Project Harvest Monthly Tracker Report.

Wave 42, November 2016

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

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

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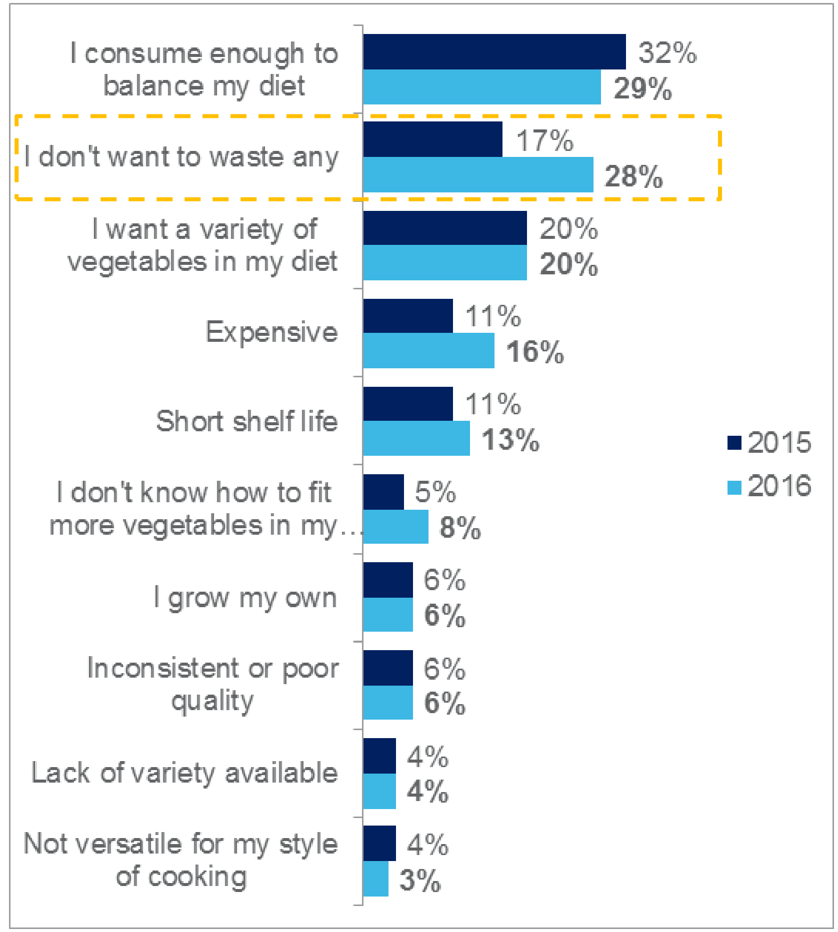
Contents.

Wave 42:
Executive Summary

Industry Insight

One year ago, the Wave 29 report for the Harvest Tracker featured insight about trends in social sentiment and the possible implications for the Australian vegetable industry. Within this, context was placed around the growing desire for “less waste” – trends illustrated in Harvest’s “barriers to purchase” data.

One year on, and Colmar Brunton has researched social sentiment once more, only to find that society’s need for “less” has continued to grow (+7%). This is predicted to continue increasing in prevalence over the next 3-5 years. The implication of such a shift in social values is that the associations most relevant to products or brands will change.



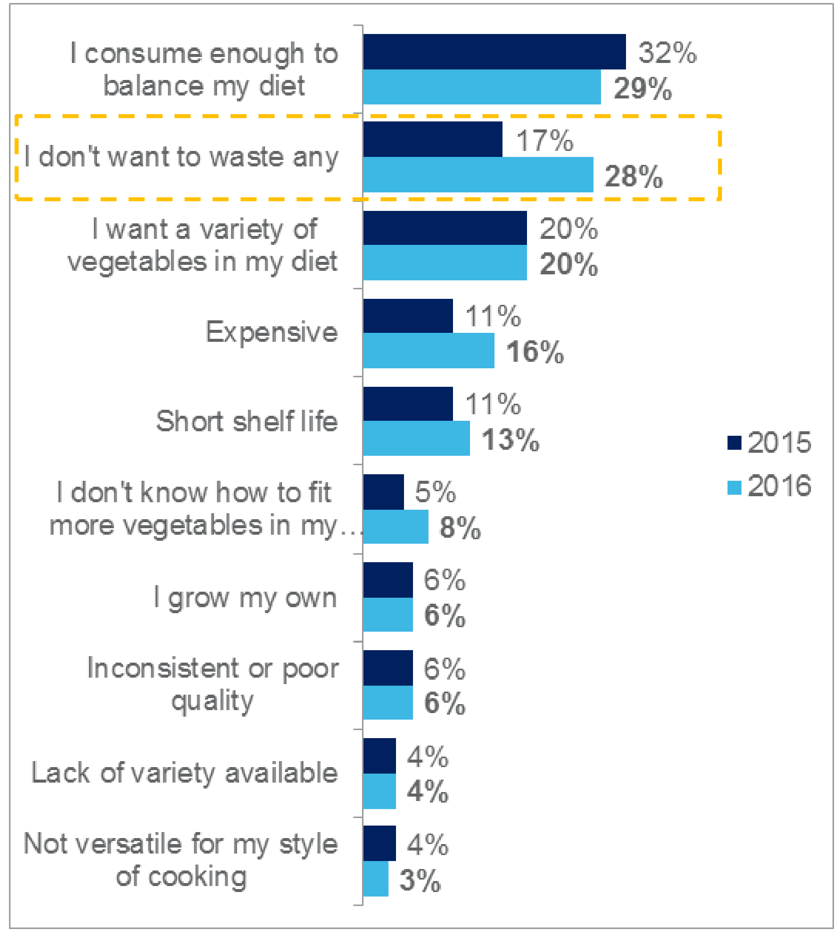
Industry Insight continued.

While brands viewed as contemporary today align with associations of the current predominant era of conformity, for example:

- Familiarity
- Provenance
- Safety and security
- Stability

Associations of the upcoming era of Rebellion will be:

- Clever and Innovative
- Simple and stylish
- Customised
- Courageous
- Less



Industry Insight continued.

The upcoming "rebellion" trends will provide the consumer with more control and better products and services that are customised for them. Early examples of rebellion include services such as Uber, Youi and Air BNB; campaigns such as McDonalds "Create Your Taste" and Latitude's "You can do better"; products such as those offering natural fortification or improved longevity; and retail services such online and zero waste platforms. Example of products already pushing into the Rebellion Era of "less" and "customisation" include:

O I M Tea

A tea designed for expectant mothers

Oishii Vitamin Series Energy Drink

Natural magnesium replacement for caffeine to reduce fatigue

Veg Press Juicery

Cleansing properties from Kale, Spinach, Celery, Celery and Coriander

Ethylene-Absorbing Packaging

Extends the shelf life of products such as tomatoes

Industry Insight continued.

So in this growing era of "less" what can the vegetable industry do to ensure it is delivering to consumer needs? Harvest results show that 36% of consumers think that the longevity, freshness and shelf-life of the fresh produce they buy could be increased; 27% suggest the availability of smaller portions and 17% want to know alternative uses for the produce they discard. Actioning this through Smart Packaging, Best Before dates, shorter time to shelf, specific storage and usage information at point of purchase, as well as smaller or customised portions are all ideas that can be built upon to help reduce the proportion of consumers who feel helpless against waste, as well as the amount of waste itself.

Customisation on the other hand can be achieved for a specific commodity (and products in which it is an ingredient) through calling out its specific vitamins and minerals, the specific type of consumer it will suit, or the kind of ailment it will help abate. Look out for convenient retail channels as well. And finally, if you remember one thing, remember this: products that will succeed in the future will offer more choice, higher convenience, less cost and less waste.

Broccoli Grower Action Plan.

Wave 42 Fast Facts – Broccoli

- There are high levels of satisfaction and endorsement for broccoli.
- On average broccoli is purchased 5 times per month and consumed 10 occasions per month. Mainstream retailers are the main purchase locations.
- Consumers typically purchase 800g of broccoli per occasion, a slight increase from the previous wave. Broccoli is perceived to be relatively good value for money. Individual heads of broccoli are the preferred format.
- National pricing analysis revealed an average of $3.72 per kg, which is noticeably lower than prices recorded in July 2016 ($5.37 per kg).
- Overall awareness of broccoli types remains low. Nearly two thirds of consumers are unable to recall any variety.
- The key motivations for purchasing broccoli are health and ease of preparation. The main barriers to purchase are not wanting to waste any and already consuming enough.
- Broccoli is expected to remain fresh for just over a week. Expectations of freshness are increasingly being met all of the time.

$3.72 was the recalled last spend on broccoli in November 2016.

1.

Insight:

Both purchase and consumption frequency have increased over the last three waves.

Short Term Recommendation:

To continue strong interest in broccoli past peak season, look to encourage climate appropriate recipes and cooking ideas. There is opportunity to develop new products including juicing packs with carrots or shredded broccoli slaw products.

2.

Insight:

There was a significant increase in broccoli being consumed as a quick meal.

Long Term Recommendation:

Investigate the potential to package broccoli florets. This format will reduce preparation time for consumers and provide growers with a value-add proposition. As per the Industry Insight, look to packaging formats that increase shelf life i.e. Ethylene-Absorbing Packaging.

Chilli Grower Action Plan.

Wave 42 Fast Facts – Chilli

- Chillies hold strong importance to consumers and are likely to be recommended to family and friends. There is strong future purchase intent for chillies.
- Chillies are purchased 4 times a month and consumed on 12 occasions per month. Purchase is from mainstream and specialist retailers.
- Consumers generally purchase 400g of chillies, with recalled last spend at $3.80. Overall, chillies are perceived as relatively good value for money, slightly increasing this wave.
- Pricing analysis revealed the average national price for long red chillies was $19.56 per kg, relatively consistent with prices in July 2016.
- There is a high level of recall for chilli varieties. Jalapeno and birds eye have the greatest awareness amongst consumers.
- Main triggers for purchasing chillies are taste and to use as an ingredient in dishes. The key barriers to purchase are not wanting to waste any and consuming enough for their needs.
- Chillies are expected to remain fresh for approximately 11 days, and this freshness is increasingly being met all of the time.

12.4 is the average number of times chillies are consumed per month.

1.

Insight:

There is an uplift in purchase from markets this wave.

Short Term Recommendation:

Markets are becoming more popular and increasing over time due to the range of chilli varieties available. Look to diversify distribution of chilli varieties across all purchase channels, not only in mainstream retailers.

2.

Insight:

Chillies are perceived to be good value for money, yet only one in five are regularly purchasing them.

Long Term Recommendation:

Encourage consumers to trial chillies through substitution education. For example, if a recipe uses paprika, educate consumers that they can substitute for a mild chilli such as Banana Chilli, providing the same flavour but with fresh ingredients.

Lettuce Grower Action Plan.

Wave 42 Fast Facts – Lettuce

- Lettuce holds high levels of importance, satisfaction and endorsement with consumers.
- Lettuce is purchased on average 4 times per month and consumed approximately 15 times per month. Purchase is primarily from mainstream retailers.
- On average, consumers are purchasing 700g of lettuce, which is slightly higher than the previous wave. Recalled last spend was $2.90. Value for money is perceived as relatively good.
- Price tracking revealed an average price of $2.39 per Iceberg lettuce head. This is lower than prices from July 2016 (3.24 each).
- There is a high level of awareness of lettuce types, especially Cos and Iceberg.
- The main motivations for purchasing lettuce are complementing other food and health. Not wanting to waste any and already consuming enough are the key barriers to purchase.
- Lettuce is expected to stay fresh for just over a week. Expectations of freshness are being met most of the time.

184 launches

number of global product launches containing lettuce over the last three months.

1.

Insight:

Perceptions of short shelf life are increasing as a barrier to future purchase of lettuce.

Short Term Recommendation:

Look to provide packaging options which increase shelf life and freshness expectations of lettuce i.e. mini whole lettuce packs and shredded lettuce.

Investigate supply chain for transportation efficiencies.

2.

Insight:

There were no products launched in Australia containing lettuce over the last three months.

Long Term Recommendation:

Investigate New Product Development (NPD) for lettuce which specifically focuses on ease of use – the top claim globally on new products containing lettuce. Products may include fresh salads, burrito kits and wraps.

Sweet Corn Grower Action Plan.

Wave 42 Fast Facts – Sweet Corn

- Sweet corn holds high consumer sentiment, above the Vegetable Average, with future purchase intent noticeably increasing this wave.
- Purchase frequency of sweet corn is around 4 times per month and on average sweet corn is consumed on 7 occasions per month.
- On average, consumers purchase 1.0kg of sweet corn, with recalled last spend $4.30. Perceived value for money is good (6.5/10).
- Analysis of pricing nationally revealed an average price of $1.28 per cob, which has declined since July 2016 ($1.52 per cob).
- Awareness of sweet corn remains very low, with the large majority of consumers unable to recall a type.
- Taste and the whole family likes sweet corn are the primary triggers to purchase. Wanting a variety and not wanting to waste any are the main barriers to purchase.
- Consumers expect sweet corn to remain fresh for approximately 8 days, and this longevity is likely to be met most of the time.

53% of consumers purchase sweet corn because the whole family likes them.

1. Insight:

There has been an increase in consumption frequency and average weight of purchase for sweet corn. The whole family liking them has also strengthened as a trigger to purchase.

Short Term Recommendation:

Capitalise on sweet corn's rise in popularity by providing pre-cut, tri-coloured corn cobs which will increase its appeal towards children.

2. Insight:

Consumers intend to increase their purchase for sweet corn in the future, rising from 13% to 21% this wave.

Long Term Recommendation:

Reducing the impact of barriers to increased purchases, such as consumers wanting a variety of vegetables will encourage greater purchase.

Look to package sweet corn with other popular vegetables, such as carrots and potatoes, to increase perceptions of variety.

Green Peas Grower Action Plan.

Wave 42 Fast Facts – Green Peas

- Green peas hold high levels of consumer sentiment across all measures and are likely to increase their purchase in the future.
- Green peas are purchased on average 5 times per month and consumed on 10 occasions per month. Purchase is primarily from mainstream retailers.
- On average, consumers are purchasing 700g of green peas, which is consistent with the previous wave. Recalled last spend was $4.10. Green peas are perceived to be good value for money (6.5/10).
- Price tracking revealed an average price of $13.97 per kg of snow peas, which has declined this wave ($15.47 per kg in July 2016).
- Approximately half of consumers are unable to recall a type of green pea. Snow Peas and Snap Peas have the highest level of recall.
- The main motivations for purchasing green peas are taste and health. Price and already consuming enough are the key barriers to purchase.
- Green peas are expected to stay fresh for approximately 9 days once purchased. Expectations of freshness are being met at least most of the time.

18% of consumers used green peas when cooking a new recipe.

1.

Insight:

Approximately one fifth of consumers used green peas when cooking a new recipe.

Short Term Recommendation:

Provide consumers with recipe ideas on-pack or at point of sale. These may include recipes outside of their current repertoire such as roasted whole peas with bacon, pesto snap peas, or pea, mint & chilli dip.

2.

Insight:

There has been an increase in green peas being consumed as snacks and quick meals.

Long Term Recommendation:

Look to the current popularity of pea protein and investigate opportunities for New Product Development (NPD) in this area. Pea protein can be utilised across most snacking products, and provides a number of nutritional benefits to the product; increasing its appeal to consumers.

Kale Grower Action Plan.

Wave 42 Fast Facts – Kale

- There are high levels of interest in kale, with consumers likely to recommend it to family and friends. There is strong future purchase intent, with over a quarter of consumers indicating they intend to increase the amount they currently purchase.
- On average, kale is purchased 4 times per month, and consumed 8 occasions per month.
- On average, consumers purchase 700g of kale. Value for money is perceived to be fair.
- Analysis of pricing nationally revealed an average price of $4.03 per bunch, consistent with the previous waves.
- Awareness of kale varieties declined this wave, with 67% of consumers are still unable to recall a type.
- Health and nutrition are the primary triggers to purchase. Wanting a variety and not wanting to waste any are the main barriers to purchase.
- Consumers expect kale to remain fresh for a week, and this longevity is likely to be met most of the time.

$3.80 was the recalled last spend on kale in November 2016.

1.

Insight:

Kale is more likely to be used to complement other food, which is strengthening as a trigger to purchase.

Short Term Recommendation:

Consumers are open to incorporating kale into their current cooking repertoire. There is an opportunity to package kale with other leafy vegetables which can be used together in a dish.

2.

Insight:

Just over one quarter of consumers eat kale during lunch.

Long Term Recommendation:

It is important to encourage consumers to eat vegetables outside of the dinner occasion. Kale easily fits into consumers' lunch repertoire. Providing pre-packaged options or smaller varieties that can easily be picked up and utilised for a lunch meal are crucial for meal occasion growth.

Leek Grower Action Plan.

Wave 42 Fast Facts – Leek

- Consumer sentiment for leeks are in line with the Vegetable Average.
- Leeks are purchased on average twice per month and consumed four times per month, relatively consistent with the previous wave. Purchase is primarily from mainstream retailers.
- On average consumers are purchasing 700g of leek. Recalled last spend was $3.20, with value for money perceived to be fair. Leeks are typically purchased individually.
- Price tracking revealed an average price of $2.10 per leek, relatively consistent with past waves.
- Awareness of leek types is very low, with 84% of consumers unable to recall a type.
- The main motivations for purchasing leeks are to use as an ingredient in dishes and great taste. Price and already consuming enough are the key barriers to purchase.
- Leeks are expected to stay fresh for 9 days. Expectations of freshness are increasingly being met all of the time.

59% of consumers cook leeks in soups.

1.

Insight:

Taste and ease of preparation are increasing as triggers to purchase leeks.

Short Term Recommendation:

Providing consumers with information about the flavour leek will add to a dish will encourage trial. Consumers understanding an easy substitute (i.e. use a leek instead of a shallot) will also go a long way in converting purchase.

2.

Insight:

There is a decline in not wanting to waste any as a barrier to future purchase of leeks. Additionally, expectations of freshness are increasingly being met all of the time.

Long Term Recommendation:

Continue educating consumers on utilising the whole leek as well as communicating expected length of freshness – consumers are understanding the message currently being communicated.

Wave 42:
Response to Ad hoc Questions

Less than half of consumers drink juices containing vegetables, with greater consumption frequency for fruit juices. Those that do drink vegetable juices consume them on average one to two times per month.

Opportunity to platform vegetables juices as the *healthy* drink, with mass consumers turning away from fruit juice because of the sugar content.

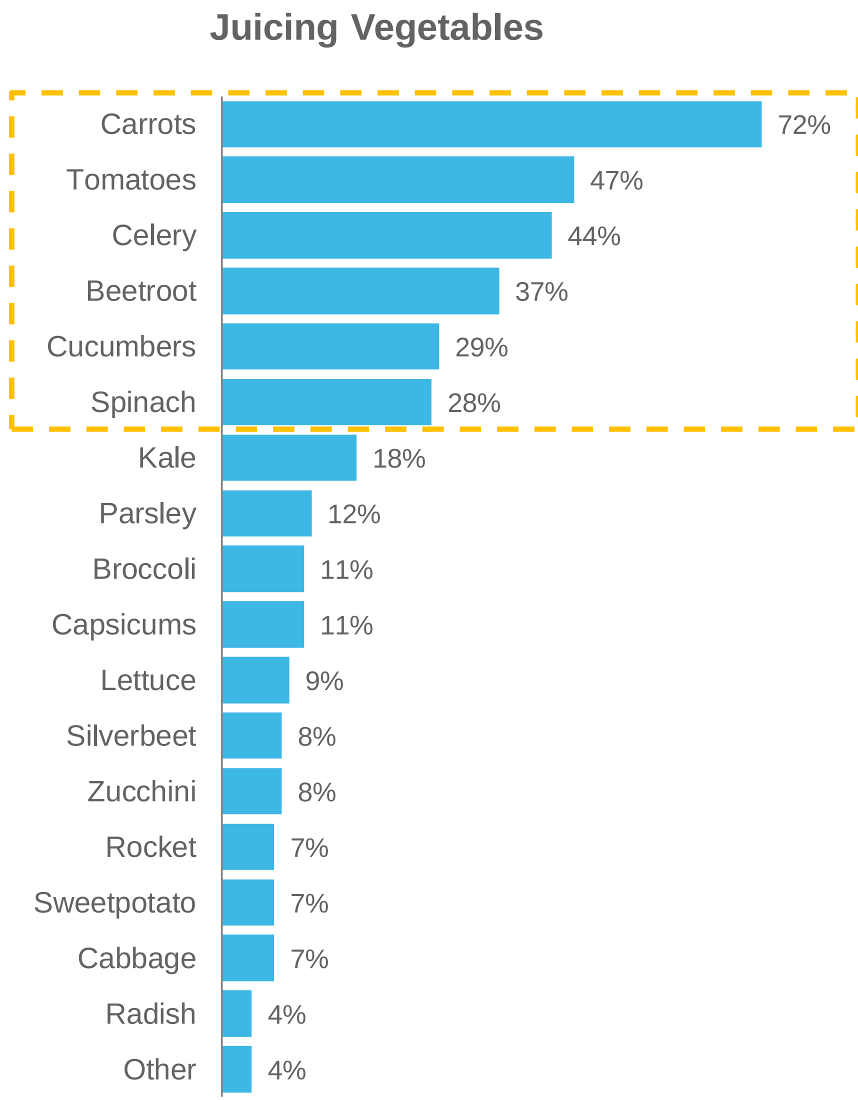
	Homemade fresh fruit juices	Homemade fresh vegetable juices	Homemade fresh fruit & vegetable juices	Store bought freshly squeezed/ cold pressed fruit juices	Store bought freshly squeezed/ cold pressed vegetable juices	Store bought freshly squeezed/ cold pressed fruit & vegetable juices	Pre-packaged fruit juices	Pre-packaged vegetable juices	Pre-packaged fruit & vegetable juices
Average Consumption Frequency (Per Month)	**2.7**	**1.8**	**1.7**	**3.1**	**1.2**	**1.2**	**4.4**	**1.4**	**1.3**
Every day	5%	3%	3%	6%	2%	2%	8%	2%	2%
2-3 times per week	7%	6%	4%	7%	3%	3%	12%	5%	4%
Once a week	7%	3%	6%	8%	3%	4%	11%	4%	4%
Once a fortnight	4%	3%	2%	6%	3%	3%	8%	4%	3%
Once every 3 weeks	2%	2%	3%	4%	3%	2%	5%	2%	3%
Once a month	5%	3%	3%	6%	4%	4%	5%	4%	3%
Once every 2-3 months	6%	2%	3%	7%	4%	4%	9%	4%	4%
Once every 4-6 months	5%	2%	3%	6%	3%	3%	5%	3%	3%
Less often than every 6 months through to once a year	9%	6%	6%	8%	6%	6%	7%	8%	8%
Less often than once a year	12%	13%	12%	9%	9%	9%	7%	9%	10%
Never	38%	56%	56%	35%	60%	58%	24%	57%	56%

AH1. How often do you consume the following types of juices?
Total Respondents N=632

Carrots are the most popular juicing vegetable.

Tomatoes, celery and beetroot are also commonly juiced vegetables.

Like soup packs, there is an potential to supply juicing packs that contain a variety of vegetables with recipe ideas. Call out serve of veggies per serving to encourage purchase.



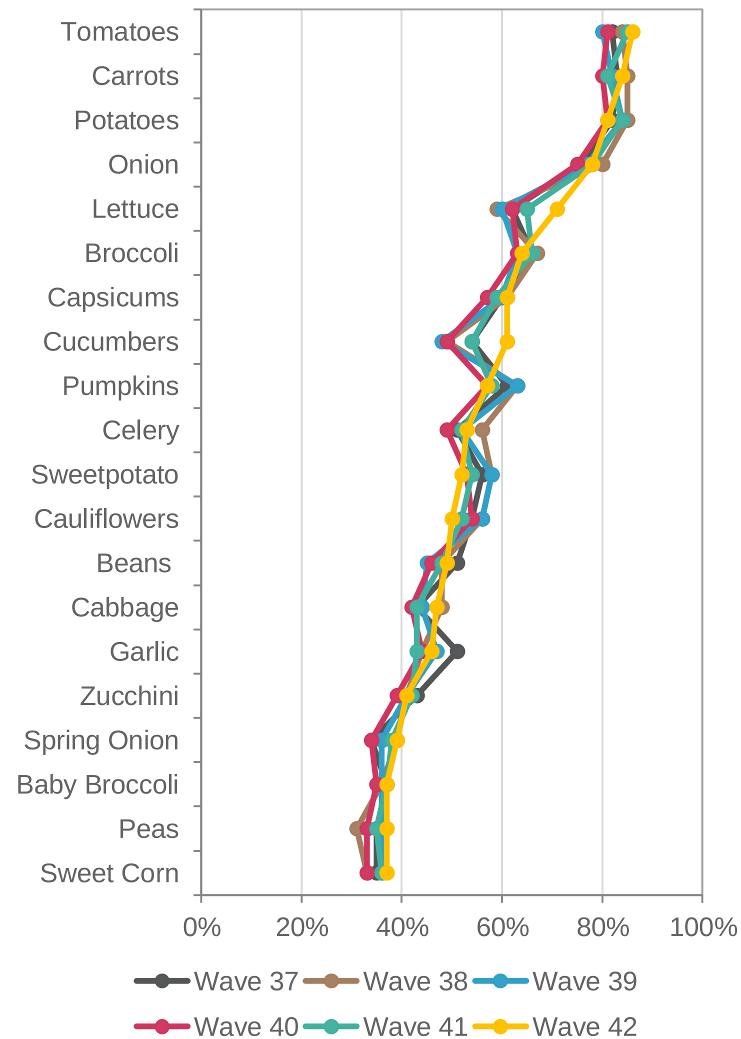
AH2. You said that you consume juices with fresh vegetables, which vegetables do you prefer to use?
Base n=392

Wave 42: Overall Vegetable Tracking

Top 20 Vegetables Purchased Last Month

Tomatoes, carrots and potatoes continue to be the staple vegetables most popular with consumers.

The biggest increases in purchase this month were cucumbers and lettuce, which is attributed to the warmer weather.



Sample Wave 42 N=1415 *(base in higher as Q appears in Screener)*
S8. Which of the following fresh vegetables have you purchased in the last month?

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Category Health Explained.

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

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

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

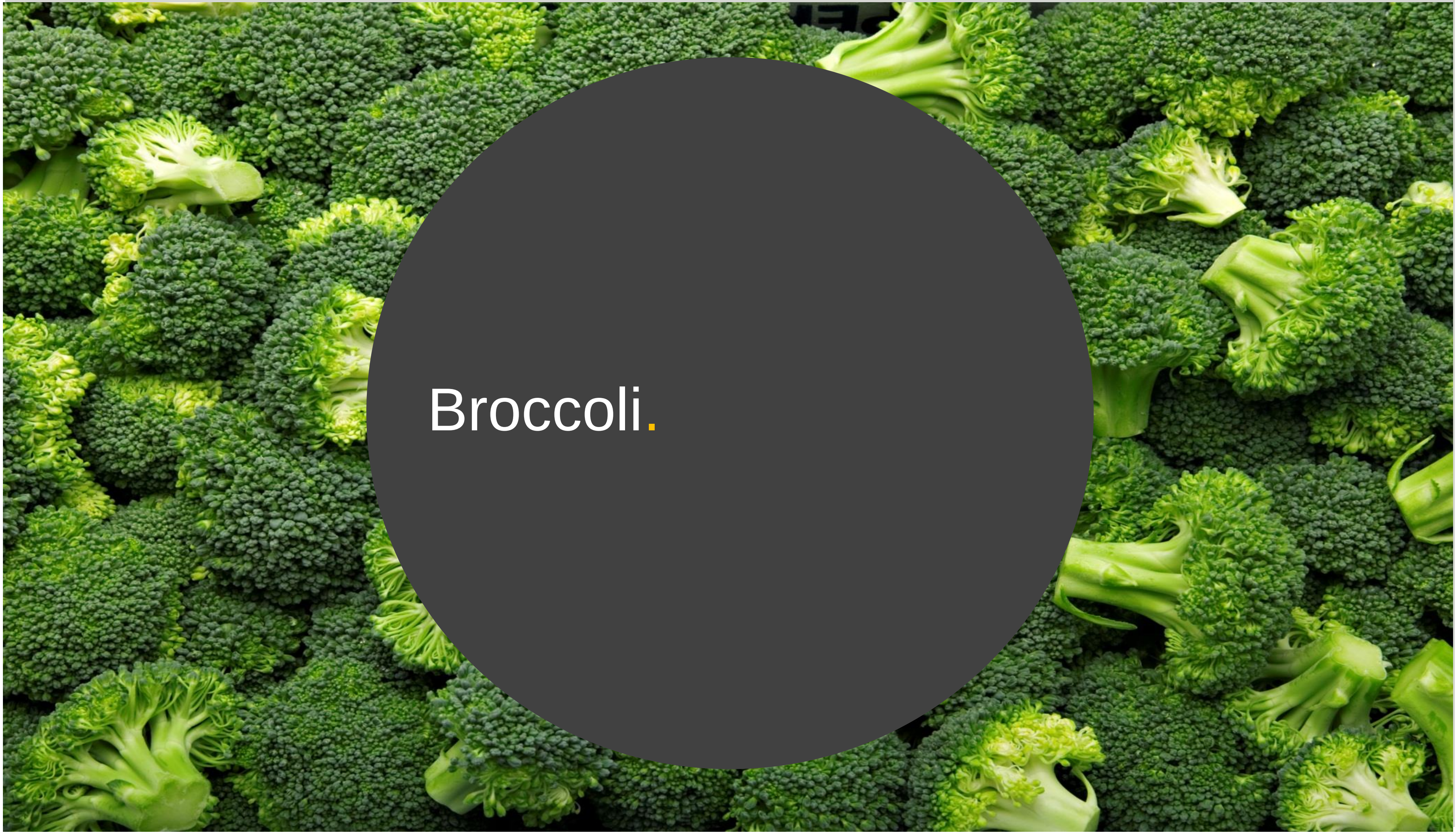
Category health and consumer sentiment remains relatively strong across all vegetables. Consumer satisfaction is particularly high for broccoli, lettuce and green peas compared with the Vegetable Average.

Kale and chillies have strong future purchase intent, with intent to increase purchase of sweet corn rising from 13% to 21% this wave.

	Broccoli	Chillies	Lettuce	Sweet Corn	Green Peas	Kale	Leek	Vegetable Average
Importance	6.5	6.9	6.9	6.9	7.1	6.4	5.9	6.4
Satisfaction	7.0	6.9	7.2	6.9	7.0	6.5	6.7	6.7
Endorsement	7.2	7.4	7.1	7.7	7.4	7.1	7.0	7.0
Interest (New Varieties)	6.2	7.3	6.2	6.8	6.8	6.7	6.0	6.4
Future Purchase								
More	13%	23%	17%	21%	20%	25%	11%	16%
Same	86%	76%	82%	78%	78%	72%	88%	83%
Less	1%	1%	1%	2%	1%	3%	0%	1%

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

Broccoli.



Broccoli consumption and purchase frequency both continued to increase this wave.

Purchase is typically from mainstream retailers, with specialist vegetable retailers also a popular channel.

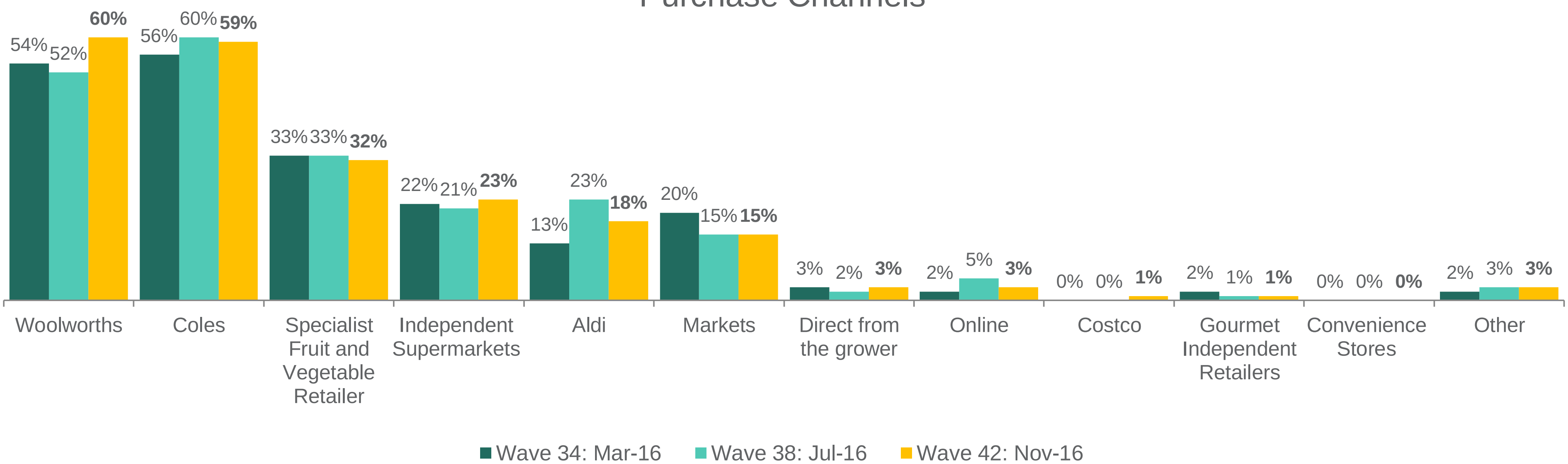
Average Purchase **4.6** times per month

▼ 3.9 times, Wave 34
▼ 4.1 times, Wave 38

Average Consumption **10.4** times per month

▼ 9.5 times, Wave 34
▼ 10.3 times, Wave 38

Purchase Channels



Q1. On average, how often do you purchase <commodity>?
Q2. On average, how often do you consume <commodity>?
Q5. From which of the following channels do you typically purchase <commodity>?
Sample: Wave 34 N=303, Wave 38 N=302, Wave 42 N=315

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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 **800g** of broccoli, which is slightly higher than the previous wave.

800g, Wave 34
700g, Wave 38

Recalled last spend

The average recalled last spend in November was **$3.50**, which is consistent with the previous wave.

$3.30, Wave 34
$3.50, Wave 38

Value for money

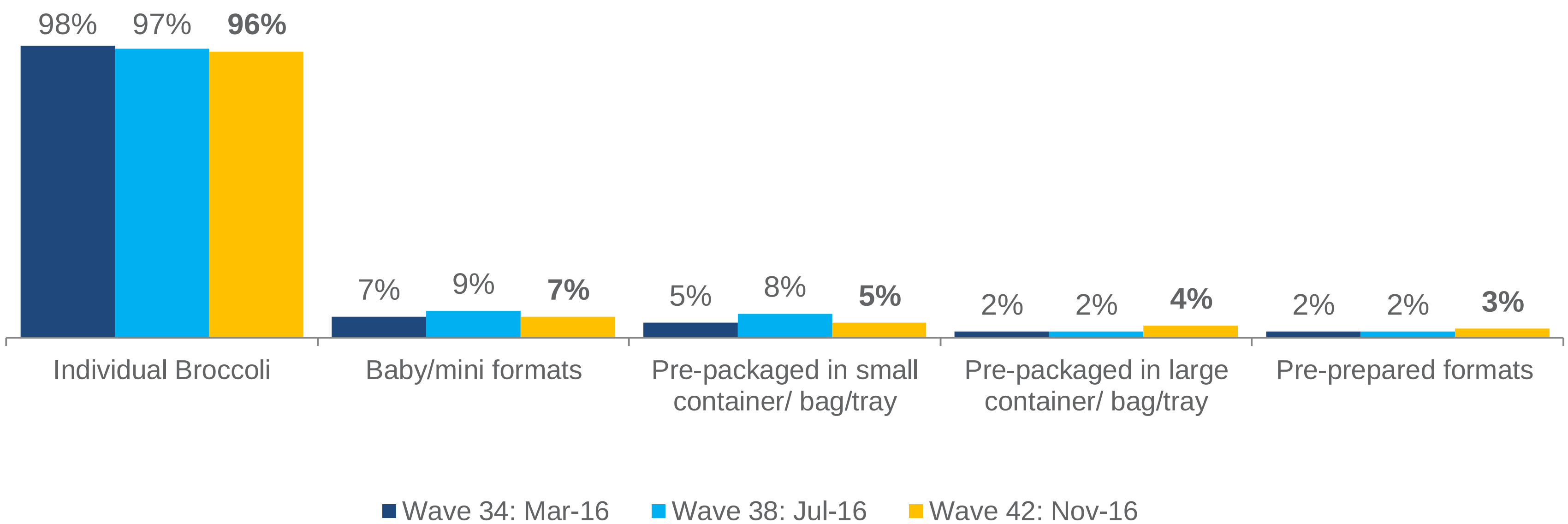
On average, consumers perceived broccoli to be relatively good value for money **(6.2/10)** which is consistent with the previous wave.

6.4/10, Wave 34
6.2/10, Wave 38

Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample: Wave 34 N=303, Wave 38 N=302, Wave 42 N=315

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

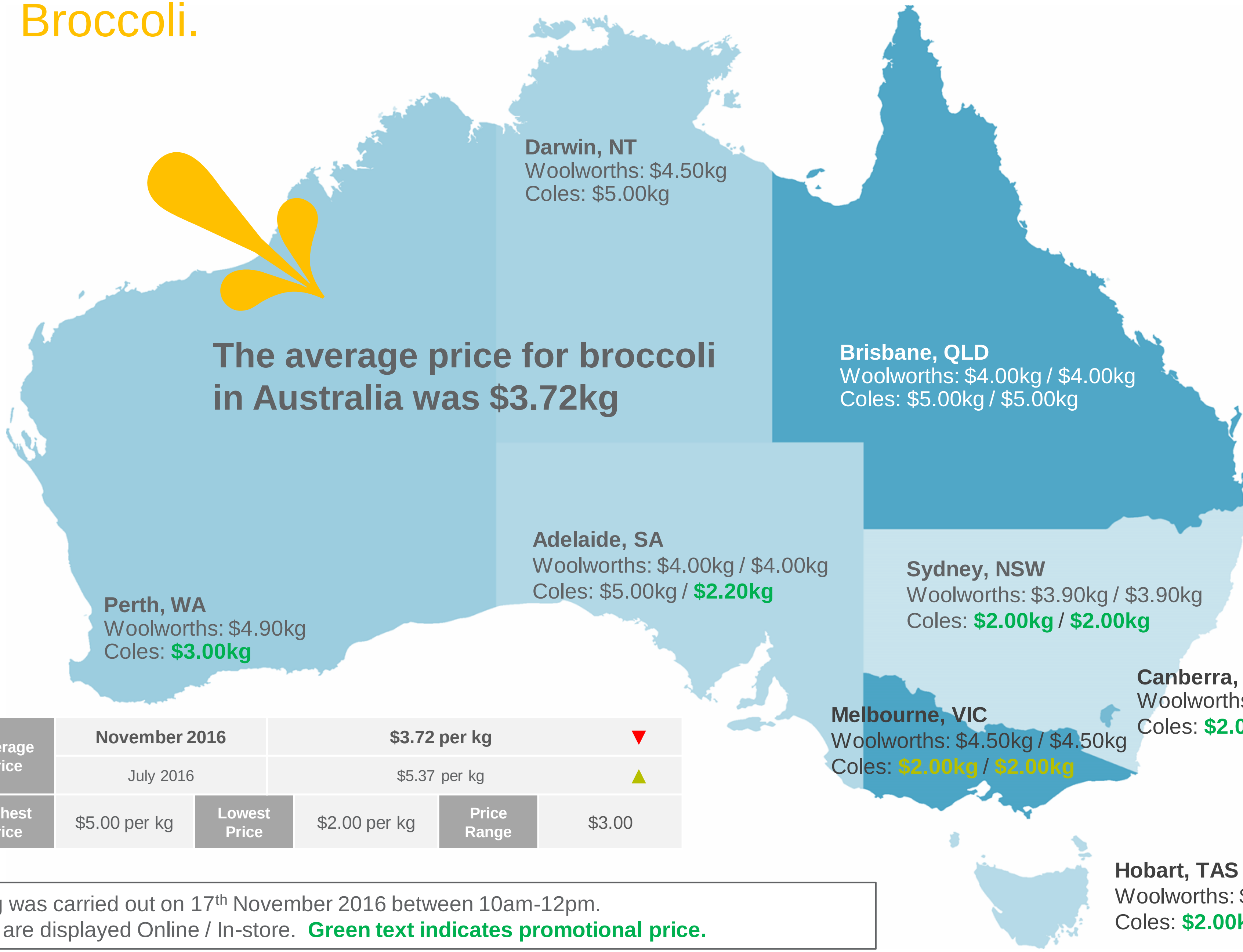
Individual broccoli heads are the main format purchased by consumers. Pre-packaged formats in small and large containers, bags and trays are also purchased options.



Q4b In what fresh formats do you typically purchase Broccoli?
Sample: Wave 34 N=303, Wave 38 N=302, Wave 42 N=315

Online and In-store Commodity Prices.

Broccoli.

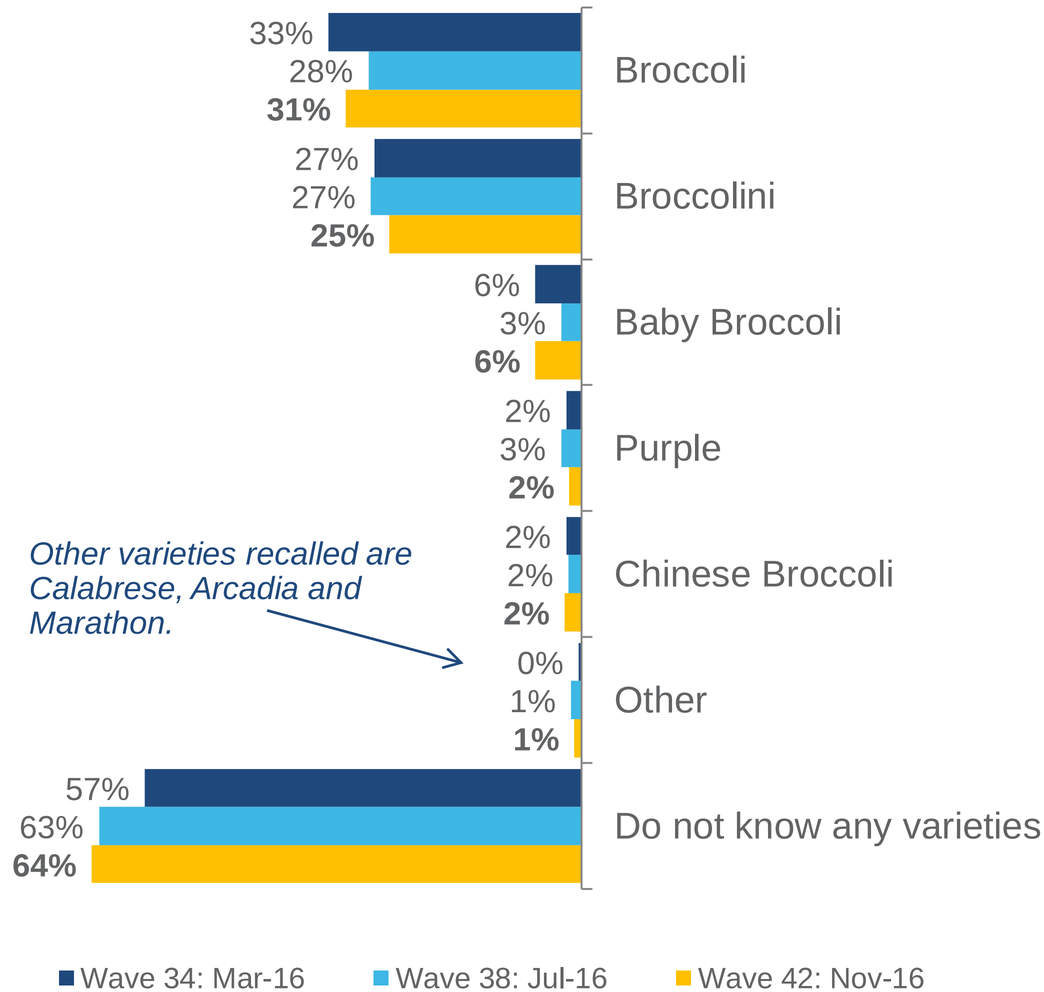


Average Price	**November 2016**		**$3.72 per kg** ▼		
	July 2016		$5.37 per kg ▲		
Highest Price	$5.00 per kg	**Lowest Price**	$2.00 per kg	**Price Range**	$3.00

Pricing was carried out on 17th November 2016 between 10am-12pm.
Prices are displayed Online / In-store. **Green text indicates promotional price.**

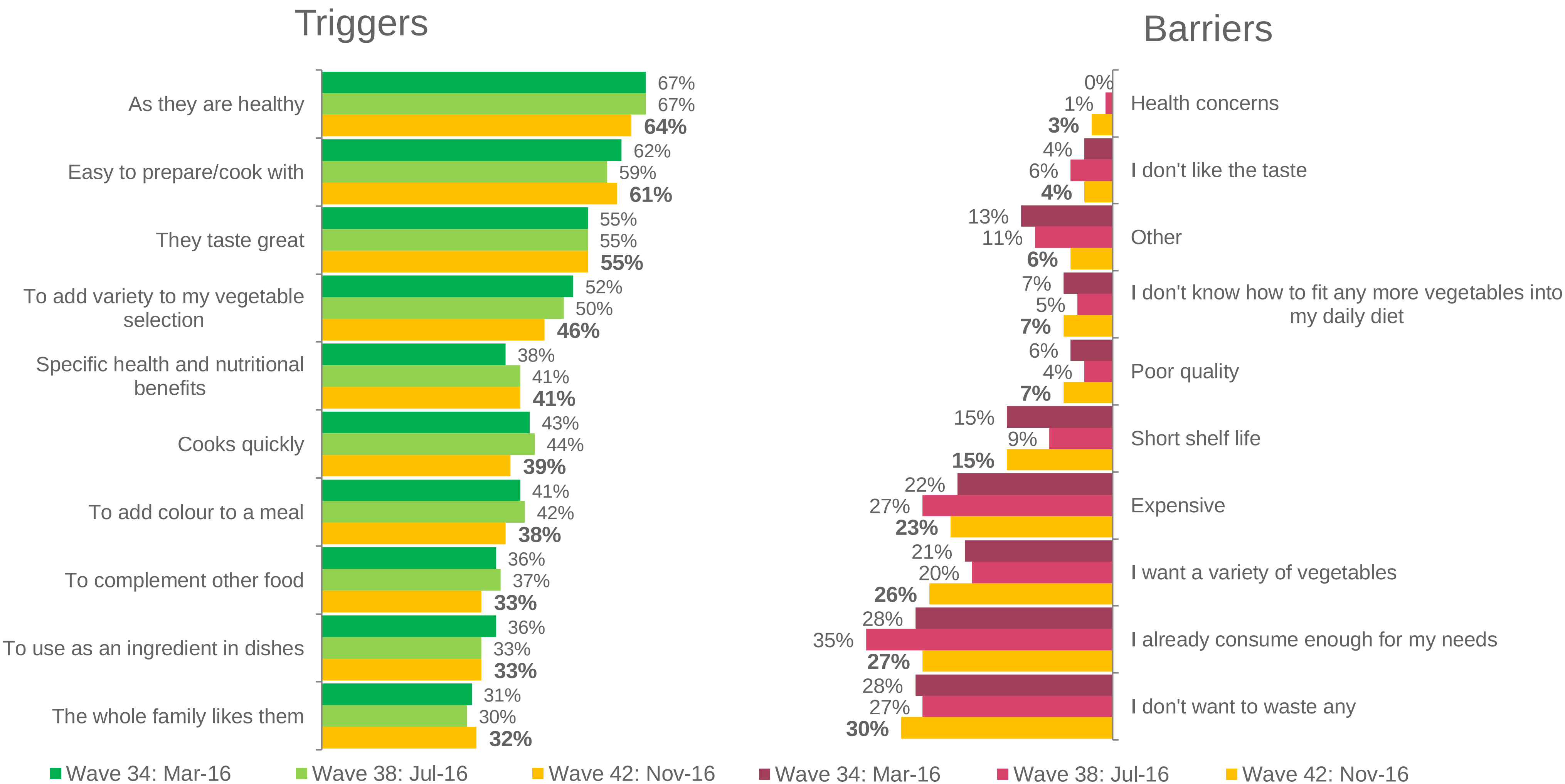
Awareness of broccoli types has declined over the last three waves.

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



Q6a. What varieties of <commodity> are you aware of? (unprompted)
Sample: Wave 34 N=303, Wave 38 N=302, Wave 42 N=315

Health and convenience continue to be the main influences on broccoli purchase. The main barriers to purchase are not wanting to waste any and already consuming enough.



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 34 N=303, Wave 38 N=302, Wave 42 N=315

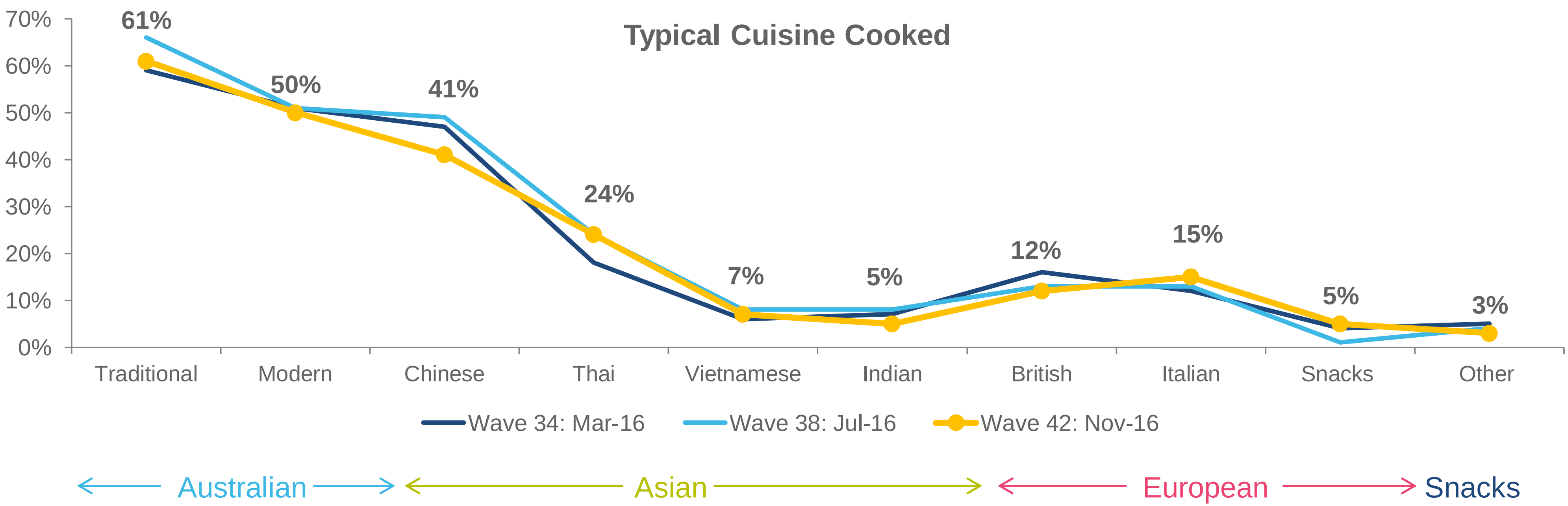
Dinner is the main meal occasion for broccoli consumption. Cuisines typically cooked remain relatively consistent this wave, with Australian and Chinese cuisines being most popular.

Top 5 Consumption Occasions

	Wave 38	Wave 42
Dinner	79%	**77%**
Family meals	60%	**59%**
Weekday meals	56%	**48%**
Weekend meals	49%	**41%**
Quick Meals	28%	**40%**

11% used broccoli when cooking a new recipe

▼ 10%, Wave 38



Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?
Sample: Wave 34 N=303, Wave 38 N=302, Wave 42 N=315

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

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

Accompanying Vegetables

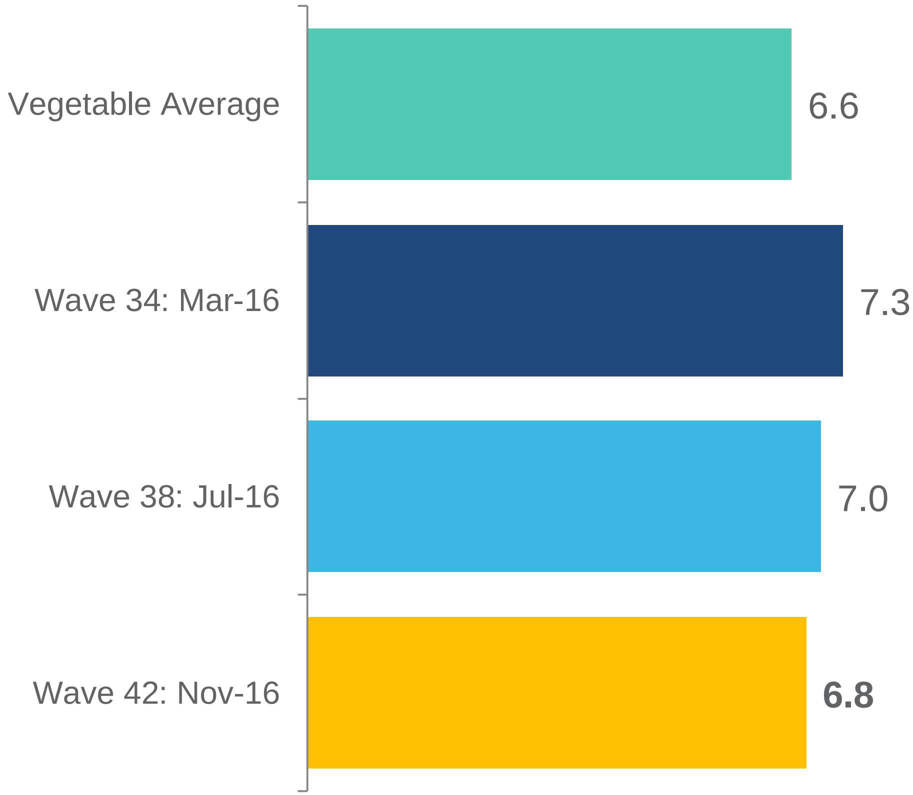
Carrot	68% ▼
Potato	61% ▼
Cauliflower	38% ▼
Pumpkin	32% ▲
Sweet Potato	30% ▼

Top 10 Cooking Styles

	Wave 34	Wave 38	Wave 42
Steaming	67%	66%	**62%**
Stir frying	47%	51%	**48%**
Boiling	35%	32%	**33%**
Microwave	25%	26%	**26%**
Sautéing	11%	11%	**11%**
Raw	9%	9%	**10%**
Soup	15%	14%	**10%**
Frying	7%	8%	**6%**
Slow Cooking	10%	6%	**6%**
Baking	6%	5%	**5%**

Q9. How do you typically cook <commodity>?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
Sample: Wave 34 N=303, Wave 38 N=302, Wave 42 N=315

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



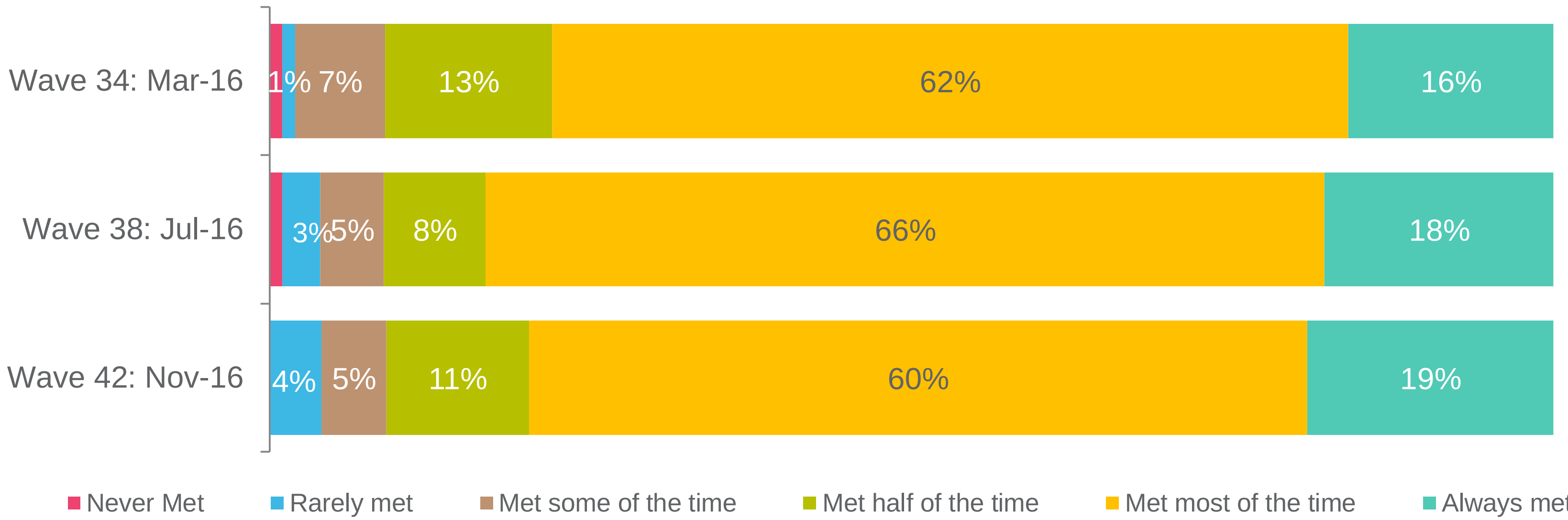
Q14. When purchasing <commodity>, how important is Provenance to you?
Q15. And when purchasing Chillies, how important is that it is grown in Australia?
Sample: Wave 34 N=303, Wave 38 N=302, Wave 42 N=315

Broccoli is expected to stay fresh for just over a week, relatively consistent with previous waves. Expectations of freshness are increasingly being met all of the time.

Expected to stay fresh for **7.8** days

▼ 7.7 days, Wave 34
▲ 8.2 days, Wave 38

Expectations Met



Q12. How long do you expect <commodity> to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy <commodity> ?
Sample: Wave 34 N=303, Wave 38 N=302, Wave 42 N=315

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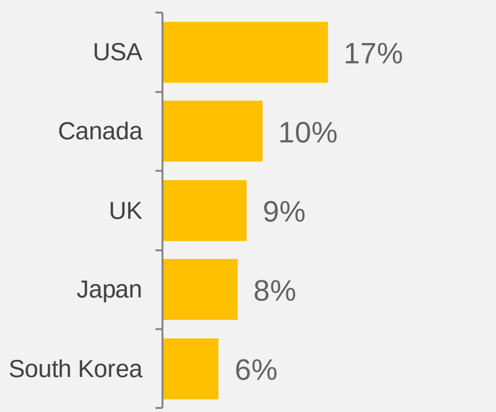
Broccoli Product Launch Trends.

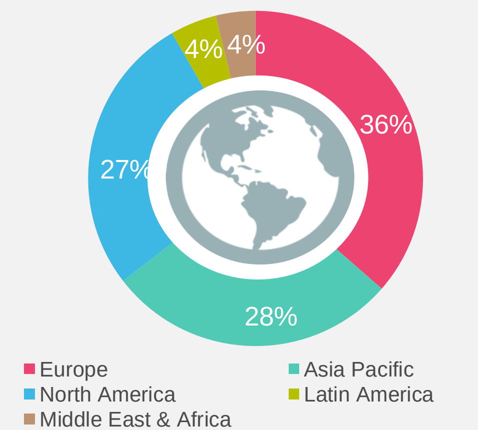
Broccoli Global Launches
August – November 2016

There were 313 new broccoli products launched globally over the last 3 months. Top categories for launch were meals and fruit & vegetables. These launches occurred primarily across Europe and Asia Pacific.

Country

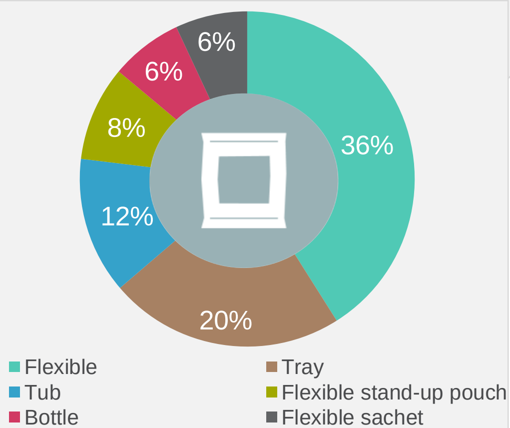


Region



313 Global NPDs

Top Pack Formats



Categories

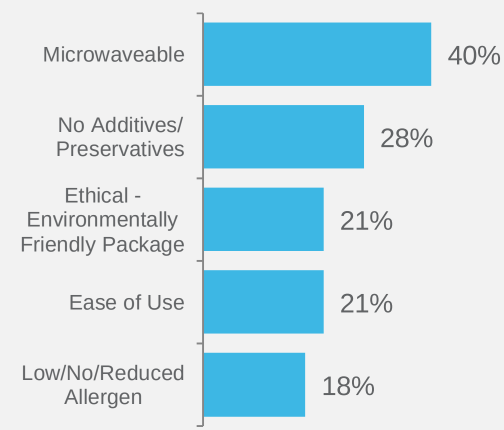
Meals 32%

Fruits & Vegetables 26%

Juice Drinks 7%

Skincare 6%

Top Claims



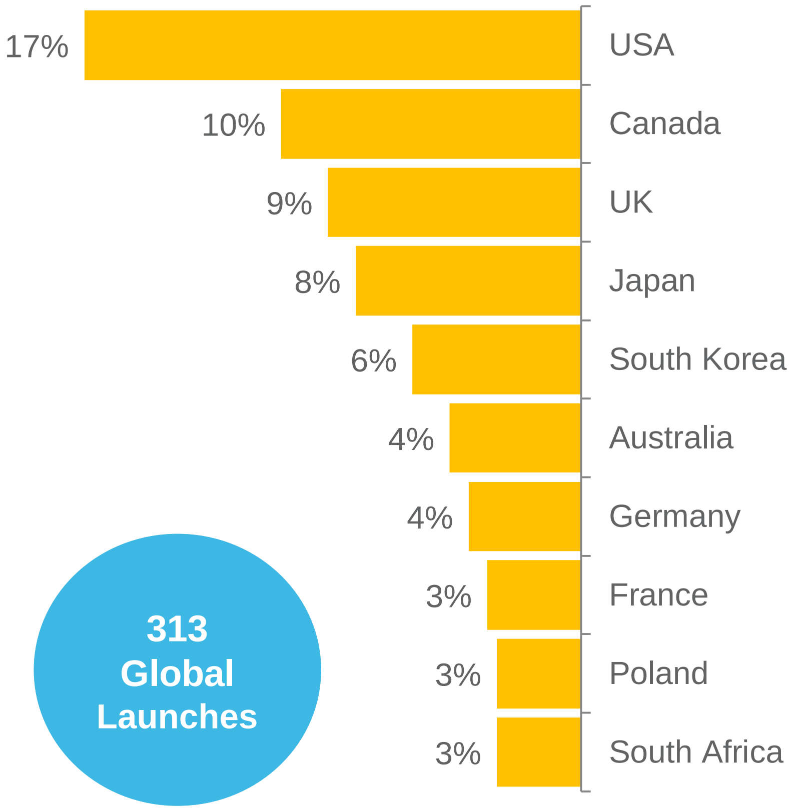
Broccoli Product Launches:
Last 3 Months (August – November 2016)
Summary

- A total of 313 products containing broccoli as an ingredient were launched globally within the last 3 months, slightly lower than the previous wave.
- There were 14 products containing broccoli launched in Australia in the past 3 months (see upcoming slide for more detail).
- Europe (36%) and Asia Pacific (28%) were the top regions for broccoli product launches.
- Flexible pack formats (36%) are the predominant form of packaging for launches in the last 3 months. This is consistent with the previous waves.
- The top categories for launches were meals (32%), fruit and vegetable products (26%), and juice drinks (7%).
- The core claims used for launches centred around convenience and health, with microwaveable being the top claim (40%), and no additives or preservatives (28%).
- The most innovative launch found was Riced Broccoli in the USA (see upcoming slides for more detail).

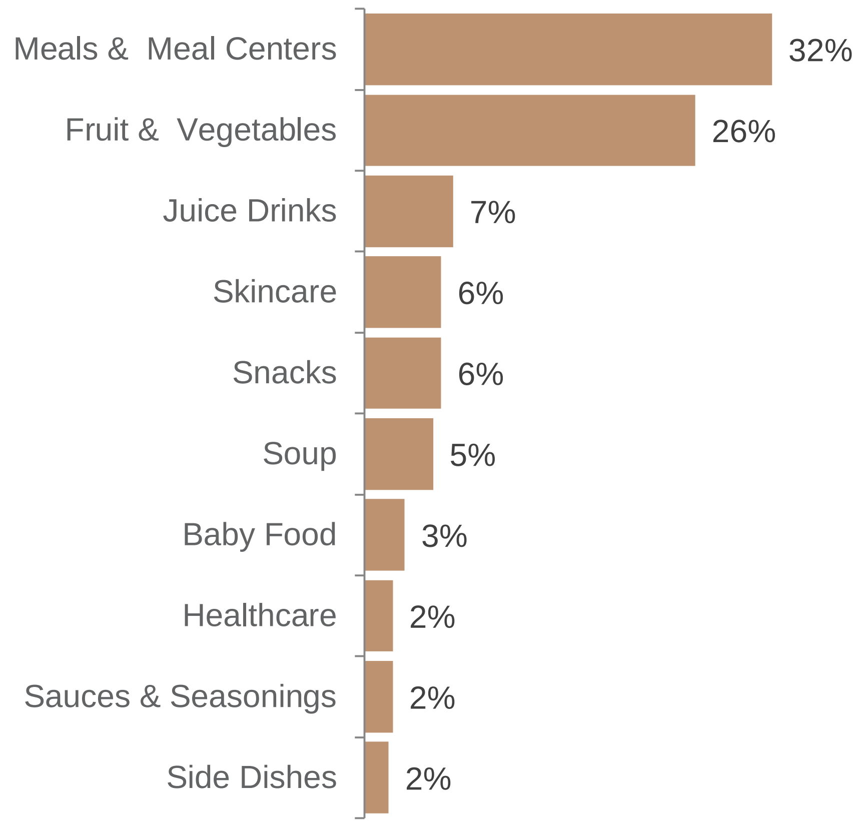
Source: Mintel (2016)

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

Top Launch Countries



Top Launch Categories



Horticulture Innovation Australia
colmar brunton.

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

Pack Formats Used

Global	Flexible	36%
Global	Tray	20%
Global	Tub	12%
Europe	Flexible	41%
Europe	Tray	20%
Europe	Tub	15%
Asia Pacific	Flexible	18%
Asia Pacific	Tray	15%
Asia Pacific	Flexible sachet	14%

Top Claims Used

Global	Microwaveable	40%
Global	No Additives/Preservatives	28%
Global	Ethical - Environmentally Friendly Package	21%
Europe	Microwaveable	45%
Europe	No Additives/Preservatives	25%
Europe	Ethical - Environmentally Friendly Package	25%
Asia Pacific	Microwaveable	28%
Asia Pacific	No Additives/Preservatives	27%
Asia Pacific	Botanical/Herbal	23%

Only shown regions > 30 products launched

Innovative Broccoli Launches:
L3M (August – November 2016)

Woolworths Food Vegetarian Pea & Broccoli Barley Risotto (South Africa)

Woolworths Food Vegetarian Pea & Broccoli Barley Risotto comprises creamy barley risotto topped with fresh green vegetables and feta. The vegetarian with milk certified product can be microwaved in two minutes and 30 seconds, and retails in a partially recyclable 350g pack with a sleeve made from 70% previously recycled paper.

Claims:

Microwaveable, Vegetarian, Ethical - Environmentally Friendly Package

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

Gestus Broccoli Bouquets (Denmark)

Gestus Broccoli Buketter (Broccoli Bouquets) are said to be perfect as a side dish to meat, poultry or fish, or as a filling in pies, in salads, or in stews. This blanched product can be heated in the microwave, can be used as a part of the recommended six fruits and vegetables per day, and retails in a 600g pack, bearing the Green Keyhole, Facebook and Instagram logos and cooking instructions.

Claims:

Microwaveable, Social Media

Greenday Broccoli Chips (France)

Greenday Broccoli Chips are now available. This 100% natural product is made from vacuum fried and real vegetables, is free of gluten, preservatives, food colouring and added sugars and is high in fibre. This premium and crunchy snack is halal certified, retails in a 35g pack. The product was on display at SIAL 2016 in Paris, France

Claims:

No Additives/Preservatives, All Natural Product, High/Added Fiber, Low/No/Reduced Sugar, Premium, Halal, Gluten-Free, Low/No/Reduced Allergen

Source: Mintel (2016)

Innovative Broccoli Launches:
L3M (August – November 2016)

Zü & Vëg Apple, Spinach and Broccoli Juice (Spain)

Zü & Vëg Zumo de Manzana, Espinaca y Brócoli (Apple, Spinach and Broccoli Juice) with a touch of ginger contains 70% juice and stevia. The product is a natural source of fibre, is free from added sugar, gluten and preservatives, and retails in a 1L pack.

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

Robert Irvine Signature Sidekicks Garlic Balsamic Broccoli (USA)

Robert Irvine Signature Sidekicks Garlic Balsamic Broccoli is now available. This restaurant style product comprises long stem broccoli, red onions, golden raisins and peanuts in a garlic balsamic sauce. It can be prepared in ten minutes or less in three easy steps, and can be paired with seared salmon fillets, roasted pork loins or grilled chicken breasts. The product retails in a 13.16-oz. pack.

Claims:
Ethical - Charity, Time/Speed, Ease of Use

Green Giant Fresh Thai Soup Blend (Canada)

Green Giant Fresh Thai Soup Blend contains fresh vegetables that are recipe ready for soups and more. The product is free from preservatives and retails in a recyclable 454g pack featuring a recipe suggestion, a QR code and the Facebook and Twitter logos.

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

Woolworths Food Easy to Cook Green Vegetables & Marrow Spaghetti (South Africa)

Woolworths Food Easy to Cook Green Vegetables & Marrow Spaghetti has been relaunched with a new packaging design and a new and improved recipe. This stir fry mix is made with broccoli, spinach and red onion, and can be cooked in a frying pan or in a wok. This product retails in a 375g recyclable pack.

Claims:
Ethical - Environmentally Friendly Package, Ease of Use

Source: Mintel (2016)

Innovative Broccoli Launches:

L3M (August – November 2016)

Trader Joe's Riced Broccoli (USA)

Trader Joe's Riced Broccoli is said to be wonderful to use in place of rice, pasta, or riced cauliflower as the base of sauces or protein. The kosher certified product contains nothing but broccoli and retails in a 15-oz. pack.

Claims:
All Natural Product, Kosher

SmartMade Spicy Peanut Chicken & Broccoli (USA)

SmartMade Spicy Peanut Chicken & Broccoli comprises real grilled white meat chicken with broccoli, carrots and caramelized onions over brown rice lightly tossed in a spicy peanut sauce. This USDA inspected microwaveable product is an excellent source of protein, contains no artificial flavors or colors and retails in a 9-oz. pack.

Claims:
No Additives/Preservatives, Microwaveable

Tastefully Plated Paleo Braised Beef (USA)

Tastefully Plated Paleo Braised Beef is made with mole sauce, chipotle sweet potatoes and broccoli. The USDA inspected product is free from grain, gluten and milk, contains 18g of protein, can be heated in the microwave and retails in a 10.6-oz. BPA free pack.

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

Saf Raw Spinach & Broccoli Activated Crackers (UK)

Saf Raw Spinach & Broccoli Activated Crackers are new to the range. The product is suitable for raw vegan diet; and is free from gluten, dairy and soy. The crackers are high in fibre, are a source of protein, and are made at 46°C. They retail in a 44g pack, and were on display at the Speciality & Fine Food Fair 2016 in Olympia, London.

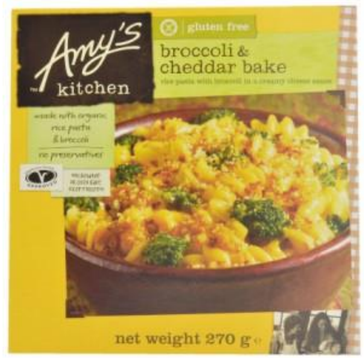
Claims:
High/Added Fiber, Gluten-Free, Low/No/Reduced Allergen, Vegan, No Animal Ingredients

Source: Mintel (2016)

Australian Broccoli Launches:
L3M (August – November 2016)

Greco's Ultrablast Cacao Superfood Breakfast

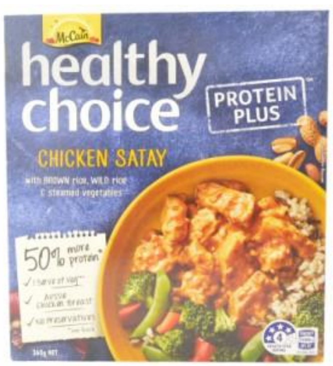
Amy's Kitchen Broccoli & Cheddar Bake



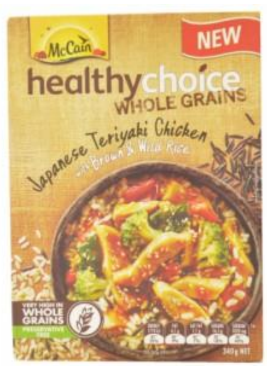
Sephora Pearl Face Mask

Lean Cuisine Pots of Goodness Thai Green Chicken Curry

McCain Healthy Choice Protein Plus Chicken Satay



McCain Healthy Choice Wholegrains Japanese Teriyaki Chicken with Brown & Wild Rice



Coles Carrot & Broccoli Florets

Birds Eye Steam Fresh Baby Potatoes with Broccoli, Carrots, Peas & Herbs

Source: Mintel (2016)

Chillies.

Consumption frequency has continued to increase across waves, with consumers purchasing chillies approximately once a week.

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

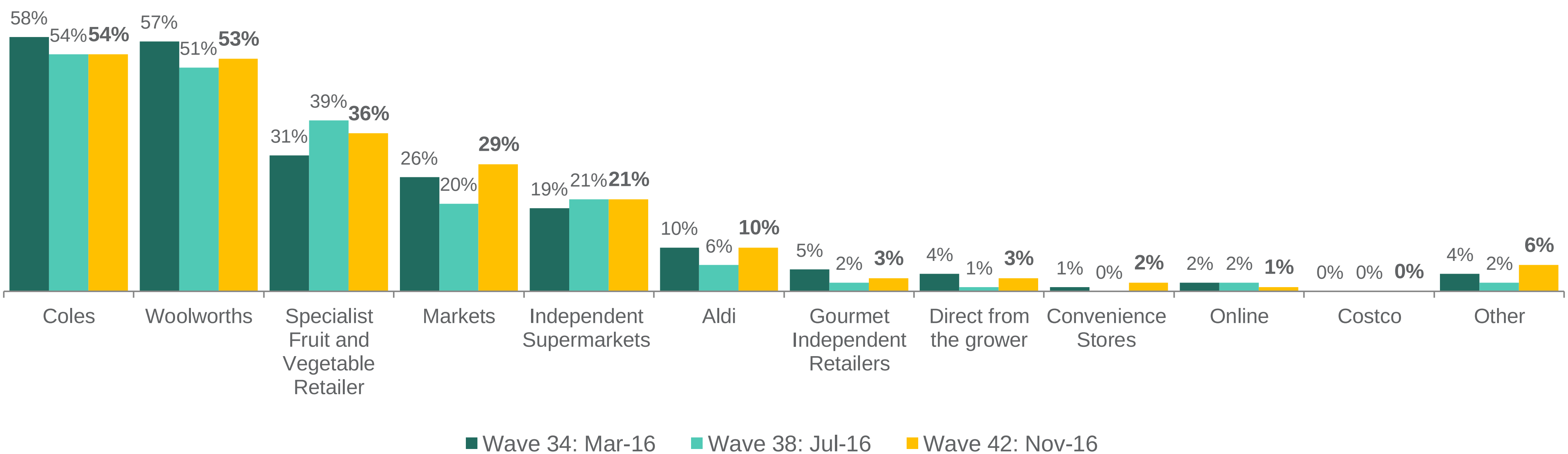
Average Purchase **3.7** times per month

- 3.7 times, Wave 34
- 3.2 times, Wave 38

Average Consumption **12.4** times per month

- 11.1 times, Wave 34
- 12.0 times, Wave 38

Purchase Channels



Q1. On average, how often do you purchase <commodity>?
Q2. On average, how often do you consume <commodity>?
Q5. From which of the following channels do you typically purchase <commodity>?
Sample Wave 34 N=202, Wave 38 N=203, Wave 42 N=201

Average Spend and Price Sensitivity.

Average weight of purchase

The typical consumer purchases **400g** of chillies, higher than the previous waves.

▼ 300g, Wave 34
▼ 300g, Wave 38

Recalled last spend

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

▲ $3.90, Wave 34
— $3.80, Wave 38

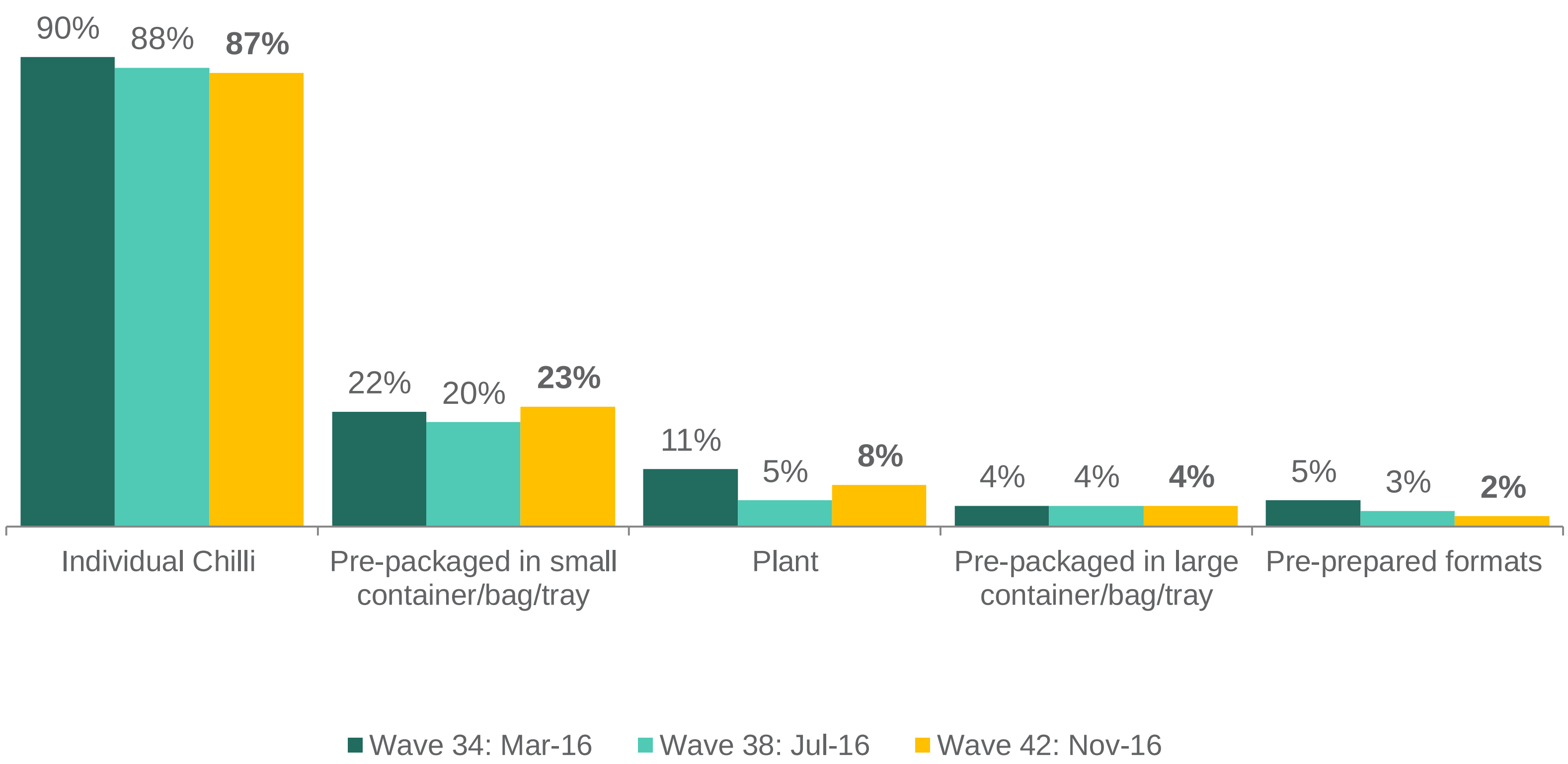
Value for money

Consumers' perceived value for money was relatively good **(6.7/10)**, which has trended upwards over the last three waves.

▼ 6.1/10, Wave 34
▼ 6.3/10, Wave 38

Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? *0-10 scale*
Sample Wave 34 N=202, Wave 38 N=203, Wave 42 N=201

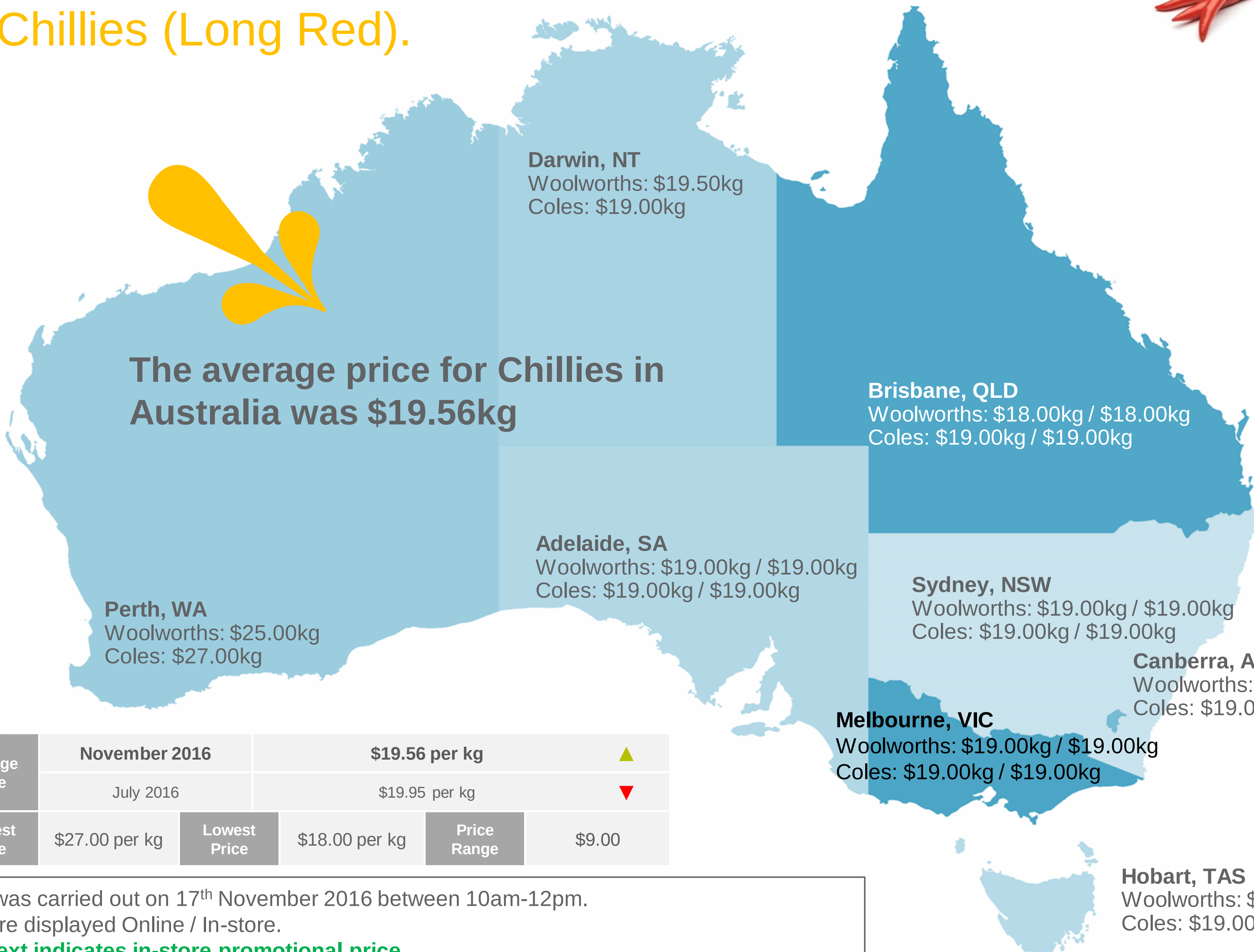
Individual chillies are the main format purchased, followed by pre-packaged small trays.



Q4b In what fresh formats do you typically purchase Chillies?
Sample Wave 34 N=202, Wave 38 N=203, Wave 42 N=201

Online and In-store Commodity Prices.

Chillies (Long Red).

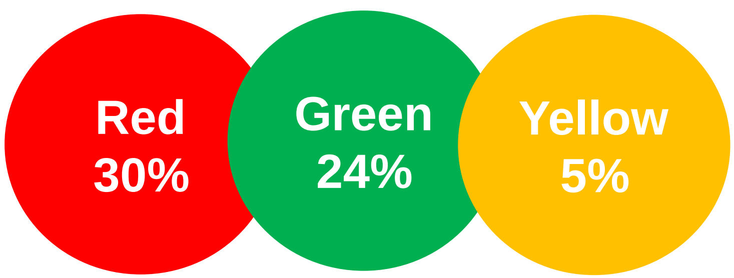


Average Price	**November 2016**	**$19.56 per kg** ▲			
	July 2016	$19.95 per kg ▼			
Highest Price	$27.00 per kg	**Lowest Price**	$18.00 per kg	**Price Range**	$9.00

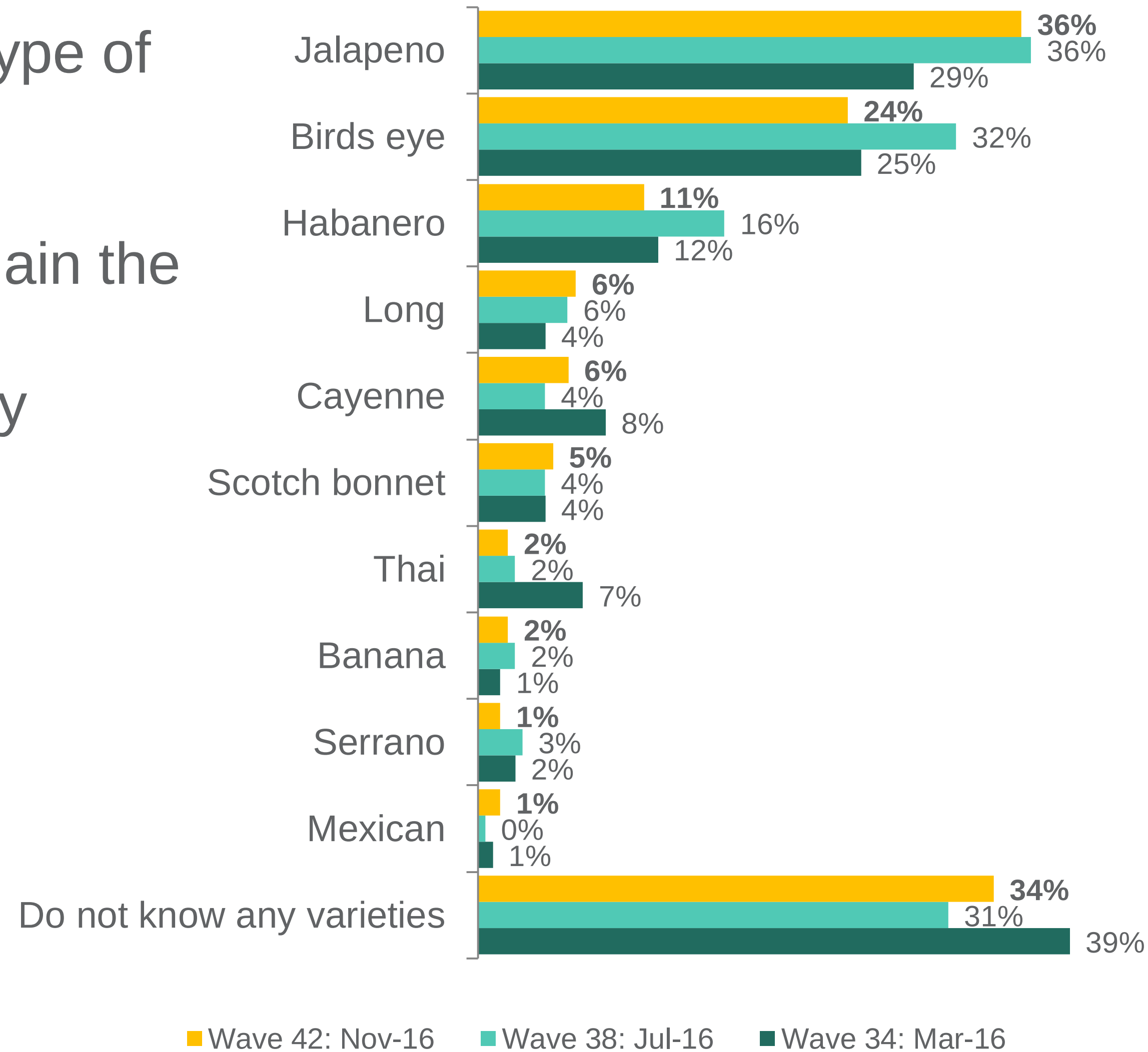
Pricing was carried out on 17th November 2016 between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates in-store promotional price.

Approximately one third of consumers cannot recall a type of chilli.

Jalapeno and Birds eye remain the most recalled types, with consumers also prompted by colour.



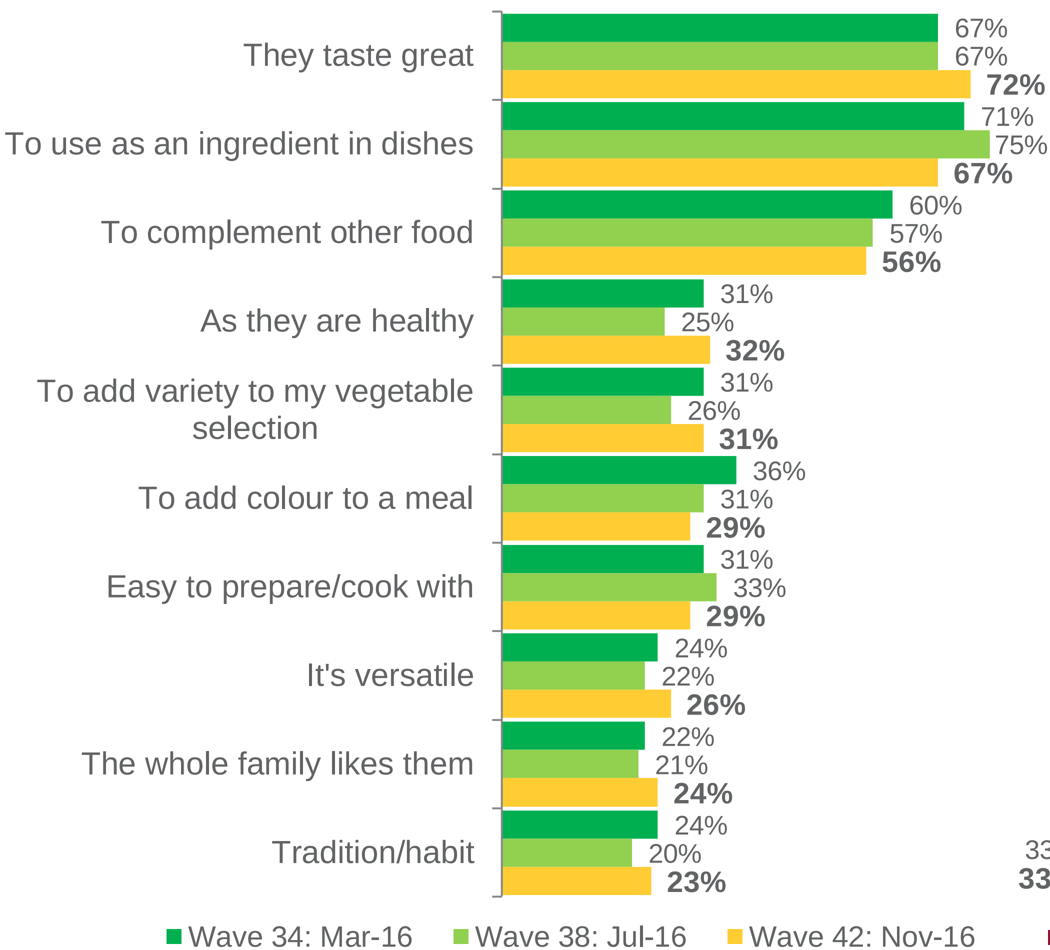
Chilli colour recall



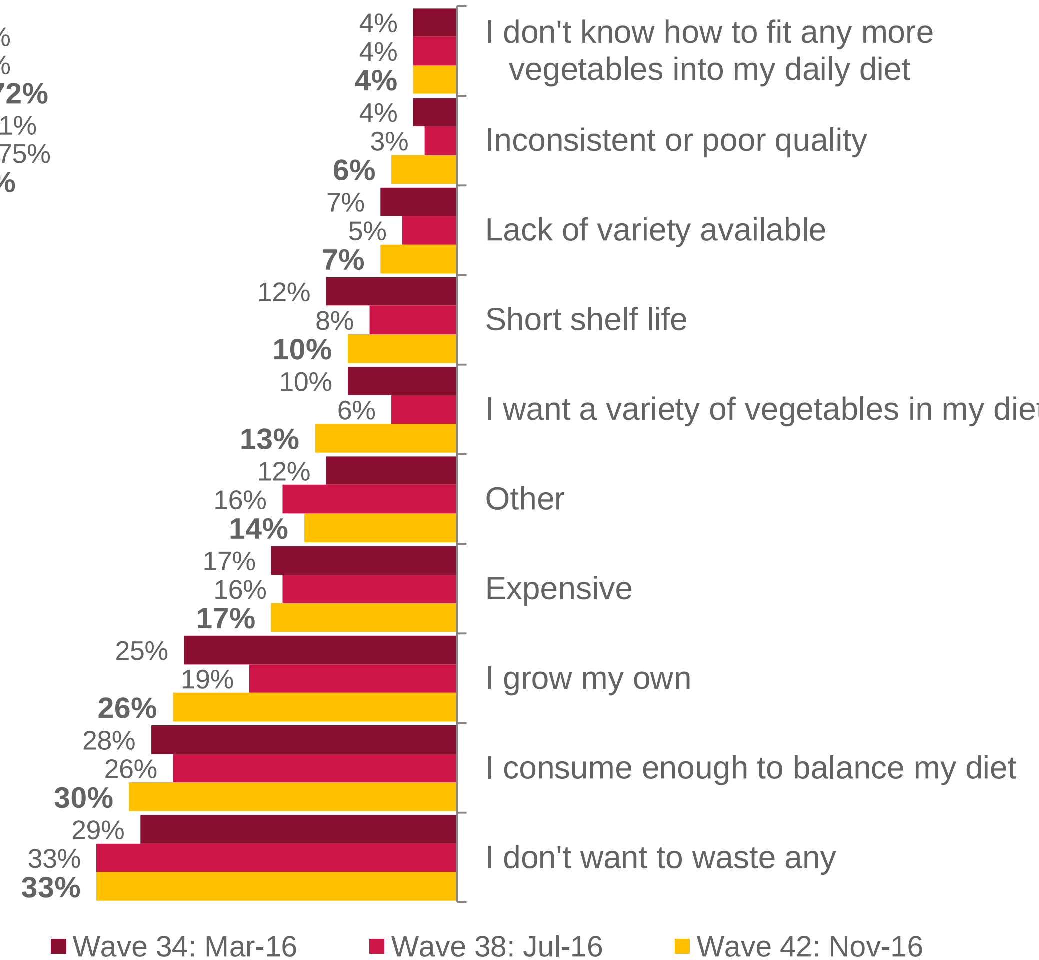
Q6a. What types/varieties of <commodity> are you aware of? (unprompted)
Sample Wave 34 N=202, Wave 38 N=203, Wave 42 N=201

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

Triggers



Barriers



Q7. Which of the following reasons best describes why you purchase <commodity> ?
Q8. Which reason best describes why you don't buy <commodity> more often?
Sample Wave 34 N=202, Wave 38 N=203, Wave 42 N=201

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Chillies are popular in Asian and Indian cuisine. There has been an increase in use of chillies in Italian cuisines over the last three waves.

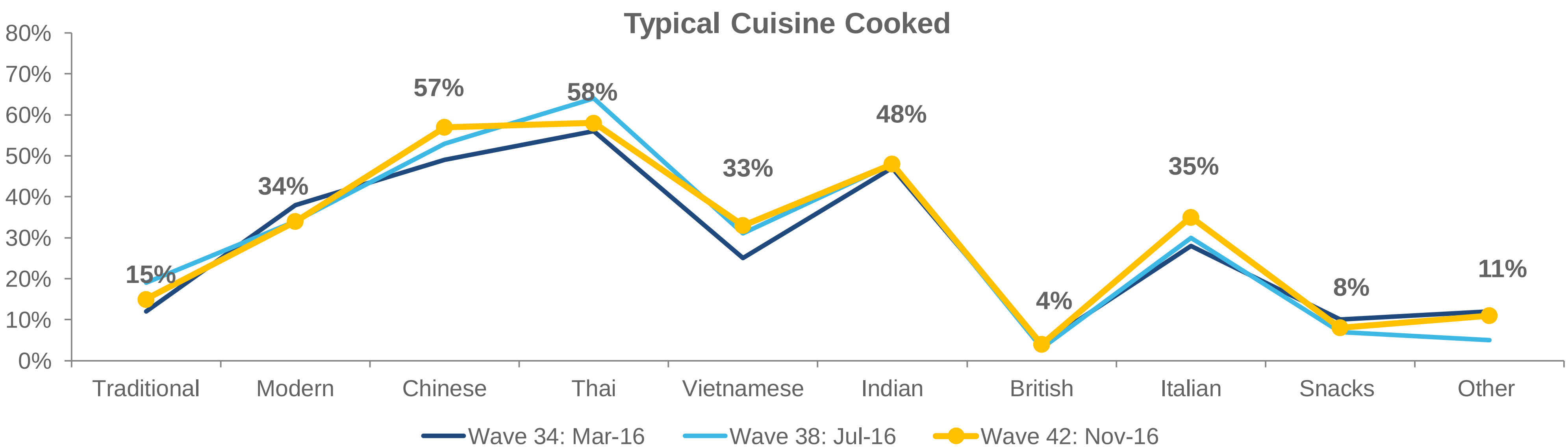
Consumers are typically eating chillies for dinner and are also popular when cooking new recipes.

Top 5 Consumption Occasions

	Wave 38	Wave 42
Dinner	75%	77%
Family meals	65%	65%
Weekday meals	54%	52%
Weekend meals	56%	52%
Quick Meals	42%	47%

33% used chillies when cooking a new recipe

▼ 30%, Wave 38



Australian — Asian — European — Snacks

Q10. What cuisines do you cook/consume that use <commodity> ?
Q11. Which of the following occasions do you typically consume/use <commodity> ?
Sample Wave 34 N=202, Wave 38 N=203, Wave 42 N=201

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

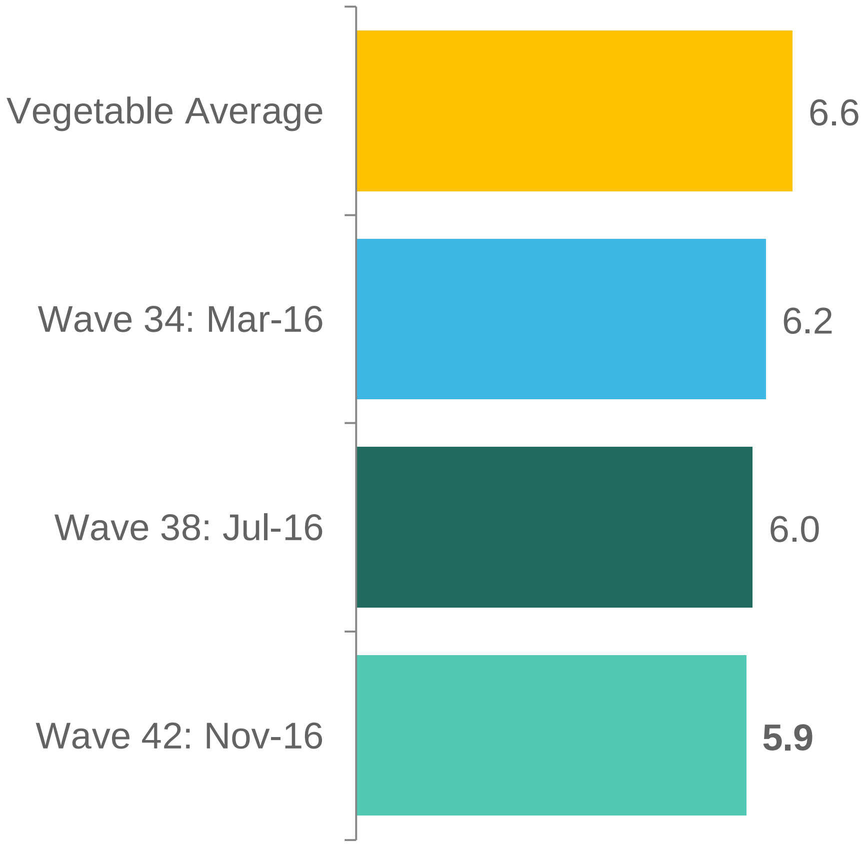
Accompanying Vegetables

Onion	65%
Tomato	57%
Capsicum	56%
Garlic	54%
Carrot	43%

Top 10 Cooking Styles			
	Wave 34	Wave 38	**Wave 42**
Stir frying	78%	76%	**78%**
Frying	40%	36%	**44%**
Raw	32%	30%	**39%**
Slow Cooking	29%	30%	**34%**
Sautéing	30%	26%	**31%**
Soup	22%	24%	**30%**
Roasting	25%	17%	**19%**
Grilling	17%	11%	**17%**
Steaming	9%	5%	**10%**
Baking	8%	11%	**10%**

Q9. How do you typically cook <commodity> ?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
Sample Wave 34 N=202, Wave 38 N=203, Wave 42 N=201

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



7.0 ▲

Wave 38: **6.9**

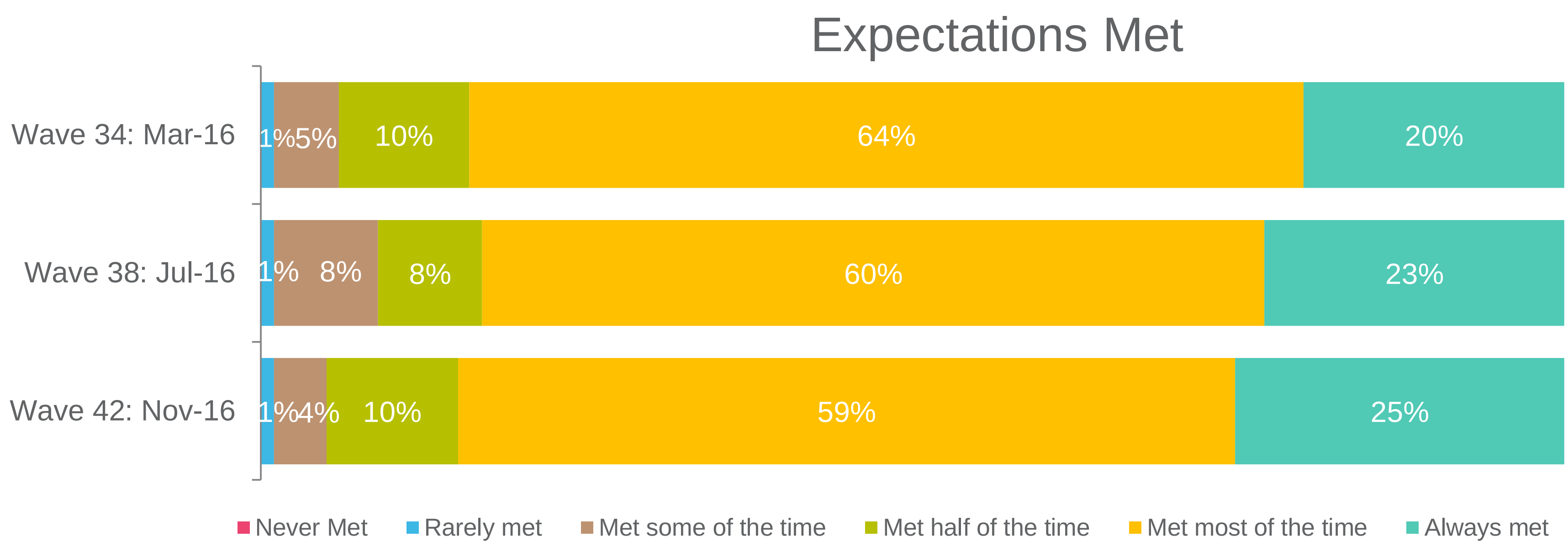
Q14. When purchasing <commodity>, how important is Provenance to you?
Q15. And when purchasing Chillies, how important is that it is grown in Australia?
Sample Wave 34 N=202, Wave 38 N=203, Wave 42 N=201

Although the expected shelf life of chillies declined this wave, freshness expectations continued to improve with one quarter of consumers stating that their expectations were always met.

Expected to stay fresh for **11.1** days

11.2 days, Wave 34

11.8 days, Wave 38



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 34 N=202, Wave 38 N=203, Wave 42 N=201

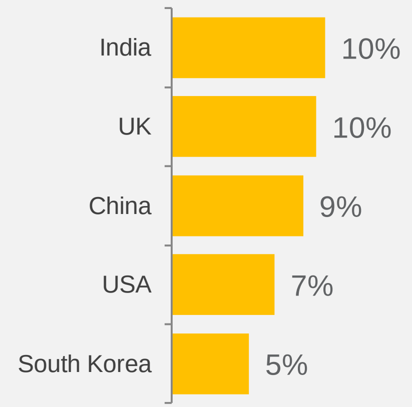
Chillies Product Launch Trends.

Chilli Global Launches

August – November 2016

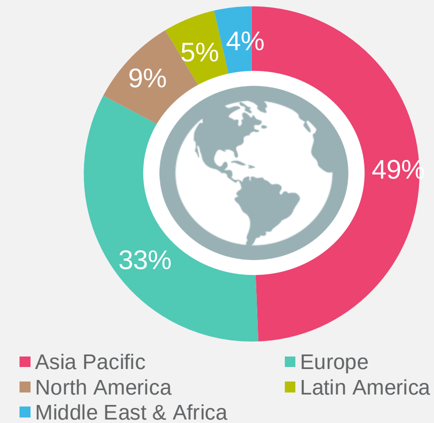
There were 2919 new products launched in the last 3 months that contained chilli as an ingredient. The majority of these launches were in the Asia Pacific and Europe. The top product launches categories were sauces & seasonings and snacks.

Country

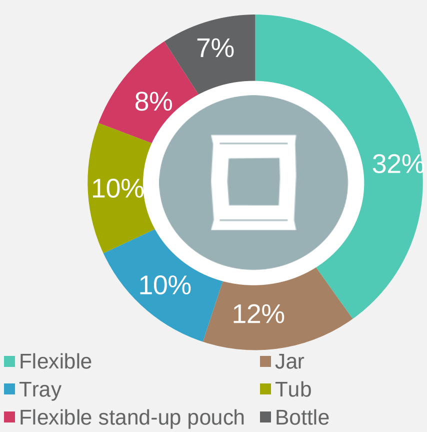


2919 Global NPDs

Region



Top Pack Formats



Categories

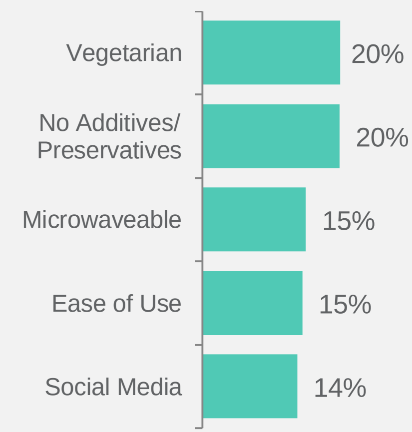
Sauces & Seasoning 32%

Snacks 23%

Meals 21%

Processed Products 12%

Top Claims



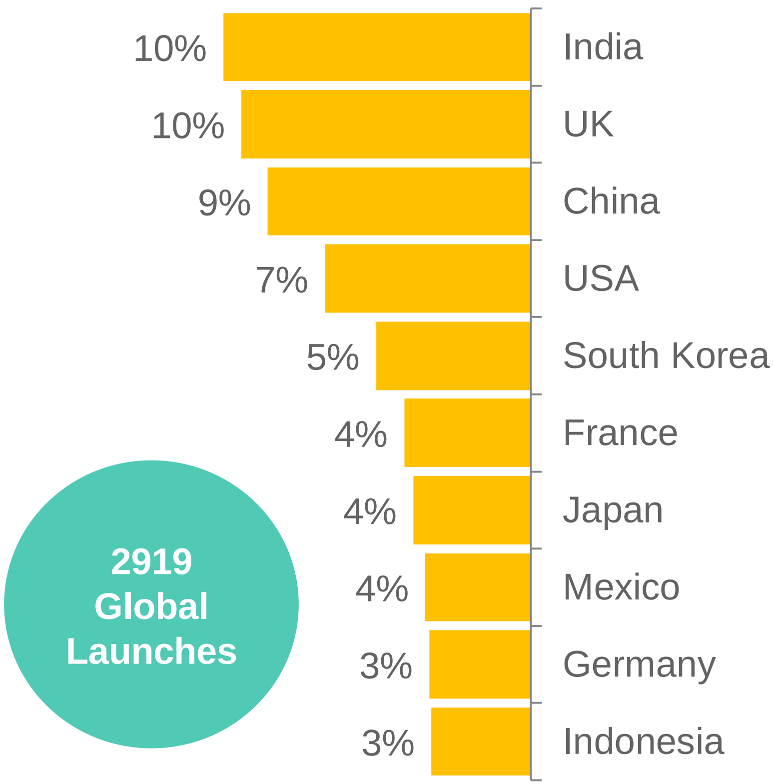
Chilli Product Launches:
Last 3 Months (August – November 2016)
Summary

- A total of 2919 products that contained chilli as an ingredient have been launched globally in the last 3 months.
- There were 57 chilli products launched in Australia – slightly lower than the previous wave.
- The two main regions for launches are Asia Pacific (49%) and Europe (33%).
- Flexible packaging (32%) and jars (12%) remained the main formats used for chilli launches.
- Top categories for launches are sauces and seasoning (32%) and snacks (23%).
- The key claims used are vegetarian (20%) and no additives/preservatives (20%).
- The most innovative product is Pumpkin-Chilli Ketchup from the Czech Republic (see upcoming slides for more details).

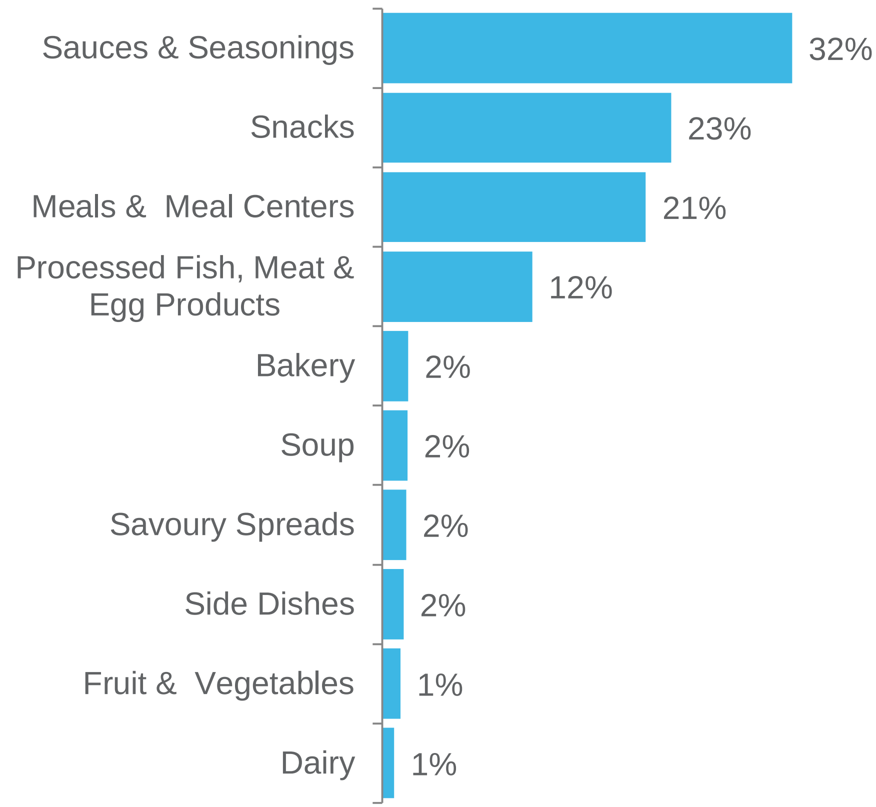
Source: Mintel (2016)

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

Top Launch Countries



Top Launch Categories



Horticulture Innovation Australia

colmar brunton.

Vegetarian is the key claim used globally on products containing chilli. Flexible formats are the main type of packaging used, consistent with past waves.

Pack Formats Used

Global	Flexible	32%
	Jar	12%
	Tray	10%
Asia Pacific	Flexible	41%
	Flexible stand-up pouch	10%
	Flexible sachet	10%
Europe	Tray	20%
	Flexible	19%
	Jar	17%

Top Claims Used

Global	Vegetarian	20%
	No Additives/Preservatives	20%
	Microwaveable	15%
Asia Pacific	Vegetarian	26%
	Halal	19%
	No Additives/Preservatives	18%
Europe	No Additives/Preservatives	24%
	Ethical - Environmentally Friendly Package	19%
	Microwaveable	18%

Only shown regions > 30 products launched

Innovative Chilli Launches:
L3M (August – November 2016)

Olde Thompson Sweet & Smoky BBQ Grinder (USA)

Olde Thompson Sweet & Smoky BBQ Grinder is a robust blend of spices with a sweet and smoky hint to make the mouth watering. It can be used on steaks, chicken and ribs for a great BBQ flavor. This kosher certified product retails in a 6.5-oz. pack.

Claims:
Kosher

Green Grocer's Mexican Stir-Fry (Spain)

Green Grocer's Salteado Mexicano (Mexican Stir-Fry) is a blend of vegetables and red kidney beans in a seasoned sauce. It can be microwaved and retails in a 750g pack.

Claims:
Microwaveable

Ridderheims Original Tapas Plate (Norway)

Ridderheims Originalbricka (Original Tapas Plate) comprises marinated garlic cloves, black garlic Kalamata olives, Italian artichoke marinated with parmesan and capris, green garlic olives, creamy herb marinated feta cheese, and pomamore sweet tomatoes with basil and parmesan. This classic product retails in a 325g pack.

Claims:
N/A

Morrisons The Best Mexican-Spiced Chipotle Chilli Coleslaw (UK)

Morrisons The Best Mexican-Spiced Chipotle Chilli Coleslaw is described as extra crunchy indulgent coleslaw infused with smoky chipotle, garlic and a hint of ginger. This premium product is suitable for vegetarians and retails in a 270g pack.

Claims:
Vegetarian, Premium

Source: Mintel (2016)

Innovative Chilli Launches:
L3M (August – November 2016)

Orti di Calabria Vodka, Tomato & Italian Cheese Pasta Sauce (USA)

Orti di Calabria Vodka, Tomato & Italian Cheese Pasta Sauce is said to be all natural with minimally processed, and is free from artificial ingredients. It retails in a 24.3-oz. pack featuring serving suggestions.

Claims:
All Natural Product

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

Beanitos Honey Chipotle BBQ Flavoured Black Bean Chips (Indonesia)

Beanitos Makanan Ringan Kacang Hitam Rasa Barbecue (Honey Chipotle BBQ Flavoured Black Bean Chips) have been relaunched with a better taste and a new look. They have nothing artificial and are certified free from gluten by GFCO. These chips are also free from trans fat, GMO and artificial ingredients.

Claims:
No Additives/Preservatives, All Natural Product, High/Added Fiber, Kosher, Vegetarian, Low/No/Reduced Glycemic, Gluten-Free, Low/No/Reduced Transfat, Antioxidant, Low/No/Reduced Allergen, GMO-Free, Social Media

Pepe's El Original Hot & Sweet Popcorn (USA)

Pepe's El Original Hot & Sweet Popcorn is a sweet, savory and spicy combination. Described as sweet caramel corn laced with chile de arbol, it contains 0g trans fat per serving, and 11g wholegrain per serving. It retails in a 2.25-oz. pack.

Claims:
Low/No/Reduced Transfat, Wholegrain

Innovative Chilli Launches:
L3M (August – November 2016)

AH Surinamese Free Range Egg Salad (Netherlands)

AH Surinaams Vrije Uitloop Ei Salade (Surinamese Free Range Egg Salad) is now available. This gluten- and milk-free product contains no artificial fragrance or flavours, and retails in a 175g pack featuring the Beter Leven Dierenbescherming (Better Living Animal Protection) logo and containing six servings.

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

Kumar's Vietnamese Wok Paste (Netherlands)

Kumar's Wokpasta Vietnamees (Vietnamese Wok Paste) is now available. The product contains fish sauce and lemongrass, and is free from synthetic fragrances, colours and flavours. It can be served with chicken and white rice, and it retails in a 70ml pack containing 2 x 35ml units, featuring the Facebook and Twitter logos and a recipe idea.

Claims:
No Additives/Preservatives, Social Media

The Cooksister Bacon Jam (South Africa)

The Cooksister Bacon Jam can be used on literally anything, such as toast, eggs, pancakes, sandwiches, crackers, bread, potatoes, burgers and waffles. The product retails in a 300g jar.

Claims:
N/A

Hesco Coco Jazz Spicy Flavoured Crunchy Coconut Chips (France)

Hesco Coco Jazz Spicy Flavoured Crunchy Coconut Chips are made with 100% natural ingredients sourced from Thailand's world renowned coconut plantation. The chips have been baked and roasted with amber roasting technology, which slowly heats the coconut meat, baked and roasted with proprietary equipments that preserves the taste, aroma, and texture of the high quality coconuts.

Claims:
No Additives/Preservatives, All Natural Product, Low/No/Reduced Cholesterol, High/Added Fiber, Halal, Gluten-Free, Low/No/Reduced Allergen, Vegan, No Animal Ingredients, GMO-Free, Social Media

Source: Mintel (2016)

Australian Chilli Launches:
L3M (August – November 2016)

Pringles Jalapeno Flavour

Liliana's Calabrese Spice Rub

MonJay Mezza Peri Peri Dip

John West Skin-on Tasmanian Atlantic Salmon with a Sweet Soy, Ginger & Chilli Sauce

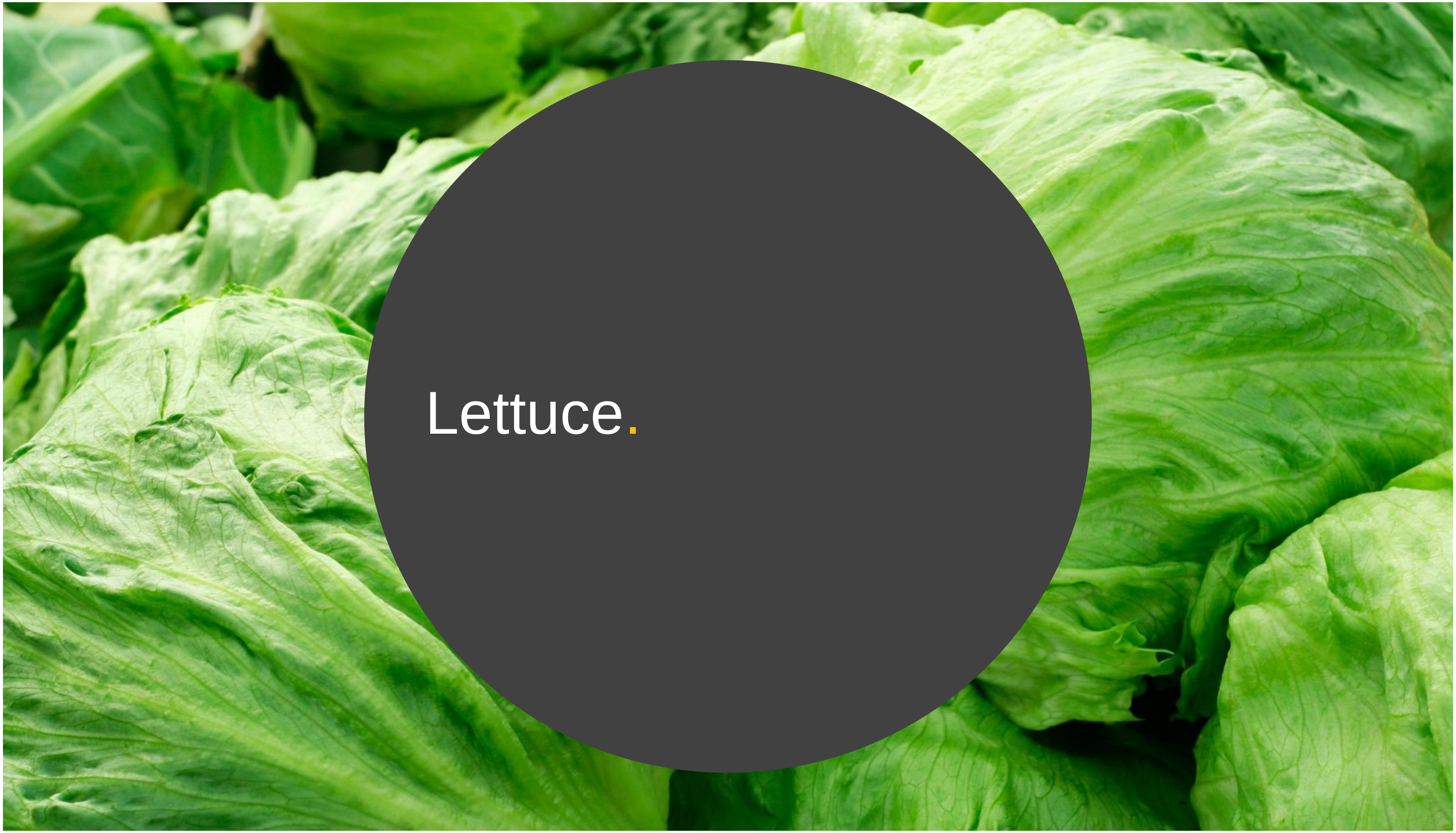
Five Tastes Thai Stir Fry Shots with Basil & Chilli

Desert Pepper Trading Company XXX Habanero Salsa

Healthy Way Chilli & Lime Flavoured Snack Mix with Cashews

Doritos Burn Corn Chips

Source: Mintel (2016)



Lettuce.

Purchase and consumption of lettuce have both increased this wave, which is likely associated with the onset of the warmer months.

Mainstream retailers remain the primary channel of purchase for consumers, with increased purchase from Aldi over the last three waves.

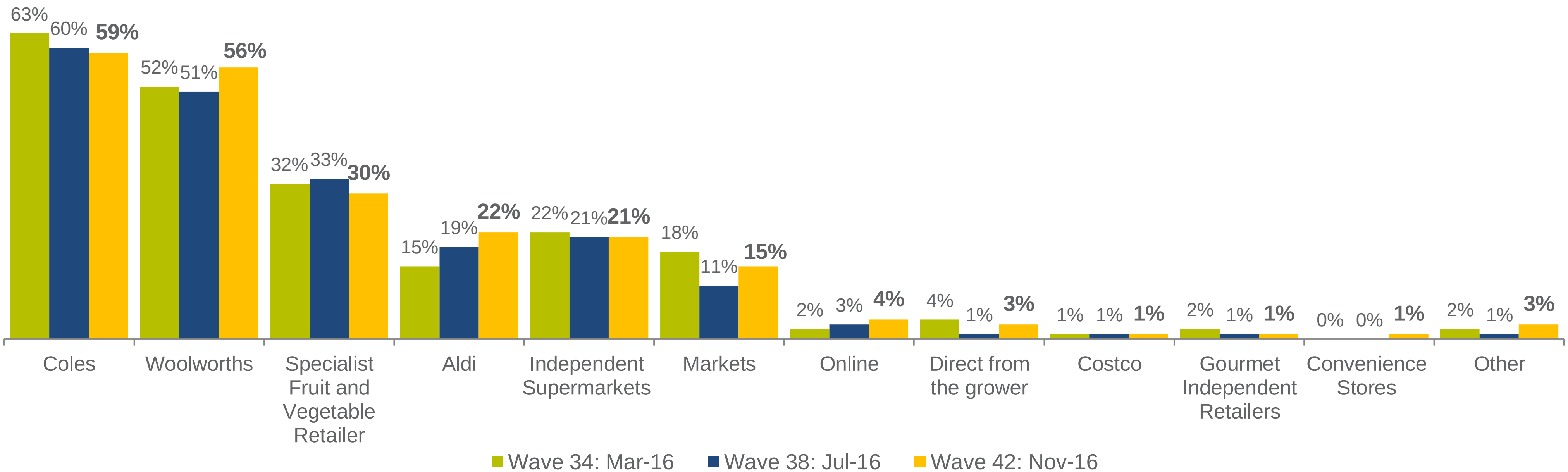
Average Purchase **4.4** times per month

- ▼ 4.1 times, Wave 34
- ▼ 3.7 times, Wave 38

Average Consumption **14.7** times per month

- ▼ 13.9 times, Wave 34
- ▼ 12.3 times, Wave 38

Purchase Channel



Q1. On average, how often do you purchase <commodity> ?
Q2. On average, how often do you consume <commodity>?
Q5. From which of the following channels do you typically purchase <commodity> ?
Sample Wave 34 N=304, Wave 38 N=302, Wave 42 N=313

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 **700g** of lettuce, which is relatively consistent with past waves.

— 700g, Wave 34
▼ 600g, Wave 38

Recalled last spend

Recalled spend on lettuce was **$2.90**, which is consistent with the previous wave.

▼ $2.70, Wave 34
— $2.90, Wave 38

Value for money

Consumers' perceived value for money is relatively good **(6.5/10)**, which is slightly higher than the previous wave.

▲ 6.6/10, Wave 34
▼ 6.3/10, Wave 38

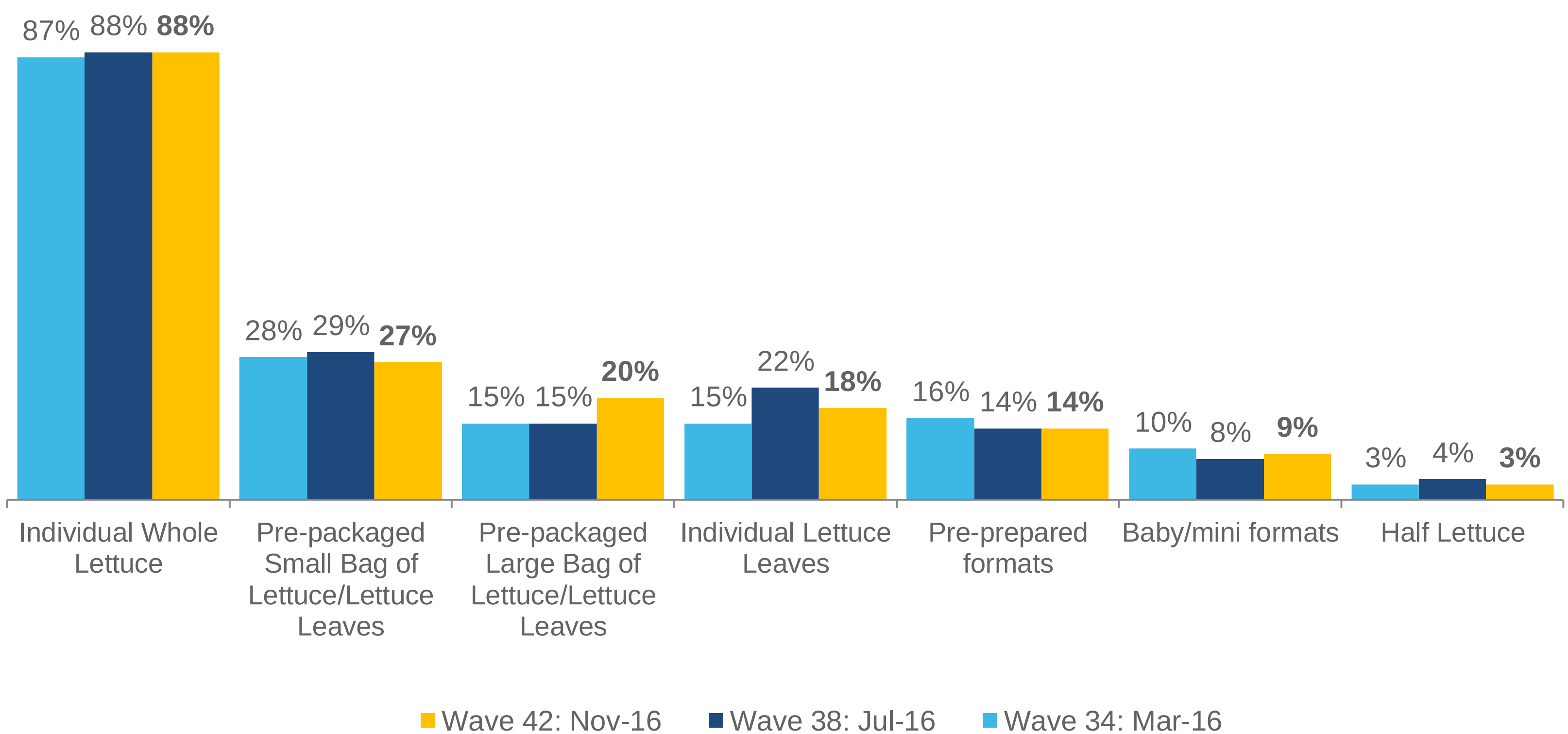
Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? 0-10 scale
Sample Wave 34 N=304, Wave 38 N=302, Wave 42 N=313

Horticulture Innovation Australia

colmar brunton.

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

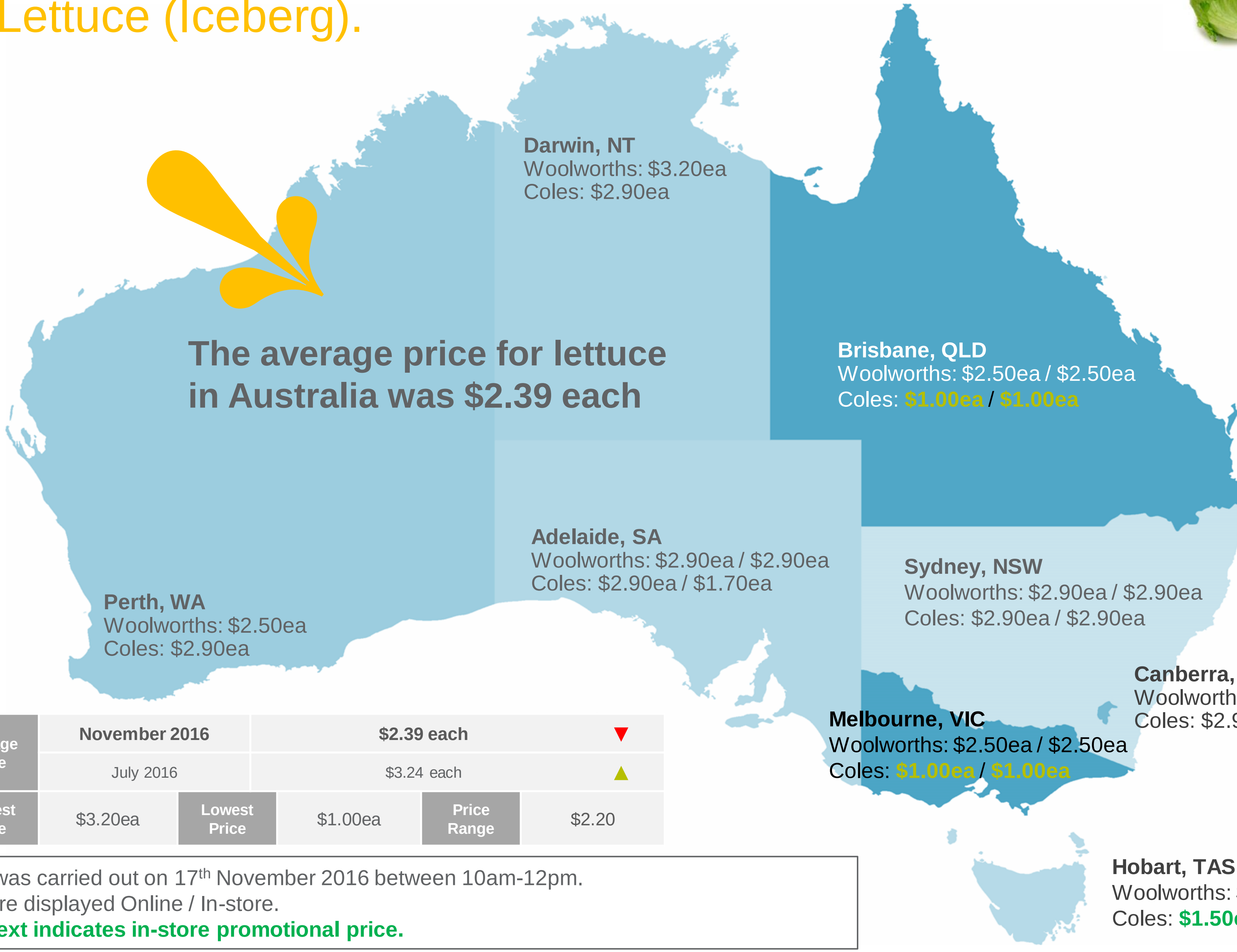
Individual lettuce heads are purchased by the majority of consumers. Over one fifth of consumers are purchasing lettuce in pre-packaged bags.



Q4b In what fresh formats do you typically purchase Lettuce?
Sample Wave 34 N=304, Wave 38 N=302, Wave 42 N=313

Online and In-store Commodity Prices.

Lettuce (Iceberg).

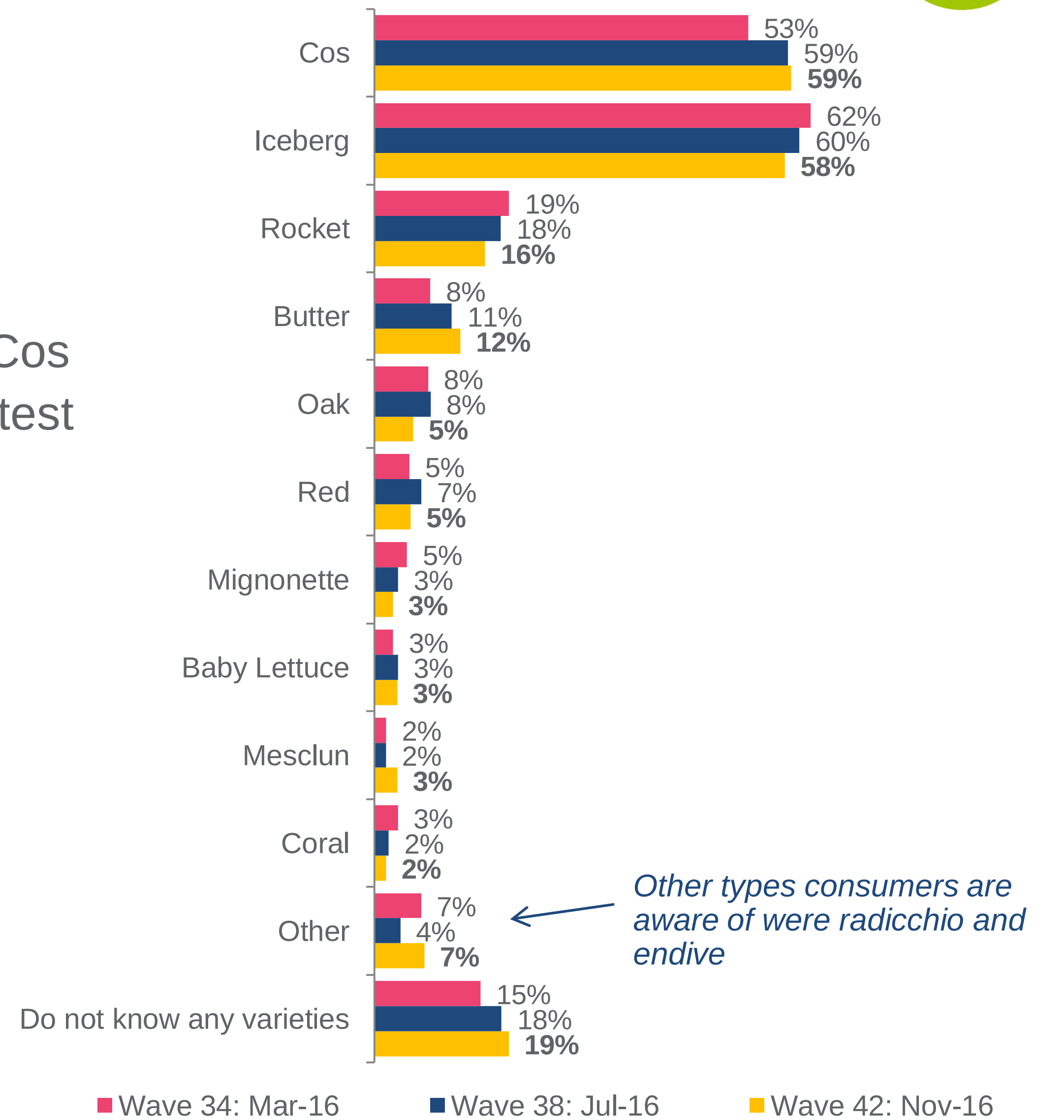


Average Price	**November 2016**	**$2.39 each**	▼		
	July 2016	$3.24 each	▲		
Highest Price	$3.20ea	**Lowest Price**	$1.00ea	**Price Range**	$2.20

Pricing was carried out on 17th November 2016 between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates in-store promotional price.

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

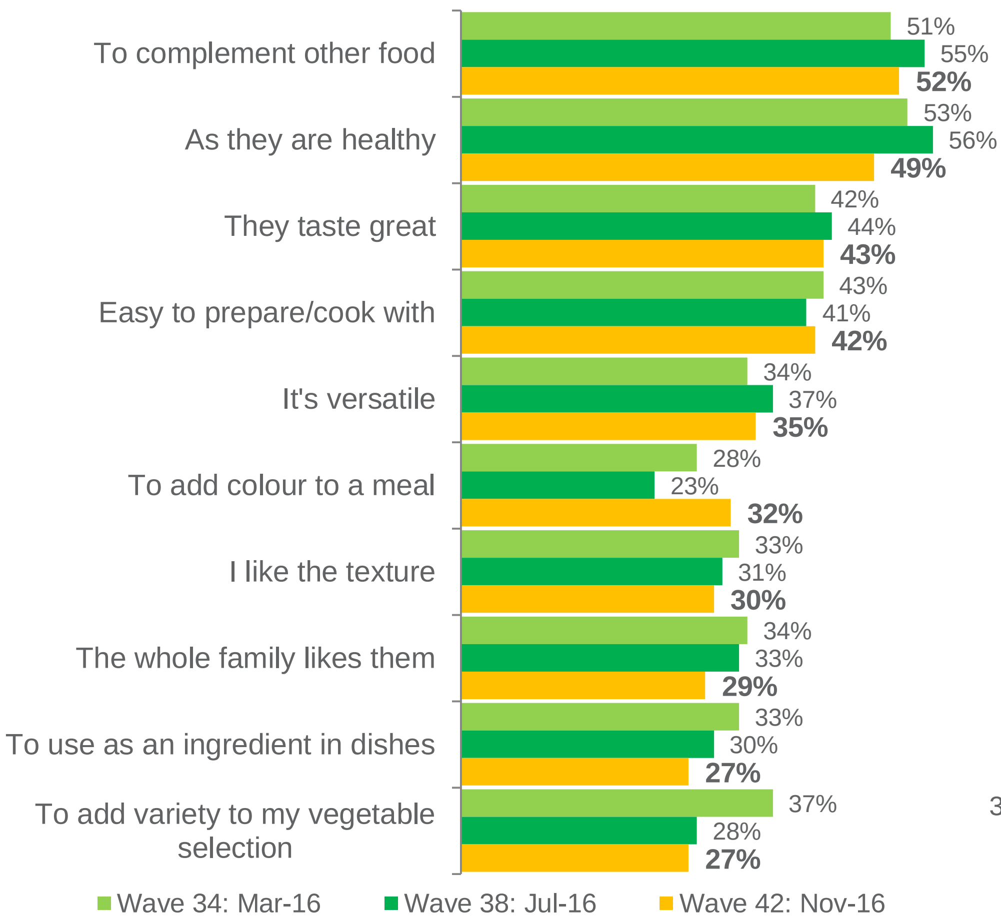
Several lettuce types recalled are not actually lettuce, although consumers perceive them to be, such as rocket, endive and radicchio.



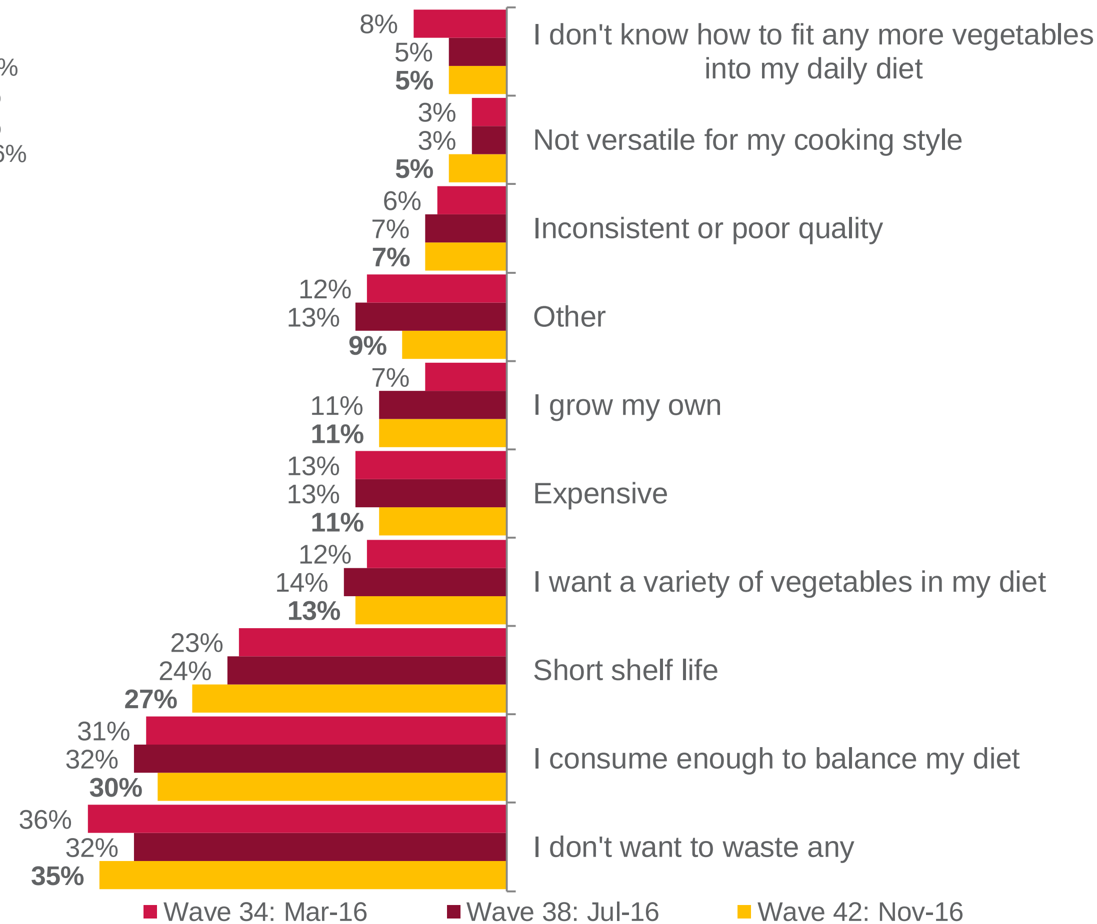
Q6a. What types/varieties of <commodity> are you aware of? (unprompted)
Sample Wave 34 N=304, Wave 38 N=302, Wave 42 N=313

Triggers to purchase lettuce are to complement other food, health and taste. Not wanting to waste any and already consuming enough and are key barriers to purchase, with perceptions of short shelf life increasing as a barrier over the last three waves.

Triggers



Barriers



Q7. Which of the following reasons best describes why you purchase <commodity> ?
Q8. Which reason best describes why you don’t buy <commodity> more often?
Sample Wave 34 N=304, Wave 38 N=302, Wave 42 N=313

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

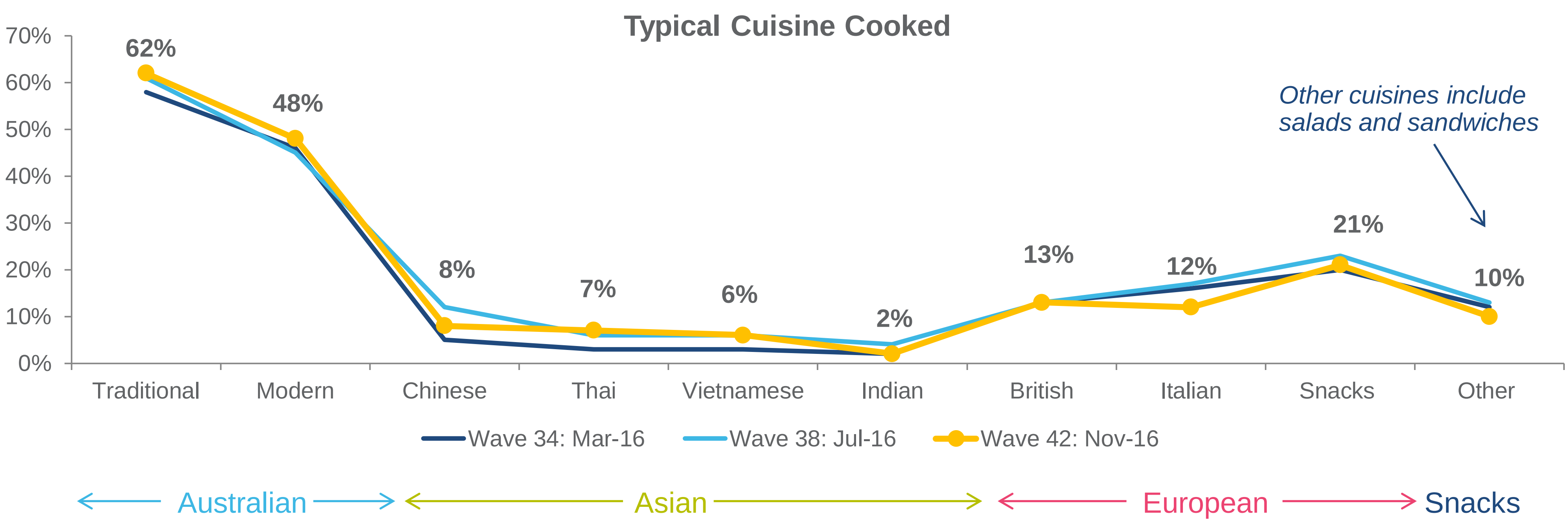
Lettuce consumption continues to be most popular during lunch and dinner occasions.

Top 5 Consumption Occasions

	Wave 38	Wave 42
Lunch	72%	67%
Dinner	58%	60%
Quick Meals	51%	52%
Weekday meals	47%	45%
Family meals	51%	44%

6% used lettuce when cooking a new recipe

▲ 7%, Wave 38



Q10. What cuisines do you cook/consume that use <commodity> ?
Q11. Which of the following occasions do you typically consume/use <commodity> ?
Sample Wave 34 N=304, Wave 38 N=302, Wave 42 N=313

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

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

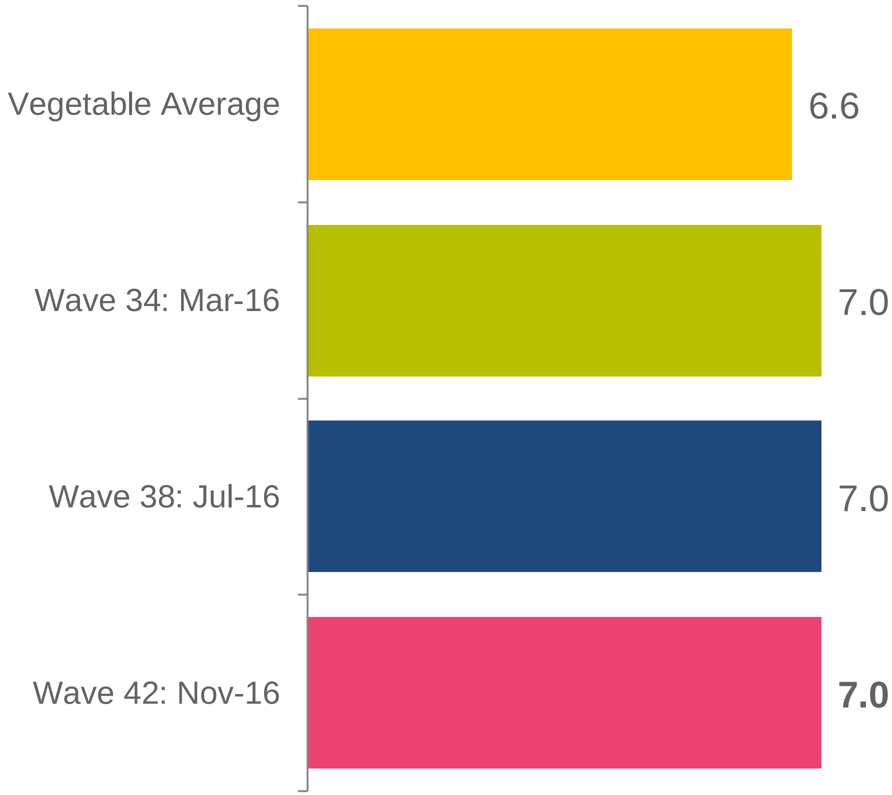
Accompanying Vegetables

Tomato	87% ▲
Capsicum	53% ▲
Cucumber	52% ▼
Carrot	50% ▲
Onion	42% ▼

Top 10 Cooking Styles			
	Wave 34	Wave 38	Wave 42
Raw	76%	78%	76%
Other	21%	17%	18%
Stir frying	3%	6%	5%
Soup	2%	3%	3%
Roasting	0%	0%	2%
Grilling	1%	0%	2%
Steaming	1%	2%	2%
Microwave	0%	1%	1%
Mashing	0%	1%	1%
Frying	0%	1%	1%

Q9. How do you typically cook <commodity> ?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
Sample Wave 34 N=304, Wave 38 N=302, Wave 42 N=313

Lettuce provenance has remained stable over the last three waves. Knowing that lettuce is grown in Australia remains highly important information for consumers.



8.3 ▽

Wave 38: **8.4**

Q14. When purchasing <commodity>, how important is Provenance to you?
Q15. And when purchasing Lettuce, how important is that it is grown in Australia?
Sample Wave 34 N=304, Wave 38 N=302, Wave 42 N=313

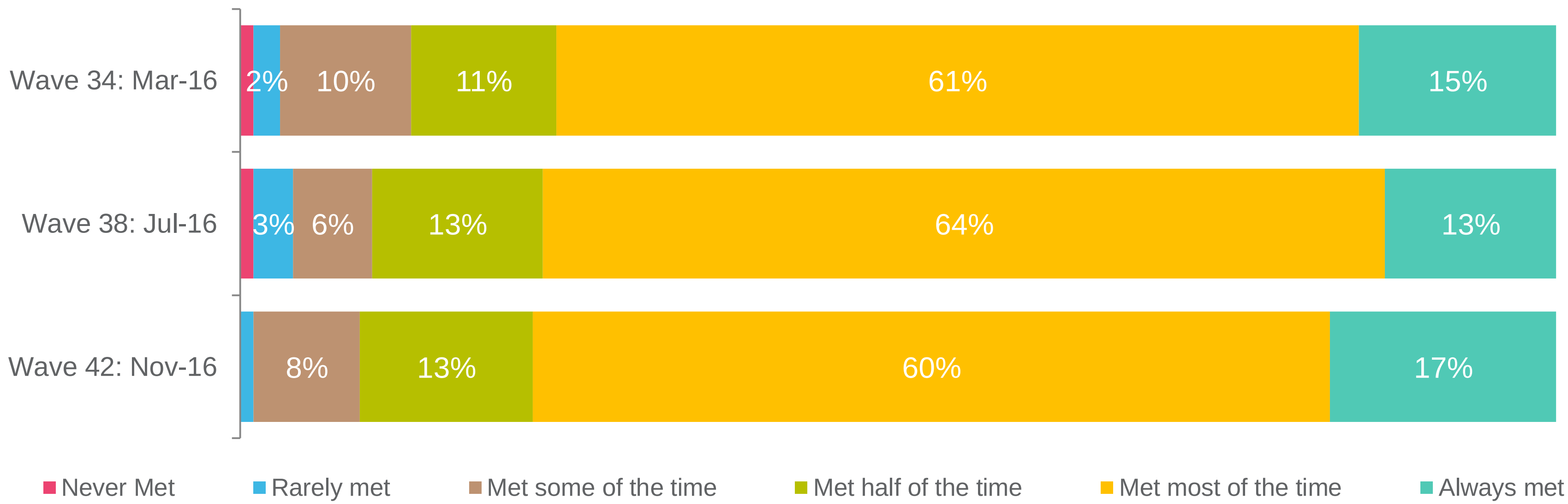
Expected shelf-life has decreased this wave and is expected to last for around 8 days.

These expectations are being increasingly met all of the time.

Expected to stay fresh for **8.0** days

▲ 8.4 days, Wave 34
▲ 8.5 days, Wave 38

Expectations Met



Q12. How long do you expect <commodity> to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy <commodity> ?
Sample Wave 34 N=304, Wave 38 N=302, Wave 42 N=313

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

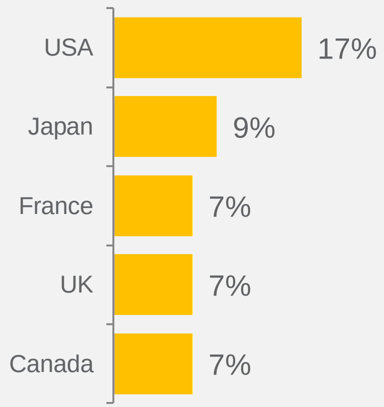
Lettuce Product Launch Trends.

Lettuce Global Launches

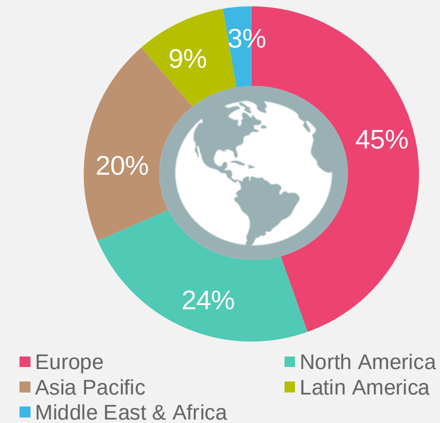
August – November 2016

There were 184 products launched globally over the last three months that contained lettuce as an ingredient. The main regions for launches were Europe and North America. Product launches were primarily meals and fruit & vegetables.

Country

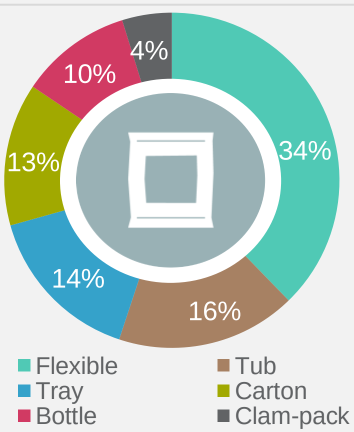


Region



184 Global NPDs

Top Pack Formats



Categories

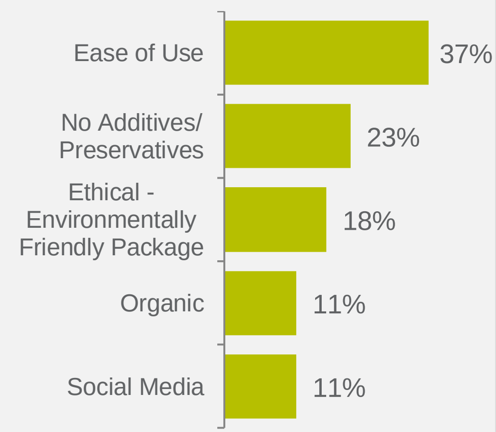
Meals 51%

Fruit & Vegetables 25%

Juice Drinks 17%

Sauces & Seasonings 3%

Top Claims

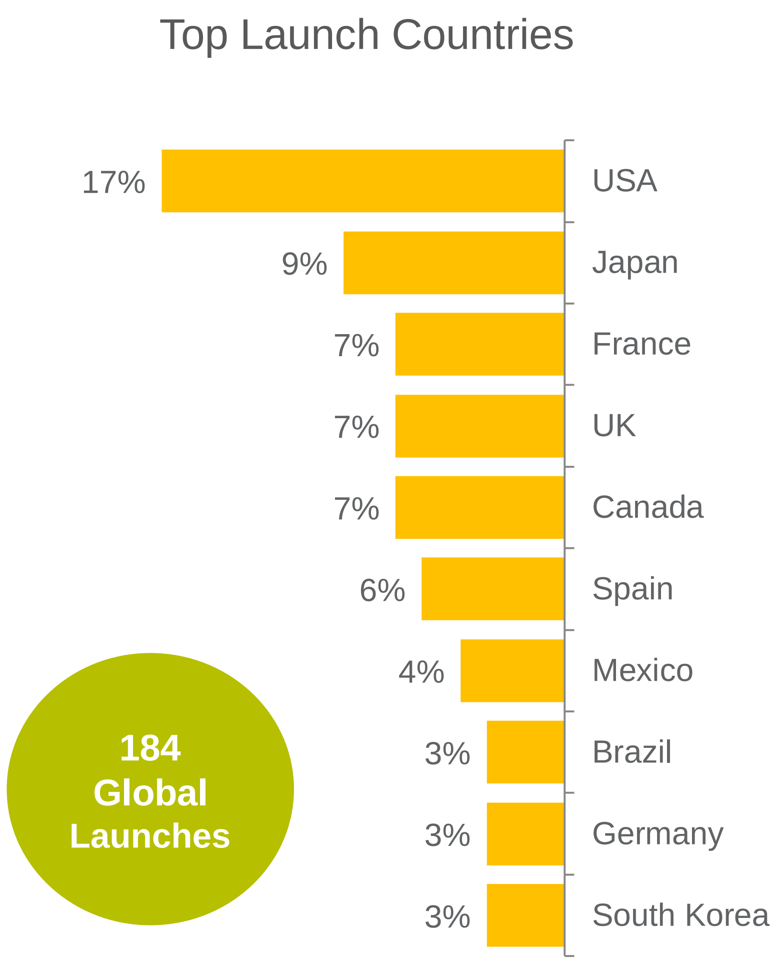


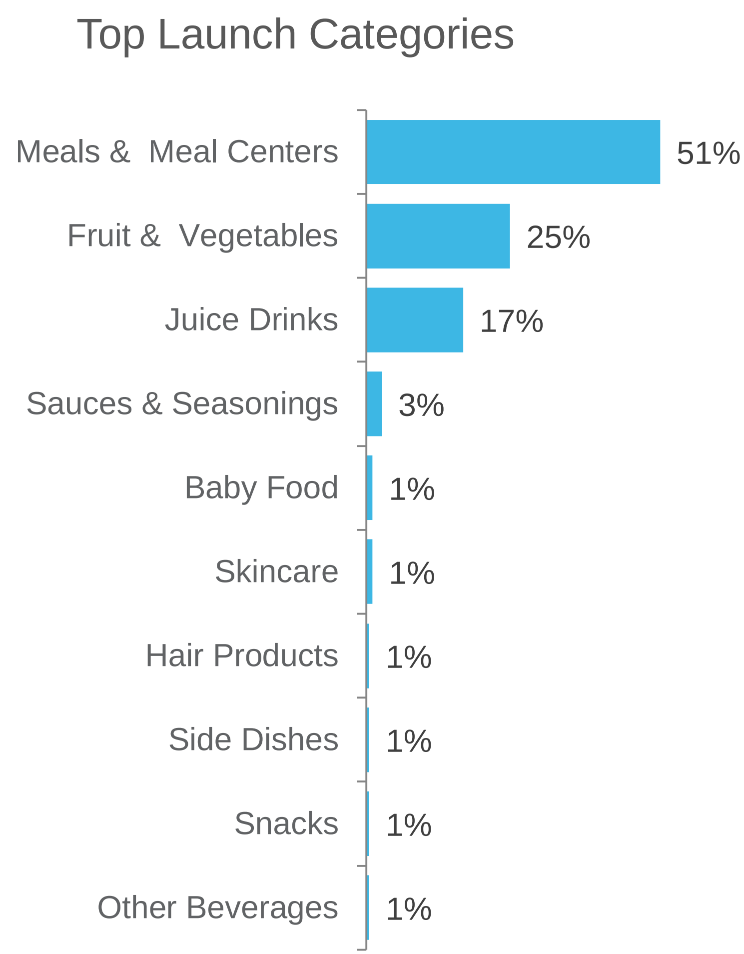
Lettuce Product Launches:
Last 3 Months (August – November 2016)
Summary

- Globally, there were 184 products launched, slightly lower than the previous wave.
- There were no products launched containing lettuce as an ingredient launched in Australia over the last 3 months.
- The majority of products were launched in Europe (45%) and North America (24%).
- Flexible formats (34%) and tubs (16%) were the main packaging formats used.
- The top categories for launches were meals (51%), fruit and vegetables (25%) and juice drinks (17%), which was consistent with previous trends.
- The key claims used over the past three months were ease of use (37%), no additives and preservatives (23%) and environmentally friendly packaging (18%).
- The most innovative launch found was the Lunch Box with Smoked Salmon from Poland. Examples can be found over the next slides.

Source: Mintel (2016)

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





Top claims used included ease of use and no additives and preservatives. Flexible packs and tubs were the most commonly used formats.

Pack Formats Used

Global	Flexible	34%
Global	Tub	16%
Global	Tray	14%
Europe	Flexible	43%
Europe	Tray	18%
Europe	Carton	15%
North America	Flexible	48%
North America	Bottle	20%
North America	Tub	18%

Top Claims Used

Global	Ease of Use	37%
Global	No Additives/Preservatives	23%
Global	Ethical - Environmentally Friendly Package	18%
Europe	Ease of Use	45%
Europe	Ethical - Environmentally Friendly Package	21%
Europe	No Additives/Preservatives	18%
North America	Ease of Use	45%
North America	Kosher	34%
North America	Organic	34%

Only regions with n >30 are displayed

Innovative Lettuce Launches:
L3M (August – November 2016)

Mini Drink6 Nutrimedic Vegetable, Pineapple, and Passionfruit Juice Drink (Spain)

Mini Drink6 Nutrimedic Bebida de Zumo de Verduras, Piña, y Maracuyá (Vegetable, Pineapple, and Passionfruit Juice Drink) is new to the range. This 100% natural drink is suitable for vegetarians, also contains spinach, cucumber, and kale, and retails in a 250ml bottle.

Claims:
All Natural Product, Vegetarian

Lidl Pomysl na Kazdy Dzien Lunch Box with Smoked Salmon (Poland)

Lidl Pomysl na Kazdy Dzien Lunch Box z Wedzonym Lososiem (Lunch Box with Smoked Salmon) is now available.The product contains vegetable salad with smoked salmon and dill and yogurt sauce. It is washed and ready to eat, and retails in a 170g pack including a fork.

Claims:
Ease of Use

Lawson 108 Sweet Corn Fresh Salad (Thailand)

Lawson 108 Sweet Corn Fresh Salad is now available. The product retails in an 80g pack.

Claims:
N/A

Marks & Spencer Salads Fruits & Vegetables New Potato, Tomato & Egg Salad with Salad Cream Dressing (UK)

Marks & Spencer Salads Fruits & Vegetables New Potato, Tomato & Egg Salad with Salad Cream Dressing is new to the range. This product provides one of the five a day and retails in a recyclable 300g pack.

Claims:
Ethical - Environmentally Friendly Package

Source: Mintel (2016)

Innovative Lettuce Launches:

L3M (August – November 2016)

Seven & i Premium Crispy Noodle Salad (Japan)

Seven & i Premium Crispy Noodle Salad features domestic vegetables including lettuce and green leaves from Nagano, cucumber from Yamagata, carrots from Hokkaido and purple cabbage from Ibaraki. The product comes with sesame dressing and retails in a 70g pack, featuring a QR code. Launched in September 2016 with an RRP of 324 yen.

Claims:
Premium, Economy

Green Way Premium Salad (Brazil)

Green Way Salada Premium (Premium Salad) is now available. The gluten-free product retails in a 500g pack.

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

Woolworths Food Good to Go Steak with Caramelised Onion Sandwich (South Africa)

Woolworths Food Good to Go Steak with Caramelised Onion Sandwich has been relaunched as part of the Good to Go range, featuring an improved recipe. This product retails in a recyclable single-unit pack.

Claims:
Ethical - Environmentally Friendly Package, On-the-Go

Taylor Farms Shredded Iceberg Lettuce (USA)

Taylor Farms Shredded Iceberg Lettuce is now available. This washed and ready-to-enjoy kosher certified product comprises crisp shredded lettuce and is said to be perfect for tacos, sandwiches and salads. It is free from preservatives and retails in a 32-oz. pack featuring a recipe suggestion, and bearing a QR code.

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

Source: Mintel (2016)

Innovative Lettuce Launches:
L3M (August – November 2016)

Penny to Go Salad Mix with Meatballs, Garden Radishes and Roasted Onions (Germany)

Penny to Go Salatmix mit Hackbällchen, Radieschen und Röstzwiebeln (Salad Mix with Meatballs, Garden Radishes and Roasted Onions) comprises 100g salad mix, 70ml mustard dressing, 45g meat balls, 40g garden radishes, and 20g roasted onions. The product retails in a 275g pack including a fork.

Claims:
On-the-Go

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

BluePrint Organic Kale-A-Lu-Ya Kombucha Drink comprises handcrafted kombucha blended with organic cold-pressed kale, spinach and parsley juice. The kosher and USDA Organic certified drink contains 15% juice and is free of gluten. It is said to be an excellent source of antioxidant vitamin A and a highly intelligent way to get the greens.

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

True Organic Organic Kaleifornia Juice Smoothie (Canada)

True Organic Organic Kaleifornia Juice Smoothie comprises a blend of juices from and not from concentrate with added ingredients including 24 kale leaves, 13 oranges, one chard leaf, 3/7 lemon, seven and two thirds lettuce leaves, half a pear, two thirds of an apple and a vegetable blend. This gluten-free, USDA organic and kosher certified product contains no added sugar and retails in an 828ml pack.

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

M&S Roast Chicken, Houmous & Pomegranate (Ireland)

M&S Roast Chicken, Houmous & Pomegranate contains seared chicken breast, houmous, Moroccan couscous, dried fruit salad, cucumber, tomato and spinach salad with and a feta, cumin and yogurt dressing and is topped with pomegranate and toasted pumpkin seeds. The product retails in a 315g pack.

Claims:
N/A

Source: Mintel (2016)

Sweet Corn.

Both average purchase and consumption have continued to increase this wave.

Purchase remains primarily through Woolworths and Coles. There has been a decline in purchase from specialist vegetable retailers over the last three waves.

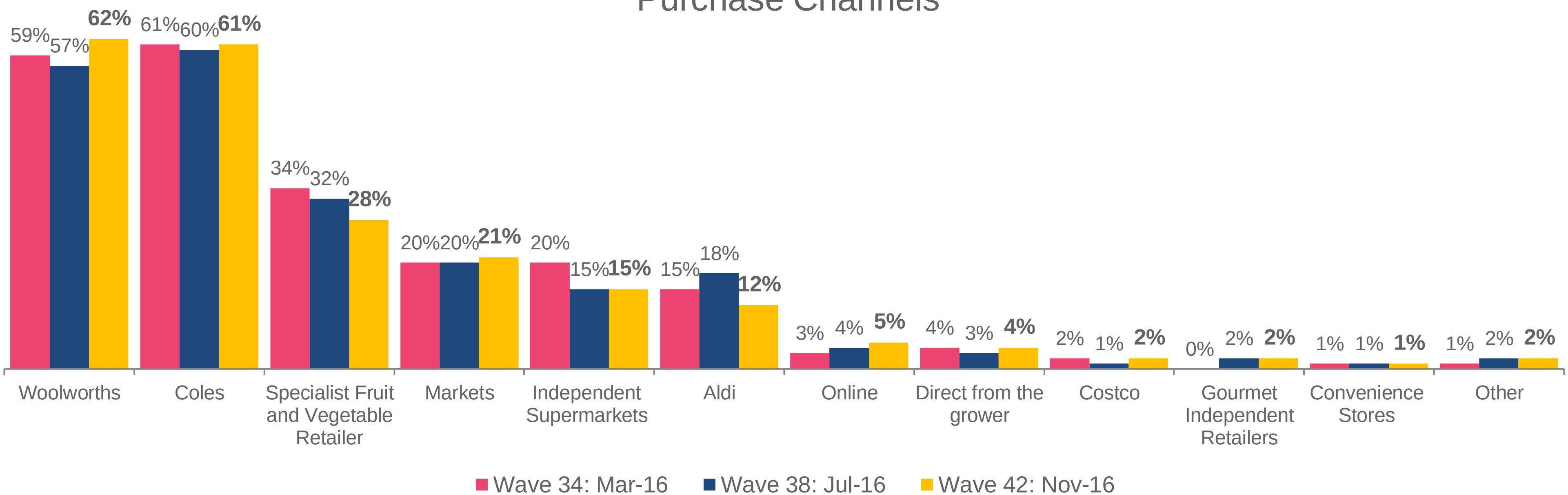
Average Purchase **4.1** times per month

▼ 3.6 times, Wave 34
▼ 3.9 times, Wave 38

Average Consumption **7.2** times per month

▼ 6.6 times, Wave 34
▼ 6.9 times, Wave 38

Purchase Channels



Q1. On average, how often do you purchase <commodity>?
Q2. On average, how often do you consume <commodity>?
Q5. From which of the following channels do you typically purchase <commodity>?
Sample Wave 34 N=310, Wave 38 N=303, Wave 42 N=307

▼: 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 sweet corn, which is higher than previous waves.

▼ 0.9kg, Wave 34
▼ 0.8kg, Wave 38

Recalled last spend

Recalled last spend on sweet corn was **$4.30,** which has increased over the last three waves.

▼ $3.30, Wave 34
▼ $3.60, Wave 38

Value for money

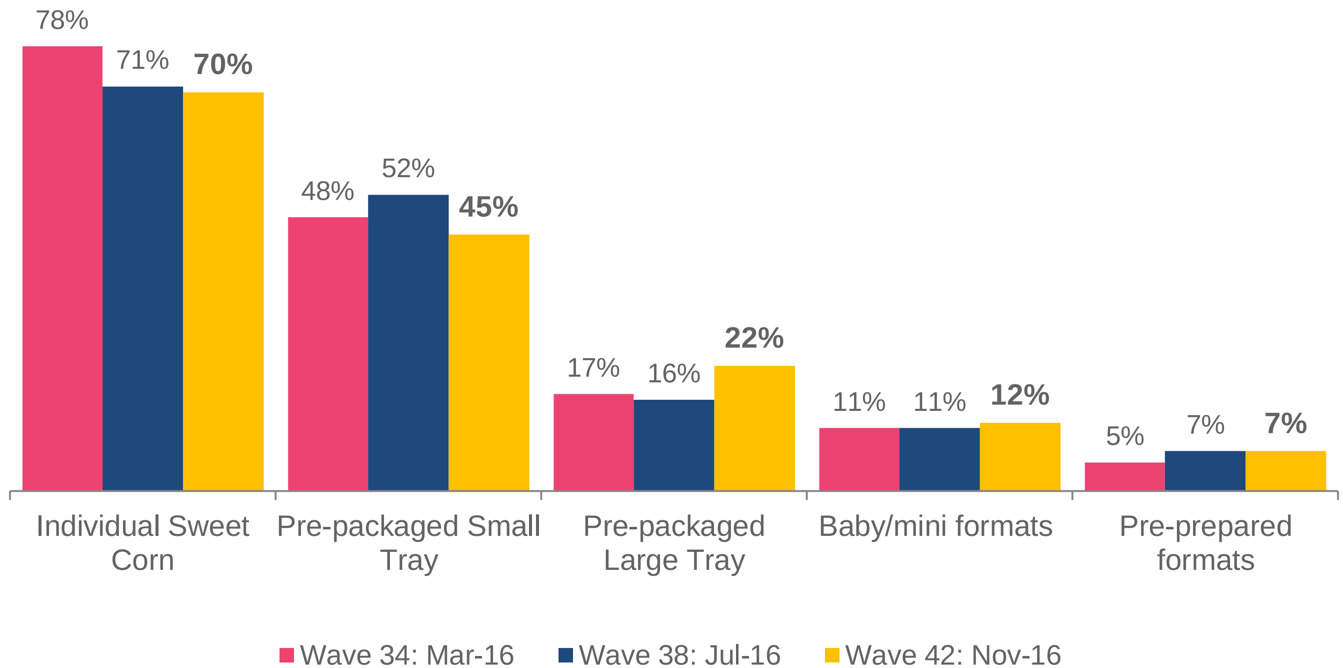
Consumers' perceived value for money was good **(6.5/10)**, which has slightly declined this wave.

▲ 6.9/10, Wave 34
▲ 7.0/10, Wave 38

Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is?
Sample Wave 34 N=310, Wave 38 N=303, Wave 42 N=307

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

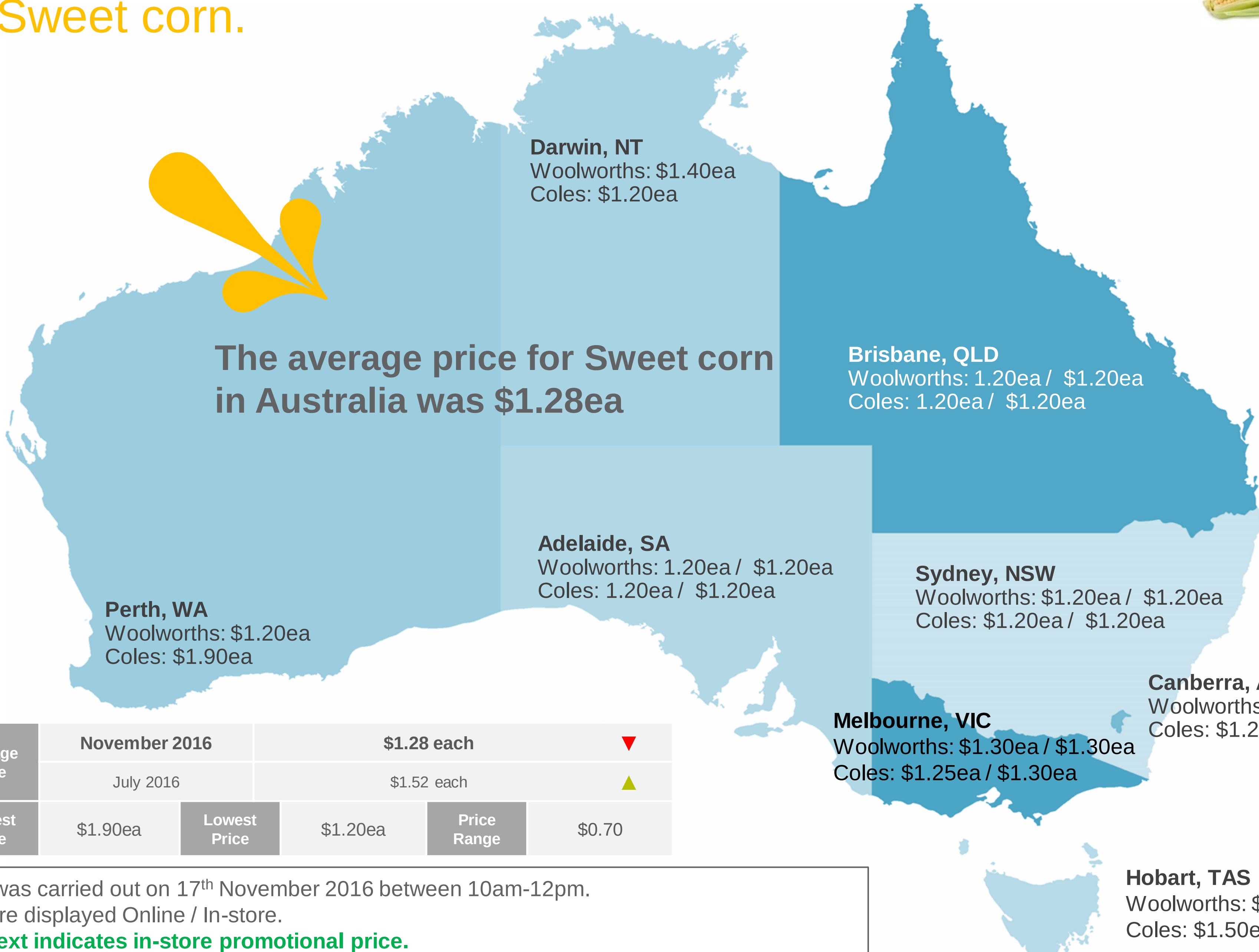
Individual cobs and small trays of corn remain the most common formats purchased. Pre-packaged large trays are also a relatively popular format.



Q4b In what fresh formats do you typically purchase Sweet Corn?
Sample Wave 34 N=310, Wave 38 N=303, Wave 42 N=307

Online and In-store Commodity Prices.

Sweet corn.

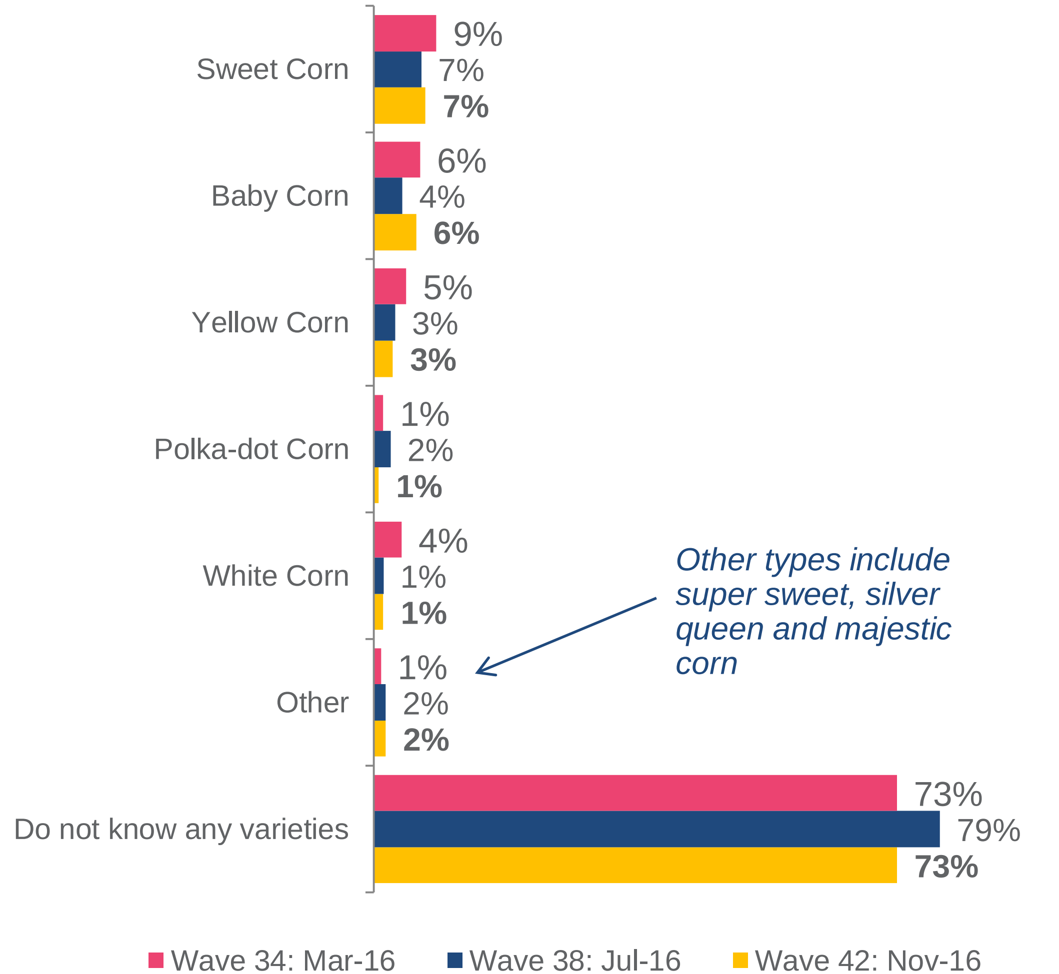


Average Price	**November 2016**	**$1.28 each** ▼			
	July 2016	$1.52 each ▲			
Highest Price	$1.90ea	**Lowest Price**	$1.20ea	**Price Range**	$0.70

Pricing was carried out on 17th November 2016 between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates in-store promotional price.

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

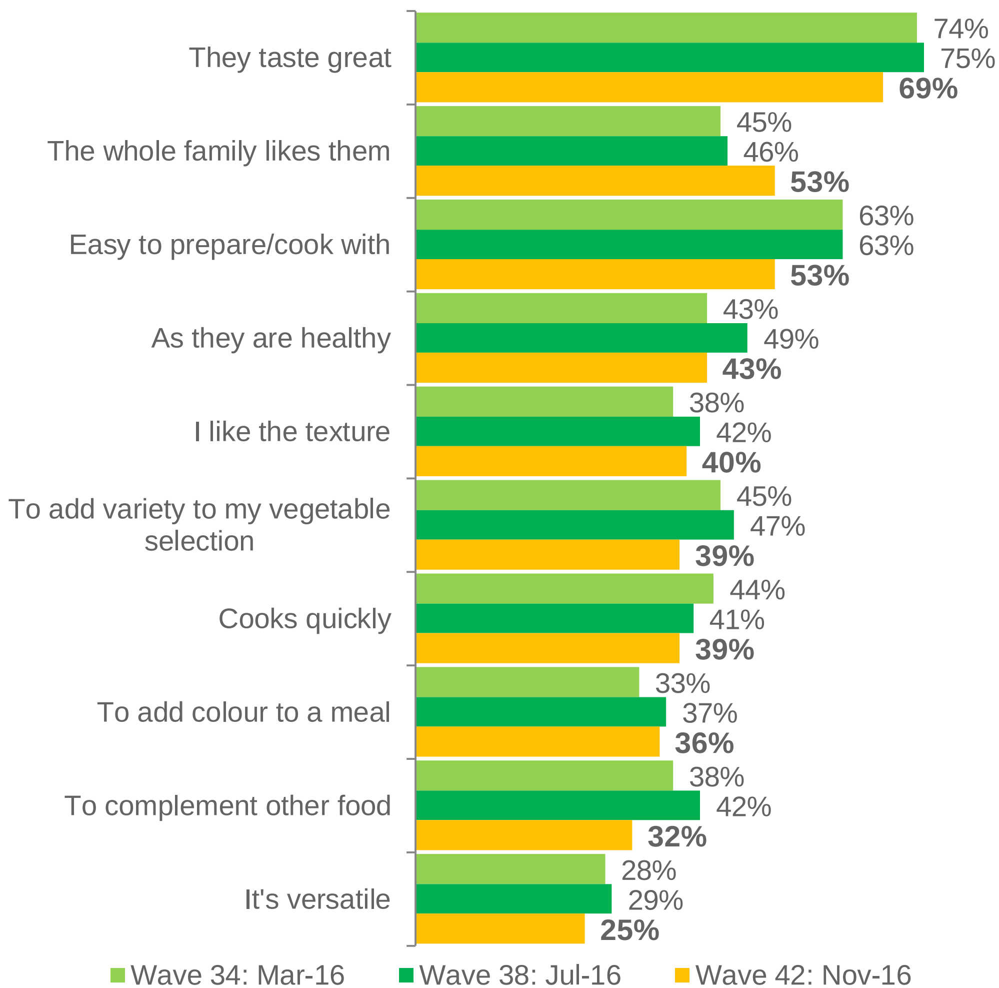
Sweet corn in general remains the most recalled type.



Q6a. What varieties of <commodity> are you aware of? (unprompted)
Sample Wave 34 N=310, Wave 38 N=303, Wave 42 N=307

The key triggers to purchasing sweet corn are taste and that the whole family likes them. Key barriers for consumers include wanting a variety and not wanting to waste any.

Triggers



Barriers

Q7. Which of the following reasons best describes why you purchase <commodity>?
Q8. Which reason best describes why you don't buy <commodity> more often?
Sample Wave 34 N=310, Wave 38 N=303, Wave 42 N=307

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

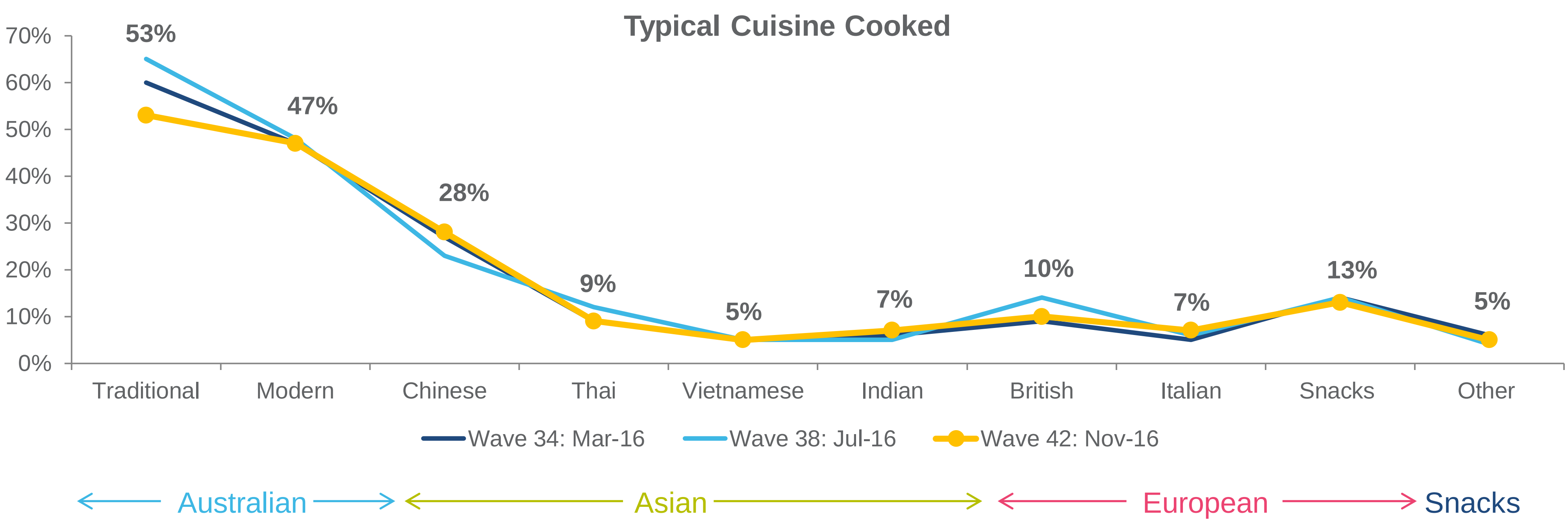
Dinner and family meals remain the main meal occasions for corn.

Top 5 Consumption Occasions

	Wave 38	Wave 42
Dinner	70%	66%
Family meals	57%	57%
Quick Meals	31%	41%
Weekday meals	43%	40%
Weekend meals	39%	36%

10% used sweet corn when cooking a new recipe

▼ 8%, Wave 38



Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?
Sample Wave 34 N=310, Wave 38 N=303, Wave 42 N=307

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

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

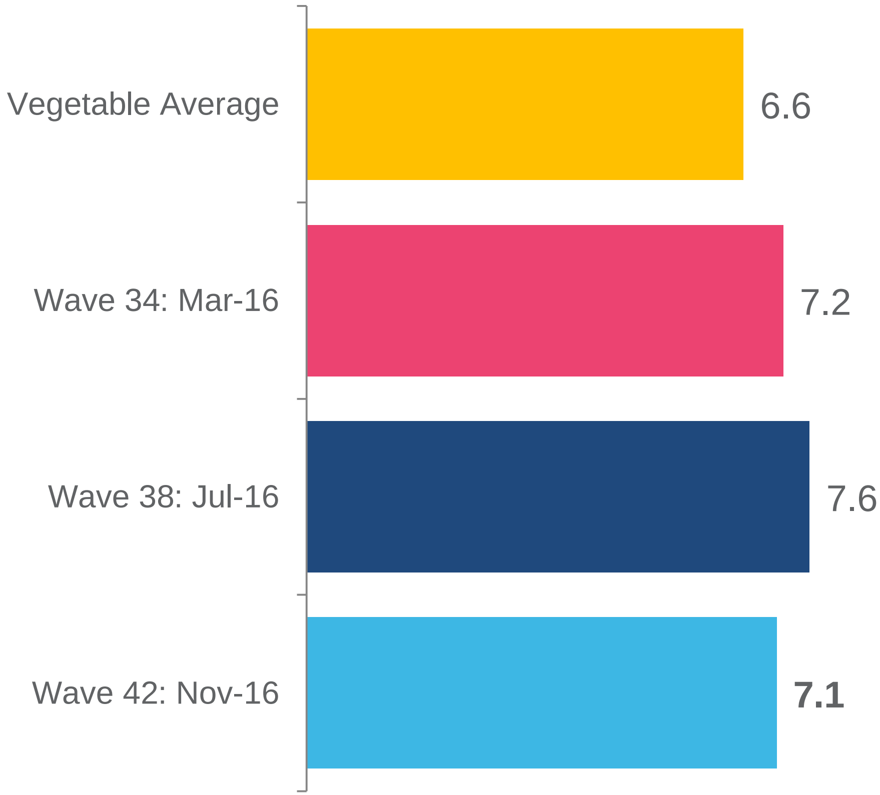
Accompanying Vegetables

Carrot	54%
Potato	52%
Broccoli	34%
Green Peas	31%
Beans	27%

Top 10 Cooking Styles			
	Wave 34	Wave 38	**Wave 42**
Boiling	53%	58%	**51%**
Steaming	42%	47%	**45%**
Microwave	28%	26%	**26%**
Stir frying	22%	25%	**22%**
Grilling	18%	17%	**19%**
Roasting	10%	15%	**14%**
Soup	17%	18%	**14%**
Slow Cooking	8%	8%	**9%**
Baking	5%	8%	**8%**
Raw	8%	9%	**7%**

Q9. How do you typically cook <commodity>?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
Sample Wave 34 N=310, Wave 38 N=303, Wave 42 N=307

Consumers perceive that knowing that their sweet corn is grown in Australia is highly important information. The importance of provenance has slightly declined this wave.



8.0 ▽

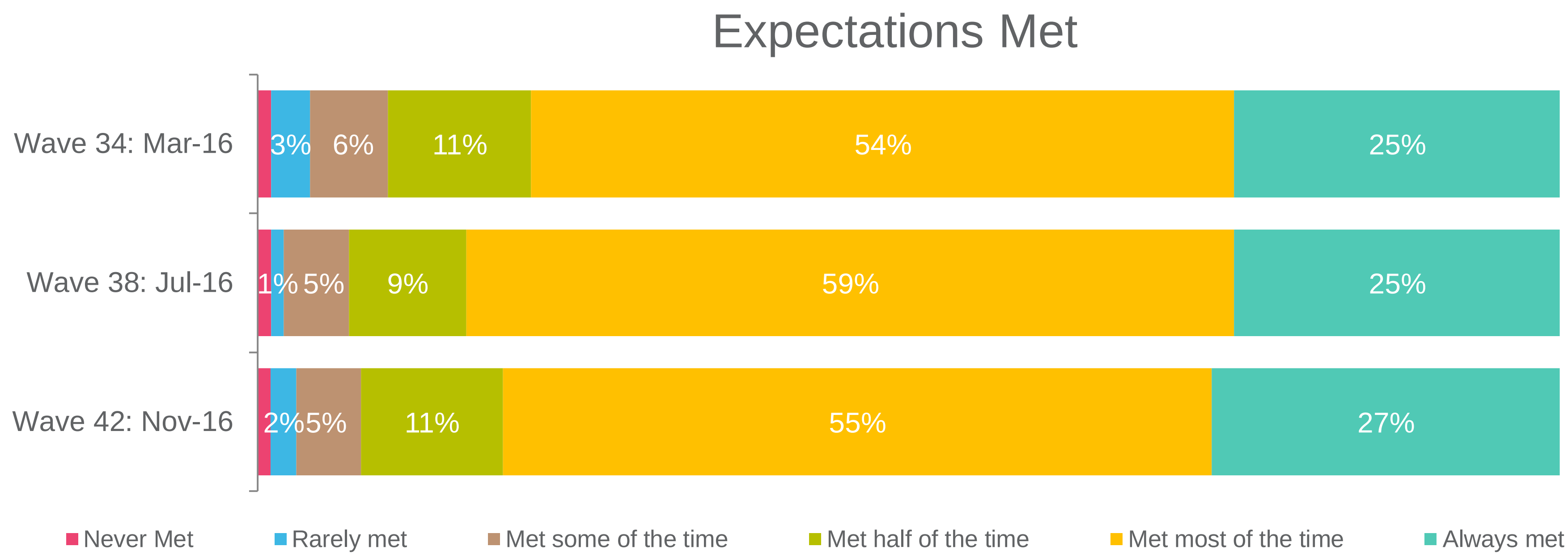
Wave 38: **8.5**

Q14. When purchasing <commodity>, how important is Provenance to you?
Q15. And when purchasing Sweet Corn, how important is that it is grown in Australia?
Sample Wave 34 N=310, Wave 38 N=303, Wave 42 N=307

Sweet corn is expected to stay fresh for just over a week, which is relatively consistent with past waves. Expectations of freshness are being met most of the time.

Expected to stay fresh for **8.0** days

▲ 8.2 days, Wave 34
▲ 8.3 days, Wave 38



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 34 N=310, Wave 38 N=303, Wave 42 N=307

Horticulture Innovation Australia
colmar brunton.

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

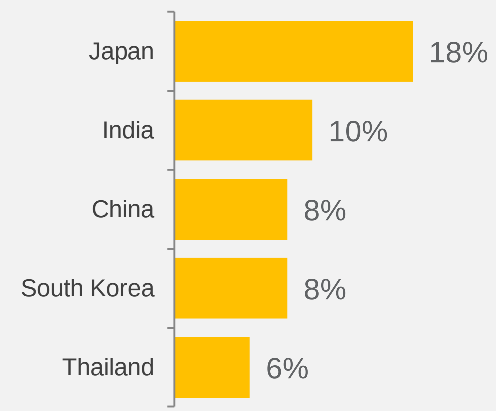
Sweet Corn Product Launch Trends.

Sweet Corn Global Launches

August – November 2016

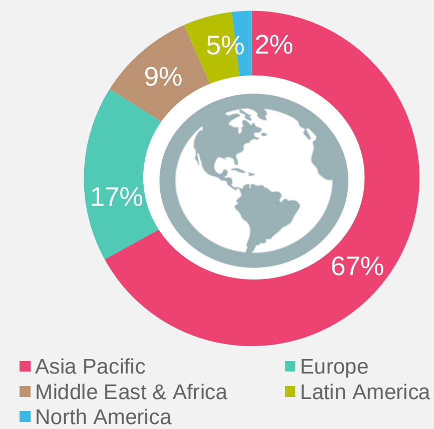
There were 106 sweet corn products launched globally over the last three months. The countries with the most launches were Japan and India. Key categories for launches were fruit & vegetables products, and snacks. Flexible packaging was most popularly utilised.

Country

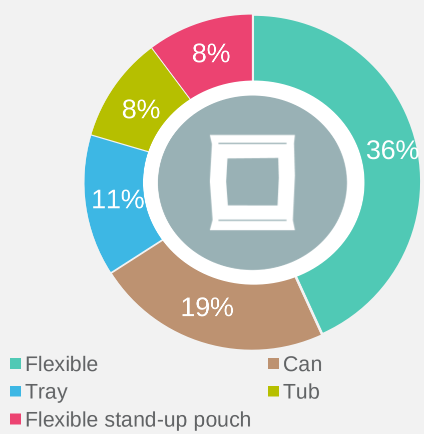


106 Global NPDs

Region



Top Pack Formats



Categories

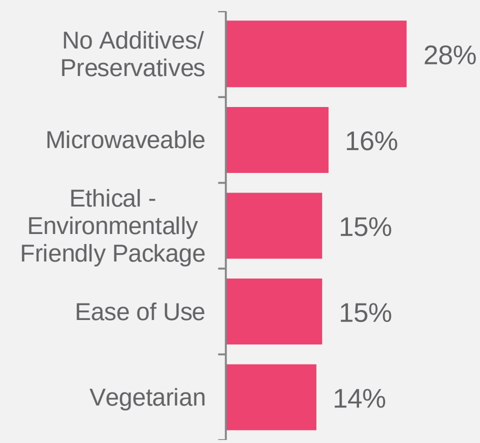
Fruit & Vegetables 32%

Snacks 16%

Soup 14%

Meals 12%

Top Claims

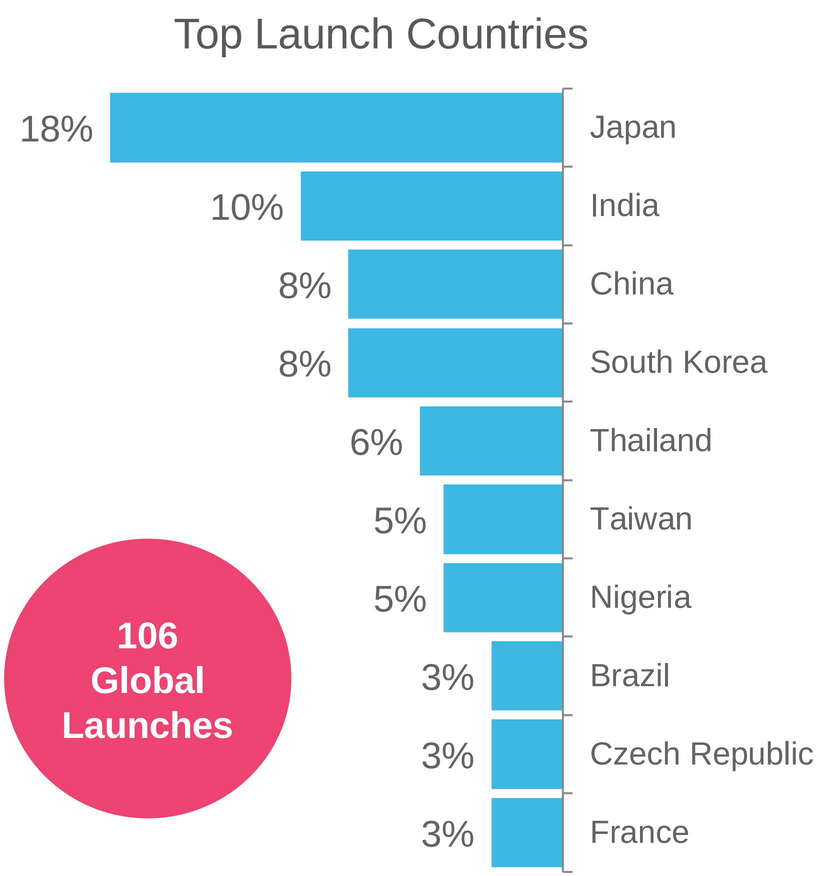


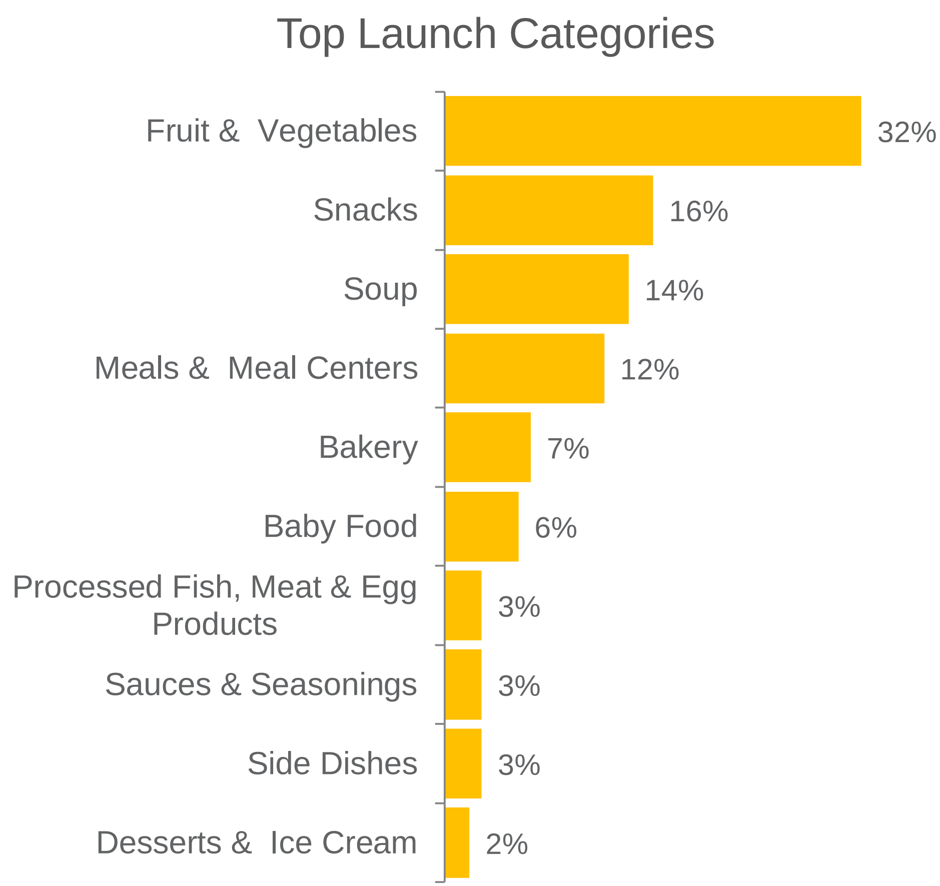
Sweet Corn Product Launches:
Last 3 Months (August – November 2016)
Summary

- There were 106 product launches in the past 3 months globally that contained sweet corn as an ingredient, relatively consistent with the previous wave.
- There was one product launched in Australia over the past three months.
- Asia Pacific (67%) and Europe (17%) were the key regions for launches.
- Flexible packaging (36%) remained the most common format used for products.
- The main categories for launches were fruits & vegetables (32%), snacks (16%) and soup (14%).
- Claims used on products included no additives/preservatives (28%), microwaveable (16%), and ethical – environmentally friendly package (15%).
- The most innovative product launched was Sweet Corn Ice Cream from China. Other examples can be found in the following pages.

Source: Mintel (2016)

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





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The main claims globally were no additives & preservatives, microwaveable and ethical – environmentally friendly packaging. Flexible packaging is primarily used for sweet corn products, consistent with previous waves.

Pack Formats Used

Global	Flexible	36%
	Can	19%
	Tray	11%
Asia Pacific	Flexible	46%
	Tray	15%
	Flexible stand-up pouch	10%

Top Claims Used

Global	No Additives/Preservatives	28%
	Microwaveable	16%
	Ethical - Environmentally Friendly Package	15%
Asia Pacific	No Additives/Preservatives	35%
	Microwaveable	17%
	Vegetarian	17%

Only regions with n >30 are displayed

Innovative Sweet Corn Launches:

L3M (August – November 2016)

Pamonha Gourmet Savory Sweetcorn Dessert (Brazil)

Pamonha Gourmet Pamonha (Savory Sweetcorn Dessert) is now available. The product is a typically Brazilian dish, made from the purest corn, and was specially designed to provide practicality and facility for the day-to-day, as well as guaranteeing a nutritious, quick and tasty meal. It is free from gluten, artificial colors, flavors or preservatives, suitable for vegetarians, and can be microwaved.

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

Sippy Boiled Corn on Cob (Malaysia)

Sippy Boiled Corn on Cob is a 100% natural, pre-cooked product without preservatives. It is microwaveable and ready to eat, and retails in single unit pack.

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

Kewpie Corn & Mixed Bean Salad (Thailand)

Kewpie Corn & Mixed Bean Salad is said to be fresh, clean and safe from toxins. It comes with a sachet of Thousand Island Japanese recipe salad dressing which is halal certified, free from MSG and contains 50% less fat and sugar. The product retails in a 120g pack with a 50g Thousand Island salad dressing.

Claims:
No Additives/Preservatives, Low/No/Reduced Fat, Low/No/Reduced Sugar, Halal

Bambino Pastta Instant Nutritious Creamy Cheese Fusilli Pasta (Sri Lanka)

Bambino Pastta Instant Nutritious Creamy Cheese Fusilli Pasta is made with 100% durum wheat semolina, and contains no cholesterol or trans fat. This vegetarian product is a good source of protein, a source of fibre, and is said to be ready in just three minutes. It can be prepared in a microwave, and retails in a 68g pack.

Claims:
Low/No/Reduced Cholesterol, Microwaveable, Vegetarian, Low/No/Reduced Transfat, Time/Speed

Source: Mintel (2016)

Innovative Sweet Corn Launches:
L3M (August – November 2016)

Sun & Veg's Radiant Menorca Mediterranean Smoothie (France)

Sun & Veg's Rayonnant Menorca le Smoothie Méditerranéen (Radiant Menorca Mediterranean Smoothie) contains 89% fruits and 10% vegetables. This product comprises pineapple, coconut, lettuce and mango with hemp seeds, has no sugar added, lactose or gluten, and retails in a 250g pouch featuring the Facebook, Instagram and Twitter logos. This product was on display at SIAL 2016 in Paris, France.

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

Sarchio Piacere Bio Organic Sweet Corn (Spain)

Sarchio Piacere Bio Maíz Dulce Bio (Organic Sweet Corn) is now available. This organic certified product is source of fibre, is ideal for salads and retails in a 360g recyclable pack featuring the Facebook, CCPB organic certified and EU Green Leaf logos.

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

Green Giant Pearl Corn Paste (Taiwan)

Green Giant Pearl Corn Paste provides a smooth and rich taste. This ready to eat product can be served as a soup or as a dressing. It contains no GMO or preservatives, and retails in a 418g pack containing thee units.

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

Ajinomoto Knorr Zeitaku Yasai Hokkaido Sweet Corn Soup (Japan)

Ajinomoto Knorr Zeitaku Yasai Hokkaido Sweet Corn Soup has been repackaged. This limited edition and premium product is made with sweet corn from Hokkaido, harvested this summer, and retails in a 462g pack made with 80% recycled paper. Launched in September, 2016 with an RRP of 2,970 yen.

Claims:
Premium, Ethical - Environmentally Friendly Package, Limited Edition

Source: Mintel (2016)

Innovative Sweet Corn Launches:
L3M (August – November 2016)

Fujipan Corn Mayonnaise Bun (Japan)

Fujipan Corn Mayonnaise Bun is now available. This GMO-free product is topped with corn, mayonnaise and spicy cheese sauce, and retails in a single unit pack. Launched on October 1, 2016, open-priced.

Claims:
GMO-Free

Synear Jin Pai Xia Shrimp Corn Dumpling (China)

Synear Jin Pai Xia Xia Ren Yu Mi Shui Jiao (Dumpling with Shrimp and Corn) can be cooked by steaming and pan-frying. It is free from preservatives, and retails in a 480g pack containing 32 units.

Claims:
No Additives/Preservatives

Aperto Sweet Corn Ice Cream (China)

Aperto Yu Mi Xue Gao (Sweet Corn Ice Cream) is now available. The product retails in a 324g pack containing four 81g units.

Claims:
N/A

Heyroo Surimi Macaroni Salad (South Korea)

Heyroo Surimi Macaroni Salad is described as a savoury salad that is made of high quality crab meat, Italian pasta and vegetables. This delicate product retails in a 200g pack.

Claims:
N/A

Source: Mintel (2016)

Australian Sweet Corn Launches:
L3M (August – November 2016)

Weight Watchers Light Menu Mushroom & Pumpkin Risotto

Weight Watchers Light Menu Mushroom & Pumpkin Risotto is now available. The prepared and snap frozen product comprises creamy vegetable risotto with white wine and garlic. The microwavable risotto is described as a conveniently sized meal that what fits easily into the busy day. It is made with no artificial colours, is a source of protein, is 98% fat free, and retails in a recyclable 225g pack featuring eight smart points and a three out of five health star rating.

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

Source: Mintel (2016)

Green Peas.

There has been an increase in both purchase and consumption frequency this wave.

Green peas are generally purchased from mainstream retailers. This wave sees a decline in purchase from specialist vegetable retailers.

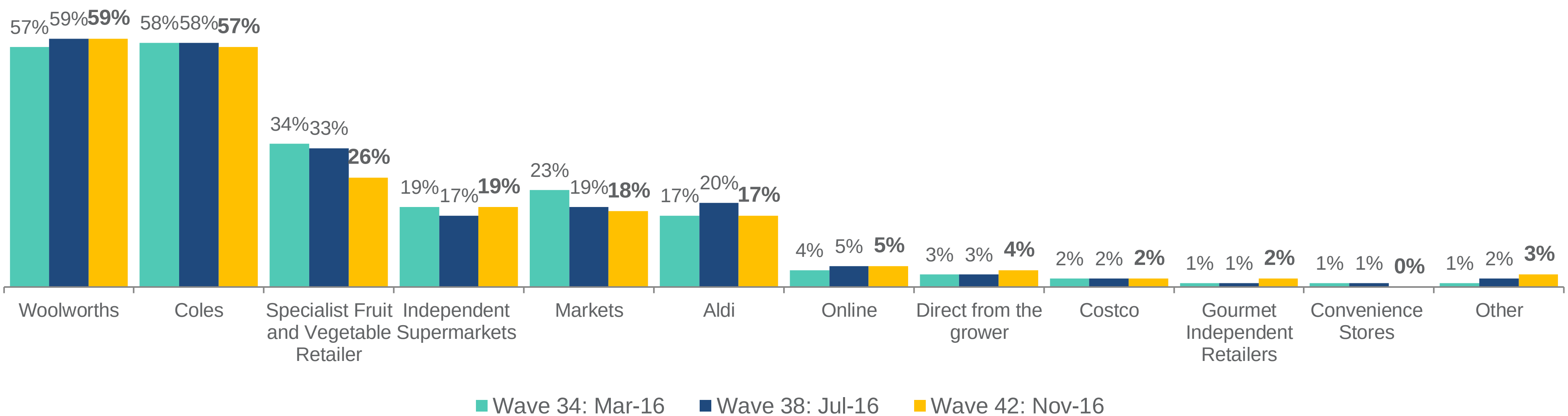
Average Purchase **4.6** times per month

▼ 4.2 times, Wave 34
▼ 4.0 times, Wave 38

Average Consumption **10.1** times per month

▼ 9.9 times, Wave 34
▼ 9.7 times, Wave 38

Purchase Channels



Q1. On average, how often do you purchase green peas?
Q2. On average, how often do you consume green peas?
Q5. From which of the following channels do you typically purchase green peas?
Sample Wave 34 N=307, Wave 38 N=304, Wave 42 N=306

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

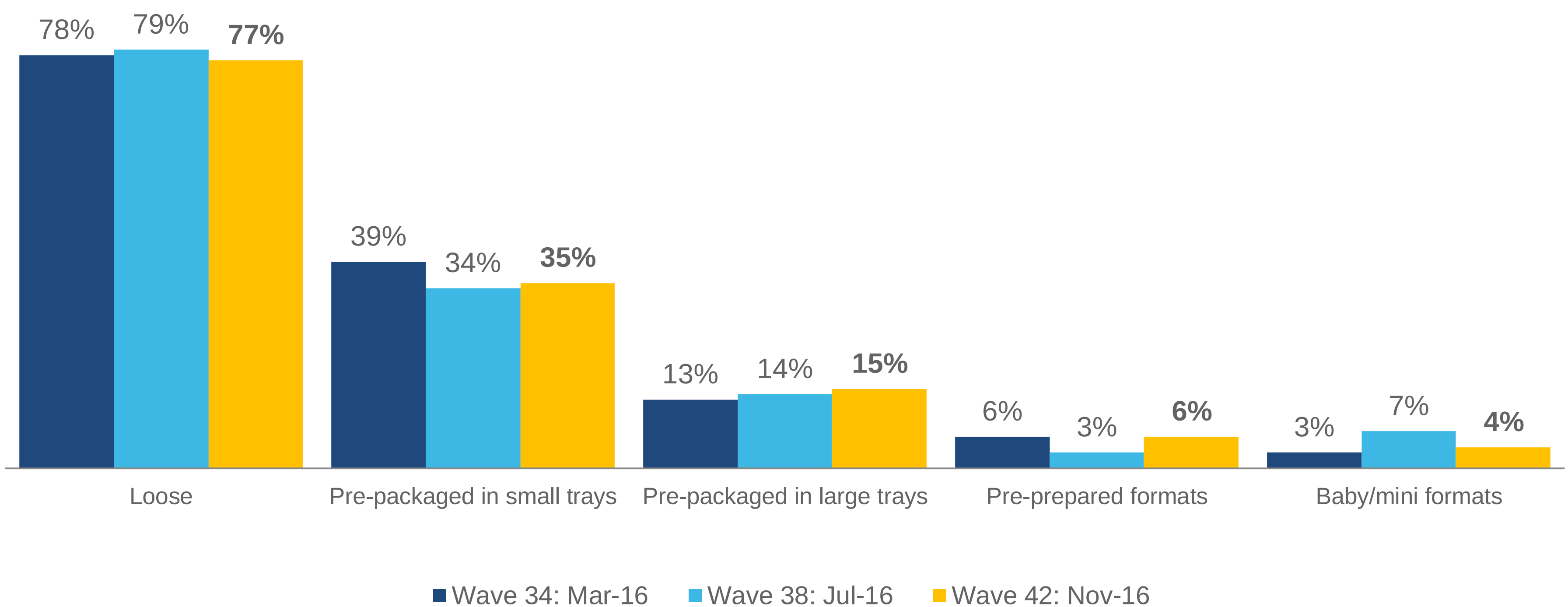
Average Spend and Price Sensitivity.

Average weight of purchase	Recalled last spend	Value for money
The average consumer typically purchases **700g** of green peas, consistent with the previous wave.	Recalled last spend on green peas is **$4.10**, which is marginally higher than the previous waves.	Consumers' perceived value for money is good for green peas **(6.5/10)**, consistent over the last three waves.
▼ 600g, Wave 34	▼ $3.80, Wave 34	— 6.5/10, Wave 34
— 700g, Wave 38	▼ $3.90, Wave 38	— 6.5/10, Wave 38

Q3. How much leek do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 34 N=307, Wave 38 N=304, Wave 42 N=306

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

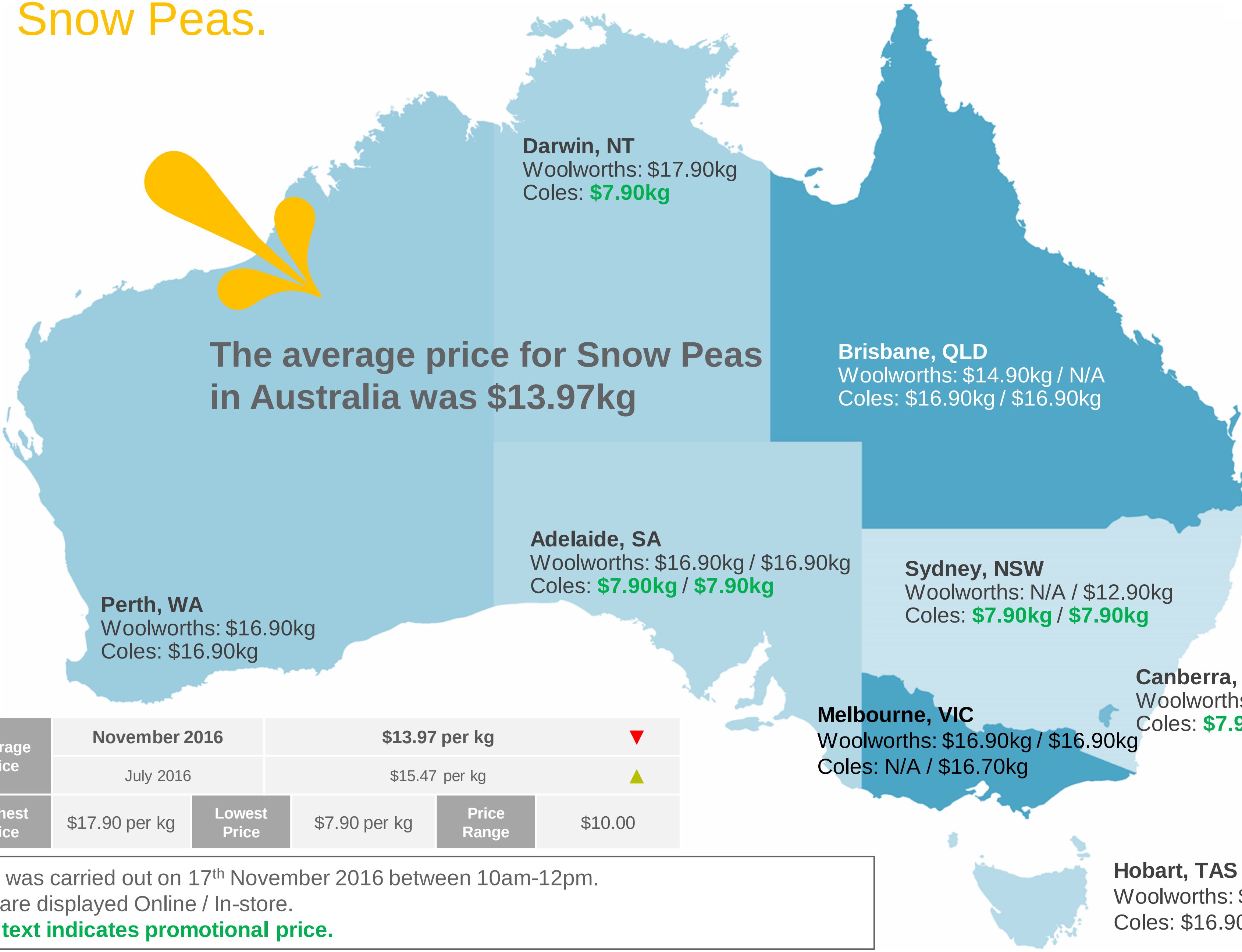
Individual green peas are the most common purchase format. Pre-packaged trays are also popular purchase formats.



Q4b. In what fresh formats do you typically purchase green peas?
Sample Wave 34 N=307, Wave 38 N=304, Wave 42 N=306

Online and In-store Commodity Prices.

Snow Peas.

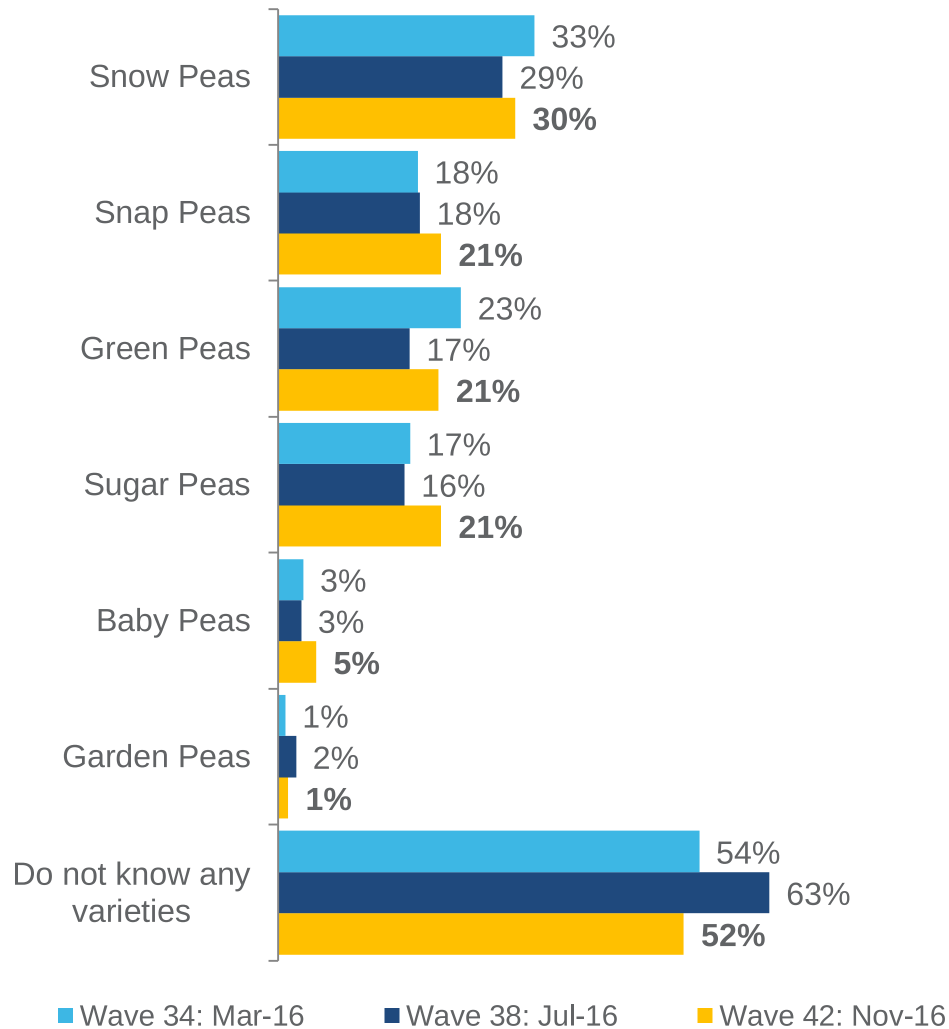


Average Price	**November 2016**		**$13.97 per kg**		▼
	July 2016		$15.47 per kg		▲
Highest Price	$17.90 per kg	**Lowest Price**	$7.90 per kg	**Price Range**	$10.00

Pricing was carried out on 17th November 2016 between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates promotional price.

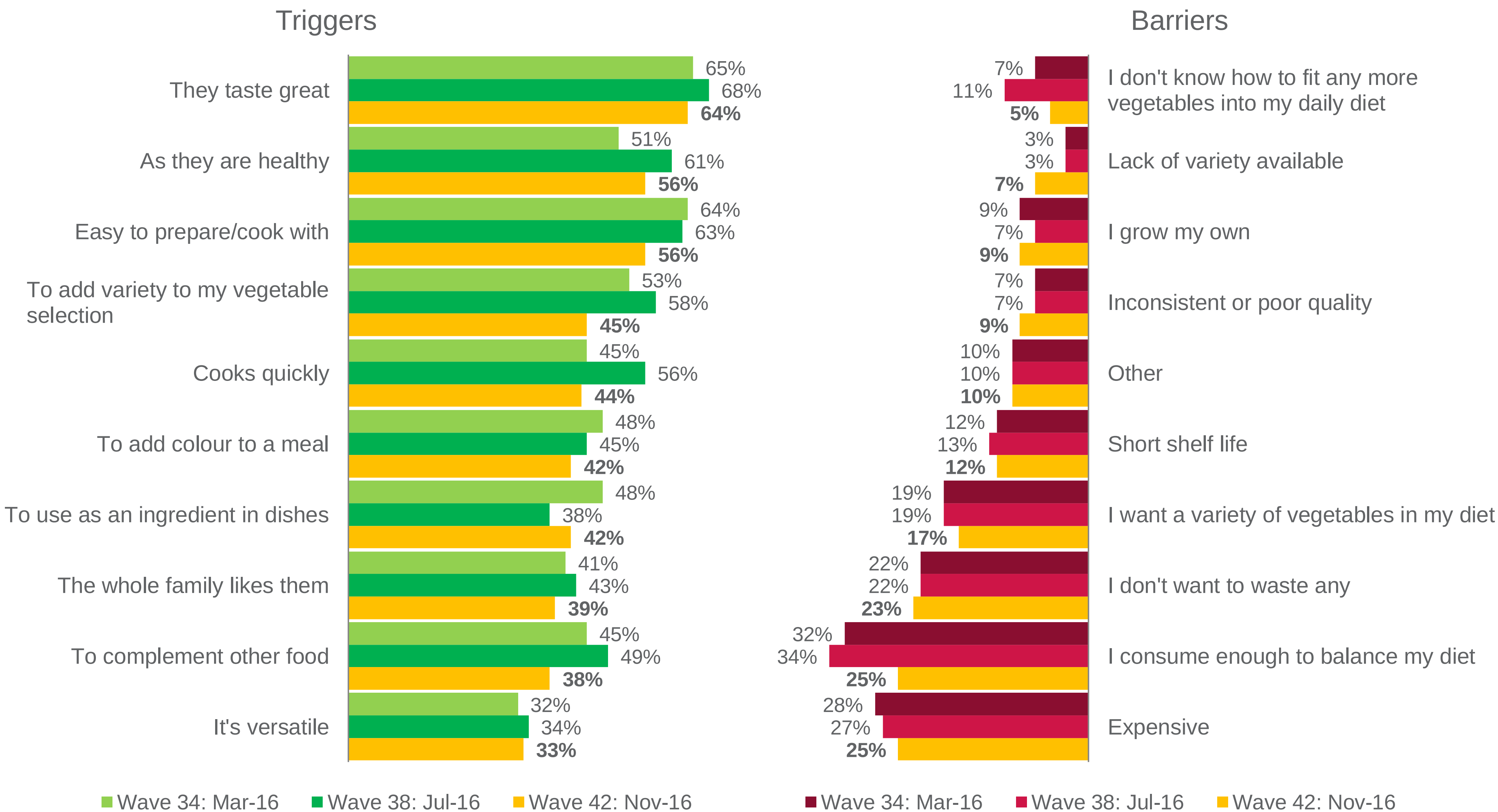
Snow Peas are the most commonly recalled variety.

Approximately one half of consumers are unable to recall a type of pea, which has improved this wave.



Q6a. What types/varieties of <commodity> are you aware of? (unprompted)
Sample Wave 34 N=307, Wave 38 N=304, Wave 42 N=306

Taste and health are the key drivers of purchase. In contrast, the key barriers to purchase are price, already consuming enough and not wanting to waste any.



Q7. Which of the following reasons best describes why you purchase green peas?
Q8. Which reason best describes why you don't buy green peas more often?
Sample Wave 34 N=307, Wave 38 N=304, Wave 42 N=306

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

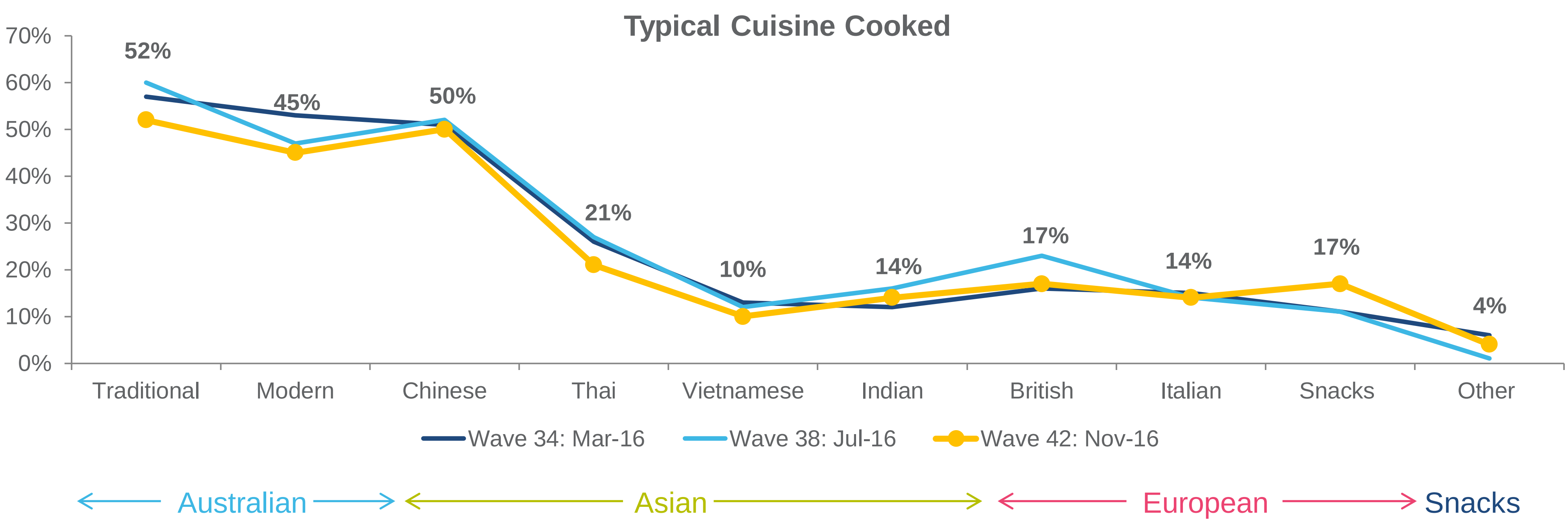
Consumption tends to occur during dinner.

Top 5 Consumption Occasions

	Wave 38	Wave 42
Dinner	74%	72%
Family meals	62%	58%
Quick Meals	47%	53%
Weekday meals	57%	48%
Weekend meals	49%	42%

18% used green peas when cooking a new recipe

▼ 16%, Wave 38



Q10. What cuisines do you cook/consume that use green peas?
Q11. Which of the following occasions do you typically consume/use green peas?
Sample Wave 34 N=307, Wave 38 N=304, Wave 42 N=306

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

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

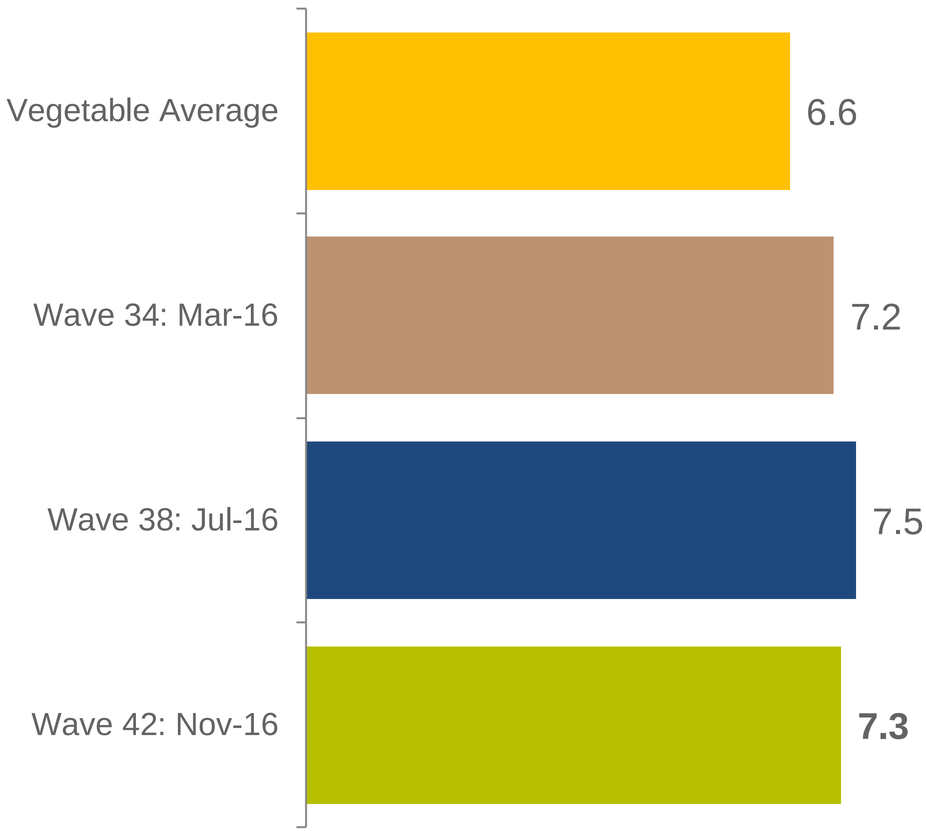
Accompanying Vegetables

- Carrot 64%
- Potato 48%
- Broccoli 38%
- Capsicum 34%
- Cauliflower 32%

Top 10 Cooking Styles			
	Wave 34	Wave 38	**Wave 42**
Stir frying	57%	60%	**61%**
Steaming	53%	52%	**48%**
Boiling	42%	41%	**37%**
Raw	35%	33%	**35%**
Microwave	25%	30%	**26%**
Soup	19%	18%	**15%**
Frying	9%	9%	**12%**
Slow Cooking	15%	13%	**12%**
Sautéing	13%	13%	**11%**
Mashing	5%	7%	**5%**

Q9. How do you typically cook green peas?
Q10a. And when are you serving green peas which of the following do you also serve together with this?
Sample Wave 34 N=307, Wave 38 N=304, Wave 42 N=306

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



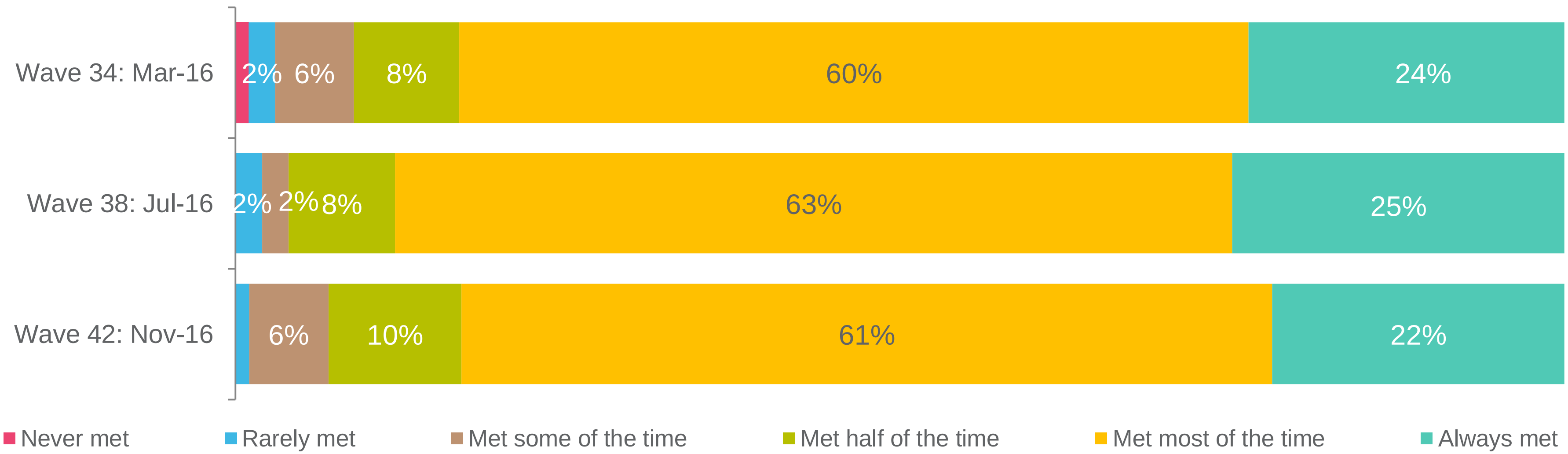
Q14. When purchasing green peas, how important is Provenance to you?
Q15. And when purchasing green peas, how important is that it is grown in Australia?
Sample Wave 34 N=307, Wave 38 N=304, Wave 42 N=306

Consumers expect green peas to remain fresh for over a week once purchased, with these expectations largely being met most of the time.

Expected to stay fresh for **8.9** days

▼ 8.3 days, Wave 34
▼ 8.8 days, Wave 38

Expectations Met



Q12. How long do you expect green peas to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy green peas?
Sample Wave 34 N=307, Wave 38 N=304, Wave 42 N=306

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

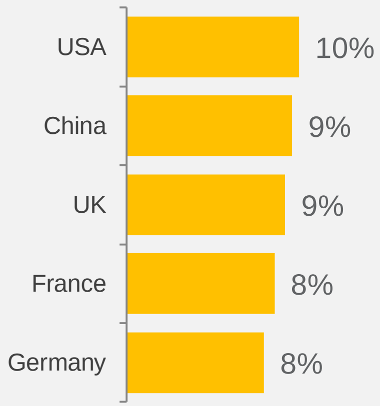
Green Peas Product Launch Trends.

Green Peas Global Launches

August – November 2016

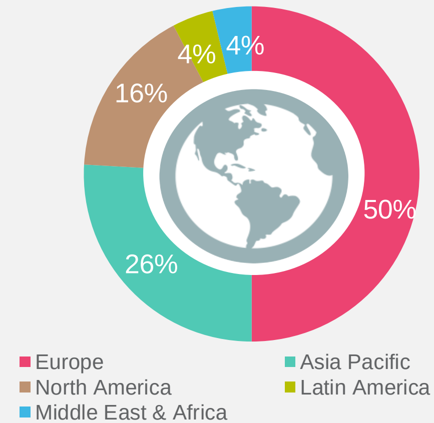
There were 506 green pea products launched globally over the last three months. The majority of launches were from the USA and China. Categories for launches were snacks and processed products. Key packaging for green pea products was flexible formats.

Country

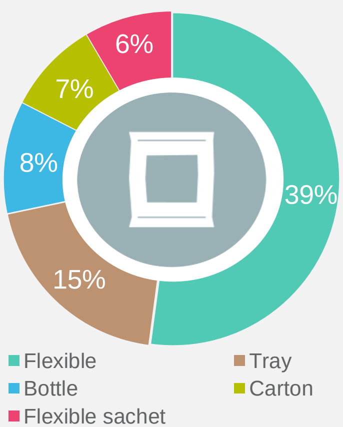


506 Global NPDs

Region



Top Pack Formats



Categories

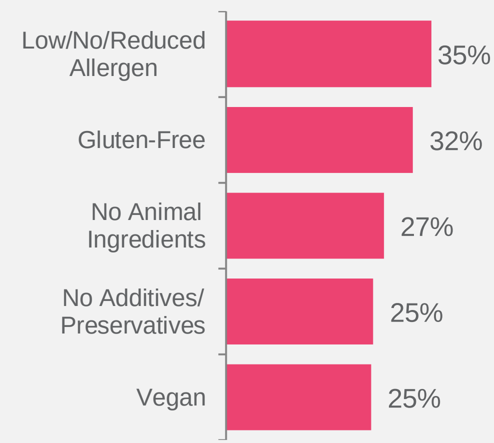
Snacks 22%

Processed Products 19%

Bakery 10%

Meals 9%

Top Claims



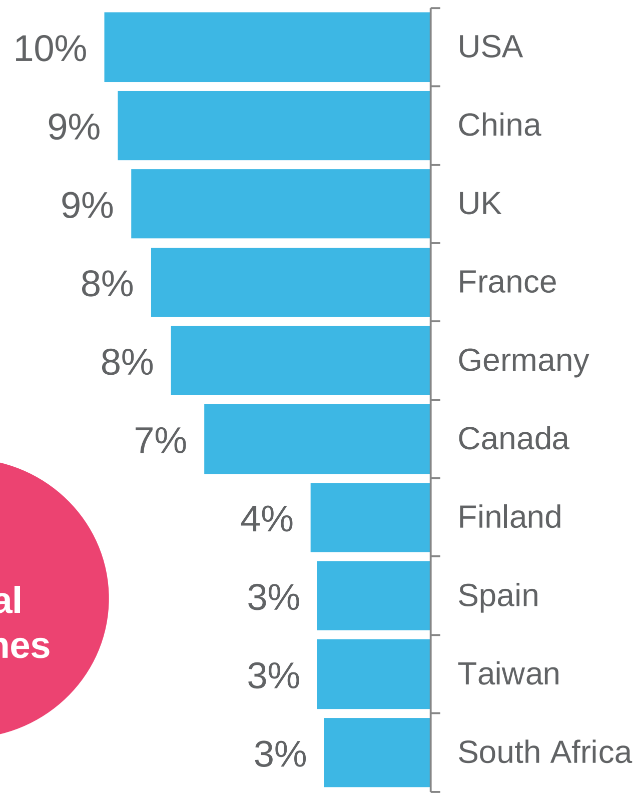
Green Peas Product Launches:
Last 3 Months (August – November 2016)
Summary

- There were 506 launches in the past 3 months globally that contained green peas as an ingredient, slightly higher than the previous wave (482).
- There were 10 products launched in Australia over the past three months.
- Europe (50%) and Asia Pacific (26%) were the key regions for launches.
- Flexible packaging (39%) was the most common format used for products.
- The main categories for launches were snacks (22%), processed products (19%), and bakery items (10%).
- Claims used on products highlighted health; low/no/reduced allergen (35%), gluten free (32%), and no animal ingredients (27%).
- The most innovative product launched included Green Pea Pasta from France. Examples of these can be found in the following pages.

Source: Mintel (2016)

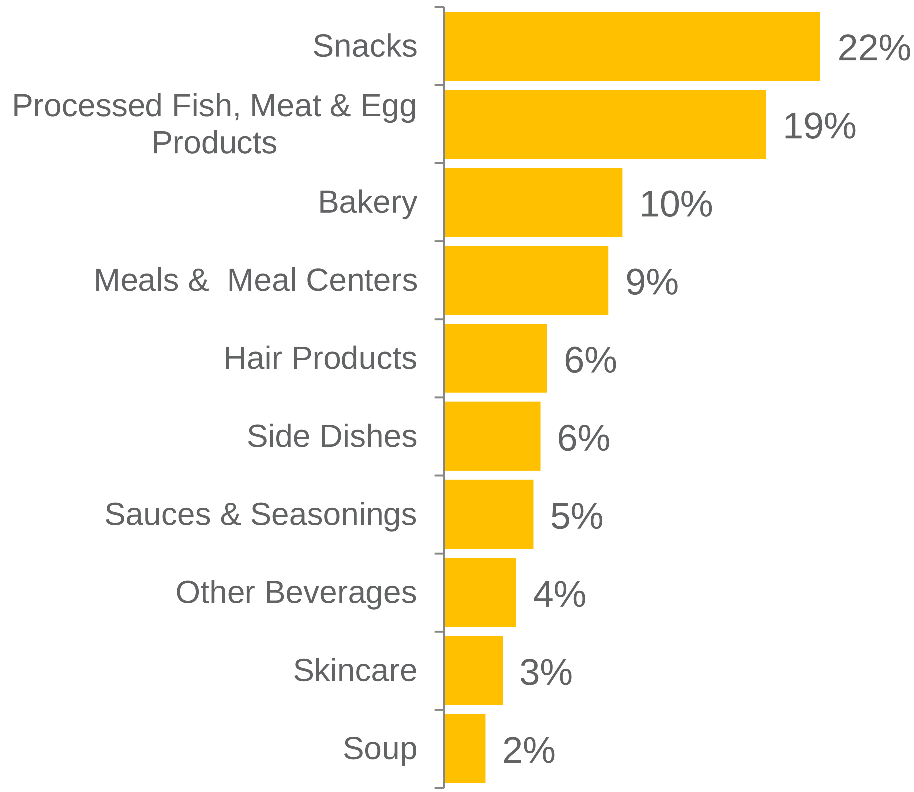
The majority of launches occurred in USA, China and the UK. The key categories for green pea launches are snacks, processed products and bakery items, relatively consistent with the previous waves.

Top Launch Countries



506 Global Launches

Top Launch Categories



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

Pack Formats Used

Global	Flexible	39%
Global	Tray	15%
Global	Bottle	8%
Europe	Flexible	33%
Europe	Tray	25%
Europe	Flexible sachet	8%
Asia Pacific	Flexible	46%
Asia Pacific	Bottle	9%
Asia Pacific	Tray	8%

Top Claims Used

Global	Low/No/Reduced Allergen	35%
Global	Gluten-Free	32%
Global	No Animal Ingredients	27%
Europe	Low/No/Reduced Allergen	38%
Europe	Gluten-Free	32%
Europe	No Animal Ingredients	29%
Asia Pacific	No Additives/Preservatives	21%
Asia Pacific	Vegetarian	15%
Asia Pacific	Social Media	15%

Only regions with n >30 are displayed

Innovative Green Peas Launches:
L3M (August – November 2016)

Betterbody Foods LIVfit Plant Protein (USA)

Betterbody Foods LIVfit Plant Protein is said to be the ultimate blend of organic vegan proteins and helps to build and maintain muscles. This pure and natural protein is free from allergens like dairy, soy, gluten, GMO, any added fillers, sugars, sweeteners artificial colorings and flavourings, making it a perfect option for vegetarians, vegans and people with food sensitivities.

Claims:
No Additives/Preservatives, Kosher, Low/No/Reduced Sugar, Organic, Vegetarian, Botanical/Herbal, Gluten-Free, Cardiovascular (Functional), Digestive (Functional), Immune System (Functional), Low/No/Reduced Allergen, Vegan, No Animal Ingredients, GMO-Free, Weight & Muscle Gain

Axa Protein Muesli with Apple & Coconut (Finland)

Axa Omena & Kookos Proteiinimysli (Protein Muesli with Apple & Coconut) is free from added sugar, contains complete protein from oats and peas, and naturally nourishing super oats from Axa. It contains 40% more protein than regular muesli, and Axa oats are always 100% wholegrain and full of fibre, vitamins and minerals. The product retails in a 650g pack featuring the Lantmännen Green Sprout logo.

Claims:
High/Added Fiber, Low/No/Reduced Sugar, Wholegrain, Ethical - Environmentally Friendly Product, High Protein

Whole Creations Chicken & Pesto Gluten Free Pizza (UK)

Whole Creations Chicken & Pesto Gluten Free Pizza comprises a light and crispy stonebaked pizza base and Mediterranean style tomato sauce, topped with mozzarella cheese, chargrilled chicken and nut-free green pesto. The product is free from hydrogenated fats, artificial colours, preservatives and GMO, and retails in a 350g recyclable pack featuring the Facebook and Twitter logos.

Claims:
No Additives/Preservatives, Gluten-Free, Low/No/Reduced Transfat, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Package, GMO-Free, Social Media

Quorn Vegan Schnitzel (Sweden)

Quorn Vegan Schnitzel (Schnitzel) can be easily prepared in a pan for 15 minutes or in an oven for 21 minutes. This product contains mycoprotein which is said to be very nutritious, low in fat and high in fiber and protein. It retails in a 200g pack containing two units.

Claims:
High/Added Fiber, Low/No/Reduced Fat, Vegan, High Protein, Ease of Use, No Animal Ingredients

Source: Mintel (2016)

Innovative Green Peas Launches:
L3M (August – November 2016)

Coop Vegetardag Taco Filling (Norway)

Coop Vegetardag Taco Fyll (Taco Filling) is a meat substitute made of chopped pea protein to be used in tacos, pizzas and fajitas recipes. It is free from soy and gluten, and contains 0% meat and fish. The sustainable and environmentally friendly product is a source of protein, is suitable for vegetarians and vegans, and it retails in a 300g pack.

Claims:

Vegetarian, Gluten-Free, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Product, Vegan, No Animal Ingredients

Explore Cuisine Organic Chickpea Spaghetti (Canada)

Explore Cuisine Organic Chickpea Spaghetti is made using organic ingredients of the highest quality, including beans, peas, lentils and rice. This easy, quick and colourful product is USDA organic and kosher certified, and contains no GMO or gluten. This vegan product is low in fat, high in protein and fibre, and provides 11g of protein per serving. It retails in a 227g recyclable pack featuring the Facebook and Instagram logos and a recipe suggestion.

Claims:

High/Added Fiber, Kosher, Low/No/Reduced Fat, Organic, Gluten-Free, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Ethical - Human, Ethical - Charity, Vegan, High Protein, Time/Speed, Ease of Use, No Animal Ingredients, GMO-Free, Social Media

Pedon More than Pasta Green Pea Pasta (France)

Pedon More than Pasta Green Pea Pasta is high in protein and fibre, about double than the regular pasta. This gluten and GMO free pasta is low in glycemic index and carbohydrate, and is free from all allergens. The vegan product is kosher certified, cooks in just five minutes, and retails in a recycled and recyclable 249g pack featuring the FSC logo. This product was on display at SIAL 2016 in Paris, France.

Claims:

High/Added Fiber, Kosher, Low/No/Reduced Carb, Low/No/Reduced Glycemic, Gluten-Free, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Package, Vegan, High Protein, Time/Speed, No Animal Ingredients, GMO-Free

Tekmar Green Line Cappuccino Protein Bar (France)

Tekmar Green Line Cappuccino Protein Bar is a cappuccino flavoured snack bar made with 100% plant protein and coated in dark chocolate. This non-GMO and low GI product is enriched with fibre and vitamins including L-carnitine, and retails in a 40g pack. It was on display at SIAL 2016 in Paris, France.

Claims:

High/Added Fiber, Vitamin/Mineral Fortified, Low/No/Reduced Glycemic, GMO-Free

Source: Mintel (2016)

Innovative Green Peas Launches:
L3M (August – November 2016)

Hak Pea Mix for Soup (Netherlands)

Hak Erwtenmix voor Soep (Pea Mix for Soup) is a source of protein. The mix is made from green and yellow peas, includes herbs and spices, and retails in a 250g pack with a 21g pack of seasoning, and featuring cooking instructions.

Claims:
N/A

Daiya Dairy & Soy Free Peach Flavored Greek Style Yogurt (USA)

Daiya Dairy & Soy Free Peach Flavored Greek Style Yogurt is said to be delicious, rich and creamy, and contains sweet peach sun ripened to perfection. This kosher product contains probiotics, 8g of protein and 3g of fiber per serving, and is an excellent source of calcium and vitamin B12. It is free from dairy, soy and gluten, is suitable for vegans and retails in a 5.3-oz. pack.

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

Gold&Green Pulled Oats Nude Pulled Oats (Finland)

Gold&Green Pulled Oats Nude Nyhtökaura (Nude Pulled Oats) are described as an oat and bean based protein food that is 100% animal free, and free from soy or wheat. It contains 78g of perfect protein per pack, and is said to be an easy, convenient and high-quality vegetarian protein. This product is free from E-numbers, and it retails in a 250g pack featuring a recipe idea.

Claims:
No Additives/Preservatives, Vegetarian, Low/No/Reduced Allergen, Ease of Use, No Animal Ingredients

Peeled Snacks Peas Please Sea Salt Organic Pea Snack (USA)

Peeled Snacks Peas Please Sea Salt Organic Pea Snack consists of baked crunchy peas. The kosher certified product is made with real, simple ingredients such as organic whole peas and wholegrain brown rice, and is free from gluten and GMOs. This snack provides three and a half vegetable servings per bag and 5g of protein, 4g of fiber, and 15% daily value of iron per serving.

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

Source: Mintel (2016)

Australian Green Peas Launches:
L3M (August – November 2016)

Greco's Ultrablast Cacao Superfood Breakfast

Greco's Ultrablast Cacao Superfood Breakfast is made with 100% natural ingredients including 10 vegetables, 10 fruits, dairy, protein, fibre and 3x organic cereal grains. It has a four star health rating and said to give 8% of your day's dairy intake, plus a dollop of natural fibre and protein, along with twice the recommended number of super greens and fruits. It is free from gluten and has low glycemic index.

Claims:
All Natural Product, Organic, Low/No/Reduced Glycemic, Gluten-Free, Low/No/Reduced Allergen, On-the-Go, Ease of Use

Syndian Natural Food Products 100% Natural Vegie and Lentil Burgers

Syndian Natural Food Products 100% Natural Vegie and Lentil Burgers have been repackaged in a newly designed pack. These 100% natural, gluten free, vegan friendly, dairy free, yeast free and non genetically modified burgers contain no artificial colours or flavours or preservatives. This product is kosher and halal certified and is described as a healthy alternative for quick meals and features less than 120 calories per serve. It retails in a 400g pack containing four units.

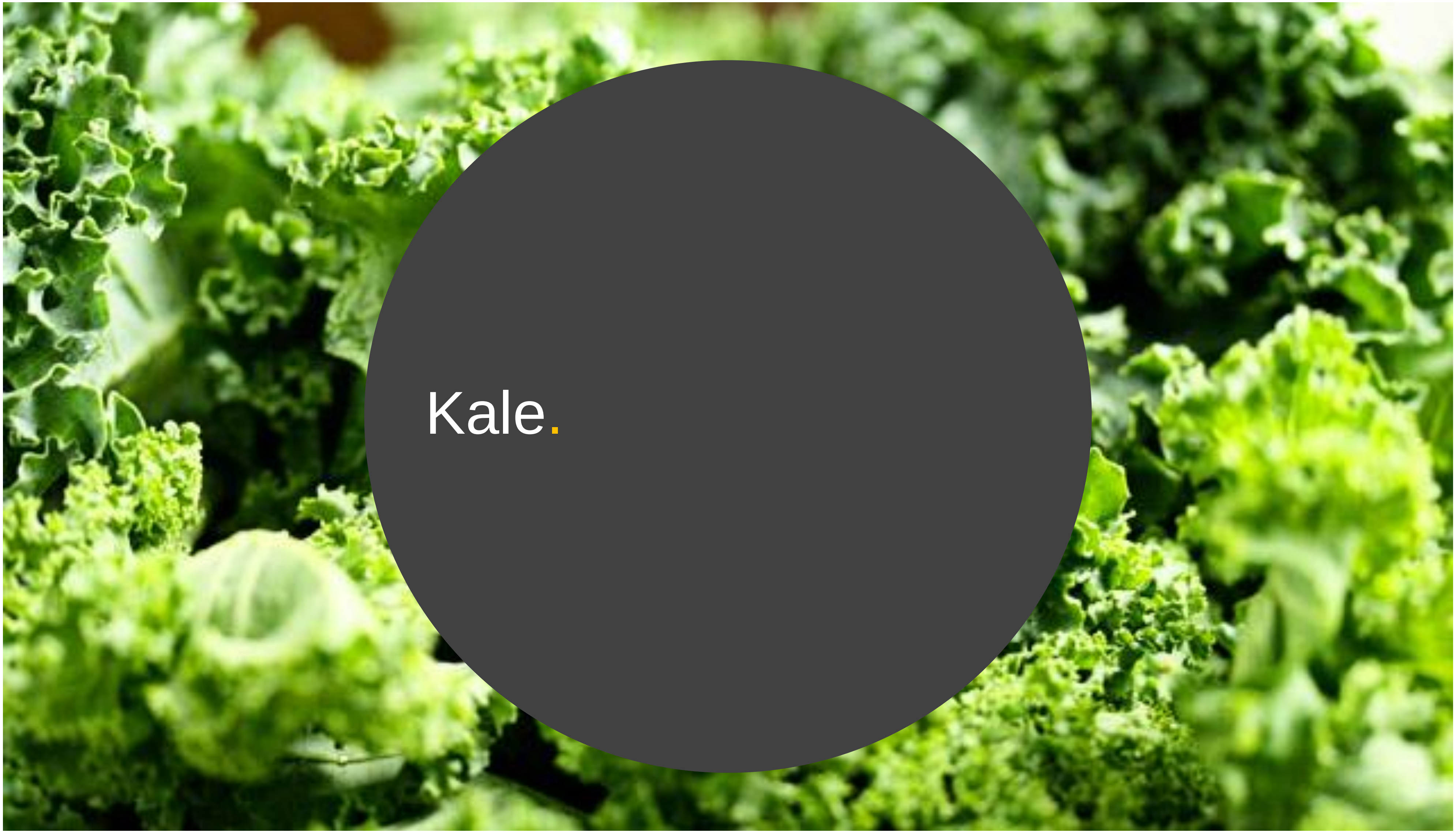
Claims:
No Additives/Preservatives, All Natural Product, Low/No/Reduced Calorie, Kosher, Halal, Gluten-Free, Low/No/Reduced Allergen, Vegan, Time/Speed, No Animal Ingredients, GMO-Free

Maggi Beef Stroganoff Recipe Base

Maggi Beef Stroganoff Recipe Base has been relaunched with new ingredients in a newly designed 41g pack, featuring the Facebook logo and a QR code. This product is gluten free, and can be prepared by simply adding beef, onion, mushrooms, sour cream and pasta. It is awarded four out of five health star rating.

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

Source: Mintel (2016)



Kale.

Average consumption of kale has declined this wave, whereas purchase frequency has remained stable.

Kale is typically purchased from mainstream retailers. There has been a slow decline in purchase from specialist vegetable retailers and markets over the last three waves.

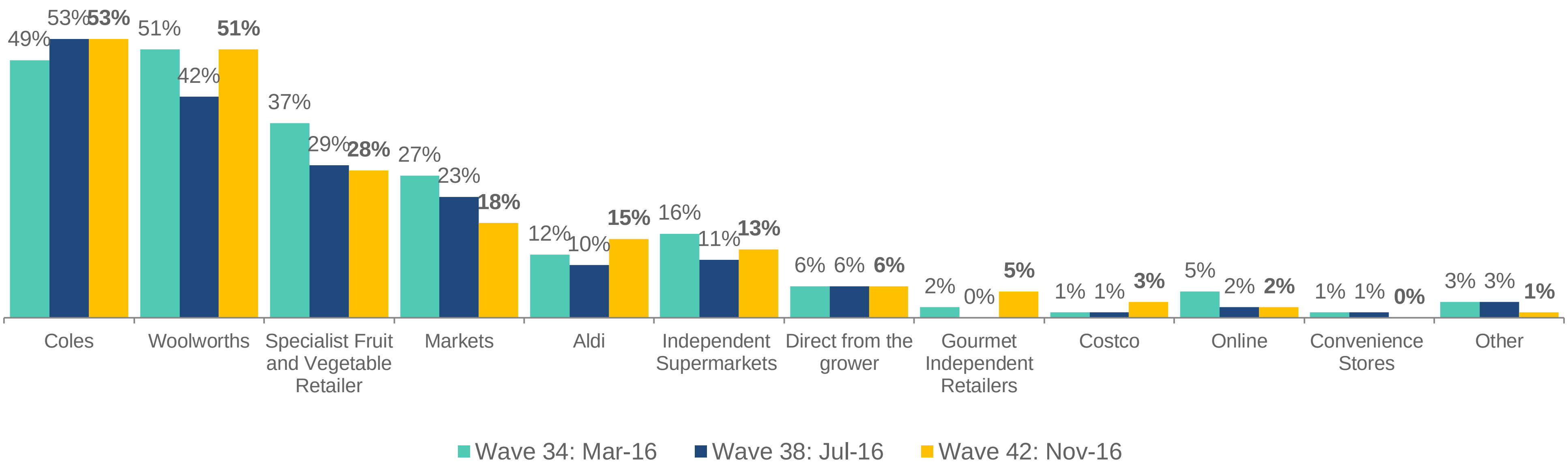
Average Purchase **4.0** times per month

▲ 4.2 times, Wave 34
▼ 3.9 times, Wave 38

Average Consumption **8.3** times per month

▲ 9.0 times, Wave 34
▲ 9.1 times, Wave 38

Purchase Channels



Q1. On average, how often do you purchase kale?
Q2. On average, how often do you consume kale?
Q5. From which of the following channels do you typically purchase kale?
Sample Wave 34 N=202, Wave 38 N=202, Wave 42 N=202

Horticulture Innovation Australia

colmar brunton.

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

Average Spend and Price Sensitivity.

Average weight of purchase

The average consumer typically purchases **700g** of kale, a slight increase from the previous wave.

— 700g, Wave 34
▼ 600g, Wave 38

Recalled last spend

Recalled last spend on kale is **$3.80**, remaining consistent with Wave 38.

▲ $4.20, Wave 34
— $3.80, Wave 38

Value for money

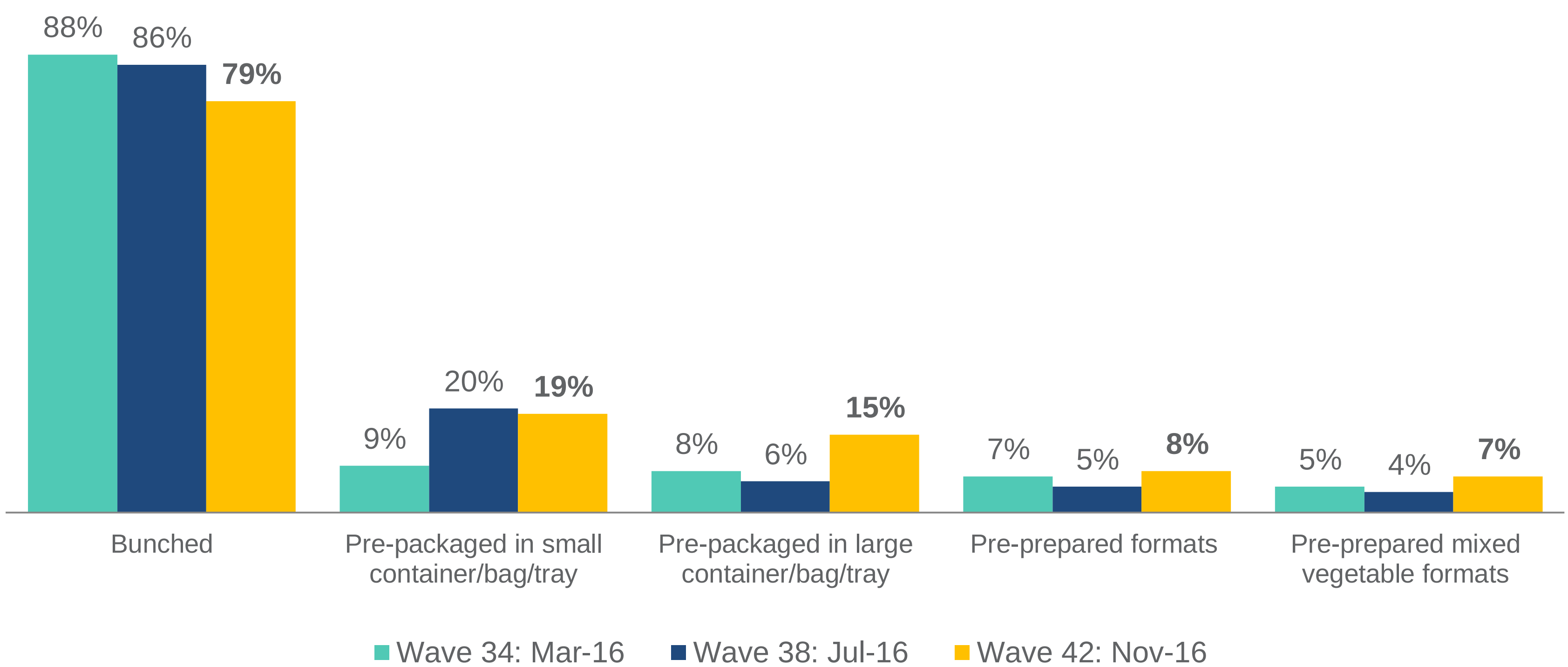
Consumers perceived kale to be fair value for money **(5.9/10)**, which is consistent with the previous wave.

▲ 6.0/10, Wave 34
— 5.9/10, Wave 38

Q3. How much kale do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 34 N=202, Wave 38 N=202, Wave 42 N=202

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

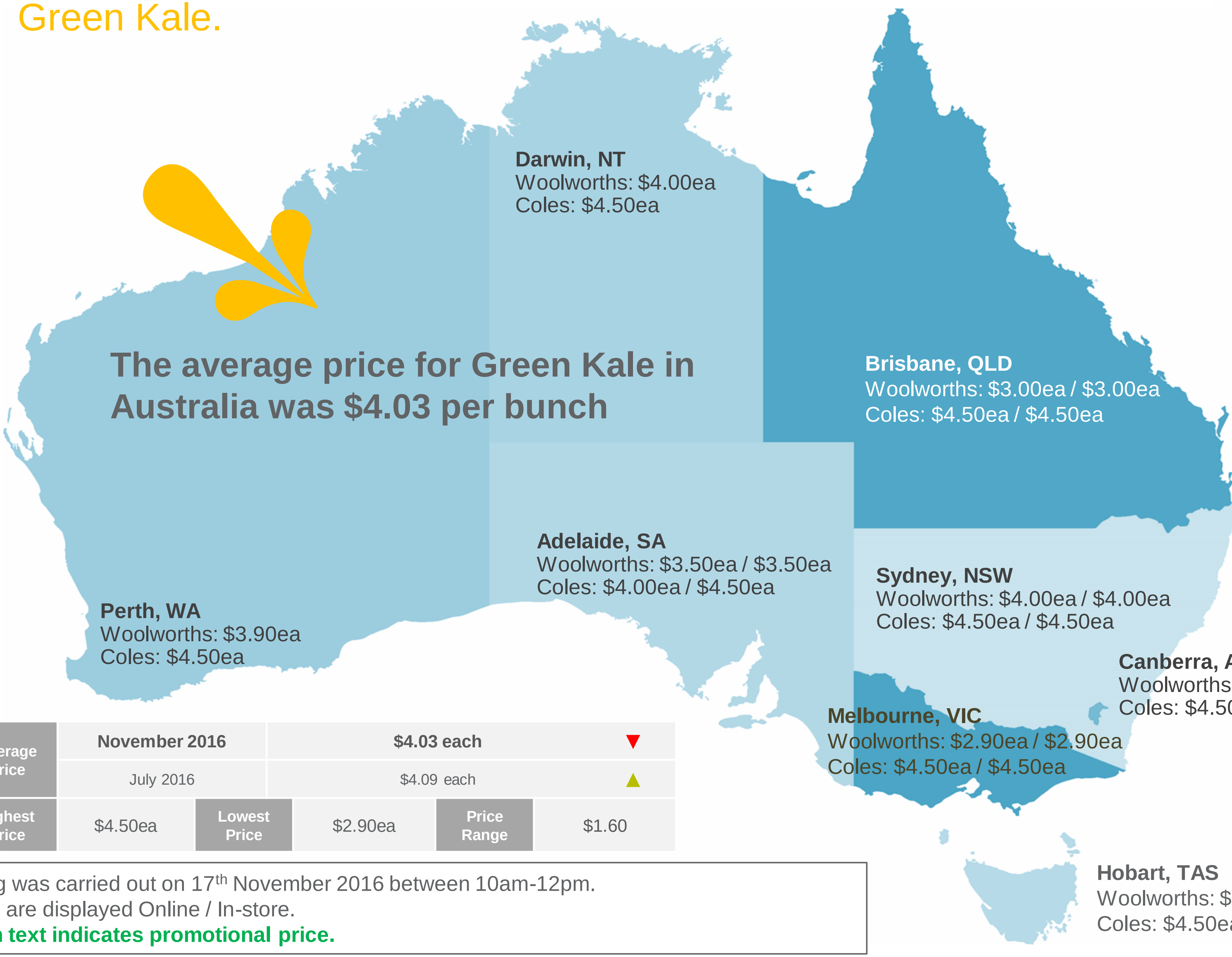
Bunched kale is the most common purchase format, consistent with previous waves. This wave sees a noticeable increase in purchase of kale in pre-packaged large bags.



Q4b. In what fresh formats do you typically purchase kale?
Sample Wave 34 N=202, Wave 38 N=202, Wave 42 N=202

Online and In-store Commodity Prices.

Green Kale.



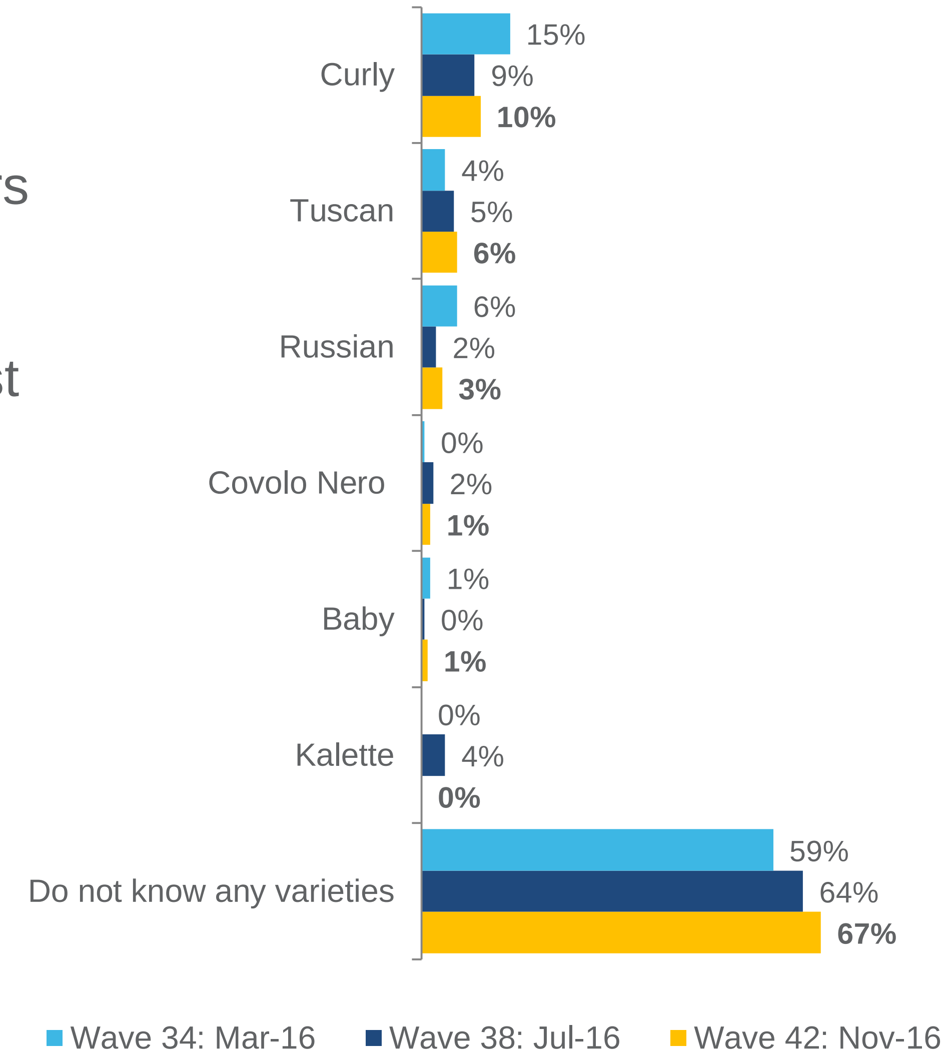
The average price for Green Kale in Australia was $4.03 per bunch

Average Price	**November 2016**		**$4.03 each** ▼		
	July 2016		$4.09 each ▲		
Highest Price	$4.50ea	Lowest Price	$2.90ea	Price Range	$1.60

Pricing was carried out on 17th November 2016 between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates promotional price.

Awareness of types of kale has continued to decline this wave with approximately two thirds of consumers still unable to recall a variety.

Curly, Green and Tuscan are the most recalled types.

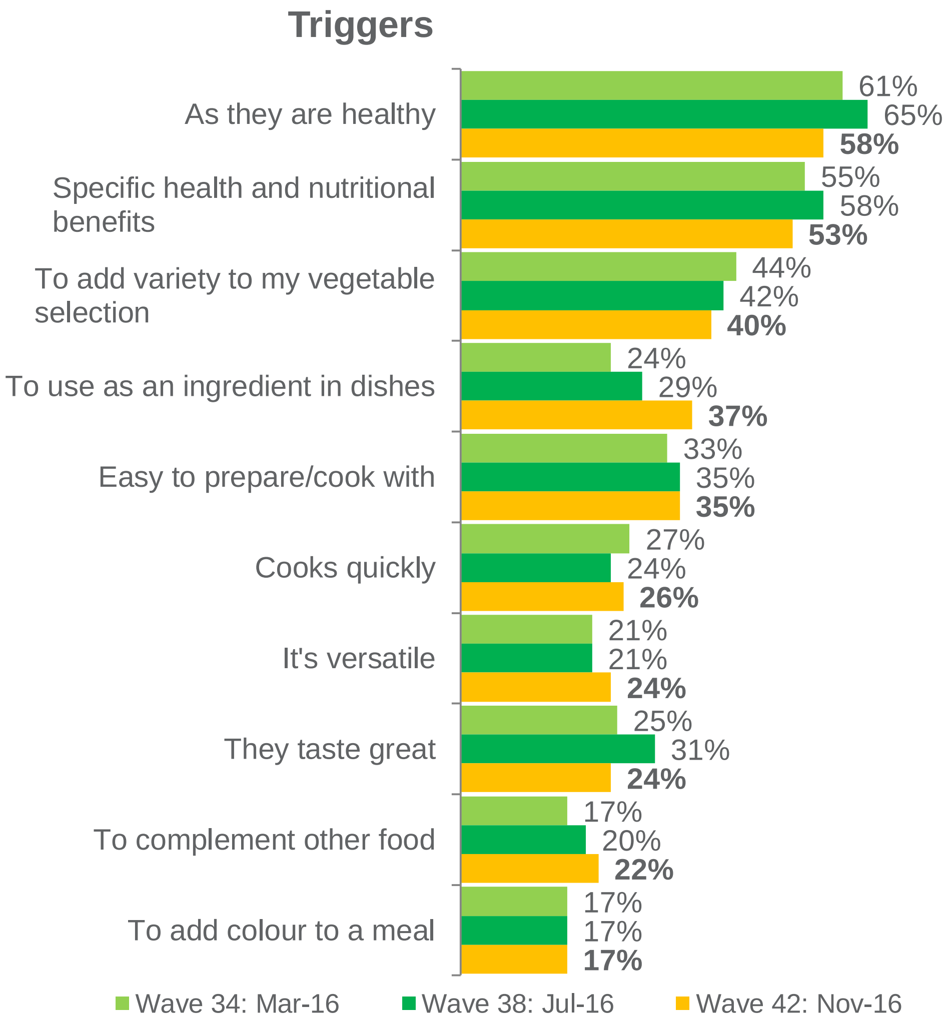


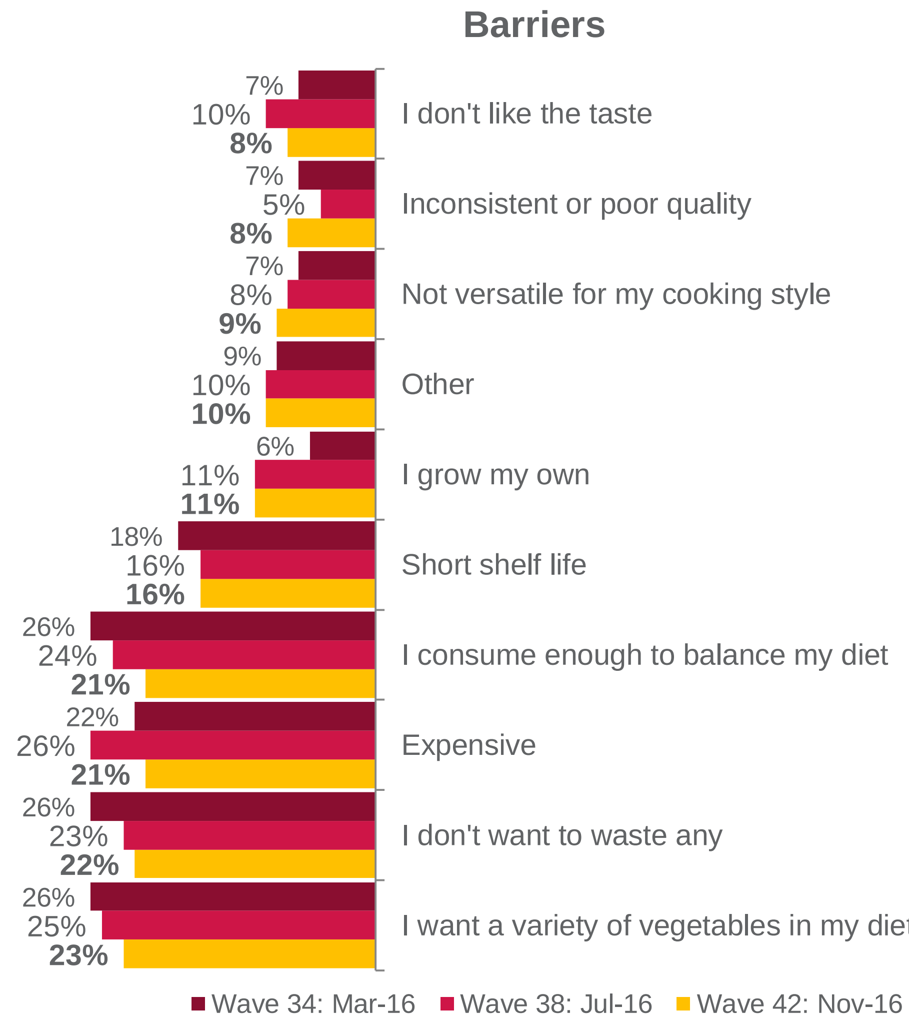
Green 9% **Red 6%** **Purple 5%** **Black 2%**

Colour recall for kale types

Q6a. What varieties of kale are you aware of? (unprompted)
Sample Wave 34 N=202, Wave 38 N=202, Wave 42 N=202

The key drivers of purchase for kale are health related due to its specific health and nutritional benefits. In contrast, wanting a variety of vegetables and not wanting to waste any are the key barriers to purchase.





Q7. Which of the following reasons best describes why you purchase kale?
Q8. Which reason best describes why you don't buy kale more often?
Sample Wave 34 N=202, Wave 38 N=202, Wave 42 N=202

Horticulture Innovation Australia

colmar brunton.

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

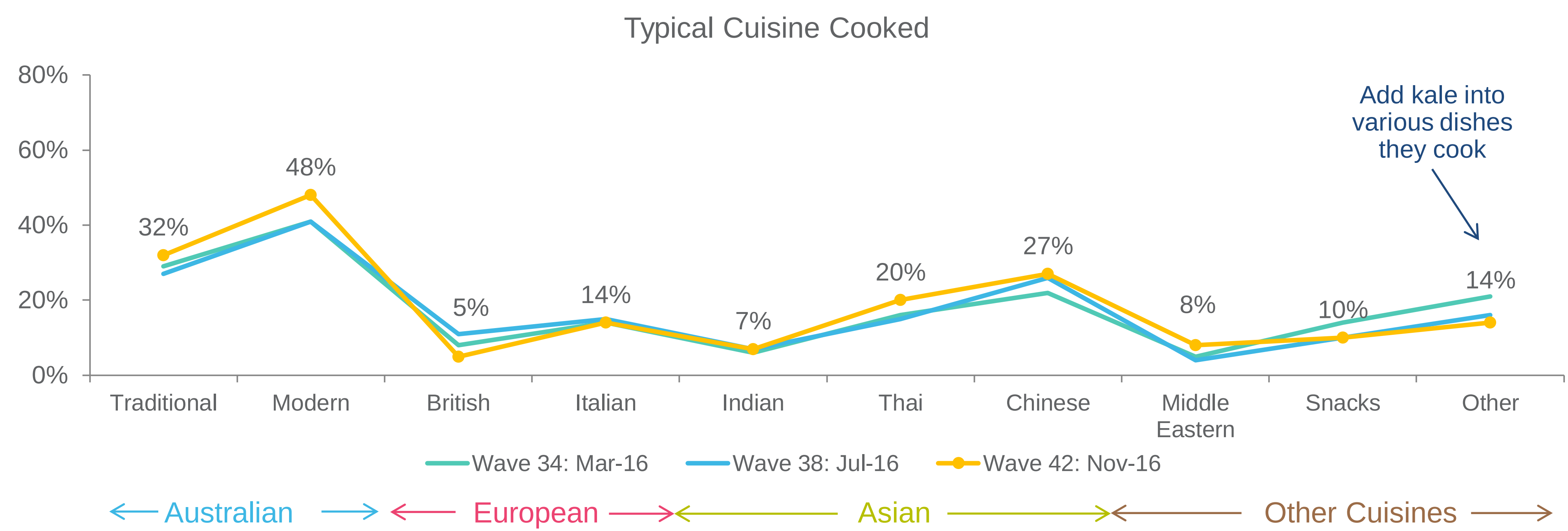
Meal occasions tend to occur during dinner and family meals.

Top 5 Consumption Occasions

	Wave 38	Wave 42
Dinner	55%	**53%**
Family meals	43%	**41%**
Quick Meals	33%	**34%**
Weekday meals	30%	**30%**
Lunch	23%	**27%**

17% used kale when cooking a new recipe

▲ 20%, Wave 38



Q10. What cuisines do you cook/consume that use kale?
Q11. Which of the following occasions do you typically consume/use kale?
Sample Wave 34 N=202, Wave 38 N=202, Wave 42 N=202

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

Consumers prefer to use kale mainly with carrots, onions and potatoes. Kale is generally stir fried, steamed, or eaten raw. There has been an increase of kale being sautéed over the last three waves.

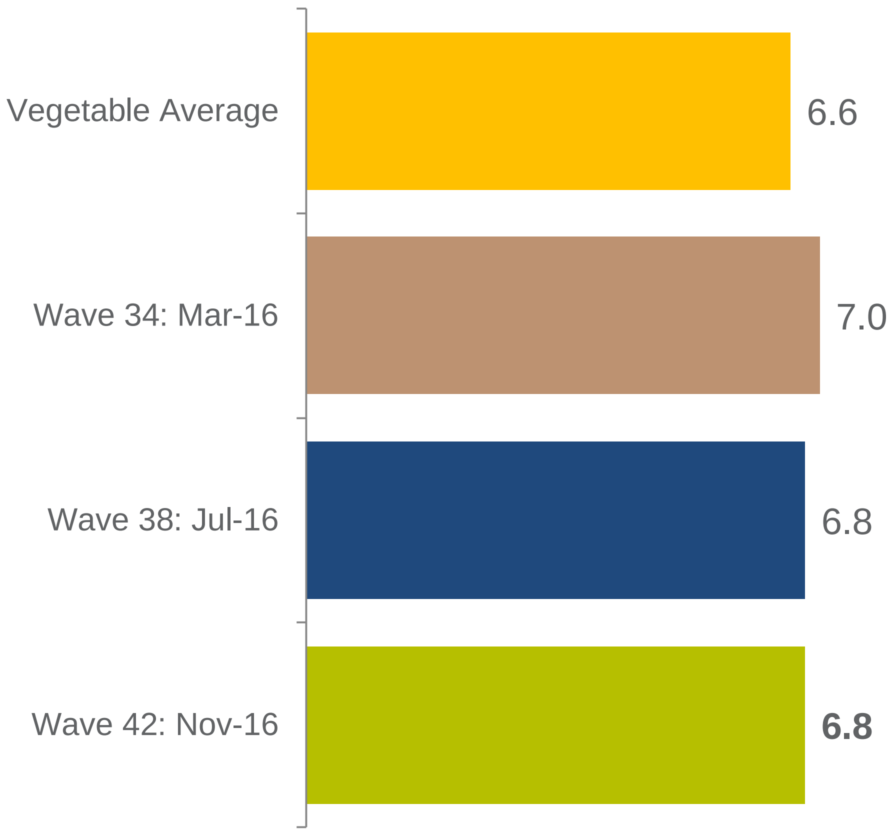
Accompanying Vegetables

Carrot	42%
Onion	32%
Potato	27%
Capsicum	26%
Tomato	23%

Top 10 Cooking Styles			
	Wave 34	Wave 38	Wave 42
Stir frying	36%	41%	**45%**
Steaming	40%	36%	**37%**
Raw	36%	29%	**34%**
Sautéing	16%	19%	**23%**
Soup	18%	25%	**19%**
Frying	9%	11%	**14%**
Boiling	16%	17%	**14%**
Other	14%	13%	**12%**
Baking	10%	9%	**11%**
Roasting	13%	8%	**10%**

Q9. How do you typically cook kale?
Q10a. And when are you serving kale which of the following do you also serve together with this?
Sample Wave 34 N=202, Wave 38 N=202, Wave 42 N=202

The importance of kale provenance remains consistent with the previous wave. Knowing that kale is grown in Australia remains highly important information for consumers.



8.1 –

Wave 38: **8.1**

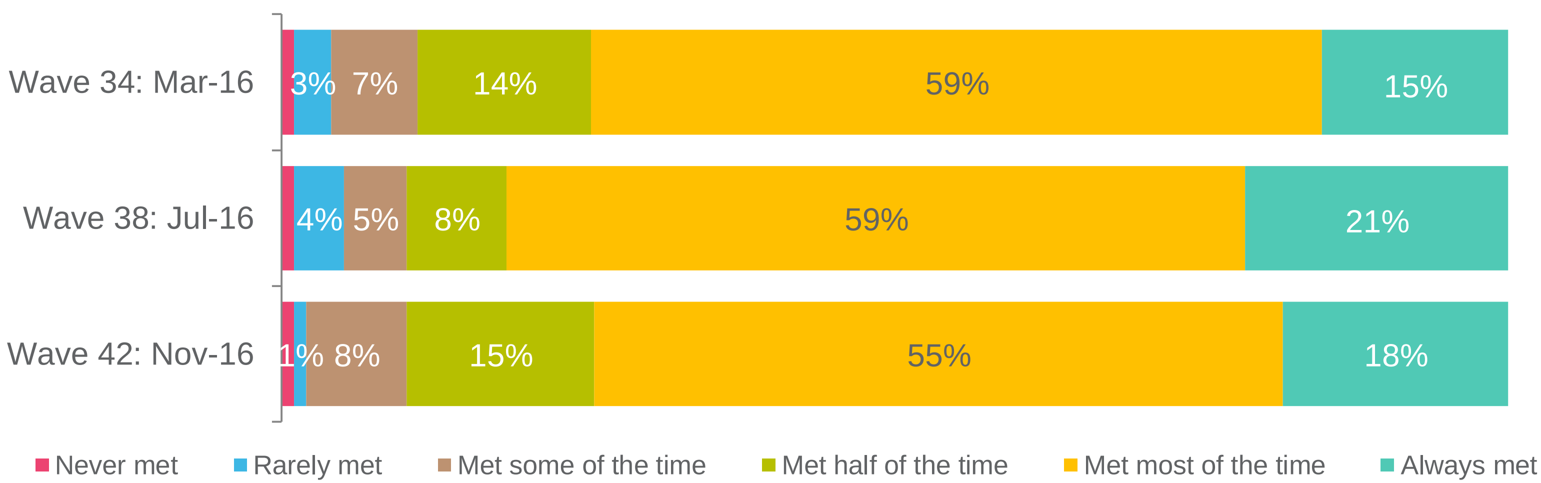
Q14. When purchasing kale, how important is Provenance to you?
Q15. And when purchasing Kale, how important is that it is grown in Australia?
Sample Wave 34 N=202, Wave 38 N=202, Wave 42 N=202

Consumers expect kale to remain fresh for approximately a week once purchased. This wave sees a decline in expectations of freshness being met at least most of the time.

Expected to stay fresh for **6.8** days

▲ 7.0 days, Wave 34
▲ 6.9 days, Wave 38

Expectations Met



Q12. How long do you expect kale to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy kale?
Sample Wave 34 N=202, Wave 38 N=202, Wave 42 N=202

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

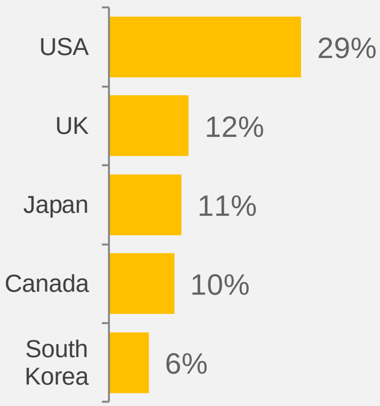
Kale Product Launch Trends.

Kale Global Launches

August – November 2016

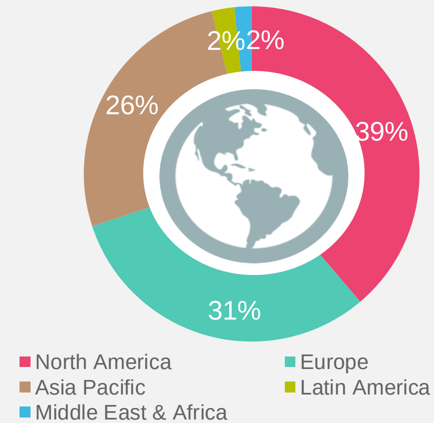
There were 183 kale products launched globally over the last three months. The majority of launches were in USA and the UK. Categories for launches were juice drinks and snacks. Key packaging for kale products were in flexible packaging and bottles.

Country

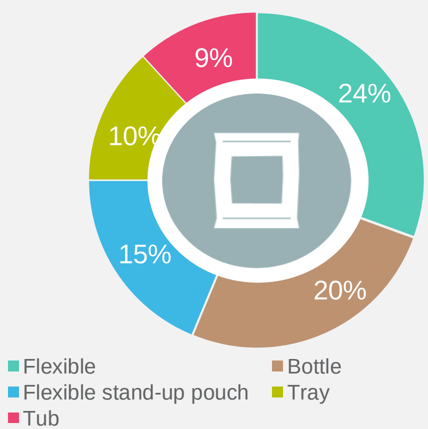


183 Global NPDs

Region



Top Pack Formats



Categories

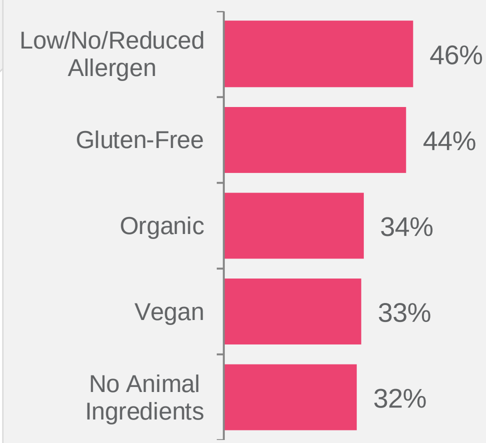
Juice Drinks 26%

Snacks 19%

Meals 17%

Fruits & Vegetables 7%

Top Claims



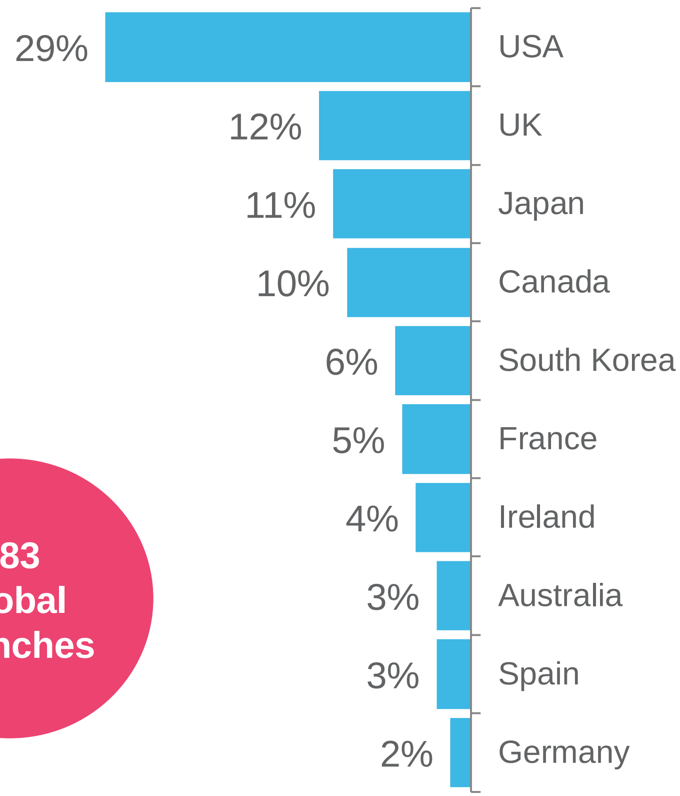
Kale Product Launches:
Last 3 Months (August – November 2016)
Summary

- There were 183 launches in the past 3 months globally that contained kale as an ingredient.
- There were 5 products launched in Australia over the past three months.
- North America (39%) and Europe (31%) were the key regions for launches.
- Flexible packaging (24%) and bottles (20%) were the most common formats used for products.
- The main categories for launches were juice drinks (26%), snacks (19%) and meals (17%).
- Claims used on products highlighted health; low/no/reduced allergen (46%) and gluten free (44%).
- The most innovative product launched were Kale & Spirulina Activated Crackers from the UK. More examples can be found in the following pages.

Source: Mintel (2016)

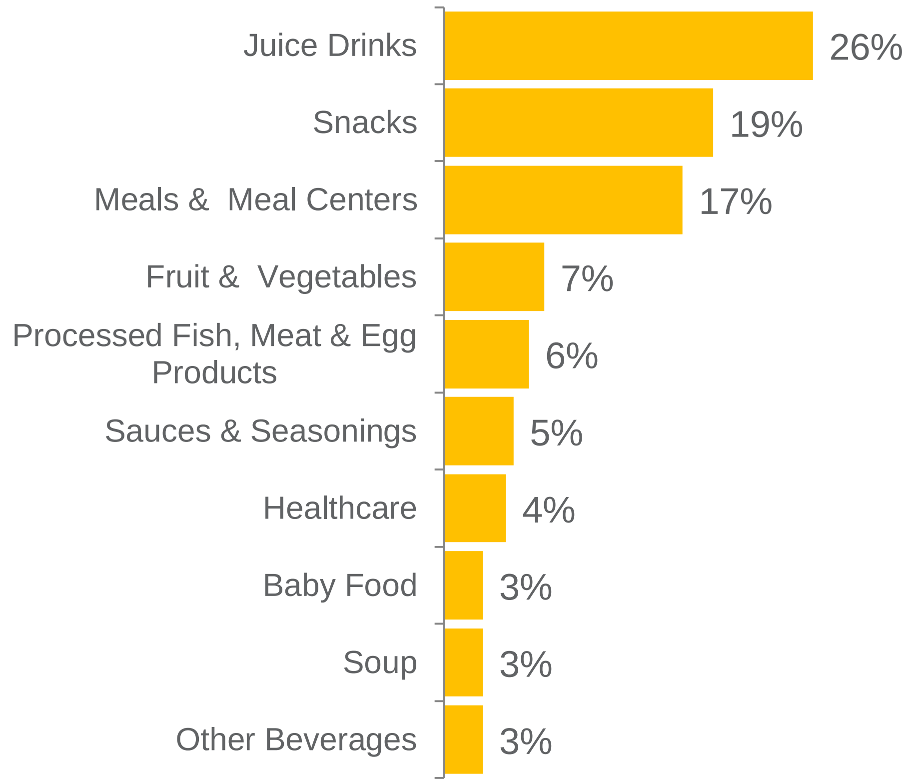
The majority of kale launches occurred in USA and the UK. The key categories for kale launches are juice drinks, snacks, and meals & meal centers, relatively consistent with the previous wave.

Top Launch Countries



183 Global Launches

Top Launch Categories



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

Pack Formats Used

Region	Pack format	%
Global	Flexible	24%
Global	Bottle	20%
Global	Flexible stand-up pouch	15%
North America	Flexible	31%
North America	Bottle	25%
North America	Tub	11%
Europe	Flexible	21%
Europe	Tray	19%
Europe	Flexible stand-up pouch	18%

Top Claims Used

Region	Claim	%
Global	Low/No/Reduced Allergen	46%
Global	Gluten-Free	44%
Global	Organic	34%
North America	Low/No/Reduced Allergen	61%
North America	Gluten-Free	58%
North America	Organic	52%
Europe	Low/No/Reduced Allergen	47%
Europe	Gluten-Free	46%
Europe	Vegan	46%

Only regions with n >30 are displayed

Innovative Kale Launches:
L3M (August – November 2016)

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

The Pulp & Press Juice Co. Hulk Cold Pressed Fruit & Vegetable Juice is a raw, fresh, organic juice with pineapple, cucumber, kale and avocado. 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

Eat! 2.0 Lemon Herb Chicken Meal (USA)

Eat! 2.0 Lemon Herb Chicken Meal contains white meat chicken, bell peppers, kale and brown rice in a lemon herb sauce. The microwaveable meal is minimally processed; contains 13g protein; is free from preservatives, artificial flavors and colors. The USDA inspected product is made with 100% natural chicken, and retails in a 9.5-oz. pack featuring the Facebook and Twitter logos.

Claims:
No Additives/Preservatives, Microwaveable, Social Media

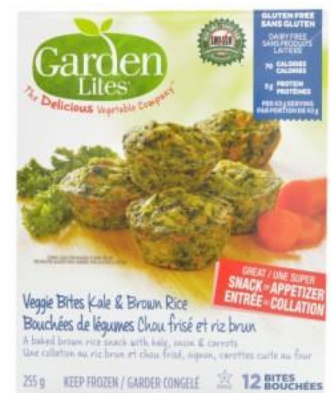
Veganz Beetroot-Lime Kale Chips (France)

Veganz Kale Chips Rote Bete-Limette (Beetroot-Lime Kale Chips) comprises organic dried kale leaves with an olive oil, beetroot and lime seasoning. This raw, vegan product is a source of protein, contains no gluten and retails in a 30g pack featuring the EU Green Leaf, BIO and Facebook logos and the V-Label seal from the European Vegetarian Union. This product was on display at SIAL 2016 in Paris, France.

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

Garden Lites Veggie Bites Kale & Brown Rice (Canada)

Garden Lites Veggie Bites Kale & Brown Rice are described as a baked brown rice snack with kale, onions and carrots. These microwaveable bites are free from gluten, dairy, nuts and GMO and are said to be a great snack or appetizer. The kosher certified product provides 3g of protein and 70 calories per 43g serving and retails in a 255g recycled pack containing 12 units, and bearing the Facebook and Twitter logos. The bites provide 2 PointsPlus according to the Weight Watchers scale.



Claims:
Kosher, Microwaveable, Gluten-Free, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Package, GMO-Free, Slimming, Social Media

Source: Mintel (2016)

Innovative Kale Launches:
L3M (August – November 2016)

Bionsan Lentils, Kale and Nori Seaweed (Spains)

Bionsan Lentejas, Col Kale y Alga Nori (Lentils, Kale and Nori Seaweed) is rich in iron, calcium and vitamins A, C and K and is prepared with extra virgin olive oil. The organic certified ready meal is suitable for vegans and retails in a 355g pack with a bisphenol A free lid, featuring the EU Green Leaf logo.

Claims:
Organic, Vegan, Ease of Use, No Animal Ingredients

Bilinski's Organic Kale Balsamic Chicken Sausage (USA)

Bilinski's Organic Kale Balsamic Chicken Sausage has been repackaged. The USDA certified product is made from chickens raised without the use of antibiotics. The fully cooked sausages do not contain casing, are suitable for freezing, and just need to be heated and served. The product is free from gluten, and retails in a 12-oz. pack bearing the USDA Organic, Facebook, Twitter, Pinterest, and Instagram logos as well as heating instructions.

Claims:
Organic, Gluten-Free, Low/No/Reduced Allergen, Ease of Use, Social Media

Soupologie Spinach & Kale Soup with Garlic (UK)

Soupologie Spinach & Kale Soup with Garlic is said to be source of folate, vitamin A and C, protein and fibre, This soup is claimed to help to keep one's skin glowing since it is packed with vitamin A which supports the maintenance of normal skin. This plant based product is free from dairy, gluten and added sugar, and provides two of five a day per serving.

Claims:
Low/No/Reduced Sugar, Microwaveable, Gluten-Free, Beauty Benefits, Low/No/Reduced Allergen, Vegan, No Animal Ingredients, Social Media

M&S Cook Menu Cod Mornay with a Parsley Crumb (UK)

M&S Cook Menu Cod Mornay with a Parsley Crumb is comprised of Icelandic cod fillets with cheese sauce, kale and cherry tomatoes, topped with a parsley and lemon crumb. It is a source of protein, which is needed to maintain growth in muscles. The ready-to-cook product cooks in 25 minutes and retails in a 320g FSC certified and partly recyclable pack, featuring a 20% introductory offer and the Eat Well and Forever Fish logos.

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

Source: Mintel (2016)

Innovative Kale Launches:
L3M (August – November 2016)

Saf Raw Miso & Cumin Kale Crisps (UK)

Saf Raw Miso & Cumin Kale Crisps are now available. These raw snacks are made at 46 degrees Celsius to preserve vital nutrients. This gluten and dairy free product is suitable for vegans, and is high in protein and fibre. It retails in a 40g resealable pack and was on display at the Natural & Organic Products Europe 2016, London.

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

Saf Raw Kale & Spirulina Activated Crackers (UK)

Saf Raw Kale & Spirulina Activated Crackers are high in fibre and free from gluten, dairy and soy. The raw crackers are suitable for vegans, and have been made at 46°C. This product retails in a 50g pack containing two servings and was on display at the Speciality & Fine Food Fair 2016 in Olympia, London.

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

Ikea Vegetable Balls (Norway)

Ikea Vegetable Balls are now available. The ready-made product can be heated in the microwave, and retails in a 1000g pack.

Claims:
Microwaveable, Ease of Use

Skin Food Bitter Green Deep Cleansing Gel (South Korea)

Skin Food Bitter Green Deep Cleansing Gel is a low-irritating gel type cleanser that is said to purify and deep cleanse impurities and soothe skin with its watery gel texture, and contains bitter green-5 complex of wheat sprout, kale, celery, cabbage, and broccoli. The product is also said to deliver an anti-dust action, and retails in a 200ml pack.

Claims:
Botanical/Herbal, Cleansing*

Source: Mintel (2016)

Australian Kale Launches:
L3M (August – November 2016)

Rafferty's Garden Vegetable Risotto with Prebiotic Fibre Happy Tummies

Rafferty's Garden Vegetable Risotto with Prebiotic Fibre Happy Tummies is specially designed for babies over eight months old. This yummy, premium, mashed baby food provides a natural source of protein, with two serves of veggies per pouch to support good digestion. It is free from added sugar, artificial colourings, artificial flavourings, preservatives, gluten and GM ingredients. It can be microwaved, and retails in a 120g pack.

Claims:
No Additives/Preservatives, Low/No/Reduced Sugar, Microwaveable, Babies & Toddlers (0-4), Premium, Gluten-Free, Digestive (Functional), Low/No/Reduced Allergen, Prebiotic, GMO-Free

Lovingearth Raw Organic Purple Kale Chips

Lovingearth Raw Organic Purple Kale Chips has been reformulated with a new recipe. The Australian certified organic product is made with seeds not nuts and comprises of pumpkin seeds, chia and beetroot.. It is said to have been created with the perfect balance of sweet and savoury flavours and is sourced from local organic growers and imported premium ingredients. The crunchy chips retail in a 40g pack.

Claims:
Organic, Premium, Ethical - Environmentally Friendly Product

Food Love Kitchen Kale, Quinoa & Lemon Hommus

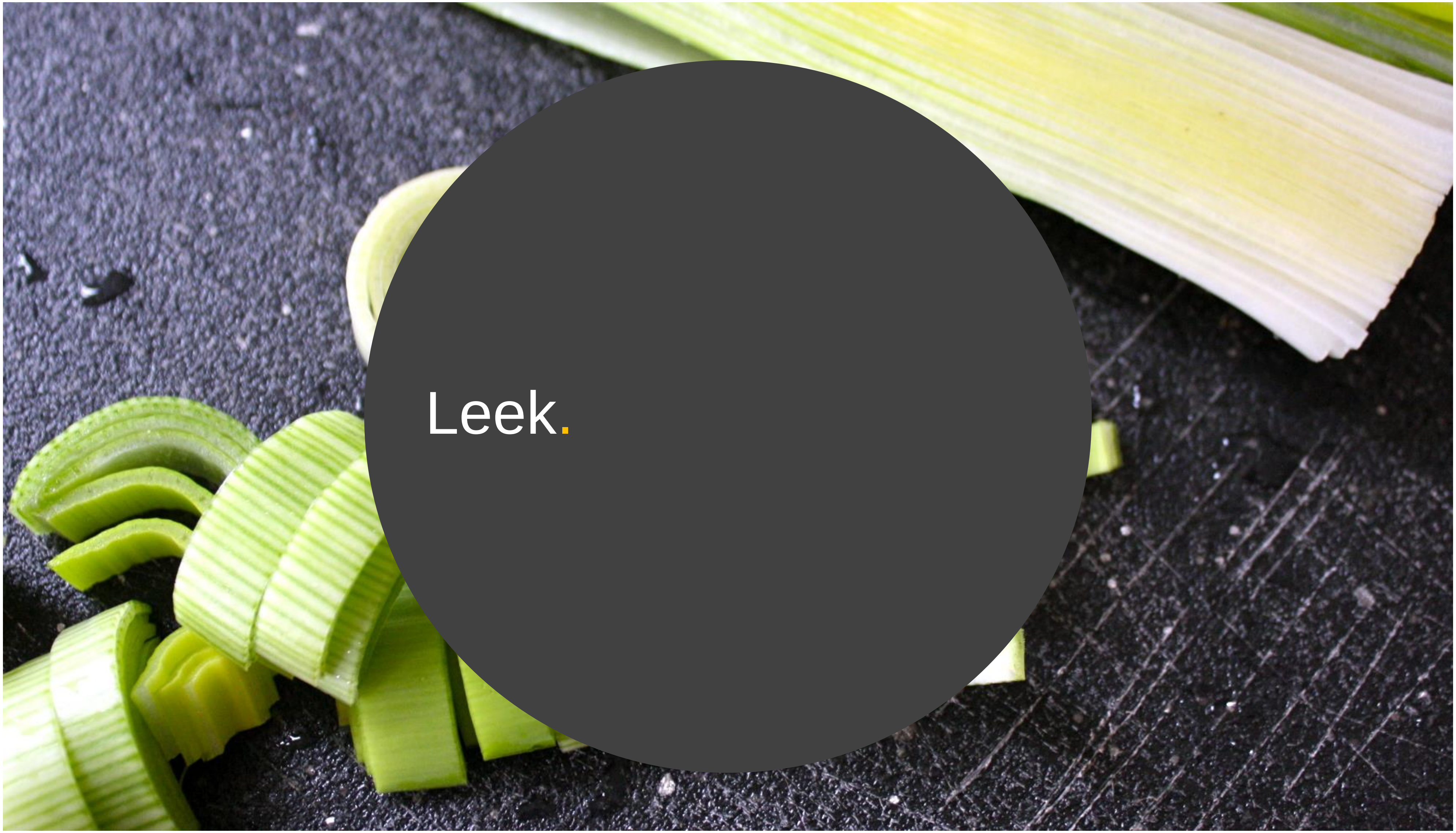
Food Love Kitchen Kale, Quinoa & Lemon Hommus is said to be made using only the best natural ingredients, such as fresh garlic and extra virgin oil. This product contains no gluten, and retails in a 150g pack.

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

Horticulture Innovation Australia

colmar brunton.

Source: Mintel (2016)



Leek.

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

Purchase is typically through mainstream retailers, which is consistent with past waves.

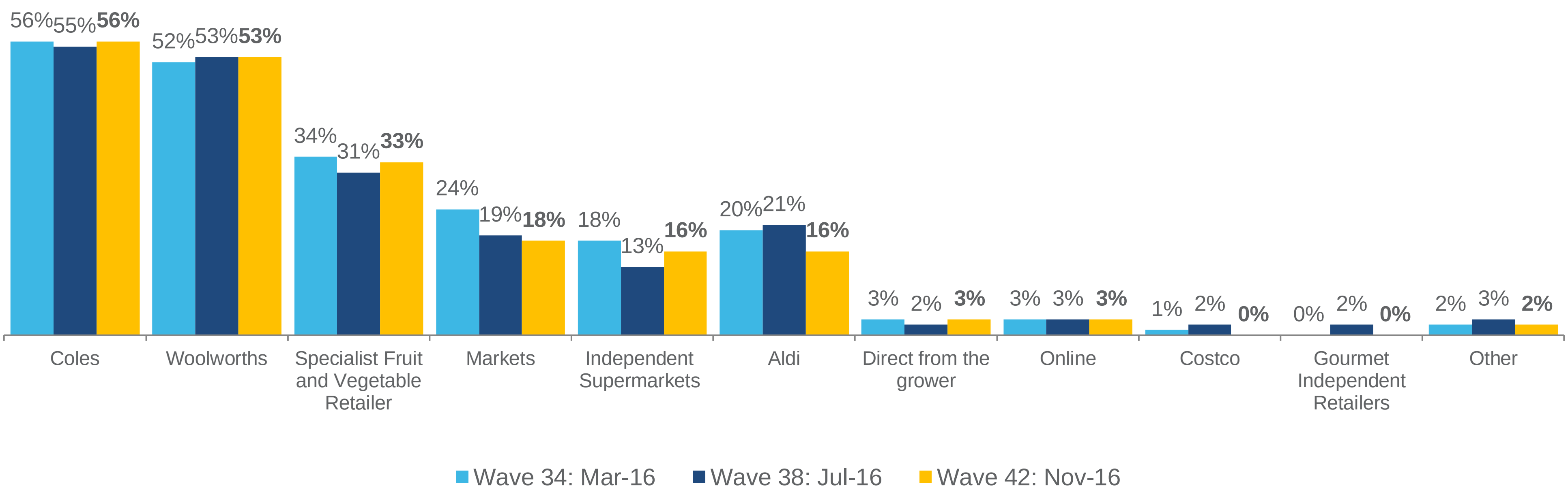
Average Purchase **2.1** times per month

▲ 2.2 times, Wave 34
▲ 2.3 times, Wave 38

Average Consumption **4.1** times per month

▲ 4.2 times, Wave 34
▼ 3.8 times, Wave 38

Purchase Channels



Q1. On average, how often do you purchase leeks?
Q2. On average, how often do you consume leeks?
Q5. From which of the following channels do you typically purchase leeks?
Sample Wave 34 N=202, Wave 38 N=200, Wave 42 N=201

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

Average Spend and Price Sensitivity.

Average weight of purchase

The average consumer typically purchases **700g** of leeks, remaining consistent with previous waves.

- 700g, Wave 34
- 700g, Wave 38

Recalled last spend

Recalled last spend on leeks was **$3.20**, higher than the previous wave.

- ▼ $3.10, Wave 34
- ▲ $3.40, Wave 38

Value for money

Consumers' perceived value for money is fair for leeks **(6.1/10)**, relatively consistent with past waves.

- 6.1/10, Wave 34
- ▲ 6.2/10, Wave 38

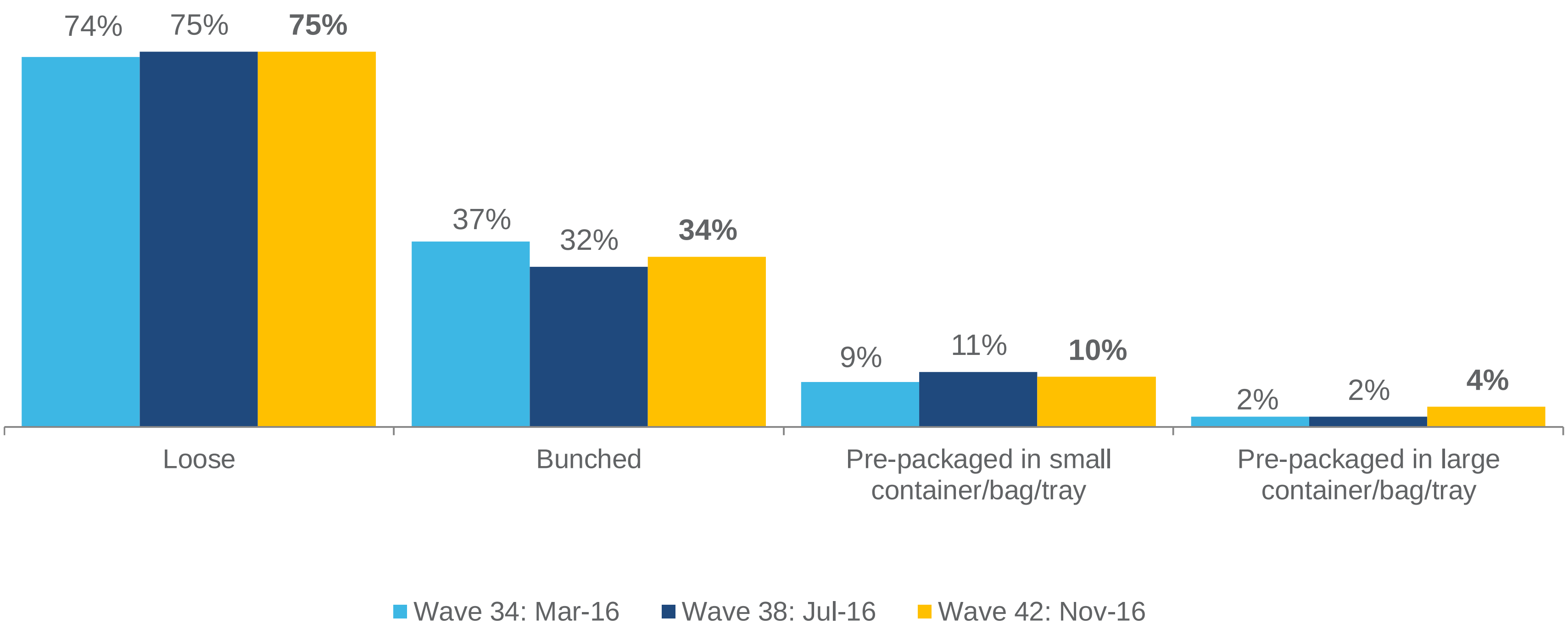
Q3. How much leek do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 34 N=202, Wave 38 N=200, Wave 42 N=201

Horticulture Innovation Australia

colmar brunton.

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

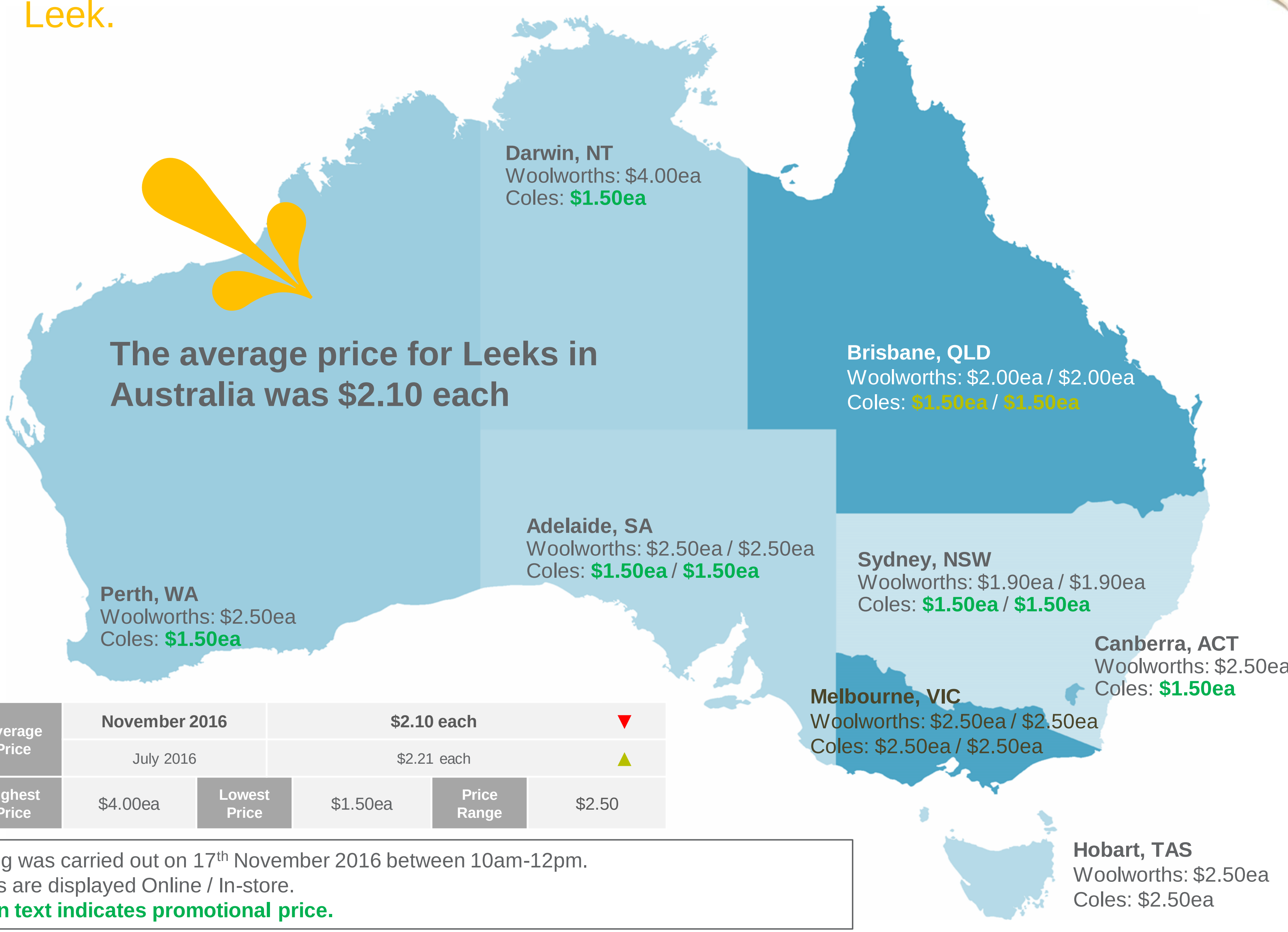
Individual leeks are the most common purchase format, consistent with past waves. Bunched leeks are also typically purchased.



Q4b. In what fresh formats do you typically purchase leeks?
Sample Wave 34 N=202, Wave 38 N=200, Wave 42 N=201

Online and In-store Commodity Prices.

Leek.



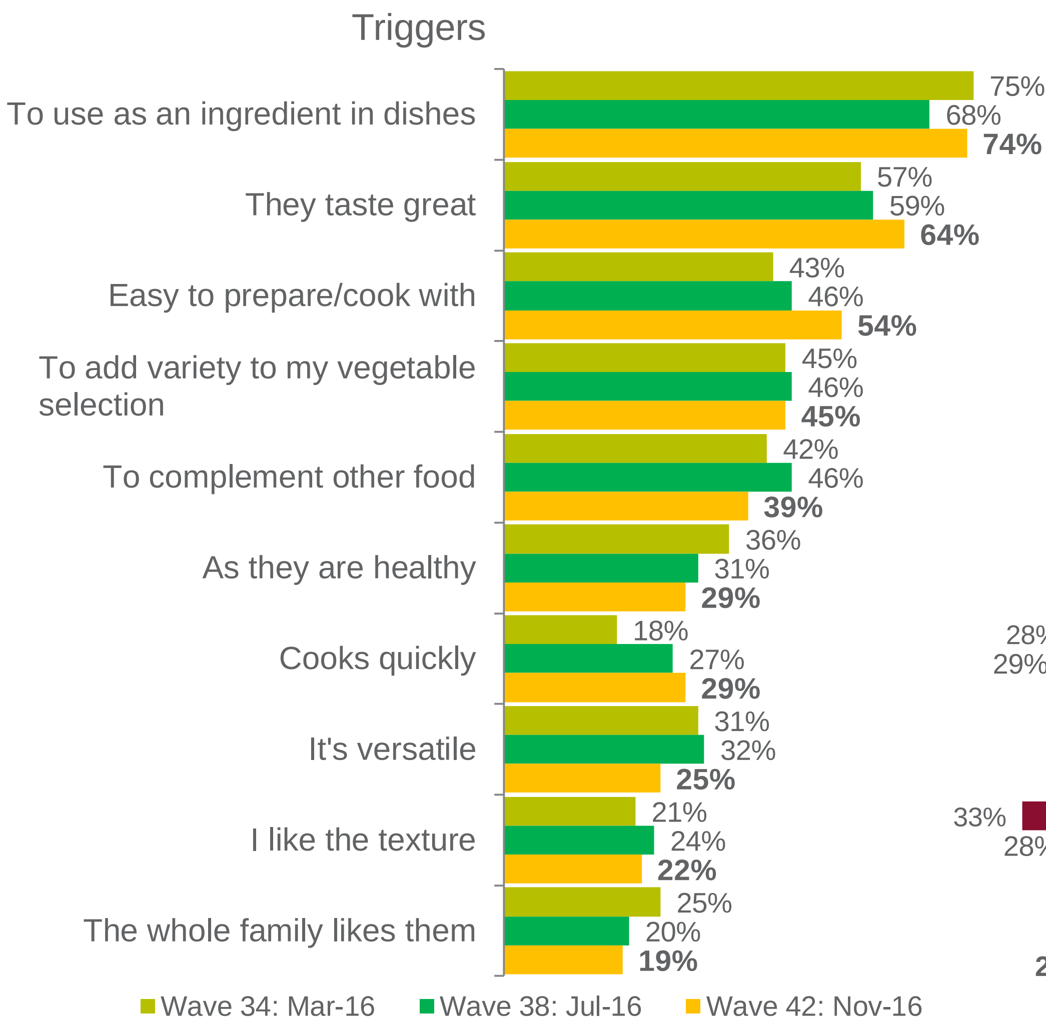
Average Price	**November 2016**	**$2.10 each** ▼			
	July 2016	$2.21 each ▲			
Highest Price	$4.00ea	Lowest Price	$1.50ea	Price Range	$2.50

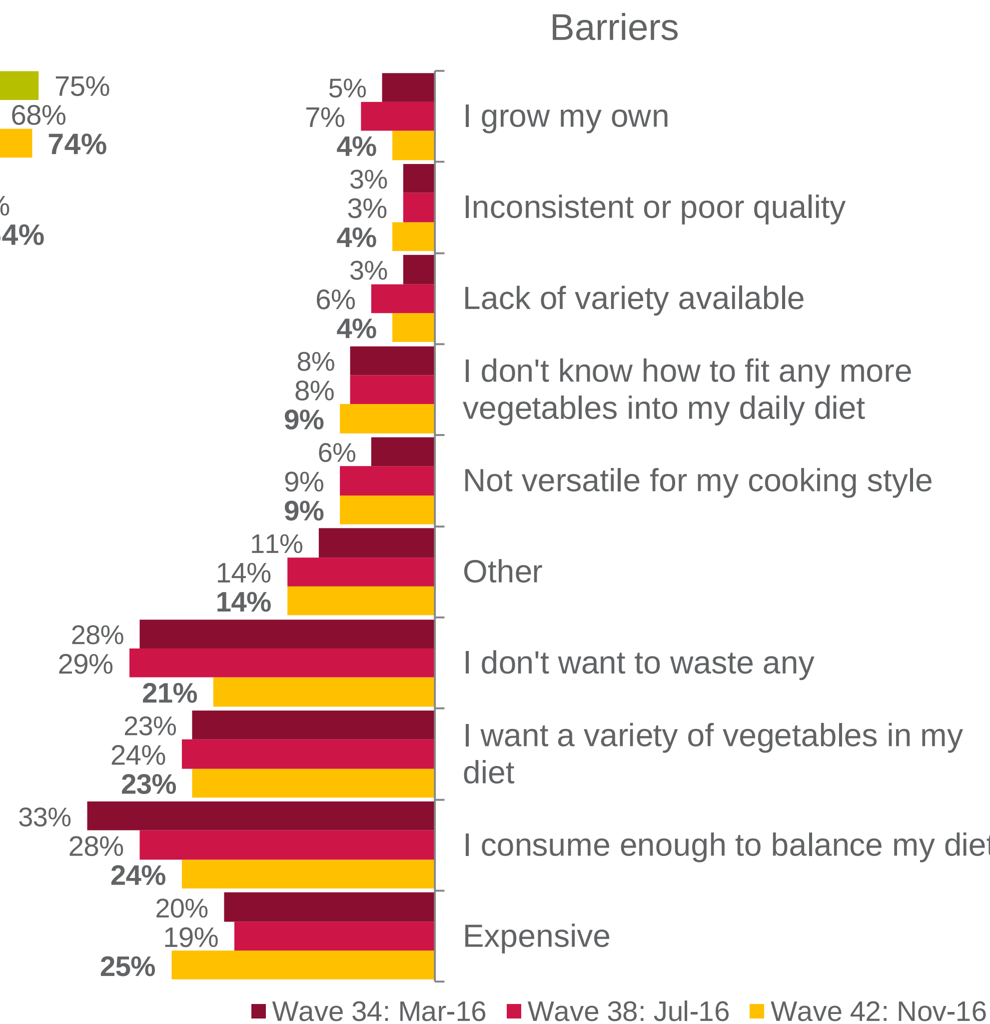
Pricing was carried out on 17th November 2016 between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates promotional price.

Awareness of leek varieties is low, with 84% of consumers unable to recall a type.

Q6a. What varieties of leek are you aware of? (unprompted)
Sample Wave 34 N=202, Wave 38 N=200, Wave 42 N=201

Using leeks as an ingredient in dishes, taste and ease of preparation are the key drivers of purchase. In contrast, barriers to purchase are price and already consuming enough to balance their diet.





Q7. Which of the following reasons best describes why you purchase leeks?
Q8. Which reason best describes why you don't buy leeks more often?
Sample Wave 34 N=202, Wave 38 N=200, Wave 42 N=201

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

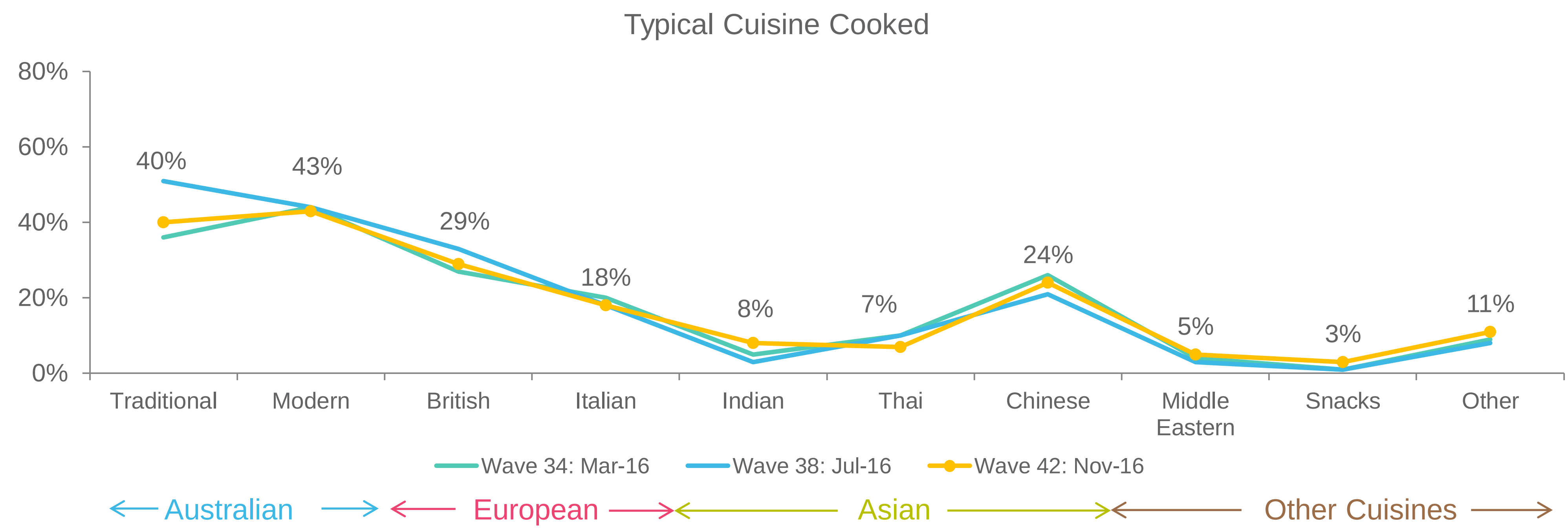
Meal occasions tend to occur during dinner. Over one quarter of consumers used leeks when cooking a new recipe.

Top 5 Consumption Occasions

	Wave 38	Wave 42
Dinner	64%	**68%**
Family meals	54%	**60%**
Weekday meals	39%	**43%**
Weekend meals	31%	**35%**
Quick Meals	23%	**33%**

28% used leeks when cooking a new recipe

▼ 25%, Wave 38



Q10. What cuisines do you cook/consume that use leeks?
Q11. Which of the following occasions do you typically consume/use leeks?
Sample Wave 34 N=202, Wave 38 N=200, Wave 42 N=201

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

Consumers prefer to serve leeks with potatoes. This wave sees a significant increase in leeks being paired with zucchini. Leeks are generally cooked in soups and stir fries, consistent with previous waves.

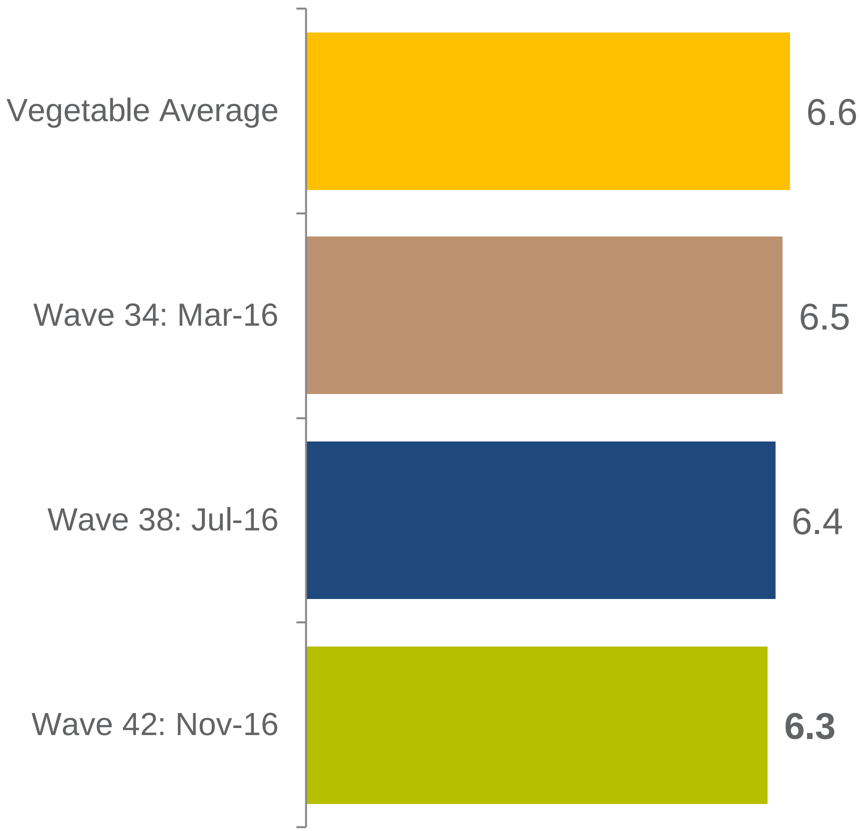
Accompanying Vegetables

Potato	61%
Carrot	41%
Garlic	26%
Onions	26%
Zucchini	24%

Top 10 Cooking Styles			
	Wave 34	Wave 38	Wave 42
Soup	59%	74%	**59%**
Stir frying	44%	41%	**45%**
Sautéing	37%	31%	**40%**
Slow Cooking	30%	35%	**29%**
Frying	26%	21%	**19%**
Steaming	18%	16%	**14%**
Roasting	13%	11%	**13%**
Boiling	13%	15%	**11%**
Baking	12%	11%	**11%**
Grilling	5%	3%	**4%**

Q9. How do you typically cook leeks?
Q10a. And when are you serving leeks which of the following do you also serve together with this?
Sample Wave 34 N=202, Wave 38 N=200, Wave 42 N=201

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



8.2

Wave 38: **8.1**

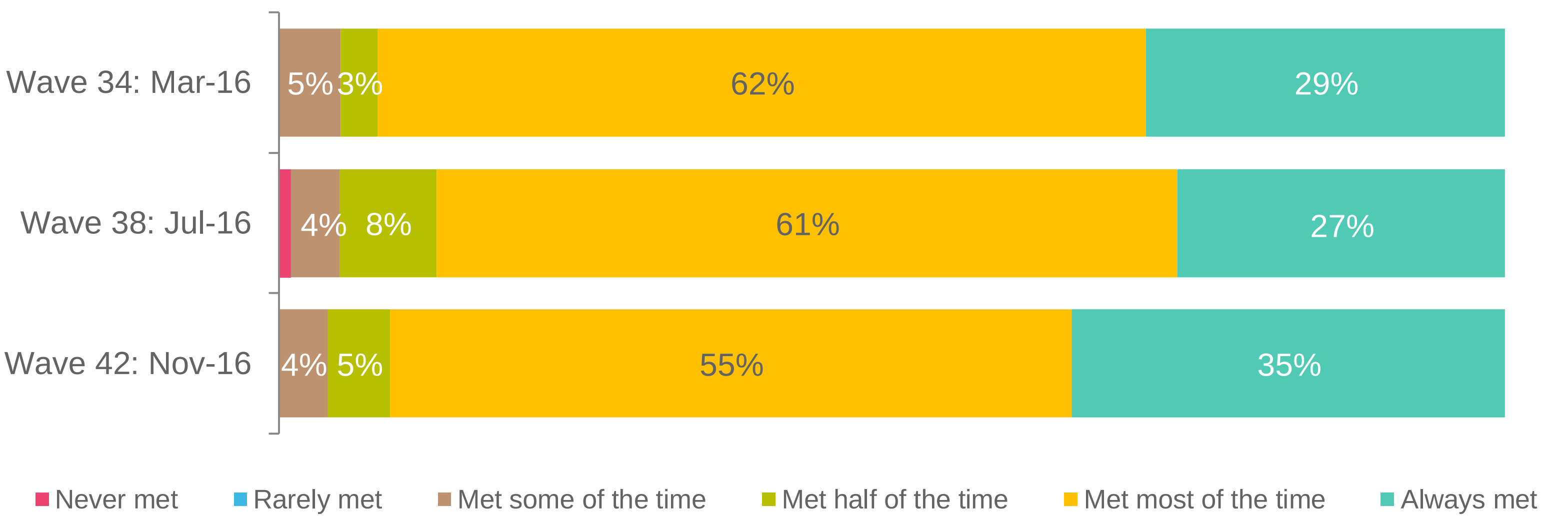
Q14. When purchasing leeks, how important is Provenance to you?
Q15. And when purchasing Leeks, how important is that it is grown in Australia?
Sample Wave 34 N=202, Wave 38 N=200, Wave 42 N=201

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

Expected to stay fresh for **9.3** days

▼ 8.7 days, Wave 34
▼ 9.2 days, Wave 38

Expectations Met



Q12. How long do you expect leeks to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy leeks?
Sample Wave 34 N=202, Wave 38 N=200, Wave 42 N=201

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

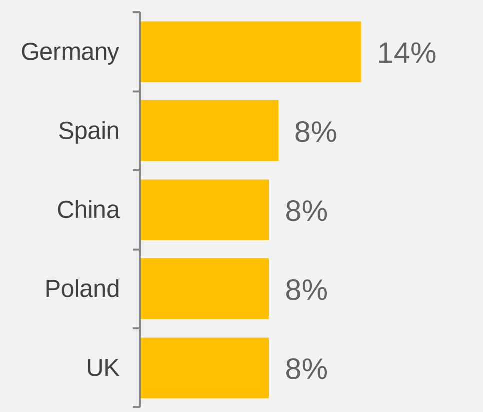
Leek Product Launch Trends.

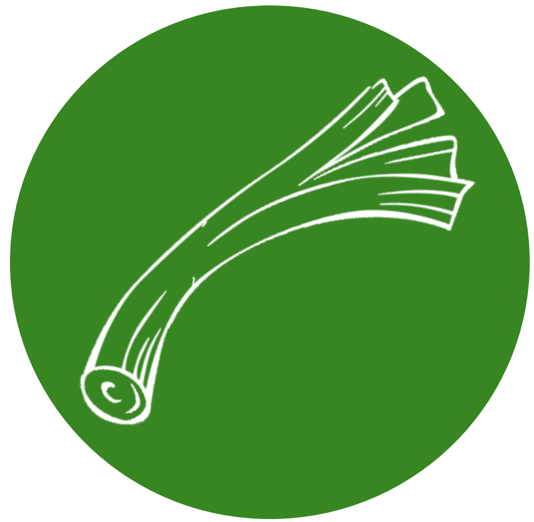
Leek Global Launches

August – November 2016

There were 355 leek products launched globally over the last three months. The majority of launches were in Germany and Spain. Categories for launches were meals and soups.

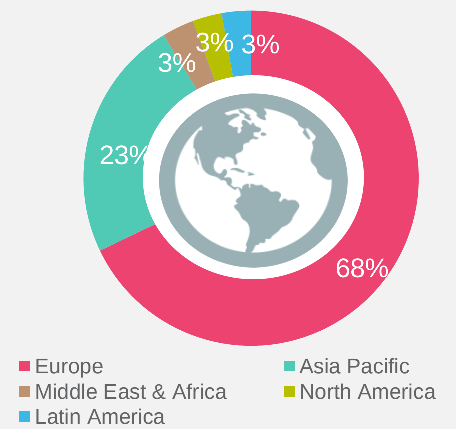
Country



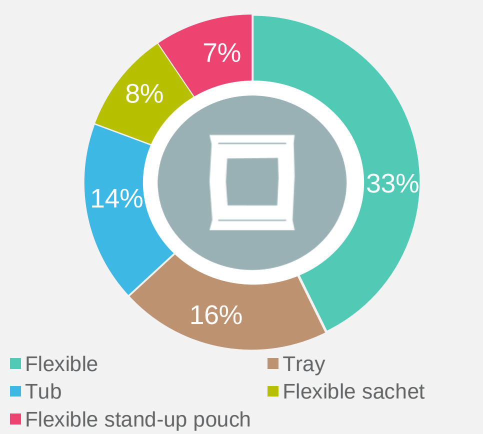


355 Global NPDs

Region



Top Pack Formats



Categories

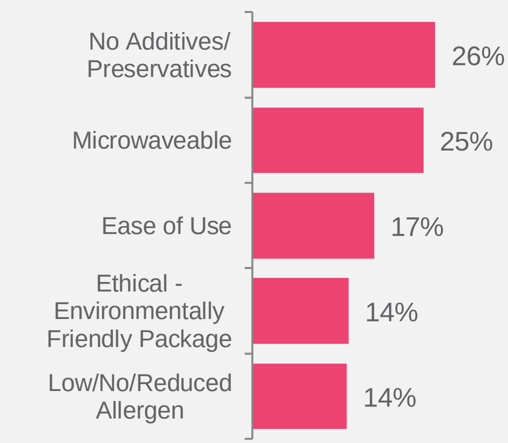
Meals 31%

Soup 19%

Sauces & Seasonings 16%

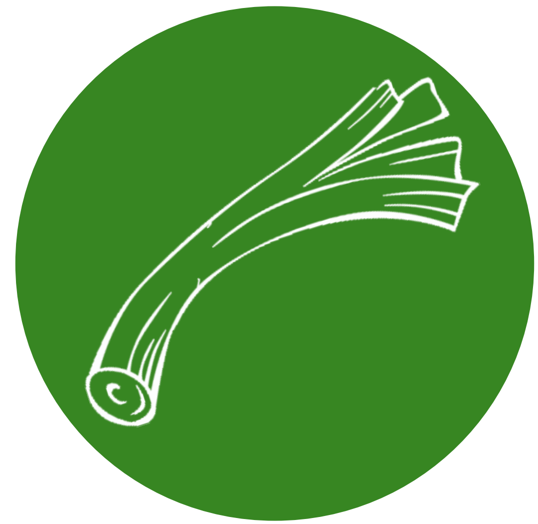
Processed Products 10%

Top Claims



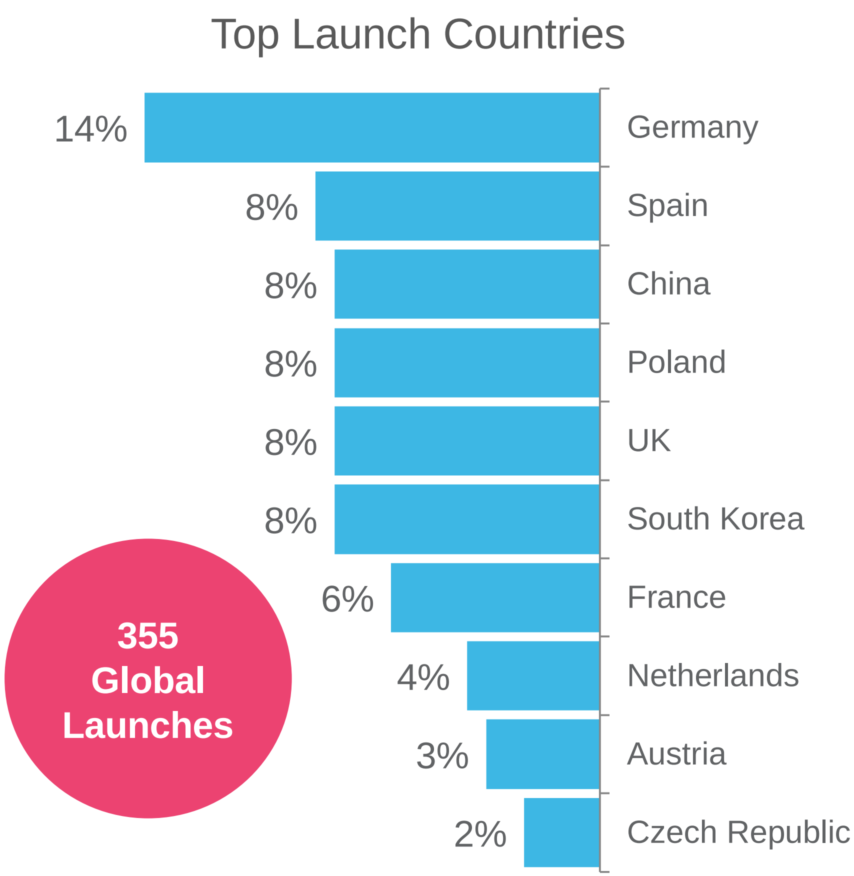
Leek Product Launches:
Last 3 Months (August – November 2016)
Summary

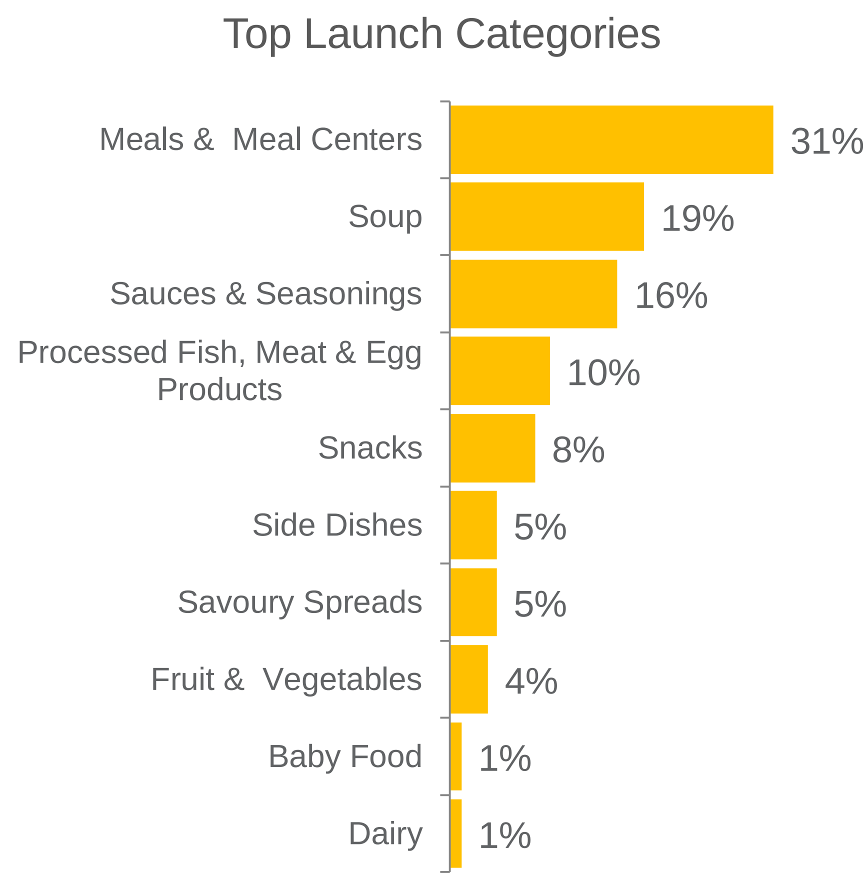
- There were 355 launches in the past 3 months globally that contained leeks as an ingredient, lower than the previous wave (428 launches).
- There were four products launched in Australia over the past three months.
- Europe (68%) was the key region for launches.
- Flexible packaging (33%) and trays (16%) were the most common format used for products.
- The main categories for launches were meals (31%), soups (19%), and sauces & seasonings (16%).
- Claims used on products included no additives/preservatives (26%), microwaveable (25%), and ease of use (17%).
- The most innovative product launched was Organic Spinach & Leek Flavoured Rice Balls from Poland. Other examples can be found in the following pages.



Source: Mintel (2016)

The majority of launches occurred in Germany and Spain. The key categories for leek launches are meals, soups and sauces & seasonings.





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

Pack Formats Used

Global	Flexible	33%
	Tray	16%
	Tub	14%
Europe	Flexible	26%
	Tray	20%
	Tub	16%
Asia Pacific	Flexible	54%
	Flexible stand-up pouch	17%
	Tub	10%

Top Claims Used

Global	No Additives/Preservatives	26%
	Microwaveable	25%
	Ease of Use	17%
Europe	Microwaveable	29%
	No Additives/Preservatives	27%
	Organic	20%
Asia Pacific	No Additives/Preservatives	20%
	Halal	20%
	Time/Speed	19%

Only regions with n >30 are displayed

Innovative Leek Launches:
L3M (August – November 2016)

Coop Chicken and Bacon Pie (Sweden)

Coop Matig Paj med Kyckling & Bacon (Chicken and Bacon Pie) is now available. This product comprises a precooked pie shell with fine pieces of chicken and flavourful bacon. The product can be heated in a microwave or regular oven, and it retails in a 220g pack containing one portion.

Claims:
Microwaveable

Biopont Organic Spinach & Leek Flavoured Rice Balls (Poland)

Biopont Chrupki Ryzowe ze Szpinakiem i Porem Bio (Organic Spinach & Leek Flavoured Rice Balls) are gluten free and comprise extruded rice balls made from controlled, organic farming ingredients. The seasonal limited edition product is GMO-free, suitable for vegans and retails in a 60g pack.

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

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

Uni-President Natural Shrimp and Leek Dumplings (Taiwan)

Uni-President Natural Shrimp and Leek Dumplings feature a chewy dumpling skin, a full filling and offer a fresh taste. These dumplings are free from preservatives, MSG and flavouring, and can be served by boiling, steaming or pan frying. The product retails in a 500g pack containing 20 pieces.

Claims:
No Additives/Preservatives

Source: Mintel (2016)

Innovative Leek Launches:
L3M (August – November 2016)

Happy Goat Fresh Goat Cheese with Fine Herbs (France)

Happy Goat Fromage de Chèvre Frais aux Fines Herbes (Fresh Goat Cheese with Fine Herbs) is now available. This organic product can be used as an aperitif or spread, and is suitable for vegetarians. It is made with organic milk form Netherlands, gluten-free, and retails in a 125g pack featuring the EU Green Leaf logo. This product was on display at SIAL 2016 in Paris, France.

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

Carrefour Bio Organic Vegetable Stock Granules (Italy)

Carrefour Bio Brodo Granulare Vegetale (Organic Vegetable Stock Granules) have been repackaged with an updated design. This organic-certified product has been made using ingredients farmed organically and without the use of synthetic fertilizers, pesticides, or GMOs in order to preserve the environment, and retails in a 150g pack with a measuring cup and featuring the EU Green Leaf logo.

Claims:
Organic, Ethical - Environmentally Friendly Product, GMO-Free

Jumbo Jamie Oliver 'Amazing' Fennel Dish (Netherlands)

Jumbo Jamie Oliver 'Amazing' Venkel Dish (Fennel Dish) is now available. The product comprises fennel, leek, cherry tomatoes, steamed baby potatoes and spinach. The dish cooks in 17 minutes, can be served with white fish or grilled chicken breast and retails in a 400g pack.

Claims:
N/A

Omis Schnelle Küche Spinach Cheese Dumplings (Germany)

Omis Schnelle Küche Spinat Käseknöderl (Spinach Cheese Dumplings) are made with fine Emmental cheese. The microwaveable product is said to be very fluffy and ready in three minutes. The dumplings are produced in Austria and retail in a 270g pack.

Claims:
Microwaveable, Time/Speed

Source: Mintel (2016)

Innovative Leek Launches:
L3M (August – November 2016)

AH Ovengroente Oven Vegetable Pumpkin, Sweet Potato and Caulifower (Netherlands)

AH Ovengroente Pompoen, Zoete Aardappel, en Bloemkool (Pumpkin, Sweet Potato and Cauliflower) is ready to be prepared in the oven or on the barbecue. This product is free from gluten and milk, and retails in a 425g pack, featuring the Gezondere Keuze (Healthier Choice) logo and containing a tub with seasoned grilling oil.

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

Sushinki Sushi for Kids (Poland)

Sushinki Sushi dla Dzieci (Sushi for Kids) is now available. It is described as a light and tasty snack for kids with dessert included. It can be consumed at home, at school or on the family picnic. This product contains salmon and fresh vegetables, and retails in a 210g pack.

Claims:
Children (5-12), On-the-Go

Findus Just Wok It Hong Kong Vegetable Mix (Norway)

Findus Just Wok It Hong Kong Vegetable Mix has been relaunched with a new brand name, previously known as Findus Wok. It contains red onion, garden peas and chili, and is ready in seven minutes. The product retails in a 450g recyclable pack bearing preparation instructions.

Claims:
Ethical - Environmentally Friendly Package, Ease of Use

Keohane's of Bantry Fish Made Easy Salmon with Vegetable, Wild Rice and Chipotle (Romania)

Keohane's of Bantry Fish Made Easy Somon cu Legume, Orez Salbatic si Chipotle (Salmon with Vegetable, Wild Rice and Chipotle) is now available. This microwavable product can be cooked in six to seven minutes, and retails in a 260g pack providing one serving.

Claims:
Microwaveable, Ease of Use

Source: Mintel (2016)

Australian Leek Launches:
L3M (August – November 2016)

International Cuisine Japanese Style Prawn Gyoza

International Cuisine Japanese Style Prawn Gyoza are succulent prawn pieces with vegetables wrapped in a light dumpling pastry that can be pan fried, steamed or boiled. The product is free from artificial colours and preservatives, has a Health Star rating of three out of five, and retails in a 1kg pack, containing 48-50 dumplings and featuring preparation instructions.

Claims:
No Additives/Preservatives

The Real Risotto Chicken and Mushroom Risotto with Oregano

The Real Risotto Chicken and Mushroom Risotto with Oregano is now available. This heat and eat product can be microwaved in four minutes and 30 seconds, and is free from artificial colours and flavours. It retails in a 500g pack.

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

Farm Foods Pork & Leek Sausages

Farm Foods Pork & Leek Sausages are new to the range. The gluten-free product is crafted from fresh Australian pork, sautéed leek, seasoned with mustard, roasted garlic and thyme. It retails in a 450g pack.

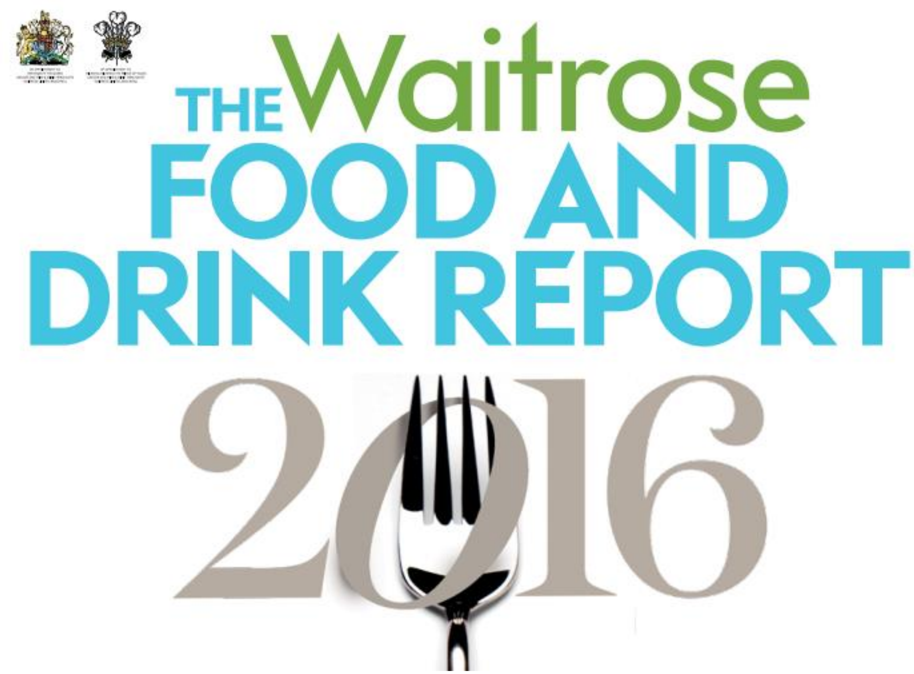
Claims:
Gluten-Free, Low/No/Reduced Allergen

Source: Mintel (2016)

In the Media.

General Vegetable News
(August – November 2016)

- Vegetable yogurt will become the trendy new food of choice next year, replacing traditional sweet flavours in the fridges of fashion-conscious shoppers, Waitrose has predicted.
- Varieties such as carrot, beetroot and sweet potato have proved an unexpected hit in the US and will soon be making a mark in Britain, the supermarket said in its annual food and drink trends report.
- The unlikely sounding product is due to follow up the 2016 success of seaweed, cactus water and bao buns, indicative of a public in thrall to “hip” new foods that look good on social media, the report said.
- The report also found that people are taking increasing care over the presentation of their home-cooked food because of social media.
- Almost 44 per cent of survey respondents said they made more of an effort when preparing food if they thought a photo of it would be posted on Instagram or other sites, while one in five said they had posted or sent a picture of food within the last month.



http://www.telegraph.co.uk/

Commodity News
(August – November 2016)

- This year's broccoli production in Spain will match that of previous campaigns, in spite of the "initial uncertainty" among growers, who delayed the first plantings in June, following the outcome of the Brexit referendum and "the uncertainty about whether there would be enough water for irrigation."
- "The Brexit generated doubts regarding how the market was going to behave, but it is a question of trends that may change in the long term and which may eventually result in the sale of Spanish broccoli no longer being profitable in the United Kingdom. In any case, such trends should not change in the short or medium term," said the secretary of the consortium for the promotion of broccoli, +Brócoli, Javier Bernabéu

http://www.freshplaza.com/

- Morrisons has launched the 'Hotter than Hell' pizza, featuring the British grown Naga - one of the world's hottest chillies. Created for Halloween, it is believed to be the hottest supermarket pizza ever made in the UK.
- The Naga chilli has a Scoville rating of up to 1 million - 200 times spicier than Tabasco sauce, and 200 times hotter than a Jalapeño.
- Morrison's pizza counter staff are under strictly controlled conditions when preparing the pizza, even donning safety goggles, latex gloves, aprons and using dedicated chopping equipment to handle the Naga.

http://www.plymouthherald.co.uk/

- Astronauts aboard the International Space Station have started planting their third on-orbit crop of red romaine lettuce, NASA said.
- "Once the plants are approximately four weeks old, a selection of leaves can be harvested for a bit of fresh lettuce and possibly science samples," explained said Nicole Dufour, NASA's Veggie project manager.
- Astronomers are using a plant growth system called "Veggie" for their experiment. Techniques learned from Veggie crops will help NASA prepare for the Journey to Mars.

http://www.hindustantimes.com/

- Branch Farms, based in South Bay, FL, is celebrating both its 60th anniversary, and the launch of its new sweet corn variety, 'Sweet Emotion.'
- Going forward, retailers who join the Sweet Emotion program receive exclusivity in their respective markets. All participating retailers also gain access to marketing support, including point-of-sale materials and social marketing content.
- After several years of working with seed breeders and grower partners, the team at Branch Farms determined which varieties performed best in terms of taste, quality, and shelf life.

http://www.freshplaza.com/

Commodity News
(August – November 2016)

- Wal-Mart has begun offering Signature Sidekicks by Robert Irvine, a line of four fresh-cut vegetable products for use in cooking and meal preparation.
- Preparation instructions are on the back. Ingredients are separately bagged within the pack. Preparation time is 10 minutes or less, according to Robert Irvine Foods.
- One of the Signature Sidekick products includes – Sesame Ginger Stir Fry with bok choy, red onions, carrots, snow peas, Asian sesame ginger sauce, garlic and grapeseed oil.

http://www.thepacker.com/

- What began as a grassroots effort to celebrate the nutritional benefits of kale as a trending superfood, has grown into a worldwide movement. The fourth annual National Kale Day was on October 5, 2016.
- In recent years, kale's popularity has grown in both supermarkets and on restaurant menus. In fact, Whole Foods Market now buys and sells more kale than all other greens combined and other retailers have reported triple digit sales increases. This growing interest in kale has growers and manufacturers excited about the opportunity to promote, not just kale, but all leafy greens.

http://www.freshplaza.com/

- A gardener from Wales has won special permission from Government officials to send his giant leeks more than 6,000 miles to Japan.
- Kevin Fortey, 38, wanted to send two 6ft-high giant veg to Tokyo – but was warned his leeks could be dangerous.
- World record vegetable grower Kevin was contacted by a television company doing a programme on Welsh culture and wanted to be sent the country's national vegetable.

http://www.walesonline.co.uk/

Project Harvest Background & Methodology

Background to the research.

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

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

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

This wave's report (Wave 42, November 2016) focuses on:

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

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

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

Horticulture Innovation Australia

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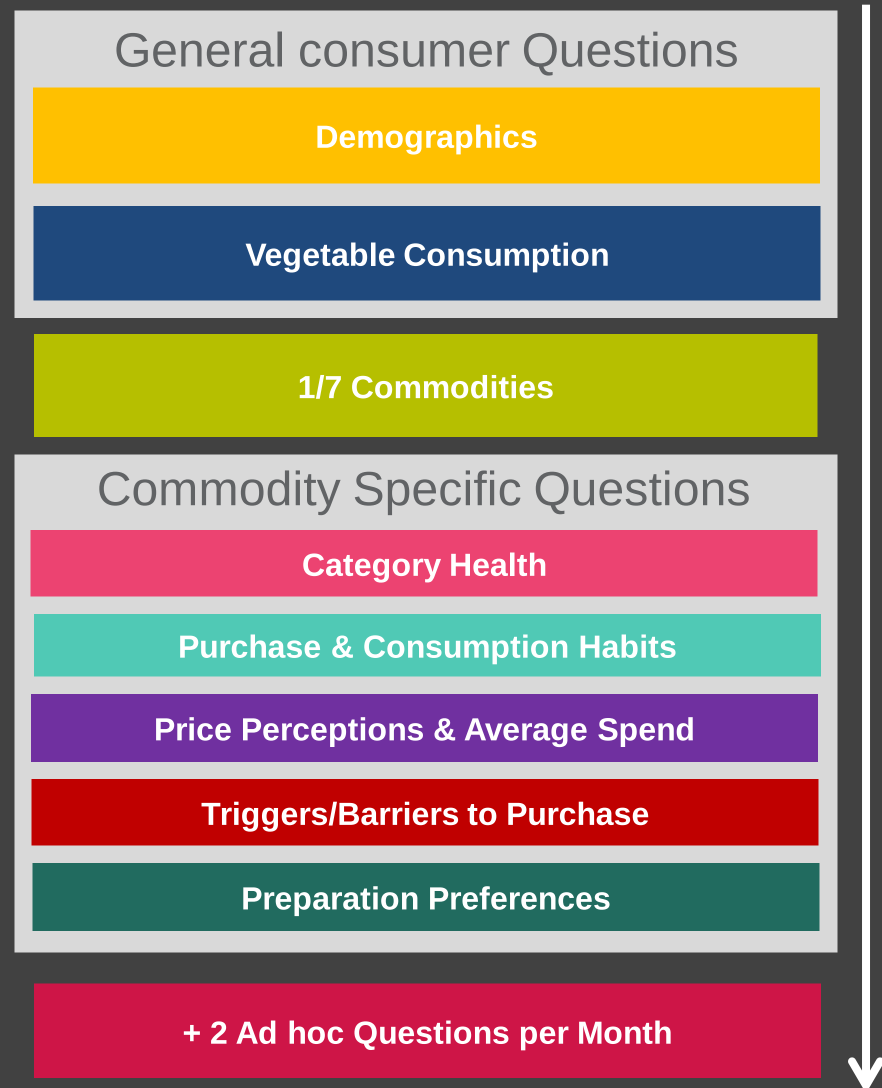
Online Methodology.

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



Sample.

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

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

To qualify for the questionnaire, consumers...

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

	Broccoli n=315	Chilli n=201	Lettuce n=313	Sweet Corn n=307	Green Peas n=306	Kale n=202	Leek n=201
Gender							
Male	40%	60%	38%	38%	33%	41%	40%
Female	60%	40%	62%	62%	67%	59%	60%
Age							
18-24 y.o.	4%	3%	4%	3%	3%	3%	2%
25-34 y.o.	12%	10%	9%	21%	19%	20%	12%
35-44 y.o.	17%	14%	14%	21%	18%	19%	11%
45-54 y.o.	19%	20%	19%	21%	17%	22%	14%
55-64 y.o.	24%	27%	26%	19%	22%	20%	22%
65+ y.o.	24%	25%	28%	16%	23%	15%	38%
Household							
Single Income no Kids	19%	23%	22%	13%	19%	22%	21%
Double Income no Kids	17%	22%	15%	14%	16%	20%	18%
Young Families	14%	9%	11%	20%	17%	16%	11%
Established Families	24%	17%	24%	30%	24%	23%	14%
Empty Nesters	27%	28%	28%	23%	25%	18%	36%
Location							
New South Wales	17%	17%	16%	17%	17%	24%	17%
Victoria	18%	24%	14%	18%	17%	26%	23%
South Australia	15%	18%	20%	13%	15%	9%	20%
Queensland	15%	16%	15%	21%	13%	17%	15%
Western Australia	15%	16%	14%	14%	16%	18%	15%
Tasmania	15%	5%	13%	8%	11%	3%	6%
Australian Capital Territory	5%	3%	7%	7%	9%	2%	2%
Northern Territory	1%	0%	1%	1%	1%	0%	0%

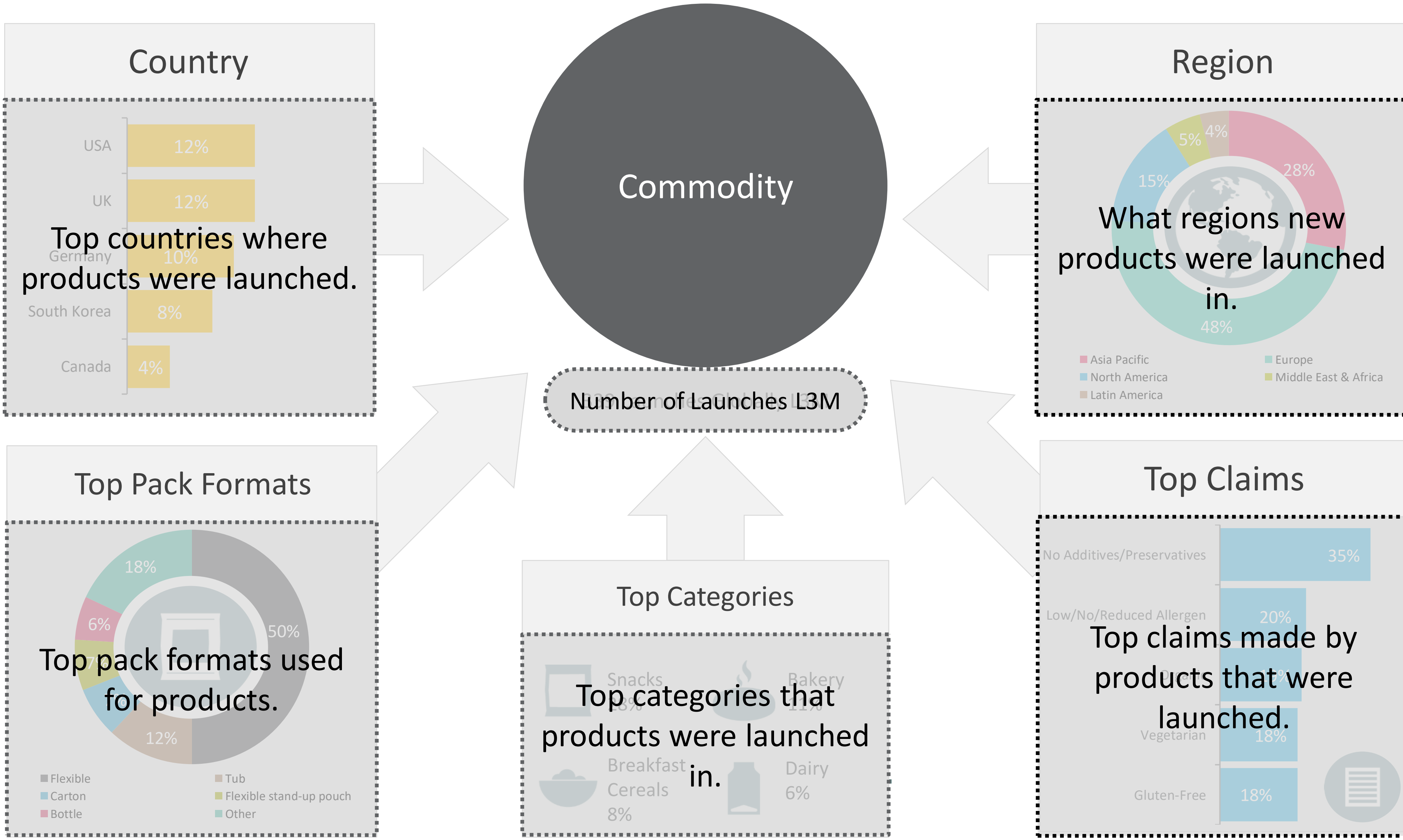
Trends Research: Our Approach

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

Product Launches Last 3 Months (L3M)

How to Read Summaries

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



Thanks.

Horticulture Innovation Australia

colmar brunton.