



Project Harvest Monthly Tracker Report.

Wave 36, May 2016

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

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

**Horticulture
Innovation**
Australia



colmar brunton.



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Wave 36: Executive Summary

Industry Insight.

Recently, wine producer Brancott Estate held an ANZ-based innovation challenge for pioneers, inventors, wine enthusiasts and anyone with a great idea to revolutionise the wine experience. A number of awe-inspiring innovations were revealed such as **The Vino Cap** that lets you alter the flavour profile of your wine or reduce preservatives with the push of a button; the **BYO Vine Guide** which allows you to customise your vineyard experience using personal wine preferences & real winery ratings, the **Sipple** app and stopper that combine to tell you when to drink your open wine, the **WineMinder** that creates the optimal conditions for your wines wherever they're stored, and **Your Own Wine Adventure** that creates your perfect tasting with a customised selection of wines and guides delivered straight to your doorstep.

These are examples of the many wine-based innovations we have seen over recent decades, and although vegetables may be somewhat challenged to compete with the dizzying heights of the wine industry, horticulture may be able to borrow apply some of viticulture's ideas. Here are some of the wine industry's innovation and possible translations for Australian Agriculture. Consider these as you sip on your preferred tipple....

Industry Insight continued.

Winery tours and tastings, member newsletters, member only deals for the best produce and adopting vines...

Continue opening discrete parts of your farm up to the public for family-friendly days out and create special deals and “cream of the crop” deliveries for VIPs



Modern labels, celebrity tribute packaging and celebrity endorsement to attract younger consumers and bring them into the brand.

Consider celebrity endorsement for a commodity and featuring this via labelling



New formats such as cans, piccolos, sealed glasses and tetra packs for increased usage occasions

Consider new formats for vegetables that enable on-the-go and out of home consumption



Industry Insight continued.

Apps, packs and storage solutions such as the single bottle wine cellar

Consider packaging that creates optimal storage conditions for the commodity inside



Illuminated wine coolers and creative storage

Consider selling produce in storage solutions that can become a feature in the home



Wave 36 Fast Facts – Asian Vegetables

- ▶ Asian vegetables have positive consumer sentiment and propensity to purchase, consistent with previous waves.
- ▶ Asian vegetables are purchased 5 times per month and are consumed around 9 times per month, higher than the previous wave.
- ▶ Consumers purchase 0.9kg of Asian vegetables per shop. Recalled last spend is \$4.60. Overall, consumers perceive Asian vegetables to be good value for money.
- ▶ National price tracking indicated the average price for Buk Choy in May 2016 was \$2.44 each, which is relatively consistent between states and retailers.
- ▶ Just over one quarter of consumers are unable to recall a type of Asian vegetable. Buk Choy remained the most recalled type of Asian vegetable, followed by Choy Sum and Wombok.
- ▶ Asian vegetables are expected to stay fresh for nearly a week, and freshness expectations are met most of the time. Asian vegetables appear to be largely unaffected by seasonal changes.
- ▶ Ease of preparation and taste are the main influences on purchase of Asian vegetables. Already consuming enough and wanting a variety of vegetables are the primary barriers to purchase.

6.5

is the number of days Asian vegetables are expected to remain fresh once purchased.

1.

Insight:

Asian vegetables are perceived to be very good value for money with consumers intending to purchase more in the future.

Short Term Recommendation:

To increase value perceptions, further highlight the health, taste and ease of preparation of the various varieties of Asian vegetables.

2.

Insight:

Asian vegetables are typically purchased from either mainstream retailers or specialist vegetable retailers.

Long Term Recommendation:

To encourage consumer purchase at a wider variety of retail channels, provide education on the versatility and ease of use of Asian vegetables. Ensure the commodity is well signed at point of purchase, and provide recipe cards and cooking instructions to encourage trial at markets and independent supermarkets.



Wave 36 Fast Facts – Capsicum

- Consistent with previous waves, capsicums have strong category health figures for importance, satisfaction, endorsement and interest in new varieties.
- Purchase and consumption frequency of capsicum declined this wave. Capsicum is consumed on average 10 times per month and is purchased mainly from mainstream and specialist retailers.
- Consumers are purchasing 620g of capsicums on average. Recalled last spend is \$4.00, which is perceived to be good value for money.
- Price tracking for May 2016 showed the national average as \$5.99 per kg for green capsicums.
- Over one half of consumers were unable to recall a type of capsicum. Colour was the main trigger to recall.
- Taste and to use as an ingredient were the key influences to purchase. Barriers to purchase included expense and already consuming enough to balance their diet.
- Consumers expect capsicums to remain fresh for 9 days once purchased. These expectations are increasingly being met all of the time.

\$4.00

is the recalled last spend for capsicums.

1.

Insight:

Freshness expectations are on the rise, with perceptions of short shelf life decreasing as a barrier to purchase.”

Short Term Recommendation:

Continue positive freshness associations with capsicum by providing consumers with best before dates, where possible. Highlighting local provenance will also help to communicate freshness.

2.

Insight:

The importance of provenance is high for capsicum.

Long Term Recommendation:

Ensure the provenance information is clearly communicated at point of sale. For pre-packaged formats, include the ‘Australian grown’ logo on the front to catch consumer’s attention.



Wave 36 Fast Facts – Brussels Sprouts

- ▶ Brussels Sprouts had relatively strong category health figures, with consumers having high future purchase intent.
- ▶ Brussels Sprouts were purchased around three times per month and were consumed six times per month. Purchase is predominantly through mainstream and specialist retailers.
- ▶ Overall, Brussels Sprouts were perceived to be good value for money. Consumers on average purchase 600g of Brussels Sprouts, typically in the format of individual sprouts. Recalled last spend was \$3.60.
- ▶ Price tracking for May 2016 revealed the average price was \$7.63 per kg, substantially lower than \$10.93 per kg recorded in January 2016.
- ▶ Over three quarters of consumers could not recall any types of Brussels Sprouts. Low awareness was consistent with previous waves.
- ▶ Brussels Sprouts were expected to stay fresh for nearly 9 days, which was met most or all of the time.
- ▶ Top triggers for purchase were health and taste. Key barriers to purchase were already consuming enough and wanting a variety in their diet.

55%

of consumers steam their Brussels Sprouts.

1.

Insight:

Consumers are limited to cooking Brussels Sprouts predominantly in Australian cuisines.

Short Term Recommendation:

Encourage a greater range of cooking styles by providing consumers with recipe ideas and methods at point of sale including Asian stir-fried Brussels Sprouts and Italian garlic roasted Brussels Sprouts. Pre-prepared options would appeal to time conscious consumers.

2.

Insight:

The price for Brussels Sprouts around the country has substantially declined in comparison the last wave, yet price has increased as a barrier to purchase.

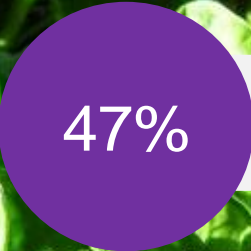
Long Term Recommendation:

Consumers are not driven by price when purchasing Brussels Sprouts but rather by health, taste and ease of preparation. Highlight the versatility of Brussels Sprouts in various cooking styles as well as providing recipe ideas and approximate cooking times. This should improve value for money perceptions.

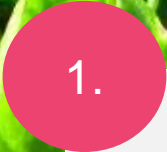


Wave 36 Fast Facts – Spinach

- ▶ Spinach has strong category health figures for importance, satisfaction, endorsement and interest in new varieties.
- ▶ Purchase of spinach occurred around 4 times per month and was consumed on average 10 times per month.
- ▶ Overall, spinach was perceived to be good value for money, with recalled last spend at \$3.40.
- ▶ Consumers on average purchase 0.5kg of spinach, typically in a loose format, with pre-packaged formats also popular options.
- ▶ Price tracking for May 2016 revealed that the average price of Baby Spinach was \$16.82 per kg, consistent with prices recorded in January 2016.
- ▶ Nearly half of consumers could not recall a type of spinach. Baby and English were the most recalled types.
- ▶ Spinach is expected to stay fresh for just over 6 days, which is increasingly being met all of the time.
- ▶ Top triggers for purchase are based around health, ease of preparation, and taste. In contrast, the key barriers included short shelf life and already consuming enough to balance their diet.



of consumers were unable to recall a type of spinach.



1.

Insight:

Average consumption of spinach has declined. This may be due to the cooler months.

Short Term Recommendation:

To encourage consumption across the year, provide consumers with winter appropriate spinach recipes including spinach curry and spinach-cheese pie. Providing health benefits and recipe cards will encourage greater trial.



2.

Insight:

Spinach appeals to the whole family, and is increasing as a trigger to purchase.

Long Term Recommendation:

Ensure that pre-packaged options are available in a range of serving sizes that meet the needs of Australian households. Current purchase of pre-packaged options is down this wave, which may be due to limited and irrelevant package sizes.





Wave 36 Fast Facts – Parsnip

- ▶ Parsnips hold lower levels of importance, satisfaction and endorsement than other vegetables, with future purchase intent relatively weaker than other commodities tracked.
- ▶ Parsnips are purchased on average three times per month and consumed on around five occasions per month. Purchase is primarily from mainstream retailers.
- ▶ On average consumers are purchasing 800g of parsnips per shop. Recalled last spend was \$3.90, with value for money perceived as fair.
- ▶ Price tracking revealed an average price of \$10.94 per kg of parsnips, which was higher than the previous wave (\$9.99 per kg).
- ▶ There are low levels of awareness of parsnip types, with 79% of consumers unable to recall a type.
- ▶ The main motivations for purchasing include adding variety and taste. Wanting variety and expense are the key barriers to purchase.
- ▶ Parsnips are expected to stay fresh for over a week. Expectations of freshness are met at least most of the time.

24%

of consumers do not buy parsnips more often because they are expensive.

1.

Insight:

Consumers purchase parsnips to use as an ingredient in dishes, yet there is little variability in types of cuisines cooked.

Short Term Recommendation:

Provide consumers with inspiration in the supermarket with recipe cards ideas such as parsnip fries and gnocchi. Parsnips can also be used in desserts i.e. parsnip and pear pancakes.

2.

Insight:

There is a trending decline in purchase from specialist vegetable retailers and markets.

Long Term Recommendation:

Ensure that supply can meet demand for parsnip by investigating supply channel opportunities outside of mainstream retailers.



Wave 36 Fast Facts – Beetroot

- ▶ Beetroot has strong levels of endorsement, indicating consumers are happy to recommend to family and friends. Future propensity to purchase is high.
- ▶ Beetroot is purchased approximately 3 times per month. Consumption of beetroot occurs 8 times per month, relatively consistent with the previous wave.
- ▶ On average, consumers purchase 0.9kg of beetroot. Recalled last spend was \$3.70. Overall, consumers perceive good value for money.
- ▶ Price tracking revealed both loose and bunched beetroot could be purchased from most mainstream retailers. Average price per kg in May was \$4.99.
- ▶ Awareness of beetroot types is very low, with 73% of consumers unable to recall a type.
- ▶ Beetroot is expected to remain fresh for just under 10 days. Freshness expectations are being met at least most of the time.
- ▶ Taste and health remain the key triggers to purchase. The main barriers to future purchase are consuming enough and not wanting to waste any.

79%

of new products launched globally which contained beetroot were from Europe.

1.

Insight:

Beetroot has high interest in new varieties and strong word of mouth recommendations.

Short Term Recommendation:

Leverage strong future purchase interest by introducing new beetroot varieties into the Australian market. Ensure new varieties clearly communicate flavour and textural descriptors to differentiate from current in-market commodities. As beetroots are purchased for their colour, greater distribution of yellow beetroots may be an opportunity.

2.

Insight:

There were four new products launched in Australia containing beetroot in the last three months.

Long Term Recommendation:

Look to international launches and trends to see how other industries are utilising beetroot in products. Products such as beetroot 'noodles' and juices that highlight health benefits will especially appeal to Conscious Improvers.





Wave 36 Fast Facts –Sweetpotatoes

- ▶ Sweetpotato has strong endorsement and interest, with high future purchase intent.
- ▶ Purchase of sweetpotato occurs 3 times per month and is consumed around 8 times per month, a slight increase from the last wave. Purchase is typically from mainstream retailers.
- ▶ Overall, sweetpotato is perceived to be good value for money (6.8/10). On average, consumers purchase 1.3kg of sweetpotato, typically loose. Recalled last spend is \$3.80.
- ▶ Price tracking for May 2016 revealed an average price of \$3.54 per kg, consistent with prices in January 2016.
- ▶ Two thirds of consumers were unable to recall a variety of sweetpotato. Those who did more often recalled the colour rather than a specific variety, with Orange / Gold / Yellow being the most recalled colour.
- ▶ Taste, ease of preparation and health are the strongest triggers to purchase, while already consuming enough for their needs and not wanting to waste any the two biggest barriers.
- ▶ Consumers expect sweetpotato to remain fresh for nearly two weeks, which is being met at least most of the time.

1.3kg

is the average weight of purchase for sweetpotatoes.

1.

Insight:

Two thirds of consumers are unable to recall a sweetpotato variety.

Short Term Recommendation:

As taste is a key trigger to purchase, use variety specific flavour differences to help educate consumers on the sweetpotato varieties available.

2.

Insight:

The majority of consumers are eating sweetpotato at dinner meal occasions.

Long Term Recommendation:

Highlight the versatility of sweetpotato outside of dinner by providing consumers with recipe ideas, such as sweetpotato salads that are suitable for lunch time. Investigate new product ideas suitable for breakfast and lunch, like sweetpotato fritters or sweetpotato soup packs.





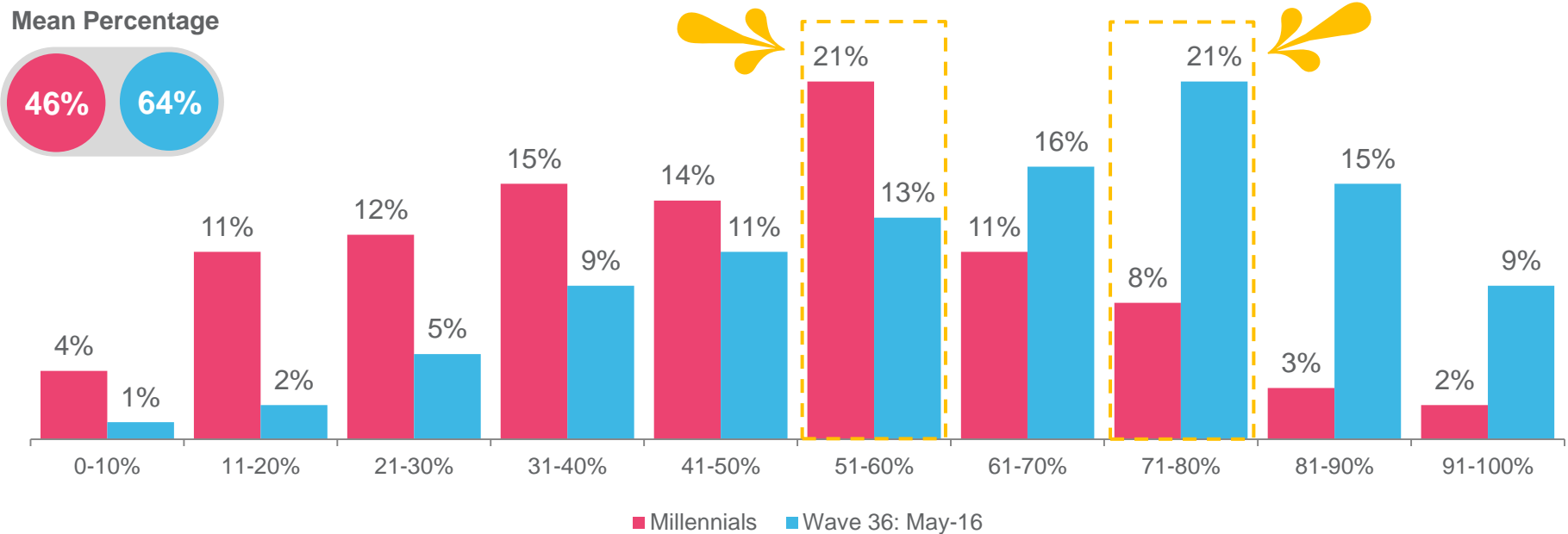
Wave 36:
Response to Ad hoc
Questions



Compared with Millennials, the average Australian consumer believes that a higher proportion of fresh vegetables available at retailers is grown in Australia.

However, for both groups of consumers, the perceived proportion is lower than what is actually available in-store. Education is required to strengthen the value and quality of Australian grown produce.

What percentage of fresh vegetables at your local store do you think are Australian grown

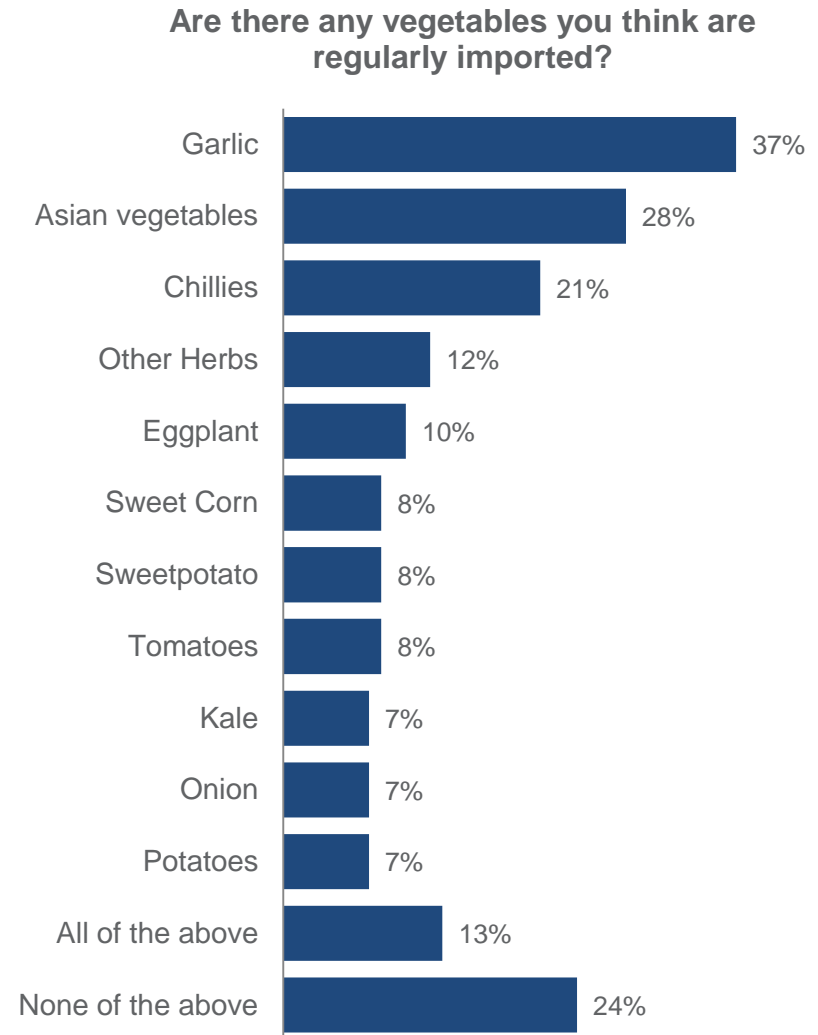




Over one third of consumers indicated that they believe garlic is imported into Australia. They are indeed correct as garlic is one of the most commonly imported vegetables into the country.

Exotic vegetables, such as Asian vegetables, chillies and herbs are commonly assumed to be imported.

Education and clearer labelling is required to dispel misconceptions about importation of vegetables.





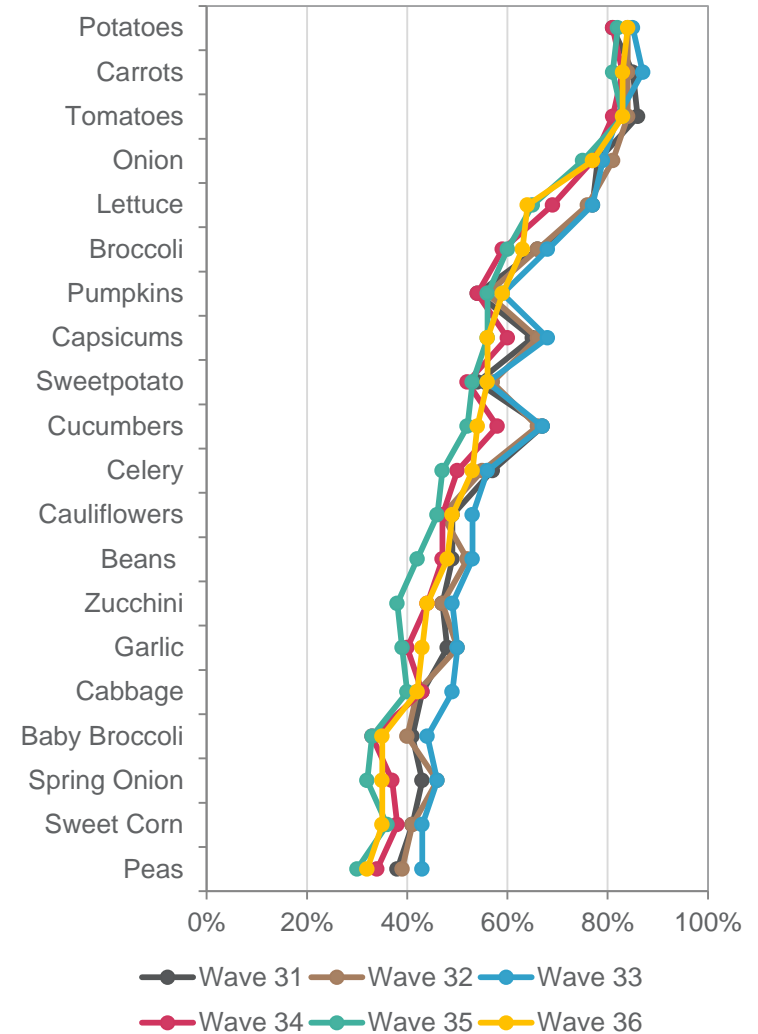
Wave 36: Overall Vegetable Tracking



Top 20 Vegetables Purchased Last Month

Potatoes, carrots and tomatoes continue to be the staple vegetables, purchased regularly every month.

Vegetable purchase in May is relatively consistent with past months. This wave sees the biggest increase in purchase from celery, beans and zucchini.



Sample Wave 36 N=1862 (base in higher as Q appears in Screener)
S8. Which of the following fresh vegetables have you purchased in the last month?



Category Health Explained.

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

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

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





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

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

	Asian Vegetables	Capsicum	Brussels Sprouts	Spinach	Parsnip	Beetroot	Sweet-potatoes	Vegetable Average
Importance	7.6	7.3	6.8	7.3	6.1	6.0	6.3	6.4
Satisfaction	7.2	7.4	6.9	7.1	6.1	6.4	6.9	6.7
Endorsement	7.8	7.3	7.1	7.8	6.5	7.4	7.8	7.0
Interest (New Varieties)	7.5	6.9	6.7	7.1	6.3	6.7	6.8	6.3
Future Purchase								
More	29%	15%	21%	20%	16%	28%	22%	16%
Same	71%	84%	78%	79%	83%	71%	78%	83%
Less	0%	2%	1%	1%	1%	0%	0%	1%

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



Asian
Vegetables.

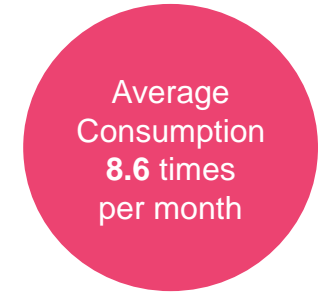


Purchase and consumption of Asian vegetables increased this wave. On average, consumers eat Asian vegetables twice a week.

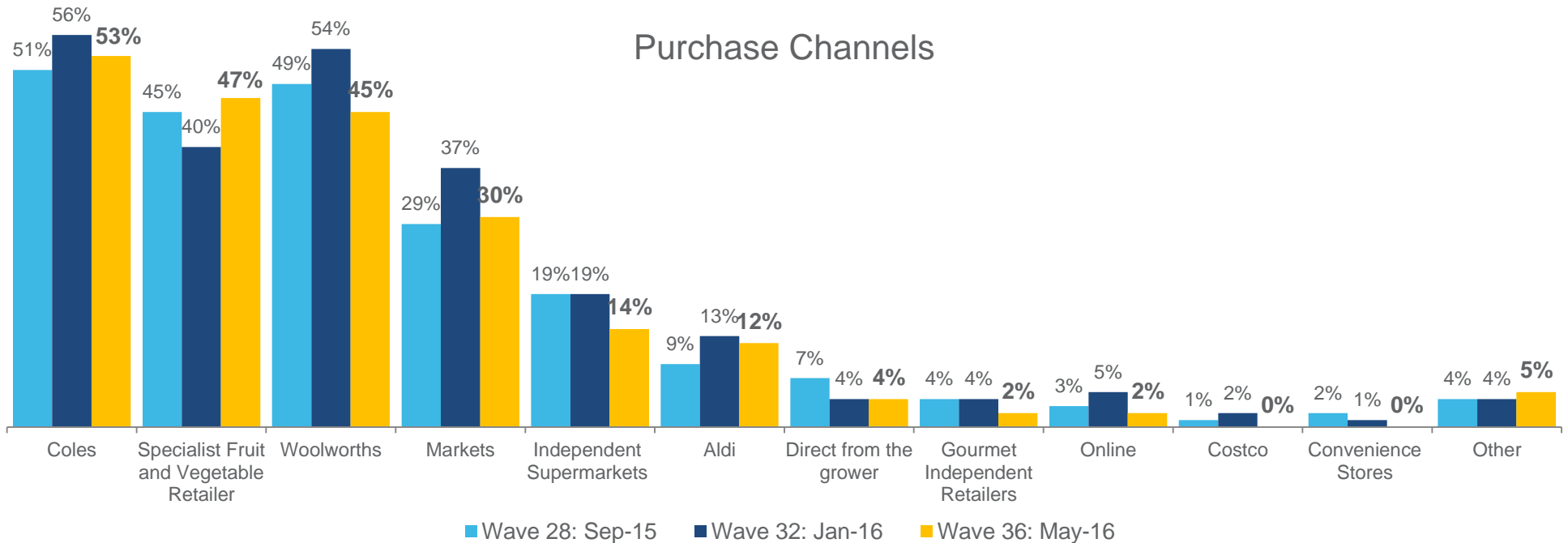
Coles remains the key location for purchase. There has been a noticeable increase in purchase from specialist vegetable retailers, which has overtaken Woolworths this wave.



▲ 5.0 times, Wave 28
▼ 4.4 times, Wave 32



▲ 8.8 times, Wave 28
▼ 7.6 times, Wave 32



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 28 N=310, Wave 32 N=303, Wave 36 N=301



Average Spend and Price Sensitivity.



Average weight of purchase

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

- 0.9kg, Wave 28
- 0.9kg, Wave 32



Recalled last spend

The average recalled last spend in May 2016 is **\$4.60**. This is slightly lower than the last wave.

- ▲ \$4.80, Wave 28
- ▲ \$5.10, Wave 32



Value for money

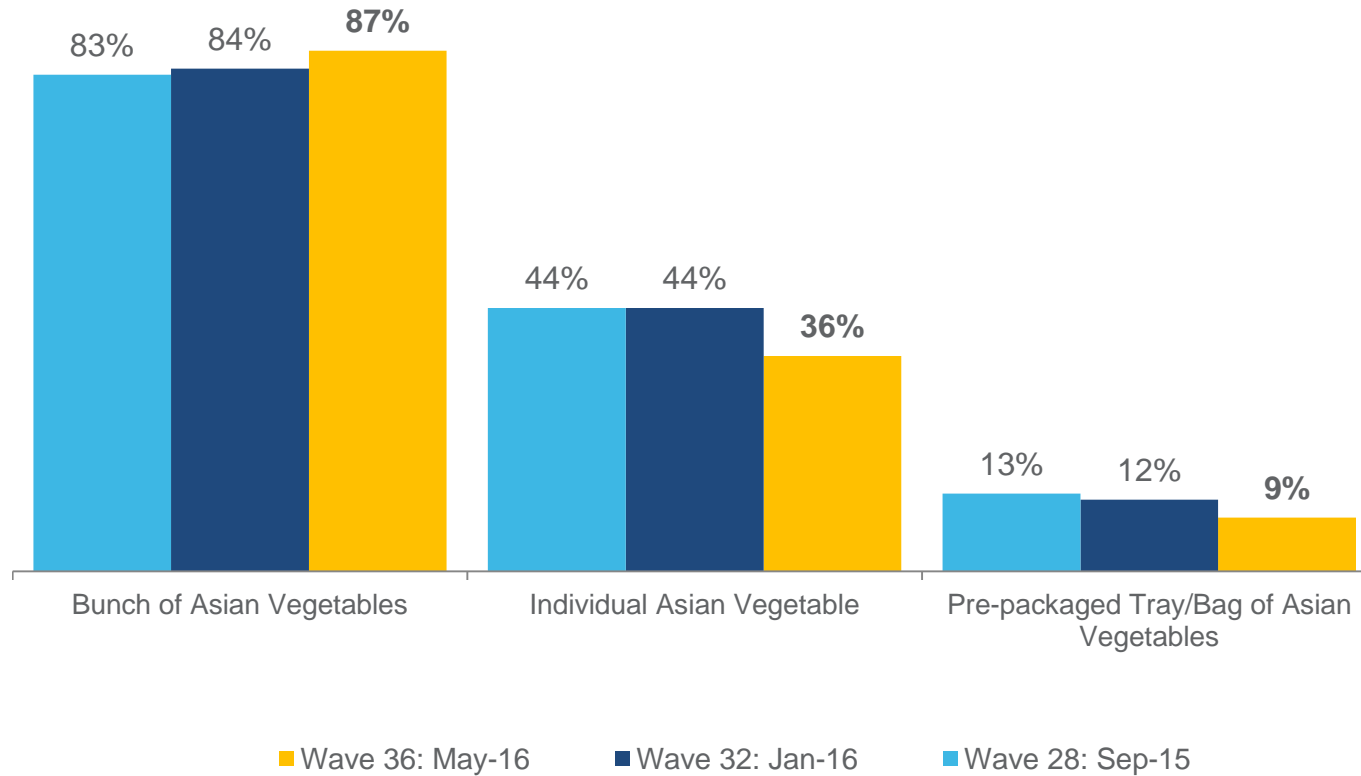
On average, consumers perceive Asian vegetables to be good value for money (**7.3/10**), which has noticeably increased this wave.

- ▼ 6.8/10, Wave 28
- ▼ 6.6/10, Wave 32

Q3. How much <commodity> do you typically purchase when you shop for it?
 Q3b. To the best of your memory how much did this cost on your most recent typical purchase?
 Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
 Sample Wave 28 N=310, Wave 32 N=303, Wave 36 N=301



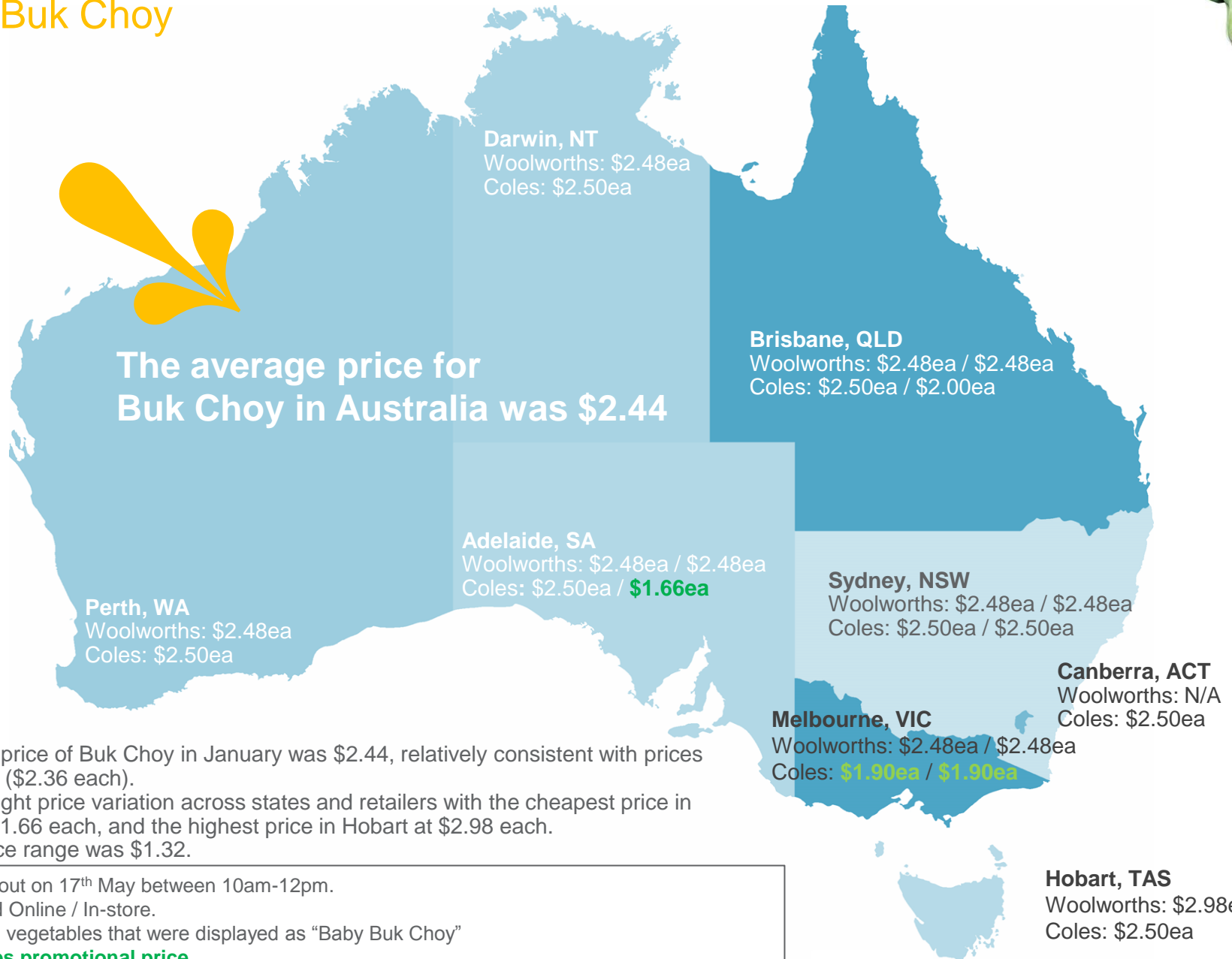
Bunched Asian vegetables continue to be the main format purchased, consistent with the previous waves.



Q4b In what fresh formats do you typically purchase Asian vegetables (bok choy, choy sum etc.)?
Sample Wave 28 N=310, Wave 32 N=303, Wave 36 N=301

Online and In-store Commodity Prices.

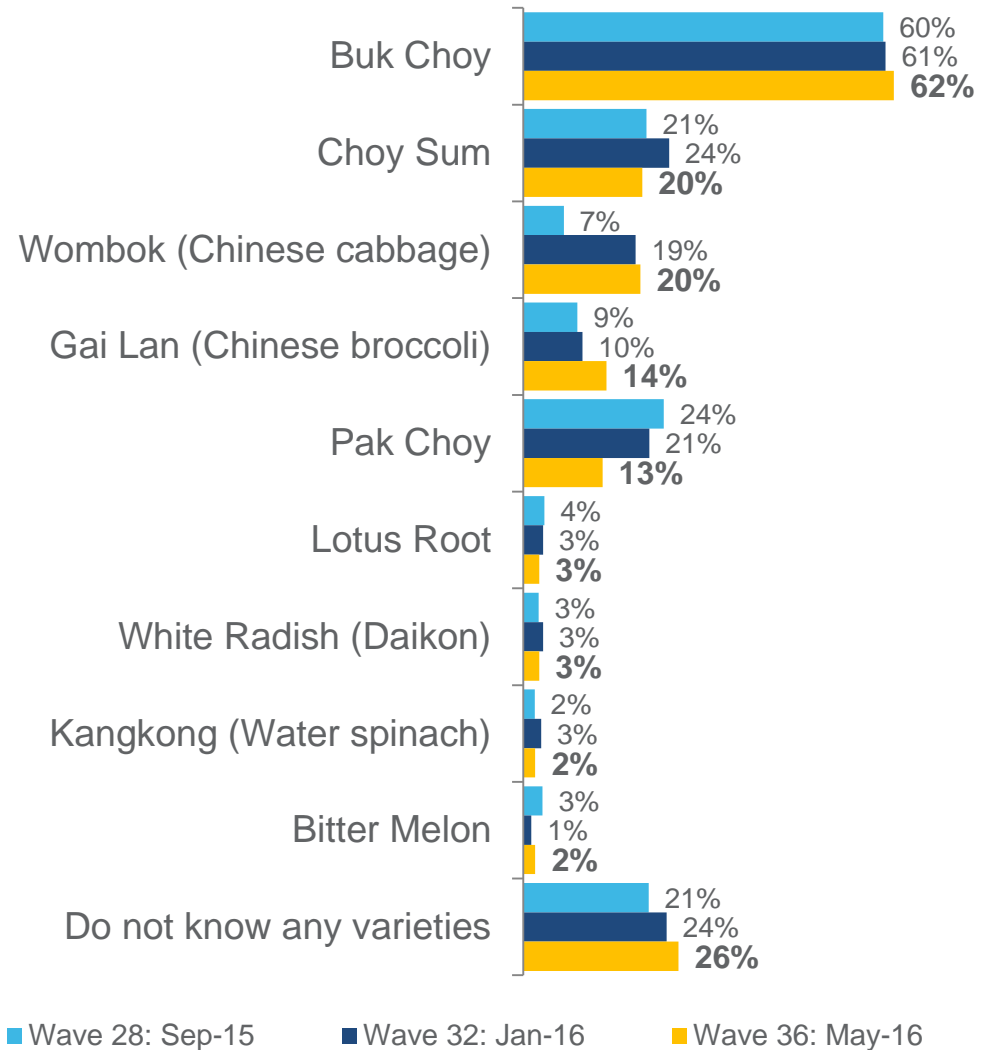
Baby Buk Choy





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

Buk Choy and Choy Sum have the greatest recall amongst consumers, with an increasing trend in awareness of Gai Lan (Chinese Broccoli).



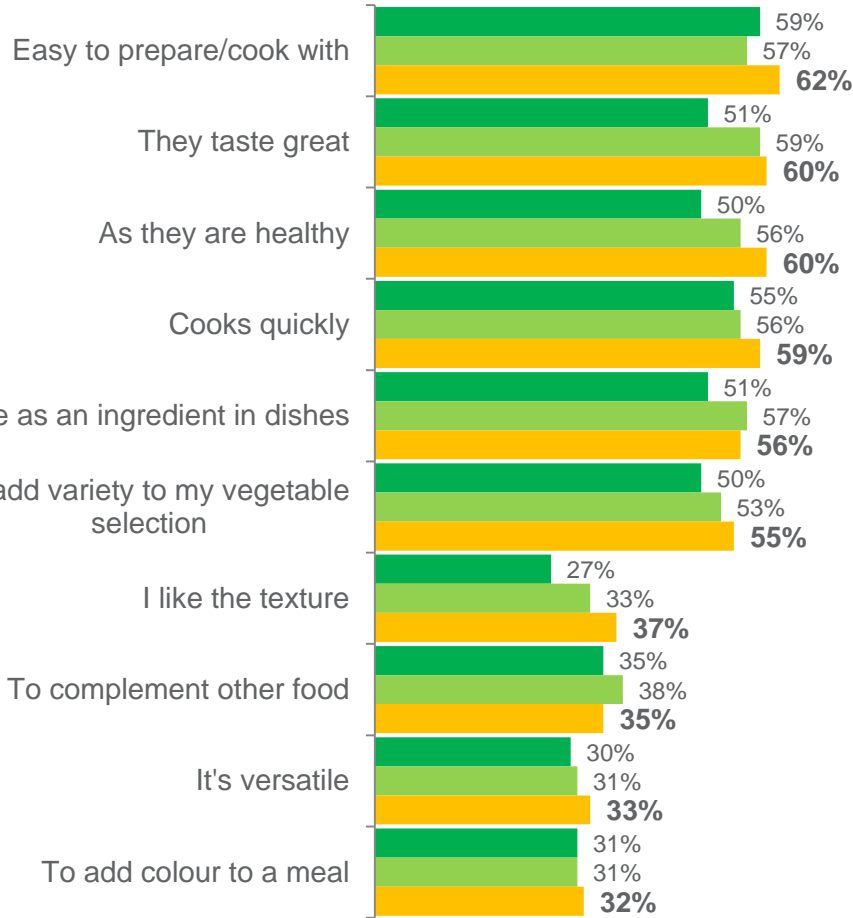
Q6a. What varieties/types of <commodity> are you aware of? (unprompted)
Sample Wave 28 N=310, Wave 32 N=303, Wave 36 N=301



Ease of preparation and taste are the main drivers of purchase. The key barriers to purchase are consumers already eating enough and wanting variety in their diet. There is an increasing trend in health and texture as triggers to future purchase.

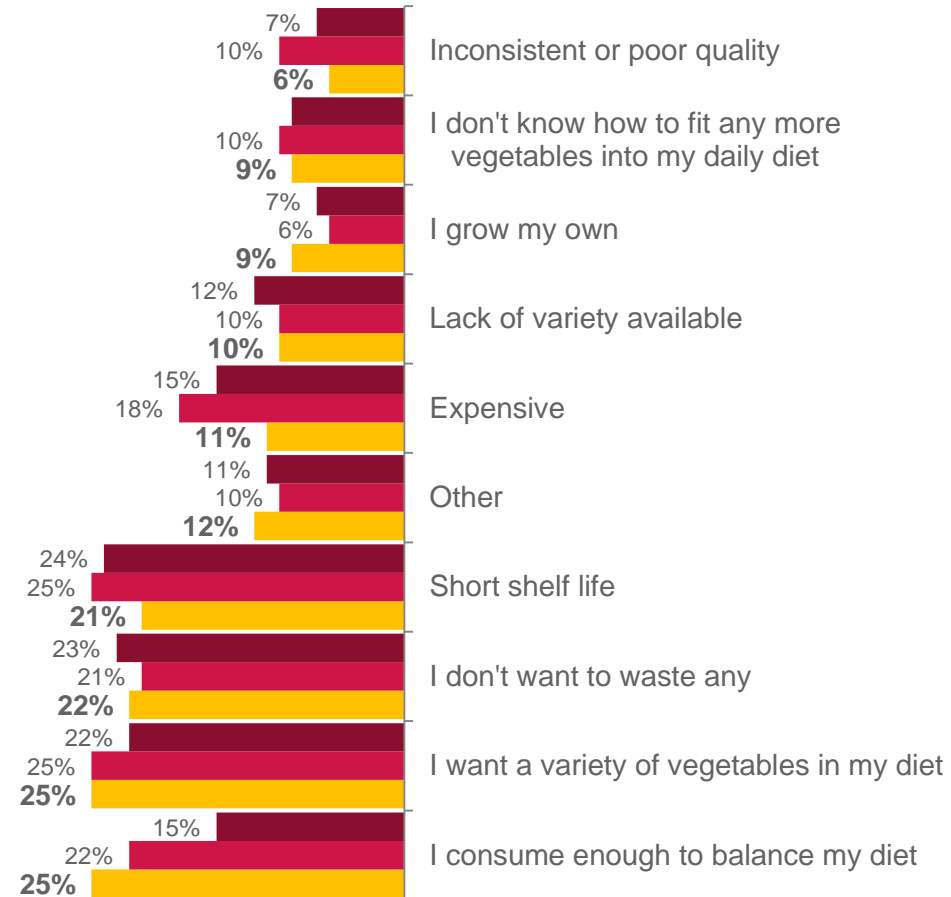


Triggers



■ Wave 28: Sep-15 ■ Wave 32: Jan-16 ■ Wave 36: May-16

Barriers



■ Wave 28: Sep-15 ■ Wave 32: Jan-16 ■ Wave 36: May-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 28 N=310, Wave 32 N=303, Wave 36 N=301



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

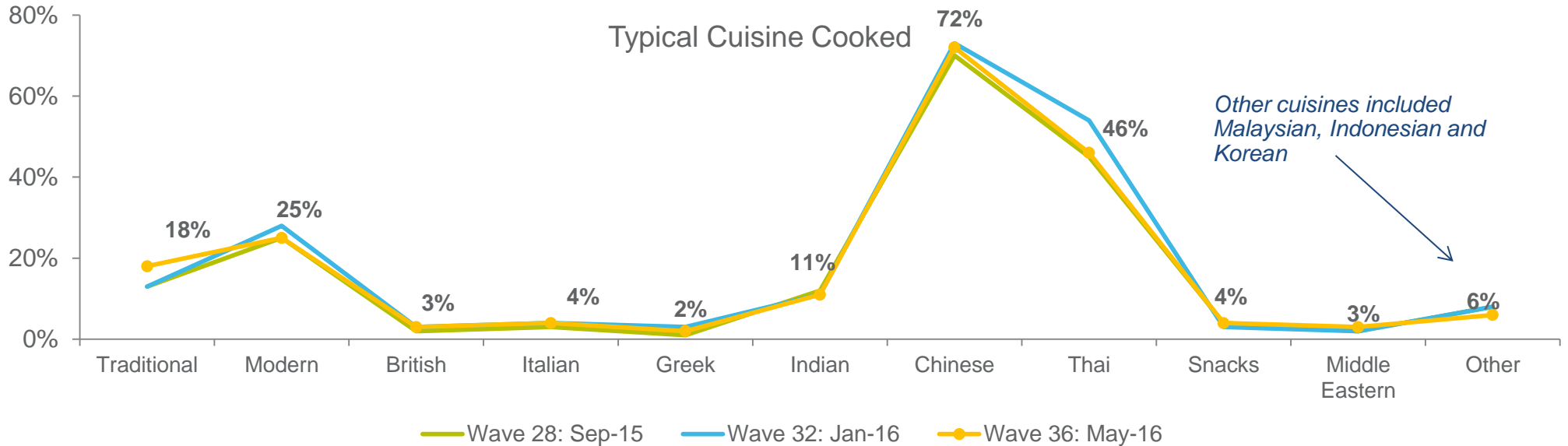
Consumers are cooking Chinese, Thai and Vietnamese cuisines, consistent with previous waves.

Top 5 Consumption Occasions

	Wave 32	Wave 36
Dinner	75%	73%
Family Meals	59%	51%
Weekday Meals	50%	47%
Quick Meals	51%	44%
Weekend Meals	39%	41%

20%
used Asian vegetables when cooking a new recipe

▲ 25%, Wave 32



Q10. What cuisines do you cook/consume that use <commodity>?
 Q11. Which of the following occasions do you typically consume/use <commodity>?
 Sample Wave 28 N=310, Wave 32 N=303, Wave 36 N=301

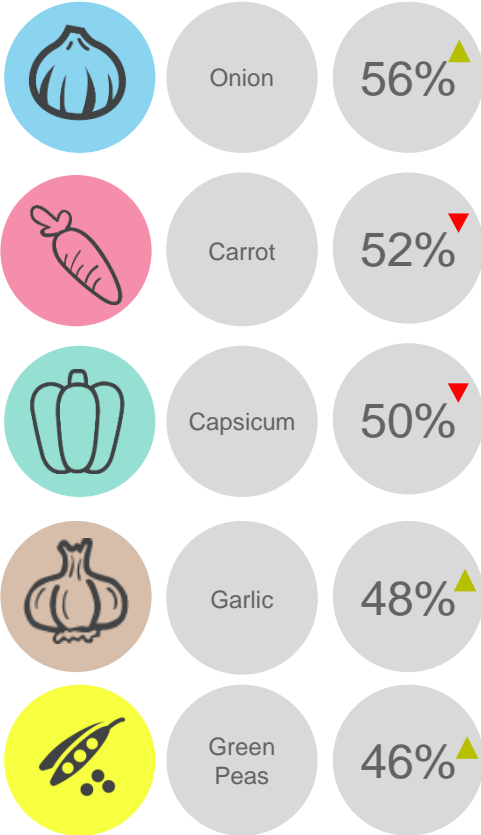


▼ : Indicates LOWER score than current wave.
 ▲ : Indicates HIGHER score than current wave.



Cooking preferences remain consistent between waves. Consumers typically stir fry Asian vegetables and are typically cooked with onions, carrots, and capsicums.

Accompanying Vegetables



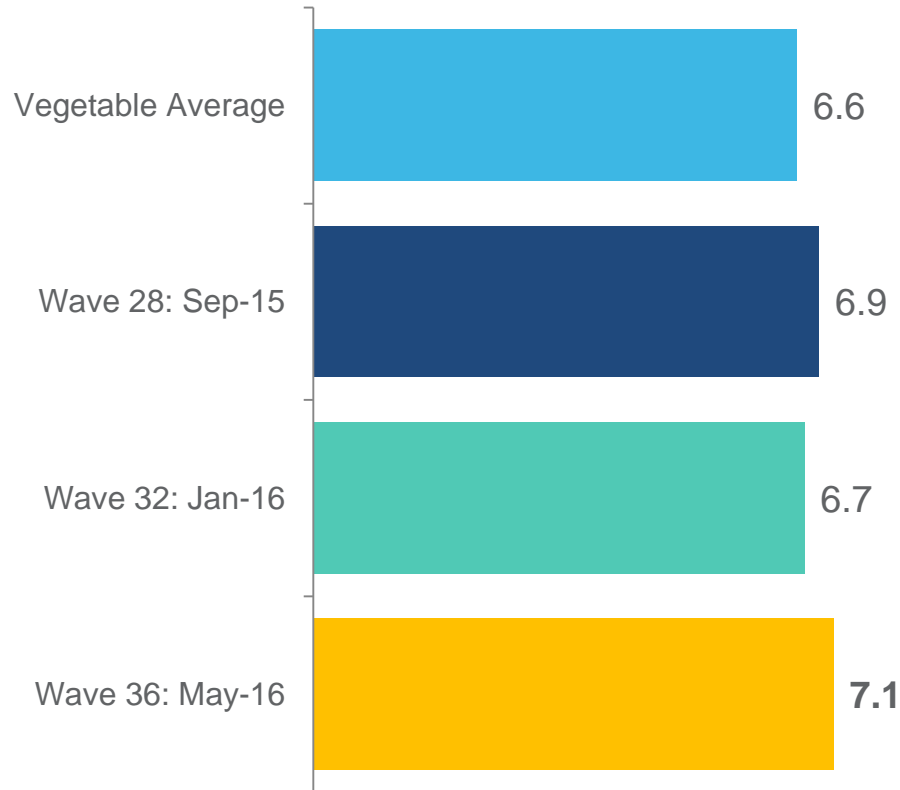
Top Cooking Styles

	Wave 28	Wave 32	Wave 36
Stir frying	82%	84%	81%
Steaming	45%	49%	46%
Soup	26%	25%	26%
Sautéing	23%	31%	26%
Boiling	18%	19%	19%
Frying	17%	16%	18%
Slow Cooking	10%	7%	9%
Raw	13%	15%	8%
Microwave	10%	6%	8%
Grilling	4%	5%	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 28 N=310, Wave 32 N=303, Wave 36 N=301



Asian vegetable provenance has increased in importance this wave, which sits above the Vegetable Average.



Q14. When purchasing <commodity>, how important is Provenance to you?
Q15. And when purchasing <commodity>, how important is that it is grown in Australia?
Mean scores out of 10.
Sample Wave 28 N=310, Wave 32 N=303, Wave 36 N=301

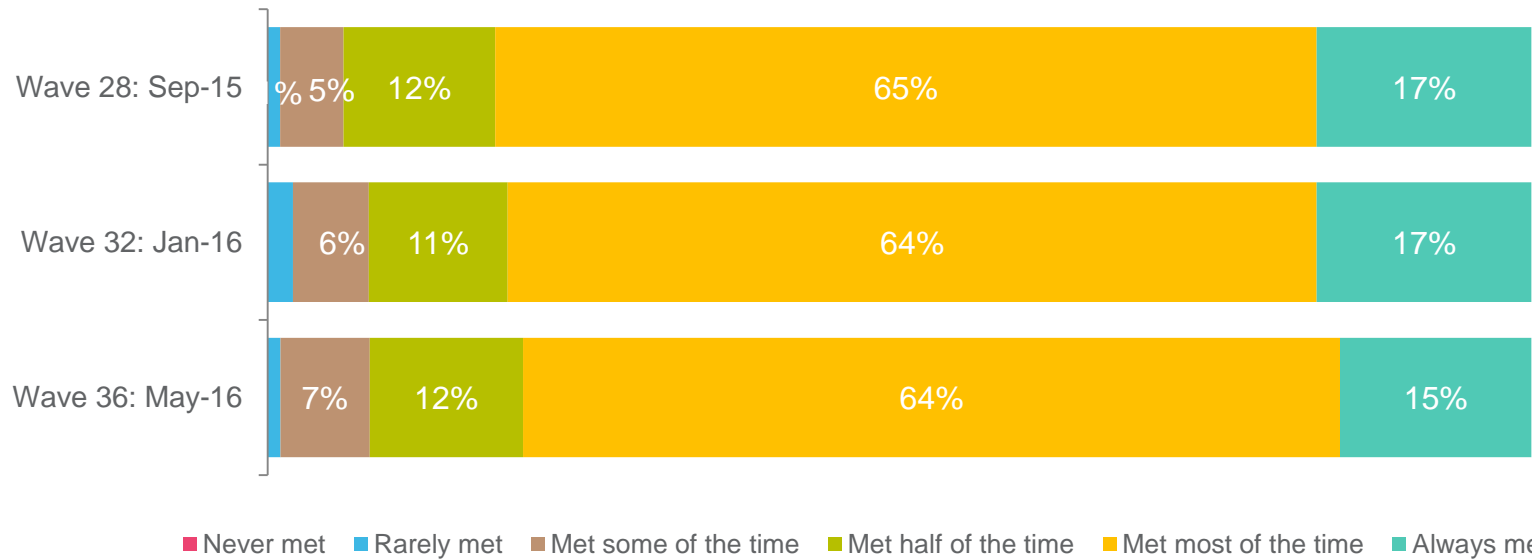


Once purchased, consumers expect Asian vegetables to remain fresh for approximately one week. Expectations of freshness are met most of the time, consistent with past waves.

Expected to stay fresh for 6.5 days

- ▼ 5.8 days, Wave 28
- ▼ 5.7 days, Wave 32

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 28 N=310, Wave 32 N=303, Wave 36 N=301



Trends: Asian Vegetables

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





Innovative Asian Vegetables Launches:

L3M (February – May 2016)

7-Eleven Hyeri Honey & Grilled Chicken Lunch Box (South Korea)

7-Eleven Hyeri Honey & Grilled Chicken Lunch Box is now available. This microwaveable product retails in a 498g pack featuring South Korean singer and actress, Hyeri.



Claims:
Microwaveable

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

Yorihada Shanghai Spicy White Noodle with Seafood (South Korea)

Yorihada Shanghai Spicy White Noodle with Seafood contains two 170g packets of rice noodle, two 30g packets of sauce, two 6g packets of vegetable garnish, and two 6g packets of seafood solids. They are made with thick stock simmered with pork bone and clam, added with spicy cheongyang chilli and chewy rice noodle. This Shanghai style product is easy to cook at home, and retails in a 424g pack which is sufficient for two servings.



Claims:
Ease of Use

Asda Chosen by You Fresh Tastes Kitchen Sticky Asian Chicken Noodles (UK)

Asda Chosen by You Fresh Tastes Kitchen Sticky Asian Chicken Noodles comprise of pieces of chicken breast, red peppers, carrot, cabbage, pak choi and red onion in an Asian style sauce accompanied by udon noodles and ginger together. The meal provides two of five a day, and is free from colours, flavours and hydrogenate fat. This product can be ready by using microwave in just seven minutes and retails in a 410g partly recyclable pack.



Claims:
No Additives/Preservatives, Microwaveable, Low/No/Reduced Transfat, Ethical - Environmentally Friendly Package, Time/Speed

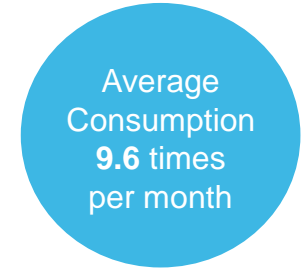


Capsicums.



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

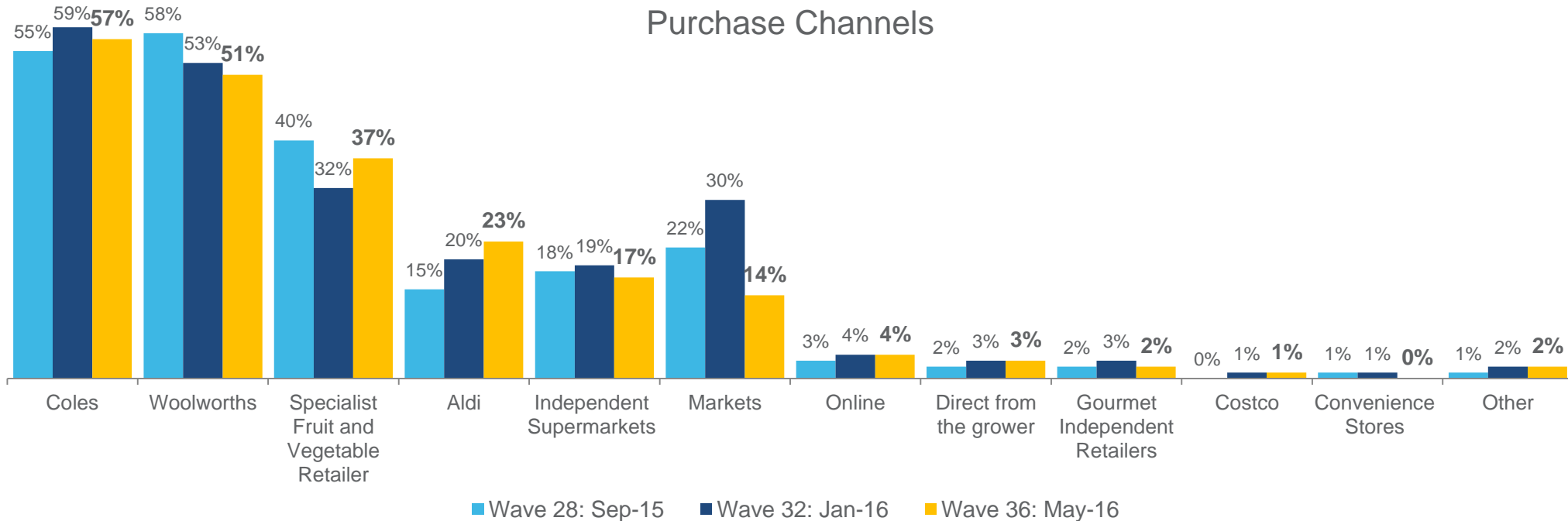
Capsicum is generally purchased from mainstream and specialist retailers, with purchase from Aldi consistently trending upwards. There was a significant decline in purchase from markets this wave.



- ▲ 4.1 times, Wave 28
- ▲ 4.2 times, Wave 32

- ▲ 10.3 times, Wave 28
- ▲ 10.5 times, Wave 32

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 28 N=319, Wave 32 N=308, Wave 36 N=306



Average Spend and Price Sensitivity



Average weight of purchase

The average consumer typically purchased **620g** of capsicum in May 2016, which has decreased from the previous wave.

- ▼ 610g, Wave 28
- ▲ 660g, Wave 32



Recalled last spend

The average recalled last spend for capsicum was **\$4.00**, which is relatively consistent with past waves.

- ▼ \$3.80, Wave 28
- ▲ \$4.20, Wave 32



Value for money

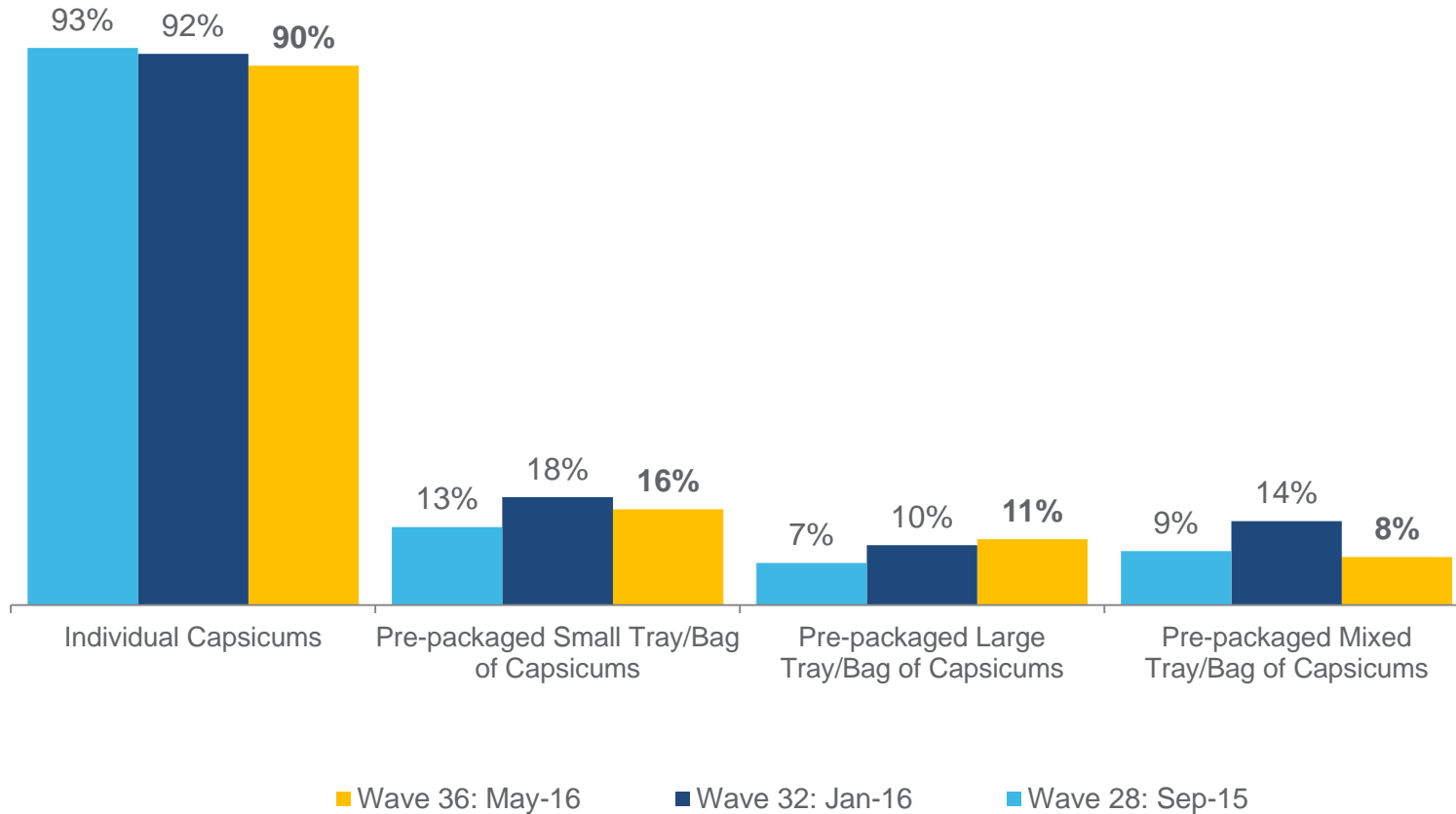
On average, consumers perceived capsicum to be good value for money **(6.3/10)**, which is higher than the last wave.

- ▼ 6.0/10, Wave 28
- ▼ 5.9/10, Wave 32

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 28 N=319, Wave 32 N=308, Wave 36 N=306



Individual capsicums remain the key format for purchase, consistent with previous waves.

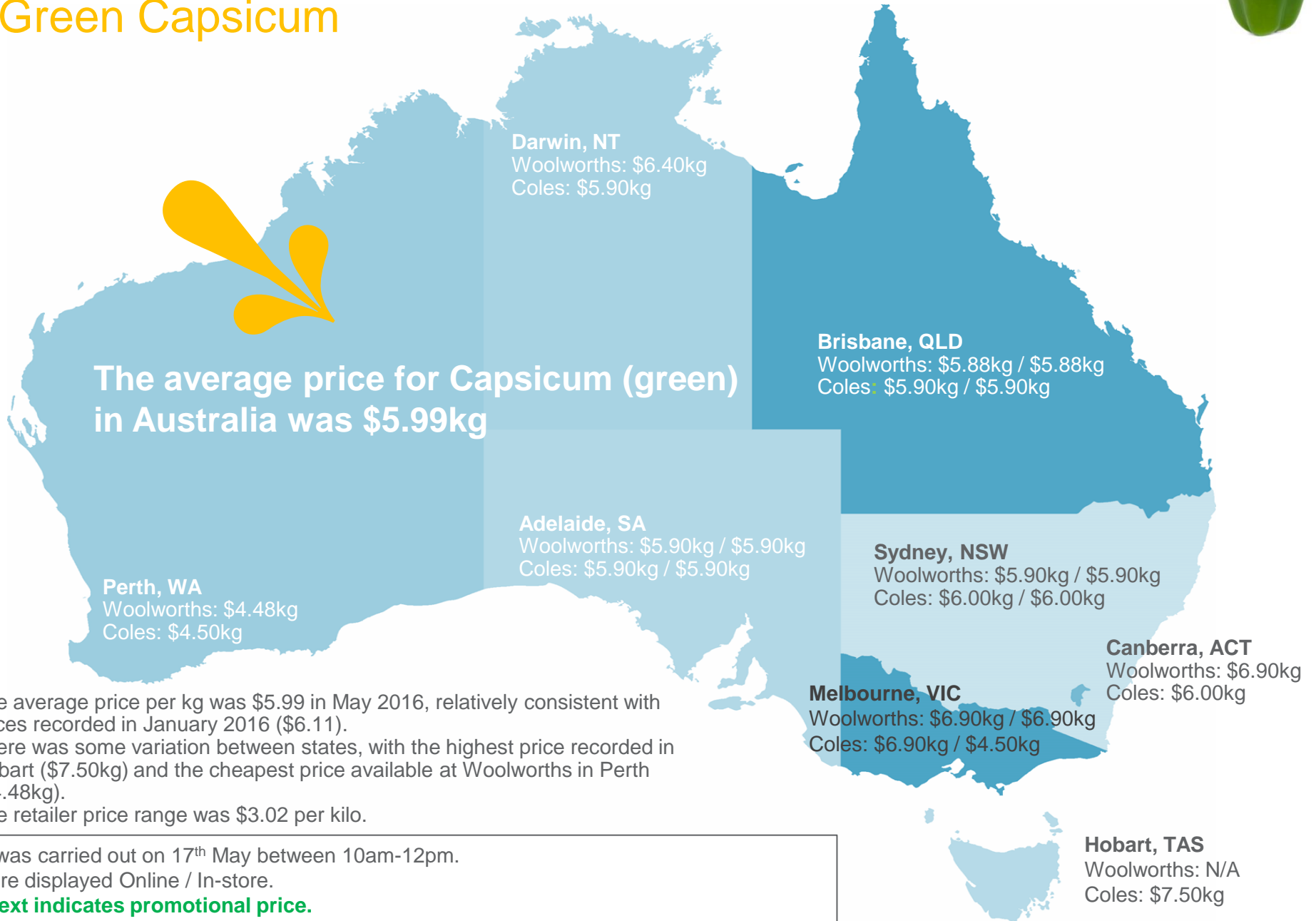


Q4b. In what fresh formats do you typically purchase Capsicums?
Sample Wave 28 N=319, Wave 32 N=308, Wave 36 N=306



Online and In-store Commodity Prices

Green Capsicum

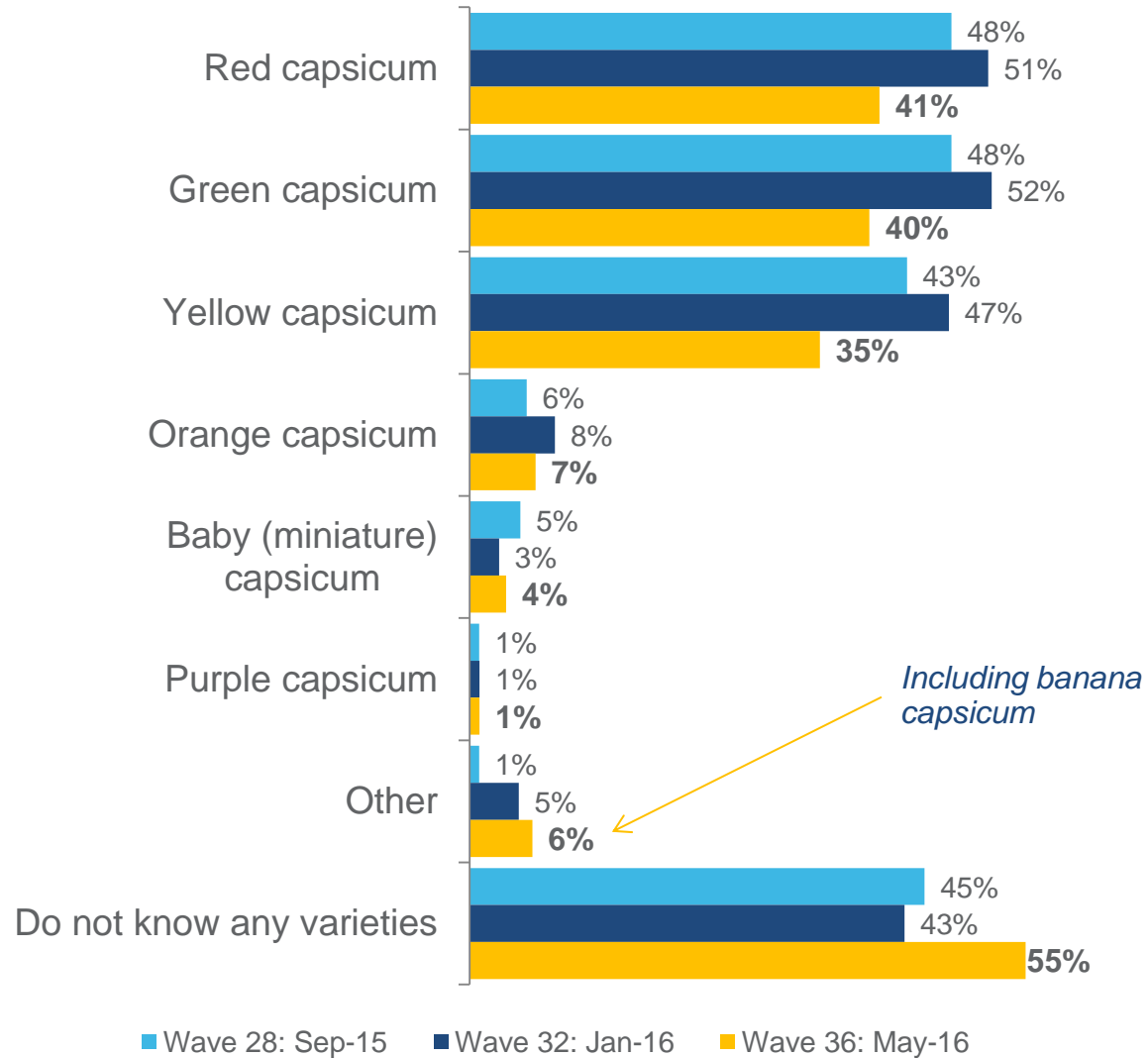


- The average price per kg was \$5.99 in May 2016, relatively consistent with prices recorded in January 2016 (\$6.11).
- There was some variation between states, with the highest price recorded in Hobart (\$7.50kg) and the cheapest price available at Woolworths in Perth (\$4.48kg).
- The retailer price range was \$3.02 per kilo.

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



Red, green and yellow capsicums have the greatest level of recall. More than half of all consumers could not recall a type of capsicum this wave.

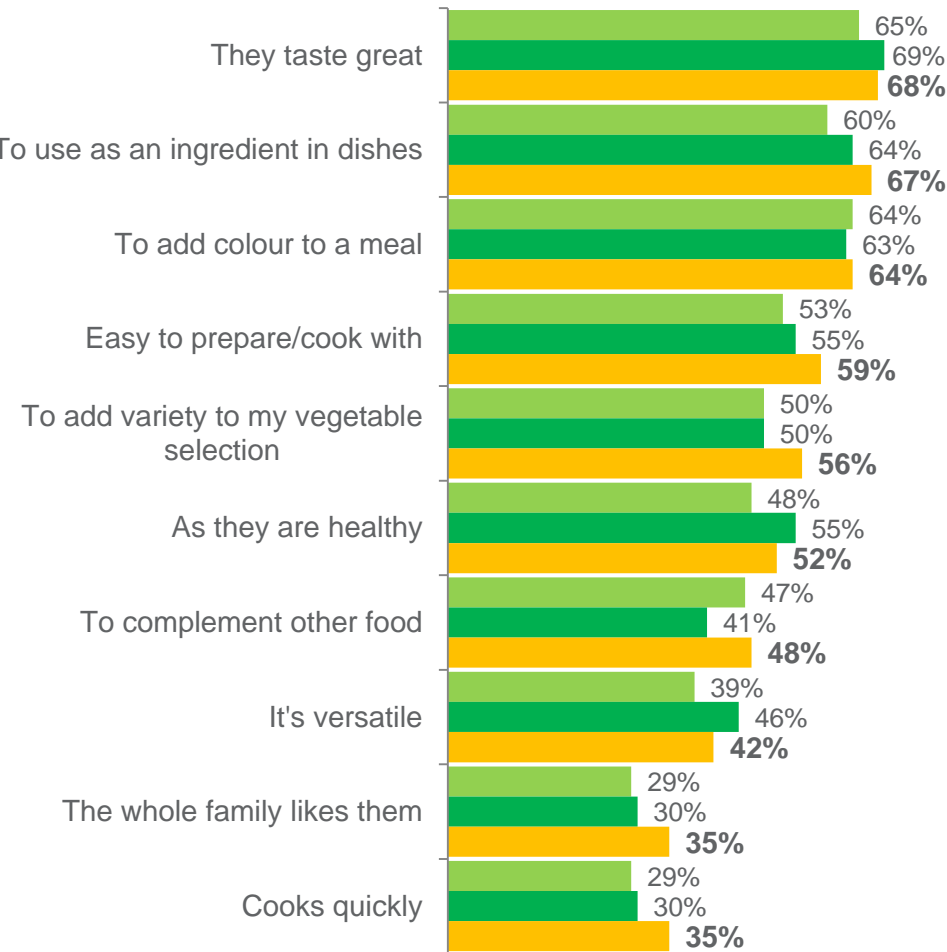




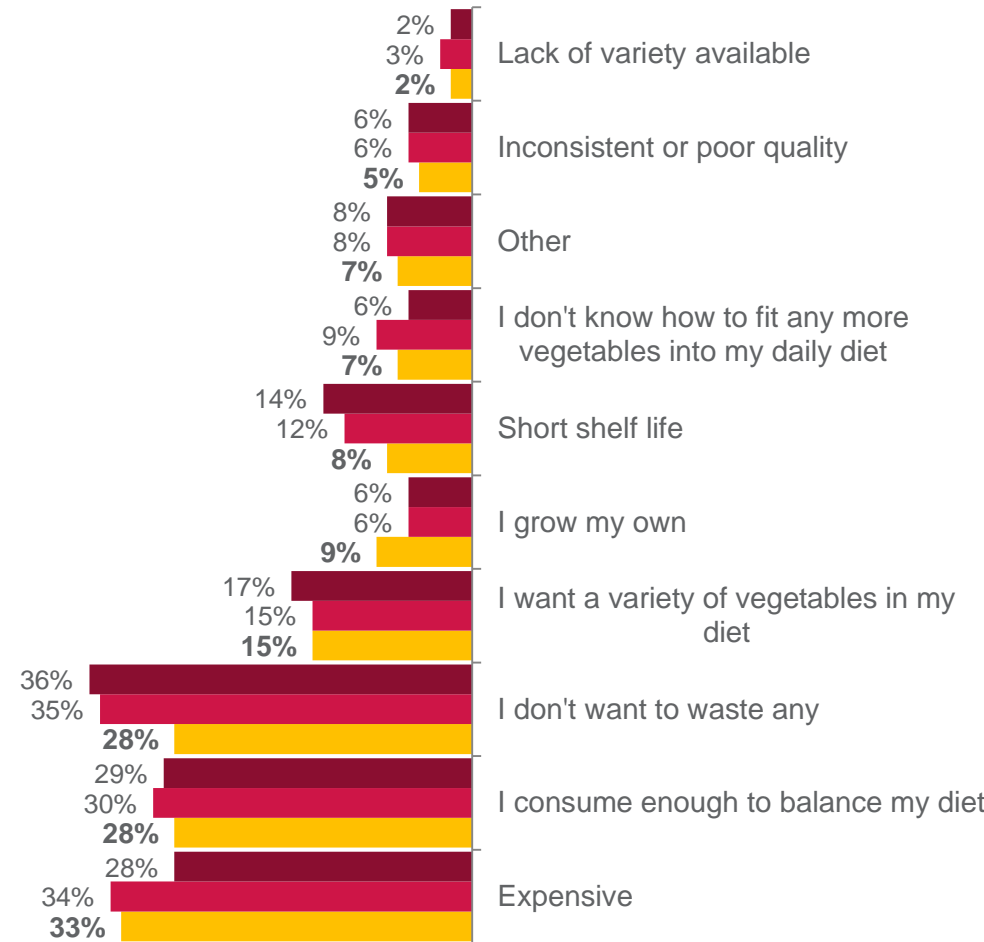
The key triggers to purchase are taste and use as an ingredient in dishes. The main barriers to purchase included being too expensive and already consuming enough.



Triggers



Barriers



■ Wave 28: Sep-15 ■ Wave 32: Jan-16 ■ Wave 36: May-16

■ Wave 28: Sep-15 ■ Wave 32: Jan-16 ■ Wave 36: May-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 28 N=319, Wave 32 N=308, Wave 36 N=306



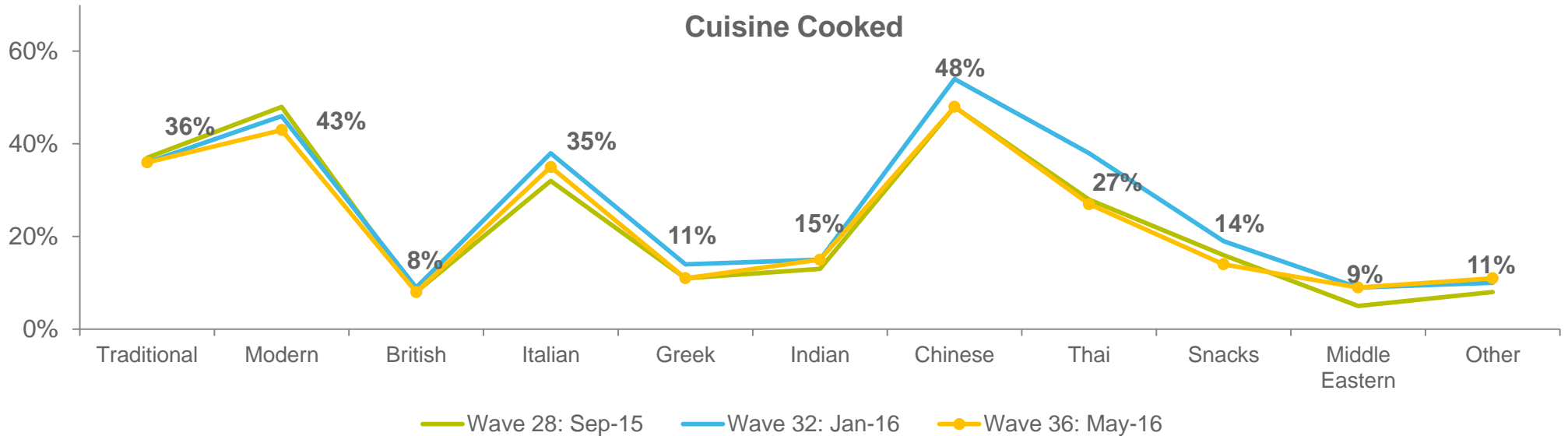
Capsicums are most frequently cooked in Asian and Australian cuisine, particularly Chinese and Modern Australian. Dinner remains the main consumption occasion.

Top 5 Consumption Occasions

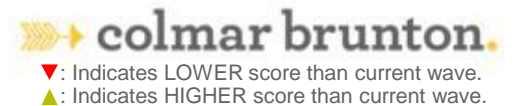
	Wave 32	Wave 36
Dinner	73%	74%
Family Meals	58%	58%
Weekday Meals	54%	52%
Quick Meals	54%	49%
Weekend Meals	45%	45%

22%
used capsicum
when cooking a
new recipe

▲ 26%, Wave 32

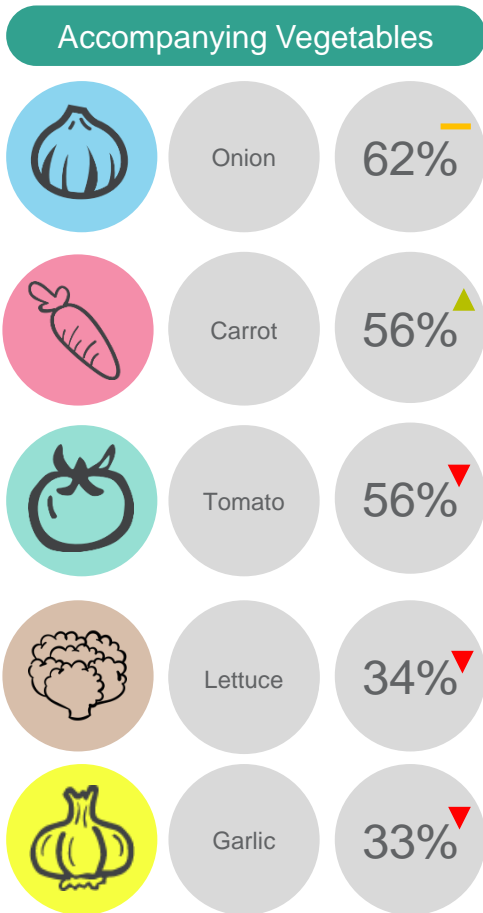


Q10. What cuisines do you cook/consume that use <commodity>?
 Q11. Which of the following occasions do you typically consume/use <commodity>?
 Sample Wave 28 N=319, Wave 32 N=308, Wave 36 N=306





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

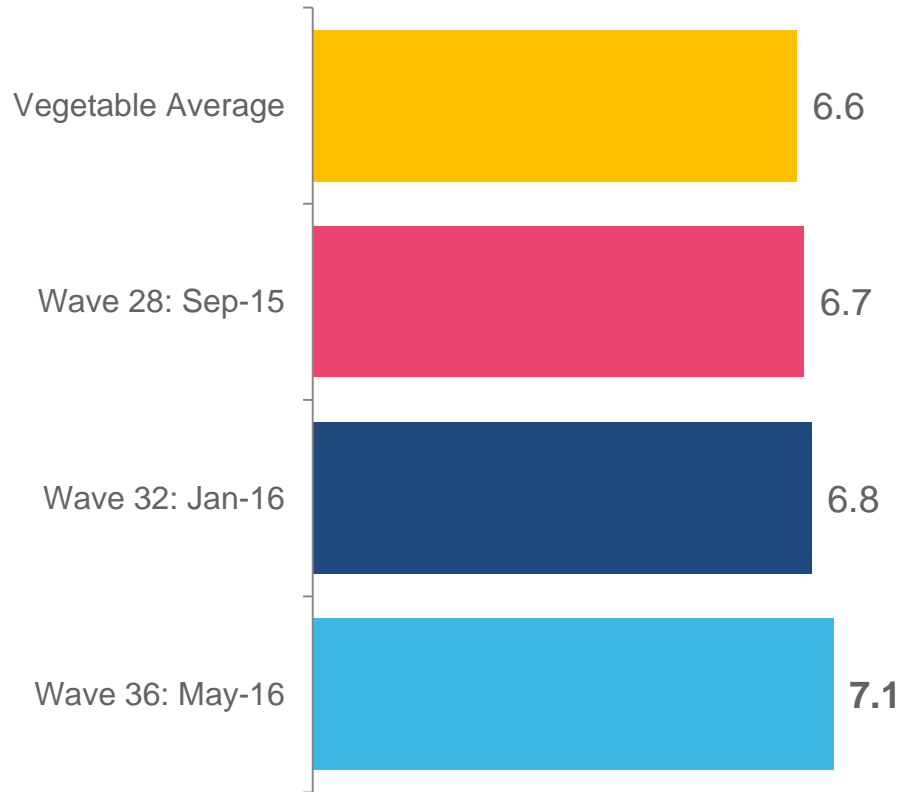


Top 10 Cooking Styles			
	Wave 28	Wave 32	Wave 36
Stir frying	73%	78%	74%
Raw	53%	60%	57%
Roasting	33%	33%	33%
Frying	29%	24%	30%
Slow Cooking	19%	19%	24%
Sautéing	19%	26%	23%
Grilling	20%	25%	20%
Soup	14%	12%	19%
Baking	20%	20%	18%
Steaming	10%	13%	10%

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 28 N=319, Wave 32 N=308, Wave 36 N=306



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



Q14. When purchasing <commodity>, how important is Provenance to you?
Mean scores out of 10.
Sample Wave 28 N=319, Wave 32 N=308, Wave 36 N=306

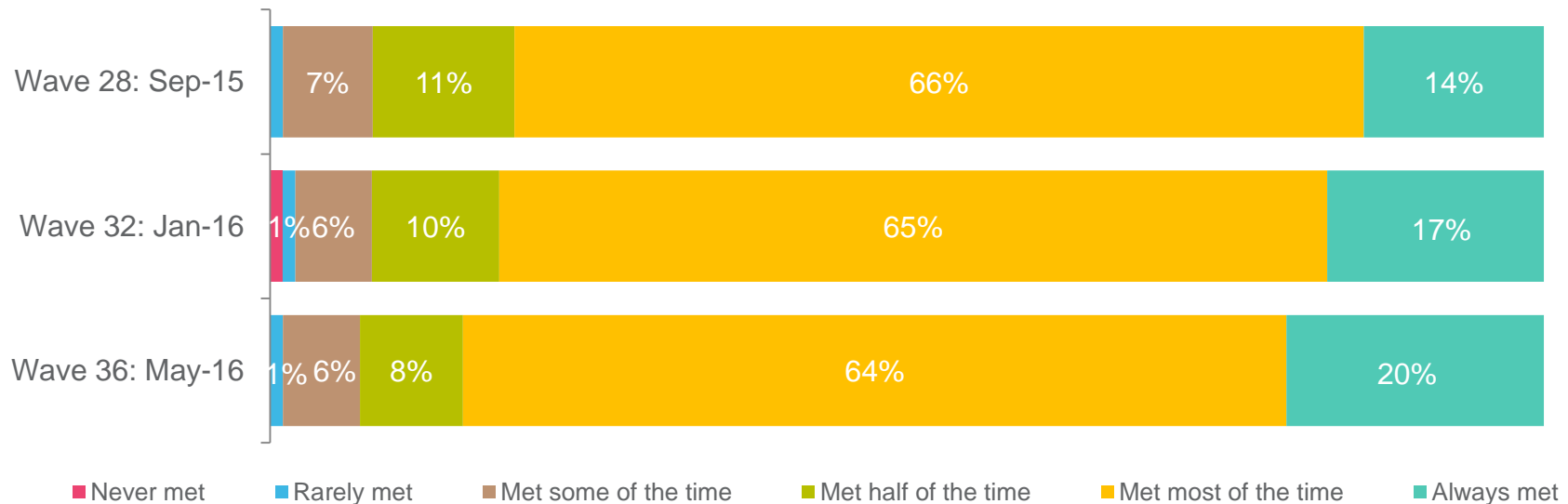


Capsicums are expected to remain fresh for nine days once purchased, which has increased this wave. The last three waves have seen an improvement in expectations of freshness, with an increase in freshness always being met.

Expected to stay fresh for **9.0 days**

- ▼ 8.2 days, Wave 28
- ▼ 8.0 days, Wave 32

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 28 N=319, Wave 32 N=308, Wave 36 N=306



Trends: Capsicums



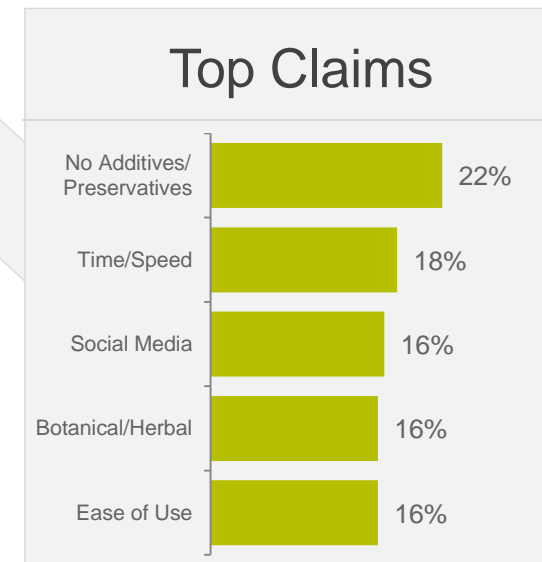
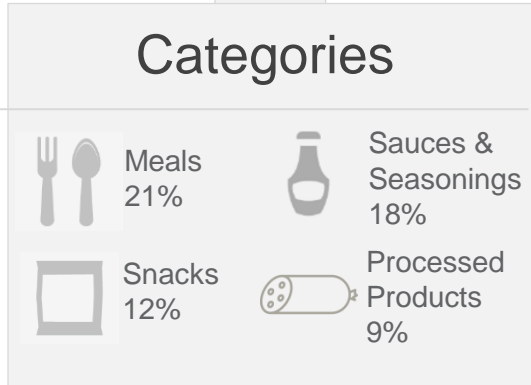
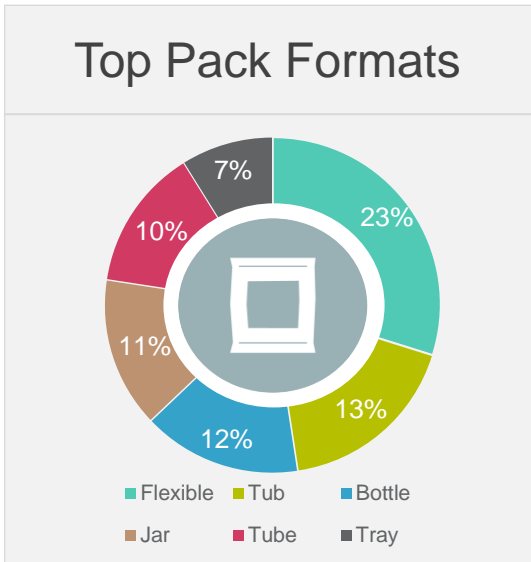
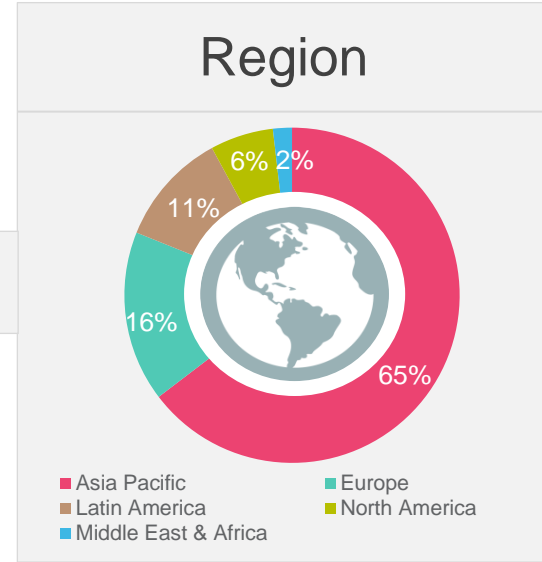
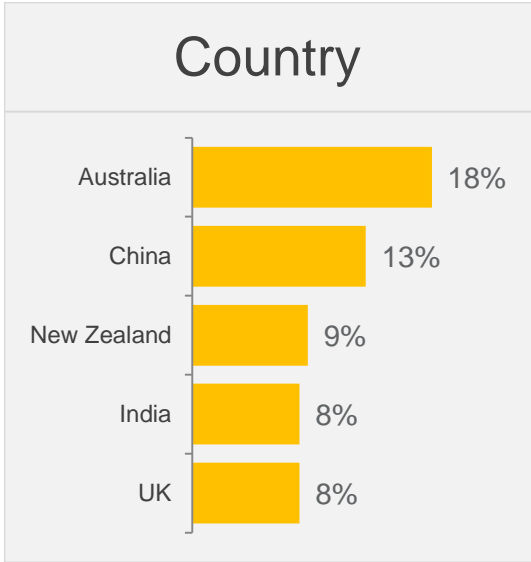
Capsicum Global NPDs.

February – May 2016

There were 164 products launched over the last three months that contained Capsicum as an ingredient. A large portion of these products were launched in Asia Pacific, Australia, China and New Zealand. New products were meals, sauces and snacks.



164 Global Launches





Capsicum Product Launches: Last 3 Months (February – May 2016) Summary

- There were 164 products launched globally in the last three months that contained capsicum as an ingredient.
- There were 29 products launched in Australia, the most launches of any country this wave.
- Top countries for launches were Australia (18%), China (13%), New Zealand (9%) and India (8%), with two thirds of products launched in the Asia Pacific region.
- Flexible packs (23%) and tubs (13%) were the most used forms of packaging over the last three months.
- Meals (21%) and sauces & seasonings (18%) were the main launch category for products containing capsicum.
- Product claims used were no additives/preservatives (22%), and time/speed (18%).
- The most innovative product was a Chili Shampoo from Mexico (examples of these can be found in the following pages).



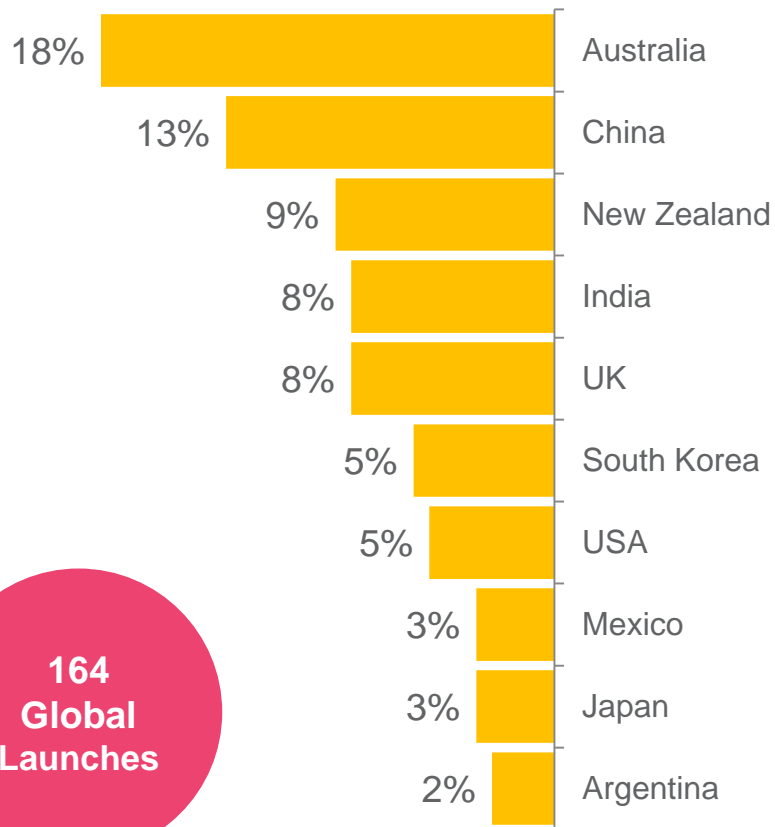
Source: Mintel (2016)



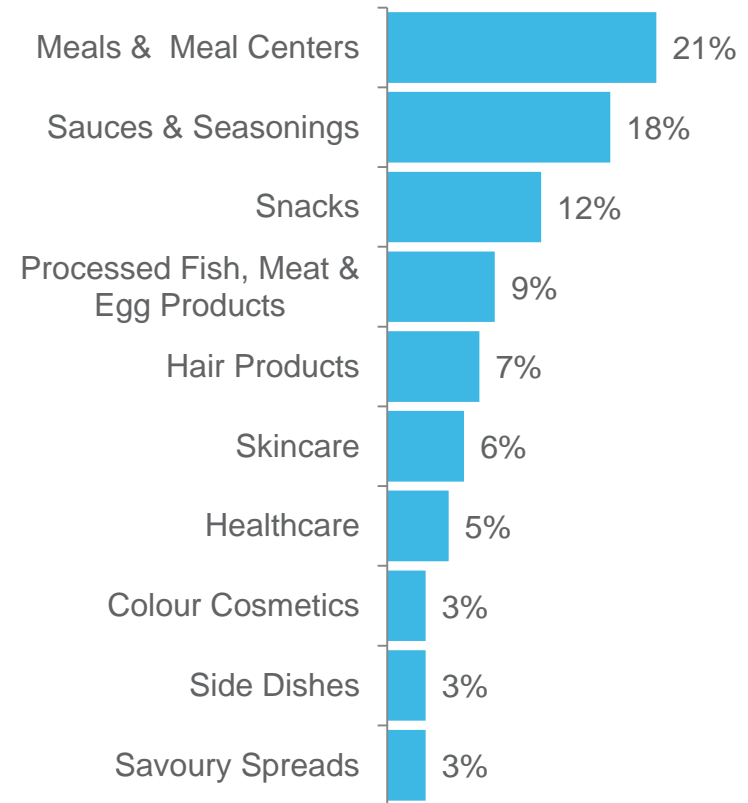


Australia had the greatest number of capsicum product launches over the last 3 months. Meals & meal centers, and sauces & seasonings were the main launch categories this wave.

Top Launch Countries



Top Launch Categories









164
Global
Launches










The main claims globally were no additives & preservatives and time/speed. Flexible packaging and tubs are primarily used for capsicum products.

Pack Formats Used

Global		Flexible	23%
		Tub	13%
		Bottle	12%
Asia Pacific		Flexible	28%
		Tub	19%
		Jar	13%

Top Claims Used

Global		No Additives/Preservatives	22%
		Time/Speed	18%
		Social Media	16%
Asia Pacific		No Additives/Preservatives	28%
		Ease of Use	22%
		Time/Speed	21%

»»»→ Innovative Capsicum Launches: L3M (February – May 2016)

Global Gourmet Bombay Bites Pizza Samosa (India)

Global Gourmet Bombay Bites Pizza Samosa is new to the range. These vegetarian and halal certified triangles filled with authentic pizza topping retail in a 240g pack containing 12 pieces, featuring the Facebook logo.



Claims:
Vegetarian, Halal, Social Media

Duoduo Hou Dan Dao Pickled Chilli Flavoured Brewed Quail Egg (China)

Duoduo Hou Dan Dao Pao Jiao Wei Lu An Chun Dan (Pickled Chilli Flavoured Brewed Quail Egg) is processed according to soaking, cooking and cooling procedures. This all natural product retails in a 120g pack containing individual units and featuring a QR code.



Claims:
All Natural Product

SkinVitals S + Slimming Pack (for Belly) (China)

SkinVitals S + Slimming Pack (for Belly) is formulated with: camellia sinensis leaf extract to protect skin against external harmful elements; ginkgo biloba leaf to promote blood circulation; and salicornia herbacea extract to eliminate fat for a slimmer finish.



Claims:
Botanical/Herbal, Long-Lasting*, Protects Against Elements*, Slimming*, Cleansing*

Tilda Family Favourites Golden Vegetable Basmati Rice (Ireland)

Tilda Family Favourites Golden Vegetable Basmati Rice has been reformulated with a tasty new recipe. It is said to be made with delicious natural ingredients and to be perfect with everything. The vegetarian product can be prepared in two minutes in a microwave or stir fried in four minutes. It contains no gluten, artificial flavourings, colours or preservatives, and retails in a 250g pack that features a recipe on the back.



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

»»» Innovative Capsicum Launches: L3M (February – May 2016)

Avon Care Chili Shampoo (Mexico)

Avon Care Chile Shampoo (Shampoo) is said to clean and leave a nice aroma. It is free of cocamide DEA and retails in a 750ml pack. Also available is Manzanilla Shampoo (Chamomile Shampoo) (750ml/49.99MXN). The cocamide DEA-free product is said to feature a nice aroma, and give shine to hair.



Claims:
N/A

Fresh 'n Freeze Capsicum (Pakistan)

Fresh 'n Freeze Capsicum is said to be highly nutritious, offers year round availability, is natural farm fresh best picked, and is BRC Food, HACCP and halal certified. The microwaveable, all natural product contains no artificial flavours or preservatives and retails in a 1kg freshness locked pack, featuring a QR code.



Claims:
No Additives/Preservatives, All Natural Product, Microwaveable, Halal

Pulmuone Korean Style Green Pepper Fried Dumplings (China)

Pulmuone Han Shi Qing Jiao Jian Jiao (Korean Style Green Pepper Fried Dumplings) are made with antibiotics-free pork, and are free from preservatives, artificial colourings and MSGs. This product is said to be mild spicy and crispy, and retails in a 300g environmental friendly pack featuring a QR code.



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

Three Tigers Chilli Flavoured Rice Crackers (UK)

Three Tigers Chilli Flavoured Rice Crackers have been repackaged with a new look. This premium authentic Asian snack is suitable for vegetarians and retails in a 200g pack.



Claims:
Vegetarian, Premium

»»» Innovative Capsicum Launches:

L3M (February – May 2016)

Relish Spanish Tomato Potato Chips (India)

Relish Spanish Tomato Potato Chips are hand sliced and hand cooked. This product is suitable for vegetarians and retails in a 75g pack bearing the Planet Earth logo.



Claims:
Vegetarian

Nilgiri's 1905 Chilli Capsicum Cheese Spread (India)

Nilgiri's 1905 Chilli Capsicum Cheese Spread is now available in a redesigned 180g pack. This product is suitable for vegetarians.



Claims:
Vegetarian

Breakfast Best Original Breakfast Sausage Patties (USA)

Breakfast Best Original Breakfast Sausage Patties are made using premium cuts of pork and a blend of spices. They are free from gluten and lactose and contain 220 calories per serving. This USDA certified product retails in a 12-oz. pack.



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

Fu-Song Original Flavoured Pickled Capsicum Frutescens (Taiwan)

Fu-Song Original Flavoured Pickled Capsicum Frutescens are made from premium ingredients and suitable for dressing, steaming fish or spicy soup base. The vegan product is free from preservatives, artificial colour and flavours, and retails in a 380g jar.



Claims:
No Additives/Preservatives, Premium, Vegan, No Animal Ingredients



Australian Innovative Capsicum Launches: L3M (February – May 2016)

Five Brothers Pour Over Sauce Christophe's Char Grilled Vegetables Sauce



Black Swan Classic Favourite Dips



Thins Lime with a Hint of Chilli Thin & Crispy Potato Chips



Cucina Del Nonno Vegetarian Lasagna



Bulla Real Dairy Tomato & Basil Flavoured Spreadable Cheese



Heinz Vegetable, Lentil & Chilli Soup with Smoked Paprika



Yarra Valley Preserves Roasted Capsicum & Chilli Relish



Tassal Salmon & Beans



A close-up photograph of numerous fresh Brussels sprouts, showing their characteristic layered, green leaves and small, rounded heads. The sprouts are densely packed and fill the entire background of the slide.

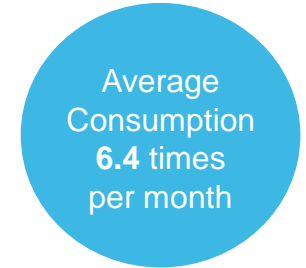
Brussels Sprouts.



Average purchase has slightly declined this wave, but consumption has increased. Coles and Woolworths remained the key locations for purchase. There was a noticeable increase in purchase from specialist vegetable retailers this wave.

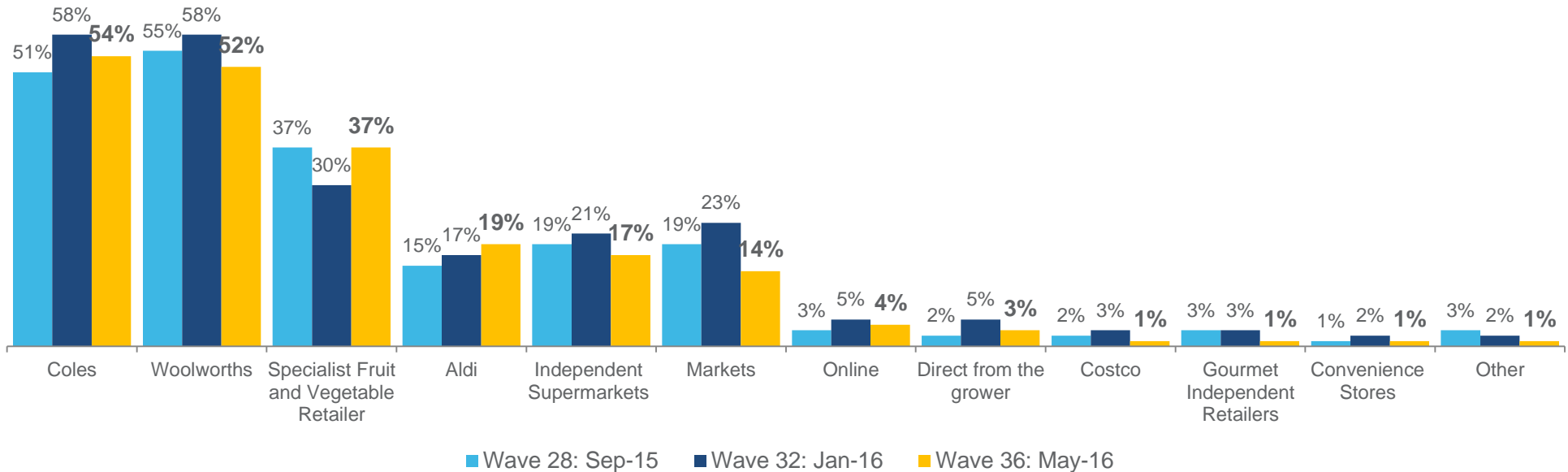


- ▲ 3.3 times, Wave 28
- ▲ 3.4 times, Wave 32



- 6.4 times, Wave 28
- ▼ 5.9 times, Wave 32

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 28 N=268, Wave 32 N=231, Wave 36 N=302



Average Spend and Price Sensitivity



Average weight of purchase

The average consumer typically purchased **0.6kg** of Brussels Sprouts in May 2016, slightly lower than the previous wave.

- ▲ 0.7kg, Wave 28
- ▲ 0.7kg, Wave 32



Recalled last spend

The average recalled last spend was **\$3.60**, which has declined this wave.

- ▲ \$4.00, Wave 28
- ▲ \$4.10, Wave 32



Value for money

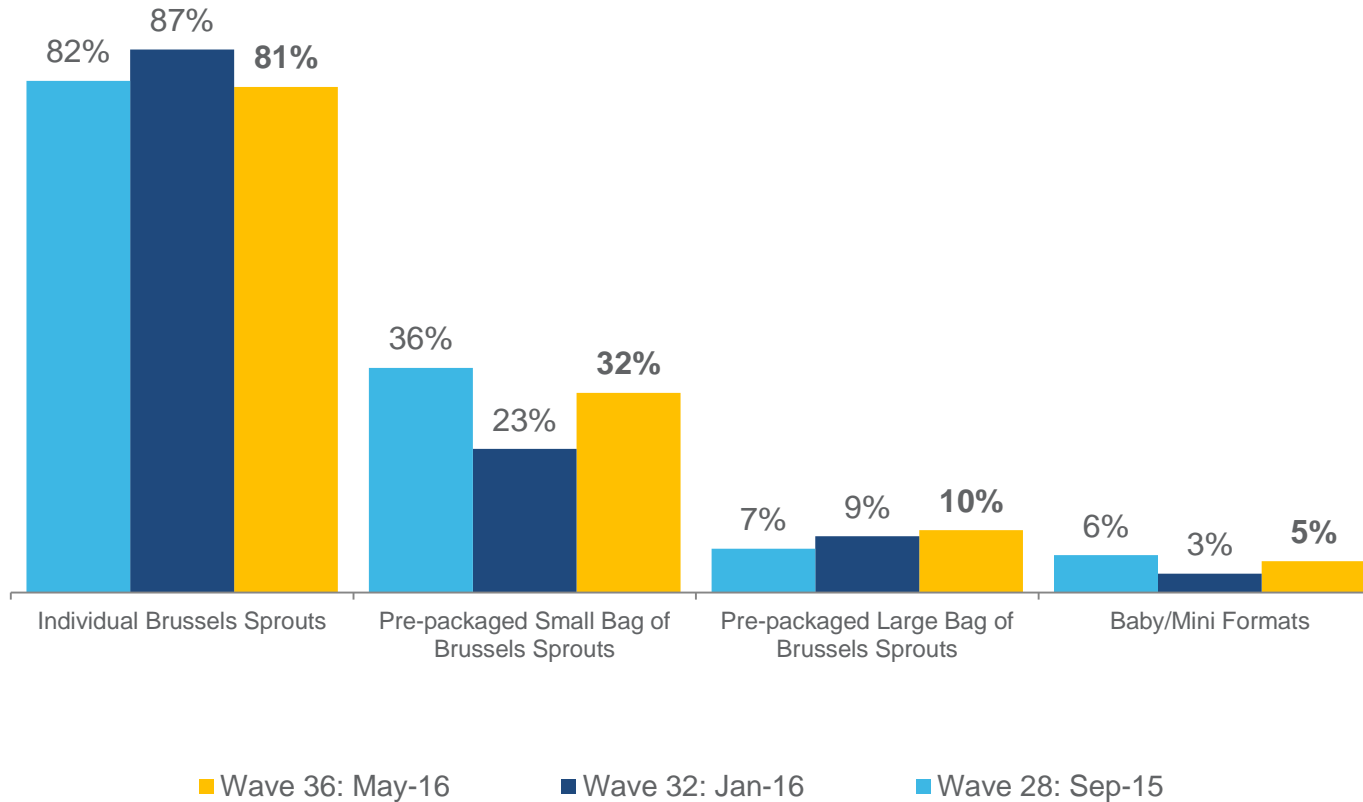
On average, consumers perceived Brussels Sprouts to be good value for money (**6.6/10**), which has increased in May 2016.

- ▼ 6.4/10, Wave 28
- ▼ 6.1/10, Wave 32

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 28 N=268, Wave 32 N=231, Wave 36 N=302

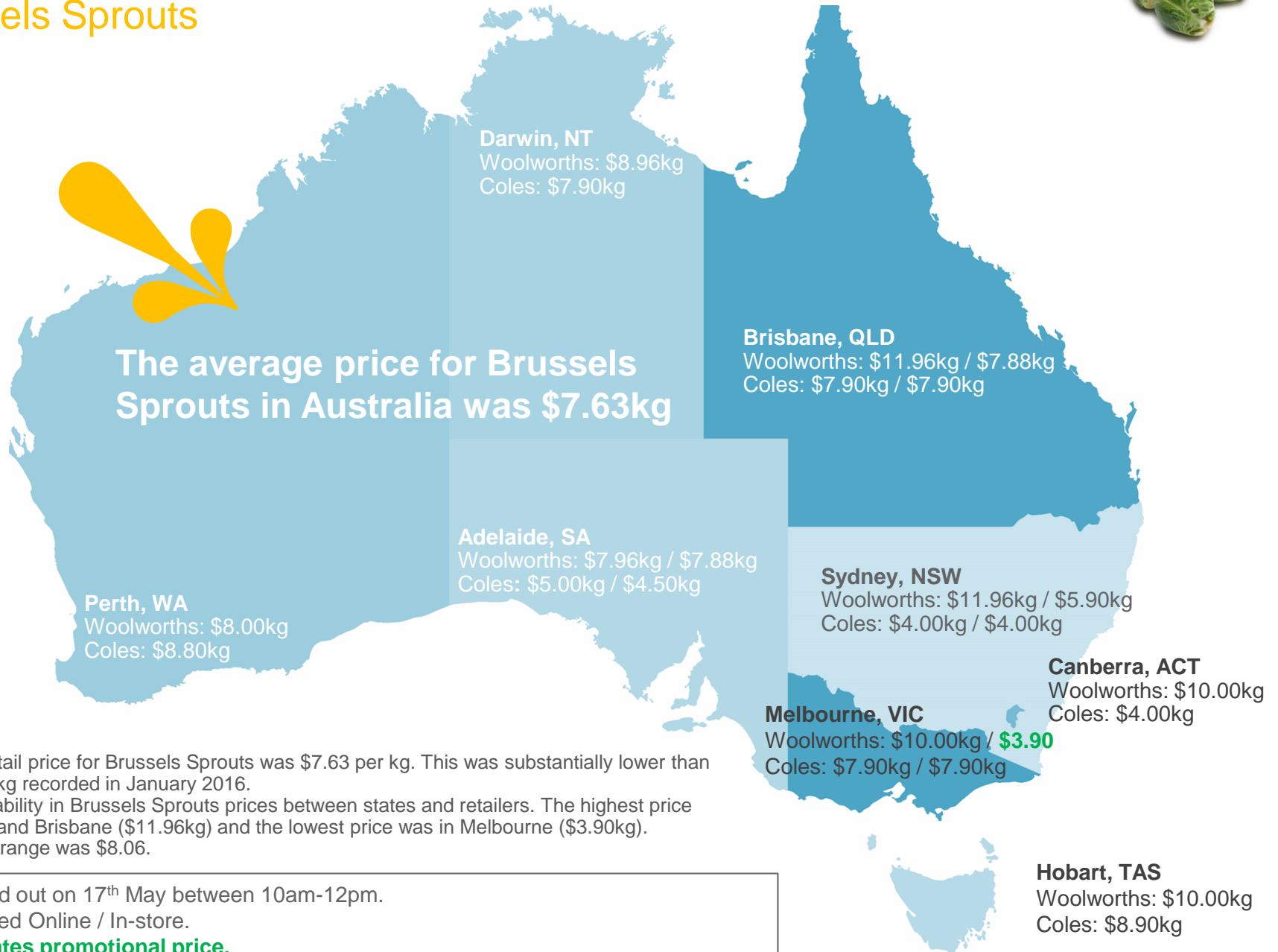


Individual Brussels Sprouts were the main format purchased, consistent with previous waves. The current wave saw an increase in purchase of pre-packaged small bags of Brussels Sprouts.



Online and In-store Commodity Prices

Brussels Sprouts



- The average retail price for Brussels Sprouts was \$7.63 per kg. This was substantially lower than the \$10.93 per kg recorded in January 2016.
- There was variability in Brussels Sprouts prices between states and retailers. The highest price was in Sydney and Brisbane (\$11.96kg) and the lowest price was in Melbourne (\$3.90kg).
- The retail price range was \$8.06.

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



Spontaneous Awareness & Purchase

82% of consumers could not recall any type of Brussels Sprouts.

Those that mentioned a type of Brussels Sprouts recalled the colour green.

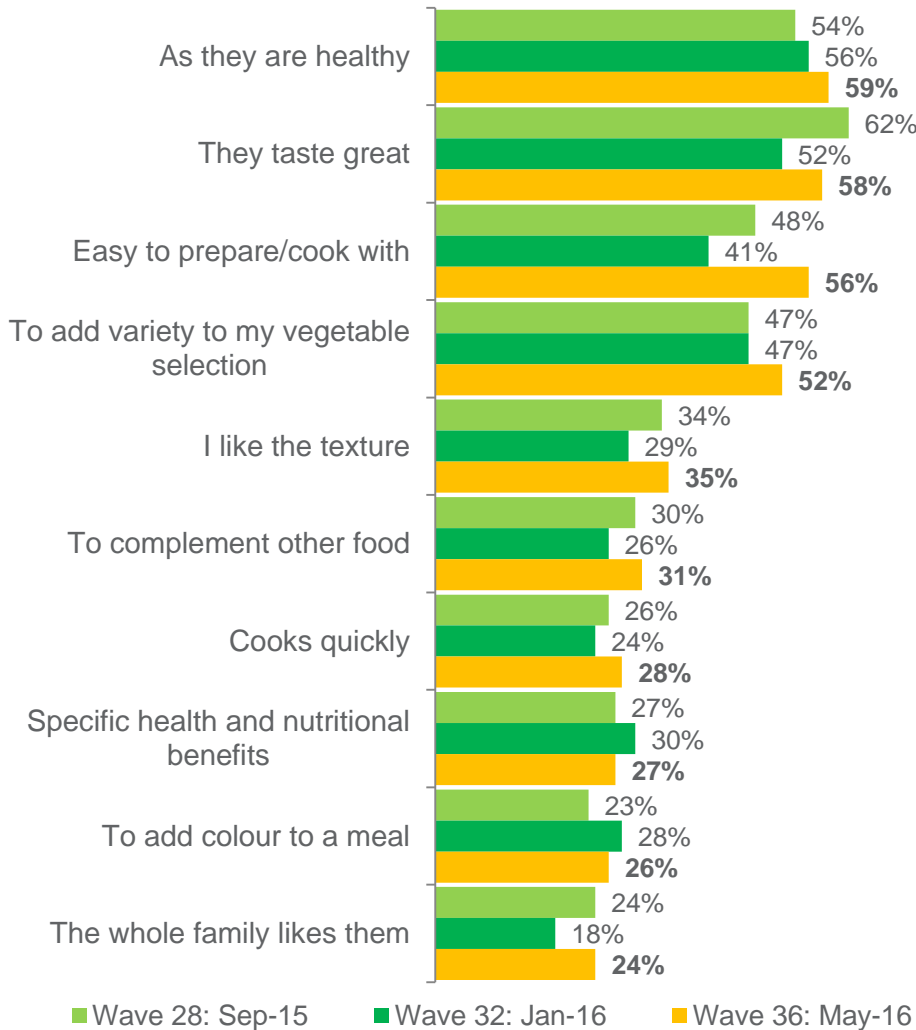




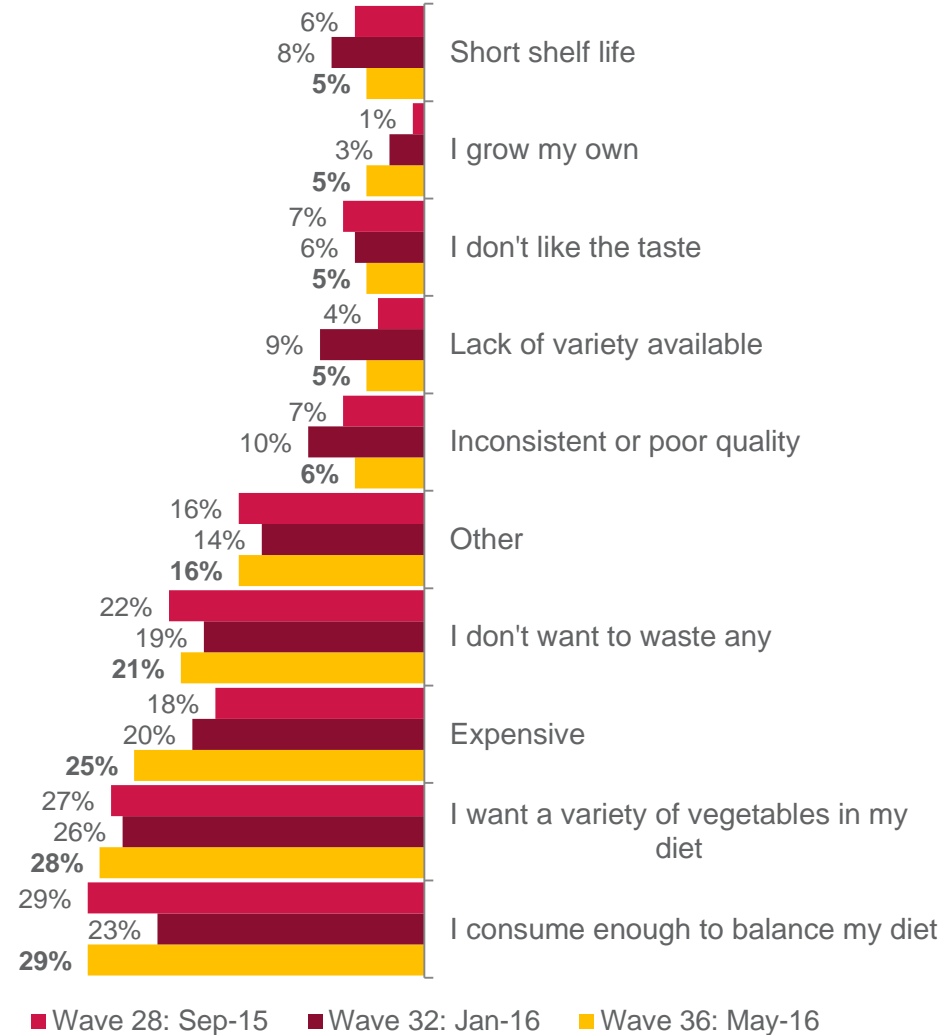
The main triggers for purchase are based around health and taste. In contrast, the barriers to purchase for consumers are already consuming enough to balance their diet and wanting a variety of vegetables. There has been a noticeable increase in ease of preparation as a reason for purchase.



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 28 N=268, Wave 32 N=231, Wave 36 N=302



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

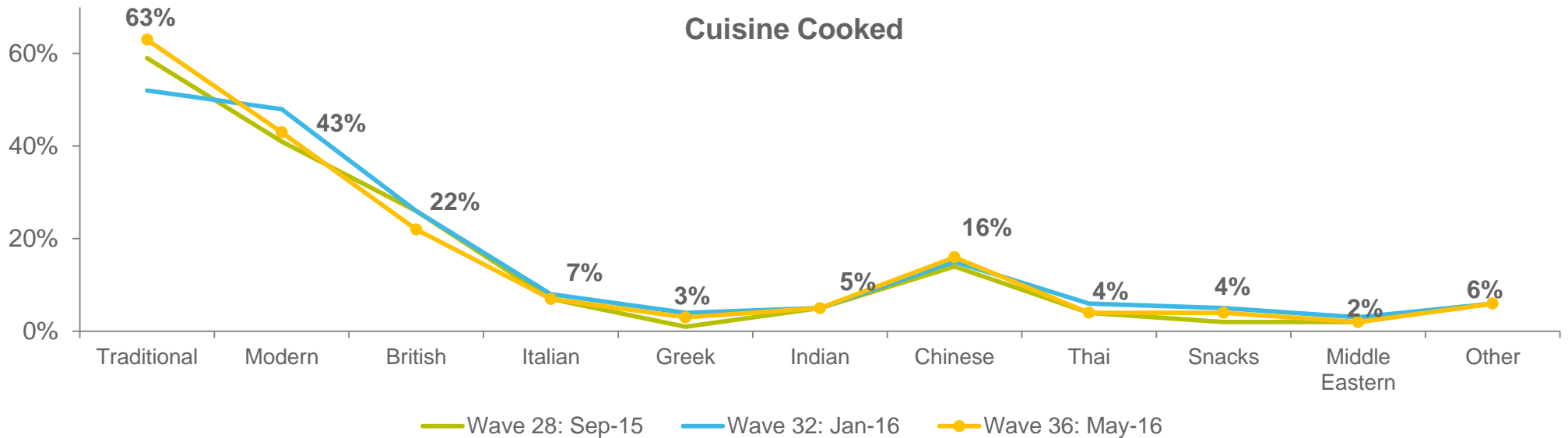
Traditional Australian cuisine was the most common cooking style. Cuisine choice has remained consistent across previous waves.

Top 5 Consumption Occasions

	Wave 32	Wave 36
Dinner	66%	73%
Family Meals	57%	50%
Weekday Meals	43%	46%
Weekend Meals	33%	38%
Quick Meals	26%	21%

11% used Brussels Sprouts when cooking a new recipe

▼ 10%, Wave 32



Q10. What cuisines do you cook/consume that use <commodity> ?
 Q11. Which of the following occasions do you typically consume/use <commodity> ?
 Sample Wave 28 N=268, Wave 32 N=231, Wave 36 N=302

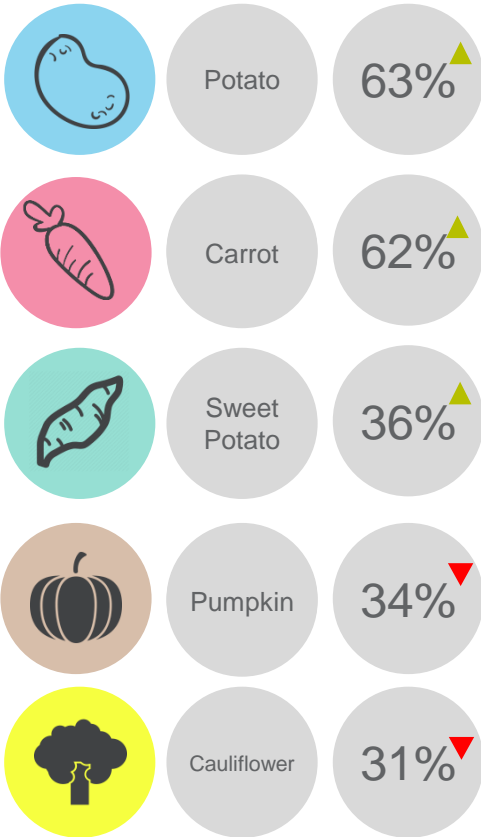


▼ : Indicates LOWER score than current wave.
 ▲ : Indicates HIGHER score than current wave.



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

Accompanying Vegetables

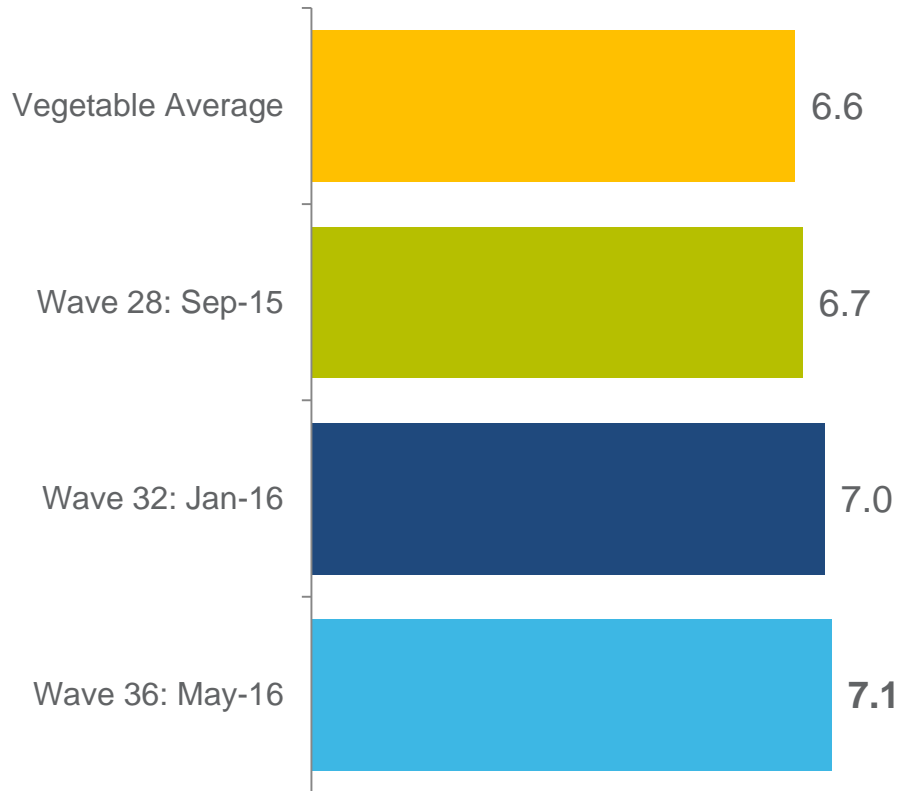


Top 10 Cooking Styles			
	Wave 28	Wave 32	Wave 36
Steaming	60%	58%	55%
Boiling	42%	42%	40%
Stir frying	23%	21%	24%
Microwave	18%	19%	20%
Sautéing	15%	16%	16%
Frying	12%	13%	14%
Roasting	16%	15%	12%
Slow Cooking	10%	10%	10%
Soup	7%	9%	9%
Baking	9%	10%	7%

Q9. How do you typically cook <commodity> ?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
Sample Wave 28 N=268, Wave 32 N=231, Wave 36 N=302



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



Q14. When purchasing <commodity>, how important is Provenance to you?
Mean scores out of 10.
Sample Wave 28 N=268, Wave 32 N=231, Wave 36 N=302

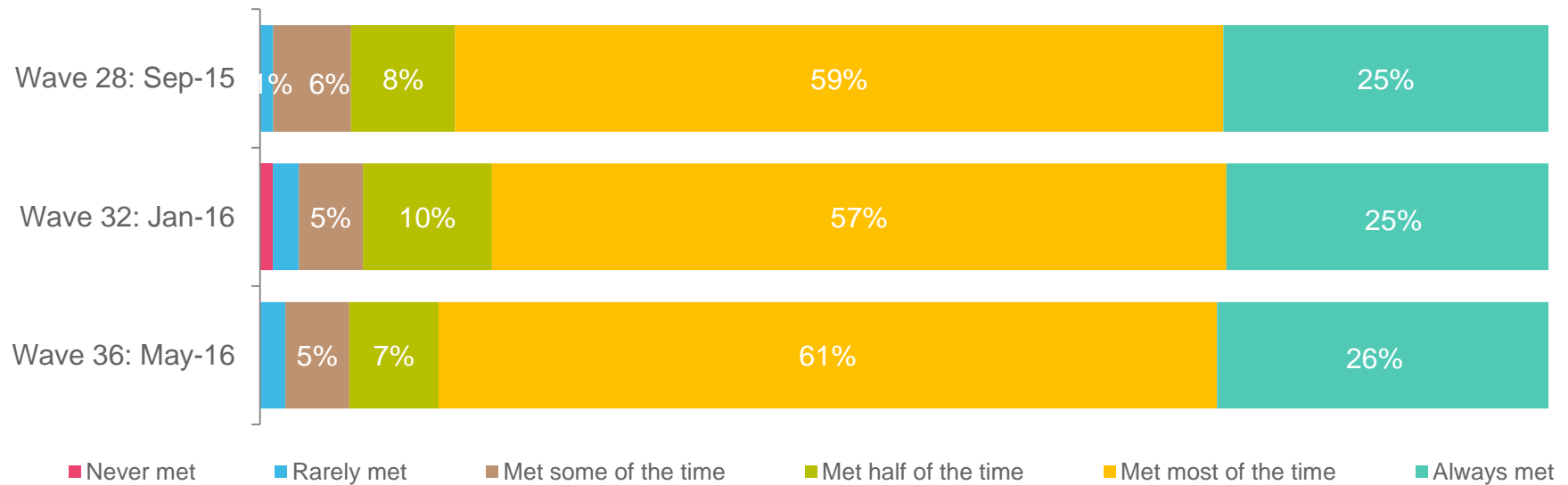


Consumers expect Brussels Sprouts to stay fresh for nine days once purchased, with these expectations being met most of the time.

Expected to stay fresh for **9.2 days**

- ▼ 8.8 days, Wave 28
- ▼ 8.8 days, Wave 32

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 28 N=268, Wave 32 N=231, Wave 36 N=302



Trends: Brussels Sprouts

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



Innovative Brussels Sprouts Launches: L3M (February – May 2016)

Dole Crunchy Greens Sunflower Seeds Wild Garlic Salad (Sweden)

Dole Crunchy Greens Sunflower Seeds Wild Garlic Salad is described as a satisfying, green salad with crispy lettuce and four varieties of cabbage, and contains 250g of salad, 50g of wild garlic dressing and 20g of sunflower seeds. The ready to eat salad is washed three times in drinking water and is made with first class ingredients. The product retails in a 320g pack featuring the Facebook logo.



Claims:
Ease of Use, Social Media

Green Giant Steamers Seasoned Brussels Sprouts with Sea Salt & Cracked Pepper (USA)

Green Giant Steamers Seasoned Brussels Sprouts with Sea Salt & Cracked Pepper have been repackaged in a new pack. They are microwavable and are said to be easy and ready in just minutes. The product retails in an 11-oz. pack.



Claims:
Microwaveable, Time/Speed, Ease of Use

ICA Gott Liv Grönhydrater Vegetable Hash of Brussels Sprouts, Purple Carrot, Red Cabbage and Red Onion (Sweden)

ICA Gott Liv Grönhydrater Vegetarisk Pytt (Vegetable Hash of Brussels Sprouts, Purple Carrot, Red Cabbage and Red Onion) is new to the range. It is described as green hydrates rich in vitamin C. The vegetable mix is said to be green and tasty, and has a frying time of 12-14 minutes. The product retails in a 380g pack.



Claims:
N/A

Renaissance Food Group Brussels & Red Potato Medley (USA)

Renaissance Food Group Brussels & Red Potato Medley have been repackaged and feature a new design. The product retails in a 12-oz. pack.



Claims:
Ease of Use



Spinach.



On average, spinach is purchased four times per month, and is consumed nine times per month, noticeably declining this wave.

Spinach is predominantly purchased through mainstream retailers.

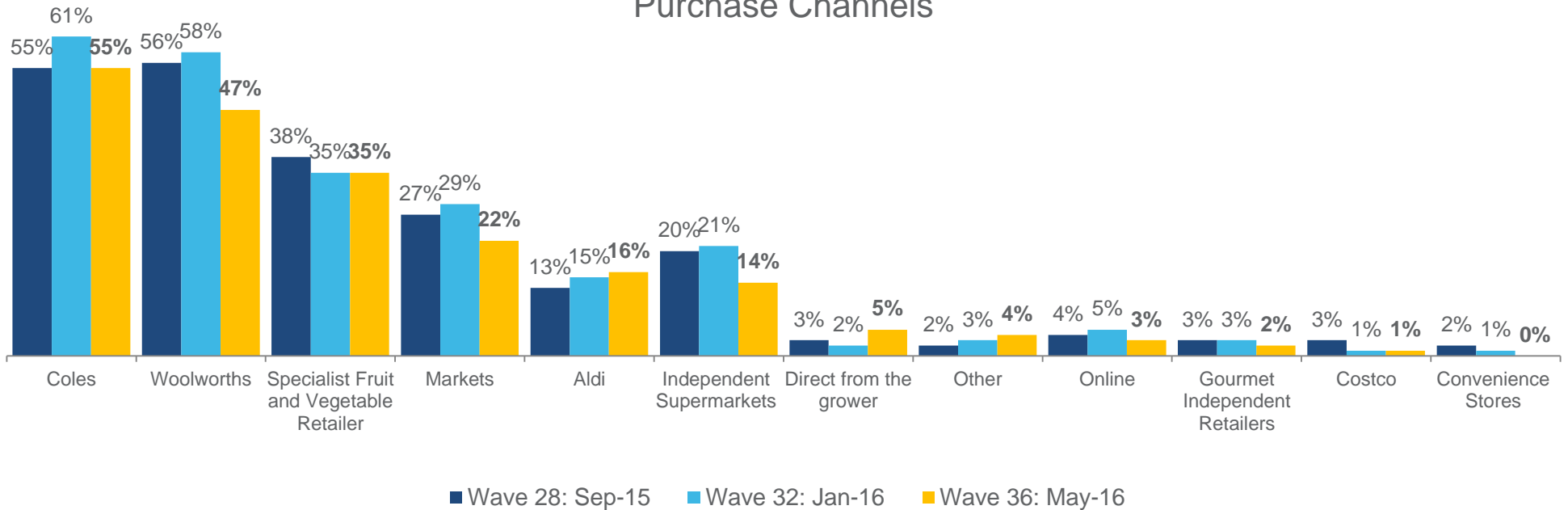


- ▲ 5.2 times, Wave 28
- ▲ 4.6 times, Wave 32



- ▲ 10.6 times, Wave 28
- ▲ 11.1 times, Wave 32

Purchase Channels



Q1. On average, how often do you purchase Spinach (English and baby)?
 Q2. On average, how often do you consume Spinach (English and baby)?
 Q5. From which of the following channels do you typically purchase Spinach (English and baby)?
 Sample Wave 28 N=308, Wave 32 N=305, Wave 36 N=300



Average Spend and Price Sensitivity



Average weight of purchase

The average consumer typically purchases **0.5kg** of spinach, consistent with the previous waves.

- 0.5kg, Wave 28
- 0.5kg, Wave 32



Recalled last spend

Recalled last spend on spinach is **\$3.40**, which has slowly declined over the last three waves.

- ▲ \$3.80, Wave 28
- ▲ \$3.60, Wave 32



Value for money

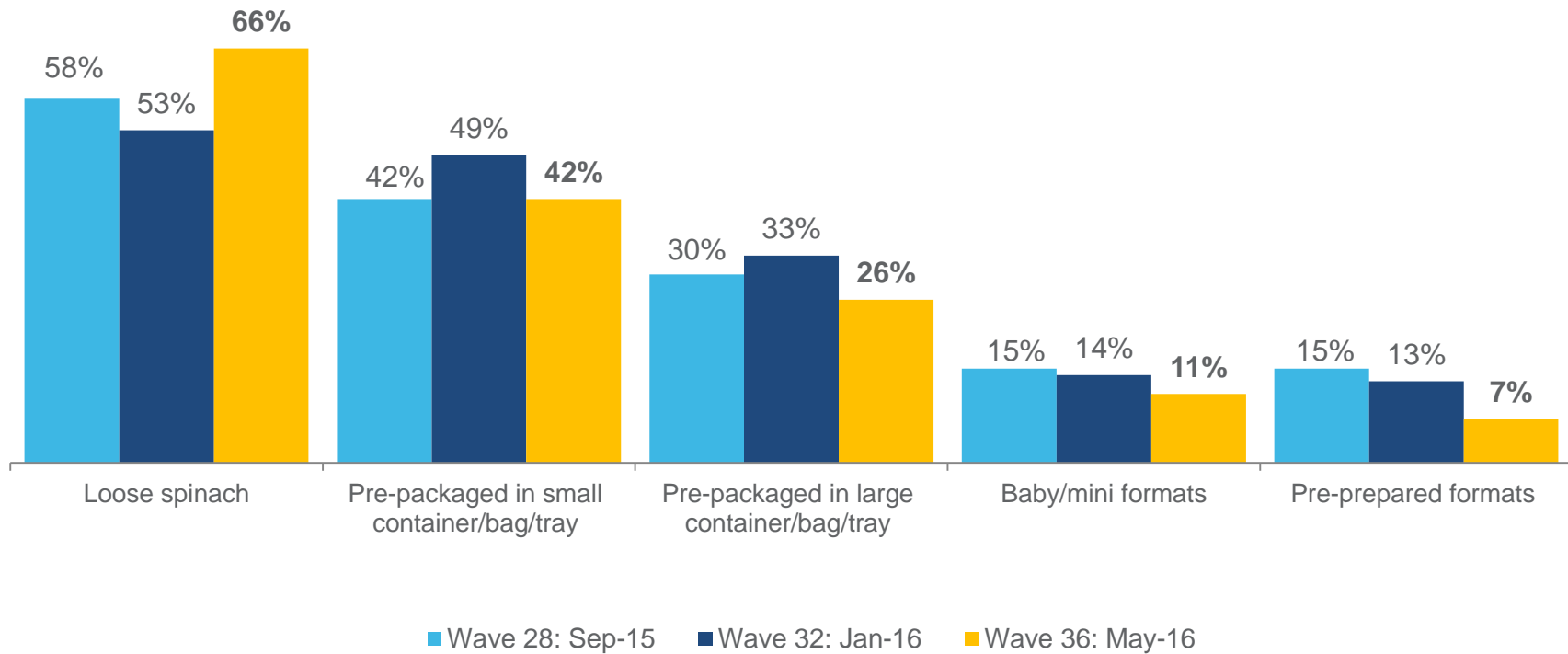
Consumers perceive spinach to be good value for money (**6.8/10**), which is noticeably higher than the previous waves.

- ▼ 6.4/10, Wave 28
- ▼ 6.2/10, Wave 32

Q3. How much Spinach do you typically purchase when you shop for it?
 Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
 Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
 Sample Wave 28 N=308, Wave 32 N=305, Wave 36 N=300



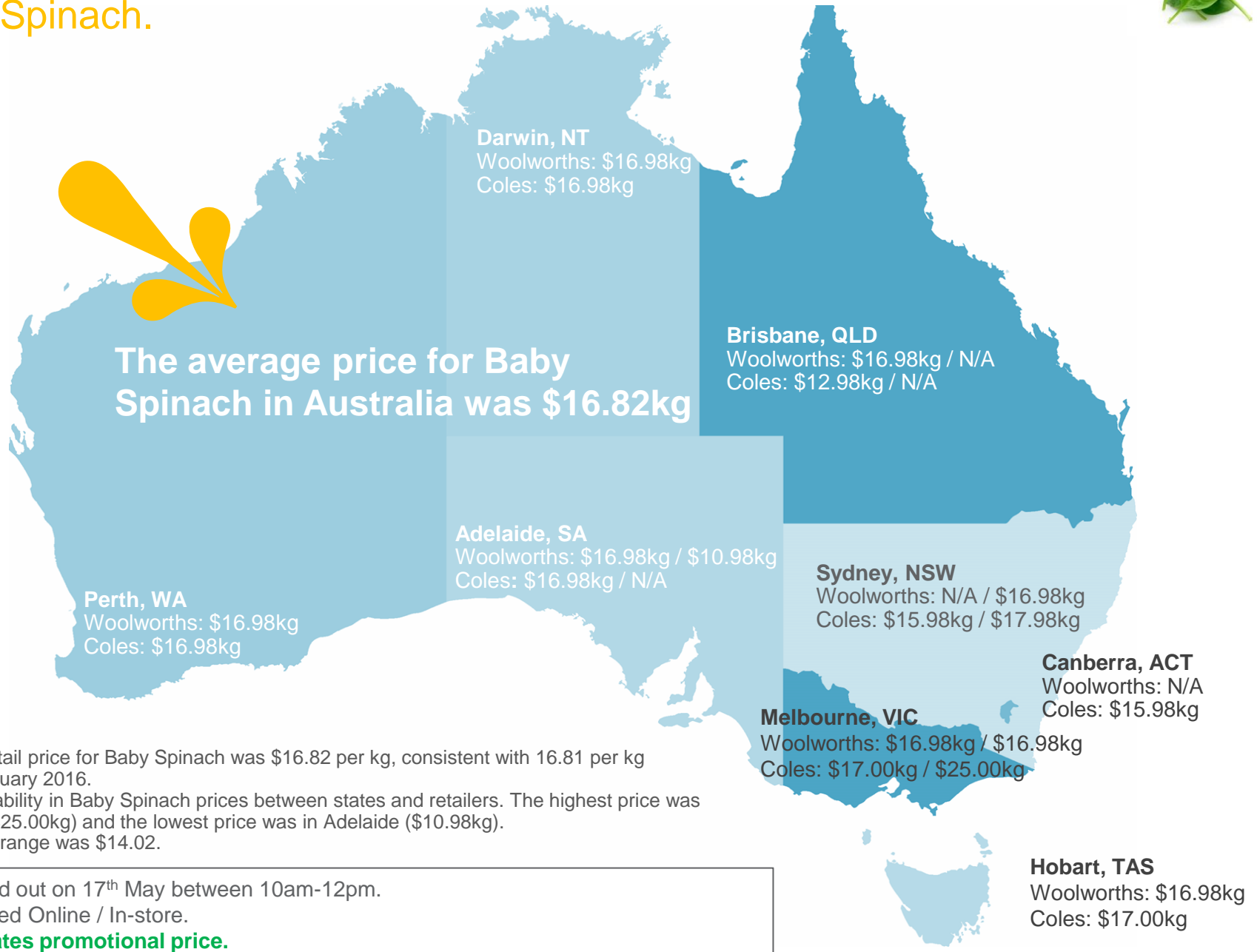
Loose spinach and pre-packaged small bags are the most common purchase formats, consistent with the previous waves.



Q4b. In what fresh formats do you typically purchase Spinach (English and baby)?
Sample Wave 28 N=308, Wave 32 N=305, Wave 36 N=300

Online and In-store Commodity Prices

Baby Spinach.

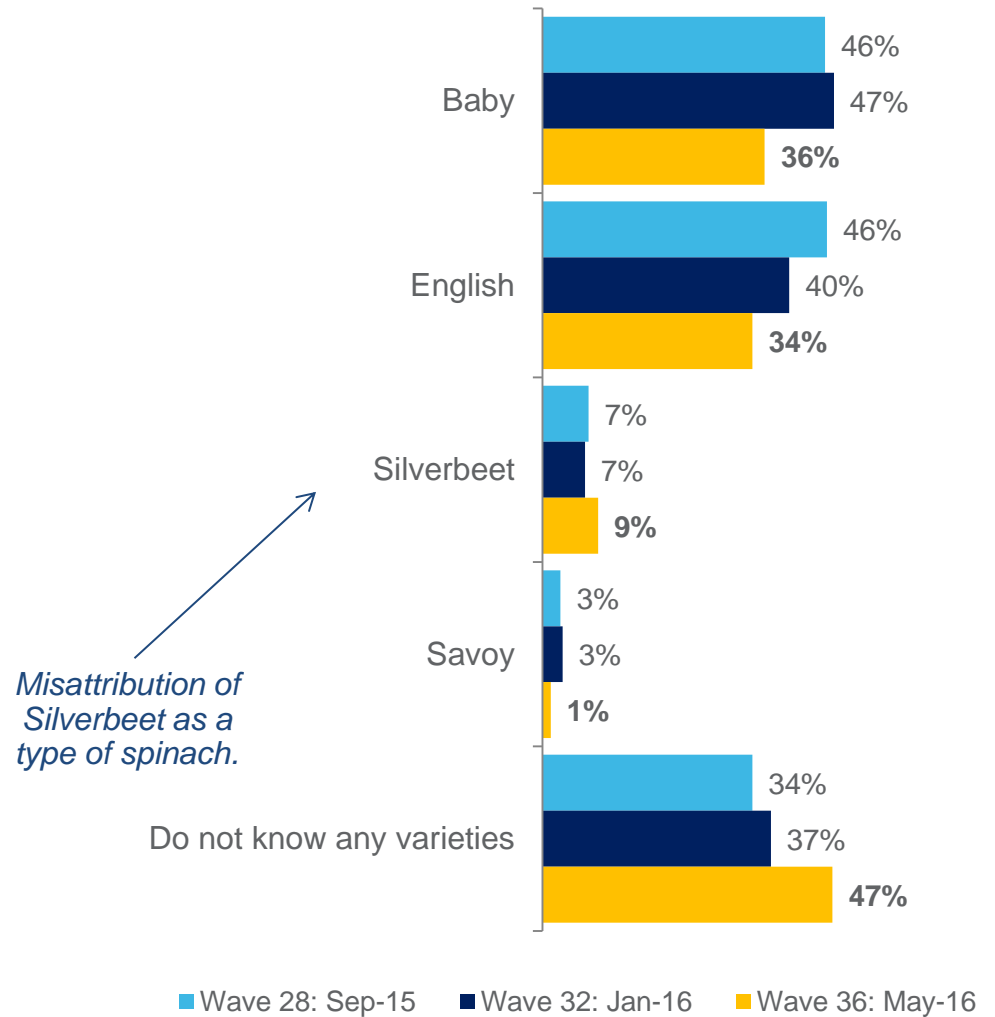


- The average retail price for Baby Spinach was \$16.82 per kg, consistent with 16.81 per kg recorded in January 2016.
- There was variability in Baby Spinach prices between states and retailers. The highest price was in Melbourne (\$25.00kg) and the lowest price was in Adelaide (\$10.98kg).
- The retail price range was \$14.02.

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



Nearly half of consumers could not recall a type of spinach this wave, which has continued to increase over the last three waves. Baby and English were the most recalled types of spinach.

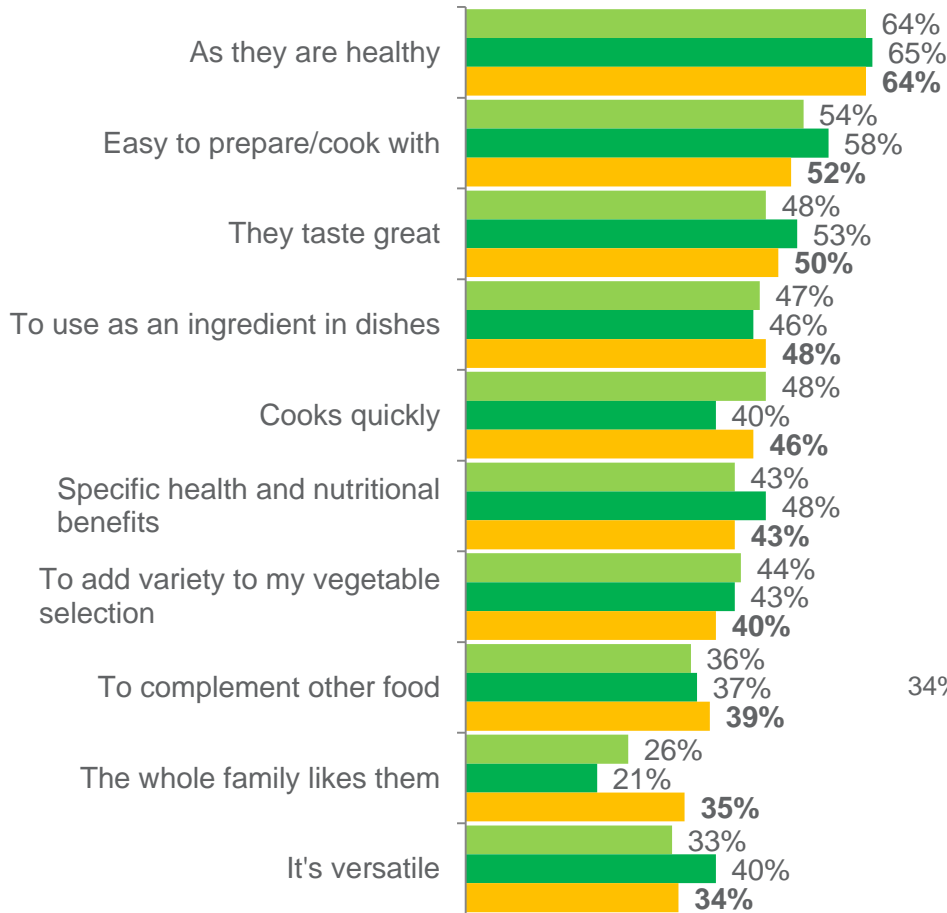


Q6a. What varieties of Spinach are you aware of? (unprompted)
 Sample Wave 28 N=308, Wave 32 N=305, Wave 36 N=300



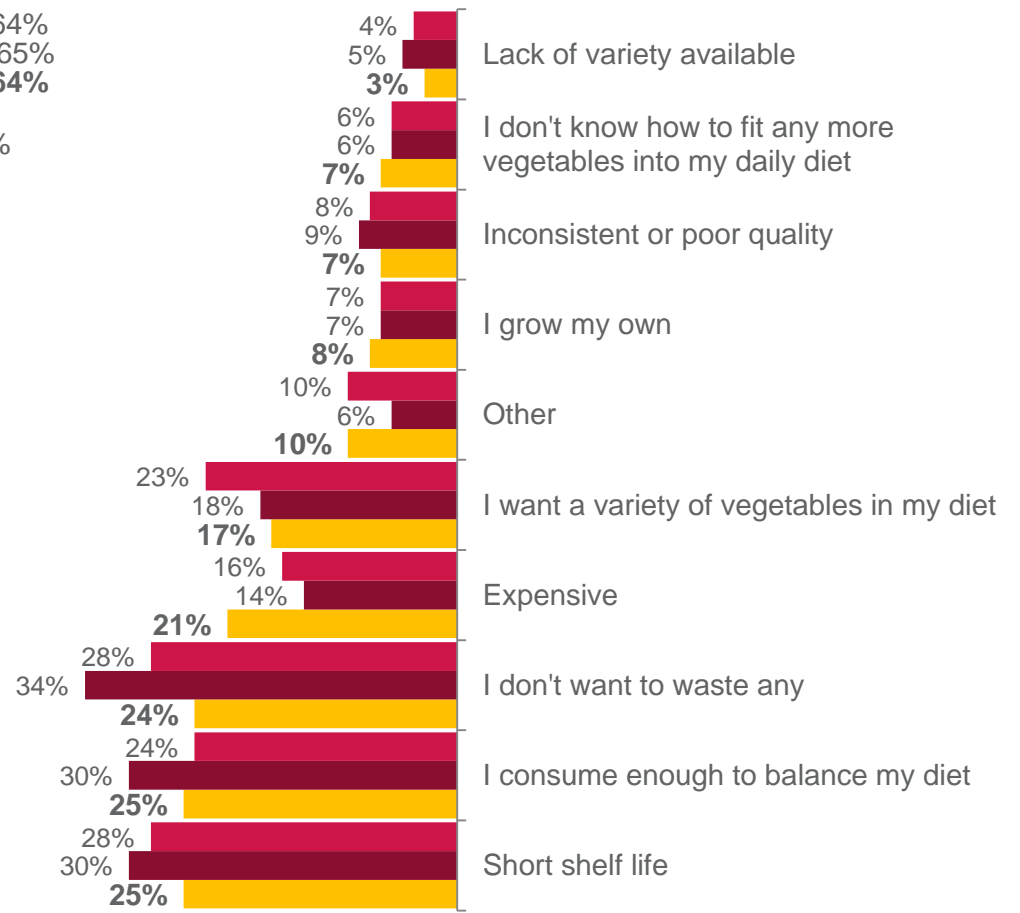
The key drivers of purchase for spinach are related to health, ease of preparation and taste. In contrast, short shelf life and not wanting to waste any are the key barriers to purchase.

Triggers



■ Wave 28: Sep-15 ■ Wave 32: Jan-16 ■ Wave 36: May-16

Barriers



■ Wave 28: Sep-15 ■ Wave 32: Jan-16 ■ Wave 36: May-16

Q7. Which of the following reasons best describes why you purchase Spinach (English and baby)?
Q8. Which reason best describes why you don't buy Spinach (English and baby) more often?
Sample Wave 28 N=308, Wave 32 N=305, Wave 36 N=300



Top 5 Consumption Occasions

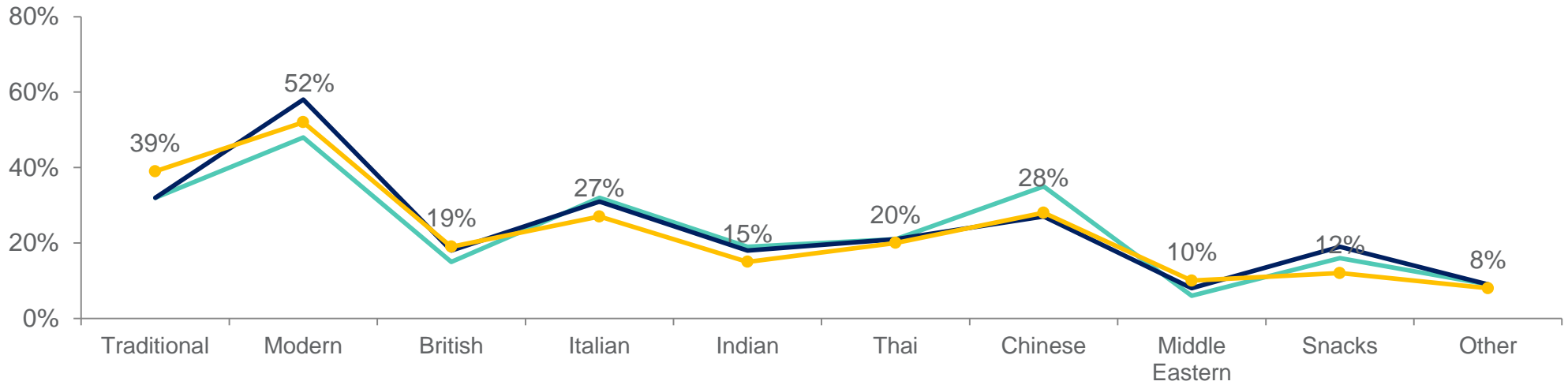
Australian, Chinese and Italian cuisines are popular for spinach dishes. Consistent with the past wave, meal occasions tend to occur during dinner.

	Wave 32	Wave 36
Dinner	71%	66%
Family Meals	54%	51%
Weekday Meals	52%	45%
Lunch	50%	44%
Quick Meals	57%	40%

17% used spinach when cooking a new recipe

▲ 19%, Wave 32

Typical Cuisine Cooked



— Wave 28: Sep-15 — Wave 32: Jan-16 — Wave 36: May-16

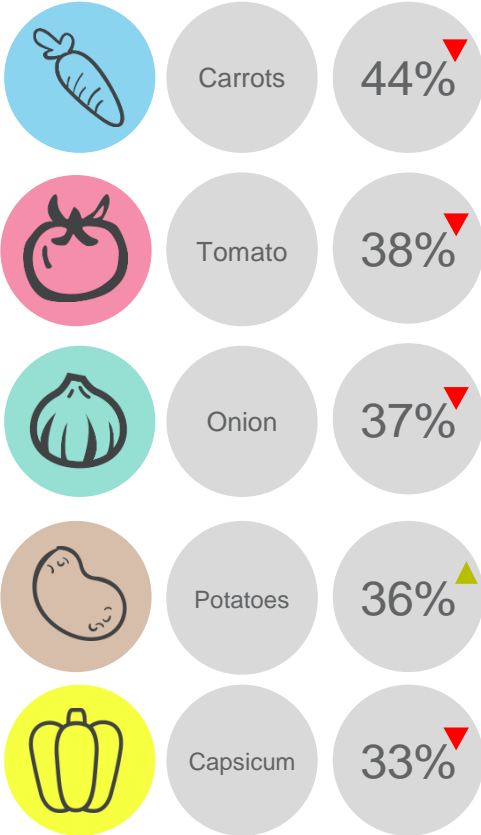
← Australian → ← European → ← Asian → ← Other Cuisines →

Q10. What cuisines do you cook/consume that use Spinach (English and baby)?
Q11. Which of the following occasions do you typically consume/use Spinach (English and baby)?
Sample Wave 28 N=308, Wave 32 N=305, Wave 36 N=300



Consumers prefer to use spinach mainly with carrots, tomatoes and onions. Spinach is generally stir fried, with a significant decline in eating spinach raw this wave.

Accompanying Vegetables

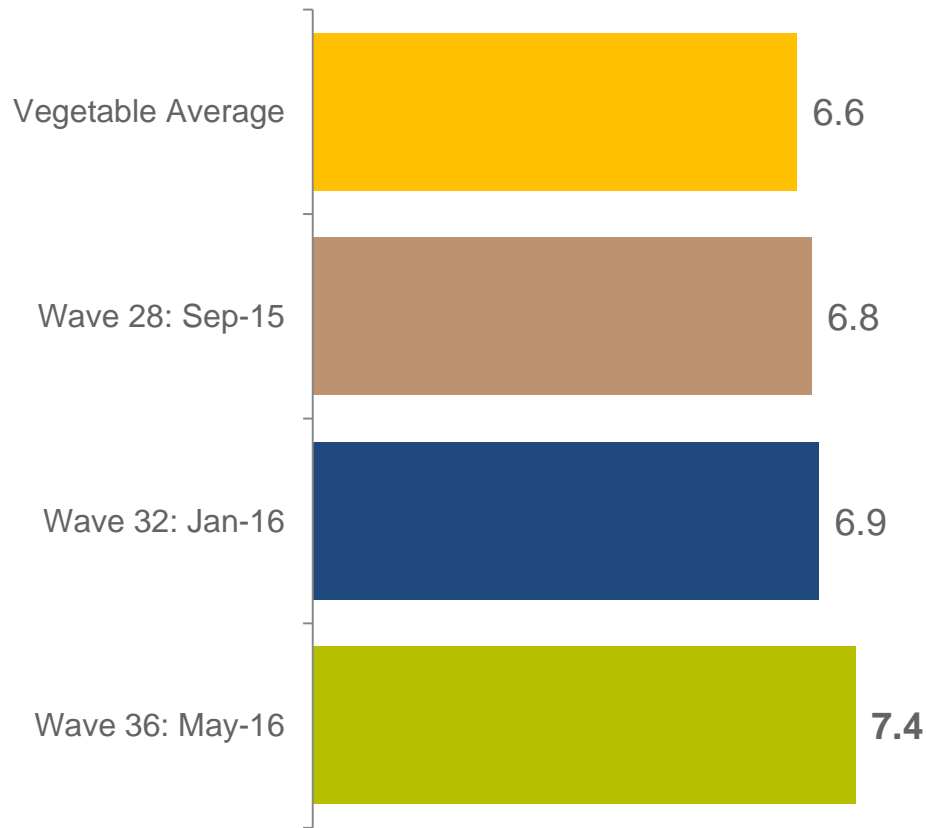


Top 10 Cooking Styles			
	Wave 28	Wave 32	Wave 36
Stir frying	54%	51%	47%
Raw	47%	57%	41%
Steaming	32%	36%	40%
Sautéing	30%	27%	27%
Soup	18%	16%	19%
Boiling	13%	16%	18%
Frying	14%	12%	13%
Slow Cooking	8%	8%	10%
Microwave	7%	7%	9%
Baking	12%	12%	7%

Q9. How do you typically cook Spinach (English and baby)?
Q10a. And when are you serving Spinach (English and baby) which of the following do you also serve together with this?
Sample Wave 28 N=308, Wave 32 N=305, Wave 36 N=300



Importance of provenance has noticeably increased this wave. Knowing that spinach is grown in Australia is highly important provenance information for consumers.



Q14. When purchasing Spinach (English and baby), how important is Provenance to you?
Q15. And when purchasing Spinach (English and baby), how important is that it is grown in Australia?
Sample Wave 28 N=308, Wave 32 N=305, Wave 36 N=300

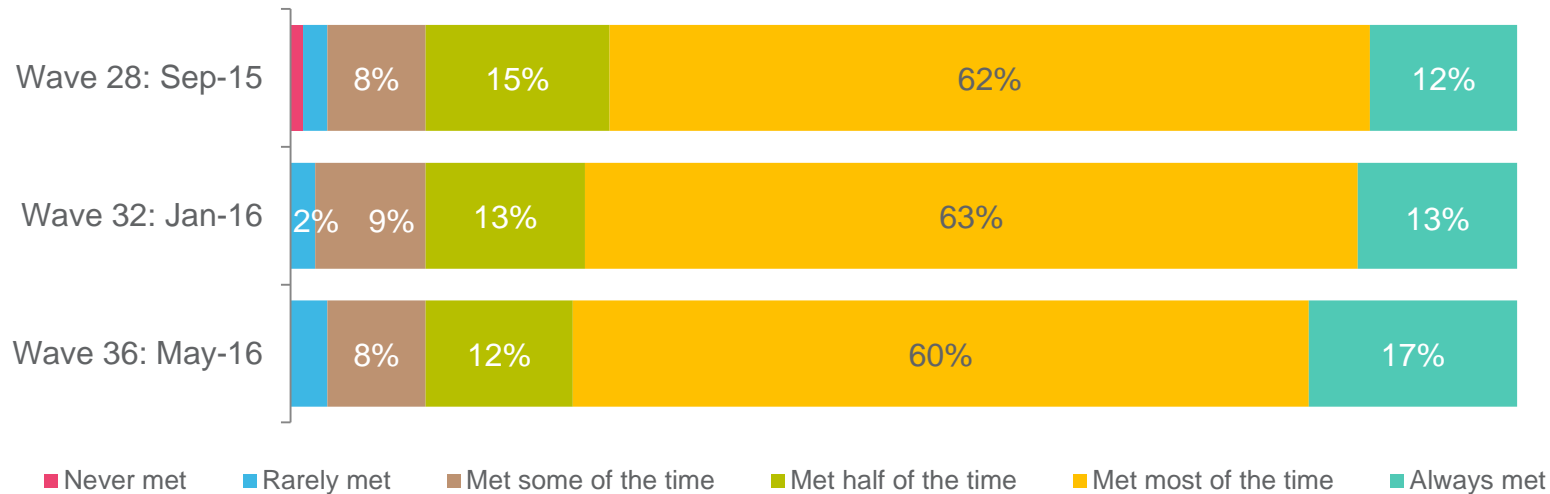


Consumers expect spinach to remain fresh for just under a week once purchased. Freshness expectations of spinach always being met has increased since September 2015.

Expected to stay fresh for 6.4 days

- ▼ 6.0 times, Wave 28
- ▼ 6.0 times, Wave 32

Expectations Met



Q12. How long do you expect Spinach (English and baby) to stay fresh for, once you have purchased it?
 Q13. How often is this length of freshness met when you buy Spinach (English and baby)?
 Sample Wave 28 N=308, Wave 32 N=305, Wave 36 N=300

A close-up photograph of a lush green spinach field. The leaves are vibrant and show some signs of being eaten, with small holes visible. A large, dark grey circle is overlaid in the center of the image, containing the title text.

Spinach Product Launch Trends.

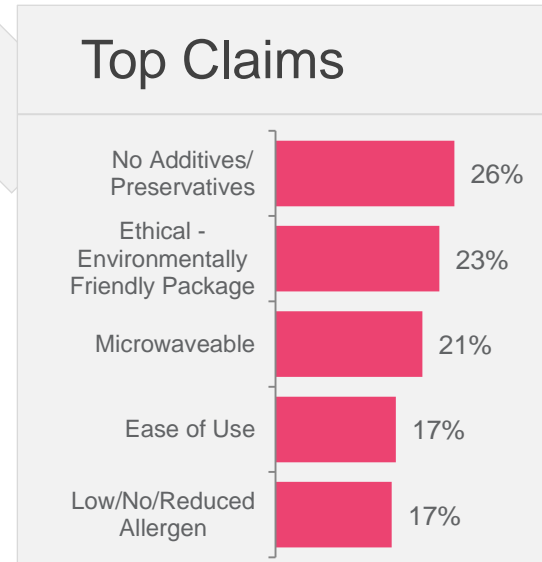
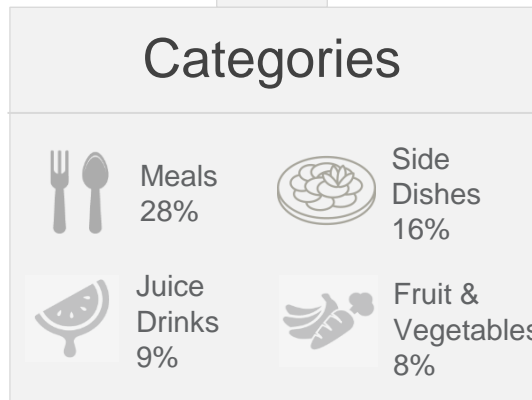
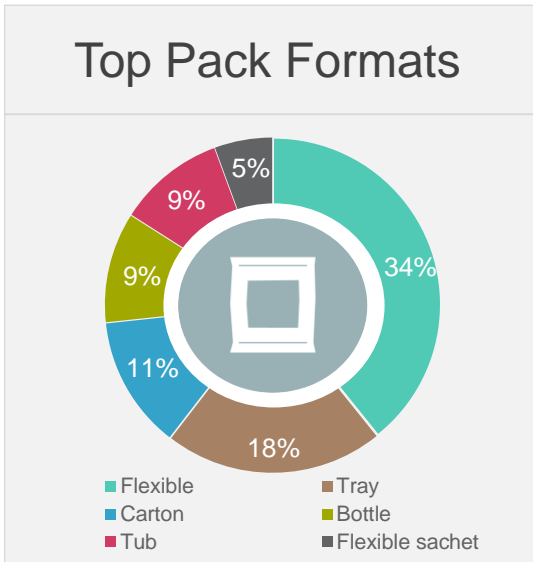
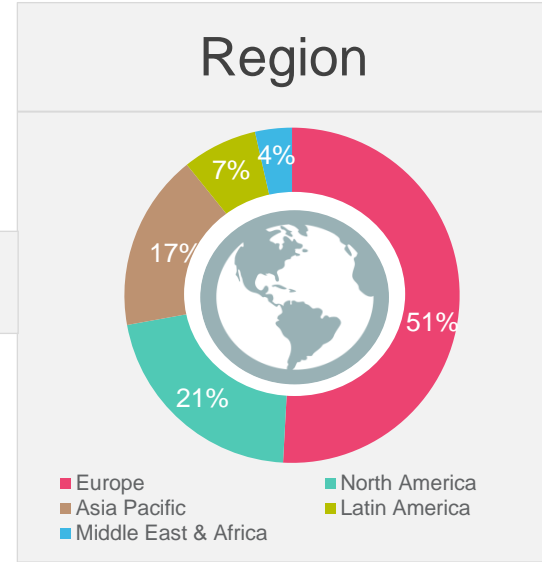
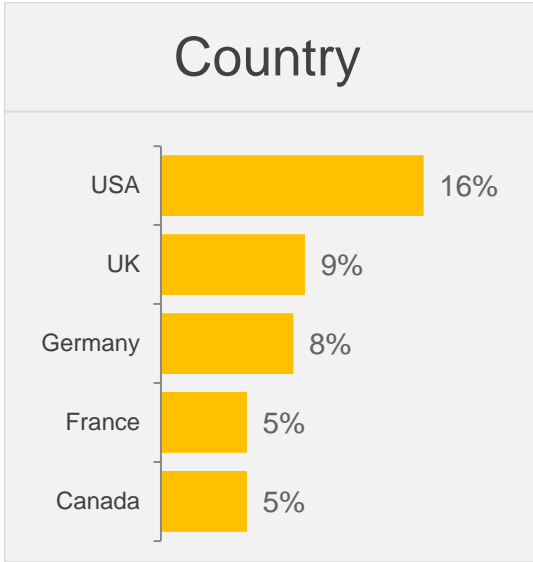
Spinach Global Launches

February – May 2016

There were 704 spinach products launched globally over the last three months. The majority of launches were in USA and the UK. Categories for launches were meals and side dishes. Key packaging for spinach products were flexible packaging and bottles.



704 Global NPDs





Spinach Product Launches: Last 3 Months (February – May 2016) Summary

- There were 704 launches in the past 3 months globally that contained spinach as an ingredient.
- There were 9 products launched in Australia over the past three months.
- Europe (51%) and North America (21%) were the key regions for launches.
- Flexible packaging (34%) and trays (18%) were the most common formats utilised.
- The main categories for launches were meals (28%), side dishes (16%), juice, snacks (9%) and fruits & vegetables (8%).
- Most popular claims on products included no additives/preservatives (26%) and ethical & environmentally friendly packaging (23%).
- The most innovative product launched was Spinach, Apple & Kale Organic Teething Wafers from Canada. Examples of these can be found in the following pages.

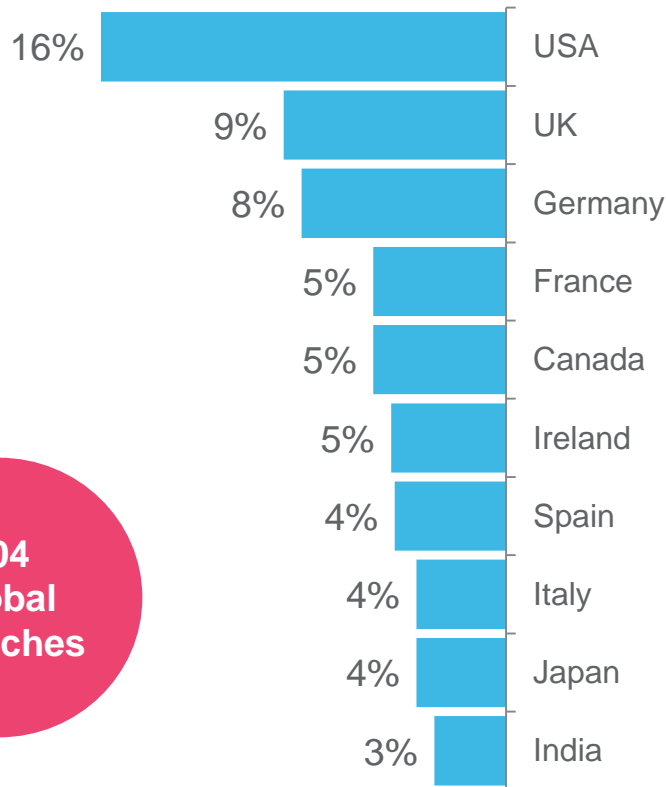


Source: Mintel (2016)

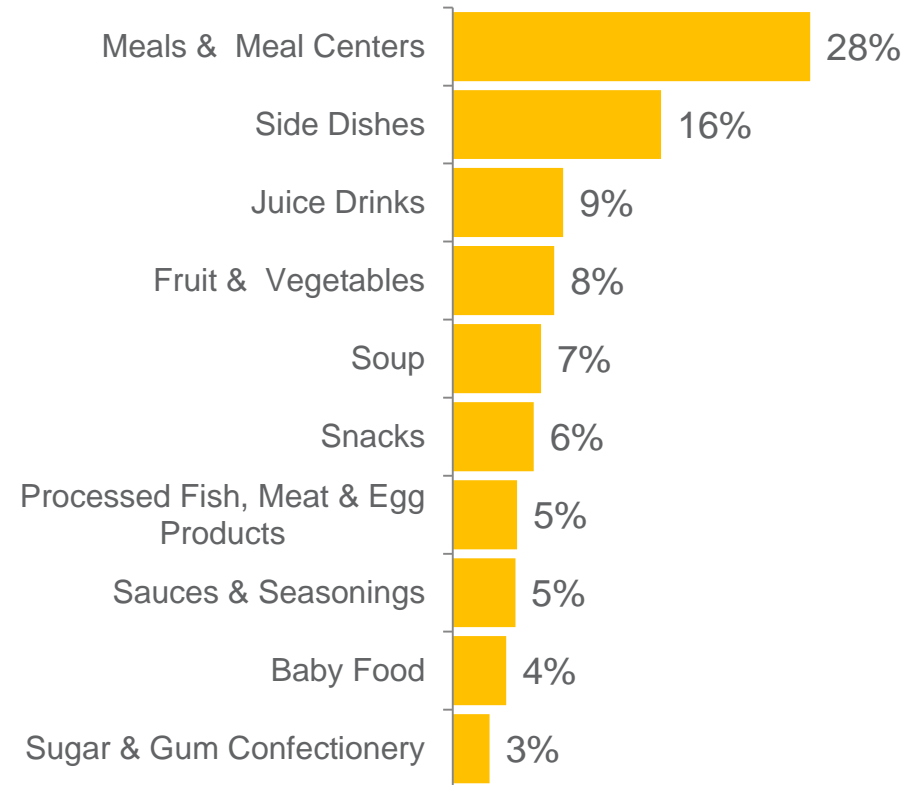


The majority of spinach launches occurred in USA and the UK, consistent with the previous wave. The key categories for spinach launches are meals, side dishes, and juice drinks.

Top Launch Countries



Top Launch Categories












704
Global
Launches












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

Flexible packaging and trays are primarily used for spinach products.

Pack Formats Used

Global		Flexible	34%
		Tray	18%
		Carton	11%
Europe		Flexible	35%
		Tray	25%
		Carton	13%
North America		Flexible	29%
		Bottle	19%
		Tray	11%

Top Claims Used

Global		No Additives/Preservatives	26%
		Ethical - Environmentally Friendly Package	23%
		Microwaveable	21%
Europe		Ethical - Environmentally Friendly Package	23%
		Microwaveable	23%
		No Additives/Preservatives	21%
North America		No Additives/Preservatives	36%
		Organic	35%
		Low/No/Reduced Allergen	33%



Innovative Spinach Launches: L3M (February – May 2016)

Chef Select Ricotta Cheese and Spinach Filled Tortellini Pasta (Spain)

Chef Select Tortelloni Rellena de Ricota y Espinacas (Ricotta Cheese and Spinach Filled Tortellini Pasta) has been relaunched under a new brand name, formerly sold as Deluxe. The product retails in a 250g pack that serves two.



Claims:
N/A

Antonello Mushrooms and Vegetables Filled Triangular Shaped Pasta (Spain)

Antonello Triangulos Rellenos Setas y Verduras (Mushrooms and Vegetables Filled Triangular Shaped Pasta) is now available. The 100% natural ans special vegan product is free from colourings and preservatives, and retails in a 250g pack.



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

Woolworths Food Spinach, Feta, Butternut & Barley Risotto (South Africa)

Woolworths Food Spinach, Feta, Butternut & Barley Risotto consists of a creamy barley risotto made with a rich mushroom stock. The microwave ready product heats in five to six minutes, is suitable for vegetarians and retails in a 700g partially recyclable pack.



Claims:
Microwaveable, Vegetarian, Ethical - Environmentally Friendly Package, Ease of Use

Western Family Chicken, Broccoli & Spinach Lasagna (Canada)

Western Family Chicken, Broccoli & Spinach Lasagna has been repackaged in a newly designed pack. This microwaveable product is made with fresh pasta, layered with chicken, broccoli and spinach in a rich, creamy sauce, topped with mozzarella cheese. It is an excellent source of calcium, a source of fibre, and retails in a 907g pack.



Claims:
Microwaveable

»»» Innovative Spinach Launches: L3M (February – May 2016)

Mövenpick Lemon & Lime Sorbet (Turkey)

Mövenpick Limonlu, Misket Limonu Kabugu Parçacıklı Sorbet (Lemon & Lime Sorbet) contains 24.6% fruit. It retails in a 900ml pack.



Claims:
N/A

Mastika Chicken Burger with Spinach (Spain)

Mastika Burger Meat de Pollastre amb Espinacs (Chicken Burger with Spinach) has been relaunched with a new brand name, previously known as Bo De Debò. The artisan product retails in a 0.180kg pack.



Claims:
N/A

Hidro Cool Natural Hydroponic Salad (Mexico)

Hidro Cool Ensalada Naturale Hidroponico (Natural Hydroponic Salad) have been repackaged in a new designed pack. The ready to eat product retails in 250g pack, containing dressing sachets.



Claims:
Ease of Use

La Pasta di Camerino Straw and Hay Pasta (Germany)

La Pasta di Camerino Straw and Hay Pasta is now available. The original Italian product is made with 33.2% fresh eggs and comprises egg pasta and spinach pasta. It cooks in six to seven minutes and retails in a 500g pack featuring a QR code.



Claims:
N/A



Innovative Spinach Launches: L3M (February – May 2016)

Plum Organics Little Yums Spinach, Apple & Kale Organic Teething Wafers (Canada)

Plum Organics Little Yums Spinach, Apple & Kale Organic Teething Wafers are now available. They are described as the perfect snack to encourage self feeding for teething babies, and have a unique veggie and fruit combination to delight tiny taste buds. They do not contain genetically modified ingredients, artificial flavours or preservatives, dissolve easily and are not messy.



Claims:
No Additives/Preservatives, Organic, Babies & Toddlers (0-4), Ease of Use, GMO-Free

Indianlife Palak Spinach Chips (Canada)

Indianlife Palak Spinach Chips are said to be made according to an authentic family recipe made with non-GMO ingredients such as pure flour, sea salt, spinach, fenugreek and the exclusive Indianlife cayenne spice blend. This vegetarian and vegan product is free of preservatives, trans fats and MSG, and retails in a 170g pack, featuring a QR code.



Claims:
No Additives/Preservatives, Vegetarian, Low/No/Reduced Transfat, Low/No/Reduced Allergen, Vegan, No Animal Ingredients, GMO-Free

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

Chung Jung One Smart Vegetable Rice Sprinklers (Indonesia)

Chung Jung One Smart Sayuran Kering (Vegetable Rice Sprinklers) contain seven kinds of dried vegetables. The product is suitable as seasoning and topping for various dishes and retails in a 24g pack containing three 8g sachets.



Claims:
N/A



Australian Spinach Launches: L3M (February – May 2016)

Freedom Foods Crafted Blends with Superfoods Greens Bar with Pepitas, Spinach & Chickpeas



Wattle Valley Delish Dips Baby Spinach & Feta Dip



Leggo's Tuna Bake Sauce with Spinach & Garlic



Campbell's Gourmet Creamy Pumpkin with Spinach & Ricotta Ravioli Soup



The Juice Lab Gimme Green Premium Pressed Juice



Il Pastaio Ricotta & Spinach Cannelloni





Parsnip.



On average, parsnips are purchased three times per month, and are consumed around five times a month.

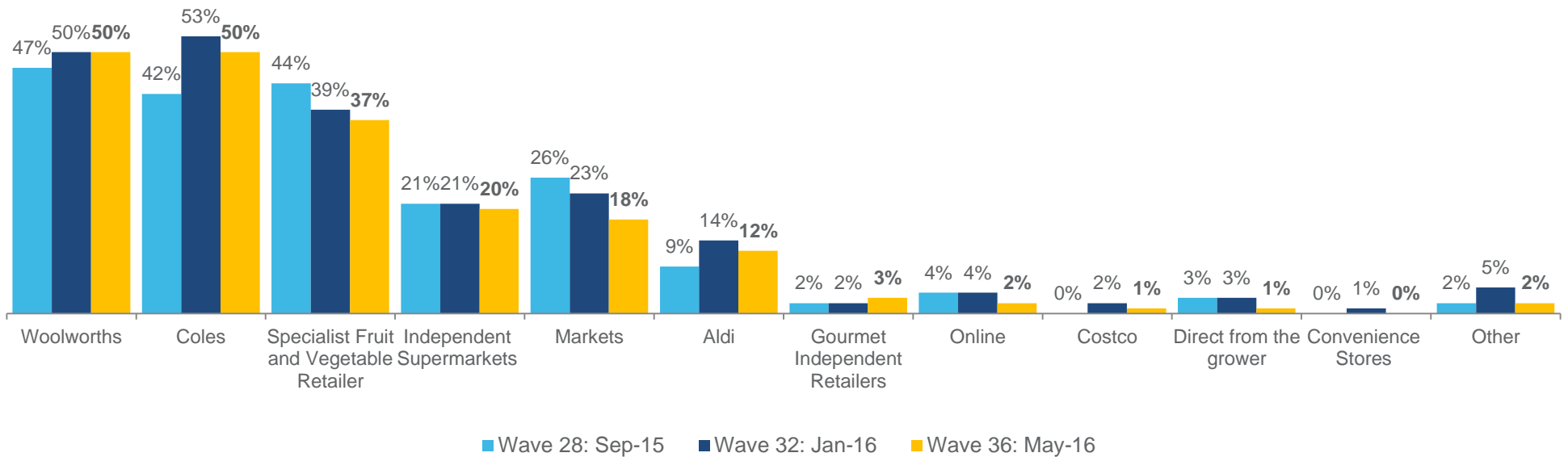
There has been a continuous decline in purchase from specialist vegetable retailers and markets over the last three waves.



▼ 2.4 times, Wave 28
▲ 3.2 times, Wave 32

▼ 4.5 times, Wave 28
▲ 5.2 times, Wave 32

Purchase Channels



Q1. On average, how often do you purchase Parsnips?
 Q2. On average, how often do you consume Parsnips?
 Q5. From which of the following channels do you typically purchase Parsnips?
 Sample Wave 28 N=206, Wave 32 N=206, Wave 36 N=202



Average Spend and Price Sensitivity.



Average weight of purchase

The average consumer typically purchases **800g** of parsnip, slightly lower than the previous wave.

- ▼ 700g, Wave 28
- ▲ 900g, Wave 32



Recalled last spend

Recalled last spend on parsnips was **\$3.90**, which is \$0.60 lower than the last wave.

- ▼ \$3.70, Wave 28
- ▲ \$4.50, Wave 32



Value for money

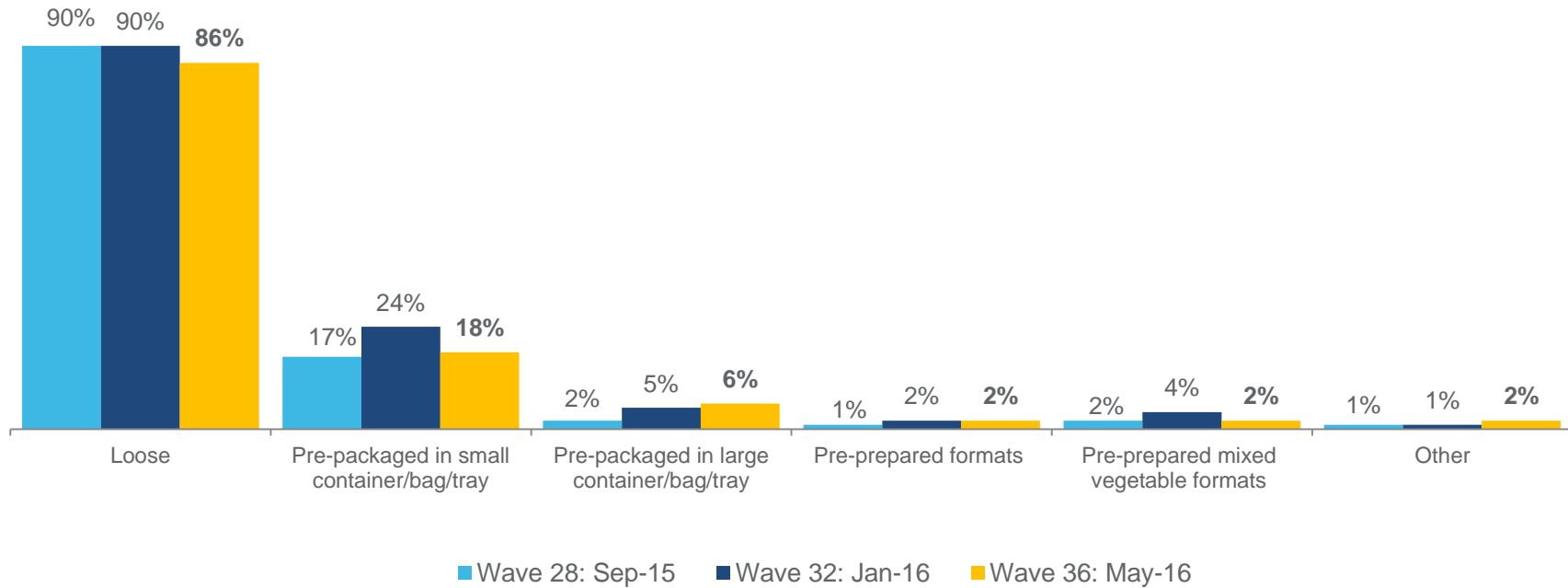
Consumers' perceived value for money is fair for parsnips (**5.5/10**), relatively consistent with past months.

- ▲ 5.6/10, Wave 28
- ▲ 5.6/10, Wave 32

Q3. How much Parsnip do you typically purchase when you shop for it?
 Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
 Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
 Sample Wave 28 N=206, Wave 32 N=206, Wave 36 N=202



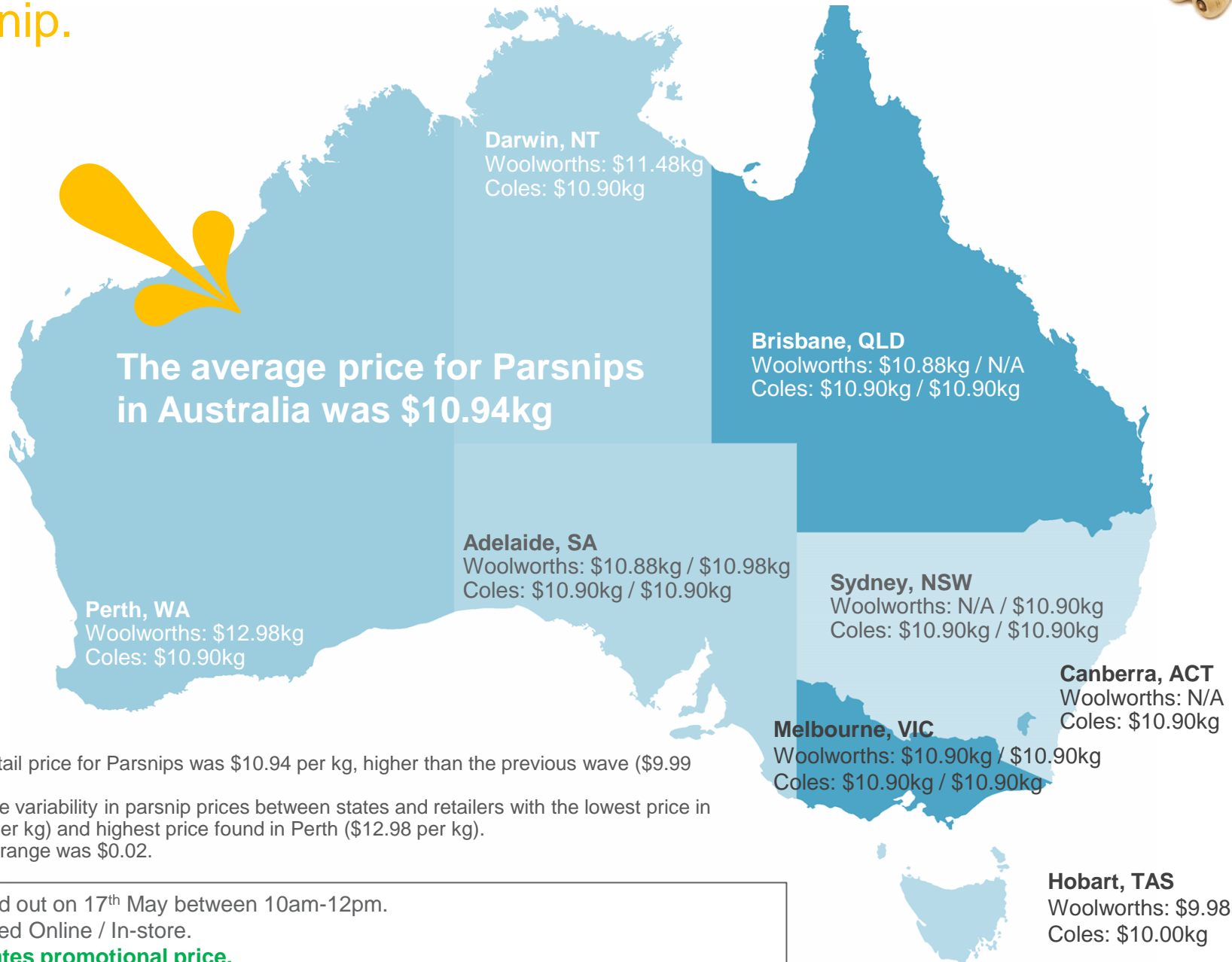
Individual parsnips remain the most common purchase format, consistent with past waves.



Q4b. In what fresh formats do you typically purchase Parsnips?
Sample Wave 28 N=206, Wave 32 N=206, Wave 36 N=202

Online and In-store Commodity Prices

Parsnip.



- The average retail price for Parsnips was \$10.94 per kg, higher than the previous wave (\$9.99 per kg).
- There was some variability in parsnip prices between states and retailers with the lowest price in Hobart (\$9.98 per kg) and highest price found in Perth (\$12.98 per kg).
- The retail price range was \$0.02.

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



Awareness of parsnip varieties is low, with 79% of consumers unable to recall a type. Those who recalled a type were generally prompted by colour.

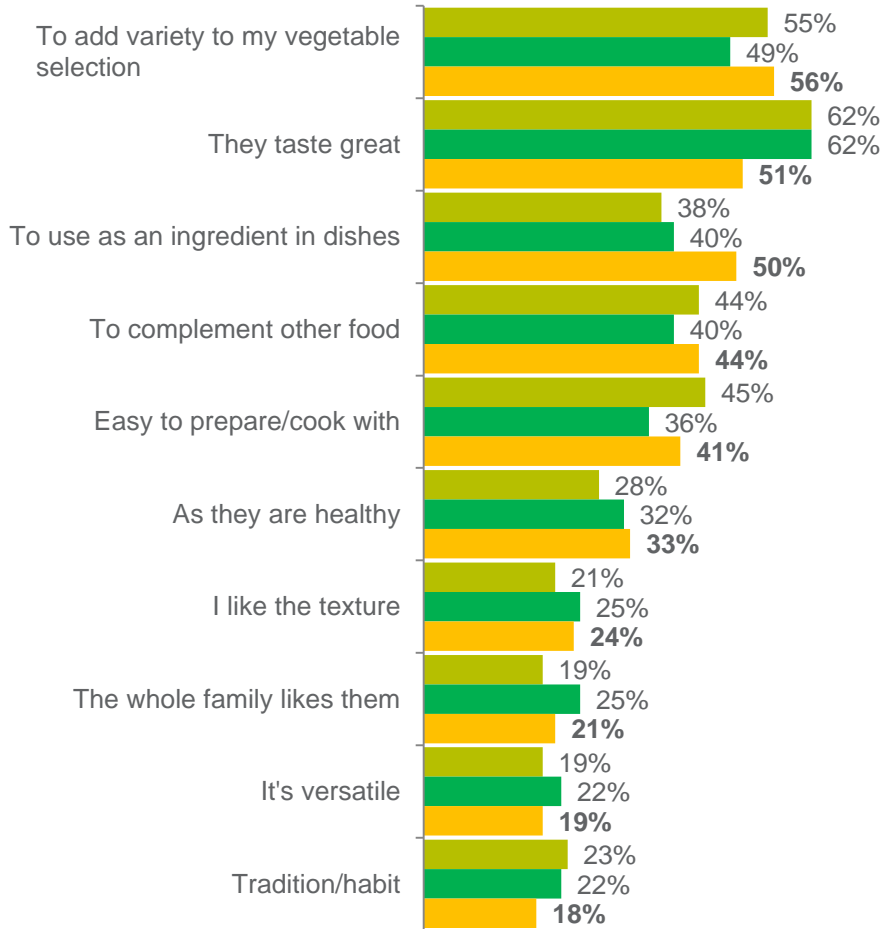




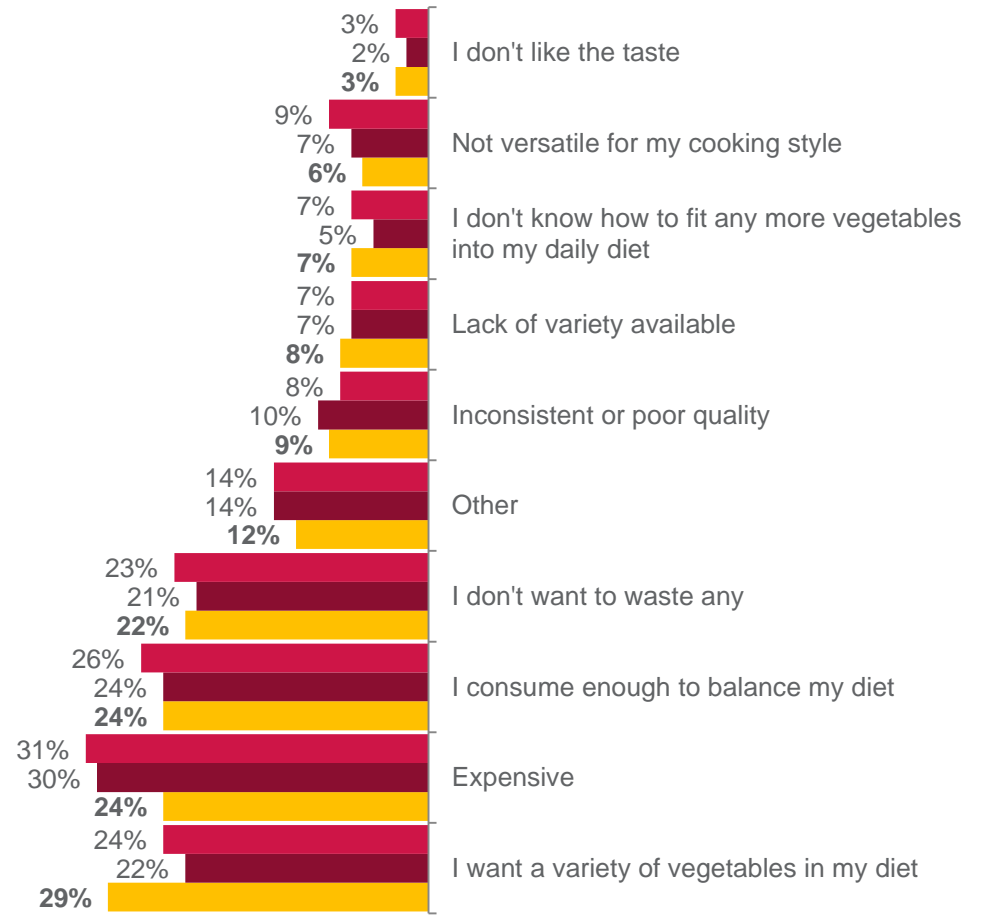
Adding variety and taste are the key triggers to purchase. In contrast, expense, wanting variety and already consuming enough are the key barriers. This wave sees an increase in use as an ingredient in dishes as a reason to purchase parsnips.



Triggers



Barriers



■ Wave 28: Sep-15 ■ Wave 32: Jan-16 ■ Wave 36: May-16

■ Wave 28: Sep-15 ■ Wave 32: Jan-16 ■ Wave 36: May-16

Q7. Which of the following reasons best describes why you purchase Parsnips?
 Q8. Which reason best describes why you don't buy Parsnips more often?
 Sample Wave 28 N=206, Wave 32 N=206, Wave 36 N=202



Cooking styles remain centred in Australian and British cooking, with little variability in other cuisines.

Meal occasions tend to occur during dinner and family meals.

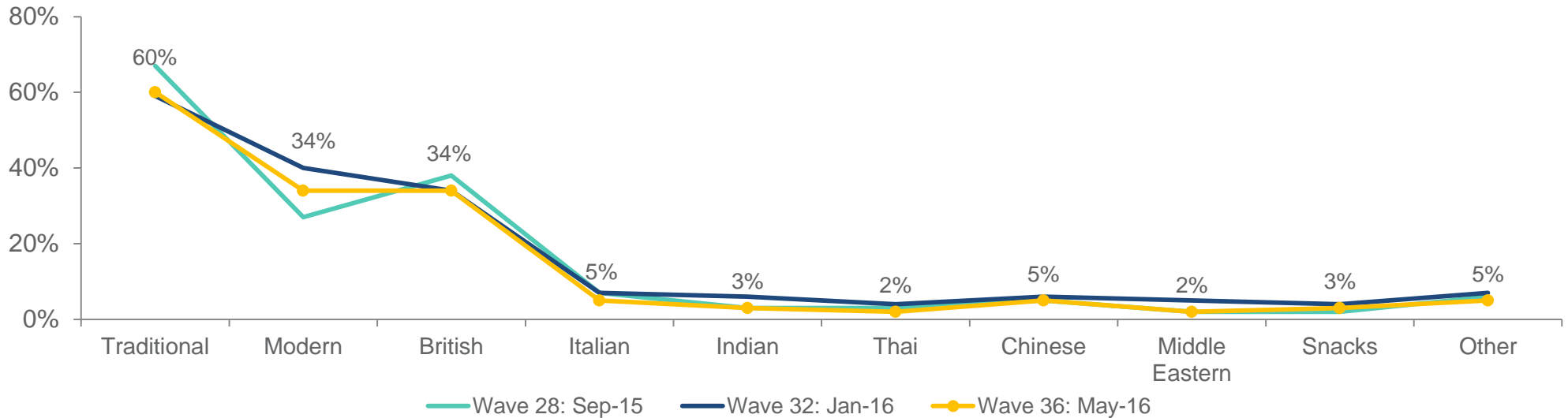
Top 5 Consumption Occasions

	Wave 32	Wave 36
Dinner	71%	70%
Family Meals	56%	56%
Weekday Meals	33%	34%
Weekend Meals	36%	33%
Quick Meals	12%	12%

12%
used parsnip when cooking a new recipe

▲ 13%, Wave 32

Typical Cuisine Cooked

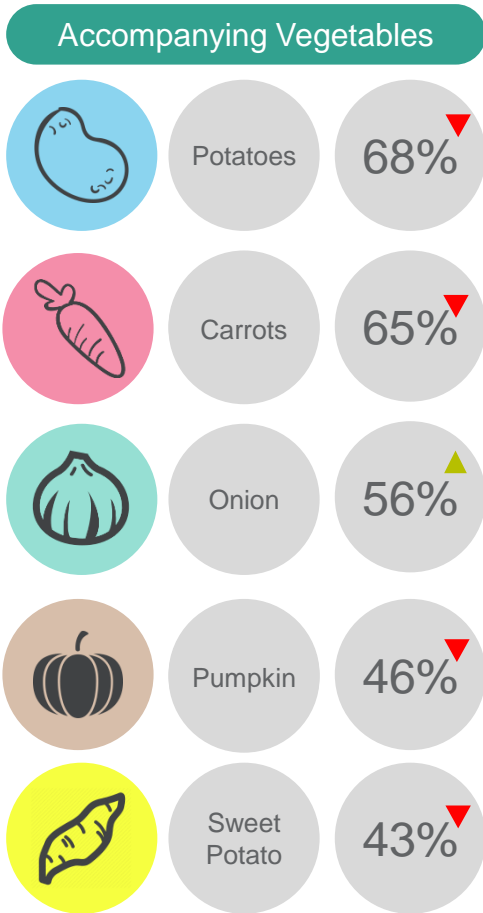


← Australian → ← European → ← Asian → ← Other Cuisines →

Q10. What cuisines do you cook/consume that use Parsnips?
 Q11. Which of the following occasions do you typically consume/use Parsnips?
 Sample Wave 28 N=206, Wave 32 N=206, Wave 36 N=202



Consumers prefer to serve parsnips with potatoes and carrots. Parsnips are generally roasted or cooked in soups. There has been an increase in slow cooking parsnips as a cooking style over the last three waves.



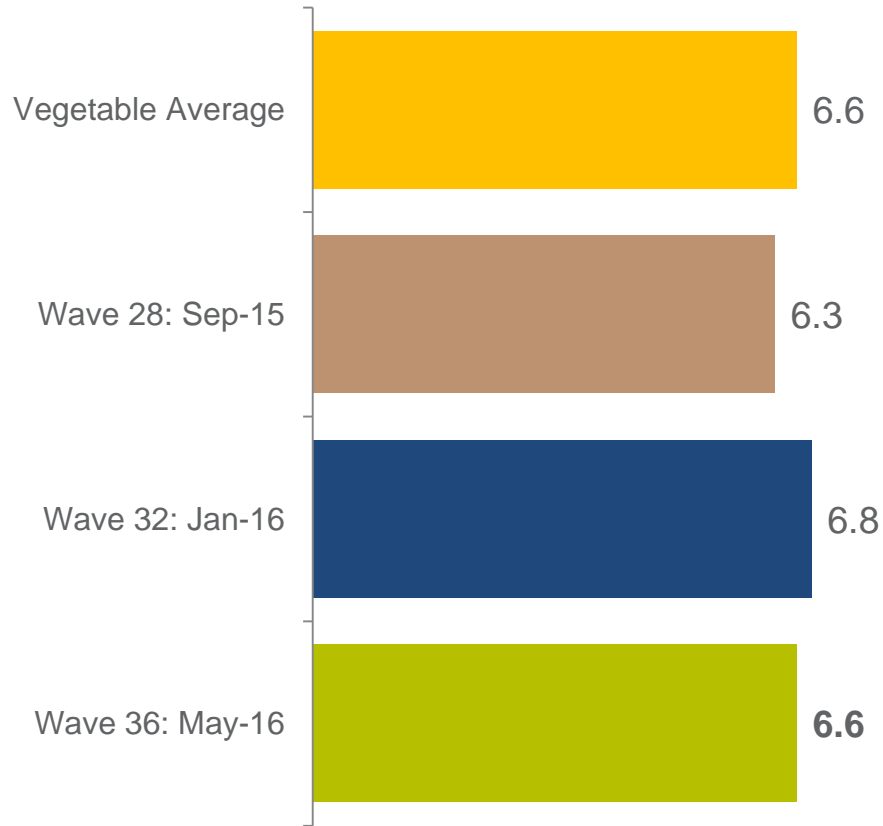
Top 10 Cooking Styles

	Wave 28	Wave 32	Wave 36
Roasting	74%	70%	64%
Soup	42%	40%	48%
Slow Cooking	17%	23%	26%
Baking	33%	36%	25%
Mashing	28%	24%	24%
Boiling	20%	21%	14%
Steaming	15%	19%	12%
Stir frying	12%	11%	8%
Microwave	5%	5%	6%
Frying	7%	7%	3%

Q9. How do you typically cook Parsnips?
 Q10a. And when are you serving Parsnips which of the following do you also serve together with this?
 Sample Wave 28 N=206, Wave 32 N=206, Wave 36 N=202



Knowing the provenance of parsnips in general has slightly declined this wave, now sitting in line with the Vegetable Average. Knowing that parsnips are grown in Australia remains the most important provenance information for consumers.



Q14. When purchasing Parsnips, how important is Provenance to you?
Q15. And when purchasing Parsnips, how important is that it is grown in Australia?
Sample Wave 28 N=206, Wave 32 N=206, Wave 36 N=202

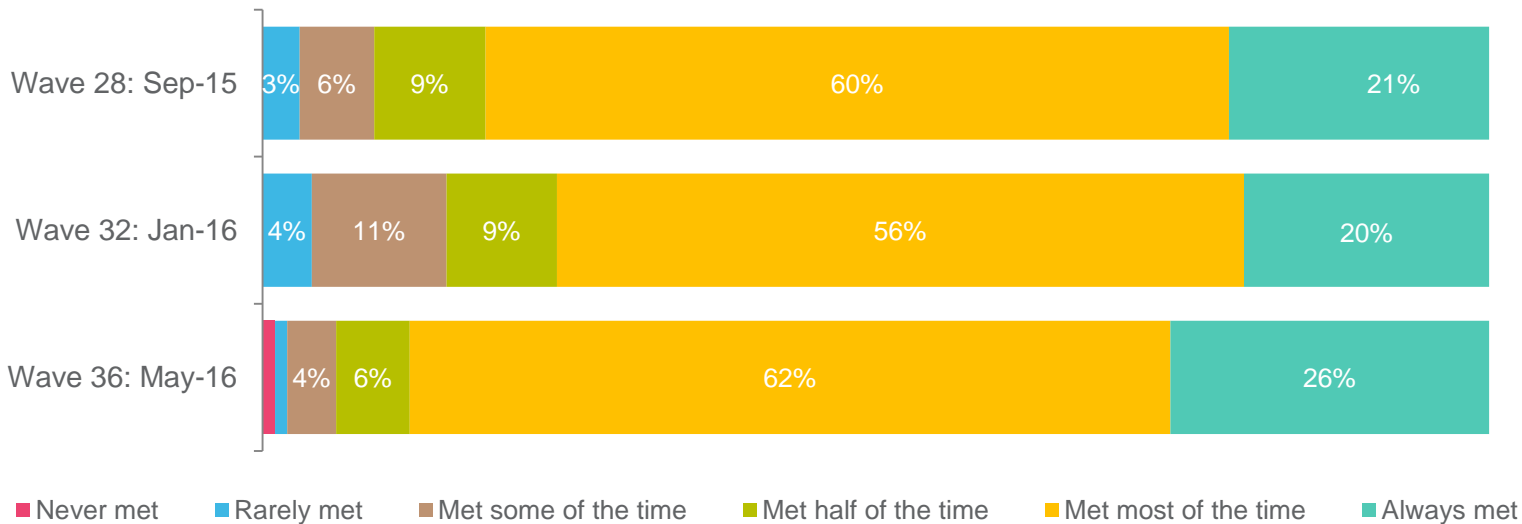


Consumers expect parsnips to remain fresh for over a week once purchased. These expectations are increasingly being met in comparison to previous waves.

Expected to stay fresh for 8.7 days

- ▲ 9.5 days, Wave 28
- ▲ 9.9 days, Wave 32

Expectations Met



Q12. How long do you expect Parsnips to stay fresh for, once you have purchased it?
 Q13. How often is this length of freshness met when you buy Parsnips?
 Sample Wave 28 N=206, Wave 32 N=206, Wave 36 N=202

A photograph of several large, light-colored parsnips with characteristic ribbed skin, resting on a dark wooden surface. A large, dark grey circular graphic is overlaid in the center of the image, containing the title text.

Parsnip Product Launch Trends.

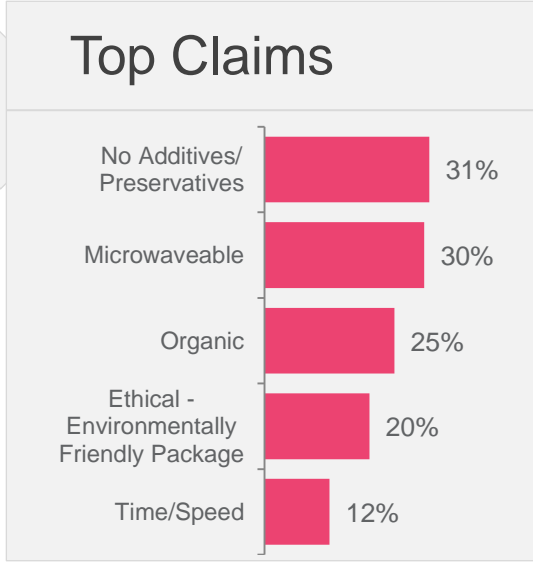
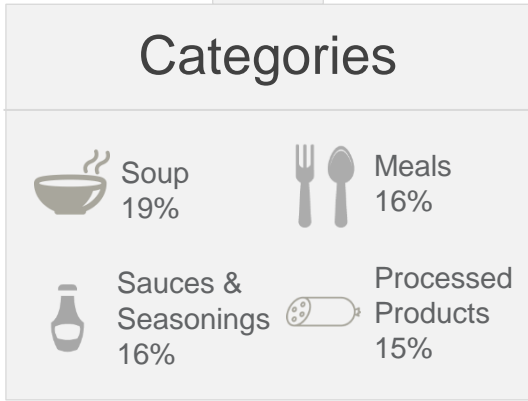
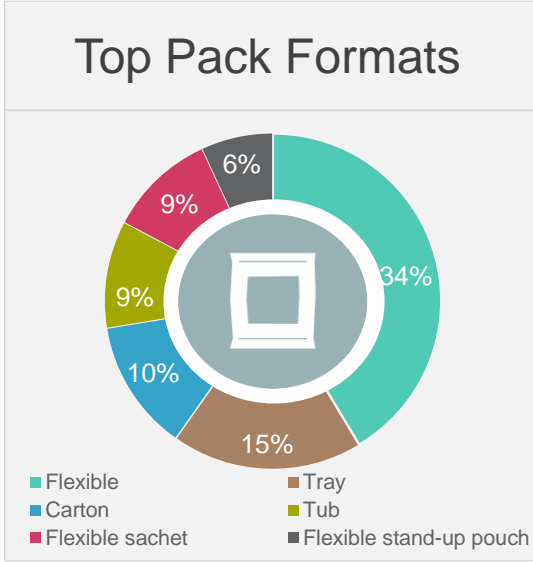
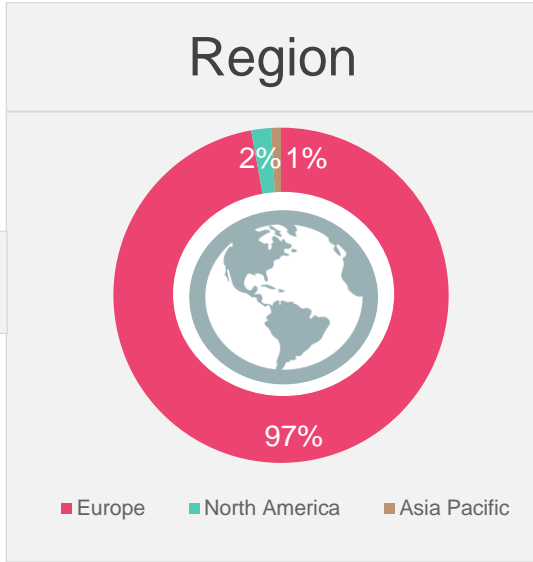
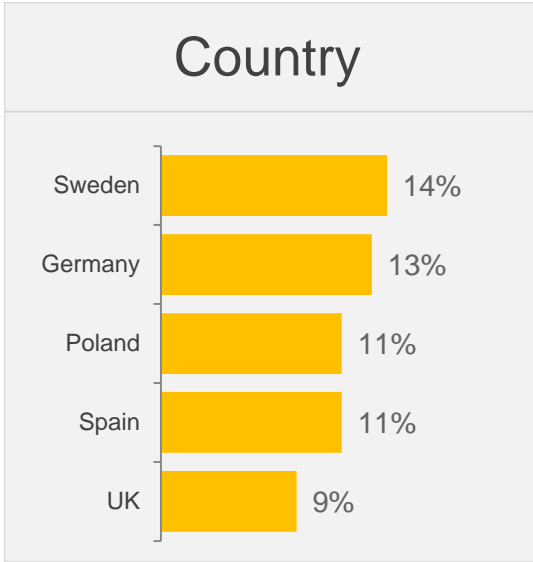
Parsnip Global Launches

February – May 2016

There were 105 parsnip products launched globally over the last three months. The majority of launches were in Sweden, Germany and Poland. Categories for launches were soups and meals. Key packaging for parsnip products were flexible formats.



105 Global NPDs





Parsnip Product Launches: Last 3 Months (February – May 2016) Summary

- There were 105 launches in the past 3 months globally that contained parsnip as an ingredient.
- There were no products launched in Australia over the past three months.
- Europe (97%) was the key region for launches.
- Flexible packaging (34%) and trays (15%) were the most common formats used for products.
- The main categories for launches were soups (19%), meals (16%), and sauces & seasonings (16%).
- Claims used on products included no additives/preservatives (31%), microwaveable (30%), and organic (25%).
- The most innovative product launched was a Wok Mix from Denmark. Examples of these can be found in the following pages.



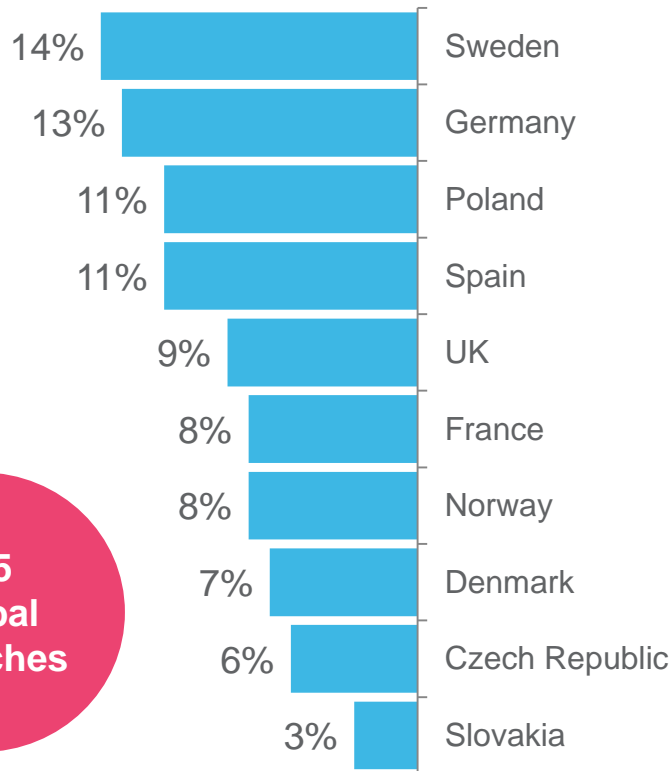
Source: Mintel (2016)



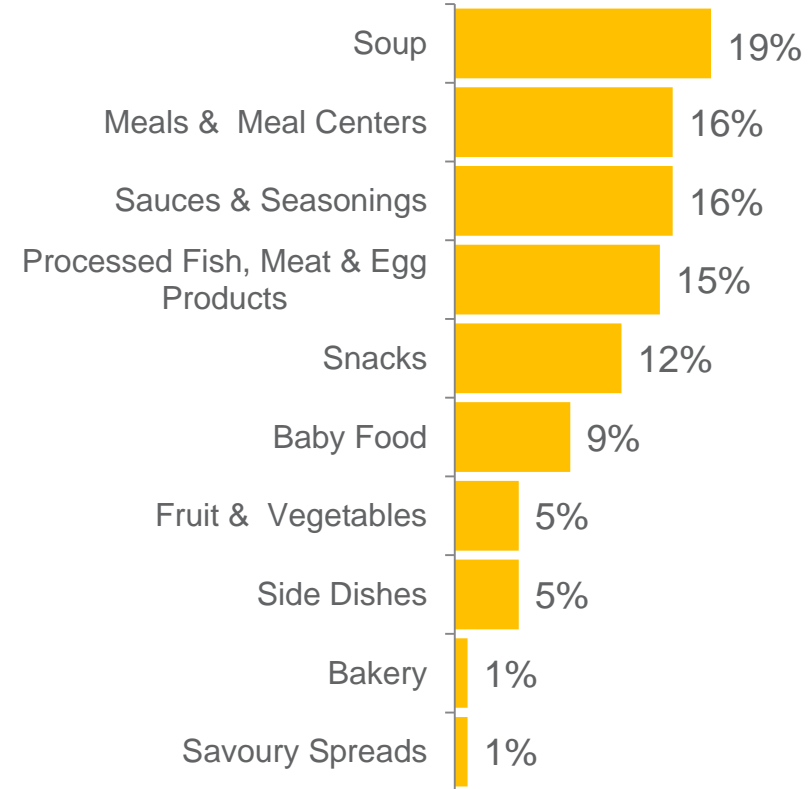
The majority of launches occurred in Sweden, Germany and Poland.

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

Top Launch Countries



Top Launch Categories




105
Global
Launches









The main claims globally were no additives/preservatives, microwaveable and organic. Flexible packaging, trays and cartons are the main formats for parsnip products.

Pack Formats Used

Global		Flexible	34%
		Tray	15%
		Carton	10%
Europe		Flexible	32%
		Tray	16%
		Carton	11%

Top Claims Used

Global		No Additives/Preservatives	31%
		Microwaveable	30%
		Organic	25%
Europe		Microwaveable	31%
		No Additives/Preservatives	30%
		Organic	23%

➤➤➤ Innovative Parsnip Launches: L3M (February – May 2016)

Mou Den Gode Suppe Curry Soup (Norway)

Mou Den Gode Suppe Curry Soup is a mild and creamy soup that comprises chicken, vegetables and rice. It has been cooked for eight hours with chicken and soup herbs. This product retails in a 1000g pack providing three to four portions and bearing a serving suggestion.



Claims:
N/A

Findus Mix of Root Vegetables (Norway)

Findus Våre Utvalgte Rotgrønnsaker (Mix of Root Vegetables) feature a rustic cut. They have been carefully selected from local Norwegian farms and are quickly frozen in order to preserve the taste and quality. This product retails in a recyclable 450g pack featuring the Nyt Norge logo and a recipe suggestion.



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

Blédina Carrot & Cauliflower Puree (France)

Blédina Purée Panais Dinde (Parsnip & Turkey Puree) is made with 100% natural origin ingredients, and is free from preservatives. This microwaveable product is described to have a smooth texture, is suitable for babies from six months of age, and retails in a recyclable 400g pack containing two 200g jars and featuring a QR code.



Claims:
No Additives/Preservatives, All Natural Product, Microwaveable, Babies & Toddlers (0-4), Ethical - Environmentally Friendly Package

Irmas Organic Root Vegetable Chips (Denmark)

Irmas Økologiske Rodfrugt Chips (Organic Root Vegetable Chips) comprise chips made from carrot, beetroot and parsnip fried in sunflower oil until crispy and seasoned with sea salt. The product retails in a 100g pack bearing the EU Green Leaf logo.



Claims:
Organic

➤➤➤ Innovative Parsnip Launches: L3M (February – May 2016)

Rewe Beste Wahl Gnocchi with Sage (Germany)

Rewe Beste Wahl Gnocchi Salbei (Gnocchi with Sage) are now available with a new recipe without flavour enhancers, artificial flavours and colourings. This microwavable product, which can be also prepared in an oven, retails in a 370g pack.



Claims:
No Additives/Preservatives, Microwaveable, Premium

Paulúns Supermix Bhutanese Red Rice with Green Lentils, Quinoa, Brown Rice and Pumpkin Seeds (Sweden)

Paulúns Supermix Rött Råris med Gröna Linser, Quinoa, Brunt Råris & Pumpafrön (Bhutanese Red Rice with Green Lentils, Quinoa, Brown Rice and Pumpkin Seeds) is said to be rich in fibre and contains extra protein from the green lentils, quinoa and crunchy pumpkin seeds. The all-natural product has a cooking time of 20 minutes, and it retails in a 360g pack containing eight portions.



Claims:
All Natural Product, High/Added Fiber

ICA Rätt Enkelt Hot BBQ Chicken Wings (Sweden)

ICA Rätt Enkelt Förokta Kycklingvingar (Hot BBQ Chicken Wings) are said to be slow cooked in an air tight pack on low heat, which makes the meat extra juicy and tender. The product is made with Swedish poultry, simply needs heating, and retails in a 425g pack containing six units bearing the Svensk Fågel logo.



Claims:
Ease of Use

VG Végétal Gourmand Lupin Thin Slices (France)

VG Végétal Gourmand Emincés de Lupin (Lupin Thin Slices) are made from whole lupin grain that has a similar or even higher protein content when compared to soya. They are rich in magnesium and proteins, a source of fibres, calcium and iron, and low in saturated fatty acids. The organic certified product is suitable for vegans and is said to be ideal when pan-fried with pasta or vegetables.



Claims:
Organic, Ethical - Environmentally Friendly Package, Vegan, No Animal Ingredients, Low/No/Reduced Saturated Fat, Social Media

»»» Innovative Parsnip Launches: L3M (February – May 2016)

Tesco Roasted Root Vegetable Chips (UK)

Tesco Roasted Root Vegetable Chips provide one of the five a day recommended daily portions of fruit and vegetables. The product is suitable for vegetarians and retails in a 500g pack featuring the Tesco Nurture logo for responsible farming.



Claims:
Vegetarian, Ethical - Environmentally Friendly Product, Ethical - Human

Pip & Pear Delicious Lentils for Babies (Spain)

Pip & Pear Deliciosas Lentejas (Delicious Lentils for Babies) are now available. This stage-2 product is suitable for babies of seven months onwards, comprises lentils with sweet potato, tomato and vegetables, is said to be perfect to develop interest in flavours and textures, and has the perfect size for growing babies. This microwavable product is free from gluten, dairy, salt, sugar, and added additives, is made with 100% natural ingredients, and retails in a 120g recyclable pack.



Claims:
No Additives/Preservatives, All Natural Product, Low/No/Reduced Sugar, Microwaveable, Low/No/Reduced Sodium, Babies & Toddlers (0-4), Gluten-Free, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Package

Saariainen Balanssi Rainbow Trout Meal (Finland)

Saariainen Balanssi Kirjolohifileeteria (Rainbow Trout Meal) is new to the range. The meal consists of rainbow trout, green kale pesto and baked root vegetables. It contains 25g of protein, 140g of vegetables per portion which is 50% of the recommended daily allowance and is free from added preservatives or additives, gluten, egg and lactose.



Claims:
No Additives/Preservatives, High/Added Fiber, Microwaveable, Low/No/Reduced Sodium, Gluten-Free, Low/No/Reduced Allergen, Low/No/Reduced Lactose

Coop 365 Økologi Wok Mix (Denmark)

Coop 365 Økologi Wok Mix contains green beans, red peppers, parsnip, carrots and grilled onions. The microwavable product retails in a 450g pack bearing the Green Keyhole and EU Leaf logos.



Claims:
Microwaveable, Organic



Beetroot.





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

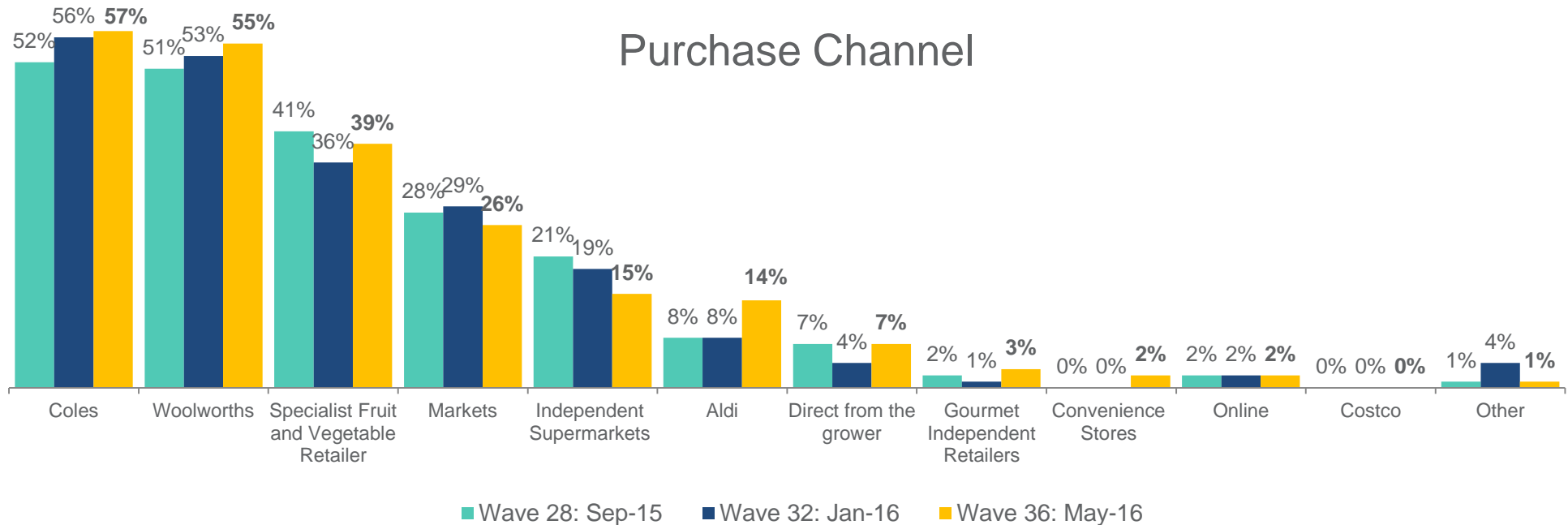
There has been a continuous increase in purchase from mainstream supermarkets, whilst there has been a decline in purchase from independent supermarkets.



- ▲ 3.2 times, Wave 28
- ▲ 3.0 times, Wave 32

- 8.3 times, Wave 28
- ▼ 8.1 times, Wave 32

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 28 N=206, Wave 32 N=207, Wave 36: N=202



Average Spend and Price Sensitivity.



Average weight of purchase

The average consumer typically purchases **0.9kg** of beetroots, which is consistent with the last wave.

- ▲ 1.0kg, Wave 28
- 0.9kg, Wave 32



Recalled last spend

The average recalled last spend is **\$3.70** in May 2016, slightly lower than the previous waves.

- ▲ \$3.90, Wave 28
- ▲ \$3.90, Wave 32



Value for money

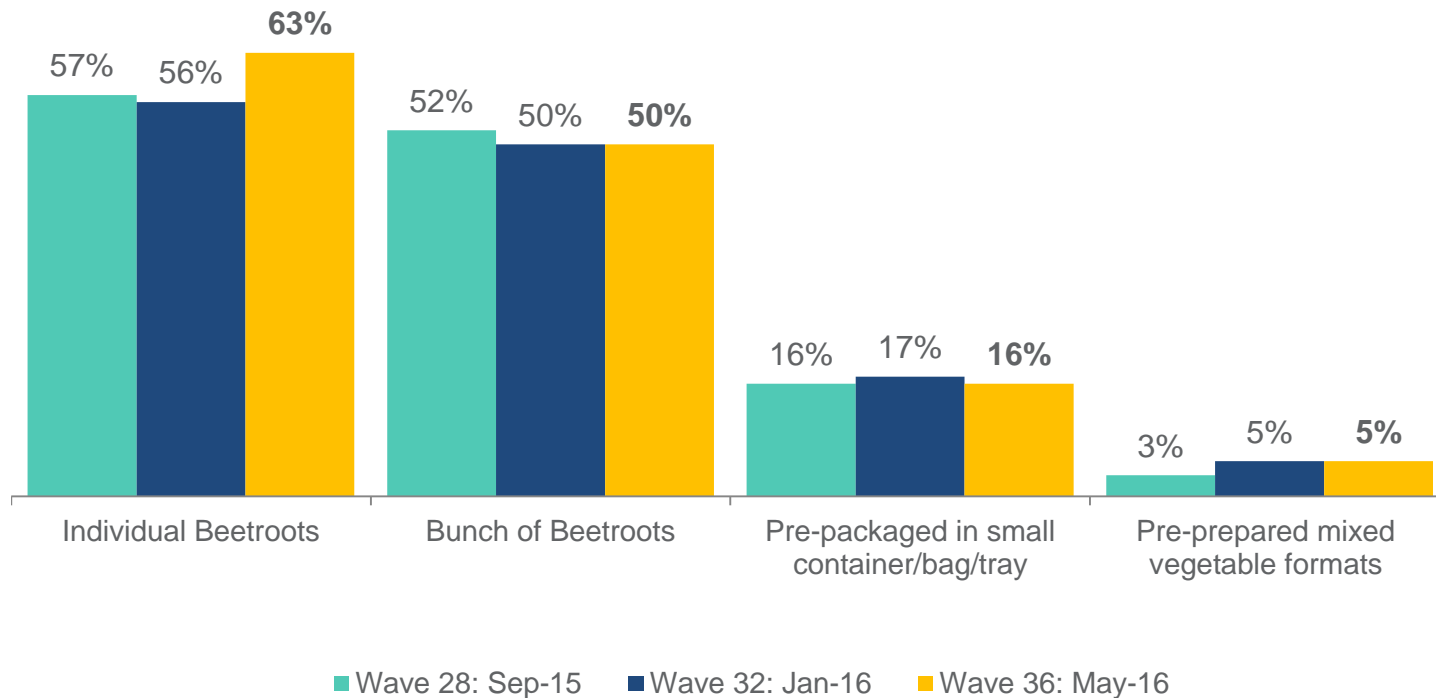
On average, consumers perceive beetroot to be good value for money **(6.5/10)**.

- 6.5/10, Wave 28
- ▼ 6.4/10, Wave 32

Q3. How much <commodity> do you typically purchase when you shop for it?
 Q3b. To the best of your memory how much did this cost on your most recent typical purchase?
 Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
 Sample Wave 28 N=206, Wave 32 N=207, Wave 36: N=202



Both individual and bunched beetroot formats appeal most to consumers, consistent with the past waves.

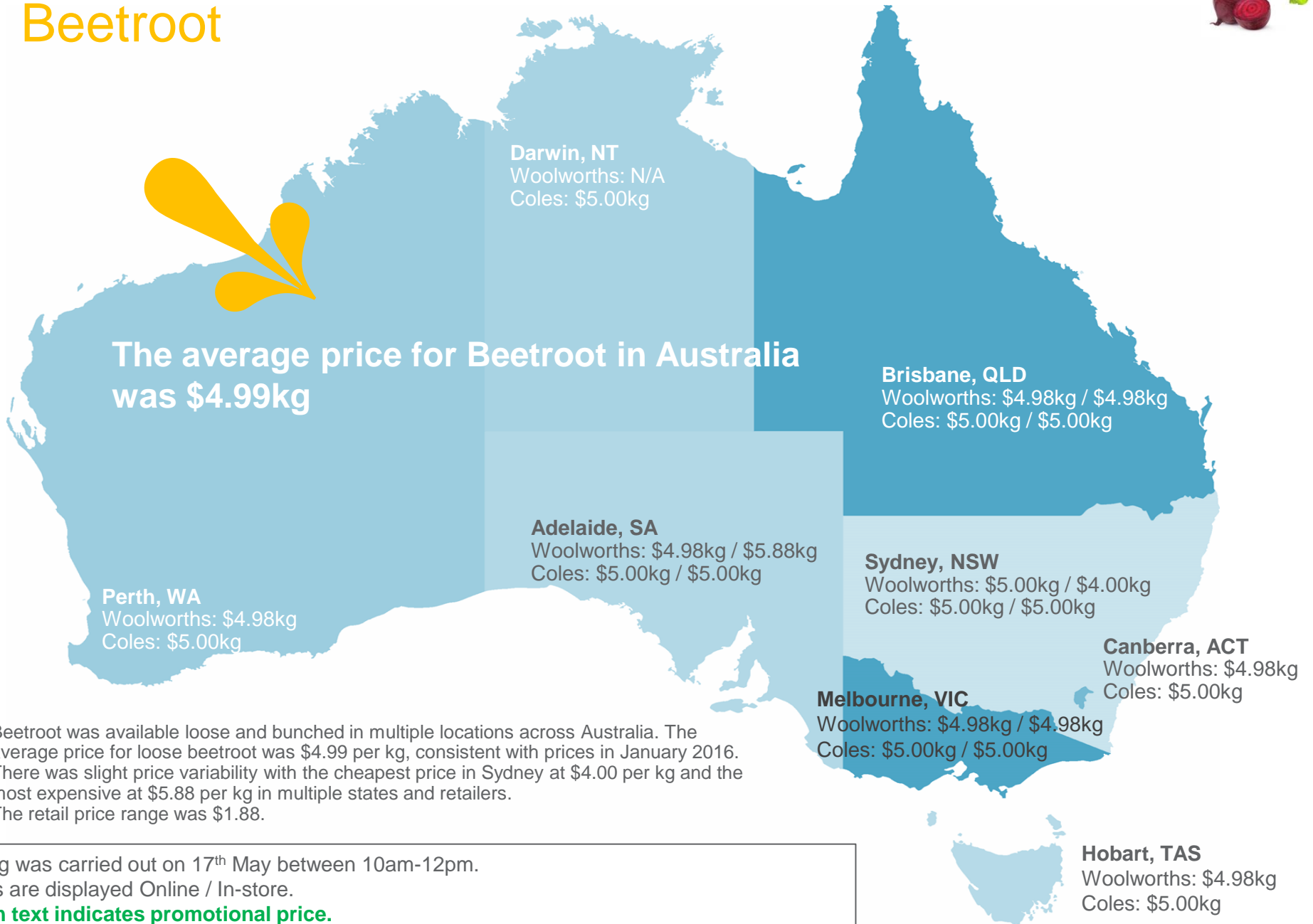


Q4b. In what fresh formats do you typically purchase Beetroot?
Sample Wave 28 N=206, Wave 32 N=207, Wave 36: N=202



Online and In-store Commodity Prices

Beetroot



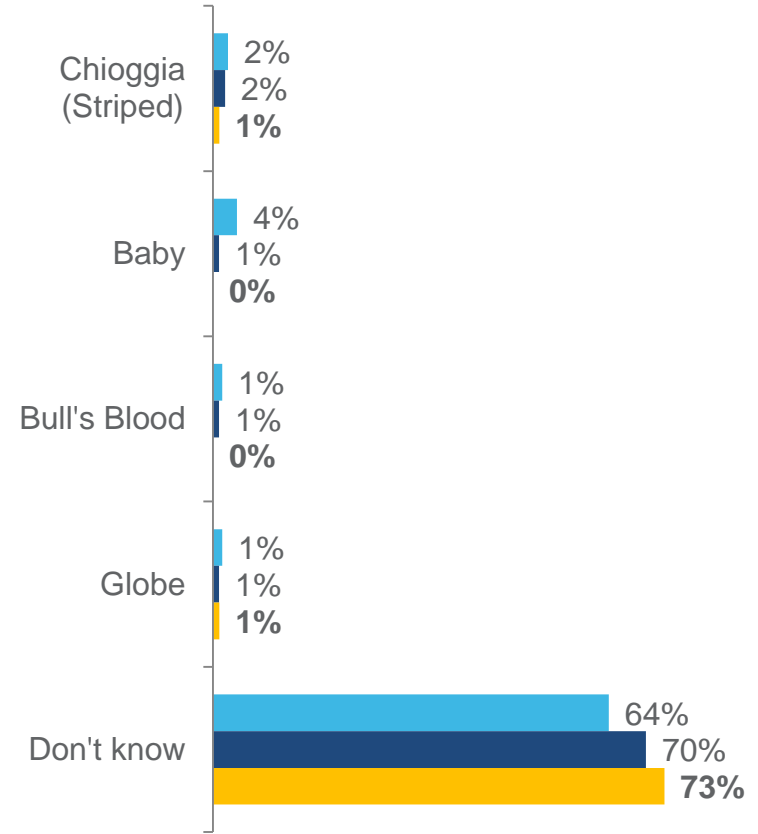
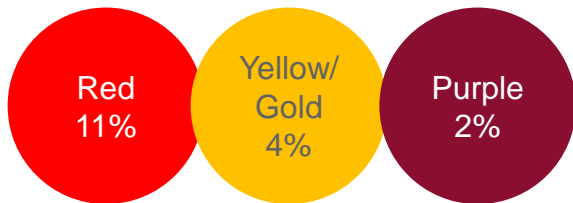
- Beetroot was available loose and bunched in multiple locations across Australia. The average price for loose beetroot was \$4.99 per kg, consistent with prices in January 2016.
- There was slight price variability with the cheapest price in Sydney at \$4.00 per kg and the most expensive at \$5.88 per kg in multiple states and retailers.
- The retail price range was \$1.88.

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



Awareness of beetroot varieties is consistently low across waves, with nearly three quarters of consumers unable to recall a type.

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



■ Wave 28: Sep-15 ■ Wave 32: Jan-16 ■ Wave 36: May-16

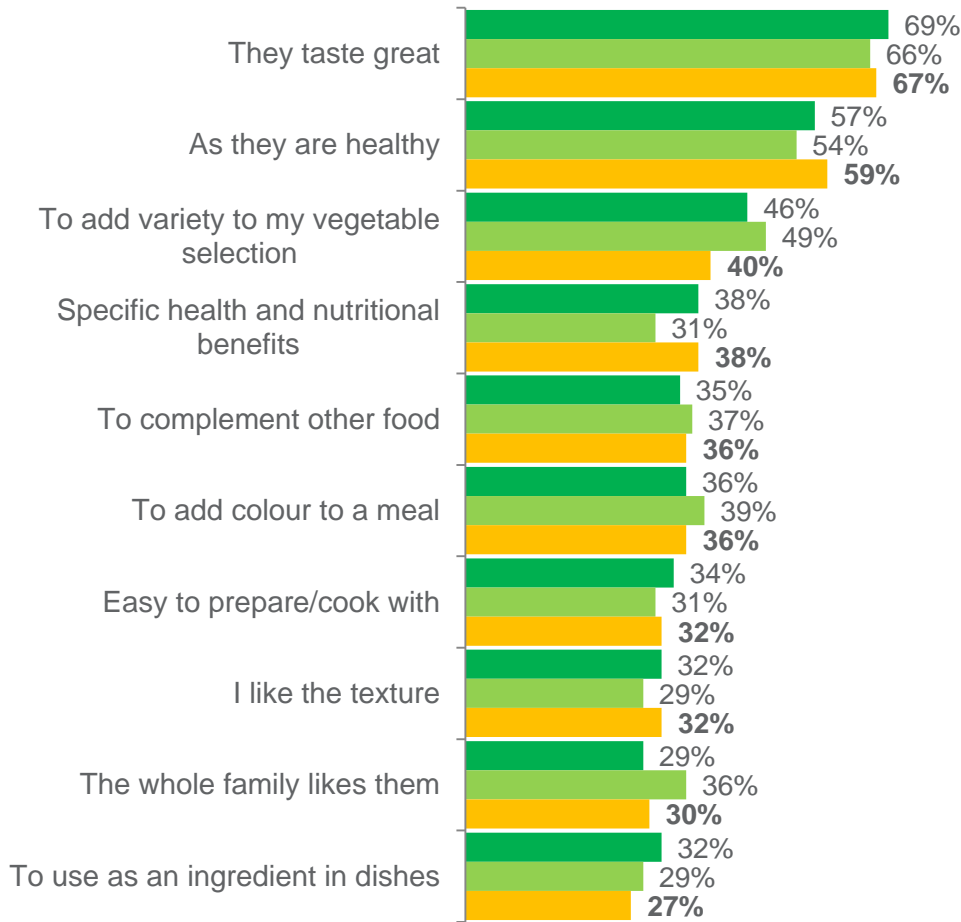
Q6a. What varieties/types of <commodity> are you aware of? (unprompted)
Sample Wave 28 N=206, Wave 32 N=207, Wave 36: N=202



The main triggers for beetroot purchase are taste and health. Consumers list having enough to balance their diet and not wanting to waste any as the key barriers to purchase.

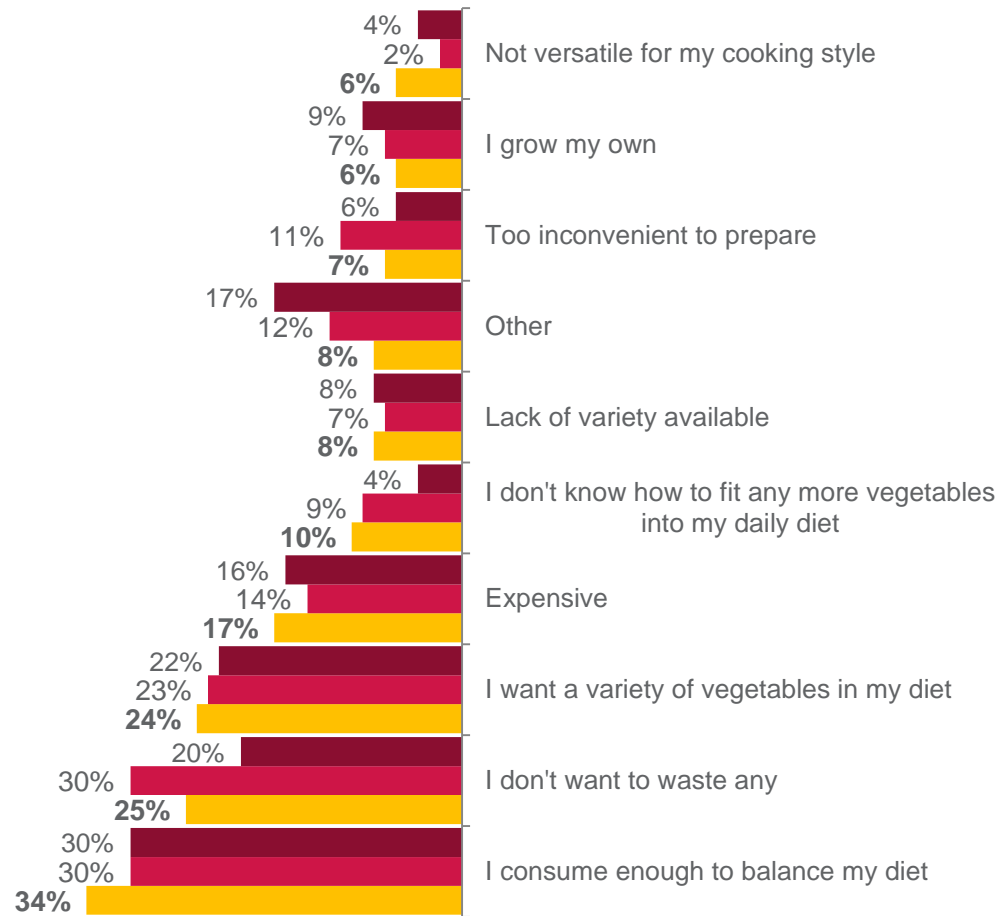


Triggers



■ Wave 28: Sep-15 ■ Wave 32: Jan-16 ■ Wave 36: May-16

Barriers



■ Wave 28: Sep-15 ■ Wave 32: Jan-16 ■ Wave 36: May-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 28 N=206, Wave 32 N=207, Wave 36: N=202



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

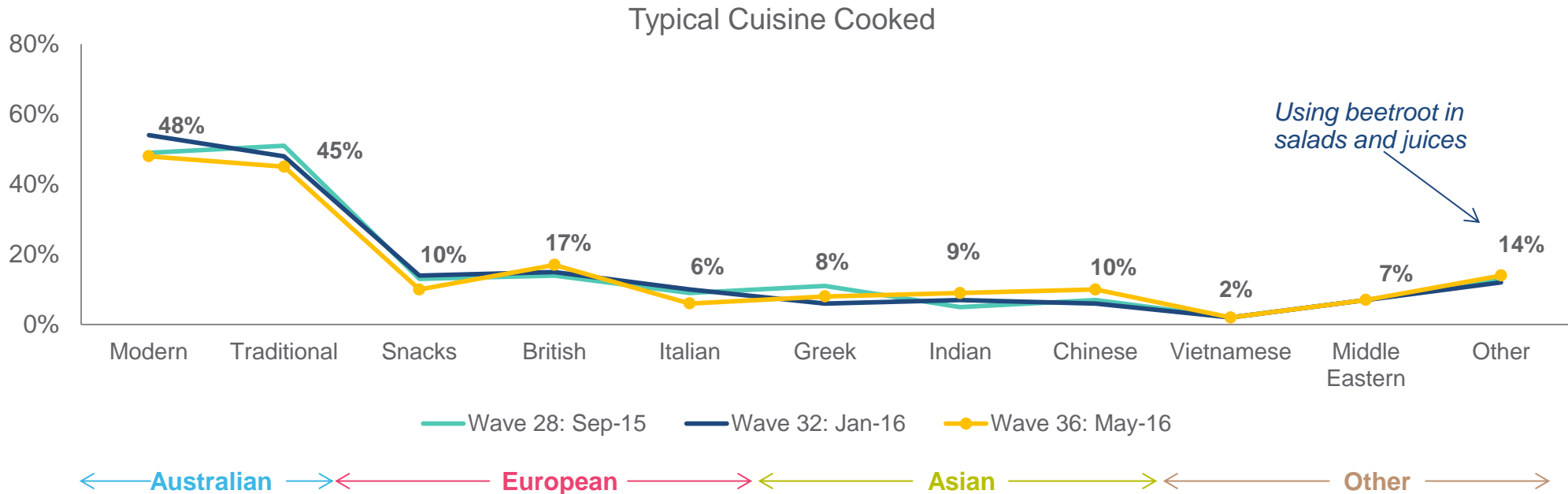
Consumption occasions are generally during dinner and family meals. This wave sees a noticeable decline in beetroot being used in new recipes.

Top 5 Consumption Occasions

	Wave 32	Wave 36
Dinner	61%	62%
Family Meals	51%	50%
Lunch	43%	42%
Weekday Meals	34%	31%
Weekend Meals	31%	29%

7%
used beetroot when cooking a new recipe

▲ 17%, Wave 32



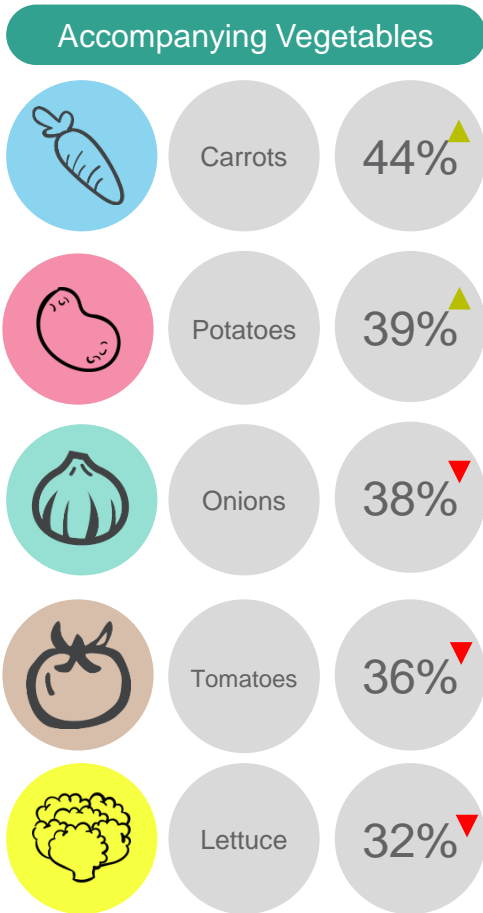
Q10. What cuisines do you cook/consume that use <commodity>?
 Q11. Which of the following occasions do you typically consume/use <commodity>?
 Sample Wave 28 N=206, Wave 32 N=207, Wave 36: N=202



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



The most popular cooking styles for beetroot are boiling and roasting. Consumers opt to serve beetroot with carrots, potatoes and onions.



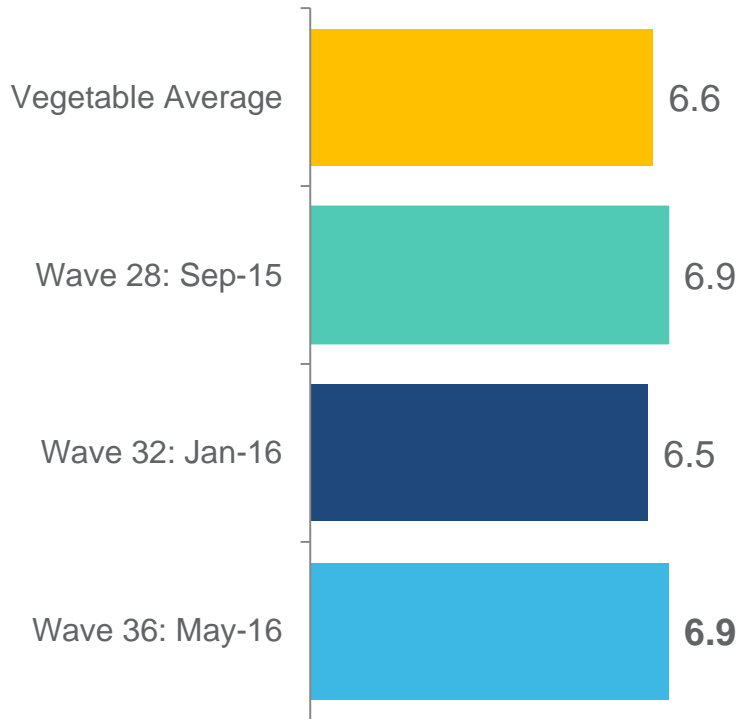
Top Cooking Styles

	Wave 28	Wave 32	Wave 36
Boiling	46%	43%	46%
Roasting	45%	45%	42%
Raw	26%	33%	27%
Baking	27%	25%	24%
Steaming	20%	20%	18%
Soup	14%	12%	15%
Slow Cooking	14%	14%	13%
Stir frying	7%	9%	8%
Other	6%	7%	7%
Saut�eing	5%	3%	6%

Q9. How do you typically cook <commodity>?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
Sample Wave 28 N=206, Wave 32 N=207, Wave 36: N=202



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



Q14. When purchasing <commodity>, how important is Provenance to you?
Mean scores out of 10.
Sample Wave 28 N=206, Wave 32 N=207, Wave 36: N=202

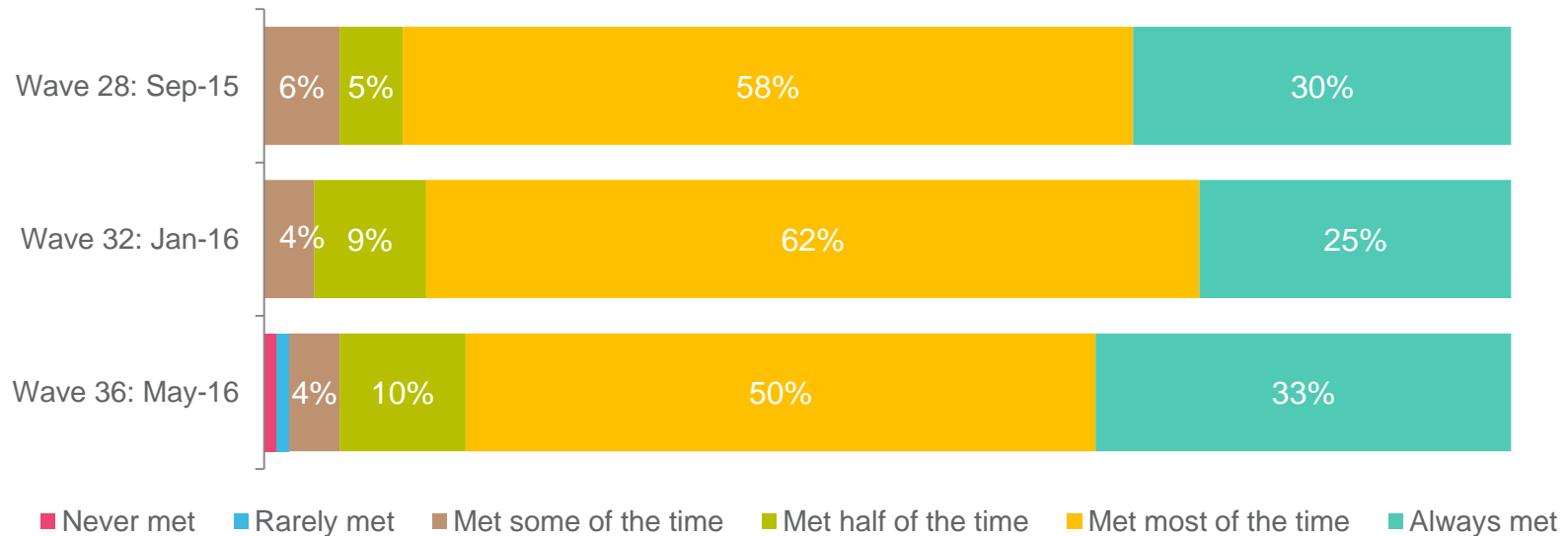


Consumers expect beetroot to remain fresh for just under 10 days once purchased. This wave sees an indicative increase in freshness expectations always being met.

Expected to stay fresh for 9.6 days

- ▲ 10.3 times, Wave 28
- ▲ 9.7 times, Wave 32

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 28 N=206, Wave 32 N=207, Wave 36: N=202



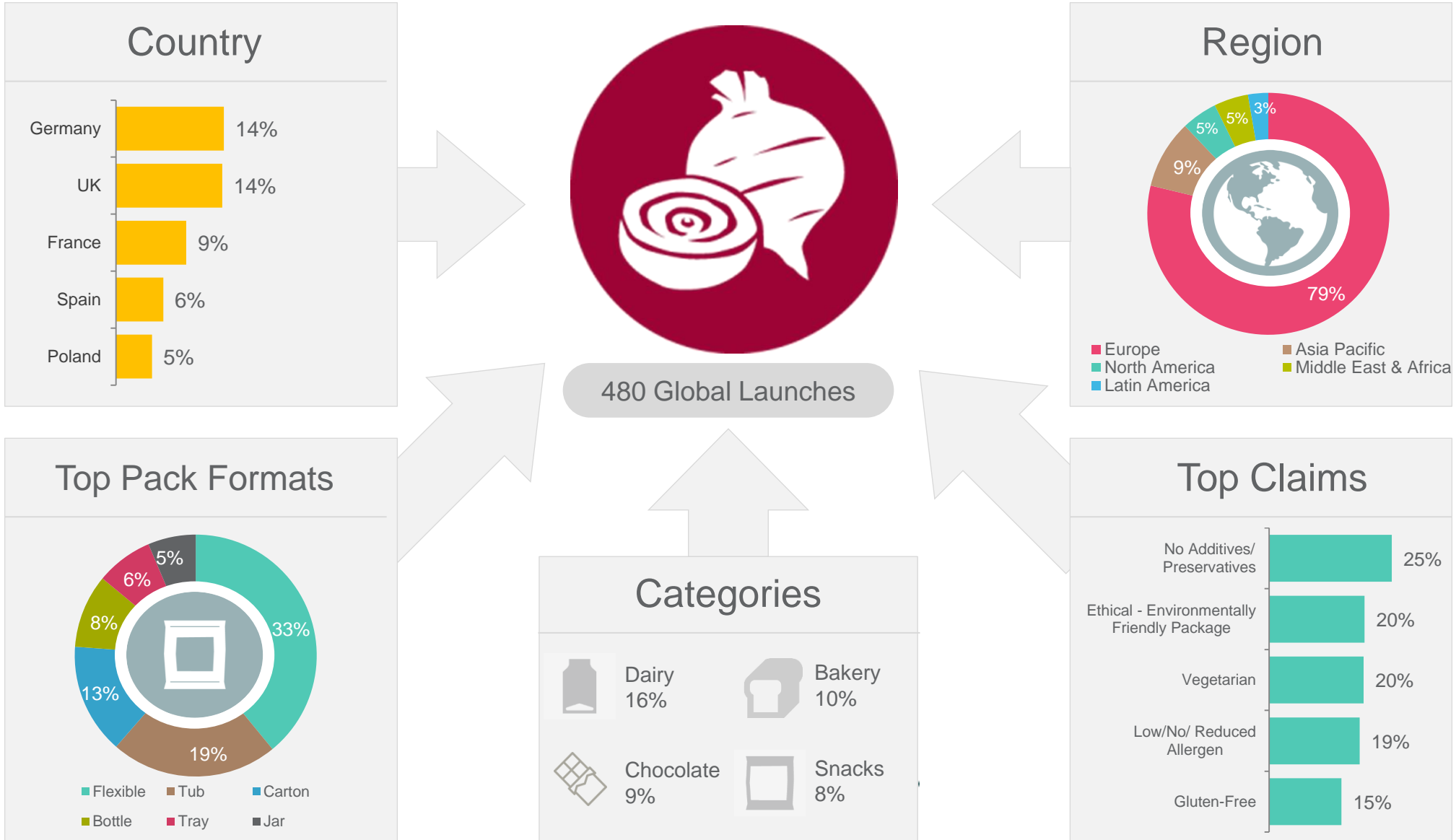
Trends: Beetroot



Beetroot Global NPDs

February – May 2016

There were 480 products containing beetroot as an ingredient launched globally in the last three months. The majority of these launches occurred in Europe, in particular Germany and UK. Products were launched in dairy, bakery, chocolate and snacks.





Beetroot Product Launches: Last 3 Months (February – May 2016) Summary

- There were 480 global beetroot products launched globally over the last three months.
- There were 4 products launched in Australia this wave.
- The majority of products were launched in Europe (79%). Key countries for launches were Germany (14%) and UK (14%).
- Flexible packaging was the most common format used (33%). Tubs were also popularly utilised (19%).
- Top launch categories were dairy (16%), bakery items (10%), chocolate (9%), and snacks (8%).
- Popular claims were around no additives/preservatives (25%), and ethical/environmentally friendly packaging (20%).
- The most innovative beetroot product launched was Beetroot Spaghetti from South Africa (examples of these can be found in the following pages).



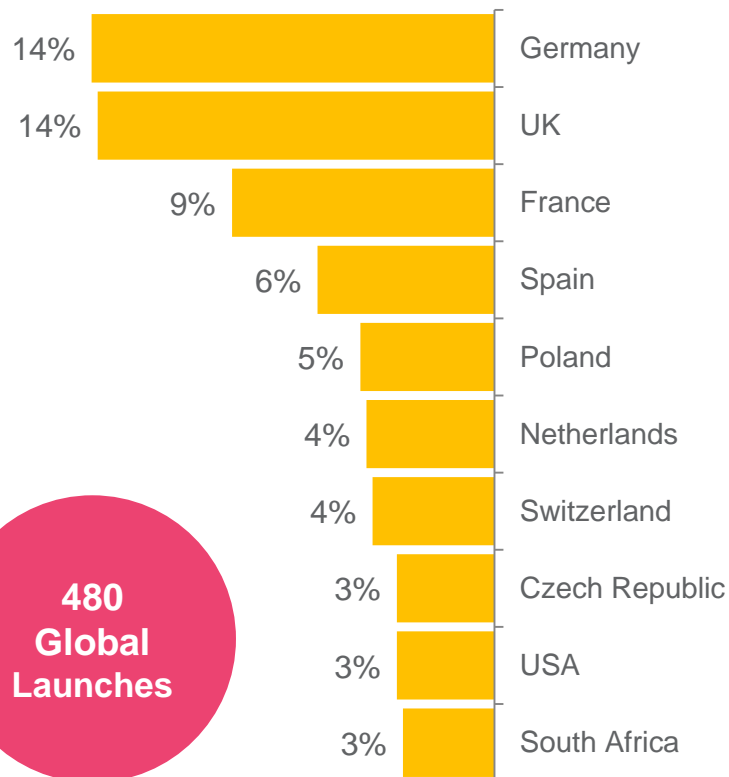
Source: Mintel (2016)





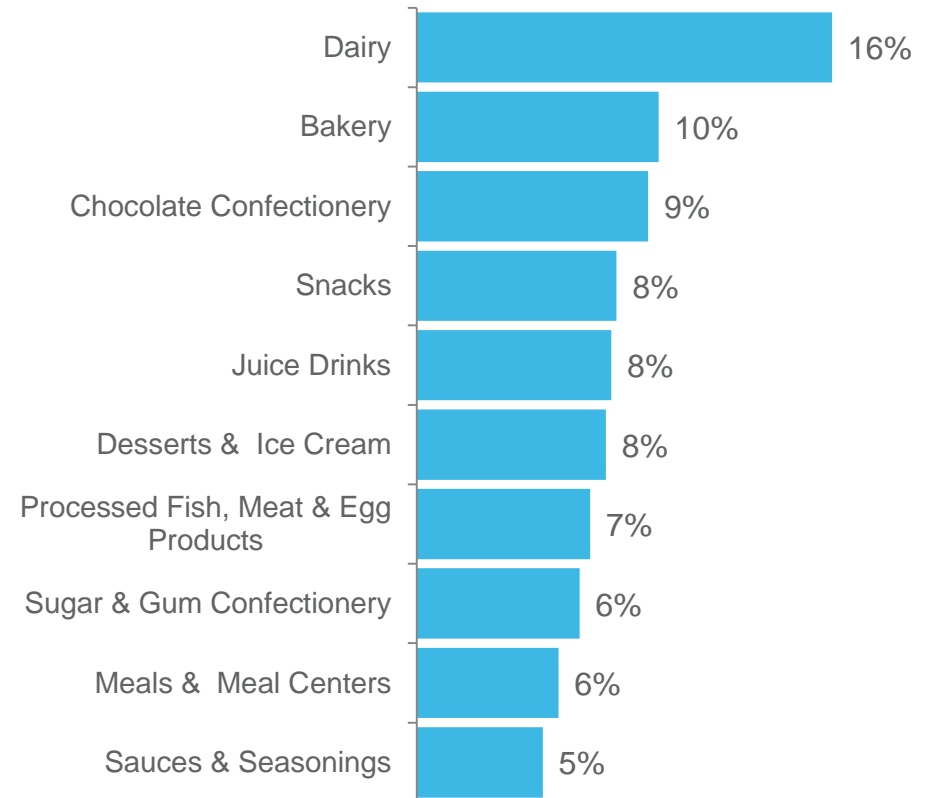
Consistent with the previous wave, Germany and the UK were the key countries for product launches. The key categories for launches included dairy, bakery and chocolate confectionery.

Top Launch Countries



480
Global
Launches










Top Launch Categories














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

Pack Formats Used

Global		Flexible	33%
		Tub	19%
		Carton	13%
Europe		Flexible	30%
		Tub	23%
		Carton	13%
Asia Pacific		Flexible	39%
		Bottle	14%
		Rigid box	11%

Top Claims Used

Global		No Additives/Preservatives	25%
		Ethical - Environmentally Friendly Package	20%
		Vegetarian	20%
Europe		No Additives/Preservatives	23%
		Ethical - Environmentally Friendly Package	20%
		Vegetarian	18%
Asia Pacific		Vegetarian	43%
		No Additives/Preservatives	32%
		Social Media	23%

»»» Innovative Beetroot Launches: L3M (February – May 2016)

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

Chef Select Chicory and Bacon Filled Girasoli Pasta (Spain)

Chef Select Pasta Alimenticia al Huevo Rellena de Achicoria y Panceta (Chicory and Bacon Filled Girasoli Pasta) has been added to the range. The product retails in a 250g pack that serves two.



Claims:
N/A

Hübner Iron Vital F Natural Dietary Supplement (Norway)

Hübner Iron Vital F Jerntilskudd med B-Vitaminer (Iron Vital F Natural Dietary Supplement) is now available. The product contains iron and vitamins and is based on beetroot, cherries, apple and herbs. According to the manufacturer, iron, vitamin C, riboflavin, and vitamin B12 contribute to a normal energy metabolism, a functioning immune system, and reduced fatigue and exhaustion.



Claims:
No Additives/Preservatives, Other (Functional), Vegetarian, Botanical/Herbal, Antioxidant, Immune System (Functional), Vegan, No Animal Ingredients, Energy (Functional)

Jumbo Beetroot Soup with Honey and Lemon Juice (Netherlands)

Jumbo Rode Bieten Soep Met Honing En Citroensap (Beetroot Soup with Honey and Lemon Juice) has been repackaged. This microwaveable product now retails in a newly designed 570ml pack featuring the Bewuste Keuze (Conscious choice) logo.



Claims:
Microwaveable

»»» Innovative Beetroot Launches: L3M (February – May 2016)

Woolworths Food Beetroot Spaghetti (South Africa)

Woolworths Food Beetroot Spaghetti can be used as a pasta alternative or enjoyed as a vegetable accompaniment, or used as a base for salads. The product is washed and ready-to-cook, and can be microwaved in two to three minutes. It retails in a 200 pack.



Claims:
Microwaveable, Ease of Use

Toppo Chickpea Spread with Beetroot (Czech Republic)

Toppo Cizrnová Pomazánka s Cervenou Repou (Chickpea Spread with Beetroot) is now available. This gluten-free product is high in fibre and contains no added preservatives. It retails in a 100g pack.



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

Rainbow Agro Beetroot Humus Dip (India)

Rainbow Agro Beetroot Humus Dip is a freshly made Mediterranean styled chickpea dip that is described as tangy and creamy, full of protein, fibre and low in fat. It is suitable for vegetarians, contains no artificial colours, flavours, preservatives or additives and retails in a 100g pack featuring Facebook, Google+, Twitter and Instagram logos.



Claims:
No Additives/Preservatives, High/Added Fiber, Low/No/Reduced Fat, Vegetarian, Social Media

Be Fresh! Piña Colada Juice (Spain)

Be Fresh! Piña Colada (Piña Colada Juice) is now available. The product contains red grape, forest fruit and apple. It retails in a 750ml pack.



Claims:
N/A

»»» Innovative Beetroot Launches: L3M (February – May 2016)

Roshd Red Velvet Cake Powder (Iran)

Roshd Red Velvet Cake Powder is now available. This premium quality and halal certified product is quick to prepare and needs the addition of water, oil and eggs. It includes a cream powder, contains no preservatives, and retails in a 600g pack, featuring preparation instructions, a QR code, and the Instagram logo.



Claims:
No Additives/Preservatives, Premium, Halal, Time/Speed, Social Media

Farm Lander Crispy Beetroot & Celery Cubes (Czech Republic)

Farm Lander Cervená Repa & Celer Krupavé Kostky (Crispy Beetroot & Celery Cubes) are now available. The 100% natural product retails in a 60g pack.



Claims:
All Natural Product

M&S Beetroot, Red Onion & Goat's Cheese in a Spelt & Rye Pastry Case (Ireland)

M&S Beetroot, Red Onion & Goat's Cheese in a Spelt & Rye Pastry Case is now available. This vegetarian and ready to eat hot or cold product is described as a pastry case made with spelt and rye, with goat's cheese and crème fraîche custard filling, topped with marinated beetroot and red onion.



Claims:
Vegetarian, Cardiovascular (Functional), Ethical - Environmentally Friendly Package, Ease of Use, Low/No/Reduced Saturated Fat

La Grande Épicerie de Paris Grated Beetroot (France)

La Grande Épicerie de Paris Barquettes de Bettraves Rapée (Grated Beetroot) is now available. The product retails in a 0.371kg pack.



Claims:
N/A



Australian Beetroot Launches: L3M (February – May 2016)

Red Rock Deli Special Edition Roast Pork & Chinese Five Spice Deli Style Potato Chips

Red Rock Deli Special Edition Roast Pork & Chinese Five Spice Deli Style Potato Chips are made with the finest Australian potatoes roughly cut and slow-cooked in sunflower oil. These chips are seasoned with the flavour of succulent roast pork seasoned with oriental five spice. This MSG-free product contains natural flavours and natural colours and 75% less saturated fat. It is retailed in a 90g pack.



Claims:
No Additives/Preservatives, Limited Edition, Low/No/Reduced Saturated Fat

Woolworths Created with Jamie Beetroot & Dill Cured Salmon with Gin

Woolworths Created with Jamie Beetroot & Dill Cured Salmon with Gin has been sustainably sourced and is ready to eat. This Tasmanian salmon has been cured in beetroot to give a deep pink colour and a subtle sweetness. The fresh flavours of dill and gin provide a finish along with a buttery texture. This product is a good source of protein and is said to be delicious torn over a fresh salad. It retails in a 100g recyclable pack featuring the Two Health Star Rating symbol.



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

Yarra Valley Preserves Beetroot Relish

Yarra Valley Preserves Beetroot Relish is said to be delicious on burgers and sausages, or mixed with sour cream or creamed cheese to make a beetroot dip. This gluten-free product retails in a 270g pack.



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

Bickford's Harvest Blend Crimson 100% Fruit N' Veg Juice

Bickford's Harvest Blend Crimson 100% Fruit N' Veg Juice is full of antioxidants with an all natural flavour. It contains no added sugar and consists of beetroot, carrots, plums and pomegranates. The product retails in a 1L recyclable bottle.



Claims:
Low/No/Reduced Sugar, Antioxidant, Ethical - Environmentally Friendly Package

A close-up photograph of several sweetpotatoes with reddish-brown skin and some yellowish-orange spots. A large, dark grey circle is overlaid in the center of the image.

Sweetpotatoes.



Consumption and purchase has slightly increased this wave. Consumers continue to purchase sweetpotatoes from mainstream retailers, with a noticeable increase in purchase from Aldi over the last three waves.

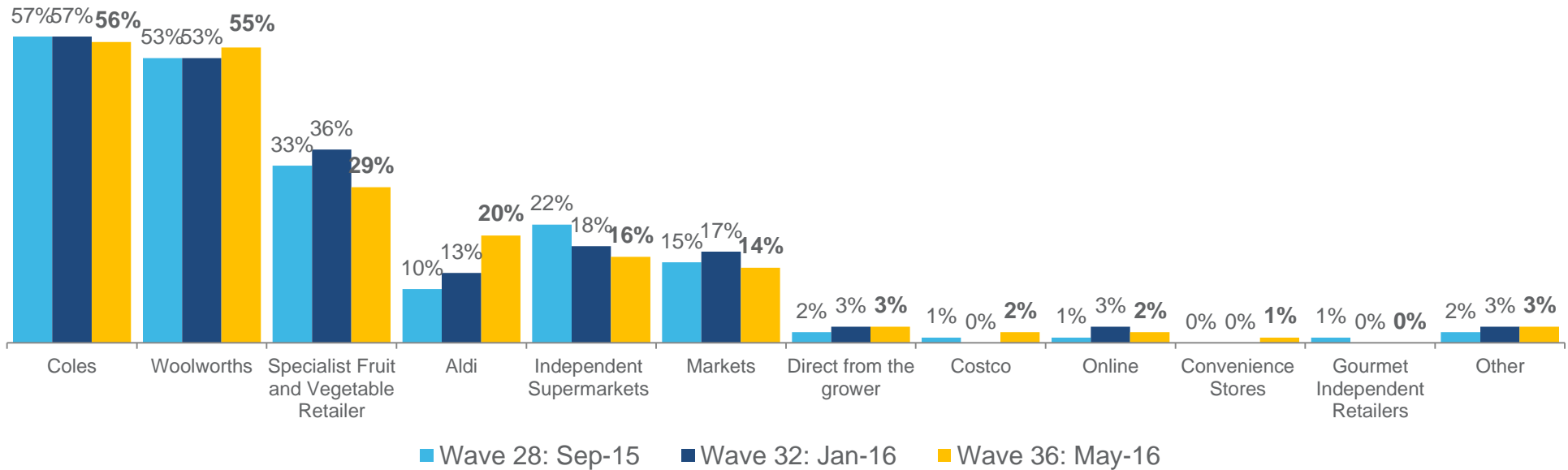


▼ 3.4 times, Wave 28
▼ 3.4 times, Wave 32



▼ 7.7 times, Wave 28
▼ 7.8 times, Wave 32

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 28 N=206, Wave 32 N=202, Wave 36 N=205



Average Spend and Price Sensitivity.



Average weight of purchase

The average consumer typically purchased **1.3kg** of sweetpotatoes in May 2016, which has increased over the last three waves.

- ▼ 1.1kg, Wave 28
- ▼ 1.2kg, Wave 32



Recalled last spend

The average recalled last spend for sweetpotatoes was **\$3.80**.

- ▼ \$3.20, Wave 28
- ▼ \$3.60, Wave 32



Value for money

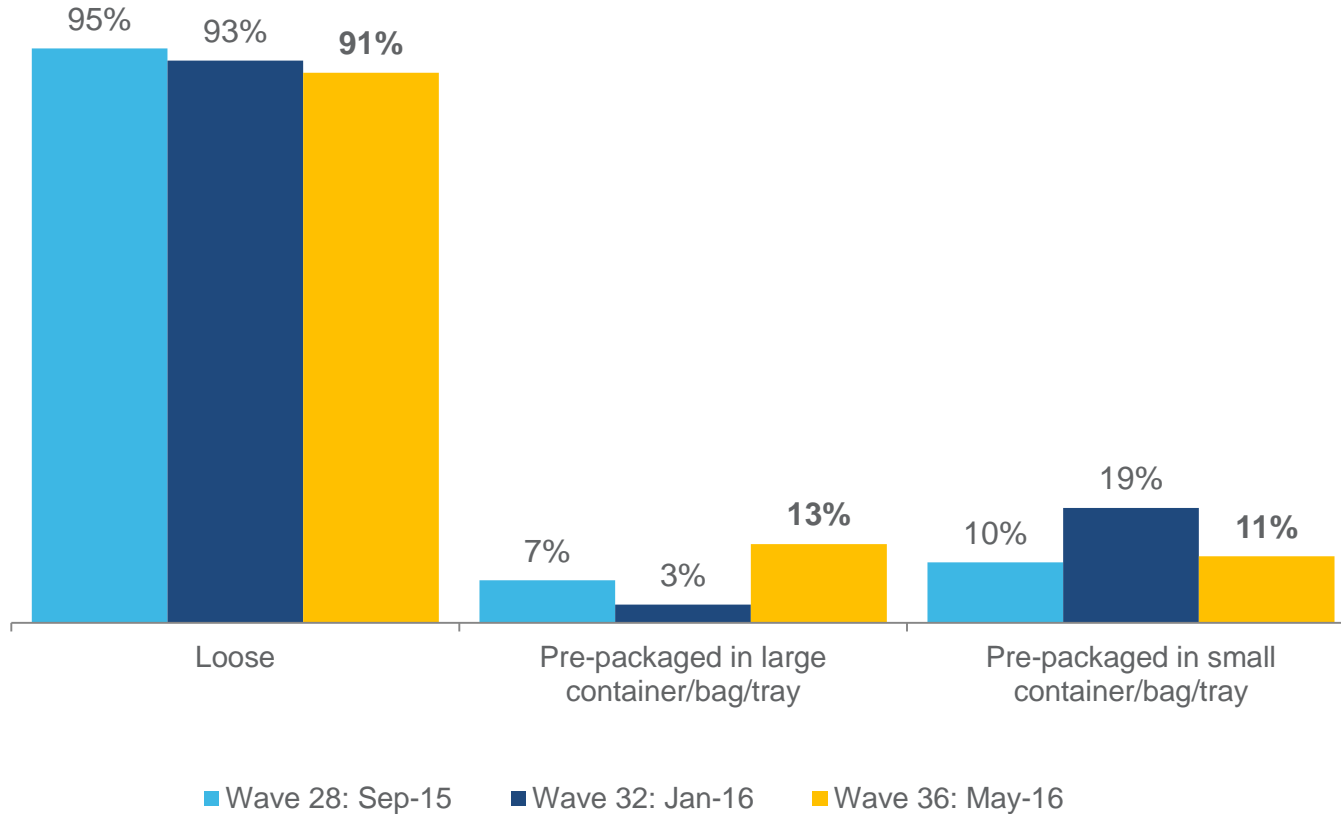
On average, consumers perceived sweetpotatoes to be good value for money (**6.8/10**), which has increased this wave.

- ▼ 6.6/10, Wave 28
- ▼ 6.5/10, Wave 32

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 28 N=206, Wave 32 N=202, Wave 36 N=205



The majority of consumers are purchasing individual sweetpotatoes. This wave sees an increase in purchase of pre-packaged large formats.

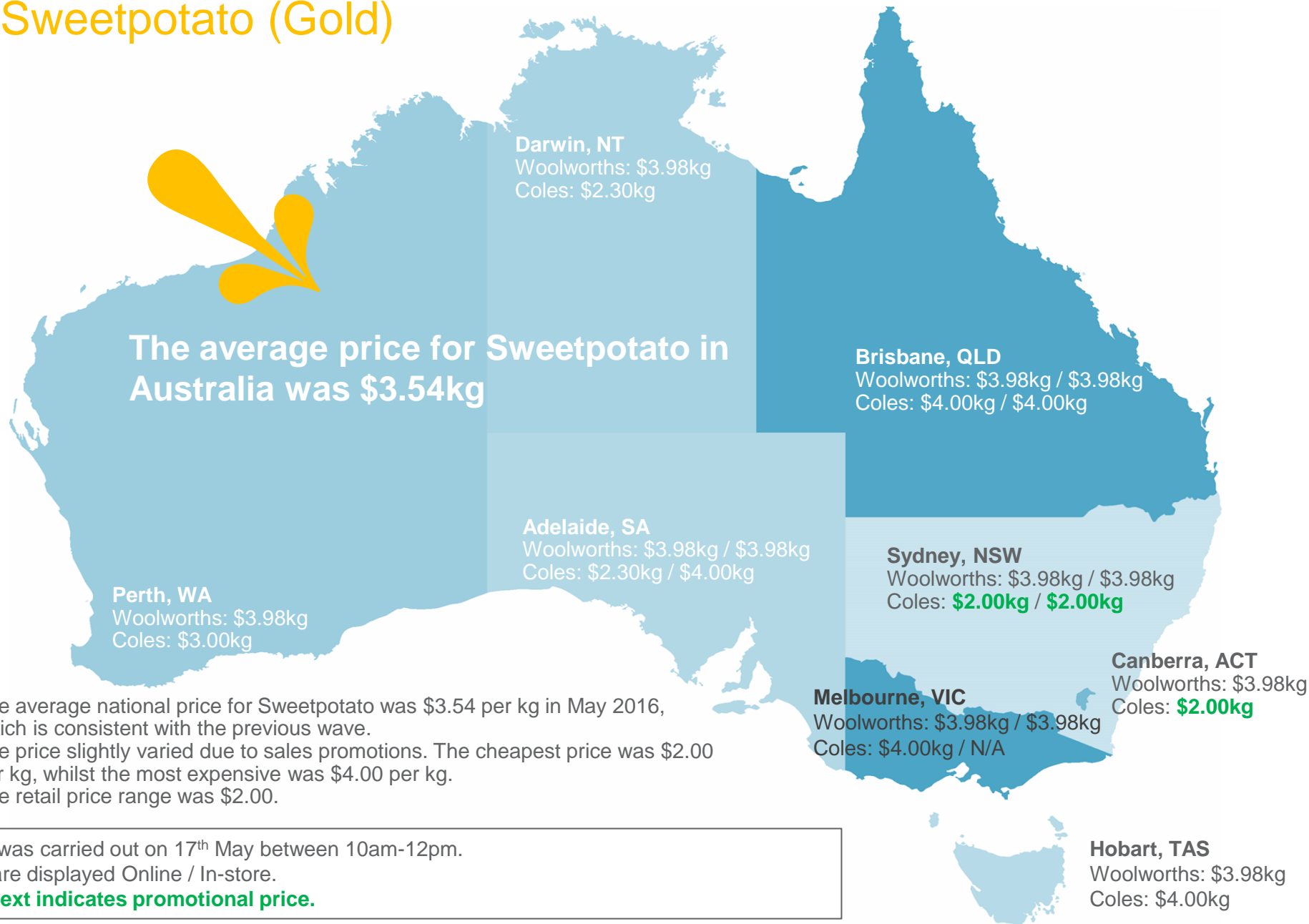


Q4b. In what fresh formats do you typically purchase Sweetpotato?
Sample Wave 28 N=206, Wave 32 N=202, Wave 36 N=205

Online and In-store Commodity Prices



Sweetpotato (Gold)

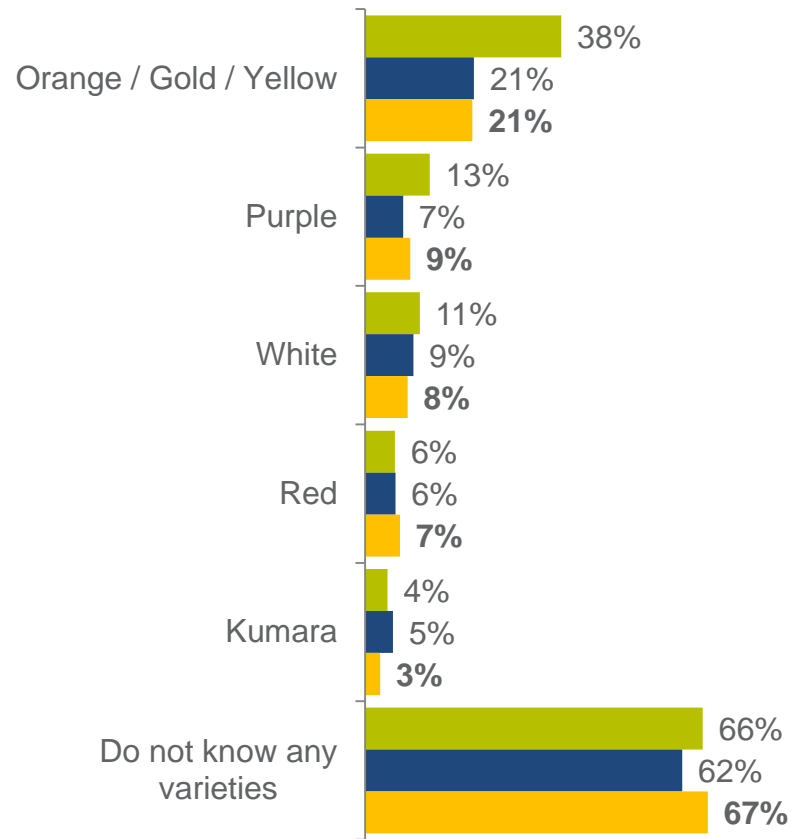


- The average national price for Sweetpotato was \$3.54 per kg in May 2016, which is consistent with the previous wave.
- The price slightly varied due to sales promotions. The cheapest price was \$2.00 per kg, whilst the most expensive was \$4.00 per kg.
- The retail price range was \$2.00.



Two thirds of consumers are unable to recall a type of sweetpotato.

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



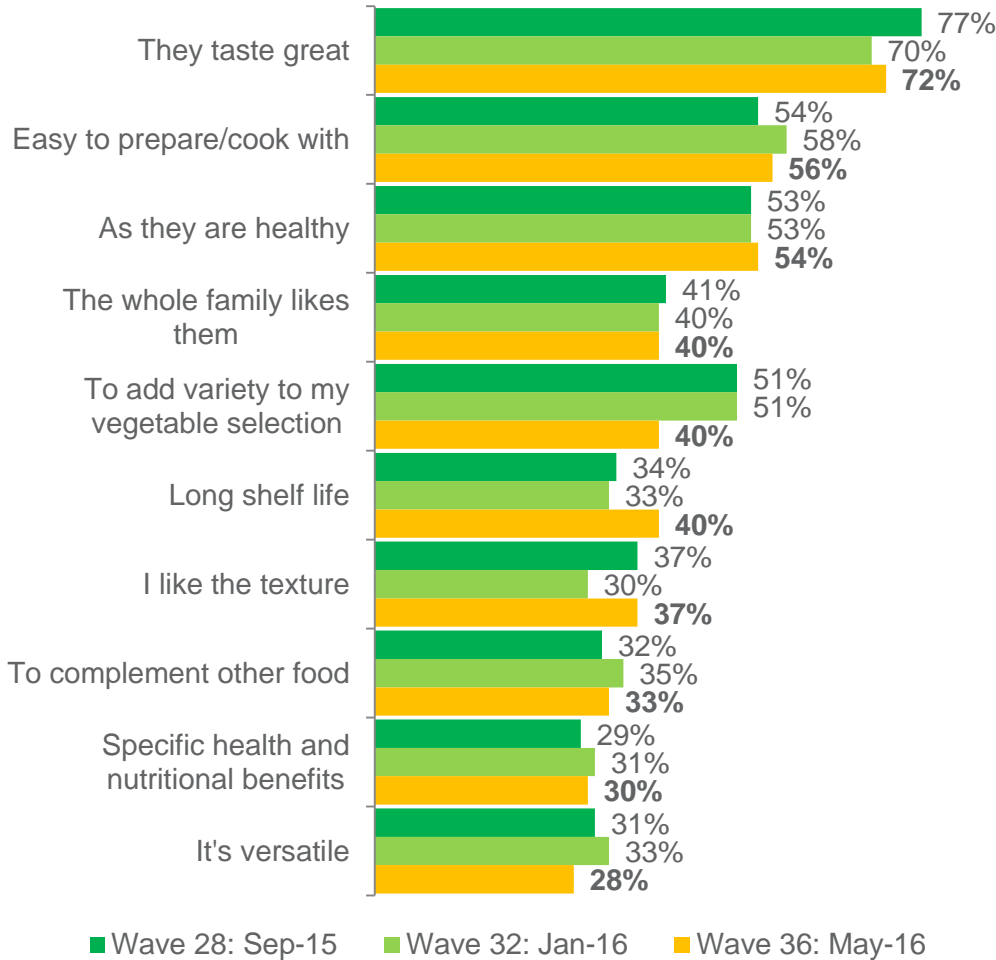
■ Wave 28: Sep-15 ■ Wave 32: Jan-16 ■ Wave 36: May-16



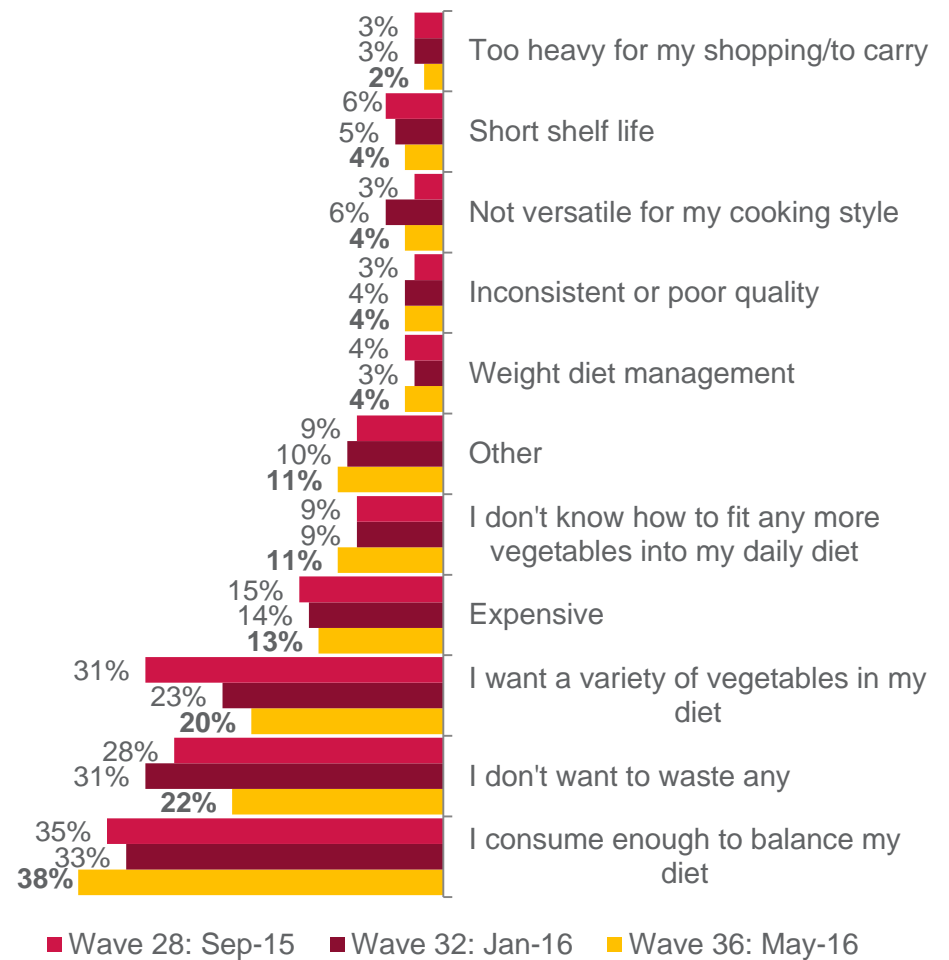
Taste, ease of preparation and health remain the key drivers for sweetpotato purchases. Already consuming enough and not wanting to waste any are the key barriers to purchase.



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 28 N=206, Wave 32 N=202, Wave 36 N=205



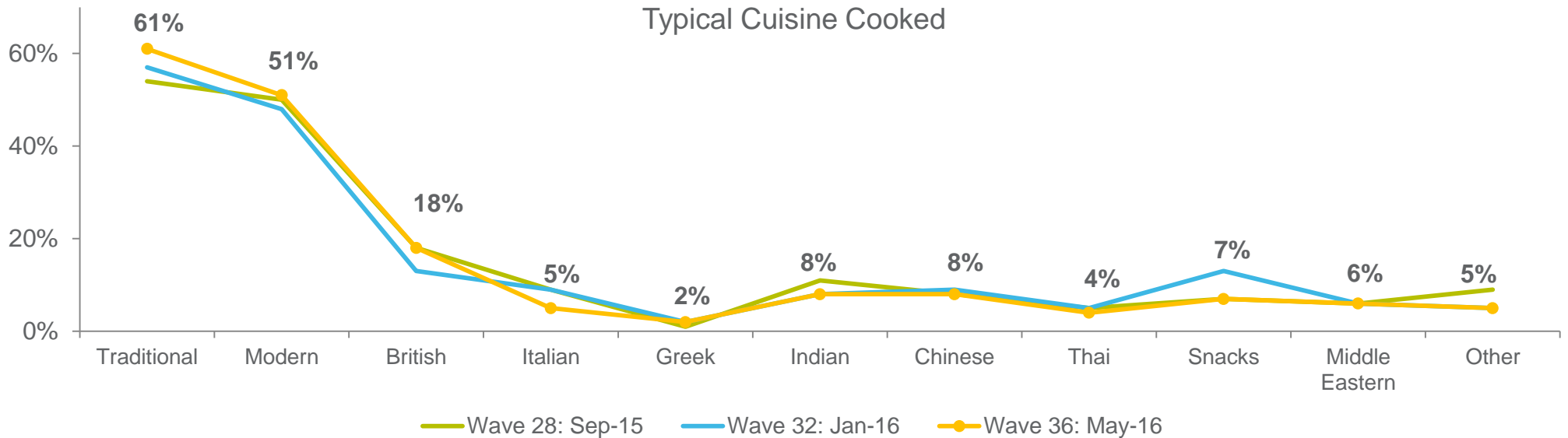
Sweetpotato cooking remains heavily skewed towards Australian cuisines. Consumption occasions tend to be based around dinner.

Top 5 Consumption Occasions

	Wave 32	Wave 36
Dinner	65%	72%
Family meals	68%	64%
Weekday meals	43%	40%
Weekend meals	35%	37%
Quick Meals	30%	21%

10%
used sweet-potatoes when cooking a new recipe

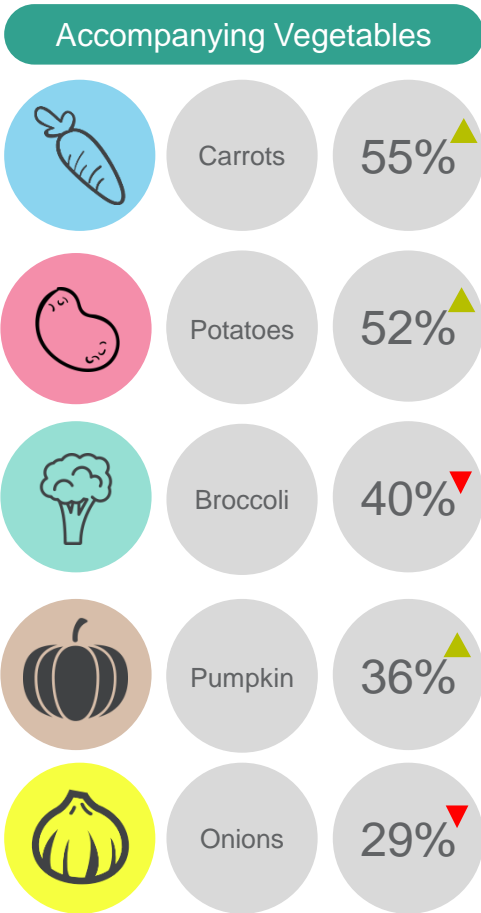
▲ 12%, Wave 32



Q10. What cuisines do you cook/consume that use <commodity> ?
 Q11. Which of the following occasions do you typically consume/use <commodity> ?
 Sample Wave 28 N=206, Wave 32 N=202, Wave 36 N=205



Consistent with previous waves, consumers prefer to roast, bake and mash sweetpotatoes. Sweetpotatoes are generally served with carrots, potatoes and broccoli.



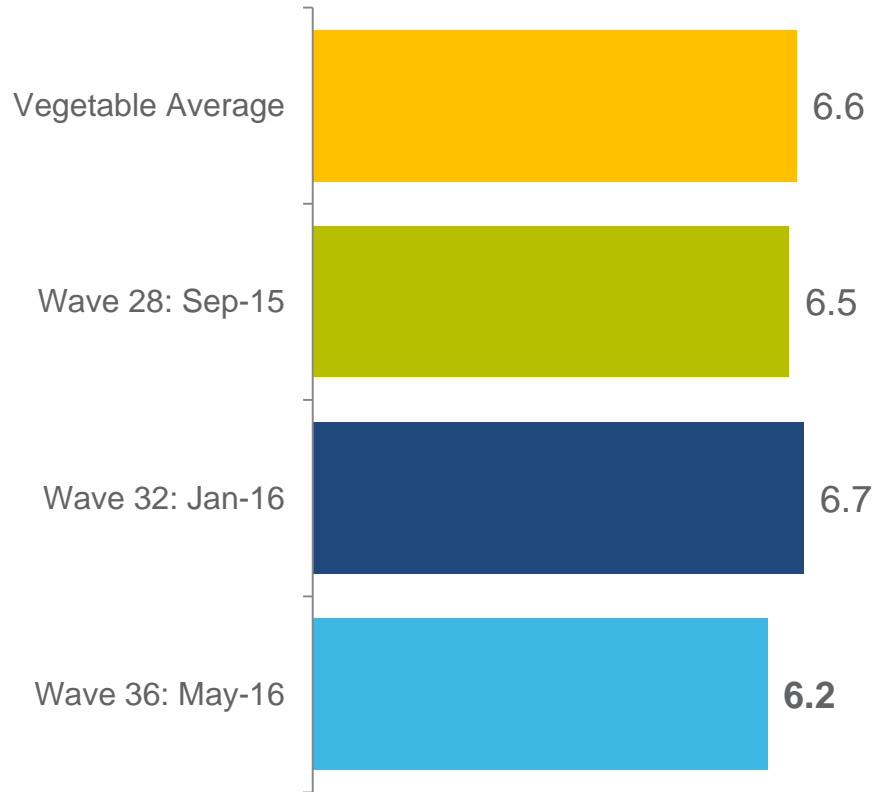
Top Cooking Styles

	Wave 28	Wave 32	Wave 36
Roasting	70%	64%	62%
Baking	43%	39%	49%
Mashing	50%	50%	42%
Boiling	33%	32%	33%
Steaming	26%	26%	27%
Soup	26%	18%	20%
Slow Cooking	16%	17%	16%
Microwave	15%	20%	15%
Frying	17%	13%	12%
Grilling	6%	7%	7%

Q9. How do you typically cook <commodity> ?
 Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
 Sample Wave 28 N=206, Wave 32 N=202, Wave 36 N=205



Importance of sweetpotato provenance has declined this wave and now sits below the Vegetable Average.



Q14. When purchasing <commodity>, how important is Provenance to you?
Mean scores out of 10.
Sample Wave 28 N=206, Wave 32 N=202, Wave 36 N=205

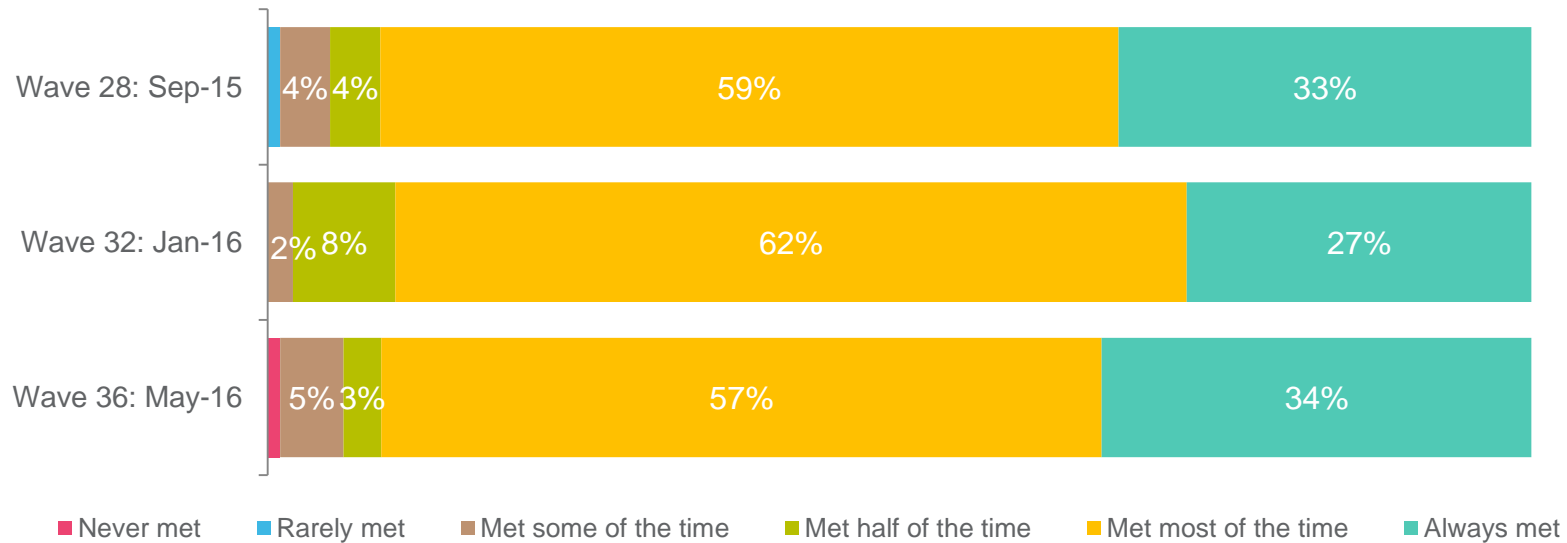


Sweetpotatoes are expected to stay fresh for just under two weeks. These expectations are being met at least most of the time, with a noticeable increase in expectations always being met this wave.

Expected to stay fresh for **12.8 days**

▲ 13.1 days, Wave 28
▼ 12.5 days, Wave 32

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 28 N=206, Wave 32 N=202, Wave 36 N=205



Trends:
Sweetpotatoes.



Sweetpotato Global NPDs

February – May 2016

There were 1864 global launches over the past three months that contained Sweetpotato as an ingredient, substantially lower than the previous wave (2426). These were predominantly launched in Europe and Asia Pacific, particularly in USA and Germany. Key categories for launches were skincare, snacks and bakery items.





Sweetpotato Product Launches: Last 3 Months (February – May 2016) Summary

- There were 1864 global launches over the past three months that contained Sweetpotato as an ingredient, substantially lower than the previous wave (2426).
- There were 30 products launched in Australia over the last three months.
- Products were predominantly launched in Europe (46%) and Asia Pacific (25%).
- The main category launches were skincare (17%), snacks (11%), and bakery items (10%).
- Common pack formats used were flexible packaging (30%), bottles (15%) and tubes (11%).
- Popular claims used on products were botanical/herbal (25%), no additives/preservatives (21%), and moisturising/hydrating (18%).
- The most innovative products launched included a sweet potato, rosemary & thyme oat cereal from Mexico, and sweet potato with cinnamon butter from South Africa. Other examples can be found on the following pages.



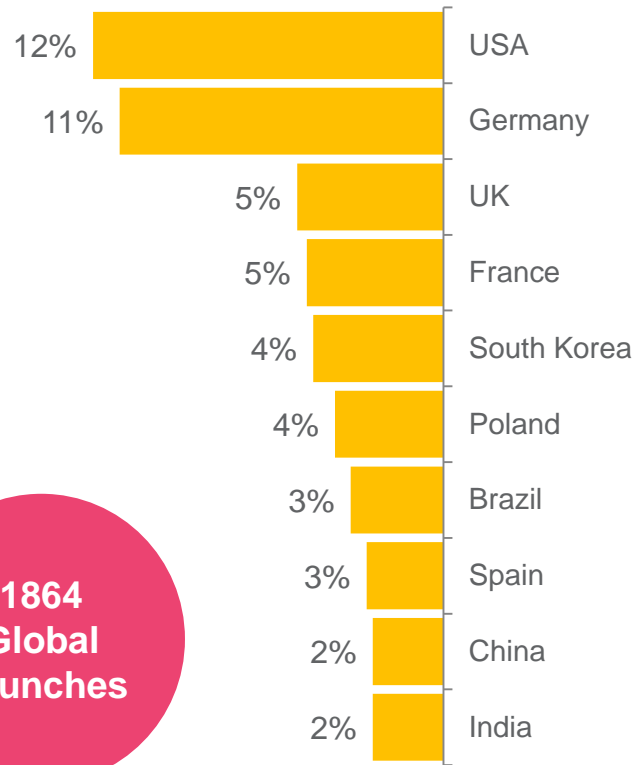
Source: Mintel (2016)





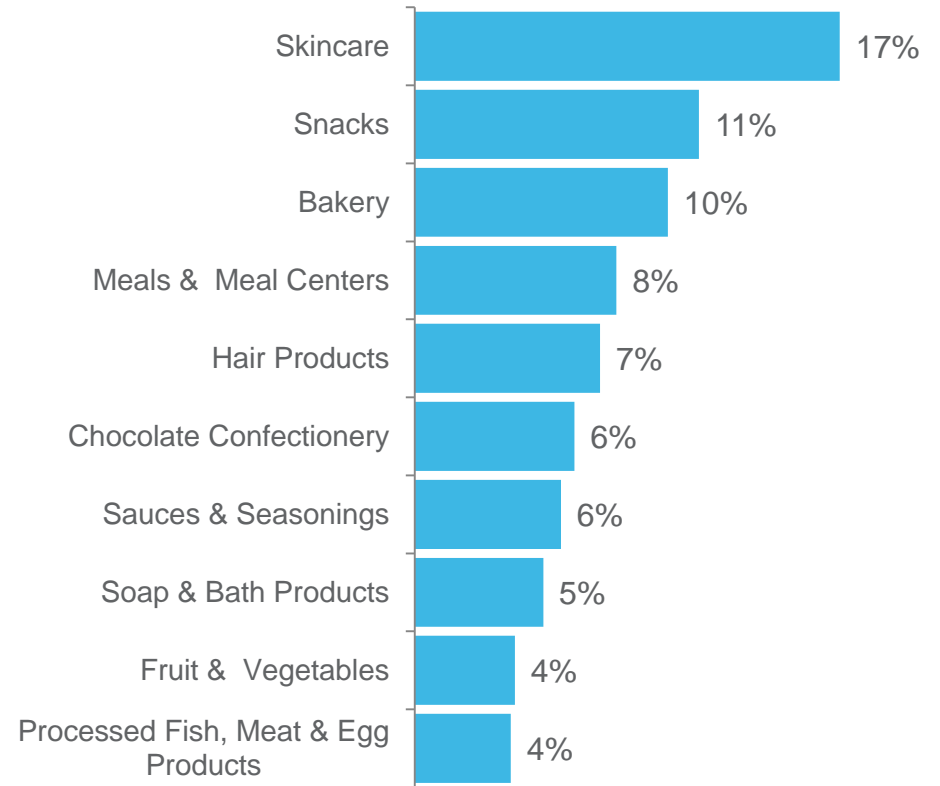
USA and Germany had the greatest number of sweetpotato product launches, consistent with the previous wave. The main categories for products were skincare and snacks.

Top Launch Countries



1864
Global
Launches










Top Launch Categories














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

Pack Formats Used

Global		Flexible	30%
		Bottle	15%
		Tube	11%
Europe		Flexible	27%
		Tube	13%
		Bottle	13%
Asia Pacific		Flexible	38%
		Bottle	17%
		Flexible sachet	8%

Top Claims Used

Global		Botanical/Herbal	25%
		No Additives/Preservatives	21%
		Moisturising/Hydrating	18%
Europe		Botanical/Herbal	25%
		No Additives/Preservatives	21%
		Moisturising / Hydrating	15%
Asia Pacific		No Additives/Preservatives	21%
		Botanical/Herbal	21%
		Moisturising / Hydrating	15%

Only regions with n >30 are displayed

»»» Innovative Sweetpotato Launches: L3M (February – May 2016)

Vigilant Eats Sweet Potato, Rosemary & Thyme Oat Cereal (Mexico)

Vigilant Eats Cereal de Avena Sabor a Camote, Romero, y Tomillo (Sweet Potato, Rosemary & Thyme Oat Cereal) is now available. This USDA organic and kosher certified cereal contains no gluten, soy, or dairy, is suitable for vegans, and contains no genetically modified ingredients. This product can be prepared to the desired texture using cold water, hot water or milk, and retails in a 77g pack.



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

RW García 3 Seed Sweet Potato Crackers (USA)

RW García 3 Seed Sweet Potato Crackers are made with stone ground corn, flaxseed, sesame and chia. The kosher certified product is free from gluten, GMO and is said to be great with any topping. It retails in a 6.5-oz. pack featuring a QR code.



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

FamilyMart Collection Taiwan Plum Flavoured Sweet Potato Sticks (Taiwan)

FamilyMart Collection Taiwan Plum Flavoured Sweet Potato Sticks are made from Taiwanese sweet potato. The product is said to have an aromatic and sweet taste. It does not require thawing and retails in a 125g microwaveable pack.



Claims:
Microwaveable

Woolworths Food Sweet Potato with Cinnamon Butter (South Africa)

Woolworths Food Sweet Potato with Cinnamon Butter is described as a traditional side dish. The vegetarian product is ready in minutes, can be microwaved in the bag and retails in a 600g pack.



Claims:
Microwaveable, Vegetarian, Time/Speed

»»»→ Innovative Sweetpotato Launches: L3M (February – May 2016)

Youjia / Youjoy Sweet Potato Starch (China)

Youjia / Youjoy Hong Shu Dian Fen (Sweet Potato Starch) is now available. This product retails in a 2kg pack featuring the Weibo code and two QR codes.



Claims:
Social Media

Dayu Purple Potato Flavoured Crispy Egg Yolk Cakes (China)

Dayu Zi Shu Dan Huang Su (Purple Potato Flavoured Crispy Egg Yolk Cakes) are described to be crispy, soft and aromatic. This product is free from cane sugar, and retails in a 400g pack containing 15 individual units.



Claims:
Low/No/Reduced Sugar

2 Marias Nutrição Saudável Stage 2 Chicken with Sweet Potato Purée (Brazil)

2 Marias Nutrição Saudável Franguinho com Purê de Batata Doce Segunda Fase (Stage 2 Chicken with Sweet Potato Purée) is now available. This microwavable meal is 100% natural, has been made using ingredients not grown with pesticides, and contains no artificial preservatives, as well as being gluten-free. This product retails in a recyclable and BPA-free 150g pack.



Claims:
No Additives/Preservatives, All Natural Product, Microwavable, Babies & Toddlers (0-4), Gluten-Free, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product

2 Marias Nutrição Saudável Third Stage Feijoada (Brazil)

2 Marias Nutrição Saudável Feijoadinha Terceira Fase (Third Stage Feijoada) is now available. This microwavable meal is 100% natural, has been made using ingredients not grown with pesticides, and contains no artificial preservatives, as well as being gluten-free. This product retails in a recyclable and BPA-free 170g pack.



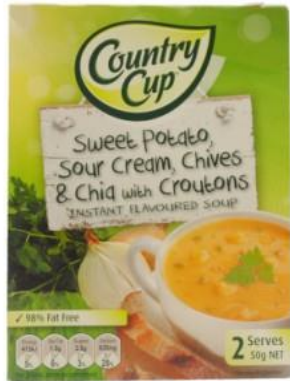
Claims:
No Additives/Preservatives, All Natural Product, Microwavable, Babies & Toddlers (0-4), Gluten-Free, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product



Australian Sweetpotato Launches: L3M (February – May 2016)

Country Cup Sweet Potato, Sour Cream, Chives & Chia with Croutons Instant Soup

Country Cup Sweet Potato, Sour Cream, Chives & Chia with Croutons Instant Soup is 98% fat free. This product retails in a recyclable and resealable 50g pack containing two portions.



Claims:

Low/No/Reduced Fat, Ethical - Environmentally Friendly Package, Convenient Packaging

Woolworths Sweet Potato, Carrot & Chilli with Croutons Soup

Woolworths Sweet Potato, Carrot & Chilli with Croutons Soup Mix is described as a 98% fat free satisfying snack that is quick and easy to prepare. This product contains no artificial colours, flavours or added MSG and just requires the addition of boiling water. It is retailed in a 60g recyclable pack, providing two servings.



Claims:

No Additives/Preservatives, Low/No/Reduced Fat, Ethical - Environmentally Friendly Package, Time/Speed, Ease of Use

Heinz Sweet Potato Bacon & Kale Soup with Ginger

Heinz Sweet Potato Bacon & Kale Soup with Ginger is now available. The microwavable product is described as a hearty blend of tasty sweet potato, smoky flavoured bacon and curly kale with the spice and warmth of ginger. It is made natural colours, is 99% fat-free, and contains no preservatives. It retails in a 300g recyclable pack, featuring cooking instructions and 3.5 out of 5 Health Star rating.



Claims:

No Additives/Preservatives, Low/No/Reduced Fat, Microwaveable, Ethical - Environmentally Friendly Package

V8 Apple Mango Fusion Fruit & Veggie Juice

V8 Apple Mango Fusion Fruit & Veggie Juice provides one serve of veggies and one serve of fruit per 250ml serve, and is a rich source of the powerful antioxidant vitamin C. The product is free from added sugar, preservatives and artificial flavours and colours, and retails in a 1.25L recyclable pack.



Claims:

No Additives/Preservatives, Low/No/Reduced Sugar, Antioxidant, Ethical - Environmentally Friendly Package



In the Media.



General Vegetable News (February – May 2016)

- Australia's horticulture sector fears the delay of the Federal Government's controversial backpacker tax changes will do little to attract foreign workers back to Australia.
- The government has announced a six-month delay to allow for a review of plans to hike taxes on foreign workers. Agricultural and tourism lobby groups have repeatedly said the proposed tax changes, which were due to start in the new financial year, were already stopping workers from coming to Australia.
- Working holidaymakers currently only pay tax on money earned above the \$18,200 tax threshold. The government's change would have seen backpackers taxed at a rate of 32.5 per cent on all earnings from July 1.

www.abc.net.au





Commodity News

(February – May 2016)



- Ikea has launched its new indoor gardening product into stores, bringing home hydroponics to a larger market. It allows consumers to grow their own plants and vegetables inside, without soil or sunlight.
- Units can either be placed in a windowsill to take advantage of natural sunlight or affixed to a specialised low-energy LED lamp to enable cultivation anywhere, at any time of year.
- The chosen cultivars include varieties of herbs, lettuce, pak choy and silverbeet, and take about seven weeks to mature.

www.dezeen.com



- The Australian capsicum market is “steady and strong” as consumer demand and interest in specific varieties continue to grow.
- “We are finding the demand for the tri-colour capsicum pack growing in modest scale,” Kapiris Bros Sales and Marketing Director Steve Tsakoumakis says.
- The main demand and trend has increased for the ‘Blocky’ Bell shaped capsicum variety, this is primarily due to its promotion on popular TV cooking shows.

www.freshplaza.com



There was no Brussels Sprouts specific news to report this wave.



- Integrated disease management will help spinach growers fight the increasing number of downy mildew outbreaks. Downy mildew is a major fungal disease which wipes out spinach crops and causes dull to bright yellow spots on spinach leaves.
- Kevin Walsh, Monsanto’s global technology development lead for spinach urged spinach growers from Australia and New Zealand to adopt integrated disease management for the best chance of growing a marketable, downy mildew free crop. “It’s unwise to rely on disease resistant varieties as the only form of disease management. New downy mildew pathotypes are developing all the time”.

www.weeklytimesnow.com.au

Commodity News

(February – May 2016)



- Surplus, unsold food from Tesco stores is being given to local community groups through the Community Food Connection project with FareShare FoodCloud.
- The food collected through the scheme has helped boost the range on offer at their Breakfast and Lunch Clubs. The most common types of food that are provided include fruit, bread and fresh vegetables including turnips and parsnips.

www.internationalsupermarketnews.com



- Condiment brand and World Food Innovation Awards winner The Foraging Fox has added a third instalment of its beetroot ketchup – this time a “rich, smoky” variety that pairs with barbecued food.
- Packed with vitamins, minerals and antioxidants, The Foraging Fox’s triumvirate of beetroot ketchups pair well with a wide range of food – adding a touch of flavour to meat, fish and eggs, bringing salad dressings to life, and imparting a cheese sandwich with a bit of gusto.

www.foodbev.com



- Waroona farmer Victor Thompson has dug up a sweetpotato weighing 21.8 kilograms, the size of a ‘basketball’.
- Several other sweetpotatoes in the crop were also well oversized, with two of them weighing in at 10.5 kilograms.
- The seedlings were planted in November last year, and left in for four to five months – the usual time it takes for sweetpotatoes to mature.

www.watoday.com.au



Project Harvest Background & Methodology.



Background & Setting the Scene.

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

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

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

This wave's report (Wave 36, May 2016) focuses on:

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

This project has been funded by Horticulture Innovation Australia 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=200 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 (Asian Vegetables, Capsicum, Brussels Sprouts, Spinach, Parsnip, Beetroot and Sweetpotatoes) within the last month
- ⇒ Were the main or joint grocery buyer.

	Asian Vegetables n=301	Capsicum n=306	Brussels Sprouts n=302	Spinach n=300	Parsnip n=202	Beetroot n=202	Sweetpotatoes n=205
Gender							
Male	37%	35%	34%	36%	40%	52%	41%
Female	63%	65%	66%	64%	60%	48%	59%
Age							
18-24 y.o.	1%	1%	1%	2%	2%	2%	2%
25-34 y.o.	14%	12%	10%	14%	10%	14%	19%
35-44 y.o.	12%	13%	12%	19%	4%	11%	15%
45-54 y.o.	19%	15%	17%	18%	21%	24%	17%
55-64 y.o.	29%	33%	30%	22%	32%	27%	25%
65+ y.o.	26%	25%	30%	25%	31%	22%	22%
Household							
Single Income no Kids	21%	17%	19%	19%	16%	22%	20%
Double Income no Kids	16%	16%	15%	17%	16%	16%	17%
Young Families	12%	11%	11%	14%	9%	9%	13%
Established Families	24%	21%	18%	21%	22%	24%	24%
Empty Nesters	28%	34%	37%	28%	37%	30%	26%
Location							
New South Wales	28%	31%	28%	30%	21%	24%	22%
Victoria	23%	20%	20%	21%	26%	21%	22%
South Australia	9%	13%	14%	12%	11%	9%	8%
Queensland	18%	14%	17%	16%	17%	26%	30%
Western Australia	14%	13%	12%	16%	13%	16%	9%
Tasmania	5%	6%	7%	3%	7%	1%	4%
Australian Capital Territory	3%	2%	1%	1%	2%	2%	4%
Northern Territory	1%	2%	1%	1%	1%	1%	0%



Trends Research: Our Approach

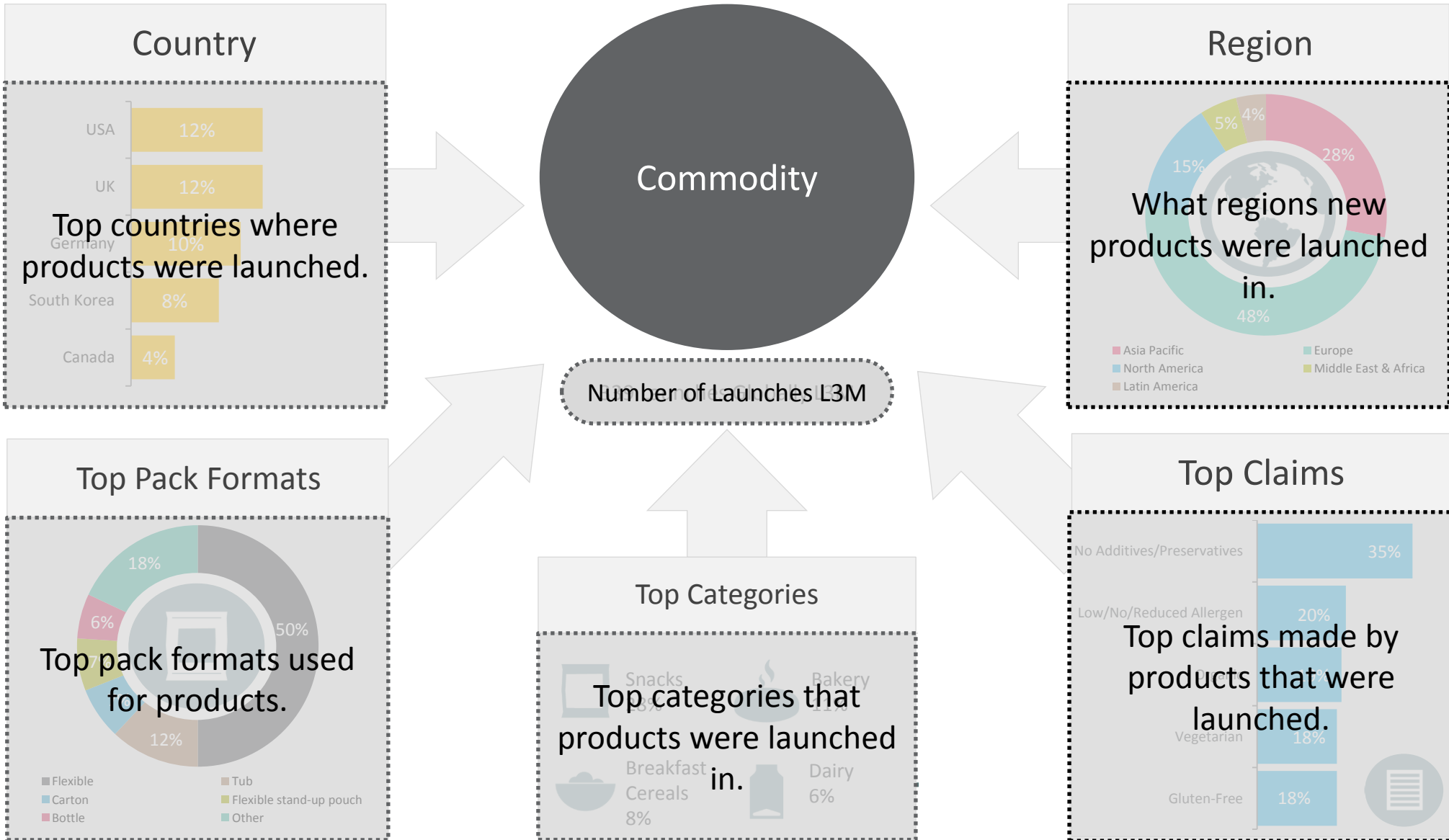


- ▶ Colmar Brunton has used a combination of both desk research and in the field market research to explore the trends for each vegetable commodity being tracked this month.
- ▶ Our main source of secondary data for this report was collected from Mintel Global New Products Database (GNPD).
- ▶ This data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

Product Launches Last 3 Months (L3M)

How to Read Summaries

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





Thanks.

