



Project Harvest Monthly Tracker Report.

Wave 44, January 2017

Vegetables tracked: Asian Vegetables,
Capsicum, Brussels Sprouts, Spinach,
Parsnips, Beetroot, Sweetpotatoes

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

**Horticulture
Innovation**
Australia



colmar brunton.



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Wave 44: Executive Summary

Industry Insight.

The Movers and Shakers – 2013 to 2016

Horticulture is a vital part of Australia's economy and its produce is at the root of Australian consumers' health and longevity. Although the industry can be challenged by natural disasters, food scares and imported produce it does continue to be presented with opportunities both domestically and globally. The key to taking advantage of these many opportunities will be the industry's ability to understand the needs and desires of consumers and to develop products and solutions to satisfy them.

The tricky part is that nothing stands still - consumers change like the seasons and all parts of the industry must keep their finger on the pulse of demand in order to succeed.

Project Harvest has tracked evolving consumer attitudes and perceptions for three and a half years. During this time, there have been changes both large and small. Focusing on consumer perceptions of individual commodities, here is a list of the top "movers and shakers" from 2013 to 2016...

Industry Insight cont.

Top 5 Increased in Importance

Celery
Carrot
Beetroot
Sweet Corn
Beans

Top 5 Increased in Satisfaction

Chillies
Pumpkin
Spring Onion
Cauliflower
Cabbage

Top 5 Increased in Likelihood to Recommend

Cauliflower
Beetroot
Brussels Sprouts
Sweet Corn
Zucchini

Top 5 Increased in New Varieties

Brussels Sprouts
Beetroot
Sweet Corn
Eggplant
Cauliflower

Top 5 Increased in Future Purchase Intent

Sweet Corn
Brussels Sprouts
Cabbage
Silverbeet
Green Peas

Industry Insight cont.

So a very positive time for commodities such as Sweet Corn, Brussels Sprouts, Beetroot and Cauliflower, with their specific health benefits, versatility, cuisine trends and the popularity of particular diets contributing strongly. Promising signs for vegetables overall too, with a 2-3% increase in each of these measures across the board.

So, what will be the “movers and shakers” over the next three years? That is difficult to predict. But what we *can* predict is the consumer sentiment that will ultimately drive behaviour:

- Less: Less clutter, less energy, less waste
- The desire for longevity of produce, freshness and shelf-life
- Personalised/customised portions and combinations
- Alternate uses for the typically discarded parts of a commodity
- Alternate retail channels

All these factors are important to keep in mind - regardless of your position in the supply chain.

Wave 44 Fast Facts – Asian Vegetables

- ▶ Asian vegetables have positive consumer sentiment and propensity to purchase, consistent with previous waves.
- ▶ Asian vegetables are purchased 5 times per month and are consumed around 8 times per month, relatively consistent with the previous wave.
- ▶ Consumers purchase 0.8kg of Asian vegetables per shop. Recalled last spend is \$5.20. Overall, consumers perceive Asian vegetables to be good value for money (6.8/10).
- ▶ National price tracking indicated the average price for Buk Choy in January 2017 was \$2.22 each.
- ▶ Just under one quarter of consumers are unable to recall a type of Asian vegetable. Buk Choy remained the most recalled type of Asian vegetable, followed by Choy Sum and Pak Choy.
- ▶ Asian vegetables are expected to stay fresh for just under a week, and freshness expectations are met most of the time. Asian vegetables appear to be largely unaffected by seasonal changes.
- ▶ Health and taste are the main influences on purchase of Asian vegetables. Not wanting to waste any and already consuming enough are the primary barriers to purchase.

6.1
days

the amount of time Asian vegetables are expected to stay fresh for.

1.

Insight:

Expense is increasing as a barrier to purchase. Furthermore, the average weight of purchase for Asian vegetables is declining.

Long Term Recommendation:

Investigate opportunities to add value when purchasing Asian vegetables such as pairing with accompanying sauce packs (i.e. ginger & soy, oyster sauce) or pre-chopped and washed formats for stir fries. This will provide consumers with greater convenience and recipe knowledge.

2.

Insight:

Ease of preparation and cooks quickly are both trending downwards as triggers to purchase.

Long Term Recommendation:

Look towards New Product Development (NPD) that reduce the amount of preparation required i.e. wok packs. Explore growing and supplying baby formats that will reduce cooking times for consumers.



Wave 44 Fast Facts – Capsicum

- ▶ Consistent with previous waves, capsicums have strong category health figures for importance, satisfaction, endorsement and interest in new varieties.
- ▶ Both purchase and consumption frequency of capsicum increased this wave. Capsicum is consumed on average 10 times per month and is purchased mainly from mainstream and specialist retailers.
- ▶ Consumers are purchasing 700g of capsicums on average. Recalled last spend is \$4.40, which is perceived to be fair value for money (6.0/10).
- ▶ Price tracking for January 2017 showed the national average as \$6.69 per kg for green capsicums.
- ▶ Approximately one half of consumers were unable to recall a type of capsicum. Colour was the main trigger to recall.
- ▶ Taste and adding colour to a meal were the key influences to purchase. Barriers to purchase included price and already consuming enough.
- ▶ Consumers expect capsicums to remain fresh for 98 days once purchased. These expectations are generally being met at least most of the time.

6.0/10

Consumers perceive capsicum to be fair value for money.

1.

Insight:

Capsicum has increased in both purchase and consumption frequencies this wave.

Short Term Recommendation:

Continue increases in purchase and consumption by maintaining engagement through the cooler months. This includes providing winter appropriate recipes. Consistent availability and quality throughout the cooler months will also maintain high levels of satisfaction.

2.

Insight:

Consumers have high interest in new varieties of capsicum.

Long Term Recommendation:

Explore new varieties or packaging formats of capsicum i.e. multi-coloured pre-cut formats. This will help to continue uplift within this commodity. Look for new variety trends in overseas markets, such as bullhorn, which are widely used in the USA, but lesser known here.



Wave 44 Fast Facts – Brussels Sprouts

- ▶ Brussels sprouts had relatively strong category health figures, with consumers having relatively strong future purchase intent.
- ▶ Brussels sprouts were purchased around four times per month and were consumed seven times per month. Purchase is predominantly through mainstream and specialist retailers.
- ▶ Overall, Brussels sprouts were perceived to be relatively good value for money. Consumers on average purchase 0.7kg of Brussels sprouts, typically in the format of individual sprouts. Recalled last spend was \$4.20.
- ▶ Price tracking for January 2017 revealed the average price was \$12.18 per kg, continuing to rise from \$10.22 per kg recorded in September 2016.
- ▶ Over three quarters of consumers could not recall any types of Brussels sprouts. Low awareness was consistent with previous waves.
- ▶ Brussels sprouts are expected to stay fresh for nearly 9 days, which is being met at least most of the time.
- ▶ Top triggers for purchase were health and taste. Key barriers to purchase included wanting a variety in their diet and price.

26%

of consumers purchase Brussels sprouts from the market.

1.

Insight:

Consumers hold high levels of satisfaction with Brussels sprouts, exemplified through increased spend and average weight of purchase.

Short Term Recommendation:

With Brussels sprouts gaining increased media attention, continue to highlight the versatility of the vegetable as well as provide recipes at point of sale to encourage purchase.

2.

Insight:

Individual Brussels sprouts are the most popular format purchased, with a significant decline in purchase of pre-packaged trays this wave.

Long Term Recommendation:

With mainstream retailers typically only providing one format, choice is currently restricted and not suitable for all consumers. Look to supply both loose options as well as pre-packaged trays.



Wave 44 Fast Facts – Spinach

- ▶ Spinach has strong category health figures for importance, satisfaction, endorsement, interest in new varieties and high future purchase intent.
- ▶ Purchase of spinach occurred around 5 times per month and was consumed on average 10 times per month.
- ▶ Overall, spinach was perceived to be good value for money, with recalled last spend at \$4.00.
- ▶ Consumers on average purchase 0.5kg of spinach, typically in a loose format or pre-packaged format.
- ▶ Price tracking for January 2017 revealed that the average price of Baby Spinach was \$17.45 per kg, consistent with the previous wave.
- ▶ Nearly half of consumers could not recall a type of spinach. Baby and English were the most recalled types.
- ▶ Spinach is expected to stay fresh for 6 days. Freshness expectations have marginally declined over the last three waves.
- ▶ Top triggers for purchase are based around health, ease of preparation, and taste. In contrast, the key barriers included short shelf life and not wanting to waste any.



of consumers use spinach when cooking a new recipe.



Insight:

Consumers are experimenting with spinach when cooking new recipes.

Short Term Recommendation:

Look to provide consumers with further recipe ideas moving into the cooler months, as purchase and consumption typically decline during this period.



Insight:

With the change in purchase formats across mainstream retailers (moving away from loose formats), consumer acceptance of this change is still unknown.

Long Term Recommendation:

It is important to continue monitoring purchase behaviour of spinach as the change in formats may have wider implications on the category over time such as perceptions of freshness and quality.





Wave 44 Fast Facts – Parsnip

- ▶ Parsnips hold lower levels of importance, satisfaction and endorsement than other vegetables, with future purchase intent in line with the Vegetable Average.
- ▶ Parsnips are purchased on average three times per month and consumed around five occasions per month. Purchase is primarily from mainstream retailers.
- ▶ On average consumers are purchasing 800g of parsnips per shop. Recalled last spend was \$4.20, with value for money perceived as fair.
- ▶ Price tracking revealed an average price of \$10.05 per kg of parsnips, relatively consistent with the previous wave (\$10.20 per kg).
- ▶ There are low levels of awareness of parsnip types, with 80% of consumers unable to recall a type.
- ▶ The main motivations for purchasing include taste and adding variety. Price and already consuming enough are the key barriers to purchase.
- ▶ Parsnips are expected to stay fresh for approximately nine days. Freshness expectations are not being met as often as the previous two waves.

32%

of consumers don't buy Parsnips more often due to its price concerns.

1.

Insight:

Tradition and habit are increasing as triggers to purchase, whilst being used as an ingredient is declining.

Short Term Recommendation:

Approximately four in five consumers (82%) who purchase parsnips are aged 45 years and above. Greater focus needs to be placed on encouraging Millennials into the category. Further research is required to understand barriers for these consumers.

2.

Insight:

There is low satisfaction with parsnips, and perceptions of expense are increasing, although there has been little variation in price across waves.

Long Term Recommendation:

Cooking quickly and versatility hold low importance in driving purchase at this point in time. Highlighting these attributes may prompt greater trial and relevance amongst younger consumers.





Wave 44 Fast Facts – Beetroot

- ▶ Beetroot has strong levels of endorsement, indicating consumers are happy to recommend to family and friends. Future propensity to purchase is high.
- ▶ Beetroot is purchased approximately 3 times per month. Consumption of beetroot occurs 9 times per month.
- ▶ On average, consumers purchase 0.8kg of beetroot. Recalled last spend was \$4.30. Overall, consumers perceive good value for money (6.4/10).
- ▶ Price tracking revealed an average price of \$5.05 per kg for beetroot, this was relatively consistent with prices recorded in September 2016 (\$4.82 per kg).
- ▶ Awareness of beetroot types is very low, with 68% of consumers unable to recall a type.
- ▶ Beetroot is expected to remain fresh for 10 days. Freshness expectations are generally being met at least most of the time.
- ▶ Taste and health remain the key triggers to purchase. The main barriers to future purchase are already consuming enough and not wanting to waste any.

35%

of consumers eat beetroot raw.

1.

Insight:

Eating beetroot raw has increased over the last three waves.

Short Term Recommendation:

Promote the health benefits of eating beetroot raw as it retains greater nutrients. Educate consumers on these benefits both instore and on-pack.

2.

Insight:

Whilst beetroot holds low importance, it has strong endorsement, interest and future purchase intent.

Long Term Recommendation:

Look to make beetroot more relevant and important to consumers through highlighting specific health benefits for Conscious Improvers, as well as providing flavour descriptors for Eager Explorers.





Wave 44 Fast Facts –Sweetpotatoes

- ▶ Sweetpotato has strong endorsement, satisfaction and interest, with high future purchase intent, consistent with previous waves.
- ▶ Purchase of sweetpotato occurs 4 times per month and is consumed around 8 times per month. Purchase is typically from mainstream retailers.
- ▶ Overall, sweetpotato is perceived to be good value for money (6.5/10). On average, consumers purchase 1.2kg of sweetpotato, typically loose. Recalled last spend is \$4.00.
- ▶ Price tracking for January 2017 revealed an average price of \$4.77 per kg, higher than prices in September 2016 (\$3.74 per kg).
- ▶ Two thirds of consumers were unable to recall a variety of sweetpotato. Those who did more often recalled the colour rather than a specific variety, with Orange / Gold / Yellow being the most recalled colour.
- ▶ Taste, health and ease of preparation are the strongest triggers to purchase, while already consuming enough for their needs and wanting a variety the two biggest barriers.
- ▶ Consumers expect sweetpotato to remain fresh for approximately two weeks, which is being met at least most of the time.

60%

of consumers purchase sweetpotatoes because they are easy to prepare.

1.

Insight:

Sweetpotatoes hold high levels of endorsement with strong future purchase intent.

Short Term Recommendation:

Encourage consumers to increase their weight of purchase, create more convenient meal occasions such as breakfast sweet potato cakes, baked sweetpotatoes for lunch and chips for snacks. Recipes at point of sale will help to keep the vegetable at top of mind.

2.

Insight:

There is high interest in new varieties of sweetpotatoes.

Long Term Recommendation:

Look at distribution and availability of alternative sweetpotatoes varieties such as white and purple. Provide information at point of sale that differentiates between varieties and a unique selling proposition i.e. 'most nutrient dense', 'sweetest'.



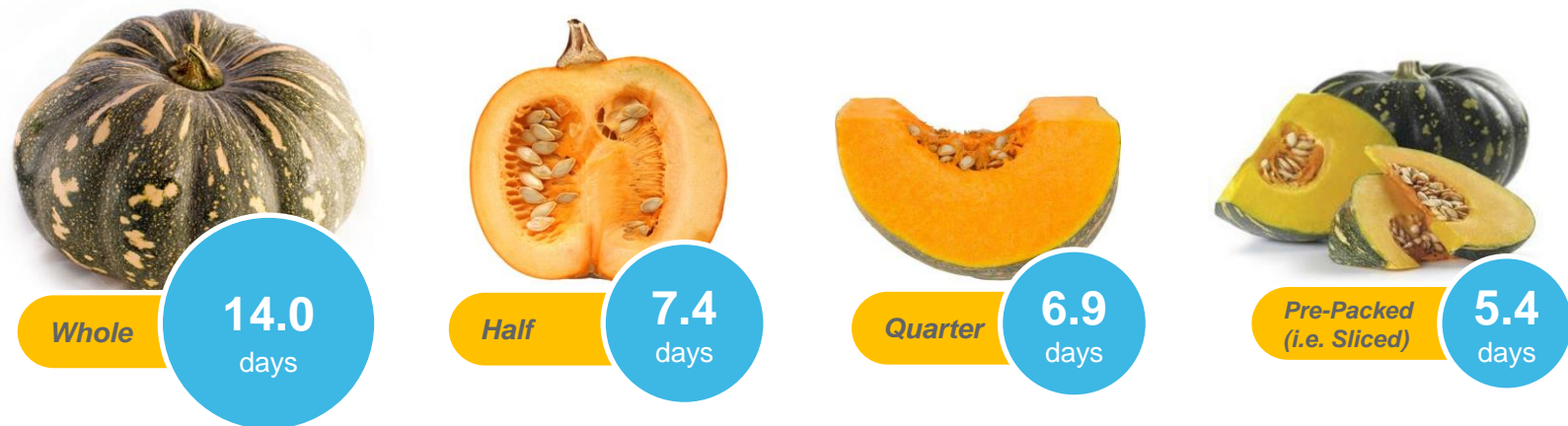


Wave 44:
Response to Ad hoc
Questions



Overall, whole vegetables are perceived to remain fresher for 50-100% longer when compared to pre-cut or pre-packaged vegetables.

Whole pumpkins are expected to last twice as long as cut or pre-packed formats.





Whole lettuce is expected to stay fresh for approximately one week, whereas pre-packaged formats are expected to stay fresh for four to five days.



Whole carrots are perceived to stay fresh for three days longer than pre-packed carrots, and double the length of pre-prepared formats (i.e. sticks).





Whole celery is expected to stay fresh for over a week, whereas pre-packed and pre-prepared formats are expected to stay fresh for approximately five days.



Whole sweet corn is expected to last approximately two days longer than cut sweetcorn (i.e. Cobbettes).





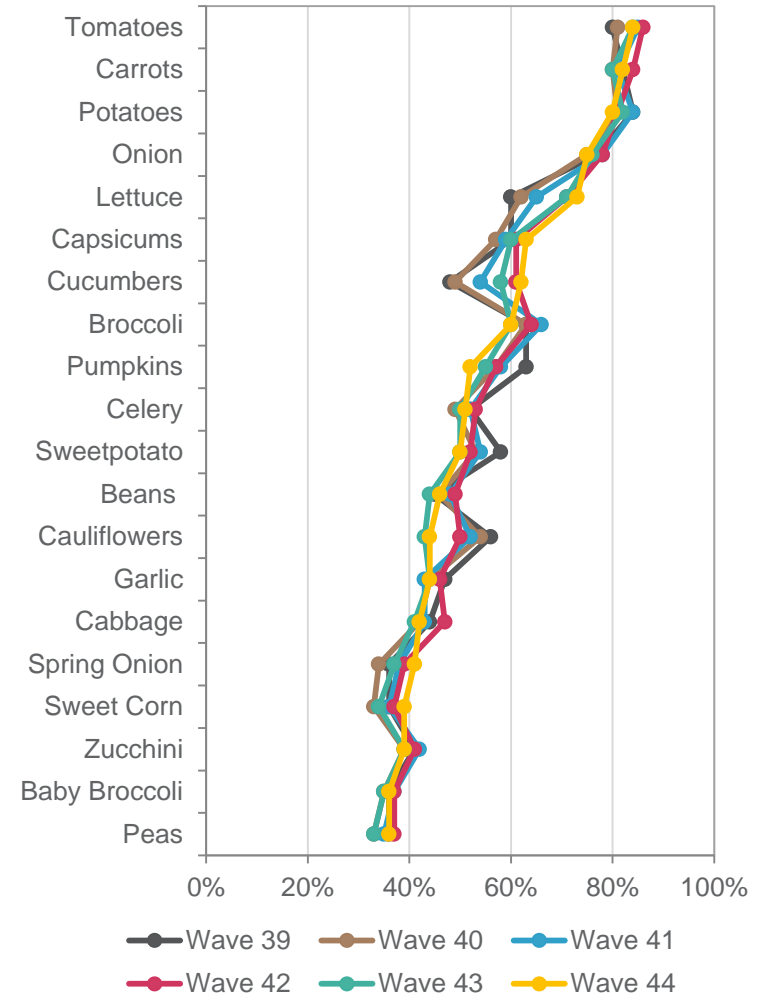
Wave 44: Overall Vegetable Tracking



Top 20 Vegetables Purchased Last Month

Tomatoes, carrots and potatoes continue to be the staple vegetables, purchased regularly every month.

Vegetable purchase in January 2017 is relatively consistent with past months. This wave sees the biggest increases in purchase from sweet corn, spring onion and cucumbers.



Sample Wave 44 N=2243 (base in higher as Q appears in Screener)
S8. Which of the following fresh vegetables have you purchased in the last month?



Category Health Explained.

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

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

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





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

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

	Asian Vegetables	Capsicum	Brussels Sprouts	Spinach	Parsnip	Beetroot	Sweet-potatoes	Vegetable Average
Importance	7.4	7.4	6.9	7.1	6.3	6.2	6.4	6.4
Satisfaction	6.8	7.3	7.0	7.0	6.2	6.5	7.0	6.7
Endorsement	7.5	7.4	7.3	7.6	6.7	7.9	7.9	7.0
Interest (New Varieties)	7.2	7.0	7.0	7.0	6.5	7.0	6.9	6.4
Future Purchase								
More	27%	17%	20%	26%	16%	24%	23%	16%
Same	72%	81%	78%	73%	84%	75%	77%	83%
Less	1%	2%	2%	1%	0%	1%	0%	1%

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



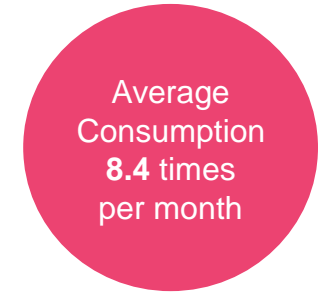
Asian
Vegetables.



Purchase and consumption of Asian vegetables has remained relatively consistent this wave. On average, consumers eat Asian vegetables twice a week. Woolworths and Coles remain the key locations for purchase.

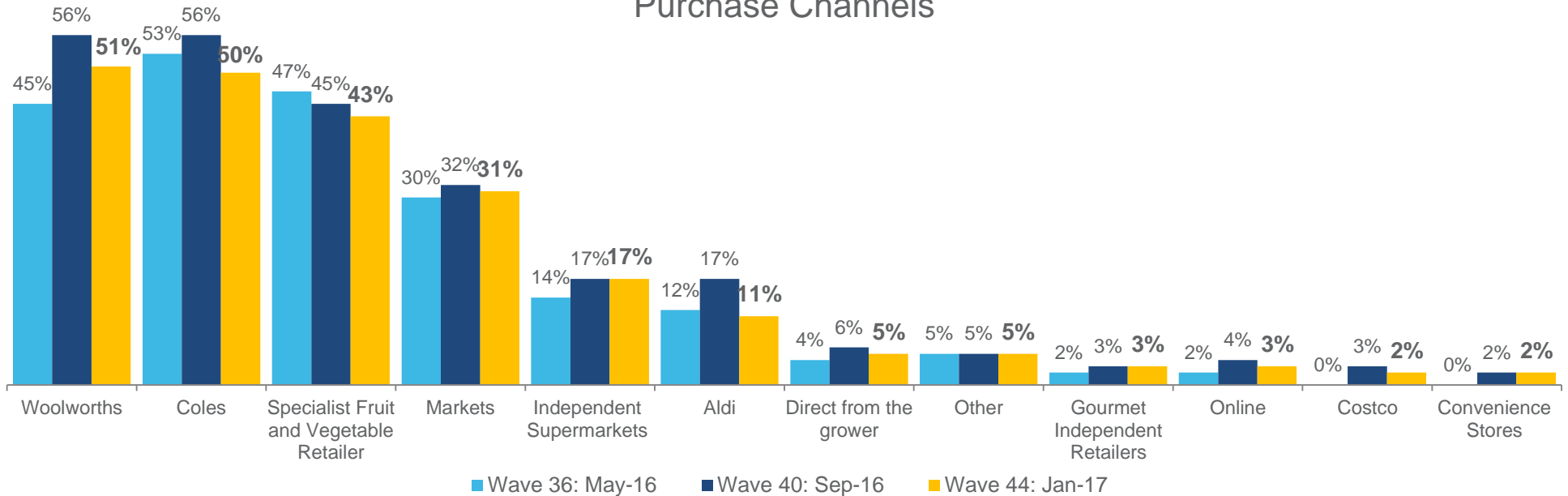


▼ 4.8 times, Wave 36
▲ 5.3 times, Wave 40



▲ 8.6 times, Wave 36
▲ 8.5 times, Wave 40

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 36 N=301, Wave 40 N=306, Wave 44 N=300



Average Spend and Price Sensitivity.



Average weight of purchase

The average consumer typically purchases **0.8kg** of Asian vegetables in January 2017, which is lower than the previous waves.

- ▲ 0.9kg, Wave 36
- ▲ 1.0kg, Wave 40



Recalled last spend

The average recalled last spend in January 2017 is **\$5.20**, which has continued to increase this wave.

- ▼ \$4.60, Wave 36
- ▼ \$5.00, Wave 40



Value for money

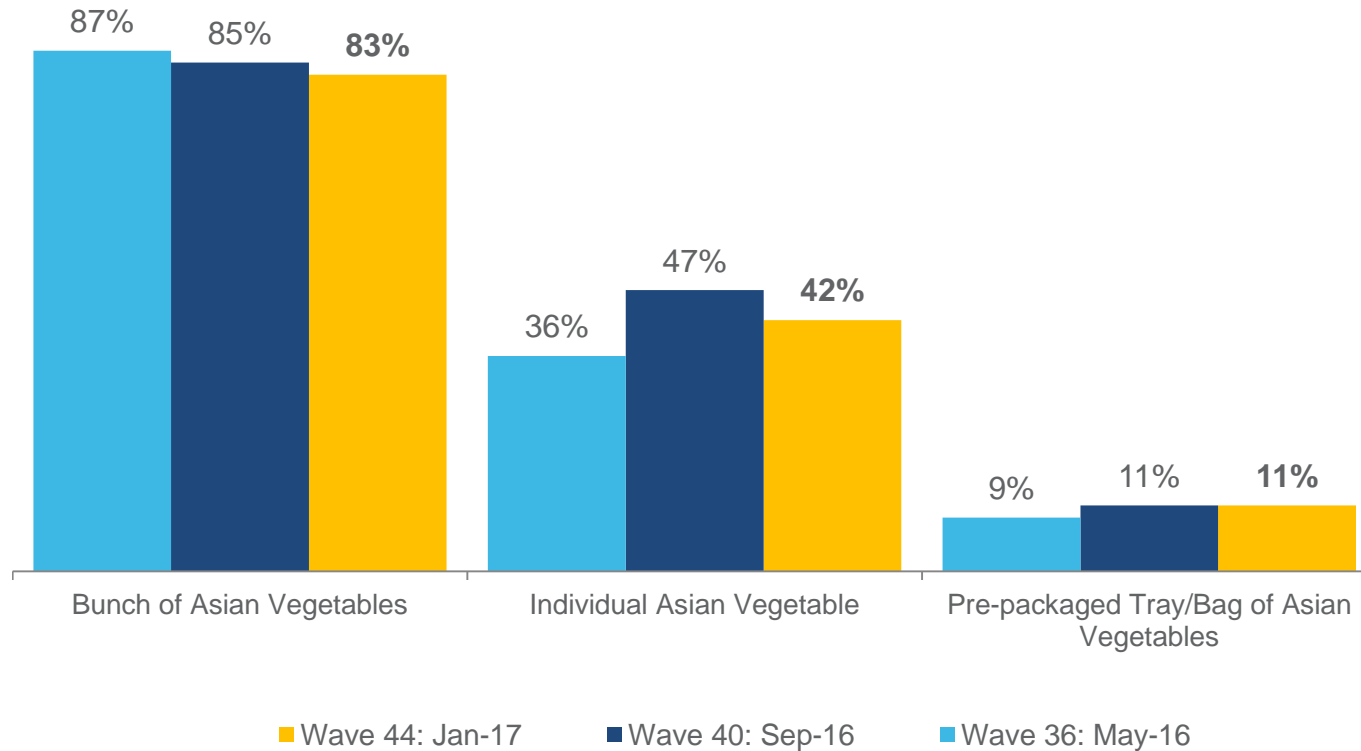
On average, consumers perceive Asian vegetables to be good value for money (**6.8/10**), which remains stable this wave.

- ▲ 7.3/10, Wave 36
- 6.8/10, Wave 40

Q3. How much <commodity> do you typically purchase when you shop for it?
 Q3b. To the best of your memory how much did this cost on your most recent typical purchase?
 Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
 Sample Wave 36 N=301, Wave 40 N=306, Wave 44 N=300



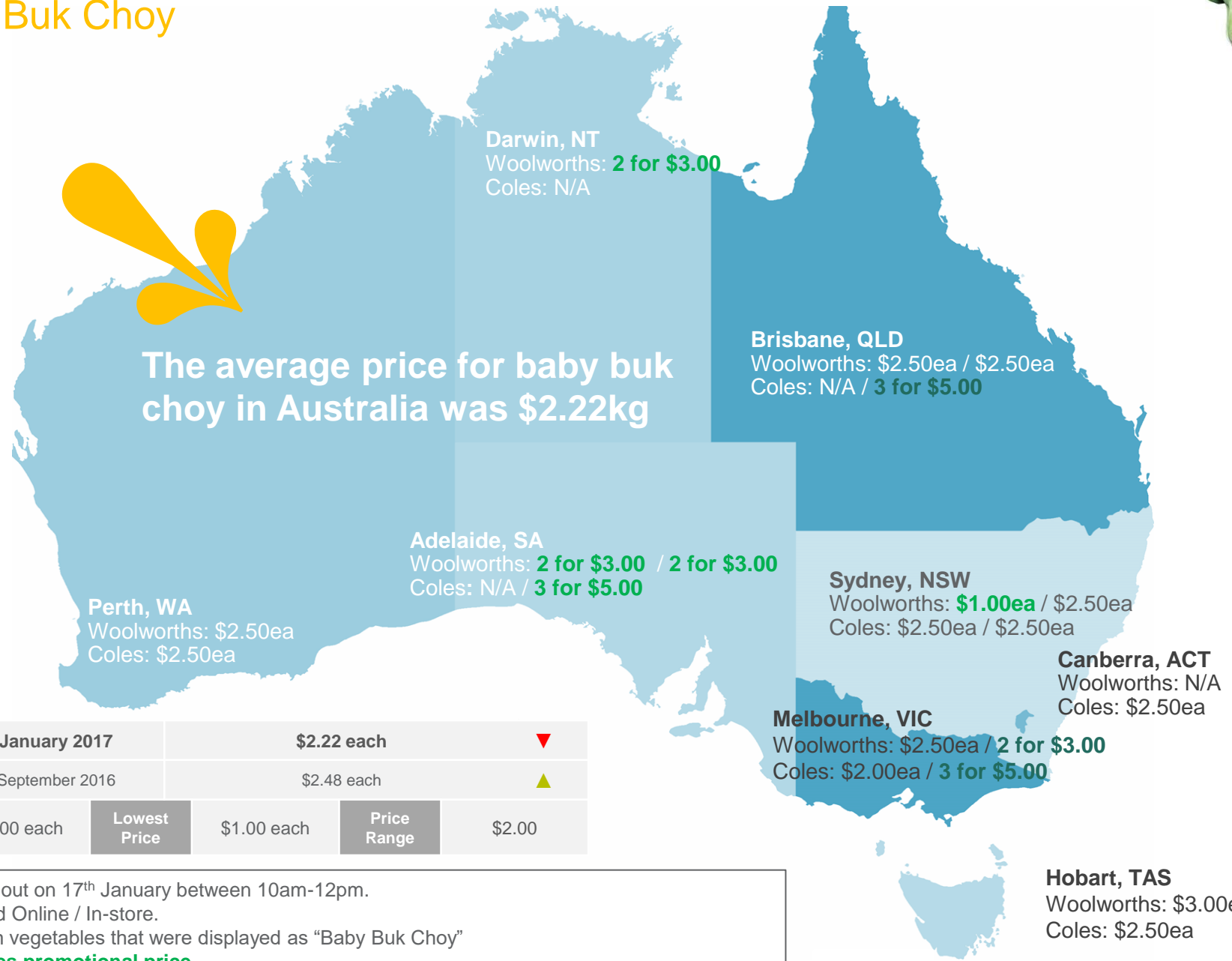
Bunched Asian vegetables continue to be the main format purchased, consistent with previous waves.



Q4b In what fresh formats do you typically purchase Asian vegetables (bok choy, choy sum etc.)?
Sample Wave 36 N=301, Wave 40 N=306, Wave 44 N=300

Online and In-store Commodity Prices.

Baby Buk Choy



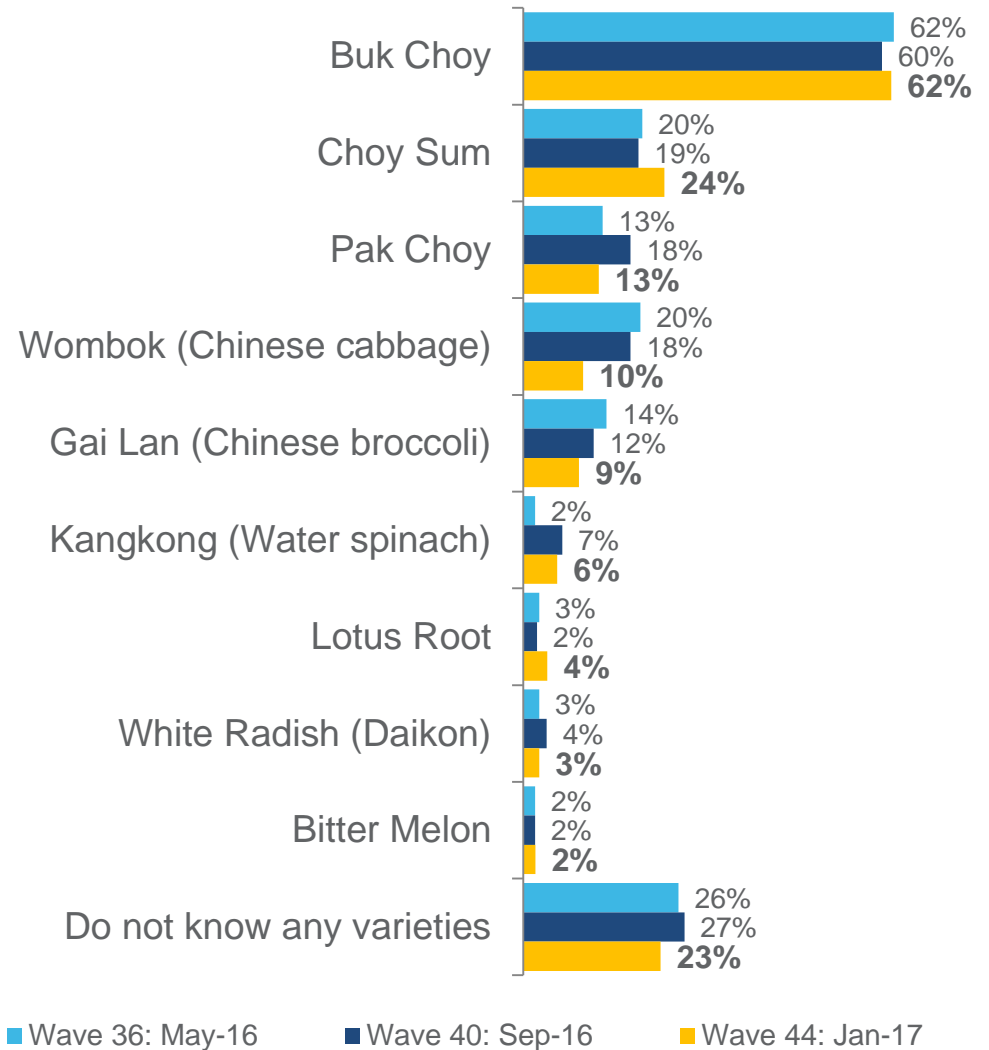
Average Price	January 2017	\$2.22 each	▼		
	September 2016	\$2.48 each	▲		
Highest Price	\$3.00 each	Lowest Price	\$1.00 each	Price Range	\$2.00

Pricing was carried out on 17th January between 10am-12pm.
 Prices are displayed Online / In-store.
 Prices are based on vegetables that were displayed as "Baby Buk Choy"
Green text indicates promotional price.



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

Buk Choy and Choy Sum have the greatest recall amongst consumers, with lower awareness in Pak Choy, Wombok and Gai Lan this wave.



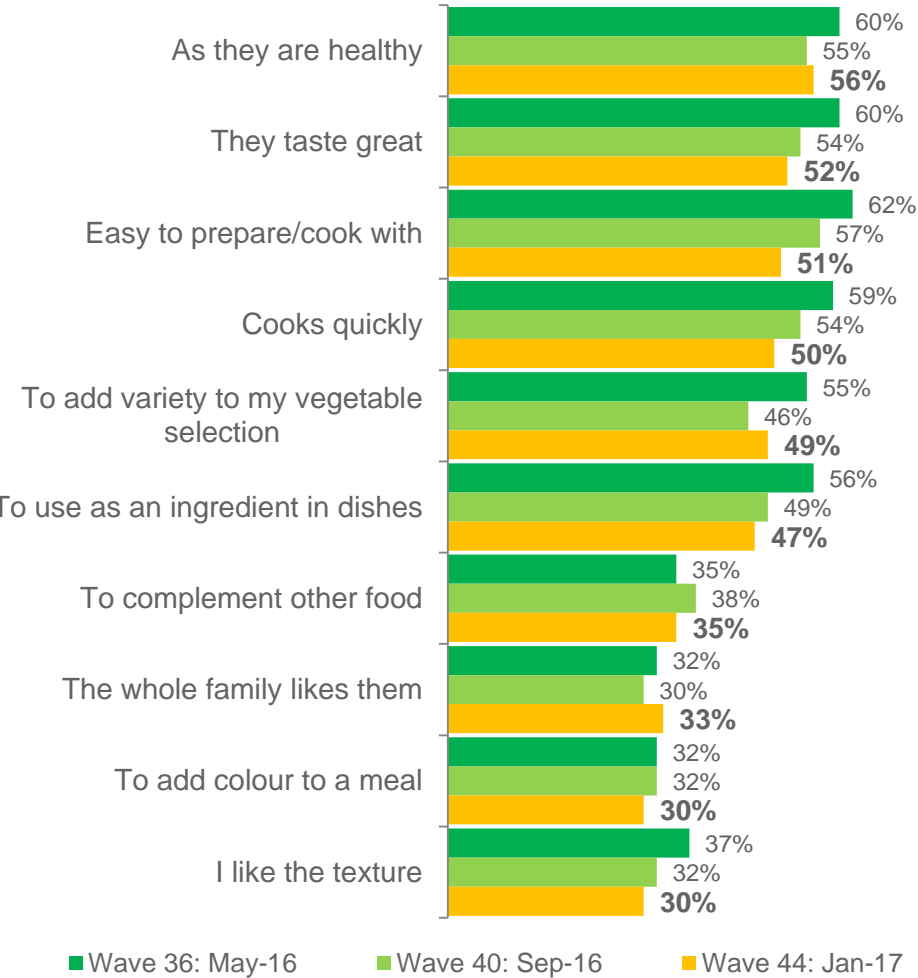
Q6a. What varieties/types of <commodity> are you aware of? (unprompted)
Sample Wave 36 N=301, Wave 40 N=306, Wave 44 N=300



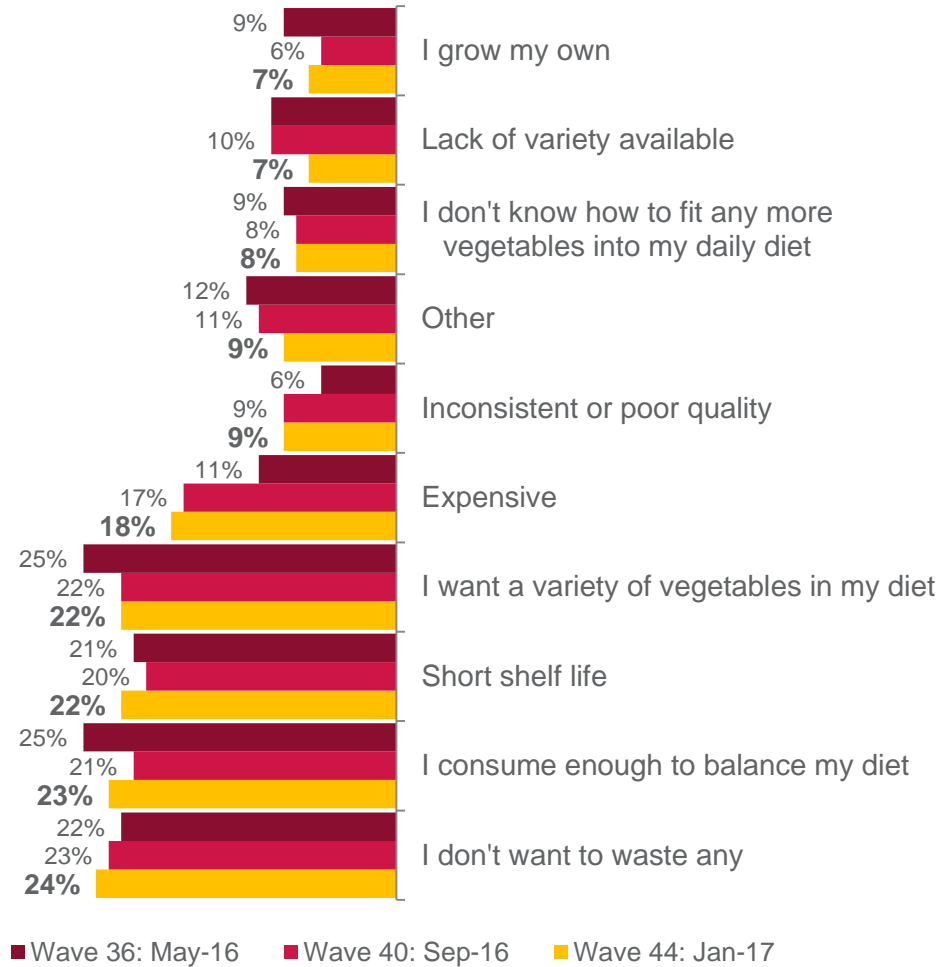
Health and taste are the main drivers of purchase. The key barriers to purchase are not wanting to waste any and already consuming enough to balance their diet. Ease of preparation and cooks quickly have eased as triggers to purchase over the last three waves.



Triggers



Barriers



Q7. Which of the following reasons best describes why you purchase <commodity>?
 Q8. Which reason best describes why you don't buy <commodity> more often?
 Sample Wave 36 N=301, Wave 40 N=306, Wave 44 N=300



Asian vegetables are generally eaten at dinner time, with one in four consumers using Asian vegetables when cooking a new recipe.

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

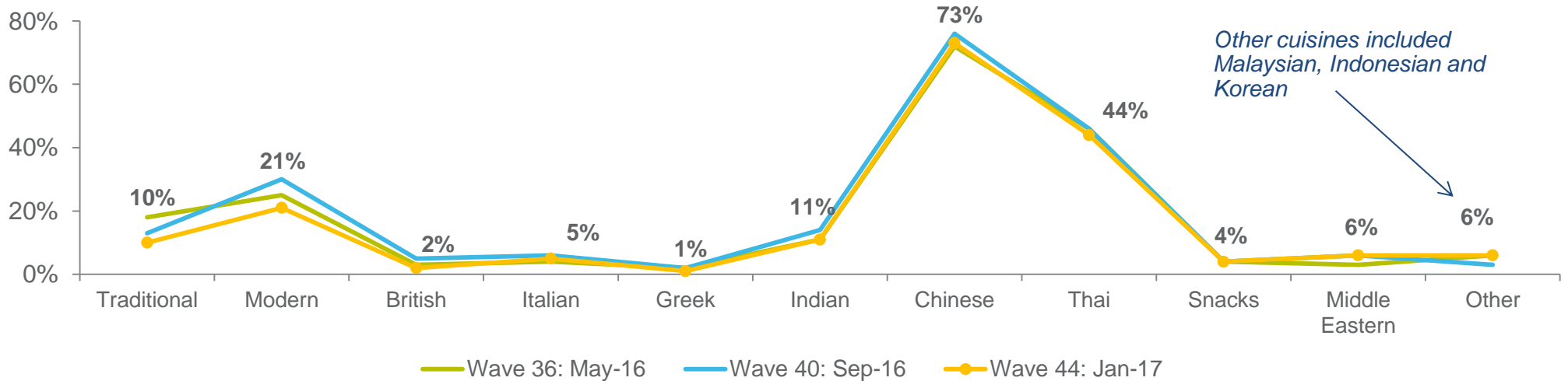
Top 5 Consumption Occasions

	Wave 40	Wave 44
Dinner	72%	67%
Family meals	57%	54%
Quick Meals	51%	51%
Weekday meals	49%	47%
Weekend meals	42%	40%

25% used Asian vegetables when cooking a new recipe

▼ 24%, Wave 40

Typical Cuisine Cooked



Other cuisines included Malaysian, Indonesian and Korean



Q10. What cuisines do you cook/consume that use <commodity>?
 Q11. Which of the following occasions do you typically consume/use <commodity>?
 Sample Wave 36 N=301, Wave 40 N=306, Wave 44 N=300

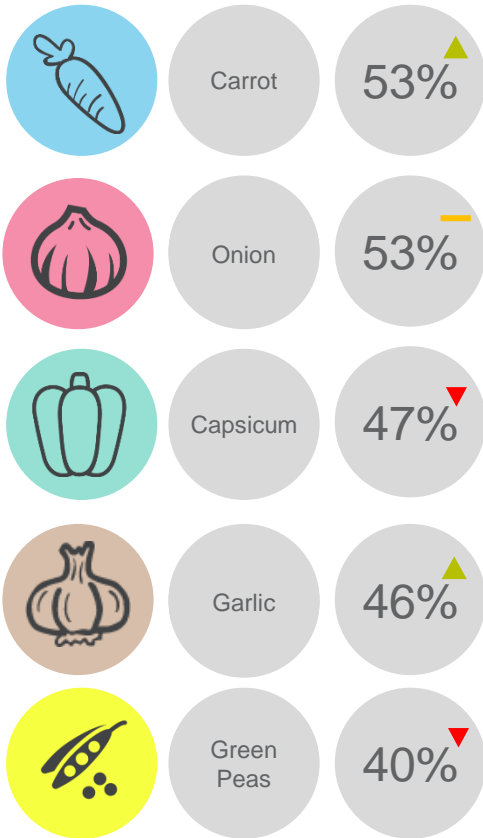


▼ : Indicates LOWER score than current wave.
 ▲ : Indicates HIGHER score than current wave.



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

Accompanying Vegetables



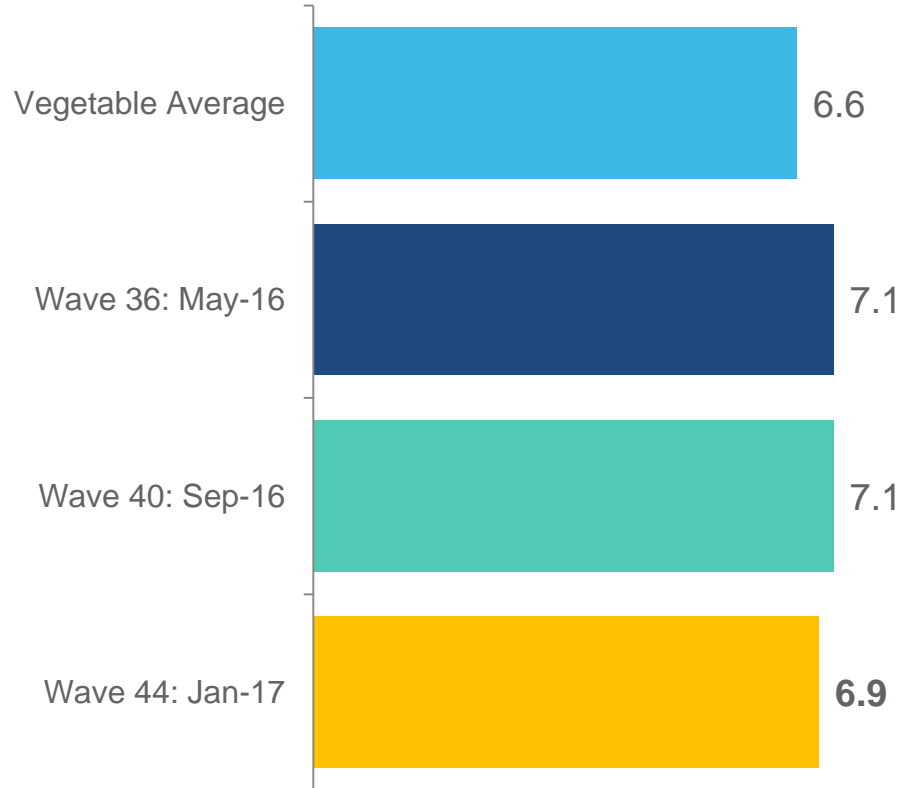
Top Cooking Styles

	Wave 36	Wave 40	Wave 44
Stir frying	81%	80%	78%
Steaming	46%	42%	43%
Soup	26%	28%	26%
Sautéing	26%	26%	23%
Boiling	19%	16%	17%
Frying	18%	19%	16%
Raw	8%	14%	13%
Microwave	8%	9%	8%
Slow Cooking	9%	10%	7%
Grilling	4%	5%	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 36 N=301, Wave 40 N=306, Wave 44 N=300



Asian vegetable provenance has slightly declined this wave, but still sits above the Vegetable Average.



Q14. When purchasing <commodity>, how important is Provenance to you?
Q15. And when purchasing <commodity>, how important is that it is grown in Australia?
Mean scores out of 10.
Sample Wave 36 N=301, Wave 40 N=306, Wave 44 N=300

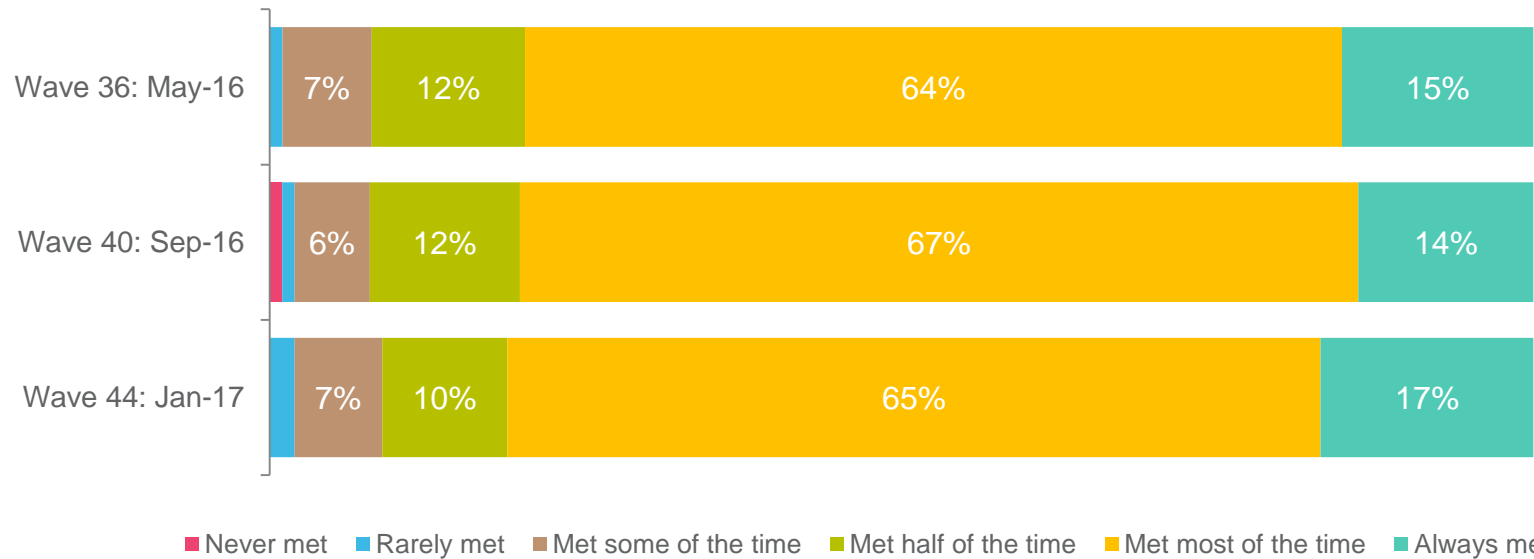


Once purchased, consumers expect Asian vegetables to remain fresh for just under one week. Expectations of freshness are met most of the time, consistent with past waves.

Expected to stay fresh for 6.1 days

- ▲ 6.5 days, Wave 36
- ▲ 6.3 days, Wave 40

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 36 N=301, Wave 40 N=306, Wave 44 N=300



Trends: Asian Vegetables

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





Innovative Asian Vegetables Launches: L3M (October 2016 – January 2017)

Earthbound Farm Organic Asian Greens (Canada)

Earthbound Farm Organic Asian Greens are described as a zesty blend of baby kale, Asian greens and baby spinach. The USDA organic product has been triple washed and is rich in vitamin A and grown without GMOs. The wonderfully versatile vegetables retail in a 142g recyclable pack bearing the Facebook, Twitter, Instagram and Pinterest logos.



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

Avoca To Go Asian Stir Fry Greens, Soy & Sesame (Ireland)

Avoca To Go Asian Stir Fry Greens, Soy & Sesame is now available. This product retails in a 420g pack.



Claims:
On-the-Go

Coop Betty Bossi Let's Cook! Asian Wok Seoul (Switzerland)

Coop Betty Bossi Let's Cook! Mélange de Légumes (Asian Wok Seoul) is now available. This ready-to-use product comprises mixed vegetables, and is said to provide one out of five recommended portions of fruits and vegetables a day. It retails in a 300g pack.



Claims:
Ease of Use



Capsicums.

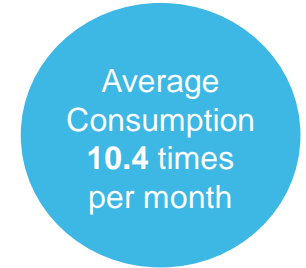


There was an increase in both purchase and consumption occasions this wave.

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

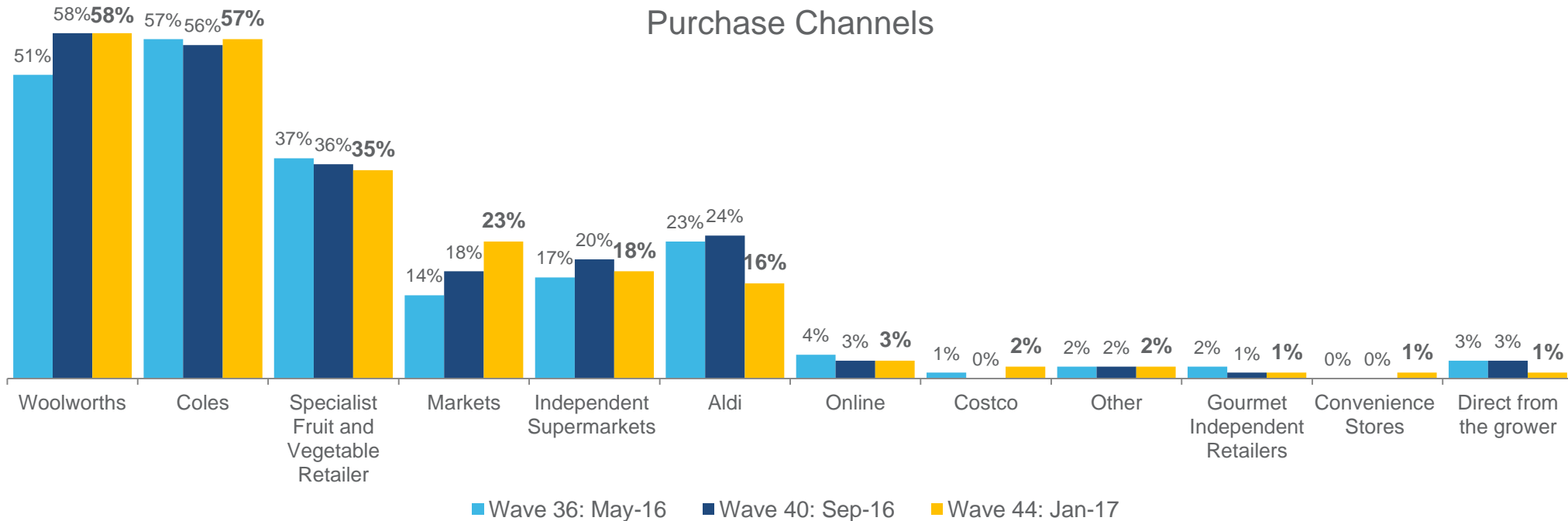


- ▼ 3.7 times, Wave 36
- ▼ 4.3 times, Wave 40



- ▼ 9.6 times, Wave 36
- ▼ 9.5 times, Wave 40

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 36 N=306, Wave 40 N=302, Wave 44 N=303



Average Spend and Price Sensitivity



Average weight of purchase

The average consumer typically purchased **700g** of capsicum in January 2017, slightly higher than previous waves.

- ▼ 600g, Wave 36
- ▼ 600g, Wave 40



Recalled last spend

The average recalled last spend for capsicum was **\$4.40**, which has increased this wave.

- ▼ \$4.00, Wave 36
- ▼ \$3.80, Wave 40



Value for money

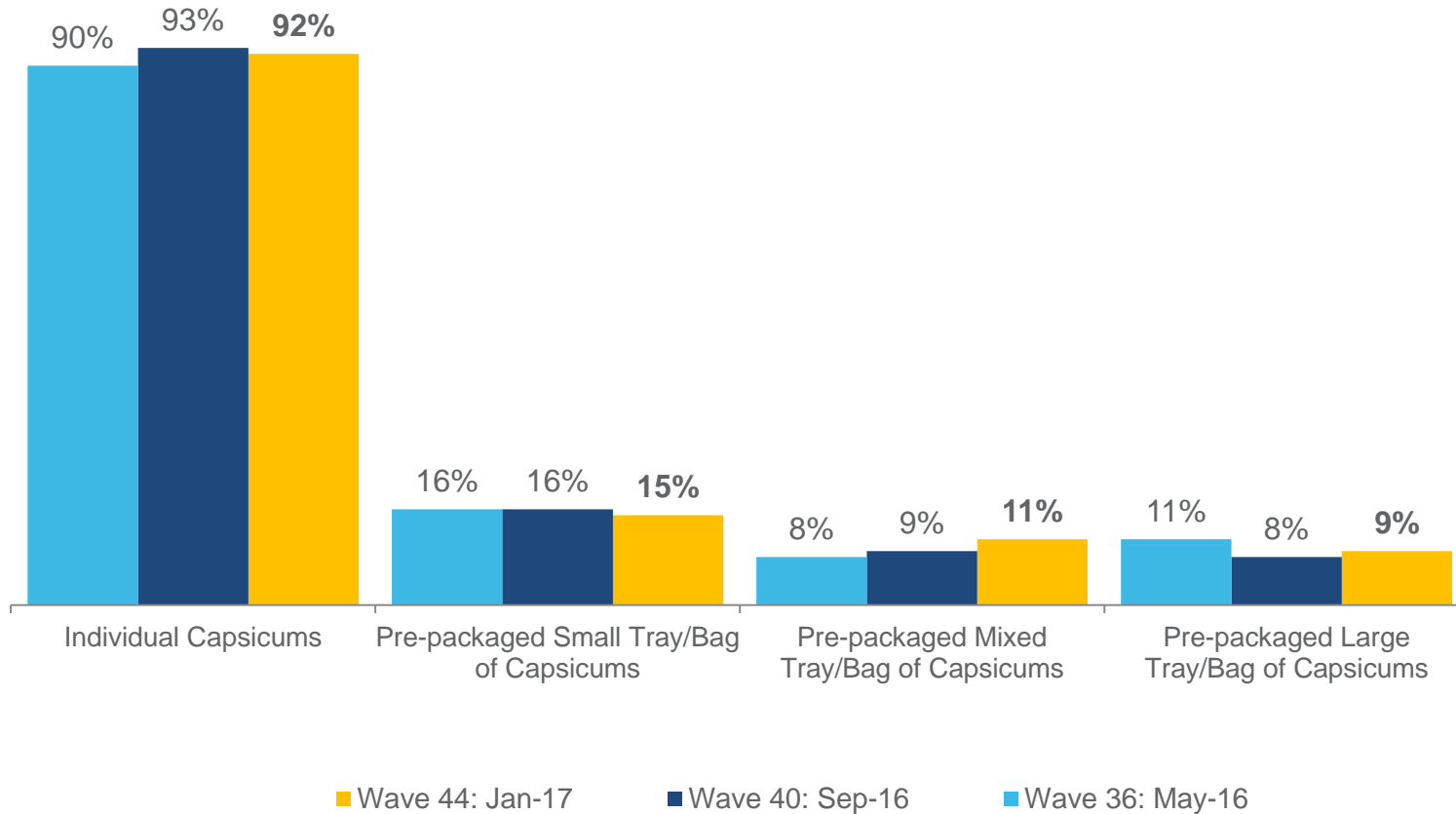
On average, consumers perceived capsicum to be fair value for money **(6.0/10)**, which has declined this wave.

- ▲ 6.3/10, Wave 36
- ▲ 6.3/10, Wave 40

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 36 N=306, Wave 40 N=302, Wave 44 N=303



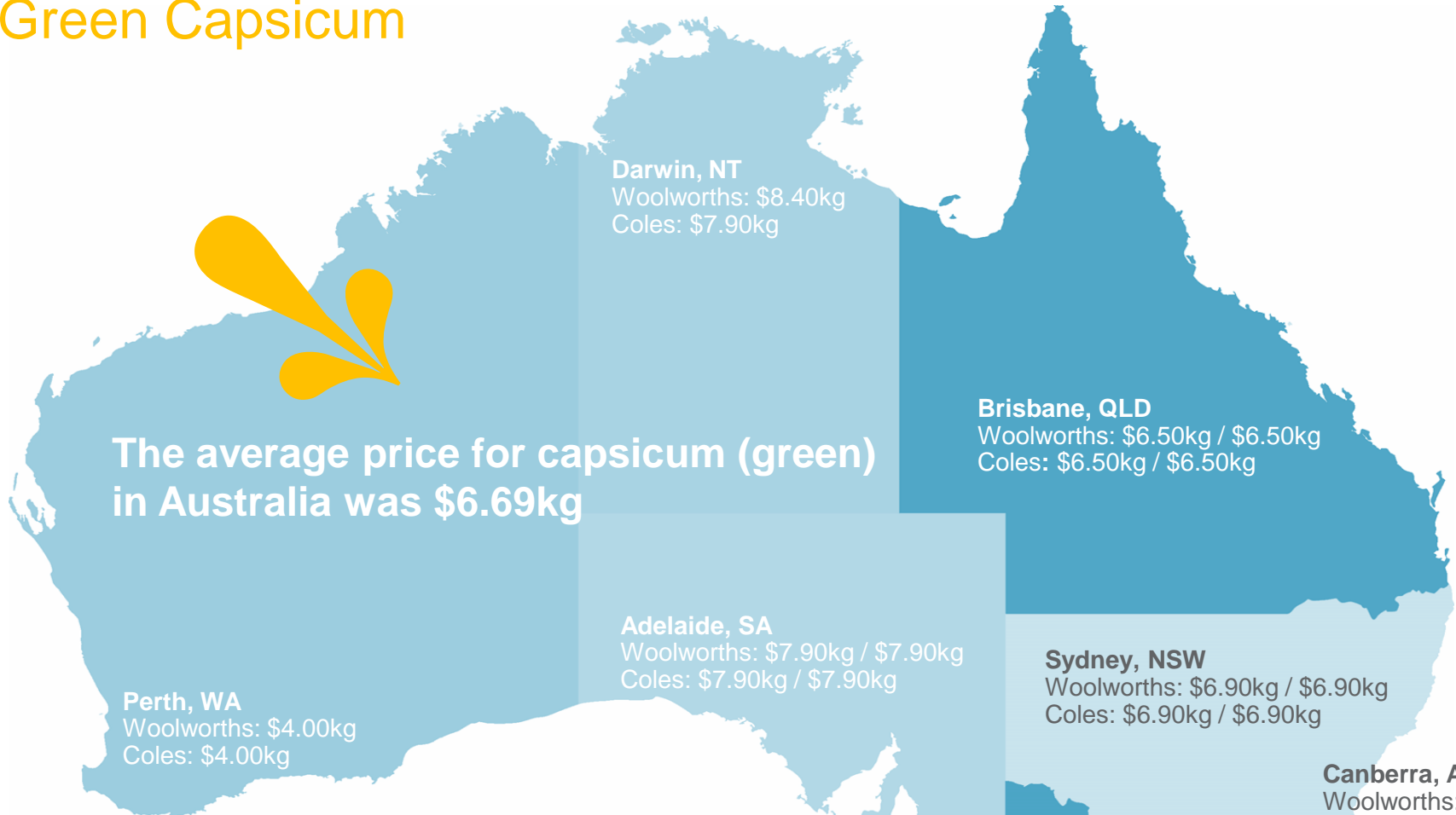
Individual capsicums remain the key format for purchase, consistent with previous waves.



Q4b. In what fresh formats do you typically purchase Capsicums?
Sample Wave 36 N=306, Wave 40 N=302, Wave 44 N=303

Online and In-store Commodity Prices

Green Capsicum

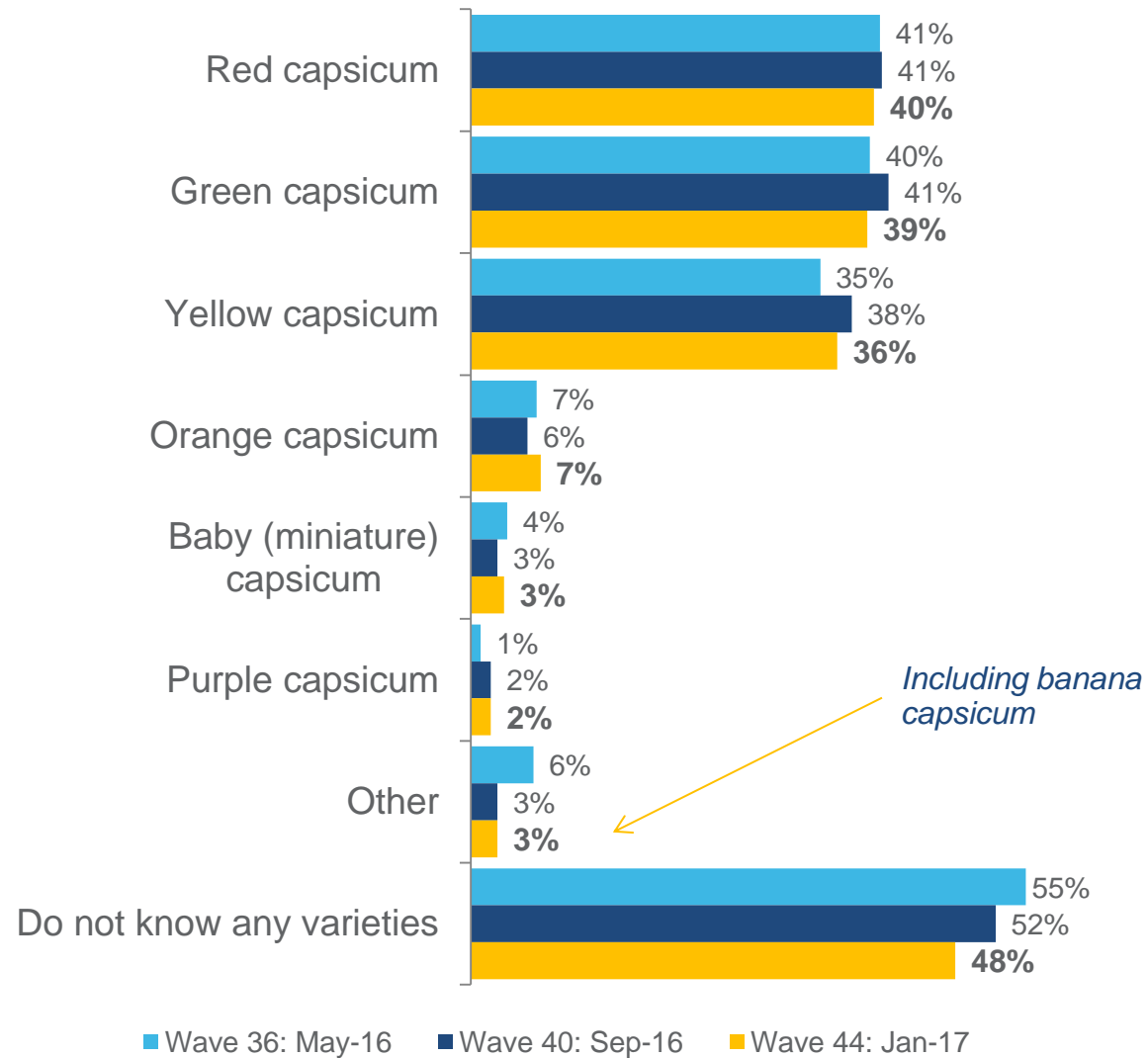


Average Price	January 2017	\$6.69 per kg ▲			
	September 2016	\$5.72 per kg ▼			
Highest Price	\$8.40 per kg	Lowest Price	\$4.00 per kg	Price Range	\$4.40

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



Red, green and yellow capsicums have the greatest level of recall. Just under half of consumers could not recall a type of capsicum this wave.

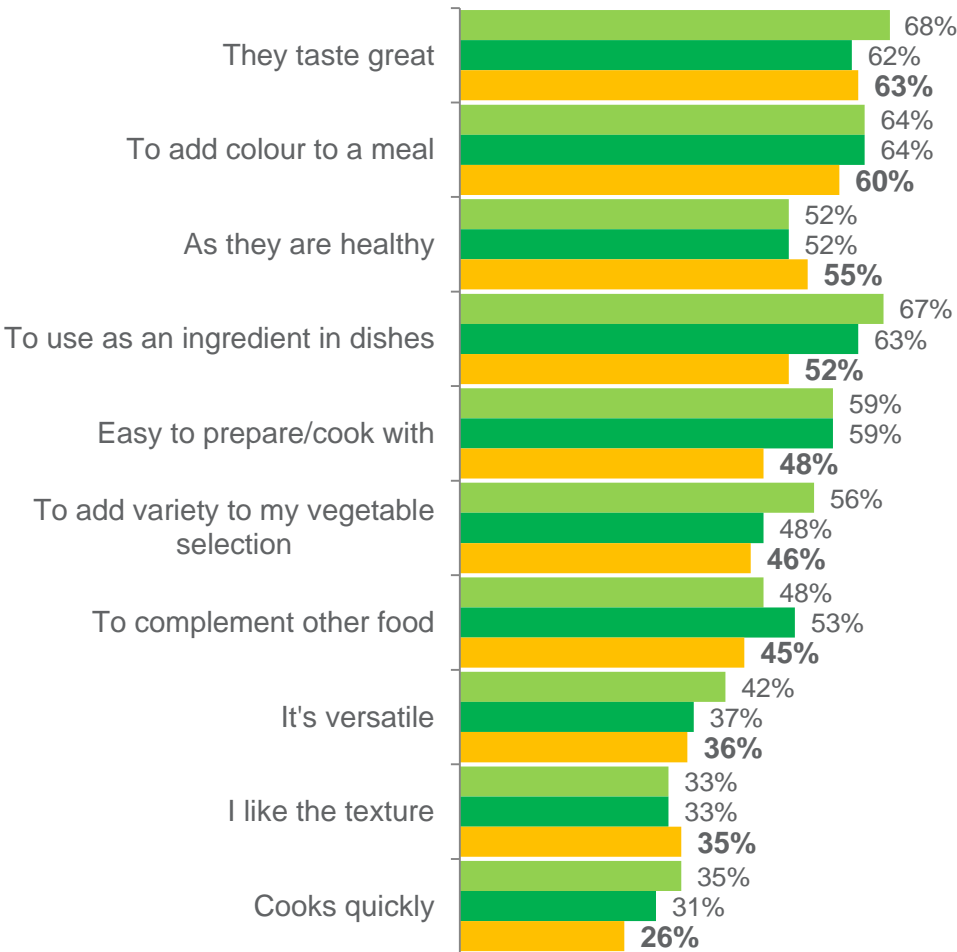




The key triggers to purchase are taste and adding colour to a meal. The main barriers to purchase are price and already consuming enough. There has been an declining trend in use as an ingredient in dishes, adding variety, versatility and cooking quickly as triggers to purchase.

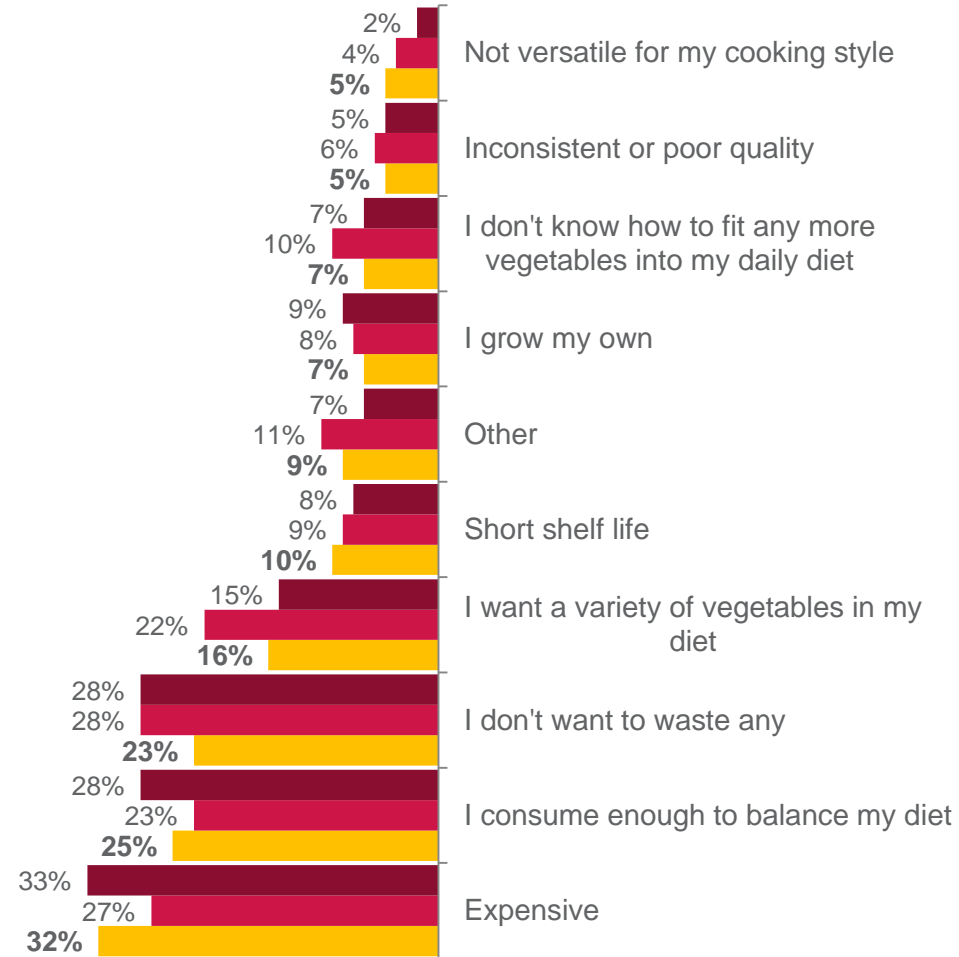


Triggers



■ Wave 36: May-16 ■ Wave 40: Sep-16 ■ Wave 44: Jan-17

Barriers



■ Wave 36: May-16 ■ Wave 40: Sep-16 ■ Wave 44: Jan-17

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 36 N=306, Wave 40 N=302, Wave 44 N=303



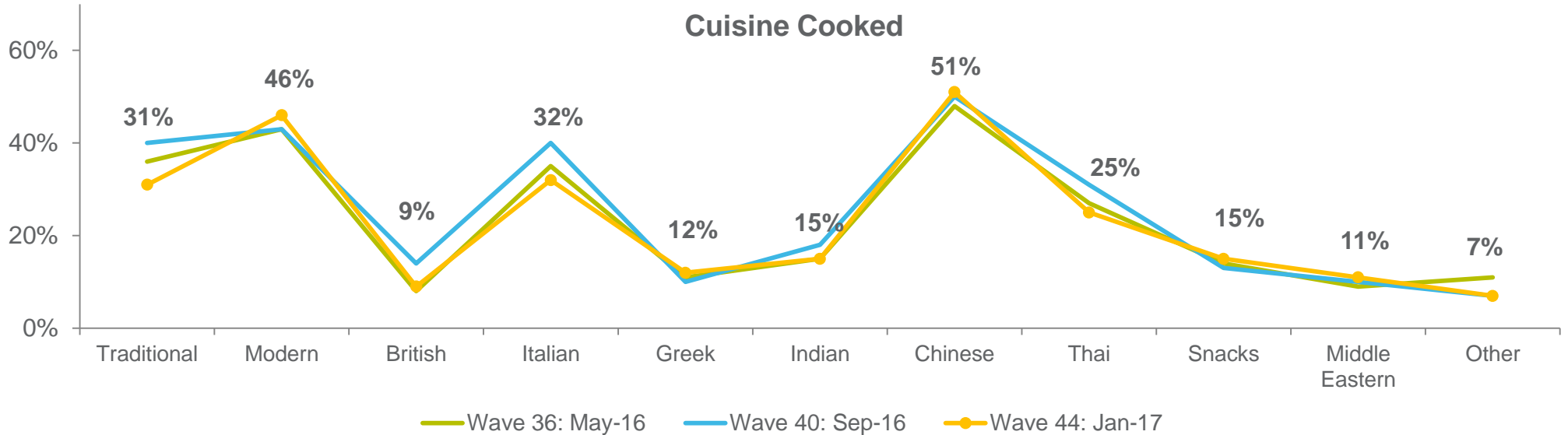
Capsicums are most frequently cooked in Asian, Australian and Italian cuisine, particularly Chinese and Modern Australian. Dinner remains the main consumption occasion.

Top 5 Consumption Occasions

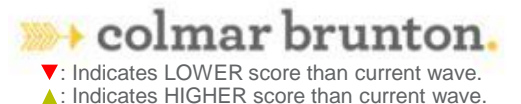
	Wave 40	Wave 44
Dinner	75%	71%
Family meals	60%	60%
Weekday meals	55%	50%
Quick Meals	50%	49%
Weekend meals	48%	44%

22%
used capsicum
when cooking a
new recipe

▼ 21%, Wave 40

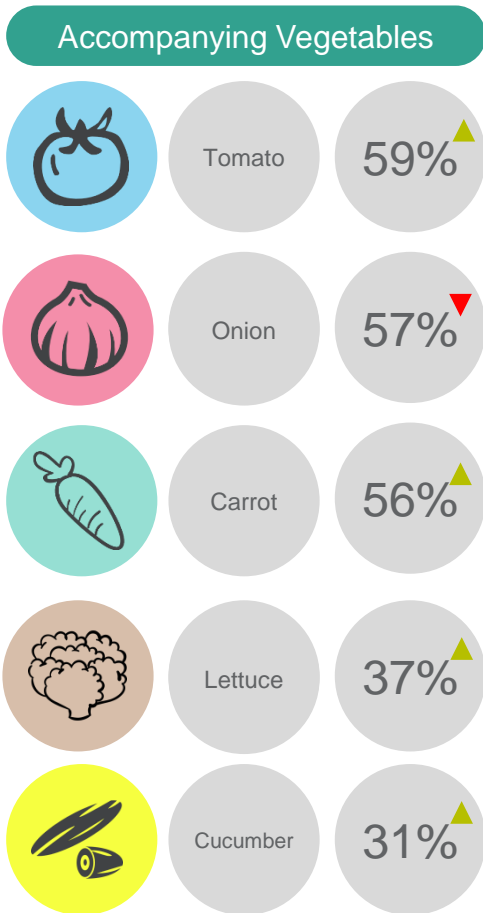


Q10. What cuisines do you cook/consume that use <commodity>?
 Q11. Which of the following occasions do you typically consume/use <commodity>?
 Sample Wave 36 N=306, Wave 40 N=302, Wave 44 N=303





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



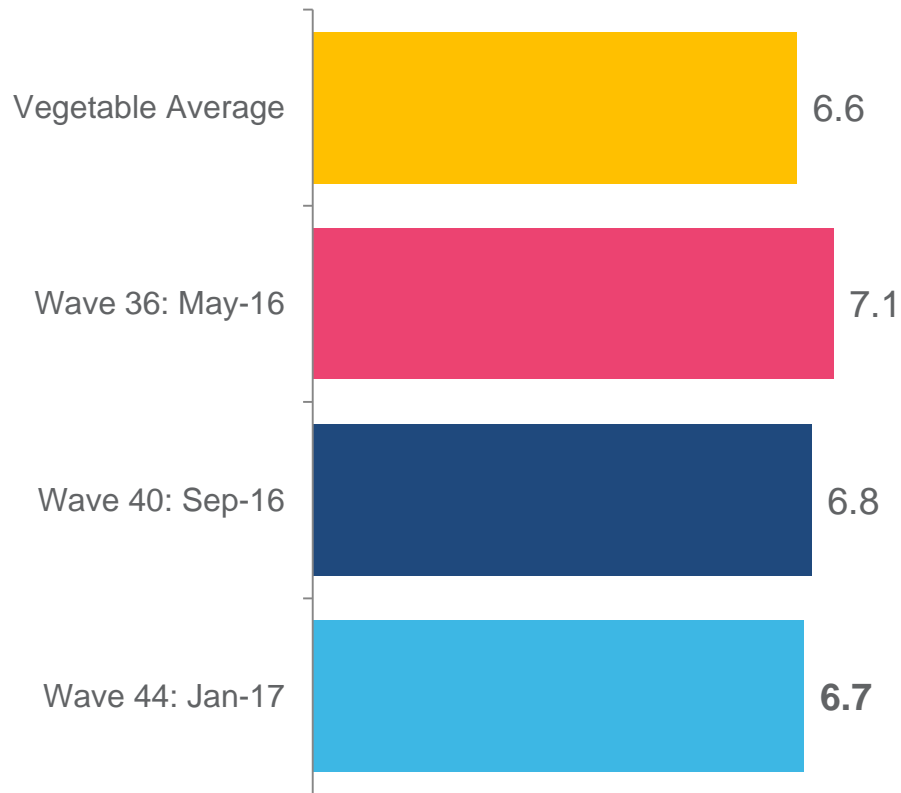
Top 10 Cooking Styles

	Wave 36	Wave 40	Wave 44
Stir frying	74%	71%	69%
Raw	57%	57%	54%
Roasting	33%	30%	28%
Sautéing	23%	27%	27%
Frying	30%	30%	26%
Grilling	20%	23%	17%
Slow Cooking	24%	24%	15%
Baking	18%	21%	15%
Soup	19%	17%	13%
Steaming	10%	10%	9%

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 36 N=306, Wave 40 N=302, Wave 44 N=303



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



Q14. When purchasing <commodity>, how important is Provenance to you?
Mean scores out of 10.
Sample Wave 36 N=306, Wave 40 N=302, Wave 44 N=303

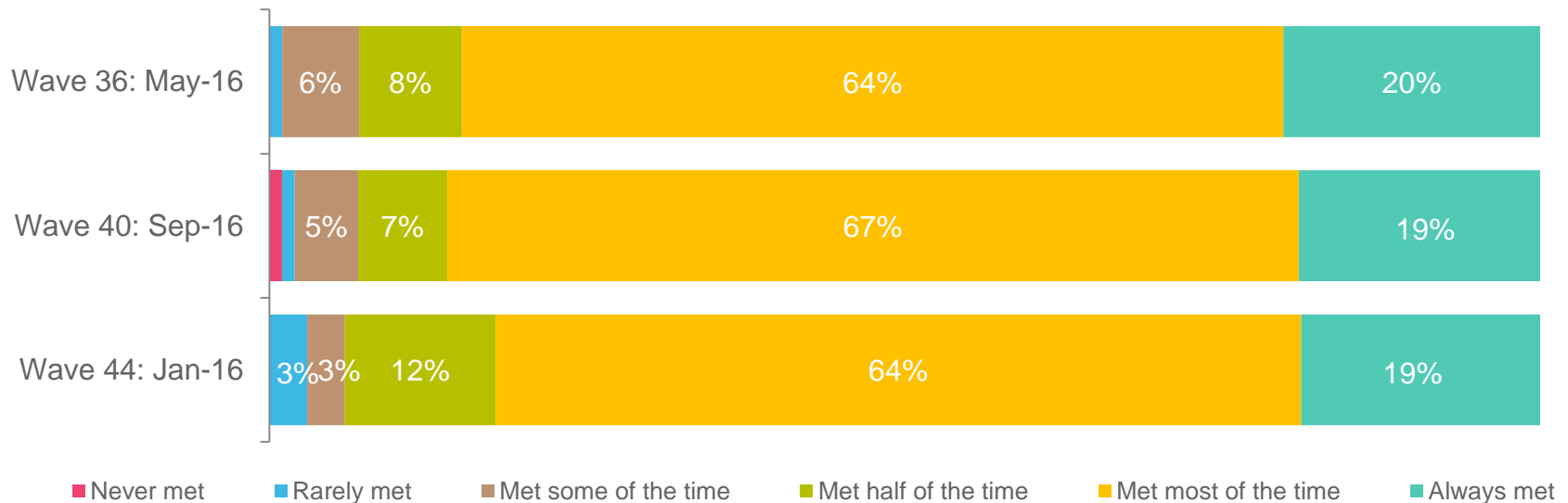


Capsicums are expected to remain fresh for approximately eight days once purchased, which has slightly declined this wave. Expectations of freshness remains consistent with past waves and is being met at least most of the time.

Expected to stay fresh for 8.4 days

- ▲ 9.0 days, Wave 36
- ▲ 8.7 days, Wave 40

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 36 N=306, Wave 40 N=302, Wave 44 N=303



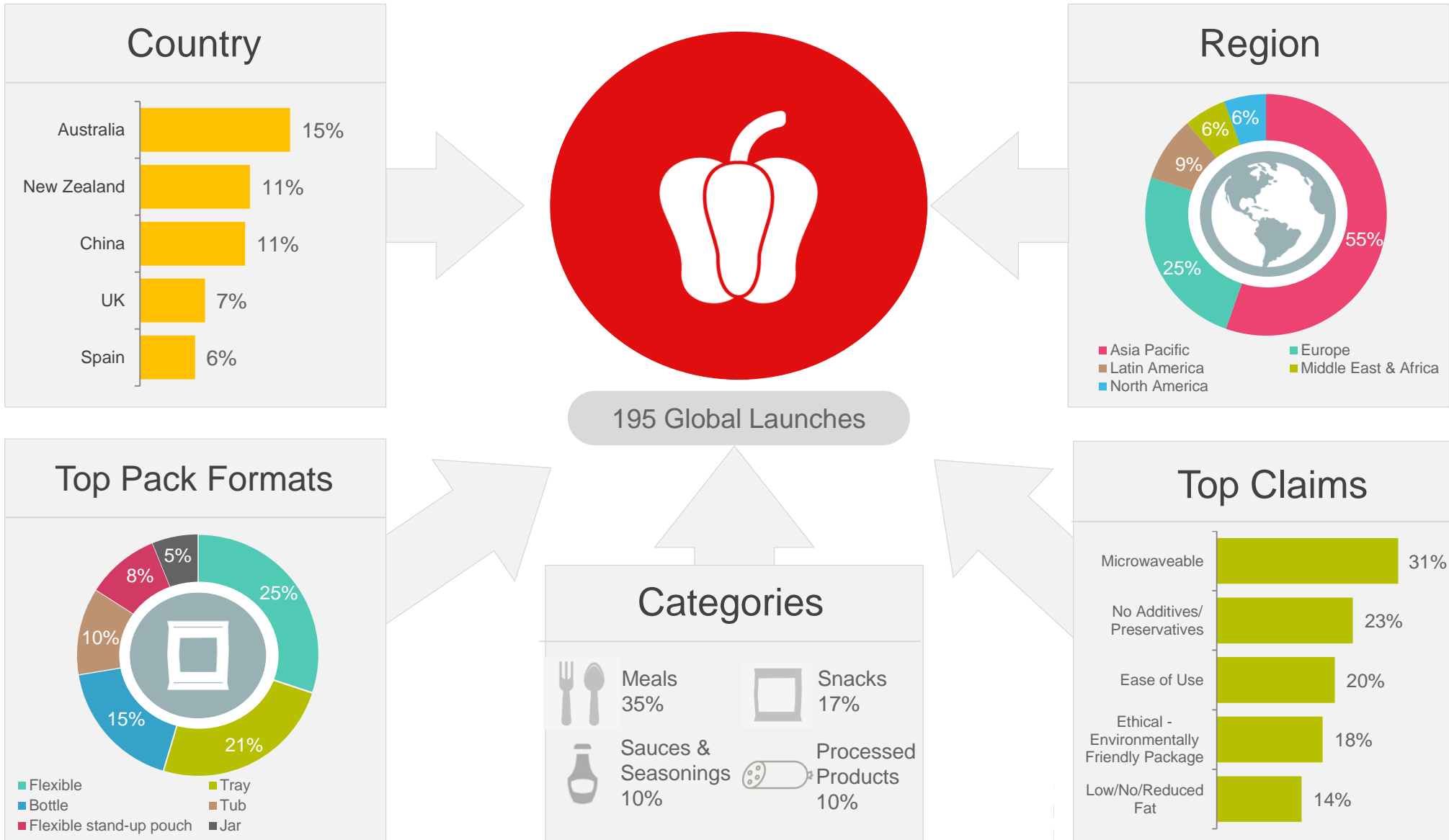
Trends: Capsicums



Capsicum Global NPDs.

October 2016 – January 2017

There were 195 products launched over the last three months that contained Capsicum as an ingredient. A large portion of these products were launched in Asia Pacific; Australia, New Zealand and China. New products were meals, snacks and sauces.





Capsicum Product Launches: Last 3 Months (October 2016 – January 2017) Summary

- There were 195 products launched globally in the last three months that contained capsicum as an ingredient.
- There were 30 products launched in Australia, the most launches of any country this wave.
- Top countries for launches were Australia (15%), New Zealand (11%) and China (11%), with over half of products launched in the Asia Pacific region.
- Flexible packs (25%) and trays (21%) were the most used forms of packaging over the last three months.
- Meals (35%) and snacks (17%) were the main launch category for products containing capsicum.
- Product claims used were microwaveable (31%), no additives/preservatives (23%), and ease of use (20%).
- The most innovative product was an Indian Heat and Eat Wrap from New Zealand (examples of these can be found in the following pages).



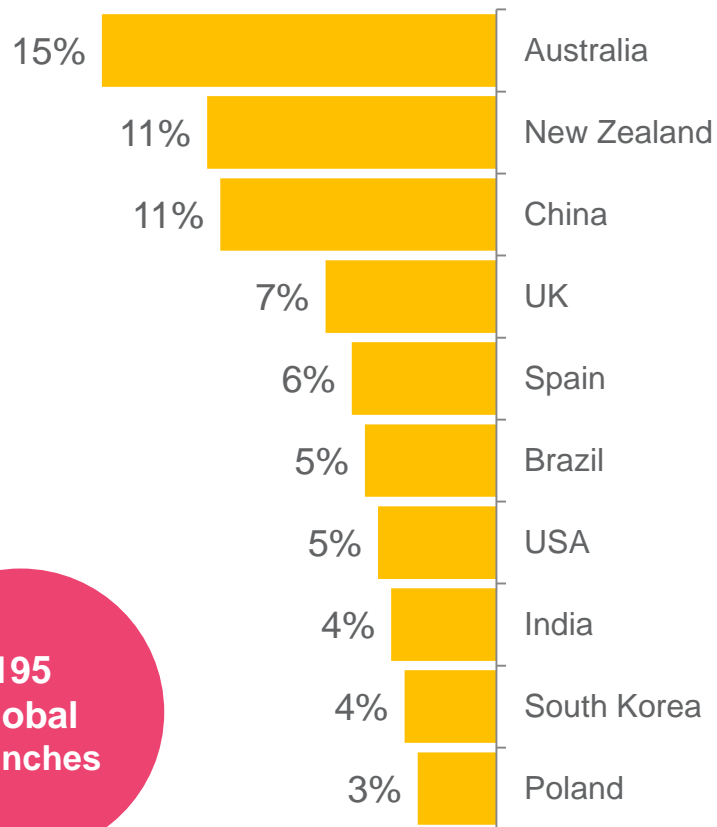
Source: Mintel (2016)



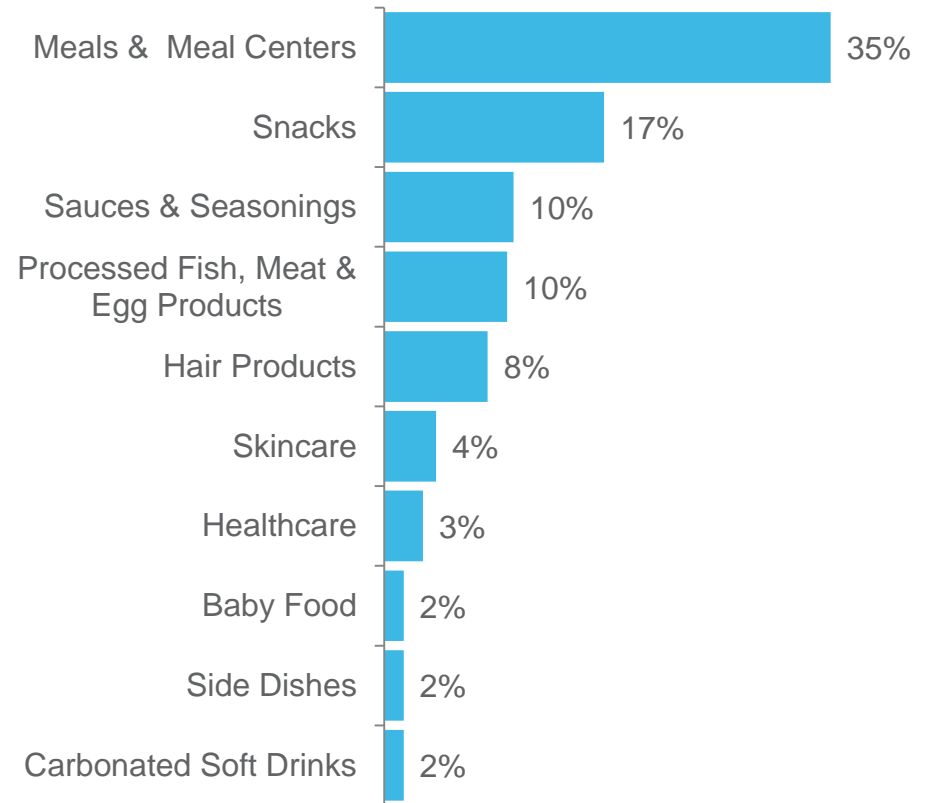


Australia and New Zealand had the greatest number of capsicum product launches over the last 3 months. Meals & meal centers, and snacks were the main launch categories this wave.

Top Launch Countries



Top Launch Categories












195
Global
Launches














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

Pack Formats Used

Global		Flexible	25%
		Tray	21%
		Bottle	15%
Asia Pacific		Flexible	30%
		Tray	26%
		Tub	17%
Europe		Flexible	27%
		Tray	21%
		Bottle	17%

Top Claims Used

Global		Microwaveable	31%
		No Additives/Preservatives	23%
		Ease of Use	20%
Asia Pacific		Microwaveable	45%
		No Additives/Preservatives	31%
		Ethical - Environmentally Friendly Package	27%
Europe		Gluten-Free	25%
		Low/No/Reduced Allergen	25%
		Ease of Use	25%

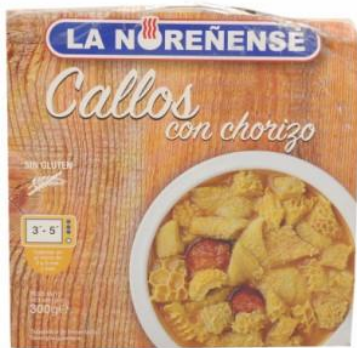
Only regions with n >30 are displayed

»»» Innovative Capsicum Launches:

L3M (October 2016 – January 2017)

La Noreñense Tripe with Chorizo (Spain)

La Noreñense Callos con Chorizo (Tripe with Chorizo) is now available. The sterilised gluten-free product can be microwaved in three to five minutes, is ready to eat, and retails in a 300g pack.



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

Black Swan Classic Guacamole (Myanmar)

Black Swan Classic Guacamole is now available. The product retails in a 200g pack.



Claims:
N/A

Yorihada Rice Dish with Three Coloured Wild Vegetables (South Korea)

Yorihada Rice Dish with Three Coloured Wild Vegetables is an Andong-style rice dish harmonized with 15.85% fragrant bellflower root and 5.55% soft bracken, as well as perilla oil and roasted sesame. This easy to prepare product can be cooked in the microwave or pan and is ready in three and half or four minutes. It retails in a 450g pack.



Claims:
Microwaveable, Time/Speed, Ease of Use

San Remo Microwavable Couscous with Vegetables (New Zealand)

San Remo Microwavable Couscous with Vegetables comprises couscous is a source of fibre and low in saturated fat. This product can be microwaved in 60 seconds and retails in a 175g pack bearing a QR code, Facebook and YouTube logos and a recipe suggestion.



Claims:
Microwaveable, Time/Speed, Low/No/Reduced Saturated Fat, Social Media

»»» Innovative Capsicum Launches:

L3M (October 2016 – January 2017)

Specially Selected Hand Stuffed Halkidiki Chilli Olives (UK)

Specially Selected Hand Stuffed Halkidiki Chilli Olives contain juicy, pitted green Halkidiki olives, hand stuffed with pimento and jalapeno pepper in lemon oil and chilli oil; and are mixed with sweet pepperdrop and piri piri peppers. The product has no artificial colours, flavourings or preservatives; is suitable for vegetarians; and retails in a 150g partly recyclable pack.



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

The Wrappery Indian Heat & Eat Wrap (New Zealand)

The Wrappery Indian Heat & Eat Wrap comprises tandoori marinated chicken slow cooked in classic Indian spices combined with rice and wrapped in a flour tortilla. The fresh, hand made, ready-to-go product can be warmed in a microwave or conventional oven, and retails in a 275g pack.



Claims:
Microwaveable, On-the-Go, Ease of Use

M&S Spirit of Summer Cheese & Pickle Bites (France)

M&S Spirit of Summer Fromage et Cornichons (Cheese & Pickle Bites) comprise a delicious selection of hickory smoked red Leicester cheese, Monterey Jack cheese, pickled gherkins and Roquito chilli peppers. The product is suitable for vegetarians, and retails in a 180g pack.



Claims:
Vegetarian, Seasonal

Hampton Farms Honey Chipotle Cashews (USA)

Hampton Farms Honey Chipotle Cashews are made with all natural ingredients including highest quality whole cashews and sweetened them with real honey combined with spicy chipotle flavour. They are hand roasted in small batches to provide the best flavor and crunch every time. This vegan product is kosher certified and free from gluten and cholesterol, and retails in an 8-oz. resealable pouch.



Claims:
All Natural Product, Low/No/Reduced Cholesterol, Kosher, Gluten-Free, Low/No/Reduced Allergen, Vegan, Convenient Packaging, No Animal Ingredients

»»» Innovative Capsicum Launches:

L3M (October 2016 – January 2017)

Oho! Nacho Cheese Balls (Sweden)

Oho! Majschips med Ost (Nacho Cheese Balls) comprise corn snacks with cheese. The product retails in a 200g pack.



Claims:
N/A

Gingerella Ginger Ale Soft Drink (UK)

Gingerella Ginger Ale Soft Drink has been repackaged with a new design. The product is made from ginger, which is grown organically by Fairtrade farmers in the highlands of Sri Lanka. Its clean crisp and fiery kick comes from a unique blend of organic lemons, Fairtrade organic ginger, vanilla, sugar and a fair deal for the people who grow them. It retails in a pack, containing four 250ml units, and featuring a social media hashtag, and EU Leaf and Soil Organic Association logos.



Claims:
Organic, Ethical - Human, Social Media

The Chefcheoreom Tandoori Chicken Breast (South Korea)

The Chefcheoreom Tandoori Chicken Breast has been relaunched with a new brand name. This microwaveable product is made of 100% Korean chicken breast, provides a moister and tender texture and features an authentic Indian taste. It retails in a 140g pack bearing the HACCP logo.



Claims:
Microwaveable

Carnelly Premium Cabano Sausage (Columbia)

Carnelly Cábano Premium (Premium Cabano Sausage) is new to the range. The product is traditionally smoked and is a good source of proteins. The sausage retails in a 125g pack featuring the HACCP logo.



Claims:
Premium



Australian Innovative Capsicum Launches: L3M (October 2016 – January 2017)

Old El Paso Stand 'N Stuff
Mini Taco Kit



Heinz Pumpkin, Capsicum
& Carrots Puree



Lean Cuisine Pots of Goodness
Indian Tandoori Chicken with
Spinach, Chickpeas, Sunflower
Seeds & Black Quinoa



Masterfoods Pour & Bake
Honey BBQ Chicken
Cooking Sauce



The Real Hotpot Tuscan
Style Chicken



McCain Healthy Choice
Protein Plus Chicken Satay



Coles Thai Spiced Chicken
Breast Fillets



Weight Watchers Gourmet
Menu Creamy Spaghetti
with Prawns





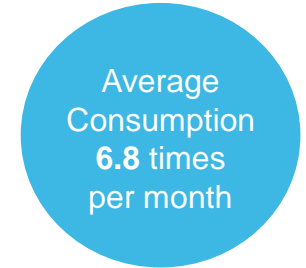
Brussels
Sprouts.



Both average purchase and consumption frequency have continued to increase this wave. Coles and Woolworths remain the key locations for purchase. There is an increasing trend in purchase from markets across the last three waves.

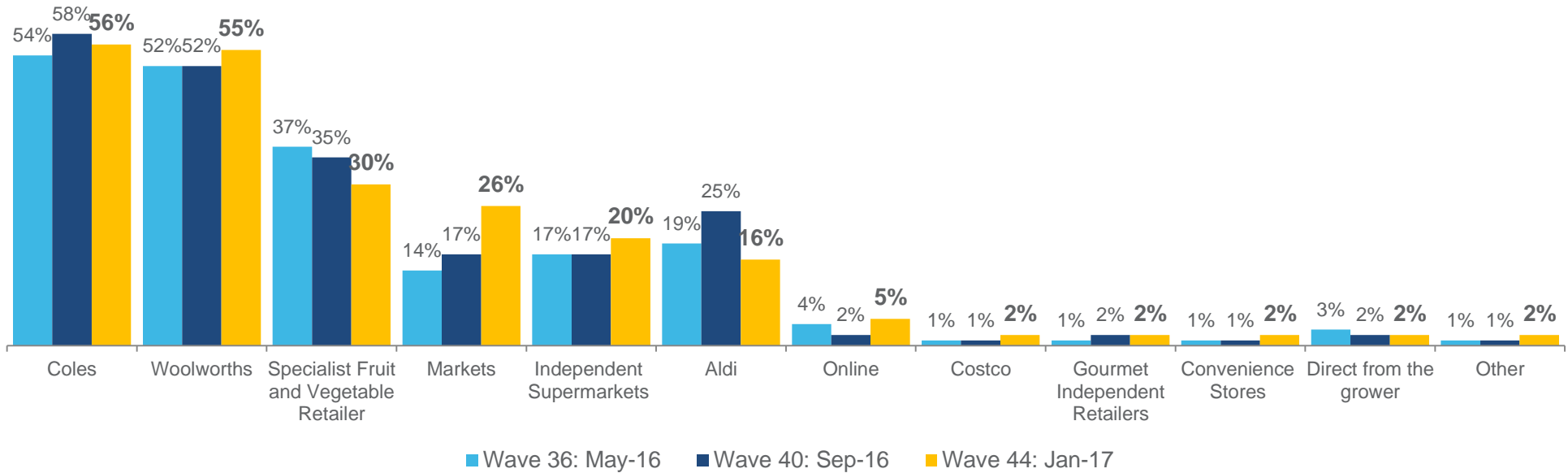


- ▼ 3.1 times, Wave 36
- ▼ 3.3 times, Wave 40



- ▼ 6.4 times, Wave 36
- ▼ 6.5 times, Wave 40

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 36 N=302, Wave 40 N=302, Wave 44 N=301



Average Spend and Price Sensitivity



Average weight of purchase

The average consumer typically purchased **0.7kg** of Brussels sprouts in January 2017, slightly increasing this wave.

- ▼ 0.6kg, Wave 36
- ▼ 0.6kg, Wave 40



Recalled last spend

The average recalled last spend was **\$4.20**, which remains relatively consistent with the previous wave.

- ▼ \$3.60, Wave 36
- ▼ \$4.10, Wave 40



Value for money

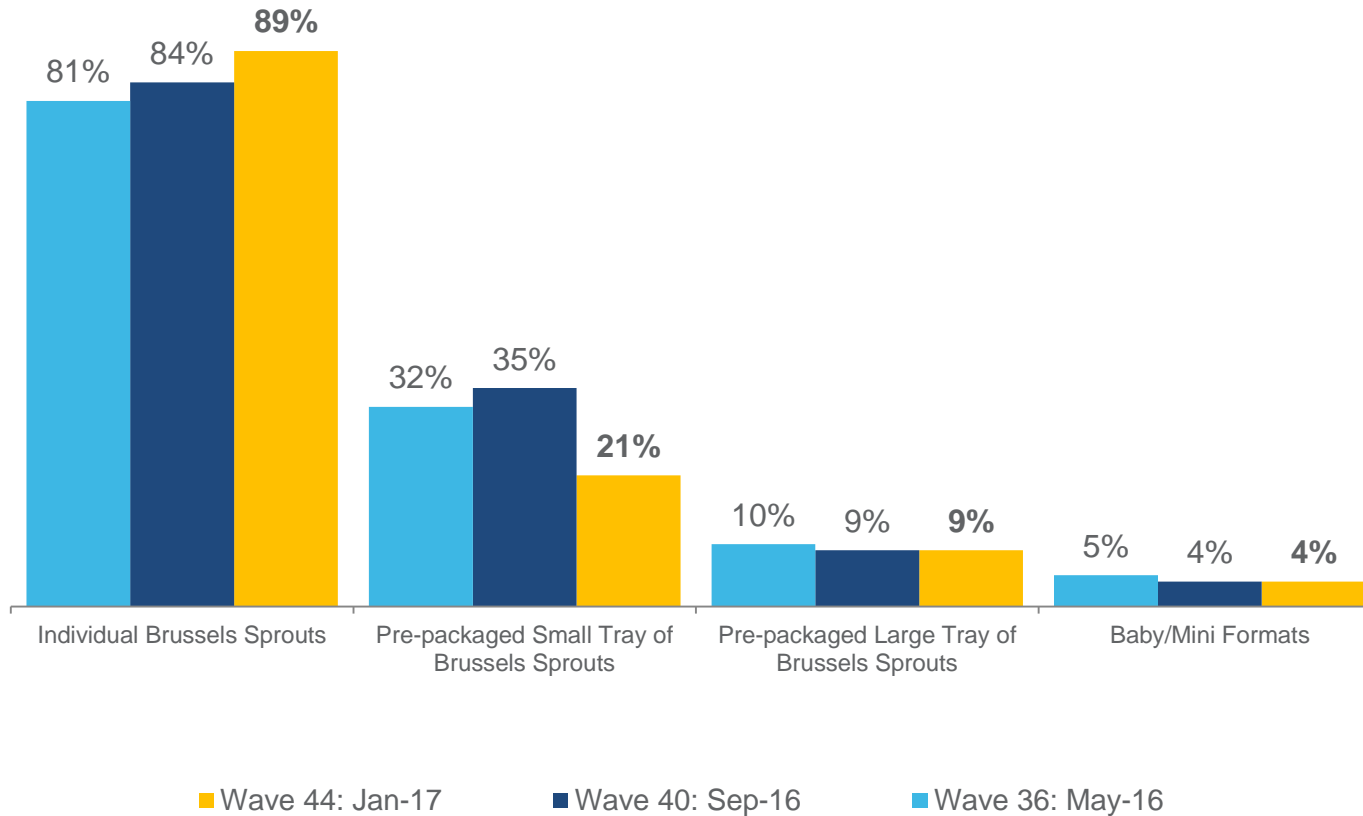
On average, consumers perceived Brussels sprouts to be relatively good value for money (**6.3/10**), which has decreased over the last three waves.

- ▲ 6.6/10, Wave 36
- ▲ 6.5/10, Wave 40

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 36 N=302, Wave 40 N=302, Wave 44 N=301



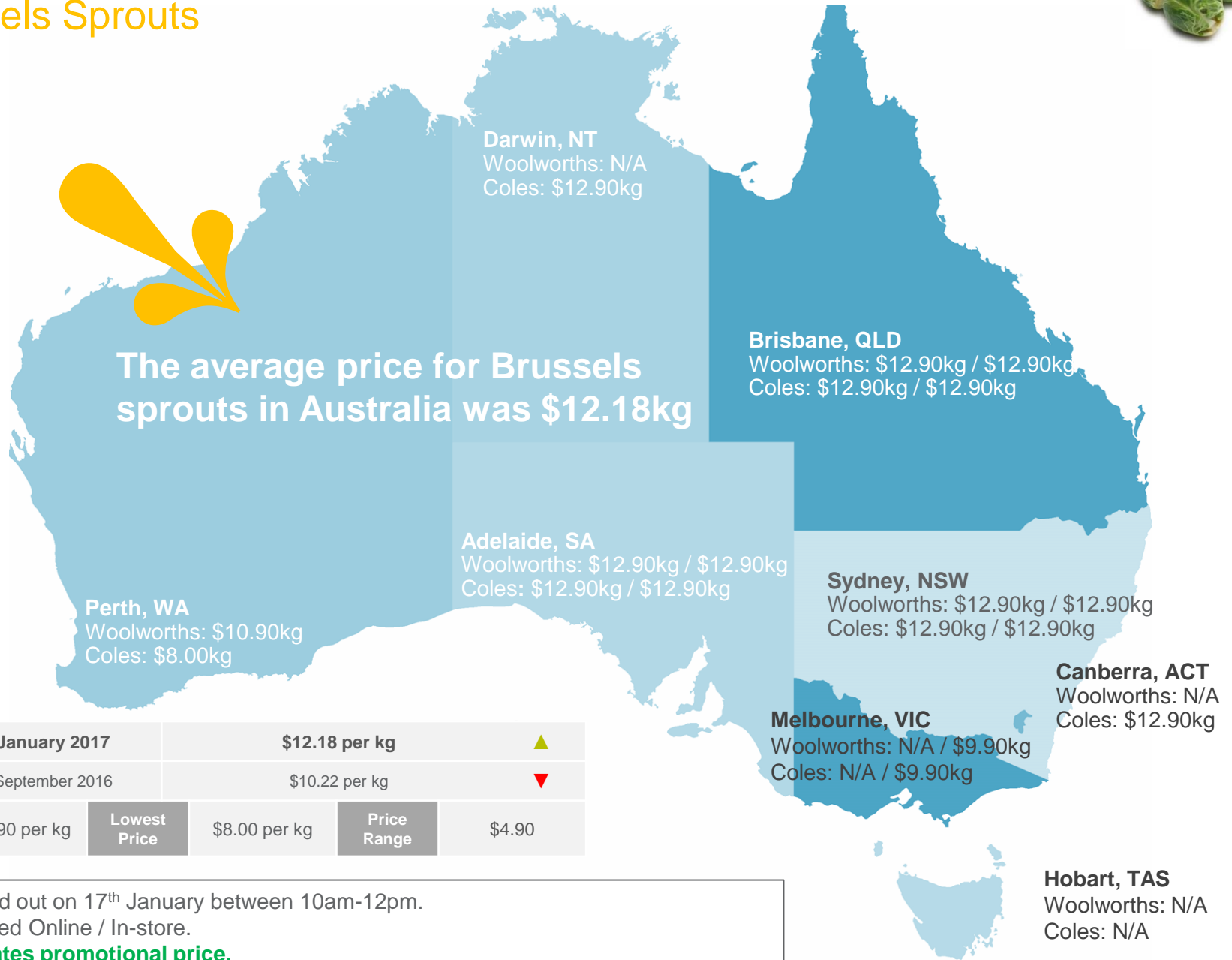
Individual Brussels sprouts were the main format purchased, consistent with previous waves. Purchase of pre-packaged small bags of Brussels sprouts has noticeably declined this wave.



Q4b. In what fresh formats do you typically purchase Brussels Sprouts?
Sample Wave 36 N=302, Wave 40 N=302, Wave 44 N=301

Online and In-store Commodity Prices

Brussels Sprouts



Average Price	January 2017	\$12.18 per kg ▲			
	September 2016	\$10.22 per kg ▼			
Highest Price	\$12.90 per kg	Lowest Price	\$8.00 per kg	Price Range	\$4.90

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



78% of consumers could not recall any type of Brussels sprouts.

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

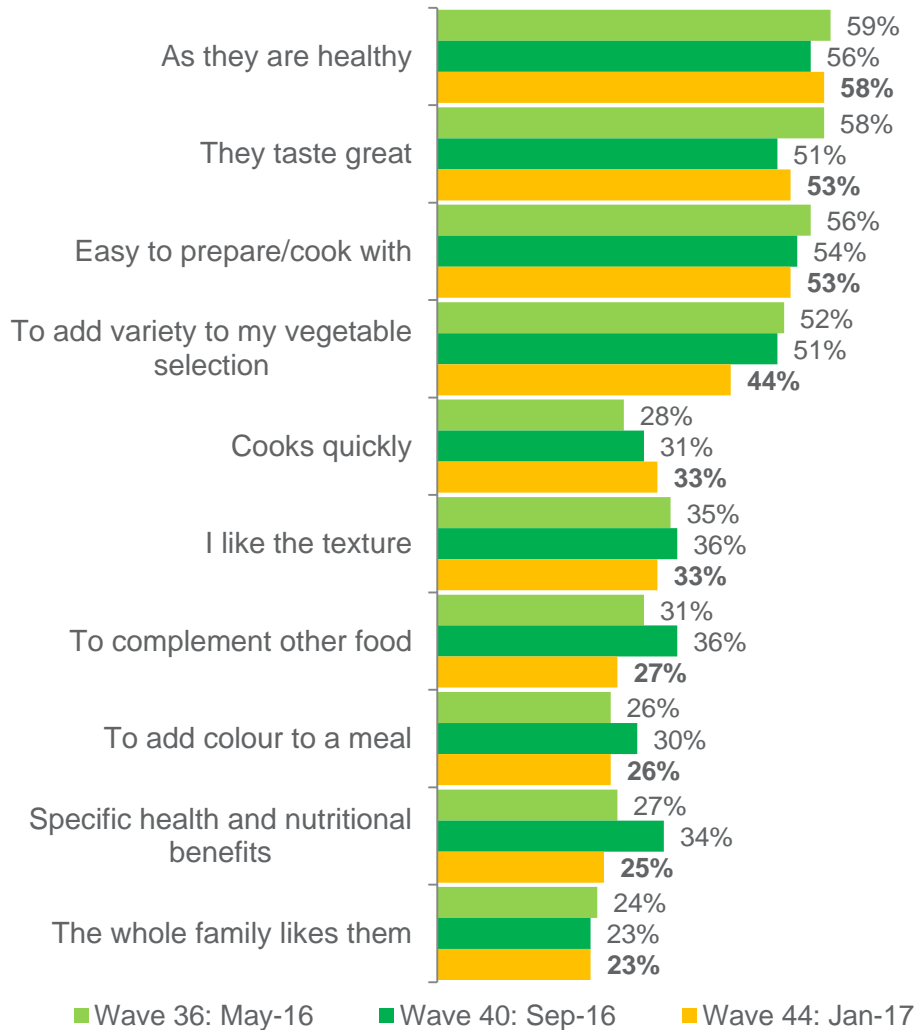




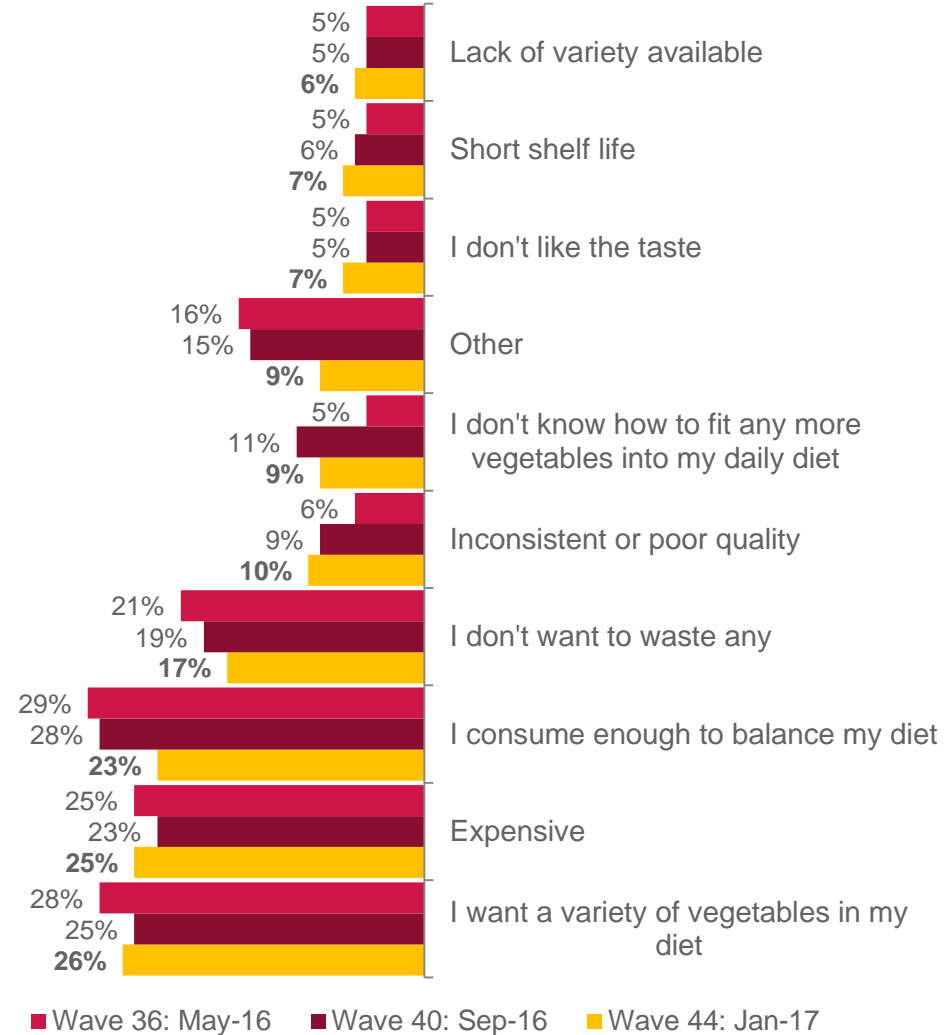
The main triggers for purchase are based around health and taste. In contrast, the barriers to purchase for consumers are wanting a variety of vegetables and price. Cooking quickly continues to increase as a reason to purchase Brussels sprouts.



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 36 N=302, Wave 40 N=302, Wave 44 N=301



Dinner was the main consumption occasion for Brussels sprouts.

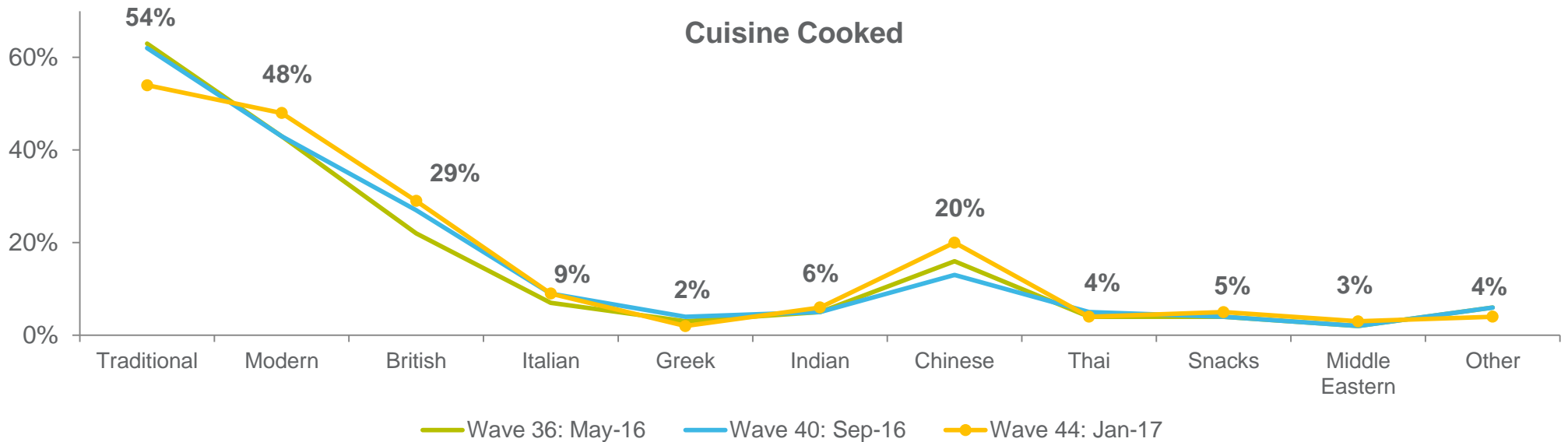
Traditional Australian cuisine remains the most common cooking style, with Chinese cuisine increasing this wave.

Top 5 Consumption Occasions

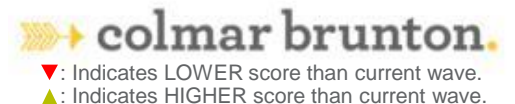
	Wave 40	Wave 44
Dinner	72%	64%
Family meals	60%	54%
Weekday meals	48%	39%
Weekend meals	39%	33%
Quick Meals	24%	29%

13%
used Brussels Sprouts when cooking a new recipe

▼ 9%, Wave 40

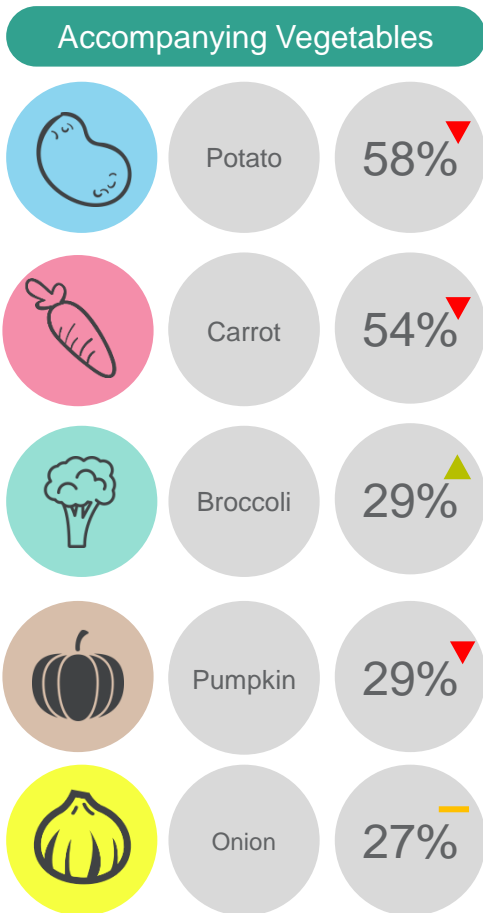


Q10. What cuisines do you cook/consume that use <commodity> ?
 Q11. Which of the following occasions do you typically consume/use <commodity> ?
 Sample Wave 36 N=302, Wave 40 N=302, Wave 44 N=301





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



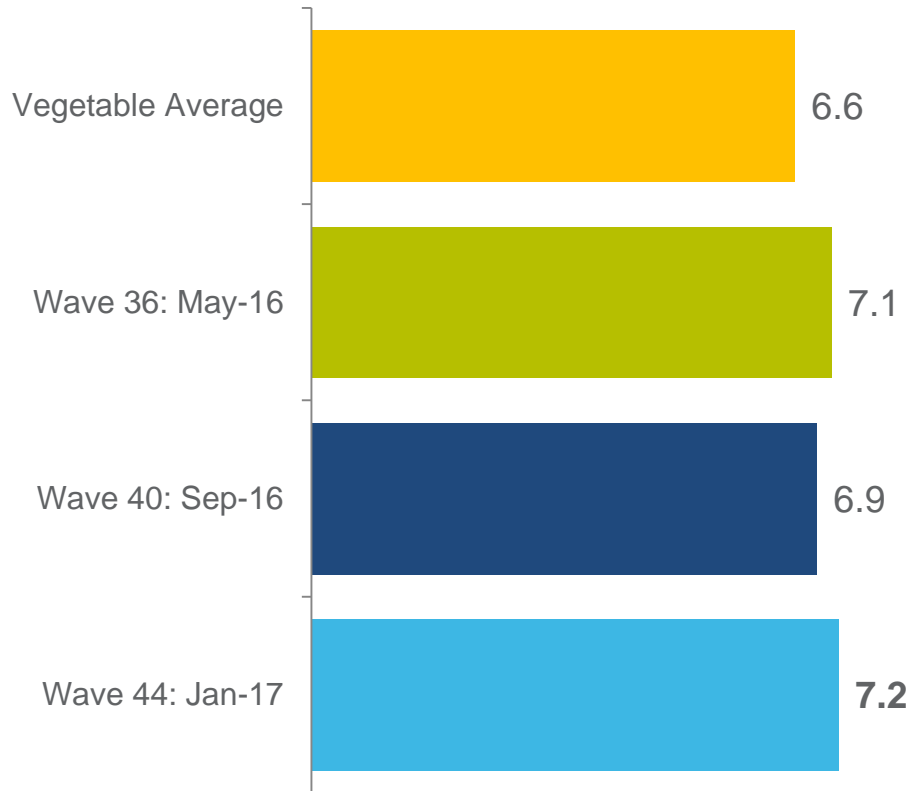
Top 10 Cooking Styles

	Wave 36	Wave 40	Wave 44
Steaming	55%	61%	53%
Boiling	40%	38%	42%
Stir frying	24%	25%	29%
Roasting	12%	12%	20%
Sautéing	16%	18%	19%
Microwave	20%	19%	15%
Frying	14%	14%	13%
Baking	7%	7%	11%
Soup	9%	8%	10%
Slow Cooking	10%	8%	8%

Q9. How do you typically cook <commodity> ?
 Q10a. And when are you serving <commodity> which of the following do you also serve together with this?
 Sample Wave 36 N=302, Wave 40 N=302, Wave 44 N=301



Importance of provenance has increased this wave. Consumers find it very important to know that Brussels sprouts are grown in Australia.



Q14. When purchasing <commodity>, how important is Provenance to you?
Mean scores out of 10.
Sample Wave 36 N=302, Wave 40 N=302, Wave 44 N=301

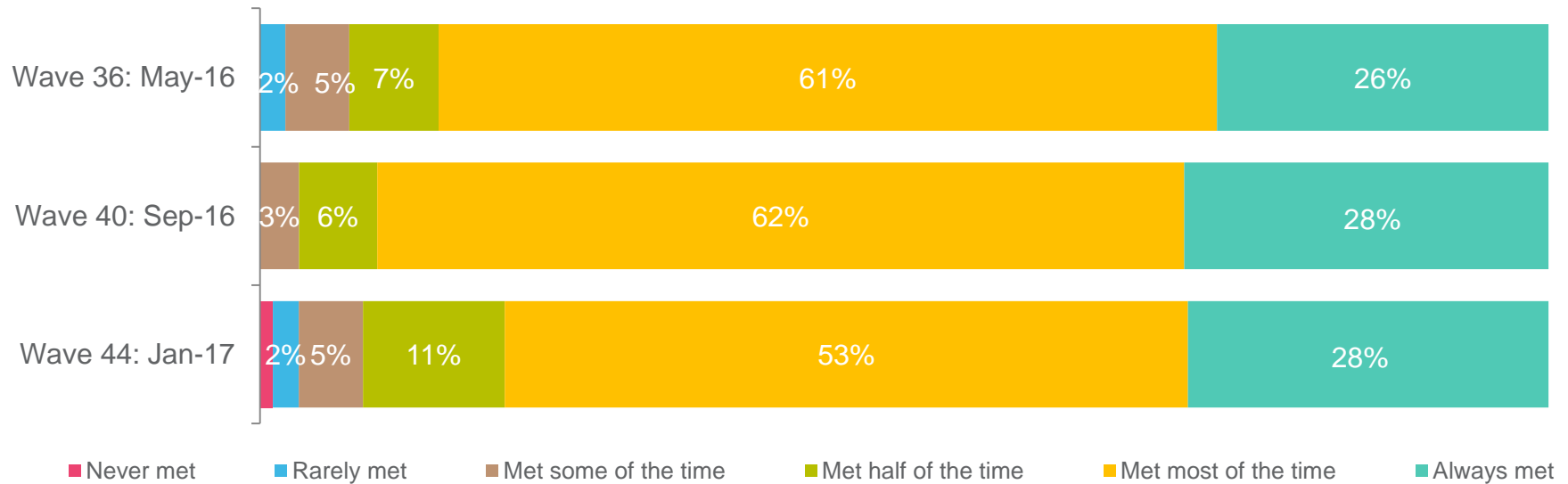


Consumers expect Brussels sprouts to stay fresh for nine days once purchased, with these expectations generally being met at least most of the time.

Expected to stay fresh for **9.2 days**

- 9.2 days, Wave 36
- 9.1 days, Wave 40

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 36 N=302, Wave 40 N=302, Wave 44 N=301



Trends: Brussels Sprouts

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



Innovative Brussels Sprouts Launches: L3M (October 2016 – January 2017)

Market Pantry Steam-in-Bag Whole Brussels Sprouts (USA)

Market Pantry Steam-in-Bag Whole Brussels Sprouts have been repackaged, and are now available in a newly designed 12-oz. pack. This ready-in-minutes product is an excellent source of vitamin C, contains no preservatives, and can be heated in the microwave.



Claims:
No Additives/Preservatives, Microwaveable

Ifa Eliges Vegetables for Soup (Spain)

Ifa Eliges Menestra de Verduras (Vegetables for Soup) are now available. The product is ready in 15 to 20 minutes, and retails in a 1kg pack, featuring cooking instructions.



Claims:
N/A

SmartMade Rosemary Grilled Beef & Vegetables (USA)

SmartMade Rosemary Grilled Beef & Vegetables comprises real grilled sirloin beef seasoned with rosemary served with roasted sweet potatoes, onions and Brussels sprouts. This USDA inspected microwaveable product is an excellent source of protein, contains no artificial flavors or colors and retails in a 9-oz. pack.



Claims:
No Additives/Preservatives, Microwaveable

Cottin Tavola Steamed Cabbage Trio (Italy)

Cottin Tavola Tris di Cavoli al Vapore (Steamed Cabbage Trio) contains no condiments or preservatives. This microwaveable product is ready in one minute and retails in a 250g pack.



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



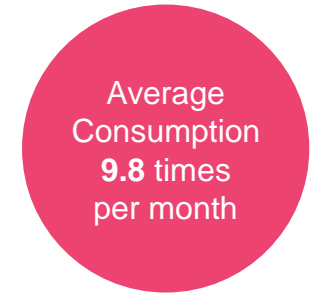
Spinach.



On average, spinach is purchased five times per month, and is consumed ten times per month, relatively consistent with the previous wave. Spinach is predominantly purchased through mainstream retailers.

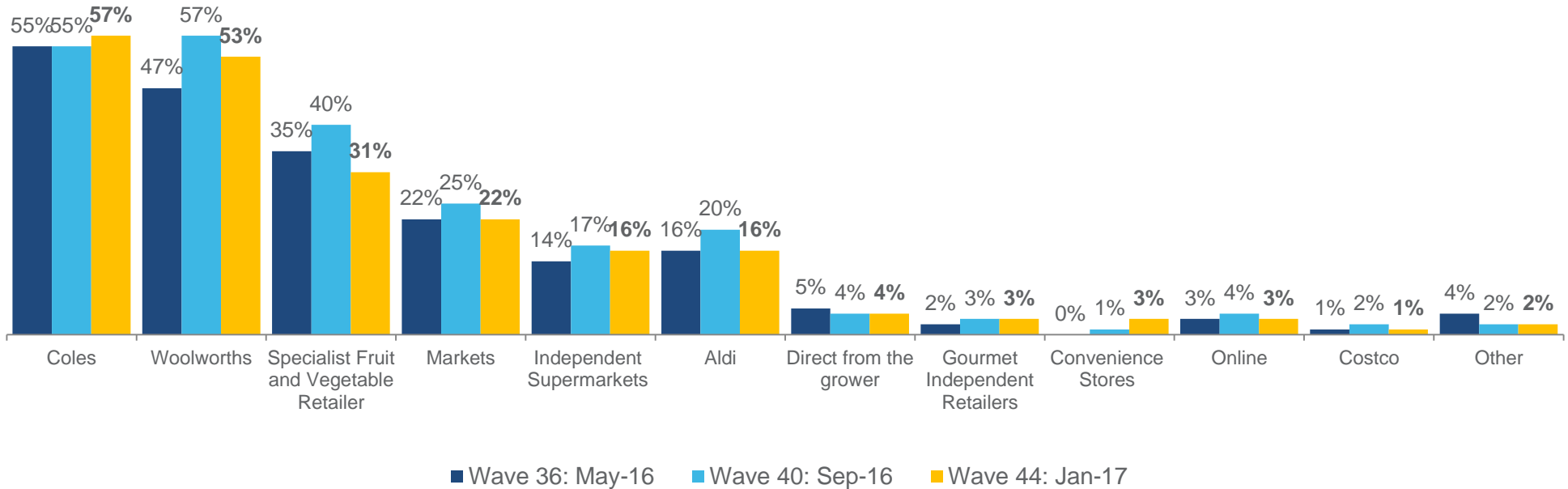


- ▼ 4.3 times, Wave 36
- ▼ 4.7 times, Wave 40



- ▼ 9.5 times, Wave 36
- ▲ 10.0 times, Wave 40

Purchase Channels



Q1. On average, how often do you purchase Spinach (English and baby)?
 Q2. On average, how often do you consume Spinach (English and baby)?
 Q5. From which of the following channels do you typically purchase Spinach (English and baby)?
 Sample Wave 36 N=300, Wave 40 N=303, Wave 44 N=301



Average Spend and Price Sensitivity



Average weight of purchase

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

- 0.5kg, Wave 36
- 0.5kg, Wave 40



Recalled last spend

Recalled last spend on spinach is **\$4.00**, which has slightly increased this wave.

- ▼ \$3.40, Wave 36
- ▼ \$3.90, Wave 40



Value for money

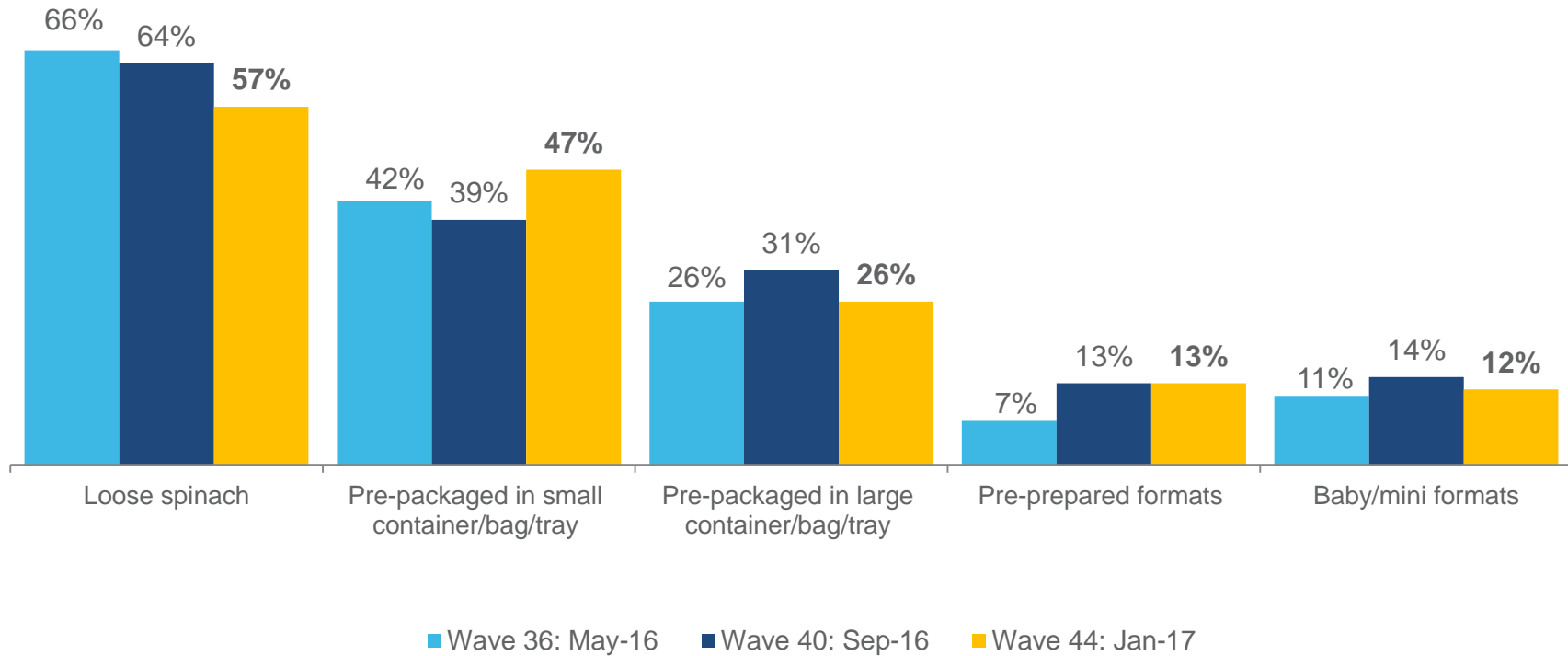
Consumers perceive spinach to be good value for money (**6.5/10**), which remains relatively consistent with the previous wave.

- ▲ 6.8/10, Wave 36
- ▲ 6.6/10, Wave 40

Q3. How much Spinach do you typically purchase when you shop for it?
 Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
 Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
 Sample Wave 36 N=300, Wave 40 N=303, Wave 44 N=301



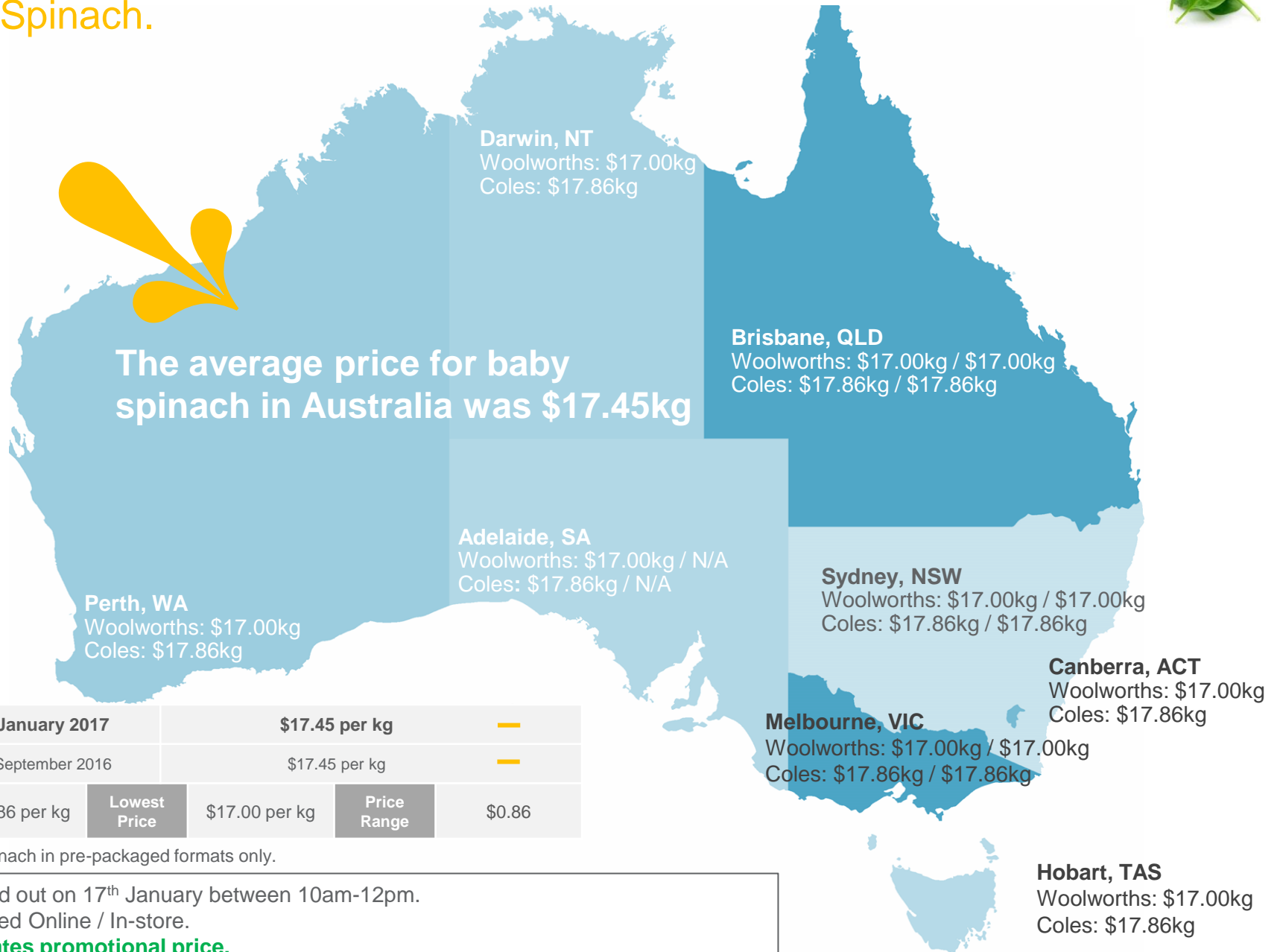
Loose spinach and pre-packaged small bags are the most common purchase formats. Coles has stopped selling loose spinach, which has resulted in increased purchase of pre-packaged small bags.



Q4b. In what fresh formats do you typically purchase Spinach (English and baby)?
Sample Wave 36 N=300, Wave 40 N=303, Wave 44 N=301

Online and In-store Commodity Prices

Baby Spinach.



Average Price	January 2017	\$17.45 per kg		—	
	September 2016	\$17.45 per kg		—	
Highest Price	\$17.86 per kg	Lowest Price	\$17.00 per kg	Price Range	\$0.86

Coles sold baby spinach in pre-packaged formats only.

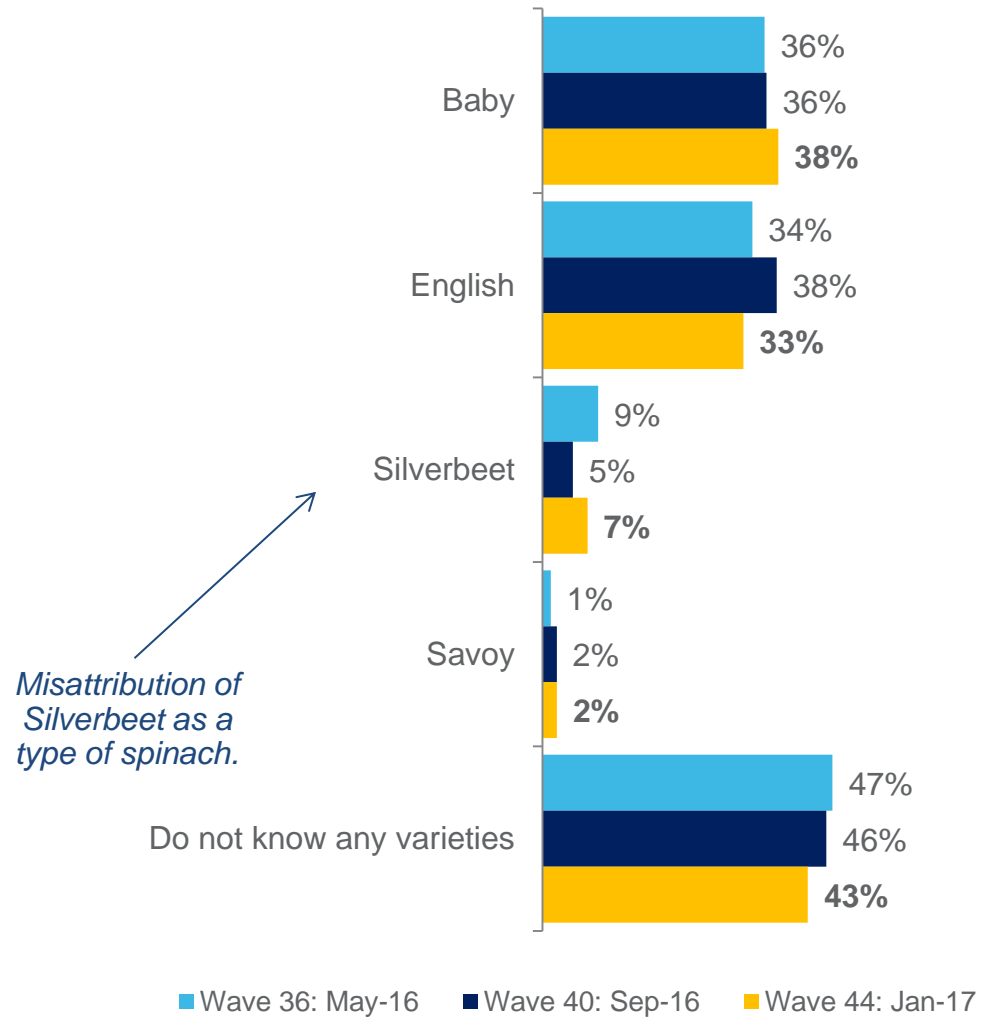
Pricing was carried out on 17th January between 10am-12pm.
Prices are displayed Online / In-store.

Green text indicates promotional price.



Baby and English were the most commonly recalled types of spinach.

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

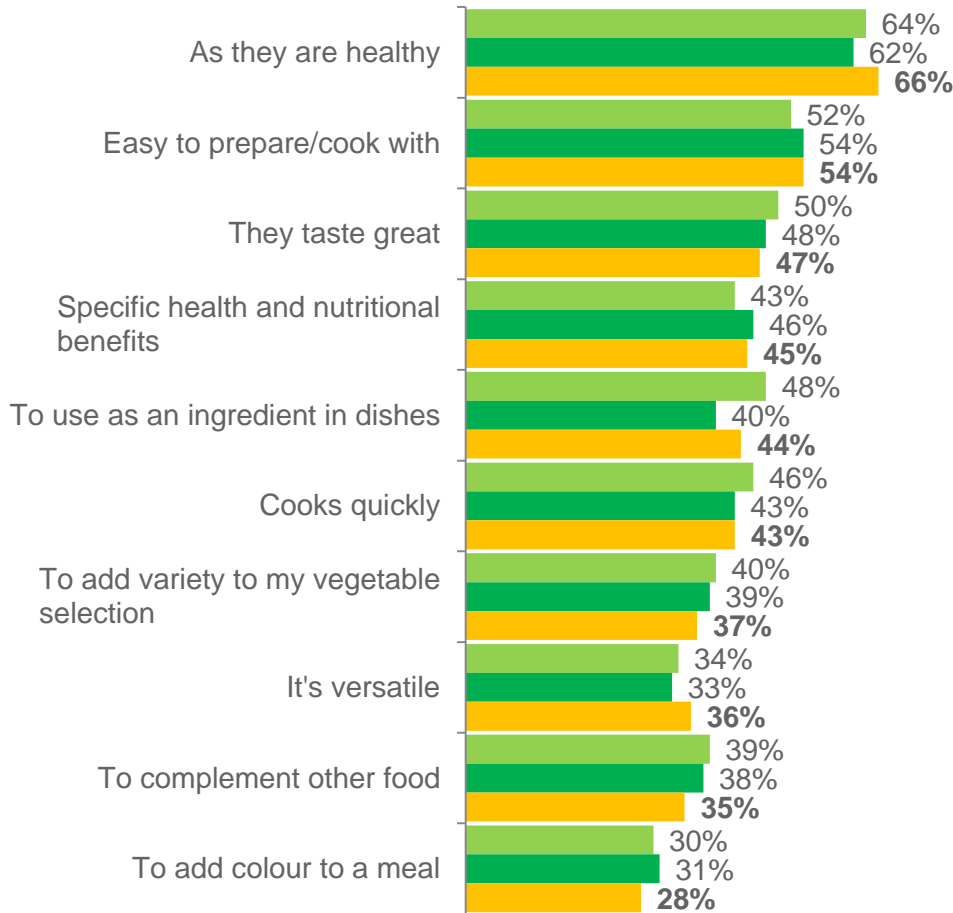


Q6a. What varieties of Spinach are you aware of? (unprompted)
Sample Wave 36 N=300, Wave 40 N=303, Wave 44 N=301



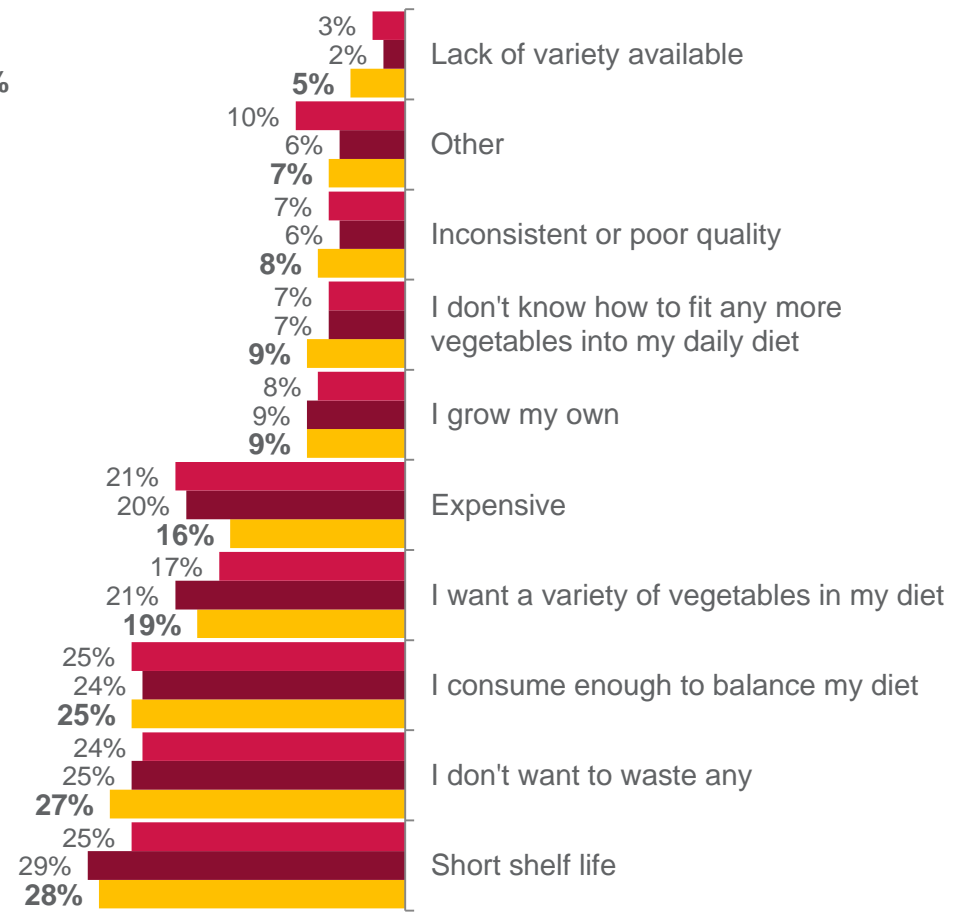
The key drivers of purchase for spinach are related to health, ease of preparation and taste. In contrast, short shelf life and not wanting to waste any are the key barriers to purchase.

Triggers



■ Wave 36: May-16 ■ Wave 40: Sep-16 ■ Wave 44: Jan-17

Barriers



■ Wave 36: May-16 ■ Wave 40: Sep-16 ■ Wave 44: Jan-17

Q7. Which of the following reasons best describes why you purchase Spinach (English and baby)?
Q8. Which reason best describes why you don't buy Spinach (English and baby) more often?
Sample Wave 36 N=300, Wave 40 N=303, Wave 44 N=301



Top 5 Consumption Occasions

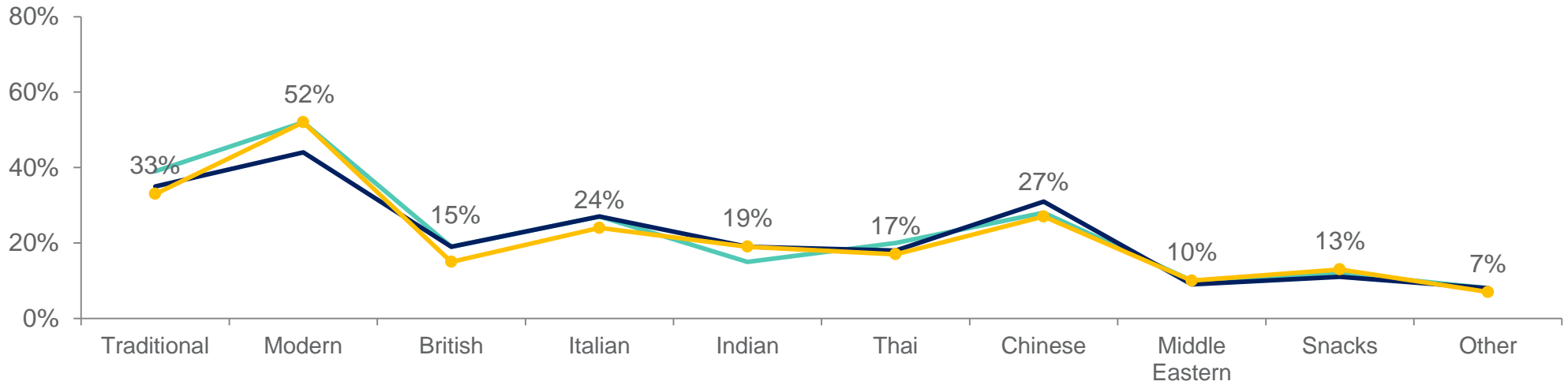
Australian, Chinese and Italian cuisines are popular for spinach dishes. Consistent with the past wave, meal occasions tend to occur during dinner.

	Wave 40	Wave 44
Dinner	66%	67%
Quick Meals	43%	50%
Family meals	53%	49%
Weekday meals	48%	43%
Lunch	44%	41%

25%
used spinach when cooking a new recipe

▼ 17%, Wave 40

Typical Cuisine Cooked



— Wave 36: May-16 — Wave 40: Sep-16 — Wave 44: Jan-17

← Australian → European → Asian → Other Cuisines →

Q10. What cuisines do you cook/consume that use Spinach (English and baby)?
Q11. Which of the following occasions do you typically consume/use Spinach (English and baby)?
Sample Wave 36 N=300, Wave 40 N=303, Wave 44 N=301

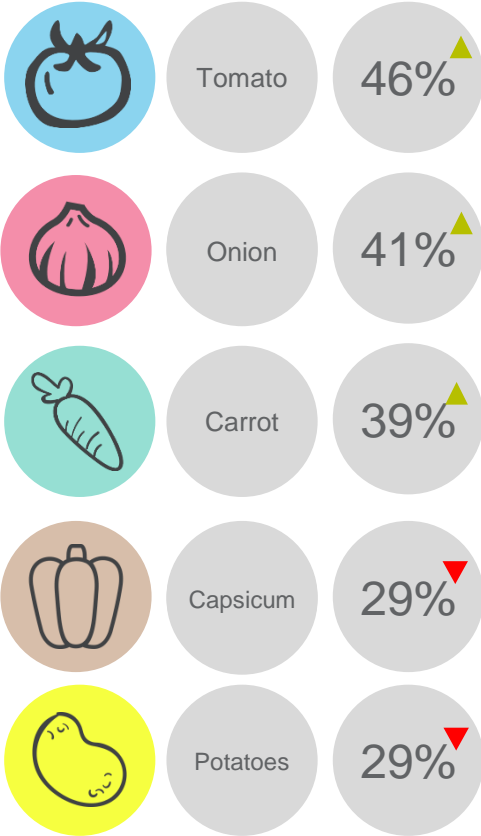


▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.



Consumers prefer to use spinach mainly with tomatoes, onions and carrots. Spinach is generally eaten raw or stir fried, consistent with previous waves.

Accompanying Vegetables

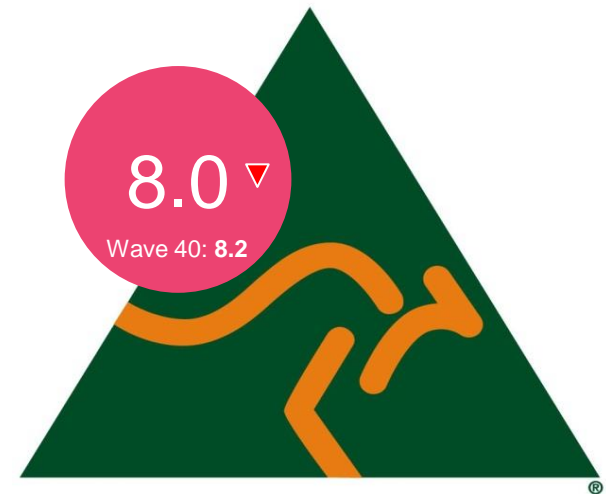
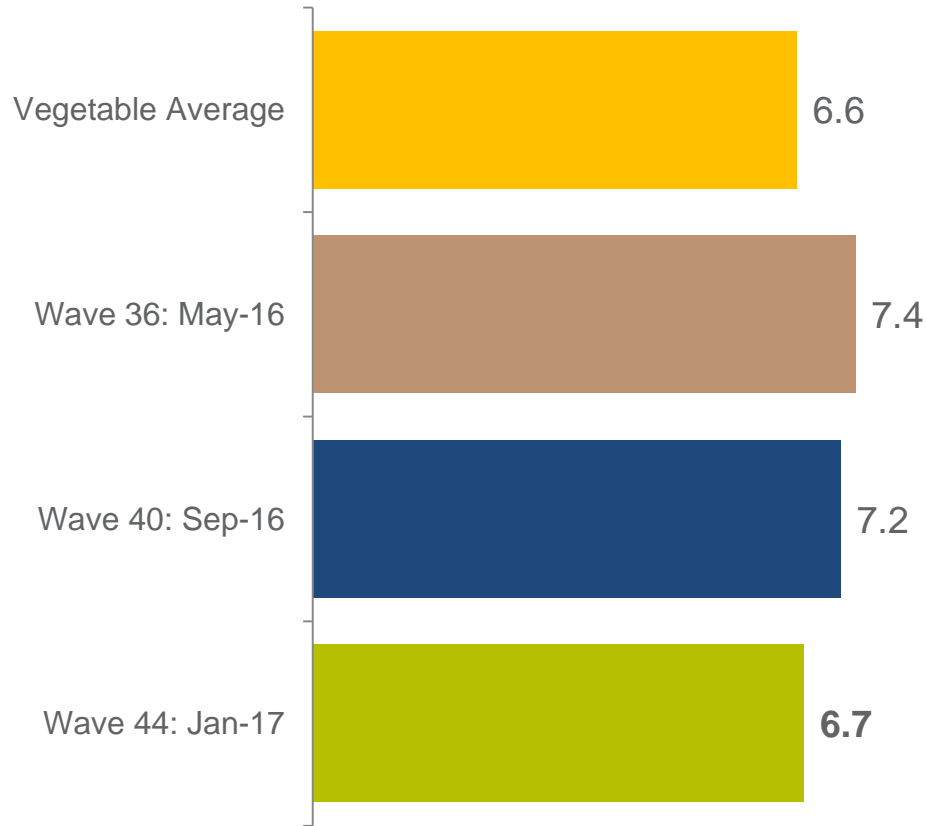


Top 10 Cooking Styles			
	Wave 36	Wave 40	Wave 44
Raw	41%	51%	46%
Stir frying	47%	48%	46%
Steaming	40%	37%	37%
Sautéing	27%	29%	25%
Boiling	18%	20%	20%
Soup	19%	21%	18%
Frying	13%	12%	11%
Slow Cooking	10%	10%	10%
Baking	7%	13%	10%
Microwave	9%	8%	7%

Q9. How do you typically cook Spinach (English and baby)?
Q10a. And when are you serving Spinach (English and baby) which of the following do you also serve together with this?
Sample Wave 36 N=300, Wave 40 N=303, Wave 44 N=301



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



Q14. When purchasing Spinach (English and baby), how important is Provenance to you?
Q15. And when purchasing Spinach (English and baby), how important is that it is grown in Australia?
Sample Wave 36 N=300, Wave 40 N=303, Wave 44 N=301

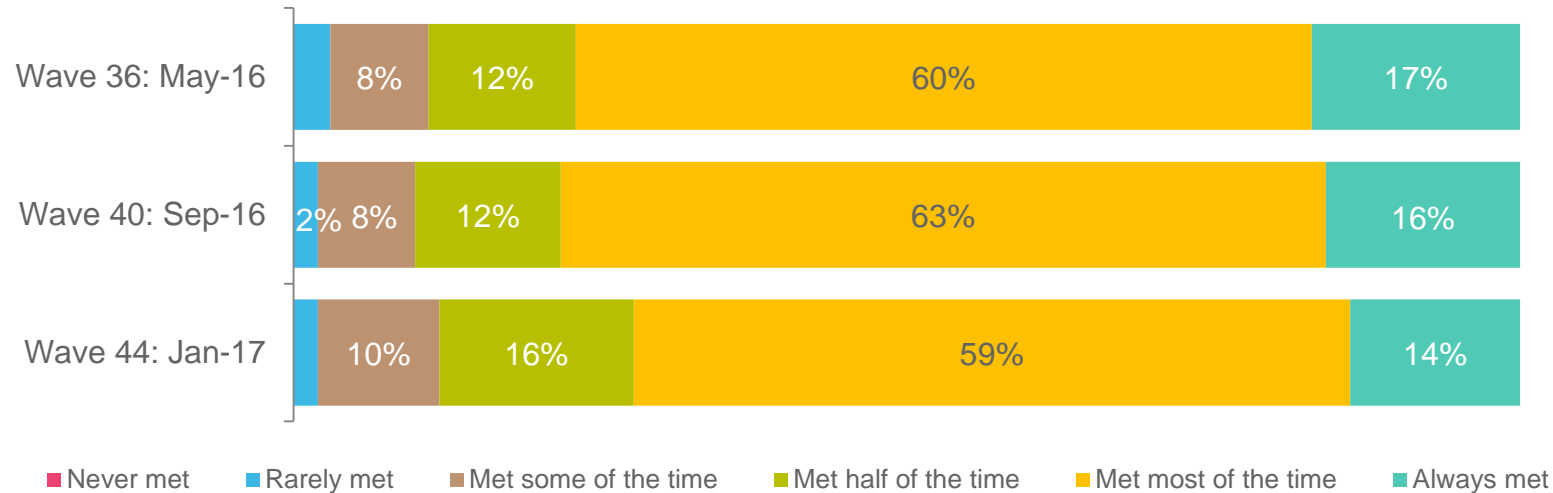


Consumers expect spinach to remain fresh for just under a week once purchased. Freshness expectations have marginally declined over the last three waves, but are still being met at least most of the time.

Expected to stay fresh for 6.0 days

- ▲ 6.4 times, Wave 36
- ▲ 6.1 times, Wave 40

Expectations Met



Q12. How long do you expect Spinach (English and baby) to stay fresh for, once you have purchased it?
 Q13. How often is this length of freshness met when you buy Spinach (English and baby)?
 Sample Wave 36 N=300, Wave 40 N=303, Wave 44 N=301

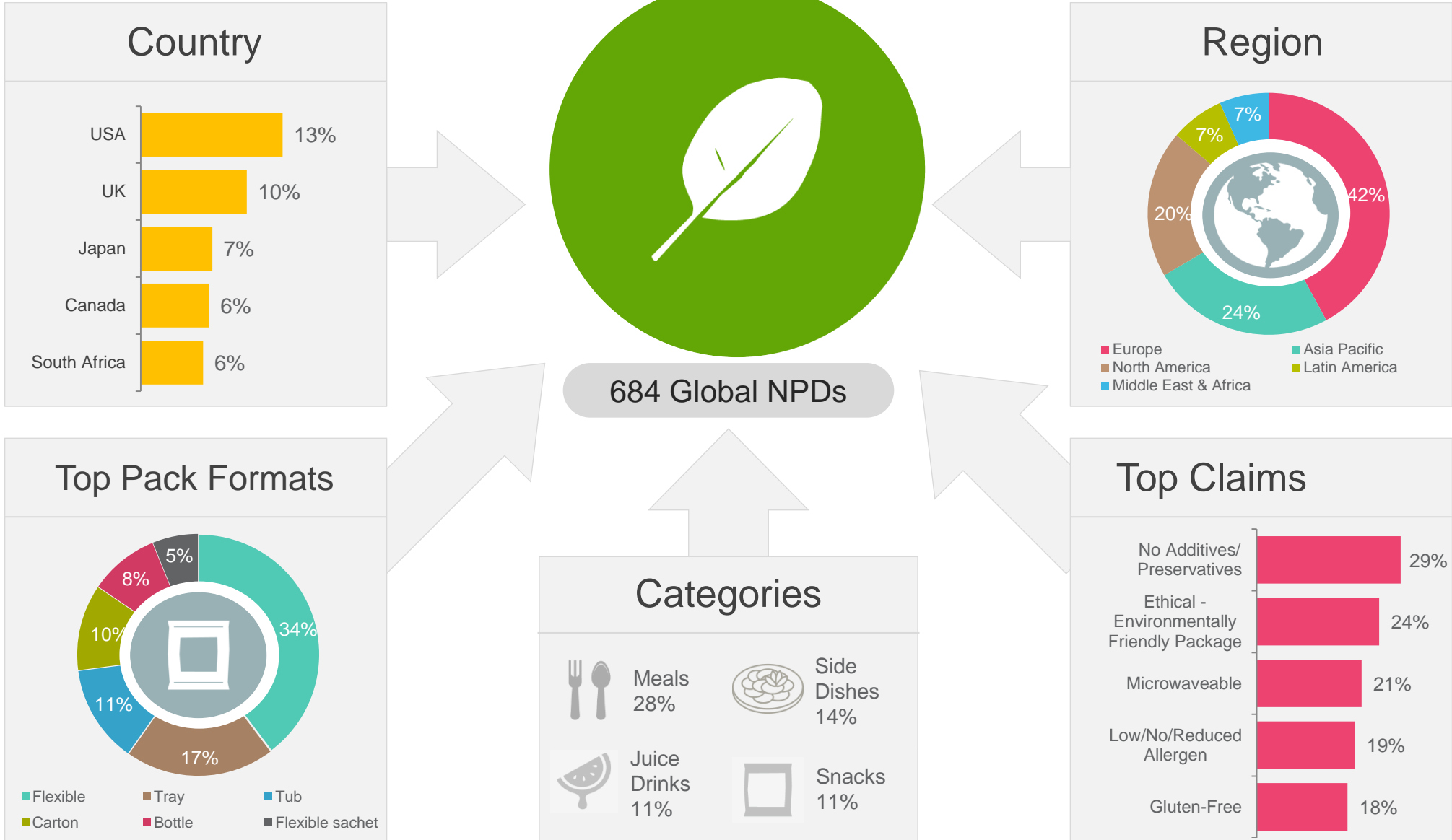
A close-up photograph of vibrant green spinach leaves, showing their characteristic crinkled texture and bright color. The leaves are densely packed and fill the entire background of the slide.

Spinach Product Launch Trends.

Spinach Global Launches

October 2016 – January 2017

There were 684 spinach products launched globally over the last three months. The majority of launches were in USA and the UK. Categories for launches were meals and side dishes. Key packaging for spinach products were flexible packaging and trays.





Spinach Product Launches: Last 3 Months (October 2016 – January 2017) Summary

- There were 684 launches in the past 3 months globally that contained spinach as an ingredient.
- There were 20 products launched in Australia over the past three months.
- Europe (42%) and Asia Pacific (24%) were the key regions for launches.
- Flexible packaging (34%) and trays (17%) were the most common formats utilised.
- The main categories for launches were meals (28%), side dishes (14%), juice drinks (11%) and snacks (11%).
- Most popular claims on products included no additives/preservatives (29%) and ethical & environmentally friendly packaging (24%).
- The most innovative product launched was Spinach Cheese Dumplings from Germany. Examples of these can be found in the following pages.

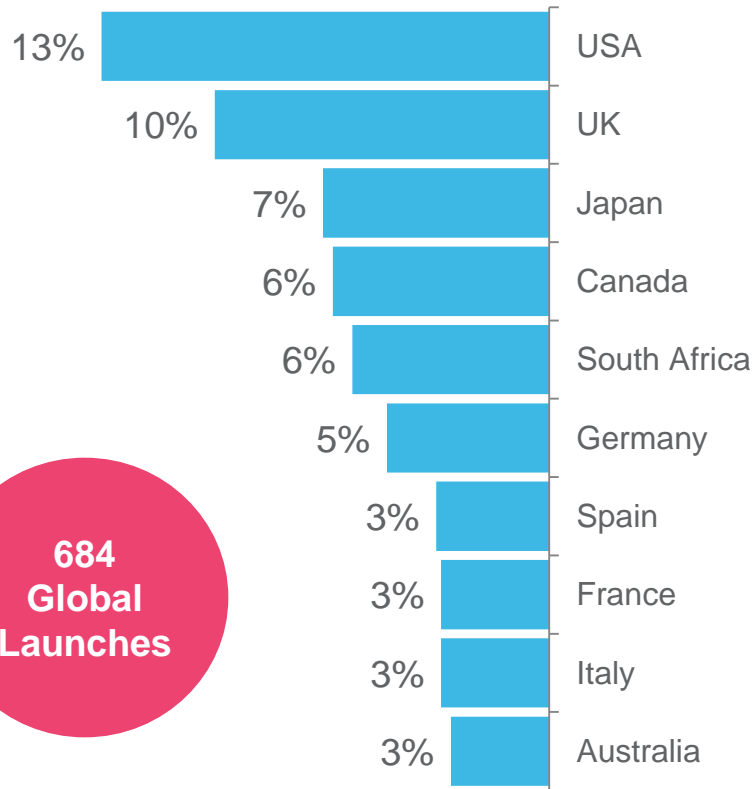


Source: Mintel (2016)

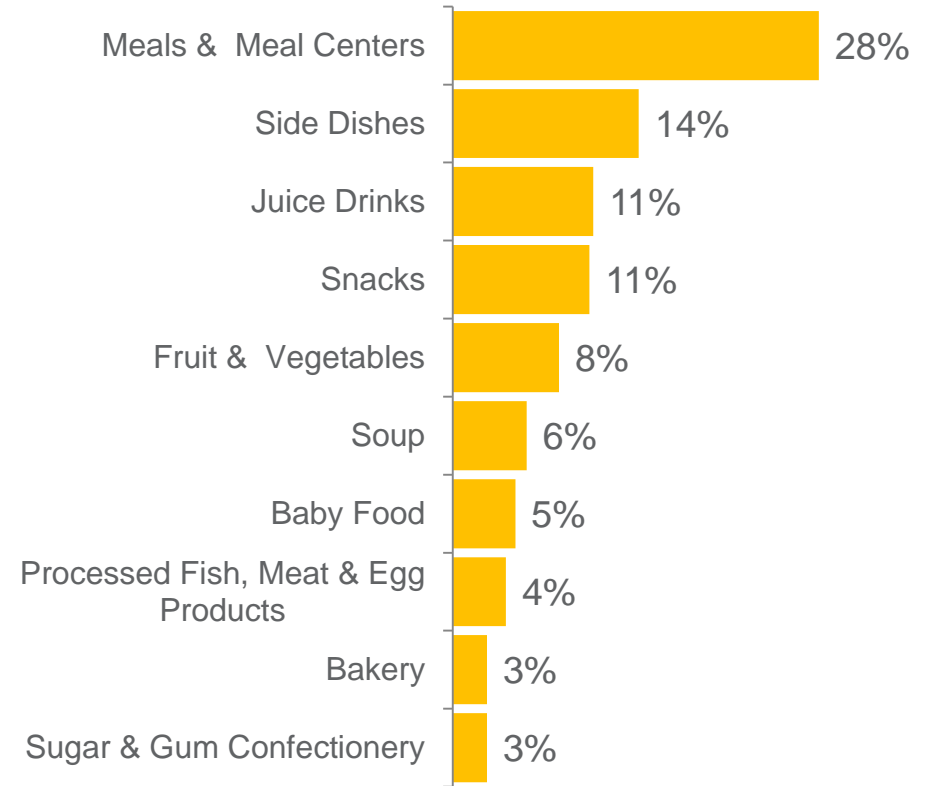


The majority of spinach launches occurred in USA and the UK, consistent with previous waves. The key categories for spinach launches are meals, side dishes, and juice drinks.

Top Launch Countries



Top Launch Categories












684
Global
Launches












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

Flexible packaging and trays are primarily used for spinach products.

Pack Formats Used

Global		Flexible	34%
		Tray	17%
		Tub	11%
Europe		Flexible	32%
		Tray	20%
		Carton	13%
Asia Pacific		Flexible	33%
		Tray	17%
		Carton	11%

Top Claims Used

Global		No Additives/Preservatives	29%
		Ethical - Environmentally Friendly Package	24%
		Microwaveable	21%
Europe		Ethical - Environmentally Friendly Package	24%
		No Additives/Preservatives	19%
		Vegetarian	18%
Asia Pacific		No Additives/Preservatives	38%
		Microwaveable	28%
		Ethical - Environmentally Friendly Package	20%

Only regions with n >30 are displayed



Innovative Spinach Launches: L3M (October 2016 – January 2017)

Redubío Detox Apple, Orange, Blueberry, Spinach, Cauliflower, Parsley and Ginger Drink Mix (Brazil)

Redubío Detox Pó para Preparo de Bebida de Maçã, Laranja, Blueberry, Espinafre, Couve, Salsa e Gengibre (Apple, Orange, Blueberry, Spinach, Kale, Parsley and Ginger Drink Mix) is low in sodium and helps maintain the balance and equilibrium of the body. The product contains only 49kcal, nature identical flavoring and sugar from the ingredients. It retails in a recyclable 300g pack.



Claims:
Low/No/Reduced Calorie, Other (Functional), Low/No/Reduced Sodium, Digestive (Functional), Ethical - Environmentally Friendly Package

En Bedre Levevis Organic Whole Leaf Spinach (Denmark)

En Bedre Levevis Økologisk Helbladet Spinat (Organic Whole Leaf Spinach) is described as an easy alternative to fresh spinach. The blanched product is hand picked in China, it is microwavable, and retails in a 400g pack bearing the Green Keyhole and EU Green Leaf logos.



Claims:
Microwaveable, Organic, Ease of Use

The Strand Super Duper Chicken, Bean & Rice Salad (UK)

The Strand Super Duper Chicken, Bean & Rice Salad comprises bar marked chicken breast with a spicy bean mix, salanova, spinach, creme fraiche and jalapeno peppers. The product retails in a 240g pack.



Claims:
N/A

Western Family Spinach Wraps (Canada)

Western Family Spinach Wraps have been repackaged. The large size product can be used to prepare quesadilla, burrito or wrap style meal, and is microwavable. This wrap retails in a 568g resealable pack containing eight units and featuring a recipe suggestion.



Claims:
Microwaveable, Convenient Packaging



Innovative Spinach Launches: L3M (October 2016 – January 2017)

Biopont Organic Spinach & Leek Flavoured Rice Balls (Poland)

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



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

Novelle Spinach and Garlic Tortellini (Poland)

Novelle Makaron Tortellini z Nadzieniem ze Szpinaku z Dodatkiem Czosnku (Spinach and Garlic Tortellini) is now available. The preservative-free product retails in a 250g pack.



Claims:
No Additives/Preservatives

Uni-President Natural Organic Frozen Spinach (Taiwan)

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



Claims:
Organic, Ease of Use

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 Fiuli 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 Spinach Launches: L3M (October 2016 – January 2017)

Jumbo Jamie Oliver 'Amazing' Fennel Dish (Netherlands)

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



Claims:
N/A

Omis Schnelle Küche Spinach Cheese Dumplings (Germany)

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



Claims:
Microwaveable, Time/Speed

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

Snowcrest Boom! Energy Kick Smoothie Fast Pack (Canada)

Snowcrest Boom! Energy Kick Smoothie Fast Pack comprises blueberries, raspberries, bananas, green chickpeas and spinach; and is described as the perfect balance of fruit and vegetables. It is prepared with only 100% fresh frozen pre-mixed fruits and vegetables with no added sugar or preservatives. It is an energizing blend of plant based protein, is a good source of vitamin C and iron, and is a high source of fibre.



Claims:
No Additives/Preservatives, High/Added Fiber, Low/No/Reduced Sugar, Time/Speed, Ease of Use, Social Media



Australian Spinach Launches: L3M (October 2016 – January 2017)

Greco's Ultrablast Cacao Superfood Breakfast



Bellamy's Organic Chicken, Sweet Potato & Cous Cous



Proud & Punch Paging Dr. Green Frozen Juice Pops



Edgell Chick Pea Salad



Yumi's Deli Range Mushroom, Spinach & Thyme Pesto



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





Parsnip.



This wave sees both an increase in purchase and consumption frequency of parsnip.

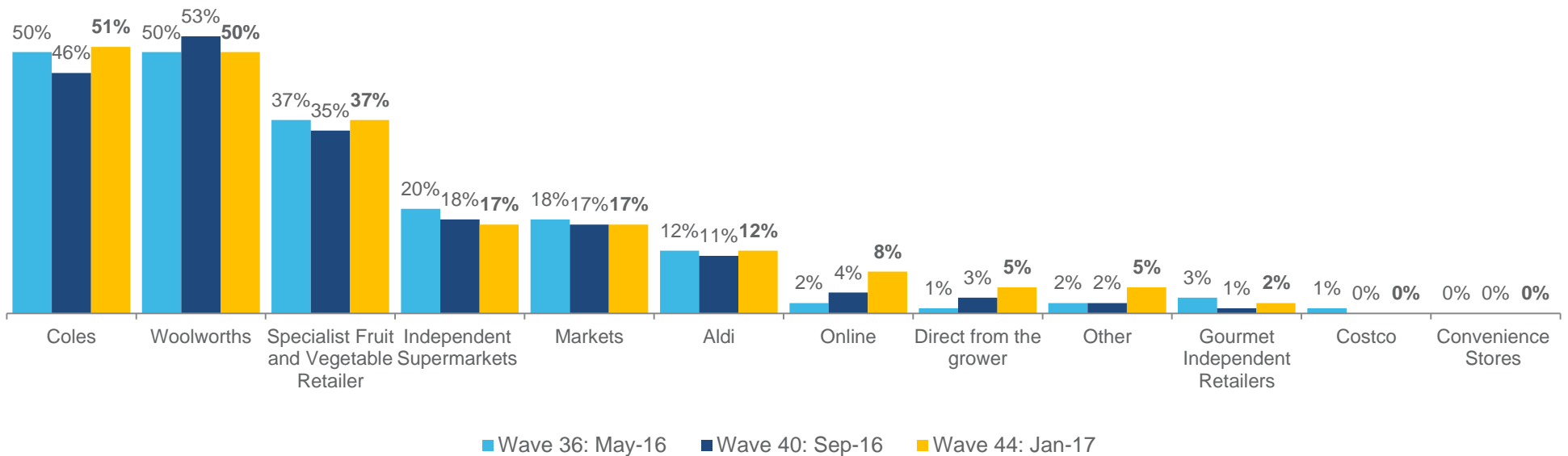
Purchase of parsnips is predominantly through mainstream retailers and specialist vegetable retailers.



▲ 3.1 times, Wave 36
▼ 2.3 times, Wave 40

▼ 4.5 times, Wave 36
▼ 4.7 times, Wave 40

Purchase Channels



Q1. On average, how often do you purchase Parsnips?
 Q2. On average, how often do you consume Parsnips?
 Q5. From which of the following channels do you typically purchase Parsnips?
 Sample Wave 36 N=202, Wave 40 N=201, Wave 44 N=202



Average Spend and Price Sensitivity.



Average weight of purchase

The average consumer typically purchases **800g** of parsnip, declining over the last three waves.

- 800g, Wave 36
- ▼ 700g, Wave 40



Recalled last spend

Recalled last spend on parsnips was **\$4.20**, which has increased in January 2017.

- ▼ \$3.90, Wave 36
- ▼ \$3.60, Wave 40



Value for money

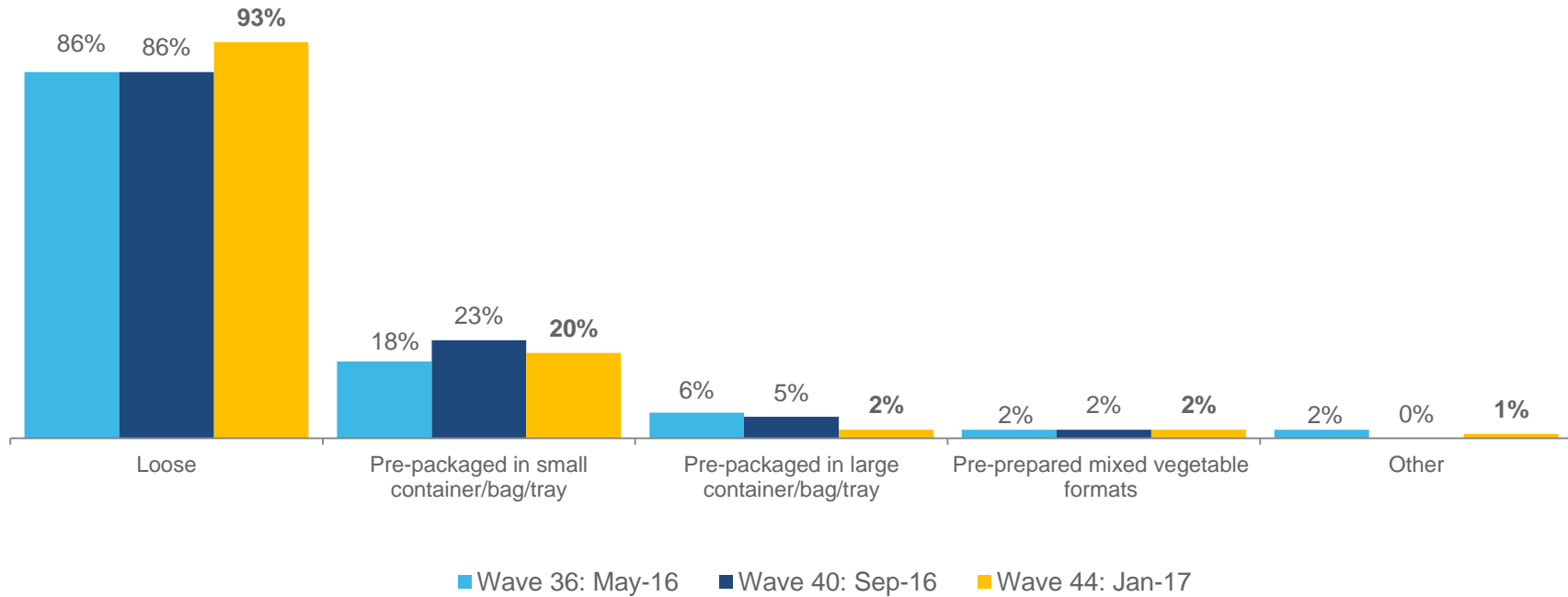
Consumers' perceived value for money is fair for parsnips (**5.6/10**), relatively consistent with past waves.

- ▼ 5.5/10, Wave 36
- ▲ 5.7/10, Wave 40

Q3. How much Parsnip do you typically purchase when you shop for it?
 Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
 Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
 Sample Wave 36 N=202, Wave 40 N=201, Wave 44 N=202



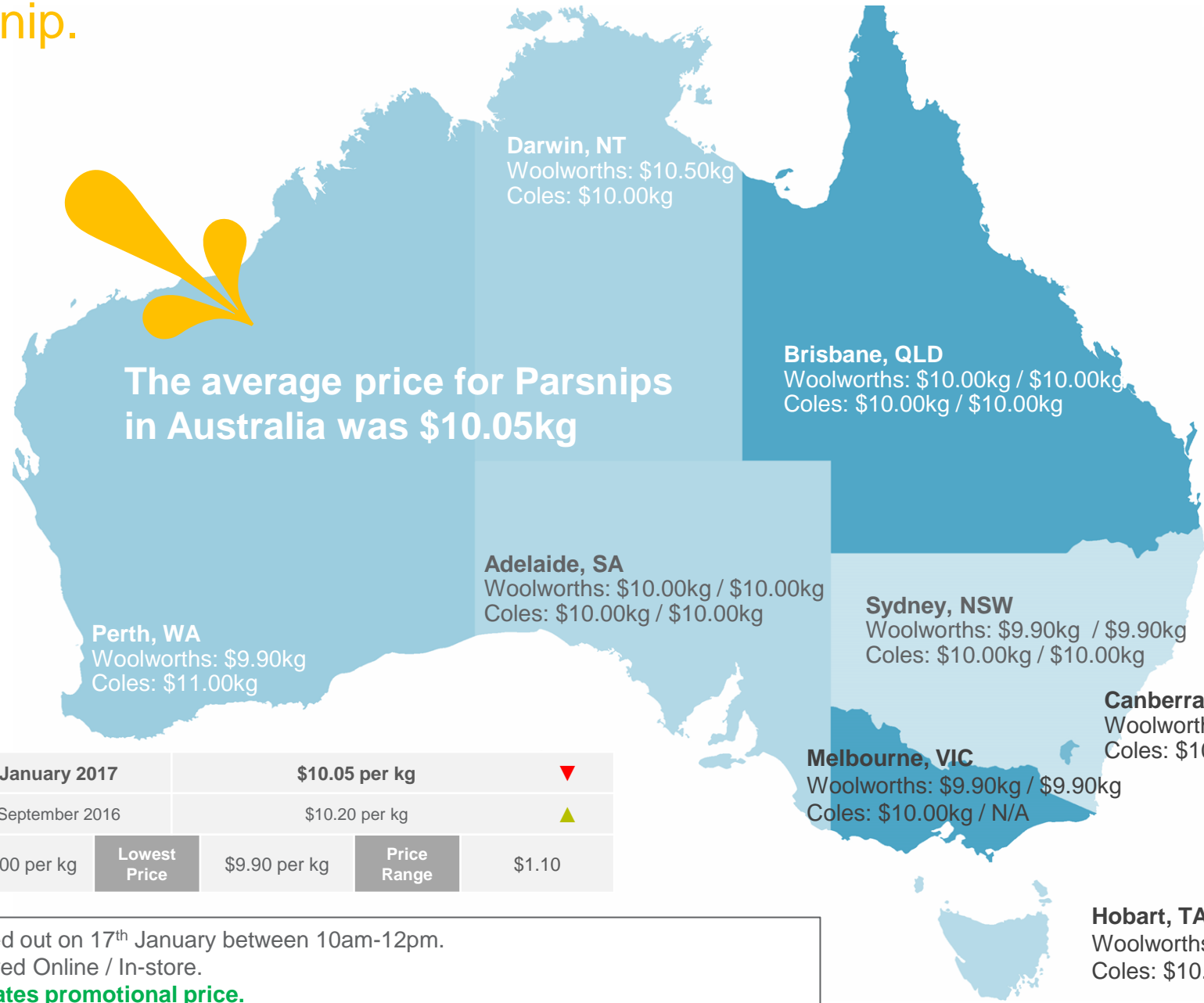
Individual parsnips remain the most common purchase format, consistent with past waves.



Q4b. In what fresh formats do you typically purchase Parsnips?
Sample Wave 36 N=202, Wave 40 N=201, Wave 44 N=202

Online and In-store Commodity Prices

Parsnip.



Average Price	January 2017	\$10.05 per kg ▼			
	September 2016	\$10.20 per kg ▲			
Highest Price	\$11.00 per kg	Lowest Price	\$9.90 per kg	Price Range	\$1.10

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



Awareness of parsnip varieties is low, with four in five (80%) consumers unable to recall a type.

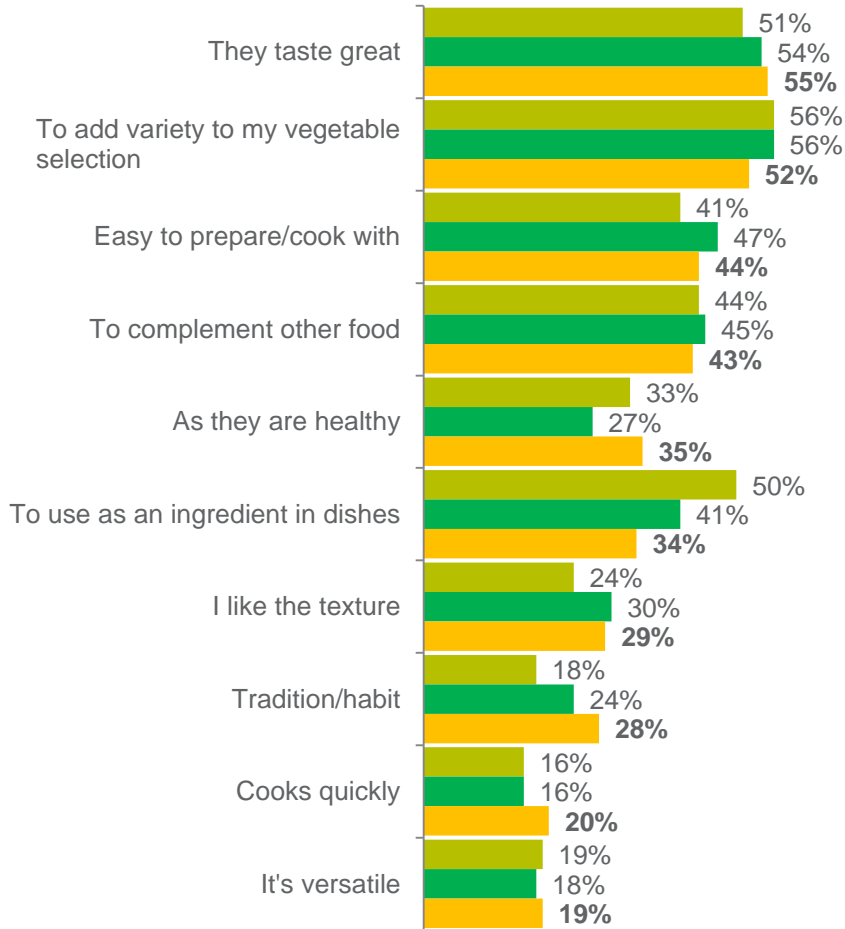




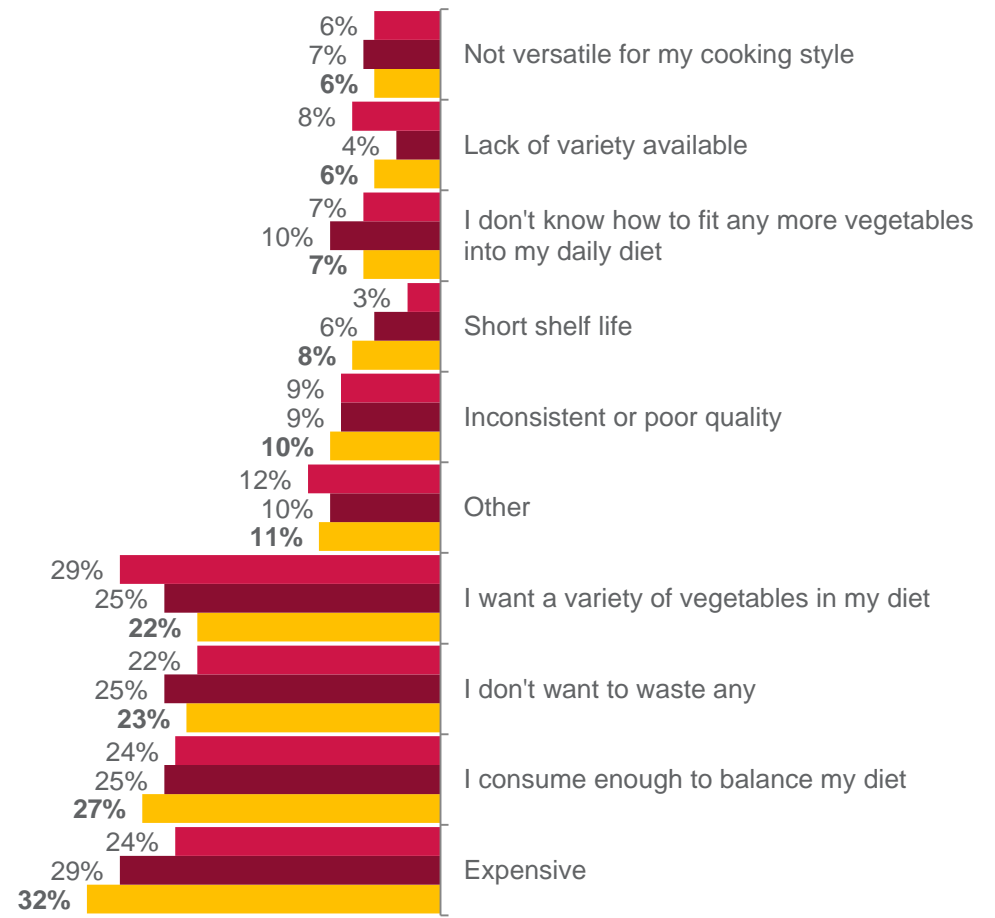
Taste and adding variety are the key triggers to purchase. Price is continuing to increase as the primary reason why consumers do not purchase parsnips more often.



Triggers



Barriers



■ Wave 36: May-16 ■ Wave 40: Sep-16 ■ Wave 44: Jan-17

■ Wave 36: May-16 ■ Wave 40: Sep-16 ■ Wave 44: Jan-17

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



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

Meal occasions tend to occur during dinner and family meals.

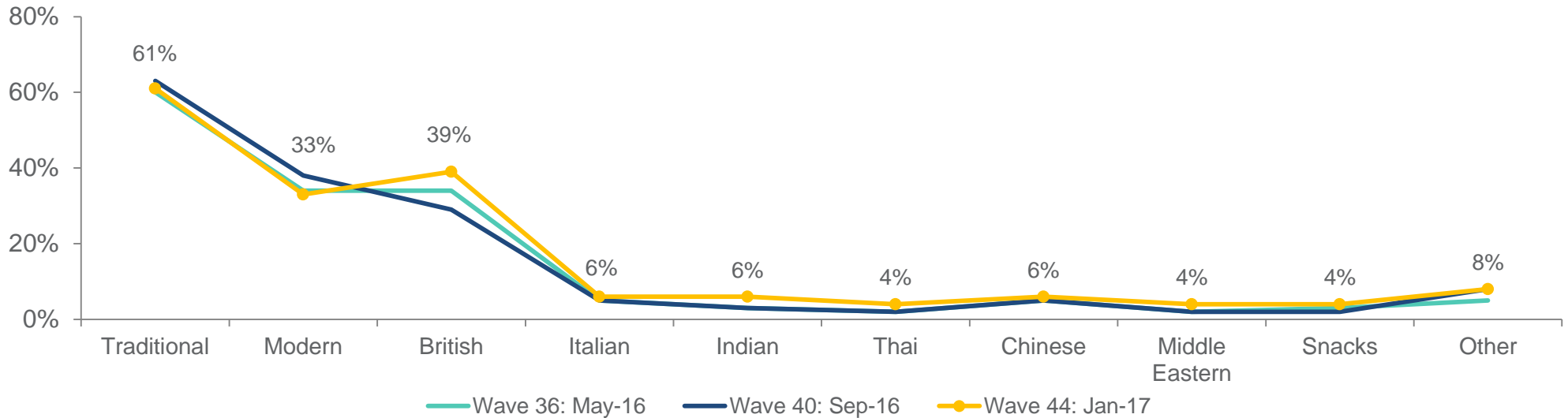
Top 5 Consumption Occasions

	Wave 40	Wave 44
Dinner	68%	68%
Family meals	61%	60%
Weekend meals	40%	36%
Weekday meals	41%	33%
Lunch	10%	14%

8%
used parsnip when cooking a new recipe

▼ 6%, Wave 40

Typical Cuisine Cooked



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

Q10. What cuisines do you cook/consume that use Parsnips?
 Q11. Which of the following occasions do you typically consume/use Parsnips?
 Sample Wave 36 N=202, Wave 40 N=201, Wave 44 N=202

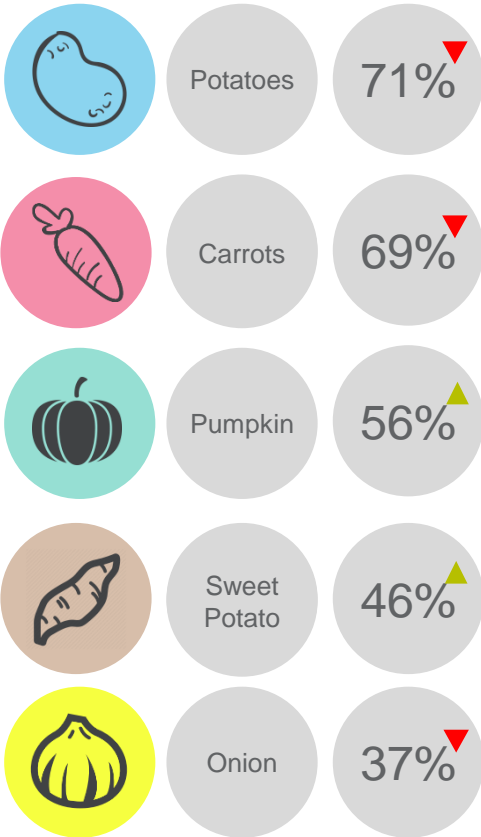


▼: Indicates LOWER score than current wave.
 ▲: Indicates HIGHER score than current wave.



Consumers prefer to serve parsnips with potatoes and carrots. Parsnips are generally roasted, baked or cooked in soups. There has been an increase in boiling and stir frying parsnips as a cooking style over the last three waves.

Accompanying Vegetables

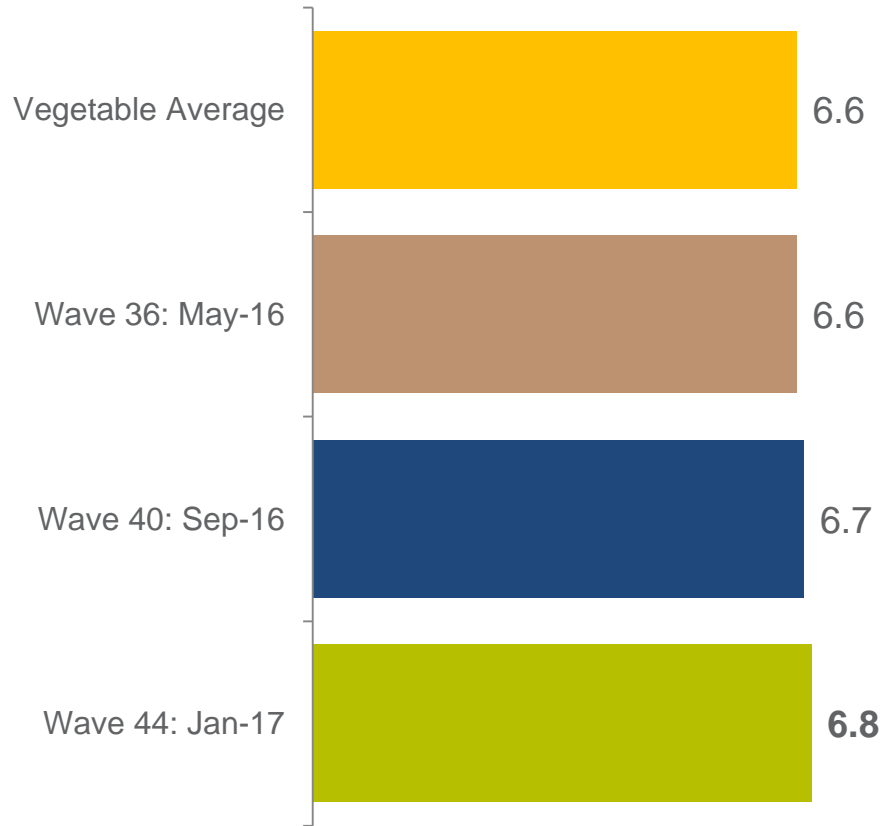


Top 10 Cooking Styles			
	Wave 36	Wave 40	Wave 44
Roasting	64%	61%	66%
Baking	25%	32%	42%
Soup	48%	47%	38%
Mashing	24%	26%	27%
Boiling	14%	18%	26%
Slow Cooking	26%	30%	21%
Stir frying	8%	11%	15%
Steaming	12%	18%	13%
Microwave	6%	7%	6%
Frying	3%	5%	6%

Q9. How do you typically cook Parsnips?
 Q10a. And when are you serving Parsnips which of the following do you also serve together with this?
 Sample Wave 36 N=202, Wave 40 N=201, Wave 44 N=202



Knowing the provenance of parsnips in general has slightly increased in importance this wave, sitting above the Vegetable Average.



Q14. When purchasing Parsnips, how important is Provenance to you?
Q15. And when purchasing Parsnips, how important is that it is grown in Australia?
Sample Wave 36 N=202, Wave 40 N=201, Wave 44 N=202

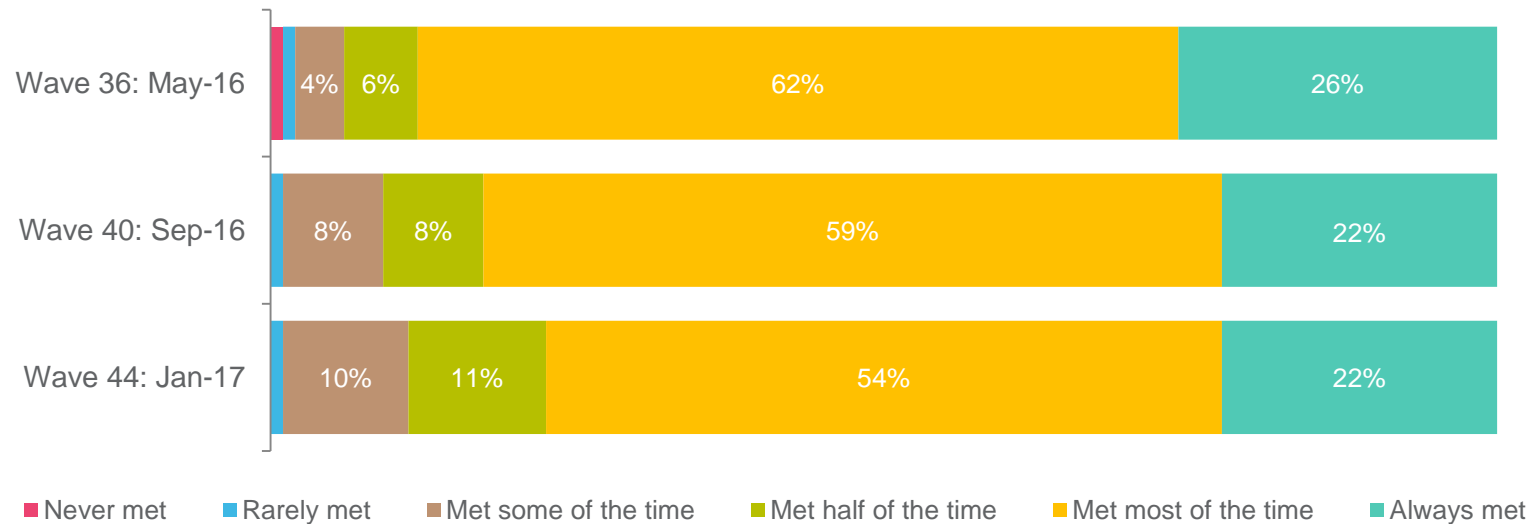


Consumers expect parsnips to remain fresh for approximately nine days. Freshness expectations are not being met as often as the previous two waves.

Expected to stay fresh for 9.2 days

- ▼ 8.7 days, Wave 36
- ▲ 9.6 days, Wave 40

Expectations Met



Q12. How long do you expect Parsnips to stay fresh for, once you have purchased it?
 Q13. How often is this length of freshness met when you buy Parsnips?
 Sample Wave 36 N=202, Wave 40 N=201, Wave 44 N=202

A photograph of several large, light-colored parsnips with characteristic ribbed skin, resting on a dark wooden surface. A large, dark grey circular graphic is overlaid in the center of the image, containing the title text.

Parsnip Product Launch Trends.

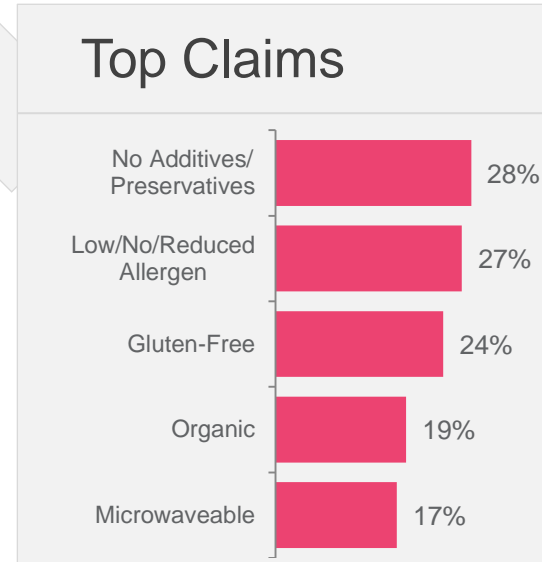
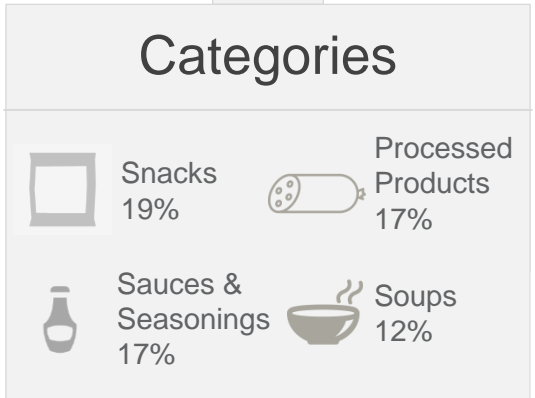
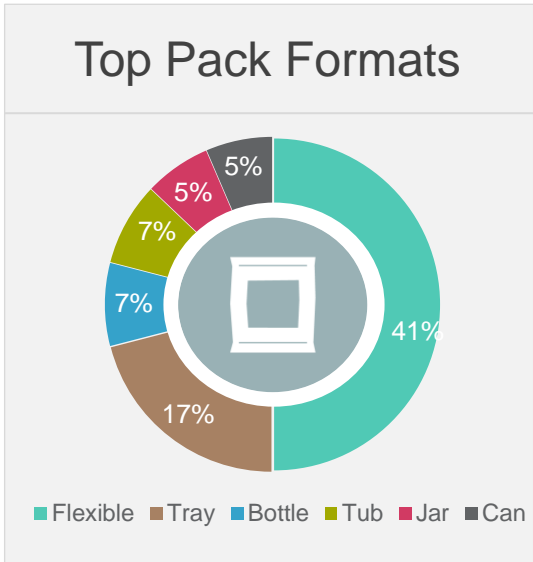
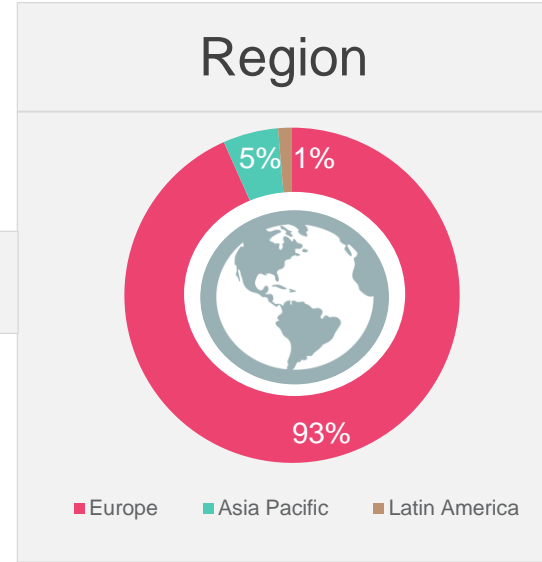
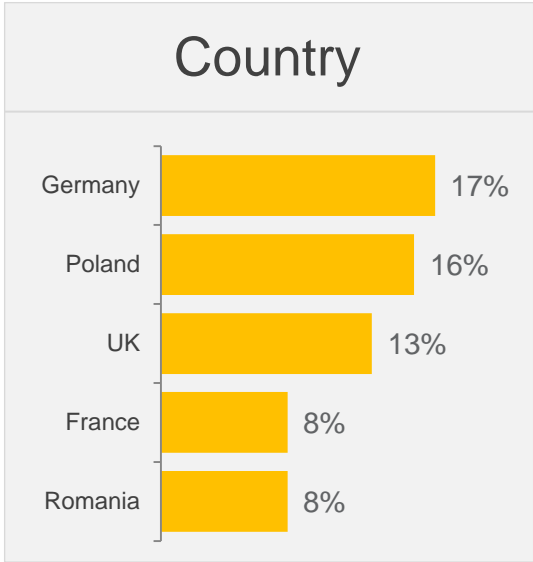
Parsnip Global Launches

October 2016 – January 2017

There were 75 parsnip products launched globally over the last three months. The majority of launches were in Germany, Poland, and UK. Categories for launches were snacks, processed products and sauces & seasonings. Key packaging for parsnip products were flexible formats.



75 Global NPDs





Parsnip Product Launches: Last 3 Months (October 2016 – January 2017) Summary

- There were 75 launches in the past 3 months globally that contained parsnip as an ingredient.
- There was one product launched in Australia over the past three months.
- Europe (93%) was the key region for launches.
- Flexible packaging (41%) and trays (17%) were the most common formats used for products.
- The main categories for launches were snacks (19%), processed products (17%), sauces & seasonings (17%), and soups (12%).
- Claims used on products included no additives/preservatives (28%), low/no/reduced allergen (27%), and gluten-free (24%).
- The most innovative product was Parsnip & Zucchini Rye Bread from Finland. Examples of these can be found in the following pages.



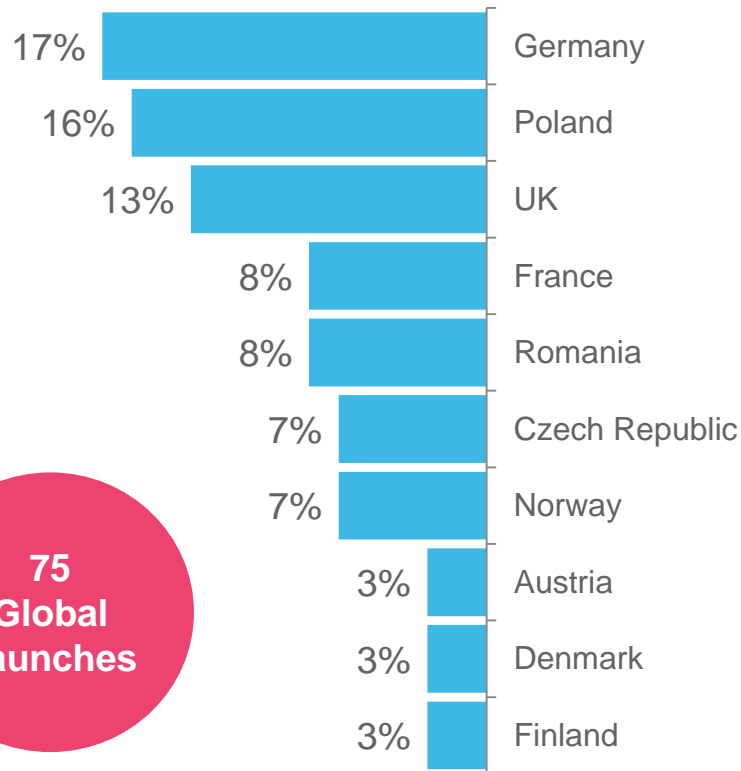
Source: Mintel (2016)



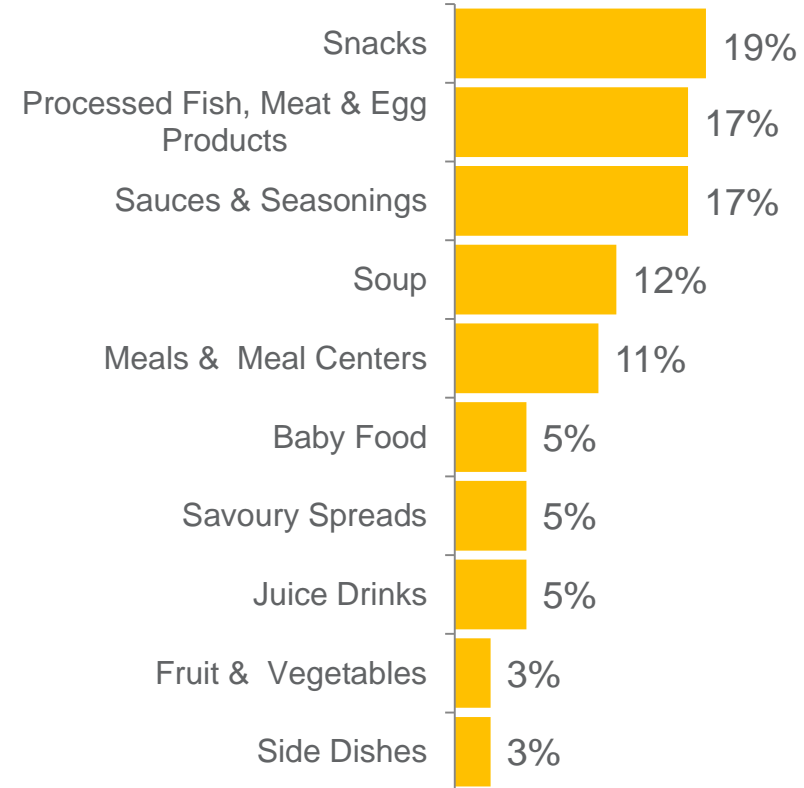
The majority of launches occurred in Germany, Poland, and UK.

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

Top Launch Countries



Top Launch Categories









75
Global
Launches











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

Pack Formats Used

Global		Flexible	41%
		Tray	17%
		Bottle	7%
Europe		Flexible	41%
		Tray	19%
		Tub	7%

Top Claims Used

Global		No Additives/Preservatives	28%
		Low/No/Reduced Allergen	27%
		Gluten-Free	24%
Europe		No Additives/Preservatives	27%
		Low/No/Reduced Allergen	23%
		Gluten-Free	20%



Innovative Parsnip Launches: L3M (October 2016 – January 2017)

ProLaTerre Organic Seaweed Balls (Germany)

ProLaTerre Seetangbällchen (Organic Seaweed Balls) are said to taste good with remoulade sauce. These 100% vegetable and organic tofu balls are made with sustainably produced seaweed from the Netherlands, and can be fried in 3-5 minutes. The product is suitable for vegans and retails in a 150g pack featuring the EU Green Leaf, BIO, AB and Facebook logos. The manufacturer is said to prepare food that is healthy for consumers and for the planet, and to be animal-friendly.



Claims:
Organic, Ethical - Environmentally Friendly Product, Ethical - Animal, Vegan, No Animal Ingredients, Social Media

Edenia Special Pizza (Romania)

Edenia Speciale Pizza (Special Pizza) is now available. This product comprises edam cheese, mozzarella cheese, salami, champignon mushrooms, cooked ham and salami pepiperoni. This stone baked pizza features a thin and crispy crust, and can be prepared for 10 to 12 minutes. The product retails in a 325g pack featuring the Facebook link.



Claims:
Social Media

Coop Vegetardag Salad Cubes (Norway)

Coop Vegetardag Salatterninger (Salad Cubes) are made with pea protein and are suitable for salads, pastas and omelets. The sustainable product is formulated with 0% meat and fish, and is free from soya and gluten, and high in fibre. It is suitable for vegans, can be eaten cold, is ready to use, and retails in a 180g pack containing 2 x 90g units.



Claims:
High/Added Fiber, Vegetarian, Gluten-Free, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Product, Vegan, Ease of Use, No Animal Ingredients

Seeberger Veggie Chips (France)

Seeberger Veggie Chips contain sweet potatoes, beetroot, carrot and parsnip. It is said to have true vegetable taste, and is suitable for vegans without added artificial flavour. This product retails in a 60g pack and was on display at SIAL 2016 in Paris, France.



Claims:
No Additives/Preservatives, Vegan, No Animal Ingredients



Innovative Parsnip Launches: L3M (October 2016 – January 2017)

Uni-President Salad Day by Unif Healthi Bowl 100% Salad Juice (Thailand)

Uni-President Salad Day by Unif Healthi Bowl 100% Salad Juice is made from 257g of vegetable salad and fruit juice. The vegetarian and halal certified juice contains 2,620mcg of beta-carotene, 70 kcal; and is high in vitamin A and C. It is free from added flavour, artificial colour and preservatives; and retails in a 250ml bottle bearing the Facebook link.



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

Babybio Organic Pumpkin & Parsnip Soup (Hong Kong)

Babybio Organic Pumpkin & Parsnip Soup is now available. This vegetable soup is made with pumpkin from the Drome region, parsnip and rice, and is suitable for babies from six months. It is free from added salt, gluten and milk, and can be microwaved. This organic and Ecocert certified product retails in a 190g pack, featuring cooking instructions, the AB, EU Leaf and Facebook logos and a QR code.



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

Bofrost Pan-Fried Swedish Meatballs (France)

Bofrost Poêlée de Boulettes Suédoises de Viande Hachée (Pan-Fried Swedish Meatballs) are now available. The product comprises 20% of precooked pork and beef meat, 25% of mushrooms, 26% of potatoes, 9% of onions and 20% of cream sauce. It can be prepared in ten minutes and retails in a 1000g pack featuring a QR code.



Claims:
N/A

HoviRuoka Handmade Vegetable Patties (Finland)

HoviRuoka Käsintehtydt Kasvispihvit (Handmade Vegetable Patties) are now available. The vegan patties are completely free from animal products and their derivatives, are made from traditional ingredients, and are said to be easy and quick to prepare. The microwaveable product is made using Finnish biogas, and it retails in a pack containing 2 x 80 g units.



Claims:
Microwaveable, Ethical - Environmentally Friendly Product, Vegan, Time/Speed, Ease of Use, No Animal Ingredients



Innovative Parsnip Launches: L3M (October 2016 – January 2017)

Bofrost Mountain Climber Dumplings (Austria)

Bofrost Bergsteigerknödel (Mountain Climber Dumplings) are bread dumplings with a hearty and spicy filling of diced smoked meat, onions and hard cheese. This product cooks in 15 minutes and retails in a 750g pack containing about 15 units and featuring a QR code.



Claims:
N/A

Edenia Four Cheese Pizza (Romania)

Edenia Pizza Quattro Formaggi (Four Cheese Pizza) is now available. This product is topped with Edam cheese, Mozzarella cheese, Emmental cheese and blue cheese. This stone baked pizza features a thin and crispy crust, and can be prepared in 10 to 12 minutes. The product retails in a 320g pack featuring a Facebook link.



Claims:
Social Media

Fazer Parsnip & Zucchini Rye Bread (Finland)

Fazer Kesäkurpitsa & Palsternakka Ruis Juuresleipä (Parship & 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

Kløver Coarse Chopped Root Vegetables (Norway)

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



Claims:
N/A



Beetroot.





Consumption of beetroot has slightly increased this wave, with purchase remaining relatively stable. Coles and Woolworths continue to be the main purchase channels utilised.

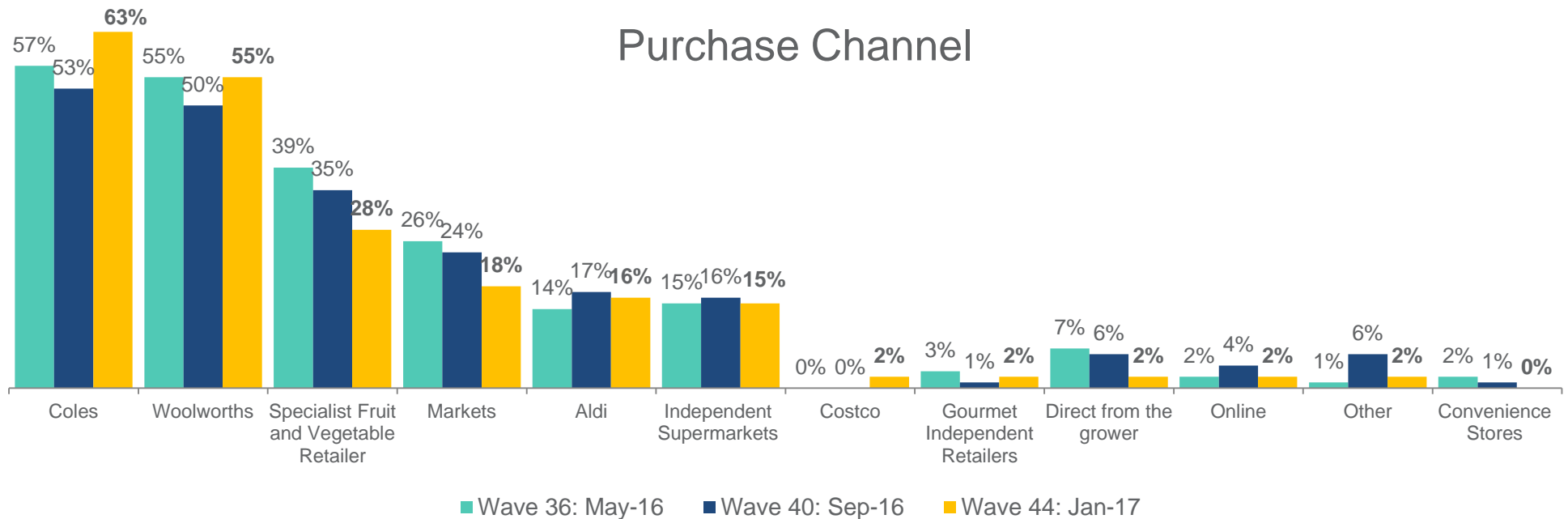


- ▼ 3.1 times, Wave 36
- ▲ 3.4 times, Wave 40



- ▼ 8.3 times, Wave 36
- ▼ 7.8 times, Wave 40

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 36: N=202, Wave 40: N=202, Wave 44: N=202



Average Spend and Price Sensitivity.



Average weight of purchase

The average consumer typically purchases **0.8kg** of beetroots, which is consistent with the previous wave.

- ▲ 0.9kg, Wave 36
- 0.8kg, Wave 40



Recalled last spend

The average recalled last spend is **\$4.30** in January 2017, which has increased this wave.

- ▼ \$3.70, Wave 36
- ▼ \$3.70, Wave 40



Value for money

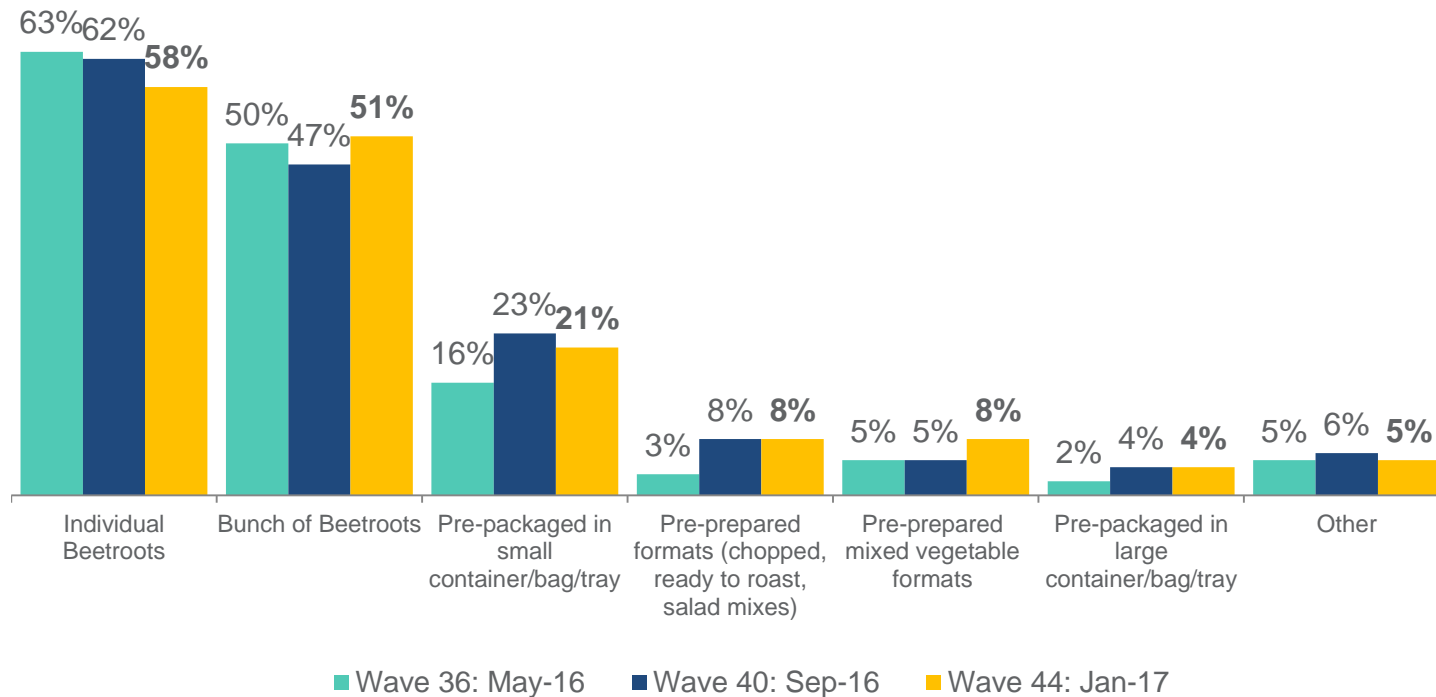
On average, consumers perceive beetroot to be good value for money (**6.4/10**), which is slightly lower than the previous wave.

- ▼ 6.5/10, Wave 36
- ▼ 6.6/10, Wave 40

Q3. How much <commodity> do you typically purchase when you shop for it?
 Q3b. To the best of your memory how much did this cost on your most recent typical purchase?
 Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
 Sample Wave 36: N=202, Wave 40: N=202, Wave 44: N=202



Both individual and bunched beetroot formats appeal most to consumers, consistent with past waves. Small pre-packaged containers are also a popular format purchased.



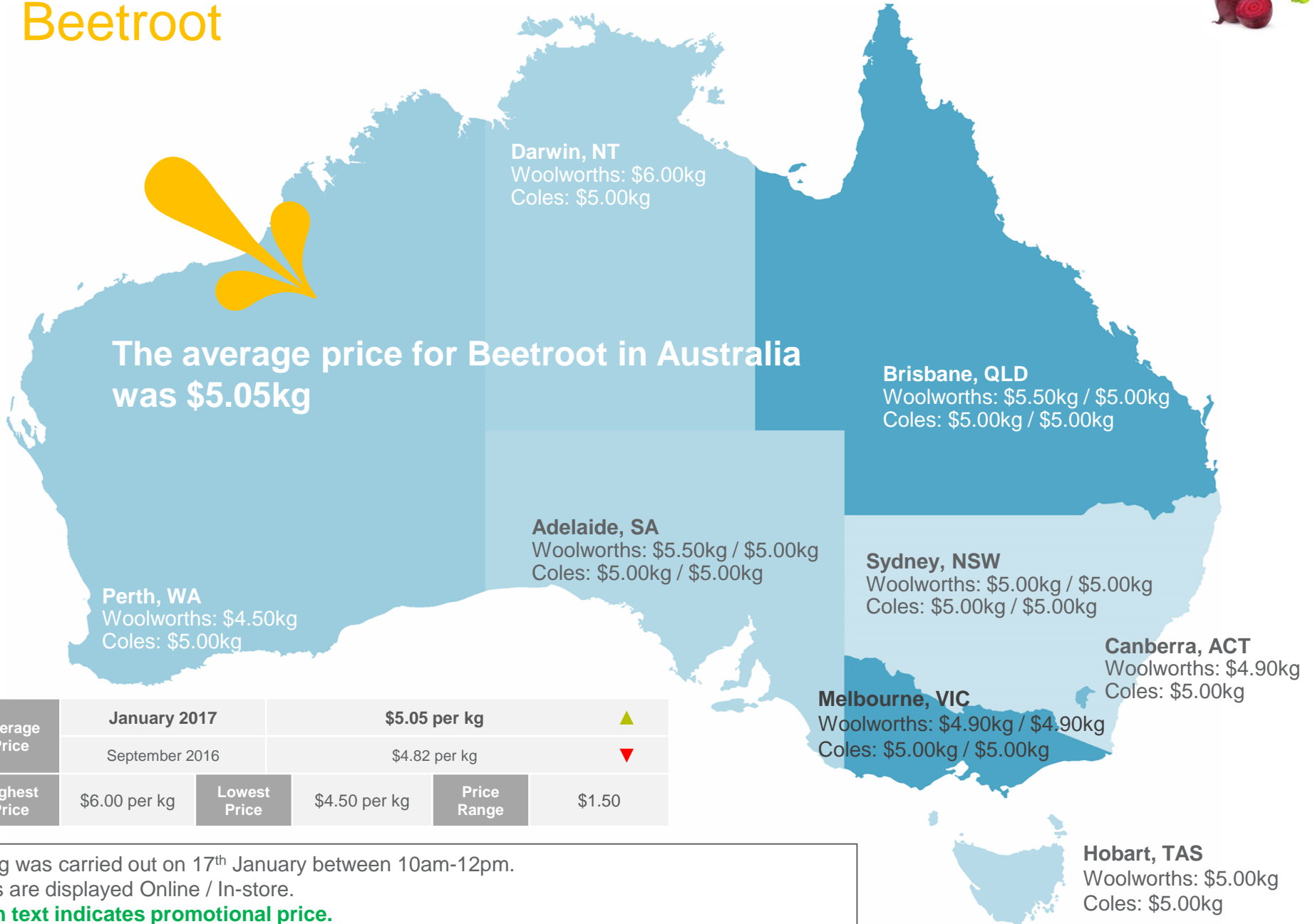
Q4b. In what fresh formats do you typically purchase Beetroot?
Sample Wave 36: N=202, Wave 40: N=202, Wave 44: N=202





Online and In-store Commodity Prices

Beetroot



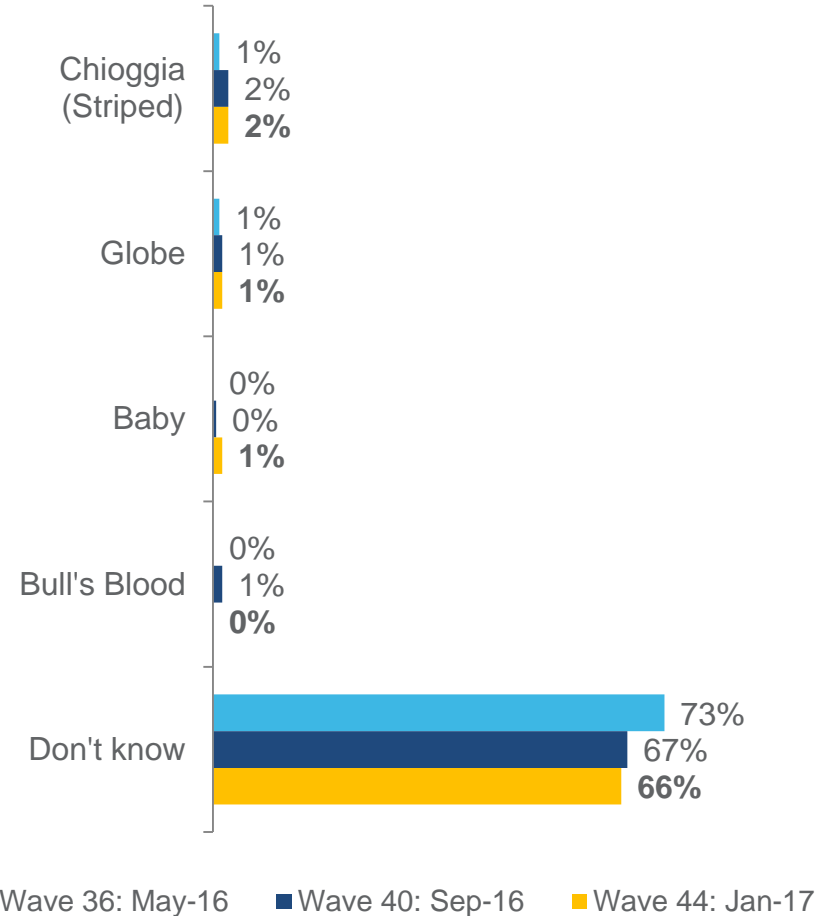
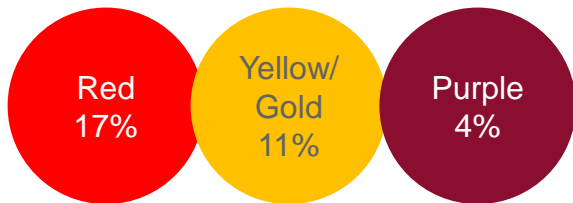
Average Price	January 2017	\$5.05 per kg ▲			
	September 2016	\$4.82 per kg ▼			
Highest Price	\$6.00 per kg	Lowest Price	\$4.50 per kg	Price Range	\$1.50

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



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

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



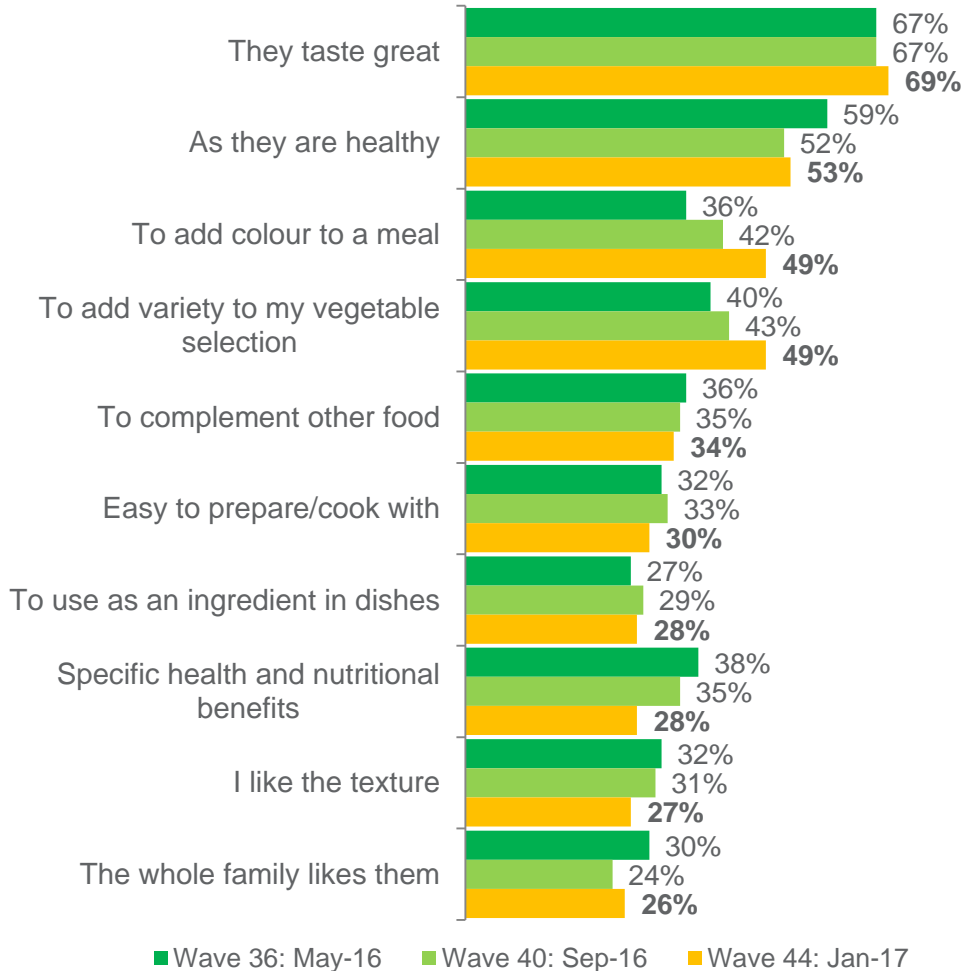
Q6a. What varieties/types of <commodity> are you aware of? (unprompted)
Sample Wave 36: N=202, Wave 40: N=202, Wave 44: N=202



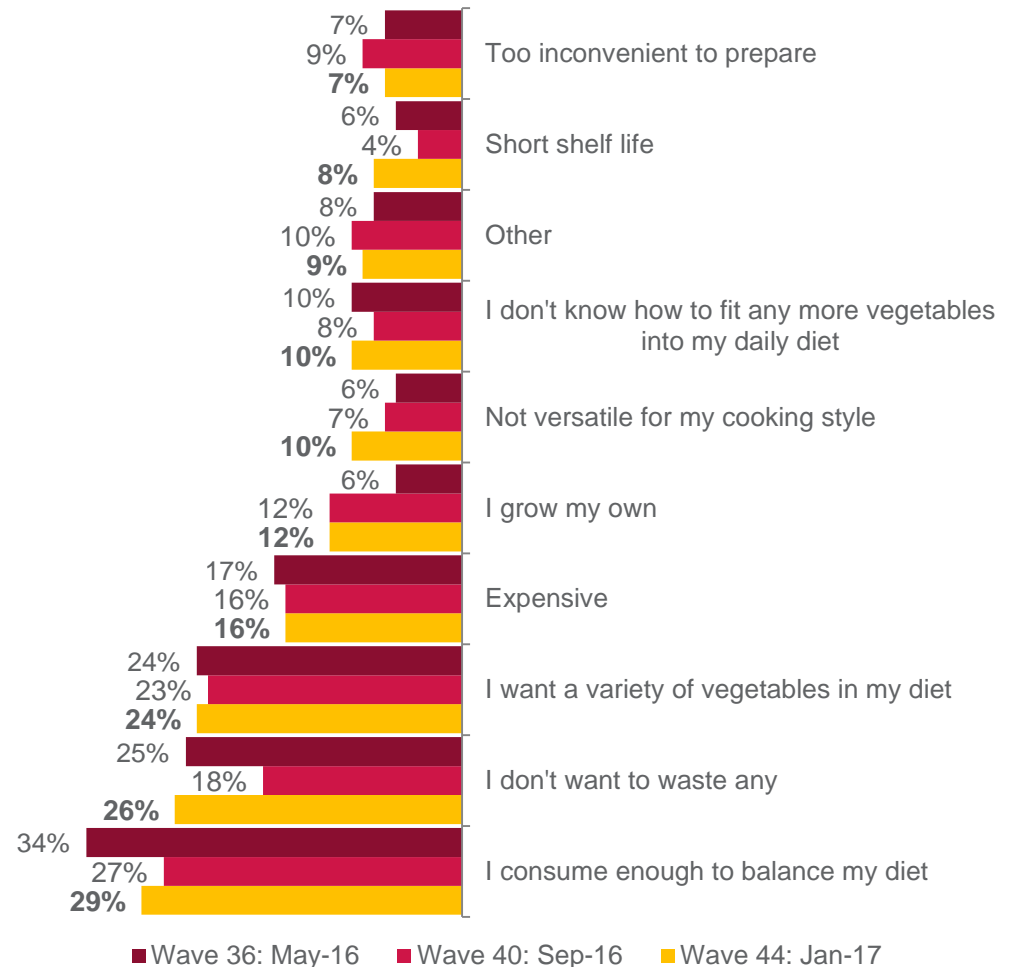
The main triggers for beetroot purchase are taste and health. Consumers list having enough to balance their diet and not wanting to waste any as the key barriers to purchase. There is an increasing trend in adding colour and variety as triggers to purchase.



Triggers



Barriers



Q7. Which of the following reasons best describes why you purchase <commodity> ?
 Q8. Which reason best describes why you don't buy <commodity> more often?
 Sample Wave 36: N=202, Wave 40: N=202, Wave 44: N=202



There was minimal change in typical cuisines cooked with beetroot when compared to past waves. Consumption occasions are generally during dinner and family meals.

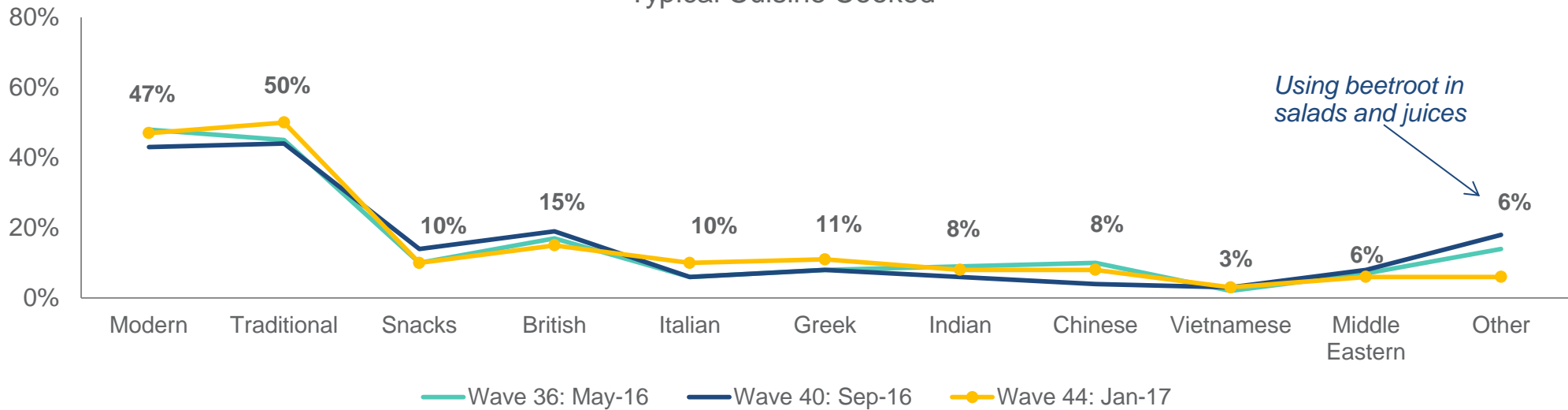
Top 5 Consumption Occasions

	Wave 40	Wave 44
Dinner	61%	54%
Family meals	53%	43%
Lunch	35%	41%
Weekday meals	31%	30%
Weekend meals	35%	30%

16%
used beetroot when cooking a new recipe

— 16%, Wave 40

Typical Cuisine Cooked



Using beetroot in salads and juices



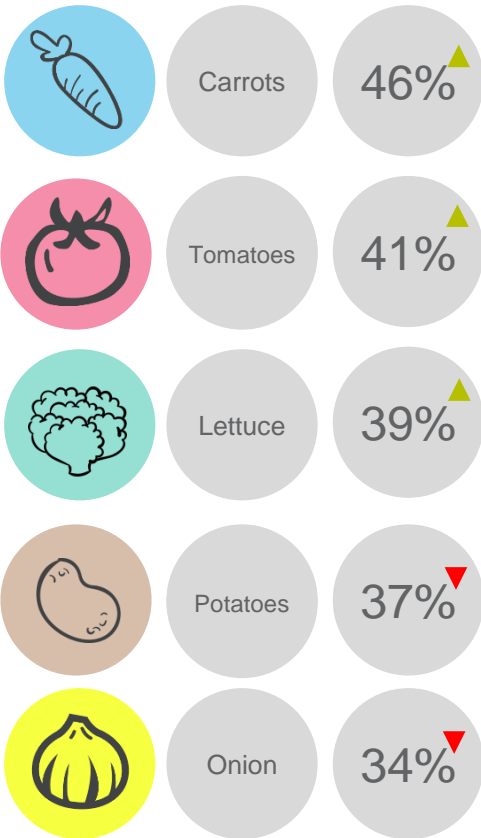
▼ : Indicates LOWER score than current wave.
▲ : Indicates HIGHER score than current wave.

Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?
Sample Wave 36: N=202, Wave 40: N=202, Wave 44: N=202



The most popular cooking styles for beetroot continue to be roasting and boiling. Eating beetroot raw is continuing to increase across the last three waves. Consumers tend to serve beetroot with carrots, tomatoes and lettuce.

Accompanying Vegetables



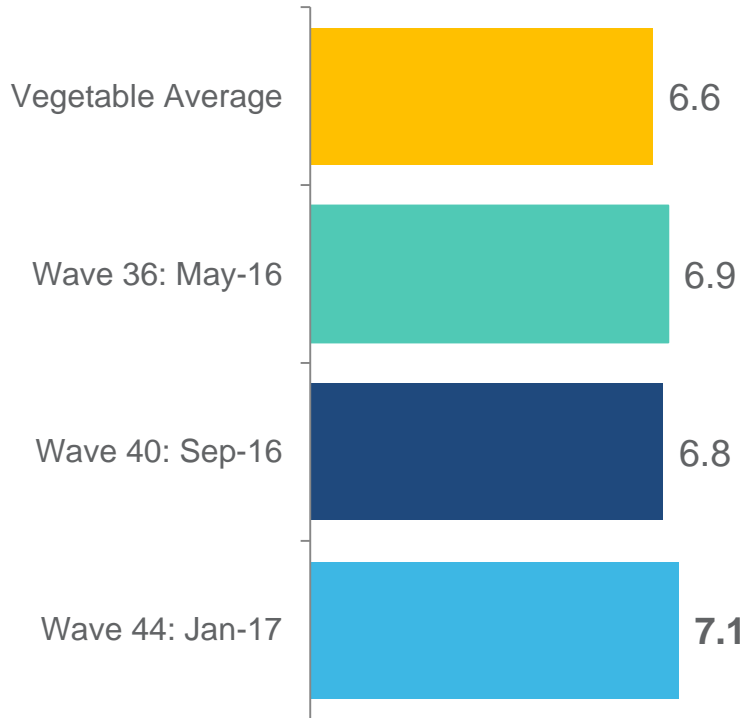
Top Cooking Styles

	Wave 36	Wave 40	Wave 44
Roasting	42%	49%	42%
Boiling	46%	39%	39%
Raw	27%	28%	35%
Baking	24%	24%	26%
Steaming	18%	21%	16%
Slow Cooking	13%	13%	15%
Soup	15%	10%	13%
Stir frying	8%	6%	12%
Grilling	4%	9%	7%
Microwave	2%	8%	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 36: N=202, Wave 40: N=202, Wave 44: N=202



Importance of beetroot provenance has increased this wave, sitting comfortably above the Vegetable Average. Overall, consumers find it very important to know that beetroots are grown in Australia.



Q14. When purchasing <commodity>, how important is Provenance to you?
Mean scores out of 10.
Sample Wave 36: N=202, Wave 40: N=202, Wave 44: N=202

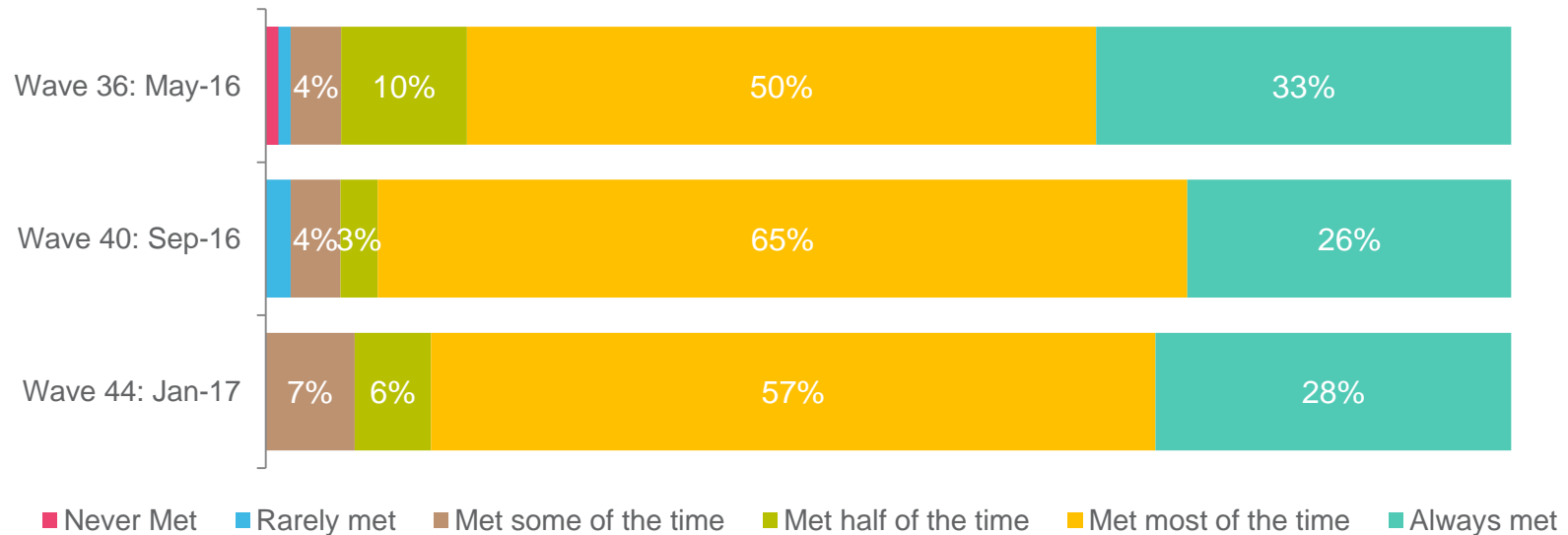


Consumers expect beetroot to remain fresh for 10 days once purchased. This wave sees a decline in beetroot freshness expectations being met at least most of the time.

Expected to stay fresh for 10.0 days

▼ 9.6 times, Wave 36
▲ 11.0 times, Wave 40

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 36: N=202, Wave 40: N=202, Wave 44: N=202



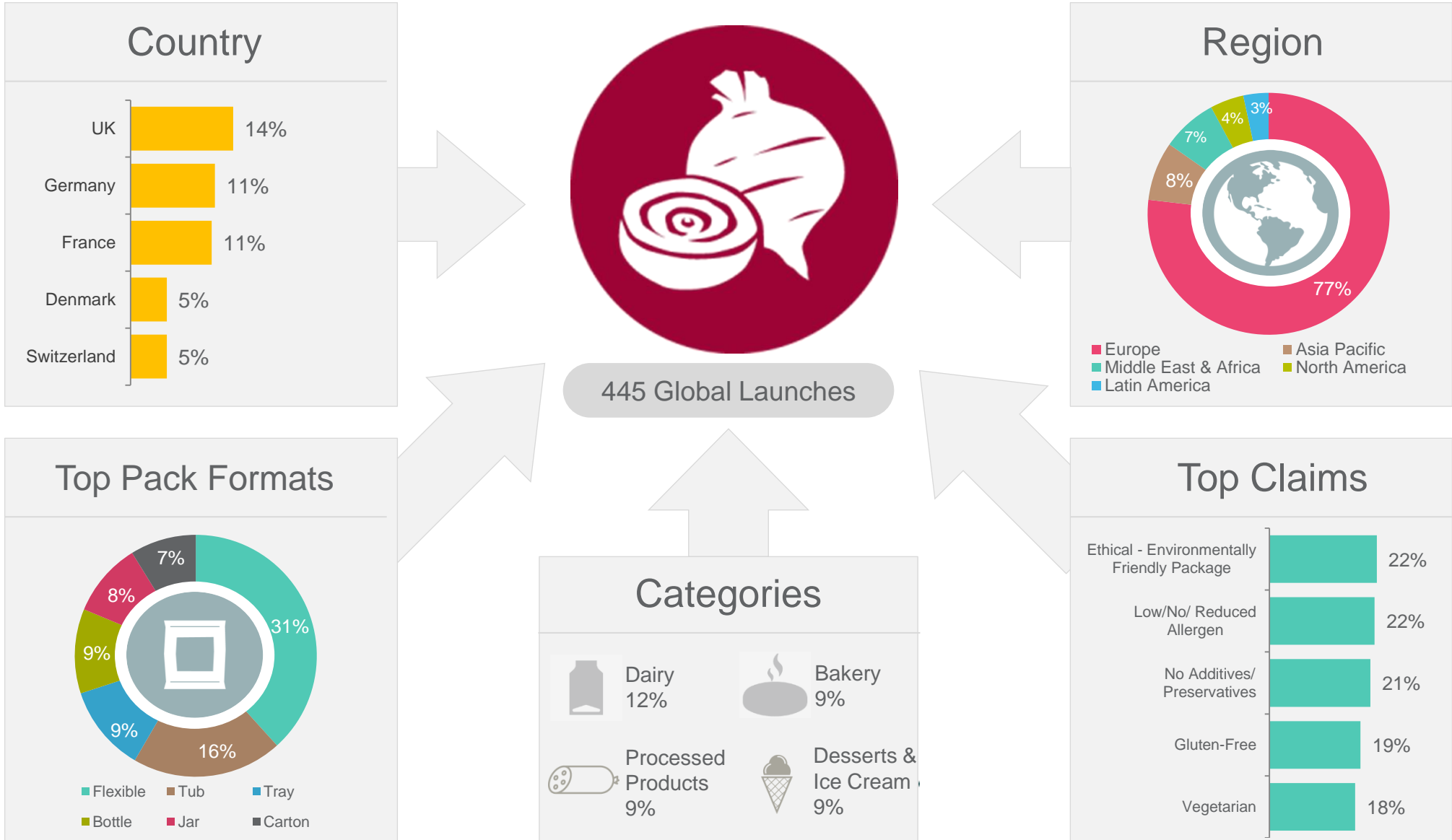
Trends: Beetroot



Beetroot Global NPDs

October 2016 – January 2017

There were 445 products containing beetroot as an ingredient launched globally in the last three months. The majority of these launches occurred in Europe, in particular UK and Germany. Products were launched in dairy, bakery, processed products and desserts & ice cream.





Beetroot Product Launches: Last 3 Months (October 2016 – January 2017) Summary

- There were 445 global beetroot products launched globally over the last three months.
- There were 8 products launched in Australia this wave.
- The majority of products were launched in Europe (77%). Key countries for launches were UK (14%) and Germany (11%).
- Flexible packaging was the most common format used (31%). Tubs were also popularly utilised (16%).
- Top launch categories were dairy (12%), bakery (9%), processed products (9%), and desserts & ice creams (9%).
- Popular claims were around ethical/environmentally friendly packaging (22%), and low/no/reduced allergen (22%).
- The most innovative beetroot product launched was Pork Meat Stuffed Tomatoes from France (examples of these can be found in the following pages).



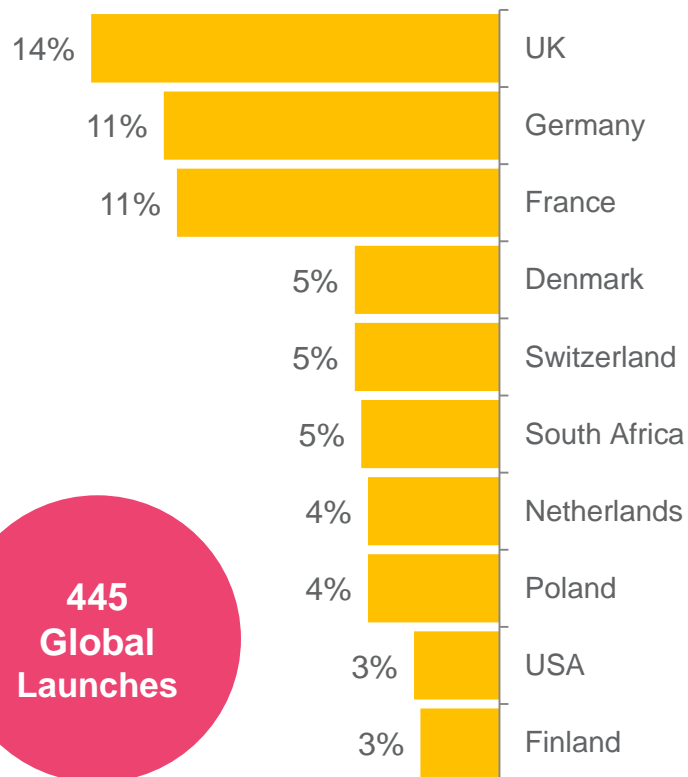
Source: Mintel (2016)





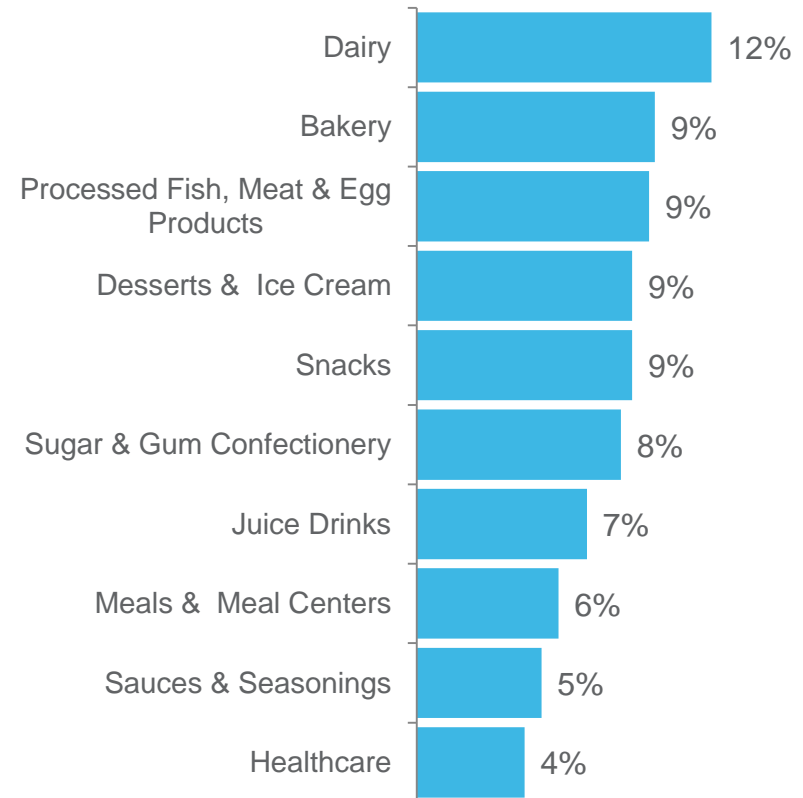
Consistent with the previous waves, UK and Germany were the key countries for product launches. The key categories for launches included dairy, bakery, processed products and desserts & ice cream.

Top Launch Countries



445
Global
Launches










Top Launch Categories














Flexible packaging, tubs and trays were the main formats used for products launches. Ethical – environmentally friendly packaging and low/no/reduced allergen were the key claims used.

Pack Formats Used

Global		Flexible	31%
		Tub	16%
		Tray	9%
Europe		Flexible	28%
		Tub	20%
		Tray	11%
Asia Pacific		Flexible	49%
		Carton	9%
		Flexible sachet	9%

Top Claims Used

Global		Ethical - Environmentally Friendly Package	22%
		Low/No/Reduced Allergen	22%
		No Additives/Preservatives	21%
Europe		Ethical - Environmentally Friendly Package	20%
		Low/No/Reduced Allergen	19%
		No Additives/Preservatives	19%
Asia Pacific		Vegetarian	49%
		No Additives/Preservatives	34%
		Ease of Use	26%



Innovative Beetroot Launches: L3M (October 2016 – January 2017)

Forssan Apple Beet Salad (Finland)

Forssan OmenaPunajuuri Salaatti (Apple Beet Salad) is a ready to serve salad in mayonnaise that contains fresh rapeseed oil, which is a source of omega 3. This product is free from lactose and gluten, and retails in a 350g pack.



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

Tesco Sour Cherry Flavoured Caucasian Kefir (Hungary)

Tesco Meggyes Kaukazusi Kefir (Sour Cherry Flavoured Caucasian Kefir) is a homogenised milk drink with live culture. This product contains 2.9% fat, and retails in a 500ml pack.



Claims:
N/A

Camelicious Strawberry Flavoured Pasteurised Camel Milk (France)

Camelicious Strawberry Flavoured Pasteurised Camel Milk is 100% natural. The halal certified milk retails in a 250ml pack featuring a QR code. This product was on display at SIAL 2016 in Paris, France.



Claims:
All Natural Product, Halal

L'Étal du Boucher Pork Meat Stuffed Tomatoes (France)

L'Étal du Boucher Tomates Farcies Viande de Porc (Pork Meat Stuffed Tomatoes) are now available. The product comprises tomatoes stuffed with a seasoned minced French Pork preparation, and retails in a 600g pack, containing four units.



Claims:
N/A



Innovative Beetroot Launches: L3M (October 2016 – January 2017)

Amkez Dried Beetroot (France)

Amkez Dried Beetroot is now available. This product retails in a 30g pack and was on display at SIAL 2016 in Paris, France.



Claims:
All Natural Product

Foods by Ann Lio Shake Beetroot Lio Shake (France)

Foods by Ann Beetroot Lio Shake provides natural vitamins and minerals. The product is free from lactose, gluten and added sugar. It is suitable for vegans and retails in a 50g pack, featuring a QR code. This product was on display at SIAL 2016 in Paris, France.



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

Fit & Easy Super Koktajl Vegetable Mix for Red Cocktail (Poland)

Fit & Easy Super Koktajl Mieszanka Warzyw do Czerwonego Koktajlu (Vegetable Mix for Red Cocktail) is now available. It contains beetroot, celery and carrot and is a natural source of vitamin A which helps maintain a healthy skin. The product is the perfect base for making fruit and veggie smoothies, and retails in 400g pack.



Claims:
Other (Functional), Ease of Use, Slimming

Hälsans Kök Falafel & Friends Falafel with Beetroot Flavouring (Sweden)

Hälsans Kök Falafel & Friends Rödbeta (Falafel with Beetroot Flavouring) is now available. The vegan and vegetarian falafels are a source of protein, and are made with chickpeas and beetroot. The product retails in a recyclable 300g pack bearing a QR code and the Facebook logo.



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



Innovative Beetroot Launches: L3M (October 2016 – January 2017)

Müller's Hausmacher Wurst Chili con Carne in Spicy Sauce (Germany)

Müller's Hausmacher Wurst Chili Con Carne in Pikanter Sauce (Chili con Carne in Spicy Sauce) has been relaunched under a new brand. This product can be prepared quickly in the microwave, is made with pure minced beef, and retails in a 200g pack.



Claims:
Microwaveable, Time/Speed

Boots Nutritious Roasted Beetroot & Wensleydale on Wholemeal Bread (UK)

Boots Nutritious Roasted Beetroot & Wensleydale on Wholemeal Bread features roasted beetroot with a Wensleydale and reduced fat soft cheese mix, lettuce and red onion on wholemeal bread. The vegetarian product is a source of fibre, folic acid and manganese, provides one of the five recommended vegetable portions a day, is said to make the lunch easy, contains 343 calories, and retails in a recyclable pack.



Claims:
Low/No/Reduced Fat, Vegetarian, Wholegrain, Ethical - Environmentally Friendly Package, Ease of Use

Rude Health Gluten Free Beetroot Bar (South Africa)

Rude Health Gluten Free Beetroot Bar is described as a vegetable powerhouse in the pocket. The gluten free product is dairy free, contains no refined sugars and is suitable for vegetarians. It is kosher certified, and retails in a 35g pack that carries the Facebook, Twitter, Pinterest and Instagram logos.



Claims:
Kosher, Vegetarian, Gluten-Free, Low/No/Reduced Allergen, On-the-Go, Social Media

Pitango Creamy Beetroot Risotto with Mint (New Zealand)

Pitango Creamy Beetroot Risotto with Mint comprises tender, vibrant beetroot, and arborio rice in a creamy sauce with a splash of white wine and mint. This heat and eat prepared meal is made with ingredients from local growers is a source of protein, and contains no gluten, preservatives, artificial colours or flavours. The microwavable product is vegetarian, is ready in just three minutes, and retails in a 350g pack sufficient for one person.



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



Australian Beetroot Launches: L3M (October 2016 – January 2017)

The Daily Juice Company Nourish Beetroot, Orange, Apple, Cranberry & Lemon Juice

The Daily Juice Company Nourish Beetroot, Orange, Apple, Cranberry & Lemon Juice is said to have a hint of lemon, a dash of cranberry, and is blended with delicious apples, juicy oranges and the goodness of beetroot. The product contains no added sugar, has a health star rating of five and retails in a recyclable 1L pack.



Claims:

Low/No/Reduced Sugar, Ethical - Environmentally Friendly Package

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

Proud & Punch Turn Up Beet Frozen Juice Pops with Granny Smith Apple, Beetroot, Carrot & Ginger are made with 100% Australian sourced fruits and vegetables. The product retails in a 450ml recyclable pack containing six individually wrapped units.

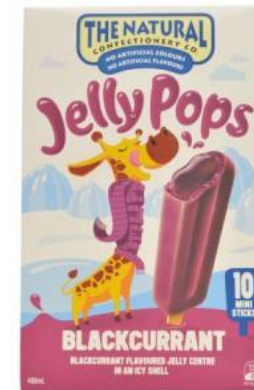


Claims:

Ethical - Environmentally Friendly Package

The Natural Confectionery Co. Blackcurrant Jelly Pops

The Natural Confectionery Co. Blackcurrant Jelly Pops are new to the range. This product consists of blackcurrant flavoured jelly centre in an icy shell, is free of artificial colours and flavours and retails in a 400ml recyclable pack containing 10 mini sticks.



Claims:

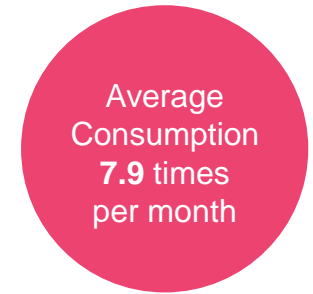
No Additives/Preservatives, Children (5-12), Ethical - Environmentally Friendly Package

A close-up photograph of several sweetpotatoes with reddish-brown skin and some yellowish-orange spots. A large, dark grey circle is overlaid in the center of the image.

Sweetpotatoes.



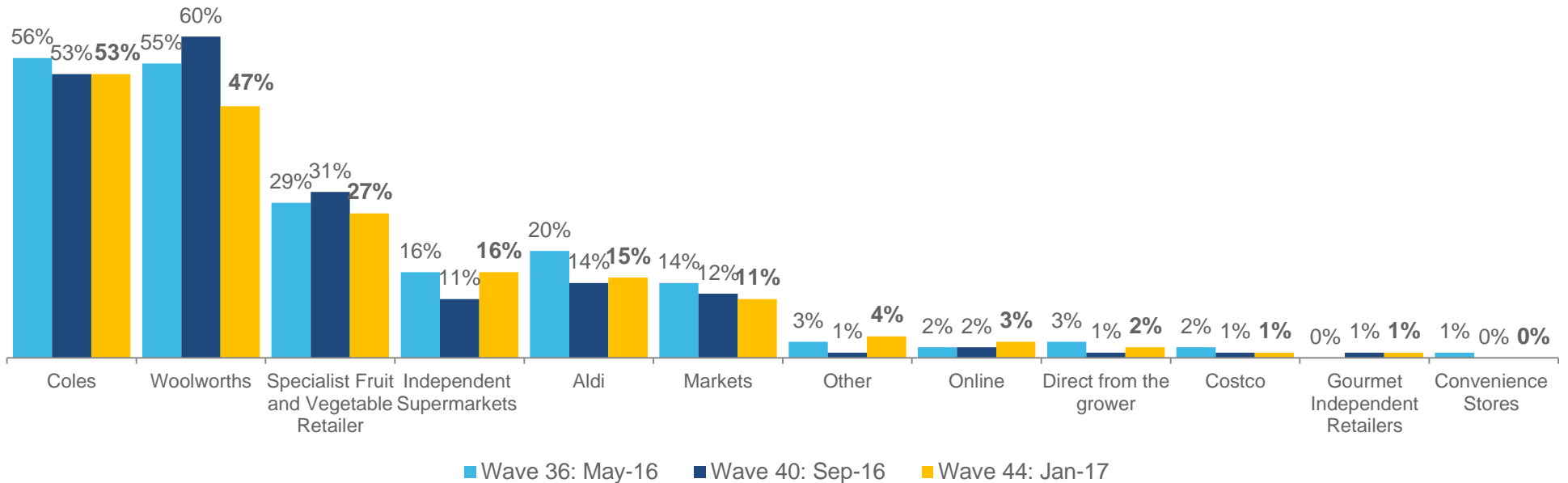
Consumption and purchase both increased this wave, with average consumption approximately twice per week. Consumers continue to purchase sweetpotatoes from mainstream retailers.



▲ 3.6 times, Wave 36
▼ 3.1 times, Wave 40

▲ 8.3 times, Wave 36
▼ 7.6 times, Wave 40

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 36 N=205, Wave 40 N=201, Wave 44 N=209



Average Spend and Price Sensitivity.



Average weight of purchase

The average consumer typically purchased **1.2kg** of sweetpotatoes in January 2017, which has slightly increased this wave.

- ▲ 1.3kg, Wave 36
- ▼ 1.1kg, Wave 40



Recalled last spend

The average recalled last spend for sweetpotatoes was **\$4.00**, which has increased by \$0.50 from the previous wave.

- ▼ \$3.80, Wave 36
- ▼ \$3.50, Wave 40



Value for money

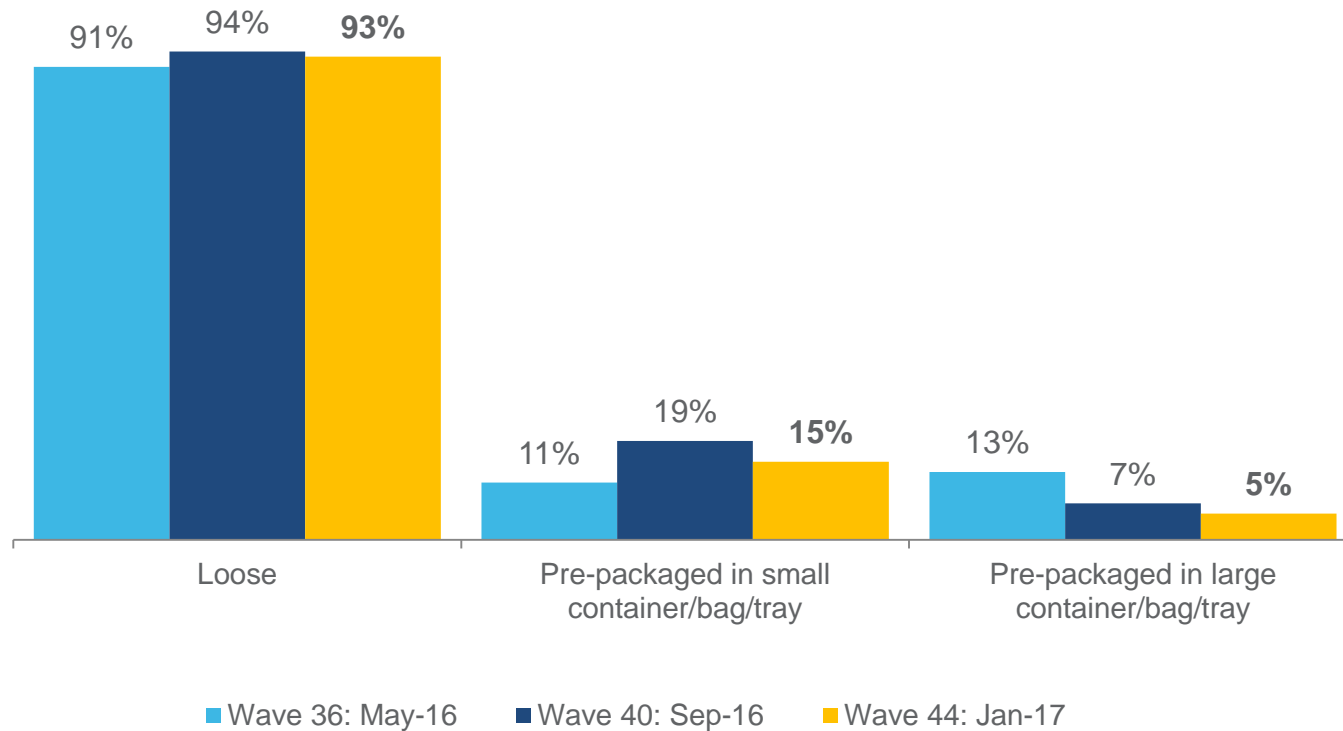
On average, consumers perceived sweetpotatoes to be relatively good value for money (**6.5/10**), slightly lower than the previous wave.

- ▲ 6.8/10, Wave 36
- ▲ 6.8/10, Wave 40

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 36 N=205, Wave 40 N=201, Wave 44 N=209



The majority of consumers are purchasing individual sweetpotatoes, consistent with past waves.



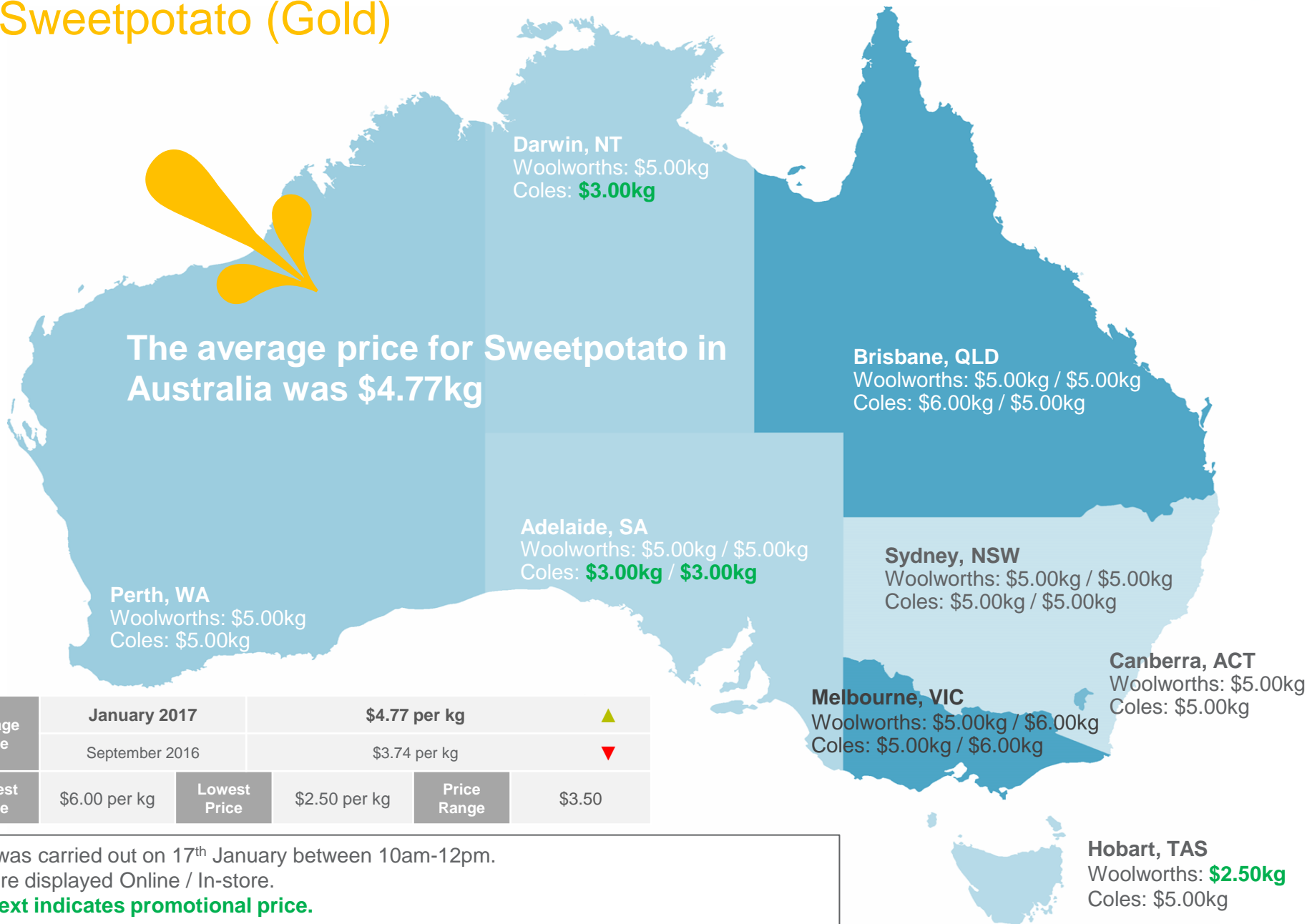
Q4b. In what fresh formats do you typically purchase Sweetpotato?
Sample Wave 36 N=205, Wave 40 N=201, Wave 44 N=209



Online and In-store Commodity Prices



Sweetpotato (Gold)



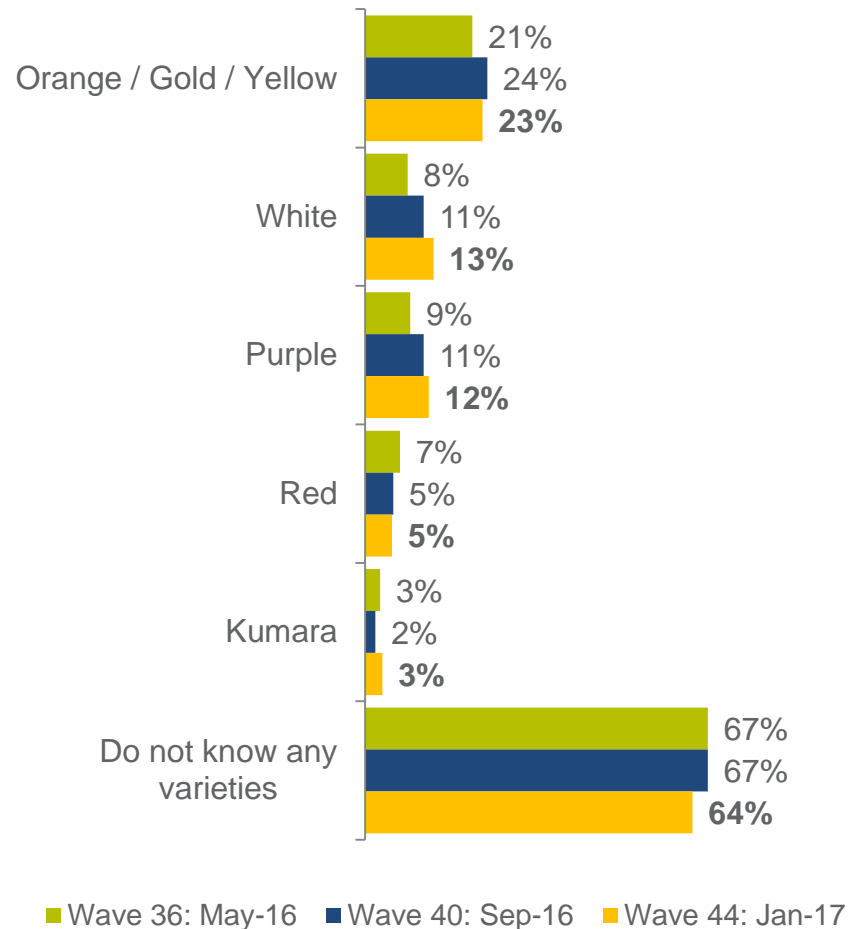
Average Price	January 2017	\$4.77 per kg		▲	
	September 2016	\$3.74 per kg		▼	
Highest Price	\$6.00 per kg	Lowest Price	\$2.50 per kg	Price Range	\$3.50

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



Approximately two thirds (64%) of consumers are unable to recall a type of sweetpotato.

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

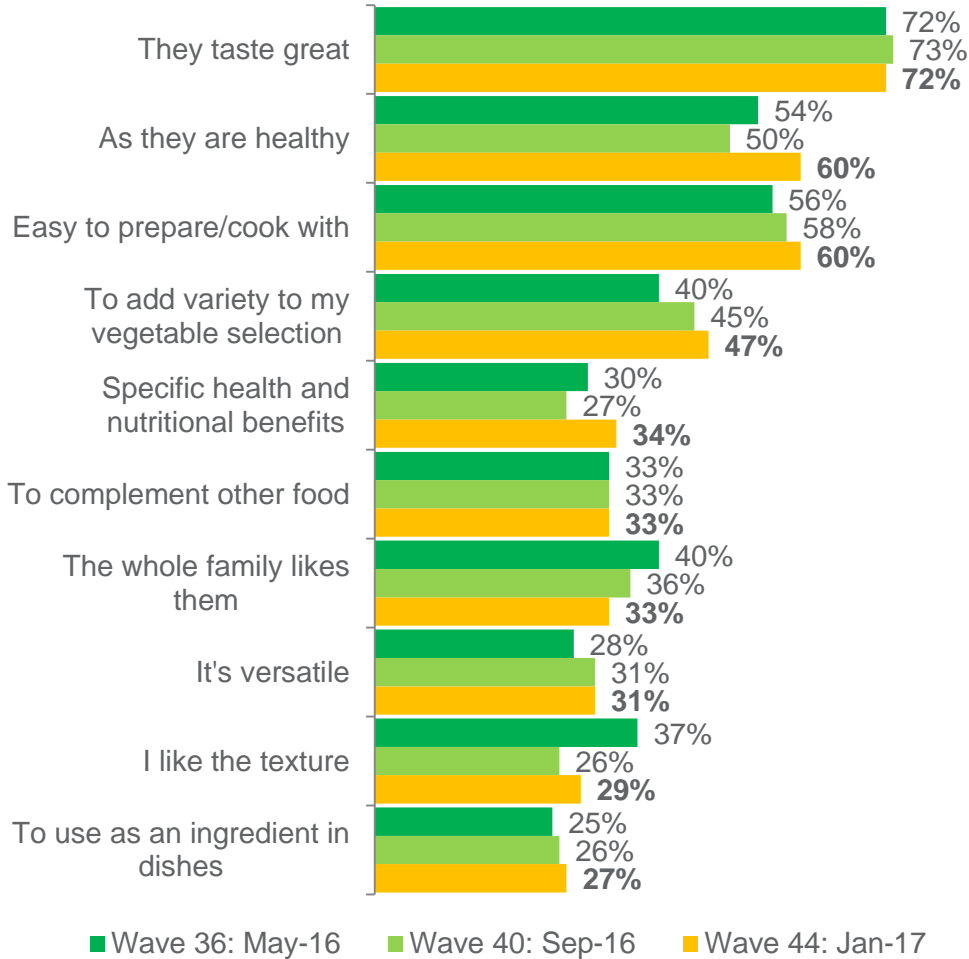




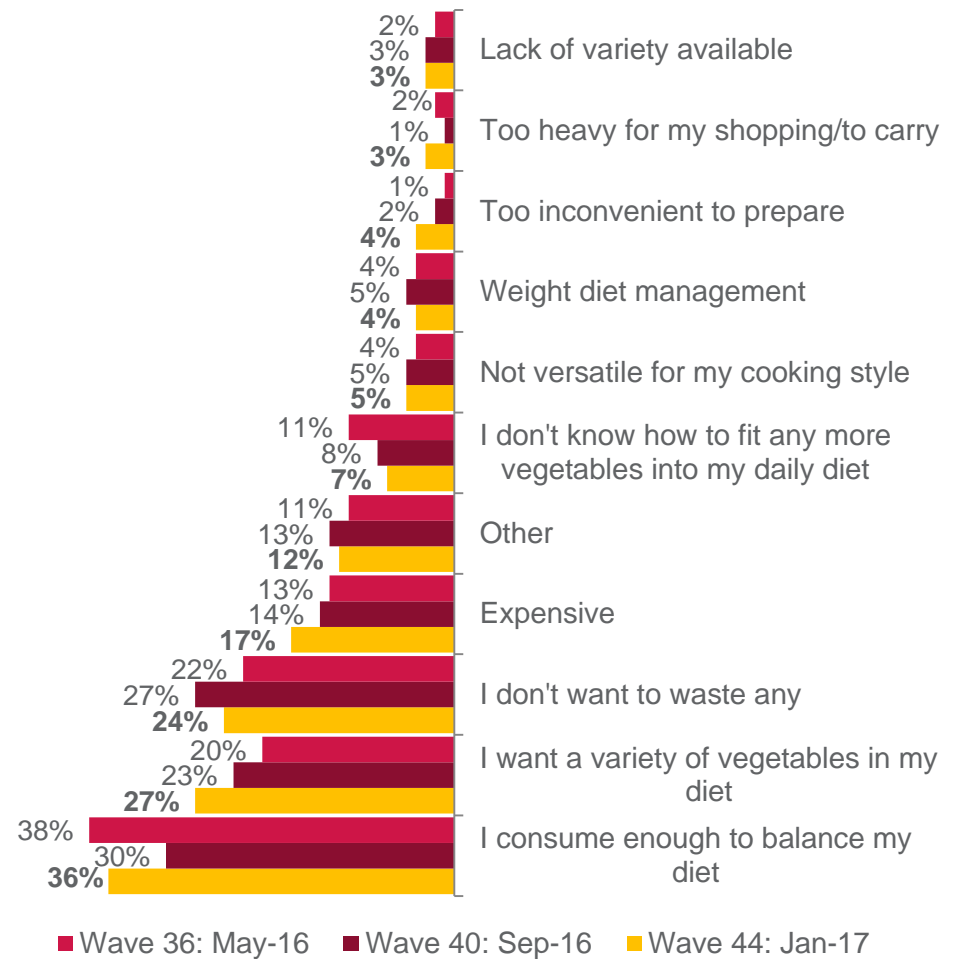
Taste, health and ease of preparation remain the key drivers for sweetpotato purchases. Already consuming enough and wanting a variety are the main barriers to purchase.



Triggers



Barriers



Q7. Which of the following reasons best describes why you purchase <commodity> ?
 Q8. Which reason best describes why you don't buy <commodity> more often?
 Sample Wave 36 N=205, Wave 40 N=201, Wave 44 N=209



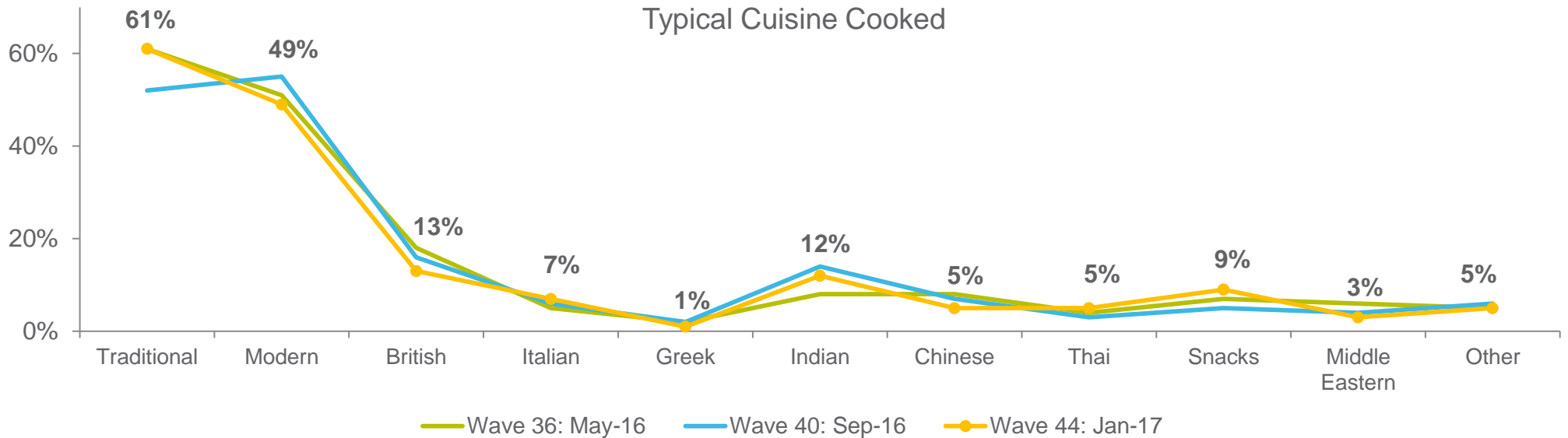
Sweetpotato cooking remains heavily skewed towards Australian cuisines. Consumption occasions tend to be based around dinner.

Top 5 Consumption Occasions

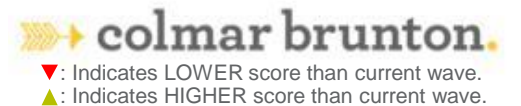
	Wave 40	Wave 44
Dinner	71%	74%
Family meals	59%	56%
Weekday meals	34%	44%
Weekend meals	28%	39%
Quick Meals	28%	25%

9% used sweet-potatoes when cooking a new recipe

▲ 10%, Wave 40

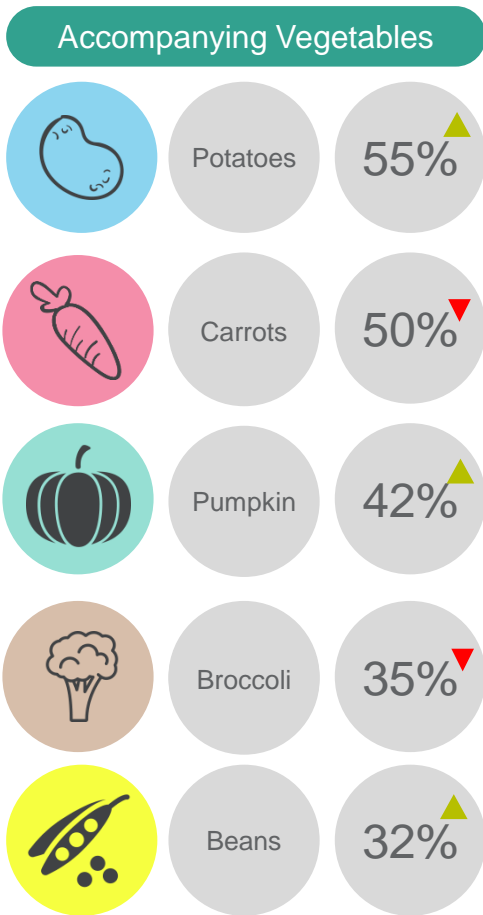


Q10. What cuisines do you cook/consume that use <commodity> ?
 Q11. Which of the following occasions do you typically consume/use <commodity> ?
 Sample Wave 36 N=205, Wave 40 N=201, Wave 44 N=209





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

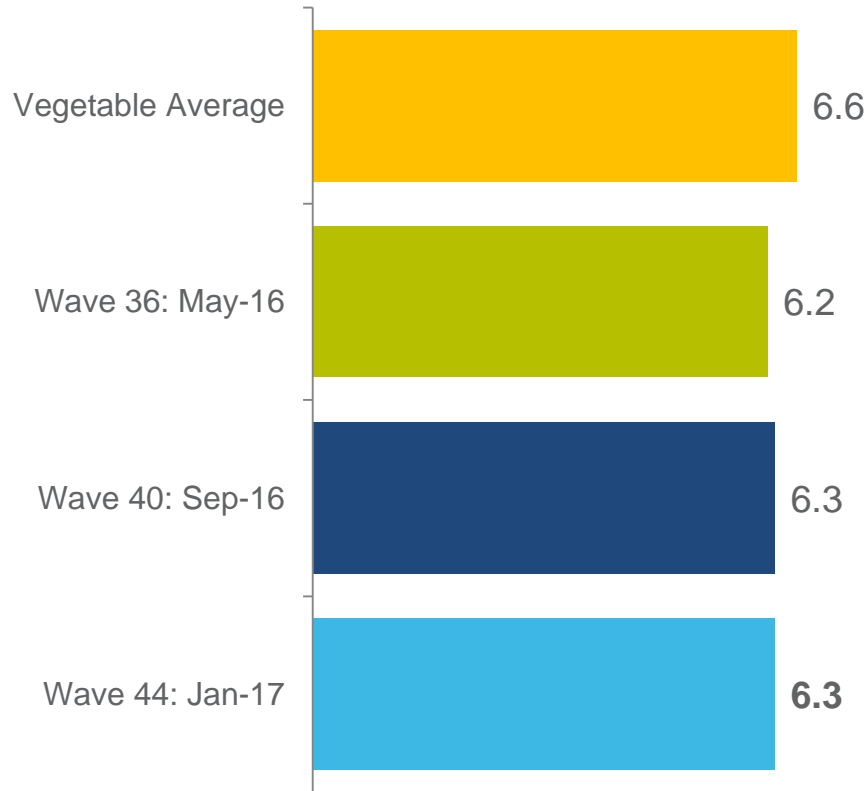


Top Cooking Styles			
	Wave 36	Wave 40	Wave 44
Roasting	62%	56%	60%
Mashing	42%	45%	44%
Baking	49%	51%	41%
Boiling	33%	35%	32%
Steaming	27%	26%	30%
Slow Cooking	16%	17%	16%
Soup	20%	18%	15%
Microwave	15%	11%	14%
Frying	12%	14%	14%
Stir frying	6%	8%	13%

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 36 N=205, Wave 40 N=201, Wave 44 N=209



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



Q14. When purchasing <commodity>, how important is Provenance to you?
Mean scores out of 10.
Sample Wave 36 N=205, Wave 40 N=201, Wave 44 N=209

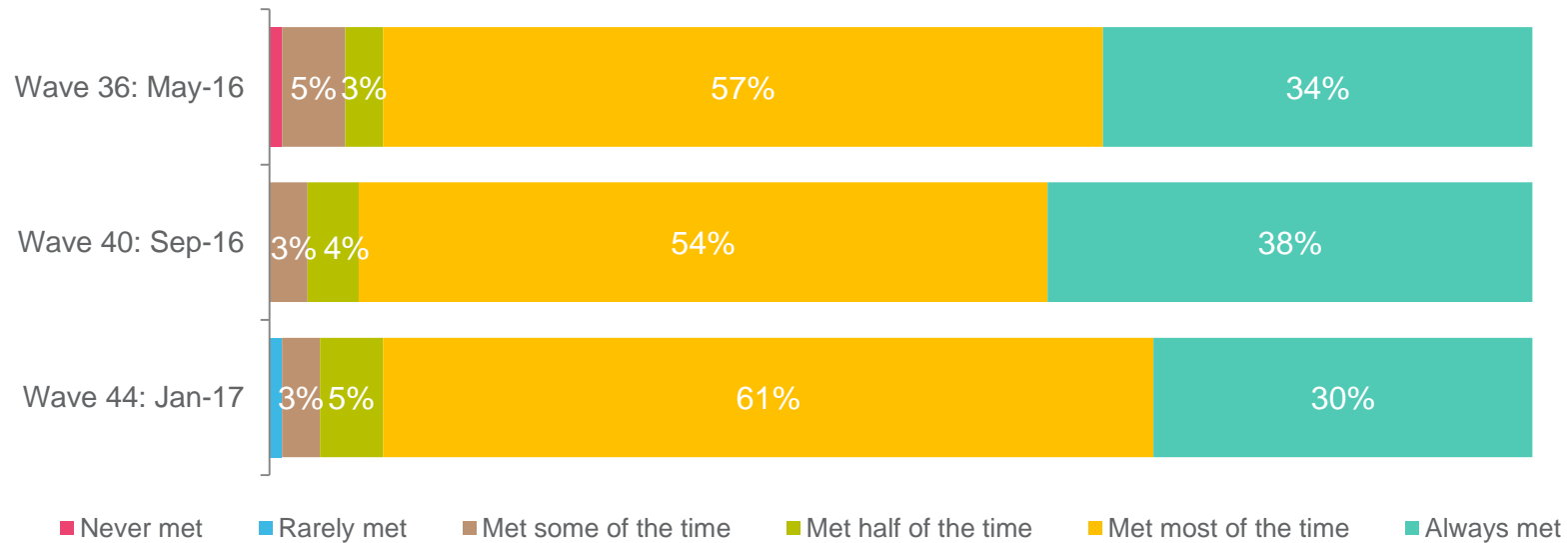


Sweetpotatoes are expected to stay fresh for approximately two weeks. Whilst expectations are being met at least most of the time, this wave sees a decline in freshness expectations being always met.

Expected to stay fresh for **13.5 days**

▼ 12.8 days, Wave 36
▲ 14.0 days, Wave 40

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 36 N=205, Wave 40 N=201, Wave 44 N=209



Trends: Sweetpotatoes.



Sweetpotato Global NPDs

October 2016 – January 2017

There were 1888 global launches over the past three months that contained Sweetpotato as an ingredient. These were predominantly launched in Europe and Asia Pacific, particularly in Germany and USA. Key categories for launches were skincare, snacks and bakery items.





Sweetpotato Product Launches: Last 3 Months (October 2016 – January 2017) Summary

- There were 1888 global launches over the past three months that contained Sweetpotato as an ingredient, relatively consistent with the previous wave (1908).
- There were 26 products launched in Australia over the last three months.
- Products were predominantly launched in Europe (45%) and Asia Pacific (28%).
- The main category launches were skincare (17%), snacks (11%), and bakery items (11%).
- Common pack formats used were flexible packaging (30%), bottles (15%) and tubes (11%).
- Popular claims used on products were botanical/herbal (24%), no additives/preservatives (21%), and moisturising/hydrating (15%).
- The most innovative product launched was a Pumpkin & Sweet Potato Yogurt from Japan. Other examples can be found on the following pages.



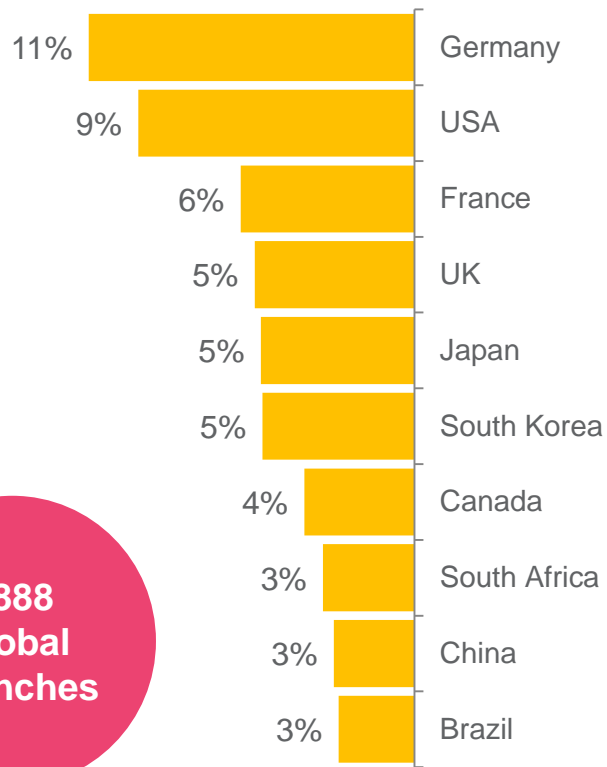
Source: Mintel (2016)





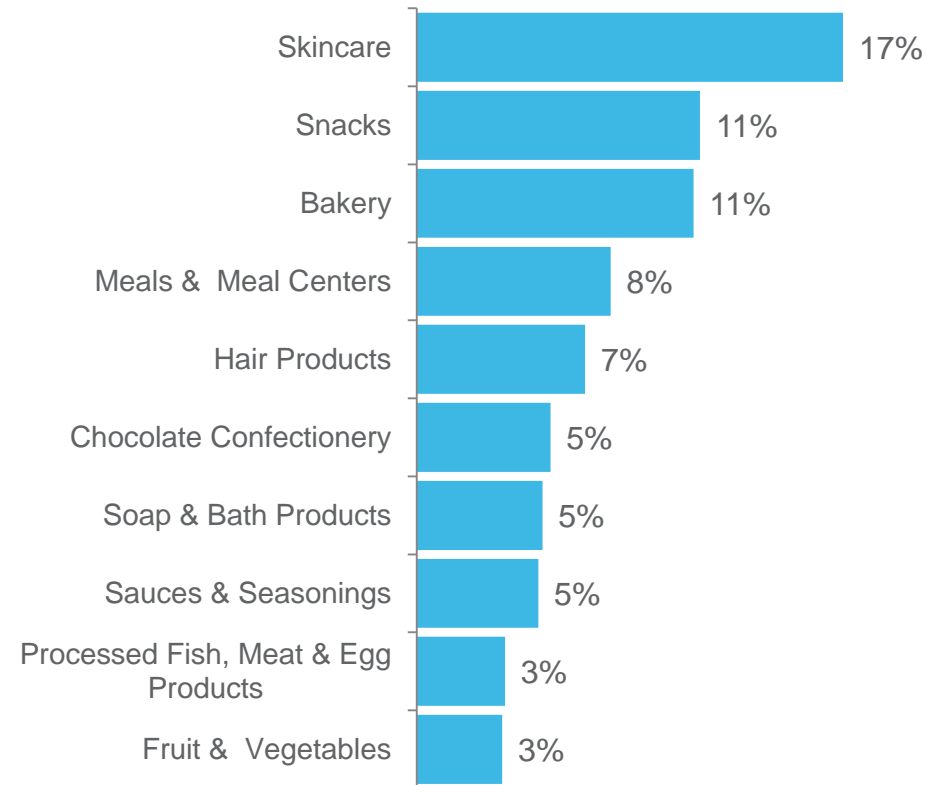
Germany and USA had the greatest number of sweetpotato product launches, consistent with previous waves. The main categories for products were skincare and snacks.

Top Launch Countries



1888
Global
Launches










Top Launch Categories














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

Pack Formats Used

Global		Flexible	30%
		Bottle	15%
		Tube	11%
Europe		Flexible	28%
		Bottle	16%
		Tube	12%
Asia Pacific		Flexible	39%
		Bottle	12%
		Flexible stand-up pouch	11%

Top Claims Used

Global		Botanical/Herbal	24%
		No Additives/Preservatives	21%
		Moisturising / Hydrating	15%
Europe		Botanical/Herbal	27%
		No Additives/Preservatives	19%
		Moisturising / Hydrating	17%
Asia Pacific		No Additives/Preservatives	24%
		Botanical/Herbal	16%
		Microwaveable	13%

Only regions with n >30 are displayed

»»» Innovative Sweetpotato Launches: L3M (October 2016 – January 2017)

Chef Bombay Vegetable Pakoras with Tamarind Sauce (Canada)

Chef Bombay Vegetable Pakoras with Tamarind Sauce are described as a bite size vegetable fritters with the finest Indian spices served with own tamarind dipping sauce. This medium spiced product is made with only the best and all natural ingredients, and is said to be suitable for vegans. It retails in a 250g pack containing 10 units, and features the Instagram, Facebook and Twitter logos.



Claims:
All Natural Product, Vegan, No Animal Ingredients, Social Media

Mister Potato Sweet Potato Crisps (Malaysia)

Mister Potato Sweet Potato Crisps are made from 100% imported sweet potato goodness without added artificial colours. This cholesterol-free and halal certified product retails in a 130g pack.



Claims:
No Additives/Preservatives, Low/No/Reduced Cholesterol, Halal

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. The microwaveable product contains 14g protein, and is made with 100% natural chicken and garden vegetables. It retails in a 9.5-oz pack bearing the Facebook and Twitter logos, and heating instructions.



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

Seneca Sea Salt Sweet Potato Chips (USA)

Seneca Sea Salt Sweet Potato Chips have been repackaged in a newly designed 2.5-oz. pack, featuring a QR code. This crunchy and delicious kosher certified product is gluten free, rich in beta carotene and loaded with vitamin A. The chips are all natural and a good source of fiber.



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

➤➤➤ Innovative Sweetpotato Launches: L3M (October 2016 – January 2017)

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

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



Claims:

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

Arla Big Yogs Rascal Raspberry with Bold Beetroot & Mischievous Mango with Smashing Sweet Potato Yogurts (UK)

Arla Big Yogs Rascal Raspberry with Bold Beetroot & Mischievous Mango with Smashing Sweet Potato Yogurts are available. This product is described as fruit and vegetable yogurts bursting with goodness that are smoothly blended with no bits. It is enriched with essential nutrients such as vitamin D and natural source of calcium, which are needed for normal growth and development of bones in children.



Claims:

Vegetarian, Children (5-12), Vitamin/Mineral Fortified, Bone Health, Ethical - Environmentally Friendly Product, Ethical - Animal, Ethical - Charity

No Brand Sweet Potato Chips (South Korea)

No Brand Sweet Potato Chips are made with 19% sweet potato, 0.5% honey and 0.8% black sesame. This economy product is crispy and retails in a 205g pack.



Claims: Economy

Dee's Tex-Mex Style Veg Pot (Sweden)

Dee's Gryträtt med Bönor, Paprika och Sötpotatis (Tex-Mex Style Veg Pot) is a bean and sweet potato chilli meal with a vegetable content of 63%. The heat and eat product is suitable for vegans, cooks in a microwave in five minutes, and retails in a 400g pack bearing the Facebook and Twitter logos.



Claims:

Microwaveable, Vegan, Ease of Use, No Animal Ingredients, Social Media

»»» Innovative Sweetpotato Launches: L3M (October 2016 – January 2017)

Danone Oikos Pumpkin & Sweet Potato Yogurt (Japan)

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



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

Plecia Watashi No Shifuku Mocchiri Shake Purple Sweet Potato Dessert (Japan)

Plecia Watashi No Shifuku Mocchiri Shake Purple Sweet Potato Dessert is now available. This product contains chewy jelly topped with custard whipped cream, a sponge and purple sweet potato cream. It retails in a single unit pack. Launched on October 1, 2016 with an RRP of 216 yen.



Claims:
N/A

Fujipan Sweet Potato Petit Roll Cake (Japan)

Fujipan Sweet Potato Petit Roll Cake has been relaunched. This is a soft cake filled with rich annou sweet potato paste and vanilla cream. The product retails in a pack containing six units. Launched on September 1, 2016, open-priced.



Claims:
N/A

Athletica Pro Series 100% Pure Sweet Potato (Brazil)

Athletica Pro Series Batata Doce 100% Pura (100% Pure Sweet Potato) is described as a low glycemic carbohydrate. The gluten free product is an energy supplement for athletes and has no added flavoring. It is and retails in 900g pack featuring a QR code.



Claims:
No Additives/Preservatives, Low/No/Reduced Glycemic, Gluten-Free, Low/No/Reduced Allergen, Energy (Functional)



Australian Sweetpotato Launches: L3M (October 2016 – January 2017)

Heinz Beef Bolognese with Vegetables

Heinz Beef Bolognese with Vegetables is suitable for babies from eight months old onwards. The steam cooked pureed product is made with six types of vegetables and free from artificial colours, flavours, preservatives, added salt and sugar. This product can be served warm or cold by simply squeezing the baby food into a bowl or onto a spoon. It retails in a 120g pack, bearing the Facebook logo.



Claims:

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

The Real Hotpot Aussie Angus Beef & Ale

The Real Hotpot Aussie Angus Beef & Ale is a heat and eat product that is ready in four minutes. The microwaveable product contains no artificial colours or flavours and retails in a 350g pack.



Claims:

No Additives/Preservatives, Microwaveable, Ease of Use

The Real Mash Vegetable Mash

The Real Mash Vegetable Mash is made from vegetables and potatoes. The product can be heated in five minutes in the microwave, contains no artificial colours or flavours and retails in a 450g pack.



Claims:

No Additives/Preservatives, Microwaveable

Campbell's Simply Soup Warming Orange with Chickpeas Soup

Campbell's Simply Soup Warming Orange with Chickpeas Soup is 98% fat free and is described as a superfood containing over four serves of vegetables per pack. This vegetarian suitable product contains no artificial colours or flavours, is ready to serve and microwaveable, features a Health Star Rating of four, and retails in a 500g pack featuring serving suggestions.



Claims:

No Additives/Preservatives, Low/No/Reduced Fat, Microwaveable, Vegetarian, Ease of Use



In the Media.

General Vegetable News (October 2016 – January 2017)

- Free trade agreements secured with China, Japan and South Korea have markedly increased fresh fruit and vegetable exports.
- According to new research by market research analyst IBISWorld, Australian fruit and vegetable exports to Asia, particularly to countries that have FTAs with Australia, will continue to enjoy healthy growth over the next five years and well into the future as Australia positions itself as a major food supplier for increasingly wealthy Asian consumers.
- IBISWorld senior industry analyst Sam Johnson said although many tariffs would remain for some years, Australian farmers had been busy forging supply links with wholesalers and retailers across China, Japan and South Korea.
- “According to IBISWorld, exports of vegetables will generate \$303.7 million in 2016-17,” Mr Johnson said. “Asparagus exports to South Korea have driven some growth over the last five years, rising in value by 123 per cent between 2014 and 2015. “Other vegetables that have been successful in China, Japan and South Korea under the FTAs include lettuces, broccoli and broccolini, beans, spinach, cabbage, cauliflower, celery and peas.”
- The total value of Australian vegetable exports to China alone increased from \$570,000 in 2014-15 to \$17.2 million in the following year.



Commodity News

(October 2016 – January 2017)



- A gardening expert is urging Cairns gardeners to make the most of the rain and harvest fresh Asian vegetables.
- Limberlost Nursery and Garden Centre horticulturist Damien Heath said feeding plants with pelletised fertiliser would yield the best crops under the current showers.
- “You want to stay away from traditional vegetables, like carrots and tomatoes, and instead go for Asian vegetables which thrive in the rain.” He said rain promoted rapid growth of plants, so they only needed a little bit of encouragement to grow quickly.
- “They will need food for that growth, but a little bit of pelletised fertiliser will do the trick there,” he said.

www.cairnspost.com.au



- The Perth metropolitan area has been declared an agricultural quarantine zone to prevent a destructive plant pest from spreading.
- Until the end of June, commercial producers can't move host plants or any machinery, equipment, soil or gardening items used with a host plant out of the quarantine area.
- Shaun Lindhe from Ausveg said the pest was first detected in New Zealand a decade ago, and it had cost an estimated \$60 million each year for growers to manage it.
- The psyllid attacks a range of plants including potato, sweet potato, tomato, eggplant, capsicum, chilli and tamarillo, and is a significant production pest in the US, Central America and New Zealand.

www.9news.com.au



- If you've been cutting a small cross in the base and then boiling, you've been destroying the flavour of the sprout, according to expert Matthew Rawson.
- The chairman of the Brassica Growers Association said steaming, stir-frying or microwaving are a better option.
- He also credits a renewed interest in the dish with recipes that include pancetta or chestnuts. He said, 'Boiling them was traditionally the way of doing it, but putting the cross in puts in too much water.'

www.metro.co.uk



- Researchers are using spinach as a bomb detector which relays warnings to humans via their smartphones.
- Marking the first time a plant has ever exchanged information with a phone, researchers said the findings opened the door to using plants as defence mechanisms and even identifying threats of terrorism.
- A team of scientists from the Massachusetts Institute of Technology (MIT) embedded carbon nanotubes in the plant's leaves which emitted a signal when they detected nitroaromatics — a chemical compound used in landmines and other explosives.

www.abc.net.au

Commodity News

(October 2016 – January 2017)



- While prices may not compare to those UK consumers are currently experiencing for certain fresh produce, Queensland shoppers are also seeing increased prices due to heavy rains and a hot summer.
- Cauliflower and asparagus are the most expensive but some alternatives are on the cheap including, beetroot, capsicum, carrot, celery, silverbeet, onions and pumpkin.
- Shoppers in Queensland can also expect to pay more for quality parsnips, beans, Brussels sprouts, cabbage, eggplant, fennel, leeks, snow peas, squash, sweet corn, zucchini, mushrooms, potatoes and sweet potatoes.

www.freshplaza.com



- Coles Supermarkets has issued a recall for a home-brand beetroot dip.
- The Coles brand Beetroot Dip 200g was sold in Coles and Bi-Lo supermarkets in Queensland, Coles supermarkets in northern New South Wales and Coles Online.
- Only packages with a best-before date of January 9, 2017, are affected.
- Coles said the recall was due to the presence of an allergen — sesame — which had not been specified on the package, as it had been incorrectly packaged in a Coles Spicy Capsicum Dip container. Consumers with an intolerance or allergy to sesame could have an adverse reaction.

www.news.com.au



- Rising incomes and a growing middle class in China are fuelling demand for Western-style breakfast items such as butter, cream and cheese, says Fonterra.
- To meet demand, Fonterra has boosted the availability of its Anchor Dairy Foods' product range.
- It also launched a mobile app campaign inviting users to share their favourite breakfast recipes using various dairy ingredients.
- Around 70 per cent of the recipes shared were Western-style dishes such as breakfast paninis and omelettes, while 30 per cent were Chinese-inspired dishes such as sweet potato cream soup, toast rolls with peanuts, and cheese and egg breakfast cups.

www.newfoodmagazine.com



Project Harvest Background & Methodology.



Background & Setting the Scene.

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

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

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

This wave's report (Wave 44, January 2017) focuses on:

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

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





Online Methodology.

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

General Respondent Questions

Demographics

Vegetable Consumption

1/7 Commodities

Commodity Specific Questions

Category Health

Purchase & Consumption Habits

Price Perceptions & Average Spend

Triggers/Barriers to Purchase

Preparation Preferences

+ 2 Ad hoc Questions per Month





Sample.

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

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

To qualify for the questionnaire, respondents...

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

	Asian Vegetables n=300	Capsicum n=303	Brussels Sprouts n=301	Spinach n=301	Parsnip n=202	Beetroot n=202	Sweetpotatoes n=209
Gender							
Male	39%	44%	42%	35%	46%	47%	39%
Female	61%	56%	58%	65%	54%	53%	61%
Age							
18-24 y.o.	3%	5%	2%	7%	1%	5%	5%
25-34 y.o.	19%	19%	15%	24%	10%	16%	15%
35-44 y.o.	22%	17%	17%	20%	7%	18%	19%
45-54 y.o.	19%	18%	20%	21%	20%	18%	21%
55-64 y.o.	19%	21%	21%	14%	30%	19%	16%
65+ y.o.	18%	19%	26%	15%	32%	23%	23%
Household							
Single Income no Kids	16%	19%	21%	19%	16%	17%	17%
Double Income no Kids	22%	18%	17%	21%	21%	21%	17%
Young Families	17%	14%	14%	22%	6%	16%	13%
Established Families	22%	25%	21%	25%	19%	22%	24%
Empty Nesters	23%	23%	27%	14%	39%	24%	28%
Location							
New South Wales	18%	17%	15%	20%	11%	23%	18%
Victoria	16%	14%	21%	19%	17%	21%	15%
South Australia	19%	18%	20%	19%	20%	12%	18%
Queensland	21%	14%	20%	13%	12%	17%	20%
Western Australia	18%	22%	19%	19%	17%	13%	20%
Tasmania	2%	7%	2%	4%	19%	9%	5%
Australian Capital Territory	4%	6%	2%	4%	2%	4%	3%
Northern Territory	1%	1%	1%	1%	1%	0%	0%



Trends Research: Our Approach

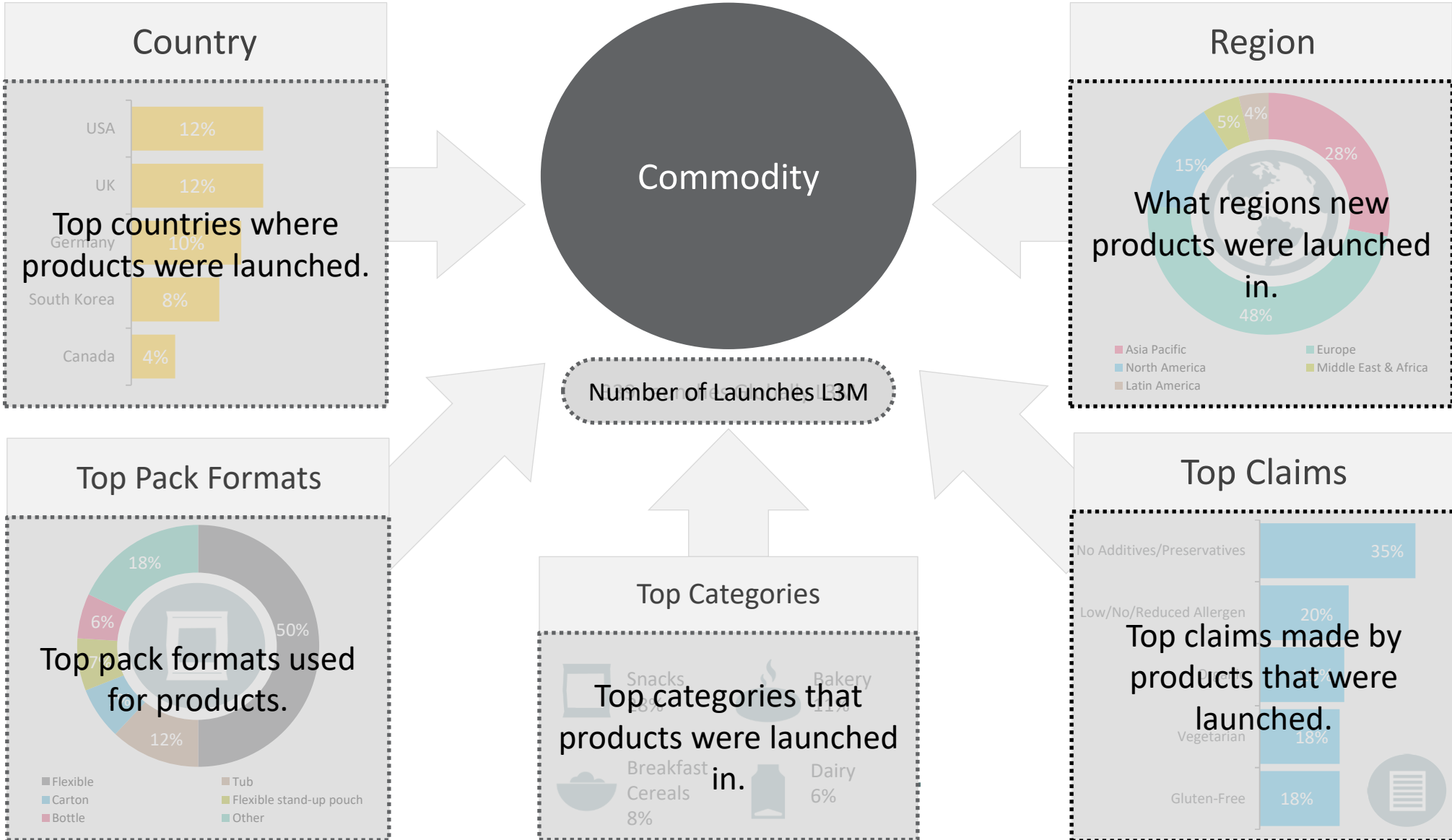


- ▶ Colmar Brunton has used a combination of both desk research and in the field market research to explore the trends for each vegetable commodity being tracked this month.
- ▶ Our main source of secondary data for this report was collected from Mintel Global New Products Database (GNPD).
- ▶ This data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

Product Launches Last 3 Months (L3M)

How to Read Summaries

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





Thanks.

