



# Project Harvest Monthly Tracker Report.

## **Wave 43, December 2016**

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

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

**Horticulture  
Innovation**  
Australia



**colmar brunton.**





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# Wave 43: Executive Summary



# Industry Insight

Recently, an educational initiative aimed at increasing children's willingness to eat vegetables was announced. Supported by Hort Innovation and managed by CSIRO, the looks at strategically increasing children's intake of fresh produce<sup>1</sup>.

But why is this such an important initiative?

The desperate need for a healthy diet can be seen in the current snapshot of Australian health as summarised by the Australian Government's Preventative Health Department<sup>2</sup>.

- The prevalence of being overweight or obese in Australia has been steadily increasing over the last 30 years
- 63% of adults and 25% of children are now overweight or obese – a 10% increase in a decade and a 20% increase from the 1960's
- The combined effect of obesity factors including poor diet, lack of physical inactivity, high body mass, high blood pressure and high cholesterol – is responsible for more than 50% of the total burden of cardiovascular disease and approximately 60% of the burden for type 2 diabetes

Without intervention, Australia's poor health is predicted to increase even further. New modelling by the University of Sydney's School of Public Health predicts 35% of adults will be clinically obese by 2025, with young people gaining weight at higher rates than ever before<sup>3</sup>.

**These predictions highlight the importance of the educational initiatives around vegetable consumption such as that seen recently between Hort Innovation and CSIRO. We look forward to tracking this project!**

1. <http://ausveg.com.au/media-release/veg-industry-teaching-kids-their-abcs-artichokes-broccoli-and-carrots>

2. [http://www.health.gov.au/internet/preventativehealth/publishing.nsf/content/a06c2fcf439ecda1ca2574dd0081e40c/\\$file/discussion-28oct.pdf](http://www.health.gov.au/internet/preventativehealth/publishing.nsf/content/a06c2fcf439ecda1ca2574dd0081e40c/$file/discussion-28oct.pdf)

3. <http://www.abc.net.au/news/2016-09-29/obesity-health-crisis-new-modelling/7888554>





## Wave 43 Fast Facts

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

40%

of consumers eat cabbage as part of a quick meal.

1.

### Insight:

Quick meals have continually increased as an consumption occasion over the last three waves.

### Short Term Recommendation:

Provide quick meal recipe ideas that promote new meal occasions such as cabbage fritters, or bacon & fried cabbage for breakfast, and Indian cabbage pakora for snacks. Recipes should aim to increase consumption occasions.

2.

### Insight:

Consumers are highly satisfied with cabbage.

### Long Term Recommendation:

There is strong future purchase intent for cabbage. Growers and the supply chain are delivering quality produce which has improved overall perceptions of cabbage. Look to build on this effective and successful platform.





## Wave 43 Fast Facts

- This wave sees greater importance and satisfaction for Celery.
- Celery is purchased three times per month and consumed on average ten occasions per month, which has slightly increased since the previous wave.
- Consumers typically prefer whole bunches of celery (48%). Recalled last spend is \$2.90, relatively consistent with past months. Overall, celery is perceived to be good value for money.
- Price tracking indicates the average price per bunch of celery in December 2016 is \$2.49, noticeably lower than prices recorded in August 2016 (\$4.39).
- Spontaneous awareness of celery types remains very low, with 81% of consumers unable to state a type.
- Top triggers to purchase are to use as an ingredient in dishes, health and ease of preparation. Limiting waste is the main barrier to purchase.
- Consumers expect celery to remain fresh for ten days, with longevity perceptions remaining consistent over recent waves.

62%

of consumers eat celery raw.

1.

### Insight:

Although consumers typically purchase whole celery, there is increased purchase of pre-packaged formats (18%). This wave also sees an increase in health as a trigger to purchase.

### Short Term Recommendation:

Investigate celery packing formats, as these add value to the produce. Packers should look to incorporate health and nutritional information where possible in order to promote consumption.

2.

### Insight:

Overall consumption of celery is higher, with increases in snacking.

### Long Term Recommendation:

Utilise “ugly veg/ seconds” celery with pre-prepared snack foods such as shredded celery for coleslaw and celery sticks.





## Wave 43 Fast Facts

- ▶ Consumers are generally satisfied with cucumbers and holds strong future purchase intent.
- ▶ Cucumber is purchased on average 4 times per month and consumed around 12 times per month. Purchase is primarily made through mainstream retailers.
- ▶ Weight of purchase remains stable this wave, with consumers purchasing on average 700g of cucumber.
- ▶ Price tracking of Lebanese cucumbers reveals a national average of \$5.29 per kg in December, which is noticeably lower than the previous wave (\$7.63 per kg in August 2016).
- ▶ Just under one third of consumers are unable to recall a type of cucumber. Lebanese and Continental/Telegraph types hold the greatest recall.
- ▶ Cucumber is expected to stay fresh for 8 days, with an increase in expectations being met all of the time.
- ▶ Key drivers of purchase are predominately influenced by taste and health. Barriers to purchase are not wanting to waste any and already consuming enough.

6.7/10

is the perceived value for money for cucumbers.

1.

### Insight:

Expected length of freshness has slightly declined over the past three waves.

### Short Term Recommendation:

Look to overseas packaging trends that may be adopted in Australia e.g. bio-degradable cardboard boxes instead of plastic wrap. These formats are more environmentally friendly and eye catching to consumers.

2.

### Insight:

There was a lack of uplift in cucumber consumption during peak season.

### Long Term Recommendation:

Focus on alleviating consumer concern in regards to quality and freshness, which may be inhibiting current purchase and consumption. Highlight “new season” at point of sale to educate and engage consumers.



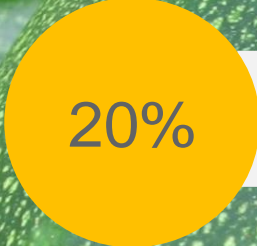




# Zucchini Grower Action Plan.

## Wave 43 Fast Facts

- Consumers are generally satisfied with zucchini, and hold high levels of endorsement.
- Consumers purchase zucchini on average 4 times per month and consume 8 times per month. Key retailers for zucchini purchase remain mainstream and specialist stores.
- Weight of purchase (700g) and value for money (6.4/10) both declined this wave. Recalled last spend in December was \$3.30, consistent with the previous wave.
- Zucchini's national average price continues to increase, sitting at \$6.82 per kg in December 2016. This is compared to \$5.87 per kg in August 2016 and \$3.65 per kg in April 2016.
- Awareness of zucchini types remains very low, with nearly three quarters of consumers unable to name a variety. Those who can are largely prompted by colour.
- Zucchini is expected to remain fresh for just over a week, with expectations of freshness likely to be met most of the time.
- Top triggers to purchase are ease of preparation and that it cooks quickly. Consumers limit purchase of zucchini because they don't want to waste any and already consume enough to balance their diet.



of consumers purchase zucchinis in pre-packaged small trays.

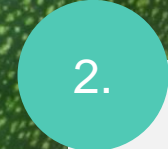


### Insight:

Future purchase intent of zucchini is lower than the Vegetable Average, with 40% of consumers regularly purchasing zucchini.

### Short Term Recommendation:

At the retail level, ensure zucchinis have appropriate displays including country of origin, flavour descriptions and popular cooking styles. Increased information at point of sale will help convert trial.



### Insight:

Price has noticeably increased as a barrier to purchase this wave.

### Long Term Recommendation:

Look to add value to the commodity by producing pre-packaged formats. Purchase of these formats have increased over time. Pre-packaged zucchinis will appeal to time poor consumers.





# Eggplant Grower Action Plan.

## Wave 43 Fast Facts

- ▶ Eggplant has low importance relative to the Vegetable Average, but holds strong levels of interest, endorsement and future purchase intent.
- ▶ Purchase occasions occur approximately three times per month and are consumed five times per month, both increasing this wave. Mainstream and specialist retailers are the main outlets for purchase.
- ▶ Consumers purchase 1.0kg of eggplant per shop. Recalled last spent has increased to \$4.70, with value for money perceived as fair (6.1/10).
- ▶ Pricing analysis revealed the national average price for purple eggplant is \$6.72 in December 2016, which is lower than \$8.06 in August 2016.
- ▶ Unprompted awareness of eggplant types remains low, with approximately two thirds of consumers unable to recall a type.
- ▶ Key influences to purchase are taste and to use as an ingredient in dishes. Key barriers to purchase are price and wanting a variety of vegetables.
- ▶ Eggplant is expected to remain fresh for just over a week. This expectation is being met most of the time.

19%

of consumers used eggplant when cooking a new recipe.

1.

### Insight:

Consumers are purchasing a greater volume of eggplants per shop.

### Short Term Recommendation:

With the uplift in demand for eggplants, ensure that the supply chain can adequately distribute increased volumes. Look to non-traditional channels for distribution such as online.

2.

### Insight:

Lack of eggplant varieties available has trended upwards as a barrier to purchase.

### Long Term Recommendation:

Growers should look to overseas varieties currently being sold in stores. Varieties that have a different appearance (shape, colour) or flavour will widen its appeal and usage repertoire.





## Wave 43 Fast Facts

- ▶ Consumers are satisfied with spring onions, sitting above the Vegetable Average. The majority of consumers indicate they intend to purchase the same amount as they currently do.
- ▶ Purchase frequency of spring onion occurs 3 times per month and it is consumed on 9 occasions per month on average, both higher than the previous wave.
- ▶ On average, consumers purchase 500g of spring onion and recalled spending \$2.50 on their last shop.
- ▶ Analysis of national pricing revealed an average price of \$2.21 each. Spring onion is perceived to be good value for money (6.9/10).
- ▶ Awareness of spring onion varieties is very low, with 82% unable to recall a type.
- ▶ The primary triggers to purchase are to use as an ingredient and great taste. Limiting waste remains the main barrier to purchase.
- ▶ Consumers expect spring onion to remain fresh for over a week, and this longevity is likely to be met most of the time.

9.4

times per month

is the average number of times spring onions are consumed.

1.

### Insight:

Consumption frequency and average weight of purchase are increasing over time.

### Short Term Recommendation:

To continue growth of the category, look to provide additional formats that meet consumer needs of convenience, versatility and freshness e.g. chopped garnish packs.

2.

### Insight:

Consumers perceive spring onions to be good value for money.

### Long Term Recommendation:

To strengthen value perceptions continue educating consumers on the versatility of spring onions. Use packaging as a way to communicate cuisine and cooking styles.







## Wave 43 Fast Facts

- ▶ Radish has high levels endorsement, interest and future purchase intent.
- ▶ Radishes are purchased on average three times per month and consumed nine times per month. Purchase is primarily from mainstream retailers.
- ▶ On average consumers are purchasing 500g of radish, down from 700g in August 2016. Recalled last spend was \$3.30, with value for money perceived to be fair (6.1/10). All three measures have declined since the previous wave.
- ▶ Price tracking revealed an average price of \$3.34 per bunch in December 2016, consistent with prices tracked in August 2016 (\$3.22 per bunch).
- ▶ Awareness of radish types is very low, with approximately three quarters of consumers unable to recall a type.
- ▶ The main motivations for purchasing radish are taste and adding colour to a meal. Already consuming enough and not wanting to waste any are key barriers to purchase.
- ▶ Radish is expected to stay fresh for approximately 8 days, with these expectations being met at least most of the time.

500g

is the average weight of radishes purchased per shop in Wave 43.

1.

### Insight:

Seasonality and lack of availability are increasing as barriers to purchase.

### Short Term Recommendation:

Provide recipe ideas on pack or at point of sale that provide inspiration for consumption outside of the warmer months. This may include roasting, grilling, pickling or braising radishes, as currently the majority of consumers only eat them raw. Additionally, look to supply chain efficiencies for continuous distribution.

2.

### Insight:

There is high interest in new varieties of radish.

### Long Term Recommendation:

Look to overseas innovations to increase interest in radishes. For example in Italy, a radish cultivator has introduced radishes without leaves, allowing their clients to receive more uniform and easier to process radishes. This then allows for easier production of products such as pre-packaged julienned radishes.





**Wave 43:**  
Response to Ad hoc  
Questions





# Speciality retailers are perceived to provide the best value, quality and choice when it comes to fresh vegetables.

Coles is rated second amongst all three measures, in front of Woolworths, Aldi and Independents. Aldi is significantly lower than all other purchase channels in terms of choice.



When thinking about the retailers in Australia, who do you feel provides the best **value** for fresh vegetables?  
 When thinking about the retailers in Australia, who do you feel provides the best **quality** for fresh vegetables?  
 When thinking about the retailers in Australia, who do you feel provides the best **choice** for fresh vegetables?  
 N=623

\*\*\* Letters represent a significant difference at a 95% confidence level





# Wave 43: Overall Vegetable Tracking





# Vegetables Purchased Last Month.

Tomatoes, potatoes, carrots and onions were the most purchased vegetables in December.

The biggest declines in purchase this wave were cauliflower and cabbage.



Sample Wave 43, N=1217

S8. Which of the following fresh vegetables have you purchased in the last month?



# Category Health Explained

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

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

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





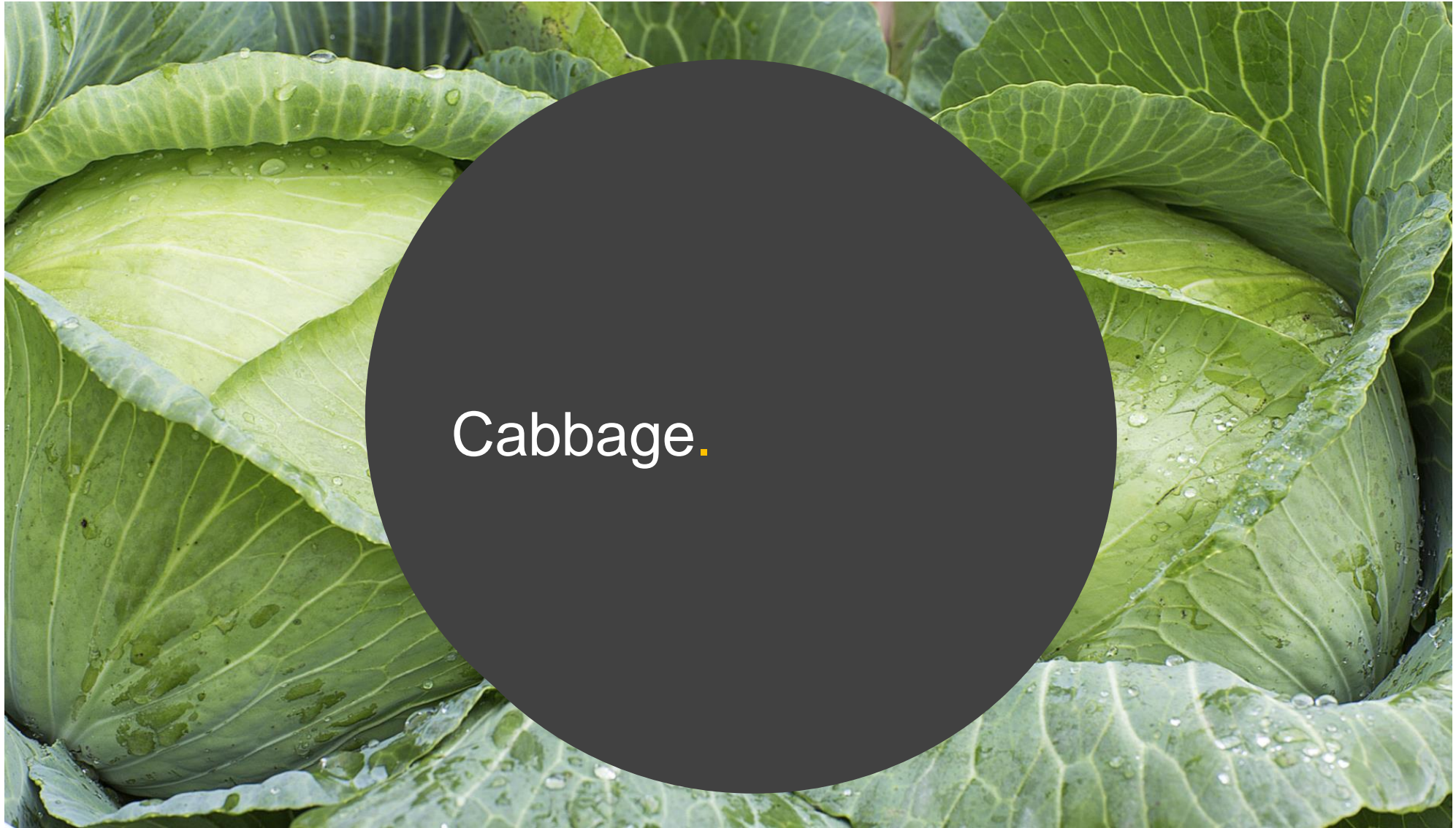
Category health and consumer sentiment remain relatively strong, specifically for satisfaction.

Eggplant, cucumber and radish have strong future purchase intent, with eggplant also having high interest in new varieties.

	Cabbage	Celery	Cucumber	Zucchini	Eggplant	Spring Onion	Radish	Vegetable Average
Importance	6.8	6.5	6.6	6.4	6.2	6.8	6.1	6.4
Satisfaction	7.3	7.0	7.2	6.9	6.6	7.4	6.2	6.7
Endorsement	6.9	6.8	6.9	7.0	7.3	7.2	7.0	7.0
Interest (New Varieties)	6.5	6.1	6.3	6.5	6.9	6.7	6.7	6.4
Future Purchase								
More	19%	10%	21%	12%	25%	12%	20%	16%
Same	81%	88%	78%	86%	73%	87%	78%	83%
Less	1%	2%	2%	2%	1%	1%	2%	1%

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





Cabbage.

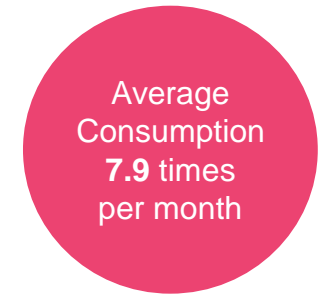


There has been little movement in purchase and consumption frequency of cabbage, remaining relatively consistent with the previous wave.

Cabbage is most likely to be purchased from mainstream retailers. Purchase from Coles and Woolworths have increased over the last three waves.

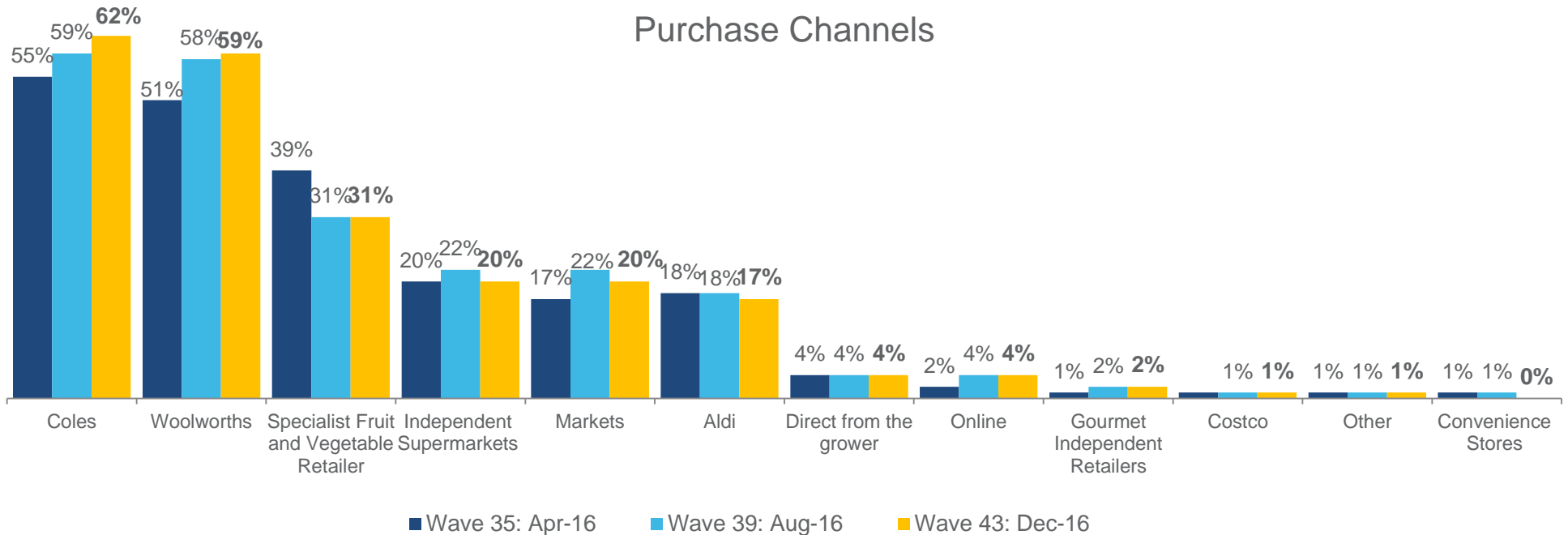


- ▼ 2.9 times, Wave 35
- ▲ 3.5 times, Wave 39



- ▼ 7.5 times, Wave 35
- ▼ 7.8 times, Wave 39

### 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 35 N=307, Wave 39 N=208, Wave 43 N=303



# Average Spend and Price Sensitivity



Average weight of purchase

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

- 1.0kg, Wave 35
- 1.0kg, Wave 39



Recalled last spend

The average recalled last spend was **\$3.20** in December 2016, slightly higher compared to the previous waves.

- ▼ \$3.00, Wave 35
- ▼ \$3.00, Wave 39



Value for money

On average, consumers perceived cabbage to be very good value for money (**6.8/10**), which is relatively consistent with past waves.

- 6.8/10, Wave 35
- ▲ 7.0/10, Wave 39

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 35 N=307, Wave 39 N=208, Wave 43 N=303

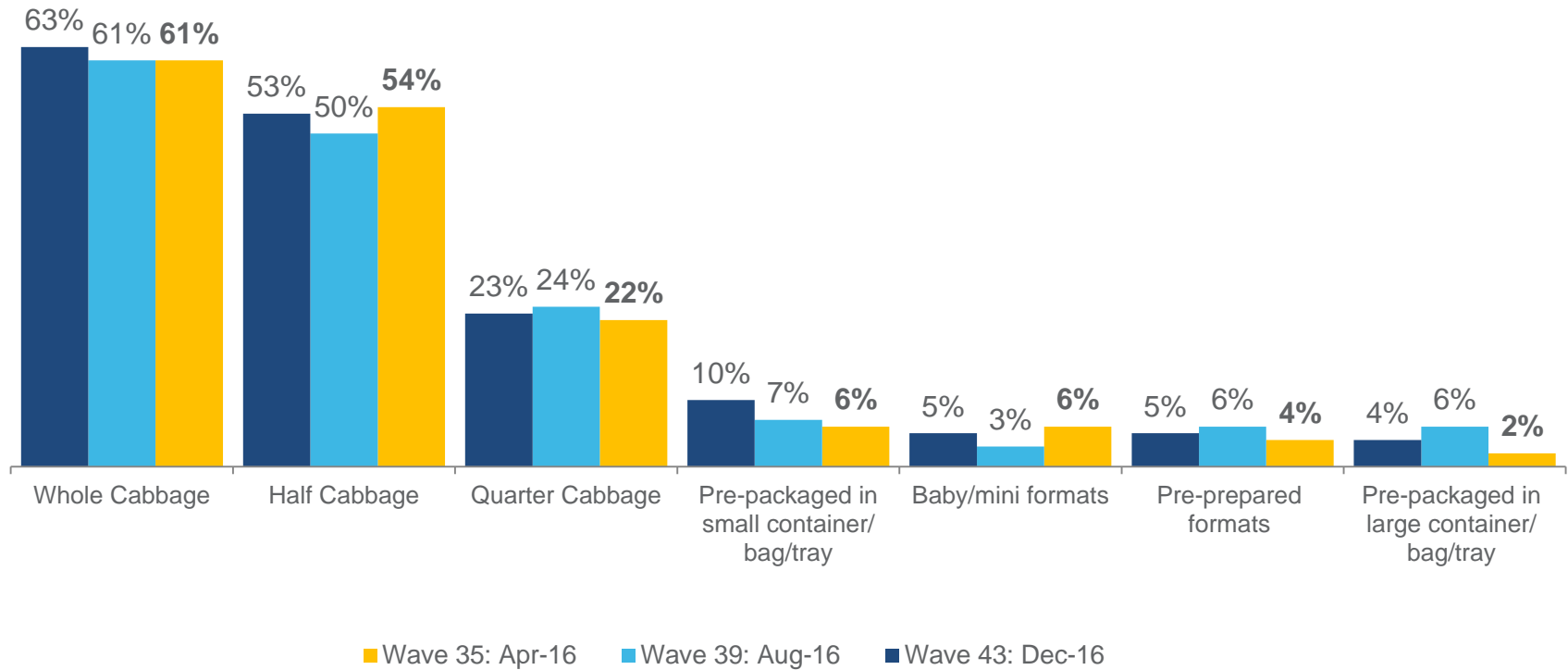


▼ : Indicates LOWER score than current wave.  
 ▲ : Indicates HIGHER score than current wave.





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

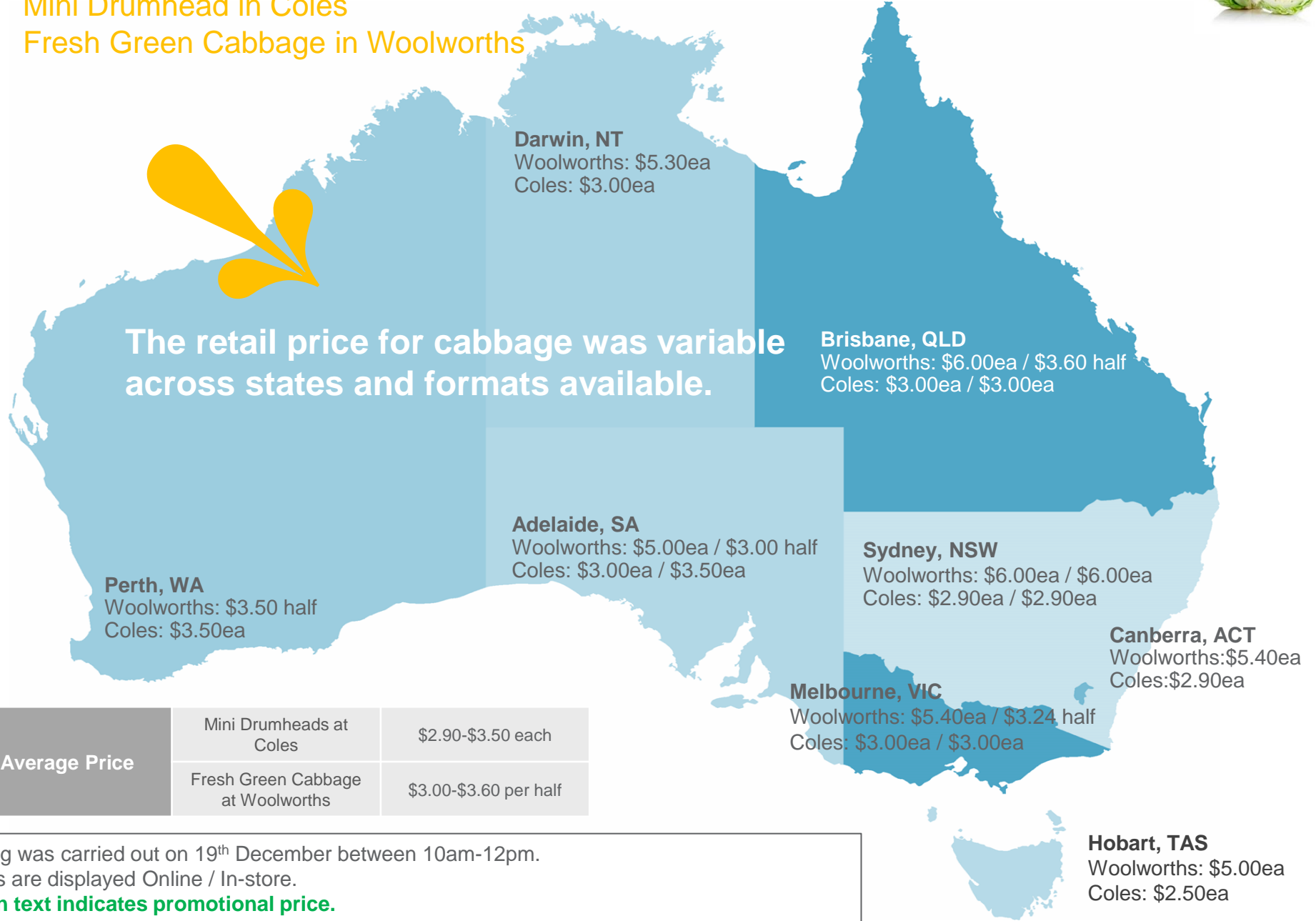


# Online and In-store Commodity Prices



Mini Drumhead in Coles

Fresh Green Cabbage in Woolworths



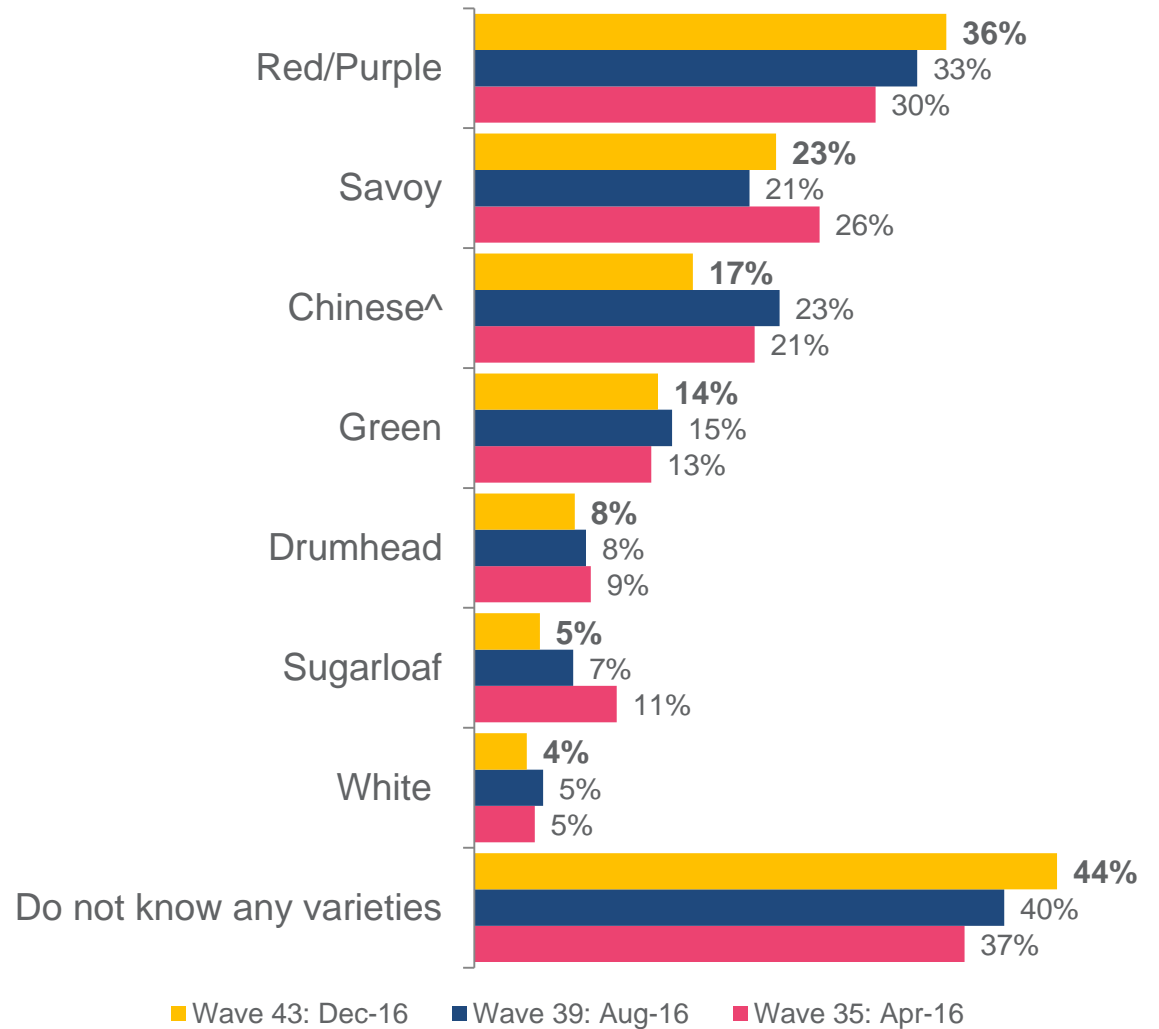
Average Price	Mini Drumheads at Coles	\$2.90-\$3.50 each
	Fresh Green Cabbage at Woolworths	\$3.00-\$3.60 per half

Pricing was carried out on 19<sup>th</sup> December between 10am-12pm.  
 Prices are displayed Online / In-store.  
**Green text indicates promotional price.**



Nearly half of consumers are unable to recall a type of cabbage.

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



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

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

Sample Wave 35 N=307, Wave 39 N=208, Wave 43 N=303

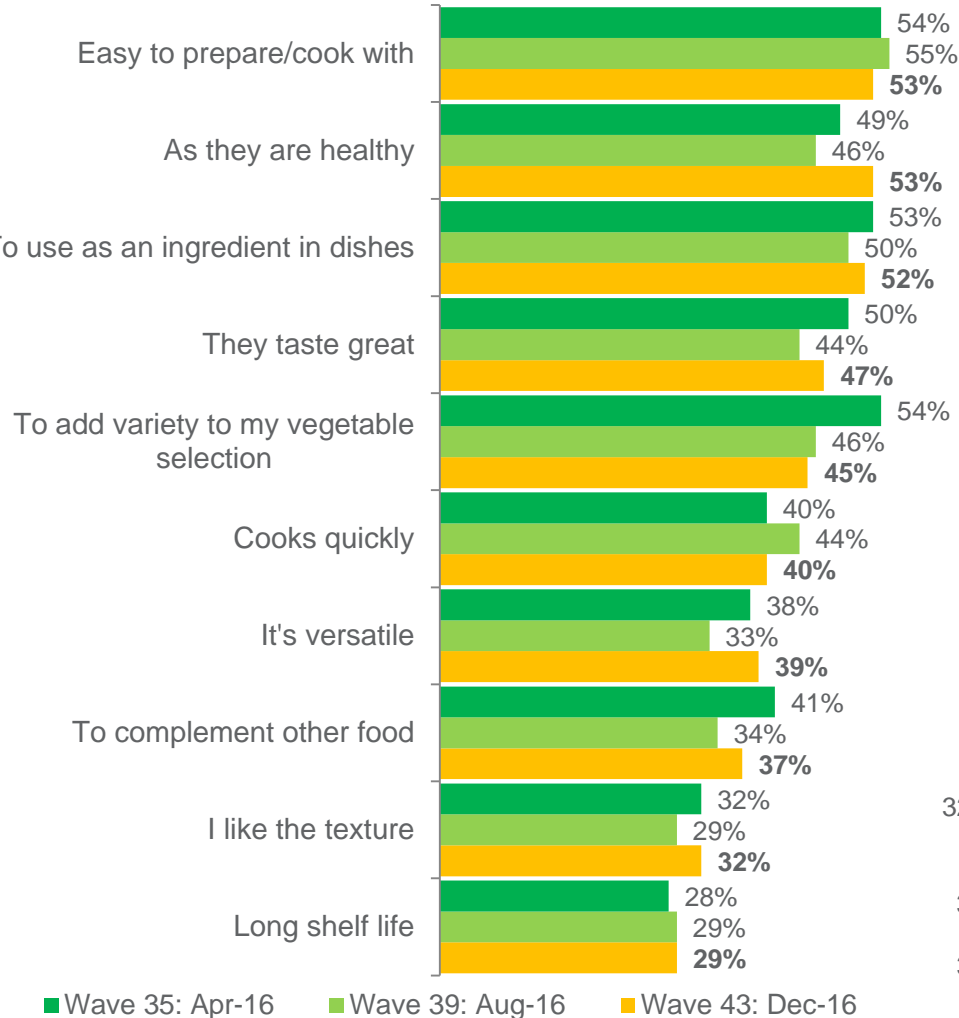




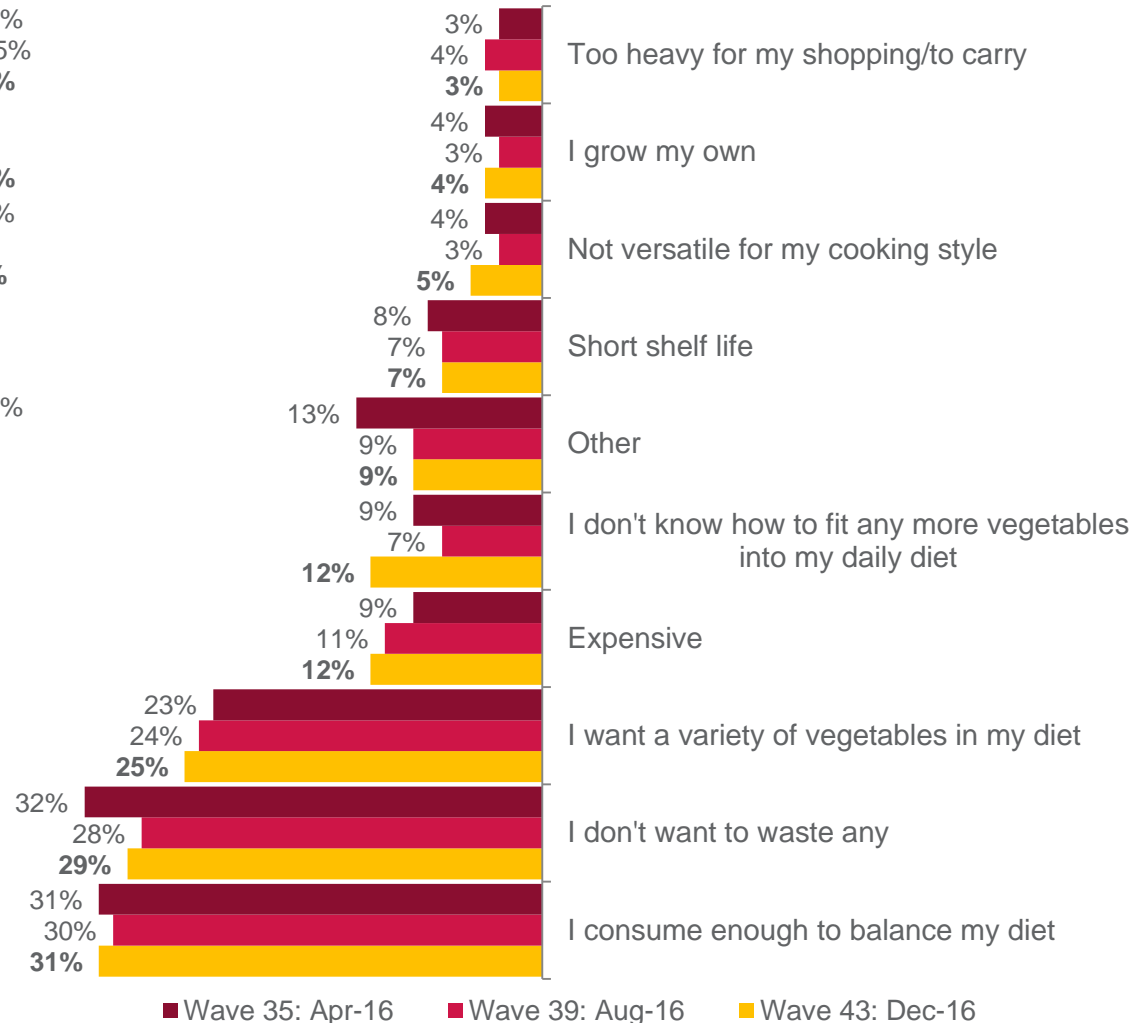
Ease of preparation and health are the main drivers to consumers purchasing cabbage, while already consuming enough and not wanting to waste any are the main barriers inhibiting purchase.



### 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 35 N=307, Wave 39 N=208, Wave 43 N=303



Chinese cuisines are popular when cooking cabbage dishes.

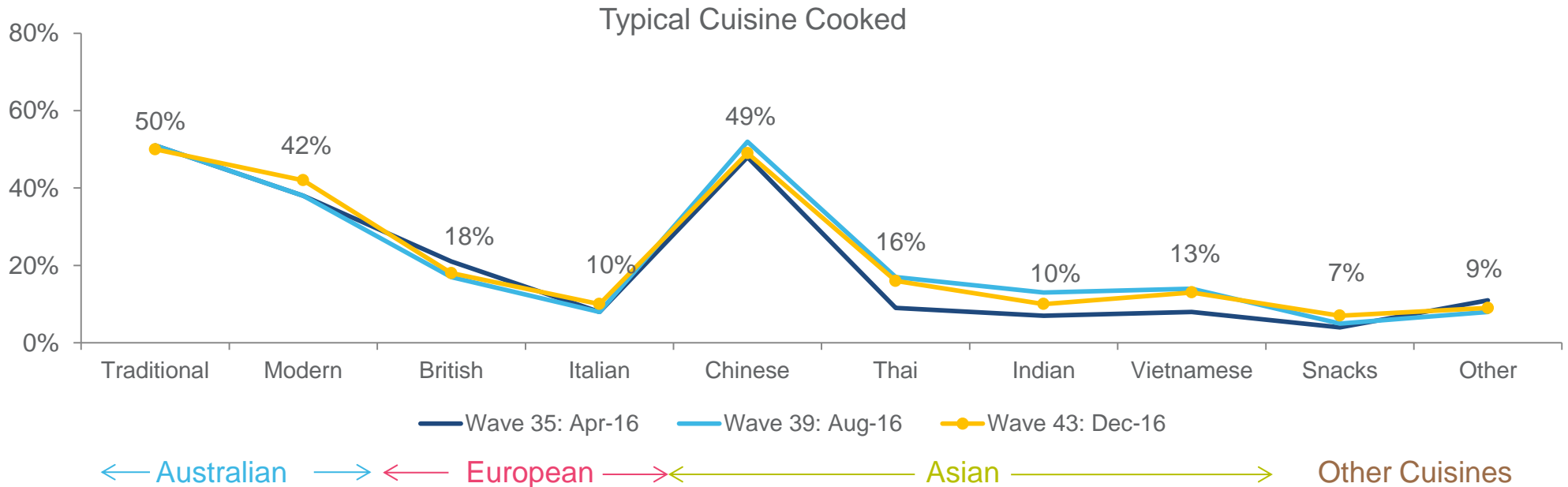
Quick meals has continued to trend upwards as a popular consumption occasion (25% in Wave 35).

### Top 5 Consumption Occasions

	Wave 39	Wave 43
Dinner	69%	<b>75%</b>
Family meals	57%	<b>61%</b>
Weekday meals	44%	<b>47%</b>
Weekend meals	36%	<b>41%</b>
Quick Meals	38%	<b>40%</b>

**16%**  
used cabbage when cooking a new recipe

16%, Wave 39



Q10. What cuisines do you cook/consume that use <commodity>?  
 Q11. Which of the following occasions do you typically consume/use <commodity>?  
 Sample Wave 35 N=307, Wave 39 N=208, Wave 43 N=303

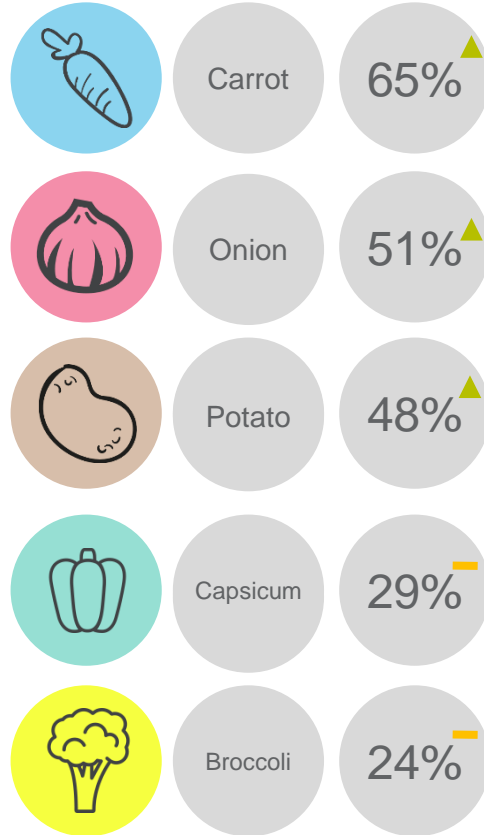


▼ : Indicates LOWER score than current wave.  
 ▲ : Indicates HIGHER score than current wave.



Carrots, onions and potatoes are the main vegetables served with cabbage. Consumers typically stir fry cabbage, which is consistent with past waves.

### Accompanying Vegetables



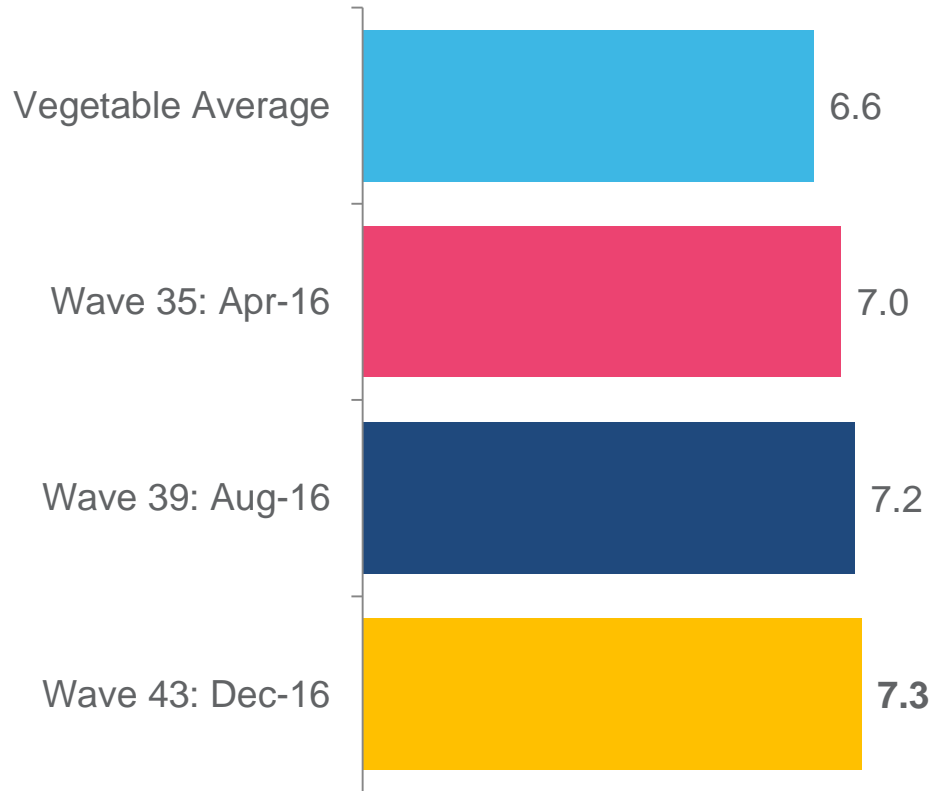
### Top Cooking Styles

	Wave 35	Wave 39	Wave 43
Stir frying	53%	62%	61%
Raw	42%	35%	46%
Steaming	44%	39%	40%
Boiling	41%	35%	28%
Soup	23%	29%	28%
Frying	18%	21%	21%
Sautéing	22%	24%	21%
Slow Cooking	14%	14%	15%
Microwave	10%	9%	10%
Fermenting	2%	4%	4%





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



Q14. When purchasing <commodity>, how important is Provenance to you?  
Q15. And when purchasing Cabbage, how important is that it is grown in Australia?  
Sample Wave 35 N=307, Wave 39 N=208, Wave 43 N=303

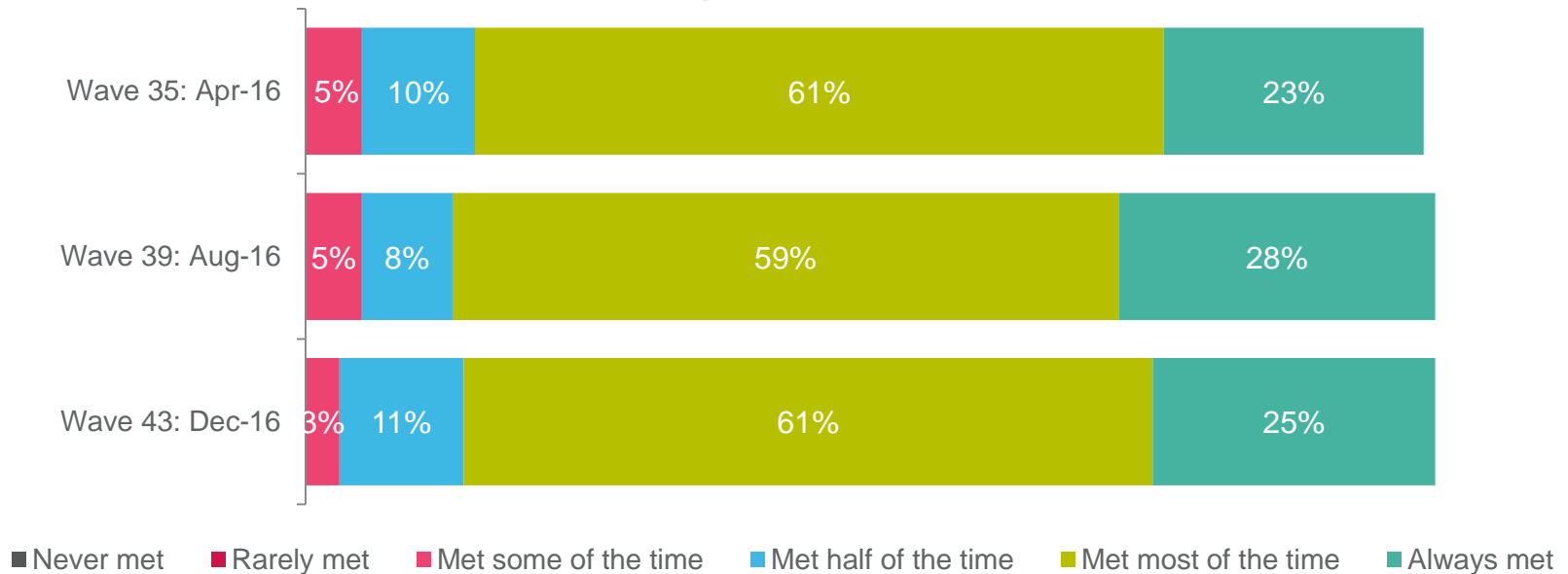


Cabbage is expected to remain fresh for 10 days once purchased. These expectations are being met at least most of the time.

Expected to stay fresh for **10.2 days**

- ▼ 10.1 days, Wave 35
- ▲ 10.3 days, Wave 39

### 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 35 N=307, Wave 39 N=208, Wave 43 N=303

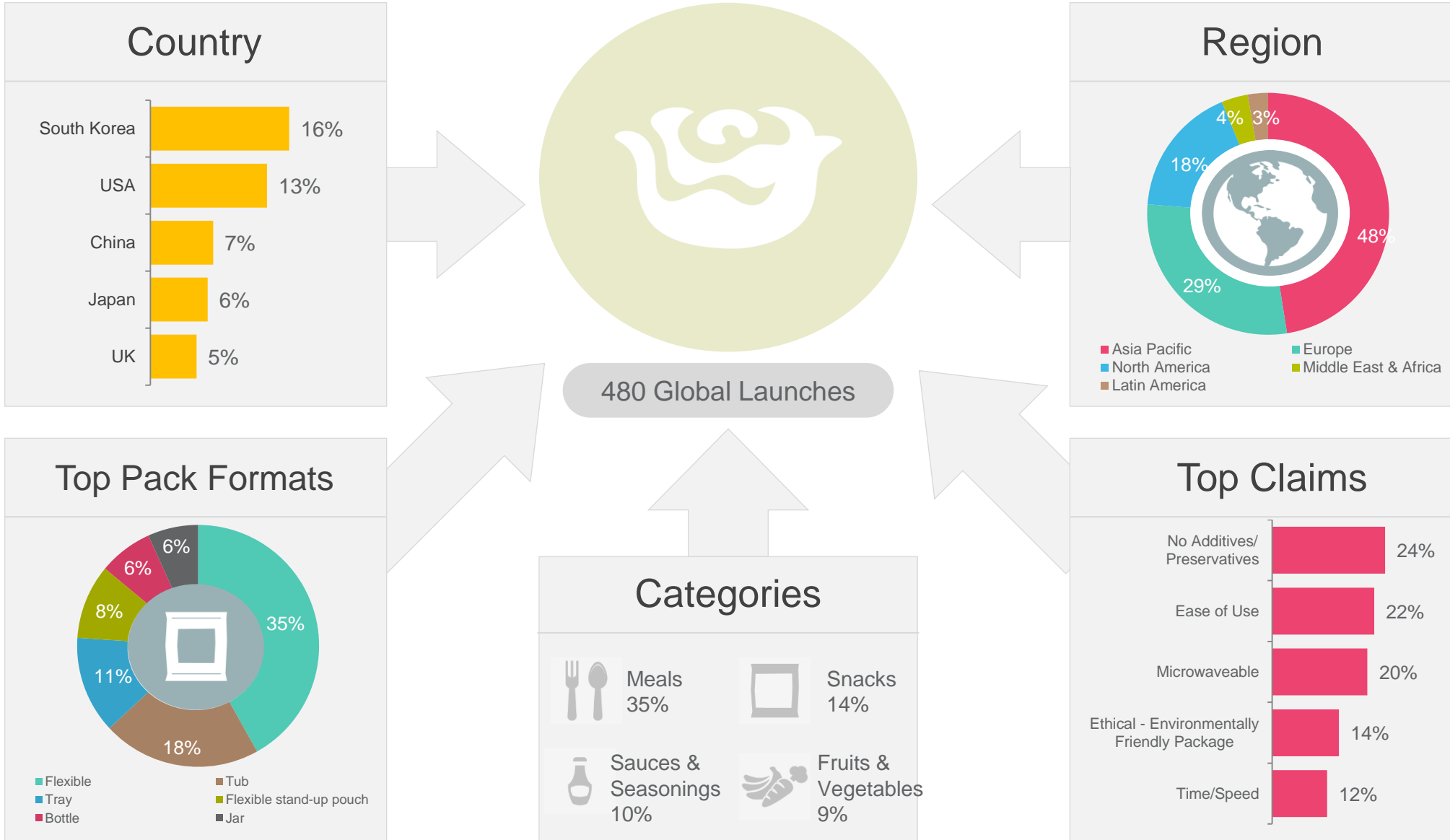


# Trends: Cabbage

# Cabbage Global NPDs

## September – December 2016

There were 480 global launches of products containing cabbage as an ingredient. The majority of launches occurred in Asia Pacific and Europe. No additives/preservatives and ease of use claims were common with products launched. The most commonly launched product were meals and snacks, consistent with previous waves.







# Cabbage Product Launches: Last 3 Months (September – December 2016) Summary

- There were 480 products containing cabbage as an ingredient that were launched globally. This is consistent with the number of launches in the previous wave.
- There were two Australian launches, which is slightly lower than the previous wave (6 launches).
- Asia Pacific (48%) and Europe (29%) were the dominant launch regions for cabbage products. South Korea and USA were the main countries for launches.
- A large proportion of products launched were meals and meal centres (35%). Snacks (14%) and sauces and seasonings (10%) were also common categories for products.
- No additives/preservatives was the top claim utilised (24%). Convenience claims were also common, including ease of use (22%) and microwaveable (20%).
- The most innovative product launched was Mango Juice with Aloe Vera in the USA (see following pages).



Source: Mintel (2016)

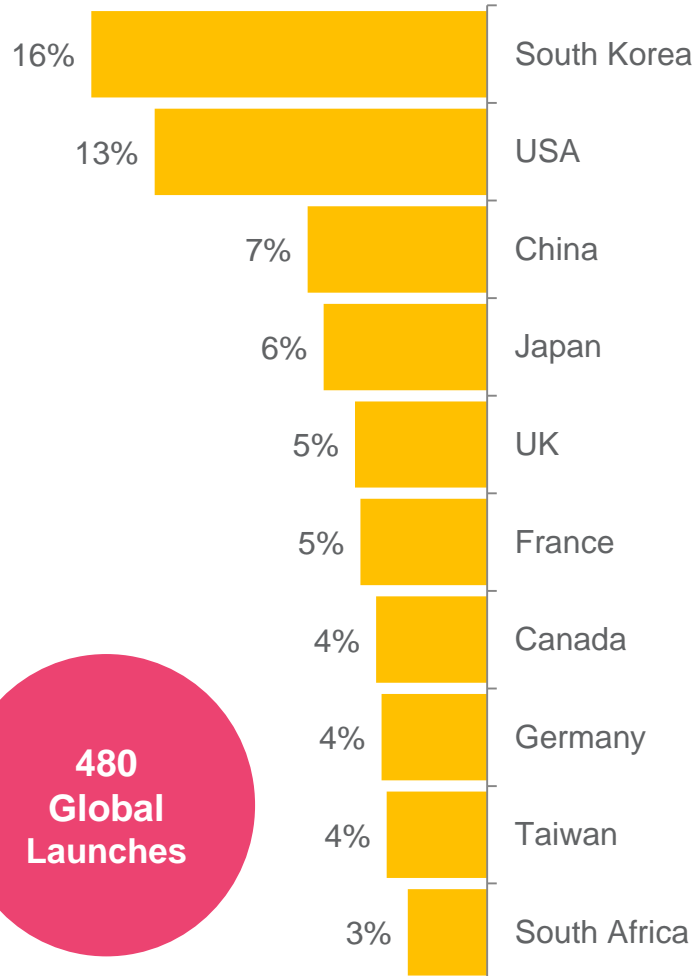


# Cabbage Launches

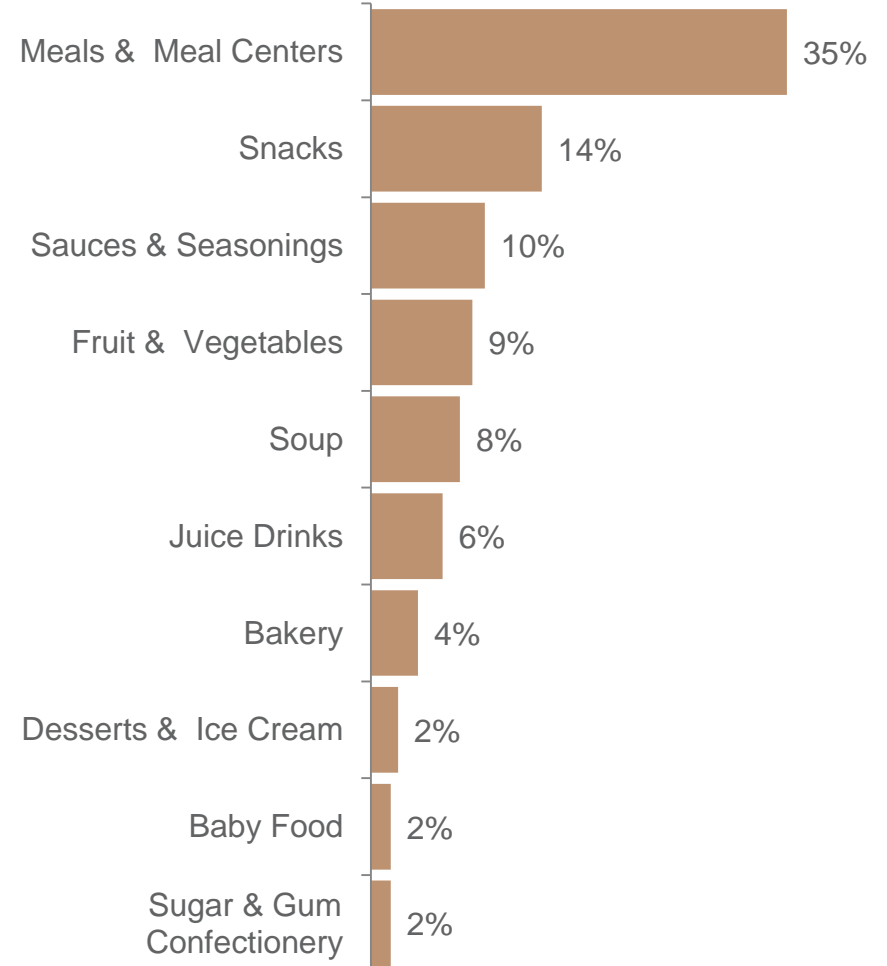
## Country & Categories

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

### Top 10 Launch Countries



### Top 10 Launch Categories












**480**  
Global  
Launches












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

### Pack Formats Used

Global		Flexible	35%
		Tub	18%
		Tray	11%
Asia Pacific		Flexible	44%
		Tub	14%
		Flexible stand-up pouch	12%
Europe		Tub	23%
		Tray	23%
		Flexible	20%

### Top Claims Used

Global		No Additives/Preservatives	24%
		Ease of Use	22%
		Microwaveable	20%
Asia Pacific		No Additives/Preservatives	23%
		Microwaveable	17%
		Ease of Use	14%
Europe		Microwaveable	29%
		No Additives/Preservatives	26%
		Ethical - Environmentally Friendly Package	21%

# ➤➤➤ Innovative Cabbage Launches: L3M (September – December 2016)

## OKF Aloe Vera King Pure Premium Mango Juice with Aloe Vera (USA)

OKF Aloe Vera King Pure Premium Mango Juice with Aloe Vera contains no preservatives or fat. This product is made with 30% aloe and retails in a 16.9-fl. oz. pack featuring Golden Europe Award, Beverage Innovation Award, Superior Taste Award and Gold Award for Monde Selection. The product is said to be world sales number one brand.



**Claims:**  
No Additives/Preservatives,  
Low/No/Reduced Fat, Premium

## Chef Select To Go Spicy Chicken Wrap (Finland)

Chef Select To Go Paneeratulla Broilerinlihaa, Makealla Chilikatikkella Ja Kasviksilla Täytetty Tomaatinmakuinen Vehnätortilla (Spicy Chicken Wrap) is described as a tortilla filled with fried chicken breast, sweet chili sauce and vegetables. The product retails in a 190g pack.



**Claims:**  
On-the-Go

## Morrisons Market St Chinese Stir Fry (UK)

Morrisons Market St Chinese Stir Fry has been relaunched with a new brand name, having been previously available under the M name, and with a new packaging design. It comprises a mix of carrot, bean sprouts, onion, pepper, Chinese leaf, water chestnuts and bamboo shoots. The ready-to-cook, washed and prepared product provides one of the five a day per 80g, is suitable for vegetarians, and retails in a 320g pack.



**Claims:**  
Vegetarian, Ease of Use

## Morrisons A Taste of Asia Chicken Pad Thai (UK)

Morrisons A Taste of Asia Chicken Pad Thai comprises succulent chicken pieces in a savoury tamarind, chilli and lime sauce topped with carrots, savoy cabbage and crisp fried onions. This microwaveable product retails in a 400g partly recyclable pack.



**Claims:**  
Microwaveable, Ethical - Environmentally Friendly Package

# ➤➤➤ Innovative Cabbage Launches: L3M (September – December 2016)

## Aro Frozen Takoyaki (Thailand)

Aro Frozen Takoyaki can be microwaved or fried in hot oil. This Japanese style product retails in a 1000g pack containing 50 x 20g pieces.



**Claims:**  
Microwaveable, Economy

## Lawson 108 Cos Lettuce Carrot Salad (Thailand)

Lawson 108 Cos Lettuce Carrot Salad is now available. The product retails in an 80g pack.



**Claims:**  
N/A

## Asda Grower's Selection Layered Veg with Mint Butter (UK)

Asda Grower's Selection Layered Veg with Mint Butter comprises a crisp mix of peas, broccoli, courgettes, leeks and savoy cabbage with a mint butter. This microwaveable product is suitable for vegetarians, contains no artificial colours, flavours or hydrogenated fat, and retails in a partly recyclable 285g pack.



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

## CJ CheilJedang Freshian Direct Fired White Spicy Seafood Noodle Soup (South Korea)

CJ CheilJedang Freshian Direct Fired White Spicy Seafood Noodle Soup is said to be frozen at -35°C and provide the restaurant's taste, that features a harmony of a refreshing taste and a hot taste of Korean cheongyang chilli. This ready to eat product is easy to prepare by boiling in ten minutes. and retails in a 488g pack.



**Claims:**  
Ease of Use



# »»» Innovative Cabbage Launches: L3M (September – December 2016)

## Coop Klar Til At Spise Pasta Salad with Sweet Chili and Prawns (Denmark)

Coop Klar Til At Spise Måltidssalat med Kæmpe Rejer med Pasta og Sød Chili (Pasta Salad with Sweet Chili and Prawns) is described as satiated, easy and delicious. It comprises 385g of mixed salad with prawns, 60g of dressing, and 5g of sesame seeds. The product is ready-to-eat, is recommended for on-the-go, and it retails in a 450g pack bearing a Farmed Responsibly ASC Certified logo.



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

## Skin Food Bitter Green Toner & Mask (Thailand)

Skin Food Bitter Green Anti-Dust & Purifying Toner & Mask is described as a two-in-one product, which is a fourth step in a facial skincare regime, after cleansing. The formula features mixed five kinds of bitter food extracts, which are rich in fiber and vitamins, such as wheat sprout, kale, celery, cabbage and broccoli, to deliver effective anti-dust and purifying action, eliminating waste from the body, and delivering rich moisture to rough, dry skin, leaving it healthy and clear.



**Claims:**  
Botanical/Herbal, Moisturising / Hydrating,  
Cleansing\*, Toning

## Compliments Garden Vegetable Cheese Ball (Canada)

Compliments Garden Vegetable Cheese Ball contains 23% fat and 46% moisture. The product retails in a 227g pack.



**Claims:**  
N/A

## Delhaize Str.EAT Food Chinese Style Chicken Bao Bun (Belgium)

Delhaize Str.EAT Food Pain au Poulet (Chinese Style Chicken Bao Bun) is now available. The product comprises marinated chicken and atjar in a steamed bun. It can be microwaved in two and a half minutes and retails in a 250g pack.



**Claims:**  
Microwaveable



# Australian Cabbage Launches: L3M (September – December 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

## Sandhurst Quinoa & Co. Red Quinoa with Piquillo Pepper, Cabbage & Lentil

Sandhurst Quinoa & Co. Red Quinoa with Piquillo Pepper, Cabbage & Lentil is ready to eat. This gluten-free product can be microwaved, and retails in a 210g pack.



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



Celery.





Celery is consumed on average ten times per month, which has increased this wave. Purchase frequency remains stable.

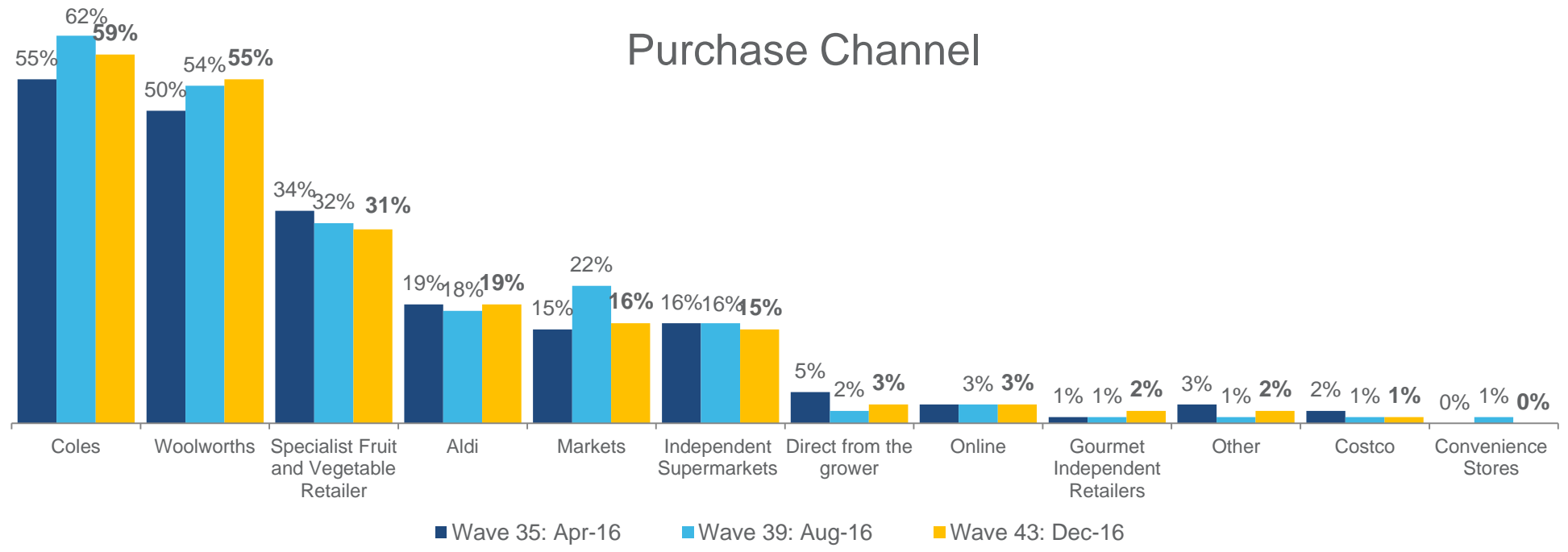
Coles is the key retail channel for celery purchase. There is an upwards trend in purchase from Woolworths over the last three waves.



▼ 2.9 times, Wave 35  
▲ 3.3 times, Wave 39

▼ 8.9 times, Wave 35  
▼ 9.0 times, Wave 39

### 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 35 N=310, Wave 39 N=304, Wave 43 N=311



# Average Spend and Price Sensitivity



Average weight of purchase

The average consumer typically purchases **900g** of celery, slightly higher than the previous two waves.

- ▼ 800g, Wave 35
- ▼ 800g, Wave 39



Recalled last spend

The average recalled last spend on celery was **\$2.90**, which is consistent with the previous wave.

- ▼ \$2.80, Wave 35
- \$2.90, Wave 39



Value for money

On average, consumers perceive celery to be good value for money (**6.6/10**), which has increased this wave.

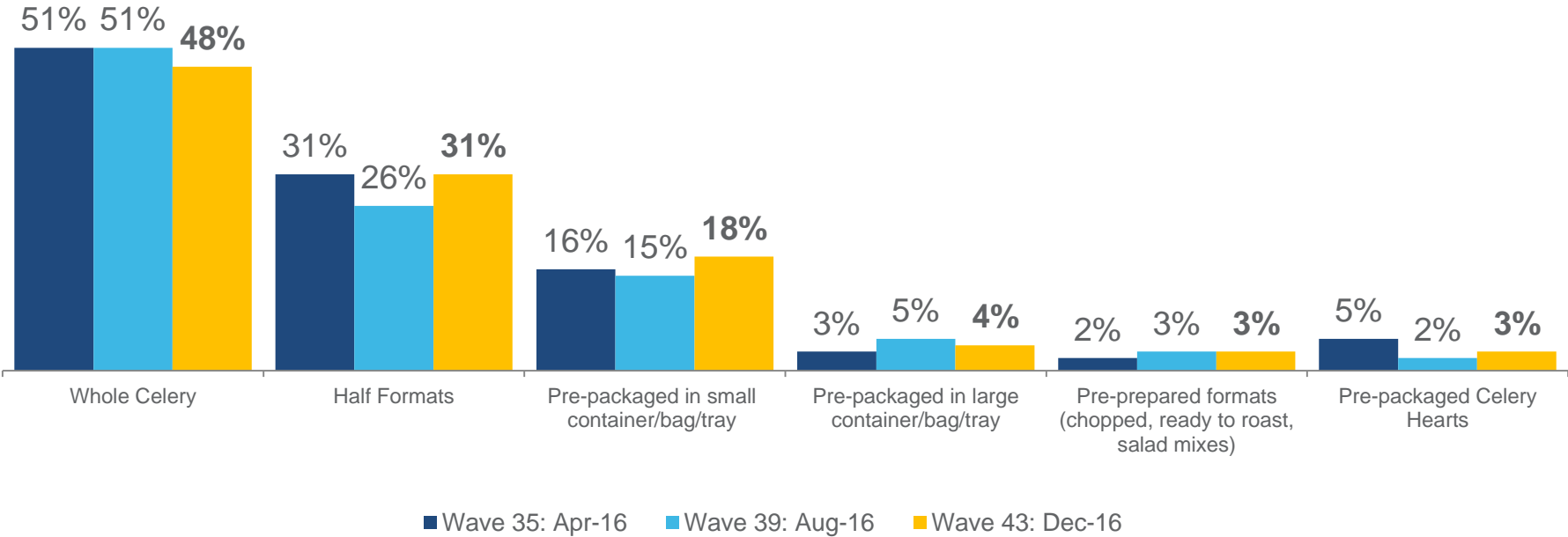
- ▲ 6.7/10, Wave 35
- ▼ 6.4/10, Wave 39

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 35 N=310, Wave 39 N=304, Wave 43 N=311





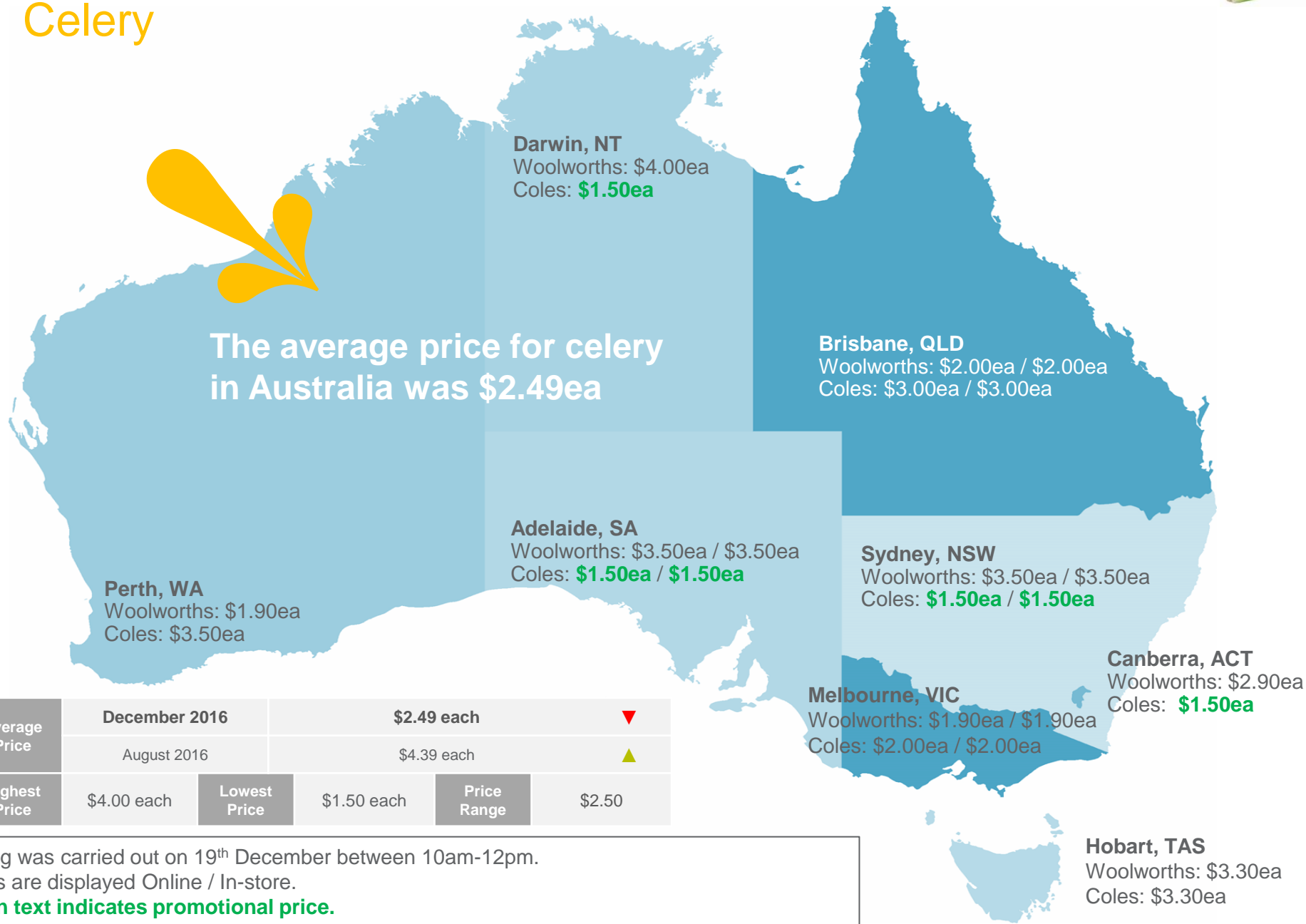
Approximately half of consumers purchase whole celery formats. Half and pre-packaged options are also popular formats.



Q4b In what fresh formats do you typically purchase Celery?  
Sample Wave 35 N=310, Wave 39 N=304, Wave 43 N=311

# Online and In-store Commodity Prices

## Celery



Average Price	December 2016	\$2.49 each				▼
	August 2016	\$4.39 each				▲
Highest Price	\$4.00 each	Lowest Price	\$1.50 each	Price Range	\$2.50	

Pricing was carried out on 19<sup>th</sup> December between 10am-12pm.  
 Prices are displayed Online / In-store.  
**Green text indicates promotional price.**



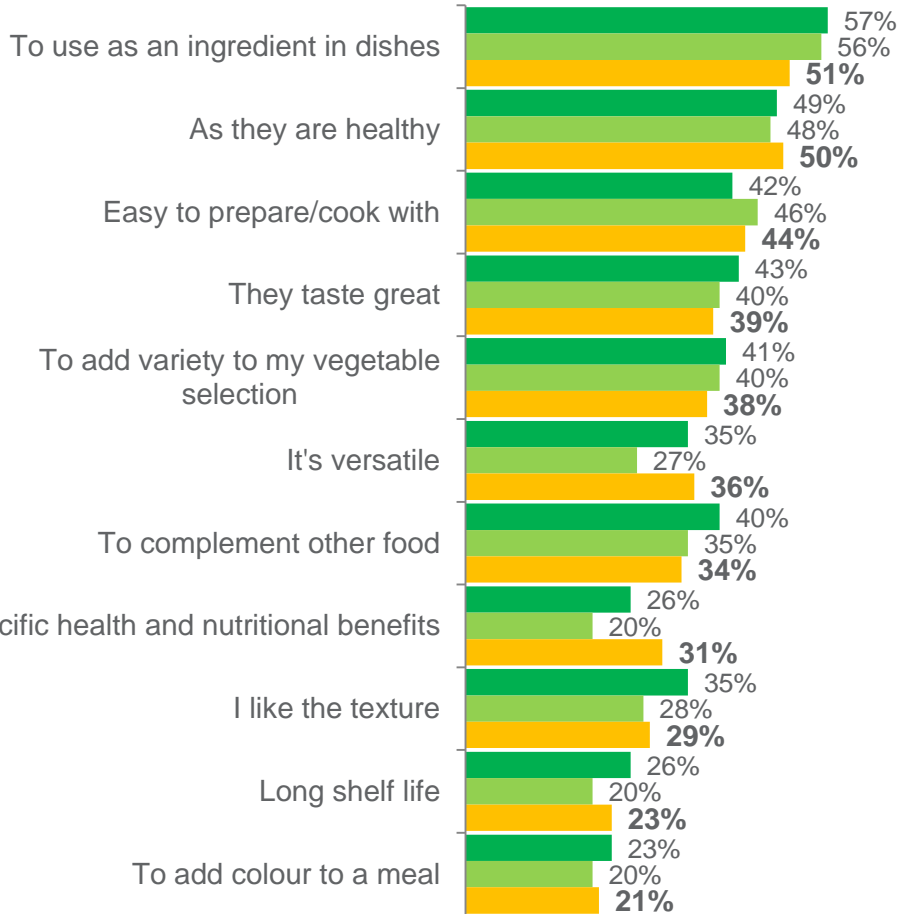
Spontaneous awareness of celery varieties remains very low, with 81% of consumers unable to recall a type.





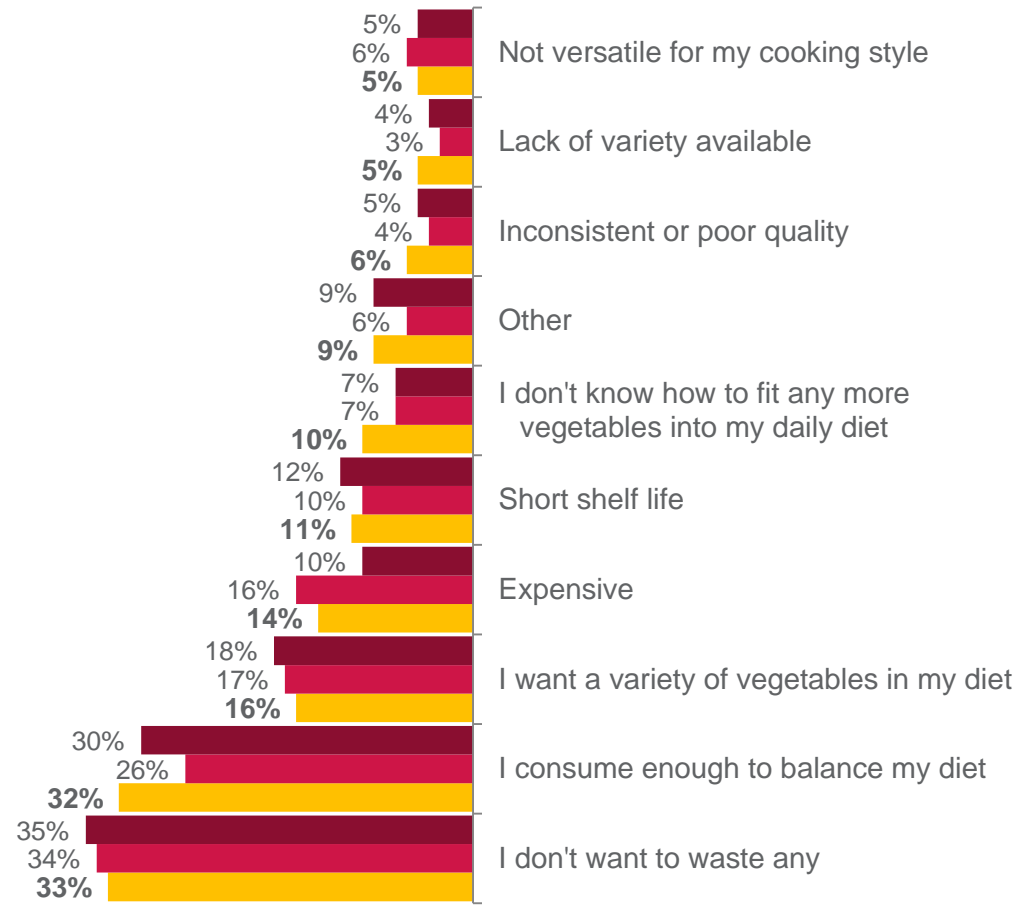
Use as an ingredient, health and ease of preparation remain the key triggers of purchase. In contrast, not wanting to waste any and already consuming enough are the barriers preventing future purchase.

### Triggers



■ Wave 35: Apr-16 ■ Wave 39: Aug-16 ■ Wave 43: Dec-16

### Barriers



■ Wave 35: Apr-16 ■ Wave 39: Aug-16 ■ Wave 43: Dec-16

Q7. Which of the following reasons best describes why you purchase <commodity> ?  
Q8. Which reason best describes why you don't buy <commodity> more often?  
Sample Wave 35 N=310, Wave 39 N=304, Wave 43 N=311



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

Dinner remains the predominant occasions for celery consumption.

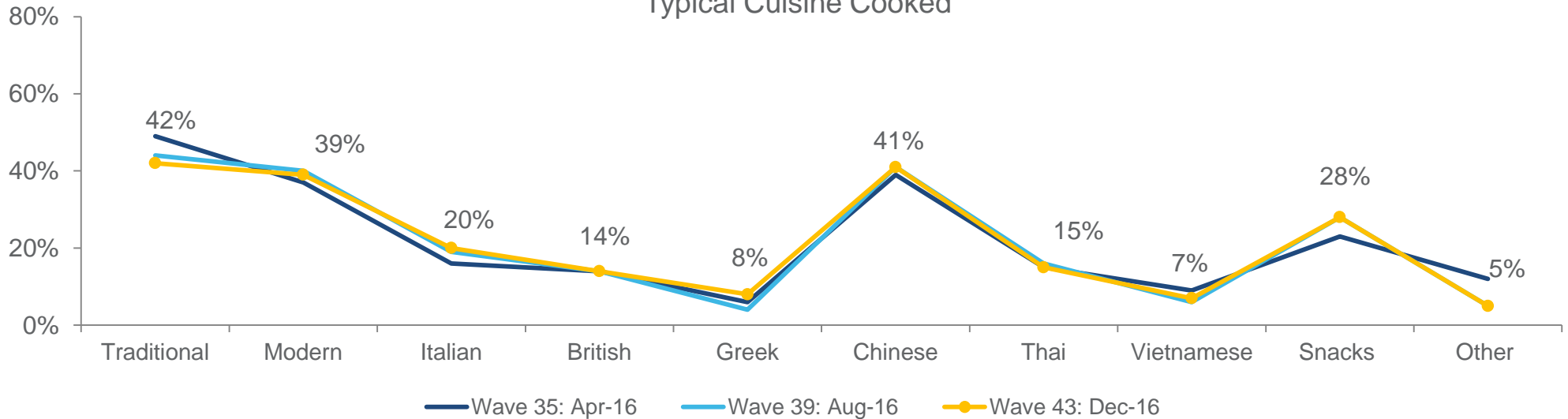
### Top 5 Consumption Occasions

	Wave 39	Wave 43
Dinner	59%	57%
Family meals	49%	48%
Weekday meals	47%	42%
Quick Meals	38%	41%
Lunch	32%	40%

**12%** used celery when cooking a new recipe

▲ 15%, Wave 39

### Typical Cuisine Cooked



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



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

Q10. What cuisines do you cook/consume that use <commodity> ?  
Q11. Which of the following occasions do you typically consume/use <commodity> ?  
Sample Wave 35 N=310, Wave 39 N=304, Wave 43 N=311

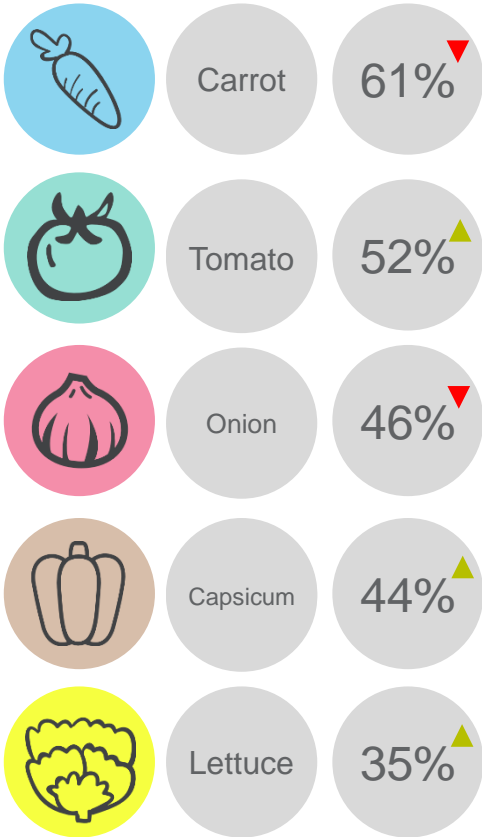




Carrot, tomato and onion are typically served with celery. Celery is more likely to be consumed raw, stir fried or cooked in soups.



Accompanying Vegetables



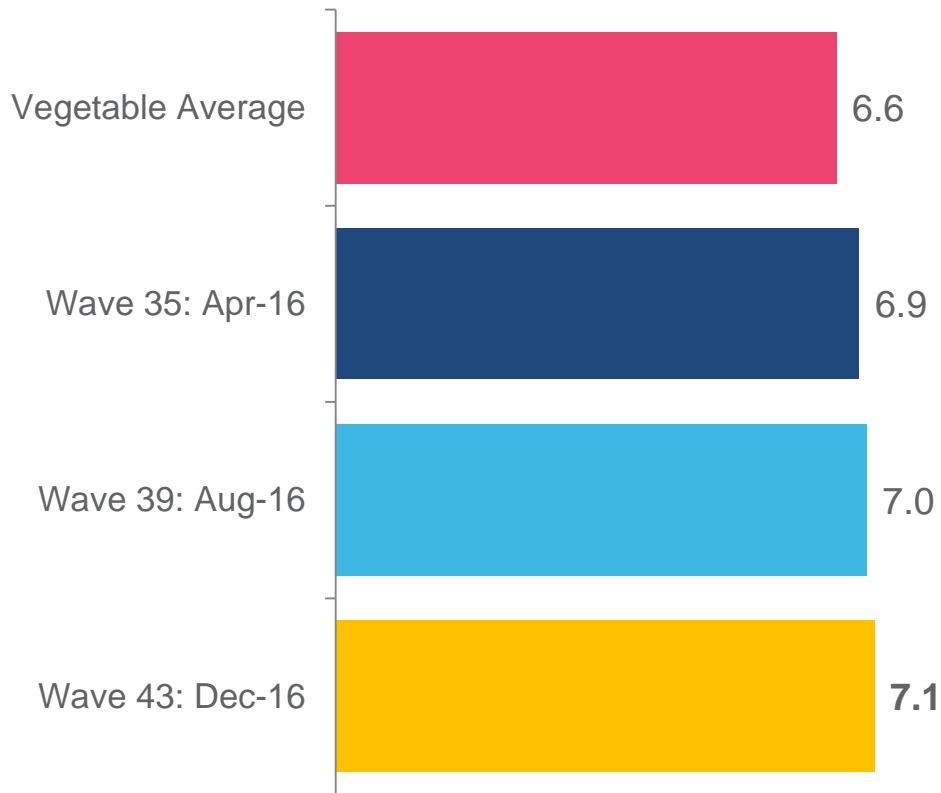
Top Cooking Styles

	Wave 35	Wave 39	Wave 43
Raw	60%	58%	62%
Stir frying	54%	53%	50%
Soup	53%	51%	43%
Slow Cooking	28%	29%	24%
Sautéing	15%	15%	15%
Steaming	10%	9%	12%
Frying	7%	12%	9%
Boiling	9%	10%	8%
Other	7%	3%	6%
Microwave	3%	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 35 N=310, Wave 39 N=304, Wave 43 N=311



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



Q14. When purchasing <commodity>, how important is Provenance to you?  
Q15. And when purchasing Celery, how important is that it is grown in Australia?  
Sample Wave 35 N=310, Wave 39 N=304, Wave 43 N=311



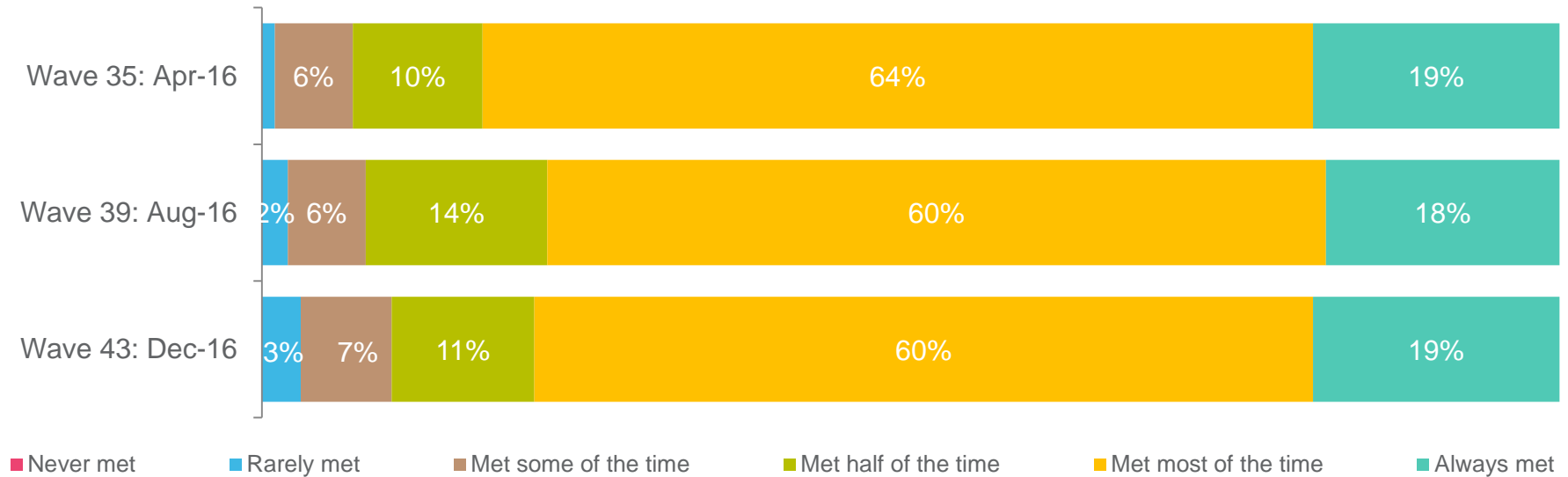
Celery is expected to remain fresh for ten days after purchase, relatively consistent with previous waves.

The likelihood of freshness expectations being met has remained stable.

Expected to stay fresh for **10.3 days**

- ▲ 10.4 days, Wave 35
- ▼ 10.2 days, Wave 39

### 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 35 N=310, Wave 39 N=304, Wave 43 N=311



# Trends: Celery



# Celery Global NPDs

## September – December 2016

There were 1100 products containing celery launches in the past three months. Launches primarily occurred in Europe. USA and Germany were the most popular launch countries. Categories for launch were meals, sauces and processed products.







## Celery Product Launches: Last 3 Months (September – December 2016) Summary

- Consistent with previous trends, a large number of products (N=1100) containing celery as an ingredient were launched globally in the last three months.
- There were 17 products launched in Australia, lower than the previous wave (28 launches).
- The majority of launches occurred in Europe (53%). Key countries for launch were USA and Germany.
- Flexible packaging (21%) and trays (16%) were the main packaging types used for products.
- Meals (23%), sauces and seasoning (21%), and processed products (17%) were the main categories for launches.
- Core claims used were no additives or preservatives (30%) and microwavable (26%).
- The most innovative product launch this wave was an Fruit Chutney Gourmet Popcorn from South Africa. Examples of other innovative launches can be found on the following pages.



Source: Mintel (2016)

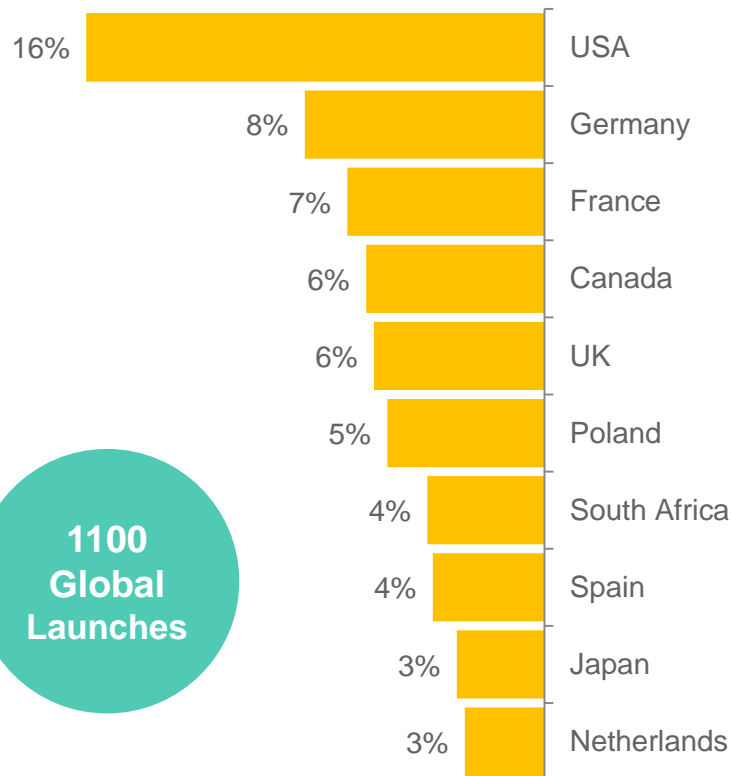




# Celery Launches

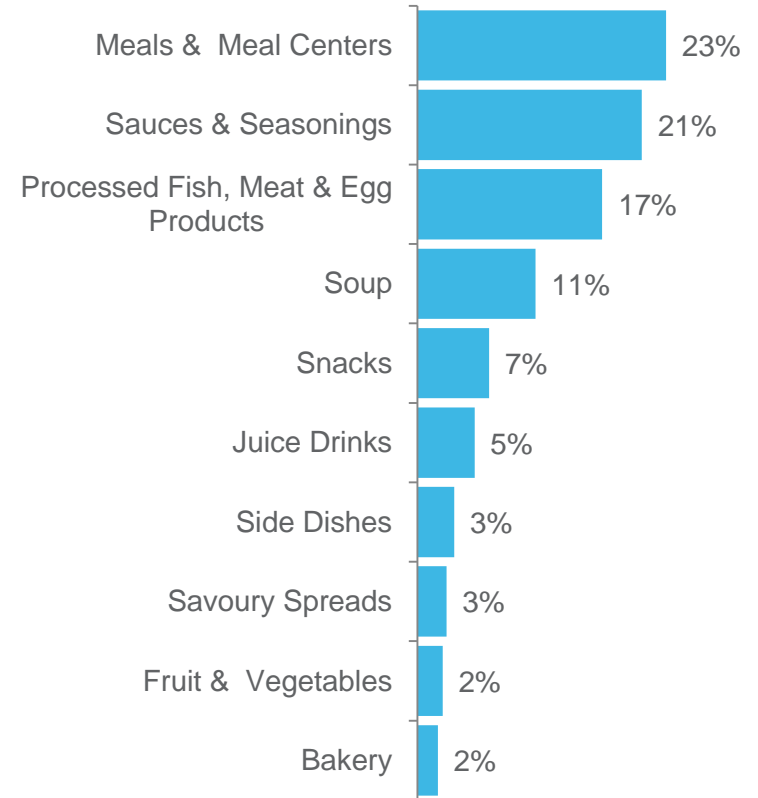
- ➔ USA and Germany continue to produce the greatest number of products containing celery.
- ➔ Meals, sauces & seasonings, processed products and soups are the main categories for products launched.

## Top Launch Countries



1100  
Global  
Launches










## Top Launch Categories














No additives/preservatives and microwaveable remain the most used claim on celery products. Flexible packaging is most utilised globally, however trays appear the most popular format in Europe, and skinpack is most popular in North America.

### Pack Formats Used

Global		Flexible	21%
		Tray	16%
		Jar	12%
Europe		Tray	20%
		Flexible	20%
		Tub	13%
North America		Skinpack	17%
		Flexible	15%
		Jar	14%

### Top Claims Used

Global		No Additives/Preservatives	30%
		Microwaveable	26%
		Ethical - Environmentally Friendly Package	21%
Europe		No Additives/Preservatives	25%
		Microwaveable	24%
		Ethical - Environmentally Friendly Package	19%
North America		No Additives/Preservatives	40%
		Low/No/Reduced Allergen	36%
		Gluten-Free	36%



# »»» Innovative Celery Launches: L3M (September – December 2016)

## Woolworths Food Vegetarian Moroccan Patties (South Africa)

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



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

## Røros RørosOst Cheese with Spices (Norway)

Røros RørosOst Ost med Krydder (Cheese with Spices) is produced in Galåvolden farm, which produces farm food from Røros area. The product retails in a 270g pack bearing the Spesialitet Unik Smak logo.



**Claims:**  
Cobranded

## Leader Price Preserved Celery (France)

Leader Price Coeurs de Céleris (Preserved Celery) is now available. The product retails in an 800g recyclable pack.



**Claims:**  
Ethical - Environmentally Friendly Package

## M&S Made Without Wheat Spaghetti Bolognese (France)

M&S Made Without Wheat Spaghetti Bolognese is described as an Italian gluten-free spaghetti with a rich, meaty Bolognese made using a traditional Italian soffritto method. The microwavable and freezable product is made with assured beef from farms in the UK, and retails in a 400g recyclable pack featuring the FSC logo.



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

# »»»→ Innovative Celery Launches: L3M (September – December 2016)

## Hak Pea Mix for Soup (Netherlands)

Hak Erwtentmix 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

## Campbell's Slow Kettle Style Mediterranean Vegetable Soup with Kale & Orzo (USA)

Campbell's Slow Kettle Style Mediterranean Vegetable Soup with Kale & Orzo is claimed to have high quality ingredients and delicious flavor combinations. The microwaveable product is partially made with genetic engineering, is free from preservatives and retails in a 15.5-oz. pack.



**Claims:**  
No Additives/Preservatives, Microwaveable

## Baker Street Snacks Jumpin Jack Fruit Chutney Gourmet Popcorn (South Africa)

Baker Street Snacks Jumpin Jack Fruit Chutney Gourmet Popcorn is free from trans fat and tartrazine and is high in dietary fibre. The halal certified product is said to be fluffy and retails in a 100g pack.



**Claims:**  
High/Added Fiber, Halal, Low/No/Reduced Transfat

## Blount Organic Organic Vegetarian Chili (USA)

Blount Organic Organic Vegetarian Chili is now available. The USDA organic certified soup is free from genetically engineered ingredients and gluten, and is suitable for a vegetarian diet. The microwaveable product retails in a 16-oz. pack.



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

# »»» Innovative Celery Launches: L3M (September – December 2016)

## Kitchenette Potato-Spinach Casserole with Feta (Germany)

Kitchenette Kartoffel-Spinat-Auflauf mit Feta (Potato-Spinach Casserole with Feta) is free from flavour enhancers and added flavours. The product can be prepared in the oven or the microwave. It retails in a 400g pack featuring preparation instructions and serving suggestions.



**Claims:**  
No Additives/Preservatives, Microwaveable

## M&S Gastropub The Collection Peppercorn Beef (Ireland)

M&S Gastropub The Collection Peppercorn Beef comprises slow cooked British Jacob's ladder beef with parsnips, carrots and celeriac. The ready to cook main course for one is made with M&S assured beef, is suitable for freezing and retails in a 300g pack.



**Claims:**  
Ethical - Animal, Ease of Use

## Kharis Snack Celery Sticks (Indonesia)

Kharis Snack Stick Seledri (Celery Sticks) are described as healthy and nutritious. The product retails in a 150g pack.



**Claims:**  
N/A

## Wheaty Vegan Kebab Gyros (France)

Wheaty Végé Poêlée à la Grecque (Vegan Kebab Gyros) is now available. This vegetal and organic product is formulated with seitan, and is free from lactose and eggs. It can be prepared in three to five minutes, and retails in a 200g pack bearing the Vegan and EU Green Leaf logos.



**Claims:**  
Organic, Low/No/Reduced Allergen, Vegan, No Animal Ingredients, Low/No/Reduced Lactose





# Australian Celery Launches: L3M (September – December 2016)

**Fettayleh Small Goods Turkey Roll  
Chilli**



**Latina Fresh Lasagne with Angus Beef  
& Vegetables**



**Sandhurst Quinoa & Co. Mixed Quinoa  
with Eggplant Caponata**



**Chiko Mini Chicken Kievs**

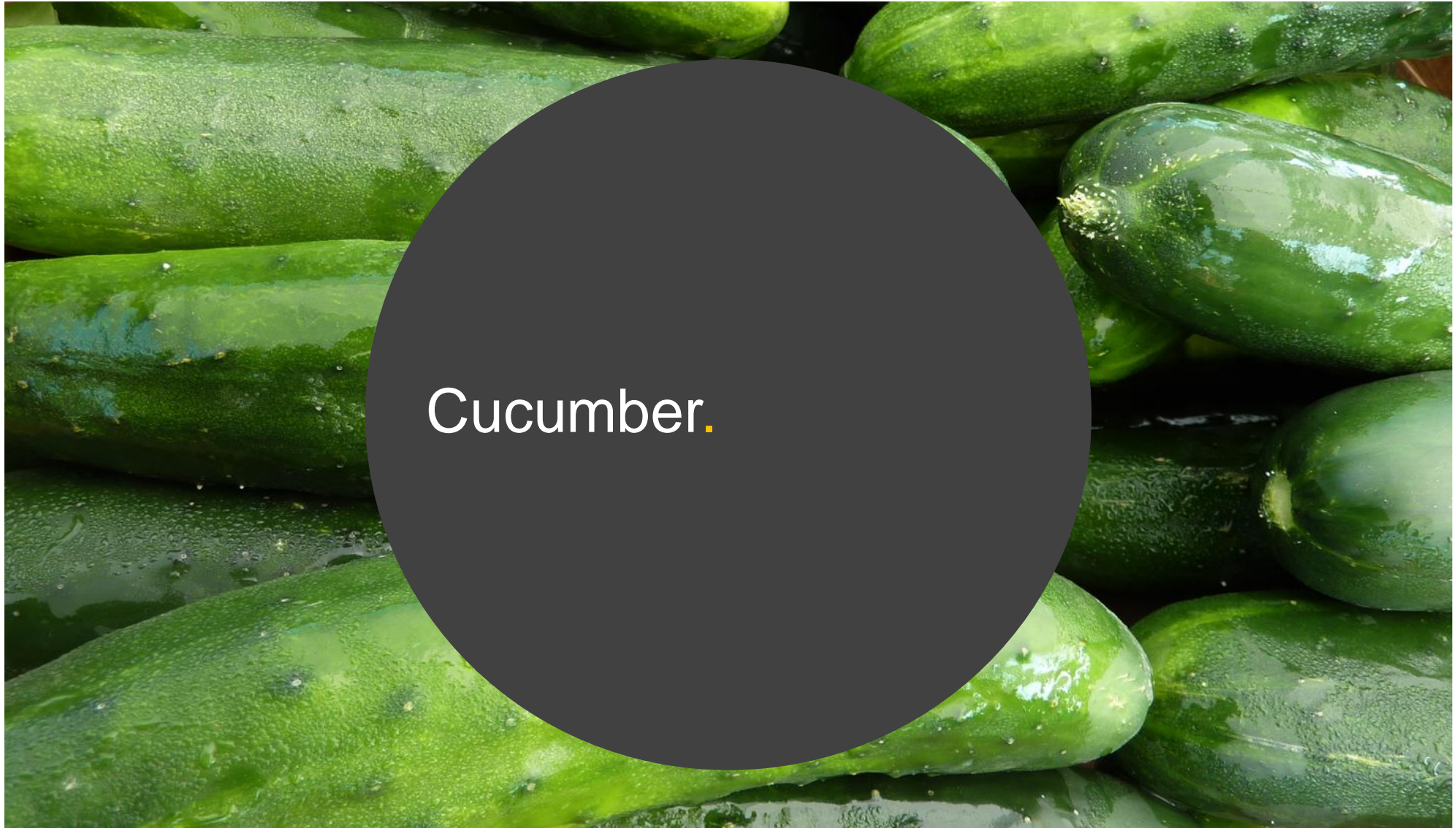


**The Real Hotpot Aussie Angus Beef &  
Ale**



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





Cucumber.





# Average Spend and Price Sensitivity



Average weight of purchase

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

- 700g, Wave 35
- 700g, Wave 39



Recalled last spend

The average recalled last spend is **\$2.80**, which remains relatively consistent with the previous wave.

- \$2.80, Wave 35
- \$3.00, Wave 39



Value for money

On average, consumers perceive cucumber to be good value for money (**6.7/10**), which has increased from the previous wave.

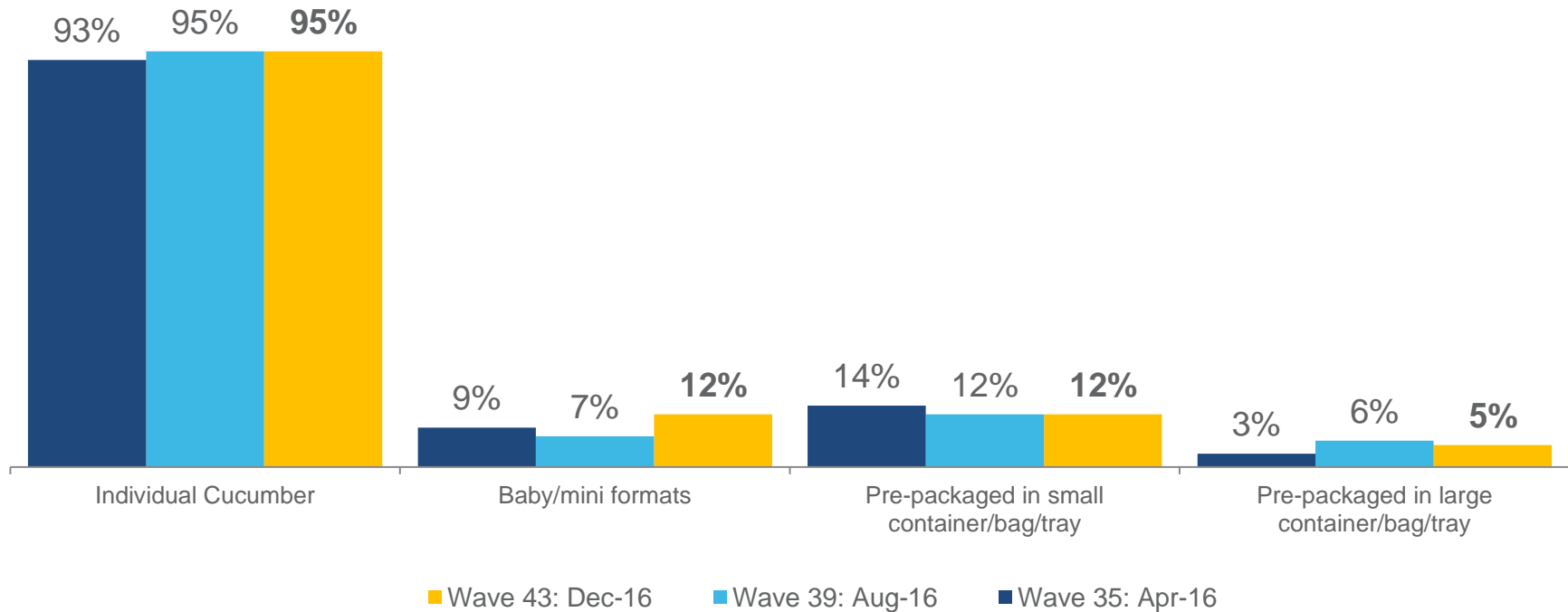
- 6.6/10, Wave 35
- 6.4/10, Wave 39

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 35 N=310, Wave 39 N=303, Wave 43 N=310





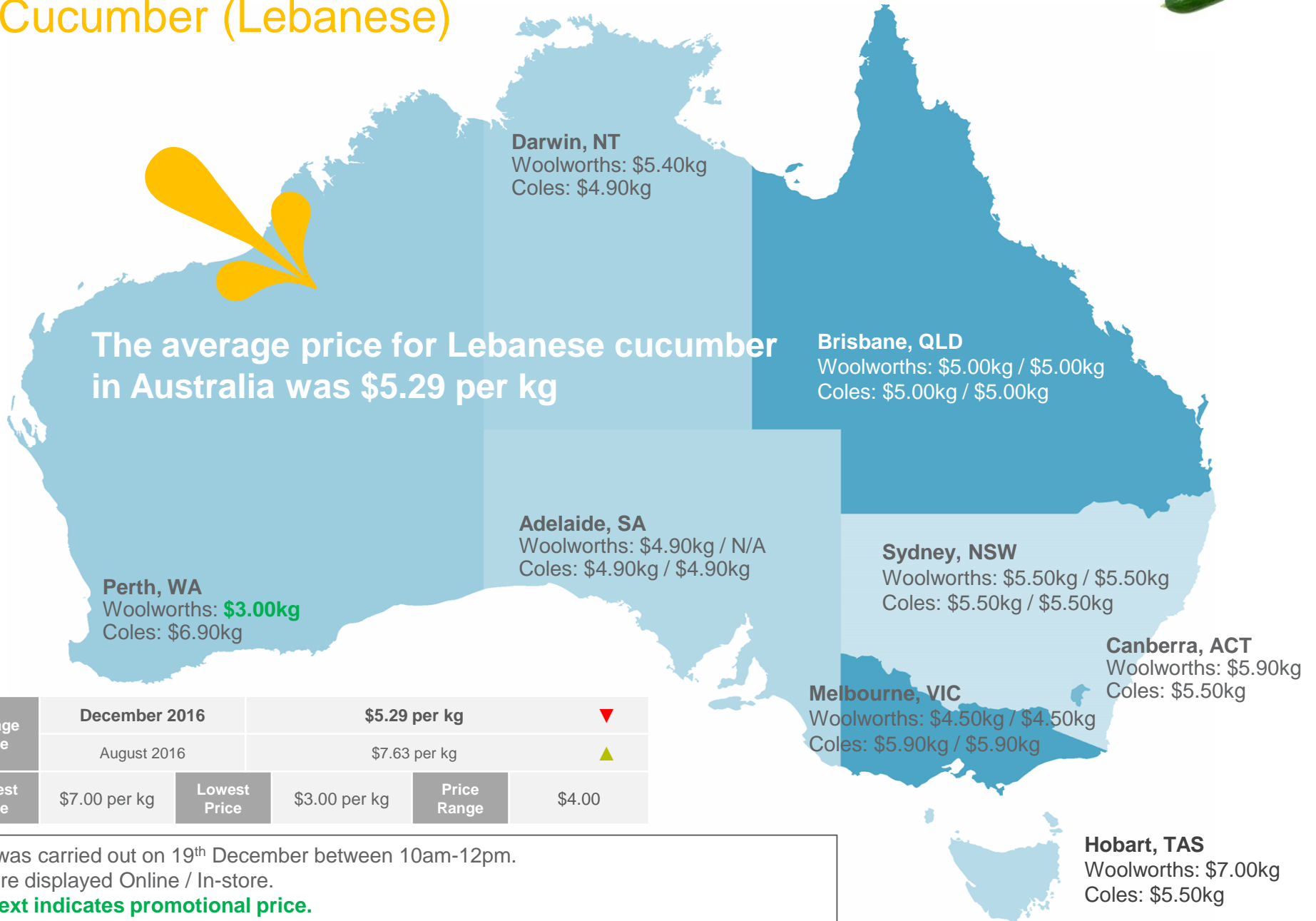
Consumers primarily purchase individual cucumbers. There is a small market for baby cucumber and pre-packaged formats.



Q4b In what fresh formats do you typically purchase Cucumber?  
Sample Wave 35 N=310, Wave 39 N=303, Wave 43 N=310

# Online and In-store Commodity Prices

## Cucumber (Lebanese)



Average Price	December 2016	\$5.29 per kg ▼			
	August 2016	\$7.63 per kg ▲			
Highest Price	\$7.00 per kg	Lowest Price	\$3.00 per kg	Price Range	\$4.00

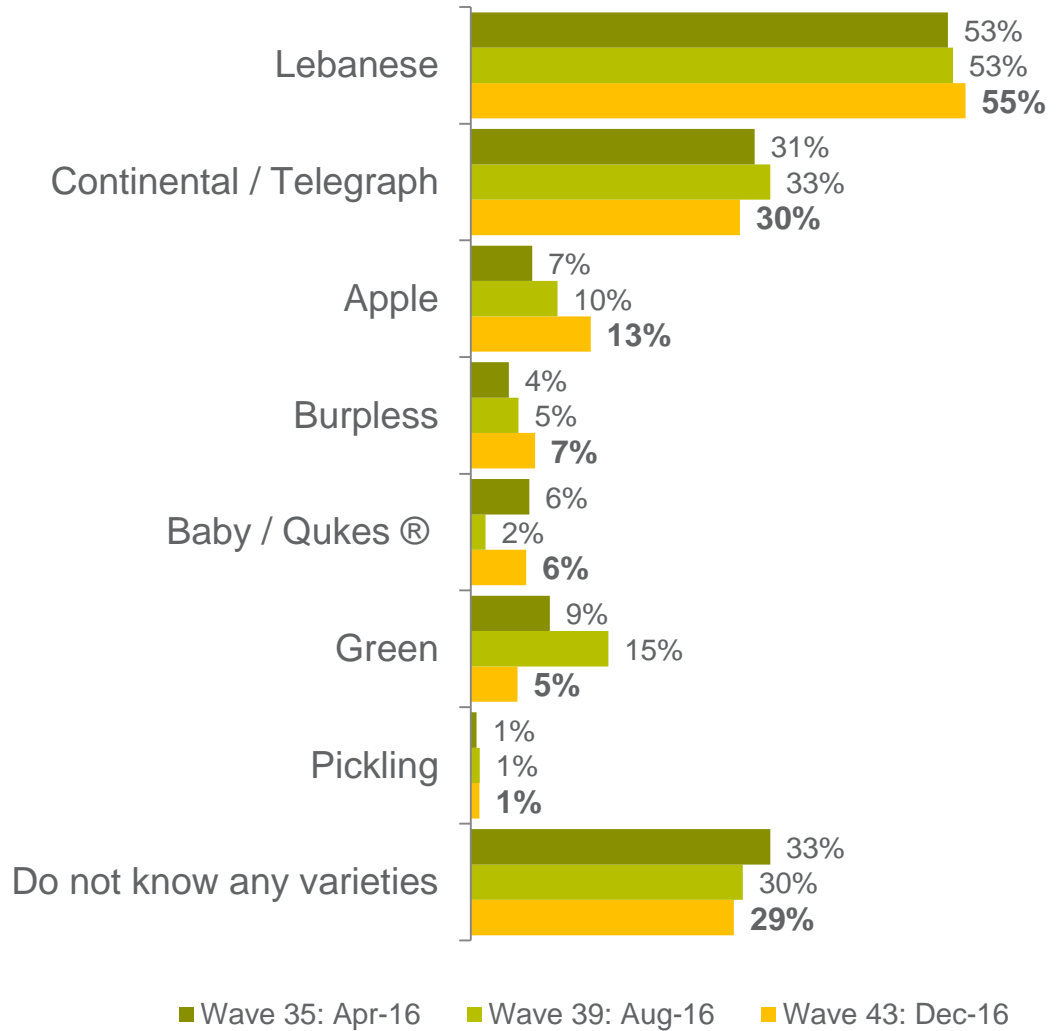
Pricing was carried out on 19<sup>th</sup> December between 10am-12pm.  
Prices are displayed Online / In-store.

**Green text indicates promotional price.**





Spontaneous awareness of cucumbers is relatively consistent with the previous wave. Lebanese and Continental/Telegraph remain the most recalled types. There has been greater recall of Apple over the last three waves.



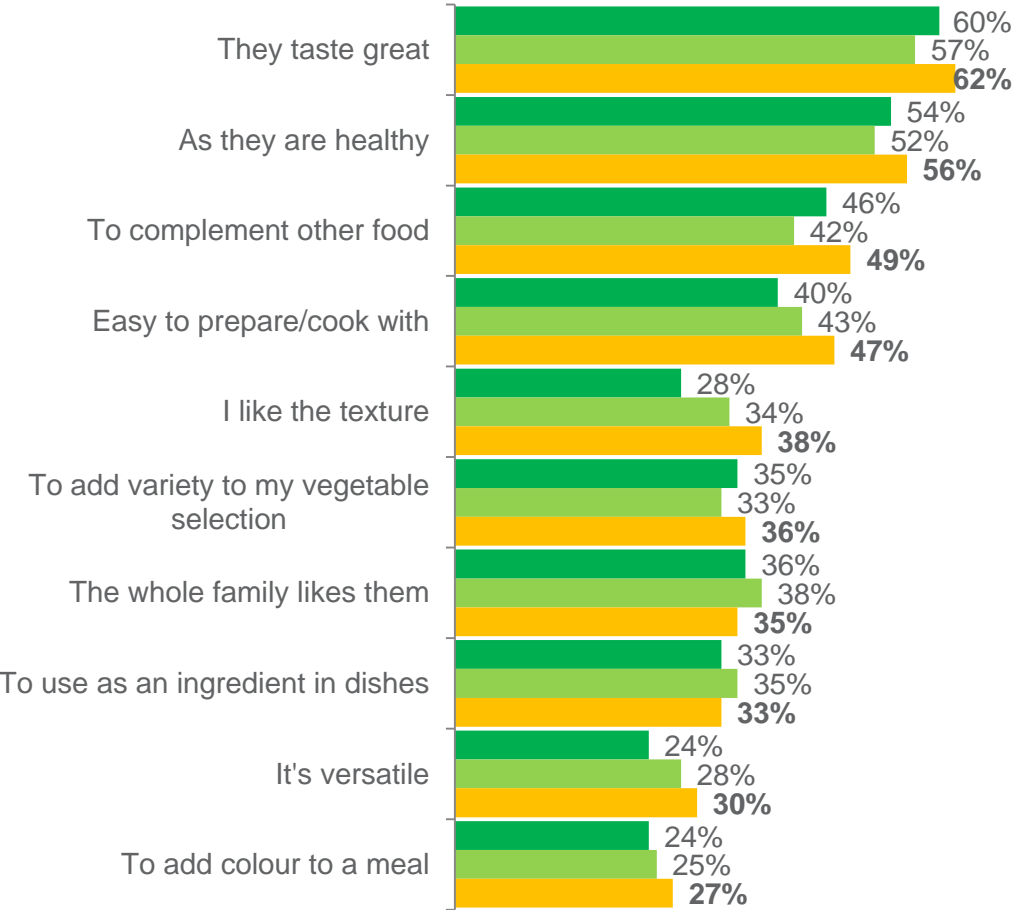
Q6a. What types/varieties of <commodity> are you aware of? (unprompted)  
 Sample Wave 35 N=310, Wave 39 N=303, Wave 43 N=310



Taste and health remain the key triggers to cucumber purchase. Not wanting to waste any and already consuming enough are the main barriers to purchase. There has been an increasing trend in ease of preparation, texture and versatility as triggers to purchase.

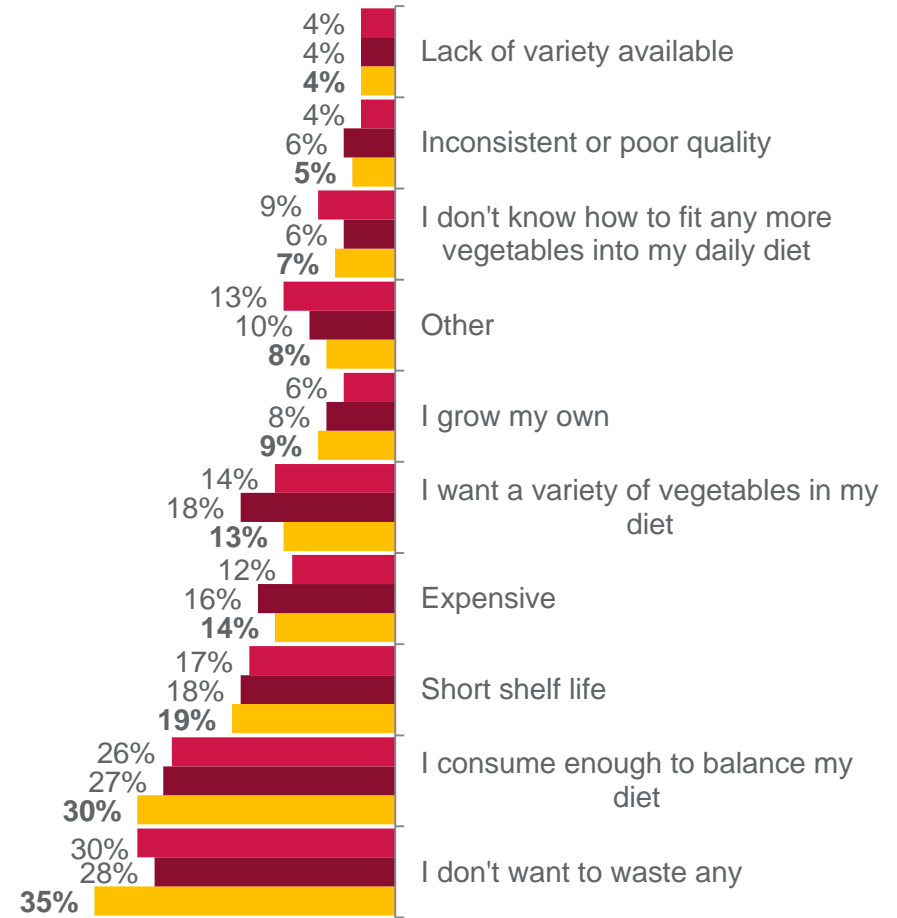


### Triggers



■ Wave 35: Apr-16    ■ Wave 39: Aug-16    ■ Wave 43: Dec-16

### Barriers



■ Wave 35: Apr-16    ■ Wave 39: Aug-16    ■ Wave 43: Dec-16

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

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

Sample Wave 35 N=310, Wave 39 N=303, Wave 43 N=310



Dinner and lunch are the main meal occasions for cucumber consumption.

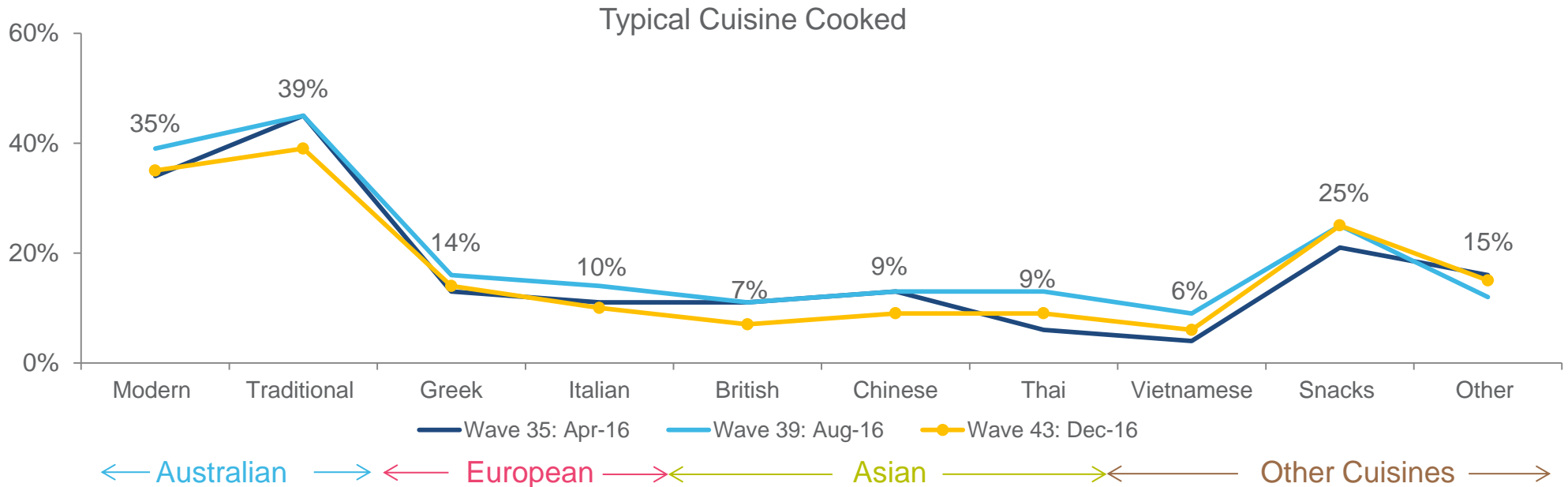
There are limited cuisine styles currently being cooked using cucumber. Australian and snacks are most popular with consumers.

### Top 5 Consumption Occasions

	Wave 39	Wave 43
Dinner	58%	62%
Lunch	61%	59%
Quick Meals	46%	48%
Family meals	48%	45%
Weekday meals	44%	44%

**6%**  
used cucumber when cooking a new recipe

▲ 9%, Wave 39



Q10. What cuisines do you cook/consume that use <commodity> ?  
 Q11. Which of the following occasions do you typically consume/use <commodity> ?  
 Sample Wave 35 N=310, Wave 39 N=303, Wave 43 N=310



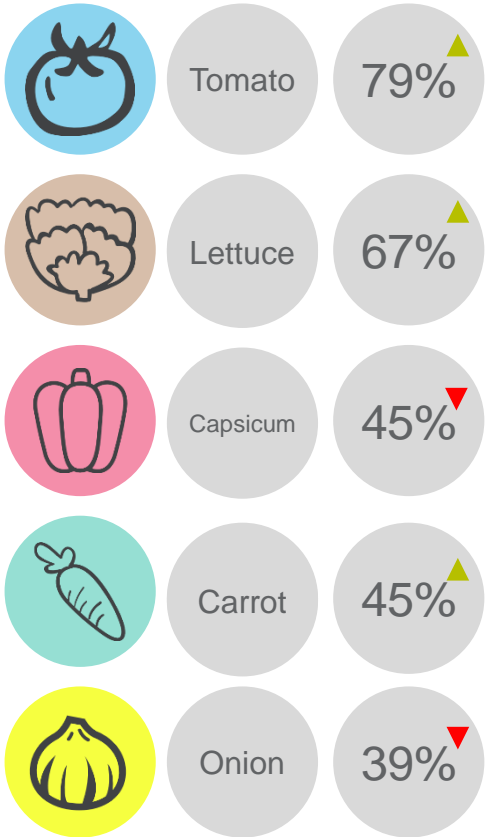
▼ : Indicates LOWER score than current wave.  
 ▲ : Indicates HIGHER score than current wave.



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



Accompanying Vegetables



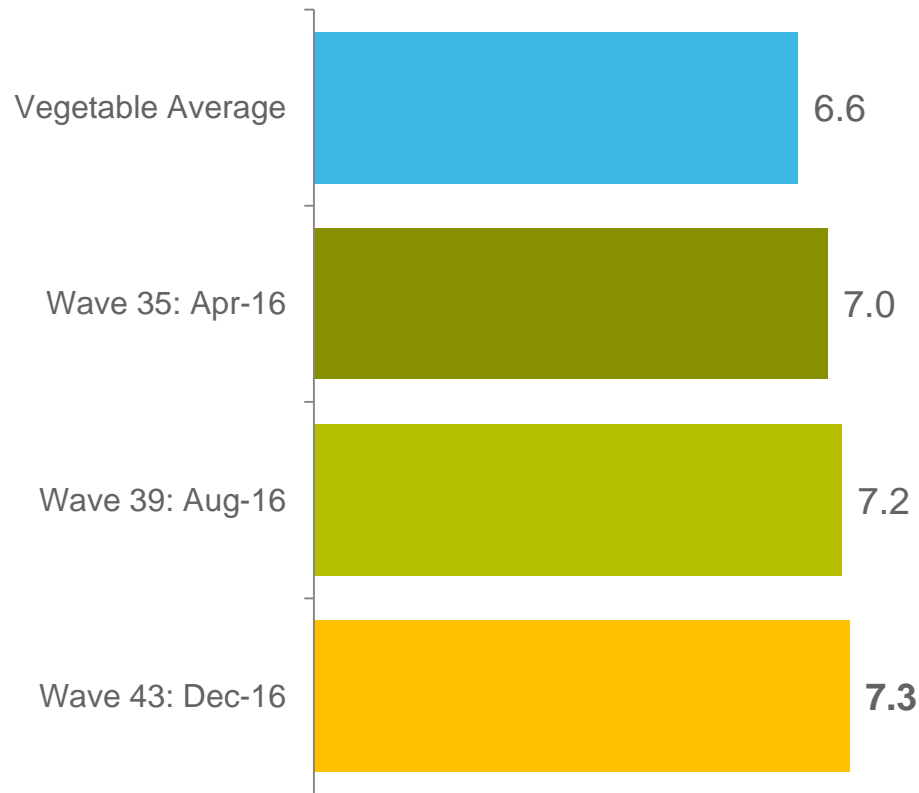
Top Cooking Styles

	Wave 35	Wave 39	Wave 43
Raw	79%	79%	82%
Other	15%	12%	13%
Stir frying	12%	15%	12%
Steaming	3%	6%	5%
Roasting	4%	3%	3%
Frying	4%	4%	3%
Grilling	3%	6%	3%
Soup	5%	9%	3%
Sautéing	3%	5%	3%
Boiling	2%	6%	2%

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 35 N=310, Wave 39 N=303, Wave 43 N=310



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



Q14. When purchasing <commodity>, how important is Provenance to you?  
 Q15. And when purchasing Cucumber, how important is that it is grown in Australia?  
 Sample Wave 35 N=310, Wave 39 N=303, Wave 43 N=310

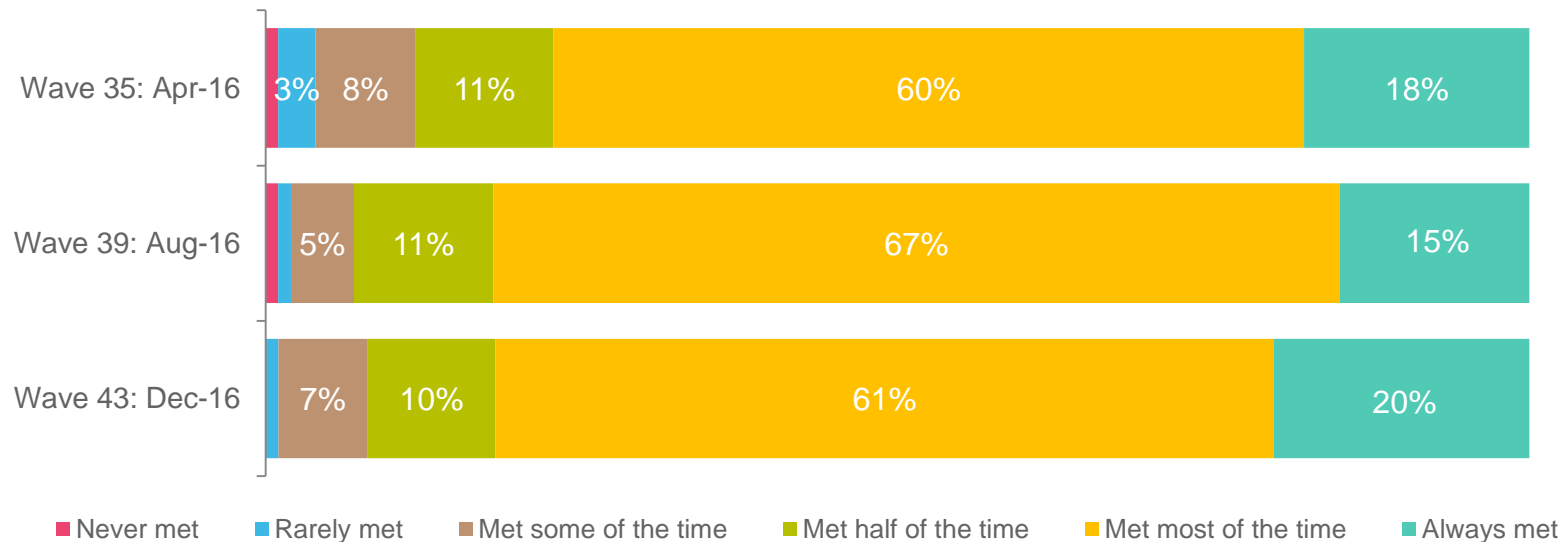


Cucumbers are expected to remain fresh for just over a week, which remains relatively consistent with the previous wave. The proportion of consumers who report their freshness expectations are always being met has increased this wave.

Expected to stay fresh for **7.9 days**

- ▲ 8.4 days, Wave 35
- ▲ 8.0 days, Wave 39

### 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 35 N=310, Wave 39 N=303, Wave 43 N=310



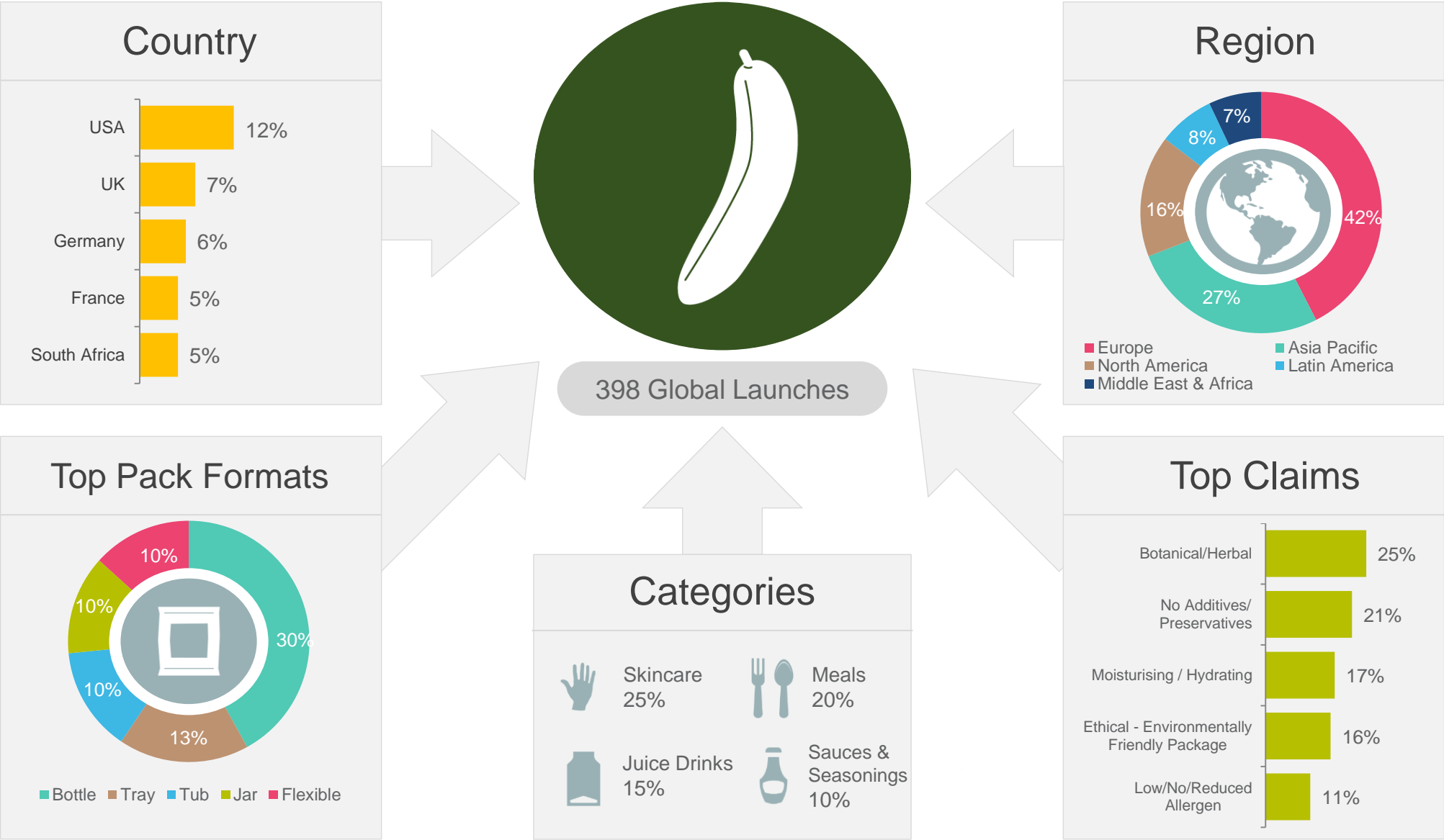


# Trends: Cucumber

# Cucumber Launches

## September – December 2016

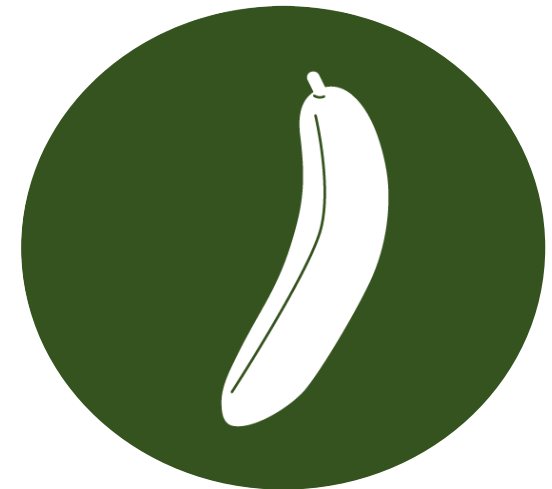
There were 398 products launched globally in the last three months that contained cucumber as an ingredient. The majority of launches occurred in Europe and Asia Pacific regions. The key categories for launches were skincare, meals, juice drinks and sauces.





# Cucumber Product Launches: Last 3 Months (September – December 2016) Summary

- There were 398 cucumber products launched globally, relatively consistent with the previous wave.
- There were 8 products containing cucumber launched in Australia over the last three months.
- Key regions for launch were Europe (42%) and Asia Pacific (27%).
- Bottles (30%), trays (13%) and tubs (10%) were the most common formats used.
- Top category launches were primarily skincare (25%), meals (20%), juice drinks (15%) and sauces & seasonings (10%).
- The top claims used for products were botanical/herbal (25%), no additives/preservatives (21%), and moisturising/hydrating (17%).
- The most innovative launch was a Cucumber & Mint Soft Drink from Canada (examples can be found in the following pages).



Source: Mintel (2016)

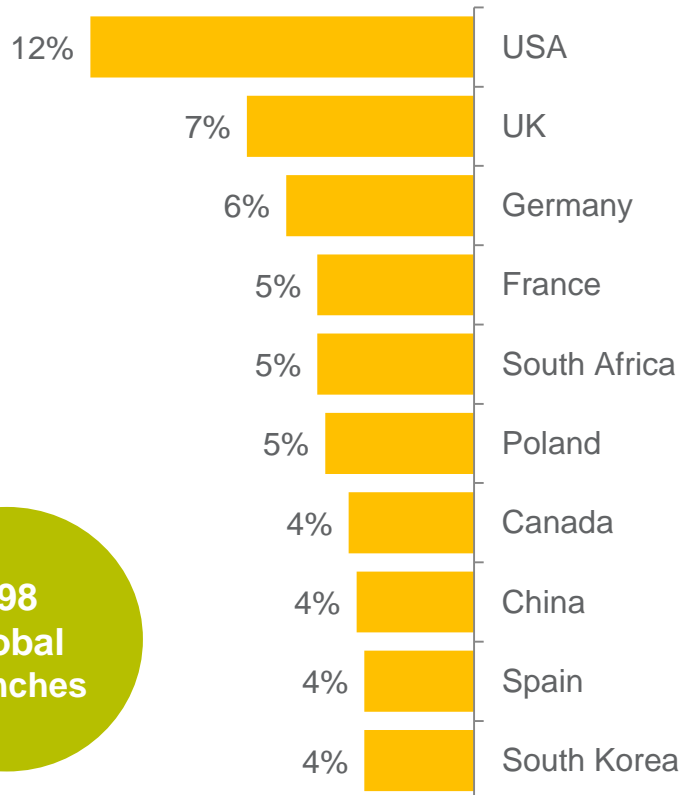




# Cucumber Launches

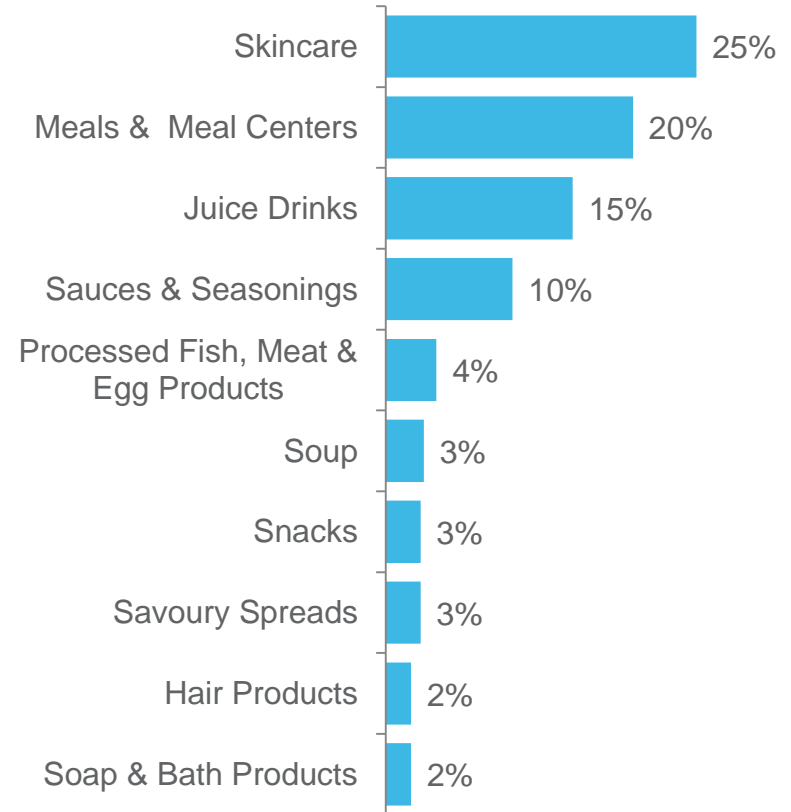
- ➔ USA and UK were the main countries of launch for cucumber products.
- ➔ Products were primarily skincare, meals, juice drinks and sauces.

### Top Launch Countries



398  
Global  
Launches










### Top Launch Categories














The main claims used on products were botanical/herbal and no additives/preservatives. Bottles and trays were typical packaging formats used.

### Pack Formats Used

Global		Bottle	30%
		Tray	13%
		Tub	10%
Europe		Bottle	30%
		Tray	19%
		Tub	12%
Asia Pacific		Bottle	29%
		Flexible	19%
		Flexible sachet	14%

### Top Claims Used

Global		Botanical/Herbal	25%
		No Additives/Preservatives	21%
		Moisturising / Hydrating	17%
Europe		No Additives/Preservatives	22%
		Ethical - Environmentally Friendly Package	16%
		Low/No/Reduced Allergen	12%
Asia Pacific		Botanical/Herbal	49%
		Moisturising / Hydrating	32%
		Cleansing	19%

# ➤➤➤ Innovative Cucumber Launches: L3M (September – December 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

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

Mini Drink6 Nutrimebic 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

## Cawston Press Cucumber & Mint Soft Drink (Canada)

Cawston Press Cucumber & Mint Soft Drink is blended with crisp apples and sparkling water, and contains 99 calories and nothing artificial. It is free from sugar, dyes, preservatives, and retails in a 330ml recyclable pack featuring the Twitter, Facebook and Instagram logos.



**Claims:**  
No Additives/Preservatives, All Natural Product, Low/No/Reduced Sugar, Ethical - Environmentally Friendly Package, Social Media

## Neo Cheddar Cheese Flavour Crispy Roll (Indonesia)

Neo Wafer Roll dengan Rasa Keju (Cheddar Cheese Flavour Crispy Roll) is baked with 21 wholegrains and eight vegetables. It retails in a 40g pack.



**Claims:**  
Wholegrain



# ➤➤➤ Innovative Cucumber Launches: L3M (September – December 2016)

## Boots Delicious Duck & Hoisin Sauce Wrap (UK)

Boots Delicious Duck & Hoisin Sauce Wrap has been repackaged. The product comprises shredded cooked duck in a hoisin plum sauce with mixed leaves, Chinese leaf, cucumber and spring onion in a wheat tortilla wrap. It has 395 calories, contains no mayonnaise, and retails in a recyclable single-unit pack.



**Claims:**  
Ethical - Environmentally Friendly Package

## Coop Klar Til At Spise Pasta Salad with Sweet Chili and Prawns (Denmark)

Coop Klar Til At Spise Måltidssalat med Kæmpe Rejer med Pasta og Sød Chili (Pasta Salad with Sweet Chili and Prawns) is described as satiated, easy and delicious. It comprises 385g of mixed salad with prawns, 60g of dressing, and 5g of sesame seeds. The product is ready-to-eat, is recommended for on-the-go, and it retails in a 450g pack bearing a Farmed Responsibly ASC Certified logo.



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

## Qcumber Natural Cucumber Sparkling Mixer (UK)

Qcumber Natural Cucumber Sparkling Mixer has been repackaged. This refreshing product comprises a delicious blend of natural cucumber and sparkling spring water. It is said to be a perfect mixer for gin, vodka and cocktails, and is free from preservatives, artificial sweeteners and flavouring. This water provides only 52 calories per bottle and retails in a pack containing four 200ml bottles.



**Claims:**  
No Additives/Preservatives, Low/No/Reduced Calorie

## Saffron Road Cucumber Dill Baked Lentil Chips (Singapore)

Saffron Road Cucumber Dill Baked Lentil Chips are described as irresistible crunchy chips featuring exotic flavours and containing four grams of plant based protein per serving. These high protein, halal and kosher certified chips is also high in fiber, low in fat and gluten-free. The product retails in a 113g pack, featuring the Facebook, Twitter, Instagram and Pinterest logos.



**Claims:**  
High/Added Fiber, Kosher, Low/No/Reduced Fat, Halal, Gluten-Free, Low/No/Reduced Allergen, High Protein, Social Media

# ➤➤➤ Innovative Cucumber Launches: L3M (September – December 2016)

## Lay's Wavy Greek Tzatziki Flavored Potato Chips (USA)

Lay's Wavy Greek Tzatziki Flavored Potato Chips have been repackaged in a new design. It is seasoned with dill, garlic, unique spices and yogurt, and features a creamy flavour. The product is partially produced with genetic engineering, and it retails in a 7.75-oz. pack featuring a consumer competition to win trips, travel gear and more.



**Claims:**  
N/A

## Tetley Signature Twisty Mint and Cucumber Flavoured Sencha Green Tea (France)

Tetley Signature Twisty Mint Thé Vert Sencha Aromatisé Menthe & Concombre (Twisty Mint and Cucumber Flavoured Sencha Green Tea) is now available. This product is said to be part of a stylish collection of premium sourced long leaf teas and comes in a clear square-shaped bag that unlocks the best flair and flavour at each brew.



**Claims:**  
Premium, Ethical - Environmentally Friendly Package

## Belberry Royal Selection Green Cucumber Vinegar (Norway)

Belberry Royal Selection Agurkeddik (Green Cucumber Vinegar) is now available. This product retails in a 200ml pack.



**Claims:**  
N/A

## Holistik Greenfinity Mini Frozen Fruit Bars (Mexico)

Holistik Mini Paletas de Pepino, Hierbabuena, Alfalfa (Greenfinity Mini Frozen Fruit Bars) are made with organic agave syrup, cucumber, alfalfa and peppermint. This all natural product contains no added sugar, and is made with 100% real, non-GMO fruits. The balance of energies that cucumber, peppermint and alfalfa have, are said to cause a feeling of lightness and contentment.



**Claims:**  
All Natural Product, Kosher, Low/No/Reduced Sugar, Organic, GMO-Free, Social Media



# Australian Cucumber Launches: L3M (September – December 2016)

## KoCostar Cucumber Slice Mask Sheet

KoCostar Cucumber Slice Mask Sheet is designed to provide moisture and nourishment whilst giving skin a cooling effect for better relaxation. The "unique" mask sheet is said to allow placement of patches on areas that need more help. The product retails in a 2-ct. pack.



**Claims:**  
Moisturising / Hydrating

## Avon Naturals Body Care Fresh Cucumber & Melon Shower Gel

Avon Naturals Body Care Fresh Cucumber & Melon Shower Gel is designed with a fresh fragrance of crisp cucumber and juice melon accented by a note of lush violet leaf. The moisturising shower gel is said to leave skin cleansed and conditioned. The product retails in a 750ml pack.



**Claims:**  
Moisturising / Hydrating



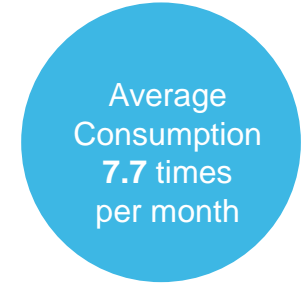
A close-up photograph of several green zucchinis with characteristic light-colored speckles. A large, dark grey circle is superimposed over the center of the image, containing the text 'Zucchini.' in white.

Zucchini.



Both purchase and consumption frequency of zucchini slightly declined this wave.

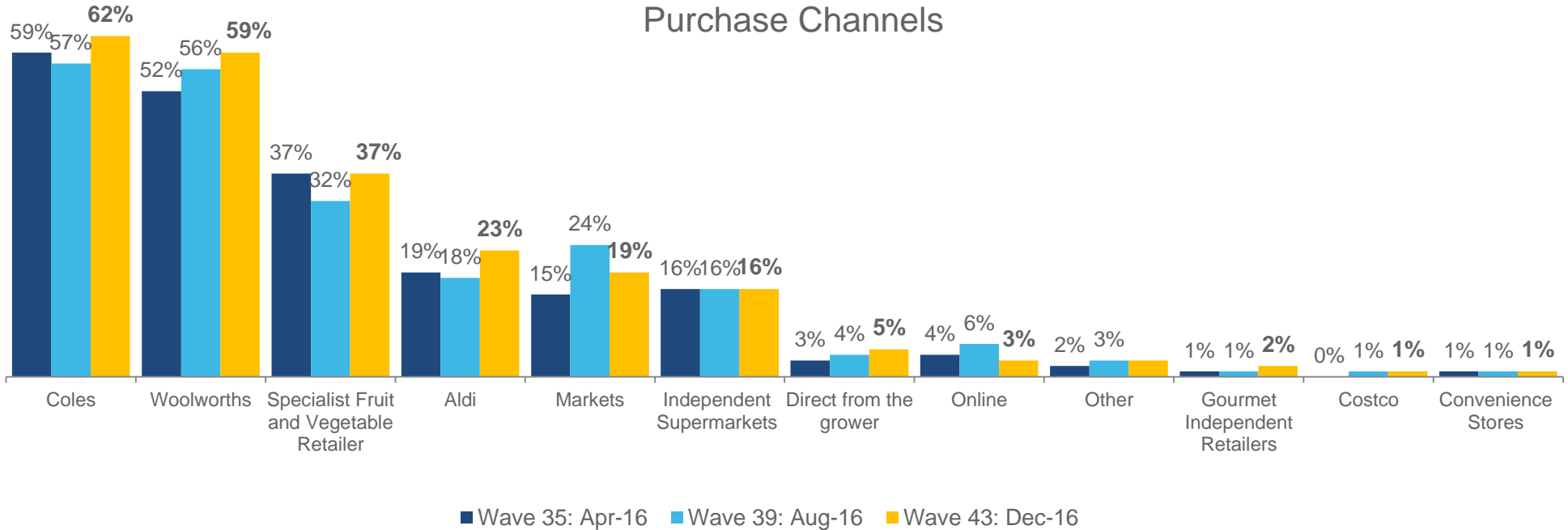
Purchase of zucchini is predominantly through mainstream retail channels. There has been an increase in purchase from Aldi this wave.



▼ 3.3 times, Wave 35  
▲ 3.7 times, Wave 39

▼ 7.0 times, Wave 35  
▲ 7.9 times, Wave 39

### 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 35 N=308, Wave 39 N=309, Wave 43 N=306



# Average Spend and Price Sensitivity



Average weight of purchase

The average consumer typically purchases **700g** of zucchini per shop. Purchase weight returned to levels found in Wave 35.

- 700g, Wave 35
- ▲ 800g, Wave 39



Recalled last spend

The average recalled last spend is **\$3.30**, remaining consistent with the previous wave.

- ▼ \$2.90, Wave 35
- \$3.30, Wave 39



Value for money

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

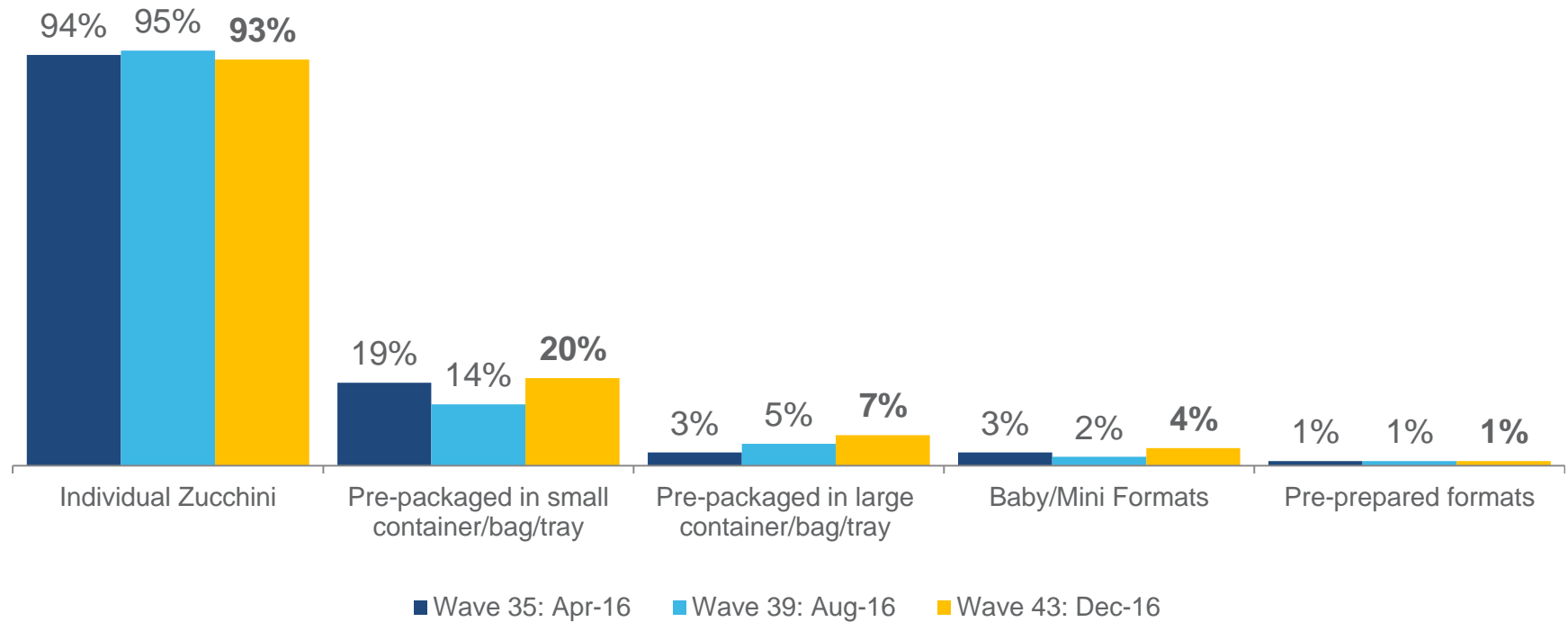
- ▲ 6.6/10, Wave 35
- ▲ 6.7/10, Wave 39

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 35 N=308, Wave 39 N=309, Wave 43 N=306





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

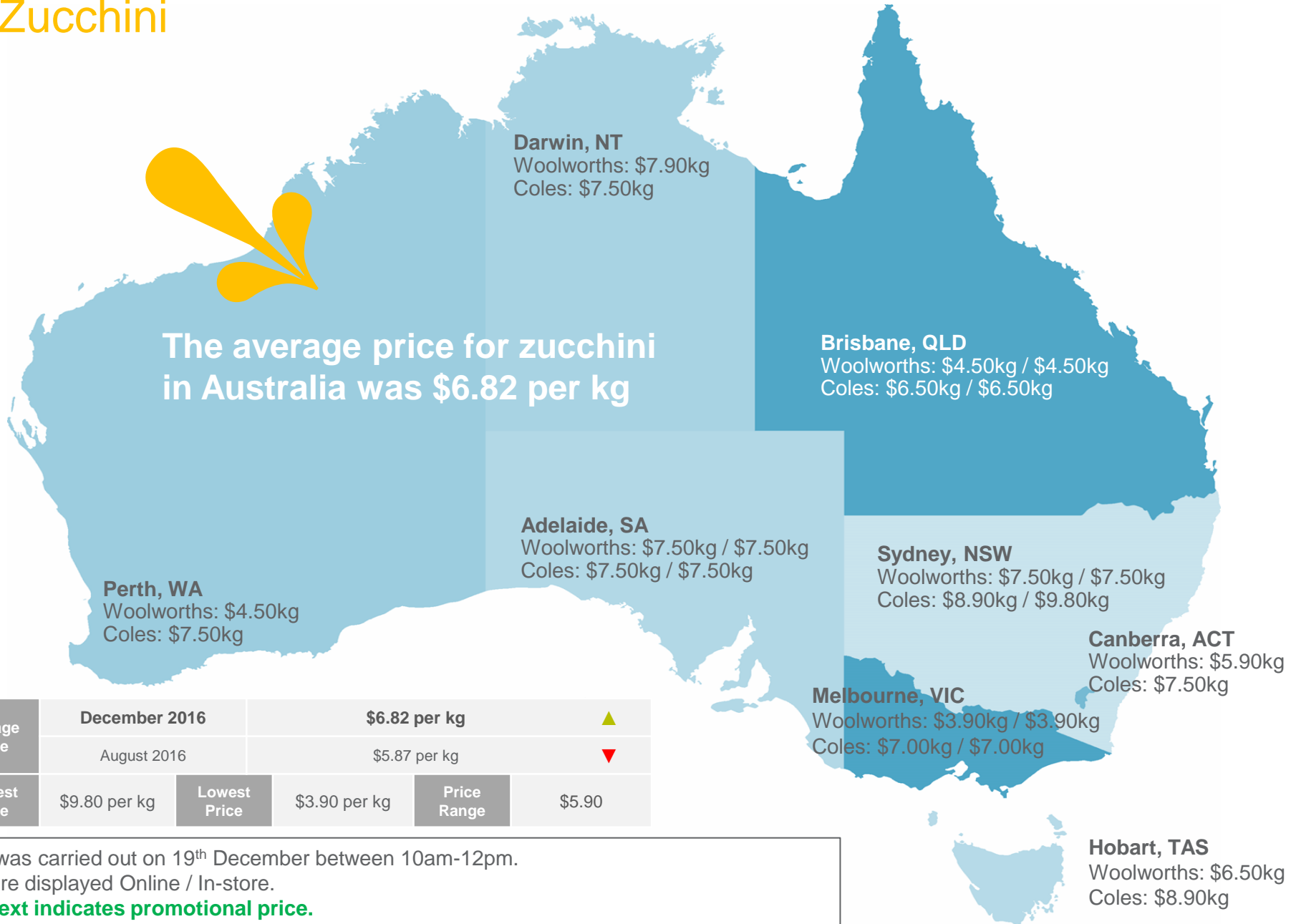


Q4b In what fresh formats do you typically purchase Zucchini?  
Sample Wave 35 N=308, Wave 39 N=309, Wave 43 N=306

# Online and In-store Commodity Prices



## Zucchini



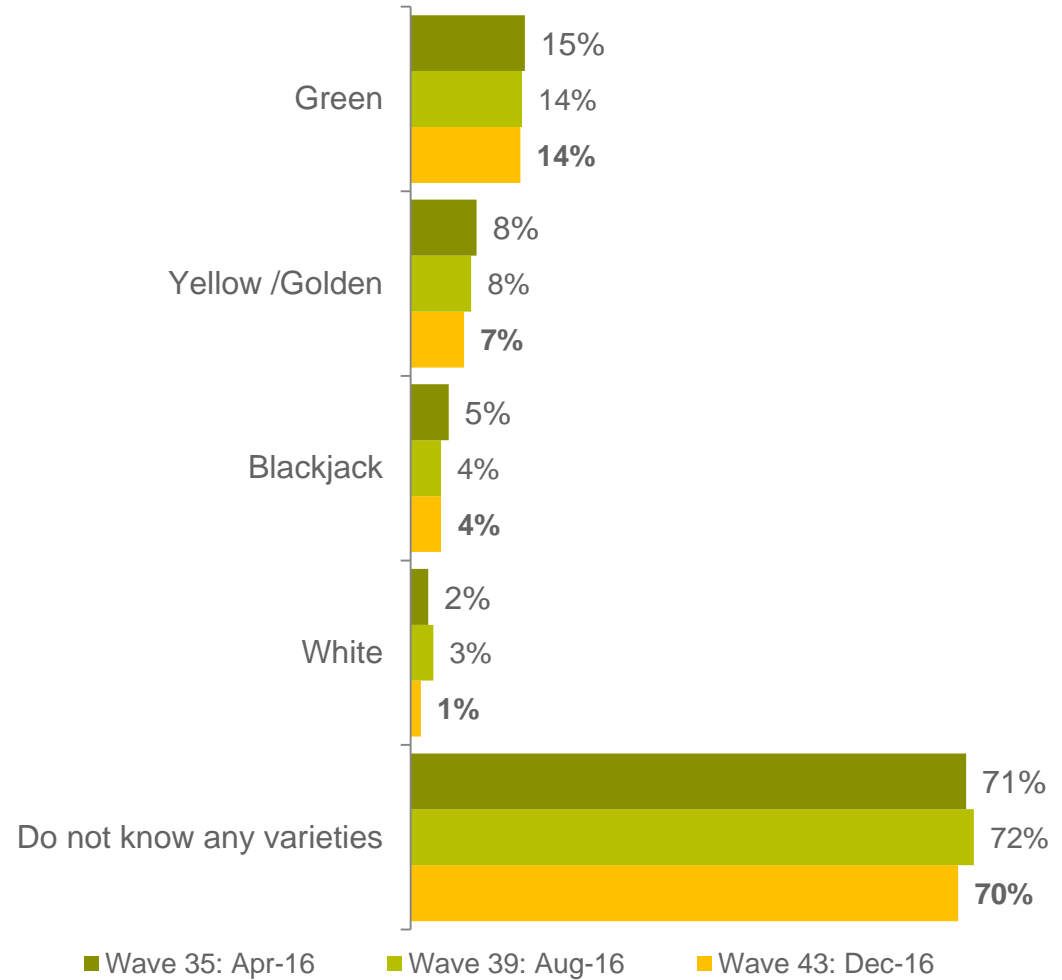
Average Price	December 2016	\$6.82 per kg		▲	
	August 2016	\$5.87 per kg		▼	
Highest Price	\$9.80 per kg	Lowest Price	\$3.90 per kg	Price Range	\$5.90

Pricing was carried out on 19<sup>th</sup> December between 10am-12pm.  
 Prices are displayed Online / In-store.  
**Green text indicates promotional price.**



Overall, awareness of zucchini varieties remains very low.

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



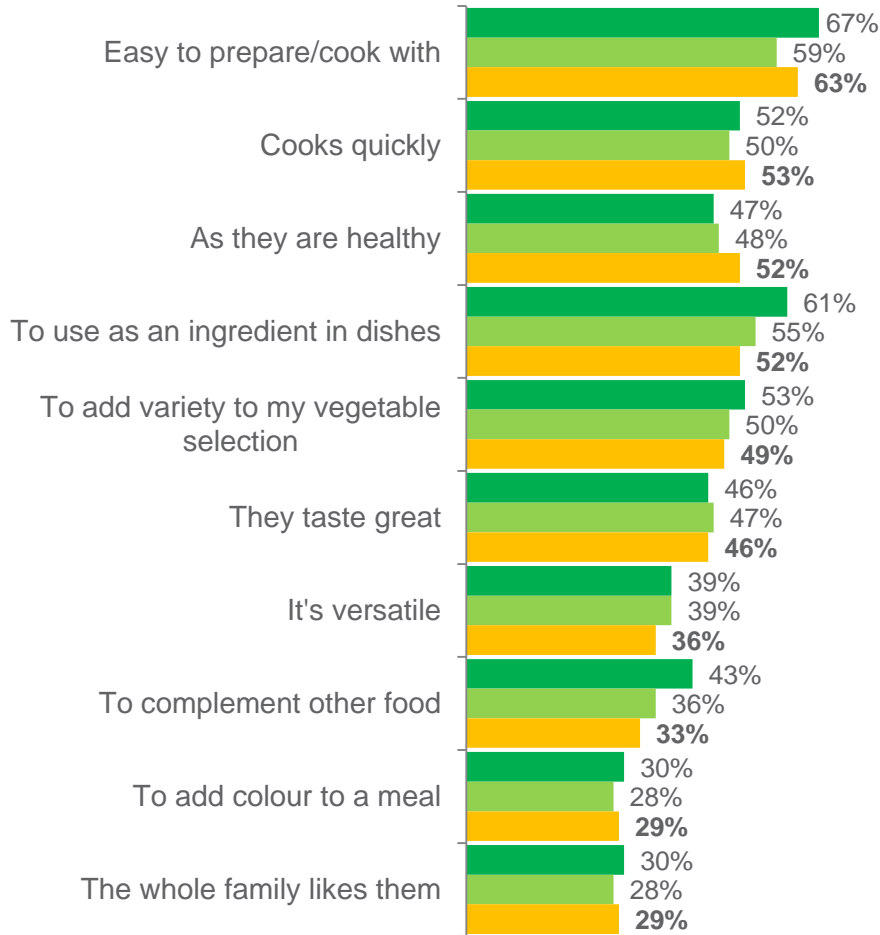
Q6a. What varieties of <commodity> are you aware of? (unprompted)  
Sample Wave 35 N=308, Wave 39 N=309, Wave 43 N=306



Ease of preparation and cooks quickly are the primary reasons for purchase. In contrast, not wanting to waste any and consuming enough for needs are the main barriers to future purchase.

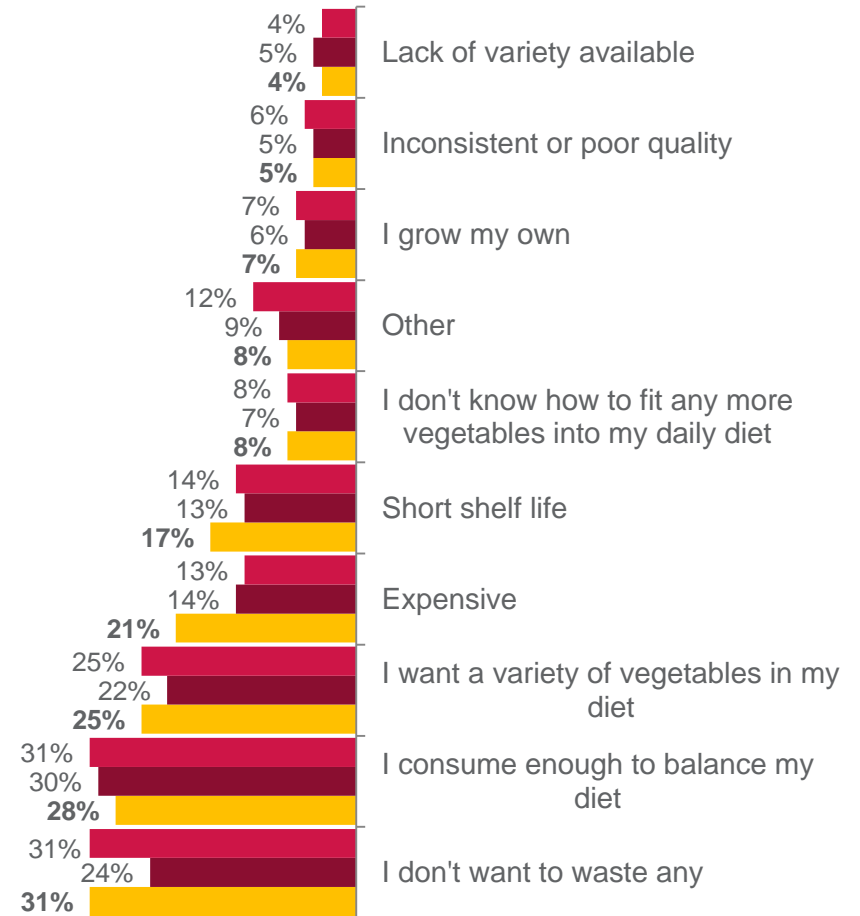


### Triggers



■ Wave 35: Apr-16   ■ Wave 39: Aug-16   ■ Wave 43: Dec-16

### Barriers



■ Wave 35: Apr-16   ■ Wave 39: Aug-16   ■ Wave 43: Dec-16

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

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

Sample Wave 35 N=308, Wave 39 N=309, Wave 43 N=306



Zucchini is generally eaten at dinner, consistent with previous waves.

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

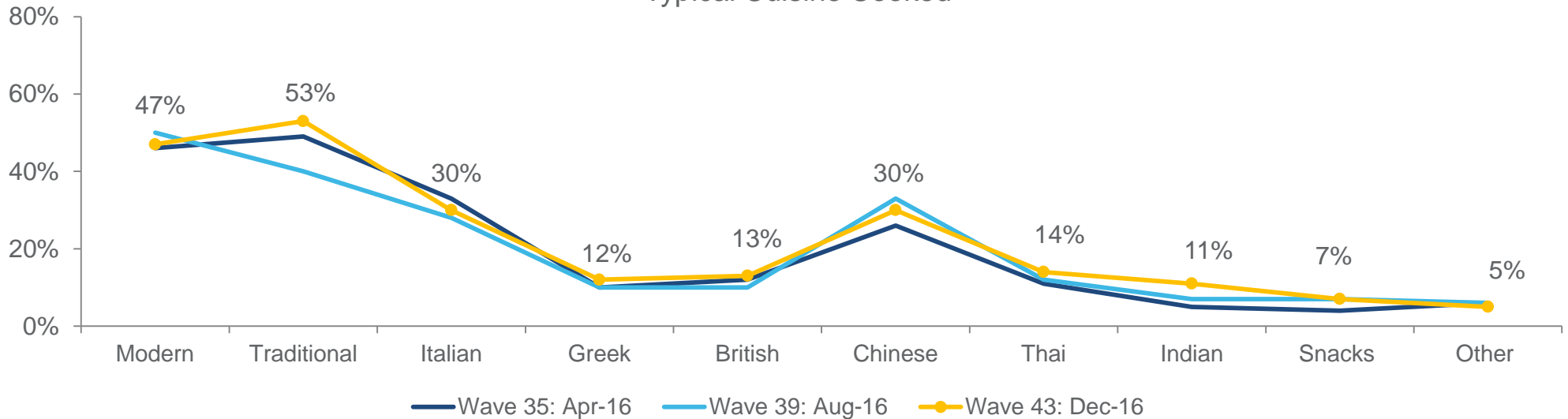
### Top 5 Consumption Occasions

	Wave 39	Wave 43
Dinner	72%	73%
Family meals	53%	59%
Quick Meals	43%	48%
Weekday meals	46%	48%
Weekend meals	39%	39%

**18%**  
used zucchini when cooking a new recipe

▼ 15%, Wave 39

### Typical Cuisine Cooked



← Australian →   ← European →   ← Asian →   Other Cuisines



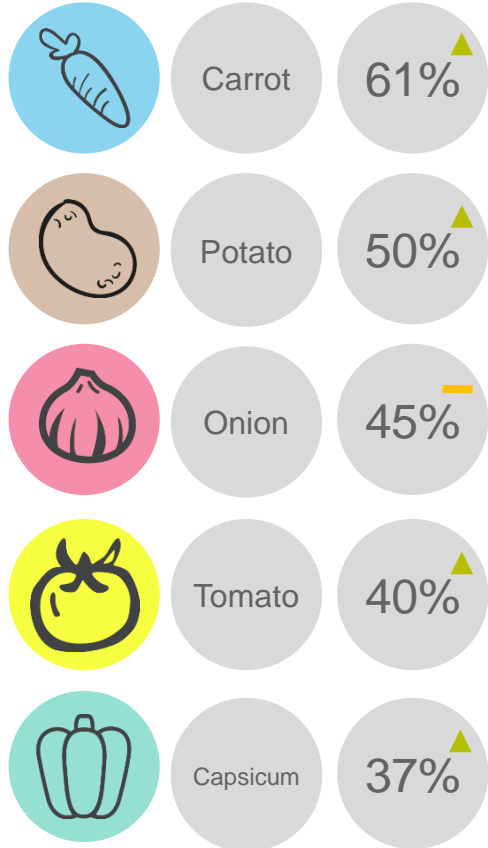
▼ : Indicates LOWER score than current wave.  
▲ : Indicates HIGHER score than current wave.

Q10. What cuisines do you cook/consume that use <commodity>?  
Q11. Which of the following occasions do you typically consume/use <commodity>?  
Sample Wave 35 N=308, Wave 39 N=309, Wave 43 N=306



Zucchini is cooked in multiple ways, including stir-frying, steaming, frying and sautéing. Carrot, potatoes and onion are typically served with zucchini.

### Accompanying Vegetables



### Top Cooking Styles

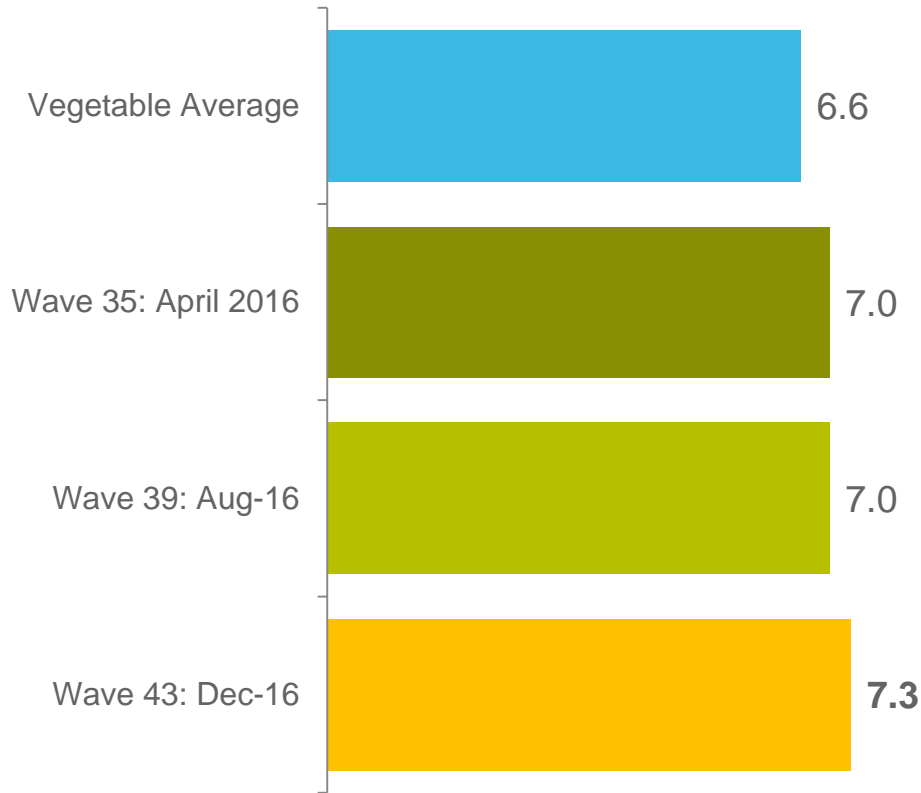
	Wave 35	Wave 39	Wave 43
Stir frying	54%	52%	56%
Steaming	39%	36%	38%
Frying	27%	22%	29%
Sautéing	27%	27%	29%
Roasting	24%	27%	26%
Soup	27%	27%	24%
Grilling	21%	17%	23%
Baking	25%	23%	23%
Boiling	20%	17%	21%
Slow Cooking	18%	15%	20%

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 35 N=308, Wave 39 N=309, Wave 43 N=306





Importance of provenance has increased this wave, sitting above the Vegetable Average. Knowing that zucchinis are grown in Australia remains important information for consumers.



Q14. When purchasing Zucchini, how important is Provenance to you?  
 Q15. And when purchasing Zucchini, how important is that it is grown in Australia?  
 Sample Wave 35 N=308, Wave 39 N=309, Wave 43 N=306

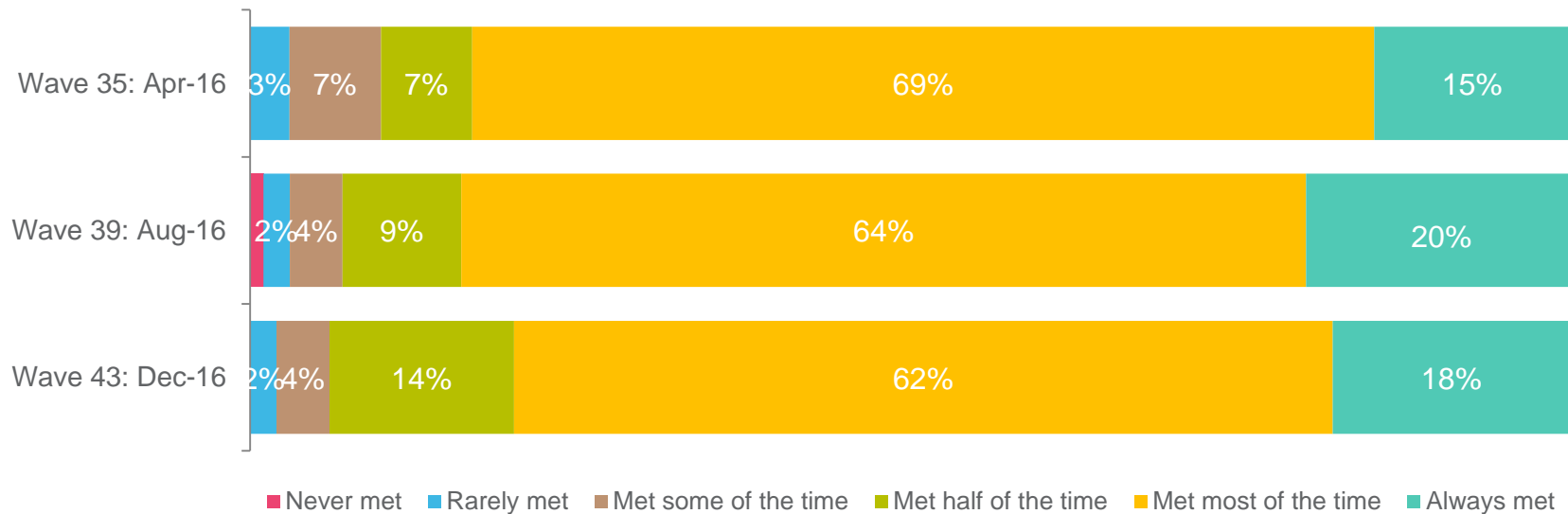


Zucchinis are expected to stay fresh for over a week once purchased, increasing over the last three waves. Freshness expectations of zucchini are relatively consistent with the previous wave.

Expected to stay fresh for 8.4 days

- ▼ 7.9 days, Wave 35
- ▼ 8.2 days, Wave 39

### 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 35 N=308, Wave 39 N=309, Wave 43 N=306



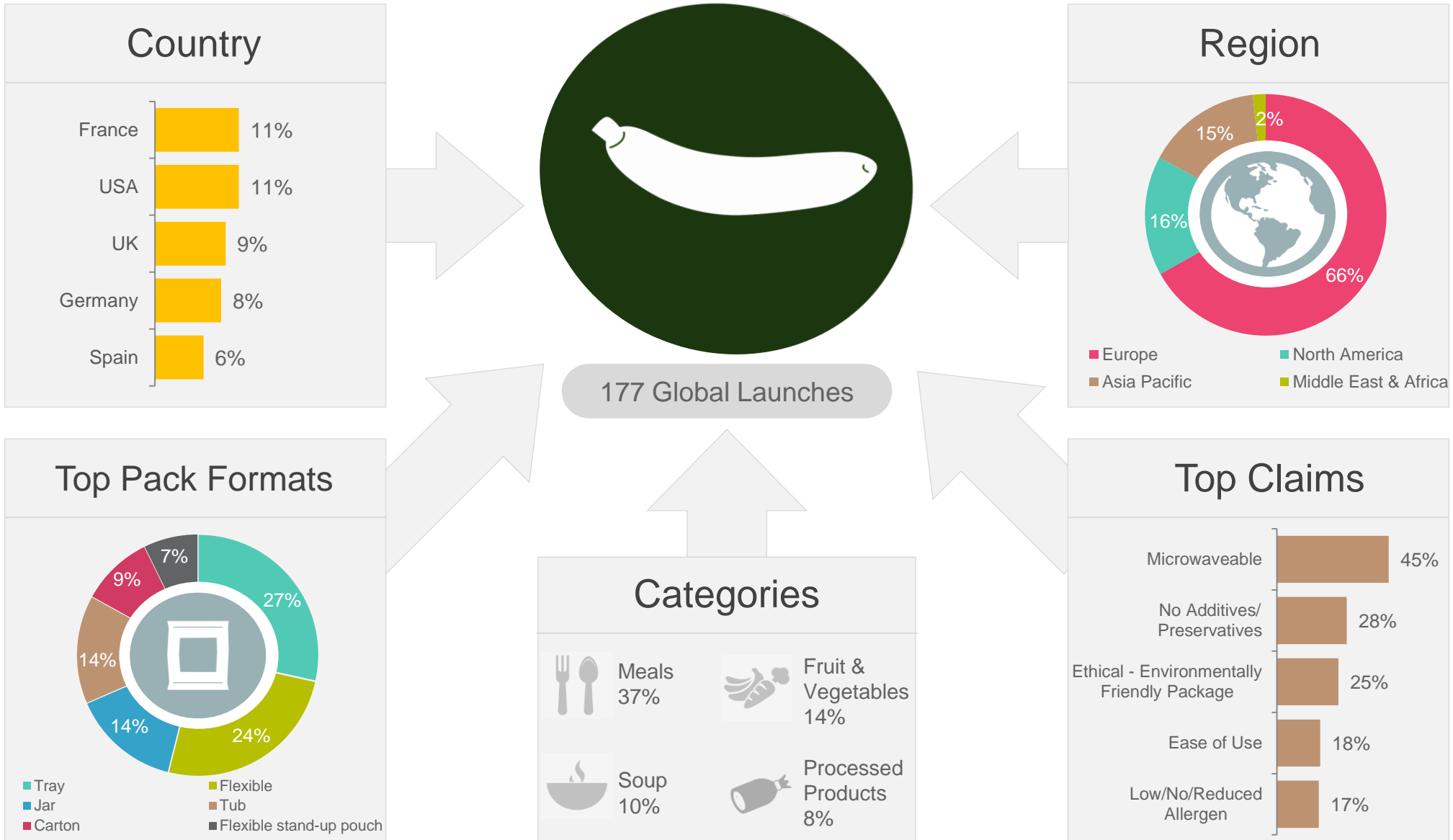
# Trends: Zucchini



# Zucchini Global Launches

## September – December 2016

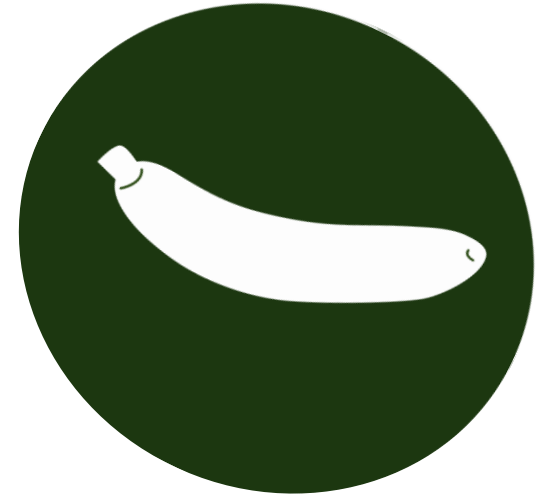
There were 177 zucchini products launched in the last three months. The majority of launches occurred in Europe. The key countries for launch included France, USA and UK. Categories for launches included meals, fruit & vegetables and soups.





# Zucchini Product Launches: Last 3 Months (September – December 2016) Summary

- There were 177 products launched globally in the last three months, which has declined this wave.
- Domestically, there were seven products launched that contained zucchini as an ingredient.
- Launches predominantly occurred in Europe (66%), followed by Asia Pacific (16%).
- The most common packaging used for launches were tray (27%) and flexible (24%) formats.
- Meals (37%), fruit & vegetables (14%) and soups (10%) were the main categories for launches.
- Microwavable (45%) remained the most common claim used for products. Ethical – Environmentally Friendly Packaging (28%) was also frequently used.
- The most innovative launch this wave was Parsnip & Zucchini Rye Bread from Finland (other examples can be found in the following pages).

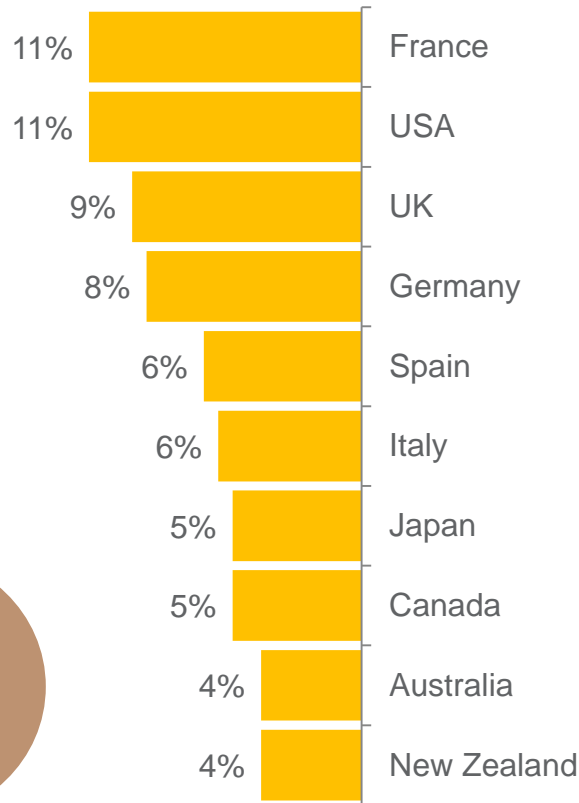




# Zucchini Launches

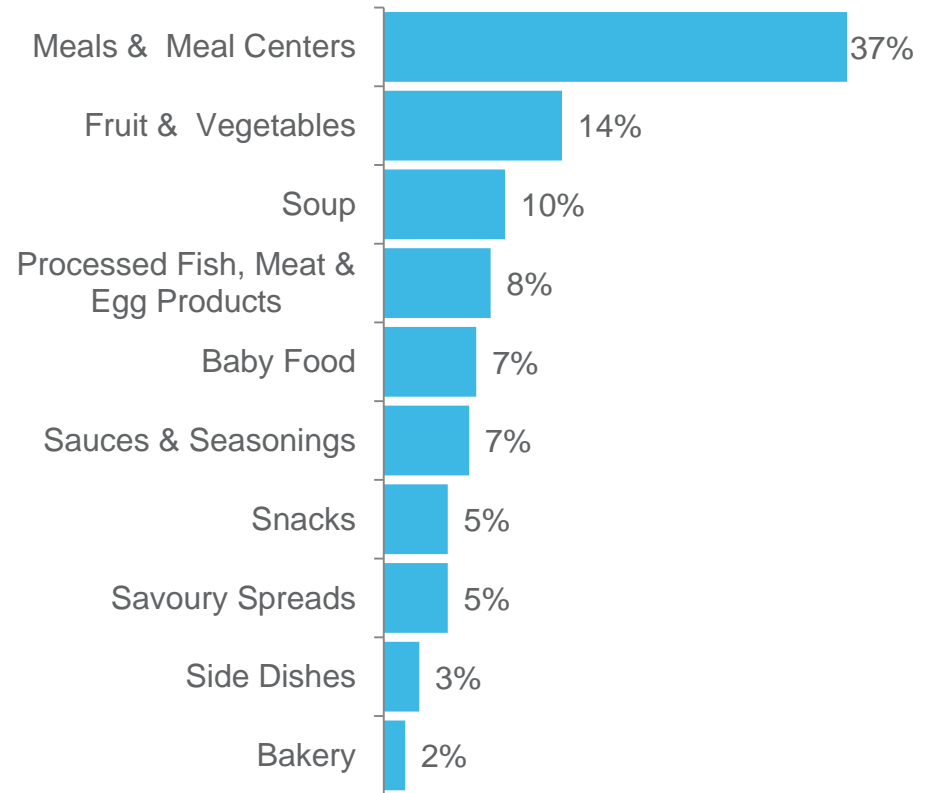
- > France was the key country for launches over the last three months, consistent with previous waves.
- > Top categories for products were meals, fruit & vegetables and soups.

### Top Launch Countries



177  
Global  
Launches

### Top Launch Categories







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

### Pack Formats Used

Global		Tray	27%
		Flexible	24%
		Jar	14%
Europe		Flexible	24%
		Tray	23%
		Jar	16%

### Top Claims Used

Global		Microwaveable	45%
		No Additives/Preservatives	28%
		Ethical - Environmentally Friendly Package	25%
Europe		Microwaveable	33%
		Ethical - Environmentally Friendly Package	25%
		No Additives/Preservatives	19%

# »»» Innovative Zucchini Launches: L3M (September – December 2016)

## Eat! 2.0 Honey Balsamic Chicken (USA)

Eat! 2.0 Honey Balsamic Chicken contains white meat chicken, roasted sweet potatoes, mushrooms, roasted zucchini and barley in honey balsamic sauce. The USDA Inspected product is minimally processed; and is free from artificial ingredients, preservatives, artificial flavors and colors.



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

## Alice & Bio Provençal Style Quiches (France)

Alice & Bio 2 Quiches Provençales aux Légumes Frais (Provençal Style Quiches) are now available. They are made with organic ingredients, fresh vegetables, fresh butter and stone-milled flour from the south west of France. They can be served with salads, as a main dish or appetizer, and can be oven baked in 12 minutes.



**Claims:**  
Organic, Ethical - Environmentally Friendly Package

## Jumbo Jamie Oliver 'Mighty' Courgette Spaghetti (Netherlands)

Jumbo Jamie Oliver 'Mighty' Courgette Spaghetti comprises courgette marrows with pesto dressing and a lemon wedge. The product retails in a 300g recyclable pack.



**Claims:**  
Ethical - Environmentally Friendly Package

## Green Giant Fresh Minestrone Soup Blend (Canada)

Green Giant Fresh Minestrone 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

# »»» Innovative Zucchini Launches: L3M (September – December 2016)

## Delhaize Lovely Meals Quinoa with Shrimps, Zucchini Tagliatelle and Soy Dressing (Belgium)

Delhaize Lovely Meals Quinoa aux Crevettes, Tagliatelles de Courgette et Dressing au Soja (Quinoa with Shrimps, Zucchini Tagliatelle and Soy Dressing) is now available. The product can be microwaved in four minutes, and retails in a 400g pack, featuring cooking instructions.



**Claims:**  
Microwaveable

## Fazer Parsnip & Zucchini Rye Bread (Finland)

Fazer Kesäkurpitsa & Palsternakka Ruis Juuresleipä (Parsnip & Zucchini Rye Bread) is made with 34% vegetables, and is free from milk, lactose, added sugar and additives. The product is rich in fibre and retails in a 280g recyclable pack containing four pieces, bearing the Finnish Swan logo.



**Claims:**  
No Additives/Preservatives, High/Added Fiber, Low/No/Reduced Sugar, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Package, Low/No/Reduced Lactose

## Comfort Finger Food Zucchini Balls (Greece)

Comfort Finger Food Kolokythokeftedes (Zucchini Balls) are said to be tastier when cooked straight from the freezer. The product can be ready in three and a half minutes retails in a 300g pack.



**Claims:**  
N/A

## Ohh Pizza 4 Reasons Pizza (Spain)

Ohh Pizza 4 Motivos Pizza (4 Reasons Pizza) is a stone baked pizza made with olive oil and slow leavened. The product comprises four different flavours on the same base, cooks in 8-10 minutes in the oven and retails in a 690g pack featuring the Facebook, Twitter and Instagram logos.



**Claims:**  
Social Media

# »»» Innovative Zucchini Launches: L3M (September – December 2016)

## Tesco Vegetable Spaghetti Salad with Spiced Coconut Dressing (UK)

Tesco Vegetable Spaghetti Salad with Spiced Coconut Dressing contains spiralled courgettes and carrots, vegetables and pumpkin seeds with a spiced coconut dressing. This vegetarian product retails in a recyclable 185g pack.



**Claims:**  
Vegetarian, Ethical - Environmentally Friendly Package

## CedarLane Natural Foods Eggplant Parmesan with Roasted Vegetables and Sundried Tomato Sauce (USA)

CedarLane Natural Foods Eggplant Parmesan with Roasted Vegetables and Sundried Tomato Sauce has been relaunched with a new brand, previously known as CedarLane. The meal is formulated with an all natural and gluten-free formula and retails in a newly designed 10-oz. pack. The microwavable product contains 13g protein, 5g fiber and 280 calories per serving.



**Claims:**  
All Natural Product, Microwaveable, Gluten-Free, Low/No/Reduced Allergen

## Wegmans Food You Feel Good About Cleaned and Cut Baby Zucchini Squash (USA)

Wegmans Food You Feel Good About Cleaned and Cut Baby Zucchini Squash is now available. The hearth-healthy and time-saving product can be simply microwaved in the bag, and contains no trans fat, artificial colors, flavors or preservatives. It is triple-washed and cut by hand, and retails in an 8-oz. pack featuring cooking instructions.



**Claims:**  
No Additives/Preservatives, Microwaveable, Low/No/Reduced Transfat, Cardiovascular (Functional), Time/Speed, Ease of Use

## VitaSnack Zucchini Crunch (UK)

VitaSnack Zucchini Crunch Snack is described as a raw food that contains no additives, added salt, sugar or gluten, and has not been fried or freeze-dried. These snacks can be eaten at any time in any place, are high in fibre, and low in sodium and saturated fats.



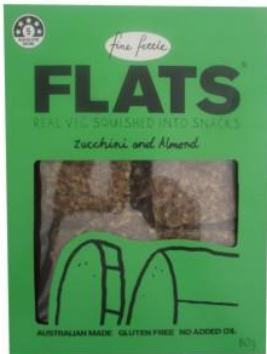
**Claims:**  
No Additives/Preservatives, High/Added Fiber, Low/No/Reduced Sugar, Organic, Low/No/Reduced Sodium, Seasonal, Gluten-Free, Low/No/Reduced Allergen, Vegan, On-the-Go, No Animal Ingredients, Low/No/Reduced Saturated Fat



# Australian Zucchini Launches: L3M (September – December 2016)

## Fine Fettle Flats Zucchini and Almond Snacks

Fine Fettle Flats Zucchini and Almond Snacks have been repackaged. This Australian product is described as real vegetables squished into snacks, and has been dried but not fried. It is free from preservatives, added oil, additives and gluten, and retails in a newly designed 80g pack featuring a five star health rating and Facebook information.



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

## Amy's Kitchen Vegetable Lasagne

Amy's Kitchen Vegetable Lasagne comprises tender spinach and zucchini, crisp carrots, the finest tomato sauce and cheeses, layered between all natural rice pasta. This gluten-free product is approved by the Vegetarian Society and can be microwaved. It is prepared with the highest quality ingredients, and is free from meat, fish, shellfish, poultry, eggs and peanuts.



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

## The Real Risotto Roast Vegetable Risotto with Parmesan

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



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

## Sandhurst Quinoa & Co. Mixed Quinoa with Eggplant Caponata

Sandhurst Quinoa & Co. Mixed Quinoa with Eggplant Caponata is ready to eat. This gluten-free product can be microwaved, and retails in a 210g pack.



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



A close-up photograph of several purple eggplants with green stems, filling the background. A large, dark grey circle is centered over the image, containing the text 'Eggplant.' in white.

Eggplant.





Both purchase and consumption frequency increased this wave.

Eggplant is primarily purchased through mainstream retailers and specialist vegetable retailers.

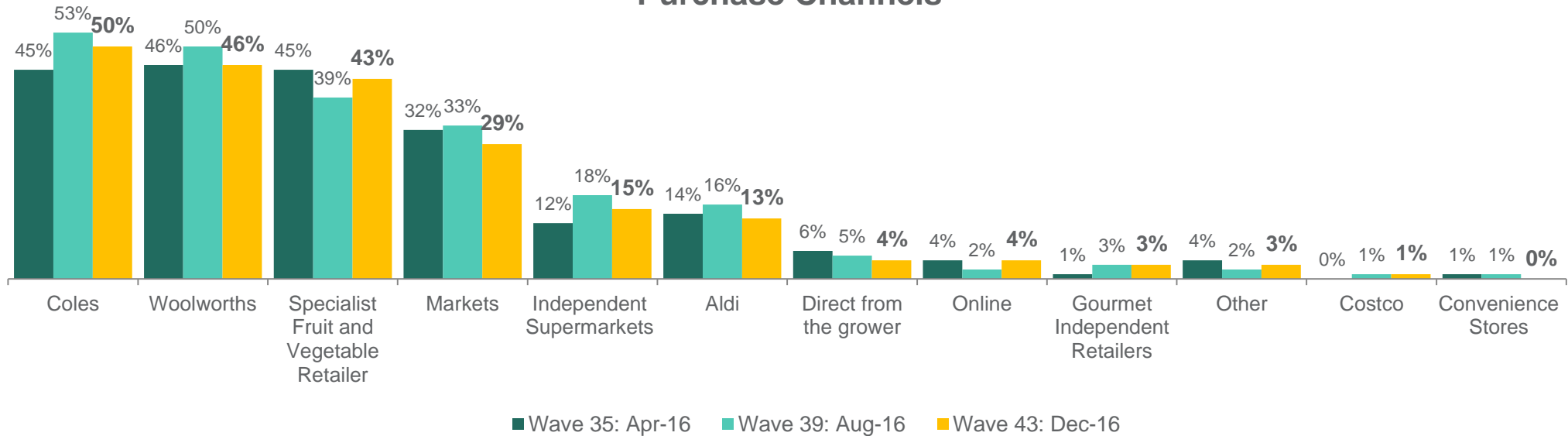


▼ 3.3 times, Wave 35  
 ▼ 2.9 times, Wave 39



▲ 5.3 times, Wave 35  
 ▼ 4.3 times, Wave 39

### 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 35 N=201, Wave 39 N=200, Wave 43 N=202



# Average Spend and Price Sensitivity



Average weight of purchase

On average, consumers purchase **1.0kg** of eggplant, which has increased this wave.

- ▼ 0.9kg, Wave 35
- ▼ 0.8kg, Wave 39



Recalled last spend

Recalled last spend on eggplant purchase is **\$4.70**, higher than the previous waves.

- ▼ \$4.00, Wave 35
- ▼ \$4.10, Wave 39



Value for money

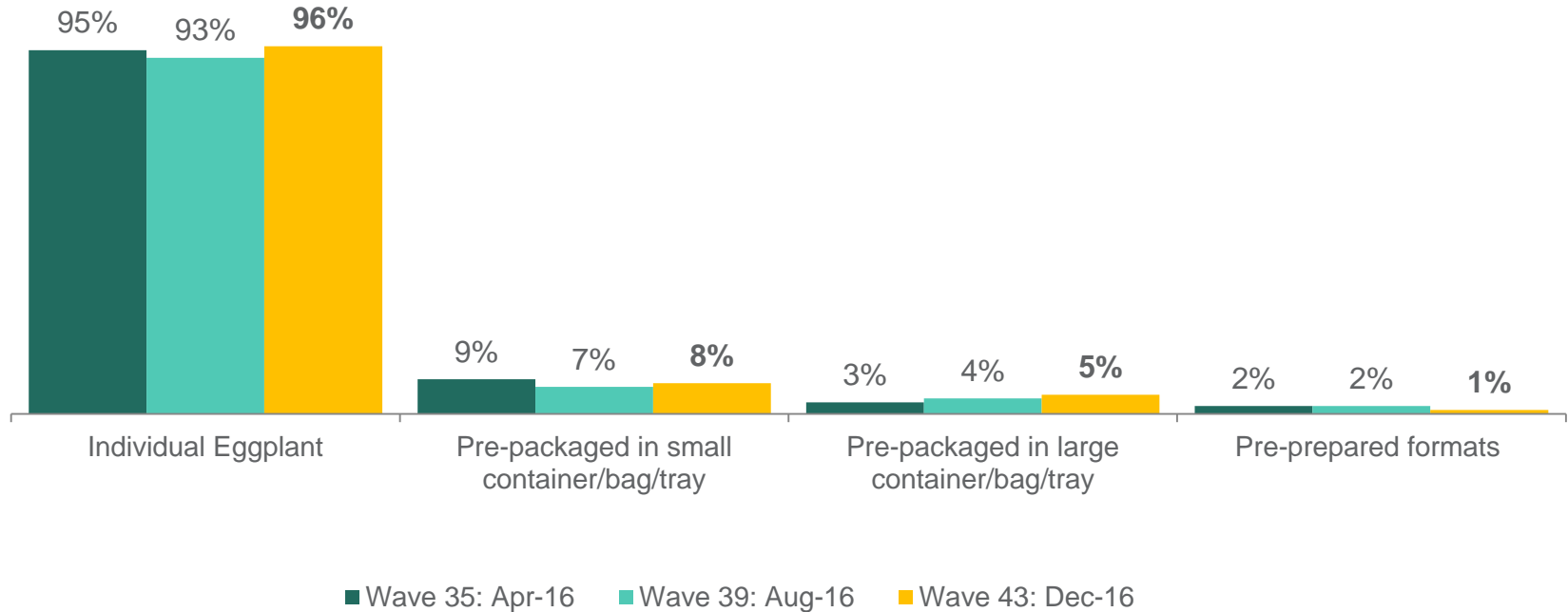
Overall consumers' perceived value for money is fair (**6.1/10**), which is consistent with Wave 39.

- ▲ 6.3/10, Wave 35
- 6.1/10, Wave 39

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 35 N=201, Wave 39 N=200, Wave 43 N=202



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



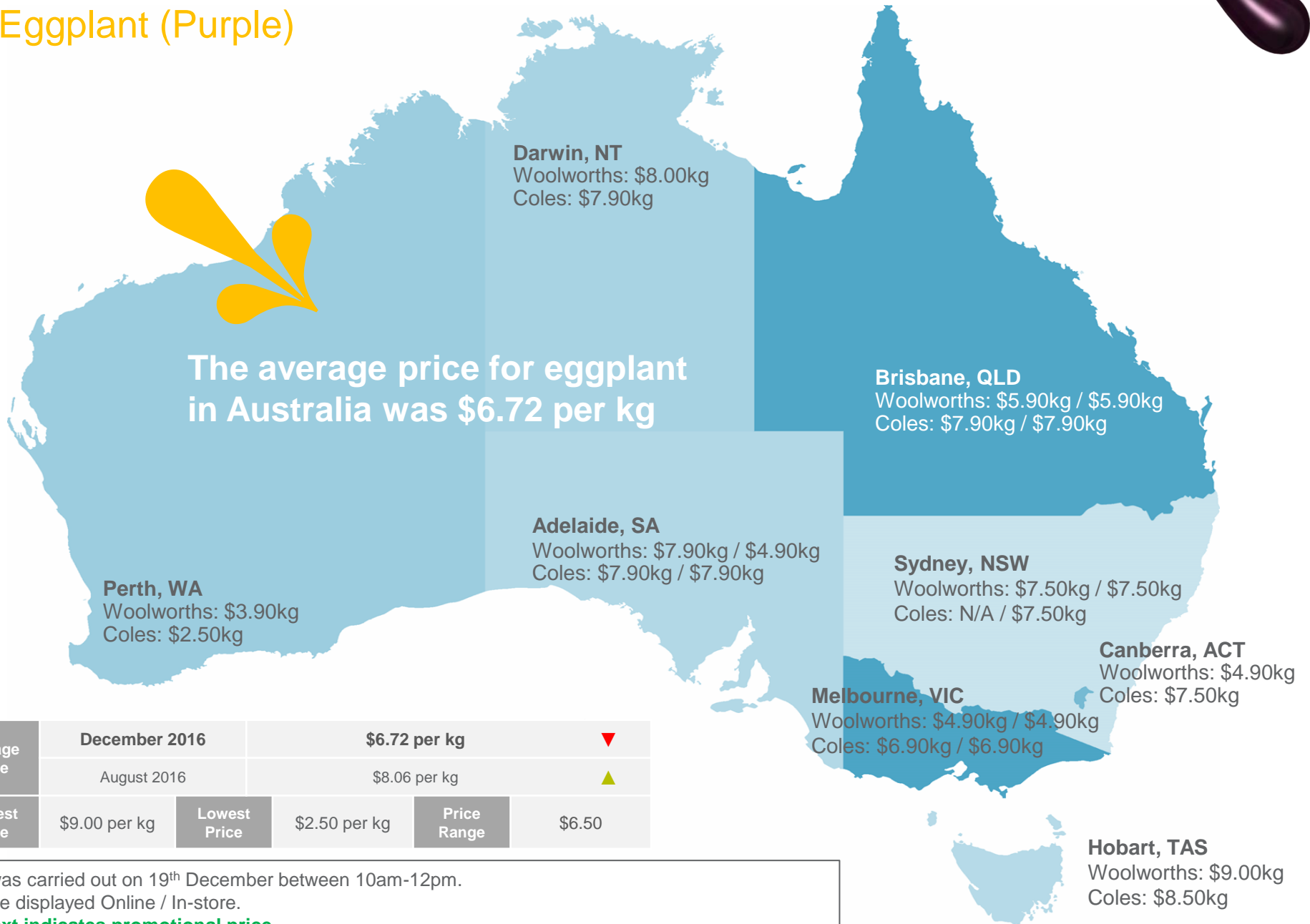
Q4b In what fresh formats do you typically purchase Eggplant?  
Sample Wave 35 N=201, Wave 39 N=200, Wave 43 N=202





# Online and In-store Commodity Prices

## Eggplant (Purple)



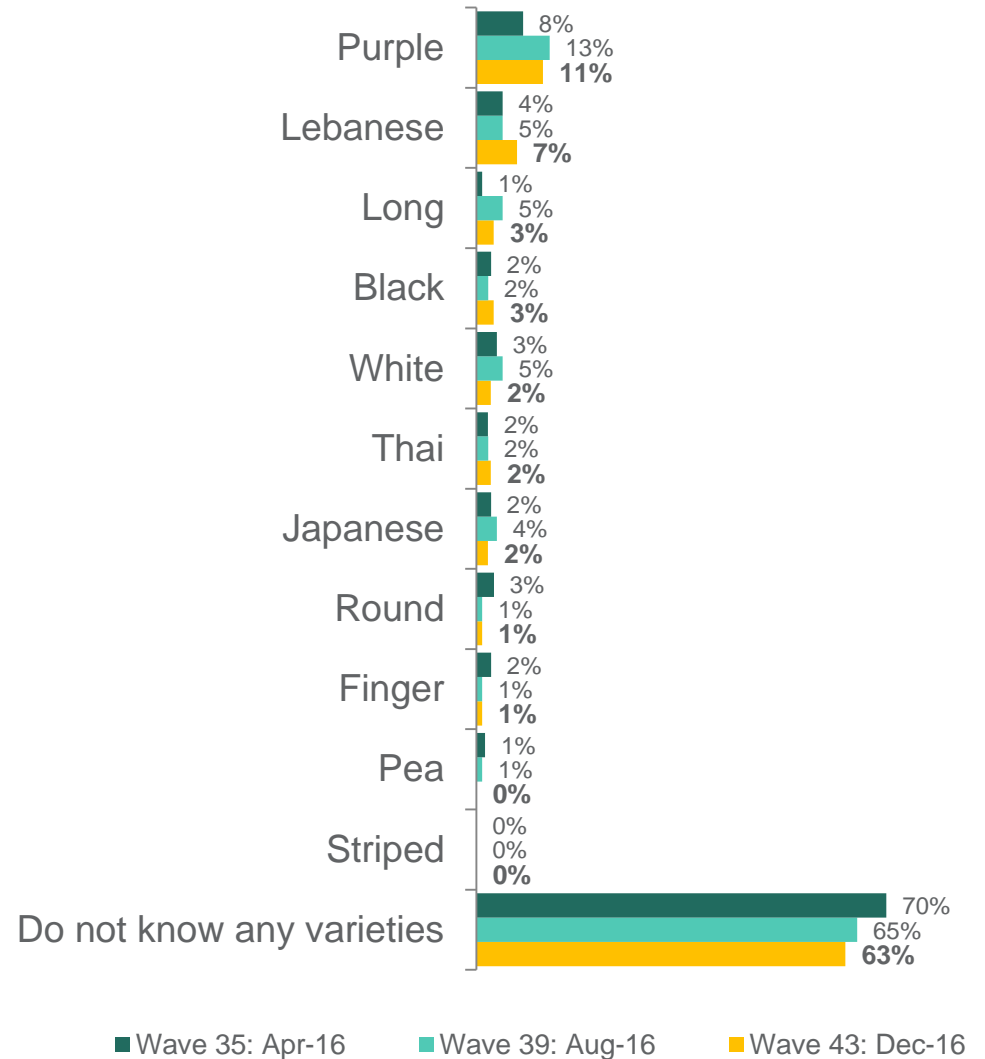
Average Price	December 2016	\$6.72 per kg				▼
	August 2016	\$8.06 per kg				▲
Highest Price	\$9.00 per kg	Lowest Price	\$2.50 per kg	Price Range	\$6.50	

Pricing was carried out on 19<sup>th</sup> December between 10am-12pm.  
 Prices are displayed Online / In-store.  
**Green text indicates promotional price.**



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

Consumers are prompted by colour and location for eggplant varieties.



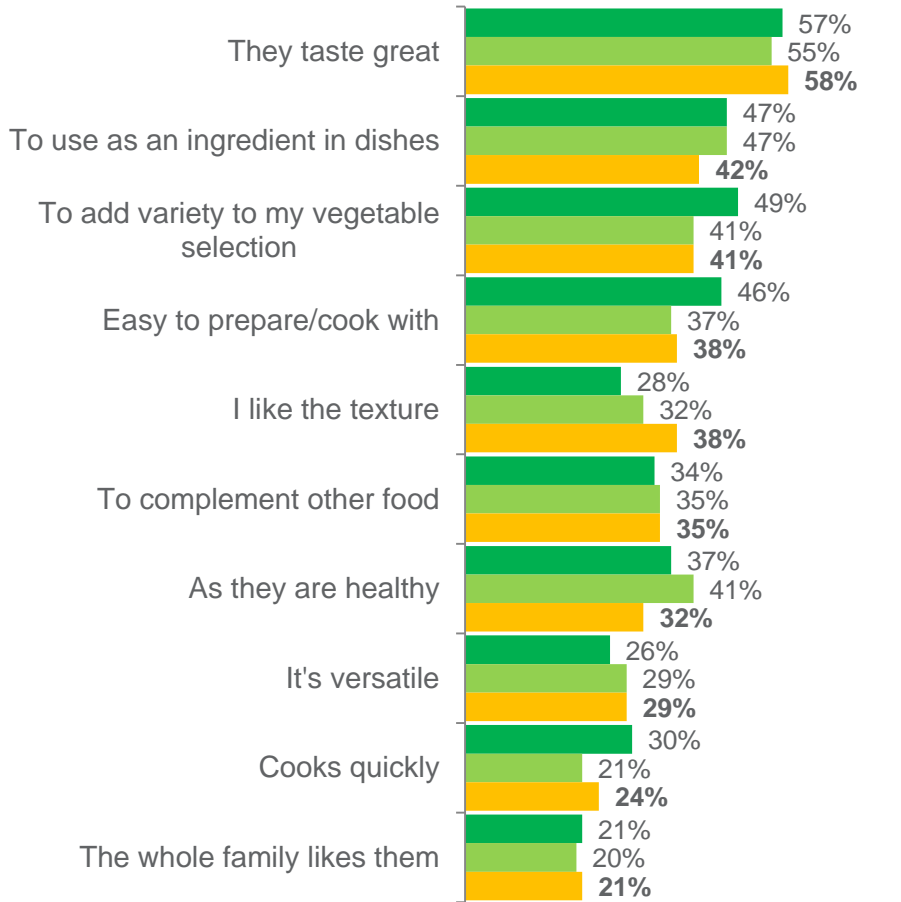
Q6a. What types/varieties of <commodity> are you aware of? (unprompted)  
Sample Wave 35 N=201, Wave 39 N=200, Wave 43 N=202



The key triggers to eggplant purchase are taste and use as an ingredient in dishes. Price and wanting a variety are the key barriers to purchase. Lack of variety available has increased as a barrier to purchase over the last three waves.

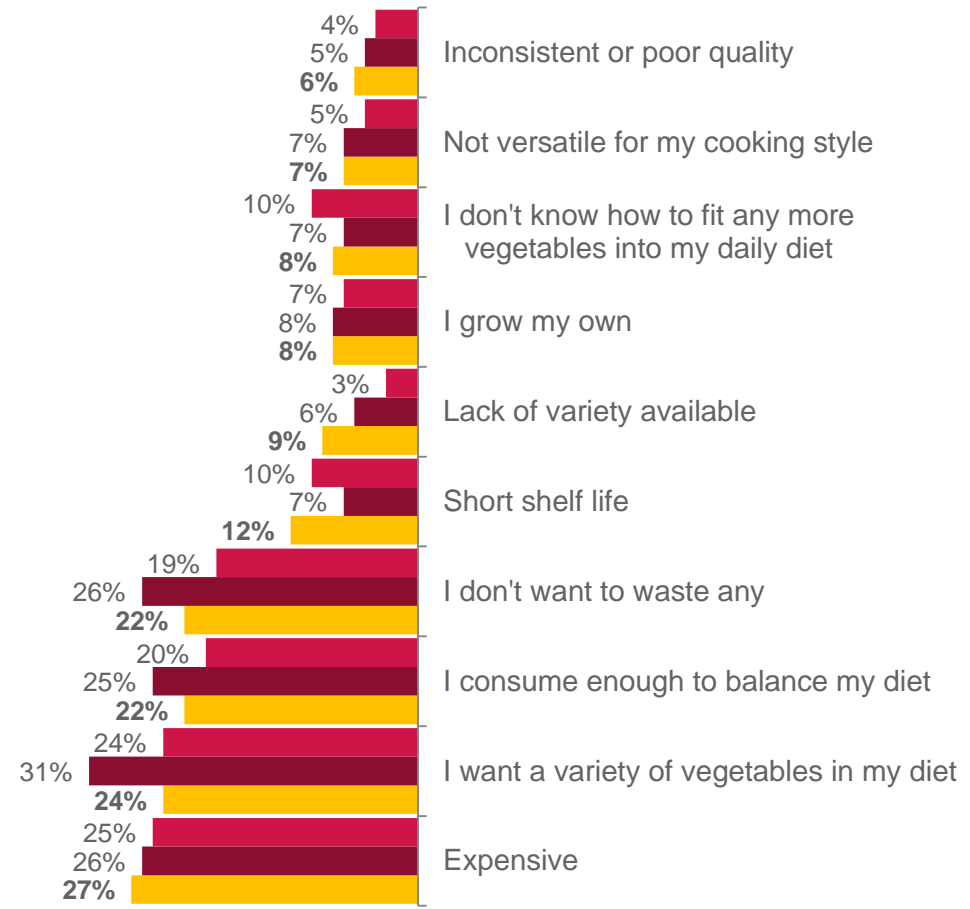


### Triggers



■ Wave 35: Apr-16   ■ Wave 39: Aug-16   ■ Wave 43: Dec-16

### Barriers



■ Wave 35: Apr-16   ■ Wave 39: Aug-16   ■ Wave 43: Dec-16

Q7. Which of the following reasons best describes why you purchase <commodity> ?  
 Q8. Which reason best describes why you don't buy <commodity> more often?  
 Sample Wave 35 N=201, Wave 39 N=200, Wave 43 N=202





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

Dinner remains the main consumption occasion. Nearly one fifth of consumers used eggplant when cooking a new recipe.

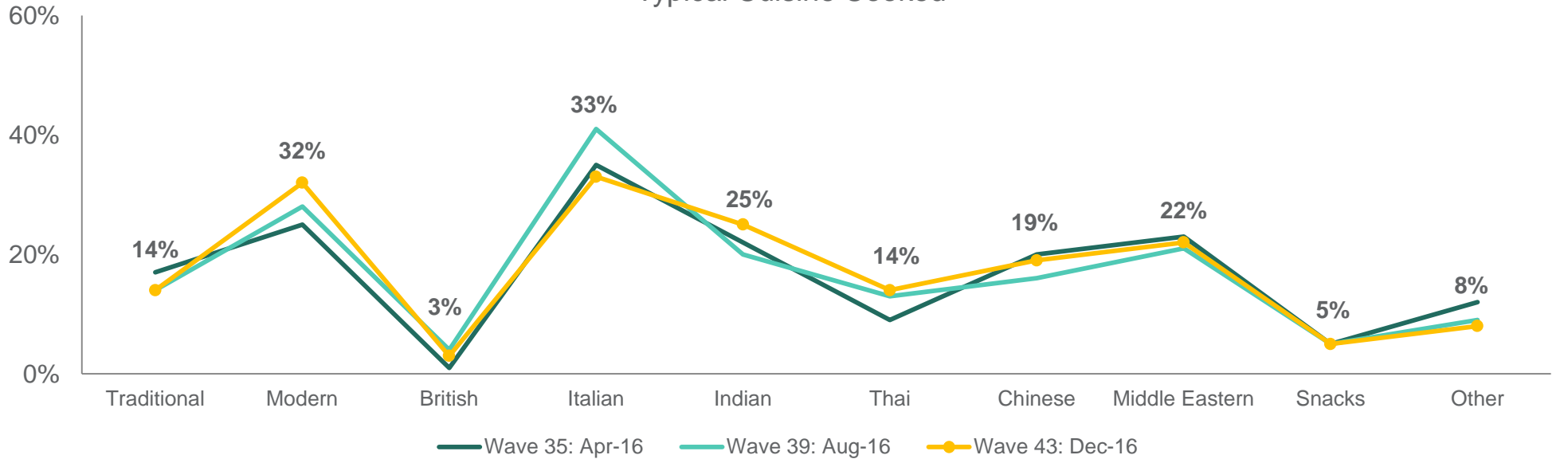
### Top 5 Consumption Occasions

	Wave 39	Wave 43
Dinner	66%	60%
Family meals	55%	54%
Weekday meals	33%	30%
Weekend meals	28%	28%
Quick Meals	19%	25%

**19%**  
used eggplant when cooking a new recipe

▼ 16%, Wave 39

#### Typical Cuisine Cooked



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

Q10. What cuisines do you cook/consume that use <commodity> ?  
 Q11. Which of the following occasions do you typically consume/use <commodity> ?  
 Sample Wave 35 N=201, Wave 39 N=200, Wave 43 N=202

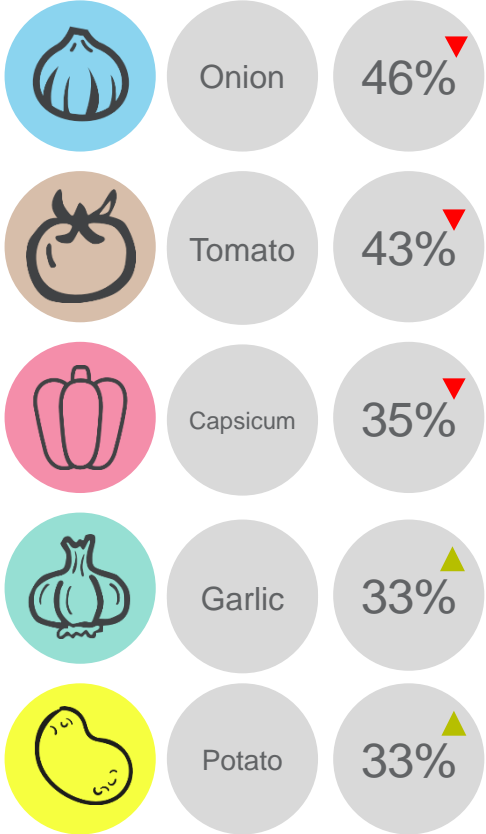


▼ : Indicates LOWER score than current wave.  
 ▲ : Indicates HIGHER score than current wave.



Eggplant is generally served with onions, tomato and capsicums. Consumers prefer to fry, grill and bake eggplant. Slow cooking has increased as a cooking style over the last three waves.

### Accompanying Vegetables



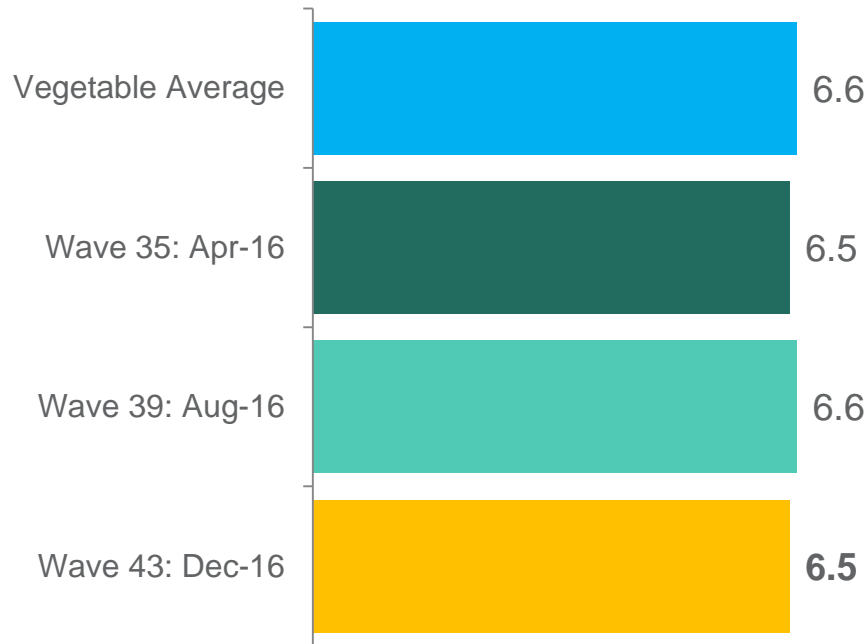
### Top Cooking Styles

	Wave 35	Wave 39	Wave 43
Frying	46%	40%	41%
Grilling	42%	33%	38%
Baking	33%	31%	38%
Stir frying	35%	31%	37%
Roasting	36%	36%	36%
Slow Cooking	13%	22%	27%
Sautéing	26%	29%	27%
Steaming	11%	10%	13%
Boiling	5%	6%	6%
Soup	7%	6%	6%

Q9. How do you typically cook <commodity> ?  
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?  
Sample Wave 35 N=201, Wave 39 N=200, Wave 43 N=202



The importance of provenance remains relatively consistent with the past two waves, which sits slightly below the Vegetable Average. Knowing that eggplants are grown in Australia remains important information for consumers.



Q14. When purchasing Eggplant, how important is Provenance to you?  
Q15. And when purchasing Eggplant, how important is that it is grown in Australia?  
Sample Wave 35 N=201, Wave 39 N=200, Wave 43 N=202

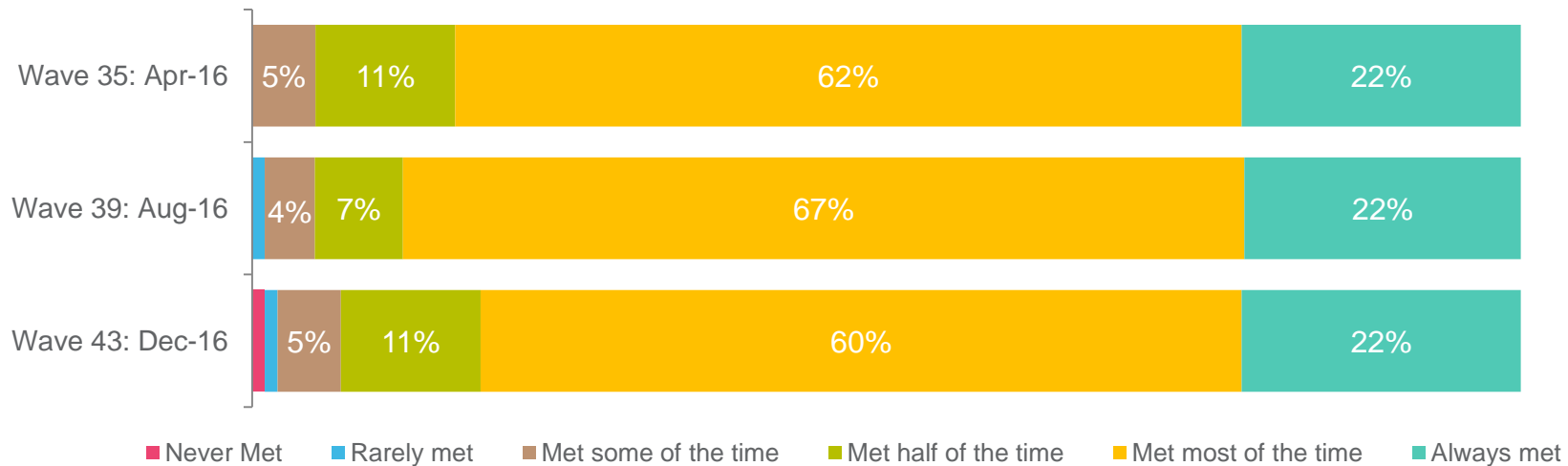


Consumers expect eggplant to remain fresh for just over one week once purchased, relatively consistent with Wave 39. Expectations of freshness are predominantly being met most of the time, however these expectations have declined this wave.

Expected to stay fresh for 7.9 days

- ▼ 7.6 days, Wave 35
- ▲ 8.1 days, Wave 39

### 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 35 N=201, Wave 39 N=200, Wave 43 N=202



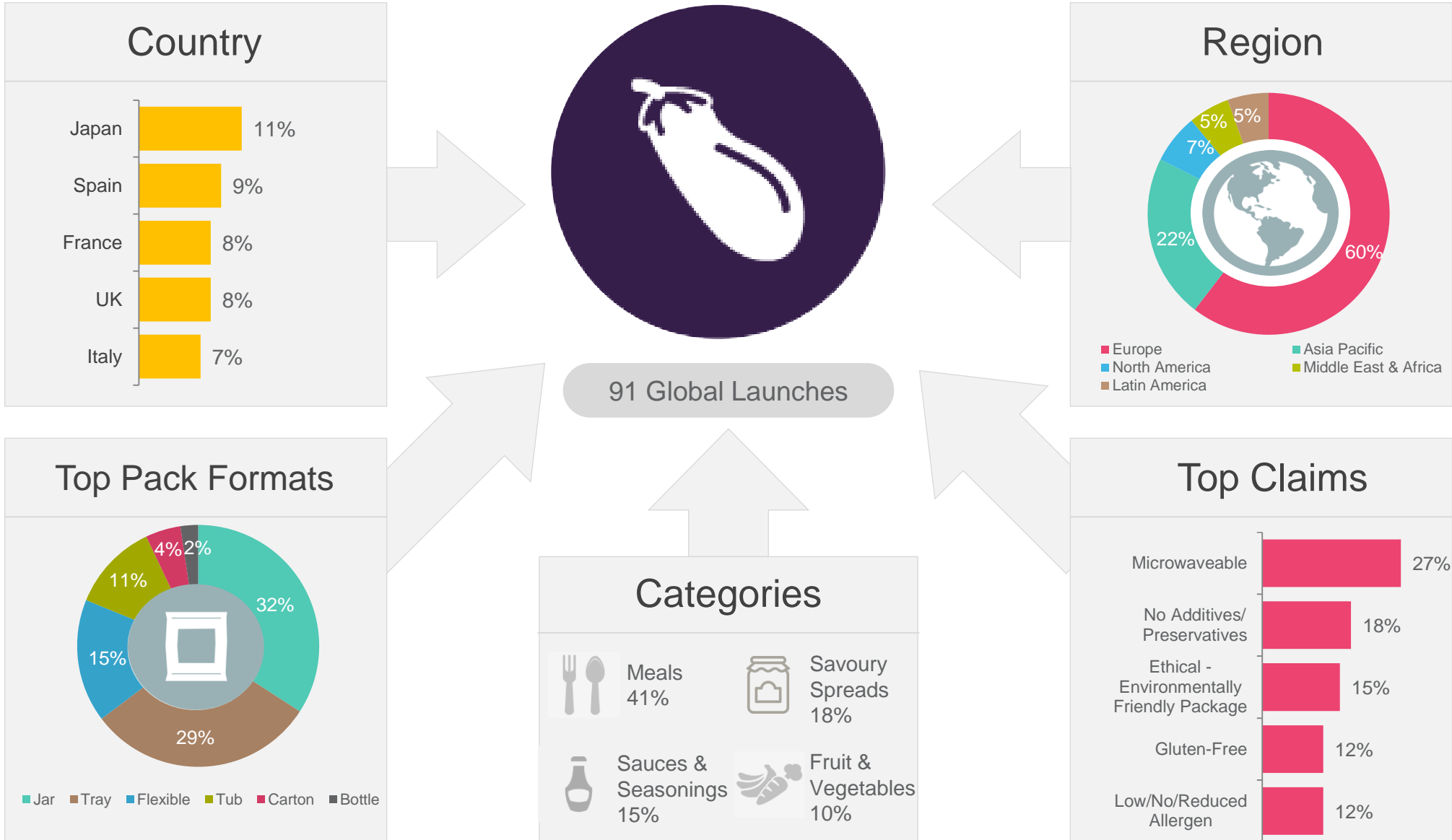
# Trends: Eggplant



# Eggplant Global Launches

## September – December 2016

There were 91 products that contained eggplant as an ingredient launched globally over the last three months. The majority of those launches occurred in Europe. Products launched include meals, savoury spreads, and sauces and seasonings.







# Eggplant Product Launches: Last 3 Months (September – December 2016) Summary

- There were 91 eggplant products launched globally in the last three months.
- There were two products launched in Australia this wave.
- The majority of eggplant launches occurred in Europe (60%) and Asia Pacific (22%).
- Categories for launches were meals (41%), savoury spreads (18%), and sauces & seasonings (15%).
- Key claims used on products included microwaveable (27%), no additives/preservatives (18%), and ethical – environmentally friendly packaging (15%).
- A variety of packaging formats were used including jars (32%), trays (29%), and flexible packaging (15%).
- The most innovative launch this wave included Eggplant Flour from Brazil (other examples can be found in the following pages).



Source: Mintel (2016)

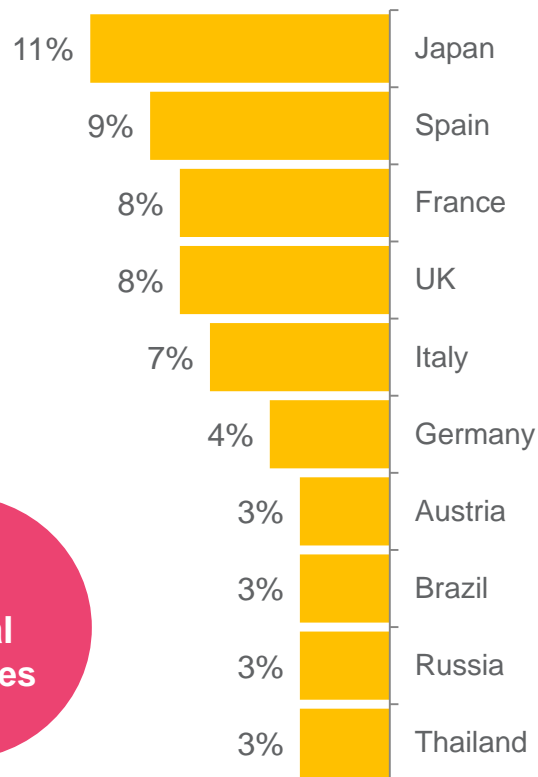




# Eggplant Launches

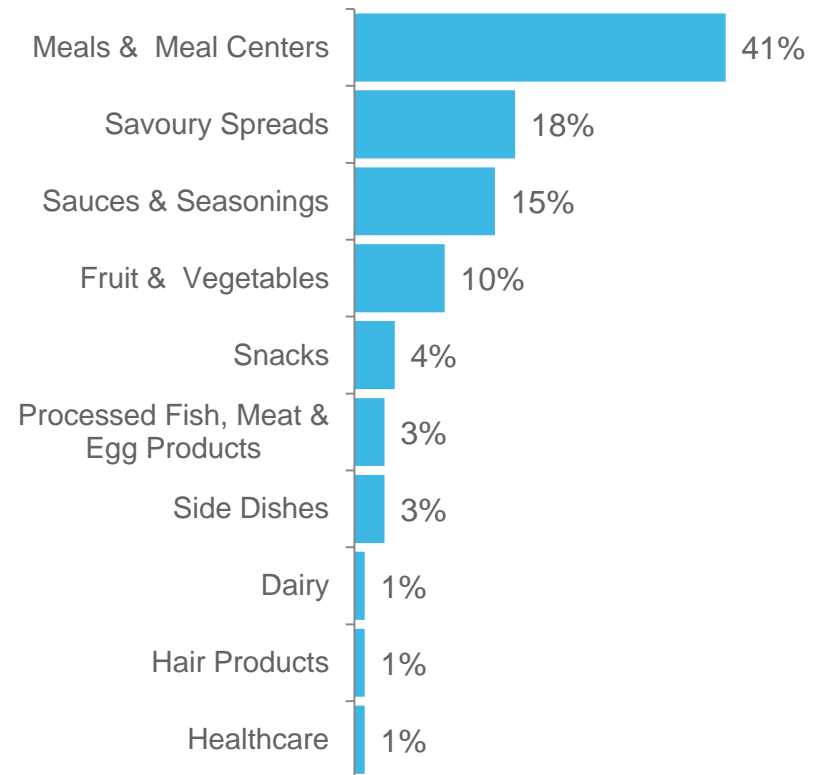
- Countries with the greatest number of launches were Japan, Spain and France.
- Products launched were primarily meals, savoury spreads, sauces, and fruits & vegetables.

## Top Launch Countries



91  
Global  
Launches


## Top Launch Categories





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

### Pack Formats Used

Global		Jar	32%
		Tray	29%
		Flexible	15%
Europe		Jar	36%
		Tray	24%
		Flexible	16%

### Top Claims Used

Global		Microwaveable	27%
		No Additives/Preservatives	18%
		Ethical - Environmentally Friendly Package	15%
Europe		Ethical - Environmentally Friendly Package	16%
		Microwaveable	15%
		Organic	15%

# ➤➤➤ Innovative Eggplant Launches: L3M (September – December 2016)

## Linken Conservas Pickled Mini Scarlet Eggplant (Brazil)

Linken Mini Jiló (Pickled Mini Scarlet Eggplant) has been added to the range. The product is gluten-free and retails in a 550g pack.



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

## Mare Pronto Fish Parmigiana (Italy)

Mare Pronto Parmigiana di Pesce (Fish Parmigiana) is described as belonging to the Mediterranean diet and is made with natural and light fish. The product is ready to eat, comprises eggplant, fish and tomato, contains natural antioxidants, and is rich in omega 3. This meal can be prepared in the oven in 18 minutes or in the microwave in seven minutes, and retails in a 250g pack.



**Claims:**  
Microwaveable, Antioxidant, Ease of Use, Slimming

## Coudène Aubergine Caviar (France)

Coudène Caviar d'Aubergine (Aubergine Caviar) has been relaunched with a new brand name, previously known as Coudène Les Fériades, and in a newly designed 90g pack. This product can be served as an aperitif, as a spread on toasts or breadsticks with vegetables, or can be used as an ingredient for puff pastries.



**Claims:**  
N/A

## Levevis Vegetarian Pizza Verdure (Denmark)

Levevis Pizza Verdure Vegetarisk (Vegetarian Pizza Verdure) is made by Roncadin, an Italian pizza bakery that is situated in the Friuli region at the foot of the Alps. The bakery is known for its crispy pizzas with delicious ingredients. This pizza contains mozzarella, spinach, marinated squash, aubergine, tomato and red and yellow pepper, which are added on top after baking. It is packed and frozen soon after production to preserve flavour and can be baked at home for a crispy and delicious pizza just like the pizzas in Italy.



**Claims:**  
Organic, Vegetarian

# ➤➤➤ Innovative Eggplant Launches: L3M (September – December 2016)

## Sainsbury's Deliciously Freefrom Vegetable Lasagne (UK)

Sainsbury's Deliciously Freefrom Vegetable Lasagne is made with Mediterranean-style vegetables and tomatoes layered with pasta and bechamel sauce. This microwavable and vegan meal is created with care for customers with food allergies and intolerances. It is made with the best ingredients that are free from wheat, gluten and milk. It provides two of the recommended five-a-day portions of fruit and vegetables.



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

## Delhaize Lovely Meals Grilled Eggplant with Minced Meat, Goat Cheese and Cherry Tomatoes (Belgium)

Delhaize Lovely Meals Aubergine Grillée avec Viande Émincée, Fromage de Chèvre et Tomates Cerises (Grilled Eggplant with Minced Meat, Goat Cheese and Cherry Tomatoes) is now available. The product can be microwaved in four minutes, and retails in a 400g pack, featuring cooking instructions.



**Claims:**  
Microwaveable

## ICA Dried Aubergine (Sweden)

ICA Torkad Aubergine (Dried Aubergine) is described as mild and soft, and is excellent in moussaka or baba ganoush. The aubergine is to be soaked in cooked water for 60 minutes prior to use, and retails in a 50g pack featuring cooking instructions.



**Claims:**  
N/A

## Chuck Hughes My Vegetable Farmer's Spicy Antipasto (Canada)

Chuck Hughes My Vegetable Farmer's Spicy Antipasto is now available. This kosher certified product is described as spicy and crunchy, can be used on everything from eggs to pizzas and even on fish or steak, and retails in a 375ml pack, bearing the Aliments Préparés Au Québec logo.



**Claims:**  
Kosher

# »»» Innovative Eggplant Launches: L3M (September – December 2016)

## Pizza Express Artisans Baked Melanzane Aubergine al Forno (UK)

Pizza Express Artisans Baked Melanzane Aubergine al Forno has been launched exclusively to Iceland. The product comprises layers of grilled aubergine, cheese and bechamel sauce with tomatoes, topped with a cheese and herb crumb. The product is suitable for vegetarians, and retails in a 400g partly recyclable pack bearing the Facebook, Twitter and Instagram logos.



**Claims:**  
Vegetarian, Ethical - Environmentally Friendly Package, Social Media

## Campus Eggplant Anchovies (Venezuela)

Campus Anchoas de Berenjenas (Eggplant Anchovies) are now available. The product retails in a 175g pack.



**Claims:**  
N/A

## Pasta Nonna Eggplant and Kashkaval Cheese Ravioli (Israel)

Pasta Nonna Eggplant and Kashkaval Cheese Ravioli are now available. This pasta contains only natural ingredients and no preservatives. The kosher certified product can be cooked in two minutes, and retails in a 400g pack.



**Claims:**  
No Additives/Preservatives, All Natural Product, Kosher

## Empório Nut's Eggplant Flour (Brazil)

Empório Nut's Farinha de Berinjela (Eggplant Flour) has been repackaged. The wholegrain, premium product comprises stabilized flour, and is free from gluten. It is rich in protein and vitamins A, B1, B2, B5, and C, as well as in minerals such as calcium, phosphorus, iron, potassium and magnesium. The product can be used in the preparation of different dishes such as couscous, cakes and salads, and retails in a 120g pack.



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



# Australian Eggplant Launches: L3M (September – December 2016)

## Sandhurst Quinoa & Co. Mixed Quinoa with Eggplant Caponata

Sandhurst Quinoa & Co. Mixed Quinoa with Eggplant Caponata is ready to eat. This gluten-free product can be microwaved, and retails in a 210g pack.



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

## The Real Risotto Roast Vegetable Risotto with Parmesan

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



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



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

# Spring Onion.



Both purchase and consumption frequency have continued to trend upwards this wave.

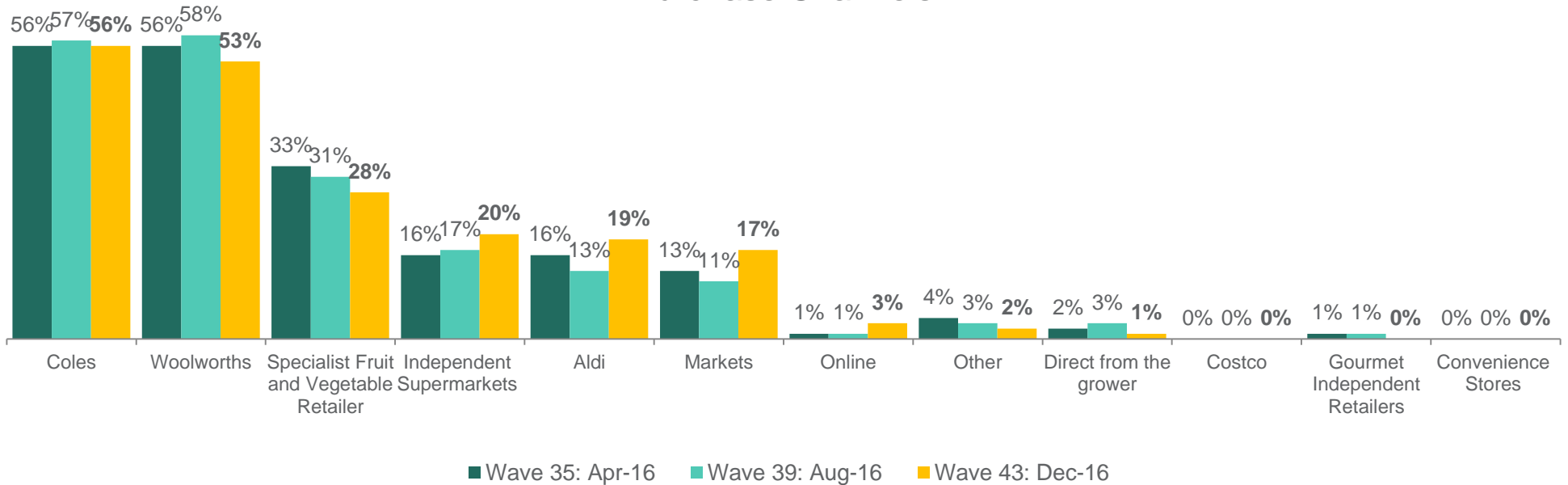
Spring onions are generally purchased from mainstream retailers. Specialist vegetable retailers have continued to experience a downwards trend, which has now lasted over five waves.



▼ 2.6 times, Wave 35  
▼ 3.0 times, Wave 39

▼ 8.2 times, Wave 35  
▼ 8.5 times, Wave 39

### Purchase Channels



Q1. On average, how often do you purchase Spring Onion?  
 Q2. On average, how often do you consume Spring Onion?  
 Q5. From which of the following channels do you typically purchase Spring Onion?  
 Sample Wave 35 N=204, Wave 39 N=202, Wave 43 N=202



# Average Spend and Price Sensitivity



Average weight of purchase

The average consumer typically purchases **500g** of spring onions, which has continued to increase this wave.

- ▼ 300g, Wave 35
- ▼ 400g, Wave 39



Recalled last spend

Recalled last spend on spring onions was **\$2.50**, which is consistent with the previous wave.

- ▼ \$2.40, Wave 35
- \$2.50, Wave 39



Value for money

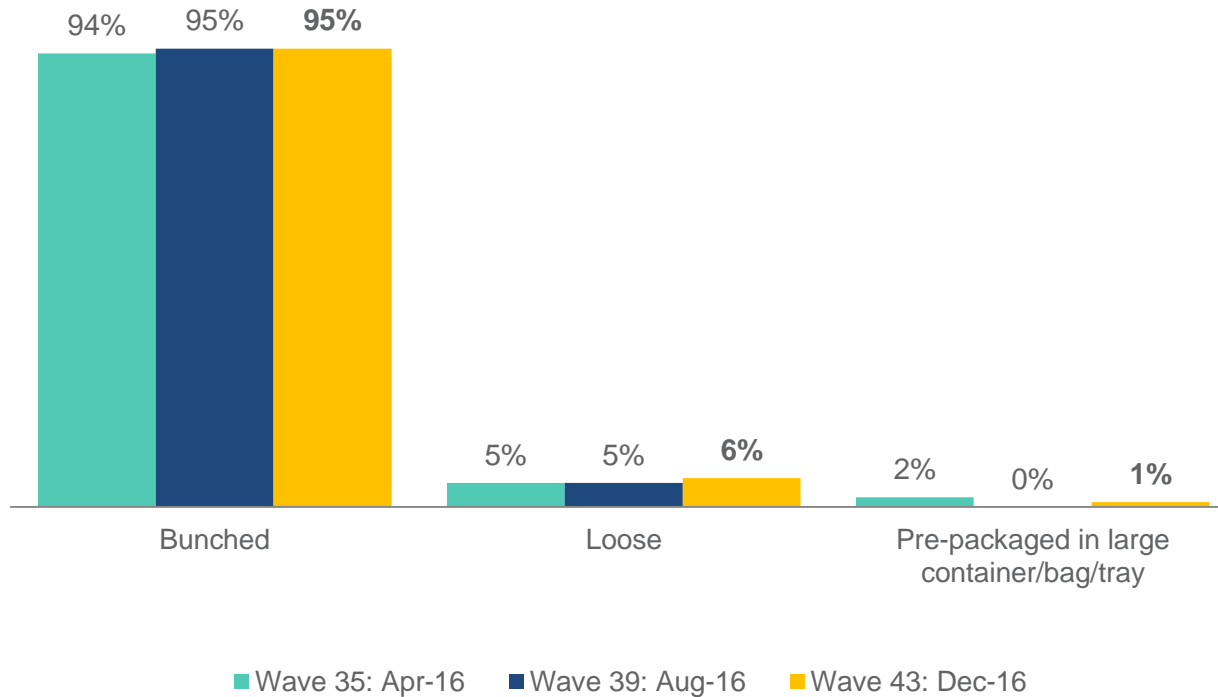
Consumers' perceived value for money is good for spring onions (**6.9/10**), which has noticeably increased this wave.

- ▼ 6.2/10, Wave 35
- ▼ 6.2/10, Wave 39

Q3. How much Spring Onion do you typically purchase when you shop for it?  
 Q3b. To the best of your memory how much did this cost on your most recent typically purchase?  
 Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)  
 Sample Wave 35 N=204, Wave 39 N=202, Wave 43 N=202



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

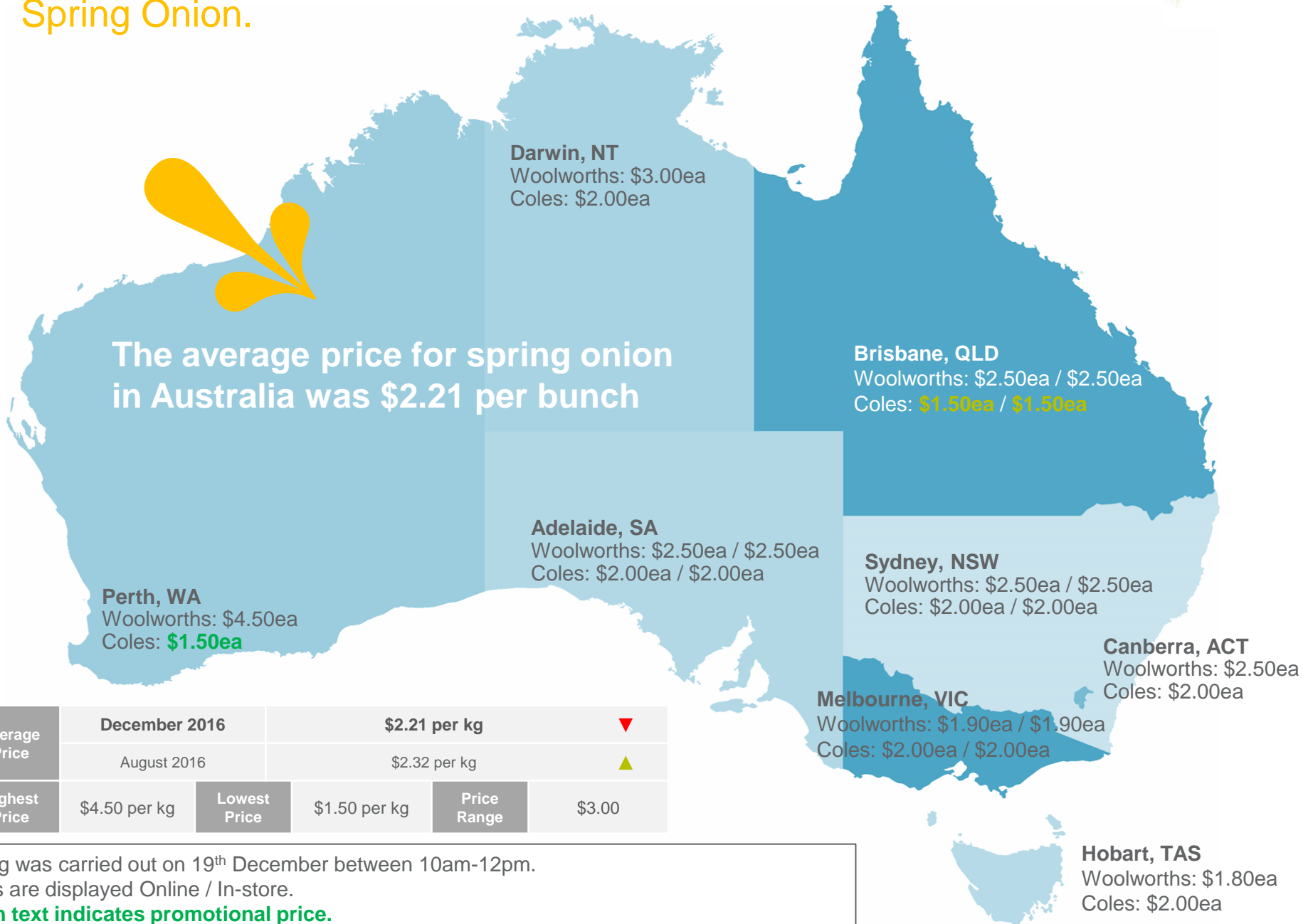


Q4b In what fresh formats do you typically purchase Spring Onion?  
Sample Wave 35 N=204, Wave 39 N=202, Wave 43 N=202



# Online and In-store Commodity Prices.

## Spring Onion.





Awareness of spring onion varieties remains low, with 82% of consumers unable to recall a type.

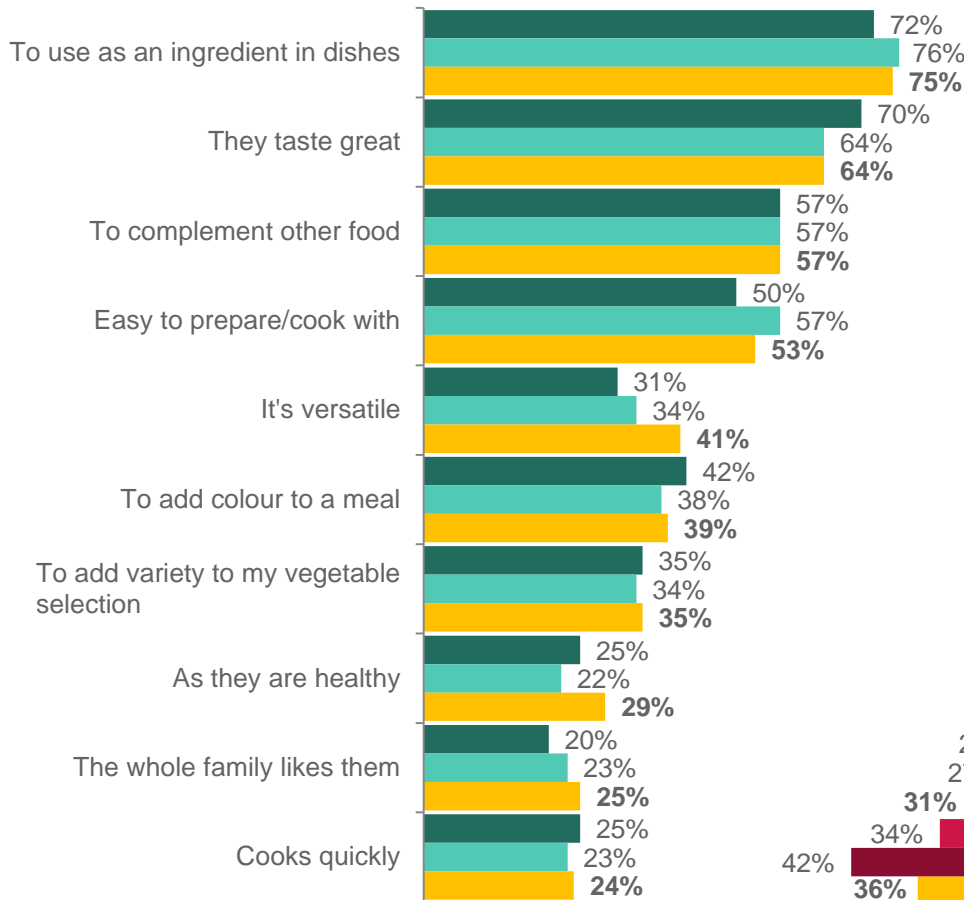




Using spring onion as an ingredient in dishes, tasting great and complementing other foods remain the key drivers of purchase. In contrast, the key barriers are not wanting to waste any, and already consuming enough to balance their diet. Versatility has increased as a trigger to purchase over the last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

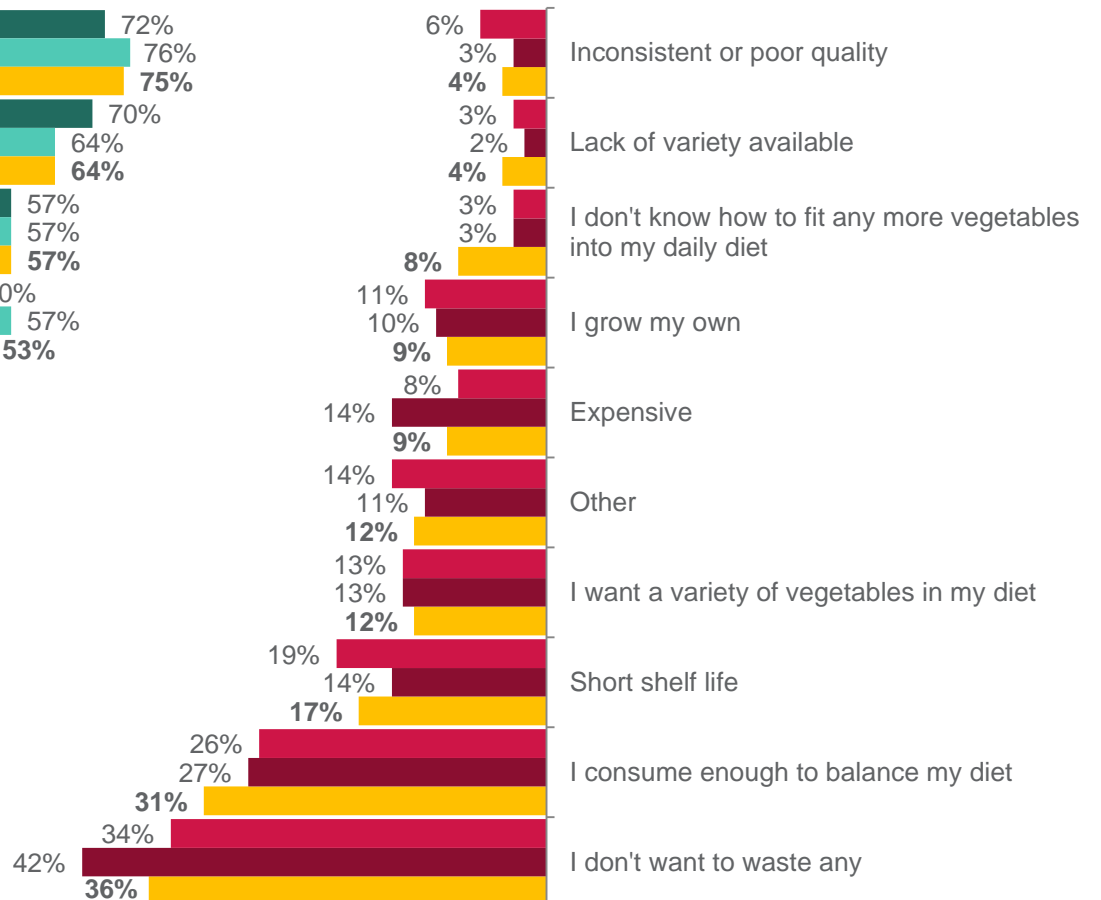


### Triggers



■ Wave 35: Apr-16 ■ Wave 39: Aug-16 ■ Wave 43: Dec-16

### Barriers



■ Wave 35: Apr-16 ■ Wave 39: Aug-16 ■ Wave 43: Dec-16

Q7. Which of the following reasons best describes why you purchase Spring Onion?  
 Q8. Which reason best describes why you don't buy Spring Onion more often?  
 Sample Wave 35 N=204, Wave 39 N=202, Wave 43 N=202





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

Meal occasions tend to occur at dinner.

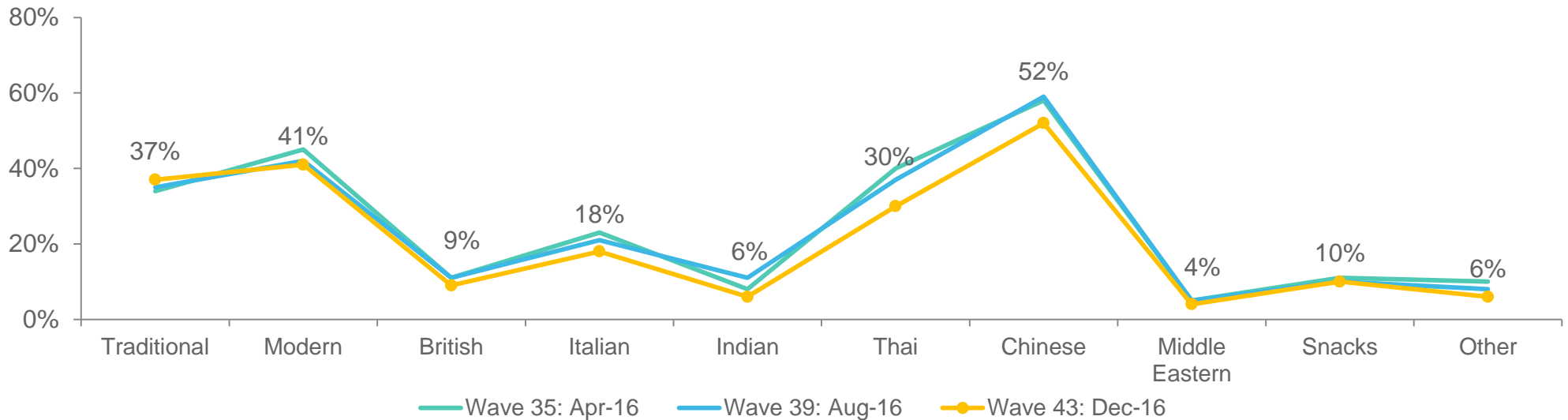
### Top 5 Consumption Occasions

	Wave 39	Wave 43
Dinner	69%	71%
Family meals	60%	61%
Quick Meals	52%	52%
Weekday meals	44%	42%
Weekend meals	41%	42%

**18%** used spring onions when cooking a new recipe

▲ 23%, Wave 39

### Typical Cuisine Cooked



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

Q10. What cuisines do you cook/consume that use Spring Onion?  
 Q11. Which of the following occasions do you typically consume/use Spring Onion?  
 Sample Wave 35 N=204, Wave 39 N=202, Wave 43 N=202

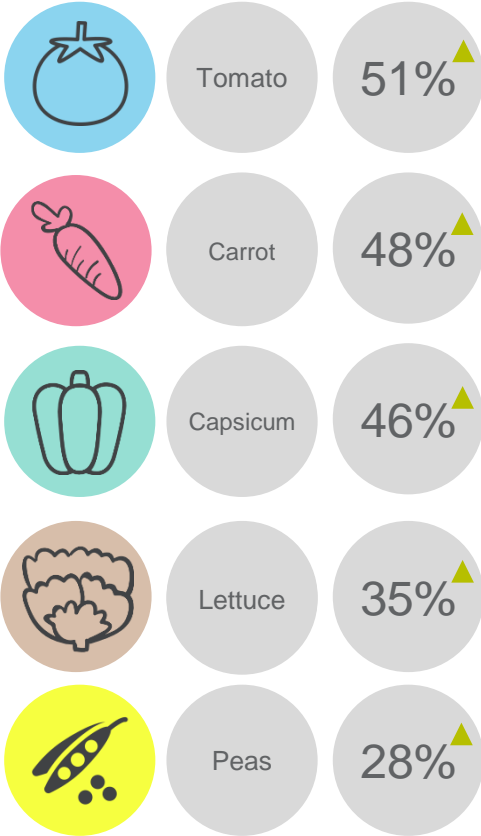


▼: Indicates LOWER score than current wave.  
 ▲: Indicates HIGHER score than current wave.



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

### Accompanying Vegetables



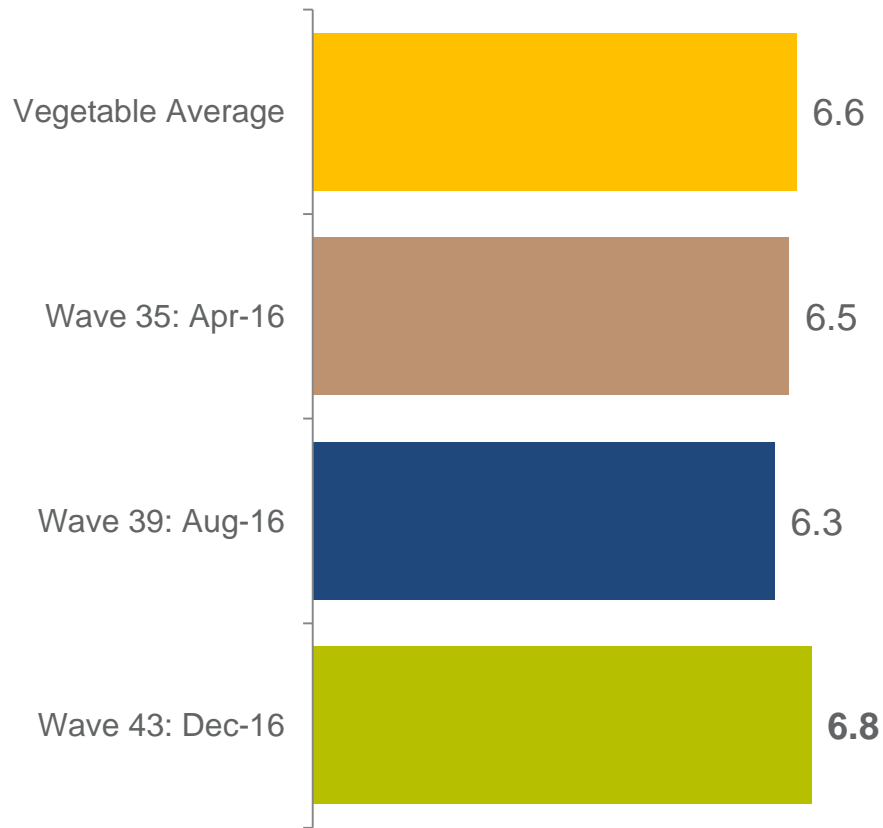
### Top Cooking Styles

	Wave 35	Wave 39	Wave 43
Stir frying	72%	74%	63%
Raw	49%	51%	56%
Sautéing	26%	31%	25%
Frying	22%	30%	24%
Soup	30%	32%	17%
Slow Cooking	15%	16%	9%
Steaming	8%	6%	7%
Baking	8%	7%	7%
Other	5%	4%	7%
Roasting	5%	5%	6%

Q9. How do you typically cook Spring Onion?  
Q10a. And when are you serving Spring Onion which of the following do you also serve together with this?  
Sample Wave 35 N=204, Wave 39 N=202, Wave 43 N=202



The importance of provenance increased this wave and sits above the Vegetable Average. Knowing that spring onions are grown in Australia is still the most important provenance information for consumers.



Q14. When purchasing Spring Onion, how important is Provenance to you?  
 Q15. And when purchasing Spring Onion, how important is that it is grown in Australia?  
 Sample Wave 35 N=204, Wave 39 N=202, Wave 43 N=202



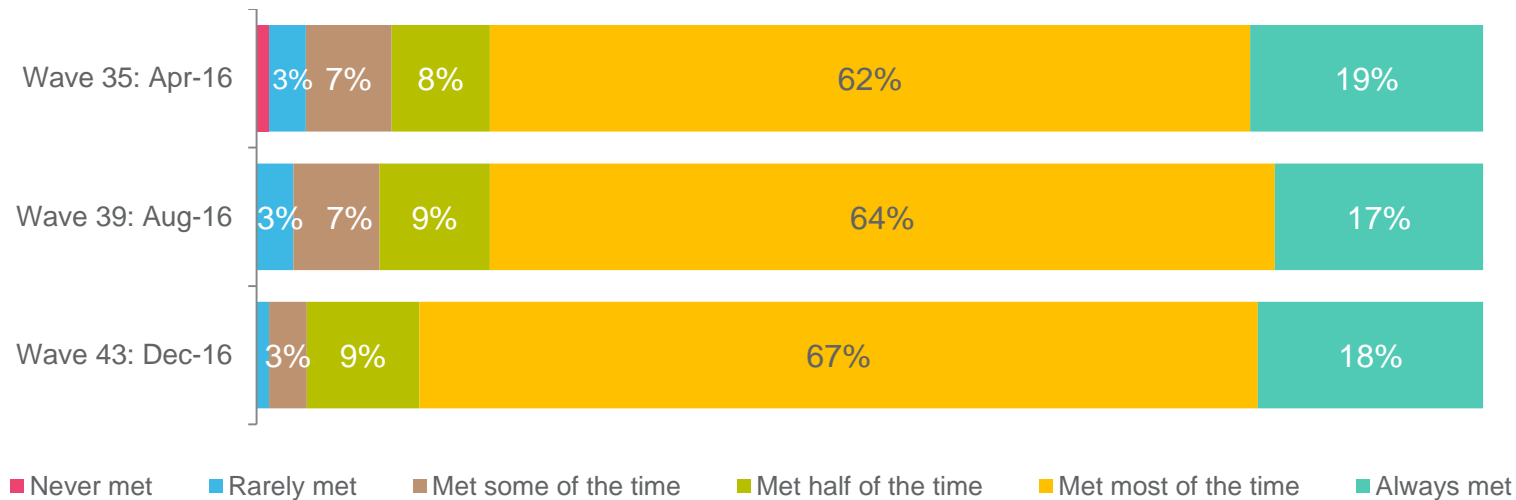
Consumers expect spring onions to remain fresh for over 9 days once purchased, with these expectations being met at least most of the time.

Expected to stay fresh for 9.5 days

▼ 8.8 days, Wave 35

▼ 8.9 days, Wave 39

### Expectations Met



Q12. How long do you expect Spring Onion to stay fresh for, once you have purchased it?  
Q13. How often is this length of freshness met when you buy Spring Onion?  
Sample Wave 35 N=204, Wave 39 N=202, Wave 43 N=202

A close-up photograph of several fresh spring onions with their green stalks and white bulbous bases. The onions are arranged in a slightly overlapping manner, creating a sense of depth and texture. The lighting is soft, highlighting the natural colors and slight sheen of the vegetable.

# Spring Onion Product Launch Trends.

# Spring Onion Global Launches

## September – December 2016

There were 386 spring onion products launched globally over the last three months. The majority of launches were in South Korea and China. Categories for launches were meals and sauces & seasonings. Key packaging for spring onion products were flexible formats.





## Spring Onion Product Launches: Last 3 Months (September – December 2016) Summary

- There were 386 launches in the past 3 months globally that contained spring onions as an ingredient.
- There were 9 products launched in Australia over the past three months.
- Asia Pacific (64%) and Europe (24%) were the key regions for launches.
- Flexible packaging (37%), and tubs (21%) were the most common formats used for products.
- The main categories for launches were meals (38%), seasonings & sauces (22%), and snacks (11%).
- Claims used on products included microwaveable (26%), no additives/preservatives (21%), and time/speed (21%).
- The most innovative product launched was Onion & Chive Wraps from China. Other examples can be found in the following pages.



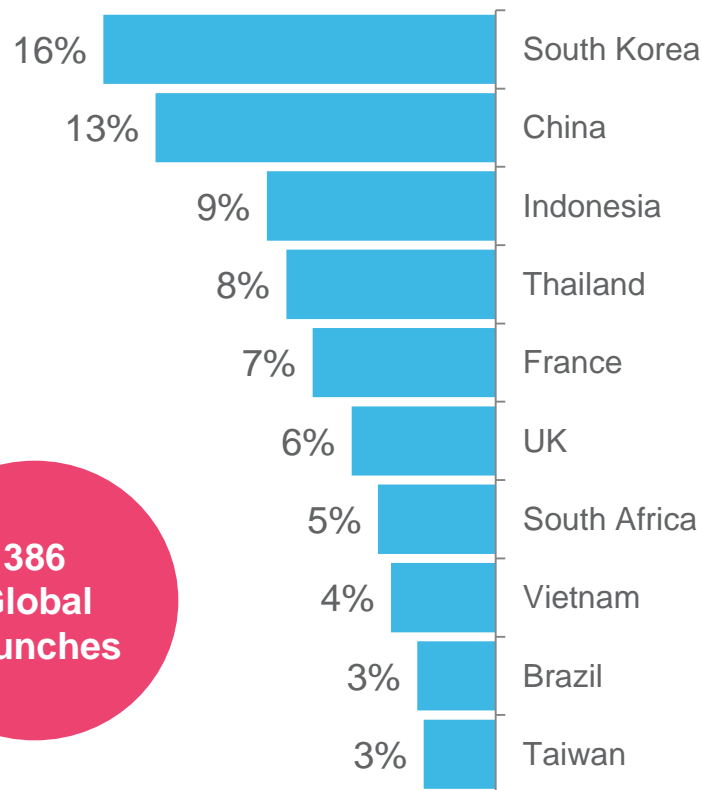
Source: Mintel (2016)



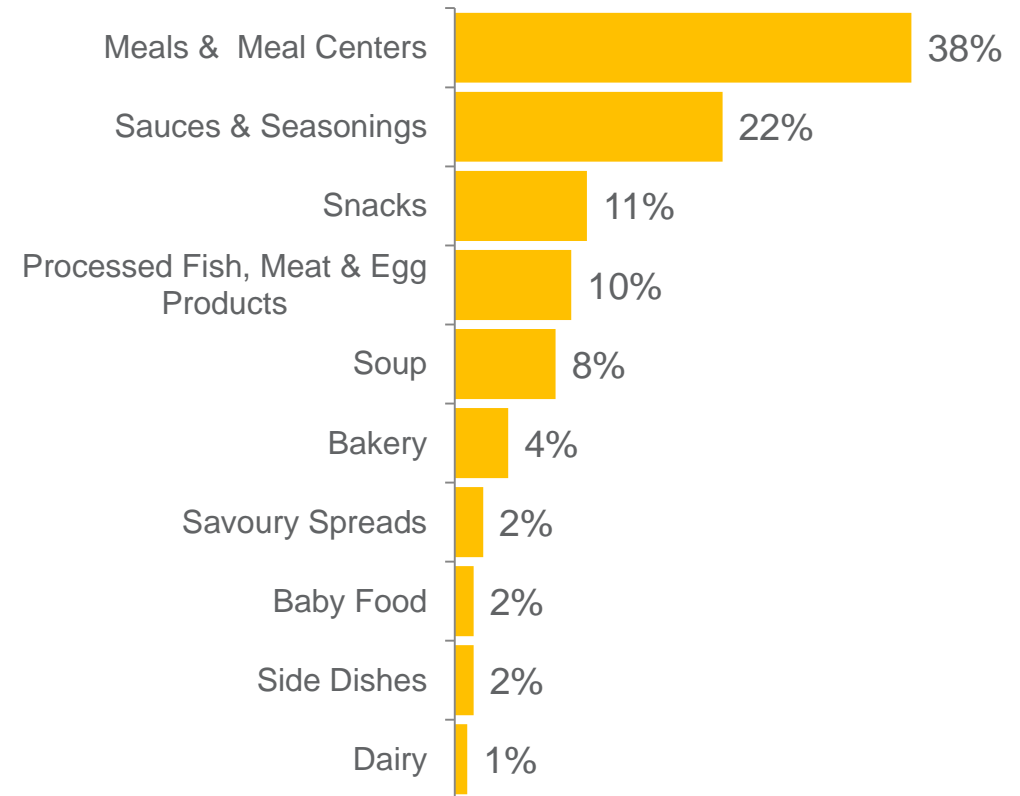


The majority of launches occurred in South Korea and China. The key categories for spring onion launches are meals, sauces & seasonings, snacks, and processed products.

### Top Launch Countries



### Top Launch Categories












**386  
Global  
Launches**












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

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

### Pack Formats Used

<b>Global</b>		Flexible	37%
		Tub	21%
		Tray	11%
<b>Asia Pacific</b>		Flexible	43%
		Tub	18%
		Flexible sachet	13%
<b>Europe</b>		Flexible	22%
		Tub	22%
		Tray	17%

### Top Claims Used

<b>Global</b>		Microwaveable	26%
		No Additives/Preservatives	21%
		Time/Speed	21%
<b>Asia Pacific</b>		Microwaveable	25%
		Time/Speed	24%
		Halal	21%
<b>Europe</b>		Ethical - Environmentally Friendly Package	32%
		No Additives/Preservatives	29%
		Microwaveable	27%

Only regions with n >30 are displayed



# Innovative Spring Onion Launches: L3M (September – December 2016)

## Morrison's a Taste of Asia Green Thai Chicken Curry with Jasmine Rice (UK)

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



**Claims:**  
Microwaveable, Ethical - Environmentally Friendly Package

## Jumbo Jamie Oliver 'Crazy' Rainbow Carrots (Netherlands)

Jumbo Jamie Oliver 'Crazy' Regenboog Wortelen (Rainbow Carrots) are now available. This vegetable dish with carrots, shallots, ginger, and thyme can be oven-baked in 18 minutes and retails in a 400g pack featuring Gezondere Keuze (Healthier Choice) logo.



**Claims:**  
Cobranded

## Confraria Grill Baguette Type Garlic Bread with Cheese (Brazil)

Confraria Grill Pão de Alho Com Queijo Tipo Baguete (Baguette Type Garlic Bread with Cheese) is now available. The product retails in a recyclable 300g pack containing five units.



**Claims:**  
Ethical - Environmentally Friendly Package

## Loves Flower Peanut Flavoured Nougat Biscuit (China)

Loves Flower Hua Sheng Kou Wei Bao Jiang Niu Zha Bing (Peanut Flavoured Nougat Biscuit) combines delicious peanut butter, classic and rich nougat and crispy soda biscuit. This halal certified product retails in a 112g pack containing individual units.



**Claims:**  
Halal



# Innovative Spring Onion Launches: L3M (September – December 2016)

## Riying / Ri Ying Shallot Soda Biscuit (China)

Riying / Ri Ying Xiang Cong Su Da Bing Gan (Shallot Soda Biscuit) is QS certified. The product retails in a 500g pack containing individual units.



**Claims:**  
N/A

## Cuisine Poirier Garden Herbs Dip (Canada)

Cuisine Poirier Garden Herbs Dip is described as fresh and natural dip made with quality ingredients and a home-style mayonnaise. This gluten-free product contains no additives and retails in a 340ml pack bearing the Aliments du Québec logo.



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

## Mission Onion & Chive Wraps (China)

Mission Xiang Cong Juan Bing (Onion & Chive Wraps) have been repackaged. They are suitable for travelling. This halal certified product is microwaveable, and now retails in a newly designed 270g pack containing six slices.



**Claims:**  
Microwaveable, Halal, On-the-Go

## Shoprite Checkers Ready to Braai Jalapeno Poppers (South Africa)

Shoprite Checkers Ready to Braai Jalapeno Poppers are cream cheese stuffed jalapeno chillies wrapped in streaky bacon. This conveniently prepared product can be cooked on the braai in 10 minutes or in the oven in 20 minutes. The product is suitable for carb conscious consumers and home freezing and retails in a 360g pack.



**Claims:**  
Ease of Use



# Innovative Spring Onion Launches: L3M (September – December 2016)

## Bute Island Foods Spring Onion & Cracked Black Pepper Creamy Sheese (Finland)

Bute Island Foods Creamy Sheese Keväsipuli ja Mustapippuri Levittävä Kasvirasvaalmiste (Spring Onion & Cracked Black Pepper Creamy Sheese) is described as a delicious alternative to conventional cream cheese. The kosher certified product is free from gluten, lactose, GMO, and palm oil. It is suitable for vegans, contains no animal ingredients, and retails in a 255g pack.



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

## Saffron Road Bowls Authentic Thai Lemongrass Basil Fish (USA)

Saffron Road Bowls Authentic Thai Lemongrass Basil Fish is made with rice noodles. The product comprises tender and light wild-caught Alaskan pollock, crunchy green bell peppers, snow peas and onions in a complex lemongrass basil sauce. It contains Omega-3, is free from gluten, artificial flavors and preservatives, and can be microwaved or oven baked.



**Claims:**  
No Additives/Preservatives, Microwaveable, Halal, Gluten-Free, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Social Media

## Cheonyeondama Premium Natural Seasoning (South Korea)

Cheonyeondama Premium Natural Seasoning comprises nine 100% natural real ingredients: anchovy, king oyster mushroom, shrimp, kombu, garlic, clam flesh, spring onion and onion. This product is made with premium natural ingredients and contains no additives. It retails in a 48g pack containing 8 x 6g units with an easy-cut opening.



**Claims:**  
No Additives/Preservatives, All Natural Product, Premium, Convenient Packaging

## I Am Super Grains Super Bulgur with Chickpea & Chives (UK)

I Am Super Grains Super Bulgur with Chickpea & Chives is a natural good source of fibre and protein that can help contribute to the growth of muscle mass and can also help to the maintenance of normal bones. The pre-cooked, ready to eat product can be heated up in 60 seconds, is microwaveable and is suitable for vegetarians and vegans. It is said to makes it easy to eat healthy delicious food, is low in saturated fat, contains nothing artificial, and can be eaten hot or cold.



**Claims:**  
No Additives/Preservatives, All Natural Product, Low/No/Reduced Calorie, High/Added Fiber, Microwaveable, Vegetarian, Wholegrain, Bone Health, Vegan, Ease of Use, No Animal Ingredients, Weight & Muscle Gain, Low/No/Reduced Saturated Fat, Social Media





# Australian Spring Onion Launches: L3M (September – December 2016)

## Five Tastes Thai Stir Fry Shots with Basil & Chilli

Five Tastes Thai Stir Fry Shots with Basil & Chilli is described as a concentrated stir fry paste with no mess and no waste. It is free from artificial colours, flavours, preservatives, and added MSG. The product retails in a 180g pack containing four 45g pack featuring the Facebook and Twitter logos.



**Claims:**  
No Additives/Preservatives, Ease of Use, Social Media

## Yumi's Anytime Creamy Tuna Mousse

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



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

## Coles Thai Spiced Chicken Breast Fillets

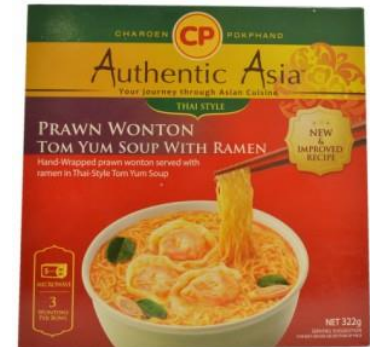
Coles Thai Spiced Chicken Breast Fillets are now available. This product consists of Australian RSPCA approved chicken in a Thai spice marinade. It retails in 400g pack sufficient for two servings.



**Claims:**  
Ethical - Animal

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

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



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



Radish.







Average purchase and consumption of radish has declined this wave.

Radish is generally purchased from mainstream retailers such as Woolworths and Coles. Specialist vegetable retailers are also a popular purchase channel.

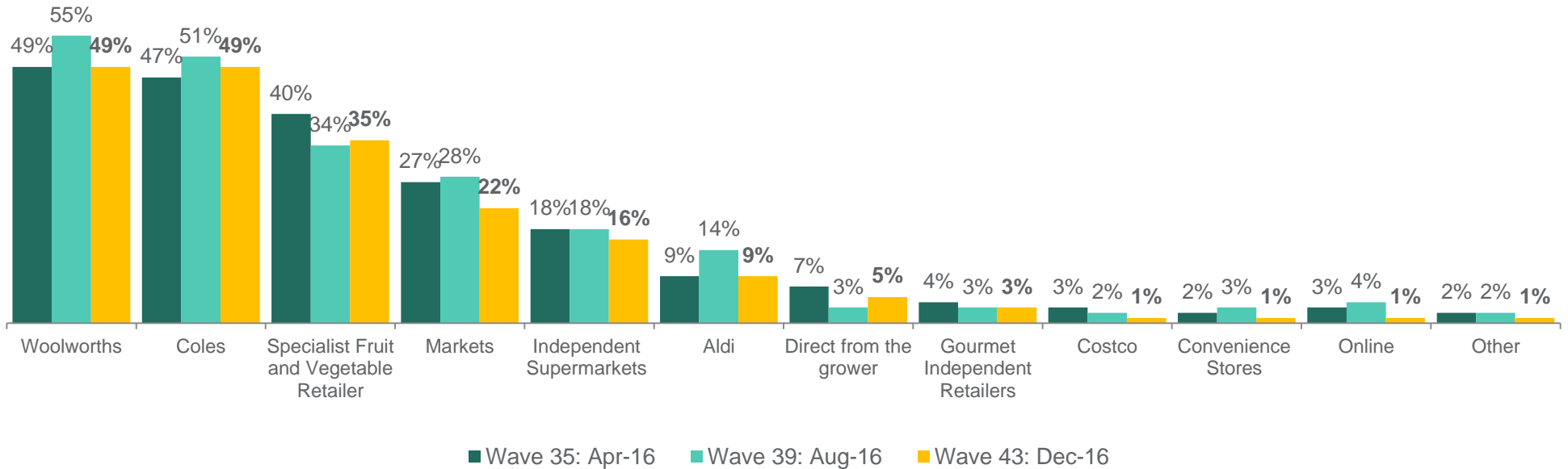


- ▲ 3.9 times, Wave 35
- ▲ 4.8 times, Wave 39



- ▲ 9.8 times, Wave 35
- ▲ 9.7 times, Wave 39

### Purchase Channels



Q1. On average, how often do you purchase Radish?  
 Q2. On average, how often do you consume Radish?  
 Q5. From which of the following channels do you typically purchase Radish?  
 Sample Wave 35 N=202, Wave 39 N=202, Wave 43 N=205



# Average Spend and Price Sensitivity



Average weight of purchase

The average consumer typically purchases **500g** of radish, which has declined this wave.

- ▲ 600g, Wave 35
- ▲ 700g, Wave 39



Recalled last spend

Recalled last spend on radish was **\$3.30**, which has returned to spend seen in Wave 35.

- \$3.30, Wave 35
- ▲ \$4.20, Wave 39



Value for money

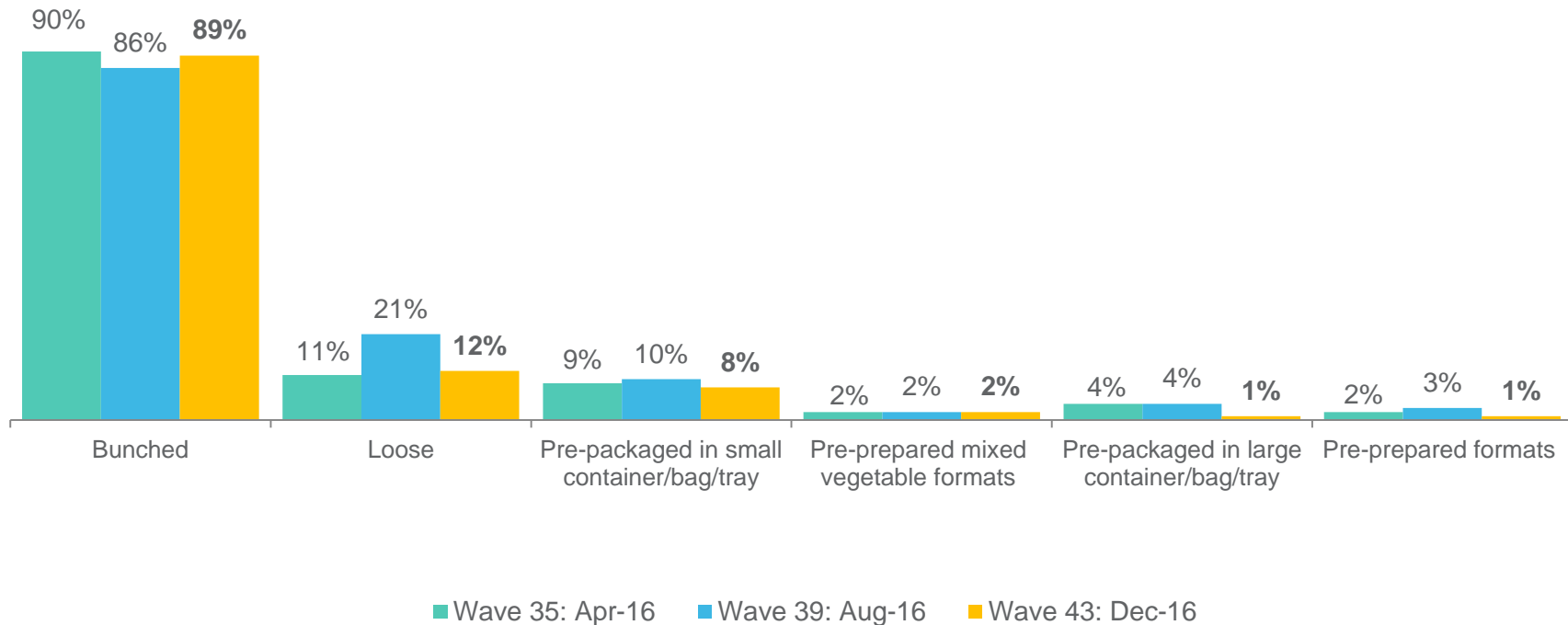
Consumers' perceived value for money is fair for radish (**6.1/10**), which has declined this wave.

- ▲ 6.3/10, Wave 35
- ▲ 6.4/10, Wave 39

Q3. How much Radish do you typically purchase when you shop for it?  
 Q3b. To the best of your memory how much did this cost on your most recent typically purchase?  
 Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)  
 Sample Wave 35 N=202, Wave 39 N=202, Wave 43 N=205



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

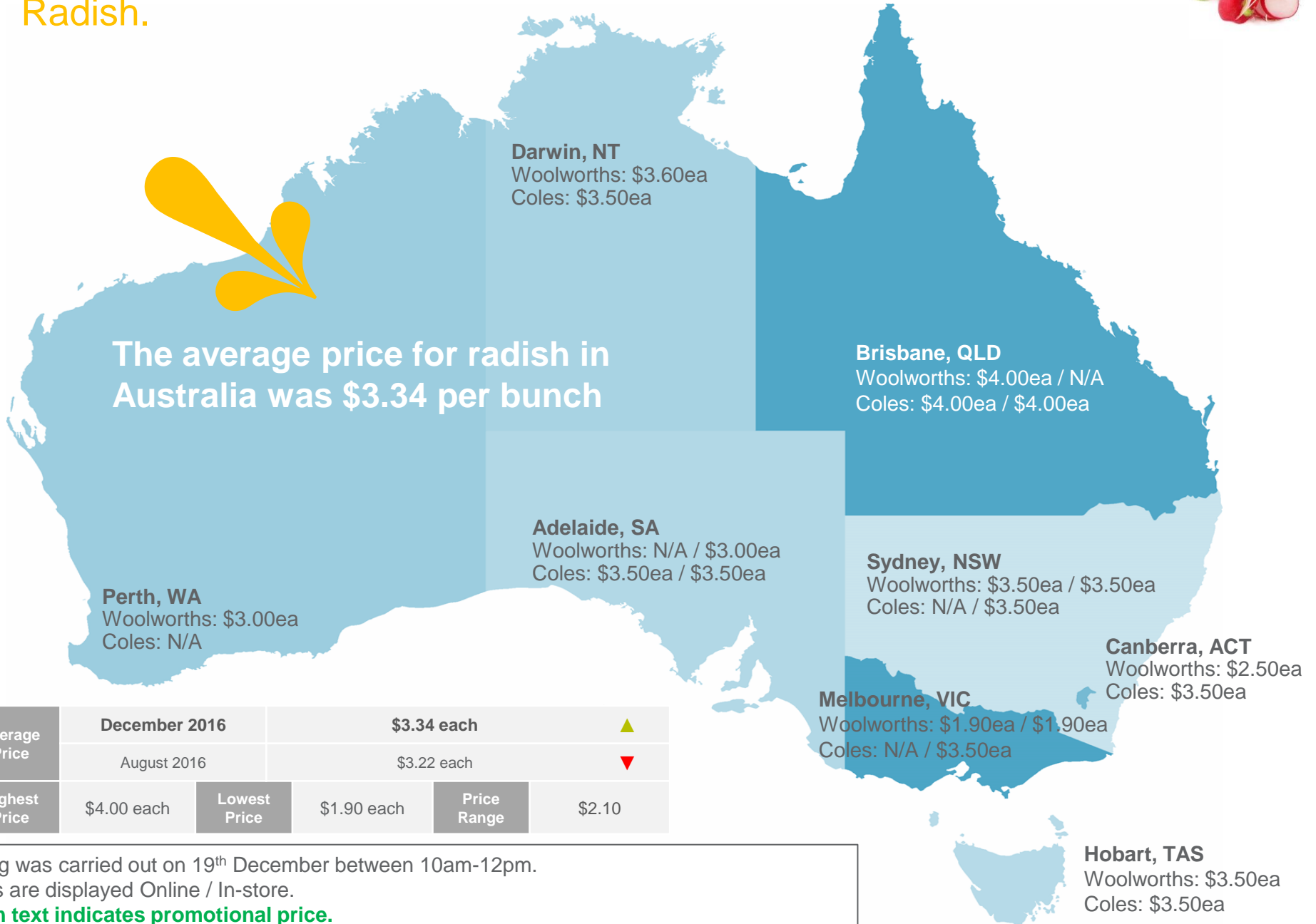


Q4b In what fresh formats do you typically purchase Radish?  
Sample Wave 35 N=202, Wave 39 N=202, Wave 43 N=205



# Online and In-store Commodity Prices.

## Radish.



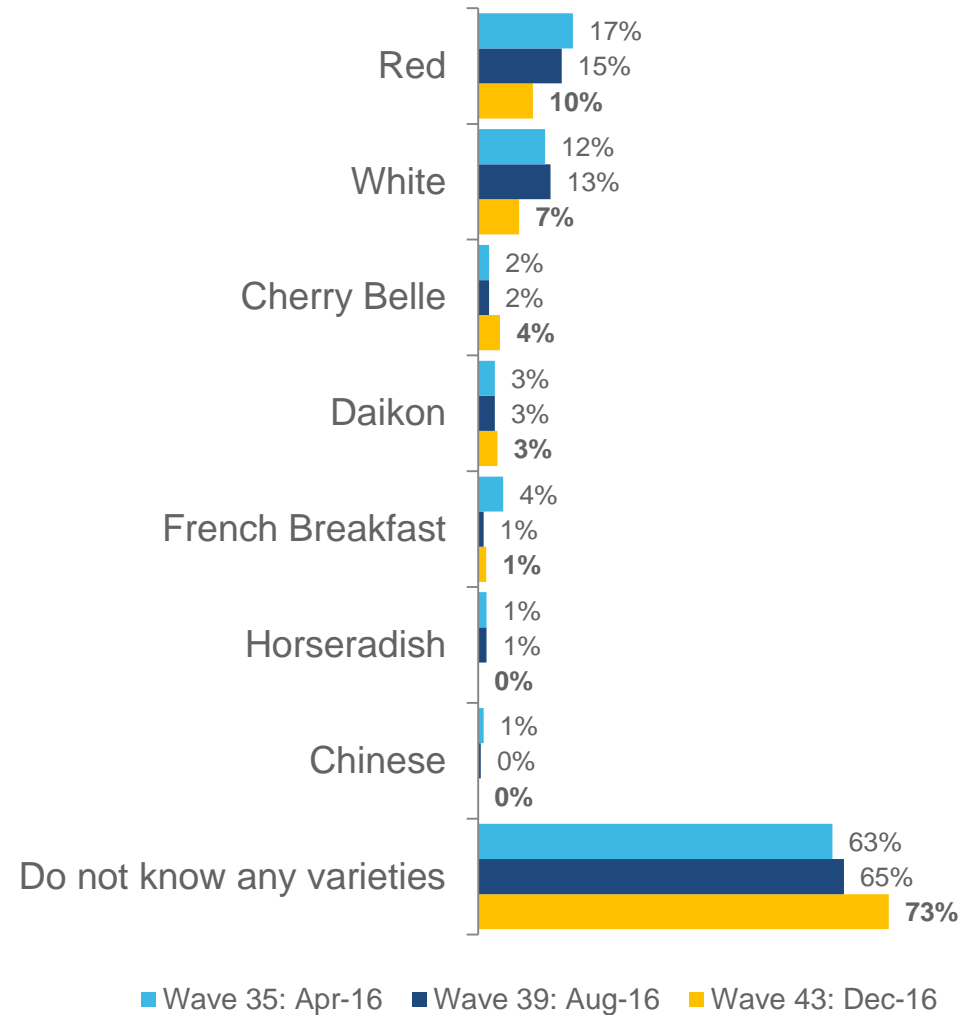
Average Price	December 2016	\$3.34 each		▲	
	August 2016	\$3.22 each		▼	
Highest Price	\$4.00 each	Lowest Price	\$1.90 each	Price Range	\$2.10

Pricing was carried out on 19<sup>th</sup> December between 10am-12pm.  
 Prices are displayed Online / In-store.  
**Green text indicates promotional price.**



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

Consumers are generally prompted by colour for radish varieties.

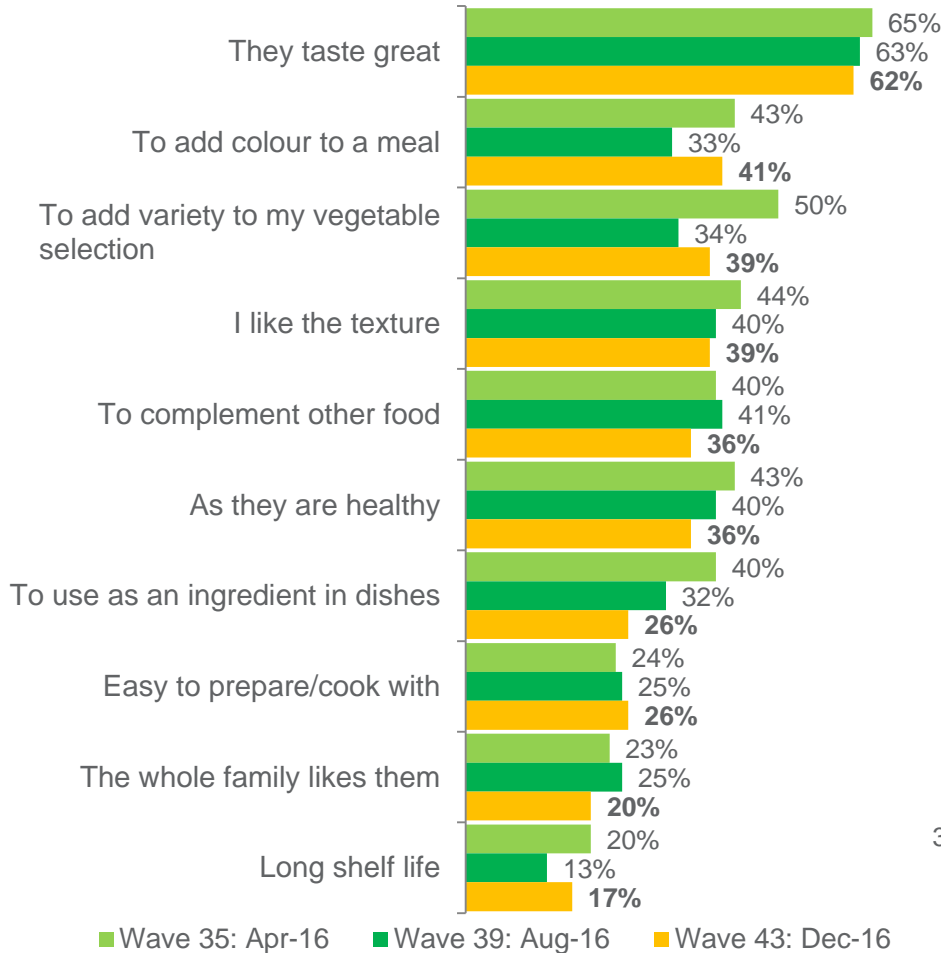


Q6a. What varieties of Radish are you aware of? (unprompted)  
Sample Wave 35 N=202, Wave 39 N=202, Wave 43 N=205

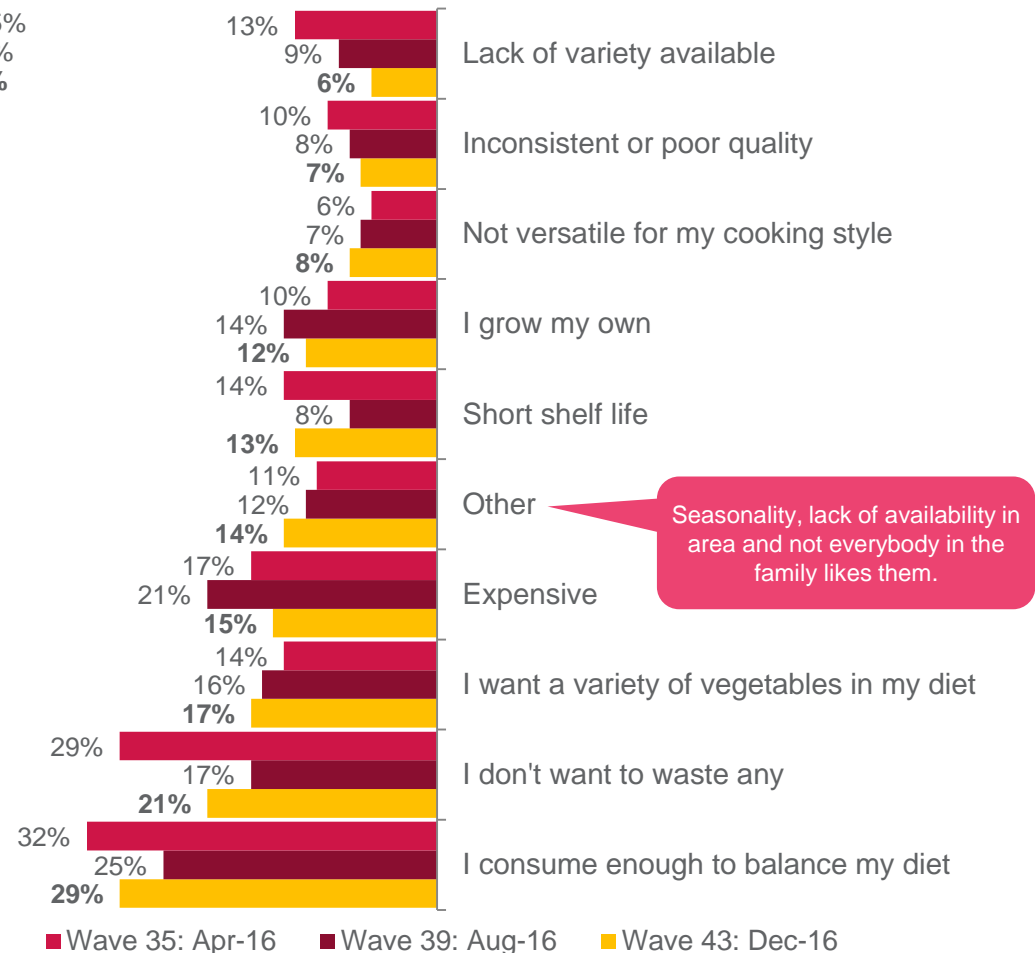


Taste, adding colour to a meal and adding variety are the key drivers of purchase. Barriers to purchase are already consuming enough and not wanting to waste any.

### Triggers



### Barriers



Q7. Which of the following reasons best describes why you purchase Radish?  
Q8. Which reason best describes why you don't buy Radish more often?  
Sample Wave 35 N=202, Wave 39 N=202, Wave 43 N=205





Australian cuisines and snacks are most popular for radish dishes.

Meal occasions tend to occur during dinner and lunch. There was a noticeable decline in consumers using radish when cooking a new recipe.

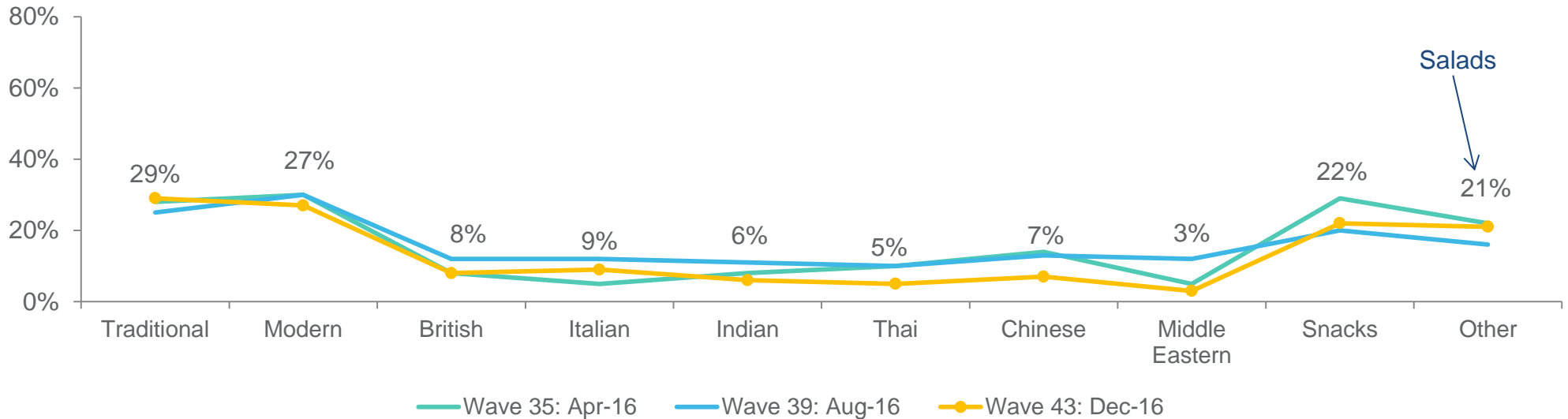
### Top 5 Consumption Occasions

	Wave 39	Wave 43
Dinner	41%	45%
Lunch	43%	40%
Family meals	34%	37%
Quick Meals	35%	27%
Snacks at home	24%	27%

**5%**  
used radish when cooking a new recipe

▲ 16%, Wave 39

### Typical Cuisine Cooked



Salads

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

Q10. What cuisines do you cook/consume that use Radish?  
 Q11. Which of the following occasions do you typically consume/use Radish?  
 Sample Wave 35 N=202, Wave 39 N=202, Wave 43 N=205

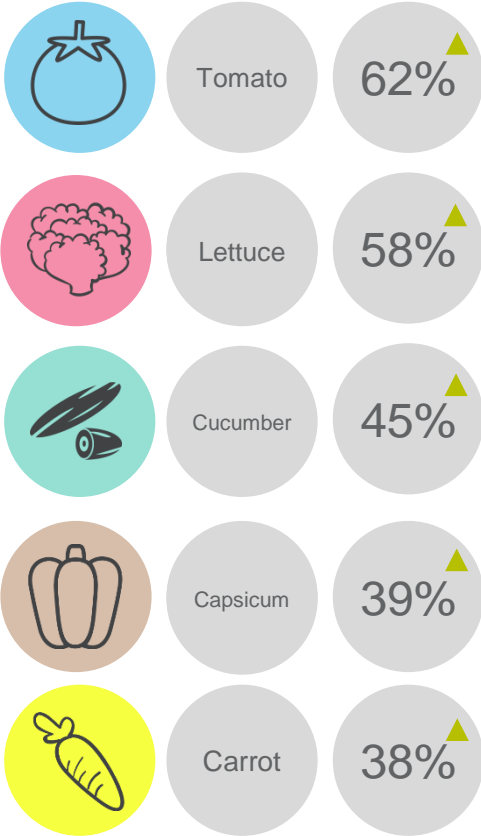


▼: Indicates LOWER score than current wave.  
 ▲: Indicates HIGHER score than current wave.



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

### Accompanying Vegetables



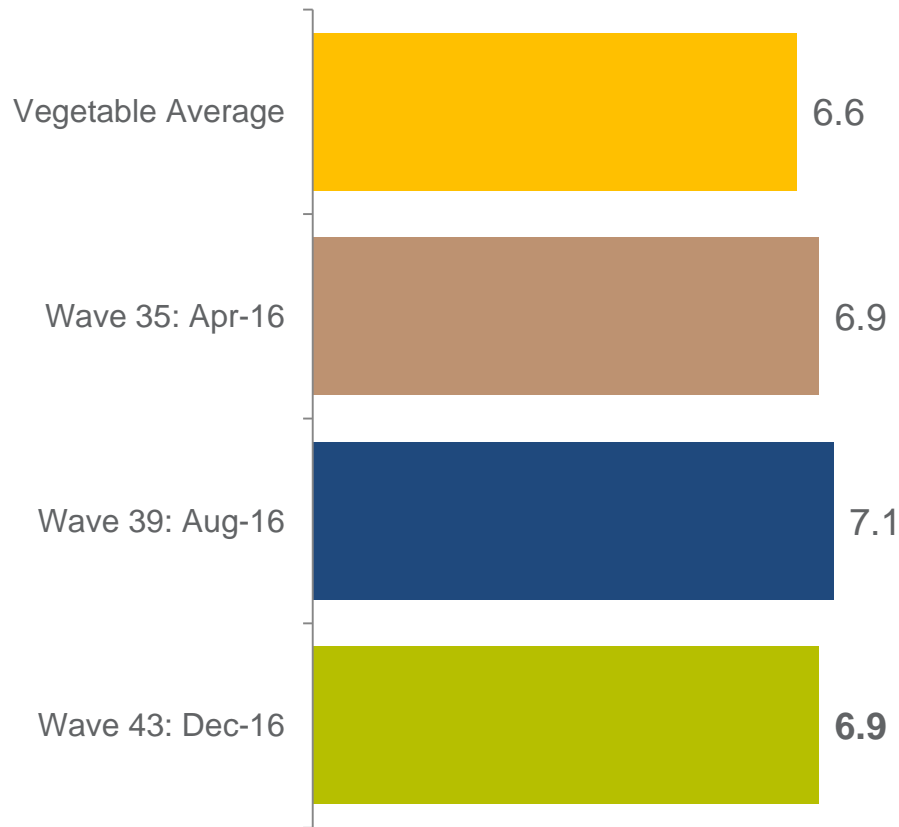
### Top Cooking Styles

	Wave 35	Wave 39	Wave 43
Raw	81%	78%	74%
Other	11%	5%	11%
Stir frying	20%	19%	10%
Boiling	3%	8%	7%
Soup	11%	12%	5%
Frying	5%	5%	4%
Steaming	3%	10%	4%
Slow Cooking	6%	8%	4%
Sautéing	6%	8%	4%
Microwave	2%	2%	3%

Q9. How do you typically cook Radish?  
Q10a. And when are you serving Radish which of the following do you also serve together with this?  
Sample Wave 35 N=202, Wave 39 N=202, Wave 43 N=205



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



Q14. When purchasing Radish, how important is Provenance to you?  
Q15. And when purchasing Radish, how important is that it is grown in Australia?  
Sample Wave 35 N=202, Wave 39 N=202, Wave 43 N=205

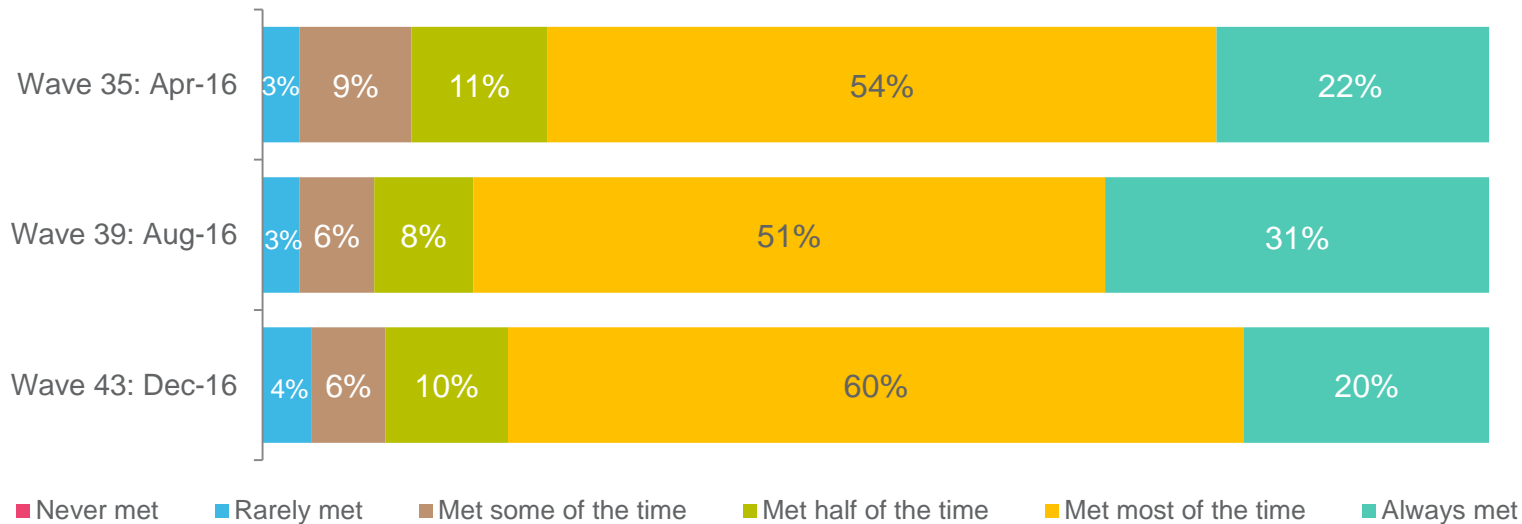


Consumers expect radishes to remain fresh for eight days once purchased. Expectations of freshness always being met has declined this wave.

Expected to stay fresh for 8.3 days

- ▲ 8.8 days, Wave 35
- ▲ 8.7 days, Wave 39

### Expectations Met



Q12. How long do you expect Radish to stay fresh for, once you have purchased it?  
 Q13. How often is this length of freshness met when you buy Radish?  
 Sample Wave 35 N=202, Wave 39 N=202, Wave 43 N=205

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

# Radish Product Launch Trends.

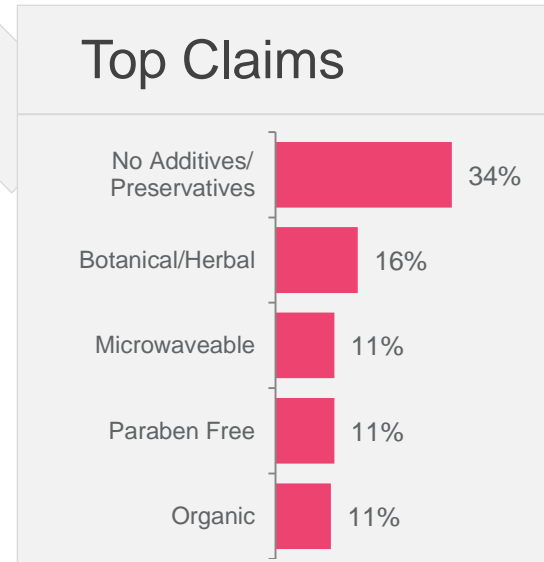
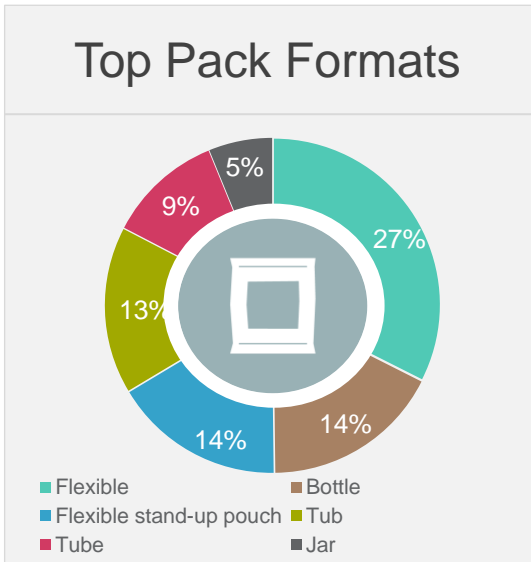
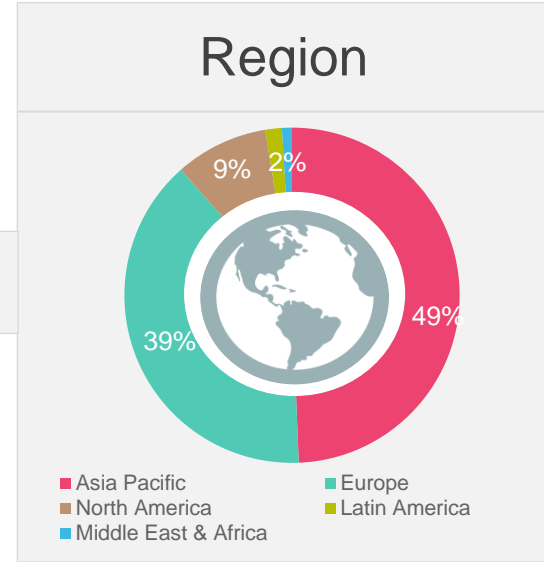
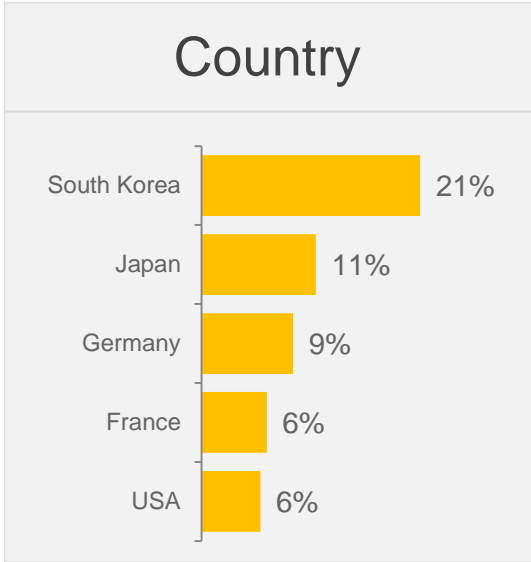
# Radish Global Launches

## September – December 2016

There were 312 radish products launched globally over the last three months. The majority of launches were in South Korea and Japan. Categories for launches were sugar & gum confectionery, and meals. Key packaging for radish products were flexible formats.



312 Global NPDs





## Radish Product Launches: Last 3 Months (September – December 2016) Summary

- There were 312 launches in the past 3 months globally that contained radish as an ingredient, which is lower than the previous wave (359 launches).
- There was four products launched in Australia over the past three months.
- Asia Pacific (49%) and Europe (39%) were the key regions for launches.
- Flexible packaging (27%), bottles (14%), and flexible stand-up pouches (14%) were the most common format used for products.
- The main categories for launches were sugar and gum confectionery (17%), meals (15%) and hair products (13%).
- Claims used on products were no additives/preservatives (34%), botanical/herbal (16%), and microwaveable (11%).
- The most innovative product launched was Frozen Radish Pie from Taiwan. Examples of other innovative launches can be found in the following pages.



Source: Mintel (2016)

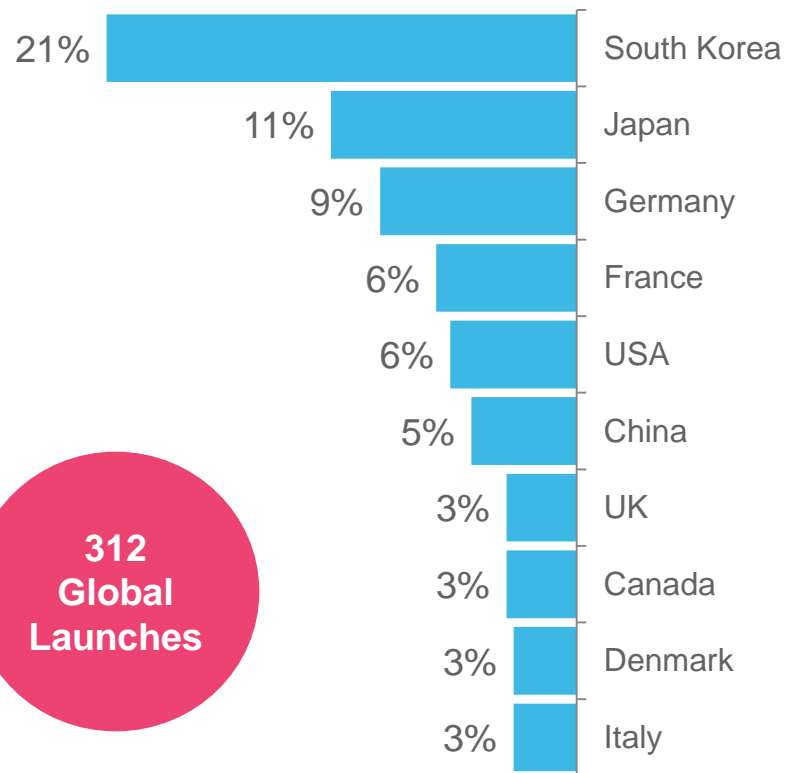




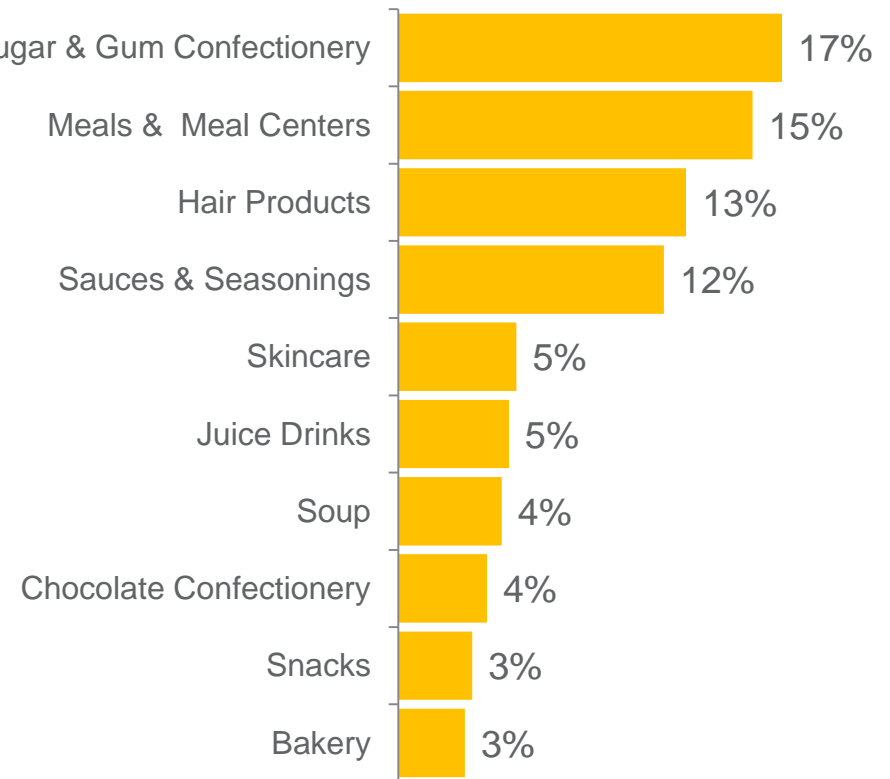
The majority of launches occurred in South Korea, Japan and Germany.

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

Top Launch Countries



Top Launch Categories












312  
Global  
Launches












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

### Pack Formats Used

Global		Flexible	27%
		Bottle	14%
		Flexible stand-up pouch	14%
Asia Pacific		Flexible	24%
		Flexible stand-up pouch	23%
		Tub	13%
Europe		Flexible	30%
		Bottle	17%
		Tub	16%

### Top Claims Used

Global		No Additives/Preservatives	34%
		Botanical/Herbal	16%
		Microwaveable	11%
Asia Pacific		No Additives/Preservatives	30%
		Microwaveable	22%
		Ease of Use	14%
Europe		No Additives/Preservatives	41%
		Botanical/Herbal	24%
		Ethical - Environmentally Friendly Product	22%

Only regions with n >30 are displayed

# »»»→ Innovative Radish Launches: L3M (September – December 2016)

## Xiang Xin Yuan Korean Flavoured Kimchi (China)

Xiang Xin Yuan Han Guo Wei Bai Cai Pao Cai (Korean Flavoured Kimchi) is a natural fermented food. This product retails in a 400g pack.



Claims:  
N/A

## Home Plus Single's Pride Smoked Duck with Vegetable Wrap (South Korea)

Home Plus Single's Pride Smoked Duck with Vegetable Wrap comprises sweet and sour sliced radish pickles and honey mustard sauce. This microwavable product is ready to eat in one and half to two minutes, and retails in a 332g pack.



Claims:  
Microwaveable

## Xiang Xin Yuan Radish Kimchi (China)

Xiang Xin Yuan Luo Bo Pao Cai (Radish Kimchi) is a traditional food of South Korea. The product retails in a 300g pack.



Claims:  
N/A

## Otogi Hot Stone Pot Bibimbap (South Korea)

Otogi Hot Stone Pot Bibimbap is cooked in a iron pot and quickly frozen. It is said to offer freshly cooked healthy meal with a delicious seasoning sauce. This ready to eat product can be microwaved or pan-fried in three and half minutes and three minutes respectively. It retails in a 450g pack containing 2 × 225g units.



Claims:  
Microwaveable, Ease of Use

# »»» Innovative Radish Launches: L3M (September – December 2016)

## Coop Klar Til At Spise Pasta Salad with Sweet Chili and Prawns (Denmark)

Coop Klar Til At Spise Måltidssalat med Kæmpe Rejer med Pasta og Sød Chili (Pasta Salad with Sweet Chili and Prawns) is described as satiated, easy and delicious. It comprises 385g of mixed salad with prawns, 60g of dressing, and 5g of sesame seeds. The product is ready-to-eat, is recommended for on-the-go, and it retails in a 450g pack bearing a Farmed Responsibly ASC Certified logo.



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

## Hav'eat Dried Radish Green & Pearl Barley Rice (South Korea)

Hav'eat Dried Radish Green & Pearl Barley Rice is made with rice, barley, and dried radish leaves. It contains 245 calories and can be prepared in three minutes and 30 seconds. This microwaveable product retails in a 150g pack.



**Claims:**  
Microwaveable

## Chaegami Organic Cubed Radish Kimchi (South Korea)

Chaegami Organic Cubed Radish Kimchi is made of 100% organic ingredients to provide a natural flavour. This product retails in a 500g pack bearing the HACCP logo.



**Claims:**  
Organic

## Yorihada Lotte Hotel Young Radish Kimchi (South Korea)

Yorihada Lotte Hotel Young Radish Kimchi is made with 85% Korean crisp young radish, seasoned with spices and blended at a golden ratio. It is said to be of a premium quality and made via a traditional method by Kimchi master, Kim Sunja. This product has a neat and refreshing flavour, and retails in a 1kg pack featuring the HACCP logo.



**Claims:**  
Premium

# ➤➤➤ Innovative Radish Launches: L3M (September – December 2016)

## Topvalu Kombu Broth Flavour Oden (Japan)

Topvalu Kombu Broth Flavour Oden is now available. It features domestic daikon radish, deep-fried tofu, an egg, konjak, deep-fried burdock and fishcake, all in kombu broth made with kombu from Rishiri, bonito flakes from Makurazaki, dried sardines and soy sauce. The product has been made with the chilled method and simmered at around 98°C for approximately 60 minutes to enhance umami when stored in the fridge.



**Claims:**  
Economy

## Biotta Breuss Vegetable Drink (Czech Republic)

Biotta Breuss (Breuss Vegetable Drink) is described as a balanced mix of the most important vital ingredients and trace elements, perfect for fasting time. This organic vegan product is made according to the original Rudolf Breuss recipe and retails in a 500ml bottle, featuring the EU Green Leaf logo.



**Claims:**  
Organic, Vegan, No Animal Ingredients

## Ponto Frozen Radish Pie (Taiwan)

Ponto Frozen Radish Pie is now available. The vegetarian product is made with selected wheat flour and is said to provide a pleasant aroma. It is halal certified and retails in a 480g pack, containing four units.



**Claims:**  
Vegetarian, Halal

## Hardbite Ketchup Flavored Handcrafted Potato Chips (Canada)

Hardbite Ketchup Flavored Handcrafted Potato Chips contain nothing artificial, no trans fat, gluten, GMO or cholesterol. They are made with limited ingredients and the best potatoes cooked in small batch sizes to ensure the highest quality and flavour. The product retails in a 150g pack featuring the Twitter and Facebook logo.



**Claims:**  
All Natural Product, Low/No/Reduced Cholesterol, Gluten-Free, Low/No/Reduced Transfat, Low/No/Reduced Allergen, GMO-Free, Social Media



In the Media.





# General Vegetable News

## (September – December 2016)

- The vegetable industry has teamed up with scientists and educational researchers to combat concerns about Australian kids' diets and teach them that eating vegetables is as easy as ABC – as long as ABC stands for artichokes, broccoli and carrots.
- With Australian children's consumption of vegetables sitting far below the daily recommended servings from the Australian Dietary Guidelines, Horticulture Innovation Australia has commissioned CSIRO to create a vegetable education resource for use in schools that aligns with the Australian curriculum and aims to increase children's willingness to eat vegetables.
- "The vegetable education resource developed by CSIRO has been tailor-made for Australian schools and road-tested in classrooms. This will ensure that it can make a meaningful difference to kids' willingness to eat their veggies by increasing their knowledge and experience of how to use vegetables in meals," said Hort Innovation CEO John Lloyd.
- "The CSIRO education kit contains a range of different activities and educational techniques to connect with children at each stage of their learning, and ultimately lets kids put that learning into practice by providing them with fresh veggies and letting them create their own sandwiches, salads and juices using the experience that they've gained."
- "The industry is really looking forward to further development of the vegetable education resource that will make it even more effective and convenient for teachers and schools to adopt into their teaching plans."



Source: <http://ausveg.com.au>





# Commodity News

## (September – December 2016)



- New research suggests that we should eat our microgreens, after finding that the red cabbage variety of the tiny vegetable may reduce the risk of cardiovascular disease.
- Microgreens are seedlings of edible plants and herbs that can be grown indoors and harvested in just 1-2 weeks, when they are still immature.
- The researchers found that supplementation with either red cabbage microgreens or mature red cabbage reduced weight gain induced by a high-fat diet, and the vegetables also lowered LDL cholesterol levels in the liver. Based on their results, the researchers conclude that red cabbage microgreens may be more beneficial for heart health than mature red cabbage.

<http://www.medicalnewstoday.com>



There was no celery specific news to report this wave.



- Staay-Hispa has created a new, eye-catching packaging: a cucumber in a cardboard box. It is a preview of the packaging possibilities of the sustainable Eat&Care line, which was launched by the company earlier this year.
- The Eat&Care brand already consists of limes, pineapples and salatrio. "These are sustainably cultivated products, and a sustainable packaging is part of that: biodegradable cardboard," says Esli Hooijmeijer, marketing manager of Staay-Hispa. The eye-catching cucumber packaging is a new version of this. "We want to further expand the Eat&Care line, and show customers the possibilities of these sustainable packagings."

<http://www.freshplaza.com>



- With an eye on sustainability, as well as potentially offering consumers price breaks on aesthetically "imperfect" produce, SunFed is launching its Almost Famous program in stores nationwide in the United States.
- "This is stuff that doesn't make the cut under the current retail specs, but it's still extremely good, so this should be sold at a lower price than a regular bell pepper or regular eggplant."
- SunFed offers items ranging from eggplant, green bell peppers and colored bell peppers to zucchini, cucumbers and yellow squash, depending on the time of year and product availability.
- Almost Famous vegetables are packed in bags. With the value proposition of a grab-and-go item, this program addresses the challenge for retailers of selling the items in bulk.

<http://www.thepacker.com>



# Commodity News

## (September – December 2016)



- Eggplant is entering the spotlight and becoming the new glossy, up-and-coming superfood. In Australia, eggplant production has rapidly grown by 12.2 per cent (from 2008-2014) according to AusVeg, with exportation increasing by 300 per cent.
- Supermarkets have also seen an increase in popularity too. "At Woolworths the sale volume of eggplants has increased considerably over the last 12 months," says Mario Saad, Woolworths category manager of produce. "With growth up 14 per cent on last year, it could very well be the 'new avocado,' especially now shoppers are beginning to realise it's a superfood and are cooking with it more.
- Saad also says its history as a 'poor man's meat' is a leading factor adding to lifestyle trends too. "The popularity of reduced meat diets has definitely contributed to eggplants resurgence".

<http://www.goodfood.com.au>



There was no spring onion specific news to report this wave.



- Karen Caplan, President and CEO of Frieda's Specialty Produce in the United States, predicts that radishes will be at the forefront of fresh food trends in 2017.
- Frieda's predicts that specialty radishes—popular with chefs for the last few years—will take hold with shoppers. A variety of radish varieties were recently featured on Bravo's "Top Chef Charleston", a US TV cooking show—from daikon to French breakfast to watermelon radishes.
- "Retailers are embracing this change by expanding the number of vibrantly coloured vegetables and providing more produce variety for shoppers." "Radishes are an attractive item to feature and may wind up being the kale of 2017.

<http://www.andnowuknow.com>



# Background & Methodology.





# ➤ Background & Setting the Scene.

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

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

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

This wave's report (Wave 43, December 2016) focuses on:

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

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





# Online Methodology.

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

## General Respondent Questions

Demographics

Vegetable Consumption

1/7 Commodities

## Commodity Specific Questions

Category Health

Purchase & Consumption Habits

Price Perceptions & Average Spend

Triggers/Barriers to Purchase

Preparation Preferences

+ 2 Ad hoc Questions per Month





# Sample.

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

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

To qualify for the questionnaire, respondents...

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

	Cabbage n=303	Celery n=311	Cucumber n=310	Zucchini n=306	Eggplant n=202	Spring Onion n=202	Radish n=205
<b>Gender</b>							
Male	46%	44%	39%	39%	42%	43%	45%
Female	54%	56%	61%	61%	58%	57%	55%
<b>Age</b>							
18-24 y.o.	3%	5%	5%	4%	3%	3%	2%
25-34 y.o.	12%	13%	14%	13%	19%	9%	13%
35-44 y.o.	17%	17%	17%	14%	14%	8%	12%
45-54 y.o.	17%	14%	16%	20%	17%	17%	13%
55-64 y.o.	21%	22%	22%	24%	25%	25%	24%
65+ y.o.	29%	28%	27%	24%	21%	38%	35%
<b>Household</b>							
Single Income no Kids	18%	22%	21%	20%	22%	19%	17%
Double Income no Kids	17%	14%	16%	16%	20%	14%	21%
Young Families	13%	14%	15%	13%	9%	7%	11%
Established Families	22%	20%	22%	25%	24%	17%	18%
Empty Nesters	30%	30%	25%	25%	24%	43%	33%
<b>Location</b>							
New South Wales	16%	21%	18%	24%	19%	17%	22%
Victoria	17%	21%	22%	19%	21%	19%	19%
South Australia	21%	15%	17%	16%	17%	16%	16%
Queensland	19%	20%	16%	15%	14%	19%	17%
Western Australia	17%	15%	18%	16%	20%	15%	16%
Tasmania	8%	5%	4%	6%	4%	10%	8%
Australian Capital Territory	2%	3%	5%	5%	3%	3%	3%
Northern Territory	1%	0%	0%	0%	1%	0%	0%





# Trends Research: Our Approach



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

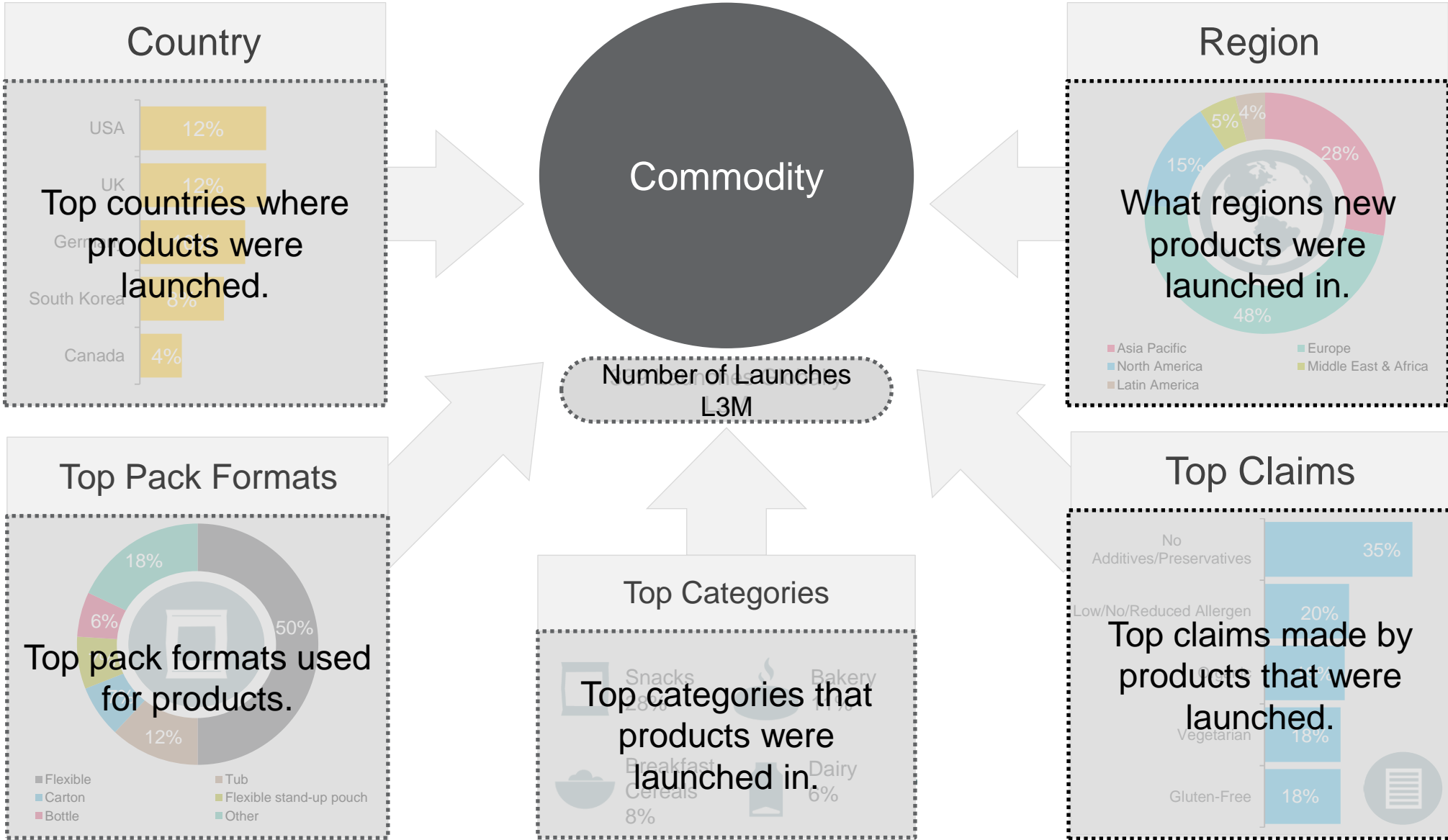




# Product Launches Last 3 Months (L3M)

## How to Read Summaries

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





# Thanks.

