Project Harvest Monthly Tracker Report.

Wave 41, October 2016

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

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

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Executive Summary

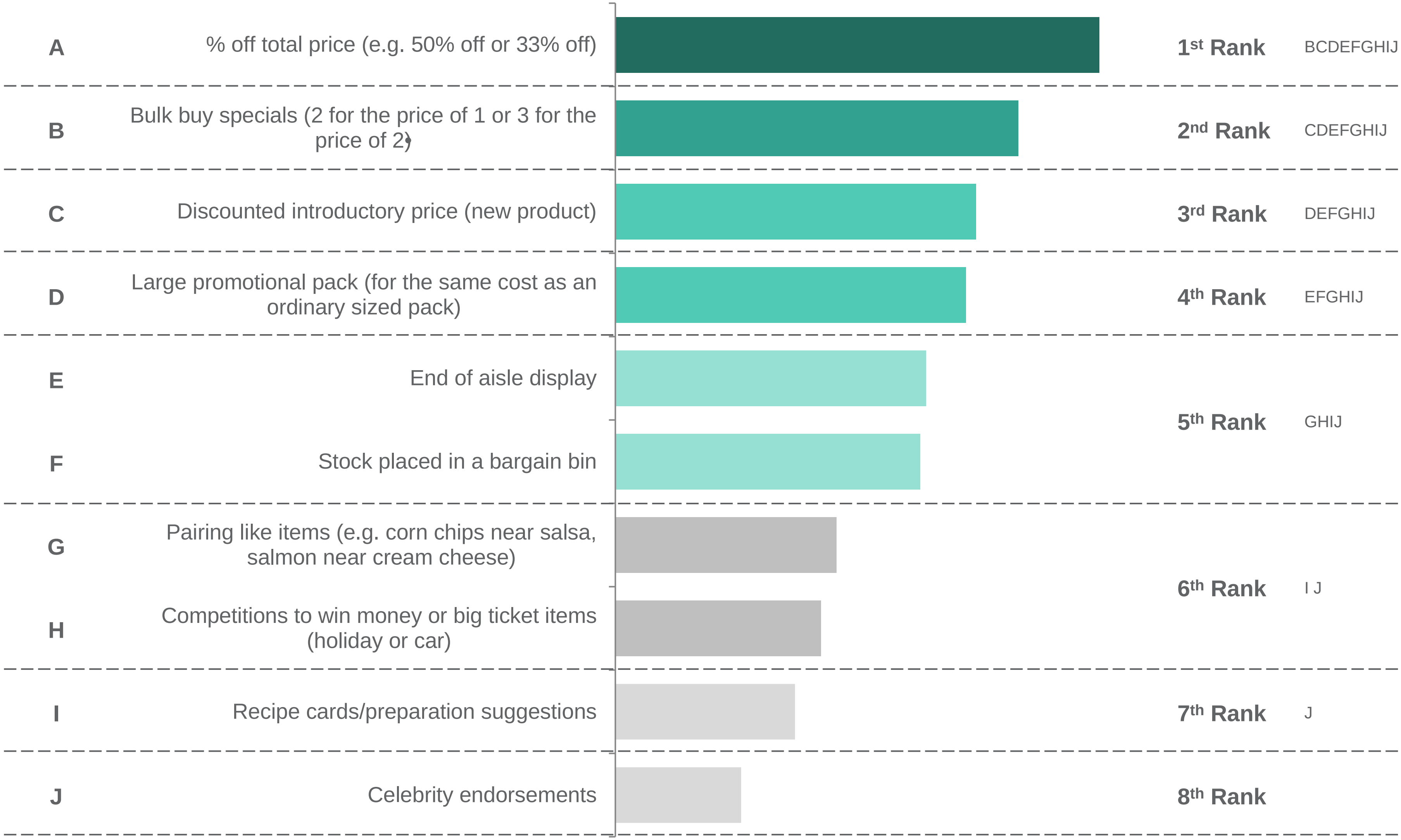
Industry Insight.

Recent Australian research by LiveLighter (October, 2016), revealed that although most people go to the shops with healthy intentions (e.g. 65% pre-planning meals, 51% comparing products in store to see which is healthier), 60% are likely to buy unhealthy food and drinks when they are on sale or promotion. From a health perspective, we thought it would be interesting to understand the appeal for various promotion strategies and reflect on what we typically see in the vegetable industry in comparison.

In order to do so, we surveyed over 1000 Australians nation-wide and asked them which promotions encourage them to purchase food or beverage products.

We found the most enticing promotions were those that clearly save the consumer money, e.g. % off total price, 2 for 1 bulk deals, discounted introductory prices or larger promotional packs. The position of the product in store was only a moderate driver of purchase behaviour, with competitions, recipe cards and celebrity endorsements coming in as having least impact.

Industry Insight cont.



Q. Thinking about what promotions encourage you to buy food or beverage products, can you rank these in order of what encourages you most?
Base: Total Sample N=1008
**Letters indicate significant difference @ 95% CI*

colmar brunton.

Industry Insight cont.

This information could be vital in the conversations between suppliers and retailers in terms of which strategies will best drive sales. Endorsements may help with awareness. Recipe suggestions may help with confidence and familiarity. But clever pricing can drive sales!

However, pricing needs context. Sales or discounts without reason may be perceived by consumers as a way of selling vegetables past their peak, and sale prices without comparison to the usual price may not be as obviously attractive. For example, instead of *"Sale! $4.99 a kilo"*, labels like *"Introductory half price of $4.99/kg"* or *"$33% Off! Start of Season Sale $4.99/kg"*, or *"Not $4.99/kg…. now 2kg's for $4.99!"* may be more effective.

Learning from the wider food and beverage category, such techniques could start to better benefit vegetable sales and the health of Australians as a result.

Beans Grower Action Plan.

Wave 41 Fast Facts – Beans

- Beans have a strong level of importance, endorsement and interest, sitting just above the Vegetable Average.
- Beans are purchased around 4 times per month and are consumed 9 times per month, both slightly higher than the previous wave.
- Consumers purchase 650g of beans per shop. Recalled last spend is $3.50. Overall, consumers perceive beans to be good value for money (6.5/10).
- National price tracking indicated the average price for green beans in October was $6.88 per kg.
- Awareness of bean types increased for several varieties this wave. Broad remained the most recalled type, followed by Green and Runner.
- Beans are expected to stay fresh for just over a week, and freshness expectations are met most of the time.
- Health and taste are the main influences on purchase of beans. Already consuming enough and not wanting to waste any are the primary barriers to purchase.

67% of new products launched over the last three months containing green beans were from the Asia Pacific region.

1.

Insight:

Overall purchase and consumption increased this month, with green beans perceived as good value for money.

Short Term Recommendation:

Ensure widespread availability of fresh, high quality produce. This will help to increase satisfaction levels of green beans, which are currently in line with the Vegetable Average.

2.

Insight:

There was only one product launched containing green beans in Australia over the last three months.

Long Term Recommendation:

With high interest in new varieties of green beans, investigate opportunities for New Product Development (NPD) in Australia that promote health, taste and ease of preparation which are the driving factors why consumers purchase the vegetable.

Carrot Grower Action Plan.

Wave 41 Fast Facts – Carrots

- Importance of carrots was low again this month; however, consumers are satisfied with the range available.
- Carrots are purchased approximately 4 times per month. Consumption of carrot occurs 15 occasions per month, around once every two days.
- On average, consumers purchase 1.1kg of carrot. Recalled last spend was $2.40. Consumers perceived carrots to be very good value for money (7.7/10).
- National price tracking indicated the average price for carrots in October was $2.31 per kg, which was reasonably consistent between state and retailers.
- Awareness of carrot types remains low, with over two-thirds (70%) of consumers unable to recall a type of carrot. Colour is the main trigger for unprompted carrot variety awareness.
- Carrots are expected to remain fresh for approximately 13 days with these expectations increasingly being met all of the time.
- Taste and health are the key triggers to purchase. The main barrier to future purchase is already consuming enough to balance their diet.

44% of consumers purchase carrots due to tradition/habit.

1.

Insight:

Approximately one fifth of consumers use carrots when cooking a new recipe.

Short Term Recommendation:

Provide new recipe ideas on pack or at point of sale that sit outside of Australian cuisine. Focus on ease of preparation as this is a primary reason for purchase.

Look to bundle carrots with other popular vegetables to help prompt recipe ideas with consumers, such as buk choy for stir-frys and potatoes for curries.

2.

Insight:

There has been a significant increase in purchase of individual carrots this wave, which overtakes pre-packaged small bags as the primary format purchased.

Long Term Recommendation:

Limit the decline in pre-packaged carrots by investigating the cause of the shift in purchase. This may be due to pre-packaged bags containing too many carrots to use within shelf life, individual carrots tending to be larger than those in pre-packaged bags or varying quality etc. Understanding the cause shift can help the category better meet consumer needs.

Cauliflower Grower Action Plan.

Wave 41 Fast Facts – Cauliflower

- Cauliflower holds low importance to consumers and there is little interest in new varieties. The majority of consumers indicate that their purchase of cauliflower will remain stable in the future.
- Purchase of cauliflower occurs approximately 4 times per month and is consumed 8 times per month. Purchase is typically from mainstream retailers.
- Overall, cauliflower is perceived to be good value for money (6.6/10). Consumers on average purchase 1.0kg, with recalled last spend at $3.70.
- Price tracking for October 2016 revealed an average price of $4.43 each, relatively consistent with June 2016 ($4.69 each).
- Spontaneous recall remains very low for cauliflower, with approximately three quarters of consumers unable to name a type.
- Ease of preparation and taste are the strongest triggers to purchase, while already consuming enough and not wanting to waste any are the two biggest barriers.
- Consumers expect cauliflower to remain fresh for nine days, with expectations of freshness increasingly being met all of the time.

6.6/10 consumers perceive cauliflower to be good value for money.

1.

Insight:

Cauliflower is increasingly perceived to be good value for money, with consumers appreciating its ease of preparation, taste and quick cooking time.

Short Term Recommendation:

To facilitate strong sales throughout summer, provide recipe ideas at point of sale. Recipes should focus on incorporating cauliflower into seasonal recipes such as salads, couscous, and barbecue cauliflower steaks.

Ensure prepacked options are available to appeal to consumers lacking time.

2.

Insight:

Cauliflower is commonly in the top 5 accompanying vegetables served with the other commodities tracked.

Long Term Recommendation:

Highlight cauliflower's versatility in any dish, complementing all vegetables. Look towards global New Product Development (NPD) trends that utilise cauliflower as a rice replacement. Ground cauliflower can be used to make pizza bases, taco shells, cakes and biscuits.

Pumpkin Grower Action Plan.

Wave 41 Fast Facts – Pumpkin

- Consumers are satisfied with the range of pumpkin available, and overall it has high levels of consumer sentiment.
- Purchase and consumption frequency of pumpkin remained relatively consistent with the previous wave, with approximately 9 consumption occasions per month. Purchase is mainly from mainstream and specialist retailers.
- Consumers on average are purchasing 1.4kg of pumpkin. Recalled last spend is $3.10.
- Price tracking revealed a national average of $2.49 per kg for butternut pumpkins, lower than prices recorded in June 2016 ($3.37 per kg).
- Awareness of pumpkin remains high, with high recall across multiple types of pumpkin.
- Taste and ease of preparation are the key influences to purchase. Barriers to purchase include already consuming enough to balance their diet and not wanting to waste any.
- Consumers expect pumpkin to remain fresh for approximately 12 days once purchased. These expectations are being met most of the time.

24 new product launches in Australia over the last three months.

1.

Insight:

Over a third of consumers are limiting their purchase of pumpkin due to fear of wastage.

Short Term Recommendation:

Educate consumers on the “store and thaw” method of preparation. Leftover pumpkin, fresh or cooked, can easily be frozen and later thawed for later use.

2.

Insight:

There is increased spend on Halloween related products in Australia.

Long Term Recommendation:

Investigate the potential opportunity to grow and supply retailers with Halloween pumpkins. Demand through a mainstream retailer was expected to reach 270 tonnes in the lead up to the event in 2016.

Baby Broccoli Grower Action Plan.

Wave 41 Fast Facts – Baby Broccoli

- There is a high level of endorsement for baby broccoli, with consumers likely to recommend to family and friends. Consumers are also satisfied with the range of baby broccoli available.
- Purchase of baby broccoli occurs around 4 times per month and it is consumed 7 times per month, both increasing this wave. Purchase is typically from mainstream retailers.
- Consumers on average purchase 0.6kg, typically bunched. Recalled last spend is $3.80.
- Price tracking revealed an average price of $2.56 per bunch, consistent with the previous wave.
- Health, ease of preparation and taste are the strongest triggers to purchase, price and wanting a variety of vegetables in their diet are the two biggest barriers.
- Consumers' expectations of freshness are being met most of the time, which has marginally declined this wave.

7.1 is the average number of times baby broccoli is consumed per month.

1.

Insight:

Less than two in five Australian consumers purchased baby broccoli in October.

Short Term Recommendation:

To encourage greater awareness and trial, consider replacing bulk buy specials (e.g. 2 for $5.00) with % off total price deals. For new consumers to trial this commodity, the promotion provides a minimal risk purchase.

Supplying retailers with loose formats or smaller bunches will also increase the likelihood of trial.

2.

Insight:

Short shelf life is increasing as a barrier to purchase, with expectations of freshness less likely to be met all of the time.

Long Term Recommendation:

Communicate positive freshness associations with baby broccoli by providing consumers with best before dates where possible to help manage freshness expectations. Additionally, investigate new packaging and transport options across the supply chain. New technologies that can increase freshness and shelf life will help shift consumer perceptions.

Silverbeet Grower Action Plan.

Wave 41 Fast Facts – Silverbeet

- Consumers are satisfied with silverbeet, in line with the Vegetable Average. One fifth of consumers indicated that they will purchase more in the future.
- Purchase of silverbeet occurs around 3 times per month and is consumed 7 times per month. Purchase is typically from mainstream retailers and also specialist retailers.
- Consumers on average are purchasing 0.8kg of silverbeet. Recalled last spend is $4.00, with consumers perceiving silverbeet to be good value for money (6.6/10).
- Price tracking for October 2016 showed the national average as $3.75 per bunch for silverbeet, consistent with the previous wave.
- Spontaneous awareness for silverbeet is low, with the highest recall for rainbow/coloured/Swiss silverbeet.
- Ease of preparation, health and taste are the key influences to purchase. Barriers to purchase include not wanting to waste any and already consuming enough for their needs.
- Consumers expect silverbeet to remain fresh for approximately a week once purchased, and these expectations are generally met.

51% of consumers cook silverbeet in traditional Australian cuisine.

1.

Insight:

Australian provenance is an important piece of information for consumers.

Short Term Recommendation:

Ensure Australian grown is clearly labelled at point of purchase. This will help strengthen quality and freshness perceptions.

2.

Insight:

Silverbeet holds high future purchase intent, yet there is a lack of variability in cuisines and cooking styles.

Long Term Recommendation:

Encourage a greater range of cooking styles by providing consumers with recipe ideas and methods at point of sale such as silverbeet, baby broccoli and mozzarella pizza.

Parsley Grower Action Plan.

Wave 41 Fast Facts – Parsley

- Parsley has strong levels of consumer sentiment across all metrics of importance, satisfaction, endorsement and interest in new varieties, consistent with the previous wave.
- Purchase of parsley occurs approximately 4 times per month, and it is consumed 11 times per month. Purchase is typically from mainstream retailers.
- Consumers on average purchase 0.3kg, (typically, one bunch). Recalled last spend is $3.00.
- Price tracking revealed an average price of $2.97 per bunch in October 2016, relatively consistent with previous waves.
- Over two thirds of consumers are able to recall a type of parsley, with highest recall for Flat Leaf/Italian/Continental and Curly Leaf Parsley.
- Use as an ingredient in dishes and complementing other food are the strongest triggers to purchase, while growing their own and short shelf life are the two biggest barriers.
- Consumers expect parsley to remain fresh for just over a week. Expectations of freshness are met most of the time.

71% of consumers are able to recall Flat Leaf/ Italian/Continental as a variety of Parsley.

1.

Insight:

There has been a 37 percent rise in sales of parsley in Britain this year (according to Vitacress). Yotam Ottolenghi, a food writer known for his Middle Eastern recipes is credited for helping to fuel the rise in sales.

Short Term Recommendation:

Similarly in Australia, this wave sees an increase in purchase occasions. Look to provide Middle Eastern recipes on pack or at point of sale. Consumers intend to cook more of this cuisine in the future (see Wave 41 ad hoc questions), which typically utilises more parsley within theses dishes.

2.

Insight:

Parsley is least likely to meet consumer freshness expectations (30% of the time), lowest out of all commodities tracked.

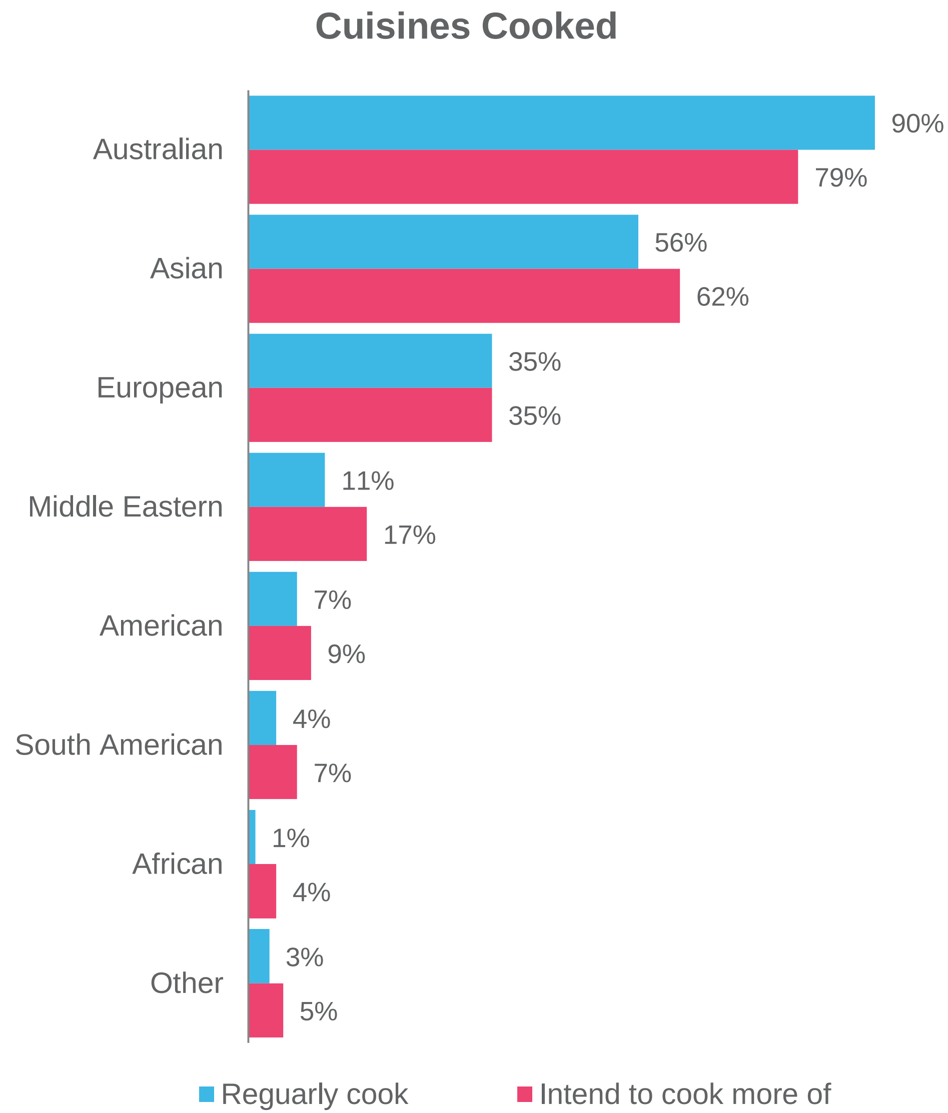
Long Term Recommendation:

With short shelf life as one of the primary barriers to purchase, there is a growing perception that parsley will not remain fresh once purchased. Coming into warmer months, it is important to provide consumers with correct storage instructions i.e. cool storage options.

Wave 41:
Response to Ad hoc Questions

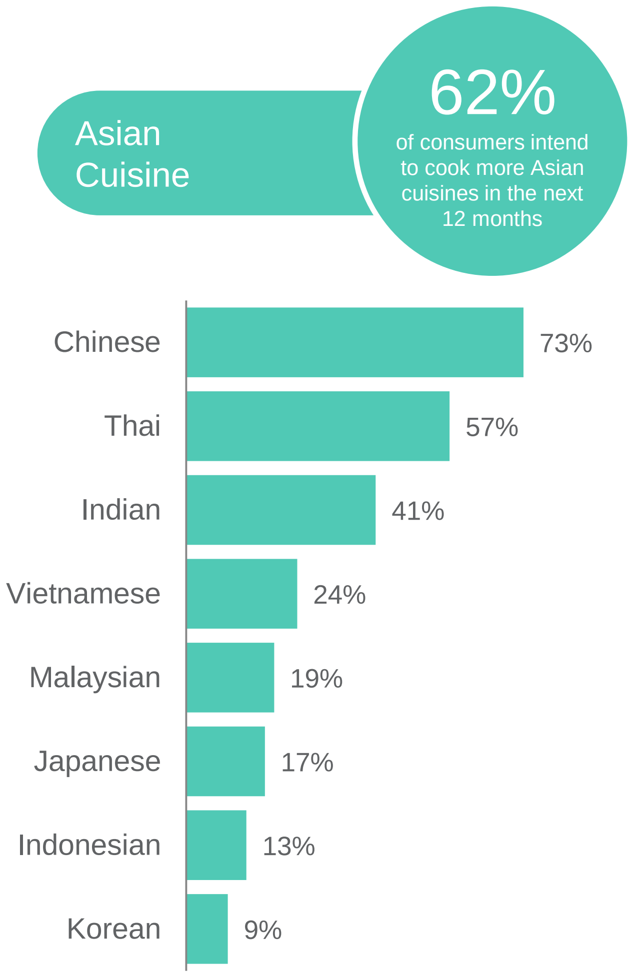
Nine in ten consumers currently cook Australian cuisines; however, there appears to be strong future intent to move away from traditional cooking styles into dishes and flavours that were once deemed niche and exotic.

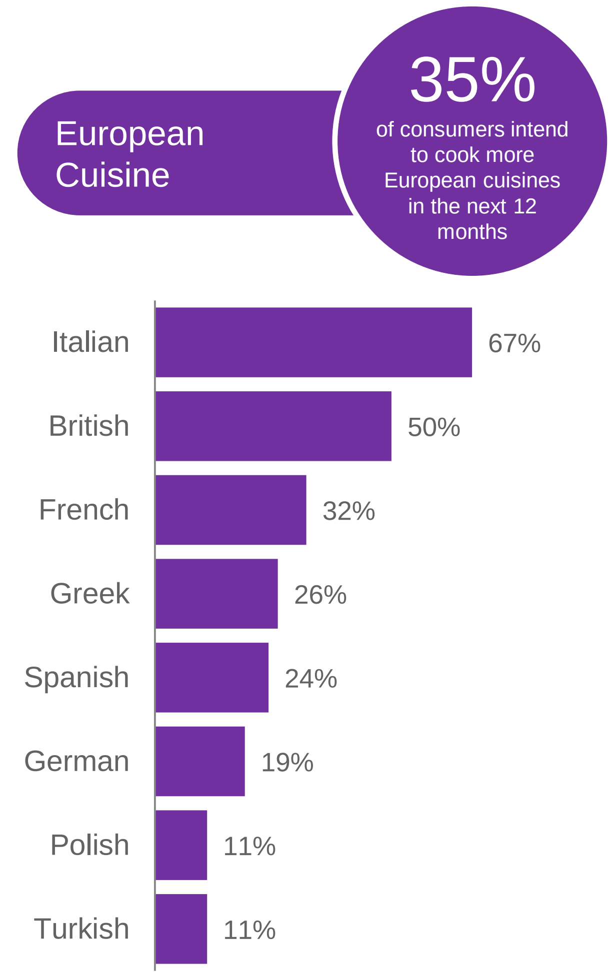
Future growth is expected to lie in Asian (56% to 62%) and Middle Eastern (11% to 17%) cuisines.

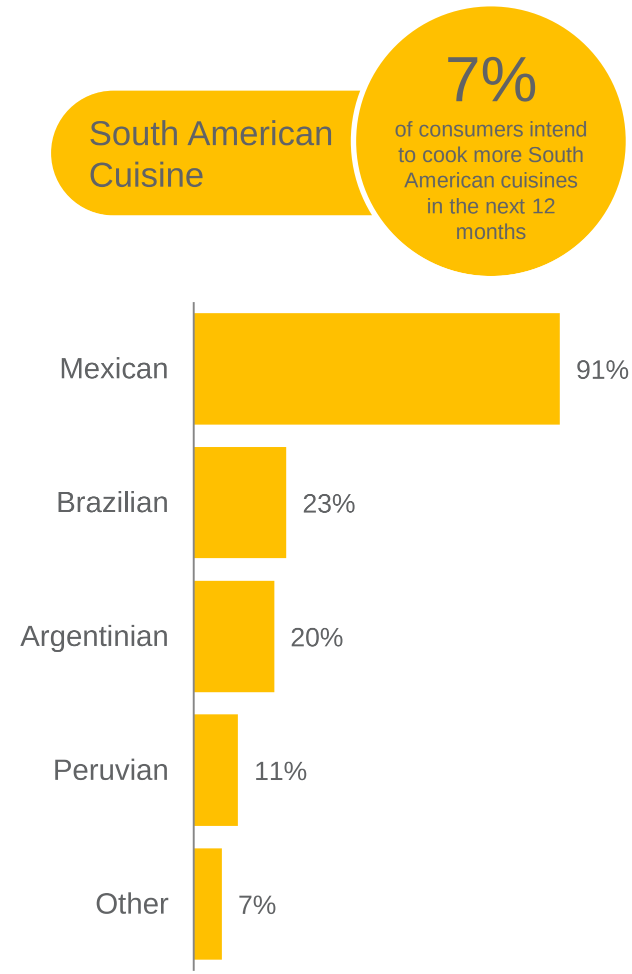


AHW41Q1 Which of the following cuisines do you regularly cook?
AHW41Q2a Which of the following cuisines do you plan on cooking more in the next 12 months?
(n=611)

The majority of consumers who intend to cook more Asian cuisine focused specifically on Chinese, Thai and Indian style cooking. Italian and British were the most common cuisines selected by those wanting to increase European style cooking. Approximately nine in ten (91%) of those wanting to cook more South American cuisines specifically chose Mexican as the specific style they intended to cook.





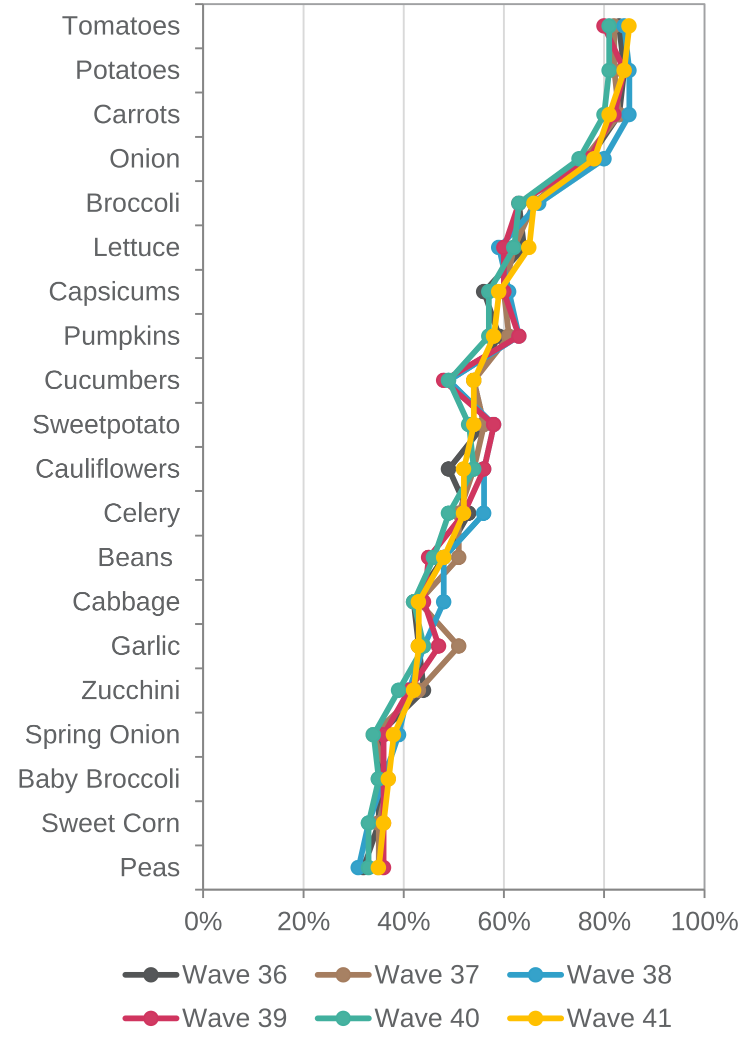


AHW41Q2b_2 Specifically, which Asian cuisines do you plan on cooking more in the next 12 months? (n=380)
AHW41Q2b_3 Specifically, which European cuisines do you plan on cooking more in the next 12 months? (n=214)
AHW41Q2b_5 Specifically, which South American cuisines do you plan on cooking more in the next 12 months? (n=44)

Wave 41: Overall Vegetable Tracking

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

This month sees the greatest increase in purchase of parsley, spring onion and tomatoes.



Category Health Explained

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

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

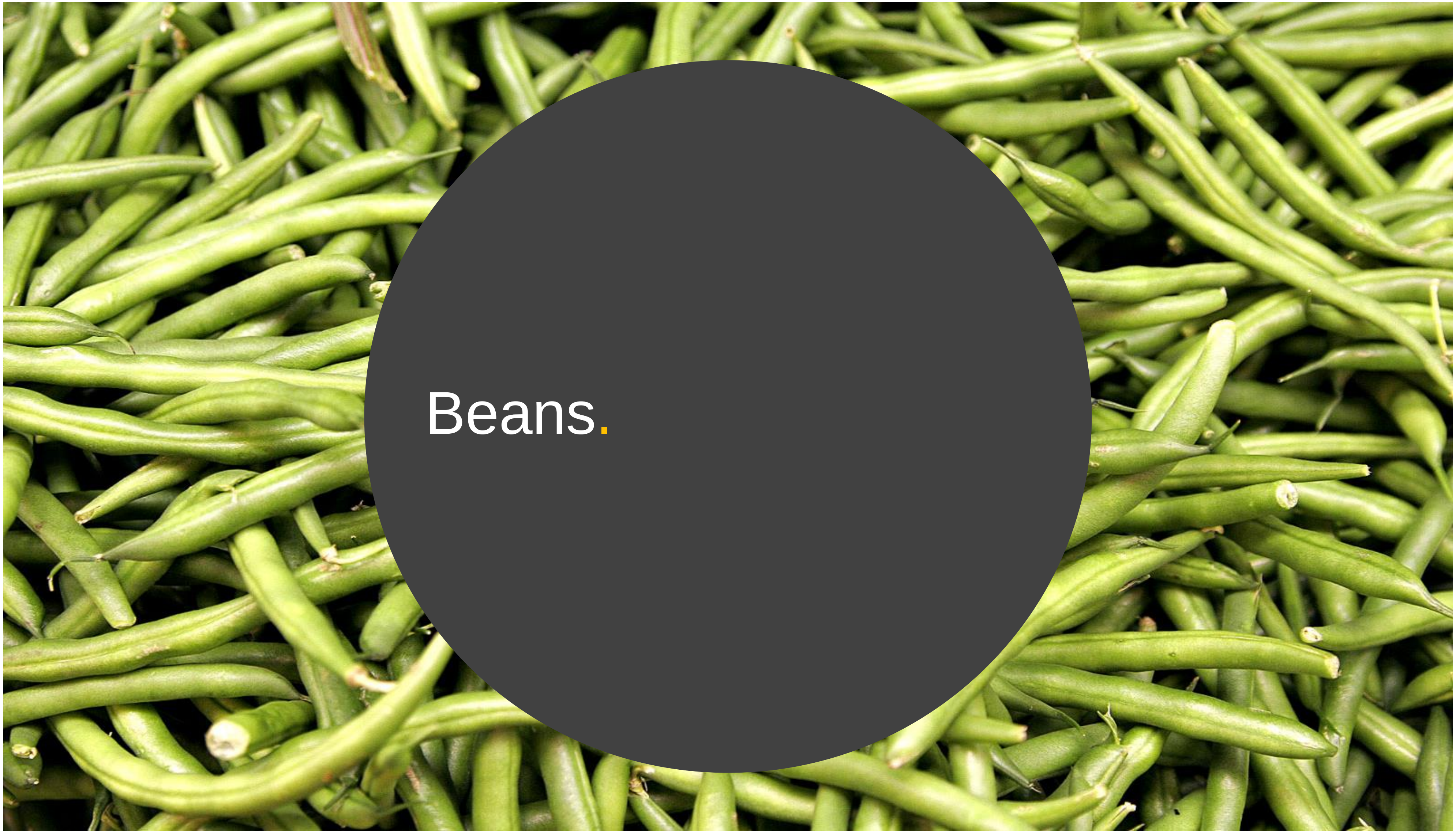
- How **important** to you is having a range of *commodity* available in the store where you usually shop?
- How **satisfied** or dissatisfied are you with the range of *commodity* currently available?
- How likely would you be to **recommend** *commodity* to your family and friends?
- How interested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

Parsley, pumpkin, and beans hold the greatest importance, with consumers most satisfied with pumpkins.

Recommendation to family and friends is high amongst all seven commodities, sitting above the Vegetable Average. In the future, consumers intend to purchase more baby broccoli and silverbeet, whilst purchase for the other commodities looks to remain stable.

	Beans	Carrots	Cauliflower	Pumpkin	Baby Broccoli	Silverbeet	Parsley	Vegetable Average
Importance	6.7	6.0	5.2	6.9	6.6	6.3	7.1	6.4
Satisfaction	6.7	6.8	7.0	7.4	7.1	6.7	7.1	6.7
Endorsement	7.3	7.1	7.2	7.2	7.2	7.2	7.3	7.0
Interest (New Types)	6.7	6.0	5.9	6.5	6.6	6.7	6.8	6.3
Future Purchase								
More	15%	9%	12%	10%	21%	20%	16%	16%
Same	83%	89%	86%	89%	79%	78%	81%	83%
Less	1%	1%	1%	1%	0%	2%	3%	1%

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



Beans.

Purchase frequency and consumption of beans both increased this wave.

Beans are generally bought through mainstream retailers, with purchase from Aldi trending upwards over the last three waves.

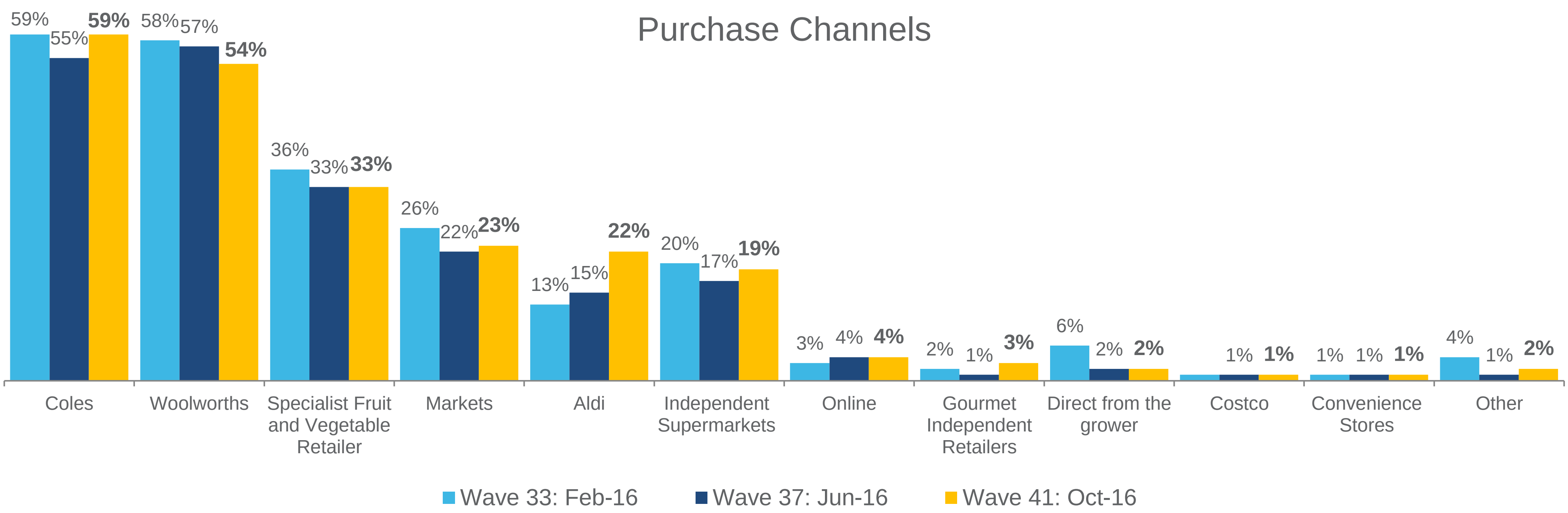
Average Purchase **4.3** times per month

- ▼ 4.0 times, Wave 33
- ▼ 3.6 times, Wave 37

Average Consumption **9.1** times per month

- — 9.1 times, Wave 33
- ▼ 8.5 times, Wave 37

Purchase Channels



Q1. On average, how often do you purchase French and runner beans?
Q2. On average, how often do you consume French and runner beans?
Q5. From which of the following channels do you typically purchase French and runner beans?
Sample Wave 33 N=301, Wave 37 N=306, Wave 41 N=301

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

Average Spend and Price Sensitivity

Average weight of purchase

The typical consumer purchases **650g** of beans, marginally higher than past waves.

- ▼ 610g, Wave 33
- ▼ 590g, Wave 37

Recalled last spend

Recalled last spend on bean purchase was **$3.50**, slightly higher than the previous two waves.

- ▼ $3.10, Wave 33
- ▼ $3.40, Wave 37

Value for money

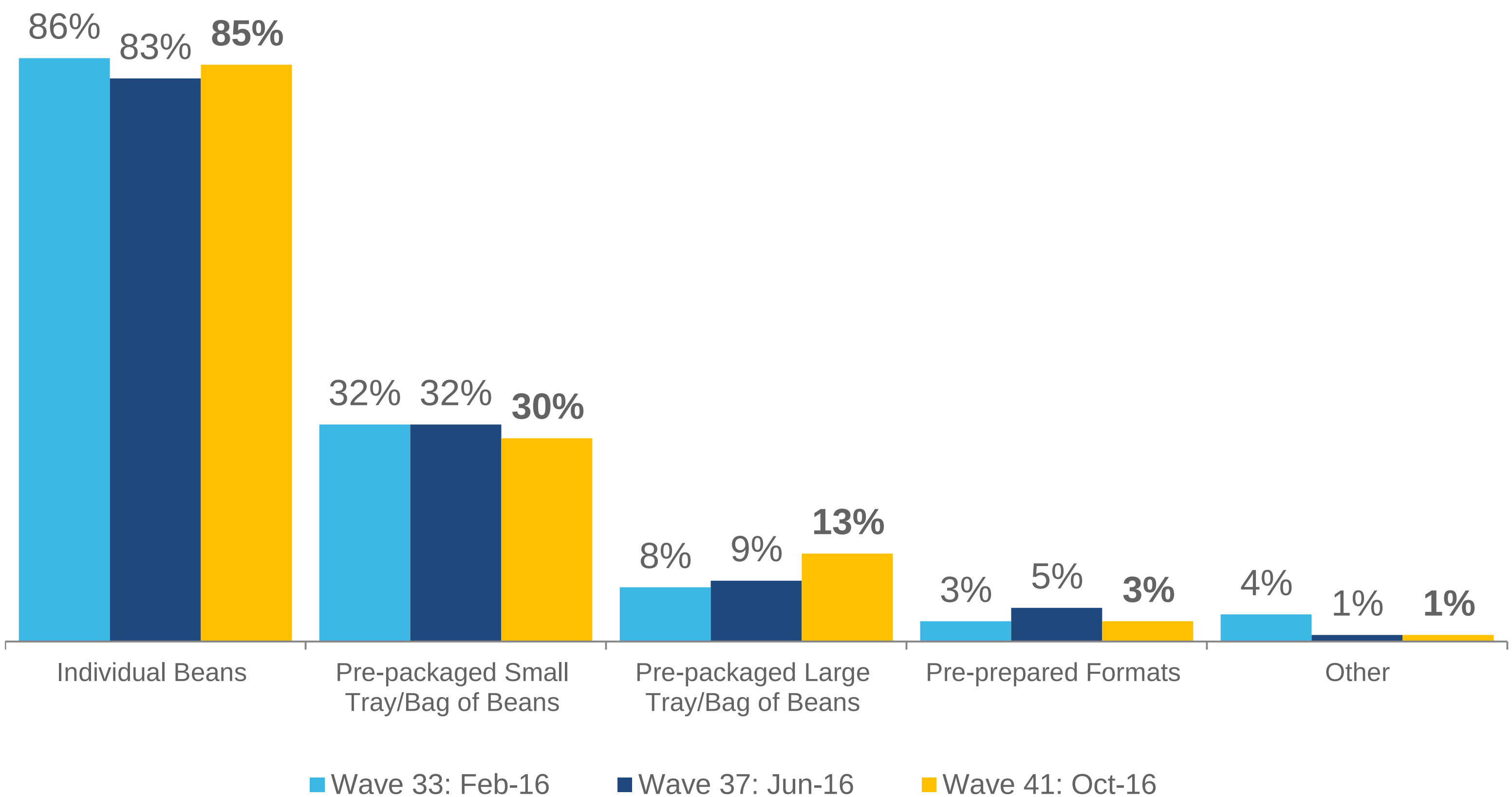
Consumers perceive beans as good value for money **(6.5/10)**, increasing over the last three waves.

- ▼ 6.3/10, Wave 33
- ▼ 6.4/10, Wave 37

Q3. How much French and runner beans do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is?
Sample Wave 33 N=301, Wave 37 N=306, Wave 41 N=301

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

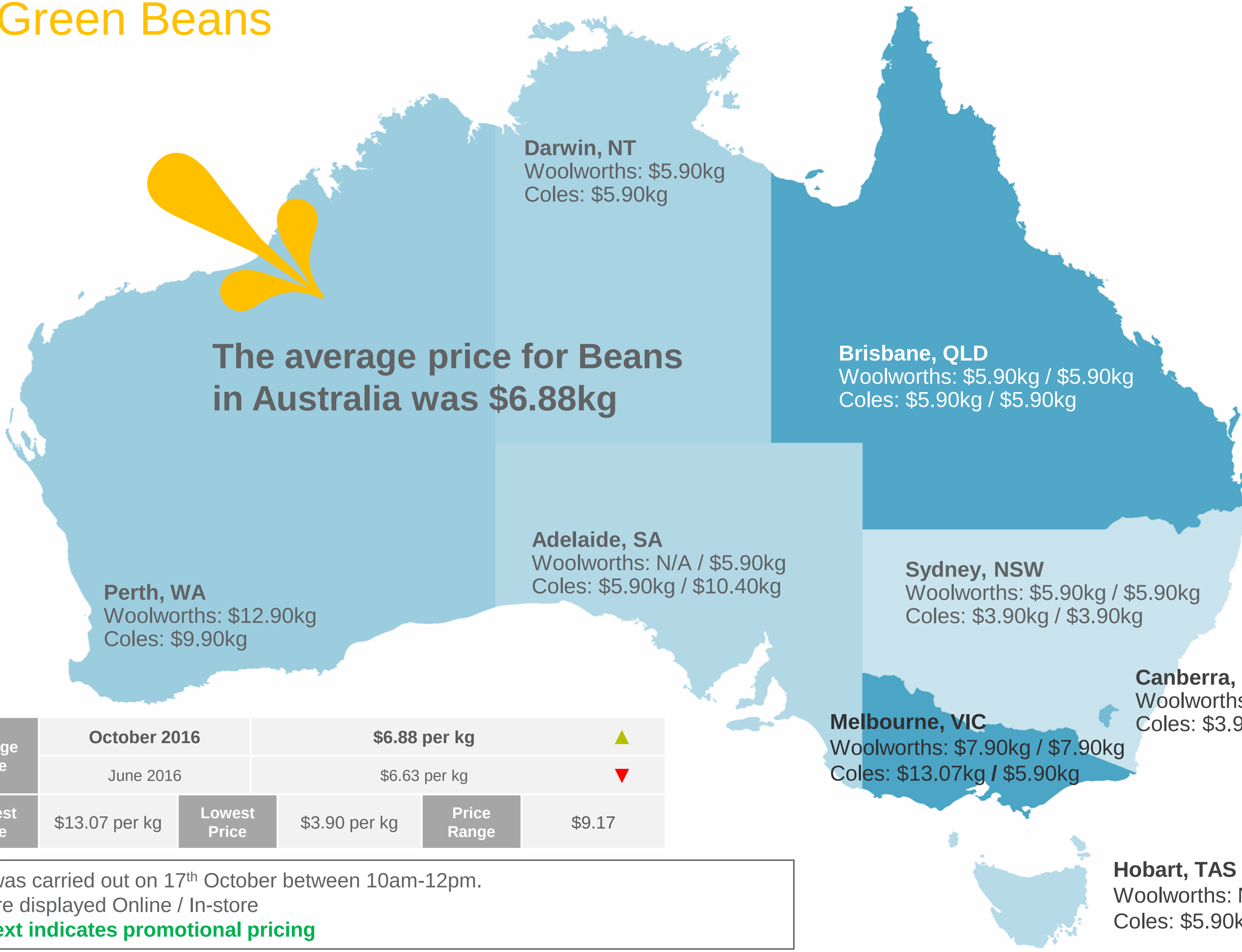
Loose beans remain the most common format purchased, which is consistent with all previous waves. There has been an increase this wave of beans purchased in pre-packaged large trays.



Q4b. In what fresh formats do you typically purchase Beans?
Sample Wave 33 N=301, Wave 37 N=306, Wave 41 N=301

Online and In-store Commodity Prices

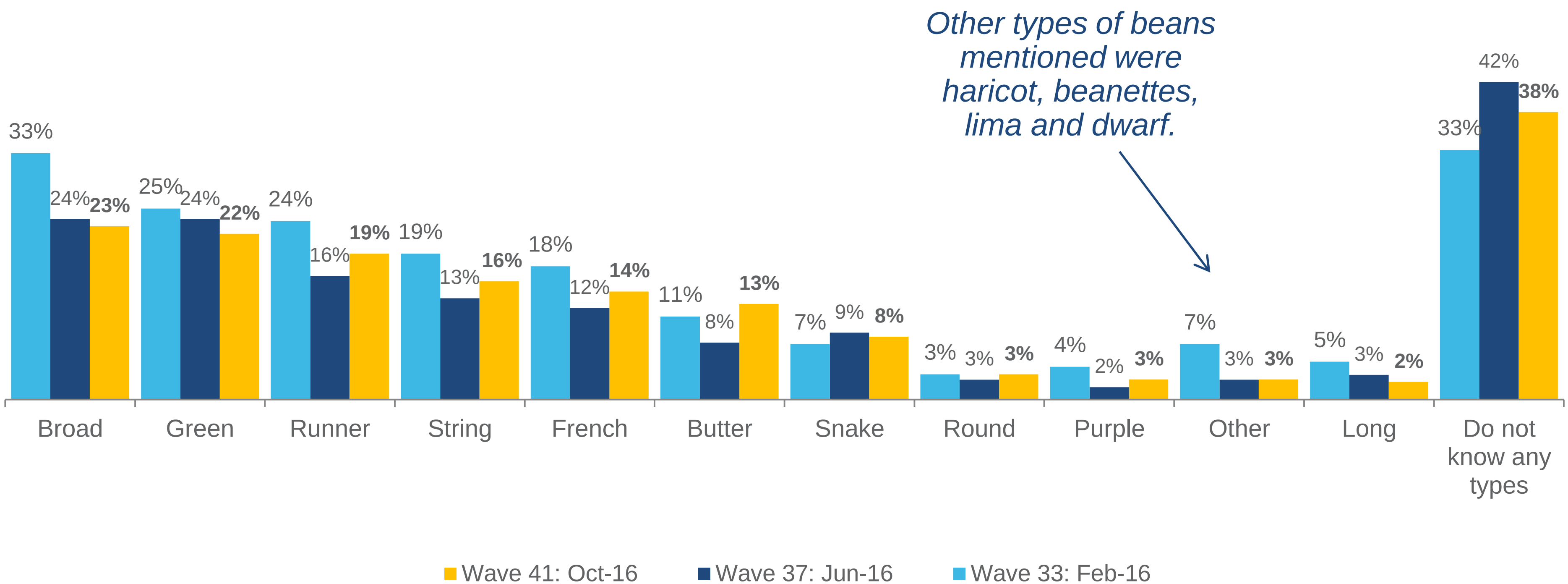
Green Beans



Average Price	**October 2016**	**$6.88 per kg** ▲			
	June 2016	$6.63 per kg ▼			
Highest Price	$13.07 per kg	**Lowest Price**	$3.90 per kg	**Price Range**	$9.17

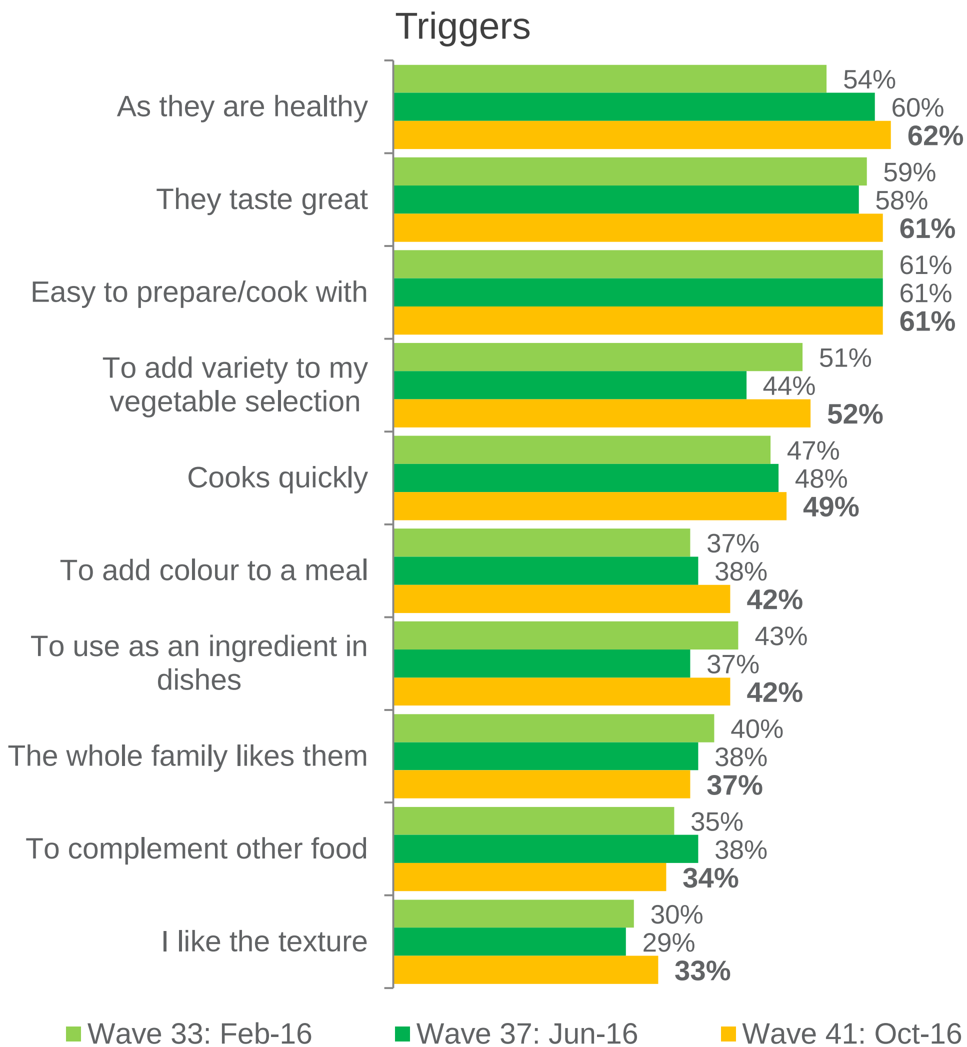
Pricing was carried out on 17th October between 10am-12pm.
Prices are displayed Online / In-store
Green text indicates promotional pricing

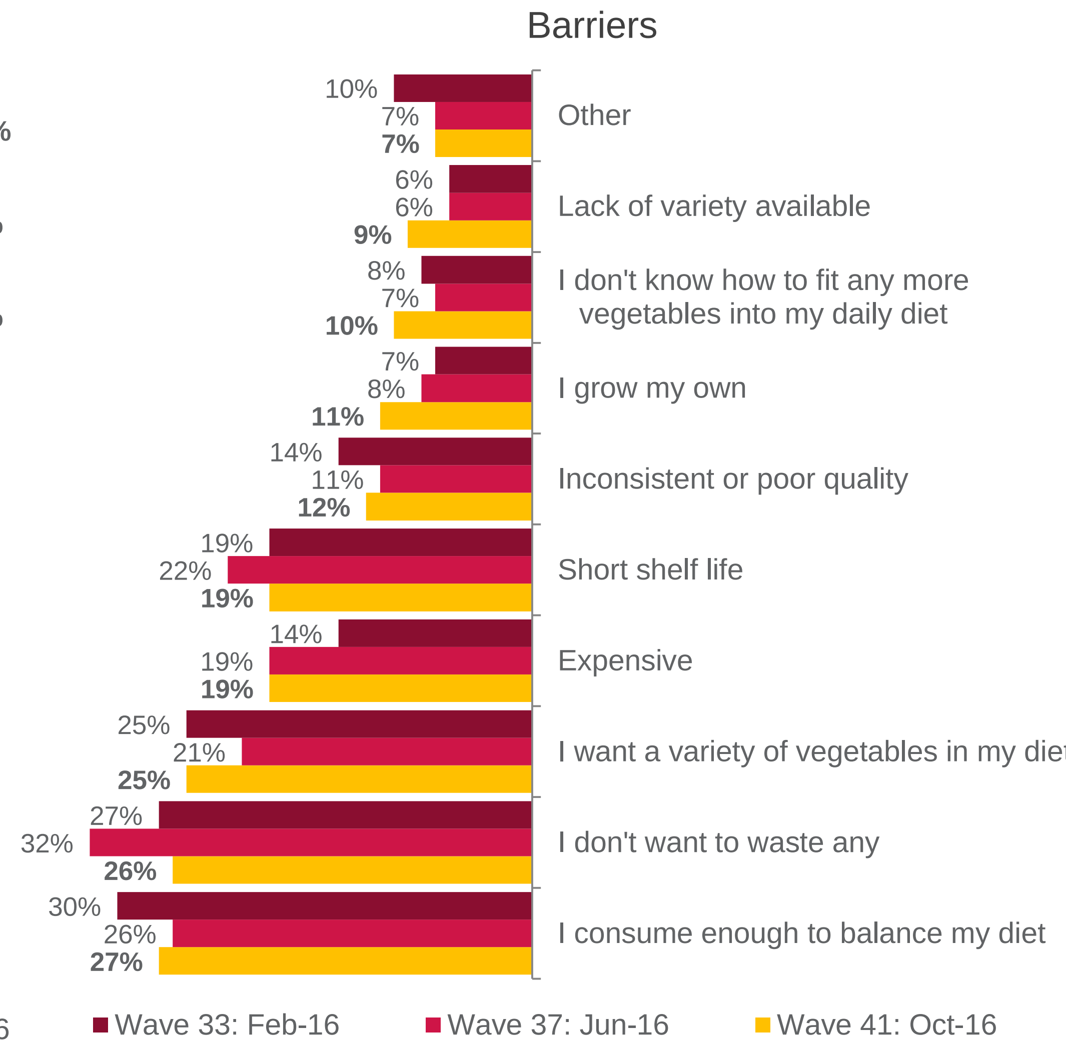
Approximately two in five consumers (38%) were unable to recall a type of green bean. Broad, green and runner varieties had the greatest level of recall, consistent with past waves.



Q6a. What varieties/types of French and runner beans are you aware of? (unprompted)
Sample Wave 33 N=301, Wave 37 N=306, Wave 41 N=301

Health, taste and ease of preparation are the primary motivations to purchasing beans. The main barriers to purchase are already consuming enough for their needs and not wanting to waste any. Health and adding colour to a meal have trended upwards as triggers to purchase over the last three waves.





Q7. Which of the following reasons best describes why you purchase French and runner beans?
Q8. Which reason best describes why you don't buy French and runner beans more often?
Sample Wave 33 N=301, Wave 37 N=306, Wave 41 N=301

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

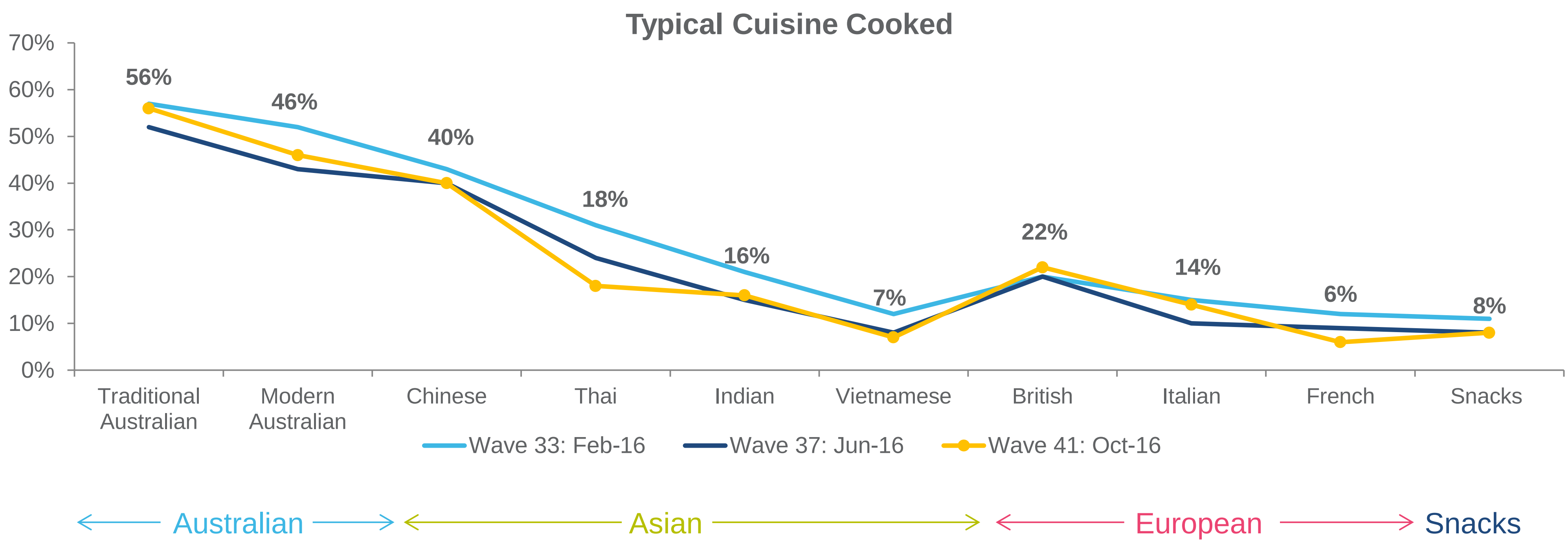
Consumption of green beans remains centred around dinner occasions.

Top 5 Consumption Occasions

	Wave 37	Wave 41
Dinner	77%	**79%**
Family meals	58%	**60%**
Weekday meals	46%	**52%**
Weekend meals	39%	**47%**
Quick Meals	41%	**38%**

14% used green beans when cooking a new recipe

▼ 13%, Wave 37



Q10. What cuisines do you cook/consume that use French and runner beans?
Q11. Which of the following occasions do you typically consume/use French and runner beans?
Sample Wave 33 N=301, Wave 37 N=306, Wave 41 N=301

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

Consumers are more likely to serve beans with carrots and potatoes. Steaming and stir frying remain the key cooking styles.

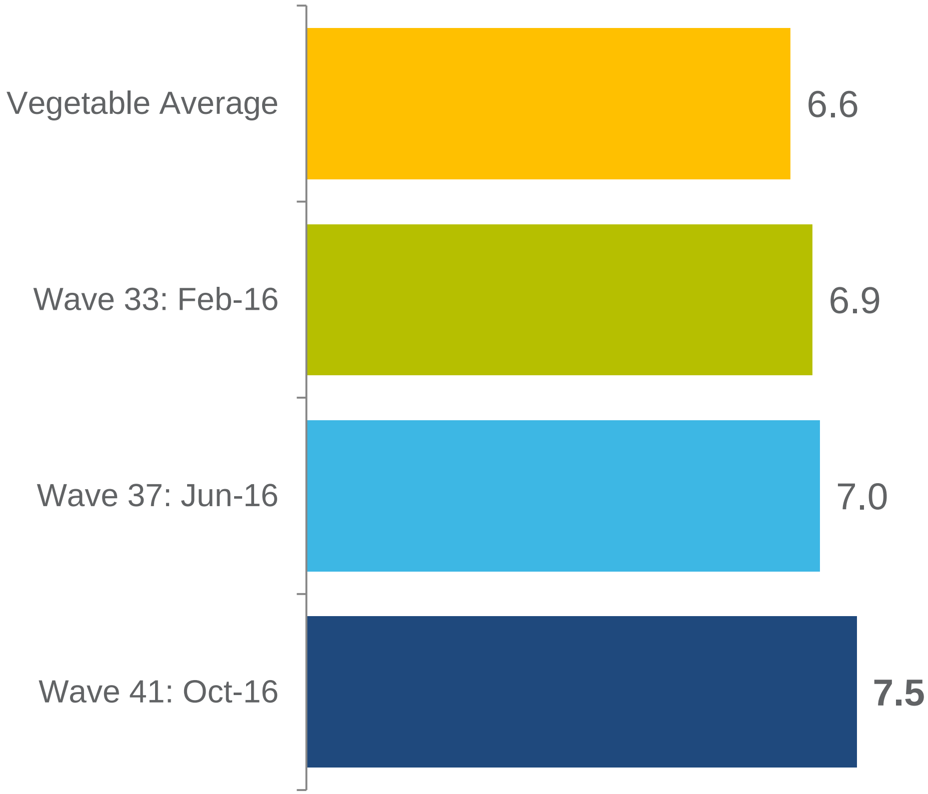
Accompanying Vegetables

Carrot	66%
Potato	64%
Broccoli	37%
Sweet Potato	34%
Cauliflower	32%

Top 10 Cooking Styles			
	Wave 33	Wave 37	Wave 41
Steaming	62%	54%	**55%**
Stir frying	50%	54%	**52%**
Boiling	44%	42%	**43%**
Microwave	23%	19%	**22%**
Slow Cooking	13%	12%	**18%**
Raw	20%	18%	**17%**
Sautéing	17%	14%	**17%**
Soup	16%	15%	**15%**
Frying	13%	12%	**13%**
Roasting	4%	5%	**4%**

Q9. How do you typically cook French and runner beans?
Q10a. And when are you serving French and runner beans which of the following do you also serve together with this?
Sample Wave 33 N=301, Wave 37 N=306, Wave 41 N=301

The importance of provenance for beans has increased this wave, sitting comfortably above the Vegetable Average. Knowing that beans are grown in Australia remains the most important information to consumers.



8.4 ▲

Wave 37: **8.0**

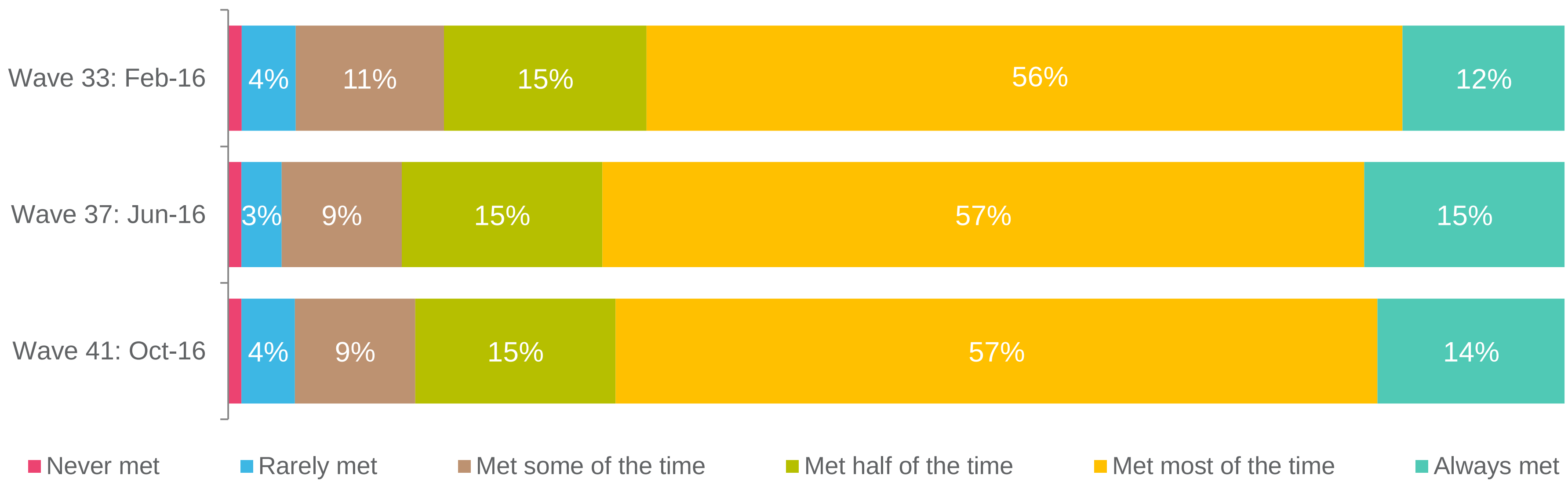
Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 33 N=301, Wave 37 N=306, Wave 41 N=301

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

Expected To stay fresh for **7.3** days

▲ 7.4 days, Wave 33
▲ 7.7 days, Wave 37

Expectations Met



Q12. How long do you expect French and runner beans to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy French and runner beans?
Sample Wave 33 N=301, Wave 37 N=306, Wave 41 N=301

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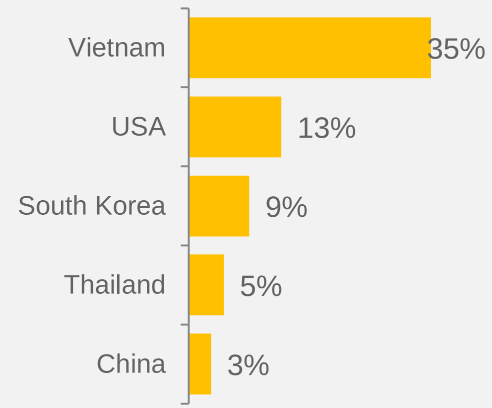
Bean Product Launch Trends.

Bean Global NPDs
July – October 2016

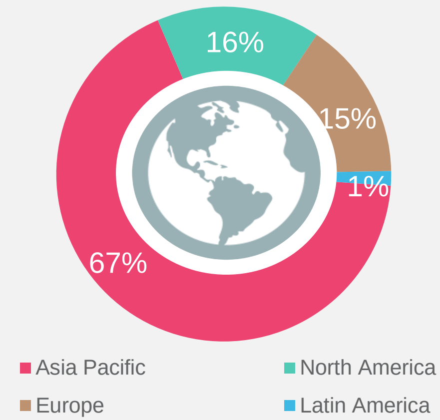
216 products containing green beans were launched globally in the last three months. Asia Pacific was the key region for launches. Bakery items and meals and meal centers were top categories, with seasonal, preservative free and microwaveable claims most commonly used.

Country

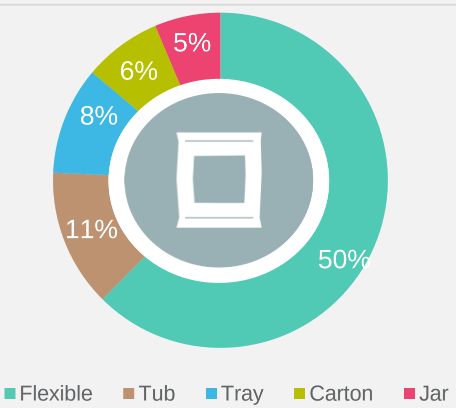


216 Global NPDs

Region



Top Pack Formats



Categories

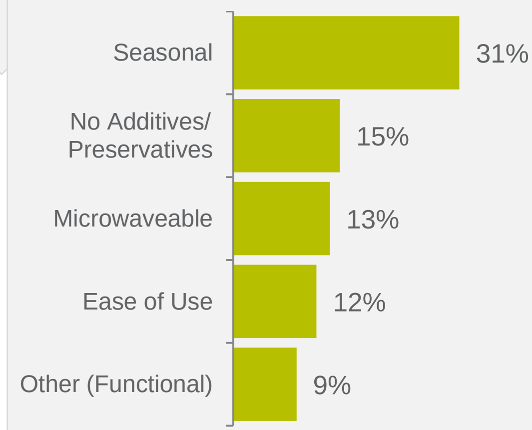
Bakery 38%

Meals 16%

Desserts 7%

Snacks 7%

Top Claims



Bean Product Launches:
Last 3 Months (July – October 2016)
Summary

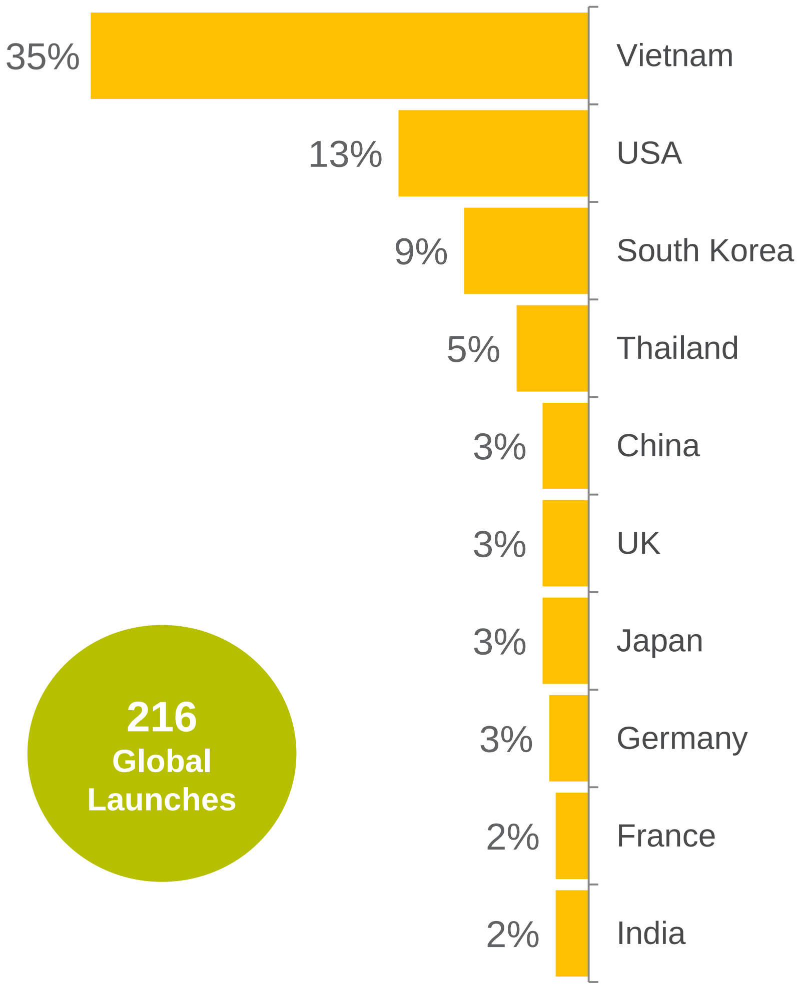
- A total of 216 products containing French and Runner beans as an ingredient were launched globally in the last 3 months, which is higher than the previous wave (176 launches).
- There was 1 product launched in Australia in the past three months.
- Asia Pacific (67%) continued to be the top region for product launches.
- Flexible (50%), tub (11%) and tray (8%) packaging formats are consistently used for bean products launched.
- The top categories for product launches were baked goods (38%), meals (16%), and desserts (7%).
- The core claims used for these launches globally were seasonal (31%), no additives/preservatives (15%), and microwaveable (13%).
- The most innovative launch was the chicken & prosciutto with a melting cheese sauce from the UK. Examples of innovative green bean products can be found on the following slides.

Source: Mintel (2016)

Bean Launches
Country & Categories

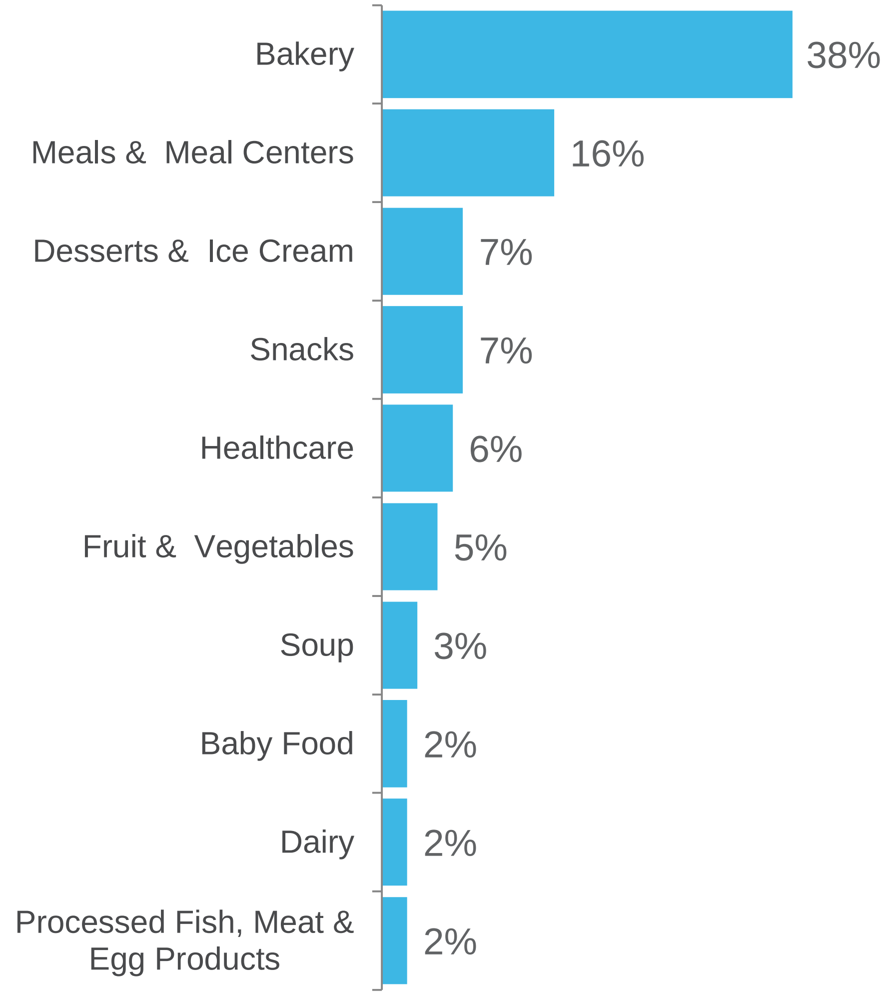
- Vietnam was the key country for green bean product launches, followed by USA and South Korea.
- Bakery, meals and desserts & ice cream products were the top categories for launches.

Top Launch Countries



216 Global Launches

Top Launch Categories



Bean Launches
Top Claims & Pack Formats Used

- Seasonal was the most prominent claim in Wave 41. No additives/ preservatives and microwaveable were also commonly used.
- Globally the top pack formats used for product launches were flexible packaging and tubs.

Pack Formats Used

Global	Flexible	50%
Global	Tub	11%
Global	Tray	8%
Asia Pacific	Flexible	63%
Asia Pacific	Tub	8%
Asia Pacific	Flexible sachet	5%
North America	Flexible	29%
North America	Tub	24%
North America	Tray	18%

Top Claims Used

Global	Seasonal	31%
Global	No Additives/Preservatives	15%
Global	Microwaveable	13%
Asia Pacific	Seasonal	46%
Asia Pacific	No Additives/Preservatives	10%
Asia Pacific	Vegetarian	8%
North America	Microwaveable	44%
North America	No Additives/Preservatives	35%
North America	Ethical - Environmentally Friendly Package	26%

Innovative Bean Launches:
L3M (July – October 2016)

Werda Safari Three Bean Salad (South Africa)

Werda Safari Three Bean Salad is ready to eat, naturally low in fat, convenient, fridge-free, fuss-free and perfect for outdoor activities. It has been processed according a special flavour-locking technology and the food can be consumed anywhere, anytime. The halal product is suitable for lacto vegetarians and retails in a 420g recyclable pack.

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

Babybio Organic Peas Zucchini Soup (Hong Kong)

Babybio Organic Peas Zucchini Soup is now available. This vegetable soup is made with peas from Spain, zucchini from Provence and rice, and is suitable for babies from six months. It is free from added salt, gluten and milk, and can be microwaved This organic and Ecocert certified product retails in a 190g pack, featuring cooking instructions, the AB, EU Green Leaf and Facebook logos, and a QR code.

Claims:
Microwaveable, Organic, Low/No/Reduced Sodium, Babies & Toddlers (0-4), Gluten-Free, Low/No/Reduced Allergen, Social Media

SmartMade Thai-Style Chicken & Vegetables (USA)

SmartMade Thai-Style Chicken & Vegetables comprises real grilled white meat chicken with yellow carrots and roasted green peppers over brown rice and red quinoa lightly tossed in a Thai basil fat-free Greek yogurt sauce. This USDA inspected microwaveable product is an excellent source of protein, contains no artificial flavors or colors and retails in a 10-oz. pack.

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

West Coast Green Bean and Ras el Hanout Dipping Crackers (Singapore)

West Coast Green Bean and Ras el Hanout Dipping Crackers are made with green bean flour. The vegetarian product can be enjoyed with curry as an alternative to poppadoms. It retails in an 80g pack.

Claims:
Vegetarian

Source: Mintel (2016)

Innovative Bean Launches:
L3M (July – October 2016)

M&S Cook Menu Chicken & Prosciutto with a Melting Cheese Sauce (UK)

M&S Cook Menu Chicken & Prosciutto with a Melting Cheese Sauce is described as chicken breasts wrapped in prosciutto ham stuffed with cheese sauce and green beans. This ready-to-cook product is suitable for home freezing, and cooks in 30 minutes in the oven. It is made with assured pork, and retails in a 415g partly recyclable pack bearing the FSC logo.

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

Mabu Nutrition Stage 2 Weaning Porridge (Vietnam)

Mabu Nutrition Chao An Dam So 2 Chao Nguyen Hat (Stage 2 Weaning Porridge) is specially designed for babies aged six months onwards. The product is formulated with Japonica, Japanese sushi rice, selenium and vegetable germ powder. According to the manufacturer, rice germ powder is rich in zinc, calcium, iron and fibre for better appetite and digestive health. Selenium helps improve nutrients absorbency and boost the immune system.

Claims:
No Additives/Preservatives, All Natural Product, High/Added Fiber, Other (Functional), Babies & Toddlers (0-4), Digestive (Functional), Immune System (Functional), Time/Speed, Social Media

Enice Shelled Shrimps with Assorted Vegetables (China)

Hai Tian Xia Za Cai Xia Ren (Shelled Shrimps with Assorted Vegetables) can be stir-fried by adding spring onion and seasonings. The product retails in a 300g pack featuring a QR code.

Claims:
N/A

The Food Hall Kitchen Nicoise Salad (Indonesia)

The Food Hall Kitchen Nicoise Salad is freshly made. This product retails in a plastic pack.

Claims:
N/A

Source: Mintel (2016)

Innovative Bean Launches:
L3M (July – October 2016)

Pirkka Seasoned Wok Vegetables (Finland)

Pirkka Maustetut Wokvihannekset (Seasoned Wok Vegetables) are now available. This product cooks in eight to ten minutes in a pan, and retails in a 450g pack that features a recipe suggestion.

Claims:
N/A

AH Chinese Wok Vegetables with Bean Sprouts and Red Peppers (Netherlands)

AH Chinese Wokgroenten Taugé & Rode Paprika (Chinese Wok Vegetables with Bean Sprouts and Red Peppers) have been repackaged. They comprise a ready-made base with cabbage, green beans, peppers, leeks and bean sprouts for Eastern-style stir-fry dish. The gluten- and milk-free product retails in a 400g pack bearing the Gezondere Keuze (Healthier Choice) and Plastic Heroes logo.

Claims:
Gluten-Free, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Package, Ease of Use

Haiha Kotobuki Green Bean Moon Cakes (Vietnam)

Haiha Kotobuki Banh Trung Thu-Banh Nuong Nhan Mem Dau Xanh (Green Bean Moon Cakes) have been repackaged in a newly designed pack to celebrate the 2016 Mid-Autumn Festival. The product retails in a pack containing two 150g packs.

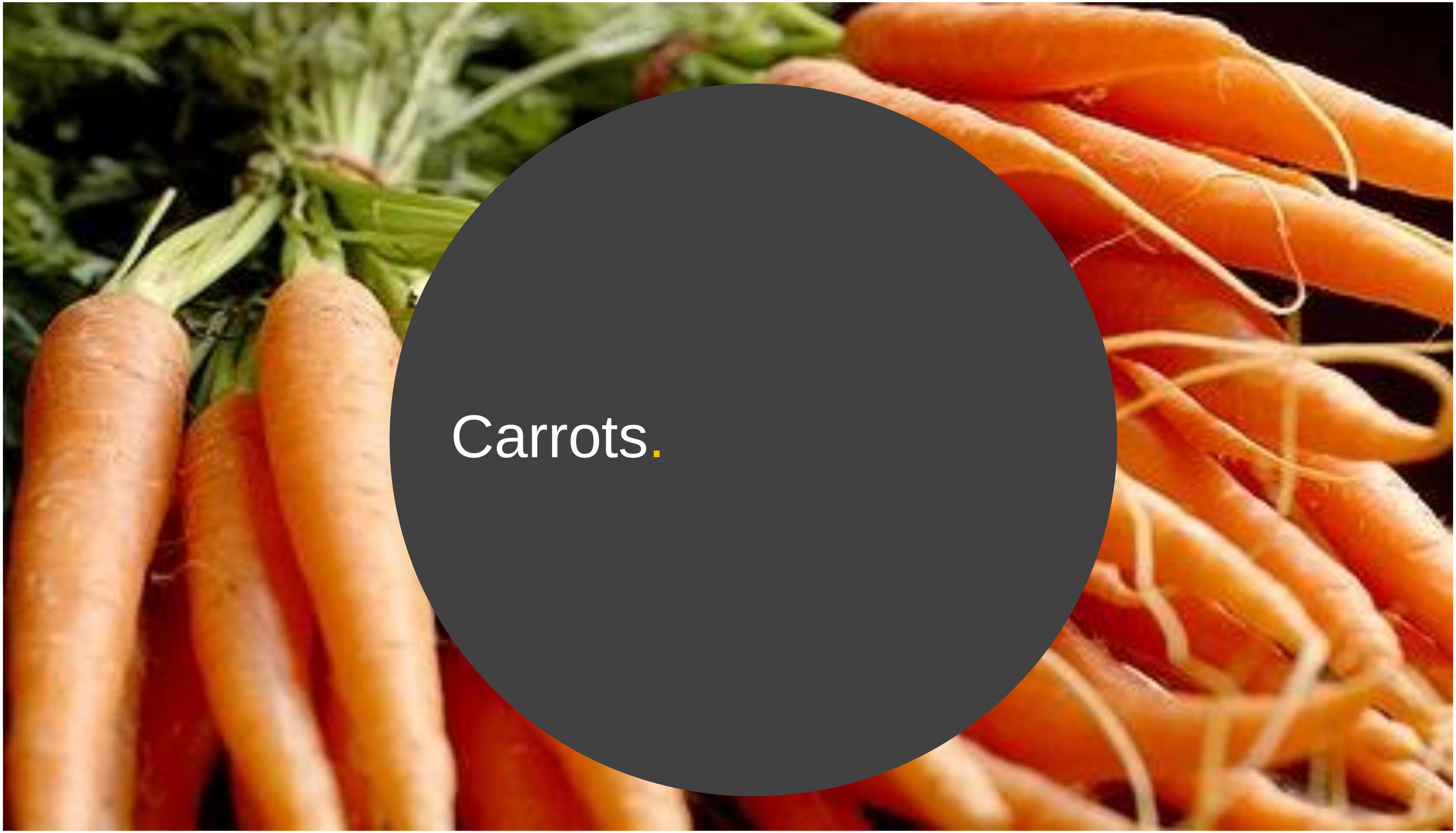
Claims:
Seasonal

Morrisons a Taste of Asia Green Thai Chicken Curry with Jasmine Rice (UK)

Morrisons a Taste of Asia Green Thai Chicken Curry with Jasmine Rice comprises tender chicken pieces in a spiced coconut, lemongrass and lime leaf sauce, topped with green beans and water chestnuts, with fragrant jasmine rice. This mild spiced product is microwavable and retails in a recyclable 385g pack, featuring a QR code.

Claims:
Microwaveable, Ethical - Environmentally Friendly Package

Source: Mintel (2016)



Carrots.

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

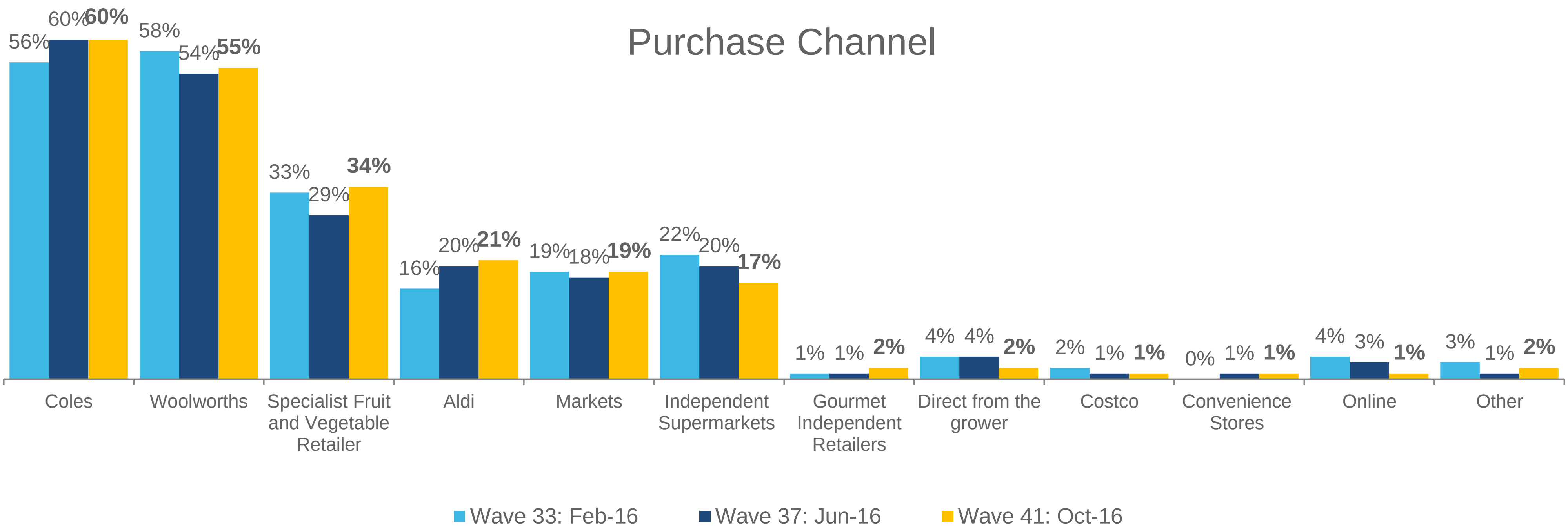
Mainstream retailers remain the key purchase channel. This wave sees a continuing decline in purchase from independent supermarkets, while Aldi has trended upwards over the last three waves.

Average Purchase **4.0** times per month

– 4.0 times, Wave 33
▼ 3.7 times, Wave 37

Average Consumption **14.5** times per month

▲ 14.7 times, Wave 33
▼ 14.4 times, Wave 37



Q1. On average, how often do you purchase carrot?
Q2. On average, how often do you consume carrot?
Q5. From which of the following channels do you typically purchase carrot?
Sample Wave 33 N=302, Wave 37 N=306, Wave 41 N=301

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

Average Spend and Price Sensitivity

Average weight of purchase

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

— 1.1kg, Wave 33
— 1.1kg, Wave 37

Recalled last spend

Recalled last spend on carrots was **$2.40**, which has slightly decreased since the last wave.

▼ $2.30, Wave 33
▲ $2.70, Wave 37

Value for money

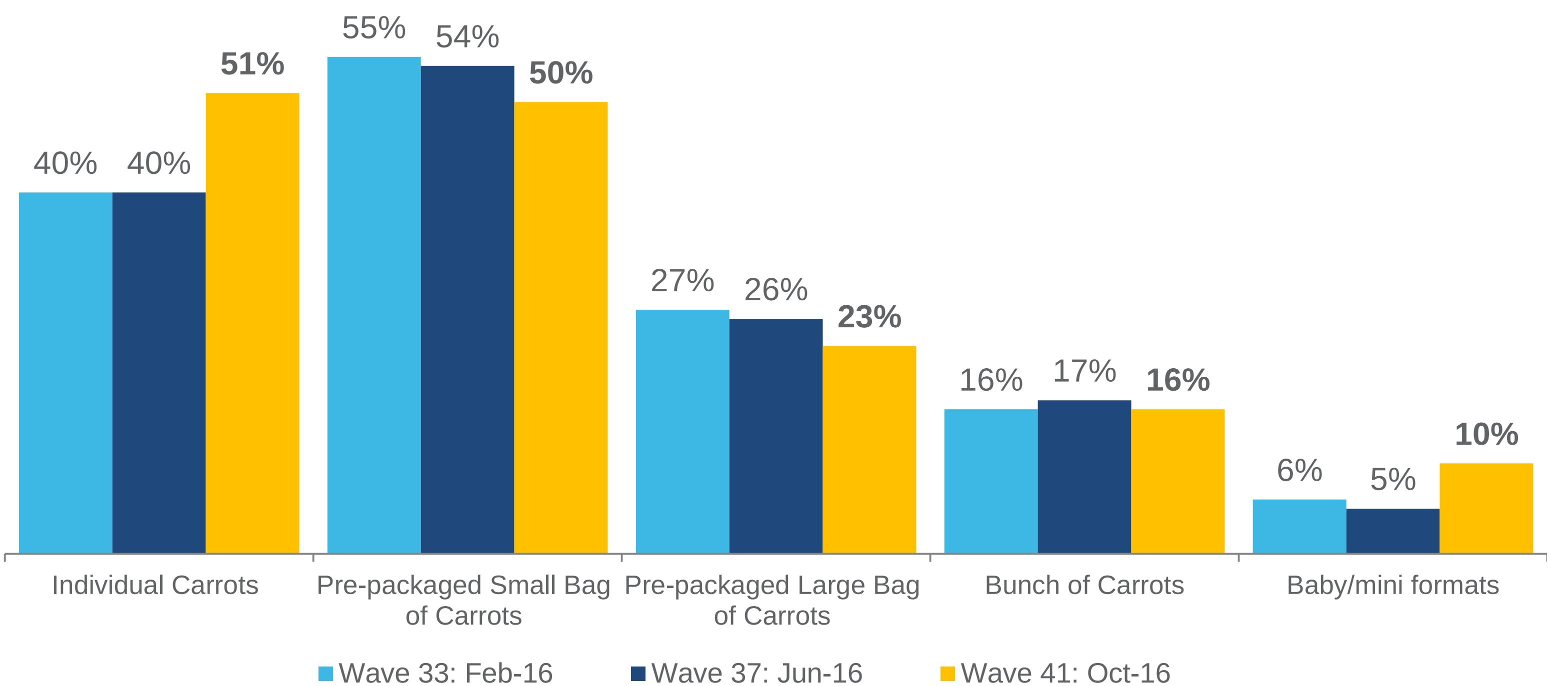
Carrots are perceived to be very good value for money **(7.7/10),** slightly higher than previous waves.

▼ 7.5/10, Wave 33
▼ 7.6/10, Wave 37

Q3. How much carrot do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? 0-10 scale
Sample Wave 33 N=302, Wave 37 N=306, Wave 41 N=301

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

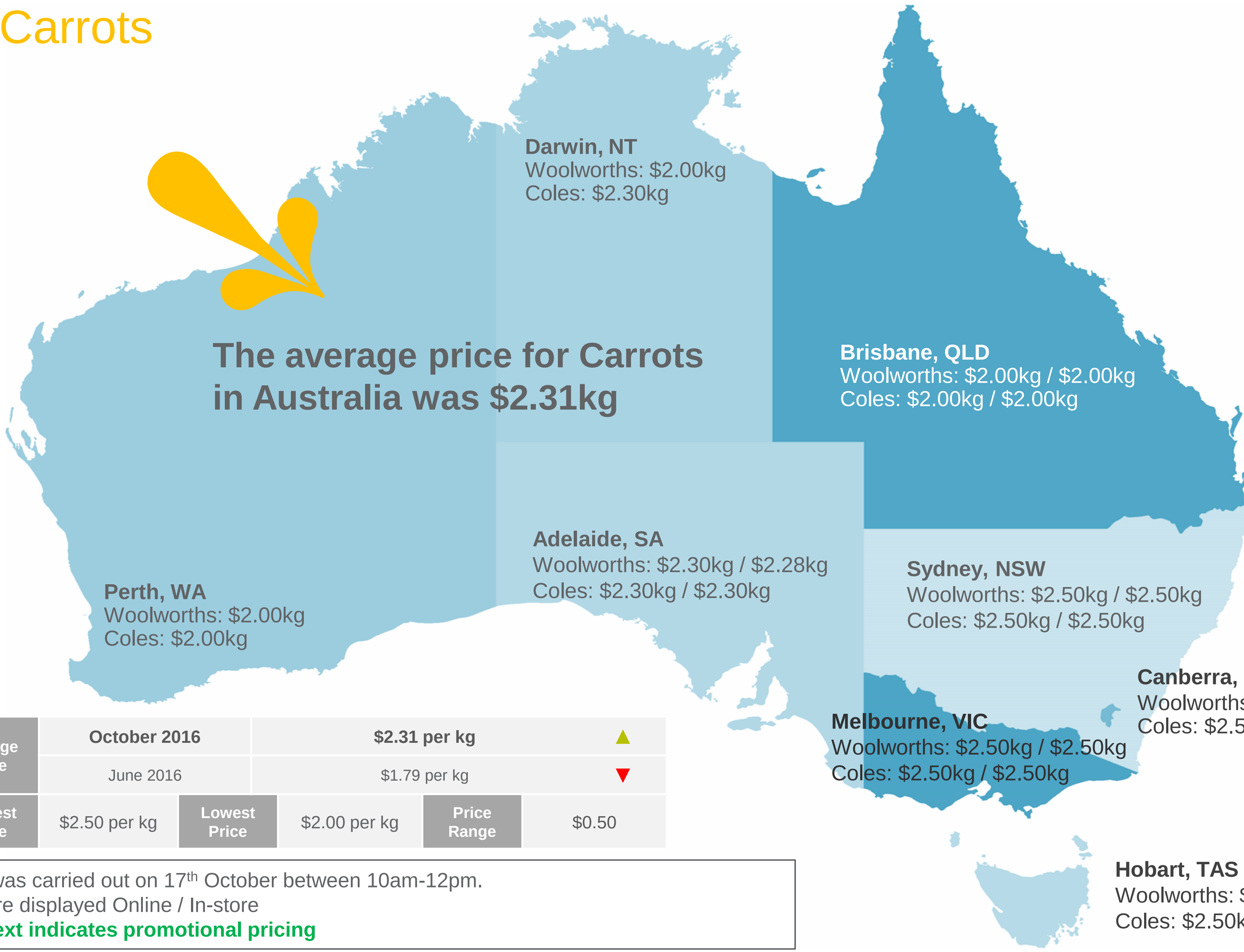
This wave saw a significant increase in purchase of individual carrots, which overtakes pre-packaged small bags as the primary format purchased. Pre-packaged small and large bags have trended downwards as a purchase format over the last three waves.



Q4b. In what fresh formats do you typically purchase Carrots?
Sample Wave 33 N=302, Wave 37 N=306, Wave 41 N=301

Online and In-store Commodity Prices

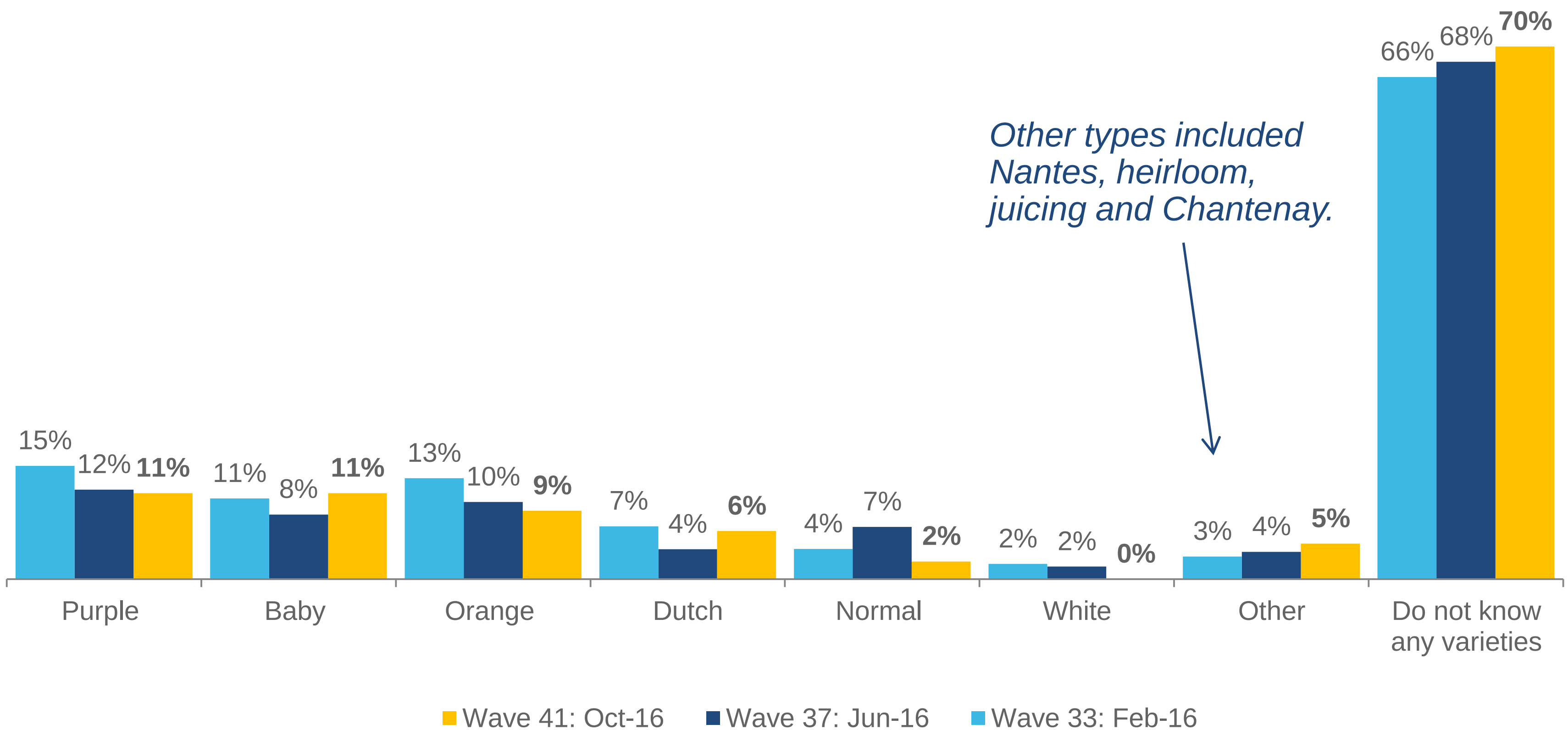
Carrots



Average Price	**October 2016**	**$2.31 per kg** ▲			
	June 2016	$1.79 per kg ▼			
Highest Price	$2.50 per kg	Lowest Price	$2.00 per kg	Price Range	$0.50

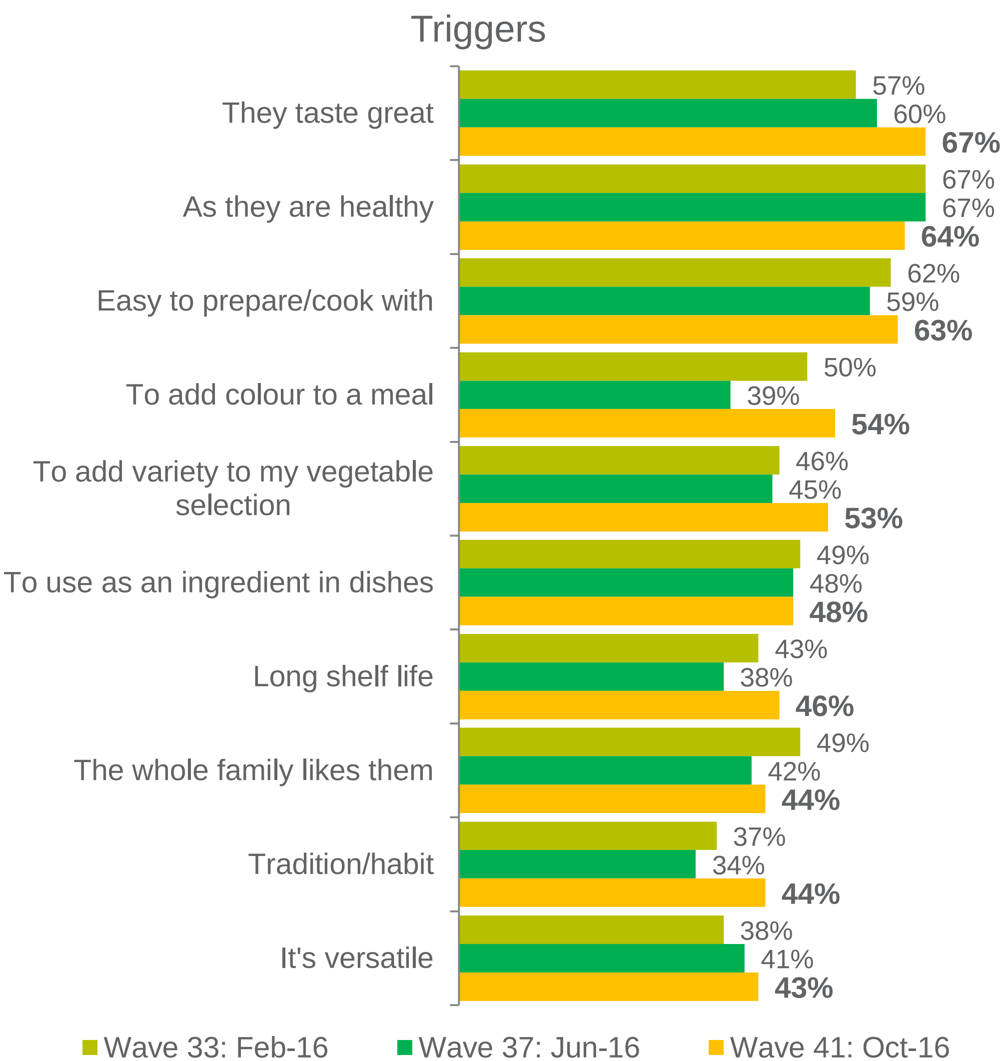
Pricing was carried out on 17th October between 10am-12pm.
Prices are displayed Online / In-store
Green text indicates promotional pricing

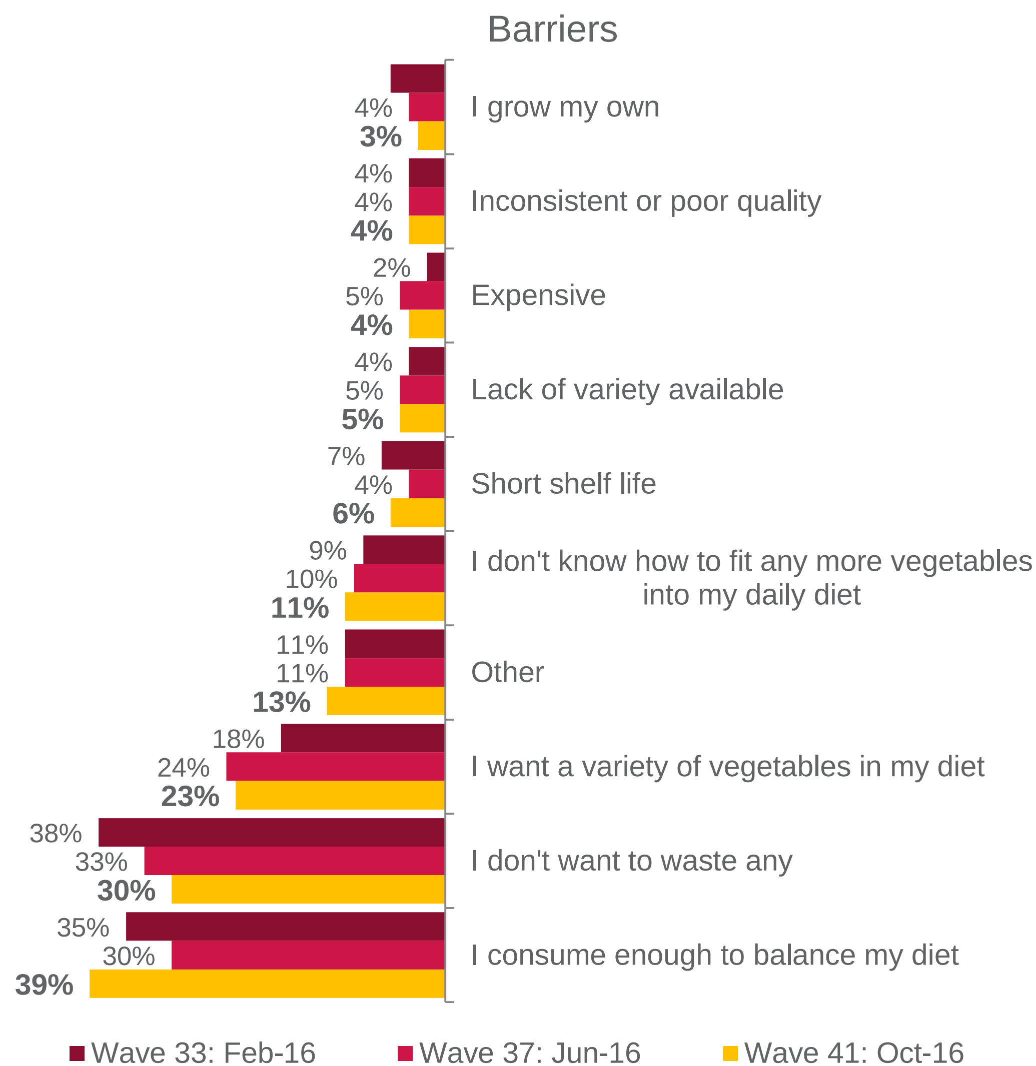
Over two thirds of consumers are unable to recall a type of carrot. Colour remains the main trigger for unprompted carrot variety awareness, but this has trended downwards over the past four waves.



Q6a. What varieties/types of carrot are you aware of? (unprompted)
Sample Wave 33 N=302, Wave 37 N=306, Wave 41 N=301

Taste, health and ease of preparation are the main drivers of carrot purchase. Already consuming enough and not wanting to waste any remain the main barriers for future purchase.





Q7. Which of the following reasons best describes why you purchase carrot?
Q8. Which reason best describes why you don't buy carrot more often?
Sample Wave 33 N=302, Wave 37 N=306, Wave 41 N=301

Carrots are typically cooked in Australian and Chinese cuisine. This wave sees an increase in carrots being consumed in British cuisine.

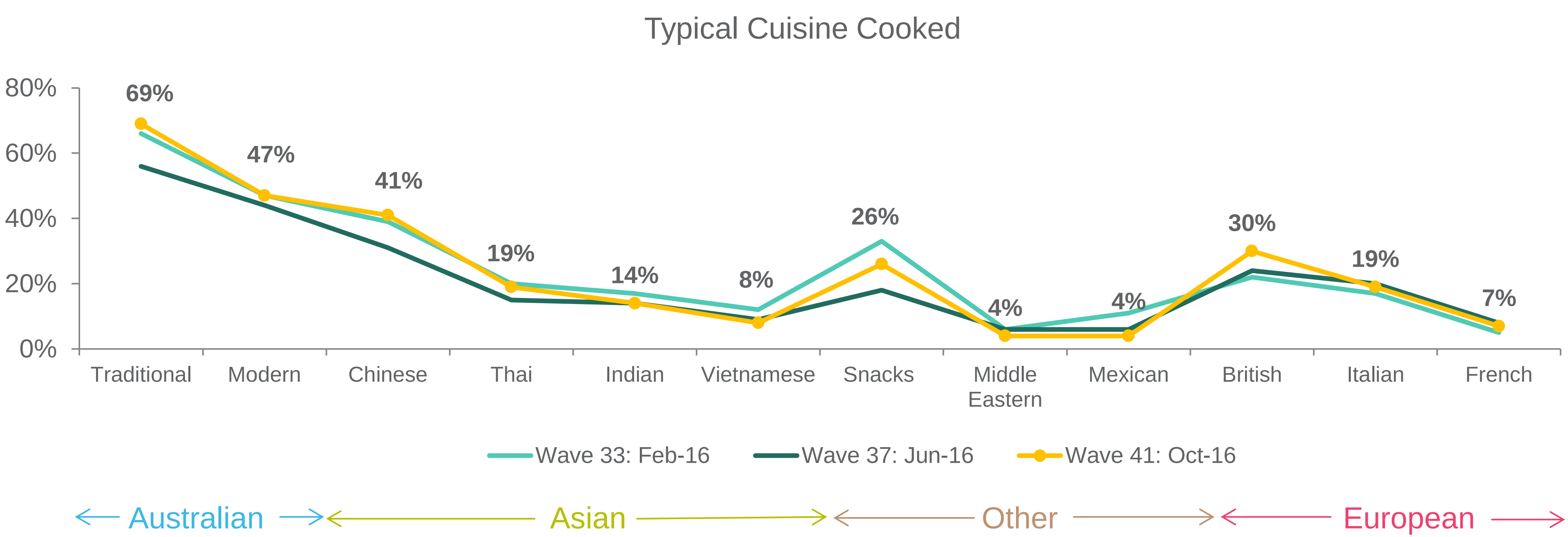
Dinner remains the dominant meal occasion, with approximately one fifth (21%) of consumers using carrots when cooking a new recipe.

Top 5 Consumption Occasions

	Wave 37	Wave 41
Dinner	78%	**81%**
Family meals	59%	**66%**
Weekday meals	51%	**56%**
Weekend meals	43%	**51%**
Quick Meals	43%	**43%**

21% use carrots when cooking a new recipe

▼ 16%, Wave 37



Q10. What cuisines do you cook/consume that use carrot?
Q11. Which of the following occasions do you typically consume/use carrot?
Sample Wave 33 N=302, Wave 37 N=306, Wave 41 N=301

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colmar brunton.

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

Carrots are typically served with potatoes, broccoli and onion.

Consumers cook carrots in a variety of ways. Stir frying is the most common style of cooking, whilst half of consumers eat carrots raw. Roasting, steaming and boiling are also popular methods of cooking.

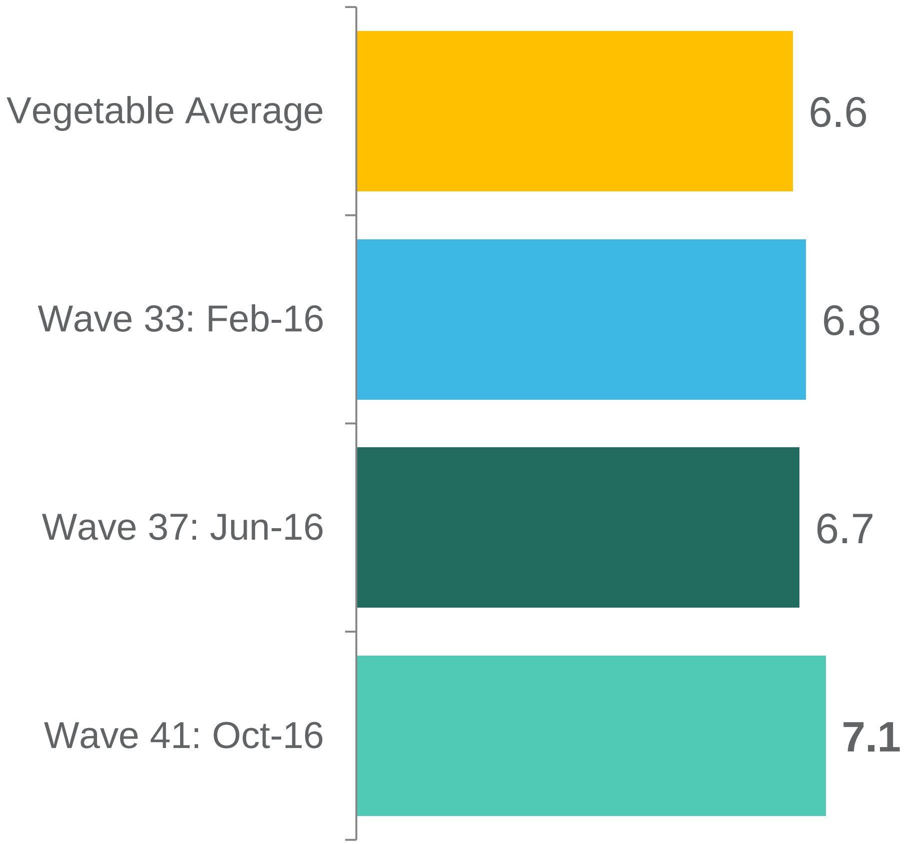
Accompanying Vegetables

- Potato 72%
- Broccoli 51%
- Onion 40%
- Cauliflower 37%
- Sweet Potato 36%

Top 10 Cooking Styles			
	Wave 34	Wave 37	Wave 41
Stir frying	52%	46%	**53%**
Raw	58%	47%	**50%**
Roasting	50%	44%	**48%**
Steaming	50%	45%	**46%**
Boiling	42%	45%	**45%**
Soup	33%	42%	**40%**
Baking	26%	24%	**30%**
Microwave	26%	15%	**27%**
Slow Cooking	28%	21%	**24%**
Sautéing	13%	9%	**12%**

Q9. How do you typically cook carrot?
Q10a. And when are you serving carrot which of the following do you also serve together with this?
Sample Wave 33 N=302, Wave 37 N=306, Wave 41 N=301

Carrot provenance has increased this wave, sitting comfortably above the Vegetable Average. Knowing their carrots are Australian grown remains the most important provenance information for consumers.



8.4 ▲

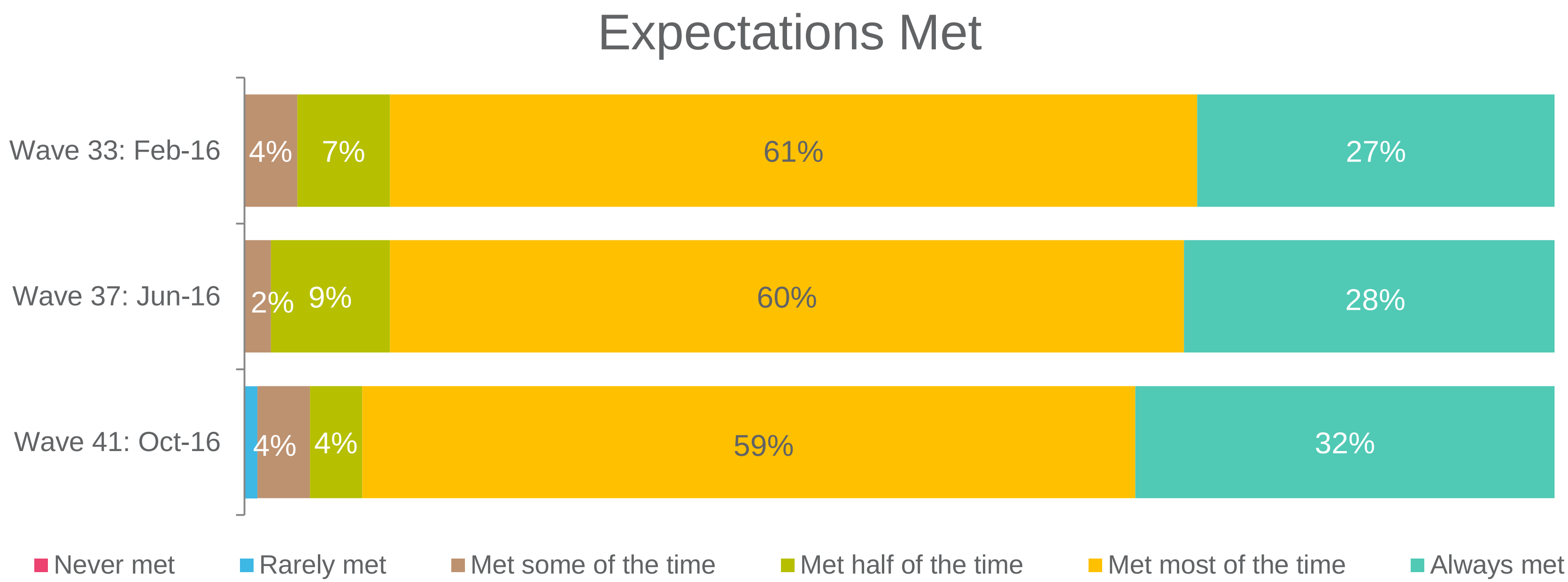
Wave 37: **7.9**

Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 33 N=302, Wave 37 N=306, Wave 41 N=301

Carrots are expected to stay fresh for just under two weeks, with freshness expectations increasingly being met all of the time.

Expected to stay fresh for **12.6** days

▲ 12.7 days, Wave 33
▲ 12.8 days, Wave 37



Q12. How long do you expect carrots to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy carrots?
Sample Wave 33 N=302, Wave 37 N=306, Wave 41 N=301

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

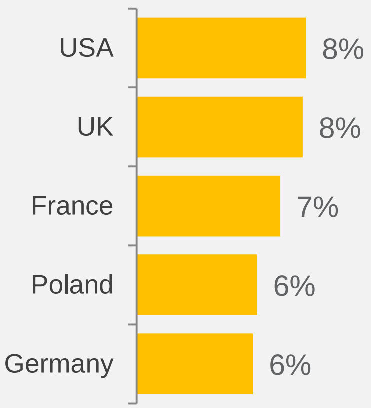
Carrot Product Launch Trends.

Carrot Global NPDs

July – October 2016

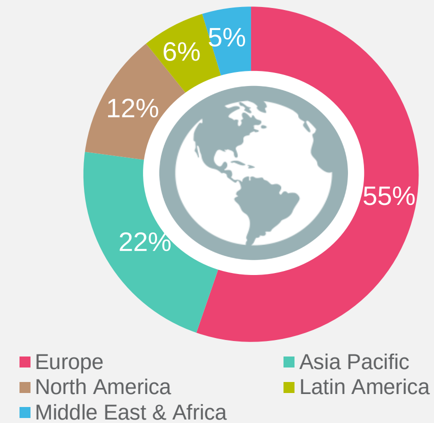
There were 1977 global new products launched over the last 3 months that contained carrot as an ingredient. The majority of these launches occurred in Europe. Flexible packaging was the most common format, and the key launch category was meals.

Country

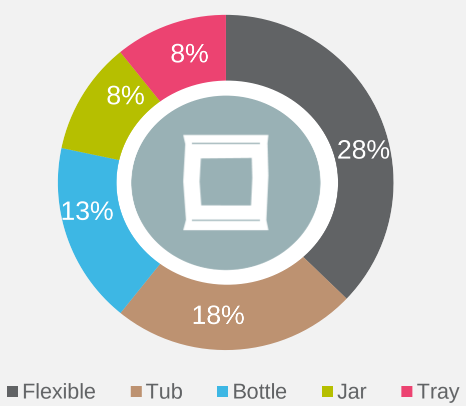


1977 Global NPDs

Region



Top Pack Formats



Categories

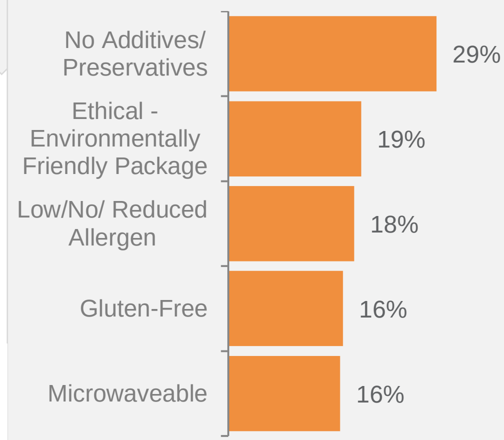
Meals 18%

Dairy 9%

Sauces & Seasonings 9%

Juice Drink 8%

Top Claims



Carrot Product Launches:
Last 3 Months (July – October 2016)
Summary

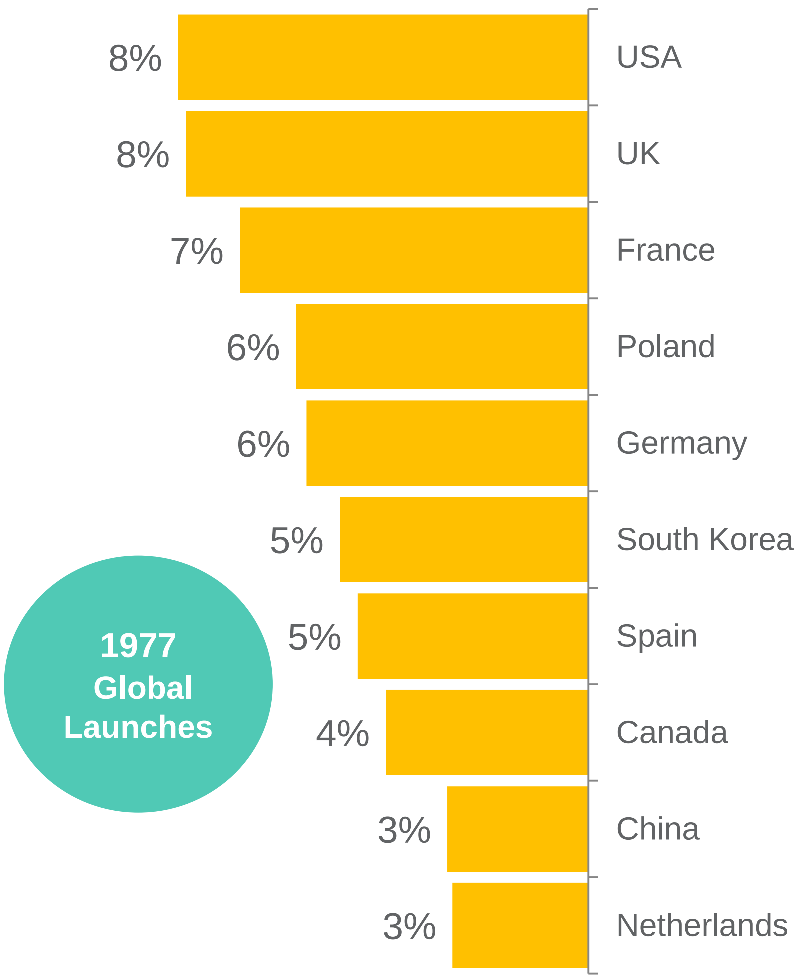
- A total of 1977 products containing carrot as an ingredient were launched globally in the last 3 months, which has decreased since the previous wave (2085 launches).
- There were 33 carrot-containing products launched in Australia in the last quarter. See upcoming pages for examples of Australian launches.
- Europe and the Asia Pacific were the 2 top regions for these product launches (55% and 22% respectively).
- The top pack formats used were flexible formats (28%) and tubs (18%).
- The top categories for product launches were meals (18%), dairy (9%), sauces & seasonings (9%) and juice drinks (8%).
- The top claims used for launches globally were no additives/preservatives (29%), ethical - environmentally friendly (19%) and low/no/reduced allergen (18%).
- The most innovative launch found was carrot vegetable liquor with beta-carotene from France. Examples of these products can be found at the end of the carrot trend report.

Source: Mintel (2016)

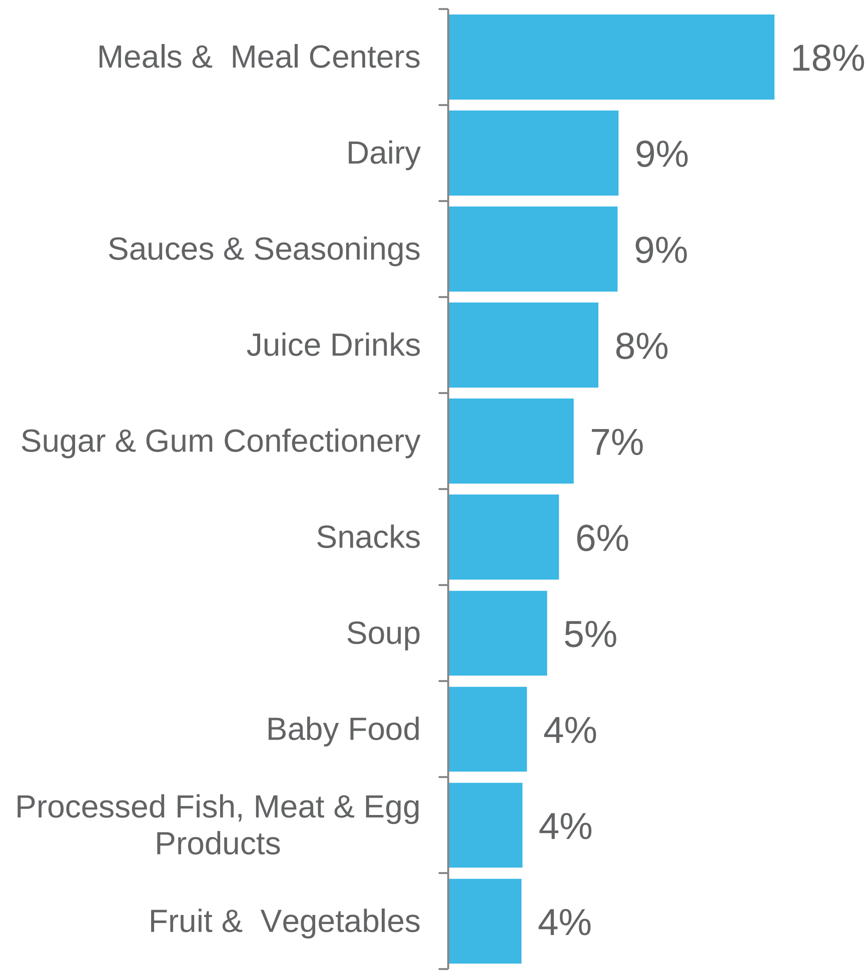
Carrot Launches
Country & Categories

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

Top Launch Countries



Top Launch Categories



Horticulture Innovation Australia colmar brunton.

Carrot Launches

Top Claims & Pack Formats Used

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

Pack Formats Used

Global	Flexible	28%
Global	Tub	18%
Global	Bottle	13%
Europe	Flexible	25%
Europe	Tub	22%
Europe	Bottle	14%
Asia Pacific	Flexible	35%
Asia Pacific	Tub	13%
Asia Pacific	Tray	10%

Top Claims Used

Global	No Additives/Preservatives	29%
Global	Ethical - Environmentally Friendly Package	19%
Global	Low/No/Reduced Allergen	18%
Europe	No Additives/Preservatives	27%
Europe	Ethical - Environmentally Friendly Package	19%
Europe	Microwaveable	16%
Asia Pacific	No Additives/Preservatives	30%
Asia Pacific	Microwaveable	19%
Asia Pacific	Time/Speed	17%

Innovative Carrot Launches:
L3M (July – October 2016)

You and I Orange & Carrot Spa Soap (Thailand)

You and I Orange & Carrot Spa Soap is now available in a newly designed 100g pack. It is designed to aid in the growth of new cells, moisturise, soften and smooth skin, offering a radiant complexion.

Claims:
Brightening / Illuminating*, Moisturising / Hydrating

Morrisons Market St Edamame Bean Stir Fry (UK)

Morrisons Market St Edamame Bean Stir Fry is now available. This product comprises a mix of stir fry vegetable including carrot, broccoli, cabbage, Chinese leaf, onion and pepper with Edamame beans. The product is washed and ready to cook, can be simply woked and served, and provides one of the five a day. It is suitable for vegetarians, and retails in a 320g pack.

Claims:
Vegetarian, Ease of Use

Woolworths Food Easy to Juice Orange Juice Mix (South Africa)

Woolworths Food Easy to Juice Orange Juice Mix features carrot, lemon and ginger. The product is said to be a quick and easy solution for an on-the-go breakfast or an in-between drink. It is vegan suitable and retails in a 720g pack featuring preparation instructions.

Claims:
Vegan, On-the-Go, Time/Speed, Ease of Use, No Animal Ingredients

The Pulp & Press Juice Co. Beta Blaster Cold Pressed Fruit & Vegetable Juice (Canada)

The Pulp & Press Juice Co. Beta Blaster Cold Pressed Fruit & Vegetable Juice is a raw, fresh, organic juice with carrot, lemon, ginger and beet. The non-pasteurized beverage is certified organic by Ecocert Canada and retails in a 355ml pack, featuring the Canada Organic and Ecocert logos.

Claims:
Organic

Source: Mintel (2016)

Innovative Carrot Launches:
L3M (July – October 2016)

Biotta Organic Purple Carrot Juice (Croatia)

Biotta Ekoproizvod Ljubicasta Mrkva Povrtni Sok (Organic Purple Carrot Juice) is recommended to be taken before every meal. This pasteurised vegan product retails in a 500ml bottle featuring a QR code.

Claims:
Organic, Vegan, No Animal Ingredients

AH Verspakket Beetroot Soup Kit (Netherlands)

AH Verspakket Bieten Soep (Beetroot Soup Kit) contains six red beetroots, one apple, two red onions, two garlic cloves, parsley and two vegetable blocks of broth. This gluten-free product retails in a 1350g pack, featuring the Bewuste Keuze (Conscious Choice) logo.

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

Kewpie Five Colour Shake Salad (Thailand)

Kewpie Five Colour Shake Salad is said to be fresh, clean and safe from toxins. It comes with a sachet of salad cream which is halal certified, free from MSG and is 50% reduced in fat and sugar. The product retails in a 130g pack with a 60g sachet of salad cream.

Claims:
No Additives/Preservatives, Low/No/Reduced Fat, Low/No/Reduced Sugar, Halal, Ethical - Environmentally Friendly Product

Pure Bio Energy Drink (France)

Pure Bio Energy Drink is described as an organic, carbonated energy drink with orange, peach and carrot flavours. This vegan and halal certified product contains 32mg of caffeine in 100ml, is free from gluten, artificial preservatives and colours, and retails in a 250ml pack that features the BIO, EU Green Leaf, Austria Bio Garantie and USDA organic logos. This product was on display at SIAL 2016 in Paris, France.

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

Source: Mintel (2016)

Innovative Carrot Launches:
L3M (July – October 2016)

Paul and Pippa Carrot Organic Biscuits (France)

Paul and Pippa Biscuits Bio Gateaux aux Catottes (Carrot Organic Biscuits) are handmade with 100% natural ingredients, including 100% organic extra virgin olive oil. This wholegrain product is natural, fresh and tender, and contains no nuts. The product is USDA organic and CCPAE certified, and retails in a 150g pack featuring the EU Green Leaf, Facebook, Twitter and Instagram logos.

Claims:

All Natural Product, Organic, Wholegrain, Low/No/Reduced Allergen, Social Media

Aureli Mama Carrot Vegetable Liquor with Beta-carotene (France)

Aureli Mama Carrot Vegetable Liquor with Beta-carotene is described as a unique concentrate of vitamins, mineral salts and antioxidants. Its specific colour and flavour are a result of carefully selected 100% natural ingredients, and the liqueur is made with juice from 2kg of carrots. This product retails in a 50cl bottle and was on display at SIAL 2016 in Paris, France.

Claims:

All Natural Product, Antioxidant

Aureli Organic Sweet Carrot Jam (France)

Aureli Organic Sweet Carrot Jam is now available. The product comprises carrot, apple, orange and lemon, and retails in a 320g pack featuring the Green EU Leaf logo. It was on display at SIAL 2016 in Paris, France.

Claims:

Organic

Crispy Natural Cheese & Carrot Crispy Slices with Bell Pepper Seasoning (France)

Crispy Natural Cheese & Carrot Crispy Slices with Bell Pepper Seasoning are neither fried nor baked, and are a source of calcium. This product was made with low fat cheese that contains 20% fat, is a source of fibre, and is high in protein, that along with calcium is necessary for proper bone mass development in children.

Claims:

Low/No/Reduced Fat, Bone Health, High Protein

Source: Mintel (2016)

Top Australian Carrot Launches:
L3M (July – October 2016)

Coles Mini Christmas Pudding

Latina Fresh Lasagne with Angus Beef & Vegetables

Chicken Tonight Classic Honey & Mustard Sauce with Carrot & Onion

Rafferty's Garden Vegetable Risotto with Prebiotic Fibre Happy Tummies

Proud & Punch Turn Up Beet Frozen Juice Pops with Granny Smith Apple, Beetroot, Carrot & Ginger

The Happy Sol Food Company Super + Reds Antioxidant Blend

Perfecto Tasty BBQ Chicken Kebabs

The Real Hotpot Tuscan Style Chicken

The Real Mash Vegetable Mash

Moo Boysenberry & Super Acai Yoghurt

On The Menu Pub Favourites Slow Cooked Lamb

Lean Cuisine Pots of Goodness Spanish Chicken

Source: Mintel (2016)

Cauliflower.

Purchase and consumption of cauliflower is slightly higher than previous waves.

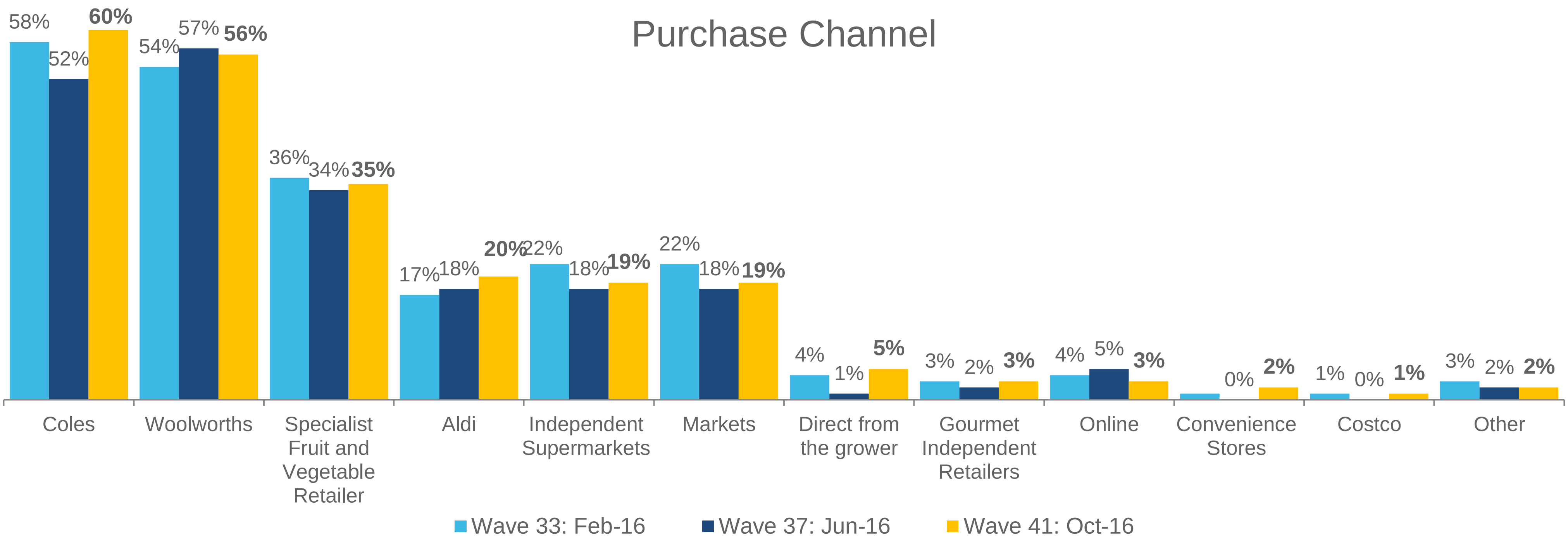
Cauliflower is typically purchased from mainstream retailers, whilst purchase from Aldi continues to increase.

Average Purchase **3.5** times per month

▼ 3.3 times, Wave 33
▼ 3.4 times, Wave 37

Average Consumption **8.3** times per month

▼ 8.2 times, Wave 33
▼ 8.0 times, Wave 37



Q1. On average, how often do you purchase cauliflower?
Q2. On average, how often do you consume cauliflower?
Q5. From which of the following channels do you typically purchase cauliflower?
Sample Wave 33 N=301, Wave 37 N=304, Wave 41 N=301

Horticulture Innovation Australia

colmar brunton.

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

Average Spend and Price Sensitivity

Average weight of purchase

The typical consumer purchases **1.0kg** of cauliflower, relatively consistent with past months.

— 1.0kg, Wave 33
▼ 0.9kg, Wave 37

Recalled last spend

Recalled last spend on cauliflower is **$3.70,** slightly higher than previous waves.

▼ $3.40, Wave 33
▼ $3.50, Wave 37

Value for money

Consumers perceive cauliflower to be good value for money **(6.6/10)**, which has continued to increase over the last three waves.

▼ 5.9/10, Wave 33
▼ 6.2/10, Wave 37

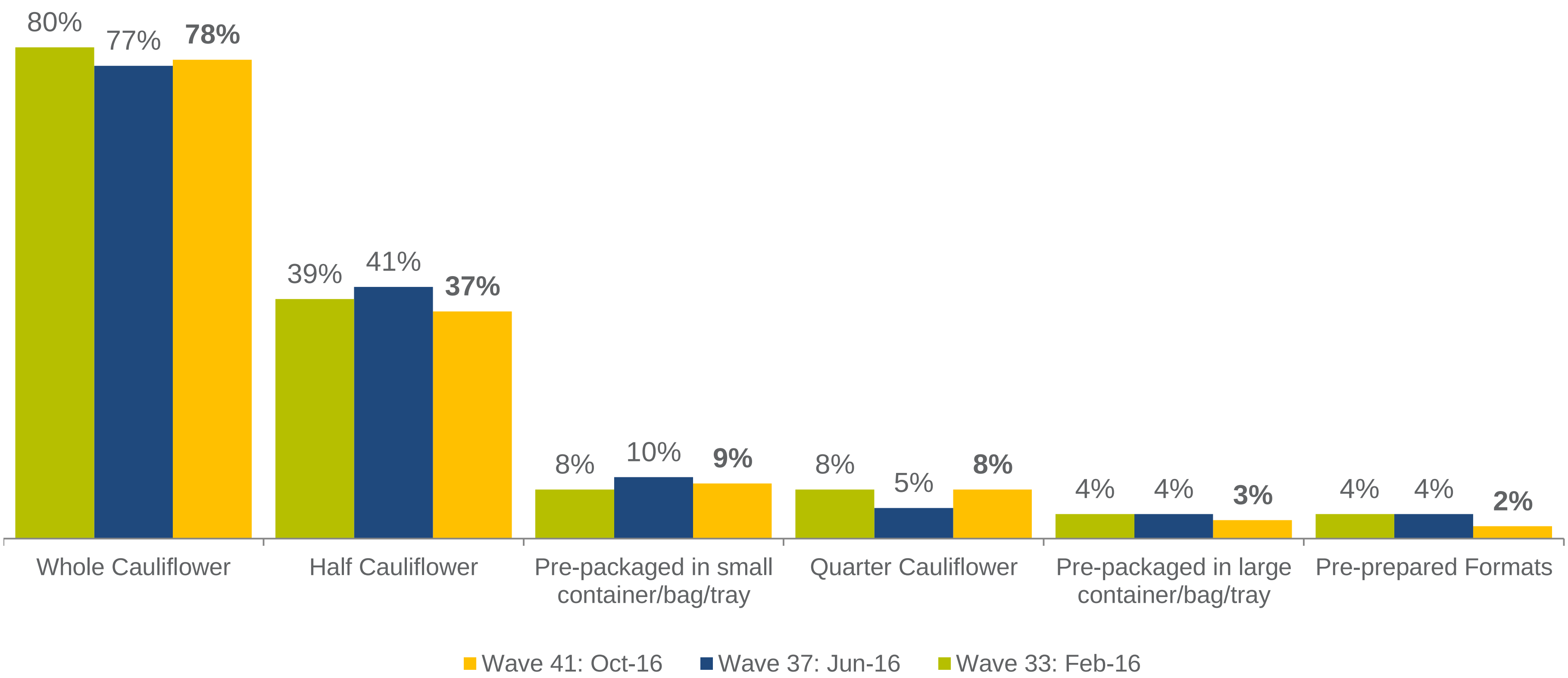
Q3. How much cauliflower do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? 0-10 scale
Sample Wave 33 N=301, Wave 37 N=304, Wave 41 N=301

Horticulture Innovation Australia

colmar brunton.

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

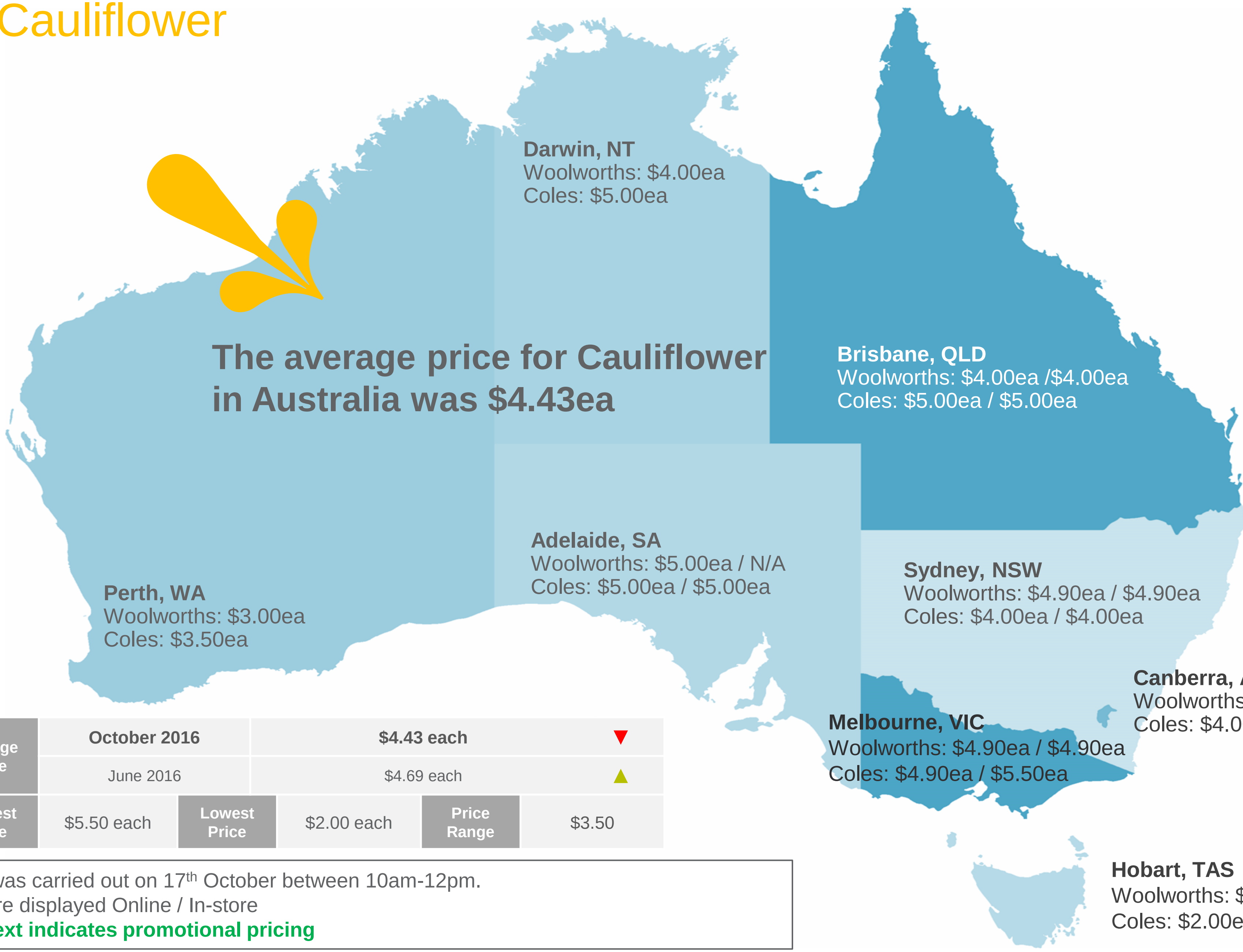
Whole heads of cauliflower continue to be the main format purchased, with half cauliflowers also a popular format option. Pre-packaged products only make up a small portion of the formats purchased.



Q4b. In what fresh formats do you typically purchase cauliflower?
Sample Wave 33 N=301, Wave 37 N=304, Wave 41 N=301

Online and In-store Commodity Prices

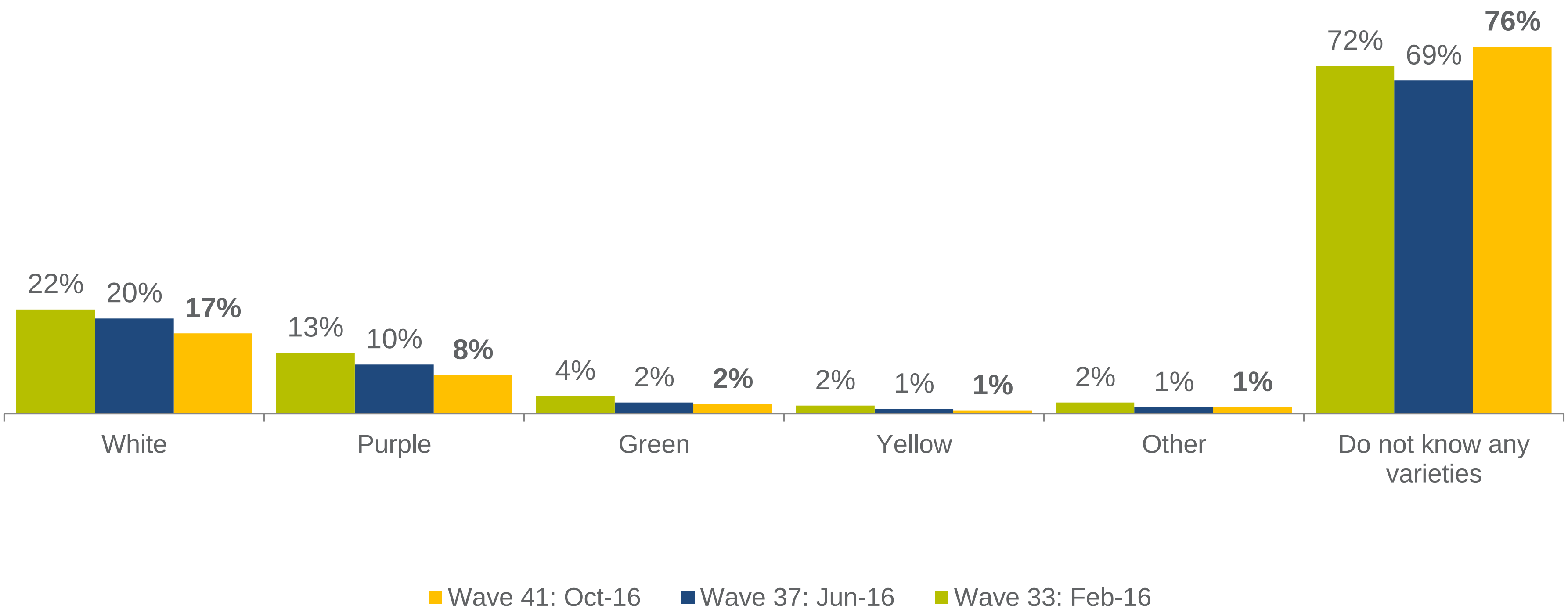
Cauliflower



Average Price	October 2016		$4.43 each ▼		
	June 2016		$4.69 each ▲		
Highest Price	$5.50 each	Lowest Price	$2.00 each	Price Range	$3.50

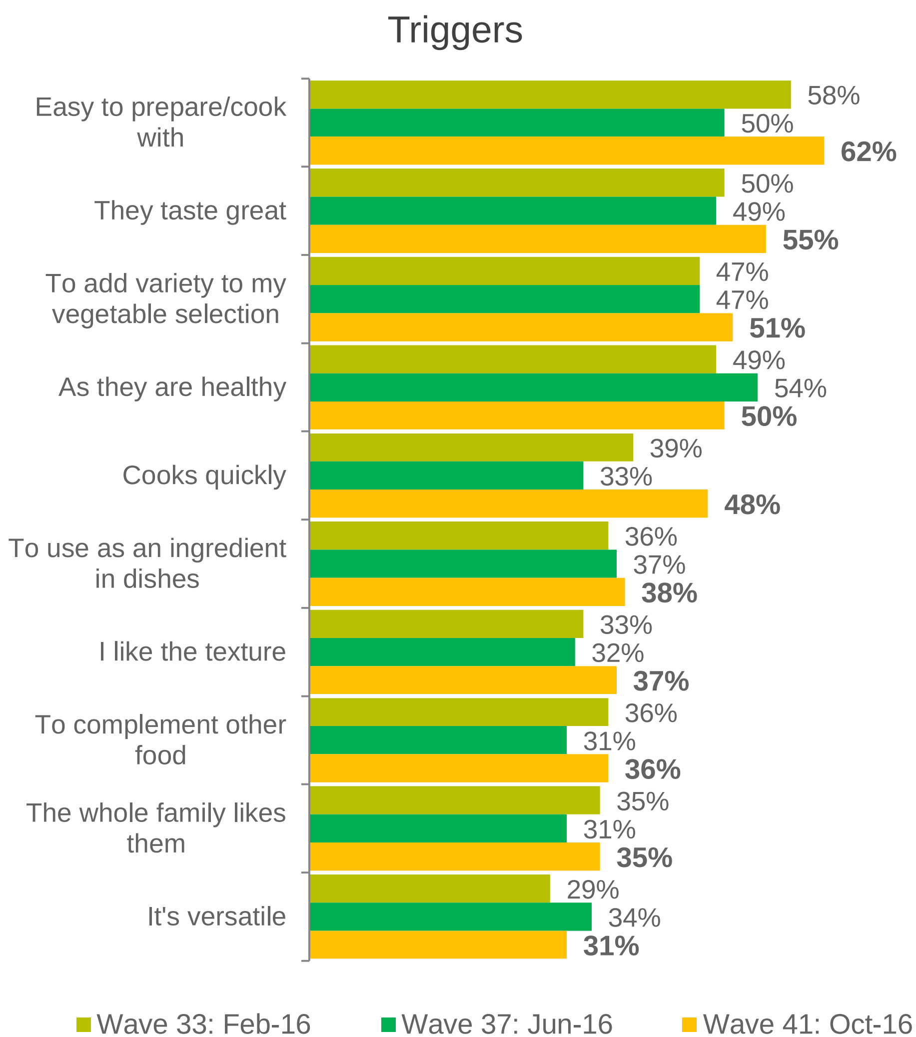
Pricing was carried out on 17th October between 10am-12pm.
Prices are displayed Online / In-store
Green text indicates promotional pricing

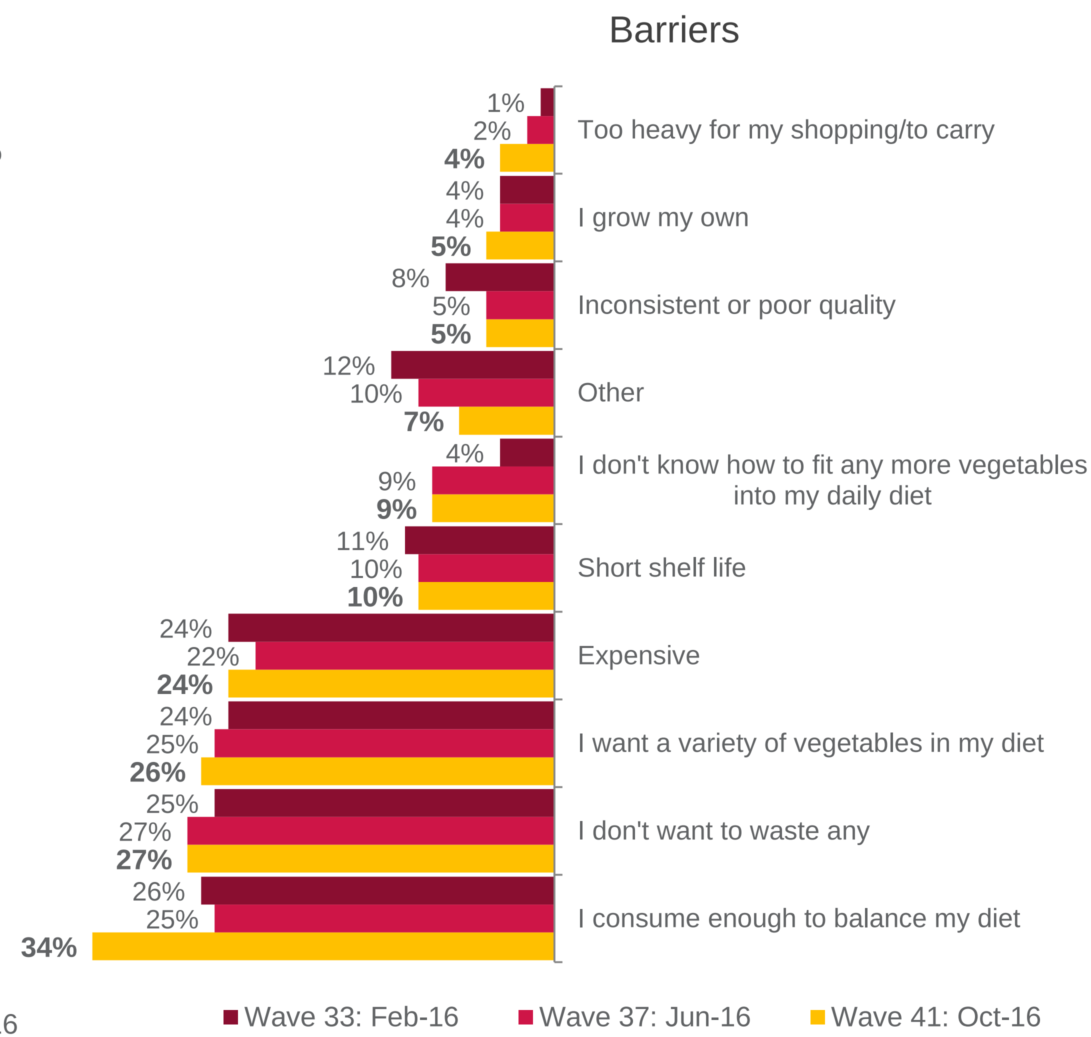
Spontaneous awareness remains very low, with approximately three quarters of consumers unable to recall a type of cauliflower. Consumers are most likely to recall white and purple as the main cauliflower varieties.



Q6a. What varieties of cauliflower are you aware of? (unprompted)
Sample Wave 33 N=301, Wave 37 N=304, Wave 41 N=301

Ease of preparation and taste are the primary influences on purchase. Already consuming enough and not wanting to waste any are the key barriers inhibiting purchase. There has been a significant increase in cooking quickly as a reason to purchase cauliflower this wave.





Q7. Which of the following reasons best describes why you purchase cauliflower?
Q8. Which reason best describes why you don't buy cauliflower more often?
Sample Wave 33 N=301, Wave 37 N=304, Wave 41 N=301

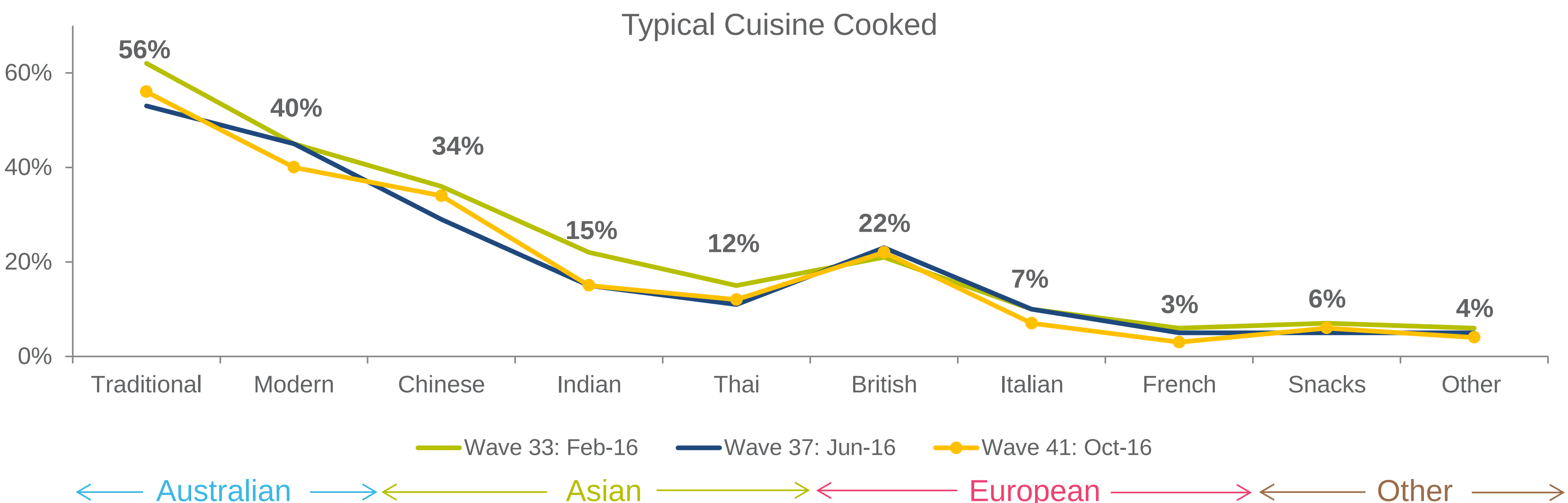
Consumers prefer to cook cauliflower in Australian and Asian cuisine. Dinners and family meals are the key meal occasions.

Top 5 Consumption Occasions

	Wave 37	Wave 41
Dinner	74%	**74%**
Family meals	57%	**57%**
Weekday meals	44%	**50%**
Weekend meals	36%	**43%**
Quick Meals	24%	**29%**

13% used cauliflower when cooking a new recipe

13%, Wave 37



Q10. What cuisines do you cook/consume that use cauliflower?
Q11. Which of the following occasions do you typically consume/use cauliflower?
Sample Wave 33 N=301, Wave 37 N=304, Wave 41 N=301

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

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

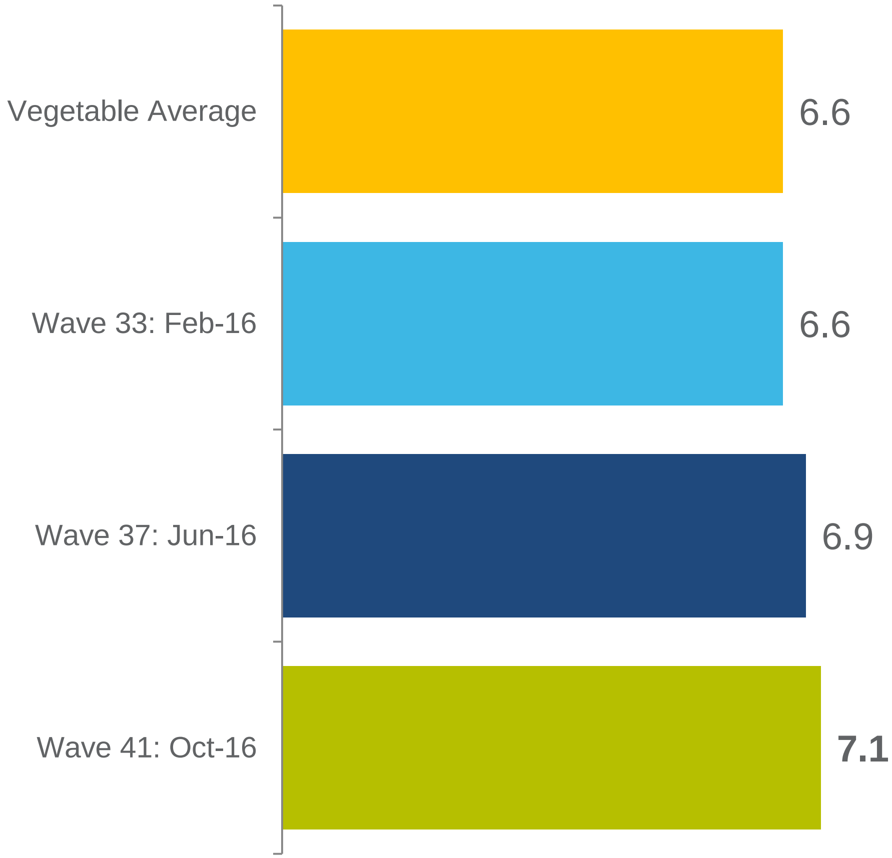
Accompanying Vegetables

Potato	60% ▲
Carrot	59% ▲
Broccoli	47% –
Pumpkin	34% ▲
Beans	29% ▲

Top 10 Cooking Styles			
	Wave 33	Wave 37	**Wave 41**
Steaming	62%	54%	**50%**
Stir frying	50%	36%	**42%**
Boiling	42%	41%	**41%**
Microwave	25%	17%	**26%**
Soup	31%	26%	**24%**
Baking	23%	18%	**21%**
Slow Cooking	13%	9%	**14%**
Roasting	20%	16%	**13%**
Sautéing	7%	10%	**13%**
Raw	17%	8%	**12%**

Q9. How do you typically cook cauliflower?
Q10a. And when are you serving cauliflower which of the following do you also serve together with this?
Sample Wave 33 N=301, Wave 37 N=304, Wave 41 N=301

Importance of cauliflower provenance has steadily increased over the last three waves. Knowing that cauliflower is grown in Australia remains the most important provenance information to consumers.



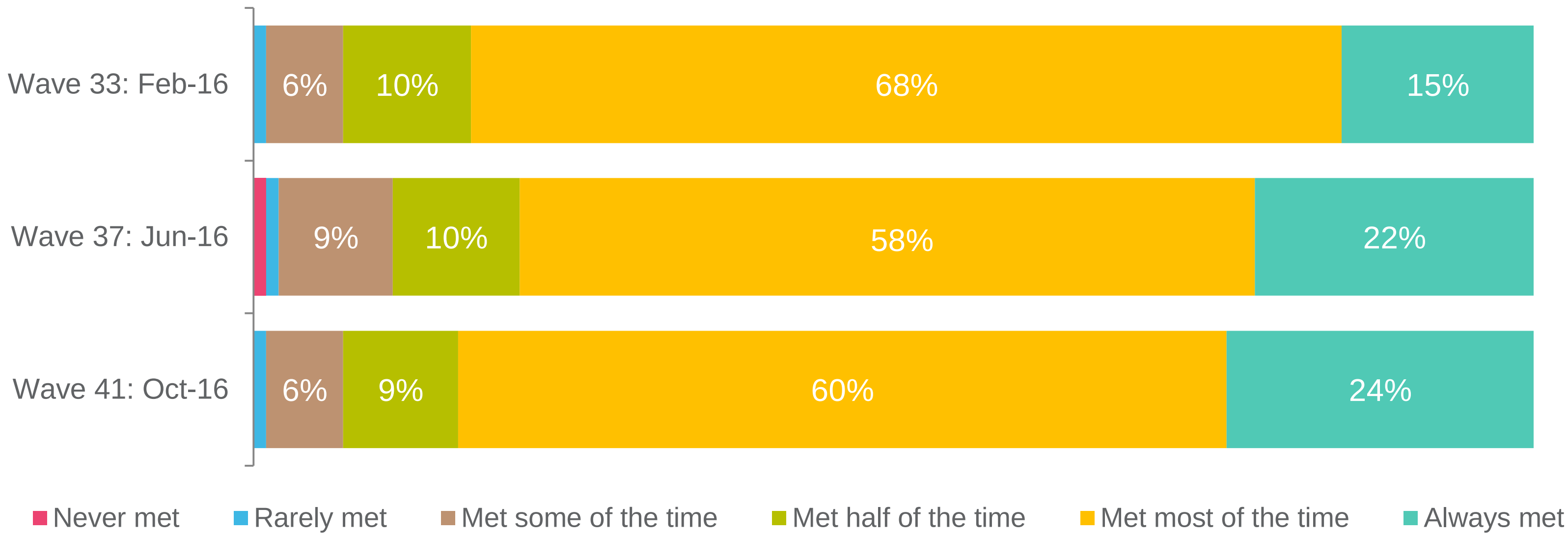
Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 33 N=301, Wave 37 N=304, Wave 41 N=301

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

Expected to stay fresh for **9.4** days

▼ 8.3 days, Wave 33
▼ 9.2 days, Wave 37

Expectations Met



Q12. How long do you expect cauliflower to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy cauliflower?
Sample Wave 33 N=301, Wave 37 N=304, Wave 41 N=301

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

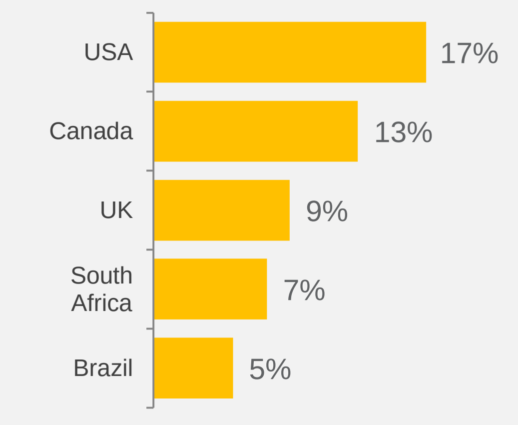
Cauliflower Product Launch Trends.

Cauliflower Global NPDs

July – October 2016

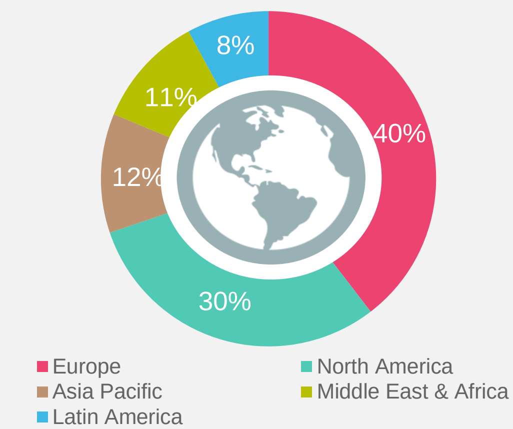
There were 139 products launched in the past three months that contained cauliflower. Europe and North America were the main regions for launches, with USA and Canada the key countries. Flexible packaging remained the most common format. Launches were predominately in fruit and vegetable, sauces and meal categories.

Country

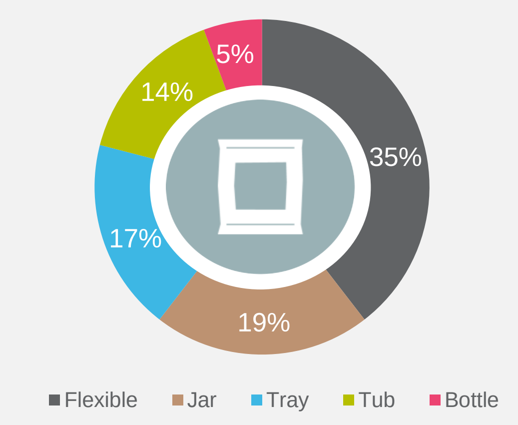


139 Global NPDs

Region



Top Pack Formats



Categories

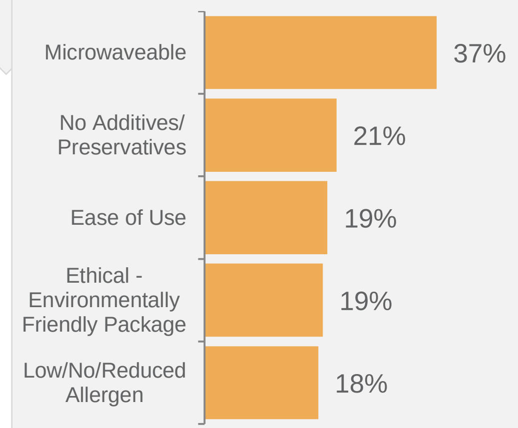
Fruit & Vegetables 38%

Sauces & Seasonings 19%

Meals 19%

Juice Drinks 6%

Top Claims



Cauliflower Product Launches:
Last 3 Months (July – October 2016)
Summary

- There were 139 products launched over the past 3 months that contained cauliflower as an ingredient, relatively consistent with the previous wave.
- There was one cauliflower product launched in Australia in the past three months.
- Product launches were primarily in Europe (40%) and North America (30%), with USA and Canada the key launch countries.
- Flexible (35%), jar (19%), and tray (17%) packaging were the top 3 pack formats.
- The top categories for launches were fruit and vegetables (38%), sauces and seasonings (19%), and meals and meal centers (19%).
- Claims typically used on products included microwaveable (37%), no additives/preservatives (21%), and ease of use (19%).
- The most innovative cauliflower launch this wave was quinoa & cauliflower couscous from the UK. See following pages for examples of product launches.

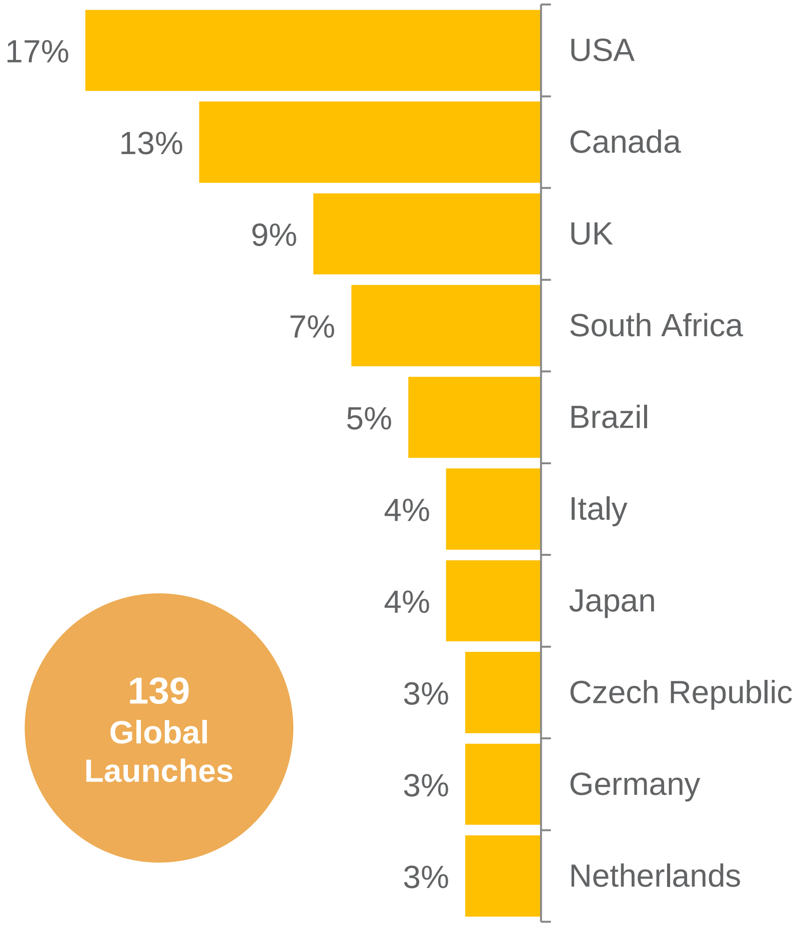
Source: Mintel (2016)

Cauliflower Launches

Country, Region & Categories

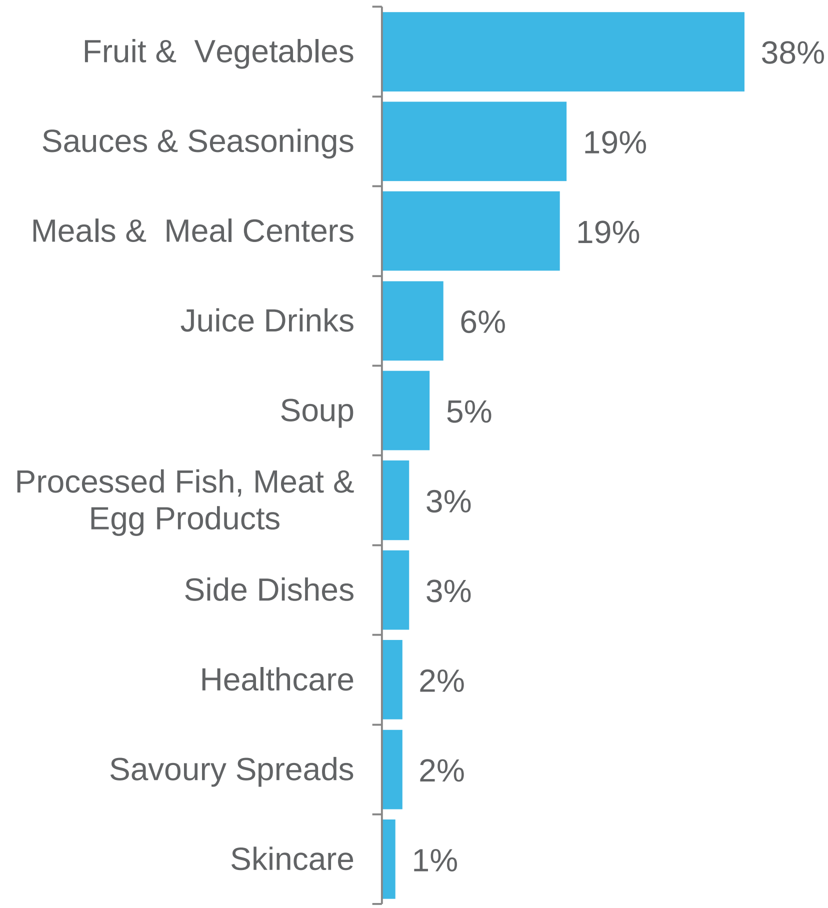
- The three key countries for cauliflower launches and innovation were USA, Canada and the UK.
- Products containing cauliflower were launched across multiple categories including fruit and vegetables, sauces and meals.

Top Launch Countries



139 Global Launches

Top Launch Categories



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colmar brunton.

Cauliflower Launches
Top Claims & Pack Formats Used

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

Pack Formats Used

Global	Flexible	35%
	Jar	19%
	Tray	17%
Europe	Flexible	44%
	Tub	15%
	Tray	15%
North America	Flexible	38%
	Tray	24%
	Jar	12%

Top Claims Used

Global	Microwaveable	37%
	No Additives/Preservatives	21%
	Ease of Use	19%
Europe	Microwaveable	40%
	No Additives/Preservatives	22%
	Ethical - Environmentally Friendly Package	20%
North America	Microwaveable	48%
	Low/No/Reduced Allergen	31%
	Gluten-Free	29%

Innovative Cauliflower Launches:
L3M (July – October 2016)

Conad Verso Natura Bio Organic Vegetable Mix for Minestrone (Italy)

Conad Verso Natura Bio Minestrone (Organic Vegetable Mix for Minestrone) comprises 12 100% Italian vegetables from organic farming. The vegetables are harvested, processed and fresh frozen to maintain their nutritional properties. The product retails in a 450g pack featuring the EU Green Leaf logo.

Claims:
Organic, Ethical - Environmentally Friendly Product

Healthy Choice Gourmet Steamers Beef Teriyaki (Canada)

Healthy Choice Gourmet Steamers Beef Teriyaki has been packaged in a newly redesigned recyclable 283g pack bearing the Facebook logo. The US inspected and passed product is made with rice, vegetables and water chestnuts in a sweet teriyaki sauce and is said to have a fresh taste unlocked by steam. The microwaveable product is a source of iron, is high in fibre, and contains no preservatives.

Claims:
No Additives/Preservatives, High/Added Fiber, Microwaveable, Ethical - Environmentally Friendly Package, Social Media

Uni-President Natural Organic Frozen Cauliflower (Taiwan)

Uni-President Natural Organic Frozen Cauliflower is selected, washed, cut, pre-cooked and processed according to an instant freezing process to retain the original flavour and nutrients of the vegetables. This USDA Organic certified product is easy to cook and retails in a 250g pack.

Claims:
Organic, Ease of Use

Jumbo Jamie Oliver 'Spiced' Cauliflower Soup (Netherlands)

Jumbo Jamie Oliver 'Spiced' Bloemkool Soep ('Spiced' Cauliflower Soup) is now available. It is a mix of chopped cauliflower, onion, yellow carrot, garlic, parsley and broth. The product retails in a 500g pack bearing Bewuste Keuze (Concious Choice) logo.

Claims:
N/A

Source: Mintel (2016)

Innovative Cauliflower Launches:
L3M (July – October 2016)

Sainsbury's Deliciously Freefrom Beef Lasagne (UK)

Sainsbury's Deliciously Freefrom Beef Lasagne is created with care for customers with food allergies and intolerances. This microwavable meal comprises minced British beef and tomato ragú, layered between sheets of Freefrom pasta, topped with a milk free béchamel sauce and grated cheddar-style coconut based alternative for cheese. The product is free from milk, wheat and gluten and retails in a 400g partly recyclable pack.

Claims:
Microwaveable, Gluten-Free, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Package

Asda Grower's Selection Layered Veg with Wild Garlic Butter (UK)

Asda Grower's Selection Layered Veg with Wild Garlic Butter comprises a vibrant medley of broccoli, cauliflower, carrots and spring greens in a wild garlic butter. This microwaveable product is suitable for vegetarians, contains no artificial colours, flavours or hydrogenated fat, and retails in a 220g partly recyclable pack.

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

Taylor Farms Cauliflower Pearls (USA)

Taylor Farms Cauliflower Pearls are now available. This washed and ready-to-enjoy product is described as the better way to mash, but can also be used in rice, sautéed and baked. It is free from gluten and preservatives, can be microwaved, and is said to steam in the bag. The product is kosher certified and retails in a 16-oz. pack featuring simple recipes and Facebook information.

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

Soupesoup Cauliflower & Cheddar Soup with Broccoli Flowers (Canada)

Soupesoup Cauliflower & Cheddar Soup with Broccoli Flowers is described as a quick and healthy meal. It is free from gluten, preservatives, artificial colours or flavours. The microwavable product retails in a 625ml pack.

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

Source: Mintel (2016)

Innovative Cauliflower Launches:

L3M (July – October 2016)

Cottin Tavola Steamed Cabbage Trio (Italy)

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

Claims:
No Additives/Preservatives, Microwaveable, Time/Speed

Woolworths Food Easy to Cook Butternut, Baby Marrow Spaghetti with Cauliflower Florets (South Africa)

Woolworths Food Easy To Cook Butternut, Baby Marrow Spaghetti with Cauliflower Florets are ideal to be microwaved or fried in a pan. The product is suitable for vegetarians, comprises a herb butter, and retails in a partly recyclable 255g pack, that features cooking instructions.

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

Let's Cook Cauliflower & Parsley Rice (UK)

Let's Cook Cauliflower & Parsley Rice is described as a great alternative to traditional rice and couscous, and comprises chopped cauliflower with parsley. The microwavable product provides one of the five recommended daily vegetable and fruit portions per 80g serving, and retails in a 250g partly recyclable pack.

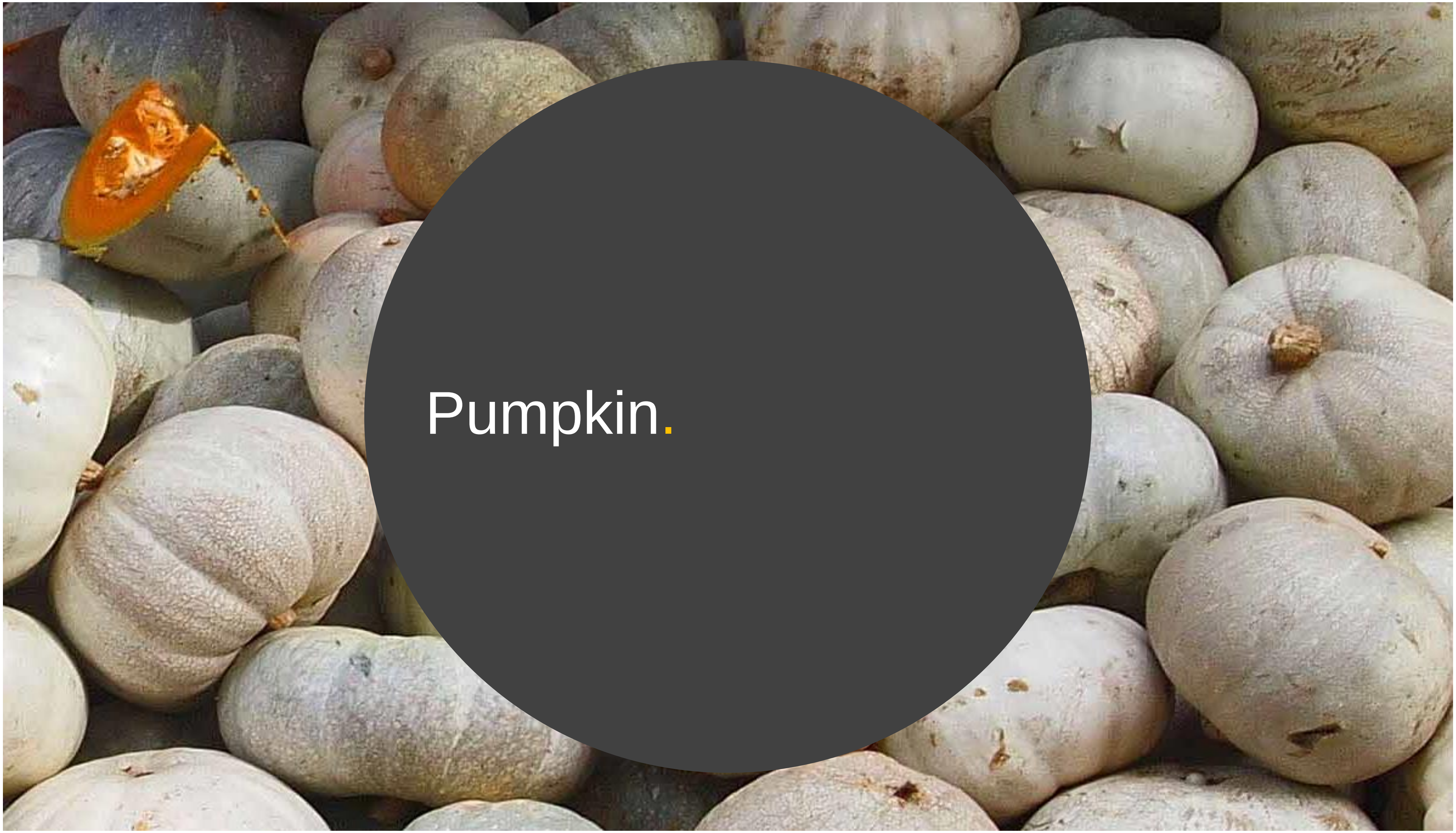
Claims:
Microwaveable, Ethical - Environmentally Friendly Package

Tesco Quinoa & Cauliflower Couscous (UK)

Tesco Quinoa & Cauliflower Couscous is a blend of red rice, quinoa grain, cauliflower couscous and vegetables with a citrus dressing. It is suitable for vegetarians and retails in a 180g pack.

Claims:
Vegetarian

Source: Mintel (2016)



Pumpkin.

Average purchase remained stable this wave, whilst consumption slightly increased.

Pumpkin is generally purchased from mainstream retailers. This wave sees an increasing trend in purchase from markets.

Average Purchase **3.2** times per month

▼ 3.1 times, Wave 33

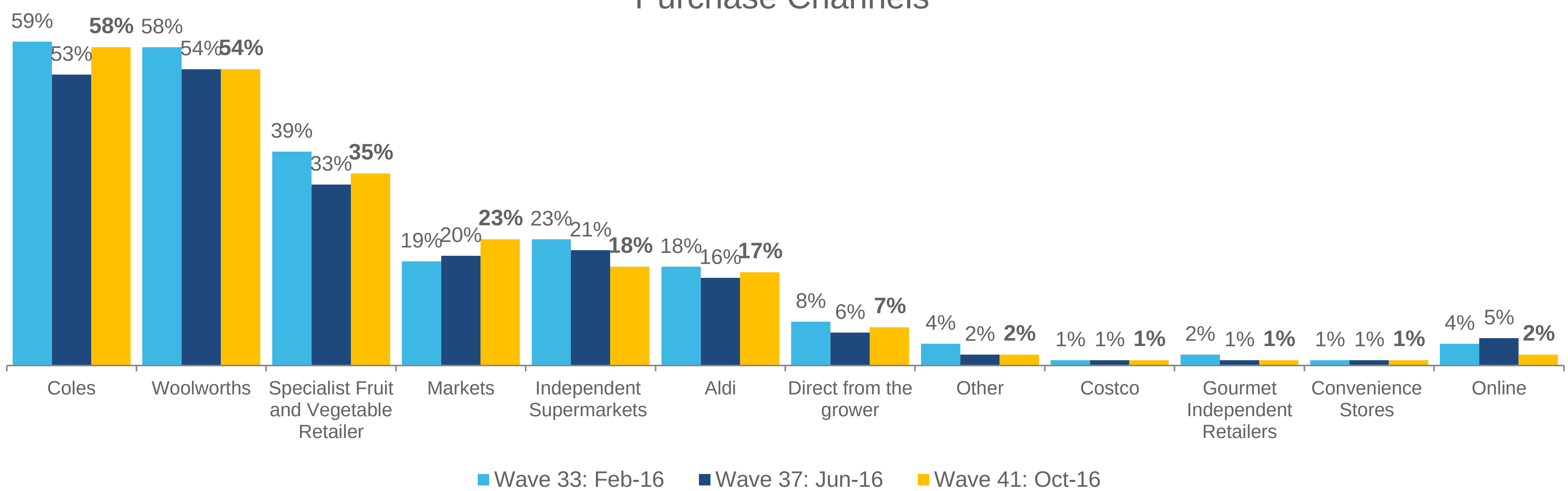
— 3.2 times, Wave 37

Average Consumption **8.8** times per month

— 8.8 times, Wave 33

▲ 9.1 times, Wave 37

Purchase Channels



Q1. On average, how often do you purchase pumpkin?
Q2. On average, how often do you consume pumpkin?
Q5. From which of the following channels do you typically purchase pumpkin?
Sample Wave 33 N=304, Wave 37 N=302, Wave 41 N=302

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

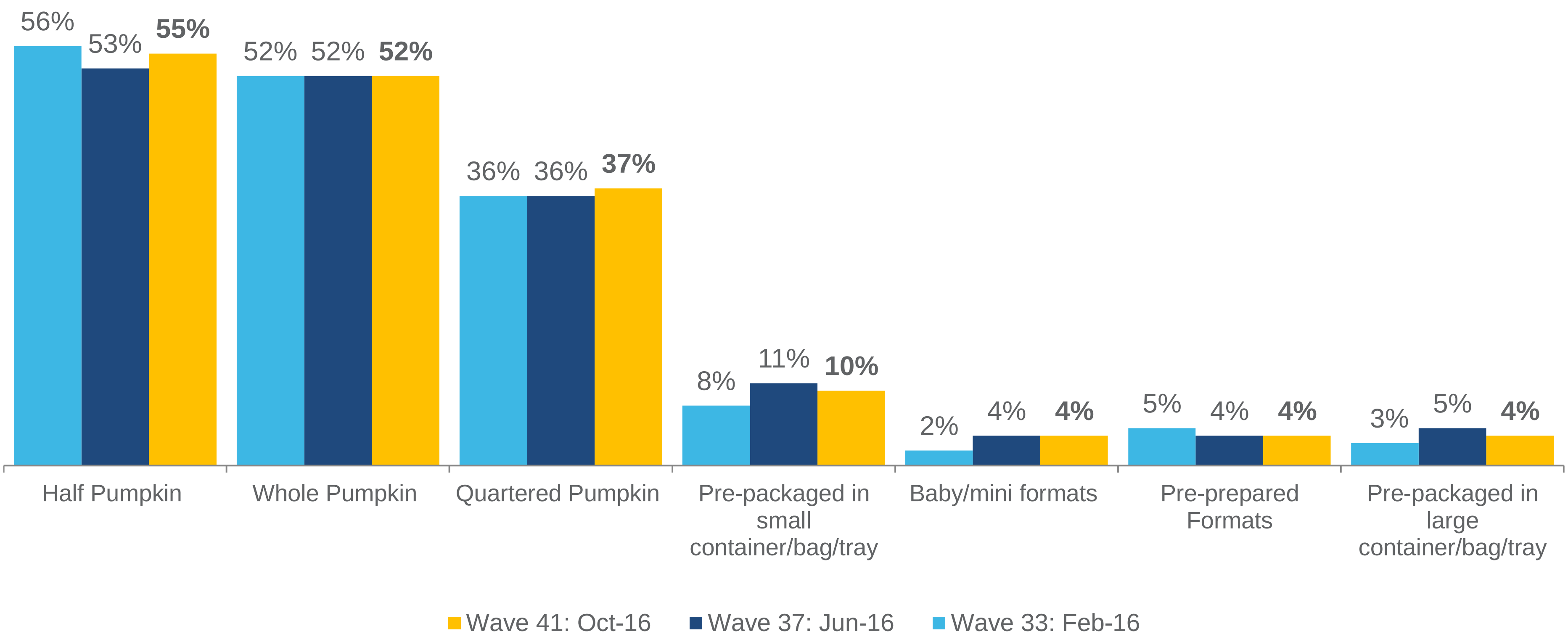
Average Spend and Price Sensitivity

Average weight of purchase	Recalled last spend	Value for money
The average consumer typically purchases **1.4kg** of pumpkin, slightly higher than the previous wave.	Recalled last spend on pumpkin is **$3.10**, marginally declining this wave.	Consumers perceived pumpkin as good value for money **(7.1/10)**, which has continued to increase this wave.
▼ 1.3kg, Wave 33	▲ $3.20, Wave 29	▼ 6.6/10, Wave 33
▼ 1.3kg, Wave 37	▲ $3.20, Wave 37	▼ 7.0/10, Wave 37

Q3. How much pumpkin do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 33 N=304, Wave 37 N=302, Wave 41 N=302

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

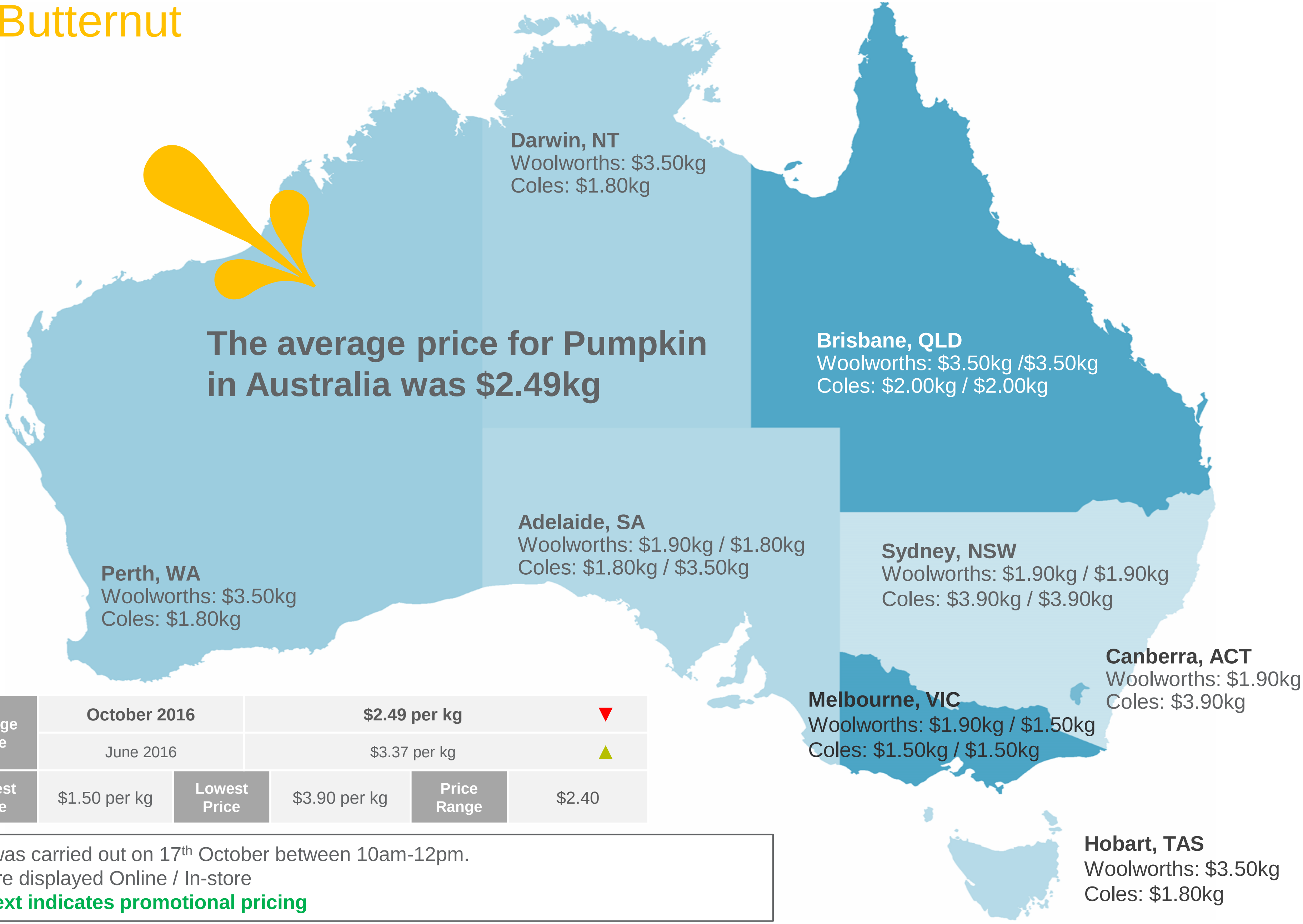
Half and whole pumpkins are the most commonly purchased format. Quartered pumpkins are also popular, with pre-packaged formats only making up a small proportion of purchases.



Q4b. In what fresh formats do you typically purchase Pumpkin?
Sample Wave 33 N=304, Wave 37 N=302, Wave 41 N=302

Online and In-store Commodity Prices

Butternut

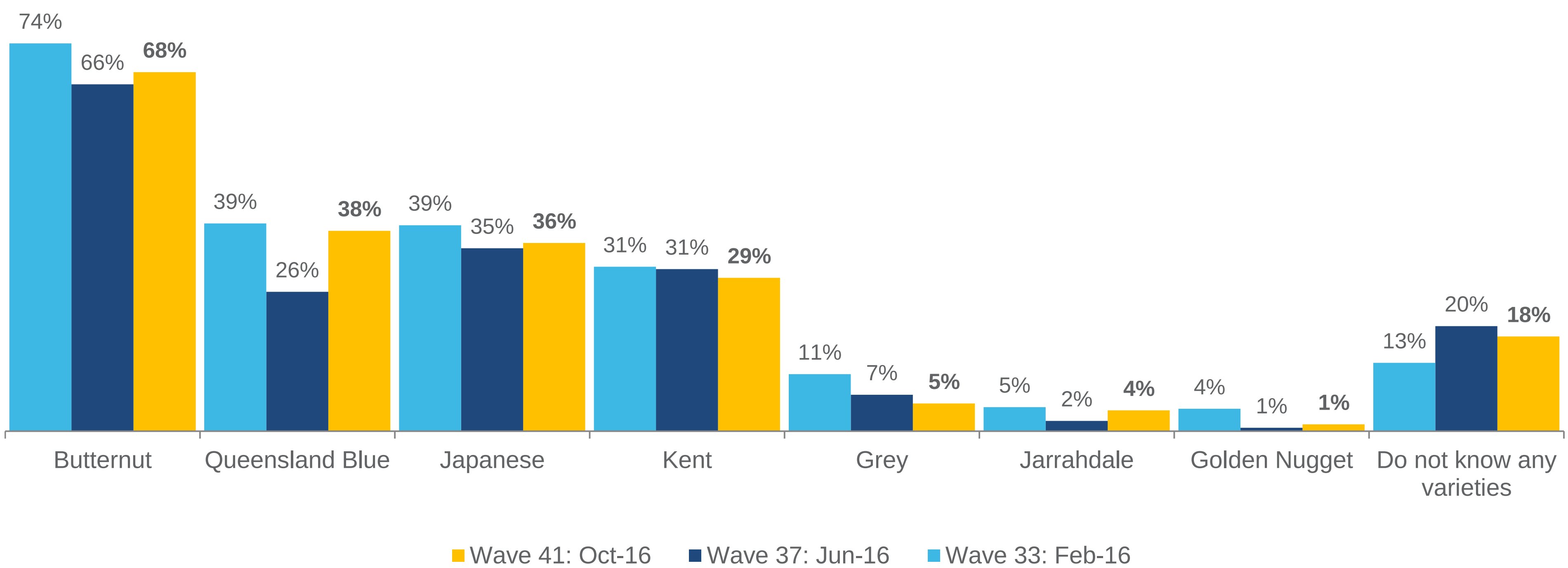


The average price for Pumpkin in Australia was $2.49kg

Average Price	**October 2016**	**$2.49 per kg** ▼			
	June 2016	$3.37 per kg ▲			
Highest Price	$1.50 per kg	**Lowest Price**	$3.90 per kg	**Price Range**	$2.40

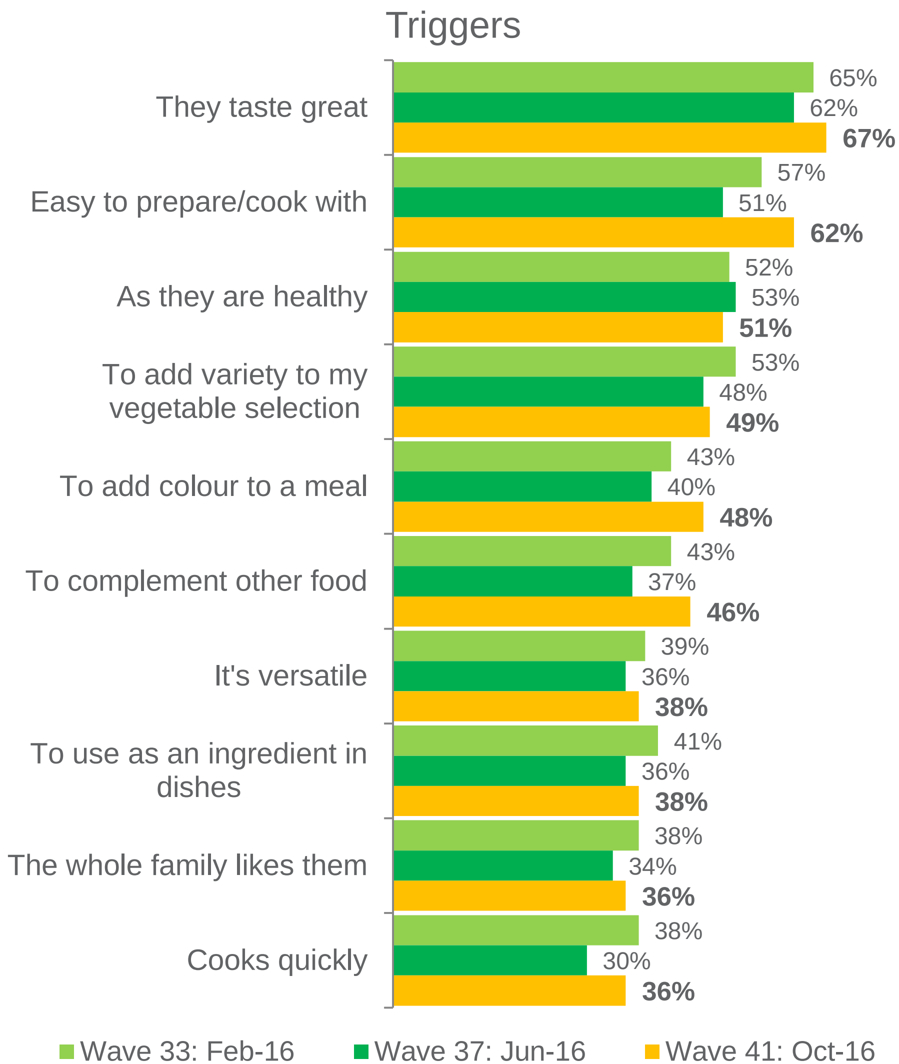
Pricing was carried out on 17th October between 10am-12pm.
Prices are displayed Online / In-store
Green text indicates promotional pricing

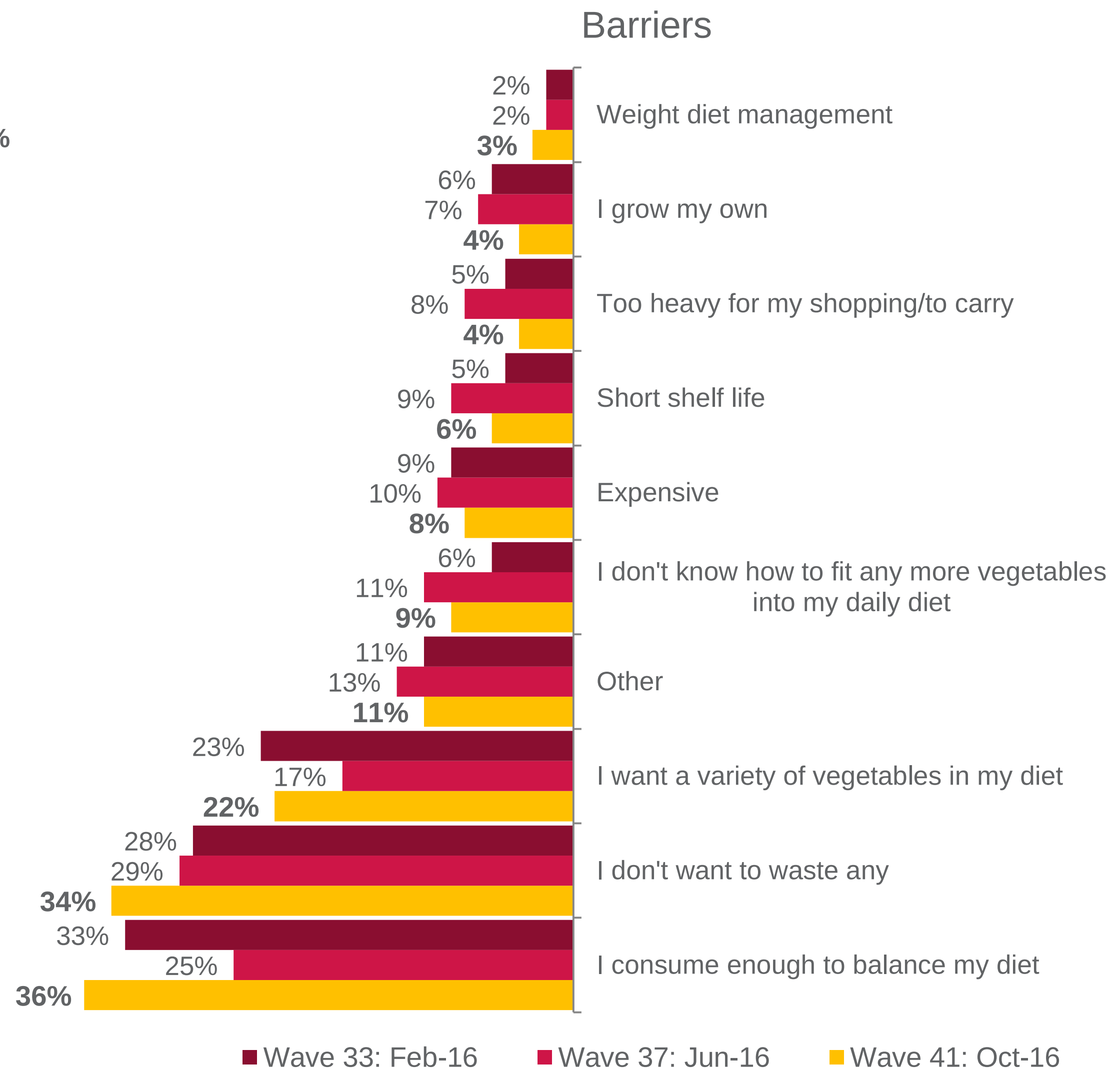
Consistent with past waves, spontaneous awareness of pumpkin types remains high. Butternut, Queensland Blue, Japanese and Kent varieties have the highest level of recall.



Q6a. What varieties of pumpkin are you aware of? (unprompted)
Sample Wave 33 N=304, Wave 37 N=302, Wave 41 N=302

Taste and ease of preparation are the key drivers of pumpkin purchase this wave. Already consuming enough and not wanting to waste any are the main barriers to purchase.





Q7. Which of the following reasons best describes why you purchase pumpkin?
Q8. Which reason best describes why you don't buy pumpkin more often?
Sample Wave 33 N=304, Wave 37 N=302, Wave 41 N=302

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

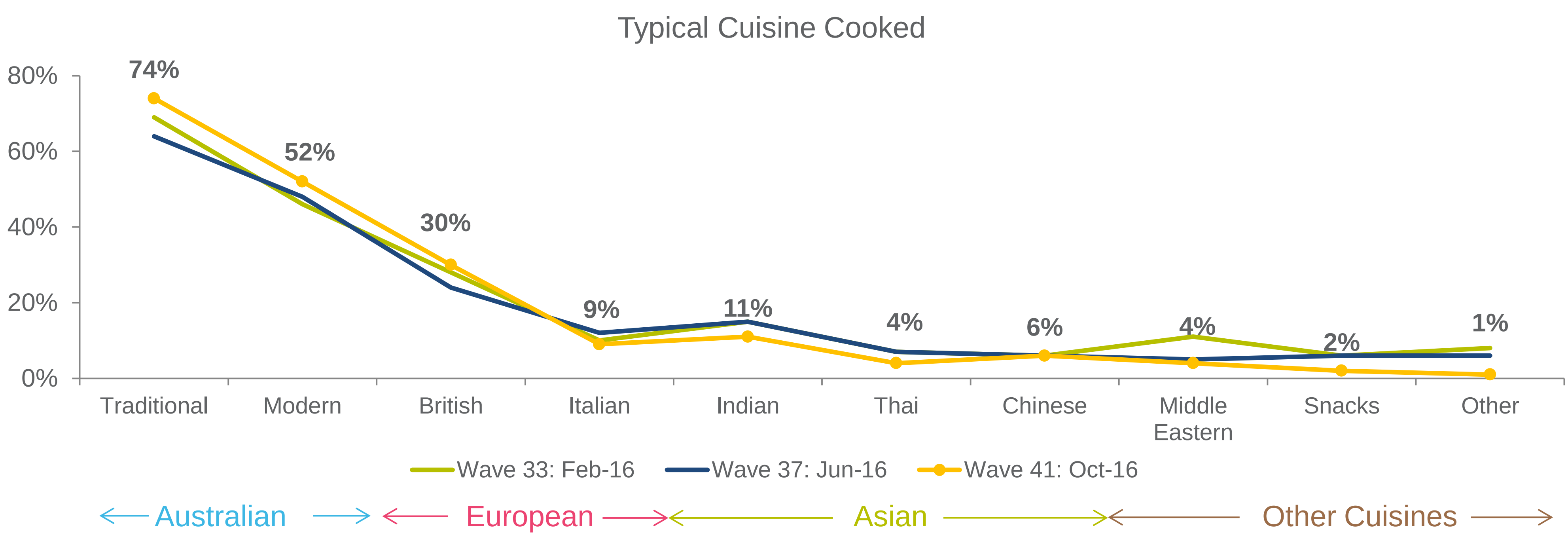
Meal occasions generally occur at dinner time and for family meals.

Top 5 Consumption Occasions

	Wave 37	Wave 41
Dinner	75%	**79%**
Family meals	63%	**63%**
Weekday meals	44%	**56%**
Weekend meals	40%	**54%**
Quick Meals	22%	**25%**

13% used pumpkin when cooking a new recipe

▲ 16%, Wave 37



Q10. What cuisines do you cook/consume that use pumpkin?
Q11. Which of the following occasions do you typically consume/use pumpkin?
Sample Wave 33 N=304, Wave 37 N=302, Wave 41 N=302

Horticulture Innovation Australia

colmar brunton.

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

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

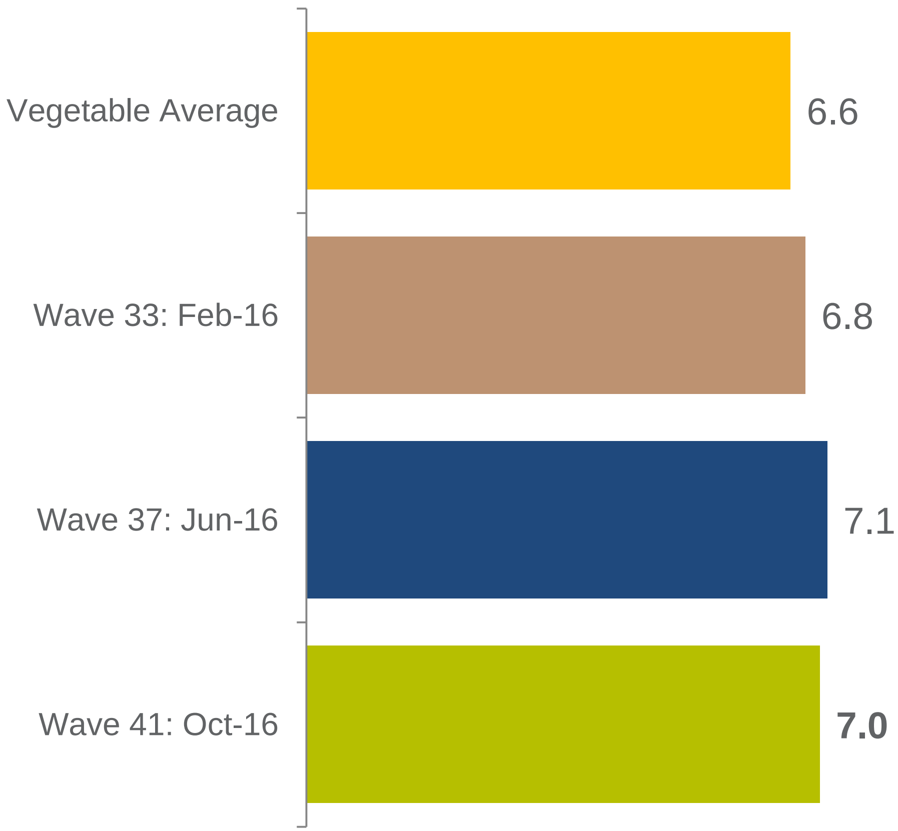
Accompanying Vegetables

- Potato 84% ▲
- Carrot 56% ▼
- Broccoli 41% –
- Cauliflower 41% ▲
- Sweet Potato 41% ▲

Top 10 Cooking Styles			
	Wave 33	Wave 37	Wave 41
Roasting	77%	69%	**70%**
Soup	54%	52%	**54%**
Baking	46%	42%	**53%**
Mashing	52%	47%	**48%**
Boiling	38%	37%	**39%**
Steaming	38%	31%	**37%**
Microwave	14%	13%	**17%**
Slow Cooking	19%	17%	**15%**
Stir frying	10%	10%	**10%**
Frying	9%	13%	**7%**

Q9. How do you typically cook pumpkin?
Q10a. And when are you serving pumpkin which of the following do you also serve together with this?
Sample Wave 33 N=304, Wave 37 N=302, Wave 41 N=302

Pumpkin provenance has marginally declined this wave. Knowing their pumpkins are Australian grown remains the most important provenance information.



8.3 ▲

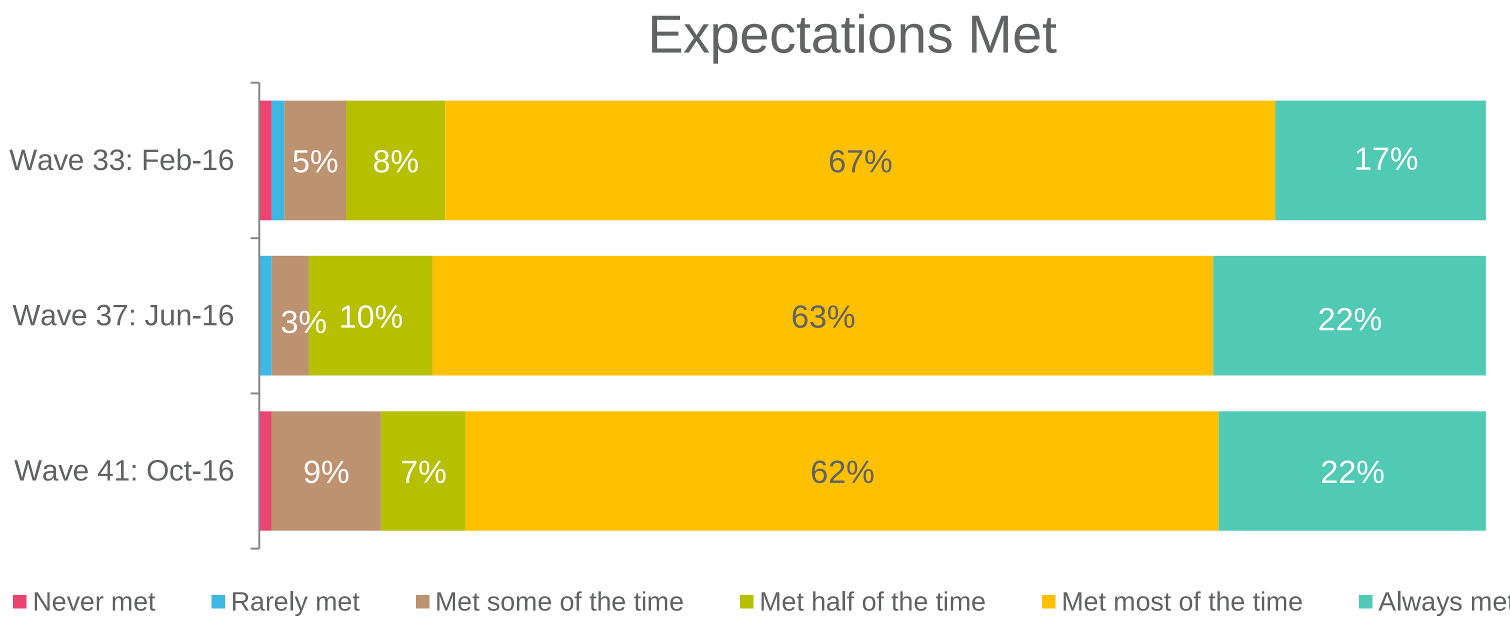
Wave 37: **8.2**

Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 33 N=304, Wave 37 N=302, Wave 41 N=302

Pumpkins are expected to stay fresh for 12 days once purchased. Freshness expectations of pumpkin remain consistent with the previous wave, generally being met at least most of the time.

Expected to stay fresh for **12.4** days

▼ 11.9 days, Wave 33
▲ 12.5 days, Wave 37



Q12. How long do you expect pumpkin to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy pumpkin?
Sample Wave 33 N=304, Wave 37 N=302, Wave 41 N=302

Horticulture Innovation Australia

colmar brunton.

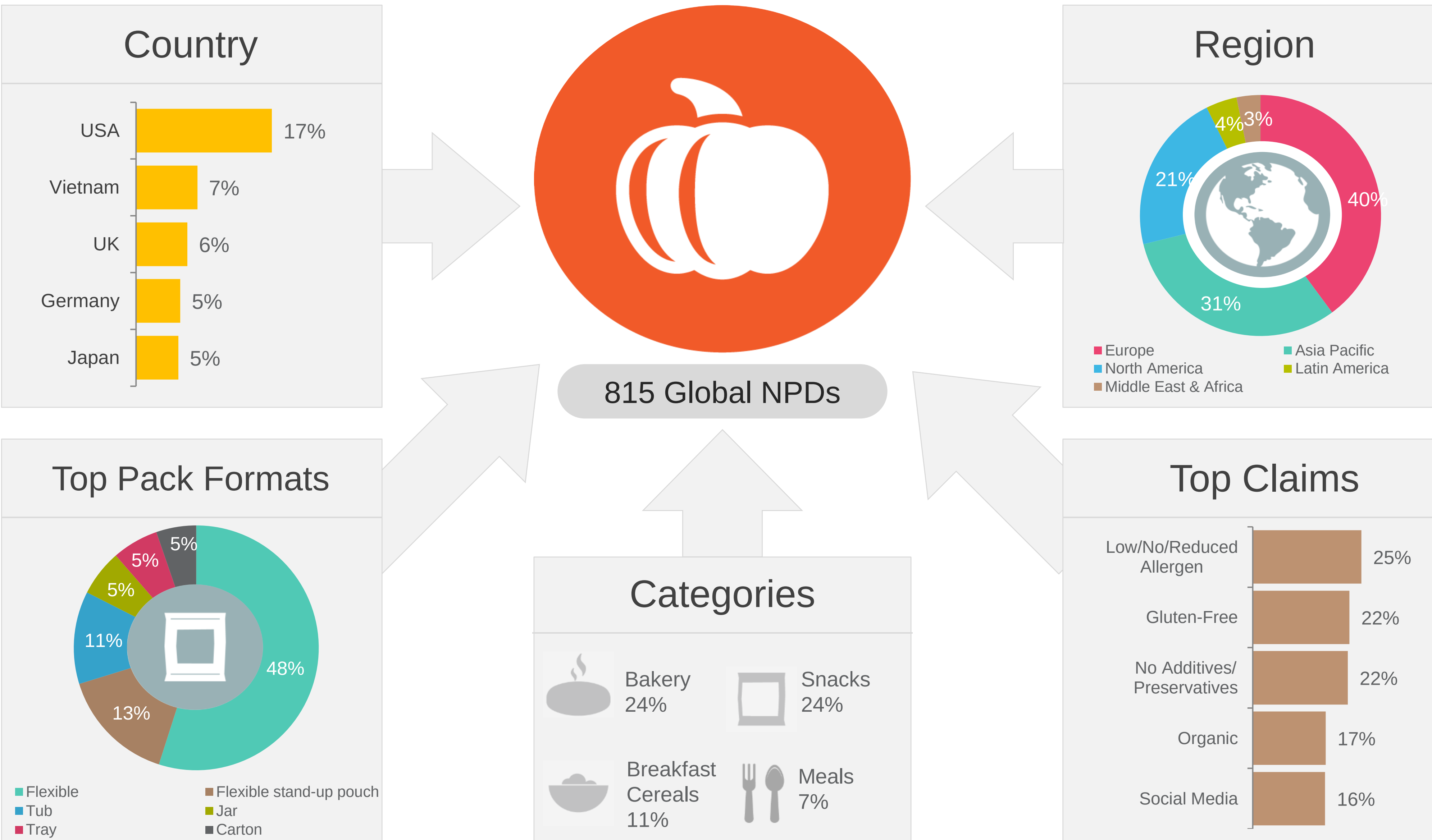
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Pumpkin Product Launch Trends.

Pumpkin Global NPDs

July – October 2016

There were 815 products launched in the past three months that contained pumpkin. Europe and Asia Pacific were the main regions for launches, while USA was the key country. Flexible packaging remained the most common format. Launches were predominately in bakery items and snack categories.



Pumpkin Product Launches:
Last 3 Months (July – October 2016)
Summary

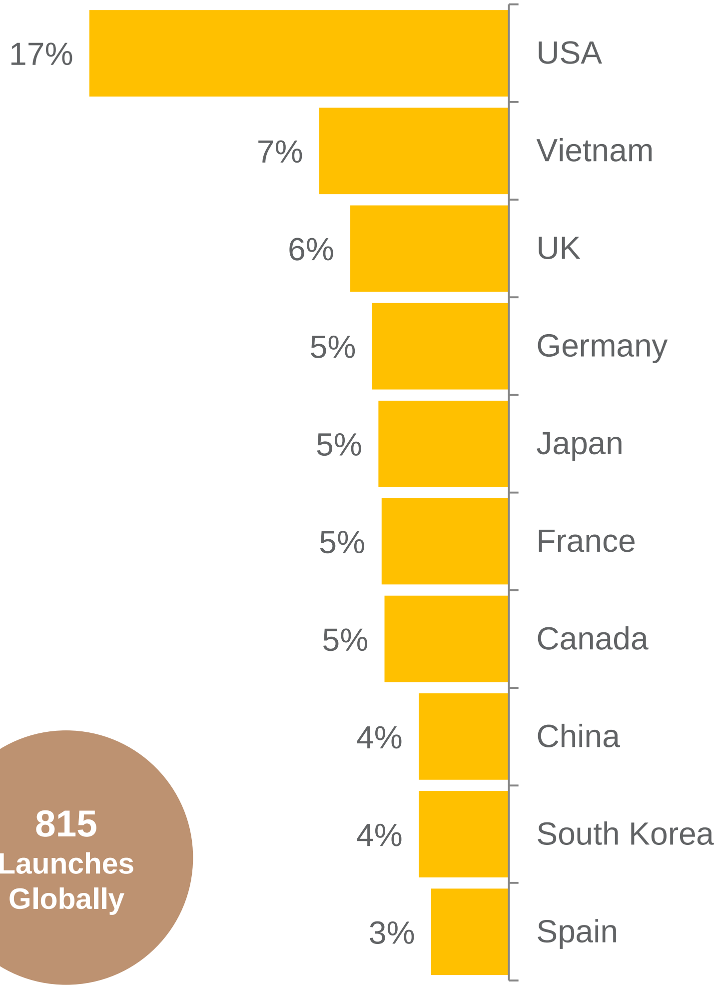
- A total of 815 products containing pumpkin as an ingredient were launched globally in the last 3 months, higher than the previous quarter (687 launches).
- There were 24 pumpkin launches in Australia this quarter.
- Europe (40%) and Asia Pacific (31%) were the top regions for launches. Key countries for innovation were USA (17%), Vietnam (7%), and UK (6%).
- Flexible packaging continues to be the widely used format for launches (48%).
- Top categories for product launches were bakery goods (24%), snacks (24%), and breakfast cereals (11%).
- Core claims for product launches globally were based around health e.g. low allergen (25%), gluten-free (22%), and no additives/preservatives (22%).
- The most innovative product was a pumpkin-chilli ketchup from the Czech Republic. See following pages for examples of product launches.

Source: Mintel (2016)

Pumpkin Launches
Country & Categories

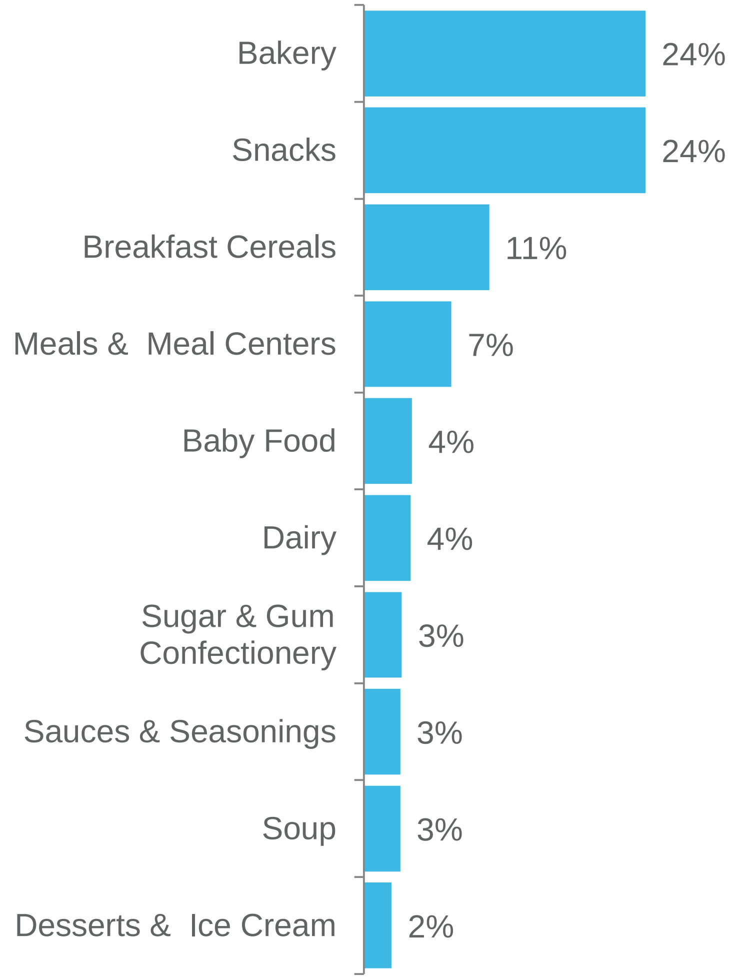
- The most active country for launches in the last 3 months was the USA, followed by Vietnam and the UK.
- Bakery items were the key category for launches, with snacks and breakfast cereals also common launches.

Top Launch Countries



815 Launches Globally

Top Launch Categories



Pumpkin Launches

Top Claims & Pack Formats Used

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

Pack Formats Used

Global	Flexible	48%
Global	Flexible stand-up pouch	13%
Global	Tub	11%
Europe	Flexible	44%
Europe	Tub	14%
Europe	Flexible stand-up pouch	11%
Asia Pacific	Flexible	55%
Asia Pacific	Flexible stand-up pouch	13%
Asia Pacific	Tub	8%

Top Claims Used

Global	Low/No/Reduced Allergen	25%
Global	Gluten-Free	22%
Global	No Additives/Preservatives	22%
Europe	Low/No/Reduced Allergen	29%
Europe	Gluten-Free	27%
Europe	Organic	23%
Asia Pacific	Seasonal	33%
Asia Pacific	No Additives/Preservatives	26%
Asia Pacific	Social Media	12%

Only regions with n >30 are displayed

Innovative Pumpkin Launches:
L3M (July – October 2016)

Woolworths Food Vegetarian Moroccan Patties (South Africa)

Woolworths Food Vegetarian Moroccan Patties comprise Moroccan spiced patties made with millet and couscous, served with roasted vegetables, kale and spiced tahini dressing. The vegan product can be microwaved in two minutes and 30 seconds, and retails in a 300g pack with a sleeve made from 70% previously recycled paper.

Claims:

Microwaveable, Vegetarian, Ethical - Environmentally Friendly Package, Vegan, No Animal Ingredients

H-E-B Select Ingredients Pumpkin Spice Bread Mix (USA)

H-E-B Select Ingredients Pumpkin Spice Bread Mix is now available. The product contains no artificial flavors or preservatives, high fructose corn syrup or hundreds of other synthetic ingredients, and contains unbleached enriched wheat flour, aluminium free baking powder, pumpkin powder and natural pumpkin spice flavor. The bread mix retails in a 16-oz. pack featuring recipe instructions and inviting the consumer to share their own recipe on #hebrecipe.

Claims:

No Additives/Preservatives, Vitamin/Mineral Fortified

Trader Joe's Organic Pumpkin Spice Granola Bark (USA)

Trader Joe's Organic Pumpkin Spice Granola Bark comprises pumpkin spice flavored granola layered with 66% cacao dark chocolate and topped with toasted pumpkin seeds. Described as a layered delight, this crunchy and chocolaty snack is made in small batches at the foot of the Green Mountains in Vermont. The gluten-free, kosher certified product retails in an 8-oz. pack.

Claims:

Kosher, Organic, Gluten-Free, Low/No/Reduced Allergen

Galerie Pumpkin Ale Bread Mix (USA)

Galerie Pumpkin Ale Bread Mix is now available. The product retails in a 10-oz pack, featuring cooking directions.

Claims:

N/A

Source: Mintel (2016)

Innovative Pumpkin Launches:

L3M (July – October 2016)

Georg Organic Pumpkin-Chilli Ketchup (Czech Republic)

Georg Dýnový Chilli-Kecup Bio (Organic Pumpkin-Chilli Ketchup) has been added to the range. The product is described as a spicy culinary sensation with Hokkaido pumpkin that goes well with potato fries, curry sausage, pasta and rice dishes, grilled dishes and in dips. This gluten-free, organic product is low in sugar, suitable for vegans, it has a reduced calories content, is low in fat and retails in a 450ml pack featuring the BIO and EU Green Leaf logos.

Claims:
Low/No/Reduced Calorie, Low/No/Reduced Fat, Low/No/Reduced Sugar, Organic, Gluten-Free, Low/No/Reduced Allergen, Vegan, No Animal Ingredients

Iglo Gemüse-Ideen Pumpkin & Sweet Potato in Chili-Lime Butter (Germany)

Iglo Gemüse-Ideen Kürbis & Süßkartoffeln in Chili-Limetten-Butter (Pumpkin & Sweet Potato in Chili-Lime Butter) are now available. This product is suitable for vegetarians, is free from added flavour enhancers, flavours and colourings and retails in a 400g pack, that features the PEFC and Forever Food Together logos and preparation instructions.

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

Betty Crocker Pumpkin Spice Cookie Mix (Mexico)

Betty Crocker Mezcla para Preparar Galletas Sabor Calabaza y Especias (Pumpkin Spice Cookie Mix) is naturally and artificially flavored. The limited edition convenient product retails in a 496g pack, featuring the Facebook logo.

Claims:
Ease of Use, Limited Edition, Social Media

FamilyMart Pumpkin Ball (Japan)

FamilyMart Pumpkin Ball is now available for Halloween 2016. This product retails in a 60g pack. Launched on October 11, 2016 with an RRP of 130 yen.

Claims:
Seasonal

Source: Mintel (2016)

Innovative Pumpkin Launches:
L3M (July – October 2016)

Danone Oikos Pumpkin & Sweet Potato Yogurt (Japan)

Danone Oikos Fat Free Pumpkin & Sweet Potato Yogurt is now available for Autumn 2016. This low calorie and high protein Greek yogurt retails in a 110g pack. Launched on September 6, 2016 open-priced.

Claims:

Low/No/Reduced Calorie, Low/No/Reduced Fat, Seasonal, High Protein

FamilyMart Pumpkin & Chocolate Melting Cookie (Japan)

FamilyMart Pumpkin & Chocolate Melting Cookie is now available for Halloween 2016. This product is said to have a melting texture and retails in a 38g single unit pack. Launched on October 11, 2016 with an RRP of 108 yen.

Claims:

Seasonal

Archer Farms Pumpkin Pancake & Waffle Mix (USA)

Archer Farms Pumpkin Pancake & Waffle Mix has been repackaged in a new design, and is now available for a limited time only. The mix features cinnamon, nutmeg and ginger, and it retails in a 16-oz. pack featuring a pumpkin bar recipe.

Claims:

Limited Edition

D&J Pumpkin Noodles (Hong Kong)

D&J Pumpkin Noodles are suitable for vegans. According to the manufacturer, pumpkin contains beta-carotene and this antioxidant can help people maintain the mind clear, and pumpkin seeds contain zinc which helps promote the functioning of the brain. This product retails in a 300g pack featuring the Facebook logo.

Claims:

Antioxidant, Brain & Nervous System (Functional), Vegan, No Animal Ingredients, Social Media

Source: Mintel (2016)

Top Australian Pumpkin Launches:
L3M (July – October 2016)

Chobani Pumpkin Pie Yogurt

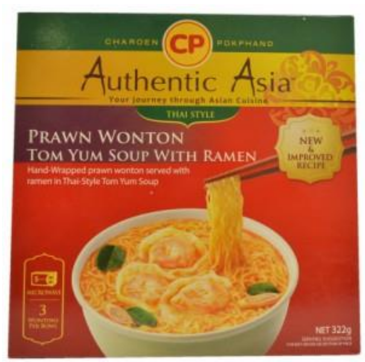
Chobani Pumpkin Pie Yogurt is now available. This authentic strained product contains less than 2% fat and is free from preservatives, artificial colours and flavours. The Halloween batch yogurt retails in a 170g pack. The manufacturer claims to give 10% of profits to charities worldwide.

Claims:

No Additives/Preservatives, Low/No/Reduced Fat, Seasonal, Ethical - Charity

CP Authentic Asia Thai Style Prawn Wonton Tom Yum Soup with Ramen

CP Authentic Asia Thai Style Prawn Wonton Tom Yum Soup with Ramen has been reformulated with a new and improved recipe. It contains three hand wrapped prawn wontons served with ramen in a Thai style tom yum soup. The microwavable product retails in a recyclable 322g pack featuring the Facebook logo.



Claims:

Microwaveable, Ethical - Environmentally Friendly Package, Social Media

The Real Risotto Roast Vegetable Risotto with Parmesan

The Real Risotto Roast Vegetable Risotto with Parmesan can be prepared in four minutes and thirty seconds. The microwavable, heat & eat product is free from artificial colours and flavours, and retails in a 500g pack.

Claims:

No Additives/Preservatives, Microwaveable, Ease of Use

Heinz Pumpkin, Capsicum & Carrots Puree

Heinz Pumpkin, Capsicum & Carrots Puree is suitable for babies aged four months and over. The steam cooked product is free from artificial colours, flavours, preservatives, added salt and added sugar, and is made with four types of vegetables. This easy-to-serve product retails in a 120g pack, bearing a Facebook logo.

Claims:

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

Source: Mintel (2016)

Baby Broccoli.

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

Both purchase and consumption have increased this wave.

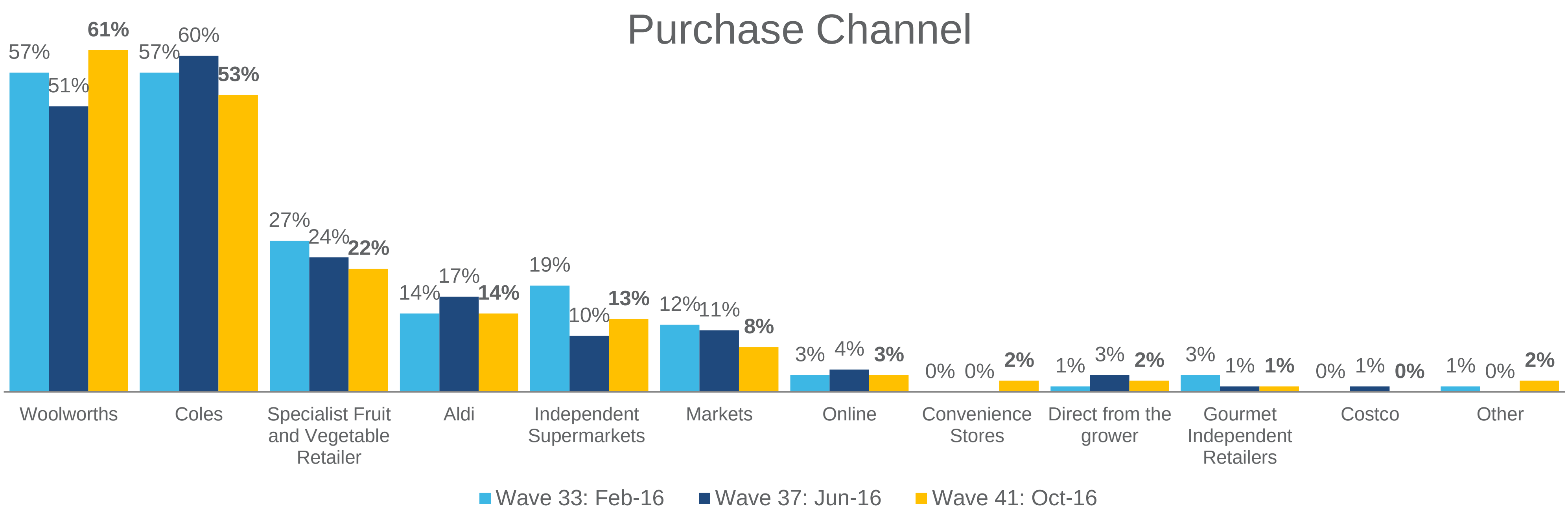
Baby broccoli is typically purchased from mainstream retailers, with a downwards trend in purchase from specialist vegetable retailers and markets over the last three waves.

Average Purchase **4.1** times per month

▼ 3.4 times, Wave 33
▼ 3.3 times, Wave 37

Average Consumption **7.1** times per month

▼ 6.1 times, Wave 33
▼ 6.3 times, Wave 37



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 33 N=201, Wave 37 N=205, Wave 41 N=201

Average Spend and Price Sensitivity

Average weight of purchase

The average consumer typically purchases **0.6kg** of baby broccoli, slightly lower than the previous waves.

▼ 0.5kg, Wave 33
▼ 0.5kg, Wave 37

Recalled last spend

The average recalled last spend is **$3.80** in October 2016, higher than the previous waves.

▼ $3.40, Wave 33
▼ $3.30, Wave 37

Value for money

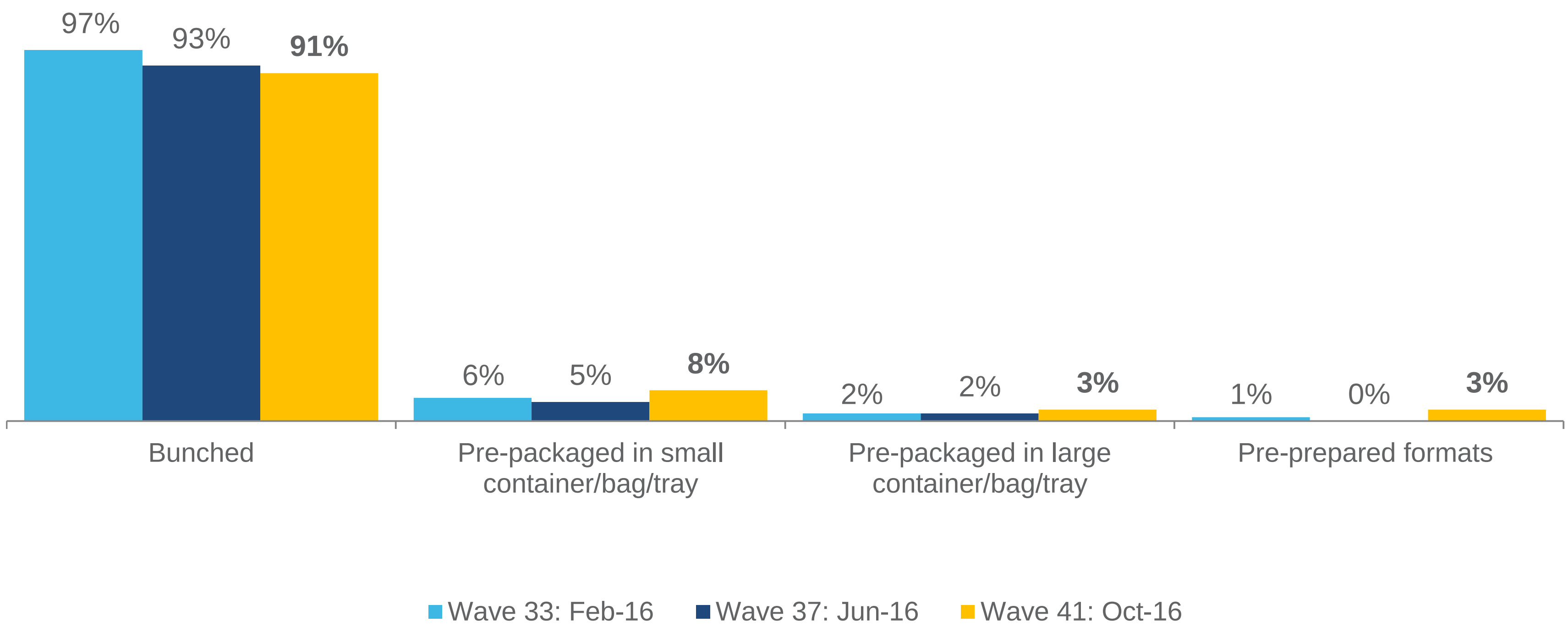
On average, consumers perceive baby broccoli to be relatively good value for money **(6.3/10).**

▼ 6.0/10, Wave 33
▼ 6.2/10, Wave 37

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 33 N=201, Wave 37 N=205, Wave 41 N=201

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

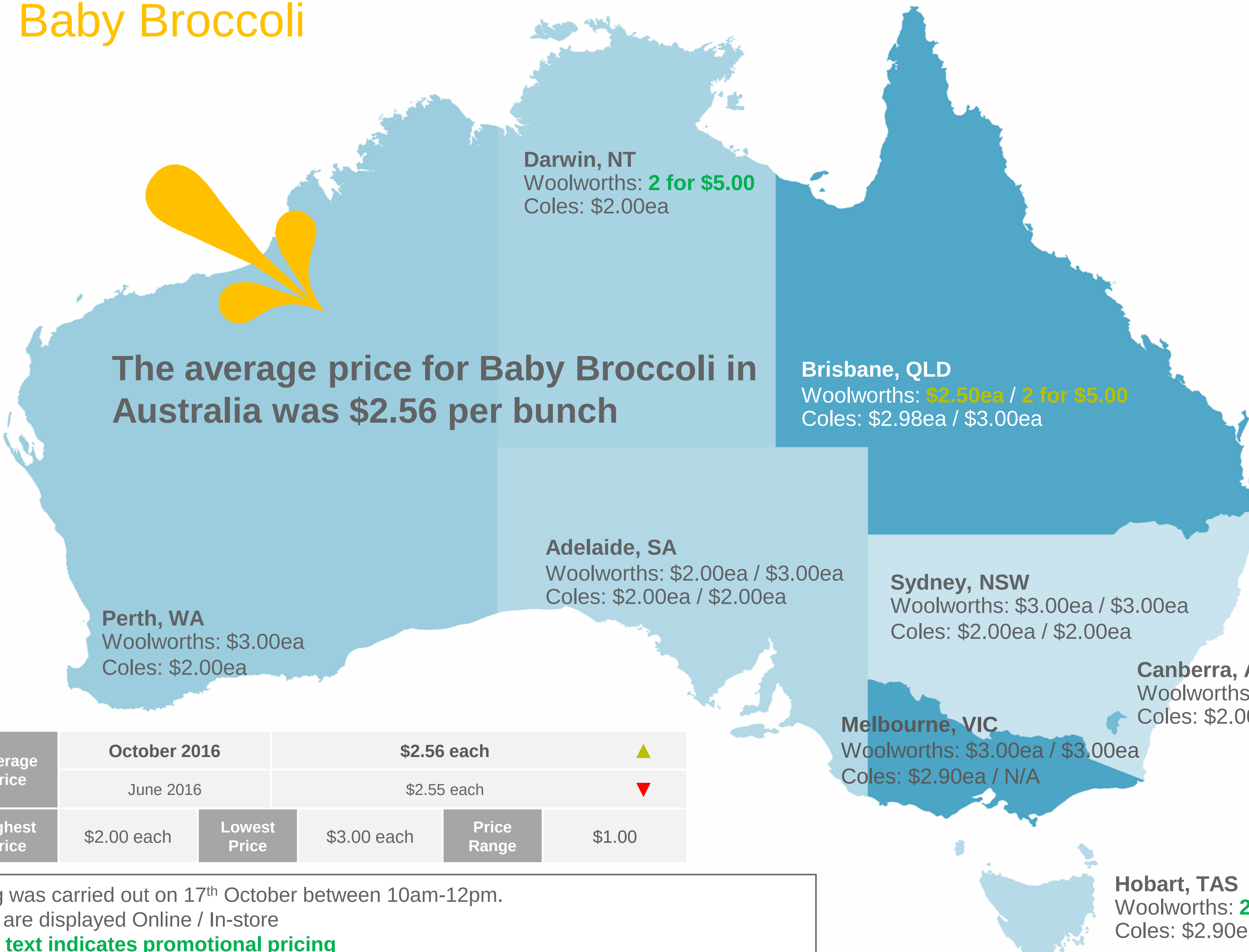
Bunched baby broccoli is the dominant format purchased by consumers, consistent with previous waves.



Q4b. In what fresh formats do you typically purchase <commodity>?
Sample Wave 33 N=201, Wave 37 N=205, Wave 41 N=201

Online and In-store Commodity Prices

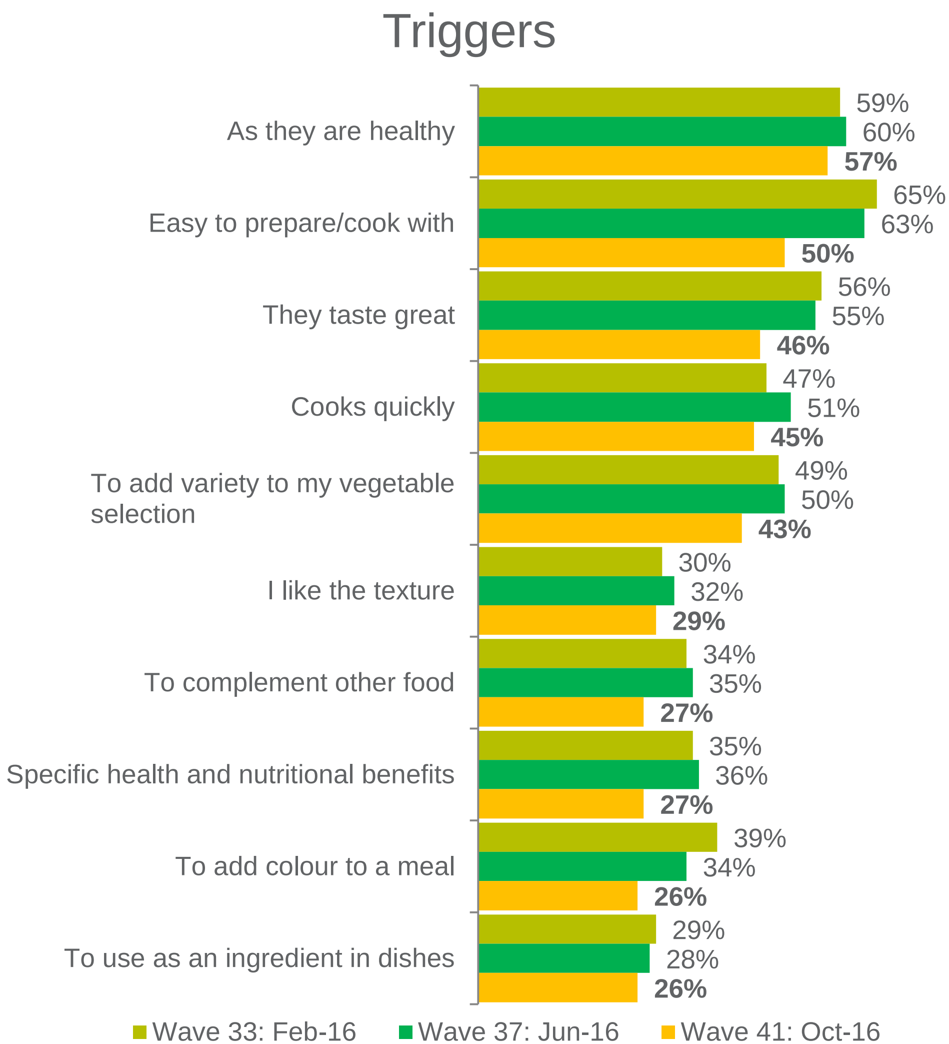
Baby Broccoli

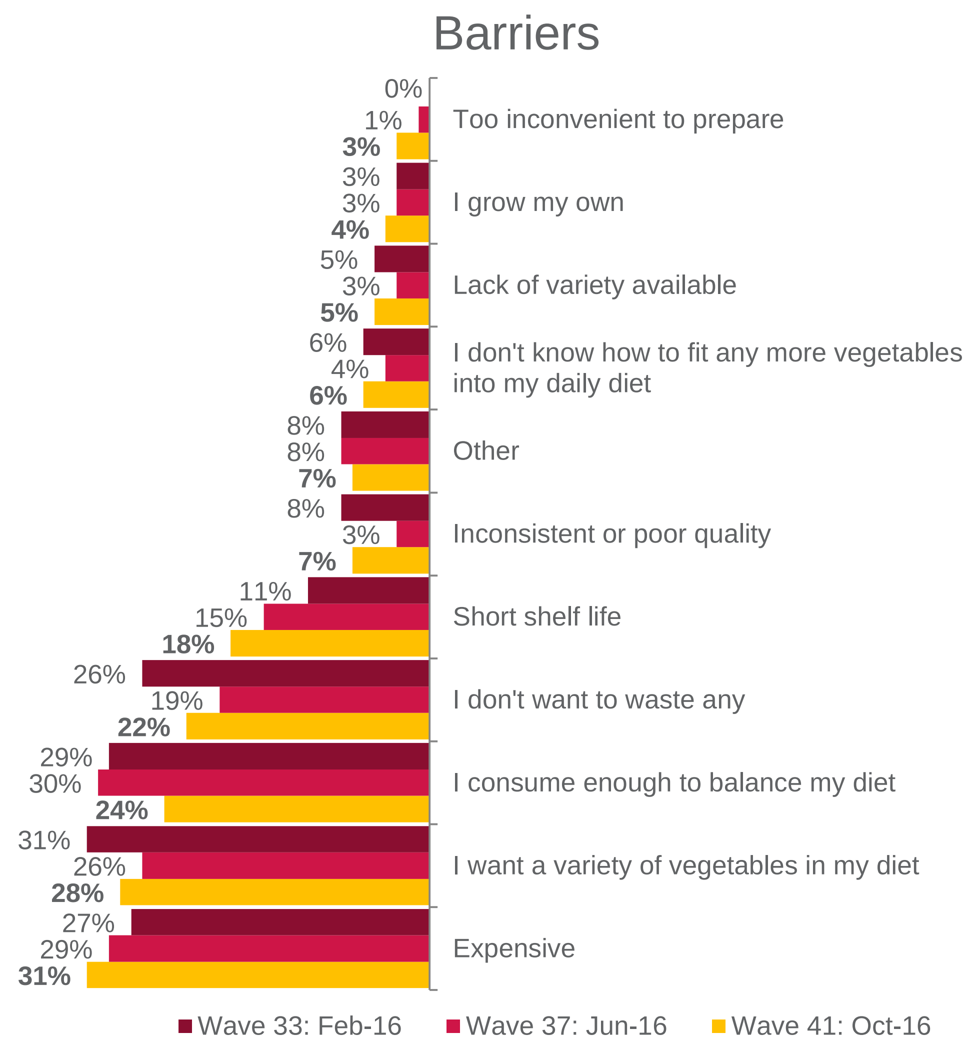


Average Price	**October 2016**		**$2.56 each**		▲
	June 2016		$2.55 each		▼
Highest Price	$2.00 each	**Lowest Price**	$3.00 each	**Price Range**	$1.00

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

Health and ease of preparation are the key drivers for baby broccoli purchase. Price and wanting a variety of vegetables are the key barriers. Short shelf life has continued to increase as a barrier to purchase.





Q7. Which of the following reasons best describes why you purchase <commodity> ?
Q8. Which reason best describes why you don’t buy <commodity> more often?
Sample Wave 33 N=201, Wave 37 N=205, Wave 41 N=201

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

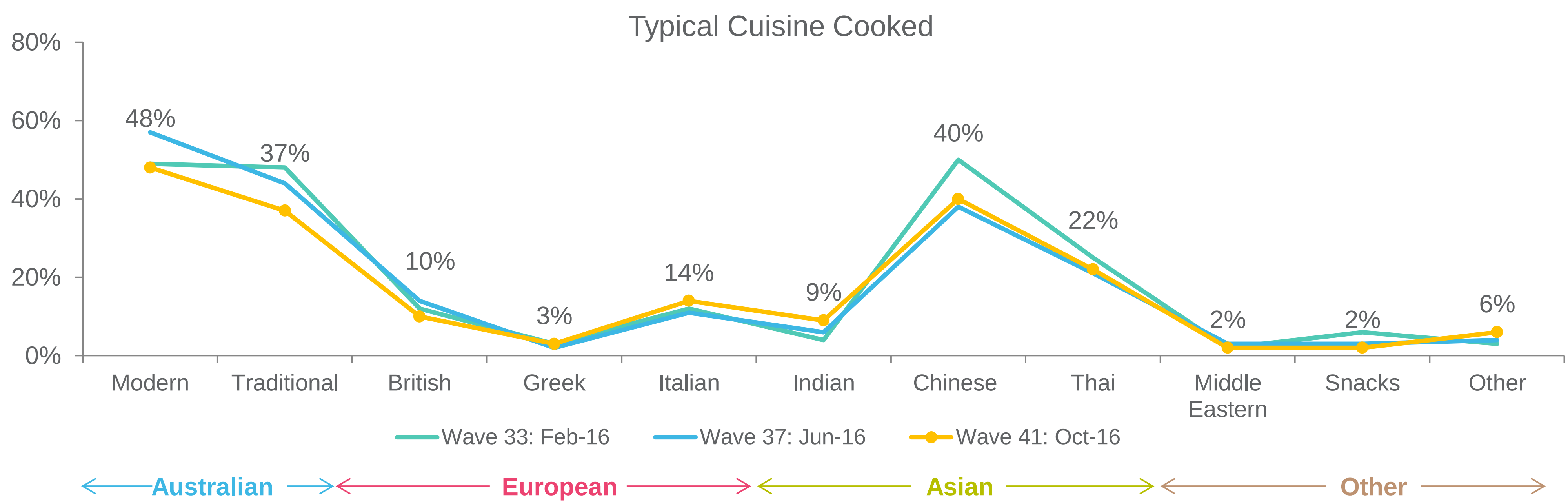
Key meal occasions are primarily centred around dinner and family meals.

Top 5 Consumption Occasions

	Wave 37	Wave 41
Dinner	68%	**69%**
Family meals	59%	**50%**
Quick Meals	35%	**38%**
Weekday meals	36%	**34%**
Weekend meals	31%	**25%**

11% used baby broccoli when cooking a new recipe

▼ 10%, Wave 37



Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?
Sample Wave 33 N=201, Wave 37 N=205, Wave 41 N=201

Horticulture Innovation Australia

colmar brunton.

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

Consumers continue to serve baby broccoli with carrots and potatoes. Steaming and stir frying remain the primary cooking styles.

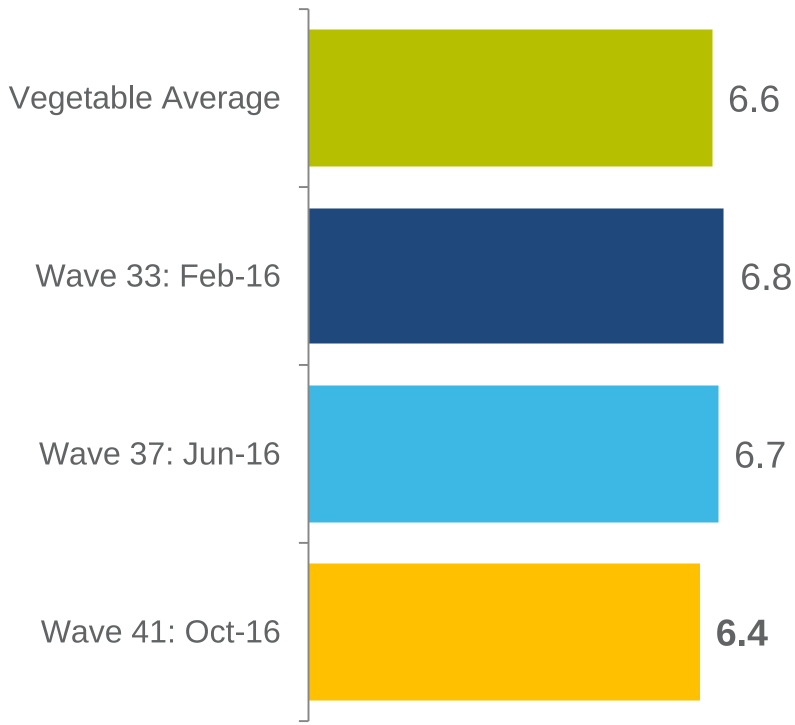
Accompanying Vegetables

Carrot	59%
Potatoes	52%
Sweet Potato	29%
Onion	26%
Cauliflower	25%

Top 10 Cooking Styles			
	Wave 33	Wave 37	Wave 41
Steaming	63%	60%	58%
Stir frying	54%	44%	46%
Boiling	27%	27%	24%
Microwave	29%	25%	23%
Sautéing	14%	6%	12%
Frying	6%	6%	9%
Soup	5%	6%	8%
Slow Cooking	5%	9%	7%
Raw	6%	4%	4%
Roasting	6%	6%	4%

Q9. How do you typically cook <commodity>?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
Sample Wave 33 N=201, Wave 37 N=205, Wave 41 N=201

General importance of provenance has eased this wave, which now sits below the Vegetable Average. However, consumers are more interested in knowing that baby broccoli is grown in Australia.



7.9 ▽

Wave 37: **8.1**

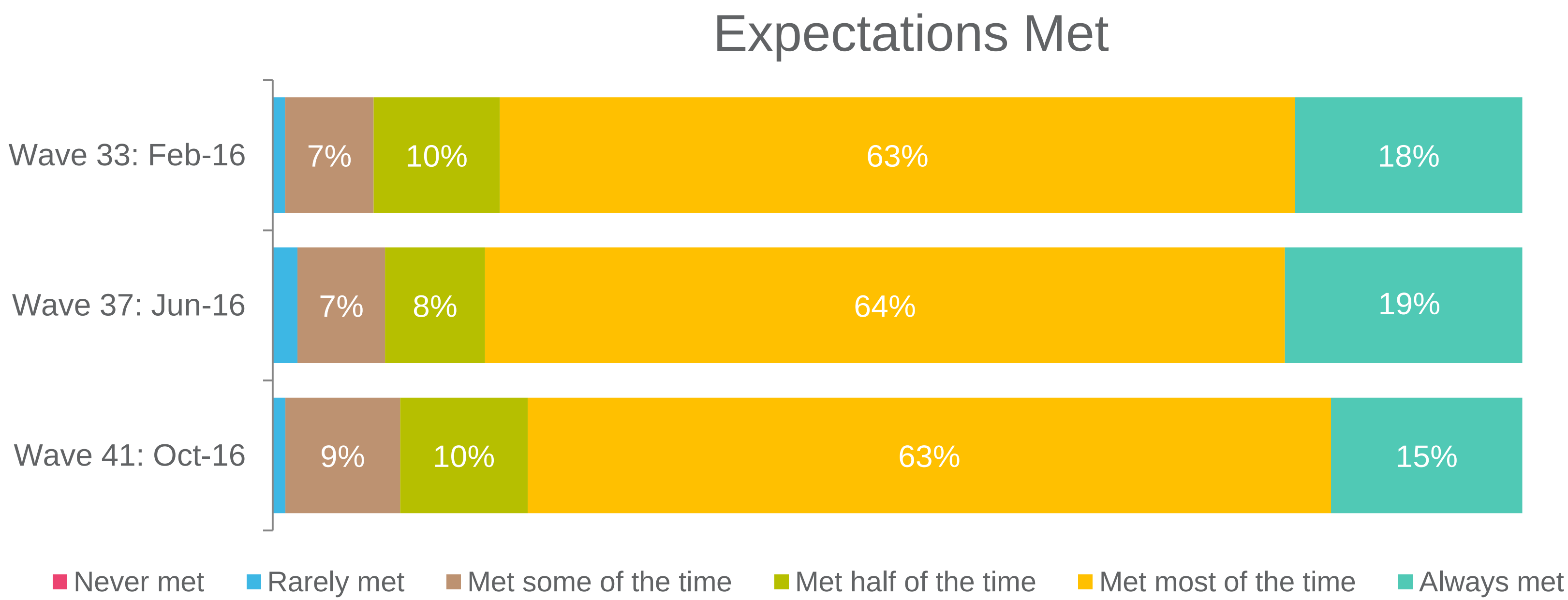
Q14. When purchasing Broccolini/Baby Broccoli, how important is Provenance to you?
(that is, knowing where the product is grown/where it comes from)
Q15. And when purchasing Broccolini/Baby Broccoli, how important is that it is grown in Australia?
Mean scores out of 10.
Sample Wave 33 N=201, Wave 37 N=205, Wave 41 N=201

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

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

Expected to stay fresh for **6.5** days

▼ 6.1 days, Wave 33
— 6.5 days, Wave 37



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 33 N=201, Wave 37 N=205, Wave 41 N=201

Horticulture Innovation Australia
colmar brunton.

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

Silverbeet.

Average purchase and consumption of silverbeet both increased this wave.

Coles has rebounded back after a sharp dip in Wave 37. Purchase from Woolworths and specialist vegetable retailers have trended downwards over the last three waves.

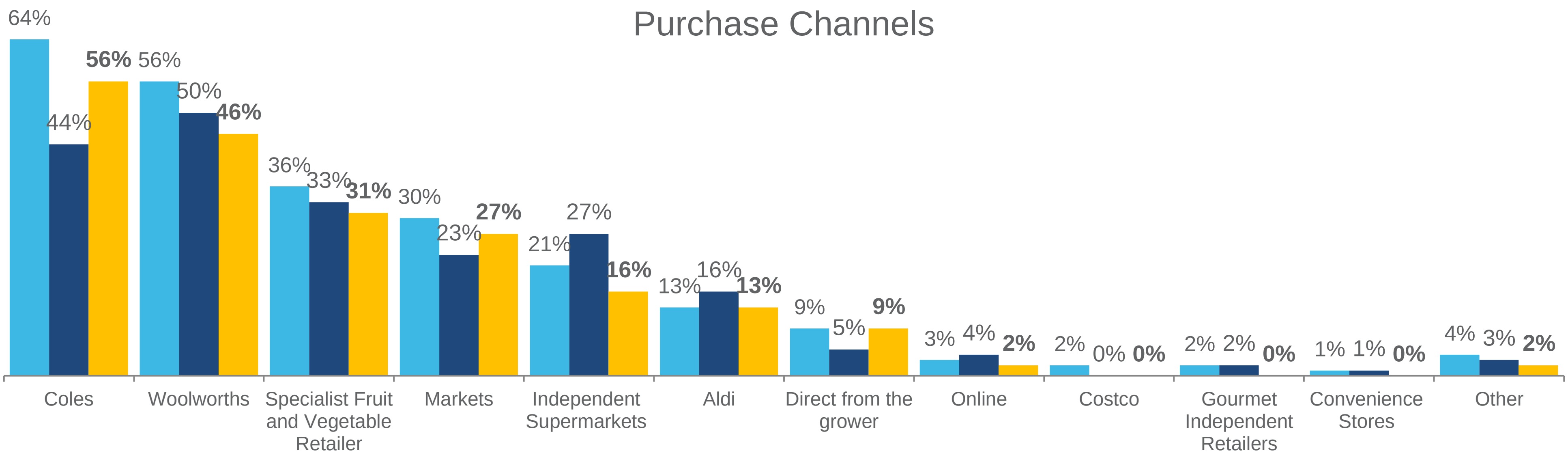
Average Purchase **3.4** times per month

▲ 3.7 times, Wave 33
▼ 3.3 times, Wave 37

Average Consumption **7.2** times per month

▼ 6.7 times, Wave 33
▼ 6.2 times, Wave 37

Purchase Channels



Q1. On average, how often do you purchase silverbeet?
Q2. On average, how often do you consume silverbeet?
Q5. From which of the following channels do you typically purchase silverbeet?
Sample Wave 33 N=200, Wave 37 N=201, Wave 41 N=206

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 **0.8kg** of silverbeet, remaining relatively consistent with previous waves.

— 0.8kg, Wave 33
▲ 0.9kg, Wave 37

Recalled last spend

Recalled last spend on silverbeet is **$4.00**, which has increased by $0.70 from the previous wave.

▼ $3.40, Wave 33
▼ $3.30, Wave 37

Value for money

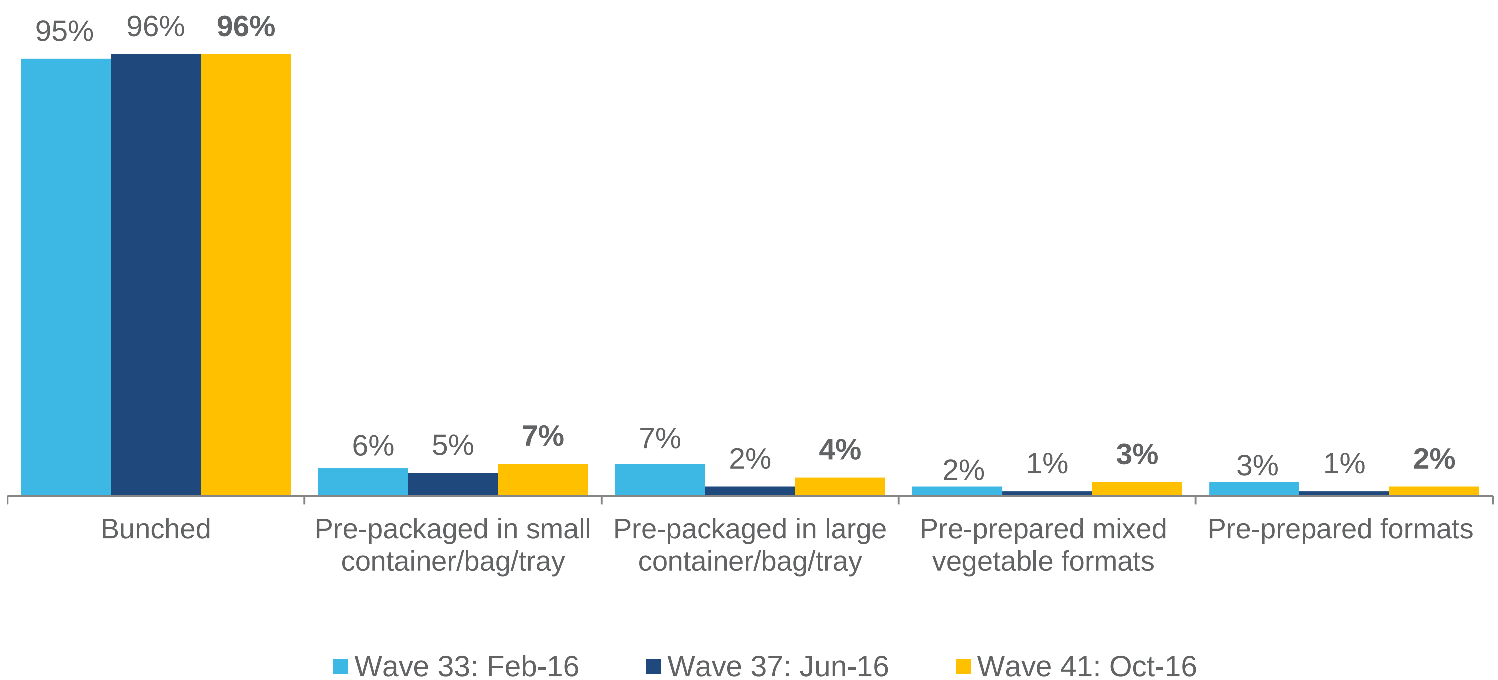
Consumers perceive silverbeet to be good value for money **(6.6/10)**, which has slightly eased this wave.

▼ 6.5/10, Wave 33
▲ 6.8/10, Wave 37

Q3. How much silverbeet do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 33 N=200, Wave 37 N=201, Wave 41 N=206

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

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

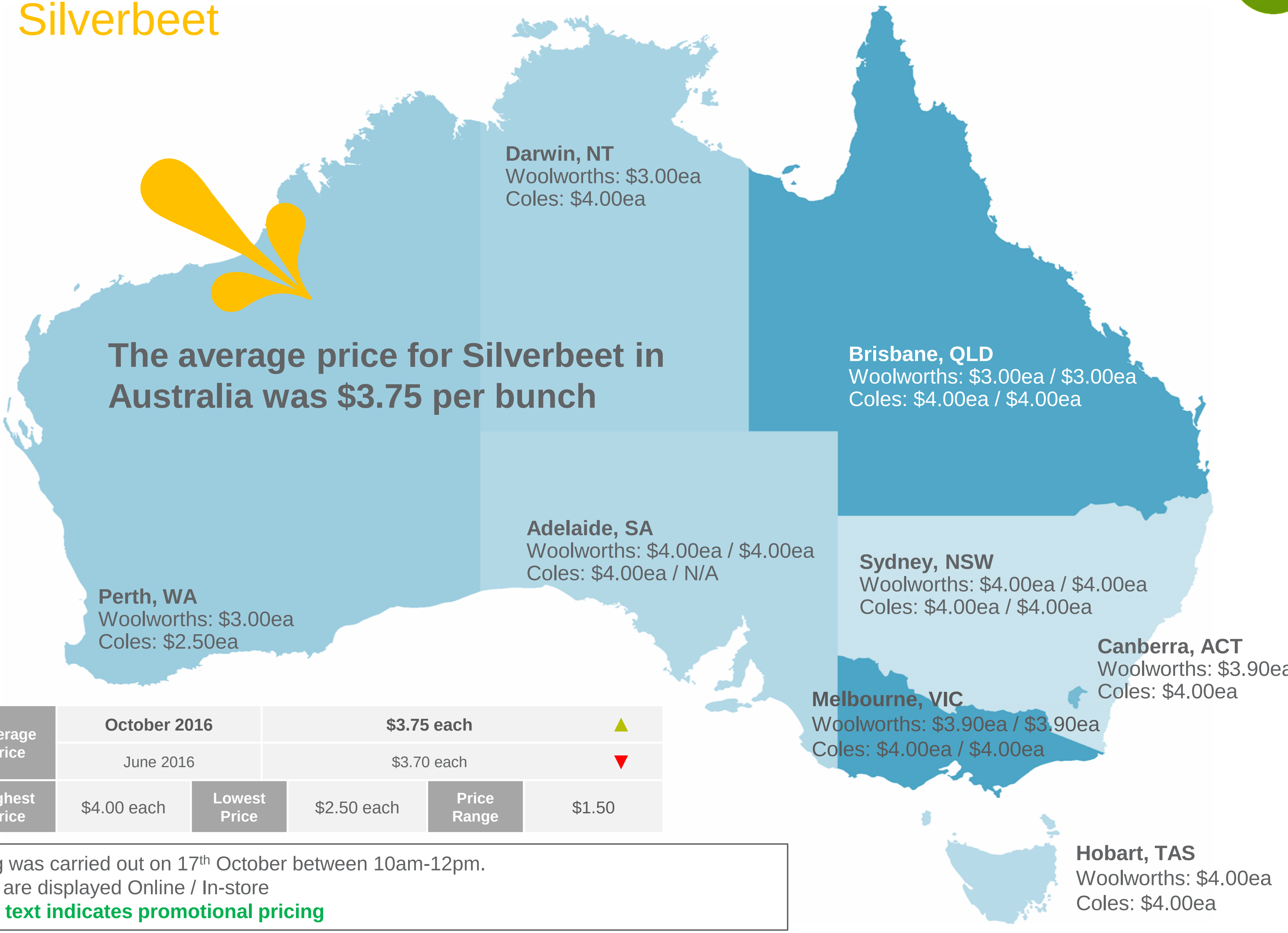


Q4b. In what fresh formats do you typically purchase Silverbeet?
Sample Wave 33 N=200, Wave 37 N=201, Wave 41 N=206

Online and In-store Commodity Prices

Silverbeet

The average price for Silverbeet in Australia was $3.75 per bunch

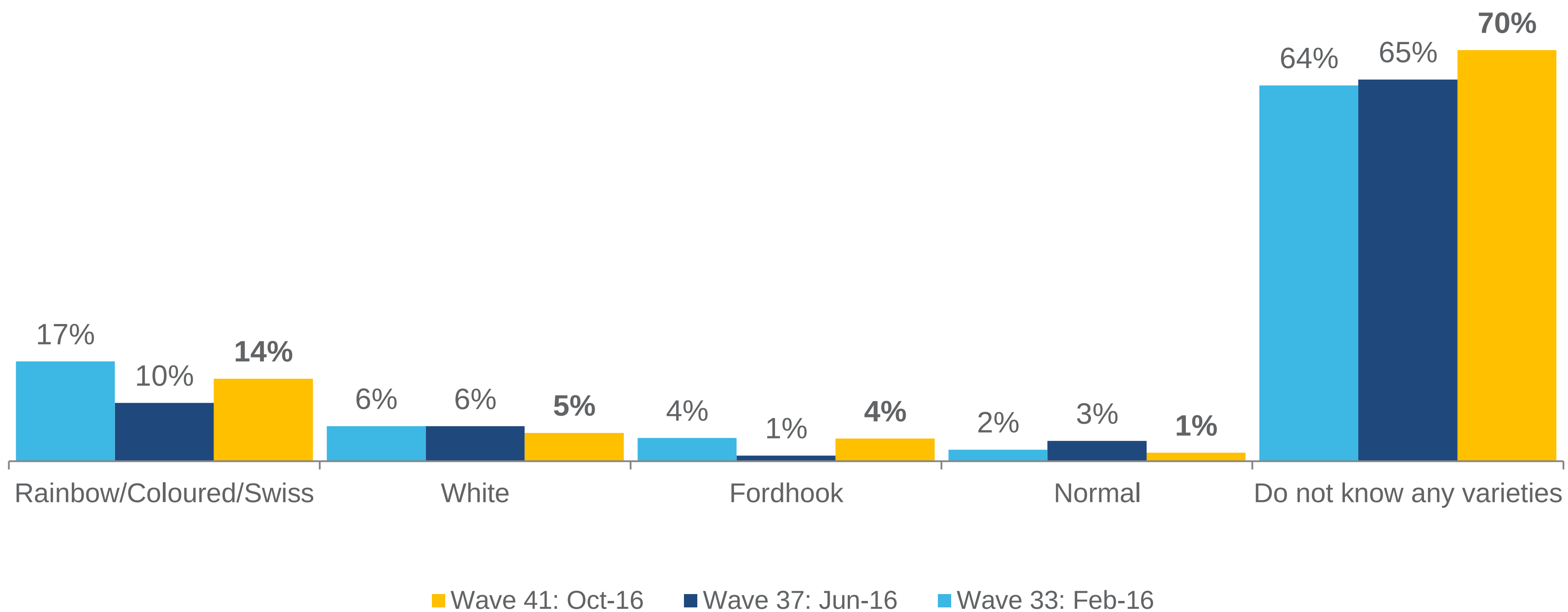


Average Price	**October 2016**	**$3.75 each** ▲			
	June 2016	$3.70 each ▼			
Highest Price	$4.00 each	**Lowest Price**	$2.50 each	**Price Range**	$1.50

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

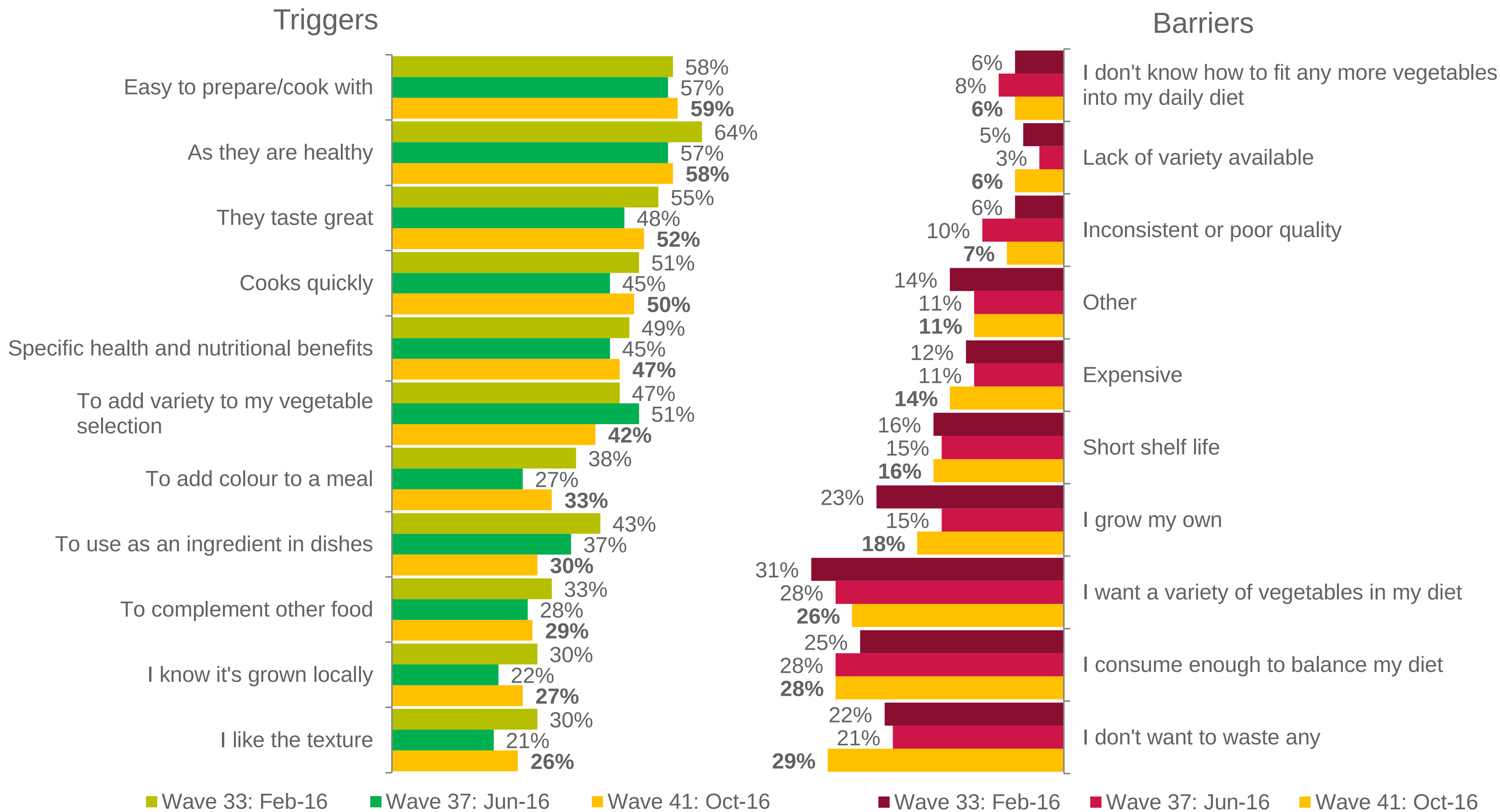
Spontaneous awareness for silverbeet is low, with the highest recall for rainbow/coloured/Swiss silverbeet.

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



Q6a. What varieties of Silverbeet are you aware of? (unprompted)
Sample Wave 33 N=200, Wave 37 N=201, Wave 41 N=206

The key drivers of purchase for silverbeet are ease of preparation and health. In contrast, not wanting to waste any and already consuming enough for their needs are the main barriers to purchase.



Q7. Which of the following reasons best describes why you purchase Silverbeet ?
Q8. Which reason best describes why you don't buy Silverbeet more often?
Sample Wave 33 N=200, Wave 37 N=201, Wave 41 N=206

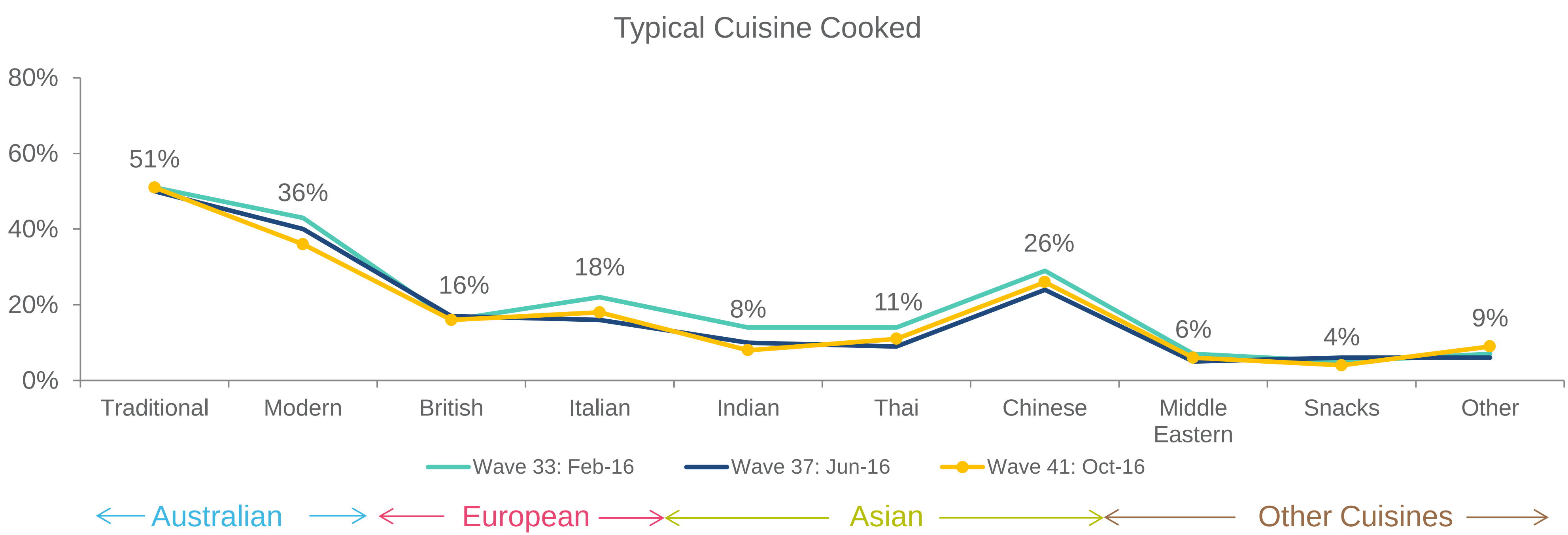
Silverbeet is popularly cooked in Australian and Chinese cuisine, consistent with past waves. Meal occasions tend to occur during dinner and family meals.

Top 5 Consumption Occasions

	Wave 37	Wave 41
Dinner	64%	**65%**
Family meals	62%	**60%**
Weekday meals	43%	**39%**
Weekend meals	30%	**33%**
Quick Meals	31%	**28%**

15% used silverbeet when cooking a new recipe

▼ 13%, Wave 37



Q10. What cuisines do you cook/consume that use Silverbeet?
Q11. Which of the following occasions do you typically consume/use Silverbeet?
Sample Wave 33 N=200, Wave 37 N=201, Wave 41 N=206

Horticulture Innovation Australia

colmar brunton.

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

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

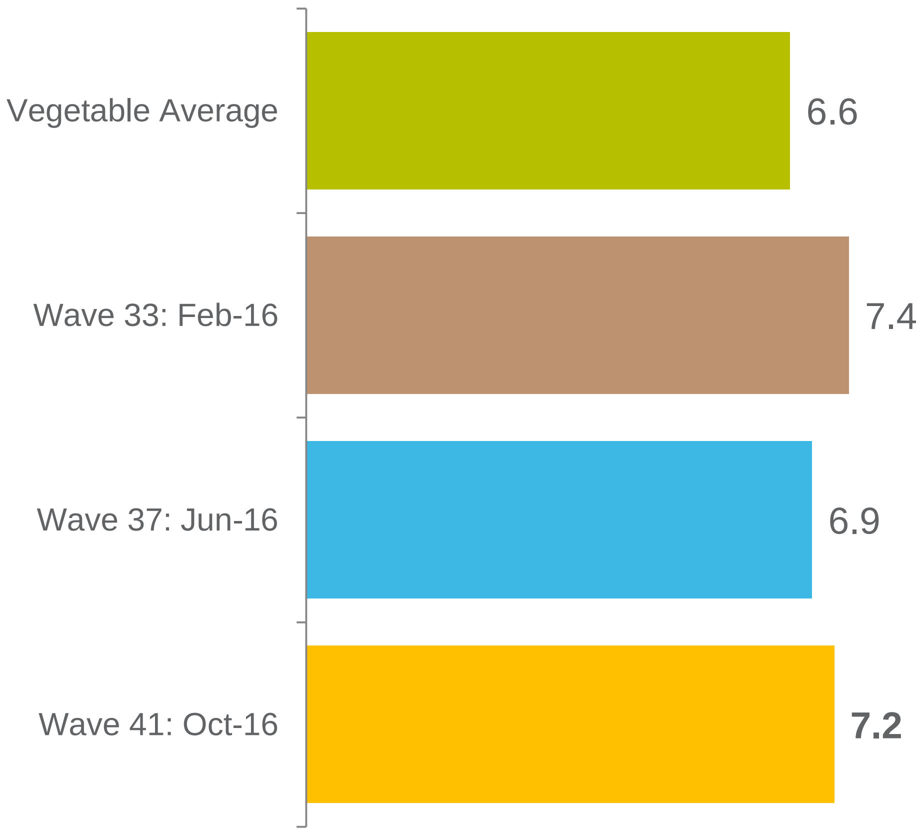
Accompanying Vegetables

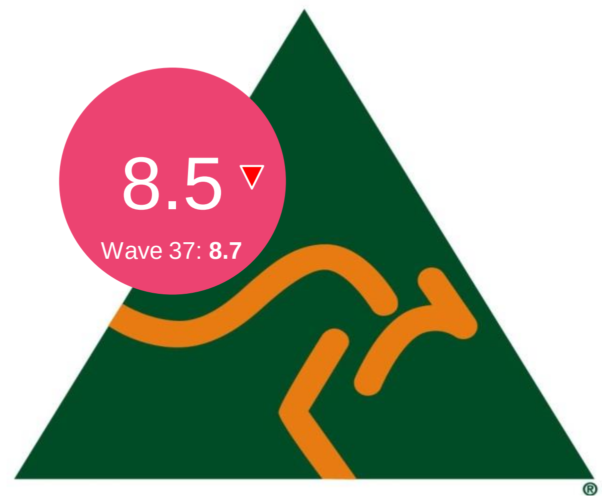
Potato	62%
Carrot	56%
Onion	31%
Pumpkin	30%
Cauliflower	25%

Top 10 Cooking Styles			
	Wave 33	Wave 37	Wave 41
Steaming	59%	56%	**57%**
Boiling	38%	39%	**37%**
Stir frying	43%	36%	**33%**
Sautéing	22%	18%	**21%**
Microwave	9%	14%	**18%**
Soup	24%	21%	**18%**
Slow Cooking	10%	12%	**11%**
Baking	13%	10%	**10%**
Raw	9%	6%	**7%**
Frying	11%	6%	**6%**

Q9. How do you typically cook Silverbeet?
Q10a. And when are you serving Silverbeet which of the following do you also serve together with this?
Sample Wave 33 N=200, Wave 37 N=201, Wave 41 N=206

This wave sees an increase in the importance of provenance for silverbeet. Knowing that silverbeet is grown in Australia remains highly important information to consumers.



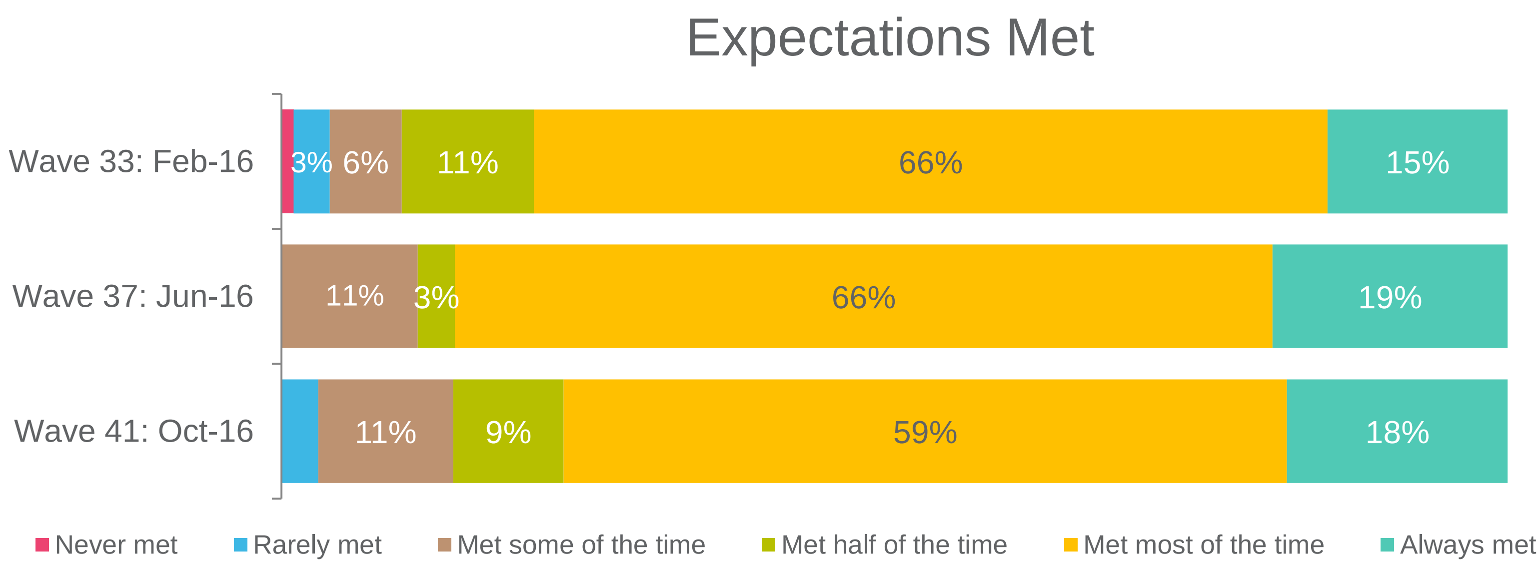


Q14. When purchasing Silverbeet, how important is Provenance to you?
Sample Wave 33 N=200, Wave 37 N=201, Wave 41 N=206

Freshness expectations for silverbeet have continued to improve since October 2015, and is now expected to stay fresh for just under a week. This length of freshness is generally being met most of the time.

Expected to stay fresh for **6.5** days

▼ 5.8 days, Wave 33
▼ 6.2 days, Wave 37



Q12. How long do you expect Silverbeet to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy Silverbeet?
Sample Wave 33 N=200, Wave 37 N=201, Wave 41 N=206

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

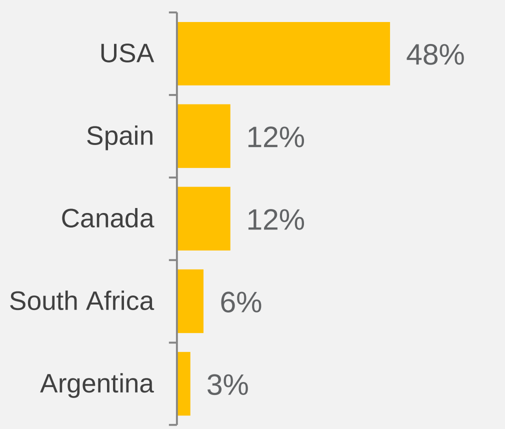
Silverbeet Product Launch Trends.

Silverbeet Global NPDs

July – October 2016

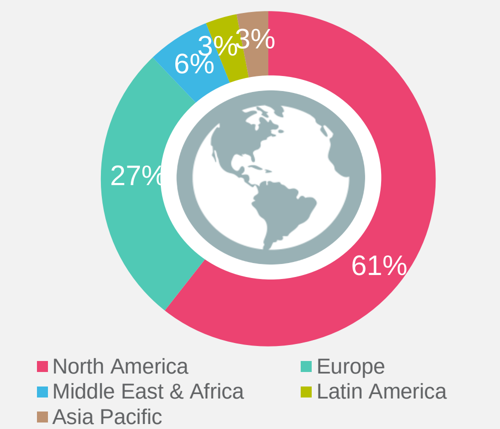
There were 33 products launched in the past three months that contained Silverbeet. North America was the top region for launches, with USA and Spain being the key countries. Flexible packaging remained the most common format. Launches were predominately in the fruit and vegetables category.

Country

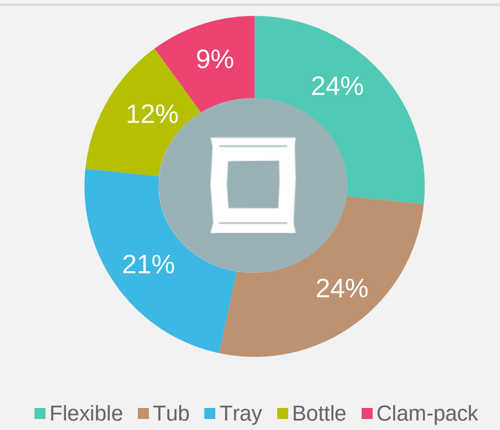


33 Global NPDs

Region



Top Pack Formats



Categories

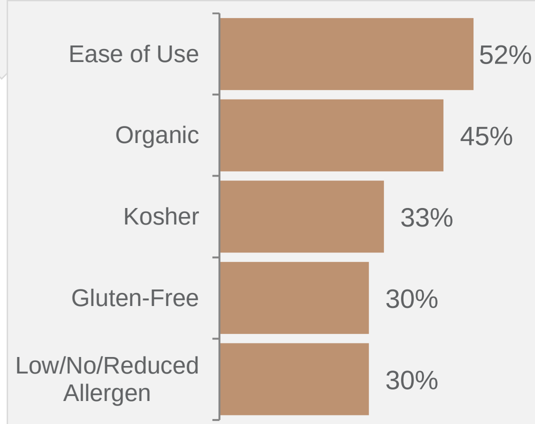
Fruit & Vegetables 42%

Meals 33%

Juice Drinks 12%

Processed Products 9%

Top Claims



Silverbeet Product Launches:
Last 3 Months (July – October 2016)
Summary

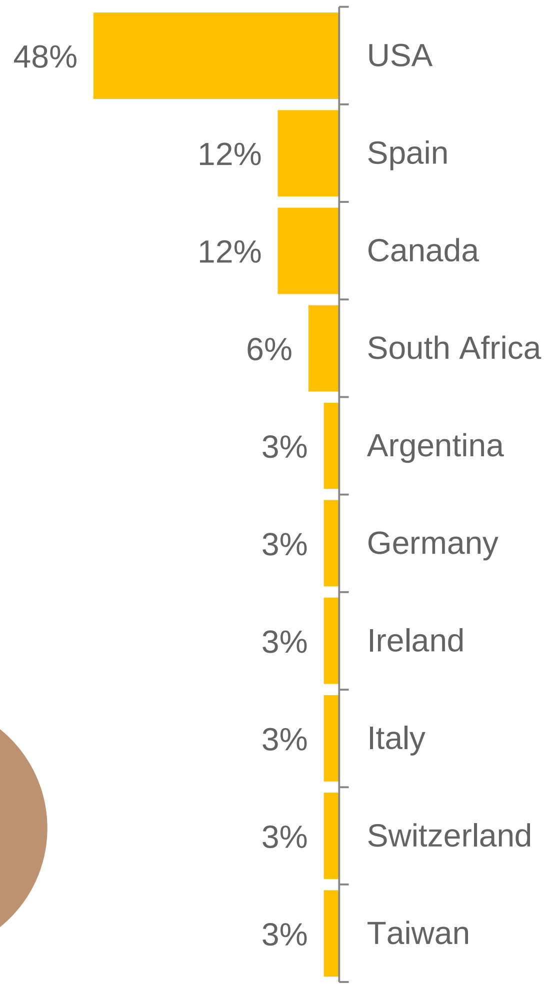
- A total of 33 products containing silverbeet as an ingredient were launched globally in the last 3 months.
- There were no silverbeet launches in Australia this quarter.
- North America (61%) was the top region for launches. Key countries for innovation were USA (48%), Spain (12%), and Canada (12%).
- Flexible and tub packaging was the most widely used format for launches (both 24%), followed by tray formats (21%).
- Top categories for product launches were fruit and vegetables (42%), meals and meal centres (33%) and juice drinks (12%).
- Core claims for product launches globally included ease of use (52%), organic (45%), and Kosher (33%).
- The most innovative product was a green cider smoothie from the USA. Other examples of products can be found at the end of the silverbeet trend report.

Source: Mintel (2016)

Silverbeet Launches
Country & Categories

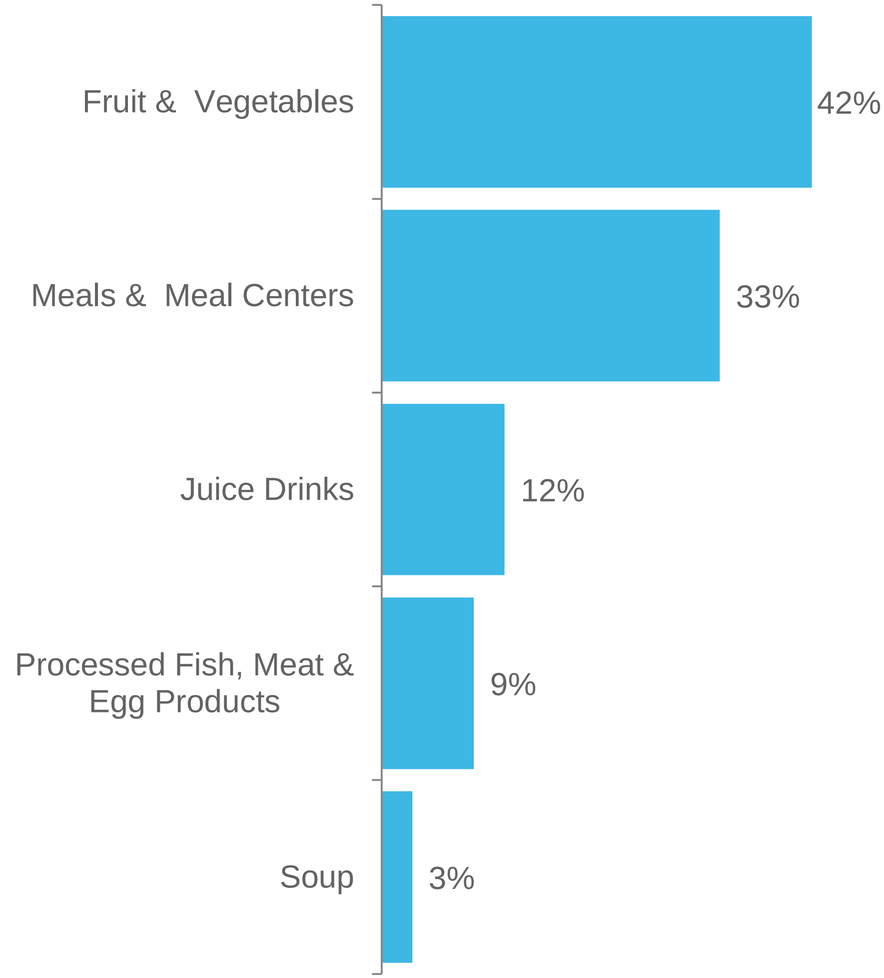
- The most active country for launches in the last 3 months was USA, Spain and Canada.
- Fruit and vegetables are the key category for launches, with meals and juice drinks also common launches.

Top Launch Countries



33
Launches Globally

Top Launch Categories



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Silverbeet Launches
Top Claims & Pack Formats Used

- The primary formats of choice were flexible packaging, tubs and trays, consistent with previous waves.
- Ease of use was the key claim used globally. Organic and Kosher were also prominent.

Pack Formats Used

	Format	%
Global	Flexible	24%
	Tub	24%
	Tray	21%
	Bottle	12%
	Clam-pack	9%

Top Claims Used

	Claim	%
Global	Ease of Use	52%
	Organic	45%
	Kosher	33%
	Gluten-Free	30%
	Low/No/Reduced Allergen	30%

Only regions with n >30 are displayed

Innovative Silverbeet Launches:

L3M (July – October 2016)

Organicgirl Green Cider Smoothie (USA)

Organicgirl Green Cider Smoothie comprises Greek yogurt, greens, chia, hemp seeds, almonds, apple and cinnamon, and has 50% juice content. The USDA organic-certified, cold-pressed smoothie contains 5g fiber, 8g protein and the equivalent of 1.2 servings of vegetables per bottle. The vegetarian product is perishable and free from gluten and GMOs, and retails in a 10-fl. oz. pack.

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

Woolworths Food Easy to Cook Sweet Cumin Lamb Stir Fry (South Africa)

Woolworths Food Easy to Cook Sweet Cumin Lamb Stir Fry comprises specially selected tender lamb cubes, a mix of fresh, crisp and crunchy vegetables and a sweet cumin sauce. It is said to be ideal to serve on egg noodles, rice, couscous and quinoa. The product can be prepared on the hob in ten minutes, and retails in a 700g partly recyclable pack including a separate sauce sachet.

Claims:
Ethical - Environmentally Friendly Package, Ease of Use

Acquafarina Vegan Cascione with Chard and Spinach (Italy)

Acquafarina Il Cascione Vegano Farcito Bietole e Spinaci (Vegan Cascione with Chard and Spinach) is described as a complete meal that is ready in only two minutes. The fresh product retails in a 180g pack.

Claims:
Vegan, Time/Speed, No Animal Ingredients

Kroger Fresh Selections Baby Spring Mix (USA)

Kroger Fresh Selections Baby Spring Mix is washed and ready to eat. It retails in a 10-oz. pack.

Claims:
Ease of Use

Source: Mintel (2016)

Innovative Silverbeet Launches:
L3M (July – October 2016)

Cumaná Chard (Argentina)

Cumaná Acelga (Chard) is new to the range. This product retails in an 800g pack featuring the Facebook logo.

Claims:
Social Media

True Organic Organic Citrus Carrot 100% Juice Smoothie (Canada)

True Organic Organic Citrus Carrot 100% Juice Smoothie is now available. This kosher certified product comprises a blend of juices from concentrate, with added ingredients including 5 1/2 oranges, 10 3/4 carrots, 2 3/4 apples, 1 1/3 grapefruits, and a vegetable blend. It is free of gluten and added sugar and retails in an 828ml pack.

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

Coop Betty Bossi Karma Oriental Couscous Salad with Olive Oil Dressing (Switzerland)

Coop Betty Bossi Karma Hartweizengriesssalat mit Jogurt, Gemüse und Salatsauce (Oriental Couscous Salad with Olive Oil Dressing) is now available. This vegetarian product contains a vegan salad with yogurt, vegetables and a sauce, and retails in a 200g pack bearing the V-Label seal from the European Vegetarian Union.

Claims:
Vegetarian, Vegan, No Animal Ingredients

Findus Speed Pocket Deep-frozen Pizza-sandwich stuffed with Ham, Cheese and Tomato (Spain)

Findus Speed Pocket Pizza-sándwich Ultracongelada Rellena de Jamón, Queso y Tomate (Deep-frozen Pizza-sandwich stuffed with Ham, Cheese and Tomato) has been repackaged with a new design. This microwaveable product contains no colours or preservatives, and retails in a 250g pack containing 2 x 125g units featuring the Facebook and Twitter logos.

Claims:
No Additives/Preservatives, Microwaveable, Social Media

Source: Mintel (2016)

Parsley.

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

Parsley is generally purchased from mainstream retailers, as well as from specialist vegetable retailers.

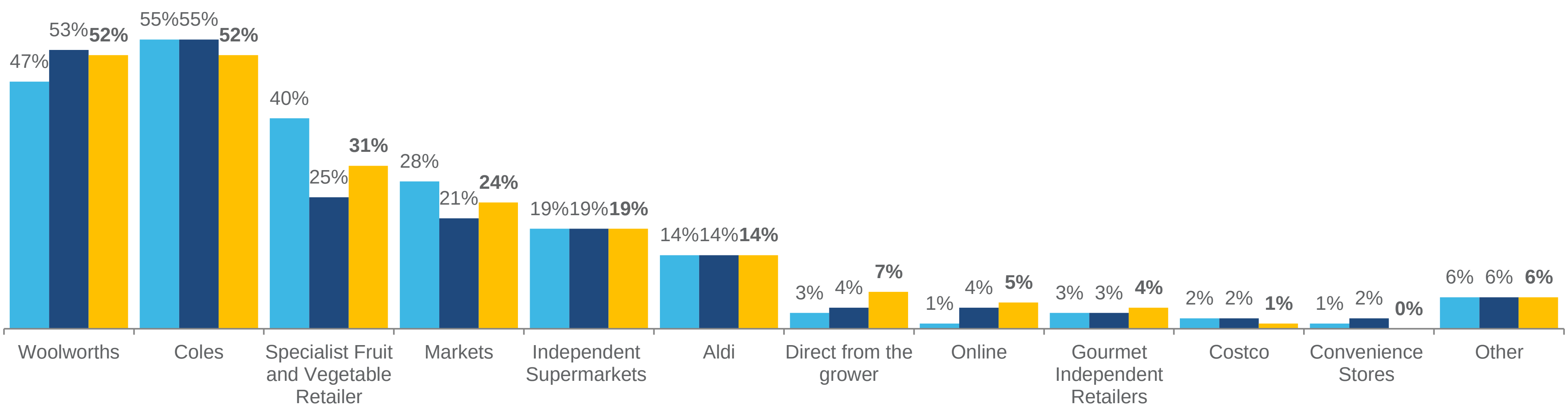
Average Purchase **4.3** times per month

▼ 3.9 times, Wave 33
▼ 3.6 times, Wave 37

Average Consumption **10.9** times per month

▼ 10.8 times, Wave 33
▲ 11.4 times, Wave 37

Purchase Channels



Q1. On average, how often do you purchase parsley?
Q2. On average, how often do you consume parsley?
Q5. From which of the following channels do you typically purchase parsley?
Sample Wave 33 N=201, Wave 37 N=200, Wave 41 N=207

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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 **0.3kg** of parsley, which is consistent with the previous wave.

▼ 0.2kg, Wave 33
— 0.3kg, Wave 37

Recalled last spend

Recalled last spend on parsley was **$3.00,** which has slightly increased this wave.

▼ $2.70, Wave 33
▼ $2.90, Wave 37

Value for money

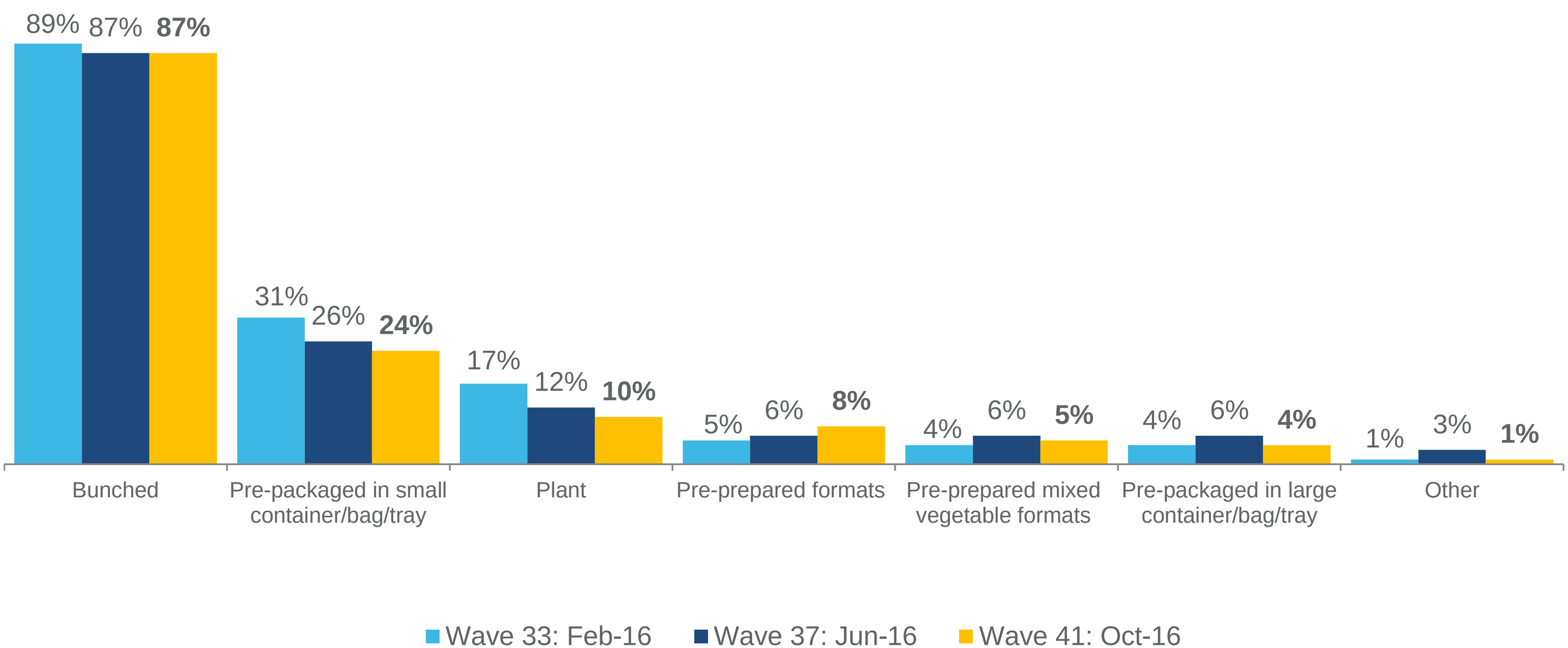
Consumers perceive parsley to be fair value for money **(5.9/10)**, which has returned to levels seen in Wave 33.

— 5.9/10, Wave 33
▲ 6.2/10, Wave 37

Q3. How much parsley do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 33 N=201, Wave 37 N=200, Wave 41 N=207

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

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

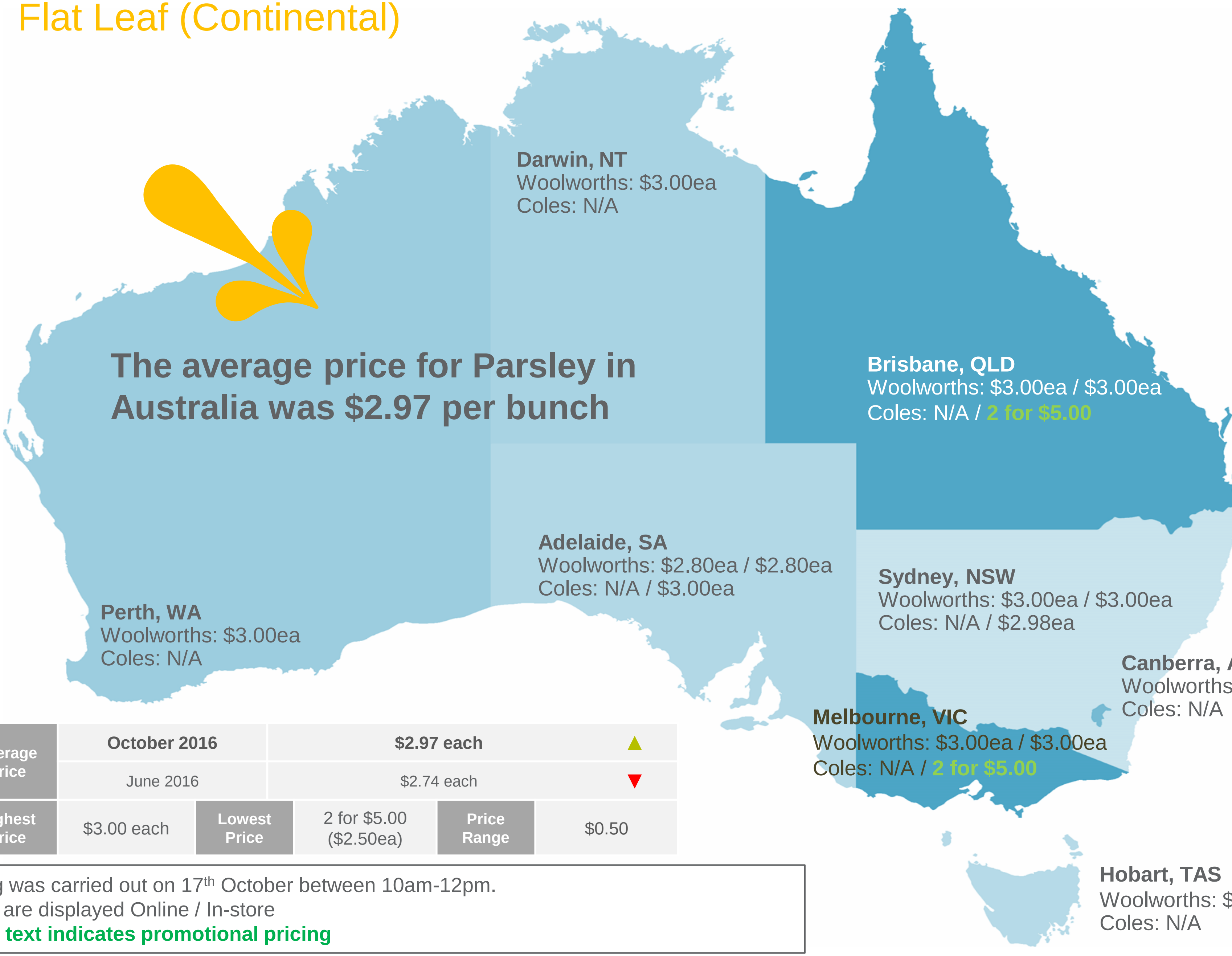


Q4b. In what fresh formats do you typically purchase Parsley?
Sample Wave 33 N=201, Wave 37 N=200, Wave 41 N=207

Online and In-store Commodity Prices

Flat Leaf (Continental)

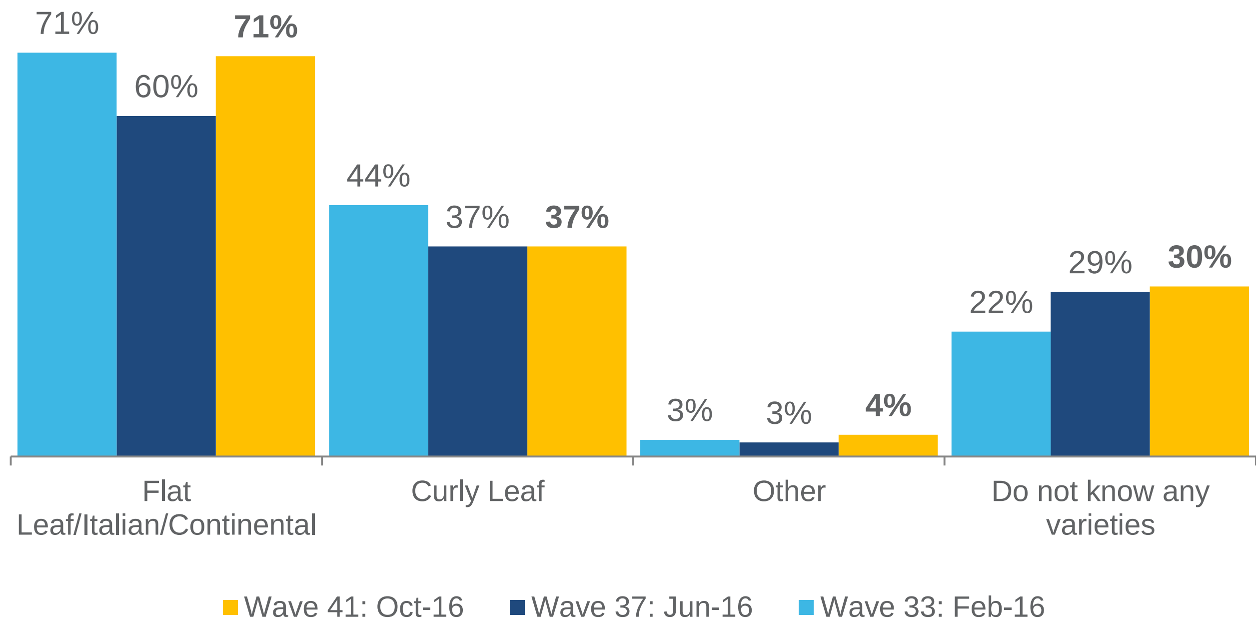
The average price for Parsley in Australia was $2.97 per bunch



Average Price	**October 2016**	**$2.97 each** ▲			
	June 2016	$2.74 each ▼			
Highest Price	$3.00 each	**Lowest Price**	2 for $5.00 ($2.50ea)	**Price Range**	$0.50

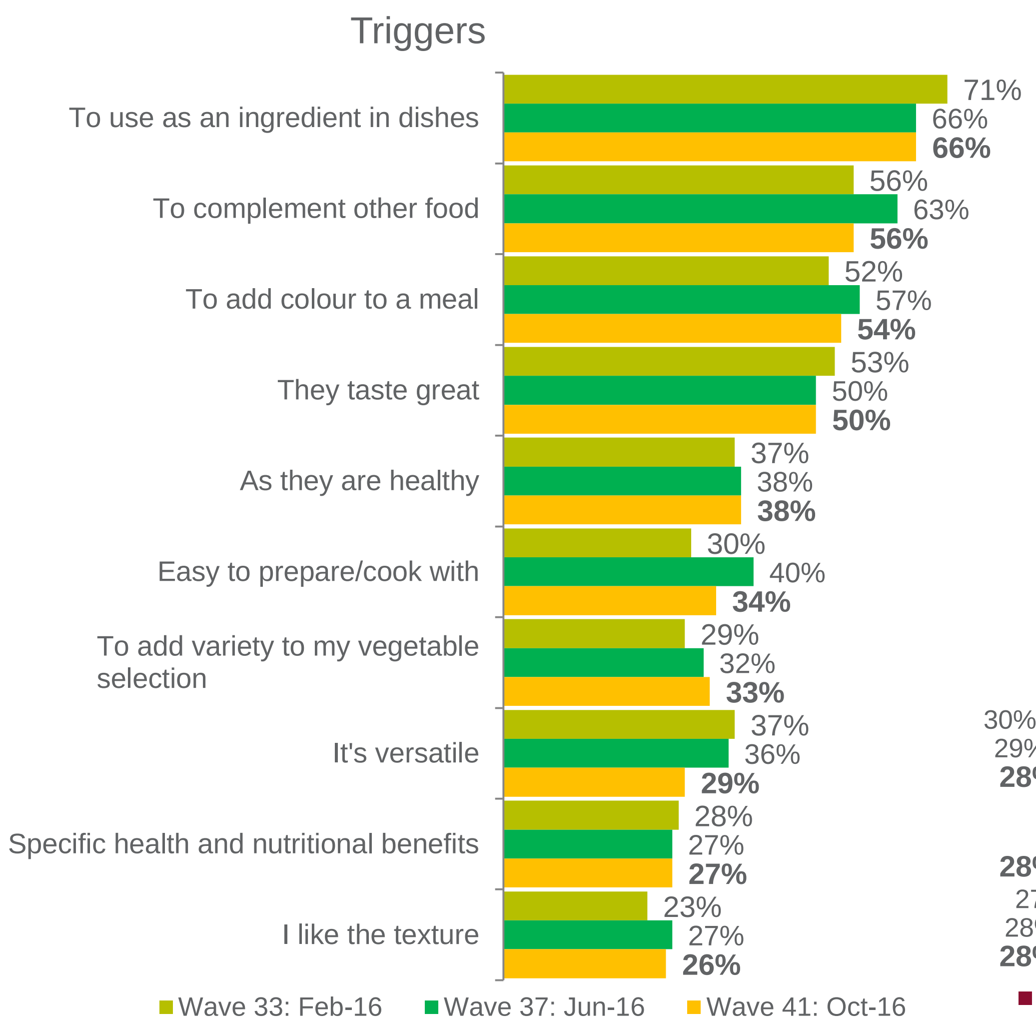
Pricing was carried out on 17th October between 10am-12pm.
Prices are displayed Online / In-store
Green text indicates promotional pricing

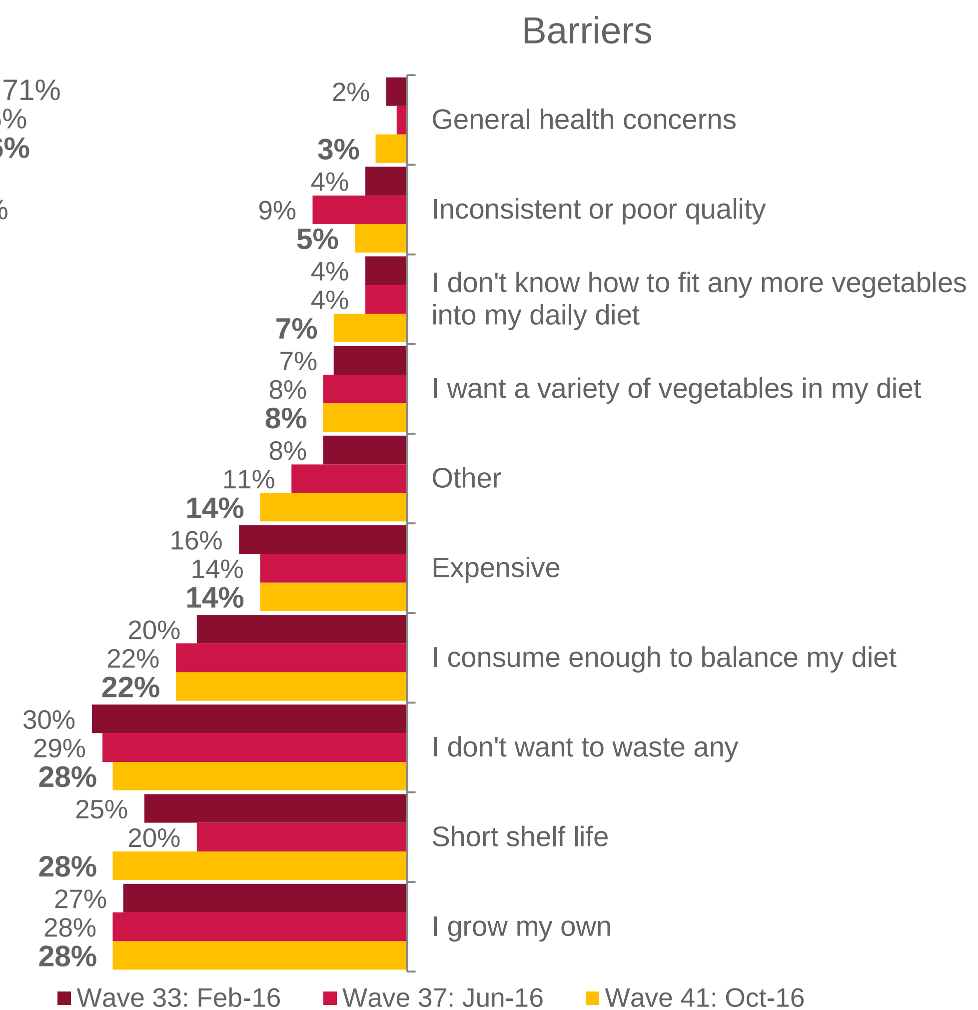
Awareness of parsley varieties has remained relatively consistent this wave. Most consumers recall Flat Leaf/Italian/Continental parsley and Curly Leaf parsley.



Q6a. What varieties of parsley are you aware of? (unprompted)
Sample Wave 33 N=201, Wave 37 N=200, Wave 41 N=207

Using parsley as an ingredient in dishes, complementing other foods and adding colour remain the key drivers of purchase. In contrast, the key barriers to purchase are growing their own and short shelf life.





Q7. Which of the following reasons best describes why you purchase parsley?
Q8. Which reason best describes why you don't buy parsley more often?
Sample Wave 33 N=201, Wave 37 N=200, Wave 41 N=207

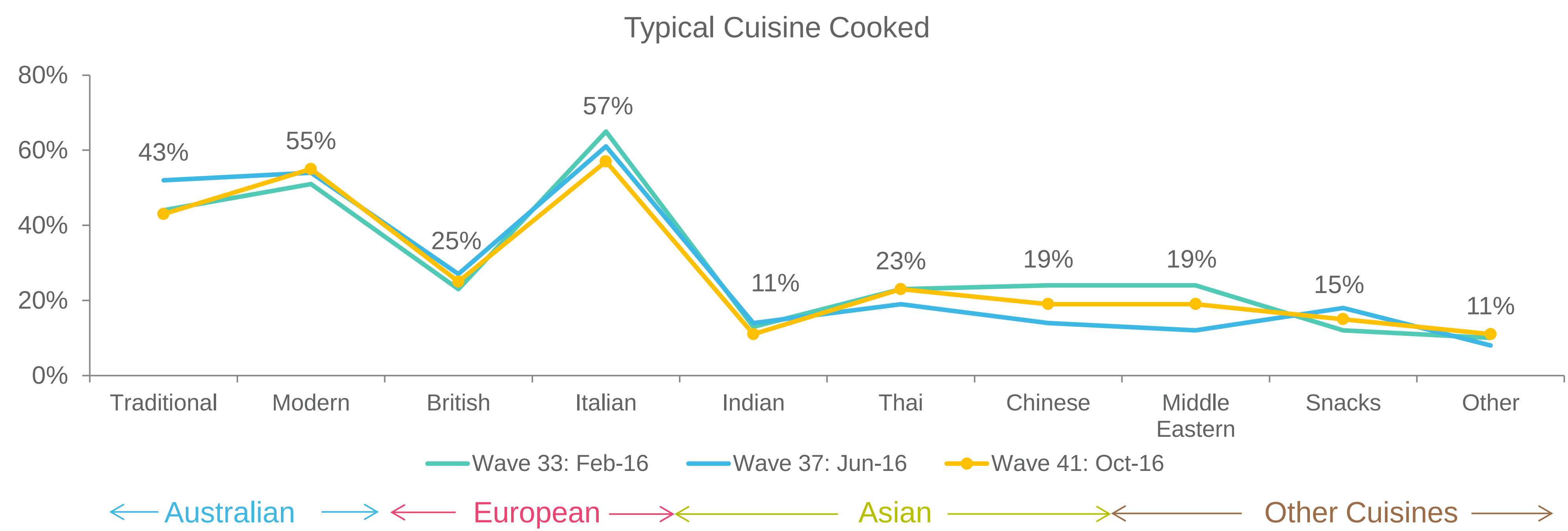
Italian and Australian cuisines are popular for parsley dishes. Consumption tends to occur during dinner and family meals, consistent with the past wave. Approximately one third of consumers (34%) use parsley when cooking a new recipe.

Top 5 Consumption Occasions

	Wave 37	Wave 41
Dinner	71%	68%
Family meals	67%	59%
Weekend meals	48%	48%
Weekday meals	49%	47%
Quick Meals	48%	45%

34% used parsley when cooking a new recipe

▲ 41%, Wave 37



Q10. What cuisines do you cook/consume that use parsley?
Q11. Which of the following occasions do you typically consume/use parsley?
Sample Wave 33 N=201, Wave 37 N=200, Wave 41 N=207

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

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

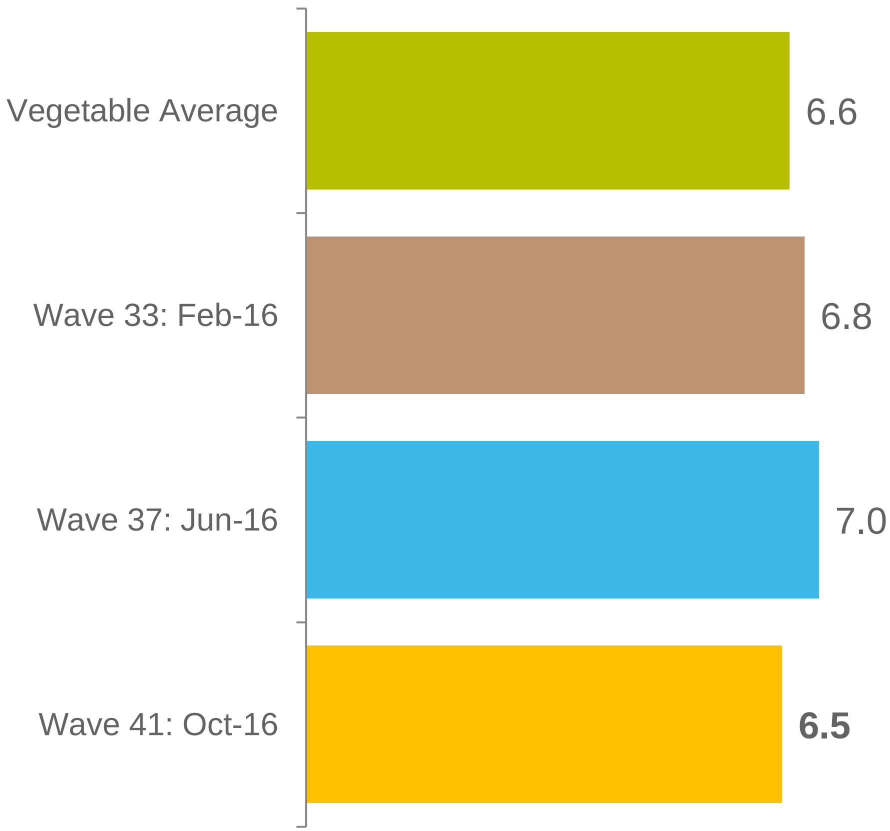
Accompanying Vegetables

Tomato	54% ▼
Potato	52% ▼
Onion	45% ▼
Carrot	36% ▼
Capsicum	31% ▲

Top 10 Cooking Styles			
	Wave 33	Wave 37	Wave 41
Raw	66%	56%	**62%**
Soup	46%	56%	**47%**
Stir frying	37%	42%	**35%**
Slow Cooking	25%	27%	**25%**
Frying	14%	18%	**19%**
Sautéing	24%	17%	**15%**
Other	12%	7%	**13%**
Baking	16%	19%	**12%**
Mashing	13%	17%	**11%**
Steaming	14%	12%	**10%**

Q9. How do you typically cook parsley?
Q10a. And when are you serving parsley which of the following do you also serve together with this?
Sample Wave 33 N=201, Wave 37 N=200, Wave 41 N=207

Knowing that parsley is grown in Australia is the most important provenance information for consumers. Both general provenance and Australian provenance declined since the last wave, with the former now sitting below the Vegetable Average.



8.0 ▽

Wave 37: **8.5**

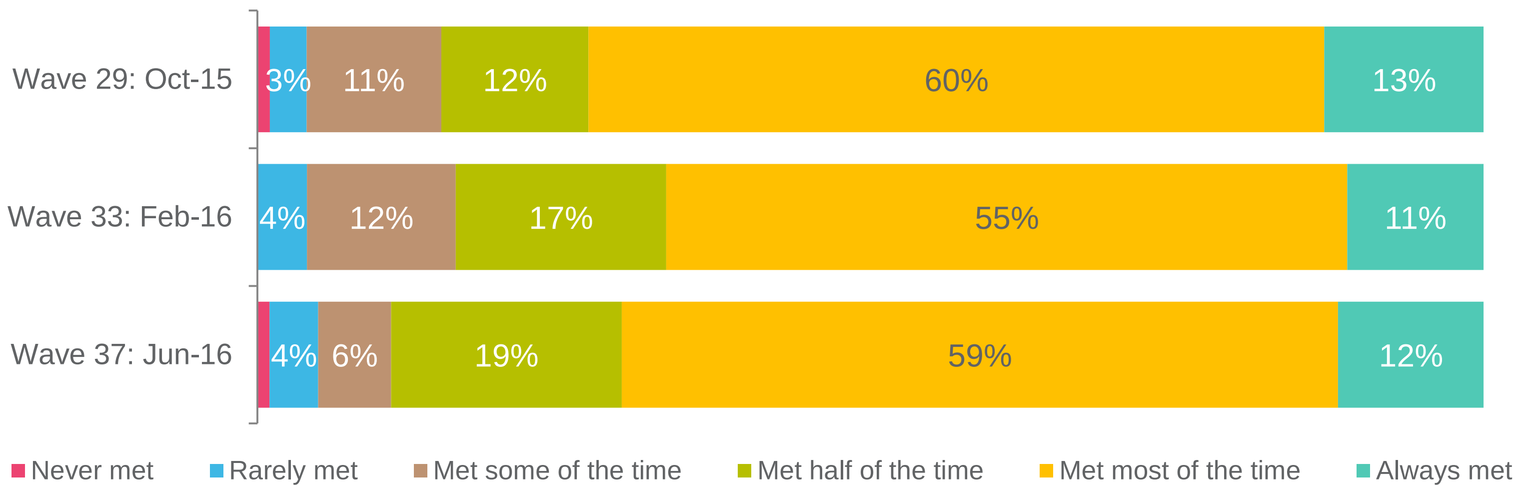
Q14. When purchasing parsley, how important is Provenance to you?
Sample Wave 33 N=201, Wave 37 N=200, Wave 41 N=207

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

Expected to stay fresh for **7.7** days

▼ 7.4 days, Wave 33
— 7.7 days, Wave 37

Expectations Met



Q12. How long do you expect parsley to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy parsley?
Sample Wave 33 N=201, Wave 37 N=200, Wave 41 N=207

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

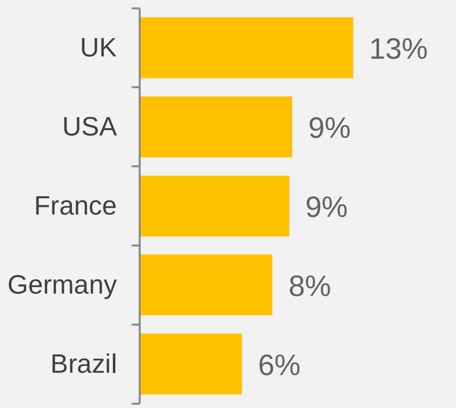
Parsley Product Launch Trends.

Parsley Global NPDs

July – October 2016

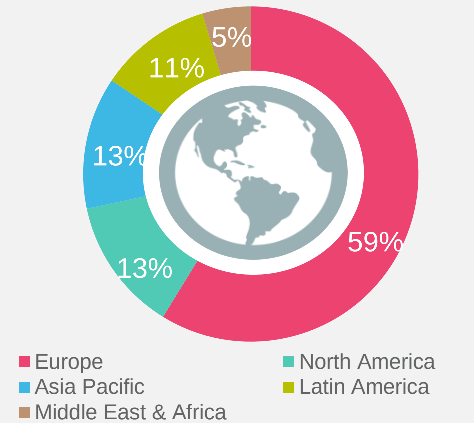
There were 1734 products launched in the past three months that contained Parsley. Europe was the key region for launches, with UK and USA being the main countries. Flexible packaging remained the most common format. Launches were predominately in the sauces & seasonings and meals categories.

Country

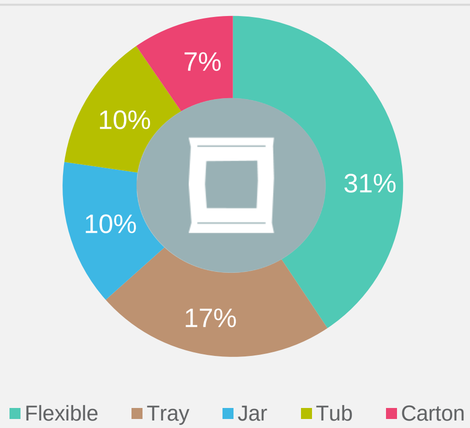


1734 Global NPDs

Region



Top Pack Formats



Categories

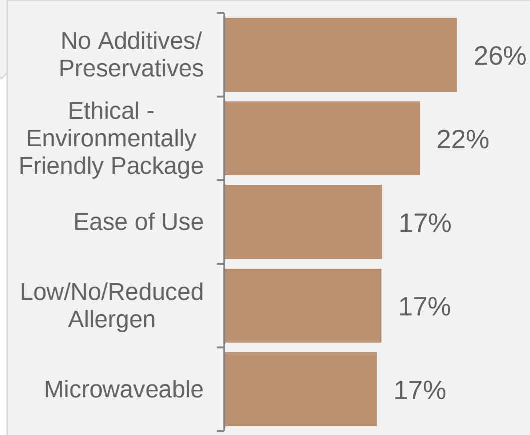
Sauces & Seasonings 22%

Meals 20%

Processed Products 14%

Snacks 14%

Top Claims



Parsley Product Launches:
Last 3 Months (July – October 2016)
Summary

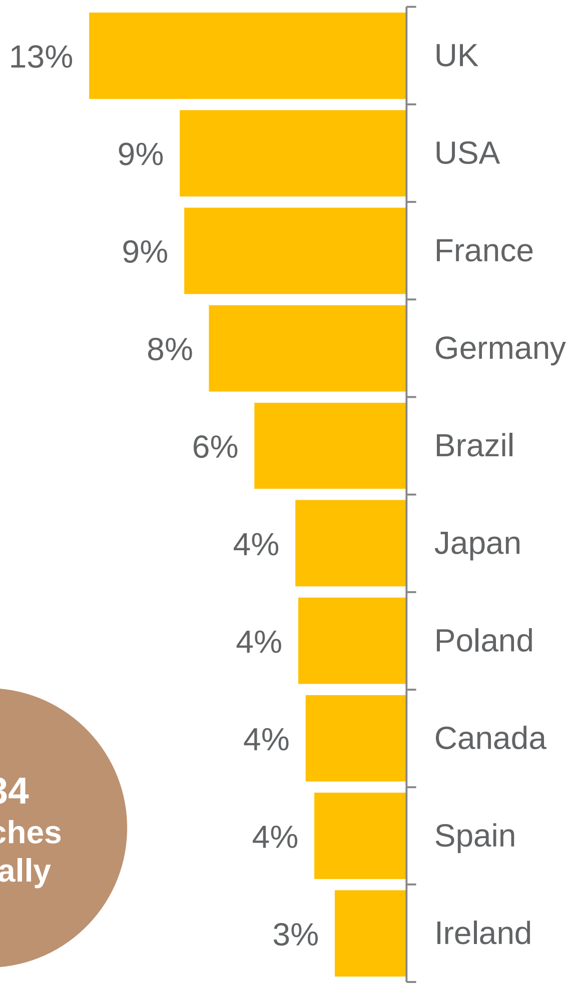
- A total of 1734 products containing parsley as an ingredient were launched globally in the last 3 months, which has declined since the previous quarter (1853).
- There were 33 parsley launches in Australia this quarter.
- Europe (59%) was clearly the top region for launches. Key countries for innovation were UK (13%), USA (9%), and France (9%).
- Flexible packaging was the widely used format for launches (31%), followed by tray formats (17%).
- Top categories for product launches were sauces and seasonings (22%), meals and meal centres (20%), and processed products (14%).
- Core claims for product launches globally included no additives/preservatives (26%), ethical – environmentally friendly package (22%), ease of use (17%) and low/no/reduced allergen (17%).
- The most innovative product was the parsley grinder launched in the USA. Other examples of products can be found at the end of the parsley trend report.

Source: Mintel (2016)

Parsley Launches
Country & Categories

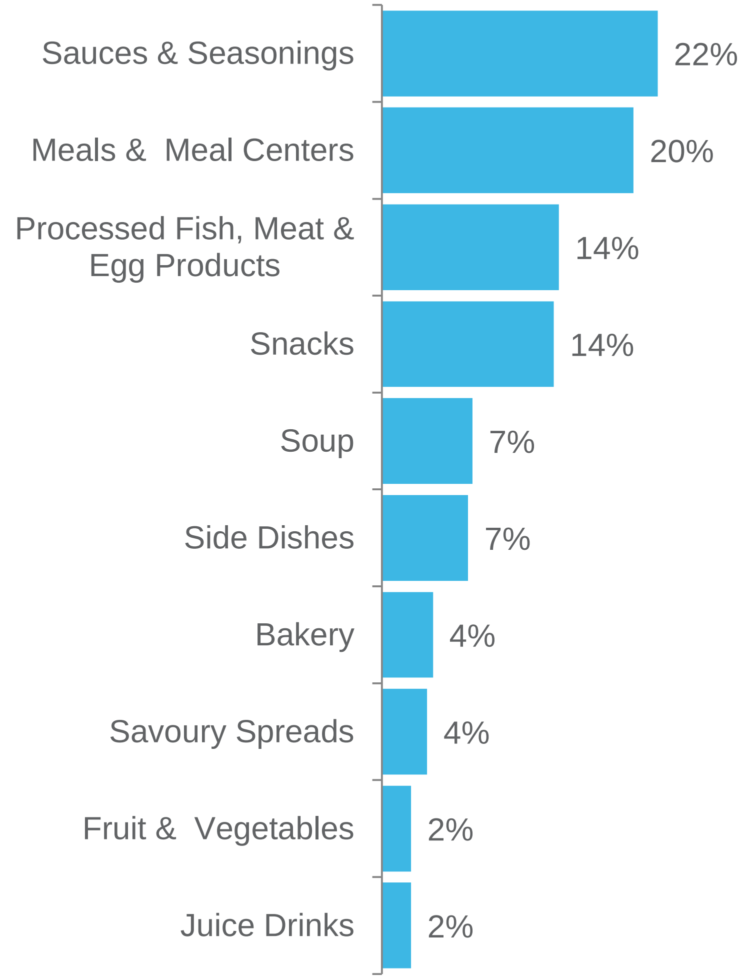
- The most active country for launches in the last 3 months was the UK, followed by USA and France.
- Sauces & seasonings and meals are the key categories for launches, followed by processed products and snacks.

Top Launch Countries



1734 Launches Globally

Top Launch Categories



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Parsley Launches

Top Claims & Pack Formats Used

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

Pack Formats Used

Global	Flexible	31%
	Tray	17%
	Jar	10%
Europe	Flexible	24%
	Tray	22%
	Jar	13%
North America	Flexible	39%
	Tray	12%
	Jar	11%

Top Claims Used

Global	No Additives/Preservatives	26%
	Ethical - Environmentally Friendly Package	22%
	Ease of Use	17%
Europe	No Additives/Preservatives	27%
	Ethical - Environmentally Friendly Package	23%
	Ease of Use	17%
North America	Low/No/Reduced Allergen	29%
	Gluten-Free	27%
	No Additives/Preservatives	27%

Innovative Parsley Launches:

L3M (July – October 2016)

TGI Fridays Bacon & Ranch Loaded Potato Bites (USA)

TGI Fridays Bacon & Ranch Loaded Potato Bites are shredded potatoes stuffed with apple wood bacon bits, ranch and habanero seasoning with a ranch dip packet. This USDA certified product is retailed in a 13.5-oz. pack.

Claims:
N/A

Frankly Fresh Chicken Fettuccini Alfredo Bowl (USA)

Frankly Fresh Chicken Fettuccini Alfredo Bowl is now available. This microwavable product has been sealed using HPP technology. It retails in a 36-oz. pack containing three 12-oz. bowls.

Claims:
Microwaveable

Olde Thompson Parsley Grinder (USA)

Olde Thompson Parsley Grinder is said to add flavor to meats, pasta, rice, veggies and soup. This kosher product retails in a 0.5-oz. pack.

Claims:
Kosher

Fina Panaderos Toasted Bread with Garlic and Parsley (Spain)

Fina Panaderos Pan Tostado con Ajo y Perejil (Toasted Bread with Garlic and Parsley) is now available. The product retails in a 160g pack.

Claims:
N/A

Source: Mintel (2016)

Innovative Parsley Launches:
L3M (July – October 2016)

Three Farmers Wild Ranch Pea Pops (Canada)

Three Farmers Wild Ranch Pea Pops are roasted green peas that have not been fried. This natural, sustainable and traceable product is crunchy, suitable for vegans, is a source of energy and is a high source of fibre. It is free from nuts, gluten, GMOs and cholesterol, and is low in fat. The snack retails in a 90g pack.

Claims:
Low/No/Reduced Cholesterol, High/Added Fiber, Low/No/Reduced Fat, Gluten-Free, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Product, Vegan, No Animal Ingredients, GMO-Free

Angulas Aguinaga Shrimp Skewers with Garlic (Belgium)

Angulas Aguinaga Brochettes de Crevettes à l'Ail (Shrimp Skewers with Garlic) have been added to the range. This ready product can be heated in the microwave and combined with pasta or rice. It is described as delicious and retails in a 145g pack containing four units.

Claims:
Microwaveable, Ease of Use

La Bella Italia Arrabbiata Pasta Mix (New Zealand)

La Bella Italia Arrabiatta Pasta Mix is now available. The seasoning mix retails in a 50g pack.

Claims:
N/A

Hoppity Poppity Creamy Cheese & Chives Tangy Popcorn (South Africa)

Hoppity Poppity Creamy Cheese & Chives Tangy Popcorn has been repackaged, and is now available in a newly designed 90g pack. The halal certified product is heated by air to pop and smothered lovingly with scrumptious seasoning.

Claims:
Halal

Source: Mintel (2016)

Innovative Parsley Launches:
L3M (July – October 2016)

Quescrem Cream Cheese with Garlic & Herbs Columbia)

Quescrem Queso Crema con Ajo y Finas Hierbas (Cream Cheese with Garlic & Herbs) is described as a pasteurised high fat white cheese with a unique texture and flavor. The product retails in a 200g pack.

Claims:
N/A

Sadia Pratos para Cozinhar Jamie Oliver Crunchy Chicken Fillet with Parmesan, Parsley and Garlic (Brazil)

Sadia Pratos para Cozinhar Jamie Oliver Filé Crocante com Parmesão e Mix de Salsinha e Alho (Crunchy Chicken Fillet with Parmesan, Parsley and Garlic) comprises breaded chicken, parmesan cheese, garlic and a touch of parsley, said to be crunchy on the outside and succulent on the inside. It is made with natural ingredients and animals that are well cared for, which are fed a balanced nutrition and are free from hormones and antibiotics.

Claims:
Ethical - Environmentally Friendly Package, Ethical - Animal, Hormone Free

London Falafel Traditional Falafel (France)

London Falafel Traditional Falafel is now available. The vegan and vegetarian product is 100% natural and free from diary, gluten, egg, nut, wheat, yeast, preservatives, colourants or additives. It is ready to eat and retails in a 220g pack containing eight units and bearing the Sugar Wise logo. This product was on display at SIAL 2016 in Paris, France.

Claims:
No Additives/Preservatives, All Natural Product, Kosher, Low/No/Reduced Sugar, Vegetarian, Halal, Gluten-Free, Low/No/Reduced Allergen, Vegan, Ease of Use, No Animal Ingredients

Pasta Factory Gnocchi Pesto with Nut & Cheese (South Africa)

Pasta Factory Gnocchi Pesto with Nut & Cheese is now available. The halal certified and microwavable product is to be simply heated and eaten and is suitable for home freezing. It is ideal as a quick meal and retails in a 1kg recyclable pack that serves three to four portions and bears the Facebook, Twitter and Instagram links and heating instructions.

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

Source: Mintel (2016)

Top Australian Parsley Launches:
L3M (July – October 2016)

Chicken Tonight Classic Honey & Mustard Sauce with Carrot & Onion

Rafferty's Garden Vegetable Risotto with Prebiotic Fibre Happy Tummies

Gourmet Delights Green Split Olives

Remano Tomato Mini Penne

The Spice People Gourmet Spices Mild Italian Spaghetti Herbs

McCain Healthy Choice Wholegrains Chicken & Mushroom Risotto with Freekeh and Brown Rice

Masterfoods Pour & Bake Creamy Cheesy Potato Bake Cooking Sauce

The Real Hotpot Aussie Angus Beef & Ale

Source: Mintel (2016)

In the Media.

General Vegetable News
(July – October 2016)

- Supermarket giant Coles has committed to sourcing an extra 6 million kilograms of Australian vegetables a year in a deal with food processor Simplot.
- The eight-year contract will source the vegetables from 240 growers in Tasmania, New South Wales and Queensland.
- Coles Managing Director John Durkan said the contract was an extension of the company's Australian first sourcing policy. "Before this agreement [the vegetables] came from overseas.” "So this 6 million kilos, we're replacing [vegetables] from overseas, to [vegetables grown] here in Australia".
- He said the contract was a 25 per cent increase in the volume of Australian grown frozen vegetables, which would take the total to 56 million kilograms each year.
- Simplot managing director Terry O’Brien said the extra volume for the new contract would be sourced from Simplot for the Coles and Birds Eye brands.
- Tasmanian vegetable grower Stuart Greenhill said the push by Australian consumers to demand local produce had helped secure the contract.

Source: www.abc.net.au

Commodity News
(July – October 2016)

- A pumpkin grown from what is believed to be the most expensive seed ever recorded was recently harvested and is expected to be the biggest pumpkin ever grown outdoors in the UK.
- Gardener, Matthew Oliver, has been nurturing the £1,250 seed which itself came from a pumpkin weighing over a tonne, at Hyde Hall in Chelmsford, Essex.
- The giant vegetable will be weighed this afternoon, with the Royal Horticultural Society anticipating it will weigh around 1330 lbs (603kg), around a third larger than the next heaviest outdoor-grown pumpkin on record.

www.telegraph.co.uk/

- A study has shown that both carrots and capsicum have been linked to glowing skin.
- Professor Roberts explains that the pigment carotenoid - which gives the veggies their bright hues - has been shown to slightly alter skin colour in a way that makes us appear visibly “more attractive”.
- To prove this, she conducted an experiment where ten people of different ethnic backgrounds and skin tones are asked to consume one whole capsicum and 150mL of carrot juice every day for six weeks. Their skin colour was measured with a spectrophotometer before and after, and a photo taken.
- Most involved in the experiment pointed to their after photo, in which their skin had a more golden, “glowing” tone, as more attractive, while the spectrophotometer also measured a noticeable difference in skin colour.

www.sbs.com.au/

- The cauliflower has become Britain’s newest culinary fad, with celebrity chefs and fashion-forward foodies flocking to the florets.
- It can be made into grains to replace rice or ground into so-called ‘cauli-flour’ and used in pizza bases, taco shells and even cakes and biscuits.
- Tesco says sales have soared by ten per cent in the past quarter and Sainsbury’s reports a 15 per cent surge from last year. It’s good news for suppliers and growers following 15 years of dwindling sales.

www.dailymail.co.uk/

- Sager Creek Foods Inc. of Walnut Creek, a subsidiary of Del Monte Foods Inc. in the United States announced a recall in September of approximately 15,000 shipped cases of primarily non-retail canned beans and peas because they could contain trace amounts of shellfish contamination.
- No illnesses have been reported in connection with this issue to date. There is no risk for people who do not have a shellfish allergy, the company stated.

www.foodsafetynews.com

Commodity News
(July – October 2016)

- Ocean Mist Farms will unveil the newest addition to its Season & Steam line, Sweet Baby Broccoli.
- The newest extension to the value-added fresh vegetable line is packaged in the innovative Steamfast microwavable pack. This packaging provides consumers with a convenient option to pre-season the broccoli right in its packaging, reseal the lock, and steam in the microwave.
- "Our Season & Steam bag addresses multiple culinary and consumer trends," stated Diana McClean, Director of Marketing. "We want to meet consumer demand and make Sweet Baby Broccoli easy and convenient to cook at home."

http://www.andnowuknow.com/

There was no silverbeet specific news to report this wave.

- Parsley is fast becoming Britain's herb of choice, with a 37 per cent rise in sales this year. A record 14.2 million pots, packs or bunches of the flat-leaf variety have been bought by shoppers in the past 12 months, according to Vitacress, a herb producer. Only coriander and basil sold more.
- It was previously seen as a garnish, but is increasingly used in healthy eating recipes. Analysis of the ten bestselling books found that it was the second most popular herb, featuring in 27 recipes in Cook Happy, Cook Healthy by Fearne Cotton, who uses it instead of coriander.

http://www.thetimes.co.uk/

Background & Methodology.

Background
& Setting the Scene.

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

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

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

This wave's report (Wave 41, October 2016) focuses on:

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

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

Online Methodology.

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

General Respondent Questions

Demographics

Vegetable Consumption

1/7 Commodities

Commodity Specific Questions

Category Health

Purchase & Consumption Habits

Price Perceptions & Average Spend

Triggers/Barriers to Purchase

Preparation Preferences

+ 2 Ad hoc Questions per Month

Sample.

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

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

To qualify for the questionnaire, respondents...

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

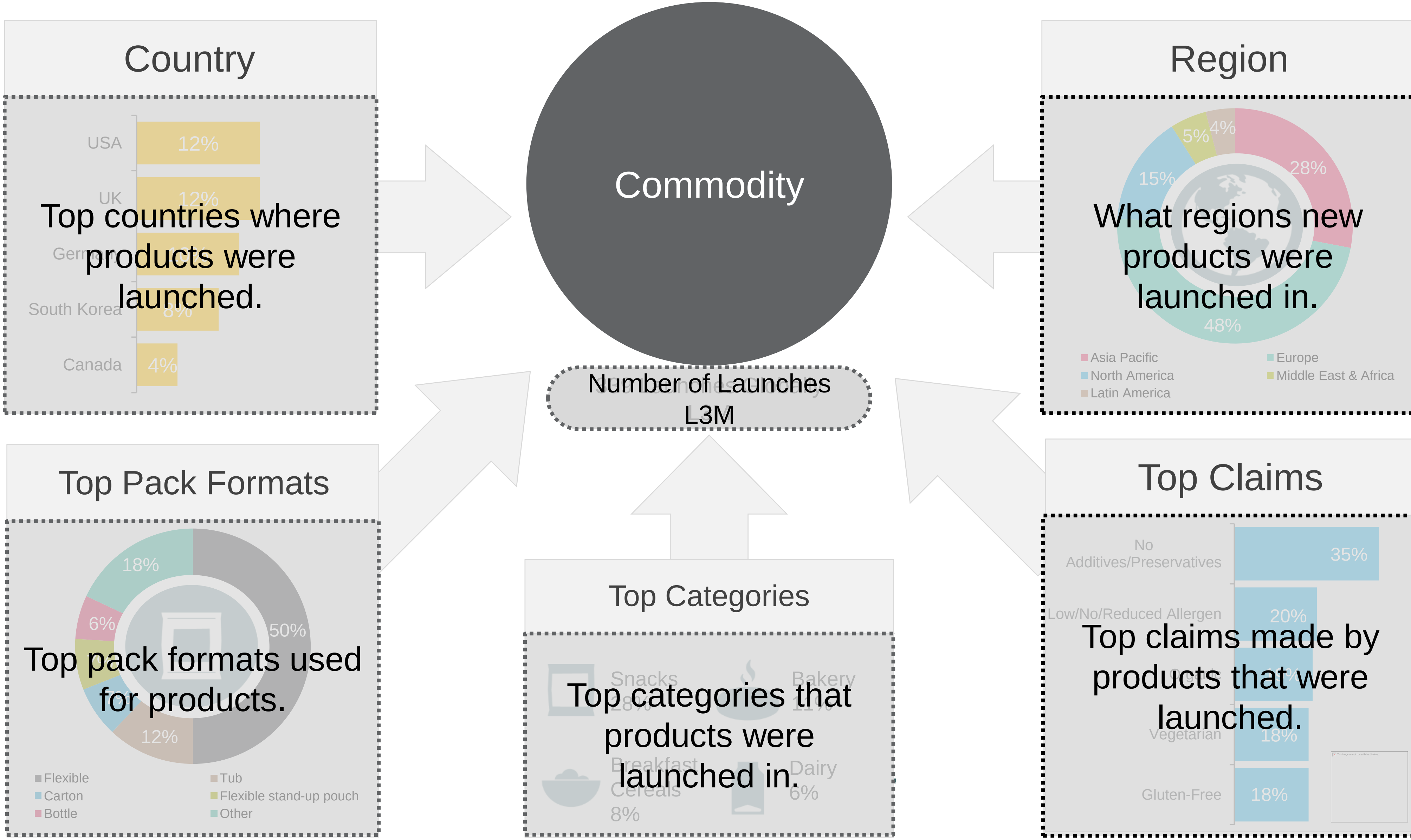
	Beans n=301	Carrot n=301	Cauliflower n=301	Pumpkin n=302	Baby Broccoli n=201	Silverbeet n=206	Parsley n=207
Gender							
Male	34%	34%	39%	36%	40%	35%	35%
Female	66%	66%	61%	64%	60%	65%	65%
Age							
18-24 y.o.	7%	6%	5%	5%	3%	3%	2%
25-34 y.o.	14%	10%	15%	9%	15%	7%	13%
35-44 y.o.	14%	14%	12%	17%	16%	16%	16%
45-54 y.o.	24%	23%	21%	27%	22%	21%	23%
55-64 y.o.	25%	30%	29%	29%	23%	24%	23%
65+ y.o.	16%	16%	17%	14%	20%	29%	24%
Household							
Single Income no Kids	22%	23%	19%	21%	26%	25%	23%
Double Income no Kids	16%	16%	18%	15%	20%	15%	19%
Young Families	11%	9%	9%	8%	9%	9%	11%
Established Families	23%	20%	19%	23%	23%	24%	20%
Empty Nesters	29%	33%	35%	34%	21%	28%	27%
Location							
New South Wales	22%	25%	22%	24%	18%	14%	22%
Victoria	22%	17%	19%	20%	15%	18%	19%
South Australia	15%	13%	15%	13%	19%	17%	11%
Queensland	19%	20%	19%	21%	16%	17%	18%
Western Australia	16%	17%	18%	15%	16%	14%	15%
Tasmania	4%	5%	3%	5%	8%	17%	7%
Australian Capital Territory	2%	3%	3%	3%	4%	2%	7%
Northern Territory	0%	0%	0%	0%	2%	1%	1%

Trends Research: Our Approach

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

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

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



Thanks.