Project Harvest Monthly Tracker Report.

Wave 37, June 2016

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

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

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Wave 37:
Executive Summary

Industry Insight.

Previous research as part of Project Harvest suggested that 77% of consumers want vegetables to be more prominent in meals they eat out of home and this is exactly the idea starting to emerge through dietary guidelines in countries such as the Netherlands.

In a significant departure from previous guidelines, earlier this year the Health Council of the Netherlands formulated their guidelines focusing on individual foods, rather than individual nutrients, and on the nation's ten most prevalent chronic diseases related to unhealthy eating patterns.

The most revolutionary aspect of the new guideline was a recommended decrease in the consumption of meat, leaving the majority of the diet plant-based. Specifically, recommendations included the following:

- Eat vegetables on a daily basis
- Eat fruit on a daily basis
- Eat dairy on a daily basis
- Eat whole grain brown bread on a daily basis
- Limit consumption of meat to no more than 500g weekly
- Eat fish on a weekly basis
- Choose vegetable-based proteins on a regular basis
- In comparison, the 2013 Australian guidelines recommend up to three serves of lean meats, poultry, fish, eggs, tofu, nuts, seeds and/or legumes a day, which equates to a maximum of 195g of red meat a day – more than double that recommended by the Netherlands.

It will be interesting to see whether the next iteration of the Australian Dietary guidelines follow the Netherlands' lead, recommending a lower consumption of meat and allowing vegetables to take centre stage – a move that many consumers would welcome.

Beans Grower Action Plan.

Wave 37 Fast Facts – Beans

- Beans have a strong level of importance and endorsement, sitting just above the Vegetable Average.
- Beans are purchased around 4 times per month and are consumed 9 times per month, both slightly lower than the previous wave.
- Consumers purchase 590g of beans per shop. Recalled last spend is $3.40. Overall, consumers perceive beans to be good value for money.
- National price tracking indicated the average price for green beans in June was $6.63 per kg.
- Awareness of bean types decreased for most varieties this wave. Broad remained the most recalled type, followed by Green and Runner.
- Beans are expected to stay fresh for just over a week, and freshness expectations are met most of the time.
- Ease of preparation and health are the main influences on purchase of beans. Not wanting to waste any and already consuming enough are the primary barriers to purchase.

32% of consumers do not buy green beans as they don't want to waste any.

1.

Insight:

Overall purchase was lower this month, with consumers less likely to purchase from specialist and independent retailers.

Short Term Recommendation:

Ensure widespread availability across retail outlets, as limited supply could lead to an overall reduction in consumer purchase.

2.

Insight:

This wave sees an increase in fears of wastage and short shelf life inhibiting purchase of beans.

Long Term Recommendation:

Investigate packaging and transport formats of beans across the supply chain. New technologies that can increase freshness and shelf life will add value to consumers.

Carrot Grower Action Plan.

Wave 37 Fast Facts – Carrots

- Importance of carrots was low again this month; however, consumers are satisfied with the range available.
- Carrots are purchased approximately 4 times per month. Consumption of carrot occurs 14 occasions per month, around once every second day.
- On average, consumers purchase 1.1kg of carrot. Recalled last spend was $2.70. Consumers perceived carrots to be very good value for money.
- National price tracking indicated the average price for carrots in June was $1.79 per kg, which was reasonably consistent between state and retailers.
- Awareness of carrot types remains low, with just over two-thirds of consumers unable to recall a type of carrot. Colour is the main trigger for unprompted carrot variety awareness.
- Carrots are expected to remain fresh for over 13 days with these expectations generally being met.
- Health and taste are the key triggers to purchase. The main barrier to future purchase are not wanting to waste any.

2085 Products were launched containing carrot.

1.

Insight:

There has been a decrease in snacking occasions.

Short Term Recommendation:

The growth opportunity in the food industry is snacking, which has seen exponential growth over recent years. Position carrots as the ultimate snack food by educating consumers on the health benefits, value and versatility.

2.

Insight:

Increase in purchase of carrots in the future is lower than the Vegetable Average, indicating that the category is stagnant.

Long Term Recommendation:

Re-engage consumers with carrots by investigating new product development options that are trending overseas, including carrot jam, carrot bread and carrot lemonade juices. Bringing varietals from overseas or growing new varietals domestically may also reinvigorate the category. Ensure new products and varietals highlight flavour profiles and health benefits for increased trial.

Cauliflower Grower Action Plan.

Wave 37 Fast Facts – Cauliflower

- Cauliflower holds low importance to consumers and there is little interest in new varieties. The majority of consumers indicate that their purchase of cauliflower will remain stable in the future.
- Purchase of cauliflower occurs 3 times per month and is consumed 8 times per month. Purchase is typically from mainstream retailers.
- Overall, cauliflower is perceived to be relatively good value for money (6.2/10). Consumers on average purchase 0.9kg, with recalled last spend at $3.50.
- Price tracking for June 2016 revealed an average price of $4.69 each, slightly lower than in February 2016 ($5.03 each).
- Spontaneous recall remains very low for cauliflower, with over two thirds of consumers unable to name a type.
- Health and ease of preparation are the strongest triggers to purchase, while not wanting to waste any and already consuming enough are the two biggest barriers.
- Consumers expect cauliflower to remain fresh for nine days, with expectations of freshness largely met.

13% of consumers used cauliflower when cooking a new recipe.

1.

Insight:

Overall importance of cauliflower is low with consumers. However, they highly value Australian grown.

Short Term Recommendation:

Increase overall importance with consumers by clearly highlighting Australian grown product at point of sale. Country of origin signage largely goes unnoticed in-store; therefore, communication needs to be eye catching and engaging to resonate with consumers.

2.

Insight:

Perceived health benefits and versatility of cauliflower have both increased as a trigger to purchase.

Long Term Recommendation:

To capitalise on these purchase decisions, ensure health and nutritional information is available to consumers when purchasing cauliflower. A information card that contains recipe ideas and cooking techniques will also encourage purchase.

Pumpkin Grower Action Plan.

Wave 37 Fast Facts – Pumpkin

- Consumers are satisfied with the range of pumpkin available, and overall it has high levels of consumer sentiment.
- Purchase and consumption frequency of pumpkin both increased, with approximately 9 consumption occasions per month. Purchase is mainly from mainstream and specialist retailers.
- Consumers on average are purchasing 1.3kg of pumpkin. Recalled last spend is $3.20.
- Price tracking revealed a national average of $3.37 per kg for butternut pumpkins, relatively consistent with the previous wave.
- Awareness of pumpkin remains high, with high recall across multiple types of pumpkin.
- Taste and health are the key influences to purchase. Barriers to purchase include not wanting to waste any and already consuming enough to balance their diet.
- Consumers expect pumpkin to remain fresh for approximately 12 days once purchased. These expectations are being met most of the time.

7.0/10 consumers perceive pumpkin to be good value for money.

1.

Insight:

Purchase of small and large pre-packaged formats are on the rise.

Short Term Recommendation:

As health continues to be a driver of purchase, use this information to engage consumers in future purchase. The packaging on pre-prepared formats is the ideal platform to educate consumers on the health benefits of pumpkin, as well as providing quick and easy recipe ideas that will appeal to time conscious consumers.

2.

Insight:

An increasing number of consumers indicate they do not know how to fit any more pumpkin into their diet.

Long Term Recommendation:

Position pumpkin as the versatile vegetable that can be used in a variety of dishes and replacements for current staples, such as potatoes. Promote cooking ideas such as pumpkin mash, roast pumpkin, pumpkin soup etc. Warm dishes will appeal during the winter months.

Baby Broccoli Grower Action Plan.

Wave 37 Fast Facts – Baby Broccoli

- There is a high level of endorsement for baby broccoli, with consumers likely to recommend to family and friends. Consumers are also satisfied with the range of baby broccoli available.
- Purchase of baby broccoli occurs around 3 times per month and it is consumed 6 times per month. Purchase is typically from mainstream retailers.
- Consumers on average purchase 0.5kg, typically bunched. Recalled last spend is $3.30.
- Price tracking revealed an average price of $2.55 per bunch, slightly higher than the previous wave.
- Ease of preparation, health and taste remain the strongest triggers to purchase, already consuming enough and price are the two biggest barriers.
- Consumers' expectations of freshness are largely met, consistent with the previous wave.

51% of consumers purchase baby broccoli as it cooks quickly.

1.

Insight:

Less than half of fresh vegetable consumers are purchasing baby broccoli, and those that are, are using them in the same recipes each meal.

Short Term Recommendation:

To encourage greater trial and purchase of baby broccoli provide alternating recipe cards at point of sale or on packaging tags. This will create engagement with consumers, and will appeal to Eager Explorers who are open to try new vegetables as well as recipes.

2.

Insight:

Expense is a key barrier to purchase baby broccoli.

Long Term Recommendation:

Position baby broccoli as a premium vegetable by highlighting Australian provenance and flavour profile (delicate in comparison to regular broccoli). This will increase the value proposition for consumers and position the vegetable outside of quick meal occasions, into weekend and entertaining.

Silverbeet Grower Action Plan.

Wave 37 Fast Facts – Silverbeet

- Consumers are satisfied with silverbeet, sitting just above the Vegetable Average. One fifth of consumers indicated that they will purchase more in the future.
- Purchase of silverbeet occurs around 3 times per month and is consumed 6 times per month. Purchase is typically from mainstream retailers and also specialist retailers.
- Consumers on average are purchasing 0.9kg of silverbeet. Recalled last spend is $3.30, relatively consistent with the previous wave.
- Price tracking for June 2016 showed the national average as $3.70 per bunch for silverbeet, a decline since February 2016.
- Spontaneous awareness for silverbeet is low, with the highest recall for rainbow/coloured/Swiss silverbeet.
- Health, ease and adding variety are the key influences to purchase. Barriers to purchase include already consuming enough for their needs and wanting variety in their diet.
- Consumers expect silverbeet to remain fresh for six days once purchased, and these expectations are generally met.

6.8/10 consumers rate silverbeet as good value for money.

1.

Insight:

Awareness of silverbeet varieties is very low.

Short Term Recommendation:

Increase perceived value in silverbeet by differentiating varieties for consumers. Ensure varietal names are used, as well as calling out differentiating factors, including suitability to cooking, flavour and texture profile.

2.

Insight:

Whilst freshness expectations have increased this month, one in ten consumers are discouraged from purchasing silverbeet because of poor quality.

Long Term Recommendation:

A negative experience with fresh produce can turn away consumers for weeks. Investigate quality across the supply chain to pin-point cause or source of variability.

Parsley Grower Action Plan.

Wave 37 Fast Facts – Parsley

- Parsley has strong levels of consumer sentiment across all metrics of importance, satisfaction, endorsement and interest in new varieties, consistent with the previous wave.
- Purchase of parsley occurs approximately 4 times per month, and it is consumed 11 times per month. Purchase is typically from mainstream retailers.
- Consumers on average purchase 0.3kg, (typically, one bunch). Recalled last spend is $2.90.
- Price tracking revealed an average price of $2.74 per bunch in June 2016, consistent with previous waves.
- Over two thirds of consumers are able to recall a type of parsley, with highest recall for Flat Leaf/Italian/Continental and Curly Leaf Parsley.
- Use as an ingredient in dishes and complementing other food are the strongest triggers to purchase, while not wanting to waste any and growing their own are the two biggest barriers.
- Consumers expect parsley to remain fresh for just over a week. Expectations of freshness are met most of the time.

56% of consumers use parsley in soups.

1.

Insight:

Ease of preparation is a key reason to purchase parsley.

Short Term Recommendation:

Highlight the versatility of parsley and its ability to enhance the flavour of any dish by providing recipe ideas at point of sale. Further detail the health benefits in which parsley will provide for the consumer including a rich source of vital vitamins including C, B12, K and A.

2.

Insight:

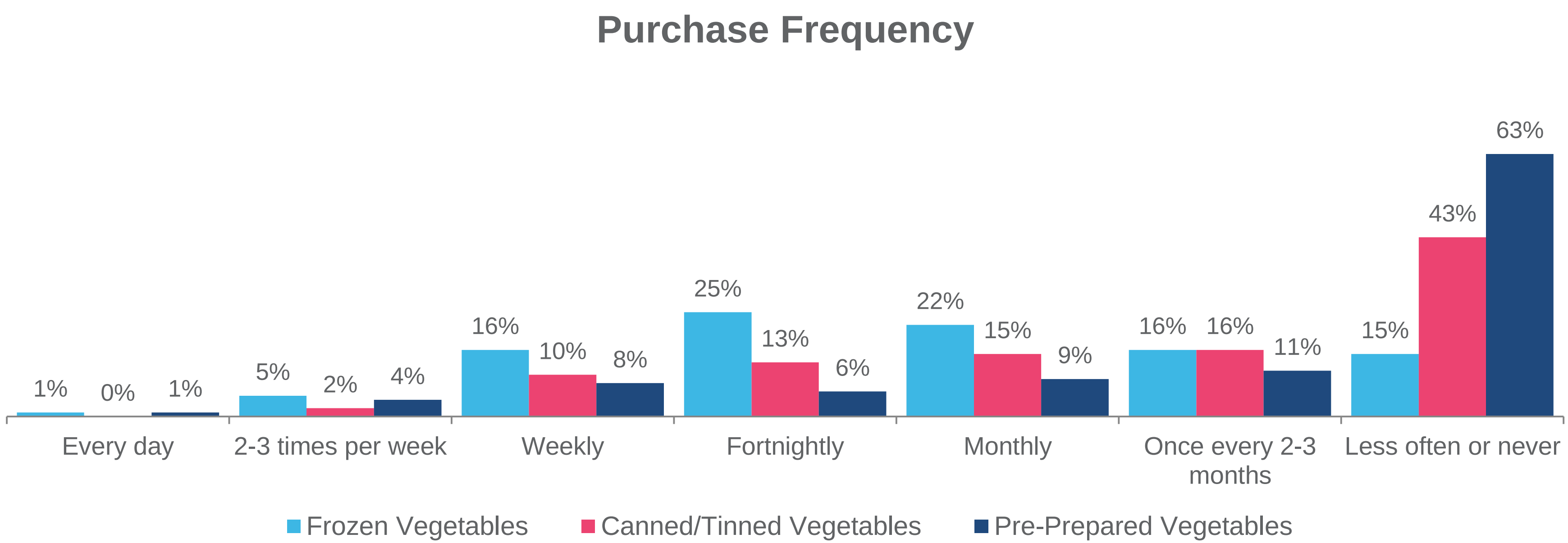
Parsley is seen as a staple, purchased frequently and used in new recipes.

Long Term Recommendation:

There is potential to develop ready to go staples packs that contain parsley, onion and garlic. They could be positioned as meals starter packs, which would appeal to time conscious consumers and Wholesome Habits, who prefer to cook with familiar vegetables and flavours.

Wave 37:
Response to Ad hoc Questions

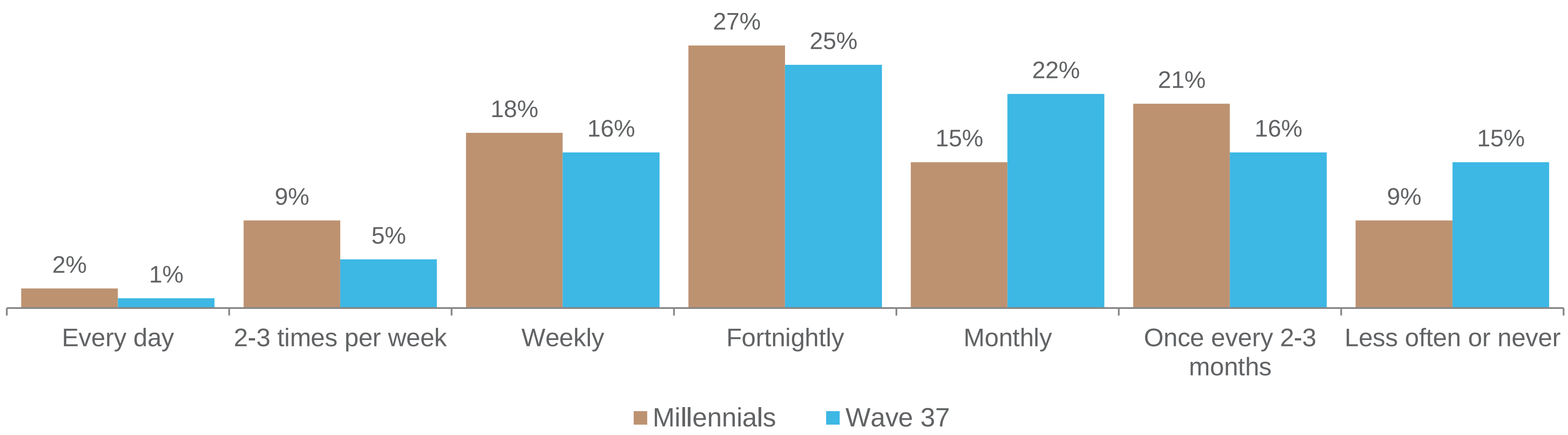
The majority of consumers purchase frozen and canned/tinned vegetables at least monthly. In contrast, almost two thirds of consumers infrequently or never purchase pre-prepared vegetables.



AHW37Q1. How often do you buy frozen/canned/pre-prepared vegetables? (n=609)

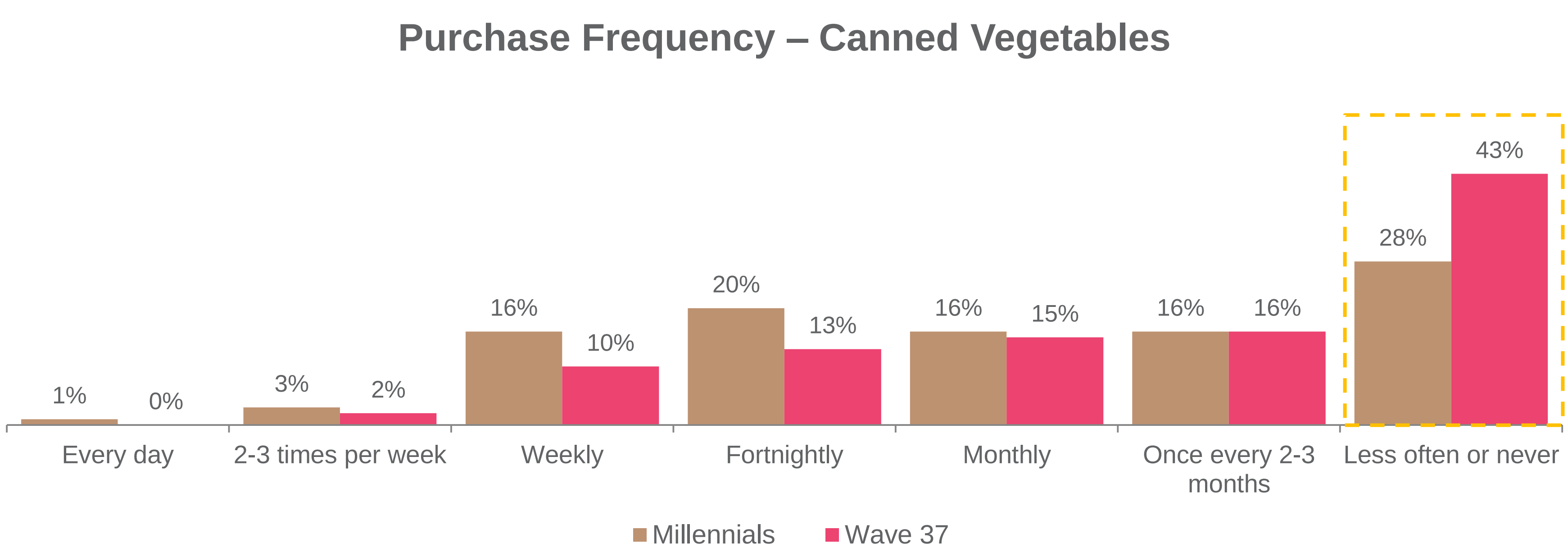
Frozen vegetables are generally purchased at least monthly by both Millennials and the Average Australian consumer.

Purchase Frequency – Frozen Vegetables



AHW37Q1. How often do you buy frozen/canned/pre-prepared vegetables? (n=609)

Almost half of Average Australian consumers do not purchase tinned vegetables, whereas Millennials are more likely to buy this type of format.

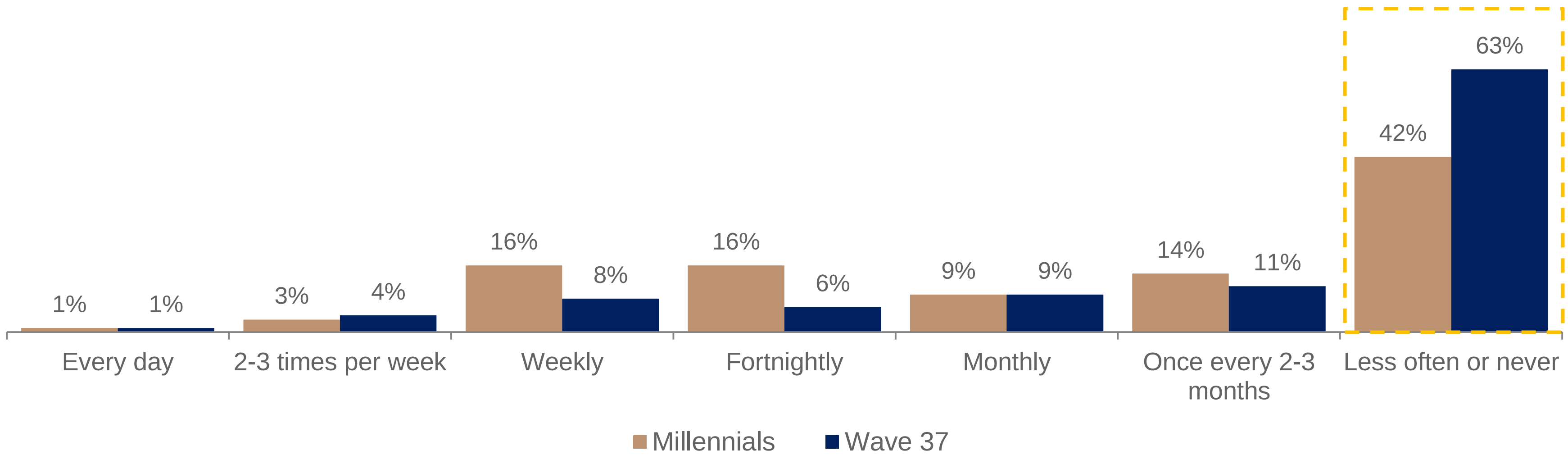


colmar brunton.

AHW37Q1. How often do you buy frozen/canned/pre-prepared vegetables? (n=609)

Almost two thirds of Average Australian consumers do not purchase pre-prepared vegetables, whereas Millennials are more likely to buy this format typically on a weekly or fortnightly basis.

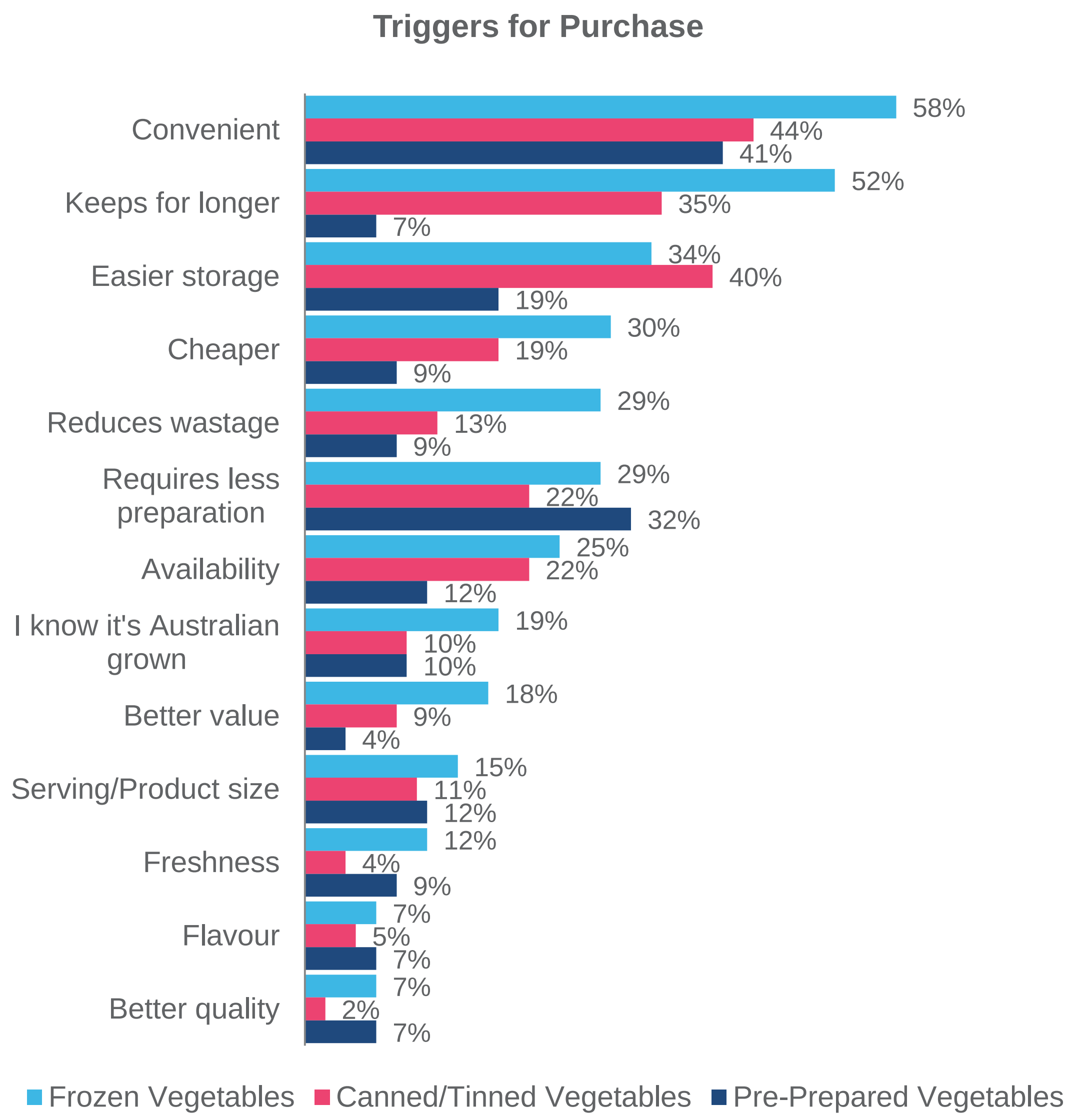
Purchase Frequency – Pre-Prepared Vegetables



AHW37Q1. How often do you buy frozen/canned/pre-prepared vegetables? (n=609)

The key reasons for purchase of frozen and tinned vegetables include convenience, the ability to keep these formats on hand for longer than fresh varieties and ease of storage.

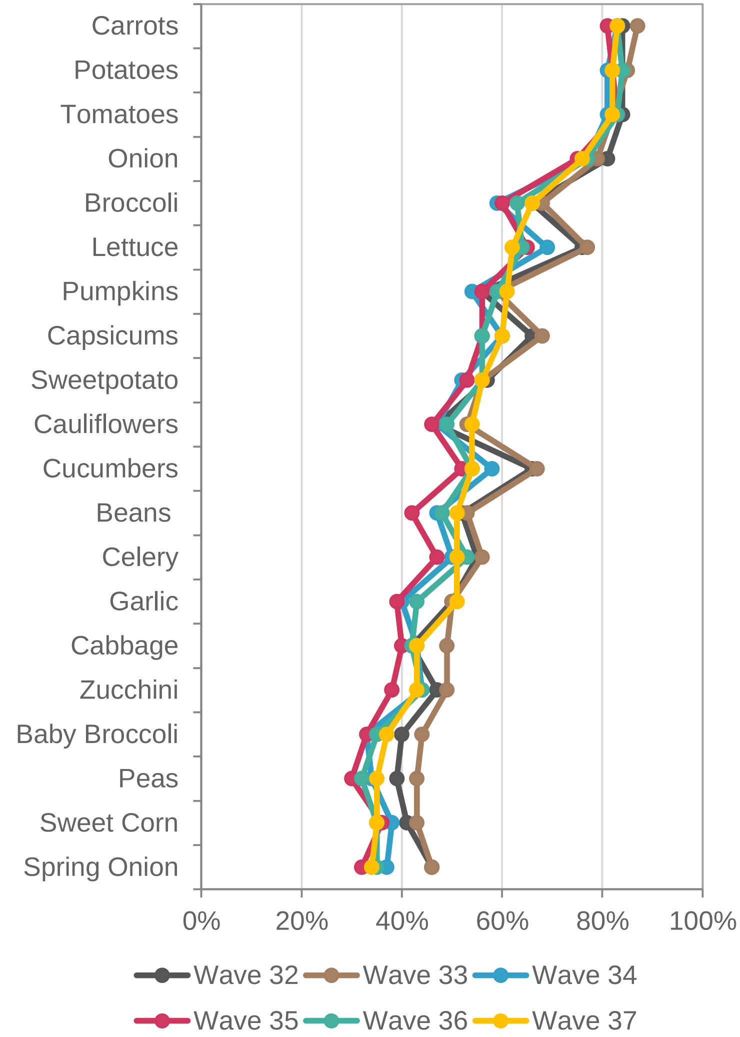
By contrast, purchase of pre-prepared vegetables is primarily convenience driven as it requires less preparation.



Wave 37: Overall Vegetable Tracking

The top three vegetables purchased last month were carrots, potatoes and tomatoes, consistent with the previous wave.

This month sees the greatest increase in purchase of garlic and cauliflower.



Sample Wave 37 N= 880
S8. Which of the following fresh vegetables have you purchased in the last month?

Category Health Explained

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

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

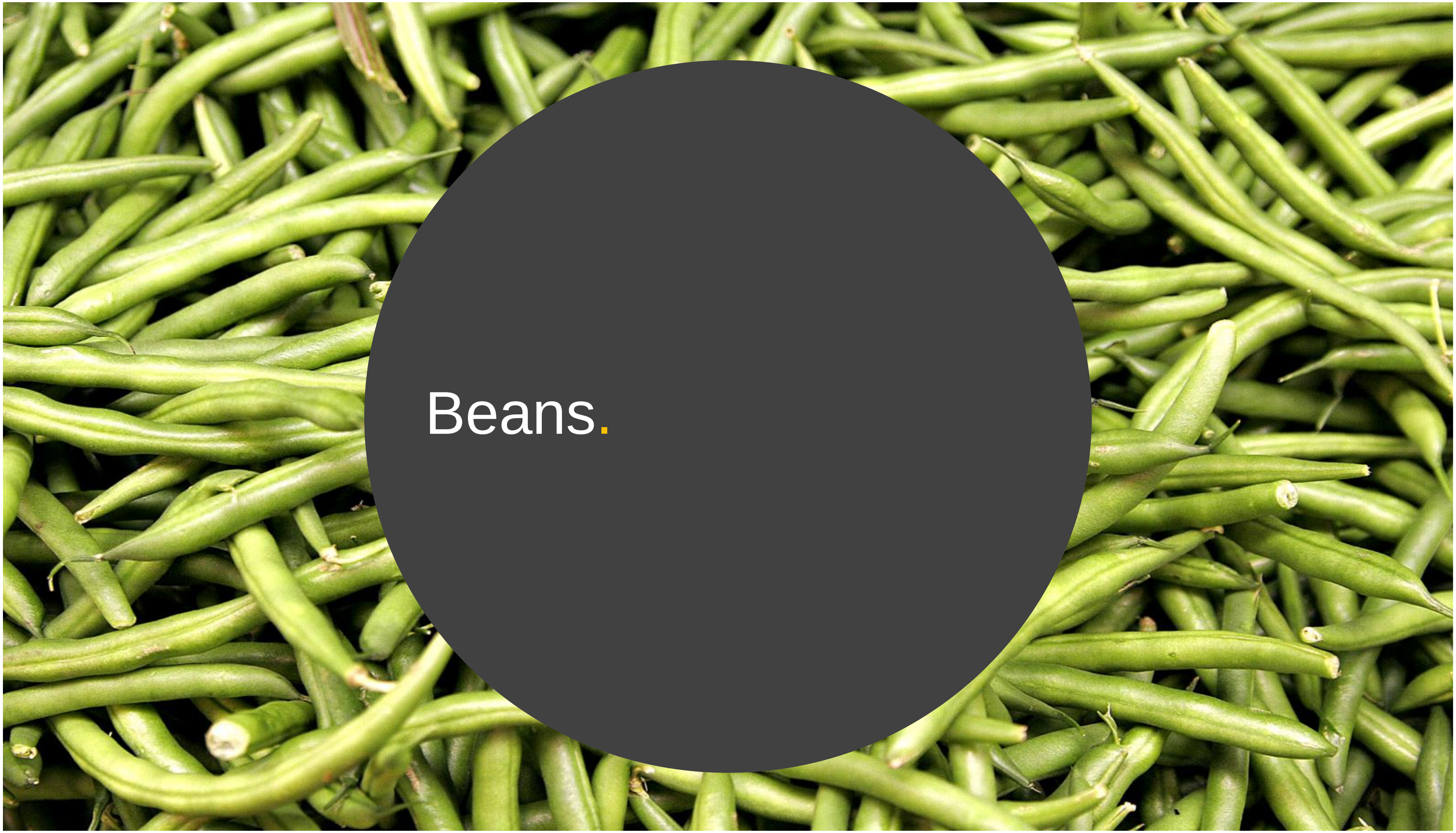
- How **important** to you is having a range of *commodity* available in the store where you usually shop?
- How **satisfied** or dissatisfied are you with the range of *commodity* currently available?
- How likely would you be to **recommend** *commodity* to your family and friends?
- How interested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

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

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

	Beans	Carrots	Cauliflower	Pumpkin	Baby Broccoli	Silverbeet	Parsley	Vegetable Average
Importance	6.6	5.7	5.3	6.8	6.8	6.2	7.1	6.4
Satisfaction	6.6	7.0	6.8	7.4	7.0	6.8	7.4	6.7
Endorsement	7.3	7.2	7.0	7.3	7.2	7.2	7.3	7.0
Interest (New Types)	6.3	5.7	5.7	6.3	6.6	6.5	6.8	6.3
Future Purchase								
More	15%	9%	15%	17%	16%	20%	15%	16%
Same	84%	91%	83%	82%	83%	79%	82%	83%
Less	1%	0%	2%	1%	0%	1%	4%	1%

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



Beans.

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

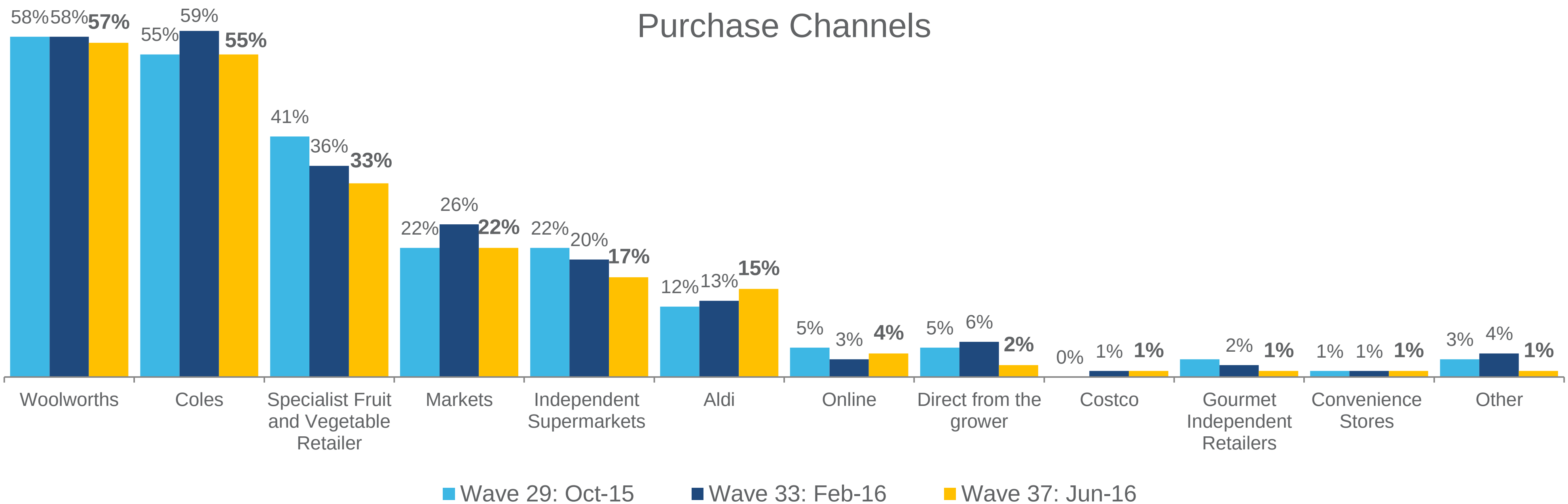
Beans are generally bought through mainstream retailers, with decreasing purchase from specialist vegetable retailers and independent supermarkets.

Average Purchase **3.6** times per month

▲ 3.8 times, Wave 29
▲ 4.0 times, Wave 33

Average Consumption **8.5** times per month

▲ 8.8 times, Wave 29
▲ 9.1 times, Wave 33



Q1. On average, how often do you purchase French and runner beans?
Q2. On average, how often do you consume French and runner beans?
Q5. From which of the following channels do you typically purchase French and runner beans?
Sample Wave 29 N=302, Wave 33 N=301, Wave 37 N=306

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

Average Spend and Price Sensitivity

Average weight of purchase

The typical consumer purchases **590g** of beans, relatively consistent with past waves.

▲ 610g, Wave 29
▲ 610g, Wave 33

Recalled last spend

Recalled last spend on bean purchase was **$3.40**, which has returned back to the price in Wave 29.

— $3.40, Wave 29
▼ $3.10, Wave 33

Value for money

Consumers perceive beans as good value for money **(6.4/10)**, relatively consistent with the previous waves.

— 6.4/10, Wave 29
▼ 6.3/10, Wave 33

Q3. How much French and runner beans do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is?
Sample Wave 29 N=302, Wave 33 N=301, Wave 37 N=306

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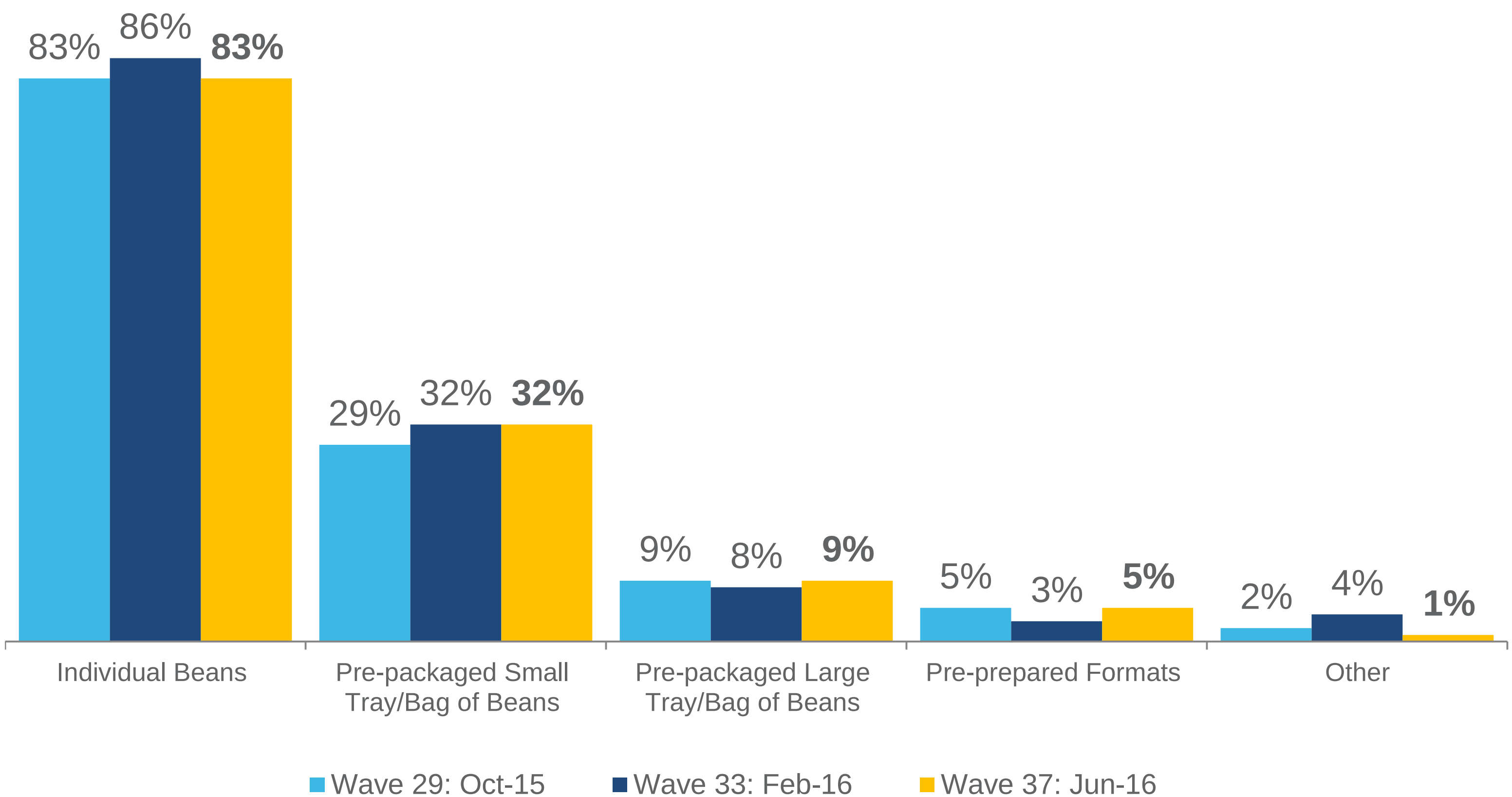
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

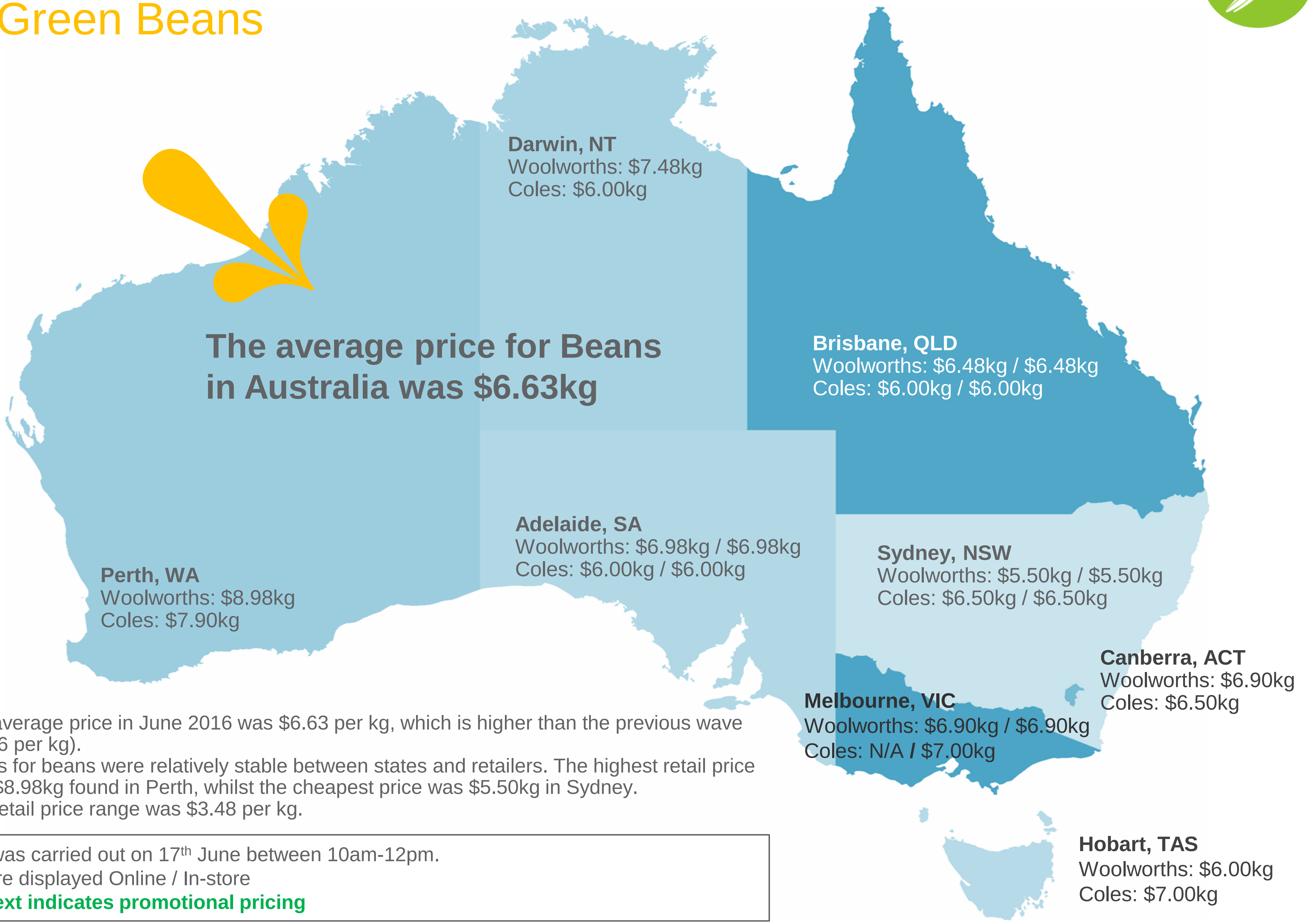
Loose beans remain the most common format purchased, which is consistent with all previous waves.



Q4b. In what fresh formats do you typically purchase Beans?
Sample Wave 29 N=302, Wave 33 N=301, Wave 37 N=306

Online and In-store Commodity Prices

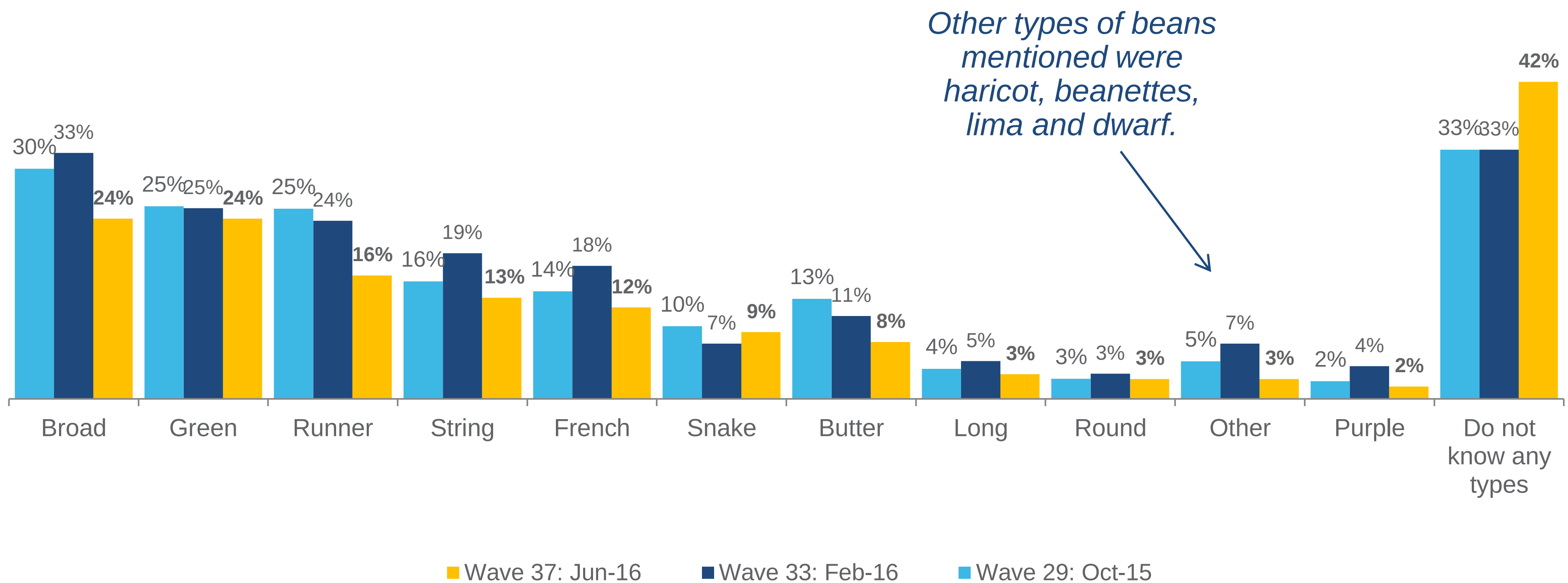
Green Beans



- The average price in June 2016 was $6.63 per kg, which is higher than the previous wave ($5.66 per kg).
- Prices for beans were relatively stable between states and retailers. The highest retail price was $8.98kg found in Perth, whilst the cheapest price was $5.50kg in Sydney.
- The retail price range was $3.48 per kg.

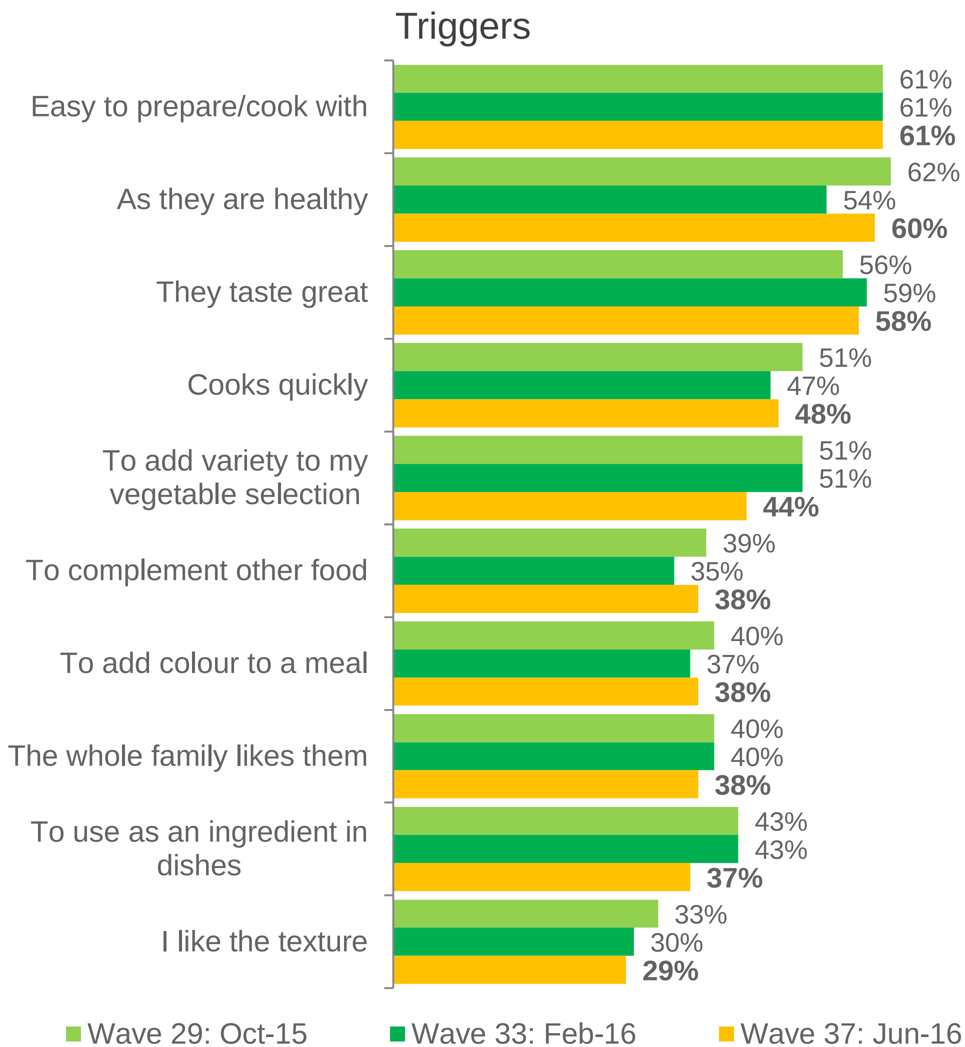
Pricing was carried out on 17th June between 10am-12pm.
Prices are displayed Online / In-store
Green text indicates promotional pricing

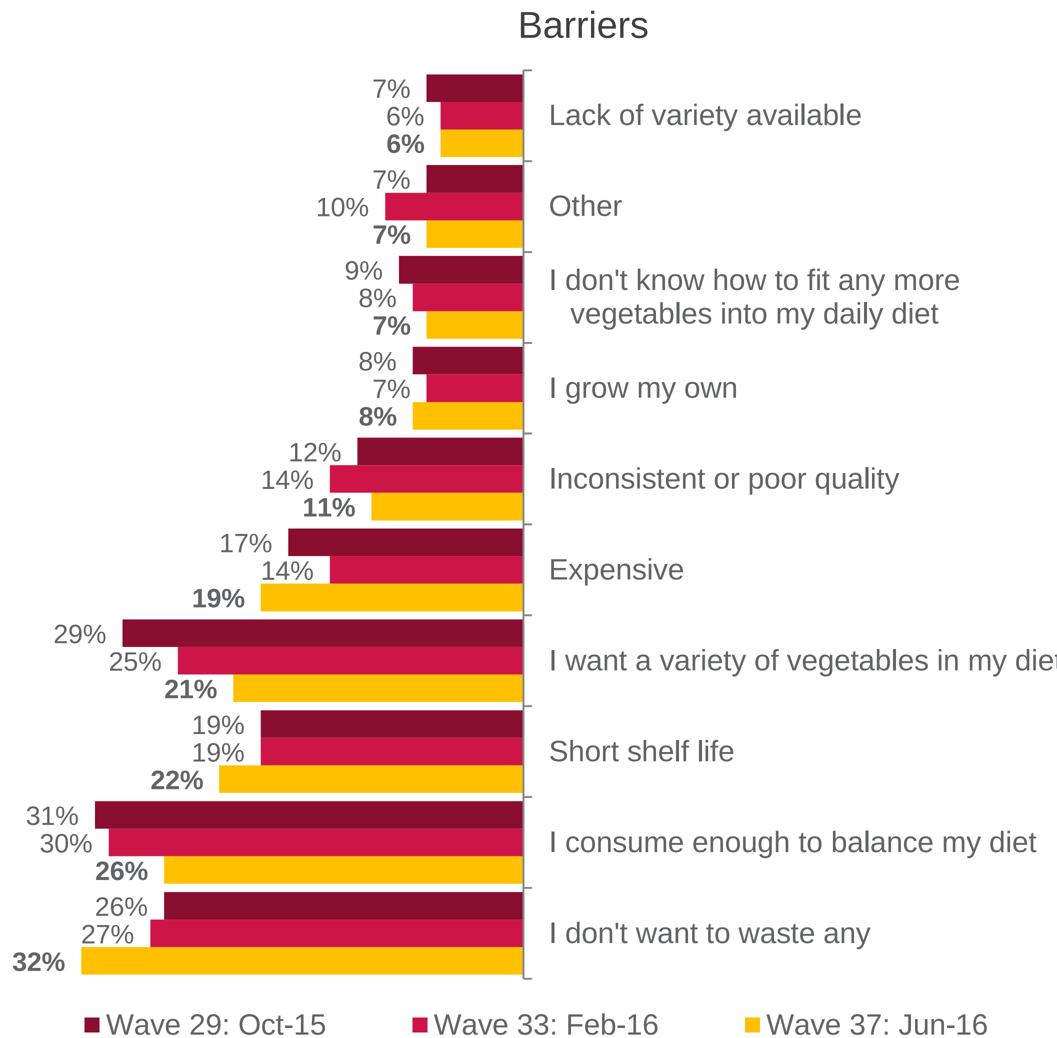
This wave saw a noticeable increase in consumers who were unable to recall a type of green bean. Broad, green and runner varieties had the greatest level of recall this wave.



Q6a. What varieties/types of French and runner beans are you aware of? (unprompted)
Sample Wave 29 N=302, Wave 33 N=301, Wave 37 N=306

Ease of preparation and health are the primary motivations to purchasing beans. The main barriers to purchase are not wanting to waste any and already consuming enough for their needs. Wanting a variety of vegetables is continually declining as a barrier preventing future purchase.





Q7. Which of the following reasons best describes why you purchase French and runner beans?
Q8. Which reason best describes why you don't buy French and runner beans more often?
Sample Wave 29 N=302, Wave 33 N=301, Wave 37 N=306

Australian and Chinese remain the most popular forms of cuisine when cooking with beans.

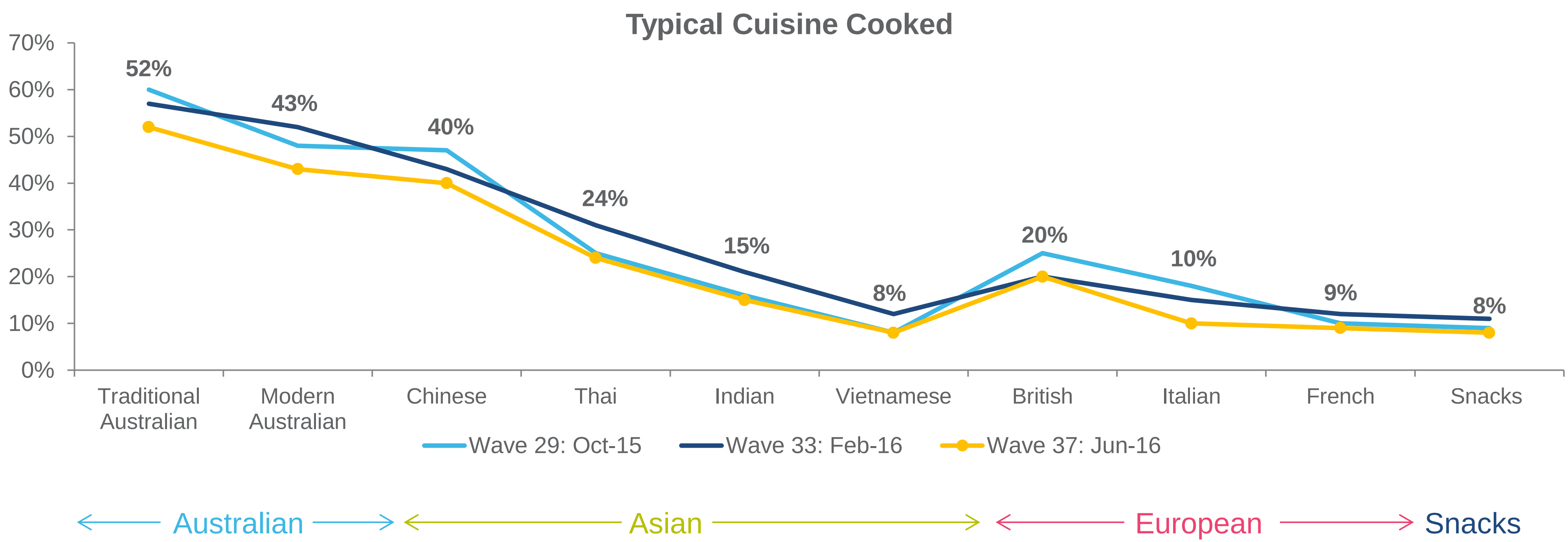
Consumption of green beans remains centred around dinner occasions.

Top 5 Consumption Occasions

	Wave 33	Wave 37
Dinner	74%	**77%**
Family meals	69%	**58%**
Weekday meals	55%	**46%**
Quick Meals	48%	**41%**
Weekend meals	43%	**39%**

13% used green beans when cooking a new recipe

▲ 22%, Wave 33



Q10. What cuisines do you cook/consume that use French and runner beans?
Q11. Which of the following occasions do you typically consume/use French and runner beans?
Sample Wave 29 N=302, Wave 33 N=301, Wave 37 N=306

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

Consumers are more likely to serve beans with carrots and potatoes. Stir-frying and steaming remain the key cooking styles.

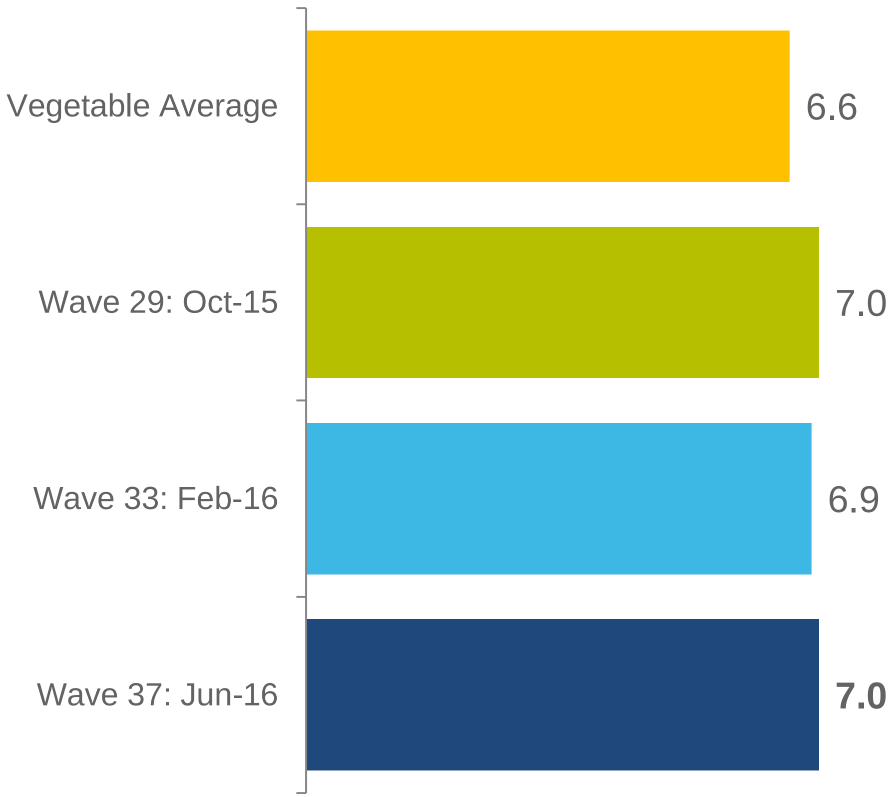
Accompanying Vegetables

Carrot	66%
Potato	55%
Broccoli	39%
Sweet Potato	28%
Onion	28%

Top 10 Cooking Styles			
	Wave 29	Wave 33	Wave 37
Stir frying	55%	50%	**54%**
Steaming	58%	62%	**54%**
Boiling	50%	44%	**42%**
Microwave	22%	23%	**19%**
Raw	22%	20%	**18%**
Soup	19%	16%	**15%**
Sautéing	19%	17%	**14%**
Frying	14%	13%	**12%**
Slow Cooking	17%	13%	**12%**
Roasting	8%	4%	**5%**

Q9. How do you typically cook French and runner beans?
Q10a. And when are you serving French and runner beans which of the following do you also serve together with this?
Sample Wave 29 N=302, Wave 33 N=301, Wave 37 N=306

The importance of provenance for beans has remained relatively consistent over the last three waves. Knowing that beans are grown in Australia remains the most important information to consumers.

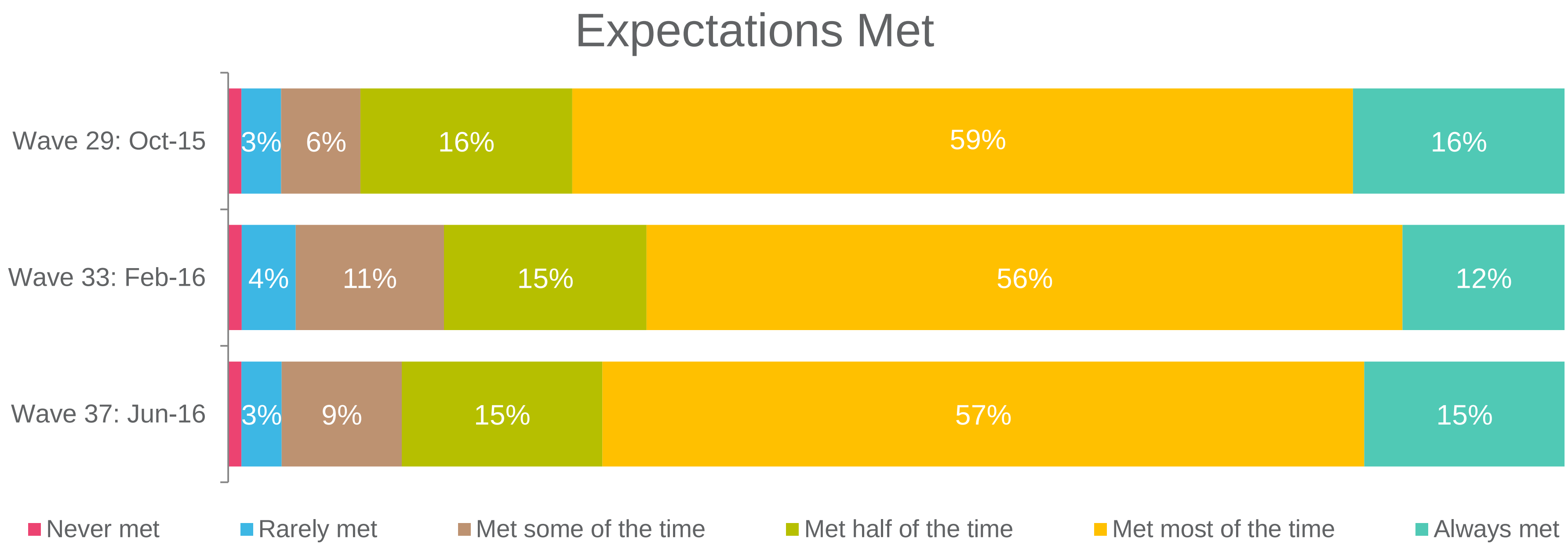


Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 29 N=302, Wave 33 N=301, Wave 37 N=306

Beans are expected to stay fresh for one week once purchased, which is relatively consistent with the previous waves. These expectations of freshness are being met most of the time.

Expected To stay fresh for **7.7** days

▼ 7.5 days, Wave 29
▼ 7.4 days, Wave 33



Q12. How long do you expect French and runner beans to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy French and runner beans?
Sample Wave 29 N=302, Wave 33 N=301, Wave 37 N=306

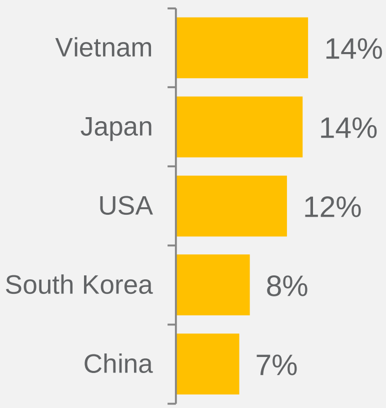
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Bean Product Launch Trends.

Bean Global NPDs
March – June 2016

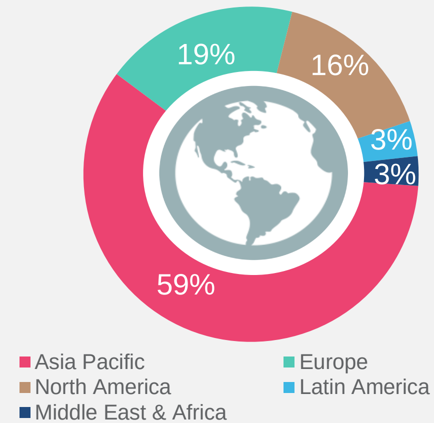
176 products containing green beans were launched globally in the last three months. Asia Pacific was the key region for launches. Meals and meal centers and snacks were top categories with preservative free and microwaveable claims most commonly used.

Country

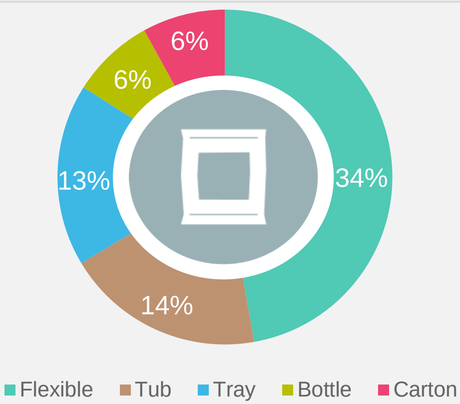


176 Global NPDs

Region



Top Pack Formats



Categories

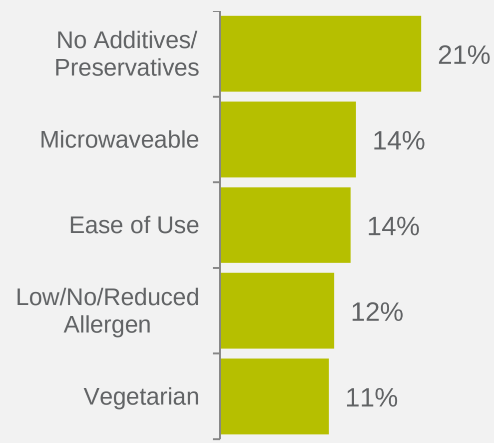
Meals 19%

Snacks 17%

Bakery 15%

Desserts 12 %

Top Claims



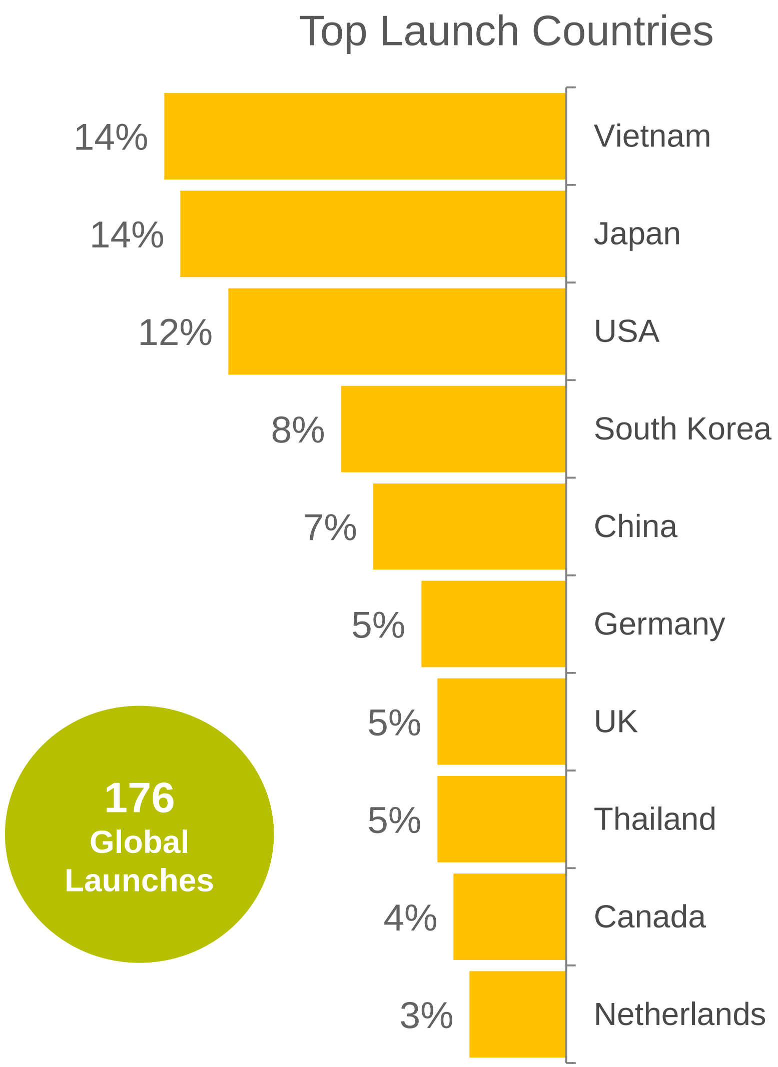
Bean Product Launches:
Last 3 Months (March – June 2016)
Summary

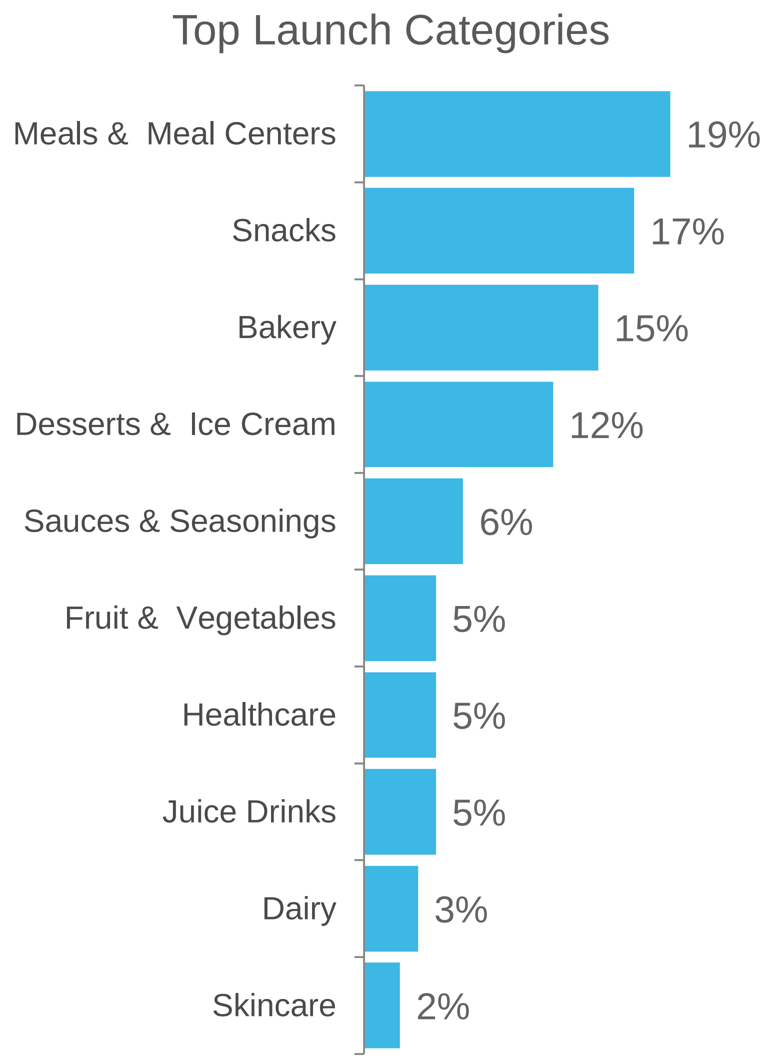
- A total of 176 products containing French and Runner beans as an ingredient were launched globally in the last 3 months, which is lower than the previous wave.
- There were no products launched in Australia in the past three months.
- Asia Pacific (59%) continued to be the top region for product launches.
- Flexible (34%), tub (14%) and tray (13%) packaging formats are consistently used for bean products launched.
- The top categories for product launches were meals (19%), snacks (17%) and baked goods (15%).
- The core claims used for these launches globally were no additives/preservatives (21%), microwaveable (14%), and ease of use (14%).
- The most innovative launch was the green bean ice cream from Vietnam. Examples of innovative green bean products can be found on the following slides.

Source: Mintel (2016)

Bean Launches
Country & Categories

- Vietnam was the key country for green bean product launches, followed by Japan and USA.
- Meals, snacks and bakery products were the top categories for launches.





Bean Launches
Top Claims & Pack Formats Used

- No Additives/Preservatives was the most prominent claim in Wave 37. Microwaveable and ease of use and were also commonly used.
- Globally the top pack formats used for product launches were flexible packaging and tubs.

Pack Formats Used

Global	Flexible	34%
	Tub	14%
	Tray	13%
Asia Pacific	Flexible	44%
	Tub	13%
	Carton	7%
Europe	Tub	24%
	Tray	21%
	Jar	12%

Top Claims Used

Global	No Additives/Preservatives	21%
	Microwaveable	14%
	Ease of Use	14%
Asia Pacific	No Additives/Preservatives	20%
	Ease of Use	13%
	Time/Speed	10%
Europe	Microwaveable	33%
	Low/No/Reduced Allergen	30%
	Vegetarian	27%

Innovative Bean Launches:
L3M (March – June 2016)

Merino Green Bean Ice Cream (Vietnam)

Merino Kem Dau Xanh (Green Bean Ice Cream) has been repackaged. The product retails in a newly designed 500ml pack.

Claims:
N/A

Tesco Finest Aromatic Edamame and Pea Salad (UK)

Tesco Finest Aromatic Edamame and Pea Salad contains fresh coriander, edamame soya beans, broad beans, peas, lemongrass, chilli and ginger dressing that is ready to drizzle. The vegetarian certified product retails in a 200g pack.

Claims:
Vegetarian, Premium, Ease of Use

Devour Pulled Chicken Burrito Bowl (USA)

Devour Pulled Chicken Burrito Bowl is now available. The product is made with premium pulled white chicken meat, black beans and a vegetable blend topped with creamy chili sauce, and Monterey jack and cheddar cheeses. USDA certified microwavable product is described as a delicious burrito filling without the tortilla and retails in a 12-oz. pack.

Claims:
Microwaveable, Premium

Shang-ha Minced Pork and Green Beans Congee (Vietnam)

Shang-ha Chao Dau Xanh Thit Bam (Minced Pork and Green Beans Congee) has been repackaged. The natural product is enriched with iodine and is said to be good for health. It is free from preservatives and retails in a 50g pack.

Claims:
No Additives/Preservatives, Vitamin/Mineral Fortified

Source: Mintel (2016)

Innovative Bean Launches:
L3M (March – June 2016)

Merino X Cereal and Green Bean Ice Cream (Vietnam)

Merino X Kem Dau Xanh Yen Mach (Cereal and Green Bean Ice Cream) has been repackaged in a newly designed 60g pack featuring summer 2016, The Secret Life of Pets characters, and opportunities to win valuable prizes from the manufacturer. It is ready to eat.

Claims:
Children (5-12), Seasonal, Ease of Use, Event Merchandising

AH Foe Yong Hai with Fried Noodles (Netherlands)

AH Foe Yong Hai met Bami (Foe Yong Hai with Fried Noodles) has been relaunched with a new formulation and retails in a newly designed 500g pack. This microwaveable meal comprises an omelette in a sweet sour sauce with fried noodles and vegetables.

Claims:
Microwaveable

Rang Mahal Chicken Tikka Samosa (Thailand)

Rang Mahal Kari Puff Sai Gai Yang (Chicken Tikka Samosa) is described as chicken cooked with mix of Indian spices encased in pastry triangles. It can be deep fried for three to four minutes or baked for 14-16 minutes. This halal and HACCP certified product retails in a 1kg pack bearing a QR code and the Facebook link.

Claims:
Halal, Social Media

Phuc An Bakery Vegetarian Pia Cake (Vietnam)

Phuc An Bakery Banh Pia Chay (Vegetarian Pia Cake) has been repackaged in a newly designed 250g pack. The halal certified product is made with durian and green bean using the hygienic and modern technology to maintain its original flavour. It is said to be good for health, and is ready to eat.

Claims:
Vegetarian, Halal, Ease of Use

Source: Mintel (2016)

Innovative Bean Launches:
L3M (March – June 2016)

Woolworths Food Fresh Roasted Pumpkin & Chorizo (South Africa)

Woolworths Food Fresh Roasted Pumpkin & Chorizo is layered on a bed of grains with fresh greens and includes a spicy harissa dressing. The microwaveable medium hot product retails in a partially recyclable 280g pack with the harissa dressing in a separate sachet.

Claims:
Microwaveable, Ethical - Environmentally Friendly Package

ICA Gott Liv Organic Bean Pasta Fettuccine of Edamame Beans (Sweden)

ICA Gott Liv Ekologisk Bönpasta Fettuccine av Edamame Bönor (Organic Bean Pasta Fettuccine of Edamame Beans) is said to be rich in fiber and protein, and is described as easy and tasty. The gluten free pasta has a cooking time of 7-8 minutes, and it retails in a 200g pack featuring the EU Green Leaf and Green Keyhole logos.

Claims:
High/Added Fiber, Organic, Gluten-Free, Low/No/Reduced Allergen, Ease of Use

Organics Happy Baby Starting Solids Green Beans (USA)

Organics Happy Baby Starting Solids Green Beans have been relaunched with a new brand name, previously known as Happy Baby, and retails in a newly designed 3.5-oz. pack. The USDA organic certified product is free of GMOs and is a stage one food suitable for babies from four months of age.

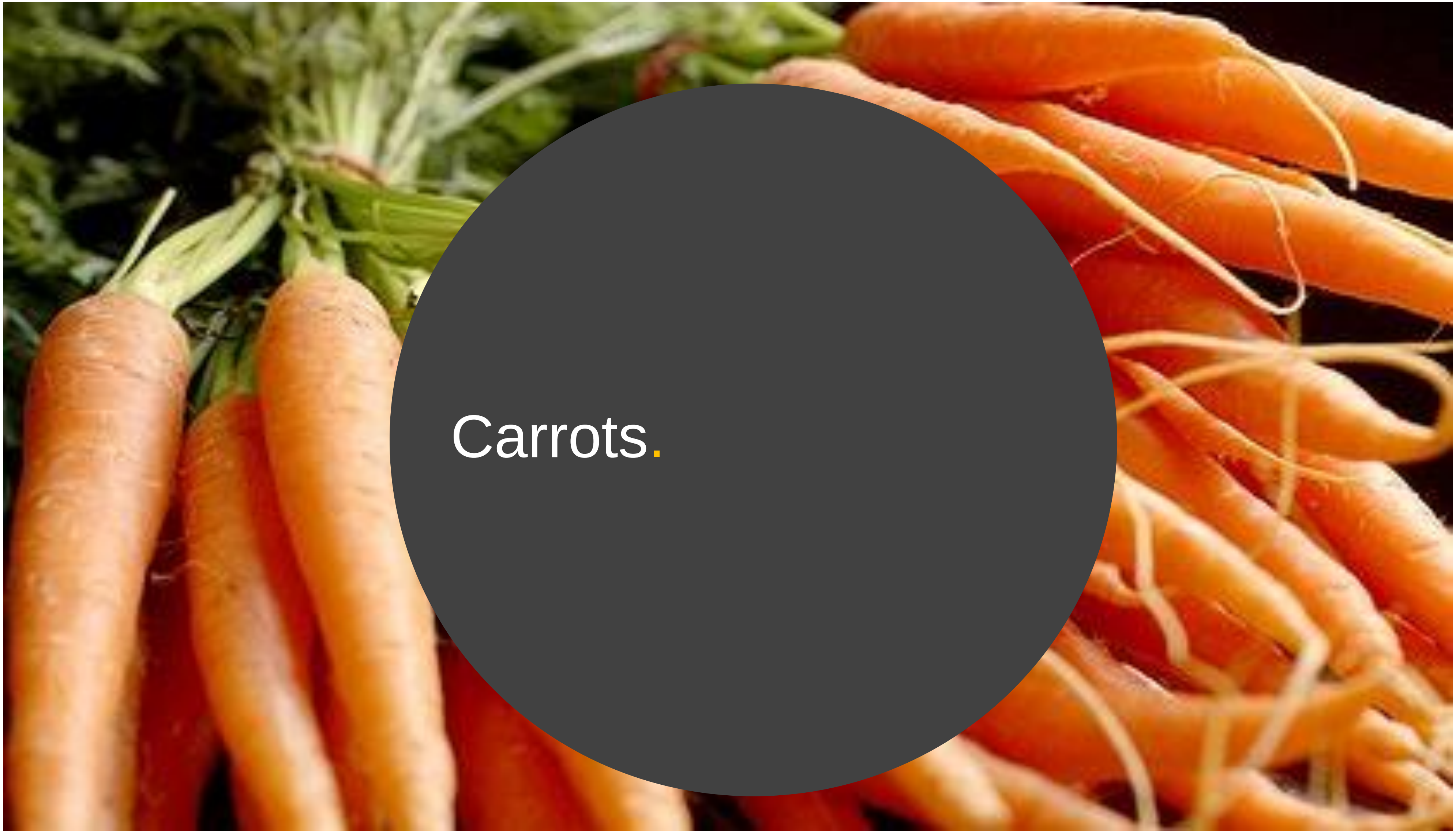
Claims:
Organic, Babies & Toddlers (0-4), GMO-Free

CP Sweet Treat Sweet Boiled Bean Topped with Coconut Cream (Thailand)

CP Sweet Treat Sweet Boiled Bean Topped with Coconut Cream has been repackaged. This halal certified product is made with real coconut milk and coconut sugar, and retails in a 600g pack containing 4 x 150g units.

Claims:
Halal

Source: Mintel (2016)



Carrots.

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

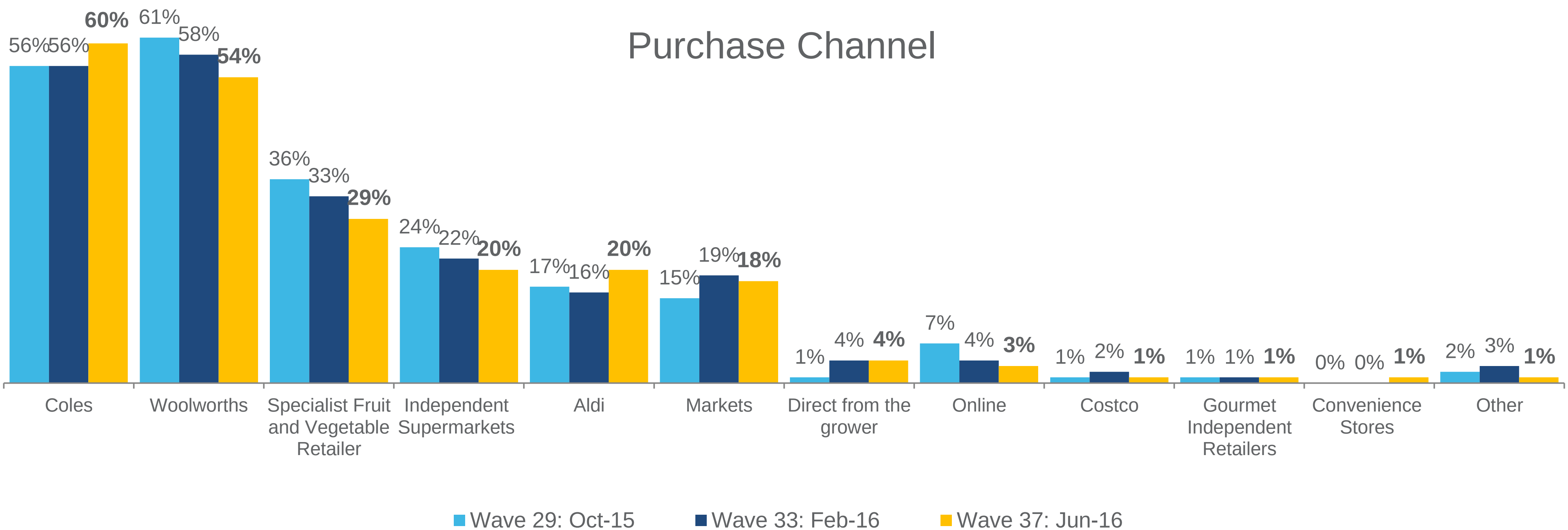
Mainstream retailers remain the key purchase channel. This wave sees a continuing decline in purchase from Woolworths, specialist vegetable retailers and independent supermarkets.

Average Purchase **3.7** times per month

▲ 3.9 times, Wave 29
▲ 4.0 times, Wave 33

Average Consumption **14.4** times per month

▲ 15.2 times, Wave 29
▲ 14.7 times, Wave 33



Q1. On average, how often do you purchase carrot?
Q2. On average, how often do you consume carrot?
Q5. From which of the following channels do you typically purchase carrot?
Sample Wave 29 N=302, Wave 33 N=302, Wave 37 N=306

Horticulture Innovation Australia

colmar brunton.

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

Average Spend and Price Sensitivity

Average weight of purchase

The typical consumer purchases **1.1kg** of carrots, which is consistent with the previous wave.

▲ 1.2kg, Wave 29
— 1.1kg, Wave 33

Recalled last spend

Recalled last spend on carrots was **$2.70**, which has increased since the last wave.

▼ $2.30, Wave 29
▼ $2.30, Wave 33

Value for money

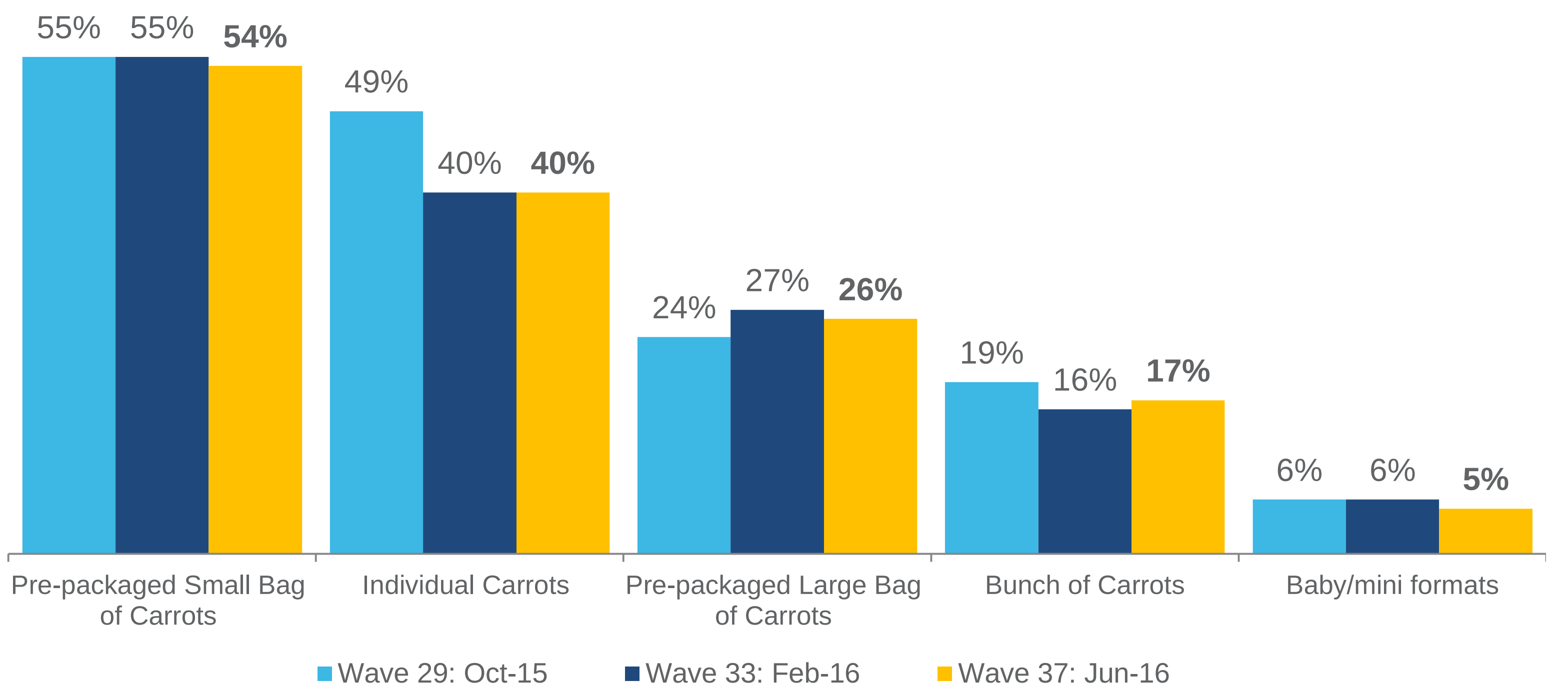
Carrots are perceived to be very good value for money **(7.6/10),** relatively consistent with past waves.

— 7.6/10, Wave 29
▼ 7.5/10, Wave 33

Q3. How much carrot do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? 0-10 scale
Sample Wave 29 N=302, Wave 33 N=302, Wave 37 N=306

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

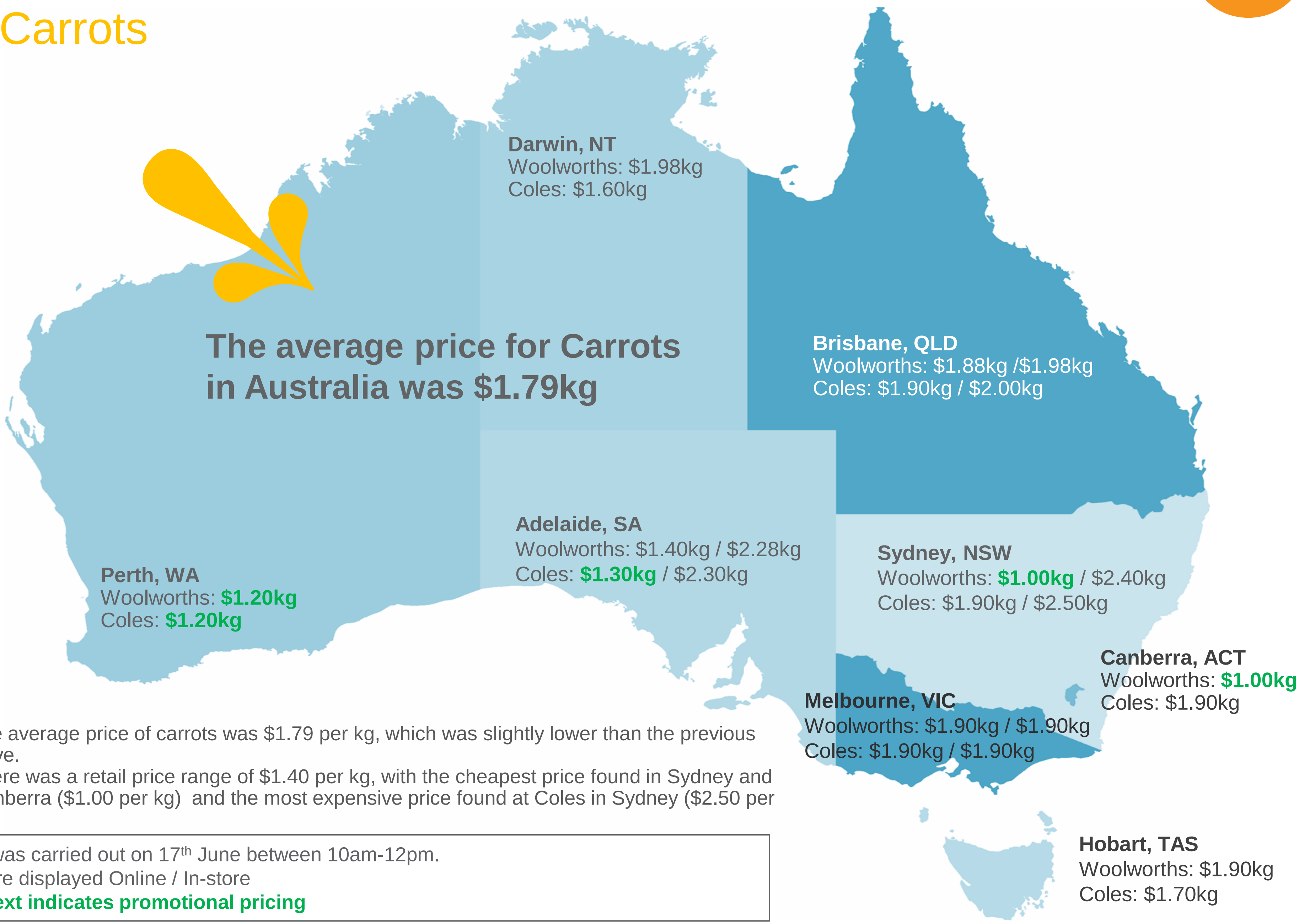
Small bags of carrots remain the primary format purchased, with the types of formats purchased consistent with previous waves.



Q4b. In what fresh formats do you typically purchase Carrots?
Sample Wave 29 N=302, Wave 33 N=302, Wave 37 N=306

Online and In-store Commodity Prices

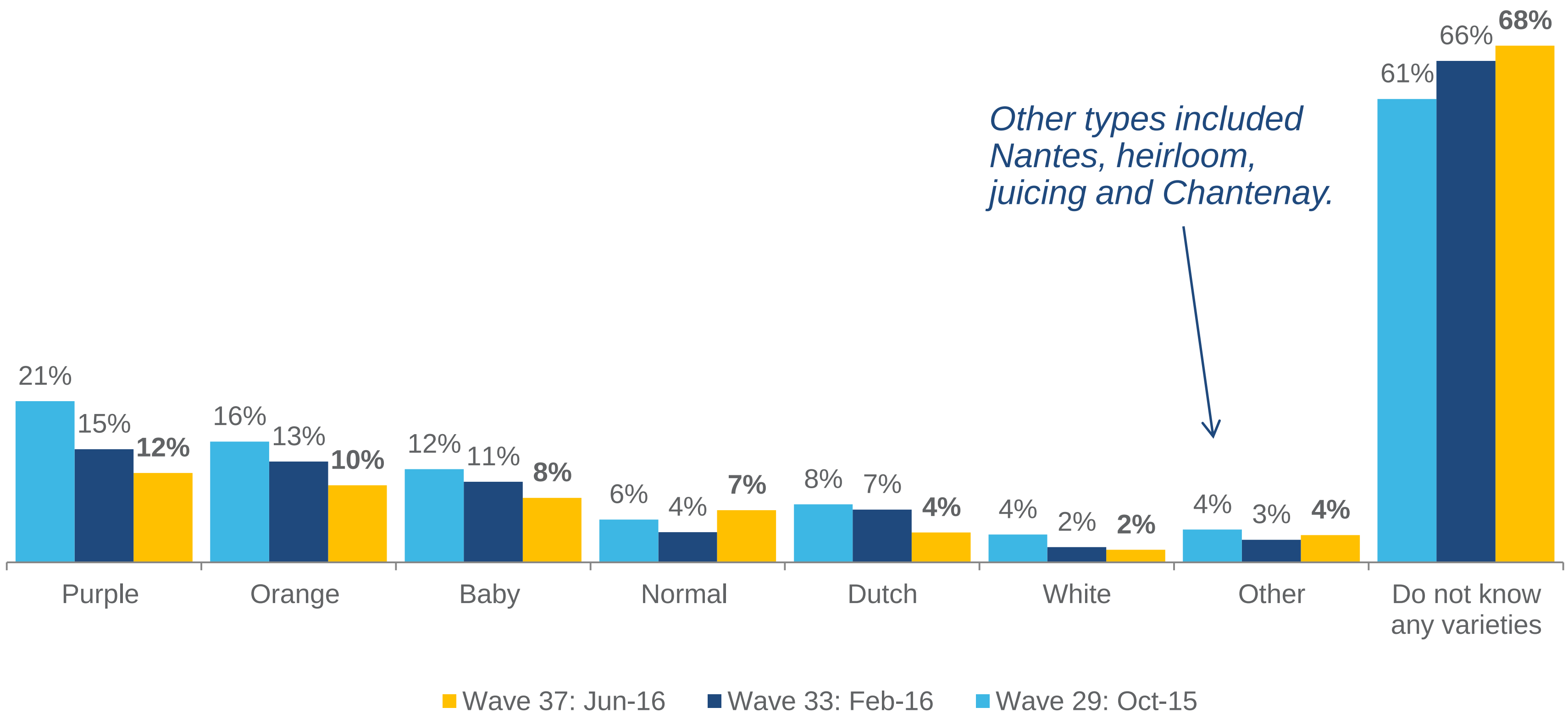
Carrots



- The average price of carrots was $1.79 per kg, which was slightly lower than the previous wave.
- There was a retail price range of $1.40 per kg, with the cheapest price found in Sydney and Canberra ($1.00 per kg) and the most expensive price found at Coles in Sydney ($2.50 per kg).

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

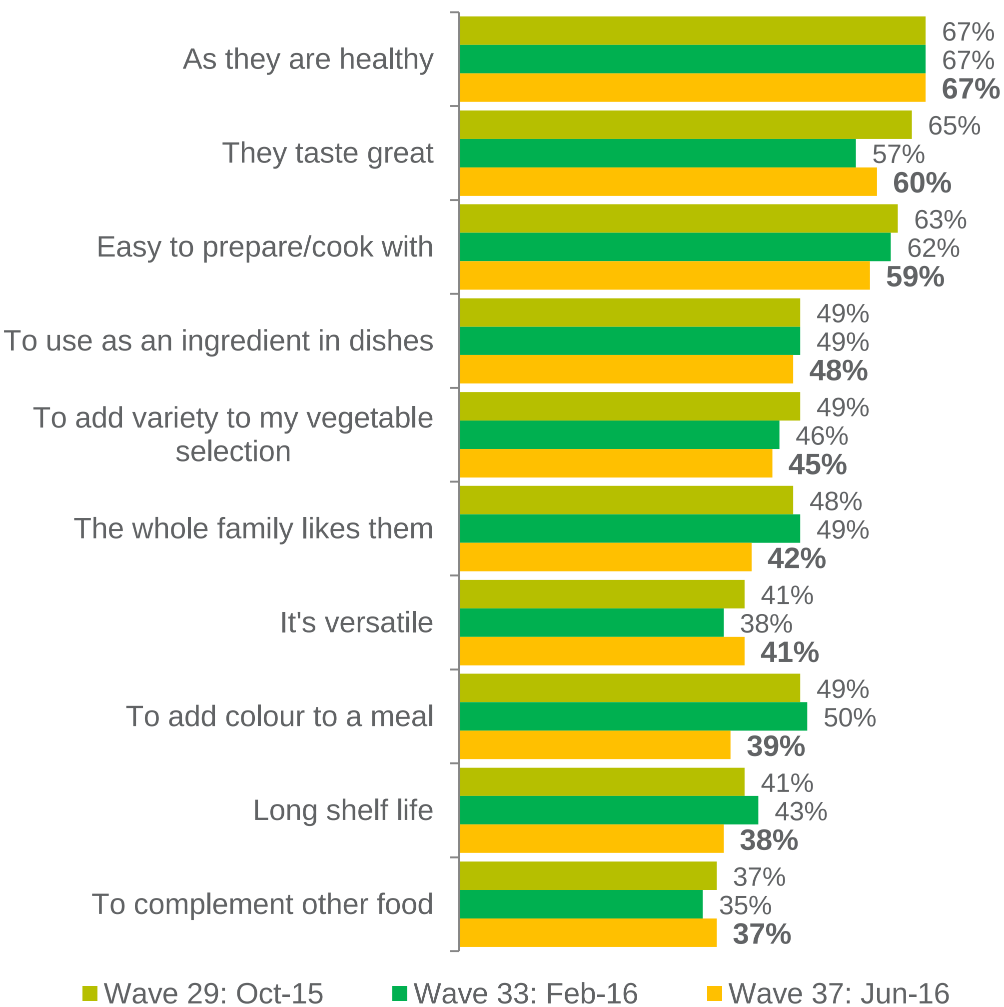
Two thirds of consumers are unable to recall a type of carrot. Colour remains the main trigger for unprompted carrot variety awareness, but this has trended downwards over the last three waves.



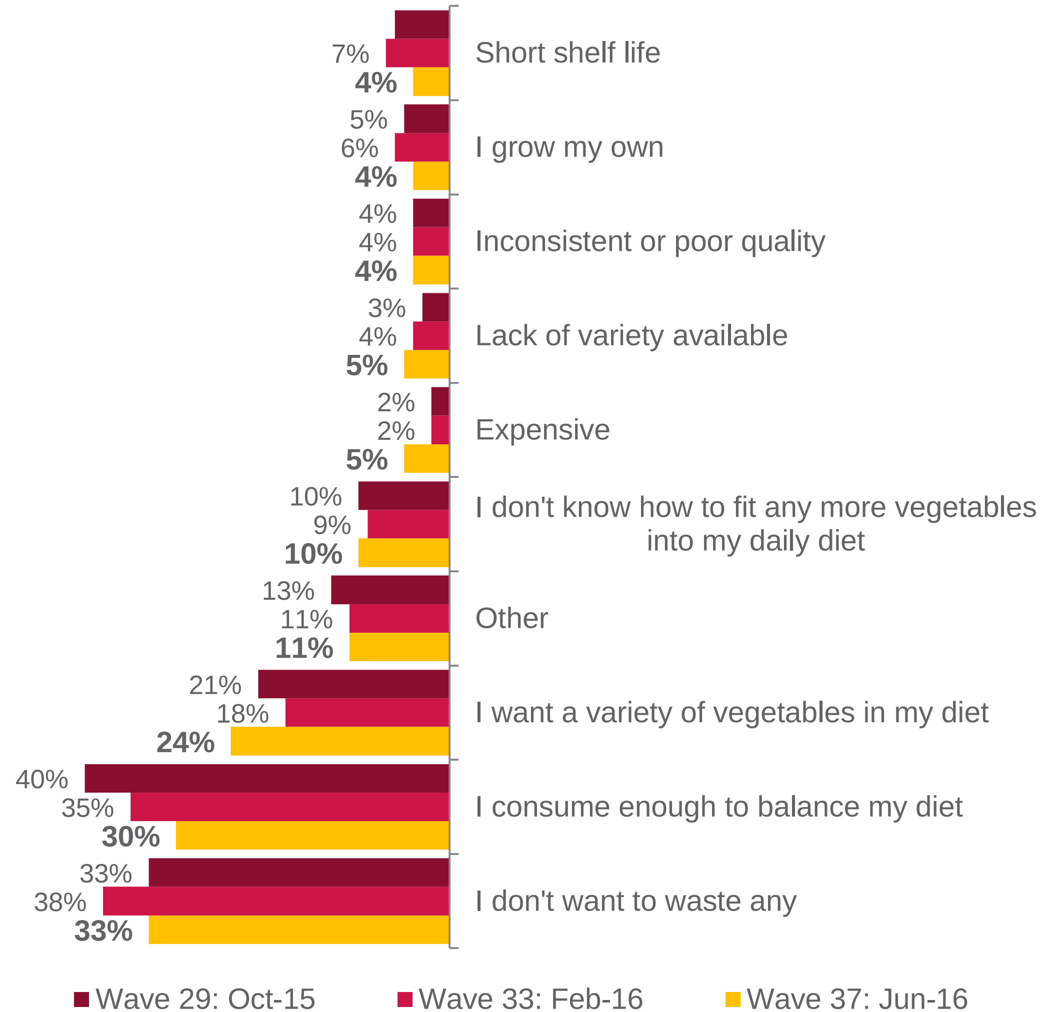
Q6a. What varieties/types of carrot are you aware of? (unprompted)
Sample Wave 29 N=302, Wave 33 N=302, Wave 37 N=306

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

Triggers



Barriers



Q7. Which of the following reasons best describes why you purchase carrot?
Q8. Which reason best describes why you don't buy carrot more often?
Sample Wave 29 N=302, Wave 33 N=302, Wave 37 N=306

Top 5 Consumption Occasions

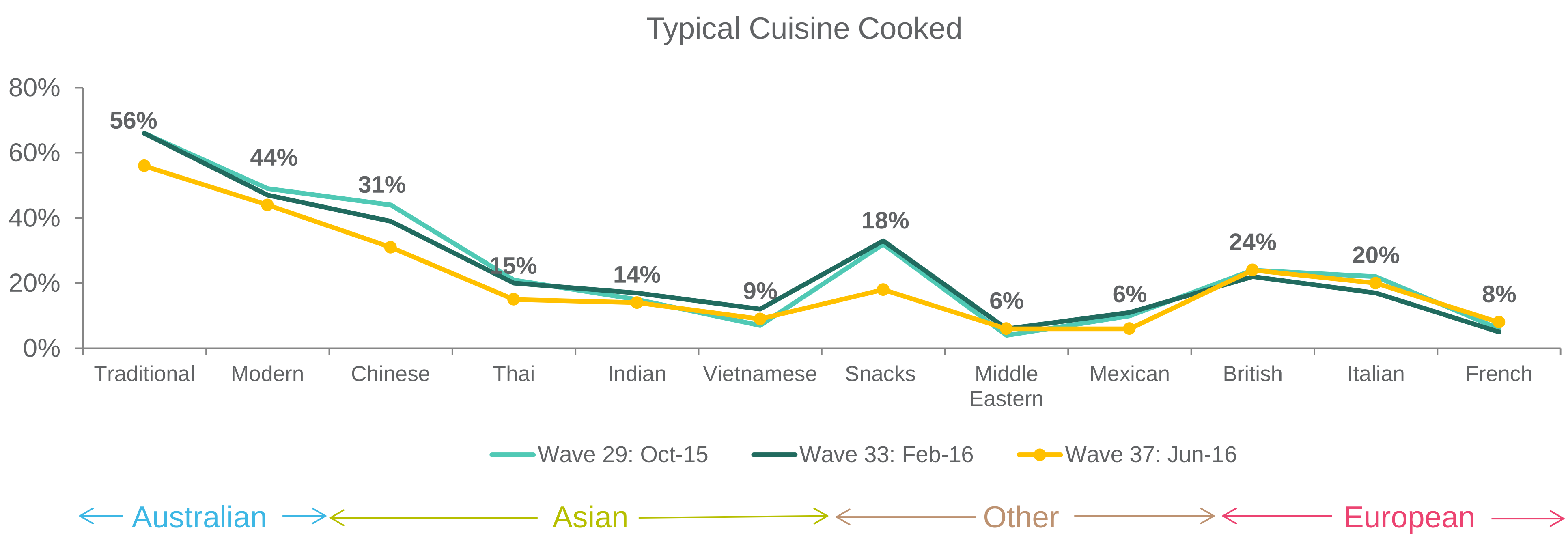
	Wave 33	Wave 37
Dinner	80%	**78%**
Family meals	66%	**59%**
Weekday meals	60%	**51%**
Quick Meals	49%	**43%**
Weekend meals	47%	**43%**

16% use when cooking a new recipe

▲ 23%, Wave 33

Carrots are typically cooked in Australian and Chinese cuisine. This wave sees a significant decline in carrots being consumed as a snack.

Dinner remains the dominant meal occasion.



Q10. What cuisines do you cook/consume that use carrot?
Q11. Which of the following occasions do you typically consume/use carrot?
Sample Wave 29 N=302, Wave 33 N=302, Wave 37 N=306

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

Carrots are typically served with potatoes, broccoli and pumpkin.

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

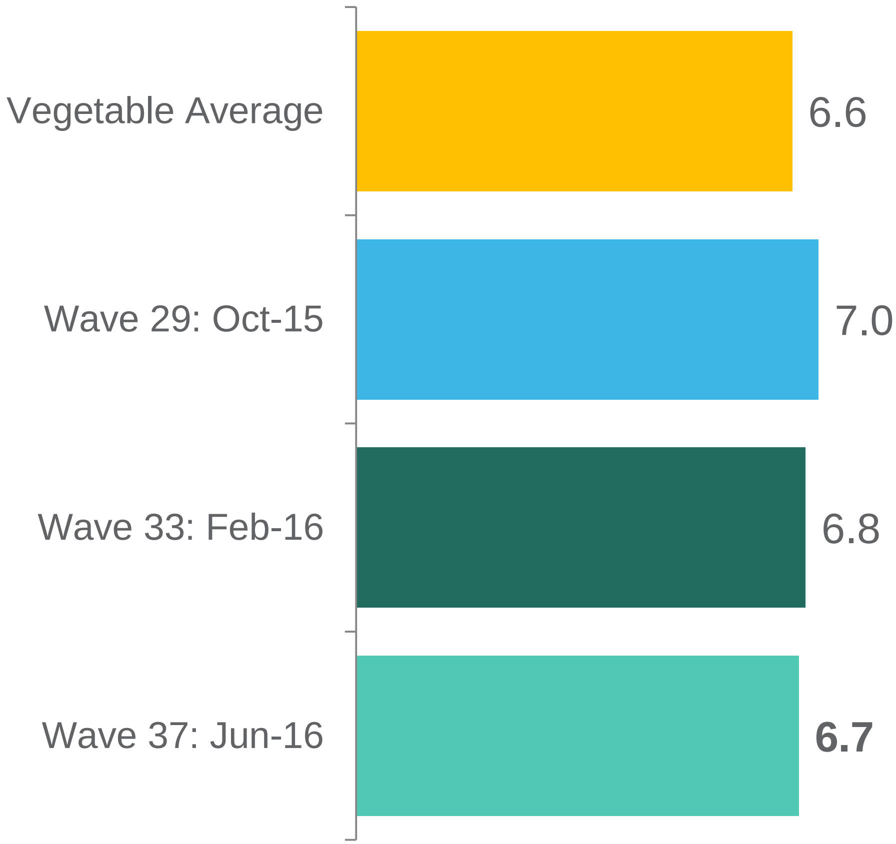
Accompanying Vegetables

Potato	68%
Broccoli	47%
Pumpkin	33%
Cauliflower	32%
Sweet Potato	32%

Top 10 Cooking Styles			
	Wave 29	Wave 33	Wave 37
Raw	57%	58%	**47%**
Stir frying	55%	52%	**46%**
Boiling	43%	42%	**45%**
Steaming	53%	50%	**45%**
Roasting	52%	50%	**44%**
Soup	36%	33%	**42%**
Baking	21%	26%	**24%**
Slow Cooking	24%	28%	**21%**
Microwave	21%	26%	**15%**
Frying	7%	7%	**10%**

Q9. How do you typically cook carrot?
Q10a. And when are you serving carrot which of the following do you also serve together with this?
Sample Wave 29 N=302, Wave 33 N=302, Wave 37 N=306

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

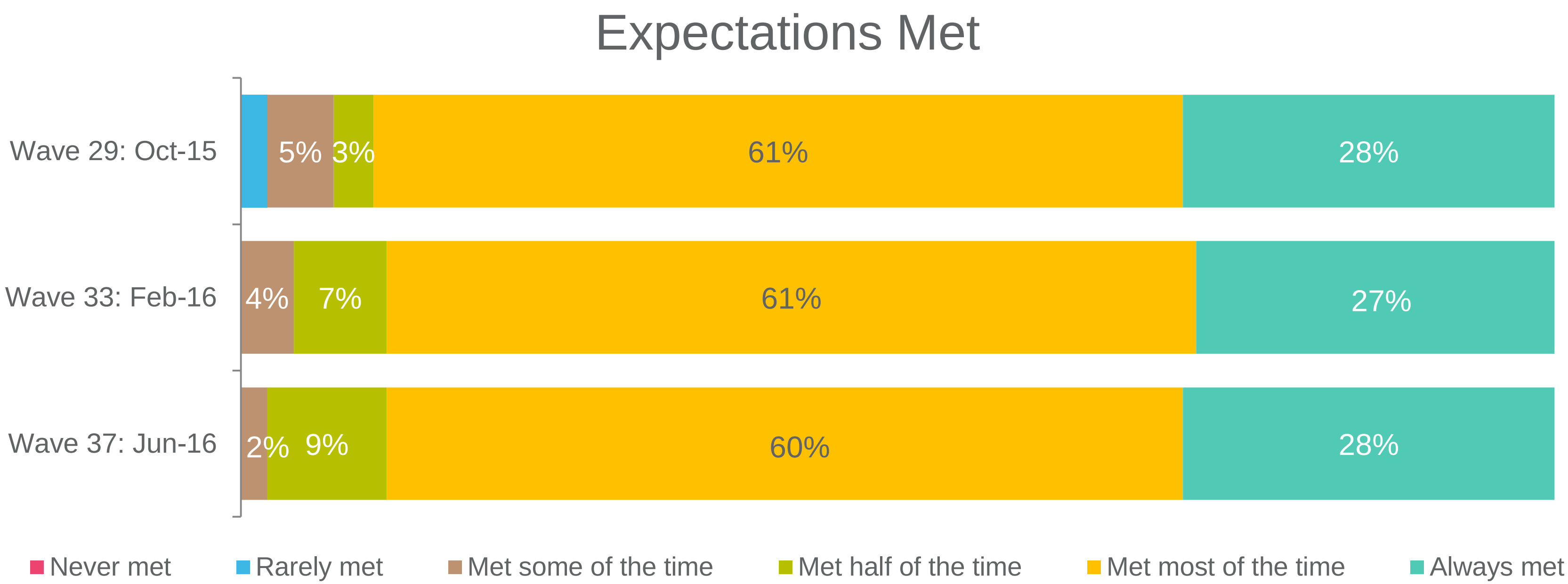


Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 29 N=302, Wave 33 N=302, Wave 37 N=306

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

Expected to stay fresh for **12.8** days

▼ 12.3 days, Wave 29
▼ 12.7 days, Wave 33



Q12. How long do you expect carrots to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy carrots?
Sample Wave 29 N=302, Wave 33 N=302, Wave 37 N=306

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

Carrot Product Launch Trends.

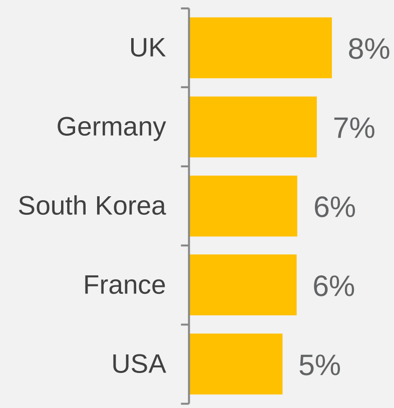
Carrot Global NPDs

March – June 2016

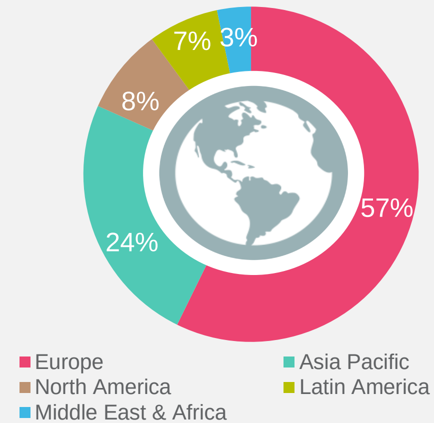
There were 2085 global new products launched over the last 3 months that contained carrot as an ingredient, a large decline from the previous wave (2499). The majority of these launches occurred in Europe. Flexible packaging was the most common format, and the key launch category was meals.

2085 Global NPDs

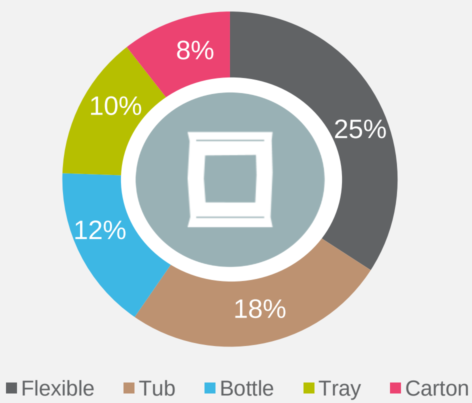
Country



Region



Top Pack Formats



Categories

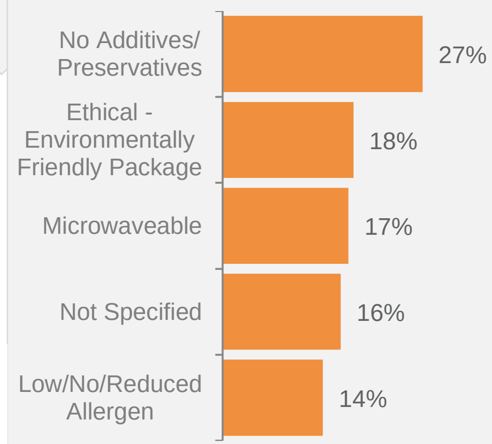
Meals 20%

Dairy 10%

Sauces & Seasonings 9%

Juice Drink 8%

Top Claims



Carrot Product Launches:
Last 3 Months (March – June 2016)
Summary

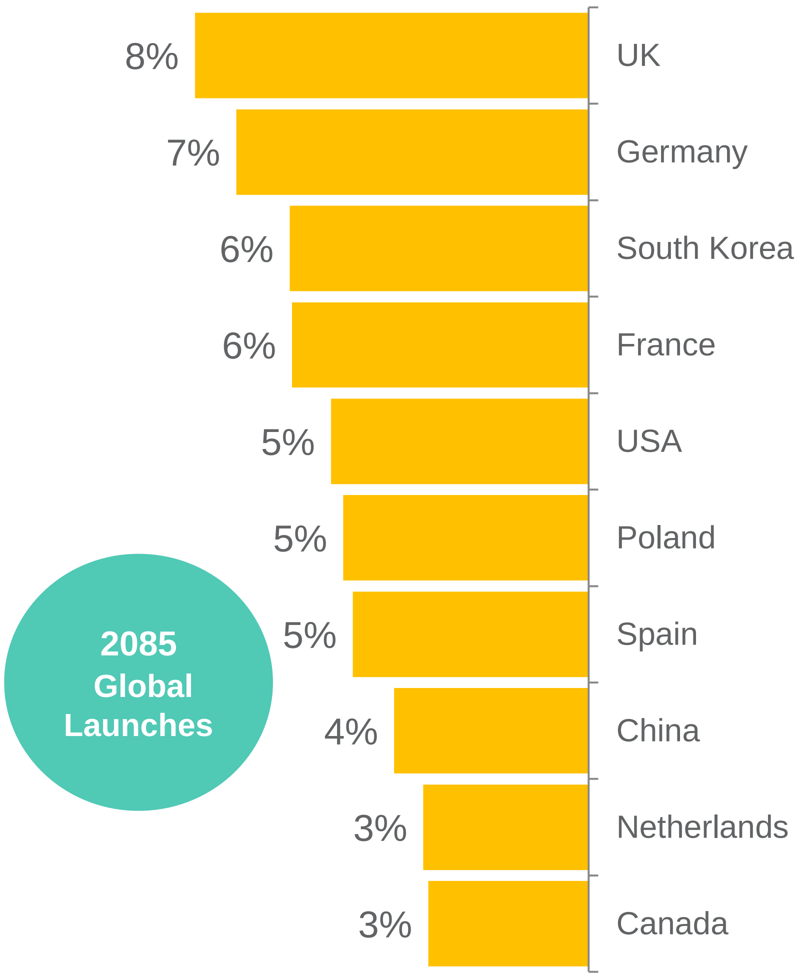
- A total of 2085 products containing carrot as an ingredient were launched globally in the last 3 months, which has decreased since the previous wave (2499 launches).
- There were 39 carrot-containing products launched in Australia in the last quarter. See upcoming pages for examples of Australian launches.
- Europe and the Asia Pacific were the 2 top regions for these product launches (57% and 24% respectively).
- The top pack formats used were flexible formats (25%) and tubs (18%).
- The top categories for product launches were meals (20%), dairy (10%), sauces & seasonings (9%) and juice drinks (8%).
- The top claims used for launches globally were no additives/preservatives (27%), ethical - environmentally friendly (18%) and microwaveable (17%).
- The most innovative launch found was carrot jam from Iran. Examples of these products can be found at the end of the carrot trend report.

Source: Mintel (2016)

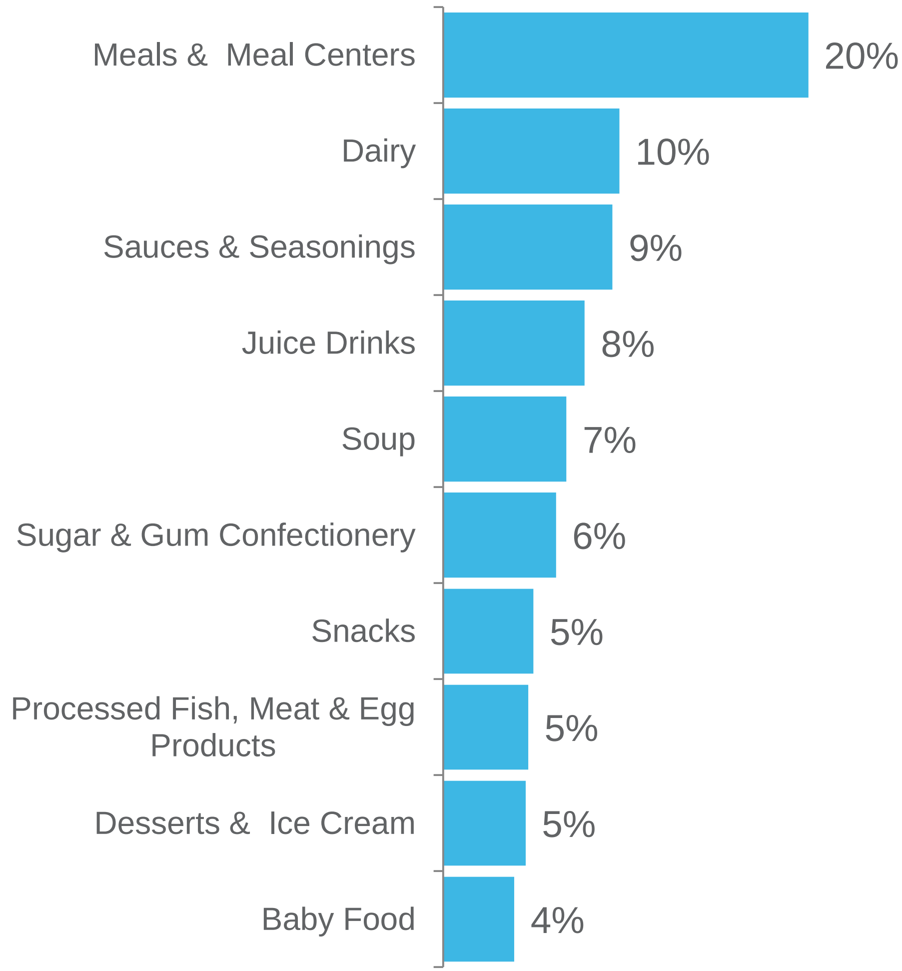
Carrot Launches
Country & Categories

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

Top Launch Countries



Top Launch Categories



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Carrot Launches

Top Claims & Pack Formats Used

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

Pack Formats Used

Global	Flexible	25%
	Tub	18%
	Bottle	12%
Europe	Flexible	23%
	Tub	23%
	Bottle	12%
Asia Pacific	Flexible	31%
	Tub	14%
	Flexible stand-up pouch	10%

Top Claims Used

Global	No Additives/Preservatives	27%
	Ethical - Environmentally Friendly Package	18%
	Microwaveable	17%
Europe	No Additives/Preservatives	25%
	Ethical - Environmentally Friendly Package	20%
	Microwaveable	16%
Asia Pacific	No Additives/Preservatives	31%
	Microwaveable	19%
	Time/Speed	19%

Innovative Carrot Launches:
L3M (March – June 2016)

Innocent Orange & Carrot Juice (Netherlands)

Innocent Orange & Carrot Juice is now available. The sustainably sourced product retails in a recyclable 900ml pack featuring the FSC logo and a Facebook invitation. The manufacturer states to donate 10% of the profits to charity.

Claims:

Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Ethical - Charity, Social Media

It Tastes Raaw Carrot Lemonade Juice (Mexico)

It Tastes Raaw Jugo de Zanahoria y Limonada (Carrot Lemonade Juice) has been relaunched. The all natural product contains no preservatives, artificial colours or flavouring, and is made with 100% fruit and vegetable juice. It comprises carrot and lemon juice in a blend of pineapple and apple juice from concentrate with natural ingredients. Carrots and lemons, blended together are rich in vitamin A.

Claims:

No Additives/Preservatives, All Natural Product, Other (Functional), Antioxidant, Immune System (Functional), Ethical - Environmentally Friendly Package, Vegan, No Animal Ingredients, GMO-Free

Coop Änglamark Organic Corn and Rice Snack with Carrot and Apple (Denmark)

Coop Änglamark Økologiske Majs & Ris Snacks Gulerod og Æble (Organic Corn and Rice Snack with Carrot and Apple) is said to be a delicious crunchy snack with a mild and slightly sweet taste. The product is recommended for babies older than eight months and contains no added sugar. It retails in a 15g pack featuring KRAV, Debio and EU Green Leaf logos.

Claims:

Low/No/Reduced Sugar, Organic, Babies & Toddlers (0-4)

Baby Best Carrot Baby Noodles (Taiwan)

Baby Best Carrot Baby Noodles are said to be suitable for babies aged nine months and older. The product is ready to cook, and free from preservatives, artificial colouring and flavours. It retails in a 200g pack bearing the Facebook logo.

Claims:

No Additives/Preservatives, Babies & Toddlers (0-4), Ease of Use, Social Media

Source: Mintel (2016)

Innovative Carrot Launches:
L3M (March – June 2016)

Smood Gluten Free Classic Croutons (Germany)

Smood Croutons Classic - Ungewürzt (Gluten Free Classic Croutons) are now available. They are made of vegetables, fruit and wholegrain oats, are not fried and contain less fat and salt. This product is said to be ideal with soups, salads or for nibbling, and retails in a 100g pack.

Claims:
Low/No/Reduced Fat, Low/No/Reduced Sodium, Gluten-Free, Wholegrain, Low/No/Reduced Allergen

Gosh! Mixed Seed, Quinoa, Carrot, & Coriander Bakes (UK)

Gosh! Mixed Seed, Quinoa, Carrot & Coriander Bakes are now available. These bakes feature a minted pea centre, are suitable for vegans, vegetarians, and coeliacs, and free from gluten, egg, dairy, nut, and soya. Furthermore, these bakes are free from the most common food allergens, including cereals containing gluten, lupin, celery, mustard, sesame seeds, and sulfites, have been approved by the Vegetarian Society, and are suitable for home freezing.

Claims:
Vegetarian, Gluten-Free, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Package, Vegan, Ease of Use, No Animal Ingredients, Social Media

Sprout Organic Baby Food with Carrot, Apple, Mango (South Korea)

Sprout Organic Baby Food with Carrot, Apple, Mango is suitable for babies over six months of age. The product is certified organic by QAI and USDA, and retails in a 113g BPA-free pack and with a recyclable cap.

Claims:
Organic, Babies & Toddlers (0-4), Ethical - Environmentally Friendly Package

BemNutrir Carrot Bread (Brazil)

BemNutrir Pão de Cenoura (Carrot Bread) is available in a newly designed 500g pack. This bread is made from a homemade recipe and contains no gluten, eggs, lactose, sugar or preservatives.

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

Source: Mintel (2016)

Innovative Carrot Launches:
L3M (March – June 2016)

Saveurs Créoles Vegetable Achard (France)

Saveurs Créoles Achard de Légumes (Vegetable Achard) is now available. This 100% traditional product retails in a 200g pack.

Claims:
N/A

Carrot Sun Carrot Sun Cream (UK)

Carrot Sun Carrot Sun Cream, suitable for normal body and face skin of all kind of tones, is developed to quickly provide a deeper, darker and faster tan. The fast activating and long lasting cream blends: a 'unique' formulation of natural tan accelerating agents L-tyrosine and carrot oil, rich in carotene antioxidant, vitamin A and omega-3 fatty acids to stimulate and promote the skin's natural melanin production when exposed to the sun that will develop a safe, dark and long-lasting tan.

Claims:
Botanical/Herbal, Antioxidant, Waterproof, Ethical - Animal, Long-Lasting*, Moisturising / Hydrating, Time/Speed

Asana Carrot Jam (Iran)

Asana Carrot Jam has been repackaged. The product retails in a newly designed 300g jar.

Claims:
N/A

Happy Family Balanced Baby Porridge (Taiwan)

Happy Family Balanced Baby Porridge is made with a chicken bone soup base, grains and multiple vegetables. This microwavable porridge has a high fibre content to maintain babies' health is suitable for kids aged eight months and older. The HACCP certified product is free from preservatives and artificial flavours and retails in a 150g pack.

Claims:
No Additives/Preservatives, High/Added Fiber, Other (Functional), Microwaveable, Babies & Toddlers (0-4)

Source: Mintel (2016)

Top Australian Carrot Launches:
L3M (March – June 2016)

Australian Eatwell Tomato, Onion & Basil Vegetable Sausages

Campbell's Real Soup Base Chinese Soup Base

Pop Tops Fruit & Veg Apple, Carrot & Orange Drink

V8 Power Blend Orange Kick Veggie and Fruit Juice

Fodmapped For You! Butter Chicken Curry Simmer Sauce

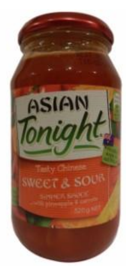
The Daily Juice Company Nourish Carrot, Orange, Apple, Apricot, Lemon & Ginger Juice

The Real Homestyle Soup Aussie Angus Beef & Ale Soup

The Real Skinny Soup Pumpkin & Sweet Potato Soup

Herbert Adams 8 Hour Slow-Cooked Lamb & Rosemary Pie

Asian Tonight Tasty Chinese Sweet & Sour Simmer Sauce



Mushiki Wagu Beef & Chilli Gyoza

Woolworths Sweet Potato, Carrot & Chilli with Croutons Soup

Source: Mintel (2016)

Cauliflower.

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

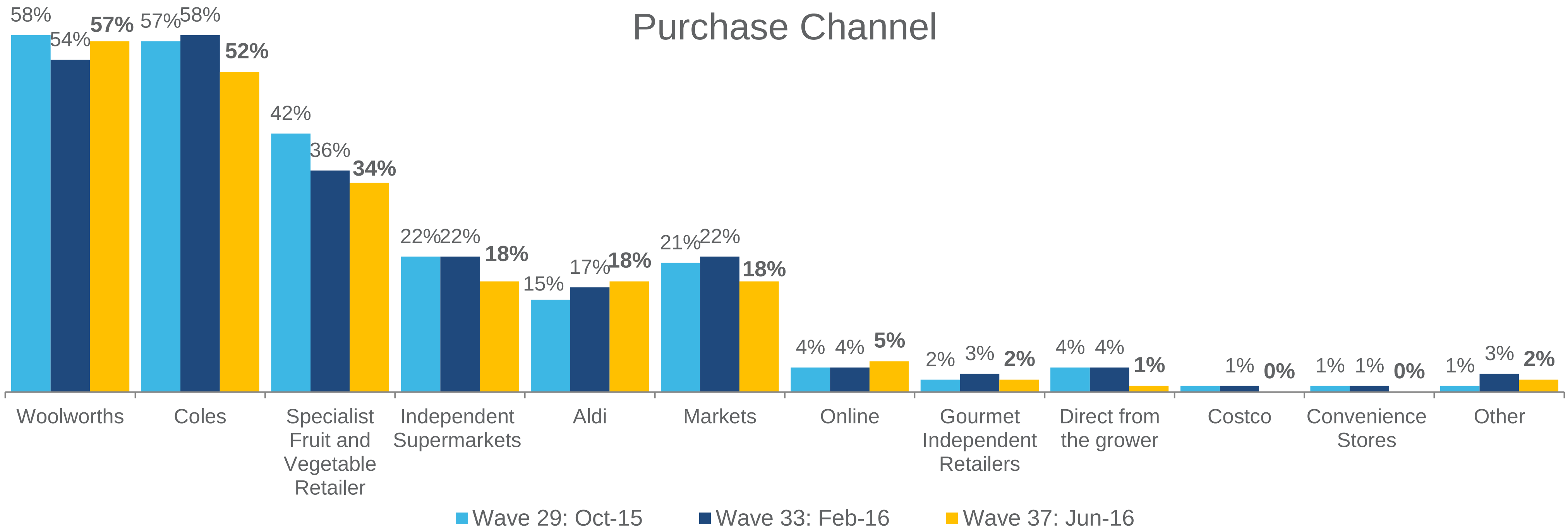
Cauliflower is typically purchased from mainstream retailers, whilst purchase from Aldi continues to increase.

Average Purchase **3.4** times per month

3.4 times, Wave 29
3.3 times, Wave 33

Average Consumption **8.0** times per month

8.1 times, Wave 29
8.2 times, Wave 33



Q1. On average, how often do you purchase cauliflower?
Q2. On average, how often do you consume cauliflower?
Q5. From which of the following channels do you typically purchase cauliflower?
Sample Wave 29 N=301, Wave 33 N=301, Wave 37 N=304

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

Average Spend and Price Sensitivity

Average weight of purchase

The typical consumer purchases **0.9kg** of cauliflower, relatively consistent with past months.

▲ 1.0kg, Wave 29
▲ 1.0kg, Wave 33

Recalled last spend

Recalled last spend on cauliflower is **$3.50,** slightly higher than previous waves.

▼ $3.30, Wave 29
▼ $3.40, Wave 33

Value for money

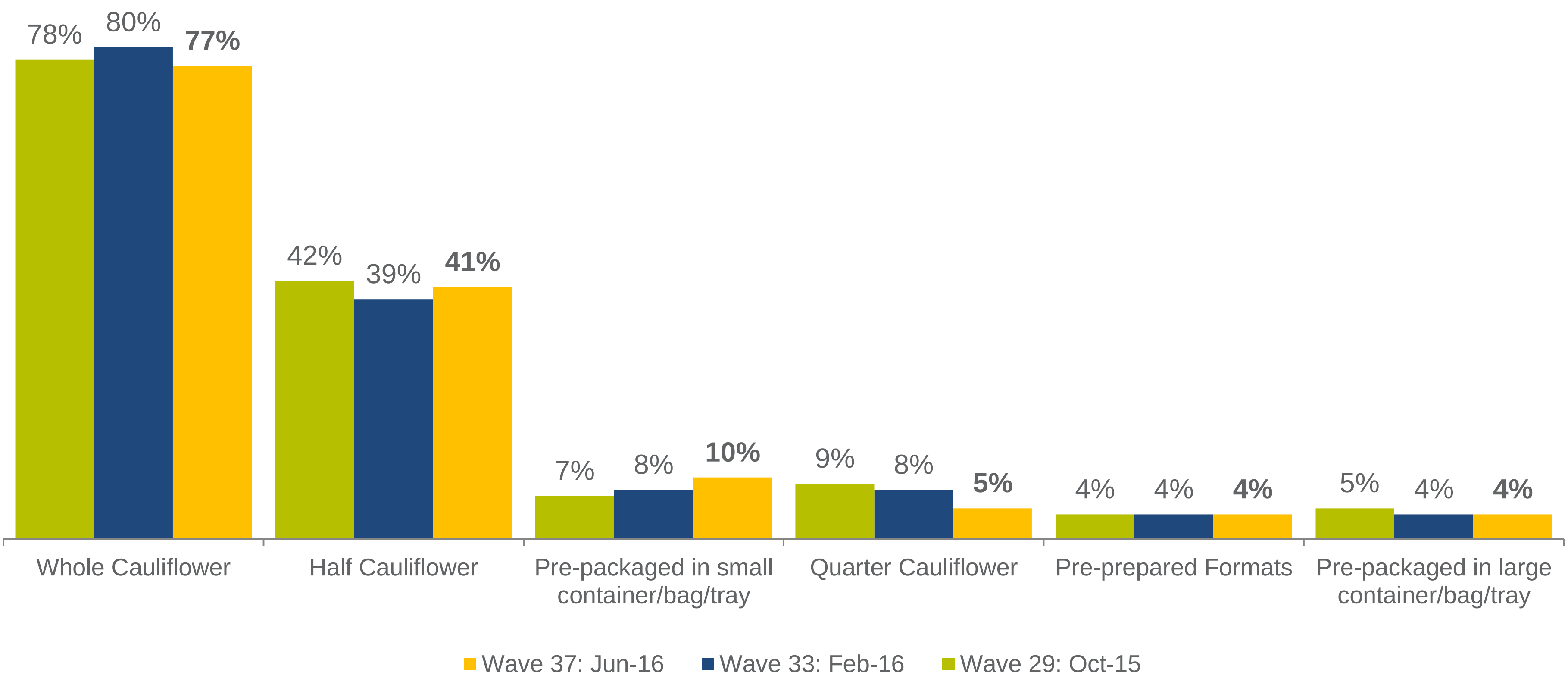
Consumers perceive cauliflower to be relatively good value for money **(6.2/10)**, which has increased this wave.

▲ 6.6/10, Wave 29
▼ 5.9/10, Wave 33

Q3. How much cauliflower do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? 0-10 scale
Sample Wave 29 N=301, Wave 33 N=301, Wave 37 N=304

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

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



Q4b. In what fresh formats do you typically purchase cauliflower?
Sample Wave 29 N=301, Wave 33 N=301, Wave 37 N=304

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Online and In-store Commodity Prices

Cauliflower

The average price for Cauliflower in Australia was $4.69ea

Darwin, NT
Woolworths: $5.98ea
Coles: $5.50ea

Brisbane, QLD
Woolworths: $3.98ea /$5.48ea
Coles: $5.50ea / $5.50ea

Perth, WA
Woolworths: $4.98ea
Coles: **$3.00ea**

Adelaide, SA
Woolworths: $5.48ea / $5.48ea
Coles: $5.50ea / $5.50ea

Sydney, NSW
Woolworths: N/A / $3.98ea
Coles: **$3.00ea** / **$3.00ea**

Canberra, ACT
Woolworths: $3.90ea
Coles: $3.00ea

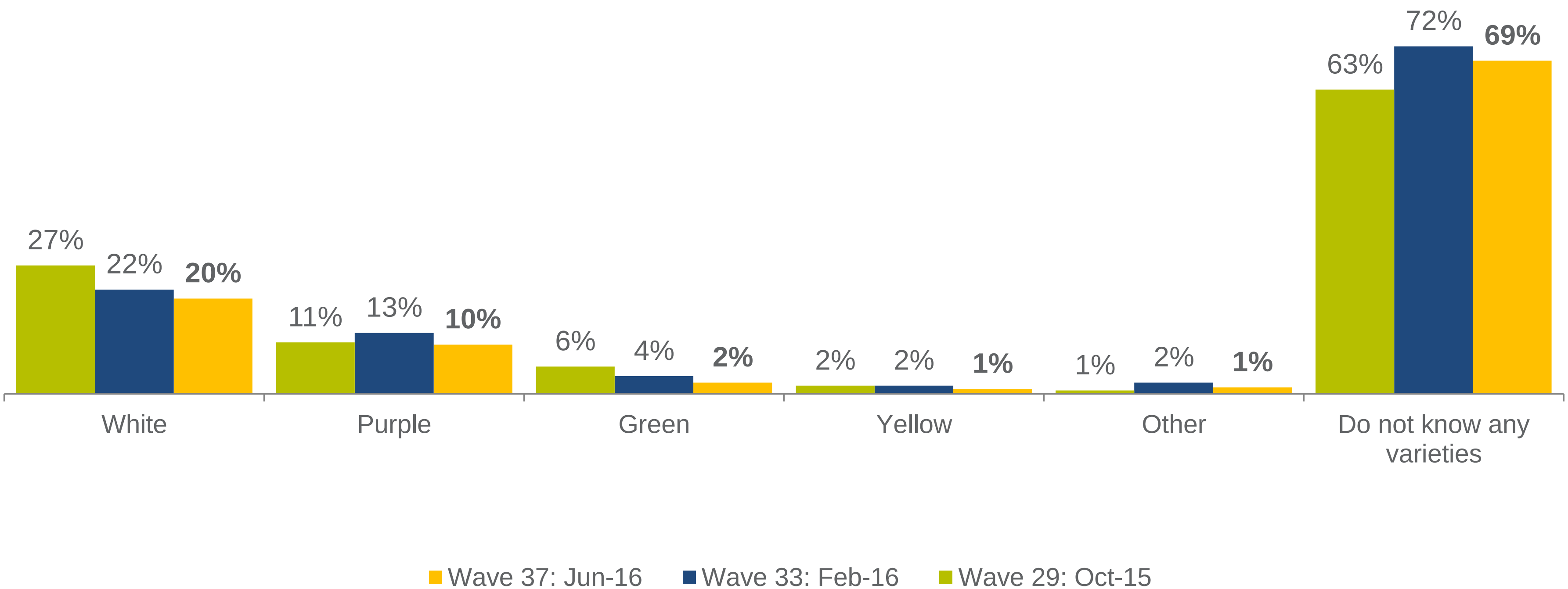
Melbourne, VIC
Woolworths: $4.90ea / $4.90ea
Coles: $4.50ea / $4.50ea

Hobart, TAS
Woolworths: $4.75ea
Coles: $5.50ea

- The average price per cauliflower was $4.69 each, slightly lower than the previous wave ($5.03 each).
- The most expensive cauliflowers were found in Darwin, at $5.98 each. The cheapest were Sydney and Perth at $3.00 each.
- The retail price range this month was $2.98.

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

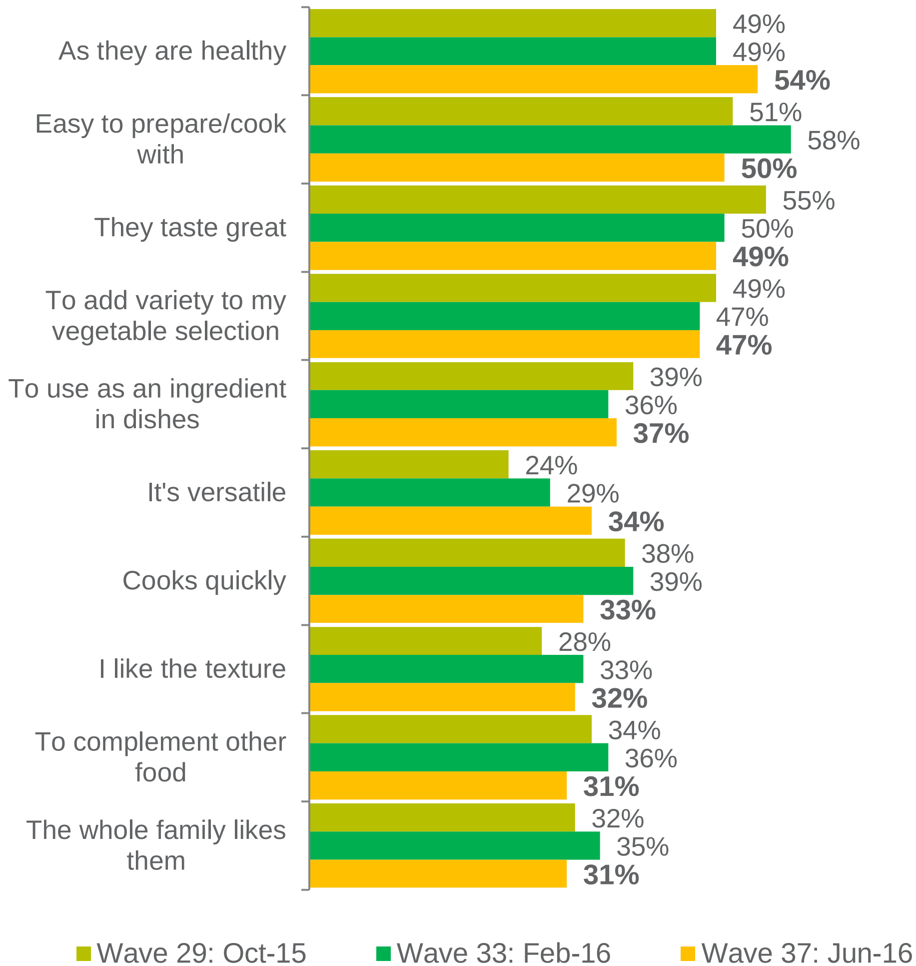
Spontaneous awareness remains very low. Consumers are most likely to recall white and purple as the main varieties of cauliflower.



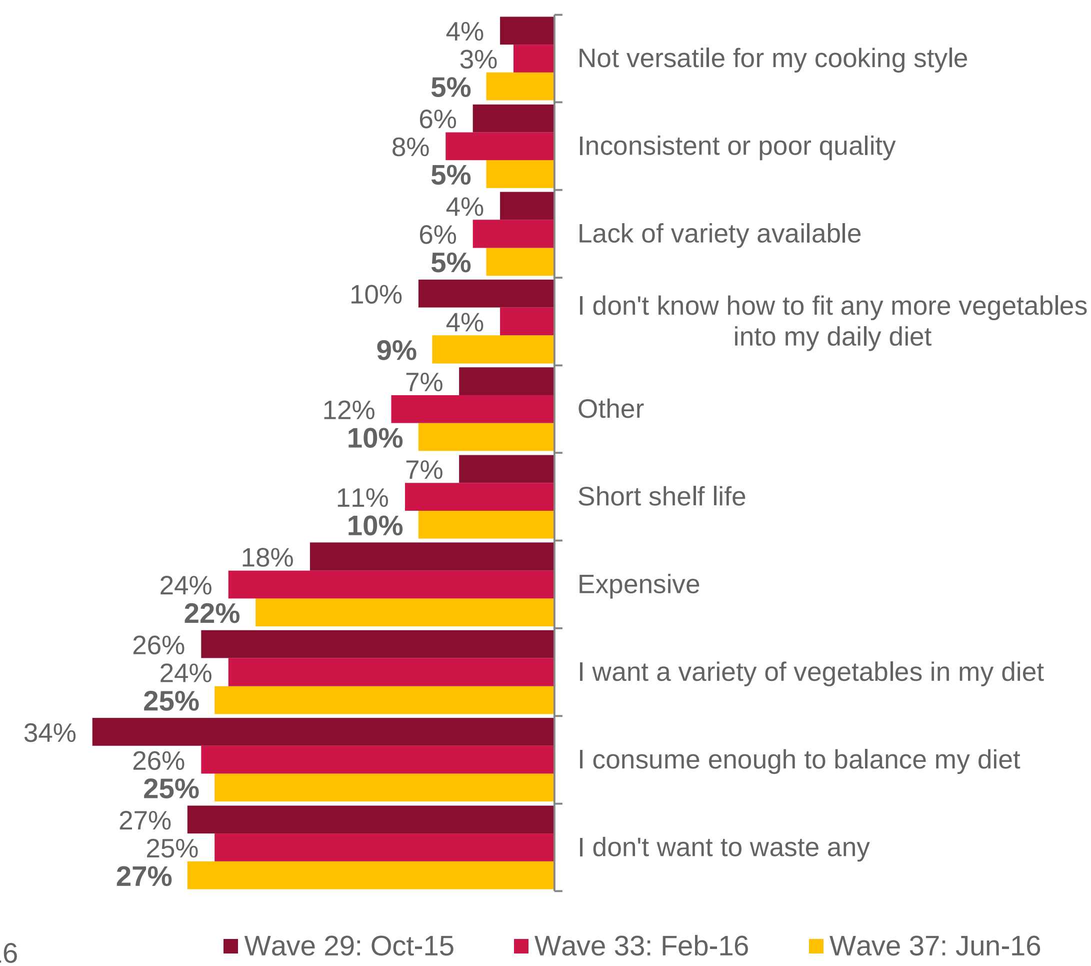
Q6a. What varieties of cauliflower are you aware of? (unprompted)
Sample Wave 29 N=301, Wave 33 N=301, Wave 37 N=304

Health and ease of preparation are the primary influences on purchase. Not wanting to waste any and already consuming enough are the key barriers inhibiting purchase. There has been an increasing trend in versatility as a trigger to purchase.

Triggers



Barriers



Q7. Which of the following reasons best describes why you purchase cauliflower?
Q8. Which reason best describes why you don't buy cauliflower more often?
Sample Wave 29 N=301, Wave 33 N=301, Wave 37 N=304

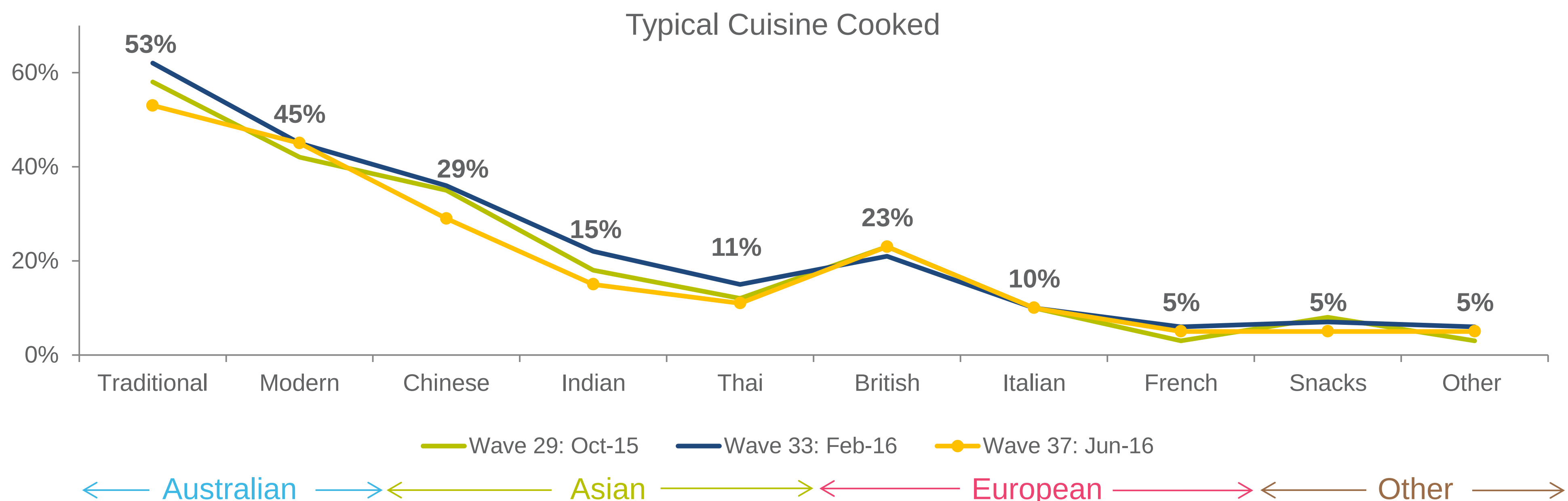
Consumers prefer to cook cauliflower in Australian and Asian cuisine. Dinners and family meals are the key meal occasions.

Top 5 Consumption Occasions

	Wave 33	Wave 37
Dinner	72%	**74%**
Family meals	69%	**57%**
Weekday meals	51%	**44%**
Weekend meals	40%	**36%**
Quick Meals	37%	**24%**

13% used cauliflower when cooking a new recipe

▲ 20%, Wave 33



Q10. What cuisines do you cook/consume that use cauliflower?
Q11. Which of the following occasions do you typically consume/use cauliflower?
Sample Wave 29 N=301, Wave 33 N=301, Wave 37 N=304

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

Cauliflower is generally steamed, boiled and stir fried. Carrots and potatoes are served with cauliflower, consistent with past waves.

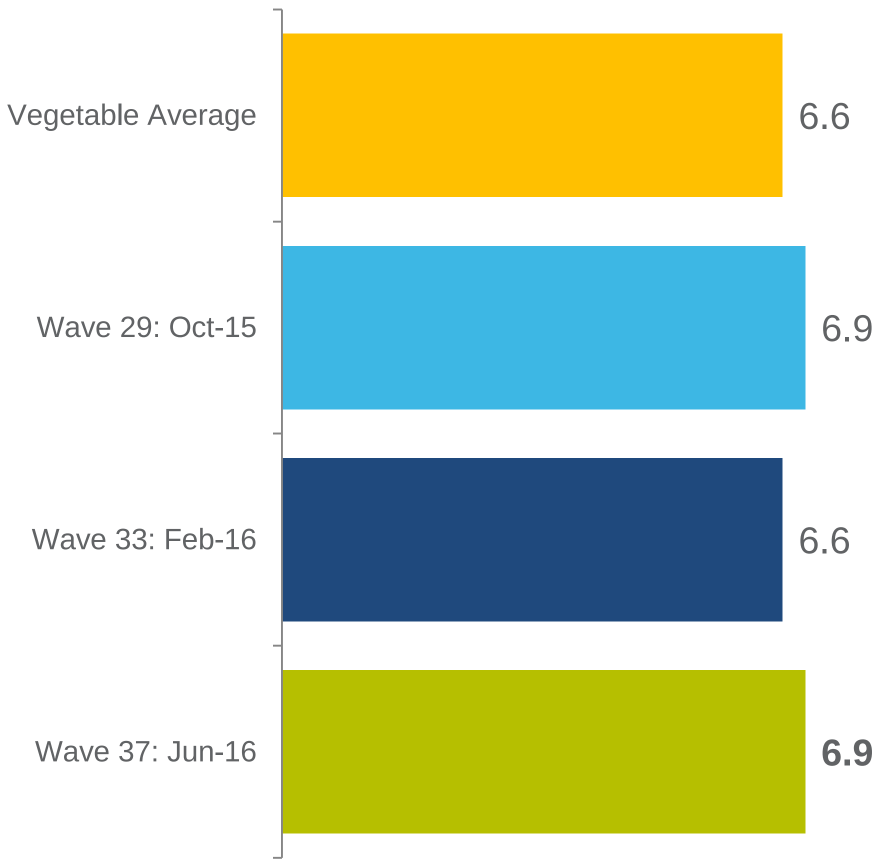
Accompanying Vegetables

Carrot	57%
Potato	55%
Broccoli	47%
Pumpkin	33%
Sweet Potato	29%

Top 10 Cooking Styles			
	Wave 29	Wave 33	**Wave 37**
Steaming	63%	62%	**54%**
Boiling	41%	42%	**41%**
Stir frying	45%	50%	**36%**
Soup	28%	31%	**26%**
Baking	18%	23%	**18%**
Microwave	22%	25%	**17%**
Roasting	17%	20%	**16%**
Mashing	9%	10%	**11%**
Sautéing	11%	7%	**10%**
Slow Cooking	14%	13%	**9%**

Q9. How do you typically cook cauliflower?
Q10a. And when are you serving cauliflower which of the following do you also serve together with this?
Sample Wave 29 N=301, Wave 33 N=301, Wave 37 N=304

Importance of cauliflower provenance has returned to levels seen in Wave 29. Knowing that cauliflower is grown in Australia remains the most important provenance information to consumers.



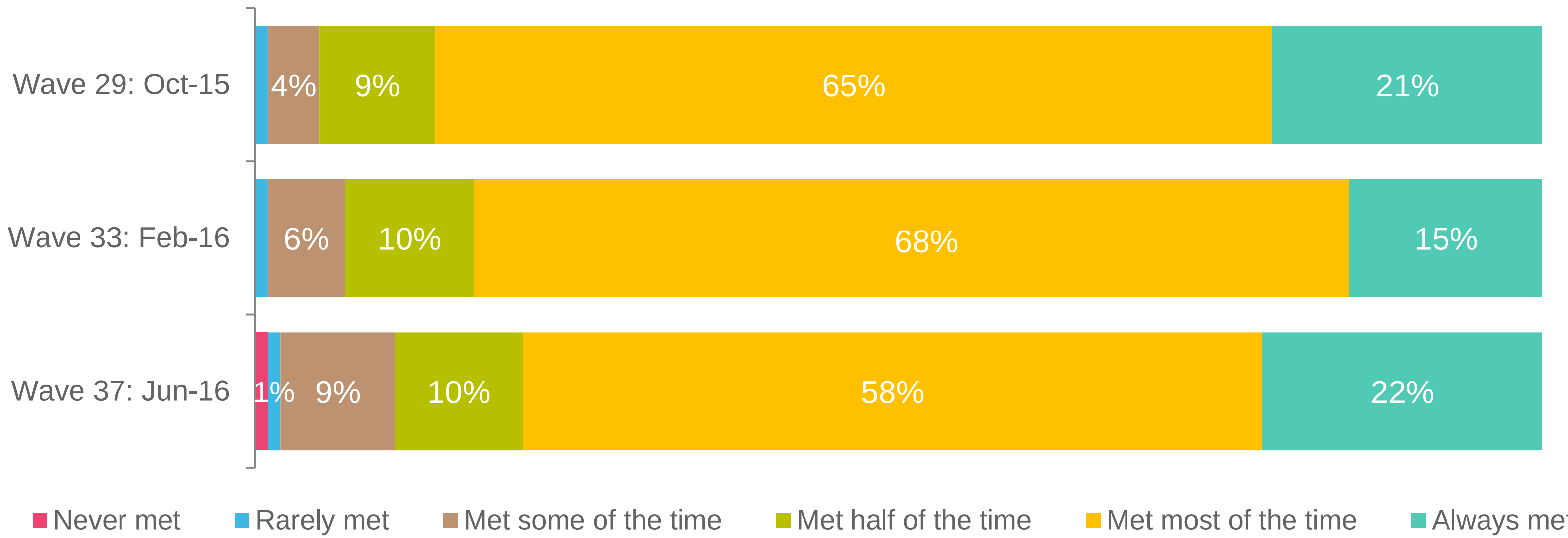
Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 29 N=301, Wave 33 N=301, Wave 37 N=304

Cauliflower is expected to remain fresh for around nine days once purchased, which has increased since the previous wave. This wave also sees a rise in expectations of freshness always being met.

Expected to stay fresh for **9.2** days

▼ 9.1 days, Wave 29
▼ 8.3 days, Wave 33

Expectations Met



Q12. How long do you expect cauliflower to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy cauliflower?
Sample Wave 29 N=301, Wave 33 N=301, Wave 37 N=304

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

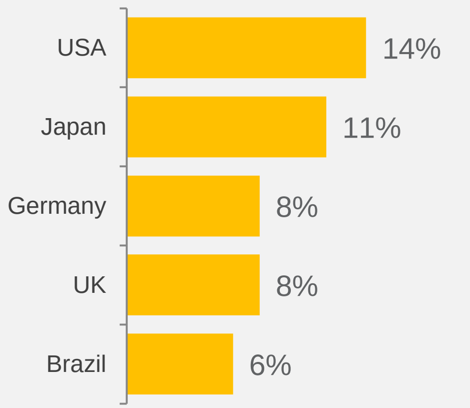
Cauliflower Product Launch Trends.

Cauliflower Global NPDs

March – June 2016

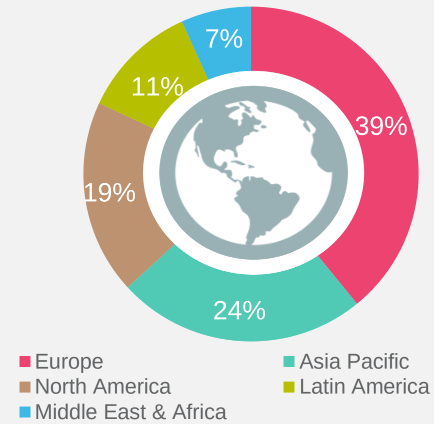
There were 133 products launched in the past three months that contained cauliflower. Europe and Asia Pacific were the main regions for launches, with USA and Japan the key countries. Flexible packaging remained the most common format. Launches were predominately in fruit and vegetable, meals and sauces categories.

Country

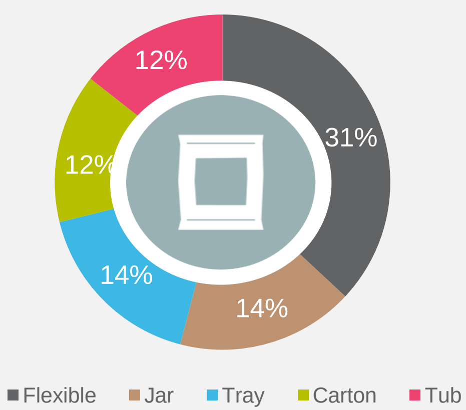


133 Global NPDs

Region



Top Pack Formats



Categories

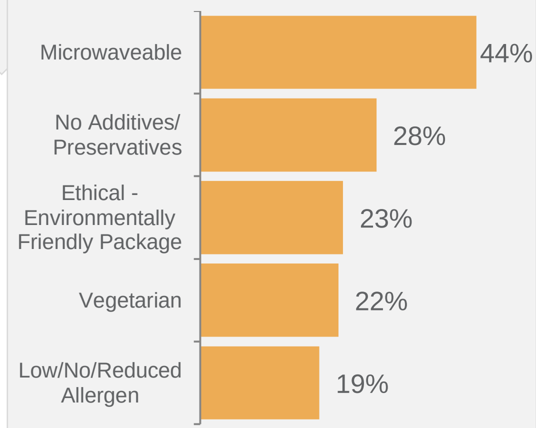
Fruit & Vegetables 26%

Meals 23%

Sauces & Seasonings 16%

Baby Food 10%

Top Claims



Cauliflower Product Launches:
Last 3 Months (March – June 2016)
Summary

- There were 133 products launched over the past 3 months that contained cauliflower as an ingredient, a decline from the previous wave.
- There were two cauliflower products launched in Australia in the past three months.
- Product launches were primarily in Europe (39%) and Asia Pacific (24%), with USA and Japan the key launch countries.
- Flexible (31%), jar (14%), and tray (14%) packaging were the top 3 pack formats.
- The top categories for launches were fruit and vegetables (26%), meals and meal centers (23%), and sauces and seasonings (16%).
- Claims typically used on products included microwaveable (44%), no additives/preservatives (28%), and ethical – environmentally friendly packaging (23%).
- The most innovative cauliflower launch this wave was cauliflower macaroni cheese with truffle flavoured oil from the UK. See following pages for examples of product launches.

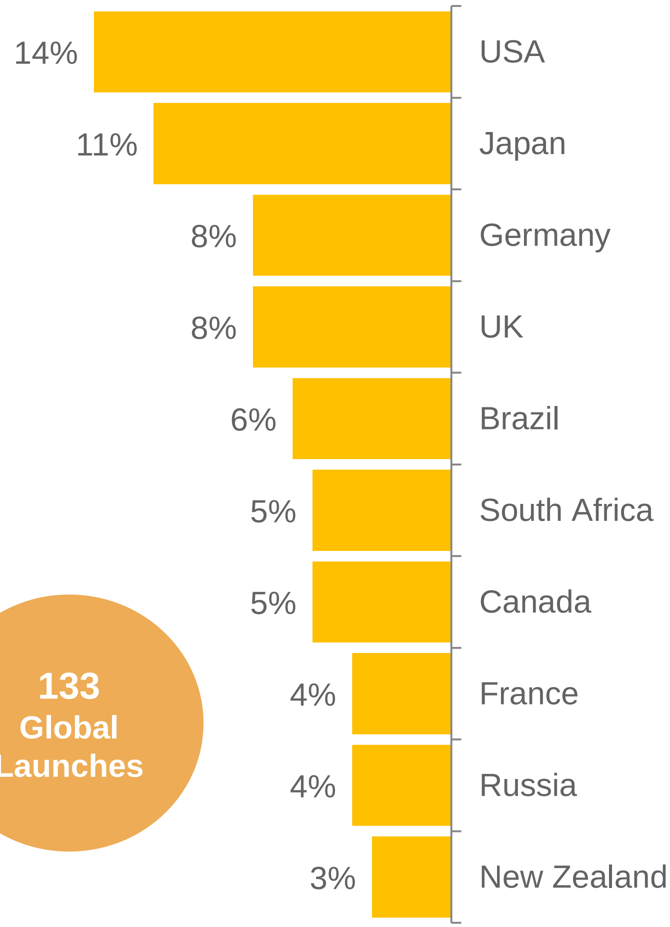
Source: Mintel (2016)

Cauliflower Launches

Country, Region & Categories

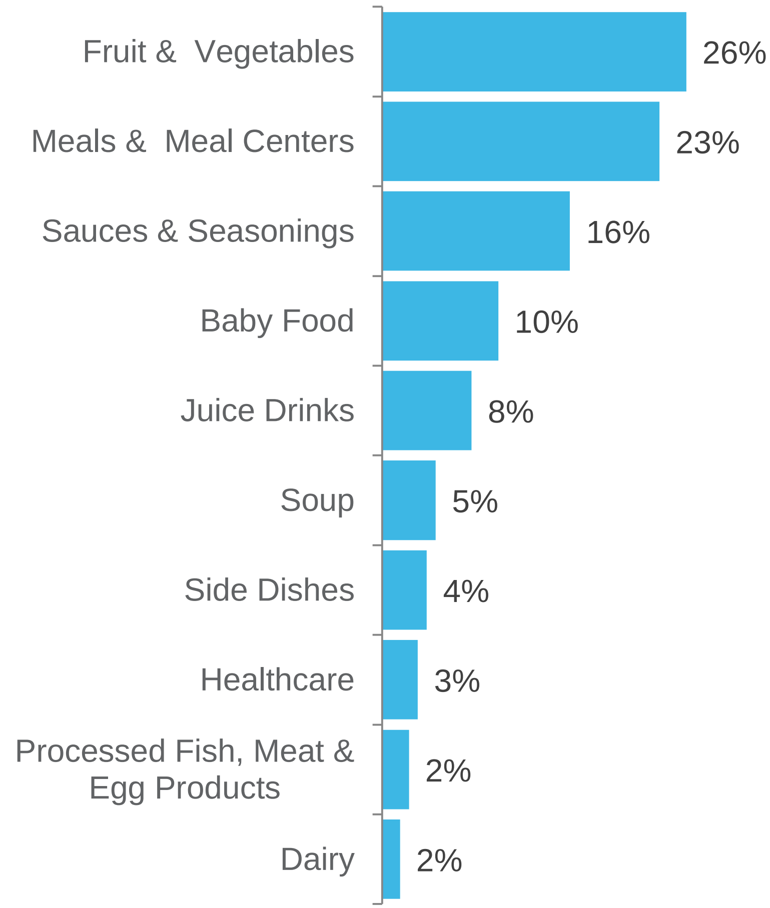
- The three key countries for cauliflower launches and innovation were[75] USA, Japan and Germany.
- Products containing cauliflower were launched across multiple categories including fruit and vegetables, meals and sauces.

Top Launch Countries



133 Global Launches

Top Launch Categories



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Cauliflower Launches
Top Claims & Pack Formats Used

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

Pack Formats Used

Global	Flexible	31%
Global	Jar	14%
Global	Tray	14%
Europe	Flexible	37%
Europe	Tray	29%
Europe	Carton	10%
Asia Pacific	Carton	25%
Asia Pacific	Flexible sachet	22%
Asia Pacific	Flexible	19%

Top Claims Used

Global	Microwaveable	44%
Global	No Additives/Preservatives	28%
Global	Ethical - Environmentally Friendly Package	23%
Europe	Microwaveable	48%
Europe	Vegetarian	37%
Europe	Ethical - Environmentally Friendly Package	25%
Asia Pacific	Microwaveable	47%
Asia Pacific	No Additives/Preservatives	41%
Asia Pacific	Babies & Toddlers (0-4)	25%

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

Innovative Cauliflower Launches:
L3M (March – June 2016)

Ready Pac Foods Sriracha Ranch Chopped Complete Salad Kit (USA)

Ready Pac Foods Sriracha Ranch Chopped Complete Salad Kit contains crisp romaine, green cabbage, crunchy celery, sweet carrots, tangy red cabbage, broccoli, radishes, cauliflower, mini chow mein strips, savory bacon crumbles, and sriracha ranch dressing. The thoroughly washed product retails in a 13-oz. pack including 10.8-oz. of salad and toppings and 2.2-oz. of dressing.

Claims:
Ease of Use

Cooked by Bio Vegan Organic Bulgur Risotto with Coral Lentils & Baby Vegetables (France)

Cooked by Bio Vegan Risotto de Boulgour Lentilles Corail aux Petits Légumes (Organic Bulgur Risotto with Red Lentils & Baby Vegetables) is now available. This vegan and ready to cook product provides 96 calories per 100g and is ready in two minutes in the microwave or in seven minutes with water in bain-marie. It retails in a 300g partly recyclable pack which serves one, bearing the AB organic, the Ecocert and the EU Green Leaf logos.

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

Freshmark Broccoli & Cauliflower Soup Mix (South Africa)

Freshmark Broccoli & Cauliflower Soup Mix is suggested to be served with croutons, crusty bread or crumbled blue cheese. The product retails in a 600g pack, featuring cooking instructions.

Claims:
N/A

Naked Kitchen Indian Spiced Cauliflower Kedgeree with White Quinoa and Turmeric (New Zealand)

Naked Kitchen Indian Spiced Cauliflower Kedgeree with White Quinoa and Turmeric is now available. This vegetarian product is made using the freshest premium natural ingredients without using preservatives, artificial colours and flavours and is free of gluten. It can be cooked in the conventional oven or in the microwave and retails in a 500g pack, bearing the Facebook logo. The manufacturer claims to support Oxfam and the sustainable farming.

Claims:
No Additives/Preservatives, Microwaveable, Vegetarian, Premium, Gluten-Free, Low/No/Reduced Allergen, Ethical - Charity, Social Media

Source: Mintel (2016)

Innovative Cauliflower Launches:
L3M (March – June 2016)

Mann's Nourish Bowls Southwest Chipotle (USA)

Mann's Nourish Bowls Southwest Chipotle is described as a delicious warm meal with fresh veggies, beans and salsa. The product contains 220 calories per bowl and comprises cauliflower, kale, kohlrabi, sweet potatoes, black bean with chipotle corn salsa and shredded cheddar cheese. It can be prepared in three minutes in the microwave and retails in a 10.5-oz. pack. The manufacturer claims to be a women owned business.

Claims:
Microwaveable

Pulmuone Baby & Kids Beef, Cauliflower and Oyster Mushroom Porridge (South Korea)

Pulmuone Baby & Kids Beef, Cauliflower and Oyster Mushroom Porridge is claimed to be nutritiously well balanced, develop the baby's healthy taste buds, and support a healthy intestine. This microwaveable product is suitable for babies between 11 to 13 months, and retails in a 160g pack.

Claims:
Other (Functional), Microwaveable, Babies & Toddlers (0-4), Digestive (Functional)

Morrisons on the Side Cauliflower Cheese (UK)

Morrisons on the Side Cauliflower Cheese is now available with a new and improved formula. The product comprises cauliflower florets in a rich mature cheddar cheese sauce. The vegetarian product is suitable for home freezing and microwave cooking, and it retails in a 450g partially recyclable pack.

Claims:
Microwaveable, Vegetarian, Ethical - Environmentally Friendly Package

Amy's Meals for Two Broccoli Cauliflower Pasta in Cheddar Cheese Sauce (USA)

Amy's Meals for Two Broccoli Cauliflower Pasta in Cheddar Cheese Sauce is now available. This microwaveable product is made with organic wheat pasta in creamy aged English cheddar sauce, crisp, organic broccoli and cauliflower florets for flavor and crunch, and all dairy ingredients are made with pasteurized, rBST-hormone-free milk. It contains no GMO or preservatives, can be prepared in skillet in 10 minutes and retails in an 18-oz. pack.

Claims:
No Additives/Preservatives, Microwaveable, Organic, Hormone Free, GMO-Free

Source: Mintel (2016)

Innovative Cauliflower Launches:
L3M (March – June 2016)

Heston From Waitrose Cauliflower Macaroni Cheese with Truffle Flavoured Oil (UK)

Heston From Waitrose Cauliflower Macaroni Cheese with Truffle Flavoured Oil has been repackaged. This vegetarian product is described as a cooked free range eggs macaroni pasta coated in truffle flavoured olive oil and truffle paste with a rich cheese sauce, cauliflower florets and topped with an extra mature Cheddar cheese, parsley and ciabatta crumb.

Claims:

Vegetarian, Ethical - Environmentally Friendly Package, Ethical - Animal

Woolworths Food Cauliflower, Broccoli & Kale Rice (South Africa)

Woolworths Food Cauliflower, Broccoli & Kale Rice is now available. The product is chopped for convenience, washed and ready to cook and can be microwaved for three to five minutes. It retails in a 400g pack.

Claims:

Microwaveable, Ease of Use

Trader Joe's Spicy Pickled Vegetables (USA)

Trader Joe's Spicy Pickled Vegetables areTrader Joe's version of traditional Mexican Jalapeños en Escabeche with the twist of carrots, onion, cauliflower and jicama. This kosher certified product retails in a 20-oz. pack.

Claims:

Kosher

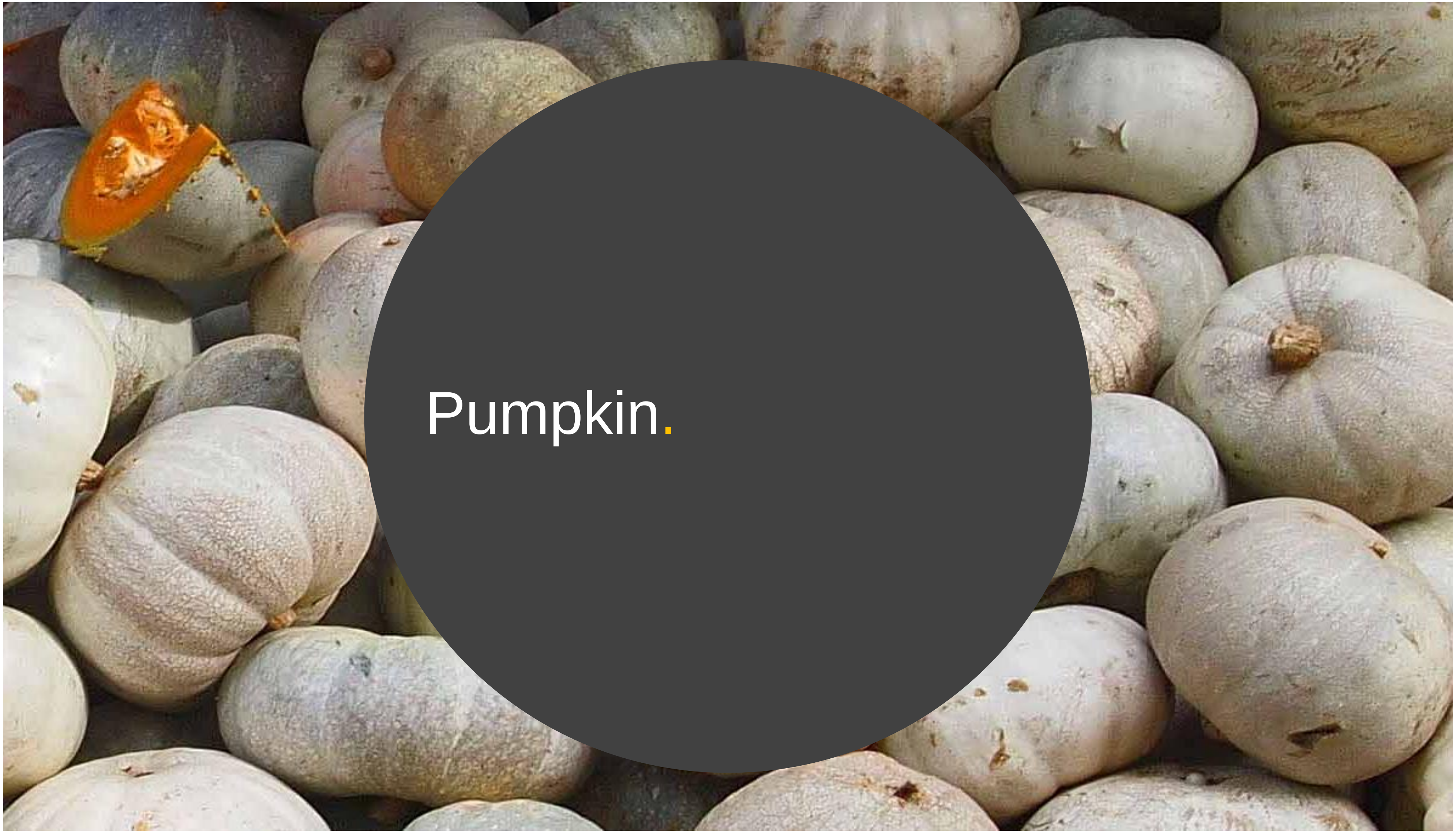
Trader Ming's Kung Pao Tempura Cauliflower (USA)

Trader Ming's Kung Pao Tempura Cauliflower comprises large cauliflower florets enrobed in a light tempura batter that bake up crispy on the outside, and tender on the inside. The product comes with a microwaveable spicy kung pao sauce and can be served as an appetizer, a starter, or a vegetarian side dish. It retails in a 24-oz. pack.

Claims:

Microwaveable, Vegetarian

Source: Mintel (2016)



Pumpkin.

Both purchase and consumption of pumpkins have slightly increased this wave.

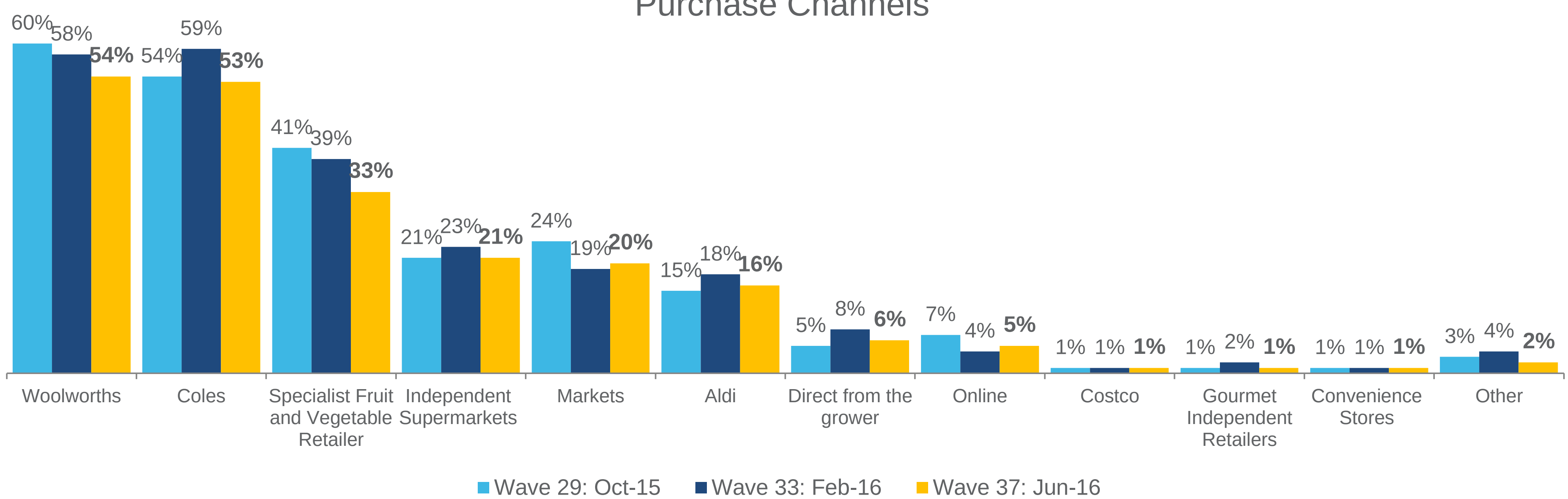
Pumpkin is generally purchased from mainstream retailers. This wave continues a decline in purchase from specialist retailers.

Average Purchase **3.2** times per month

▼ 3.0 times, Wave 29
▼ 3.1 times, Wave 33

Average Consumption **9.1** times per month

▼ 8.1 times, Wave 29
▼ 8.8 times, Wave 33



Q1. On average, how often do you purchase pumpkin?
Q2. On average, how often do you consume pumpkin?
Q5. From which of the following channels do you typically purchase pumpkin?
Sample Wave 29 N=305, Wave 33 N=304, Wave 37 N=302

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

Average Spend and Price Sensitivity

Average weight of purchase

The average consumer typically purchases **1.3kg** of pumpkin, consistent with the previous wave.

▼ 1.2kg, Wave 29
— 1.3kg, Wave 33

Recalled last spend

Recalled last spend on pumpkin is **$3.20**, remaining stable from the past wave.

▲ $3.30, Wave 29
— $3.20, Wave 33

Value for money

Consumers perceived pumpkin as good value for money **(7.0/10)**, which has increased this wave.

▼ 6.6/10, Wave 29
▼ 6.6/10, Wave 33

Q3. How much pumpkin do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 29 N=305, Wave 33 N=304, Wave 37 N=302

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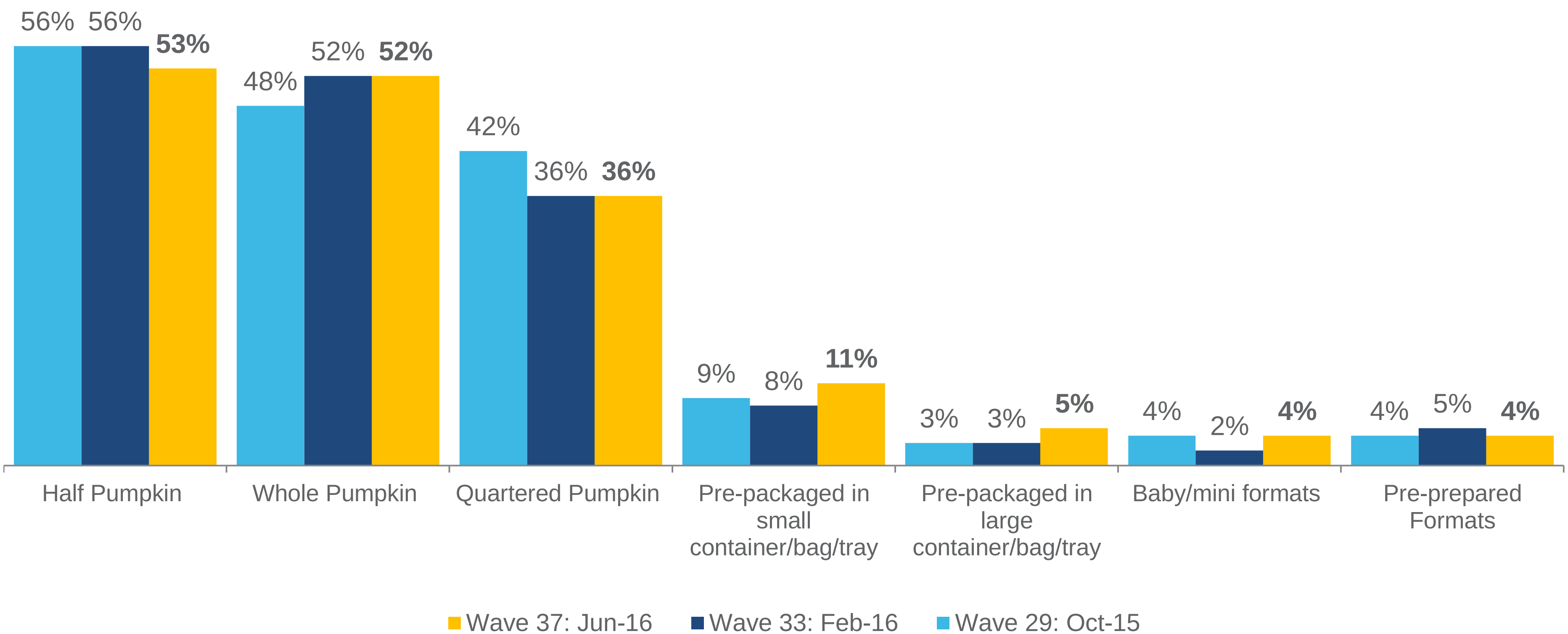
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

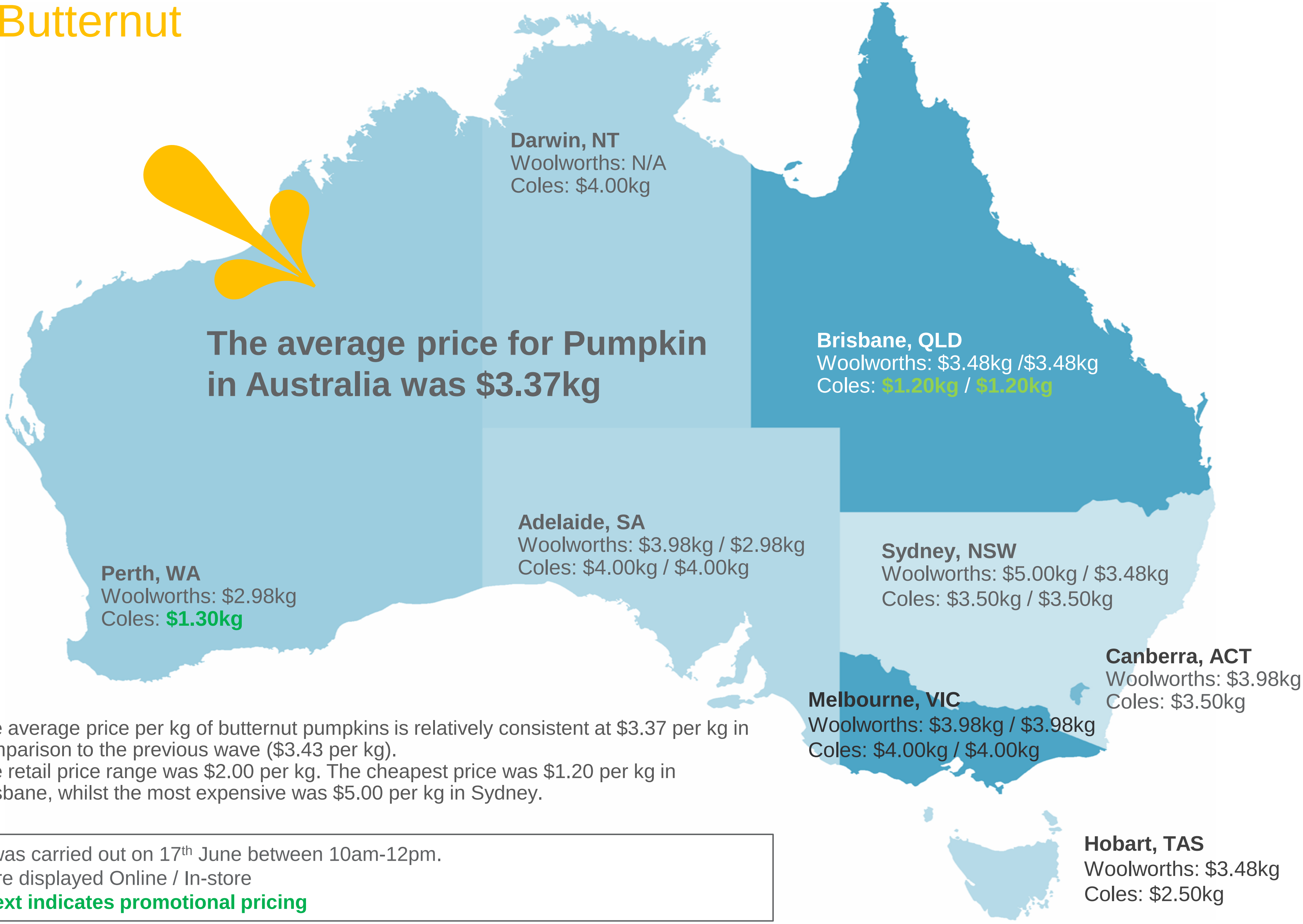
Half and whole pumpkins are the most commonly purchased format. Quartered pumpkins are also popular, with pre-packaged formats only making up a small proportion of purchases.



Q4b. In what fresh formats do you typically purchase Pumpkin?
Sample Wave 29 N=305, Wave 33 N=304, Wave 37 N=302

Online and In-store Commodity Prices

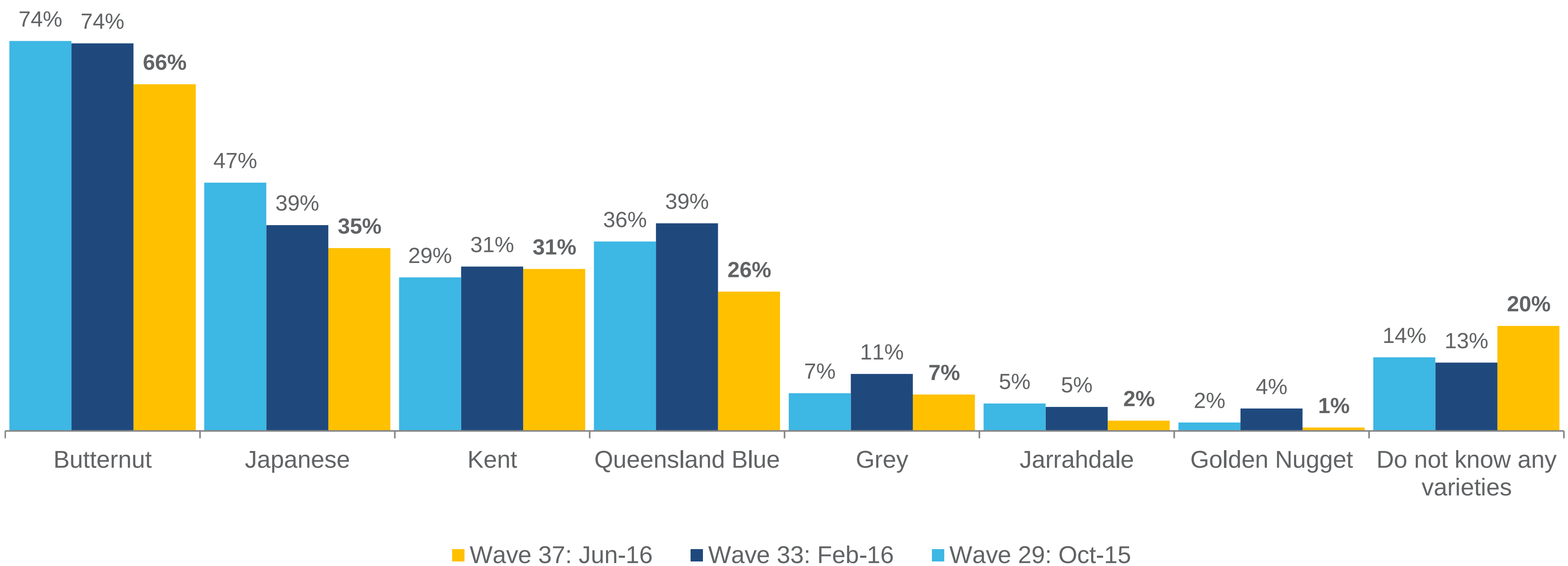
Butternut



- The average price per kg of butternut pumpkins is relatively consistent at $3.37 per kg in comparison to the previous wave ($3.43 per kg).
- The retail price range was $2.00 per kg. The cheapest price was $1.20 per kg in Brisbane, whilst the most expensive was $5.00 per kg in Sydney.

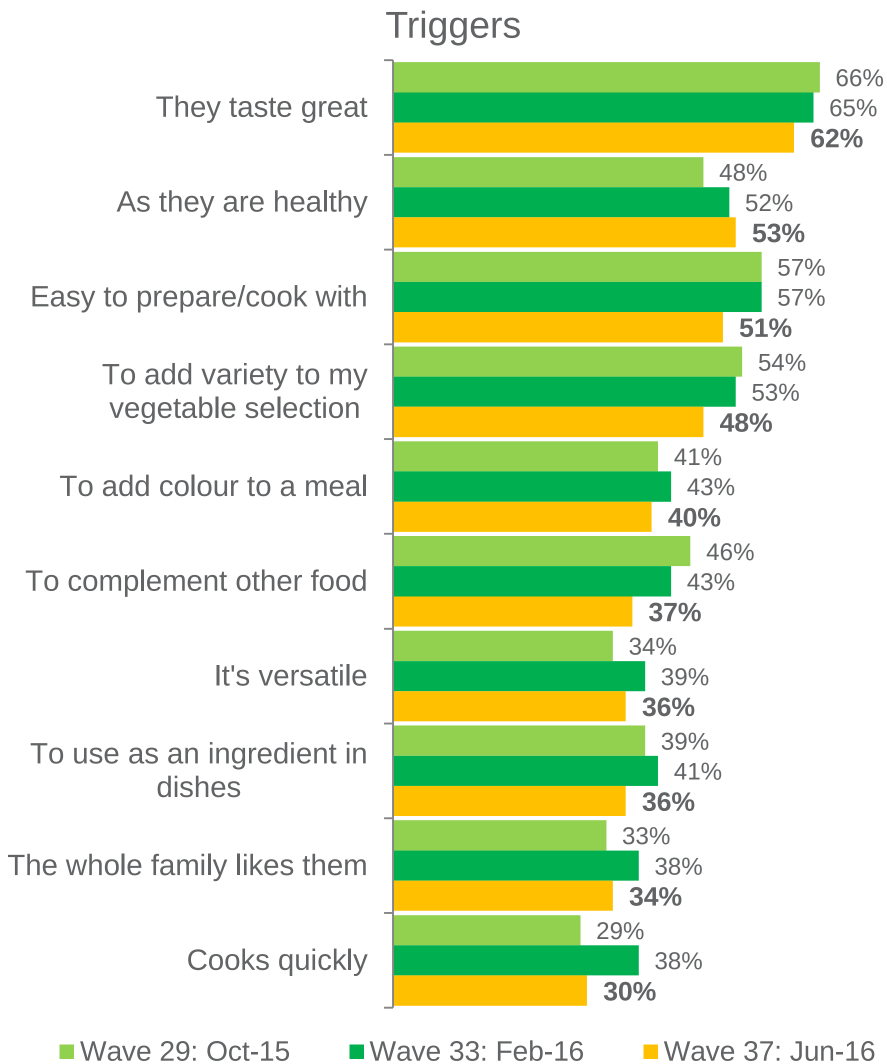
Pricing was carried out on 17th June between 10am-12pm.
Prices are displayed Online / In-store
Green text indicates promotional pricing

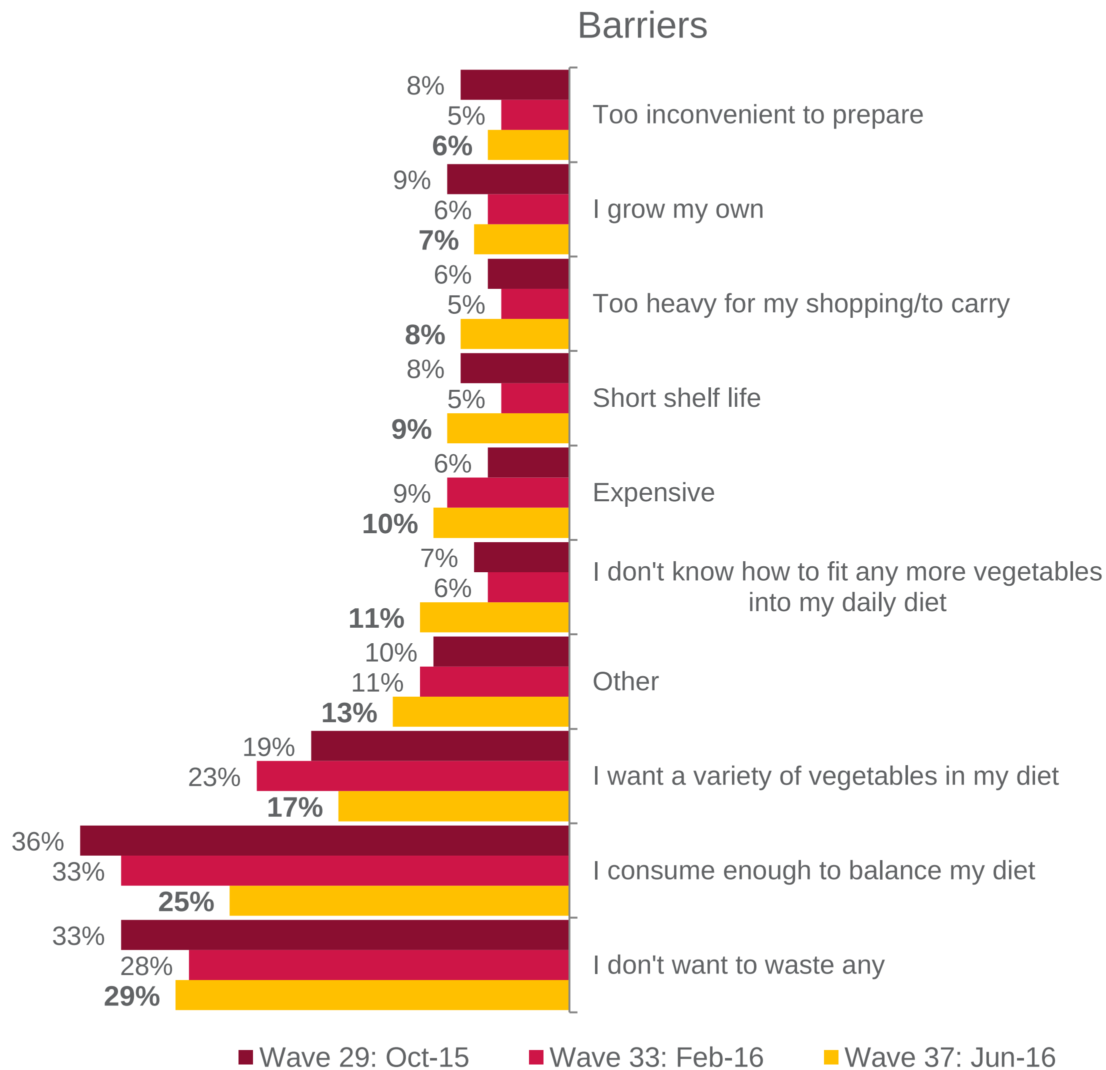
Consistent with past waves, spontaneous awareness of pumpkin types remains high. Butternut, Japanese and Kent varieties have the highest level of recall.



Q6a. What varieties of pumpkin are you aware of? (unprompted)
Sample Wave 29 N=305, Wave 33 N=304, Wave 37 N=302

Taste and health are the key drivers of pumpkin purchase. Not wanting to waste any and already consuming enough for their needs are the main barriers to purchase.





Q7. Which of the following reasons best describes why you purchase pumpkin?
Q8. Which reason best describes why you don't buy pumpkin more often?
Sample Wave 29 N=305, Wave 33 N=304, Wave 37 N=302

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

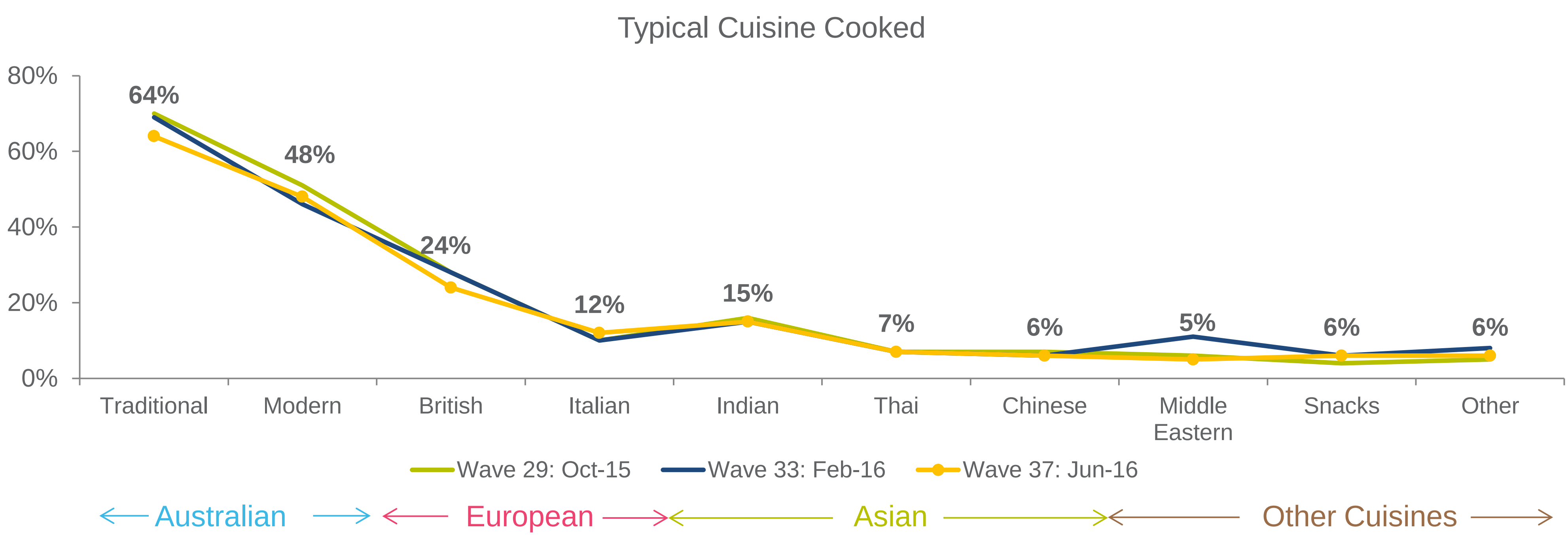
Meal occasions generally occur at dinner time and for family meals.

Top 5 Consumption Occasions

	Wave 33	Wave 37
Dinner	80%	**75%**
Family meals	73%	**63%**
Weekday meals	51%	**44%**
Weekend meals	50%	**40%**
Quick Meals	23%	**22%**

16% used pumpkin when cooking a new recipe

▲ 17%, Wave 33



Q10. What cuisines do you cook/consume that use pumpkin?
Q11. Which of the following occasions do you typically consume/use pumpkin?
Sample Wave 29 N=305, Wave 33 N=304, Wave 37 N=302

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

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

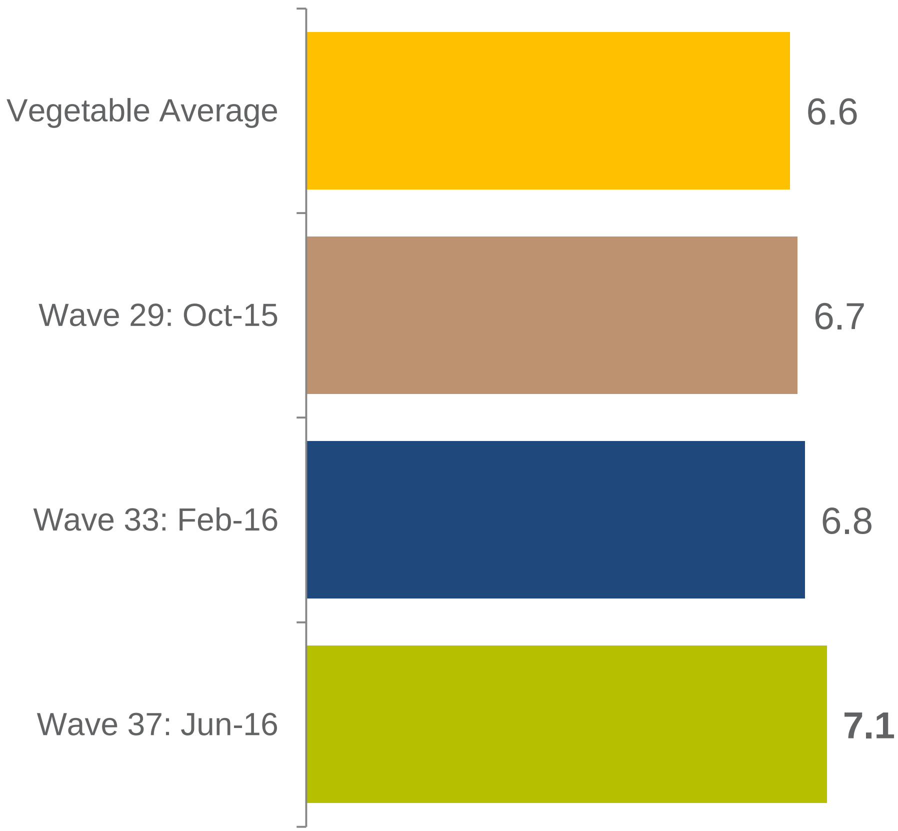
Accompanying Vegetables

- Potato 71%
- Carrot 57%
- Broccoli 41%
- Sweet Potato 38%
- Onion 36%

Top 10 Cooking Styles			
	Wave 29	Wave 33	Wave 37
Roasting	75%	77%	**69%**
Soup	55%	54%	**52%**
Mashing	50%	52%	**47%**
Baking	44%	46%	**42%**
Boiling	36%	38%	**37%**
Steaming	37%	38%	**31%**
Slow Cooking	18%	19%	**17%**
Microwave	16%	14%	**13%**
Frying	9%	9%	**13%**
Stir frying	10%	10%	**10%**

Q9. How do you typically cook pumpkin?
Q10a. And when are you serving pumpkin which of the following do you also serve together with this?
Sample Wave 29 N=305, Wave 33 N=304, Wave 37 N=302

Pumpkin provenance has marginally increased over the last three wave. Knowing their pumpkins are Australian grown remains the most important provenance information.



8.2

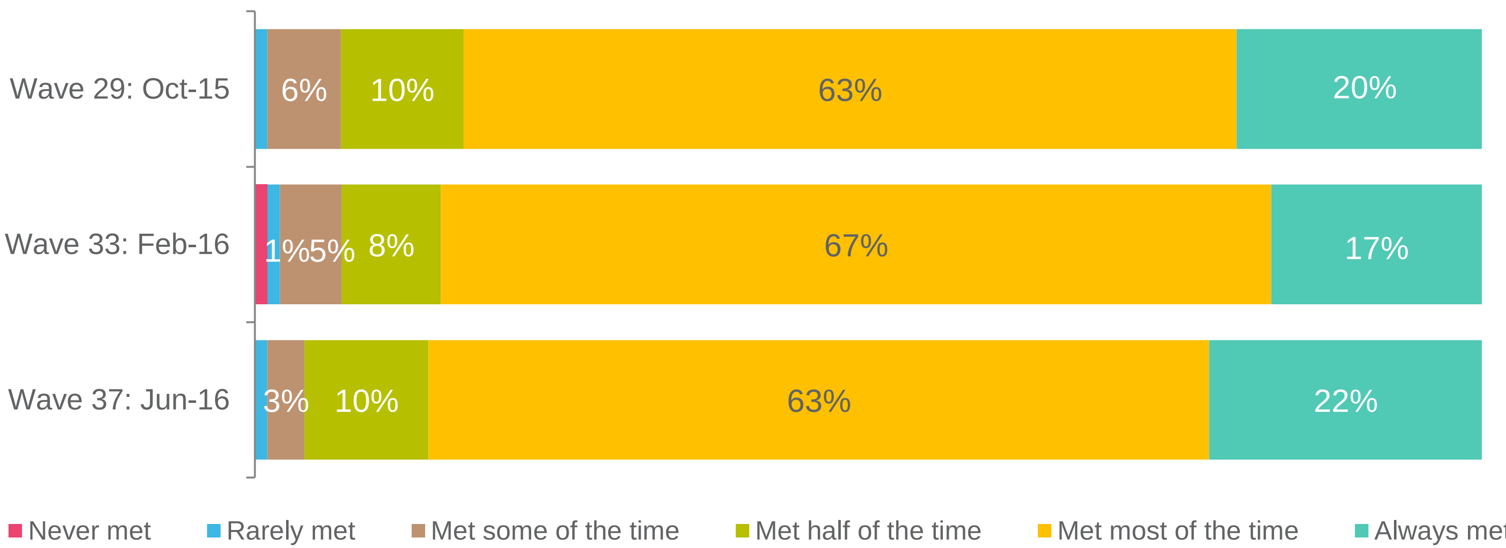
Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 29 N=305, Wave 33 N=304, Wave 37 N=302

Pumpkins are expected to stay fresh for 12 days once purchased. Freshness expectations of pumpkin always being met have increased this wave.

Expected to stay fresh for **12.5** days

▼ 11.5 days, Wave 29
▼ 11.9 days, Wave 33

Expectations Met



Q12. How long do you expect pumpkin to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy pumpkin?
Sample Wave 29 N=305, Wave 33 N=304, Wave 37 N=302

Horticulture Innovation Australia

colmar brunton.

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

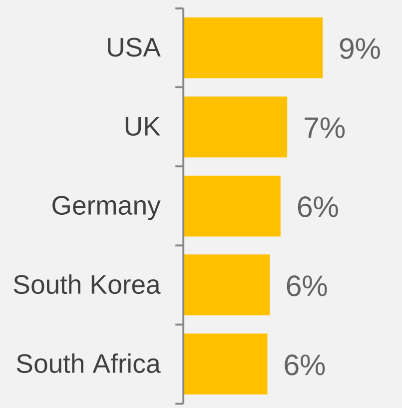
Pumpkin Product Launch Trends.

Pumpkin Global NPDs

March – June 2016

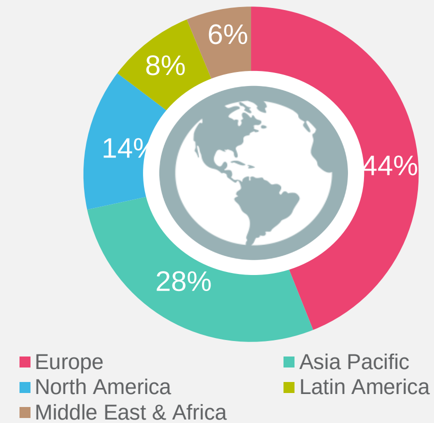
There were 687 products launched in the past three months that contained pumpkin, which is lower than the previous wave (839). Europe and Asia Pacific were the main regions for launches, while USA was the key country. Flexible packaging remained the most common format. Launches were predominately in snack and breakfast cereal categories.

Country

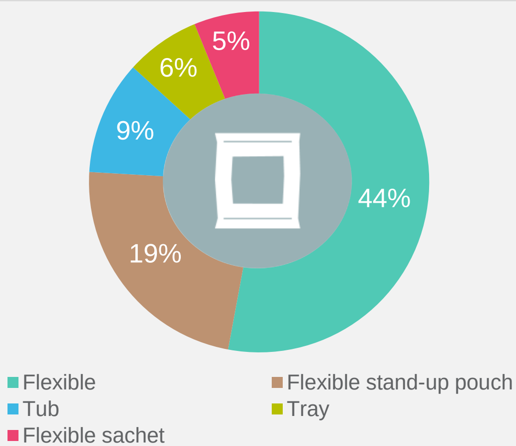


687 Global NPDs

Region



Top Pack Formats



Categories

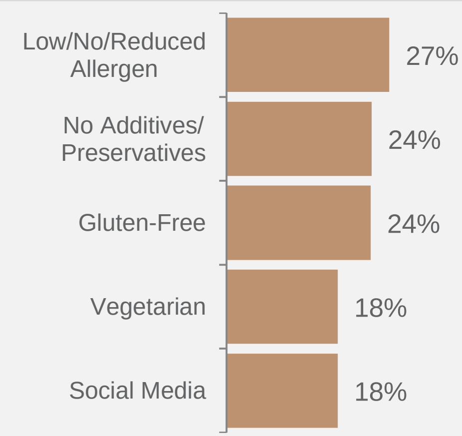
Snacks 27%

Breakfast Cereals 15%

Bakery 10%

Meals 6%

Top Claims



Pumpkin Product Launches:
Last 3 Months (March – June 2016)
Summary

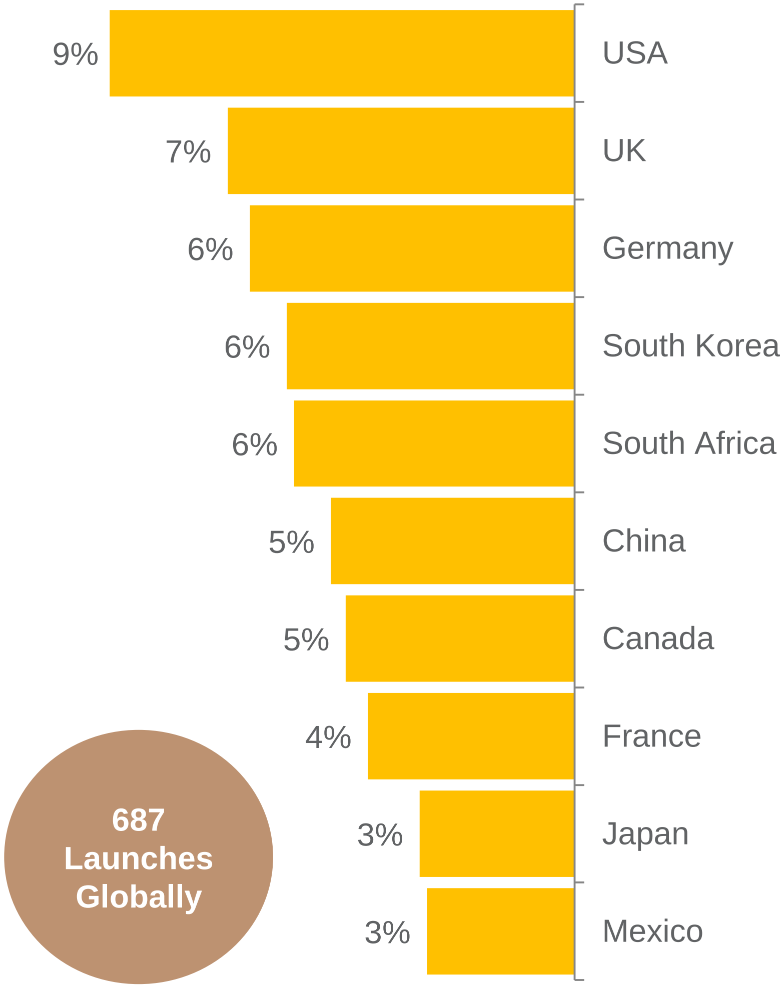
- A total of 687 products containing pumpkin as an ingredient were launched globally in the last 3 months, lower than the previous quarter (839 launches).
- There were 9 pumpkin launches in Australia this quarter.
- Europe (44%) and Asia Pacific (28%) were the top regions for launches. Key countries for innovation were USA (9%), UK (7%) and Germany (6%).
- Flexible packaging continues to be the widely used format for launches (44%).
- Top categories for product launches were snacks (27%), breakfast cereals (15%) and bakery goods (10%).
- Core claims for product launches globally were based around health e.g. low allergen (27%), no additives/preservatives (24%) and gluten-free (24%).
- The most innovative product was a cold pressed pumpkin seed oil from Poland. See following pages for examples of product launches.

Source: Mintel (2016)

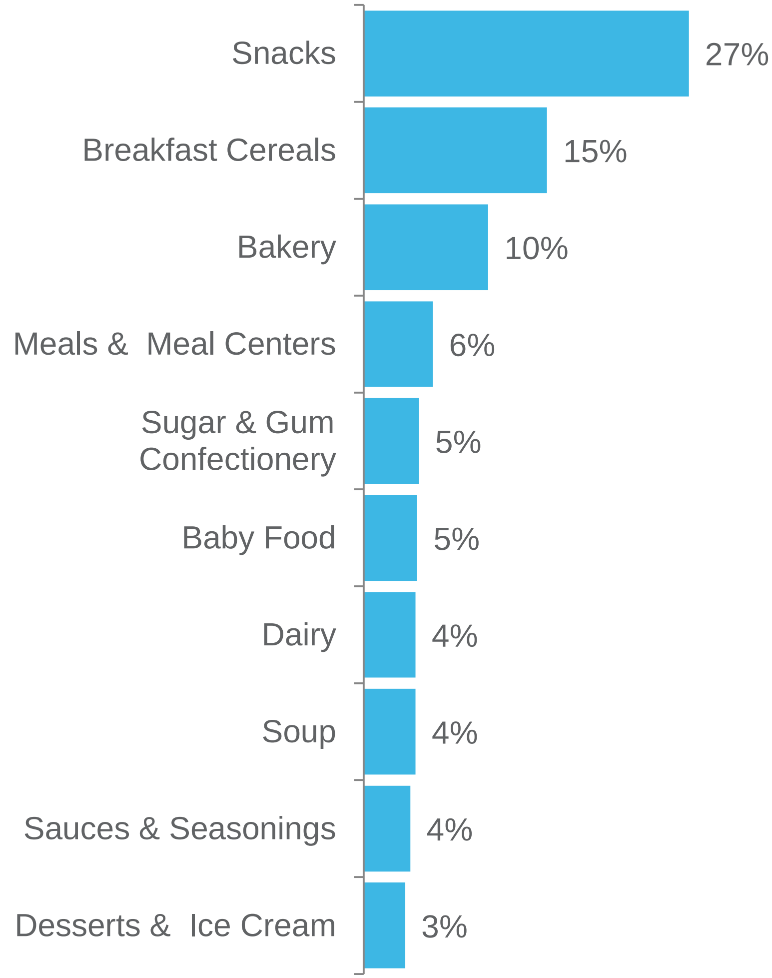
Pumpkin Launches
Country & Categories

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

Top Launch Countries



Top Launch Categories



Pumpkin Launches
Top Claims & Pack Formats Used

- Flexible packaging was the predominant format type for products launched in the last three months.
- Health claims were most commonly used globally, with allergen free, no additives/preservatives and gluten-free the most common claims.

Pack Formats Used

Global	Flexible	44%
Global	Flexible stand-up pouch	19%
Global	Tub	9%
Europe	Flexible	50%
Europe	Tub	14%
Europe	Tray	7%
Asia Pacific	Flexible	43%
Asia Pacific	Flexible stand-up pouch	22%
Asia Pacific	Flexible sachet	12%

Top Claims Used

Global	Low/No/Reduced Allergen	27%
Global	No Additives/Preservatives	24%
Global	Gluten-Free	24%
Europe	Vegetarian	26%
Europe	Low/No/Reduced Allergen	24%
Europe	Organic	21%
Asia Pacific	No Additives/Preservatives	39%
Asia Pacific	Social Media	17%
Asia Pacific	Vegetarian	14%

Only regions with n >30 are displayed

Innovative Pumpkin Launches:
L3M (March – June 2016)

Krusteaz Pumpkin Pie Bar Supreme Mix (Mexico)

Krusteaz Pay de Calabaza (Pumpkin Pie Bar Supreme Mix) is now available. The kosher product is made with gingerbread crust and retails in a 489g pack made from 100% recycled paperboard.

Claims:
Kosher, Ethical - Environmentally Friendly Package

Mamion Yuginong Ssari Joa Organic Sweet Pumpkin Rice Snack (South Korea)

Mamion Yuginong Ssari Joa Organic Sweet Pumpkin Rice Snack is made of 98% organic rice and 2% sweet pumpkin. It is said to gently melt in mouth, and is suitable for baby over six month. It retails in a 25g resealable pack.

Claims:
Organic, Babies & Toddlers (0-4), Convenient Packaging

Babience Bareunipmat Chicken Breast & Green Pumpkin Rice Porridge (South Korea)

Babience Bareunipmat Chicken Breast & Green Pumpkin Rice Porridge has been added to the range. It is made with stock, brewed with Korean beef, jujube and radish, Icheon rice, Korean vegetables, chicken breast and green pumpkin, and these are specialty of each area and directly purchased from the producer.

Claims:
Babies & Toddlers (0-4), Digestive (Functional), Bone Health

Casale Paradiso Pumpkin Risotto (Italy)

Casale Paradiso Risotto alla Zucca (Pumpkin Risotto) is made with carnaroli rice which is said to be the best for risotto. This gluten-free product is low in fat, free from salt and suitable fro vegetarian. It cooks in 16 minutes and retails in a 300g pack enough for four servings.

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

Source: Mintel (2016)

Innovative Pumpkin Launches:
L3M (March – June 2016)

Baby Best Pumpkin Baby Noodles (Taiwan)

Baby Best Pumpkin Baby Noodles are suitable for babies aged nine months and older. The product is ready to cook, and free from preservatives, artificial colouring and flavours. It retails in a 200g pack featuring the Facebook logo.

Claims:
No Additives/Preservatives, Babies & Toddlers (0-4), Ease of Use, Social Media

Fithia Margarine with Cold Pressed Pumpkin Seed Oil (Poland)

Fithia Margaryna z Olejem z Pestek Dyni Tloczonym na Zimno (Margarine with Cold Pressed Pumpkin Seed Oil) is said to be a light bread spread, with a light pistachio colour that provides an unique taste, especially to sandwiches with cheese, curd, meat and vegetables or as addition to potato puree.

Claims:
No Additives/Preservatives, Antioxidant

Ricca Massa Artesanal Pumpkin Rondelli with Parmesan, Almond and Bechamel Sauce (Brazil)

Ricca Massa Artesanal Rondeli de Moranga com Parmesão, Lascas de Amêndoas e Bechamel (Pumpkin Rondelli with Parmesan, Almond and Bechamel Sauce) is described as an easy to cook and tasty meal. It can be prepared in a microwave oven, and contains no added colorants or preservatives. This handmade product retails in a 600g pack.

Claims:
No Additives/Preservatives, Microwaveable, Ease of Use

Watkins Imitation Pumpkin Spice Extract (USA)

Watkins Imitation Pumpkin Spice Extract has been awarded the gold medal for highest quality. The kosher certified product retails in a 2-fl. oz. pack featuring recipe ideas.

Claims:
Kosher

Source: Mintel (2016)

Innovative Pumpkin Launches:
L3M (March – June 2016)

May & Tao's Thai Yellow Curry Chicken with Pumpkin (China)

May & Tao's Tai Shi Huang Ka Li Ji Kuai Dun Nan Gua (Thai Yellow Curry Chicken with Pumpkin) can be prepared by pan or microwave. This product retails in a 300g pack.

Claims:
Microwaveable

Guangzhou Restaurant Likoufu / Likofu Chun Wu Gu Glutinous Rice Balls with Pumpkin Filling (China)

Guangzhou Restaurant Likoufu / Likofu Chun Wu Gu Nan Gua Tang Yuan (Glutinous Rice Balls with Pumpkin Filling) are free from preservatives and added colours. This product retails in a 320g pack containing 16 x 20g units.

Claims:
No Additives/Preservatives

Heavenly Organic Superfoods Pumpkin & Banana Yummy Wafer Wisps (Spain)

Heavenly Organic Superfoods Deliciosas Volutas de Barquillo Calabaza y Plátano (Pumpkin & Banana Yummy Wafer Wisps) are suitable for babies above six months of age and children, and are said to be perfect for teething. They contain organic fruits and vegetables blended together with ancient grains and are free from added sugar, salt, artificial colourants and flavours.

Claims:
No Additives/Preservatives, Low/No/Reduced Sugar, Organic, Low/No/Reduced Sodium, Babies & Toddlers (0-4), Bone Health, Social Media

L'Emile Saveurs Sans Gluten Organic Pumpkin Crispbreads (France)

L'Emile Saveurs Sans Gluten Tartines Bio Craquantes à la Courge (Organic Pumpkin Crispbreads) are now available. This gluten-free product is said to be crunchy, contains only 17 calories per crispbread and is a source of fibre. It is also said to be low in sugars and can be served for breakfast, as an apéritif with tapenade, as a bread substitute or as a snack for children.

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

Source: Mintel (2016)

Top Australian Pumpkin Launches:
L3M (March – June 2016)

Cucina Del Nonno Vegetarian Lasagna

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

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

Country Cup Cream of Pumpkin with Croutons Instant Soup

Country Cup Cream of Pumpkin with Croutons Instant Soup is 98% fat free and contains no artificial colours or added preservatives. This product retails in a recyclable and resealable 50g pack containing two portions.

Claims:
No Additives/Preservatives, Low/No/Reduced Fat, Ethical - Environmentally Friendly Package, Time/Speed, Convenient Packaging

The Real Skinny Soup Pumpkin & Sweet Potato Soup

The Real Skinny Soup Pumpkin & Sweet Potato Soup is a lightly seasoned soup of fresh pumpkin and sweet potato with a hint of spice. The product contains no artificial colours, can be heated in the microwave, and retails in a 300g pack with a twist and lock lid.

Claims:
No Additives/Preservatives, Microwaveable, Slimming

Fodmapped for You! Roasted Pumpkin Soup with a Hint of Sage

Fodmapped for You! Roasted Pumpkin Soup with a Hint of Sage has been relaunched, previously known as Sue Shepherd Roasted Pumpkin Soup. This product is free from onion, garlic, gluten, artificial colours, flavours, preservatives, MSG and 99% fat. The vegetarian certified microwavable soup is low in FODMAP, is a source of fibre and features a 3.5 health star rating. This product retails in a 500g pack that serves two and features the Facebook and Instagram logos.

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

Source: Mintel (2016)

Baby Broccoli.

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

Both purchase and consumption have remained relatively consistent with the previous wave.

Baby broccoli is typically purchased from mainstream retailers, with an upwards trend in purchase from Aldi, and a noticeable decrease in purchase from independent supermarkets this wave.

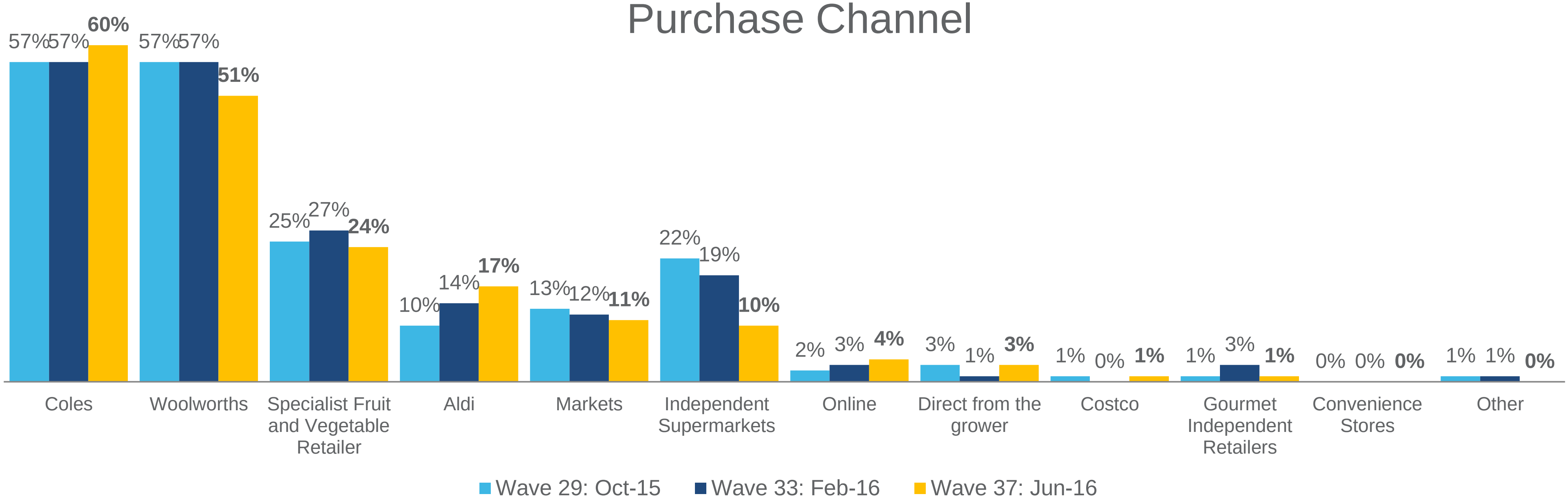
Average Purchase **3.3** times per month

3.4 times, Wave 29
3.4 times, Wave 33

Average Consumption **6.3** times per month

6.8 times, Wave 29
6.1 times, Wave 33

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 29 N=202, Wave 33 N=201, Wave 37 N=205

Average Spend and Price Sensitivity

Average weight of purchase

The average consumer typically purchases **0.5kg** of baby broccoli, consistent with previous waves.

— 0.5kg, Wave 29

— 0.5kg, Wave 33

Recalled last spend

The average recalled last spend is **$3.30** in June 2016, slightly lower than the previous waves.

▲ $3.60, Wave 29

▲ $3.40, Wave 33

Value for money

On average, consumers perceive baby broccoli to be moderate value for money **(6.2/10).**

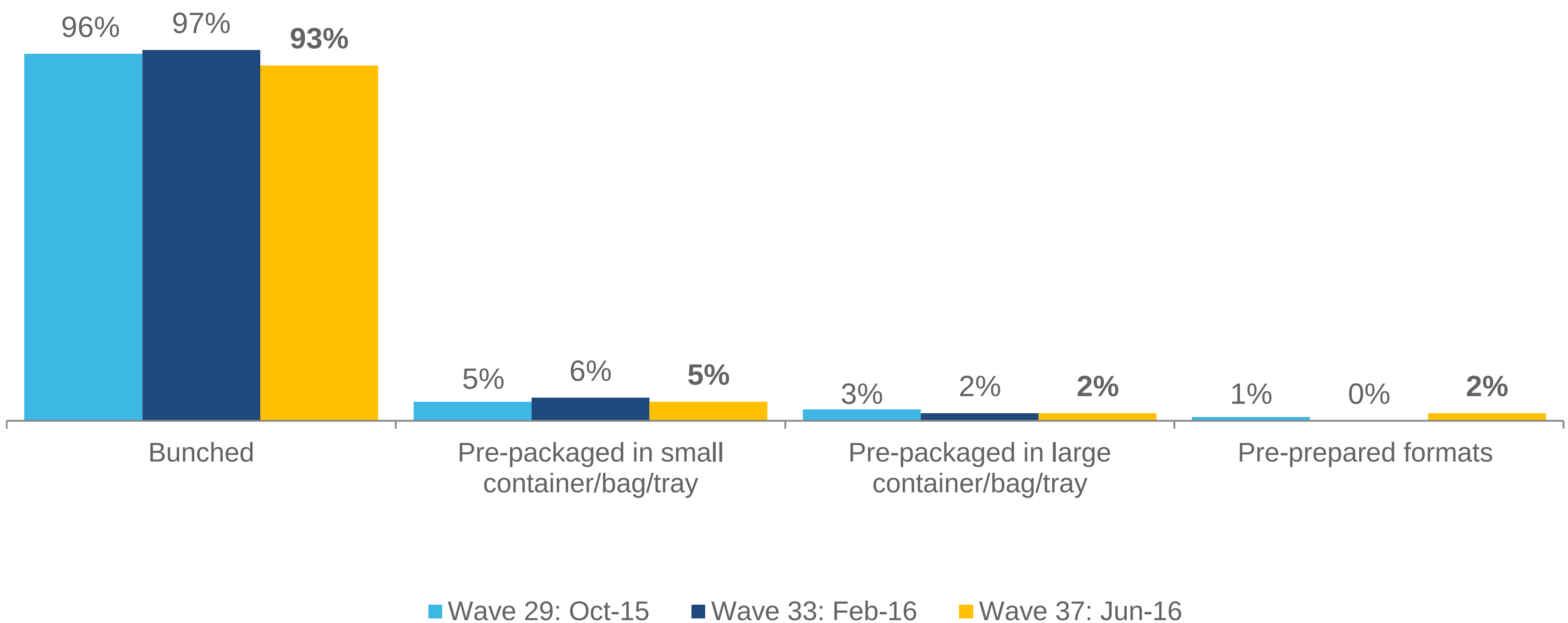
▼ 6.1/10, Wave 29

▼ 6.0/10, Wave 33

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 29 N=202, Wave 33 N=201, Wave 37 N=205

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

Bunched baby broccoli is the dominant format purchased by consumers, consistent with previous waves.

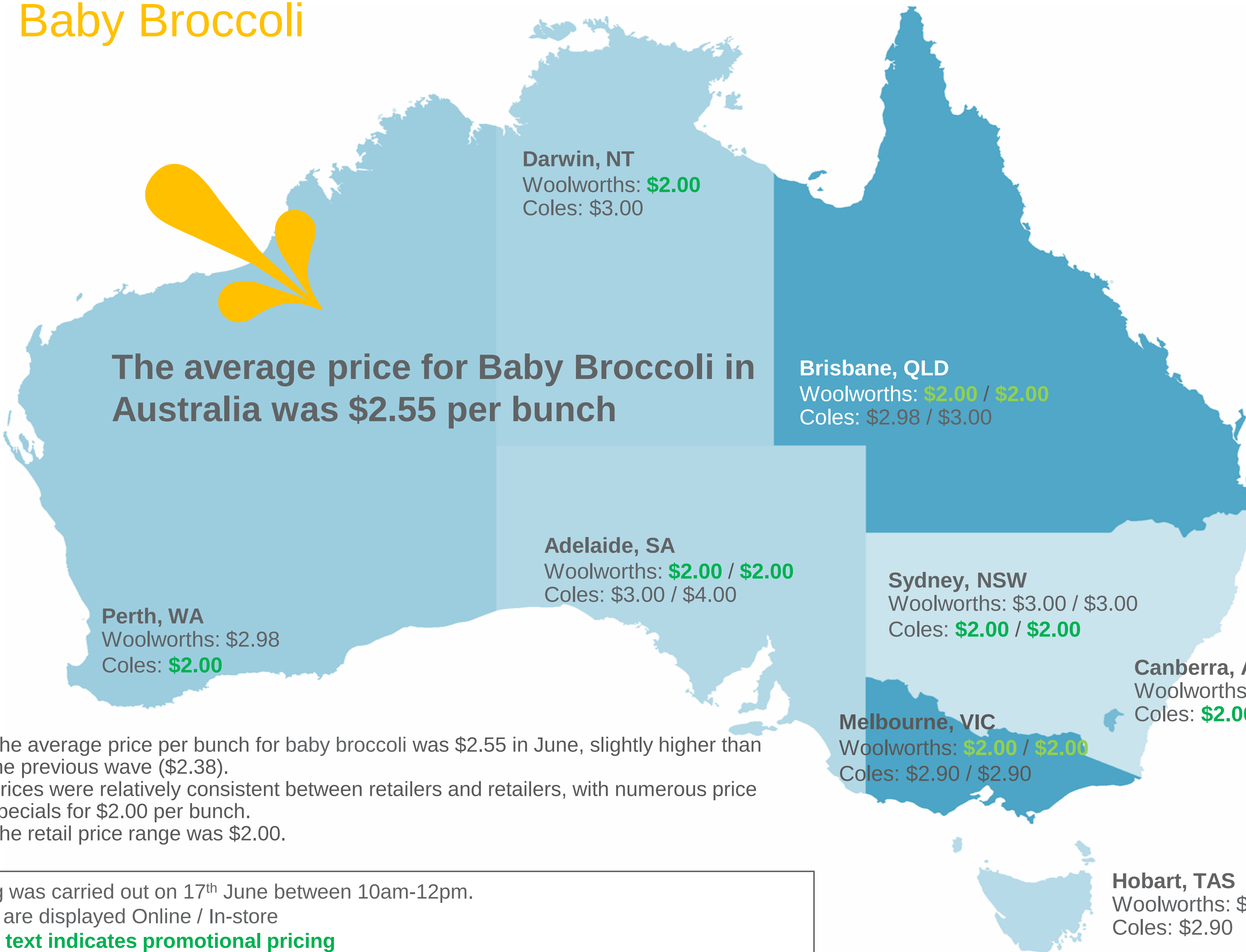


Q4b. In what fresh formats do you typically purchase <commodity>?
Sample Wave 29 N=202, Wave 33 N=201, Wave 37 N=205

Online and In-store Commodity Prices

Baby Broccoli

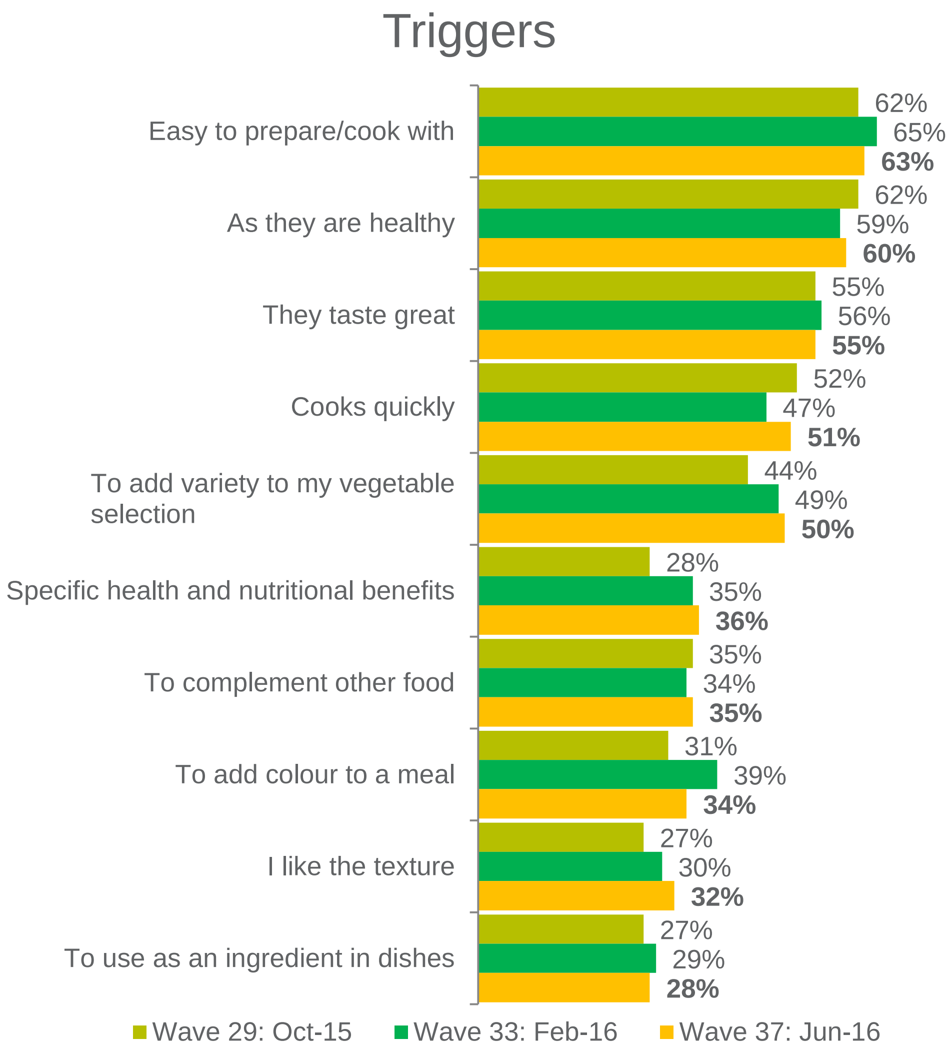
The average price for Baby Broccoli in Australia was $2.55 per bunch

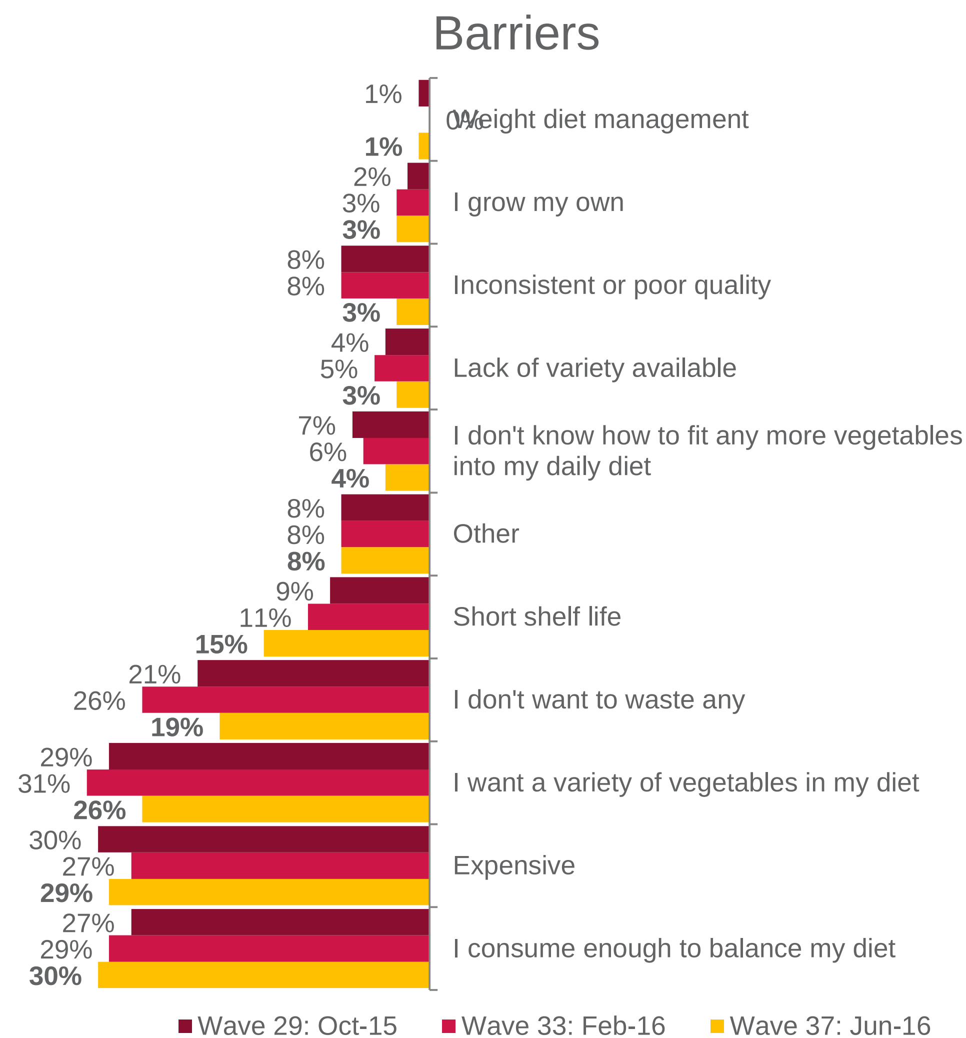


- The average price per bunch for baby broccoli was $2.55 in June, slightly higher than the previous wave ($2.38).
- Prices were relatively consistent between retailers and retailers, with numerous price specials for $2.00 per bunch.
- The retail price range was $2.00.

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

Ease of preparation and health remain the key drivers for baby broccoli purchase. Already consuming enough in their diet and price are the key barriers. Short shelf life has slowly increased as a barrier to purchase.





Q7. Which of the following reasons best describes why you purchase <commodity> ?
Q8. Which reason best describes why you don't buy <commodity> more often?
Sample Wave 29 N=202, Wave 33 N=201, Wave 37 N=205

Horticulture Innovation Australia colmar brunton.

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

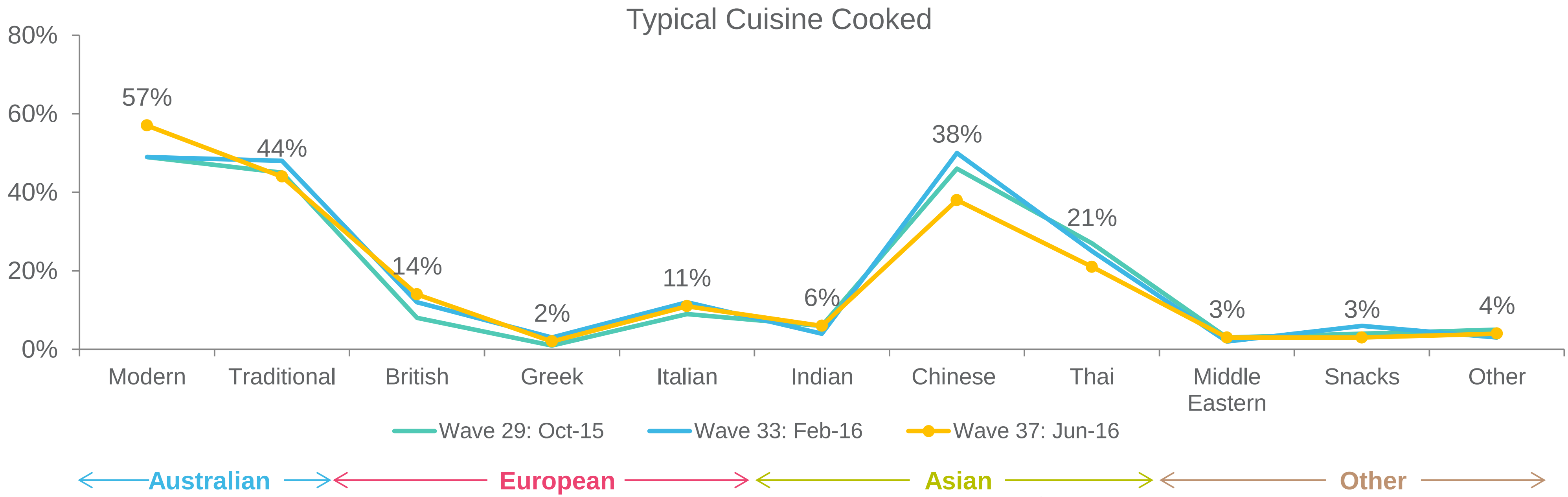
Key meal occasions are primarily centred around dinner and family meals.

Top 5 Consumption Occasions

	Wave 33	Wave 37
Dinner	76%	**68%**
Family meals	57%	**59%**
Weekday meals	43%	**36%**
Quick Meals	44%	**35%**
Weekend meals	31%	**31%**

10% used baby broccoli when cooking a new recipe

▲ 13%, Wave 33



Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?
Sample Wave 29 N=202, Wave 33 N=201, Wave 37 N=205

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

Consumers continue to serve baby broccoli with carrots and potatoes. There has been a significant increase in pumpkin as an accompanying vegetable this wave. Steaming and stir frying remain the primary cooking styles.

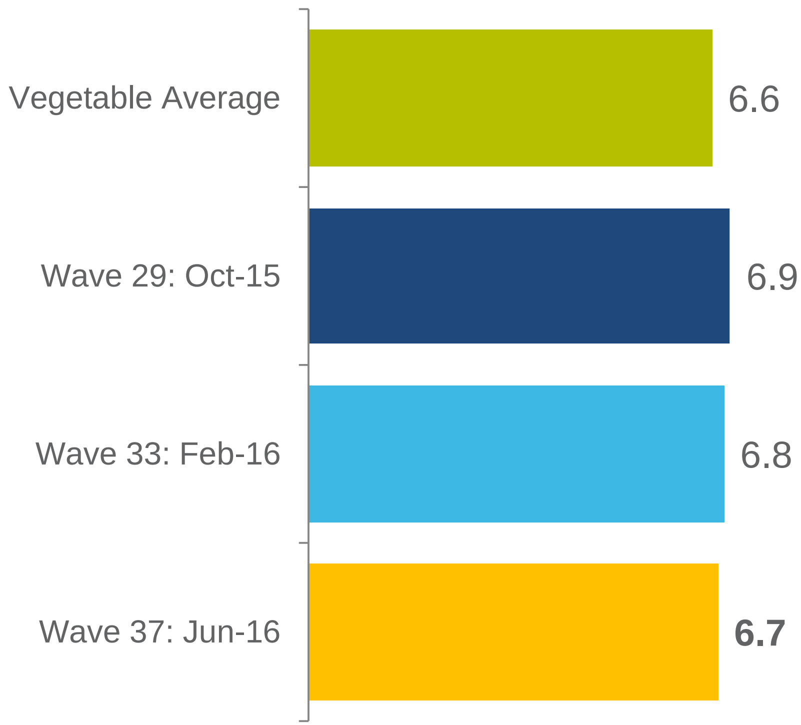
Accompanying Vegetables

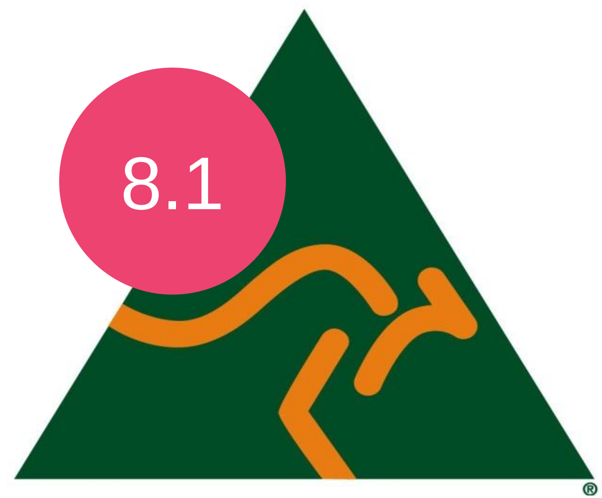
Carrot	62%
Potatoes	60%
Sweet Potato	30%
Pumpkin	28%
Beans	25%

Top 10 Cooking Styles			
	Wave 29	Wave 33	Wave 37
Steaming	62%	63%	**60%**
Stir frying	47%	54%	**44%**
Boiling	31%	27%	**27%**
Microwave	21%	29%	**25%**
Slow Cooking	4%	5%	**9%**
Roasting	4%	6%	**6%**
Frying	6%	6%	**6%**
Soup	4%	5%	**6%**
Sautéing	10%	14%	**6%**
Raw	9%	6%	**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 29 N=202, Wave 33 N=201, Wave 37 N=205

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





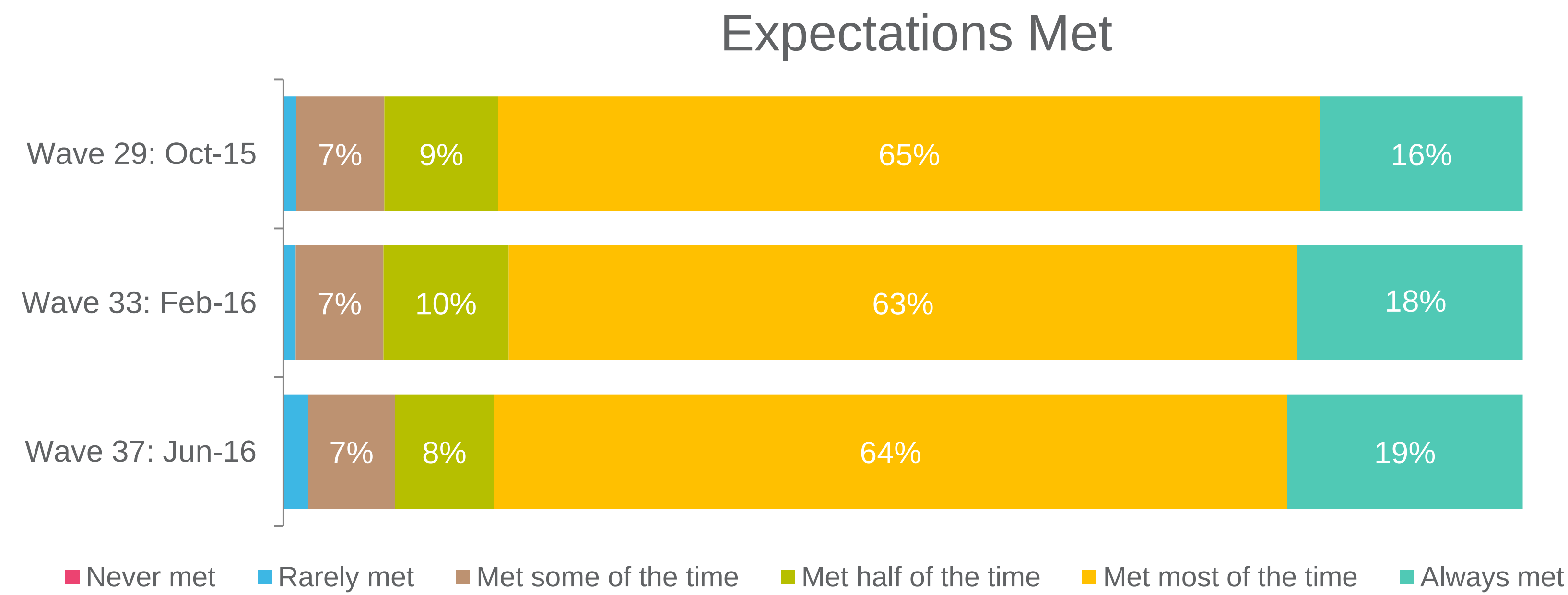
Q14. When purchasing Broccolini/Baby Broccoli, how important is Provenance to you?
(that is, knowing where the product is grown/where it comes from)
Q15. And when purchasing Broccolini/Baby Broccoli, how important is that it is grown in Australia?
Mean scores out of 10.
Sample Wave 29 N=202, Wave 33 N=201, Wave 37 N=205

Consumers expect baby broccoli to remain fresh for almost a week once purchased.

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

Expected to stay fresh for **6.5** days

▼ 6.3 days, Wave 29
▼ 6.1 days, Wave 33



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 29 N=202, Wave 33 N=201, Wave 37 N=205

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

Silverbeet.

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

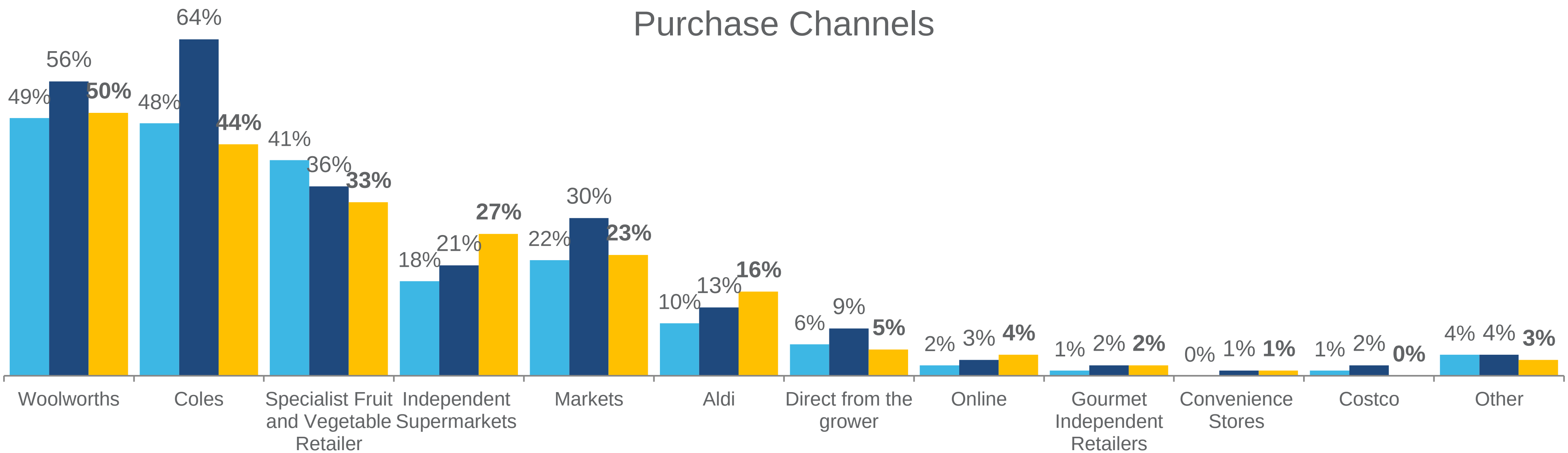
There has been a significant decline in purchase from Coles, returning to levels in Wave 29. Purchase from independent retailers and Aldi has continued to trend upwards.

Average Purchase **3.3** times per month

▼ 3.1 times, Wave 29
▲ 3.7 times, Wave 33

Average Consumption **6.2** times per month

▲ 6.8 times, Wave 29
▲ 6.7 times, Wave 33



Q1. On average, how often do you purchase silverbeet?
Q2. On average, how often do you consume silverbeet?
Q5. From which of the following channels do you typically purchase silverbeet?
Sample Wave 29 N=204, Wave 33 N=200, Wave 37 N=201

Horticulture Innovation Australia

colmar brunton.

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

Average Spend and Price Sensitivity

Average weight of purchase

The average consumer typically purchases **0.9kg** of silverbeet, slightly increasing from the previous waves.

- ▼ 0.8kg, Wave 29
- ▼ 0.8kg, Wave 33

Recalled last spend

Recalled last spend on silverbeet is **$3.30**, relatively consistent with the previous waves.

- ▲ $3.40, Wave 29
- ▲ $3.40, Wave 33

Value for money

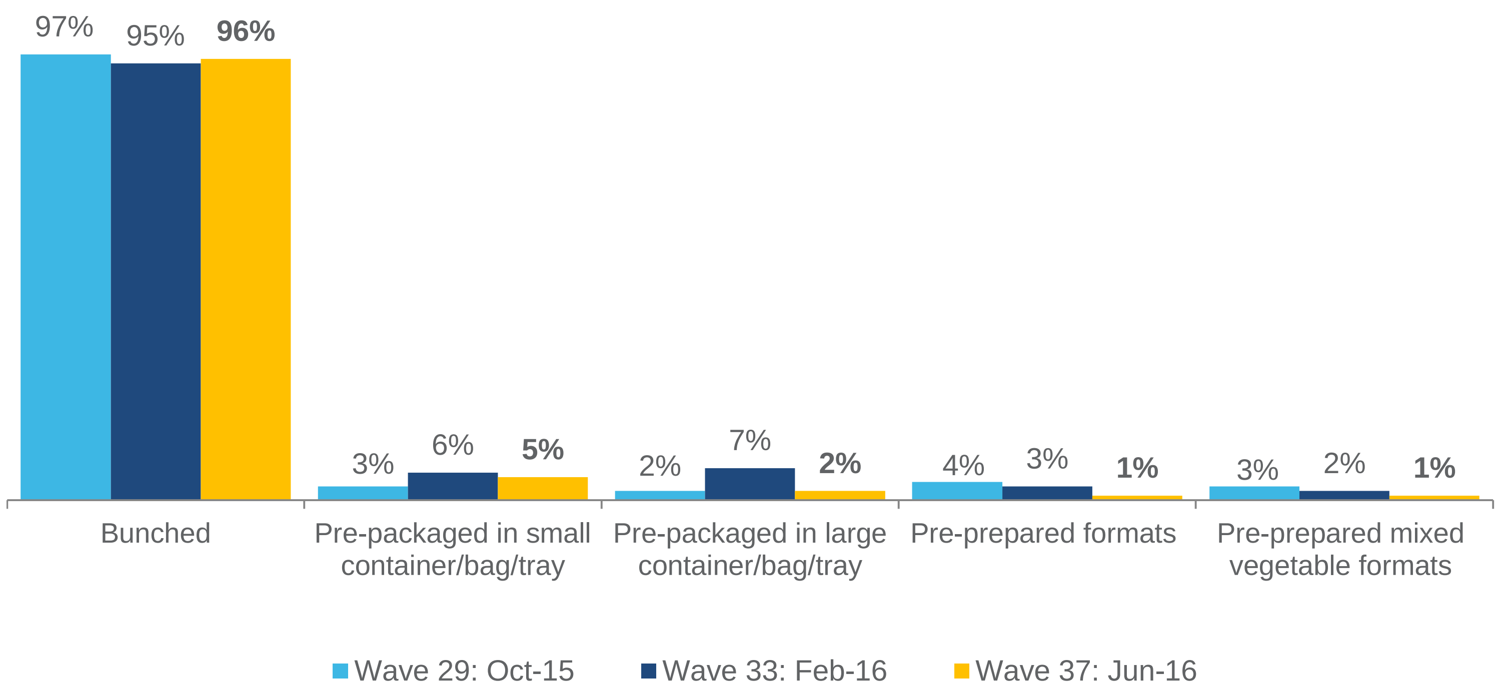
Consumers perceive silverbeet to be good value for money **(6.8/10)**, which has increased from past waves.

- ▼ 6.5/10, Wave 29
- ▼ 6.5/10, Wave 33

Q3. How much silverbeet do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 29 N=204, Wave 33 N=200, Wave 37 N=201

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

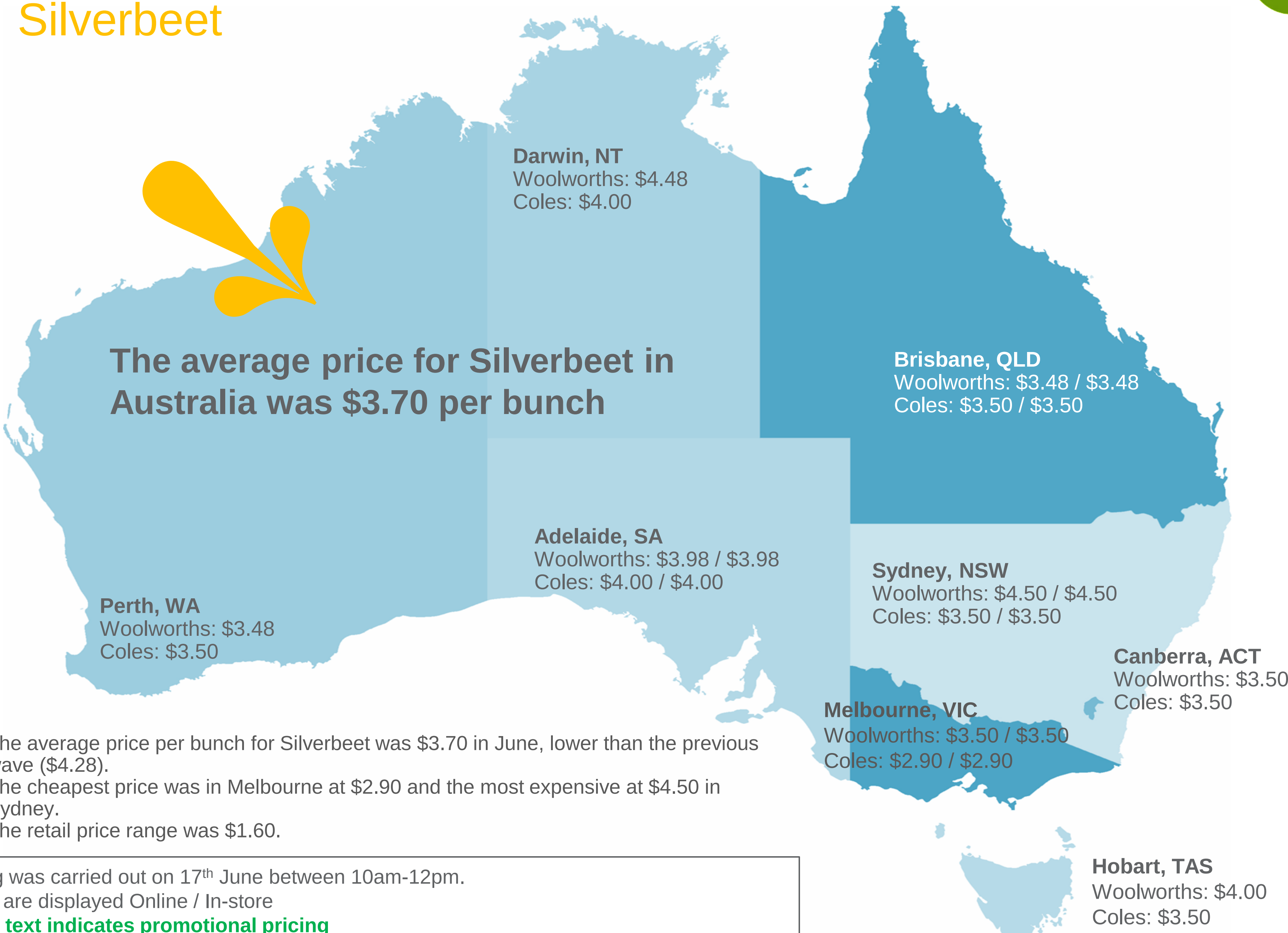
Nearly all consumers purchase silverbeet in bunched formats. This highlights the limited availability in other formats, including pre-packaged, which is currently purchased by a small number of consumers.



Q4b. In what fresh formats do you typically purchase Silverbeet?
Sample Wave 29 N=204, Wave 33 N=200, Wave 37 N=201

Online and In-store Commodity Prices

Silverbeet

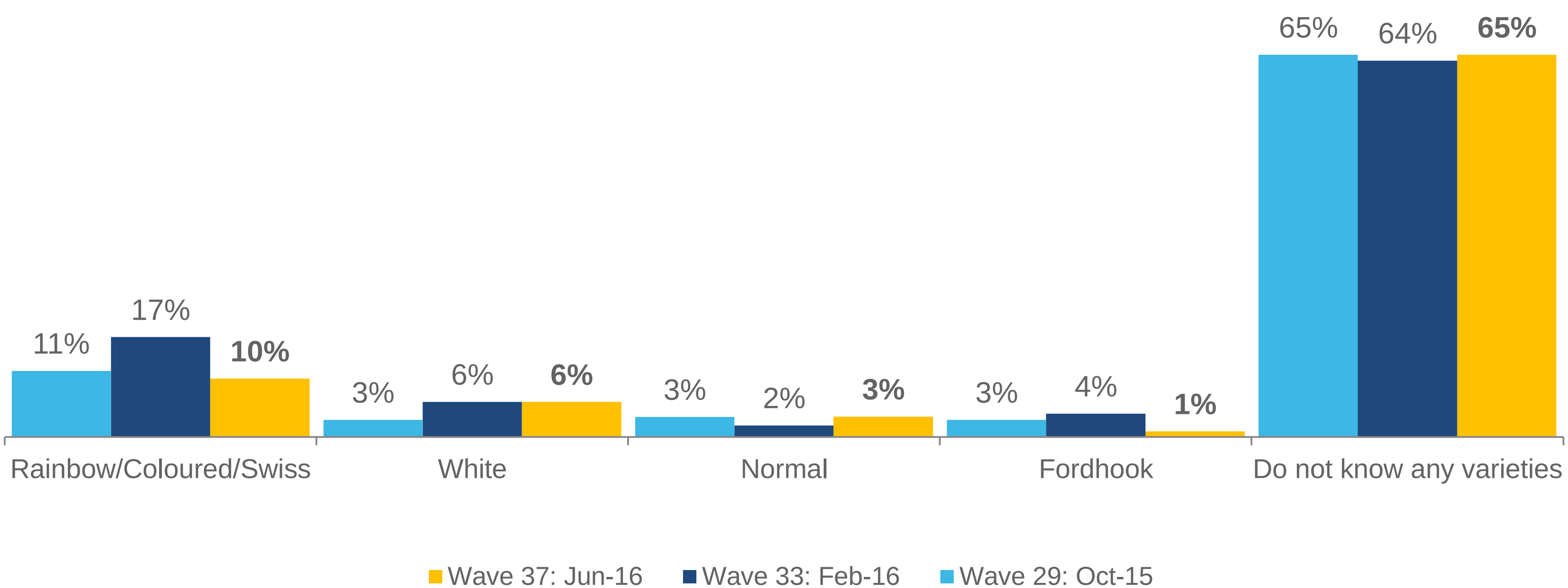


- The average price per bunch for Silverbeet was $3.70 in June, lower than the previous wave ($4.28).
- The cheapest price was in Melbourne at $2.90 and the most expensive at $4.50 in Sydney.
- The retail price range was $1.60.

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

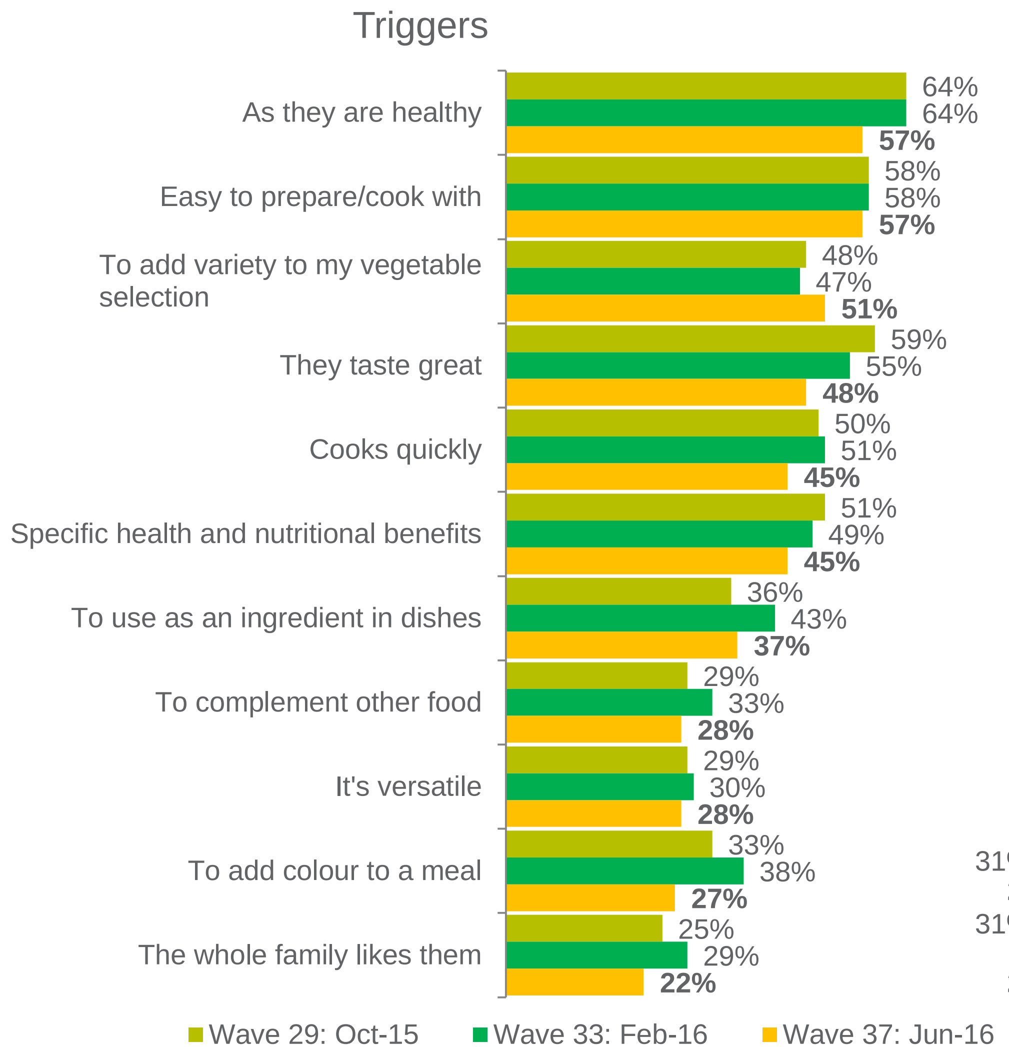
Spontaneous awareness for silverbeet is low, with the highest recall for rainbow/coloured/Swiss silverbeet.

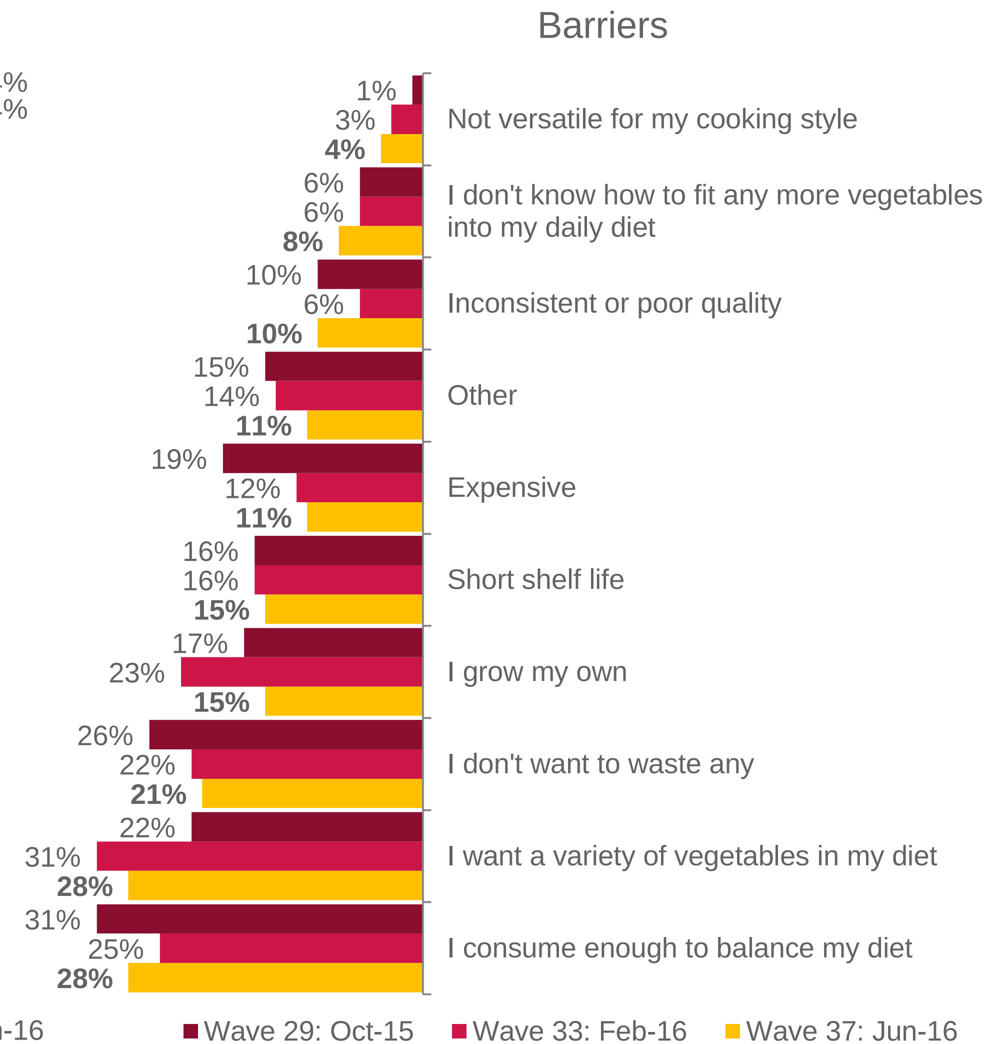
Spinach and Chard were also recalled by consumers as types of silverbeet.



Q6a. What varieties of Silverbeet are you aware of? (unprompted)
Sample Wave 29 N=204, Wave 33 N=200, Wave 37 N=201

The key drivers of purchase for silverbeet are health and ease of preparation. In contrast, already consuming enough for their needs and wanting a variety of vegetables are the main barriers to purchase. Taste has continued to decline as a trigger over the last three waves.





Q7. Which of the following reasons best describes why you purchase Silverbeet ?
Q8. Which reason best describes why you don't buy Silverbeet more often?
Sample Wave 29 N=204, Wave 33 N=200, Wave 37 N=201

Horticulture Innovation Australia
colmar brunton.

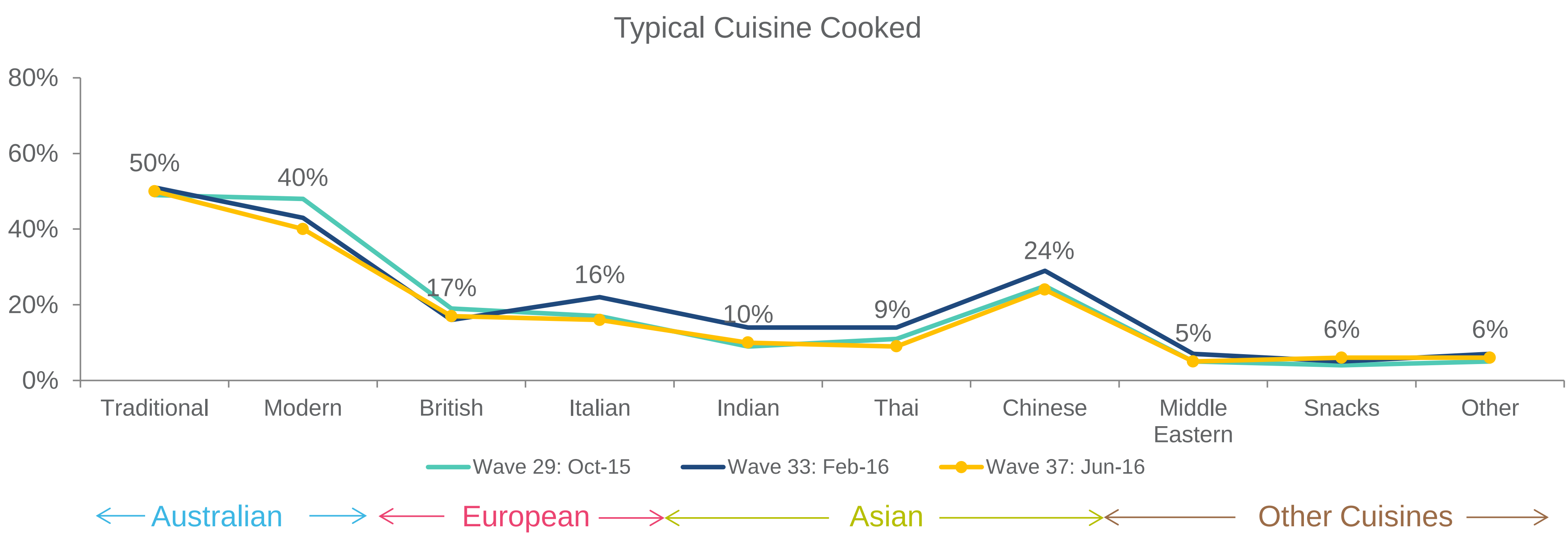
Silverbeet is popularly cooked in Australian and Chinese cuisine, consistent with past waves. Meal occasions tend to occur during dinner and family meals.

Top 5 Consumption Occasions

	Wave 33	Wave 37
Dinner	67%	**64%**
Family meals	62%	**62%**
Weekday meals	45%	**43%**
Quick Meals	40%	**31%**
Weekend meals	34%	**30%**

13% used silverbeet when cooking a new recipe

▲ 17%, Wave 33



Q10. What cuisines do you cook/consume that use Silverbeet?
Q11. Which of the following occasions do you typically consume/use Silverbeet?
Sample Wave 29 N=204, Wave 33 N=200, Wave 37 N=201

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

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

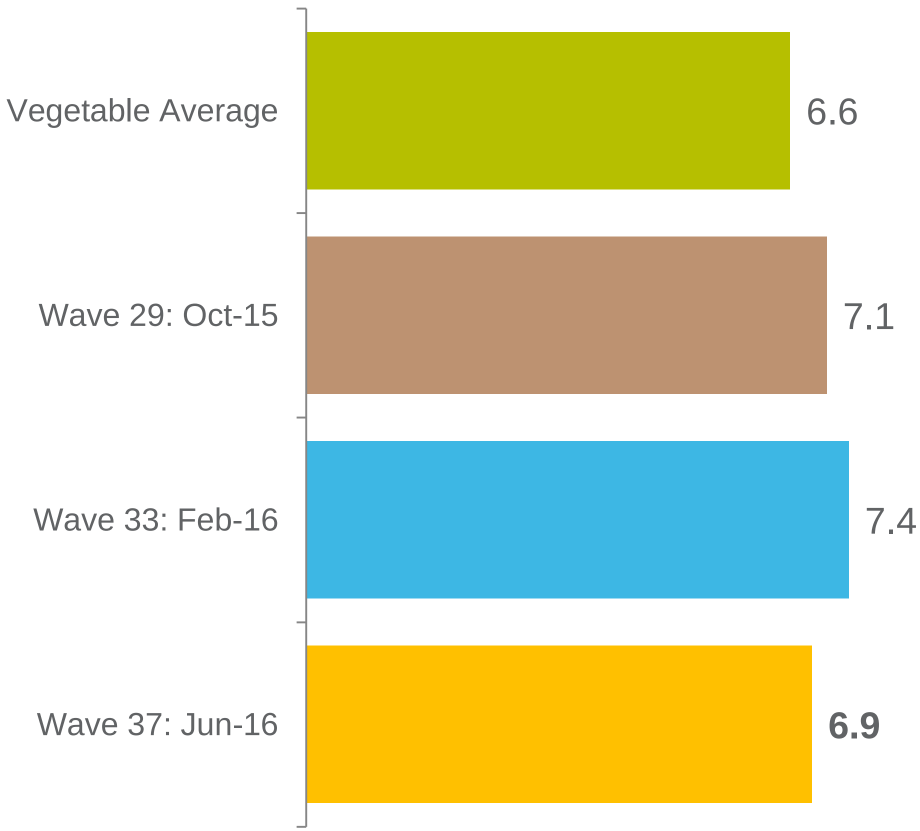
Accompanying Vegetables

Vegetable	%
Potato	59%
Carrot	53%
Pumpkin	34%
Cauliflower	29%
Sweet Potato	29%

Top 10 Cooking Styles	Wave 29	Wave 33	Wave 37
Steaming	54%	59%	**56%**
Boiling	39%	38%	**39%**
Stir frying	38%	43%	**36%**
Soup	16%	24%	**21%**
Sautéing	26%	22%	**18%**
Microwave	13%	9%	**14%**
Slow Cooking	7%	10%	**12%**
Baking	5%	13%	**10%**
Raw	9%	9%	**6%**
Frying	10%	11%	**6%**

Q9. How do you typically cook Silverbeet?
Q10a. And when are you serving Silverbeet which of the following do you also serve together with this?
Sample Wave 29 N=204, Wave 33 N=200, Wave 37 N=201

This wave sees a decline in the importance of provenance for silverbeet. However, knowing that silverbeet is grown in Australia remains highly important information to consumers.



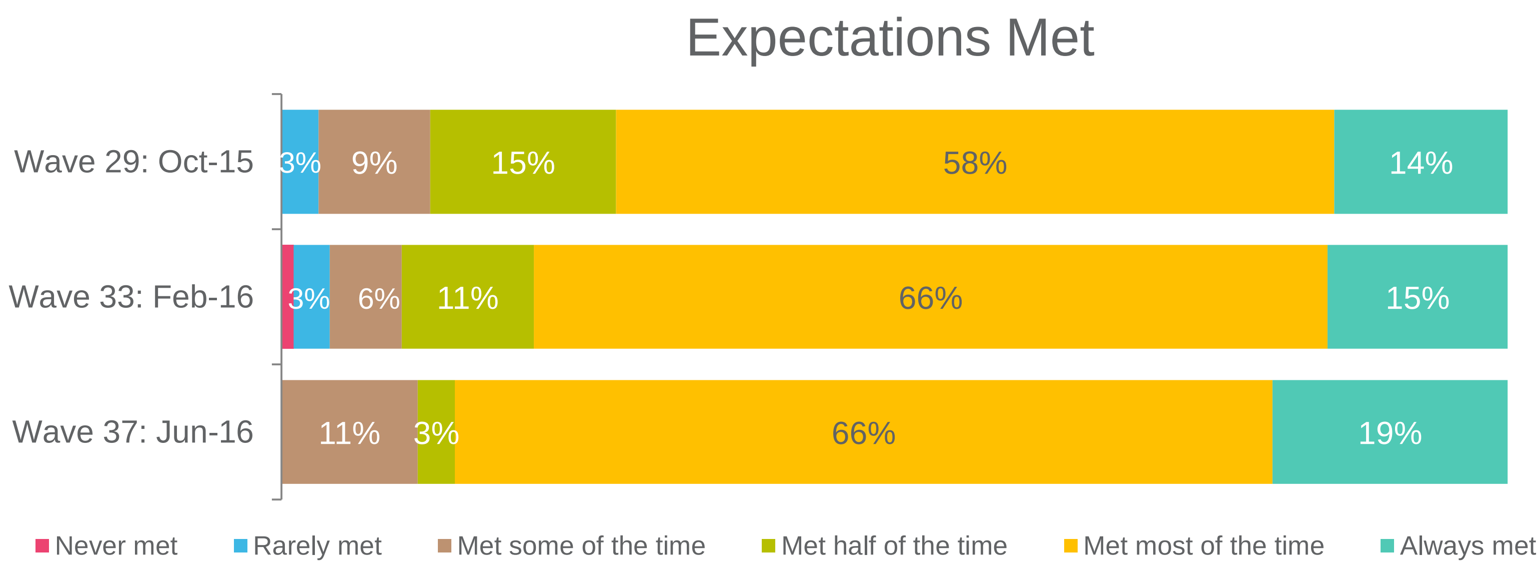
8.7

Q14. When purchasing Silverbeet, how important is Provenance to you?
Sample Wave 29 N=204, Wave 33 N=200, Wave 37 N=201

Freshness expectations for silverbeet have continued to improve since October 2015. There has been an increase in these expectations always being met this wave.

Expected to stay fresh for **6.2** days

▼ 6.0 days, Wave 29
▼ 5.8 days, Wave 33



Q12. How long do you expect Silverbeet to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy Silverbeet?
Sample Wave 29 N=204, Wave 33 N=200, Wave 37 N=201

Horticulture Innovation Australia
colmar brunton.

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

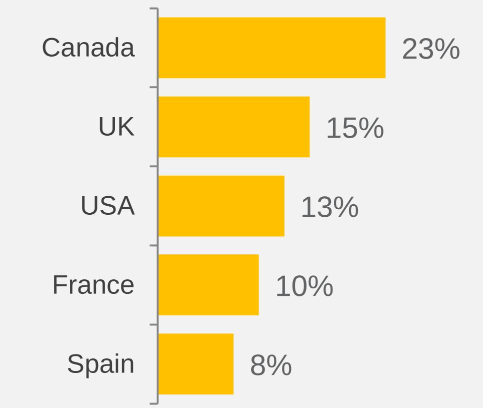
Silverbeet Product Launch Trends.

Silverbeet Global NPDs

March – June 2016

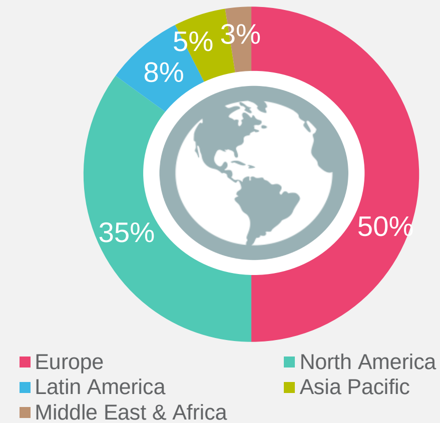
There were 40 products launched in the past three months that contained Silverbeet. Europe was the top region for launches, with Canada and UK being the key countries. Flexible packaging remained the most common format. Launches were predominately in the fruit and vegetables category.

Country

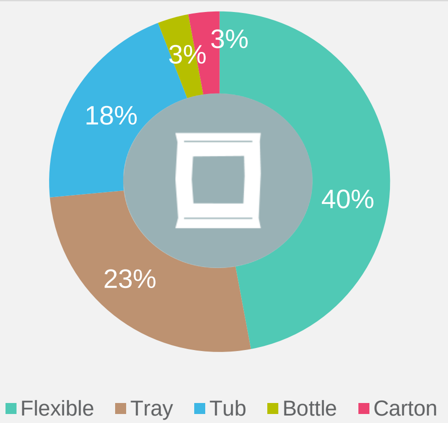


40 Global NPDs

Region



Top Pack Formats



Categories

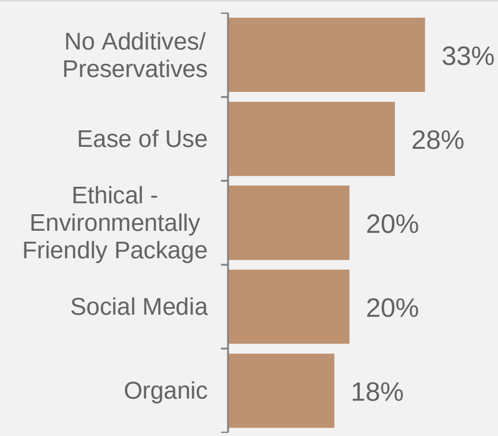
Fruit & Vegetables 53%

Meals 23%

Processed Products 8%

Side Dishes 5%

Top Claims



Silverbeet Product Launches:
Last 3 Months (March – June 2016)
Summary

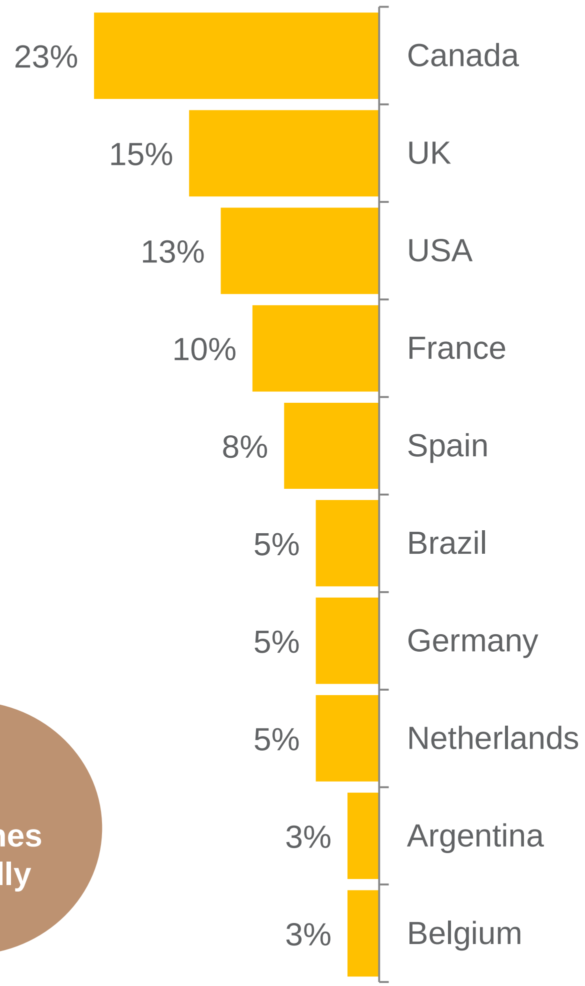
- A total of 40 products containing silverbeet as an ingredient were launched globally in the last 3 months.
- There were no silverbeet launches in Australia this quarter.
- Europe (50%) was the top region for launches. Key countries for innovation were Canada (23%), UK (15%) and USA (13%).
- Flexible packaging was the most widely used format for launches (40%), followed by tray formats (23%).
- Top categories for product launches were fruit and vegetables (53%), meals and meal centres (23%) and processed products (8%).
- Core claims for product launches globally included no additives/preservatives (33%), ease of use (28%), and ethical – environmentally friendly packaging (20%).
- The most innovative product was a Cappalletti pasta trio from Italy. Other examples of products can be found at the end of the silverbeet trend report.

Source: Mintel (2016)

Silverbeet Launches
Country & Categories

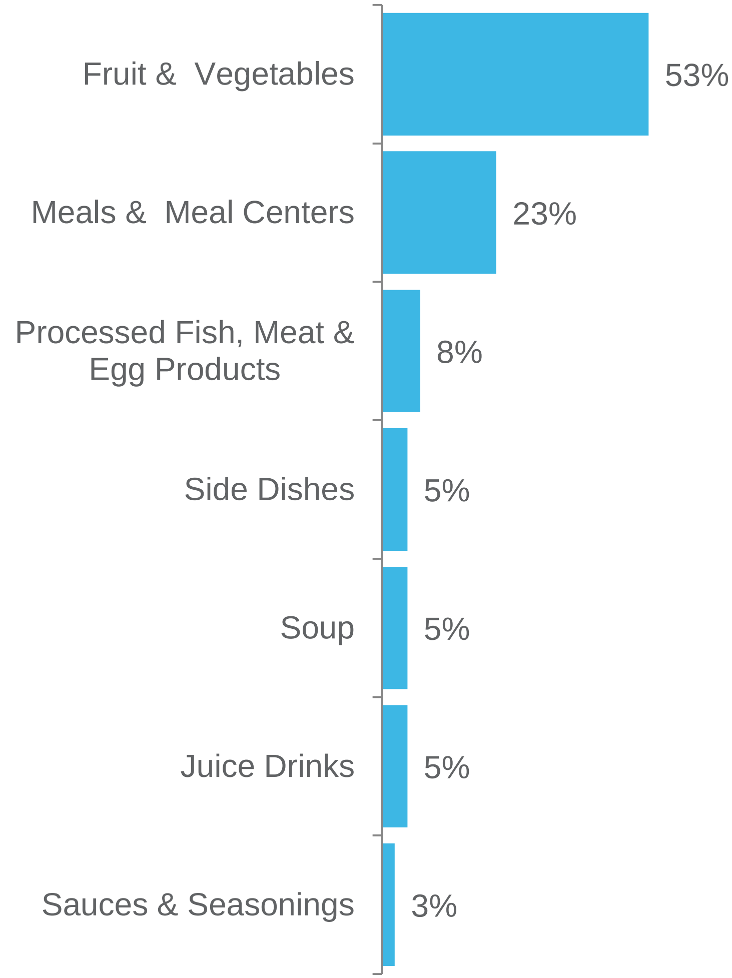
- The most active country for launches in the last 3 months was Canada, followed by UK and USA.
- Fruit and vegetables are the key category for launches, with meals and processed products also common launches.

Top Launch Countries



40 Launches Globally

Top Launch Categories



Silverbeet Launches
Top Claims & Pack Formats Used

- The primary format of choice was flexible packaging, consistent with previous waves. Trays and tubs were also popular formats.
- No additives/preservatives was the key claim used globally. Ease of use and environmentally friendly packaging were also prominent.

Pack Formats Used

	Format	%
Global	Flexible	40%
	Tray	23%
	Tub	18%
	Bottle	3%
	Carton	3%

Top Claims Used

	Claim	%
Global	No Additives/Preservatives	33%
	Ease of Use	28%
	Ethical - Environmentally Friendly Package	20%
	Social Media	20%
	Organic	18%

Only regions with n >30 are displayed

Innovative Silverbeet Launches:
L3M (March – June 2016)

Fresca y Lista Vegetable Cream Soup (Spain)

Fresca y Lista Crema de Verduras (Vegetable Cream Soup) can be microwaved for three minutes. The 100% vegetable based product contains nine different vegetables, is free from preservatives, colourings and animal fats, and retails in a 620g recyclable pack with two portions.

Claims:
No Additives/Preservatives, Microwaveable, Ethical - Environmentally Friendly Package, Ease of Use, No Animal Ingredients

Jumbo Ready! Vegetable Tarts (Argentina)

Jumbo Ready! Tartines de Verdura (Vegetable Tarts) are now available. This ready to bake and serve product is said to be quickly prepared after being cooked for 10 to 12 minutes in the conventional oven and retails in a 220g pack containing two units.

Claims:
Time/Speed, Ease of Use

Steve's Leaves Perfect Ploughman's Salad (UK)

Steve's Leaves Perfect Ploughman's Salad is now available. The product contains cheddar chunks, rustic crackers, pearl onions, mini gherkins and a pickle dressing. It has been washed in spring water and retails in a 130g pack bearing a Twitter link and Facebook reference.

Claims:
Social Media

Bondi Summer Cappelletti Pasta Trio (Italy)

Bondi l'Estate Cappelletti (Summer Cappelletti Pasta) is now available. This handmade egg pasta is said to be made according to the ancient traditions of Emilia Romagna, and includes an assortment of cappelletti pasta in three different flavours: red cappelletti stuffed with buffalo mozzarella and cherry tomatoes; yellow cappelletti stuffed with fresh squacquerone cheese and arugula; and green cappelletti stuffed with fresh spinach and herbs.

Claims:
No Additives/Preservatives, GMO-Free

Source: Mintel (2016)

Innovative Silverbeet Launches:
L3M (March – June 2016)

Woolworths Food Fresh Spinach, Broccoli & Kale Soup (South Africa)

Woolworths Food Fresh Spinach, Broccoli & Kale Soup is suitable for vegetarians with milk. This microwaveable, smooth and creamy product retails in a 600g pack.

Claims:
Microwaveable, Vegetarian

Eat Smart Plant Powered Protein Super Caesar Salad Kit (Canada)

Eat Smart Plant Powered Protein Super Caesar Salad Kit contains collard greens, Italian kale, red chard, broccoli stalk, savoy cabbage, dry roasted edamame, roasted sunflower seeds, chia seeds, parmesan cheese and classic Caesar dressing. This gluten and preservative free product is a high source of fibre and rich in vitamins A and C. It provides 14g protein per serving and retails in a 176g pack.

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

True Organic Organic Blissful Beets Juice Smoothie (Canada)

True Organic Organic Blissful Beets Juice Smoothie comprises a blend of juices from and not from concentrate with added ingredients including four red beets, two carrots, half a lemon, five and two thirds apples and a vegetable blend. This gluten-free, USDA organic and kosher certified product contains no sugar and retails in an 828ml pack.

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

Tarall'Oro Conchiglioni Ortolano Pasta (Brazil)

Tarall'Oro Massa Sêmola de Grão Duro Conchiglioni Ortolano (Conchiglioni Ortolano Pasta) is now available. This durum wheat semolina pasta cooks in 12 to 13 minutes, and retails in a 500g pack.

Claims:
N/A

Source: Mintel (2016)

Parsley.

On average, parsley is purchased approximately four times per month, and consumed eleven times per month.

Parsley is generally purchased from mainstream retailers. There has been a significant decline in purchase from specialist vegetable retailers this wave.

Average Purchase **3.6** times per month

— 3.6 times, Wave 29

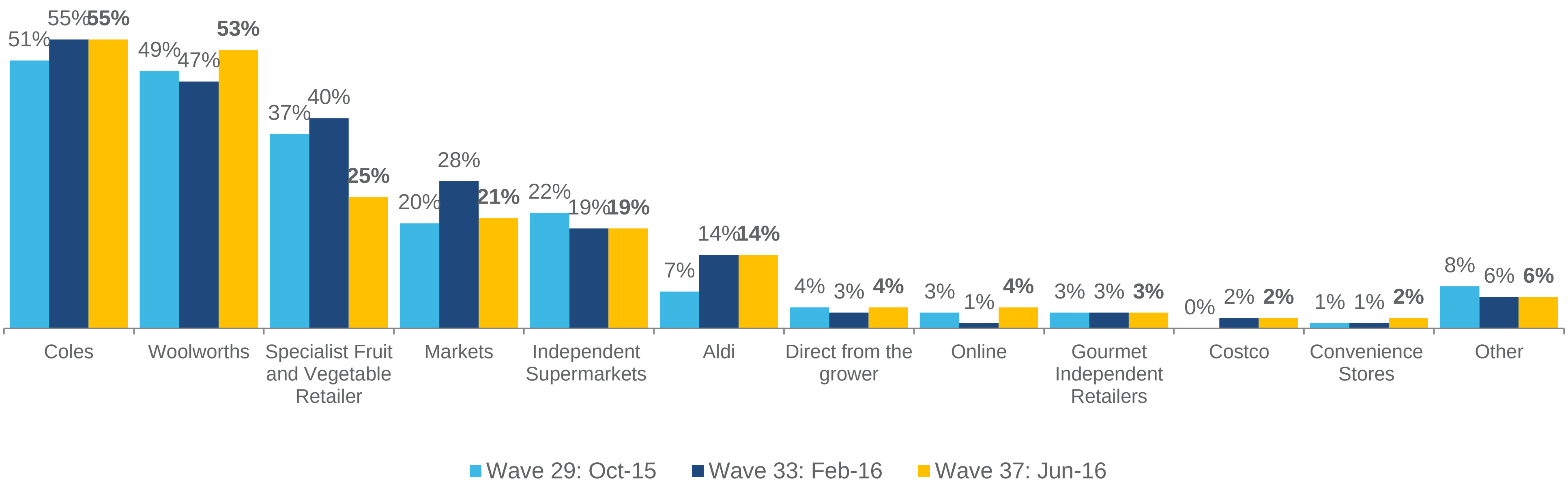
▲ 3.9 times, Wave 33

Average Consumption **11.4** times per month

▼ 10.4 times, Wave 25

▼ 10.8 times, Wave 33

Purchase Channels



Q1. On average, how often do you purchase parsley?
Q2. On average, how often do you consume parsley?
Q5. From which of the following channels do you typically purchase parsley?
Sample Wave 29 N=205, Wave 33 N=201, Wave 37 N=200

Horticulture Innovation Australia

colmar brunton.

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

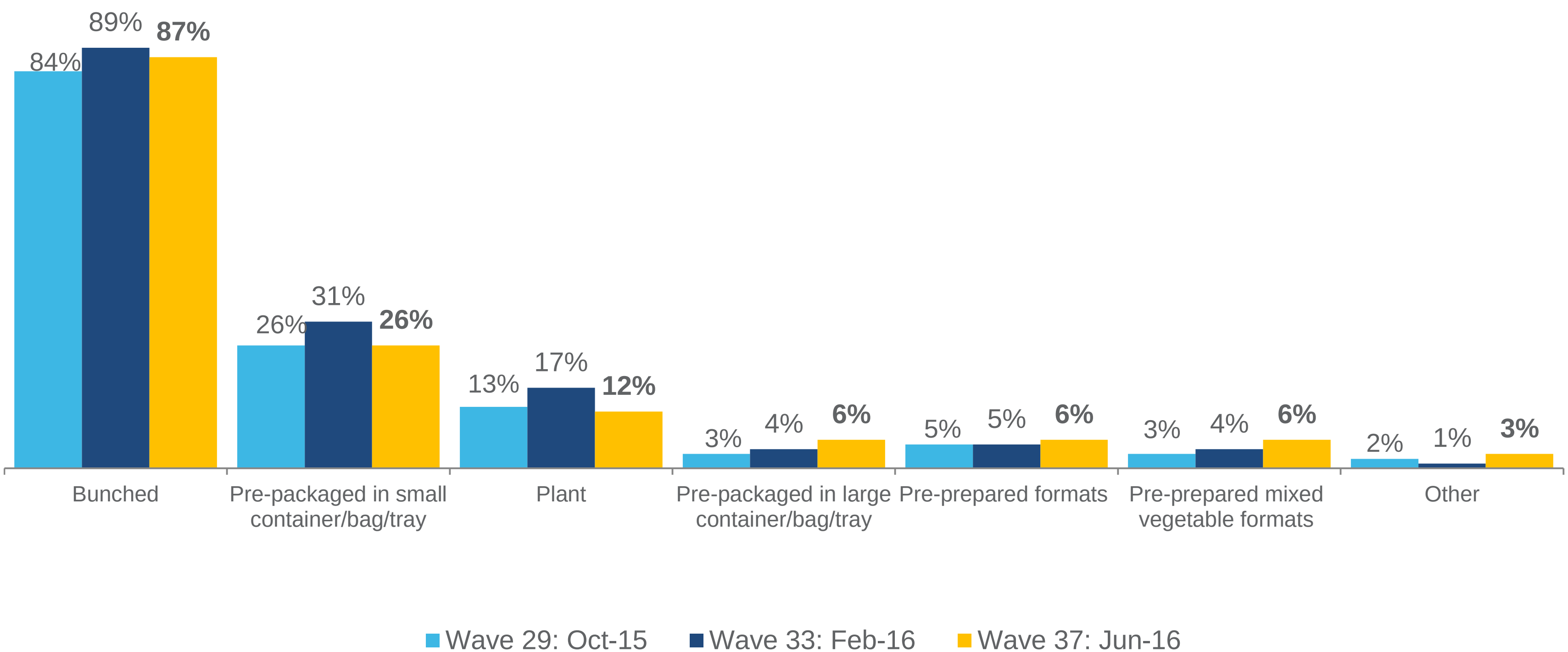
Average Spend and Price Sensitivity

Average weight of purchase	Recalled last spend	Value for money
The average consumer typically purchases **0.3kg** of parsley, which has increased from the previous waves.	Recalled last spend on parsley was **$2.90,** which has slightly increased this wave.	Consumers perceive parsley to be relatively good value for money **(6.2/10**), which has trended upwards over the last three waves.
▼ 0.2kg, Wave 29	▼ $2.80, Wave 29	▼ 5.6/10, Wave 29
▼ 0.2kg, Wave 33	▼ $2.70, Wave 33	▼ 5.9/10, Wave 33

Q3. How much parsley do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 29 N=205, Wave 33 N=201, Wave 37 N=200

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

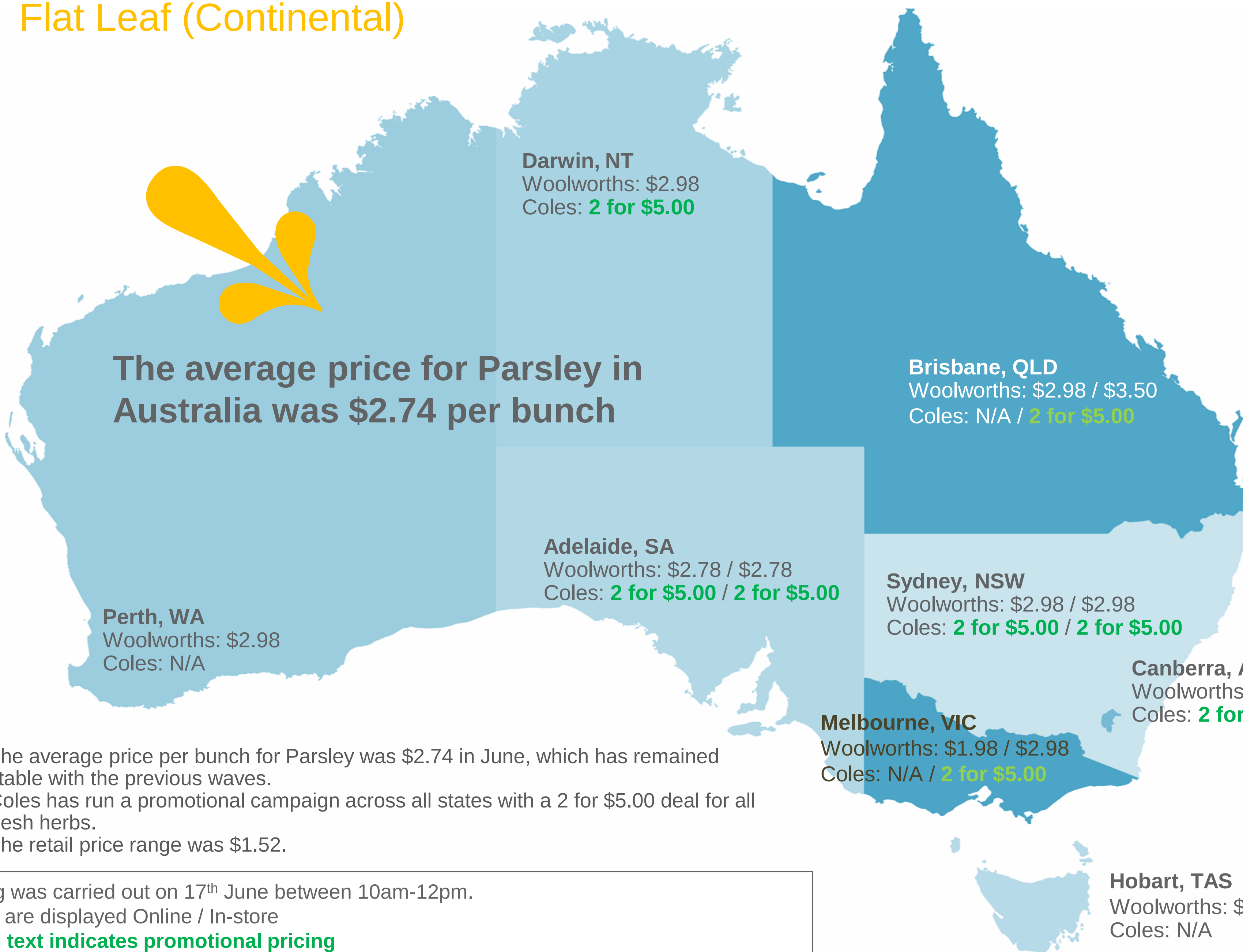
Bunched parsley remains the most common purchase format. Small bags and plants are other popular format options typically purchased by consumers.



Q4b. In what fresh formats do you typically purchase Parsley?
Sample Wave 29 N=205, Wave 33 N=201, Wave 37 N=200

Online and In-store Commodity Prices

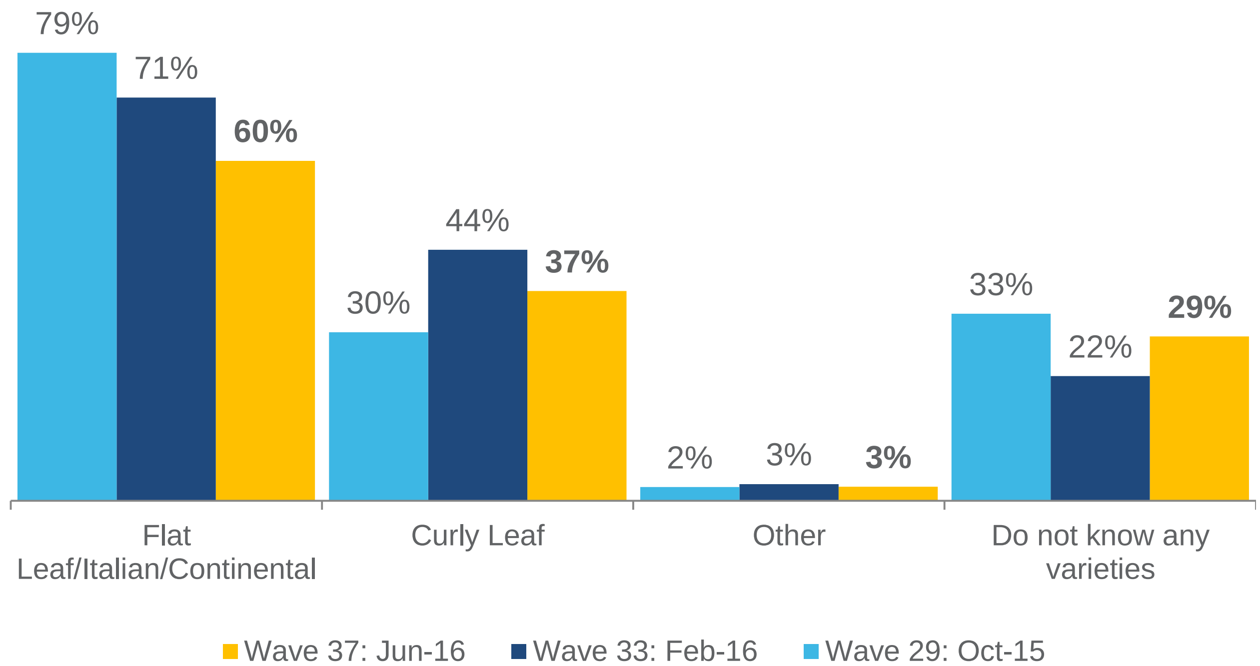
Flat Leaf (Continental)



- The average price per bunch for Parsley was $2.74 in June, which has remained stable with the previous waves.
- Coles has run a promotional campaign across all states with a 2 for $5.00 deal for all fresh herbs.
- The retail price range was $1.52.

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

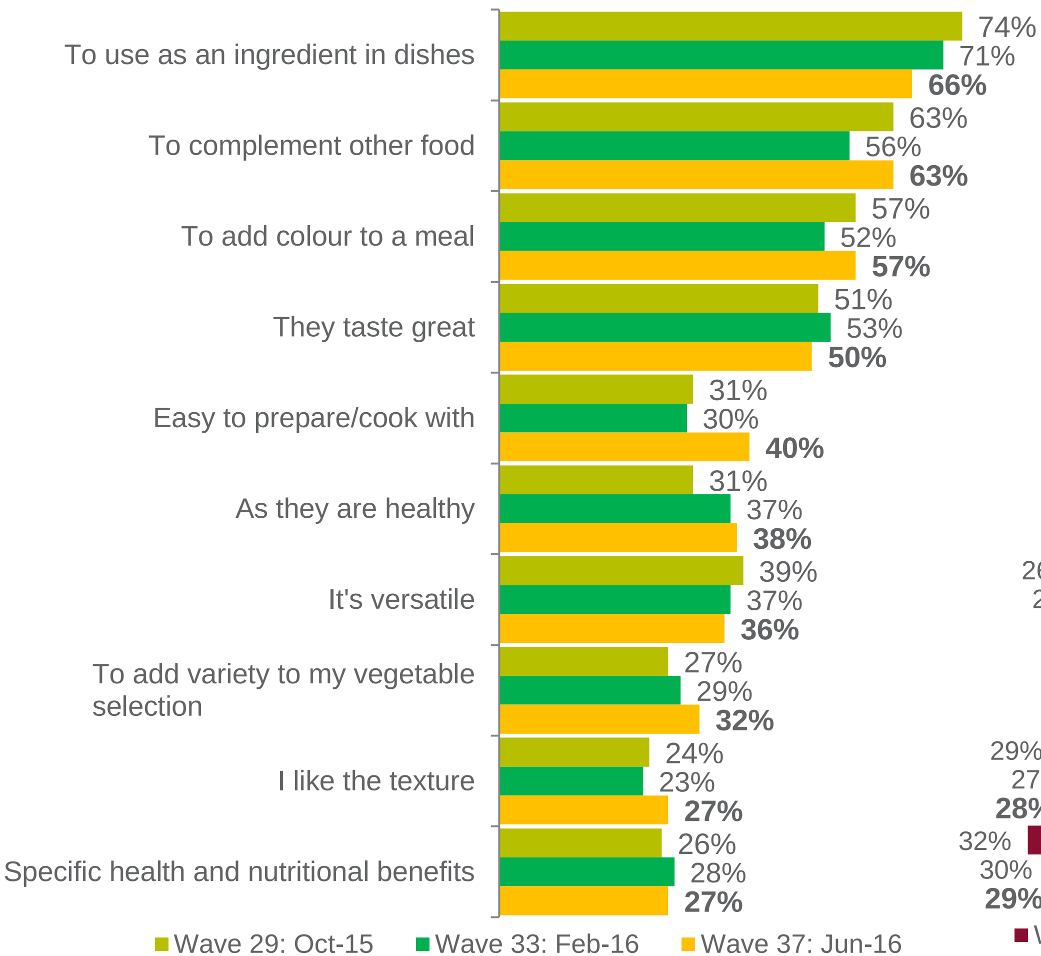
Awareness of parsley varieties has declined this wave. Most consumers recall Flat Leaf/Italian/Continental parsley and Curly Leaf parsley.



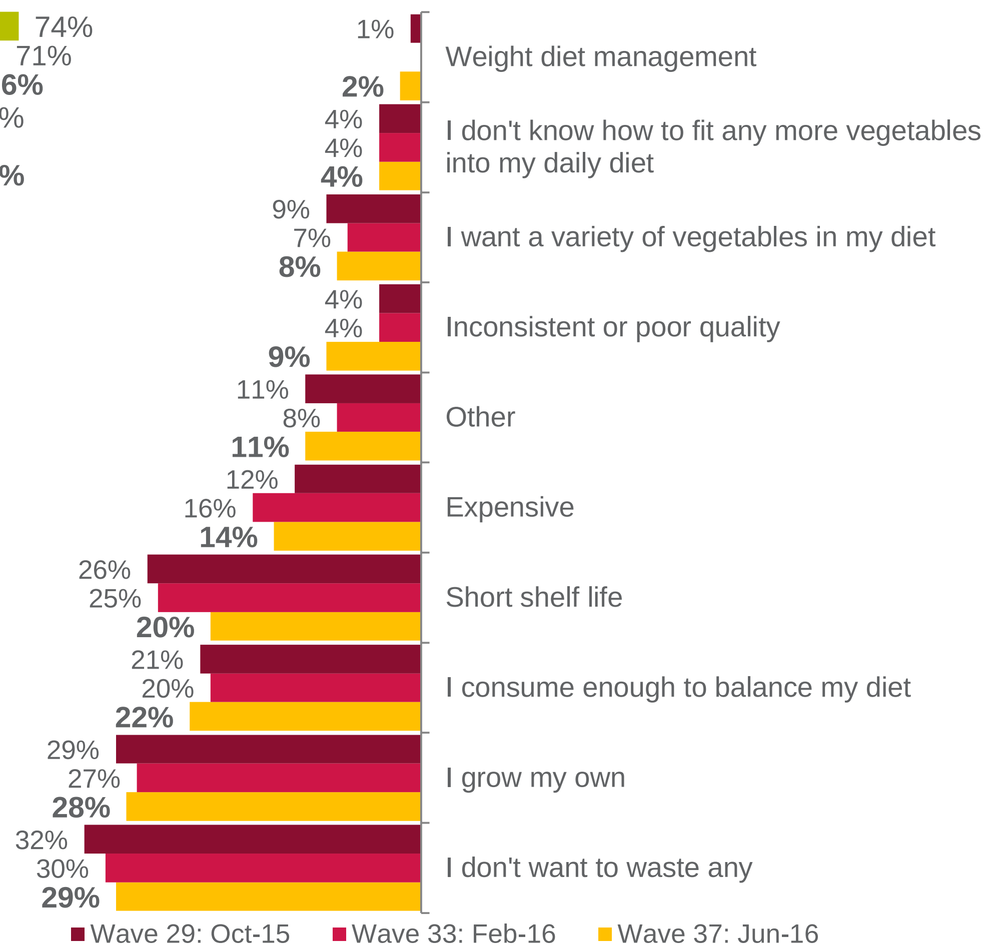
Q6a. What varieties of parsley are you aware of? (unprompted)
Sample Wave 29 N=205, Wave 33 N=201, Wave 37 N=200

Using parsley as an ingredient in dishes, complementing other foods and adding colour are the key drivers of purchase. In contrast, the key barriers to purchase are not wanting to waste any and growing their own parsley.

Triggers



Barriers



Q7. Which of the following reasons best describes why you purchase parsley?
Q8. Which reason best describes why you don't buy parsley more often?
Sample Wave 29 N=205, Wave 33 N=201, Wave 37 N=200

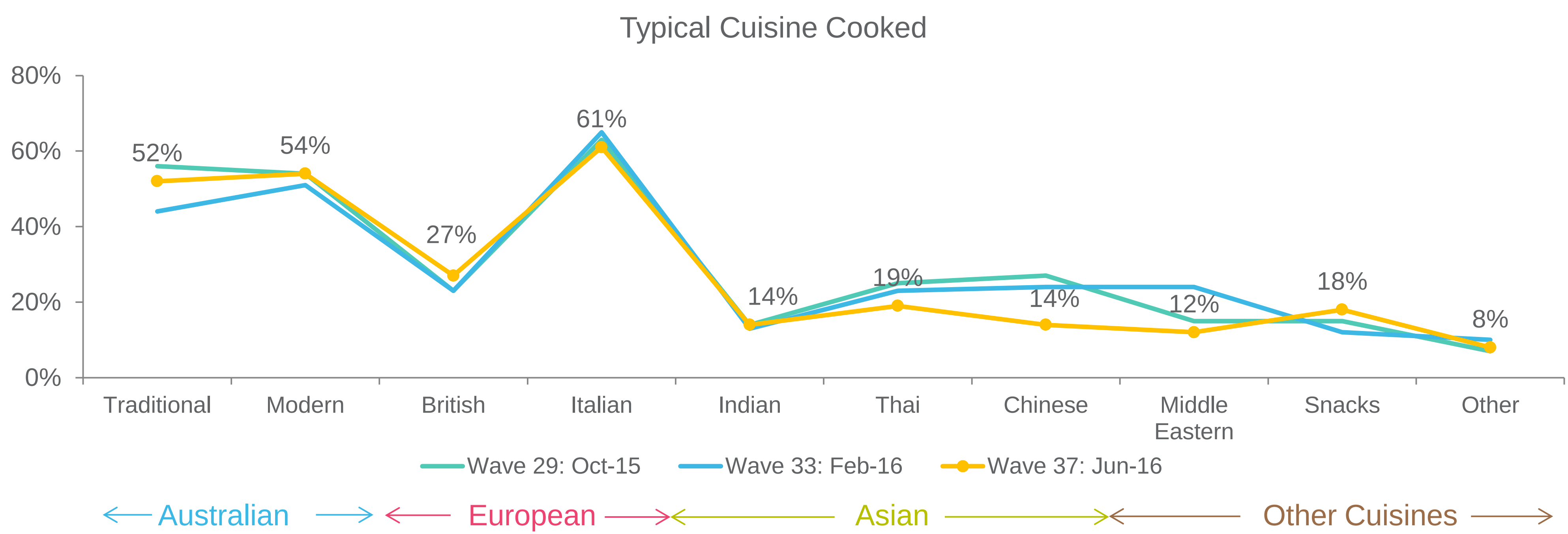
Italian and Australian cuisines are popular for parsley dishes. Consumption tends to occur during dinner and family meals, consistent with the past wave. A large proportion of consumers use parsley when cooking a new recipe.

Top 5 Consumption Occasions

	Wave 33	Wave 37
Dinner	68%	**71%**
Family meals	59%	**67%**
Weekday meals	53%	**49%**
Quick Meals	52%	**48%**
Weekend meals	46%	**48%**

41% used parsley when cooking a new recipe

▼ 34%, Wave 33



Q10. What cuisines do you cook/consume that use parsley?
Q11. Which of the following occasions do you typically consume/use parsley?
Sample Wave 29 N=205, Wave 33 N=201, Wave 37 N=200

Horticulture Innovation Australia

colmar brunton.

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

Consumers prefer to use parsley with tomatoes and potatoes, consistent with past waves. Parsley is generally consumed raw, but is also popularly cooked in soups and stir fries.

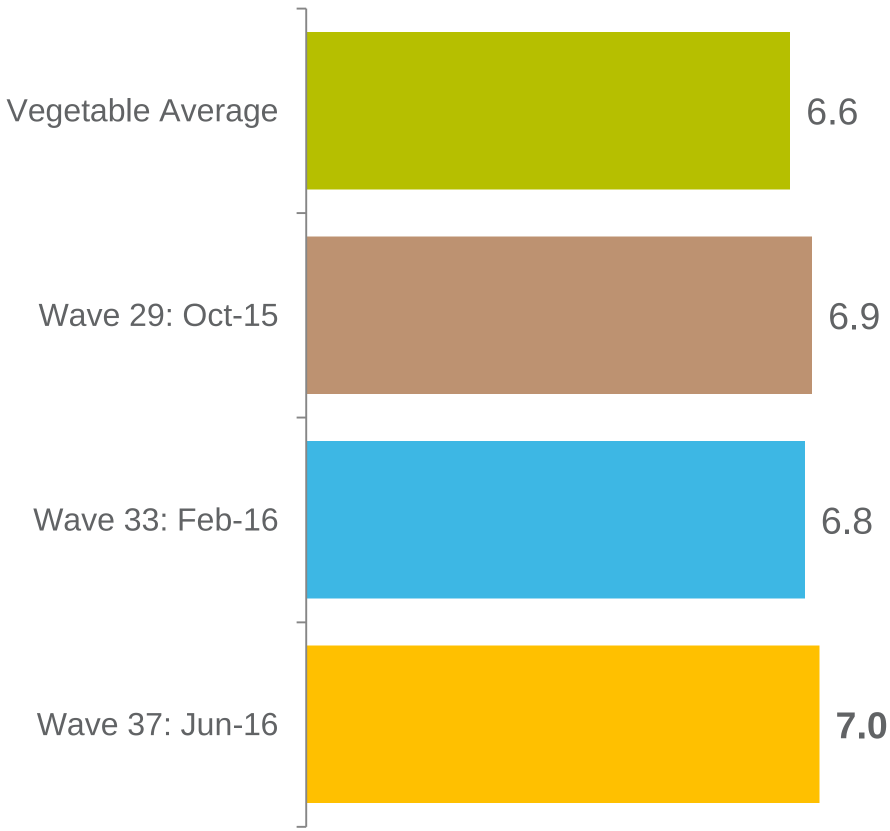
Accompanying Vegetables

Tomato	55%
Potato	54%
Onion	47%
Carrot	45%
Garlic	30%

Top 10 Cooking Styles			
	Wave 29	Wave 33	Wave 37
Raw	67%	66%	**56%**
Soup	37%	46%	**56%**
Stir frying	48%	37%	**42%**
Slow Cooking	26%	25%	**27%**
Baking	20%	16%	**19%**
Frying	16%	14%	**18%**
Mashing	17%	13%	**17%**
Sautéing	21%	24%	**17%**
Roasting	9%	14%	**12%**
Steaming	9%	14%	**12%**

Q9. How do you typically cook parsley?
Q10a. And when are you serving parsley which of the following do you also serve together with this?
Sample Wave 29 N=205, Wave 33 N=201, Wave 37 N=200

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



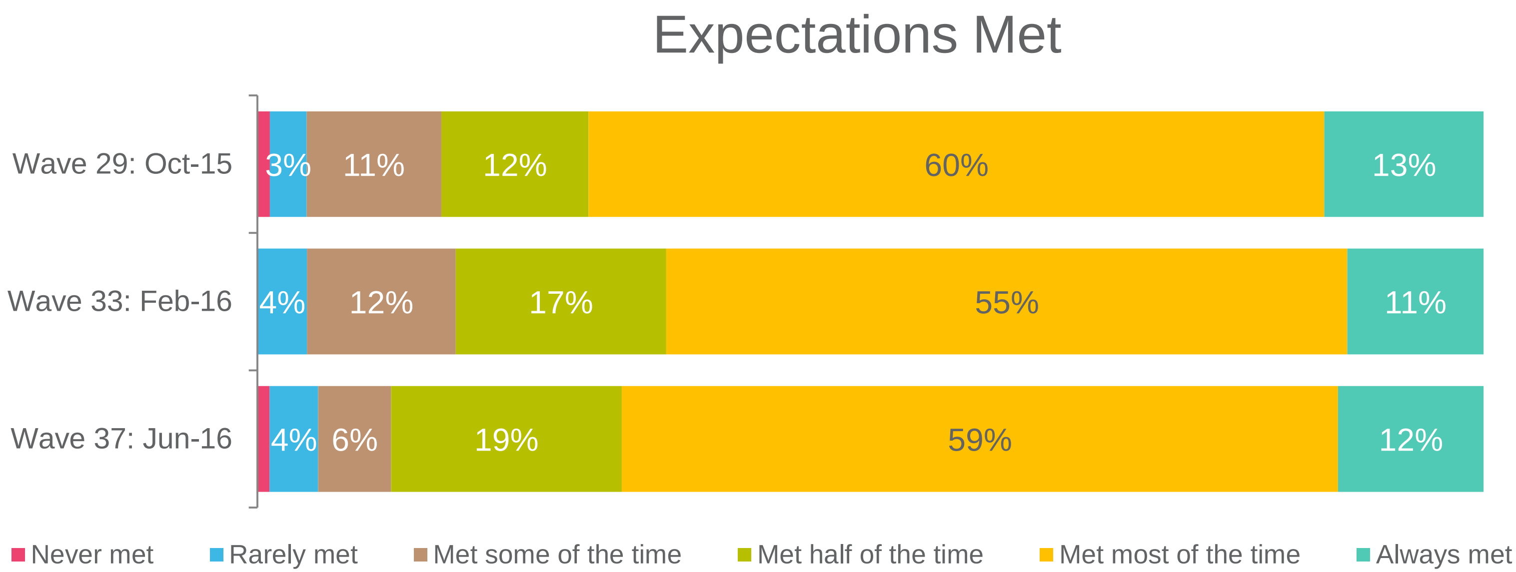
8.5

Q14. When purchasing parsley, how important is Provenance to you?
Sample Wave 29 N=205, Wave 33 N=201, Wave 37 N=200

Consumers expect parsley to remain fresh for just over a week once purchased. Expectations of the length of freshness remains relatively consistent with previous waves.

Expected to stay fresh for **7.7** days

▼ 7.4 days, Wave 29
▼ 7.4 days, Wave 33



Q12. How long do you expect parsley to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy parsley?
Sample Wave 29 N=205, Wave 33 N=201, Wave 37 N=200

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

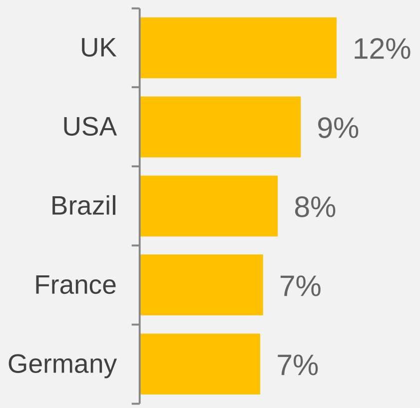
Parsley Product Launch Trends.

Parsley Global NPDs

March – June 2016

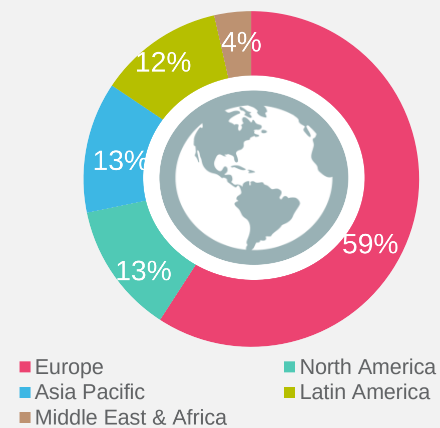
There were 1853 products launched in the past three months that contained Parsley. Europe was the key region for launches, with UK and USA being the main countries. Flexible packaging remained the most common format. Launches were predominately in the sauces & seasonings and meals categories.

Country

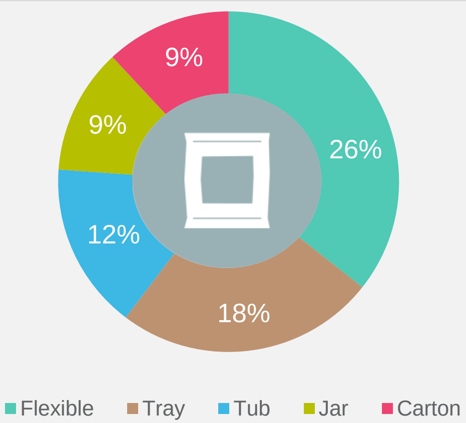


1853 Global NPDs

Region



Top Pack Formats



Categories

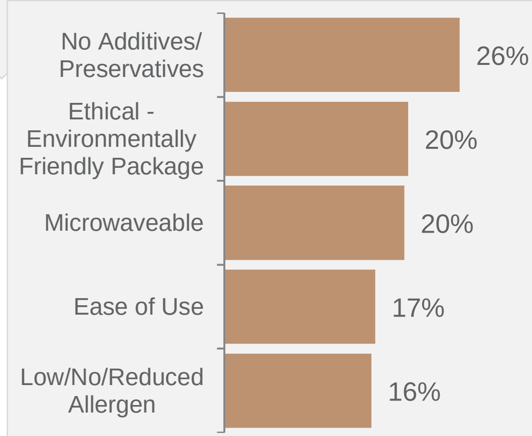
Sauces & Seasonings 24%

Meals 22%

Processed Products 15%

Snacks 11%

Top Claims



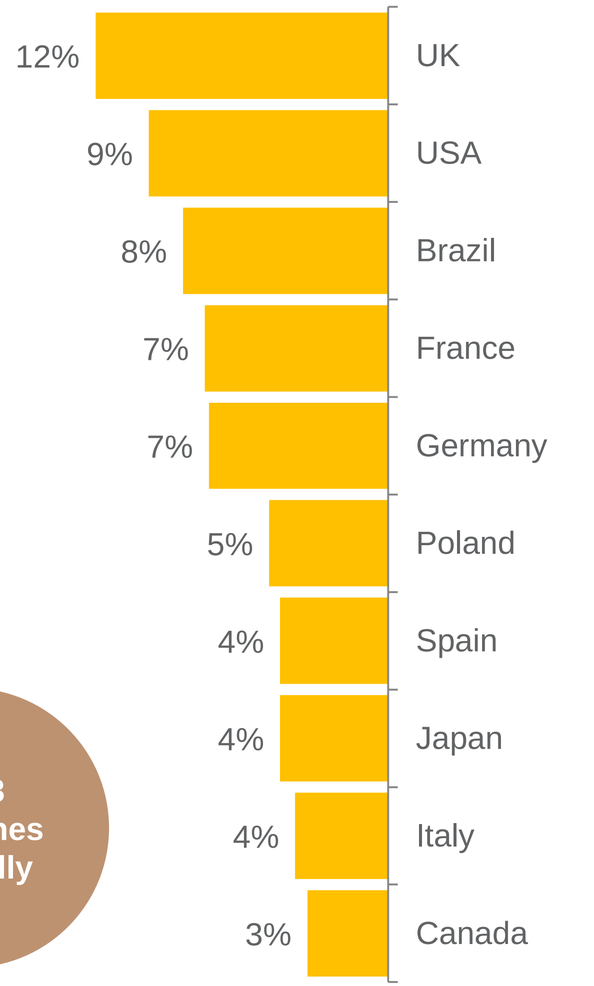
Parsley Product Launches:
Last 3 Months (March – June 2016)
Summary

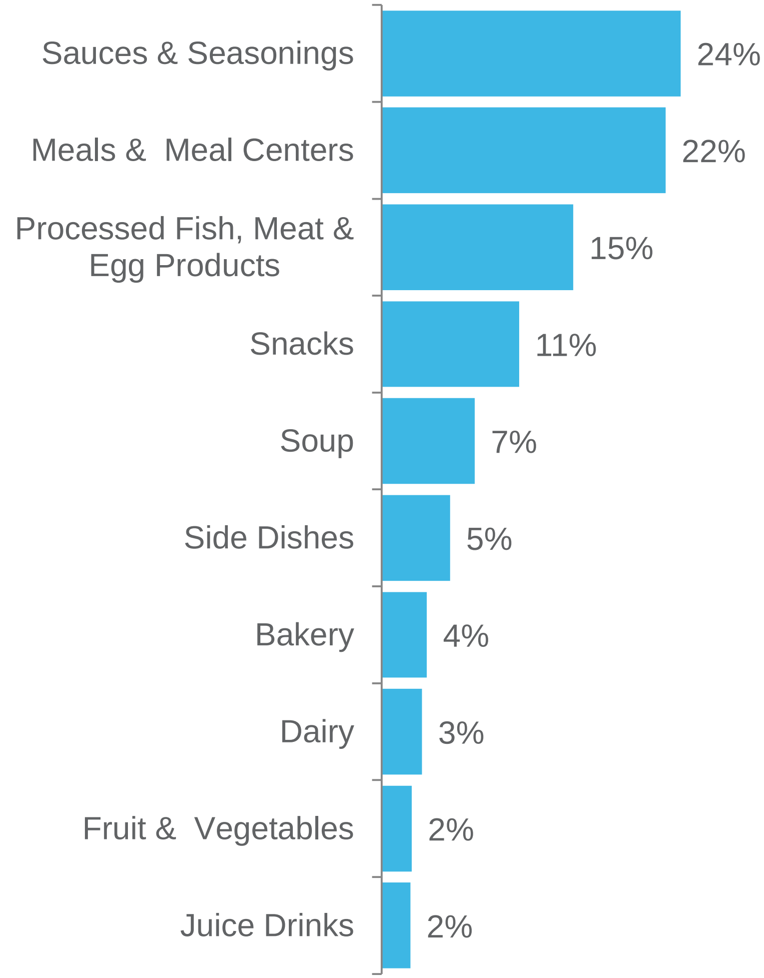
- A total of 1853 products containing parsley as an ingredient were launched globally in the last 3 months, which has declined since the previous quarter (2125).
- There were 45 parsley launches in Australia this quarter.
- Europe (59%) was clearly the top region for launches. Key countries for innovation were UK (12%), USA (9%), and Brazil (8%).
- Flexible packaging was the widely used format for launches (26%), followed by tray formats (18%).
- Top categories for product launches were sauces and seasonings (24%), meals and meal centres (22%), and processed products (15%).
- Core claims for product launches globally included no additives/preservatives (26%), ethical – environmentally friendly package (20%), microwaveable (20%), and ease of use (17%) .
- The most innovative product was the Guacachip – guacamole flavoured tortilla chips, launched in Canada. Other examples of products can be found at the end of the parsley trend report.

Source: Mintel (2016)

Parsley Launches
Country & Categories

- The most active country for launches in the last 3 months was the UK, followed by USA and Brazil.
- Sauces & seasonings and meals are the key categories for launches, followed by processed products and snacks.





Parsley Launches
Top Claims & Pack Formats Used

- Flexible was the primary format of choice of packaging. Trays and tubs were also common formats utilised.
- No additives and preservatives was the key claim used globally, with environmentally friendly packaging and microwaveable also popularly utilised claims.

Pack Formats Used

Global	Flexible	26%
Global	Tray	18%
Global	Tub	12%
Europe	Tray	25%
Europe	Flexible	23%
Europe	Tub	12%
North America	Flexible	29%
North America	Flexible stand-up pouch	12%
North America	Tub	11%

Top Claims Used

Global	No Additives/Preservatives	26%
Global	Ethical - Environmentally Friendly Package	20%
Global	Microwaveable	20%
Europe	No Additives/Preservatives	22%
Europe	Ethical - Environmentally Friendly Package	21%
Europe	Vegetarian	17%
North America	No Additives/Preservatives	35%
North America	Microwaveable	32%
North America	Kosher	29%

Innovative Parsley Launches:
L3M (March – June 2016)

El Sabroso Original Guacachip Guacamole Flavoured Tortilla Chips (Canada)

El Sabroso Original Guacachip Guacamole Flavoured Tortilla Chips have been repackaged with a new look. These tortilla chips are described as a combination of the great taste of a savoury corn snack with the buttery, rich flavour of avocado dip. The zesty snack is said to taste great right out of the bag or can be dipped in a dip mix or guacamole. These chips are flavoured with real avocado and retail in a 340g pack.

Claims:
N/A

M&S Meal for One Tomato & Basil Spaghetti (France)

M&S Meal for One Tomato & Basil Spaghetti comprises Italian spaghetti in an Italian plum tomato, basil and extra virgin olive oil sauce, garnished with fresh parsley and parmesan cheese. The microwaveable product is suitable for freezing and retails in a 400g partly recyclable pack featuring the FSC logo.

Claims:
Microwaveable, Ethical - Environmentally Friendly Package

Harvest Creations by Tampa Maid Breaded Pickle Chips (USA)

Harvest Creations by Tampa Maid Breaded Pickle Chips are now available. These crinkle cut dill pickle chips coated with seasoned flour and panko style breadcrumbs may be baked or fried. This product retails in a 32-oz. pack and includes 4-oz. of Remoulade sauce.

Claims:
N/A

M&S Spirit of Summer BBQ Grill Seabees in a Corn Husk with Tiger's Milk Dressing (Ireland)

M&S Spirit of Summer BBQ Grill Seabass in a Corn Husk with Tiger's Milk Dressing comprises a butterflied seabass wrapped in a corn hush with chargrilled corn, coriander and a chilli and lime dressing. The mild product is ready to cook, suitable for freezing, and retails in a partly recyclable 281g pack.

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

Source: Mintel (2016)

Innovative Parsley Launches:

L3M (March – June 2016)

M&S Thai Coconut Chicken Crisps (Ireland)

M&S Thai Coconut Chicken Crisps are made from the finest ingredients, 100% natural flavours and Sun Kernel oil, which is higher in monounsaturated fats and lower in saturated fats. The product suitable for vegetarians and retails in a 150g pack.

Claims:

Vegetarian, Low/No/Reduced Saturated Fat

Iberia Whole Parsley (Venezuela)

Iberia Perejil Entero (Whole Parsley) has been repackaged in a newly designed 15g pack. The product is suggested to be used in potato crepes, meats, salads and more.

Claims:

N/A

Dennree Organic Alpine Herb Cheese Slices (Croatia)

Dennree Ekoproizvod Sir Alpenkrauter (Organic Alpine Herb Cheese Slices) are sliced semi-hard cheese with 50% milk fat in dry matter and made from pasteurised milk and milk cultures. The naturally lactose-free product retails in a resealable 150g pack featuring the EU Green Leaf and BIO logos.

Claims:

Organic, Low/No/Reduced Allergen, Convenient Packaging, Low/No/Reduced Lactose

Sainsbury's Garlic & Parsley Basted Whole British Chicken (UK)

Sainsbury's Garlic & Parsley Basted Whole British Chicken contains added water and is topped with garlic and parsley butter. It is suitable for home freezing, and retails in an 1.375kg pack.

Claims:

N/A

Source: Mintel (2016)

Innovative Parsley Launches:
L3M (March – June 2016)

Stella Fried Calamari Flavoured Popcorn with Extra Virgin Olive Oil (India)

Stella Fried Calamari Flavoured Popcorn with Extra Virgin Olive Oil is said to feature the timeless taste of the sea. It is gluten-free and wholegrain, and contains no animal parts, MSG, preservatives or artificial colours. The all natural vegetarian popcorn retails in a 70g pack.

Claims:

No Additives/Preservatives, All Natural Product, Vegetarian, Gluten-Free, Wholegrain, Low/No/Reduced Allergen, No Animal Ingredients

Asda Grower's Selection Herby Wedges (UK)

Asda Grower's Selection Herby Wedges have been relaunched with a new brand name, previously known as Asda Simply Spuds, and retail in a newly designed 700g pack, providing four servings. These potato wedges in a herb dressing are suitable for vegetarians and can be cooked in 50 minutes.

Claims:

Vegetarian

Soso Premium Sea Salt & Herbs (Denmark)

Soso Pink Havsalt med Urter (Premium Sea Salt & Herbs) is now available. This hand harvested, unrefined salt contains no additives or gluten, and retails in a 100g pack.

Claims:

No Additives/Preservatives, Premium, Gluten-Free, Low/No/Reduced Allergen

Spar Premium Grilling Butter with Herbs & Spices (Austria)

Spar Premium Grill-Butter (Grilling Butter with Herbs & Spices) is now available. This Johanna Maier edition premium product contains 78% milk fat, 1.2% spices and 0.7% herbs. It is said to refine grilled beef, pork, chicken, turkey, fish, prawns, potatoes and vegetables as well as a toasted baguette, and retails in a 100g pack.

Claims:

Premium, Limited Edition

Source: Mintel (2016)

Top Australian Parsley Launches:
L3M (March – June 2016)

Mary's Gone Crackers Thins Kale Snack Crackers

McCormick Grill Mates American BBQ Classic All Star Burger Seasoning

The Real Homestyle Soup Aussie Angus Beef & Ale Soup

Coles Made Easy Australian Chicken, Parmesan & Garlic Parcel with Parmesan & Garlic Sauce in Flaky Puff Pastry

La Famiglia Kitchen Just For 2 Garlic Loaf

Red Rock Deli Special Edition Deli Style Roast Tomato, Basil & Bocconcini Potato Chips

Cucina Del Nonno Napoli & Basil Beef Ravioli

Smith's Duos Limited Edition Chicken & Honey BBQ Sauce Flavoured Crinkle Cut Potato Chips

Source: Mintel (2016)

In the Media.

General Vegetable News
(March – June 2016)

- Many Australians either do not wash their fruits and vegetables, or do not know how to 'properly' wash them. So, how do we wash our fruits and vegetables 'properly' then?
- The first step to 'properly' washing fruits and vegetables according to Dr Lisa Szabo, CEO NSW Food Authority, is to ensure you yourself have good personal hygiene habits. This includes washing hands with soap and water, as well as drying thoroughly. "Most fruit and veg needs to be washed before use," says Dr Szabo. "Wash with cool tap water immediately before eating – if you wash it then store it in the crisper, the water can actually lead to more contamination and bacteria." Dr Szabo asserts that pre-bagged lettuce or spinach that claims to be washed already can be used without further washing.
- Another common mistake is to prepare fruit and vegetables on the same chopping board as raw meat.
- For fruit and vegetables with hard skins, try using a hard-bristled brush to wash away excess dirt. Bruised or damaged areas should be discarded as bacteria can grow easily in these areas.
- Especially in Australia, the risk of becoming sick from fruit and vegetables is still very, very small. The favourable growing conditions and excellent standards for food and hygiene minimises the need to be concerned about our fresh fruits and vegetables.

Source: www.goodfood.com.au

Commodity News
(March – June 2016)

- General Mills Inc. have revealed that they will be introducing Pumpkin Spice Cheerios later this year. The cinnamon-laced flavour has become a popular culture phenomenon on its own, being used in everything from M&Ms to Jell-O products.
- The company hopes that the Pumpkin Spice Cheerios will help lift the appeal of cereal in a intensely competitive breakfast market.
- The product will be released on Labor Day in the United States this year.

http://www.bloomberg.com/

- A start-up company in the United States called Sonoma Brands has launched a range of bottled and chilled soup products.
- Branded as Züpa Noma, the soup is a convenient, on-the-go meal replacement or snack. It will be sold as a single serve or family-sized option which comes in six flavours. These include Organic Carrot Coconut Lime, Organic Tomato Gazpacho, Organic Yellow Pepper Habanero, Organic Beet Orange Basil, Organic Tomatillo Jalapeno, and Organic Cucumber Avocado Fennel.

http://www.fooddive.com/

- A machine being developed by Fraunhofer and industry partners will make automated, selective harvesting possible in the future.
- As cauliflower heads are hidden beneath numerous leaves, it makes it difficult to harvest cauliflower. This means that pickers have to pull back the protective leaves to look and decide whether the cauliflower is ripe for harvesting.
- The 'VitaPanther' machine will harvest cauliflowers just as selectively as human workers would. A prototype will be finished and tested in 2017.

http://www.foodprocessing.com.au/

- Green beans are in short supply around Australia, with prices at levels that have never been seen before. Restaurants around the country are paying high prices in order to keep them on the menu.
- Justyn McGrigor from Murdoch Produce stated that "it all comes down to the cold weather and the rain. It hasn't stopped [supply], but there's not as much coming through."
- Mr. McGrigor also said that there were no signs of the supply improving quickly.

http://www.abc.net.au/

Commodity News

(March – June 2016)

There was no Broccolini specific news to report this wave.

- A new hydroponic cultivation system, called MINICAMP, will be launched this month, making it possible to cultivate a wide range of fresh vegetables or flowers at home.
- MINICAMP consists of a hydroponic cultivation table which doesn't need any kind of substrate as the nutrients needed by the plants are supplied by means of a closed loop system.
- MINICAMP is intended for crops such as vegetables (silverbeet, lettuce, spinach, celery), herbs (parsley, peppermint, thyme etc.) or flowering plants (carnation, gerbera etc.)

http://www.freshplaza.com/

- Parsley and dill could stave off cancer as they contain chemicals that help to prevent tumours from forming. According to scientists, when molecules from both herbs were combined, they turned into a compound (glaziovianin A) already known for its anti-cancer properties.
- Drug developer Professor Alexander Kiselev, of Moscow Institute of Physics and Technology, said 'we have developed a simple method for producing glaziovianin A and its structural analogs - which inhibit the growth of tumour cells - from a cheap raw material.'
- They hope glaziovianin A from parsley and dill could help develop new medicine that can be used as anti-cancer drugs in future.

http://www.freshplaza.com/

Background & Methodology.

Background & Setting the Scene.

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

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

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

This wave's report (Wave 37, June 2016) focuses on:

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

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

Online Methodology.

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

General Respondent Questions

Demographics

Vegetable Consumption

1/7 Commodities

Commodity Specific Questions

Category Health

Purchase & Consumption Habits

Price Perceptions & Average Spend

Triggers/Barriers to Purchase

Preparation Preferences

+ 2 Ad hoc Questions per Month

Sample.

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

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

To qualify for the questionnaire, respondents...

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

	Beans n=306	Carrot n=306	Cauliflower n=304	Pumpkin n=302	Baby Broccoli n=205	Silverbeet n=201	Parsley n=200
Gender							
Male	37%	35%	37%	35%	46%	30%	26%
Female	63%	65%	63%	65%	54%	70%	75%
Age							
18-24 y.o.	25%	25%	24%	24%	2%	1%	4%
25-34 y.o.	10%	10%	10%	11%	7%	5%	12%
35-44 y.o.	14%	13%	13%	11%	8%	10%	11%
45-54 y.o.	12%	14%	16%	17%	14%	17%	21%
55-64 y.o.	20%	19%	18%	18%	33%	34%	29%
65+ y.o.	18%	19%	19%	20%	36%	32%	25%
Household							
Single Income no Kids	28%	30%	27%	24%	23%	16%	18%
Double Income no Kids	16%	16%	13%	16%	18%	13%	19%
Young Families	8%	12%	11%	10%	8%	8%	9%
Established Families	25%	22%	24%	26%	15%	21%	22%
Empty Nesters	22%	21%	24%	25%	36%	41%	34%
Location							
New South Wales	19%	20%	16%	19%	16%	14%	21%
Victoria	19%	19%	20%	17%	22%	17%	16%
South Australia	19%	18%	16%	19%	16%	17%	18%
Queensland	20%	20%	19%	21%	23%	18%	13%
Western Australia	14%	11%	21%	16%	12%	18%	22%
Tasmania	4%	7%	3%	6%	6%	12%	6%
Australian Capital Territory	5%	5%	3%	3%	4%	2%	5%
Northern Territory	0%	1%	1%	1%	1%	0%	1%

Trends Research: Our Approach

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

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

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

Commodity

Number of Launches L3M

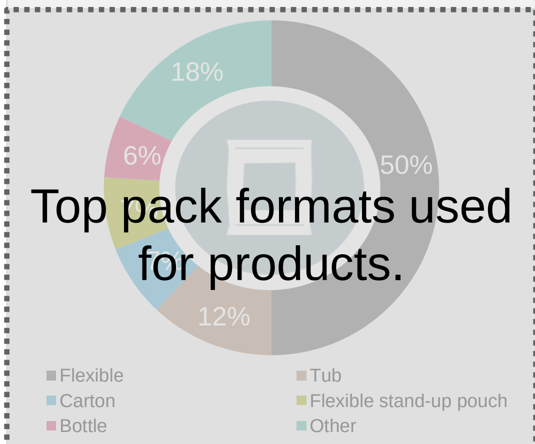
Country

Top countries where products were launched.

Region

What regions new products were launched in.

Top Pack Formats

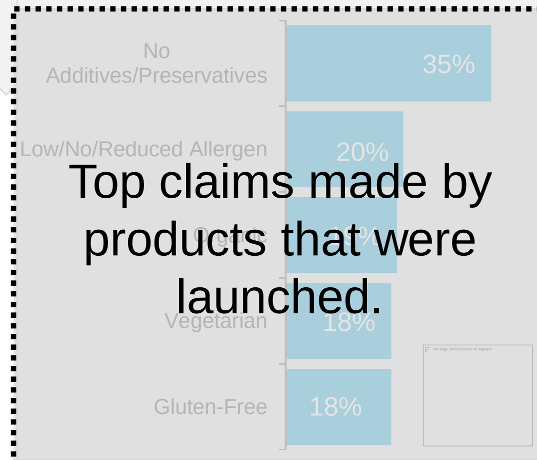


Top pack formats used for products.

Top Categories

Top categories that products were launched in.

Top Claims



Top claims made by products that were launched.

Thanks.