



Project Harvest Monthly Tracker Report.

Wave 39, August 2016

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

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

**Horticulture
Innovation**
Australia



colmar brunton.



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Wave 39: Executive Summary



Industry Insight

Previously, the Project Harvest Vegetable Consumption Tracker reported that on average children consumed 2.4 serves of vegetables per day – fewer than the Australian Guide to Healthy Eating recommendation of 2.5 to 5.5 serves. This illustrates why there is such a concern around unhealthy diets and why this is a current focus for Hort Innovation, as well as for other national institutions.

In October 2015, the Royal Children’s Hospital surveyed a nationally representative sample of 1993 adults for their “Top Ten Child Health Problems” report. The results reveal that an Unhealthy Diet was ranked in the top four concerns, coming in after Excessive Screen Time, Obesity and a Lack of Physical Activity. Most interestingly, there was a positive correlation between children’s age and parents’ concerns about their unhealthy diets; however, according to concerns raised by the Australian Institute of Food Science and Technology (AIFST), perhaps we should be equally worried about our youngest consumers.

Industry Insight cont.

Sarah Hyland, General Manager of Industry Services at AIFST has broached a concern around raising “generation suck” who drink food with no need for chewing. The food trend around convenient pouches, often filled with yoghurt, fruit puree or vegetable puree has appeared to decrease arguments with tantrum-prone toddlers around consuming food with different textures and flavours. There are a number of potential issues with this trend for toddlers including the potential to hinder jaw development and language development in addition to food and sensory literacy.

Similarly concerning is the high levels of sugar these products often contain – even in the vegetable purees which are often sweetened with fruit to make them more ‘palatable’.

Recommendations for healthy toddler development, a sound food and sensory literacy and an appreciation for food in its natural state centre around reassuring parents that food rejection is normal and that experiencing the true colour, aroma, texture and flavour of foods teach our children how to eat for the future. With a persistence for everything in moderation and encouraging an awareness of food in its natural state, one day we may stand the chance of meeting our standard serve of vegetables a day!



Cabbage Grower Action Plan.

Wave 39 Fast Facts

- Consumers are highly satisfied with cabbage and are likely to recommend it to friends and family.
- On average cabbage is purchased 3 times per month and consumed on 8 occasions per month. Mainstream retailers are the typical purchase locations.
- Relatively consistent with previous months, consumers typically purchase 1.0kg of cabbage. Consumers perceive cabbage to be good value for money. Individual whole and half cabbages are the preferred formats.
- Overall awareness of cabbage types remains relatively low. The most recalled variety was red/purple, consistent with past waves.
- The key motivations for purchasing cabbage are its ease to cook with and to use as an ingredient in dishes. The main barriers to purchase are already consuming enough and not wanting to waste any.
- Cabbage is expected to remain fresh for approximately 10 days. Expectations of freshness are increasingly being met all of the time.

38%

of consumers eat cabbage as part of a quick meal.

1.

Insight:

Cabbage's subtle flavour and health benefits encourages purchase for family friendly meals.

Short Term Recommendation:

The subtle flavour of cabbage makes it a suitable addition to any recipe, which will in turn increase the number of servings of vegetables.

Provide cooking ideas on-pack or at point of sale i.e. cabbage provides colour and crunch to stir fries, and could be used as a lettuce substitute in sandwiches.

2.

Insight:

Consumers perceive cabbage as good value for money, with shelf life expectations strengthening.

Long Term Recommendation:

To capitalise on increasing satisfaction, educate consumers on the versatility of cabbage by making it a household staple.

Long shelf life ensures that cabbage can always be on hand in the fridge to be quickly cooked in a meal.





Celery Grower Action Plan.

Wave 39 Fast Facts

- Celery continues to perform below average on the majority of category health and consumer sentiment measures, except for satisfaction.
- Celery is purchased three times per month and consumed on average nine occasions per month, which has slightly increased since the previous wave.
- Consumers purchase whole bunches of celery. Recalled last spend is \$2.90, relatively consistent with past months. Overall, celery is perceived to be good value for money.
- Price tracking indicates the average price per bunch of celery in August 2016 is \$4.39, noticeably higher than prices recorded in April 2016 (\$2.60).
- Spontaneous awareness of celery types remains very low, with 80% of consumers unable to state a type.
- Top triggers to purchase are to use as an ingredient in dishes, health and ease of preparation. Limiting waste is the main barrier to purchase.
- Consumers expect celery to remain fresh for ten days, with longevity perceptions remaining consistent over recent waves.

9.0

times per month

is the average number of times celery is consumed.

1.

Insight:

This month sees a noticeable increase in the average price of celery, which has negatively affected value for money perceptions.

Short Term Recommendation:

If end of season availability has affected the price, communicate seasonality with consumers to manage price expectations.

2.

Insight:

Consumer sentiment is lower than the Vegetable Average and purchase looks to remain stagnant.

Long Term Recommendation:

Consumers need to be re-engaged with celery to increase importance and satisfaction with the vegetable. Highlighting the ease of preparation and versatility of cooking styles will help improve sentiment.





Wave 39 Fast Facts

- ▶ Consumers are generally satisfied with cucumbers, which sits above the Vegetable Average on the majority of measures.
- ▶ Cucumber is purchased on average 5 times per month and consumed around 12 times per month. Purchase is primarily made through mainstream retailers.
- ▶ Weight of purchase remains stable this wave, with consumers purchasing on average 700g of cucumber.
- ▶ Price tracking of Lebanese cucumbers reveals a national average of \$7.63 per kg in August, which is substantially higher than the previous wave (\$4.27 per kg in April 2016).
- ▶ Approximately one third of consumers are unable to recall a type of cucumber. Lebanese and Continental/Telegraph types hold the greatest recall.
- ▶ Cucumber is expected to stay fresh for 8 days, with expectations generally met.
- ▶ Key drivers of purchase are predominately influenced by taste and health. Barriers to purchase are not wanting to waste any and already consuming enough.

61%

of consumers eat cucumber during lunch.

1.

Insight:

Stir frying of cucumber is now the second most common cooking style.

Short Term Recommendation:

Promoting alternative cooking styles increases the perceived versatility and prominence of cucumber in consumers' repertoire. Providing new recipes and cooking styles at point of sale may prompt greater inspiration.

2.

Insight:

The versatility of cucumber is a trigger to purchase for consumers.

Long Term Recommendation:

The versatility of cucumber extends beyond food and beverage. Investigate New Product Development (NPD) in the beauty and skincare category, which represents a valuable market overseas, however largely untapped domestically.





Zucchini Grower Action Plan.

Wave 39 Fast Facts

- ▶ Consumers are generally satisfied with zucchini, and hold high levels of endorsement.
- ▶ Consumers purchase zucchini on average 4 times per month and consume 8 times per month. Key retailers for zucchini purchase remain mainstream and specialist stores.
- ▶ Weight of purchase (800g), recalled last spend (\$3.30) and value for money (6.7/10) all increased this wave.
- ▶ Zucchini's national average price is significantly higher, sitting at \$5.87 per kg in August 2016 compared to \$3.65 per kg in April 2016.
- ▶ Awareness of zucchini types remains very low, with nearly three quarters of consumers unable to name a variety. Those who can are largely prompted by colour.
- ▶ Zucchini is expected to remain fresh for just over a week, with expectations of freshness likely to be met most of the time.
- ▶ Top triggers to purchase are ease of preparation and to use as an ingredient in dishes. Consumers limit purchase of zucchini because they already consume enough and don't want to waste any.

\$5.87
per kg

was the average price recorded for zucchinis in Wave 39.

1.

Insight:

Only 40% of consumers have purchased zucchini over the last month.

Short Term Recommendation:

Encourage new consumers to purchase and consume zucchini by highlighting the versatility of the vegetable through its multiple cooking styles. Popular cooking styles with regular consumers are stir frying, steaming and roasting.

2.

Insight:

Taste is an increasing trigger to purchase.

Long Term Recommendation:

Providing consumers with flavour descriptions at point of sale will help to prompt trial. This will particularly appeal to Flavour Follower consumers.



Wave 39 Fast Facts

- ▶ Eggplant has low importance relative to the Vegetable Average, but holds strong levels of interest, satisfaction, endorsement and future purchase intent.
- ▶ Purchase occasions occur approximately three times per month, slightly lower than the previous wave, whilst eggplants are consumed four times per month. Mainstream and specialist retailers are the main outlets for purchase.
- ▶ Consumers purchase 800g of eggplant per shop. Recalled last spent has remained relatively consistent at \$4.10, with value for money perceived as fair (6.1/10).
- ▶ Pricing analysis revealed the national average price for purple eggplant is \$8.06 in August 2016, which is higher than \$7.24 in April 2016.
- ▶ Unprompted awareness of eggplant types remains low, with approximately two thirds of consumers unable to recall a type.
- ▶ Key influences to purchase are taste and to use as an ingredient in dishes. Key barriers to purchase are wanting a variety of vegetables in their diet and price.
- ▶ Eggplant is expected to remain fresh for just over a week. This expectation is being met most of the time.

6.1/10

is the perceived value for money for eggplants.

1.

Insight:

Wastage is a key barrier to purchase. However, there is interest in new eggplant varieties.

Short Term Recommendation:

Educate consumers on alternative varieties of eggplant including Lebanese and Thai eggplants. These varieties are typically smaller and therefore suitable for one dish use, therefore limiting wastage.

2.

Insight:

Over the past twelve months, there has been an increase in grilling vegetables. Globally there has been a lack of New Product Development (NPDs) containing eggplants.

Long Term Recommendation:

Investigate opportunities to develop eggplant grill packs. Possibilities include; mixed grilled packs, eggplant grill packs, pre-grilled and ready-to-eat options that will appeal to time conscious consumers.





Wave 39 Fast Facts

- ▶ Consumers are generally satisfied with spring onions, sitting in line with the Vegetable Average. The majority of consumers indicate they intend to purchase the same amount as they currently do.
- ▶ Purchase frequency of spring onion occurs 3 times per month and it is consumed on 8 occasions per month on average, both higher than the previous wave.
- ▶ On average, consumers purchase 400g of spring onion and recalled spending \$2.50 on their last shop.
- ▶ Analysis of national pricing revealed an average price of \$2.32 each. Spring onion is perceived to be fair value for money (6.2/10).
- ▶ Awareness of spring onion varieties is very low, with 84% unable to recall a type.
- ▶ The primary triggers to purchase are to use as an ingredient and great taste. Limiting waste remains the main barrier to purchase.
- ▶ Consumers expect spring onion to remain fresh for over a week, and this longevity is likely to be met most of the time.



is the number of days spring onions are expected to remain fresh.



Insight:

Consumers purchase spring onions because they are easy to prepare/ cook with.

Short Term Recommendation:

Provide consumers with recipe ideas at point of sale that highlight the ease of spring onion preparation. Quick meals would also appeal to time-conscious consumers.



Insight:

Wastage remains the primary barrier to future purchase intent.

Long Term Recommendation:

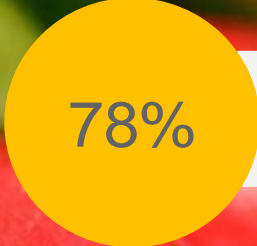
Consumers require education on the usability of the full spring onion, including the root to stem. Greater availability of loose formats may also reduce the amount of household wastage.



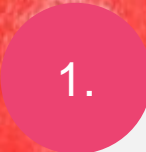


Wave 39 Fast Facts

- ▶ Radish has high levels of importance, endorsement, interest and future purchase intent.
- ▶ Radishes are purchased on average five times per month and consumed ten times per month. Purchase is primarily from mainstream retailers.
- ▶ On average consumers are purchasing 700g of radish. Recalled last spend was \$4.20, with value for money perceived to be fair (6.4/10). All three measures have increased since the previous wave.
- ▶ Price tracking revealed an average price of \$3.22 per bunch in August 2016, consistent with prices tracked in April 2016 (\$3.18 per bunch).
- ▶ Awareness of radish types is very low, with approximately two-thirds of consumers unable to recall a type.
- ▶ The main motivations for purchasing radish are the taste and complementing other food. Already consuming enough and price are the key barriers to purchase.
- ▶ Radish is expected to stay fresh for approximately 9 days, however there is a continuous decline in these expectations being met.



of consumers eat radish raw.

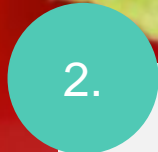


Insight:

Price is inhibiting purchase of radishes, with only one in ten consumers purchasing radish monthly.

Short Term Recommendation:

To encourage trial of radish ensure loose formats are available at retailers. This limits the expense outlay, whilst consumers familiarise themselves with this vegetable. Recipe ideas at point of sale may increase trial success and encourage repurchase.



Insight:

Specific health benefits of radishes is becoming a more important reason for purchase.

Long Term Recommendation:

Highlight specific health benefits of radish where possible. This includes vitamin content, folate and fibre. Providing tangible health benefits such as weight loss, and improvement of immune system will increase purchase and consumption frequency.



Wave 39:
Response to Ad hoc
Questions

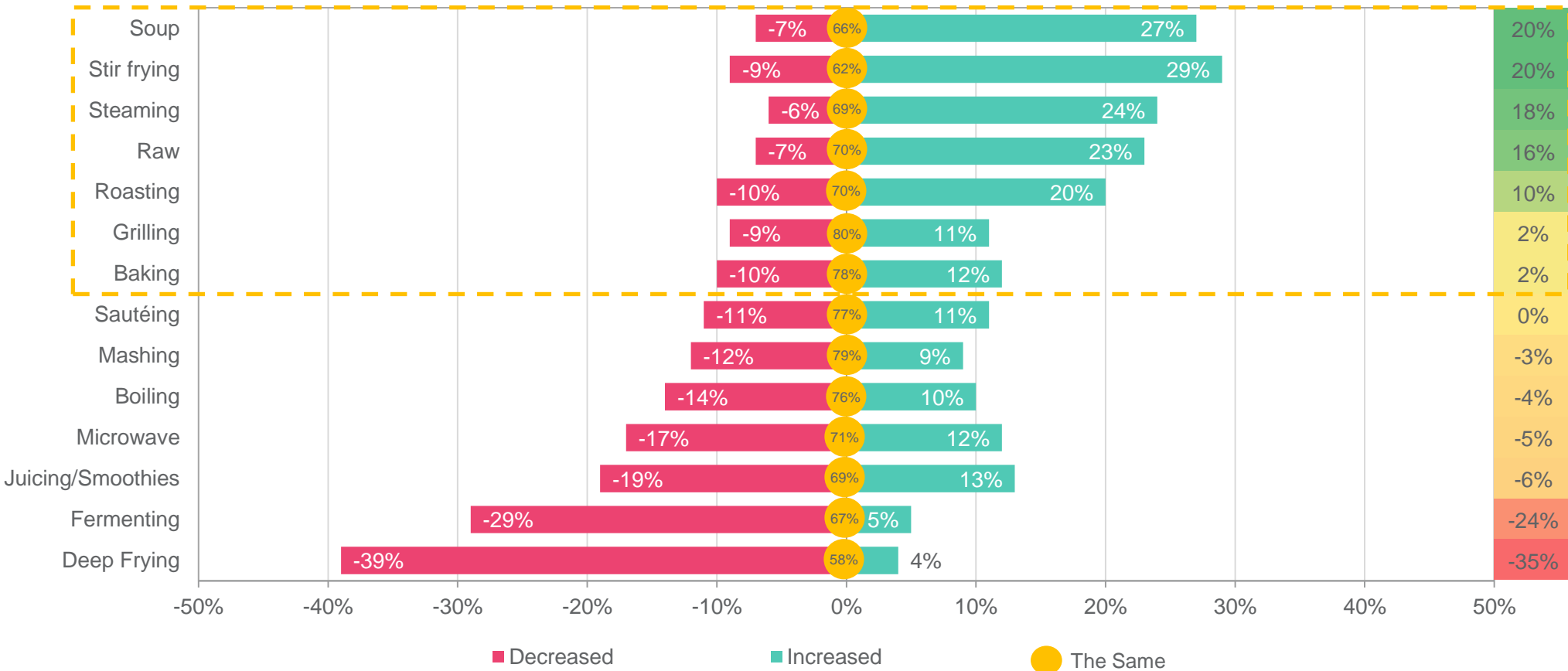




There has been an increase in soups, stir frying, steaming, eating vegetables raw and roasting as cooking styles over the last twelve months. Grilling has slightly increased with a net gain of 2%.

Change in Cooking Styles

NET.

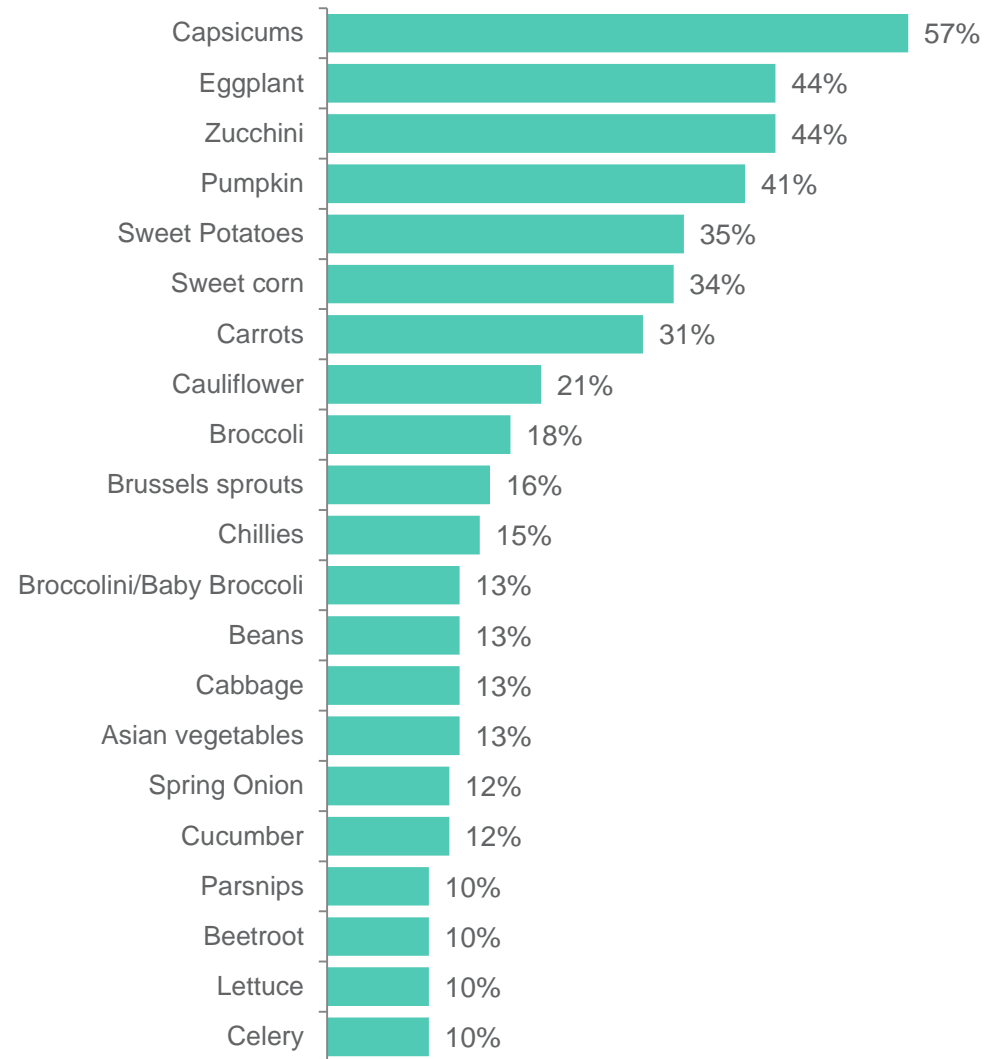


AHW39Q1. In the last 12 months, have you increased, no change or decreased your vegetable cooking of the following styles
N=376



Typical Vegetables Grilled.

Consumers who increased their grilling of vegetables over the past year indicated that they typically grilled vegetables such as capsicums, eggplant, zucchini and pumpkin. Other popular options included sweetpotatoes, sweet corn and carrots.





Wave 39: Overall Vegetable Tracking

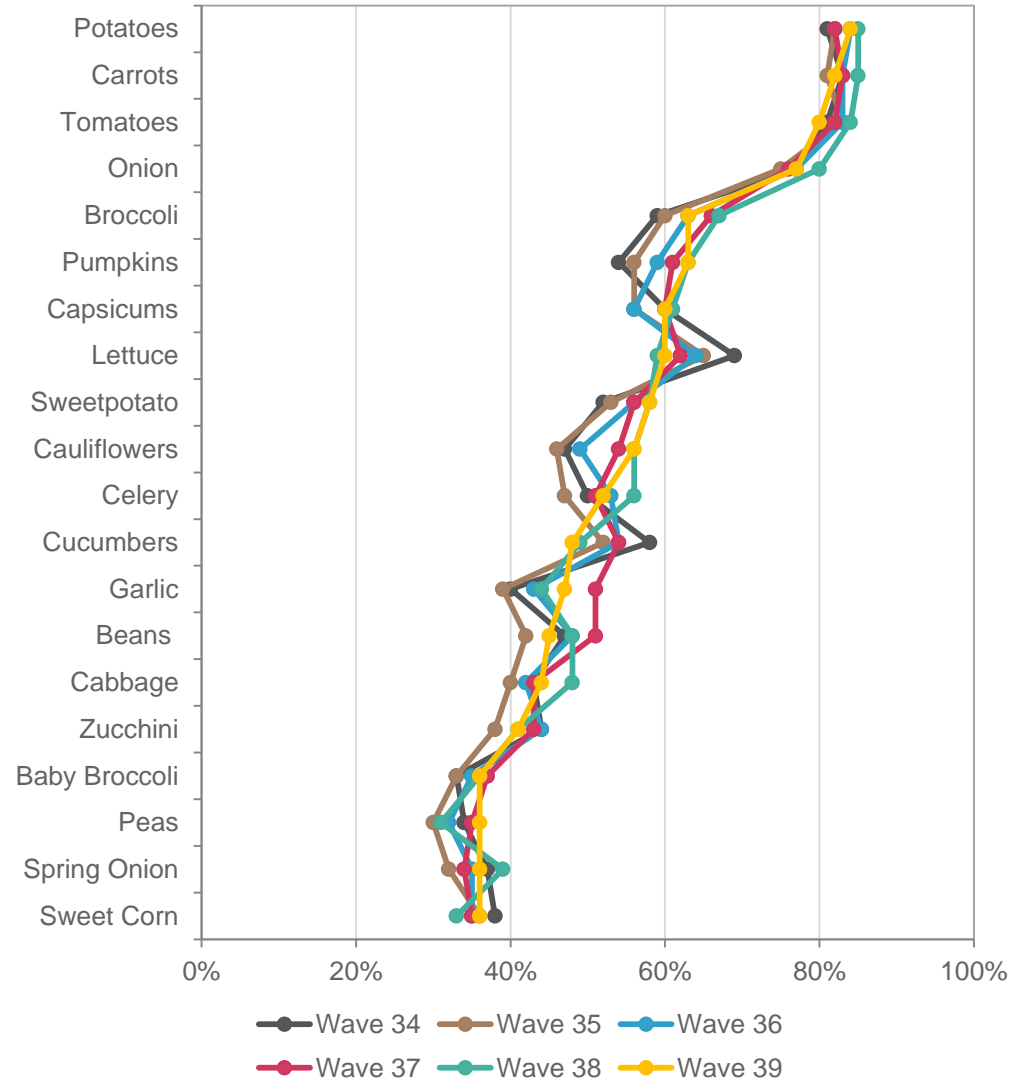




Vegetables Purchased Last Month.

Potatoes, carrots, tomatoes and onions were the most purchased vegetables in August.

The biggest decline in purchase this wave included tomatoes, broccoli, celery, cabbage and leeks.



Sample Wave 39, N=1157
S8. Which of the following fresh vegetables have you purchased in the last month?



Category Health Explained

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

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

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





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

Both radish and eggplant have strong future purchase intent, with the former noticeably increasing this wave.

	Cabbage	Celery	Cucumber	Zucchini	Eggplant	Spring Onion	Radish	Vegetable Average
Importance	6.8	6.2	6.5	6.6	5.7	6.4	6.6	6.4
Satisfaction	7.3	6.9	7.0	7.0	6.8	6.9	6.7	6.7
Endorsement	7.1	6.7	6.9	7.3	7.2	7.0	7.1	7.0
Interest (New Varieties)	6.7	5.9	6.4	6.5	6.6	6.3	7.0	6.3
Future Purchase								
More	18%	11%	16%	13%	21%	11%	31%	16%
Same	81%	87%	83%	85%	77%	89%	67%	83%
Less	1%	1%	1%	2%	3%	0%	1%	1%

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



Cabbage.

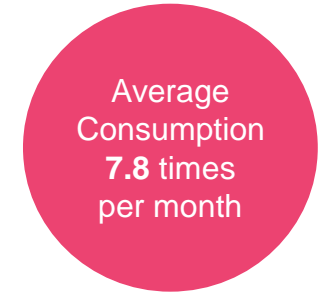


The past wave has seen an increase in purchase and consumption frequency of cabbage.

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

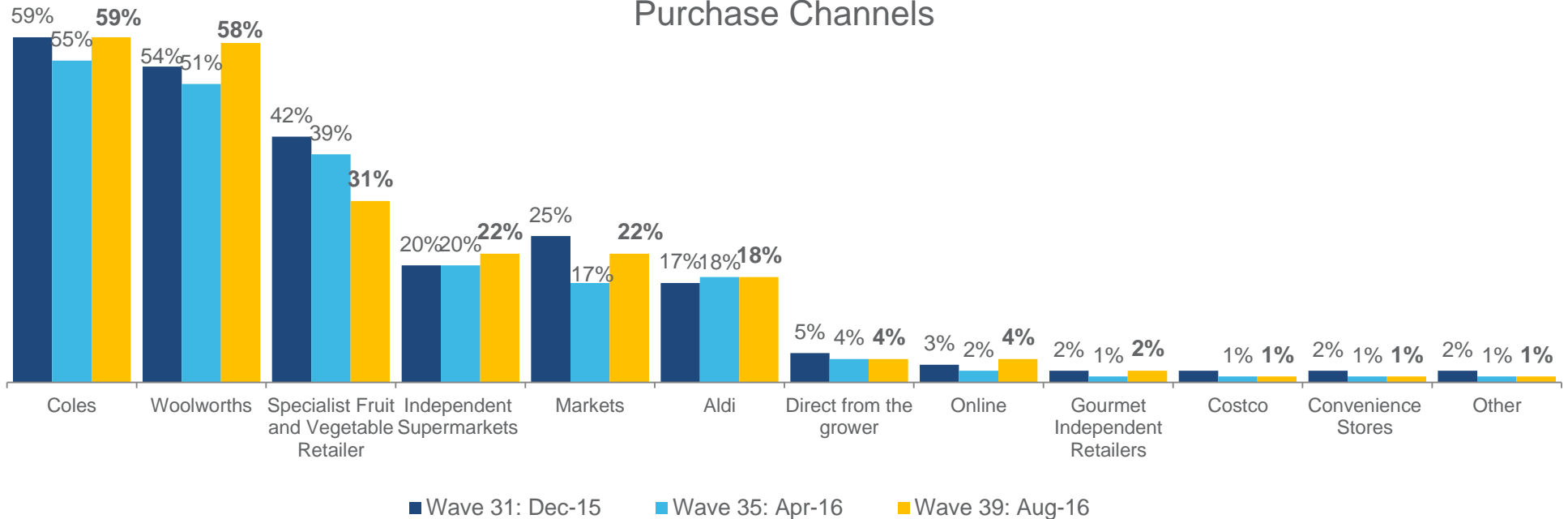


3.5 times, Wave 31
2.9 times, Wave 35



7.7 times, Wave 31
7.5 times, Wave 35

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 31 N=306, Wave 35 N=307, Wave 39 N=208



Average Spend and Price Sensitivity



Average weight of purchase

The average consumer typically purchases **1.0kg** of cabbage, which is consistent with the previous waves.

- 1.0kg, Wave 31
- 1.0kg, Wave 35



Recalled last spend

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

- \$3.00, Wave 31
- \$3.00, Wave 35



Value for money

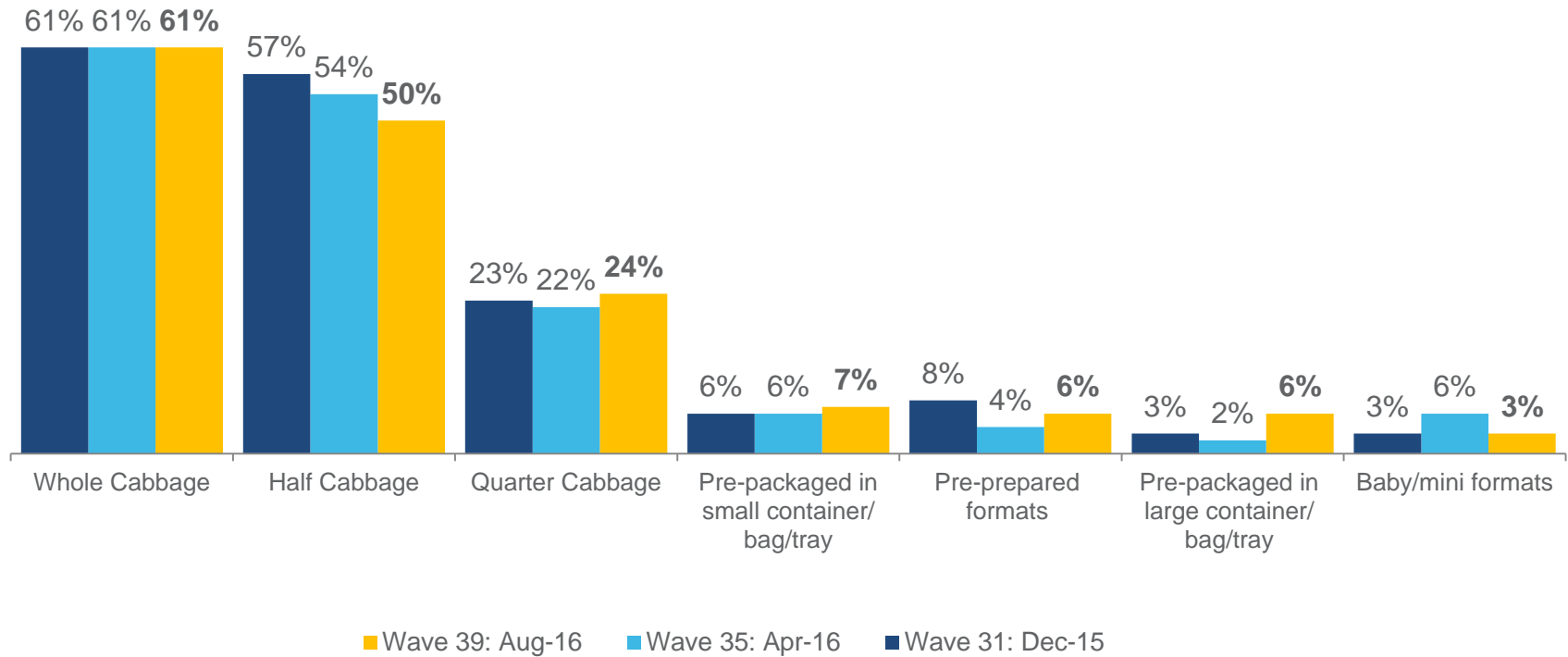
On average, consumers perceived cabbage to be very good value for money (**7.0/10**), which has continued to increase this wave.

- 6.7/10, Wave 31
- 6.8/10, Wave 35

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 31 N=306, Wave 35 N=307, Wave 39 N=208



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

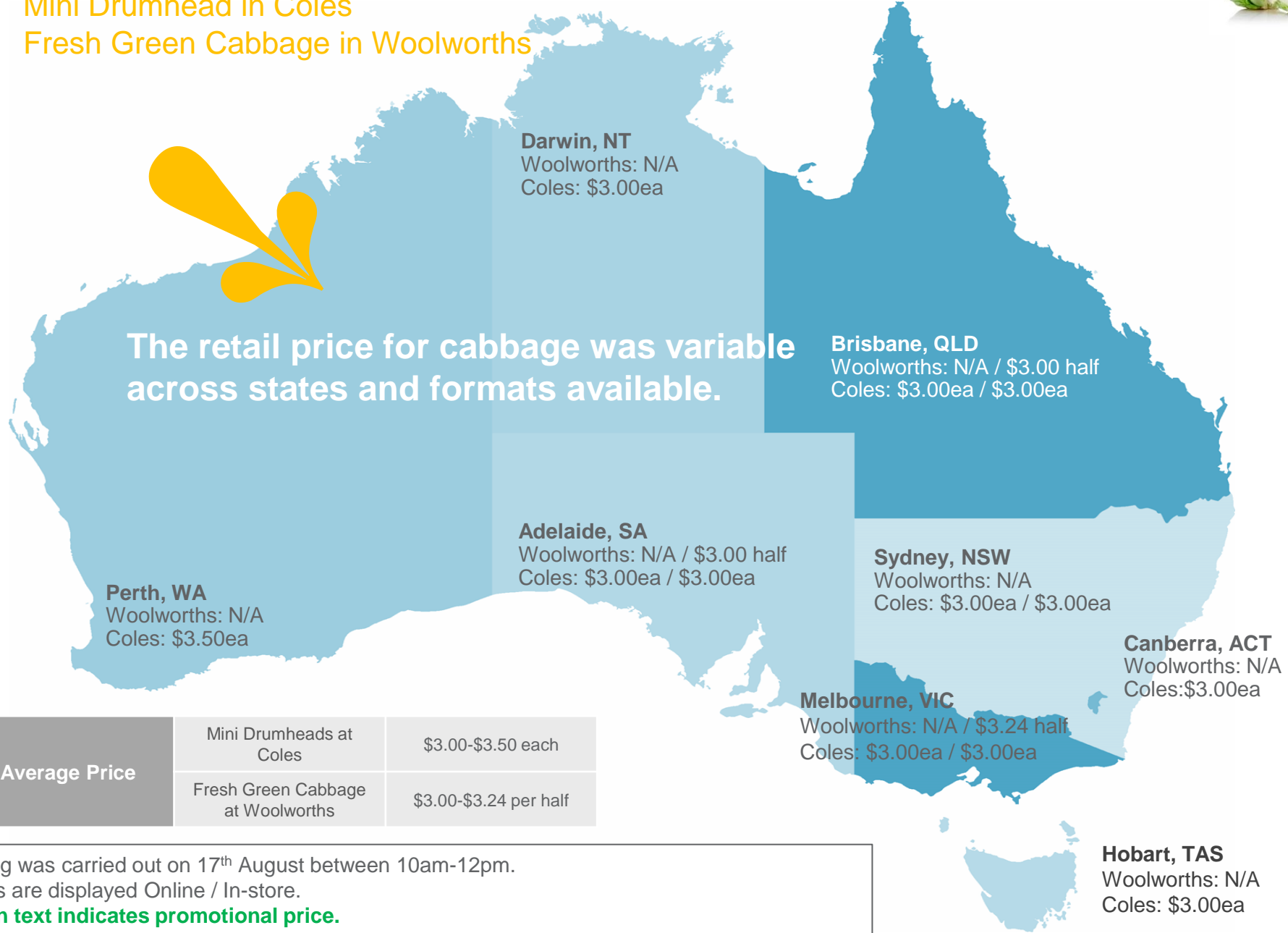


Online and In-store Commodity Prices



Mini Drumhead in Coles

Fresh Green Cabbage in Woolworths



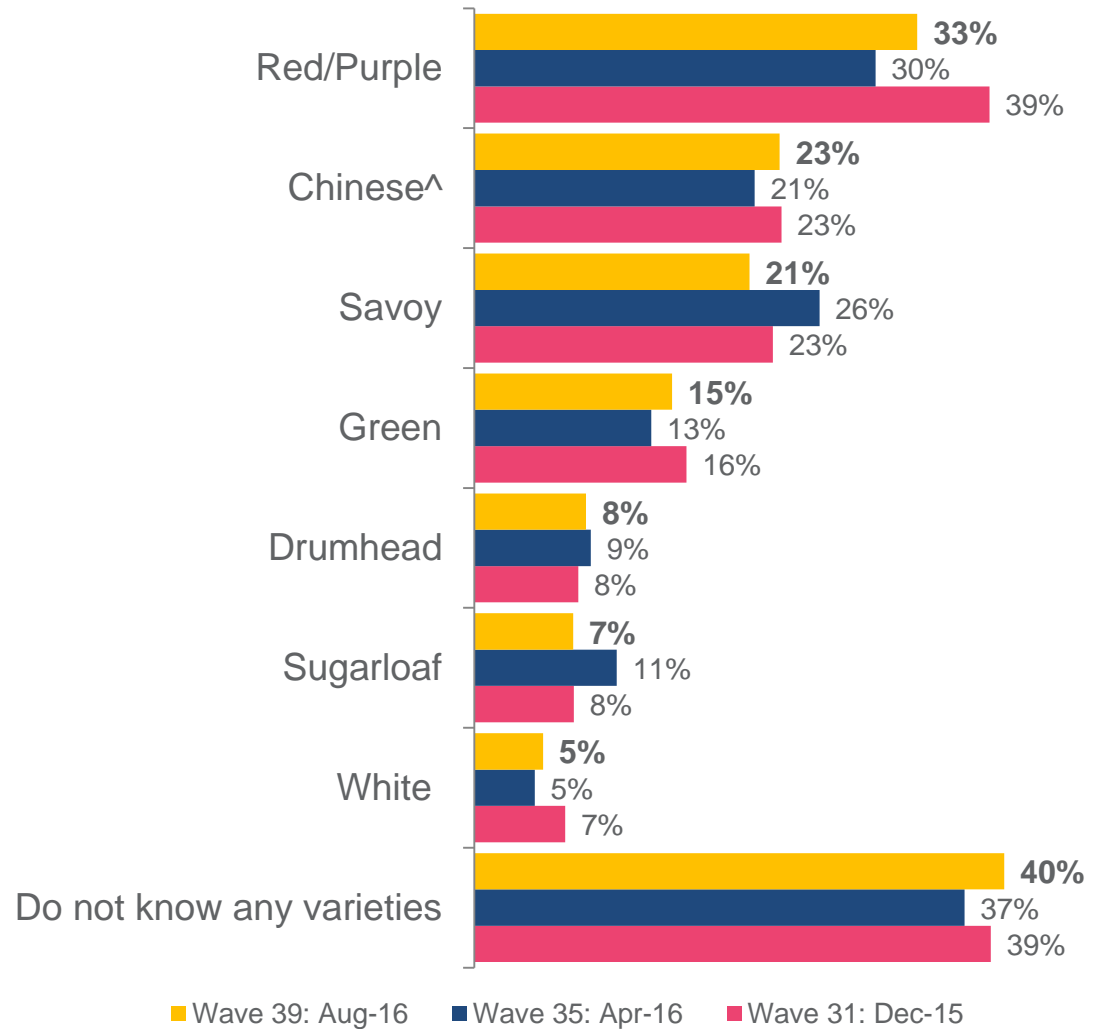
Average Price	Mini Drumheads at Coles	\$3.00-\$3.50 each
	Fresh Green Cabbage at Woolworths	\$3.00-\$3.24 per half

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



Over one in three consumers are unable to recall a type of cabbage.

Red/Purple varieties remained the most recalled type of cabbage. Chinese cabbage (Wombok) and Savoy are also popularly recalled types.



Q6a. What varieties of <commodity> are you aware of? (unprompted)

[^]Chinese cabbage (Wombok) is recalled as a type of cabbage but is a different species than 'standard' cabbage

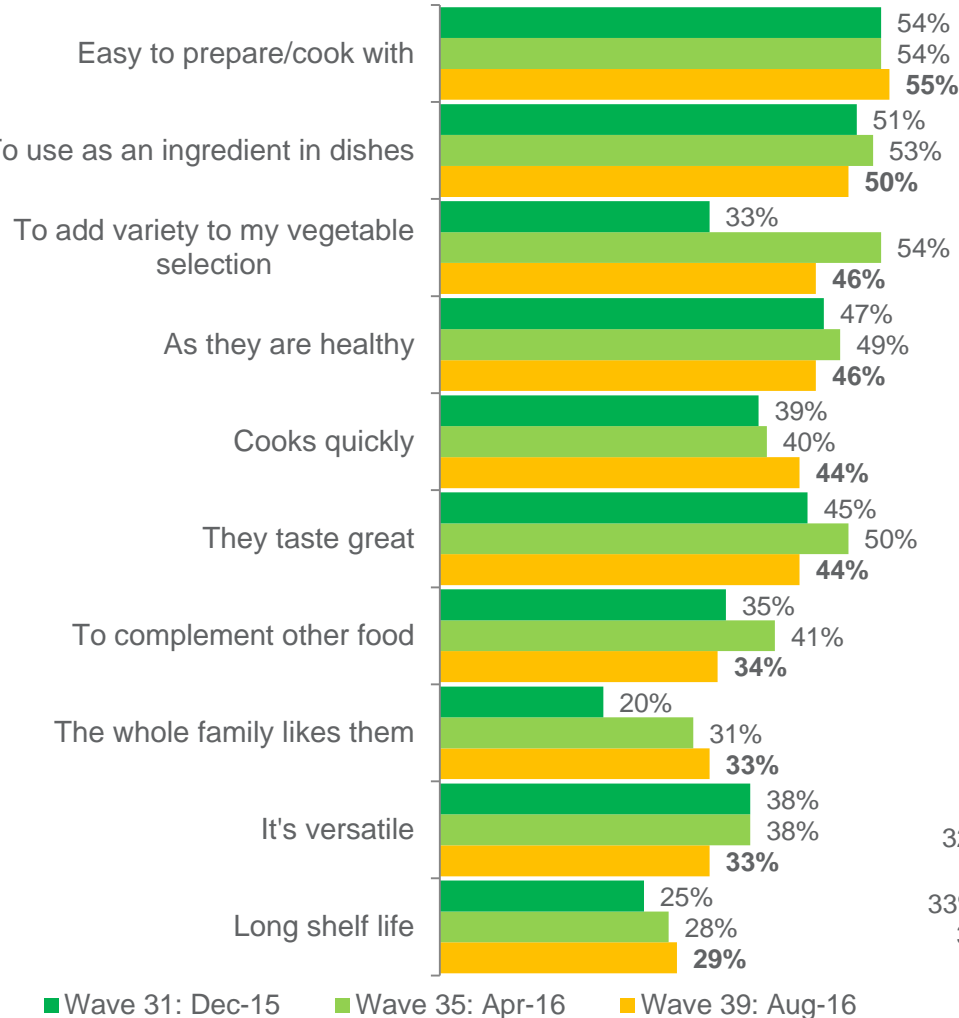
Sample Wave 31 N=306, Wave 35 N=307, Wave 39 N=208



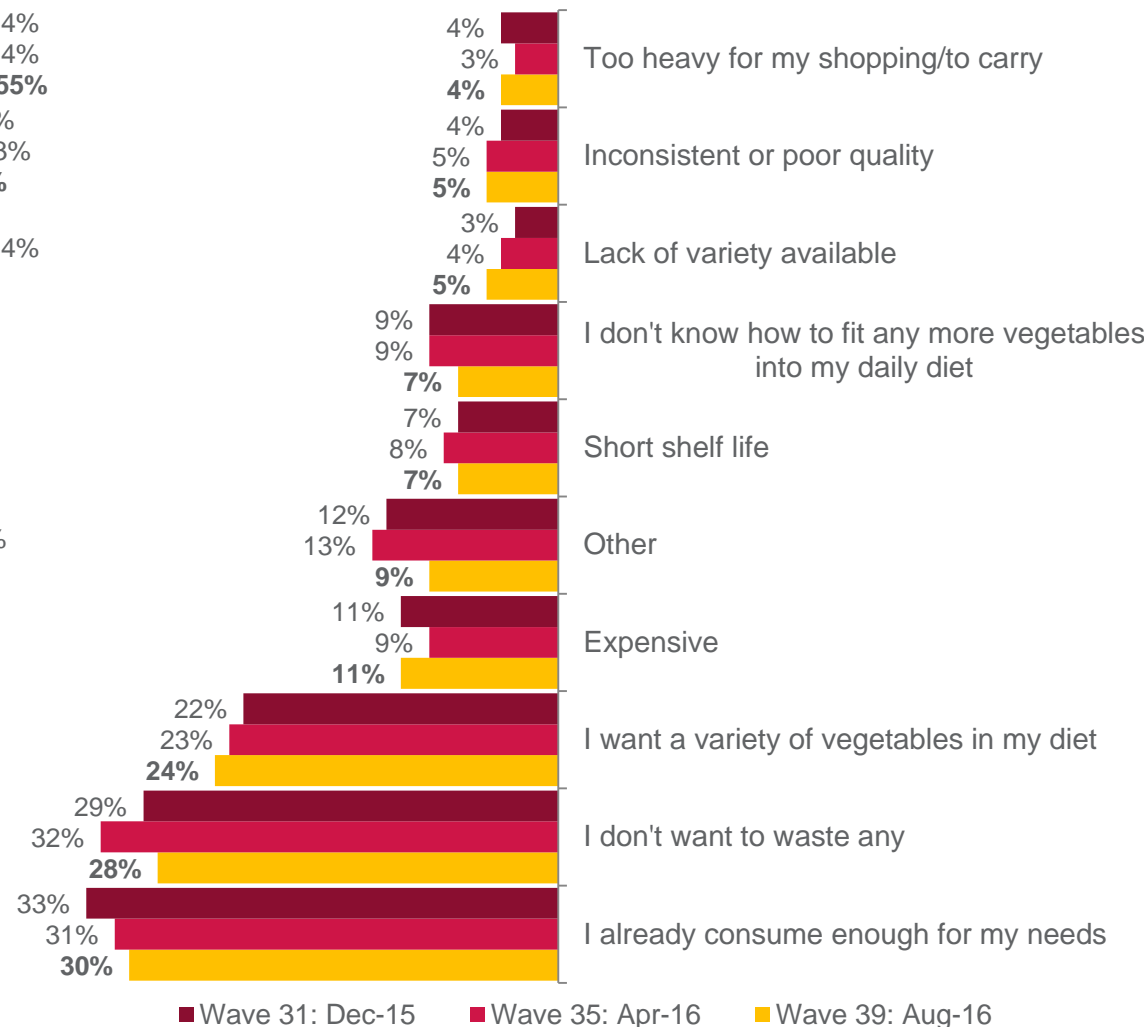
Ease of preparation and use as an ingredient in dishes are the main drivers to consumers purchasing cabbage, while already consuming enough and not wanting to waste any are the main barriers inhibiting purchase. There has been a continuous increase in cooking quickly, the whole family liking them, and long shelf life 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 31 N=306, Wave 35 N=307, Wave 39 N=208



Chinese cuisines are popular when cooking cabbage dishes.

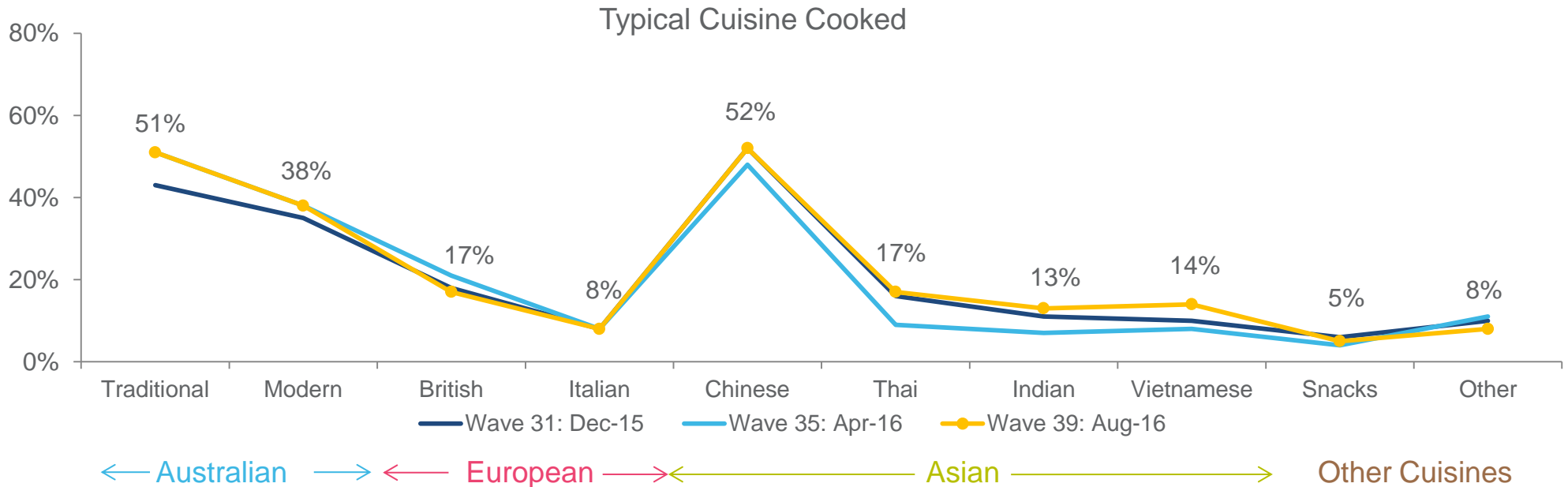
There has been a noticeable increase in cabbage being consumed as a quick meal this wave.

Top 5 Consumption Occasions

	Wave 35	Wave 39
Dinner	77%	69%
Family meals	61%	57%
Weekday meals	49%	44%
Quick Meals	25%	38%
Weekend meals	43%	36%

16%
used cabbage when cooking a new recipe

▼ 11%, Wave 35



Q10. What cuisines do you cook/consume that use <commodity>?
 Q11. Which of the following occasions do you typically consume/use <commodity>?
 Sample Wave 31 N=306, Wave 35 N=307, Wave 39 N=208



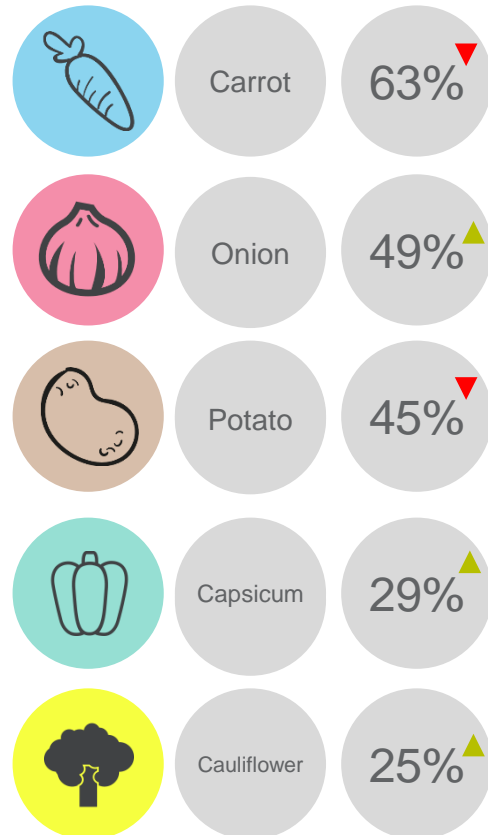
▼ : Indicates LOWER score than current wave.
 ▲ : Indicates HIGHER score than current wave.



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

Consumers typically stir fry, steam or eat cabbage raw. There has been a slight upwards trend in frying cabbage as a cooking style over the last three waves.

Accompanying Vegetables



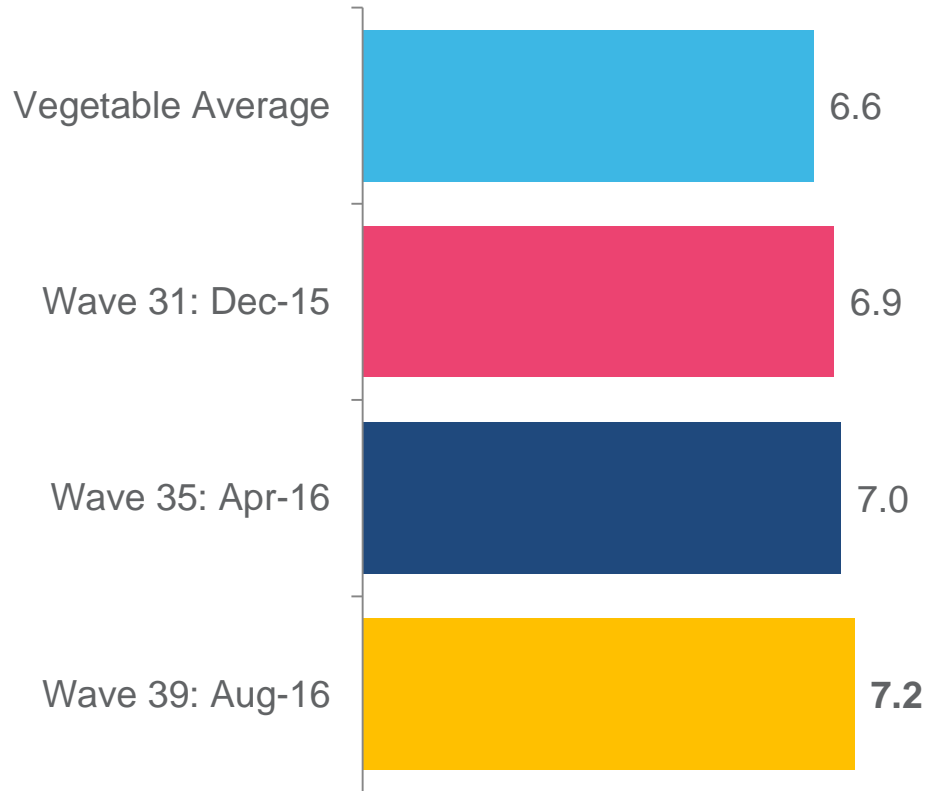
Top Cooking Styles

	Wave 31	Wave 35	Wave 39
Stir frying	58%	53%	62%
Steaming	43%	44%	39%
Raw	48%	42%	35%
Boiling	31%	41%	35%
Soup	23%	23%	29%
Saut�eing	24%	22%	24%
Frying	17%	18%	21%
Slow Cooking	17%	14%	14%
Microwave	9%	10%	9%
Baking	4%	3%	6%

Q9. How do you typically cook <commodity>?
 Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
 Sample Wave 31 N=306, Wave 35 N=307, Wave 39 N=208



Importance of provenance has slightly increased this month, and continues to be key to consumers, especially cabbage grown in Australia.



Q14. When purchasing <commodity>, how important is Provenance to you?
Q15. And when purchasing Cabbage, how important is that it is grown in Australia?
Sample Wave 31 N=306, Wave 35 N=307, Wave 39 N=208

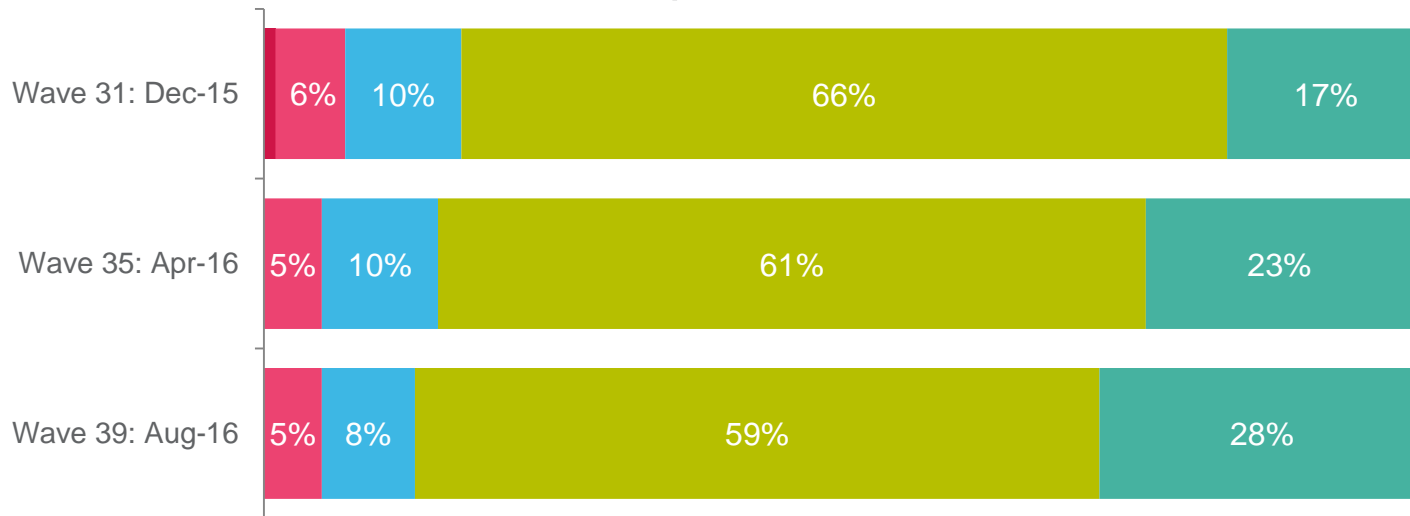


Cabbage is expected to remain fresh for 10 days once purchased. These expectations are increasingly being met all of the time.

Expected to stay fresh for **10.3 days**

- ▼ 9.8 days, Wave 31
- ▼ 10.1 days, Wave 35

Expectations Met



■ Never met ■ Rarely met ■ Met some of the time ■ Met half of the time ■ Met most of the time ■ Always 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 31 N=306, Wave 35 N=307, Wave 39 N=208



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

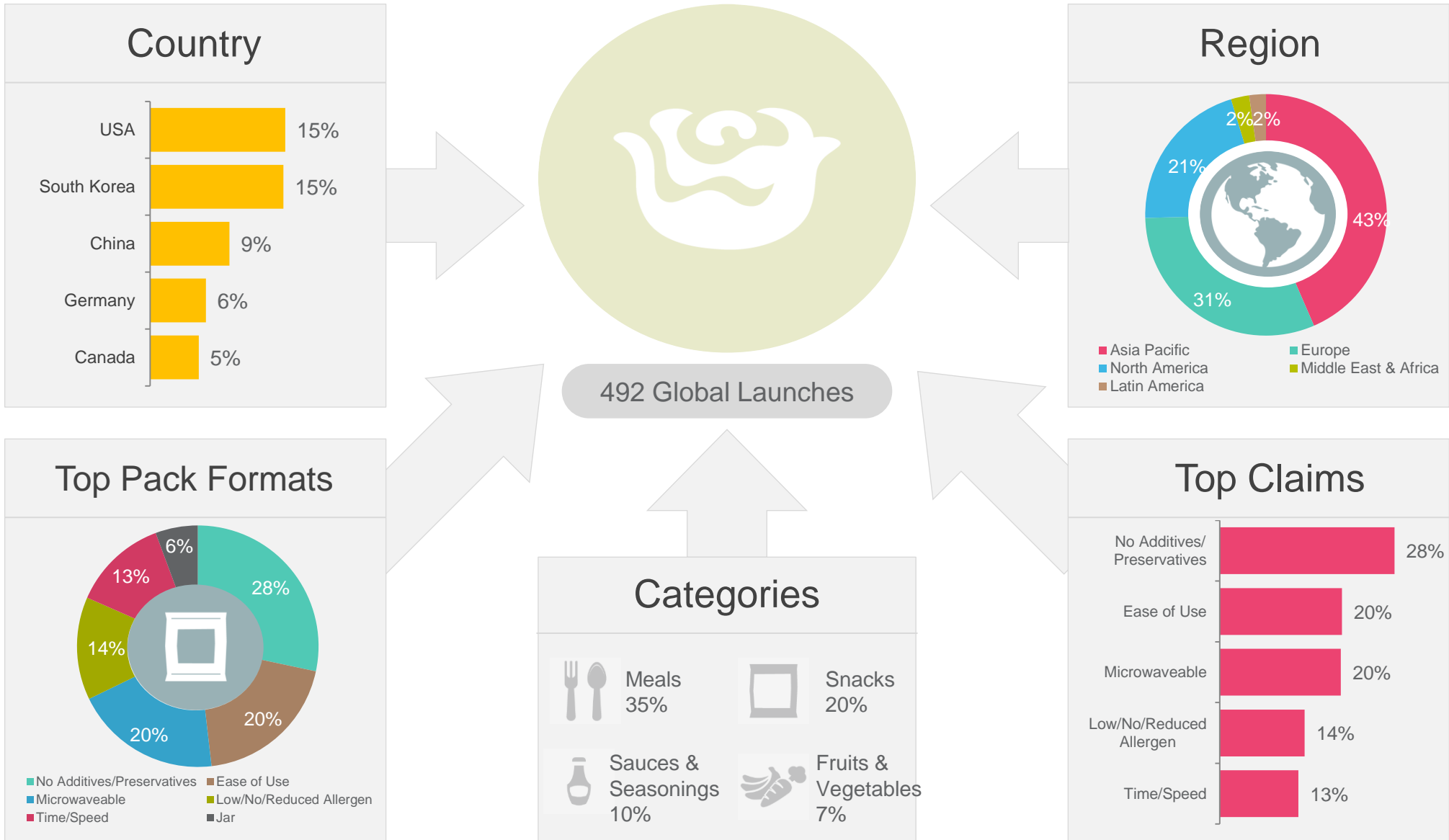


Trends: Cabbage

Cabbage Global NPDs

May – August 2016

There were 492 global launches of products containing cabbage as an ingredient. The majority of launches occurred in Asia Pacific and Europe. No additives/preservatives and ease of use claims were common with products launched. The most commonly launched product were meals and snacks, consistent with previous waves.





Cabbage Product Launches: Last 3 Months (May – August 2016) Summary

- There were 492 products containing cabbage as an ingredient that were launched globally. This was slightly higher than the number of launches in the previous wave.
- There were six Australian launches generally consisting of soups and stock.
- Asia Pacific (43%) and Europe (31%) were the dominant launch regions for cabbage products. USA and South Korea were the main countries for launches.
- A large proportion of products launched were meals and meal centres (35%). Snacks (20%) and sauces and seasonings (10%) were also common categories for products.
- No additives/preservatives was the top claim utilised (28%). Convenience claims were also common, including ease of use (20%) and microwaveable (20%).
- The most innovative product launched was Stuffed Cabbage Rolls with Pork in Romania (see following pages).



Source: Mintel (2016)

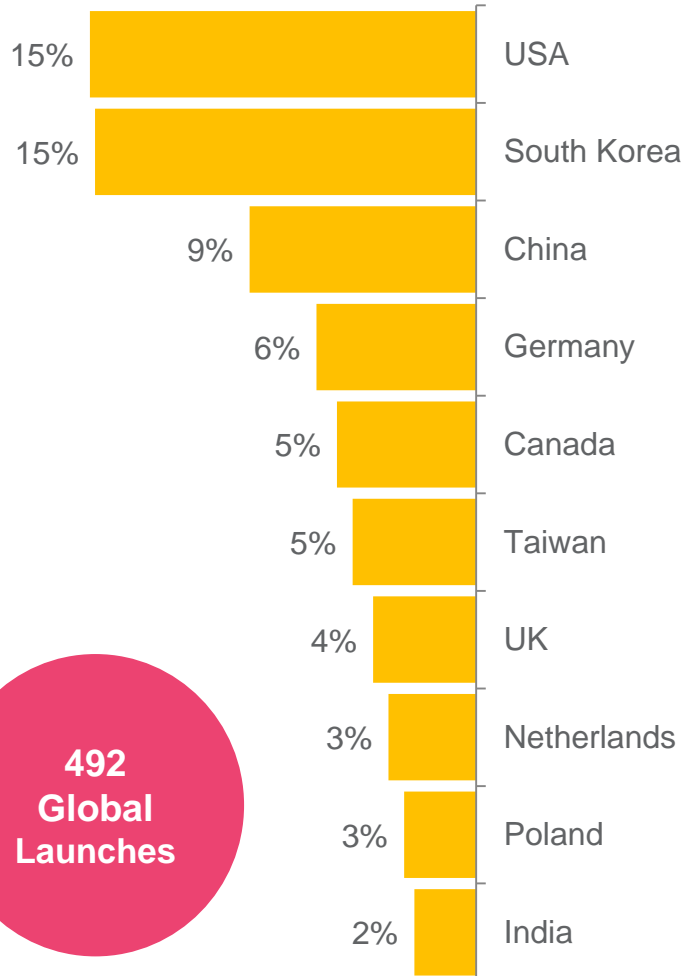


Cabbage Launches

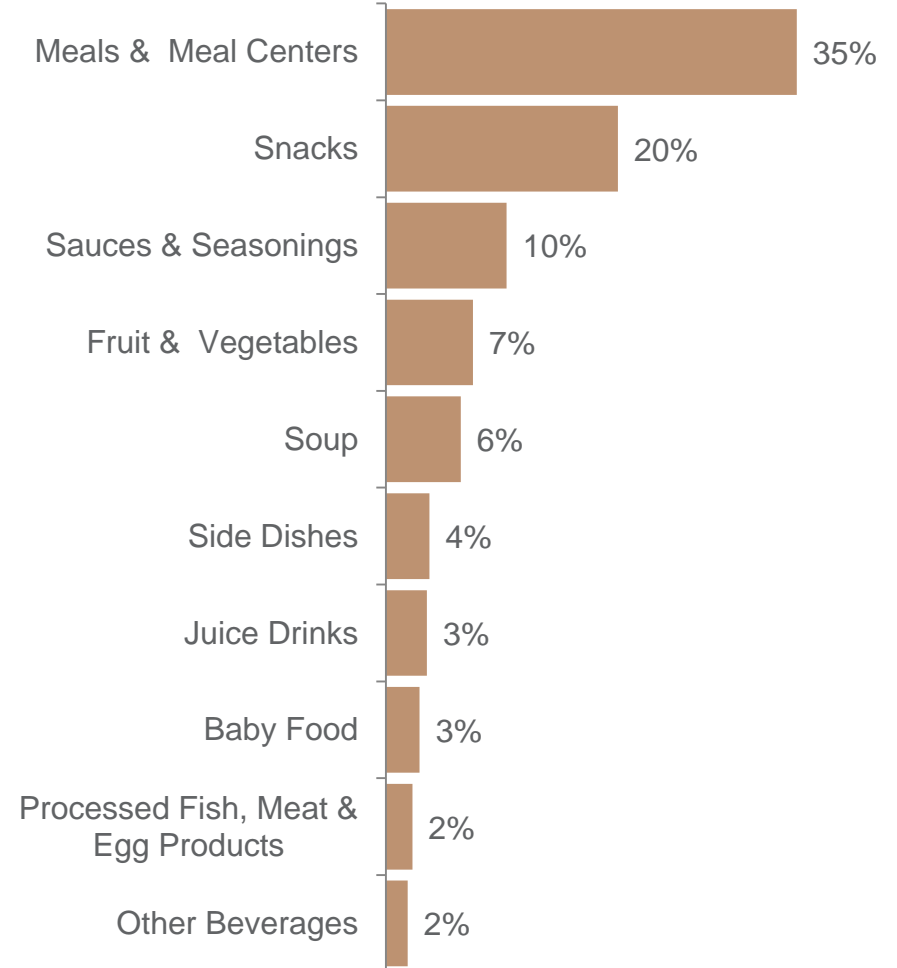
Country & Categories

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

Top 10 Launch Countries



Top 10 Launch Categories












492
Global
Launches












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

Pack Formats Used

Global		Flexible	36%
		Tub	18%
		Tray	13%
Asia Pacific		Flexible	42%
		Tub	15%
		Flexible stand-up pouch	13%
Europe		Tray	26%
		Tub	24%
		Flexible	24%

Top Claims Used

Global		No Additives/Preservatives	28%
		Ease of Use	20%
		Microwaveable	20%
Asia Pacific		No Additives/Preservatives	32%
		Time/Speed	21%
		Ease of Use	18%
Europe		Microwaveable	26%
		No Additives/Preservatives	25%
		Ease of Use	19%

➤➤➤ Innovative Cabbage Launches: L3M (May – August 2016)

Unicarm Stuffed Cabbage Rolls with Pork (Romania)

Unicarm Sarmale (Stuffed Cabbage Rolls with Pork) are now available. This HACCP certified, microwavable and sterilised product retails in a 550g pack.



Claims:
Microwaveable

Chung's Gourmet Quality Sriracha Chili Wrapped White Meat Chicken Egg Rolls (USA)

Chung's Gourmet Quality Sriracha Chili Wrapped White Meat Chicken Egg Rolls are made with all natural chicken. The USDA inspected microwavable product retails in a 22-oz. pack containing eight rolls and sweet and sour sauce packets. The pack features a QR code and the Facebook logo.



Claims:
All Natural Product, Microwaveable, Social Media

Farmhouse Culture Kimchi Gut Shot (Canada)

Farmhouse Culture Kimchi Gut Shot is raw, probiotic, and vegan. It contains the live and active cultures of *L. plantarum* and *L. brevis* that are naturally occurring from raw fermented plant food. It tastes savory and tangy and contains no gluten or GMO. USDA organic certified product retails in a 473ml pack containing 10+ shots.



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

Yamazaki Roasted Tonkatsu Burger (Japan)

Yamazaki Roasted Tonkatsu Burger is now available. This microwavable product is filled with roasted tonkatsu and cabbages seasoned with mayonnaise and sesame dressing, and retails in a single unit pack. Launched on August 1, 2016 RRP not available.



Claims:
Microwaveable

»»» Innovative Cabbage Launches: L3M (May – August 2016)

Peacock Jipbap Yeonguso Cold Acorn Jelly Soup (South Korea)

Peacock Jipbap Yeonguso Cold Acorn Jelly Soup can be simply enjoyed with cool soup. The product contains 35.99% acorn jelly, and retails in a 972g pack, which is sufficient for two servings.



Claims:
Ease of Use

Edeka Deli Asia + Pasta Menu Salad (Germany)

Edeka Deli Asia + Pasta Menü Salat (Asia + Pasta Menu Salad) comprises a pack of chicken-sesame salad with noodles and a separately packed sweet-chili dressing. The product is free of flavour enhancers, ready to take away, warm up or bite, and retails in a 350g pack.



Claims:
No Additives/Preservatives, Ease of Use

First Price Cabbage Bun (Taiwan)

First Price Cabbage Bun is made with non-bleached flour and is free from preservatives and animal lard. The microwavable product is suitable for vegans and retails in a 650g pack, containing 10 units.



Claims:
No Additives/Preservatives, Microwaveable, Economy, Ethical - Environmentally Friendly Product, Vegan, No Animal Ingredients

Morinaga Hi-Chew Grape Ice Cream (Japan)

Morinaga Hi-Chew Grape Ice Cream is only available at Lawson. This product with 5% fruit juice retails in a 120ml pack. Launched in July 2016 with an RRP of 140 yen.



Claims:
N/A

»»» Innovative Cabbage Launches: L3M (May – August 2016)

Migain Whole Household Pot of Spicy Sausage Stew (South Korea)

Migain Whole Household Pot of Spicy Sausage Stew is now available. The product retails in a 1050g pack.



Claims:
N/A

Bâton Rouge Original Creamy Coleslaw (Canada)

Bâton Rouge Original Creamy Coleslaw has been reformulated. The product is said to be perfect with steak, grilled meats, ribs or garnished with pulled pork for an ideal sandwich. The coleslaw retails in a recyclable 454g pack.



Claims:
Ethical - Environmentally Friendly Package

Tesco Cabbage, Broad Beans & Runner Beans (UK)

Tesco Cabbage, Broad Beans & Runner Beans are described as savoy cabbage, broad beans and runner beans in a herb dressing. The microwavable and vegetarian product contains no artificial preservatives, flavours or colours. These vegetables retail in a 250g partly recyclable pack featuring heating instructions.



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

Delicasia Okonomiyaki with Squid and Crab Stick (Thailand)

Delicasia Okonomiyaki with Squid and Crab Stick is now available. This microwaveable product is available only at 7-Eleven stores and retails in an 115g pack containing one 105g unit and a 10g dip.



Claims:
Microwaveable



Australian Cabbage Launches: L3M (May – August 2016)

Australian Eatwell Tomato, Onion & Basil Vegetable Sausages

Australian Eatwell Tomato, Onion & Basil Vegetable Sausages have been repackaged in a newly designed pack. This 100% vegan product is free from cholesterol and GMO, and retails in a 320g easy peel pack containing eight sausages and featuring a Facebook link.



Claims:
Low/No/Reduced Cholesterol, Vegan, Convenient Packaging, No Animal Ingredients, GMO-Free, Social Media

Good Mood Food Fresh Chicken Vietnamese Spring Rolls

Good Mood Food Fresh Chicken Vietnamese Spring Rolls are now available. The gluten-free product has no preservatives, artificial colours or flavourings. These spring rolls, made by hand from locally sourced ingredients, retail in a 200g pack, containing four units.



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

Massel Salt Reduced Vegetable Stock Cubes

The natural product contains no trans fat, animal content, added MSG, preservatives, lactose, gluten or cholesterol. The great taste is said to be derived solely from natural vegetable ingredients combined with marine salt sourced from the Great Southern Ocean. The product is said to be strong in flavour and is recommended to be used in stir fries, casseroles, rice, pasta, lentils and vegetables.



Claims:
No Additives/Preservatives, Low/No/Reduced Cholesterol, Low/No/Reduced Sodium, Gluten-Free, Low/No/Reduced Transfat, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Product, Vegan, No Animal Ingredients, Low/No/Reduced Lactose

Campbell's Real Soup Base Malaysian Soup Base

Campbell's Real Soup Base Malaysian Soup Base is a chicken stock infused with lemongrass, galangal, turmeric and chilli. It just needs the addition of coconut milk, chicken breast, Singapore noodles and bean sprouts. It is 100% natural, 99% fat-free and free from added preservatives. The product retails in a 1L pack that features recipe suggestions.



Claims:
No Additives/Preservatives, All Natural Product, Low/No/Reduced Fat, Ease of Use



Celery.





Purchase and consumption have both increased this wave.

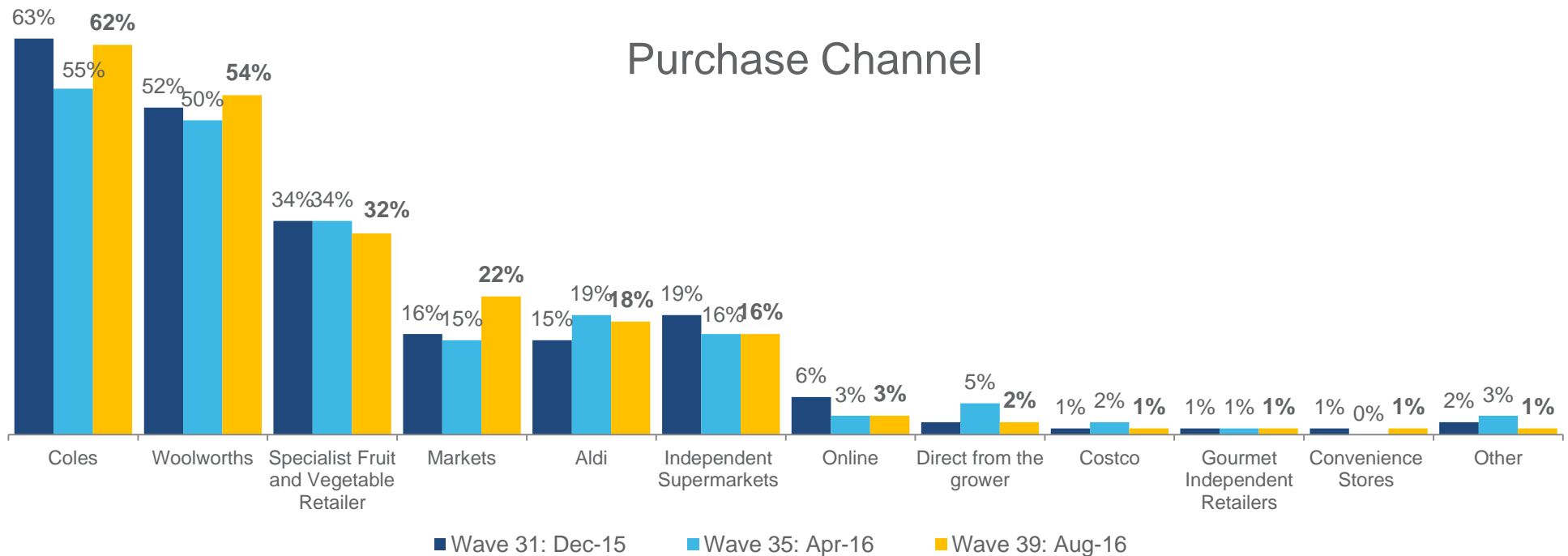


Coles is the key retail channel for celery purchase. There has been a noticeable increase in purchase from markets this wave.



▼ 3.1 times, Wave 31
▼ 2.9 times, Wave 35

▲ 9.9 times, Wave 31
▼ 8.9 times, Wave 35



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 31 N=307, Wave 35 N=310, Wave 39 N=304



Average Spend and Price Sensitivity



Average weight of purchase

The average consumer typically purchases **800g** of celery, which is consistent with Wave 35.

- ▲ 900g, Wave 31
- 800g, Wave 35



Recalled last spend

The average recalled last spend on celery was **\$2.90**, which has slightly inclined over the last three waves.

- ▼ \$2.70, Wave 31
- ▼ \$2.80, Wave 35



Value for money

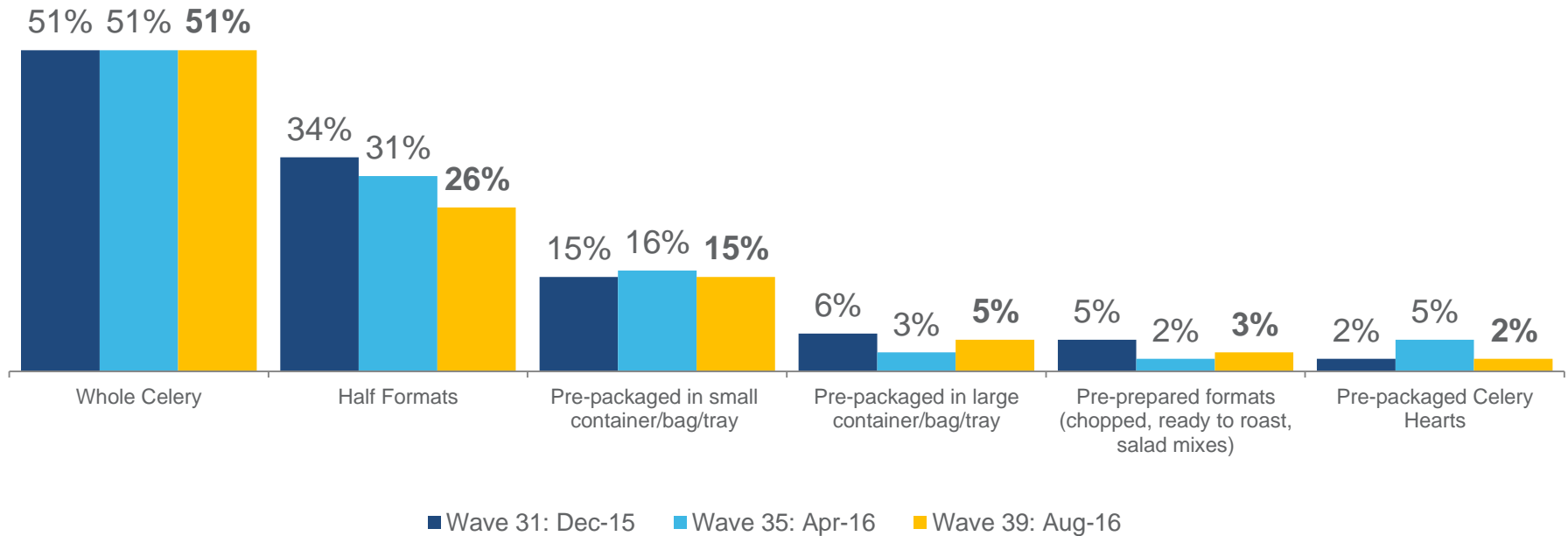
On average, consumers perceive celery to be good value for money (**6.4/10**), which has declined this wave.

- ▲ 6.5/10, Wave 31
- ▲ 6.7/10, Wave 35

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 31 N=307, Wave 35 N=310, Wave 39 N=304



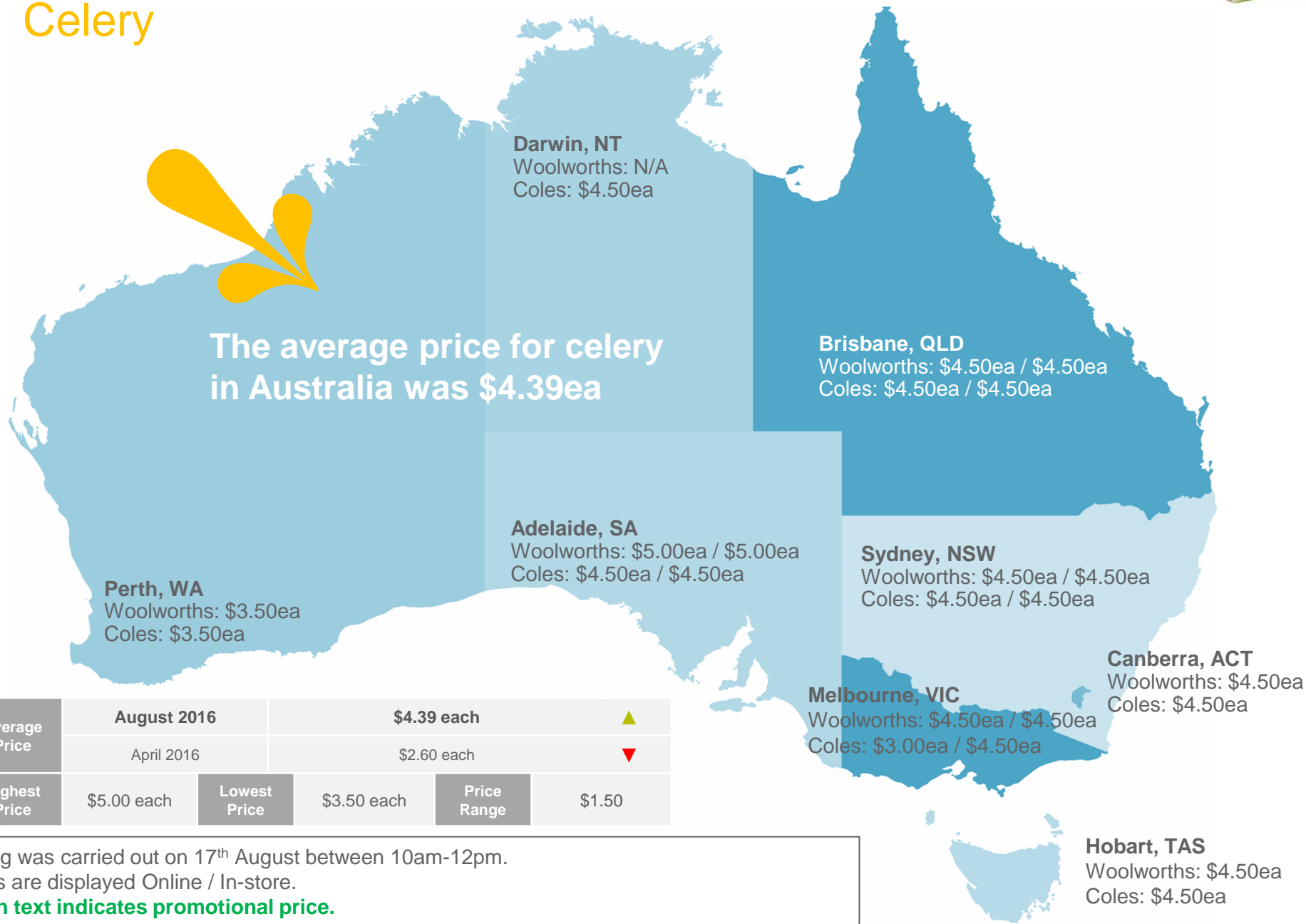
Over half of consumers purchase whole celery formats. Half and pre-packaged options are also popular formats.



Q4b In what fresh formats do you typically purchase Celery?
Sample Wave 31 N=307, Wave 35 N=310, Wave 39 N=304

Online and In-store Commodity Prices

Celery



Average Price	August 2016	\$4.39 each		▲	
	April 2016	\$2.60 each		▼	
Highest Price	\$5.00 each	Lowest Price	\$3.50 each	Price Range	\$1.50

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



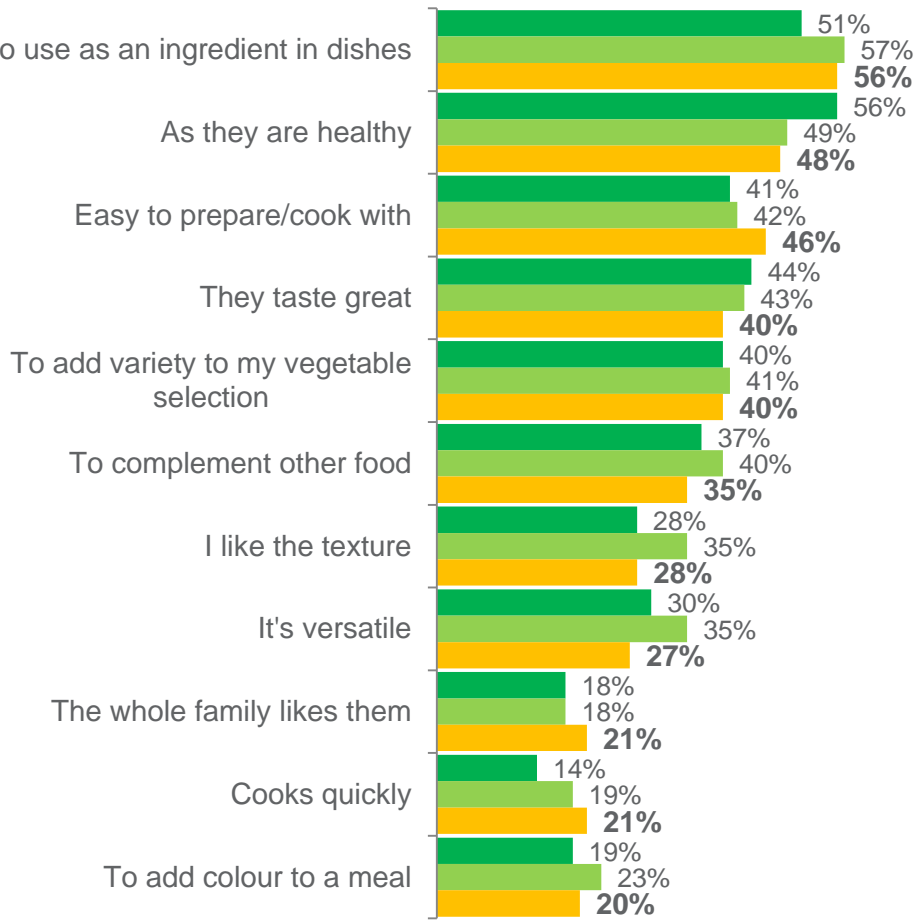
Spontaneous awareness of celery varieties remains very low, with 80% of consumers unable to recall a type.





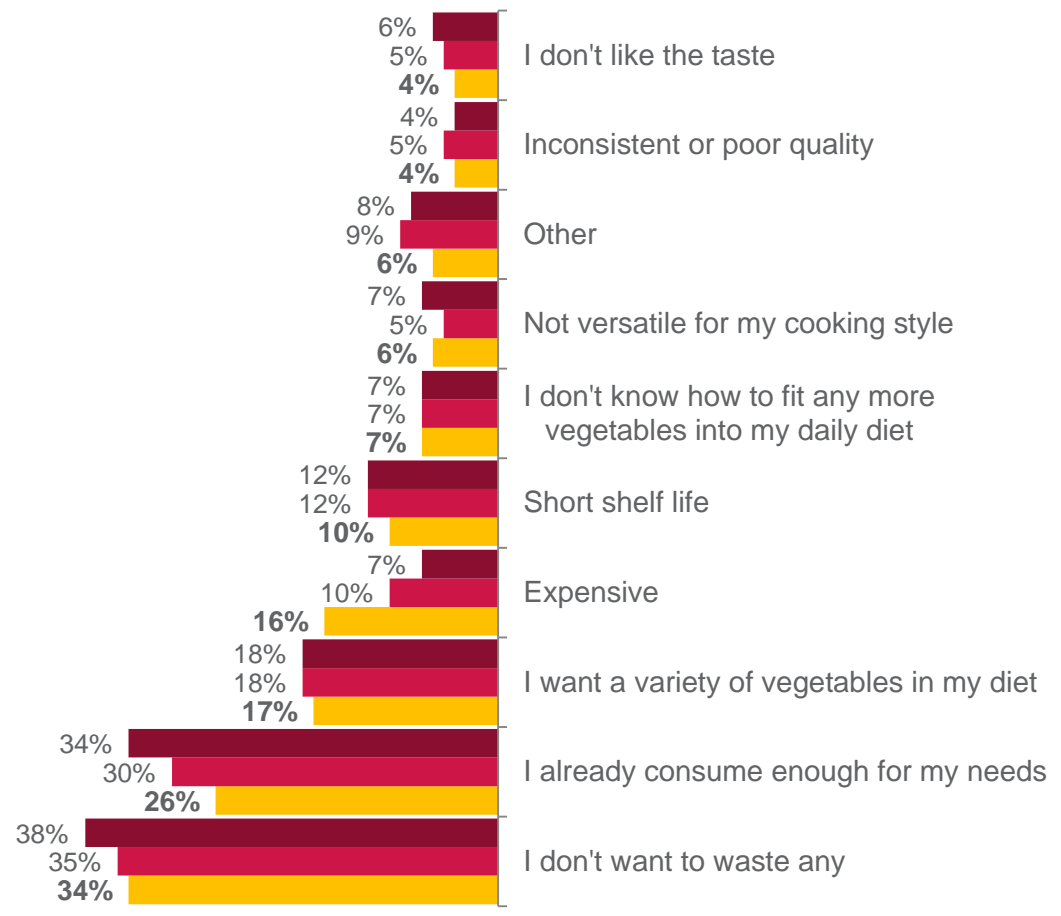
Use as an ingredient, health and ease of preparation are the key triggers of purchase. In contrast, not wanting to waste any and already consuming enough are the barriers preventing future purchase.

Triggers



■ Wave 31: Dec-15 ■ Wave 35: Apr-16 ■ Wave 39: Aug-16

Barriers



■ Wave 31: Dec-15 ■ Wave 35: Apr-16 ■ Wave 39: Aug-16

Q7. Which of the following reasons best describes why you purchase <commodity> ?
Q8. Which reason best describes why you don't buy <commodity> more often?
Sample Wave 31 N=307, Wave 35 N=310, Wave 39 N=304



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

Dinner remains the predominant occasions for celery consumption.

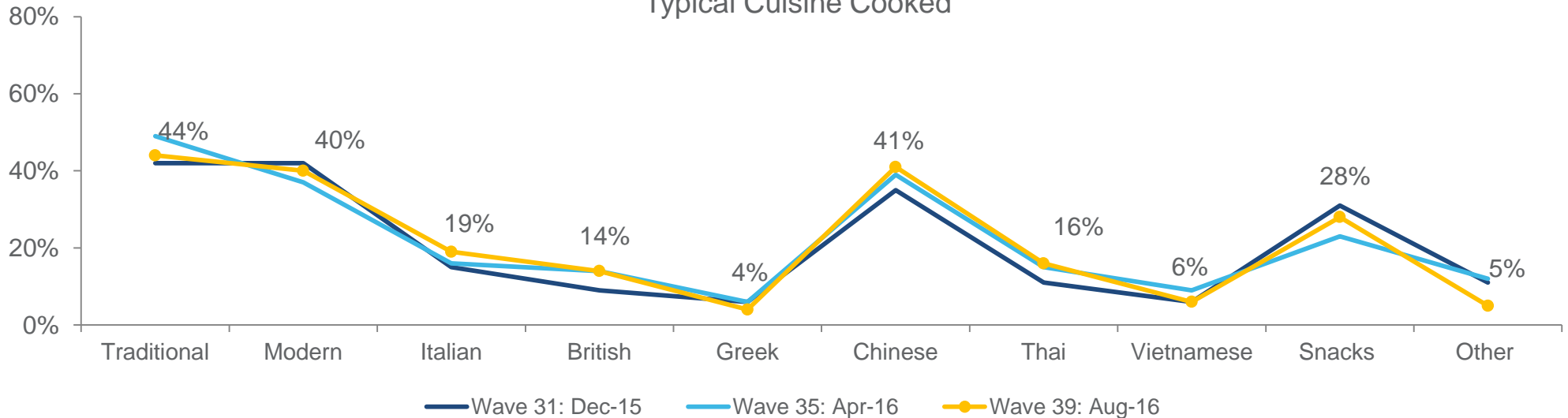
Top 5 Consumption Occasions

	Wave 35	Wave 39
Dinner	62%	59%
Family meals	53%	49%
Weekday meals	46%	47%
Quick Meals	41%	38%
Weekend meals	43%	38%

15% used celery when cooking a new recipe

▼ 12%, Wave 35

Typical Cuisine Cooked



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



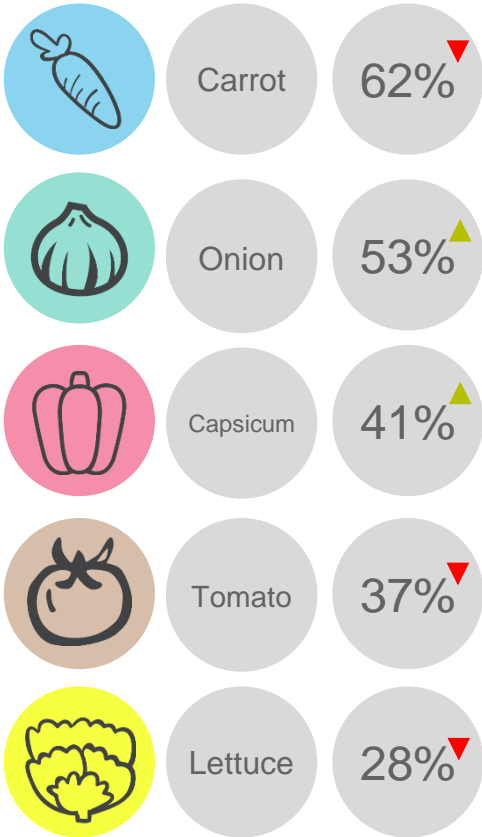
▼ : Indicates LOWER score than current wave.
▲ : Indicates HIGHER score than current wave.

Q10. What cuisines do you cook/consume that use <commodity> ?
Q11. Which of the following occasions do you typically consume/use <commodity> ?
Sample Wave 31 N=307, Wave 35 N=310, Wave 39 N=304



Carrot, onion and capsicum are typically served with celery. Celery is more likely to be consumed raw, stir fried or cooked in soups. There has been an increase in slow cooking over the last three waves.

Accompanying Vegetables



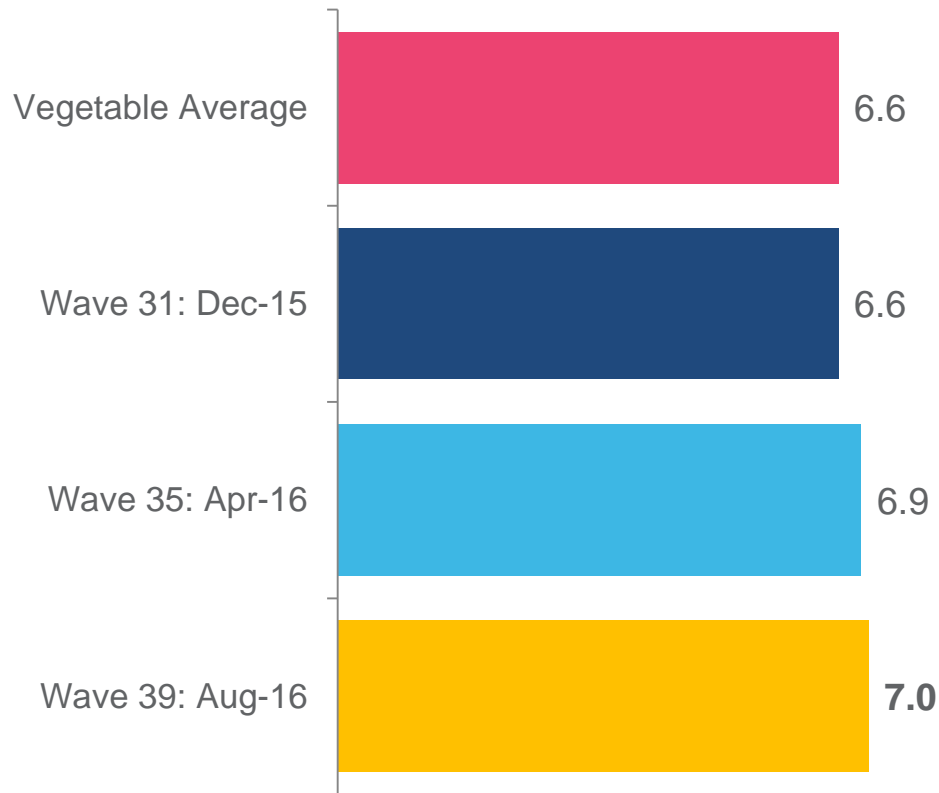
Top Cooking Styles

	Wave 31	Wave 35	Wave 39
Raw	70%	60%	58%
Stir frying	47%	54%	53%
Soup	39%	53%	51%
Slow Cooking	16%	28%	29%
Sautéing	10%	15%	15%
Frying	6%	7%	12%
Boiling	7%	9%	10%
Steaming	7%	10%	9%
Microwave	4%	3%	5%
Baking	3%	4%	4%

Q9. How do you typically cook <commodity> ?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
Sample Wave 31 N=307, Wave 35 N=310, Wave 39 N=304



The importance of celery provenance has increased over the last three waves. Provenance information continues to be key to consumers, especially celery grown in Australia.



Q14. When purchasing <commodity>, how important is Provenance to you?
Q15. And when purchasing Celery, how important is that it is grown in Australia?
Sample Wave 31 N=307, Wave 35 N=310, Wave 39 N=304



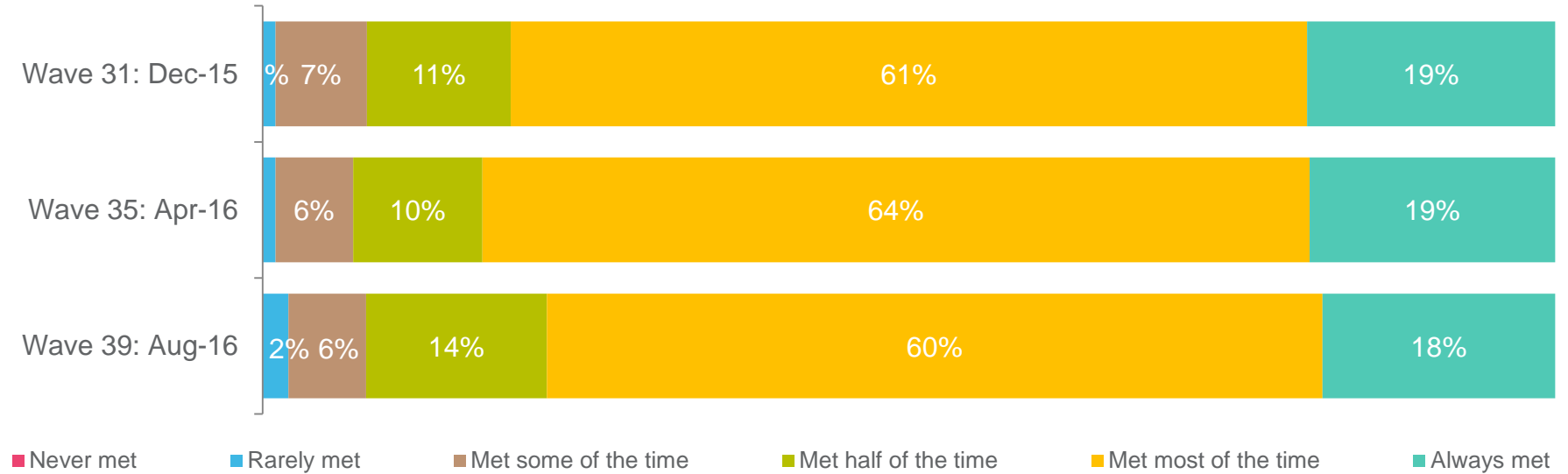
Celery is expected to remain fresh for ten days after purchase, relatively consistent with previous waves.

The likelihood of freshness expectations being met has remained stable.

Expected to stay fresh for **10.2 days**

- ▼ 9.8 days, Wave 31
- ▲ 10.4 days, Wave 35

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 31 N=307, Wave 35 N=310, Wave 39 N=304



Trends: Celery



Celery Global NPDs

May – August 2016

There were 1214 products containing celery launches in the past three months. Launches primarily occurred in Europe. USA and Germany were the most popular launch countries. Categories for launch were meals, sauces and processed products.





Celery Product Launches: Last 3 Months (May – August 2016) Summary

- Consistent with previous trends, a large number of products (N=1214) containing celery as an ingredient were launched globally in the last three months.
- There were 28 products launched in Australia, slightly higher than the previous wave.
- The majority of launches occurred in Europe (50%). Key countries for launch were USA and Germany.
- Flexible packaging (19%) and trays (17%) were the main packaging types used for products.
- Meals (22%), sauces and seasoning (20%), and processed products (18%) were the main categories for launches.
- Core claims used were no additives or preservatives (30%) and microwavable (28%).
- The most innovative product launch this wave was an Organic Celery Salad from Portugal. Examples of other innovative launches can be found on the following pages.



Source: Mintel (2016)

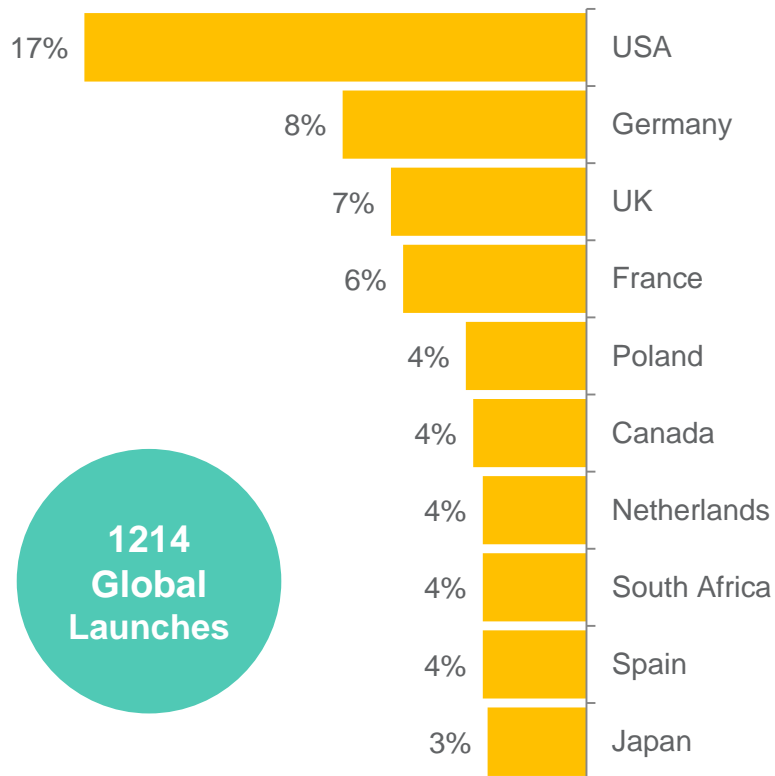




Celery Launches

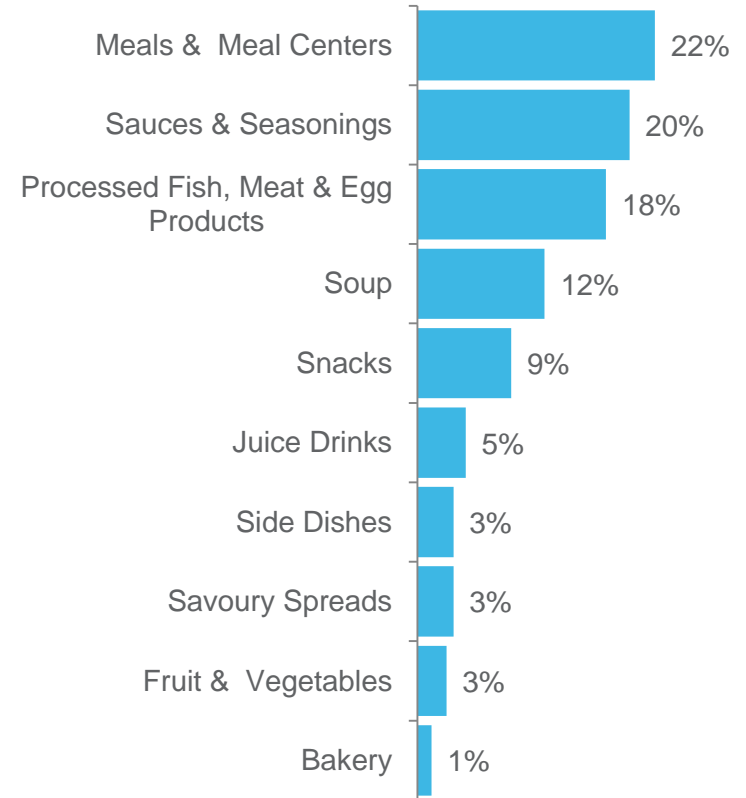
- ➔ USA and Germany continue to produce the greatest number of products containing celery.
- ➔ Meals, sauces & seasonings, processed products and soups are the main categories for products launched.

Top Launch Countries



1214
Global
Launches










Top Launch Categories














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

Pack Formats Used

Global		Flexible	19%
		Tray	17%
		Tub	10%
Europe		Tray	25%
		Flexible	16%
		Jar	12%
North America		Flexible	17%
		Skinpack	17%
		Tub	11%

Top Claims Used

Global		No Additives/Preservatives	30%
		Microwaveable	28%
		Low/No/Reduced Allergen	19%
Europe		No Additives/Preservatives	28%
		Microwaveable	26%
		Ethical - Environmentally Friendly Package	19%
North America		Low/No/Reduced Allergen	37%
		Gluten-Free	35%
		No Additives/Preservatives	34%



Innovative Celery Launches: L3M (May – August 2016)

Dole Mini Celery Sticks (Chile)

Dole Mini Varitas de Apio (Mini Celery Sticks) have been repackaged. According to the manufacturer, celery is low in calories and high in vitamin K. The ready to eat product is retailed in a 400g pack featuring the Facebook and Twitter logos.



Claims:
Low/No/Reduced Calorie, Ease of Use, Social Media

Simply Nature Herbs & Spices Popcorn (USA)

Simply Nature Herbs & Spices Popcorn has been added to the range. The kosher certified product contains 19g whole grain, and is free from gluten, GMO, trans fat, artificial ingredients, preservatives and lactose. It retails in a 5-oz. pack.



Claims:
No Additives/Preservatives, Kosher, Gluten-Free, Low/No/Reduced Transfat, Wholegrain, Low/No/Reduced Allergen, Low/No/Reduced Lactose, GMO-Free

Pacific Pickle Works Bloody Mary Elixir (USA)

Pacific Pickle Works Bloody Mary Elixir is a spicy additive for making the perfect Bloody Mary cocktail. It just requires the addition of tomato juice to prepare and features all natural Worcestershire sauce. This all natural and hand packed elixir contains no artificial colors, flavors or preservatives and can also make a great steak sauce or marinade. The product retails in an 8-fl. oz. pack, which is enough to make 2-qts. of drink.



Claims:
No Additives/Preservatives, All Natural Product, Ease of Use

M&M Meat Shops Chicken Quesadillas (Canada)

M&M Meat Shops Chicken Quesadillas have been repackaged in a newly designed pack. The product consists of flour tortillas filled with diced cooked seasoned chicken breast, shredded mozzarella and Monterey Jack cheeses, green and red bell peppers and onions, all in an exclusive creamy jalapeno pepper sauce. The microwavable product retails in a 500g pack containing four units.



Claims:
Microwaveable



Innovative Celery Launches: L3M (May – August 2016)

Toppo Potato Dumplings Filled with Smoked Meat (Czech Republic)

Toppo Bramborové Knedlíky s Uzeným Masem (Potato Dumplings Filled with Smoked Meat) contain 22% smoked meat and a bacon filling. The product can be prepared in 15 minutes and retails in a 680g family pack.



Claims:
N/A

GutBio Organic Celery Salad (Portugal)

GutBio Salada de Aipo Orgânico (Organic Celery Salad) is now available. The product is organic certified, and retails in a 320g pack featuring the EU Green Leaf logo.



Claims:
Organic

Synear Guan Tang Shui Jiao Clyster Dumplings with Pork and Celery (China)

Synear Guan Tang Shui Jiao Zhu Rou Qin Cai Shui Jiao (Clyster Dumplings with Pork and Celery) feature top grade mellow and tasty big bone broth, and are stuffed with quality fillings. The dumplings are said to be mellow, aromatic and nutritious. This product retails in a 500g pack.



Claims:
N/A

Rakuou Nyugyo Green Smoothie (Japan)

Rakuou Nyugyo Green Smoothie is now available in FamilyMart stores. The low calorie product is made with nine domestic vegetables and three fruits, and contains 118g vegetables. It retails in a 200g pack. Launched on July 12, 2016 with an RRP of 178 yen.



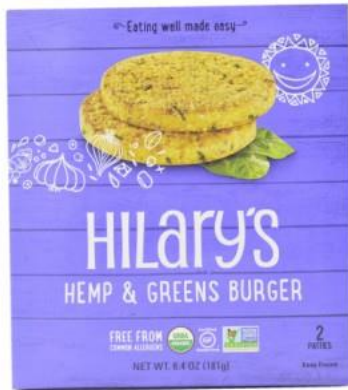
Claims:
Low/No/Reduced Calorie



Innovative Celery Launches: L3M (May – August 2016)

Hilary's Hemp & Greens Veggie Burger (USA)

Hilary's Hemp & Greens Veggie Burger has been relaunched with a new brand name, having formerly been known as Hilary's Eat Well. The product is said to be convenient, gluten-free, non-GMO, vegan, kosher and USDA organic certified. It is free from common allergens, like corn, dairy, egg, soy and nut and is made with solar power.



Claims:

Kosher, Organic, Gluten-Free, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Ethical - Human, Vegan, Ease of Use, No Animal Ingredients, GMO-Free, Social Media

Sonoma Flatbreads Uncured Pepperoni Flatbread (USA)

Sonoma Flatbreads Uncured Pepperoni Flatbread has been repackaged and is now available in a 12.02-oz. recyclable pack featuring the Facebook logo. The light and crispy multi-grain NatureCrust is topped with premium organic ingredients, including an uncured pepperoni, aged provolone and cause. It contains no artificial flavors, colors, nitrites, nitrates, preservatives or GMOs.



Claims:

No Additives/Preservatives, Organic, Premium, Ethical - Environmentally Friendly Package, GMO-Free, Social Media

Quaker Lentil Soup with Oats (Saudi Arabia)

Quaker Lentil Soup with Oats is said to be an ideal soup for all occasions and can be enjoyed as an after-school snack, an appetizer for the family before lunch, as a substitute for a light dinner or a base for a favourite recipe. It is said that its goodness and texture make it essential for creating delicious soups that the whole family can enjoy. This ready-to-cook product is free from MSG, preservatives and artificial colours, and retails in a 63g pack that serves two portions.



Claims:

No Additives/Preservatives, Ease of Use

Chef n' Boss Royal Masala Chutney (Brazil)

Chef n' Boss Chutney de Aipo, Cebola e Especiarias Indianas (Royal Masala Chutney) is said to feature creative flavours. The product is gluten-free, suitable for roasts, breads, cheeses and more, and retails in a 160ml pack featuring the Facebook, and Instagram logos.



Claims:

Gluten-Free, Low/No/Reduced Allergen, Social Media



Australian Celery Launches: L3M (May – August 2016)

**Weight Watchers Gourmet Menu
Mango Coconut Chicken**



**Lean Cuisine Whole Grains Spanish
Chicken Chorizo with Brown & Wild
Rice**



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



**Campbell's Simply Soup Healthy
Greens with Kale Soup**

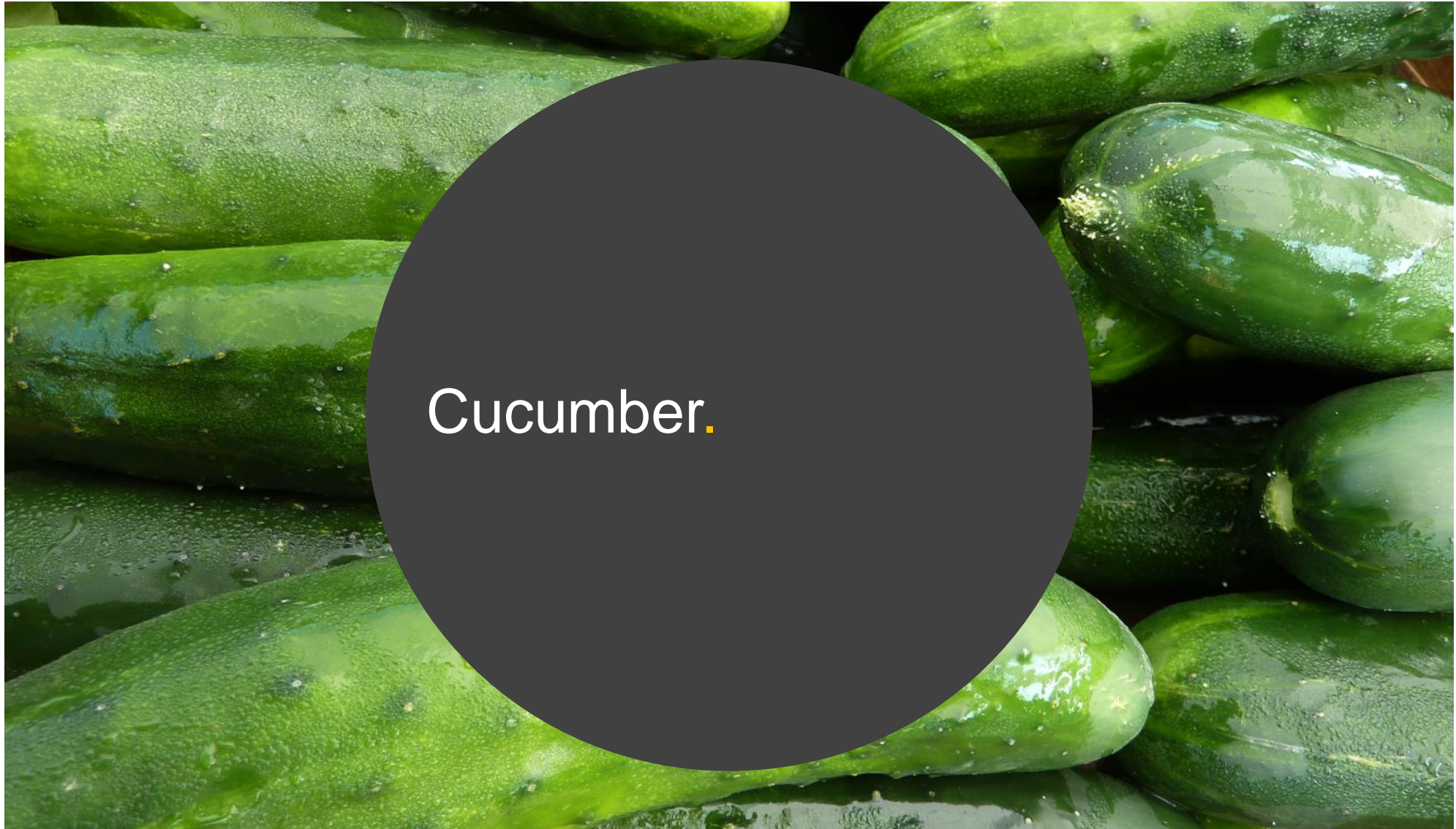


**Four'N Twenty Super Chunky Steak &
Veg Pies**



**The Real Homestyle Soup Aussie
Angus Beef & Ale Soup**





Cucumber.



➔ Cucumber purchase has increased this wave, whilst consumption is stable. On average, cucumbers are eaten three times per week.

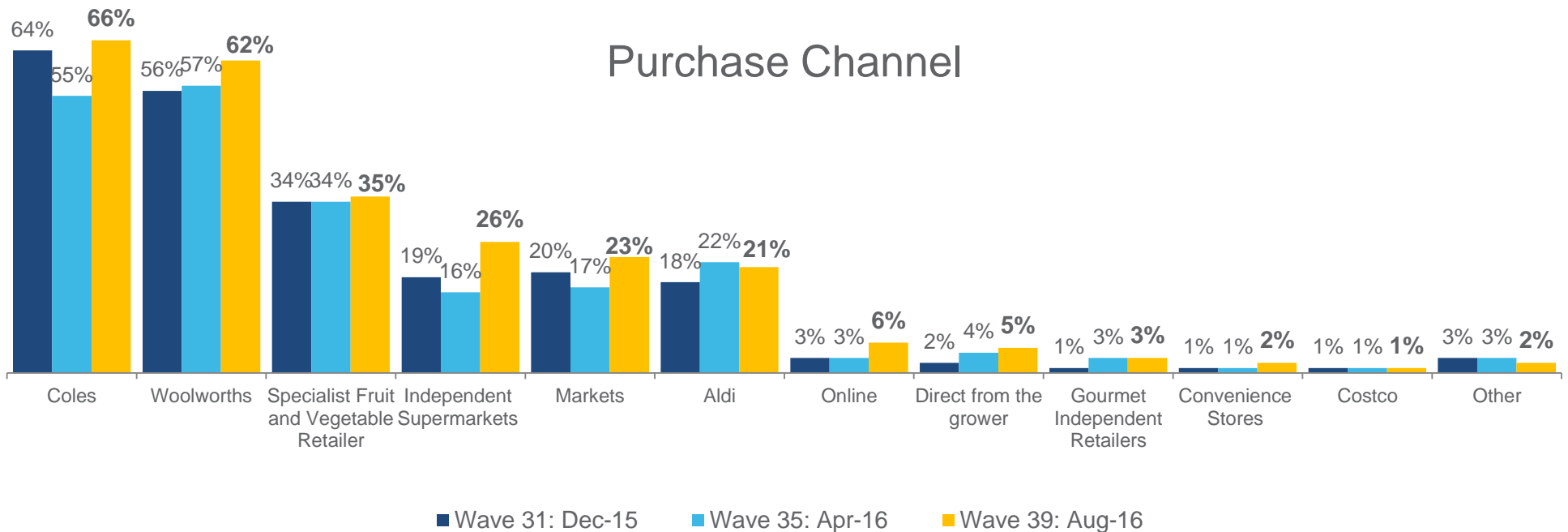
Key channels for purchase are mainstream retailers. There has been a noticeable increase in purchase from independent supermarkets this wave.



▼ 4.3 times, Wave 31
▼ 4.1 times, Wave 35

▲ 12.3 times, Wave 31
■ 12.0 times, Wave 35

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 31 N=306, Wave 35 N=310, Wave 39 N=303



Average Spend and Price Sensitivity



Average weight of purchase

The average consumer typically purchases **700g** of cucumber, consistent with the previous wave.

- ▼ 600g, Wave 31
- 700g, Wave 35



Recalled last spend

The average recalled last spend is **\$3.00**, which has increased over the last three waves.

- ▼ \$2.60, Wave 31
- ▼ \$2.80, Wave 35



Value for money

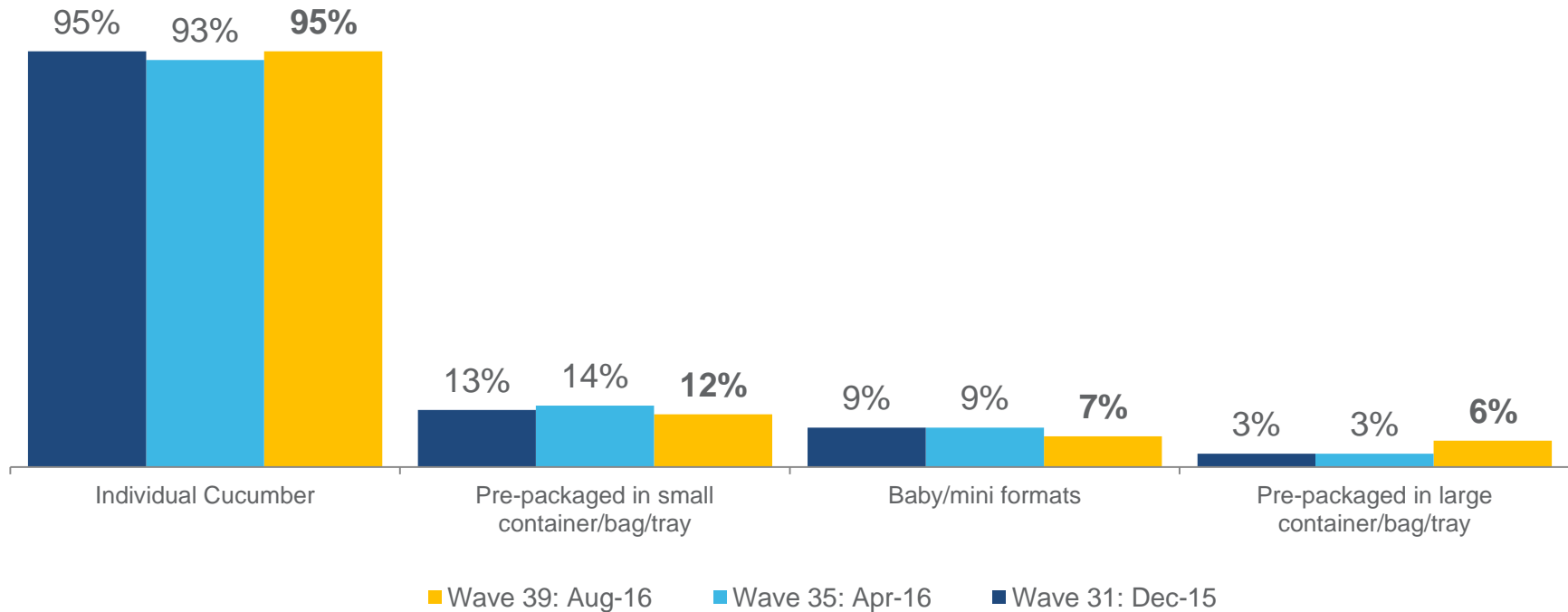
On average, consumers perceive cucumber to be good value for money (**6.4/10**), returning to the level found in Wave 31.

- 6.4/10, Wave 31
- ▲ 6.6/10, Wave 35

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 31 N=306, Wave 35 N=310, Wave 39 N=303



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

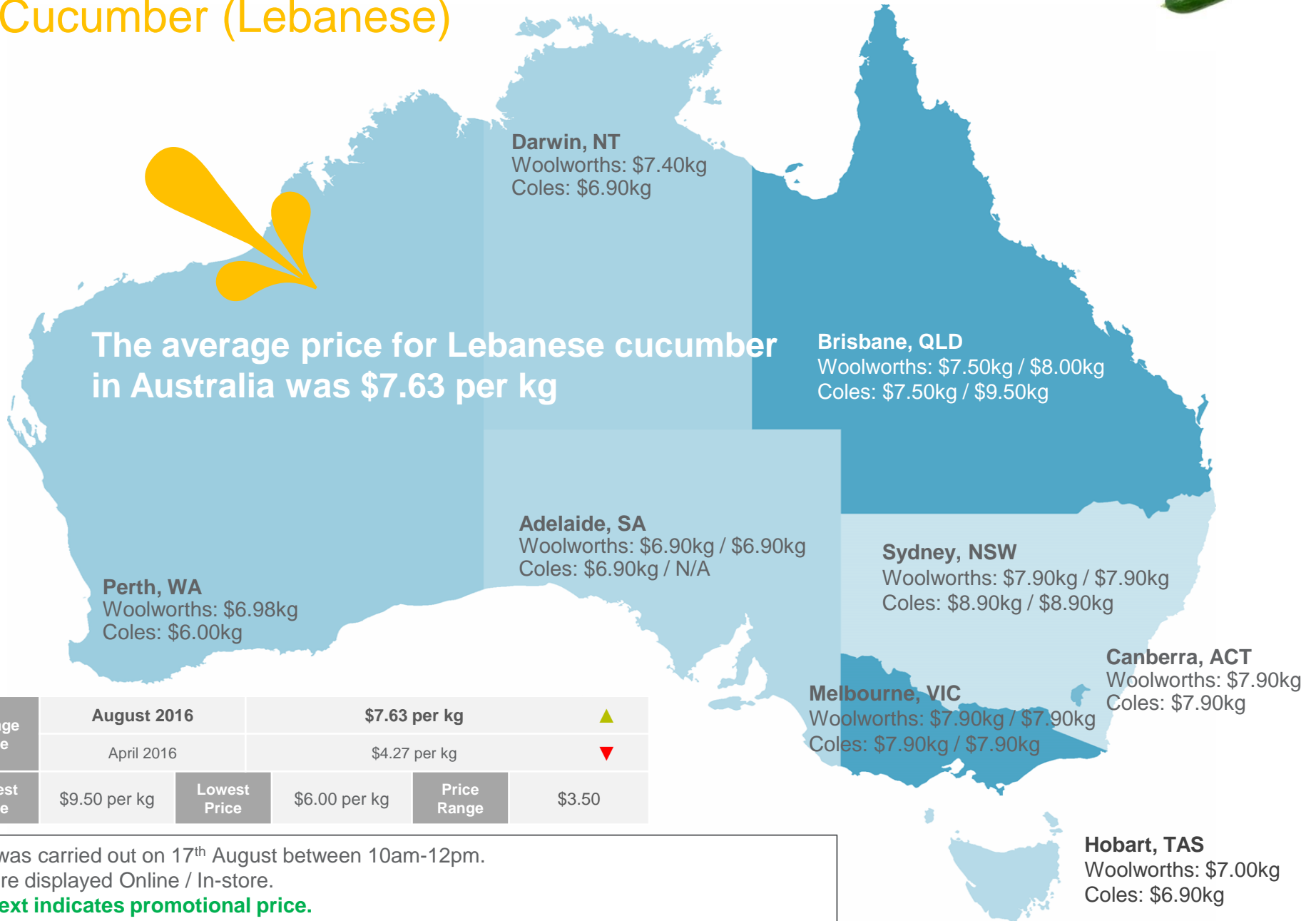


Q4b In what fresh formats do you typically purchase Cucumber?
Sample Wave 31 N=306, Wave 35 N=310, Wave 39 N=303

Online and In-store Commodity Prices



Cucumber (Lebanese)

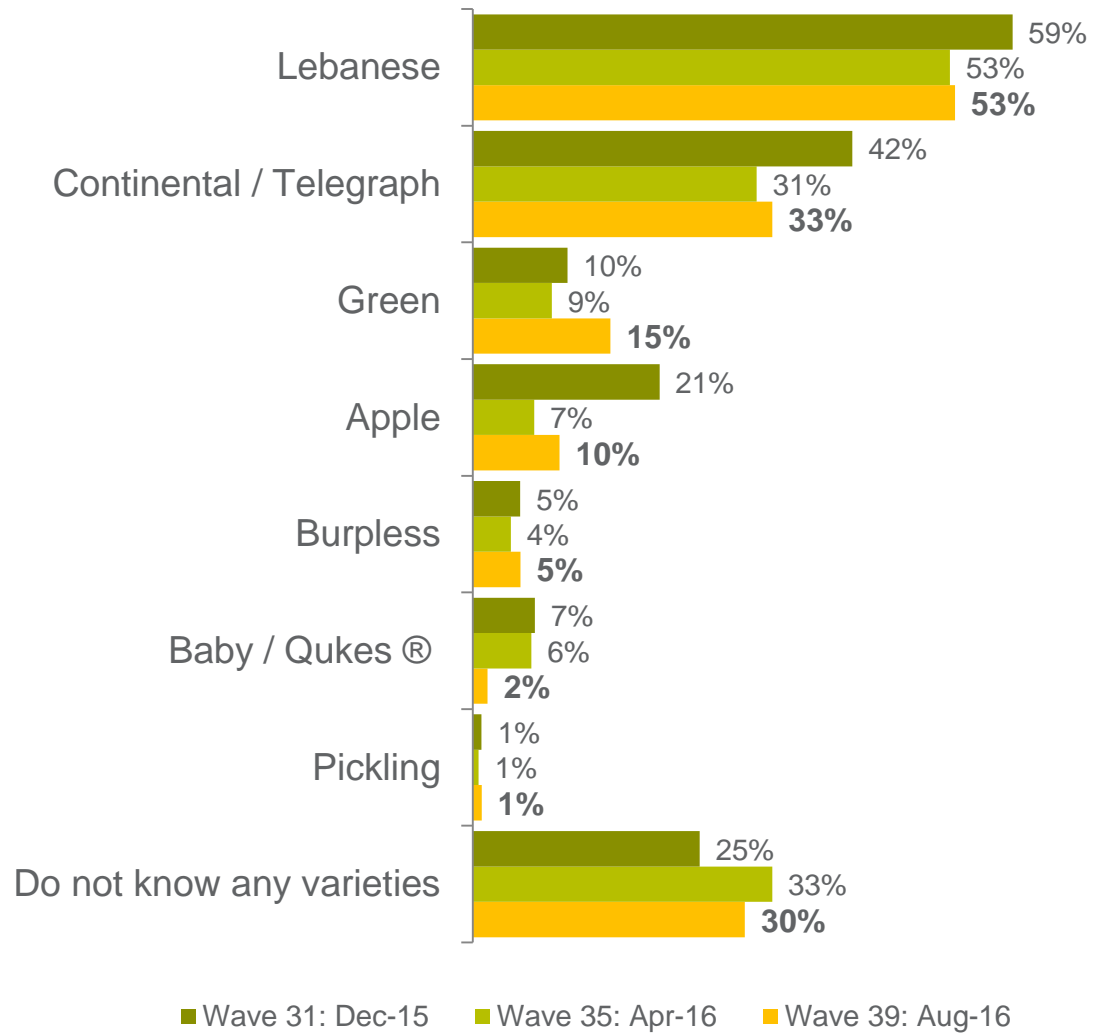


Average Price	August 2016	\$7.63 per kg ▲			
	April 2016	\$4.27 per kg ▼			
Highest Price	\$9.50 per kg	Lowest Price	\$6.00 per kg	Price Range	\$3.50

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



Spontaneous awareness of cucumbers was relatively consistent with the previous wave. Lebanese and Continental/Telegraph were the most recalled types.



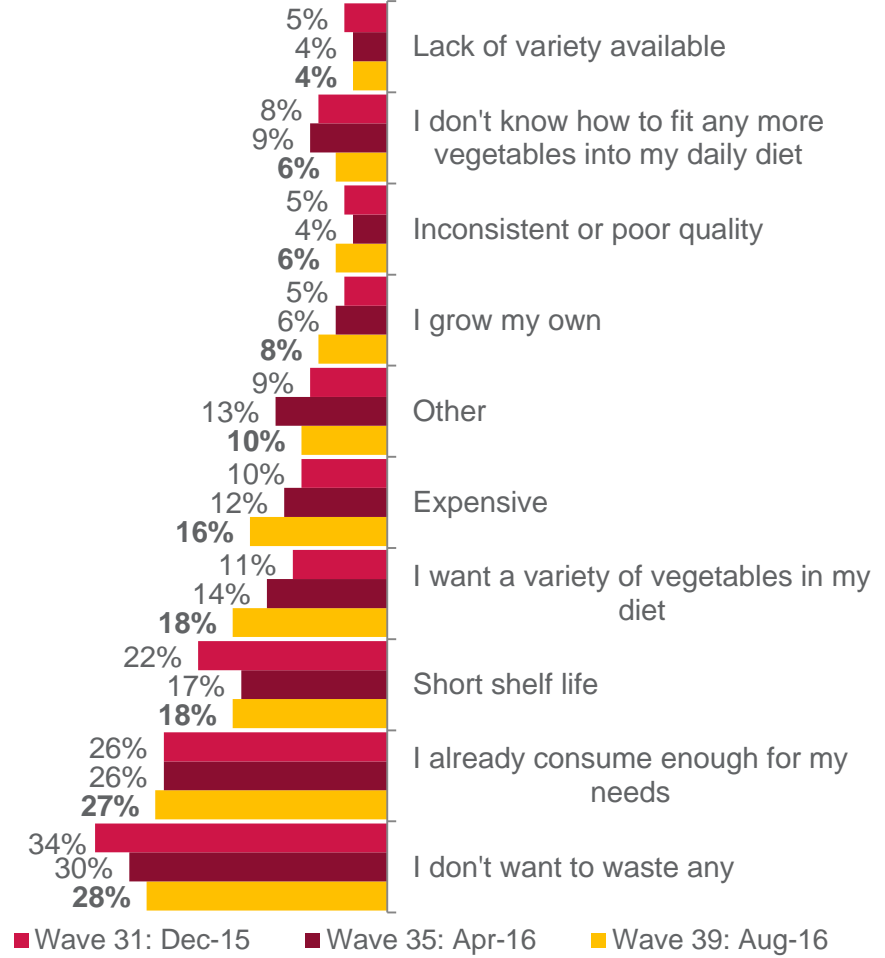
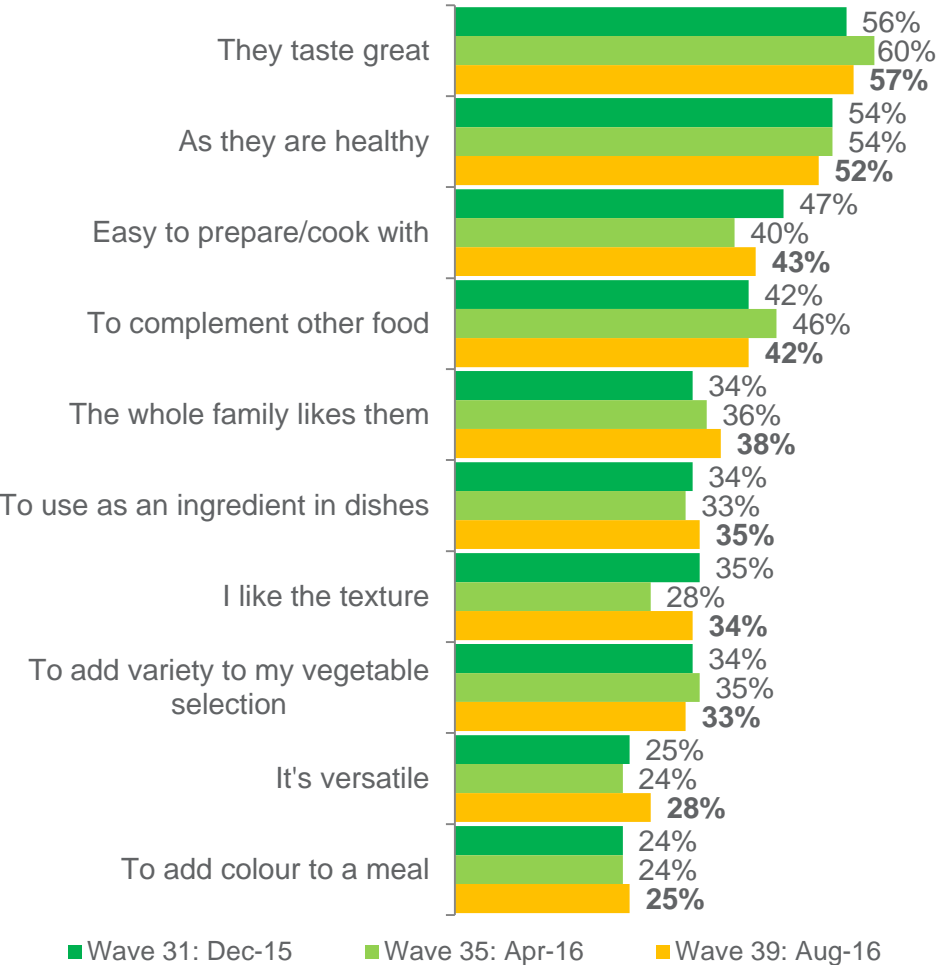
Q6a. What types/varieties of <commodity> are you aware of? (unprompted)
 Sample Wave 31 N=306, Wave 35 N=310, Wave 39 N=303



Taste and health remain the key triggers to cucumber purchase. Not wanting to waste any has trended downwards over the last three waves, yet remains the main barrier to future purchase.

Triggers

Barriers



Q7. Which of the following reasons best describes why you purchase <commodity> ?
Q8. Which reason best describes why you don't buy <commodity> more often?
Sample Wave 31 N=306, Wave 35 N=310, Wave 39 N=303



Lunch and dinner are the main meal occasions for cucumber consumption.

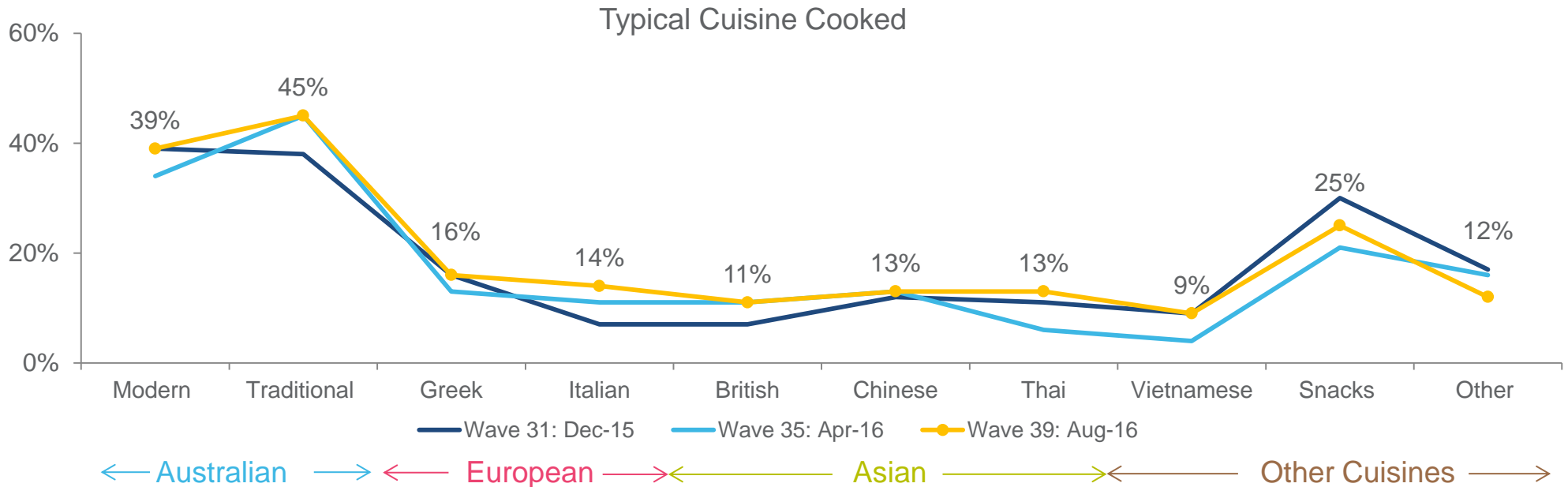
There are limited cuisine styles currently being cooked using cucumber. Australian and snacks are most popular with consumers.

Top 5 Consumption Occasions

	Wave 35	Wave 39
Lunch	57%	61%
Dinner	58%	58%
Family meals	46%	48%
Quick Meals	47%	46%
Weekday meals	40%	44%

9%
used cucumber when cooking a new recipe

▼ 7%, Wave 35



Q10. What cuisines do you cook/consume that use <commodity> ?
 Q11. Which of the following occasions do you typically consume/use <commodity> ?
 Sample Wave 31 N=306, Wave 35 N=310, Wave 39 N=303

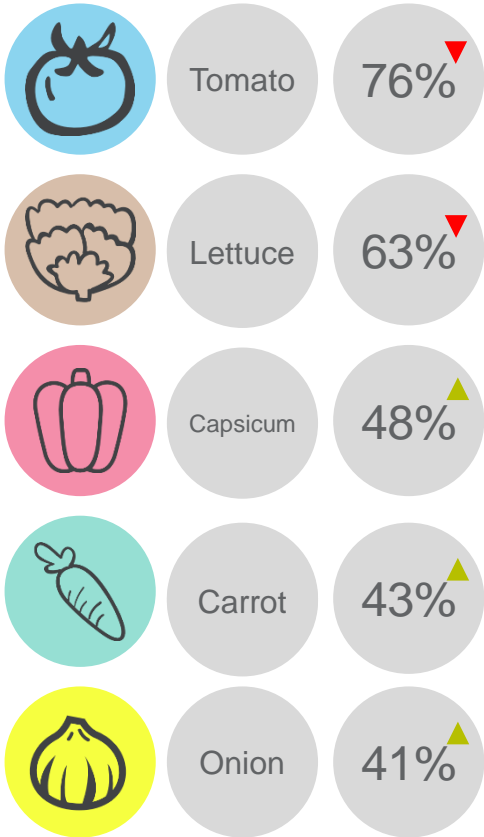


▼ : Indicates LOWER score than current wave.
 ▲ : Indicates HIGHER score than current wave.



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

Accompanying Vegetables



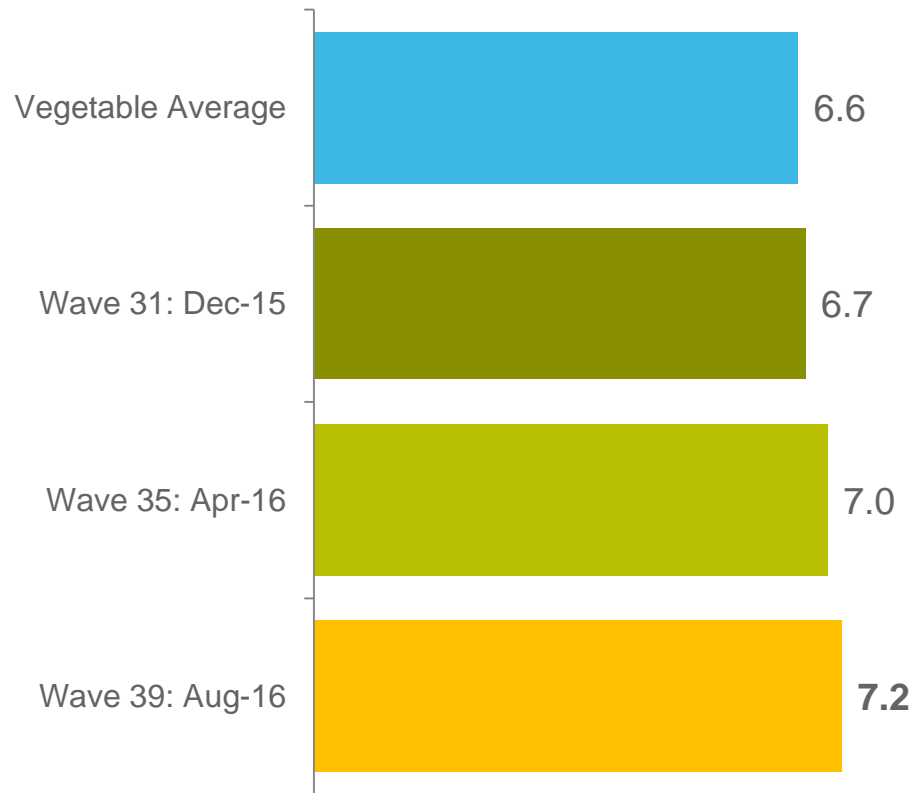
Top Cooking Styles

	Wave 31	Wave 35	Wave 39
Raw	82%	79%	79%
Stir frying	10%	12%	15%
Other	13%	15%	12%
Soup	2%	5%	9%
Grilling	2%	3%	6%
Boiling	1%	2%	6%
Steaming	2%	3%	6%
Saut�eing	2%	3%	5%
Frying	3%	4%	4%
Microwave	1%	1%	3%

Q9. How do you typically cook <commodity> ?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
Sample Wave 31 N=306, Wave 35 N=310, Wave 39 N=303



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



Q14. When purchasing <commodity>, how important is Provenance to you?
Q15. And when purchasing Cucumber, how important is that it is grown in Australia?
Sample Wave 31 N=306, Wave 35 N=310, Wave 39 N=303

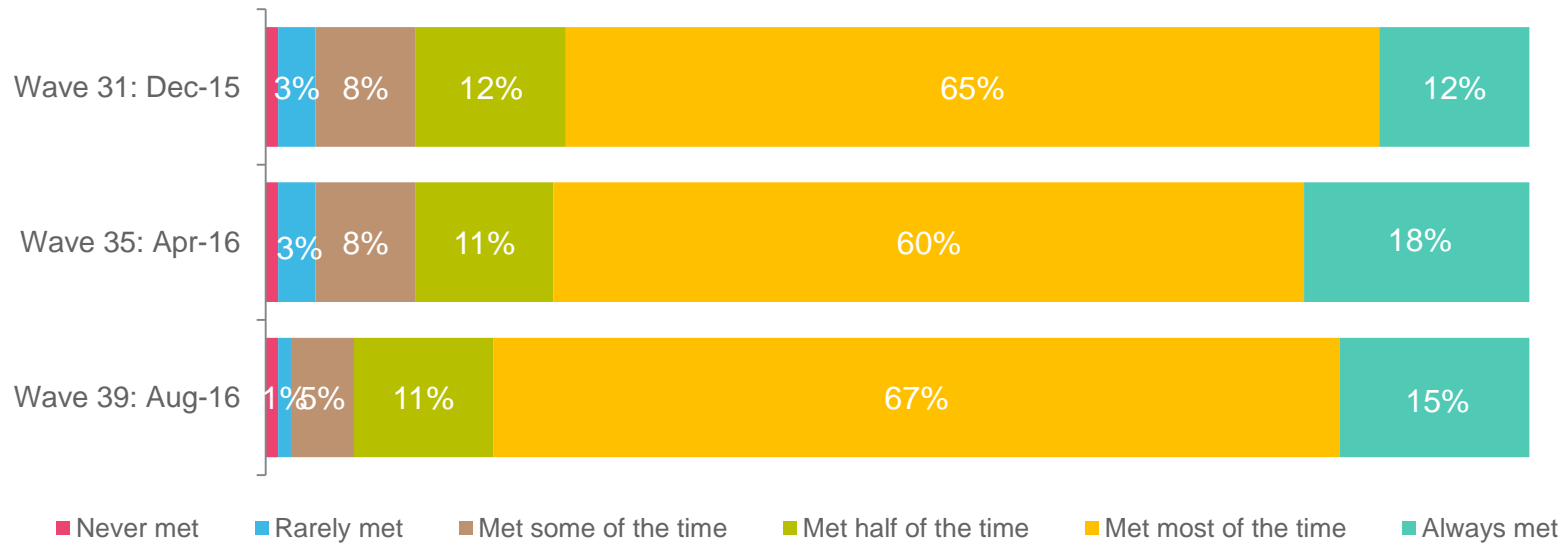


Cucumbers are expected to remain fresh for over a week, which has slightly declined this wave. The amount of consumers who report their freshness expectations are being met most of the time has increased this wave.

Expected to stay fresh for **8.0 days**

▼ 7.3 days, Wave 31
▲ 8.4 days, Wave 35

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 31 N=306, Wave 35 N=310, Wave 39 N=303



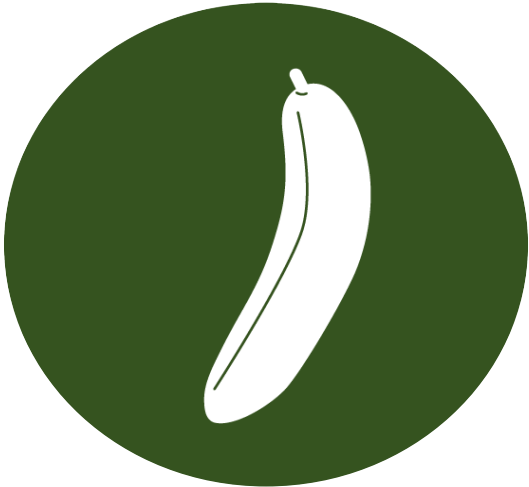
Trends: Cucumber



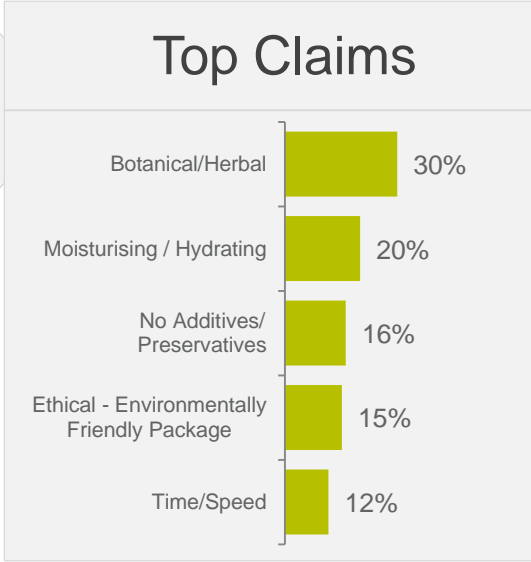
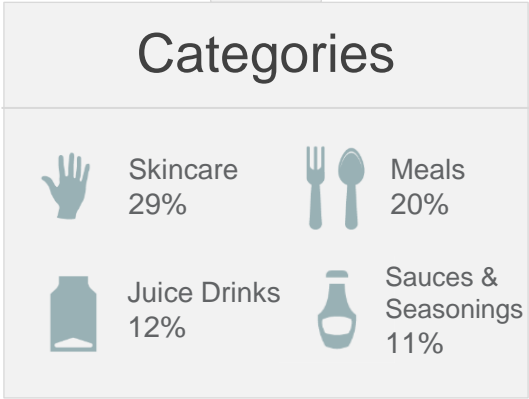
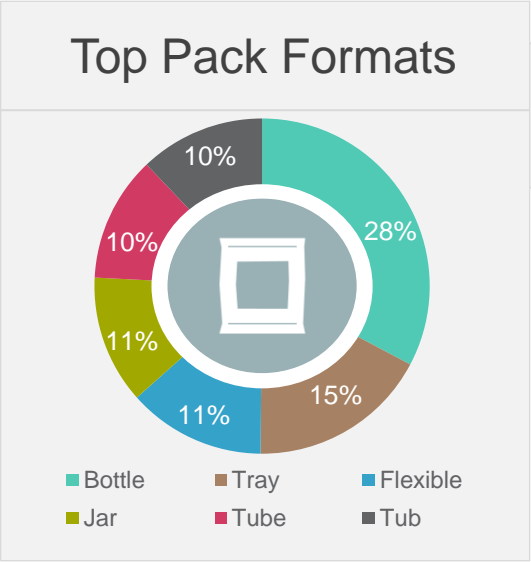
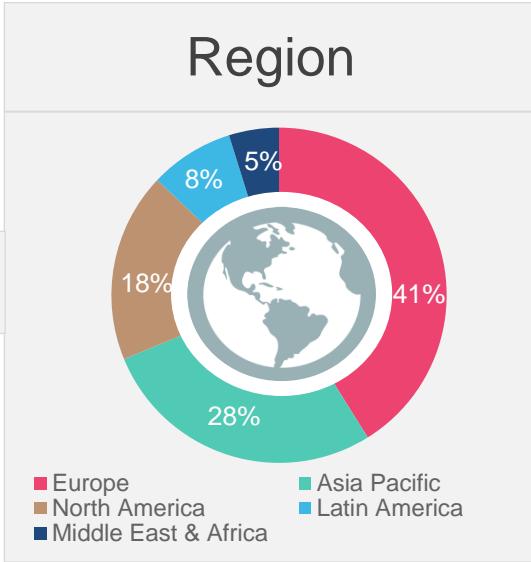
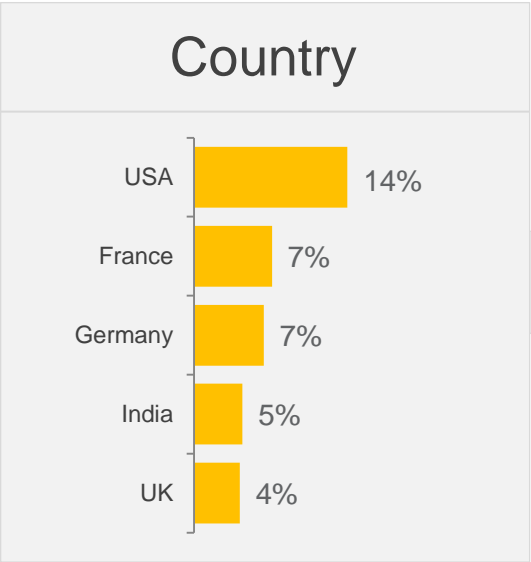
Cucumber Launches

May – August 2016

There were 394 products launched globally in the last three months that contained cucumber as an ingredient. The majority of launches occurred in Europe and Asia Pacific regions. The key categories for launches were skincare, meals, juice drinks and sauces.



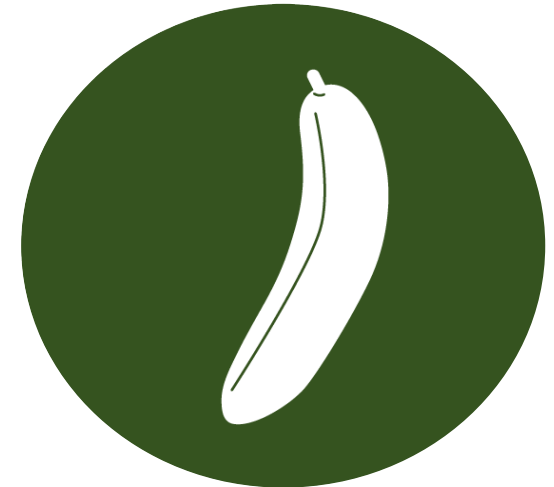
394 Global Launches





Cucumber Product Launches: Last 3 Months (May – August 2016) Summary

- There were 394 cucumber products launched globally, relatively consistent with the previous wave.
- There were 8 products containing cucumber launched in Australia over the last three months.
- Key regions for launch were Europe (41%) and Asia Pacific (28%).
- Bottles (28%), trays (15%) and flexible packaging (11%) were the most common formats used.
- Top category launches were primarily skincare (29%), meals (20%), juice drinks (12%) and sauces & seasonings (11%).
- The top claims used for products were botanical/herbal (30%), moisturising/hydrating (20%), and no additives/preservatives (16%).
- The most innovative launch was a Low Fat Apple Veg Greek Yoghurt Drink from USA (examples can be found in the following pages).



Source: Mintel (2016)

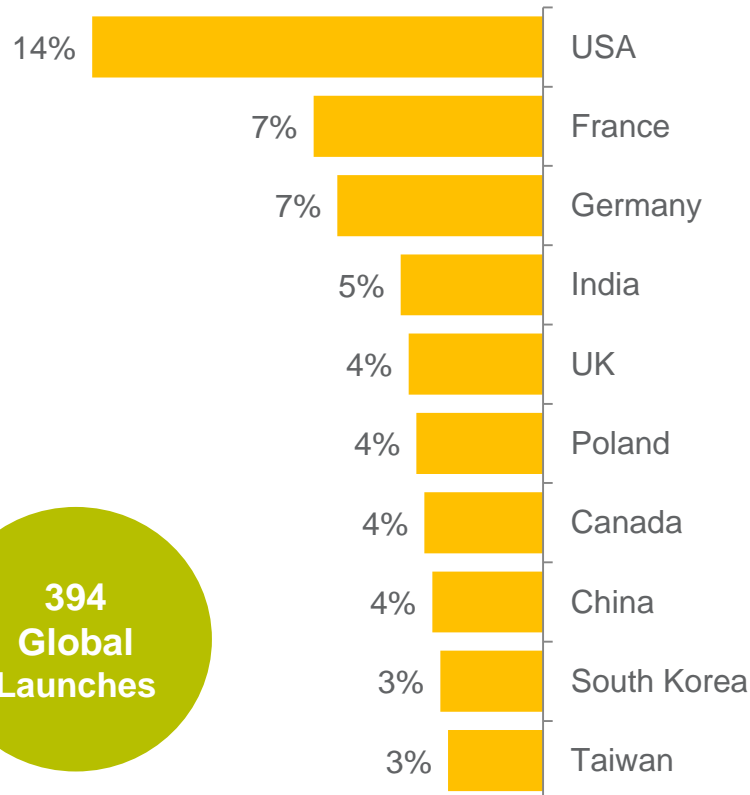




Cucumber Launches

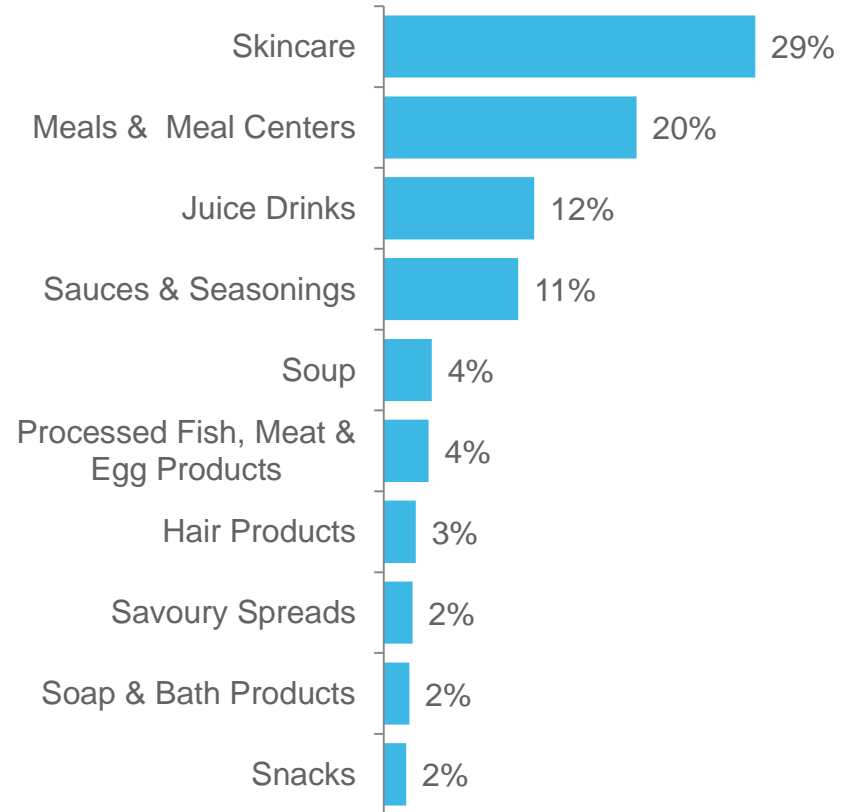
- ➔ USA and France were the main countries of launch for cucumber products.
- ➔ Products were primarily skincare, meals, juice drinks and sauces.

Top Launch Countries



**394
Global
Launches**










Top Launch Categories














The main claims used on products were botanical/herbal and moisturising/hydrating. Bottles and trays were typical packaging formats used.

Pack Formats Used

Global		Bottle	28%
		Tray	15%
		Flexible	11%
Europe		Tray	27%
		Bottle	22%
		Tub	20%
Asia Pacific		Bottle	25%
		Tube	22%
		Flexible	18%

Top Claims Used

Global		Botanical/Herbal	30%
		Moisturising / Hydrating	20%
		Ethical - Environmentally Friendly Package	15%
Europe		Ease of Use	19%
		No Additives/Preservatives	16%
		Ethical - Environmentally Friendly Package	13%
Asia Pacific		Botanical/Herbal	50%
		Moisturising / Hydrating	35%
		Ethical - Animal	23%

»»» Innovative Cucumber Launches: L3M (May – August 2016)

Sunkist Lemon Cucumber Mint Drink (India)

Sunkist Lemon Cucumber Mint Drink is described as a refreshing, non alcoholic, ready to serve beverage. The product is suitable for vegetarians, and retails in a 300ml pack.



Claims:
Vegetarian, Ease of Use

Héritier Vinegar with Cucumber Pulp (Belgium)

Héritier Vinaigre à la Pulpe Concombre (Vinegar with Cucumber Pulp) is said to be ideal for salad, mayonnaise or base for dressings or marinades. The Belgian handmade product retails in a 200ml bottle.



Claims:
N/A

Oil & Vinegar Tzatziki Garlic Dip (Belgium)

Oil & Vinegar Tzatziki Garlic Dip is mixture of salt, herbs and spices for a Greek dip. It can be mixed with water, olive oil, grated cucumber and Greek yogurt, sour cream or mayonnaise for a delicious dip. The product retails in a 50g pack.



Claims:
N/A

Prymat Seasoning Mix for Pickled Cucumbers (Poland)

Prymat Mieszanka do Ogórków Konserwowych (Seasoning Mix for Pickled Cucumbers) is free from monosodium glutamate, preservatives and colours. The product retails in a 40g pack sufficient for approximately six 1L jars of pickles.



Claims:
No Additives/Preservatives

»»» Innovative Cucumber Launches: L3M (May – August 2016)

Korres Cucumber Eye Mask (France)

Korres Masque Concombre (Cucumber Eye Mask) is said to instantly reduce puffiness, dark circles and signs of ageing. The product is made with refreshing, moisturising cucumber extracts, with guarana extract to revive appearance. It is said to decongest, smooth and tone the eye contour for an immediate feeling of well-being. It has been dermatologically- and ophthalmologist-tested and retails in an 8ml pack.



Claims:
Botanical/Herbal, Anti-Ageing, Dermatologically Tested, Ophthalmologically Tested, Moisturising / Hydrating, Reduces Dark Circles / Puffiness*, Reduces Fine Lines / Wrinkles*, Toning*, Time/Speed

Drink Chobani Low Fat Apple Veg Greek Yogurt Drink (USA)

Drink Chobani Low Fat Apple Veg Greek Yogurt Drink is now available. This kosher certified product contains 14g protein, probiotics, 1/3 less sugar per serving than other yogurt drinks and is only made with natural ingredients. It is free of rBST hormone and gluten, contains 1.5% milk fat and retails in a 10-fl. oz. pack featuring the Facebook and Twitter logos. The manufacturer donates 10% of the profits to the charity.



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

Qcumber Cucumber Flavoured Water (Ireland)

Qcumber Cucumber Flavoured Water is described as a perfect blend of natural cucumber and gently sparkling spring water. The product provides instant refreshment straight from the bottle, and is a perfect mixer for gin, vodka, or a summer cocktail. This product is free from preservatives, artificial colours, sweeteners and flavourings, and retails in a 750ml pack.



Claims:
No Additives/Preservatives, Time/Speed

Kikka Spicy Rainbow Roll (USA)

Kikka Spicy Rainbow Roll is now available. The product retails in a 7-oz. pack containing a 5.5ml kosher and preservative-free soy sauce sachet.



Claims:
No Additives/Preservatives, Kosher

»»» Innovative Cucumber Launches: L3M (May – August 2016)

U Jedrusia Venetian Salad with Chicken & Green Cucumber (Poland)

U Jedrusia Salátka Wenecka z Kurczakiem i Zielonym Ogórkiem (Venetian Salad with Chicken & Green Cucumber) is a ready to eat salad without preservatives and colours. This product retails in a 280g pack.



Claims:
No Additives/Preservatives, Ease of Use

Pure Foods Chicken Ham & Cheese Sandwich Spread (Thailand)

Pure Foods Chicken Ham & Cheese Sandwich Spread has been repackaged with a new design. The halal certified product retails in an 130g pack.



Claims:
Halal

The Food Hall Kitchen Hawaiian Smoked Chicken Salad (Indonesia)

The Food Hall Kitchen Hawaiian Smoked Chicken Salad is now available. The freshly made product retails in a plastic pack.



Claims:
N/A

1001 Delights Spicy Cucumber & Yoghurt Sauce with Sesame (Germany)

1001 Delights Pikante Gurken-Joghurtsauce mit Sesam (Spicy Cucumber & Yoghurt Sauce with Sesame) is now available. This product retails in a 300ml pack.



Claims:
N/A



Australian Cucumber Launches: L3M (May – August 2016)

Yumi's Anytime Creamy Tuna Mousse

Yumi's Anytime Creamy Tuna Mousse is said to stay fresh for longer in comparison to products in tubs after opening. The gluten, dairy and preservative free mousse can be used to top a cracker, as a spread on a roll or to dress a baguette. This kosher certified product retails in a 200g pack.



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

Bruce Greener Cold Pressed Juice

Bruce Greener Cold Pressed Juice is now available. The 100% raw product contains spinach, apple, kale, celery, spirulina and lemon. It has never been heat pasteurised, is not from concentrate and is free from colours, added sugar, flavours and preservatives. This product is suitable for vegetarians and retails in a 300ml recyclable bottle.



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

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

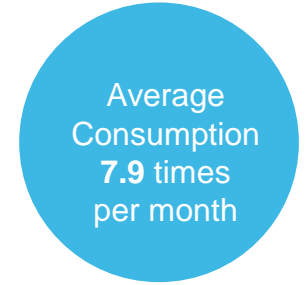
A close-up photograph of several green zucchinis with characteristic light-colored speckles. A large, dark grey circle is superimposed over the center of the image, containing the text 'Zucchini.' in white.

Zucchini.



Both purchase and consumption frequency of zucchini increased this wave.

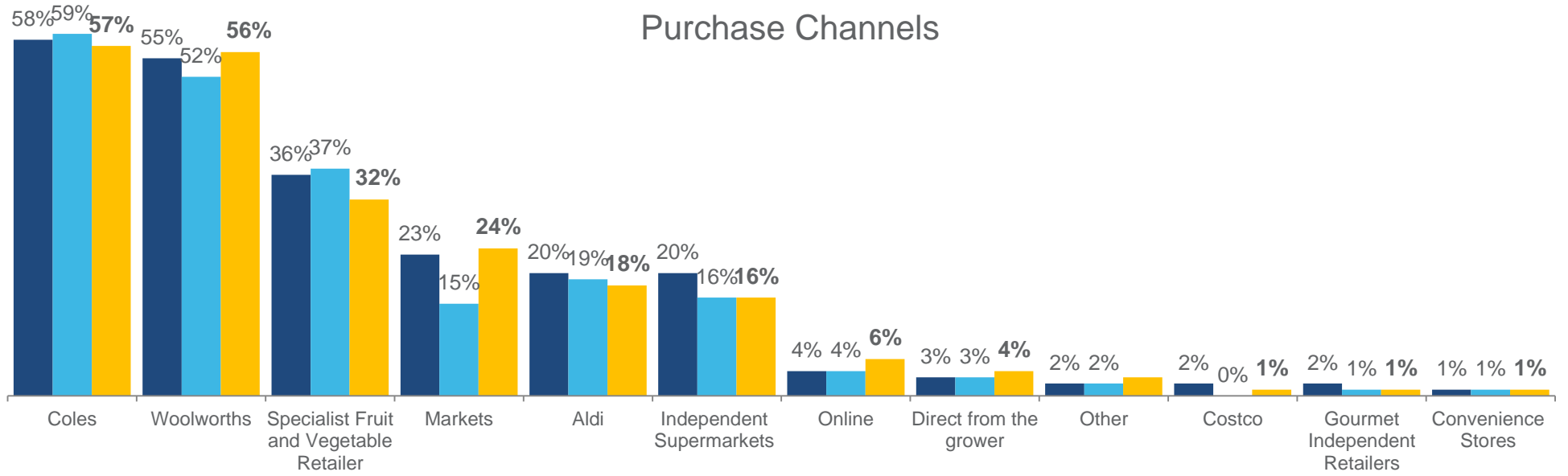
Purchase of zucchini is predominantly through mainstream retail channels. There has been an increase in purchase from markets this wave.



▲ 4.2 times, Wave 31
▼ 3.3 times, Wave 35

▼ 7.8 times, Wave 31
▼ 7.0 times, Wave 35

Purchase Channels



■ Wave 31: Dec-15 ■ Wave 35: Apr-16 ■ Wave 39: Aug-16

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 31 N=304, Wave 35 N=308, Wave 39 N=309



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



Average Spend and Price Sensitivity



Average weight of purchase

The average consumer typically purchases **800g** of zucchini per shop. Purchase weight has increased from previous waves.

- ▼ 700g, Wave 31
- ▼ 700g, Wave 35



Recalled last spend

The average recalled last spend is **\$3.30**, which is higher than past waves.

- ▼ \$3.10, Wave 31
- ▼ \$2.90, Wave 35



Value for money

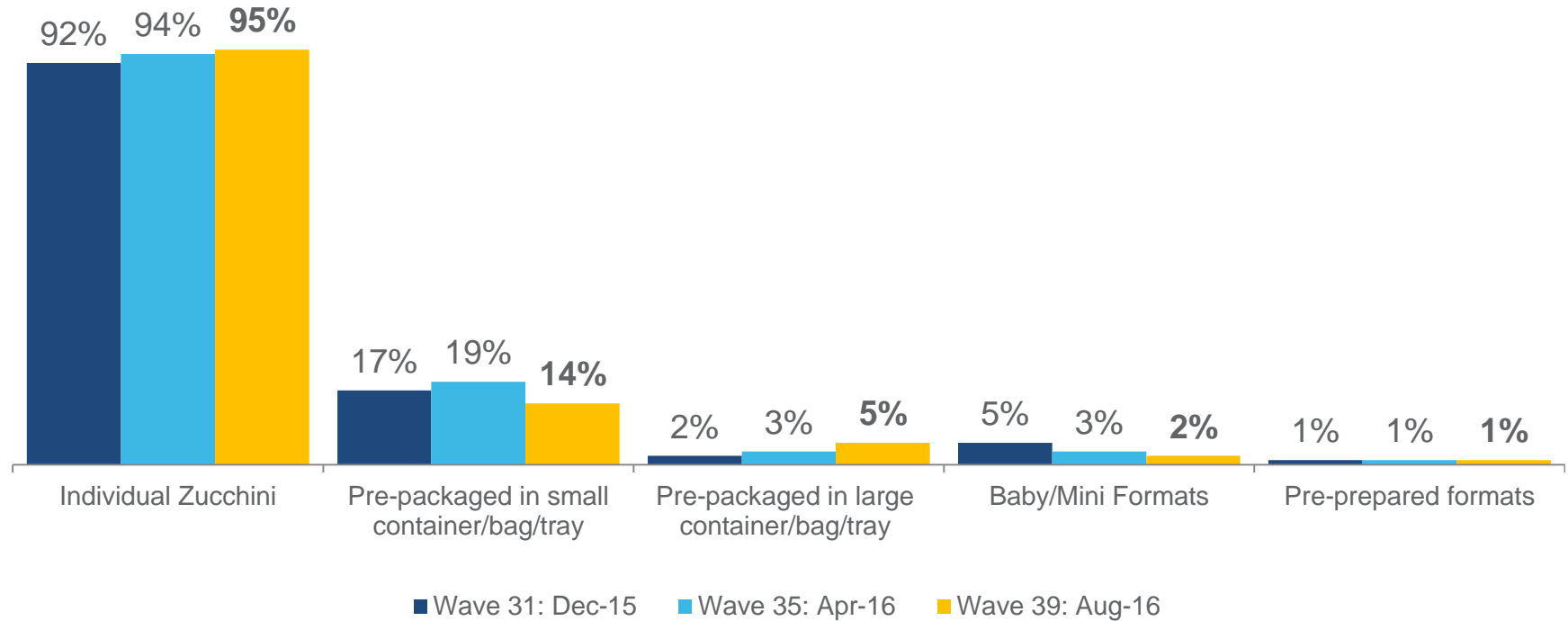
On average, consumers perceive zucchini to be good value for money (**6.7/10**), which has improved over the last three waves.

- ▼ 6.1/10, Wave 31
- ▼ 6.6/10, Wave 35

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 31 N=304, Wave 35 N=308, Wave 39 N=309



Individual zucchini remains the main purchase format. Pre-packaged formats are also purchased by some consumers.

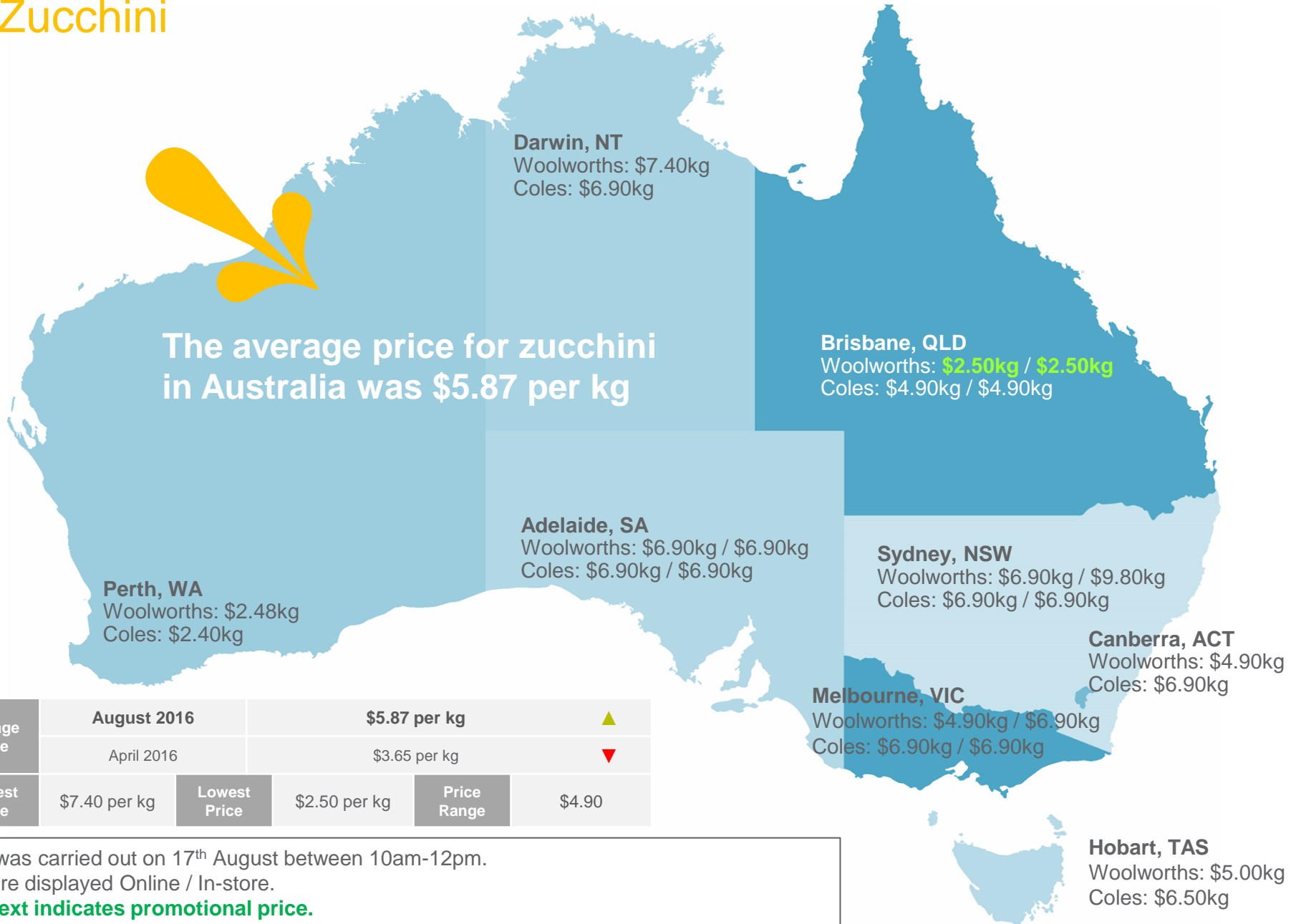


Q4b In what fresh formats do you typically purchase Zucchini?
Sample Wave 31 N=304, Wave 35 N=308, Wave 39 N=309

Online and In-store Commodity Prices



Zucchini



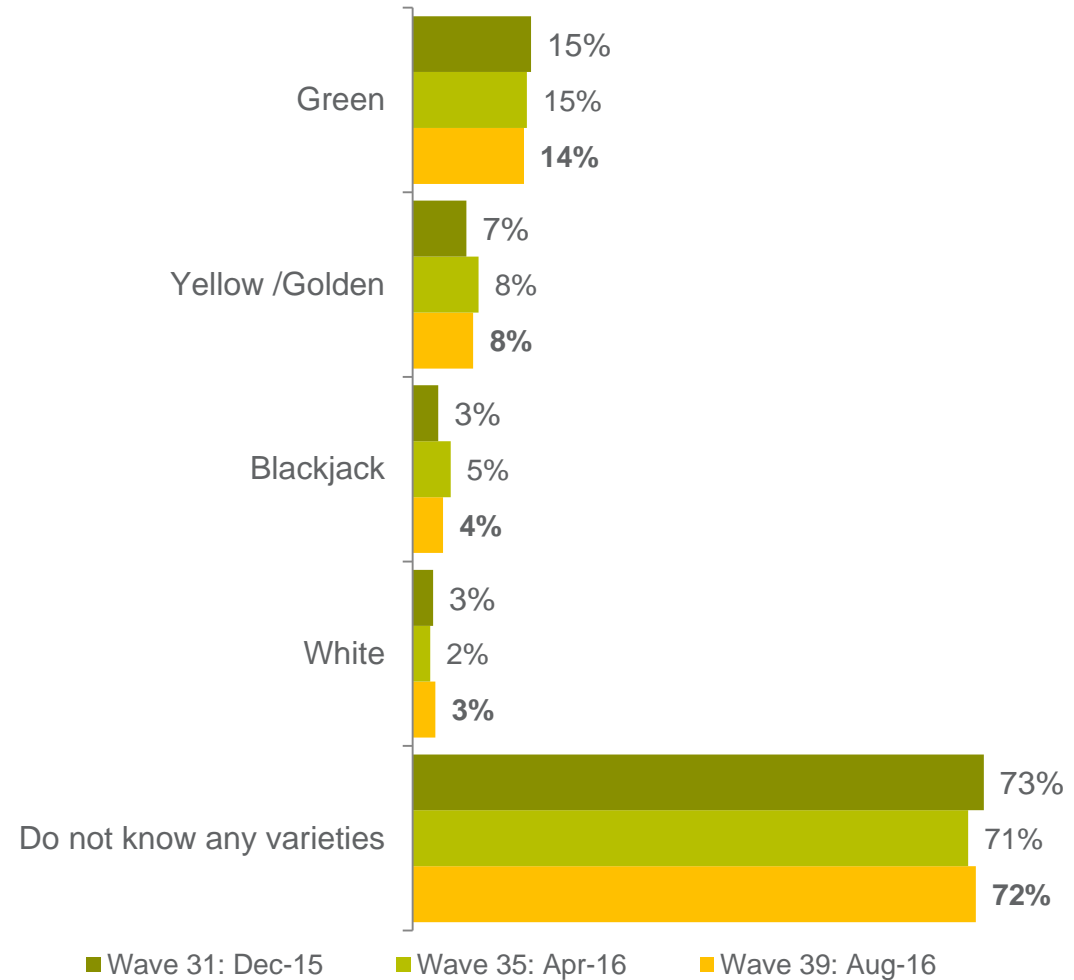
Average Price	August 2016	\$5.87 per kg ▲			
	April 2016	\$3.65 per kg ▼			
Highest Price	\$7.40 per kg	Lowest Price	\$2.50 per kg	Price Range	\$4.90

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



Overall, awareness of zucchini varieties remains very low.

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



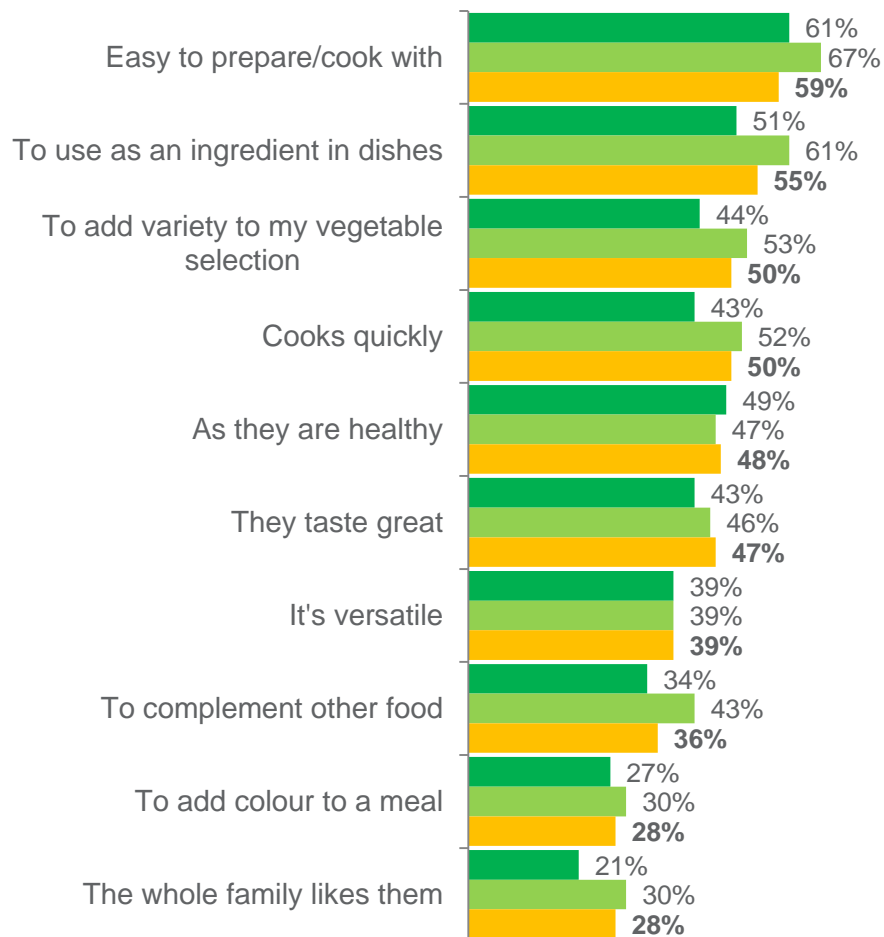
Q6a. What varieties of <commodity> are you aware of? (unprompted)
Sample Wave 27 N=303, Wave 31 N=304, Wave 35 N=308



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

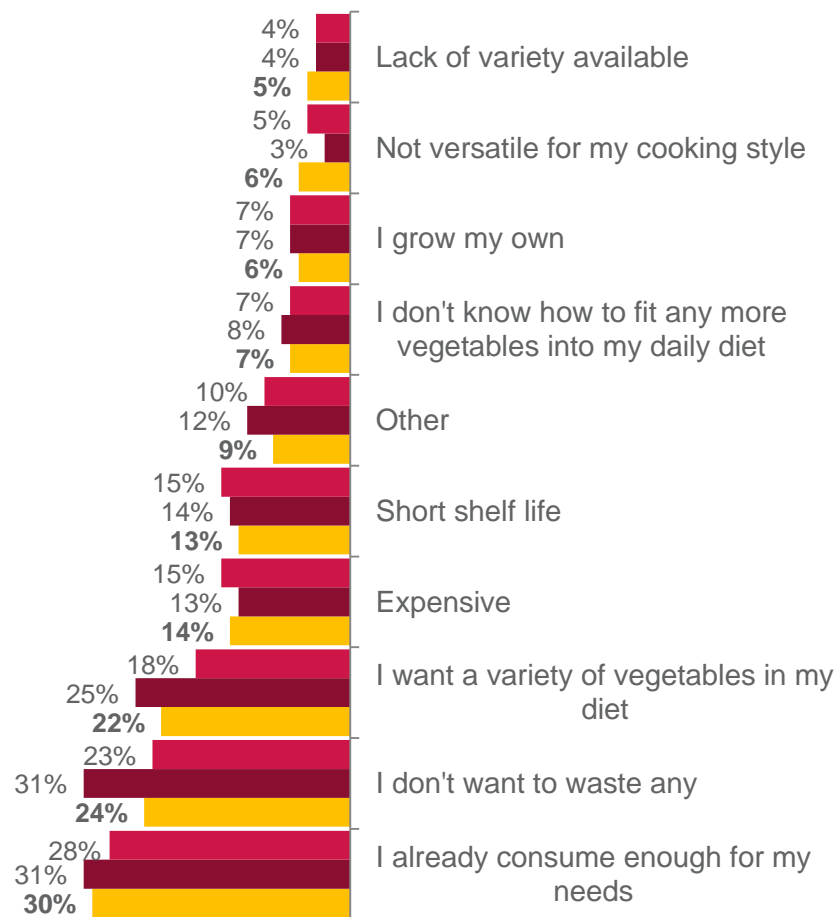


Triggers



■ Wave 31: Dec-15 ■ Wave 35: Apr-16 ■ Wave 39: Aug-16

Barriers



■ Wave 31: Dec-15 ■ Wave 35: Apr-16 ■ Wave 39: Aug-16

Q7. Which of the following reasons best describes why you purchase <commodity>?

Q8. Which reason best describes why you don't buy <commodity> more often?

Sample Wave 31 N=304, Wave 35 N=308, Wave 39 N=309



Zucchini is generally eaten at dinner.

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

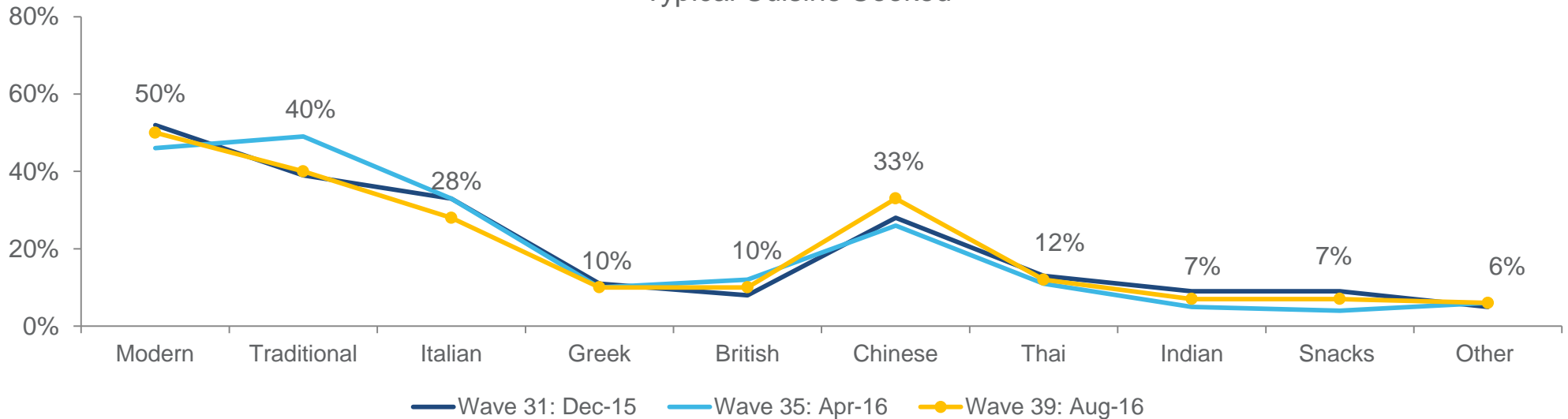
Top 5 Consumption Occasions

	Wave 35	Wave 39
Dinner	76%	72%
Family meals	63%	53%
Weekday meals	51%	46%
Quick Meals	43%	43%
Weekend meals	43%	39%

15%
used zucchini
when cooking a
new recipe

▼ 14%, Wave 35

Typical Cuisine Cooked



← Australian → ← European → ← Asian → Other Cuisines



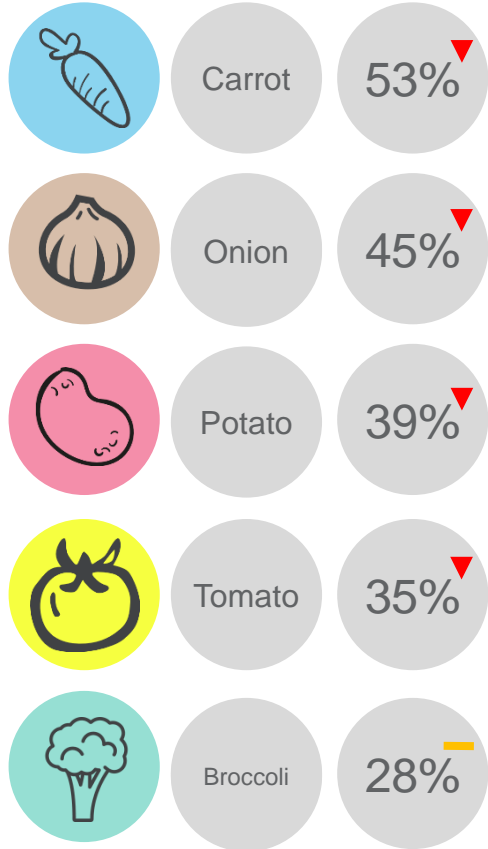
▼ : Indicates LOWER score than current wave.
▲ : Indicates HIGHER score than current wave.

Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?
Sample Wave 31 N=304, Wave 35 N=308, Wave 39 N=309



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

Accompanying Vegetables



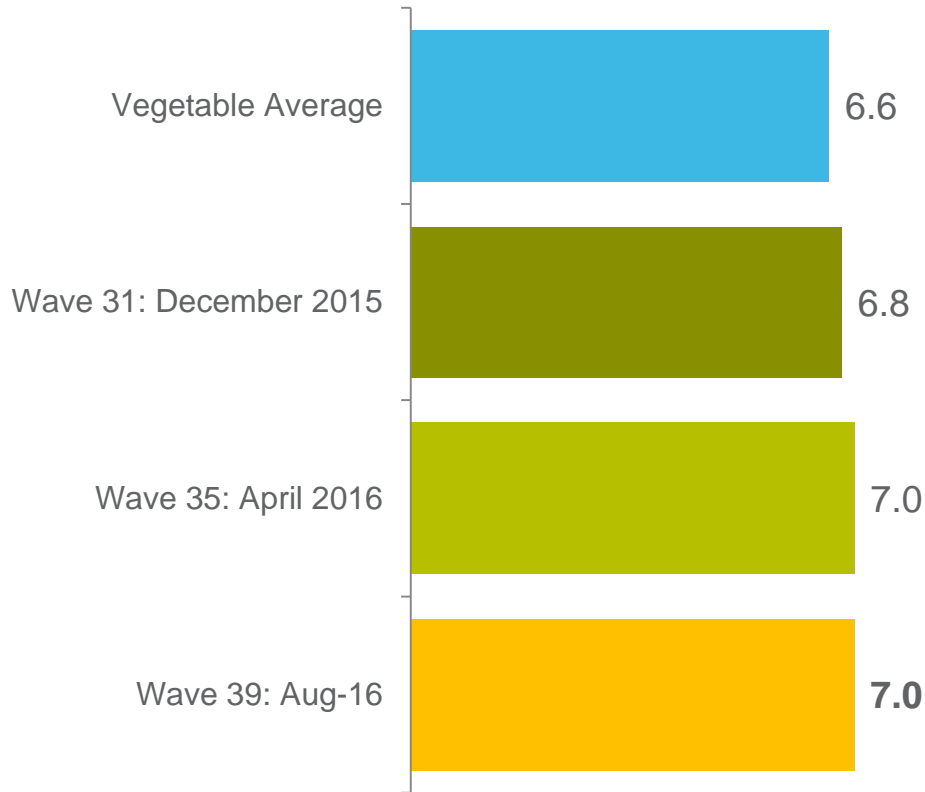
Top Cooking Styles

	Wave 31	Wave 35	Wave 39
Stir frying	47%	54%	52%
Steaming	36%	39%	36%
Roasting	28%	24%	27%
Soup	19%	27%	27%
Sautéing	26%	27%	27%
Baking	25%	25%	23%
Frying	24%	27%	22%
Grilling	18%	21%	17%
Boiling	15%	20%	17%
Raw	16%	15%	16%

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 31 N=304, Wave 35 N=308, Wave 39 N=309



Importance of provenance has remained stable this wave, sitting above the Vegetable Average. Consumers want to know the provenance of zucchinis they purchase and most importantly, that it is grown in Australia.



Q14. When purchasing Zucchini, how important is Provenance to you?
Q15. And when purchasing Zucchini, how important is that it is grown in Australia?
Sample Wave 31 N=304, Wave 35 N=308, Wave 39 N=309

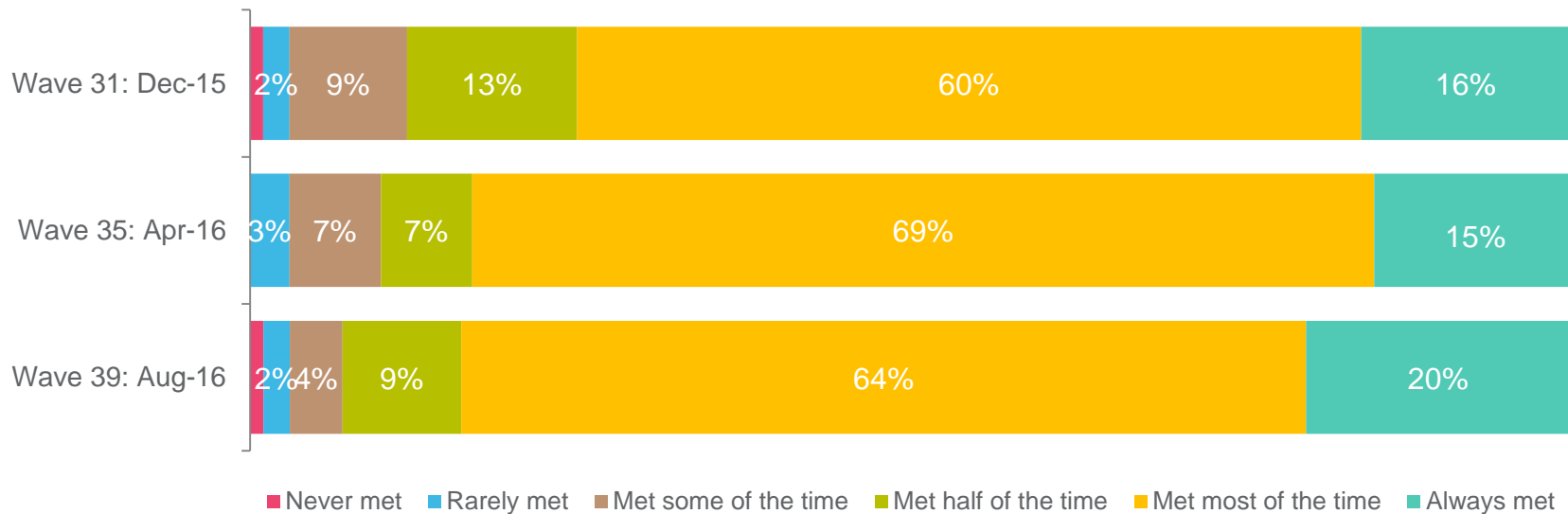


Zucchinis are expected to stay fresh for just over a week once purchased, increasing over the last three waves. There has been an increase in expectations of zucchini always being met in comparison to previous waves.

Expected to stay fresh for 8.2 days

- ▼ 7.7 days, Wave 31
- ▼ 7.9 days, Wave 35

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 31 N=304, Wave 35 N=308, Wave 39 N=309



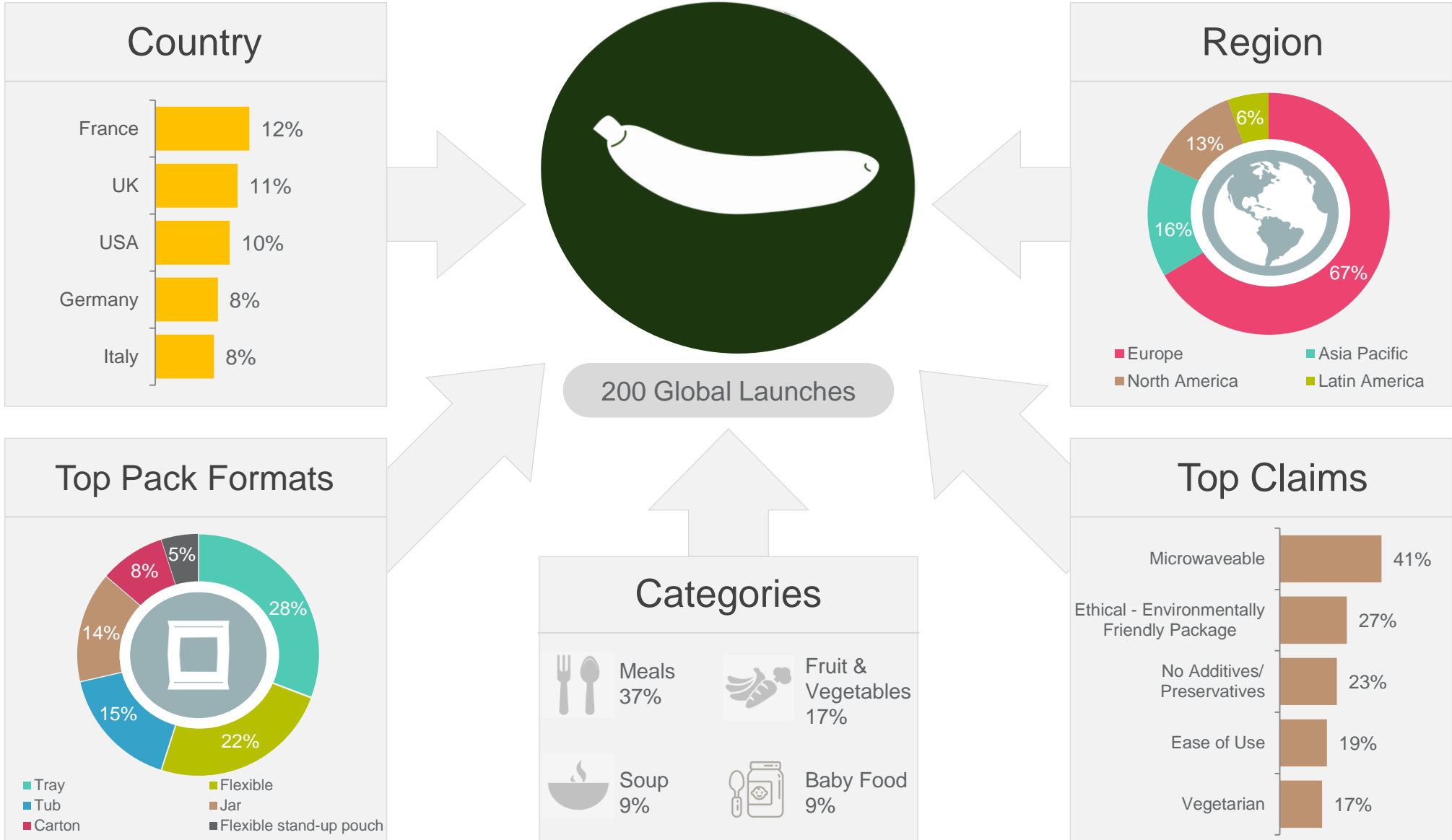
Trends: Zucchini



Zucchini Global Launches

May – August 2016

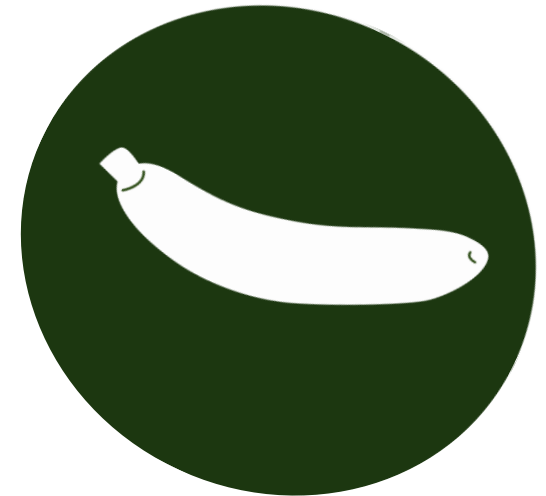
There were 200 zucchini products launched in the last three months. The majority of launches occurred in Europe. The key countries for launch included France, UK and USA. Categories for launches included meals, fruit & vegetables and soups.





Zucchini Product Launches: Last 3 Months (May – August 2016) Summary

- There were 200 products launched globally in the last three months. This was continually increased over the last three waves.
- Domestically, there were five products launched that contained zucchini as an ingredient.
- Launches predominantly occurred in Europe (67%), followed by Asia Pacific (16%).
- The most common packaging used for launches were tray (28%) and flexible (22%) formats.
- Meals (37%), fruit & vegetables (17%) and soups (9%) were the main categories for launches.
- Microwavable (41%) remained the most common claim used for products. Ethical – Environmentally Friendly Packaging (27%) was also frequently used.
- The most innovative launch this wave was Courgetti & Vegetable Spaghetti with Steak Bolognese from UK (other examples can be found in the following pages).

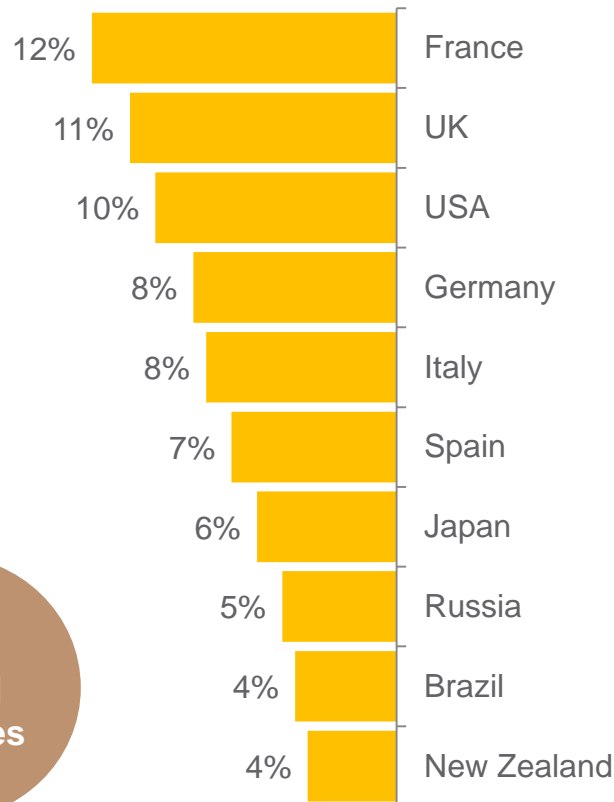




Zucchini Launches

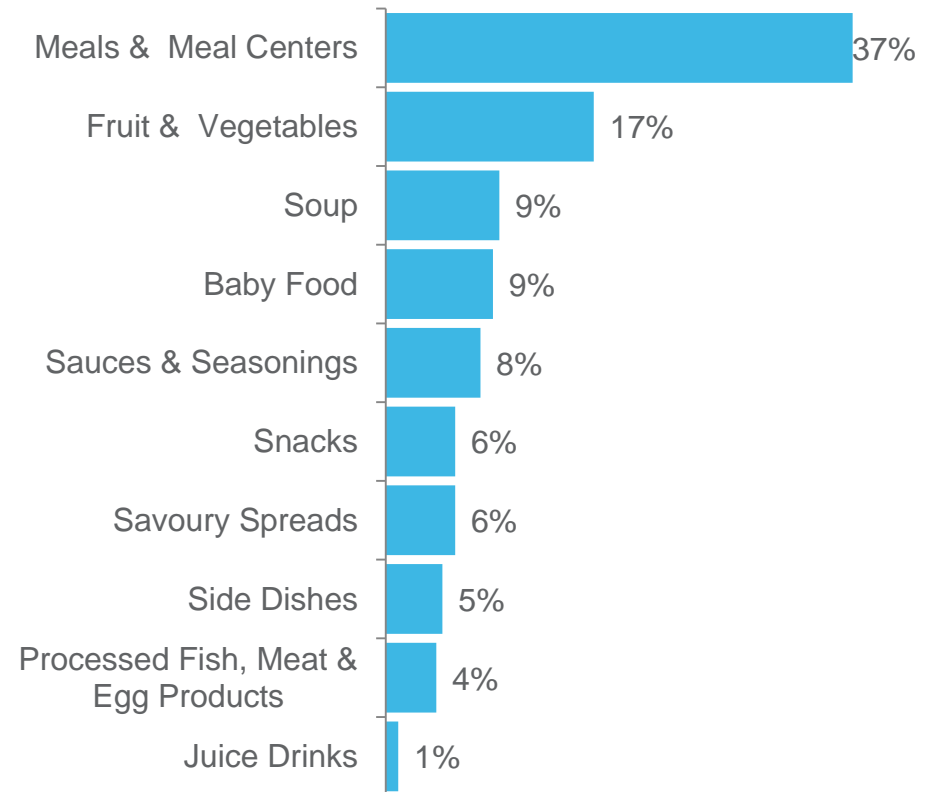
- ▶ France was the key country for launches over the last three months, consistent with previous waves.
- ▶ Top categories for products were meals, fruit & vegetables and soups.

Top Launch Countries



200
Global
Launches







Top Launch Categories





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

Pack Formats Used

Global		Tray	28%
		Flexible	22%
		Tub	15%
Europe		Tray	29%
		Flexible	26%
		Jar	17%

Top Claims Used

Global		Microwaveable	41%
		Ethical - Environmentally Friendly Package	27%
		No Additives/Preservatives	23%
Europe		Microwaveable	38%
		Ethical - Environmentally Friendly Package	30%
		Ease of Use	24%

»»» Innovative Zucchini Launches: L3M (May – August 2016)

DM Bio Zucchini, Pineapple & Curry Spread (Germany)

DM Bio Zucchini Ananas & Curry Gemüseaufstrich (Zucchini, Pineapple & Curry Spread) is organic certified and suitable for vegans. The product retails in a 135g pack, bearing the EU Green Leaf and Bio logos.



Claims:
Organic, Vegan, No Animal Ingredients

M&S Spirit of Summer Glazed Salmon & Green Quinoa Salad (Ireland)

M&S Spirit of Summer Glazed Salmon & Green Quinoa Salad comprises quinoa, wheat berries and glazed Scottish Lochmuir salmon with pepper, courgette, butternut squash, radish and coriander and a lime ginger and amarillo chilli dressing. The product retails in a 230g pack featuring the Forever Fish logo.



Claims:
Seasonal, Ethical - Environmentally Friendly Product

Marks & Spencer Balanced For You Courgetti & Vegetable Spaghetti with Steak Bolognese (UK)

Marks & Spencer Balanced For You Courgetti & Vegetable Spaghetti with Steak Bolognese is made with British beef, bolognese and carrot spaghetti with broccoli, courgette and cheddar cheese. This microwavable product is high in protein, which is needed to maintain growth in muscles. It provides 228 calories and three of the five a day portions of fruit and vegetables, and retails in a 400g pack featuring the Eat Well logo.



Claims:
Microwaveable, High Protein, Weight & Muscle Gain

M&S Spirit of Summer BBQ Grill Halloumi Kebabs (UK)

M&S Spirit of Summer BBQ Grill Halloumi Kebabs have been relaunched with a new brand. The product comprises courgette, red and yellow pepper and halloumi cheese in a lemon, garlic and basil marinade. It is suitable for vegetarians, and retails in a 330g pack.



Claims:
Vegetarian, Seasonal

»»» Innovative Zucchini Launches: L3M (May – August 2016)

Veldfris Penne Salad with Tomato and Zucchini (Germany)

Veldfris Penne Salat mit Tomate und Zucchini (Penne Salad with Tomato and Zucchini) is freshly prepared. This product retails in a 350g pack.



Claims:
N/A

M&S Sunshine Vegetables (France)

M&S Mélange de Légumes avec du Pak Choi, des Carottes, des Mini-Epis de Maïs, de la Courge Doubeurre et des Piments Rouges (Sunshine Vegetables) comprise mixed vegetables with pak choi, carrots, baby corn, butternut squash and red chillies. The mild spicy and air freighted product is said to be perfect for stir fry or soup dishes, provides one portion of vegetables per half a pack, and retails in a 220g pack bearing the Eat Well logo.



Claims:
N/A

Marks & Spencer Courgette Spaghetti (France)

Marks & Spencer Courgette Spaghetti is described as the perfect replacement for pasta. The ready-to-cook product can be cooked in the bag in three minutes in a microwave, and retails in a 250g pack featuring the Eat Well logo.



Claims:
Microwaveable, Ease of Use

Unique Italia Courgetti Nests (UK)

Uniquetalia Courgetti Nests are oven-dried in small batches in Puglia and are said to be a perfect gluten-free alternative to spaghetti. This vegan product is quick and easy to cook, is free from additives and preservatives, provides one portion of vegetables per nest, and retails in a 20g pack.



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

»»» Innovative Zucchini Launches: L3M (May – August 2016)

1001 Delights Stuffed Zucchini with Rice (UK)

1001 Delights Stuffed Zucchini with Rice are now available. This product is suitable for vegans and vegetarians and retails in a 350g recyclable pack.



Claims:
Vegetarian, Ethical - Environmentally Friendly Package, Vegan, No Animal Ingredients

Pepetto Alimentos Sweet Potato Cream with Zucchini and Watercress (Brazil)

Pepetto Alimentos Creme de Batata Doce com Abobrinha e Agrião (Sweet Potato Cream with Zucchini and Watercress) has no gluten or lactose. It is described as a source of vitamin A, fiber and low glycemic index carbohydrate. The product retails in a 500g pack featuring preparation instructions.



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

Oliviers & Co. Zucchini & Tomato Paste (Norway)

Oliviers & Co. Squash & Tomat (Zucchini & Tomato Paste) is made according to a recipe from Gérald Passédat. The product retails in a 140g jar.



Claims:
N/A

BOL Salad Jar The Mediterranean Salad (UK)

BOL Salad Jar The Mediterranean Salad comprises chickpeas, carrot, courgette, roasted butternut squash and feta with a lemon and sun-dried tomato dressing. The vegetarian suitable product retails in a 300g pack featuring the Facebook, Instagram and Twitter logos.



Claims:
Vegetarian, Social Media



Australian Zucchini Launches: L3M (May – August 2016)

Mamia Organic Garden Pea, Zucchini & Spinach Puree

Mamia Organic Garden Pea, Zucchini & Spinach Puree has been repackaged. This premium product is made with organic vegetables, is suitable for babies over four months of age, and contains no artificial colours or flavours, preservatives, added sugar or salt. It is ready to eat, can be used on the go, and served warm or cold by simply squeezing it into a bowl. The product retails in a 120g pack featuring the Australian Certified Organic logo.



Claims:
No Additives/Preservatives,
Low/No/Reduced Sugar, Organic,
Low/No/Reduced Sodium, Babies & Toddlers
(0-4), Premium, On-the-Go, Ease of Use

Australian Eatwell Tomato, Onion & Basil Vegetable Sausages

Australian Eatwell Tomato, Onion & Basil Vegetable Sausages have been repackaged in a newly designed pack. This 100% vegan product is free from cholesterol and GMO, and retails in a 320g easy peel pack containing eight sausages and featuring a Facebook link.



Claims:
Low/No/Reduced Cholesterol, Vegan,
Convenient Packaging, No Animal
Ingredients, GMO-Free, Social Media

Romeo's Classic Fresh Vegetable Lasagne

Romeo's Classic Fresh Vegetable Lasagne is now available. The microwavable product retails in a 500g pack.



Claims:
Microwavable

Lean Cuisine Whole Grains Moroccan Chicken with Couscous & Lentils

Lean Cuisine Whole Grains Moroccan Chicken with Couscous & Lentils has been relaunched, as it was previously known under the brand Lean Cuisine Whole Grains Steam. The 97% fat-free meals is very high in wholegrains, proteins and fibre, and low in cholesterol. It provides two full servings of vegetables and contains no artificial colours, flavours or preservatives. The microwavable product comprises tender slow cooked chicken, chickpeas, zucchini and sultanas in a Moroccan spiced sauce served with wholemeal couscous and lentils.



Claims:
Vegetarian, Social Media



Eggplant.



Both purchase and consumption frequency declined this wave.

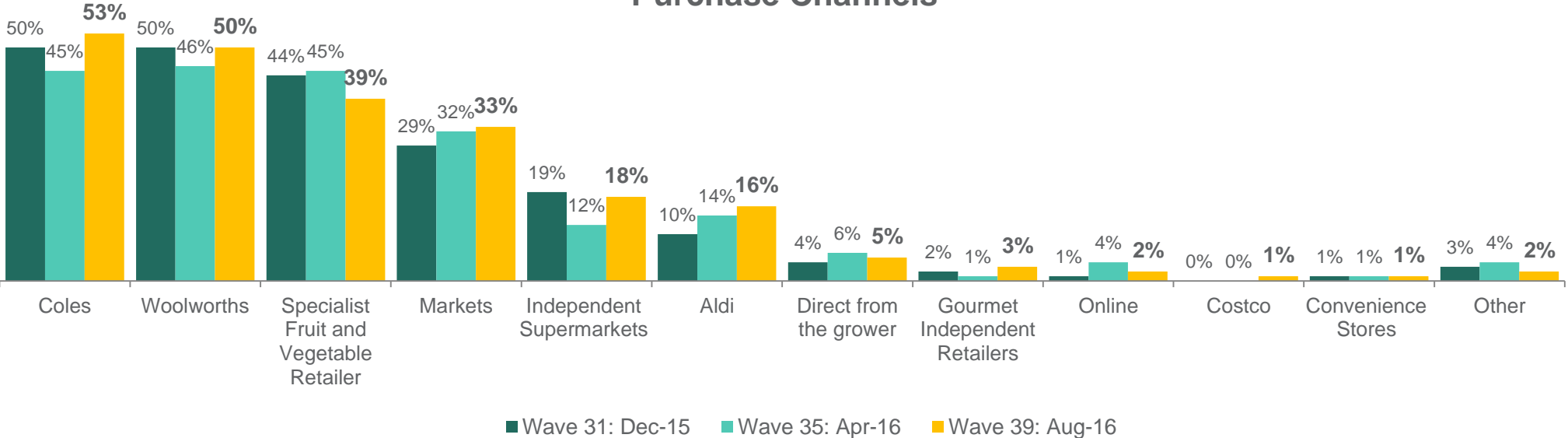
Eggplant is primarily purchased through mainstream retailers. There has been an increasing trend in purchase from markets and Aldi.



- 2.9 times, Wave 31
- 3.3 times, Wave 35

- 4.2 times, Wave 31
- 5.3 times, Wave 35

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 31 N=202, Wave 35 N=201, Wave 39 N=200



Average Spend and Price Sensitivity



Average weight of purchase

On average, consumers purchase **800g** of eggplant, which has slightly declined this wave.

- 800g, Wave 31
- 900g, Wave 35



Recalled last spend

Recalled last spend on eggplant purchase is **\$4.10**, slightly higher than the previous waves.

- ▼ \$4.00, Wave 31
- ▼ \$4.00, Wave 35



Value for money

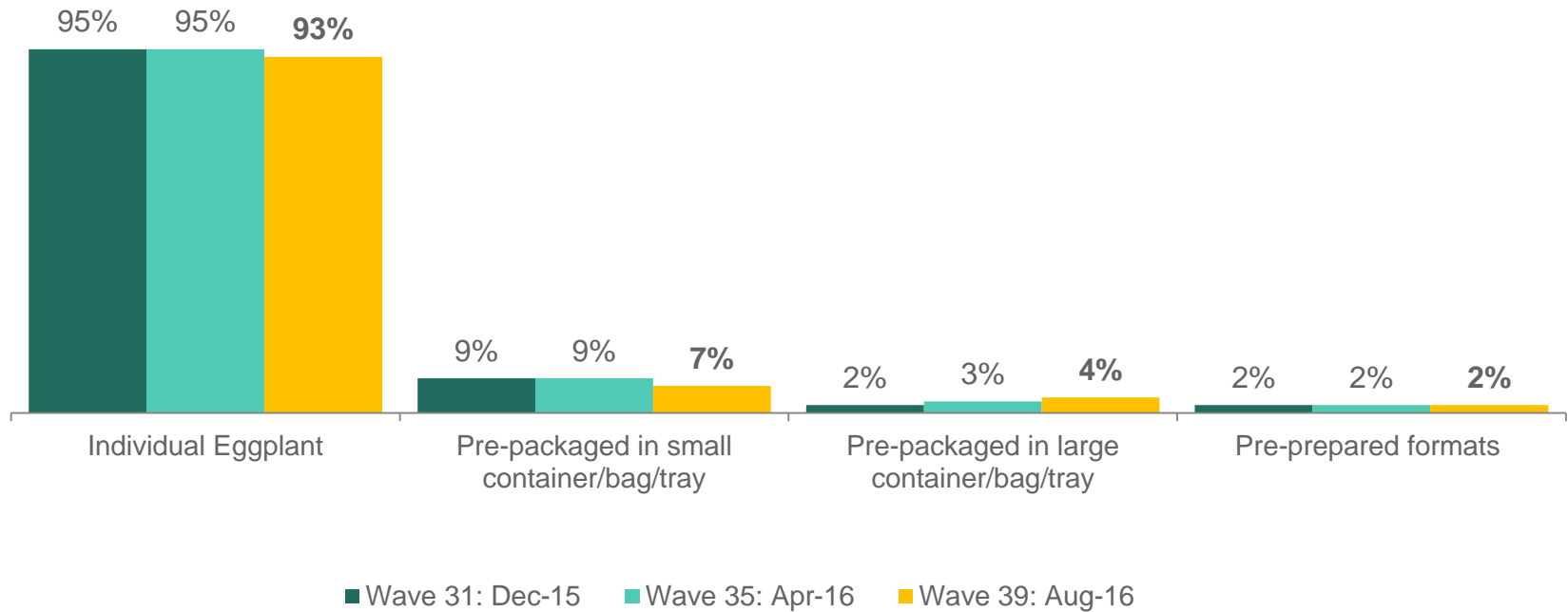
Overall consumers' perceived value for money is fair (**6.1/10**), which has slightly declined since April 2016.

- ▲ 6.2/10, Wave 31
- ▲ 6.3/10, Wave 35

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 31 N=202, Wave 35 N=201, Wave 39 N=200



»»» The large majority of consumers purchase individual eggplants, consistent with past waves.

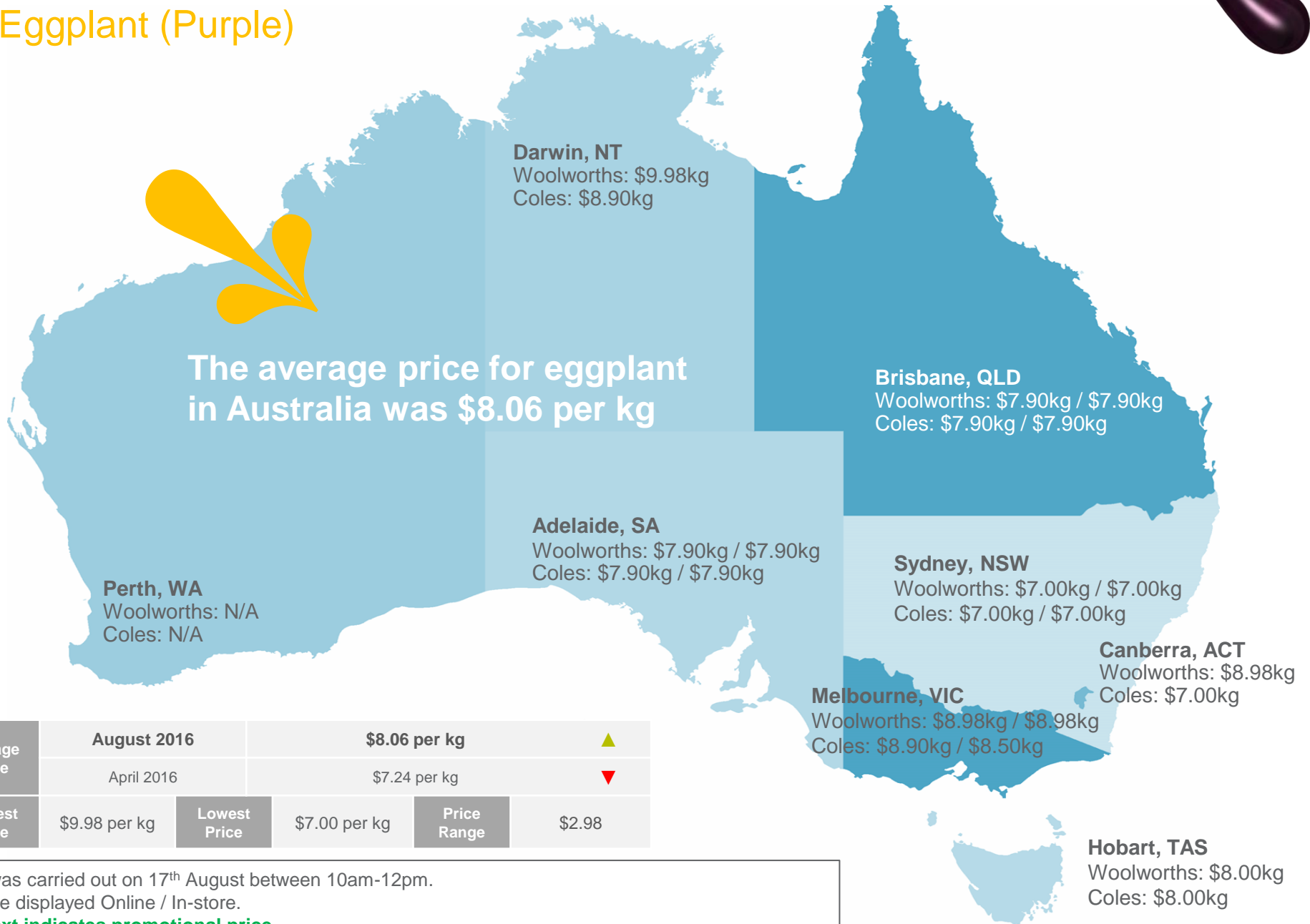


Q4b In what fresh formats do you typically purchase Eggplant?
Sample Wave 31 N=202, Wave 35 N=201, Wave 39 N=200



Online and In-store Commodity Prices

Eggplant (Purple)



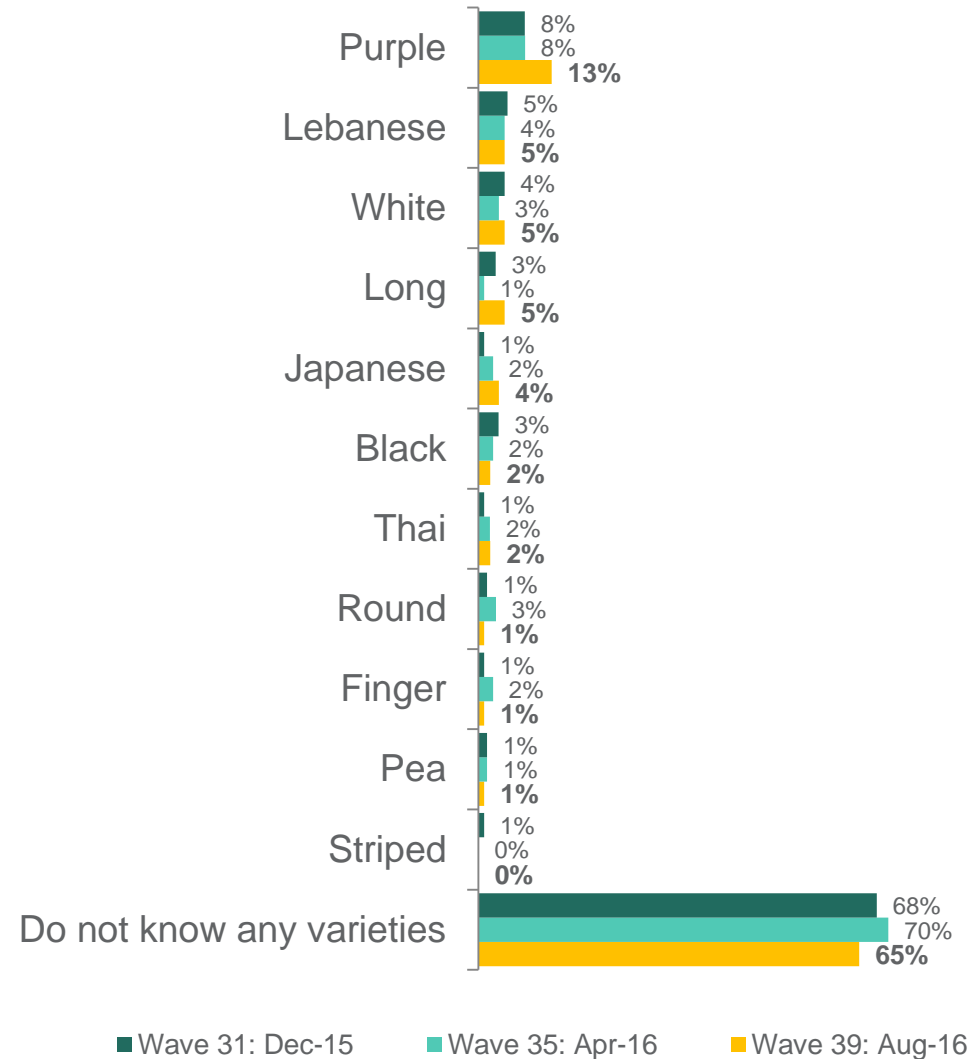
Average Price	August 2016	\$8.06 per kg ▲			
	April 2016	\$7.24 per kg ▼			
Highest Price	\$9.98 per kg	Lowest Price	\$7.00 per kg	Price Range	\$2.98

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



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

Consumers are prompted by colour and location for eggplant varieties.

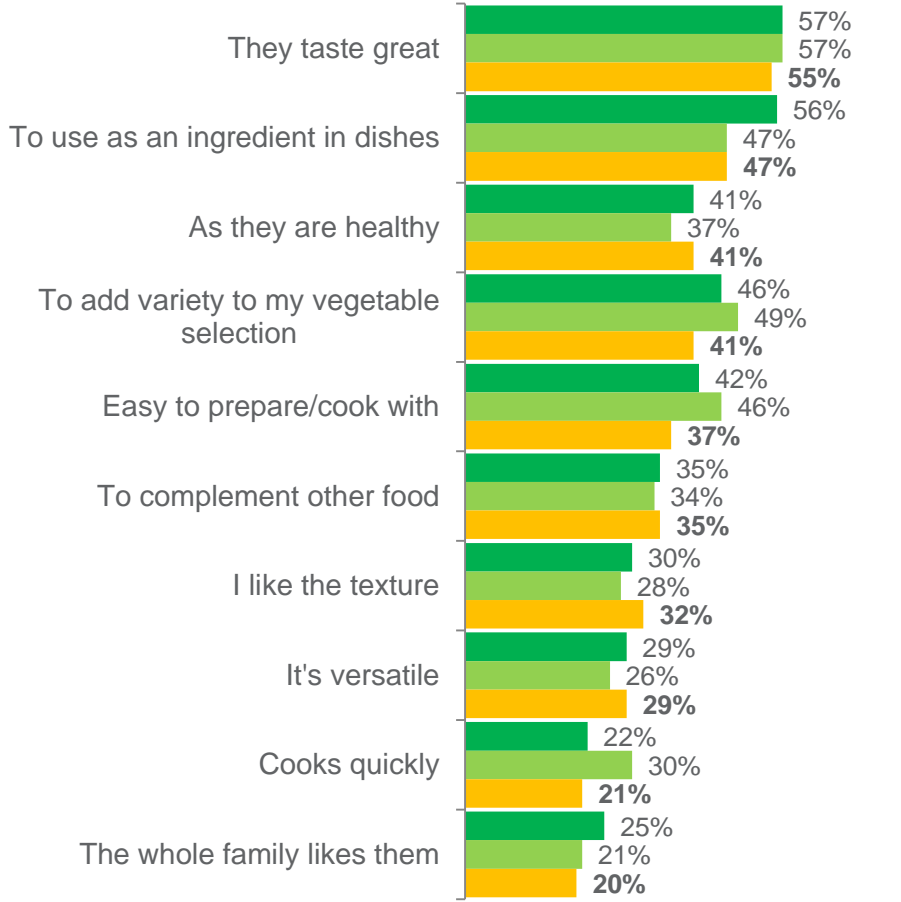


Q6a. What types/varieties of <commodity> are you aware of? (unprompted)
Sample Wave 31 N=202, Wave 35 N=201, Wave 39 N=200



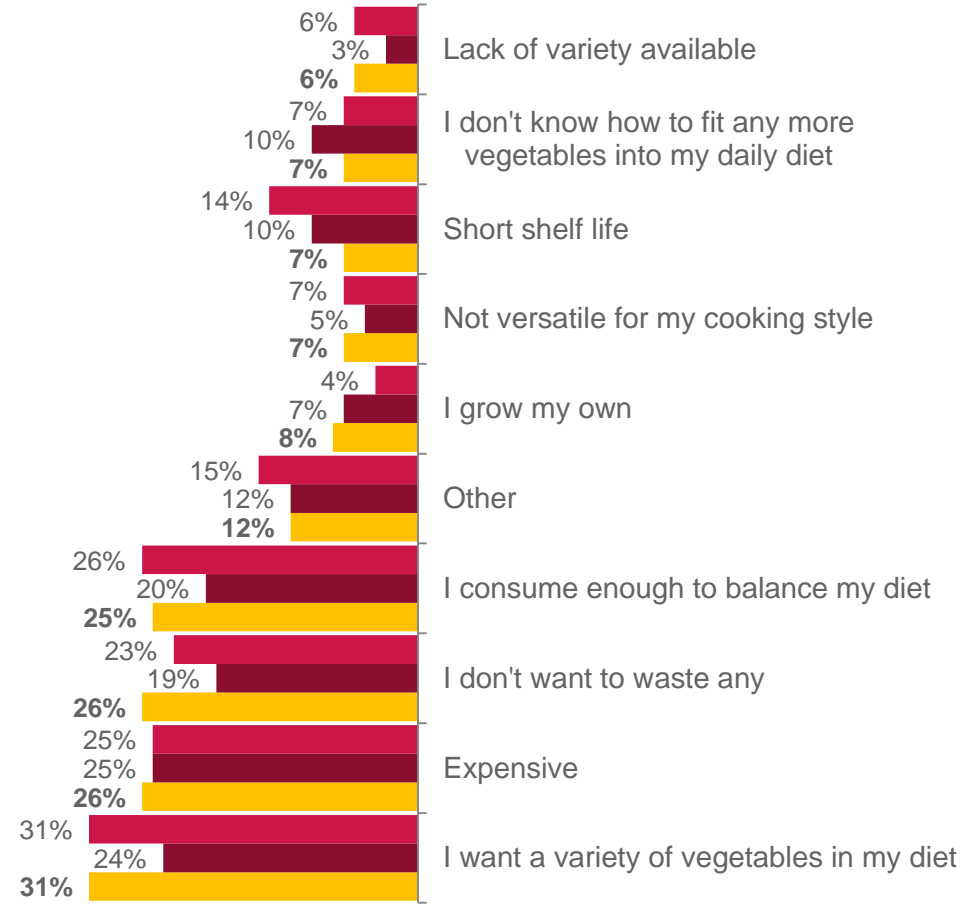
The key triggers to eggplant purchase are taste and use as an ingredient in dishes. Wanting a variety and price are the key barriers to purchase. Short shelf life has decreased as a barrier to purchase over the last three waves.

Triggers



■ Wave 31: Dec-15 ■ Wave 35: Apr-16 ■ Wave 39: Aug-16

Barriers



■ Wave 31: Dec-15 ■ Wave 35: Apr-16 ■ Wave 39: Aug-16

Q7. Which of the following reasons best describes why you purchase <commodity> ?
Q8. Which reason best describes why you don't buy <commodity> more often?
Sample Wave 31 N=202, Wave 35 N=201, Wave 39 N=200



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

Dinner remains the main consumption occasion.

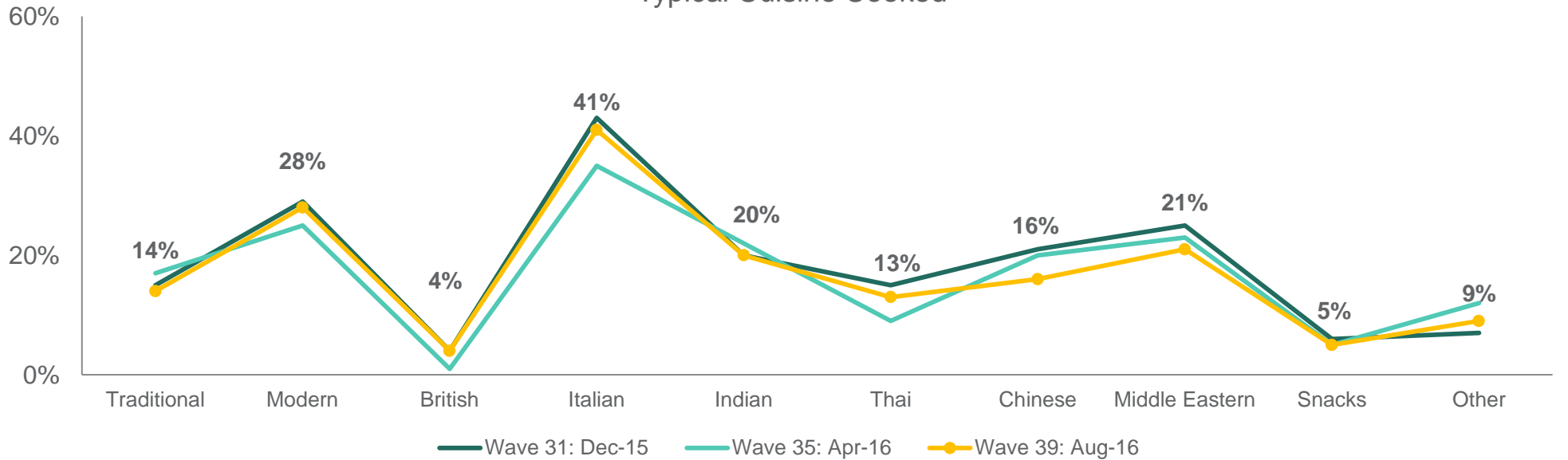
Top 5 Consumption Occasions

	Wave 35	Wave 39
Dinner	63%	66%
Family Meals	58%	55%
Weekday Meals	33%	33%
Weekend Meals	29%	28%
Quick Meals	23%	19%

16%
used eggplant when cooking a new recipe

16%, Wave 35

Typical Cuisine Cooked



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

Q10. What cuisines do you cook/consume that use <commodity> ?
 Q11. Which of the following occasions do you typically consume/use <commodity> ?
 Sample Wave 31 N=202, Wave 35 N=201, Wave 39 N=200

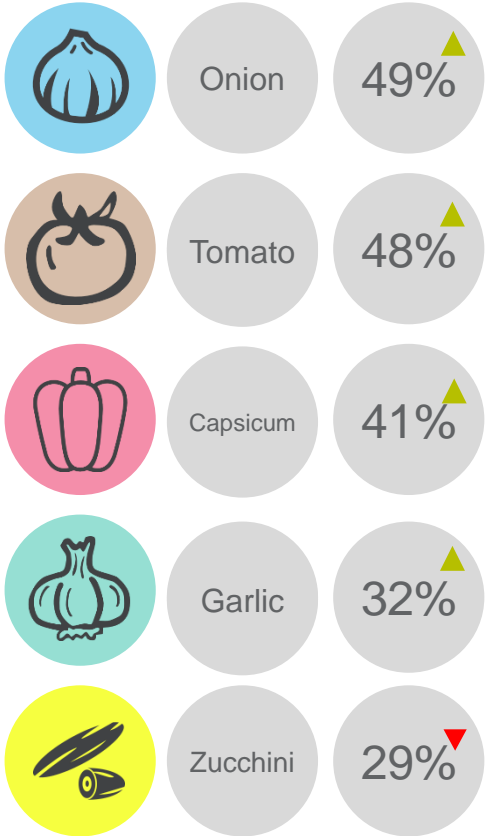


▼ : Indicates LOWER score than current wave.
 ▲ : Indicates HIGHER score than current wave.



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

Accompanying Vegetables



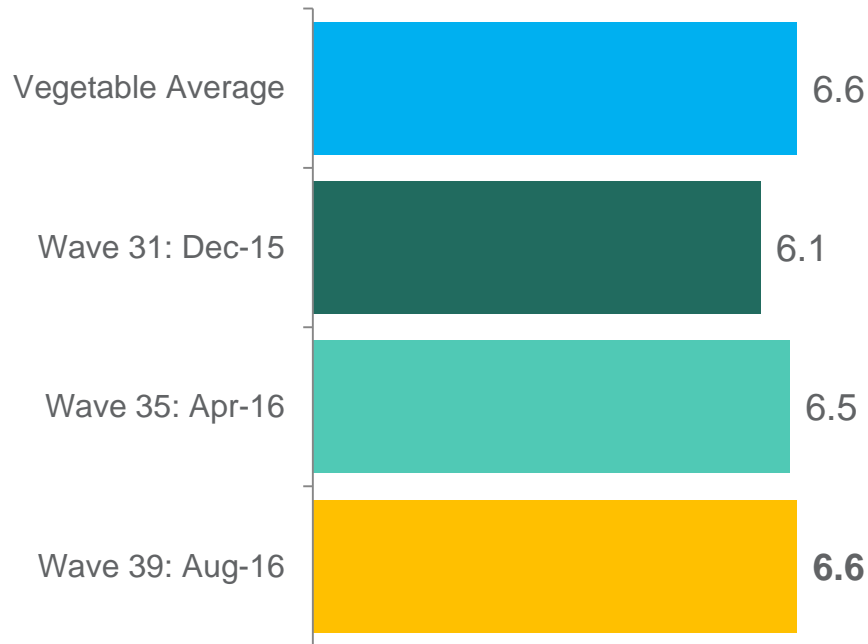
Top Cooking Styles

	Wave 31	Wave 35	Wave 39
Frying	46%	46%	40%
Roasting	36%	36%	36%
Grilling	40%	42%	33%
Stir frying	38%	35%	31%
Baking	36%	33%	31%
Sautéing	25%	26%	29%
Slow Cooking	23%	13%	22%
Steaming	13%	11%	10%
Boiling	9%	5%	6%
Soup	6%	7%	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 31 N=202, Wave 35 N=201, Wave 39 N=200



The importance of provenance has again increased this wave, which now sits slightly above the Vegetable Average. Knowing that eggplants are grown in Australia remains important information for consumers.



Q14. When purchasing Eggplant, how important is Provenance to you?
Q15. And when purchasing Eggplant, how important is that it is grown in Australia?
Sample Wave 31 N=202, Wave 35 N=201, Wave 39 N=200



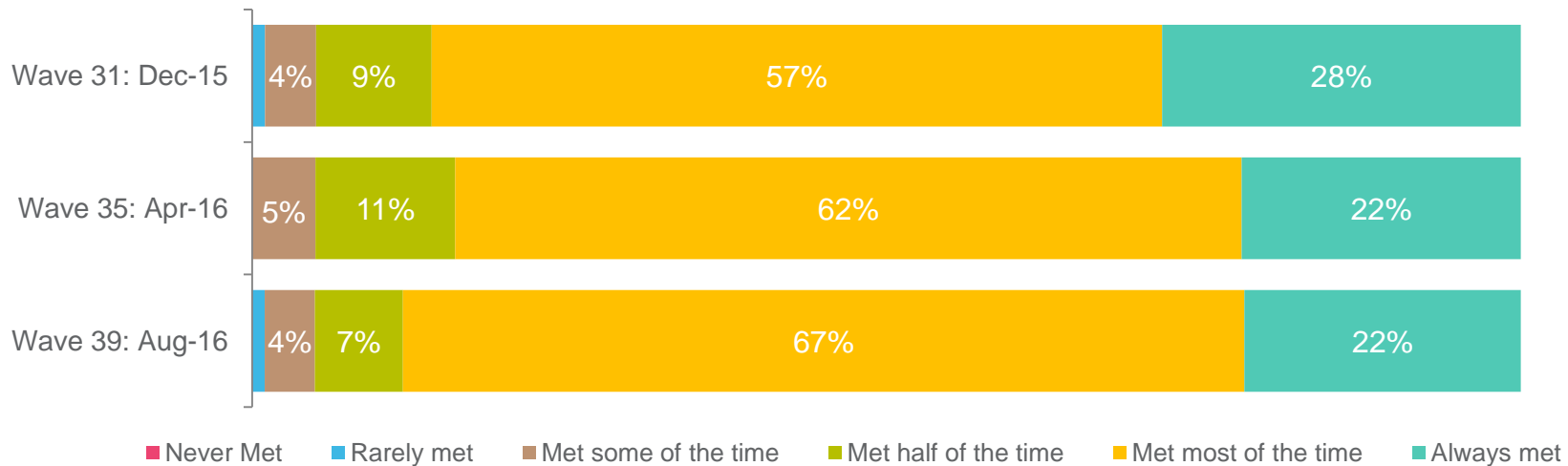
Consumers expect eggplant to remain fresh for just over one week once purchased, slightly increasing in Wave 39. Expectations of freshness are predominantly being met most of the time, with these expectations improving this wave.

Expected to stay fresh for 8.1 days

▼ 7.6 days, Wave 31

▼ 7.6 days, Wave 35

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 31 N=202, Wave 35 N=201, Wave 39 N=200



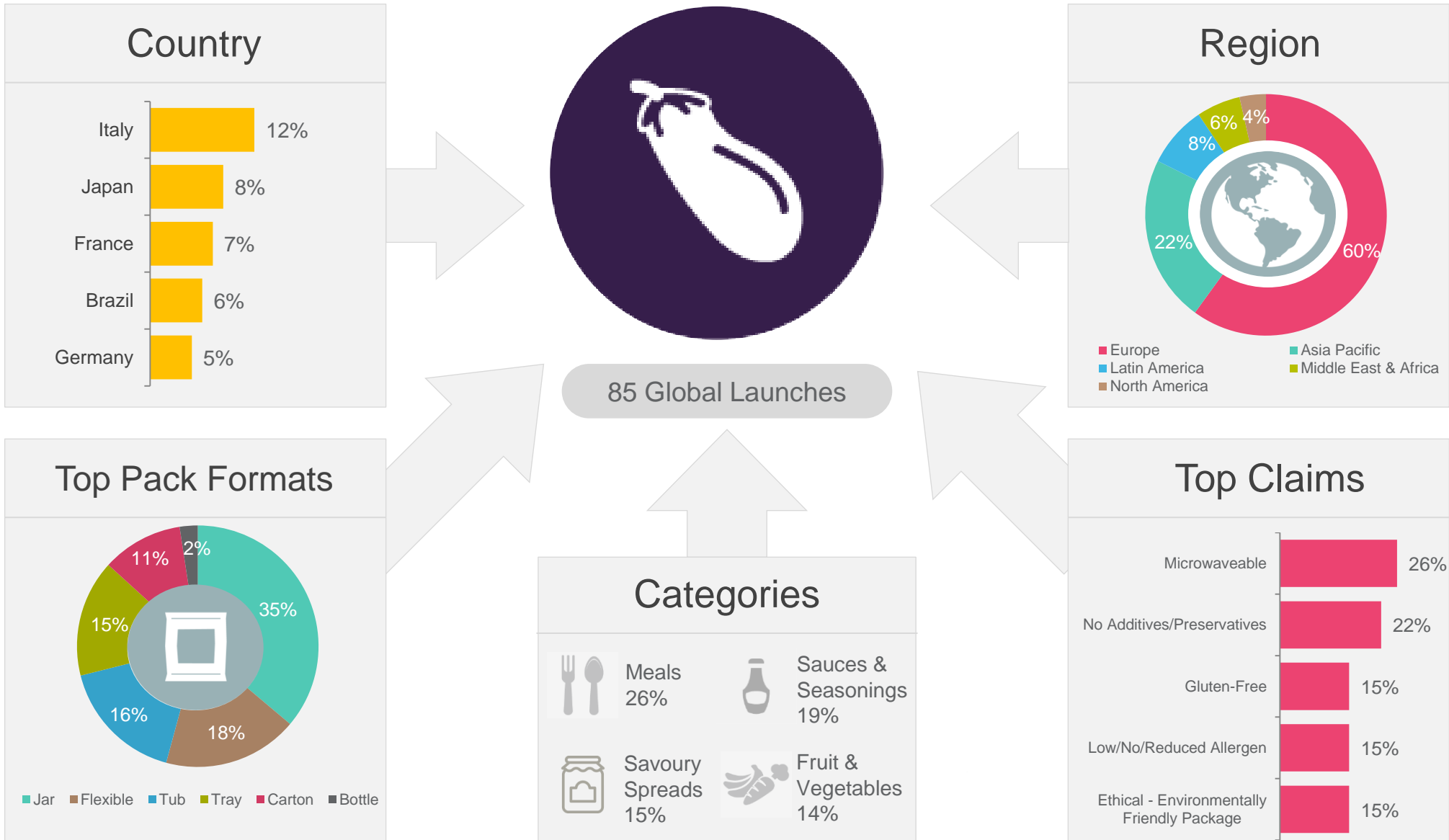
Trends: Eggplant



Eggplant Global Launches

May – August 2016

There were 85 products that contained eggplant as an ingredient launched globally over the last three months. The majority of those launches occurred in Europe. Products launched include meals, sauces, and savoury spreads.





Eggplant Product Launches: Last 3 Months (May – August 2016) Summary

- There were 85 eggplant products launched globally in the last three months.
- There were three products launched in Australia this wave.
- The majority of eggplant launches occurred in Europe (60%) and Asia Pacific (22%).
- Categories for launches were meals (26%), sauces and seasonings (19%), and savoury spreads (15%).
- Key claims used on products included microwaveable (26%), no additives/preservatives (22%) and gluten-free (15%).
- A variety of packaging formats were used including jars (35%), flexible packaging (18%) and tubs (16%).
- The most innovative launch this wave included Eggplant Capsules from Brazil and Sliced Grilled Eggplants from Italy (other examples can be found in the following pages).



Source: Mintel (2016)

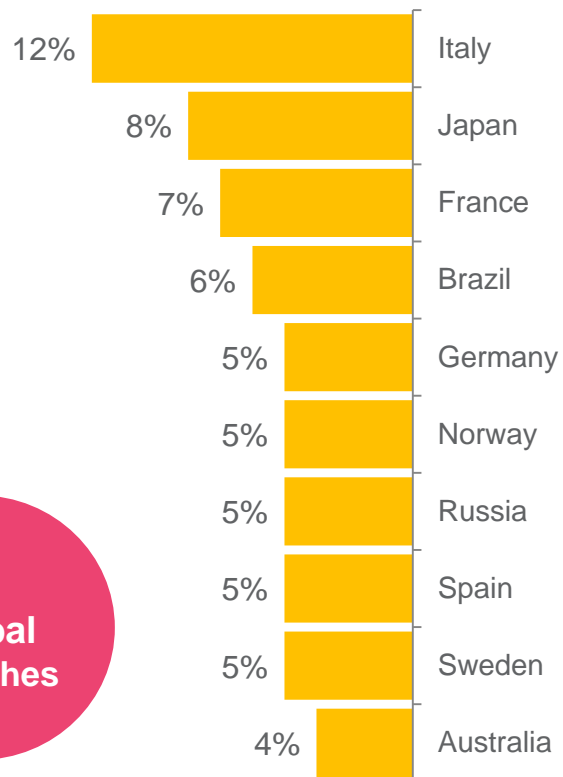




Eggplant Launches

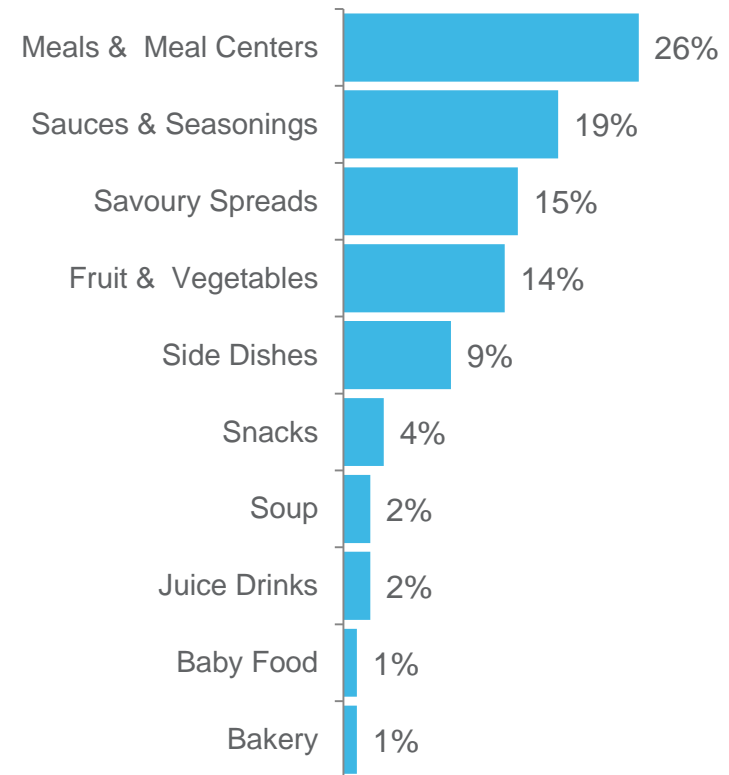
- Countries with the greatest number of launches were Italy, Japan and France.
- Products launched were primarily meals, sauces, savoury spreads and fruits & vegetables.

Top Launch Countries



**85
Global
Launches**

Top Launch Categories





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

Pack Formats Used

Global		Jar	35%
		Flexible	18%
		Tub	16%
Europe		Jar	39%
		Flexible	20%
		Carton	16%

Top Claims Used

Global		Microwaveable	26%
		No Additives/Preservatives	22%
		Gluten-Free	15%
Europe		Microwaveable	20%
		Ethical - Environmentally Friendly Package	16%
		No Additives/Preservatives	14%

»»» Innovative Eggplant Launches: L3M (May – August 2016)

Eridanous Aubergines in Tomato Sauce (Germany)

Eridanous Aubergines in Tomatensauce (Aubergines in Tomato Sauce) have been repackaged in a newly designed pack. The original Greek, sterilised and ready-to-serve product can be enjoyed as a starter or appetiser, and retails in a 280g pack.



Claims:
Ease of Use

Senfas Aubergine Caviar (France)

Senfas Caviar d'Aubergines (Aubergine Caviar) has been reformulated with a new recipe. It is 100% from the south and is said to provide a pleasant flavour. The organic certified product retails in a 90g pack bearing the AB and EU Green Leaf logos.



Claims:
Organic

Iposea Le Specialità Seasoned Aubergines in Sunflower Oil (Italy)

Iposea Le Specialità Melanzane Trifolate in Olio di Semi di Girasole (Seasoned Aubergines in Sunflower Oil) is now available. This gluten free product retails in a 280g jar.



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

Campo Verde Eggplant Flour (Brazil)

Campo Verde Farinha de Berinjela (Eggplant Flour) has been added to the range. The gluten-free product is retailed in a 100g pack featuring a recipe suggestion.



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

»»» Innovative Eggplant Launches: L3M (May – August 2016)

Nichirei Dried Curry Rice with Pork & Aubergines (Japan)

Nichirei Dried Curry Rice with Pork & Aubergines is a new limited edition variety. This microwaveable product is made with domestic first grade rice, 17 types of spices and chunky vegetables including fried aubergines, and retails in a 430g pack featuring a QR code. Launched on May 1, 2016, open priced.



Claims:
Microwaveable, Limited Edition

Trop Bien! Ratatouille with Grilled Courgettes (France)

Trop Bien! Ratatouille aux Courgettes Grillées (Ratatouille with Grilled Courgettes) is now available. This gourmand recipe product is made in France with 100% natural ingredients, and is said to only need reheating. It is ideal with grilled meats and fish, free from preservatives and colouring, and can be microwaved in two to three minutes. The product retails in a 330g partly recyclable pack containing two portions and bearing the Facebook logo.



Claims:
No Additives/Preservatives, All Natural Product, Microwaveable, Ethical - Environmentally Friendly Package, Ease of Use, Social Media

Tutti Pasta Vegetable Stew (Spain)

Tutti Pasta Menestra Huerta Navarra (Vegetable Stew) is now available. The product can be heated in the microwave in five minutes and retails in a 300g pack.



Claims:
Microwaveable

Coop Sliced Grilled Eggplants (Italy)

Coop Melanzane a Fette Grigliate e Surgelate (Sliced Grilled Eggplants) have been relaunched with a new pack and a new brand name, previously known as Coop Soluzioni. The product contains 100% Italian eggplants that are harvested when well ripened, for then being processed, sliced, grilled and quickly frozen. It is suitable for microwave, can be used to prepare parmigiana or any other dishes, and retails in a 450g pack, featuring cooking instructions.



Claims:
Microwaveable, Ethical - Human

»»» Innovative Eggplant Launches: L3M (May – August 2016)

Sunflower Eggplant Capsules (Brazil)

Sunflower Berinjela em Cápsulas (Eggplant Capsules) are made with dry eggplant extract with origin guarantee. Eggplant is rich in proteins, vitamins A, B1, B2, B5 and C and minerals such as calcium, phosphorus, iron, potassium and magnesium. The gluten-free product provides maximum absorption and retails in a pack containing 60 capsules of 500mg each.



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

Grill Party Mediterranean Quark Cream with Aubergine & Feta (Germany)

Grill Party Mediterrane Quarkcrème mit Aubergine & Feta (Mediterranean Quark Cream with Aubergine & Feta) is a combination of quark with PDO feta and aubergine. This half fat product is said to be ideal as a dip, on bread or as a seasoning, and retails in a 200g pack.



Claims:
Low/No/Reduced Fat

Tensei Eggplant and Quinoa Burger (Brazil)

Tensei Hambúrguer de Berinjela e Quinoa (Eggplant and Quinoa Burger) is now available. The product is gluten-free, does not contain animal ingredients, and retails in a 230g pack, featuring a Facebook link.



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

Les Niçois Aubergine Spread (France)

Les Niçois Aubergines (Aubergine Spread) is now available. This artisanal product is made in France and is free from colouring, artificial flavouring and gluten. It retails in an 80g pack.



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



Australian Eggplant Launches: L3M (May – August 2016)

Pilpel Eggplant Hummous Dip

Pilpel Eggplant Hummous Dip has been repackaged with an updated product name and was previously known as Baba Hummous. The dip is free from gluten, dairy, preservatives, artificial colours and artificial flavours. The kosher certified product retails in a 200g tub bearing the Facebook logo.



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

Fodmapped For You! Tomato Pasta Sauce with Slow Roasted Vegetables

Fodmapped For You! Tomato Pasta Sauce with Slow Roasted Vegetables is suitable for vegetarians. The microwavable product is 98% fat free and free from gluten, added MSG, artificial colours, flavours, preservatives, garlic and onions. It is a source of fibre and retails in a 375g pack, providing two servings and featuring the Fodmap Friendly, Facebook and Instagram logos.



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

Mama's Home Style Ajvar

Mama's Home Style Ajvar is now available. This Macedonian paprika relish is made from roasted peppers, roasted eggplant, sunflower oil and sea salt, and is free from preservatives, artificial colours or additives. This kosher and halal certified product retails in 290g pack.



Claims:
No Additives/Preservatives, Kosher, Halal

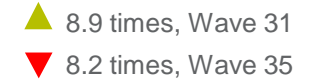
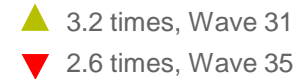
A close-up photograph of several green spring onions, showing their long, pointed leaves and the white bulbous base. The image is slightly blurred, focusing on the texture and color of the vegetable.

Spring Onion.

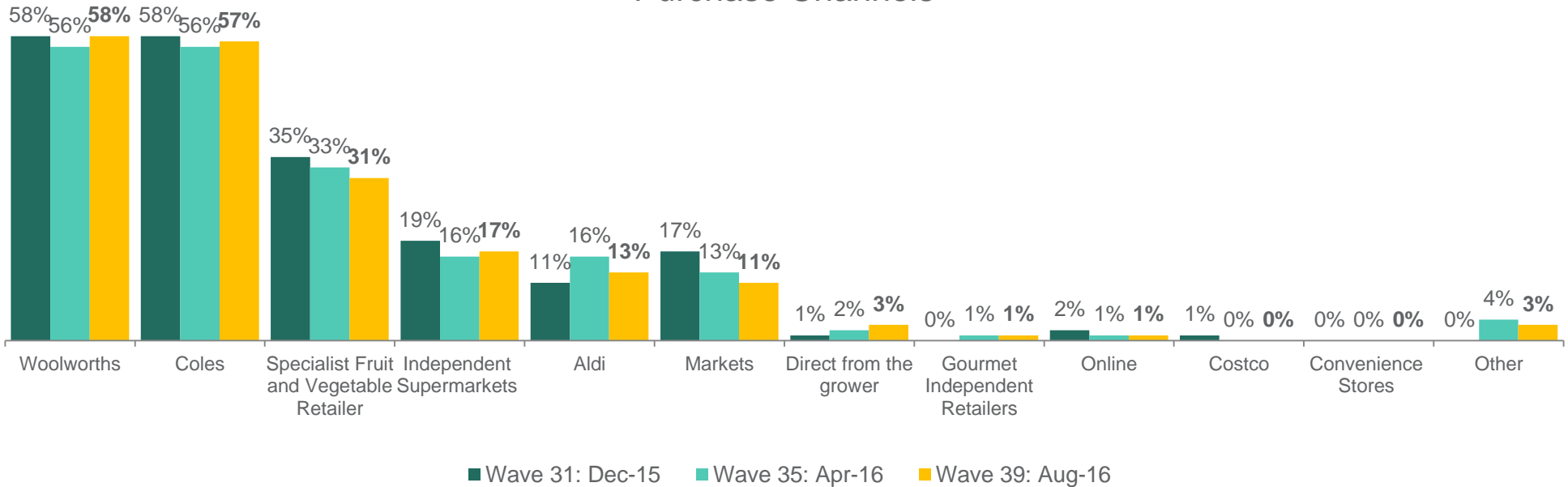


Both purchase and consumption frequency have increased this wave.

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



Purchase Channels



Q1. On average, how often do you purchase Spring Onion?
 Q2. On average, how often do you consume Spring Onion?
 Q5. From which of the following channels do you typically purchase Spring Onion?
 Sample Wave 31 N=202, Wave 35 N=204, Wave 39 N=202



Average Spend and Price Sensitivity



Average weight of purchase

The average consumer typically purchases **400g** of spring onions, relatively consistent with past waves.

- 400g, Wave 31
- ▼ 300g, Wave 35



Recalled last spend

Recalled last spend on spring onions was **\$2.50**, which is slightly higher than the previous wave.

- ▲ \$2.80, Wave 31
- ▼ \$2.40, Wave 35



Value for money

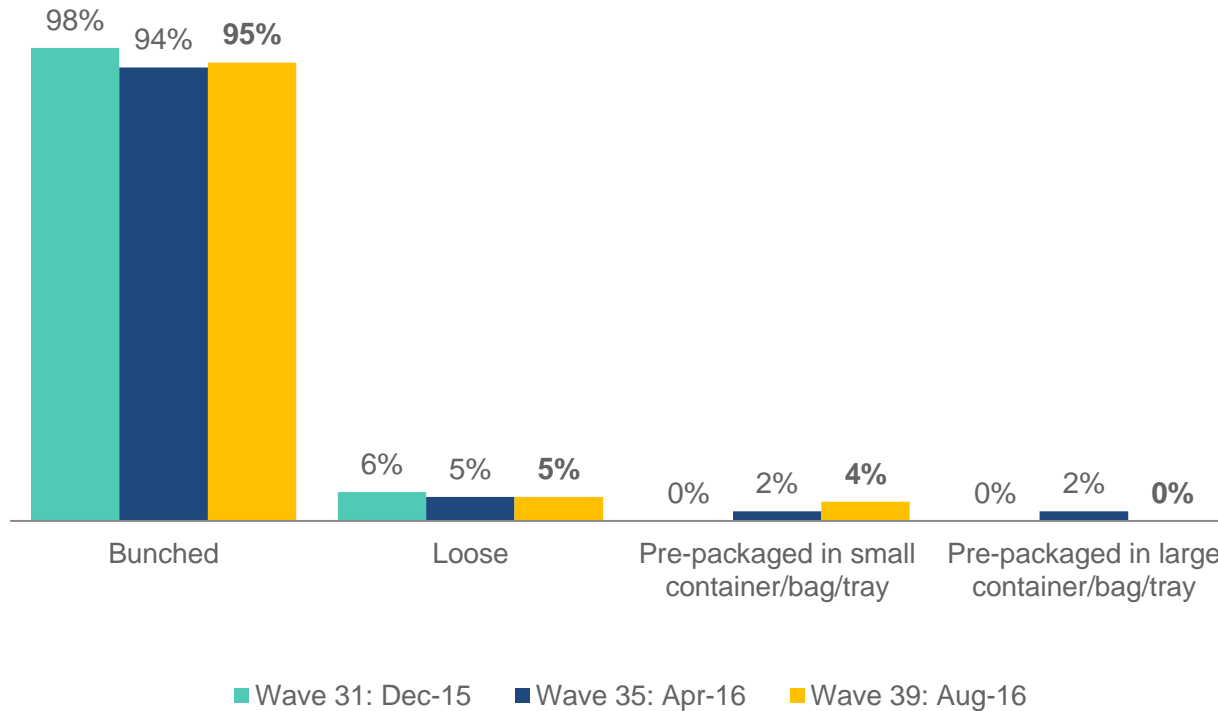
Consumers' perceived value for money is fair for spring onions (**6.2/10**), consistent with the previous wave.

- ▼ 6.1/10, Wave 31
- 6.2/10, Wave 35

Q3. How much Spring Onion do you typically purchase when you shop for it?
 Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
 Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
 Sample Wave 31 N=202, Wave 35 N=204, Wave 39 N=202



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

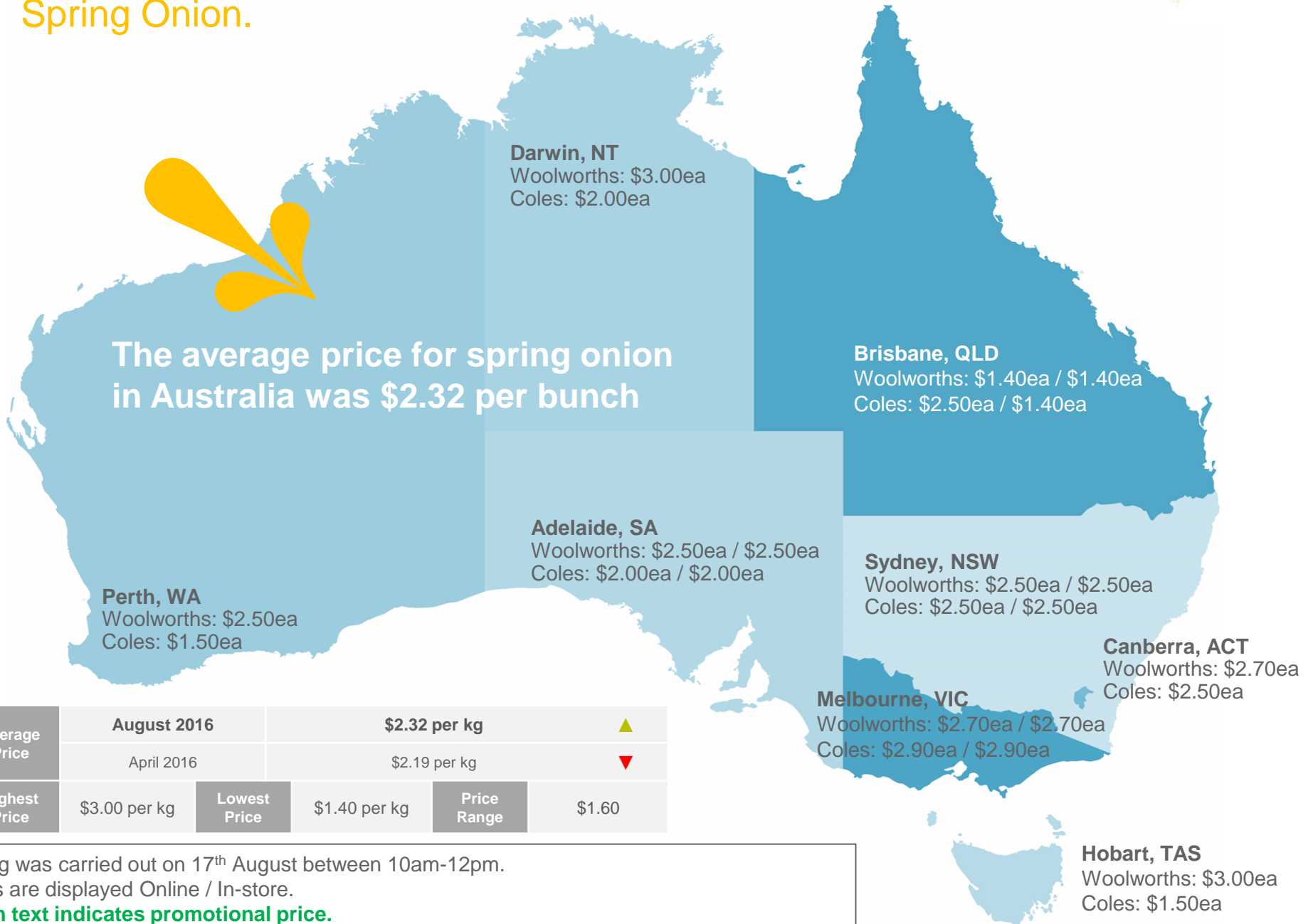


Q4b In what fresh formats do you typically purchase Spring Onion?
Sample Wave 31 N=202, Wave 35 N=204, Wave 39 N=202



Online and In-store Commodity Prices.

Spring Onion.



Average Price	August 2016	\$2.32 per kg		▲	
	April 2016	\$2.19 per kg		▼	
Highest Price	\$3.00 per kg	Lowest Price	\$1.40 per kg	Price Range	\$1.60

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



Awareness of spring onion varieties remains low, with 84% of consumers unable to recall a type.

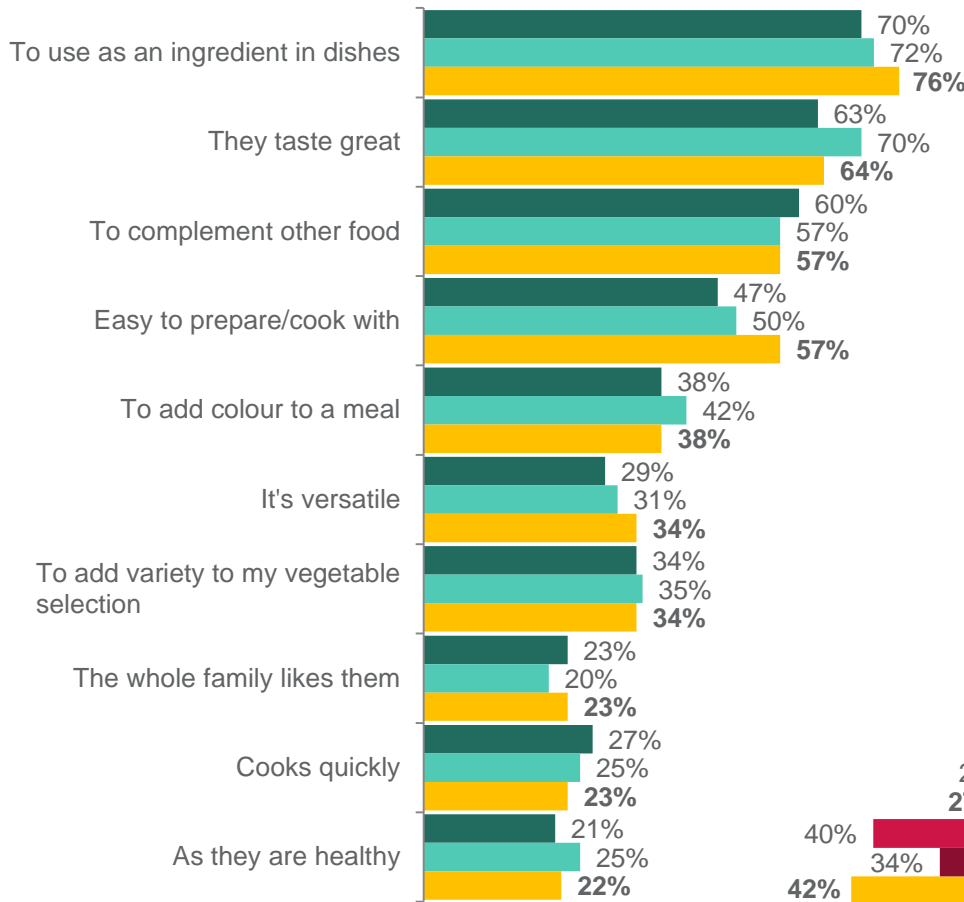




Using spring onion as an ingredient in dishes, tasting great and complementing other foods are the key drivers of purchase. In contrast, the key barriers are not wanting to waste any, already consuming enough to balance their diet and price. Ease of preparation has increased as a trigger to purchase over the last three waves.

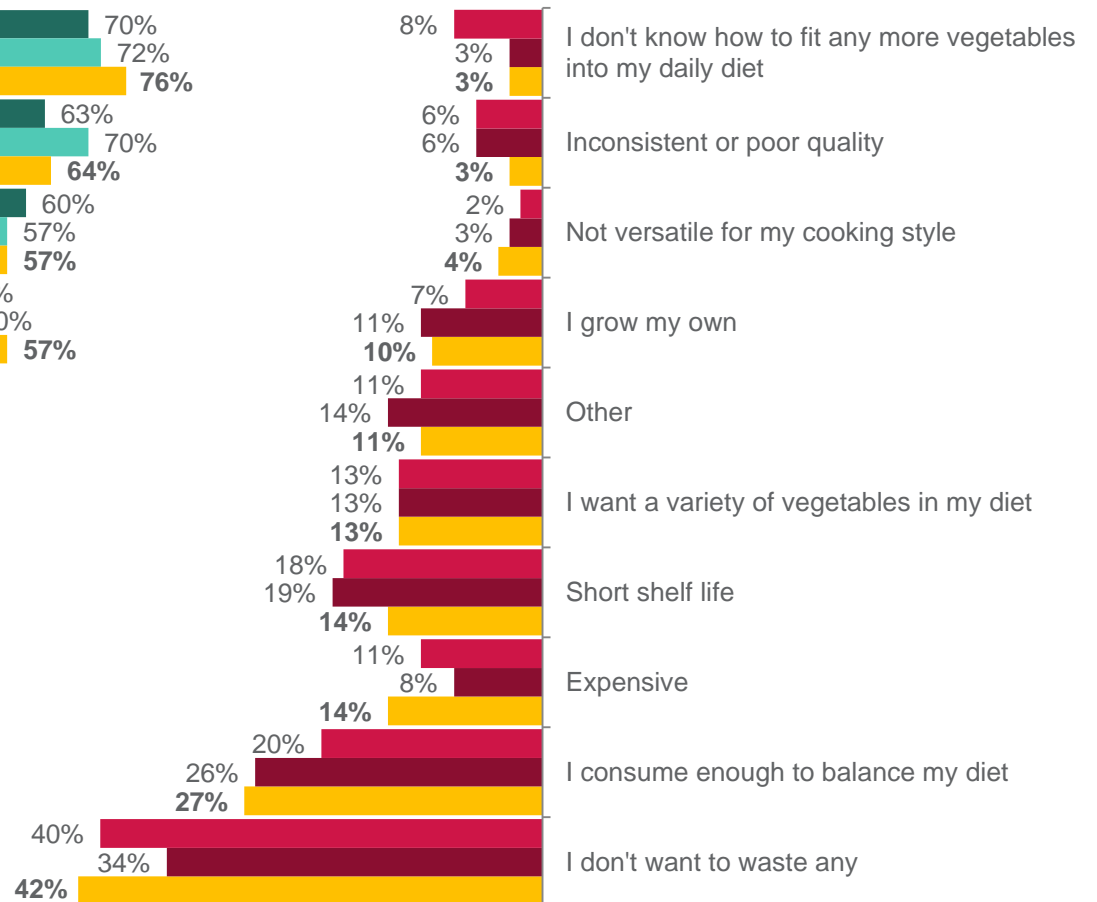


Triggers



■ Wave 31: Dec-15 ■ Wave 35: Apr-16 ■ Wave 39: Aug-16

Barriers



■ Wave 31: Dec-15 ■ Wave 35: Apr-16 ■ Wave 39: Aug-16

Q7. Which of the following reasons best describes why you purchase Spring Onion?
 Q8. Which reason best describes why you don't buy Spring Onion more often?
 Sample Wave 31 N=202, Wave 35 N=204, Wave 39 N=202



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

Meal occasions tend to occur at dinner.

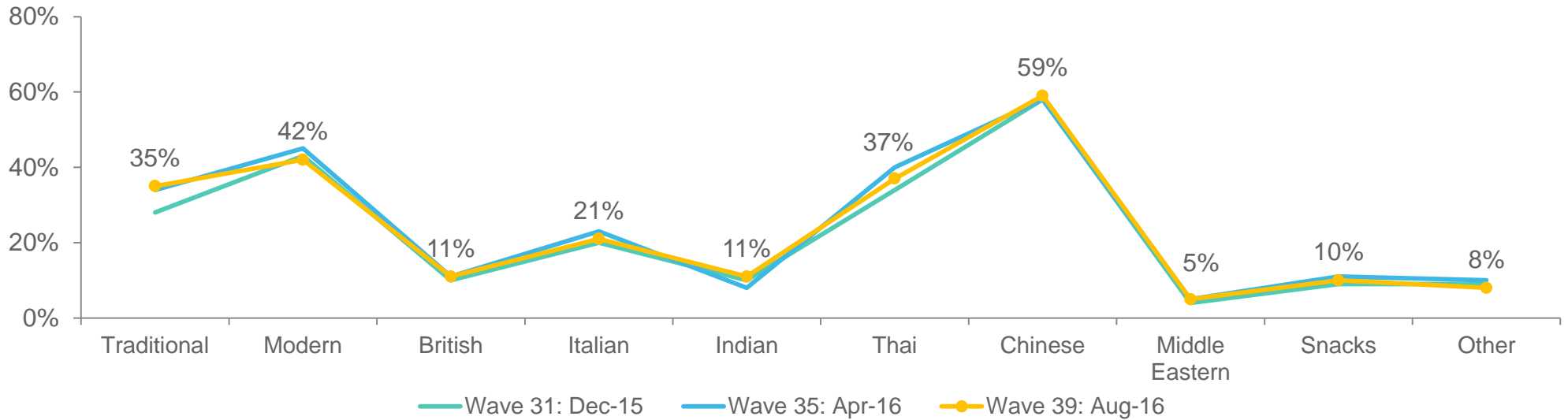
Top 5 Consumption Occasions

	Wave 35	Wave 39
Dinner	72%	69%
Family meals	56%	60%
Quick Meals	52%	52%
Weekday meals	42%	44%
Weekend meals	39%	41%

23% used spring onions when cooking a new recipe

▲ 28%, Wave 35

Typical Cuisine Cooked



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

Q10. What cuisines do you cook/consume that use Spring Onion?
 Q11. Which of the following occasions do you typically consume/use Spring Onion?
 Sample Wave 31 N=202, Wave 35 N=204, Wave 39 N=202

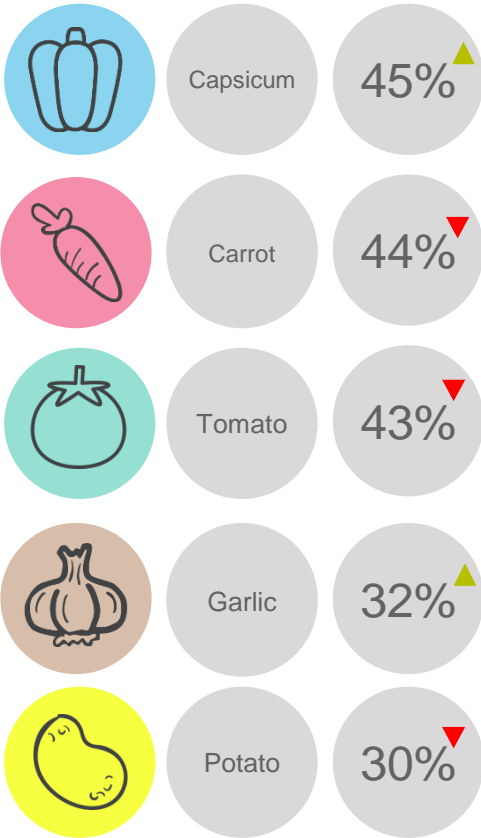


▼: Indicates LOWER score than current wave.
 ▲: Indicates HIGHER score than current wave.



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

Accompanying Vegetables



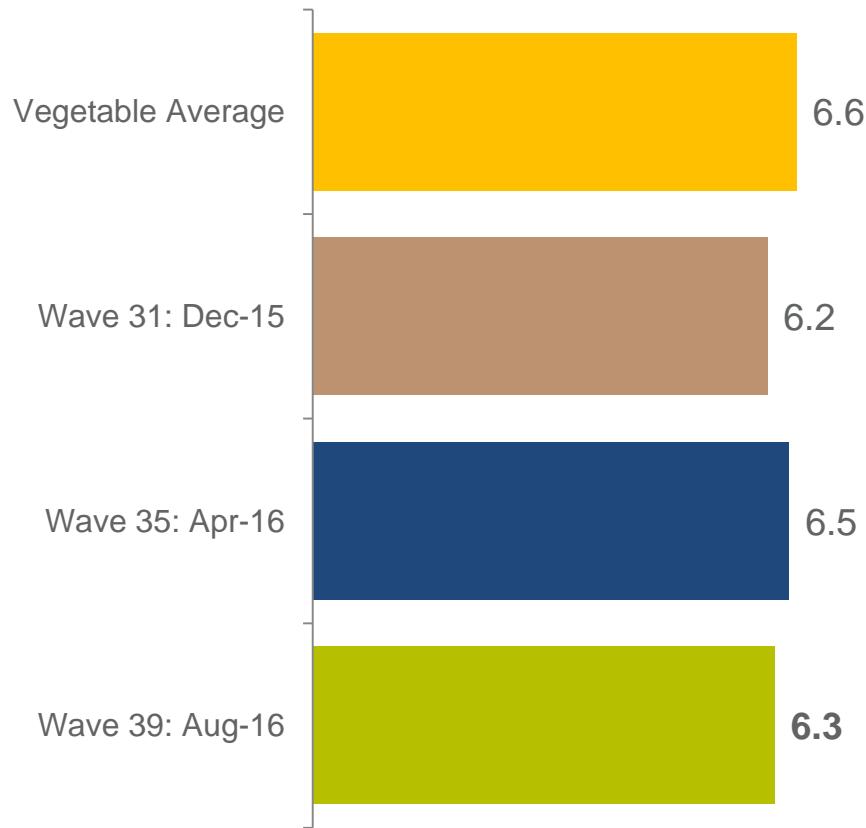
Top Cooking Styles

	Wave 31	Wave 35	Wave 39
Stir frying	69%	72%	74%
Raw	54%	49%	51%
Soup	28%	30%	32%
Sautéing	31%	26%	31%
Frying	30%	22%	30%
Slow Cooking	10%	15%	16%
Baking	5%	8%	7%
Steaming	5%	8%	6%
Roasting	8%	5%	5%
Boiling	5%	3%	5%

Q9. How do you typically cook Spring Onion?
Q10a. And when are you serving Spring Onion which of the following do you also serve together with this?
Sample Wave 31 N=202, Wave 35 N=204, Wave 39 N=202



The importance of provenance slightly declined in Wave 39, sitting below the Vegetable Average. Knowing that spring onions are grown in Australia is still the most important provenance information for consumers.



Q14. When purchasing Spring Onion, how important is Provenance to you?
 Q15. And when purchasing Spring Onion, how important is that it is grown in Australia?
 Sample Wave 31 N=202, Wave 35 N=204, Wave 39 N=202

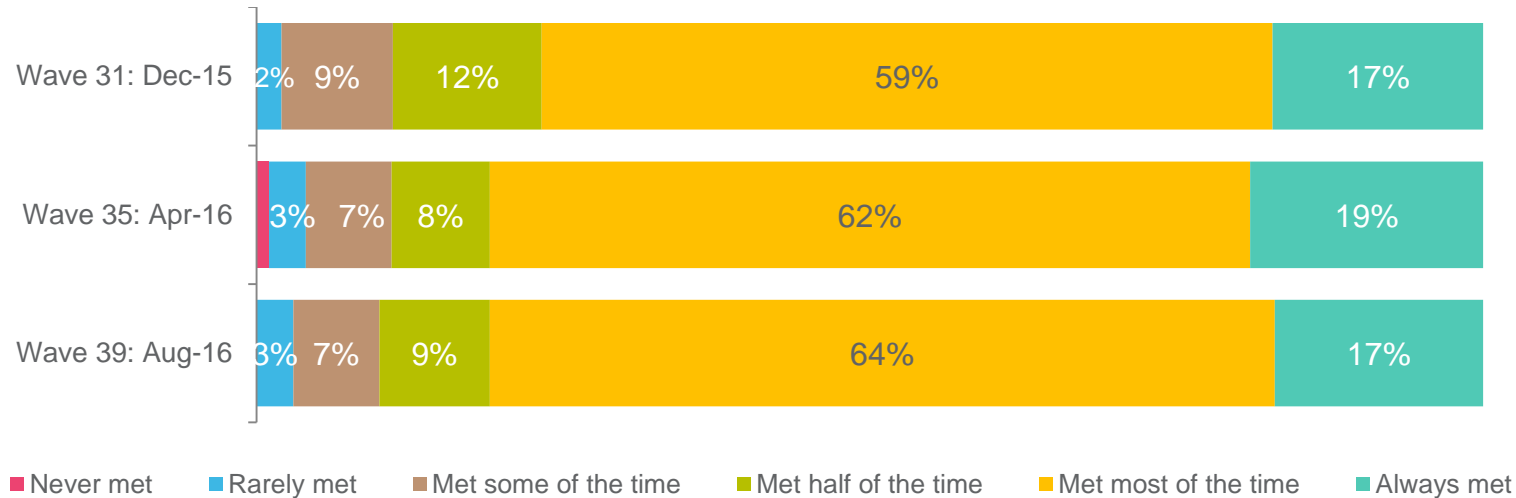


Consumers expect spring onions to remain fresh for around 9 days once purchased, which is being met most of the time.

Expected to stay fresh for 8.9 days

- ▼ 8.6 days, Wave 31
- ▼ 8.8 days, Wave 35

Expectations Met



Q12. How long do you expect Spring Onion to stay fresh for, once you have purchased it?
 Q13. How often is this length of freshness met when you buy Spring Onion?
 Sample Wave 31 N=202, Wave 35 N=204, Wave 39 N=202

A close-up photograph of several green spring onions, showing their long, pointed leaves and the white base. The image is slightly blurred, creating a soft, natural background.

Spring Onion Product Launch Trends.

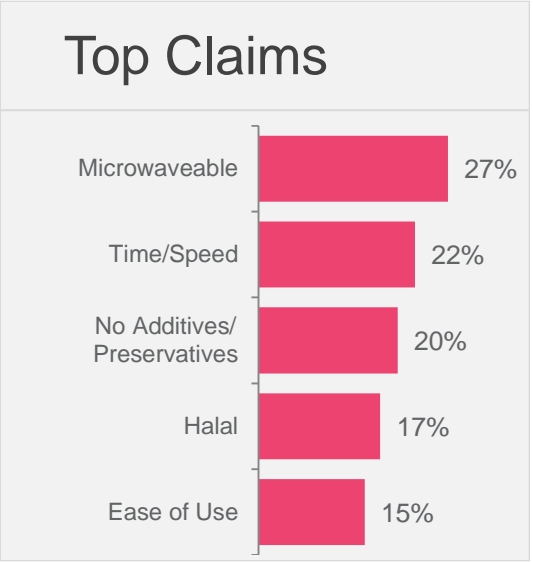
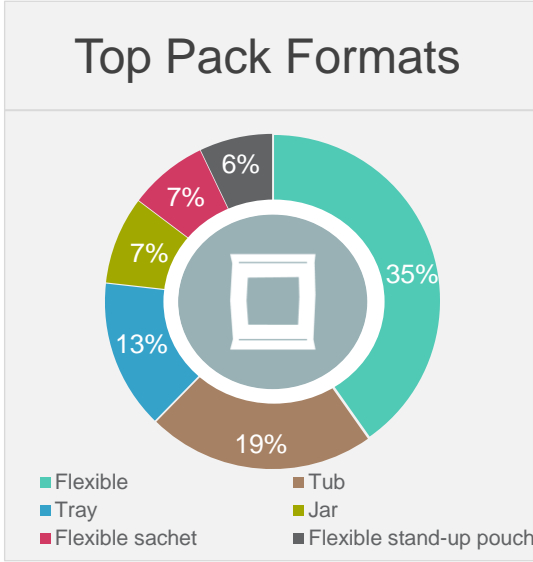
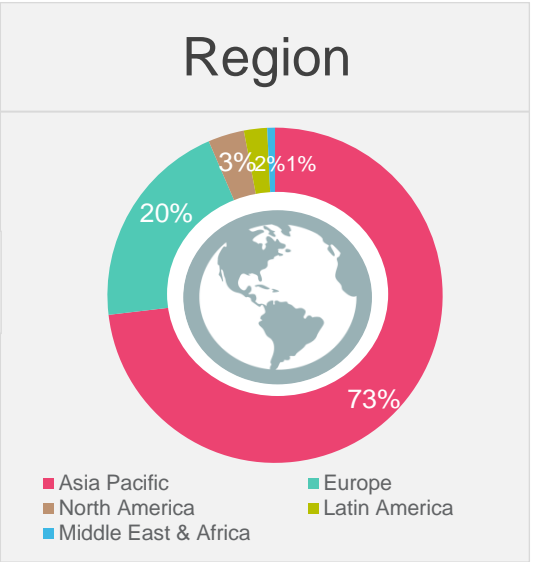
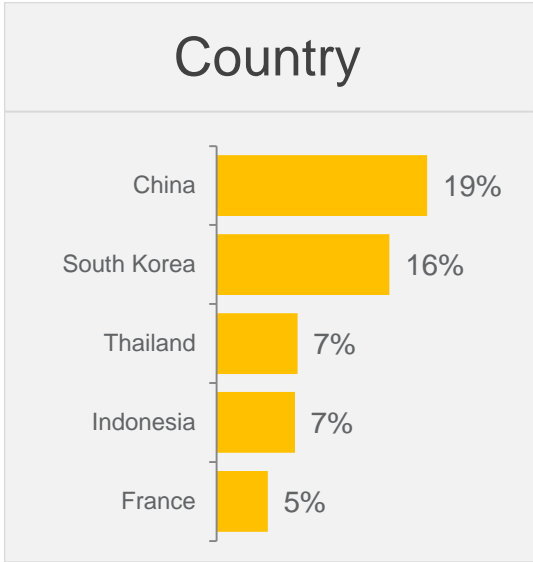
Spring Onion Global Launches

May – August 2016

There were 402 spring onion products launched globally over the last three months. The majority of launches were in China and South Korea. Categories for launches were meals and sauces & seasonings. Key packaging for spring onion products were flexible formats.



402 Global NPDs





Spring Onion Product Launches: Last 3 Months (May – August 2016) Summary

- There were 402 launches in the past 3 months globally that contained spring onions as an ingredient.
- There were 9 products launched in Australia over the past three months.
- Asia Pacific (73%) and Europe (20%) were the key regions for launches.
- Flexible packaging (35%), and tubs (19%) were the most common formats used for products.
- The main categories for launches were meals (44%), seasonings & sauces (18%), and snacks (13%).
- Claims used on products included microwaveable (27%), time/speed (22%), and no additives/preservatives (20%).
- The most innovative product launched was Spring Onion Flavoured Wavy Chips from Czech Republic. Other examples can be found in the following pages.

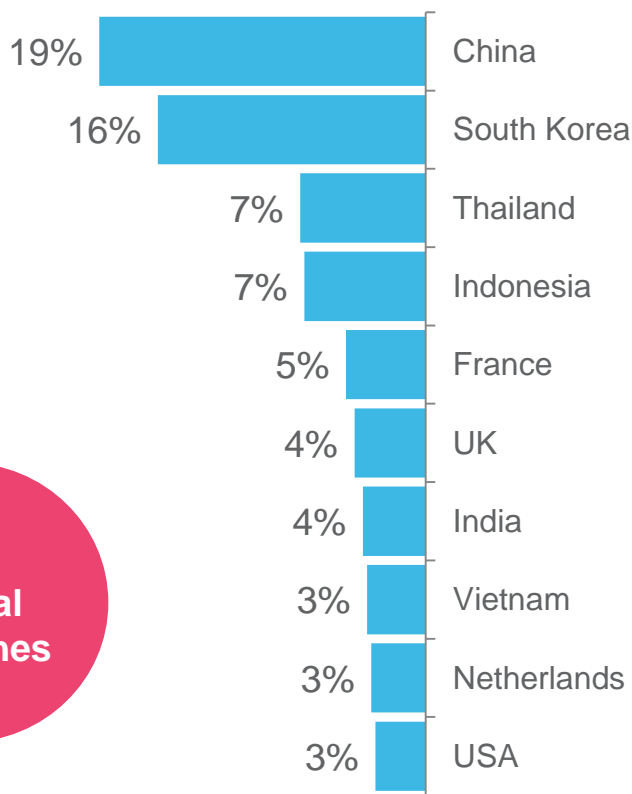


Source: Mintel (2016)

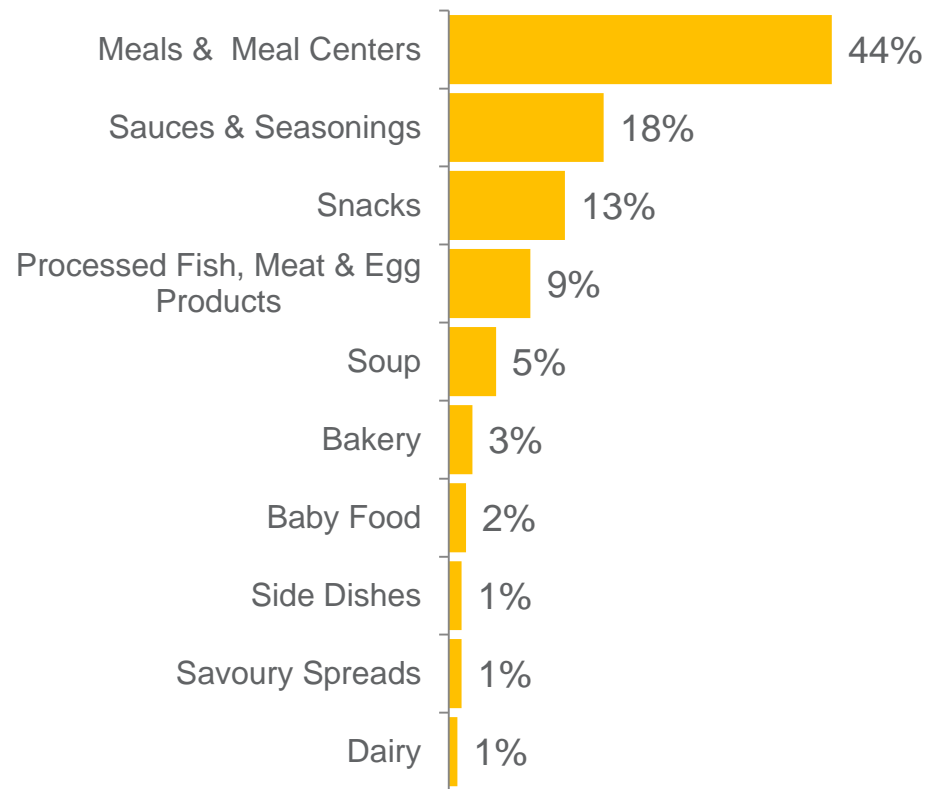


The majority of launches occurred in China and South Korea. The key categories for spring onion launches are meals, sauces & seasonings, snacks, and processed products.

Top Launch Countries



Top Launch Categories












**402
Global
Launches**










»»»→ The main claims globally were microwaveable, time/speed and no additives & preservatives.

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

Pack Formats Used

Global		Flexible	35%
		Tub	19%
		Tray	13%
Asia Pacific		Flexible	40%
		Tub	19%
		Tray	8%
Europe		Tray	28%
		Tub	24%
		Flexible	20%

Top Claims Used

Global		Microwaveable	27%
		Time/Speed	22%
		No Additives/Preservatives	20%
Asia Pacific		Time/Speed	27%
		Microwaveable	26%
		Halal	22%
Europe		Microwaveable	34%
		No Additives/Preservatives	20%
		Ethical - Environmentally Friendly Package	18%

Only regions with n >30 are displayed



Innovative Spring Onion Launches: L3M (May – August 2016)

Tesco Spring Onion Flavoured Wavy Chips (Czech Republic)

Tesco Vroubkované Smazené Bramborové Lupínky s Príchutí Jarní Cibulky (Spring Onion Flavoured Wavy Chips) are now available. The product retails in a 130g pack.



Claims:
N/A

Shinsegae Food Olbaan Korean Meat Pancake (South Korea)

Shinsegae Food Olbaan Korean Meat Pancake is made with 63.48% Korean pork and 9.77% Korean beef. The product contains added extra meat, has a succulent chewy texture and is free from artificial sweetener, colourings or flavourings, potassium aluminium sulfate, d-sorbitol solution, starch and sodium nitrite. It is ready in five minutes and retails in a 350g pack.



Claims:
No Additives/Preservatives,
Low/No/Reduced Sodium, Low/No/Reduced Allergen

Sapporo Ichiban x Zenno Cup Star Potato & Butter Flavour Salt Ramen Noodles (Japan)

Sapporo Ichiban x Zenno Cup Star Potato & Butter Flavour Salt Ramen Noodles are now available. They feature toppings of potatoes from Hokkaido, corn, carrots and spring onion, supple noodles and a salt and butter flavoured soup. This product retails in a 69g pack. Launched on July 25, 2016 with an RRP of 194 yen.



Claims:
N/A

Myojo Lemongrass & Coriander Shrimp Wonton Soup (Japan)

Myojo Lemongrass & Coriander Shrimp Wonton Soup is supervised by Mango Tree Tokyo and features clear wontons with a shrimp filling. This product retails in a 20g pack. Launched on July 4th 2016 with an RRP of 172 yen.



Claims:
N/A



Innovative Spring Onion Launches: L3M (May – August 2016)

Elise & Felicie Wine Vinegar with Shallot (France)

Elise & Felicie Vinaigre de Vin à l'Échalote (Wine Vinegar with Shallot) is hand crafted and said to be aged in oak barrels to develop all its flavours. The long maceration period of fresh shallots gives sumptuous flavours to seafood, courts bouillons, dressings, sauces and deglazing. This product retails in a 25cl bottle.



Claims:
N/A

Sainsbury's Thai Penang Chicken Curry (UK)

Sainsbury's Thai Penang Chicken Curry comprises roast chicken in a fragrant coconut, lime and lemongrass curry sauce with crunchy vegetables and sticky jasmine rice. It has a spice rating of one, is made with British chicken, and is suitable for microwave cooking. It retails in a 380g partly recyclable pack containing one serving.



Claims:
Microwaveable, Ethical - Environmentally Friendly Package

Lay's Spring Onion & Cheese Flavoured Potato Chips (South Africa)

Lay's Spring Onion & Cheese Flavoured Potato Chips are now available in a newly designed 200g party bag featuring the chance to win tickets for the UEFA Champions League. This product is halal certified and bears the KEBS certified logo on the pack.



Claims:
Halal, Event Merchandising

Wok Laune Chicken Cashew Wok Kit (Germany)

Wok Laune Wokgericht Hahnchen Cashew (Chicken Cashew Wok Kit) is a complete meal kit comprising of all the fresh ingredients including ready marinated chicken cubes, yellow rice, Asiatic vegetables, a sachet of Teriyaki sauce and cashews in a separate sachet. This product retails in a 700g featuring the FSC mix logo



Claims:
Ethical - Environmentally Friendly Package, Ease of Use



Innovative Spring Onion Launches: L3M (May – August 2016)

Glico Bei Xiang Pretz Garlic Olive Oil Flavoured Biscuit Sticks (China)

Glico Bei Xiang Pretz Suan Xiang Gan Lan You Wei Zhuang Shi Bing Gan (Garlic Olive Oil Flavoured Biscuit Sticks) are made using imported olive oil from Spain. This product retails in a 50g pack featuring the WeChat code.



Claims:
Social Media

Ocean Bella Barramundi Fillet with Authentic Thai Sweet Chilli Sauce (Singapore)

Ocean Bella Barramundi Fillet with Authentic Thai Sweet Chilli Sauce is a ready-to-cook product with an Asian flavour, no cholesterol, earthy taste, added preservatives or artificial colouring. It said to provide great nutrition, restaurant cuisine at home, delectable seafood goodness and pleasure from ease of preparation. This specially selected and responsibly farmed fish has a firm, moist, white-pinkish flesh with a buttery flavour and succulent texture.



Claims:
No Additives/Preservatives, Low/No/Reduced Cholesterol, Microwaveable, Halal, Ethical - Environmentally Friendly Product, Ethical - Animal, Ease of Use

Big Fish Brand Smoked Haddock Luxury Fish Cakes with Spring Onion & Cheese (UK)

Big Fish Brand Smoked Haddock Luxury Fish Cakes with Spring Onion & Cheese are made with responsibly sourced haddock and are described as smoked haddock blended with potato, spring onions and cheese lightly seasoned and coated in a golden breadcrumb. This product retails in a 170g pack.



Claims:
Ethical - Environmentally Friendly Product

Synear Zhonghua Miandian Twisted Roll with Spring Onion Oil (China)

Synear Zhonghua Miandian Cong You Hua Juan (Twisted Roll with Spring Onion Oil) has been relaunched with a new brand name, which was previously known as Synear Zao 8 Dian, and is reformulated with active yeast to provide a softer texture. This microwaveable product is processed according to the PLC system to control the temperature and moisture precisely, and retails in a newly designed 960g pack.



Claims:
Microwaveable



Australian Spring Onion Launches: L3M (May – August 2016)

Weight Watchers Gourmet Menu Mango Coconut Chicken

Weight Watchers Gourmet Menu Mango Coconut Chicken is now available. The product comprises slices of marinated chicken breast in a mango purée, coconut milk, sweet chilli, garlic and curry sauce, served with a combination of steamed long grain rice, wild rice, corn, sliced green and red capsicum, and finished with a sprinkle of chopped chives and red pepper flakes. It is low in sugar, 97% fat free, and contains no preservatives, added colours or flavours.



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

Yoodles Brown Rice Noodles with Chicken Flavour

Yoodles Brown Rice Noodles with Chicken Flavour are now available. These noodles are high in wholegrain and contain no artificial colours, flavours, preservatives or added MSG. The gluten-free product retails in 70g pack with fork included.



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

Campbell's Real Soup Base Chinese Soup Base

Campbell's Real Soup Base Chinese Soup Base is now available. This beef stock infused with Chinese five spice, onion, soy bean paste and soy sauce. It just needs the addition of rump steak, kokkien noodles, bok choy, and spring onions. This 100% natural product contains no added preservatives, is 99% fat-free, and retails in a 1L pack that features recipe suggestions.



Claims:
No Additives/Preservatives, All Natural Product, Low/No/Reduced Fat, Ease of Use

Good Mood Food Fresh Chicken Vietnamese Spring Rolls

Good Mood Food Fresh Chicken Vietnamese Spring Rolls are now available. The gluten-free product has no preservatives, artificial colours or flavourings. These spring rolls, made by hand from locally sourced ingredients, retail in a 200g pack, containing four units.



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



Radish.





Radish is purchased on average five times per month, which has consistently increased over the last three waves.

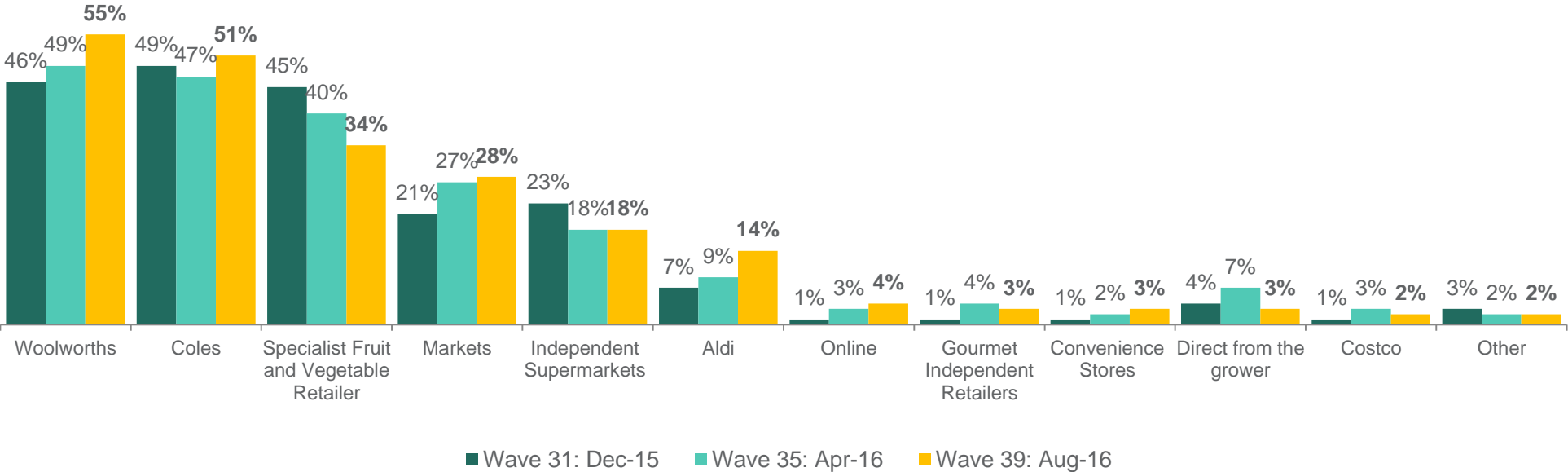
Radish is generally purchased from mainstream retailers such as Woolworths and Coles. Purchase from specialist vegetable retailers has continued to trend downwards.



▼ 3.2 times, Wave 31
 ▼ 3.9 times, Wave 35

▼ 9.4 times, Wave 31
 ▲ 9.8 times, Wave 35

Purchase Channels



Q1. On average, how often do you purchase Radish?
 Q2. On average, how often do you consume Radish?
 Q5. From which of the following channels do you typically purchase Radish?
 Sample Wave 31 N=202, Wave 35 N=202, Wave 39 N=202



Average Spend and Price Sensitivity



Average weight of purchase

The average consumer typically purchases **700g** of radish, increasing over the last three waves.

- ▼ 500g, Wave 31
- ▼ 600g, Wave 35



Recalled last spend

Recalled last spend on radish was **\$4.20**, which has trended upwards since Wave 31.

- ▼ \$3.00, Wave 31
- ▼ \$3.30, Wave 35



Value for money

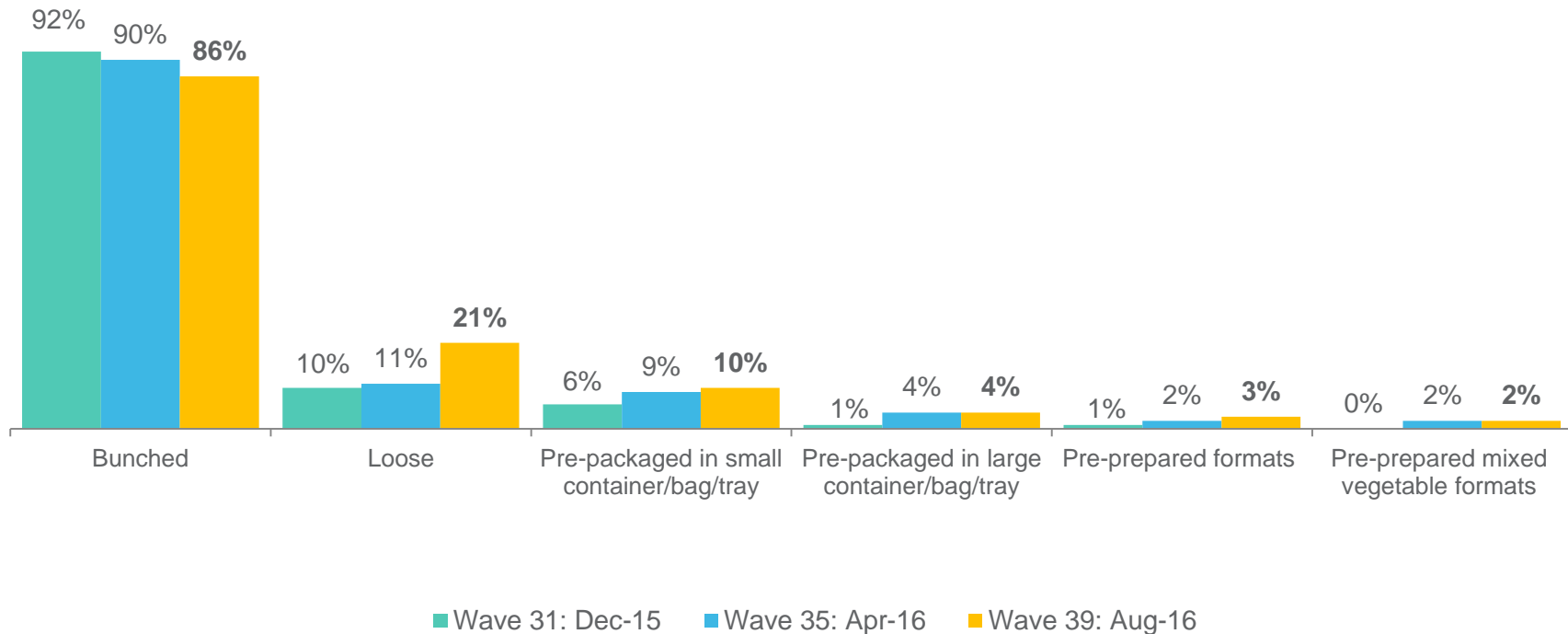
Consumers' perceived value for money is fair for radish (**6.4/10**), relatively consistent with past waves.

- ▼ 6.3/10, Wave 31
- ▼ 6.3/10, Wave 35

Q3. How much Radish do you typically purchase when you shop for it?
 Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
 Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
 Sample Wave 31 N=202, Wave 35 N=202, Wave 39 N=202



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

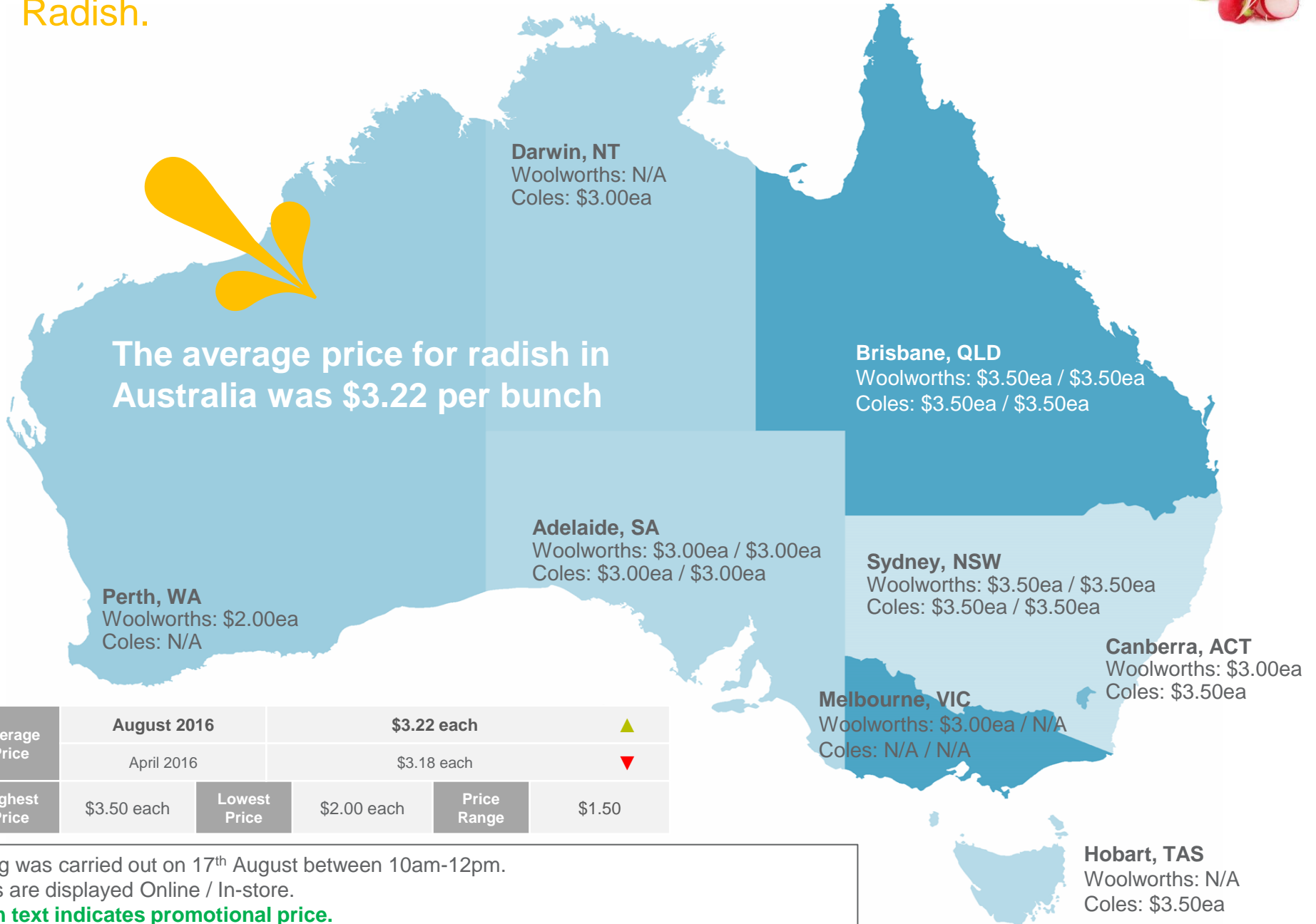


Q4b In what fresh formats do you typically purchase Radish?
Sample Wave 31 N=202, Wave 35 N=202, Wave 39 N=202



Online and In-store Commodity Prices.

Radish.



Average Price	August 2016	\$3.22 each		▲	
	April 2016	\$3.18 each		▼	
Highest Price	\$3.50 each	Lowest Price	\$2.00 each	Price Range	\$1.50

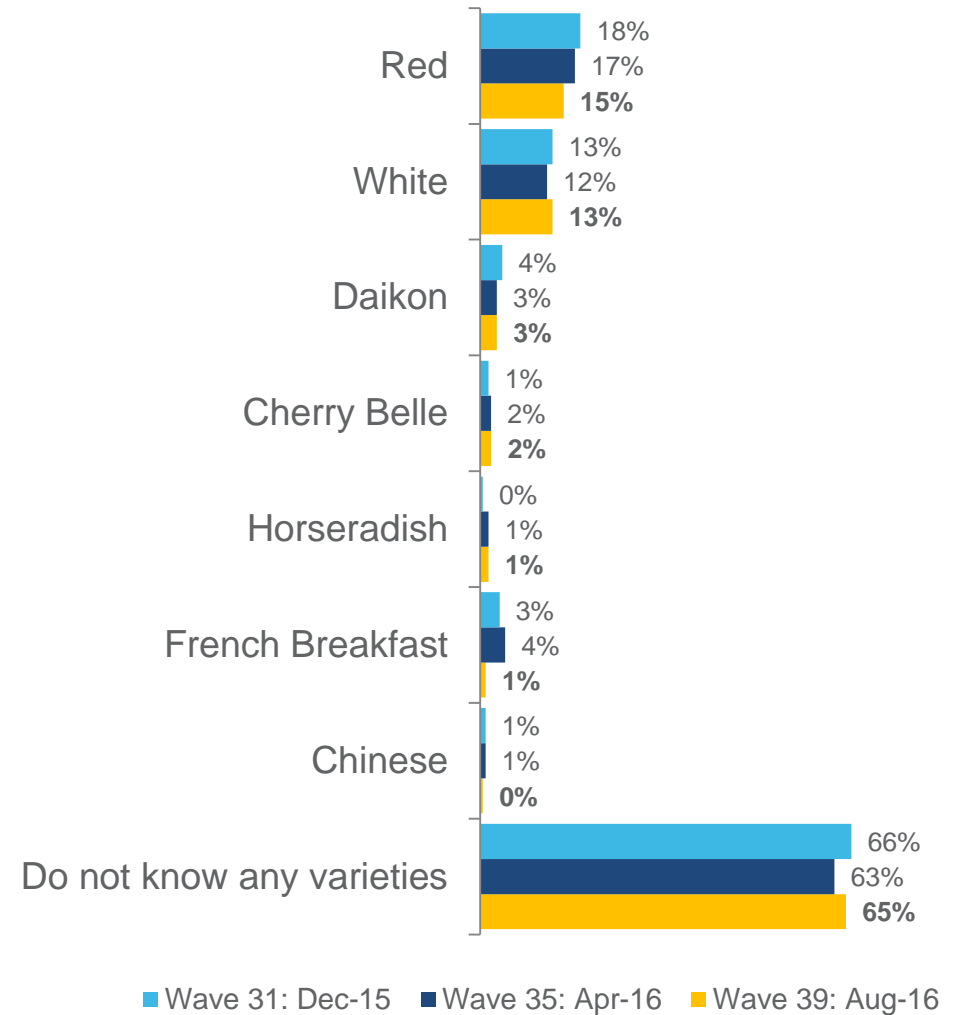
Pricing was carried out on 17th August between 10am-12pm.
 Prices are displayed Online / In-store.

Green text indicates promotional price.



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

Consumers are generally prompted by colour for radish varieties.

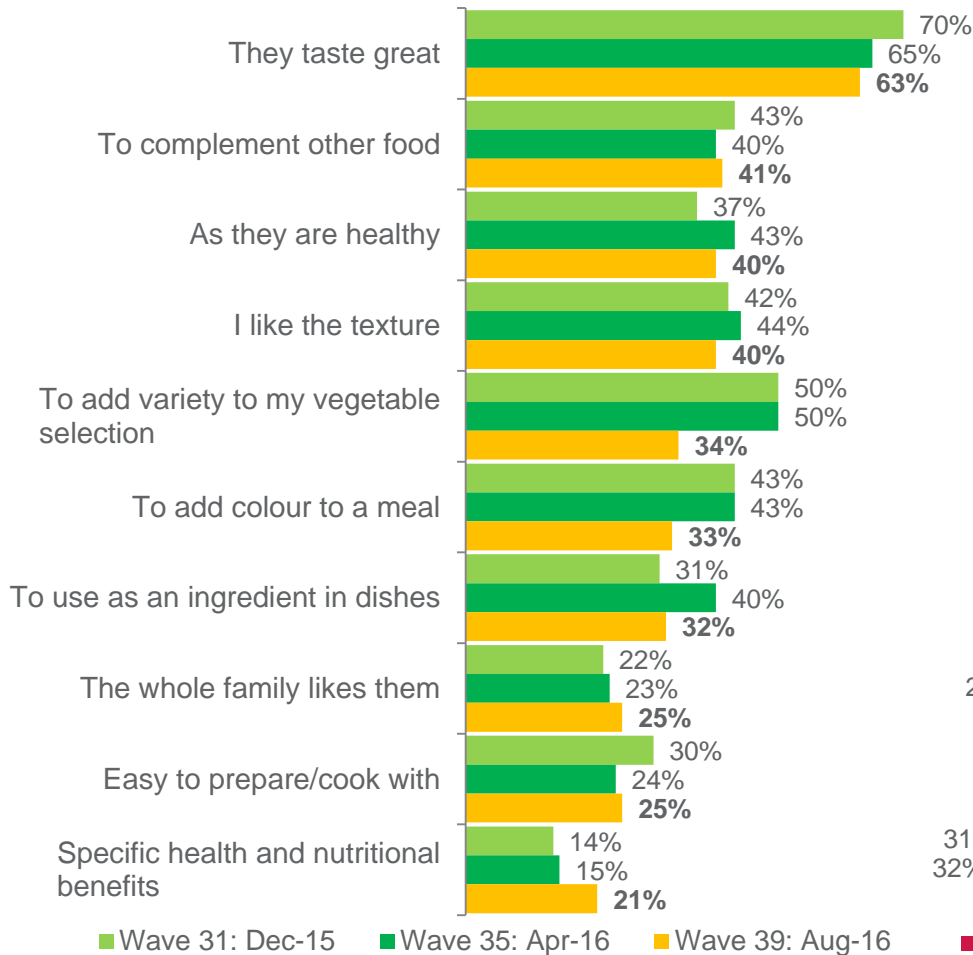


Q6a. What varieties of Radish are you aware of? (unprompted)
Sample Wave 31 N=202, Wave 35 N=202, Wave 39 N=202

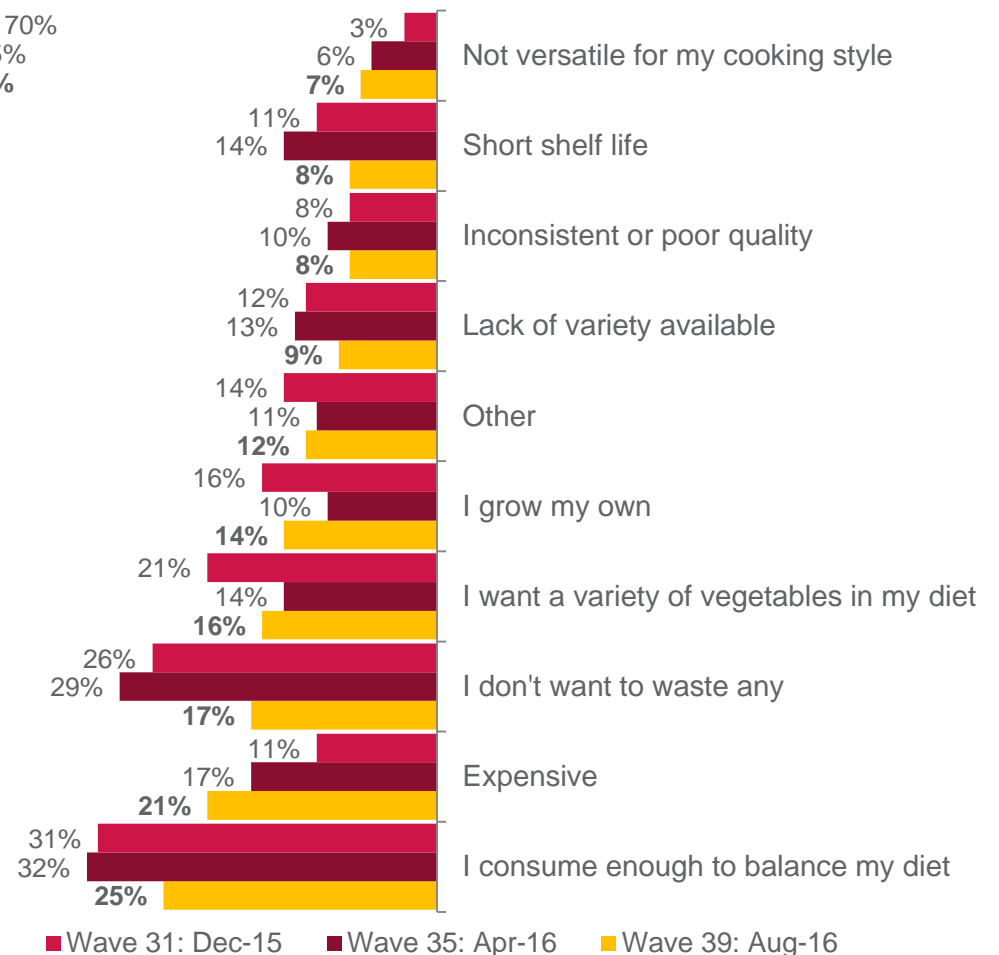


Taste, complementing other food and health are the key drivers of purchase. Barriers to purchase are already consuming enough, price and not wanting to waste any.

Triggers



Barriers



Q7. Which of the following reasons best describes why you purchase Radish?
Q8. Which reason best describes why you don't buy Radish more often?
Sample Wave 31 N=202, Wave 35 N=202, Wave 39 N=202



Australian cuisines and snacks are most popular for radish dishes.

Meal occasions tend to occur during lunch and dinner. An increasing amount of consumers are using radish when cooking a new recipe.

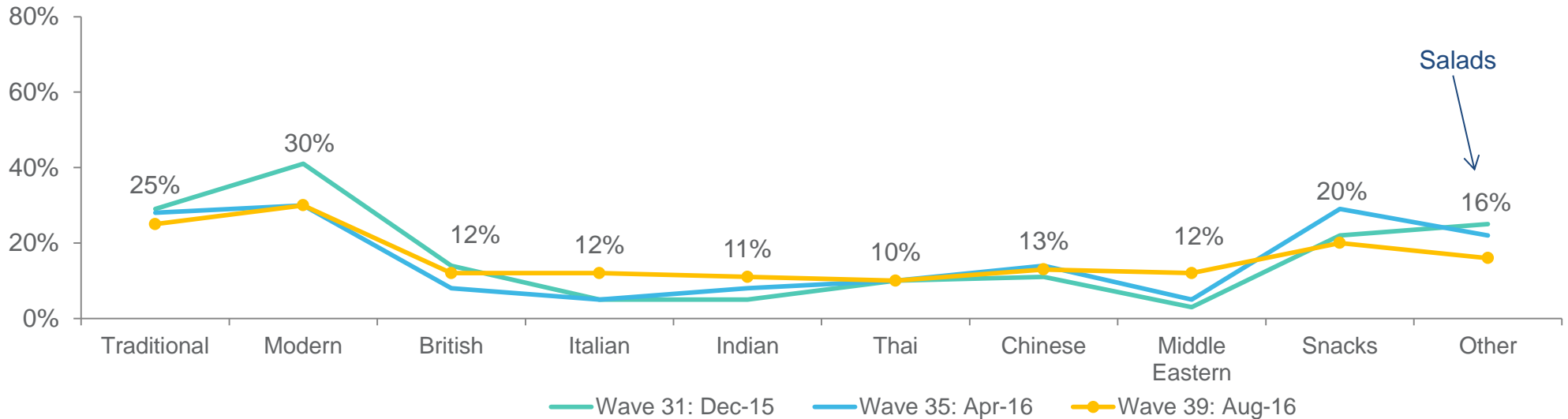
Top 5 Consumption Occasions

	Wave 35	Wave 39
Lunch	47%	43%
Dinner	48%	41%
Quick Meals	37%	35%
Family meals	35%	34%
Weekday meals	30%	30%

16%
used radish when cooking a new recipe

▼ 15%, Wave 35

Typical Cuisine Cooked



Salads

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

Q10. What cuisines do you cook/consume that use Radish?
 Q11. Which of the following occasions do you typically consume/use Radish?
 Sample Wave 31 N=202, Wave 35 N=202, Wave 39 N=202

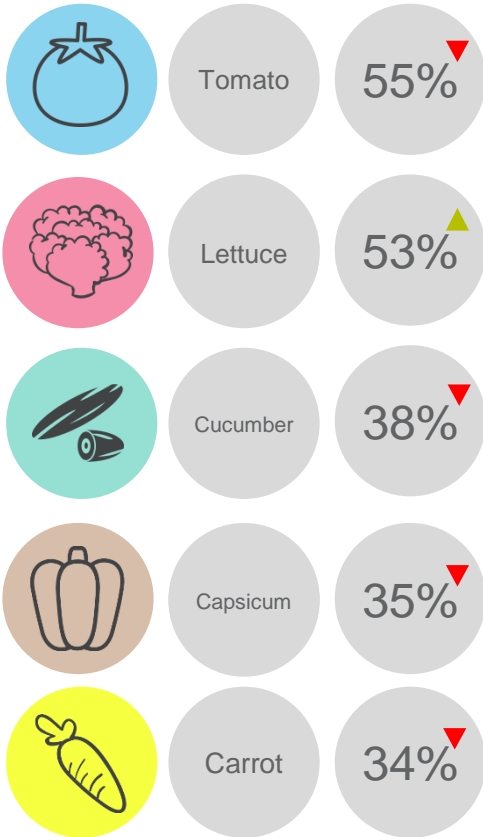


▼: Indicates LOWER score than current wave.
 ▲: Indicates HIGHER score than current wave.



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

Accompanying Vegetables



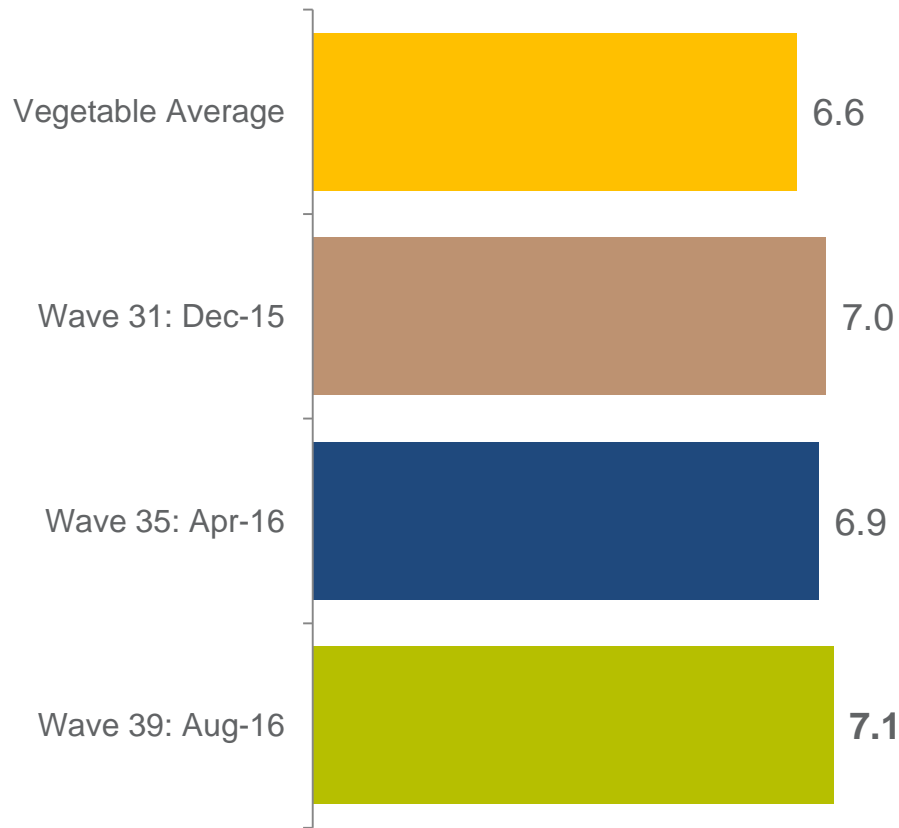
Top Cooking Styles

	Wave 31	Wave 35	Wave 39
Raw	80%	81%	78%
Stir frying	13%	20%	19%
Soup	8%	11%	12%
Steaming	4%	3%	10%
Boiling	2%	3%	8%
Slow Cooking	2%	6%	8%
Sautéing	6%	6%	8%
Roasting	4%	6%	7%
Frying	2%	5%	5%
Grilling	1%	3%	5%

Q9. How do you typically cook Radish?
Q10a. And when are you serving Radish which of the following do you also serve together with this?
Sample Wave 31 N=202, Wave 35 N=202, Wave 39 N=202



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



Q14. When purchasing Radish, how important is Provenance to you?
 Q15. And when purchasing Radish, how important is that it is grown in Australia?
 Sample Wave 31 N=202, Wave 35 N=202, Wave 39 N=202

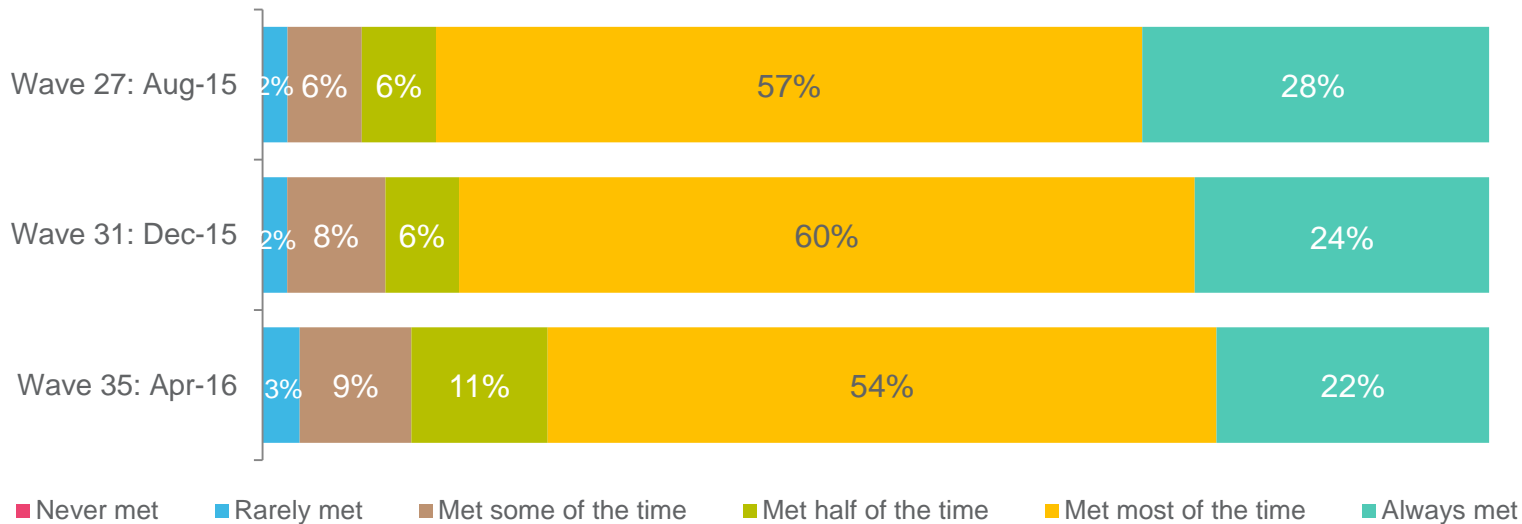


Consumers expect radishes to remain fresh for almost nine days once purchased. Expectations of freshness has continually declined, and are being met less often.

Expected to stay fresh for 8.7 days

- ▼ 8.4 days, Wave 31
- ▲ 8.8 days, Wave 35

Expectations Met



Q12. How long do you expect Radish to stay fresh for, once you have purchased it?
 Q13. How often is this length of freshness met when you buy Radish?
 Sample Wave 31 N=202, Wave 35 N=202, Wave 39 N=202

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

Radish Product Launch Trends.

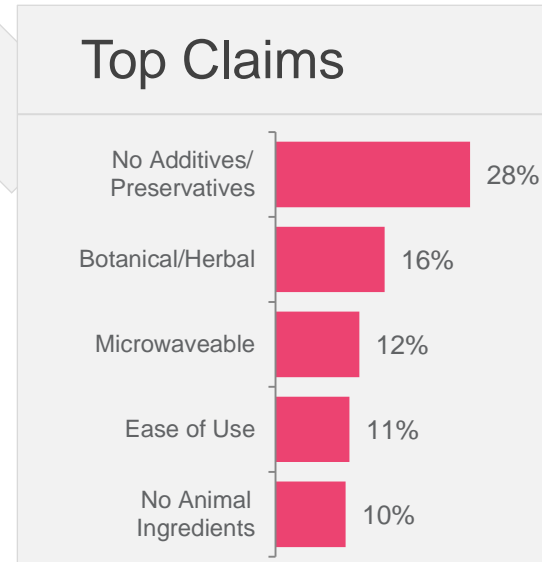
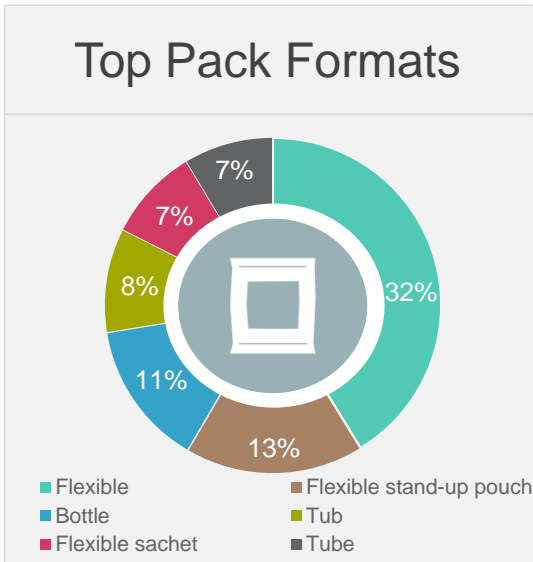
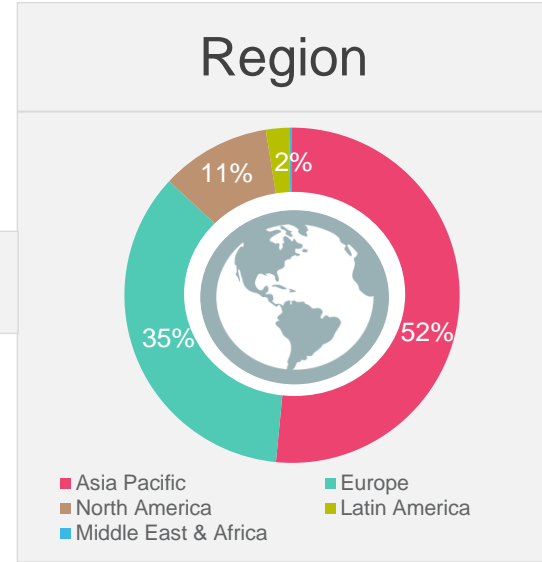
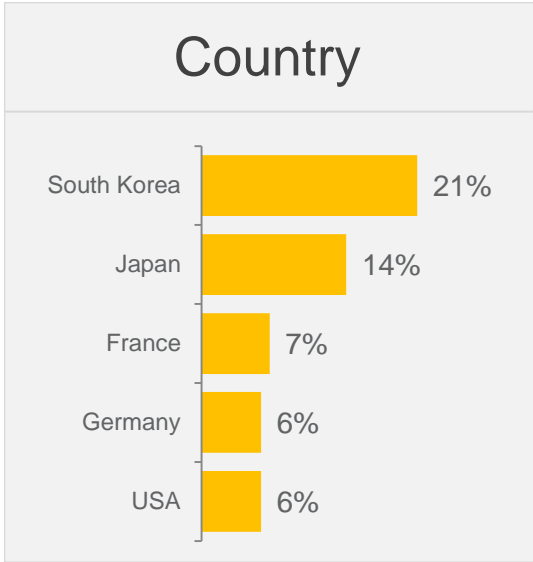
Radish Global Launches

May – August 2016

There were 359 radish products launched globally over the last three months. The majority of launches were in South Korea and Japan. Categories for launches were sugar & gum confectionery, and meals. Key packaging for radish products were flexible formats.



359 Global NPDs





Radish Product Launches: Last 3 Months (May – August 2016) Summary

- There were 359 launches in the past 3 months globally that contained radish as an ingredient.
- There was two products launched in Australia over the past three months.
- Asia Pacific (52%) and Europe (35%) were the key regions for launches.
- Flexible packaging (32%), flexible stand-up pouches (13%) and bottles (11%) were the most common format used for products.
- The main categories for launches were sugar and gum confectionery (17%), meals (16%) and sauces & seasonings (9%).
- Claims used on products were no additives/preservatives (28%), botanical/herbal (16%), and microwaveable (12%).
- The most innovative product launched was a Whole Sweet Radish from Thailand. Examples of other innovative launches can be found in the following pages.



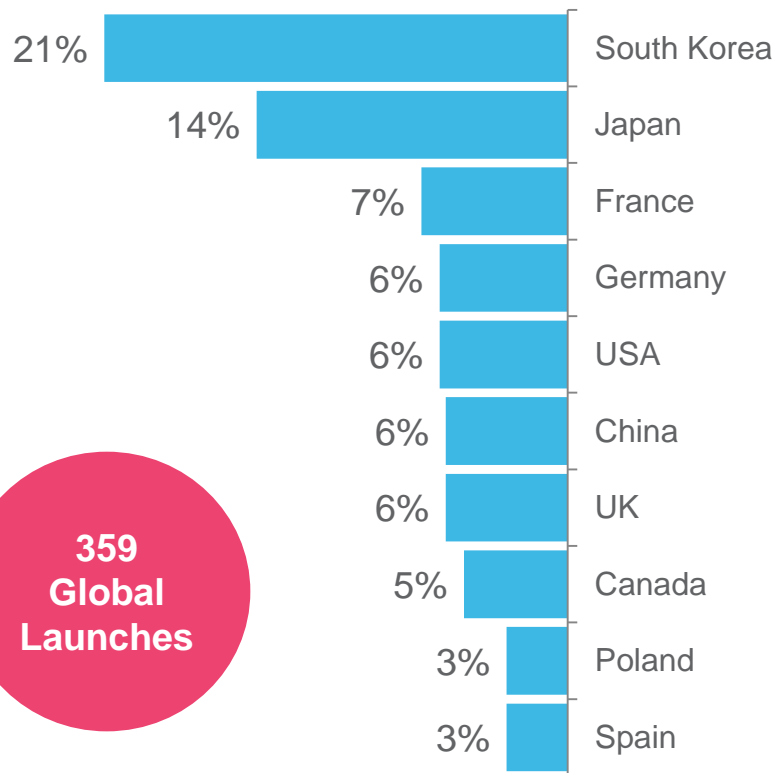
Source: Mintel (2016)



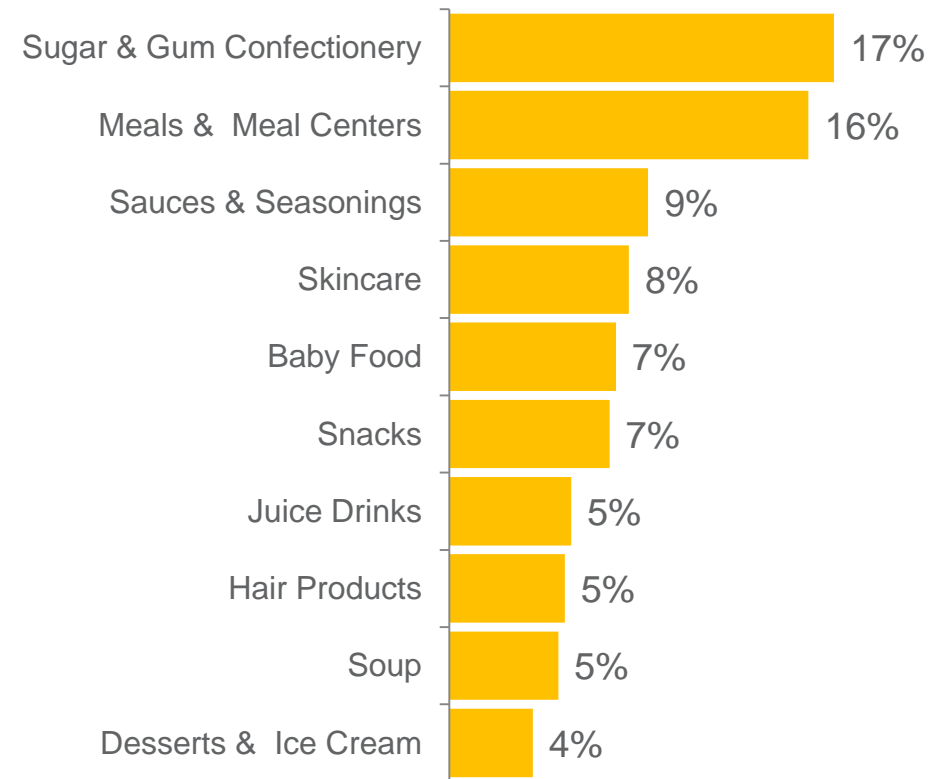
The majority of launches occurred in South Korea, Japan and France.

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

Top Launch Countries



Top Launch Categories












359
Global
Launches














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

Pack Formats Used

Global		Flexible	32%
		Flexible stand-up pouch	13%
		Bottle	11%
Asia Pacific		Flexible	22%
		Flexible stand-up pouch	22%
		Flexible sachet	12%
Europe		Flexible	44%
		Bottle	13%
		Carton	7%

Top Claims Used

Global		No Additives/Preservatives	28%
		Botanical/Herbal	16%
		Microwaveable	12%
Asia Pacific		No Additives/Preservatives	26%
		Microwaveable	23%
		Ease of Use	15%
Europe		No Additives/Preservatives	31%
		Botanical/Herbal	18%
		Ethical - Environmentally Friendly Product	16%

Only regions with n >30 are displayed

➤➤➤ Innovative Radish Launches: L3M (May – August 2016)

Tuzot Natural Vegetable Seasoning with Himalayan Salt (Turkey)

Tuzot Natural Cesni (Natural Vegetable Seasoning with Himalayan Salt) is now available. The product can be used to season meat, grain and vegetable dishes, rice pilaf, pasta, rolled grape leaves, savoury pastries and sauces. It can also be used to marinate meat, chicken, meatballs and other grilled dishes, and is free from added MSG, preservatives and colours. This seasoning retails in an 170g pack featuring a recipe suggestion.



Claims:
No Additives/Preservatives

Suhyup Junganghoe Deli Bada Mackerel Potato Stew (South Korea)

Suhyup Junganghoe Deli Bada Mackerel Potato Stew is convenient food that is harmonized with mackerel caught from the southern sea and radish, that absorbs the charcoaled flavour and sauce. This product can be heated in a microwave, and it retails in a 400g pack.



Claims:
Microwaveable, Ease of Use

Les 3 Chouettes Pickles de la Ferme Radish & Mint Pickles (France)

Les 3 Chouettes Pickles de la Ferme Radis - Menthe Pickles de la Ferme (Radish & Mint Pickles) are now available. The product is said to be crispy and bitter-sweet, ideal as an appetizer. It retails in a 210g pack featuring the AB, EU Green Leaf, Facebook and Twitter logos.



Claims:
Organic, Social Media

Peacock Jipbap Yeonguso Cold Acorn Jelly Soup (South Korea)

Peacock Jipbap Yeonguso Cold Acorn Jelly Soup can be simply enjoyed with cool soup. The product contains 35.99% acorn jelly, and retails in a 972g pack, which is sufficient for two servings.



Claims:
Ease of Use

»»» Innovative Radish Launches: L3M (May – August 2016)

Delhaize Vegetables with Radish (Belgium)

Delhaize Crudités avec Radis (Vegetables with Radish) comprise a mix of vegetables. The product retails in a 150g pack.



Claims:
N/A

Ebara Grated Radish Sauce (Japan)

Ebara Grated Radish Sauce has been repackaged. This product is free from artificial seasonings and comprises brown rice black vinegar, lemon juice and grated daikon radish. It is said to be suitable for grilled meat, hamburgers, salad and fried foods, and retails in a 100g pack. Launched on April 11, 2016 with an RRP of 198 yen.



Claims:
No Additives/Preservatives

Havita Ready To Eat Summer Edition Barbecue Mix Salad (France)

Havita Ready To Eat Frischer Salat Barbecue Mix Sommer Edition (Summer Edition Barbecue Mix Salad) comprises mixed salad leaves, sweet corn, cherry tomatoes, bell pepper and radish. This ready-to-eat product, which can be easily prepared by adding a favourite dressing, retails in a 500g pack.



Claims:
Seasonal, Ease of Use, Limited Edition

Smart Vegetable All In One Vegetable Seasoning Powder (Taiwan)

Smart Vegetable All In One Vegetable Seasoning Powder is made with Taiwan carrot, cabbage, pumpkin, shiitake, broccoli and radish extracts. It is said to provide a refreshing sweet taste to dishes. It is free from preservatives, flavour and sweeteners and retails in a 140g pack featuring an easy open cap.



Claims:
No Additives/Preservatives, Convenient Packaging

➤➤➤ Innovative Radish Launches: L3M (May – August 2016)

Titbit Salát s Chutí Light Garden Salad with Dip and Baked Beetroot (Czech Republic)

Titbit Salát s Chutí Lehký Zahradní Salát se Zálivkou a s Pecenou Repou (Light Garden Salad with Dip and Baked Beetroot) with dressing is said to have fresh taste. This vegetarian product retails in a 200g pack.



Claims:
Vegetarian, Slimming

CJ CheilJedang Bibigo Radish Kimchi (South Korea)

CJ CheilJedang Bibigo Radish Kimchi is claimed to be properly made with premium Korean ingredients to offer an authentic Korean kimchi. This product is salted with well dried sea salt from Shinan, seasoned with sauce, includes well ripened Korean pear and premium fish sauce from the southern coast of Korea, and is coloured with finely ground red chilli powder from Kyungpook. It retails in a 500g pack bearing the HACCP logo.



Claims:
Premium

Tops Whole Sweet Radish (Thailand)

Tops Whole Sweet Radish is produced from radish through a clean standard production process that is hygienic. The product is suitable for vegetarians and retails in a 200g pack with a recipe suggestion on the back.



Claims:
Vegetarian

Clearspring Japanese Organic Dried Daikon (Portugal)

Clearspring Daikon Seco Bio (Japanese Organic Dried Daikon) is a dried Japanese white radish. It is said to be made the traditional way, by simply shredding the fresh daikon and drying it. This giant white root is one of quintessential vegetables in the Japanese diet. Its versatility is endless and it is as good cooked, dried or pickled as it is raw. The vegan product is a source of fibre and retails in a 40g resealable pack featuring the Soil Association Organic, EU Green Leaf and Debio logos.



Claims:
Organic, Vegan, Convenient Packaging, No Animal Ingredients



In the Media.





General Vegetable News

(May – August 2016)

- A Queensland grazier hopes a new national website will help farmers connect directly with consumers, food manufacturers and restaurants to directly market produce.
- Creator Sarah Waldock launched The Local Farm Produce site in Bundaberg in July, and will be rolled out to other states in coming months. Sarah stated that she wanted a better way for foodies of all levels to connect locally.
- The website caters for three tiers of producers: primary producers like growers, graziers and fishermen; secondary producers who value-add to fresh food; or tertiary producers like restaurants and cafes whose menus include local primary or secondary products. It also promotes food tourism such as festivals, markets and farm experiences, and shows the relationships between all of the producers, outlets and events.
- She hoped her website would fill the gap for those who wanted to explore making connections, but did not have expertise in areas such as branding, marketing and social media. So far 34 Queensland producers have signed up for listings on the site, but Ms. Waldock said it was consumers really driving the demand.
- Producers were looking for ways to easily market themselves online, which could lead to greater profitability. Furthermore, producers may even consider value-adding their produce — “farmers are told all the time they need to be looking at value-adding and marketing themselves, so this is a way for them to do that.”



Source: <http://www.abc.net.au/>



Commodity News

(May – August 2016)



- Red Chinese cabbage debuted on the Polish market for the first time ever this year, and producer Vega Fresh is the exclusive importer of the seeds for the Polish market. Two varieties will be cultivated.
- "Red Chinese cabbage has a slightly different flavour than the green varieties. It is crispier, slightly resembling iceberg lettuce. Another advantage is that it is sweet, does not lose volume and doesn't stain when mixed with other greens. The cabbage is very unique and we think that it has great potential." said Radosław Piotrowski, CEO of Vega Fresh.

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



- The first ever experiment to test whether a calorie-negative food exists revealed eating celery is a powerful weight loss aid – burning up to double the calories it contains.
- A man was fed raw celery and a celery smoothie, both worth 53 calories. He burned 72 calories eating celery and 112 calories drinking the smoothie.
- Dr Tom Barber, of Warwick, said: 'If you liquidise that celery, that breaks down all that fibre and you release the nutrients which gives the liver more work to do.'

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



- A potentially devastating plant virus able to infect a number of horticultural crops has been detected for the first time in Western Australia.
- The Cucumber Green Mottle Mosaic Virus has been found in a continental cucumber crop near Geraldton, about 400 kilometres north of Perth.
- Geraldton is a significant production region for Australia's continental cucumber crop.

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



There was no Zucchini specific news to report this wave.



Commodity News

(May – August 2016)



- Advocates of the Bt (*Bacillus thuringiensis*) eggplant are studying the commercial production of Philippines' first genetically enhanced vegetable. This is after the Supreme Court had revised its 2015 decision to stop field tests of genetically modified (GM) crops. The target is to have commercial production within a year's time
- The development of Bt talong is intended to address issues involving the fruit and shoot borer (FSB), which destroys eggplant at rates of up to 73% of the crop, forcing farmers to make extensive use of expensive and harmful pesticides. Bt talong is expected to significantly improve the income of the farmers as it is high-yielding and reduces production costs.

<http://www.freshplaza.com>



- Unfavourable weather, a heavy market and slow demand have reduced spring onion exports from Italy by approximately 80%.
- Germany is one of the main export destinations, but production has overlapped with the local produce, adversely impacting on sales.

<http://www.freshplaza.com>



- Two British entrepreneurs are growing crops in a former World War II air-raid shelter in London.
- Richard Ballard and Steven Dring started Growing Underground in 2015 and claim it's "the world's first subterranean, urban farm." Their crops include radish, pea shoots, garlic, chives, red basil, mustard leaf, coriander and a dozen more, sold to online distributors, at farmers markets and mostly to a wholesale market that distributes to thousands of restaurants around London.
- The founders use LED lights to grow the crops and "are dedicated to minimizing our carbon footprint."

<http://www.whas11.com/>



Background & Methodology.



➤ Background & Setting the Scene.

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

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

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

This wave's report (Wave 39, August 2016) focuses on:

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

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





Online Methodology.

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

General Respondent Questions

Demographics

Vegetable Consumption

1/7 Commodities

Commodity Specific Questions

Category Health

Purchase & Consumption Habits

Price Perceptions & Average Spend

Triggers/Barriers to Purchase

Preparation Preferences

+ 2 Ad hoc Questions per Month





Sample.

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

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

To qualify for the questionnaire, respondents...

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

	Cabbage n=308	Celery n=304	Cucumber n=303	Zucchini n=309	Eggplant n=200	Spring Onion n=202	Radish n=202
Gender							
Male	43%	40%	42%	37%	35%	31%	41%
Female	57%	60%	58%	63%	65%	69%	59%
Age							
18-24 y.o.	3%	3%	3%	2%	5%	2%	2%
25-34 y.o.	14%	15%	16%	14%	19%	6%	15%
35-44 y.o.	20%	18%	18%	21%	21%	18%	20%
45-54 y.o.	21%	17%	19%	25%	10%	23%	22%
55-64 y.o.	23%	23%	22%	18%	30%	31%	22%
65+ y.o.	19%	24%	22%	20%	16%	19%	19%
Household							
Single Income no Kids	19%	17%	15%	17%	19%	16%	13%
Double Income no Kids	14%	16%	13%	13%	23%	20%	15%
Young Families	16%	15%	19%	21%	15%	12%	16%
Established Families	27%	24%	27%	24%	22%	26%	26%
Empty Nesters	25%	28%	26%	26%	23%	27%	30%
Location							
New South Wales	19%	17%	16%	18%	19%	14%	28%
Victoria	17%	18%	22%	20%	22%	16%	17%
South Australia	20%	18%	17%	15%	18%	16%	15%
Queensland	18%	17%	19%	20%	14%	19%	21%
Western Australia	17%	19%	17%	15%	18%	19%	11%
Tasmania	7%	6%	5%	7%	5%	11%	6%
Australian Capital Territory	2%	5%	4%	5%	3%	2%	1%
Northern Territory	1%	1%	1%	1%	2%	1%	0%





Trends Research: Our Approach



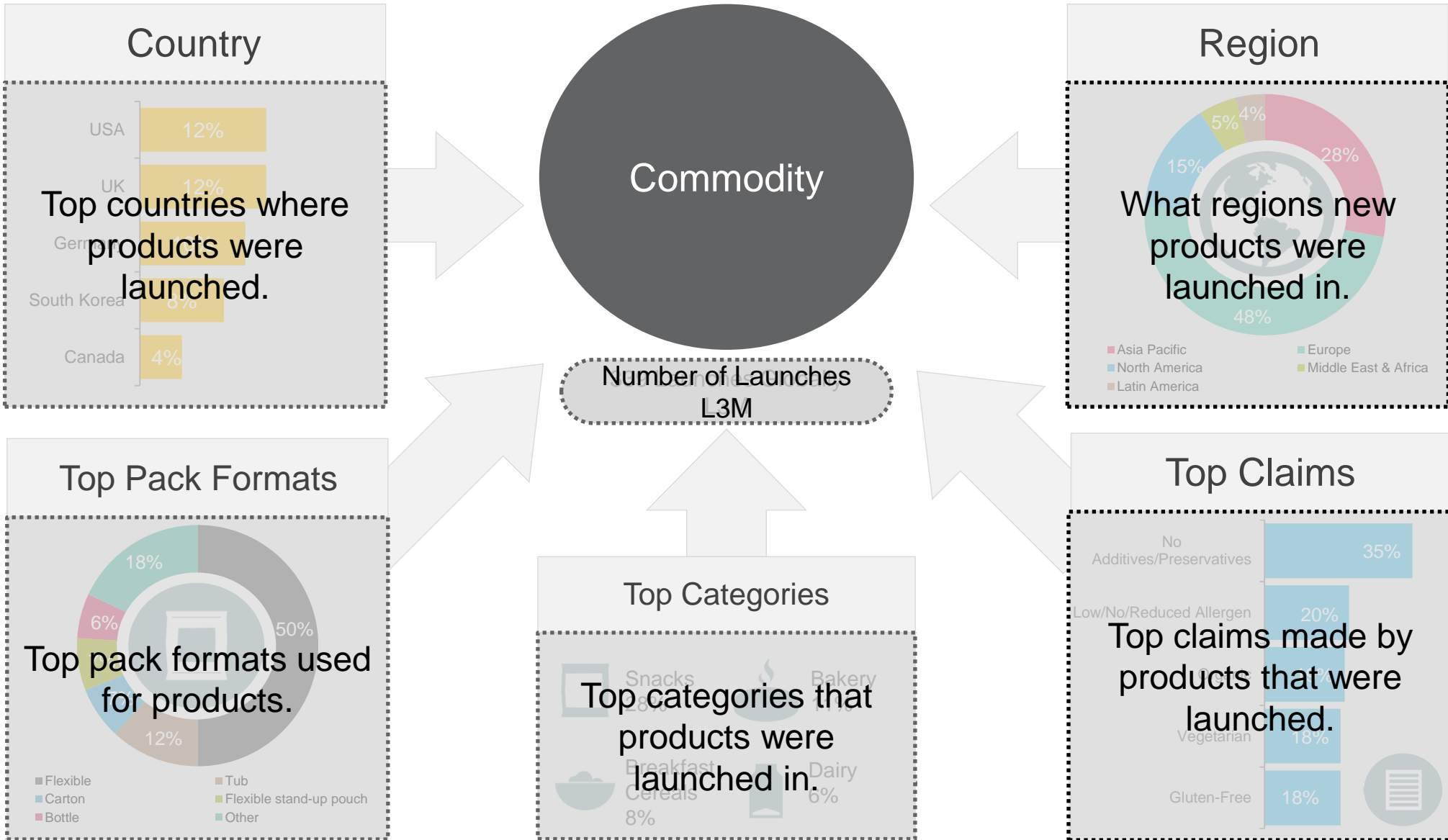
- ▶ Colmar Brunton has used a combination of both desk research and in the field of market research to explore the trends of each vegetable commodity being tracked this month.
- ▶ Our main source of secondary data for this report was collected from Mintel Global New Products Database (GNPD).
- ▶ This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



Product Launches Last 3 Months (L3M)

How to Read Summaries

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





Thanks.

