Project Harvest Monthly Tracker Report.

Wave 40, September 2016
Vegetables tracked: Asian Vegetables, Capsicum, Brussels Sprouts, Spinach, Parsnips, Beetroot, Sweetpotatoes

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

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Contents.

Wave 40:
Executive Summary

Industry Insight.

The effect of diet on childhood health has been topical in recent months. Unfortunately, children are not the only population at risk, with adult obesity rapidly rising globally between the years of 2000 to 2016 at a much faster rate than it did between 1975 to 2000 (Scientific American, August 2016). In Australia, over 60% of the adult population are considered overweight and obese, which has also increased over the past 20 years (ABS).

At the other end of the spectrum the anti-obesity messaging has been observed to have a negative effect on people with eating disorders, which is also on the rise. The Butterfly Foundation said that children as young as six were being affected.

Instead of shaming any one group, we need to focus on a message that positively speaks to everyone - *healthy eating*. Such positive messaging has had an impact in the beauty industry (the Dove "real Beauty" campaign), the sporting industry (Nike "Just Do It") and the retail industry (Woolworths "Farmers Promotion"). Similarly, the entire vegetable industry as well as Australians overall would benefit from committing to, contributing to and leading this positive message - promoting Australian-grown, nutrient-dense and good-for-the-whole-family vegetables!

Asian Vegetables Grower Action Plan.

Wave 40 Fast Facts – Asian Vegetables

- Asian vegetables have positive consumer sentiment and propensity to purchase, consistent with previous waves.
- Asian vegetables are purchased 5 times per month and are consumed around 9 times per month, relatively consistent with the previous wave.
- Consumers purchase 1.0kg of Asian vegetables per shop. Recalled last spend is $5.00. Overall, consumers perceive Asian vegetables to be good value for money.
- National price tracking indicated the average price for Buk Choy in September 2016 was $2.48 each, which is relatively consistent between states and retailers.
- Just over one quarter of consumers are unable to recall a type of Asian vegetable. Buk Choy remained the most recalled type of Asian vegetable, followed by Choy Sum and Wombok.
- Asian vegetables are expected to stay fresh for nearly a week, and freshness expectations are met most of the time. Asian vegetables appear to be largely unaffected by seasonal changes.
- Ease of preparation and health are the main influences on purchase of Asian vegetables. Not wanting to waste any and already consuming enough are the primary barriers to purchase.

24% of consumers used Asian vegetables when cooking a new recipe.

1. Insight:

Wastage remains the primary reason for preventing future purchase of Asian vegetables.

Short Term Recommendation:

Investigate opportunities to provide mini formats suitable for one or two meal occasions. Provide ‘stem to root’ recipe ideas at point of sale to reduce wastage, as well as including Asian vegetables in cuisines outside of Asia. These actions will help increase the perceived versatility of Asian vegetables.

2. Insight:

Approximately one in four consumers use Asian vegetables when cooking a new recipe.

Long Term Recommendation:

Consumers are willing to experiment with Asian vegetables when cooking new dishes. Provide cooking ideas and flavour profiles at point of sale to encourage consumers to trial lesser known varieties such as Asian melons, white radish and lotus root.

Wave 40 Fast Facts – Capsicum

- Consistent with previous waves, capsicums have strong category health figures for importance, satisfaction, endorsement and interest in new varieties.
- Purchase frequency of capsicum increased this wave. Capsicum is consumed on average 10 times per month and is purchased mainly from mainstream and specialist retailers.
- Consumers are purchasing 600g of capsicums on average. Recalled last spend is $3.80, which is perceived to be good value for money.
- Price tracking for September 2016 showed the national average as $5.72 per kg for green capsicums.
- Over one half of consumers were unable to recall a type of capsicum. Colour was the main trigger to recall.
- Adding colour and to use as an ingredient were the key influences to purchase. Barriers to purchase included not wanting to waste any and expense.
- Consumers expect capsicums to remain fresh for 9 days once purchased. These expectations are generally being met at least most of the time.

32 launches

The number of product launches in Australia containing capsicum over the last three months.

1.

Insight:

There has been an increasing trend in using capsicum for complementing other food across waves.

Short Term Recommendation:

Provide consumers with flavour profiles and recommended dishes that capsicum can be added to. This will assist in making the inclusion of capsicum into more dishes simple and easy.

2.

Insight:

Purchase from non-mainstream retailers is variable across waves.

Long Term Recommendation:

Ensure adequate distribution of capsicums to widespread purchase channels for consistent availability. This will help to assist in the growth of the category.

Brussels Sprouts Grower Action Plan.

Wave 40 Fast Facts – Brussels Sprouts

- Brussels sprouts had relatively strong category health figures, with consumers having relatively strong future purchase intent.
- Brussels sprouts were purchased around three times per month and were consumed seven times per month. Purchase is predominantly through mainstream and specialist retailers.
- Overall, Brussels sprouts were perceived to be good value for money. Consumers on average purchase 600g of Brussels sprouts, typically in the format of individual sprouts. Recalled last spend was $4.10.
- Price tracking for September 2016 revealed the average price was $10.22 per kg, substantially higher than $7.63 per kg recorded in May 2016.
- Over three quarters of consumers could not recall any types of Brussels sprouts. Low awareness was consistent with previous waves.
- Brussels sprouts were expected to stay fresh for nearly 9 days, which was increasingly being met all of the time.
- Top triggers for purchase were health and ease of preparation. Key barriers to purchase were already consuming enough and wanting a variety in their diet.

35% of consumers purchased Brussels sprouts in pre-packaged small trays.

1.

Insight:

One in ten consumers are limiting their purchase of Brussels sprouts due to perceptions of poor quality.

Short Term Recommendation:

Investigate the cause and/or source of poor or inconsistent quality. Evaluation of the entire cold chain should be investigated for packaging, transportation, storage and displays at point of sale to improve quality. Additionally, provide consumers with storage instructions to ensure longevity in home.

2.

Insight:

Consumers are increasingly purchasing Brussels sprouts for their texture, to complement other food and because they cook quickly.

Long Term Recommendation:

Provide cooking styles and accompanied textures to entice greater purchase i.e. steam for softness, roast with bacon for a crunchy outside and soft middle, shave raw into salads for added crunch.

Spinach Grower Action Plan.

Wave 40 Fast Facts – Spinach

- Spinach has strong category health figures for importance, satisfaction, endorsement and interest in new varieties.
- Purchase of spinach occurred around 5 times per month and was consumed on average 10 times per month.
- Overall, spinach was perceived to be good value for money, with recalled last spend at $3.90.
- Consumers on average purchase 0.5kg of spinach, typically in a loose format, with pre-packaged formats also popular options.
- Price tracking for September 2016 revealed that the average price of Baby Spinach was $17.45 per kg, slightly higher than prices recorded in May 2016.
- Nearly half of consumers could not recall a type of spinach. English and Baby were the most recalled types.
- Spinach is expected to stay fresh for 6 days, which is being met at least most of the time.
- Top triggers for purchase are based around health, ease of preparation, and taste. In contrast, the key barriers included short shelf life and not wanting to waste any.

$3.90 was the average recalled last spend on spinach in Wave 40.

1.

Insight:

Spinach is predominantly cooked in Australian cuisines.

Short Term Recommendation:

Encourage consumers to cook spinach outside of their current repertoire. This may include cuisines such as Greek (spanakopita) or Indian (palak paneer).

2.

Insight:

Expense remains a key barrier to purchase.

Long Term Recommendation:

Encourage purchase of spinach with the availability of loose leaf options. This decreases the risk for consumers, as the cost outlay is smaller. Provide recipe ideas at point of sale to encourage greater use of spinach, highlighting its versatility to incorporate it in multiple dishes, and assisting to increase its perceived value.

Parsnip Grower Action Plan.

Wave 40 Fast Facts – Parsnip

- Parsnips hold lower levels of importance, satisfaction and endorsement than other vegetables, with future purchase intent relatively weaker than other commodities tracked.
- Parsnips are purchased on average two times per month and consumed on around five occasions per month. Purchase is primarily from mainstream retailers.
- On average consumers are purchasing 700g of parsnips per shop. Recalled last spend was $3.60, with value for money perceived as fair.
- Price tracking revealed an average price of $10.20 per kg of parsnips, which was lower than the previous wave ($10.94 per kg).
- There are low levels of awareness of parsnip types, with 88% of consumers unable to recall a type.
- The main motivations for purchasing include adding variety and taste. Price and already consuming enough are the key barriers to purchase.
- Parsnips are expected to stay fresh for over a week. Expectations of freshness are met at least most of the time.

$10.20 per kg

was the average price of parsnips in September 2016.

1.

Insight:

Overall, satisfaction is low for parsnips. Purchase frequency of parsnip has declined, as well as the average weight of purchase.

Short Term Recommendation:

Encourage trial and purchase of parsnips with consumer education around flavour profile, nutritional benefits and cooking styles to make the first purchase and usage simple and easy, encouraging consumers to routinely buy.

2.

Insight:

Price remains the most important factor preventing purchase of parsnips.

Long Term Recommendation:

Ensure availability of loose formats. Additionally, provide recipe ideas, ideally where parsnip is a replacement for a vegetable that consumers already use i.e. mash, chips, etc. This will increase value for money perceptions.

Beetroot Grower Action Plan.

Wave 40 Fast Facts – Beetroot

- Beetroot has strong levels of endorsement, indicating consumers are happy to recommend to family and friends. Future propensity to purchase is very high.
- Beetroot is purchased approximately 3 times per month. Consumption of beetroot occurs 8 times per month.
- On average, consumers purchase 0.8kg of beetroot. Recalled last spend was $3.70. Overall, consumers perceive good value for money (6.6/10).
- Price tracking revealed an average price of $4.82 per kg for beetroot, this was relatively consistent with prices recorded in May 2016 ($4.99 per kg).
- Awareness of beetroot types is very low, with 67% of consumers unable to recall a type.
- Beetroot is expected to remain fresh for 11 days. Freshness expectations are increasingly being met all of the time.
- Taste and health remain the key triggers to purchase. The main barriers to future purchase are consuming enough and wanting a variety of vegetables in their diet.

39% of consumers intent to increase their purchase of beetroot in the future.

1.

Insight:

Pre-packaged and pre-prepared formats are increasing in popularity for beetroot purchase.

Short Term Recommendation:

Look to global trends for inspiration for new product development (NPD) that contains beetroot as an ingredient. Current beetroot trends include soups, sauces/dips and salads.

2.

Insight:

There is a huge appetite for increasing purchase of beetroot in the future.

Long Term Recommendation:

As the beetroot category is growing, it presents the perfect time to differentiate the individual varieties of beetroot (i.e. chioggia, bull's blood, globe, yellow), ensuring that they each meet a need of consumers – such as adding colour, level of sweetness, texture etc.

Sweetpotatoes Grower Action Plan.

Wave 40 Fast Facts –Sweetpotatoes

- Sweetpotato has strong endorsement and interest, with high future purchase intent, consistent with the previous wave.
- Purchase of sweetpotato occurs 3 times per month and is consumed around 8 times per month, a slight decline from the last wave. Purchase is typically from mainstream retailers.
- Overall, sweetpotato is perceived to be good value for money (6.8/10). On average, consumers purchase 1.1kg of sweetpotato, typically loose. Recalled last spend is $3.50.
- Price tracking for September 2016 revealed an average price of $3.74 per kg, relatively consistent with prices in May 2016.
- Two thirds of consumers were unable to recall a variety of sweetpotato. Those who did more often recalled the colour rather than a specific variety, with Orange / Gold / Yellow being the most recalled colour.
- Taste, ease of preparation and health are the strongest triggers to purchase, while already consuming enough for their needs and not wanting to waste any the two biggest barriers.
- Consumers expect sweetpotato to remain fresh for two weeks, which is being increasingly met all of the time.

1.1kg is the average weight of purchase for sweetpotatoes.

1.

Insight:

Taste remains the key trigger to purchase for sweetpotatoes.

Short Term Recommendation:

To encourage consumers who are not primarily driven by taste (Wholesome Habits and Conscious Improvers), provide these consumers with alternative reasons to purchase sweetpotatoes – such as the health benefits, ease of use and versatility.

2.

Insight:

Sweetpotatoes are primarily used in Australian cuisine, with little variation outside of their current repertoire.

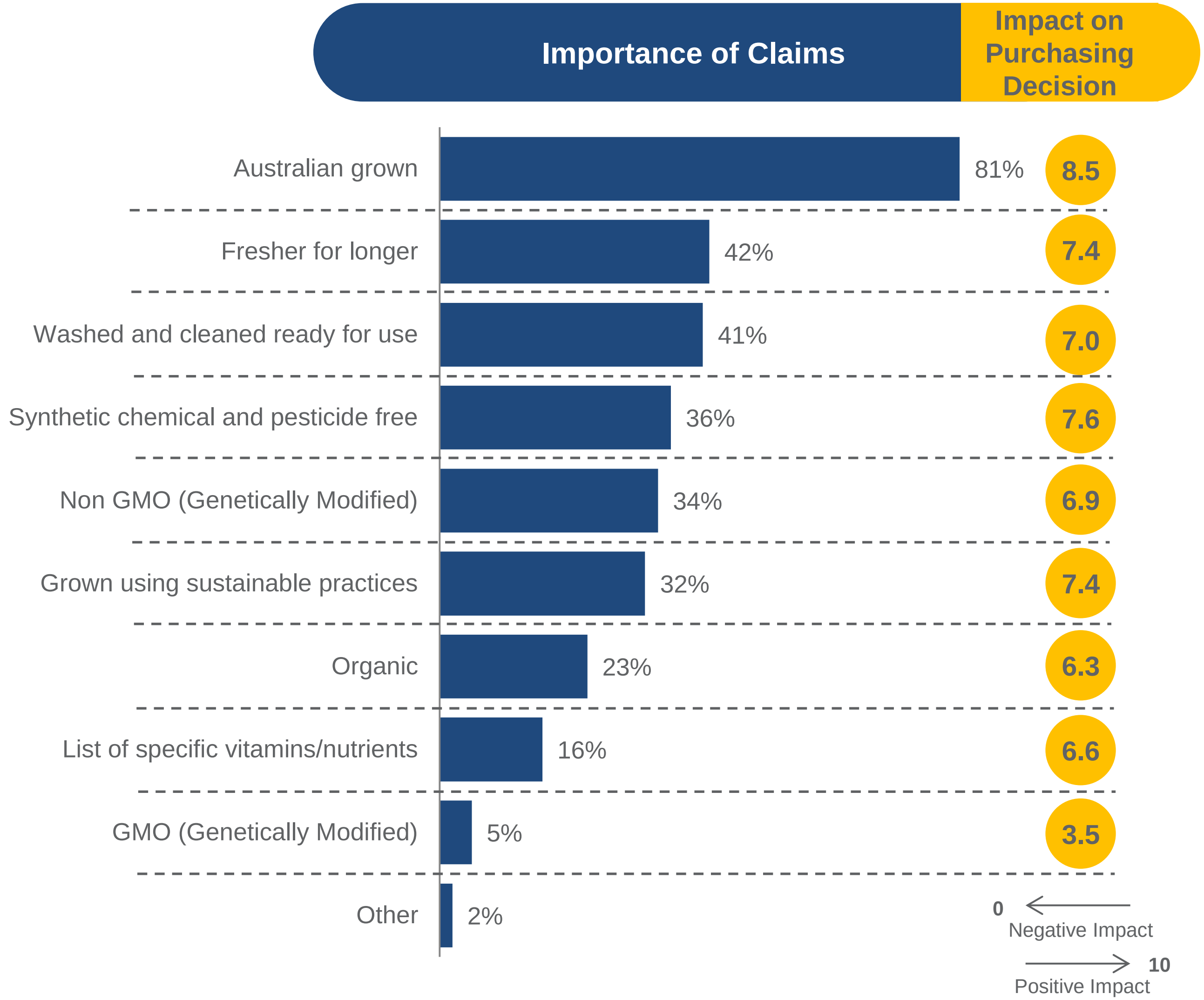
Long Term Recommendation:

Look to new product developments (NPD) products outside of Australian cuisine, such as Asian stews, Indian curries, and British mash. Additionally, products outside of dinner meal occasions have the potential to increase consumption frequency.

Wave 40:
Response to Ad hoc Questions

When purchasing fresh vegetables, ‘Australian grown’ is the most important claim to see on pack, whilst also having the greatest impact on the decision to purchase. ‘Fresher for longer’ and ‘washed and cleaned ready for use’ were also important claims for consumers, whilst ‘synthetic chemical and pesticide free’ had the second largest impact on purchasing decision.

Approximately one third of consumers perceived that ‘Non GMO’ was an important claim (34%), which had a positive impact on purchase.

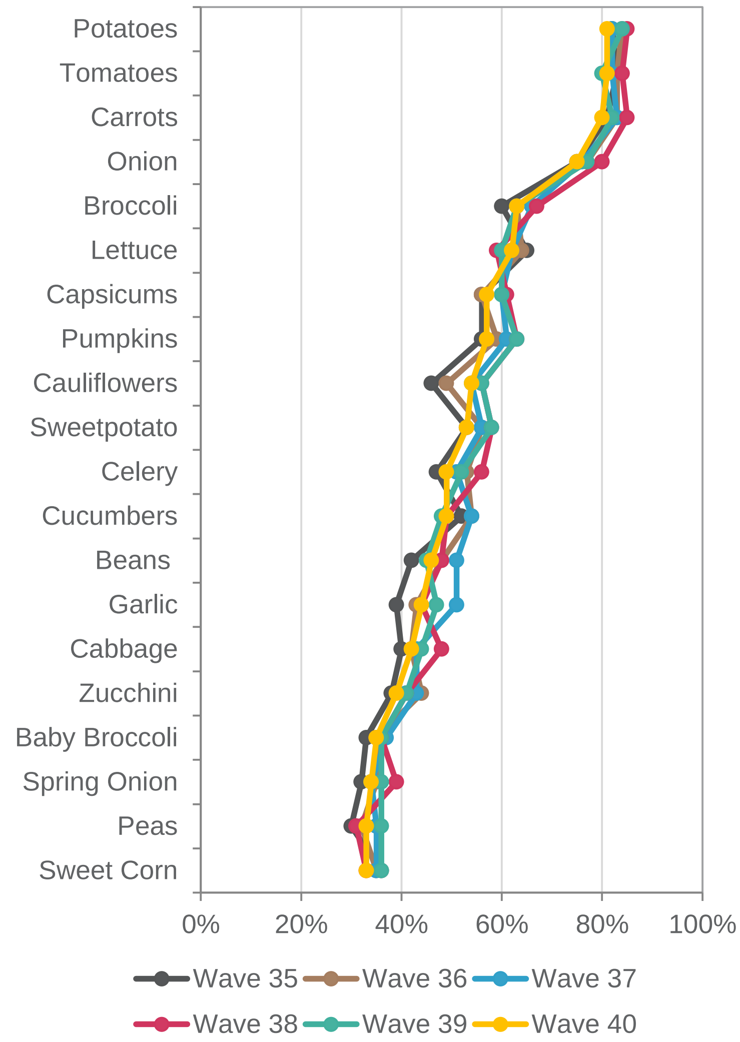


Wave 40: Overall Vegetable Tracking

Top 20 Vegetables Purchased Last Month

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

Vegetable purchase in September is relatively consistent with past months. This wave sees the biggest declines in purchase of pumpkin, parsnip and turnips- more heavily purchased in cooler months.



Sample Wave 40 N=1741 *(base in higher as Q appears in Screener)*
S8. Which of the following fresh vegetables have you purchased in the last month?

Category Health Explained.

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

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

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

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

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

	Asian Vegetables	Capsicum	Brussels Sprouts	Spinach	Parsnip	Beetroot	Sweet-potatoes	Vegetable Average
Importance	7.4	7.4	6.7	7.3	6.2	6.0	6.3	6.4
Satisfaction	6.8	7.6	7.1	7.1	6.6	6.5	7.1	6.7
Endorsement	7.7	7.5	7.1	7.7	6.6	7.7	7.9	7.0
Interest (New Varieties)	7.4	6.7	6.7	7.2	6.2	7.0	6.8	6.3
Future Purchase								
More	30%	13%	17%	24%	11%	39%	18%	16%
Same	69%	86%	81%	76%	87%	60%	82%	83%
Less	1%	1%	2%	1%	2%	1%	0%	1%

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

Asian Vegetables.

Purchase of Asian vegetables increased this wave, whilst consumption remained relatively stable. On average, consumers eat Asian vegetables twice a week.

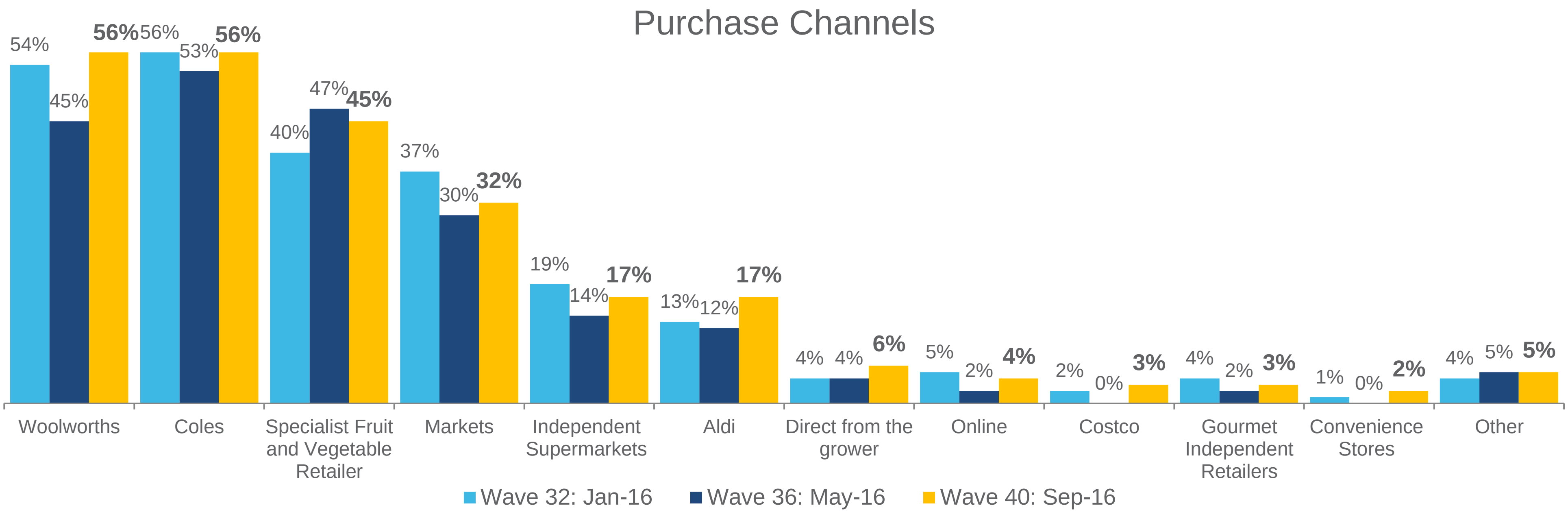
Woolworths and Coles are key locations for purchase. There has been a noticeable increase in purchase from Woolworths this wave, returning to levels seen in January.

Average Purchase **5.3** times per month

▼ 4.4 times, Wave 32
▼ 4.8 times, Wave 36

Average Consumption **8.5** times per month

▼ 7.6 times, Wave 32
▲ 8.6 times, Wave 36



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 32 N=303, Wave 36 N=301, Wave 40 N=306

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

Average Spend and Price Sensitivity.

Average weight of purchase

The average consumer typically purchases **1.0kg** of Asian vegetables in September 2016, which is slightly higher than the previous waves.

▼ 0.9kg, Wave 32
▼ 0.9kg, Wave 36

Recalled last spend

The average recalled last spend in September 2016 is **$5.00**, which has slightly increased this wave.

▲ $5.10, Wave 32
▼ $4.60, Wave 36

Value for money

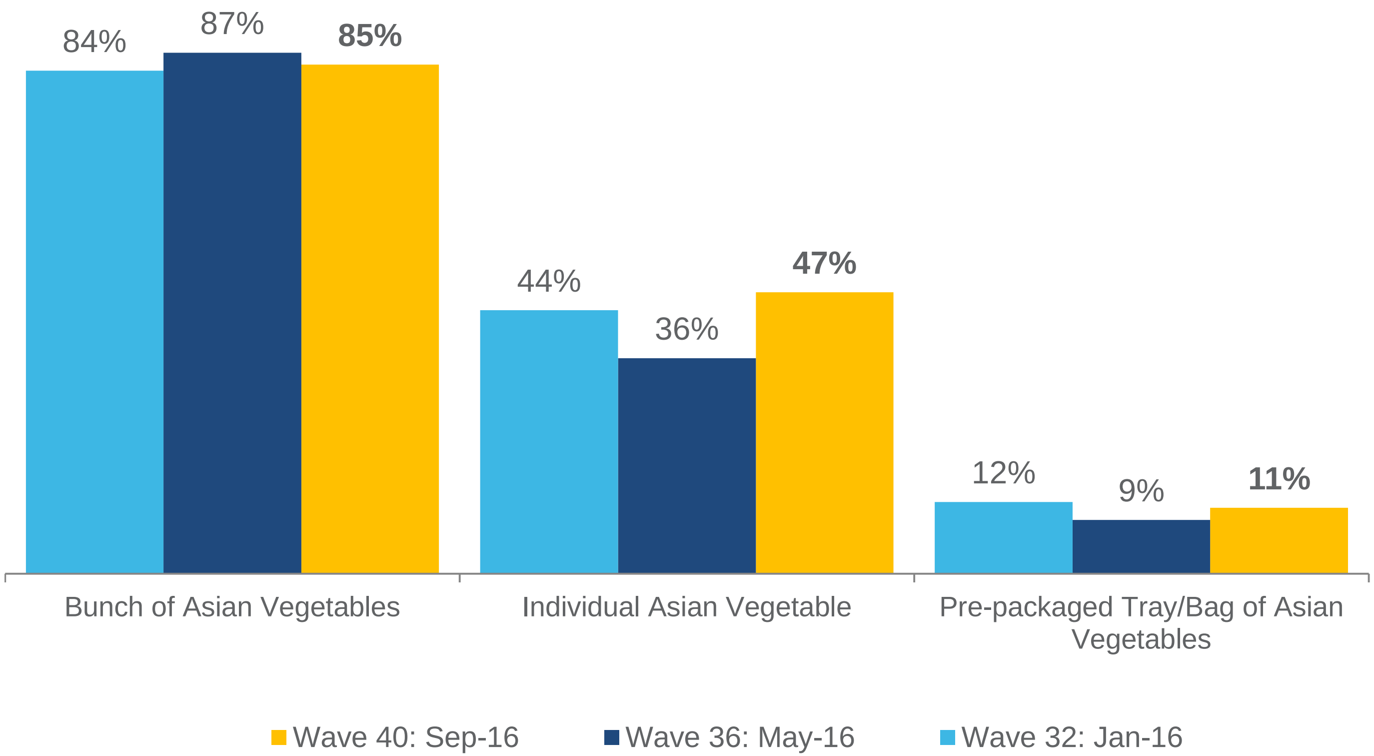
On average, consumers perceive Asian vegetables to be good value for money **(6.8/10)**, which has declined this wave.

▼ 6.6/10, Wave 32
▲ 7.3/10, Wave 36

Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typical purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 32 N=303, Wave 36 N=301, Wave 40 N=306

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

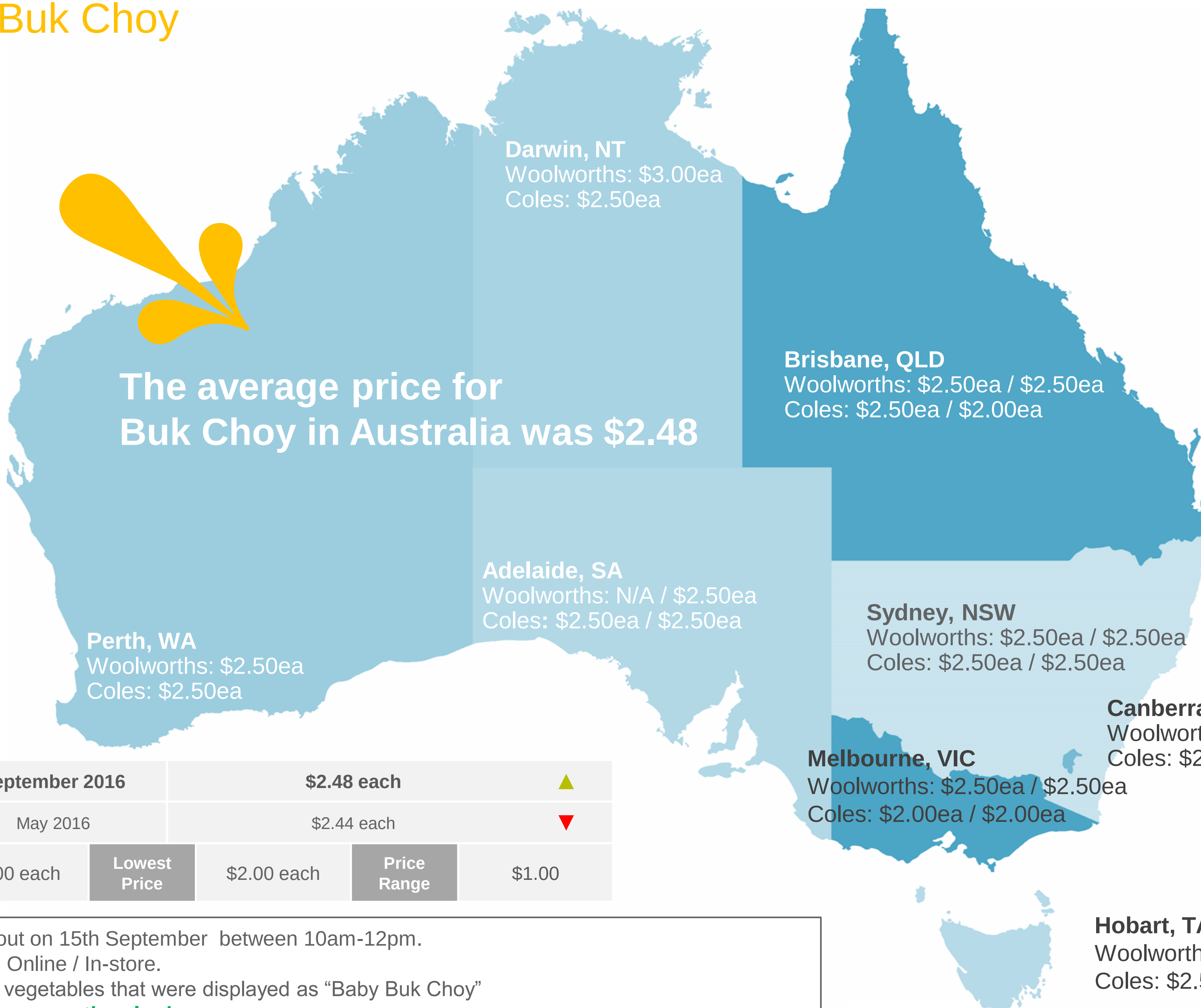
Bunched Asian vegetables continue to be the main format purchased, consistent with previous waves.



Q4b In what fresh formats do you typically purchase Asian vegetables (bok choy, choy sum etc.)?
Sample Wave 32 N=303, Wave 36 N=301, Wave 40 N=306

Online and In-store Commodity Prices.

Baby Buk Choy

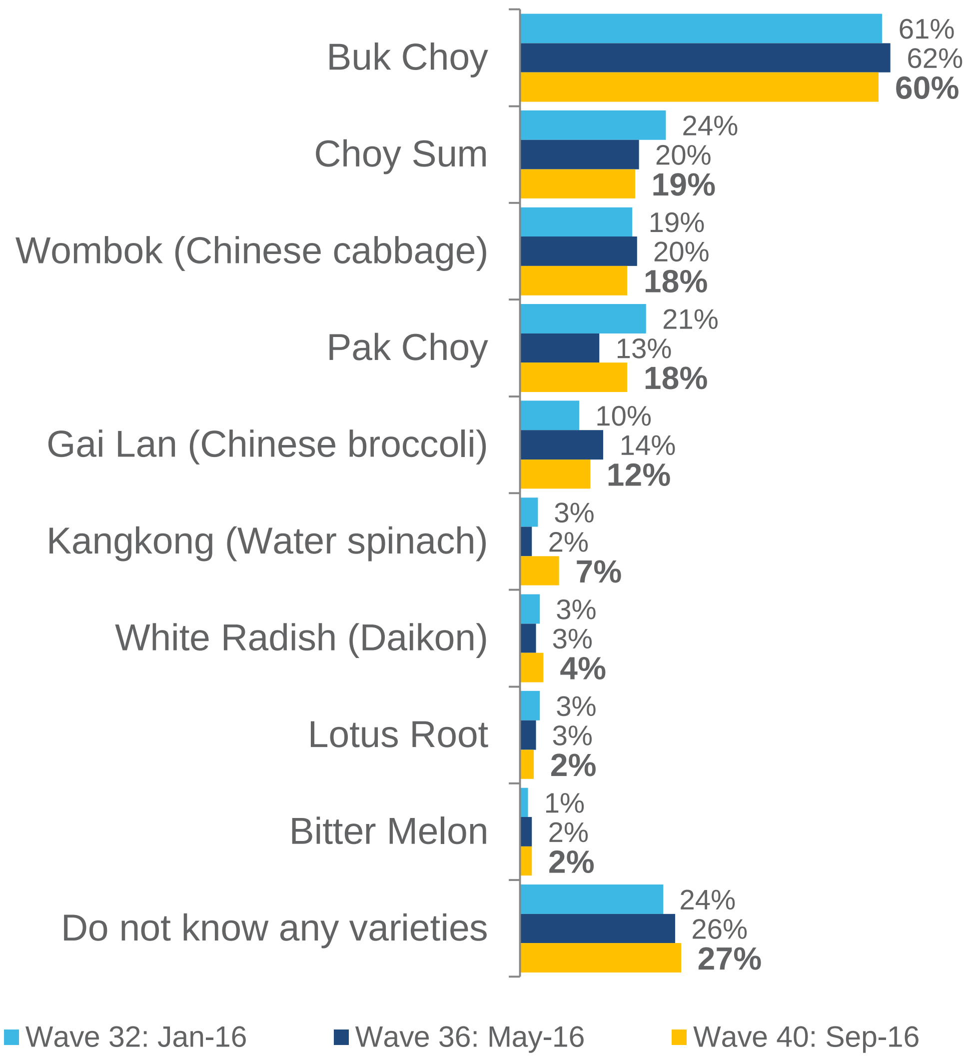


Average Price	**September 2016**		**$2.48 each**		▲
	May 2016		$2.44 each		▼
Highest Price	$3.00 each	**Lowest Price**	$2.00 each	**Price Range**	$1.00

Pricing was carried out on 15th September between 10am-12pm.
Prices are displayed Online / In-store.
Prices are based on vegetables that were displayed as "Baby Buk Choy"
Green text indicates promotional price.

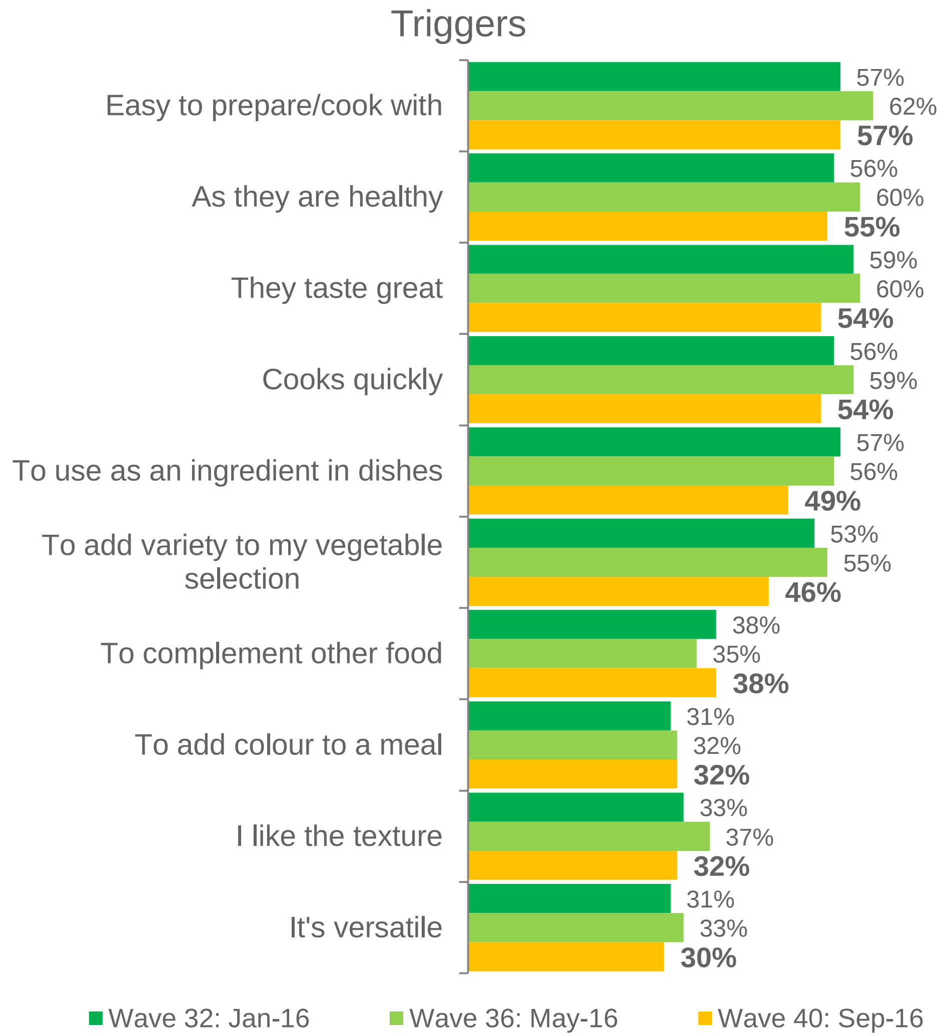
Awareness of Asian vegetable varieties has remained relatively consistent over the last three waves.

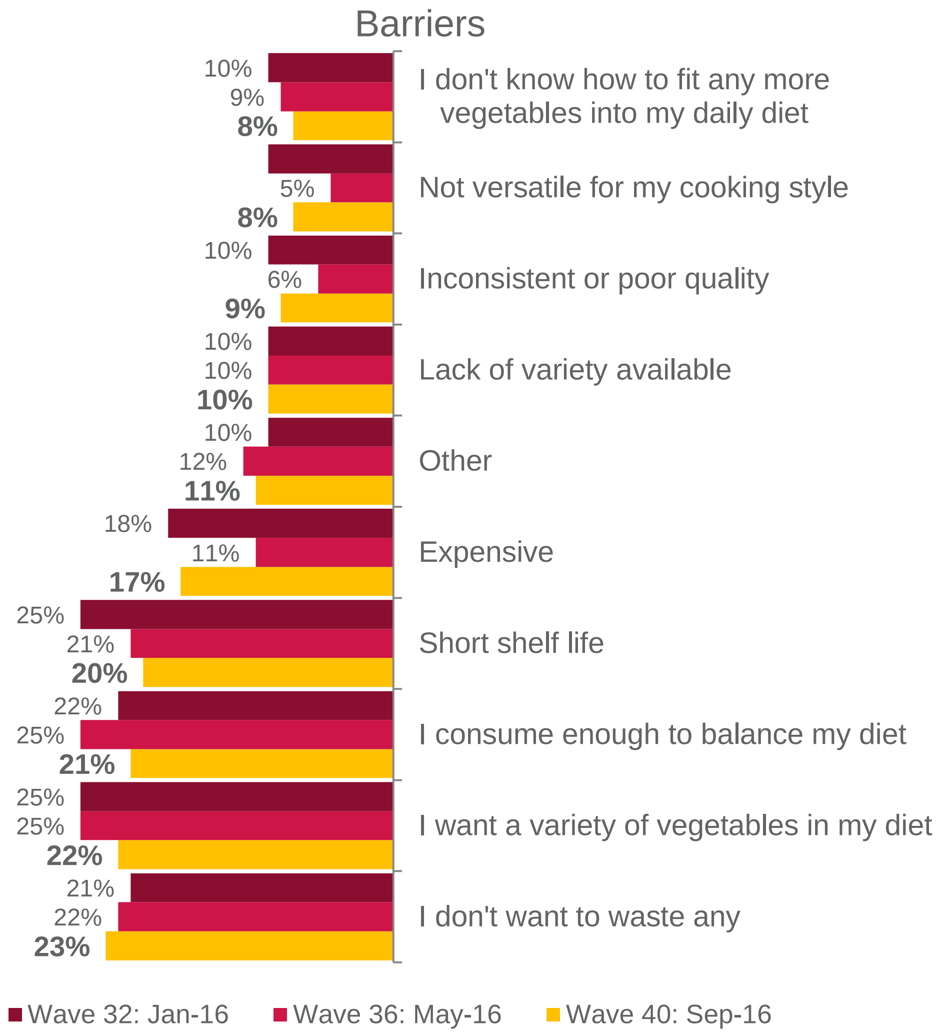
Buk Choy and Choy Sum have the greatest recall amongst consumers, with an increase in awareness of Pak Choy and Kangkong (Water Spinach) this wave.



Q6a. What varieties/types of <commodity> are you aware of? (unprompted)
Sample Wave 32 N=303, Wave 36 N=301, Wave 40 N=306

Ease of preparation and health are the main drivers of purchase. The key barriers to purchase are not wanting to waste any and wanting a variety of vegetables in their diet. Short shelf life has declined as a barrier to purchase over the last three waves.





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 32 N=303, Wave 36 N=301, Wave 40 N=306

Asian vegetables are generally eaten at dinner time, with quick meals increasing as a consumption occasion.

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

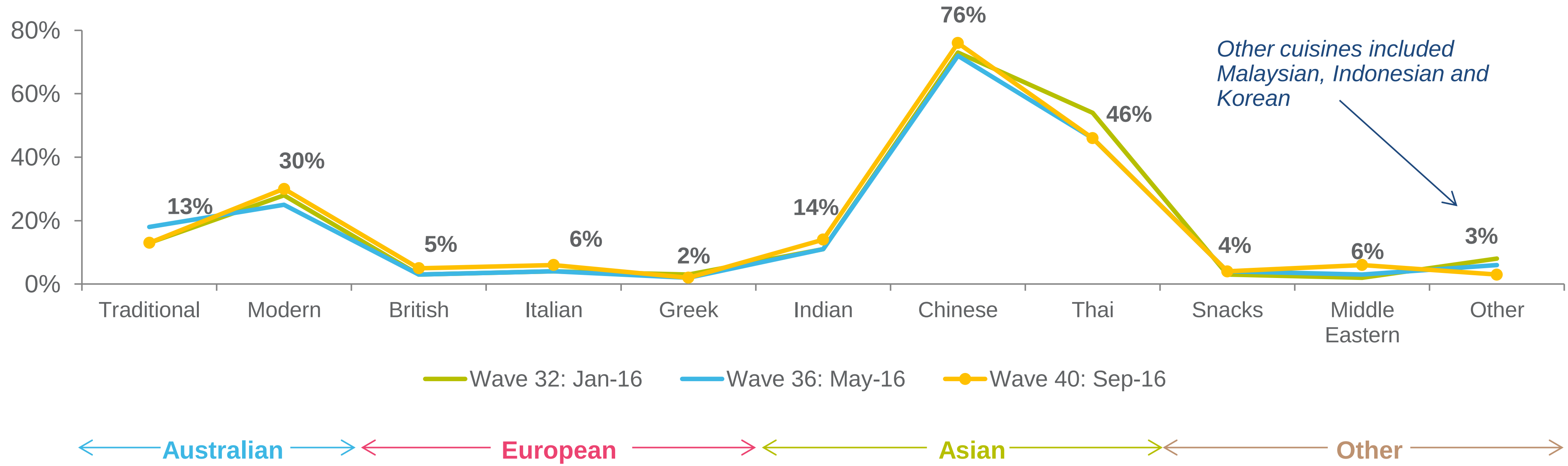
Top 5 Consumption Occasions

	Wave 36	Wave 40
Dinner	73%	**72%**
Family meals	51%	**57%**
Quick Meals	44%	**51%**
Weekday meals	47%	**49%**
Weekend meals	41%	**42%**

24% used Asian vegetables when cooking a new recipe

▼ 20%, Wave 36

Typical Cuisine Cooked



Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?
Sample Wave 32 N=303, Wave 36 N=301, Wave 40 N=306

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

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

Accompanying Vegetables

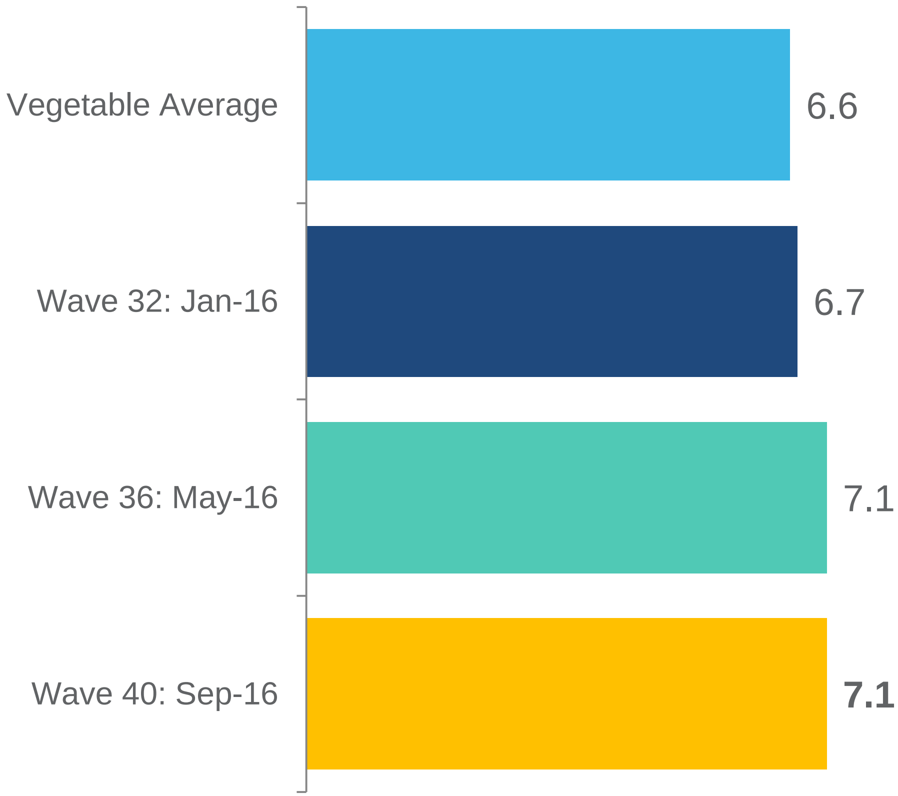
Onion	53%
Carrot	52%
Capsicum	50%
Garlic	45%
Green Peas	42%

Top Cooking Styles

	Wave 32	Wave 36	Wave 40
Raw	57%	41%	**51%**
Stir frying	51%	47%	**48%**
Steaming	36%	40%	**37%**
Sautéing	27%	27%	**29%**
Soup	16%	19%	**21%**
Boiling	16%	18%	**20%**
Baking	12%	7%	**13%**
Frying	12%	13%	**12%**
Slow Cooking	8%	10%	**10%**
Microwave	7%	9%	**8%**

Q9. How do you typically cook <commodity>?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
Sample Wave 32 N=303, Wave 36 N=301, Wave 40 N=306

Asian vegetable provenance has remained consistent this wave, and currently sits above the Vegetable Average.



7.9 ▽
Wave 36: **8.3**

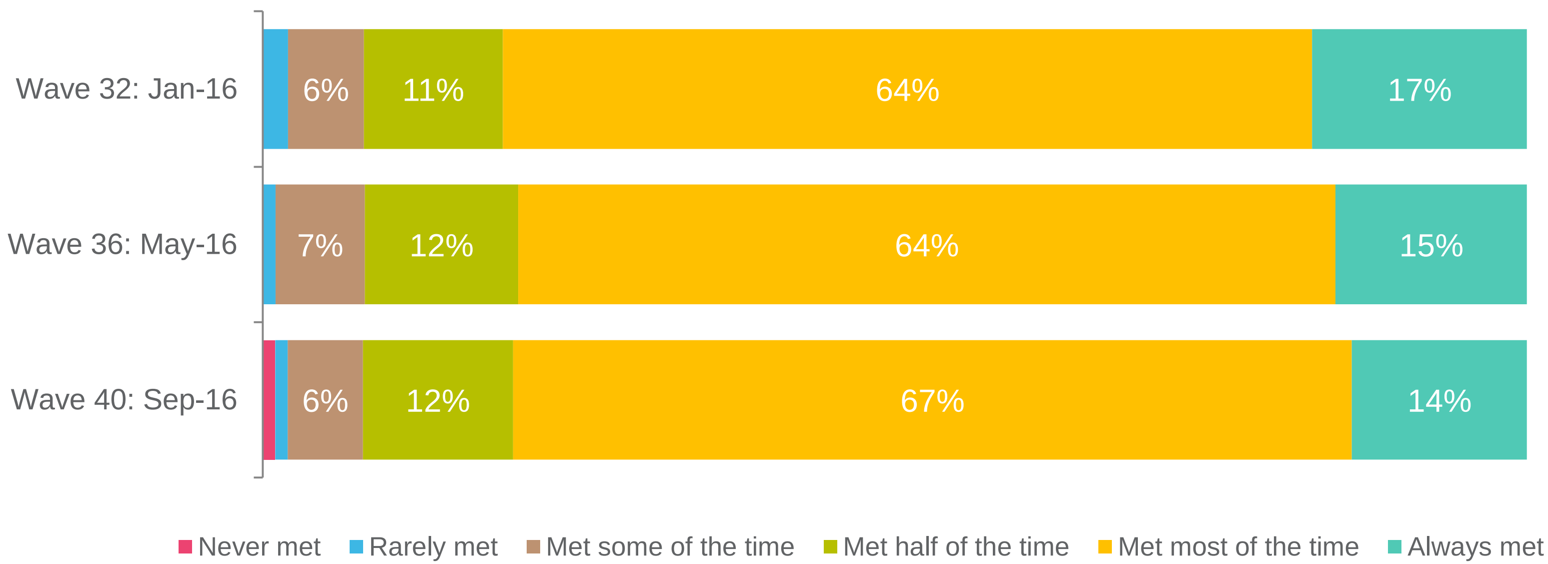
Q14. When purchasing <commodity>, how important is Provenance to you?
Q15. And when purchasing <commodity>, how important is that it is grown in Australia?
Mean scores out of 10.
Sample Wave 32 N=303, Wave 36 N=301, Wave 40 N=306

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

Expected to stay fresh for **6.3** days

▼ 5.7 days, Wave 32
▲ 6.5 days, Wave 36

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 32 N=303, Wave 36 N=301, Wave 40 N=306

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

Trends: Asian Vegetables

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

Innovative Asian Vegetables Launches:
L3M (June – September 2016)

Sainsbury's Lemongrass (UK)

Sainsbury's Lemongrass has been repackaged in a 4g recyclable pack. The product can be sliced finely and added to Asian style marinades, soups and stir fries.

Claims:
Ethical - Environmentally Friendly Package

Dieter Hein Snack To Go Chicken Breast Pieces with Asian Vegetables and Noodles (Germany)

Dieter Hein Snack To Go Hähnchenbrust-Filetstücke mit Asiatischer Gemüsezubereitung und Nudeln (Chicken Breast Pieces with Asian Vegetables and Noodles) are ready to heat in the microwave. This product is free from added flavour enhancers, preservatives and colourings, and retails in a 220g microwavable pack.

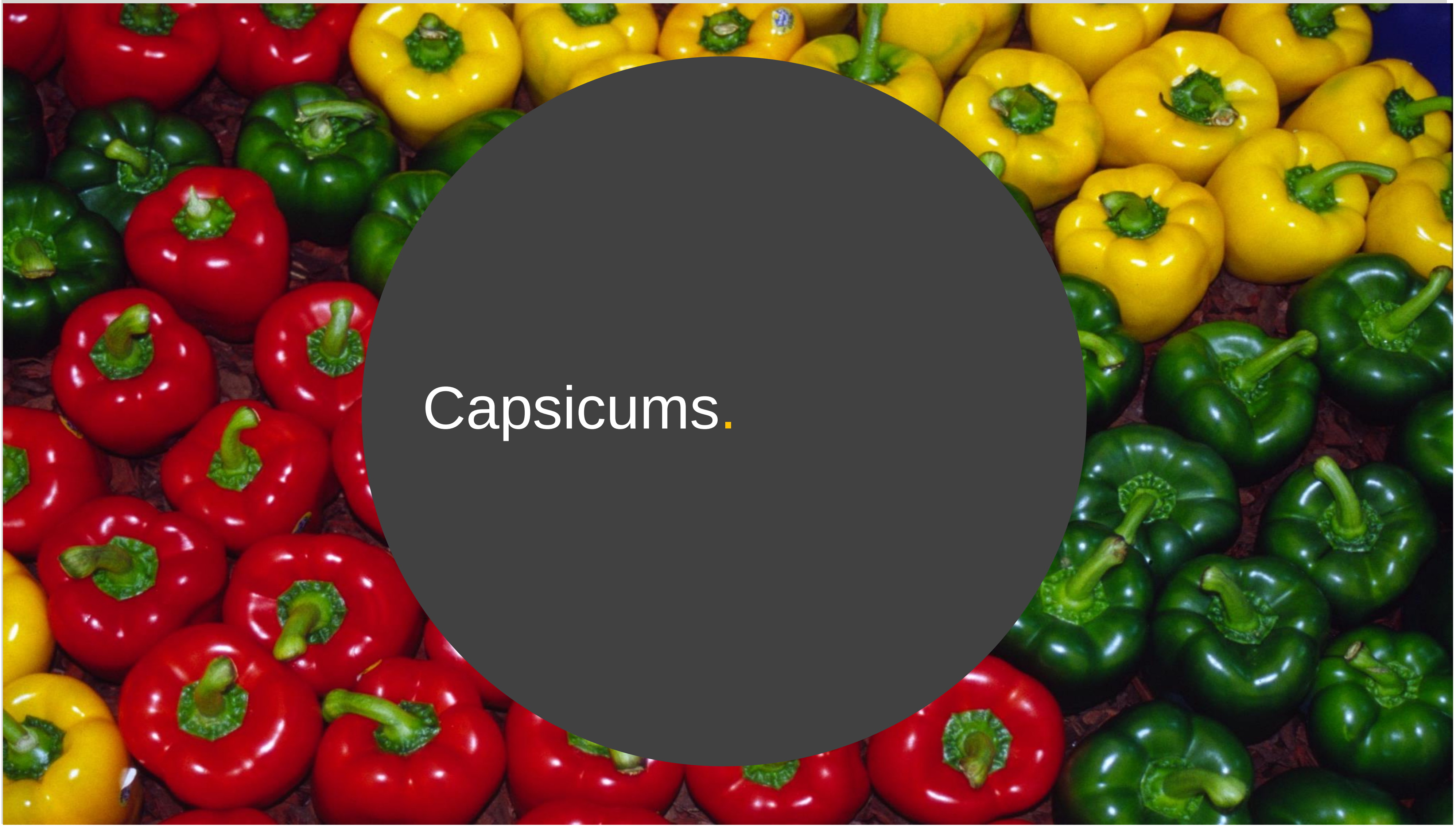
Claims:
No Additives/Preservatives, Microwaveable, On-the-Go, Ease of Use

Fresh Attitude Asian Mix Top Chop Kit (Canada)

Fresh Attitude Asian Mix Top Chop Kit is described as a restaurant inspired line of freshly cut vegetable mixes, rich in flavour and colours. This Asian blend contains five cabbage varieties including kale and kohlrabi, well known for their nutritional properties; carrots and cilantro to intensify the colours and, combined with the Asian vinaigrette's sesame and ginger notes, enhance this blend's flavour.

Claims:
Convenient Packaging, Social Media

Source: Mintel (2016)



Capsicums.

There was an increase in purchase occasions this wave. Consumption frequency remains relatively consistent.

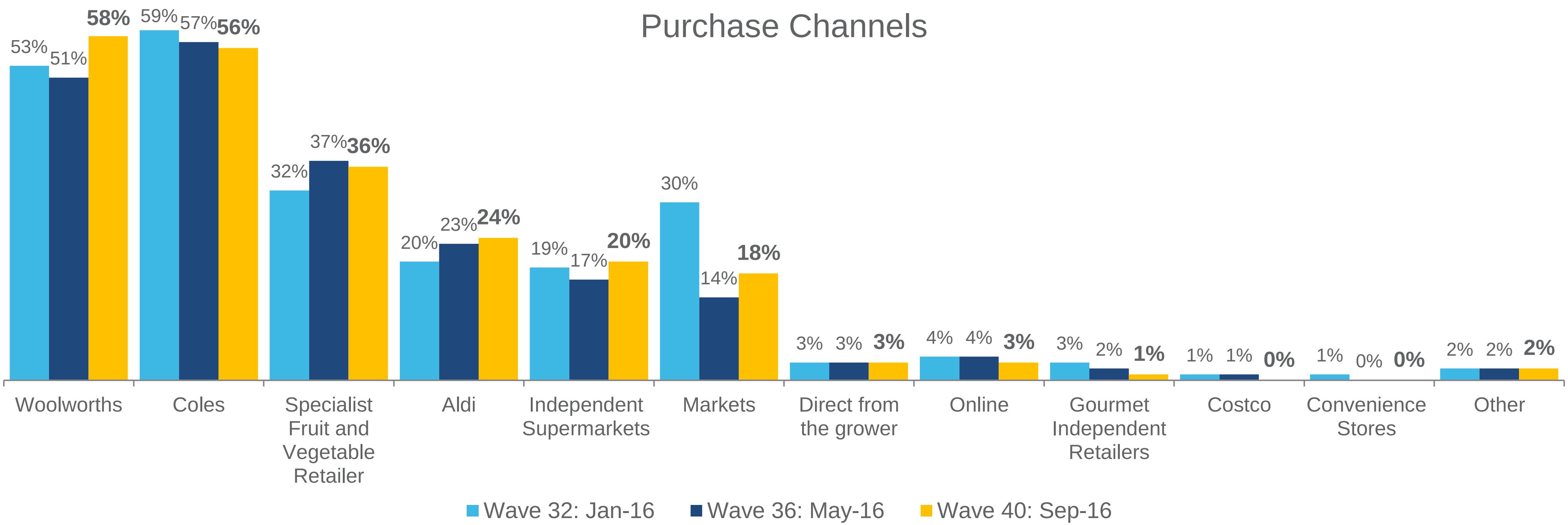
Capsicum is generally purchased from mainstream and specialist retailers, with purchase from Aldi consistently trending upwards.

Average Purchase **4.3** times per month

▼ 4.2 times, Wave 32
▼ 3.7 times, Wave 36

Average Consumption **9.5** times per month

▲ 10.5 times, Wave 32
▲ 9.6 times, Wave 36



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 32 N=308, Wave 36 N=306, Wave 40 N=302

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

Average Spend and Price Sensitivity

Average weight of purchase

The average consumer typically purchased **600g** of capsicum in September 2016, consistent with the previous wave.

▲ 700g, Wave 32
— 600g, Wave 36

Recalled last spend

The average recalled last spend for capsicum was **$3.80**, which has declined over the last three waves.

▲ $4.20, Wave 32
▲ $4.00, Wave 36

Value for money

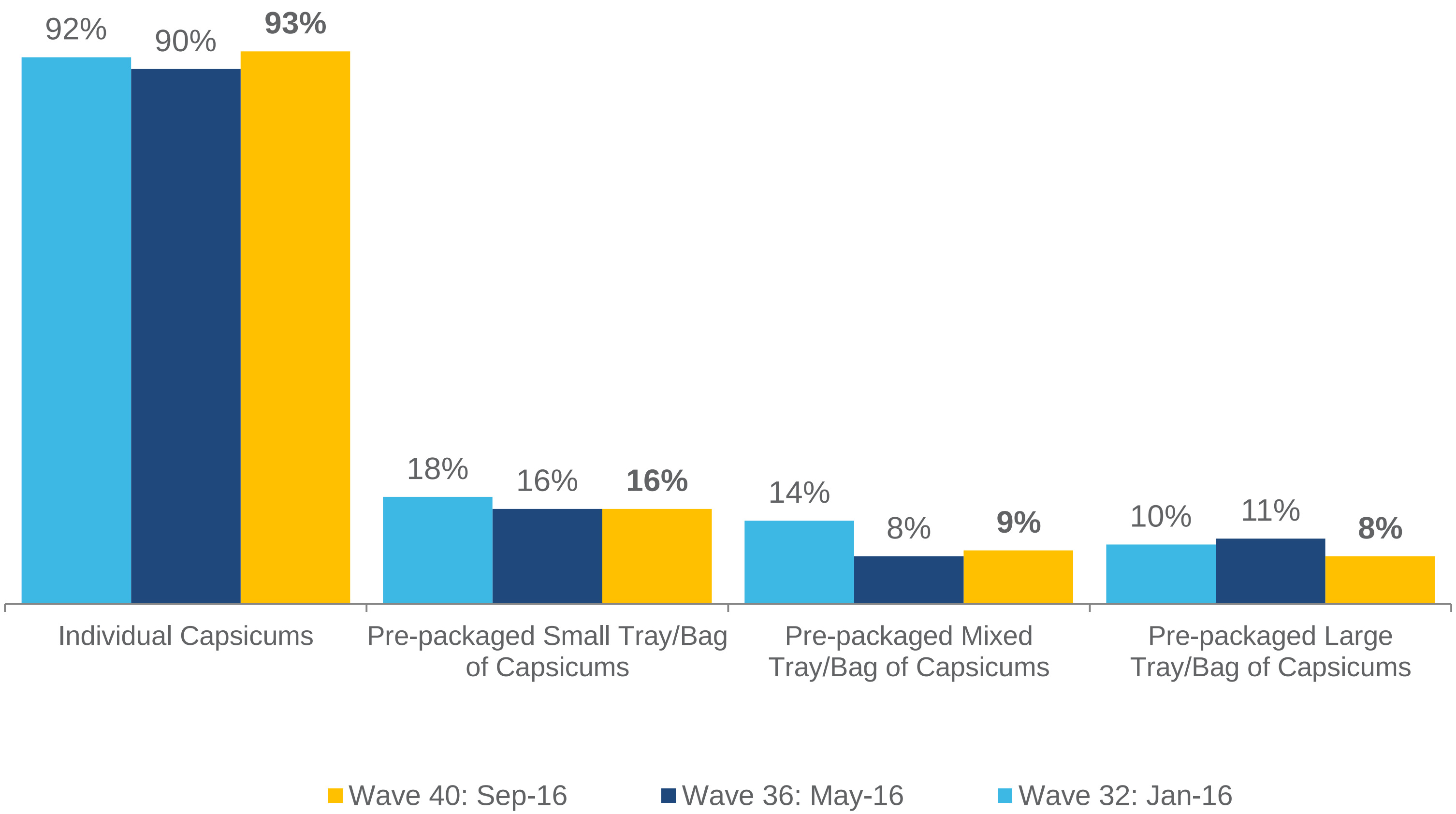
On average, consumers perceived capsicum to be good value for money **(6.3/10)**, which is consistent with the previous wave.

▼ 5.9/10, Wave 32
— 6.3/10, Wave 36

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 32 N=308, Wave 36 N=306, Wave 40 N=302

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

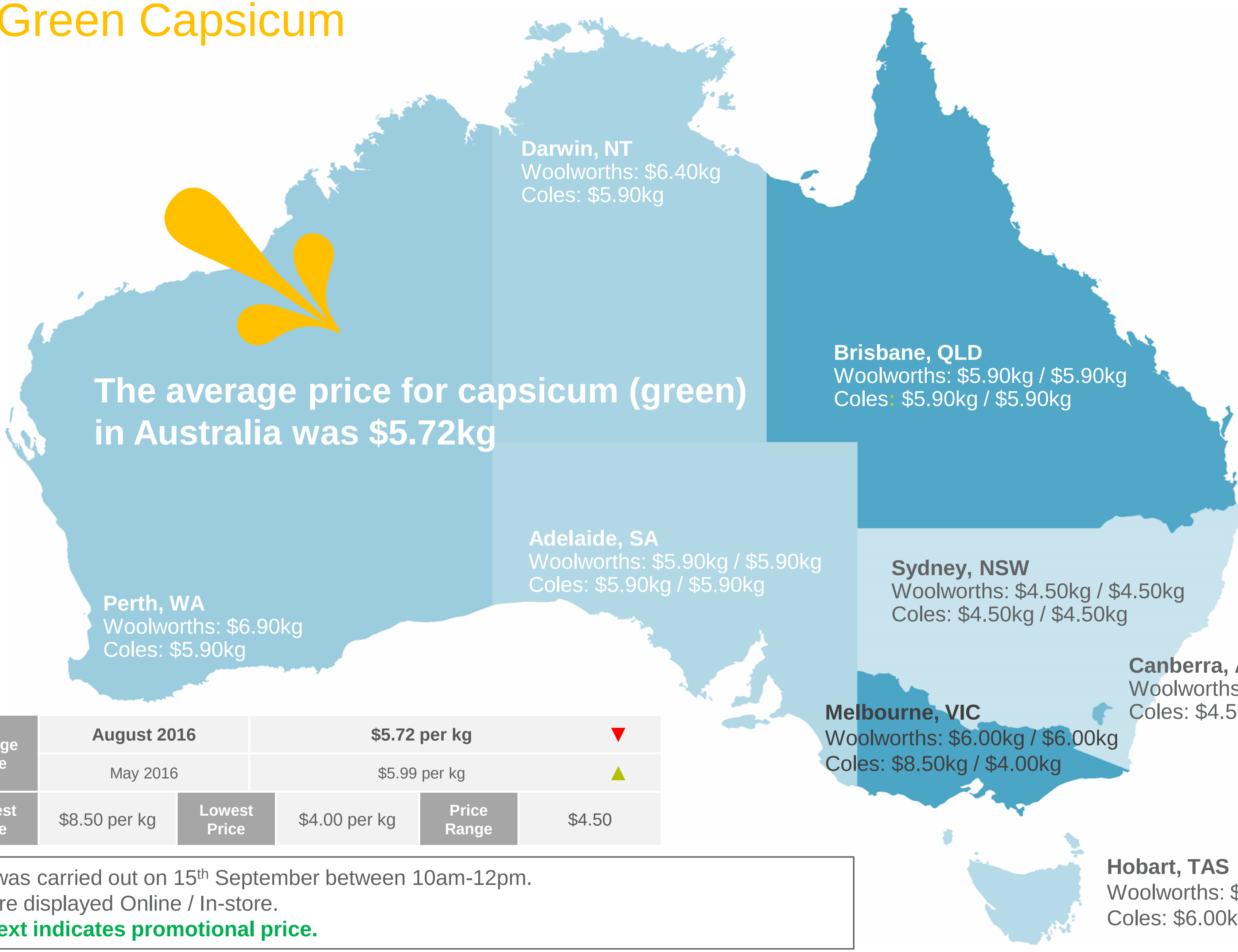
Individual capsicums remain the key format for purchase, consistent with previous waves.



Q4b. In what fresh formats do you typically purchase Capsicums?
Sample Wave 32 N=308, Wave 36 N=306, Wave 40 N=302

Online and In-store Commodity Prices

Green Capsicum

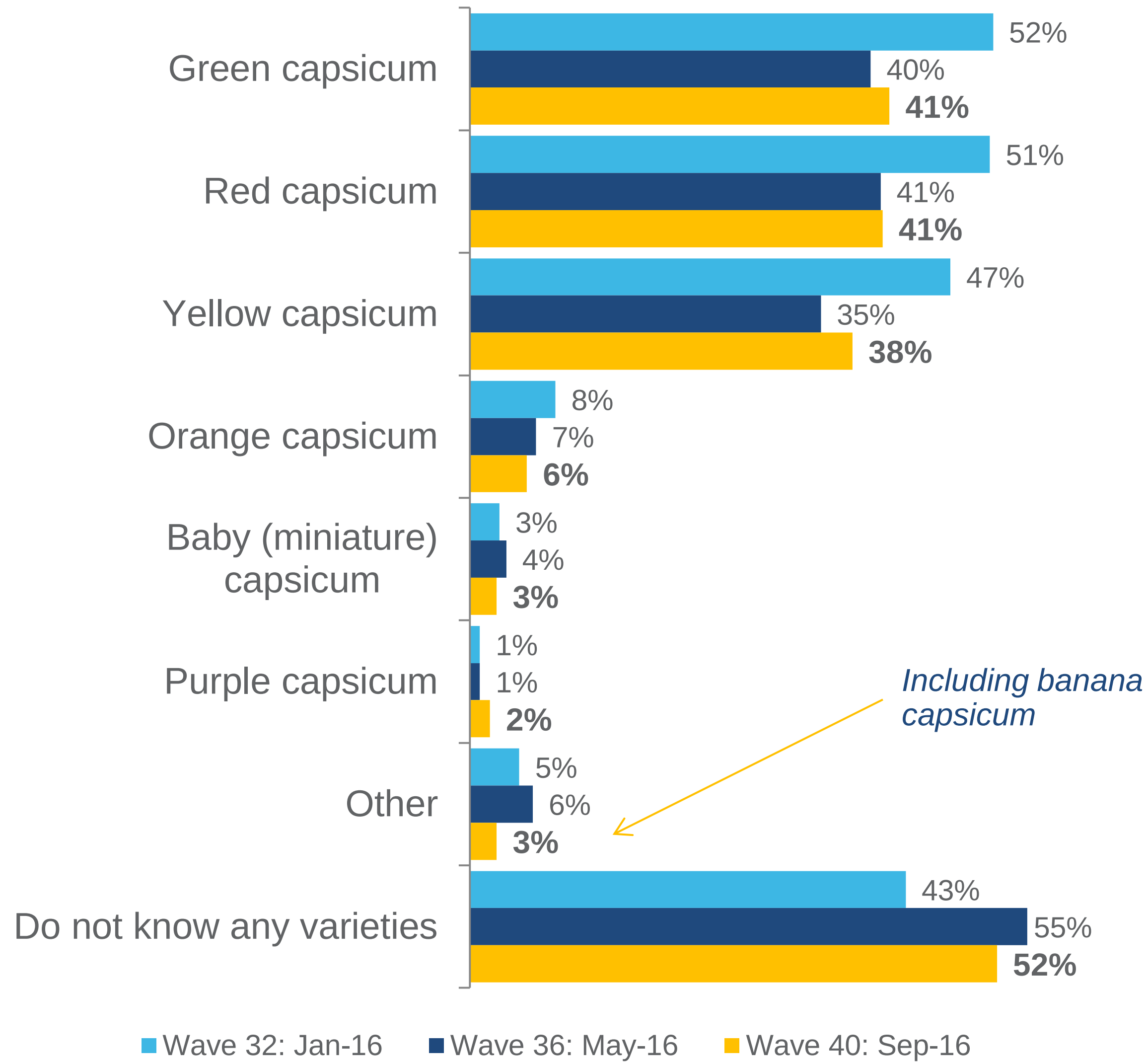


Average Price	**August 2016**	**$5.72 per kg**	▼
	May 2016	$5.99 per kg	▲

Highest Price	$8.50 per kg	Lowest Price	$4.00 per kg	Price Range	$4.50

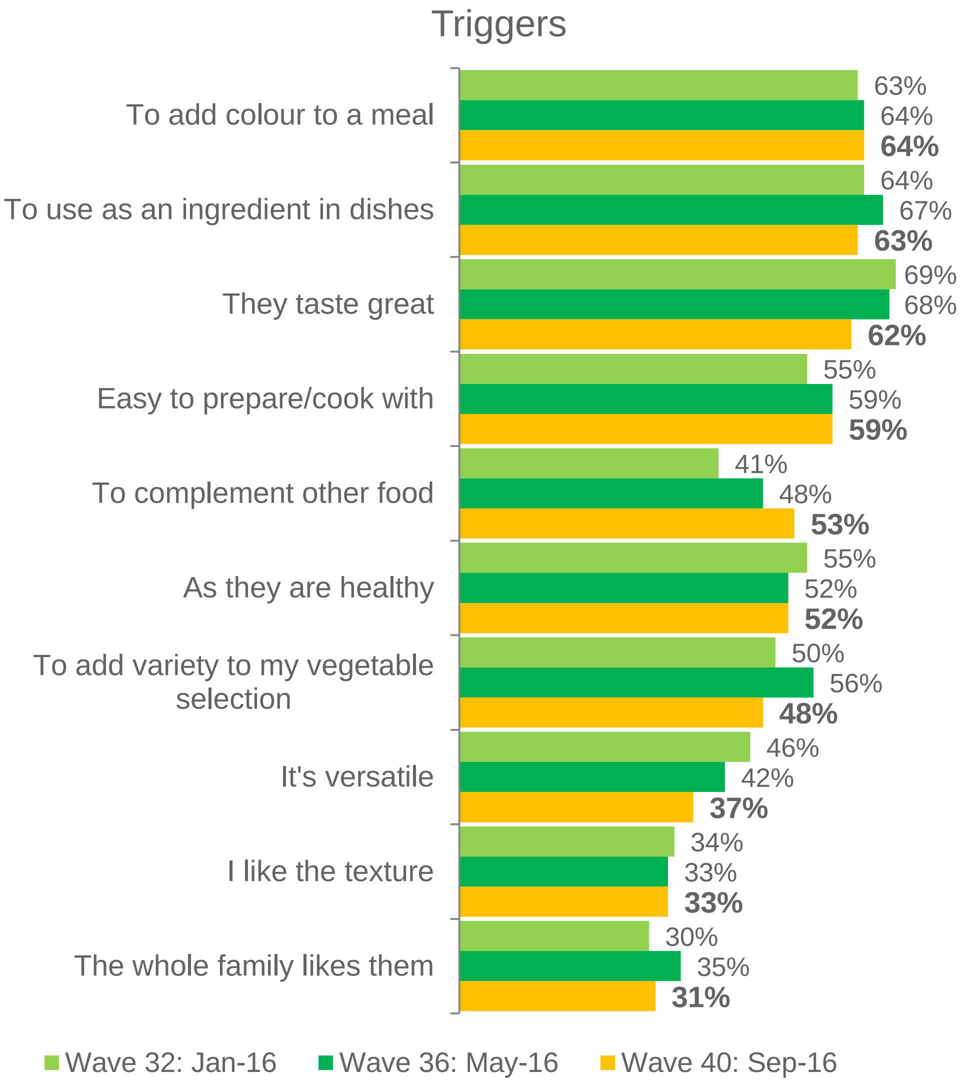
Pricing was carried out on 15th September between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates promotional price.

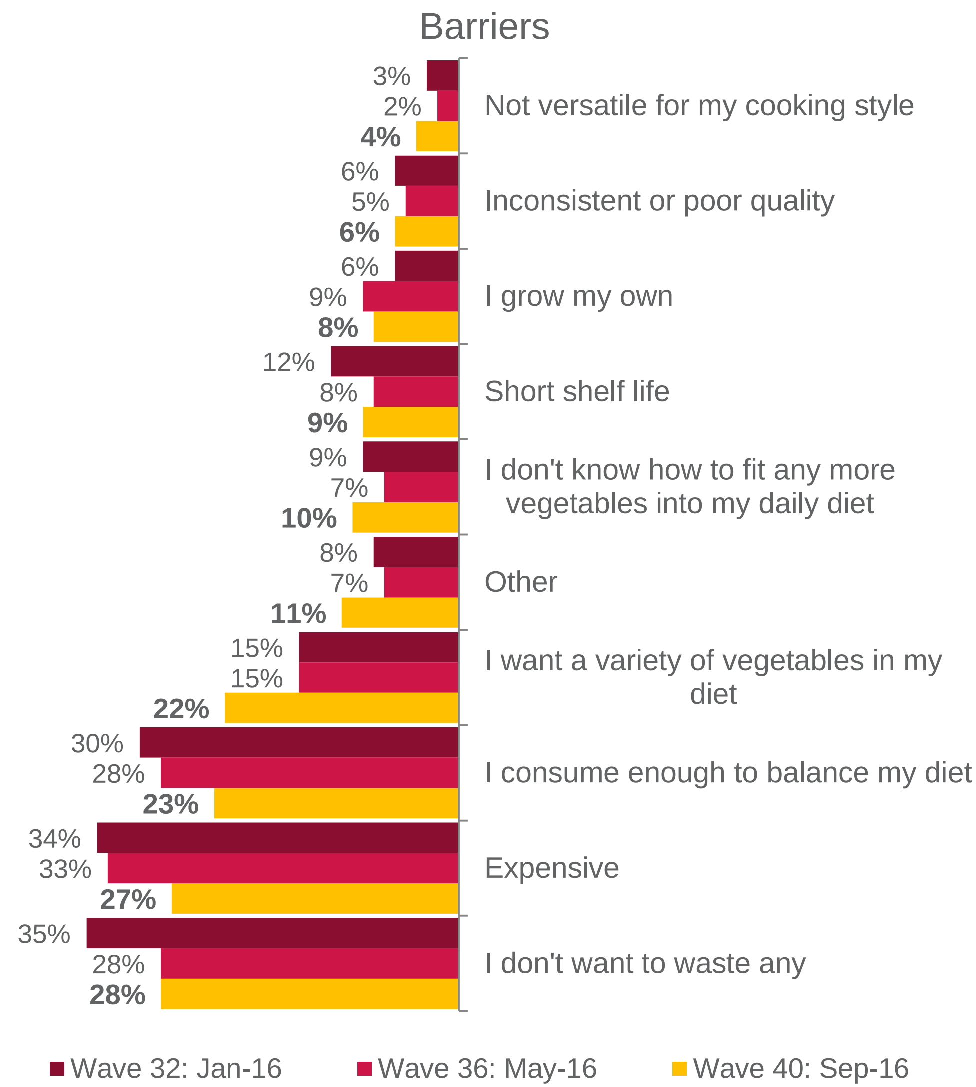
Green, red and yellow capsicums have the greatest level of recall. More than half of all consumers could not recall a type of capsicum this wave.



Q6a. What varieties of <commodity> are you aware of? (unprompted)
Sample Wave 32 N=308, Wave 36 N=306, Wave 40 N=302

The key triggers to purchase are adding colour to a meal and using as an ingredient in dishes. The main barriers to purchase are not wanting to waste any and being too expensive. There has been an increasing trend to complement other food as a trigger to purchase.





Horticulture Innovation Australia

colmar brunton.

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 32 N=308, Wave 36 N=306, Wave 40 N=302

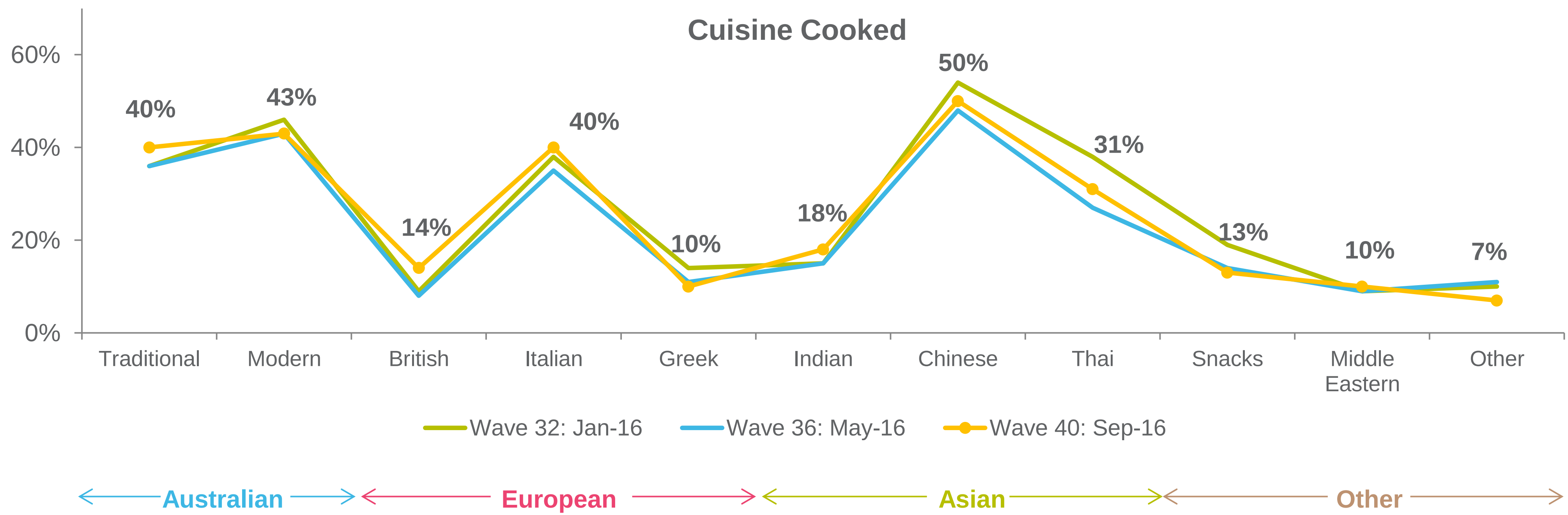
Capsicums are most frequently cooked in Asian, Australian and Italian cuisine, particularly Chinese and Modern Australian. Dinner remains the main consumption occasion.

Top 5 Consumption Occasions

	Wave 36	Wave 40
Dinner	74%	**75%**
Family meals	58%	**60%**
Weekday meals	52%	**55%**
Quick meals	49%	**50%**
Weekend meals	45%	**48%**

21% used capsicum when cooking a new recipe

▲ 22%, Wave 36



Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?
Sample Wave 32 N=308, Wave 36 N=306, Wave 40 N=302

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

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

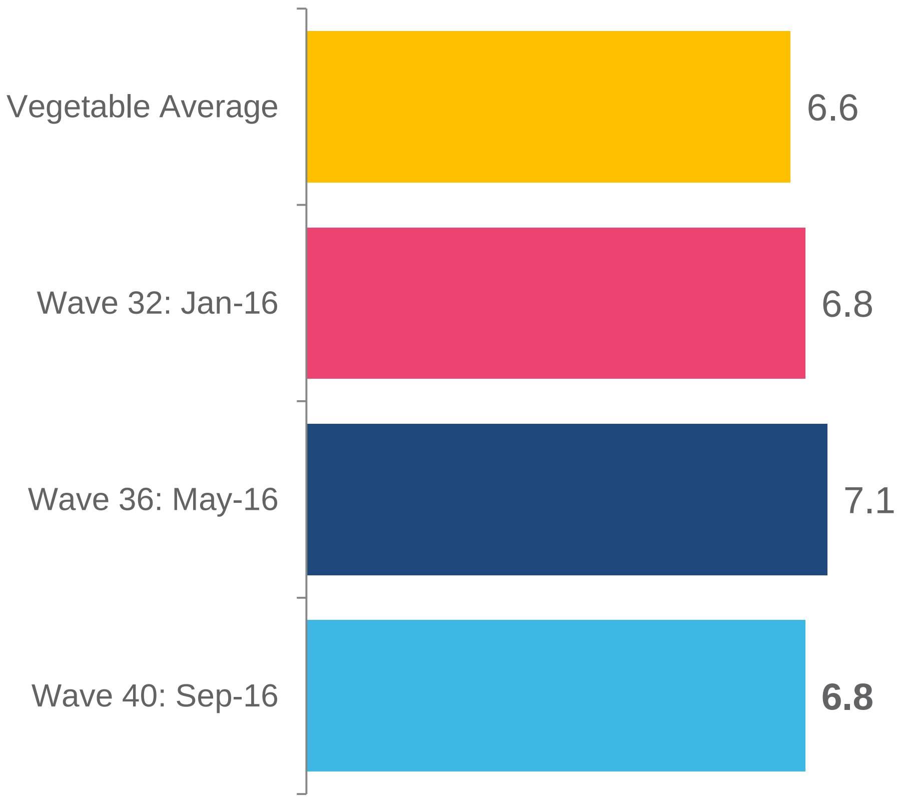
Accompanying Vegetables

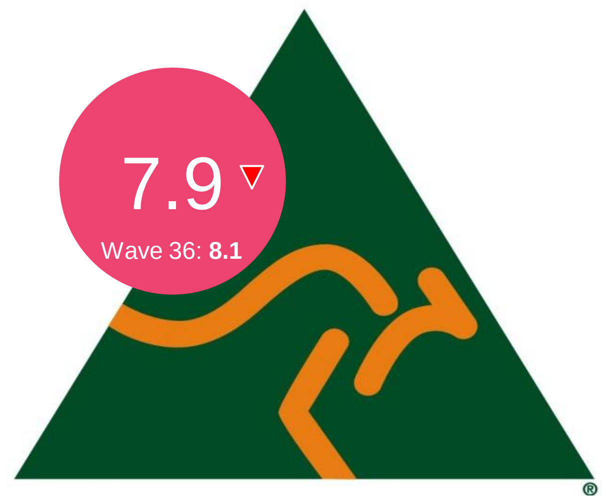
Onion	59%
Tomato	58%
Carrot	51%
Lettuce	32%
Potato	32%

Top 10 Cooking Styles			
	Wave 32	Wave 36	Wave 40
Stir frying	78%	74%	**71%**
Raw	60%	57%	**57%**
Roasting	33%	33%	**30%**
Frying	24%	30%	**30%**
Sautéing	26%	23%	**27%**
Slow Cooking	19%	24%	**24%**
Grilling	25%	20%	**23%**
Baking	20%	18%	**21%**
Soup	12%	19%	**17%**
Steaming	13%	10%	**10%**

Q9. How do you typically cook <commodity>?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
Sample Wave 32 N=308, Wave 36 N=306, Wave 40 N=302

The importance of Capsicum provenance has seen a decline this wave. Overall, consumers still find it very important to know that capsicums are grown in Australia.



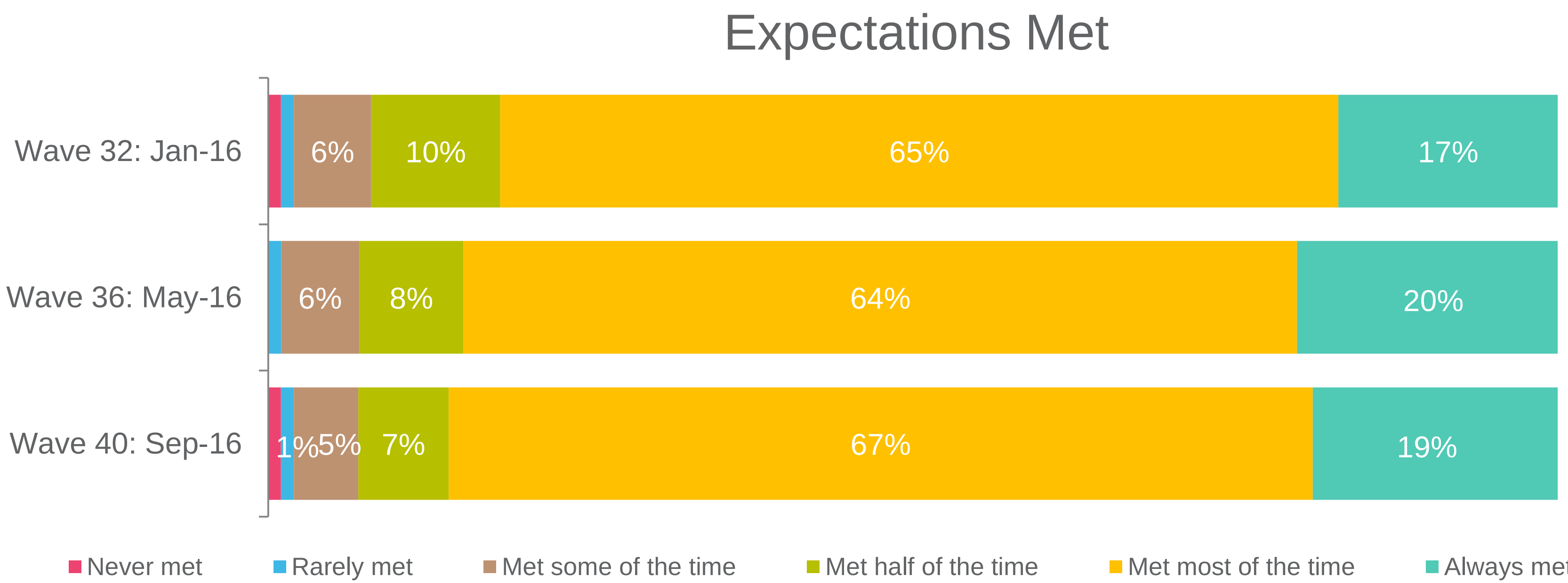


Q14. When purchasing <commodity>, how important is Provenance to you?
Mean scores out of 10.
Sample Wave 32 N=308, Wave 36 N=306, Wave 40 N=302

Capsicums are expected to remain fresh for approximately nine days once purchased, relatively consistent with the previous wave. Expectations of freshness are being met at least most of the time.

Expected to stay fresh for **8.7** days

▼ 8.0 days, Wave 32
▲ 9.0 days, Wave 36



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 32 N=308, Wave 36 N=306, Wave 40 N=302

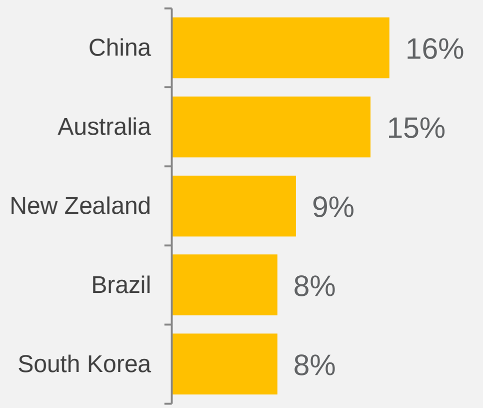
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Trends: Capsicums

Capsicum Global NPDs.
June – September 2016

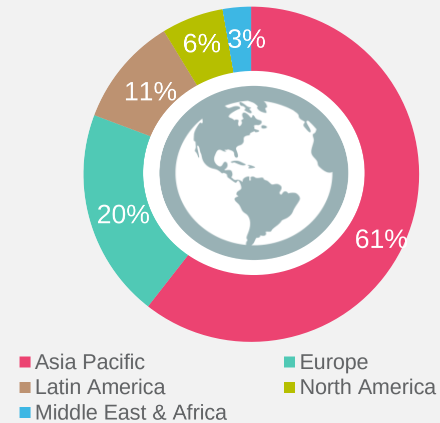
There were 218 products launched over the last three months that contained Capsicum as an ingredient. A large portion of these products were launched in Asia Pacific; China, Australia and New Zealand. New products were meals, snacks and sauces.

Country

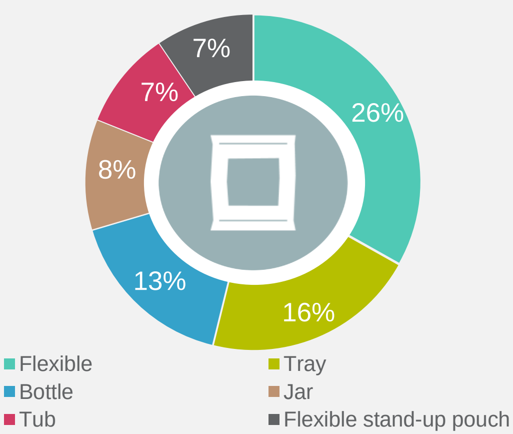


218 Global Launches

Region



Top Pack Formats



Categories

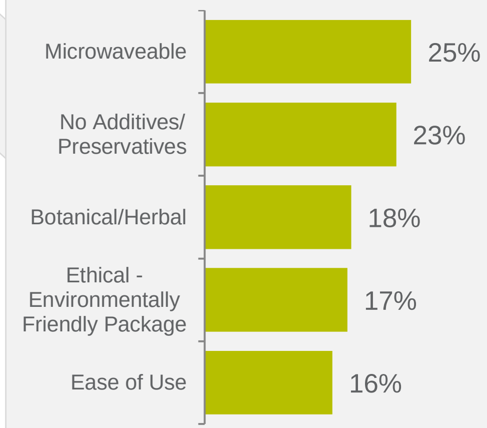
Meals 28%

Snacks 19%

Sauces & Seasonings 13%

Processed Products 11%

Top Claims



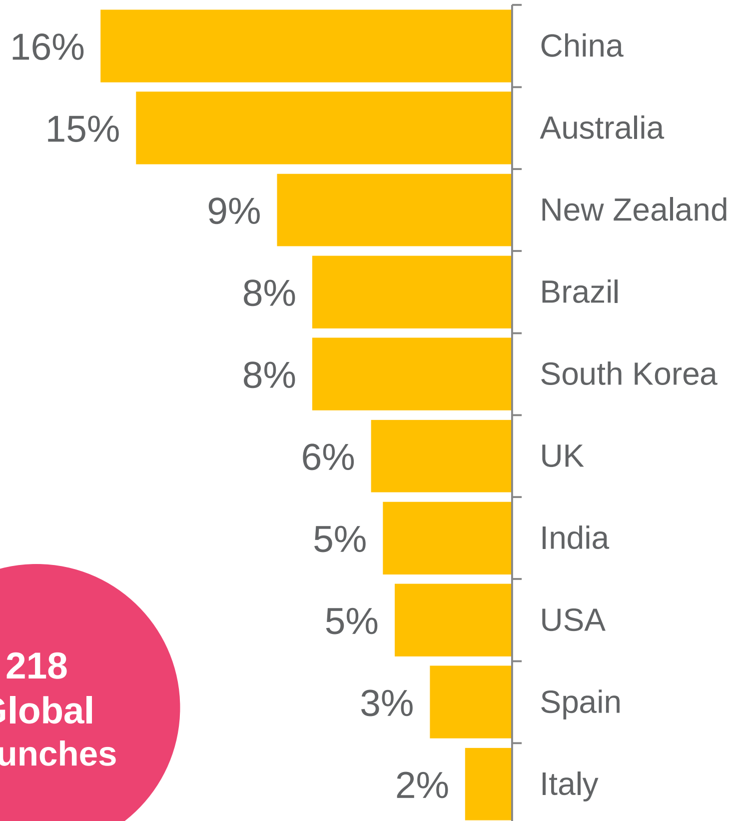
Capsicum Product Launches:
Last 3 Months (June – September 2016)
Summary

- There were 218 products launched globally in the last three months that contained capsicum as an ingredient.
- There were 32 products launched in Australia, the most launches of any country this wave.
- Top countries for launches were China (16%), Australia (15%), New Zealand (9%) and Brazil (8%), with just under two thirds of products launched in the Asia Pacific region.
- Flexible packs (26%) and trays (16%) were the most used forms of packaging over the last three months.
- Meals (28%) and snacks (19%) were the main launch category for products containing capsicum.
- Product claims used were microwaveable (25%), no additives/preservatives (23%), and botanical/herbal (18%).
- The most innovative product was a Paella Set from Germany (examples of these can be found in the following pages).

Source: Mintel (2016)

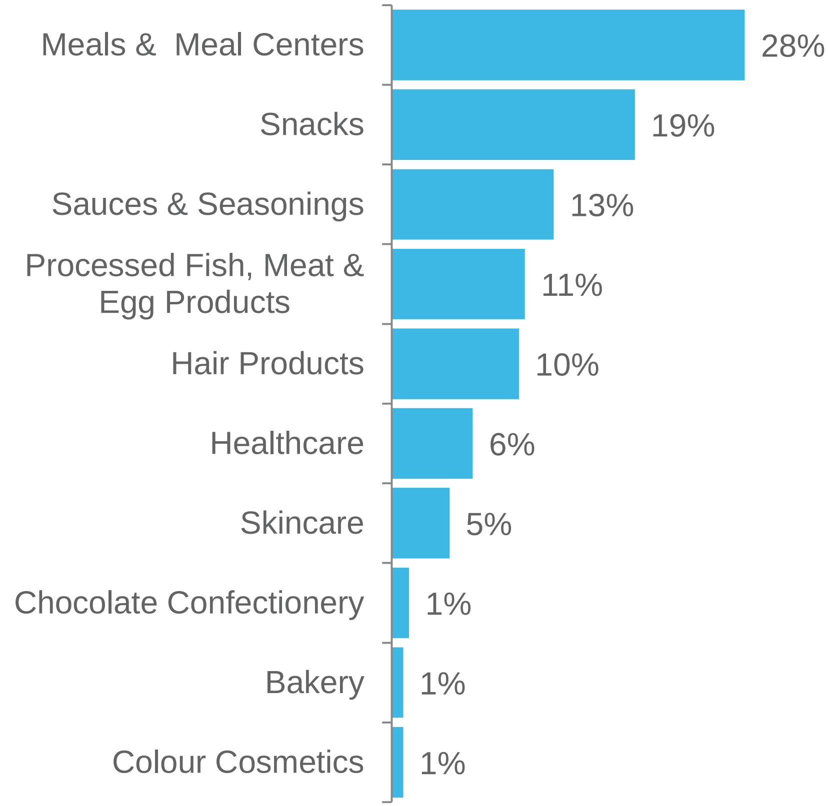
China and Australia had the greatest number of capsicum product launches over the last 3 months. Meals & meal centers, and snacks were the main launch categories this wave.

Top Launch Countries



218 Global Launches

Top Launch Categories



The main claims globally were microwaveable and no additives &. Flexible packaging and trays are primarily used for capsicum products.

Pack Formats Used

Region	Pack Format	%
Global	Flexible	26%
Global	Tray	16%
Global	Bottle	13%
Asia Pacific	Flexible	29%
Asia Pacific	Tray	20%
Asia Pacific	Tub	11%
Europe	Flexible	27%
Europe	Tray	16%
Europe	Bottle	14%

Top Claims Used

Region	Claim	%
Global	Microwaveable	25%
Global	No Additives/Preservatives	23%
Global	Botanical/Herbal	18%
Asia Pacific	Microwaveable	36%
Asia Pacific	No Additives/Preservatives	28%
Asia Pacific	Ethical - Environmentally Friendly Package	23%
Europe	Botanical/Herbal	27%
Europe	Vegetarian	23%
Europe	No Additives/Preservatives	20%

Only regions with n >30 are displayed

Innovative Capsicum Launches:
L3M (June – September 2016)

Kettle Bites Coconut, Lime & Chilli Wholegrain Waves (UK)

Kettle Bites Coconut, Lime & Chilli Wholegrain Waves are new to the range. Baked not fried, these multigrain vegetarian snacks with coconut, lime and chilli seasoning have only 96 calories per pack and contain 50% less fat than standard ready salted crisps.

Claims:
No Additives/Preservatives, Low/No/Reduced Calorie, Low/No/Reduced Fat, Vegetarian, Wholegrain, Social Media

Foodmily Chuncheon Style Mildly Spicy Stir-Fried Chicken (South Korea)

Foodmily Chuncheon Style Mildly Spicy Stir-Fried Chicken is made from Korean chicken and matured in a rich flavour marinade. This easy to cook product retails in a 600g pack that serves two.

Claims:
Ease of Use

Apotek's Onion Shampoo (Russia)

Apotek's Lukovyy Shampun' (Onion Shampoo) has been formulated with: onion extract, to increases hair volume, and effectively moisturise; and red pepper extract, to promote hair cell growth, stimulate blood circulation, improve capillary blood flow, normalise metabolism, strengthen and nourish hair bulbs, restore damaged hair structure, and stimulate hair growth, helping fight baldness.

Claims:
Botanical/Herbal, Anti-Hairloss, Damaged Hair, Moisturising / Hydrating

La Gina La Zuppa Spring Vegetable & Wholegrain Rice Soup (New Zealand)

La Gina La Zuppa Spring Vegetable & Wholegrain Rice Soup is made with chicken stock and is described as an uplifting blend of spring vegetables with wholesome brown rice. The halal certified product is 99% fat-free, gluten- and dairy- free and contains no artificial additives. The soup can be microwaved in two minutes and retails in a recyclable 420g pack.

Claims:
No Additives/Preservatives, Low/No/Reduced Fat, Microwaveable, Halal, Gluten-Free, Wholegrain, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Package

Source: Mintel (2016)

Innovative Capsicum Launches:
L3M (June – September 2016)

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

Asda Piri Piri Chicken Breast Fillets (UK)

Asda Piri Piri Chicken Breast Fillets have been relaunched in a newly designed packaging and under a new brand name, previously known as Asda Chosen by You Easy Meals. The microwaveable product features piri piri marinated cooked chicken breasts, is succulent, can be enjoyed hot or cold, contains no artificial colours or flavours, and is ready to eat. It retails in a recyclable 200g pack.

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

Tasty Pot Co Meal 5 Grain Superpot (Singapore)

Tasty Pot Co Meal 5 Grain Superpot contains 50% vegetables, quinoa, chia, roast vegetables and chermoula dressing. The 100% natural and microwaveable product is low in fat, is high in fibre and is free from gluten and dairy. It provides two of daily vegetables and retails in a 350g pack bearing the 2013 Winner of the Healthy Food Awards.

Claims:
All Natural Product, High/Added Fiber, Low/No/Reduced Fat, Microwaveable, Gluten-Free, Low/No/Reduced Allergen

The Black Farmer Beef & Cheese Burgers (UK)

The Black Farmer Beef & Cheese Burgers are made from a blend of 100% British beef, herbs, spices and Cheddar cheese. The gluten free product is suitable for home freezing, formulated with British beef, and retails in a 226g pack containing two units, and featuring the Facebook, Twitter, Instagram and YouTube logos, and a QR code.

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

Source: Mintel (2016)

Innovative Capsicum Launches:
L3M (June – September 2016)

Tapas & More Paella Set (Germany)

Tapas & More Paella Set is a ready mixture for paella, and consists of 206g of rice and 250ml of broth. This product serves two to three people, and bears the Corporate Social Responsibility logo.

Claims:
Ethical - Human, Ease of Use

Bodega Spanish Salad (UK)

Bodega Spanish Salad comprises quinoa and green lentils in a rich tomato marinade with yellow semi-dried tomatoes, Iberico cheese, chilli pepper pearls and salty capers. It is made with gluten-free ingredients, and retails in a 185g pack bearing the Facebook and the Antipasti Society logos.

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

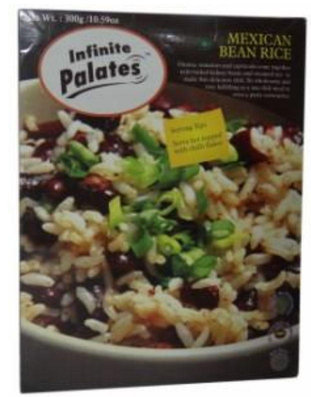
Foodmily Chuncheon Style Spicy Stir-Fried Chicken (South Korea)

Foodmily Chuncheon Style Spicy Stir-Fried Chicken is made from domestic chicken, marinated and matured in a rich flavoured sauce. This easy to cook product retails in a 600g pack that serves two.

Claims:
Ease of Use

Infinite Palates Mexican Bean Rice (India)

Infinite Palates Mexican Bean Rice is now available. The vegetarian, ready-to-eat product features onions, tomatoes and capsicum with boiled kidney beans and steamed rice, and can be used as a one-dish meal or a party centrepiece and served hot topped with chilli flakes. It is 100% natural and mildly spicy, does not require preparation, and is free from preservatives, artificial colours, flavours and monosodium glutamate



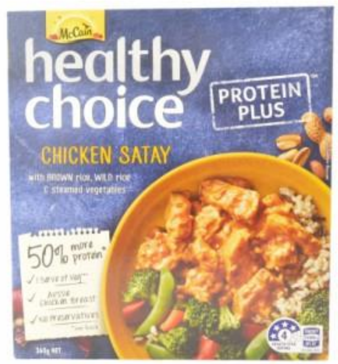
Claims:
No Additives/Preservatives, All Natural Product, Microwaveable, Vegetarian, Ease of Use

Source: Mintel (2016)

Australian Innovative Capsicum Launches:
L3M (June – September 2016)

Food Love Kitchen Pesto Ripple

McCain Healthy Choice Protein Plus Chicken Satay



Weight Watchers Gourmet Menu Mango Coconut Chicken

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

Dr. Oetker Papa Giuseppi's Bakehouse Crust Supreme Pizza

Herbert Adams Gourmet Slow-Cooked 6 Hours Smoky Pulled Pork Pies

Lean Cuisine Pots of Goodness Mexican Chicken Chipotle

Yumi's Deli Range Roasted Red Capsicum Pesto

Source: Mintel (2016)

Brussels Sprouts.

Both average purchase and consumption frequency have slightly increased this wave. Coles and Woolworths remain the key locations for purchase. There is a trend towards increased purchase from Aldi across the last three waves.

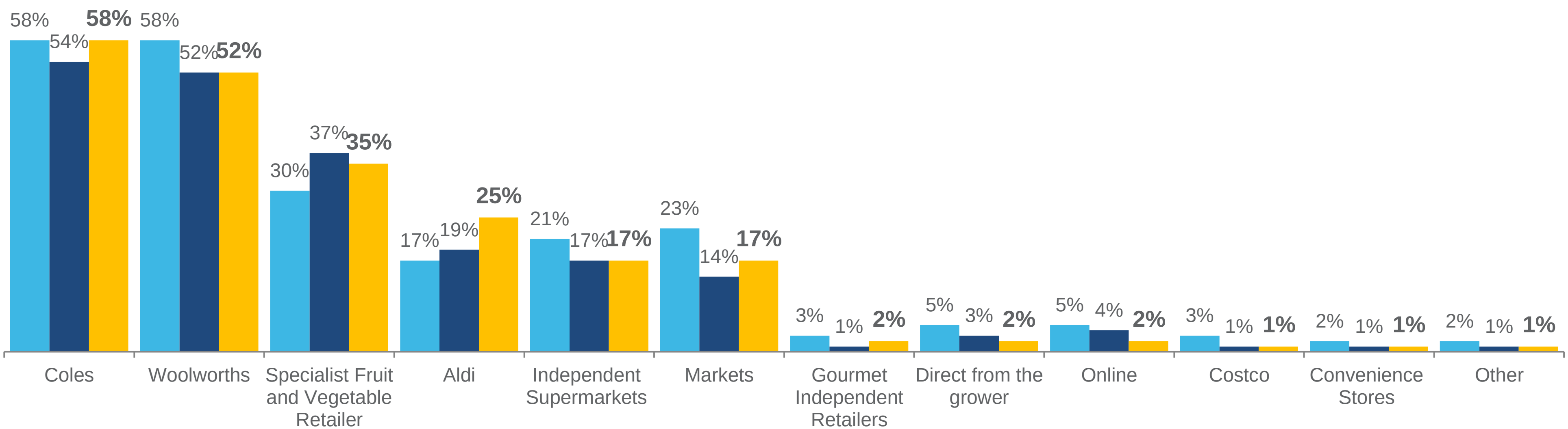
Average Purchase **3.3** times per month

▲ 3.4 times, Wave 32
▼ 3.1 times, Wave 36

Average Consumption **6.5** times per month

▼ 5.9 times, Wave 32
▼ 6.4 times, Wave 36

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 32 N=231, Wave 36 N=302, Wave 40 N=302

Horticulture Innovation Australia

colmar brunton.

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

Average Spend and Price Sensitivity

Average weight of purchase

The average consumer typically purchased **0.6kg** of Brussels sprouts in September 2016, consistent with the previous wave.

▲ 0.7kg, Wave 32
— 0.6kg, Wave 36

Recalled last spend

The average recalled last spend was **$4.10**, which has returned to levels seen in Wave 32.

— $4.10, Wave 32
▼ $3.60, Wave 36

Value for money

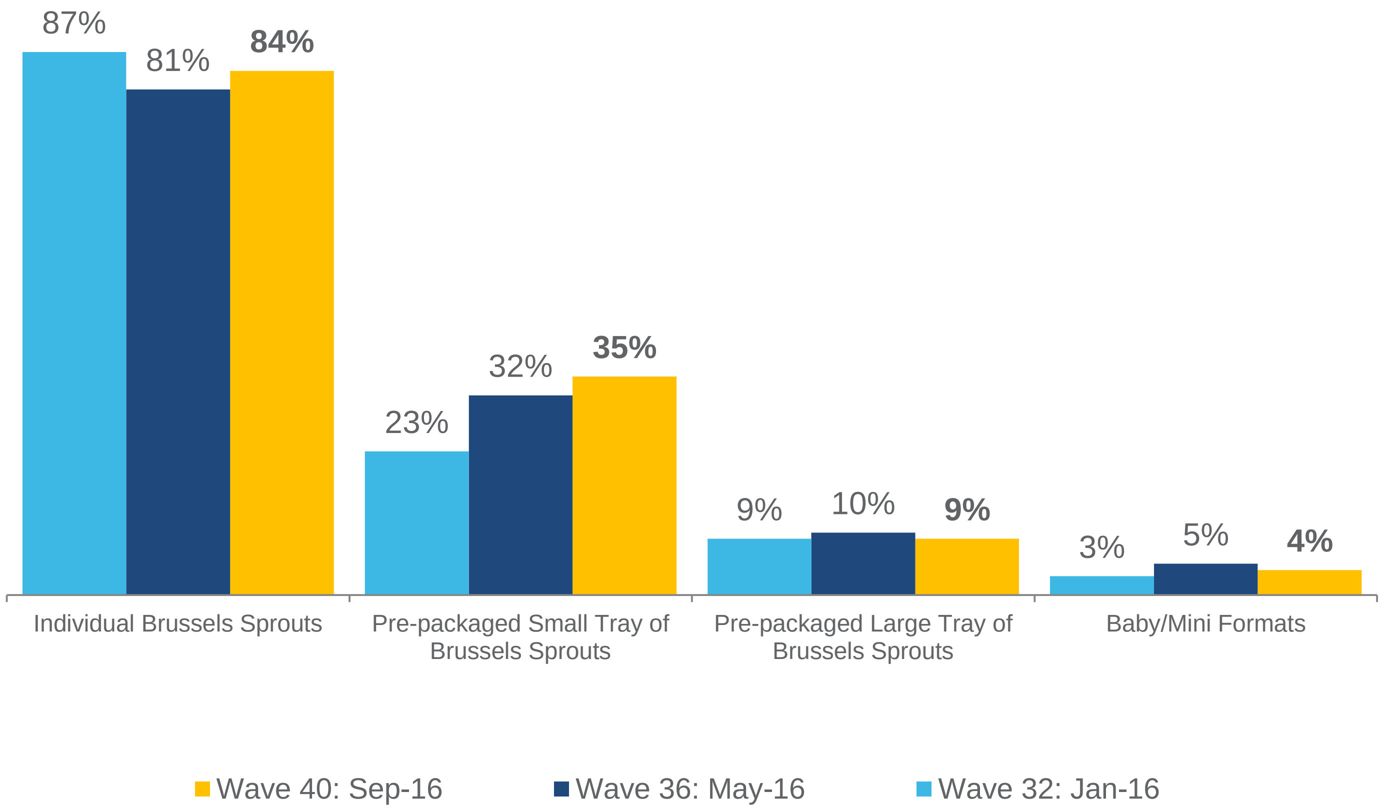
On average, consumers perceived Brussels sprouts to be good value for money **(6.5/10)**, relatively consistent with the previous wave.

▼ 6.1/10, Wave 32
▲ 6.6/10, Wave 36

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 32 N=231, Wave 36 N=302, Wave 40 N=302

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

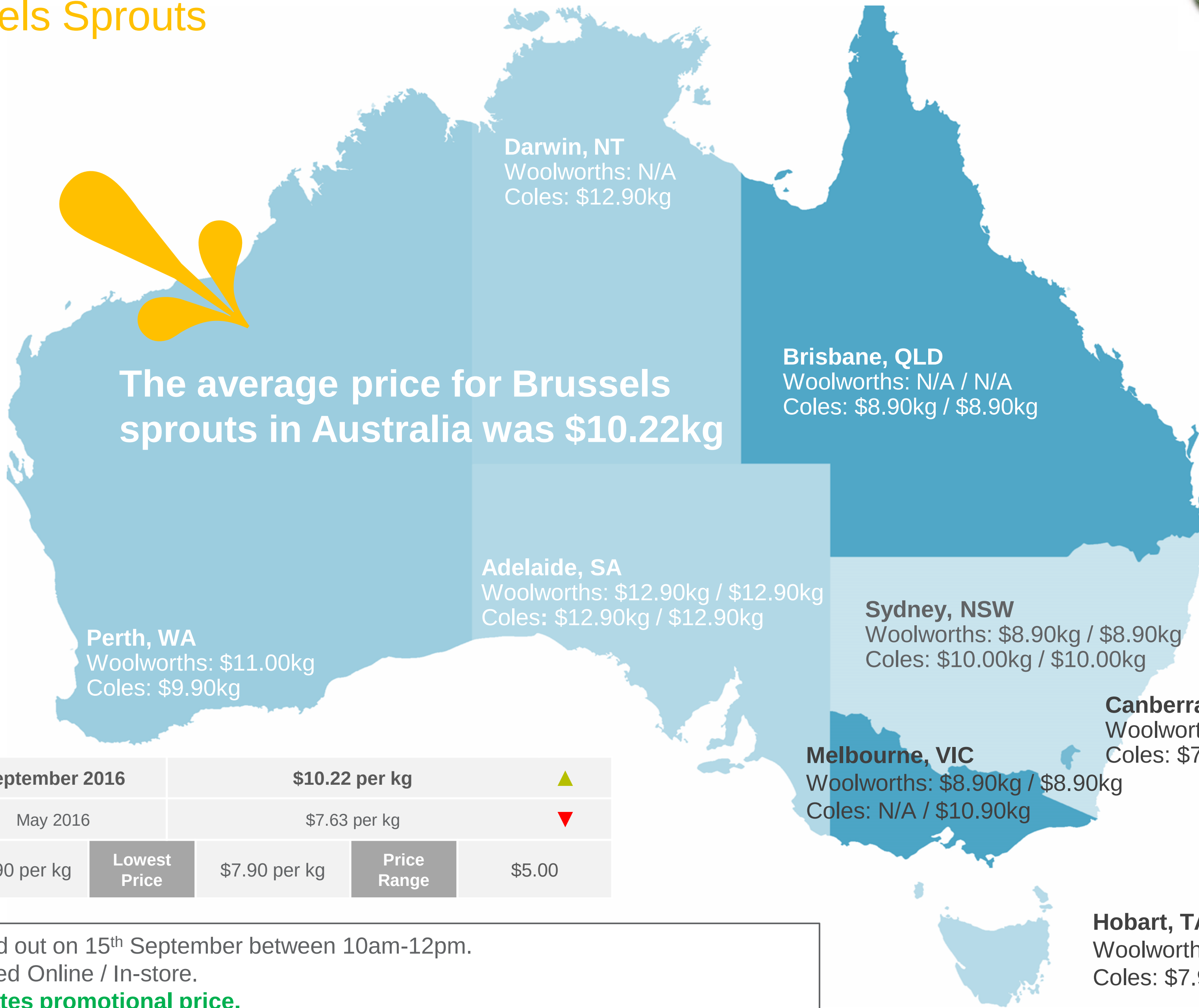
Individual Brussels sprouts were the main format purchased, consistent with previous waves. There has been an increasing trend in purchase of pre-packaged small bags of Brussels sprouts.



Q4b. In what fresh formats do you typically purchase Brussels Sprouts?
Sample Wave 32 N=231, Wave 36 N=302, Wave 40 N=302

Online and In-store Commodity Prices

Brussels Sprouts



Average Price	**September 2016**		**$10.22 per kg** ▲		
	May 2016		$7.63 per kg ▼		
Highest Price	$12.90 per kg	**Lowest Price**	$7.90 per kg	**Price Range**	$5.00

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

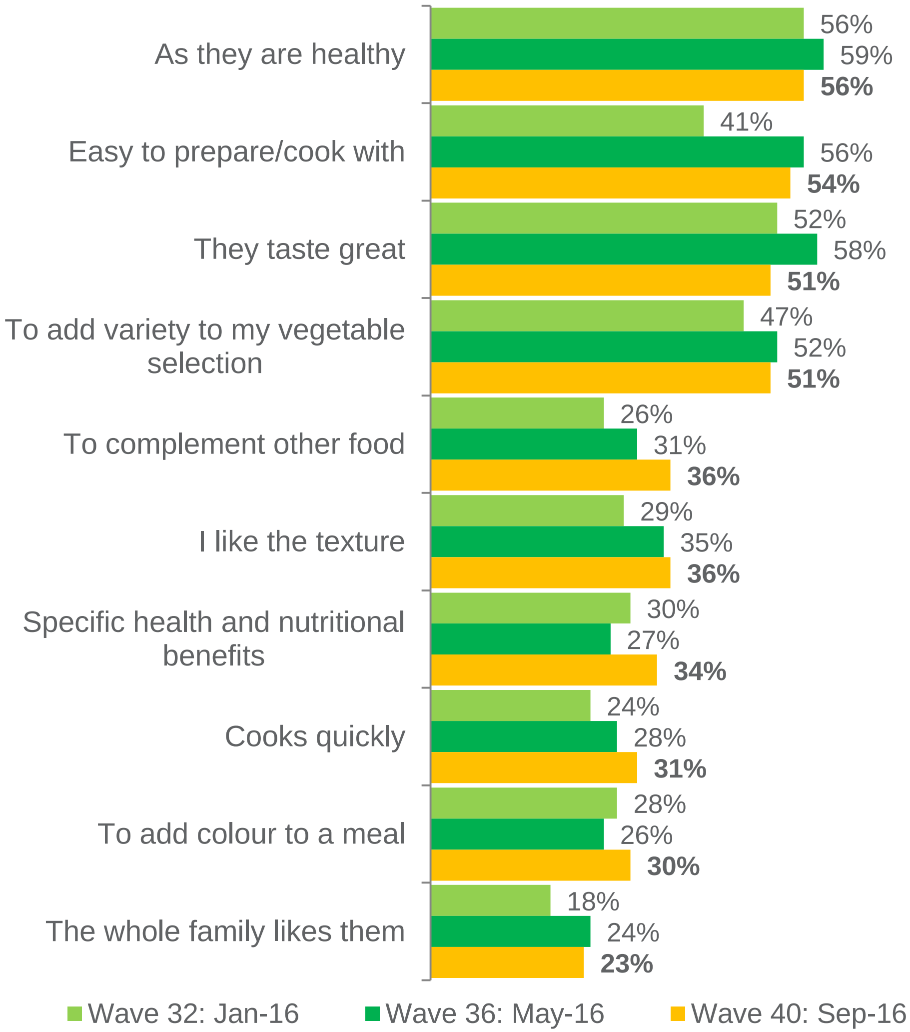
79% of consumers could not recall any type of Brussels sprouts.

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

Q6a. What varieties of <commodity> are you aware of? (unprompted)
Sample Wave 32 N=231, Wave 36 N=302, Wave 40 N=302

The main triggers for purchase are based around health and ease of preparation. In contrast, the barriers to purchase for consumers are already consuming enough to balance their diet and wanting a variety of vegetables. There has been an increasing trend in complementing other food, texture and cooks quickly as triggers to purchase.

Triggers



Barriers

Q7. Which of the following reasons best describes why you purchase <commodity> ?
Q8. Which reason best describes why you don't buy <commodity> more often?
Sample Wave 32 N=231, Wave 36 N=302, Wave 40 N=302

Dinner was the main consumption occasion for Brussels sprouts.

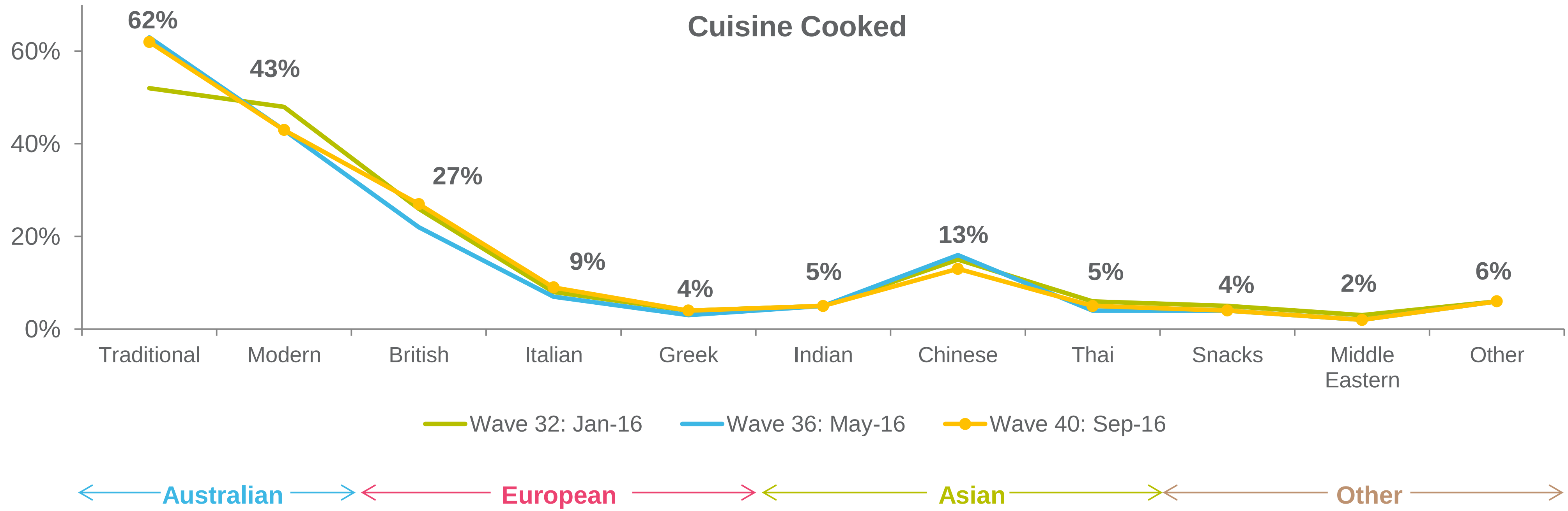
Traditional Australian cuisine was the most common cooking style. Cuisine choice has remained consistent across previous waves.

Top 5 Consumption Occasions

	Wave 36	Wave 40
Dinner	73%	**72%**
Family meals	50%	**60%**
Weekday meals	46%	**48%**
Weekend meals	38%	**39%**
Quick Meals	21%	**24%**

9% used Brussels Sprouts when cooking a new recipe

▲ 11%, Wave 36



Q10. What cuisines do you cook/consume that use <commodity> ?
Q11. Which of the following occasions do you typically consume/use <commodity> ?
Sample Wave 32 N=231, Wave 36 N=302, Wave 40 N=302

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

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

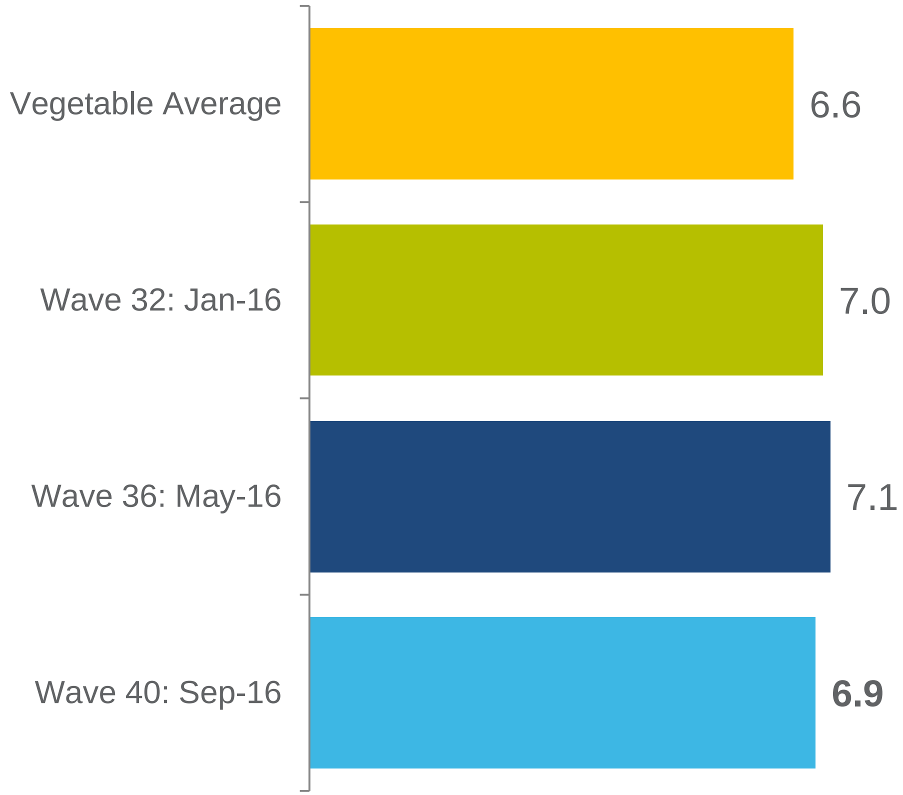
Accompanying Vegetables

Potato	62%
Carrot	59%
Sweet Potato	35%
Pumpkin	31%
Onion	27%

Top 10 Cooking Styles			
	Wave 32	Wave 36	Wave 40
Steaming	58%	55%	**61%**
Boiling	42%	40%	**38%**
Stir frying	21%	24%	**25%**
Microwave	19%	20%	**19%**
Sautéing	16%	16%	**18%**
Frying	13%	14%	**14%**
Roasting	15%	12%	**12%**
Slow Cooking	10%	10%	**8%**
Soup	9%	9%	**8%**
Baking	10%	7%	**7%**

Q9. How do you typically cook <commodity> ?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
Sample Wave 32 N=231, Wave 36 N=302, Wave 40 N=302

Importance of provenance has slightly declined this wave. However, consumers still find it very important to know that Brussels sprouts are grown in Australia.



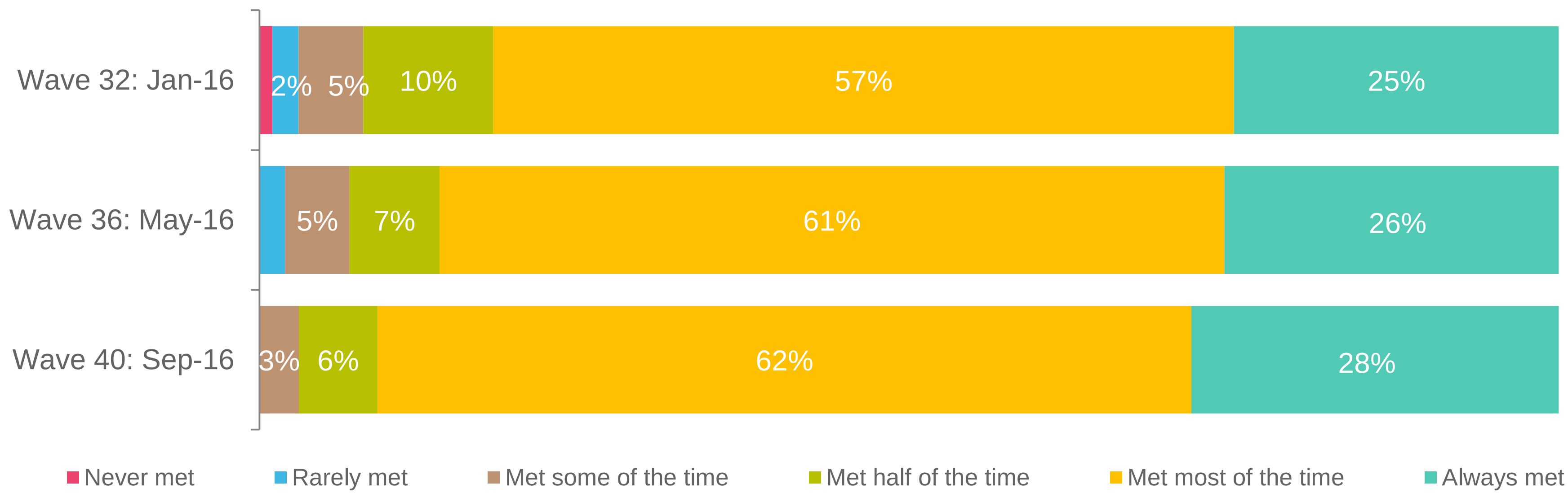
Q14. When purchasing <commodity>, how important is Provenance to you?
Mean scores out of 10.
Sample Wave 32 N=231, Wave 36 N=302, Wave 40 N=302

Consumers expect Brussels sprouts to stay fresh for nine days once purchased, with these expectations increasingly being met more often.

Expected to stay fresh for **9.1** days

▼ 8.8 days, Wave 32
▲ 9.2 days, Wave 36

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 32 N=231, Wave 36 N=302, Wave 40 N=302

Horticulture Innovation Australia

colmar brunton.

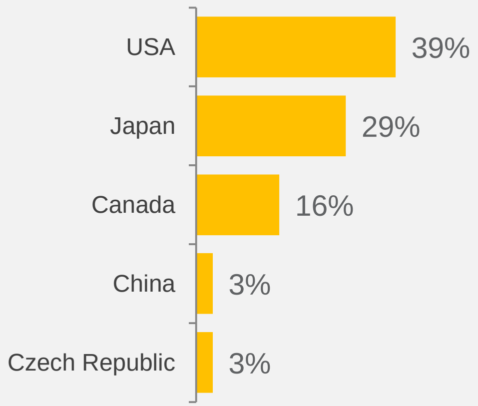
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Trends:
Brussels Sprouts

Brussels Sprouts Global Launches
June – September 2016

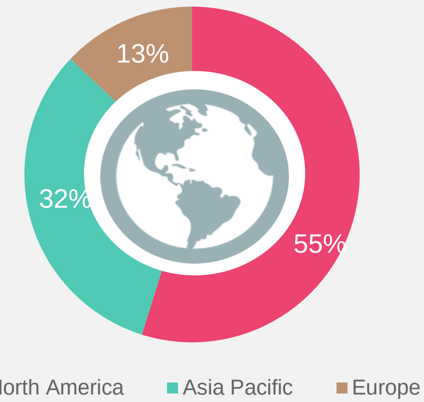
There were 31 Brussels sprouts products launched globally over the last three months. The majority of launches were in USA and Japan Categories for launches were juice drinks and meals. Key packaging for Brussels sprouts products were flexible packaging and cartons.

Country

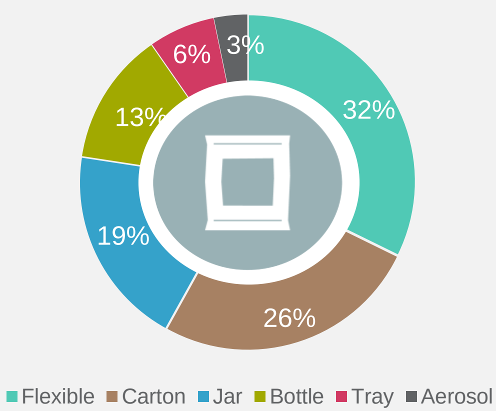


31 Global NPDs

Region



Top Pack Formats



Categories

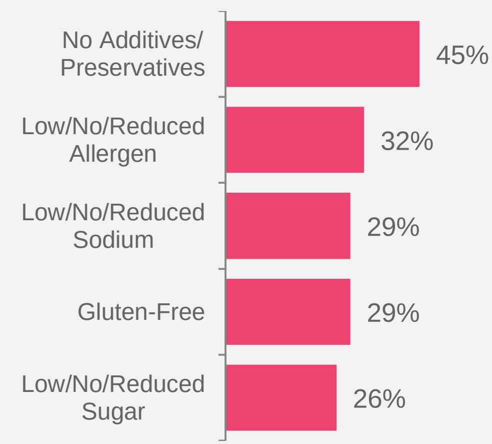
Juice Drinks 29%

Meals 23%

Healthcare 19%

Fruit & Vegetables 13%

Top Claims

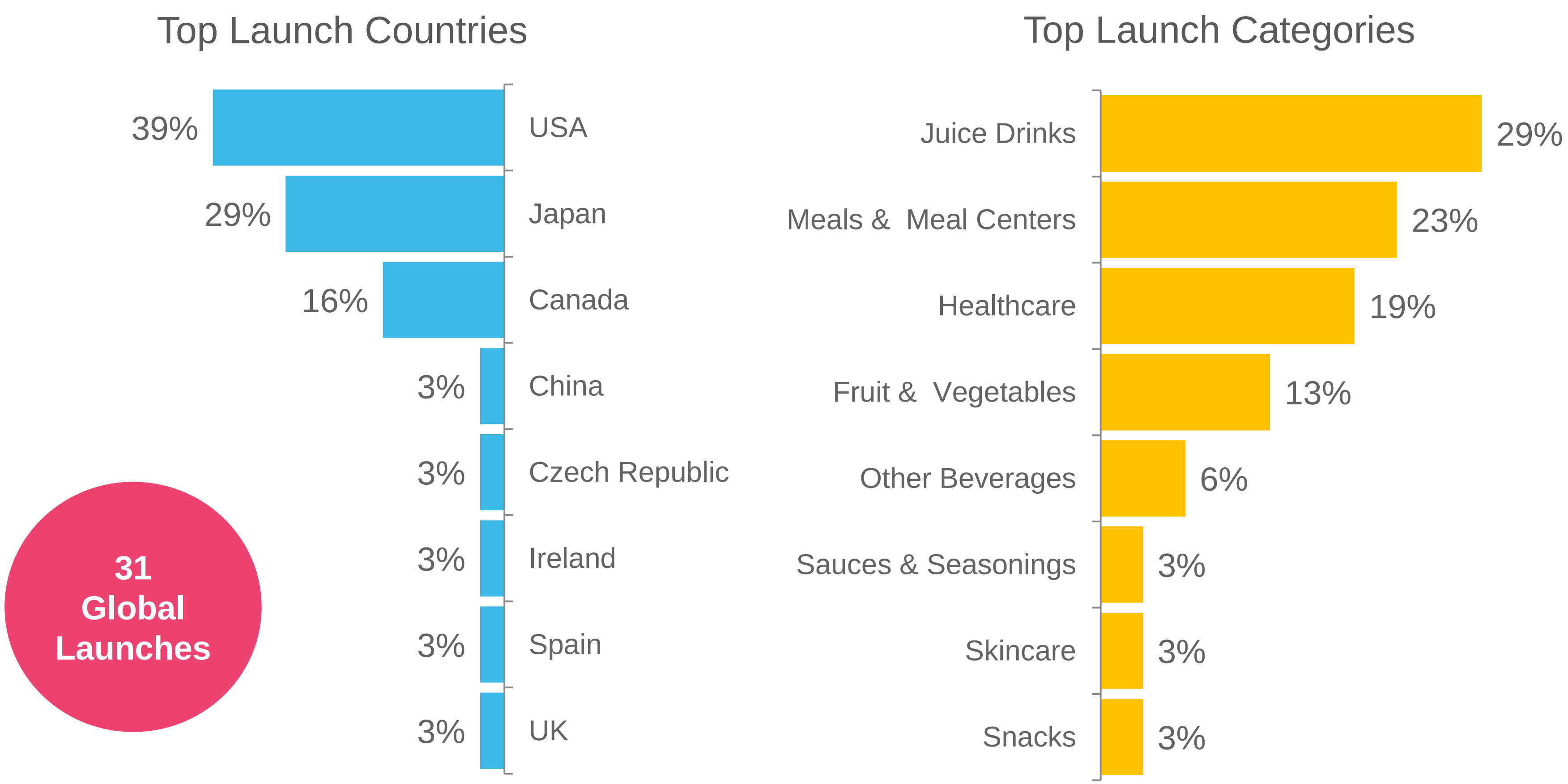


Brussels Sprouts Product Launches:
Last 3 Months (June – September 2016)
Summary

- There were 31 launches in the past 3 months globally that contained Brussels sprouts as an ingredient.
- There were no products launched in Australia over the past three months.
- North America (55%) and Asia Pacific (32%) were the key regions for launches.
- Flexible packaging (32%) and cartons (26%) were the most common formats utilised.
- The main categories for launches were juice drinks (29%), meals (23%), healthcare (19%) and fruits & vegetables (13%).
- Most popular claims on products included no additives/preservatives (45%) and low/no/reduced allergen (32%).
- The most innovative product launched was a Teriyaki Stir Fry Kit from USA. Examples of these can be found in the following pages.

Source: Mintel (2016)

The majority of Brussels sprouts launches occurred in USA and Japan. The key categories for Brussels sprouts launches are juice drinks, meals, healthcare, and fruits & vegetables.



The main claim globally was no additives & preservatives, low/no/reduced allergen and low/no/reduced sodium.

Flexible packaging and cartons are primarily used for Brussels sprouts products.

Pack Formats Used

	Pack Format	%
Global	Flexible	32%
	Carton	26%
	Jar	19%

Top Claims Used

	Claim	%
Global	No Additives/Preservatives	45%
	Low/No/Reduced Allergen	32%
	Low/No/Reduced Sodium	29%

Only regions with n >30 are displayed

Innovative Brussels Sprouts Launches:

L3M (June – September 2016)

Taylor Farms Teriyaki Stir Fry Kit (USA)

Taylor Farms Teriyaki Stir Fry Kit comprises broccoli, Brussels sprouts, carrots, kale, red cabbage, snow peas and teriyaki sauce. It is washed and ready to enjoy and includes cashews and chow mein noodles. The product retails in a pack containing 13.8-oz. vegetables and toppings and 3.6-fl. oz. sauce, bearing a QR code.

Claims:
Ease of Use

Birds Eye Steamfresh Flavor Full Sea Salt & Cracked Pepper Brussel Sprouts (USA)

Birds Eye Steamfresh Flavor Full Sea Salt & Cracked Pepper Brussel Sprouts perfectly cook in the bag in the microwave. The product retails in a 10-oz. bag.

Claims:
Microwaveable

Progressive VegeGreens Protein & Veggies Protein Bar (Canada)

Progressive VegeGreens Protein & Veggies Protein Bar is said to be a quick and convenient high protein snack, containing a blend of New Zealand dairy protein isolates, as well as over 1500mg of the vegetable concentrate blend found in the original VegeGreens formula. The product is naturally flavoured and sweetened, contains 15g of protein per bar, and retails in a 45g pack.

Claims:
High Protein, Time/Speed, Ease of Use

Mann's Nourish Bowls Smokehouse Brussels (USA)

Mann's Nourish Bowls Smokehouse Brussels are described as a delicious warm meal with fresh veggies, rice and sauce. The product contains 420 calories per bowl and comprises Brussels sprouts, kohlrabi, kale and brown rice with smoky sweet glaze. It can be prepared in three minutes in the microwave and retails in a microwave ready bowl containing 7.25-oz. veggies and rice and 1.75-fl. oz. sauce.

Claims:
Microwaveable, Ease of Use

Source: Mintel (2016)

Spinach.

On average, spinach is purchased five times per month, and is consumed ten times per month, both increasing this wave.

Spinach is predominantly purchased through mainstream retailers, with an increasing trend in purchase from Aldi.

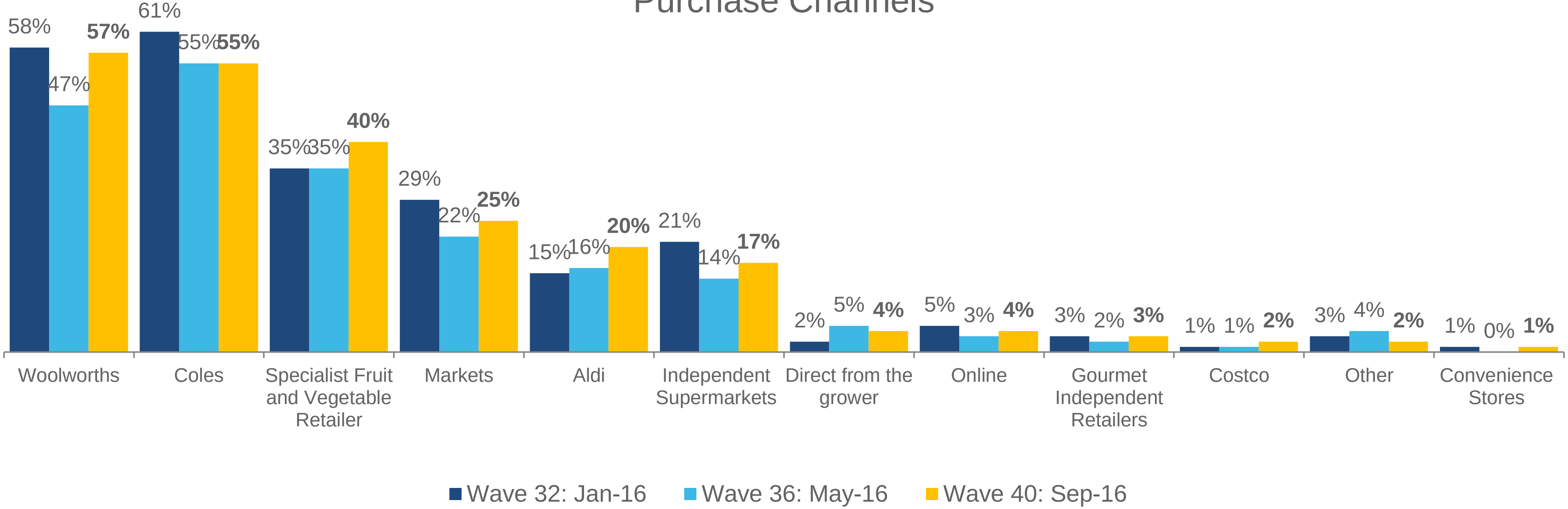
Average Purchase **4.7** times per month

▼ 4.6 times, Wave 32
▼ 4.3 times, Wave 36

Average Consumption **10.0** times per month

▲ 11.1 times, Wave 32
▼ 9.5 times, Wave 36

Purchase Channels



Q1. On average, how often do you purchase Spinach (English and baby)?
Q2. On average, how often do you consume Spinach (English and baby)?
Q5. From which of the following channels do you typically purchase Spinach (English and baby)?
Sample Wave 32 N=305, Wave 36 N=300, Wave 40 N=303

Horticulture Innovation Australia

colmar brunton.

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

Average Spend and Price Sensitivity

Average weight of purchase

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

– 0.5kg, Wave 32
– 0.5kg, Wave 36

Recalled last spend

Recalled last spend on spinach is **$3.90**, which has increased this wave.

▼ $3.60, Wave 32
▼ $3.40, Wave 36

Value for money

Consumers perceive spinach to be good value for money **(6.6/10)**, which is slightly lower than the previous wave.

▼ 6.2/10, Wave 32
▲ 6.8/10, Wave 36

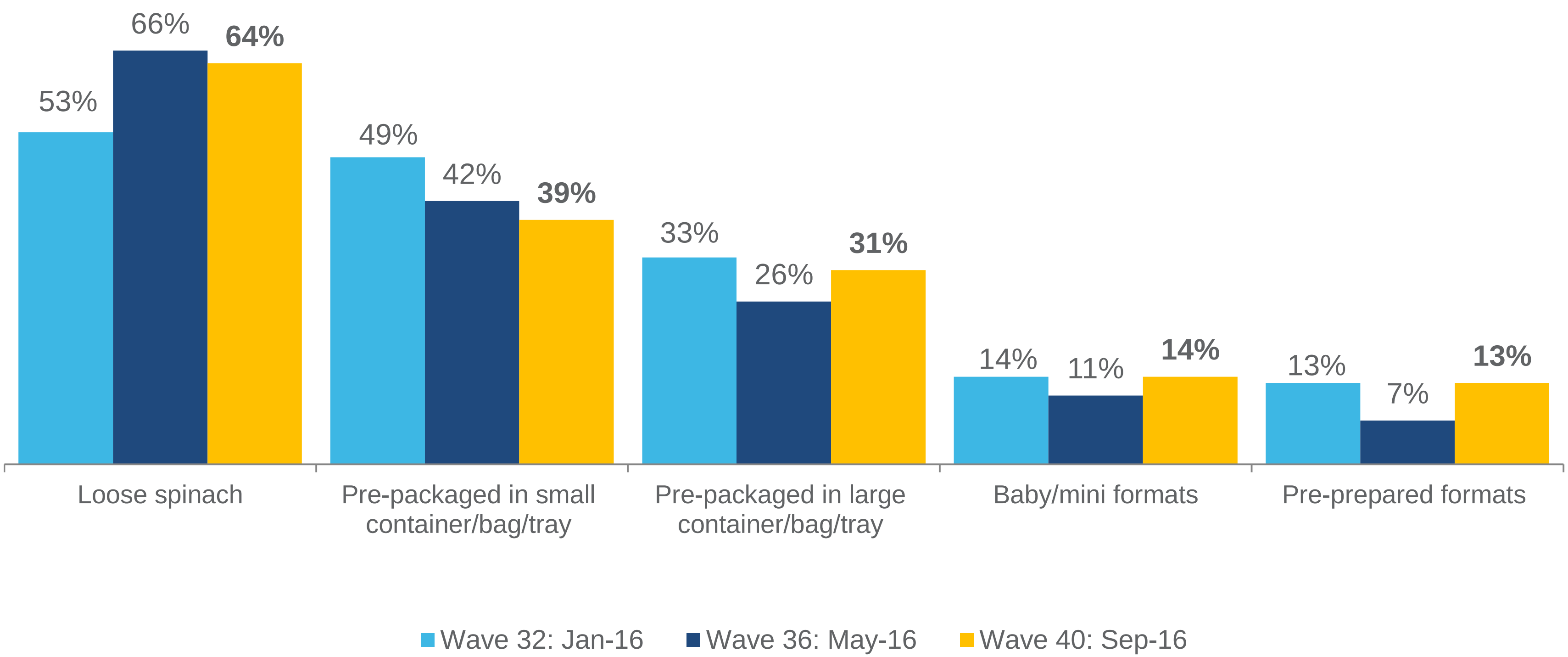
Q3. How much Spinach do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 32 N=305, Wave 36 N=300, Wave 40 N=303

Horticulture Innovation Australia

colmar brunton.

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

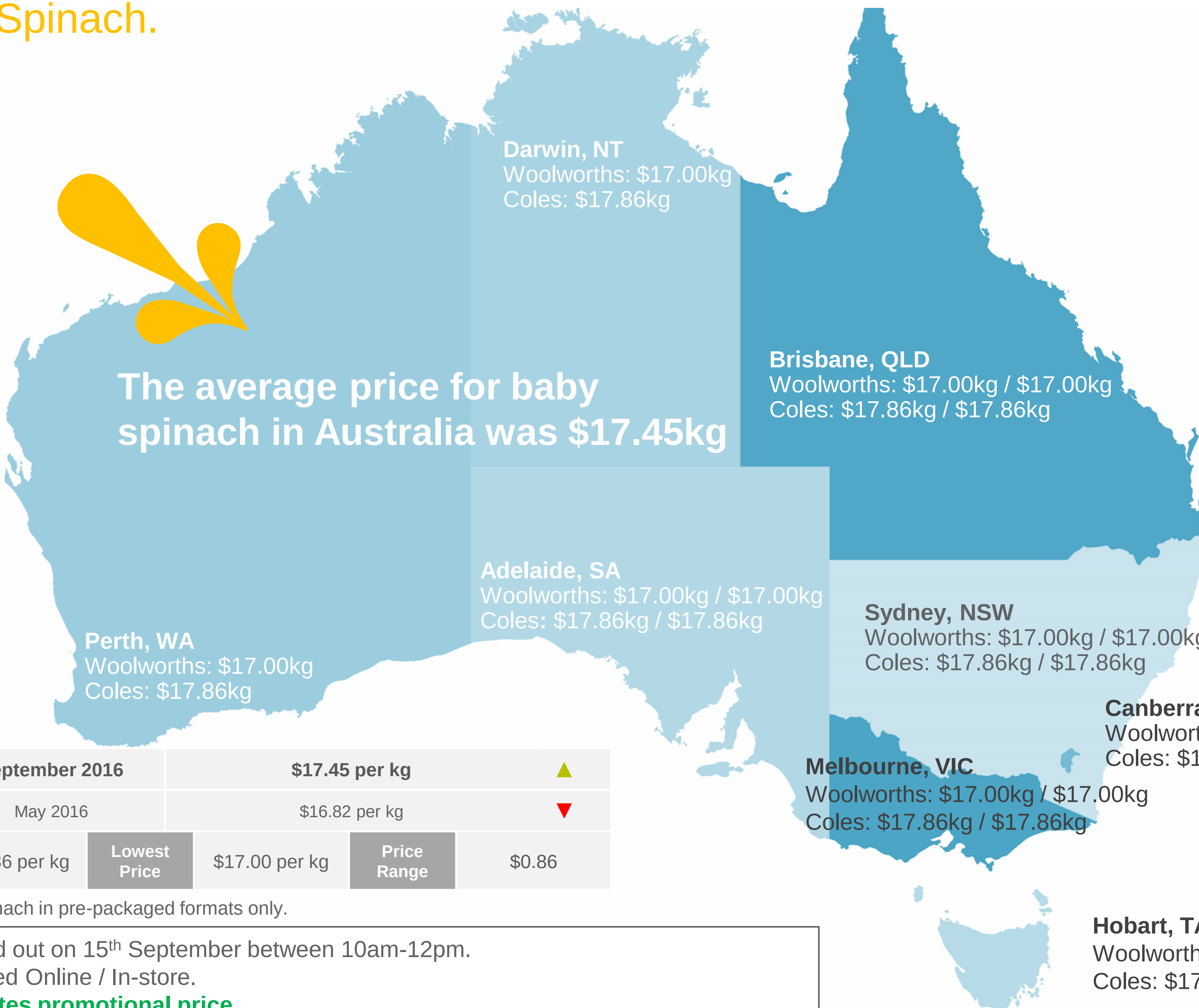
Loose spinach and pre-packaged small bags are the most common purchase formats, consistent with the previous waves.



Q4b. In what fresh formats do you typically purchase Spinach (English and baby)?
Sample Wave 32 N=305, Wave 36 N=300, Wave 40 N=303

Online and In-store Commodity Prices

Baby Spinach.



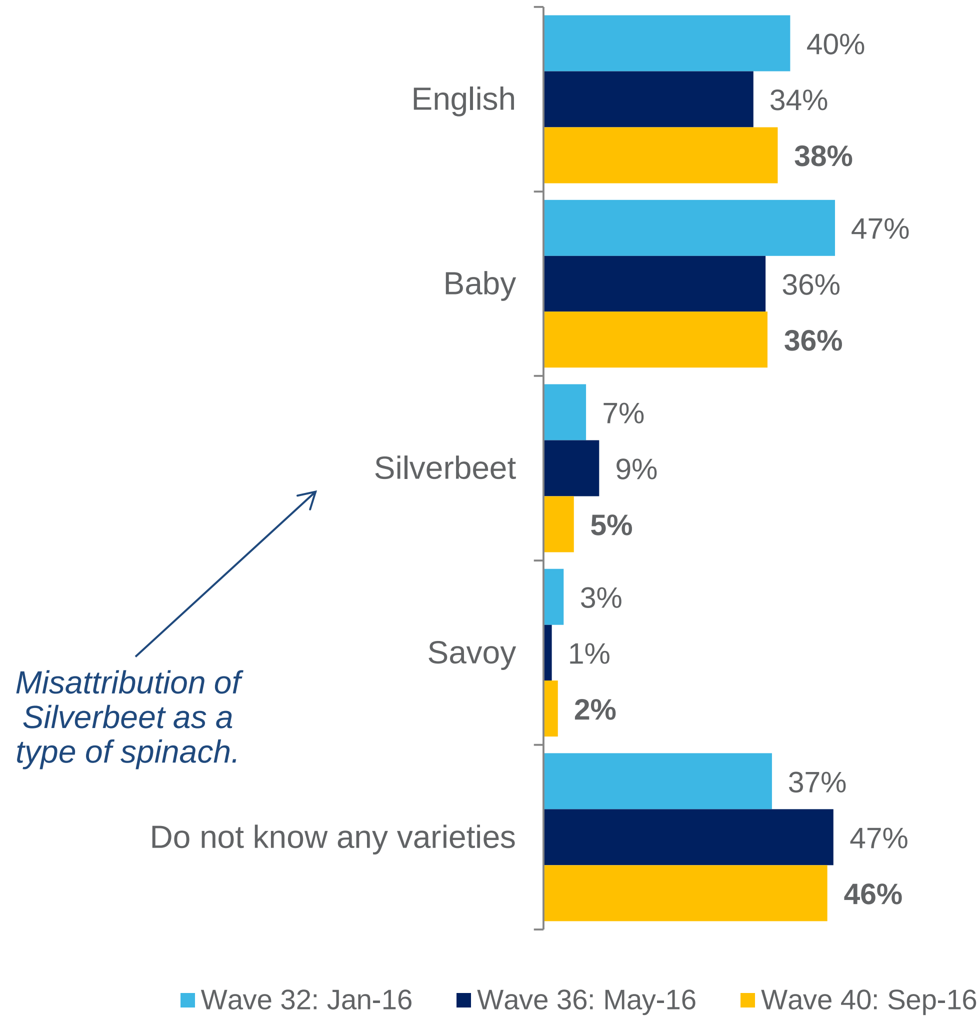
Average Price	**September 2016**	**$17.45 per kg**	▲		
	May 2016	$16.82 per kg	▼		
Highest Price	$17.86 per kg	**Lowest Price**	$17.00 per kg	**Price Range**	$0.86

Coles sold baby spinach in pre-packaged formats only.

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

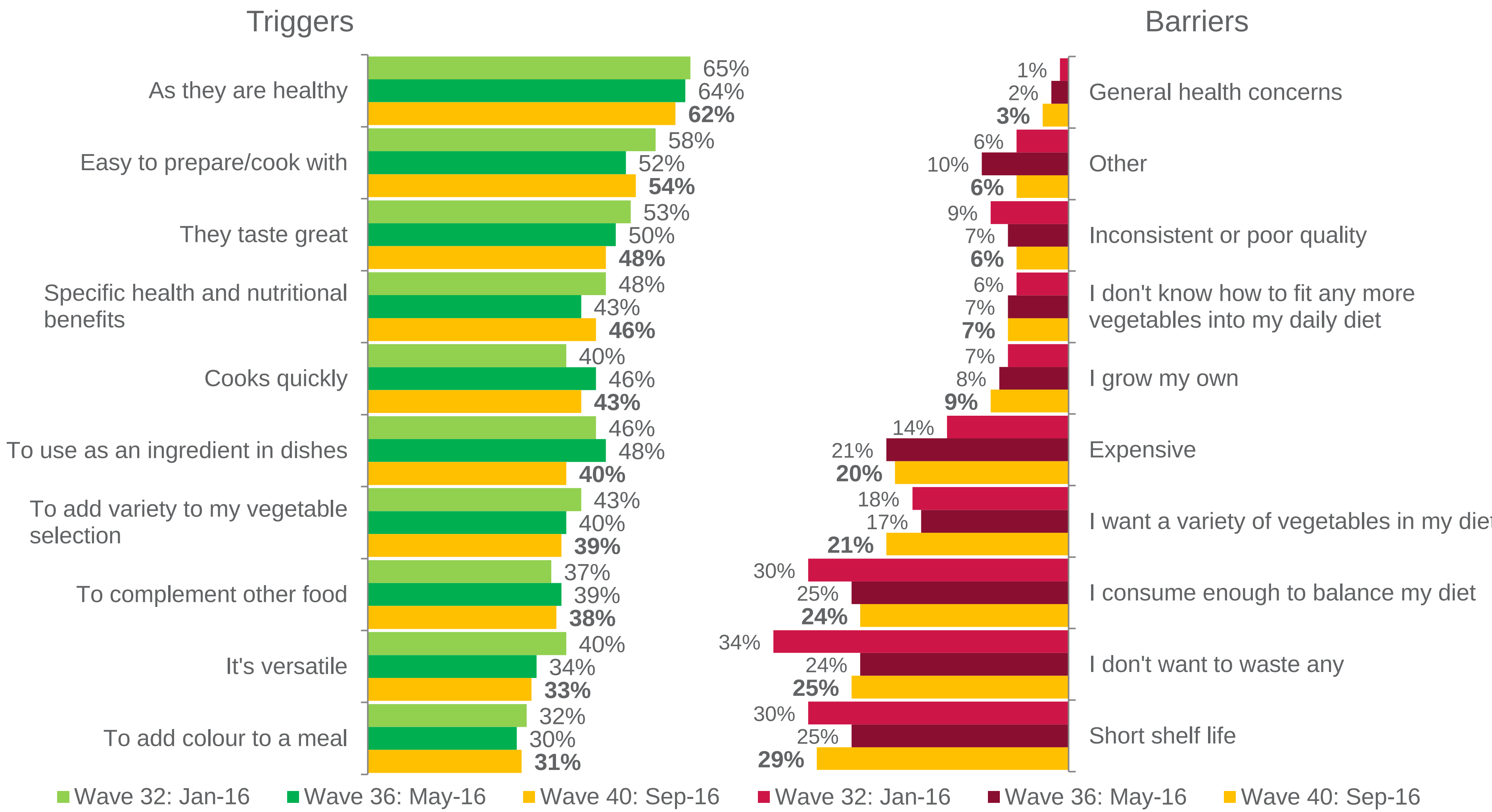
Nearly half of consumers could not recall a type of spinach this wave.

English and baby were the most commonly recalled types.



Q6a. What varieties of Spinach are you aware of? (unprompted)
Sample Wave 32 N=305, Wave 36 N=300, Wave 40 N=303

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



Q7. Which of the following reasons best describes why you purchase Spinach (English and baby)?
Q8. Which reason best describes why you don't buy Spinach (English and baby) more often?
Sample Wave 32 N=305, Wave 36 N=300, Wave 40 N=303

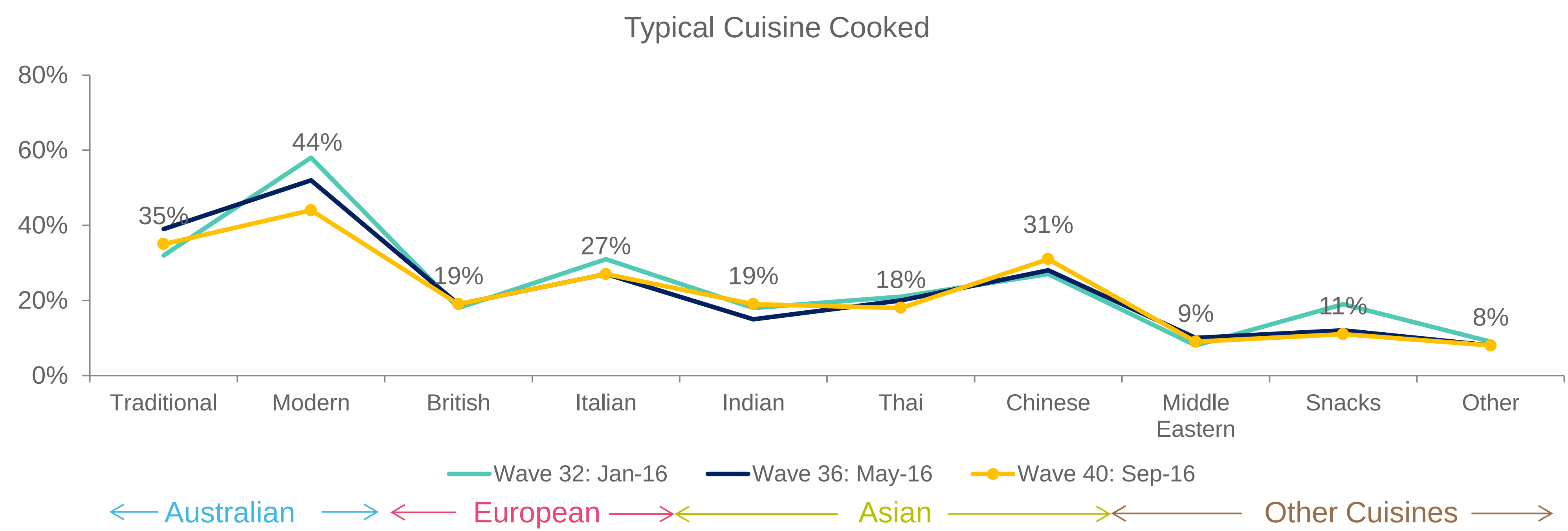
Australian, Chinese and Italian cuisines are popular for spinach dishes. Consistent with the past wave, meal occasions tend to occur during dinner.

Top 5 Consumption Occasions

	Wave 36	Wave 40
Dinner	66%	**66%**
Family meals	51%	**53%**
Weekday meals	45%	**48%**
Lunch	44%	**44%**
Quick Meals	40%	**43%**

17% used spinach when cooking a new recipe

17%, Wave 36



Q10. What cuisines do you cook/consume that use Spinach (English and baby)?
Q11. Which of the following occasions do you typically consume/use Spinach (English and baby)?
Sample Wave 32 N=305, Wave 36 N=300, Wave 40 N=303

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

Consumers prefer to use spinach mainly with tomatoes, onions and carrots. Spinach is generally eaten raw or stir fried. There has been a consistent increase in soups and boiling as cooking styles over the last three waves.

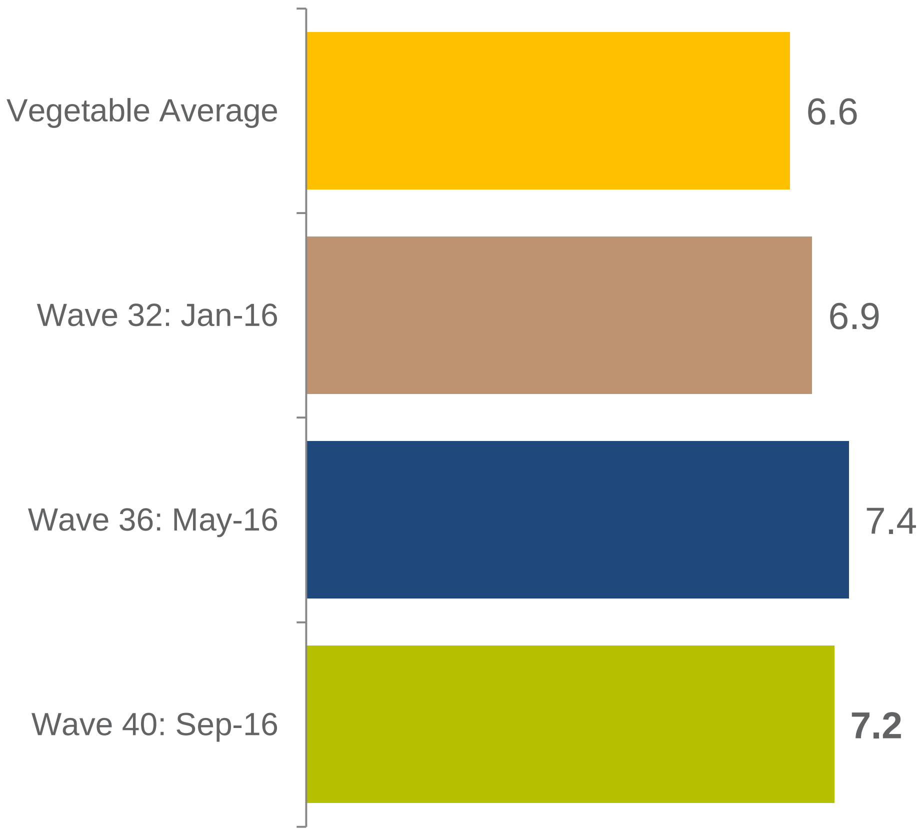
Accompanying Vegetables

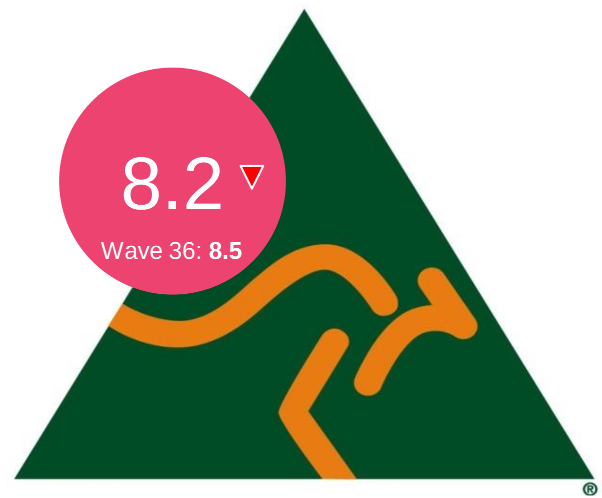
Tomato	42%
Onion	40%
Carrot	38%
Capsicum	33%
Potatoes	33%

Top 10 Cooking Styles			
	Wave 32	Wave 36	Wave 40
Raw	57%	41%	**51%**
Stir frying	51%	47%	**48%**
Steaming	36%	40%	**37%**
Sautéing	27%	27%	**29%**
Soup	16%	19%	**21%**
Boiling	16%	18%	**20%**
Baking	12%	7%	**13%**
Frying	12%	13%	**12%**
Slow Cooking	8%	10%	**10%**
Microwave	7%	9%	**8%**

Q9. How do you typically cook Spinach (English and baby)?
Q10a. And when are you serving Spinach (English and baby) which of the following do you also serve together with this?
Sample Wave 32 N=305, Wave 36 N=300, Wave 40 N=303

Importance of provenance has slightly declined this wave. Knowing that spinach is grown in Australia still remains highly important provenance information for consumers.





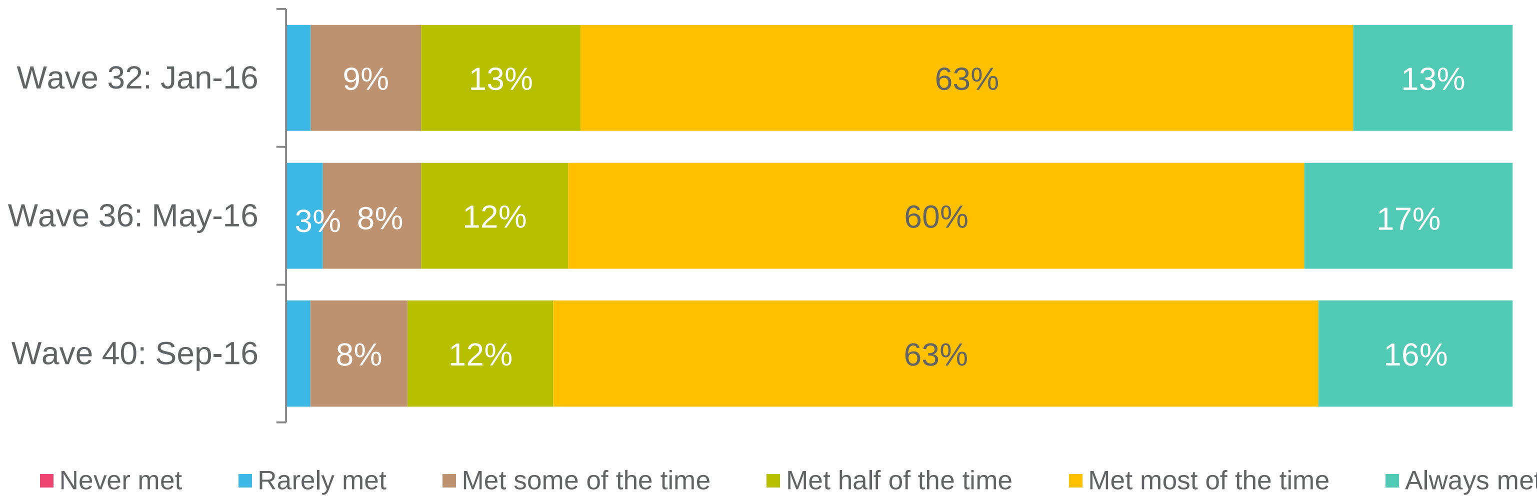
Q14. When purchasing Spinach (English and baby), how important is Provenance to you?
Q15. And when purchasing Spinach (English and baby), how important is that it is grown in Australia?
Sample Wave 32 N=305, Wave 36 N=300, Wave 40 N=303

Consumers expect spinach to remain fresh for just under a week once purchased. Freshness expectations have remained relatively consistent with the previous wave.

Expected to stay fresh for **6.1** days

▼ 6.0 times, Wave 32
▲ 6.4 times, Wave 36

Expectations Met



Q12. How long do you expect Spinach (English and baby) to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy Spinach (English and baby)?
Sample Wave 32 N=305, Wave 36 N=300, Wave 40 N=303

Horticulture Innovation Australia

colmar brunton.

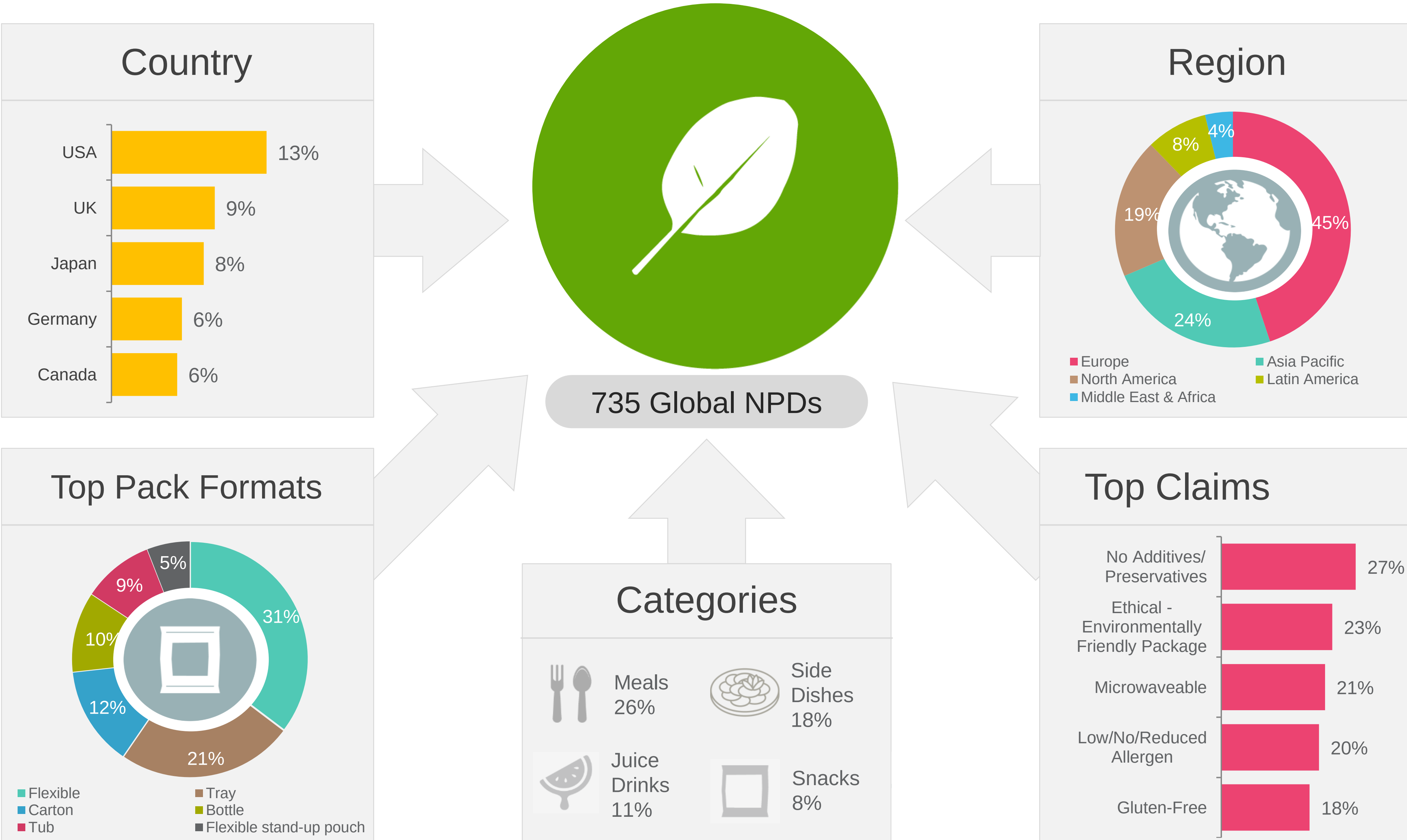
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Spinach Product Launch Trends.

Spinach Global Launches

June – September 2016

There were 735 spinach products launched globally over the last three months. The majority of launches were in USA and the UK. Categories for launches were meals and side dishes. Key packaging for spinach products were flexible packaging and trays.

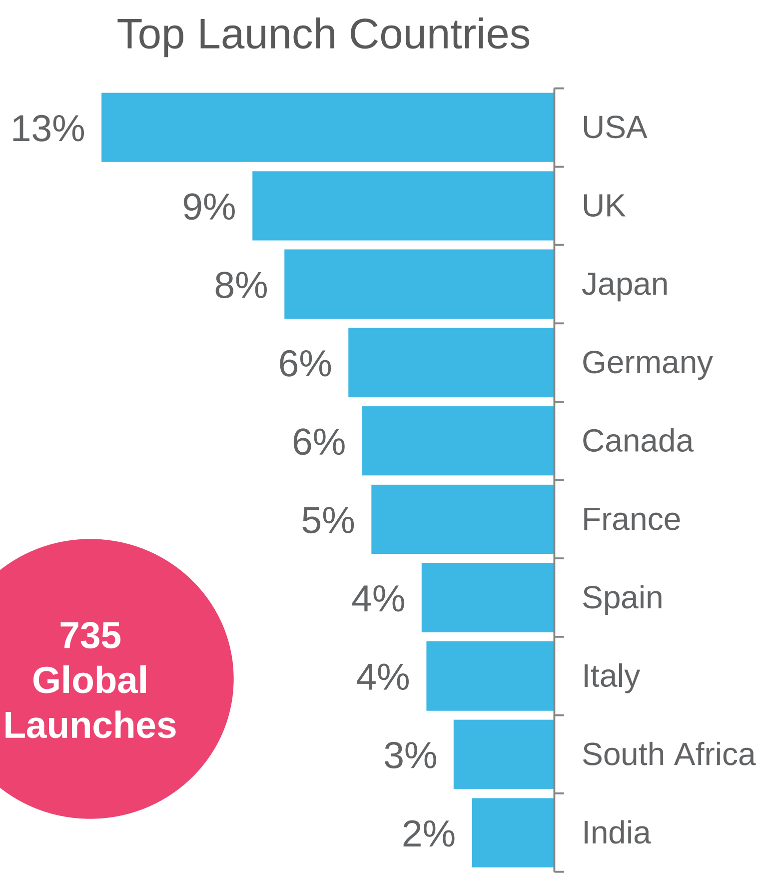


Spinach Product Launches:
Last 3 Months (June – September 2016)
Summary

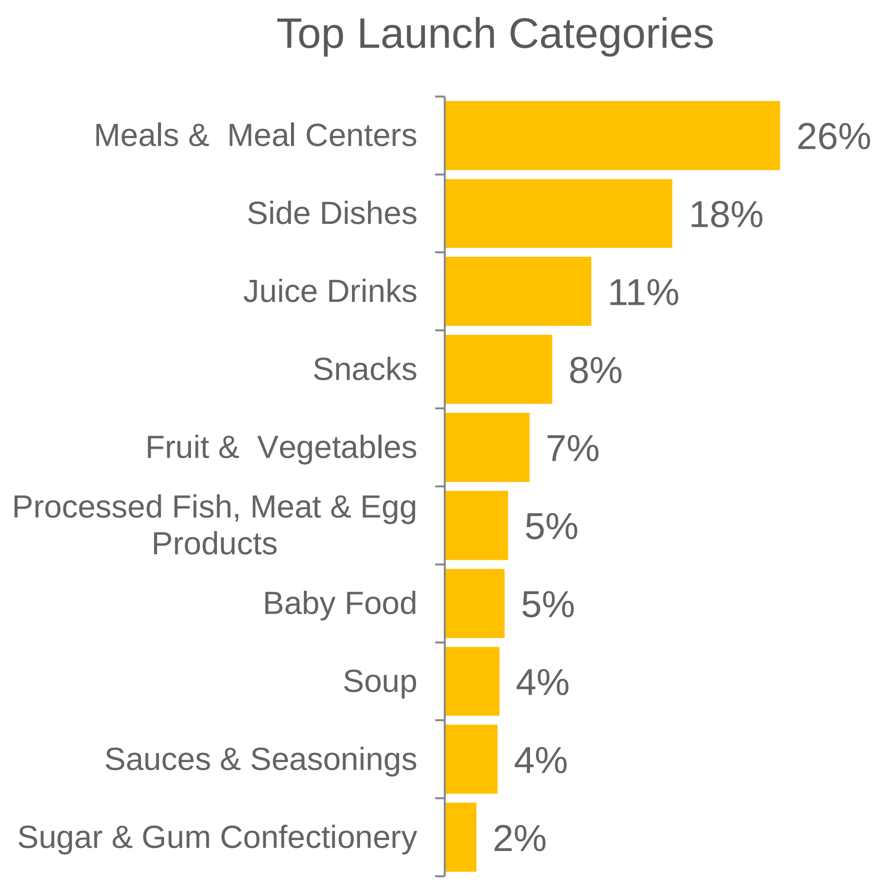
- There were 735 launches in the past 3 months globally that contained spinach as an ingredient.
- There were 16 products launched in Australia over the past three months.
- Europe (45%) and North America (24%) were the key regions for launches.
- Flexible packaging (31%) and trays (21%) were the most common formats utilised.
- The main categories for launches were meals (26%), side dishes (18%), juice, snacks (11%) and snacks (8%).
- Most popular claims on products included no additives/preservatives (27%) and ethical & environmentally friendly packaging (23%).
- The most innovative product launched was Soy and Spinach Burgers from Italy. Examples of these can be found in the following pages.

Source: Mintel (2016)

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



735 Global Launches



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

Flexible packaging and trays are primarily used for spinach products.

Pack Formats Used

Region	Pack Format	%
Global	Flexible	31%
Global	Tray	21%
Global	Carton	12%
Europe	Tray	30%
Europe	Flexible	29%
Europe	Carton	13%
North America	Flexible	30%
North America	Carton	16%
North America	Tray	14%

Top Claims Used

Region	Claim	%
Global	No Additives/Preservatives	27%
Global	Ethical - Environmentally Friendly Package	23%
Global	Microwaveable	21%
Europe	Ethical - Environmentally Friendly Package	25%
Europe	Microwaveable	25%
Europe	Vegetarian	21%
North America	No Additives/Preservatives	38%
North America	Microwaveable	23%
North America	Low/No/Reduced Sugar	22%

Only regions with n >30 are displayed

Innovative Spinach Launches:
L3M (June – September 2016)

Carte D'Or Les Authentiques Pistachio Ice Cream (France)

Carte D'Or Les Authentiques Pistache (Pistachio Ice Cream) has been repackaged and is now available in a 1300ml special format pack featuring a link to the manufacturer's Facebook page. The product is made with fresh cream from Normandy and contains no colouring or artificial flavourings.

Claims:
No Additives/Preservatives, Social Media

PnP ...to Complete Roasted Butternut & Creamed Spinach (South Africa)

PnP ...to Complete Roasted Butternut & Creamed Spinach is now available. It contains slow roasted butternut dusted with cinnamon sugar and tender spinach in a creamy sauce. The microwaveable heat-and-eat product retails in a 350g pack made from at least 80% recycled material.

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

Earthbound Farm Organic PowerMeal Spinach Quinoa Bowl with Red Balsamic Vinaigrette (USA)

Earthbound Farm Organic PowerMeal Spinach Quinoa Bowl with Red Balsamic Vinaigrette has been relaunched in a new packaging and with a new brand name, having been previously known under Earthbound Farm Power Meal Bowl brand. It comprises baby spinach, red and white quinoa, wild dried berries, and sunflower seeds, with 210 calories per pack.

Claims:
Organic, Social Media

Waitrose Spinach & Mint Potatoes (UK)

Waitrose Spinach & Mint Potatoes are baby potatoes coated in a spinach, herb and garlic dressing. They are ready to steam in the bag, can be microwave heated, and are suitable for vegetarians. This product is described as vibrant and fresh, and retails in a 360g pack.

Claims:
Microwaveable, Vegetarian, Ease of Use

Source: Mintel (2016)

Innovative Spinach Launches:
L3M (June – September 2016)

M Classic Spinach-Feta Strudel (Switzerland)

M Classic Spinat Feta-Strudel (Spinach-Feta Strudel) is new to the range. This product retails in a pack that contains 2 x 140g units and features the FSC logo.

Claims:
Ethical - Environmentally Friendly Package

BluePrint Organic Kale-A-Lu-Ya Kombucha Drink (USA)

BluePrint Organic Kale-A-Lu-Ya Kombucha Drink comprises handcrafted kombucha blended with organic cold-pressed kale, spinach and parsley juice. The kosher and USDA Organic certified drink contains 15% juice and is free of gluten. It is said to be an excellent source of antioxidant vitamin A and a highly intelligent way to get the greens. According to the manufacturer, kombucha is a fizzy, fermented black tea with added probiotic cultures and is claimed to aid digestion and support metabolism.

Claims:
Other (Functional), Kosher, Organic, Gluten-Free, Antioxidant, Digestive (Functional), Low/No/Reduced Allergen, Social Media

ICA Crik Crok Plus Veggie Potatoes, Spinach and Carrot Crisps (Italy)

ICA Crik Crok Plus Veggie Snack Salato di Patate, Spinaci e Carote (Potatoes, Spinach and Carrot Crisps) are now available. The product is suitable for vegans and free from gluten, and retails in a 100g pack.

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

Organics Happy Baby Kale & Spinach Organic Fruit & Grain Puffs (South Korea)

Organics Happy Baby Kale & Spinach Organic Fruit & Grain Puffs have been relaunched, previously known as Happy Puffs. This gluten-free, kosher product is made with whole grains, USDA-certified organic, and retails in a 60g pack.

Claims:
Kosher, Organic, Babies & Toddlers (0-4), Gluten-Free, Wholegrain, Low/No/Reduced Allergen

Source: Mintel (2016)

Innovative Spinach Launches:
L3M (June – September 2016)

Voelkel Für Organic Green Smoothie with Mango, Kale & Spinach (Germany)

Voelkel Für Grüner Smoothie Mango Grünkohl Spinat Bio (Organic Green Smoothie with Mango, Kale & Spinach) has been repackaged. The juice is an organic preparation of fruit, leaf vegetables and ginger juice. This pasteurised product retails in a 0.25L bottle which features the EU Green Leaf logo.

Claims:
Organic

Sonoma Flatbreads Organic Spinach & Feta Flatbread (USA)

Sonoma Flatbreads Organic Spinach & Feta Flatbread has been repackaged and is now available in a 12.82-oz. recyclable pack featuring the USDA Organic and Facebook logos. It contains spinach, aged provolone cheese, feta cheese and garlic, a light and crispy multi-grain crust and no artificial flavors, colors, preservatives or GMO's.

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

Lotus Special Soup Vegetables (Brazil)

Lotus Sopa Especial (Special Soup Vegetables) are now available. The gluten-free product has been sanitized and retails in a 600g pack.

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

Il Cuore Verde di Fratelli Beretta Soy and Spinach Burgers (Italy)

Il Cuore Verde di Fratelli Beretta Burger Soia e Spinaci (Soy and Spinach Burgers) are now available. These 100% vegetarian burgers have been made from spinach leaves and are said to be a source of protein. This gluten-free product is immediately ready, cooking in four minutes in a pan, and retails in a 150g pack containing two units.

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

Source: Mintel (2016)

Australian Spinach Launches:
L3M (June – September 2016)

Yumi's Deli Range Mushroom, Spinach & Thyme Pesto

Bruce Greener Cold Pressed Juice

Mamia Organic Garden Pea, Zucchini & Spinach Puree

Quorn Cheese & Spinach Schnitzels

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

The Daily Juice Company Nourish Apple, Celery, Lemon & Spinach Juice

Source: Mintel (2016)

Parsnip.

This wave sees a continual decline in purchase frequency of parsnip, which is also reflected in lower purchase through multiple channels.

On average, parsnips are consumed around five times a month.

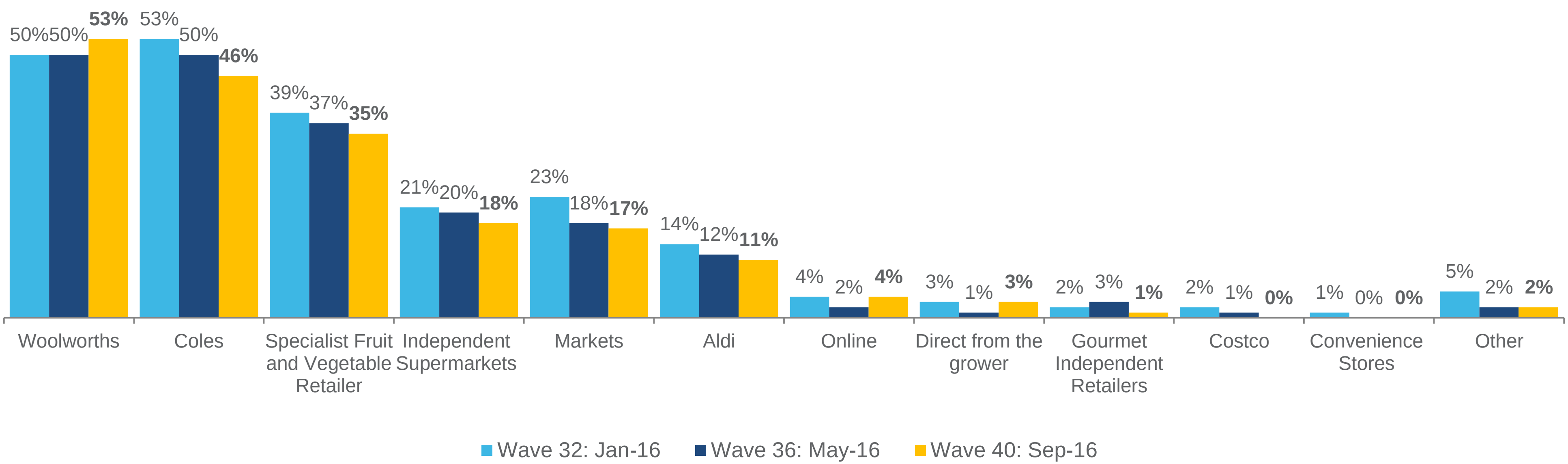
Average Purchase **2.3** times per month

▲ 3.2 times, Wave 32
▲ 3.1 times, Wave 36

Average Consumption **4.7** times per month

▲ 5.2 times, Wave 32
▼ 4.5 times, Wave 36

Purchase Channels



Q1. On average, how often do you purchase Parsnips?
Q2. On average, how often do you consume Parsnips?
Q5. From which of the following channels do you typically purchase Parsnips?
Sample Wave 32 N=206, Wave 36 N=202, Wave 40 N=201

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

Average Spend and Price Sensitivity.

Average weight of purchase

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

▲ 900g, Wave 32
▲ 800g, Wave 36

Recalled last spend

Recalled last spend on parsnips was **$3.60**, which has trended downwards over the last three waves.

▲ $4.50, Wave 32
▲ $3.90, Wave 36

Value for money

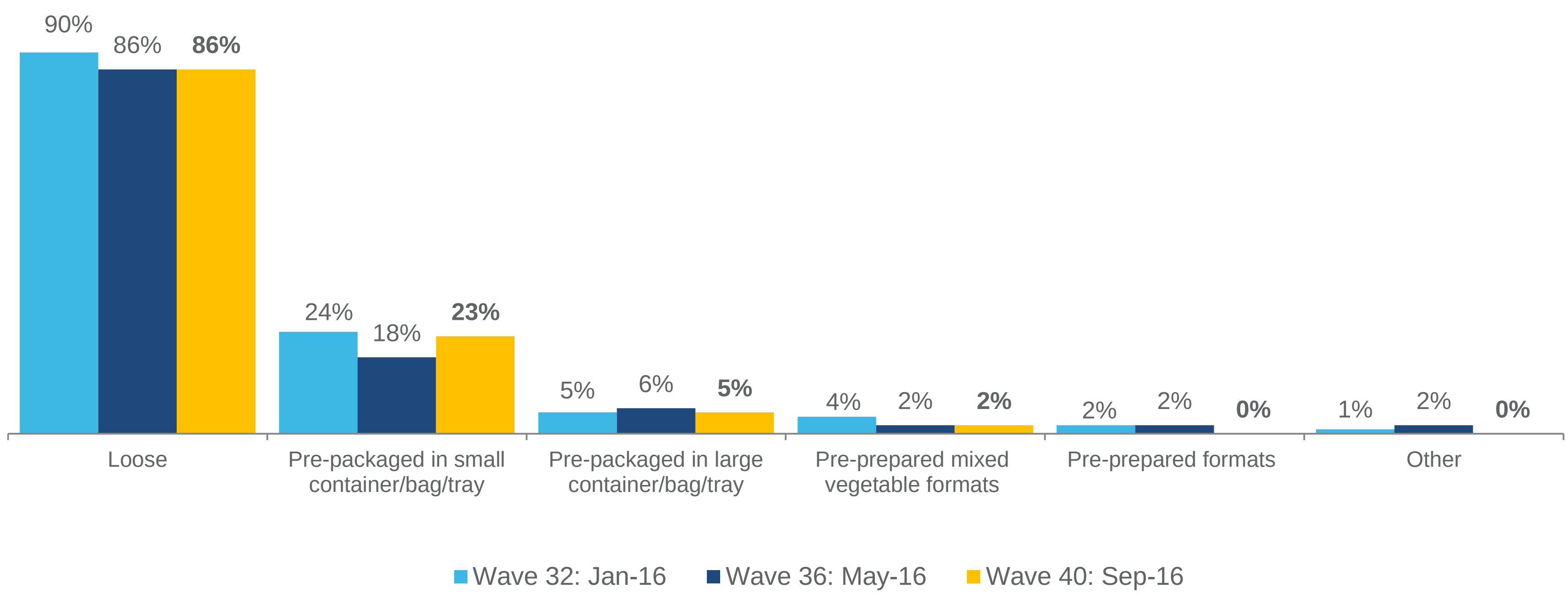
Consumers' perceived value for money is fair for parsnips **(5.7/10)**, slightly higher than the previous waves.

▼ 5.6/10, Wave 32
▼ 5.5/10, Wave 36

Q3. How much Parsnip do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 32 N=206, Wave 36 N=202, Wave 40 N=201

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

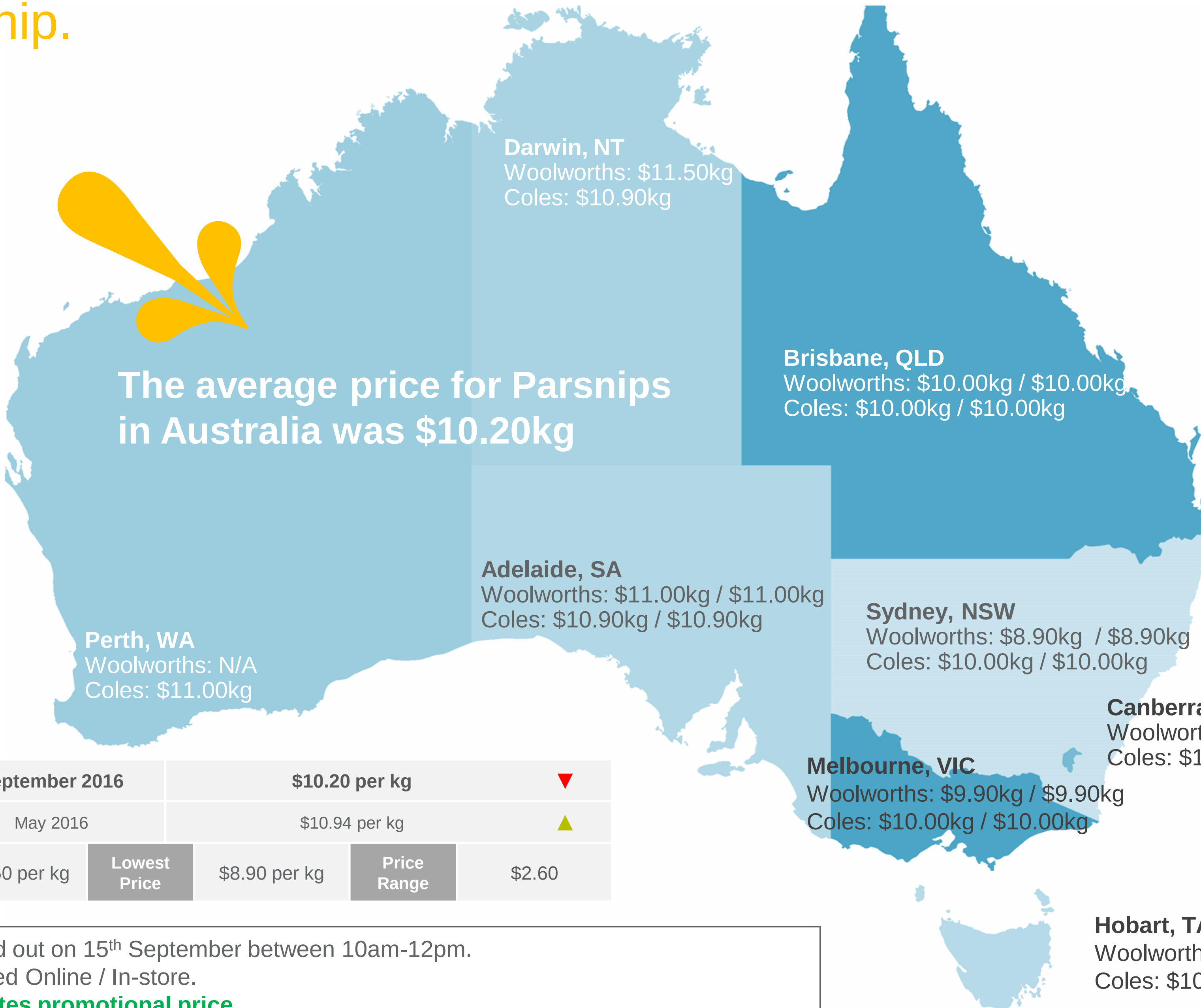
Individual parsnips remain the most common purchase format, consistent with past waves.



Q4b. In what fresh formats do you typically purchase Parsnips?
Sample Wave 32 N=206, Wave 36 N=202, Wave 40 N=201

Online and In-store Commodity Prices

Parsnip.



Average Price	**September 2016**		**$10.20 per kg** ▼		
	May 2016		$10.94 per kg ▲		
Highest Price	$11.50 per kg	**Lowest Price**	$8.90 per kg	**Price Range**	$2.60

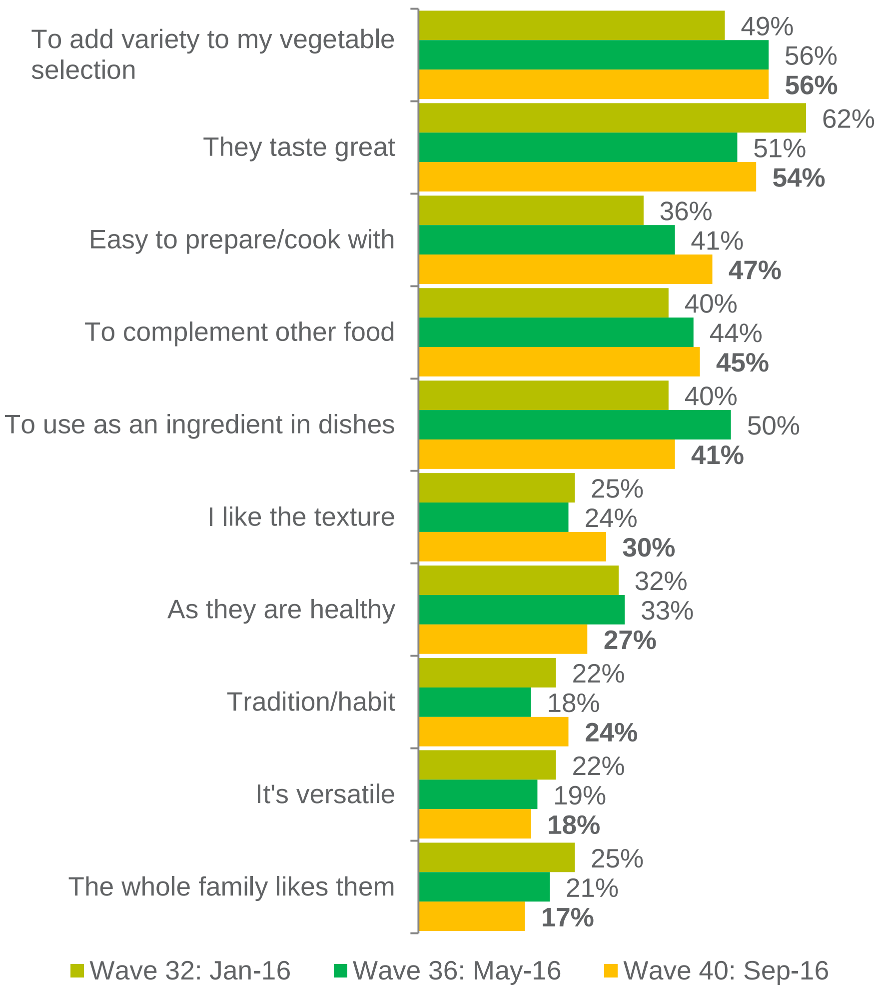
Pricing was carried out on 15th September between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates promotional price.

Awareness of parsnip varieties is low, with 88% of consumers unable to recall a type.

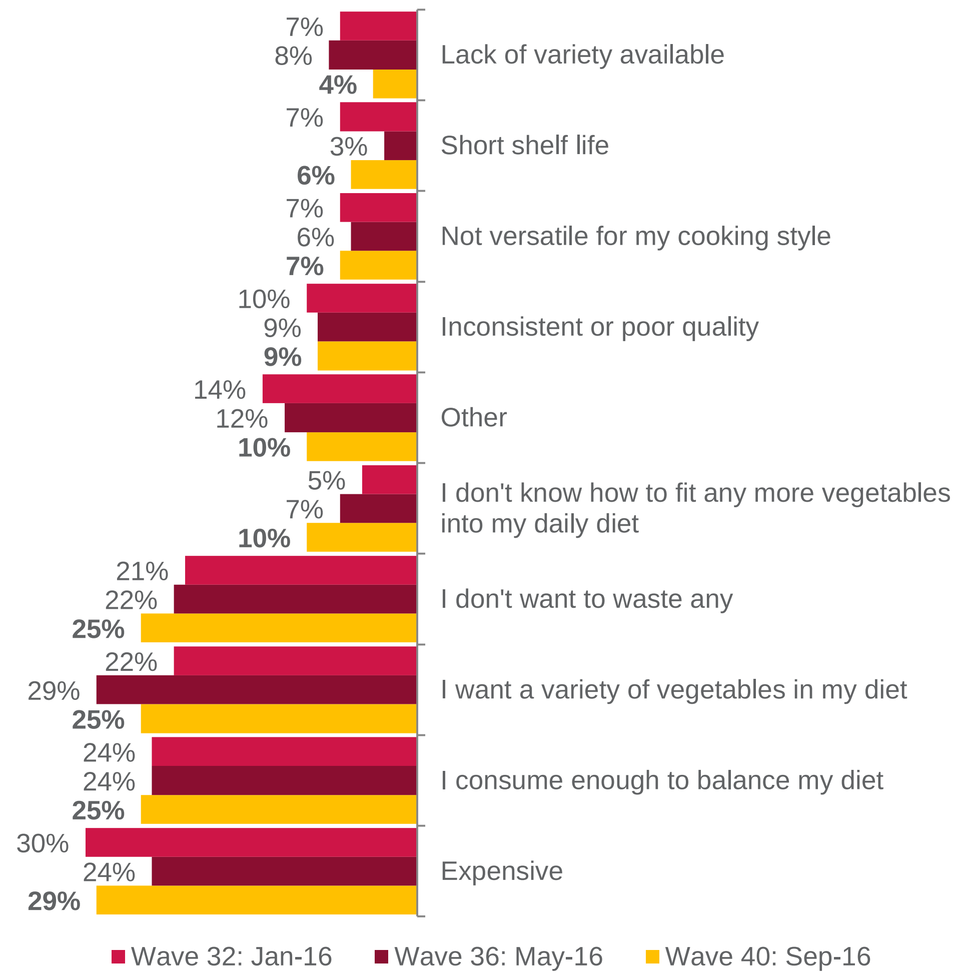
Q6a. What varieties of Parsnip are you aware of? (unprompted)
Sample Wave 32 N=206, Wave 36 N=202, Wave 40 N=201

Adding variety and taste are the key triggers to purchase. In contrast, expense, already consuming enough and wanting variety are the key barriers Ease of preparation and complementing other food have increased as a reason to purchase parsnips over the last three waves.

Triggers



Barriers



Q7. Which of the following reasons best describes why you purchase Parsnips?
Q8. Which reason best describes why you don't buy Parsnips more often?
Sample Wave 32 N=206, Wave 36 N=202, Wave 40 N=201

Horticulture Innovation Australia

colmar brunton.

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

Meal occasions tend to occur during dinner and family meals.

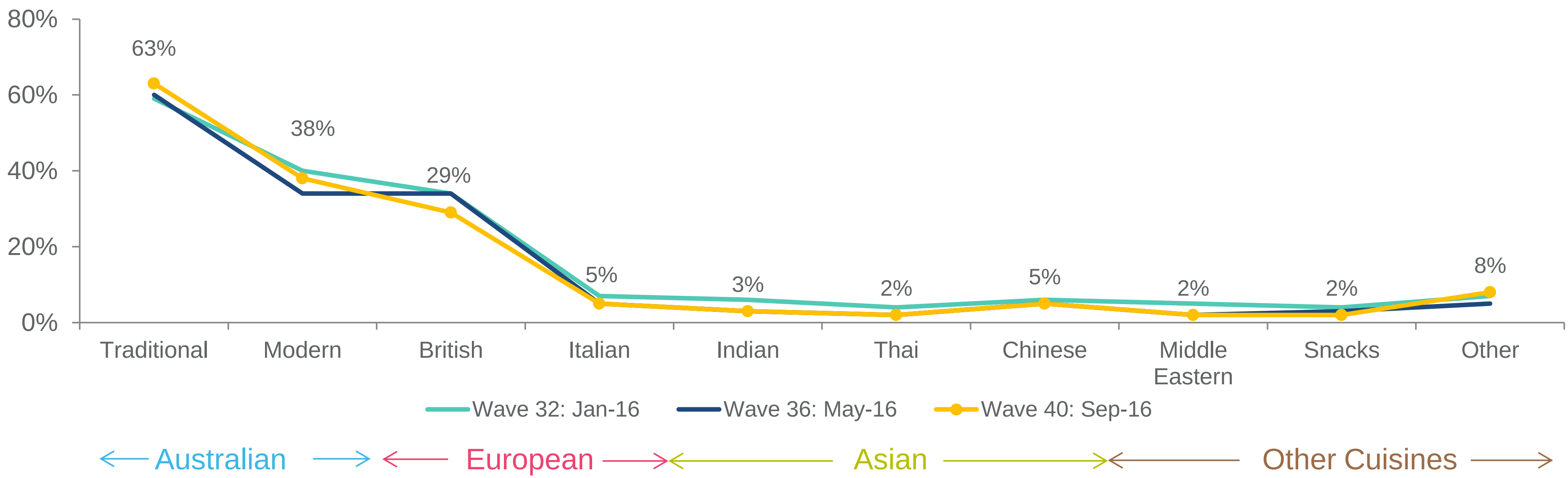
Top 5 Consumption Occasions

	Wave 36	Wave 40
Dinner	70%	**68%**
Family meals	56%	**61%**
Weekday meals	34%	**41%**
Weekend meals	33%	**40%**
Special Occasions	10%	**12%**

6% used parsnip when cooking a new recipe

▲ 12%, Wave 36

Typical Cuisine Cooked



Q10. What cuisines do you cook/consume that use Parsnips?
Q11. Which of the following occasions do you typically consume/use Parsnips?
Sample Wave 32 N=206, Wave 36 N=202, Wave 40 N=201

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

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

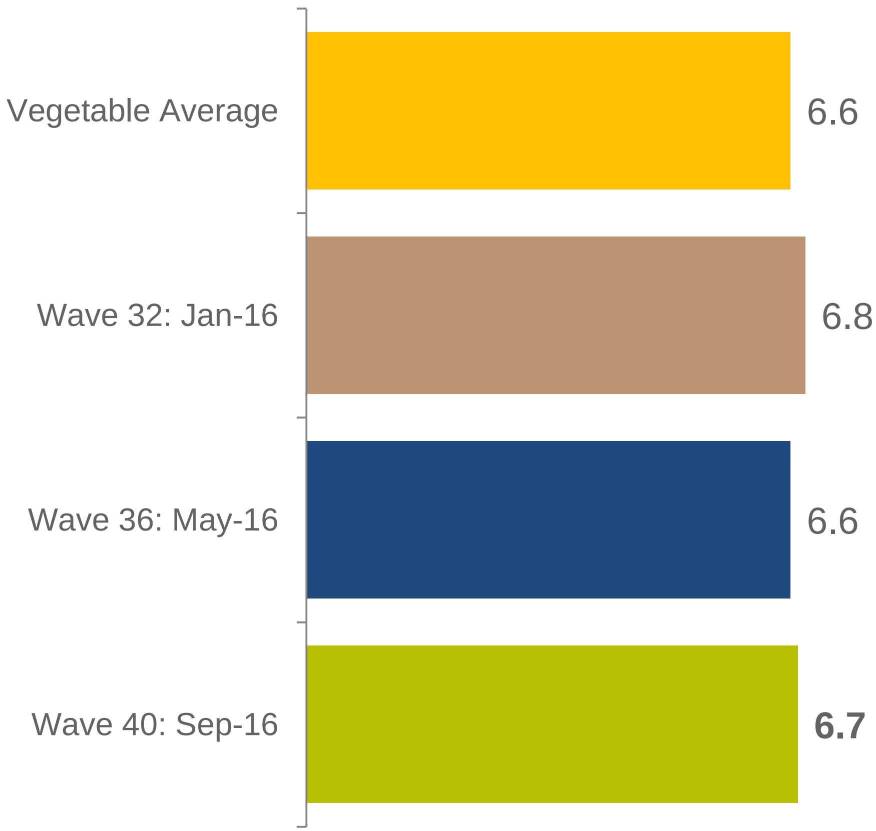
Accompanying Vegetables

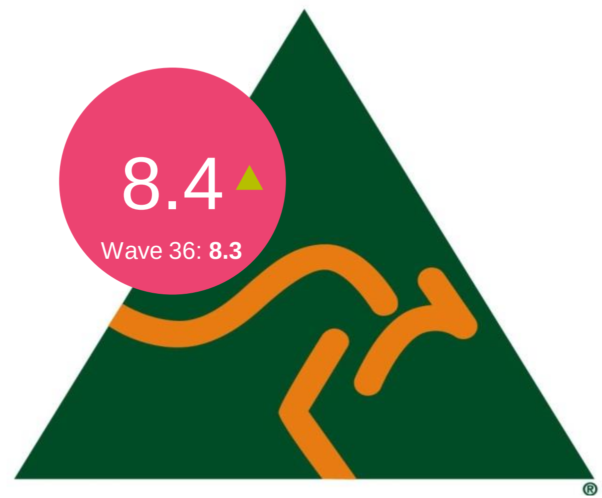
Potatoes	77%
Carrots	72%
Onion	47%
Pumpkin	45%
Sweet Potato	41%

Top 10 Cooking Styles			
	Wave 32	Wave 36	Wave 40
Roasting	70%	64%	**61%**
Soup	40%	48%	**47%**
Baking	36%	25%	**32%**
Slow Cooking	23%	26%	**30%**
Mashing	24%	24%	**26%**
Boiling	21%	14%	**18%**
Steaming	19%	12%	**18%**
Stir frying	11%	8%	**11%**
Microwave	5%	6%	**7%**
Frying	7%	3%	**5%**

Q9. How do you typically cook Parsnips?
Q10a. And when are you serving Parsnips which of the following do you also serve together with this?
Sample Wave 32 N=206, Wave 36 N=202, Wave 40 N=201

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



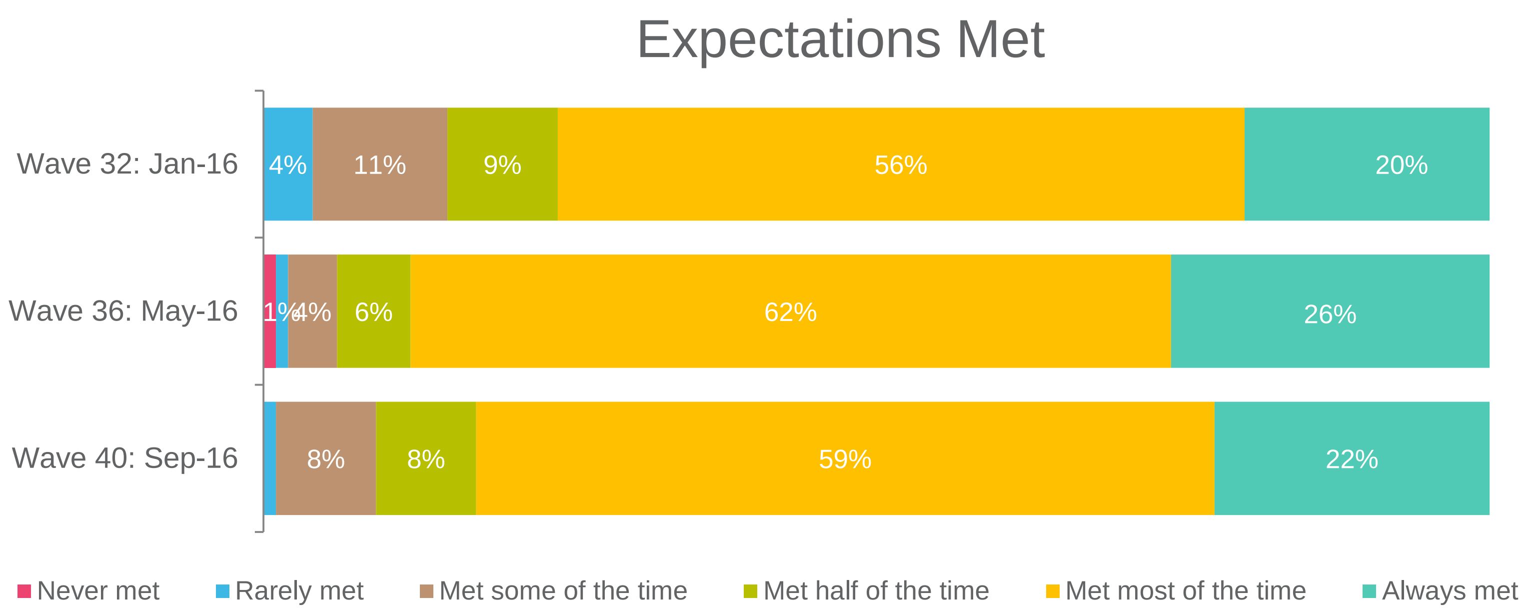


Q14. When purchasing Parsnips, how important is Provenance to you?
Q15. And when purchasing Parsnips, how important is that it is grown in Australia?
Sample Wave 32 N=206, Wave 36 N=202, Wave 40 N=201

Consumers expect parsnips to remain fresh for over a week once purchased. This wave sees a slight decline in these expectations being met at least most of the time.

Expected to stay fresh for **9.6** days

▲ 9.9 days, Wave 32
▼ 8.7 days, Wave 36



Q12. How long do you expect Parsnips to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy Parsnips?
Sample Wave 32 N=206, Wave 36 N=202, Wave 40 N=201

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

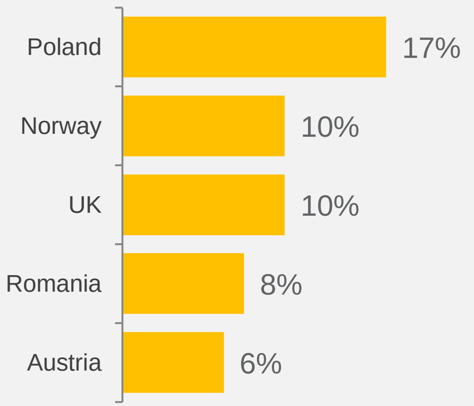
Parsnip Product Launch Trends.

Parsnip Global Launches

June – September 2016

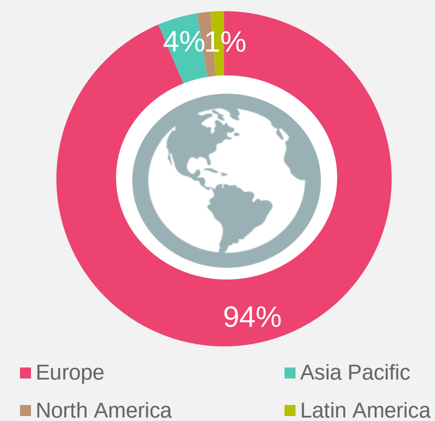
There were 78 parsnip products launched globally over the last three months. The majority of launches were in Poland, Norway and UK. Categories for launches were sauces & seasonings and meals. Key packaging for parsnip products were flexible formats.

Country

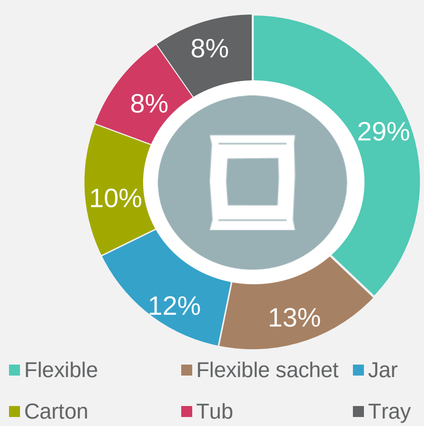


78 Global NPDs

Region



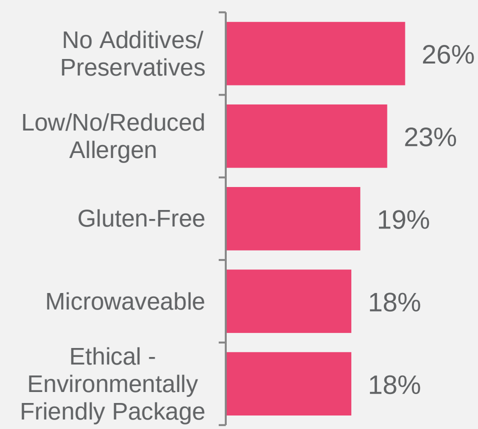
Top Pack Formats



Categories

- Sauces & Seasonings 27%
- Meals 15%
- Snacks 15%
- Soup 15%

Top Claims



Parsnip Product Launches:
Last 3 Months (June – September 2016)
Summary

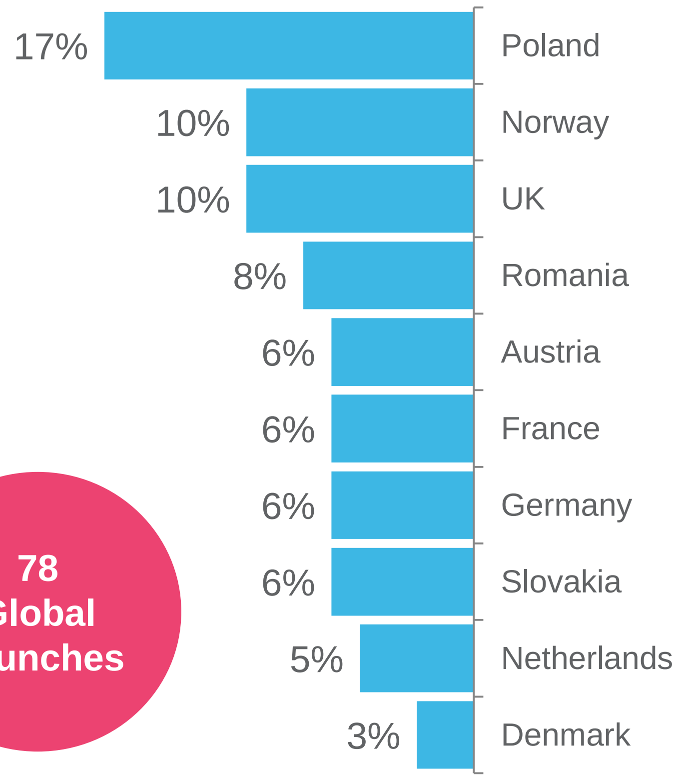
- There were 78 launches in the past 3 months globally that contained parsnip as an ingredient.
- There were no products launched in Australia over the past three months.
- Europe (94%) was the key region for launches.
- Flexible packaging (29%) and flexible sachets (13%) were the most common formats used for products.
- The main categories for launches were sauces & seasonings (27%), meals (15%), snacks (15%), and soups (15%).
- Claims used on products included no additives/preservatives (26%), low/no/reduced allergen (23%), and gluten-free (19%).
- The most innovative products were Parsnip Crisps which were launched in multiple countries. Examples of these can be found in the following pages.

Source: Mintel (2016)

The majority of launches occurred in Poland, Norway and UK.

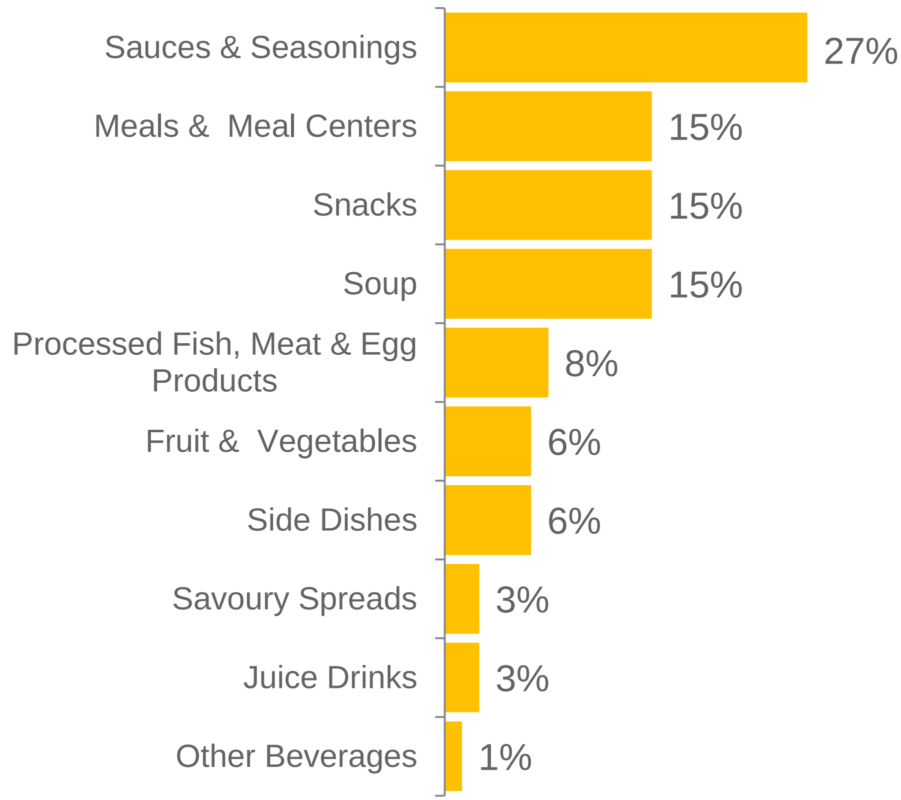
The key categories for parsnip launches are sauces & seasonings, meals, snacks and soups.

Top Launch Countries



78 Global Launches

Top Launch Categories



The main claims globally were no additives/preservatives, low/no/reduced allergen and gluten-free. Flexible packaging, flexible sachets and jars are the main formats for parsnip products.

Pack Formats Used

	Format	%
Global	Flexible	29%
	Flexible sachet	13%
	Jar	12%
Europe	Flexible	29%
	Flexible sachet	14%
	Jar	12%

Top Claims Used

	Claim	%
Global	No Additives/Preservatives	26%
	Low/No/Reduced Allergen	23%
	Gluten-Free	19%
Europe	No Additives/Preservatives	25%
	Low/No/Reduced Allergen	22%
	Microwaveable	18%

Only regions with n >30 are displayed

Innovative Parsnip Launches:
L3M (June – September 2016)

Kettle Vegetable Chips Salted Beetroot, Golden Parsnip and Carrot Crisps (France)

Kettle Vegetable Chips Chips Salée de Betterave, Panais et Carotte Frits (Salted Beetroot, Golden Parsnip and Carrot Crisps) are now available. The product retails in a 40g pack and is also available in a 125g pack.

Claims:
N/A

Crosse & Blackwell Best of British Spicy Parsnip & Carrot Soup (UK)

Crosse & Blackwell Best of British Spicy Parsnip & Carrot Soup is said to have been made only with the finest ingredients from British farms and to be full of flavour. This microwaveable soup provides 1 of 5 a day, is suitable for vegetarians, has no artificial flavours, colours or preservatives, and retails in a 400g recyclable can.

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

Heli Klasicke Pork Schnitzel with Potato Salad (Slovakia)

Heli Klasicke Veprovy Rizek s Bramborovym Salatem (Pork Schnitzel with Potato Salad) has comprises two pieces of pork schnitzel and traditional Czech potato salad. This microwaveable product retails in a 370g pack.

Claims:
Microwaveable

Fruity King Cold Pressed Vegetable Juice with Carrot, Mango, Parsnip, Apple, Pear, Banana and Lime (Denmark)

Fruity King Koldpresset Grøntsagsjuice: Gulerod, Mango, Pastinak, Æble, Pære, Banan, Lime (Cold Pressed Vegetable Juice with Carrot, Mango, Parsnip, Apple, Pear, Banana and Lime) contains 1250g vegetables and fruit per 750ml of juice. The product retails in a 750ml bottle.

Claims:
N/A

Source: Mintel (2016)

Innovative Parsnip Launches:

L3M (June – September 2016)

Donnybrook Fair Oak Smoked Chicken with Quinoa Salad (Ireland)

Donnybrook Fair Oak Smoked Chicken with Quinoa Salad is prepared daily using only the freshest, seasonal vegetables. This product retails in a 250g pack.

Claims:
N/A

Kløver Coarse Chopped Root Vegetables (Norway)

Kløver Grovkuttede Rotgrønnsaker (Coarse Chopped Root Vegetables) with rutabaga, carrot, celery, red onion and parsnip are ready in seven minutes. The product retails in a 750g pack featuring the Green Keyhole and Nyt Norge logos and preparation instructions.

Claims:
N/A

Pirkka Large Sized Wok Vegetables (Finland)

Pirkka Isot Palat Wokvihannekset (Large Sized Wok Vegetables) are now available. This product cooks in eight to ten minutes in a pan, and retails in a 750g pack that features a recipe suggestion.

Claims:
N/A

Bio Zentrale Vegetable Chips with Parsnip, Beetroot, Carrot & Sweet Potato (Germany)

Bio Zentrale Gemüse Chips Pastinake, Rote Beete, Karotte, Süsskartoffel (Vegetable Chips with Parsnip, Beetroot, Carrot & Sweet Potato) have been repackaged in a newly designed pack. This vegan and organic certified product is free from gluten, lactose, yeast extract and flavour enhancers, and retails in a 90g pack, featuring the Bio and EU Green Leaf logos, and a Facebook link.

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

Source: Mintel (2016)

Innovative Parsnip Launches:
L3M (June – September 2016)

Toro Fersk Vegetable Pasta with 40% Root Vegetables (Norway)

Toro Fersk Grønnsakspasta med 40% Rotgrønnsaker (Vegetable Pasta with 40% Root Vegetables) is formulated with 40% beetroot, carrot and parsnip, and is made with only natural ingredients. It is a natural source of fibre, contains no added salt, and cooks in two to three minutes. The pasteurised product retails in a recyclable 225g pack, providing two portions and featuring a QR code.

Claims:
All Natural Product, Low/No/Reduced Sodium, Ethical - Environmentally Friendly Package

Zdrowo Vita Smile Barley Groats with Vegetables (Poland)

Zdrowo Vita Smile Kasza Jeczmienna z Warzywami (Barley Groats with Vegetables) is now available. This product can be easily prepared in 15 minutes. The product retails in a 200g pack, which contains 2 bags x 100g.

Claims:
Ease of Use

Kiwa Parsnip Crisps (Ecuador)

Kiwa Chips de Zanahoria Blanca (Parsnip Crisps) are now available. This socially responsible product has been made with ingredients sourced through direct trade and with only sustainable ingredients from Ecuador. It is described as a crunchy chip which provides a fascinating flavor experience and is low in sugar and free of GMO and gluten. The product retails in a 145g pack.

Claims:
Low/No/Reduced Sugar, Gluten-Free, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Product, Ethical - Human, GMO-Free

Proper Lightly Salted Parsnip Hand Cooked Crisps (New Zealand)

Proper Lightly Salted Parsnip Hand Cooked Crisps are now available. They have been batch cooked traditionally by hand in 100% high oleic sunflower oil, sprinkled with sea salt, thus sealing in the natural sweetness and flavour of the parsnip. This 100% natural product does not contain gluten, GMO, dairy or added MSG, is suitable for vegetarians and is a good source of increased fibre. This anytime, anywhere snack retails in a 100g pack.

Claims:
No Additives/Preservatives, All Natural Product, High/Added Fiber, Vegetarian, Gluten-Free, Low/No/Reduced Allergen, On-the-Go, GMO-Free

Source: Mintel (2016)

Beetroot.

Purchase of beetroot has slightly increased over the last three waves, with a decline in consumption this wave.

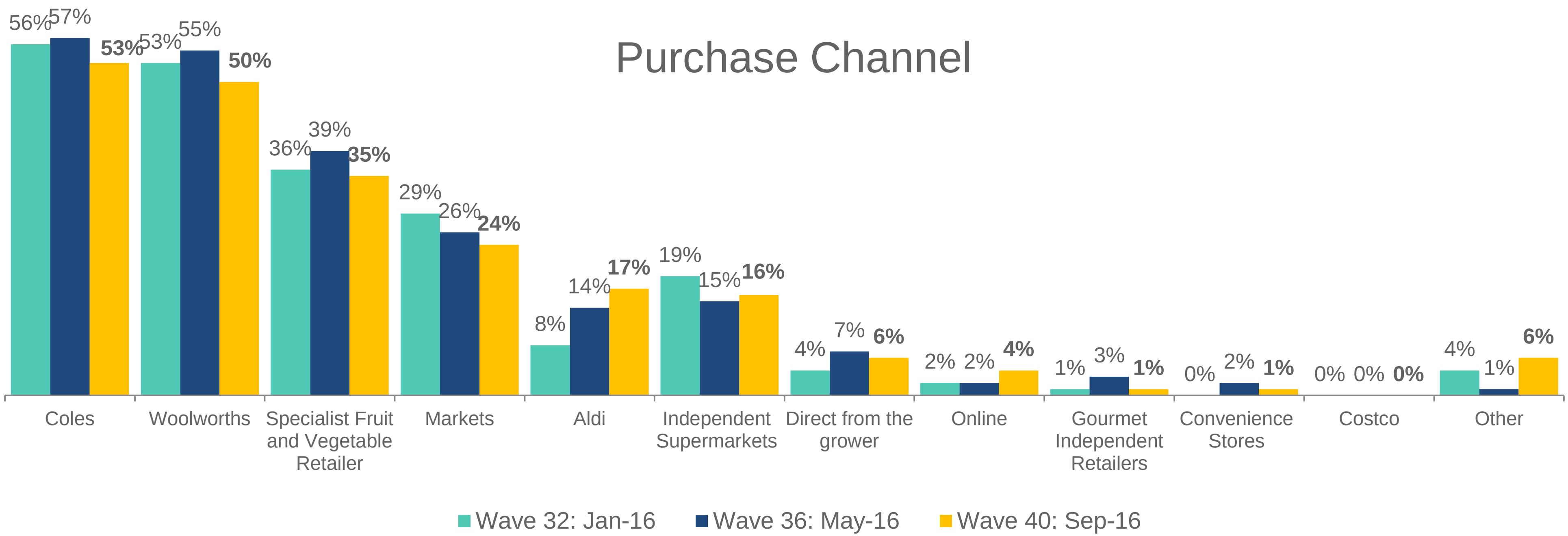
There has been a continuous increase in purchase from Aldi over the last three waves, whereas purchase from markets has declined.

Average Purchase **3.4** times per month

▼ 3.0 times, Wave 32
▼ 3.1 times, Wave 36

Average Consumption **7.8** times per month

▲ 8.1 times, Wave 32
▲ 8.3 times, Wave 36



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 32 N=207, Wave 36: N=202, Wave 40: N=202

Average Spend and Price Sensitivity.

Average weight of purchase

The average consumer typically purchases **0.8kg** of beetroots, which is slightly lower than the previous waves.

▲ 0.9kg, Wave 32
▲ 0.9kg, Wave 36

Recalled last spend

The average recalled last spend is **$3.70** in September 2016, consistent with the previous wave.

▲ $3.90, Wave 32
— $3.70, Wave 36

Value for money

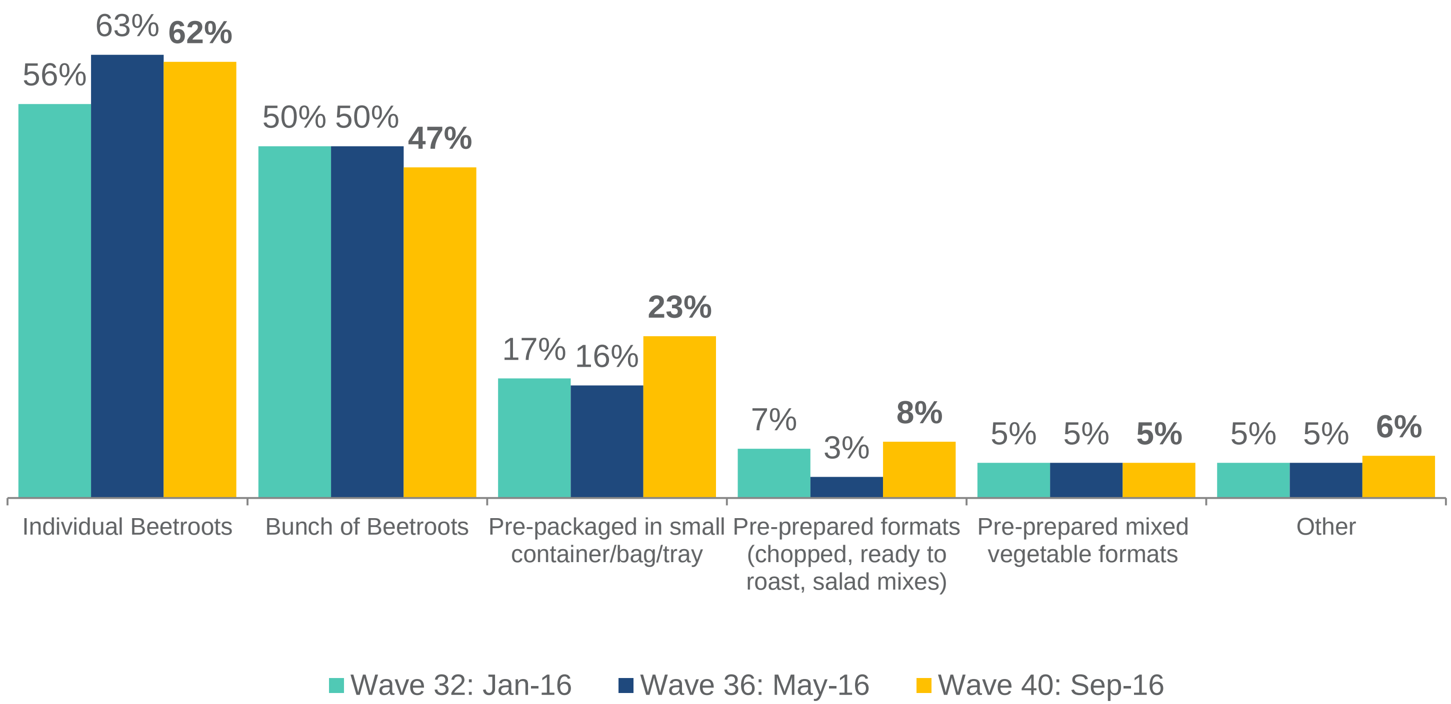
On average, consumers perceive beetroot to be good value for money **(6.6/10)**, which has slightly increased over the last three waves.

▼ 6.4/10, Wave 32
▼ 6.5/10, Wave 36

Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typical purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 32 N=207, Wave 36: N=202, Wave 40: N=202

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

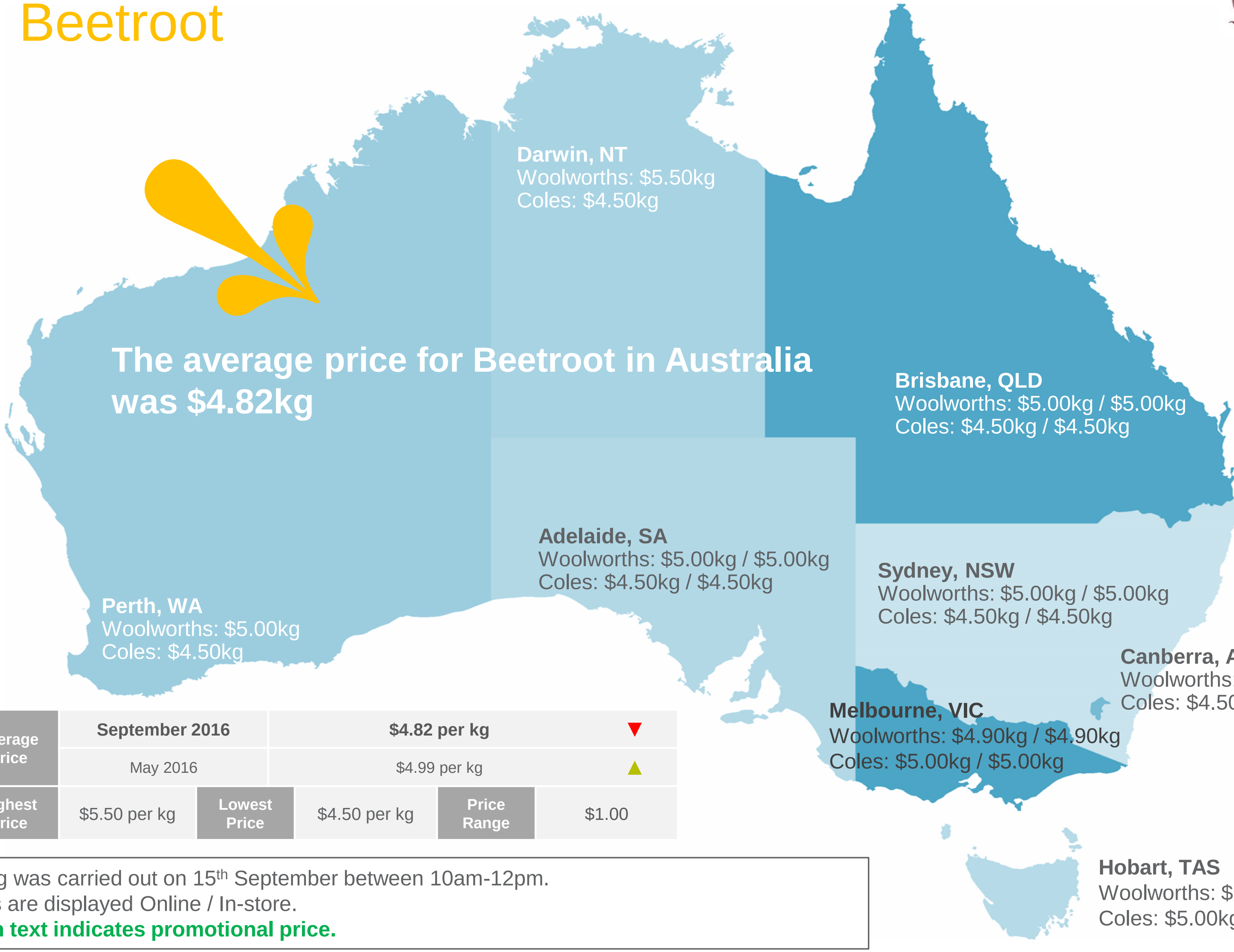
Both individual and bunched beetroot formats appeal most to consumers, consistent with past waves. This wave sees a noticeable increase in purchase of beetroot in small pre-packaged containers.



Q4b. In what fresh formats do you typically purchase Beetroot?
Sample Wave 32 N=207, Wave 36: N=202, Wave 40: N=202

Online and In-store Commodity Prices

Beetroot

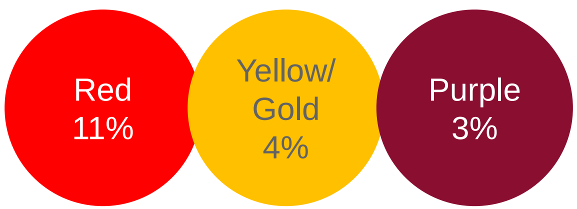


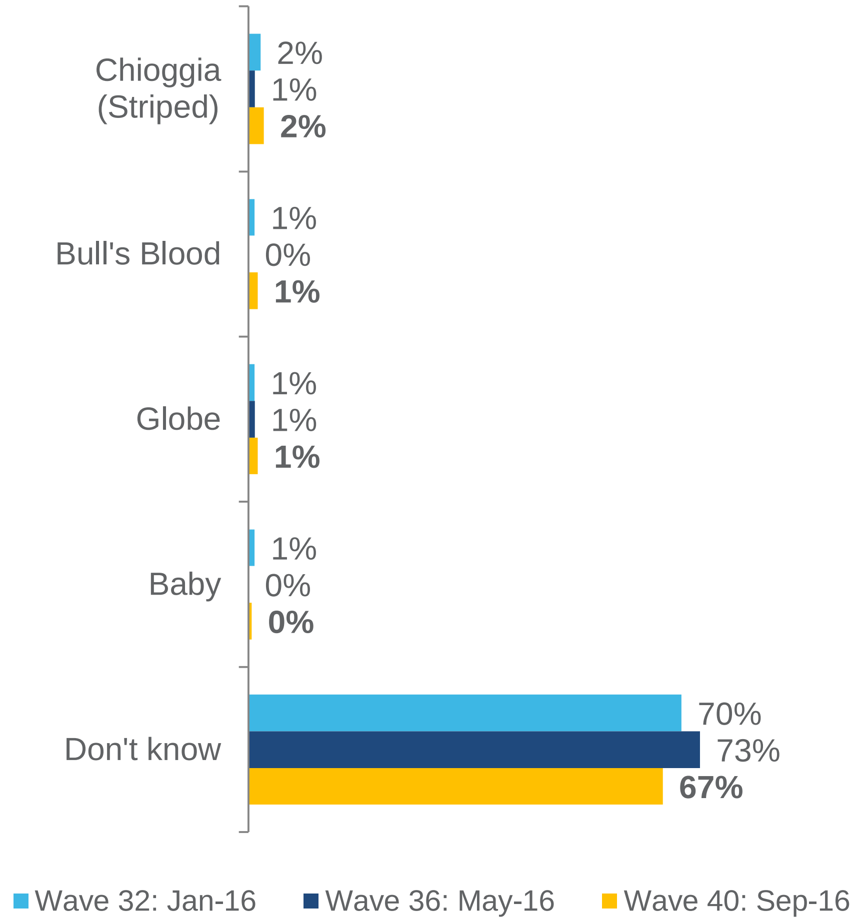
Average Price	**September 2016**	**$4.82 per kg** ▼			
	May 2016	$4.99 per kg ▲			
Highest Price	$5.50 per kg	**Lowest Price**	$4.50 per kg	**Price Range**	$1.00

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

Awareness of beetroot varieties is consistently low across waves, with approximately two thirds of consumers unable to recall a type.

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

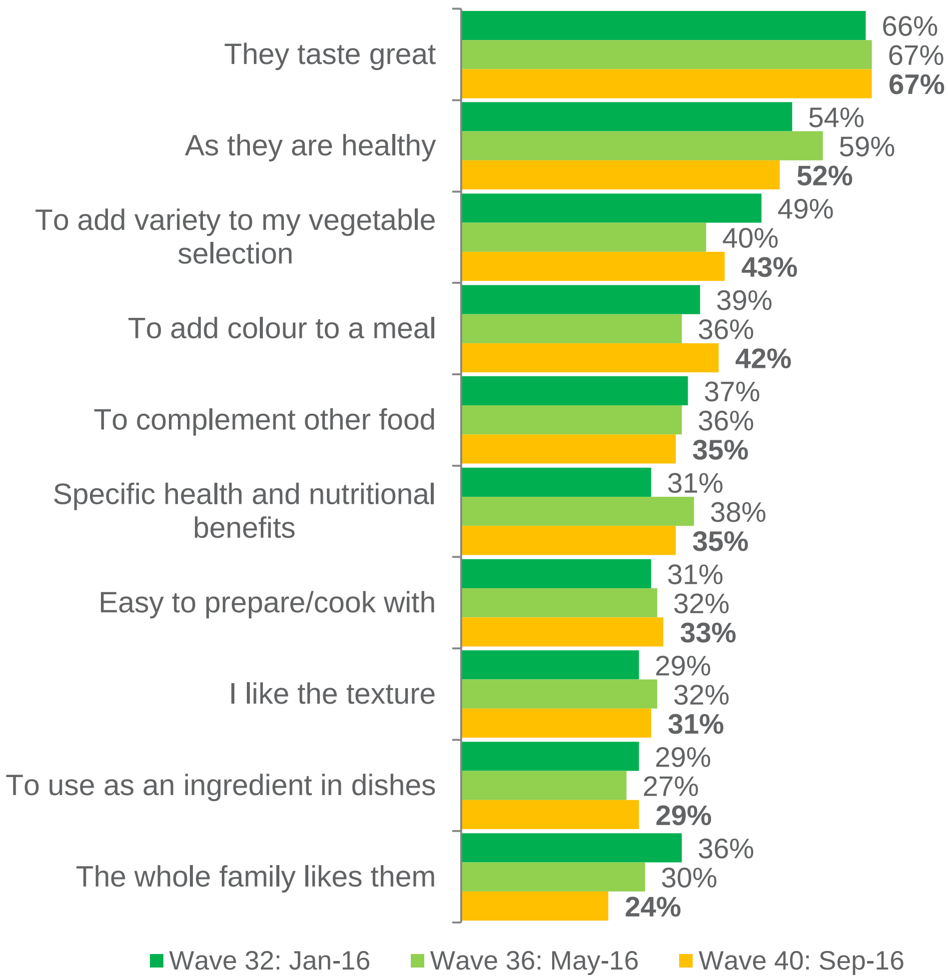




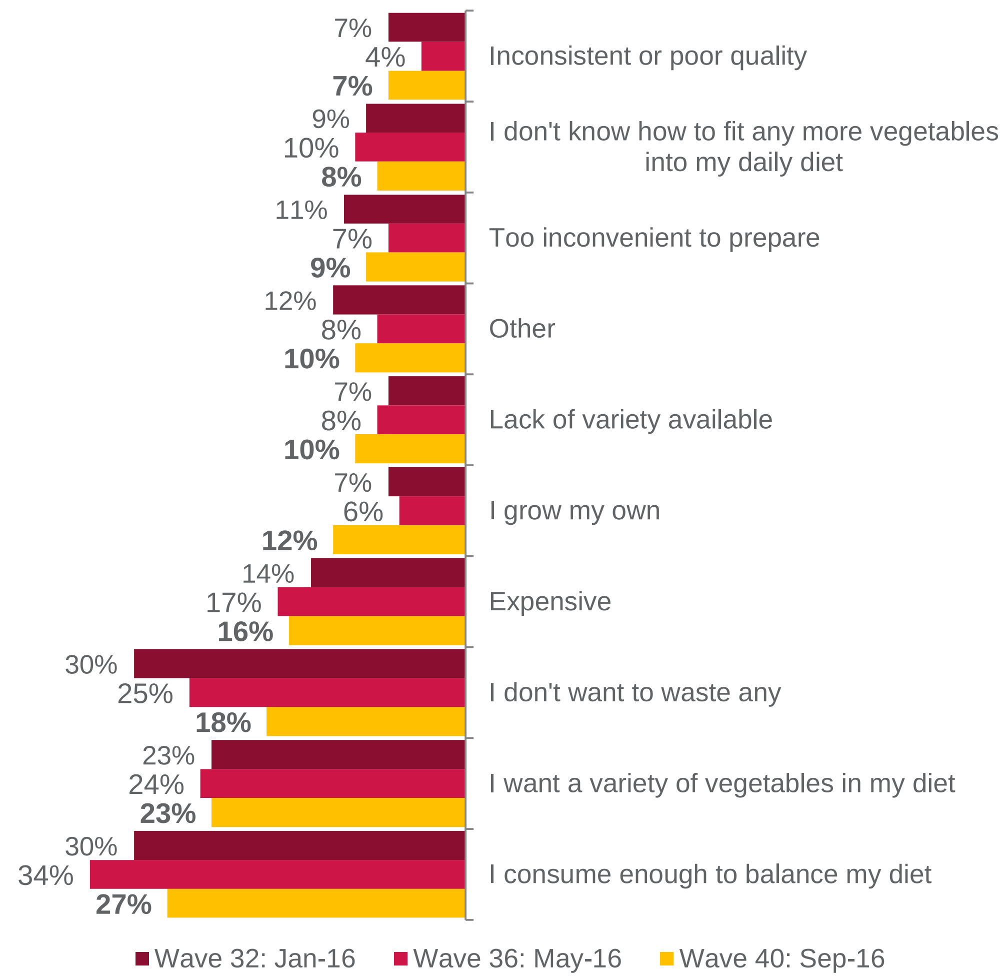
Q6a. What varieties/types of <commodity> are you aware of? (unprompted)
Sample Wave 32 N=207, Wave 36: N=202, Wave 40: N=202

The main triggers for beetroot purchase are taste and health. Consumers list having enough to balance their diet and wanting a variety of vegetables in their diet as the key barriers to purchase. Not wanting to waste any has declined as a factor preventing future 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 32 N=207, Wave 36: N=202, Wave 40: N=202

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

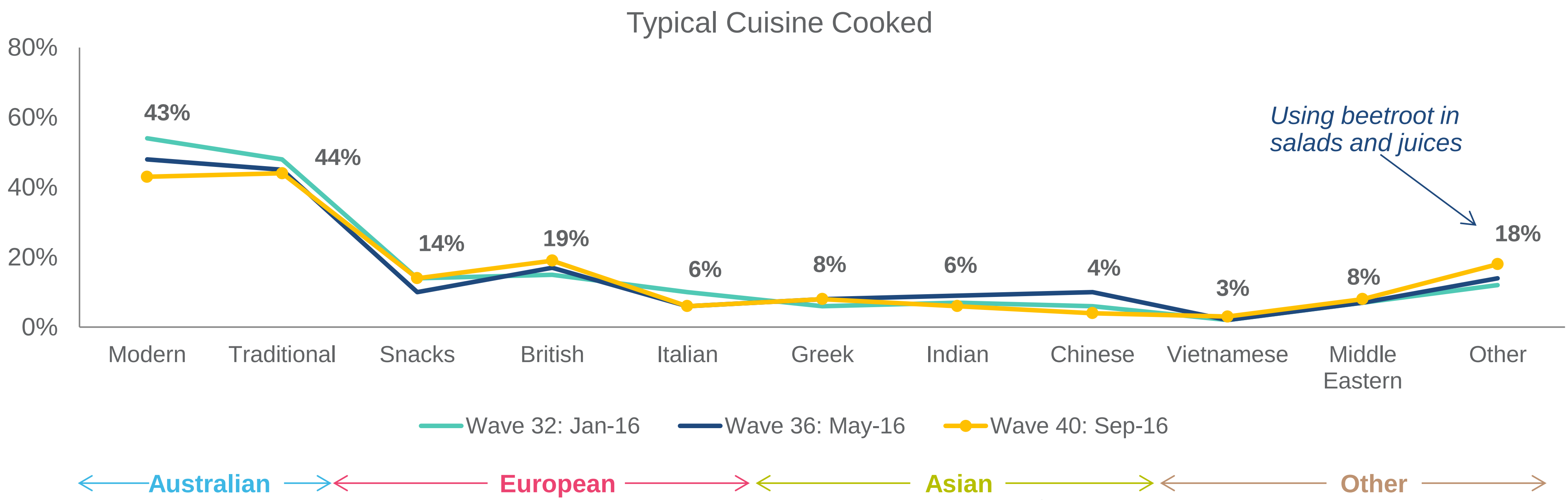
Consumption occasions are generally during dinner and family meals. This wave sees a return to levels found in Wave 32 in beetroot being used in new recipes.

Top 5 Consumption Occasions

	Wave 36	Wave 40
Dinner	62%	**61%**
Family meals	50%	**53%**
Lunch	42%	**35%**
Weekend meals	29%	**35%**
Weekday meals	31%	**31%**

16% used beetroot when cooking a new recipe

▼ 7%, Wave 36



Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?
Sample Wave 32 N=207, Wave 36: N=202, Wave 40: N=202

Horticulture Innovation Australia

colmar brunton.

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

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

Accompanying Vegetables

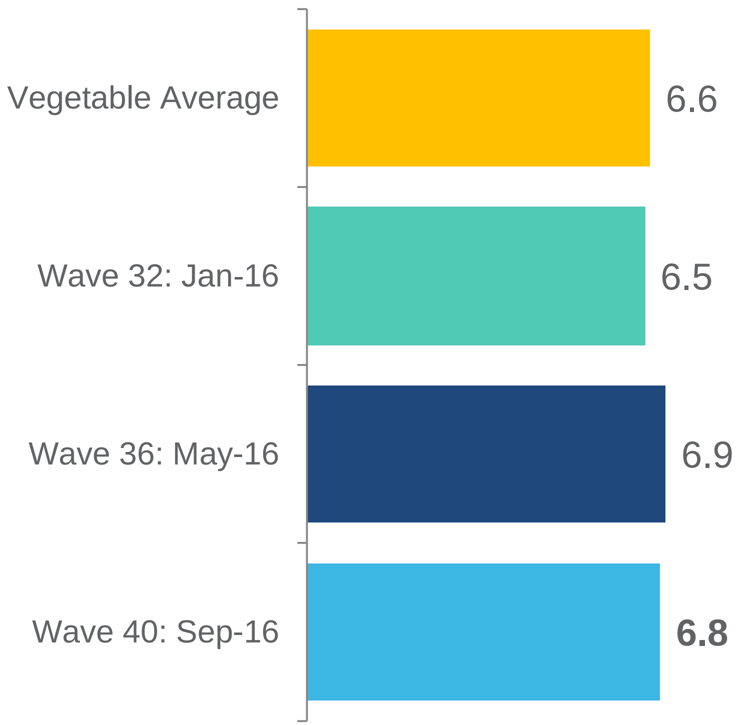
Potatoes	40% ▲
Carrots	39% ▼
Onions	38% –
Tomatoes	37% ▲
Lettuce	33% ▲

Top Cooking Styles

	Wave 32	Wave 36	Wave 40
Roasting	45%	42%	**49%**
Boiling	43%	46%	**39%**
Raw	33%	27%	**28%**
Baking	25%	24%	**24%**
Steaming	20%	18%	**21%**
Slow Cooking	14%	13%	**13%**
Soup	12%	15%	**10%**
Grilling	3%	4%	**9%**
Microwave	8%	2%	**8%**
Stir frying	9%	8%	**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 32 N=207, Wave 36: N=202, Wave 40: N=202

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



8.2 ▽

Wave 36: **8.4**

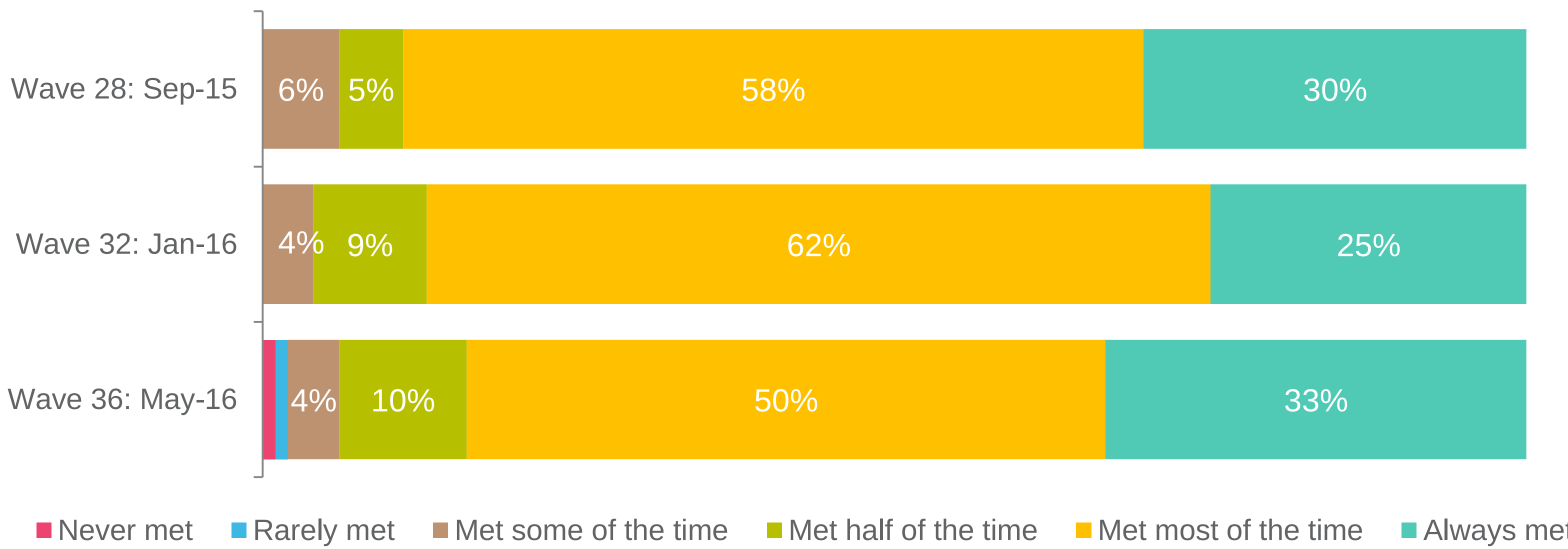
Q14. When purchasing <commodity>, how important is Provenance to you?
Mean scores out of 10.
Sample Wave 32 N=207, Wave 36: N=202, Wave 40: N=202

Consumers expect beetroot to remain fresh for 11 days once purchased, a noticeable increase from recent waves. This wave sees an indicative increase in freshness expectations always being met.

Expected to stay fresh for **11.0** days

▼ 9.7 times, Wave 32
▼ 9.6 times, Wave 36

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 32 N=207, Wave 36: N=202, Wave 40: N=202

Horticulture Innovation Australia

colmar brunton.

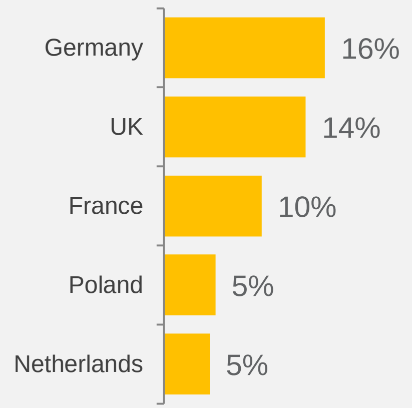
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Trends: Beetroot

Beetroot Global NPDs
June – September 2016

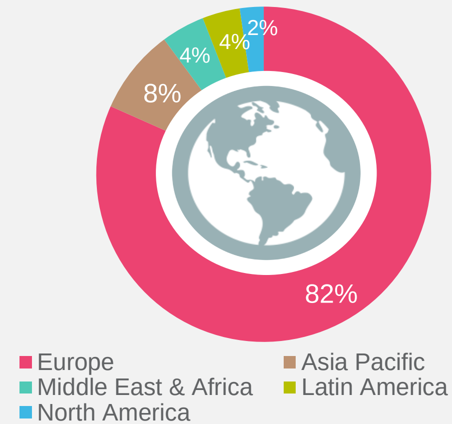
There were 523 products containing beetroot as an ingredient launched globally in the last three months. The majority of these launches occurred in Europe, in particular Germany and UK. Products were launched in desserts & ice cream, dairy, processed products and snacks.

Country

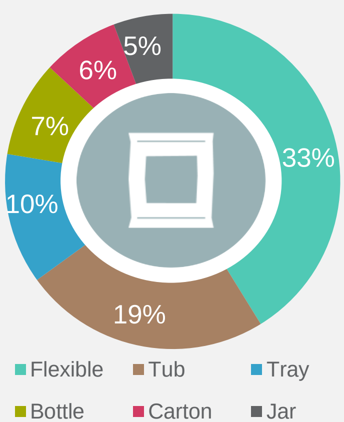


523 Global Launches

Region



Top Pack Formats



Categories

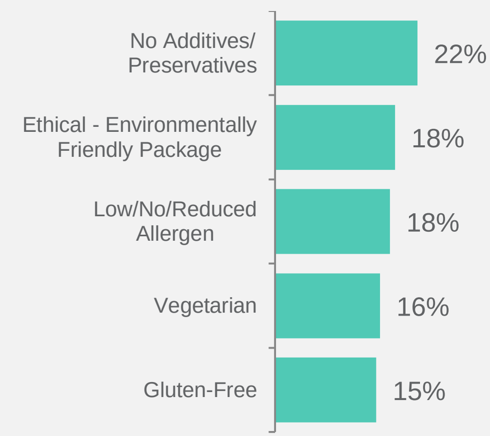
Desserts & Ice Cream 14%

Dairy 12%

Processed Products 10%

Snacks 7%

Top Claims



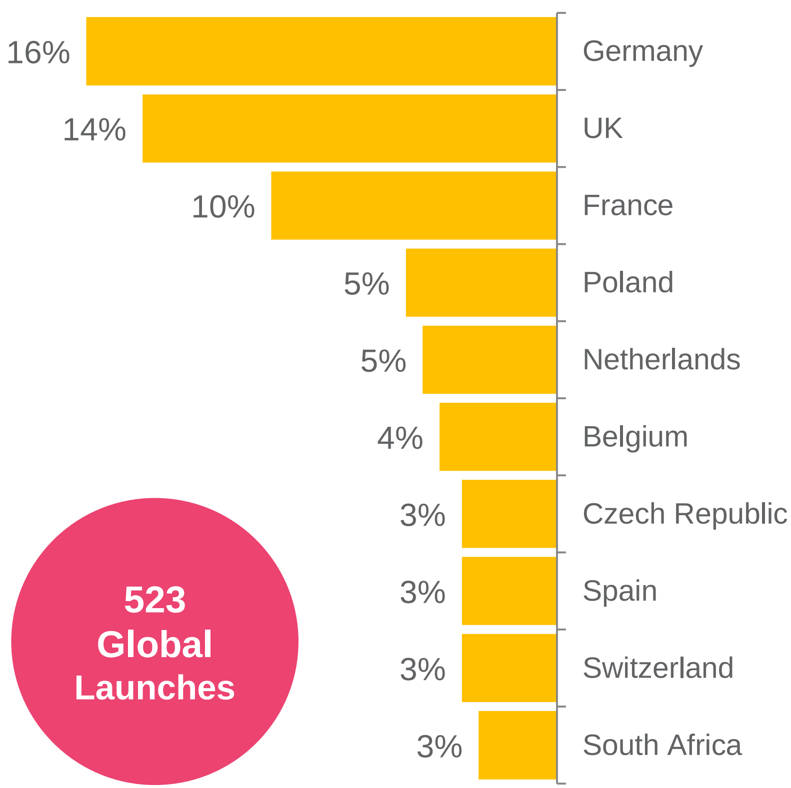
Beetroot Product Launches:
Last 3 Months (June – September 2016)
Summary

- There were 523 global beetroot products launched globally over the last three months.
- There were 3 products launched in Australia this wave.
- The majority of products were launched in Europe (82%). Key countries for launches were Germany (16%) and UK (14%).
- Flexible packaging was the most common format used (33%). Tubs were also popularly utilised (19%).
- Top launch categories were desserts & ice creams (14%), dairy (12%), processed products (10%), and snacks (8%).
- Popular claims were around no additives/preservatives (22%), and ethical/environmentally friendly packaging (18%).
- The most innovative beetroot product launched was Veggie Ice Lollies from Israel (examples of these can be found in the following pages).

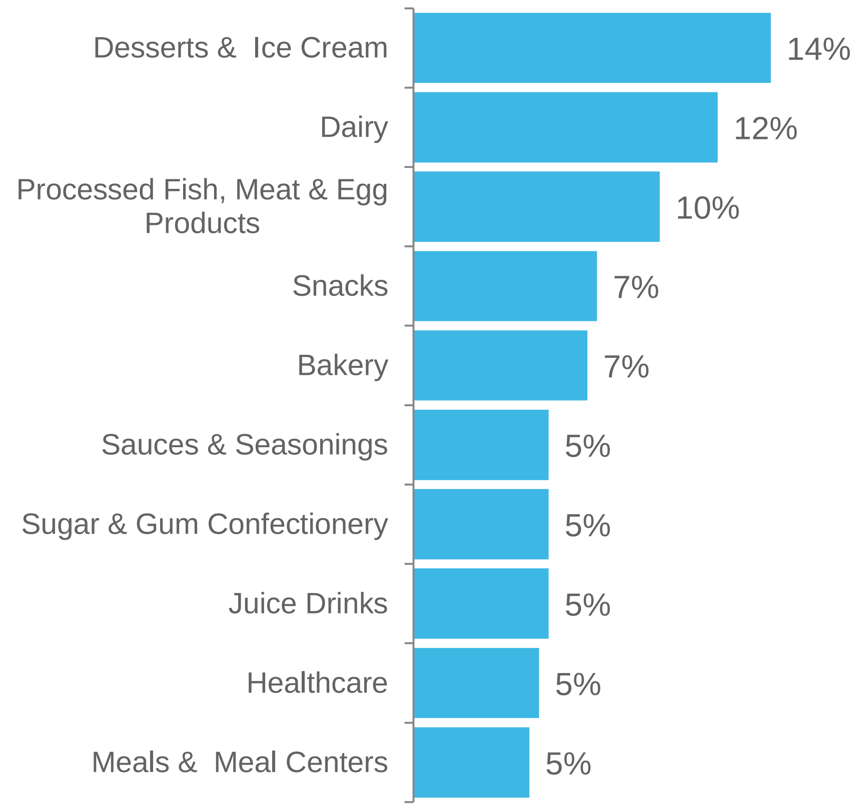
Source: Mintel (2016)

Consistent with the previous waves, Germany and the UK were the key countries for product launches. The key categories for launches included desserts, dairy, processed products and snacks.

Top Launch Countries



Top Launch Categories



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

Pack Formats Used

Global	Flexible	33%
	Tub	19%
	Tray	10%
Europe	Flexible	30%
	Tub	22%
	Tray	12%
Asia Pacific	Flexible	49%
	Bottle	12%
	Flexible sachet	9%

Top Claims Used

Global	No Additives/Preservatives	22%
	Ethical - Environmentally Friendly Package	18%
	Low/No/Reduced Allergen	18%
Europe	No Additives/Preservatives	19%
	Ethical - Environmentally Friendly Package	17%
	Low/No/Reduced Allergen	17%
Asia Pacific	No Additives/Preservatives	49%
	Vegetarian	40%
	Social Media	23%

Only regions with n >30 are displayed

Innovative Beetroot Launches:
L3M (June – September 2016)

Chudova Marka Cooked Sterilised Vegetables for Salad Vinaigrette (Ukraine)

Chudova Marka Vinehret Ovochi Vareni Sterylizovani dlya Salatu (Cooked Sterilised Vegetables for Salad Vinaigrette) requires only the addition of oil. The product is free from GMO and preservatives, and retails in a 400g pack.

Claims:
No Additives/Preservatives, Ease of Use, GMO-Free

DM Bio Beetroot & Horseradish Spread (Germany)

DM Bio Gemüseaufstrich Rote Bete & Meerrettich (Beetroot & Horseradish Spread) is suitable for vegans. The product retails in a 135g pack bearing the EU Green Leaf and BIO logos.

Claims:
Organic, Vegan, No Animal Ingredients

Werda Safari Sweet & Sour Beetroot Salad (South Africa)

Werda Safari Sweet & Sour Beetroot Salad has been relaunched. This halal certified product is suitable for lacto-vegetarians, cholesterol free, can be taken along anytime for outdoor activities and ready to eat. It convenient and fuss free, and retails in a 405g recyclable pack.

Claims:
Low/No/Reduced Cholesterol, Vegetarian, Halal, Ethical - Environmentally Friendly Package, On-the-Go, Ease of Use

Vitamont 50/50 Organic Beetroot and Raspberry Juice (France)

Vitamont 50/50 Betterave Framboise (Organic Beetroot and Raspberry Juice) contains 50% vegetables and 50% fruits and has been formulated with organic fruits and vegetable juices. The organic certified product retails in a recyclable 50cl bottle bearing the AB and EU Green Leaf logos, as well as the ECO Conception logo which means the pack's paper label comes from sustainable materials and is printed with water-based inks.

Claims:
Organic, Ethical - Environmentally Friendly Package

Source: Mintel (2016)

Innovative Beetroot Launches:
L3M (June – September 2016)

Choice Shakepri Veggie Ice Lollies (Israel)

Choice Shakepri Veggie Ice Lollies are now available. This product comprises sorbet ice lollies in two flavours: orange juice and carrot; and lemonade and beets. It contains minimum 40% fruit and vegetables, does not contain food colouring and retails in a 480g pack containing 6 x 80g units.

Claims:
No Additives/Preservatives

Pan Pomidor & Co Lithuanian Cold Beetroot Soup with Beetroot and Horseradish (Poland)

Pan Pomidor & Co Pan Chlodnik Litewski z Burakiem i Rzodkiewka (Lithuanian Cold Beetroot Soup with Beetroot and Horseradish) has been added to the range. The 100% natural product is free from preservatives and dyes, and retails in a 500g pack.

Claims:
No Additives/Preservatives, All Natural Product

The Foraging Fox Smoked Beetroot Ketchup (UK)

The Foraging Fox Smoked Beetroot Ketchup is said to be good with everything. The product is suitable for vegans and vegetarians, and free from allergens, gluten, artificial colourings, flavourings and sweeteners. It retails in a 255g pack bearing the Facebook, Instagram, Pinterest and Twitter logos.

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

Frutae Apple, Beetroot and Gooseberry Juice (Spain)

Frutae Zumo de Manzana, Remolacha y Grosella (Apple, Beetroot and Gooseberry Juice) is now available. The product is a source of fibre, contains 100% squeezed fruit and vegetables, and is equivalent to one of the five daily fruit portion. It retails in a 500ml pack.

Claims:
N/A

Source: Mintel (2016)

Innovative Beetroot Launches:
L3M (June – September 2016)

James White Beet It Organic Beetroot Juice with Ginger (Denmark)

James White Beet It Organic Beetroot Juice with Ginger is made with pressed root ginger juice, which gives a delicious soft, warm and spicy taste. A small amount of carrot juice is also added to produce a lighter, sweeter taste. The juice contains no artificial preservatives and is suitable for vegetarians. The product retails in a 75cl pack featuring the Great Taste 2013 award, Organic Soil Association, EU Green Leaf, Facebook, Twitter and Instagram logos.

Claims:
No Additives/Preservatives, Organic, Vegetarian, Social Media

Saipro Dehydrated Beetroot Flakes (India)

Saipro Dehydrated Beetroot Flakes are suitable for vegetarians. Described as natural, nutritious and easy to cook and store, the HACCP certified product can be used in making salads and curries and retails in a 50g pack.

Claims:
Vegetarian, Ease of Use

Creative Cuisine Pantry Beetroot & Apple Chutney (South Africa)

Creative Cuisine Pantry Beetroot & Apple Chutney is now available. The chutney features hints of Indian spices and is ideal with cheese and meat, on sandwiches or stirred into Greek yoghurt to make a dip. The product retails in a 285g jar.

Claims:
N/A

Love Beets Beetroot Balls with Honey and Ginger (Germany)

Love Beets Honig + Ingwer Rote Beete (Beetroot Balls with Honey and Ginger) are now available. This ready-to-eat product retails in a 180g resealable pack.

Claims:
Ease of Use, Convenient Packaging

Source: Mintel (2016)

Australian Beetroot Launches:
L3M (June – September 2016)

Bruce Redder Cold Pressed Juice

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

Claims:

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

Pilpel Beetroot Almond Dip

Pilpel Beetroot Almond Dip has been repackaged. The kosher certified product is free from gluten, dairy, preservatives, artificial colours or flavours, and retails in a 200g pack that features the Facebook logo.

Claims:

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

Coles Char Siu Australian Pork Slow Cooked Ribs

Coles Char Siu Australian Pork Slow Cooked Ribs are said to have been slow cooked for a minimum of six hours. This Australian made product contains no artificial colours or flavours, is claimed to be sow stall free, and retails in a 750g recyclable pack featuring a three star Australian Health Star rating.

Claims:

No Additives/Preservatives, Ethical - Environmentally Friendly Package, Ethical - Animal

Source: Mintel (2016)

Sweetpotatoes.

Consumption and purchase both declined this wave.

Consumers continue to purchase sweetpotatoes from mainstream retailers, with a decline in purchase from markets and independent supermarkets over the last three waves.

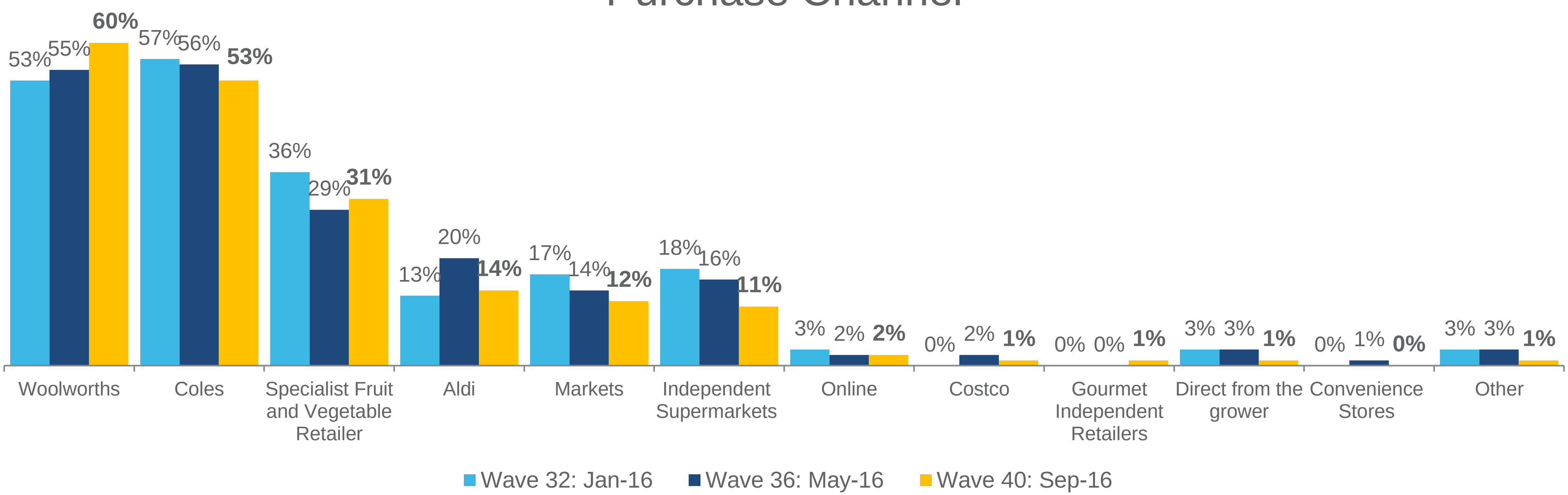
Average Purchase
3.1 times
per month

▲ 3.4 times, Wave 32
▲ 3.6 times, Wave 36

Average Consumption
7.6 times
per month

▲ 7.8 times, Wave 32
▲ 8.3 times, Wave 36

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 32 N=202, Wave 36 N=205, Wave 40 N=201

▼: 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 purchased **1.1kg** of sweetpotatoes in September 2016, which has declined this wave.

▲ 1.2kg, Wave 32
▲ 1.3kg, Wave 36

Recalled last spend

The average recalled last spend for sweetpotatoes was **$3.50**, slightly lower than previous waves.

▲ $3.60, Wave 32
▲ $3.80, Wave 36

Value for money

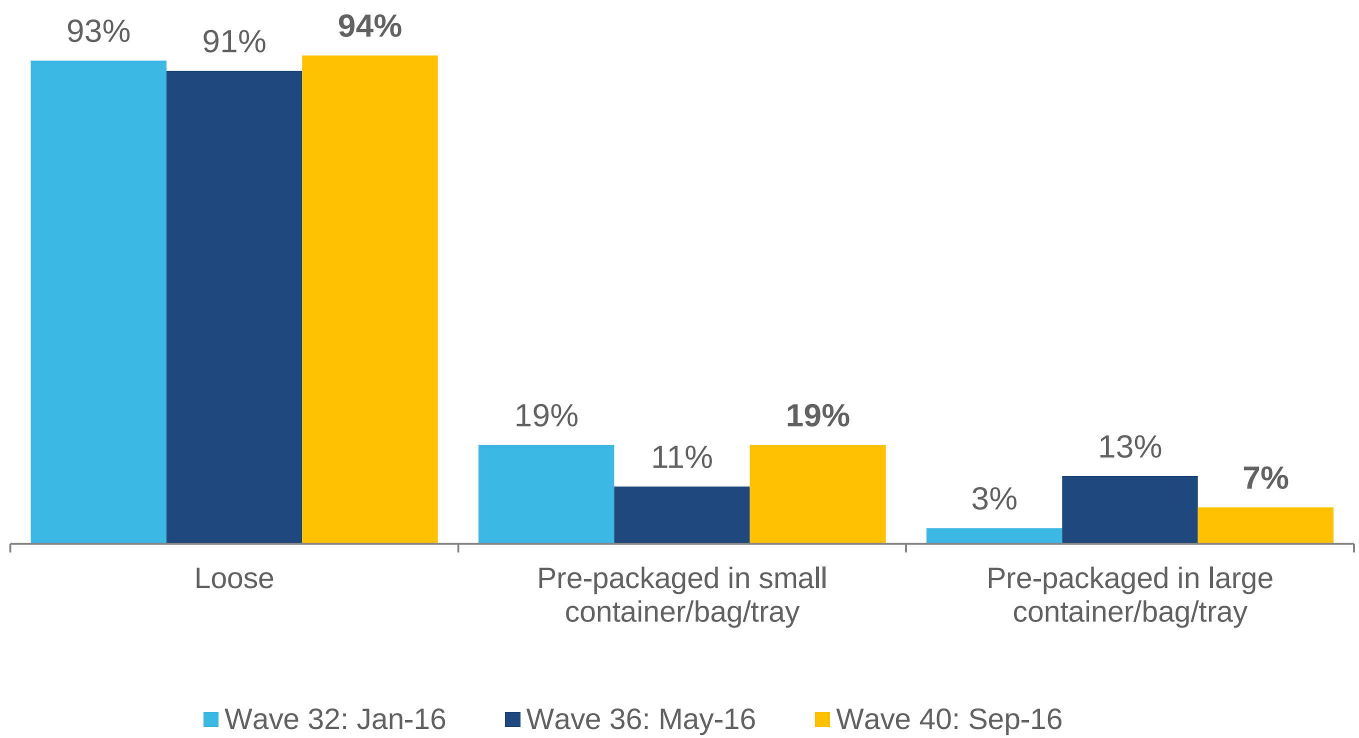
On average, consumers perceived sweetpotatoes to be good value for money **(6.8/10)**, consistent with the previous wave.

▼ 6.5/10, Wave 32
— 6.8/10, Wave 36

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 32 N=202, Wave 36 N=205, Wave 40 N=201

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

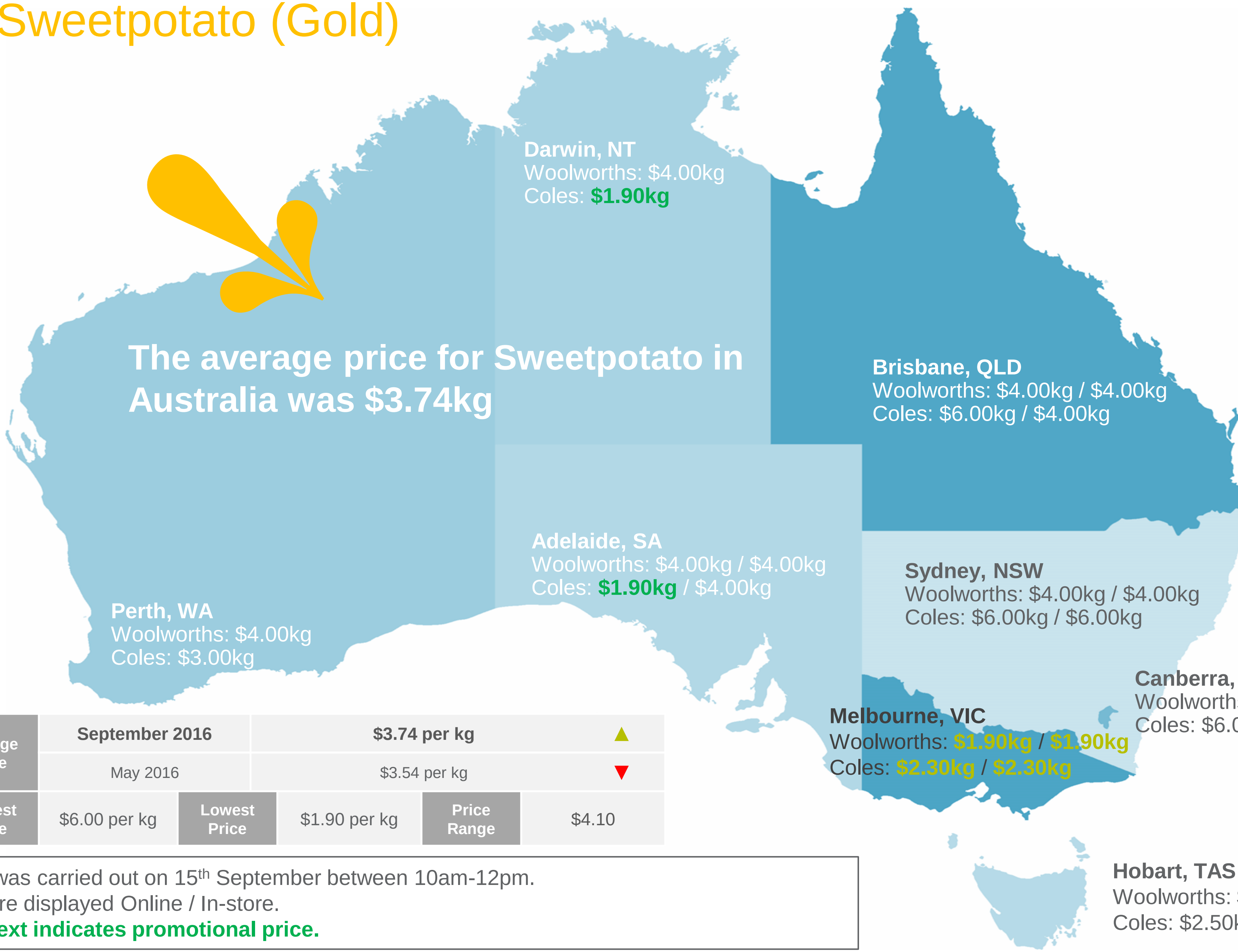
The majority of consumers are purchasing individual sweetpotatoes. This wave sees an increase in purchase of pre-packaged small formats, returning to levels found in Wave 32.



Q4b. In what fresh formats do you typically purchase Sweetpotato?
Sample Wave 32 N=202, Wave 36 N=205, Wave 40 N=201

Online and In-store Commodity Prices

Sweetpotato (Gold)

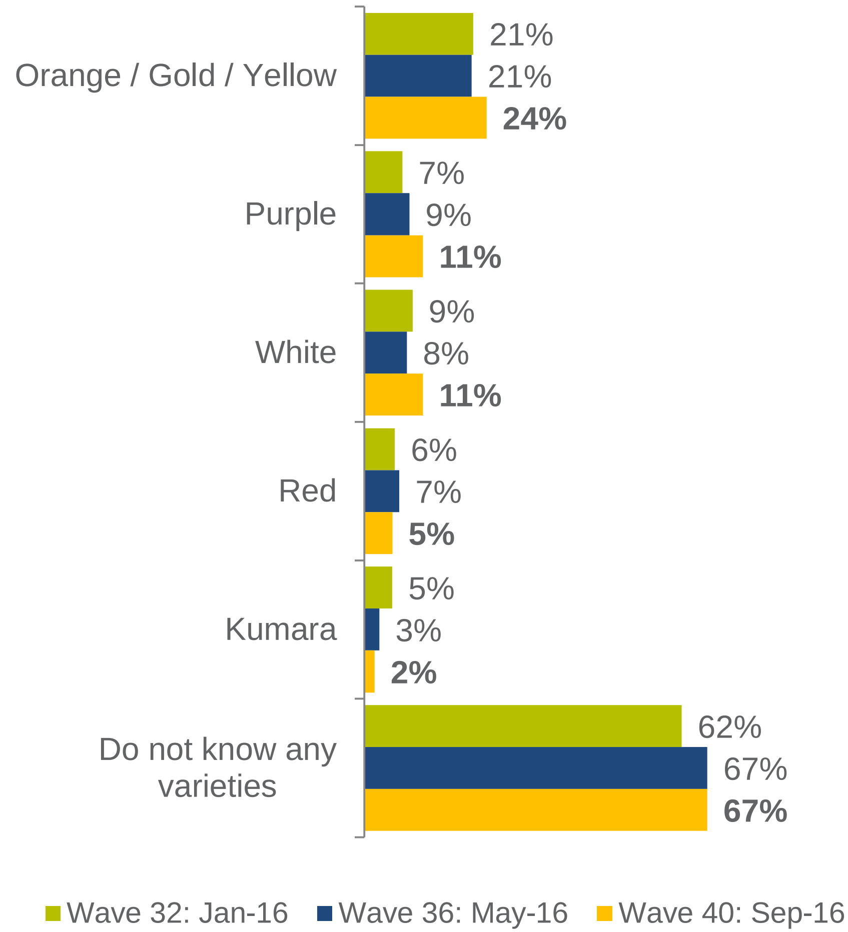


Average Price	**September 2016**	**$3.74 per kg**	▲		
	May 2016	$3.54 per kg	▼		
Highest Price	$6.00 per kg	**Lowest Price**	$1.90 per kg	**Price Range**	$4.10

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

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

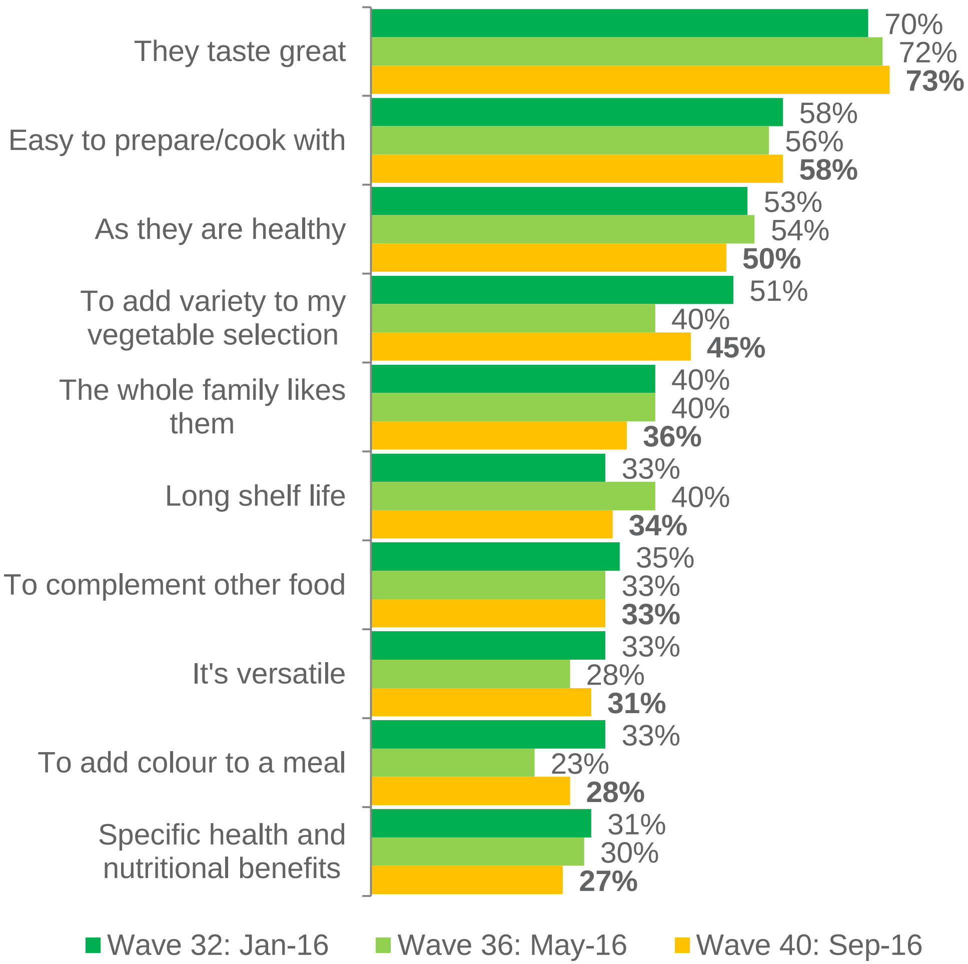
The orange/gold/yellow sweetpotato has the greatest awareness, followed by the purple and white variety.



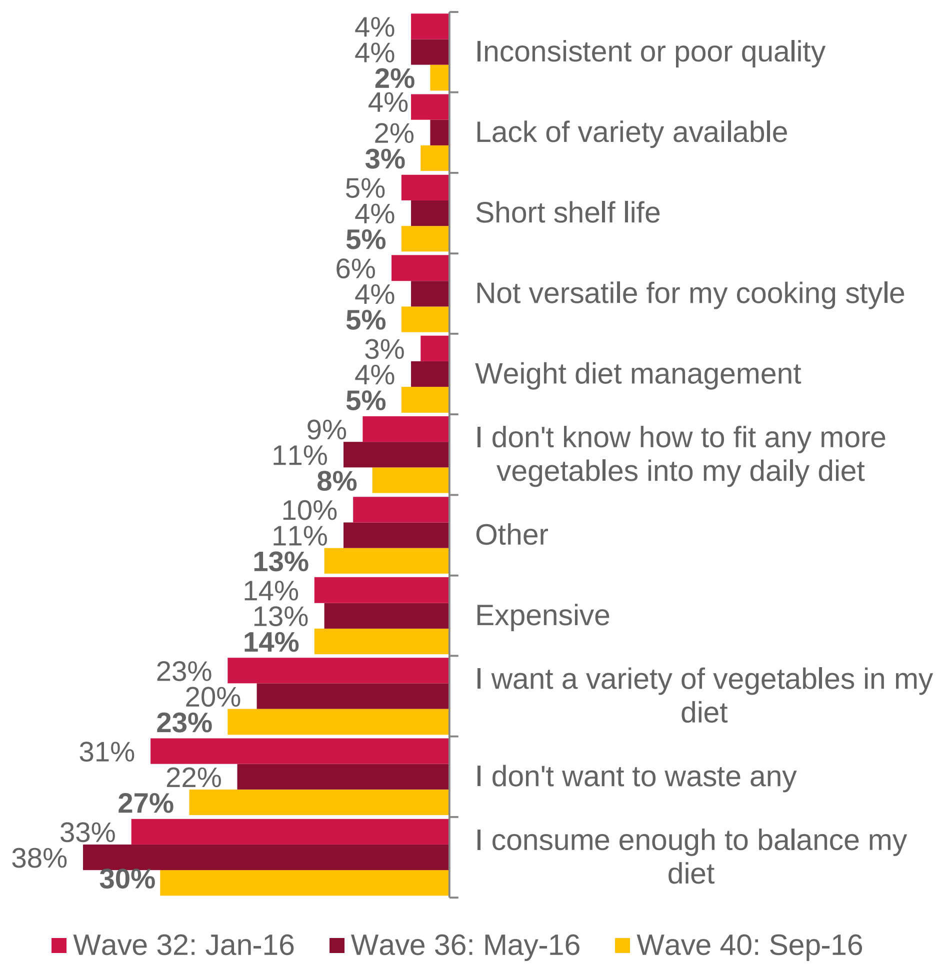
Q6a. What varieties of <commodity> are you aware of? (unprompted)
Sample Wave 32 N=202, Wave 36 N=205, Wave 40 N=201

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

Triggers



Barriers



Q7. Which of the following reasons best describes why you purchase <commodity> ?
Q8. Which reason best describes why you don't buy <commodity> more often?
Sample Wave 32 N=202, Wave 36 N=205, Wave 40 N=201

Sweetpotato cooking remains heavily skewed towards Australian cuisines. This wave sees a noticeable increase in sweetpotatoes being cooked in Indian cuisine.

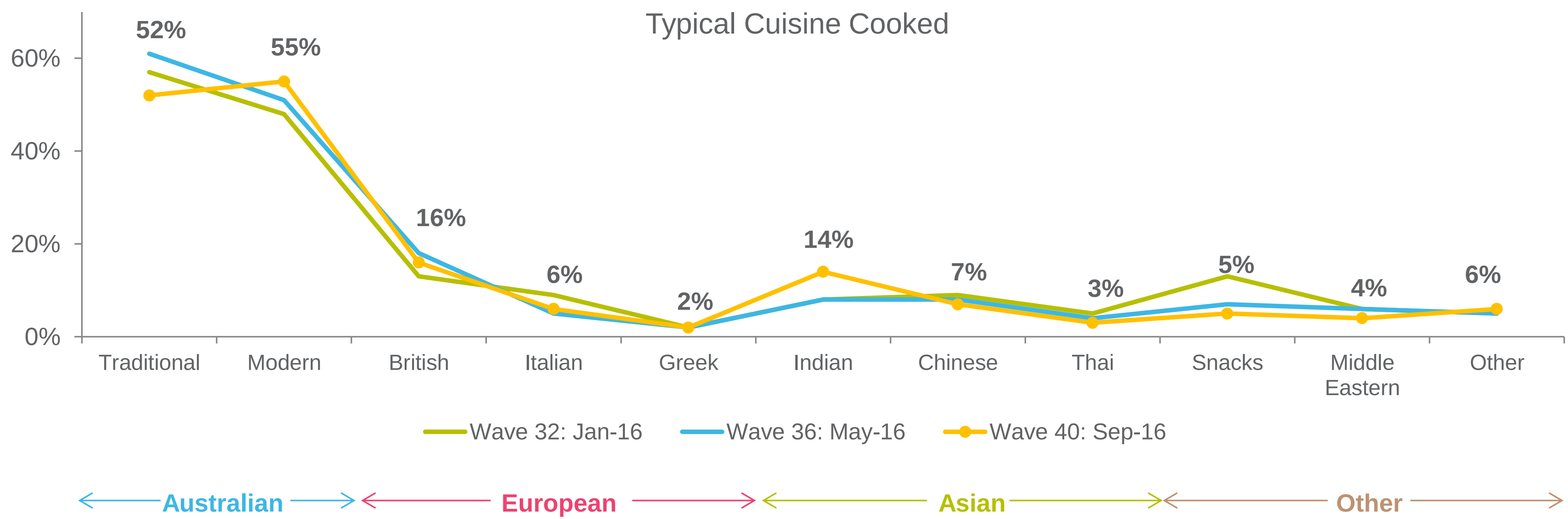
Consumption occasions tend to be based around dinner.

Top 5 Consumption Occasions

	Wave 36	Wave 40
Dinner	72%	**71%**
Family meals	64%	**59%**
Weekday meals	40%	**34%**
Quick Meals	21%	**28%**
Weekend meals	37%	**28%**

10% used sweet-potatoes when cooking a new recipe

10%, Wave 36



Q10. What cuisines do you cook/consume that use <commodity> ?
Q11. Which of the following occasions do you typically consume/use <commodity> ?
Sample Wave 32 N=202, Wave 36 N=205, Wave 40 N=201

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

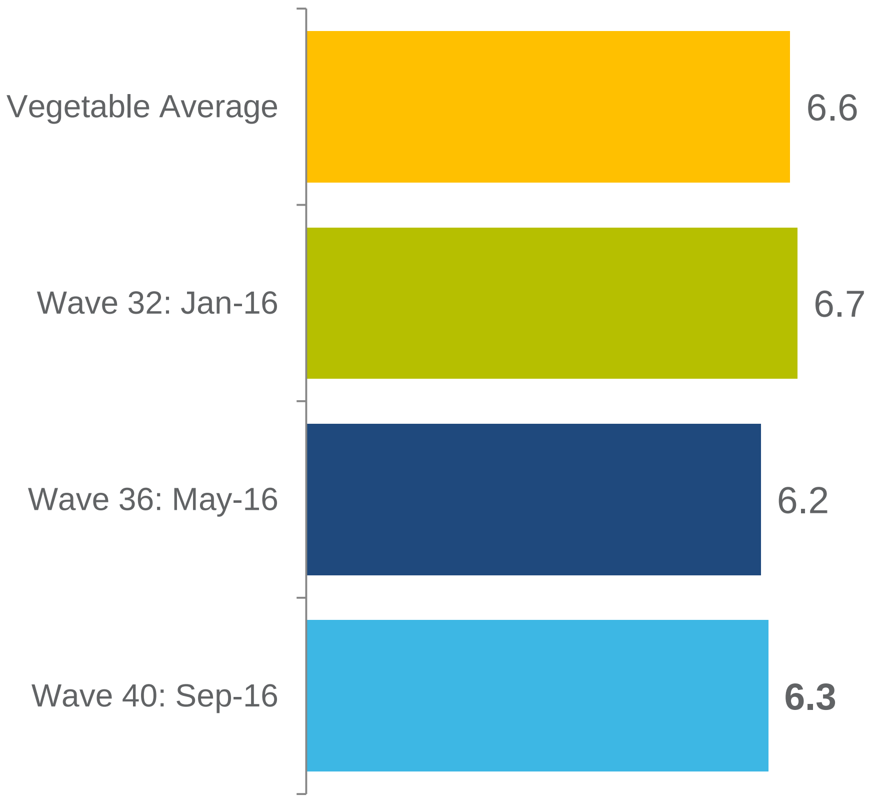
Consistent with previous waves, consumers prefer to roast, bake and mash sweetpotatoes. Sweetpotatoes are generally served with carrots, potatoes and broccoli.

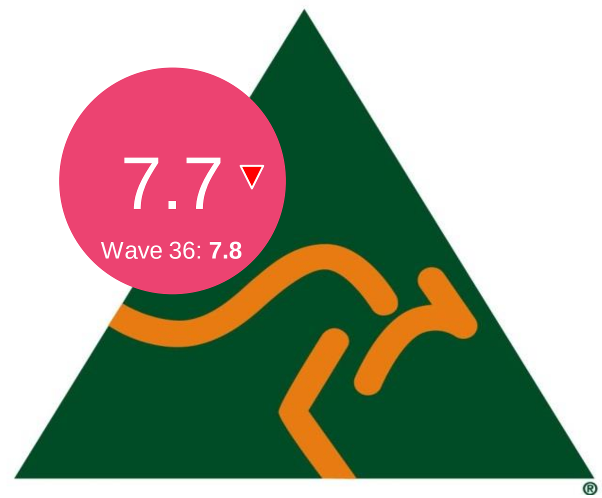
Accompanying Vegetables	
Carrots	53%
Potatoes	51%
Broccoli	38%
Pumpkin	37%
Beans	30%

Top Cooking Styles			
	Wave 32	Wave 36	Wave 40
Roasting	64%	62%	**56%**
Baking	39%	49%	**51%**
Mashing	50%	42%	**45%**
Boiling	32%	33%	**35%**
Steaming	26%	27%	**26%**
Soup	18%	20%	**18%**
Slow Cooking	17%	16%	**17%**
Frying	13%	12%	**14%**
Microwave	20%	15%	**11%**
Stir frying	9%	6%	**8%**

Q9. How do you typically cook <commodity> ?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
Sample Wave 32 N=202, Wave 36 N=205, Wave 40 N=201

Importance of sweetpotato provenance has slightly increased this wave, but still sits below the Vegetable Average.



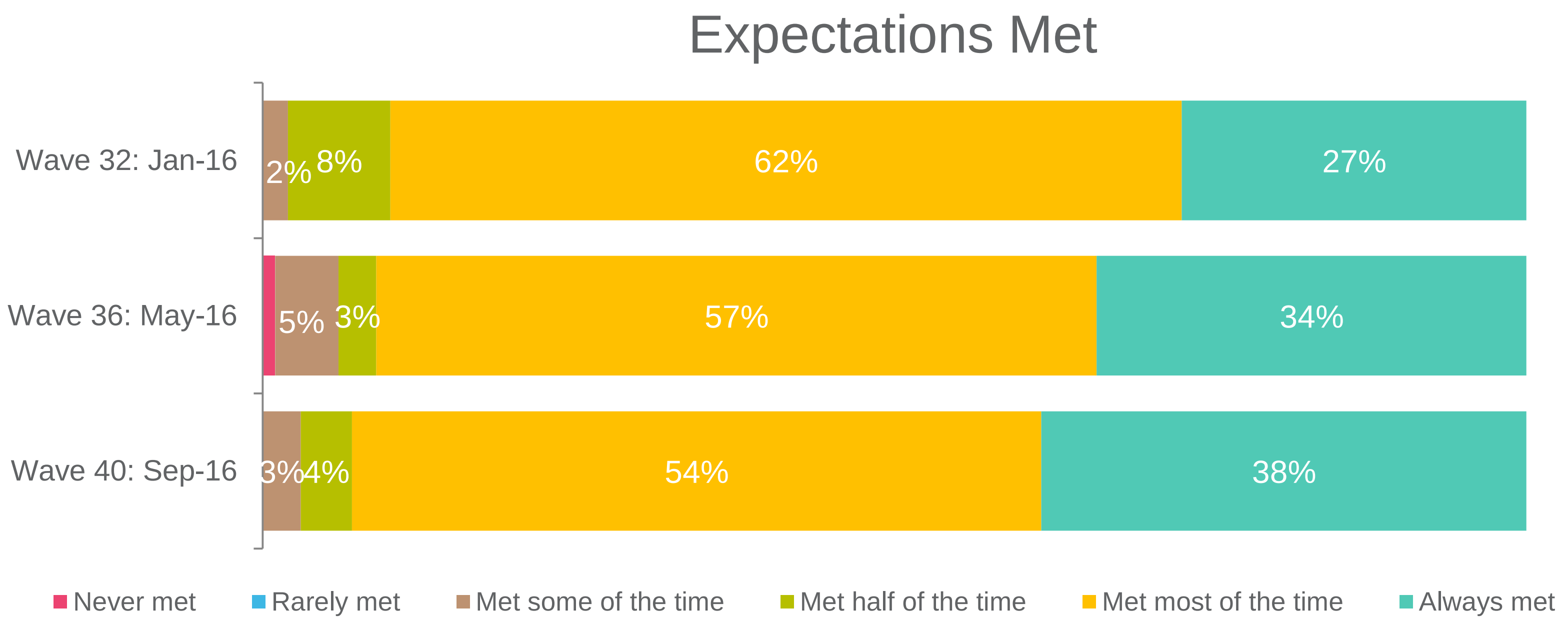


Q14. When purchasing <commodity>, how important is Provenance to you?
Mean scores out of 10.
Sample Wave 32 N=202, Wave 36 N=205, Wave 40 N=201

Sweetpotatoes are expected to stay fresh for two weeks, which has noticeably increased this wave. These expectations are being met at least most of the time, which has consistently improved over the last three waves.

Expected to stay fresh for **14.0** days

▼ 12.5 days, Wave 32
▼ 12.8 days, Wave 36



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 32 N=202, Wave 36 N=205, Wave 40 N=201

Horticulture Innovation Australia

colmar brunton.

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

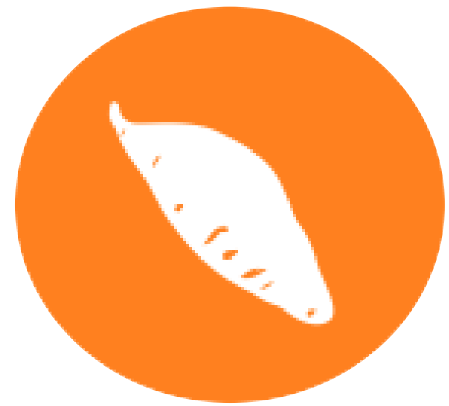
Trends: Sweetpotatoes.

Sweetpotato Global NPDs
June – September 2016

There were 1908 global launches over the past three months that contained Sweetpotato as an ingredient. These were predominantly launched in Europe and Asia Pacific, particularly in USA and Germany. Key categories for launches were skincare, snacks and bakery items.

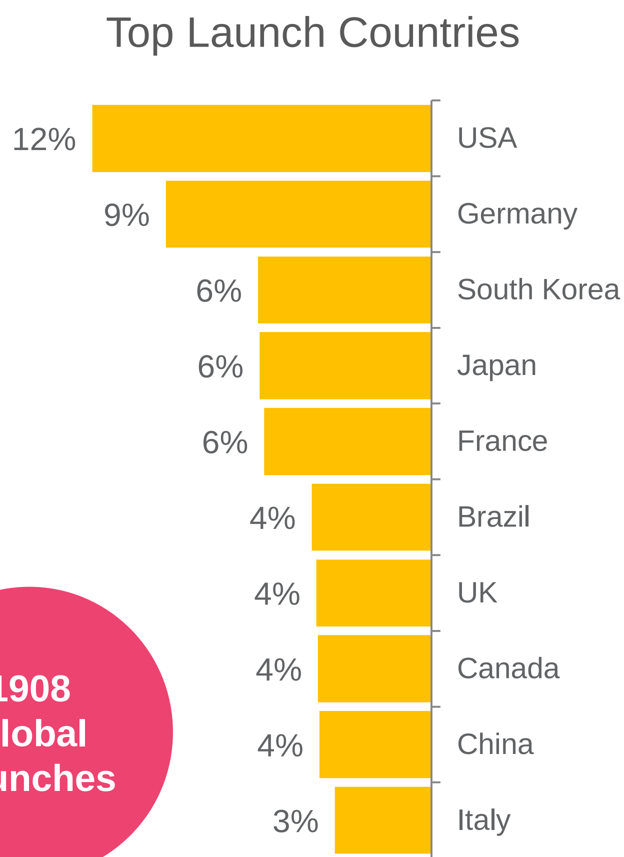
Sweetpotato Product Launches:
Last 3 Months (June – September 2016)
Summary

- There were 1908 global launches over the past three months that contained Sweetpotato as an ingredient, substantially lower than the previous wave (2426).
- There were 34 products launched in Australia over the last three months.
- Products were predominantly launched in Europe (40%) and Asia Pacific (30%).
- The main category launches were skincare (18%), snacks (14%), and bakery items (8%).
- Common pack formats used were flexible packaging (32%), bottles (17%) and tubes (10%).
- Popular claims used on products were botanical/herbal (26%), no additives/preservatives (19%), and moisturising/hydrating (16%).
- The most innovative products launched was a Yam Pudding Instant Mix from the Philippines. Other examples can be found on the following pages.

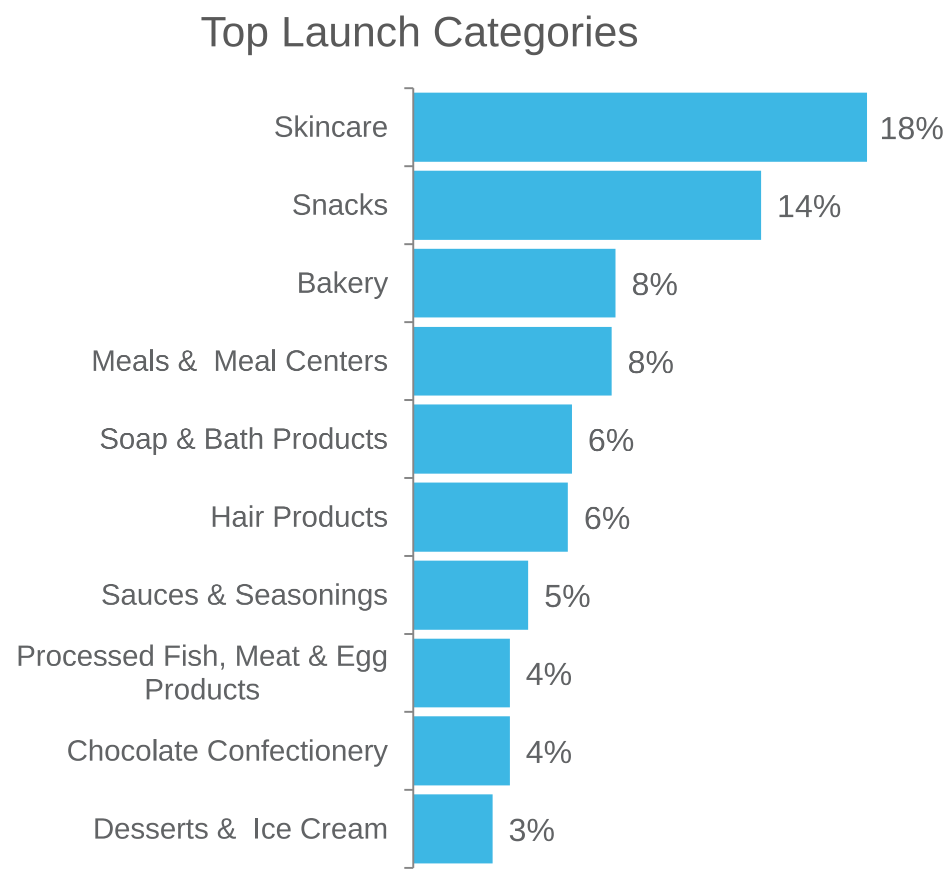


Source: Mintel (2016)

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



1908 Global Launches



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

Pack Formats Used

Global	Flexible	32%
	Bottle	17%
	Tube	10%
Europe	Flexible	30%
	Bottle	18%
	Tube	11%
Asia Pacific	Flexible	36%
	Bottle	15%
	Flexible sachet	8%

Top Claims Used

Global	Botanical/Herbal	26%
	No Additives/Preservatives	19%
	Moisturising / Hydrating	16%
Europe	Botanical/Herbal	31%
	No Additives/Preservatives	18%
	Moisturising / Hydrating	17%
Asia Pacific	No Additives/Preservatives	20%
	Botanical/Herbal	16%
	Microwaveable	15%

Only regions with n >30 are displayed

Innovative Sweetpotato Launches:
L3M (June – September 2016)

Calbee Anno Imo Sweet Potato Chips (Japan)

Calbee Anno Imo Sweet Potato Chips have been relaunched. These thick potato chips are made with anno imo sweet potatoes from Tanegashima for a luxurious sweetness, and are free from added sugar and salt. This product features a crunchy texture, it s only available in Circle K Sunkus and retails in a 20g pack. Launched in May, 2016 with an RRP of 168 yen.

Claims:

Low/No/Reduced Sugar, Low/No/Reduced Sodium

Calbee Satsumaimon Brown Sugar Sweet Potato Chips (Japan)

Calbee Satsumaimon Brown Sugar Sweet Potato Chips has light sweetness of brown sugar and are only available in Hokkaido, Niigata, Nagano, Yamanashi and the Kanto and Tohoku regions. This crispy product retails in a 50g pack. Launched on June 20, 2016. RRP not available.

Claims:

N/A

Peacock Outstanding Sweet Potato Sticks (South Korea)

Peacock Outstanding Sweet Potato Sticks are made of Korean julienne sweet potato and sunflower oil. The product is fried until crispy, is said to feature outstanding quality and taste, and retails in a 50g pack.

Claims:

N/A

Plum Organics Super Puffs Mango with Sweet Potato Organic Grain Cereal Snack (USA)

Plum Organics Super Puffs Mango with Sweet Potato Organic Grain Cereal Snack has been repackaged. The kosher certified product is made with organic grains, fruits and veggies, contains 24mg of choline, seven vitamins and minerals and 2g wholegrain. Perfectly sized for babies, this blend of mango and sweet potato encourages self feeding and easily dissolves in the mouth.

Claims:

Kosher, Organic, Babies & Toddlers (0-4), Wholegrain, Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Ethical - Human, Ethical - Charity, Ease of Use, GMO-Free

Source: Mintel (2016)

Innovative Sweetpotato Launches:
L3M (June – September 2016)

No Brand Purple Sweet Potato Chips (South Korea)

No Brand Purple Sweet Potato Chips are made with purple sweet potato powder and are said to be crispy, salty and sweet. The product is suitable as a snack or accompaniment to beer and retails in a 110g pack.

Claims:
Economy

Dia Sweet Cookies with Sweet Potato Marmalade (Argentina)

Dia Galletitas Dulces Pepas con Mermelada de Batata (Sweet Cookies with Sweet Potato Marmalade) are said to be made with artisanal care. The product retails in a 500g family pack.

Claims:
N/A

Yummy Spoonfuls Sweet Potato, Green Beans & Chicken (USA)

Yummy Spoonfuls Sweet Potato, Green Beans & Chicken is an organic and fully cooked stage three meal suitable for babies aged 12 months and older. The USDA inspected product is free from preservatives, GMO, artificial colors, flavors and sweeteners, gluten, and processed purees and fillers.

Claims:
No Additives/Preservatives, Microwaveable, Organic, Babies & Toddlers (0-4), Gluten-Free, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Package, Ease of Use, GMO-Free, Social Media

Joe Czajkowski Farm Krinkle Cut Sweet Potato Fries (USA)

Joe Czajkowski Krinkle Cut Sweet Potato Fries are now available. The US-grown product is said to be healthy and tasty when roasted in the oven. It retails in a 16-oz. pack.

Claims:
N/A

Source: Mintel (2016)

Innovative Sweetpotato Launches:
L3M (June – September 2016)

BFree Sweet Potato Wraps (UK)

BFree Sweet Potato Wraps are described as delicious and nutritious sweet potato wraps. The microwavable, low fat wrap is suitable for home freezing, and is free from wheat, dairy, egg, nut, soy and gluten. The wrap is made with nutritious ingredients such as pea protein and brown rice flour. It is high in antioxidant vitamin E. This kosher certified product is suitable for vegans and has a high fibre content.

Claims:
Low/No/Reduced Calorie, High/Added Fiber, Kosher, Low/No/Reduced Fat, Microwaveable, Gluten-Free, Antioxidant, Low/No/Reduced Allergen, Vegan, No Animal Ingredients, Social Media

Donnybrook Fair Orzo with Roast Sweet Potato & Feta Cheese Salad (Ireland)

Donnybrook Fair Orzo with Roast Sweet Potato & Feta Cheese Salad is prepared daily using only the freshest, seasonal vegetables. This product is suitable for vegetarians and retails in a 300g pack.

Claims:
Vegetarian

Green Leaves Purple Yam Pudding Instant Mix (Phillipines)

Green Leaves Ube Halaya (Purple Yam Pudding Instant Mix) is easy to prepare and only needs the addition of water. It is microwavable, halal certified and free from preservatives. The premium product retails in a 380g pack that yields up to eight servings, bears a QR code and features serving suggestions.

Claims:
No Additives/Preservatives, Microwaveable, Premium, Halal, Time/Speed, Ease of Use

Bofrost Sweet Potato Soup with Ginger (Germany)

Bofrost Süßkartoffelsuppe mit Ingwer (Sweet Potato Soup with Ginger) has been added to the range. The fine cream soup made from sweet potatoes and refined with ginger can be heated in a pot or in the microwave and retails in a 600g pack featuring a QR code.

Claims:
Microwaveable

Source: Mintel (2016)

Australian Sweetpotato Launches:
L3M (June – September 2016)

Coles Vegetable Mash

Coles Vegetable Mash has been reformulated with a new and improved recipe. The product is made in Australia with Australian potatoes, vegetables, milk, butter and spices, and features a 4.5 health star rating. It retails in newly designed 350g microwavable tub.

Claims:
Microwaveable

Pop Tops Fruit & Veg Sweet Potato, Apple & Tropical Juice Drink

Pop Tops Fruit & Veg Sweet Potato, Apple & Tropical Juice Drink contains one serve of fruit and one serve of veggies. The 99% fruit and vegetable juice contains no sugar, artificial colours, flavours or sweeteners. This product retails in a recyclable pack containing four 250ml units.

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

The Real Skinny Soup Pumpkin & Sweet Potato Soup

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

Claims:
No Additives/Preservatives, Microwaveable, Slimming

Yumi's Sweet Potato & Fresh Ginger Classic Dip

Yumi's Sweet Potato & Fresh Ginger Classic Dip is new to the range. This kosher certified lighter style product is free from dairy and gluten, said to be packed with antioxidants, and retails in a 200g pack.

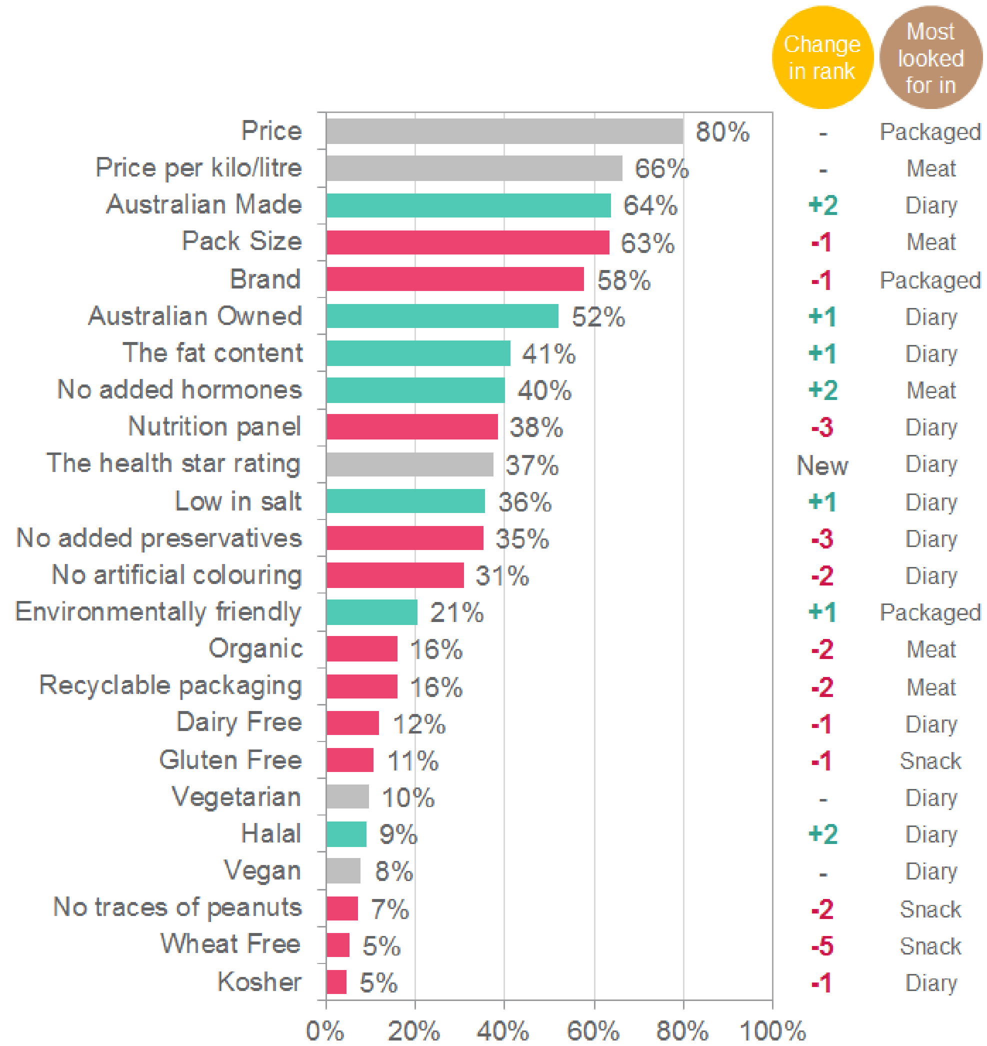
Claims:
Kosher, Gluten-Free, Antioxidant, Low/No/Reduced Allergen

Source: Mintel (2016)

In the Media.

General Vegetable News
(June – September 2016)

- The Australian Made Campaign (AMCL) has welcomed the latest research from Colmar Brunton which reveals ‘Australian made’ has moved to the third most looked for statement on product labels, the first two both being price related.
- AMCL Chief Executive, Ian Harrison says it proves that Australian consumers want to buy genuine Aussie produce.
- “The finding that an ‘Australian made’ claim ranks second behind price factors in the information shoppers are looking for, clearly establishes that shoppers want to know where their food is coming from and where their products are made. Primarily they want to buy Australian made and Australian grown,” Mr Harrison says.
- “The Australian Made, Australian Grown logo provides that immediate connection and gives Australian consumers the confidence and trust that what they are buying is in fact from Australia.”
- Recent changes to country of origin food labelling in Australia will make discovery of provenance much easier for shoppers and will give them a better understanding of how much of their food is sourced locally.



www.freshplaza.com

Horticulture Innovation Australia
colmar brunton.

Commodity News
(June – September 2016)

- A market garden farm on the Sunshine Coast Hinterland has won the latest skirmish in an annual battle with marauding native wood ducks. The birds descended on Shambhala farm at Doonan in July, devouring row after row of leafy green market garden crops.
- "Done my pak choy, my bok choy, my cos, my oak leaf lettuce so I didn't even harvest the oak or the cos, it was a massacre," field manager Mick Warren said at the time.
- But now there is a vastly different story to share. A combination of netting the fields, trapping and relocation has paid off, with not one duck injured in the process. Shambhala farm was also planting crops the ducks turn their bills up at, like ginger, turmeric and corn.

www.abc.net.au

- The packaging industry is being revolutionised with innovative new ideas and strong growth, especially in the snacking vegetable sector.
- "There is a big gap in market place now," explains Gilad Sadan. "Farmers can no longer be 'just farmers' in the traditional sense, they need to be more forward thinking, need to invest in machinery, new packhouse automation equipment and innovation to find new ways to sell their produce and engage the customers."
- Snacks such as 'snacking' tomatoes, mini cucumbers and mini capsicums in pre-packaged trays are increasing in popularity due to convenience, quality and minimising wastage.

www.freshplaza.com

- Thanks to extraordinary nutritional benefits, the Brussels sprout is undergoing an image makeover, sending sales at Sainsbury's soaring this summer. The industry is worth approximately £650,000,000 and Britain consumes more Brussels sprouts than any country in Europe.
- Discerning shoppers looking for the healthiest produce have driven sales up 43 per cent this summer. This unprecedented rise follows recent research published by the New Scientist heralding sprouts as a richer source of many nutrients than foodie-favourite – kale.
- Last year, an estimated 700 tonnes of sprouts were harvested for Sainsbury's in the run up to Christmas.

www.express.co.uk

- Australian tea brand T2 has created a range of vegetable teas, using ingredients like beetroot and broccoli.
- The four new teas can be consumed hot, or added into juices and smoothies to be served cold. They will be "unique to the UK market".
- The range of new flavours consists of rooibos, beetroot and broccoli; carrot, ginger and turmeric; green tea and spinach; and apple, kale and ginger. All of the teas are 100% organic, vegan, vegetarian and gluten-free, and will be available in store and online from today until 2 October.

www.foodbev.com

Commodity News
(June – September 2016)

- Tonnes of perfectly good food are thrown away in the UK every year. Celebrity chef, Hugh Fearnley-Whittingstall watched on as 20 tonnes of freshly dug parsnips were consigned to the rubbish heap in a Norfolk farmyard - purely because they didn't look pretty enough. This was enough to fill nearly 300 shopping trolleys and feed 100,000 people with a generous portion of roast parsnips.
- That was just one week's wastage. So multiply by the 40 or so weeks of parsnip season (September-May) to get the full annual figure - four million parsnip portions that could, but won't, get eaten. Depending on the growing conditions, this wastage is between 30 and 40% of Tattersett Farm's crop of prime roots.

www.bbc.com

- Tomato sauce is a staple in homes the length and breadth of Britain. But recent figures show sauce sales have fallen by four per cent this year. According to consumer analysts, spicier alternatives have seen sales rise by 7.5 per cent. This includes increasingly popular sauces such as tomato & mustard sauce, beetroot sauce and a chilli tomato sauce.
- The beetroot sauce contains no actual tomatoes, and is said to have a fresh and earthy flavour. The makers say it is ‘good with everything’ and harnesses the naturally sweet flavours of beetroot and apple.

www.dailymail.co.uk

- Pumpkin beers are the best-selling seasonal beer in the United States, but sweet potato beers are gaining ground as an autumnal alternative.
- Birdsong Brewing in Charlotte cuts by hand 320 pounds of sweet potatoes for each batch of St. Tuber Abbey Ale, which it has brewed since 2012. The beer is brewed with cloves and fermented with a Belgian yeast.

www.charlotteobserver.com/

Project Harvest Background & Methodology.

Background & Setting the Scene.

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

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

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

This wave's report (Wave 40, September 2016) focuses on:

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

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

Horticulture Innovation Australia

colmar brunton.

Online Methodology.

- Respondents are recruited via an Online Panel. If the respondents meet the recruitment requirements of sufficient vegetable consumption (monthly) they are asked to complete the online questionnaire.
- All respondents complete general demographic and consumption questions. If respondents purchased any of the specific commodities within the last month they then complete those questions. A minimum of N=200 respondents per commodity completed the questionnaire.
- Topics covered in the questionnaire are vegetable purchase and consumption, category health, price and value perceptions, triggers and barriers to purchase and preparation and cooking preferences.
- An additional 2 ad-hoc questions are asked at the end of the questionnaire. The subjects of these questions are supplied by Horticulture Innovation Australia prior to each month to get feedback on topics of interest at that time.
- The questionnaire takes 15 minutes to complete.
- Questions asked appear on the bottom of each page of this report. Unless stated otherwise, all scales were 0 -10 scales, with higher scores indicating greater agreement/liking/importance etc.

General Respondent Questions

- Demographics
- Vegetable Consumption

1/7 Commodities

Commodity Specific Questions

- Category Health
- Purchase & Consumption Habits
- Price Perceptions & Average Spend
- Triggers/Barriers to Purchase
- Preparation Preferences

+ 2 Ad hoc Questions per Month

Sample.

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

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

To qualify for the questionnaire, respondents...

- ⇛ Were aged 18 years and over
- ⇛ Purchased fresh vegetables at least once a month
- ⇛ Purchased at least one of the monthly commodities (Asian Vegetables, Capsicum, Brussels Sprouts, Spinach, Parsnip, Beetroot and Sweetpotatoes) within the last month
- ⇛ Were the main or joint grocery buyer.

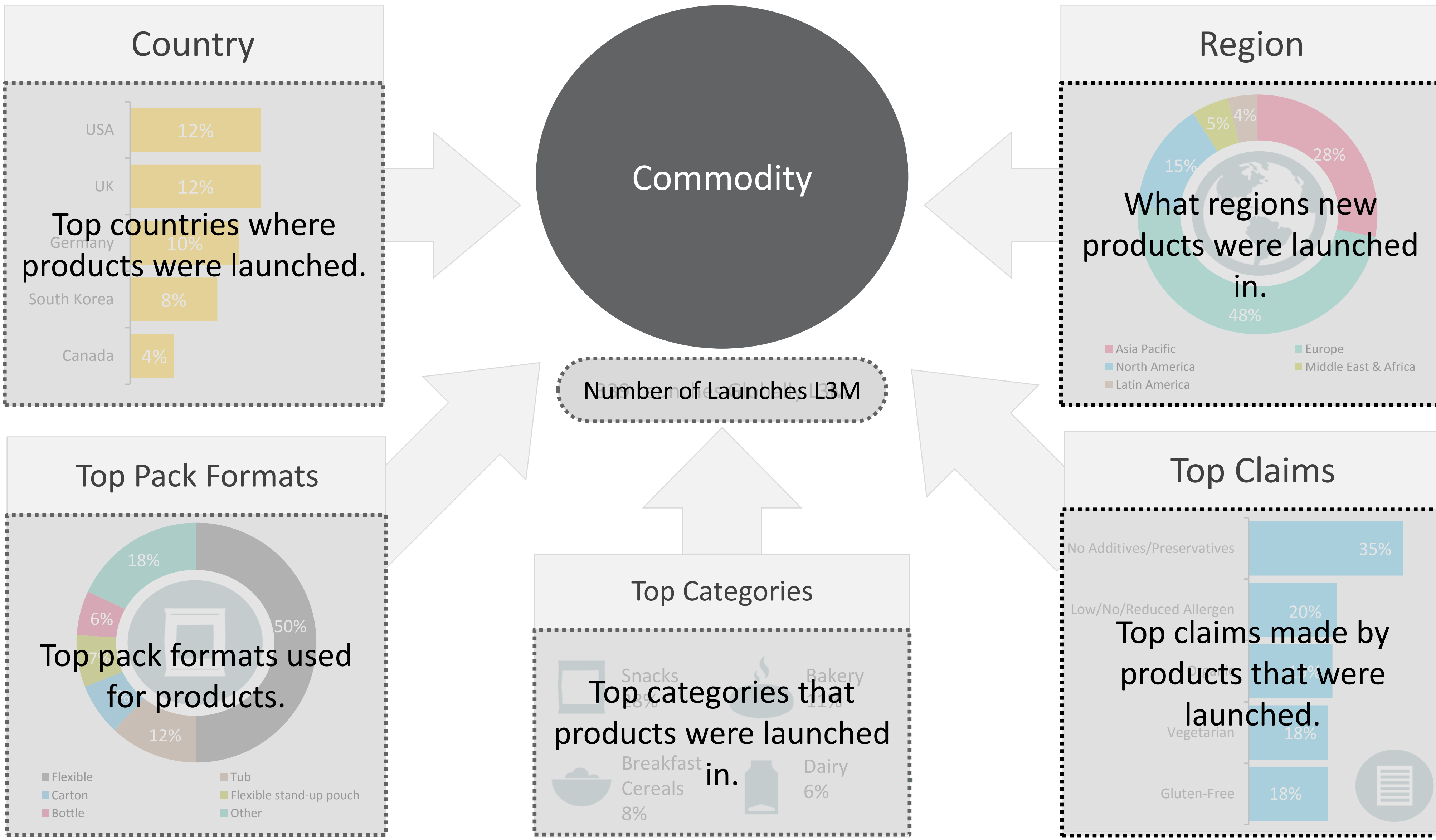
	Asian Vegetables n=306	Capsicum n=302	Brussels Sprouts n=302	Spinach n=303	Parsnip n=201	Beetroot n=202	Sweetpotatoes n=201
Gender							
Male	36%	39%	47%	34%	35%	43%	32%
Female	64%	61%	53%	66%	65%	57%	68%
Age							
18-24 y.o.	3%	1%	1%	2%	1%	1%	3%
25-34 y.o.	19%	13%	11%	20%	6%	18%	13%
35-44 y.o.	15%	16%	12%	21%	10%	17%	22%
45-54 y.o.	17%	13%	13%	16%	14%	19%	18%
55-64 y.o.	20%	24%	23%	20%	34%	23%	27%
65+ y.o.	25%	34%	41%	21%	34%	21%	17%
Household							
Single Income no Kids	19%	20%	18%	20%	19%	20%	21%
Double Income no Kids	20%	19%	22%	18%	12%	18%	14%
Young Families	13%	8%	7%	18%	8%	16%	14%
Established Families	22%	23%	16%	23%	18%	19%	26%
Empty Nesters	26%	30%	38%	21%	42%	27%	24%
Location							
New South Wales	25%	24%	17%	23%	18%	22%	24%
Victoria	19%	23%	23%	19%	24%	22%	17%
South Australia	14%	15%	19%	16%	15%	7%	15%
Queensland	20%	17%	17%	18%	13%	21%	23%
Western Australia	16%	17%	15%	17%	16%	19%	12%
Tasmania	3%	3%	8%	3%	9%	6%	5%
Australian Capital Territory	3%	2%	2%	4%	3%	1%	2%
Northern Territory	1%	0%	0%	0%	0%	0%	1%

Trends Research: Our Approach

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

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

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



Thanks.