Project Harvest Monthly Tracker Report.

Wave 38, July 2016

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

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

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Contents.

Wave 38:
Executive Summary

Industry Insight.

87% of Australian consumers are active online, and this number is growing year-on-year. Electronics, gift cards, jewellery and travel related products are amongst the most commonly-bought items online, but when it comes to grocery shopping specifically, the figures are relatively low. Although 44% of us refer to websites and apps to *assist* in grocery shopping for product information via recipe ideas, price checks and the like only 10% of us actually do our grocery shop online, and this is at an average of 2-3 times a year.

Over a third of us have bought grocery items such as toiletries, personal care items, household cleaning products and packaged foods online but less than a fifth have bought fresh fruit and vegetables online. In fact, specific barriers for online grocery shopping overall include the perceptions of poor quality fresh fruit (22%) and poor quality fresh vegetables (24%).

Industry Insight continued.

So online activity is growing rapidly, but online grocery shopping is increasing at a much slower rate. As powerfully as lifestyle factors drive the desire for online convenience, perceptions of quality and choice issues hamper it.

With 18% of Australian consumers predicting they will increase their online grocery shopping in the next 12 months and 32% predicting increased online spend within the same period, is it time to think about how fresh produce can play a bigger part in that? How can choice be facilitated and quality assured?

Increasing online purchase

- Pumpkin
- Carrots
- Zucchini
- Sweet Corn
- Brussels Sprouts
- Spinach
- Celery
- Green Peas
- Beans
- Capsicums
- Cauliflower
- Asian Vegetables
- Parsnips
- Broccoli
- Kale
- Silverbeet
- Cabbage
- Lettuce
- Cucumber
- Radish
- Eggplant
- Leek
- Baby Broccoli
- Parsley
- Beetroot
- Sweetpotato
- Spring Onion
- Chillies

Broccoli Grower Action Plan.

Wave 38 Fast Facts – Broccoli

- There are high levels of satisfaction and endorsement for broccoli.
- On average broccoli is purchased 4 times per month and consumed 10 occasions per month. Mainstream retailers are the main purchase locations.
- Consumers typically purchase 700g of broccoli per occasion, a slight decline from the previous wave. Broccoli is perceived to be relatively good value for money. Individual heads of broccoli are the preferred format.
- National pricing analysis revealed an average of $5.37 per kg, which is lower than prices recorded in March 2016.
- Overall awareness of broccoli types remains low. Nearly two thirds of consumers are unable to recall any variety.
- The key motivations for purchasing broccoli are health and ease of preparation. The main barriers to purchase are already consuming enough and price.
- Broccoli is expected to remain fresh for just over a week. Expectations of freshness are increasingly being met at least most of the time.

51% of consumers stir fry broccoli.

1. Insight:

Quick cooking time has increased as a trigger to purchase. More consumers are stir frying their broccoli.

Short Term Recommendation:

Provide convenient recipe ideas at point of sale clearly call out cooking times to appeal to time conscious consumers. Investigate the opportunity to provide pre-prepared fresh broccoli florets, which will save consumers on preparation time.

2. Insight:

Broccoli holds strong levels of satisfaction with consumers. However, increase in future purchase is minimal.

Long Term Recommendation:

Consider strategies in order to inspire and encourage greater consumption of broccoli. Including pairing with adjacent categories such as dairy, nuts and ancient grains e.g. pre-prepared broccoli and feta packs, broccoli & quinoa, and a broccoli mornay meal kit.

Chilli Grower Action Plan.

Wave 38 Fast Facts – Chilli

- Chillies hold strong importance to consumers and are likely to be recommended to family and friends. There is strong future purchase intent for chillies.
- Chillies are purchased 3 times a month and consumed on 12 occasions per month. Purchase is from mainstream and specialist retailers.
- Consumers generally purchase 300g of chillies, with recalled last spend at $3.80. Overall, chillies are perceived as relatively good value for money, slightly increasing this wave.
- Pricing analysis revealed the average national price for long red chillies was $19.95 per kg, slightly higher than prices in March 2016.
- There is a high level of recall for chilli varieties. Jalapeno and birds eye have the greatest awareness amongst consumers.
- Main triggers for purchasing chillies are to use as an ingredient in dishes and taste. The key barriers to purchase are not wanting to waste any and consuming enough for their needs.
- Chillies are expected to remain fresh for approximately 12 days, and this freshness is met most of the time.

23% of consumers intend to increase the amount of chilli they purchase in the future.

1.

Insight:

Wastage remains the main barrier to future purchase of chillies.

Short Term Recommendation:

Educate consumers at point of sale on:

- Heat level – choosing the appropriate variety of chilli for their cooking
- Versatility – using chillies in multiple recipes
- Storage – to maintain freshness between use

2.

Insight:

Consumers are very interested in new chilli varieties.

Long Term Recommendation:

To maintain consumer engagement, investigate new variety opportunities for the Australian market. Look to international supermarkets for successful launches i.e. Carolina Reaper launched at Tesco UK.

Lettuce Grower Action Plan.

Wave 38 Fast Facts – Lettuce

- Lettuce holds high levels of importance and satisfaction with consumers. Future purchase intent has remained stable.
- Lettuce is purchased on average 4 times per month and consumed approximately 12 times per month. Purchase is primarily from mainstream retailers.
- On average, consumers are purchasing 600g of lettuce, which is slightly lower than the previous wave. Recalled last spend was $2.90. Value for money is perceived as relatively good.
- Price tracking revealed an average price of $3.24 per Iceberg lettuce head. This is higher than prices from March 2016.
- There is a high level of awareness of lettuce types, especially Iceberg and Cos.
- The main motivations for purchasing lettuce are health and complementing other food. Already consuming enough and not wanting to waste any are the key barriers to purchase.
- Lettuce is expected to stay fresh for just over a week. Expectations of freshness are met most of the time, consistent with previous wave.

51% of consumers used lettuce in quick meals.

1.

Insight:

Snacking is an increasing meal occasion. Whilst health is a key trigger to purchase.

Short Term Recommendation:

Encourage more lettuce snacking occasions by providing new recipe ideas as well as pre-prepared lettuce snacking options such as spring roll lettuce wraps, san choy bow cups and rice paper roll wraps.

2.

Insight:

Awareness of varieties is low outside of Iceberg and Cos. Domestically, there is a current lack of innovation in this category.

Long Term Recommendation:

Grow awareness of lettuce varieties by offering mixed mini whole lettuce packs, which allow to consumers trial alternative varieties whilst minimising wastage.

Sweet Corn Grower Action Plan.

Wave 38 Fast Facts – Sweet Corn

- Sweet corn holds high consumer sentiment, above the Vegetable Average, whilst future purchase looks to remain stable.
- Purchase frequency of sweet corn is around 4 times per month and on average sweet corn is consumed on 7 occasions per month.
- On average, consumers purchase 0.8kg of sweet corn, with recalled last spend $3.60. Perceived value for money is good (7.0/10), which is higher than the previous wave.
- Analysis of pricing nationally revealed an average price of $1.52 per cob, which has increased since March 2016.
- Awareness of sweet corn remains very low, with the large majority of consumers unable to recall a type.
- Taste and ease of preparation are the primary triggers to purchase. Already consuming enough and not wanting to waste any are the main barriers to purchase.
- Consumers expect sweet corn to remain fresh for approximately 8 days, and this longevity is likely to be met most of the time.

6.9 is the average number of times sweet corn is consumed per month.

1.

Insight:

Corn consumption has increased over the past three waves.

Short Term Recommendation:

Provide recipe ideas and cooking styles on pack highlighting the texture that the vegetable brings to the dish – as texture is driving purchase. Increasing meal occasions will help support the continued consumption frequency of sweet corn.

2.

Insight:

The value of the snack category has increased exponentially over recent years, but is underutilised for sweet corn.

Long Term Recommendation:

Investigate New Product Development (NPD) for sweet corn snacks including fresh microwaveable corn cobs, roasted corn kernel snack tubs and cornmeal.

Green Peas Grower Action Plan.

Wave 38 Fast Facts – Green Peas

- Green peas hold high levels of importance, satisfaction and endorsement, with consumers likely to recommend peas to family and friends. Future purchase intent looks stable.
- Green peas are purchased on average 4 times per month and consumed on 10 occasions per month. Purchase is primarily from mainstream retailers.
- On average, consumers are purchasing 700g of green peas, which is slightly higher than the previous wave. Recalled last spend was $3.90. Green peas are perceived to be good value for money.
- Price tracking revealed an average price of $15.47 per kg of snow peas, which has continued to increase this wave.
- Nearly two thirds of consumers are unable to recall a type of green pea. Snow Peas and Snap Peas have the highest level of recall.
- The main motivations for purchasing green peas are taste and ease of preparation. Already consuming enough and price are the key barriers to purchase.
- Green peas are expected to stay fresh for almost 9 days once purchased. Expectations of freshness are increasingly being met at least most of the time.

22% of consumers do not purchase more green peas as they do not want to waste any.

1.

Insight:

Wastage remains an key barrier to purchase for green peas.

Short Term Recommendation:

Encourage the “stem-to-root” philosophy by educating consumers on using both the pea tendrils and pea pods in dishes. There may be opportunity to supply pea tendrils to mainstream retailers.

2.

Insight:

The “stem-to-root” philosophy has gained traction in the commercial sector.

Long Term Recommendation:

Bring the anti-waste movement to consumers by investigating pea tendril and pod garnish packs. Highlight the high nutritional value of both the tendrils and the pods, such as high levels of vitamin C. This will appeal to Conscious Improver consumers.

Kale Grower Action Plan.

Wave 38 Fast Facts – Kale

- There are high levels of interest in kale, with consumers likely to recommend it to family and friends. There is strong future purchase intent, with over a quarter of consumers indicating they intend to increase the amount they currently purchase.
- On average, kale is purchased 4 times per month, and consumed 9 occasions per month.
- On average, consumers purchase 600g of kale. Value for money is perceived to be fair.
- Analysis of pricing nationally revealed an average price of $4.09 per bunch, consistent with the previous wave.
- Awareness of kale varieties declined this wave, with 64% of consumers are still unable to recall a type.
- Health and nutrition are the primary triggers to purchase. Price and wanting a variety are the main barriers to purchase.
- Consumers expect kale to remain fresh for a week, and this longevity is likely to be met most of the time.

$4.09 per bunch

was the average price for Green Kale in Australia.

1.

Insight:

Price is the main barrier to future purchase of kale, whilst the average national retail price has remained stable over past waves.

Short Term Recommendation:

To overcome the price barrier, quality perceptions need to be heightened in order to justify value for money. Consumers associate quality produce with freshness and being Australian grown. Highlight these attributes at point of sale.

2.

Insight:

Future purchase intent is high, with consumers planning to purchase a greater volume of kale.

Long Term Recommendation:

Provide consumers with increased options when purchasing products that contain kale. Trends overseas include kale chips, wafers, pesto and popcorn.

Leek Grower Action Plan.

Wave 38 Fast Facts – Leek

- Consumer sentiment for leeks are in line with the Vegetable Average.
- Leeks are purchased on average twice per month and consumed four times per month, relatively consistent with the previous wave. Purchase is primarily from mainstream retailers.
- On average consumers are purchasing 700g of leek. Recalled last spend was $3.40, with value for money perceived to be fair. Leeks are typically purchased individually.
- Price tracking revealed an average price of $2.21 per leek, relatively consistent with past waves.
- Awareness of leek types is very low, with 89% of consumers unable to recall a type.
- The main motivations for purchasing leeks are to use as an ingredient in dishes and great taste. Not wanting to waste any and already consuming enough are the key barriers to purchase.
- Leeks are expected to stay fresh for over a week. Expectations of freshness are met most of the time.

25% of consumers used leeks when cooking a new recipe.

1.

Insight:

The winter months see a substantial increase with leeks cooked in soup dishes.

Short Term Recommendation:

Mixed vegetable soup packs that contain leek will appeal to time conscious consumers. Potential to develop seasonal New Product Development (NPD) fresh soup products. Call out number of vegetable servings in each soup to encourage trial.

2.

Insight:

Leek is not regularly purchased by the majority of consumers, and consumption is declining.

Long Term Recommendation:

Review where leeks are stocked in the fresh produce section. Consumers require education about leeks – most importantly, reasons for trial and purchase, such as the versatility of cooking styles, the flavour leeks bring to dishes and what vegetables to accompany with.

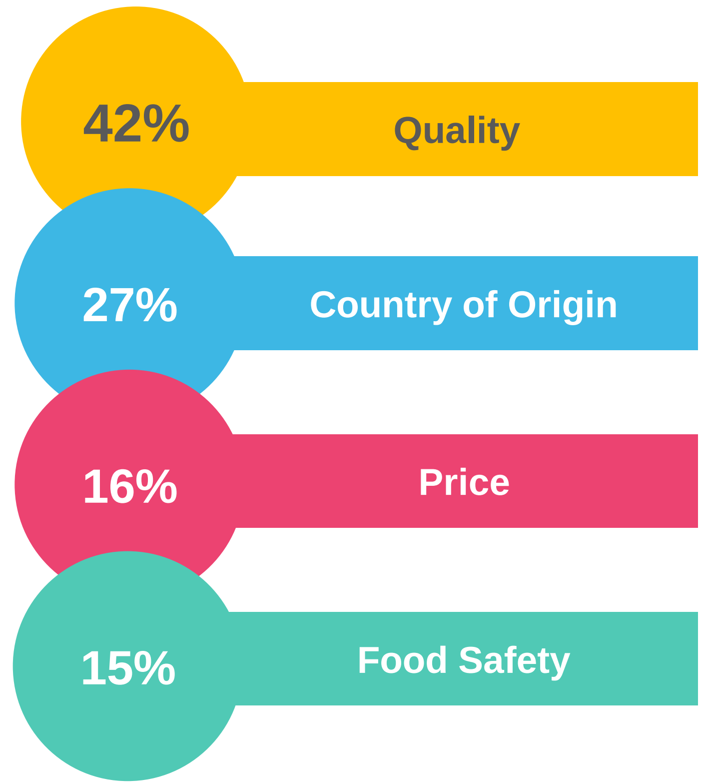
Wave 38:
Response to Ad hoc Questions

Quality is the most important attribute when shopping for fresh vegetables.

Since 2014, the importance of country of origin and price has increased.

Whilst food safety is least important to consumers, it is mostly likely a hygiene factor for Australian consumers.

Purchase Priority



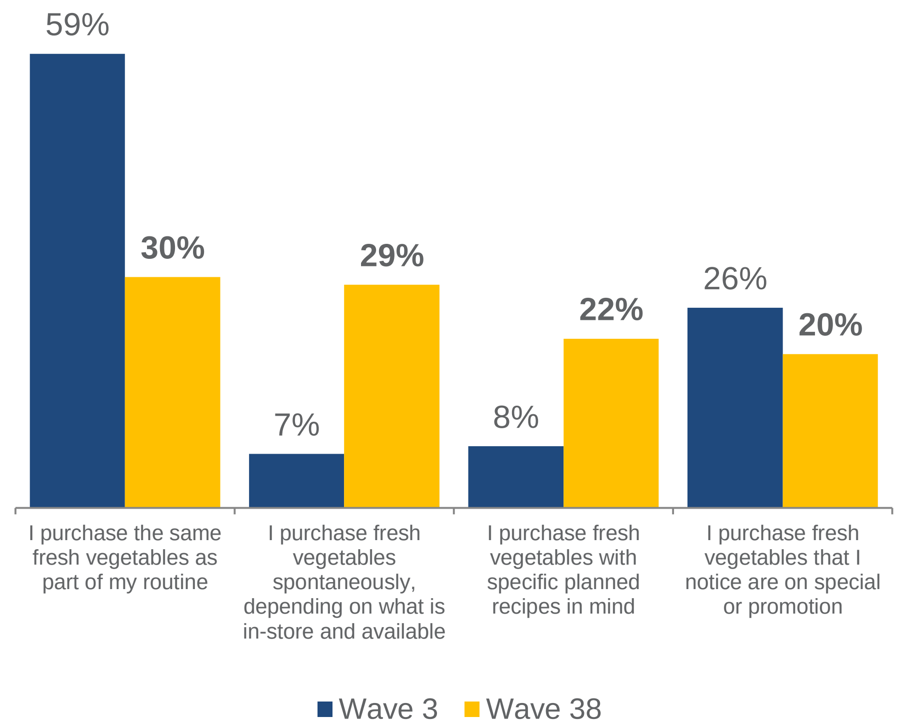
AH1. Please rank the following in order of priority when shopping for fresh vegetables, from most important (1) to least important (4).
Total Respondents N=610

Consumers have significantly changed the way they are shopping for fresh vegetables since 2013.

Purchasing fresh produce as part of their routine has significantly declined, but still remained the primary behaviour.

There were significant increases in purchase of fresh vegetables spontaneously depending on what was available in-store, as well as purchasing vegetables with specific planned recipes in mind.

Purchase Behaviour



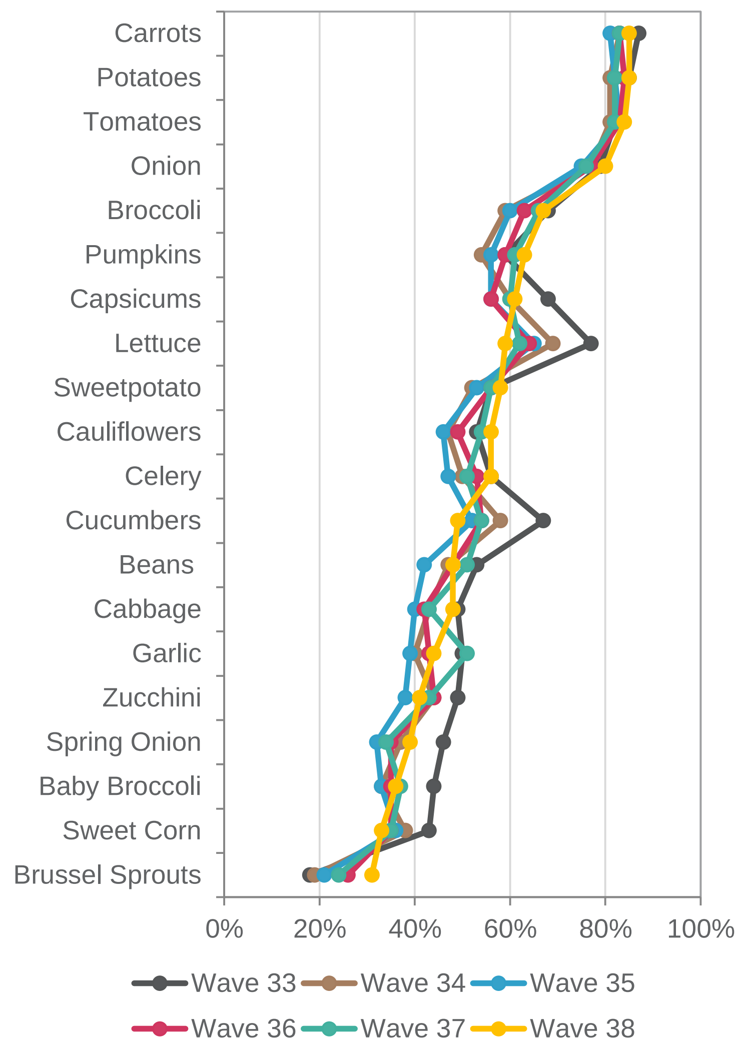
AH2. Thinking about when you usually do the grocery shopping, which statement best describes you?
Total Respondents N=610

Wave 38: Overall Vegetable Tracking

Top 20 Vegetables Purchased Last Month

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

The biggest decline in purchase this month were for garlic and cucumbers, whereas the largest increase was for Brussels sprouts, celery, cabbage and spring onion.



Sample Wave 38 N=1239 *(base in higher as Q appears in Screener)*
S8. Which of the following fresh vegetables have you purchased in the last month?

Category Health Explained.

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

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

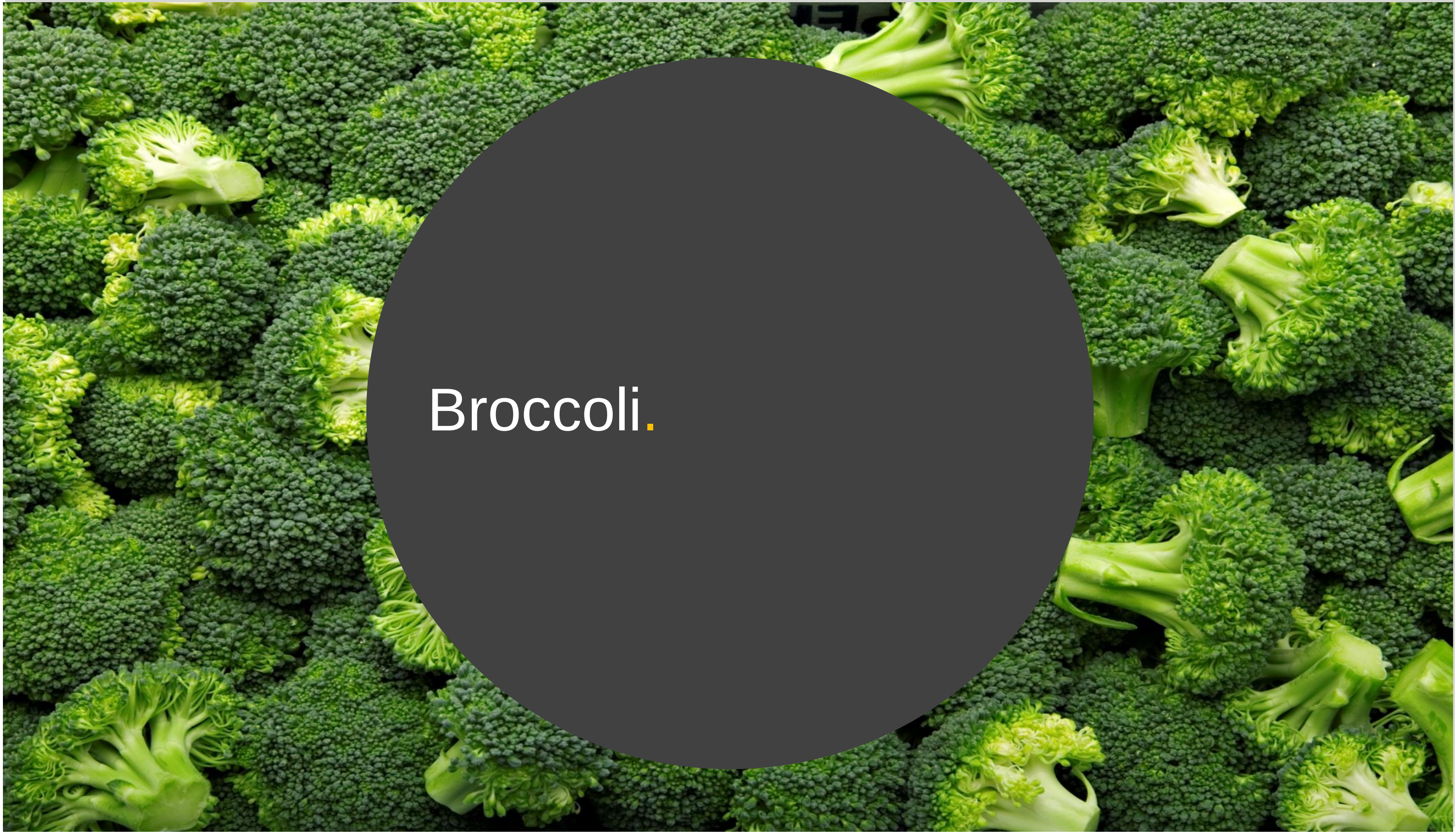
- How **important** to you is having a range of *commodity* available in the store where you usually shop?
- How **satisfied** or dissatisfied are you with the range of *commodity* currently available?
- How likely would you be to **recommend** *commodity* to your family and friends?
- How interested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

Category health and consumer sentiment remains strong across all vegetables. Consumer satisfaction is particularly high for broccoli and lettuce compared with the Vegetable Average.

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

	Broccoli	Chillies	Lettuce	Sweet Corn	Green Peas	Kale	Leek	Vegetable Average
Importance	6.4	7.1	6.9	7.0	7.3	6.3	6.2	6.4
Satisfaction	7.4	6.8	7.4	7.3	7.2	6.4	6.6	6.7
Endorsement	7.3	7.2	7.0	7.6	7.4	7.1	6.9	7.0
Interest (New Varieties)	6.1	7.1	6.1	6.7	7.0	6.7	6.2	6.3
Future Purchase								
More	10%	23%	10%	13%	16%	27%	9%	16%
Same	90%	75%	88%	86%	82%	68%	91%	83%
Less	0%	2%	2%	1%	2%	5%	1%	1%

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



Broccoli.

Broccoli consumption and purchase frequency both increased this wave.

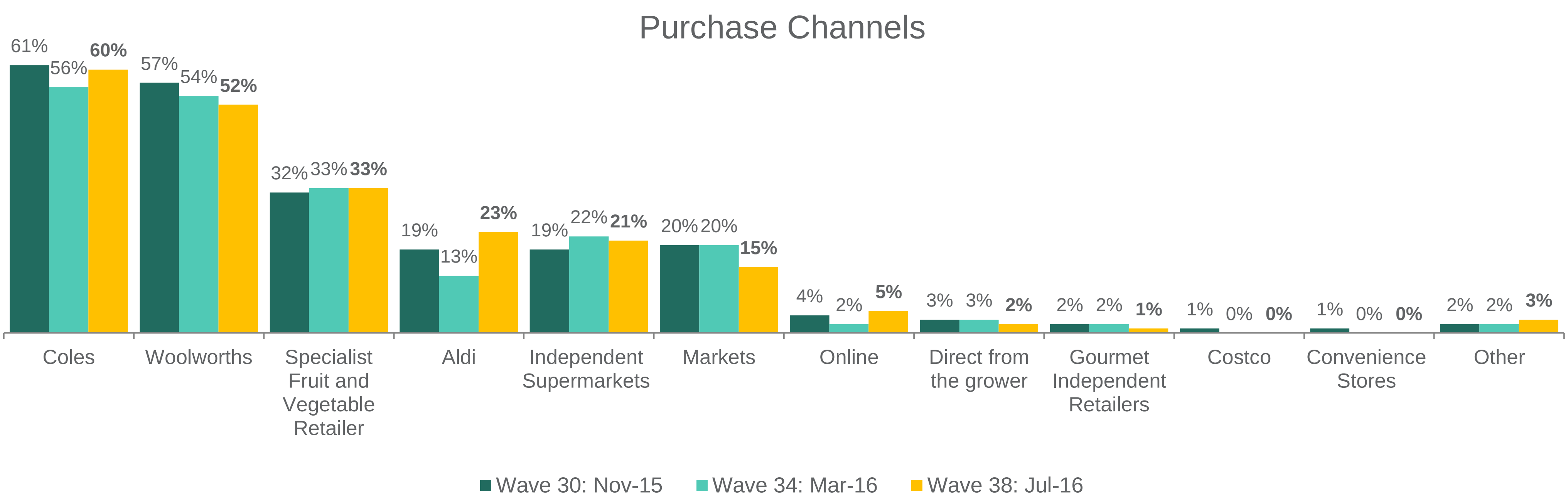
Purchase is typically from mainstream retailers, with specialist vegetable retailers also a popular channel. This wave sees an increase in purchase from Aldi.

Average Purchase **4.1** times per month

- 4.1 times, Wave 30
- ▼ 3.9 times, Wave 34

Average Consumption **10.3** times per month

- ▲ 10.5 times, Wave 30
- ▼ 9.5 times, Wave 34



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 30 N=302, Wave 34 N=303, Wave 38 N=302

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

Average Spend and Price Sensitivity.

Average weight of purchase

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

▲ 800g, Wave 30
▲ 800g, Wave 34

Recalled last spend

The average recalled last spend in July was **$3.50**, which has marginally increased for this wave.

▼ $3.40, Wave 30
▼ $3.30, Wave 34

Value for money

On average, consumers perceived broccoli to be relatively good value for money **(6.2/10)** which has slightly declined this wave.

▲ 6.4/10, Wave 30
▲ 6.4/10, Wave 34

Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample: Wave 30 N=302, Wave 34 N=303, Wave 38 N=302

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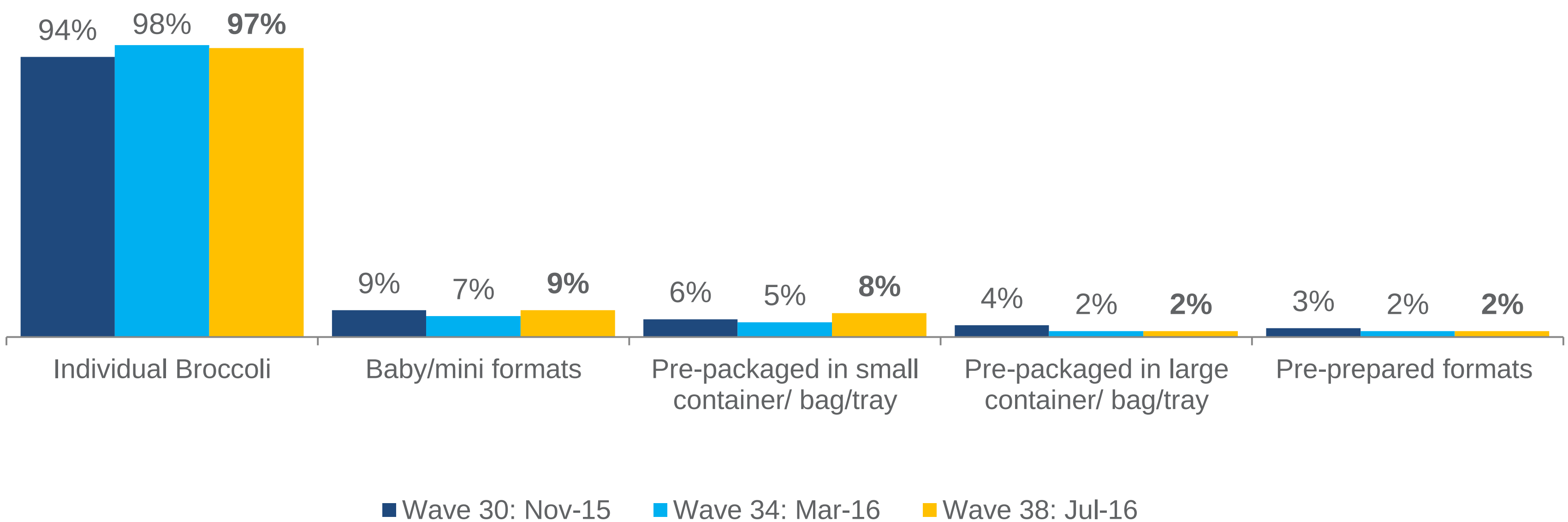
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

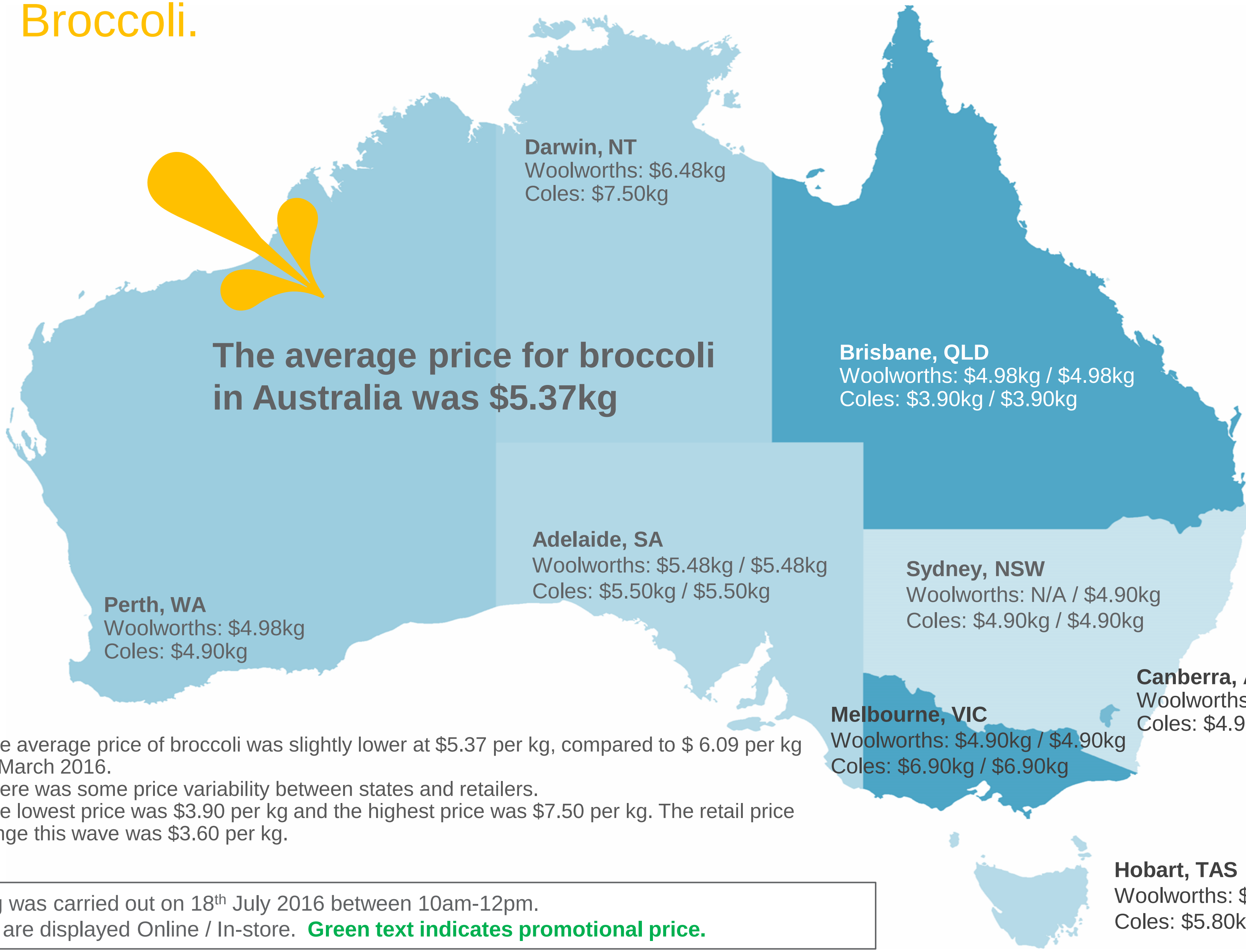
Individual broccoli heads are the main format purchased by consumers. Pre-packaged formats in small and large containers, bags and trays are also purchased options.



Q4b In what fresh formats do you typically purchase Broccoli?
Sample: Wave 30 N=302, Wave 34 N=303, Wave 38 N=302

Online and In-store Commodity Prices.

Broccoli.

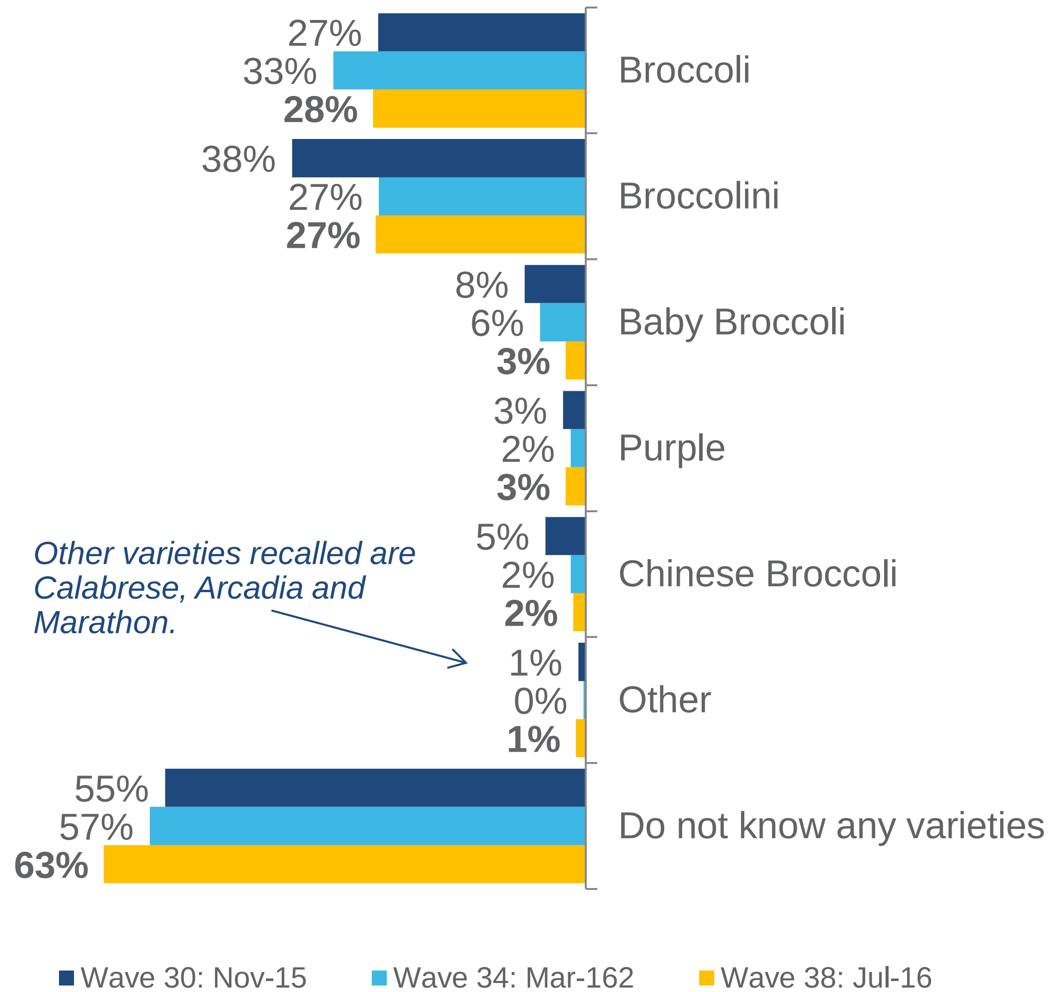


- The average price of broccoli was slightly lower at $5.37 per kg, compared to $ 6.09 per kg in March 2016.
- There was some price variability between states and retailers.
- The lowest price was $3.90 per kg and the highest price was $7.50 per kg. The retail price range this wave was $3.60 per kg.

Pricing was carried out on 18th July 2016 between 10am-12pm.
Prices are displayed Online / In-store. **Green text indicates promotional price.**

Awareness of broccoli types has declined over the last three waves.

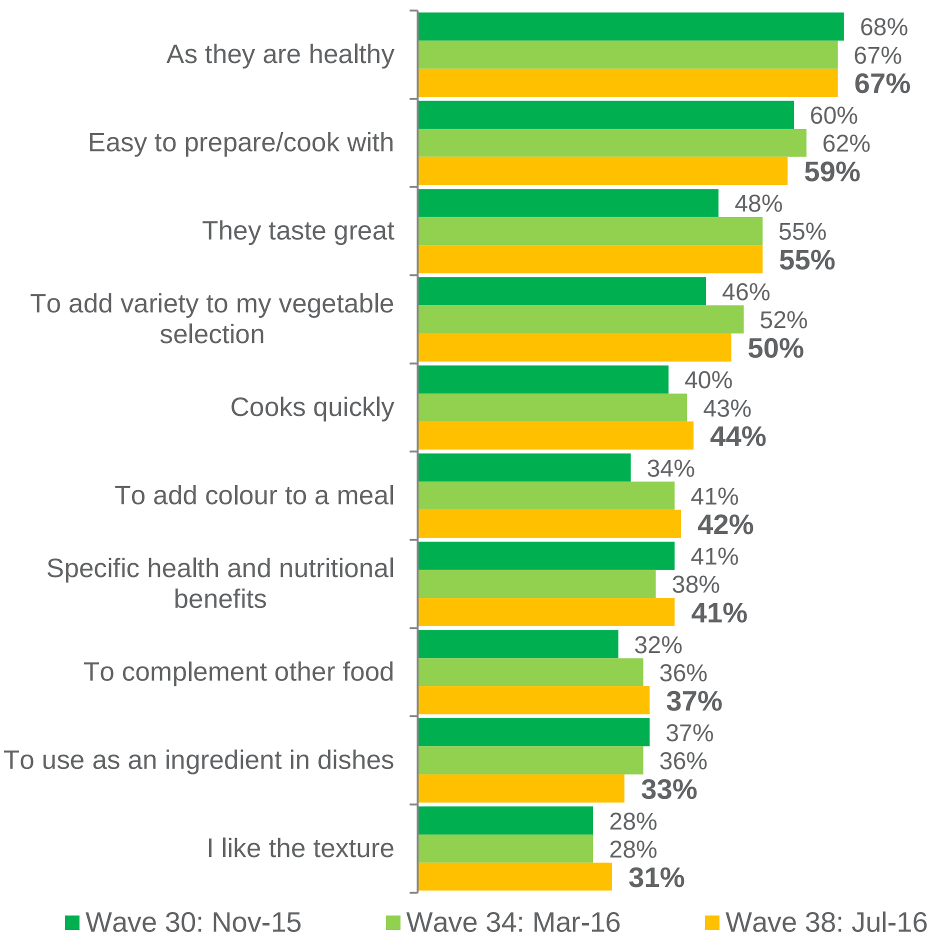
Consumers recall generic names, such as ‘broccoli’, and also ‘Broccolini’, with very few consumers able to name specific types.



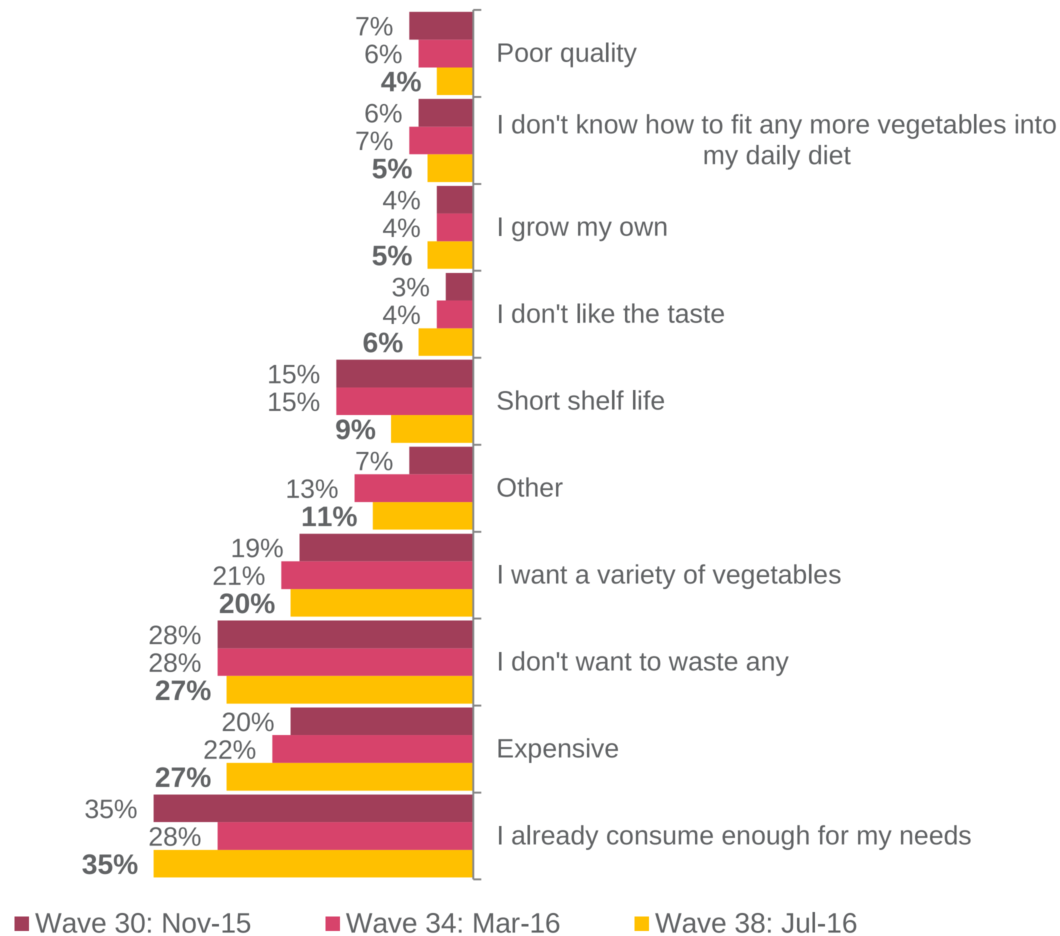
Q6a. What varieties of <commodity> are you aware of? (unprompted)
Sample: Wave 30 N=302, Wave 34 N=303, Wave 38 N=302

Health and convenience continue to be the main influences on broccoli purchase. The main barriers to purchase are already consuming enough and price.

Triggers



Barriers



Q7. Which of the following reasons best describes why you purchase <commodity>?
Q8. Which reason best describes why you don't buy <commodity> more often?
Sample: Wave 30 N=302, Wave 34 N=303, Wave 38 N=302

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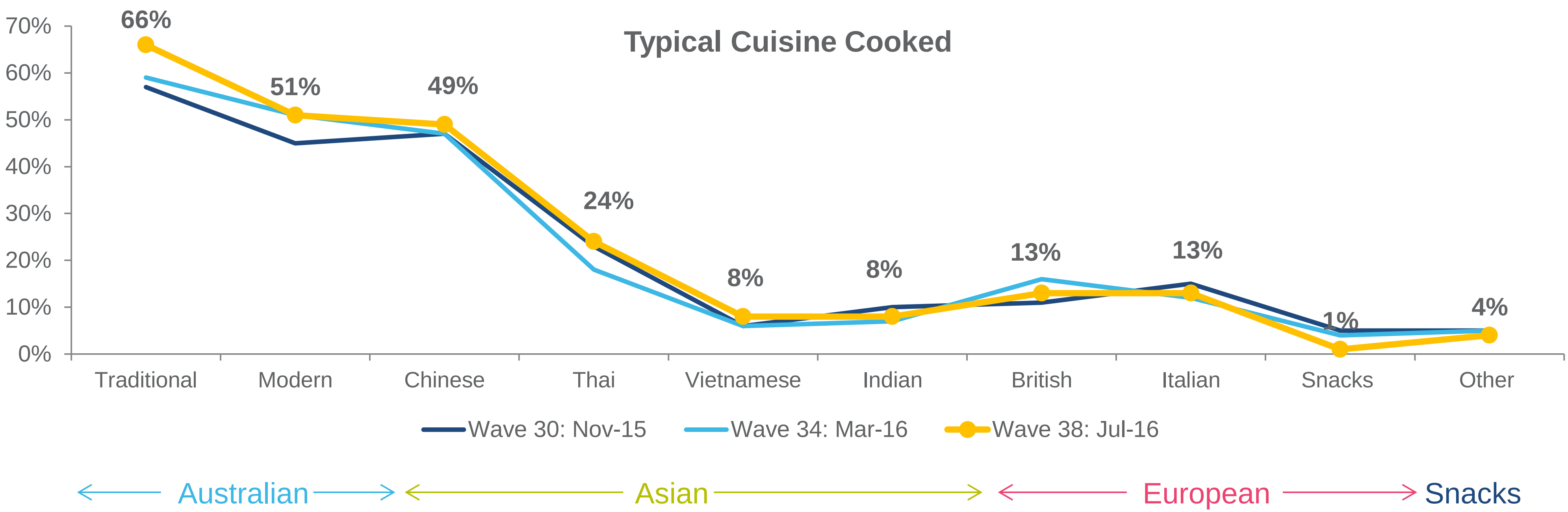
Dinner is the main meal occasion for broccoli consumption. Cuisines typically cooked remain relatively consistent this wave, with Australian and Chinese cuisines being most popular.

Top 5 Consumption Occasions

	Wave 34	Wave 38
Dinner	79%	**79%**
Family meals	59%	**60%**
Weekday meals	50%	**56%**
Weekend meals	40%	**49%**
Quick Meals	35%	**28%**

10% used broccoli when cooking a new recipe

▲ 11%, Wave 34



Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?
Sample: Wave 30 N=302, Wave 34 N=303, Wave 38 N=302

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

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

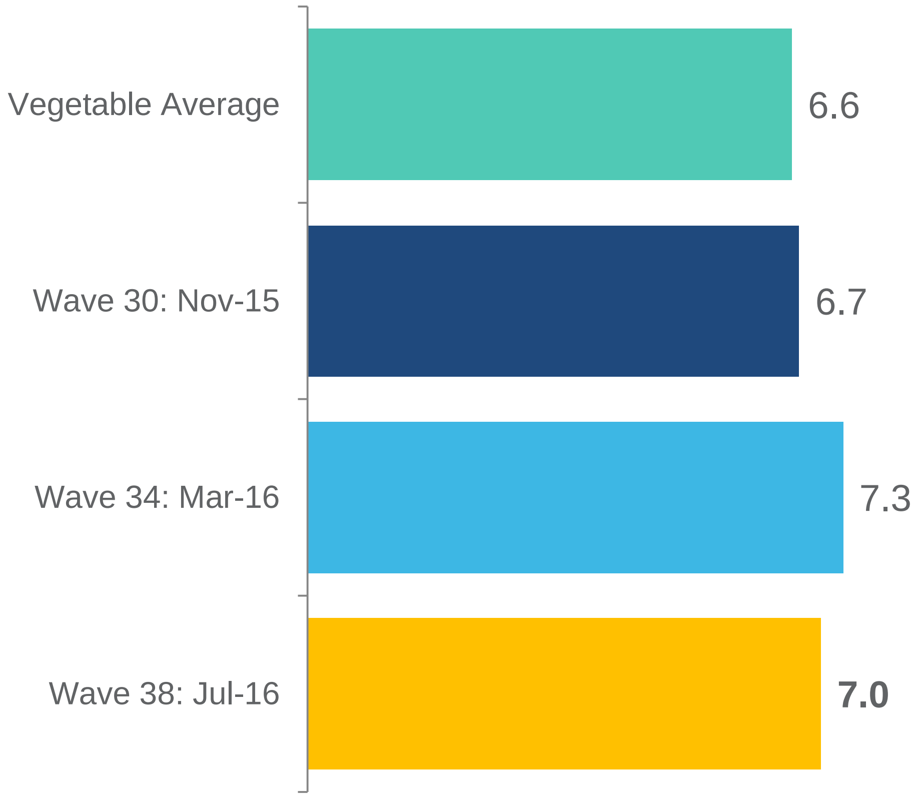
Accompanying Vegetables

Carrot	70%
Potato	63%
Cauliflower	39%
Sweet Potato	34%
Pumpkin	31%

Top 10 Cooking Styles			
	Wave 30	Wave 34	**Wave 38**
Steaming	68%	67%	**66%**
Stir frying	47%	47%	**51%**
Boiling	36%	35%	**32%**
Microwave	26%	25%	**26%**
Soup	13%	15%	**14%**
Sautéing	10%	11%	**11%**
Raw	10%	9%	**9%**
Frying	9%	7%	**8%**
Slow Cooking	7%	10%	**6%**
Roasting	6%	6%	**5%**

Q9. How do you typically cook <commodity>?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
Sample: Wave 30 N=302, Wave 34 N=303, Wave 38 N=302

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



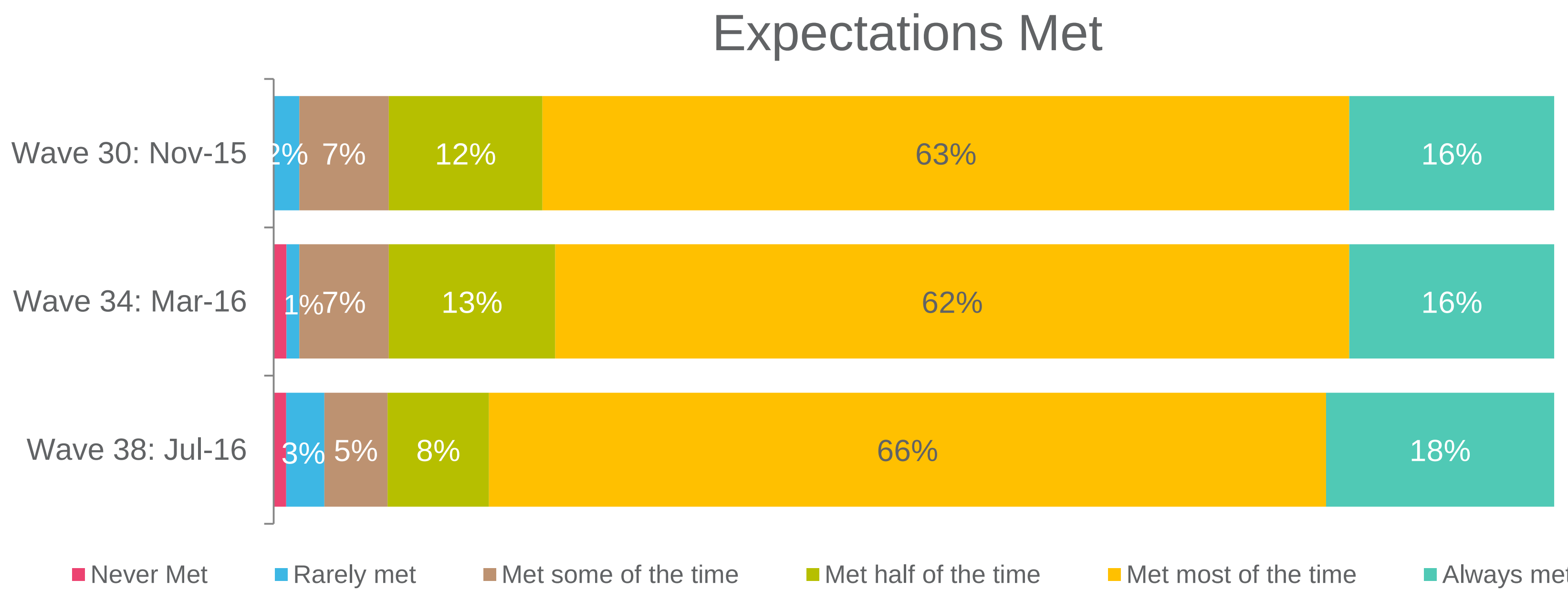
8.2

Q14. When purchasing <commodity>, how important is Provenance to you?
Q15. And when purchasing Chillies, how important is that it is grown in Australia?
Sample: Wave 30 N=302, Wave 34 N=303, Wave 38 N=302

Broccoli is expected to stay fresh for just over a week, which has marginally increased this wave. Expectations of freshness are increasingly being met at least most of the time.

Expected to stay fresh for **8.2** days

▼ 7.7 days, Wave 30
▼ 7.7 days, Wave 34



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 30 N=302, Wave 34 N=303, Wave 38 N=302

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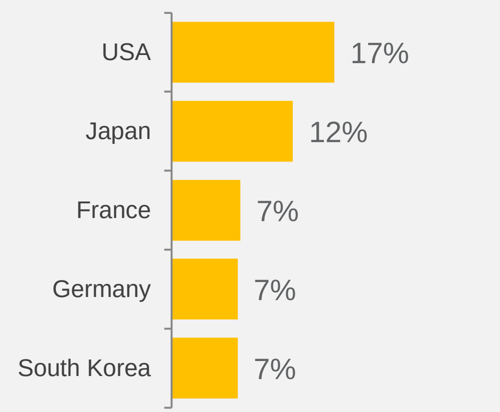
Broccoli Product Launch Trends.

Broccoli Global Launches

April – July 2016

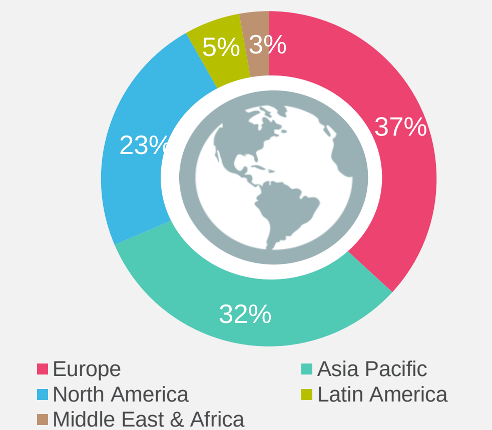
There were 353 new broccoli products launched globally over the last 3 months. Top categories for launch were meals and fruit & vegetables. These launches occurred primarily across Europe and Asia Pacific.

Country

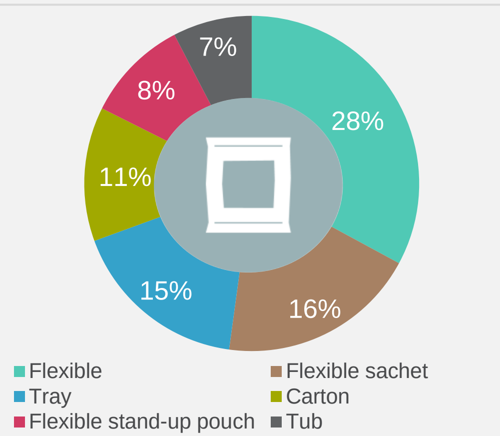


353 Global NPDs

Region



Top Pack Formats



Categories

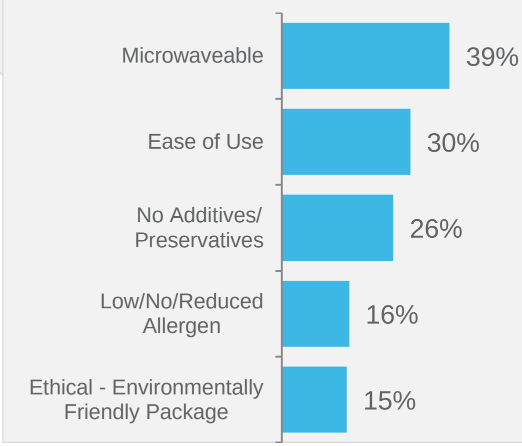
Meals 24%

Fruits & Vegetables 19%

Skincare 13%

Baby Food 9%

Top Claims



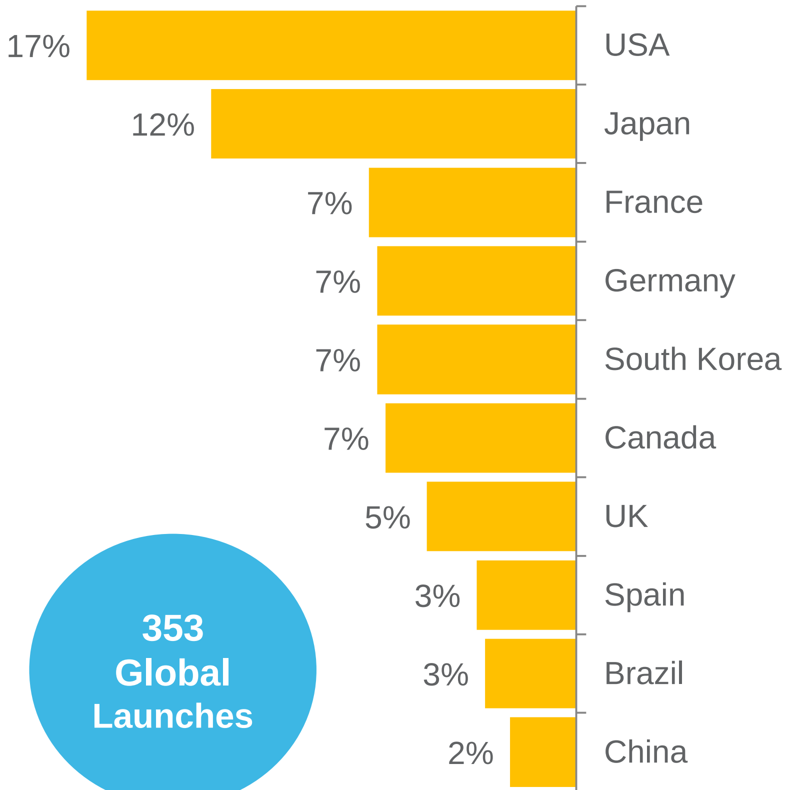
Broccoli Product Launches:
Last 3 Months (April – July 2016)
Summary

- A total of 353 products containing broccoli as an ingredient were launched globally within the last 3 months, which is consistent with the previous wave.
- There was only 1 product containing broccoli launched in Australia in the past 3 months (see upcoming slide for more detail).
- Europe (37%) and Asia Pacific (32%) were the top regions for broccoli product launches.
- Flexible pack formats (28%) are the predominant form of packaging for launches in the last 3 months. This is consistent with the previous waves.
- The top categories for launches were meals (24%), fruit and vegetable products (19%), and skincare (13%).
- The core claims used for launches centred around convenience and health, with microwaveable being the top claim (39%), ease of use (30%) and no additives or preservatives (26%).
- The most innovative launch found was Broccoli Cubes in Italy (see upcoming slides for more detail).

Source: Mintel (2016)

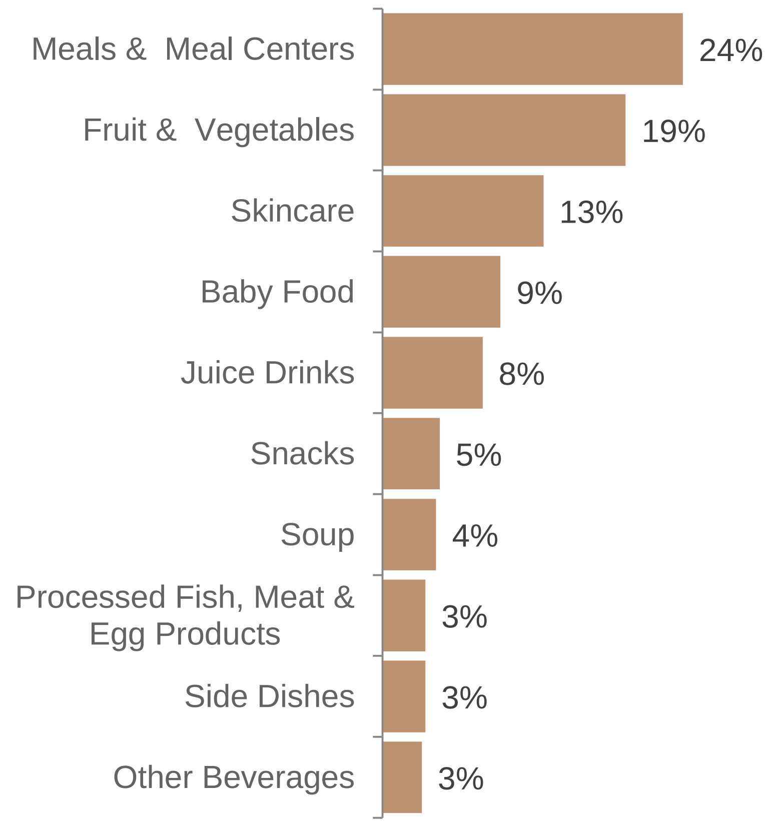
USA was the dominant country for broccoli product launches, consistent with the previous wave. Meals & meal centers and fruit & vegetables were the main product categories.

Top Launch Countries



353 Global Launches

Top Launch Categories



Microwaveable is the most used claim on broccoli products, with ease of use and no additives/preservatives also popular claims. Flexible packaging is the most utilised format globally, consistent with past waves.

Pack Formats Used

Global	Flexible	28%
	Flexible sachet	16%
	Tray	15%

Top Claims Used

Global	Microwaveable	39%
	Ease of Use	30%
	No Additives/Preservatives	26%

Innovative Broccoli Launches:
L3M (April – July 2016)

Tai Pei Chicken & Broccoli (USA)

Tai Pei Chicken & Broccoli has been relaunched. This USDA certified, microwaveable product comprises breaded chicken and vegetables in Asian style sauce with steamed rice. It retails in a newly designed 14-oz. recyclable pack, bearing the Facebook logo and a QR code

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

Mann's Three Generations Summer Fun Vegetable Tray with Creamy Ranch Dip (Canada)

Mann's Three Generations Summer Fun Vegetable Tray with Creamy Ranch Dip has been relaunched with a new brand name, and now comes in a newly designed pack containing 425g of vegetables and 85g of dip. This washed and ready-to-eat product is comprised of carrots, tomatoes, celery, broccoli, sugar snap peas, and a creamy ranch dip.

Claims:
Ease of Use

Luvskin Super Food Green Mask Sheet (Vietnam)

Luvskin Mat Na Duong Am Thuc Pham Xanh Cao Cap (Super Food Green Mask Sheet) is formulated with green super food extracts such as melon, aloe, broccoli and kiwi, and is claimed to remove toxins and calm sensitive skin, while providing moisture. The product retails in a 20ml pack.

Claims:
Botanical/Herbal, Moisturising / Hydrating, For Sensitive Skin

Paren Friarielli Broccoli Cubes (Italy)

Paren Friarielli a Cubetti (Friarielli Broccoli Cubes) are new to the range. These cubes have been sourced from integrated farming production, a method that selects and limits the usage of chemical compounds and integrates environmentally-friendly practices to obtain a final product with a residual pesticide which is under the analytic threshold.

Claims:
Ethical - Environmentally Friendly Product

Source: Mintel (2016)

Innovative Broccoli Launches:
L3M (April – July 2016)

Ready To Cook Fresh Rustic Style Vegetables (Germany)

Ready To Cook Frisches Gemüse Rustikal (Fresh Rustic Style Vegetables) have been washed and comprise broccoli, bell pepper, zucchini, carrots and rosemary. This ready-to-cook product retails in a 400g pack featuring a tasty recipe suggestion.

Claims:
Ease of Use

Ito En Daily Green Juice Powder (Japan)

Ito En Daily Green Juice Powder has been relaunched. It is now made from domestically produced more than 30 young barley leaves, green tea leaves, broccoli, spinach and kale. This product contains soya milk, honey and calcium to offer a delicious flavour. It is to be diluted with water and retails in a 75g pack with a resealable zip, featuring a QR code.

Claims:
Convenient Packaging

So Fine Broccoli Burgers (Germany)

So Fine Broccoli Burgers are rich in broccoli. The 100% vegan and vegetarian product is said to be easy to use, and to be better for humans, animals and the planet. It is crisp and tender, can be prepared in the frying pan or oven, and retails in a 170g pack containing 2 x 85g units and bearing the Facebook logo.

Claims:
Vegetarian, Ethical - Environmentally Friendly Product, Ethical - Animal, Vegan, Ease of Use, No Animal Ingredients, Social Media

BOL Salad Jar The Japanese Salad (UK)

BOL Salad Jar The Japanese Salad comprises cooked black rice, raw slaw, edamame beans, black beans, tender stem broccoli with a soy, white miso and ginger dressing. The vegetarian suitable product retails in a 300g pack featuring the Facebook, Instagram and Twitter logos, and containing a fork.

Claims:
Vegetarian, Social Media

Source: Mintel (2016)

Innovative Broccoli Launches:
L3M (April – July 2016)

Mniam Mniam Dumplings with Chicken and Broccoli (Poland)

Mniam Mniam Pierogi z Kurczakiem i Brokulami (Dumplings with Chicken and Broccoli) are now available. The microwaveable product is 100% natural, and does not contain flavour enhancers, colours or preservatives. It retails in a 400g pack featuring a Facebook URL.

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

Javara Broccoli Gourmet Noodles (Indonesia)

Javara Mi Brokoli (Broccoli Gourmet Noodles) have been repackaged in an updated design 200g pack bearing the Facebook and Instagram links, and featuring cooking instructions. This vegan product is made from natural ingredients without any added eggs, naturally grown broccoli combined with other locally grown ingredients. The noodle is said to be a perfect diet for vegetarians; and is free from additives, GMO ingredients, preservatives, colours and MSG.

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

Thiriet 100% Broccoli Puree (France)

Thiriet Purée 100% Brocolis (100% Broccoli Puree) has been repackaged in a newly designed pack. It is made with 100% broccoli from France and contains no fats or seasonings, and is naturally low in salt. This microwavable product is said to be easy to prepare and retails in a newly designed 1kg pack featuring preparation instructions.

Claims:
Low/No/Reduced Fat, Microwaveable, Low/No/Reduced Sodium, Ease of Use

Nurturme Cheddar and Broccoli Quinoa Squares (Hong Kong)

Nurturme Cheddar and Broccoli Quinoa Squares are described as easily dissolvable wholegrain and organic puffed crackers. They contain a complete protein, and are free from gluten, added sugar or preservatives. The quinoa squares are made from 100% protein-packed supergrain to help grow superkids; contain organic broccoli full of fibre, vitamins and minerals; yummy organic orange cheddar made from cow's milk; and coconut oil, a healthy, nutrient-rich superfood that aids in digestion.

Claims:
No Additives/Preservatives, Kosher, Low/No/Reduced Sugar, Organic, Babies & Toddlers (0-4), Gluten-Free, Wholegrain, Digestive (Functional), Low/No/Reduced Allergen, Ethical - Environmentally Friendly Package, Ethical - Charity, On-the-Go, Ease of Use

Source: Mintel (2016)

Australian Broccoli Launches:
L3M (April – July 2016)

Sephora Pomegranate Mask

Sephora Pomegranate Mask is enriched with natural pomegranate fruit extract said to reduce the signs of fatigue and awaken and tone skin, leaving it energetic, fresh and radiant. According to the manufacturer, this fibre mask adapts perfectly to the contours of the face ensuring optimal interaction of active ingredients with the skin. It has been dermatologically tested, is easy to use and retails in a 24g pack.

Claims:
Botanical/Herbal, Dermatologically Tested, Brightening / Illuminating*, Toning*, Ease of Use

Chillies.

Consumption frequency has continued to increase this wave, whilst purchase frequency declined.

Coles and Woolworths remain the primary purchase channels for chillies, with specialist retailers seeing a noticeable increase this wave.

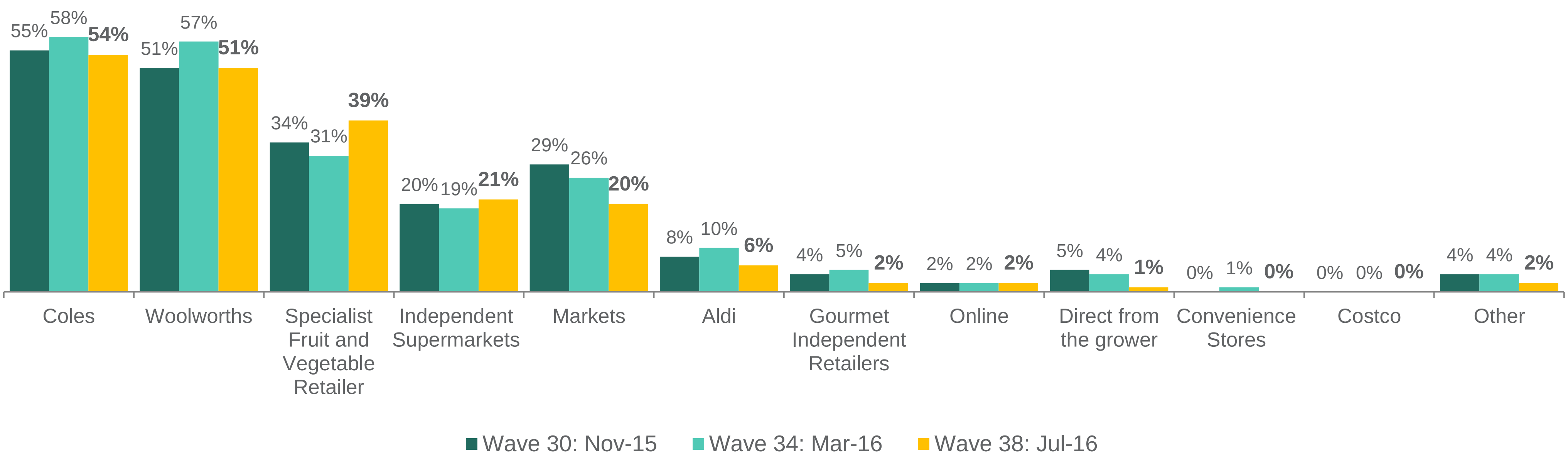
Average Purchase **3.2** times per month

▲ 3.7 times, Wave 30
▲ 3.7 times, Wave 34

Average Consumption **12.0** times per month

▼ 10.4 times, Wave 30
▼ 11.1 times, Wave 34

Purchase Channels



Q1. On average, how often do you purchase <commodity>?
Q2. On average, how often do you consume <commodity>?
Q5. From which of the following channels do you typically purchase <commodity>?
Sample Wave 30 N=204, Wave 34 N=202, Wave 38 N=203

Average Spend and Price Sensitivity.

Average weight of purchase

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

— 300g, Wave 30
— 300g, Wave 34

Recalled last spend

Recalled last spend on chilli purchase was **$3.80**, relatively consistent with the previous waves.

▲ $4.00, Wave 30
▲ $3.90, Wave 34

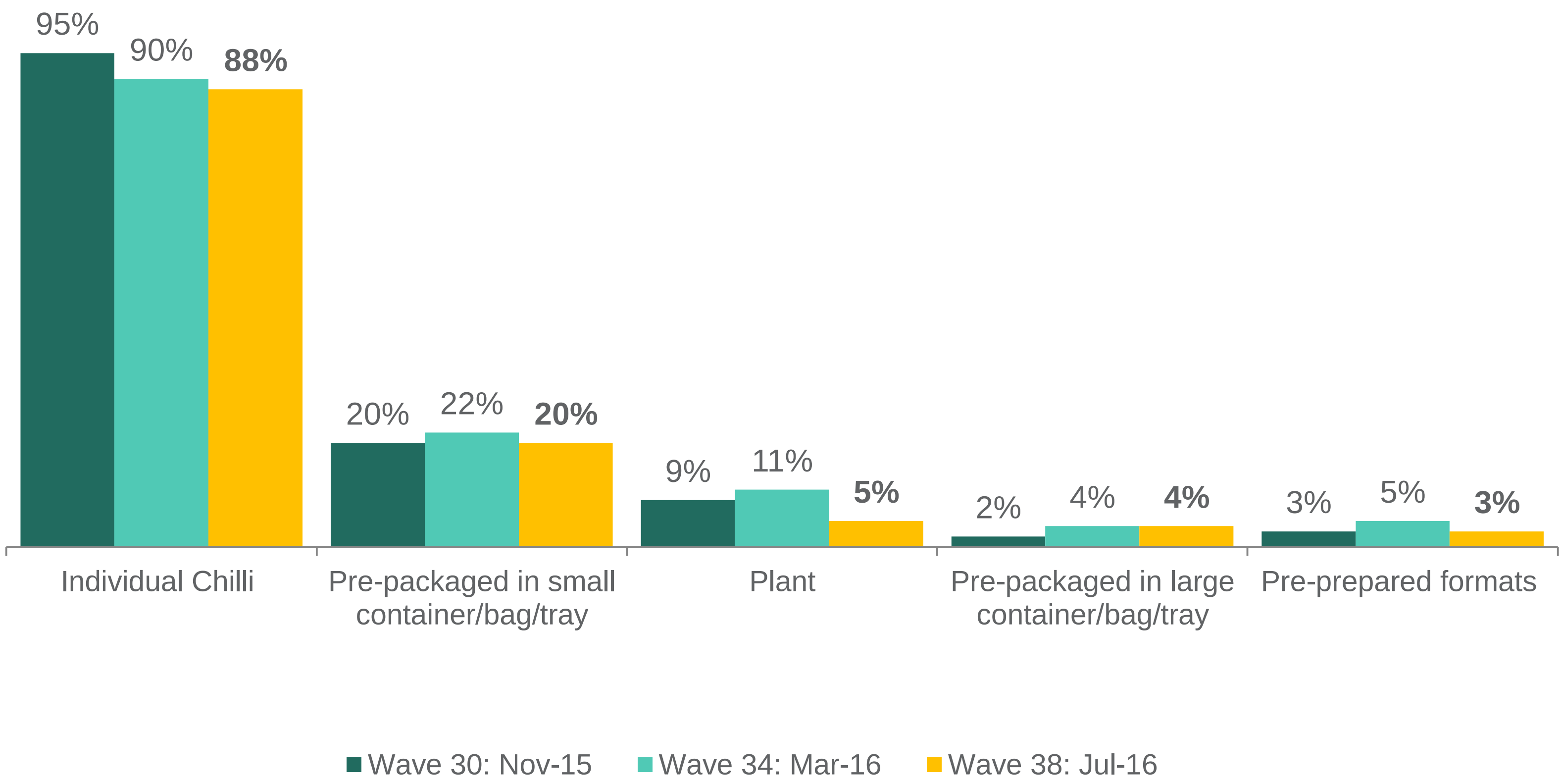
Value for money

Consumers' perceived value for money was relatively good **(6.3/10)**, which has slightly increased this wave.

▲ 6.4/10, Wave 30
▼ 6.1/10, Wave 34

Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? *0-10 scale*
Sample Wave 30 N=204, Wave 34 N=202, Wave 38 N=203

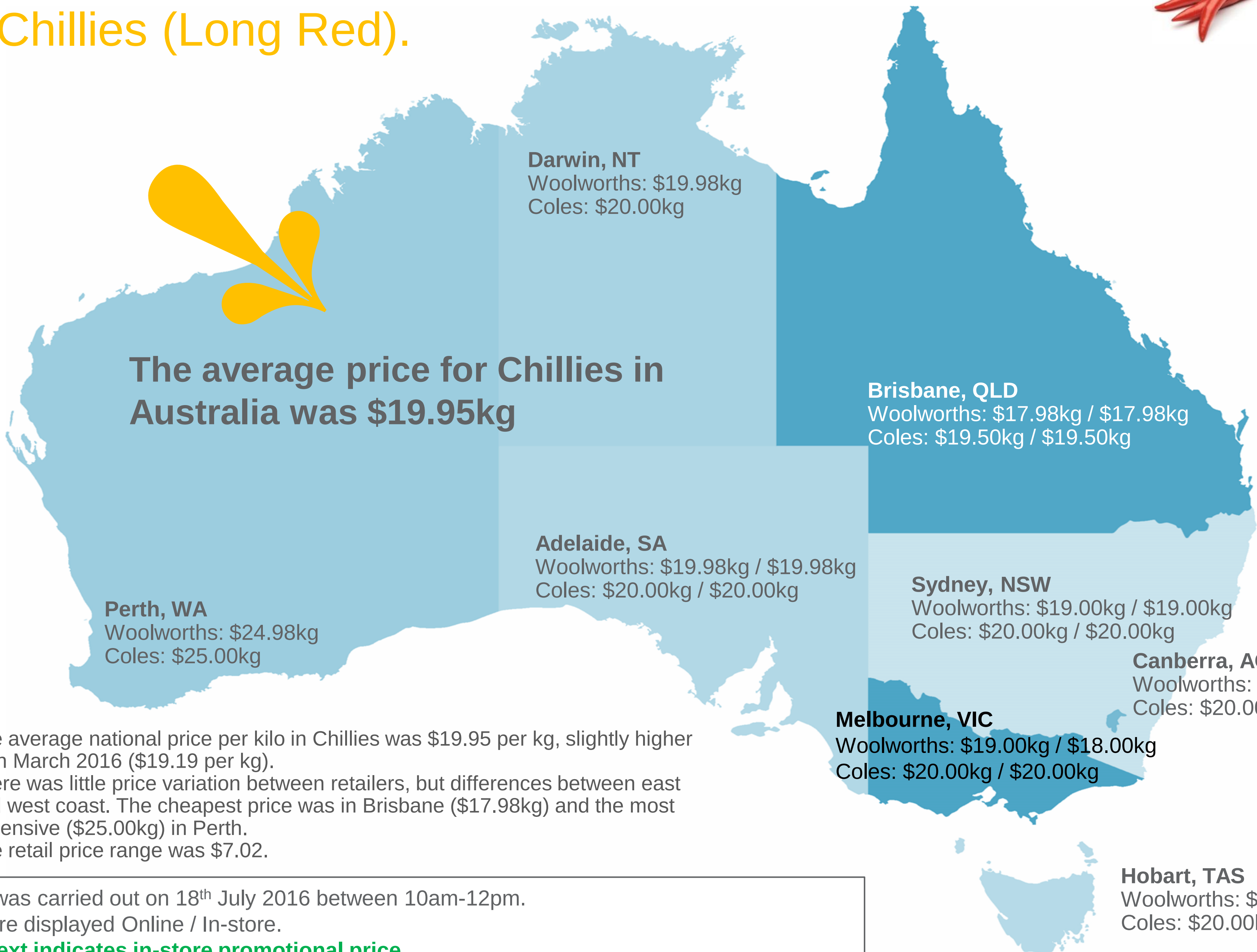
Individual chillies are the main format purchased, followed by pre-packaged small trays.



Q4b In what fresh formats do you typically purchase Chillies?
Sample Wave 30 N=204, Wave 34 N=202, Wave 38 N=203

Online and In-store Commodity Prices.

Chillies (Long Red).

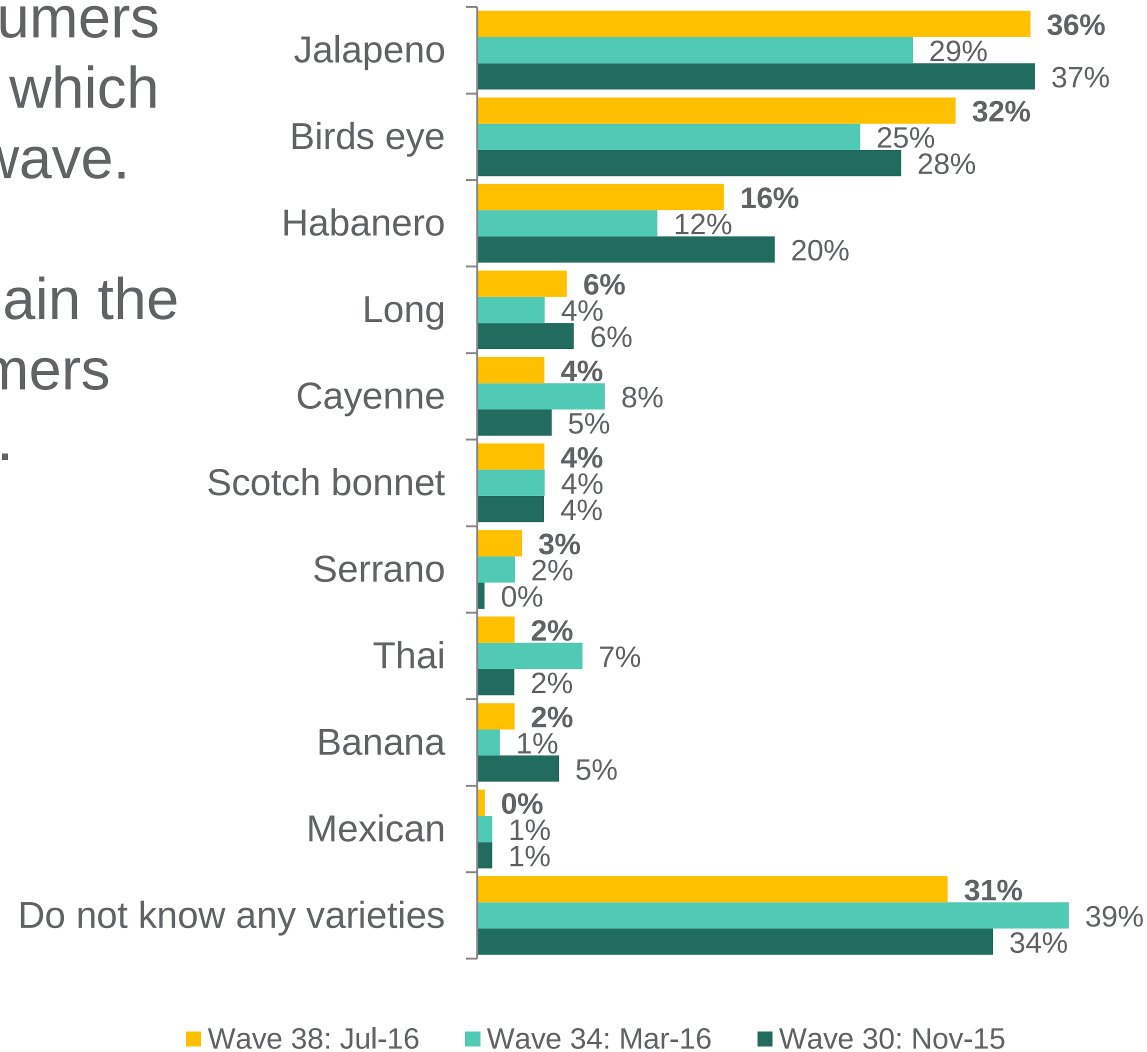


- The average national price per kilo in Chillies was $19.95 per kg, slightly higher than March 2016 ($19.19 per kg).
- There was little price variation between retailers, but differences between east and west coast. The cheapest price was in Brisbane ($17.98kg) and the most expensive ($25.00kg) in Perth.
- The retail price range was $7.02.

Pricing was carried out on 18th July 2016 between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates in-store promotional price.

Just under one third of consumers cannot recall a type of chilli, which has slightly decreased this wave.

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

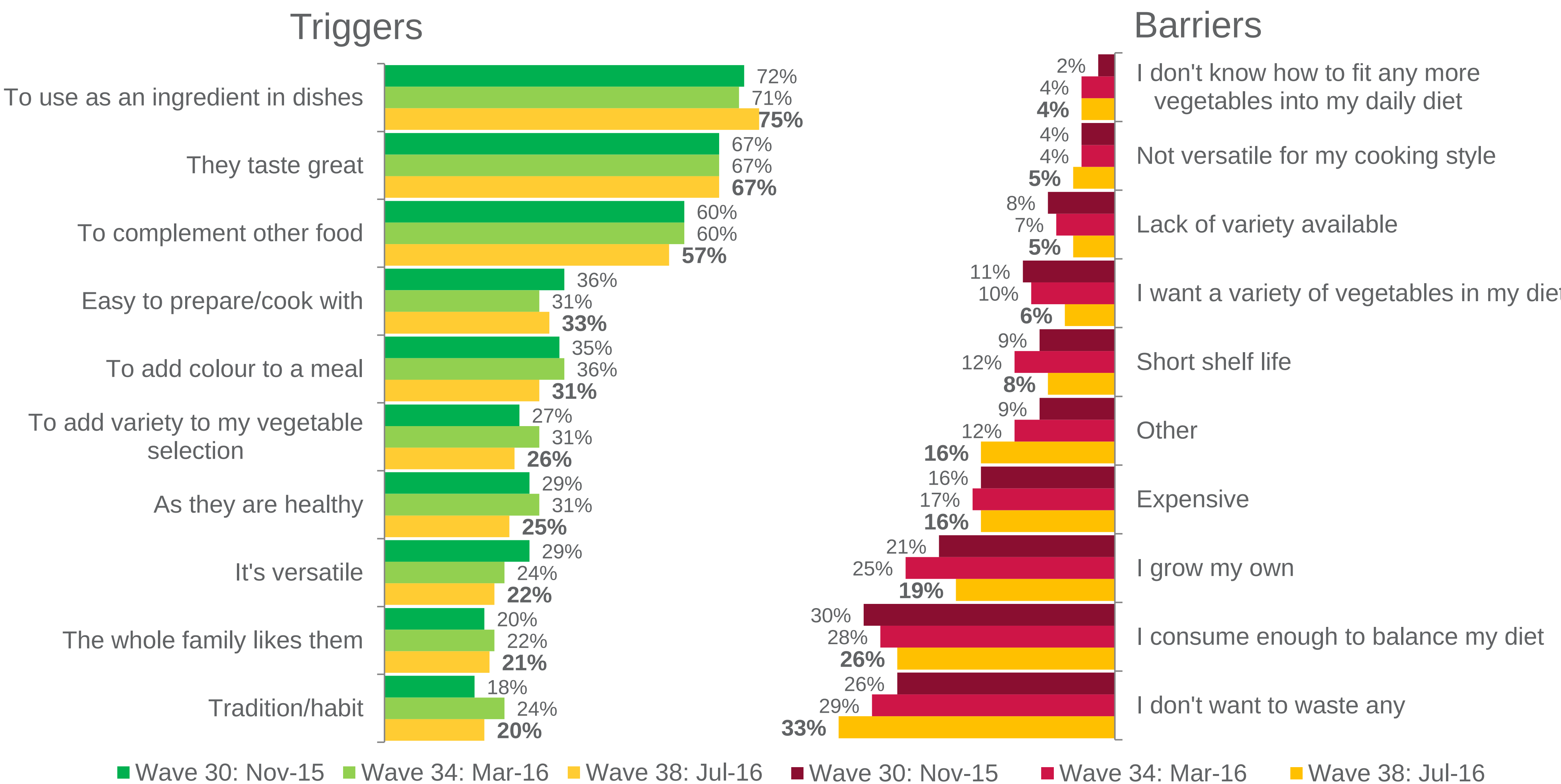


Red 26% **Green 25%** **Yellow 2%**

Chilli colour recall

Q6a. What types/varieties of <commodity> are you aware of? (unprompted)
Sample Wave 30 N=204, Wave 34 N=202, Wave 38 N=203

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



Q7. Which of the following reasons best describes why you purchase <commodity> ?
Q8. Which reason best describes why you don't buy <commodity> more often?
Sample Wave 30 N=204, Wave 34 N=202, Wave 38 N=203

Horticulture Innovation Australia

colmar brunton.

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

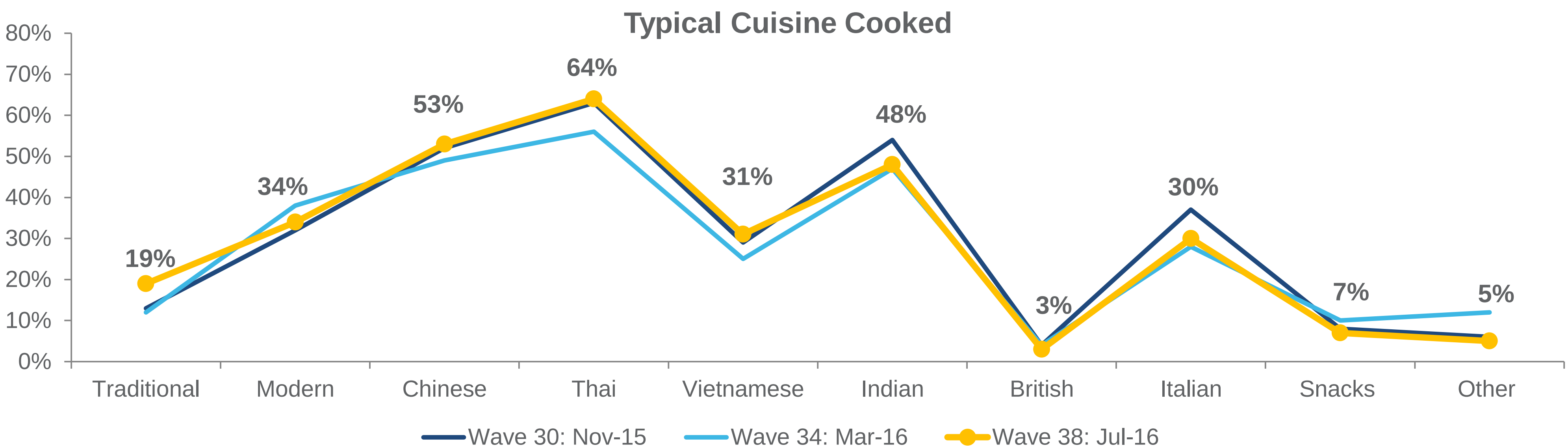
Consumers are typically eating chillies for dinner. Chillies are also popular when cooking new recipes.

Top 5 Consumption Occasions

	Wave 34	Wave 38
Dinner	74%	**75%**
Family meals	59%	**65%**
Weekend meals	51%	**56%**
Weekday meals	51%	**54%**
Quick Meals	44%	**42%**

30% used chillies when cooking a new recipe

▲ 31%, Wave 34



Australian — Asian — European — Snacks

Q10. What cuisines do you cook/consume that use <commodity> ?
Q11. Which of the following occasions do you typically consume/use <commodity> ?
Sample Wave 30 N=204, Wave 34 N=202, Wave 38 N=203

Horticulture Innovation Australia
colmar brunton.

Onions, capsicums and garlic are the main vegetables that are served with chillies. Consumers prefer to stir fry chillies. There has been a consistent decline in frying as a cooking style over the last three waves.

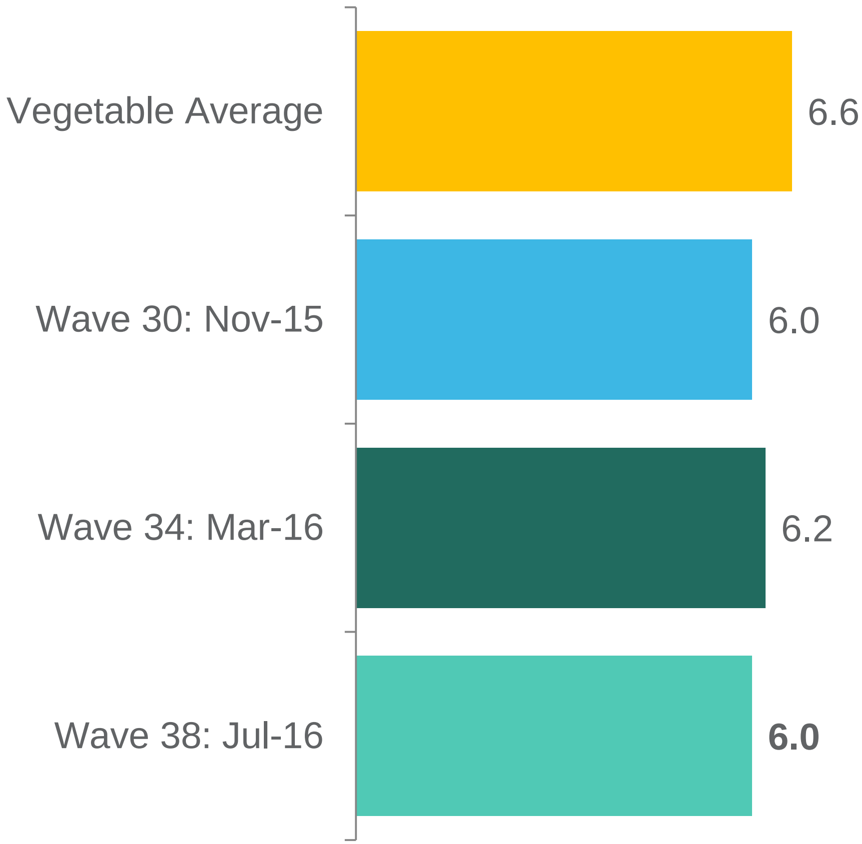
Accompanying Vegetables

Onion	64%
Capsicum	51%
Garlic	51%
Tomato	49%
Carrot	41%

Top 10 Cooking Styles			
	Wave 30	Wave 34	**Wave 38**
Stir frying	76%	78%	**76%**
Frying	45%	40%	**36%**
Raw	27%	32%	**30%**
Slow Cooking	32%	29%	**30%**
Sautéing	30%	30%	**26%**
Soup	28%	22%	**24%**
Roasting	19%	25%	**17%**
Grilling	16%	17%	**11%**
Baking	14%	8%	**11%**
Other	2%	4%	**6%**

Q9. How do you typically cook <commodity> ?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
Sample Wave 30 N=204, Wave 34 N=202, Wave 38 N=203

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



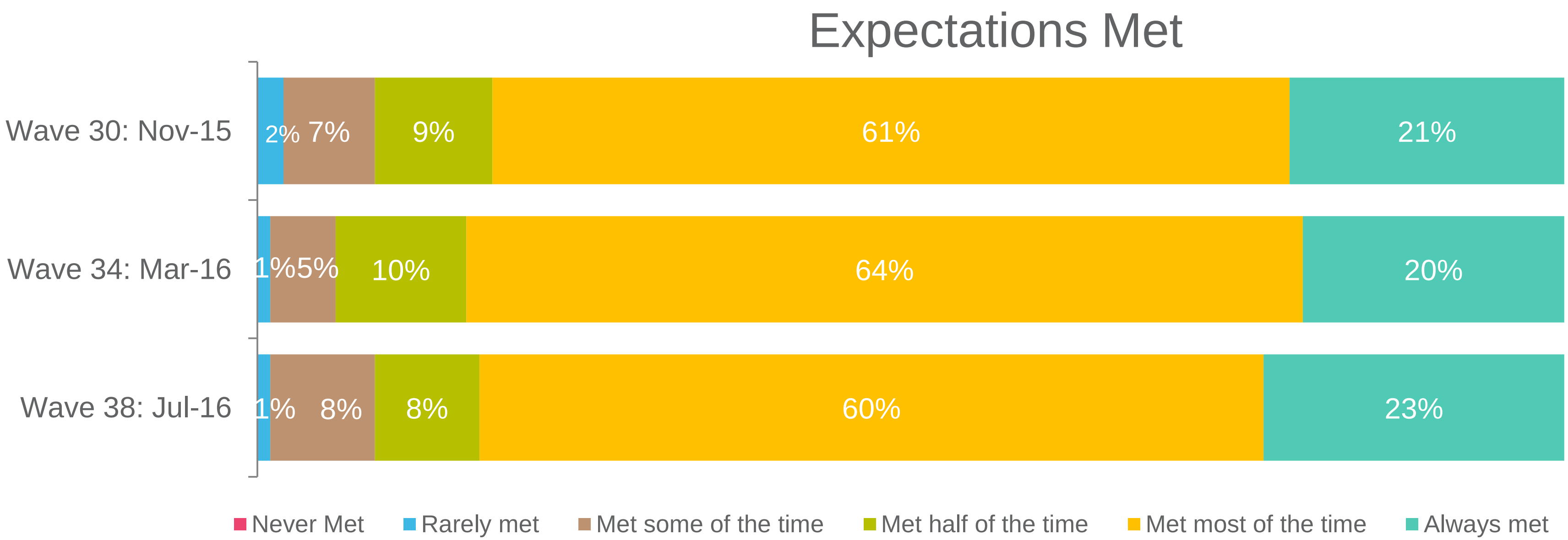
Q14. When purchasing <commodity>, how important is Provenance to you?
Q15. And when purchasing Chillies, how important is that it is grown in Australia?
Sample Wave 30 N=204, Wave 34 N=202, Wave 38 N=203

Freshness expectations have slightly improved this month with almost one quarter of consumers stating that their expectations were always met.

The expected shelf life of chillies has continued to improve this wave to approximately 12 days.

Expected to stay fresh for **11.8** days

▼ 10.4 days, Wave 30
▼ 11.2 days, Wave 34



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 30 N=204, Wave 34 N=202, Wave 38 N=203

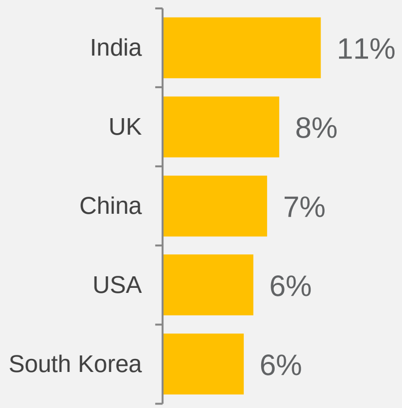
Chillies Product Launch Trends.

Chilli Global Launches

April – July 2016

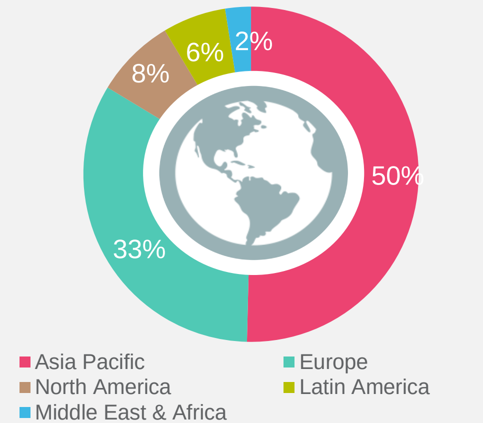
There were 3165 new products launched in the last 3 months that contained chilli as an ingredient. The majority of these launches were in the Asia Pacific and Europe. The top product launches categories were sauces & seasonings and meals.

Country

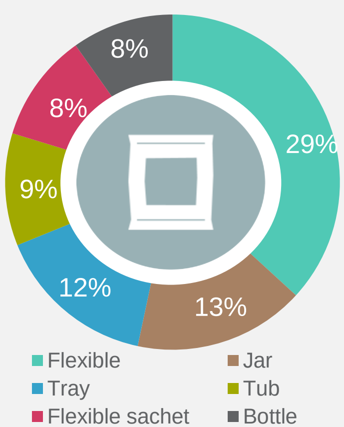


3165 Global NPDs

Region



Top Pack Formats



Categories

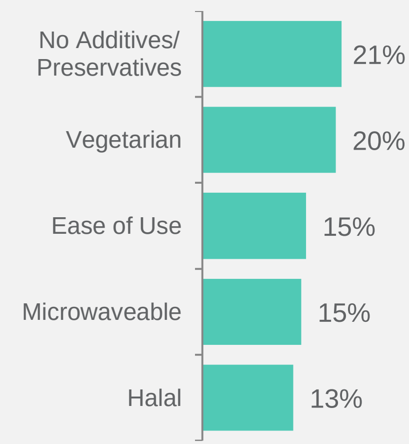
Sauces & Seasoning 34%

Meals 21%

Snacks 20%

Processed Products 13%

Top Claims



Chilli Product Launches:
Last 3 Months (April – July 2016)
Summary

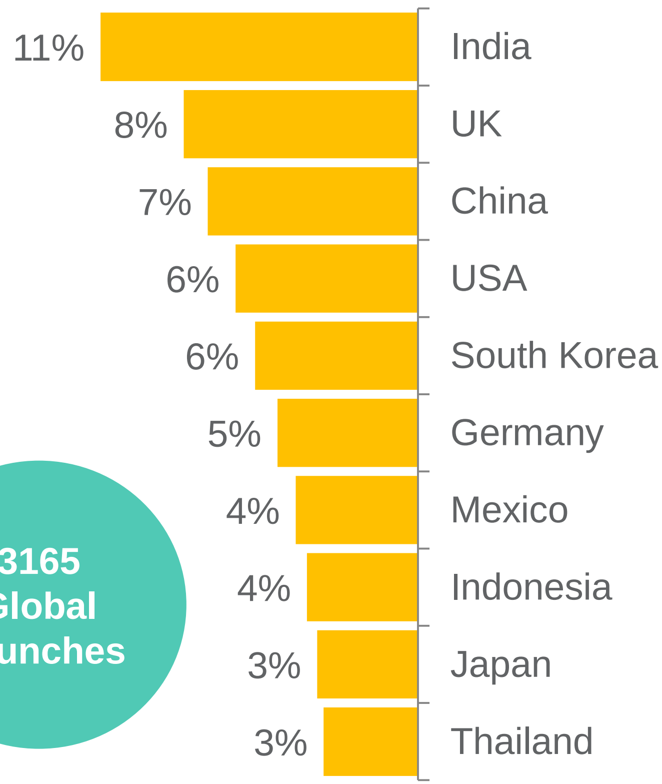
- A total of 3165 products that contained chilli as an ingredient have been launched globally in the last 3 months.
- There were 70 chilli products launched in Australia – slightly higher than the previous wave.
- The two main regions for launches are Asia Pacific (50%) and Europe (33%).
- Flexible packaging (29%) and jars (13%) remained the main formats used for chilli launches.
- Top categories for launches are sauces and seasoning (34%) and meals (21%).
- The key claims used are no additives/preservatives (21%) and vegetarian (20%).
- The most innovative product is Chilli Butter from Germany (see upcoming slides for more details).

Source: Mintel (2016)

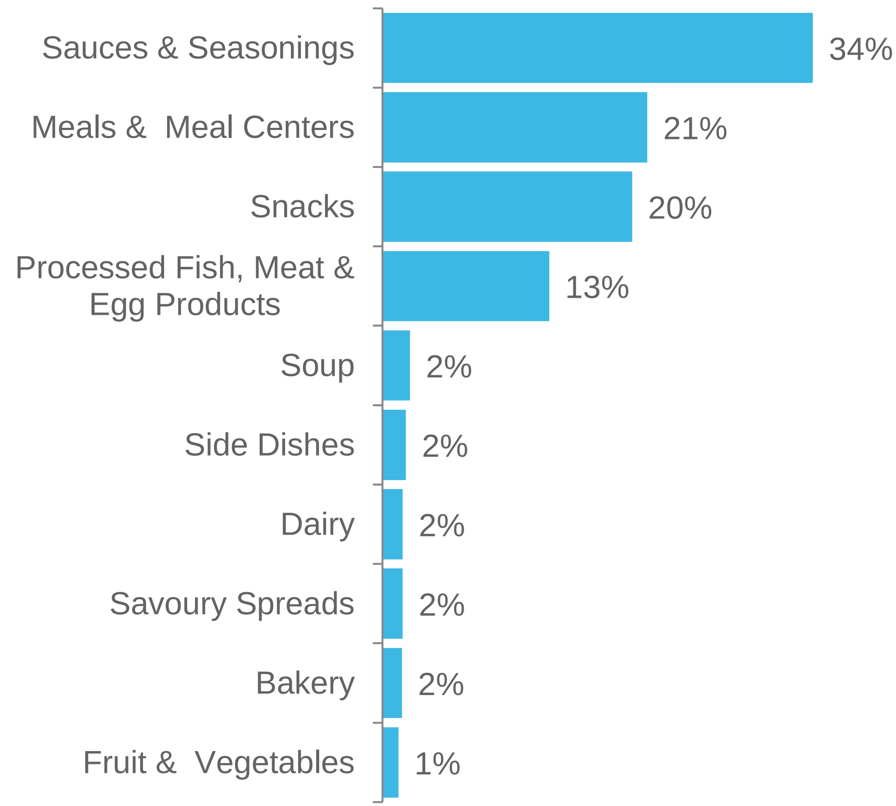
India and UK have had the greatest number of launches over the past three months. The majority of products are launched as sauces, meals and snacks.

3165 Global Launches

Top Launch Countries



Top Launch Categories



No additives/preservatives is the key claim used globally on products containing chilli. Flexible formats are the main type of packaging used, consistent with past waves.

Pack Formats Used

Global	Flexible	29%
Global	Jar	13%
Global	Tray	12%
Asia Pacific	Flexible	35%
Asia Pacific	Jar	14%
Asia Pacific	Flexible sachet	10%
Europe	Tray	26%
Europe	Flexible	21%
Europe	Jar	11%

Top Claims Used

Global	No Additives/Preservatives	21%
Global	Vegetarian	20%
Global	Ease of Use	15%
Asia Pacific	Vegetarian	27%
Asia Pacific	Halal	23%
Asia Pacific	No Additives/Preservatives	23%
Europe	Ethical - Environmentally Friendly Package	20%
Europe	Vegetarian	18%
Europe	Microwaveable	17%

Only shown regions > 30 products launched

Innovative Chilli Launches:
L3M (April – July 2016)

El Monterey Southwest Chicken Taquitos (Canada)

El Monterey Southwest Chicken Taquitos have been repackaged with a new look featuring the same great taste. These extra crunchy taquitos in a crispy seasoned shell contain three cheeses and can be microwave ready in 90 seconds. The USDA certified product retails in a 794g pack containing 20 units and a freezer friendly bag.

Claims:
Microwaveable

Wingreens Farms Chilli-Garlic Baked Pita Bread Crisps (India)

Wingreens Farms Chilli-Garlic Baked Pita Bread Crisps are now available. They are described as a traditional, natural and homemade all wheat product, are suitable for vegetarians and retail in a 100g pack.

Claims:
Vegetarian

Helda's Snack Spicy Tempeh Chips (Indonesia)

Helda's Snack Tempe Pedas (Spicy Tempeh Chips) are now available. The product retails in a 240g pack.

Claims:
N/A

Sister's Kitchen Mild Spicy Sugar Smoked Chicken Feet (China)

Sister's Kitchen Wei La Tan Xun Ji Zhua (Mild Spicy Sugar Smoked Chicken Feet) is smoked with cane sugar, pear wood and various natural spices. This product is said to be unique, non-greasy and sweet, and retails in a 60g pack featuring a QR code.

Claims:
N/A

Source: Mintel (2016)

Innovative Chilli Launches:
L3M (April – July 2016)

Thiriet Mini Club Sandwiches (France)

Thiriet Mini Club Sandwichs (Mini Club Sandwiches) are now available. The product consists of three recipes: smoked salmon flakes and tzatziki sauce on a pink bread; fresh cheese and nuts on a dark bread; chicken tikka on a yellow bread with mild spices and poppy seeds. This product is said to be easy to prepare by thawing in the fridge for six hours, and retails in a partly recyclable 95g pack of 15 units.

Claims:
Ethical - Environmentally Friendly Package, Ease of Use

Bell Sweet Chilli Beef Jerky (Switzerland)

Bell Rindflesicherzeugnis mit Sweet Chili Note (Sweet Chilli Beef Jerky) is made in Germany with meat from Lithuania, Estonia and Latvia. This grassland beef is rich in protein and does not contain flavour enhancers. This product retails in a 25g resealable pack.

Claims:
No Additives/Preservatives, Convenient Packaging

Aladdin Bakers Baked in Brooklyn Roasted Chile Pepper with Sesame Seed Sticks (USA)

Aladdin Bakers Baked in Brooklyn Roasted Chile Pepper with Sesame Seed Sticks feature a spicy kick from roasted ancho chillies, and said to have an unmistakably perfect crunch and flavor. The kosher certified product is always baked, and contains no cholesterol, trans fat or high fructose corn syrup. The breadsticks are suggested to be eaten as a snack, or matched with dips, savory spreads or a good schmear.

Claims:
Low/No/Reduced Cholesterol, Kosher, Low/No/Reduced Transfat

Clearspring Snack Organic Tamari Roasted Soya with Chilli (Portugal)

Clearspring Snack Organic Grãos de Soja Biológicos Tostados com Molho de Tamari e com Malagueta (Tamari Roasted Soya with Chilli) is now available. This product is gluten-free, is suitable for vegans, high in fiber and protein contents and is a source of magnesium. It retails in a 30g pack featuring the vegan, the EU Green Leaf and the Soil Association Organic logos.

Claims:
High/Added Fiber, Organic, Gluten-Free, Low/No/Reduced Allergen, Vegan, High Protein, No Animal Ingredients

Source: Mintel (2016)

Innovative Chilli Launches:
L3M (April – July 2016)

FamilyMart Famí Stir-Fried Roasted Duck and Basil with Rice (Thailand)

FamilyMart Famí Stir-Fried Roasted Duck and Basil with Rice is now available. This microwaveable product contains no added MSG and retails in a 220g pack.

Claims:
No Additives/Preservatives, Microwaveable

Weißenhorner Milch Manufaktur Alpine Chilli Butter (Germany)

Weißenhorner Milch Manufaktur Alpen-Chili Butter (Alpine Chilli Butter) is made from organic Bioland butter and cream with a milk fat content of 75%. This product retails in an 80g pack featuring the EU Green Leaf logo.

Claims:
Organic

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

John Cook Deli Meats Hot Chilli Mayo (South Korea)

John Cook Deli Meats Hot Chilli Mayo is now available. The product is made with mayonnaise, habanero chilli, dried chilli and jalapeno oleoresin, and retails in a 160g pack bearing the HACCP logo.

Claims:
N/A

Australian Chilli Launches:

L3M (April – July 2016)

Instant Nachos To-Go Chunky Original Nachos with Cheese Sauce & Salsa

San Remo Chilli Concentrato Stir-In

Coles Char Siu Australian Pork Slow Cooked Ribs

Hillier's Milk Chocolate Coated Sweet Chilli Cashews

Old El Paso Meatballs Meal

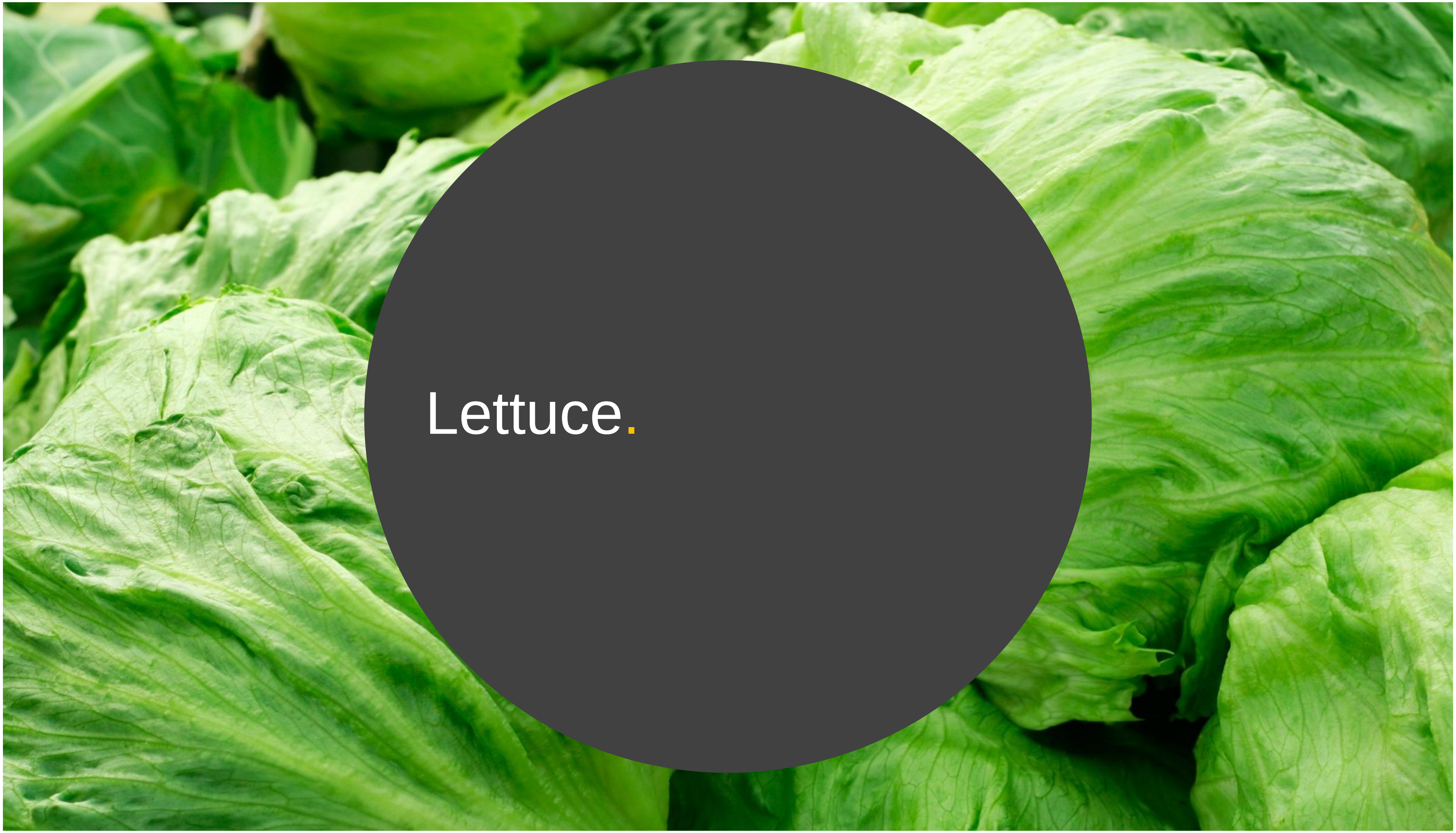
Picky Picky Peanuts Sweet Chilli & Lime Flavoured Peanuts

Nando's Peri Peri Grooves Smokey BBQ Flavour Potato Chips

John West Special Edition Fiery Hot Tuna Inferno

Source: Mintel (2016)

Lettuce.



Purchase and consumption of lettuce have both continued to decline this wave, which is likely associated to the colder months.

Mainstream retailers remain the primary channel of purchase for consumers, with increased purchase from specialist vegetable retailers.

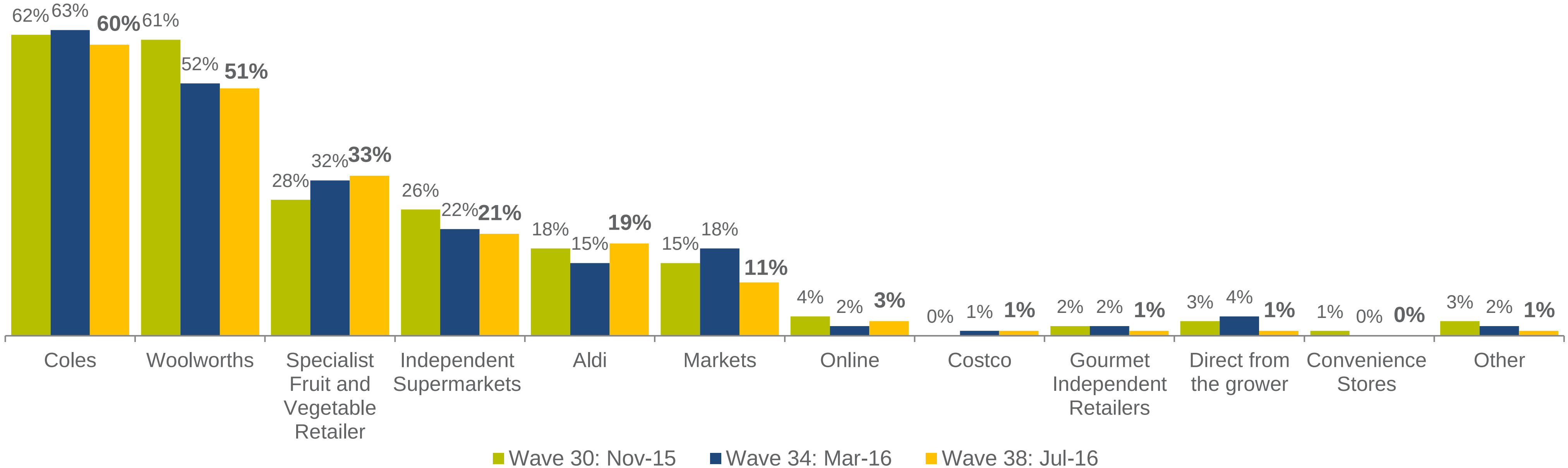
Average Purchase **3.7** times per month

4.4 times, Wave 30
4.1 times, Wave 34

Average Consumption **12.3** times per month

14.7 times, Wave 30
13.9 times, Wave 34

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 30 N=304, Wave 34 N=304, Wave 38 N=302

Horticulture Innovation Australia

colmar brunton.

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

Average Spend and Price Sensitivity.

Average weight of purchase

The typical consumer purchases **600g** of lettuce, which is slightly lower than the previous waves.

▲ 700g, Wave 30
▲ 700g, Wave 34

Recalled last spend

Recalled spend on lettuce was **$2.90**, which has marginally increased this wave.

▼ $2.70, Wave 30
▼ $2.70, Wave 34

Value for money

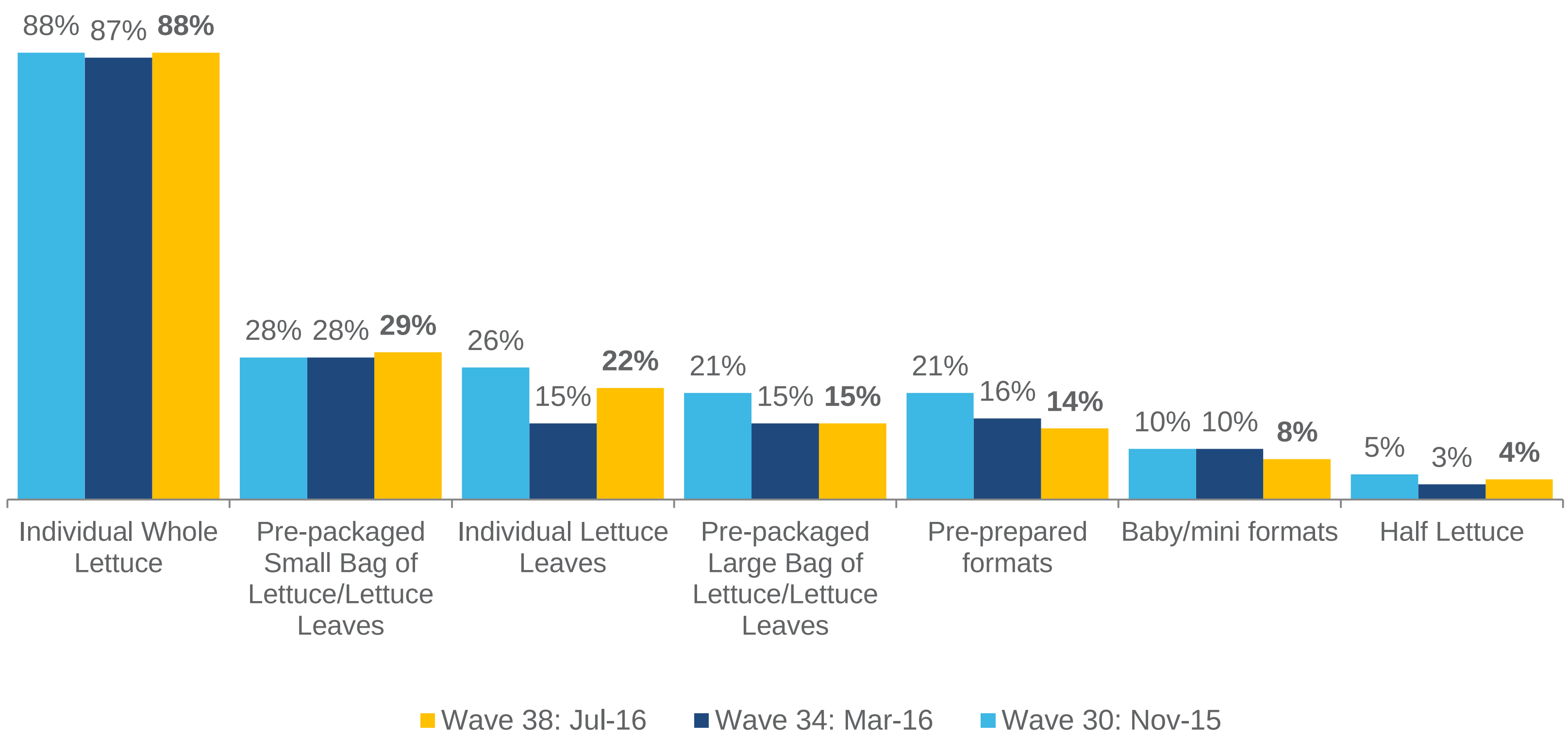
Consumers' perceived value for money is relatively good **(6.3/10)**, which is in line with perceptions from Wave 30.

— 6.3/10, Wave 30
▲ 6.6/10, Wave 34

Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? 0-10 scale
Sample Wave 30 N=304, Wave 34 N=304, Wave 38 N=302

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

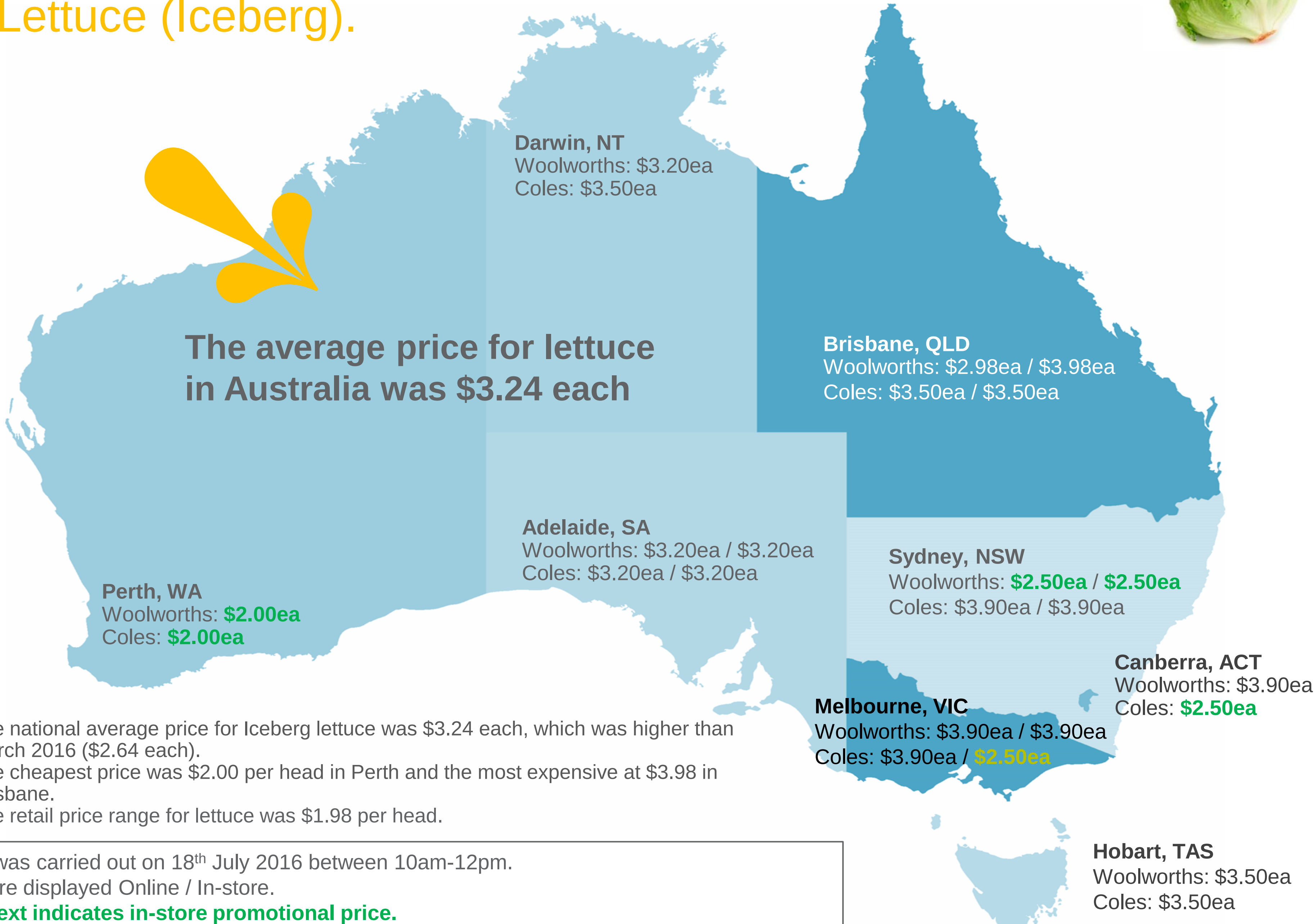
Individual lettuce heads are purchased by the majority of consumers. There has been a continuous decline in the purchase of pre-prepared formats over the last three waves.



Q4b In what fresh formats do you typically purchase Lettuce?
Sample Wave 30 N=304, Wave 34 N=304, Wave 38 N=302

Online and In-store Commodity Prices.

Lettuce (Iceberg).

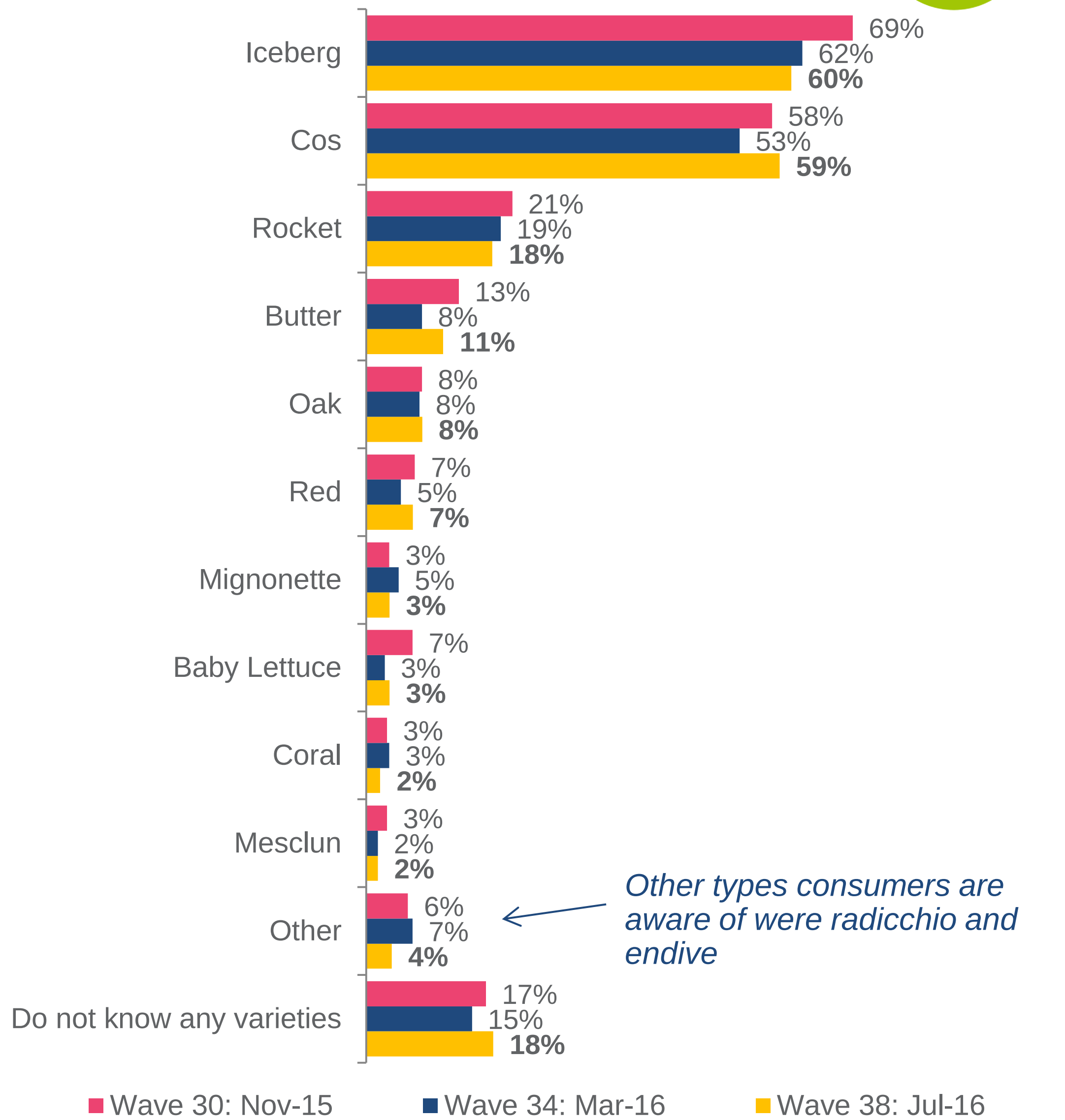


- The national average price for Iceberg lettuce was $3.24 each, which was higher than March 2016 ($2.64 each).
- The cheapest price was $2.00 per head in Perth and the most expensive at $3.98 in Brisbane.
- The retail price range for lettuce was $1.98 per head.

Pricing was carried out on 18th July 2016 between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates in-store promotional price.

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

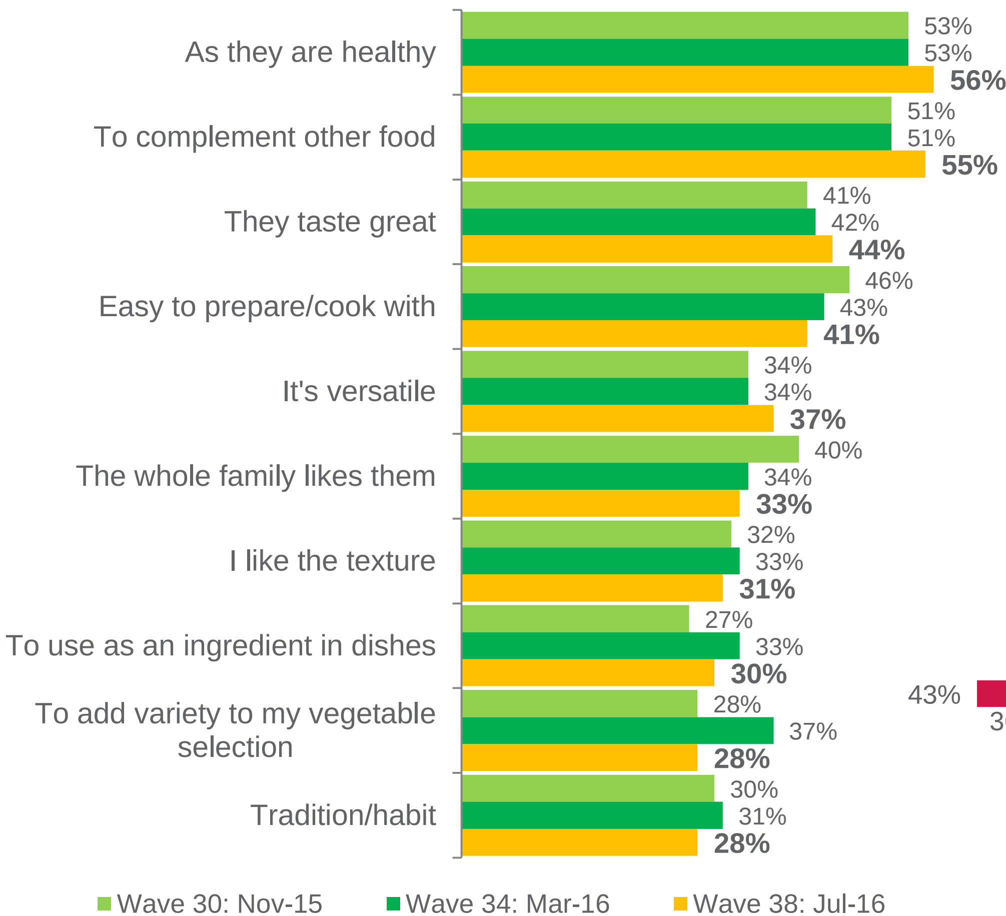
Several lettuce types recalled are not actually lettuce, although consumers perceive them to be, such as rocket, endive and radicchio.



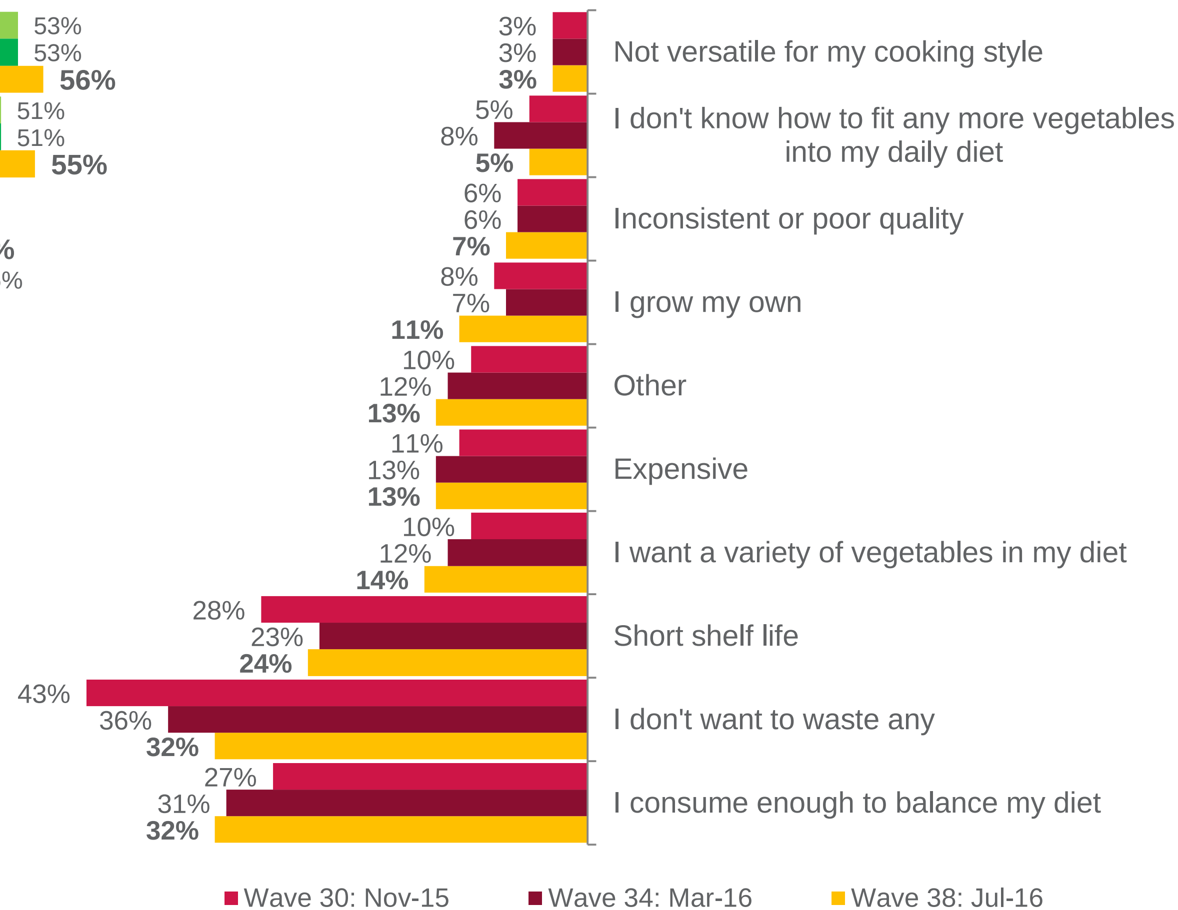
Q6a. What types/varieties of <commodity> are you aware of? (unprompted)
Sample Wave 30 N=304, Wave 34 N=304, Wave 38 N=302

Purchasing lettuce is triggered by health, complementing other food, and taste. Already consuming enough and not wanting to waste any and are key barriers to purchase, with the latter noticeably declining over the last three waves.

Triggers



Barriers



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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 30 N=304, Wave 34 N=304, Wave 38 N=302

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

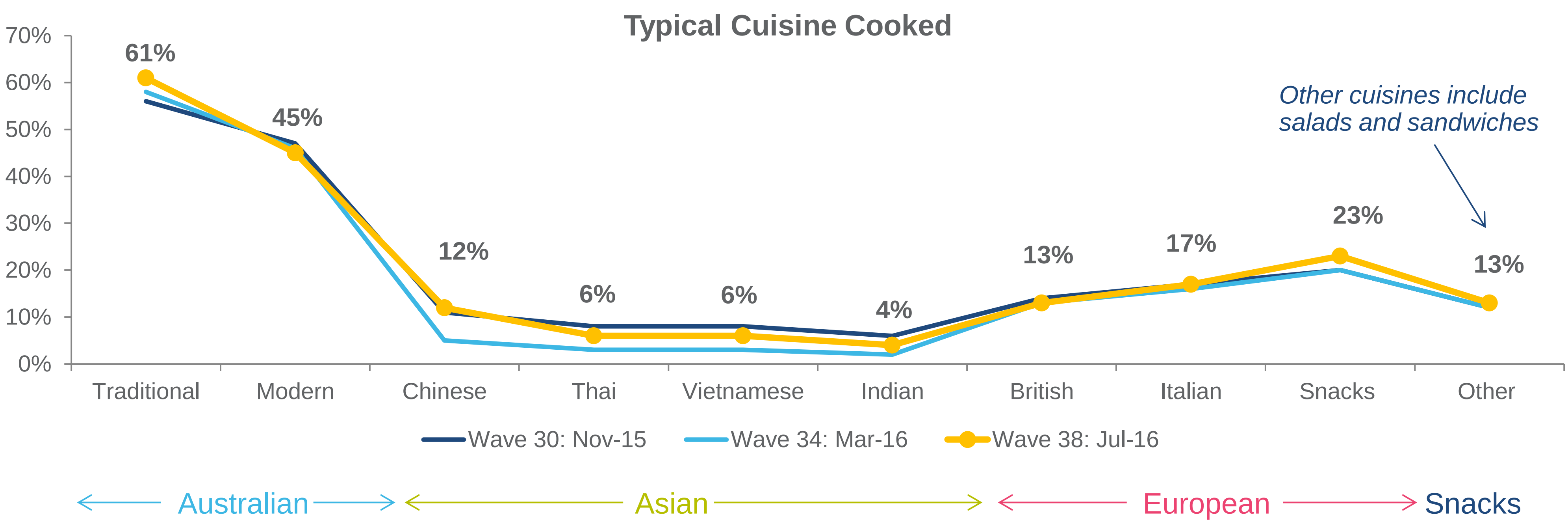
Lettuce consumption continues to be most popular during lunch and dinner occasions.

Top 5 Consumption Occasions

	Wave 34	Wave 38
Lunch	67%	**72%**
Dinner	67%	**58%**
Quick Meals	46%	**51%**
Family meals	49%	**51%**
Weekday meals	48%	**47%**

7% used lettuce when cooking a new recipe

7%, Wave 34



Q10. What cuisines do you cook/consume that use <commodity> ?
Q11. Which of the following occasions do you typically consume/use <commodity> ?
Sample Wave 30 N=304, Wave 34 N=304, Wave 38 N=302

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

The majority of consumers eat lettuce raw, and served with tomatoes, cucumber and capsicum.

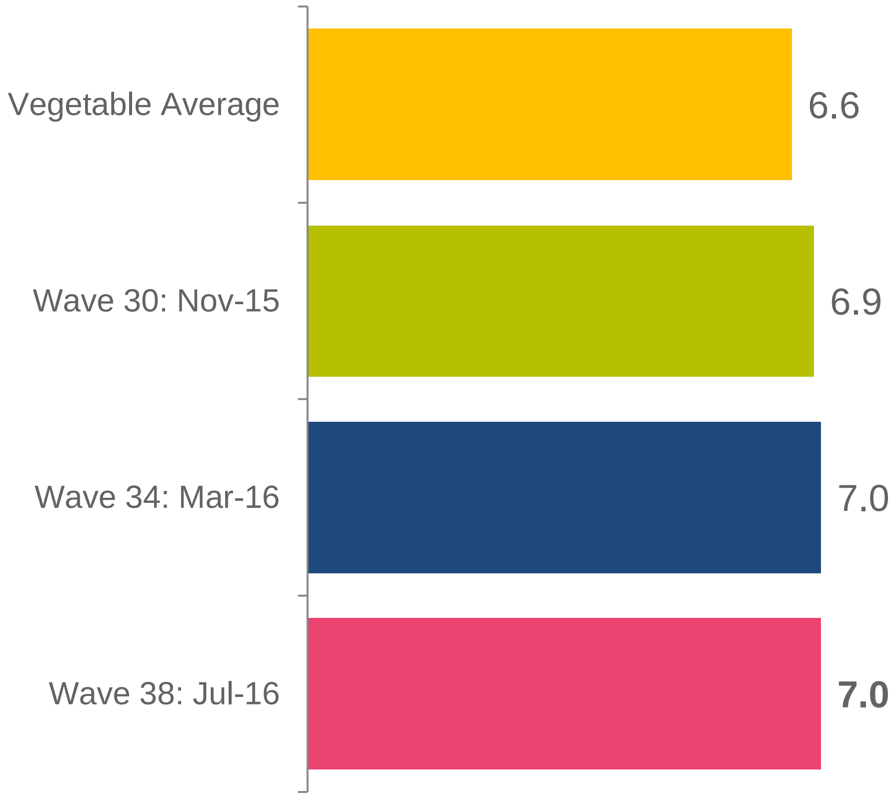
Accompanying Vegetables

Tomato	86%
Cucumber	53%
Capsicum	52%
Carrot	45%
Onion	44%

Top 10 Cooking Styles			
	Wave 30	Wave 34	**Wave 38**
Raw	80%	76%	**78%**
Other	17%	21%	**17%**
Stir frying	6%	3%	**6%**
Soup	3%	2%	**3%**
Boiling	1%	0%	**2%**
Steaming	2%	1%	**2%**
Sautéing	1%	1%	**2%**
Microwave	1%	0%	**1%**
Mashing	0%	0%	**1%**
Frying	0%	0%	**1%**

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 30 N=304, Wave 34 N=304, Wave 38 N=302

Lettuce provenance has remained stable with the previous wave. Knowing that lettuce is grown in Australia remains highly important information for consumers.



8.4

Q14. When purchasing <commodity>, how important is Provenance to you?
Q15. And when purchasing Lettuce, how important is that it is grown in Australia?
Sample Wave 30 N=304, Wave 34 N=304, Wave 38 N=302

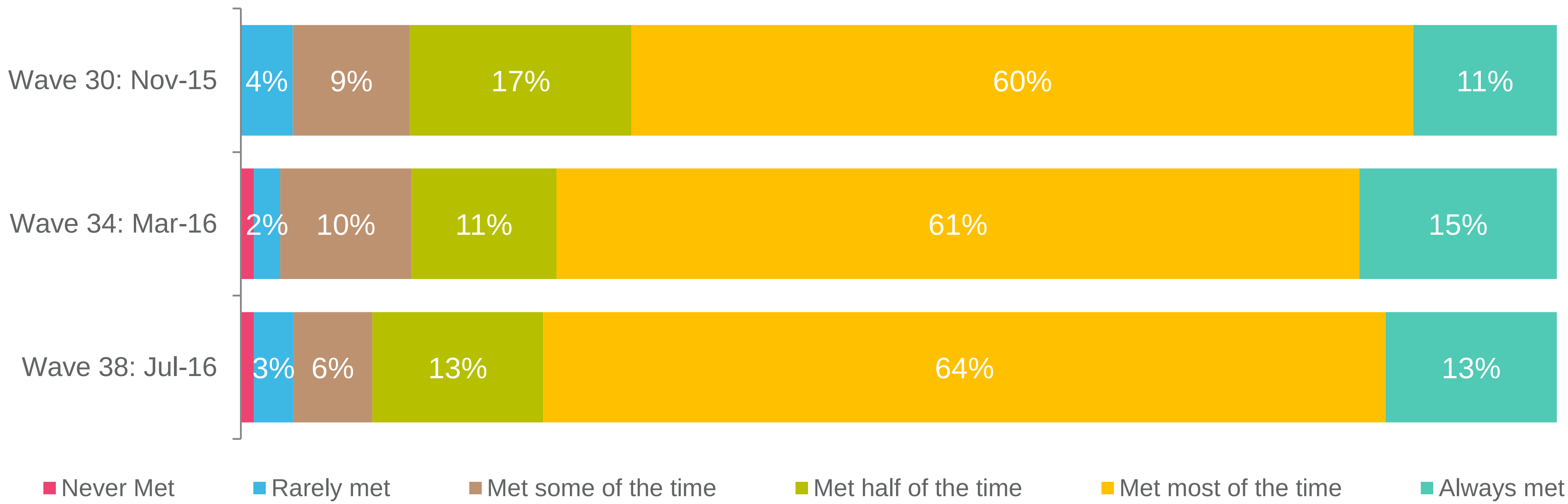
Expected shelf-life has increased this wave and is expected to last for around 8 days.

These expectations are being increasingly met most of the time.

Expected to stay fresh for **8.5** days

▼ 7.7 days, Wave 30
▼ 8.4 days, Wave 34

Expectations Met



Q12. How long do you expect <commodity> to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy <commodity> ?
Sample Wave 30 N=304, Wave 34 N=304, Wave 38 N=302

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

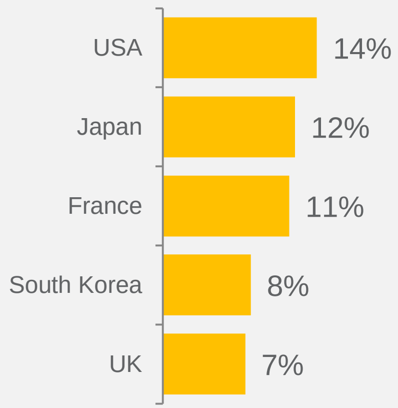

Lettuce Product
Launch Trends.

Lettuce Global Launches

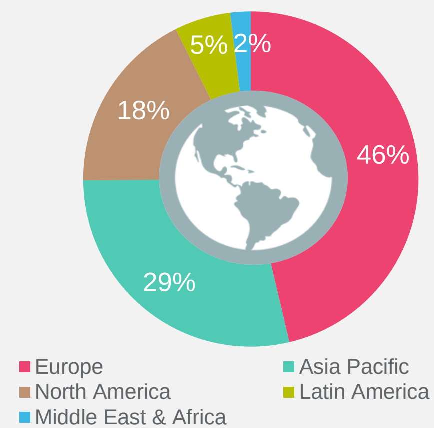
April – July 2016

There were 203 products launched globally over the last three months that contained lettuce as an ingredient. The main regions for launches were Europe and Asia Pacific. Product launches were primarily meals and fruit & vegetables.

Country

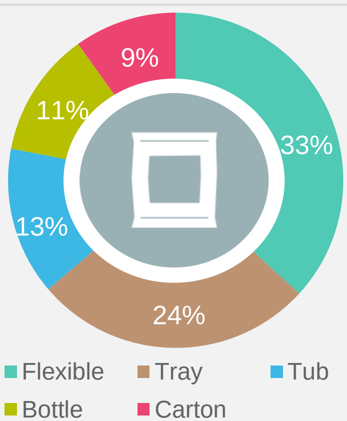


Region



203 Global NPDs

Top Pack Formats



Categories

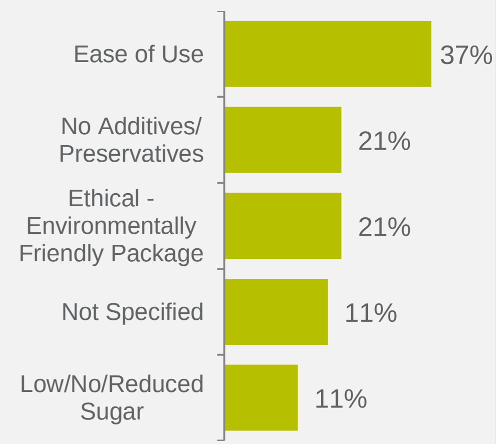
Meals 48%

Fruit & Vegetables 27%

Juice Drinks 18%

Dairy 1%

Top Claims



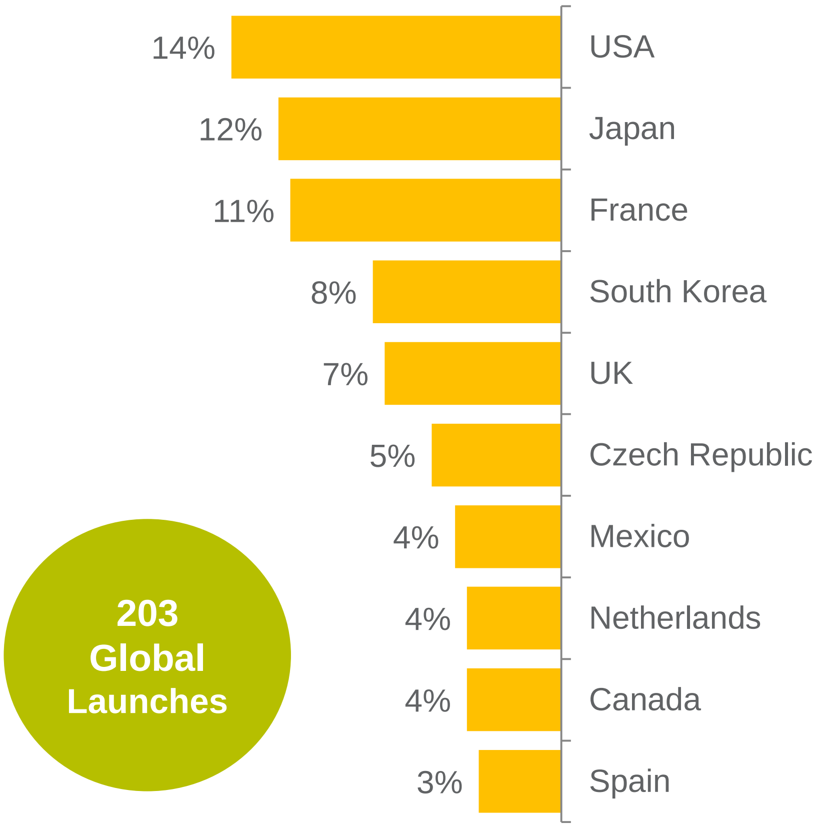
Lettuce Product Launches:
Last 3 Months (April – July 2016)
Summary

- Globally, there were 203 products launched, relatively consistent with the previous wave.
- There was only one product launched containing lettuce as an ingredient launched in Australia over the last 3 months.
- The majority of products were launched in Europe (46%) and Asia Pacific (29%).
- Flexible formats (33%) and trays (24%) were the main packaging formats used.
- The top categories for launches were meals (48%), fruit and vegetables (27%) and juice drinks (18%), which was consistent with previous trends.
- The key claims used over the past three months were ease of use (37%), no additives and preservatives (20%) and environmentally friendly packaging (21%).
- The most innovative launch found was Green Power Tablets from South Africa. Examples can be found over the next slides.

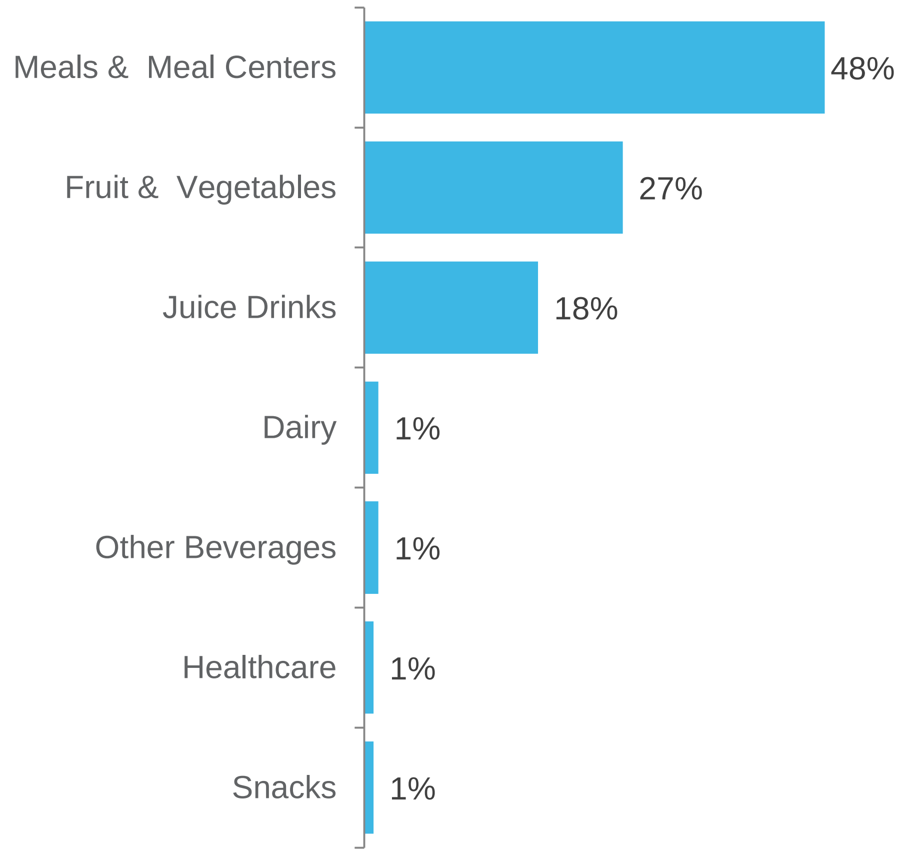
Source: Mintel (2016)

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

Top Launch Countries



Top Launch Categories



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Top claims used included ease of use and no additives and preservatives. Flexible packs and trays were the most commonly used formats, consistent with the previous wave.

Pack Formats Used

Global	Flexible	33%
Global	Tray	24%
Global	Tub	13%
Europe	Flexible	44%
Europe	Tray	34%
Europe	Tub	14%
Asia Pacific	Bottle	26%
Asia Pacific	Carton	26%
Asia Pacific	Tub	17%

Top Claims Used

Global	Ease of Use	37%
Global	No Additives/Preservatives	21%
Global	Ethical - Environmentally Friendly Package	21%
Europe	Ease of Use	45%
Europe	Ethical - Environmentally Friendly Package	24%
Europe	No Additives/Preservatives	14%
Asia Pacific	Low/No/Reduced Sugar	40%
Asia Pacific	Low/No/Reduced Sodium	38%
Asia Pacific	No Additives/Preservatives	33%

Only regions with n >30 are displayed

Innovative Lettuce Launches:
L3M (April – July 2016)

The Triple P Garden Salad (Thailand)

The Triple P Garden Salad is made with organic 100% natural ingredients without pesticides, antibiotics, growth hormones, GMO, sludge and irradiation. The vegetables have been grown with organic fertilisers which help them grow with natural nutrients derived from animal matter, human excreta or vegetable matter. The nutrients are said to be more healthy and comforting for health. This ready-to-eat product retails in a 150g pack.

Claims:
All Natural Product, Organic, Ethical - Environmentally Friendly Product, Ease of Use, Hormone Free, GMO-Free

Pulmuone Salad Farm Butterhead Lettuce (South Korea)

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

Claims:
N/A

Asda Grower's Selection Texas Chicken & Fiery Cheese Salad (UK)

Asda Grower's Selection Texas Chicken & Fiery Cheese Salad is now available. The product is loaded with spicy chicken, cheese and jalapeños, with a ranch dressing, and contains no artificial colours, flavours or hydrogenated fat. It retails in a 320g partially recyclable pack containing one fork.

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

Morrisons The Best Chicken & Smoked Bacon Club (UK)

Morrisons The Best Chicken & Smoked Bacon Club is now available with a new and improved recipe. The sandwich consists of tender and cooked British chicken and smoked bacon with mature Cheddar, vine ripened tomato and lettuce, on sundried tomato bread and white bread. It retails in a partially recyclable pack.

Claims:
Premium, Ethical - Environmentally Friendly Package

Source: Mintel (2016)

Innovative Lettuce Launches:
L3M (April – July 2016)

Tesco Healthy Living Smoked Ham & Cottage Cheese Sandwich Thin (UK)

Tesco Healthy Living Smoked Ham & Cottage Cheese Sandwich Thin comprises dry cured smoked formed ham, tomato, cottage cheese and lettuce in a seeded thin sandwich. The low-fat product is free from artificial flavours and artificial colours, and is suitable for people who want to manage levels of sugar, salt, fat and saturates. It offers five Weight Watchers ProPoints per pack, and retails in a recyclable single-count pack bearing the FSC Mix logo.

Claims:
No Additives/Preservatives, Low/No/Reduced Fat, Ethical - Environmentally Friendly Package, Slimming

The Deli Chicken and Bacon Pasta Salad (UK)

The Deli Chicken and Bacon Pasta Salad comprises cooked pasta, sliced chicken and crunchy bacon layered salad with mayonnaise. This ready to eat product retails in a recyclable 375g pack with a fork.

Claims:
Ethical - Environmentally Friendly Package, Ease of Use

Delixia Premium Cream Cheese, Jalapeno and Lettuce Wrap (Mexico)

Delixia Premium Wrap de Queso Crema, Jalapeño y Lechuga (Cream Cheese, Jalapeno and Lettuce Wrap) is new to the range. This product retails in a 195g pack.

Claims:
Premium

Gartenfrisch Jung Meatballs & Pasta Salad Bowl (Germany)

Gartenfrisch Jung Salatschale Hackbällchen & Nudeln (Meatballs & Pasta Salad Bowl) comprises meatballs, roast onions, radish and pasta. The product retails in a 350g pack including an old guild style dressing and a fork.

Claims:
N/A

Source: Mintel (2016)

Innovative Lettuce Launches:
L3M (April – July 2016)

Biozyme Fermented Vegetable and Fruit Beverage Concentrate (China)

Biozyme Yun Bao Zhi Cui Nong Suo Fa Jiao Xing Guo Shu Zhi Yin Liao (Fermented Vegetable and Fruit Beverage Concentrate) can be served by diluting with cold water. This product retails in a 60ml pack featuring a QR code. The product was on display at the Sial Tradeshow 2016, China.

Claims:
N/A

The Real Thing Green Power Tablets (South Africa)

The Real Thing Green Power Tablets have been repackaged in an 800mg pack with 150 easy to take tablets. It is a 100% organic blend of wheat, barley and alfalfa grass with seven sea vegetables, chlorella and spirulina. Each of this nature's most healing superfoods is said to offer the antioxidant chlorophyll, as well as its own array of nutrients. Green cereal grasses are rich in chlorophyll, vitamins, minerals, enzymes, amino acids and phytonutrients that provide nutritional energy.

Claims:
No Additives/Preservatives, Other (Functional), Organic, Anti-Bacterial, Botanical/Herbal, Gluten-Free, Antioxidant, Cardiovascular (Functional), Low/No/Reduced Allergen, Ease of Use, Energy (Functional)

Amazing Grass Raw Reserve Green Superfood Berry Flavored Dietary Supplement (USA)

Amazing Grass Raw Reserve Green Superfood Berry Flavored Dietary Supplement contains 25 billion probiotics per serving and is made with E3Live. The CCOF organic certified raw product is free from gluten, soy and GMO, is suitable for vegans, can be mixed with water or juice, and retails in a 8g pack.

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

Chef Select To Go Smoked Ham & Mozzarella Salad with Conchiglie & Mini-Torsades Pasta Kit (France)

Chef Select To Go Crudités Jambon Fumé Mozzarella Conchiglie & Mini-Torsades (Smoked Ham & Mozzarella Salad with Conchiglie & Mini-Torsades Pasta Kit) has been repackaged. The product comprises salad made with cooked pasta, a green salad mix, cherry tomatoes, Mozzarella and smoked speck ham with a balsamic vinegar sauce and salted breadsticks.

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

Source: Mintel (2016)

Sweet Corn.

Both average purchase and consumption have increased this wave.

Purchase remains primarily through Coles and Woolworths, with all purchase channels remaining relatively consistent with the previous wave.

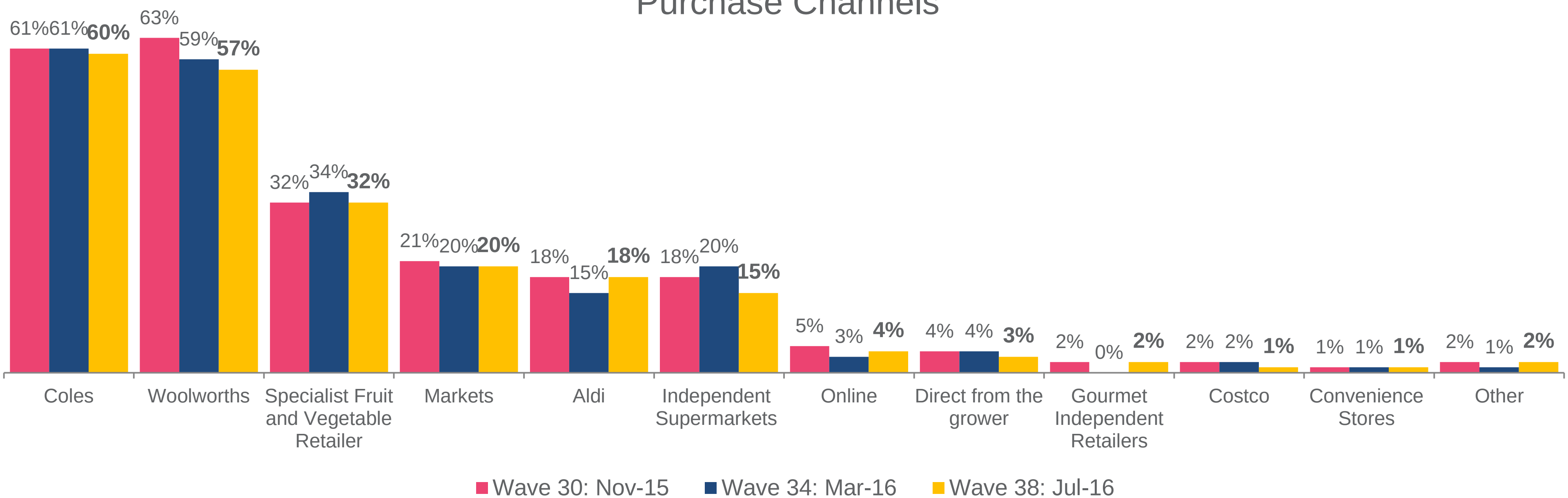
Average Purchase **3.9** times per month

▲ 4.0 times, Wave 30
▼ 3.6 times, Wave 34

Average Consumption **6.9** times per month

▼ 6.1 times, Wave 30
▼ 6.6 times, Wave 34

Purchase Channels



Q1. On average, how often do you purchase <commodity>?
Q2. On average, how often do you consume <commodity>?
Q5. From which of the following channels do you typically purchase <commodity>?
Sample Wave 30 N=302, Wave 34 N=310, Wave 38 N=303

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

Average Spend and Price Sensitivity.

Average weight of purchase

The typical consumer purchases **0.8kg** of sweet corn, which is marginally lower than the previous waves.

▲ 0.9kg, Wave 30
▲ 0.9kg, Wave 34

Recalled last spend

Recalled last spend on sweet corn was **$3.60,** which has increased this wave.

▲ $4.20, Wave 30
▼ $3.30, Wave 34

Value for money

Consumers' perceived value for money was good **(7.0/10)**, which has continued to trend upwards this wave.

▼ 6.6/10, Wave 30
▼ 6.9/10, Wave 34

Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is?
Sample Wave 30 N=302, Wave 34 N=310, Wave 38 N=303

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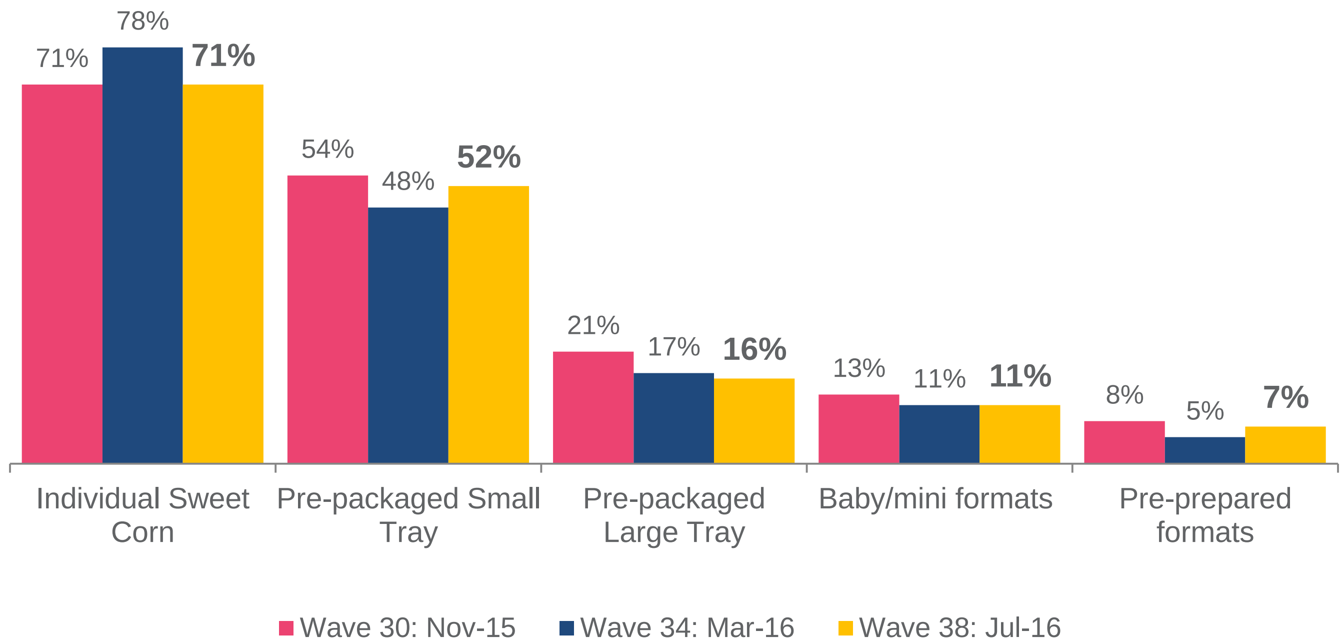
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

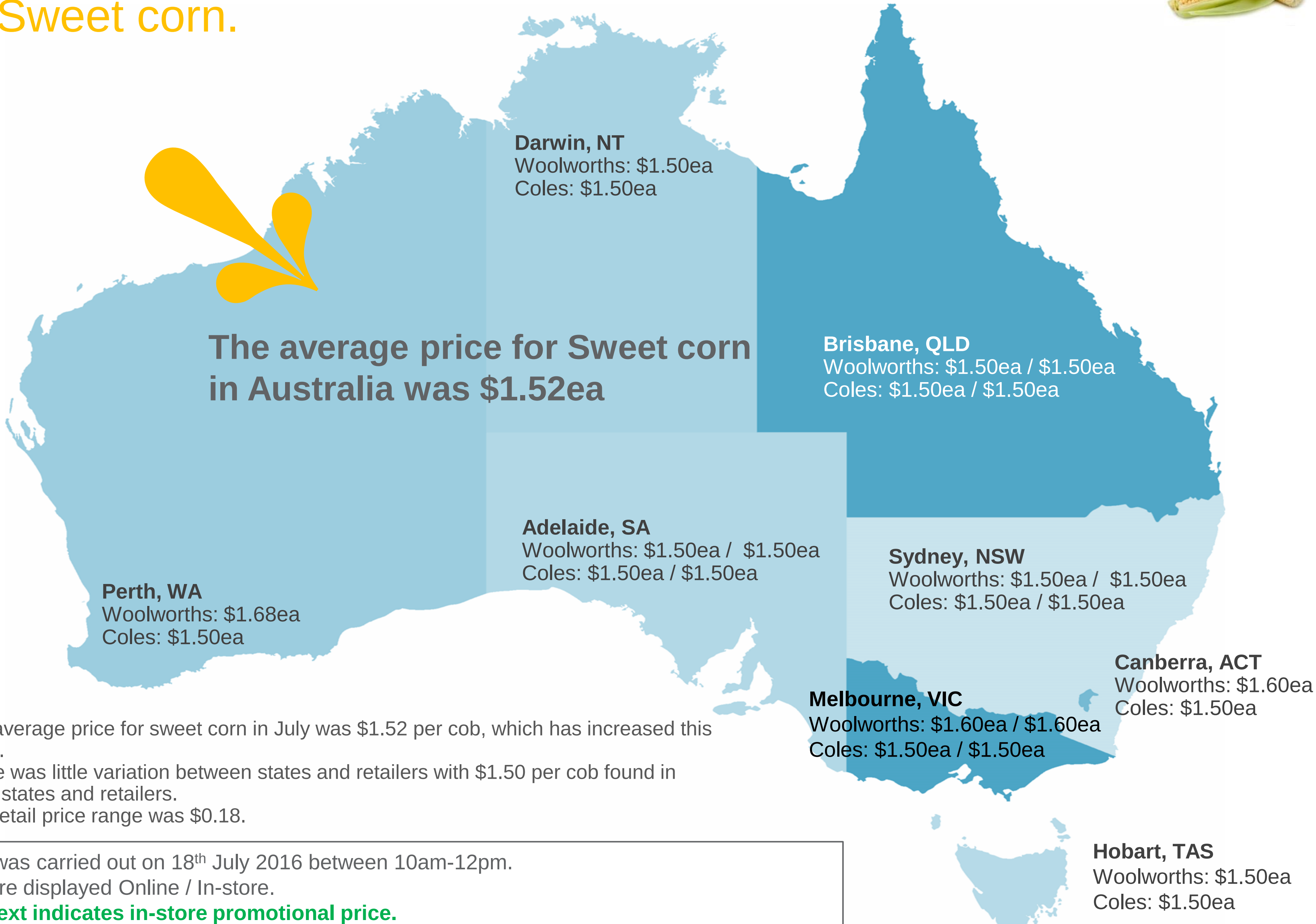
Individual cobs and small trays of corn remain the most common formats purchased. Pre-packaged large trays are also a relatively popular format.



Q4b In what fresh formats do you typically purchase Sweet Corn?
Sample Wave 30 N=302, Wave 34 N=310, Wave 38 N=303

Online and In-store Commodity Prices.

Sweet corn.

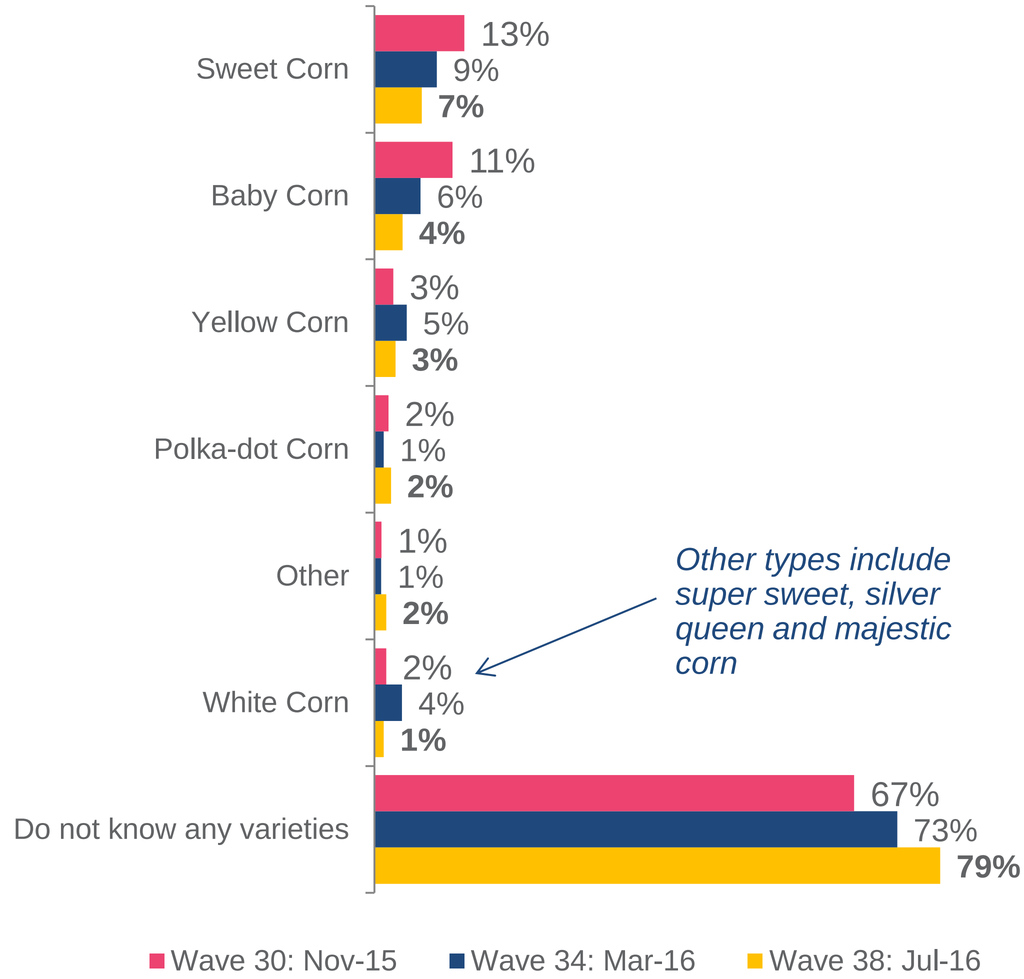


- The average price for sweet corn in July was $1.52 per cob, which has increased this wave.
- There was little variation between states and retailers with $1.50 per cob found in most states and retailers.
- The retail price range was $0.18.

Pricing was carried out on 18th July 2016 between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates in-store promotional price.

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

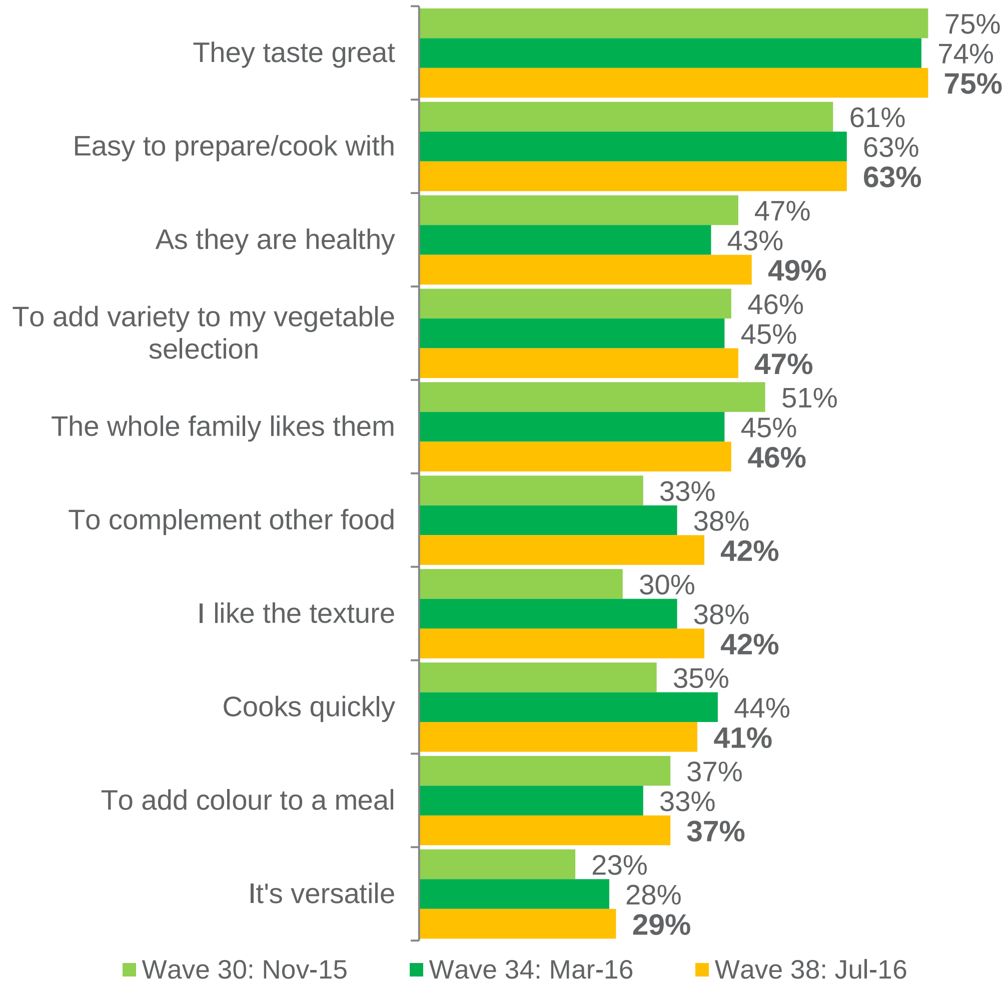
Sweet corn in general remains the most recalled type.



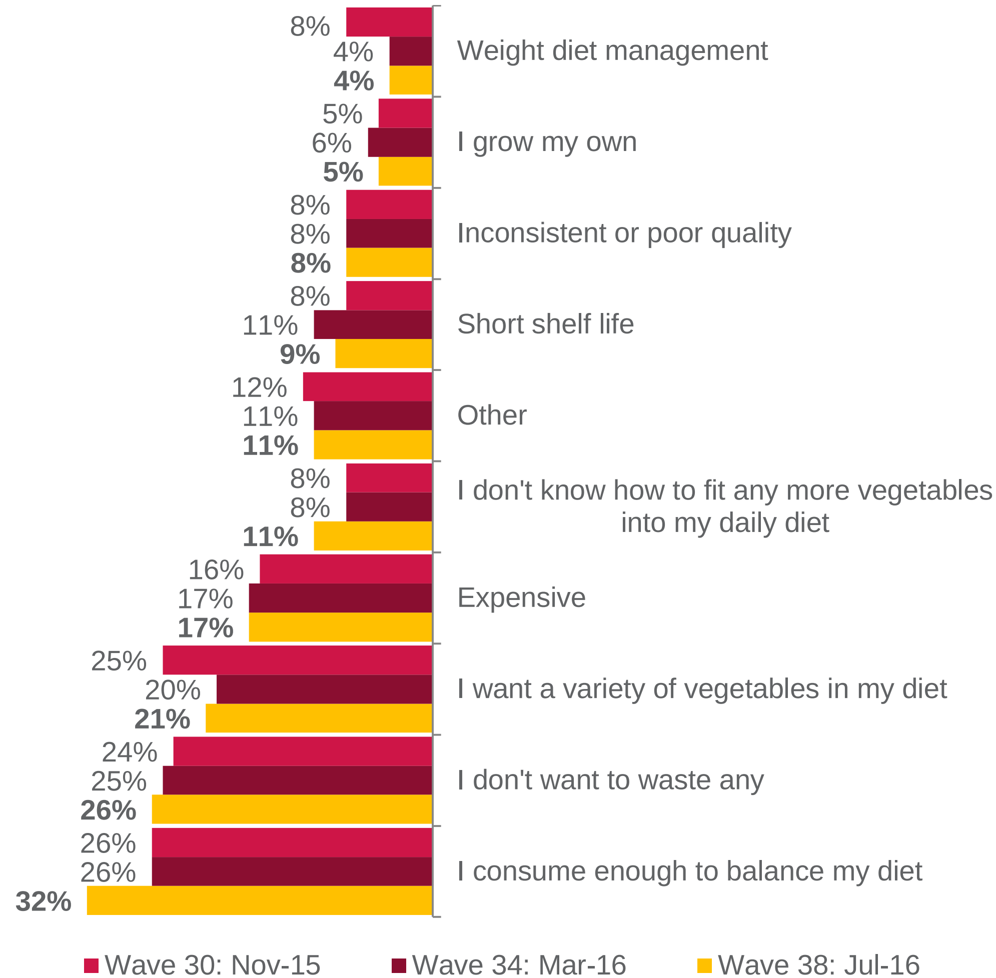
Q6a. What varieties of <commodity> are you aware of? (unprompted)
Sample Wave 30 N=302, Wave 34 N=310, Wave 38 N=303

The key triggers to purchasing sweet corn are taste and ease of preparation. Key barriers for consumers include already consuming enough and not wanting to waste any. Complementing other food and texture have trended upwards as triggers to purchase over the last three waves.

Triggers



Barriers



Q7. Which of the following reasons best describes why you purchase <commodity>?
Q8. Which reason best describes why you don't buy <commodity> more often?
Sample Wave 30 N=302, Wave 34 N=310, Wave 38 N=303

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

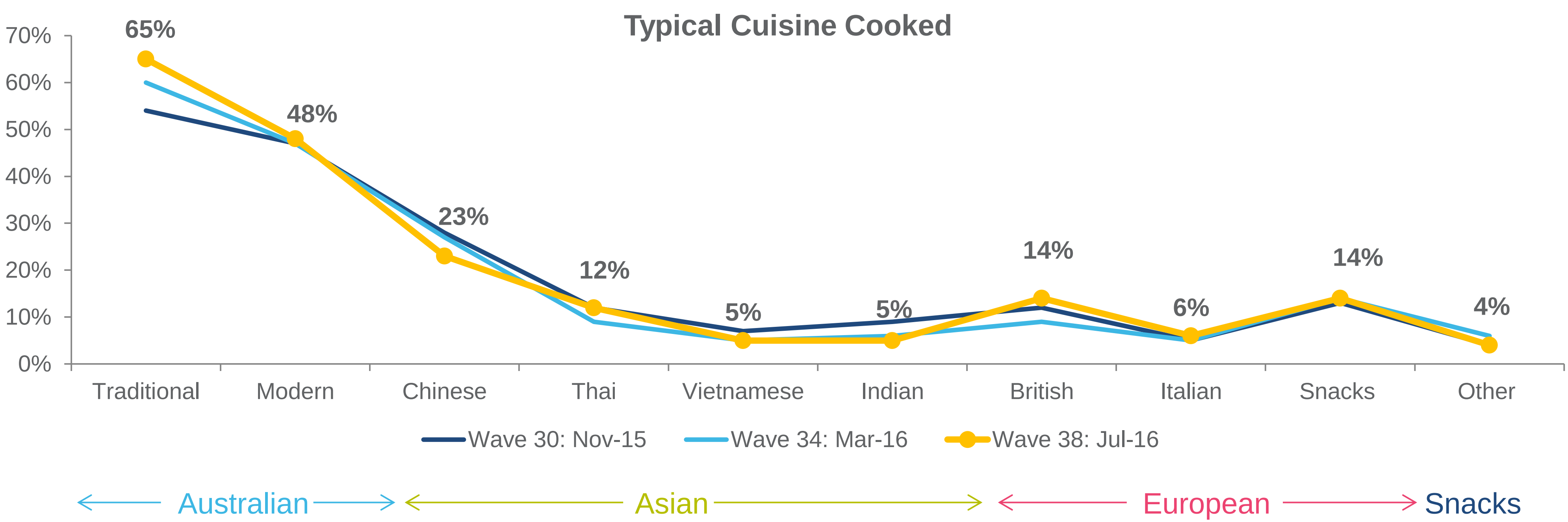
Dinner and family meals remain the main meal occasions for corn.

Top 5 Consumption Occasions

	Wave 34	Wave 38
Dinner	69%	**70%**
Family meals	52%	**57%**
Weekday meals	43%	**43%**
Weekend meals	39%	**39%**
Quick Meals	35%	**31%**

8% used sweet corn when cooking a new recipe

▲ 10%, Wave 34



Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?
Sample Wave 30 N=302, Wave 34 N=310, Wave 38 N=303

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

On trend with previous waves, consumers prefer to boil, steam and microwave sweet corn. Carrots, potatoes and broccoli are regularly served as accompanying vegetables.

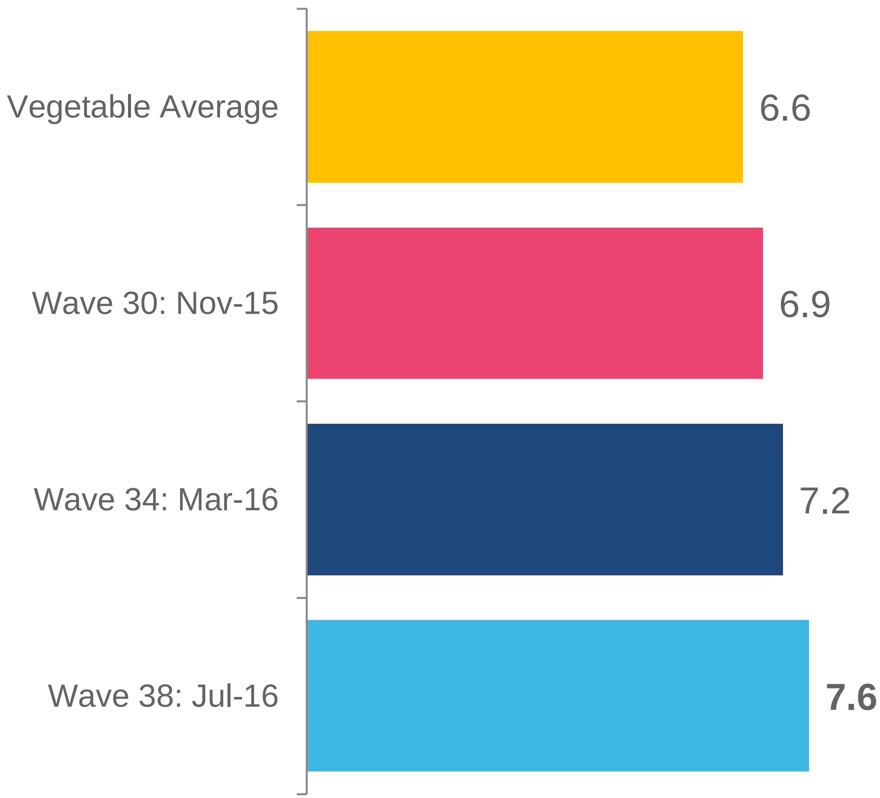
Accompanying Vegetables

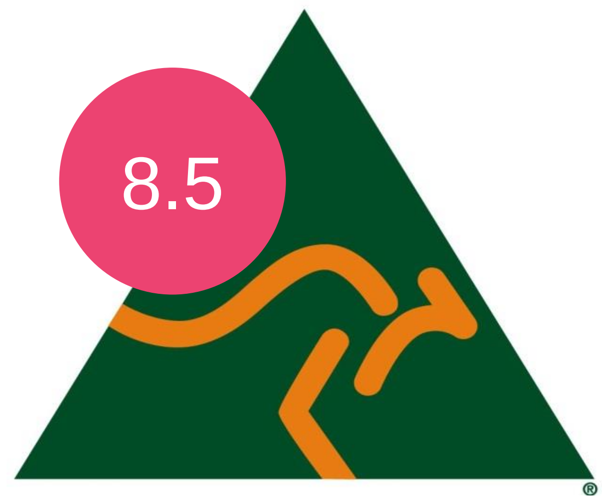
Carrot	61% ▲
Potato	60% ▲
Broccoli	40% ▲
Green Peas	34% ▲
Sweet Potato	34% ▲

Top 10 Cooking Styles			
	Wave 30	Wave 34	Wave 38
Boiling	58%	53%	**58%**
Steaming	46%	42%	**47%**
Microwave	25%	28%	**26%**
Stir frying	25%	22%	**25%**
Soup	18%	17%	**18%**
Grilling	17%	18%	**17%**
Roasting	12%	10%	**15%**
Raw	9%	8%	**9%**
Slow Cooking	6%	8%	**8%**
Baking	8%	5%	**8%**

Q9. How do you typically cook <commodity>?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
Sample Wave 30 N=302, Wave 34 N=310, Wave 38 N=303

The importance of provenance has continued to increase this wave. Additionally, consumers perceive that knowing that their sweet corn is grown in Australia is highly important information.





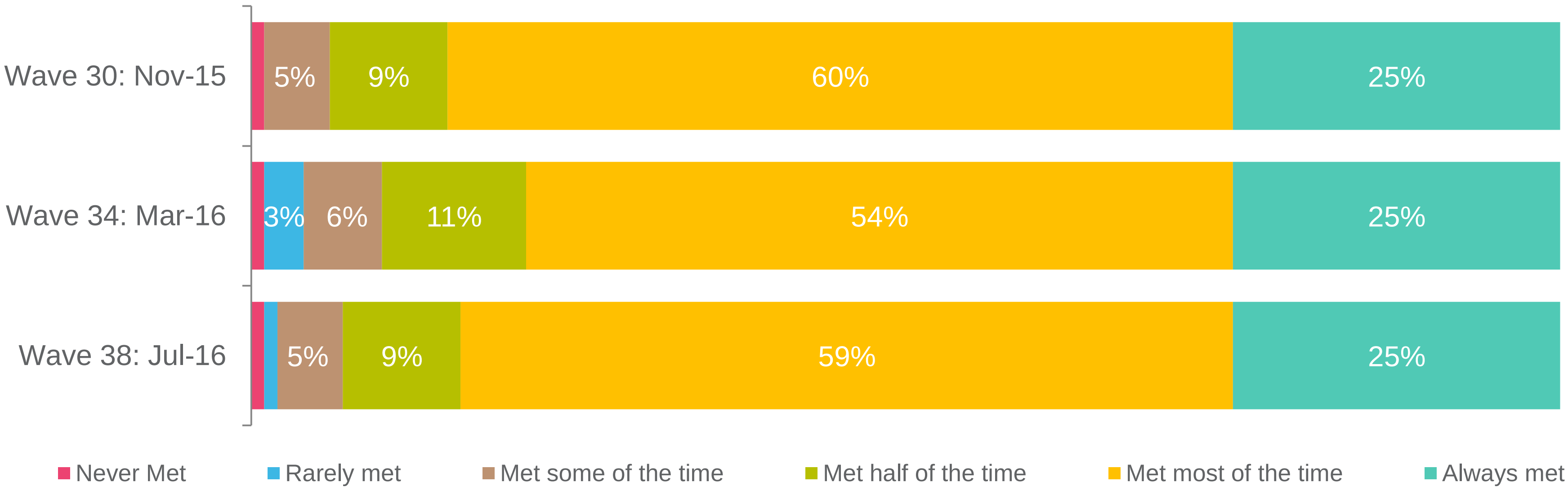
Q14. When purchasing <commodity>, how important is Provenance to you?
Q15. And when purchasing Sweet Corn, how important is that it is grown in Australia?
Sample Wave 30 N=302, Wave 34 N=310, Wave 38 N=303

Sweet corn is expected to stay fresh for just over a week, which has slightly increased over the last three waves. Expectations of freshness are being met most of the time.

Expected to stay fresh for **8.3** days

- ▼ 7.8 days, Wave 30
- ▼ 8.2 days, Wave 34

Expectations Met



Q12. How long do you expect <commodity> to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy <commodity> ?
Sample Wave 26 N=304, Wave 30 N=302, Wave 34 N=310

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

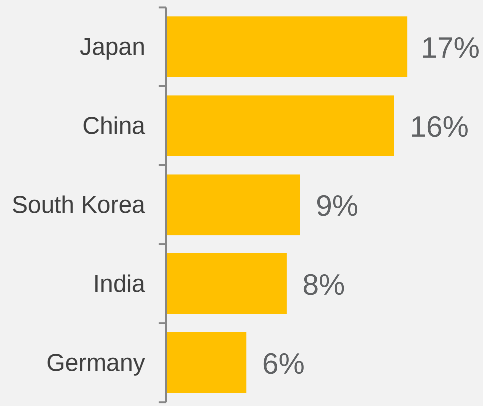
Sweet Corn Product Launch Trends.

Sweet Corn Global Launches

April – July 2016

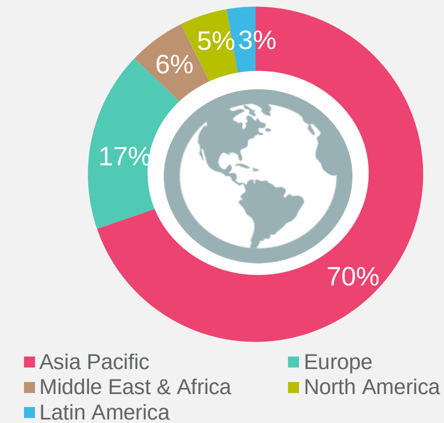
There were 109 sweet corn products launched globally over the last three months. The countries with the most launches were Japan and China. Key categories for launches were fruit & vegetables products, and snacks. Flexible packaging was most popularly utilised.

Country

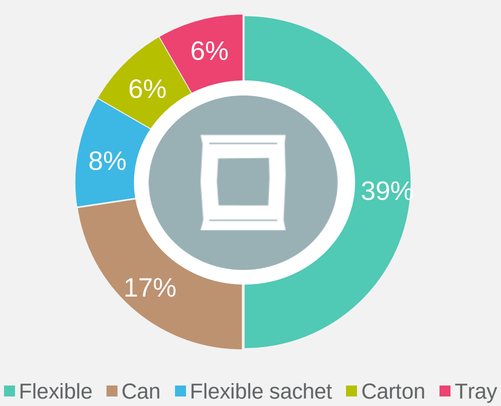


109 Global NPDs

Region



Top Pack Formats



Categories

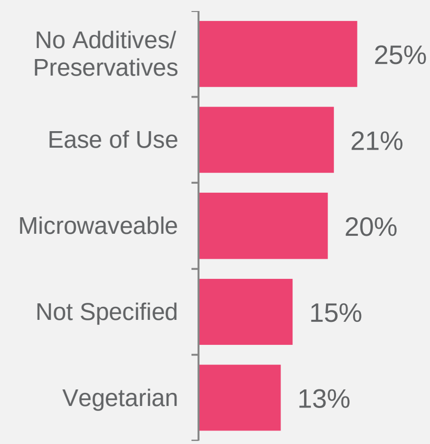
Fruit & Vegetables 31%

Snacks 22%

Meals 14%

Baby Food 7%

Top Claims



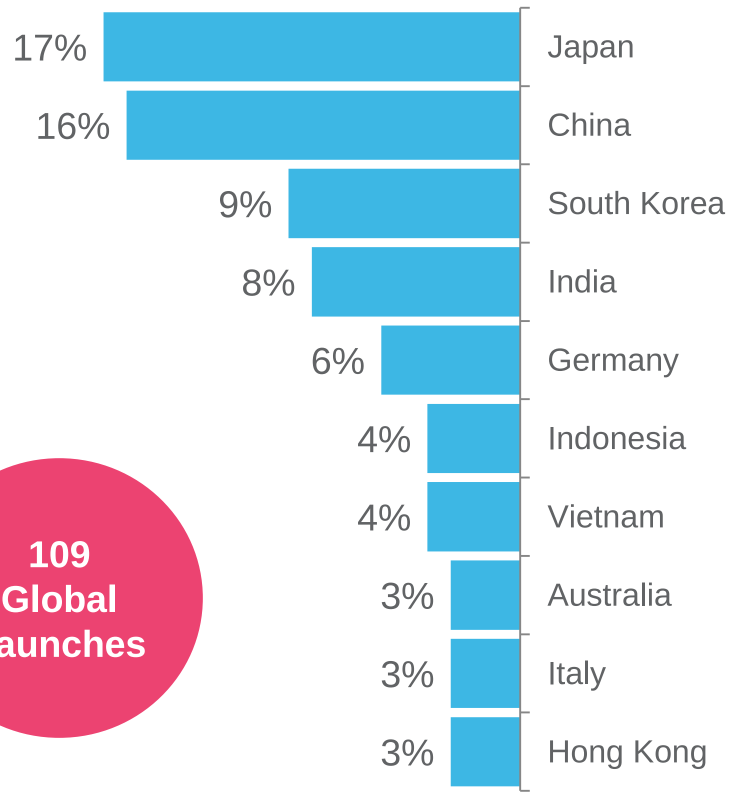
Sweet Corn Product Launches:
Last 3 Months (April – July 2016)
Summary

- There were 109 product launches in the past 3 months globally that contained sweet corn as an ingredient, relatively consistent with the previous wave.
- There were 3 products launched in Australia over the past three months.
- Asia Pacific (70%) and Europe (17%) were the key regions for launches.
- Flexible packaging (39%) remained the most common format used for products.
- The main categories for launches were fruits & vegetables (31%), snacks (22%) and meals (14%).
- Claims used on products included no additives/preservatives (25%), ease of use (21%) and microwaveable (20%).
- The most innovative product launched was Corn Toast Bread from South Korea. Other examples can be found in the following pages.

Source: Mintel (2016)

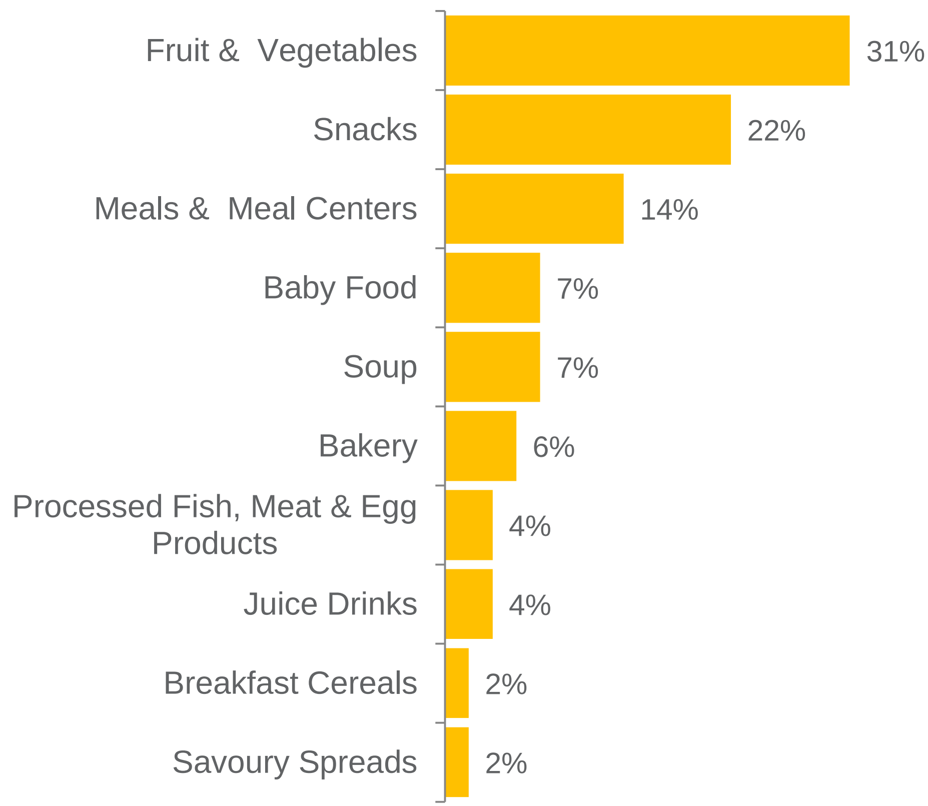
Japan and China were the countries that had the most launches. The key categories for sweet corn launches were fruit & vegetables, snacks and meals.

Top Launch Countries



109 Global Launches

Top Launch Categories



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

Pack Formats Used

Region	Pack format	%
Global	Flexible	39%
Global	Can	17%
Global	Flexible sachet	8%
Asia Pacific	Flexible	49%
Asia Pacific	Can	11%
Asia Pacific	Flexible sachet	11%

Top Claims Used

Region	Claim	%
Global	No Additives/Preservatives	25%
Global	Ease of Use	21%
Global	Microwaveable	20%
Asia Pacific	No Additives/Preservatives	26%
Asia Pacific	Microwaveable	21%
Asia Pacific	Ease of Use	21%

Only regions with n >30 are displayed

Innovative Sweet Corn Launches:
L3M (April – July 2016)

Pokka Sapporo Choice! Minnano Soup Assorted Cold Soup (Japan)

Pokka Sapporo Choice! Minnano Soup Assorted Cold Soup has been relaunched with a new brand name for Spring/Summer 2016. It contains four potato soups, two corn soups and two pumpkin soups, and is designed to be prepared in milk, soy milk or water.

Claims:
Seasonal, Ethical - Environmentally Friendly Package

Rice Snack Corn Rice Chip (South Korea)

Rice Snack Corn Rice Chip is made with 100% domestic grains. These baked chips contain 69.3% corn and 7.7% white rice. The product retails in a 48g resealable pack.

Claims:
Convenient Packaging

Dennree Al Forno Vegetarian Pizza (Germany)

Dennree Al Forno Pizza Vegetaria (Vegetarian Pizza) has been repackaged in a newly designed 350g recyclable pack featuring the EU Green Leaf, Bio and FSC logos. This pizza with crispy base is topped with chopped tomatoes, mushrooms, corn, onions, paprika, spinach, melting Edam and Frankendammer cheese with refined herbs and spices. The product has been pre-baked in a stone oven.

Claims:
Organic, Vegetarian, Ethical - Environmentally Friendly Package

President's Choice Sweet Corn Medium Salsa (Canada)

President's Choice Sweet Corn Medium Salsa is excellent as a dip for tortilla chips or as a topper for tacos, salads, burritos and fajitas. This medium spicy product contains no artificial flavours or colours, is suitable for vegetarian, and retails in a 300ml pack.

Claims:
No Additives/Preservatives, Vegetarian

Source: Mintel (2016)

Innovative Sweet Corn Launches:
L3M (April – July 2016)

Samlip Corn Toast Bread (South Korea)

Samlip Corn Toast Bread is made with 6.49% corn paste, 1.95% alpha corn and 11.67% margarine. This product is said to feature the best thickness for toast and be more delicious when toasted. It retails in a pack containing 2 x 420g packets.

Claims:
Premium

Topvalu Corn & Mayonnaise Bread (Japan)

Topvalu Corn & Mayonnaise Bread is now available. It is filled and topped with mayonnaise and corn from the USA. This product retails in an 86g pack. Launched on April 6, 2016 with an RRP of 127 yen.

Claims:
Economy

Ching's Secret Hunger Ki Bajao! Sweet Corn Veg Instant Soup (India)

Ching's Secret Hunger Ki Bajao! Sweet Corn Veg Instant Soup has been repackaged with an updated design. This soup is claimed to be ready in one minute by just adding boiling water. The vegetarian product retails in a 30g pack that serves two.

Claims:
Vegetarian, Time/Speed, Ease of Use

Dibaiyi Freshly Squeezed Corn Juice Drink (China)

Dibaiyi Xian Zha Yu Mi Jiang Yin Liao (Freshly Squeezed Corn Juice Drink) is made with freshly squeezed corn to retain the natural nutritions, and is said to be mellow, aromatic, nutritious and can replenish dietary fibre. This product contains greater than or equal to 35% fruit juice content, and retails in a 250ml pack featuring the Wechat QR code.

Claims:
Other (Functional), Social Media

Source: Mintel (2016)

Innovative Sweet Corn Launches:

L3M (April – July 2016)

Joy Food Corn Cheese Baguette (South Korea)

Joy Food Corn Cheese Baguette is now available. This microwaveable product is ready in 30 or 40 seconds and retails in a 135g pack.

Claims:
Microwaveable

Farmhouse Bread with Sweetcorn Milk Spread (Thailand)

Farmhouse Khanom Pung Tar Ngha Cream Nom Khao Pod (Bread with Sweetcorn Milk Spread) contains lutein to maintain eyesight. The product retails in a 60g pack bearing a Facebook link.

Claims:
Other (Functional), Social Media

Y-Cook! Boiled Sweet Corn Kernels with African Peri Peri Seasoning (India)

Y-Cook! Boiled Sweet Corn Kernels with African Peri Peri Seasoning have been relaunched with a new design and new brand name previously known as Y-Cook! Healthy # 1. The GMO-free and vegetarian product is ready to eat, and contains no preservatives. It can be microwaved, contains no allergens and retails in a 200g pack.

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

Lean Cuisine Cheese and Fire-Roasted Chile Tamale (USA)

Lean Cuisine Cheese and Fire-Roasted Chile Tamale with a sweet and spicy chile sauce and cilantro-lime rice is made with no GMO and organic chile and brown rice ingredients. The limited edition product contains milk from cows not treated with rbST and no preservatives, can be microwave heated and retails in a 9 7/8-oz. recyclable pack featuring the Facebook and Oregon Tilth logos and 9 PointsPlus.

Claims:
No Additives/Preservatives, Microwaveable, Organic, Ethical - Environmentally Friendly Package, Limited Edition, Hormone Free, GMO-Free, Slimming, Social Media

Source: Mintel (2016)

Australian Sweet Corn Launches:
L3M (April – July 2016)

Hart & Soul All Natural Chicken & Corn Soup

Hart & Soul All Natural Chicken & Corn Soup is described as a Chinese style creamy sweet corn and shredded chicken soup that is ready to serve. It is 100% natural and free from gluten, GMO ingredients, artificial colours, flavours and preservatives. The microwaveable product retails in a 400g pack, featuring the Facebook and Instagram logos.

Claims:
No Additives/Preservatives, All Natural Product, Microwaveable, Gluten-Free, Low/No/Reduced Allergen, Ease of Use, GMO-Free, Social Media

Val Verde Steamed Corn Kernels

Val Verde Steamed Corn Kernels are said to contain more veggies and less water, to lock in the flavour. Steaming ensures the vegetables are tender and flavour is preserved, and the corn does not need to be cooked but can just be heated or served straight from the can. The product retails in a pack containing 3 x 160g cans.

Claims:
Ease of Use

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

Chris' Fun-Size Snacks 'Lil' Christos Corn Relish Dips are described as unique sweet and sour dip that combines sweet corn and fresh capsicum. The vegetarian dips contain no artificial colours, flavours or gluten. This product retails in a 180g pack that contains three 60g snack dips.

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

Source: Mintel (2016)

Green Peas.

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

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

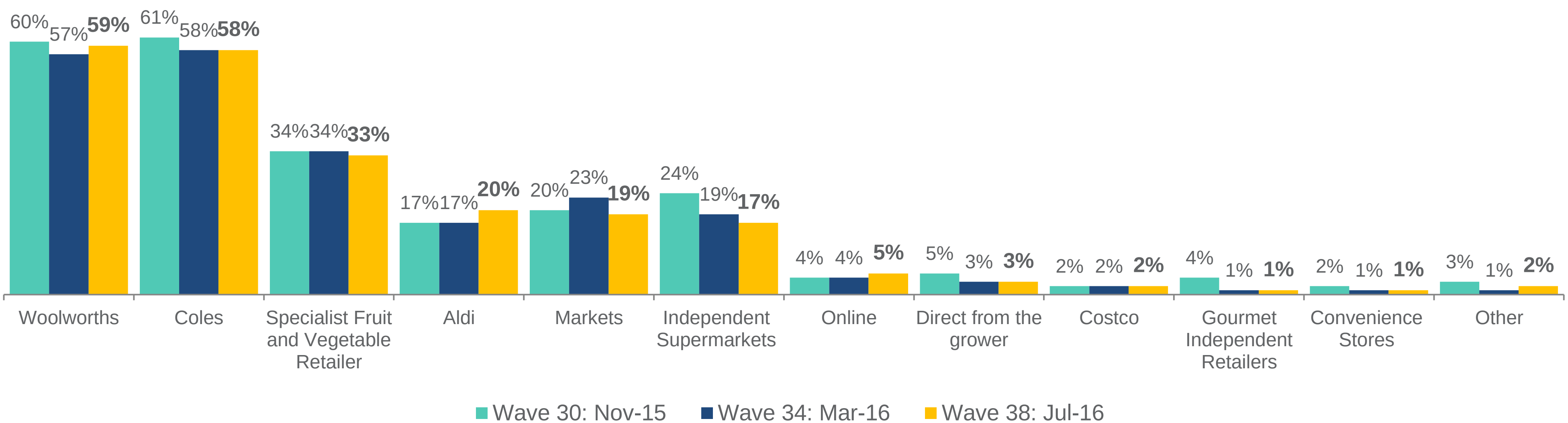
Average Purchase **4.0** times per month

▲ 4.7 times, Wave 30
▲ 4.2 times, Wave 34

Average Consumption **9.7** times per month

▲ 10.6 times, Wave 30
▲ 9.9 times, Wave 34

Purchase Channels



Q1. On average, how often do you purchase green peas?
Q2. On average, how often do you consume green peas?
Q5. From which of the following channels do you typically purchase green peas?
Sample Wave 30 N=306, Wave 34 N=307, Wave 38 N=304

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

Average Spend and Price Sensitivity.

Average weight of purchase

The average consumer typically purchases **700g** of green peas, relatively consistent with past waves.

— 700g, Wave 30
▼ 600g, Wave 34

Recalled last spend

Recalled last spend on green peas is **$3.90**, which is marginally higher than the previous wave.

▲ $4.20, Wave 30
▼ $3.80, Wave 34

Value for money

Consumers' perceived value for money is good for green peas **(6.5/10)**, consistent with Wave 34.

▼ 6.3/10, Wave 30
— 6.5/10, Wave 34

Q3. How much leek do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 30 N=306, Wave 34 N=307, Wave 38 N=304

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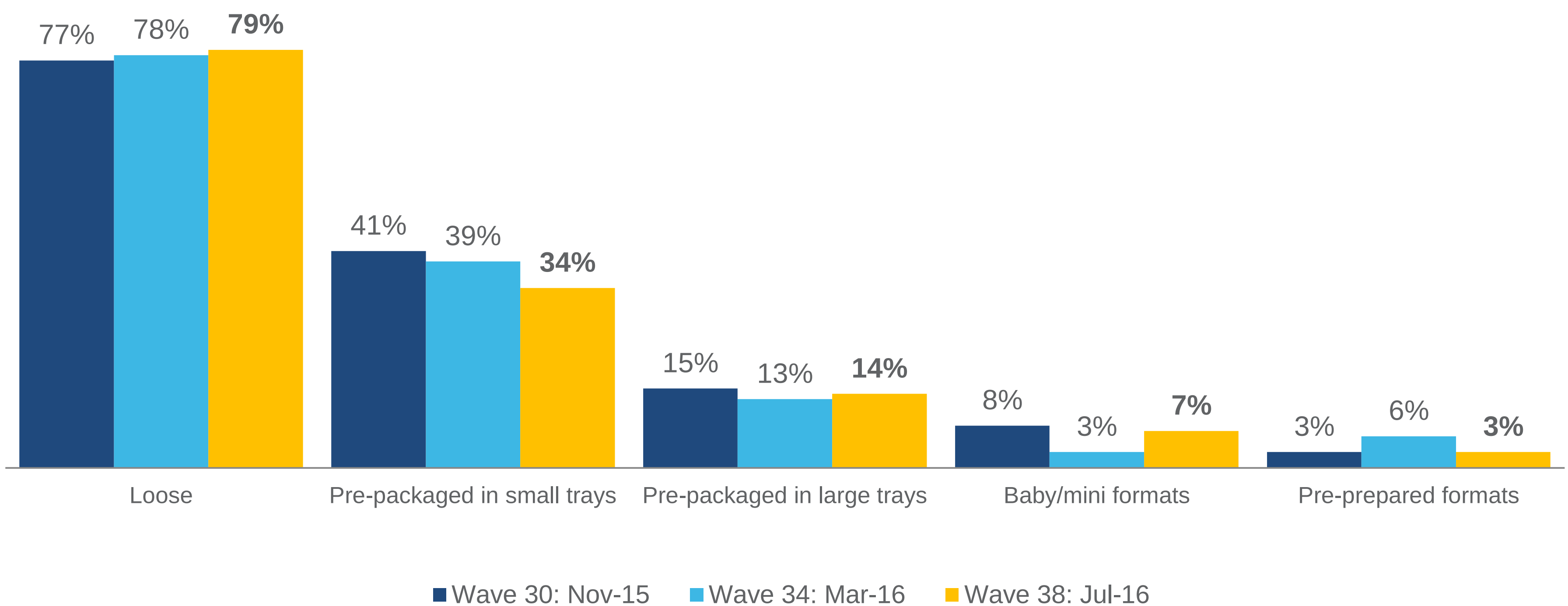
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

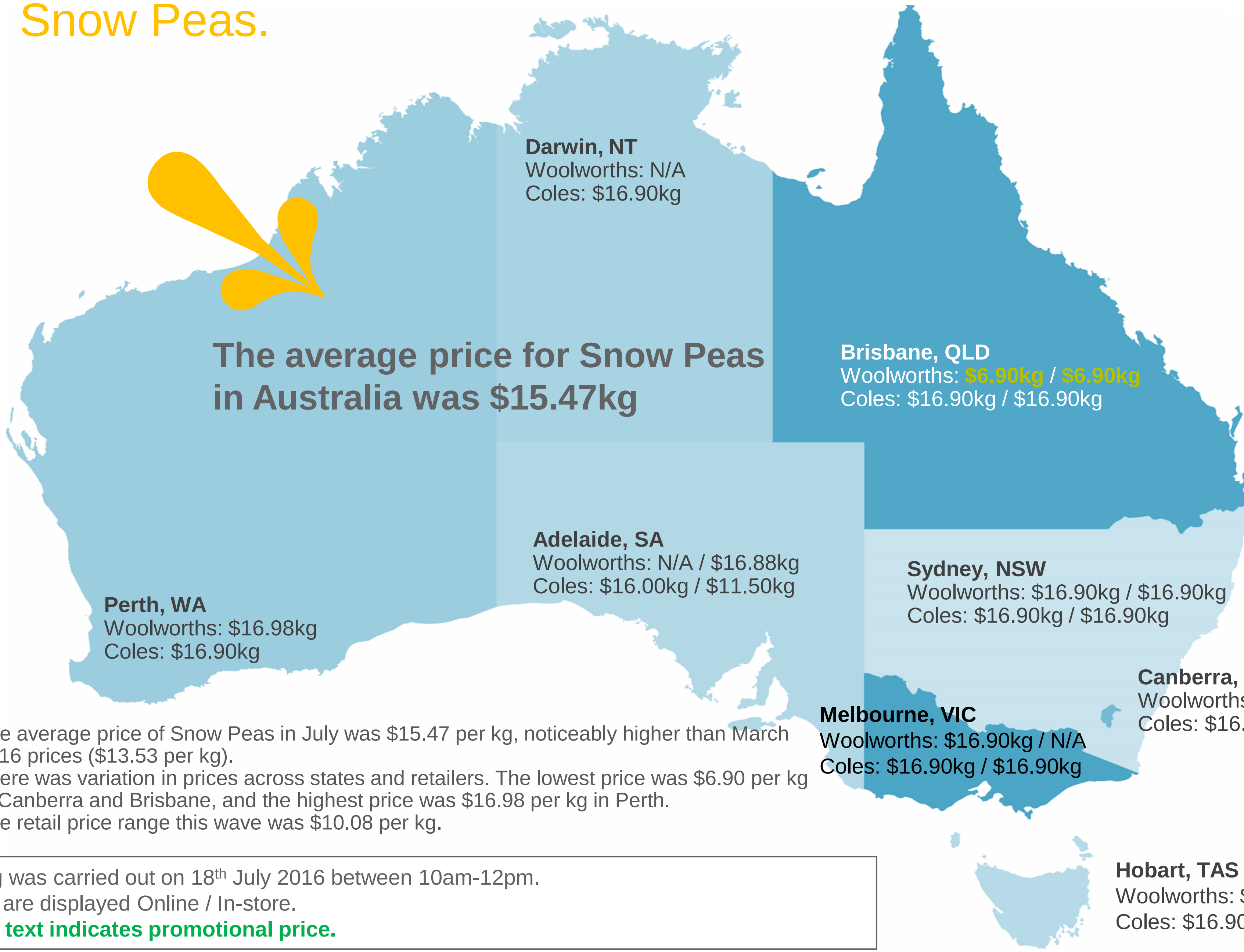
Individual green peas are the most common purchase format. There has been a decline in purchase of pre-packaged small trays over the last three waves.



Q4b. In what fresh formats do you typically purchase green peas?
Sample Wave 30 N=306, Wave 34 N=307, Wave 38 N=304

Online and In-store Commodity Prices.

Snow Peas.



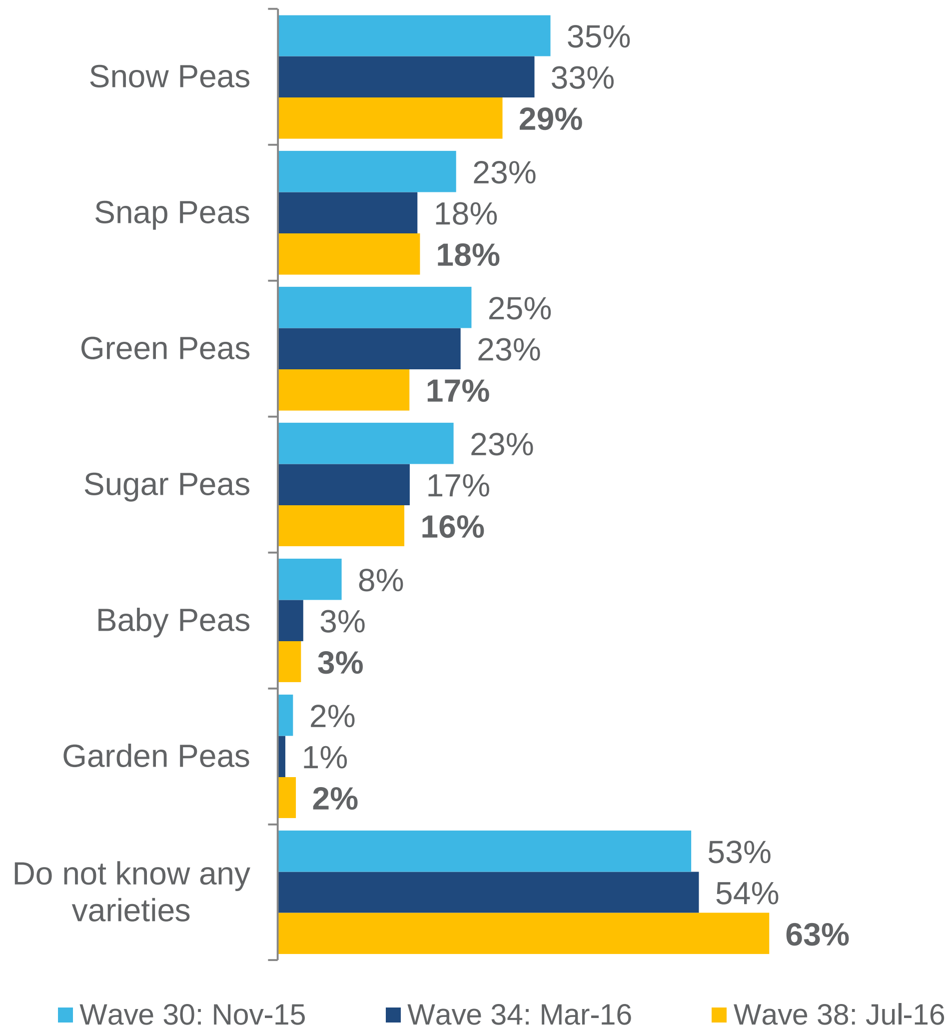
The average price for Snow Peas in Australia was $15.47kg

- The average price of Snow Peas in July was $15.47 per kg, noticeably higher than March 2016 prices ($13.53 per kg).
- There was variation in prices across states and retailers. The lowest price was $6.90 per kg in Canberra and Brisbane, and the highest price was $16.98 per kg in Perth.
- The retail price range this wave was $10.08 per kg.

Pricing was carried out on 18th July 2016 between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates promotional price.

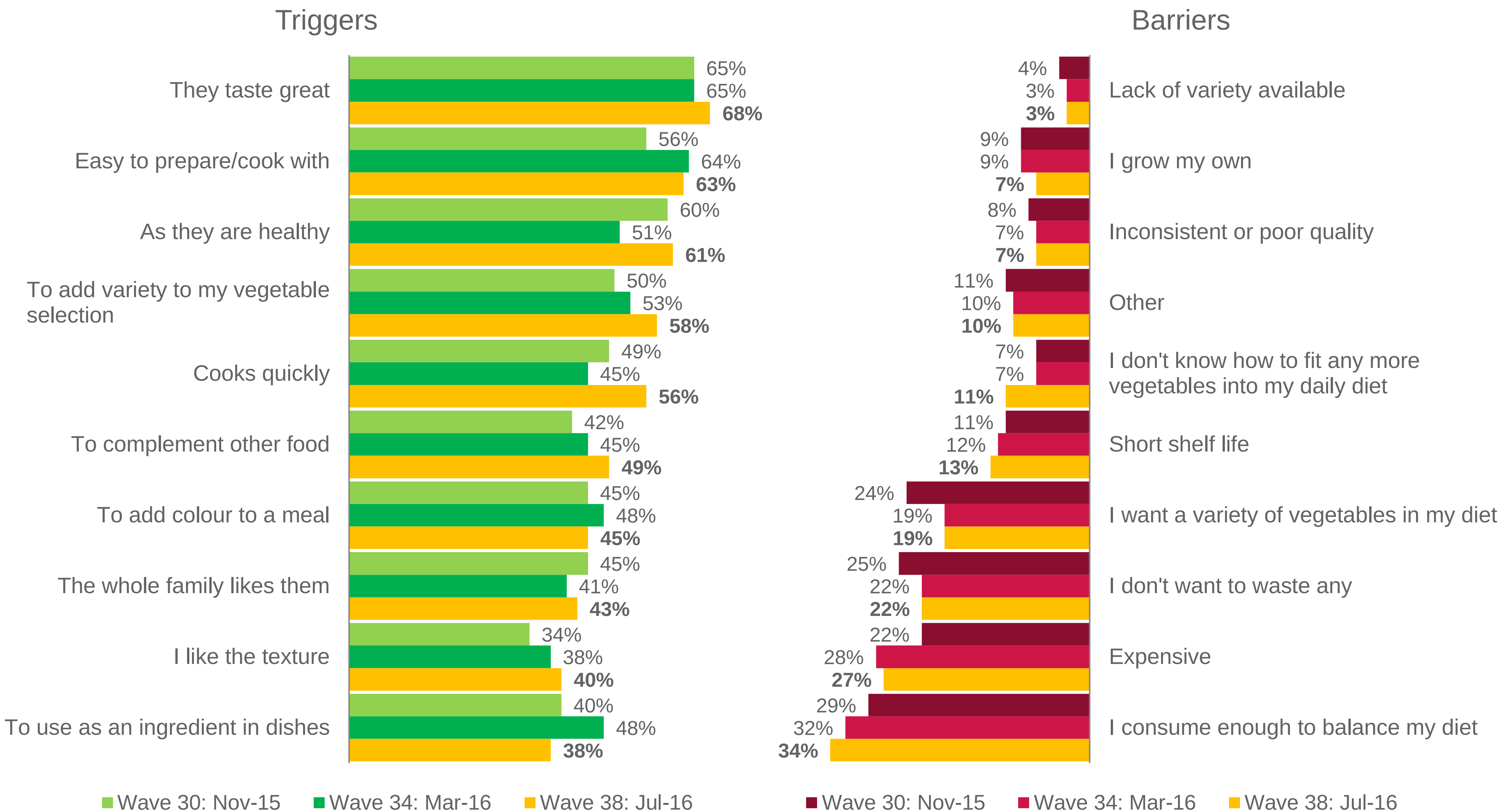
Snow Peas and Snap Peas are the most commonly recalled varieties.

Almost two thirds of consumers are unable to recall a type of pea, which has increased this wave.



Q6a. What types/varieties of <commodity> are you aware of? (unprompted)
Sample Wave 30 N=306, Wave 34 N=307, Wave 38 N=304

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



Q7. Which of the following reasons best describes why you purchase green peas?
Q8. Which reason best describes why you don't buy green peas more often?
Sample Wave 30 N=306, Wave 34 N=307, Wave 38 N=304

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

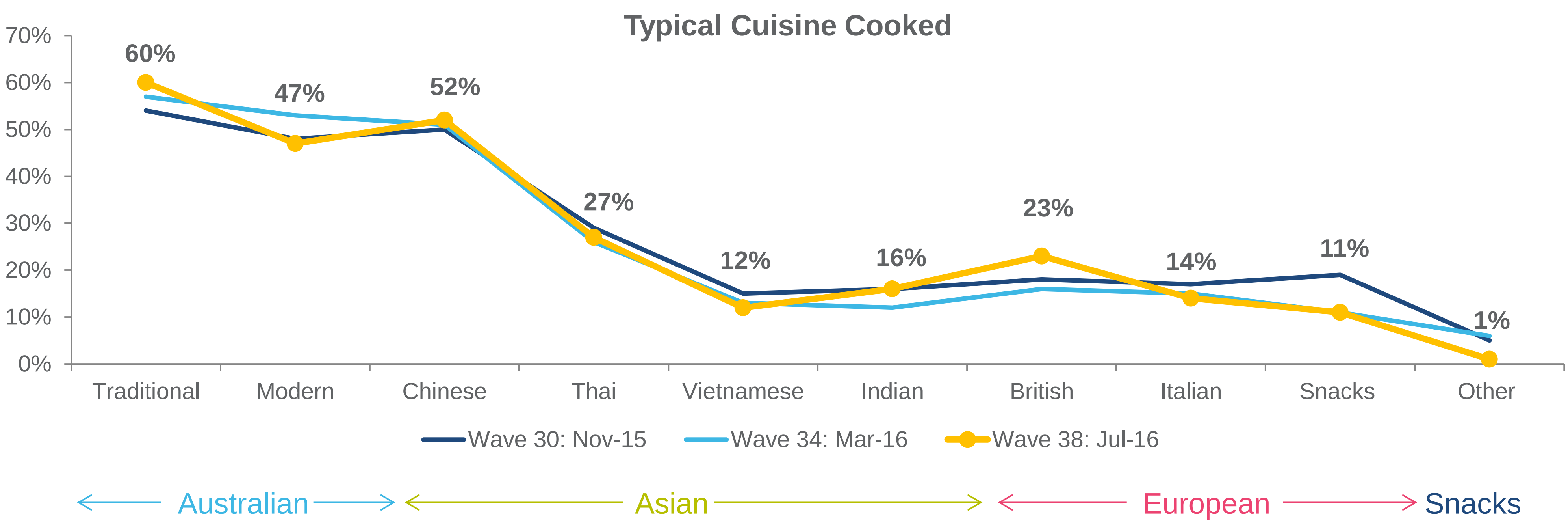
Consumption tends to occur during dinner.

Top 5 Consumption Occasions

	Wave 34	Wave 38
Dinner	78%	**74%**
Family meals	61%	**62%**
Weekday meals	52%	**57%**
Weekend meals	46%	**49%**
Quick Meals	44%	**47%**

16% used green peas when cooking a new recipe

▲ 21%, Wave 34



Q10. What cuisines do you cook/consume that use green peas?
Q11. Which of the following occasions do you typically consume/use green peas?
Sample Wave 30 N=306, Wave 34 N=307, Wave 38 N=304

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

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

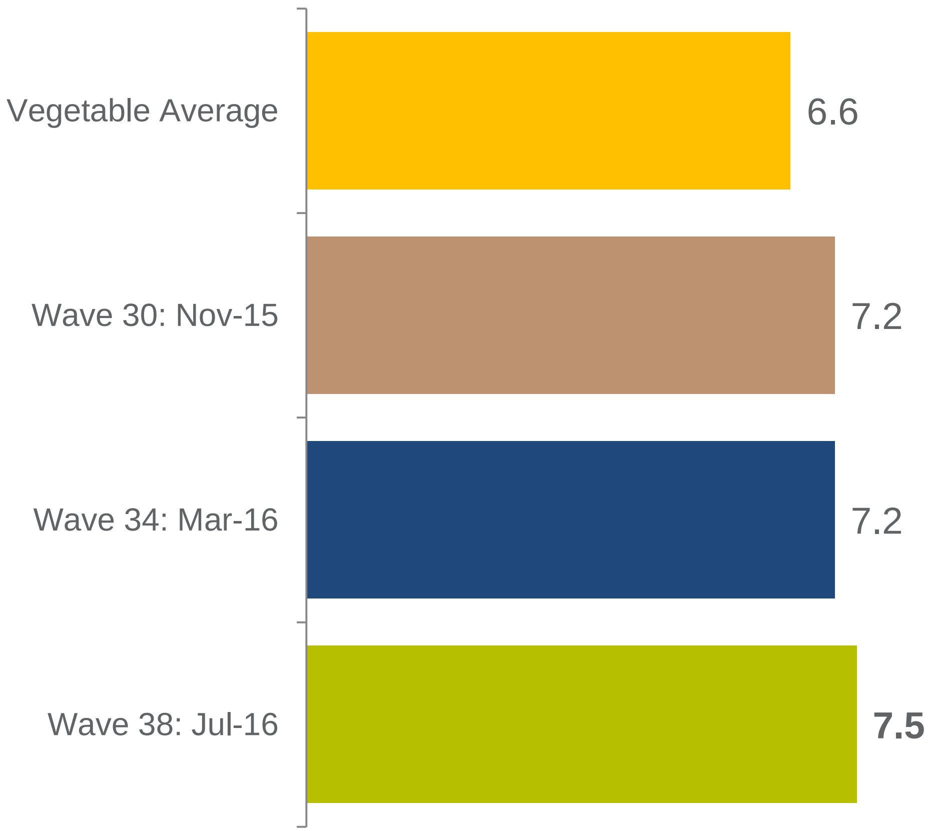
Accompanying Vegetables

Carrot	70% ▲
Potato	52% –
Capsicum	34% ▼
Cauliflower	34% –
Pumpkin	34% ▼

Top 10 Cooking Styles			
	Wave 30	Wave 34	**Wave 38**
Stir frying	59%	57%	**60%**
Steaming	54%	53%	**52%**
Boiling	40%	42%	**41%**
Raw	40%	35%	**33%**
Microwave	26%	25%	**30%**
Soup	16%	19%	**18%**
Slow Cooking	13%	15%	**13%**
Sautéing	12%	13%	**13%**
Frying	9%	9%	**9%**
Mashing	5%	5%	**7%**

Q9. How do you typically cook green peas?
Q10a. And when are you serving green peas which of the following do you also serve together with this?
Sample Wave 30 N=306, Wave 34 N=307, Wave 38 N=304

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



8.4

Q14. When purchasing green peas, how important is Provenance to you?
Q15. And when purchasing green peas, how important is that it is grown in Australia?
Sample Wave 30 N=306, Wave 34 N=307, Wave 38 N=304

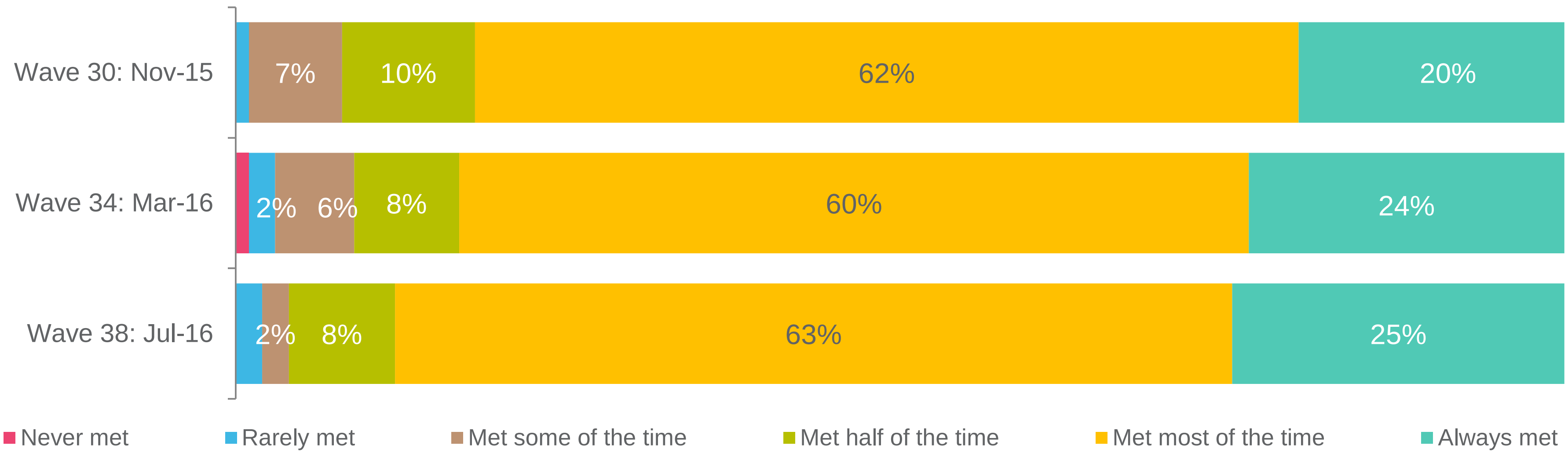
Consumers expect green peas to remain fresh for over a week once purchased, with these expectations increasingly being met.

Expected to stay fresh for **8.8** days

▼ 8.2 days, Wave 30

▼ 8.3 days, Wave 34

Expectations Met



Q12. How long do you expect green peas to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy green peas?
Sample Wave 30 N=306, Wave 34 N=307, Wave 38 N=304

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

Green Peas Product Launch Trends.

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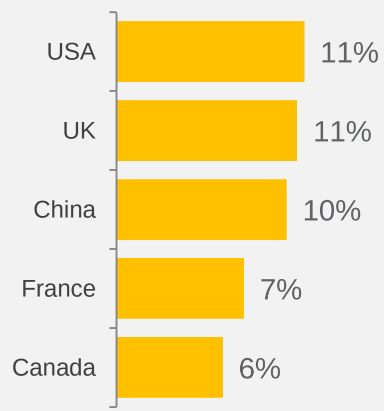
Green Peas Global Launches
April – July 2016

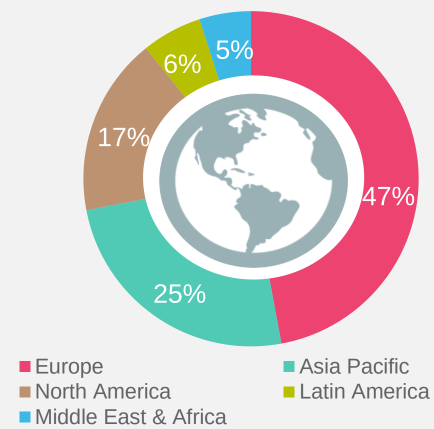
There were 482 green pea products launched globally over the last three months. The majority of launches were from the USA and UK. Categories for launches were snacks and processed products. Key packaging for green pea products was flexible formats.

Country

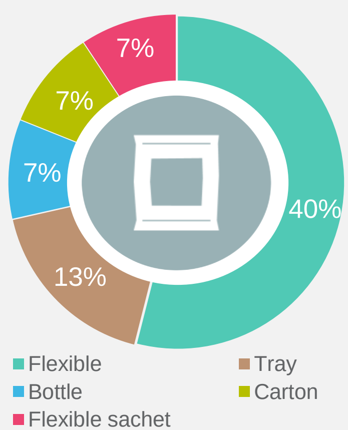


482 Global NPDs

Region



Top Pack Formats



Categories

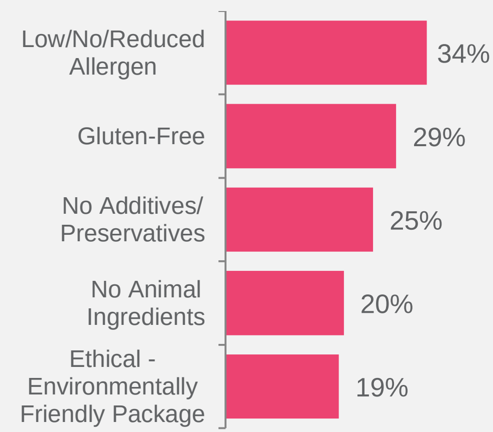
Snacks 21%

Processed Products 14%

Meals 11%

Bakery 10%

Top Claims

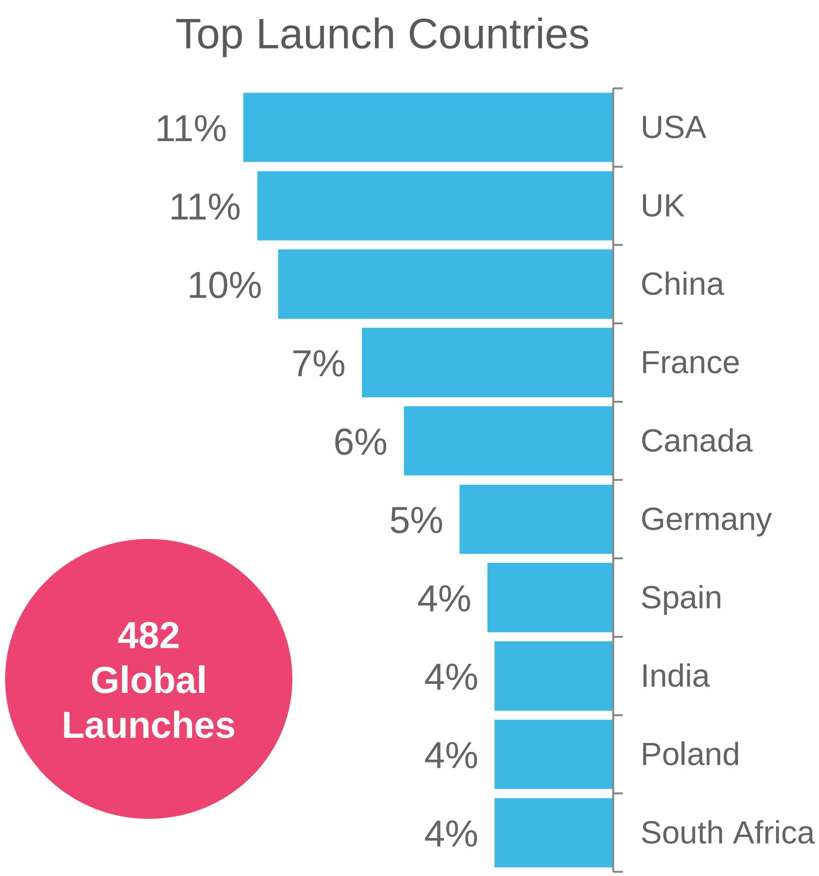


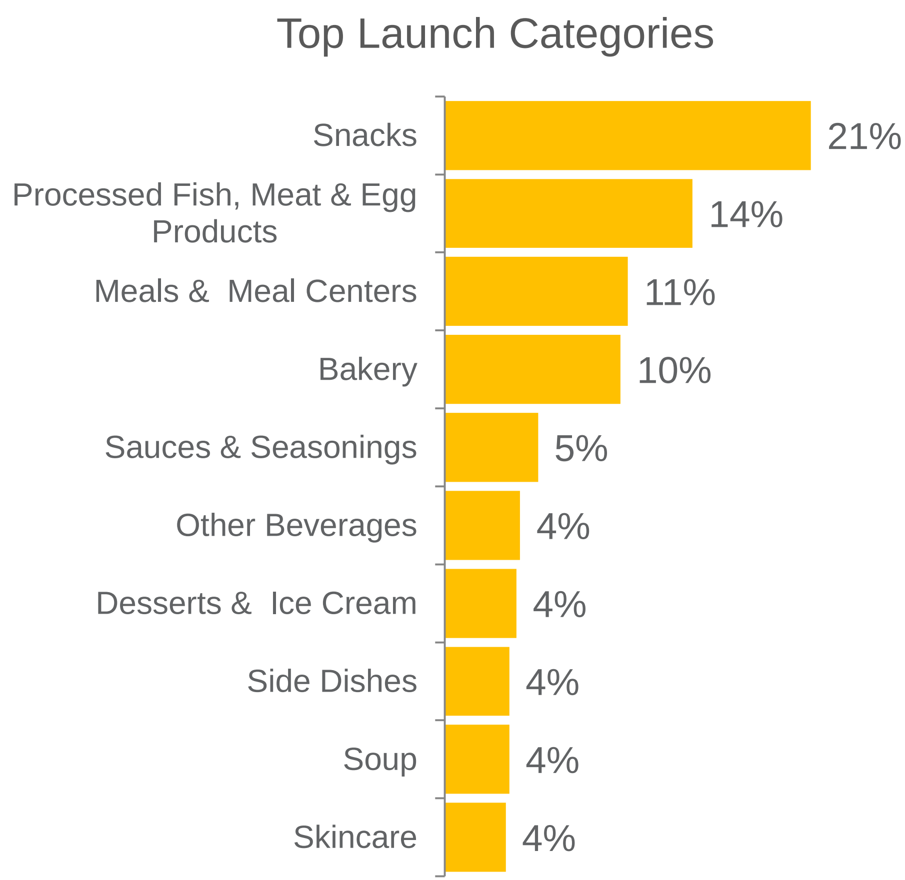
Green Peas Product Launches:
Last 3 Months (April – July 2016)
Summary

- There were 482 launches in the past 3 months globally that contained green peas as an ingredient, lower than the previous wave (540).
- There were 13 products launched in Australia over the past three months.
- Europe (47%) and Asia Pacific (25%) were the key regions for launches.
- Flexible packaging (40%) was the most common format used for products.
- The main categories for launches were snacks (21%), processed products (14%), and meals (11%).
- Claims used on products highlighted health; low/no/reduced allergen (34%), gluten free (29%), and no additives/preservatives (25%).
- The most innovative product launched included Protein Peanut Butter with Cocoa and Vegetable Protein from Brazil. Examples of these can be found in the following pages.

Source: Mintel (2016)

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





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

Pack Formats Used

Global	Flexible	40%
	Tray	13%
	Bottle	7%
Europe	Flexible	37%
	Tray	22%
	Carton	8%
Asia Pacific	Flexible	47%
	Bottle	15%
	Flexible sachet	8%

Top Claims Used

Global	Low/No/Reduced Allergen	34%
	Gluten-Free	29%
	No Additives/Preservatives	25%
Europe	Low/No/Reduced Allergen	33%
	Gluten-Free	28%
	No Additives/Preservatives	21%
Asia Pacific	No Additives/Preservatives	25%
	Vegetarian	21%
	Ease of Use	13%

Only regions with n >30 are displayed

Innovative Green Peas Launches:
L3M (April – July 2016)

Bon Appé Herb & Garlic Focaccia (Canada)

Bon Appé Herb & Garlic Focaccia has been repackaged and is now available in a newly designed pack. It is said to be lovingly prepared using only the finest all natural ingredients and features a crispy crust. The kosher certified product retails in a newly redesigned 454g pack featuring Twitter, Facebook and Instagram logos and a QR code.

Claims:
All Natural Product, Kosher, Social Media

Qia Qia Beef Flavoured Pea (China)

Qia Qia Niu Rou Qing Dou (Beef Flavoured Pea) is said to be nutritious and healthy. This product retails in a 70g pack containing individual units.

Claims:
N/A

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

Nicksnack Sin Gluten Natura Cheese Flavored Rice and Green Peas Baked Snack (Peru)

Nicksnack Sin Gluten Natura Aperitivo Horneado de Arroz y Gruisantes con Sabor a Queso (Cheese Flavored Rice and Green Peas Baked Snack) is a crocodile shaped snack which is free from preservatives, coloring and gluten. This healthy, tasty and fun product retails in a 50g pack featuring a QR code.

Claims:
No Additives/Preservatives, Children (5-12), Gluten-Free, Low/No/Reduced Allergen

Source: Mintel (2016)

Innovative Green Peas Launches:
L3M (April – July 2016)

Chocolife Protein Peanut Butter with Cocoa and Vegetable Protein (Brazil)

Chocolife Protein Pasta de Amendoim com Cacau e Proteínas Vegetais (Peanut Butter with Cocoa and Vegetable Protein) is now available. This gluten-free product contains 8g of vegetable proteins, per portion, with 0% of added sugar, lactose, milk protein, soya, animal origin and trans fat. The product retails in a 300g pack featuring the Facebook link.

Claims:
Low/No/Reduced Sugar, Gluten-Free, Low/No/Reduced Transfat, Low/No/Reduced Allergen, No Animal Ingredients, Low/No/Reduced Lactose, Social Media

Great Value Garlic Flavoured Green Peas (China)

Great Value Suan Xiang Wei Qing Wan Dou (Garlic Flavoured Green Peas) have been repackaged in a newly designed 128g pack containing individual units. This product is made using 100% American green peas and is processed according to a traditional technique and hand picked method.

Claims:
Economy

Più Bene Ricco In Proteine Organic Green Peas Fusilli (Italy)

Più Bene Ricco In Proteine Fusilli Biologici di Piselli Verdi (Organic Green Peas Fusilli) is new to the range. This organic certified product is rich in protein, has a high fiber content, is a source of iron and is free of gluten. It cooks in four to five minutes, and retails in a 250g FSC certified pack, bearing the EU Green Leaf logo and a recipe idea.

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

Beyond Chicken Feisty Buffalo Poppers (Germany)

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

Claims:
Vegan, No Animal Ingredients, GMO-Free

Source: Mintel (2016)

Innovative Green Peas Launches:
L3M (April – July 2016)

Lonny Green Peas Cookies (China)

Lonny Wan Dou Su (Green Peas Cookies) are halal certified. This product retails in a 160g pack containing 16 units.

Claims:
Halal

Monini Rice & More Bulgur Mix (Poland)

Monini Rice & More Bulgur Mix contains long grain brown rice, wheat bulgur, lupine bulgur and green pea bulgur. The mix is rich in fibre, can be easily and quickly prepared, also in a microwave, and used in cold salads, as a side dish for meats, fish and creamy soups, as well as a base for burgers, croquettes and stuffing.

Claims:
High/Added Fiber, Kosher, Microwaveable, Ethical - Environmentally Friendly Product, Time/Speed, Ease of Use, Social Media

Souper Supergreens Soup (UK)

Souper Supergreens Soup has been repackaged in a newly designed 390g recyclable, highly renewable pack. This high protein, low fat soup contains no artificial additives, and is claimed to make consumers feel fuller for longer. The vegetarian product can be heated on the hob or in the microwave.

Claims:
No Additives/Preservatives, Low/No/Reduced Fat, Microwaveable, Vegetarian, Ethical - Environmentally Friendly Package, High Protein, High Satiety

Organic Gemini Original Tigernut Smoothie Mix (USA)

Organic Gemini Original Tigernut Smoothie Mix is said to be a powerful smoothie booster that promotes the gut's well-being and supports the immune system. The combination of pea protein with prebiotic fiber is said to make one feel fuller longer and increase the desire to eat quality foods. The kosher certified product is free from gluten, nuts and GMOs, and is suitable for both a paleo and vegan diets.

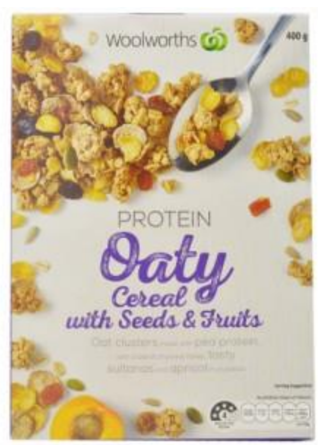
Claims:
Kosher, Organic, Premium, Gluten-Free, Digestive (Functional), Immune System (Functional), Low/No/Reduced Allergen, Vegan, No Animal Ingredients, High Satiety, Prebiotic, GMO-Free, Slimming

Source: Mintel (2016)

Australian Green Peas Launches:
L3M (April – July 2016)

Woolworths Protein Oaty Cereal with Seeds & Fruits

Woolworths Protein Oaty Cereal with Seeds & Fruits is described as oat clusters made with pea protein, with a blend of cereal flakes, tasty sultanas and apricot fruit pieces. It contains 30% whole grains, is a good source thiamin for energy and folate to help maintain normal immune system function, a source of fibre for a healthy digestive system, protein for tissue building and repair, niacin and iron to help reduce tiredness and fatigue, and one 50g serve contributes more than 30% of the daily whole grain target intake.



Claims:
No Additives/Preservatives, Other (Functional), Wholegrain, Digestive (Functional), Immune System (Functional), Ethical - Environmentally Friendly Package

Campbell's Gourmet Mexican Chicken Rice and Corn Soup

Campbell's Gourmet Mexican Chicken Rice and Corn Soup is now available. This 98% fat-free soup can be heated in the microwave. The product is free of artificial flavours, colours or preservatives, contains more than three serves of vegetables and has been made from 100% Australian chicken. It retails in a 425g pack with a 4 Health Star Rating.

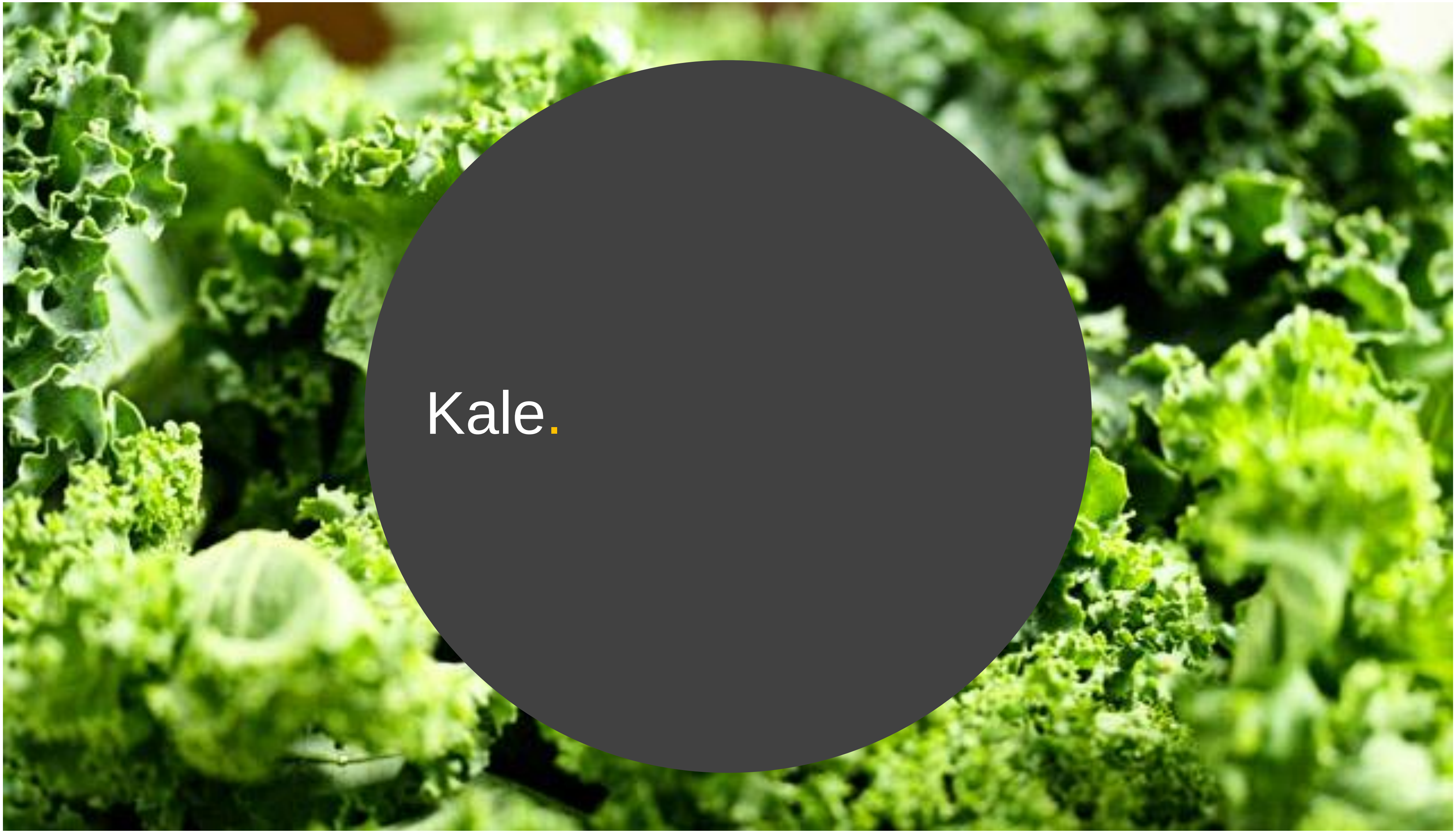
Claims:
No Additives/Preservatives, Low/No/Reduced Fat, Microwaveable

Sanitarium Lunchbox Legends Mini Ripples Sour Cream & Chives Flavour Snack

Sanitarium Lunchbox Legends Mini Ripples Sour Cream & Chives Flavour Snack is made with 47% wholegrain and has a 4 out of 5 health star rating. It contains 40% less fat; is free from added MSG, palm oil, artificial colours, flavours and preservatives; and is cooked in high oleic sunflower oil and/or canola oil. The product is said to help mums provide foods to their kids, and retails in a pack containing eight 19g snack packs.

Claims:
No Additives/Preservatives, Low/No/Reduced Fat, Children (5-12), Wholegrain, On-the-Go

Source: Mintel (2016)


Kale.

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

Kale is typically purchased from mainstream retailers. There has been a slow decline in purchase from independent supermarkets and Aldi over the last three waves.

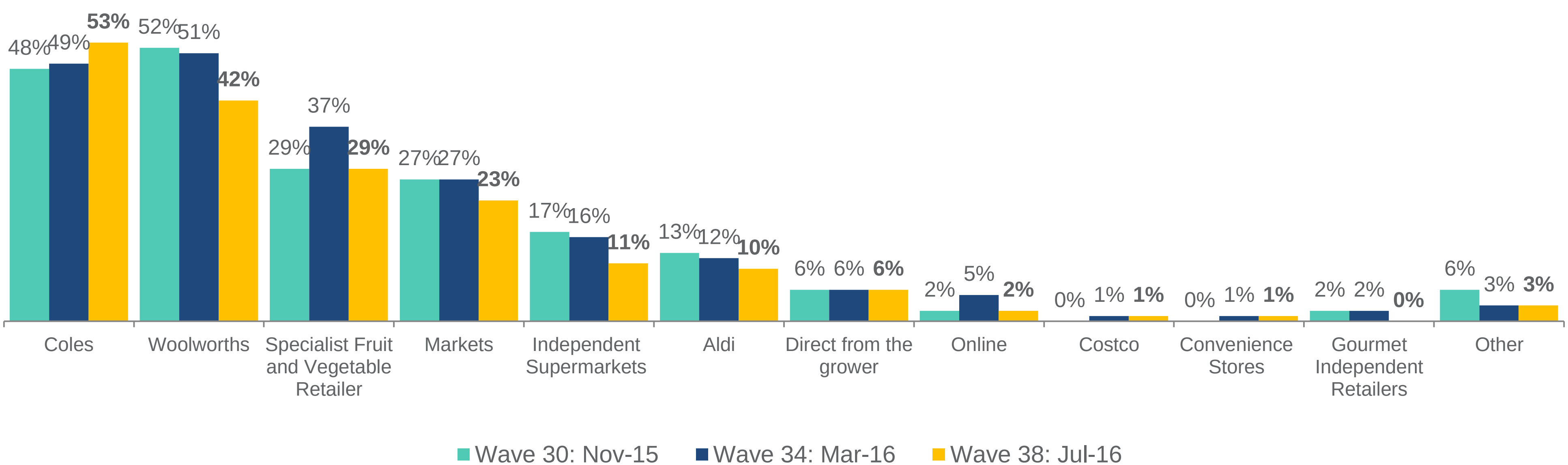
Average Purchase **3.9** times per month

▲ 4.3 times, Wave 30
▲ 4.2 times, Wave 34

Average Consumption **9.1** times per month

▲ 9.4 times, Wave 30
▼ 9.0 times, Wave 34

Purchase Channels



Q1. On average, how often do you purchase kale?
Q2. On average, how often do you consume kale?
Q5. From which of the following channels do you typically purchase kale?
Sample Wave 30 N=205, Wave 34 N=202, Wave 38 N=202

Horticulture Innovation Australia

colmar brunton.

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

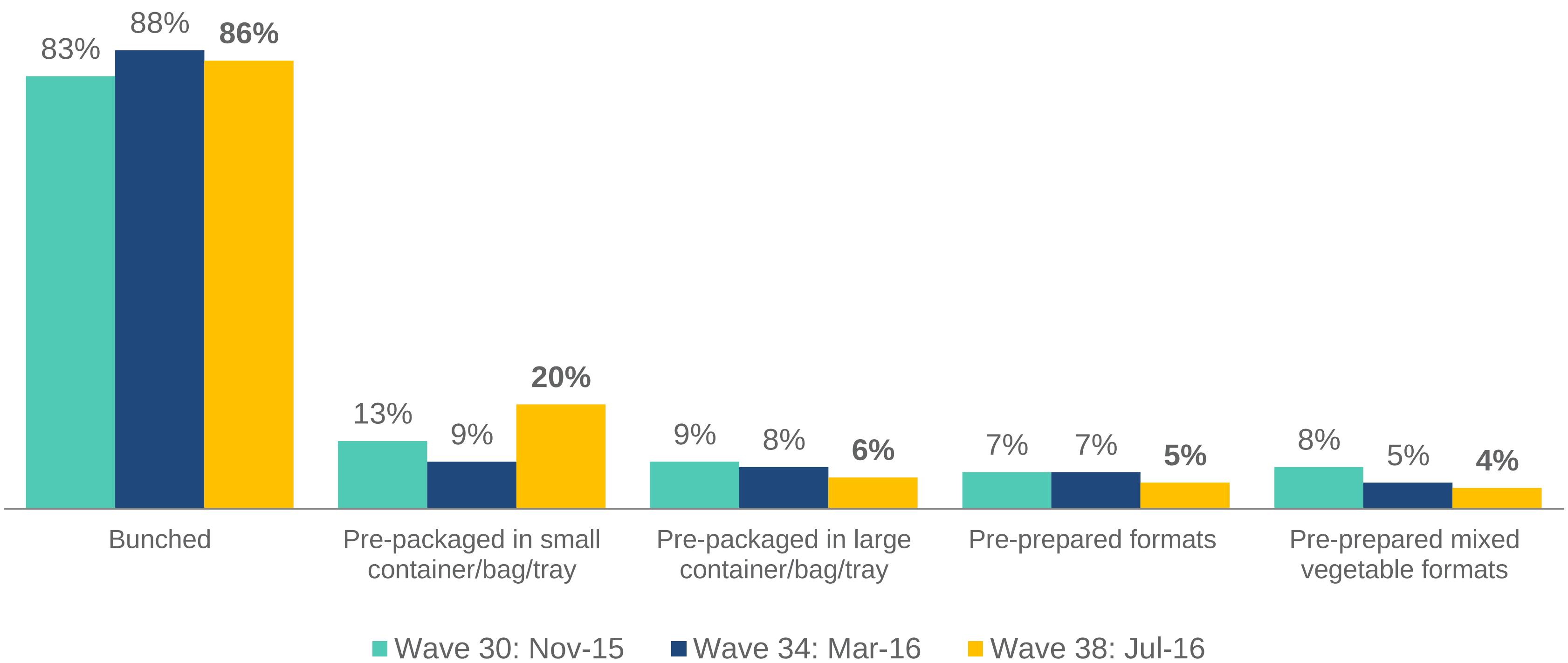
Average Spend and Price Sensitivity.

Average weight of purchase	Recalled last spend	Value for money
The average consumer typically purchases **600g** of kale, a slight decline from the previous wave.	Recalled last spend on kale is **$3.80**, returning to spend recorded in Wave 30.	Consumers perceived kale to be fair value for money **(5.9/10)**, which has continued to decrease this wave.
600g, Wave 30	$3.80, Wave 30	▲ 6.1/10, Wave 30
▲ 700g, Wave 34	▲ $4.20, Wave 34	▲ 6.0/10, Wave 34

Q3. How much kale do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 30 N=205, Wave 34 N=202, Wave 38 N=202

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

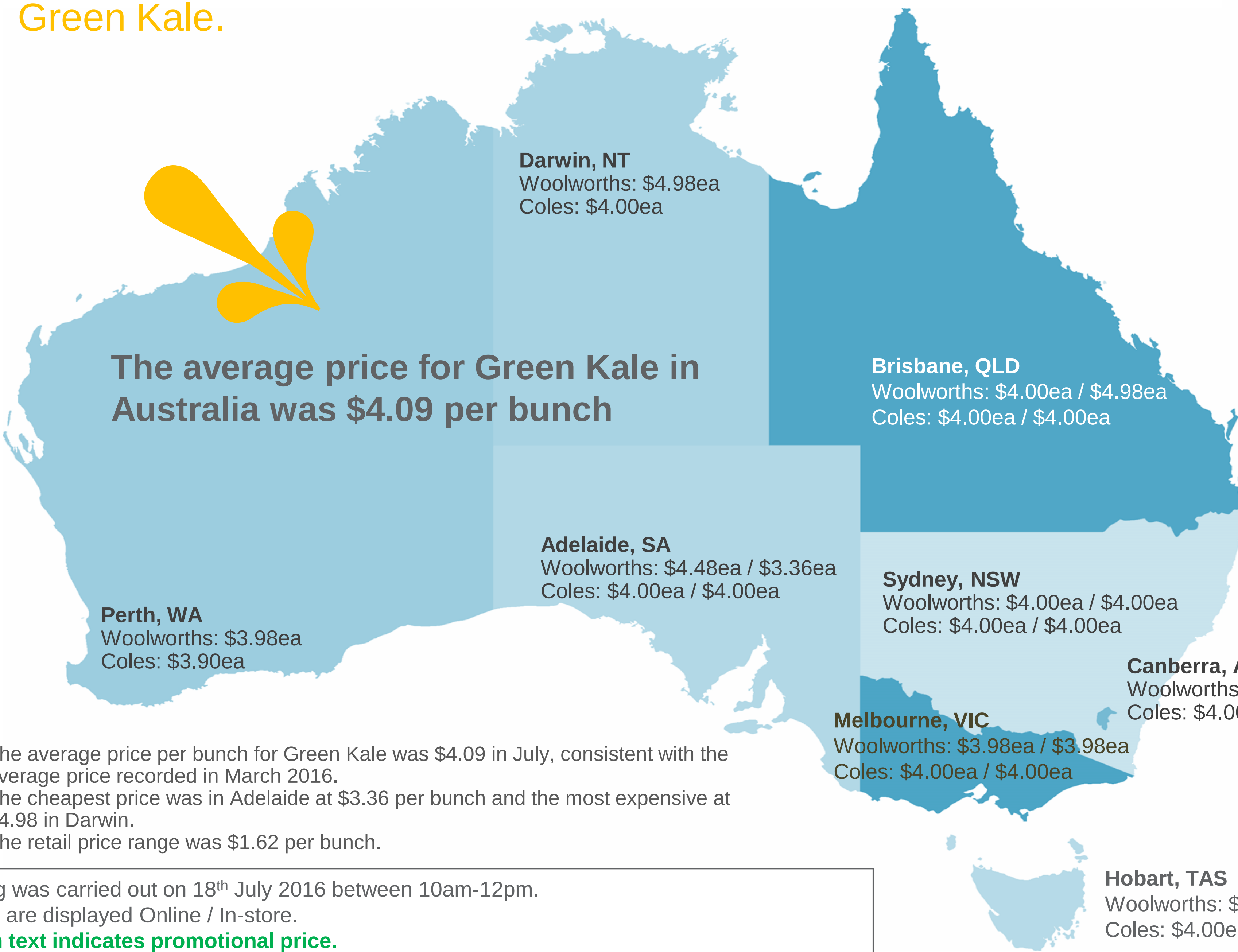
Bunched kale is the most common purchase format, consistent with previous waves. This wave saw a noticeable increase in purchase of kale in pre-packaged small bags.



Q4b. In what fresh formats do you typically purchase kale?
Sample Wave 30 N=205, Wave 34 N=202, Wave 38 N=202

Online and In-store Commodity Prices.

Green Kale.

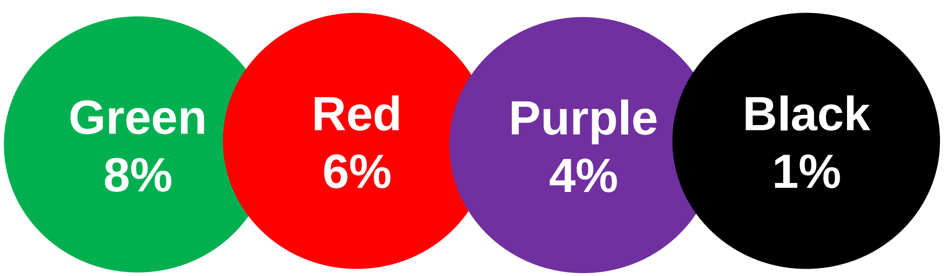


- The average price per bunch for Green Kale was $4.09 in July, consistent with the average price recorded in March 2016.
- The cheapest price was in Adelaide at $3.36 per bunch and the most expensive at $4.98 in Darwin.
- The retail price range was $1.62 per bunch.

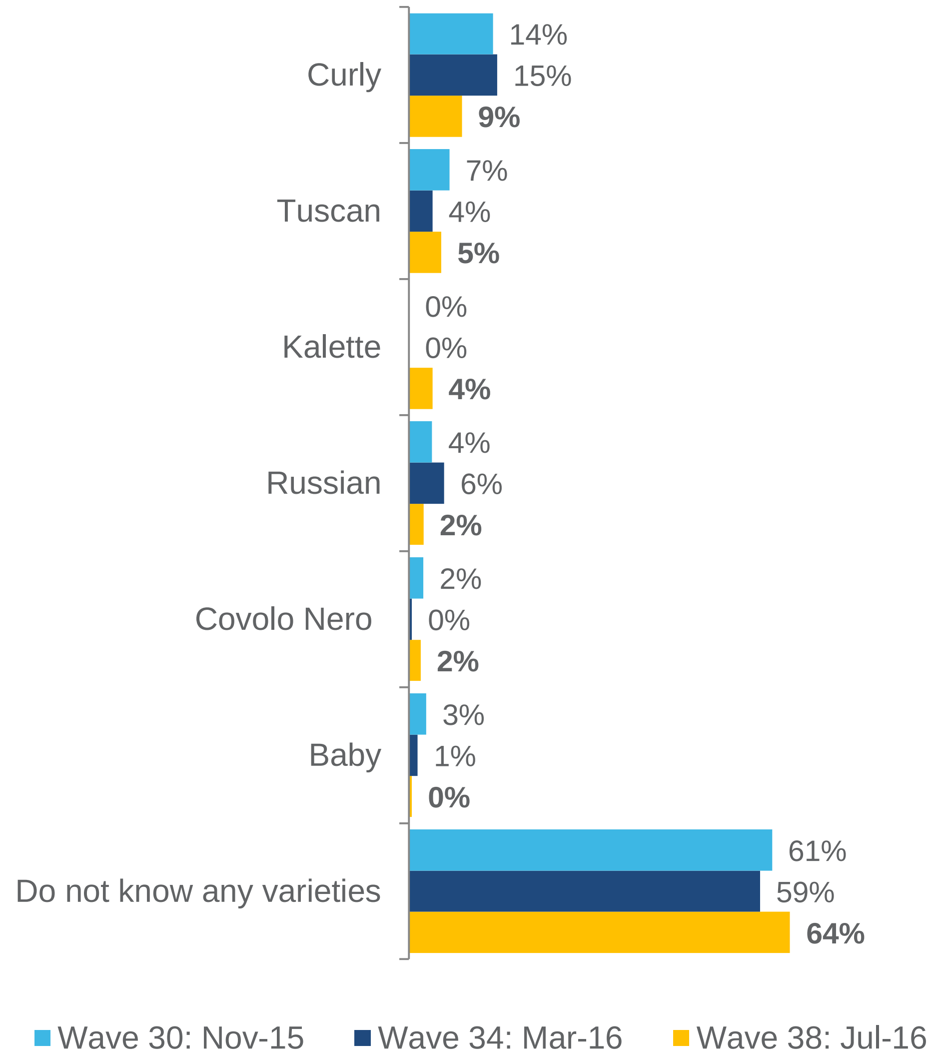
Pricing was carried out on 18th July 2016 between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates promotional price.

Awareness of types of kale has declined this wave; with almost two thirds of consumers still unable to recall a variety.

This wave sees significantly lower recall for the colour green.

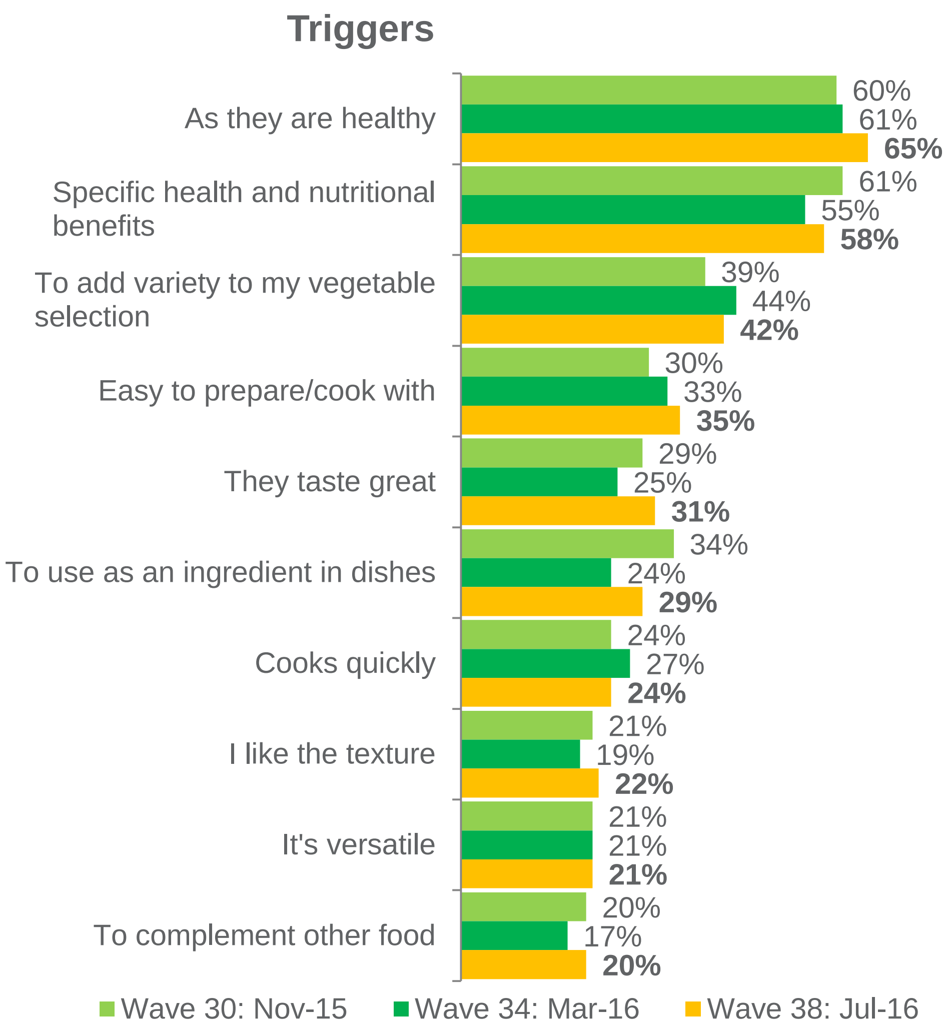


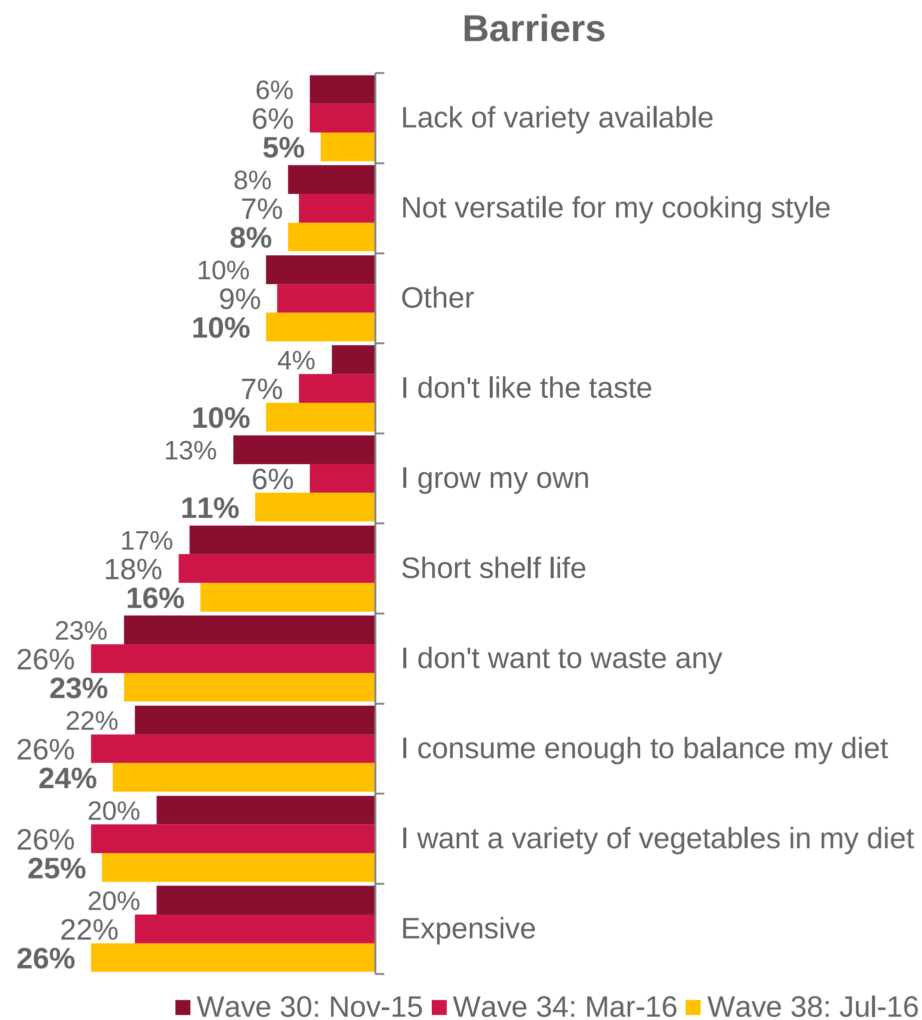
Colour recall for kale types



Q6a. What varieties of kale are you aware of? (unprompted)
Sample Wave 30 N=205, Wave 34 N=202, Wave 38 N=202

The key drivers of purchase for kale are health related due to its specific health and nutritional benefits. This wave sees a continuous increase in ease of preparation as a trigger to purchase. In contrast, price and wanting a variety of vegetables are the key barriers to purchase.





Q7. Which of the following reasons best describes why you purchase kale?
Q8. Which reason best describes why you don't buy kale more often?
Sample Wave 30 N=205, Wave 34 N=202, Wave 38 N=202

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

Meal occasions tend to occur during dinner and family meals.

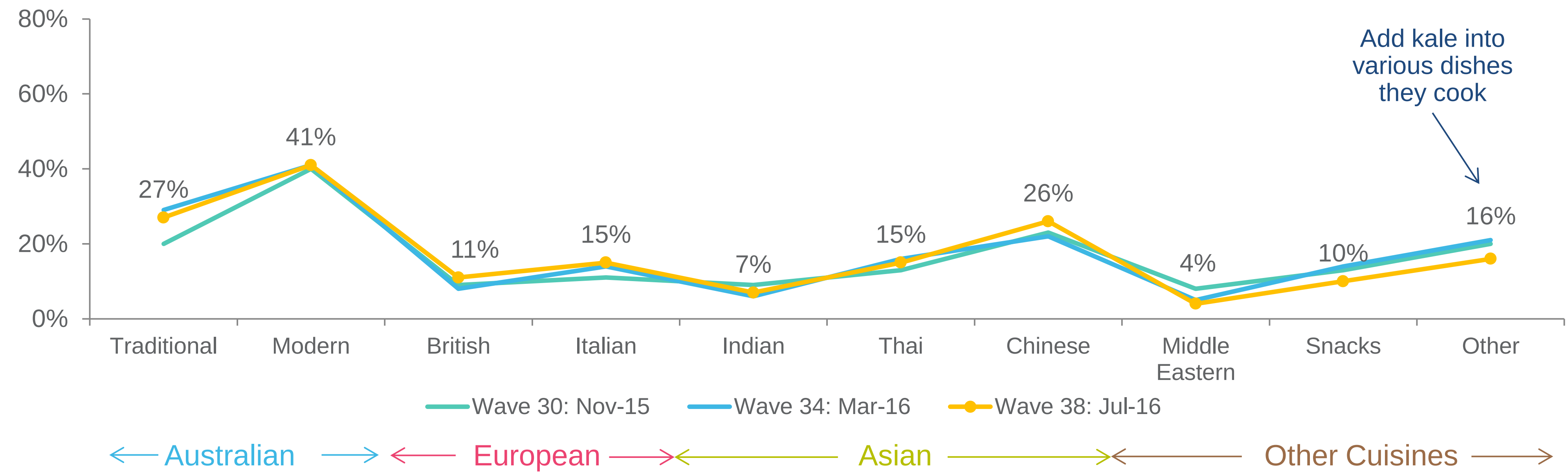
Top 5 Consumption Occasions

	Wave 34	Wave 38
Dinner	51%	**55%**
Family meals	47%	**43%**
Quick Meals	32%	**33%**
Weekday meals	33%	**30%**
Weekend meals	24%	**26%**

20%
used kale when cooking a new recipe

20%, Wave 34

Typical Cuisine Cooked



Q10. What cuisines do you cook/consume that use kale?
Q11. Which of the following occasions do you typically consume/use kale?
Sample Wave 30 N=205, Wave 34 N=202, Wave 38 N=202

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

Consumers prefer to use kale mainly with carrots, onions and potatoes. Kale is generally stir fried, steamed, or eaten raw. There was a noticeable increase of kale being cooked in soups.

Accompanying Vegetables

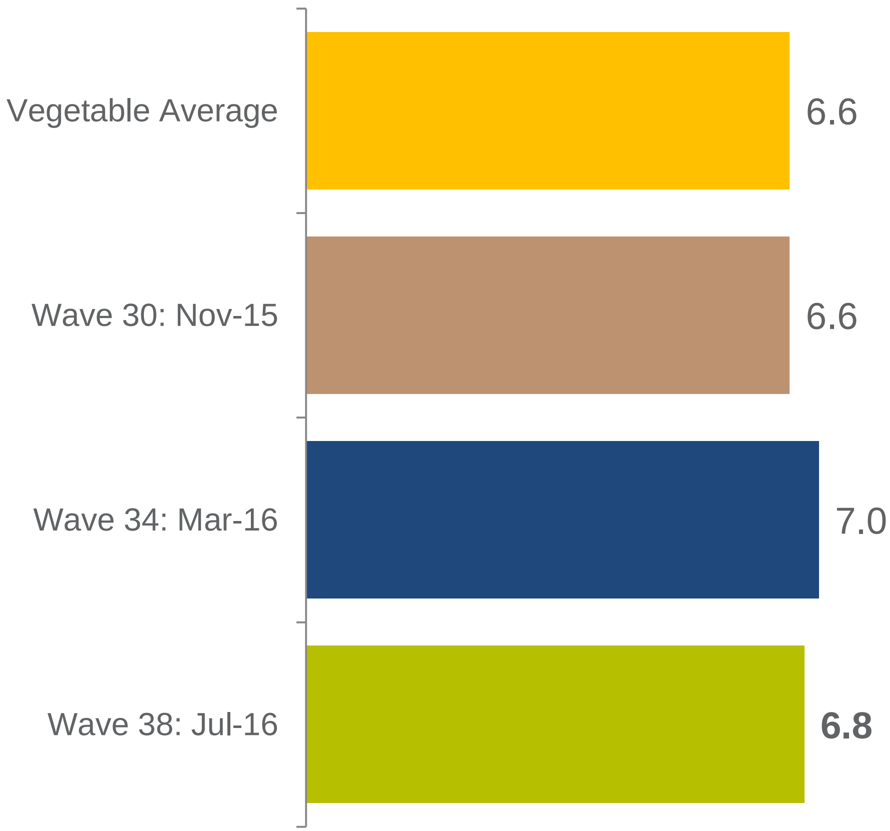
Carrot	47% ▲
Onion	35% ▲
Potato	30% ▲
Capsicum	26% ▲
Sweet Potatoes	26% ▲

Top 10 Cooking Styles

	Wave 30	Wave 34	Wave 38
Stir frying	39%	36%	**41%**
Steaming	39%	40%	**36%**
Raw	31%	36%	**29%**
Soup	19%	18%	**25%**
Sautéing	22%	16%	**19%**
Boiling	15%	16%	**17%**
Other	17%	14%	**13%**
Frying	10%	9%	**11%**
Microwave	5%	6%	**9%**
Baking	11%	10%	**9%**

Q9. How do you typically cook kale?
Q10a. And when are you serving kale which of the following do you also serve together with this?
Sample Wave 30 N=205, Wave 34 N=202, Wave 38 N=202

This wave sees a slight drop in the importance of kale provenance. Knowing that kale is grown in Australia remains highly important information for consumers.



8.1

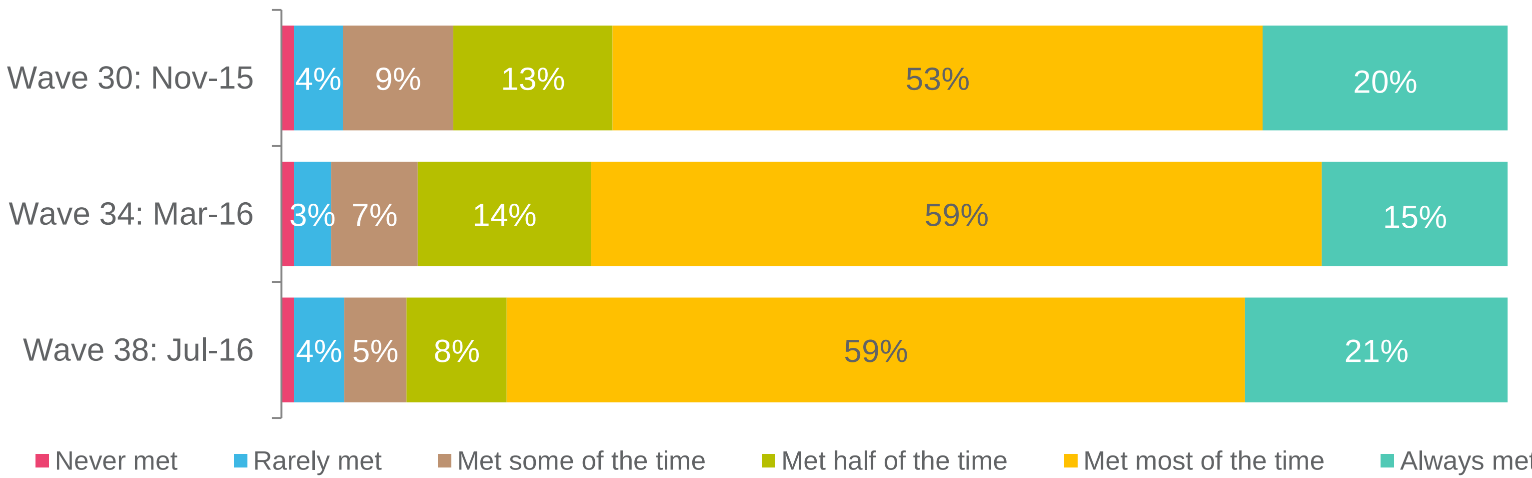
Q14. When purchasing kale, how important is Provenance to you?
Q15. And when purchasing Kale, how important is that it is grown in Australia?
Sample Wave 30 N=205, Wave 34 N=202, Wave 38 N=202

Consumers expect kale to remain fresh for approximately a week once purchased. This wave sees an increase in these expectations always being met.

Expected to stay fresh for **6.9** days

▼ 6.8 days, Wave 30
▲ 7.0 days, Wave 34

Expectations Met



Q12. How long do you expect kale to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy kale?
Sample Wave 30 N=205, Wave 34 N=202, Wave 38 N=202

Horticulture Innovation Australia

colmar brunton.

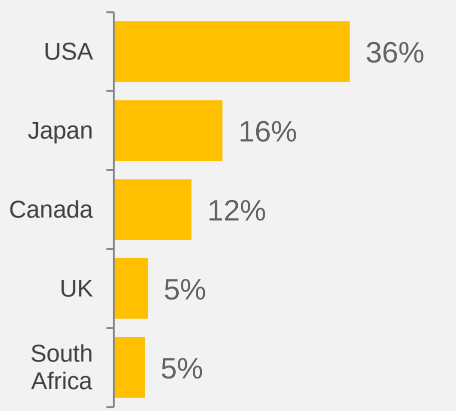
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Kale Product Launch Trends.

Kale Global Launches
April – July 2016

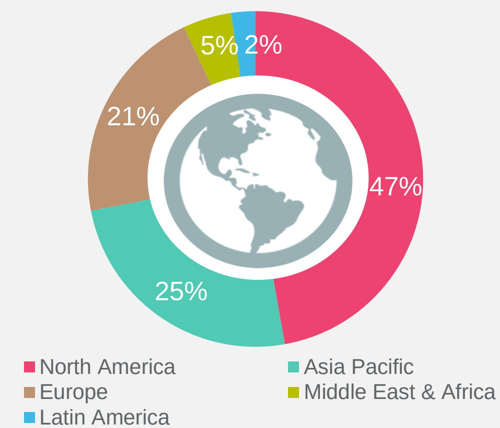
There were 214 kale products launched globally over the last three months. The majority of launches were in USA and Japan. Categories for launches were juice drinks and snacks. Key packaging for kale products were in flexible packaging and bottles.

Country

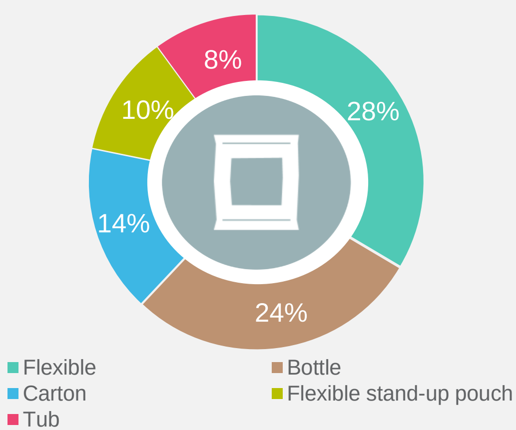


214 Global NPDs

Region



Top Pack Formats



Categories

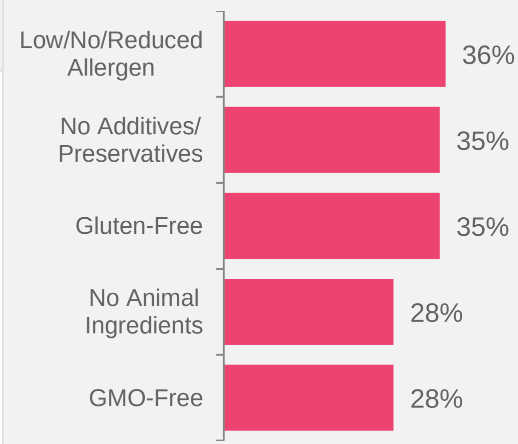
Juice Drinks 33%

Snacks 14%

Fruits & Vegetables 14%

Meals 14%

Top Claims



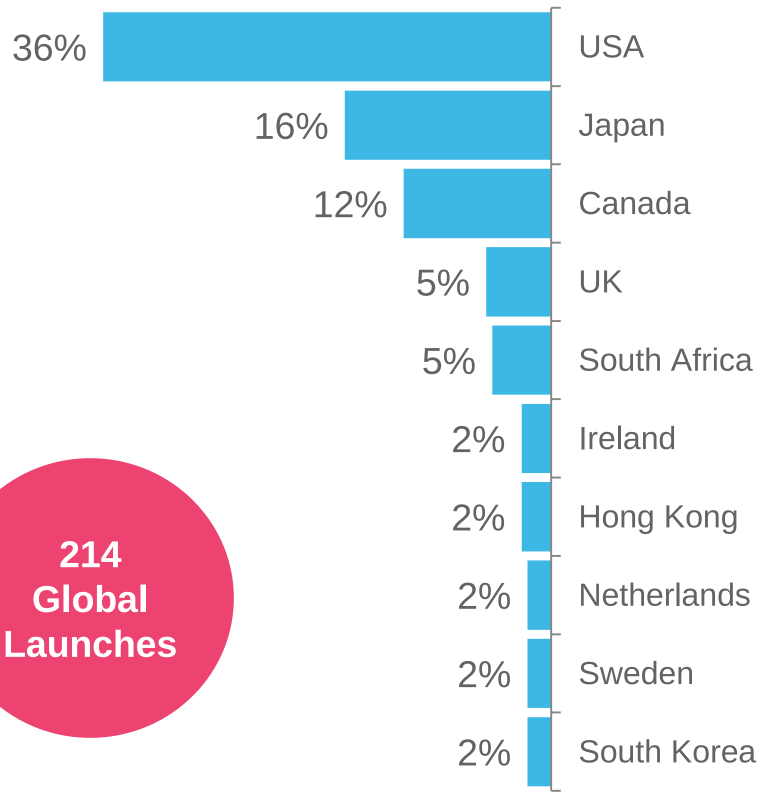
Kale Product Launches:
Last 3 Months (April – July 2016)
Summary

- There were 214 launches in the past 3 months globally that contained kale as an ingredient.
- There were 3 products launched in Australia over the past three months.
- North America (47%) and Asia Pacific (25%) were the key regions for launches.
- Flexible packaging (28%) and bottles (24%) were the most common formats used for products.
- The main categories for launches were juice drinks (33%), snacks (14%) and fruits & vegetables (14%).
- Claims used on products highlighted health; low/no/reduced allergen (36%), no additives/preservatives (35%) and gluten free (35%).
- The most innovative product launched was Cheezy Kale Popcorn in Sweden. More examples can be found in the following pages.

Source: Mintel (2016)

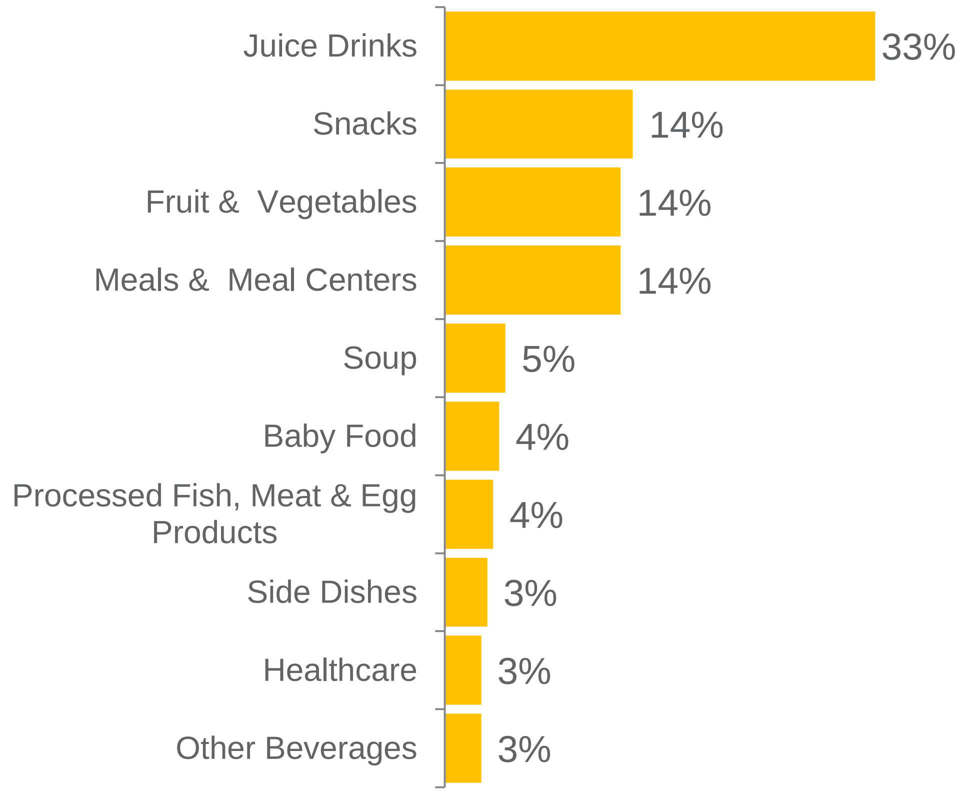
The majority of kale launches occurred in USA and Japan. The key categories for kale launches are juice drinks, snacks, and fruits & vegetables, relatively consistent with the previous wave.

Top Launch Countries



214 Global Launches

Top Launch Categories



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

Pack Formats Used

Global	Flexible	28%
	Bottle	24%
	Carton	14%
North America	Flexible	37%
	Bottle	22%
	Tub	10%
Asia Pacific	Bottle	38%
	Carton	36%
	Flexible	9%

Top Claims Used

Global	Low/No/Reduced Allergen	36%
	No Additives/Preservatives	35%
	Gluten-Free	35%
North America	Low/No/Reduced Allergen	52%
	Gluten-Free	51%
	GMO-Free	50%
Asia Pacific	Low/No/Reduced Sugar	57%
	Low/No/Reduced Sodium	49%
	No Additives/Preservatives	47%

Only regions with n >30 are displayed

Innovative Kale Launches:
L3M (April – July 2016)

Eat Real White Cheddar Flavour Quinoa & Kale Puffs (Canada)

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

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

Natasha's Lemon & Pepper Flavoured Kale Crunchies (Ireland)

Natasha's Lemon & Pepper Flavoured Kale Crunchies are now available. This product comprises air-dried Irish kale tossed with Connemara seaweed, seasoned with sunflower seeds and spices, and splashed with Atlantic sea salt, fresh lemon and black pepper. It is raw, vegan and is claimed to be packed with the best ingredients the earth has to offer. It is also free from dairy, egg and gluten, and retails in a 15g pack.

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

Kaley's Bacon Flavoured Kale Chips (Canada)

Kaley's Bacon Flavoured Kale Chips are now available. This vegetarian product is described as an air dried not deep fried snack made with a kale leaf and a dash of spice, contains all natural flavours and is a high source of fibre. It is free from trans fat, MSG, GMO and gluten and retails in a 113g pack.

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

Pressed by Kind Pineapple Banana Kale Spinach Fruit Bars (USA)

Pressed by Kind Pineapple Banana Kale Spinach Fruit Bars are now available. This kosher certified and vegan product is made with only fruit and veggies and has no sugar added, gluten, genetically engineered ingredients, dairy or preservatives. It has low glycemic index and low sodium, and is a good source of fiber and is claimed to be a quick, convenient way to add fruit to the daily routine.

Claims:
No Additives/Preservatives, High/Added Fiber, Kosher, Low/No/Reduced Sugar, Low/No/Reduced Sodium, Low/No/Reduced Glycemic, Gluten-Free, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Vegan, On-the-Go, Time/Speed, Ease of Use, No Animal Ingredients, GMO-Free

Source: Mintel (2016)

Innovative Kale Launches:
L3M (April – July 2016)

Made in Nature Organic Olive Sea Salt Kale Chips Supersnacks (USA)

Made in Nature Organic Olive Sea Salt Kale Chips Supersnacks are now available. The product is made with kale, cashews, kalamata olives and sea salt. It is described as real food with real flavor, and is said to be healthy, tasty, raw and crunchy. This USDA organic certified product is suitable for vegans and retails in a 2.2-oz. pack bearing Facebook, Twitter, Pinterest and Instagram logos.

Claims:
Organic, Vegan, No Animal Ingredients, Social Media

Heavenly Organic Superfoods Spinach, Apple & Kale Yummy Wafer Wisps (Spain)

Heavenly Organic Superfoods Spinach, Apple & Kale 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 with nothing added and are free from added sugar, salt, artificial colours and flavours. This product retails in an 84g pack containing six 14g units and featuring the EU Green Leaf, Facebook and Twitter logos. Each unit contains three sachets.

Claims:
No Additives/Preservatives, Low/No/Reduced Sugar, Organic, Low/No/Reduced Sodium, Babies & Toddlers (0-4), Children (5-12), Bone Health, Social Media

Organic Girl Salad Love Kale Parmesan Vinaigrette (USA)

Organic Girl Salad Love Kale Parmesan Dressing is said to put greens on your greens with the power of kale, herbs and parmesan. The USDA organic certified product comprises mint, basil and chives, and is free of GMOs, corn syrup, preservatives and gluten. It is suitable vegetarians and retails in a 8 fl-oz. pack.

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

Bear Pond Farm 3 Greens Pesto (USA)

Bear Pond Farm 3 Greens Pesto is packed with super greens and superfoods and comprises arugula, kale, olives, seeds, leeks and basil. The product is free of dairy and can be frozen. It is suitable for a vegan diets and retails in a reusable and microwavable 6.5-oz. pack.

Claims:
Microwaveable, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Package, Vegan, No Animal Ingredients

Source: Mintel (2016)

Innovative Kale Launches:
L3M (April – July 2016)

Rhythm Superfoods Roasted Garlic & Onion Roasted Kale (USA)

Rhythm Superfoods Roasted Garlic & Onion Roasted Kale is made with triple washed organic Lacinato kale, roasted in a delicate oil and seasoned to perfection. It is high in vitamins A, K, and C, and prepared to have a homemade taste and delicate crunch. This USDA organic certified vegan product is free of gluten and retails in a 0.75-oz. pack featuring the Twitter, Facebook and Instagram logos.

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

Mediterra Savory Bar with Kale & Pumpkin Seeds (USA)

Mediterra Savory Bar with Kale & Pumpkin Seeds is described as a Mediterranean nutrition bar that is all natural. This kosher certified on-the-go product is a gourmet blend of pea crisps, amaranth, rosemary, and a touch of extra virgin olive oil and is free from GMO and gluten. It contains 6g of protein and 5g of fiber and retails in a 1.23-oz. pack.

Claims:
All Natural Product, Kosher, Gluten-Free, Low/No/Reduced Allergen, On-the-Go, GMO-Free

Woolworths Food Pumpkin & Creamy Kale Bake (South Africa)

Woolworths Food Pumpkin & Creamy Kale Bake comprises of pumpkin and creamy kale bake in a creamy kale sauce with red onion petal sprinkle. The vegetarian product retails in a 700g pack that provides four servings.

Claims:
Vegetarian

Planet Organic Cheezy Kale Popcorn (Sweden)

Planet Organic Ekologiska Popcorn (Cheezy Kale Popcorn) is said to be hand-popped in artisan kettles and made with coconut oil. The popcorn is vegan, gluten free and soy free, and flavoured using real organic ingredients. This crunchy product retails in a 20g pack featuring the EU Green Leaf, Organic Soil Association, Facebook and Instagram logos.

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

Source: Mintel (2016)

Australian Kale Launches:
L3M (April – July 2016)

V8 Power Blend Healthy Greens Veggie and Fruit Juice

V8 Power Blend Healthy Greens Veggie and Fruit Juice is now available. The product is made with apple, carrot, cucumber, spinach, celery and kale, and contains two serves of veggies per 250ml serving. It is free from artificial colourings and flavouring, added preservative and added sugar, and is said to be a good source of powerful antioxidant vitamin C. This product retails in a 1.25L recyclable bottle.

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

Mary's Gone Crackers Thins Kale Snack Crackers

Mary's Gone Crackers Thins Kale Snack Crackers are described as light and tasty crackers. They are made using an array of gluten free flours made from sprouted buckwheat, sprouted black beans, amaranth, mesquite and sorghum, with added chia seeds, quinoa flakes, herbs and spices for flavour. The USDA organic certified crackers are suitable for vegans, are kosher certified and free from gluten, GMOs, trans fat, peanuts and soya.

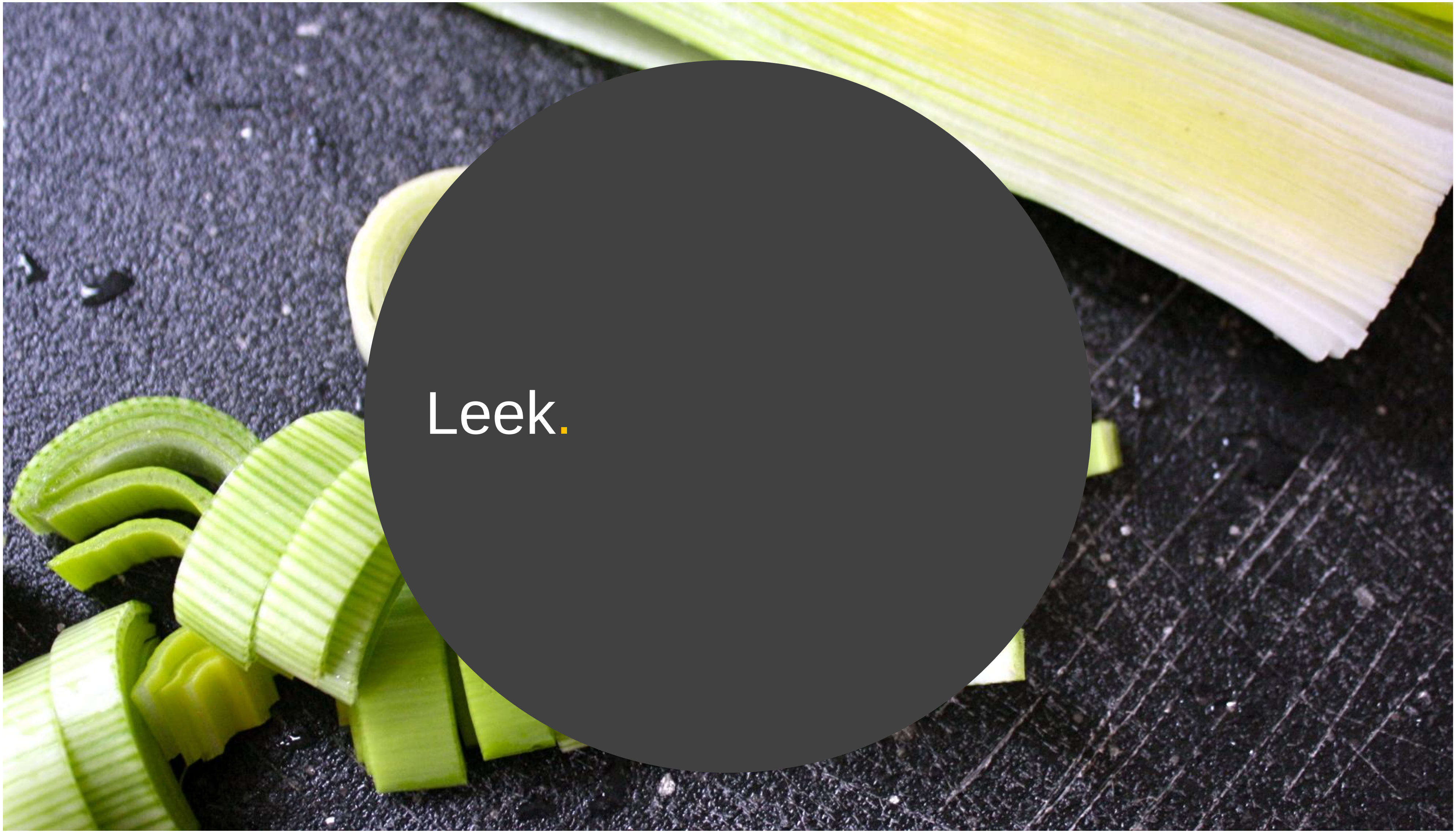
Claims:
Kosher, Organic, Gluten-Free, Low/No/Reduced Transfat, Wholegrain, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Package, Vegan, No Animal Ingredients, GMO-Free, Social Media

Blackmores Iron Support Advanced Bio Iron Tablets

Blackmores Iron Support Advanced Bio Iron Tablets are described as gentle iron for dietary deficiency. This one-a-day high potency dietary supplement contains a low nausea and low constipation form of iron that is generally well tolerated and gentle on the digestive system. It supports healthy energy levels, is suitable for vegetarians and vegans, and includes kale.

Claims:
No Additives/Preservatives, Vegetarian, Gluten-Free, Digestive (Functional), Low/No/Reduced Allergen, Vegan, No Animal Ingredients, Energy (Functional)

Source: Mintel (2016)


Leek.

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

Purchase is typically through mainstream retailers, whilst there has been a decreasing trend in purchase from specialist retailers and independent supermarkets.

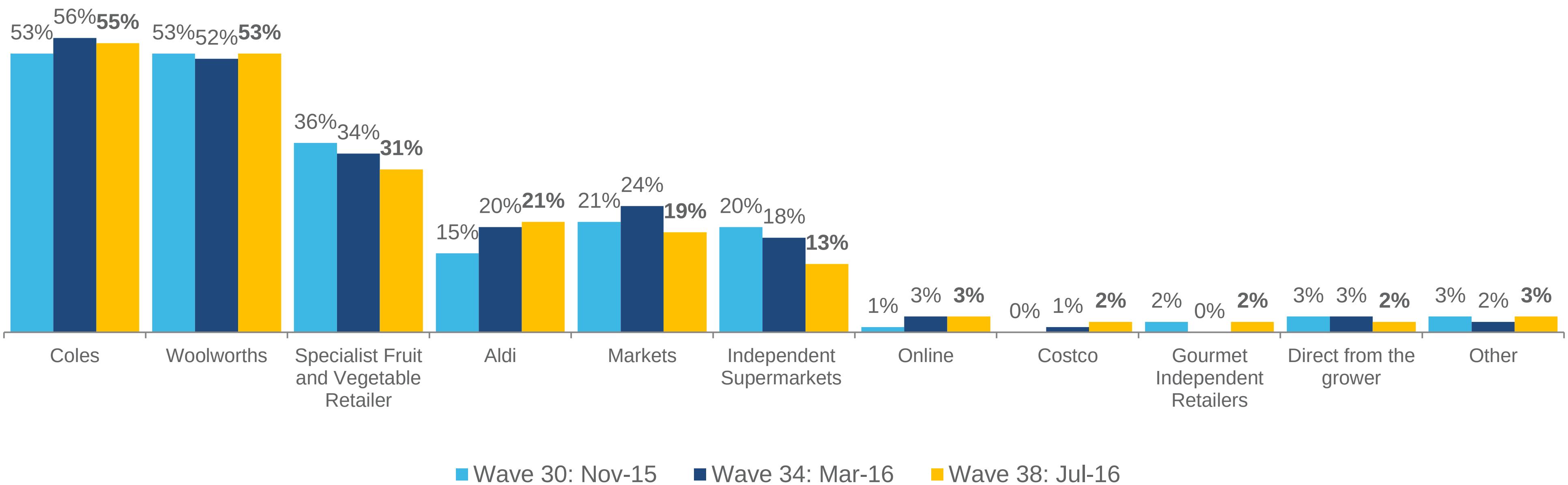
Average Purchase **2.3** times per month

▲ 2.4 times, Wave 30
▼ 2.2 times, Wave 34

Average Consumption **3.8** times per month

▲ 4.4 times, Wave 30
▲ 4.2 times, Wave 34

Purchase Channels



Q1. On average, how often do you purchase leeks?
Q2. On average, how often do you consume leeks?
Q5. From which of the following channels do you typically purchase leeks?
Sample Wave 30 N=204, Wave 34 N=202, Wave 38 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

The average consumer typically purchases **700g** of leeks, remaining consistent with last wave.

▲ 800g, Wave 30
— 700g, Wave 34

Recalled last spend

Recalled last spend on leeks was **$3.40**, higher than the previous wave.

▲ $3.50, Wave 30
▼ $3.10, Wave 34

Value for money

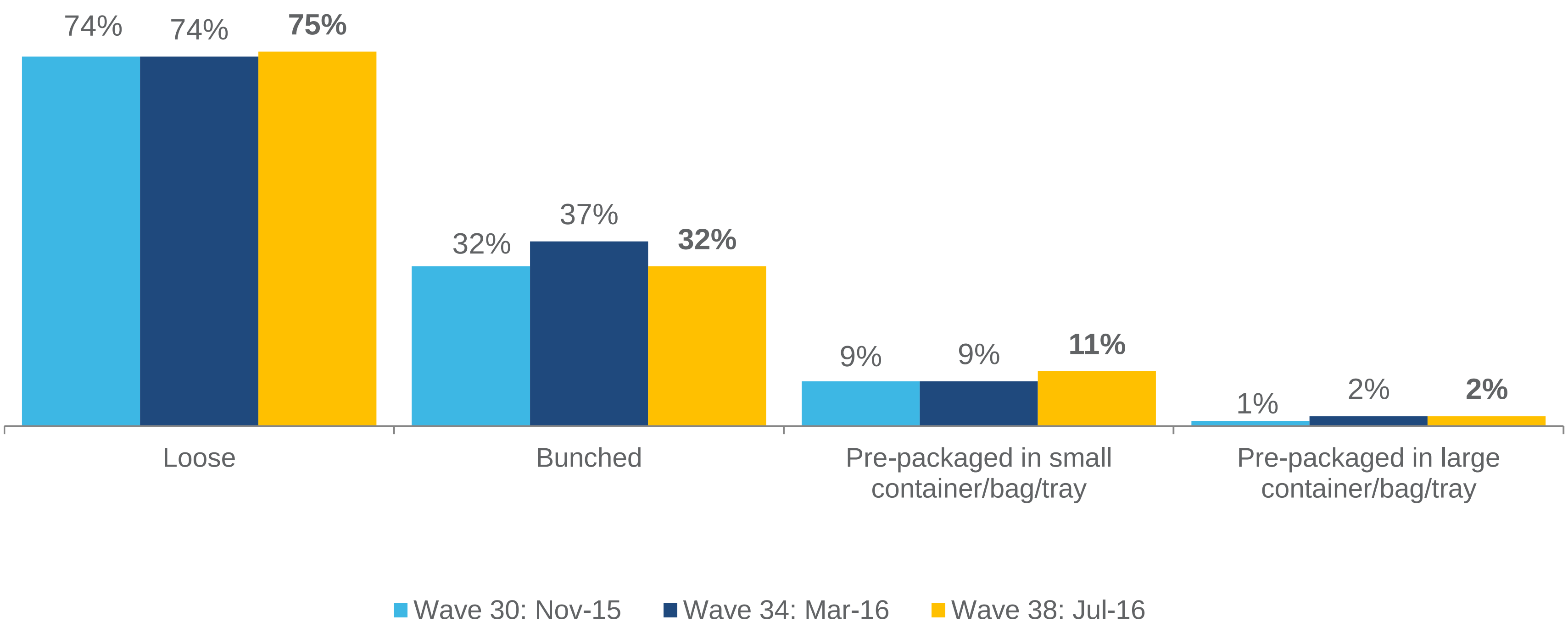
Consumers' perceived value for money is fair for leeks **(6.2/10)**, slowly increasing over the last three waves.

▼ 6.0/10, Wave 30
▼ 6.1/10, Wave 34

Q3. How much leek do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 30 N=204, Wave 34 N=202, Wave 38 N=200

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

Individual leeks are the most common purchase format, consistent with past waves. Bunched leeks are also typically purchased.



Q4b. In what fresh formats do you typically purchase leeks?
Sample Wave 30 N=204, Wave 34 N=202, Wave 38 N=200

Online and In-store Commodity Prices.

Leek.

The average price for Leeks in Australia was $2.21 each

Darwin, NT
Woolworths: $3.00ea
Coles: $2.50ea

Brisbane, QLD
Woolworths: N/A / $2.00ea
Coles: $2.00ea / $2.00ea

Adelaide, SA
Woolworths: $2.50ea / $2.50ea
Coles: $2.50ea / $2.50ea

Sydney, NSW
Woolworths: $2.00ea / $2.00ea
Coles: $2.00ea / $2.00ea

Perth, WA
Woolworths: $2.48ea
Coles: **$1.50ea**

Canberra, ACT
Woolworths: $2.20ea
Coles: $2.00ea

Melbourne, VIC
Woolworths: $2.20ea / $2.20ea
Coles: $2.20ea / $2.20ea

Hobart, TAS
Woolworths: $2.20ea
Coles: $2.20ea

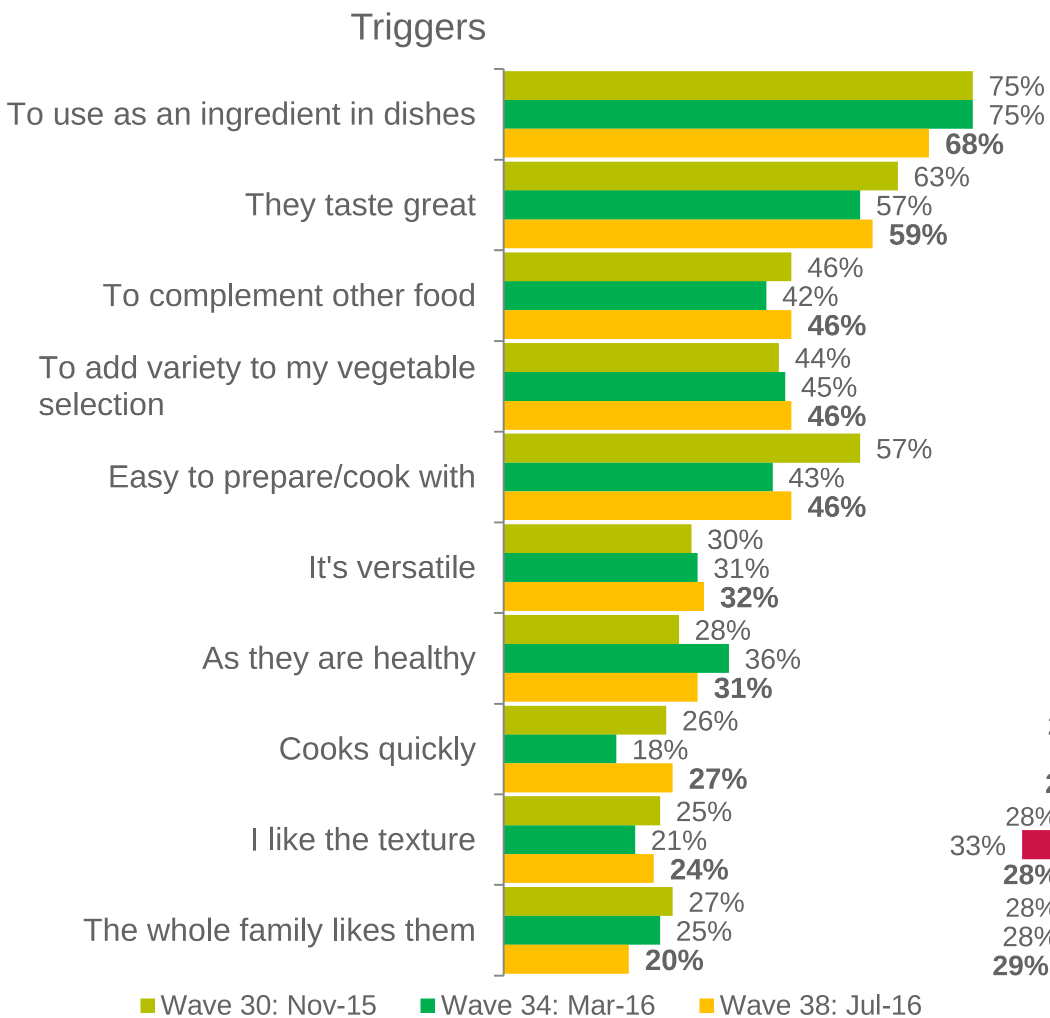
- The average price for an individual leek was $2.21 in July, relatively consistent across waves.
- The cheapest price was in Perth at $1.50 and the most expensive at $3.00 in Darwin.
- The retail price range was $1.50.

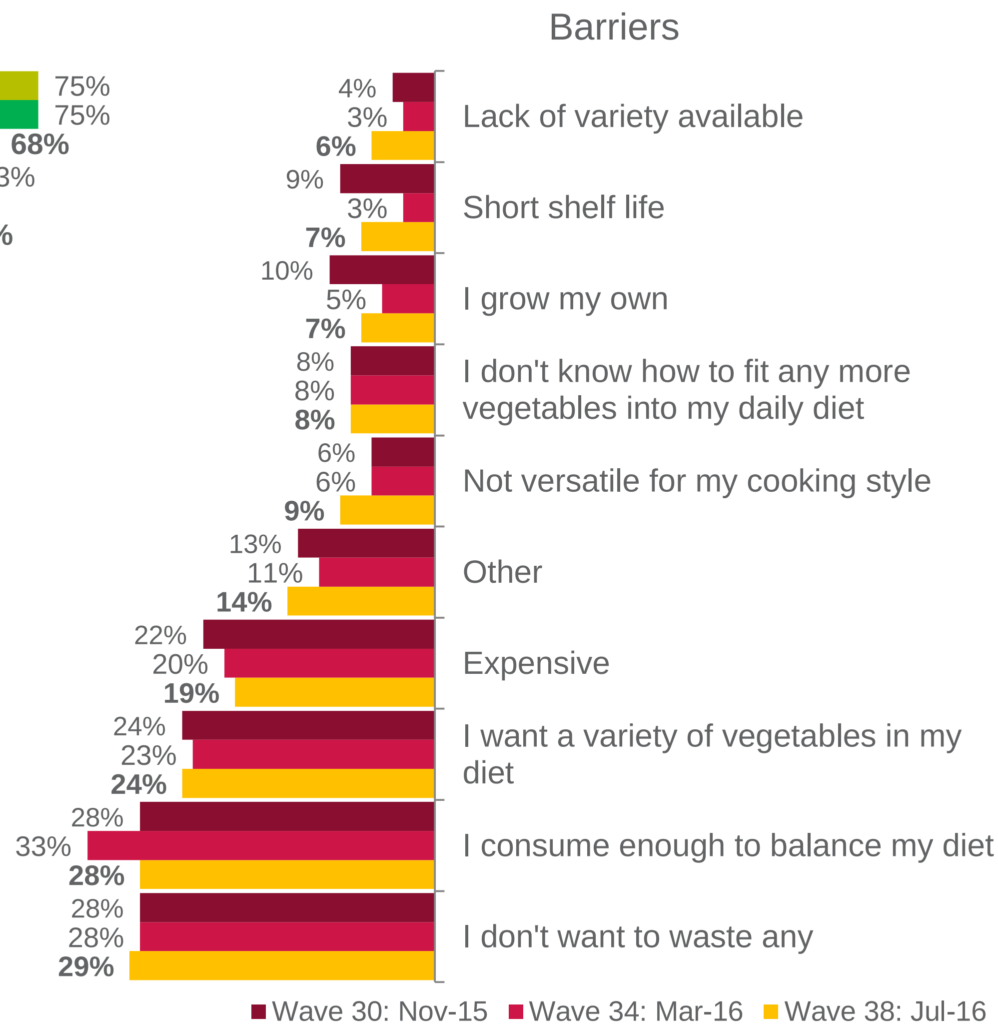
Pricing was carried out on 18th July 2016 between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates promotional price.

Awareness of leek varieties is low, with 89% of consumers unable to recall a type.

Q6a. What varieties of leek are you aware of? (unprompted)
Sample Wave 30 N=204, Wave 34 N=202, Wave 38 N=200

Using leeks as an ingredient in dishes, taste and complementing other food are the key drivers of purchase. In contrast, barriers to purchase are not wanting to waste any and already consuming enough to balance their diet.





Q7. Which of the following reasons best describes why you purchase leeks?
Q8. Which reason best describes why you don't buy leeks more often?
Sample Wave 30 N=204, Wave 34 N=202, Wave 38 N=200

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

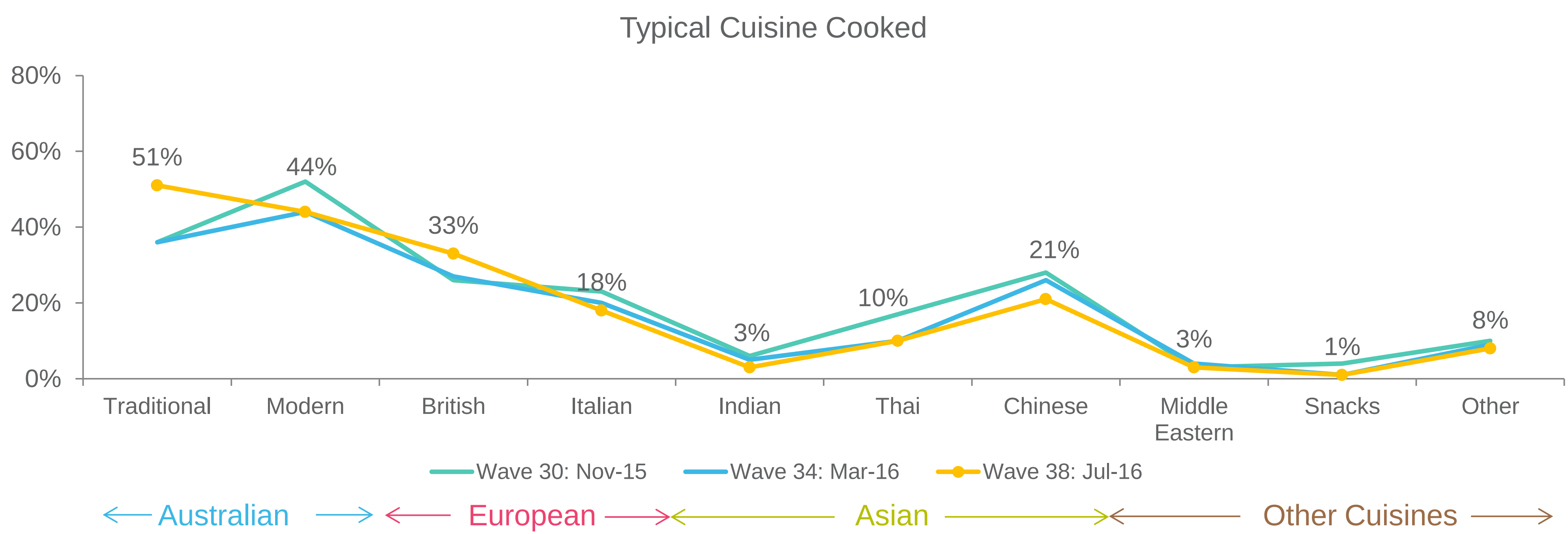
Meal occasions tend to occur during dinner. One quarter of consumers used leeks when cooking a new recipe.

Top 5 Consumption Occasions

	Wave 34	Wave 38
Dinner	69%	**64%**
Family meals	56%	**54%**
Weekday meals	42%	**39%**
Weekend meals	34%	**31%**
New recipes	24%	**25%**

25% used leeks when cooking a new recipe

▼ 24%, Wave 34



Q10. What cuisines do you cook/consume that use leeks?
Q11. Which of the following occasions do you typically consume/use leeks?
Sample Wave 30 N=204, Wave 34 N=202, Wave 38 N=200

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

Consumers prefer to serve leeks with potatoes and carrots, consistent with past waves. Leeks are generally cooked in soups and stir fries. There has been a strong upwards trend in leeks being slow cooked over the last three waves.

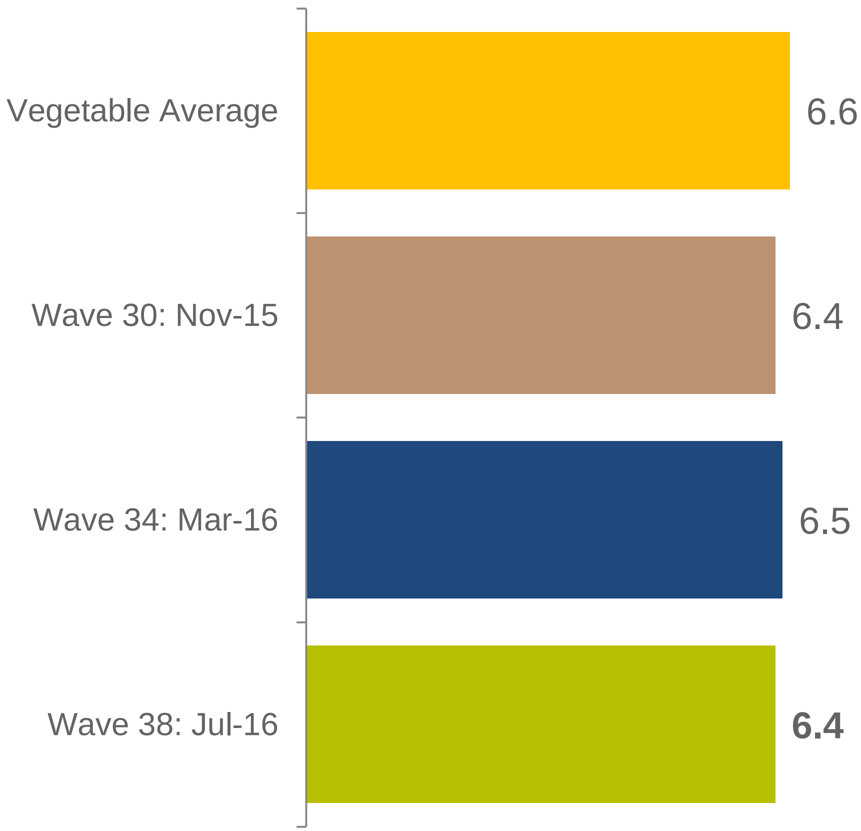
Accompanying Vegetables

Potato	62%
Carrot	50%
Onion	31%
Celery	24%
Sweet Potato	24%

Top 10 Cooking Styles			
	Wave 30	Wave 34	Wave 38
Soup	55%	59%	**74%**
Stir frying	45%	44%	**41%**
Slow Cooking	23%	30%	**35%**
Sautéing	39%	37%	**31%**
Frying	31%	26%	**21%**
Steaming	12%	18%	**16%**
Boiling	11%	13%	**15%**
Roasting	15%	13%	**11%**
Baking	15%	12%	**11%**
Microwave	6%	1%	**4%**

Q9. How do you typically cook leeks?
Q10a. And when are you serving leeks which of the following do you also serve together with this?
Sample Wave 30 N=204, Wave 34 N=202, Wave 38 N=200

The importance of the provenance of leeks has remained relatively consistent over the last three waves, now sitting just below the Vegetable Average.



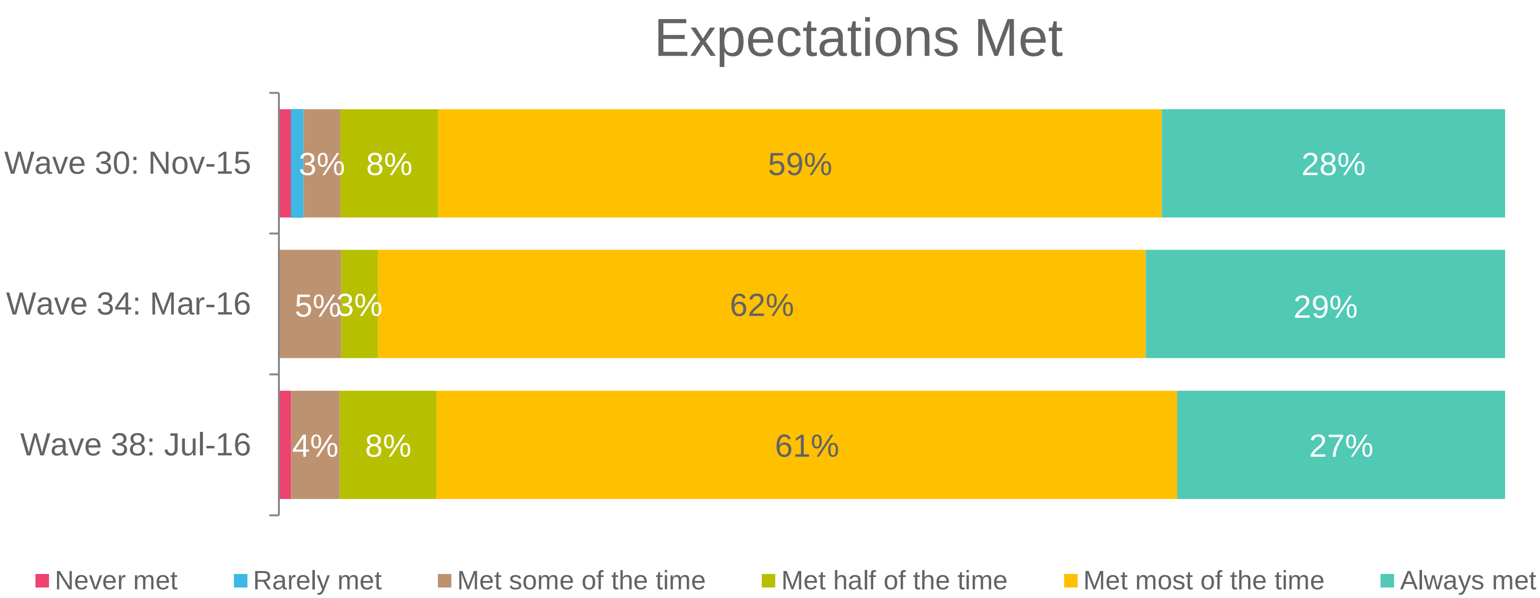
8.1

Q14. When purchasing leeks, how important is Provenance to you?
Q15. And when purchasing Leeks, how important is that it is grown in Australia?
Sample Wave 30 N=204, Wave 34 N=202, Wave 38 N=200

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

Expected to stay fresh for **9.2** days

▼ 8.6 days, Wave 30
▼ 8.7 days, Wave 34



Q12. How long do you expect leeks to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy leeks?
Sample Wave 30 N=204, Wave 34 N=202, Wave 38 N=200

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

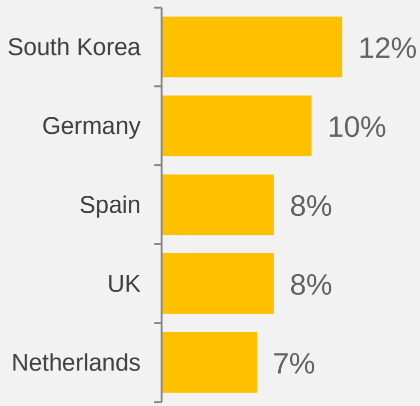
Leek Product Launch Trends.

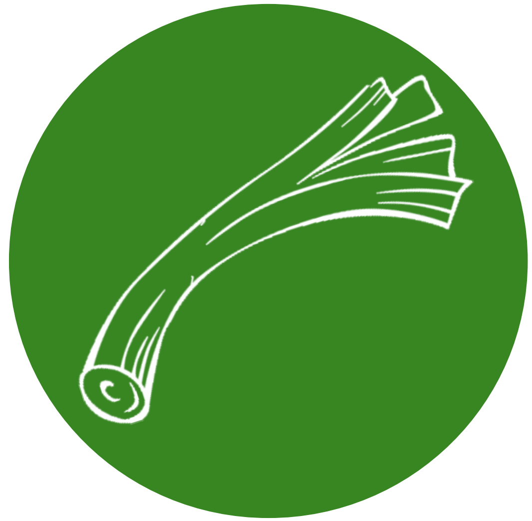
Leek Global Launches

April – July 2016

There were 428 leek products launched globally over the last three months. The majority of launches were in South Korea and Germany. Categories for launches were meals and soups.

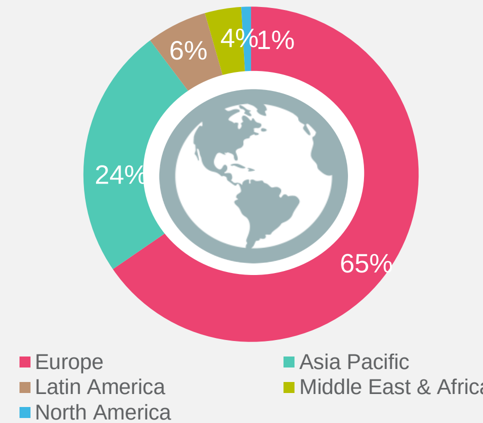
Country



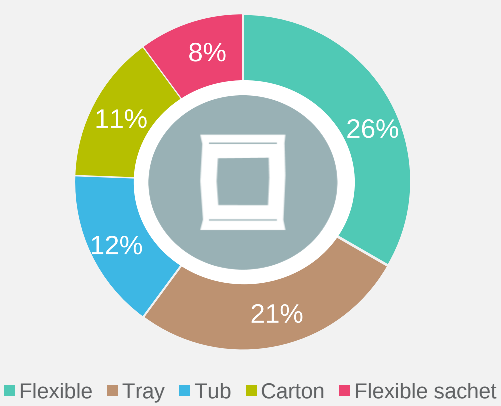


428 Global NPDs

Region



Top Pack Formats



Categories

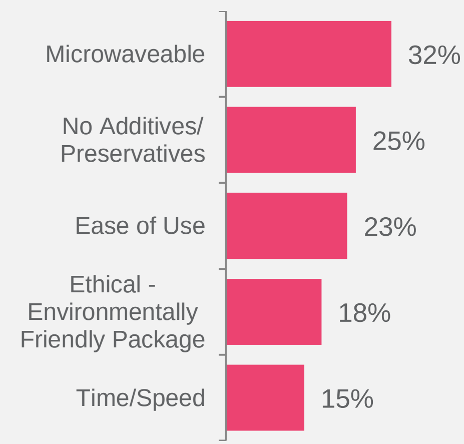
Meals 35%

Soup 20%

Processed Products 16%

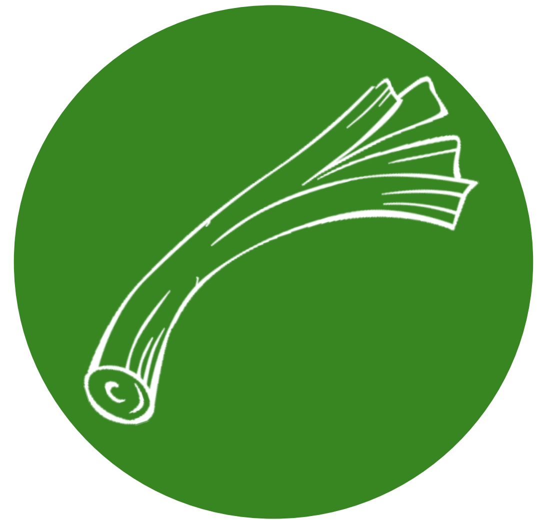
Sauces & Seasonings 11%

Top Claims



Leek Product Launches:
Last 3 Months (April – July 2016)
Summary

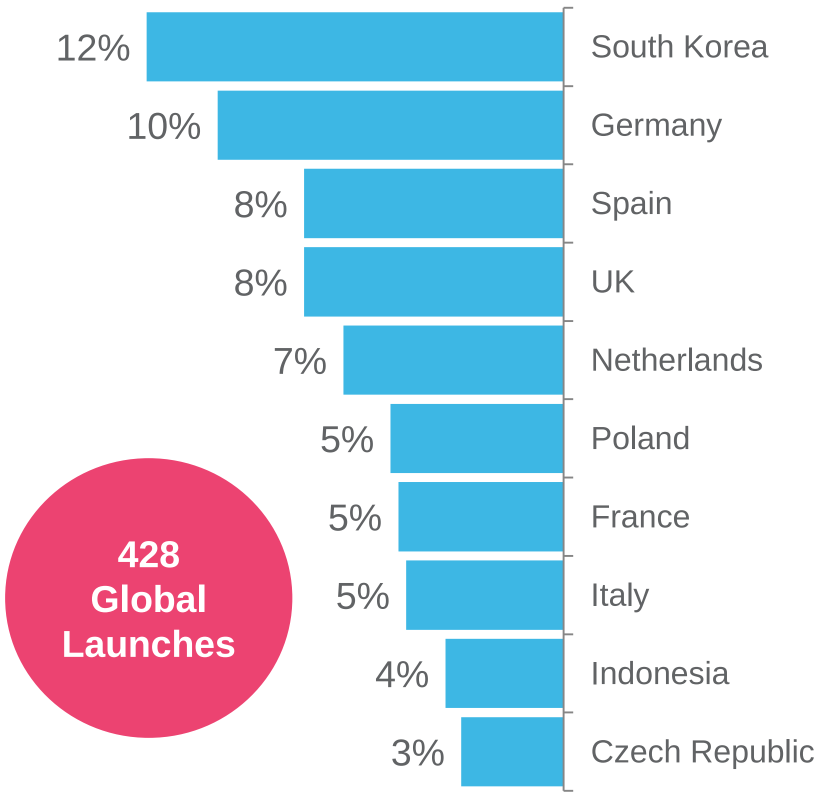
- There were 428 launches in the past 3 months globally that contained leeks as an ingredient.
- There were three products launched in Australia over the past three months.
- Europe (65%) was the key region for launches.
- Flexible packaging (26%), and trays (21%) were the most common format used for products.
- The main categories for launches were meals (35%), soups (20%), and processed products (16%).
- Claims used on products included microwaveable (32%), no additives/preservatives (25%) and ease of use (23%).
- The most innovative product launched was Potato Leek Crackers from Germany. Other examples can be found in the following pages.



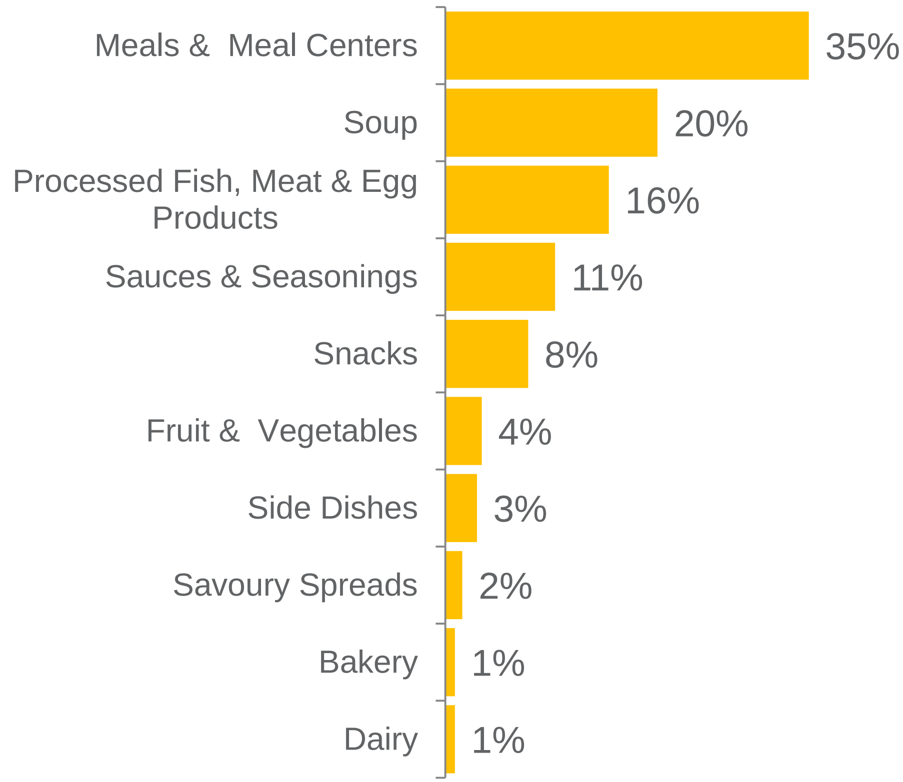
Source: Mintel (2016)

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

Top Launch Countries



Top Launch Categories



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

Pack Formats Used

Global	Flexible	26%
	Tray	21%
	Tub	12%
Europe	Tray	24%
	Flexible	22%
	Carton	14%
Asia Pacific	Flexible	40%
	Flexible stand-up pouch	16%
	Tray	14%

Top Claims Used

Global	Microwaveable	32%
	No Additives/Preservatives	25%
	Ease of Use	23%
Europe	Microwaveable	34%
	No Additives/Preservatives	24%
	Ethical - Environmentally Friendly Package	23%
Asia Pacific	Time/Speed	29%
	No Additives/Preservatives	28%
	Ease of Use	24%

Only regions with n >30 are displayed

Innovative Leek Launches:
L3M (April – July 2016)

Duc De Coeur Cheesy Leek Pie (Czech Republic)

Duc De Coeur Slaný Kolác s Pórkovou Náplní (Cheesy Leek Pie) is a puff pastry pie with crème fraîche and Emmental cheese filling. This product is retailed in a 400g pack that serves two.

Claims:
N/A

Mama Cuchara Leek Cream Soup (Spain)

Mama Cuchara Crema de Puerros (Leek Cream Soup) is made to an original recipe and is said to be ready to eat. The gluten-free, fresh and homemade product is suitable for vegetarians and microwave cooking, and retails in a 250ml pack.

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

Ametller Origen Thai Cream Soup (Spain)

Ametller Origen Crema Thai (Thai Cream Soup) is now available. The gluten-free product retails in a 300ml pack.

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

PnP...For You Macaroni & Cheese (South Africa)

PnP...For You Macaroni and Cheese comprises macaroni pasta and creamy cheese sauce topped with cheddar cheese. This product is suitable for home freezing, and can be heated in the microwave. The heat-and-eat quick meal retails in a 300g partly recycled pack.

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

Source: Mintel (2016)

Innovative Leek Launches:
L3M (April – July 2016)

AH Crosta Croccante Pizza Proscuitto (Netherlands)

AH Crosta Croccante Pizza Proscuitto has been relaunched under a new brand name, previously known as AH, and is reformulated with a new formulation with less than 25% salt. It is made according to the Italian recipe for extra light crust, is topped with smoked bacon, Grana Padano, Capicola, and rucola. It is prepared in a wood oven that is made from beechwood, and retails in a 445g pack.

Claims:
Low/No/Reduced Sodium

Jumbo Fresh Chicken, Meat, & Vegetable Filled Ravioli with a Fillet-Style Sauce (Argentina)

Jumbo Fresh Ravioles de Pollo, Carne, y Verdura con Salsa Fileto (Chicken, Meat, & Vegetable Filled Ravioli with a Fillet-Style Sauce) is now available. This meal is ready to heat in the microwave, comprises chicken, meat, and vegetable ravioli in a tomato-based sauce, and can be cooked in three minutes. This product retails in a 470g pack.

Claims:
Microwaveable, Ease of Use

Kashi Sweet Potato Quinoa Bowl (USA)

Kashi Sweet Potato Quinoa Bowl is described as a South American inspired savory tomato and tamari sauce with a blend of sweet potatoes, black beans, and kale atop a bed of red quinoa and brown rice. The microwavable product is free from GMO and contains 9g protein and 7g fiber. It is suitable for vegans and retails in a 10-oz. recycled and recyclable pack.

Claims:
Microwaveable, Ethical - Environmentally Friendly Package, Vegan, No Animal Ingredients, GMO-Free

Chef's Basket Red Sauce Pasta Dinner Kit for 2 (India)

Chef's Basket Red Sauce Pasta Dinner Kit for 2 is a hot artisan kit that contains soup, pasta, sauce and oregano and chilli flakes for an instant 15 minutes meal for two. It is free from artificial colours, flavours and preservatives, and is easy to prepare. The vegetarian, 100% natural product retails in a 544g pack featuring a Facebook logo and a QR code.

Claims:
No Additives/Preservatives, All Natural Product, Vegetarian, Time/Speed, Ease of Use, Social Media

Source: Mintel (2016)

Innovative Leek Launches:
L3M (April – July 2016)

Bio-Verde Couscous Salad with Lentils & Leek (Germany)

Bio-Verde Couscous-Salat mit Linsen und Lauch (Couscous Salad with Lentils & Leek) has been repackaged with a new design. This vegan salad is made according to an oriental original recipe, and is recommended to consume as a starter, side dish or snack. The product retails in a 125g pack featuring the EU Green Leaf logo and a QR code.

Claims:
Organic, Vegan, No Animal Ingredients

Sajo Daerim Sun Hot Spicy Pork and Leek Barbecue (South Korea)

Sajo Daerim Sun Hot Spicy Pork and Leek Barbecue is seasoned and fermented over 12 hours to make the texture tender. This easy to cook premium Korean food can be prepared in a frying pan and is suggested to be consumed with the company's pickled radish slice. It retails in a 400g pack.

Claims:
Premium, Ease of Use

Rosengarten Gemüse Cracker Potato Leek Crackers (Germany)

Rosengarten Gemüse Cracker Kartoffel Lauch Gemüse Cracker (Potato Leek Crackers) are new to the range. This organic and vegan product is said to be an alternative for crisps as a snack and is baked instead of fried. These spelt crackers are described as airy, and retail in an 80g pack featuring the EU Green Leaf logo.

Claims:
Organic, Vegan, No Animal Ingredients

Jumbo Roasted Leek (Poland)

Jumbo Prazony Por (Roasted Leek) is now available. The natural product is preservative free and retails in a 100g pack.

Claims:
No Additives/Preservatives

Source: Mintel (2016)

Australian Leek Launches:
L3M (April – July 2016)

Podravka Spring Vegetable Soup

Podravka Spring Vegetable Soup has been repackaged with a new look. The vegetarian product is made with dried vegetables and noodles, and retails in a 60g pack.

Claims:
Vegetarian

Herbert Adams Chicken Leek & Camembert Pie

Herbert Adams Chicken Leek & Camembert Pie is now available. The product is made with leek and succulent RSPCA approved chicken breast, topped with a creamy camembert cheese sauce. It can be heated in the microwave and retails in a 210g recyclable pack bearing the RSPCA Approved Farming and Freedom Farms logos.

Claims:
Microwaveable, Ease of Use

Wild Foodies Veggie and Barley Cluck Soup

Wild Foodies Veggie and Barley Cluck Soup is described as a wholesome medley of spring chicken and fresh garden veggies with a handful of barley. The dairy-free soup contains handmade real chicken stock, is made from natural ingredients, and contains no preservatives, added sugar or MSG. This microwaveable product is locally made in Australia and retails in a 600g pack, containing two servings and featuring the Facebook and Instagram logos. The manufacturer states to be a supporter of OzHarvest charity.

Claims:
Microwaveable, Vegetarian, Ease of Use

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Source: Mintel (2016)

In the Media.

General Vegetable News
(April – July 2016)

- The same marketing techniques used to convince children to eat junk food are highly effective in promoting fruits and vegetables, a new study has found.
- Researchers assigned 10 elementary schools in the United States to one of four groups. In the first, they posted vinyl banners around the salad bar depicting cartoon vegetable characters with "super powers." In the second, they showed television cartoons of the characters. The third got both cartoons and banners, and a control group got no intervention. The study, in Pediatrics, went on for six weeks in 2013.
- Compared to control schools, TV segments alone produced a statistically insignificant increase in vegetable consumption. But in schools decorated with the banners alone, 90.5 percent more students took vegetables. And where both the banners and the TV advertisements were used, the number of students taking vegetables increased by 239.2 percent.
- David R. Just, a professor of applied economics at Cornell said that putting such programs into practice presents some problems. "Schools are left to do their own marketing, and that's not cost effective. These need to be national programs. McDonald's is effective because you see their marketing everywhere."

http://www.nytimes.com

Commodity News
(April – July 2016)

- Eating broccoli is the key to good eyesight and curbing loss of vision, a new study claims. During tests, researchers have found a highly potent concentration of the property could be used to treat age-related macular degeneration, the leading cause of vision loss.
- To reap the benefits, one would have to eat 'an unreasonable amount of broccoli', the team at Buck Institute concede - about 10 times the recommended helping.
- But the researchers hope their study could lead to the discovery of related molecules to develop targeted treatment for sight-loss.

http://www.dailymail.co.uk/

- Tesco has started to sell the world's hottest chilli pepper across the UK.
- The Carolina Reaper is more than 400 times hotter than the jalapeno. Tesco has advised customers not to touch it without wearing gloves.
- Additionally, the supermarket recommends customers not actually eat the chilli and instead remove it from dishes at the end of cooking.

http://www.dailymail.co.uk/

- The UK's first national agricultural technology business plan competition has been won by a lettuce-picking robot. SoftHarvest, working closely with G's Growers, one of the UK's largest vegetable producers, has developed a robotic handler with vision recognition.
- It is estimated that over 60 per cent of the production cost of a lettuce is in the manual harvesting. Automating this process would allow producers to be more competitive and respond faster to demand.

http://www.roboticsandautomationnews.com/

- Sweet corn demand in Europe is currently so strong that the production available is unable to cover it.
- Carlos Olmos, commercial director of Huercasa explained that "The shortage of sweetcorn is the result of an imbalance between supply and demand."
- "The consumption of boiled corn is progressively increasing. According to Carlos Olmos, "barbecues are becoming increasingly fashionable as a leisure option. At the same time, there is a trend to reduce the consumption of meat at these barbecues, with the consequent growth of vegetables."

http://www.freshplaza.com/

Commodity News
(April – July 2016)

- The National Frozen Food Corporation in the United States has recalled frozen green peas and frozen mixed vegetables after the company's tests revealed a potential listeria contamination, the company announced.
- There have been no reported illnesses attributed to the recalled items, according to the National Frozen Food Corp.

http://www.nbcnewyork.com/

- The Kale Yeah! eating competition has challenged individuals to eat as much of the healthy green as possible in eight minutes. According to the Associated Press, the winner was rewarded with $2,000.
- The winner, Gideon Oji ate 25.5 16-ounce containers, approximately 11.5 kilos of kale in just eight minutes.
- Kale Yeah! was part of the Taste of Buffalo festival, run between July 9 - July 10 in Buffalo, New York.

http://mashable.com/

- Tasmanian vegetable producer Harvest Moon suffered 15ha of destroyed leek crops when the Forth River burst its banks in June in some of the worst flooding in 26 years.
- Harvest Moon agricultural director Mark Kable said that it was too early to say the exact cost of the damage but estimated it to be in the hundreds of thousands of dollars.
- Most planted crops had already been harvested prior to the floods.

http://www.freshplaza.com/

Project Harvest Background & Methodology

Background to the research.

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

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

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

This wave's report (Wave 38, July 2016) focuses on:

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

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

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

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Online Methodology.

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

General consumer Questions

Demographics

Vegetable Consumption

1/7 Commodities

Commodity Specific Questions

Category Health

Purchase & Consumption Habits

Price Perceptions & Average Spend

Triggers/Barriers to Purchase

Preparation Preferences

+ 2 Ad hoc Questions per Month

Sample.

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

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

To qualify for the questionnaire, consumers...

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

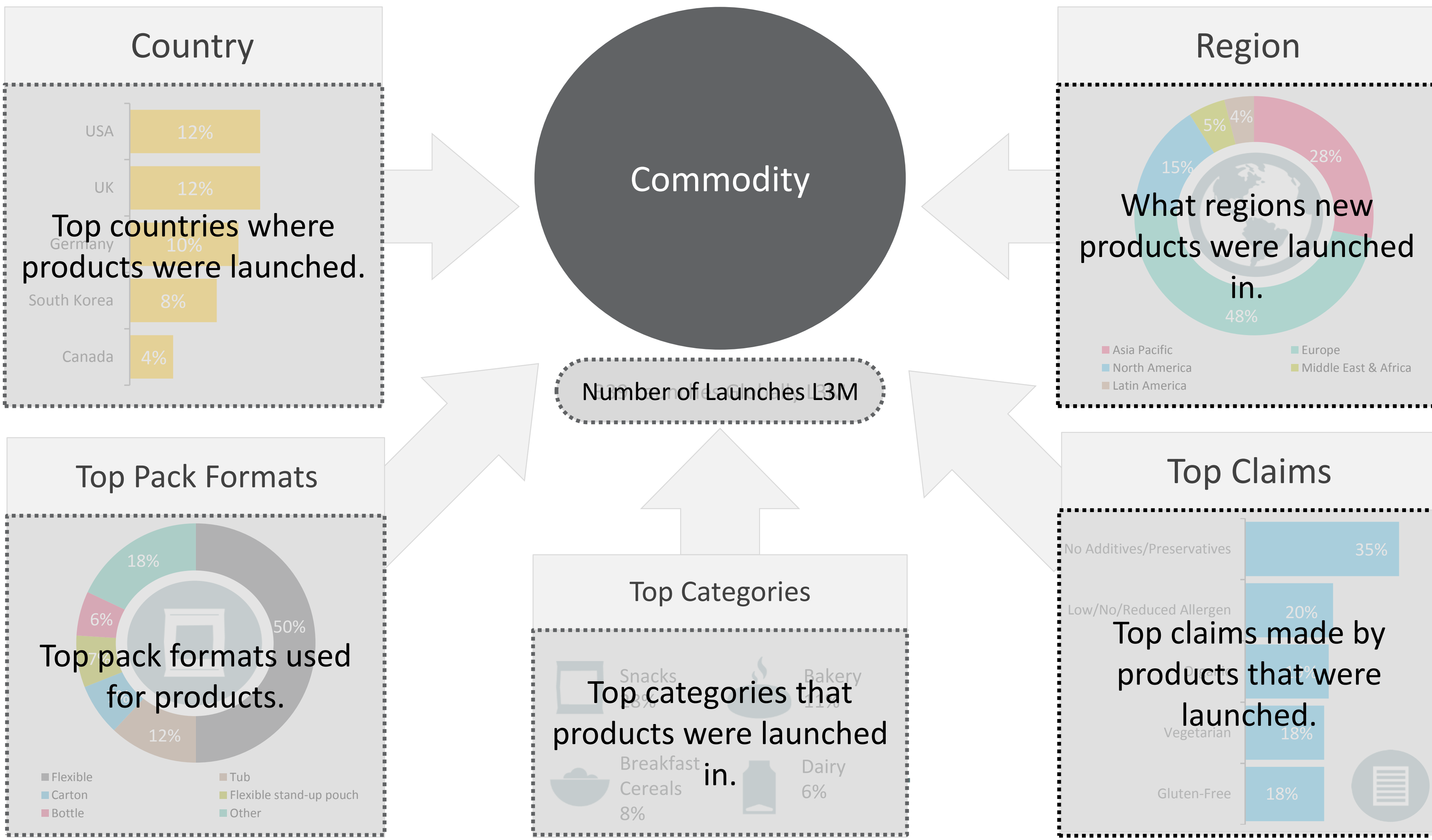
	Broccoli n=302	Chilli n=203	Lettuce n=302	Sweet Corn n=303	Green Peas n=304	Kale n=202	Leek n=200
Gender							
Male	42%	37%	41%	42%	41%	31%	36%
Female	58%	63%	59%	58%	59%	69%	64%
Age							
18-24 y.o.	2%	2%	2%	1%	2%	3%	4%
25-34 y.o.	5%	11%	7%	9%	7%	13%	5%
35-44 y.o.	11%	14%	10%	15%	12%	16%	7%
45-54 y.o.	16%	23%	19%	18%	19%	17%	10%
55-64 y.o.	29%	27%	24%	28%	29%	28%	23%
65+ y.o.	37%	23%	38%	29%	31%	23%	52%
Household							
Single Income no Kids	21%	18%	19%	15%	15%	21%	24%
Double Income no Kids	17%	16%	14%	15%	18%	21%	15%
Young Families	9%	15%	9%	12%	10%	14%	4%
Established Families	19%	21%	20%	24%	25%	20%	13%
Empty Nesters	35%	30%	38%	34%	32%	23%	44%
Location							
New South Wales	17%	21%	17%	22%	19%	21%	17%
Victoria	17%	21%	16%	20%	18%	19%	18%
South Australia	22%	13%	21%	13%	16%	15%	16%
Queensland	18%	17%	17%	13%	15%	18%	23%
Western Australia	14%	19%	15%	16%	16%	16%	15%
Tasmania	8%	5%	9%	11%	11%	7%	7%
Australian Capital Territory	4%	2%	5%	4%	5%	2%	5%
Northern Territory	1%	0%	0%	1%	0%	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 for each vegetable commodity being tracked this month.
- Our main source of secondary data for this report was collected from Mintel Global New Products Database (GNPD).
- This data source is used to analyse products launched around the globe in the last three months (L3M) that contained each vegetable being tracked as a core ingredient.
- Trends are determined at a global and regional level.
- Claims and pack types used for the launched products are explored and the relevant product categories are determined. Specific examples of products being launched around the globe that are particularly innovative are displayed for reference.
- Trend reports are provided monthly and will reflect the 7 commodities tracked in the preceding period.

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

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



Thanks.