility of spring onions. For example, spring onion pancakes, and spring onion, potato and cheese fritters.



### Insight:

Waste has declined as a barrier to purchase. However, perceptions of short shelf life still remains a key factor in future purchase.

### Long Term Recommendation:

Investigate New Product Development (NPD) opportunities that increase the shelf life of spring onions through potential innovations such as lightly dried spring onion (look to Gourmet Garden's 'Lightly Dried' product range for inspiration).







## Wave 35 Fast Facts

- ▶ Radish has high levels of importance, endorsement, interest and future purchase intent.
- ▶ Radishes are purchased on average four times per month and consumed ten times per month. Purchase is primarily from mainstream retailers and specialist retailers.
- ▶ On average consumers are purchasing 600g of radish. Recalled last spend was \$3.30, with value for money perceived to be fair (6.3/10). This is relatively consistent with the previous wave.
- ▶ Price tracking revealed an average price of \$3.18 per bunch in April 2016, higher than prices tracked in December 2015 (\$3.44 per bunch).
- ▶ Awareness of radish types is very low, with two-thirds of consumers unable to recall a type.
- ▶ The main motivations for purchasing radish are the taste and adding variety. Already consuming enough and limiting waste are the key barriers to purchase.
- ▶ Radish is expected to stay fresh for approximately 9 days, however there is a decline in these expectations being met.

9.8

is the average number of times consumers eat radish per month.

1.

### Insight:

Radish is increasingly being used in new recipes, as well as being consumed as snacks at home.

### Short Term Recommendation:

Provide consumers with new pre-prepared options that focus on radish being cooked in various styles rather than only being eaten raw. For example, ready-to-roast radish packs with butter that can be cooked in ten minutes. This will appeal to both Eager Explorers and Flavour Followers.

2.

### Insight:

Pickled vegetables are highly popular in Asian countries and are becoming the latest health food trend.

### Long Term Recommendation:

Investigate New Product Development (NPD) opportunities to accustomise Australian consumers to pickled radish. Highlight health benefits of pickled vegetables such as probiotic health and enhancing the vitamin content of the vegetable to appeal to health conscious consumers.





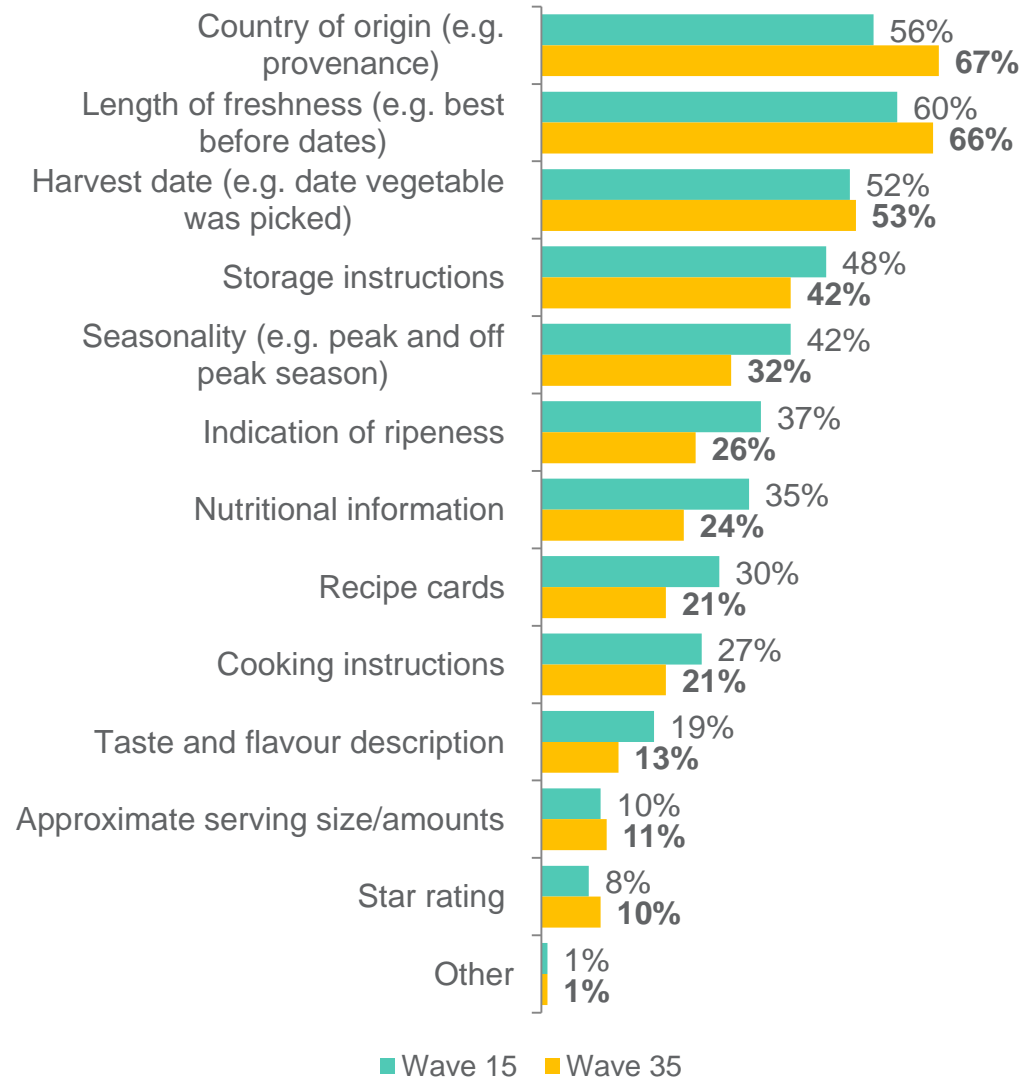
**Wave 35:**  
Response to Ad hoc  
Questions





# In-store Information

- Two thirds of consumers indicate they want information on country of origin and length of freshness. Country of origin information is highly important provenance information for consumers. Longevity of freshness remains crucial information at point of purchase and helps to manage value for money expectations.
- There were noticeable decreases in seasonality, indication of ripeness, nutritional information and recipe cards as helpful information since Wave 15.



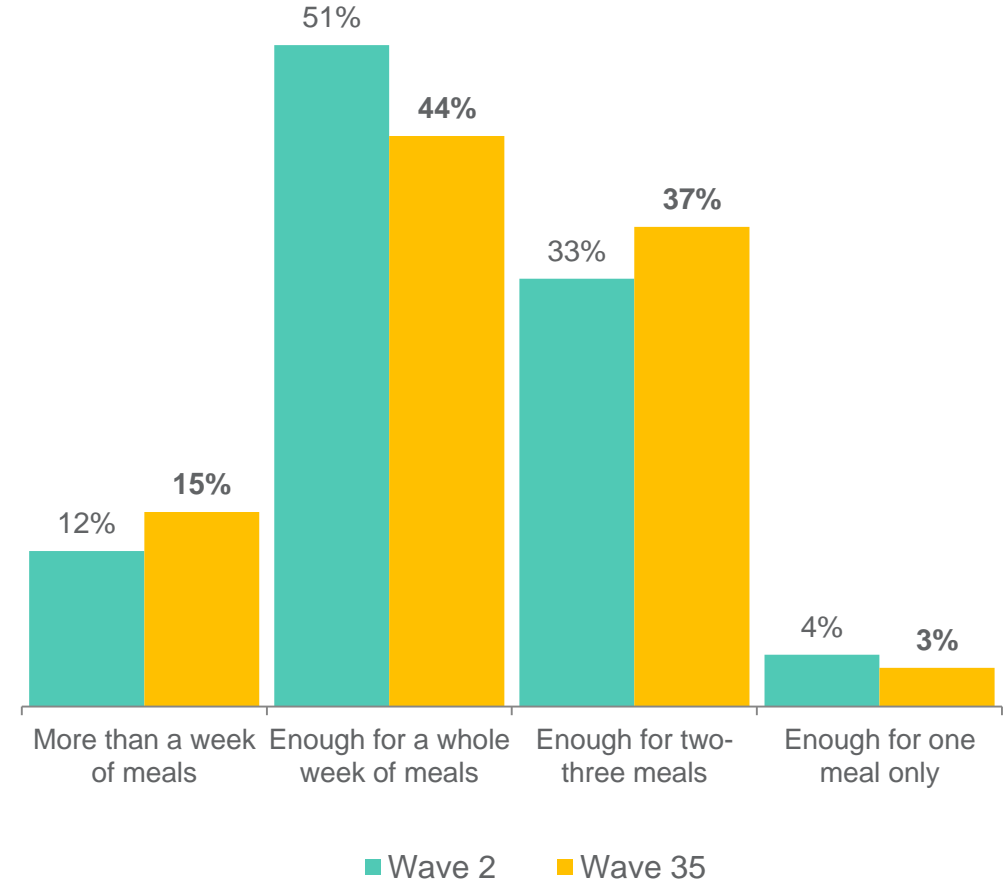




# Shopping Behaviour & Cooking Repertoire

- Respondents stated that they typically purchase vegetables for more than one meal, with the majority of respondents stocking vegetables to cook at least a weeks worth of meals, similar to findings from Wave 2.
- This wave sees an increase in vegetable purchases for two-three meals, and a decrease in stocking vegetables for a whole week of meals.

## Vegetable Shopping Behaviour





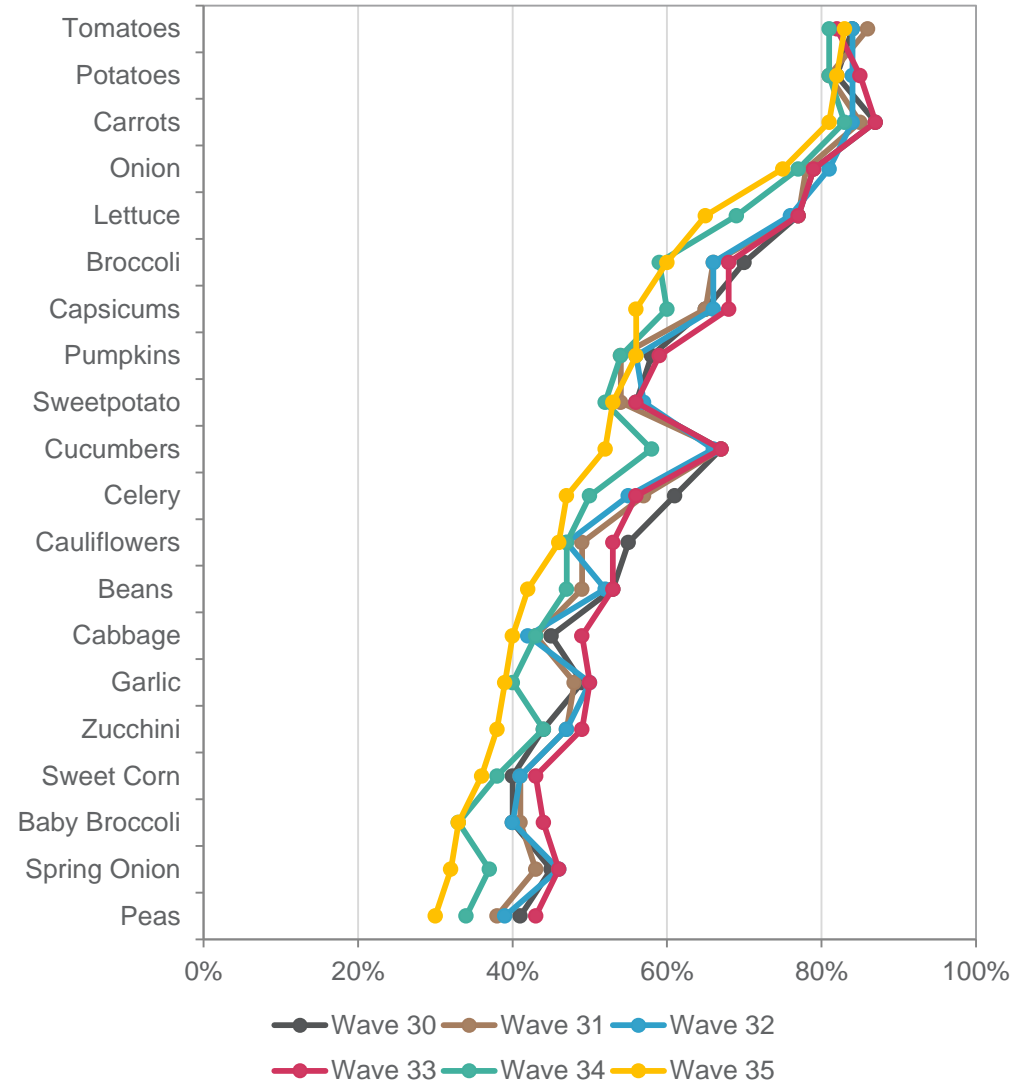
# Wave 35: Overall Vegetable Tracking





# Vegetables Purchased Last Month

- Tomatoes, potatoes, carrots and onions were the most purchased vegetables in April.
- There has been a decline in purchase of cucumbers, celery, beans, zucchini, spring onions and peas over the last three waves. This is likely due to the seasonal change.



Sample Wave 35, N=1263

S8. Which of the following fresh vegetables have you purchased in the last month?





# Category Health Explained

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

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

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





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

Both eggplant and radish have strong future purchase intent, which is consistent with past waves.

	Cabbage	Celery	Cucumber	Zucchini	Eggplant	Spring Onion	Radish	Vegetable Average
Importance	6.9	6.3	6.5	6.5	6.0	6.5	6.5	6.4
Satisfaction	7.2	7.2	7.2	7.0	6.7	6.7	6.2	6.6
Endorsement	6.9	6.7	6.9	7.0	7.3	6.6	7.2	7.0
Interest (New Varieties)	6.3	5.8	6.1	6.3	6.8	6.1	7.0	6.3
Future Purchase								
More	10%	8%	11%	9%	23%	9%	22%	15%
Same	89%	92%	88%	89%	77%	89%	78%	83%
Less	0%	0%	1%	1%	0%	1%	0%	1%

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



Cabbage.





The past wave has seen a decline in purchase and consumption frequency of cabbage.

Cabbage is most likely to be purchased from mainstream and specialist retailers. Purchase from markets has declined over the last three waves.

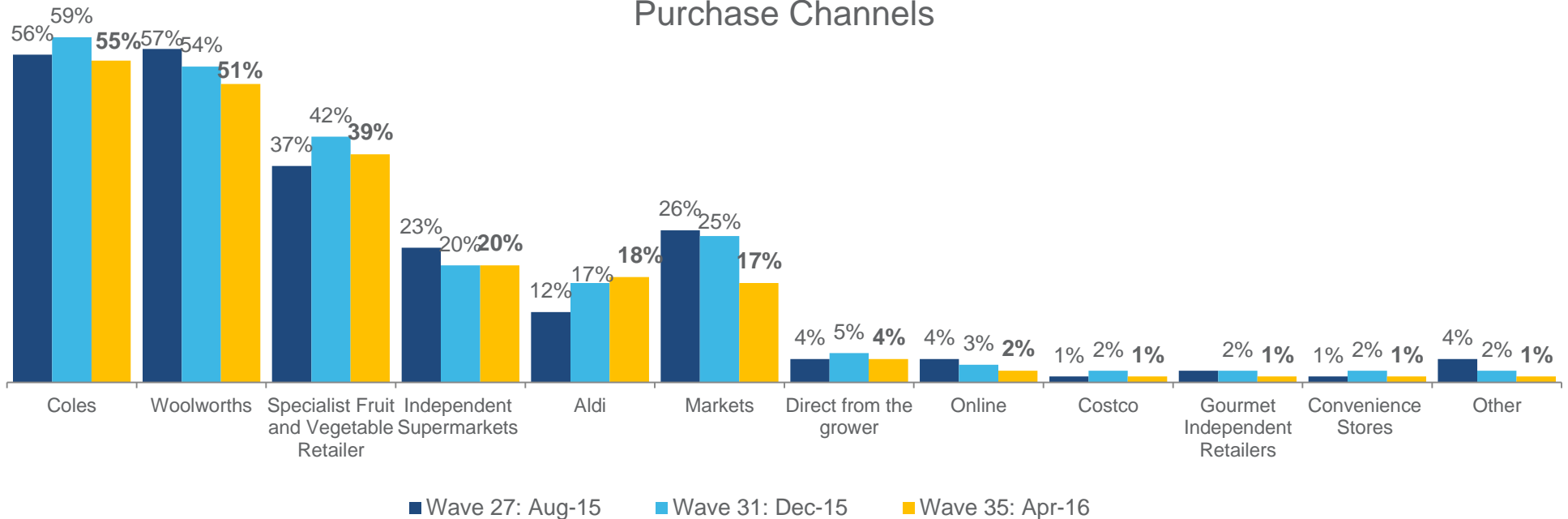


- ▲ 3.5 times, Wave 27
- ▲ 3.5 times, Wave 31

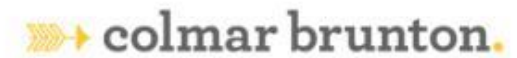


- ▲ 7.6 times, Wave 27
- ▲ 7.7 times, Wave 31

### 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 27 N=301, Wave 31 N=306, Wave 35 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 **1.0kg** of Cabbage, which is consistent with the previous wave.

- ▲ 1.1kg, Wave 27
- 1.0kg, Wave 31



Recalled last spend

The average recalled last spend was **\$3.00** in April 2016, in line with past waves.

- ▲ \$3.20 Wave 27
- \$3.00, Wave 31



Value for money

On average, consumers perceived Cabbage to be good value for money **(6.8/10)**, which is relatively consistent with previous waves.

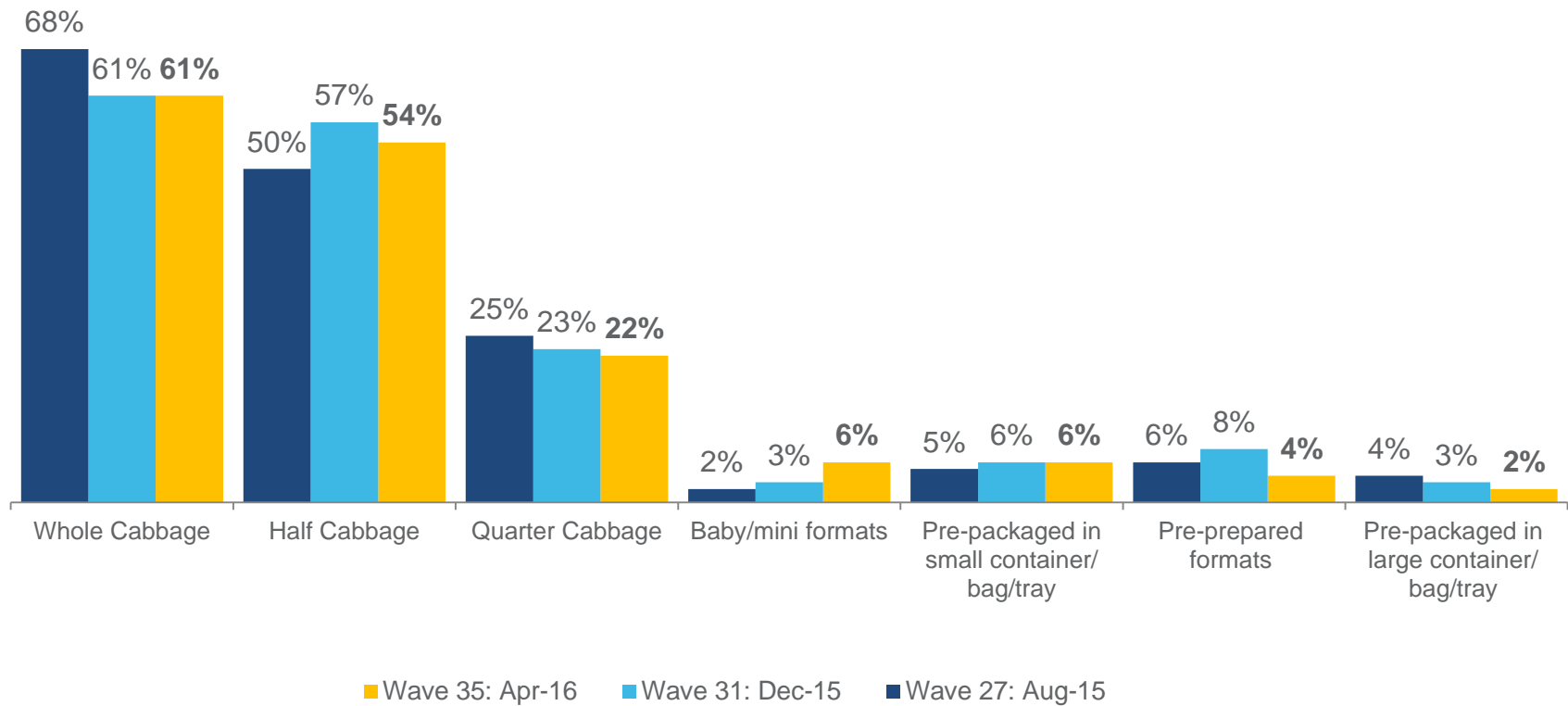
- 6.8/10, Wave 27
- ▼ 6.7/10, Wave 31

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 27 N=301, Wave 31 N=306, Wave 35 N=307





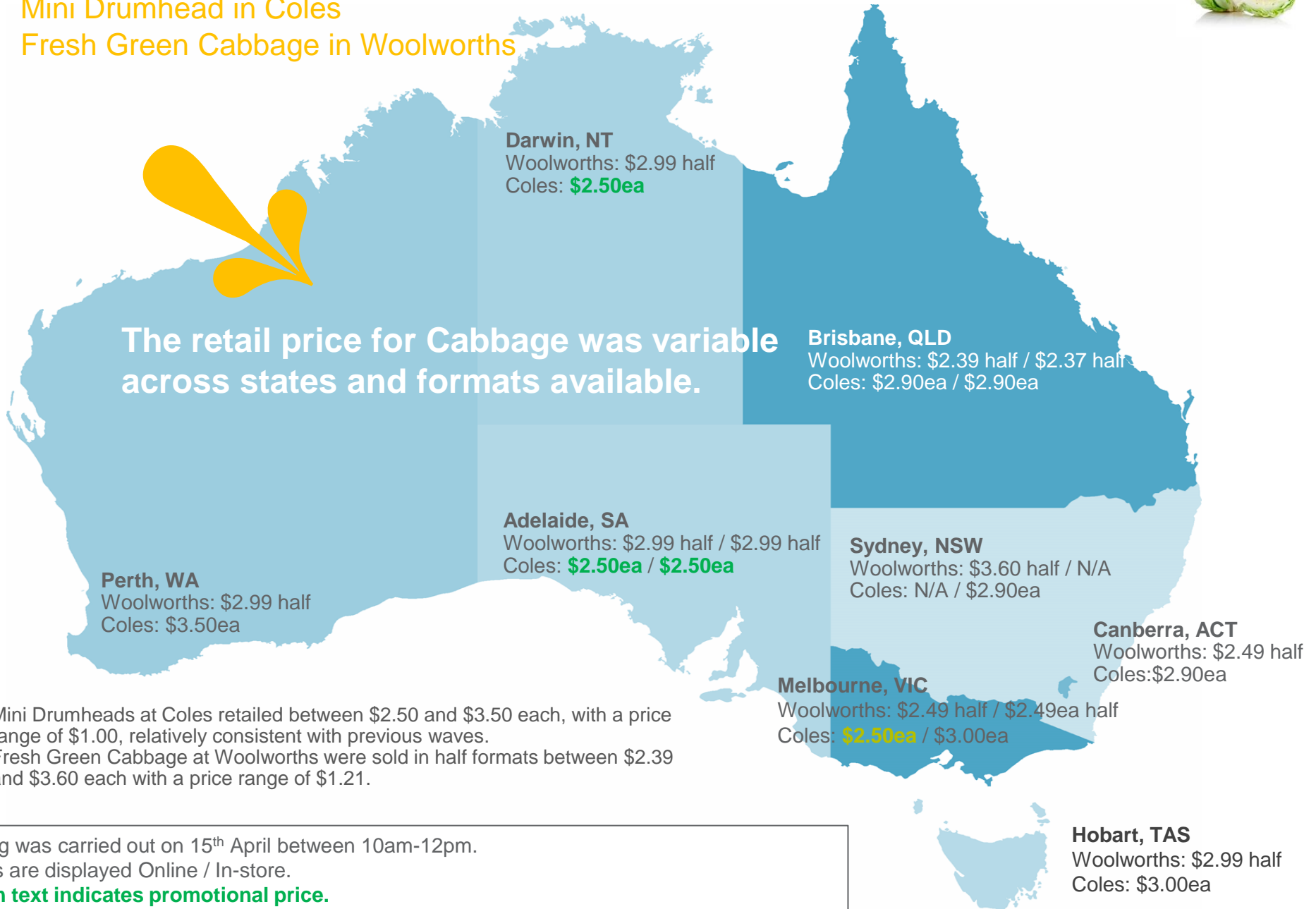
Whole and half cabbages remain the predominant formats purchased, consistent with previous waves.



# Online and In-store Commodity Prices

Mini Drumhead in Coles

Fresh Green Cabbage in Woolworths



- Mini Drumheads at Coles retailed between \$2.50 and \$3.50 each, with a price range of \$1.00, relatively consistent with previous waves.
- Fresh Green Cabbage at Woolworths were sold in half formats between \$2.39 and \$3.60 each with a price range of \$1.21.

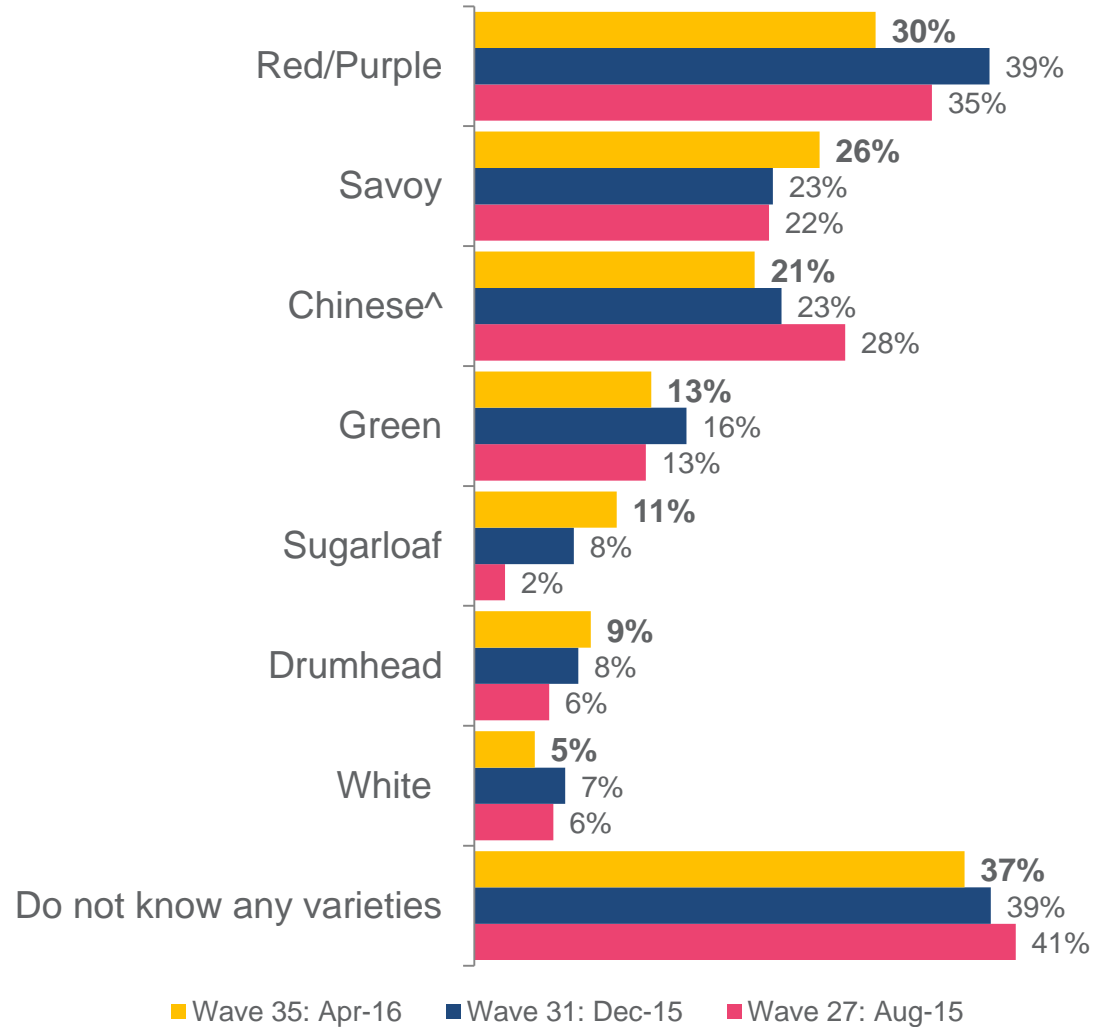
Pricing was carried out on 15<sup>th</sup> April between 10am-12pm.  
Prices are displayed Online / In-store.  
**Green text indicates promotional price.**



# Spontaneous Awareness

37% of consumers were unable to recall a type of cabbage.

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



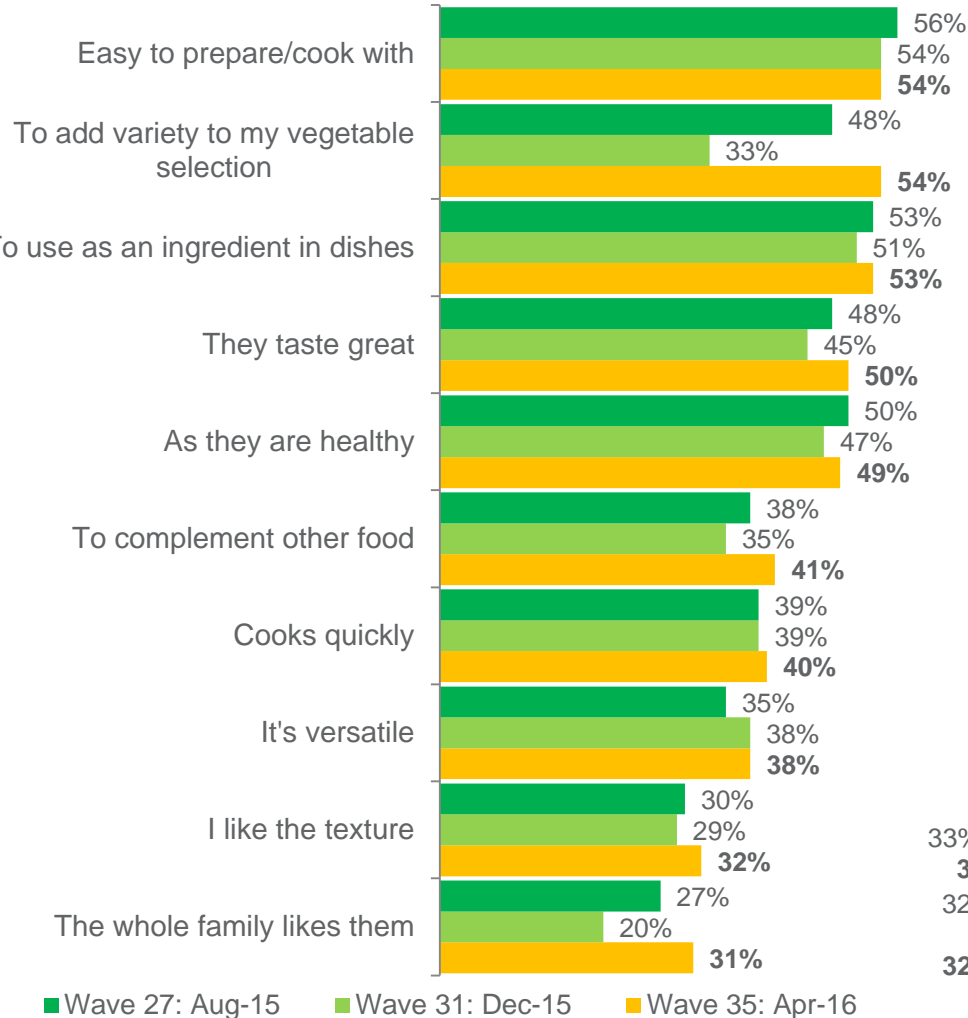
Q6a. What varieties of <commodity> are you aware of? (unprompted)  
 ^Chinese cabbage (Wombok) is recalled as a type of cabbage but is a different species than 'standard' cabbage  
 Sample Wave 27 N=301, Wave 31 N=306, Wave 35 N=307



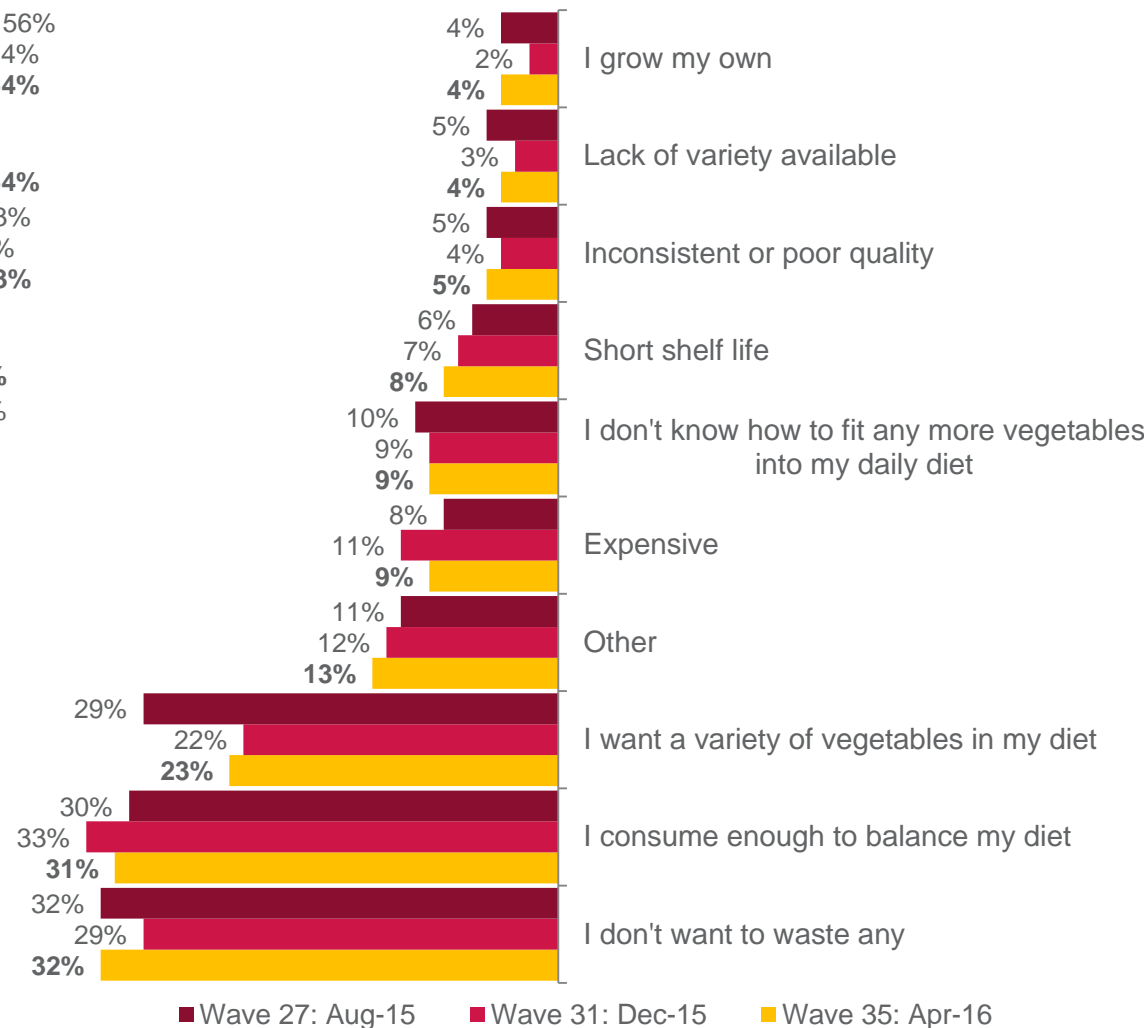
Ease of preparation and adding variety are the main drivers to consumers purchasing cabbage, while not wanting to waste any and already consuming enough are the main barriers inhibiting purchase. This wave has seen an increase in adding variety as a trigger to purchase.



### 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 27 N=301, Wave 31 N=306, Wave 35 N=307





Chinese cuisines are popular when cooking cabbage dishes.

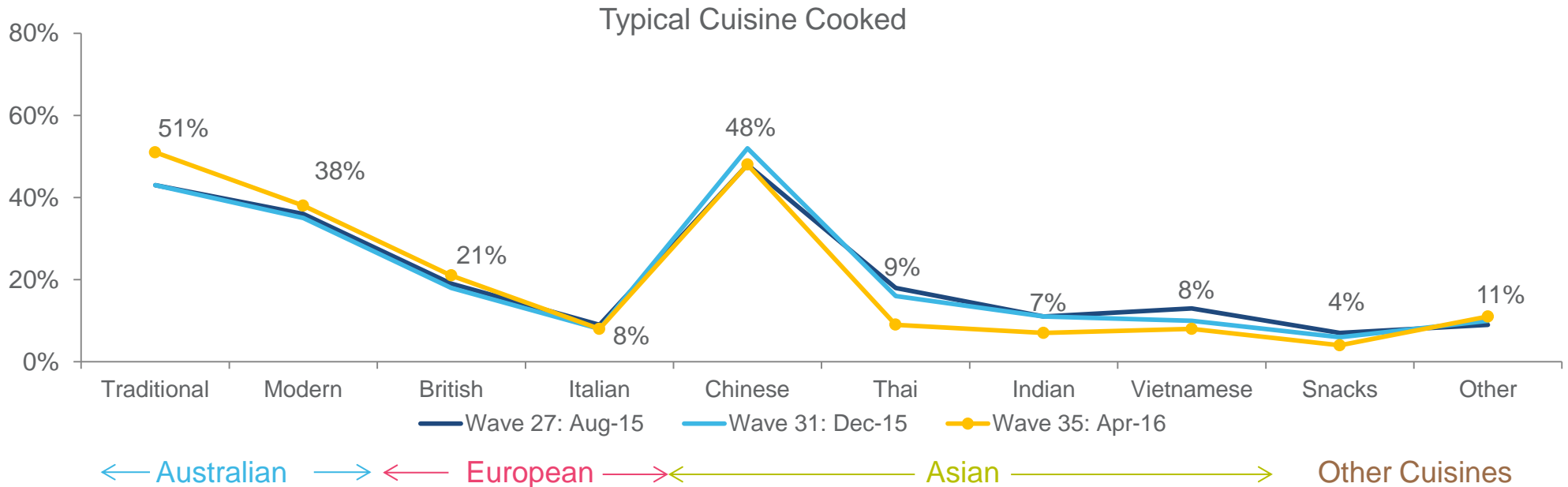
Consumption occasions and cuisine styles have remained relatively consistent over past waves.

### Top 5 Consumption Occasions

	Wave 31	Wave 35
Dinner	73%	77%
Family Meals	58%	61%
Weekday Meals	45%	49%
Weekend Meals	37%	43%
Quick Meals	42%	25%

**11%**  
used cabbage when cooking a new recipe

▲ 15%, Wave 31



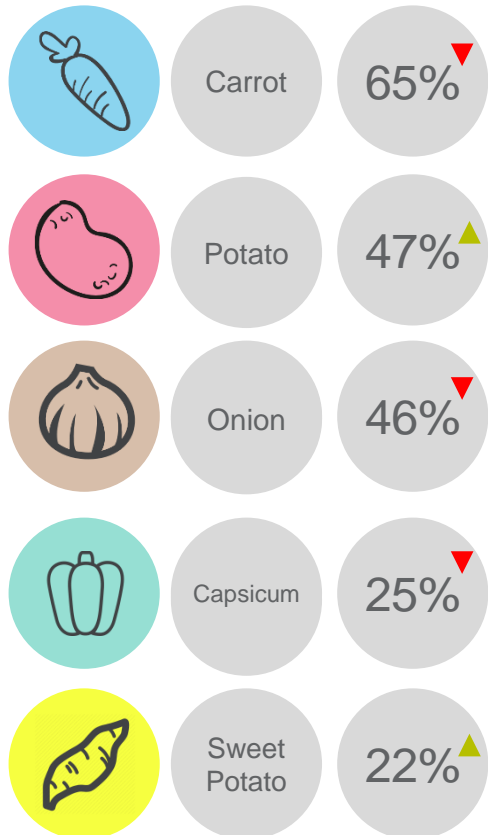
Q10. What cuisines do you cook/consume that use <commodity>?  
 Q11. Which of the following occasions do you typically consume/use <commodity>?  
 Sample Wave 27 N=301, Wave 31 N=306, Wave 35 N=307



Carrots, potatoes and onions are the main vegetables served with cabbage.

Consumers typically stir fry, steam or eat cabbage raw. There is a noticeable increase in boiling cabbage as a cooking style this wave.

### Accompanying Vegetables



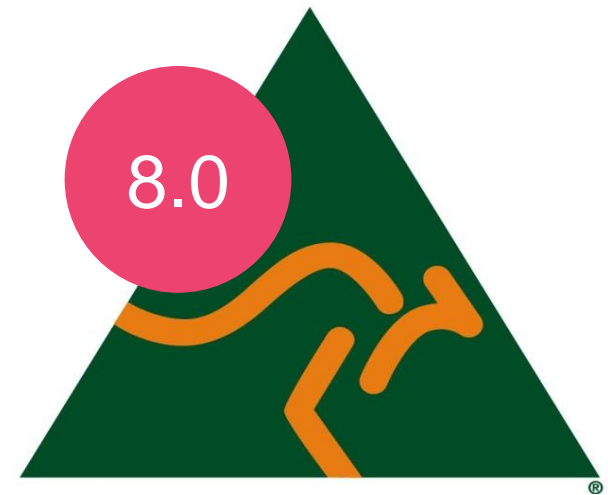
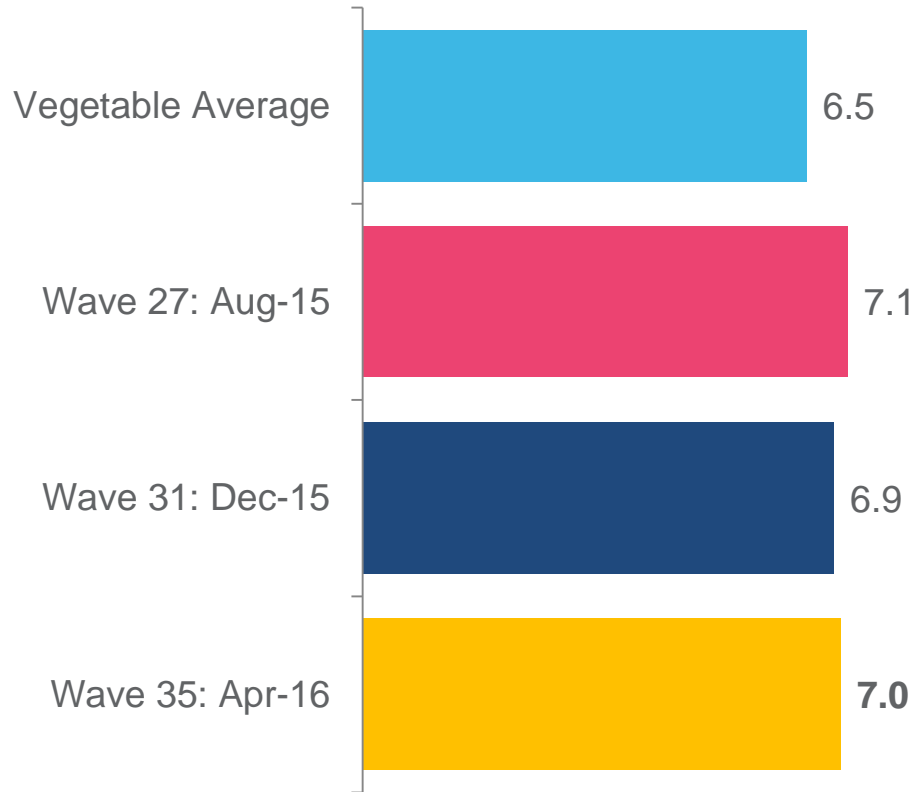
### Top Cooking Styles

	Wave 27	Wave 31	Wave 35
Stir frying	62%	58%	53%
Steaming	39%	43%	44%
Raw	41%	48%	42%
Boiling	28%	31%	41%
Soup	30%	23%	23%
Sautéing	25%	24%	22%
Frying	20%	17%	18%
Slow Cooking	18%	17%	14%
Microwave	10%	9%	10%
Other	3%	3%	4%

Q9. How do you typically cook <commodity>?  
 Q10a. And when are you serving <commodity> which of the following do you also serve together with this?  
 Sample Wave 27 N=301, Wave 31 N=306, Wave 35 N=307



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



Q14. When purchasing <commodity>, how important is Provenance to you?  
Q15. And when purchasing Cabbage, how important is that it is grown in Australia?  
Sample Wave 27 N=301, Wave 31 N=306, Wave 35 N=307



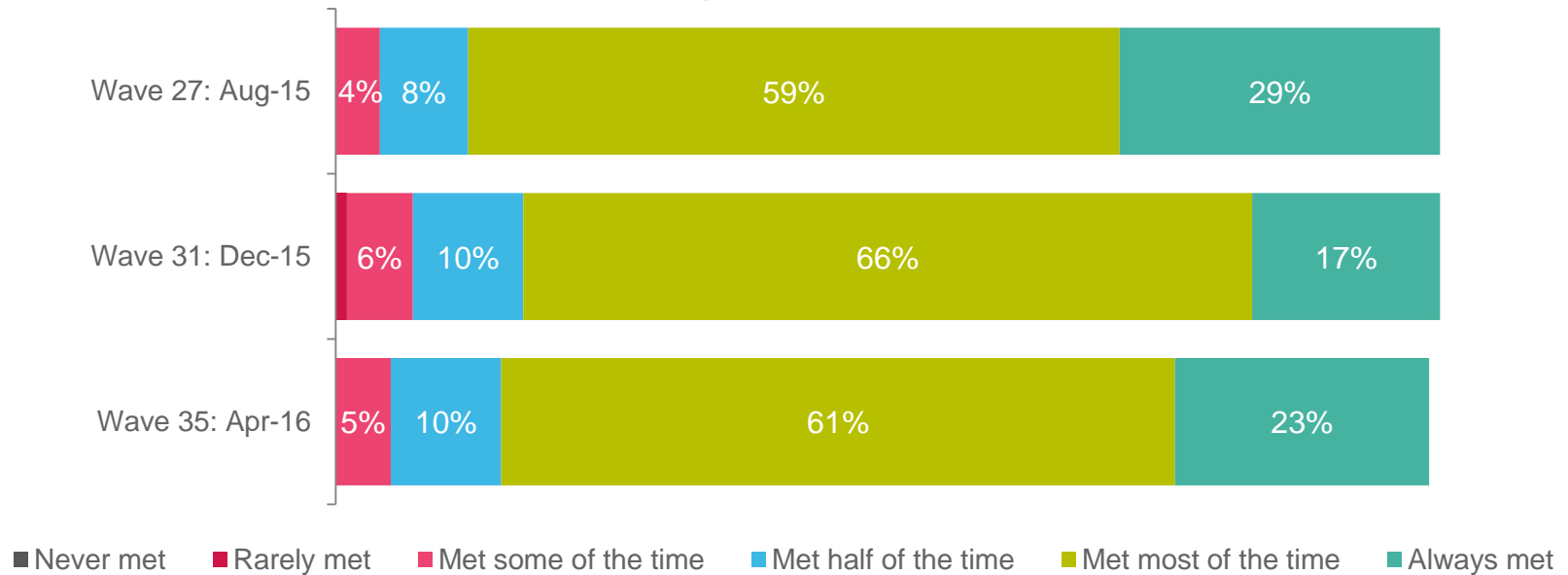
Cabbage is expected to remain fresh for 10 days once purchased. These expectations are typically met most of the time.

Expected to stay fresh for 10.1 days

▲ 10.7 days, Wave 27

▼ 9.8 days, Wave 31

### 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 27 N=301, Wave 31 N=306, Wave 35 N=307



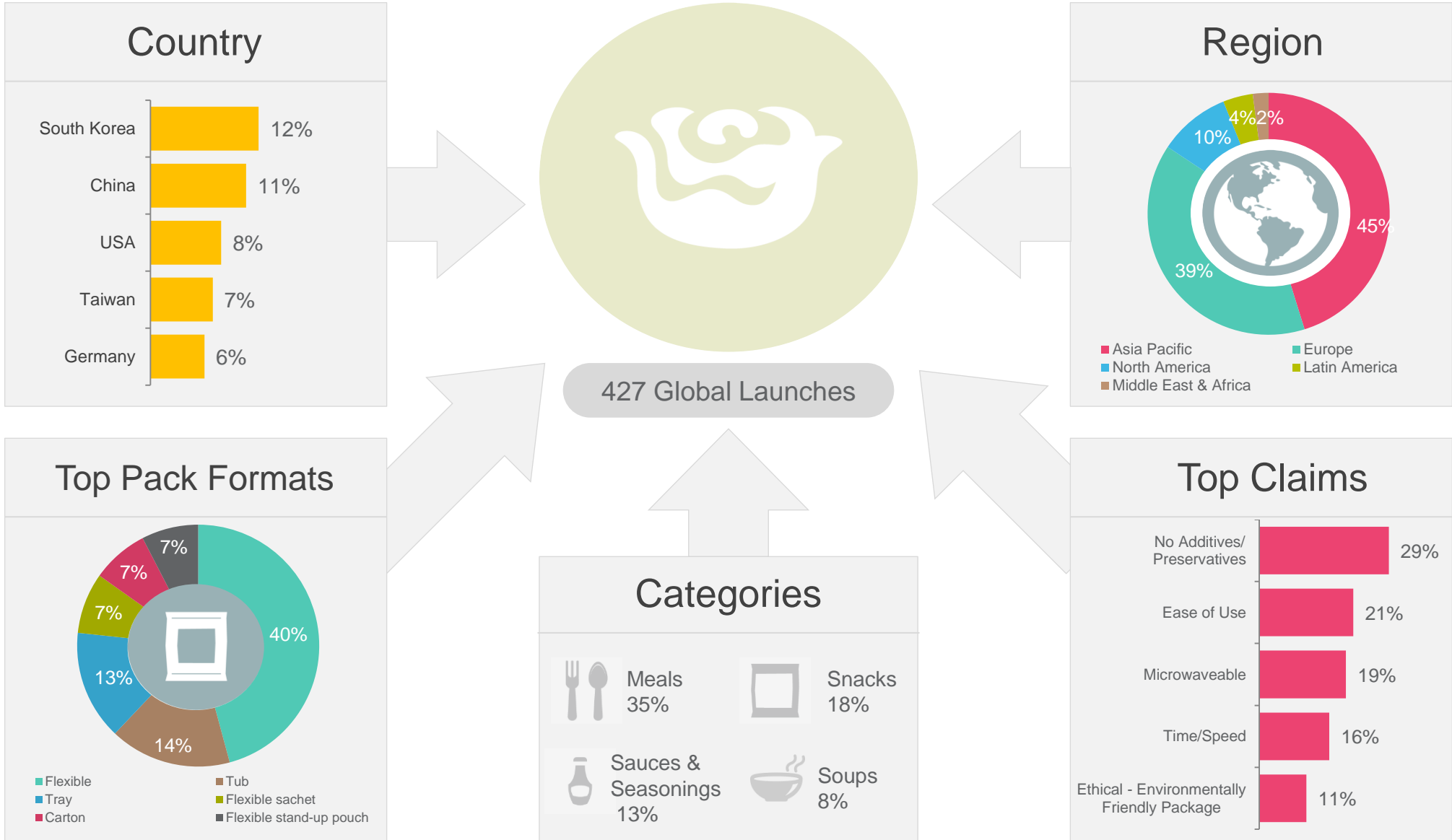


# Trends: Cabbage

# Cabbage Global NPDs

## December 2015 – April 2016

There were 427 global launches of products containing Cabbage as an ingredient. The majority of launches occurred in Asia Pacific and Europe. No additives/preservatives and ease of use claims were common with products launched. The most commonly launched product were meals and snacks, consistent with previous waves.





# Cabbage Product Launches: Last 3 Months (December 2015 – April 2016) Summary

- There were 427 products containing cabbage as an ingredient that were launched globally. This was consistent with the number of launches in the previous wave.
- There were four Australian launches generally consisting of dumplings, soups and stock.
- Asia Pacific (45%) and Europe (39%) were the dominant launch regions for cabbage products. South Korea and China were the main countries for launches.
- A large proportion of products launched were meals and meal centres (35%). Snacks (18%) and sauces and seasonings (13%) were also common categories for products.
- No additives/preservatives was the top claim utilised (29%). Convenience claims were also common, including ease of use (21%) and microwaveable (19%).
- The most innovative product launched was 7-Eleven Hyeri Seven Side Dish Lunch Box in South Korea (see following pages).



Source: Mintel (2016)

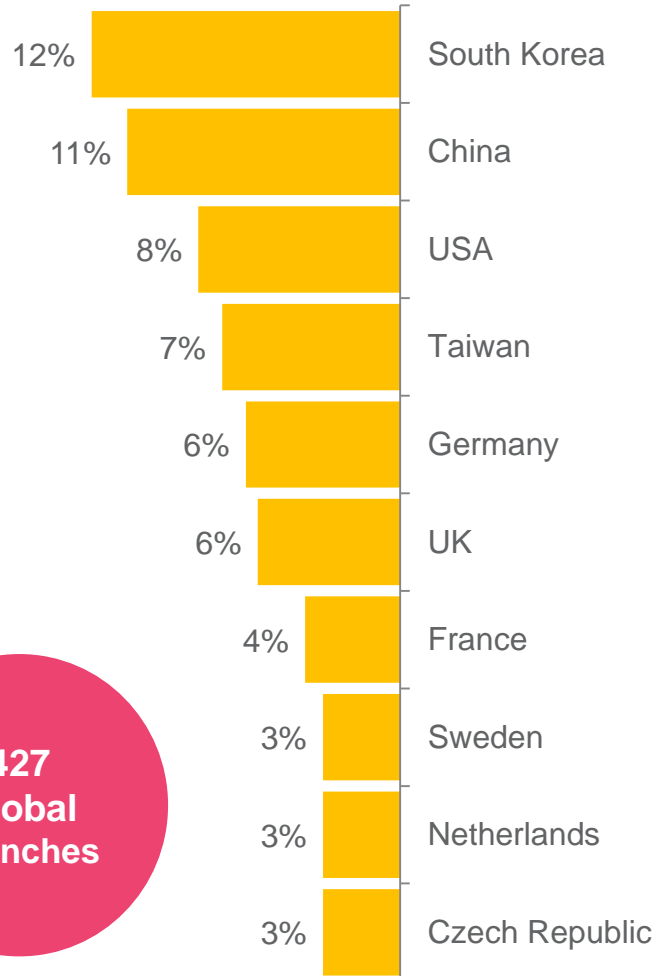


# Cabbage Launches

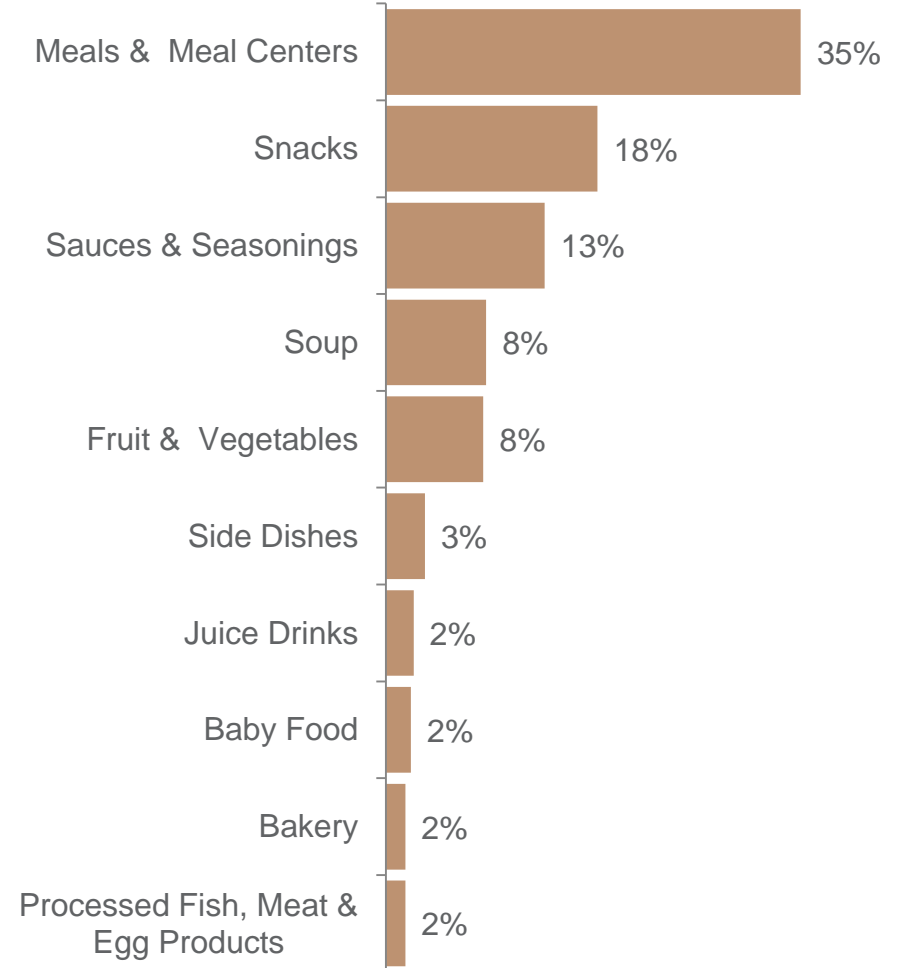
## Country & Categories

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

### Top 10 Launch Countries



### Top 10 Launch Categories












**427**  
Global  
Launches














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

### Pack Formats Used

Global		Flexible	40%
		Tub	14%
		Tray	13%
Asia Pacific		Flexible	56%
		Flexible sachet	10%
		Tub	9%
Europe		Tub	23%
		Flexible	22%
		Tray	20%

### Top Claims Used

Global		No Additives/Preservatives	29%
		Ease of Use	21%
		Microwaveable	19%
Asia Pacific		No Additives/Preservatives	36%
		Time/Speed	22%
		Ease of Use	18%
Europe		Microwaveable	26%
		No Additives/Preservatives	23%
		Ease of Use	23%

# ➤➤➤ Innovative Cabbage Launches: L3M (December 2015 – April 2016)

## AH Babi Pangang with Fried Noodles (Netherlands)

AH Babi Pangang met Bami (Babi Pangang with Fried Noodles) has been relaunched with a new formulation and retails in a new 500g pack. This microwaveable meal comprises cooked pork strips with sweet sour sauce and fried noodles, and contains no milk.



**Claims:**  
Microwaveable, Low/No/Reduced Allergen

## UG Burger Dressing (Denmark)

UG Burger Dressing is now available. The product retails in a 250g pack.



**Claims:**  
N/A

## Ajinomoto Vegetable Gyoza (France)

Ajinomoto Gyoza Légumes (Vegetable Gyoza) is said to be based on an authentic Japanese recipe. The product can be cooked in a pan or steam heated. It retails in a partly-recyclable 200g pack containing 10 units.



**Claims:**  
Ethical - Environmentally Friendly Package

## Nabisco Ritz Fresh Stacks Roasted Vegetable Crackers (USA)

Nabisco Ritz Fresh Stacks Roasted Vegetable Crackers have been repackaged with a new look. The crackers are kosher certified, and retail in a recyclable 11.5-oz. pack made from 100% recycled paperboard with a minimum 35% post-consumer content, containing eight individually wrapped fresh stacks containing about 13 crackers each.



**Claims:**  
Kosher, Ethical - Environmentally Friendly Package

# »»» Innovative Cabbage Launches: L3M (December 2015 – April 2016)

## Torie & Howard Organic Hard Candy (USA)

Torie & Howard Organic Hard Candy has been repackaged and is now available in a newly designed pack. The USDA Organic product is made with natural fruit flavors and comprises the following varieties: blood orange and honey; pomegranate and nectarine; d'anjou pear and cinnamon; and pink grapefruit and tupelo honey. It is kosher certified and free from artificial dyes, corn syrup, casein, nuts, gluten, soy, GMO, wheat and dairy.



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

## Ainsley Harriott Minestrone Soup (UK)

Ainsley Harriott Minestrone Soup is made with carrot, onion, cannellini beans and spaghetti. The vegetarian product is said to feature a warm comforting taste, can be microwaved in two minutes, and retails in a 385g resealable and partially recyclable pack featuring the Facebook and Twitter logos.



**Claims:**  
Microwaveable, Vegetarian, Ethical - Environmentally Friendly Package, Convenient Packaging, Social Media

## Lotte Fresh B Breath Grapefruit Mint Flavour Candy (South Korea)

Lotte Fresh B Breath Grapefruit Mint Flavour Candy is now available. This product contains xylitol and 0.01% grapefruit juice concentrate. This product is claimed to neatly refresh breath and retails in a 22g pack.



**Claims:**  
Breath-Freshening

## Marqt Crave Good Food Rice Paper Salad Rolls with Peanut Satay Sauce (Netherlands)

Crave Good Food for Marqt Rice Paper Salad Rolls met Pinda Satésaus (Rice Paper Salad Rolls with Peanut Satay Sauce) are fresh and ready to eat Vietnamese salad rolls filled with crispy vegetables, vermicelli noodles and fresh herbs, that combined with the spicy dip sauce provide a healthy and tasty lunch. The product is suitable for vegetarians and retails in a 190g pack.



**Claims:**  
Vegetarian, Ease of Use

# »»» Innovative Cabbage Launches: L3M (December 2015 – April 2016)

## Palmers Digestive Pan Vegetable Biscuit (Malaysia)

Palmers Digestive Pan Biscuit Biskut Perisa Sayuran (Vegetable Biscuit) contains natural antioxidant from cabbage and is a source of dietary fibre. This halal certified product is retailed in a 150g pack of 12 individual packs.



**Claims:**  
Halal, Antioxidant

## Innocent Apple, Pear, Spinach, Green Cabbage and Baobab Green Smoothie (Austria)

Innocent Apfel, Birne, Spinat, Grünkohl & Baobab Green Smoothie (Apple, Pear, Spinach, Green Cabbage and Baobab Green Smoothie) is a blend of juices and purées from sustainably grown apples, pears, spinach, green cabbage and baobab. The pasteurised product is suitable for vegans, is a source of vitamin C which contributes to a healthy immune system function and retails in a 250ml bottle featuring a Facebook logo. The manufacturer donates 10% of the profits to charity.



**Claims:**  
Immune System (Functional), Ethical - Environmentally Friendly Product, Ethical - Charity, Vegan, No Animal Ingredients, Social Media  
Social Media, Event Merchandising, Children (5-12)

## 7-Eleven Hyeri Seven Side Dish Lunch Box (South Korea)

7-Eleven Hyeri Seven Side Dish Lunch Box comes with cooked rice and seven different side dishes. This microwaveable product is ready in one minute and 50 seconds, and retails in a 424g pack featuring the South Korean singer and actress, Hyeri.



**Claims:**  
Microwaveable

## Lidl Stánek Coleslaw (Czech Republic)

Lidl Stánek Coleslaw Salát (Coleslaw) has been relaunched, featuring a new brand. The product is retailed in a 300g pack, and comprises cabbage, horseradish, carrot, onion and mayonnaise.



**Claims:**  
N/A



# Australian Cabbage Launches: L3M (December 2015 – April 2016)

## Hart & Soul All Natural Hot Korean Soup

Hart & Soul All Natural Hot Korean Soup is a traditional Korean kimchi style soup with cabbage, tofu and chicken. This 100% natural product is dairy- and GMO-free and contains no artificial colours, flavours or preservatives. This product retails in an 85g pack featuring the Facebook and Instagram logos.



**Claims:**  
No Additives/Preservatives, All Natural Product, Low/No/Reduced Allergen, GMO-Free, Social Media

## Hanabi Tasty Bites Pork Potstickers

Hanabi Tasty Bites Pork Potstickers are pan fried dumplings known as Guotie or Yaki Gyoza. They are shallow fried where the base of the potstickers is fried until crispy and golden brown and the upper part is steamed to give a contrast texture. The fillings are mixed with chopped vegetables wrapped with three or five folds in the dough. The product can be eaten with soy sauce or a dipping sauce with vinegar, garlic, ginger and sesame oil.



**Claims:**  
Ease of Use, Time/Speed, Microwaveable

## Chiko Original Chiko Rolls

Chiko Original Chiko Rolls have been repackaged to celebrate Australia's Day. The product is free from artificial flavours and preservatives and retails in a 650g pack containing four units.



**Claims:**  
No Additives/Preservatives

## Lai Shing Dim Sim Factory Pork Dim Sim

Lai Shing Dim Sim Factory Pork Dim Sim is hand made. This MSG-free product can be steamed in 10 minutes and retails in a 600g pack containing 12 pieces.



**Claims:**  
No Additives/Preservatives





Celery.





Purchase and consumption have both declined this wave.



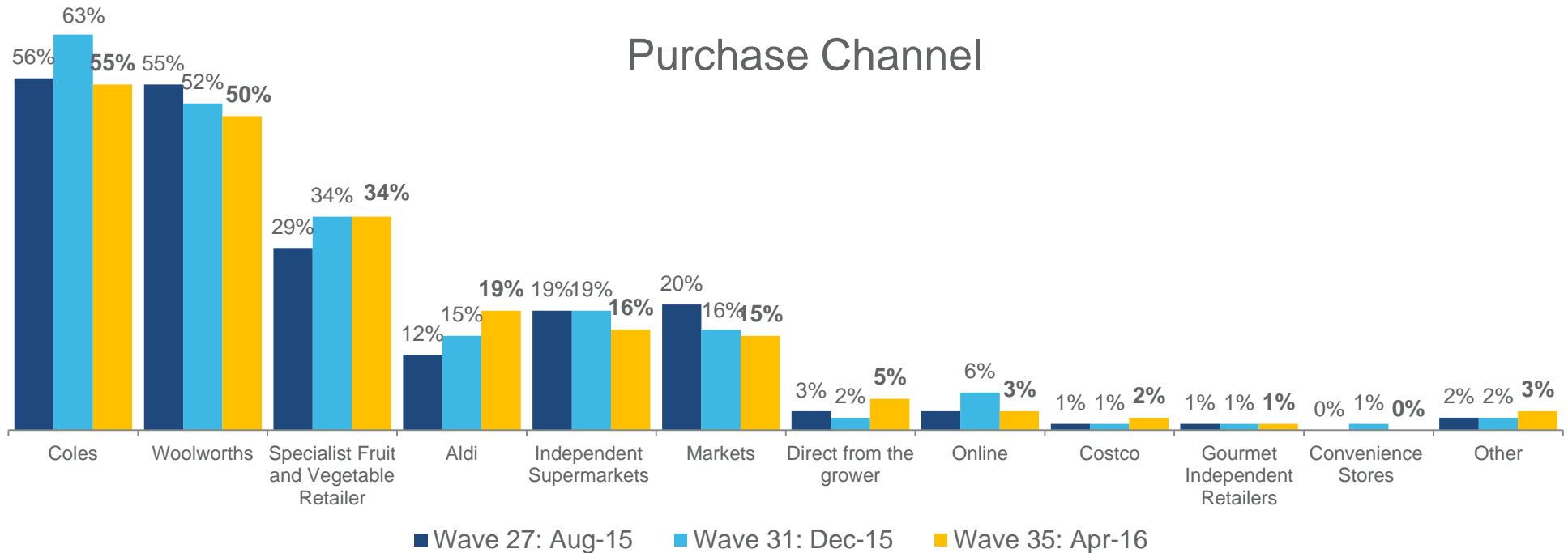
Coles is the key retail channel for purchase of celery. Additionally, Aldi has steadily increased as a purchase channel over the last three waves.



- ▲ 3.2 times, Wave 27
- ▲ 3.1 times, Wave 31



- ▲ 9.6 times, Wave 27
- ▲ 9.9 times, Wave 31



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 27 N=301, Wave 31 N=307, Wave 35 N=310



# Average Spend and Price Sensitivity



Average weight of purchase

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

■ 800g, Wave 27  
▲ 900g, Wave 31



Recalled last spend

The average recalled last spend on celery was **\$2.80**, in line with past months.

■ \$2.80, Wave 27  
▼ \$2.70, Wave 31



Value for money

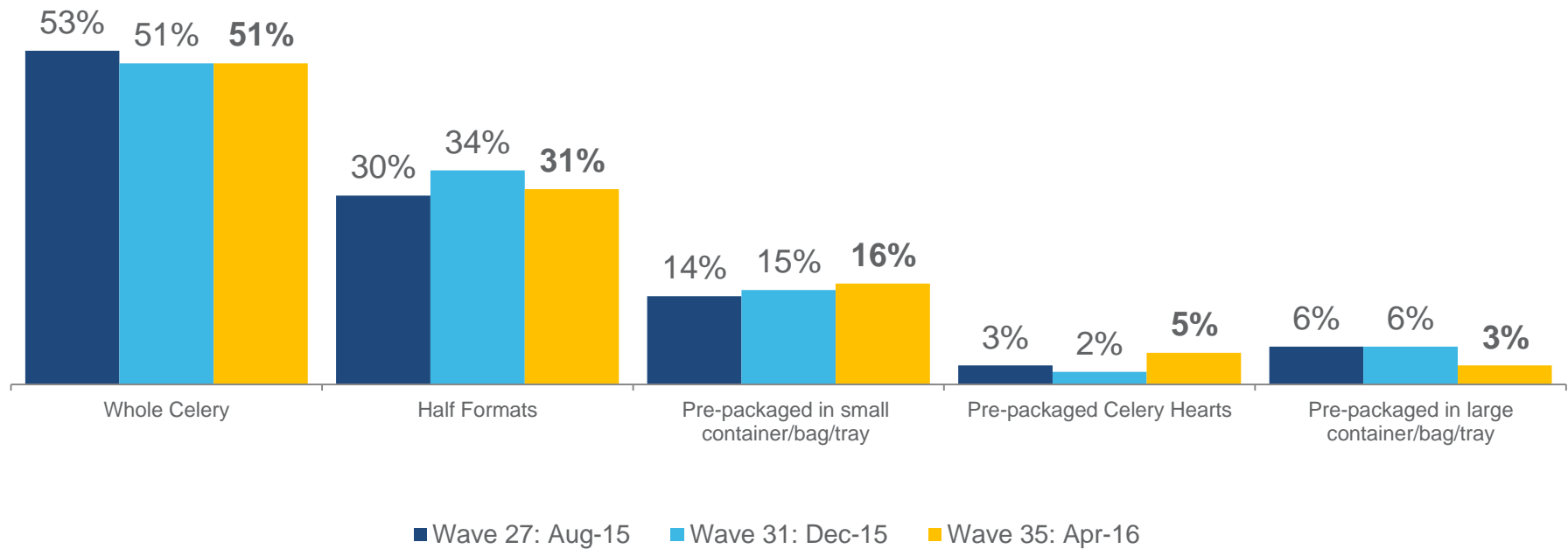
On average, consumers perceive celery to be good value for money (**6.7/10**), which has increased this wave.

▼ 6.4/10, Wave 27  
▼ 6.5/10, Wave 31

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 27 N=301, Wave 31 N=307, Wave 35 N=310



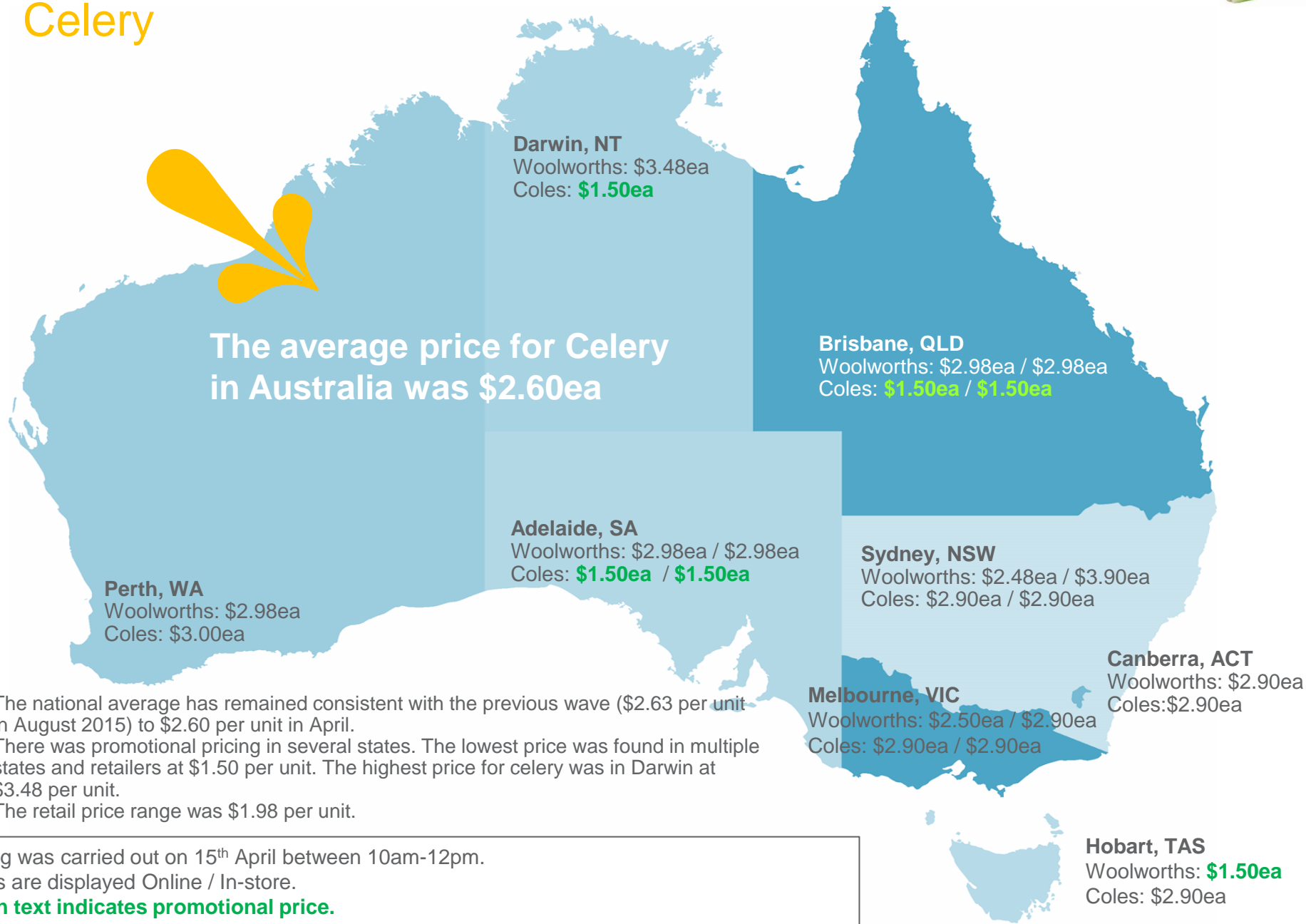
Over half of consumers purchase whole celery formats. Half and pre-packaged options are also popular formats.



Q4b In what fresh formats do you typically purchase Celery?  
Sample Wave 27 N=301, Wave 31 N=307, Wave 35 N=310

# Online and In-store Commodity Prices

## Celery



- The national average has remained consistent with the previous wave (\$2.63 per unit in August 2015) to \$2.60 per unit in April.
- There was promotional pricing in several states. The lowest price was found in multiple states and retailers at \$1.50 per unit. The highest price for celery was in Darwin at \$3.48 per unit.
- The retail price range was \$1.98 per unit.

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



Spontaneous awareness of celery varieties remains very low, with 83% of consumers unable to recall a type.

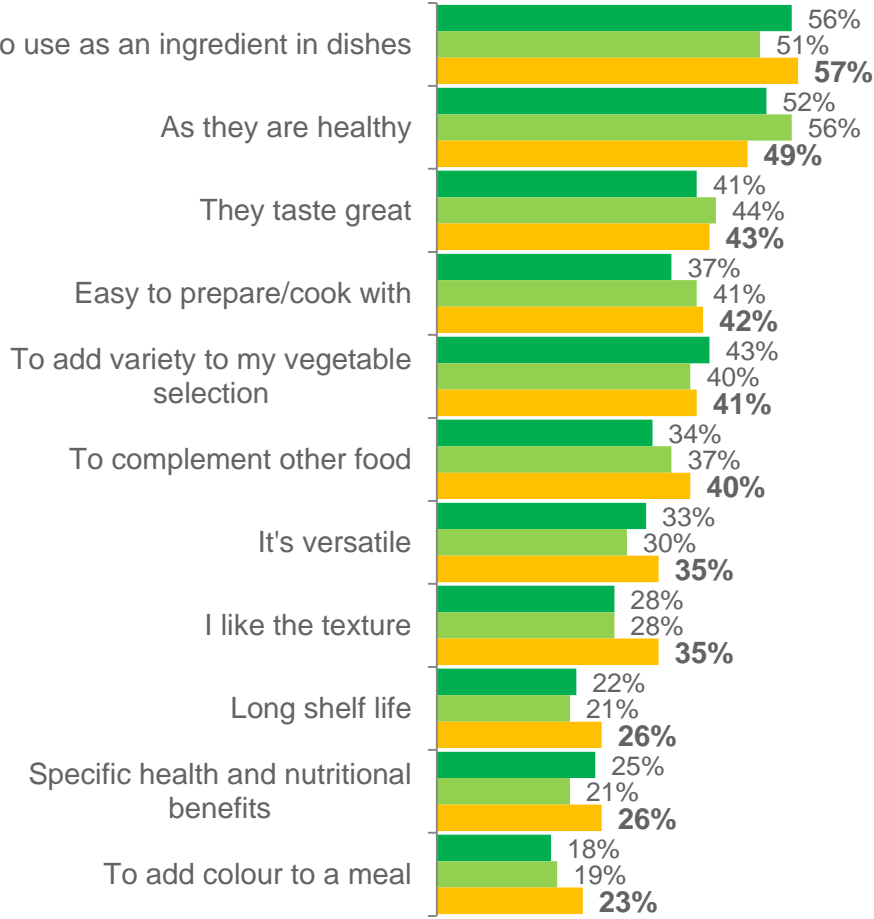
- ▶ Consumers who stated a type of celery recall the 'normal' one and 'green' types.





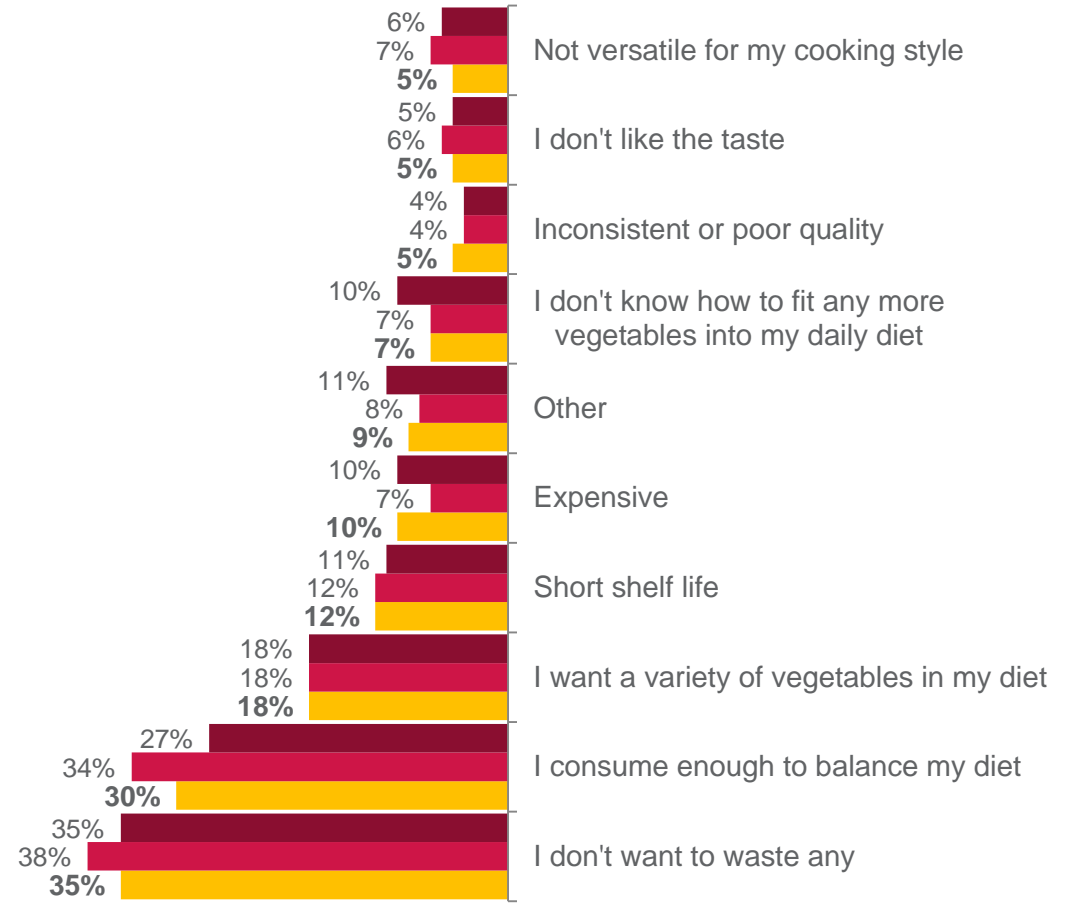
Use as an ingredient, health and taste are the key triggers of purchase. In contrast, not wanting to waste any and already consuming enough are the barriers preventing future purchase.

### Triggers



■ Wave 27: Aug-15   ■ Wave 31: Dec-15   ■ Wave 35: Apr-16

### Barriers



■ Wave 27: Aug-15   ■ Wave 31: Dec-15   ■ Wave 35: Apr-16

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 27 N=301, Wave 31 N=307, Wave 35 N=310



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

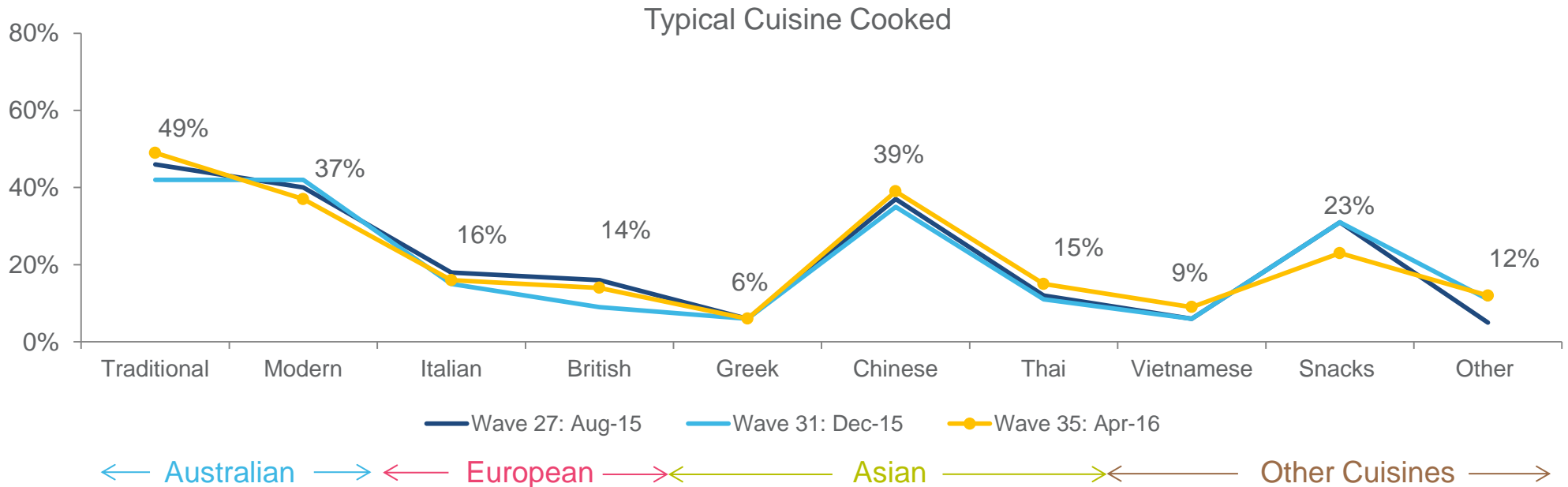
Dinner and family meals remain the predominant occasions for celery consumption.

### Top 5 Consumption Occasions

	Wave 31	Wave 35
Dinner	54%	62%
Family Meals	46%	53%
Weekday Meals	35%	46%
Weekend Meals	32%	43%
Quick Meals	38%	41%

**12%** used celery when cooking a new recipe

▼ 11%, Wave 31



Q10. What cuisines do you cook/consume that use <commodity> ?  
Q11. Which of the following occasions do you typically consume/use <commodity> ?  
Sample Wave 27 N=301, Wave 31 N=307, Wave 35 N=310



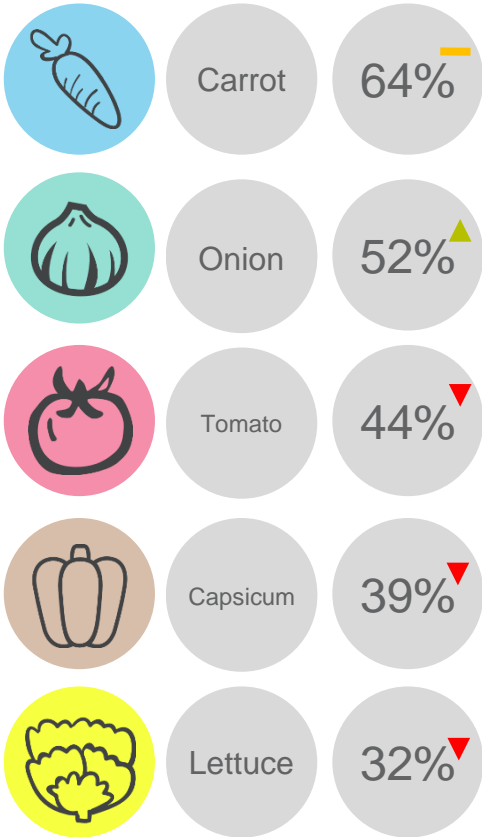
▼ : Indicates LOWER score than current wave.  
▲ : Indicates HIGHER score than current wave.



Carrot, onion and tomatoes are typically served with celery. Celery is more likely to be consumed raw, stir fried or cooked in soups.



Accompanying Vegetables



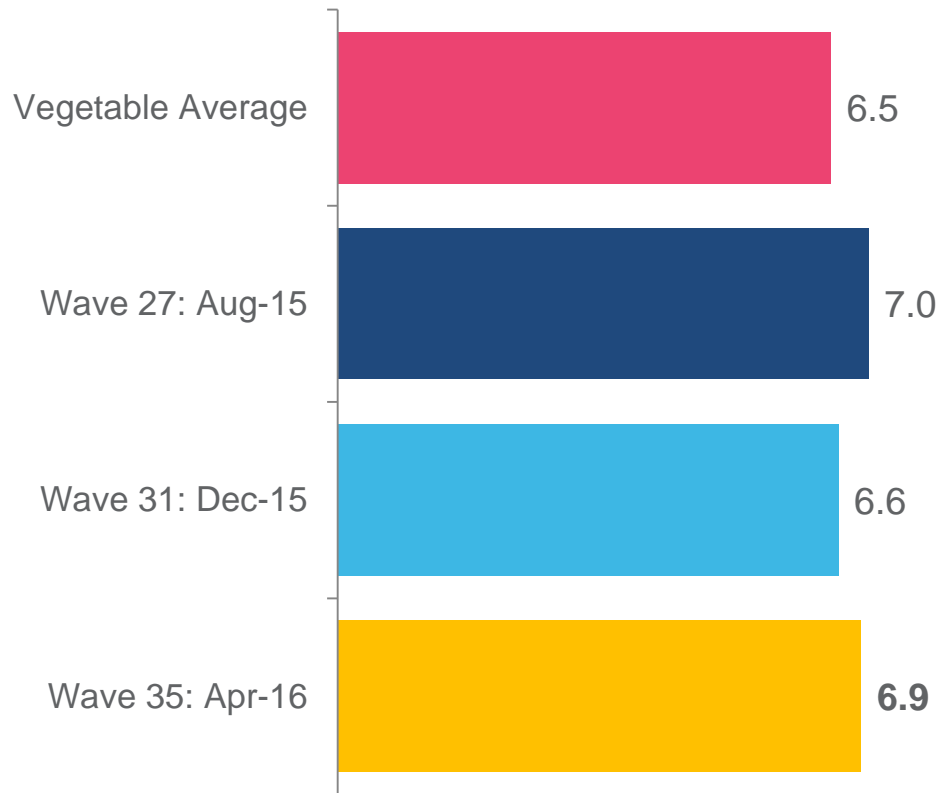
Top Cooking Styles

	Wave 27	Wave 31	Wave 35
Raw	62%	70%	60%
Stir frying	53%	47%	54%
Soup	53%	39%	53%
Slow Cooking	26%	16%	28%
Sautéing	14%	10%	15%
Steaming	8%	7%	10%
Boiling	9%	7%	9%
Frying	9%	6%	7%
Other	5%	7%	7%
Roasting	4%	3%	4%

Q9. How do you typically cook <commodity> ?  
 Q10a. And when are you serving <commodity> which of the following do you also serve together with this?  
 Sample Wave 27 N=301, Wave 31 N=307, Wave 35 N=310



The importance of celery provenance has increased since the previous wave, but still remains lower than the provenance recorded in August 2015.



Q14. When purchasing <commodity>, how important is Provenance to you?  
Q15. And when purchasing Celery, how important is that it is grown in Australia?  
Sample Wave 27 N=301, Wave 31 N=307, Wave 35 N=310





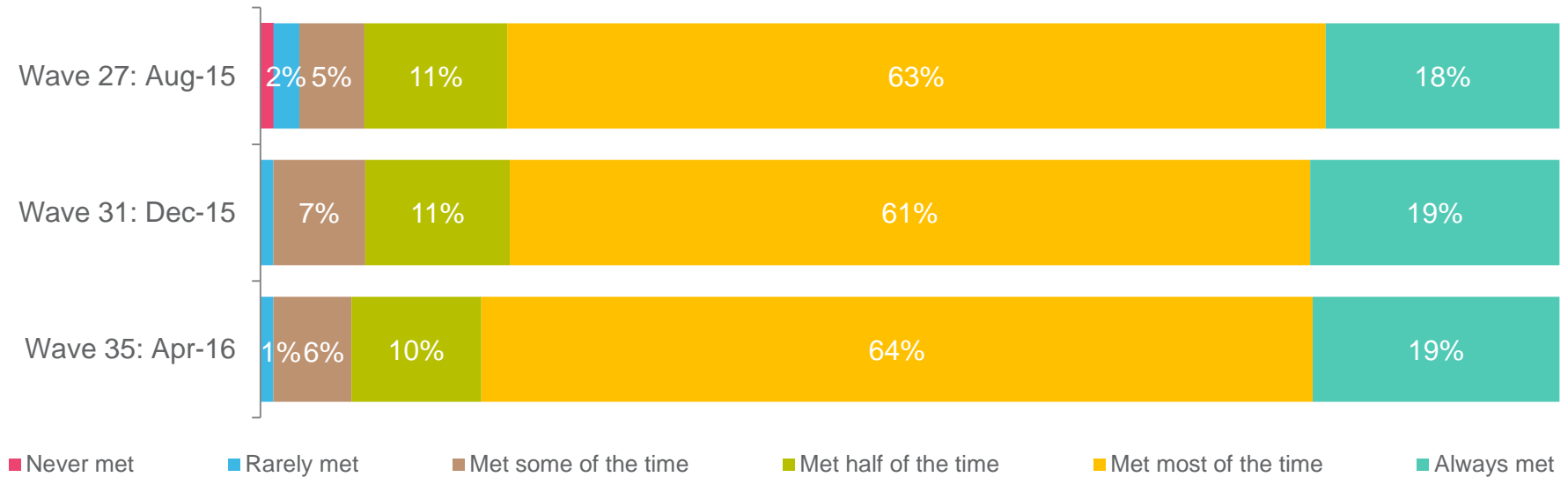
Celery is expected to remain fresh for ten days after purchase, slightly higher than previous waves.

The likelihood of freshness expectations being met has remained stable.

Expected to stay fresh for **10.4 days**

- ▼ 10.2 days, Wave 27
- ▼ 9.8 days, Wave 31

### 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 27 N=301, Wave 31 N=307, Wave 35 N=310



# Trends: Celery



# Celery NPDs

## Global

December 2015 – April 2016

There were 1070 products containing celery launches in the past three months. Launches primarily occurred in Europe. USA and Germany were the most popular launch countries. Categories for launch were sauces, meals and soups.





# Celery Product Launches: Last 3 Months (December 2015 – April 2016) Summary

- Consistent with previous trends, a large number of products (N=1070) containing celery as an ingredient were launched globally in the last three months.
- There were 20 products launched in Australia, which was consistent with the previous wave.
- The majority of launches occurred in Europe (57%). Key countries for launch were USA and Germany.
- Flexible packaging (18%) and trays (15%) were the main packaging types used for products.
- Sauces and seasoning (22%), meals (21%) and soups (16%) were the main categories for launches.
- Core claims used were no additives or preservatives (30%) and microwavable (26%).
- The most innovative product launch this wave was a Pineapple, Celery and Nopal Flavoured Drinking Yoghurt from Mexico. Examples of other innovative launches can be found on the following pages.



Source: Mintel (2016)

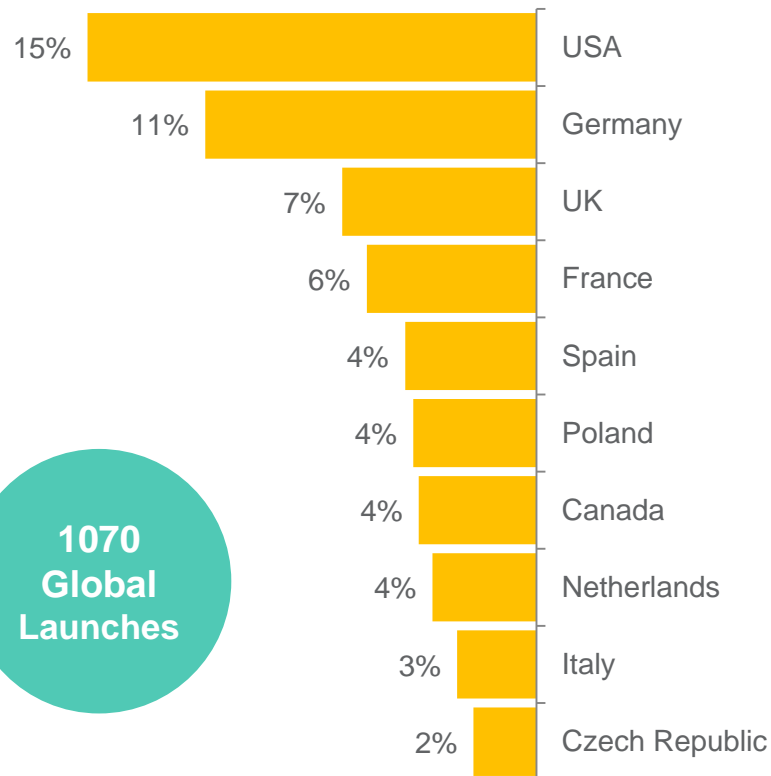




# Celery Launches

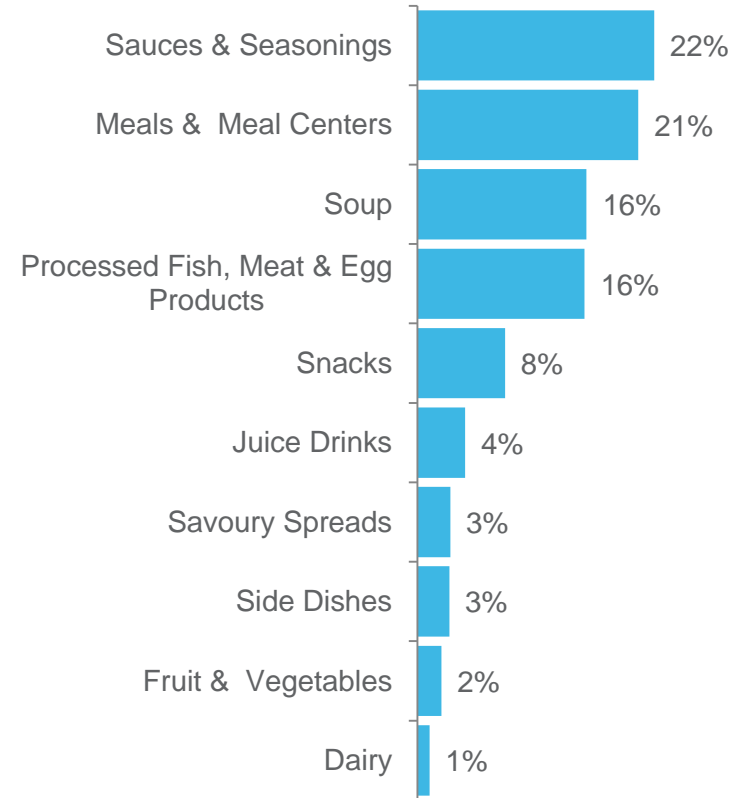
- USA and Germany continue to produce the greatest number of products containing celery.
- Sauces, meals, soups and processed products are the main categories for products launched, consistent with previous waves.

## Top Launch Countries



1070  
Global  
Launches

## Top Launch Categories

























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

### Pack Formats Used

Global		Flexible	18%
		Tray	15%
		Jar	12%
Europe		Tray	20%
		Flexible	16%
		Jar	14%
North America		Skinpack	21%
		Flexible	12%
		Can	11%

### Top Claims Used

Global		No Additives/Preservatives	30%
		Microwaveable	26%
		Ethical - Environmentally Friendly Package	19%
Europe		No Additives/Preservatives	28%
		Microwaveable	25%
		Ethical - Environmentally Friendly Package	20%
North America		No Additives/Preservatives	38%
		Microwaveable	38%
		Low/No/Reduced Allergen	33%

# ➤➤➤ Innovative Celery Launches: L3M (December 2015 – April 2016)

## Danone Activia Pineapple, Celery and Nopal Flavored Drinking Yogurt (Mexico)

Danone Activia Alimento Lácteo Fermentado con Piña, Apio y Nopal (Pineapple, Celery and Nopal Flavored Drinking Yogurt) has been repackaged with an updated design. The product is made with ActiRegularis probiotic that helps maintain a healthy digestive system by regulating slow intestinal transit, and retails in a 240ml bottle.



**Claims:**  
Digestive (Functional)

## Mike Mitchell's Spicy BBQ Noodles (Germany)

Mike Mitchell's Spicy BBQ Noodles are now available. This American style product retails in a 67.5g pack and can be prepared in five minutes.



**Claims:**  
Time/Speed

## Marca Guia Côté Table Crepes with Cooked Ham and Emmental Cheese Filling (Spain)

Marca Guia Côté Table Crepes Rellenas de Jamón Cocido y Queso Emmental (Crepes with Cooked Ham and Emmental Cheese Filling) are suitable for microwaving. The pre-cooked, deep frozen product is said to have a delicious filling, and retails in a 300g pack containing 6 x 50g crepes.



**Claims:**  
Microwaveable

## Atyab Fun Nuggets (Egypt)

Atyab Fun Nuggets are now available. This product is fully cooked and retails in a 400g pack, featuring a design aimed at children.



**Claims:**  
Children (5-12)

# »»» Innovative Celery Launches: L3M (December 2015 – April 2016)

## PnP...To Heat Arrabbiata Sauce (South Africa)

PnP...To Heat Arrabbiata Sauce is a spicy pasta sauce made from fresh tomatoes slow cooked in olive oil. The just heat and eat hot sauce is suitable for vegans and can be heated in a microwave. This product is suitable for home freezing and retails in a 300g pack.



**Claims:**  
Microwaveable, Vegan, Ease of Use, No Animal Ingredients

## Hellers Captain Crunch's Pork Nuggets (New Zealand)

Hellers Captain Crunch's Pork Nuggets are free of artificial colours and added preservatives. The product is targeted at children and retails in a 1kg pack containing approximately 45 units.



**Claims:**  
No Additives/Preservatives, Children (5-12)

## Suja Mighty Greens Organic Fruit & Vegetable Juice Drink (USA)

Suja Mighty Greens Organic Fruit & Vegetable Juice Drink has been relaunched under a new brand. The product, with 97% juice, includes apple, celery, cucumber, kale, collard greens, lemon, ginger, mint tea, spinach, spirulina, chlorella, barley grass and alfalfa grass. This certified USDA organic and kosher product is non GMO project verified, is cold pressure protected, is vegan friendly, is gluten free, contains no added sweeteners, and retails in a 12-fl. oz. BPA free bottle.



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

## Farmer Angus' Beef Bone Broth (South Africa)

Farmer Angus' Beef Bone Broth is described as an ancient elixir and is made with beef bones, rainwater, organic and non-irradiated carrots, onions, celery, garlic, vinegar, turmeric, rosemary, parsley, black pepper and bay leaves. The product contains no added salt and retails in a 1L glass jar.



**Claims:**  
Organic, Low/No/Reduced Sodium

# »»» Innovative Celery Launches: L3M (December 2015 – April 2016)

## Poltino Pyszna Zupa Tomato Cream Soup with Basil (Poland)

Poltino Pyszna Zupa Krem Pomidorowy z Bazylia (Tomato Cream Soup with Basil) is made from 100% natural ingredients, contains only Polish vegetables and no artificial additives. It can be easily prepared in few minutes in a pot or microwave. This deep frozen product is said to preserve all the nutrients and is conveniently portionable in order to save time and energy. The soup can be served with croutons, cream or fresh herbs, and retails in a 450g pack.



**Claims:**  
No Additives/Preservatives, All Natural Product, Microwaveable, Time/Speed, Portionability, Ease of Use

## Lidl Stánek Beetroot Salad (Czech Republic)

Lidl Stánek Salát z Cervené Repy (Beetroot Salad) is now available. The product contains no added preservatives and retails in a 300g pack.



**Claims:**  
No Additives/Preservatives

## Pepperidge Farm Goldfish Cheddar Flavoured Baked Snack Crackers (Canada)

Pepperidge Farm Goldfish Cheddar Flavoured Baked Snack Crackers have been repackaged with a new look to promote the Disney Pixar movie Finding Dory. The crackers are baked with real cheese and contain no artificial colours or flavours. The product retails in a limited edition 180g pack featuring a Facebook link and a children's game.



**Claims:**  
No Additives/Preservatives, Children (5-12), Event Merchandising, Limited Edition, Social Media

## McCormick Gourmet Celery Salt (Canada)

McCormick Gourmet Celery Salt has been repackaged with a new design. It is a blend of salt and ground celery seed, perfect for chicken, seafood and veal. It can be added to potato and macaroni salads, salad dressings, corn, carrots, stewed tomatoes and stuffed eggs. The kosher certified product retails in an 84g pack.



**Claims:**  
Kosher



# Australian Celery Launches: L3M (December 2015 – April 2016)

**Colway Roasted Garlic & Sundried Tomato Mustard**



**Chris' Fun-Size Snacks 'Lil' Christos Corn Relish Dips**



**Heinz Tomato, Red Pepper & Black Bean Soup with Chipotle Chillies**



**Big Tom Spiced Tomato Juice**



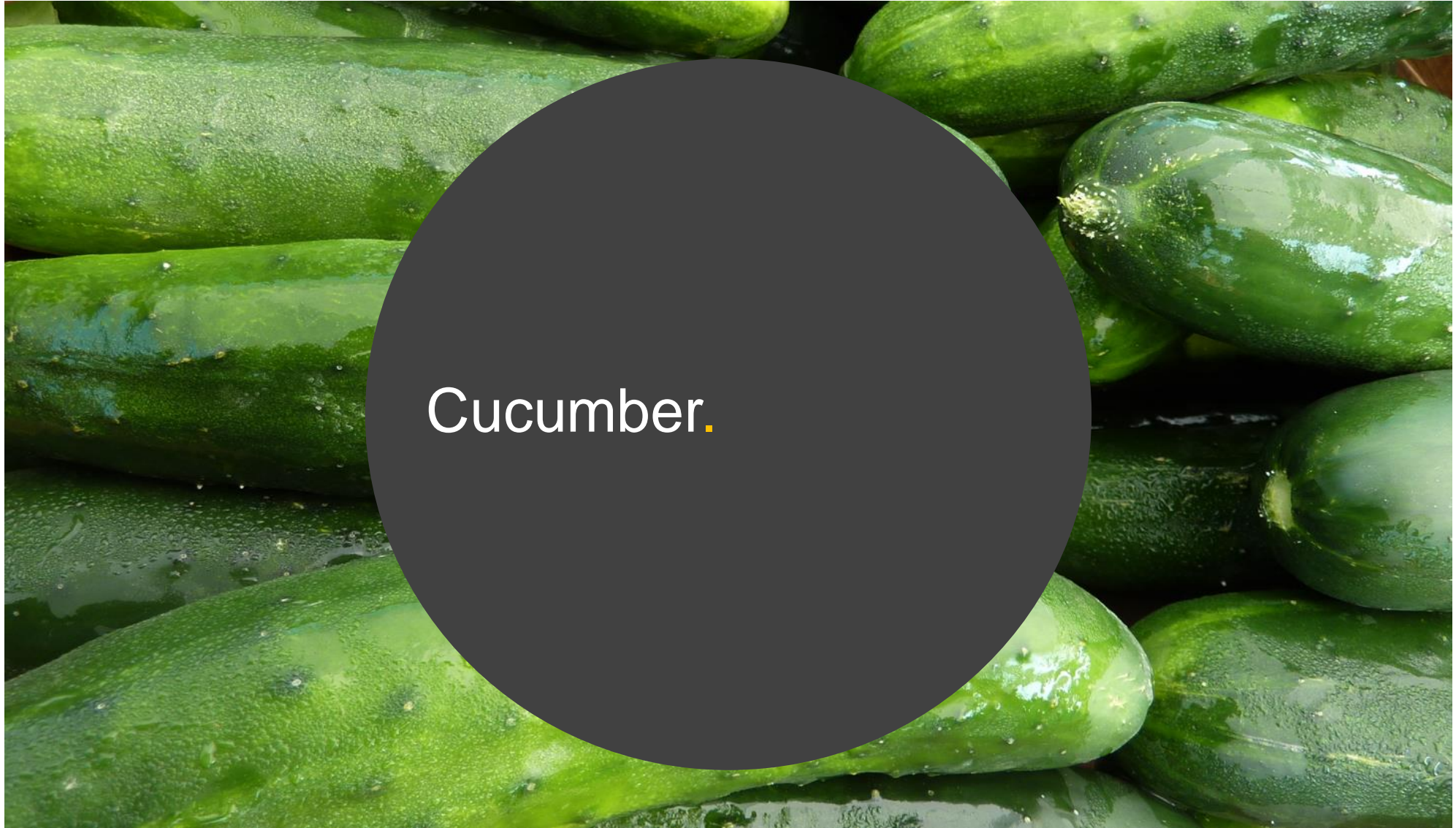
**John West Special Edition Fiery Chipotle Tuna**



**Continental Cup a Soup Homestyle Mushroom Soup**







Cucumber.





»»»→ Cucumber purchase and consumption has slightly declined this wave. On average, cucumbers are eaten three times per week.

Key channels for purchase are mainstream retailers. Over the past three waves there has been an incline in purchase from Aldi, and a decline in markets.

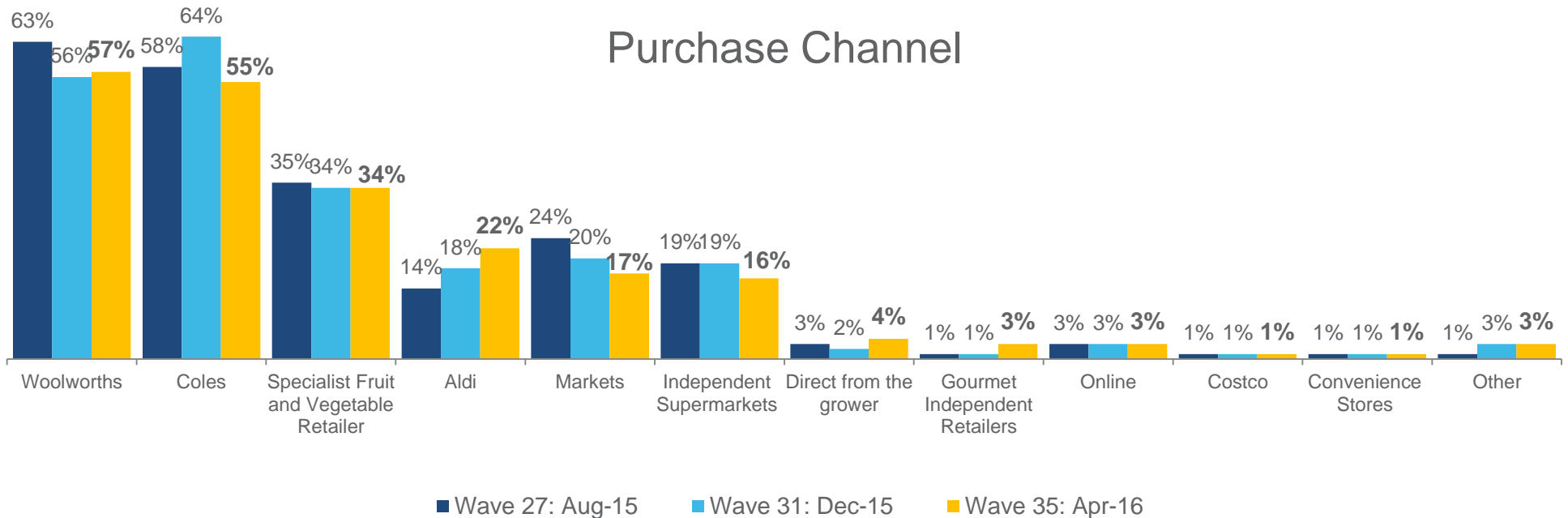


- ▲ 4.4 times, Wave 27
- ▲ 4.3 times, Wave 31



- ▼ 11.9 times, Wave 27
- ▲ 12.3 times, Wave 31

### 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 27 N=306, Wave 31 N=306, Wave 35 N=310



# Average Spend and Price Sensitivity



Average weight of purchase

The average consumer typically purchases **700g** of cucumber, which is slightly higher than the previous wave.

- ▲ 800g, Wave 27
- ▼ 600g, Wave 31



Recalled last spend

The average recalled last spend is **\$2.80**, which is relatively consistent with the previous waves.

- \$2.80, Wave 27
- ▼ \$2.60, Wave 31



Value for money

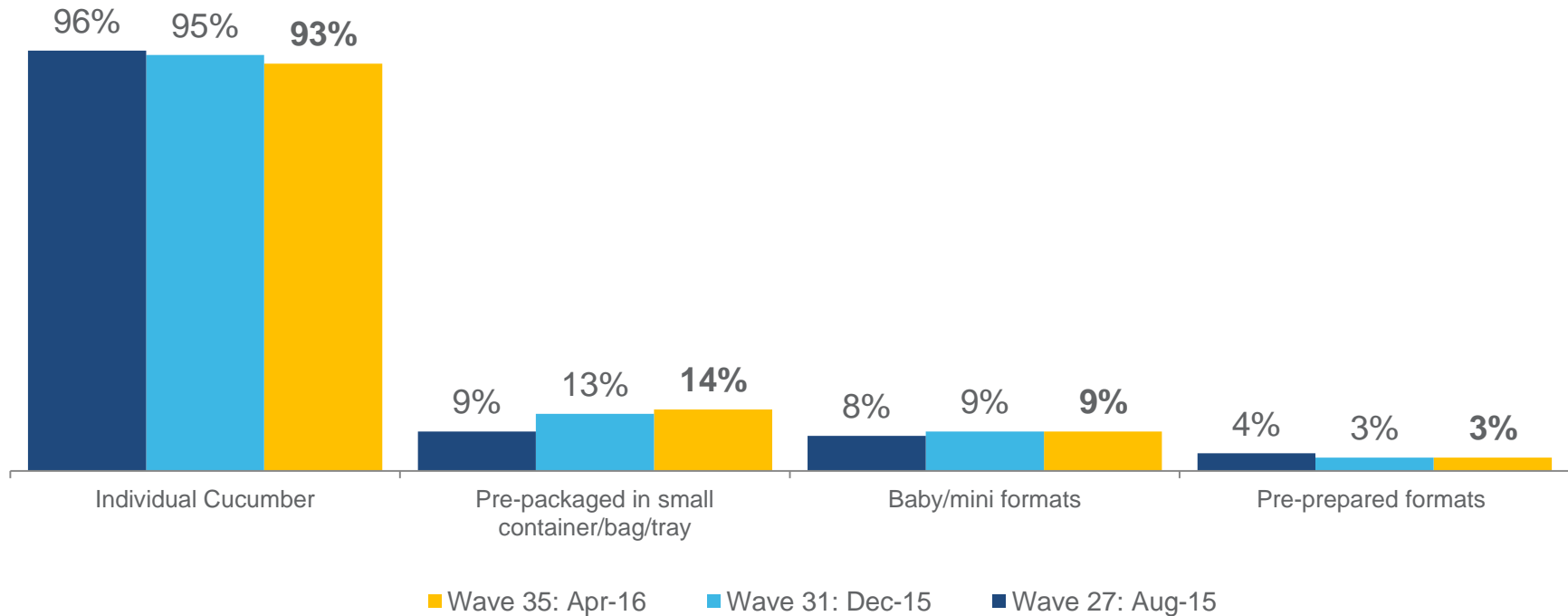
On average, consumers perceive cucumber to be good value for money (**6.6/10**), which has increased over the last three waves.

- ▼ 6.2/10, Wave 27
- ▼ 6.4/10, Wave 31

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 27 N=306, Wave 31 N=306, Wave 35 N=310



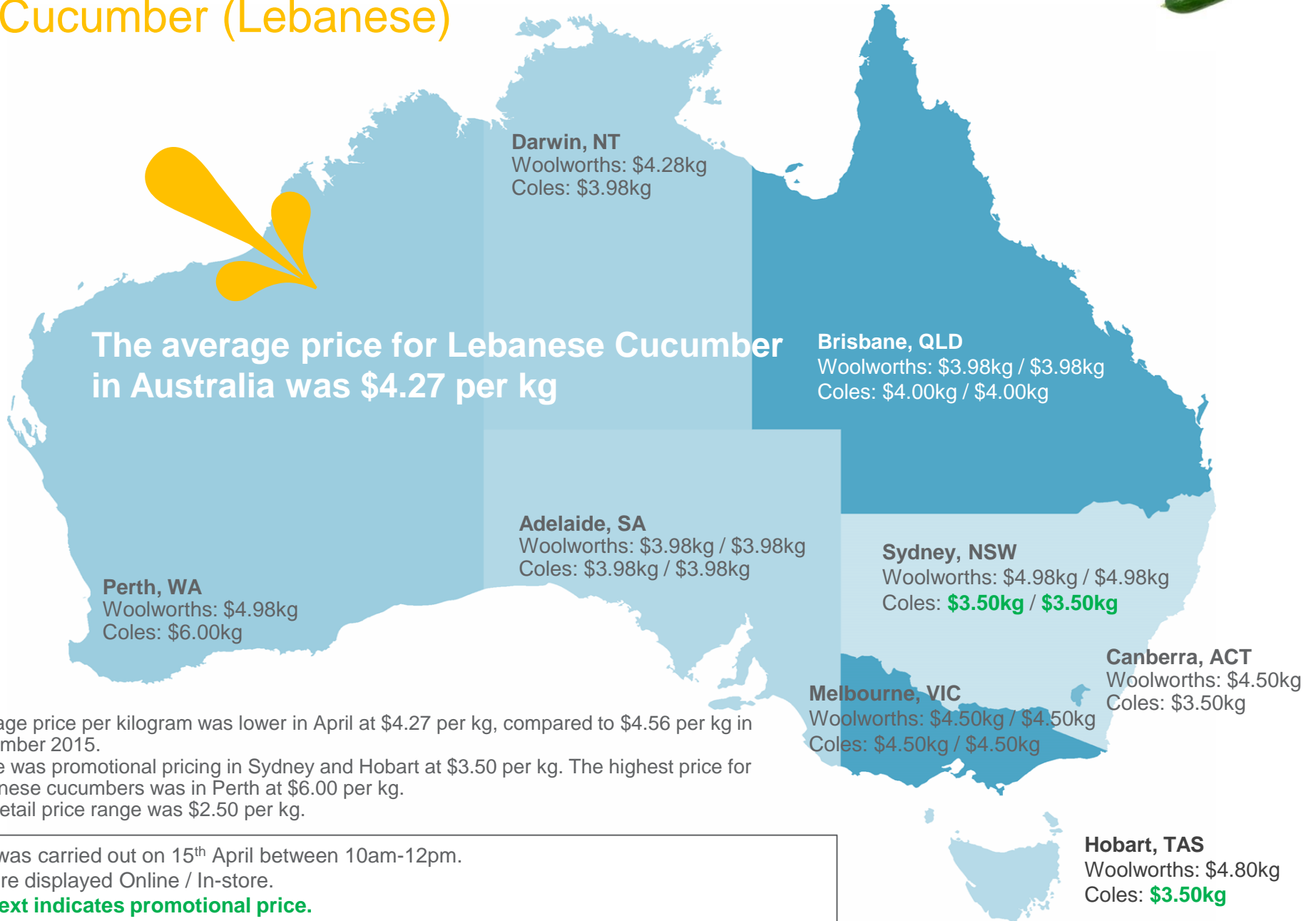
Consumers primarily purchase individual cucumbers. There is a small market for pre-packaged and baby cucumber formats.



Q4b In what fresh formats do you typically purchase Cucumber?  
Sample Wave 27 N=306, Wave 31 N=306, Wave 35 N=310



# Online and In-store Commodity Prices Cucumber (Lebanese)

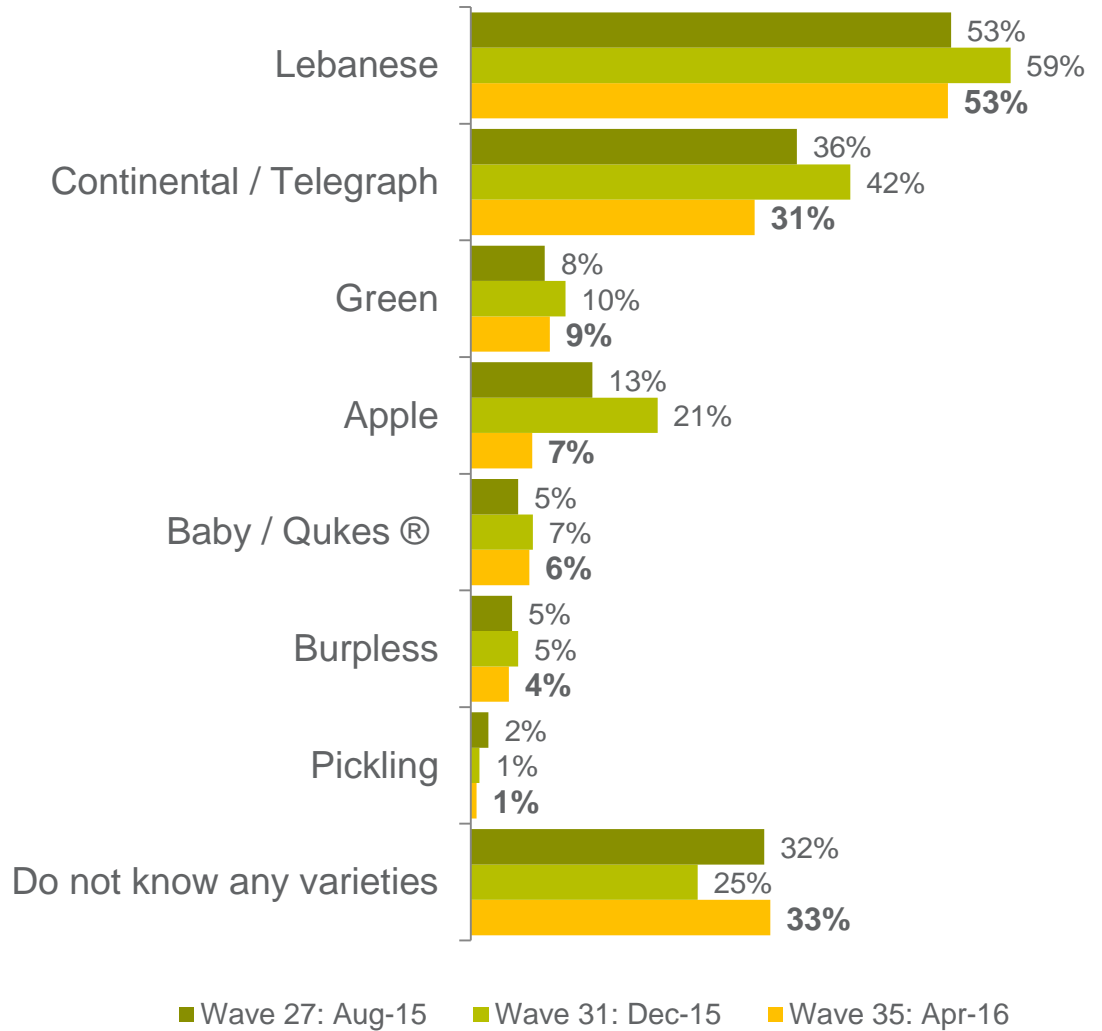


- Average price per kilogram was lower in April at \$4.27 per kg, compared to \$4.56 per kg in December 2015.
- There was promotional pricing in Sydney and Hobart at \$3.50 per kg. The highest price for Lebanese cucumbers was in Perth at \$6.00 per kg.
- The retail price range was \$2.50 per kg.

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



Spontaneous awareness of cucumbers was lower this wave, with a decline in recall for all varieties.



Q6a. What types/varieties of <commodity> are you aware of? (unprompted)  
Sample Wave 27 N=306, Wave 31 N=306, Wave 35 N=310

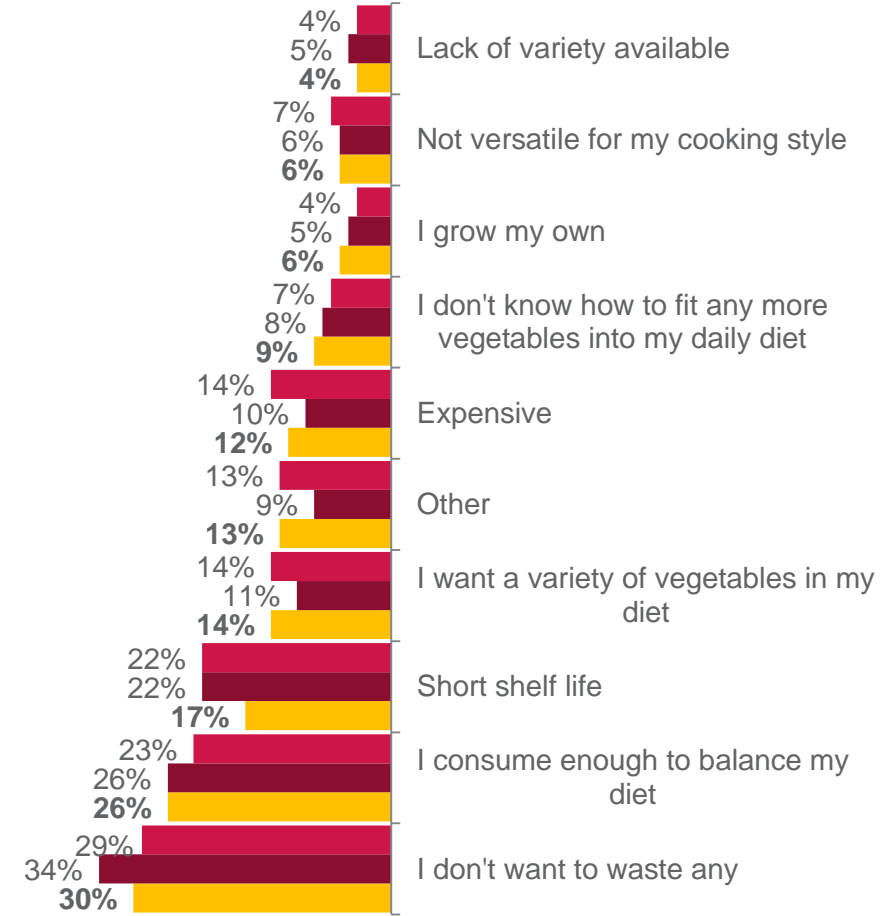
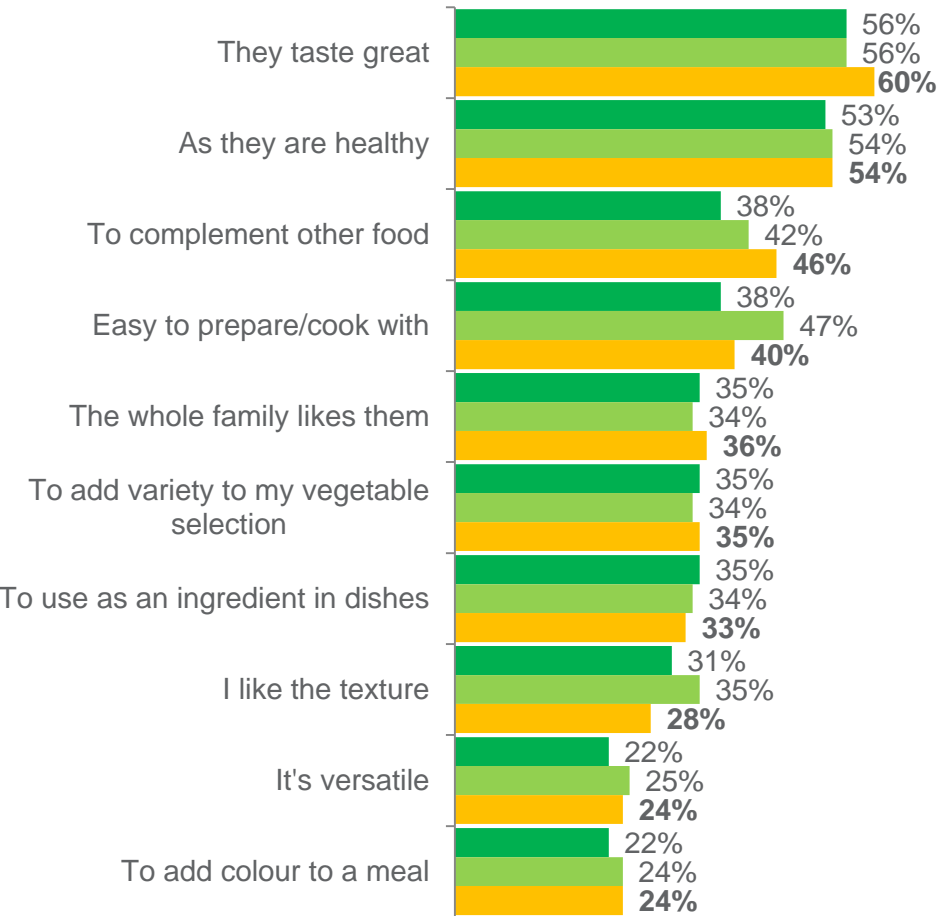


Taste and health remain the key triggers to cucumber purchase. There has been an increase in buying cucumbers to complement other food over past months. Wastage and consuming enough continue to be barriers to future purchase.



### Triggers

### Barriers



■ Wave 27: Aug-15    ■ Wave 31: Dec-15    ■ Wave 35: Apr-16

■ Wave 27: Aug-15    ■ Wave 31: Dec-15    ■ Wave 35: Apr-16

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 27 N=306, Wave 31 N=306, Wave 35 N=310





Dinner and lunch are the main meal occasions for cucumber consumption.

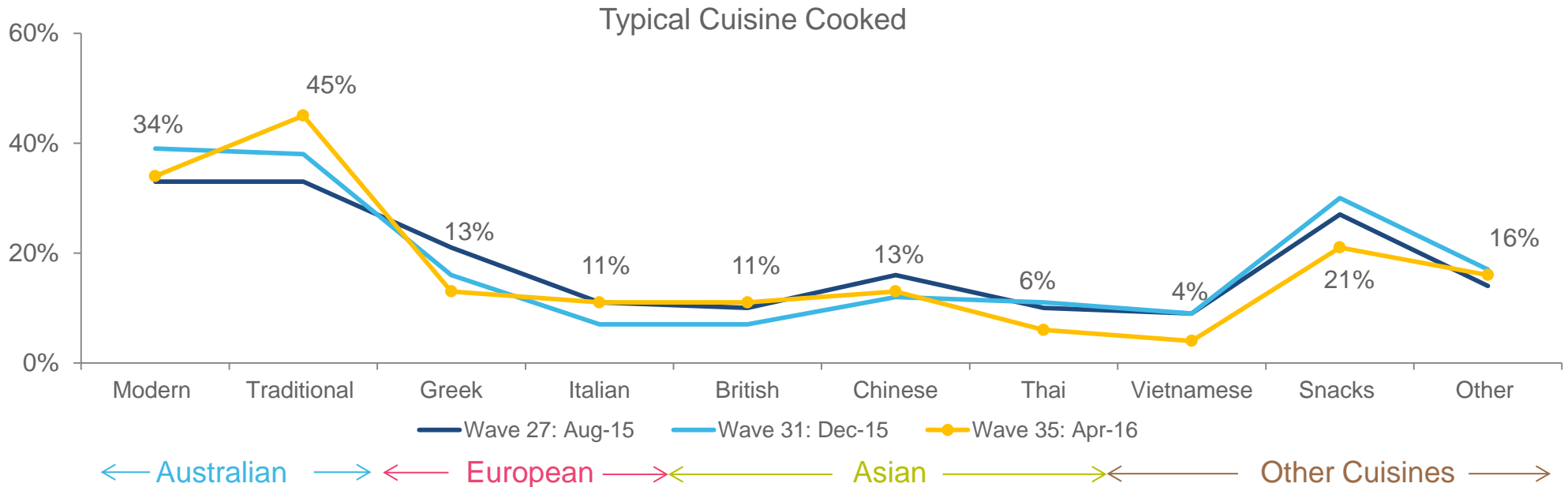
There are limited cuisine styles currently being cooked using cucumber. Australian and snacks are most popular with consumers.

### Top 5 Consumption Occasions

	Wave 31	Wave 35
Dinner	51%	58%
Lunch	56%	57%
Quick Meals	49%	47%
Family meals	43%	46%
Weekday meals	36%	40%

**7%**  
used cucumber when cooking a new recipe

7%, Wave 31



Q10. What cuisines do you cook/consume that use <commodity> ?  
 Q11. Which of the following occasions do you typically consume/use <commodity> ?  
 Sample Wave 27 N=306, Wave 31 N=306, Wave 35 N=310



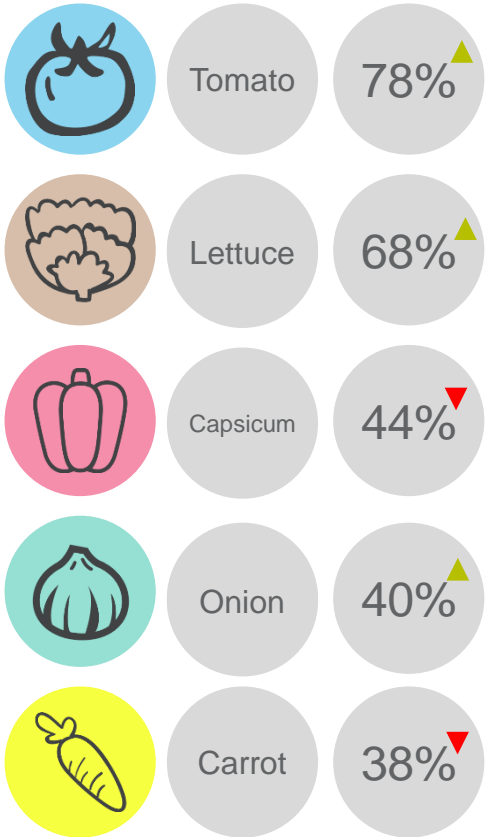
▼ : Indicates LOWER score than current wave.  
 ▲ : Indicates HIGHER score than current wave.



Cucumber is typically served with salad vegetables; including tomatoes, lettuce, capsicums, onions and carrots. The primary consumption style is raw.



Accompanying Vegetables



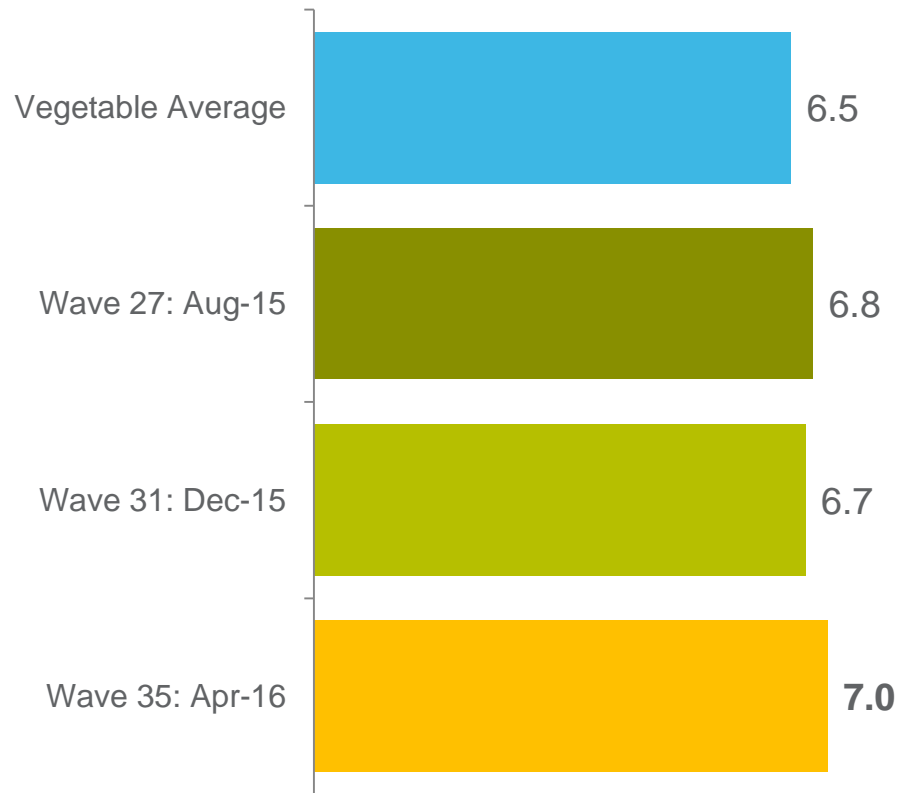
Top Cooking Styles

	Wave 27	Wave 31	Wave 35
Raw	79%	82%	79%
Other	12%	13%	15%
Stir frying	13%	10%	12%
Soup	7%	2%	5%
Roasting	4%	1%	4%
Frying	5%	3%	4%
Grilling	4%	2%	3%
Steaming	5%	2%	3%
Sautéing	4%	2%	3%
Fermenting	3%	1%	3%

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 27 N=306, Wave 31 N=306, Wave 35 N=310



Importance of cucumber provenance has slightly increased this wave, sitting above the Vegetable Average. This indicates that consumers want to know the provenance of cucumbers they purchase and most importantly, that it is grown in Australia.



Q14. When purchasing <commodity>, how important is Provenance to you?  
Q15. And when purchasing Cucumber, how important is that it is grown in Australia?  
Sample Wave 27 N=306, Wave 31 N=306, Wave 35 N=310

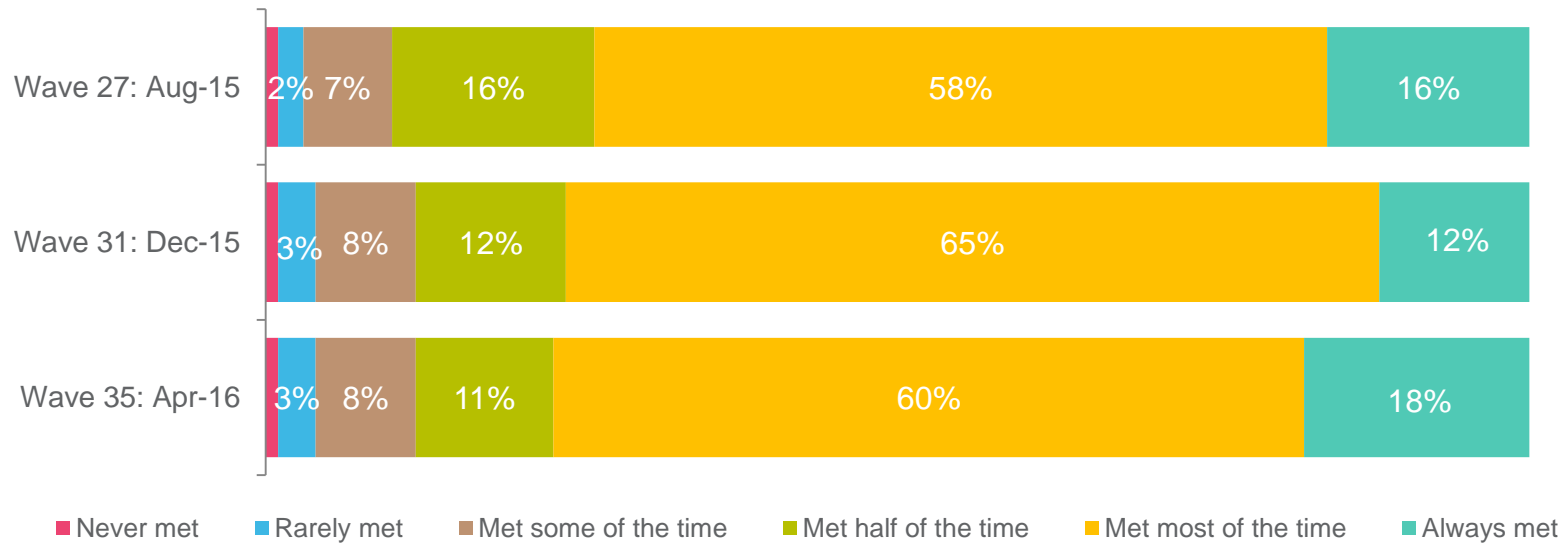


Cucumbers are expected to remain fresh for over a week, which has increased this month. At the same time, the amount of consumers who report their freshness expectations are always met has also increased this wave.

Expected to stay fresh for **8.4 days**

- ▼ 8.1 days, Wave 27
- ▼ 7.3 days, Wave 31

### 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 27 N=306, Wave 31 N=306, Wave 35 N=310



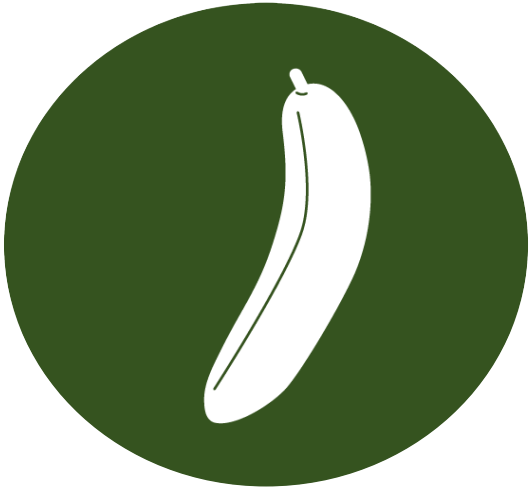
# Trends: Cucumber



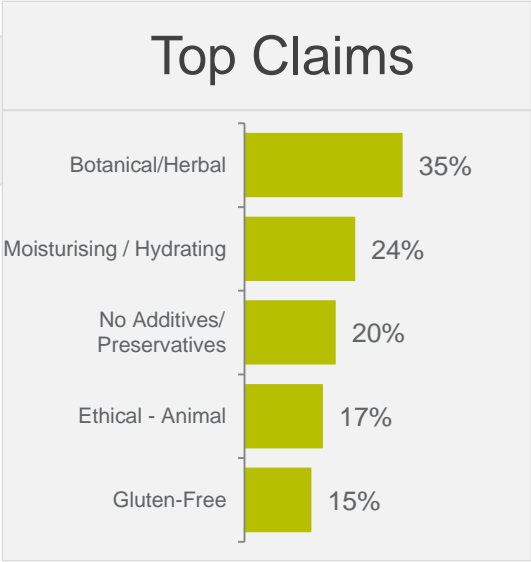
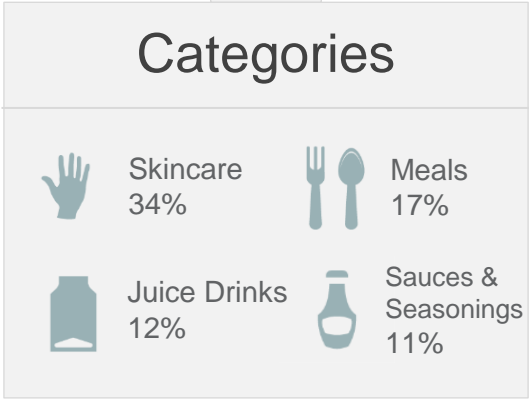
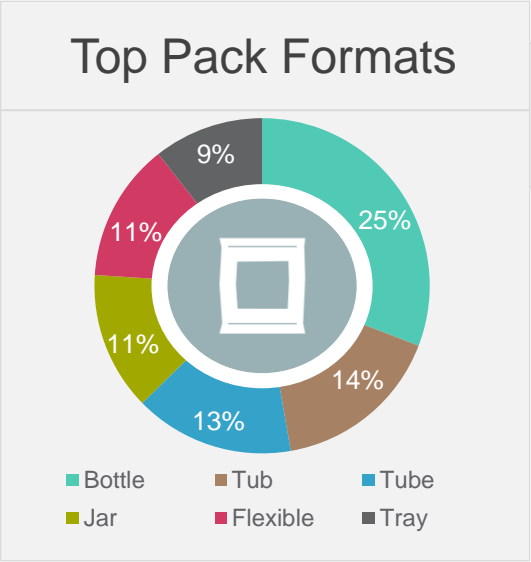
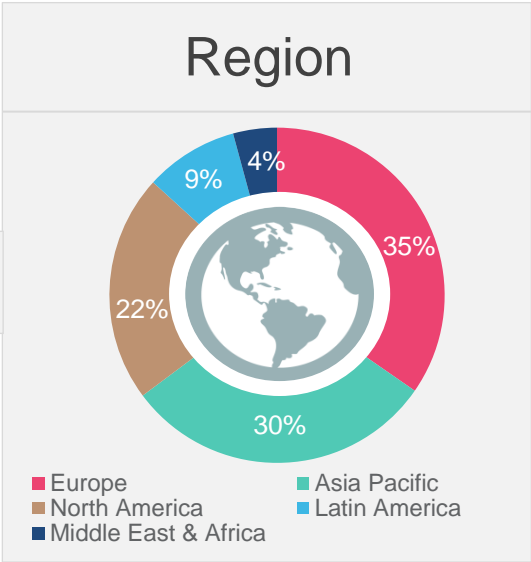
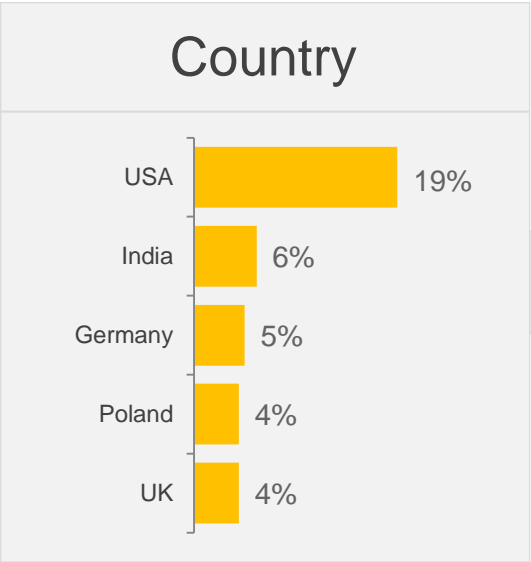
# Cucumber Launches

## December 2015 – April 2016

There were 355 products launched globally in the last three months that contained cucumber as an ingredient. The majority of launches occurred in Europe and Asia Pacific regions. The key categories for launches were skincare, meals, juice drinks and sauces.



355 Global Launches

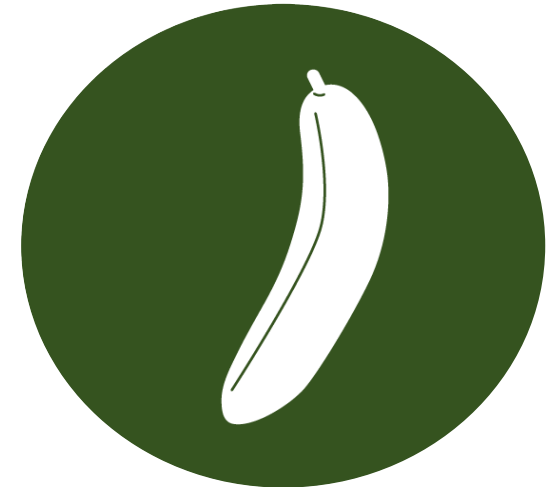






# Cucumber Product Launches: Last 3 Months (December 2015 – April 2016) Summary

- There were 355 cucumber products launched globally, relatively consistent with the previous wave.
- There were 8 products containing cucumber launched in Australia over the last three months. These were primarily salads, juices, and beauty & skincare products.
- Key regions for launch were Europe (35%) and Asia Pacific (30%).
- Bottles (25%), tubs (14%) and tubes (13%) were the most common packaging formats used.
- Top category launches were skincare (34%), meals (17%) and juice drinks (12%).
- The top claims used for products were botanical/herbal (35%), moisturising/hydrating (24%), and no additives/preservatives (20%).
- The most innovative launch was a Watermelon Gazpacho Soup from Spain (examples of these can be found in the following pages).



Source: Mintel (2016)

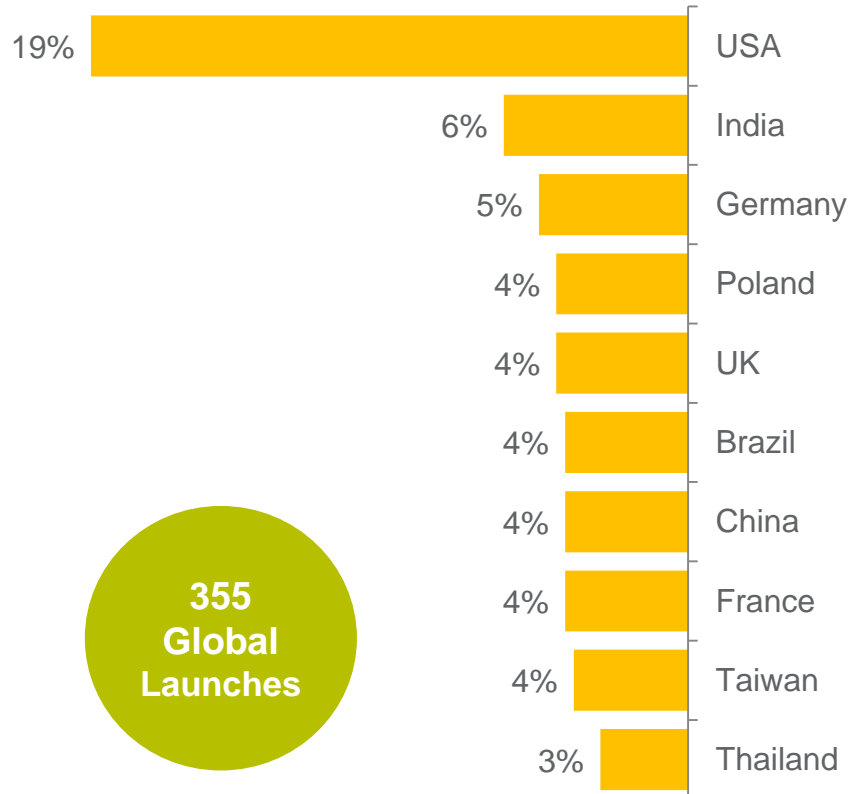




# Cucumber Launches

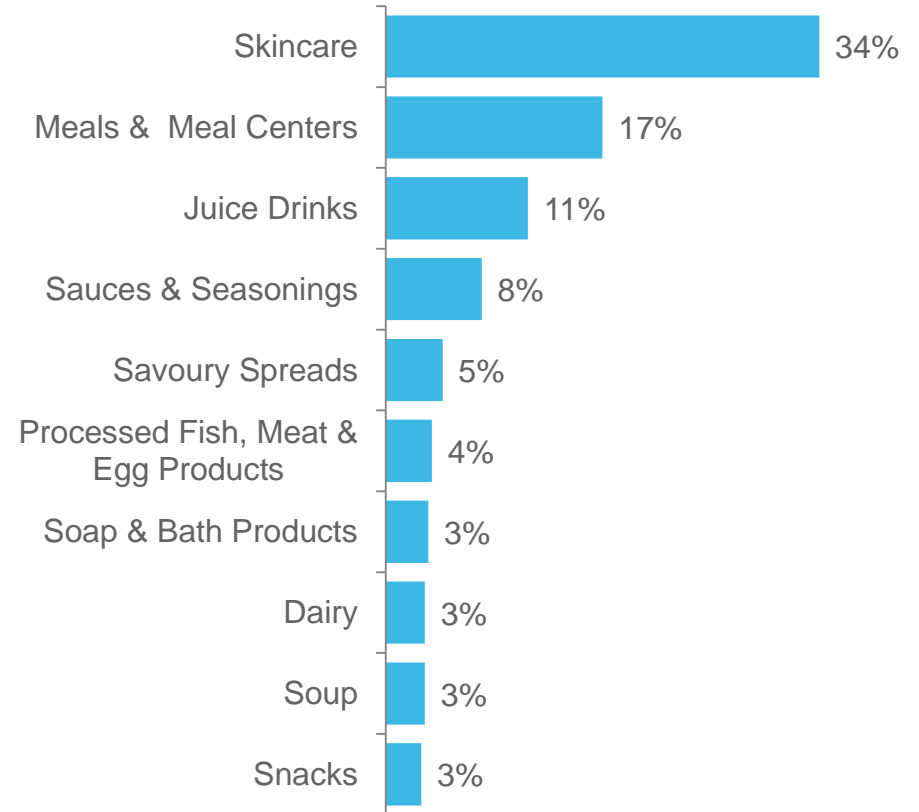
- ➔ USA and India were the main countries of launch for cucumber products.
- ➔ Products were primarily skincare, meals, juice drinks and sauces.

## Top Launch Countries



355  
Global  
Launches










## Top Launch Categories














The main claims used on products were botanical/herbal and moisturising/hydrating. Bottles and tubs were typical packaging formats used, consistent with previous waves.

### Pack Formats Used

Global		Bottle	25%
		Tub	14%
		Tube	13%
Europe		Tub	28%
		Bottle	19%
		Tray	15%
Asia Pacific		Bottle	25%
		Tube	20%
		Jar	12%

### Top Claims Used

Global		Botanical/Herbal	35%
		Moisturising / Hydrating	24%
		No Additives/Preservatives	20%
Europe		No Additives/Preservatives	18%
		Botanical/Herbal	18%
		Vegetarian	16%
Asia Pacific		Botanical/Herbal	50%
		Moisturising / Hydrating	37%
		Ethical - Animal	21%

# ➤➤➤ Innovative Cucumber Launches: L3M (December 2015 – April 2016)

## Bo De Debò Watermelon Gazpacho Soup (Spain)

Bo De Debò Gazpacho Sandía (Watermelon Gazpacho Soup) has been repackaged with an updated design. This soup has been made with fresh ingredients, and retails in a 0.5L pack.



**Claims:**  
N/A

## Estrella Tzatziki Chips (Finland)

Estrella Luonnollisen Hyviä Perunalastuja (Tzatziki Chips) have been added to the range. They are described as one of the flavours of summer, with a fresh taste of yogurt, grated cucumber and pressed garlic. These thin and crispy crisps are made from high quality potatoes, beneficial sunflower and rapeseed oils that have the same good fat composition as olive oil, and fine spices. This product retails in a 275g pack featuring the manufacturer's Facebook link.



**Claims:**  
Seasonal, Social Media

## Naked Pressed Cool Pineapple (USA)

Naked Pressed Cool Pineapple is cold-pressed 90% juice made with pineapple, cucumber, filtered water and lemon, and is said to be crisp, clean and bright. It is suitable for vegans, and is free from added sugar, preservatives, gluten and GMO. This kosher certified product contains 140 calories per bottle, and retails in a recyclable 12-fl. oz. pack.



**Claims:**  
No Additives/Preservatives, Kosher, Low/No/Reduced Sugar, Gluten-Free, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Package, Vegan, No Animal Ingredients, GMO-Free

## Bicentury Xperience Corn Cakes with Cucumber, Yogurt, Lemon and Mint Flavour (Spain)

Bicentury Xperience Tortitas de Maíz Sabor Pepino, Yogur, Limón y Menta (Corn Cakes with Yogurt, Cucumber, Lemon and Mint) are now available. The product contains no colourants or preservatives and retails in a 123.5g pack.



**Claims:**  
No Additives/Preservatives

# »»» Innovative Cucumber Launches: L3M (December 2015 – April 2016)

## Hidden Valley Greek Yogurt Dressing with Cucumber Dill (USA)

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



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

## Ziaja Cucumber Face Cream (Ukraine)

Ziaja Cucumber Krem dlya Oblychchya Ohirkovyy (Face Cream) features an anti-imperfection formula designed for oily and combination skin. The product is made with the key ingredients of cucumber pulp extract, provitamin B5 and vitamins A and E, and claimed to do the following: provide intensive hydration, and soothe skin irritation; work to stabilise the function of sebaceous glands; provide smoothing and nourishing effects; optically lighten the complexion and improve its tone.



**Claims:**  
Vitamin/Mineral Fortified, Botanical/Herbal, pH Neutral, Whitening, Dermatologically Tested, Mattifying\*, Moisturising / Hydrating, Allergy Tested

## Easy Life Seeds of Life (India)

Easy Life Seeds of Life are packed with protein, healthy fats, vitamins, minerals and fibre. According to the manufacturer, the seeds help to enhance the immune system, improve cardiovascular health, and help reduce signs of ageing. With their low glycemic profile and excellent nutrient profile, they are said to be great as a part of a weight control program.



**Claims:**  
Vegetarian, Low/No/Reduced Glycemic, Anti-Ageing, Cardiovascular (Functional), Beauty Benefits, Immune System (Functional), Slimming

## Up & Up Oil-Free Eye Makeup Remover (USA)

Up & Up Oil-Free Eye Makeup Remover is said to gently and effectively remove even waterproof mascara without stretching and pulling skin. The product contains aloe and cucumber extracts, claimed to help soothe skin, leaving it fresh, clean and with no oily residue. It retails in a 5.5-fl. oz. recyclable pack.



**Claims:**  
Botanical/Herbal, Ethical - Environmentally Friendly Package, Oil Free\*, Cleansing\*

# ➤➤➤ Innovative Cucumber Launches: L3M (December 2015 – April 2016)

## Plenish Boost Organic Cold Pressed Raw Juice (UK)

Plenish Boost Organic Cold Pressed Raw Juice has been repackaged and retails in a recyclable 250ml bottle featuring the EU Green Leaf, Organic Soil Association, Twitter, Facebook, Instagram, and Pinterest logos. This juice contains spinach, kale, parsley, romaine, cucumber, pear, lemon and ginger. It is a source of manganese, which protects cells from oxidative stress, and folic acid, which supports psychological performance.



**Claims:**  
No Additives/Preservatives, Low/No/Reduced Sugar, Organic, Antioxidant, Brain & Nervous System (Functional), Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Social Media

## Lafine Vegetable Foam Cleansing (Hong Kong)

Lafine Vegetable Foam Cleansing is a cleansing foam containing hydrating extracts from cucumber, carrot, water parsley, tomato and parsley, as well as red and green granules to supply nutrients to the skin. It also contains papaya extract to gently exfoliate the skin to help keep skin clean and smooth. According to the manufacturer, its fine foam has a fragrance 'as sweet as a vegetable', while helping to wash off make-up residues and waste on the surface of the skin.



**Claims:**  
Botanical/Herbal, Exfoliating, Moisturising / Hydrating, Paraben Free, Cleansing\*

## Sand Farm Finland Cream Cheese Sandwich (South Korea)

Sand Farm Finland Cream Cheese Sandwich comprises a Finish style sandwich which is made with Finish rye bread and cream cheese. This product can be enjoyed cold and retails in a 140g pack bearing the HACCP logo.



**Claims:**  
Microwaveable

## Merl Valess Greek Style Salad with Pasta (Germany)

Merl Valess Salat Griechischer Art mit Nudeln (Greek Style Salad with Pasta) contains Valess' meat free roast sausage slices, pasta, soft cheese, olives and cucumber. The product is free from preservatives, suitable for on-the-go and retails in a 180g pack which includes a fork and features the European Vegetarian Union and Facebook logos.



**Claims:**  
No Additives/Preservatives, Vegetarian, On-the-Go, Social Media





# Australian Cucumber Launches: L3M (December 2015 – April 2016)

## Fuss Free Naturals Natural Facial Cleansing Wipes Aloe Vera + Cucumber

Fuss Free Naturals Natural Facial Cleansing Wipes Aloe Vera + Cucumber are enriched with aloe vera and vitamin B5 to moisturise and cleanse the skin leaving it feeling moisturised. It is also said to remove waterproof mascara and make-up. Suitable for all skin types. The is non greasy and non drying product is free from parabens and sulphates and retails in an 8 mini wipes resealable pack and a 25 wipe pack.



**Claims:**  
Vitamin/Mineral Fortified, Botanical/Herbal, Moisturising / Hydrating, Paraben Free, Cleansing\*, Convenient Packaging, Sulphate/Sulfate Free

## Black Swan Classic Favourite Dips

Black Swan Classic Favourite Dips have been relaunched with a new brand and contains French onion dip, tzatziki, hummus and guacamole. The product retails in a newly designed 400g pack containing four 100g dips.



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

## The Juice Lab Gimme Green Premium Pressed Juice

The Juice Lab Gimme Green Premium Pressed Juice is made with Goulburn Valley pear, pink lady apple, banana, cucumber, spinach, kale, lemon, chlorophyll and cayenne pepper. This juice features five star Health Star Rating and is free from added sugar, fruit concentrates, artificial colours, artificial flavours and preservatives. The product retails in a 400ml bottle featuring a Twitter hash tag.



**Claims:**  
No Additives/Preservatives, Low/No/Reduced Sugar, Premium, Social Media

## Sushi Master Tofu Traditional Vietnamese Rice Paper Roll

Sushi Master Tofu Traditional Vietnamese Rice Paper Roll is now available. The product is retailed in a three unit pack containing a gluten-free sweet chili sauce sachet.



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

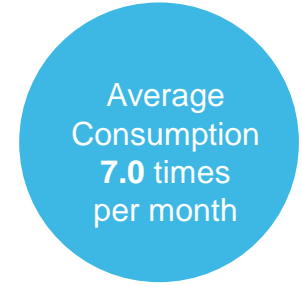
A close-up photograph of several green zucchinis with characteristic light-colored speckles. A large, dark grey circle is superimposed over the center of the image, containing the text 'Zucchini.' in white.

# Zucchini.



Both purchase and consumption frequency of zucchini is lower this wave.

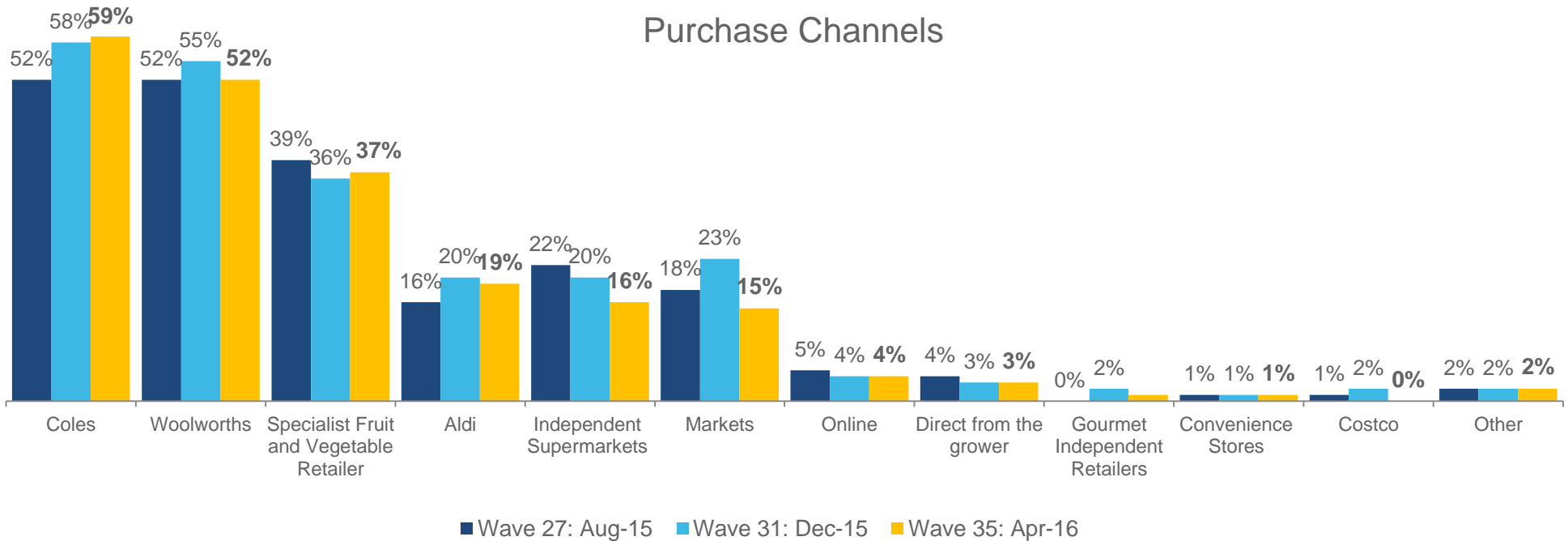
Purchase from Coles has consistently increased across waves, being the key retail channel. In contrast, purchase from independent supermarkets has declined over the last three waves.



▲ 3.6 times, Wave 27  
▲ 4.2 times, Wave 31

▲ 8.2 times, Wave 27  
▲ 7.8 times, Wave 31

### 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 27 N=303, Wave 31 N=304, Wave 35 N=308



# Average Spend and Price Sensitivity



Average weight of purchase

The average consumer typically purchases **700g** of zucchini per shop. Purchase weight remains stable across months.

- 700g, Wave 27
- 700g, Wave 31



Recalled last spend

The average recalled last spend is **\$2.90**, which is slightly below past waves.

- ▲ \$3.00, Wave 27
- ▲ \$3.10, Wave 31



Value for money

On average, consumers perceive zucchini to be good value for money (**6.6/10**), which has noticeably increased this wave.

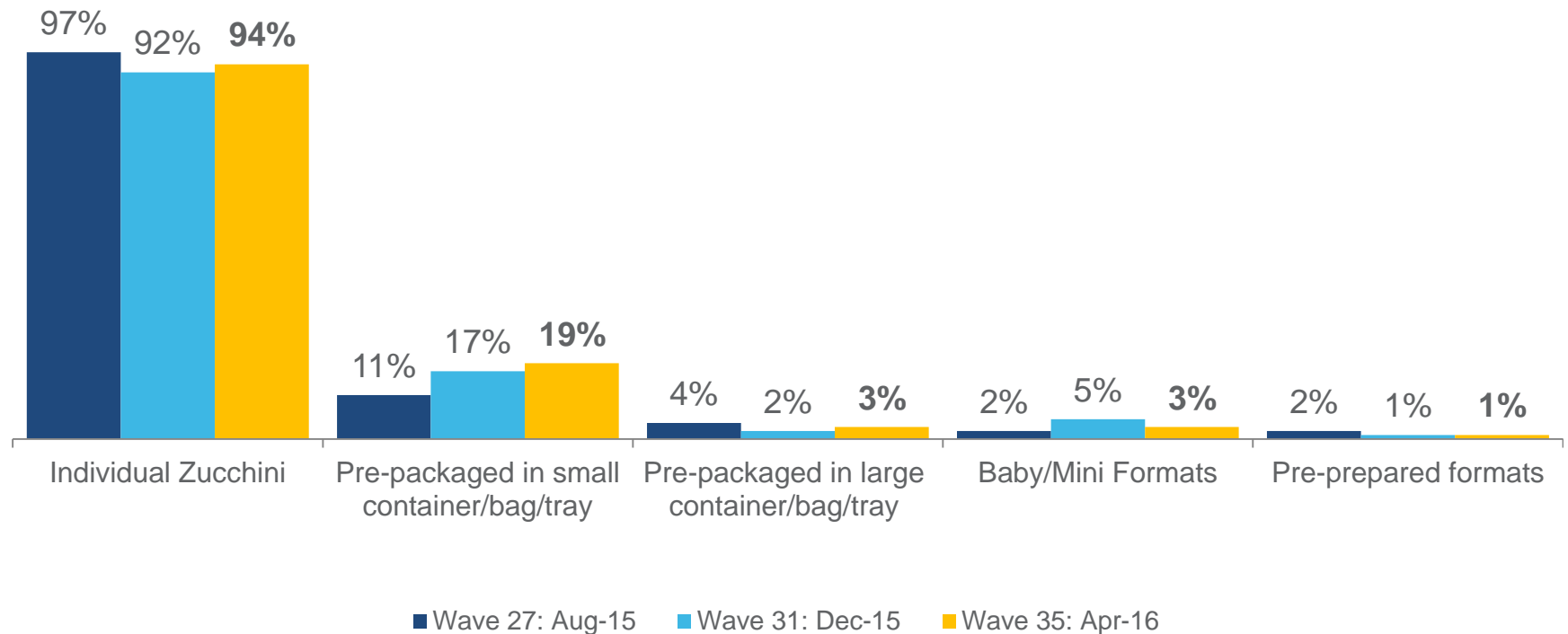
- ▼ 6.4/10, Wave 27
- ▼ 6.1/10, Wave 31

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 27 N=303, Wave 31 N=304, Wave 35 N=308





Individual zucchini remains the main purchase format. However, there has been an increase in small pre-packaged formats over the last three waves.

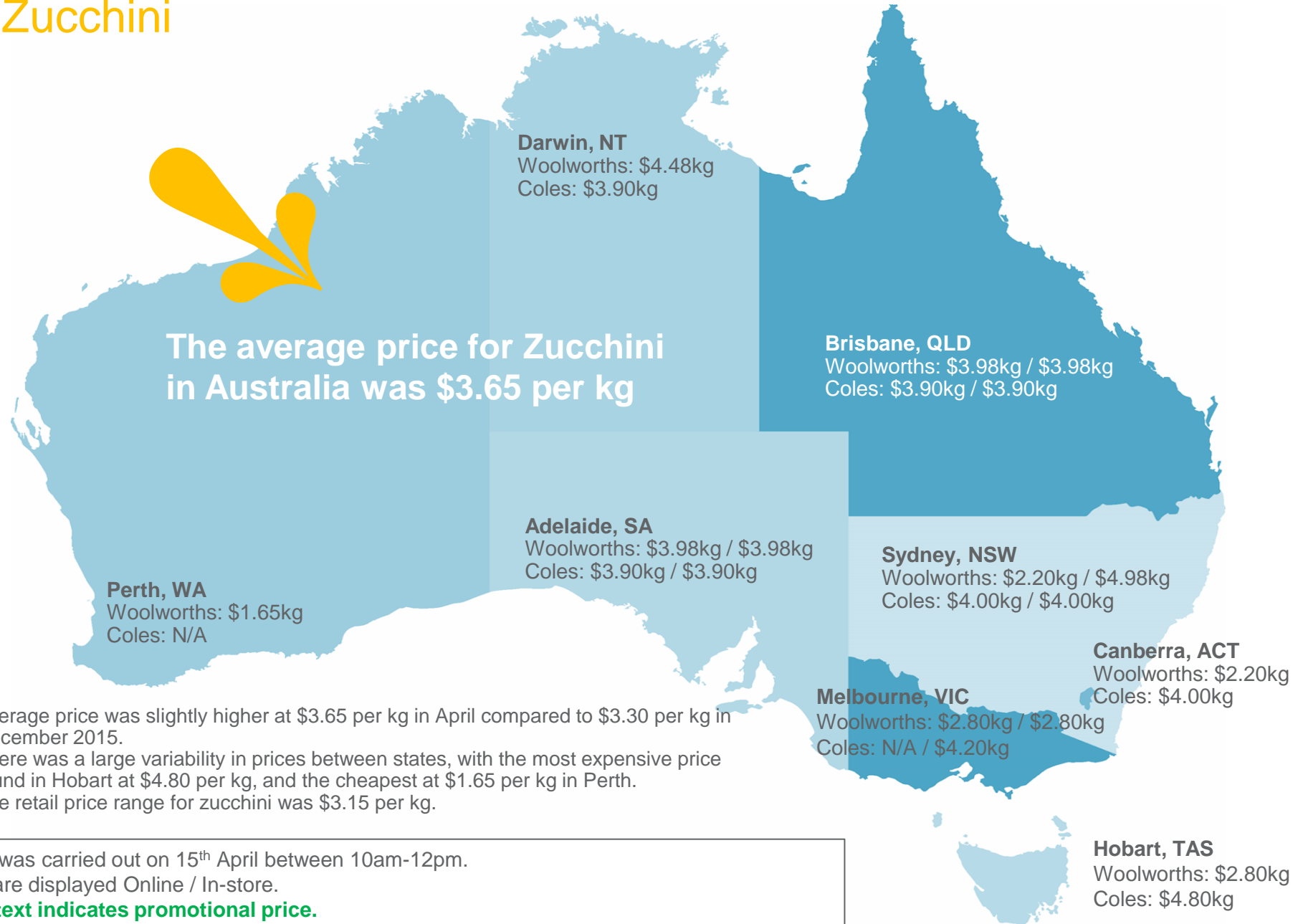


Q4b In what fresh formats do you typically purchase Zucchini?  
Sample Wave 27 N=303, Wave 31 N=304, Wave 35 N=308

# Online and In-store Commodity Prices



## Zucchini



- Average price was slightly higher at \$3.65 per kg in April compared to \$3.30 per kg in December 2015.
- There was a large variability in prices between states, with the most expensive price found in Hobart at \$4.80 per kg, and the cheapest at \$1.65 per kg in Perth.
- The retail price range for zucchini was \$3.15 per kg.

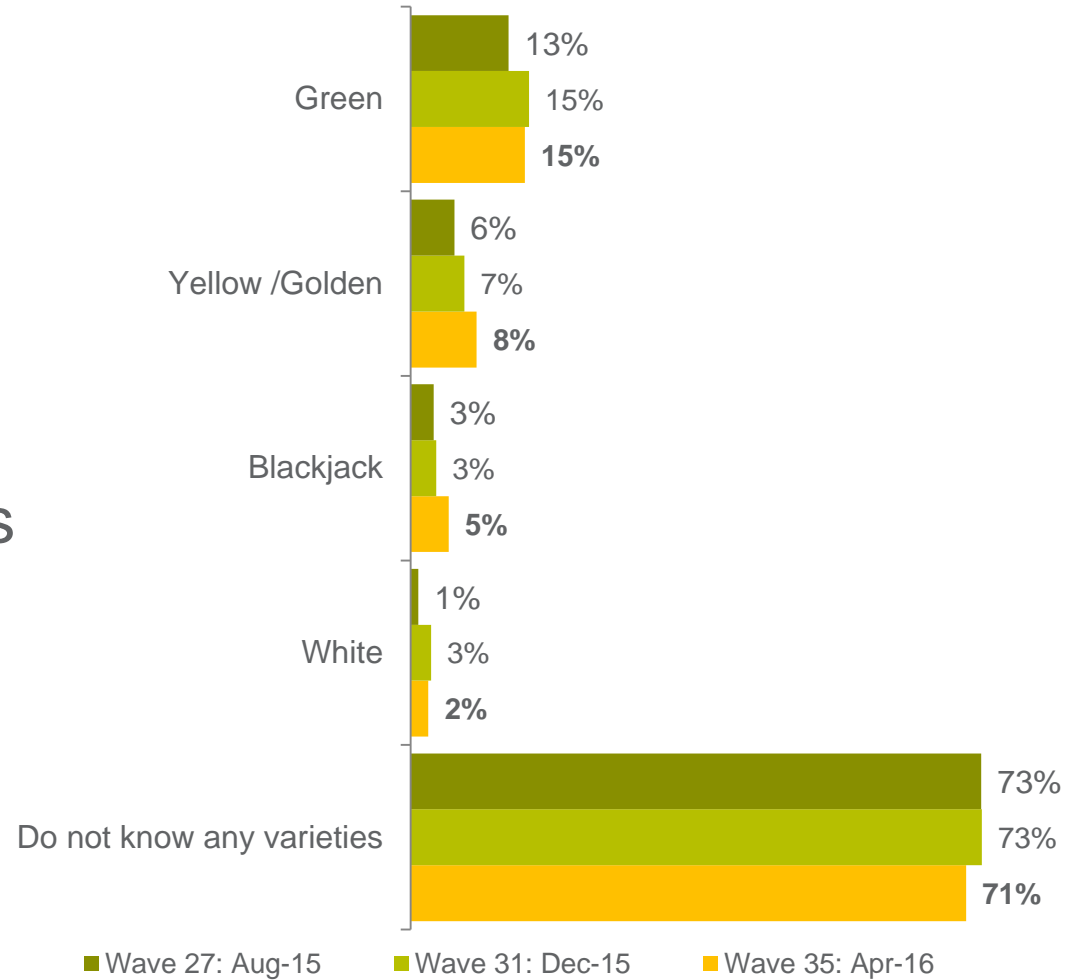
Pricing was carried out on 15<sup>th</sup> April between 10am-12pm.  
Prices are displayed Online / In-store.  
**Green text indicates promotional price.**





Overall, awareness of zucchini varieties remains very low.

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

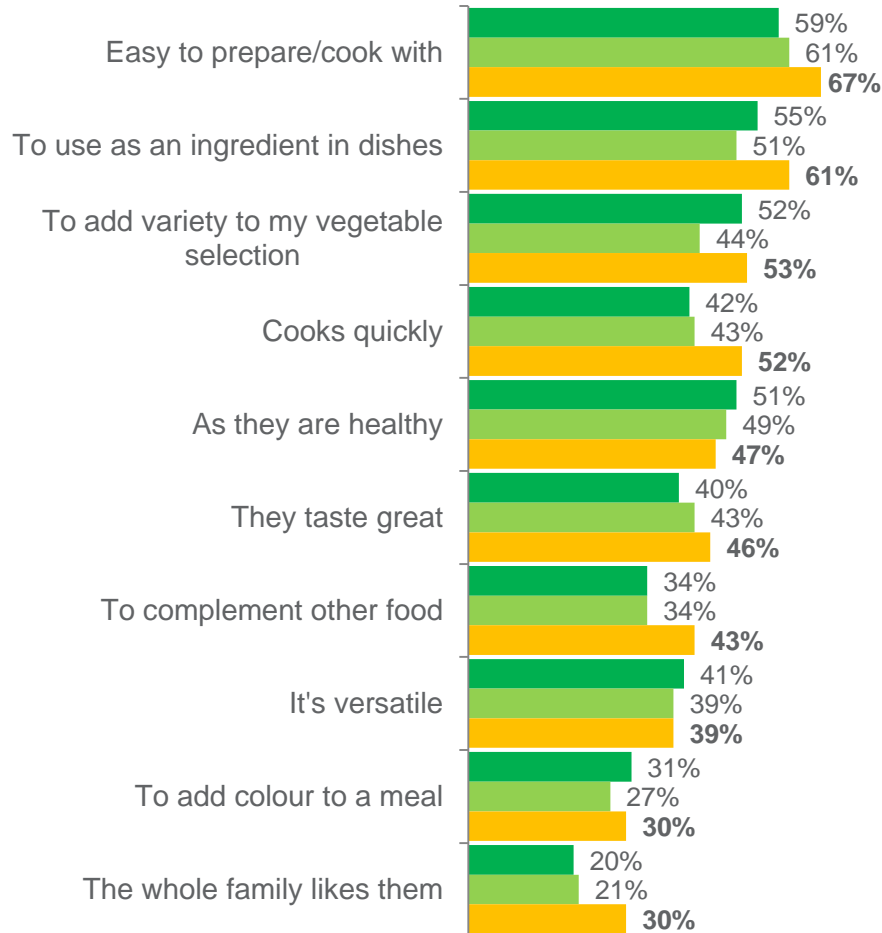




Ease of preparation and use as an ingredient are the primary reasons for purchase. In contrast, consuming enough for needs and not wanting to waste any are the main barriers to future purchase.

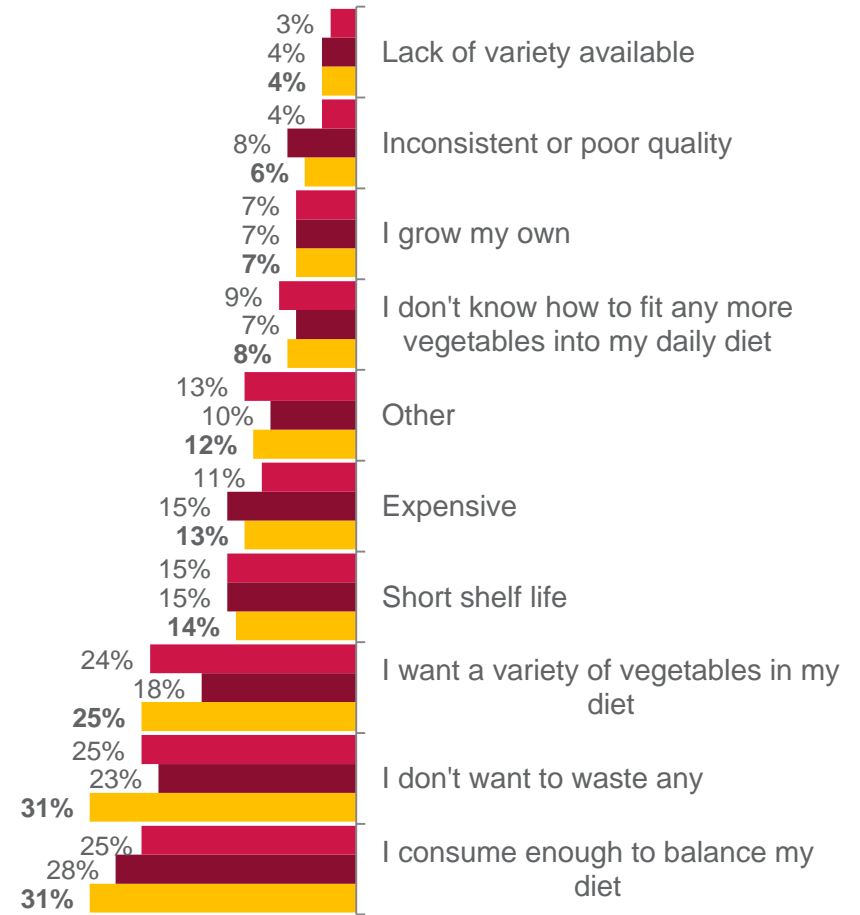


### Triggers



■ Wave 27: Aug-15   ■ Wave 31: Dec-15   ■ Wave 35: Apr-16

### Barriers



■ Wave 27: Aug-15   ■ Wave 31: Dec-15   ■ Wave 35: Apr-16

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 27 N=303, Wave 31 N=304, Wave 35 N=308



Zucchini is generally eaten at dinner.

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

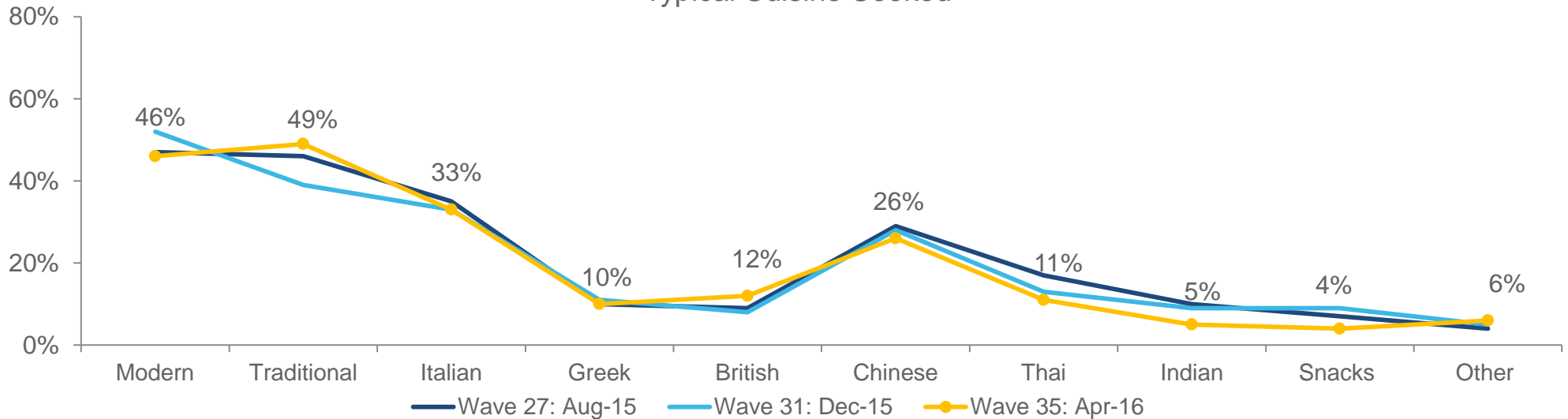
### Top 5 Consumption Occasions

	Wave 31	Wave 35
Dinner	67%	76%
Family Meals	59%	63%
Weekday Meals	41%	51%
Quick Meals	43%	43%
Weekend Meals	28%	43%

**14%**  
used zucchini when cooking a new recipe

▲ 17%, Wave 31

### Typical Cuisine Cooked



← Australian → ← European → ← Asian → Other Cuisines

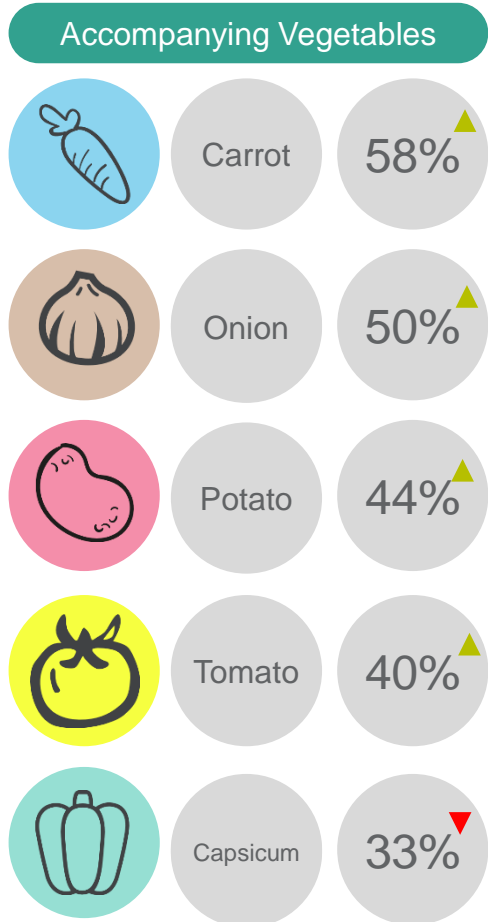


▼ : Indicates LOWER score than current wave.  
▲ : Indicates HIGHER score than current wave.

Q10. What cuisines do you cook/consume that use <commodity>?  
Q11. Which of the following occasions do you typically consume/use <commodity>?  
Sample Wave 27 N=303, Wave 31 N=304, Wave 35 N=308



Zucchini is cooked in multiple ways, including stir-frying, steaming, frying and in soups. Carrot, onion and potato are served with zucchini, consistent with the previous wave.



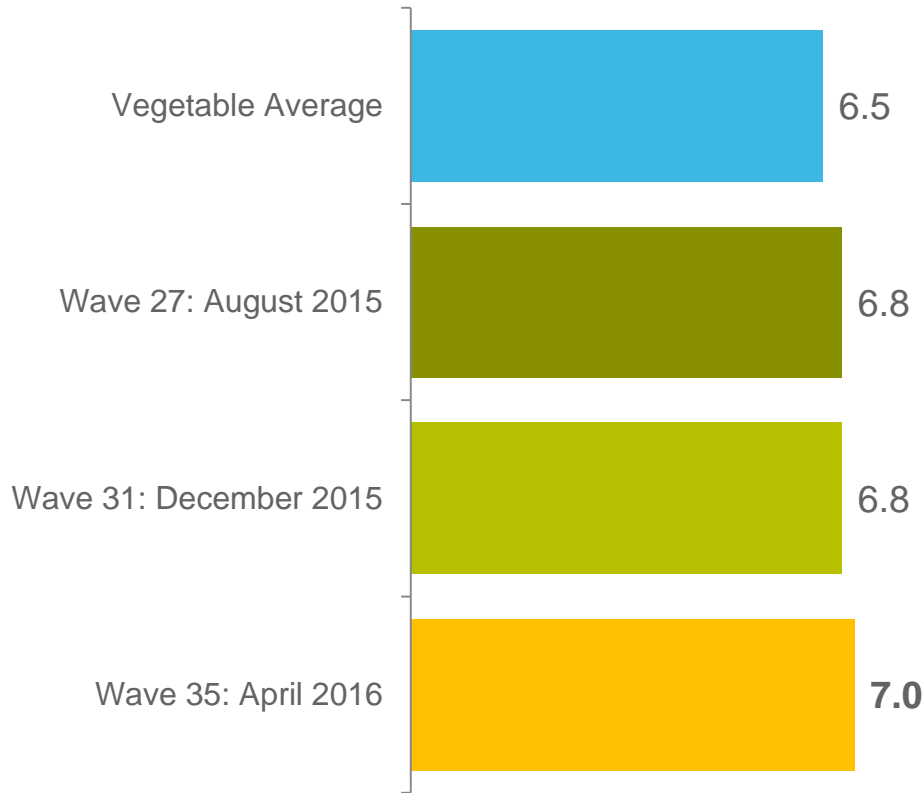
### Top Cooking Styles

	Wave 27	Wave 31	Wave 35
Stir frying	53%	47%	<b>54%</b>
Steaming	40%	36%	<b>39%</b>
Frying	19%	24%	<b>27%</b>
Soup	30%	19%	<b>27%</b>
Sautéing	25%	26%	<b>27%</b>
Baking	27%	25%	<b>25%</b>
Roasting	27%	28%	<b>24%</b>
Grilling	17%	18%	<b>21%</b>
Boiling	17%	15%	<b>20%</b>
Slow Cooking	12%	12%	<b>18%</b>

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 27 N=303, Wave 31 N=304, Wave 35 N=308



Importance of provenance has slightly increased this wave and sits above the Vegetable Average. This indicates that consumers want to know the provenance of zucchinis they purchase and most importantly, that it is grown in Australia.



Q14. When purchasing Zucchini, how important is Provenance to you?  
Q15. And when purchasing Zucchini, how important is that it is grown in Australia?  
Sample Wave 27 N=303, Wave 31 N=304, Wave 35 N=308

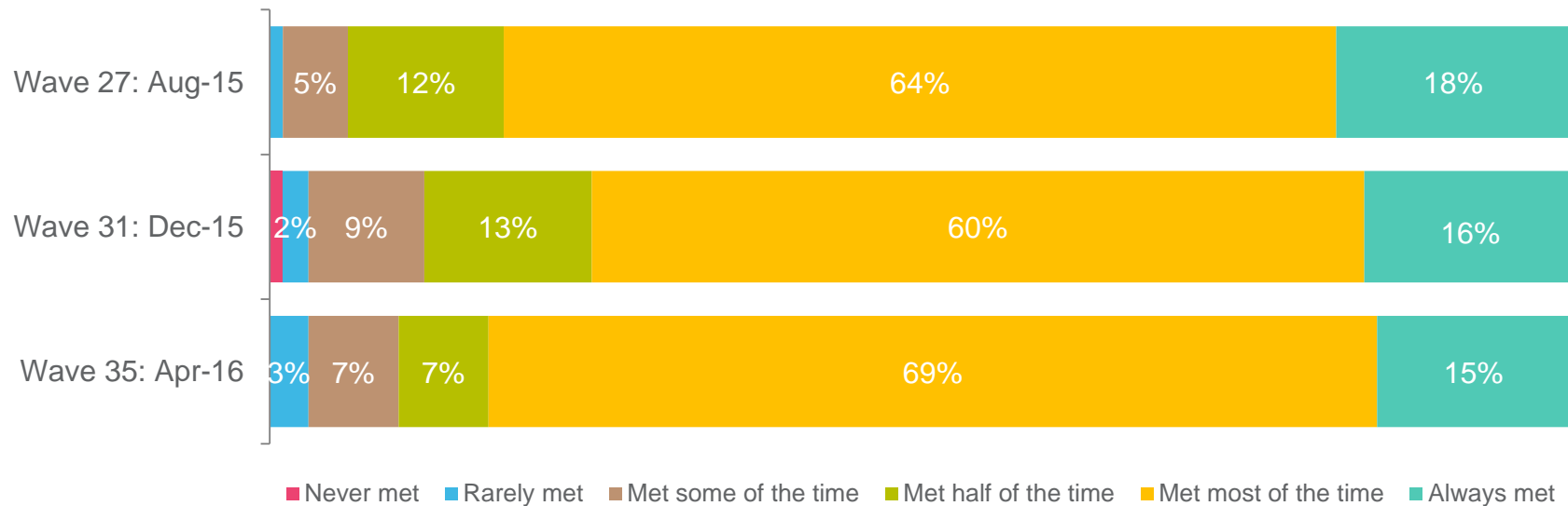


Zucchinis are expected to stay fresh for just over a week once purchased. There has been a noticeable increase in expectations of zucchini being met most of the time in comparison to the previous wave.

Expected to stay fresh for 7.9 days

- ▲ 8.2 days, Wave 27
- ▼ 7.7 days, Wave 31

### 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 27 N=303, Wave 31 N=304, Wave 35 N=308





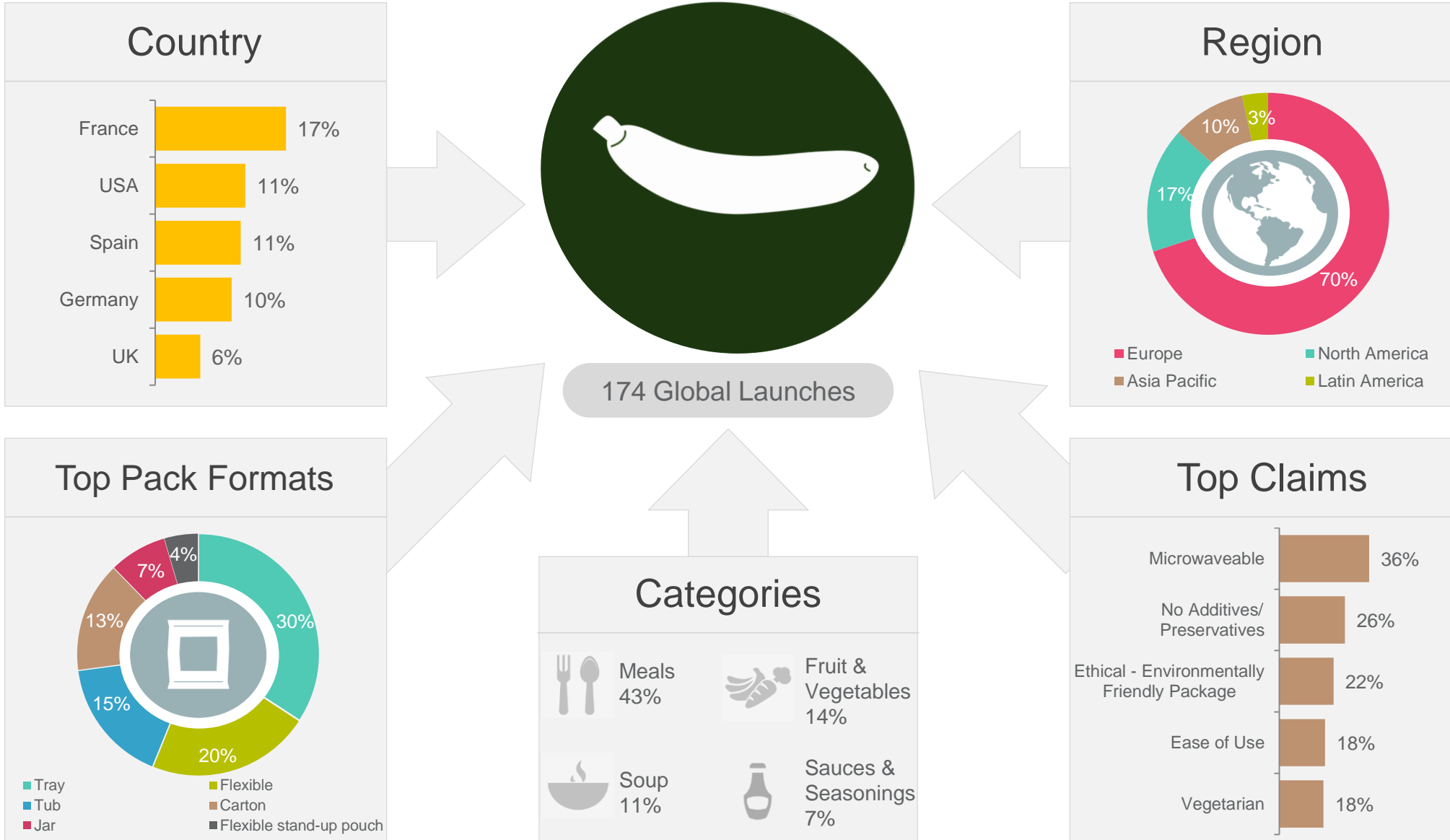
# Trends: Zucchini



# Zucchini Global Launches

December 2015 – April 2016

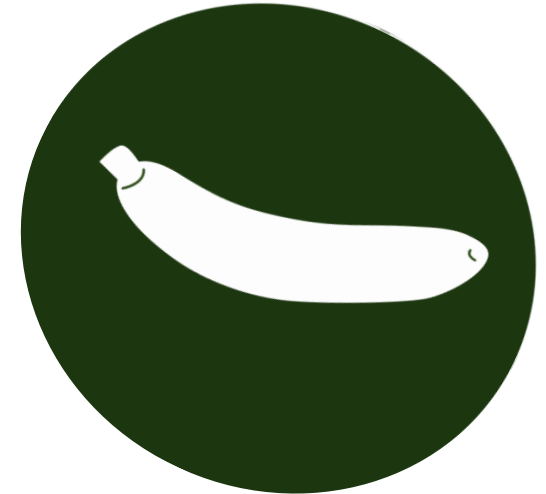
There were 174 zucchini products launched in the last three months. The majority of launches occurred in Europe. The key countries for launch included France, USA and Spain. Categories for launches included meals, fruit & vegetables and soups.





# Zucchini Product Launches: Last 3 Months (December 2015 – April 2016) Summary

- There were 174 products launched globally in the last three months. This was slightly higher than previous waves.
- Domestically, there were five products launched that contained zucchini as an ingredient.
- Launches predominantly occurred in Europe (70%), followed by North America (17%).
- The most common packaging used for launches were tray (30%) and flexible (20%) formats.
- Meals (43%), fruit & vegetables (14%) and soups (11%) were the main categories for launches.
- Microwavable (36%) remained the most common claim used for products. No additives/preservatives (26%) was also frequently used.
- The most innovative launch this wave was Veggie Style Vegetarian Pasta Pockets from Germany (other examples can be found in the following pages).

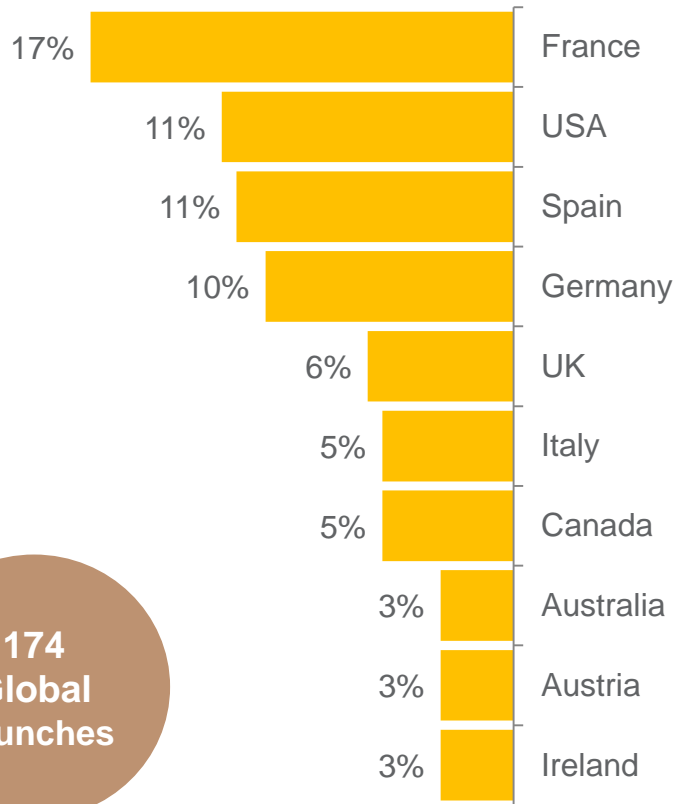




# Zucchini Launches

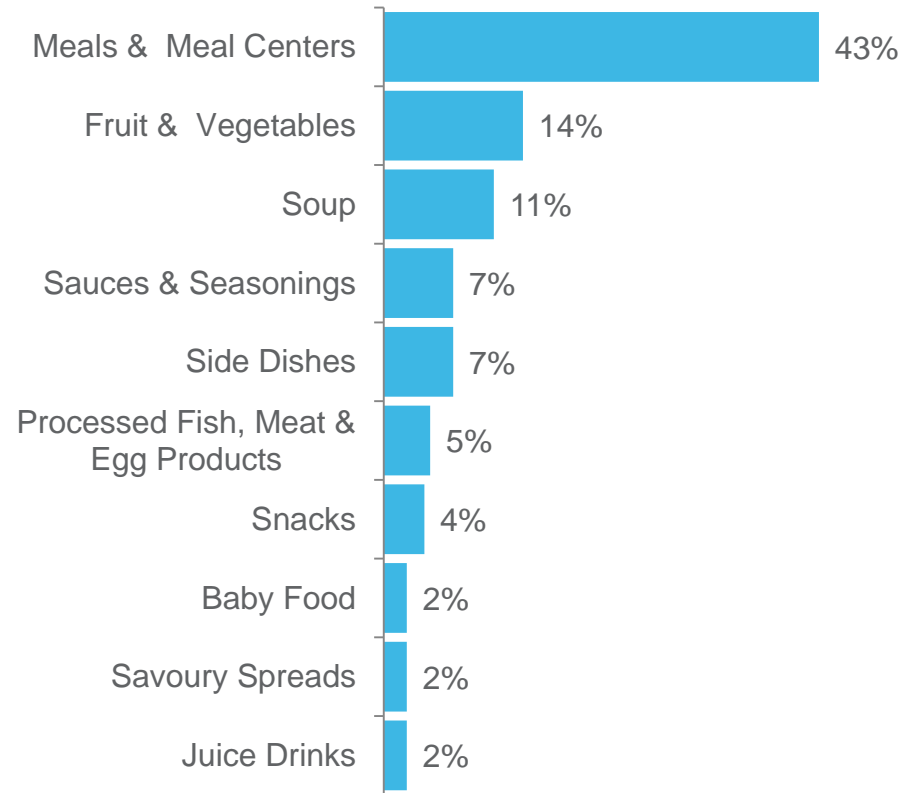
- > France was the key country for launches over the last three months, consistent with previous waves.
- > Top categories for products were meals, fruit & vegetables and sauces & seasonings.

### Top Launch Countries



174  
Global  
Launches







### Top Launch Categories





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

### Pack Formats Used

Global		Tray	30%
		Flexible	20%
		Tub	15%
Europe		Tray	32%
		Flexible	23%
		Carton	12%

### Top Claims Used

Global		Microwaveable	36%
		No Additives/Preservatives	26%
		Ethical - Environmentally Friendly Package	22%
Europe		Microwaveable	31%
		No Additives/Preservatives	22%
		Vegetarian	21%

# »»» Innovative Zucchini Launches: L3M (December 2015 – April 2016)

## Innocent Apples, Pears, Spinach, Kale & Baobab Juice (UK)

Innocent Apples, Pears, Spinach, Kale & Baobab Juice is made of pure fruit and vegetables juices, whole crushed fruit, baobab, safflower and spirulina extract. Each serving provides two of the five recommended portions of fruit a day. This sustainable and gently pasteurised beverage is a source of vitamin C, which helps the immune system. This product retails in a 750ml pack that is FSC certified and bears Facebook and Twitter links.



**Claims:**  
Immune System (Functional), Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Ethical - Charity, Social Media

## Boots Toddler Organic Mediterranean Vegetable Risotto (UK)

Boots Toddler Organic Mediterranean Vegetable Risotto is suitable for toddlers from 12 months of age. This vegetarian meal comprises pieces of vegetables and rice in a tomato and herb sauce; and contains no added flavours, colours, preservatives and salt. According to the manufacturer, this perfectly balanced nutritious meal is made with organic ingredients selected from fully-certified suppliers, and has delicate flavours to nurture baby's palate.



**Claims:**  
No Additives/Preservatives, Microwaveable, Organic, Low/No/Reduced Sodium, Vegetarian, Babies & Toddlers (0-4), Ethical - Environmentally Friendly Package

## Replai All Natural Veggie Chips (Indonesia)

Replai Keripik Sayuran (All Natural Veggie Chips) are now available. This organic product is free from GMO ingredients, MSG, harmful pesticides, cholesterol, gluten, artificial colours, artificial flavours, and preservatives. This product is slow-fried with healthy virgin coconut oil to retain nutrients, and is described as delicious, yet healthy and crunchy but not hard. It contains natural mushroom extract seasoning, and retails in a 90g pack.



**Claims:**  
No Additives/Preservatives, All Natural Product, Low/No/Reduced Cholesterol, Organic, Gluten-Free, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Product, GMO-Free

## Orogel il Benessere Mini Burger with Quinoa and Flaxseed (Italy)

Orogel il Benessere Mini Burgher Benessere con Quinoa e Semi di Lino (Mini Burger with Quinoa and Flaxseed) is now available. The vegetarian product is a natural source of fibres, and is free from gluten. It is rich in omega 3 alpha-linoleic acid which contributes to maintain the normal level of cholesterol, can be prepared in a pan or oven, and is ideal for a balanced diet. It retails in a 240g pack containing six units, and featuring a QR code.



**Claims:**  
Vegetarian, Gluten-Free, Cardiovascular (Functional), Low/No/Reduced Allergen



# »»» Innovative Zucchini Launches: L3M (December 2015 – April 2016)

## Asda Extra Special Hand Finished Carrot, Courgette and Orange Loaf Cake (UK)

Asda Extra Special Hand Finished Carrot, Courgette and Orange Loaf Cake is claimed to be expertly crafted. This premium product is made with grated courgettes and carrot, topped with orange fondant icing, walnuts and caramelised orange strands. This vegetarian cake contains no artificial colours, flavours or hydrogenated fat, and retails in a partly recyclable 274g pack.



**Claims:**  
No Additives/Preservatives, Vegetarian, Premium, Low/No/Reduced Transfat, Ethical - Environmentally Friendly Package

## Harvest Sensations Spinach Splash (USA)

Harvest Sensations Spinach Splash is now available. The USDA organic certified product comprises of ready-to-juice fruits and veggies. It is said to be perfect to kick-start a juice or smoothie. No washing, peeling or cutting is required. The product retails in a 12-oz. pack featuring a QR code.



**Claims:**  
Organic, Ease of Use

## Bürger Grillers Veggie Style Vegetarian Pasta Pockets (Germany)

Bürger Grillers Veggie Style Vegetarische Maultaschen (Veggie Style Vegetarian Pasta Pockets) are for grilling. This marinated product retails in a 250g pack containing three units.



**Claims:**  
Vegetarian

## Dia Vegetable Lasagne (Spain)

Dia Lasaña Vegetal (Vegetable Lasagne) is now available. The microwaveable product is suitable for freezing and retails in a 600g pack with 2 x 300g units.



**Claims:**  
Microwaveable

# »»» Innovative Zucchini Launches: L3M (December 2015 – April 2016)

## Thiriet Sun Vegetables and Mozzarella Puff Pastry (France)

Thiriet Feuilleté Légumes du Soleil Mozzarella (Sun Vegetables and Mozzarella Puff Pastry) is made with a delicious crusty puff pastry filled with three vegetables, including grilled eggplant, grilled peppers, and grilled courgettes, with diced semi-dried tomatoes and soft mozzarella. The easy-to-prepare product is to be served with salad, can be prepared between 30-35 minutes in an oven and retails in a partly recyclable 500g pack.



**Claims:**  
Ethical - Environmentally Friendly Package, Ease of Use

## Naked Kale Blazer and Leafy Goodness Smoothie (Netherlands)

Naked Kale Blazer and Leafy Goodness Smoothie is a blend of seven juices and purées including kale broccoli and passionfruit. It is free from added sugars, colourings and preservatives, and contains vitamin K, which contributes to the maintenance of normal bones, and potassium, which provides normal muscle function. The product retails in a recyclable 450ml pack made of recycled plastic.



**Claims:**  
No Additives/Preservatives, Other (Functional), Low/No/Reduced Sugar, Bone Health, Ethical - Environmentally Friendly Package

## Monteli Organic Roasted Vegetable Pizza (USA)

Monteli Organic Roasted Vegetable Pizza is baked with spinach, red and yellow peppers, broccoli and zucchini in wood-fired oven. This USDA organic certified product is made in Italy with a naturally long leavening dough that has risen for hours. According to the manufacturer, the water used originates in the Dolomite mountains, an unspoiled natural environment, and this thin crust product is made using 100% sustainable solar energy and hydroelectric power from the great Italian basins.



**Claims:**  
No Additives/Preservatives, Organic, Low/No/Reduced Transfat, Ethical - Environmentally Friendly Product, GMO-Free

## Tesco Mediterranean Vegetable & Mozzarella Lattice Pie (UK)

Tesco Mediterranean Vegetable & Mozzarella Lattice Pie has been repackaged in a new designed pack. The limited edition and deep filled product is described as a shortcrust pastry base filled with tomato, mozzarella cheese and mixed vegetables, topped with a light and flaky puff pastry lid. It is suitable for vegetarians and home freezing, and retails in a recyclable 200g pack, featuring cooking instructions.



**Claims:**  
Vegetarian, Ethical - Environmentally Friendly Package, Limited Edition



# Australian Zucchini Launches: L3M (December 2015 – April 2016)

## Jimjam Foods Pick-a-Peck-a-Piccalilli Pickle

Jimjam Foods Pick-a-Peck-a-Piccalilli Pickle is a handmade preserve which is free from artificial colours, flavours, preservatives and bulking agents. The product retails in a 270g pack.



**Claims:**  
No Additives/Preservatives

## Cucina Del Nonno Vegetarian Lasagna

Cucina Del Nonno Vegetarian Lasagna is now available. This product consists of traditional fresh pasta sheets layered with roasted pumpkin, zucchini, eggplant and peppers mixed in a Napoli sauce and topped with mozzarella and parmesan cheese. This simply heat and eat product is ready in minutes in the microwave and contains no added preservatives. It retails in a 380g microwave and oven ready tray which serves one.



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

A close-up photograph of several purple eggplants with green stems, filling the entire frame. A large, dark grey circle is centered over the image, containing the text 'Eggplant.' in white.

Eggplant.





Both purchase and consumption frequency increased this wave.

Eggplant is primarily purchased through mainstream retailers. There has been an increasing trend in purchase from specialist vegetable retailers.

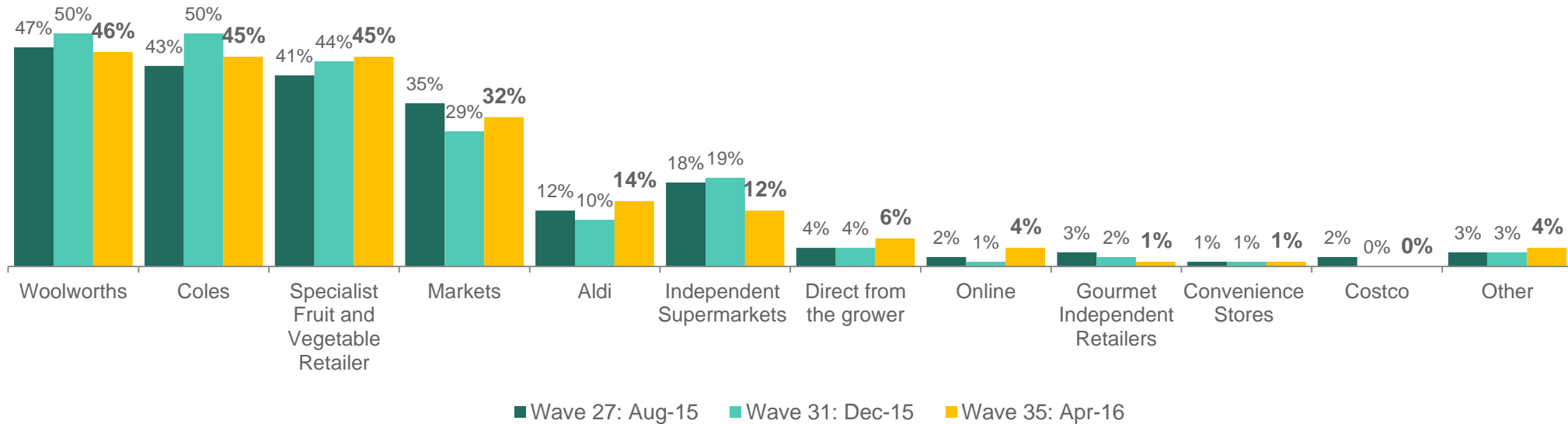


▼ 2.7 times, Wave 27  
 ▼ 2.9 times, Wave 31



▼ 4.6 times, Wave 27  
 ▼ 4.2 times, Wave 31

### 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 27 N=204, Wave 31 N=202, Wave 35 N=201



# Average Spend and Price Sensitivity



Average weight of purchase

On average, consumers purchase **900g** of eggplant, which has slightly increased this wave.

900g, Wave 27  
800g, Wave 31



Recalled last spend

Recalled last spend on eggplant purchase is **\$4.00**, consistent with the previous waves.

\$3.90, Wave 27  
\$4.00, Wave 31



Value for money

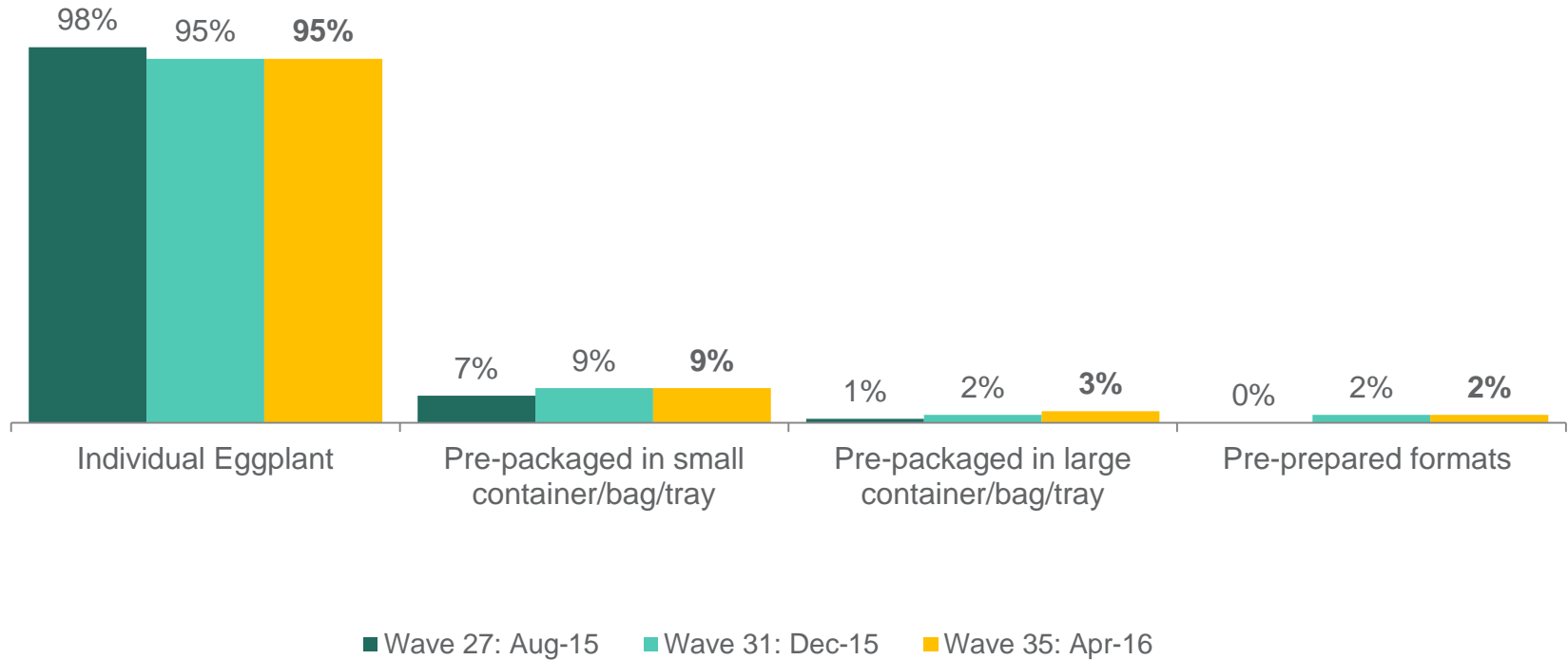
Overall consumers' perceived value for money is fair (**6.3/10**), which remains relatively consistent with previous waves.

6.3/10, Wave 27  
6.2/10, Wave 31

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 27 N=204, Wave 31 N=202, Wave 35 N=201



»»»→ The large majority of consumers purchase individual eggplants, consistent with the previous waves.



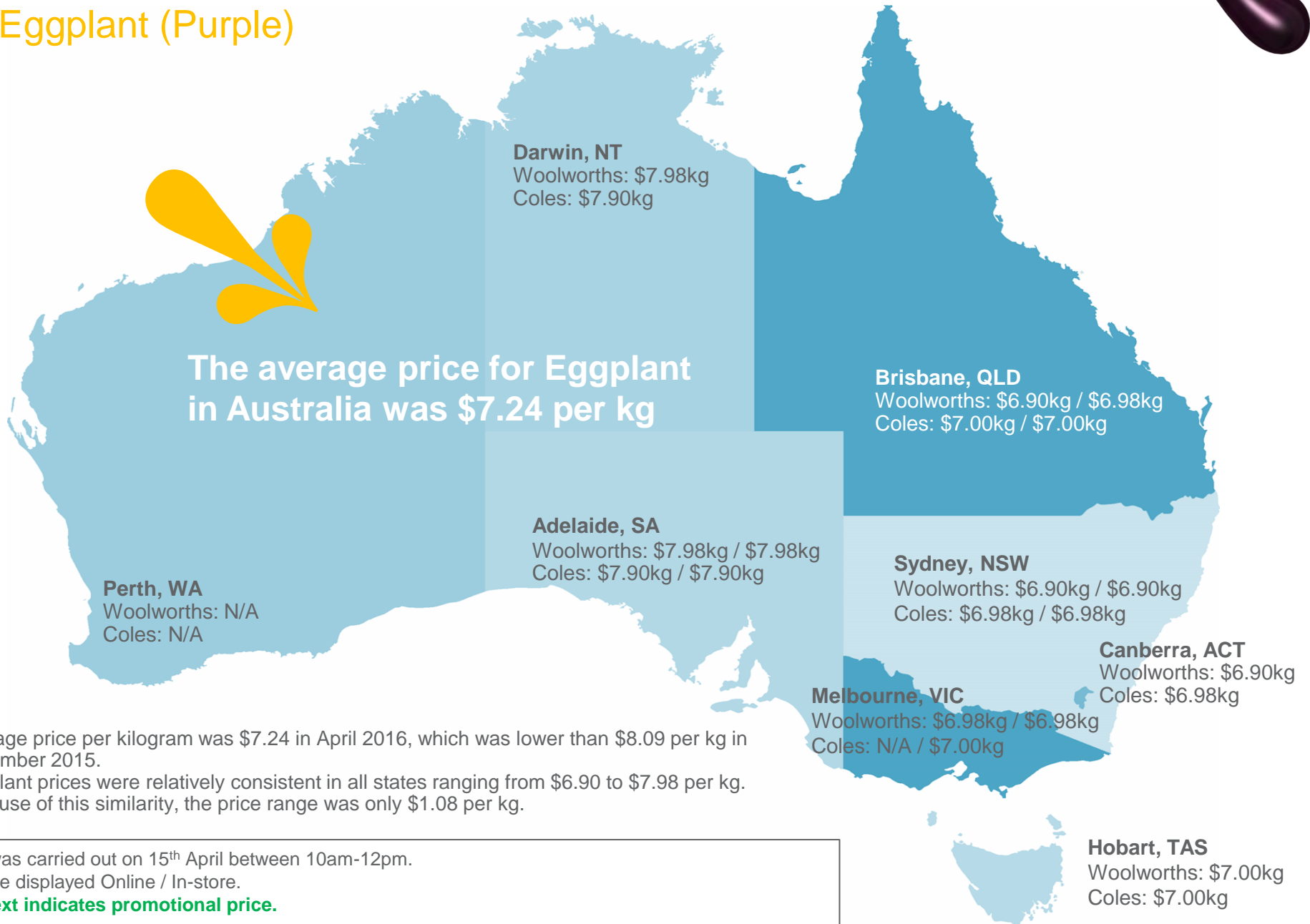
Q4b In what fresh formats do you typically purchase Eggplant?  
Sample Wave 27 N=204, Wave 31 N=202, Wave 35 N=201





# Online and In-store Commodity Prices

## Eggplant (Purple)



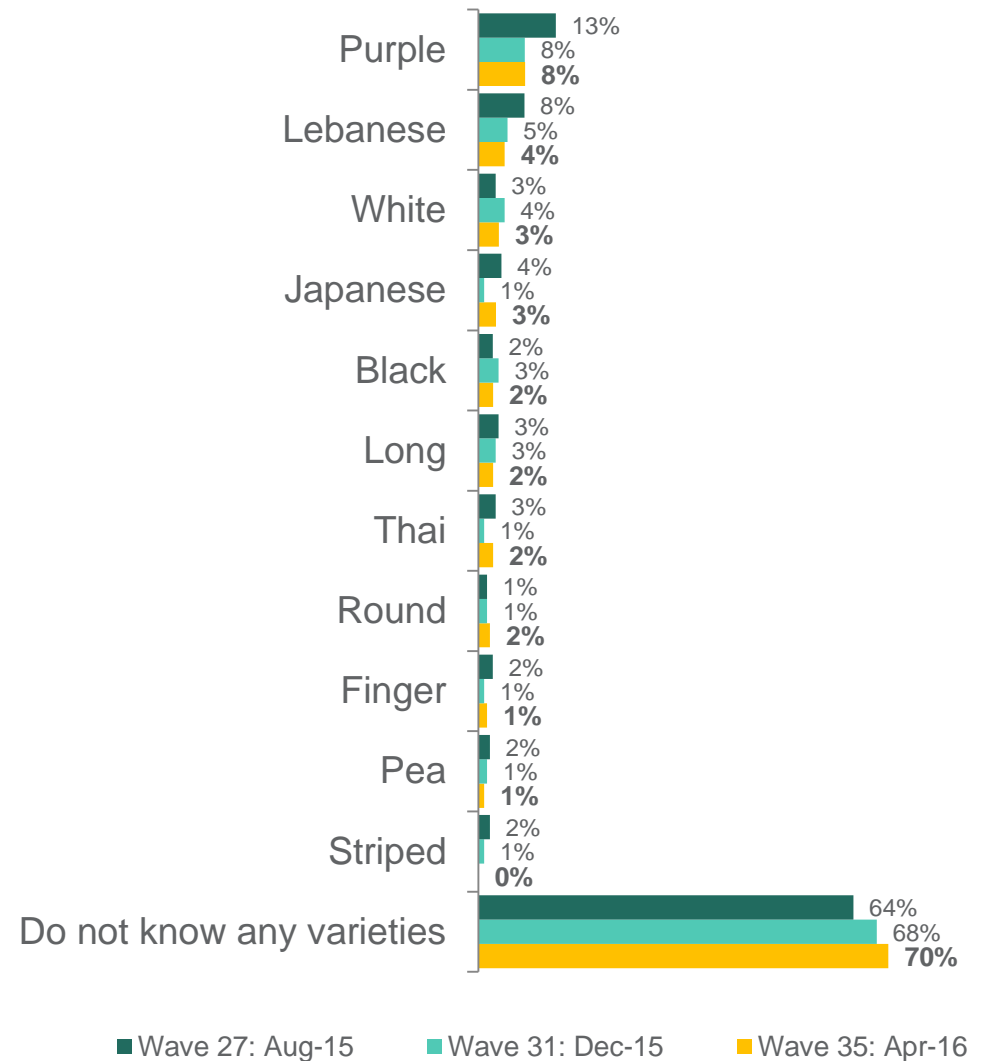
- Average price per kilogram was \$7.24 in April 2016, which was lower than \$8.09 per kg in December 2015.
- Eggplant prices were relatively consistent in all states ranging from \$6.90 to \$7.98 per kg.
- Because of this similarity, the price range was only \$1.08 per kg.

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



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

Consumers are prompted by colour and location for eggplant varieties.

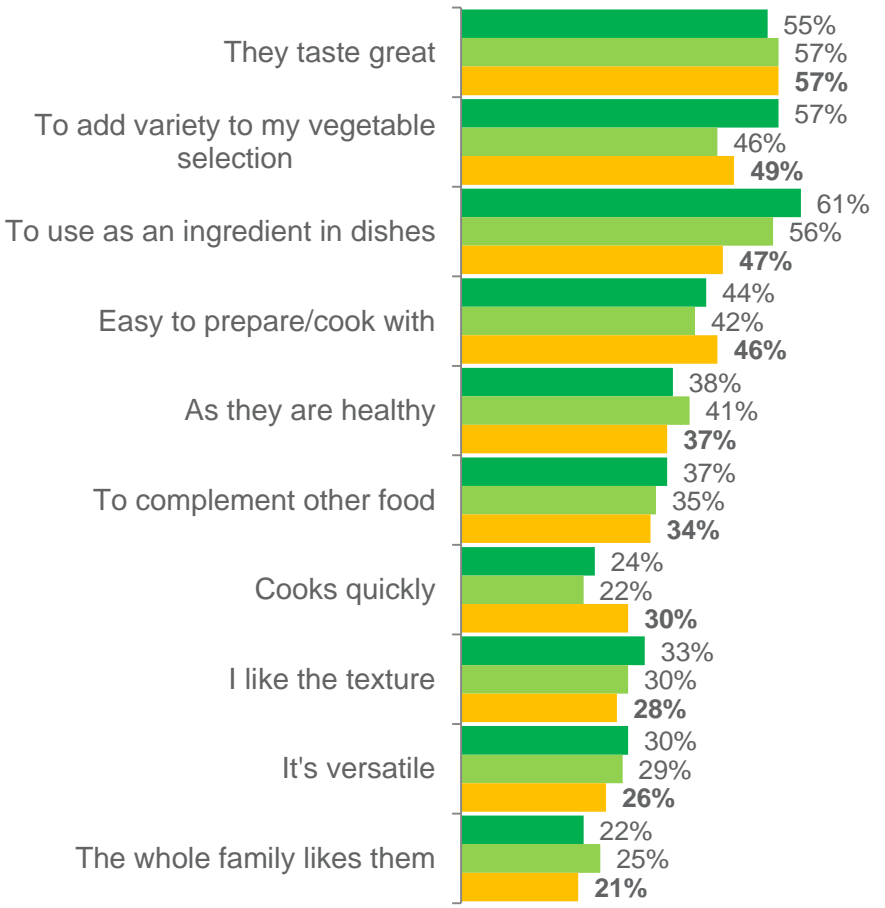


Q6a. What types/varieties of <commodity> are you aware of? (unprompted)  
Sample Wave 27 N=204, Wave 31 N=202, Wave 35 N=201

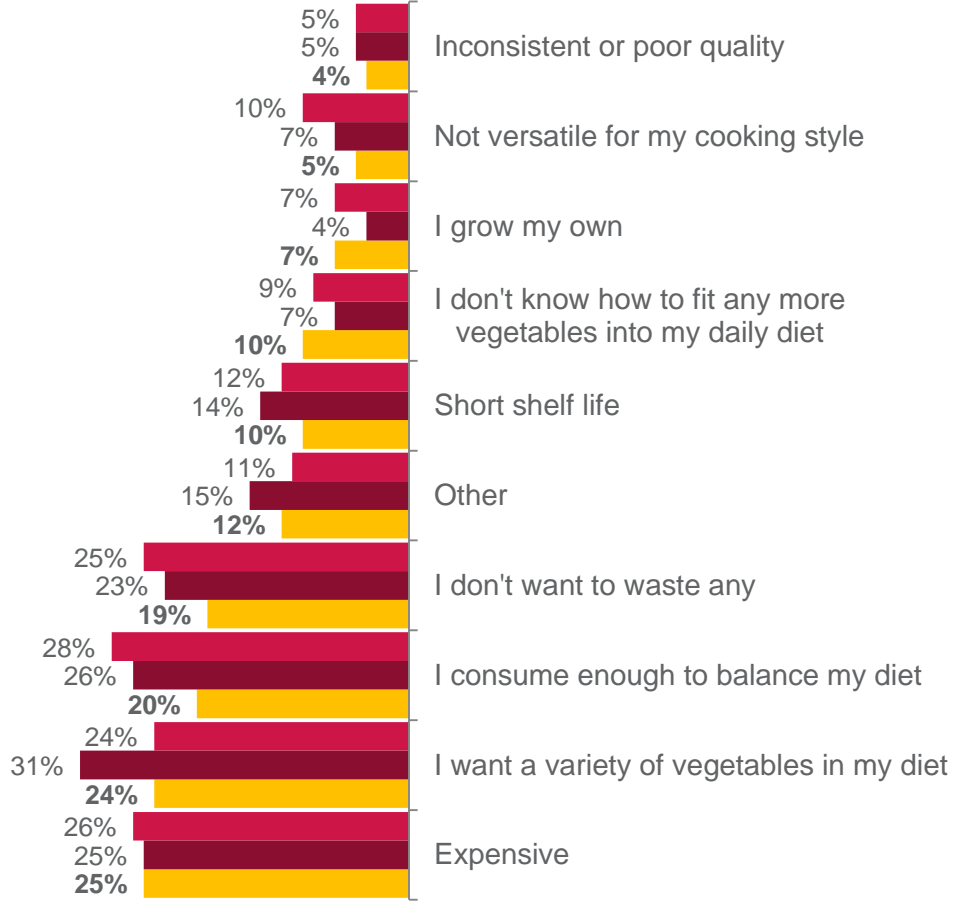


The key triggers to eggplant purchase are taste and adding variety, whereas price is the key barrier to purchase. There has been a noticeable increase in cooking quickly as a trigger to purchase, whilst not wanting to waste any is decreasing as a purchase barrier.

### Triggers



### Barriers



■ Wave 27: Aug-15   ■ Wave 31: Dec-15   ■ Wave 35: Apr-16

■ Wave 27: Aug-15   ■ Wave 31: Dec-15   ■ Wave 35: Apr-16

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 27 N=204, Wave 31 N=202, Wave 35 N=201



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

### Top 5 Consumption Occasions

Wave 31 Wave 35

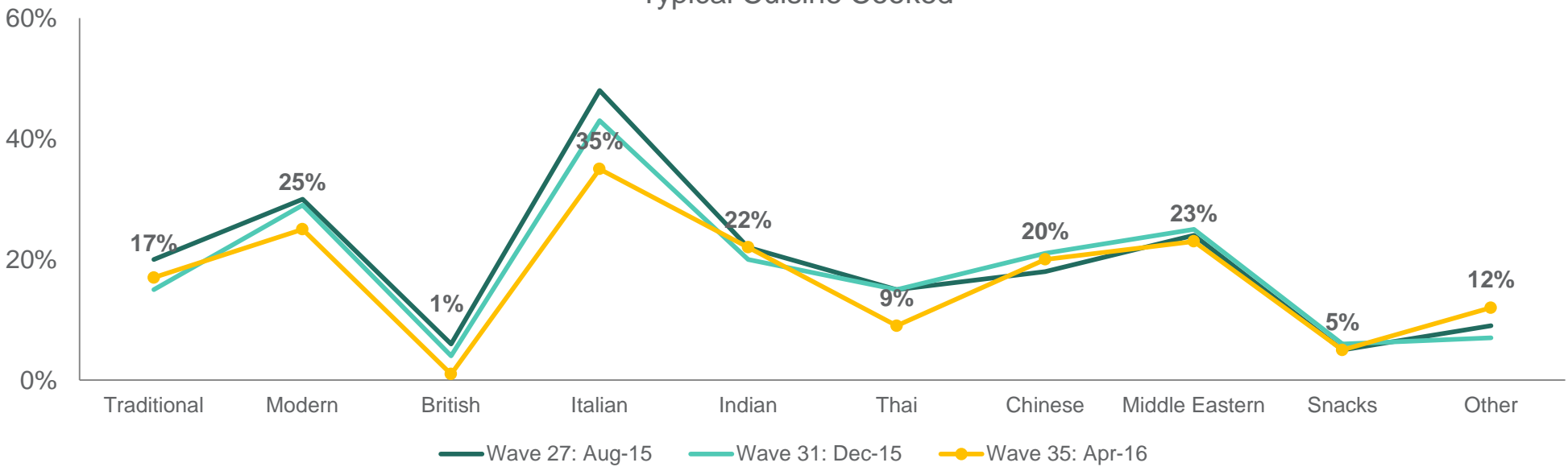
Dinner	61%	63%
Family Meals	54%	58%
Weekday Meals	35%	33%
Weekend Meals	24%	29%
Quick Meals	25%	23%

**16%**  
used eggplant when cooking a new recipe

▲ 21%, Wave 31

Dinner remains the main consumption occasion.

#### Typical Cuisine Cooked



← Australian → ← European → ← Asian → ← Other Cuisines →

Q10. What cuisines do you cook/consume that use <commodity> ?  
Q11. Which of the following occasions do you typically consume/use <commodity> ?  
Sample Wave 27 N=204, Wave 31 N=202, Wave 35 N=201



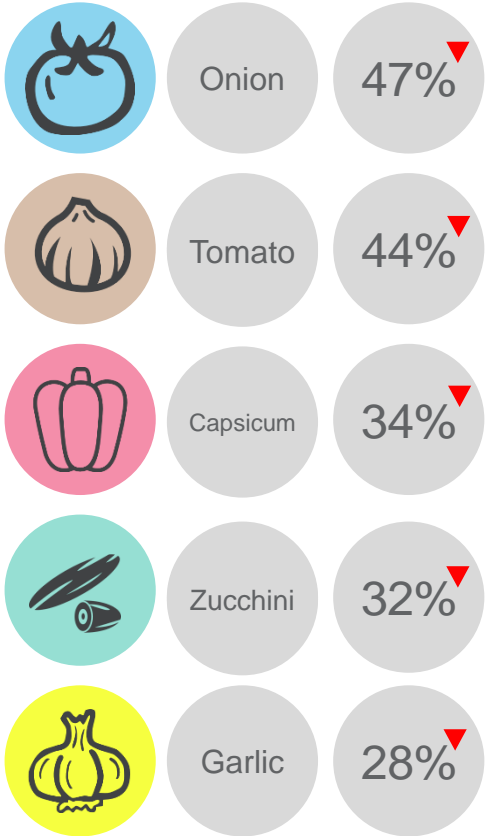
▼ : Indicates LOWER score than current wave.  
▲ : Indicates HIGHER score than current wave.



Eggplant is generally served with onions, tomato and capsicums. Consumers prefer to fry, grill and roast eggplant. Baking and slow cooking have declined as cooking styles over the last three waves.



Accompanying Vegetables



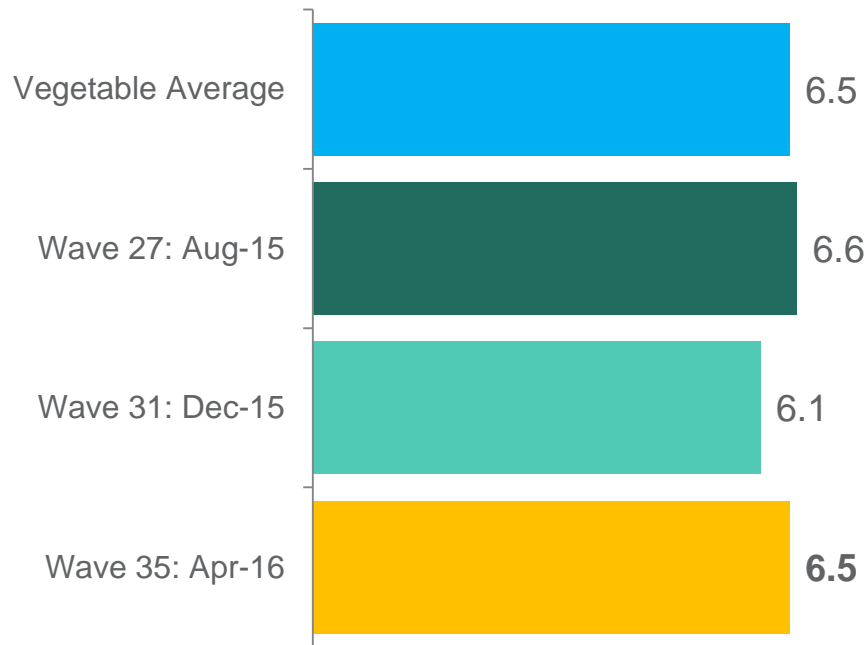
Top Cooking Styles

	Wave 27	Wave 31	Wave 35
Frying	40%	46%	<b>46%</b>
Grilling	40%	40%	<b>42%</b>
Roasting	38%	36%	<b>36%</b>
Stir frying	35%	38%	<b>35%</b>
Baking	39%	36%	<b>33%</b>
Sautéing	27%	25%	<b>26%</b>
Slow Cooking	27%	23%	<b>13%</b>
Steaming	8%	13%	<b>11%</b>
Soup	6%	6%	<b>7%</b>
Mashing	4%	8%	<b>5%</b>

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 27 N=204, Wave 31 N=202, Wave 35 N=201



The importance of provenance has increased in Wave 35, which now sits in line with the Vegetable Average. Knowing that eggplants are grown in Australia remains highly important information for consumers.



Q14. When purchasing Eggplant, how important is Provenance to you?  
Q15. And when purchasing Eggplant, how important is that it is grown in Australia?  
Sample Wave 27 N=204, Wave 31 N=202, Wave 35 N=201



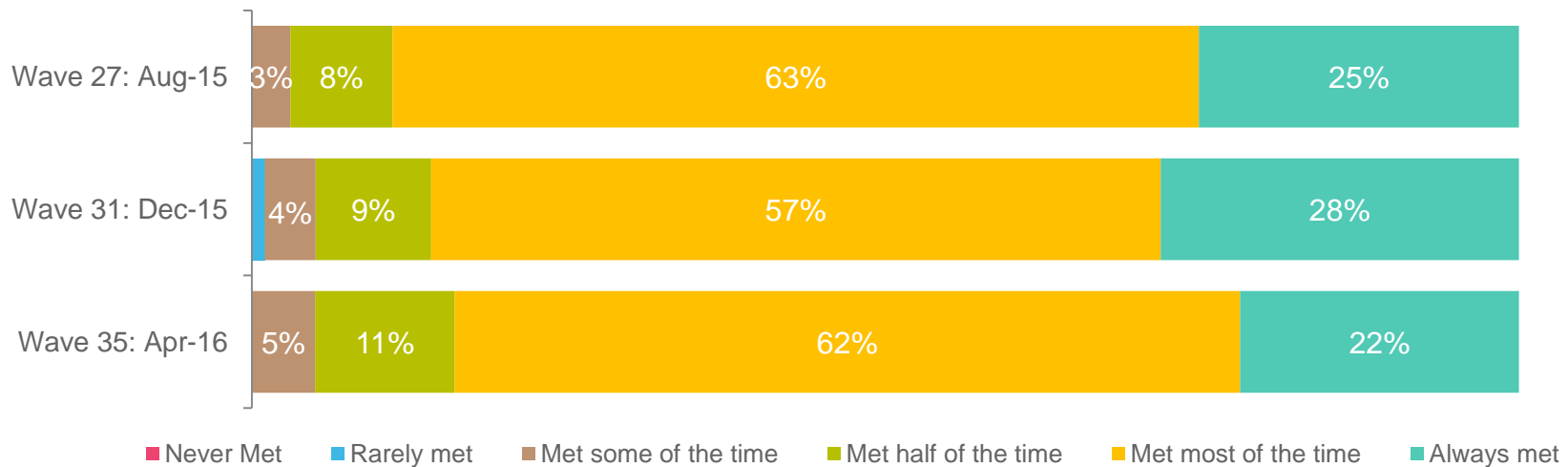


Consumers expect eggplant to remain fresh for just over one week once purchased, consistent with the previous wave. Expectations of freshness are predominantly being met most of the time, with a decline in freshness always being met this wave.

Expected to stay fresh for 7.6 days

- ▲ 7.7 days, Wave 27
- 7.6 days, Wave 31

### 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 27 N=204, Wave 31 N=202, Wave 35 N=201



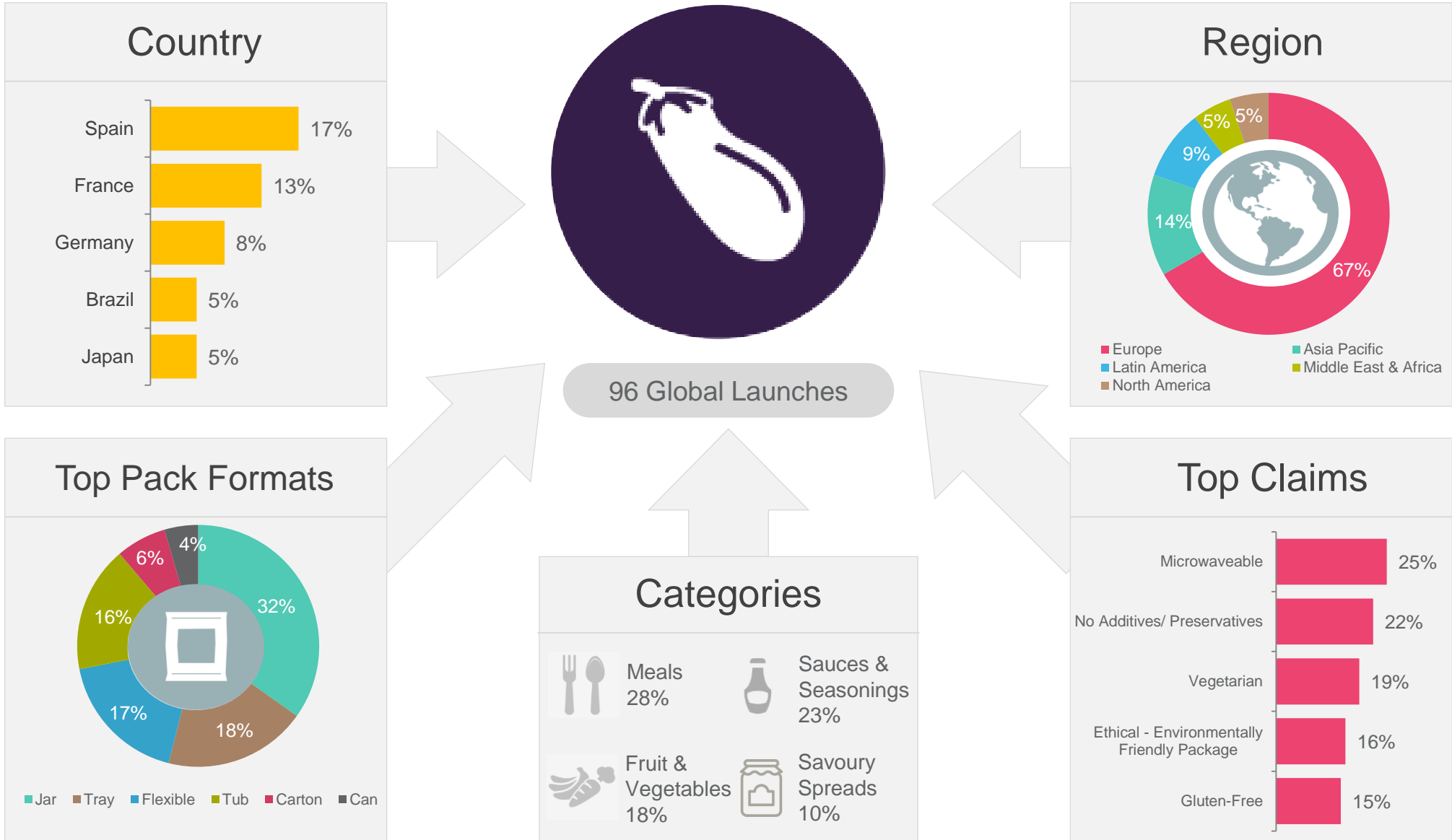
# Trends: Eggplant



# Eggplant Global Launches

## December 2015 – April 2016

There were 96 products that contained Eggplant as an ingredient launched globally over the last three months. The majority of those launches occurred in Europe. Products launched include meals, sauces, and fruits & vegetables.





# Eggplant Product Launches: Last 3 Months (December 2015 – April 2016) Summary

- There were 96 eggplant products launched globally in the last three months.
- There were four products launched in Australia this wave.
- The majority of eggplant launches occurred in Europe (67%) and Asia Pacific (14%).
- Categories for launches were meals (28%), sauces and seasonings (23%), and fruits & vegetables (18%).
- Key claims used on products included microwaveable (25%), no additives/preservatives (22%) and vegetarian (19%).
- A variety of packaging formats were used including jars (32%), trays (18%), and flexible packaging (17%).
- The most innovative launch this wave included a Mediterranean Vegetables and Chia Seeds Tortelloni from Germany (other examples can be found in the following pages).



Source: Mintel (2016)

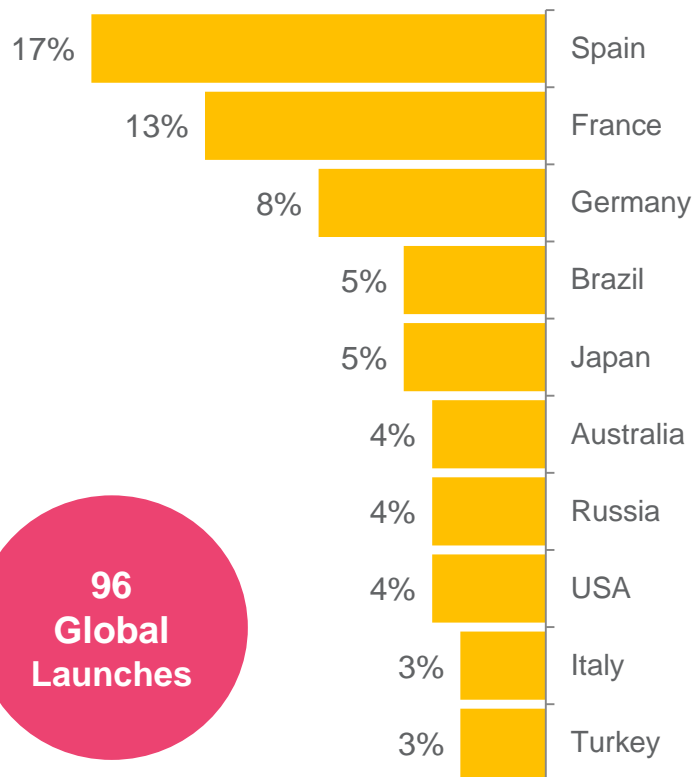




# Eggplant Launches

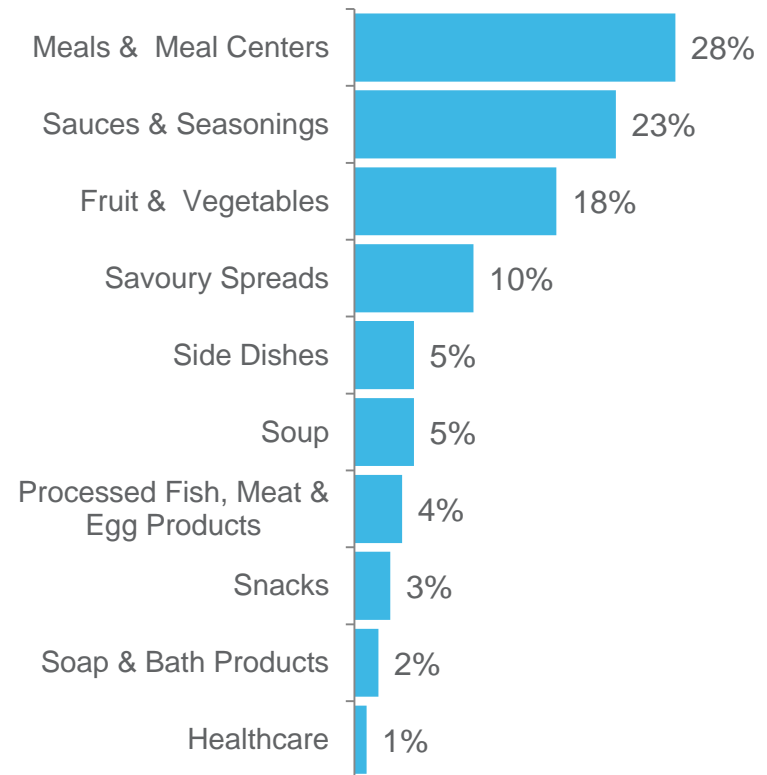
- Countries with the greatest number of launches were Spain, France and Germany.
- Products launched were primarily meals, sauces, and fruits & vegetables.

## Top Launch Countries



96  
Global  
Launches




## Top Launch Categories





Jars, trays and flexible packaging formats were most commonly used for new products. Microwaveable and no additives/ preservatives were the key claims used.

### Pack Formats Used

Global		Jar	32%
		Tray	18%
		Flexible	17%
Europe		Jar	36%
		Flexible	17%
		Tray	16%

### Top Claims Used

Global		Microwaveable	25%
		No Additives/Preservatives	22%
		Vegetarian	19%
Europe		No Additives/Preservatives	20%
		Microwaveable	19%
		Organic	19%

# »»» Innovative Eggplant Launches: L3M (December 2015 – April 2016)

## Bofrost Moussaka (France)

Bofrost Moussaka has been repackaged and is now available in a newly designed pack. The product comprises a beef based preparation cooked with tomatoes, pre-fried aubergines and cheddar sauce. It can be heated in the microwave in ten minutes and retails in a newly designed 420g pack featuring a QR code.



**Claims:**  
Microwaveable

## Santa Maria Grilled Paprika Pizza Sauce (Sweden)

Santa Maria Tomat- och Paprikasås för Pizza (Grilled Paprika Pizza Sauce) is now available. The product retails in a 280ml pack.



**Claims:**  
N/A

## U Flaky Butter Pastry Base Filled with Sun Vegetables (France)

U Paniers Feuilletés Légumes du Soleil (Flaky Butter Pastry Base Filled with Sun Vegetables) is now available. This frozen product made with pure butter pastry contains tomatoes, peppers, eggplant and onions, and cooks in 20 minutes in an oven. It retails in a 400g recyclable pack containing four 100g pieces.



**Claims:**  
Ethical - Environmentally Friendly Package

## San Fabio Vegetarian Pizza (Germany)

San Fabio Pizza (Vegetarian Pizza) has been stone baked over beechwood and is topped with mozzarella, aubergine, peppers, zucchini, provolone, and green asparagus. It retails in a 405g pack.



**Claims:**  
Vegetarian



# »»» Innovative Eggplant Launches: L3M (December 2015 – April 2016)

## Marque Repère Notre Jardin Vegetables for Ratatouille (Spain)

Marque Repère Notre Jardin Légumes por Ratatouille (Vegetables for Ratatouille) are ready to cook. The product comprises a mix of tomatoes, aubergines, courgettes, onions, and green and red peppers. It retails in a 1kg easy open pack featuring a recipe suggestion.



**Claims:**  
Ease of Use, Convenient Packaging

## Vegan Vital Food Mediterranean Vegetables and Chia Seeds Tortelloni (Germany)

Vegan Vital Food Mediterranes Gemüse und Chia Samen Tortelloni (Mediterranean Vegetables and Chia Seeds Tortelloni) has been added to the range. The organic pasta is suitable for vegans and vegetarians and free from flavour enhancers, preservatives and lactose. This product retails in a 250g pack featuring the bio, EU Leaf, Austria BIO Garantie and V-Label seal from the European Vegetarian Union logos.



**Claims:**  
No Additives/Preservatives, Organic, Vegetarian, Low/No/Reduced Allergen, Vegan, No Animal Ingredients, Low/No/Reduced Lactose

## CocinArte Miniaturas Goat Cheese and Vegetables Pockets (Spain)

CocinArte Miniaturas Saquitos de Queso de Cabra y Verduras (Goat Cheese and Vegetables Pockets) are now available. They can be prepared in a pan or deep-fried in three minutes. This product retails in a 120g pack containing eight units.



**Claims:**  
N/A

## 2 Go Yummy Fish Saydyah Ready to Eat Fully Cooked Meal (Egypt)

2 Go Yummy Fish Saydyah Ready to Eat Fully Cooked Meal includes rice, egg plant and fish soup. This halal certified microwaveable product retails in a 900g pack.



**Claims:**  
Microwaveable, Halal, Ease of Use

# »»» Innovative Eggplant Launches: L3M (December 2015 – April 2016)

## Organik Bahce Gluten Free Organic Tomato Soup Mix (Turkey)

Organik Bahce Glutensiz Organik Domates Çorbasi (Gluten Free Organic Tomato Soup Mix) is made with dried vegetables and contains amaranth that is rich in fibre and high in protein, and buckwheat that contains 11% protein and 2% fat and is free from gluten. In the drying process, no gamma rays have been used. This product retails in a 75g pack featuring a QR code and a recipe suggestion. The manufacturer sources its energy from solar panel technology and natural gas to try to reduce its carbon fo...



**Claims:**  
High/Added Fiber, Organic, Gluten-Free, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Product, High Protein

## Mora Happas Grilled Aubergine, Peper and Courgette Croquettes (Spain)

Mora Happas Aperetivos Salados Berenjena a la Parilla, Pimiento y Calabacín (Grilled Aubergine, Pepper and Courgette Croquettes) are now available. The product is free from artificial flavours, colourants and flavour enhancers, it is said to be crunchy on the outside and is ready after ten minutes in the oven. It retails in a 10 x 25g pack. The manufacturer states to strive to achieving a sustainable type of management.



**Claims:**  
No Additives/Preservatives

## Chez Carrefour Sélectionné par nos Bouchers! Repas Minut' Provençal Style Minute Meal Kit (France)

Chez Carrefour Sélectionné par nos Bouchers! Repas Minut' A la Provencale (Provençal Style Minute Meal Kit) contains ground meat from French origin, vegetables and sauce. The product can be prepared in eight minutes and is said to go well with pastas and rice. It retails in a 725g pack which provides four portions.



**Claims:**  
Time/Speed

## Gringo Jack's Curried Eggplant & Garbanzo Salsa (USA)

Gringo Jack's Curried Eggplant & Garbanzo Salsa is now available. The kosher certified and all natural product comprises fresh ripe tomatoes, eggplant, onions, jalapeno, garbanzo beans and a curried twist. It is hand crafted in small batches for quality and flavor, and is low in sodium. It is suitable for vegetarians, and retails in a 16-oz. pack.



**Claims:**  
All Natural Product, Kosher, Low/No/Reduced Sodium, Vegetarian

A close-up photograph of several green spring onions, showing their long, pointed leaves and the white bulbous base. The image is slightly blurred, focusing on the texture and color of the vegetable.

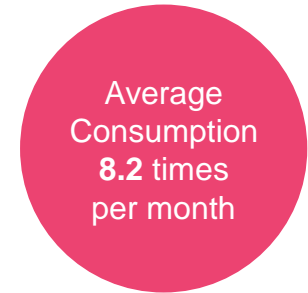
Spring Onion.





Both purchase and consumption frequency have declined this wave.

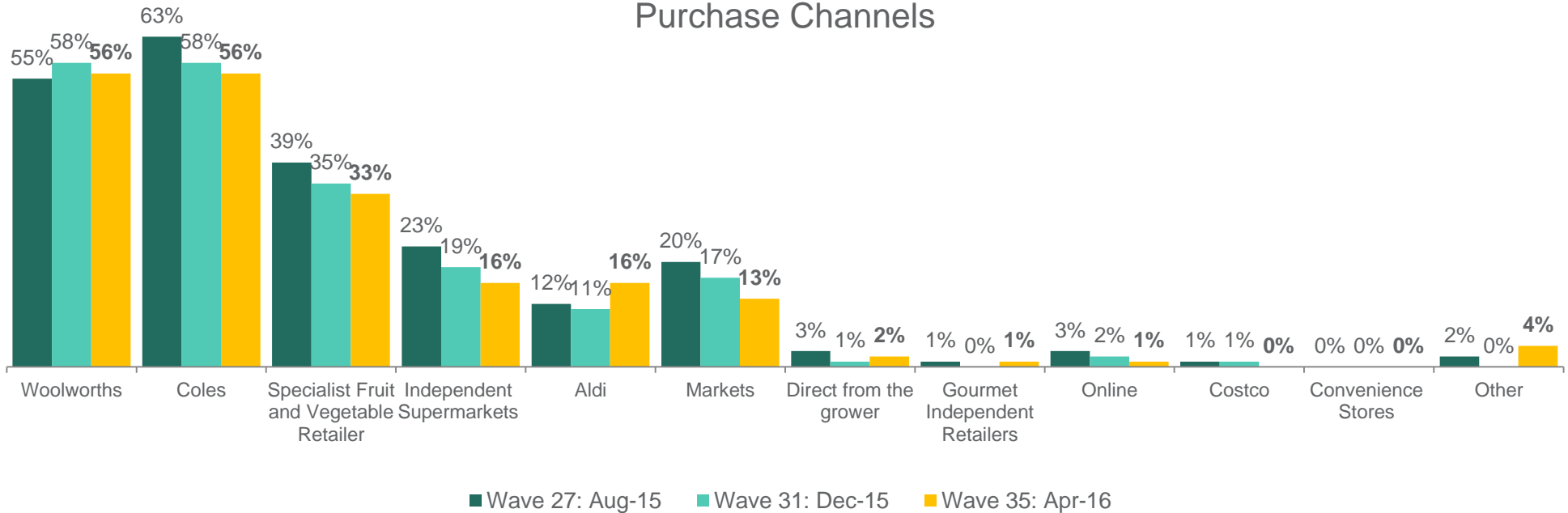
Spring onions are generally purchased from mainstream retailers such as Woolworths and Coles. Specialist vegetable retailers, independent supermarkets and markets have all experienced a downwards trend over the last three waves.



▲ 2.8 times, Wave 27  
▲ 3.2 times, Wave 31

▼ 7.6 times, Wave 27  
▲ 8.9 times, Wave 31

### Purchase Channels



Q1. On average, how often do you purchase Spring Onion?  
 Q2. On average, how often do you consume Spring Onion?  
 Q5. From which of the following channels do you typically purchase Spring Onion?  
 Sample Wave 27 N=203, Wave 31 N=202, Wave 35 N=204



# Average Spend and Price Sensitivity



Average weight of purchase

The average consumer typically purchases **300g** of spring onions, lower than the previous waves.

- ▲ 400g, Wave 27
- ▲ 400g, Wave 31



Recalled last spend

Recalled last spend on spring onions was **\$2.40**, which is in line with spend recorded in Wave 27.

- \$2.40, Wave 27
- ▲ \$2.80, Wave 31



Value for money

Consumers' perceived value for money is fair for spring onions (**6.2/10**), consistent with past waves.

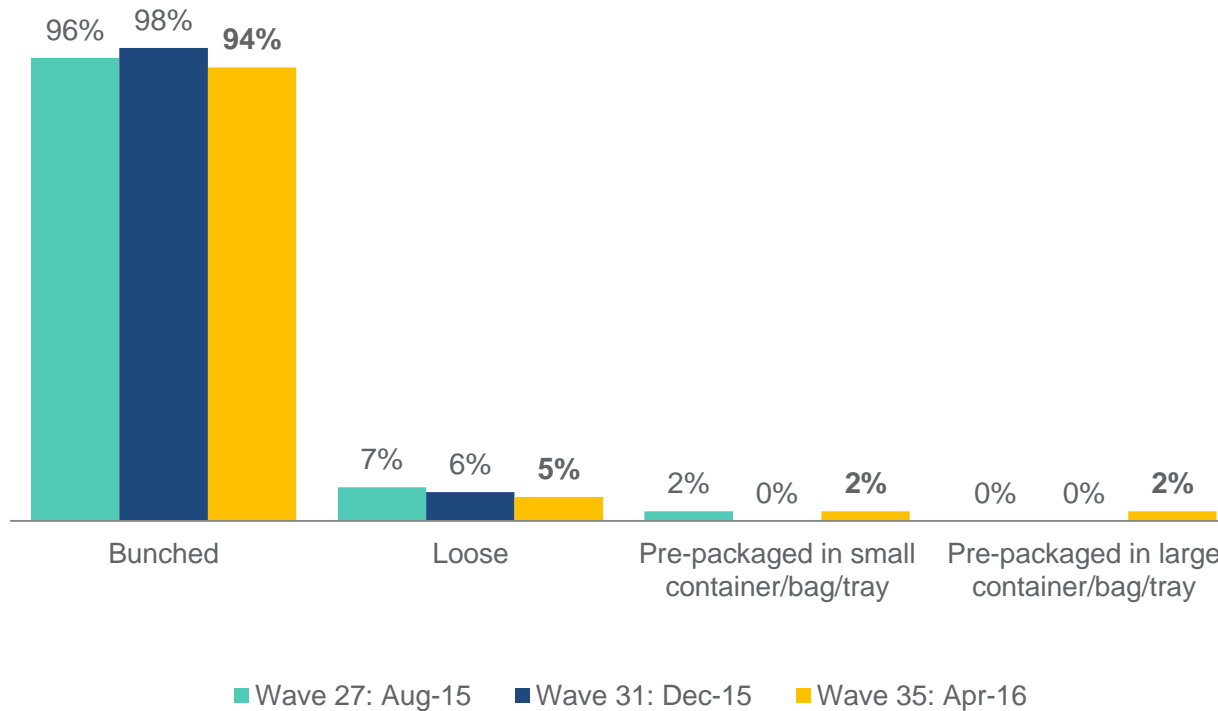
- 6.2/10, Wave 27
- ▼ 6.1/10, Wave 31

Q3. How much Spring Onion do you typically purchase when you shop for it?  
 Q3b. To the best of your memory how much did this cost on your most recent typically purchase?  
 Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)  
 Sample Wave 27 N=203, Wave 31 N=202, Wave 35 N=204





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

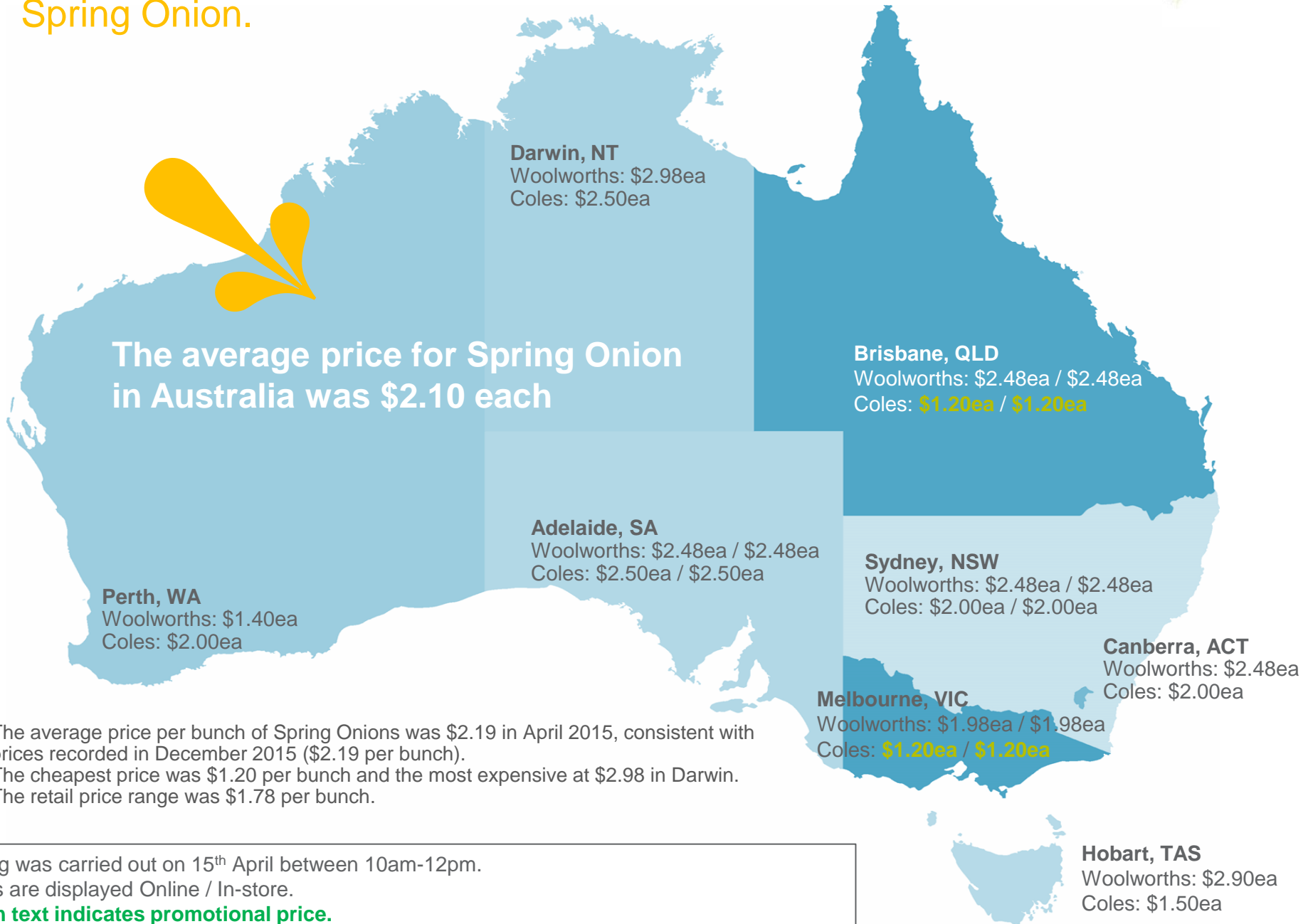


Q4b In what fresh formats do you typically purchase Spring Onion?  
Sample Wave 27 N=203, Wave 31 N=202, Wave 35 N=204



# Online and In-store Commodity Prices.

## Spring Onion.



- The average price per bunch of Spring Onions was \$2.19 in April 2015, consistent with prices recorded in December 2015 (\$2.19 per bunch).
- The cheapest price was \$1.20 per bunch and the most expensive at \$2.98 in Darwin.
- The retail price range was \$1.78 per bunch.

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





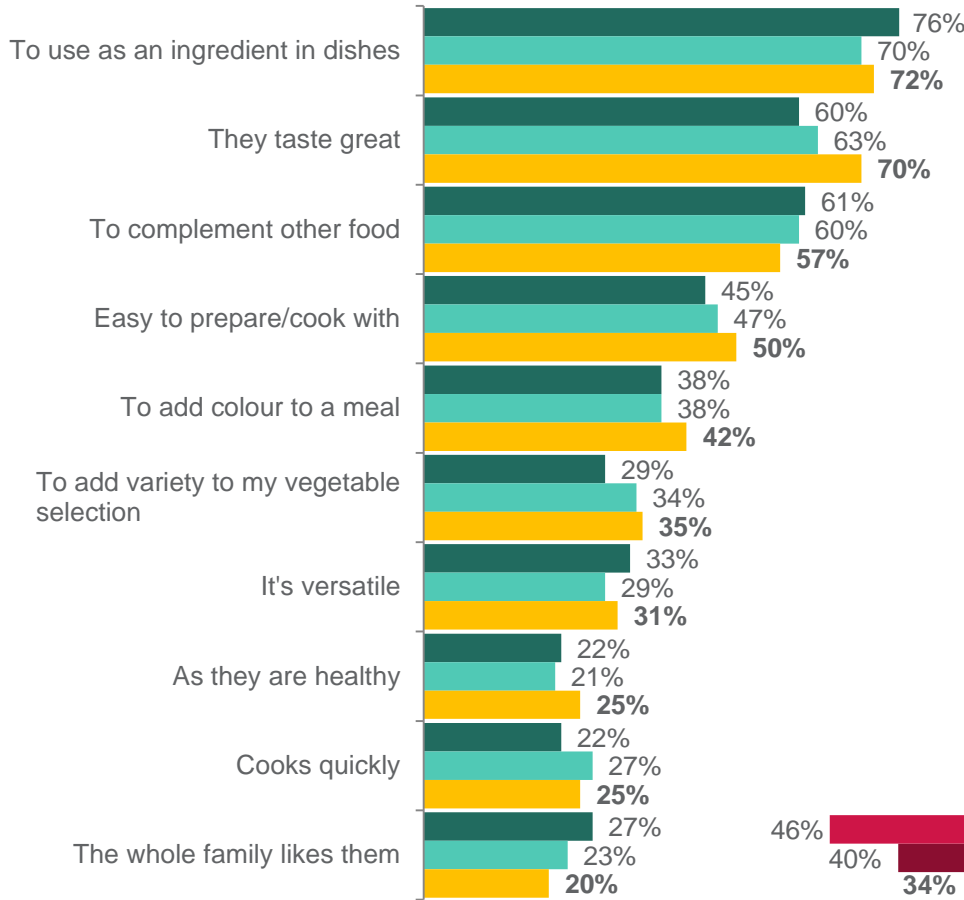
Awareness of spring onion varieties remains low, with 86% of consumers unable to recall a type.





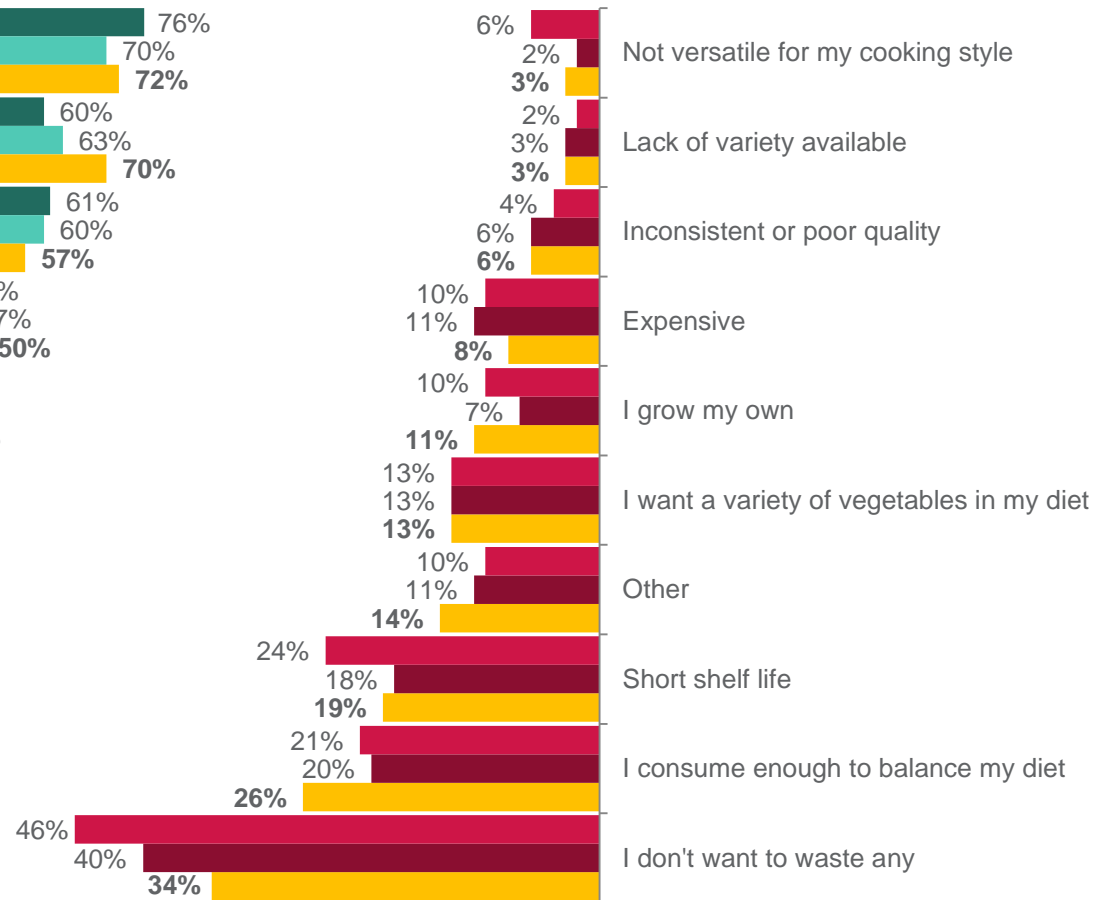
Using spring onion as an ingredient in dishes, tasting great and complementing other foods are the key drivers of purchase. In contrast, the key barriers are not wanting to waste any, already consuming enough to balance their diet and short shelf life.

### Triggers



■ Wave 27: Aug-15 ■ Wave 31: Dec-15 ■ Wave 35: Apr-16

### Barriers



■ Wave 27: Aug-15 ■ Wave 31: Dec-15 ■ Wave 35: Apr-16

Q7. Which of the following reasons best describes why you purchase Spring Onion?  
Q8. Which reason best describes why you don't buy Spring Onion more often?  
Sample Wave 27 N=203, Wave 31 N=202, Wave 35 N=204



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

Meal occasions tend to occur during dinner.

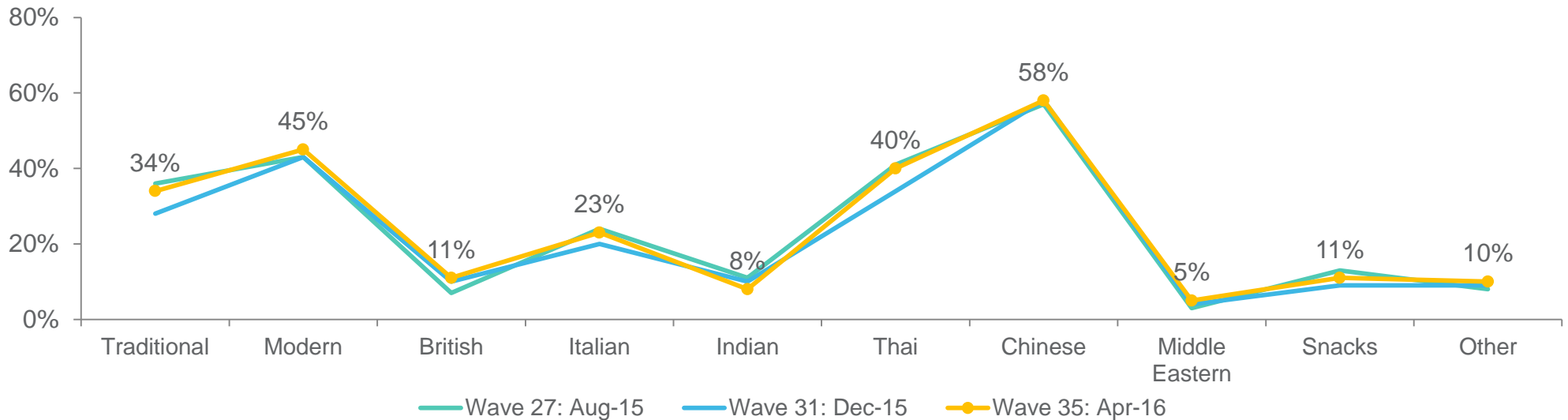
### Top 5 Consumption Occasions

	Wave 31	Wave 35
Dinner	71%	72%
Family Meals	58%	56%
Quick Meals	56%	52%
Weekday Meals	44%	42%
Weekend Meals	40%	39%

**28%** used spring onions when cooking a new recipe

▼ 29%, Wave 31

### Typical Cuisine Cooked



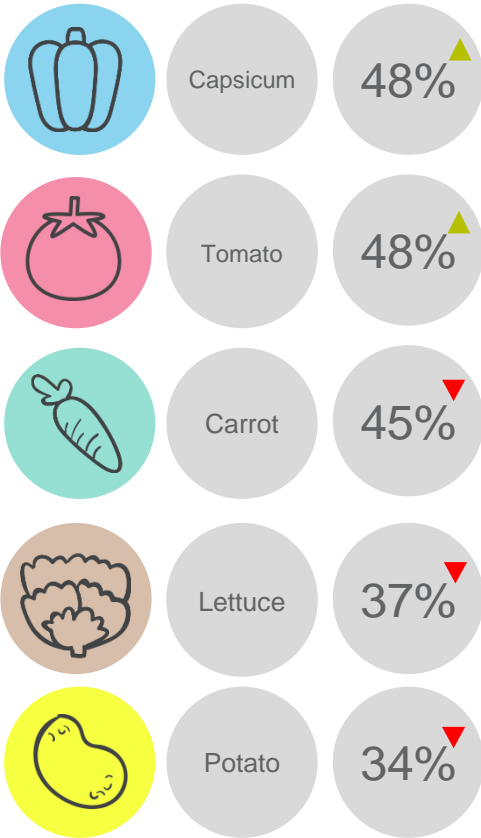
← Australian → ← European → ← Asian → ← Other Cuisines →

Q10. What cuisines do you cook/consume that use Spring Onion?  
 Q11. Which of the following occasions do you typically consume/use Spring Onion?  
 Sample Wave 27 N=203, Wave 31 N=202, Wave 35 N=204



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

### Accompanying Vegetables



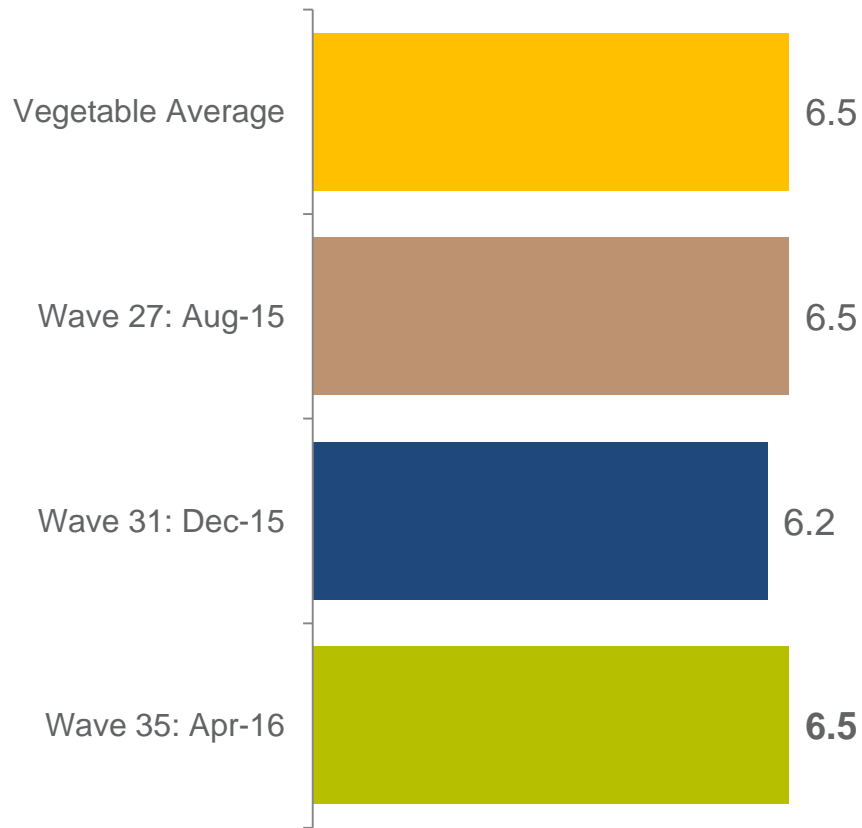
### Top Cooking Styles

	Wave 27	Wave 31	Wave 35
Stir frying	72%	69%	72%
Raw	52%	54%	49%
Soup	29%	28%	30%
Sautéing	33%	31%	26%
Frying	28%	30%	22%
Slow Cooking	10%	10%	15%
Steaming	6%	5%	8%
Baking	10%	5%	8%
Roasting	3%	8%	5%
Other	6%	2%	5%

Q9. How do you typically cook Spring Onion?  
Q10a. And when are you serving Spring Onion which of the following do you also serve together with this?  
Sample Wave 27 N=203, Wave 31 N=202, Wave 35 N=204



The importance of provenance has returned to levels seen in Wave 27, which sits in line with the Vegetable Average. Knowing that spring onions are grown in Australia is still the most important provenance information for consumers.



Q14. When purchasing Spring Onion, how important is Provenance to you?  
Q15. And when purchasing Spring Onion, how important is that it is grown in Australia?  
Sample Wave 27 N=203, Wave 31 N=202, Wave 35 N=204

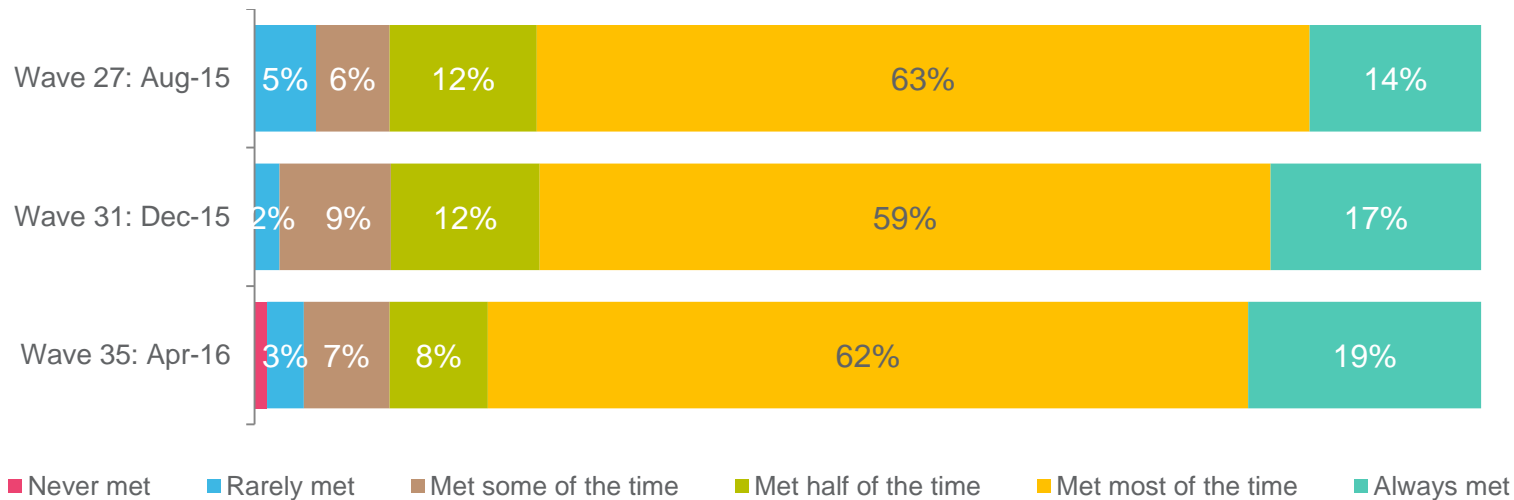


Consumers expect spring onion to remain fresh for around 9 days once purchased, which is being met most of the time.

Expected to stay fresh for 8.8 days

- ▲ 9.1 days, Wave 27
- ▼ 8.6 days, Wave 31

### Expectations Met



Q12. How long do you expect Spring Onion to stay fresh for, once you have purchased it?  
 Q13. How often is this length of freshness met when you buy Spring Onion?  
 Sample Wave 27 N=203, Wave 31 N=202, Wave 35 N=204

A close-up photograph of several fresh spring onions with their green stalks and white bulbous ends. A large, dark grey circle is overlaid in the center of the image, containing the title text.

# Spring Onion Product Launch Trends.



# Spring Onion Global Launches

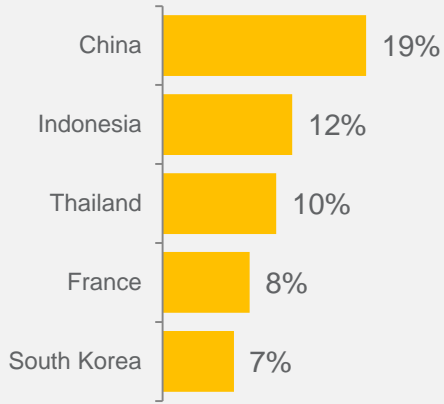
## December 2015 – April 2016

There were 411 spring onion products launched globally over the last three months. The majority of launches were in China and Indonesia. Categories for launches were meals and sauces & seasonings. Key packaging for spring onion products were flexible formats.

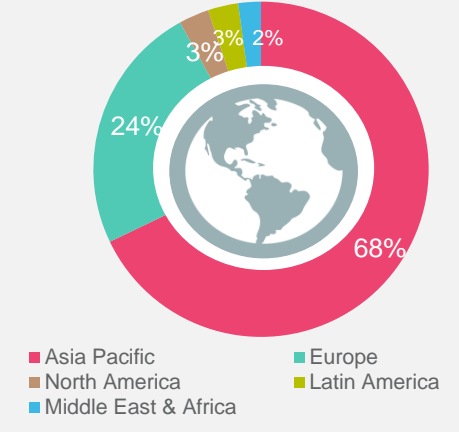


411 Global NPDs

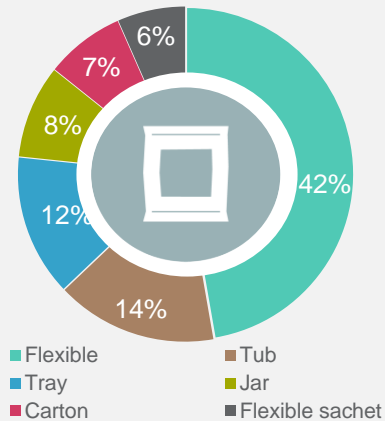
### Country



### Region



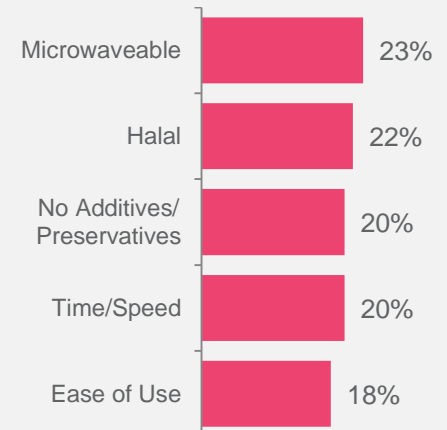
### Top Pack Formats



### Categories



### Top Claims





## Spring Onion Product Launches: Last 3 Months (December 2015 – April 2016) Summary

- There were 411 launches in the past 3 months globally that contained spring onions as an ingredient.
- There were 9 products launched in Australia over the past three months.
- Asia Pacific (68%) and Europe (24%) were the key regions for launches.
- Flexible packaging (42%), and tubs (14%) were the most common formats used for products.
- The main categories for launches were meals (40%), seasonings & sauces (24%), and snacks (16%).
- Claims used on products included microwaveable (23%), halal (22%), and no additives/preservatives (20%).
- The most innovative product launched was a Beef, Spring Onion & Garlic Spice Oil from South Korea. Other examples can be found in the following pages.

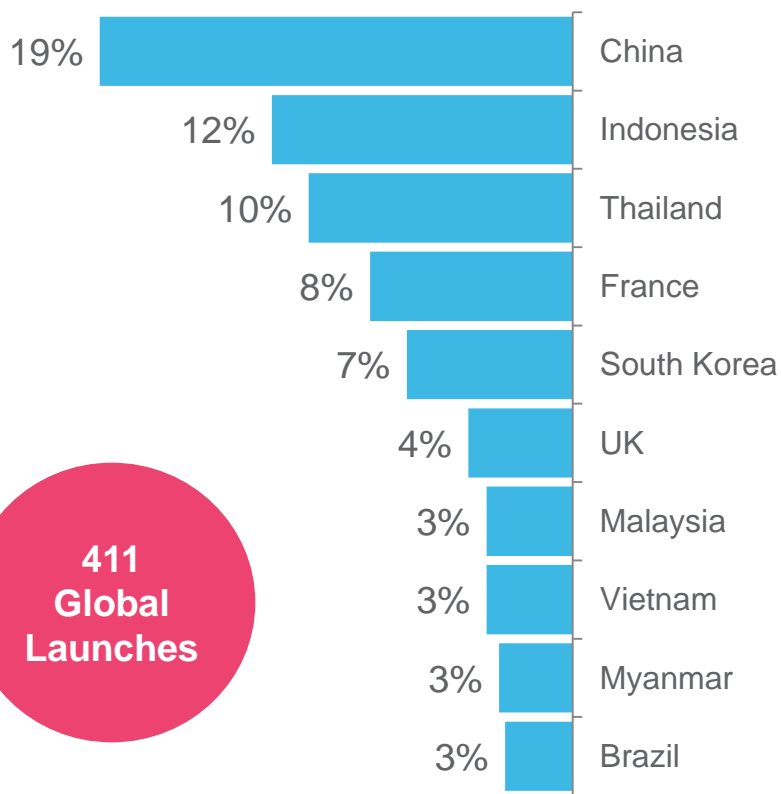


Source: Mintel (2016)

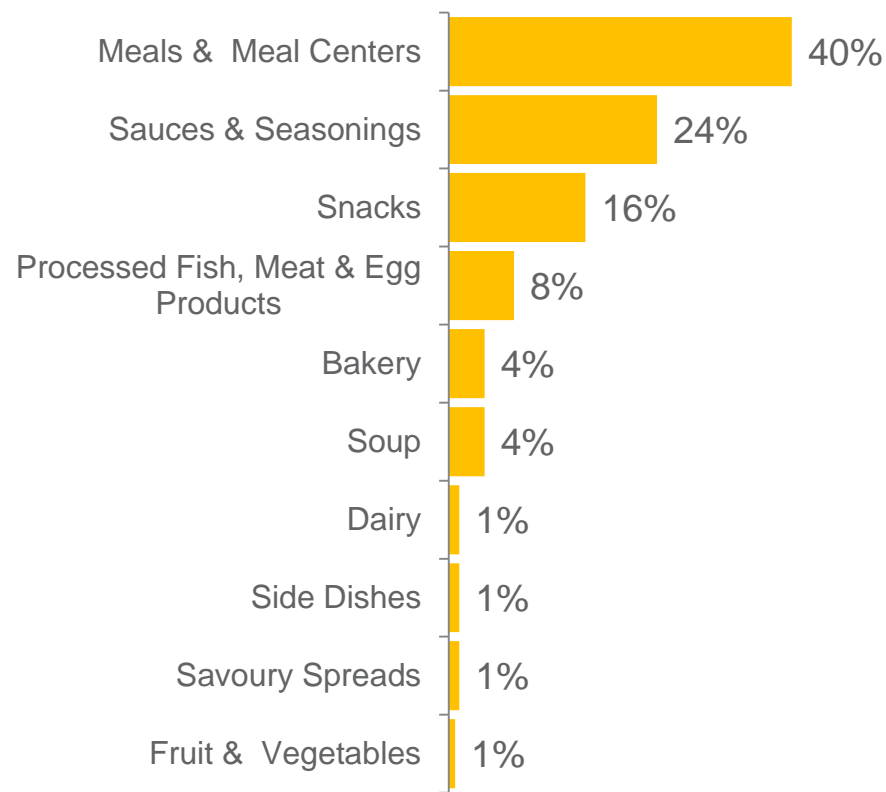


The majority of launches occurred in China and Indonesia. The key categories for spring onion launches are meals, sauces & seasonings, snacks, and processed products.

Top Launch Countries



Top Launch Categories












411  
Global  
Launches










➤ The main claims globally were microwaveable, halal and no additives & preservatives.

Flexible packaging, tubs and trays are the main packaging formats for spring onion products, consistent with the previous wave.

### Pack Formats Used

Global		Flexible	42%
		Tub	14%
		Tray	12%
Asia Pacific		Flexible	51%
		Tub	15%
		Jar	8%
Europe		Tray	31%
		Flexible	24%
		Carton	19%

### Top Claims Used

Global		Microwaveable	23%
		Halal	22%
		No Additives/Preservatives	20%
Asia Pacific		Halal	29%
		Time/Speed	27%
		No Additives/Preservatives	22%
Europe		Microwaveable	32%
		Ethical - Environmentally Friendly Package	31%
		Ease of Use	25%

Only regions with n >30 are displayed



# Innovative Spring Onion Launches: L3M (December 2015 – April 2016)

## AH Mie Goreng (Netherlands)

AH Mihoen Goreng (Mie Goreng) has been relaunched with a new recipe and packaging. This microwaveable meal comprises rice noodles, eggs, leek, ham and pork, and contains no milk. It retails in a 450g pack.



**Claims:**  
Microwaveable, Low/No/Reduced Allergen

## John West Tuna Pieces with an Oven Dried Tomato & Herb Dressing (South Africa)

John West Tuna Pieces with an Oven Dried Tomato & Herb Dressing has been repackaged with an updated design. These light meat tuna pieces with a twist are said to be a delicious sandwich filler, can be served with a fresh green salad or on a baked potato for a more substantial meal. The dolphin friendly product retails in an 85g pack.



**Claims:**  
Ethical - Animal

## Hai Shen Spring Onion and Ginger Cooking Wine (China)

Hai Shen Cong Jiang Liao Jiu (Spring Onion and Ginger Cooking Wine) is brewed according to a special technique. This product has a rich spring onion and ginger taste, and retails in a 500ml pack.



**Claims:**  
N/A

## Xrisi Zimi Homemade Lenten Vegetable Pie (Greece)

Xrisi Zimi / Golden Pastry Spitiki Chortopita Nistisimi (Homemade Lenten Vegetable Pie) is made with spinach, endive, leek, spring onion and extra virgin olive oil. This product contains no preservatives and retails in an easy-to-open 850g pack, featuring a QR code.



**Claims:**  
No Additives/Preservatives, Seasonal, Ease of Use, Convenient Packaging



# Innovative Spring Onion Launches: L3M (December 2015 – April 2016)

## Dolmio Alfredo Pasta Sauce (Indonesia)

Dolmio Saus Pasta Alfredo (Alfredo Pasta Sauce) is free from artificial colourings, flavours, and preservatives. The product is said to be delicious and creamy, and is made with great tasting ingredients. It retails in a 490g recyclable pack featuring easy cooking instructions.



**Claims:**  
No Additives/Preservatives, Ethical - Environmentally Friendly Package, Ease of Use

## Nissin Cup Noodles Kyushu White Flavour Instant Noodle (Malaysia)

Nissin Cup Noodles Kyushu White Flavour Instant Noodle is now available. The product is ready in three minutes. The manufacturer states to be the global noodle partner of Manchester United and the product retails in a 75g pack featuring a Facebook logo.



**Claims:**  
Time/Speed, Social Media

## Qualycord Mutton Burger (Brazil)

Qualycord Hamburger de Cordeiro (Mutton Burger) has been repackaged. The product is free from gluten, has been inspected by the Brazilian Ministry of Agriculture, and retails in a 540g pack containing six units, and featuring the Facebook link.



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

## Hav'eat Beef, Spring Onion & Garlic Spice Oil (South Korea)

Hav'eat Beef, Spring Onion & Garlic Spice Oil is made with stir-fried beef, domestic spring onion for a unique flavour. This product can be used for a variety of dishes in place of the cooking oil to add a savoury taste. It retails in a 250ml pack bearing the HACCP logo.



**Claims:**  
N/A



# Innovative Spring Onion Launches: L3M (December 2015 – April 2016)

## The Co-operative Loved By Us Vegetable Spring Rolls (UK)

The Co-operative Loved By Us Vegetable Spring Rolls comprise crispy golden pastry rolls filled with vegetables, plum sauce and seasoned with five spice. The vegan and vegetarian friendly product is low in saturated fat and retails in a 200g partially recyclable pack containing four units.



**Claims:**  
Vegetarian, Ethical - Environmentally Friendly Package, Vegan, No Animal Ingredients, Low/No/Reduced Saturated Fat

## KaWang Taizhiwei Five-Spice Flavoured Beef in Master Stock (China)

KaWang Taizhiwei Wu Xiang Wei Lu Zhi Niu Rou (Five-Spice Flavoured Beef in Master Stock) is made with free-range cattle and baked with honey. This Taiwanese style product is said to be fresh and chewy, and retails in an 80g pack containing individual units.



**Claims:**  
Ethical - Animal

## Maggi Nutri-licious Pazzta Mushroom Penne Pasta (India)

Maggi Nutri-licious Pazzta Mushroom Penne Pasta has been repackaged and retails in a newly designed 64g pack. The vegetarian product is made from 100% semolina and can be prepared in just five minutes.



**Claims:**  
Vegetarian, Time/Speed

## YoCAM Meat, Vegetable and Spring Onion Flavoured French Style Salty Cake (China)

YoCAM Rou Shu Cong Xiang Wei Fa Shi Si Fang Xian Dan Gao (Meat, Vegetable and Spring Onion Flavoured French Style Salty Cake) features a salty taste, and is suitable for travelling. This product retails in a 518g pack containing individually wrapped units and featuring a QR code.



**Claims:**  
On-the-Go





# Australian Spring Onion Launches: L3M (December 2015 – April 2016)

## Smile Foods Classic Pork Buns

Smile Foods Classic Pork Buns are claimed to feature a 100% authentic taste. This product can be steamed or microwaved, and retails in a 310g pack containing four buns.



**Claims:**  
Microwaveable

## Woolworths Select Vegetable Spring Rolls with Sesame Seeds

Woolworths Select Vegetable Spring Rolls with Sesame Seeds come with a sweet chilli dipping sauce and contain no artificial preservatives, colours, flavours or added MSG. The product retails in a 350g recyclable pack containing 12 spring rolls.



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

## Hart & Soul All Natural Hot Korean Soup

Hart & Soul All Natural Hot Korean Soup is a traditional Korean kimchi style soup with cabbage, tofu and chicken. This 100% natural product is dairy- and GMO-free and contains no artificial colours, flavours or preservatives. This product retails in an 85g pack featuring the Facebook and Instagram logos.



**Claims:**  
No Additives/Preservatives, All Natural Product, Low/No/Reduced Allergen, GMO-Free, Social Media



Radish.





On average, radish is purchased around four times a month, and is consumed ten times per month.

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

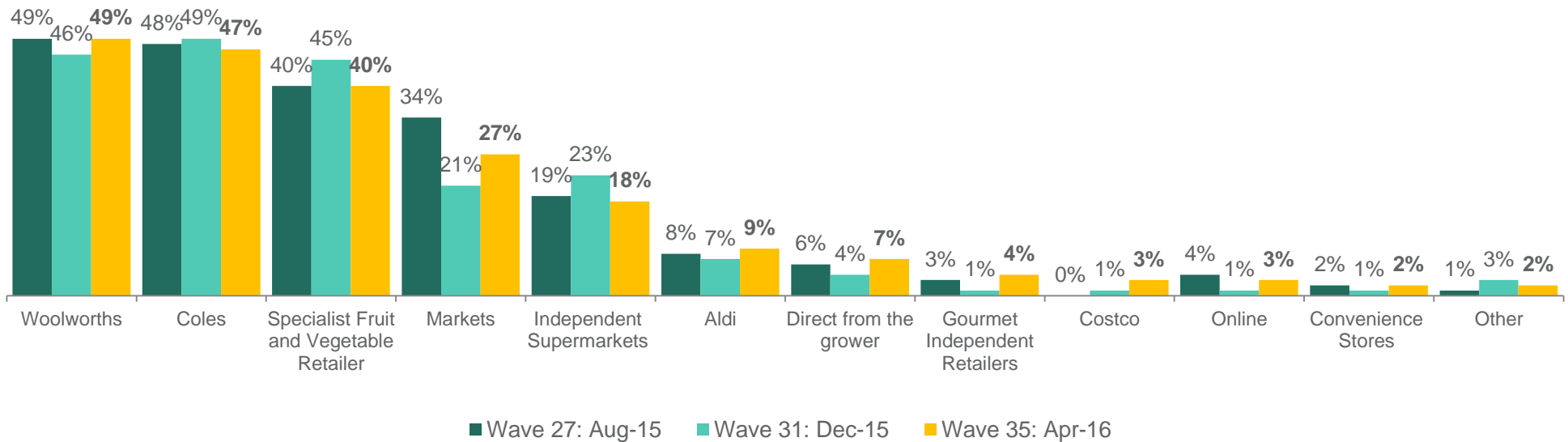


3.9 times, Wave 27  
3.2 times, Wave 31



9.2 times, Wave 27  
9.4 times, Wave 31

### Purchase Channels



Q1. On average, how often do you purchase Radish?  
Q2. On average, how often do you consume Radish?  
Q5. From which of the following channels do you typically purchase Radish?  
Sample Wave 27 N=203, Wave 31 N=202, Wave 35 N=202



# Average Spend and Price Sensitivity



Average weight of purchase

The average consumer typically purchases **600g** of radish, relatively consistent with the previous waves.

- 600g, Wave 27
- ▼ 500g, Wave 31



Recalled last spend

Recalled last spend on radish was **\$3.30**, which is higher than in December 2015.

- ▲ \$3.40, Wave 27
- ▼ \$3.00, Wave 31



Value for money

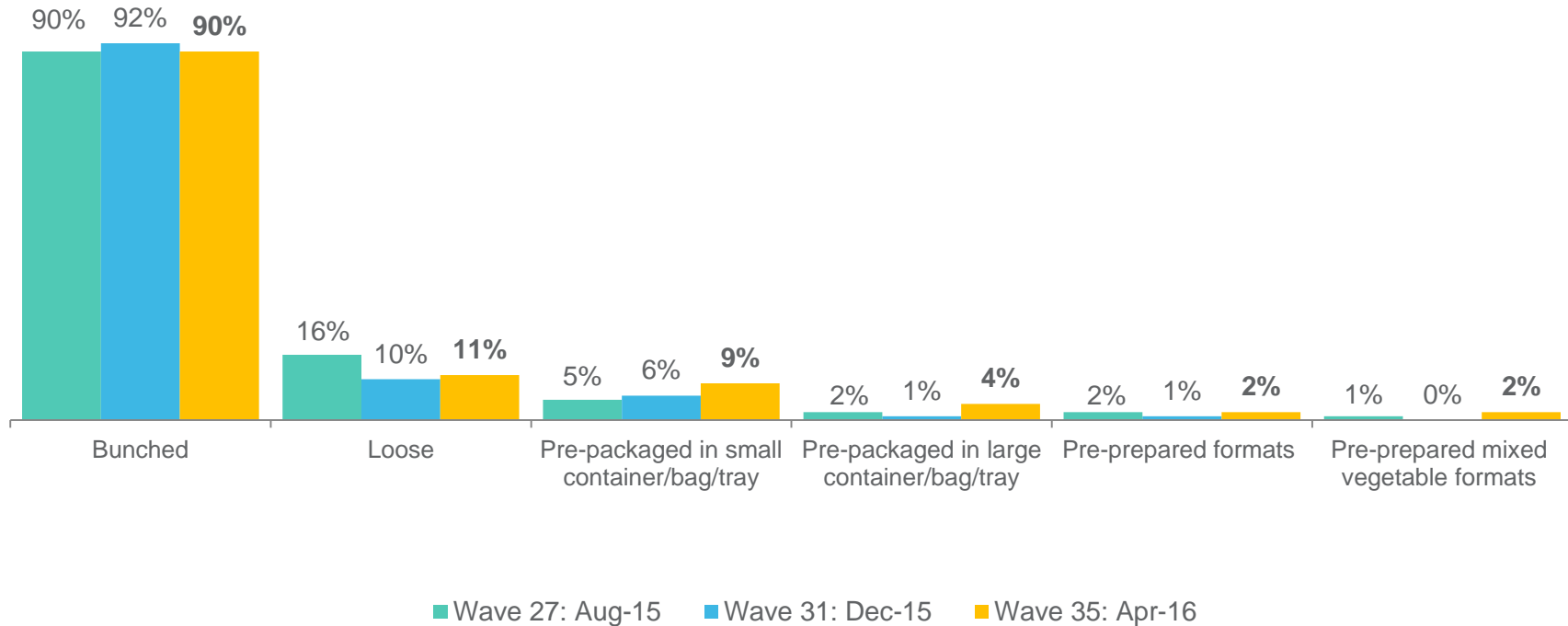
Consumers' perceived value for money is fair for radish (**6.3/10**), consistent with past waves.

- 6.3/10, Wave 27
- 6.3/10, Wave 31

Q3. How much Radish do you typically purchase when you shop for it?  
 Q3b. To the best of your memory how much did this cost on your most recent typically purchase?  
 Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)  
 Sample Wave 27 N=203, Wave 31 N=202, Wave 35 N=202



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

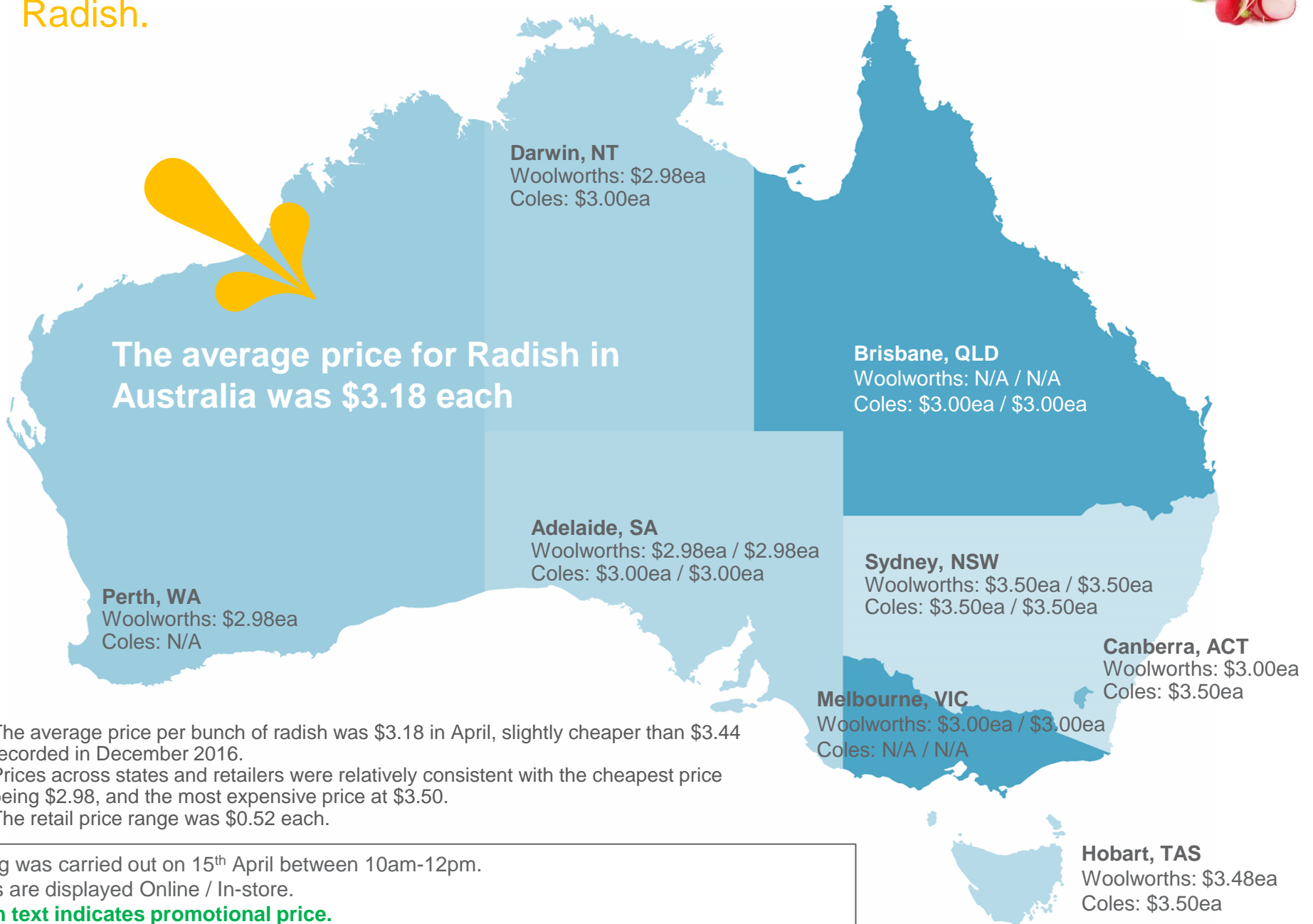


Q4b In what fresh formats do you typically purchase Radish?  
Sample Wave 27 N=203, Wave 31 N=202, Wave 35 N=202



# Online and In-store Commodity Prices.

## Radish.

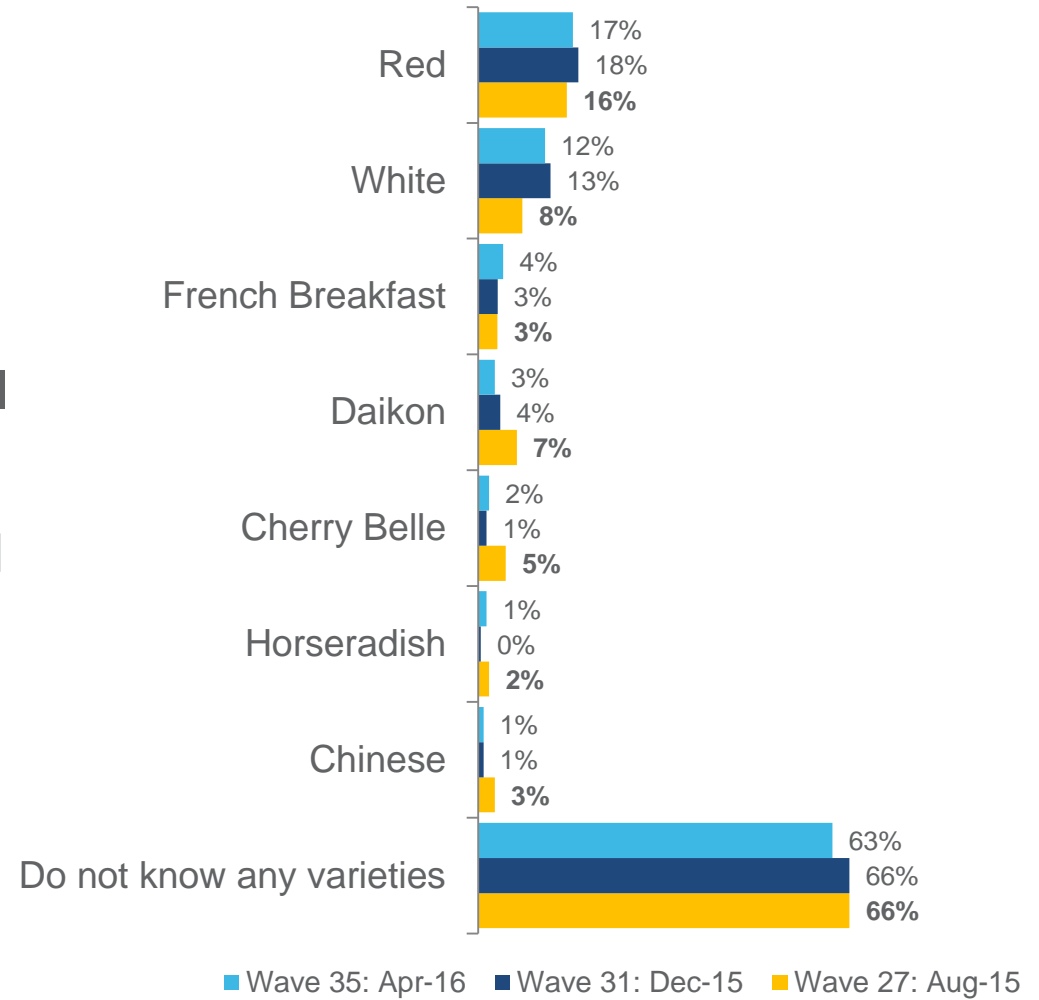


Pricing was carried out on 15<sup>th</sup> April between 10am-12pm.  
 Prices are displayed Online / In-store.  
**Green text indicates promotional price.**



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

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

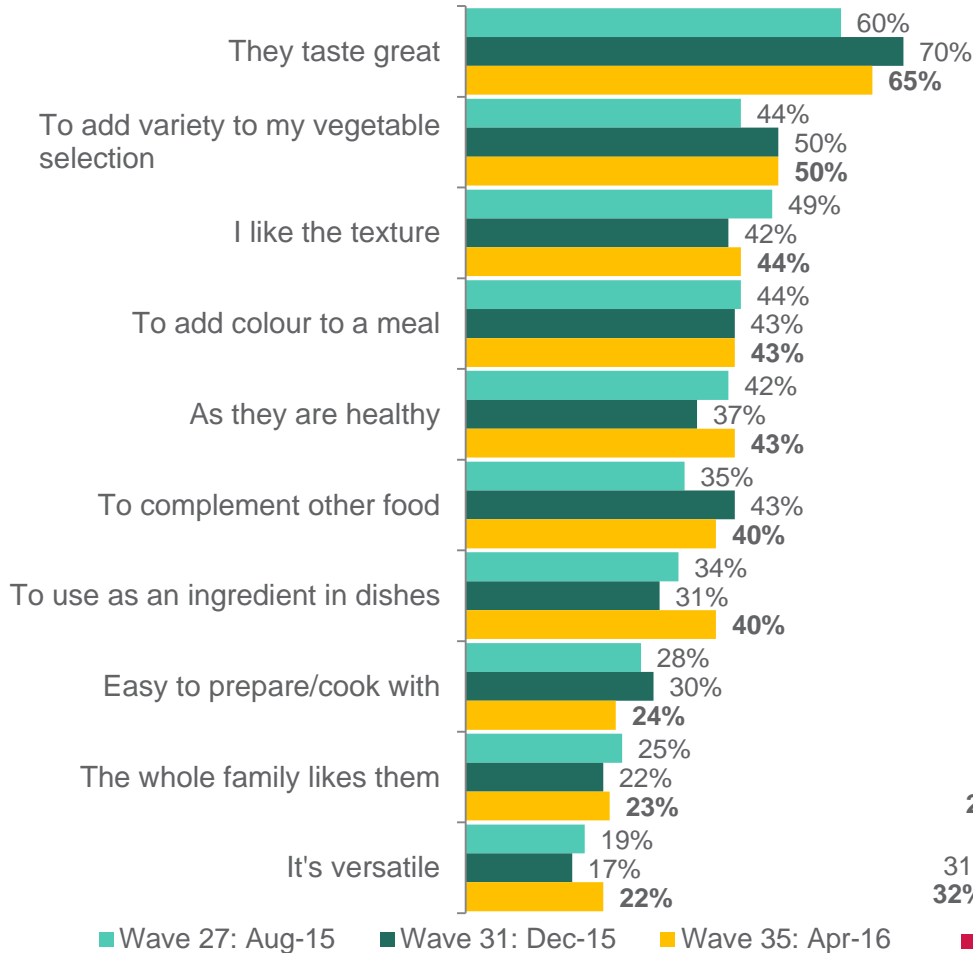




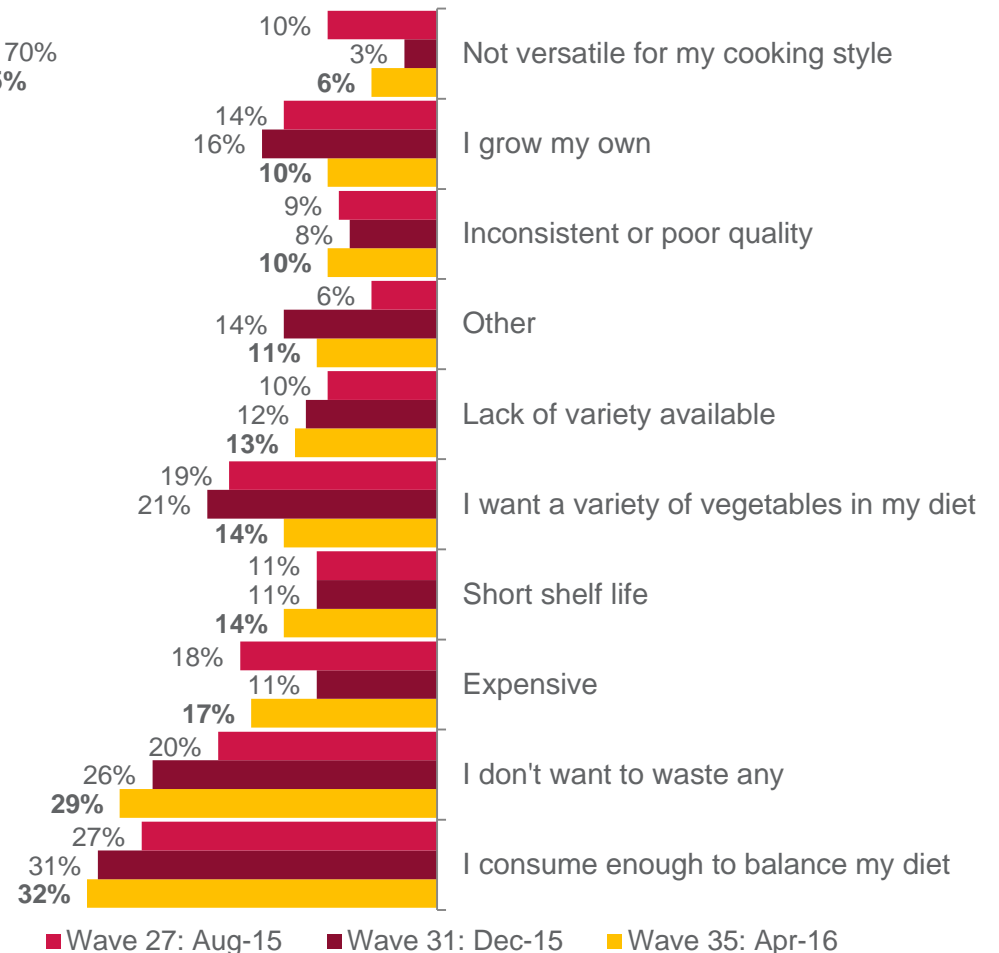


Taste, variety and texture are the key drivers of purchase. Barriers to purchase are already consuming enough, not wanting to waste any and price.

### Triggers



### Barriers



Q7. Which of the following reasons best describes why you purchase Radish?  
 Q8. Which reason best describes why you don't buy Radish more often?  
 Sample Wave 27 N=203, Wave 31 N=202, Wave 35 N=202



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

Meal occasions tend to occur during dinner and lunch. Radish also appears to be popular as a quick meal or snack.

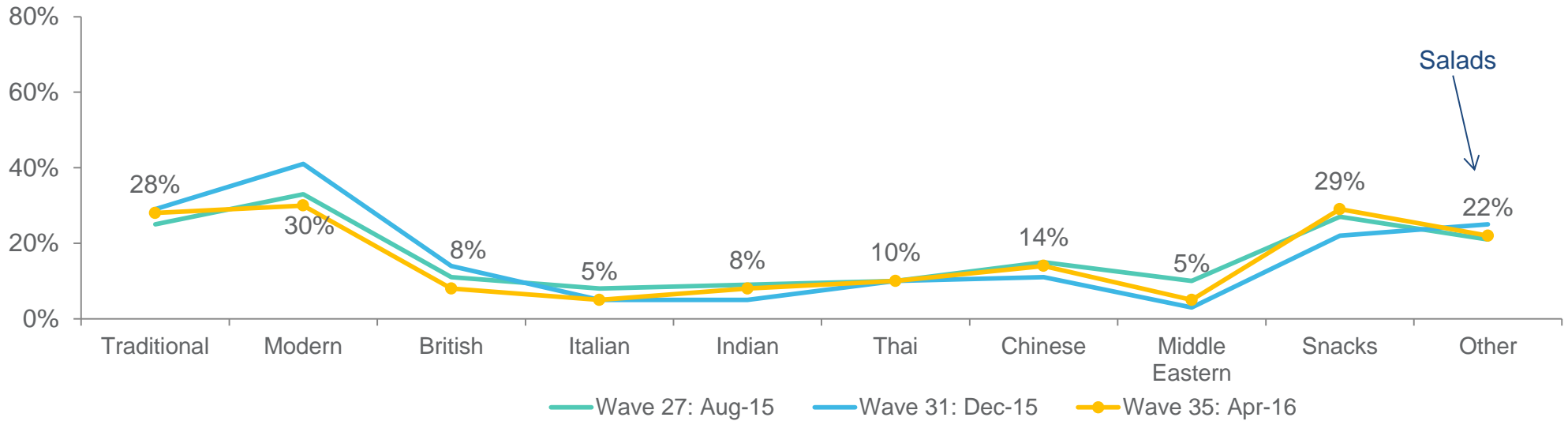
### Top 5 Consumption Occasions

	Wave 31	Wave 35
Dinner	50%	48%
Lunch	50%	47%
Quick Meals	33%	37%
Family Meals	39%	35%
Snacks at home	27%	32%

**15%**  
used radish when cooking a new recipe

▼ 8%, Wave 31

### Typical Cuisine Cooked



Salads

← Australian → ← European → ← Asian → ← Other Cuisines →

Q10. What cuisines do you cook/consume that use Radish?  
Q11. Which of the following occasions do you typically consume/use Radish?  
Sample Wave 27 N=203, Wave 31 N=202, Wave 35 N=202

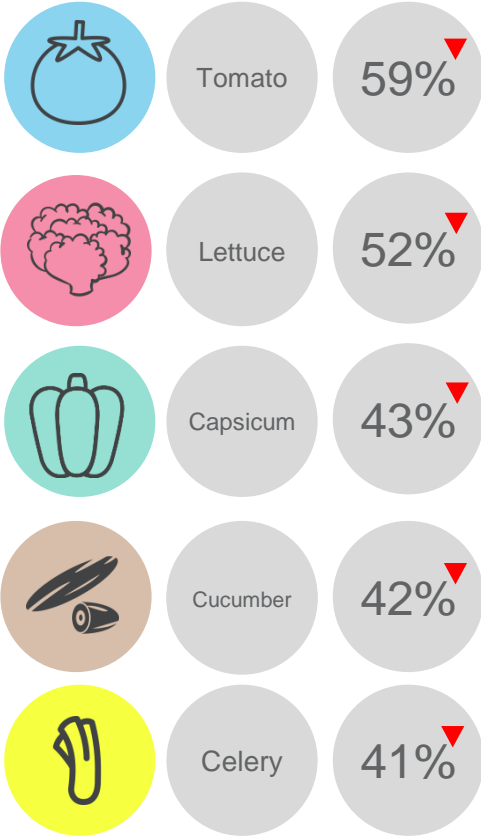


▼: Indicates LOWER score than current wave.  
▲: Indicates HIGHER score than current wave.



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

### Accompanying Vegetables



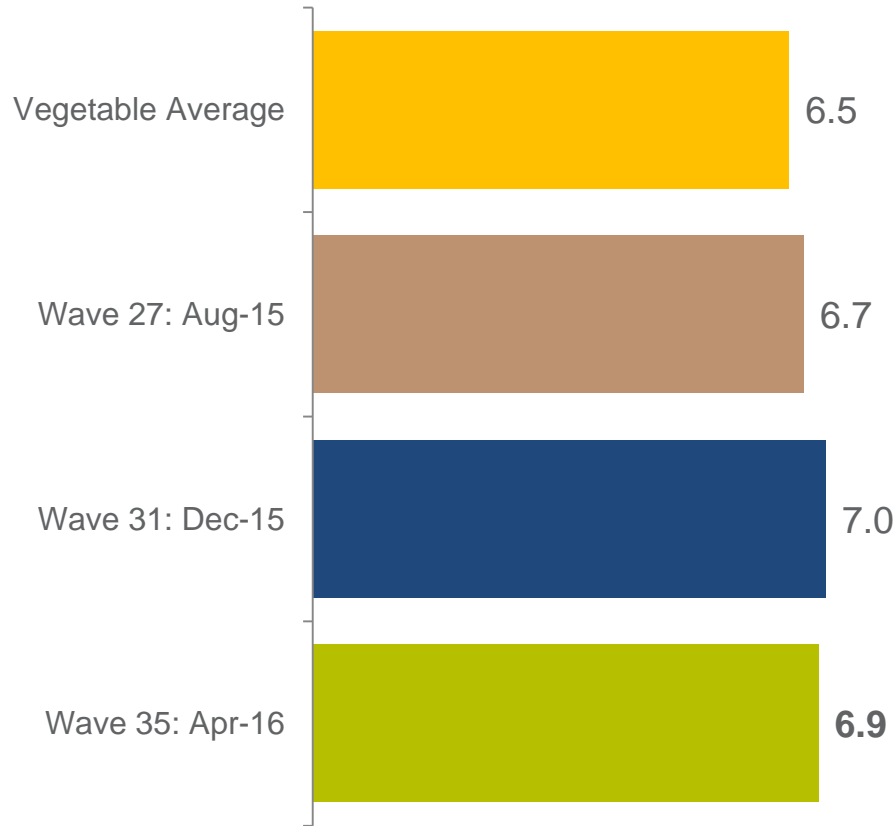
### Top Cooking Styles

	Wave 27	Wave 31	Wave 35
Raw	80%	80%	<b>81%</b>
Stir frying	20%	13%	<b>20%</b>
Soup	13%	8%	<b>11%</b>
Other	11%	12%	<b>11%</b>
Roasting	5%	4%	<b>6%</b>
Slow Cooking	7%	2%	<b>6%</b>
Sautéing	3%	6%	<b>6%</b>
Frying	6%	2%	<b>5%</b>
Baking	2%	3%	<b>4%</b>
Fermenting	4%	1%	<b>4%</b>

Q9. How do you typically cook Radish?  
Q10a. And when are you serving Radish which of the following do you also serve together with this?  
Sample Wave 27 N=203, Wave 31 N=202, Wave 35 N=202



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



Q14. When purchasing Radish, how important is Provenance to you?  
Q15. And when purchasing Radish, how important is that it is grown in Australia?  
Sample Wave 27 N=203, Wave 31 N=202, Wave 35 N=202

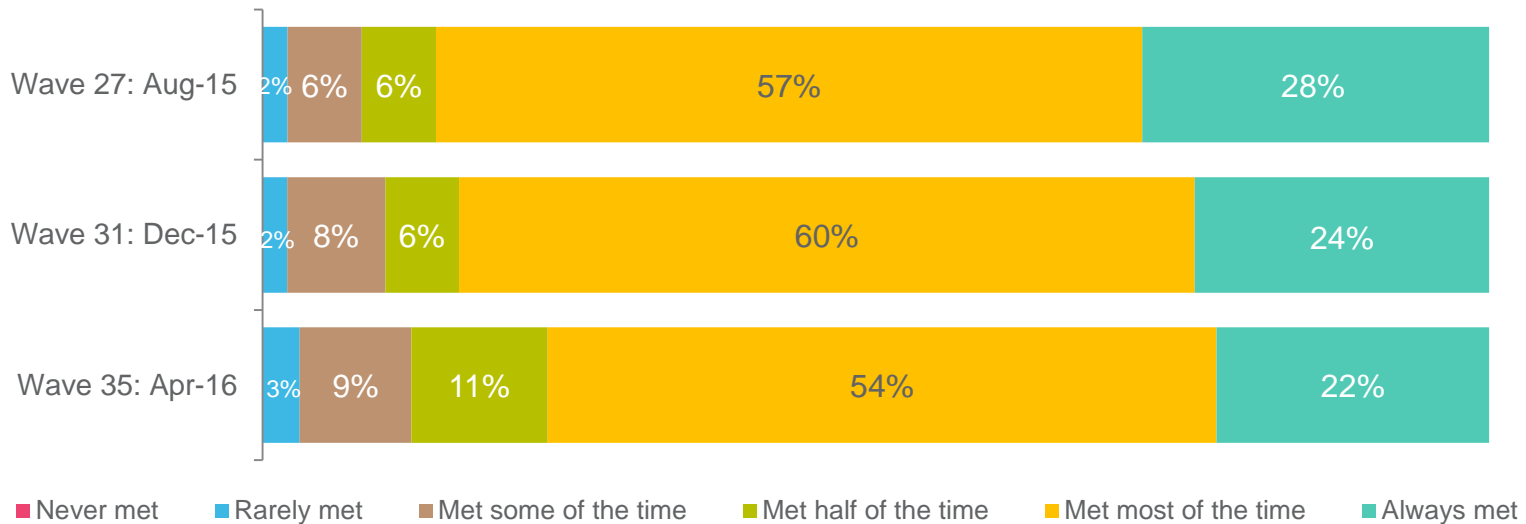


Consumers expect radishes to remain fresh for approximately nine days once purchased, which has consistently increased over the last three waves. Yet, expectations of freshness being met is declining, and being met less often.

Expected to stay fresh for **8.8 days**

- ▼ 7.9 days, Wave 27
- ▼ 8.4 days, Wave 31

### Expectations Met



Q12. How long do you expect Radish to stay fresh for, once you have purchased it?  
 Q13. How often is this length of freshness met when you buy Radish?  
 Sample Wave 27 N=203, Wave 31 N=202, Wave 35 N=202

A close-up photograph of several bright red radishes with green leafy tops, resting on a light-colored surface. A large, dark grey circle is overlaid on the center of the image, containing the title text.

# Radish Product Launch Trends.

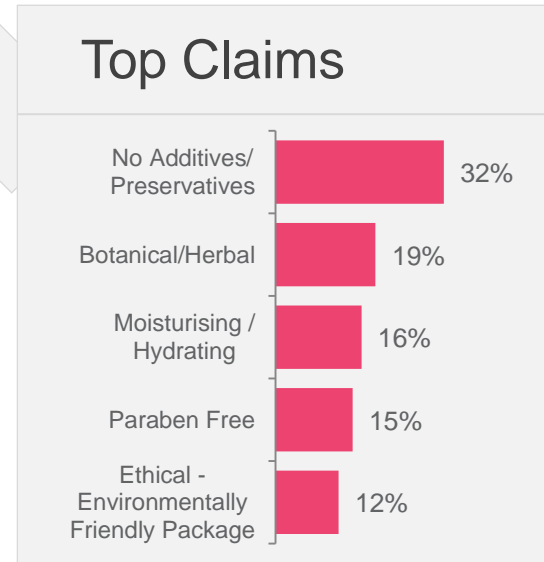
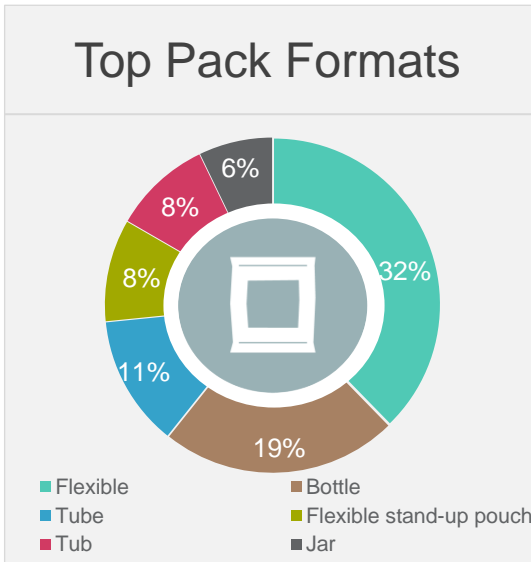
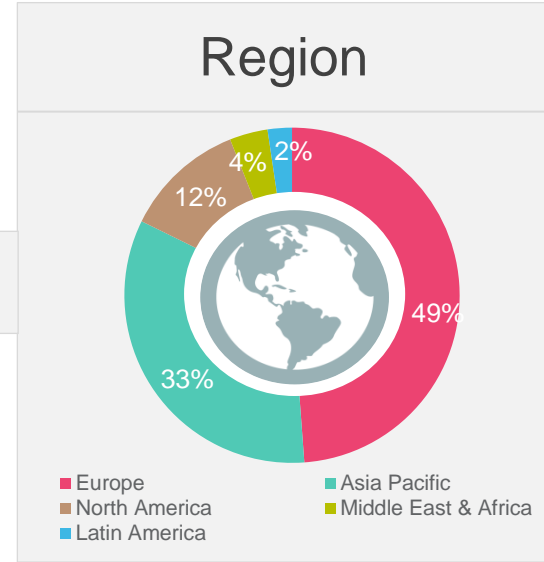
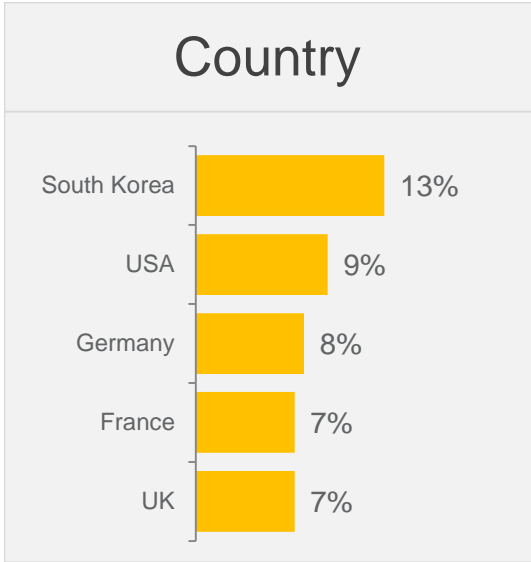
# Radish Global Launches

December 2015 – April 2016

There were 299 radish products launched globally over the last three months. The majority of launches were in South Korea and USA. Categories for launches were sugar & gum confectionery, and skincare. Key packaging for radish products were flexible formats.



299 Global NPDs







## Radish Product Launches: Last 3 Months (December 2015 – April 2016) Summary

- There were 299 launches in the past 3 months globally that contained radish as an ingredient.
- There was one product launched in Australia over the past three months.
- Europe (49%) and Asia Pacific (33%) were the key regions for launches.
- Flexible packaging (32%), bottles (19%) and tubes (11%) were the most common format used for products.
- The main categories for launches were sugar and gum confectionery (16%), skincare (14%) and sauces & seasonings (10%).
- Claims used on products were no additives/preservatives (32%), botanical/herbal (19%), and moisturising/hydrating (16%).
- The most innovative product launched was a Soybean Paste Soup with Dried Radish Leaves from South Korea. Examples of other innovative launches can be found in the following pages.



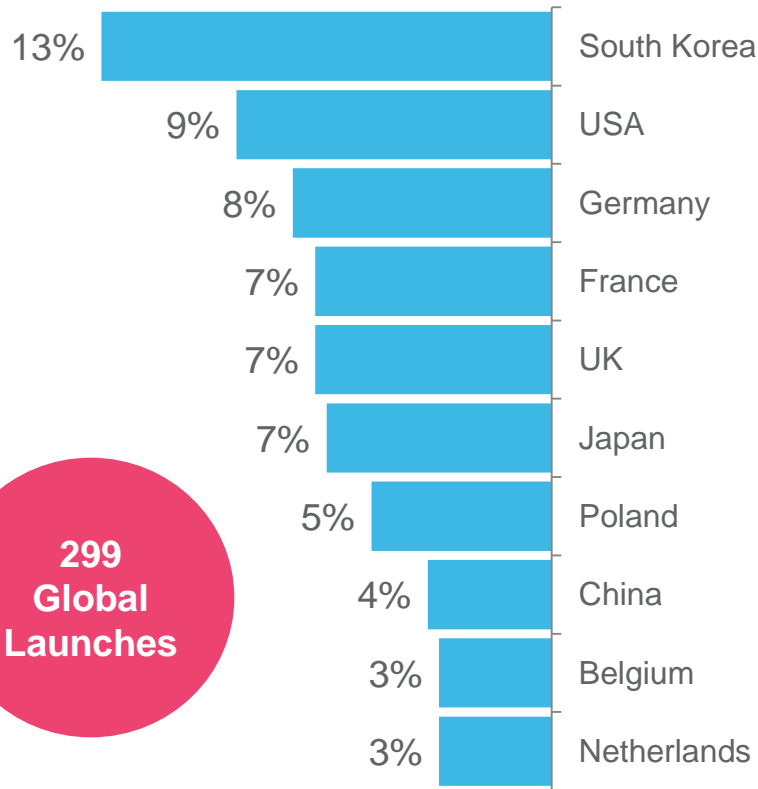
Source: Mintel (2016)



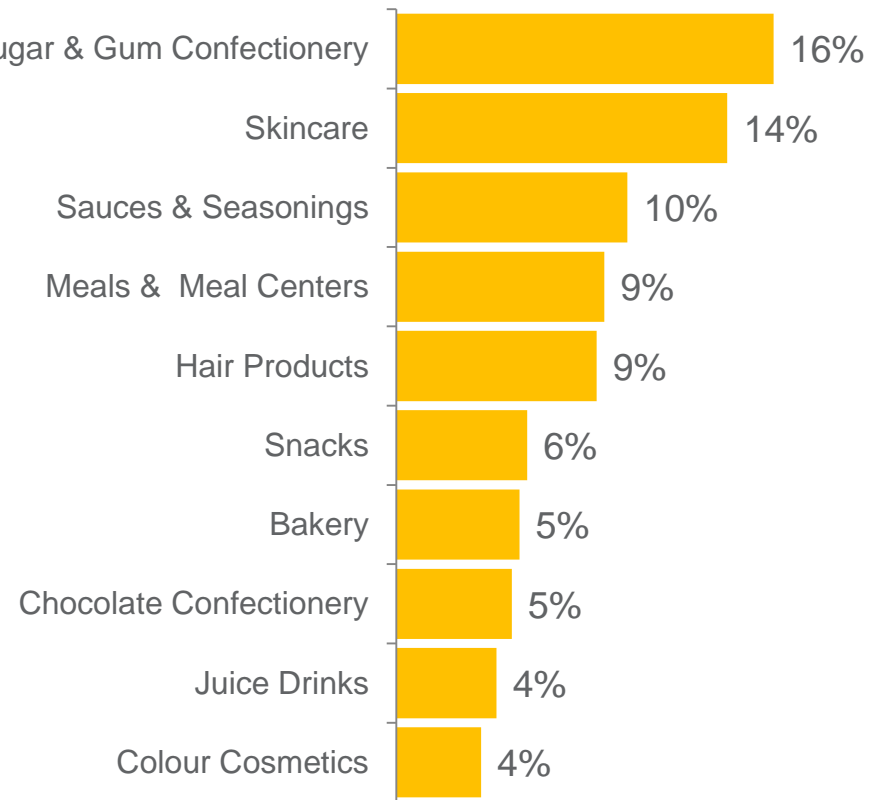
The majority of launches occurred in South Korea, USA and Germany.

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

Top Launch Countries



Top Launch Categories












**299  
Global  
Launches**












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

### Pack Formats Used

Global		Flexible	32%
		Bottle	19%
		Tube	11%
Europe		Flexible	35%
		Bottle	21%
		Tube	10%
Asia Pacific		Flexible	35%
		Bottle	21%
		Tube	10%

### Top Claims Used

Global		No Additives/Preservatives	32%
		Botanical/Herbal	19%
		Moisturising / Hydrating	16%
Europe		No Additives/Preservatives	25%
		Botanical/Herbal	18%
		Seasonal	16%
Asia Pacific		No Additives/Preservatives	43%
		Ethical - Charity	15%
		Microwaveable	14%

Only regions with n >30 are displayed

# ➤➤➤ Innovative Radish Launches: L3M (December 2015 – April 2016)

## Chongga Food Soybean Paste Soup with Dried Radish Leaves (South Korea)

Chongga Food Soybean Paste Soup with Dried Radish Leaves is made with domestic dried radish leaves and soybean paste, added fermented vegetable lactobacillus liquid ENT. The microwaveable product is free from artificial flavours and synthetic sweeteners. It retails in a 300g pack with one serving.



**Claims:**  
No Additives/Preservatives, Microwaveable

## Eco by Sonia Driver Foaming Body Wash (USA)

Eco by Sonia Driver Foaming Body Wash is formulated with certified organic and natural ingredients, lemongrass and pink grapefruit, claimed to cleanse and hydrate the skin. The product has a revitalizing, rejuvenating and refreshing gentle formula suitable for the whole family, and comes with an incredibly uplifting aroma.



**Claims:**  
Organic, Aromatherapy, Botanical/Herbal, Moisturising / Hydrating, Vegan, No Animal Ingredients, Sulphate/Sulfate Free

## Dimmidisì L'Altro Contorno Mixture of Delicate & Spicy Vegetables (Italy)

Dimmidisì L'Altro Contorno Ricetta Amabil & Piccante (Mixture of Delicate & Spicy Vegetables) contain corn and rocket salad and can be eaten raw or cooked. This product retails in a 200g recyclable pack bearing the Facebook, Pinterest and YouTube logos.



**Claims:**  
Ethical - Environmentally Friendly Package, Social Media

## Trader Joe's Sriracha Tuna Salad (USA)

Trader Joe's Sriracha Tuna Salad contains light tuna, carrot, daikon radish, green onion, jalapeño and cilantro tossed in a creamy sriracha sauce. The perishable product retails in an 8-oz. pack.



**Claims:**  
N/A

# »»» Innovative Radish Launches: L3M (December 2015 – April 2016)

## Yorihada Kimchi Filled Big Dumplings (South Korea)

Yorihada Kimchi Filled Big Dumplings are filled with deliciously aged kimchi and domestic pork, wrapped in a thin and chewy dumpling dough. This product retails in a pack containing two 420g packets and bearing the HACCP logo.



**Claims:**  
Convenient Packaging

## Good GN Grilled Chicken (South Korea)

Good GN Grilled Chicken is made with 100% domestic chicken and has a chewy texture. It is said to be an ideal snack or accompaniment to beer for camping or baseball ground. This microwaveable and HACCP certified product is ready in four minutes and retails in a 600g pack including 160g radish pickle and 2 x 12g honey mustard sauce sachets.



**Claims:**  
Microwaveable

## Haribo I Love Tagada Gums Assortment (France)

Haribo I Love Tagada Confiserie Assortie Gélifiée Fantaisie (Gums Assortment) has been repackaged in a 540g pack containing mini packets of Tagada L'Originale with natural colourings; sour Tagada Pink; Tagada Purple gums; and a free tattoo book. This limited edition product retails in a newly designed pack featuring the Facebook logo and a QR code.



**Claims:**  
Children (5-12), Limited Edition, Social Media

## Kagome Yasai Seikatsu 100 Peel & Herb Lemon & Lemongrass Mix Juice (Japan)

Kagome Yasai Seikatsu 100 Peel & Herb Lemon & Lemongrass Mix Juice is now available. It is made with 14 vegetables, three fruit and two herbs, and features 80mg vitamin C and 930mg citric acid. It has a 50% vegetable juice content and a 50% fruit juice content, and is said to be refreshing and aromatic. This product retails in a 200ml pack. Launched on March 1, 2016 with an RRP of 108 yen.



**Claims:**  
N/A

# ➤➤➤ Innovative Radish Launches: L3M (December 2015 – April 2016)

## Kagome Yasai Seikatsu 100 Energy Roots Juice (Japan)

Kagome Yasai Seikatsu 100 Energy Roots Juice has been relaunched. It is made with 18 vegetables and 10 fruits with 120g vegetables per 180ml, which is equivalent to 1/3 of the daily recommended amount. The product comprises 65% fruit juice and 35% vegetable juice and features polyphenols for beauty benefits. It is free from added sugar, salt and preservatives. The product retails in a 720ml recyclable smart bottle. Launched on February 16th 2016 with an RRP of 259 yen.



**Claims:**  
No Additives/Preservatives, Low/No/Reduced Sugar, Low/No/Reduced Sodium, Beauty Benefits, Ethical - Environmentally Friendly Package

## Pulmuone Saenggadeuk Wild Herbs and Vegetables Bibimbap (South Korea)

Pulmuone Saenggadeuk Wild Herbs and Vegetables Bibimbap consists of two packets of rice, two packets of red chilli sauce and two packets of sesame oil. The rice is cooked in a way of cooking using an iron pot and added five fresh domestic herbs including just picked canola leaves, chwinamul, that still holds its fragrant scent and a soft texture, bellflower root, chamnamul and dried radish leaves to provide a delicious taste and nutrients.



**Claims:**  
No Additives/Preservatives, Microwaveable, Ethical - Charity

## Hitschler XXL Sour Fruit Gum Strips (Germany)

Hitschler XXL Bunte Drachenzungen (XXL Sour Fruit Gum Strips) are now available. This limited edition product features four flavours: cherry; peach; apple; and strawberry. The 100% vegetarian product retails in a 145g pack containing 16% free.



**Claims:**  
Vegetarian, Limited Edition

## Zhendelao Pao Cai Fang Vegetables for Jia Mo Bun (China)

Zhendelao Pao Cai Fang Jia Mo Cai (Vegetables for Jia Mo Bun) are QS certified. This product retails in a 120g pack.



**Claims:**  
N/A



# Australian Radish Launches: L3M (December 2015 – April 2016)

## Hart & Soul All Natural Hot Korean Soup

Hart & Soul All Natural Hot Korean Soup is a traditional Korean kimchi style soup with cabbage, tofu and chicken. This 100% natural product is dairy- and GMO-free and contains no artificial colours, flavours or preservatives. This product retails in an 85g pack featuring the Facebook and Instagram logos.



### Claims:

No Additives/Preservatives, All Natural Product, Low/No/Reduced Allergen, GMO-Free, Social Media





In the Media.





# General Vegetable News (February – April 2016)

- New cutting-edge technology embedded into trolleys could, in the not-to-distant future, give Australian shoppers priceless fruit and vegetable information such as harvest time and freshness.
- AUSVEG stated that high-tech smartphone and touchscreen products built into trolleys were being used overseas to “display product information and help shoppers find products in-store”. These “technological innovations could be brought to Australian stores to assist consumers and respond to Australian shoppers’ increasing demand for information about their purchases”.
- This technology would help show Australian shoppers exactly when a crop was picked and how long it would stay fresh, if stored properly.

Source: [www.huffingtonpost.com.au](http://www.huffingtonpost.com.au)





# Commodity News

## (February – April 2016)



- Many studies have suggested that increasing our consumption of plant foods, such as cabbage, can promote improved health outcomes such as better energy, assisting with weight management and providing many key vitamins and minerals.
- Cabbage is a good source of sulphur, vitamin C, manganese and antioxidants. The vegetable is highly versatile and can be used raw or cooked in a number of ways.

<http://www.stuff.co.nz>



- Australian celery exports have risen by more than 172 per cent in three years, according to data obtained by AUSVEG.
- AUSVEG Economist Andrew Krupp said that the rise in the value of celery exports could be partly attributed to the weaker Australian dollar that made imports of the Australian vegetable commodity more attractive to overseas buyers, as well as increased interest in key export markets.
- Projections published recently by ABARES show overall vegetable exports will continue to grow by a further \$126 million until 2020-21.

<http://www.weeklytimesnow.com.au>



- The Wild Cucumber has been a forgotten type of cucumber for years. But this strain has now been further developed and can serve the market again, which is now being cultivated on a large scale.
- The characteristics of this strain include its distinctive taste, crocodile-like skin and dark green colour. The vegetable flesh of the Wild Cucumber is substantial and tasty, even when stir-fried.
- Wild Cucumbers have been cultivated in the Netherlands and Spain.

<http://www.freshplaza.com/>



- Nim's has recently launched a new line of air-dried vegetable chips. This snack is 100% natural and tastes like the original vegetables. Nim's is the only brand in the UK which produces and markets these chips.
- Three varieties are available including pepper-courgette, tomato-cucumber, and beet-parsnip. The innovative product targets health-conscious consumers, with sweet and savoury flavours both available.

<http://www.freshplaza.com/>

# Commodity News

## (February – April 2016)



- Scientists from the Indian Council for Agricultural Research (ICAR) have discovered a new viral disease in eggplant crops in a small village in India.
- The disease, called tomato leaf curl virus (begomovirus) is said to be transmitted by cotton whitefly. The whitefly is a sap-sucking insect which may have spread the disease which would paralyse the plants, thus wiping out any yield. The plants will stunt in growth, with new leaves greatly reducing in size, before curling downwards.

<http://www.freshplaza.com>



- A lawyer who allegedly slipped and fell on a spring onion while shopping at Woolworths has sued the supermarket giant for damages.
- Court documents did not reveal what injuries Olga Day sustained or how much compensation she was seeking. Ms Day, who is a qualified lawyer in Russia, represented herself in the proceedings.
- Judge Clare Kingham, in handing down her decision this month, dismissed large parts of Ms Day's application but ordered Woolworths to provide certain information she had requested.

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



- The watermelon radish remains a relatively unknown vegetable. It is a root vegetable related to the Chinese Daikon radish and can be eaten whole, skin and all.
- Although smaller than a watermelon, it can grow to the size of a softball. The radish is crunchy when eaten raw, but can also be cooked. It is milder than most radishes.
- The skin is of a light green colour, whilst the interior is a magenta colour.

<http://www.freshplaza.com>



# Background & Methodology.





# ➤ Background & Setting the Scene.

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

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

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

This wave's report (Wave 35, April 2016) focuses on:

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

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





# Online Methodology.

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

## General Respondent Questions

Demographics

Vegetable Consumption

1/7 Commodities

## Commodity Specific Questions

Category Health

Purchase & Consumption Habits

Price Perceptions & Average Spend

Triggers/Barriers to Purchase

Preparation Preferences

+ 2 Ad hoc Questions per Month







# Sample.

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

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

To qualify for the questionnaire, respondents...

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

	Cabbage n=307	Celery n=310	Cucumber n=310	Zucchini n=308	Eggplant n=201	Spring Onion n=204	Radish n=202
<b>Gender</b>							
Male	41%	41%	39%	33%	42%	40%	50%
Female	59%	59%	61%	67%	58%	60%	50%
<b>Age</b>							
18-24 y.o.	2%	2%	2%	1%	3%	2%	1%
25-34 y.o.	5%	8%	10%	7%	17%	7%	13%
35-44 y.o.	10%	9%	12%	11%	15%	13%	14%
45-54 y.o.	15%	16%	16%	18%	21%	18%	18%
55-64 y.o.	28%	30%	31%	31%	31%	29%	26%
65+ y.o.	40%	36%	29%	33%	12%	30%	28%
<b>Household</b>							
Single Income no Kids	17%	21%	21%	19%	20%	23%	13%
Double Income no Kids	18%	17%	20%	17%	22%	21%	21%
Young Families	7%	8%	10%	9%	11%	7%	10%
Established Families	20%	17%	19%	20%	19%	22%	24%
Empty Nesters	39%	38%	30%	34%	27%	27%	32%
<b>Location</b>							
New South Wales	21%	24%	28%	25%	36%	20%	22%
Victoria	18%	20%	21%	19%	17%	22%	18%
South Australia	18%	12%	15%	15%	11%	10%	19%
Queensland	13%	15%	13%	17%	16%	23%	17%
Western Australia	17%	18%	13%	15%	12%	16%	16%
Tasmania	11%	7%	6%	6%	2%	5%	5%
Australian Capital Territory	3%	3%	3%	2%	3%	4%	2%
Northern Territory	0%	1%	1%	1%	0%	0%	0%





# Trends Research: Our Approach



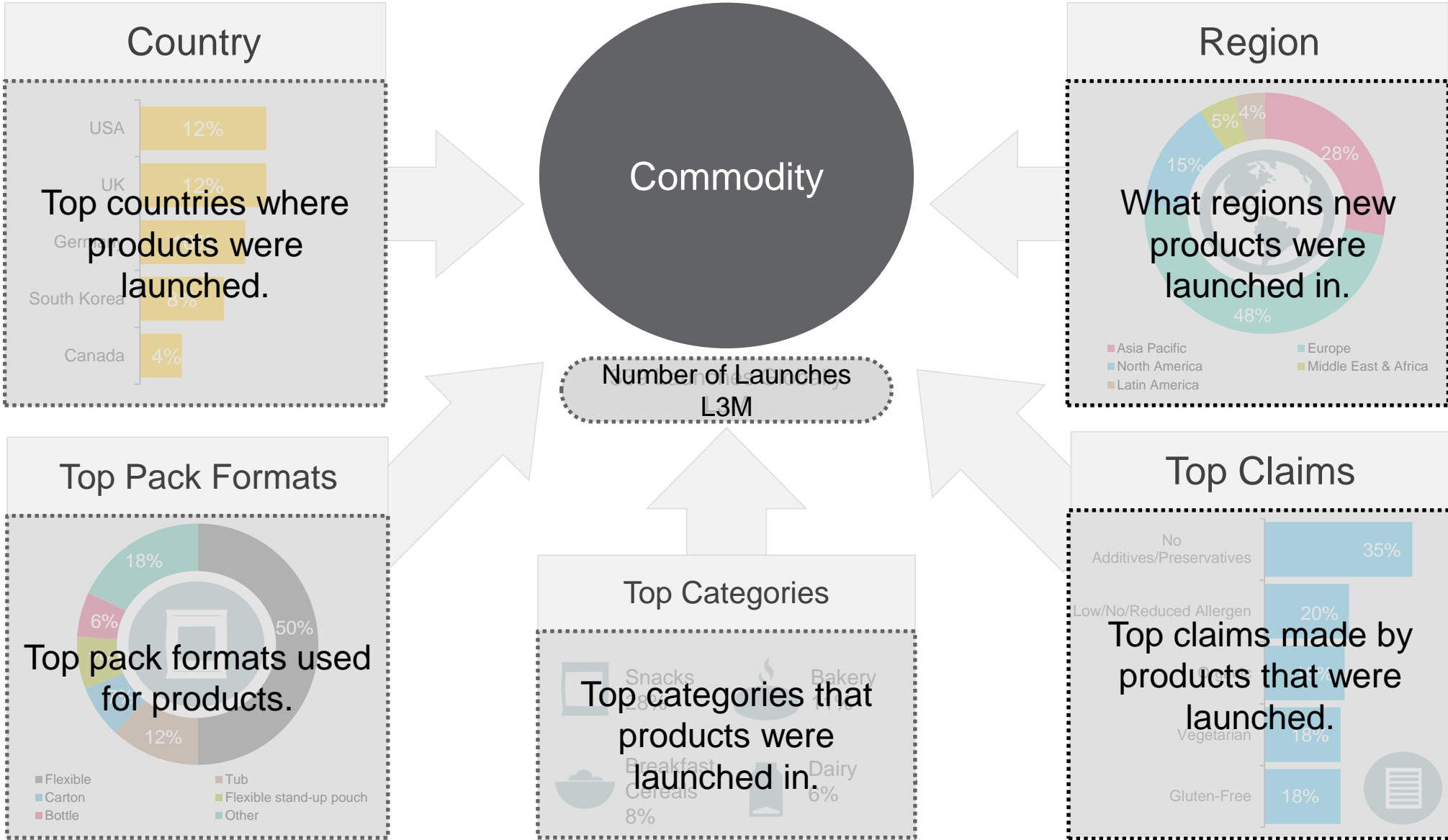
- ▶ Colmar Brunton has used a combination of both desk research and in the field of market research to explore the trends of each vegetable commodity being tracked this month.
- ▶ Our main source of secondary data for this report was collected from Mintel Global New Products Database (GNPD).
- ▶ This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



# Product Launches Last 3 Months (L3M)

## How to Read Summaries

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





# Thanks.

