Monthly Tracker Report, Wave 14 2014

Commodities Tracked: Broccoli, Chillies, Lettuce & Sweet Corn

Prepared by: Denise Hamblin, Stuart Todd, Phillip Sargeant & Fiona McKernan

colmar brunton.

Contents

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.

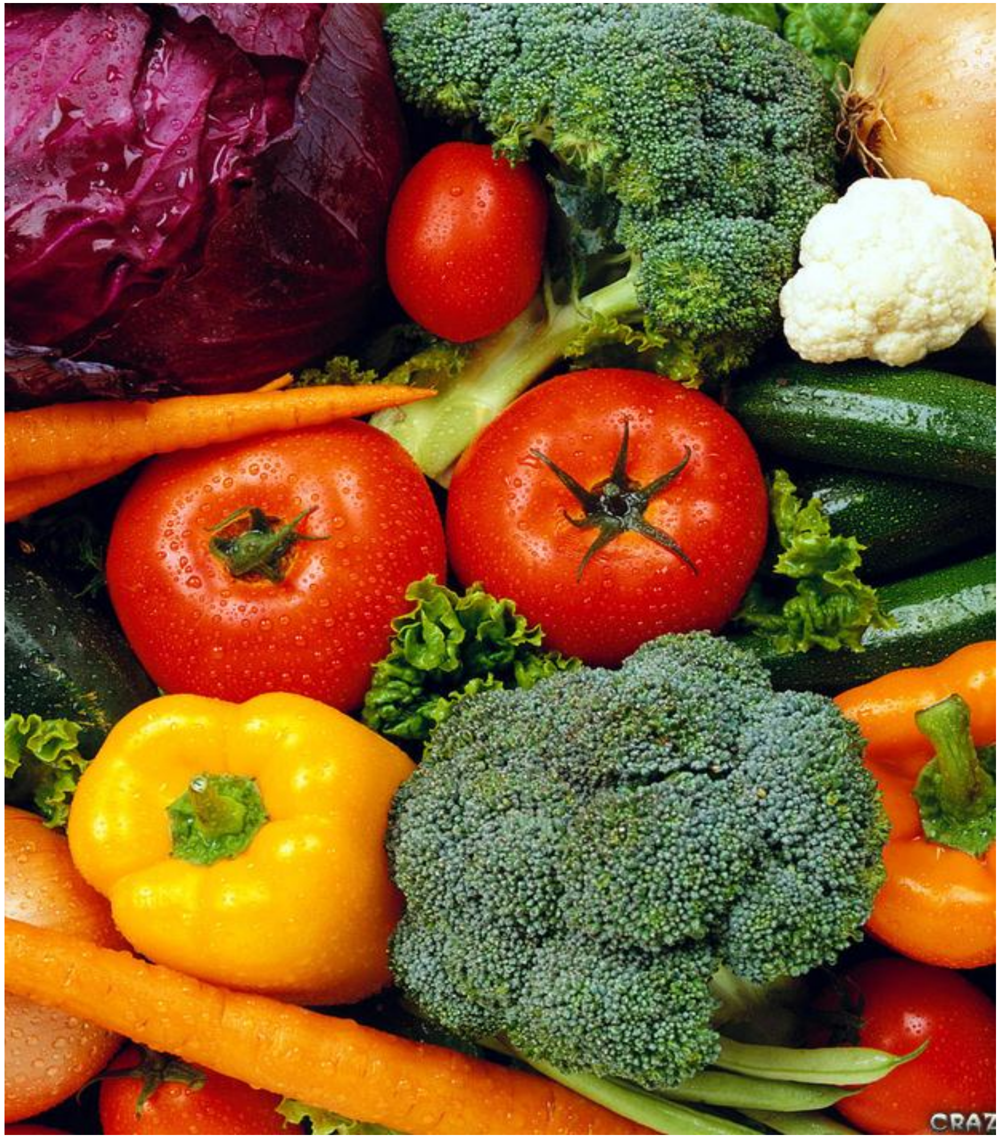
Colmar Brunton has been commissioned to conduct a monthly on-line tracking project following specified vegetables across a three year period; monthly trend analysis; and additional ad-hoc projects to assist in this understanding of consumers.

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 14, July 2014) focuses on:

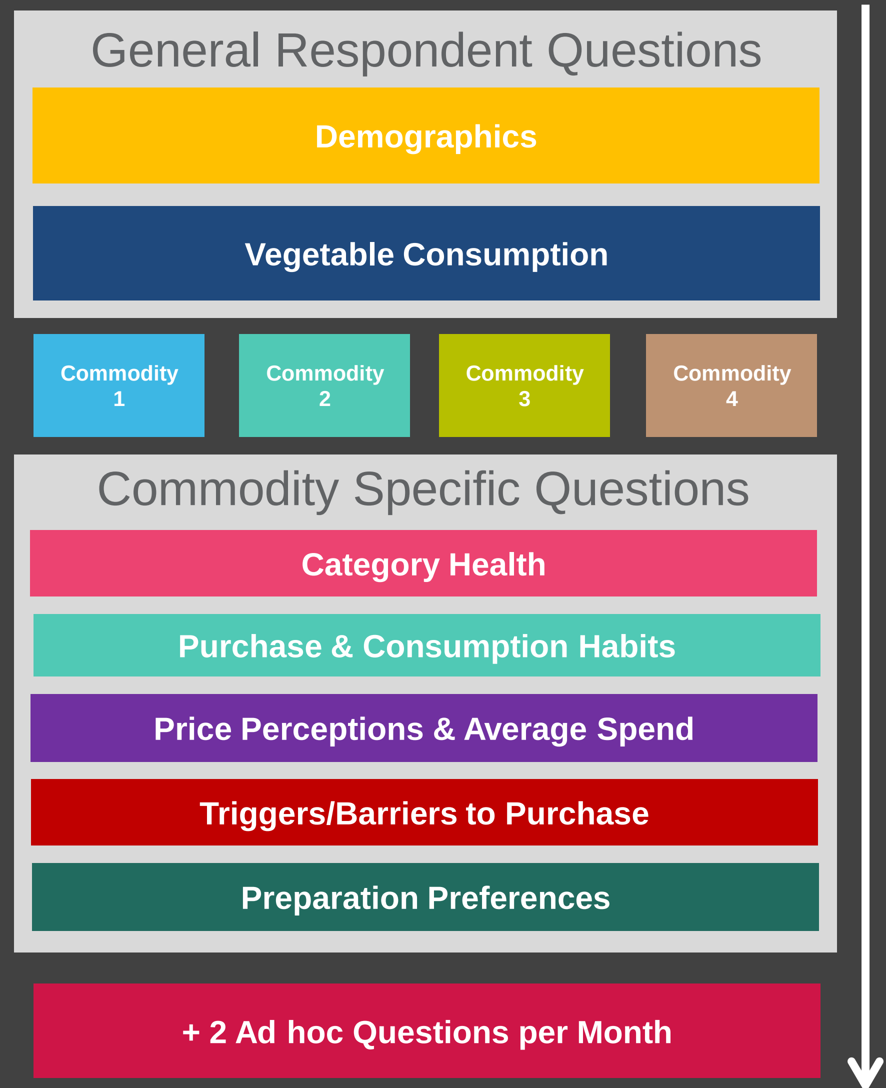
- Broccoli
- Chillies
- Lettuce
- Sweet Corn

Essentially this is the fourth wave of tracking for these specific commodities. The current report will bring to light any change over the past twelve months.



Online Methodology.

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



Sample.

In total, 601 respondents completed the questionnaire. 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 fortnight
- ⇛Purchased at least one of the monthly commodities (Broccoli, Chillies, Lettuce and Sweet Corn) within the last month
- ⇛Were the main or joint grocery buyer

	Total N=601	Broccoli n=314	Chillies n=261	Lettuce n=315	Sweet Corn n=308
Gender					
Male	36%	31%	43%	28%	33%
Female	64%	69%	57%	72%	67%
Age					
18-24 y.o	7%	9%	7%	10%	7%
25-34 y.o	21%	17%	28%	21%	21%
35-44 y.o	21%	19%	21%	19%	21%
45-54 y.o	18%	18%	20%	17%	19%
55-64 y.o	20%	23%	15%	20%	19%
65+ y.o	13%	14%	10%	13%	13%
Household					
Single Income no kids	14%	14%	13%	14%	12%
Double Income no kids	21%	20%	26%	17%	19%
Young Families	19%	17%	18%	20%	22%
Established Families	28%	29%	28%	30%	29%
Empty Nesters	19%	19%	15%	18%	19%
Location					
New South Wales	26%	20%	32%	20%	26%
Victoria	22%	18%	28%	18%	18%
South Australia	14%	19%	8%	18%	15%
Queensland	19%	18%	15%	20%	19%
Western Australia	13%	16%	11%	17%	16%
Tasmania	3%	4%	3%	4%	2%
Australian Capital Territory	3%	4%	2%	3%	4%

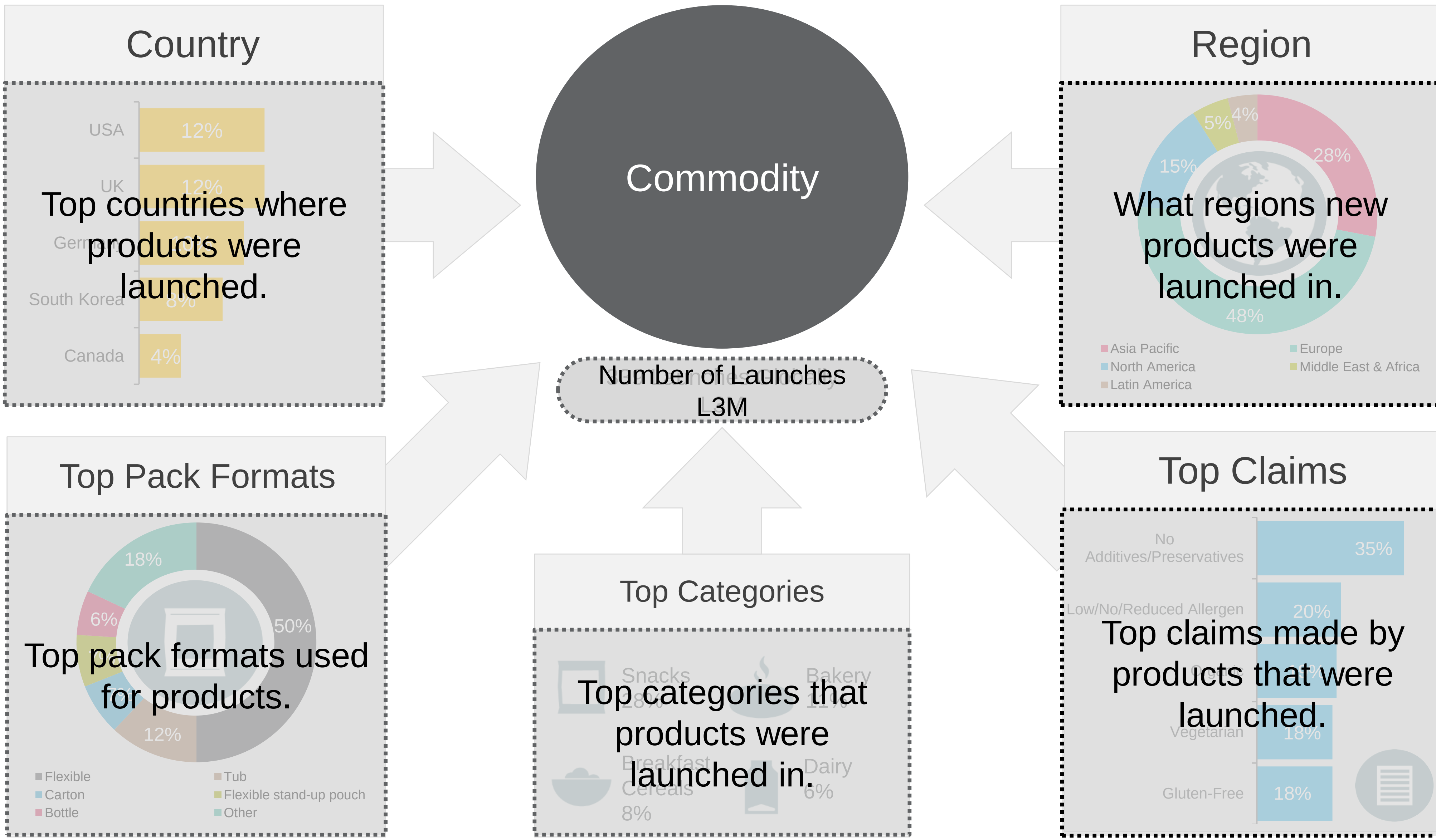
**Please note the lower number of chilli consumers is due to low incidence of purchase in the last month*

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 4 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.



Wave 14:
Executive Summary

Broccoli Grower Action Plan

40% Of consumers don't buy broccoli more often because they consume enough for their needs.

1.

Insight:

Consumption of broccoli has been increasing, as has price. However perceived value for money and future purchase intent has declined.

Recommendation:

Clearly indicate reasons for price rise to reduce risk of alienating broccoli consumers.

2.

Insight:

Carrots and potatoes are consistently the most consumed combination with broccoli.

Recommendation:

Explore possibility of co-packaging with differing vegetables, including carrots and potatoes, to increase repertoire and ensure future use.

3.

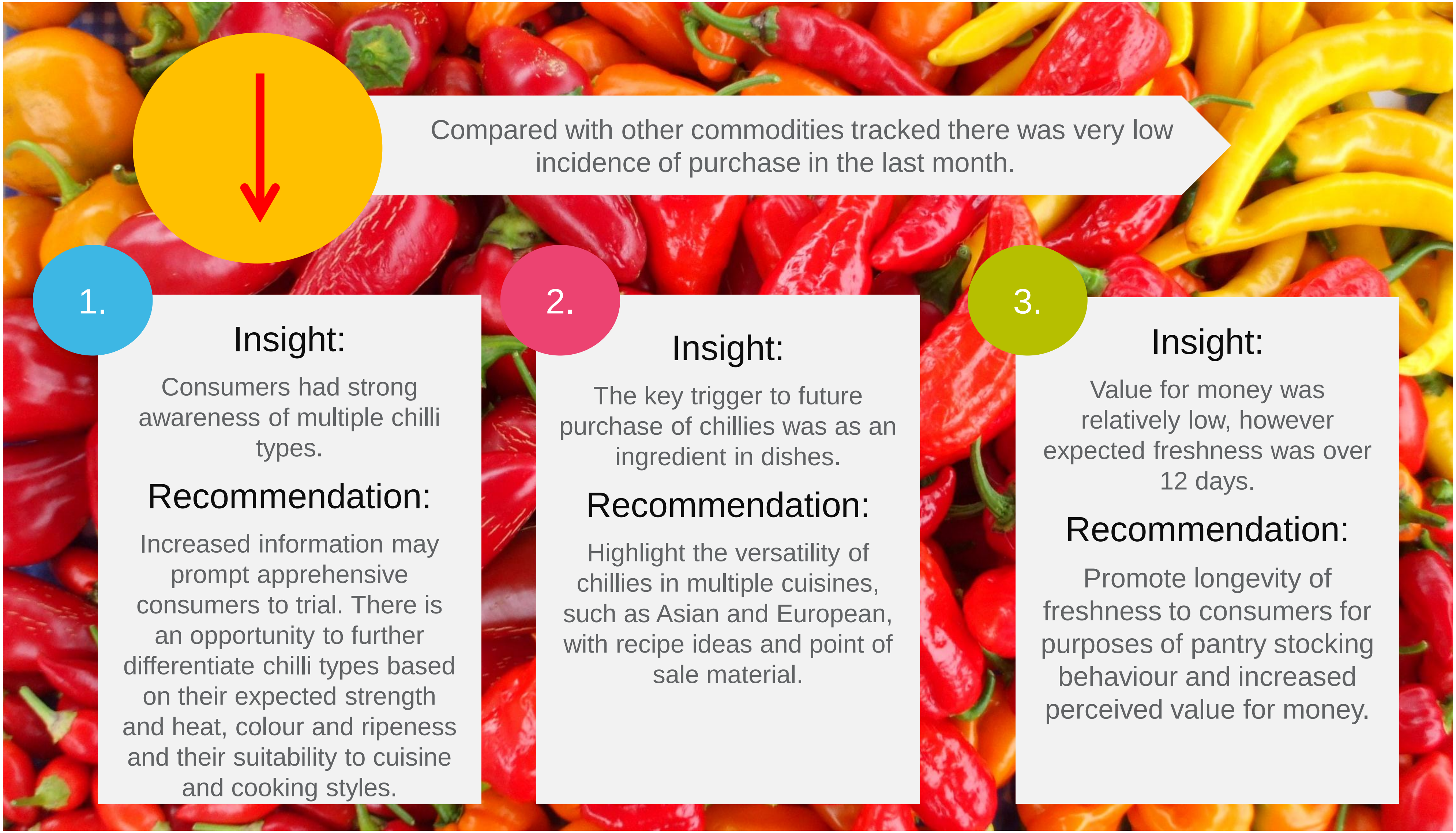
Insight:

Australian and Chinese cuisine are consistently the most common to use broccoli.

Recommendation:

Celebrate the cultural versatility of broccoli in advertising to encourage cross cuisine consumption.

Chillies Grower Action Plan



Compared with other commodities tracked there was very low incidence of purchase in the last month.

1.

Insight:

Consumers had strong awareness of multiple chilli types.

Recommendation:

Increased information may prompt apprehensive consumers to trial. There is an opportunity to further differentiate chilli types based on their expected strength and heat, colour and ripeness and their suitability to cuisine and cooking styles.

2.

Insight:

The key trigger to future purchase of chillies was as an ingredient in dishes.

Recommendation:

Highlight the versatility of chillies in multiple cuisines, such as Asian and European, with recipe ideas and point of sale material.

3.

Insight:

Value for money was relatively low, however expected freshness was over 12 days.

Recommendation:

Promote longevity of freshness to consumers for purposes of pantry stocking behaviour and increased perceived value for money.

Lettuce Grower Action Plan

?

There is variability in the perceived longevity and freshness of lettuce across the three waves.

1.

Insight:

Expectations of longevity of freshness is increasing, however expectations of freshness being met have decreased compared with November 2013.

Recommendation:

Manage consumers expectations of longevity of freshness with best before dates and storage instructions on lettuce packaging.

2.

Insight:

Short shelf life is the main barrier to future purchase of lettuce.

Recommendation:

Investigate and/or promote varieties of lettuce that are hardy in off-peak seasons (winter months) and that have a longer shelf life.

3.

Insight:

July saw a decrease in consumer consumption frequency and the perceived value for money.

Recommendation:

In winter months salads, and therefore lettuce are consumed less frequently. Inform consumers of winter dishes using lettuce, such as stir-fries to increase consumption occasions and in conjunction value for money perceptions.

Sweet Corn Grower Action Plan

20% Of consumers indicated that they don't purchase sweet corn more often because they want variety of their vegetables.

1.

Insight:

The last three waves have seen an increase in longevity of freshness and expectations being met.

Recommendation:

Promote pantry stocking behaviour of sweet corn, highlighting the expected freshness.

2.

Insight:

Value for money is down in winter months (out of peak season).

Recommendation:

Capitalise on longevity of freshness in winter months to negate negative perceptions of value.

3.

Insight:

Increased purchase of individual sweet corn cobs across waves.

Recommendation:

The average number of cobs purchased per shop is 3-4. Promote bundle offers of 3-4 cobs of corn, which may increase purchase frequency.

Wave 14: Fact Base
(1 of 2)

Broccoli:

- The average volume purchased for broccoli has increased to 800g from 700g in the previous two waves.
- Individual broccoli was the most common format purchased across all waves tracked. This format has increased in popularity compared with previous waves.
- Broccoli was purchased on average 4.6 times per month and consumed 10.1 times, both an increase from the previous two waves.
- Average recalled last spend was $3.70, which represents a steady upward trend from previous waves. Broccoli was perceived to be moderate value for money (5.9/10), which is a decrease from previous waves.
- Overall awareness of broccoli types remained low, with 59% of respondents unable to recall a variety.
- The key triggers to purchase were health/nutrition benefits and variety of diet. Whereas already consuming enough for their needs was the key barrier to purchase.
- Broccoli was primarily used in Australian and Chinese cuisine, which has been consistent across waves.

Chilli:

- Chillies were purchased on average 3.6 times per month and consumed 12.0 times per month. The key retailer for purchase was Woolworths.
- Consumers generally purchased 260g of chillies, with recalled last spend $3.70. Overall, chillies were deemed only fair value for money (6.1/10).
- Pricing analysis revealed the average national price for long red chillies was $16.93.
- There was good recall of multiple varieties of chillies, with jalapeno, birds eye and habanero having the highest awareness. Over a third of respondents could not recall a variety.
- Main triggers to purchase were as an ingredient in dishes, taste and complementing other meals. The key barriers to purchase were consuming enough for their needs and grow their own.
- Chillies were typically used in Chinese cooking and consumed for dinner across weekdays and weekends.
- Chillies were expected to remain fresh for over 12 days, and this freshness was met most of the time.

Wave 14: Fact Base
(2 of 2)

Lettuce:

- Lettuce was purchased on average 4.7 times per month and consumed approximately 13.0 times per month. Consumption was down on previous waves.
- On average 800g of lettuce was purchased per shop. Recalled last spend was $3.58. Value for money was down, perceived to be only fair (5.7/10)
- Whole lettuce remained the most common format purchased, a single head was typically purchased per shop.
- Price tracking revealed an average price of $2.56 per Iceberg lettuce head. This had slightly decreased compared with March prices.
- There was strong awareness of lettuce types. Iceberg and Cos had the greatest recall.
- The key trigger to purchase was health. Convenience and complementing other food were also reasons for purchase. The main barriers to purchase were short shelf life and expense.
- Lettuce was expected to stay fresh for over a week. Expectations of freshness were met most of the time.

Sweet corn:

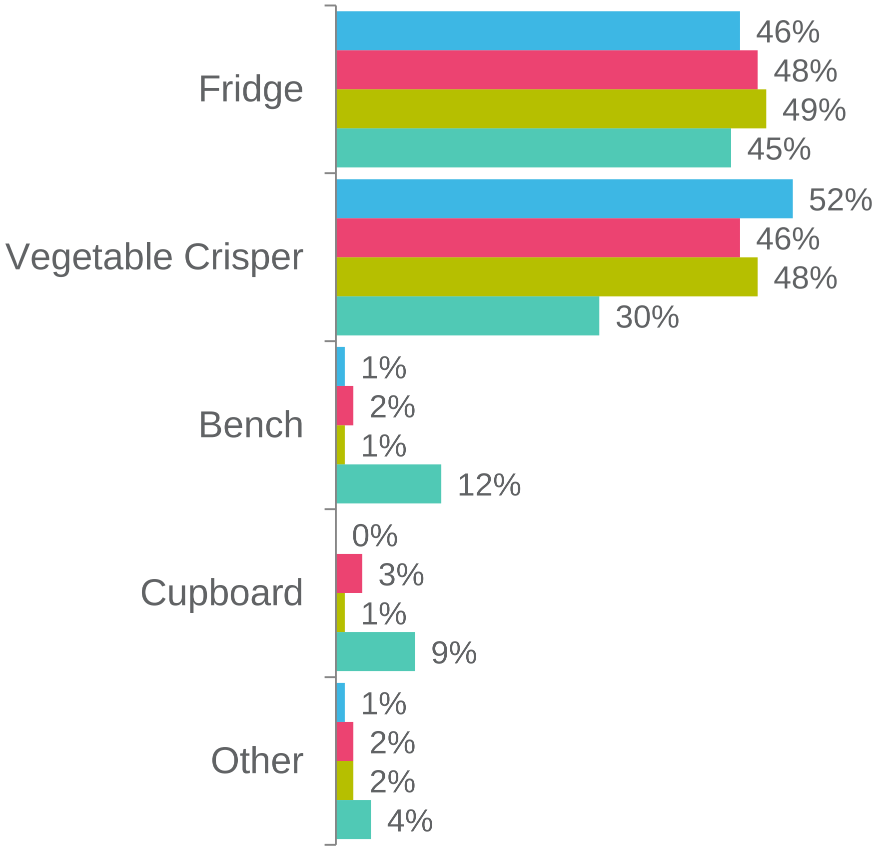
- Purchase frequency of Sweet corn was 3.4 times per month and on average was consumed 6.2 times per month, which were consistent with previous trends.
- 900g of Sweet corn was consistently purchased. Recalled last spend $4.30. Perceived value for money was only fair (6.1/10), which was down on previous waves. Corn was typically purchased as individual cobs.
- Analysis of pricing nationally revealed average price of $1.26 per cob. This was slightly higher than March 2014.
- Awareness of sweet corn remained very low, with three quarters of respondents unable to recall a type.
- Taste remained the key trigger to purchase. Health and variety were also triggers to future purchase. Expense was the main barrier to purchase, up from previous months.
- Sweet corn was generally served with carrots, potatoes and green peas, which was consistent with previous waves.
- Consumers expected sweet corn to remain fresh for 8 days, and this longevity was likely to be met most of the time.

Wave 14:
Ad-Hoc Questions

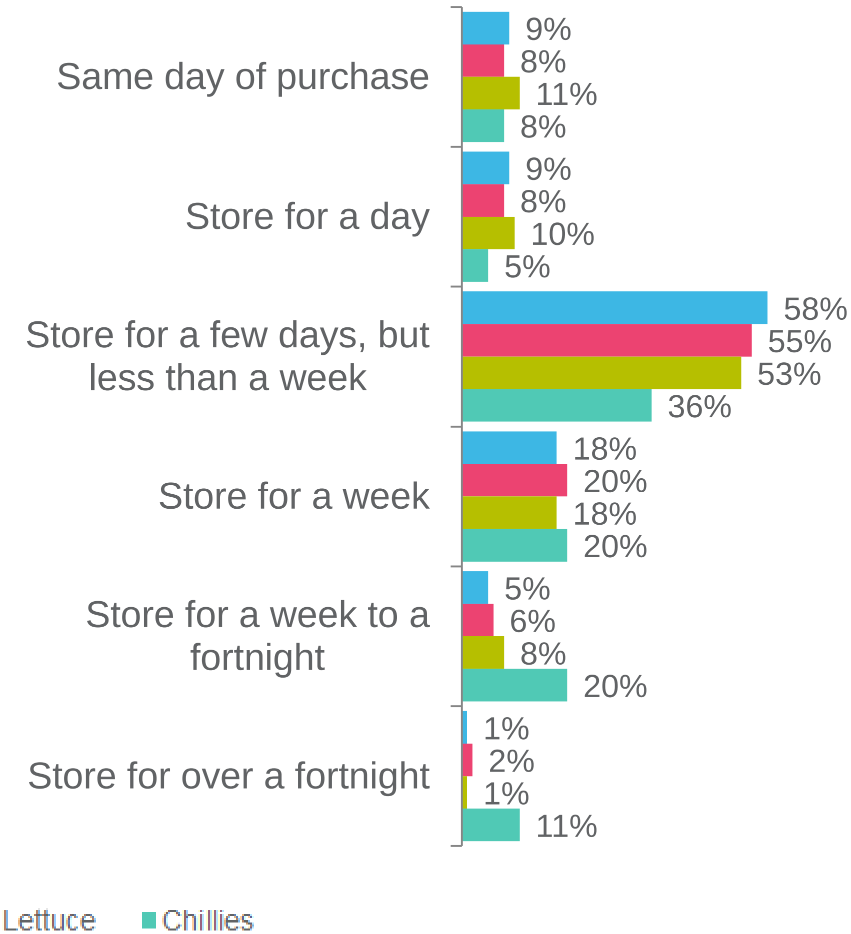
Vegetable Storage

- The fridge and vegetable crisper were the main storage places for broccoli, sweet corn, lettuce and chillies.
- Compared with the other vegetables, chillies were less likely to be refrigerated and more likely to be stored on the bench or cupboard.
- Chillies had the longest storage period, a few days to over a fortnight.
- Broccoli, sweet corn and lettuce were stored on average for a few days, but less than a week.

Place of Storage



Length of Storage

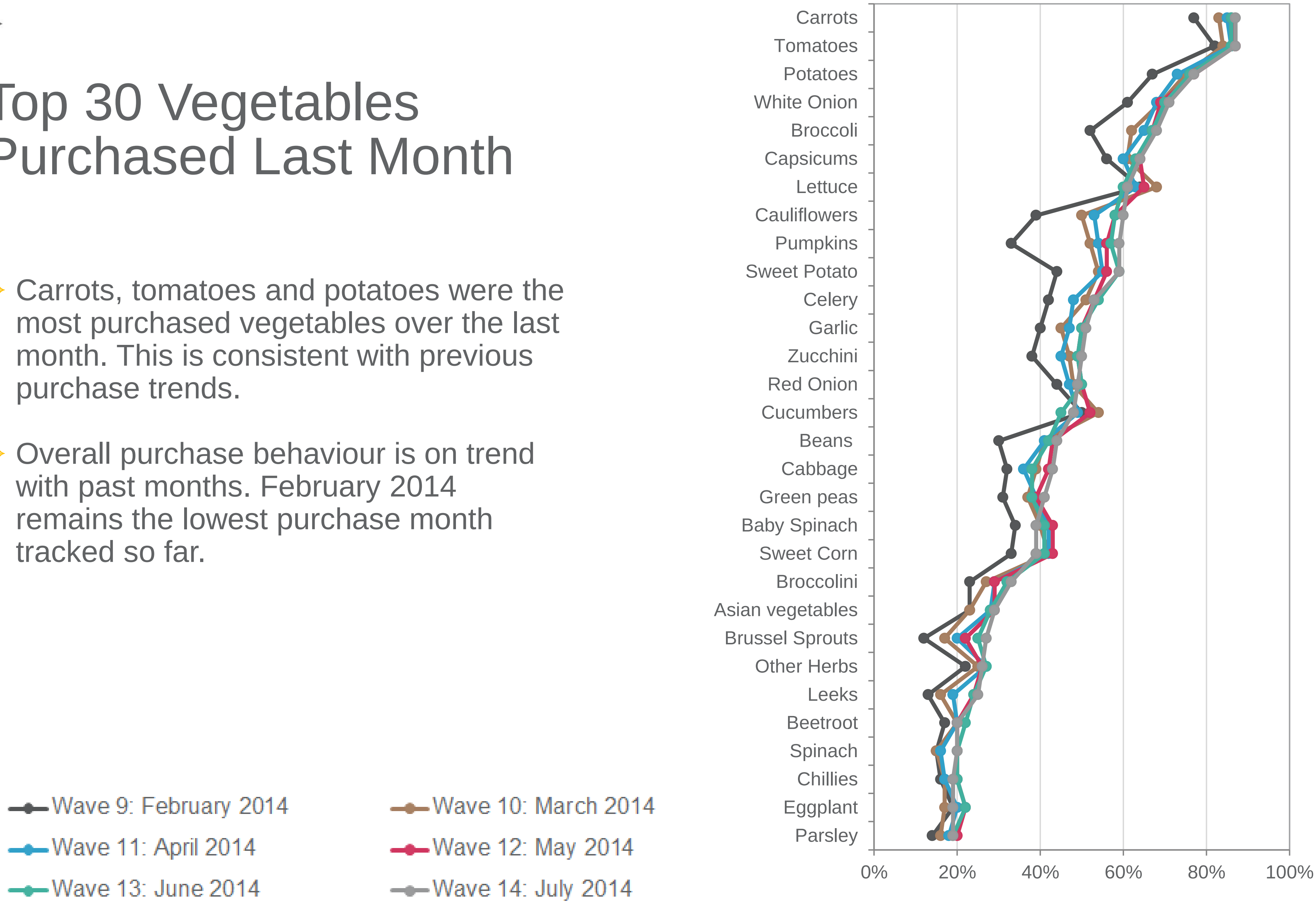


AHQ1. Where do you typically store your vegetables after purchase?
AHQ2. On average, how long to do you store your vegetables before using them?
Total Respondents Min N=480

Wave 14: Overall Vegetable Tracking

Top 30 Vegetables Purchased Last Month

- Carrots, tomatoes and potatoes were the most purchased vegetables over the last month. This is consistent with previous purchase trends.
- Overall purchase behaviour is on trend with past months. February 2014 remains the lowest purchase month tracked so far.



Sample Wave 14 N=1781
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 Mean is the average of all commodities tracked thus far.

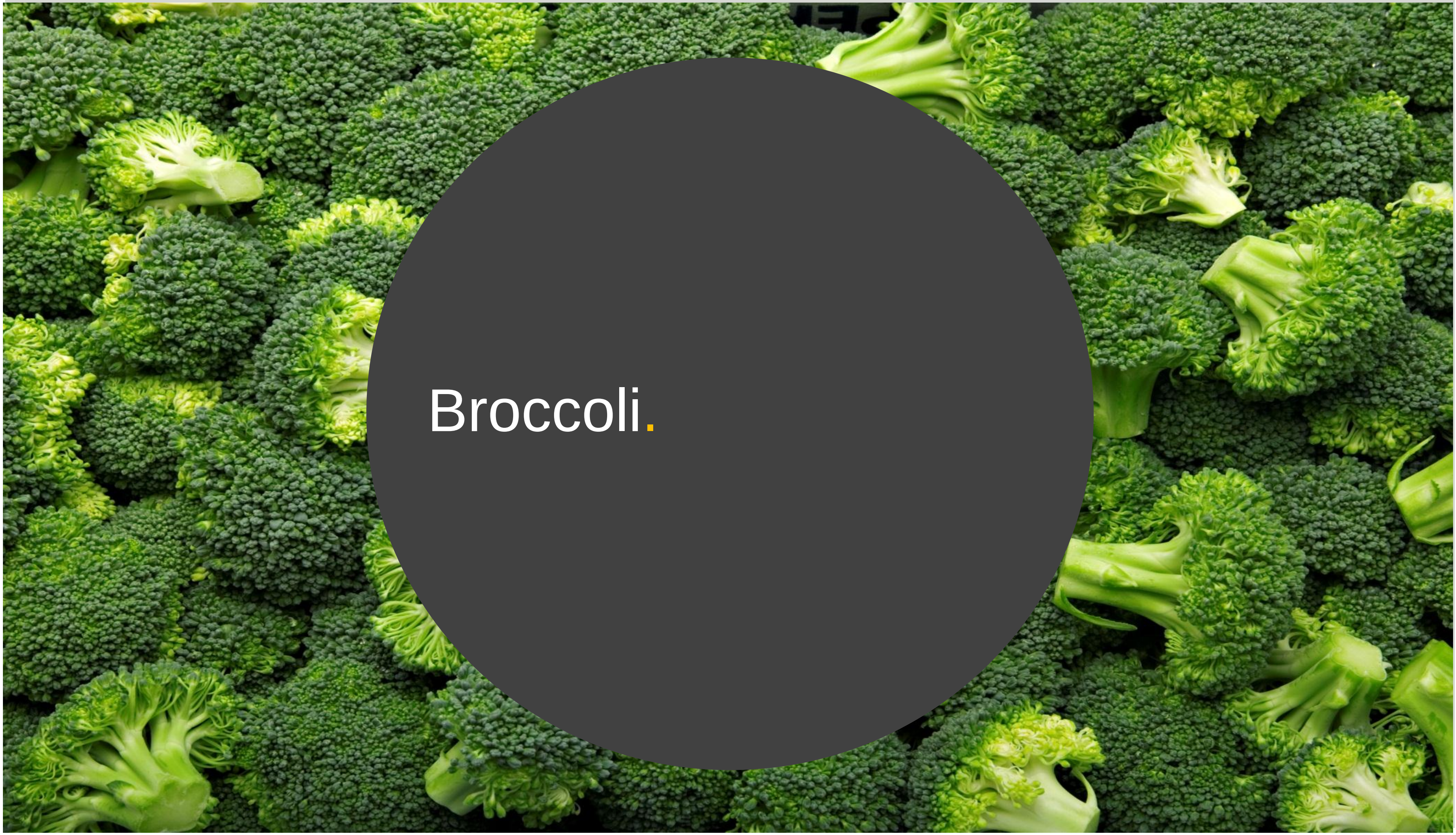
- How **important** to you is having a range of *commodity* available in the store where you usually shop?
- How **satisfied** or dissatisfied are you with the range of *commodity* currently available?
- How likely would you be to **recommend** *commodity* to your family and friends?
- How interested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

Category Health

- Chillies had a strong importance to consumers and held greater interest in new varieties compared with the Harvest mean. However, consumer satisfaction was relatively low. There was strong purchase intent to increase purchase of chillies in the future.
- Broccoli, Lettuce and Sweet Corn had consistent consumer sentiment with the average of commodities tracked thus far. However, broccoli and sweet corn had weaker increased future purchase intent.
- Overall, endorsement of commodities (recommending to families and friends) had the strongest sentiment for consumers.

	Broccoli	Chillies	Lettuce	Sweet Corn	Harvest Total Mean
Importance	6.2	6.8	6.7	6.2	6.3
Satisfaction	6.6	6.2	6.5	6.5	6.6
Endorsement	6.9	6.9	6.6	6.8	6.7
Interest (New Varieties)	5.9	6.9	6.1	6.1	6.1
Future Purchase					
More	11%	17%	15%	11%	14%
Same	88%	81%	83%	86%	85%
Less	1%	2%	2%	2%	2%

Harvest Total Mean is the meal of all commodities from Wave 1, up to and including current wave.


Broccoli.

Purchase and Consumption Behaviour

Average Purchase **4.6** times per month

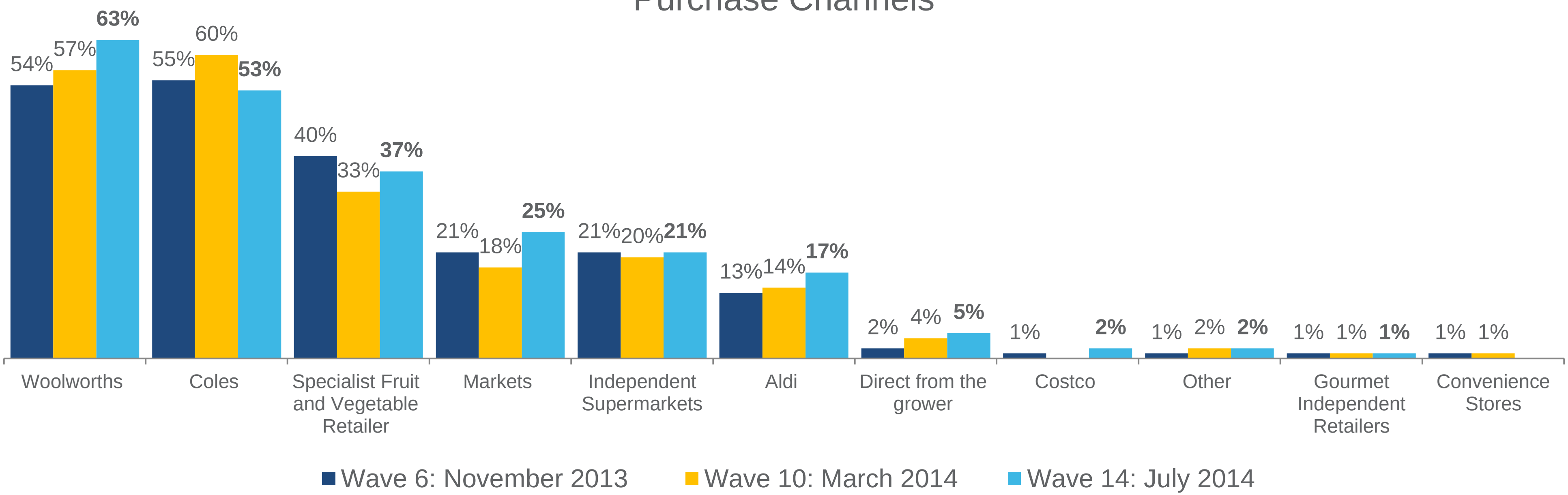
▼ 4.3 times, Wave 6
▼ 4.1 times, Wave 10

Average Consumption **10.1** times per month

▼ 9.9 times, Wave 6
▼ 9.4 times, Wave 10

- Purchase and consumption frequency of broccoli has increased in Wave 14.
- The main channels for broccoli purchase show a moderate upward trend in purchase from Woolworths.

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 6 N=370, Wave 10 N=322, Wave 14 N=314

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

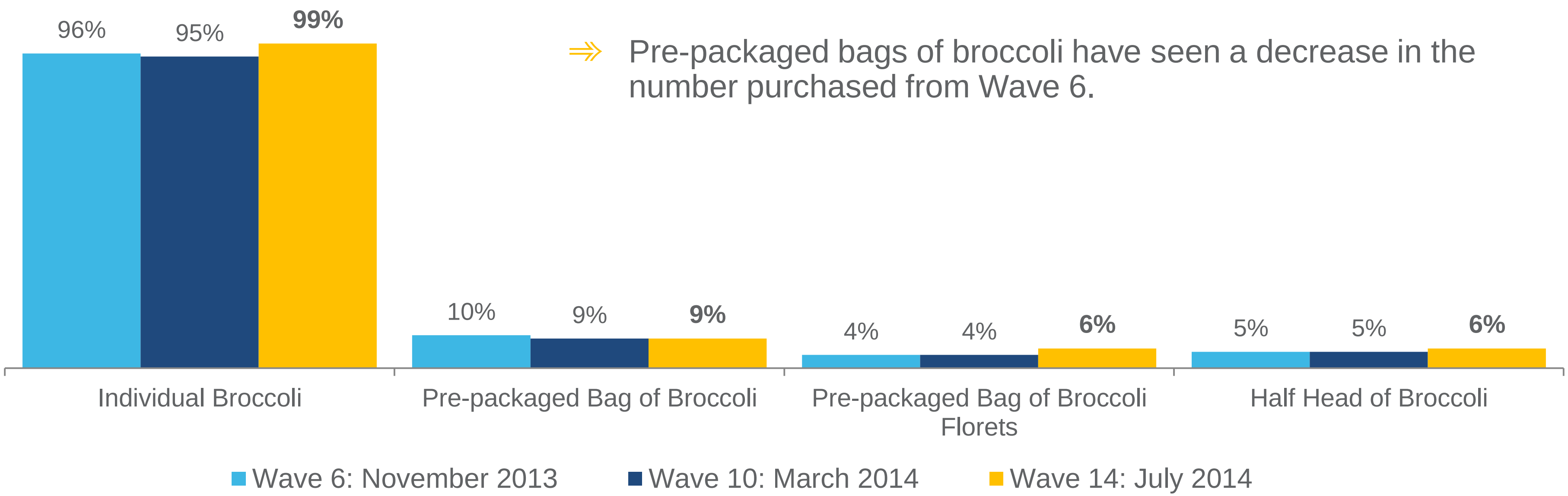
Average Spend and Price Sensitivity

Average weight of purchase	Recalled last spend	Value for money
The average consumer typically purchased **800g** of Broccoli in July 2014, which is an increase from previous waves.	The average recalled last spend was **$3.70** in July 2014, which represents an upward trend.	On average, consumers perceived Broccoli to be fair value **(5.9/10)** in July, which represents a downward trend across waves.
▼ 700g, Wave 6	▼ $3.43, Wave 6	▲ 6.3/10, Wave 6
▼ 700g, Wave 10	▼ $3.52, Wave 10	▲ 6.1/10, Wave 10

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 6 N=370, Wave 10 N=322, Wave 14 N=314

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

Pack Formats Purchased



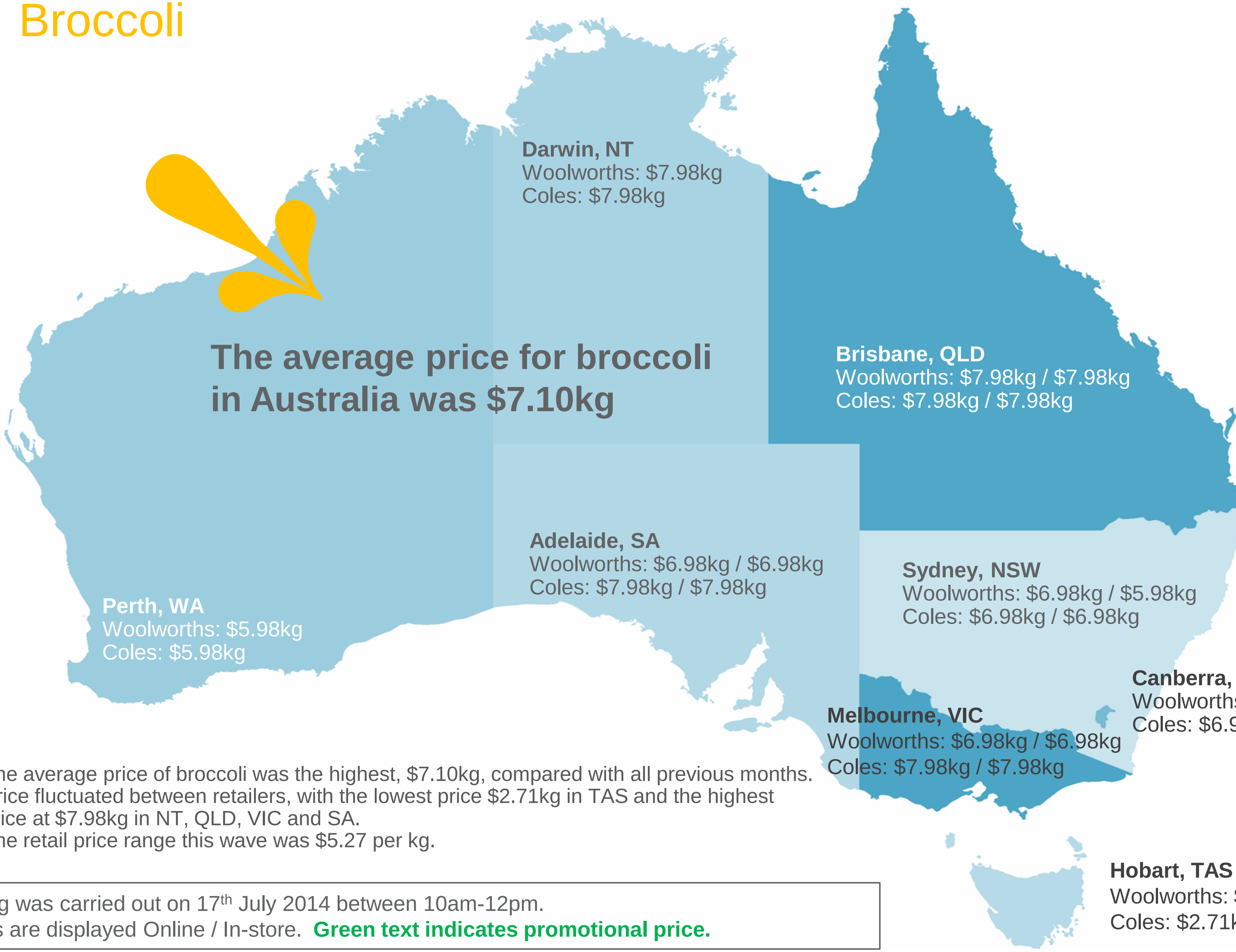
- Wave 14 saw an increase in the proportion purchasing individual broccolis.
- Pre-packaged bags of broccoli have seen a decrease in the number purchased from Wave 6.

Average amount purchased per shop	Individual Broccoli	Pre-packaged Bag of Broccoli	Half Head of Broccoli	Pre-packaged Bag of Broccoli Florets
Wave 6: November 2013	1.9	1.5	1.9	1.7
Wave 10: March 2014	1.9	1.3	1.4	1.5
Wave 14: July 2014	2.1	1.0	1.6	1.4

Q3a. How much <commodity> does this typically equate to?
Sample Wave 6 N=370, Wave 10 N=322, Wave 14 N=314

Online and In-store Commodity Prices

Broccoli

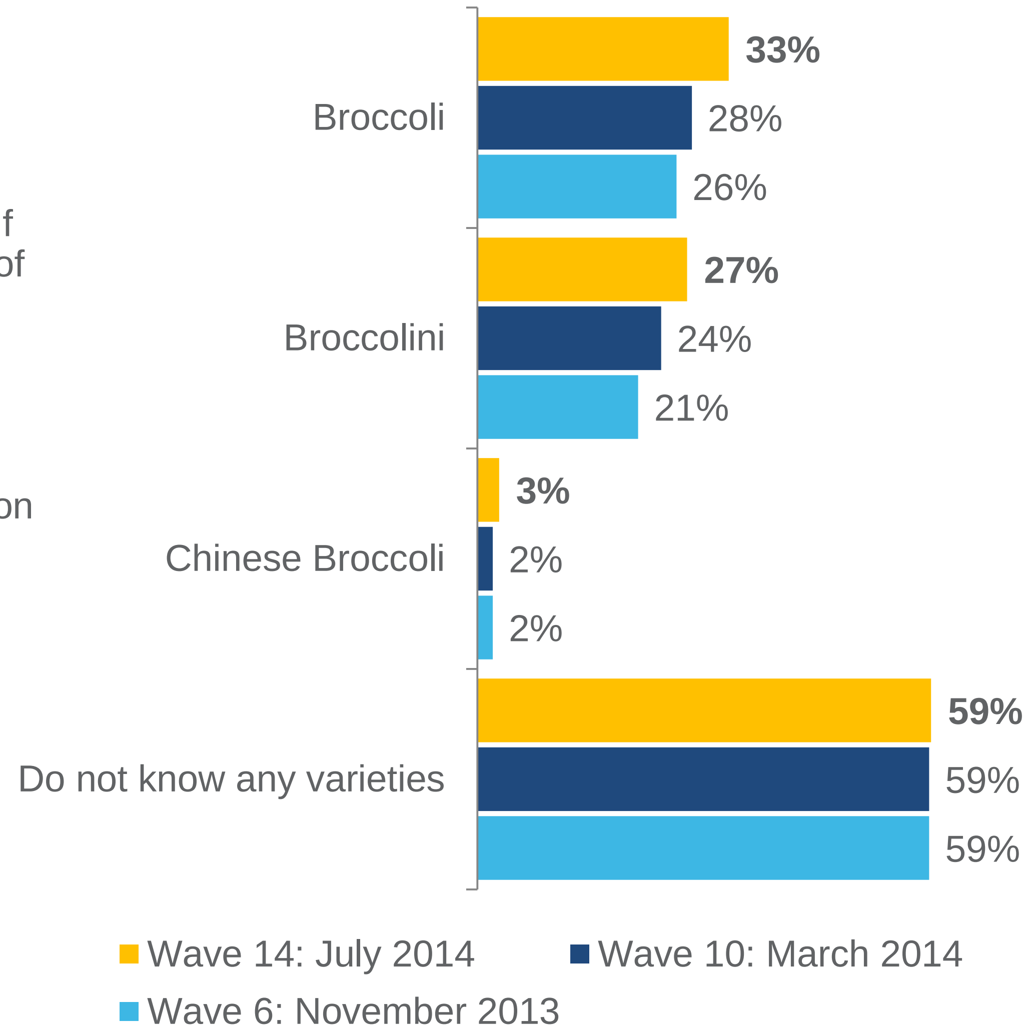


- The average price of broccoli was the highest, $7.10kg, compared with all previous months.
- Price fluctuated between retailers, with the lowest price $2.71kg in TAS and the highest price at $7.98kg in NT, QLD, VIC and SA.
- The retail price range this wave was $5.27 per kg.

Pricing was carried out on 17th July 2014 between 10am-12pm.
Prices are displayed Online / In-store. **Green text indicates promotional price.**

Spontaneous Commodity Type Awareness

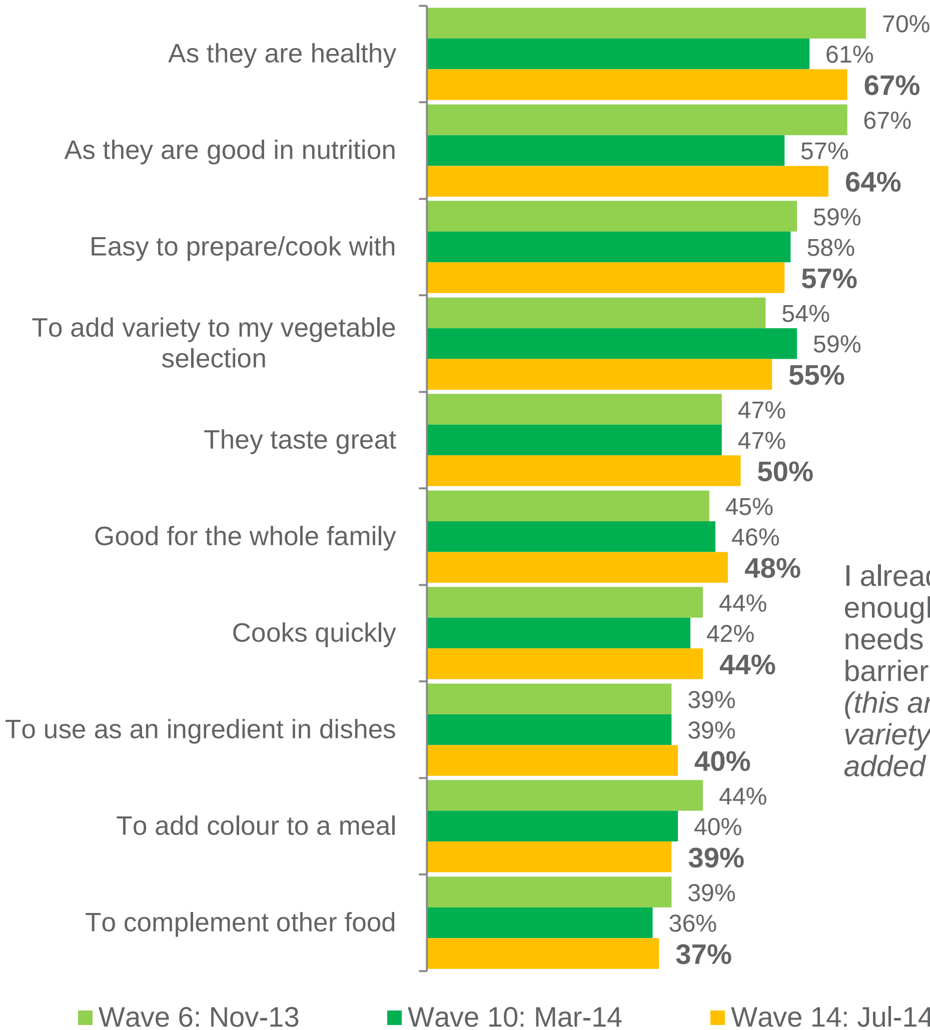
- Consistent with previous waves, over a half of respondents did not know any varieties of broccoli.
- Spontaneous awareness of broccoli and broccolini have gradually increased.
- There remained a high level of misattribution for broccolini as a type of broccoli (consistent across all waves).



Q6a. What varieties of <commodity> are you aware of? (unprompted)
Sample Wave 6 N=370, Wave 10 N=322, Wave 14 N=314

Triggers & Barriers to Purchase

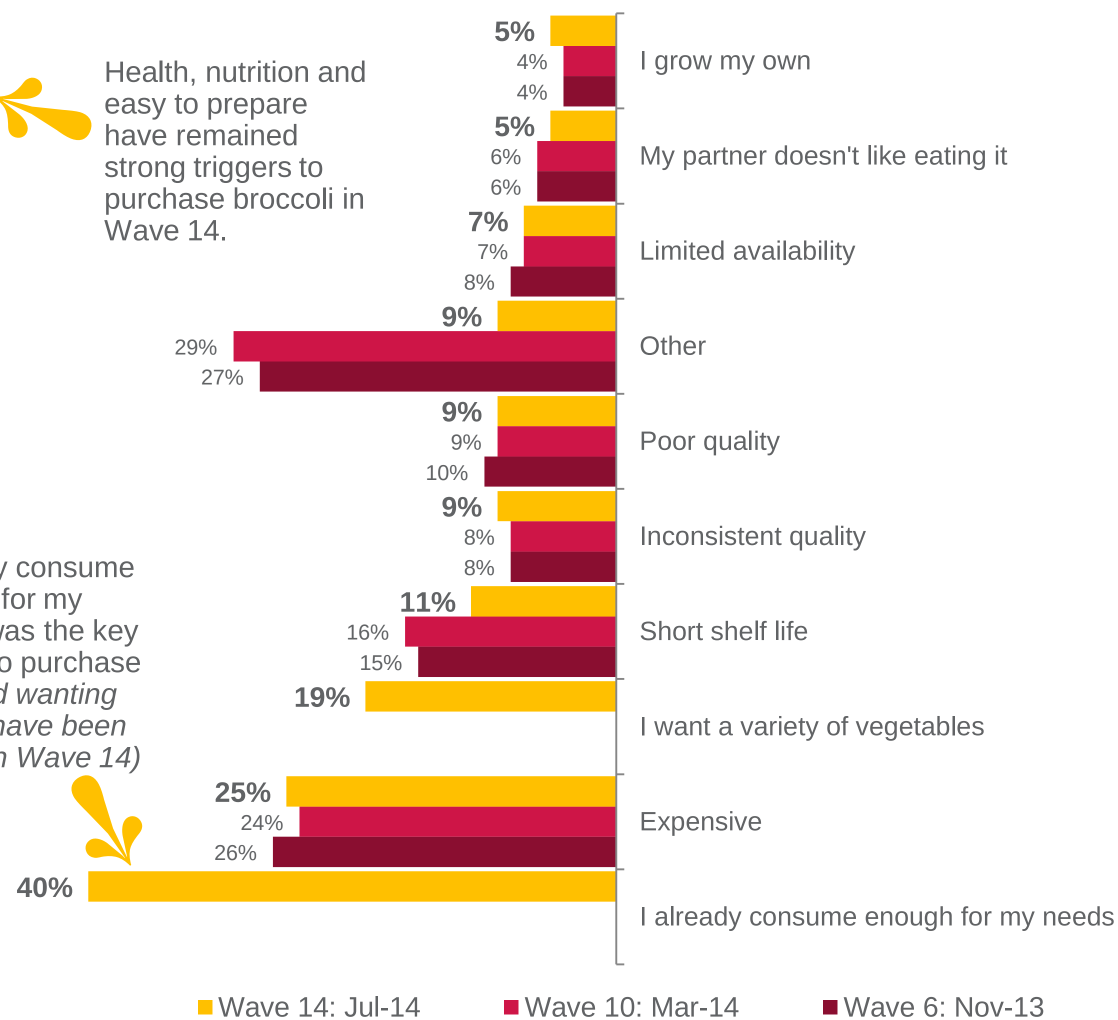
Triggers



Health, nutrition and easy to prepare have remained strong triggers to purchase broccoli in Wave 14.

I already consume enough for my needs was the key barrier to purchase *(this and wanting variety have been added in Wave 14)*

Barriers



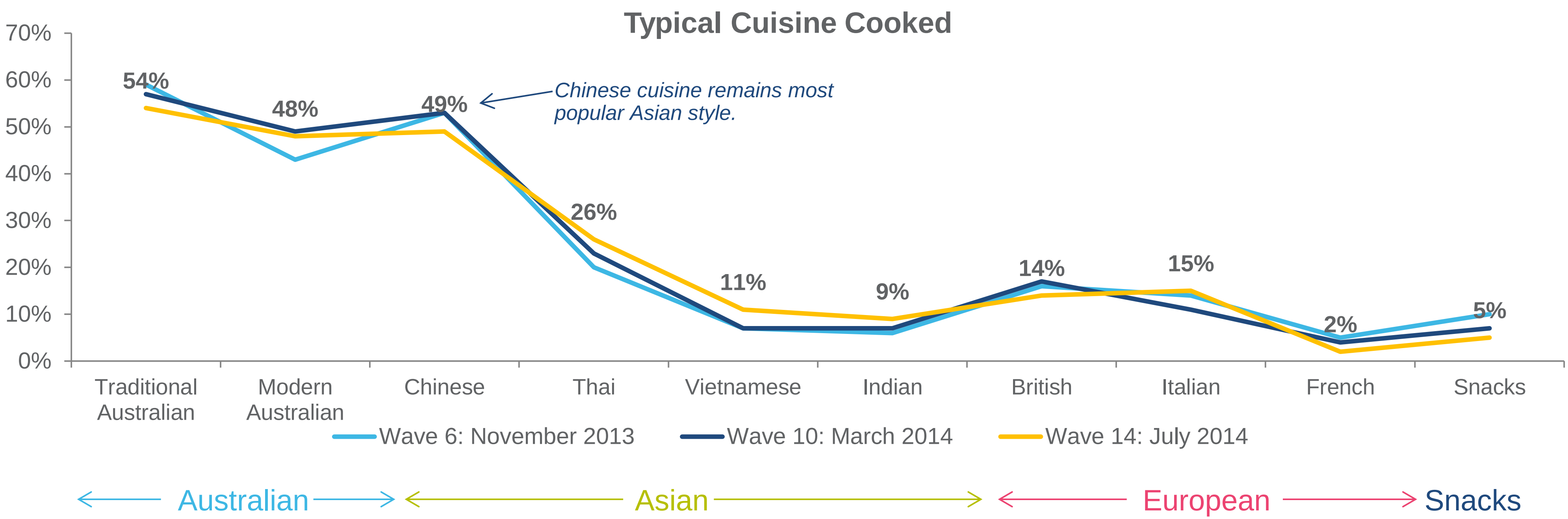
Sample Wave 6 N=370, Wave 10 N=322, Wave 14 N=314
Q7. Which of the following reasons best describes why you purchase <commodity>?
Q8. Which reason best describes why you don't buy <commodity> more often?

Cooking Cuisine & Occasions

- Weekday and weekend dinners are the top consumption occasions for broccoli, with only minimal variability across waves.
- Australian and Chinese cuisines were the top styles of meals cooked, with minimal changes across waves.

Wave 10 Top 5 Consumption Occasions

	Wave 14	Wave 10	Wave 6
Weekday Dinner	**65%**	▼	▬
Weekend Dinner	**43%**	▼	▼
Family meals	**39%**	▲	▼
Everyday	**33%**	▼	▼
Quick Meals	**27%**	▲	▼



Sample Wave 6 N=370, Wave 10 N=322, Wave 14 N=314
Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?

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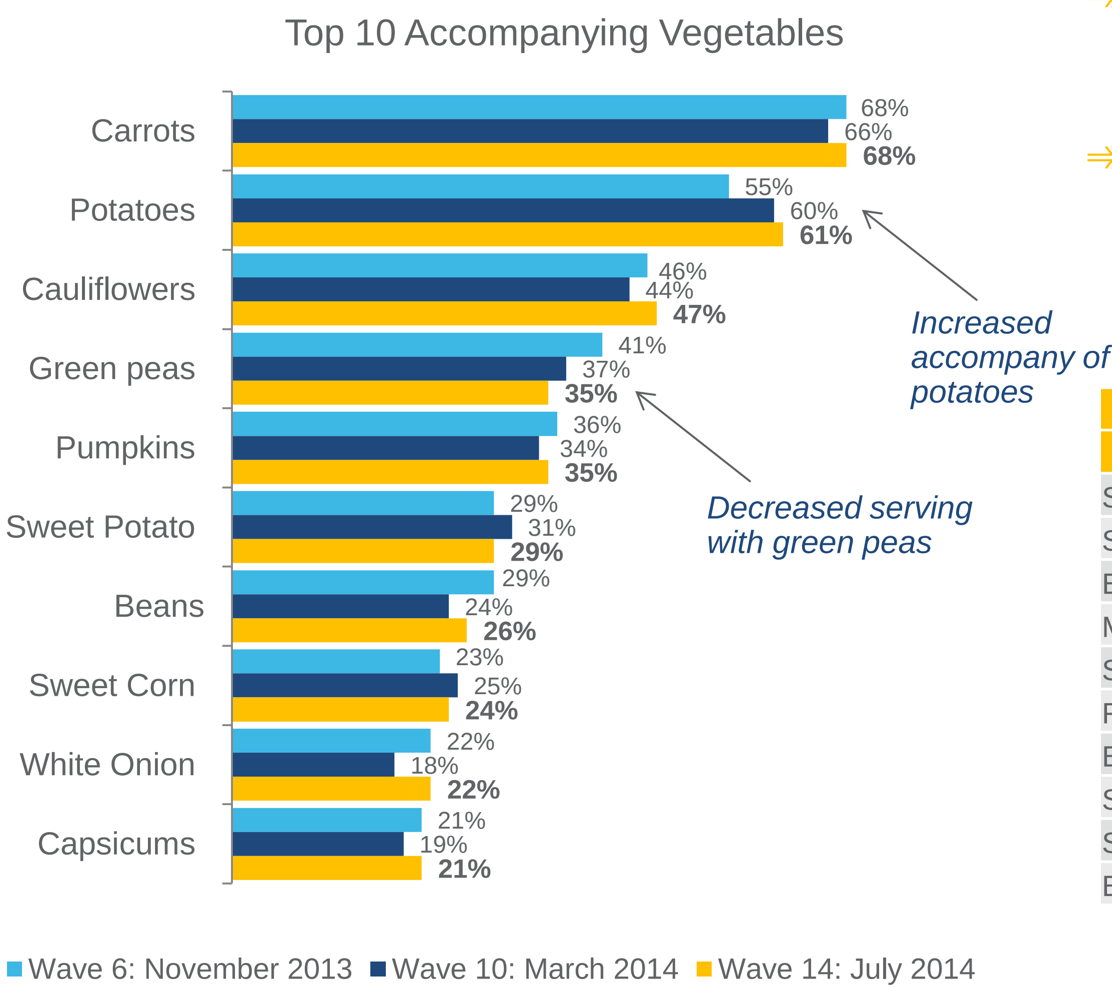
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Cooking Preferences



- Carrots, potatoes and cauliflower were the top three vegetables most often served with broccoli (consistent across all previous waves).
- Steaming, stir-frying, microwaving and boiling were the most common cooking methods for broccoli (remaining consistent across waves).

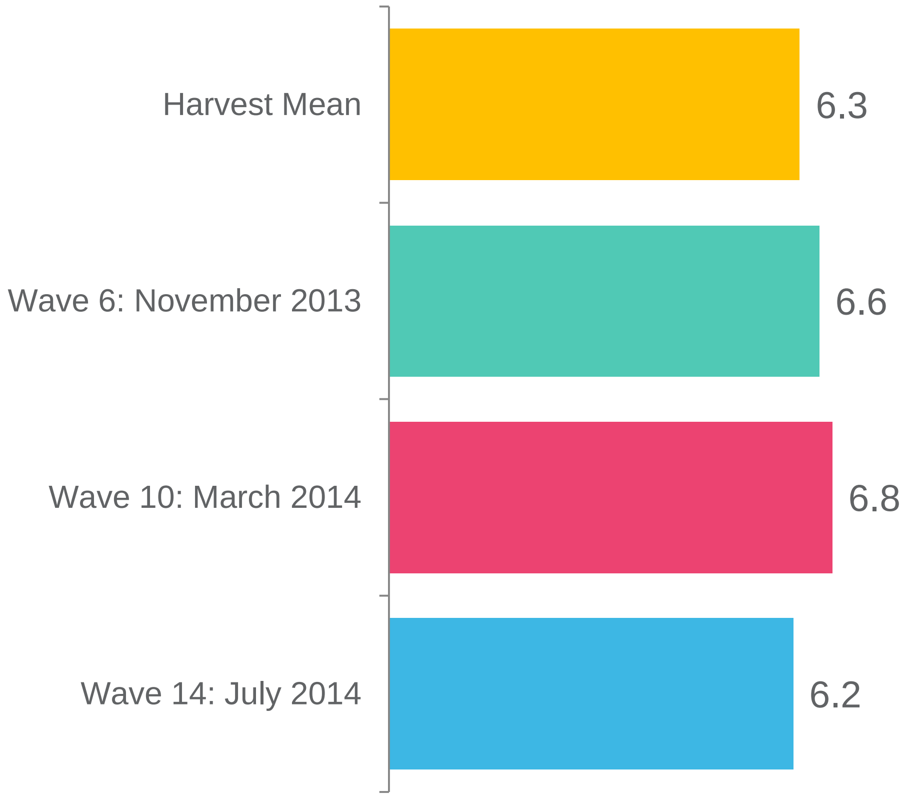
Top 10 Cooking Styles

	Wave 6	Wave 10	Wave 14
Steaming	66%	61%	65%
Stir frying	51%	51%	50%
Boiling	34%	32%	32%
Microwave	27%	32%	29%
Soup	10%	10%	16%
Raw	11%	10%	11%
Blanche	11%	12%	10%
Stewing	6%	6%	9%
Sautéing	12%	10%	9%
Baking	4%	4%	6%

Sample Wave 6 N=370, Wave 10 N=322, Wave 14 N=314
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?

Importance of Provenance

⇛ Although provenance remains important for broccoli, July saw this importance fall below the Harvest average.



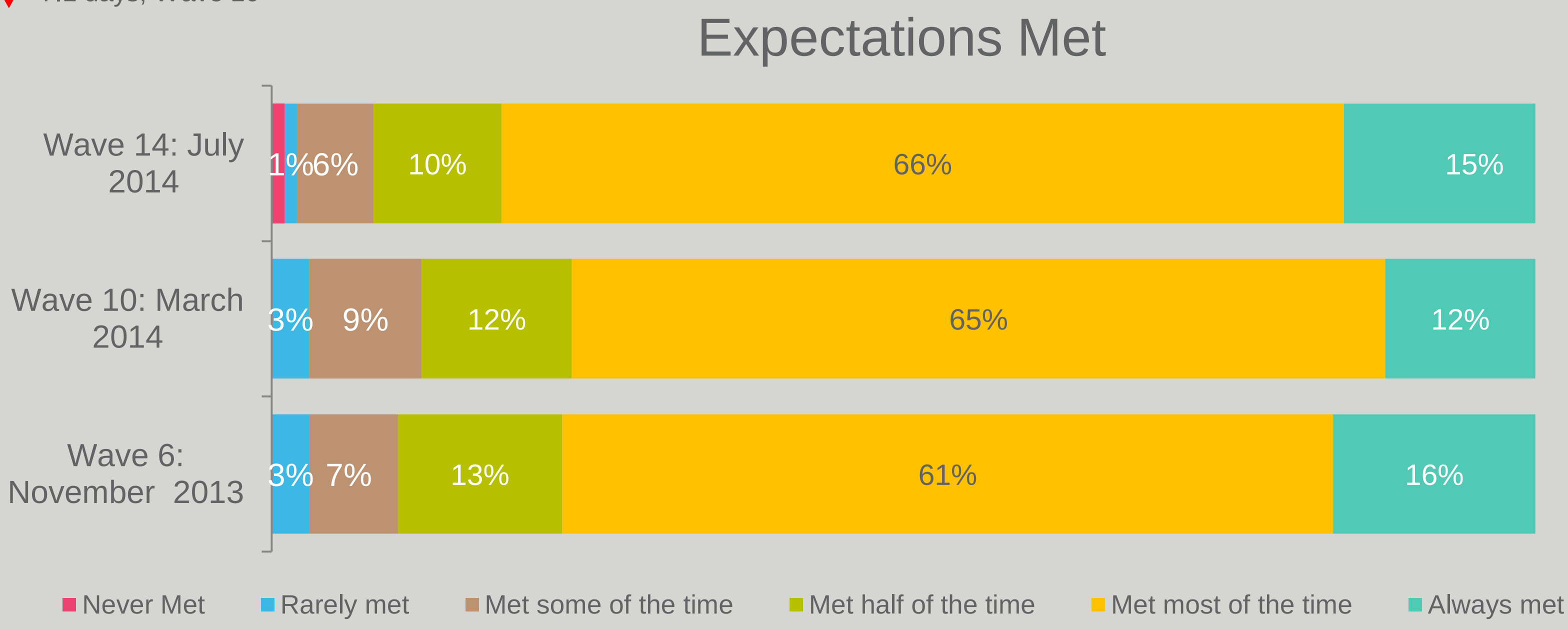
Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 6 N=370, Wave 10 N=322, Wave 14 N=314

Freshness and Longevity

Expected to stay fresh for **7.3** days

▼ 7.1 days, Wave 6
▼ 7.1 days, Wave 10

- Broccoli was expected to remain fresh for 7.3 days, longer than the previous two waves.
- 81% of the time freshness expectations were met at least most of the time for respondents who purchased broccoli, which the highest proportion achieved so far across waves.



Sample Wave 6 N=370, Wave 10 N=322, Wave 14 N=314
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> ?

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

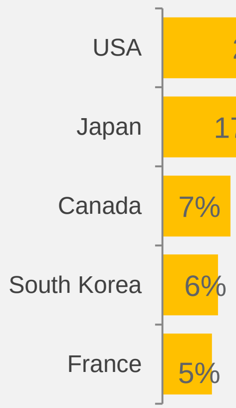
Trends: Broccoli

Broccoli Global NPDs

May - July 2014

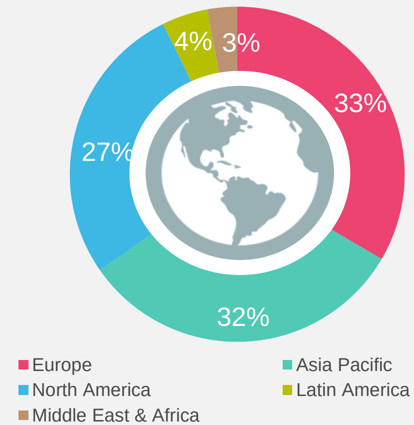
There were 314 new broccoli products launched globally over the last 3 months. Top categories for launch were meals and fruit and vegetables. These launches occurred primarily across Europe, Asia Pacific and North America.

Country

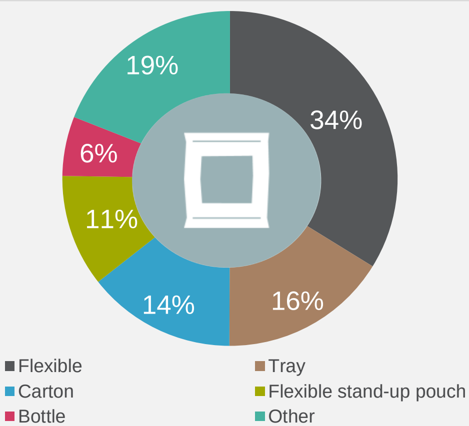


314 Global NPDs

Region



Top Pack Formats



Categories

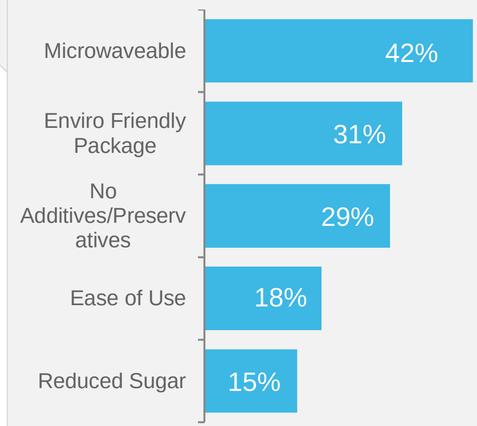
Meals 30%

Fruit & Vegetables 20%

Juice Drinks 14%

Baby Food 11%

Top Claims



Broccoli Product Launches:
Last 3 Months (May – July 2014)
Summary

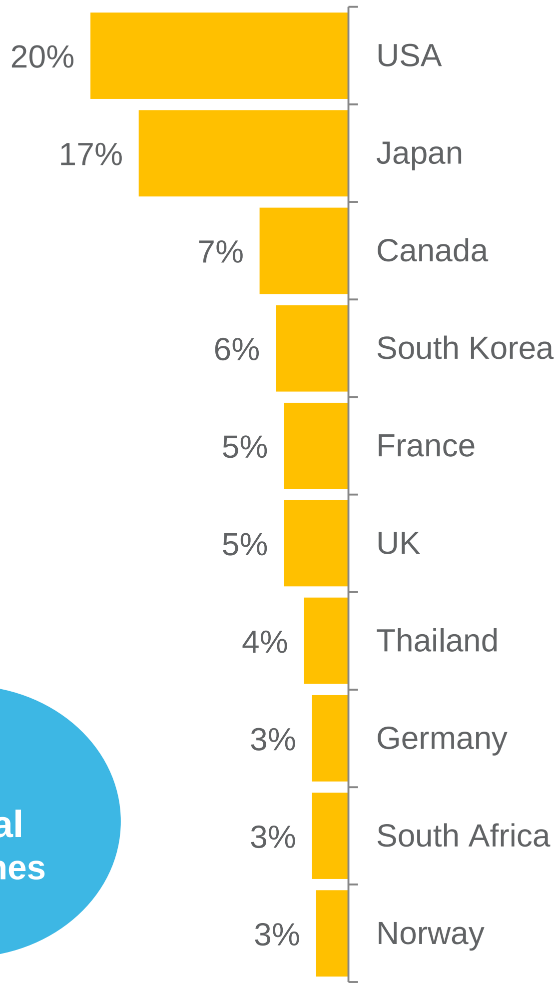
- A total of 314 products containing broccoli as an ingredient were launched globally within the last 3 months, which is an increase in the number of launches compared with previous trends.
- There was only one product containing broccoli launched in Australia in the past 3 months, baby food (see upcoming slide for more detail).
- Europe, Asia Pacific and North America remained the top regions for broccoli product launches (33%, 32% & 27%, respectively).
- Flexible pack formats (34%) were the predominant form of packaging for launches in the last 3 months. This is consistent with all previous waves tracked.
- The top categories for launches were meals (30%), fruit and vegetable products (20%), and juice drinks (14%).
- The core claims used for launches centred around convenience and health, with microwaveable being the top claim (42%), environmentally friendly packaging (31%) and no additives or preservatives (29%) Top claims that have been used have been consistent over all previous waves tracked.
- The most innovative launches found were Apple and Greens Fruit and Vegetable Bars (see upcoming slides for more detail).

Source: Mintel (2014)

Broccoli Launches
Country & Categories

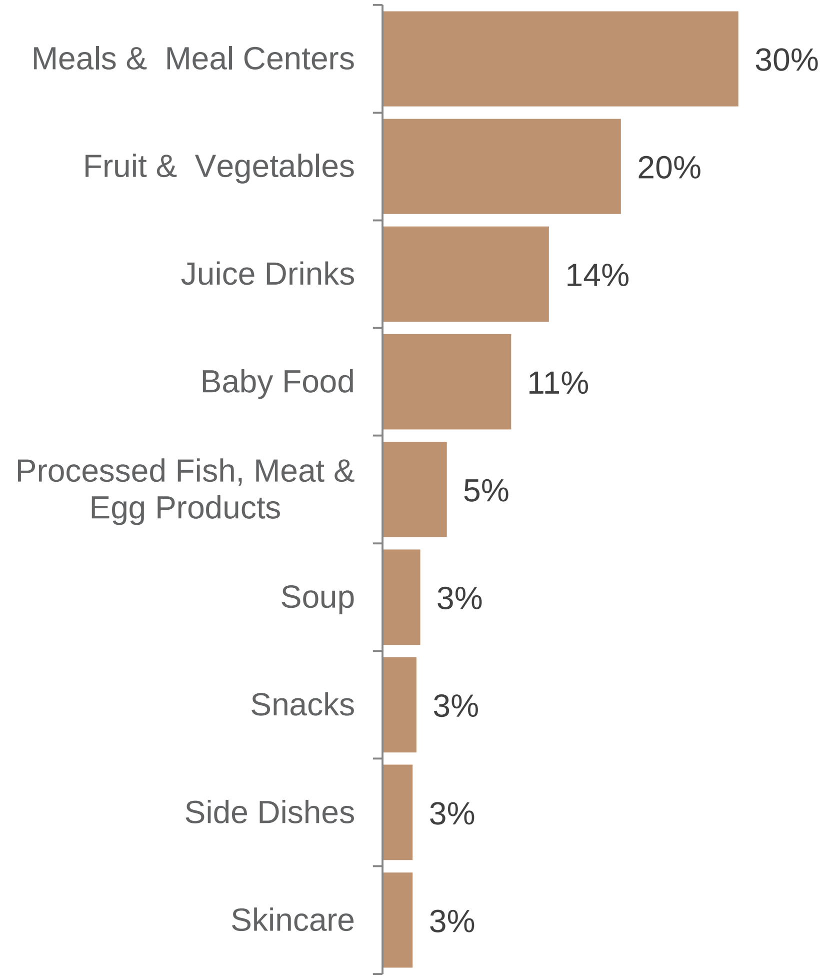
- USA and Japan were the key countries for launches over the last three months.
- The main categories for broccoli product launches were meals, fruit and vegetables and juice drinks.

Top Launch Countries



314 Global Launches

Top Launch Categories

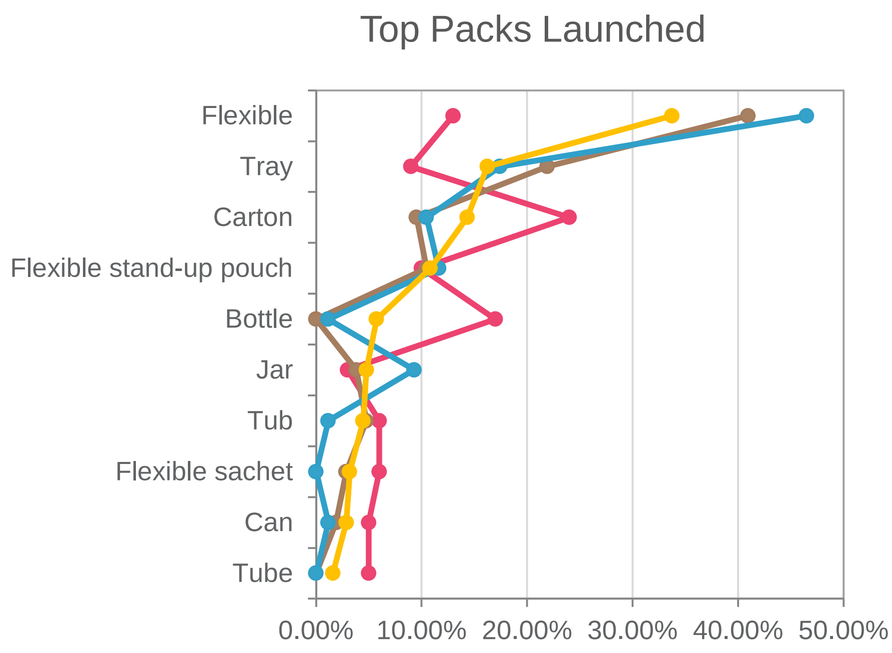


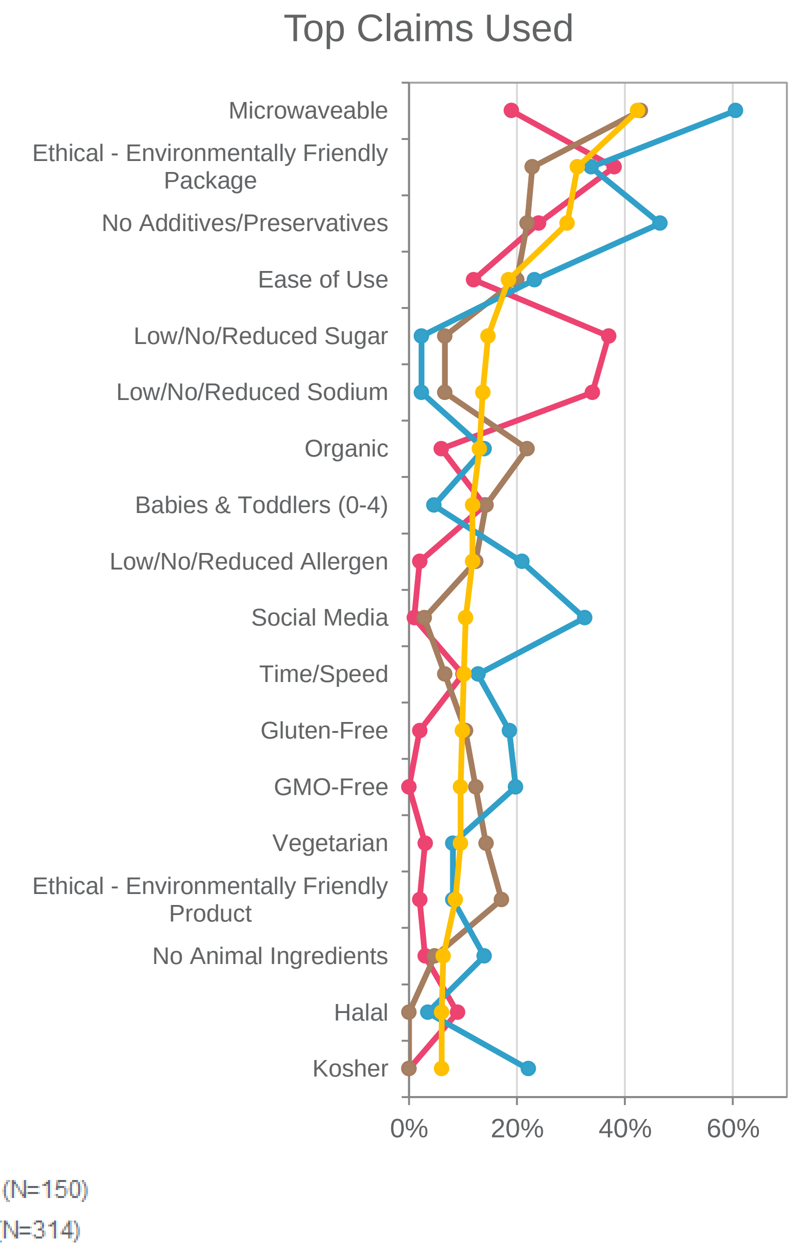
Number of Global Broccoli NPD for the L3M N=314

Broccoli Launches

Top Claims & Pack Formats Used

- Top packs used over the last three months were flexible formats. This was less utilised in Asia Pacific.
- The top claim used was products being ‘microwaveable’.
- Health claims were also commonly used, especially across North America and Asia Pacific.





Number of Global Broccoli NPD for the L3M N=314
Only regions with n >30 are displayed

Innovative Broccoli Launches:
L3M (May – July 2014)

Amazing Grass Green Superfood Cacao Chocolate Infusion Drink (USA)

Amazing Grass Green Superfood Cacao Chocolate Infusion Drink Powder comprises US grown organic green foods, Sambazon açaí and more than 3200mg of greens. The dietary supplement is GMO free, gluten free, raw, certified kosher and suitable for vegans.

Claims:
Cobranded, Low/No/Reduced Allergen, GMO-Free, Gluten-Free, Ethical - Environmentally Friendly Package, Other (Functional), Kosher, Organic, No Animal Ingredients, Vegan

Frost & Frisch Convenience Colourful Vegetable Skewers (Germany)

Frost & Frisch Convenience Bunte Gemüse-Spieße (Colourful Vegetable Skewers) consists of four skewers with bell pepper, carrots, broccoli and onions. The easy-to-use product can be cooked in the oven, pan or the grill, and retails in a 420g pack.

Claims:
Ease of Use

Vaughan Foods Fresh Fixins Broccoli Salad with Dressing (USA)

Vaughan Foods Fresh Fixins Broccoli Salad with a Sweet & Tangy Style Dressing is described as quick and easy. It can be just mixed and served and comprises fresh broccoli florettes, sweet and tangy dressing with red onions, bacon bits, sunflower kernels and raisins.

Claims:
Ease of Use, Time/Speed

Skin Food Water Drop Facial Ice Vita Cream (South Korea)

Skin Food Water Drop Facial Ice Vita Cream is formulated with more than 80% glacial water for cooling and refreshing effect as a light gel type watery cream. The product is free from mineral oil, artificial colourant, talc, sulfate surfactant, triethanolamine and benzophenone.

Claims:
Moisturising / Hydrating, No Additives/Preservatives, Male, Sulphate/Sulfate Free, Mineral Oil/Petroleum Free

Source: Mintel (2014)

Innovative Broccoli Launches:
L3M (May – July 2014)

Dreyer's Outshine Apple & Greens Fruit and Veggie Bars (USA)

Dreyer's Outshine Apple & Greens Fruit and Veggie Bars contain a fruit and vegetable content that is derived from puree and juice of: pumpkin, mango, pineapple, apple, banana and kiwi, kale and spinach. The kosher certified bars are said to be a good source of vitamins A and K.

Claims:
Ethical - Environmentally Friendly Package, No Additives/Preservatives, Social Media, Kosher

Tesco Everyday Value Vegetable Sausages (UK)

Tesco Everyday Value Vegetable Sausages are made with wholesome, lightly seasoned onion, carrot and broccoli. They contain no artificial preservatives, flavours or colours, and are suitable for vegetarians and vegans.

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

It Works! Berry Blue Greens Chew Dietary Supplement (USA)

It Works! Berry Blue Greens Chew Dietary Supplement is described as an antioxidant and prebiotic support supplement. The product is said to provide the following: the antioxidant strength of 20 cartons of blueberries, boost the body's defenses against free radical damage, support healthy nutrition and digestion with prebiotic dietary fiber.

Claims:
Immune System (Functional), Antioxidant, Cardiovascular (Functional), Digestive (Functional), GMO-Free

Dole Jui Stand Vegetable Smoothie (Japan)

Dole Jui Stand Vegetable Smoothie has been reformulated and repackaged. It now contains healthy barley grass. It is made with nine vegetables including carrots and four fruits including banana and apple. The product retails in a 200g pack. Launched on March 18, 2014 with an RRP of 184 yen.

Claims:
N/A

Source: Mintel (2014)

Innovative Broccoli Launches:
L3M (May – July 2014)

Ella's Kitchen Broccoli, Pear & Pea Puree (Belgium)

Ella's Kitchen Broccolis, Poires et Petits Pois (Broccoli, Pear & Pea Puree) is a 100% organic, finely puréed meal. It is suitable for babies aged four months and over, and contains no additives, added salt, sugar, gluten, lactose or preservatives. The product retails in a recyclable 100g pack.

Claims:
Low/No/Reduced Lactose, No Additives/Preservatives, Low/No/Reduced Allergen, Organic, Ethical - Environmentally Friendly Package, Low/No/Reduced Sugar, Gluten-Free, Low/No/Reduced Sodium, Babies & Toddlers (0-4)

Olivieri Broccoli & Cheddar Medallions (Canada)

Olivieri Broccoli & Cheddar Medallions are ready in four minutes. The limited edition product retails in a 250g pack featuring a recipe suggestion.

Claims:
Seasonal, Limited Edition, Time/Speed

Dare Breton Bites Veggie Bite-Size Crackers (Canada)

Dare Breton Bites Veggie Bite-Size Crackers have been repackaged. Made with wholegrain, this product is free from artificial colours, flavours and trans fat, and is low in saturated fat. The product is now available in a new recyclable 200g carton that features the Facebook logo.

Claims:
No Additives/Preservatives, Ethical - Environmentally Friendly Package, Social Media, Low/No/Reduced Saturated Fat, Low/No/Reduced Transfat, Wholegrain

Organic Just Handmade Food HiLo Super Greens Soup (UK)

Organic Just Handmade Food HiLo Super Greens Soup is formulated with nutrient dense food such as peas, spinach and broccoli. The gluten-free product is high in protein, low in fat and rich in folate and iron as well as a multitude of other healthy goodness.

Claims:
Low/No/Reduced Allergen, Gluten-Free, High Protein, Low/No/Reduced Fat, Slimming, Organic, Antioxidant, Cardiovascular (Functional)

Source: Mintel (2014)

Australian Broccoli Launches:
L3M (May- July 2014)

Only Organic Cauliflower, Broccoli & Cheddar (Australia)

Only Organic Cauliflower, Broccoli & Cheddar is suitable for babies from the age of six months onwards, and consists of broccoli and cauliflower served with a traditional cheese sauce. This organic certified product is made with New Zealand cheddar, and has a perfect fork mash texture, which is ideal for babies learning to eat.

Claims:
Ease of Use, No Additives/Preservatives, Vegetarian, Babies & Toddlers (0-4), Organic

Source: Mintel (2014)

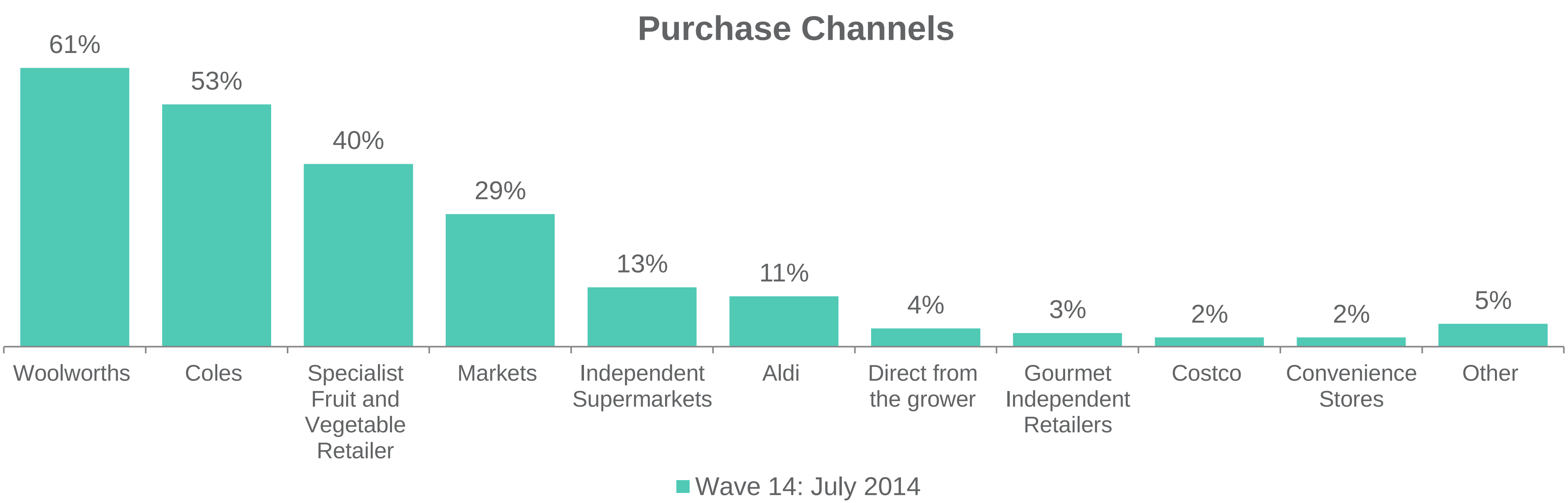
Chillies.

Purchase and Consumption Behaviour

Average Purchase **3.6** times per month

Average Consumption **12.0** times per month

- On average chillies are purchased 3.6 times per month and consumed 12.0 times per month.
- The key purchase channels were from mainstream retailers, Woolworths and Coles. Specialist retailers were also a popular purchase location.



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 14 ,N=261

Average Spend and Price Sensitivity

Average weight of purchase

The typical consumer purchased **260g** of chillies.

Recalled last spend

Recalled last spend on chilli purchase was **$3.70.**

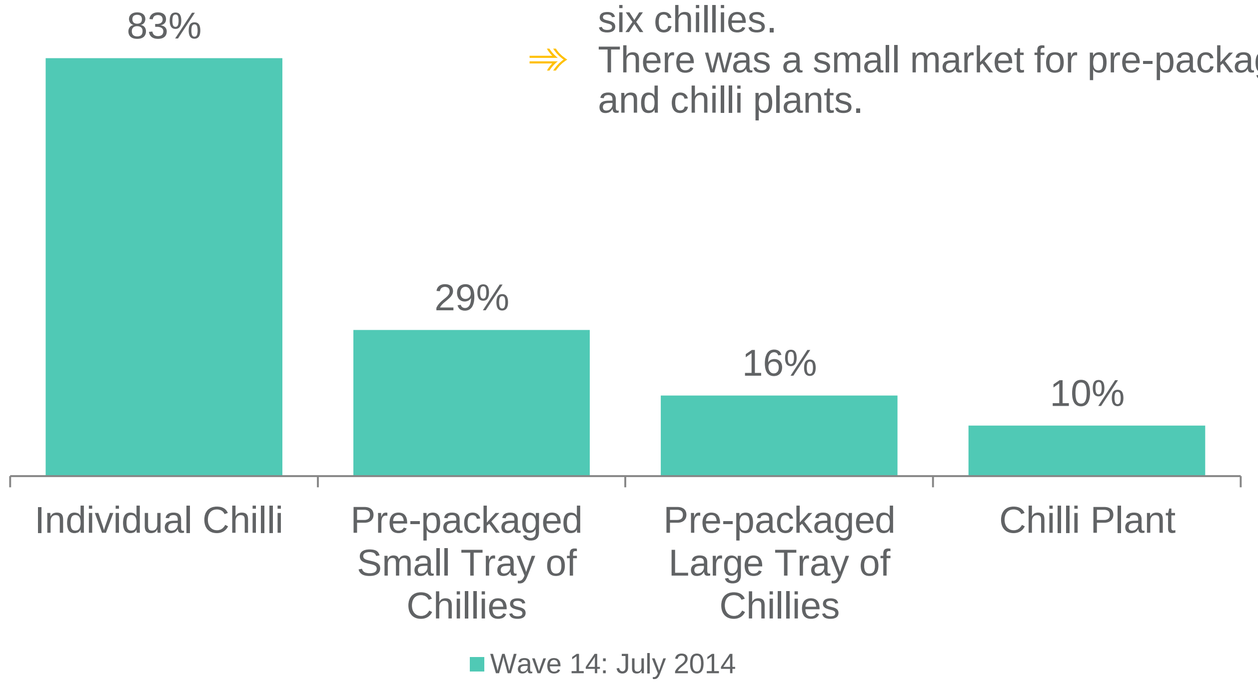
Value for money

Consumers' perceived value for money was relatively fair **(6.1/10)**.

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 14, N=261

Pack Formats Purchased

- Individual chillies were the main format purchased by consumers. Per shop, consumers typically purchased six chillies.
- There was a small market for pre-packaged chillies and chilli plants.

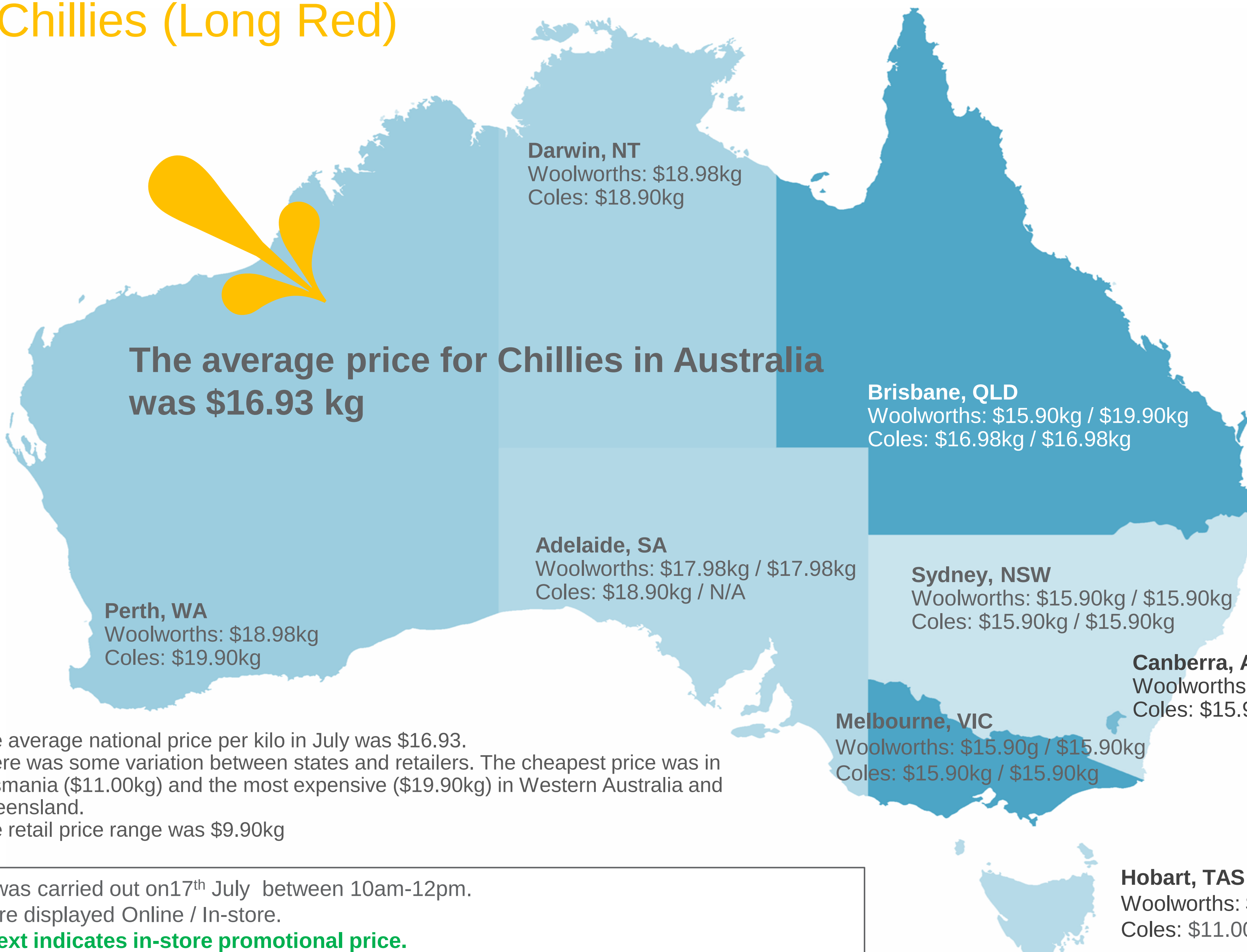


Average Amount Purchased	Individual	Pre-packaged Small Tray	Pre-packaged Small Tray	Chilli Plant
Wave 14: July 2014	5.8	1.8	1.8	2.1

Q3a. How much <commodity> does this typically equate to?
Sample Wave 14, N=261

Online and In-store Commodity Prices

Chillies (Long Red)

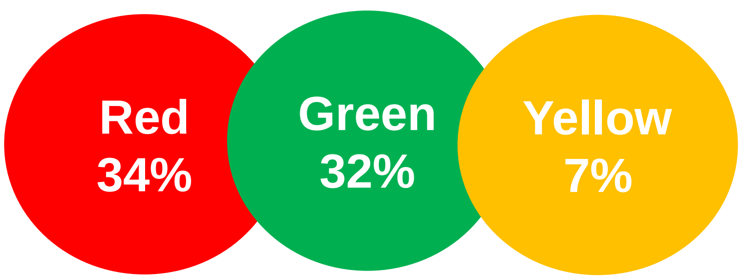


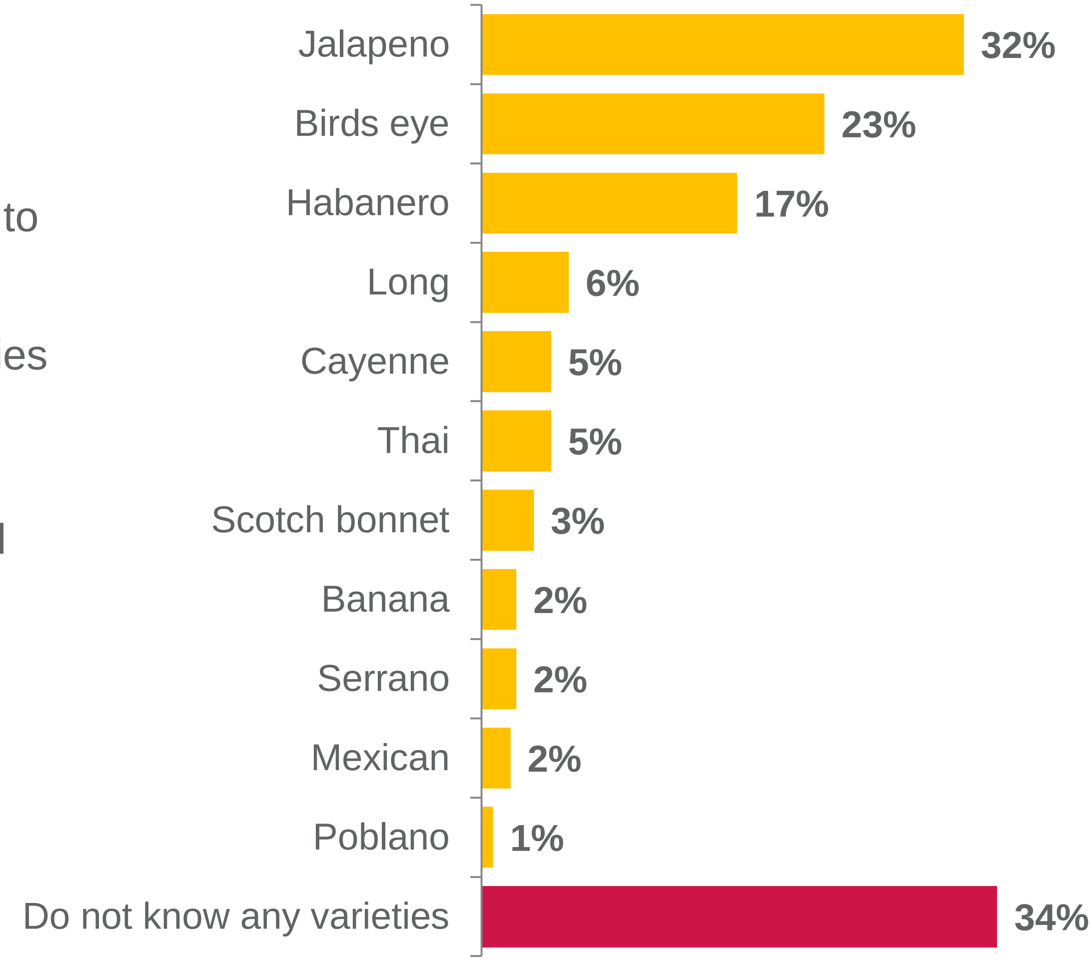
- The average national price per kilo in July was $16.93.
- There was some variation between states and retailers. The cheapest price was in Tasmania ($11.00kg) and the most expensive ($19.90kg) in Western Australia and Queensland.
- The retail price range was $9.90kg

Pricing was carried out on17th July between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates in-store promotional price.

Spontaneous Awareness

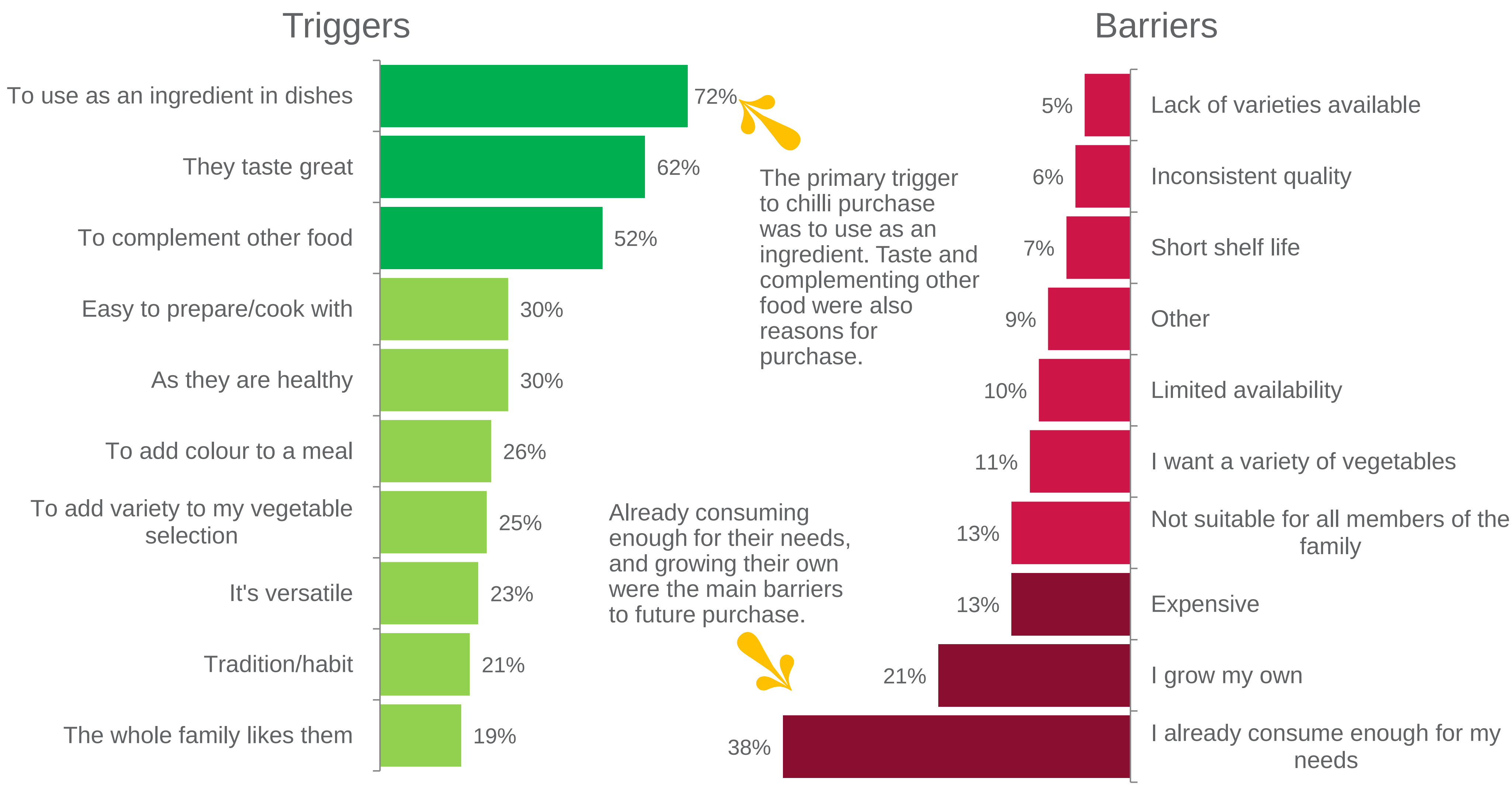
- There was relatively good levels of spontaneous awareness of chilli types. Only a third of respondents were unable to recall a type of chilli.
- Jalapeno, Birds eye and Habanero chillies had the greatest recall amongst consumers.
- Colour was recalled frequently. Red and Green were the most recalled colours of chillies.





Q6a. What types/varieties of <commodity> are you aware of? (unprompted)
Sample Wave 14, N=261

Triggers and Barriers to Purchase



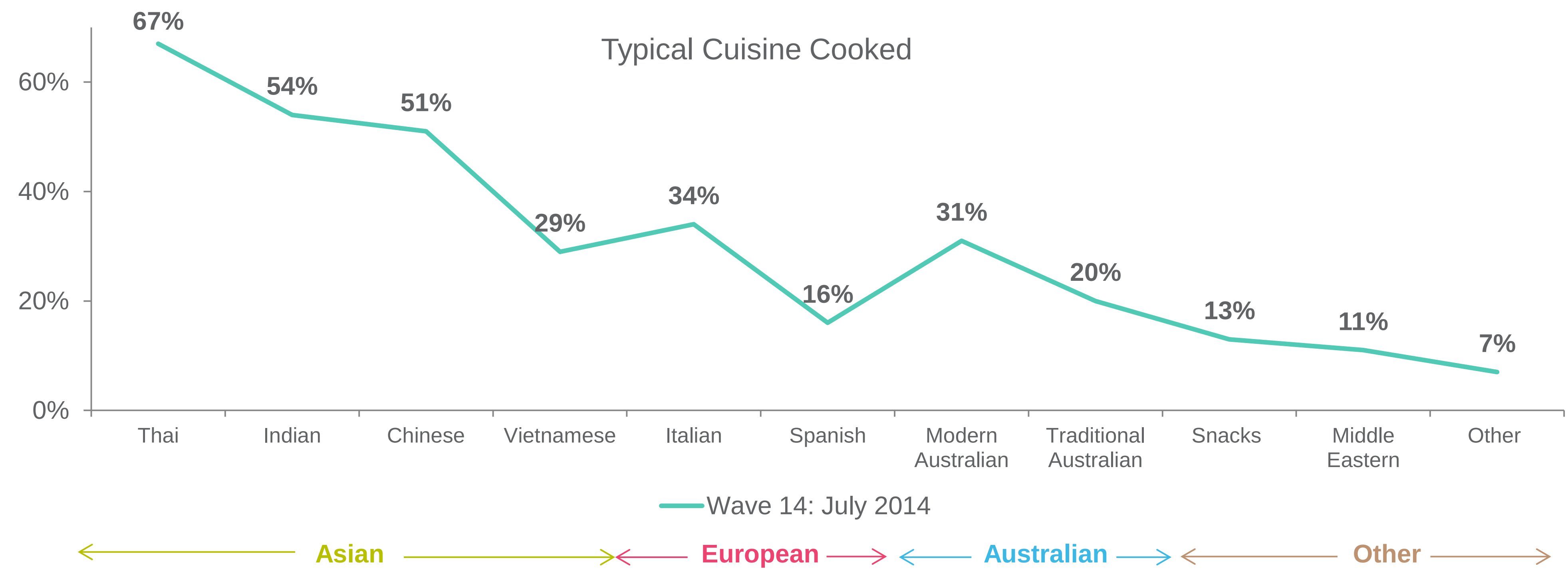
Sample Wave 14, N=261
Q7. Which of the following reasons best describes why you purchase <commodity> ?
Q8. Which reason best describes why you don’t buy <commodity> more often?

Cooking Cuisines and Occasions

- Chillies were most typically cooked in Asian cuisine, especially Thai and Indian. Italian was also popular.
- Dinners were the main consumption occasions, both weekdays and weekends.

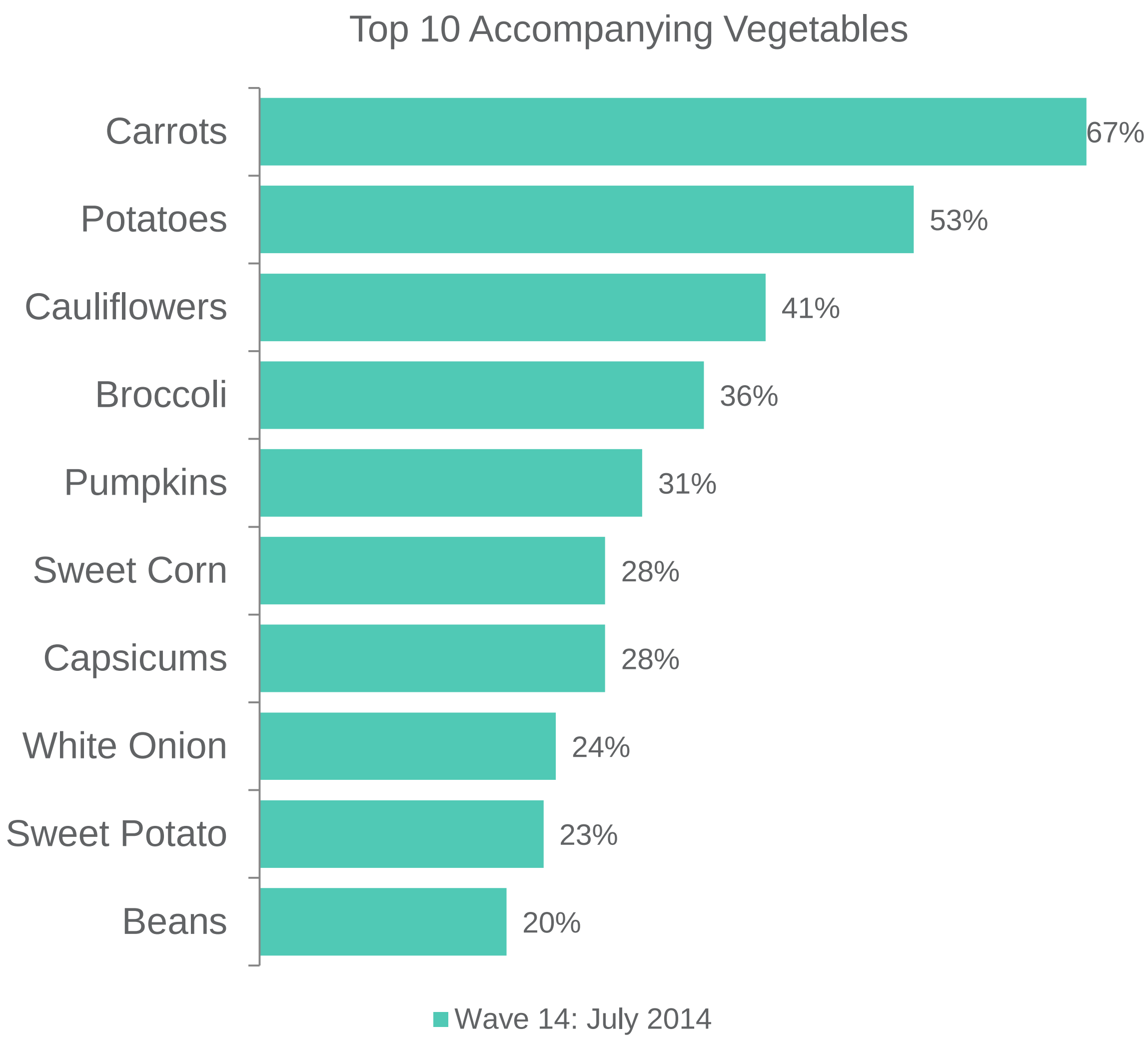
Wave 14 Top 5 Consumption Occasions

Weekday Dinner	57%
Weekend Dinner	51%
Everyday	36%
Family meals	34%
New recipes	30%



Sample Wave 14, N=261
Q10. What cuisines do you cook/consume that use <commodity> ?
Q11. Which of the following occasions do you typically consume/use <commodity> ?

Cooking Preferences



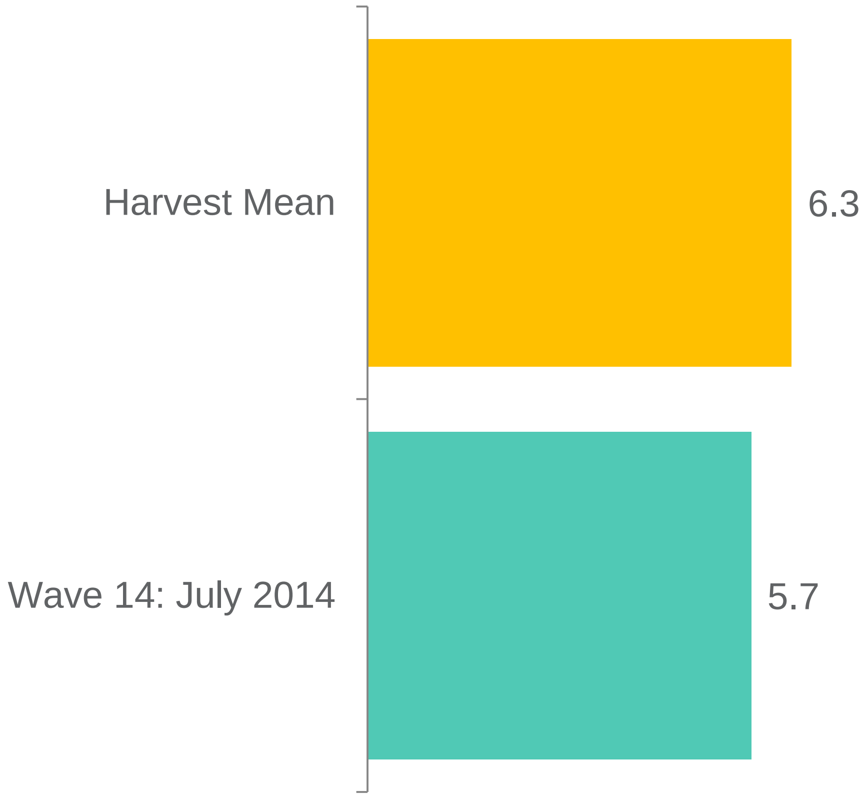
- Chillies were typically served with carrots, potatoes and cauliflower.
- Stir-frying was the main cooking technique, which aligns with cuisine choice.

Top 10 Cooking Styles	
	Wave 14
Stir frying	72%
Sautéing	34%
Soup	32%
Raw	29%
Stewing	28%
Mince	26%
Shallow Frying	23%
Blend	19%
Roasting	13%
Grilling	11%

Sample Wave 14, N=261
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?

Importance of Provenance

⇛ Provenance was only marginally important to consumers, the lowest of all commodities tracked thus far.



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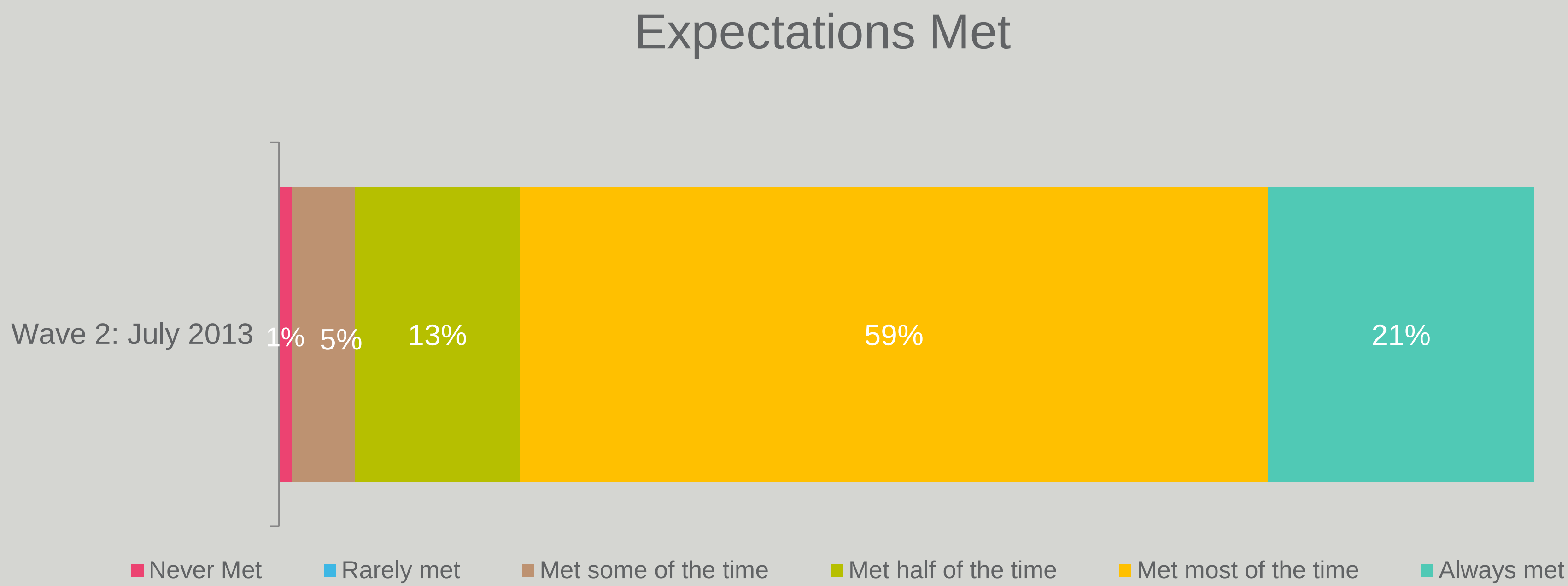
Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 14 ,N=261

Freshness and Longevity

Expected to stay fresh for **12.2** days

- Chillies were expected to remain fresh for over 12 days, which was quite lengthy comparative to other commodities.
- Expectations of freshness were primarily being met at least most of the time.



Sample Wave 14 ,N=261
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> ?

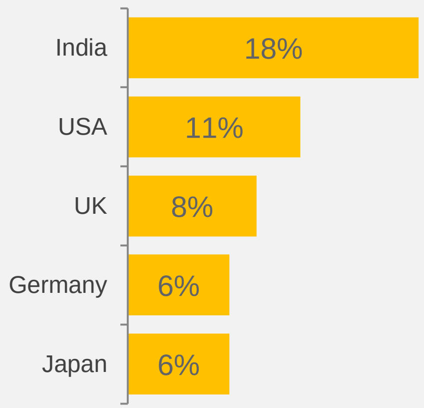
Trends: Chillies

Chilli Global Launches

May – July 2014

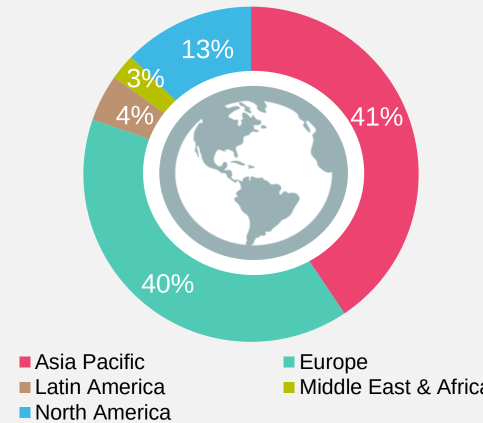
There were 315 new products launched in the last 3 months that used green peas as an ingredient. The majority of these launches were in Europe. The top category products it launched in were snacks, processed food products and bakery goods.

Country

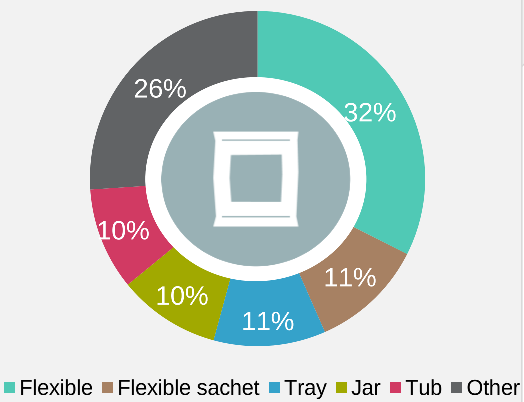


1269 Global NPDs

Region



Top Pack Formats



Categories

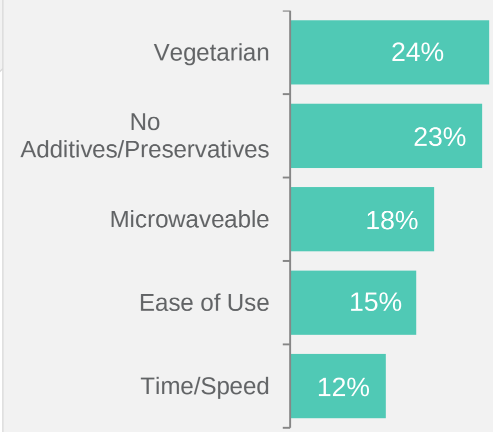
Sauces & Seasoning 37%

Meals 24%

Snacks 16%

Processed Products 11%

Top Claims



Chilli Product Launches:
Last 3 Months (May – July 2014)
Summary

- A total of 1269 products that contained chilli as an ingredient have been launched globally in the last 3 months.
- There were 15 chilli products that were launched in Australia.
- The two main regions for launches were Asia Pacific (41%) and Europe (40%). India (18%) was the key country for chilli product launches.
- Flexible packaging (32%) and flexible sachets (11%) were the main formats used for launches over the past three months.
- Top categories for launches was sauces and seasoning (37%), meals (24%) and snacks (16%).
- The core claims used were vegetarian (24%), no additives/ preservatives (23%) and microwaveable (18%).
- The most innovative launches found were gourmet popcorn hot chilli sauce and cheese chilli cheddar spreadable processed cheese (see upcoming slides for more details).

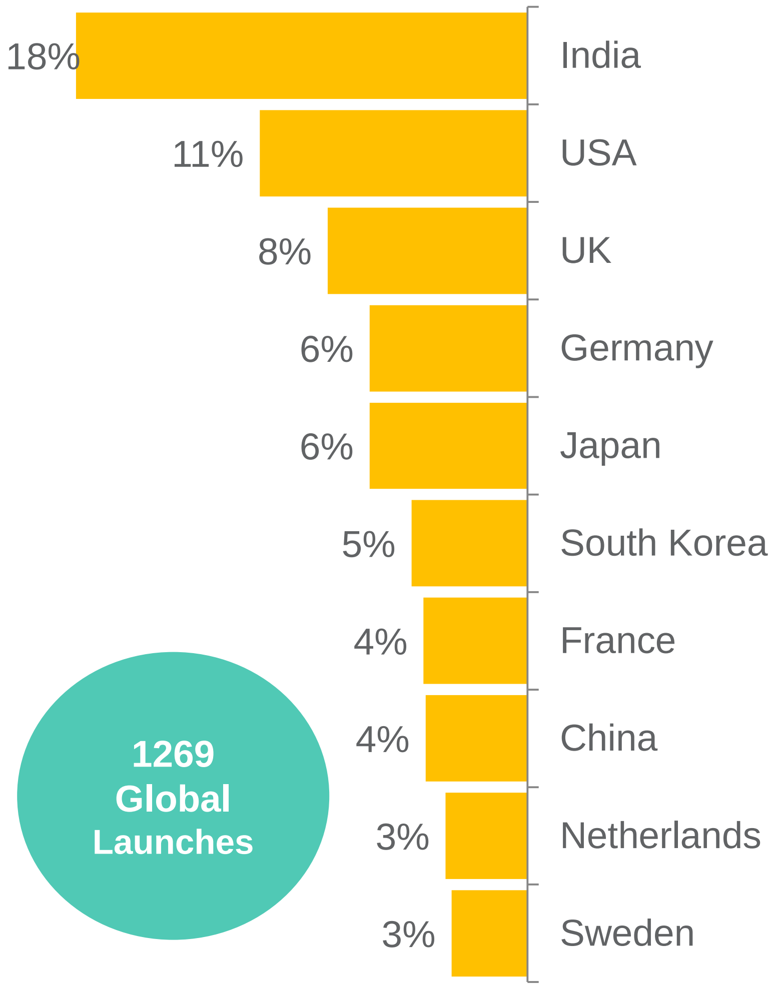
Source: Mintel (2014)

Chilli Launches

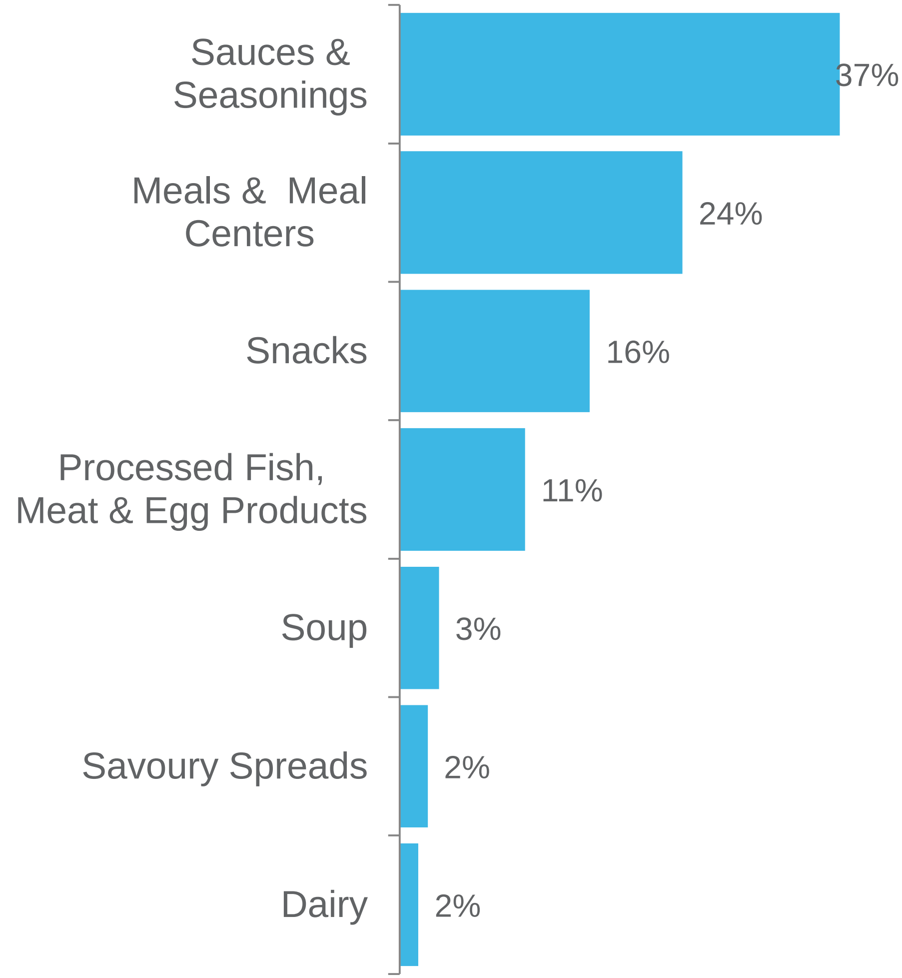
Country & Categories

- India, USA and UK had the greatest number of launches over the past three months.
- Key categories for chilli products were sauces and seasonings and meals.

Top Launch Countries



Top Launch Categories



colmar brunton.

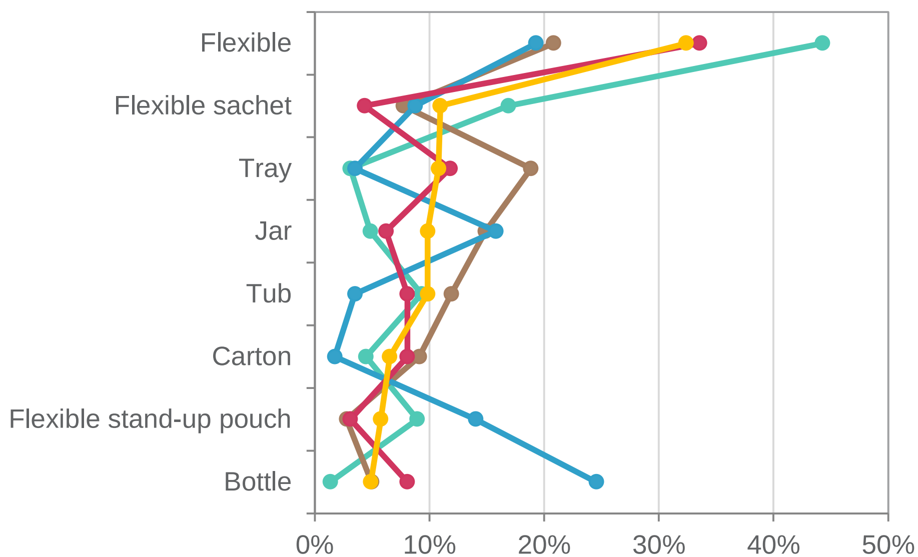
Number of Global Green Peas NPDs for the L3M N=1269

Chilli Launches

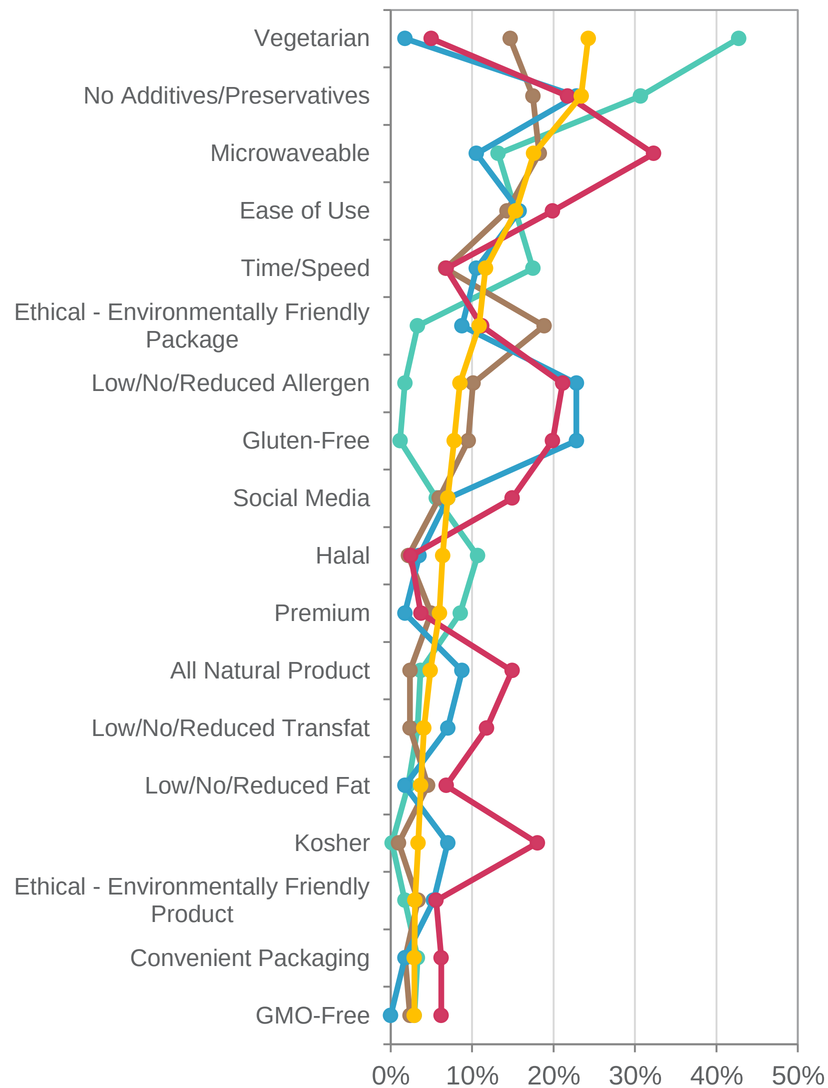
Claims & Pack Formats

- Key packaging formats used for chilli products launched over the last three months were flexible. This was used more heavily in the Asia Pacific region.
- Key claims were around health and convenience. Vegetarian product claims was very popular in Asia Pacific. Whilst microwaveable was the top claim used in North America.

Top Packs Used



Top Claims Used



Number of Global Green Peas NPDs for the L3M N=1269
Only shown regions > 30 products launched

Innovative Chilli Launches:
L3M (May – July 2014)

POP! Gourmet Popcorn Sriracha Hot Chilli Sauce Popcorn (USA)

POP! Gourmet Popcorn Sriracha Hot Chili Sauce Popcorn features Huy Fong Foods Tuong Ot Sriracha sauce. Through a unique process, Sriracha's intensely flavorful and wildly loved blend of sun ripened chili peppers and garlic adds the perfect hot and spicy seasoning to this premium golden popcorn.

Claims:
Cobranded, No Additives/Preservatives, All Natural Product, Low/No/Reduced Allergen, GMO-Free, Convenient Packaging, Kosher, Gluten-Free, Low/No/Reduced Transfat, Premium

SMH Signature Chilli Crab Pau Dumplings (Singapore)

SMH Signature Chilli Crab Pau Dumplings are made from fresh succulent crabs fried in a sweet and savoury chilli-and-tomato based sauce. The product contains no added MSG and retails in a 240g pack containing eight delightful pieces and featuring a link to the manufacturer's Facebook page.

Claims:
No Additives/Preservatives, Social Media

Williams-Sonoma Chipotle Spicy Rub (USA)

Williams-Sonoma Chipotle Spicy Rub has been repackaged. This seasoning rub can be added to beef, pork and chicken, and combines hot chipotle peppers with brown sugar, roasted garlic and classic spices, including aromatic oregano, cumin and coriander.

Claims:
Kosher

Président My Cheese Chilli Cheddar Spreadable Processed Cheese (Vietnam)

Président My Cheese Pho Mai (Chilli Cheddar Spreadable Processed Cheese) is now available. The product retails in a 125g pack.

Claims:
N/A

Source: Mintel (2014)

Innovative Chilli Launches:
L3M (May – July 2014)

M Piri Piri Rice (UK)

M Mushroom Rice is described as an easy, tasty snack or side dish. This medium spiced product is suitable for vegetarians, and comprises seasoned long grain rice with red pepper, tomato, chilli powder, coriander and jalapeño chillies.

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

Hormel REV Spicy BBQ & Bacon Meat Snack Mix (USA)

Hormel REV Spicy BBQ & Bacon Meat Snack Mix is now available. The product is described as a delicious snack on-the-go made with barbecue seasoned bagels chips and sourdough pretzels with crispy and crunchy jalapeno bacon. It contains 9g of proteins and retails in a 1.6-oz. pack.

Claims:
On-the-Go

Marks & Spencer The Grill Summer of Flavour Chilli Cheese Posh Dogs (Ireland)

Marks & Spencer The Grill Summer of Flavour Chilli Cheese Posh Dogs comprises pork sausages with cheese and jalapeno chilli. This medium hot, gluten-free product is ready to cook, and retails in a 540g partly recyclable pack containing six units.

Claims:
Seasonal, Low/No/Reduced Allergen, Other (Functional), Ethical - Environmentally Friendly Package, Ease of Use, Gluten-Free

Kühne Saison Edition Spicy Zamba Sauce with Pepper and Chilli (Germany)

Kühne Saison Edition Würzig-Scharf Zamba Sauce mit Pfeffer & Chili (Spicy Zamba Sauce with Pepper and Chili) is free from added flavour enhancers and preservatives. This limited edition sauce is for Football Championship in Brazil. The product retails in a 250ml pack.

Claims:
No Additives/Preservatives, Event Merchandising, Limited Edition

Source: Mintel (2014)

Innovative Chilli Launches:
L3M (May – July 2014)

Nolan Ryan's Beef Hickory Smoked Beef Hot Links (USA)

Nolan Ryan's Beef Hickory Smoked Beef Hot Links are now available. The USDA certified product contains no gluten, soy, or MSG and is heat and serve and fully cooked. The artificially colored, microwavable links retail in a 13.5-oz pack displaying the Facebook social media logo.

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

Rio Sisa Yellow Chilli Pepper & Black Mint Peruvian Sauce (Peru)

Rio Sisa Salsa Peruana Aji Amarillo con Huacatay (Yellow Chilli Pepper & Black Mint Peruvian Sauce) features a medium spiciness and is free from flavors and artificial colorants. The product retails in a 240g pack that features a recipe suggestion.

Claims:
No Additives/Preservatives

Blue Diamond Bold Habanero BBQ Almonds (Egypt)

Blue Diamond Bold Habanero BBQ Almonds are new to the range. This smart snacking, kosher product is peanut free and retails in a 43g pack.

Claims:
Low/No/Reduced Allergen, Kosher

Pringles Xtra Spicy Chilli Sauce Snack (France)

Pringles Xtra Snack Salé Goût Sauce Chili Piquant (Spicy Chilli Sauce Snack) has been repackaged. The vegetarian product retails in a 150g pack that features the X-Men Day of Future Past film graphics.

Claims:
Vegetarian, Event Merchandising

Source: Mintel (2014)

Australian Chilli Launches:
L3M (May – July 2014)

Latina Fresh Spicy Chicken & Chorizo with Fusilli Pasta

Sun Bites Grain Waves Sweet Chilli Wholegrain Chips

Spencers Indian Korma

Outback Spirit Outback Tomato Chutney

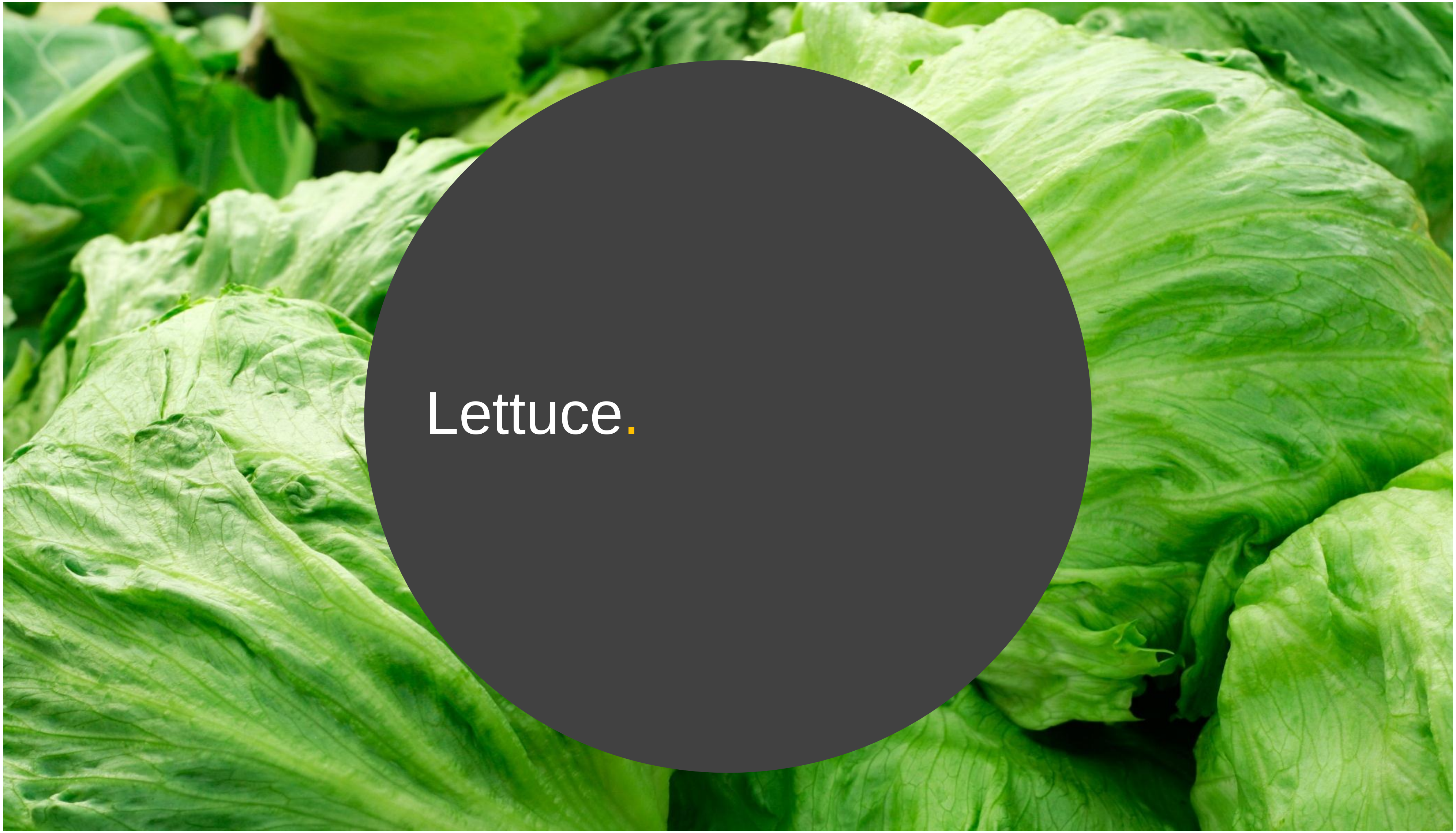
Asian Home Gourmet Thai Tom Yum Soup Spice Paste

Old El Paso Chili Spice Mix

Patak's Premium Signature Dishes Hot & Fiery Jalfrezi Curry

Campbell's Country Ladle Café Style Indian Spiced Soup

Source: Mintel (2014)



Lettuce.

Purchase and Consumption Behaviour

Average Purchase **4.7** times per month

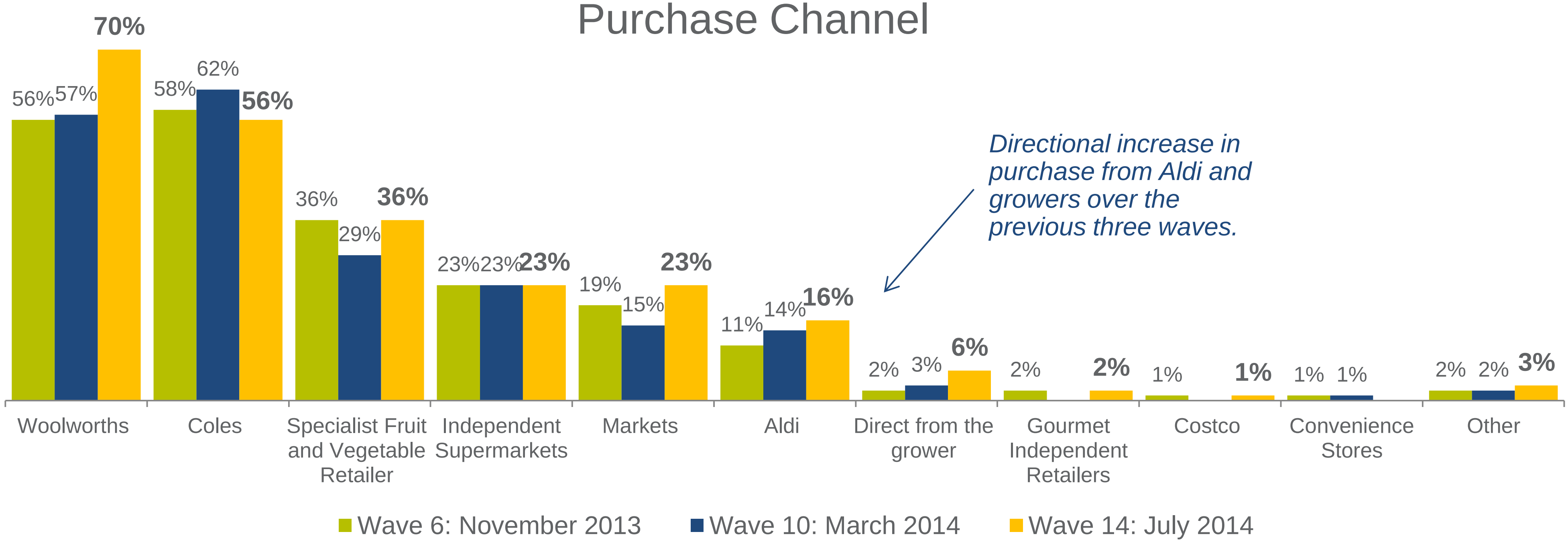
▲ 4.9 times, Wave 6
▼ 4.6 times, Wave 10

Average Consumption **13.0** times per month

▲ 14.7 times, Wave 6
▲ 14.2 times, Wave 10

- Purchase frequency was on trend with previous waves. On average consumers are purchasing lettuce at least once a week.
- However, consumption frequency was lower than November last year, and March this year. Trends indicate that peak consumption is across warmer months, and dips in cooler months.
- There was variability in purchase channels compared with previous waves. This month Woolworths was the main retail channel for purchase.

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 6 N=370, Wave 10 N=326 Wave 14 N=315

colmar brunton.

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

Average Spend and Price Sensitivity

Average weight of purchase

The typical consumer purchased **800g** of lettuce, which was on trend with previous waves.

▼ 700g, Wave 6
▼ 700g, Wave 10

Recalled last spend

Recalled last spend on the purchase of lettuce was **$3.58.** This was slightly higher than previous waves.

▼ $3.47, Wave 6
▼ $3.50, Wave 10

Value for money

Consumers' perceived value for money was only fair **(5.7/10)**, down from Waves 6 and 10.

▲ 6.0/10, Wave 6
▲ 6.0/10, Wave 10

Recalled last spend has slightly increased over the past three waves, which may be why value for money has decreased this month

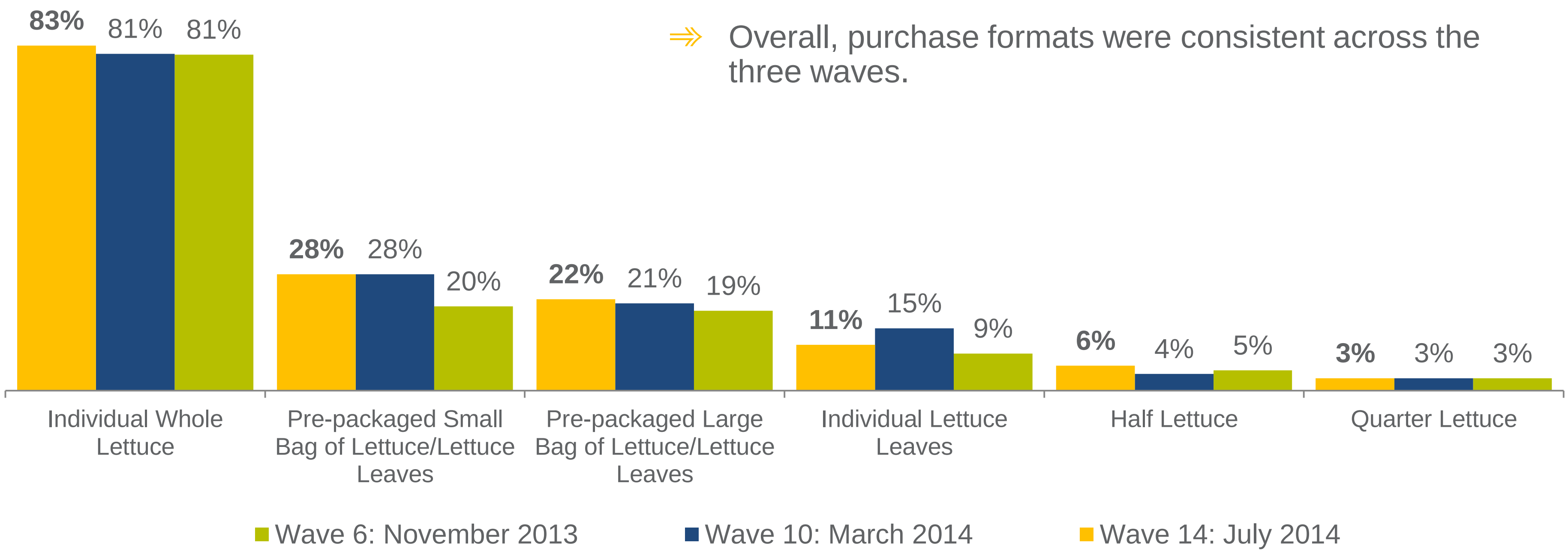
Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? 0-10 scale
Sample Wave 6 N=370, Wave 10 N=326 Wave 14 N=315

colmar brunton.

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

Pack Formats Purchased

- Single whole lettuce heads remained the most common format purchased over the last three waves.
- Overall, purchase formats were consistent across the three waves.

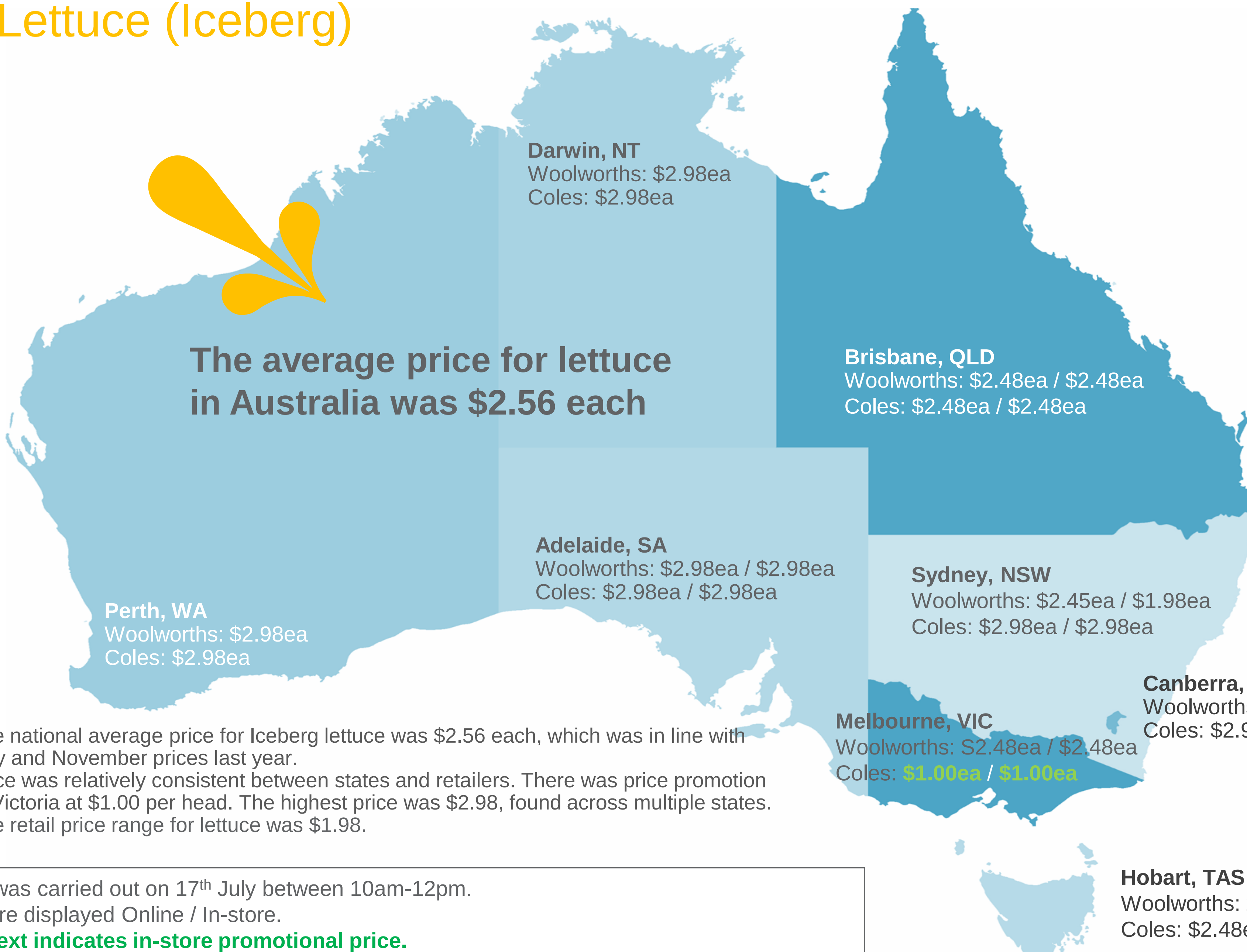


Average amount purchased per shop	Individual Whole Lettuce	Pre-packaged small bag of lettuce	Pre-packaged large bag of lettuce	Individual lettuce leaves	Half lettuce	Quarter lettuce
Wave 6: November 2013	1.2	1.3	1.3	8.5	1.4	1.6
Wave 10: March 2014	1.2	1.5	1.5	12.4	1.7	2.3
Wave 14: July 2014	1.1	1.2	1.3	12.6	1.5	1.5

Q3a. How much <commodity> does this typically equate to?
Sample Wave 6 N=370, Wave 10 N=326 Wave 14 N=315

Online and In-store Commodity Prices

Lettuce (Iceberg)

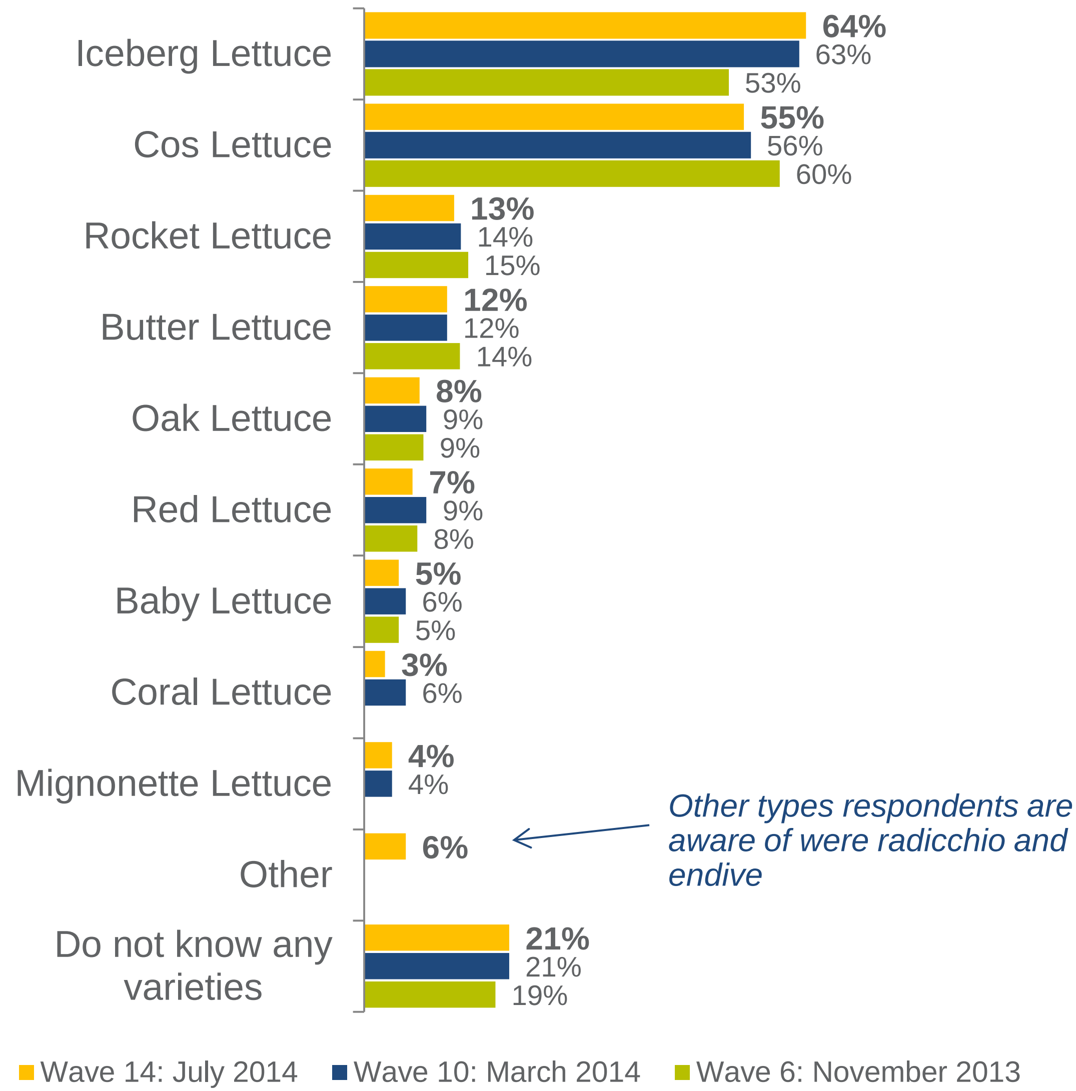


- The national average price for Iceberg lettuce was $2.56 each, which was in line with July and November prices last year.
- Price was relatively consistent between states and retailers. There was price promotion in Victoria at $1.00 per head. The highest price was $2.98, found across multiple states.
- The retail price range for lettuce was $1.98.

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

Spontaneous Commodity Type Awareness

- Awareness of lettuce types remained relatively high, with only one fifth of respondents unable to recall a type.
- Iceberg and Cos lettuce had the greatest recall, consistent with previous waves.
- There was strong recall across multiple varieties.
- Consumers misattribute Rocket as being a type of lettuce.



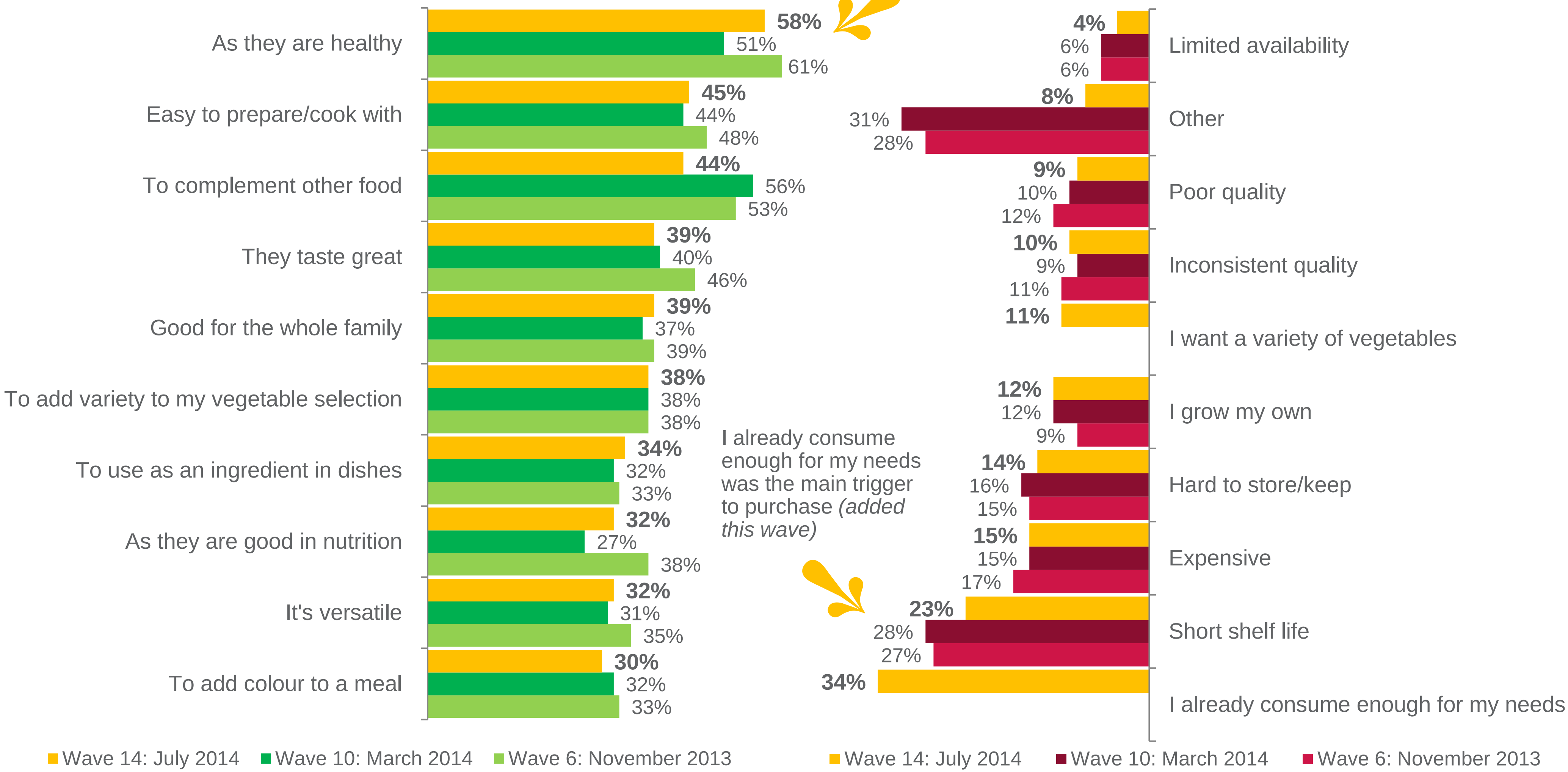
Sample Wave 6 N=370, Wave 10 N=326 Wave 14 N=315
Q6a. What types/varieties of <commodity> are you aware of? (unprompted)

Triggers and Barriers to Purchase

Triggers

Health was the main trigger to purchase, which has increased since Wave 10. Convenience and complementing other food were also reasons to purchase.

Barriers



I already consume enough for my needs was the main trigger to purchase *(added this wave)*

Sample Wave 6 N=370, Wave 10 N=326 Wave 14 N=315
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?

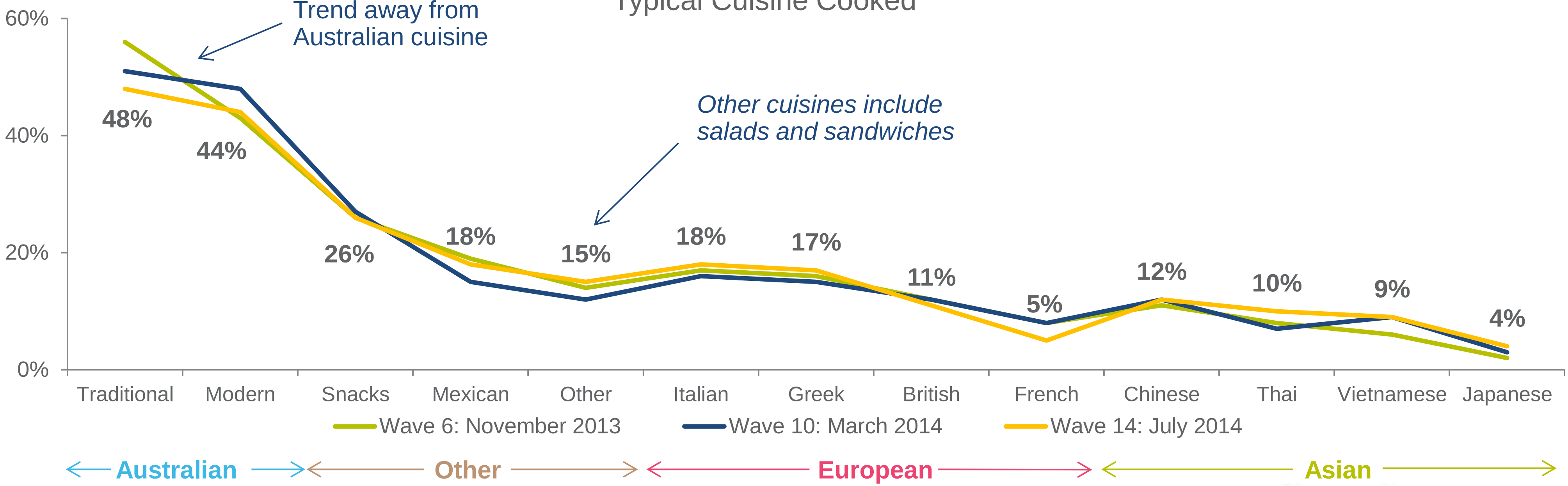
Cooking Cuisine and Occasions

- Australian cuisine remained the most popular for lettuce dishes, however there was a trend away from traditional Australian.
- Weekday lunch and quick meals were the most typical consumption occasions, which is consistent with convenience triggers to purchase.

Wave 14 Top 5 Consumption Occasions

Weekday lunch	44%	▲ Wave 6	▲ Wave 10
Quick meals	43%	▼ Wave 6	▼ Wave 10
Weekday dinner	43%	▲ Wave 6	▬ Wave 10
Weekend lunch	36%	▲ Wave 6	▲ Wave 10
Weekend dinner	36%	▼ Wave 6	▬ Wave 10

Typical Cuisine Cooked



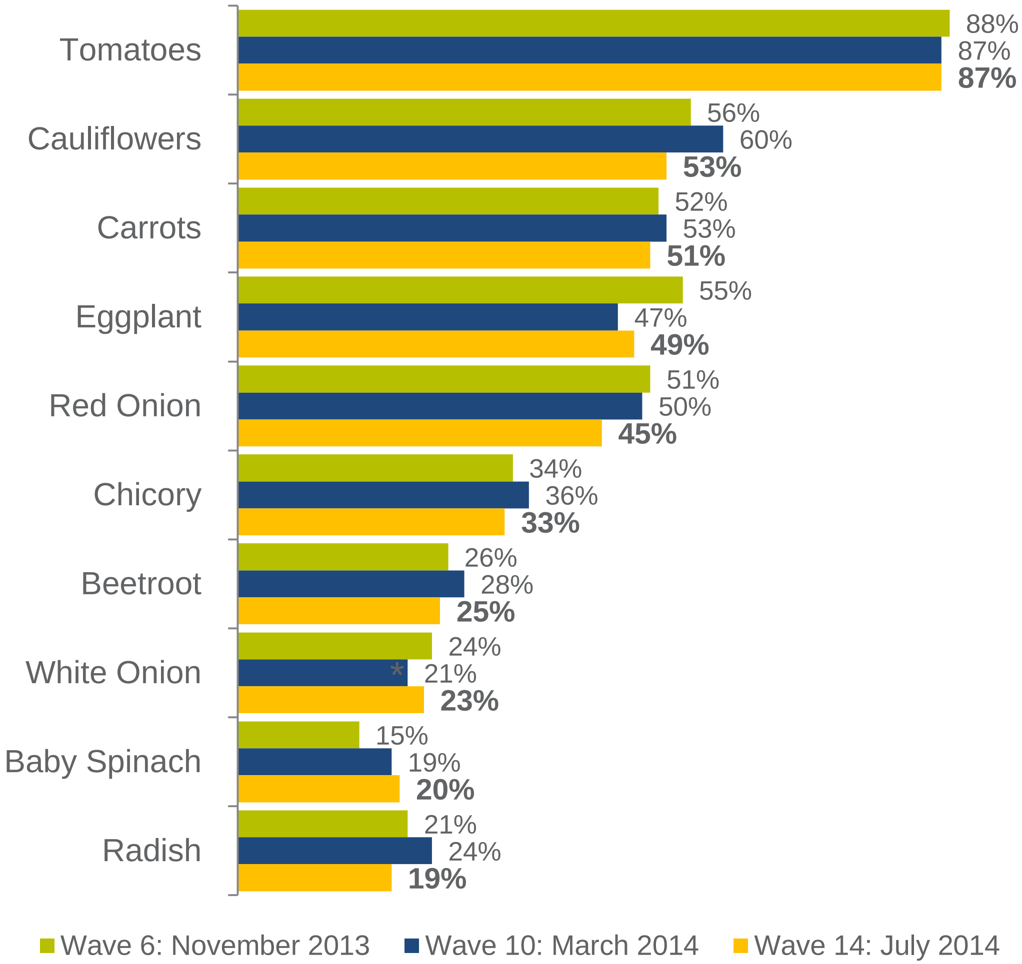
Sample Wave 6 N=370, Wave 10 N=326 Wave 14 N=315
Q10. What cuisines do you cook/consume that use <commodity> ?
Q11. Which of the following occasions do you typically consume/use <commodity> ?

colmar brunton.

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

Cooking Preferences

Top 10 Accompanying Vegetables



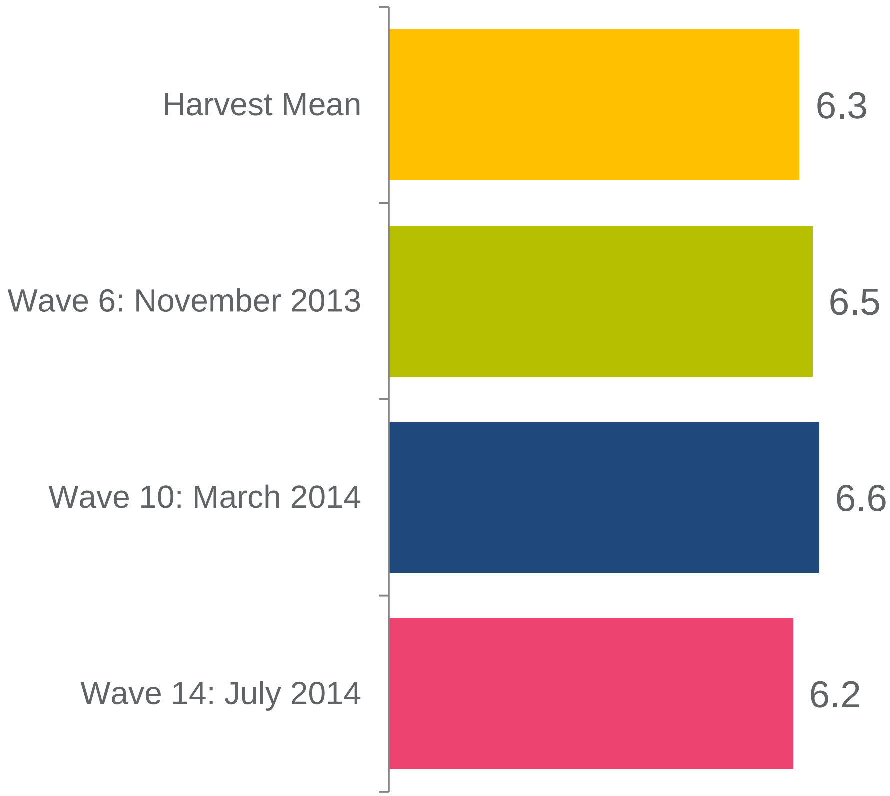
- The majority of respondents consumed lettuce raw.
- Lettuce was typically served with tomatoes, cauliflower and carrots.

Top 10 Cooking Styles			
	Wave 6	Wave 10	Wave 14
Raw	71%	72%	74%
Other- not cooked	23%	23%	20%
Stir frying	6%	3%	7%
Soup	2%	2%	3%
Boiling	1%	2%	3%
Steaming	2%	2%	2%
Sautéing	1%	2%	2%
Shallow Frying	1%	1%	2%
Blanche	1%	2%	2%
Stewing	1%	0%	2%

Sample Wave 6 N=370, Wave 10 N=326 Wave 14 N=315
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?

Importance of Provenance

- Whereas provenance is still relatively important to consumers, this has decreased compared with previous waves and is now lower than the vegetable average (Harvest mean).



Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 6 N=370, Wave 10 N=326 Wave 14 N=315

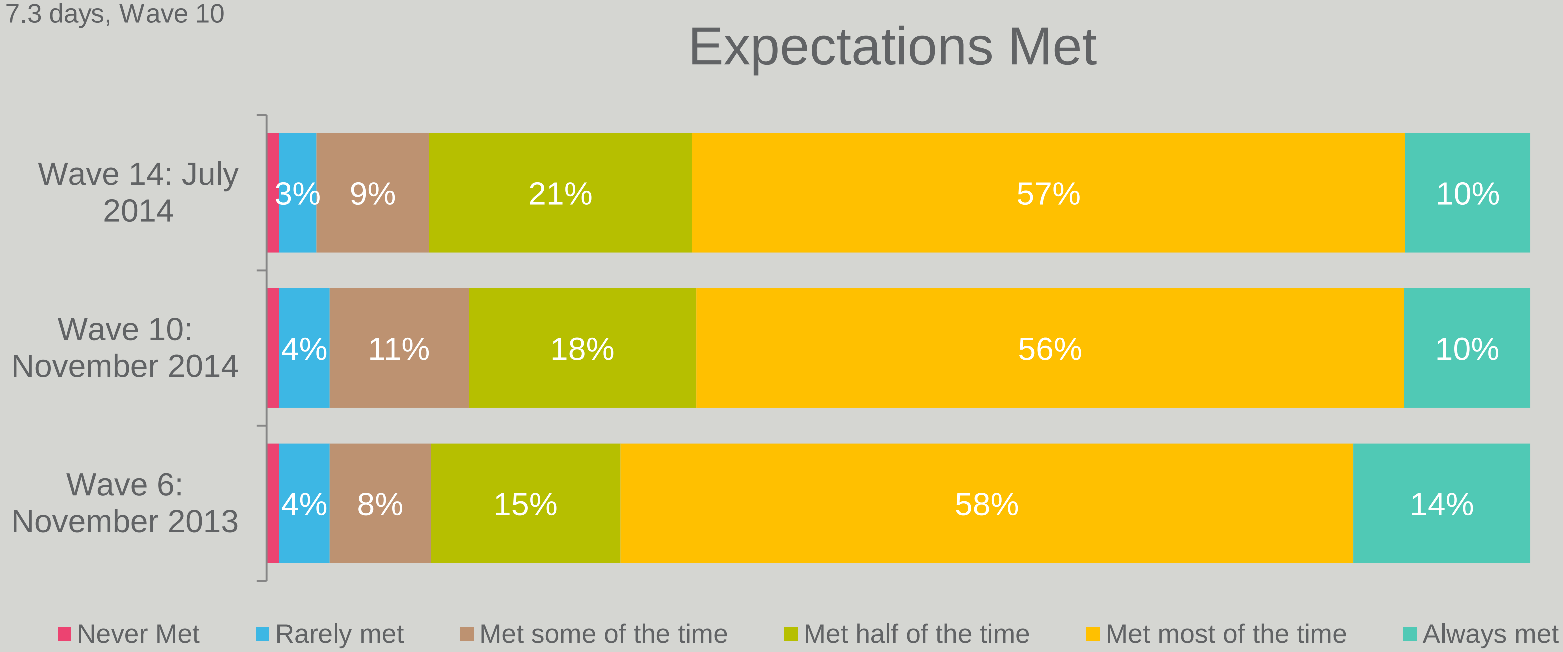
Freshness and Longevity

Expected to stay fresh for **7.5** days

▼ 7.0 days, Wave 6
▼ 7.3 days, Wave 10

⇛ Over the past three waves, longevity of freshness has directionally increased. Consumers perceived that lettuce will last for a week.

⇛ However, this increased freshness is not always being met. Only 10% of respondents indicated that the freshness longevity was always met.



Sample Wave 6 N=370, Wave 10 N=326 Wave 14 N=315
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> ?

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

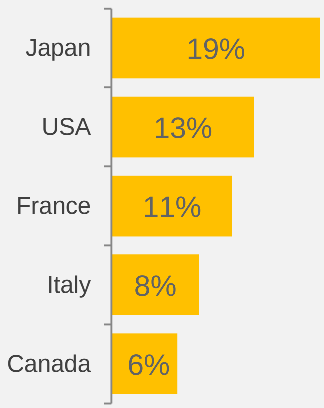
Trends: Lettuce

Lettuce Global NPDs

May – July 2014

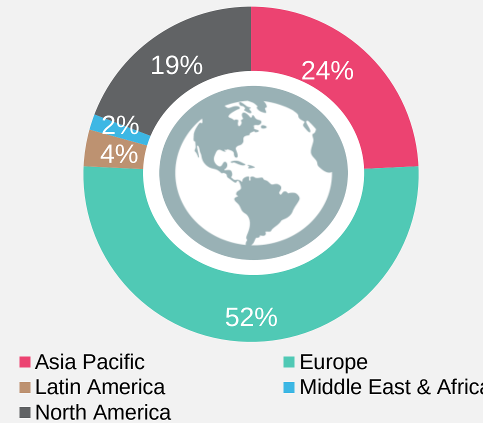
There were 198 products launched globally over the last 3 months that contained lettuce as a product. The majority of these launches occurred in Europe and Asia Pacific. The launch categories were mainly meals, fruit and vegetables and juice drinks. Ease of use the main claim used for products.

Country

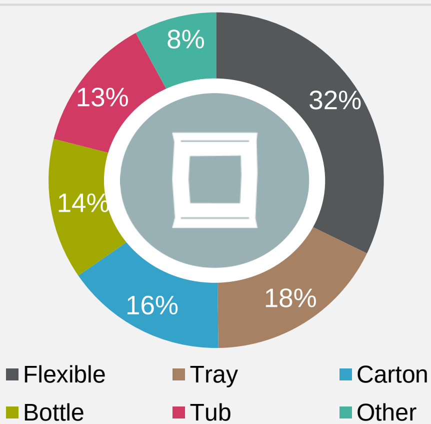


198 Global NPDs

Region



Top Pack Formats



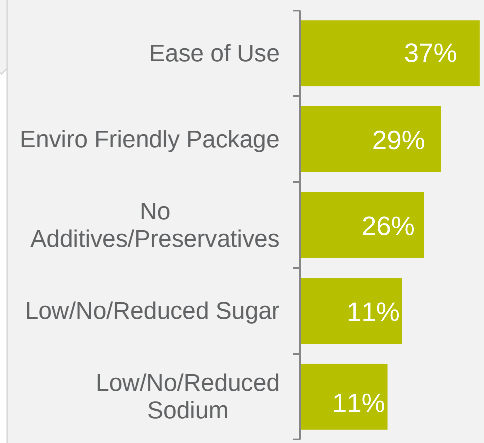
Categories

Meals 41%

Fruit & Vegetables 26%

Juice Drinks 26%

Top Claims



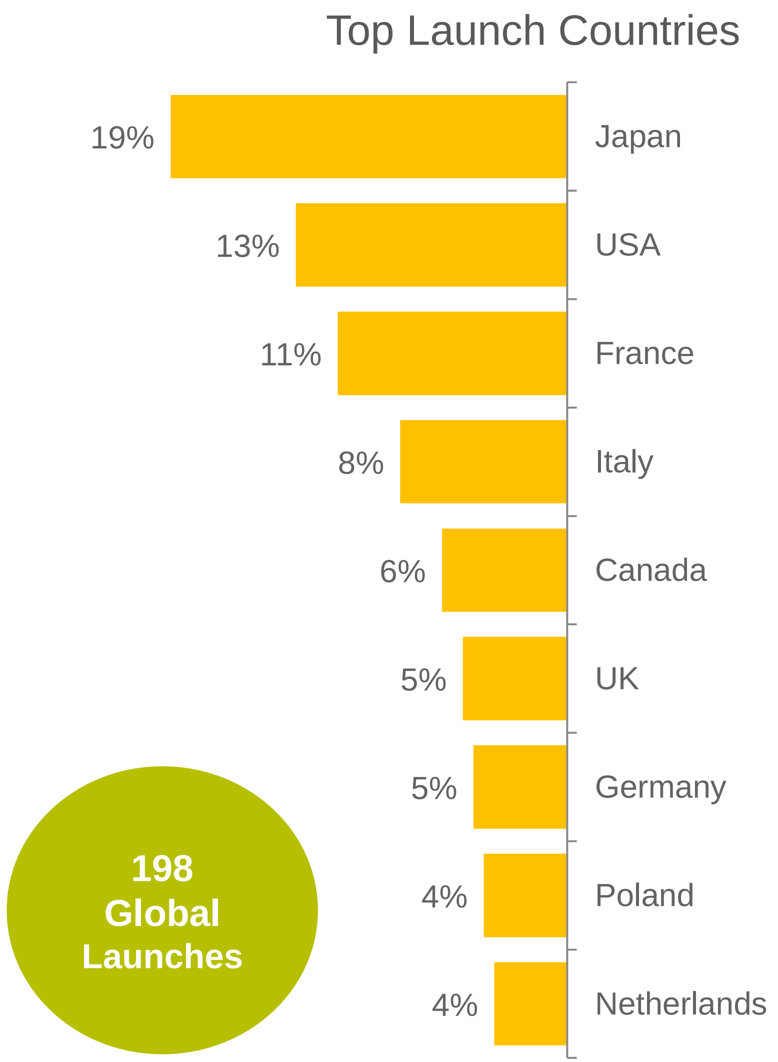
Lettuce Product Launches:
Last 3 Months (May – July 2014)
Summary

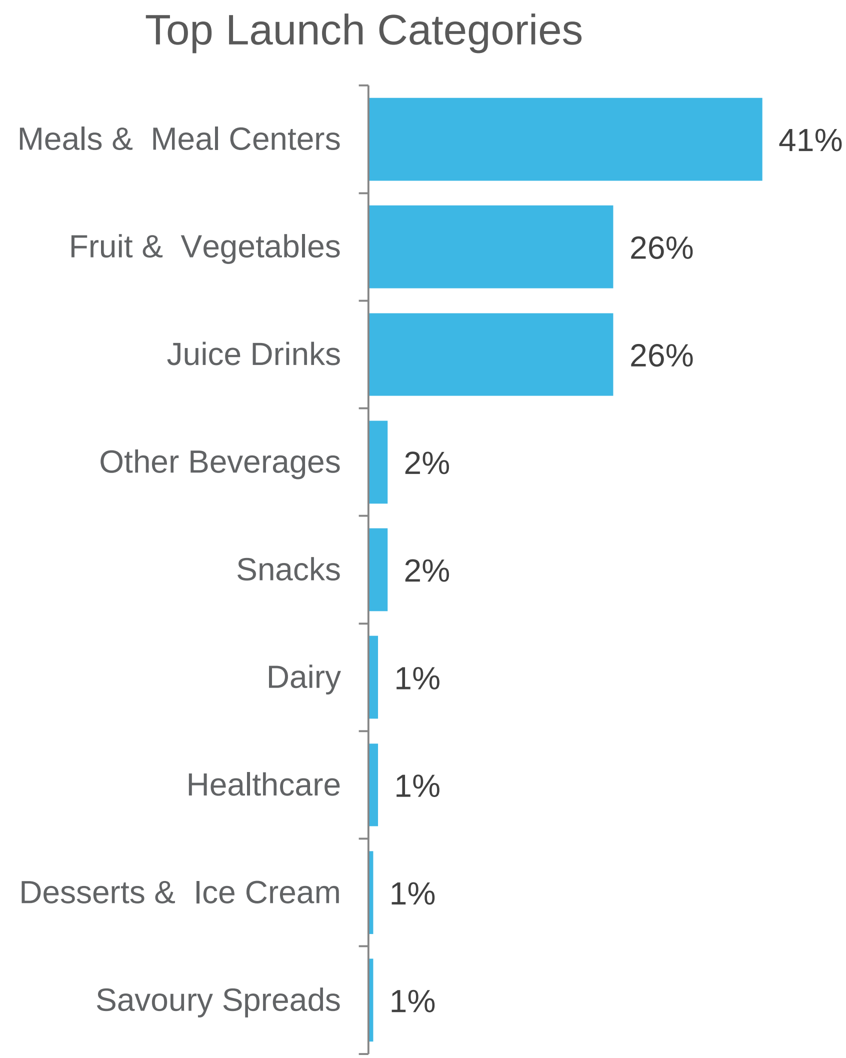
- Globally, there were 198 products launched, this was higher than previous trends.
- There were no products containing lettuce as an ingredient launched in Australia over the last three months.
- The majority of products launched in the last 3 months were in Europe (52%) and Asia Pacific (24%).
- Flexible formats (32%) and trays (18%) were the main types of packaging used for products launched over the last three months.
- The top categories for launches were meals (41%), fruit and vegetables (26%) and juice drinks (26%), which was consistent with previous trends.
- The key claims used over the past three months were ease of use (37%), environmentally friendly packaging (29%) and no additives and preservatives (26%).
- The most innovative launches found were purifying tablets launched in France. Examples of these can be found over the next slides.

Source: Mintel (2014)

Lettuce SKUs
Country, Region & Categories

- Key countries for launches were Japan, USA and France.
- Consistent with previous trends, key categories for launches were meals, fruit and vegetables and juice drinks.





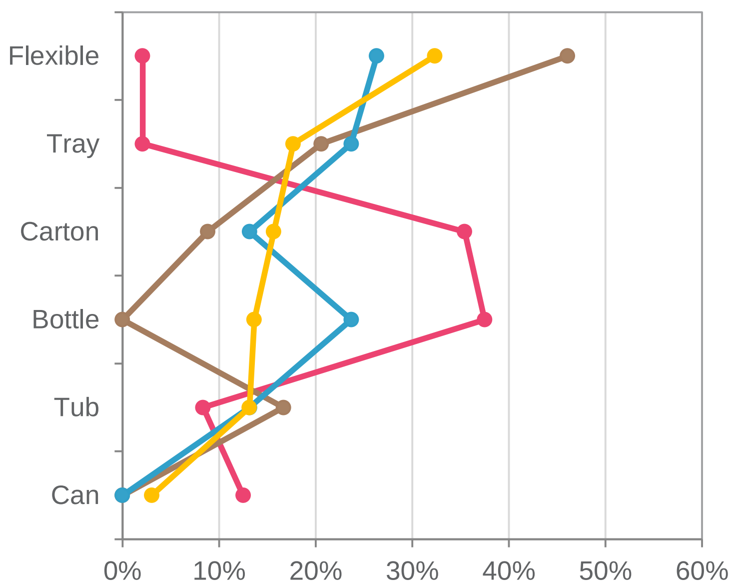
colmar brunton.

Number of Global Lettuce NPDs for the L3M N=198

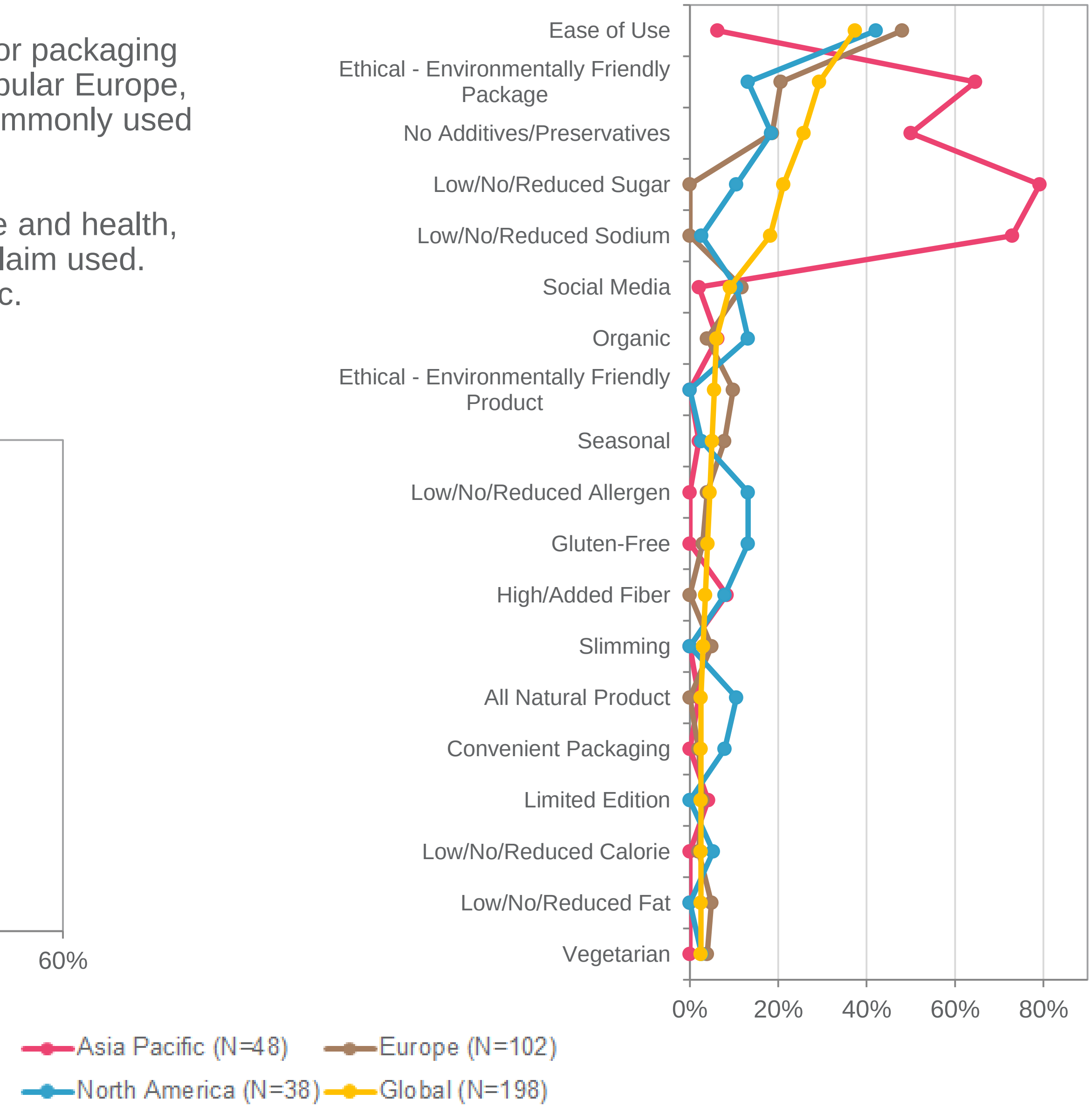
Lettuce SKUs
Top Claims & Pack Formats Used

- There was variation across regions for packaging used. Flexible formats were most popular Europe, whereas cartons and bottles were commonly used in Asia Pacific.
- Key claims were around convenience and health, with ease of use the most common claim used. Health claims were key in Asia Pacific.

Top Packs Used



Top Claims Used



Number of Global Lettuce NPDs for the L3M N=198
Only regions with n >30 are displayed

Innovative Lettuce Launches:
L3M (May – July 2014)

7-Eleven Daily Fresh Vegetable Twelve Vegetable Salad (Taiwan)

7-Eleven Daily Fresh Vegetable Twelve Vegetable Salad has been relaunched. This ready to eat product comprises multiple vegetables and raisins, is free from preservatives, and retails in a 184g pack.

Claims:
Ease of Use, No Additives/Preservatives

V8 Original Vegetable Cocktail (Canada)

V8 Original Vegetable Cocktail has been repackaged in a newly designed 1.89L pack. The gluten free product provides two servings of vegetables from each 250ml serving.

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

Archer Farms Taco Toppings (USA)

Archer Farms Taco Toppings comprises tomatoes, lettuce, cheese and green onions. The product retails in a 13-oz. pack.

Claims:
N/A

Natui Fresh & Ready Caesar Salad with Grilled Chicken (Italy)

Natui Fresh & Ready Caesar Salad con Pollo Grigliato (Caesar Salad with Grilled Chicken) is now available. The product retails in a 250g pack, containing oil dressing and a fork.

Claims:
N/A

Source: Mintel (2014)

Innovative Lettuce Launches:
L3M (May – July 2014)

Forté Pharma Turbo Draine Draining & Purifying Tablets (France)

Forté Pharma Turbo Draine Comprimés, Draine & Purifie (Draining & Purifying Tablets) have been repackaged. They contain natural active ingredients, are scientifically tested and are said to give 85% of satisfaction. The product is aimed at people who do not feel fit in their clothes.

Claims:
Low/No/Reduced Allergen, Botanical/Herbal, Slimming, Ease of Use, Gluten-Free, Digestive (Functional)

Menu From Waitrose Mushroom Open Ravioli (UK)

Menu From Waitrose Mushroom Open Ravioli has been relaunched under a new brand name, previously known as Menu From Waitrose Mains For 2, and in a newly designed 650g recyclable pack.

Claims:
Vegetarian, Ethical - Environmentally Friendly Package

Sodebo Salade & Compagnie Bergerac Salad (France)

Sodebo Salade & Compagnie Bergerac Pomme de Terre, Salade, Gésiers de Canard, Tomate et Noix (Bergerac Salad) is made with potatoes, lettuce, duck gizzard, tomato and walnut and includes a bottle of olive oil and raspberry vinaigrette, three breadsticks and a plastic fork.

Claims:
Low/No/Reduced Calorie

Instinct Dessaint Fraîcheur 1.2.3 Salade (France)

Instinct Dessaint Fraîcheur 1.2.3 Salade Saumon Fromage Frais Sauce Bulgare (Salmon, Fromage Frais & Fromage Blanc Sauce Salad) contains separate compartments of salmon and cheese, cooked pasta and mixed lettuce leaves that can be mixed according to taste. The salmon, cheese and pasta can also be served warmed in the microwave for 25 seconds.

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

Source: Mintel (2014)

Innovative Lettuce Launches:
L3M (May – July 2014)

AH Sla Compleet Japanese Salad (Netherlands)

AH Sla Compleet Japanse Salade (Japanese Salad) contains cucumber, rucola, lambs lettuce, radish, soya beans, mix of wakame- and sesame seed, and a soya-ginger dressing. The milk free product retails in a 238g pack containing one 40g sachet of soya ginger dressing and one 8g sachet of wakame sesame seed mix.

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

Kagome Salt-Free Vegetable & Tomato Mix Juice (Japan)

Kagome Salt-Free Vegetable & Tomato Mix Juice has been repackaged in a recyclable 720ml bottle. The product is made with 11 types of vegetables, is free from added sugar, salt, colouring and preservative. Launched on April 15, 2014. RRP not available.

Claims:
No Additives/Preservatives, Low/No/Reduced Calorie, High/Added Fiber, Ethical - Environmentally Friendly Package, Low/No/Reduced Sugar, Low/No/Reduced Sodium

Aman Prana Orac Botanico-Mix (Netherlands)

Aman Prana Orac Botanico-Mix is a mix of nine herbs with the highest ORAC value as well as sumac, Khoisan flower salt and four different types of seaweed. It also contains antioxidants, micro nutrients and alkaline for radiant beauty. The organic product is said to contain no junk and retails in a 200g jar, which bears the 100% green leaf label.

Claims:
Beauty Benefits, No Additives/Preservatives, Botanical/Herbal, Ethical - Environmentally Friendly Product, Organic, Antioxidant

Bloody Revolution Original Gourmet Bloody Mary Mix (USA)

Bloody Revolution Original Gourmet Bloody Mary Mix is comprised of high quality natural ingredients. It can be prepared with just the addition of alcohol and chilled. This product retails in a 32-fl. oz. pack.

Claims:
Ease of Use

Source: Mintel (2014)

Sweet Corn.

Purchase and Consumption Behaviour

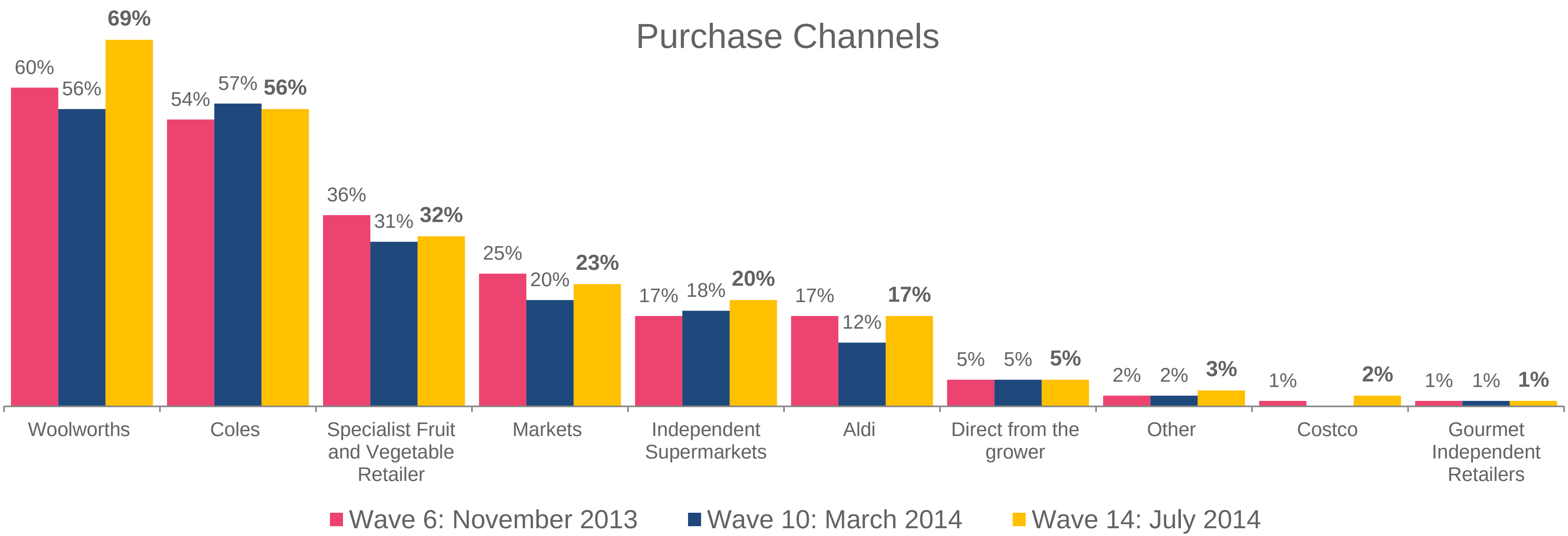
Average Purchase
3.4 times per month

▲ 3.6 times, Wave 6
▼ 3.0 times, Wave 10

Average Consumption
6.2 times per month

▲ 6.5 times, Wave 6
▼ 5.8 times, Wave 10

- In Wave 14, purchase and consumption frequency has improved from the previous wave, approaching similar levels to those recorded in Wave 6.
- Woolworths has increased substantially from the previous waves as the preferred purchase channel for sweet corn.



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 6 N=324, Wave 10 N=301, Wave 14 N=308

colmar brunton.

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

Average Spend and Price Sensitivity

Average weight of purchase

The typical consumer purchased **900g** of sweet corn, which was consistent with previous waves.

— 900g, Wave 6
— 900g, Wave 10

Recalled last spend

Recalled last spend on sweet corn purchase was **$4.30.** This was a substantial increase from previous waves.

▼ $3.92, Wave 6
▼ $3.62, Wave 10

Value for money

Consumers' perceived value for money was good **(6.1/10)**, however represents a decrease from previous waves.

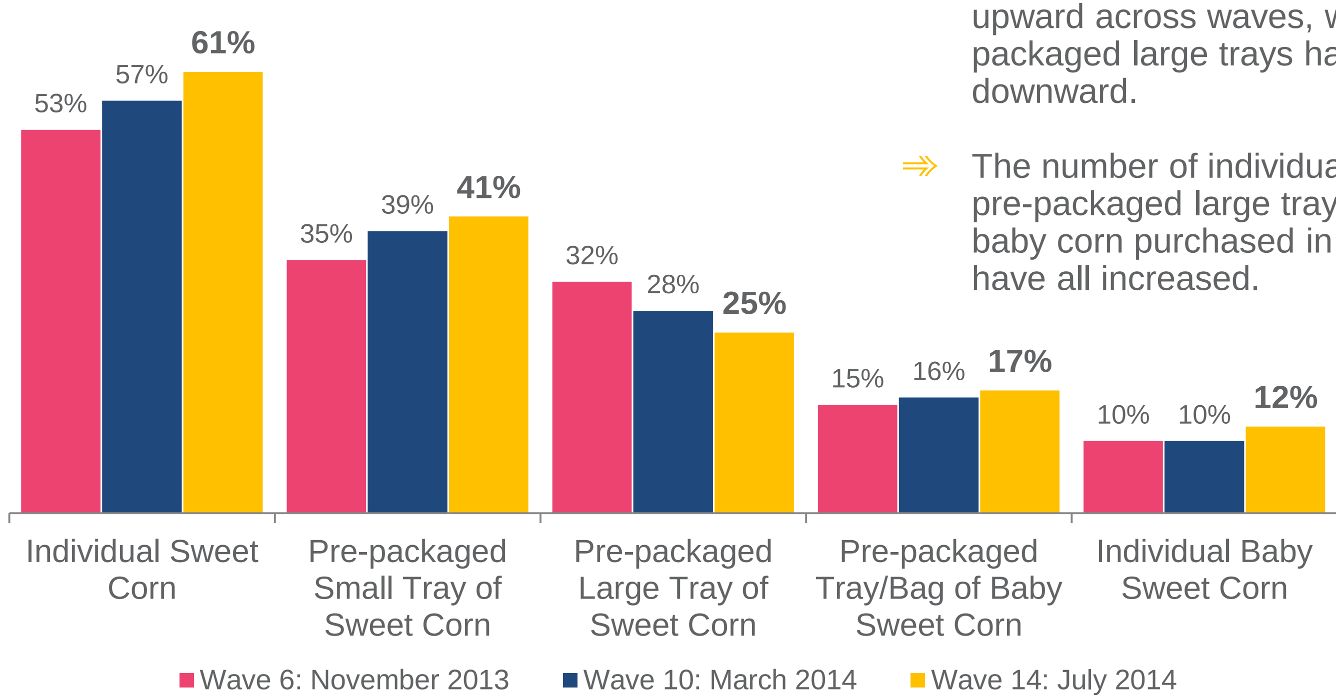
▲ 6.5/10, Wave 6
▲ 6.5/10, Wave 10

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 6 N=324, Wave 10 N=301, Wave 14 N=308

colmar brunton.

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

Pack Formats Purchased



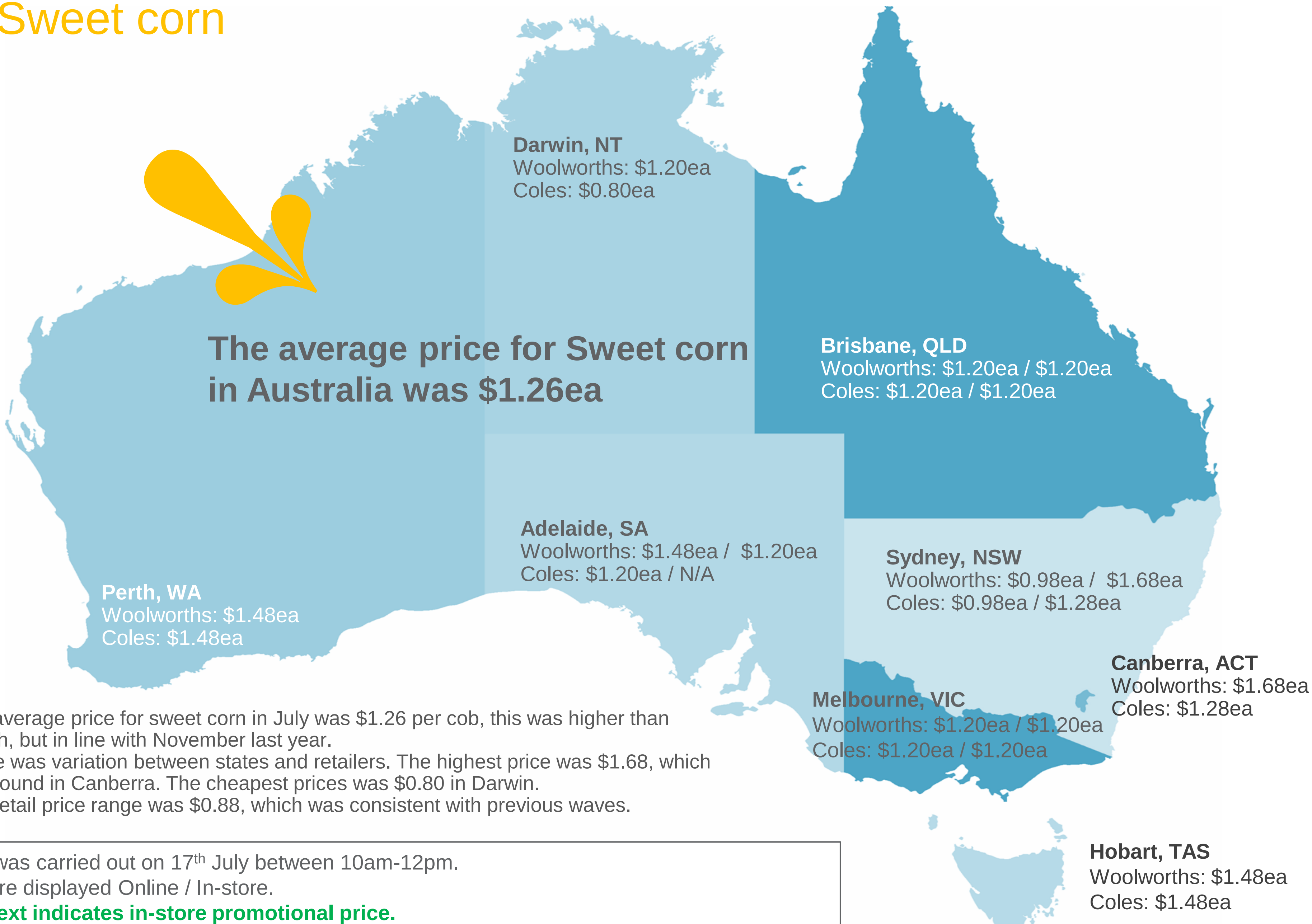
- Individual sweet corn, and pre-packaged small trays of sweet corn have trended upward across waves, while pre-packaged large trays have trended downward.
- The number of individual sweet corn, pre-packaged large trays and individual baby corn purchased in a single visit have all increased.

Average Amount Purchased	Individual Sweet Corn	Pre-package Small Tray	Pre-packaged Large Tray	Pre-packaged Baby Sweet Corn	Individual Baby Corn
Wave 6: November 2013	3.2	1.8	1.6	2.6	4.3
Wave 10: March 2014	3.4	1.7	1.7	1.8	5.6
Wave 14: July 2014	3.5	1.8	1.8	2.5	5.8

Q3a. How much <commodity> does this typically equate to?
Sample Wave 6 N=324, Wave 10 N=301, Wave 14 N=308

Online and In-store Commodity Prices

Sweet corn

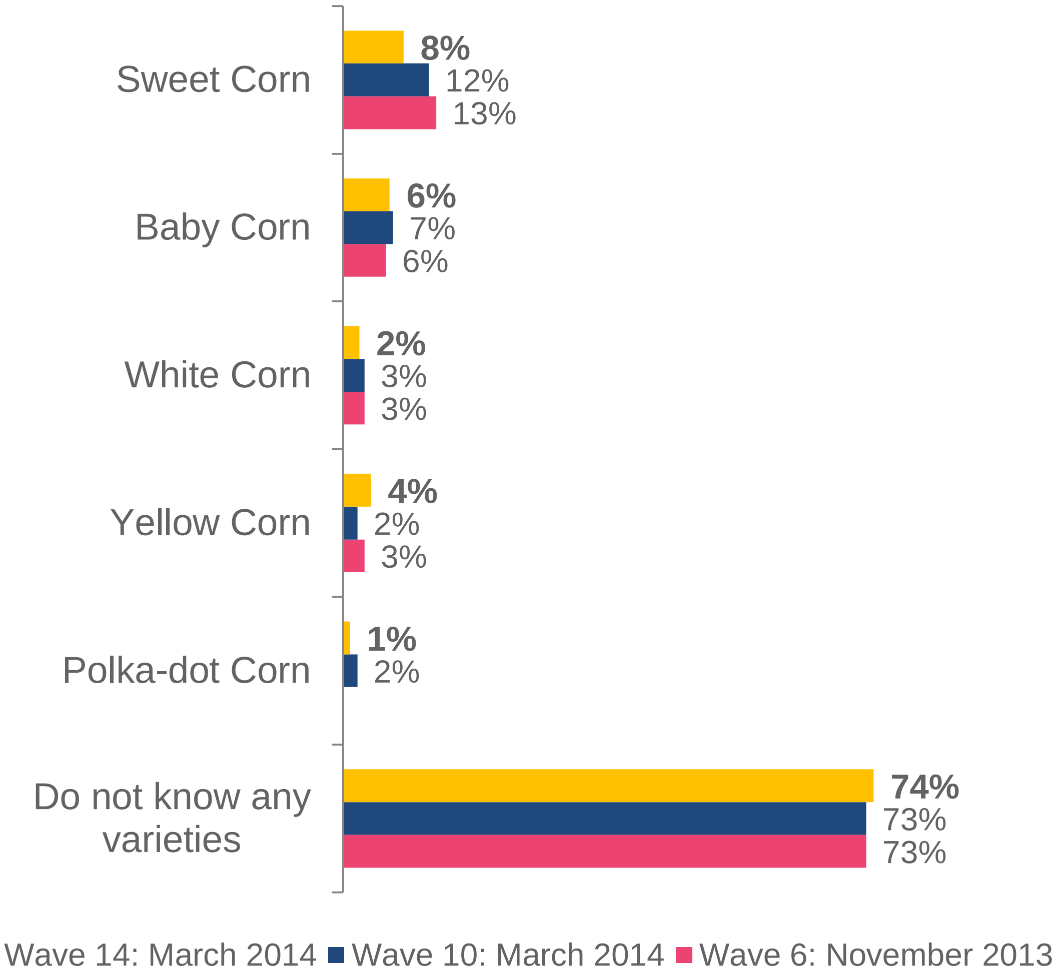


- The average price for sweet corn in July was $1.26 per cob, this was higher than March, but in line with November last year.
- There was variation between states and retailers. The highest price was $1.68, which was found in Canberra. The cheapest prices was $0.80 in Darwin.
- The retail price range was $0.88, which was consistent with previous waves.

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

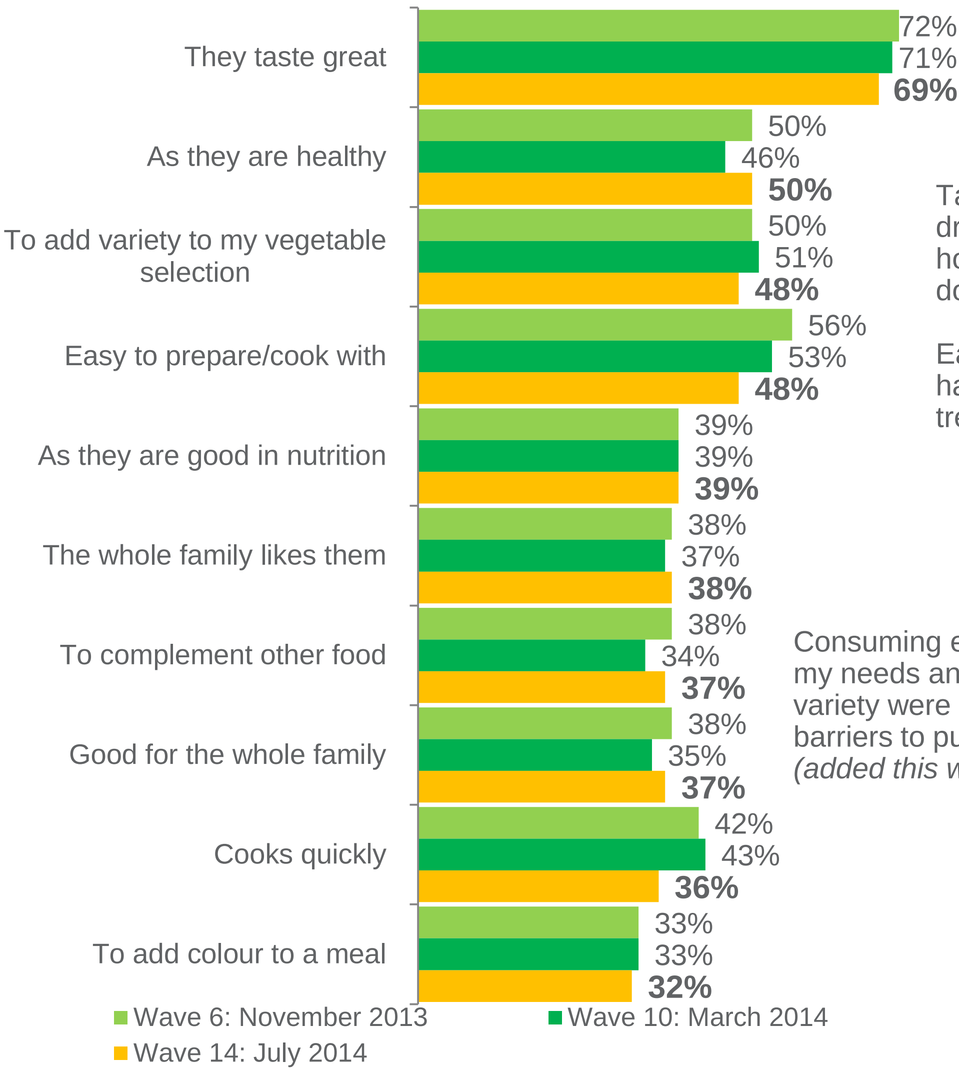
Spontaneous Commodity Type Awareness

- Awareness of sweet corn types remained very low, consistent with previous waves. ¾ of consumers indicated they were not aware of any varieties of Sweet corn.
- Sweet corn awareness is on a downward trend, while other types are consistently low across trends.



Q6a. What varieties of <commodity> are you aware of? (unprompted)
Sample Wave 6 N=324, Wave 10 N=301, Wave 14 N=308

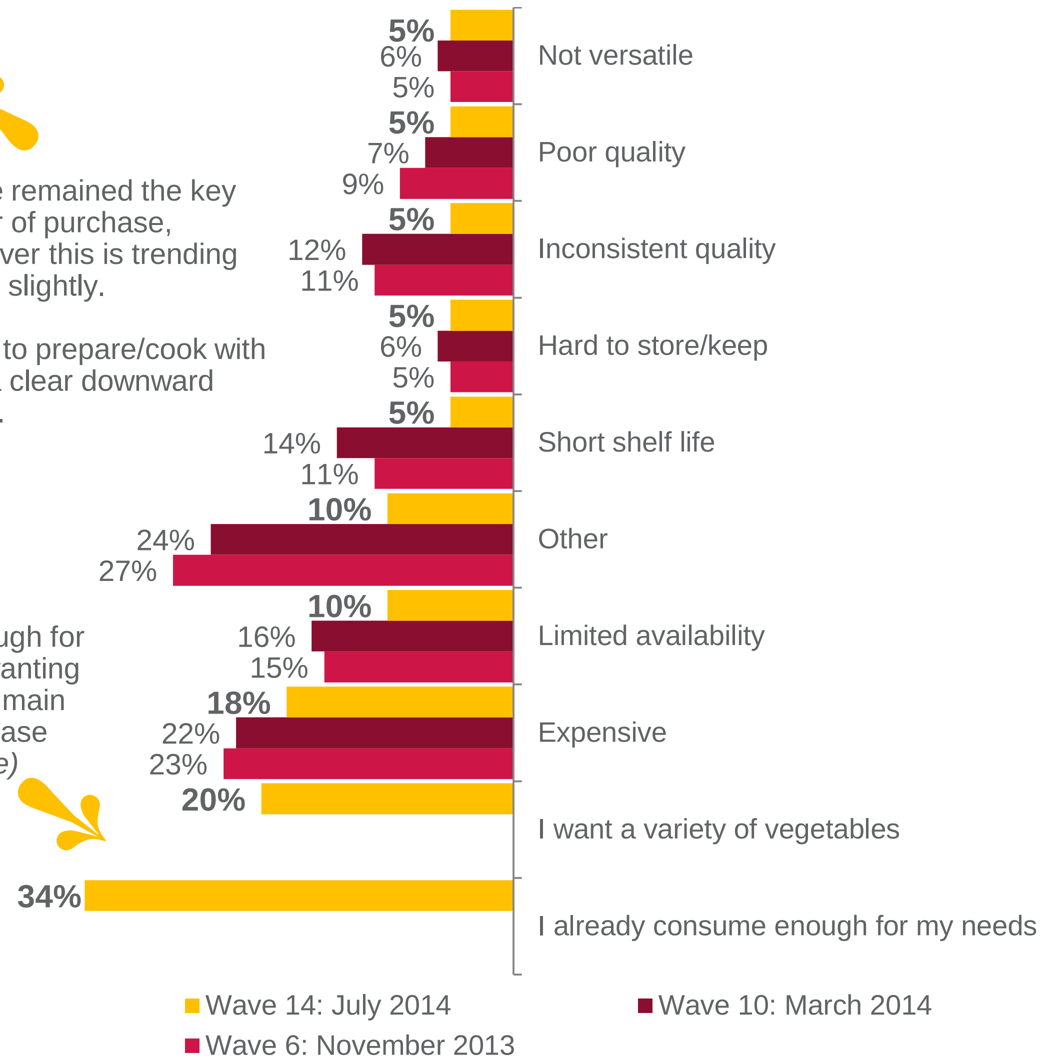
Triggers and Barriers to Purchase



Taste remained the key driver of purchase, however this is trending down slightly.

Easy to prepare/cook with has a clear downward trend.

Consuming enough for my needs and wanting variety were the main barriers to purchase *(added this wave)*



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 6 N=324, Wave 10 N=301, Wave 14 N=308

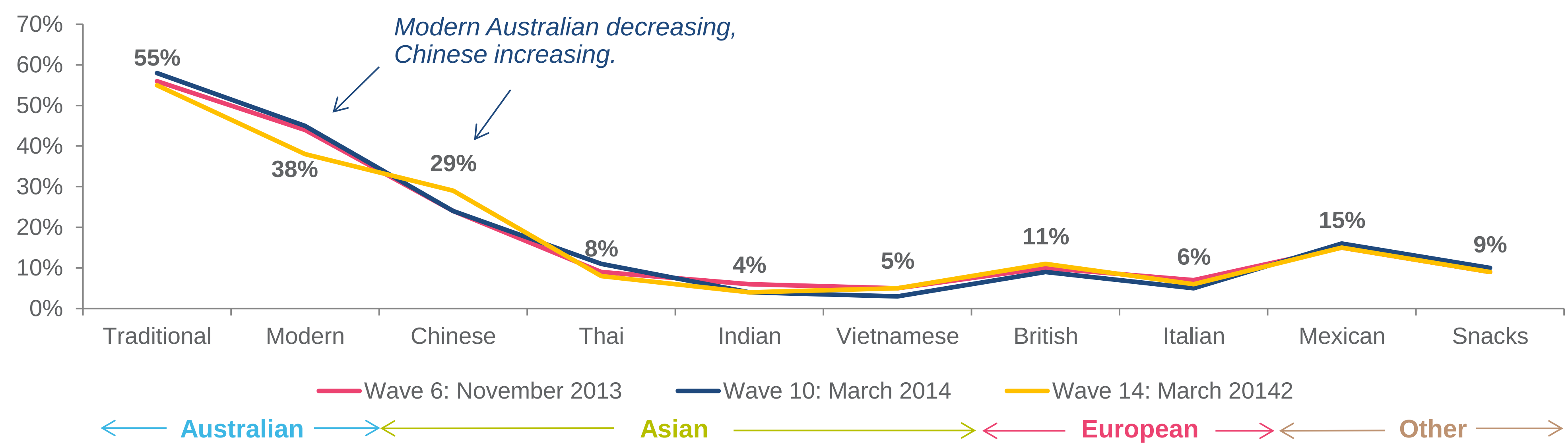
Cooking Cuisine and Occasions

- Australian cuisine remained the most common cuisine cooked, however Modern Australian has decreased, and Chinese cuisine has increased in Wave 14.
- Dinner was the typical consumption occasion, with over half of consumers eating sweet corn for weekday dinner.

Wave 14 Top 5 Consumption Occasions

Occasion	Wave 14	vs Wave 6	vs Wave 10
Weekday Dinner	52%	▲ Wave 6	▲ Wave 10
Family meals	37%	▲ Wave 6	▲ Wave 10
Weekend Dinner	34%	▲ Wave 6	— Wave 10
Quick Meals	26%	▲ Wave 6	▼ Wave 10
Everyday	24%	▼ Wave 6	▼ Wave 10

Typical Cuisine Cooked

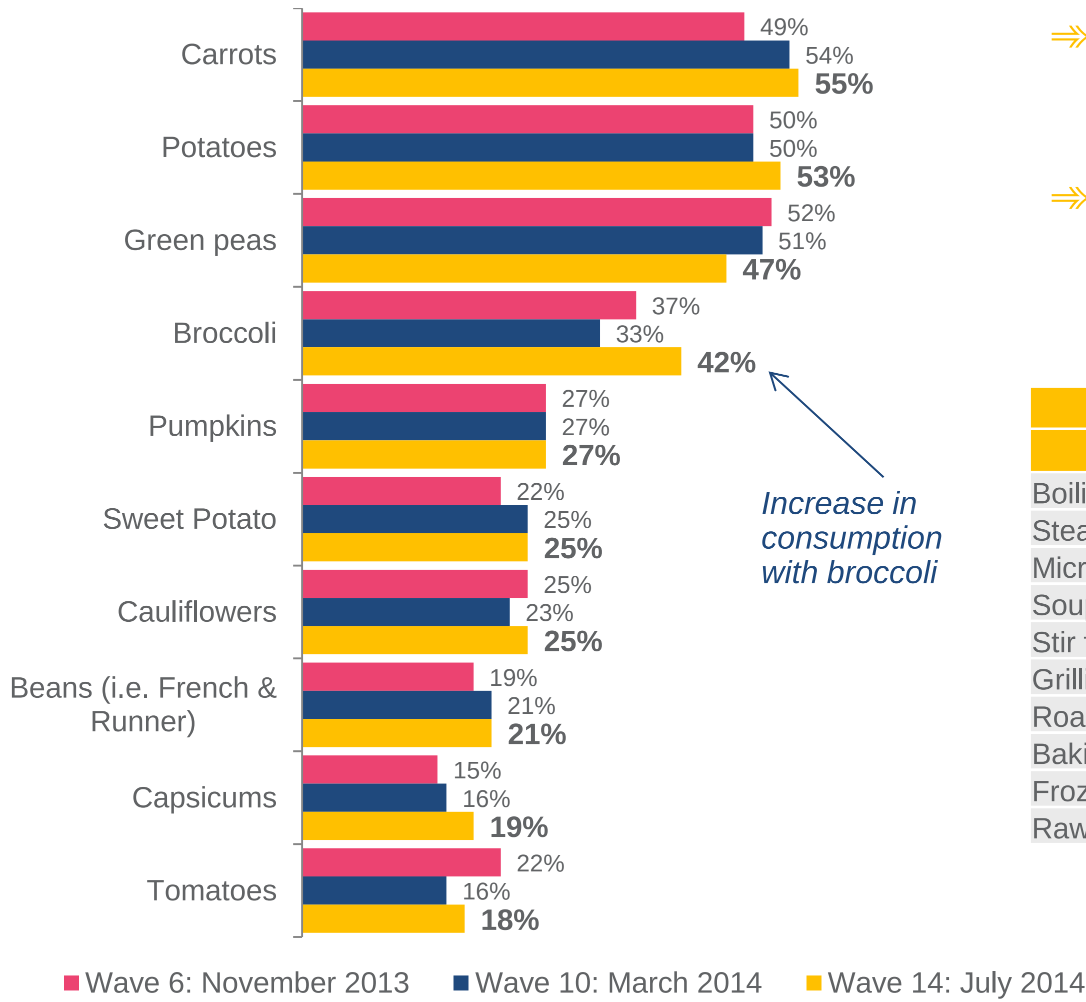


Sample Wave 6 N=324, Wave 10 N=301, Wave 14 N=308
Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?

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

Cooking Preferences

Top 10 Accompanying Vegetables



- Sweet corn was most commonly served with carrots, potatoes and green peas. This was consistent with previous trends.
- Over half the consumers boiled their corn. Steaming and microwave were also popular cooking techniques.

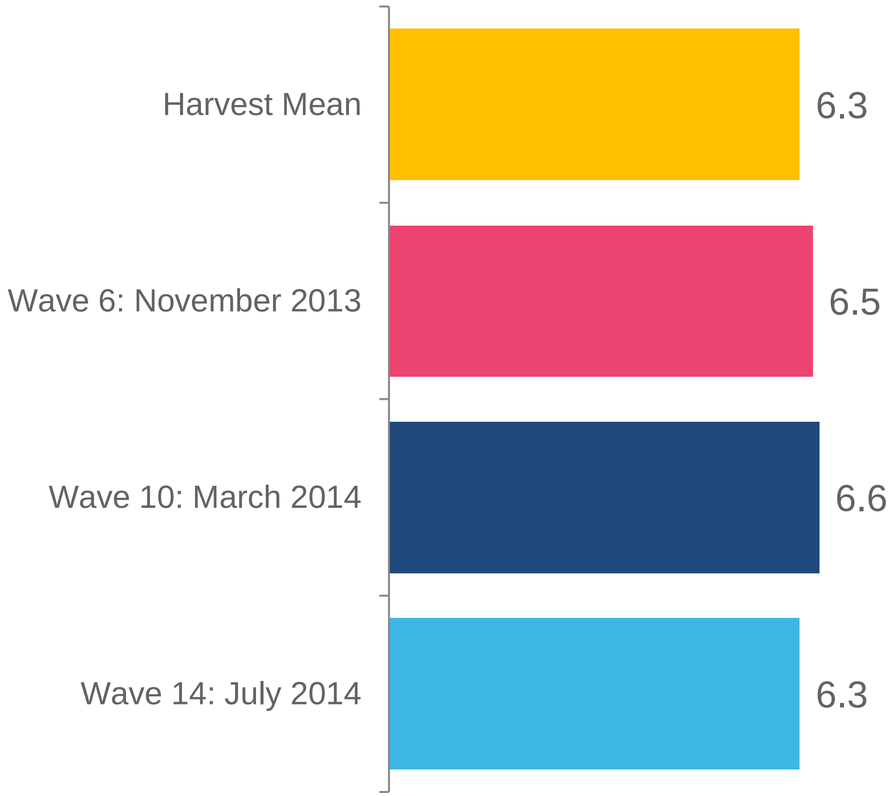
Top 10 Cooking Styles

	Wave 6	Wave 10	Wave 14
Boiling	54%	51%	54%
Steaming	41%	42%	39%
Microwave	33%	30%	33%
Soup	13%	11%	19%
Stir frying	16%	14%	18%
Grilling	12%	10%	12%
Roasting	10%	9%	9%
Baking	6%	3%	7%
Frozen	5%	5%	7%
Raw	7%	5%	6%

Sample Wave 6 N=324, Wave 10 N=301, Wave 14 N=308
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?

Importance of Provenance

- Importance of provenance had slightly decreased since previous waves, but was still on trend with the Harvest average for all commodities.



AUSTRALIAN MADE®

Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 6 N=324, Wave 10 N=301, Wave 14 N=308

Freshness and Longevity

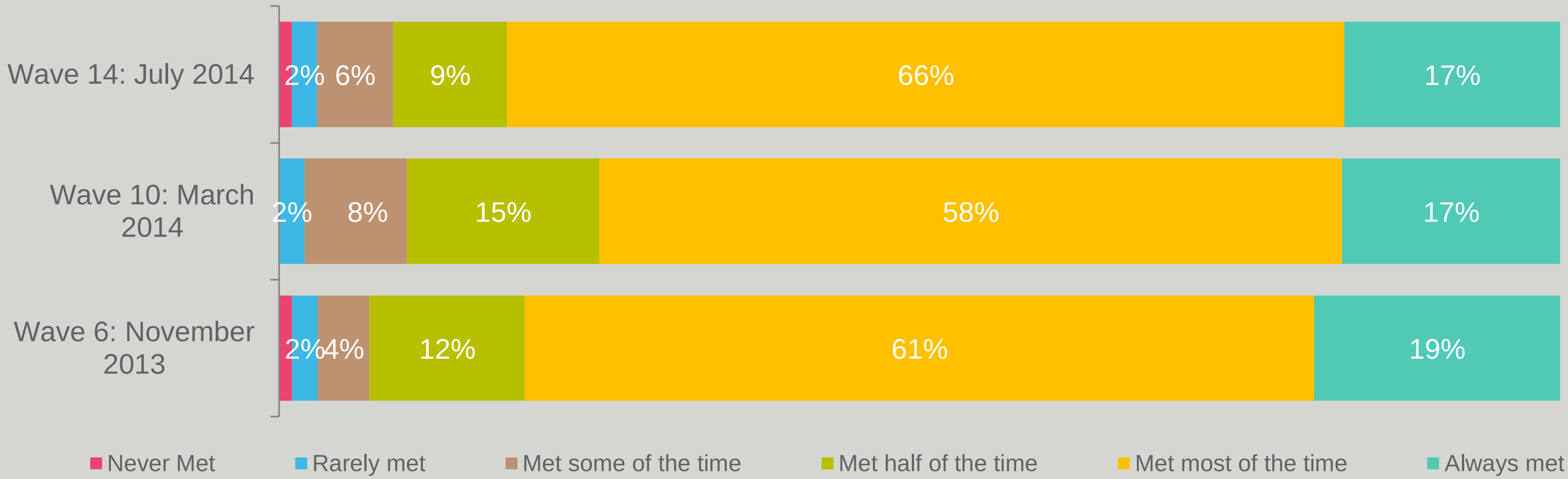
Expected to stay fresh for **8.0** days

- 7.6 days, Wave 6
- 7.7 days, Wave 10

⇛ Over the past three months there has been a trend towards increased longevity of sweet corn freshness.

⇛ Two thirds of consumers indicated that this freshness was met most of the time, which has increased from previous waves.

Expectations Met



Sample Wave 6 N=324, Wave 10 N=301, Wave 14 N=308
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> ?

colmar brunton.

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

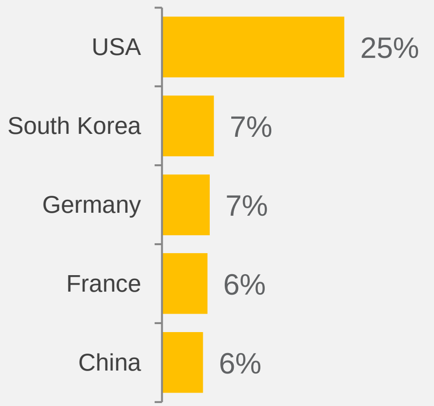
Trends:
Sweet Corn

Sweet Corn Global NPDs

May – July 2014

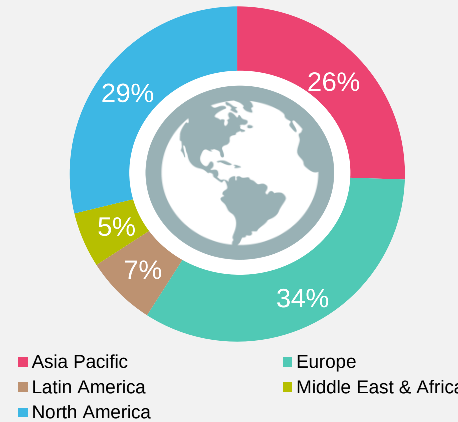
There were 337 sweet corn products launched globally over the last three months. The majority of launches were in USA. Categories for launches were meals, baked goods and snacks. Key packaging for sweet corn products was flexible formats.

Country

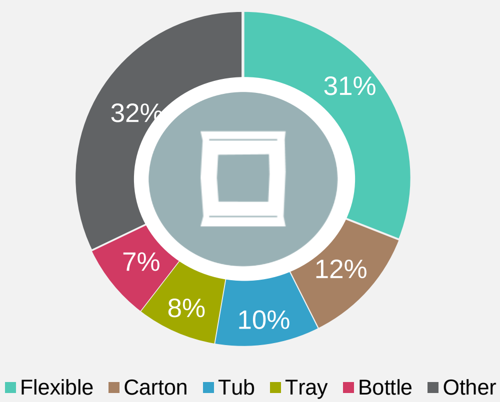


337 Global NPDs

Region



Top Pack Formats



Categories

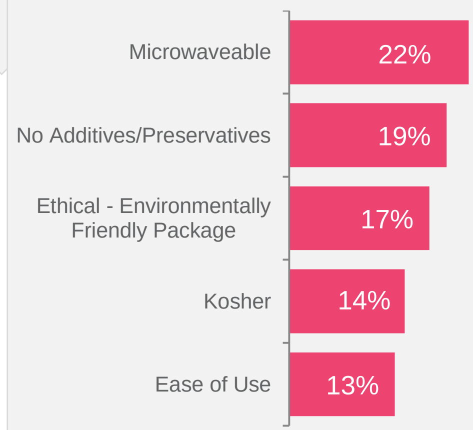
Meals 20%

Bakery 12%

Snacks 12%

Fruit & Vegetables 10%

Top Claims



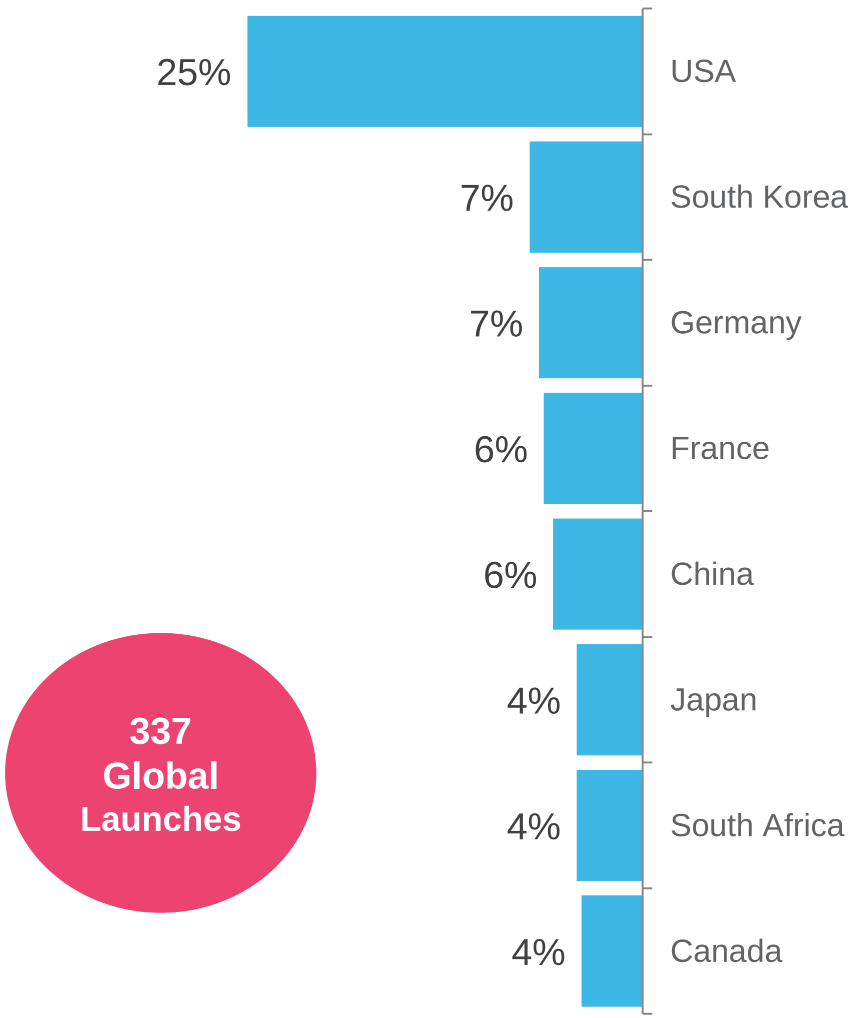
Sweet Corn Product Launches:
Last 3 Months (May – July 2014)
Summary

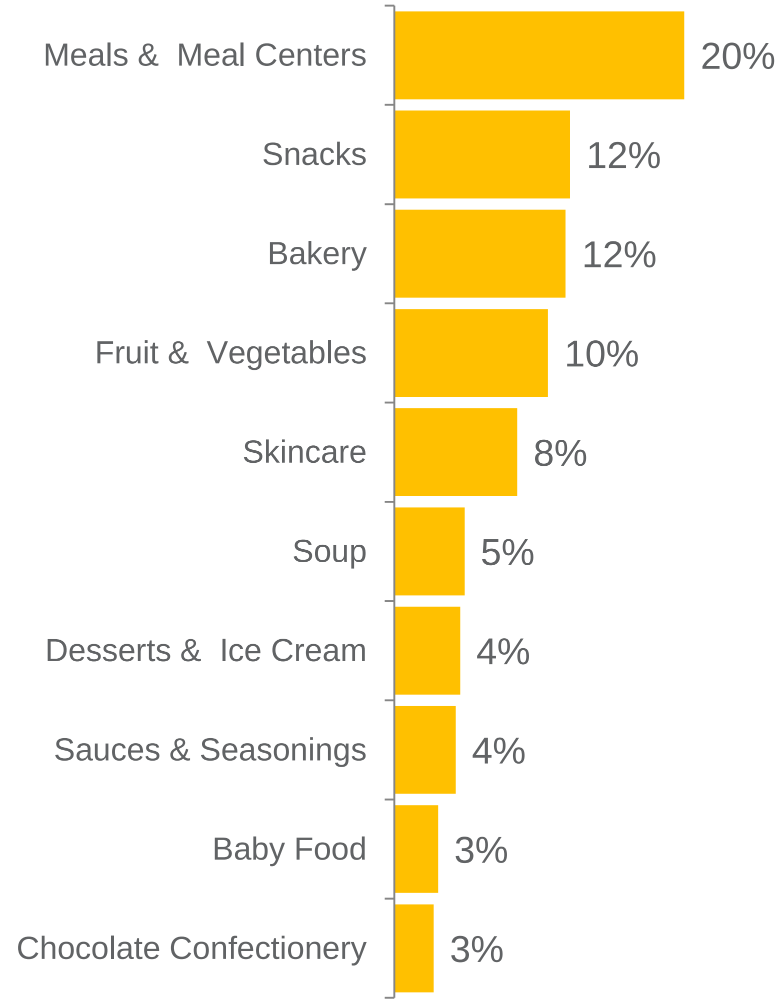
- There were 337 products launched in the last 3 months globally that contained sweet corn as an ingredient. This was consistent with previous trends.
- There were three products launched in Australia over the past three months, however none were particularly innovative.
- Consistent with previous months, Europe (34%), North America (29%) and Asia Pacific (26%) were the key region for launches.
- Flexible packaging 31%) remained the most common format used for products.
- The main categories for launches were meals (20%), bakery goods (12%) and snacks (12%).
- Claims used on products highlighted convenience; microwaveable (22%) and ease of use (13%) and health; no additives/preservatives (19%) and environmentally friendly packaging (17%).
- The most innovative products launched were oats and corn soup mix and sweet corn flavoured biscuit sticks. Examples of these can be found in the following pages.

Source: Mintel (2014)

Sweet Corn SKUs
Country & Categories

- Consistent with previous trends, USA was the key country for sweet corn product launches.
- The key categories for launches were meals, snacks and baked goods.





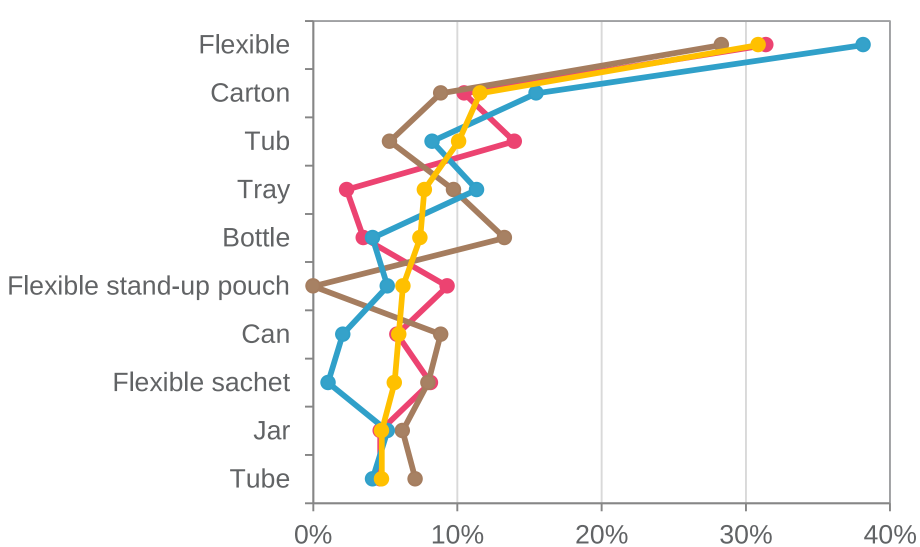
Number of Global Sweet Corn NPD for the L3M N=337

Sweet Corn Launches

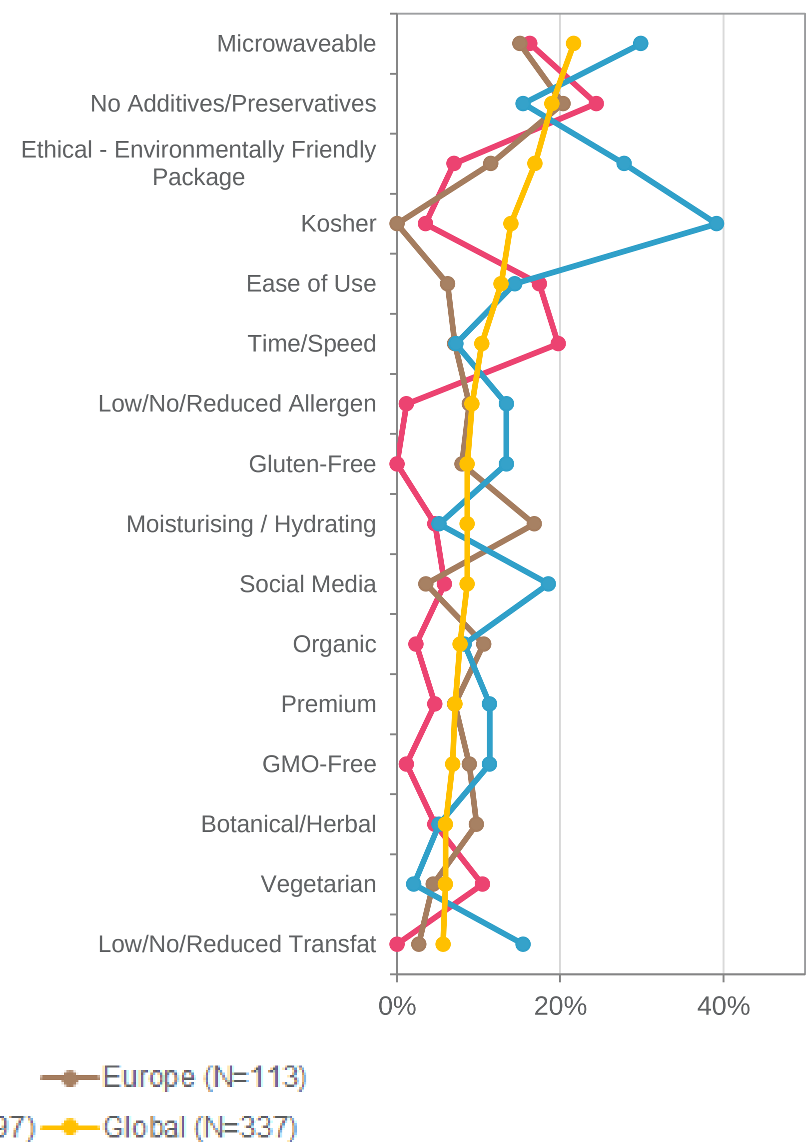
Top Claims & Pack Formats Used

- The key claims used were microwaveable, no additives and preservatives and environmentally friendly packaging. Kosher was the main claim made for products launched in North America.
- Flexible packaging was the primary packaging format used, this was consistent across regions.

Top Packs Used



Top Claims Used



Number of Global Sweet Corn NPD for the L3M
N=337
Only regions with n >30 are displayed

Innovative Sweet Corn Launches:
L3M (May – July 2014)

Apple & Sweet Potato Baked Whole Grain Corn Snack (Indonesia)

Gerber Graduates Lil' Crunchies Apple & Sweet Potato Baked Whole Grain Corn Snack is suitable for all babies from crawlers to toddlers age two and older. It has a melt-able texture, is easy to chew and swallow and also does not leave a mess. The kosher certified products is naturally flavoured and a good source of vitamin E as well as iron and zinc.

Claims:
Ease of Use, Babies & Toddlers (0-4), Social Media, Kosher, Wholegrain

Paul & Joe Summer 2014 Nail Treatment Oil (Japan)

Relaunched as part of the Paul & Joe Summer 2014 collection is Nail Treatment Oil, formerly known as Nail Care Oil, which is designed to prevent nail problems associated with dryness such as brittle nails and hangnails whilst leaving the cuticles feeling nourished and the fingertips hydrated.

Claims:
Botanical/Herbal, Seasonal, Aromatherapy, Time/Speed, Moisturising / Hydrating

Samba Style Sour Cream & Chilli Flavoured Corn Balls (Germany)

XOX Snack Party de Brazil Samba-Style Sauerrahm-Chilli (Samba Style Sour Cream & Chilli Flavoured Corn Balls) are a limited edition snack for the World Cup in Brazil. This product is made with the best German sunflower oil and contains no flavour enhancers.

Claims:
No Additives/Preservatives, Event Merchandising, Limited Edition

Keventer's Fresh Cheese and Corn Bite (India)

Keventer's Fresh Cheese and Corn Bite is 100% natural and free from artificial colours and preservatives. It cooks in three minutes and is quick frozen. This vegetarian product is ready to cook and retails in a 400g pack containing approximately 20 units.

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

Source: Mintel (2014)

Innovative Sweet Corn Launches:
L3M (May – July 2014)

McCain Original Bun's Mexican Recipe Buns (France)

McCain Original Bun's Recette Mexicaine (Mexican Recipe Buns) are made with tex-mex beef, kidney beans and sweetcorn. This limited edition product is said to be rich and golden, and can be microwaved or oven heated. They retail in a recyclable pack containing 4 x 100g individually wrapped units.

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

Beech-Nut Classics Sweet Corn Casserole Baby Food (USA)

Beech-Nut Classics Sweet Corn Casserole Baby Food has been repackaged with a new look pack. The kosher certified stage two product is made with natural ingredients and is suitable for babies from about six months old. It is microwaveable and retails in a 4-oz. pack.

Claims:
Babies & Toddlers (0-4), Kosher, No Additives/Preservatives, Microwaveable

Ready Pac Bistro Bowl Smokehouse BBQ Ranch Salad (USA)

Ready Pac Bistro Bowl Smokehouse BBQ Ranch Salad has been relaunched under a new brand name. Smoky and sweet, this product comprises crisp iceberg and romaine lettuces, BBQ ranch dressing, chicken breast in BBQ sauce, fire roasted corn, Monterey Jack cheese, tortilla strips, black beans and carrots.

Claims:
Ease of Use

Glico Pretz Sweet Corn Flavoured Biscuit Sticks (Malaysia)

Glico Pretz Sweet Corn Flavour Biscuit Sticks have been repackaged featuring a new design. This halal certified product retails in a 31g pack.

Claims:
Halal

Source: Mintel (2014)

Innovative Sweet Corn Launches:
L3M (May – July 2014)

Sumeru Wassup?! Vegetable Fingers (India)

Sumeru Wassup?! Vegetable Fingers have been relaunched and were previously known under "Sumeru Quick Snack". These crunchy and crispy vegetable fingers are made with spiced vegetable, jalapeños and chillies and contain no added colours or preservatives.

Claims:
No Additives/Preservatives, Social Media, Vegetarian

CP Chicken Corn Stick Nuggets (Thailand)

CP Chicken Corn Stick Nuggets have been repackaged in a new value pack. These semi-cooked nugget sticks are free from MSG and preservatives and can be prepared within five minutes. The halal certified product retails in a 450g pack.

Claims:
No Additives/Preservatives, Seasonal, Halal, Microwaveable, Ease of Use, Economy

Audun Oats & Corn Soup Mix (China)

Audun Yu Mi Yan Mai Jiang (Oats & Corn Soup Mix) is made with 100% natural grains and contains a variety of plant extracts. The soup is said to offer a balanced nutrition and is suitable for vegetarians and vegans. It is free from preservatives and artificial flavours.

Claims:
No Additives/Preservatives, Vegan, On-the-Go, Time/Speed, No Animal Ingredients, Vegetarian

Komplete Ultimate Vanilla Bliss Meal Replacement Shake (USA)

Komplete Ultimate Vanilla Bliss Meal Replacement Shake is a creamy blend of all-natural ingredients and real vanilla. It is said to be the world's first meal replacement shake that is ready to drink and free of dairy, gluten and soy. It comprises a blend of 21 superfoods with antioxidants to fuel the body with the nutrition it needs.

Claims:
All Natural Product, Low/No/Reduced Allergen, GMO-Free, Gluten-Free, Vegan, High Protein, On-the-Go, Ease of Use, Organic, No Animal Ingredients, Antioxidant

Source: Mintel (2014)

Australian Sweet Corn Launches:
L3M (May – July 2014)

Edgell No Added Salt Corn Kernels

Edgell No Added Salt Corn Kernels are available in a 420g pack that is now even easier to open, featuring a recipe suggestion. The product is a source of fibre, contains all natural ingredients and is naturally low in fat and sodium.

Claims:
No Additives/Preservatives, All Natural Product, Low/No/Reduced Fat, Microwaveable, Convenient Packaging, Low/No/Reduced Sodium

Edgell Mixed Vegetables

Edgell Mixed Vegetables are now available in an even easier to open 420g pack. The naturally low in fat product contains all natural ingredients and is a source of fibre.

Claims:
No Additives/Preservatives, All Natural Product, Low/No/Reduced Fat, Microwaveable, Convenient Packaging, Low/No/Reduced Sodium

Source: Mintel (2014)

In the Media.

General Vegetable News
(May – July 2014)

- The European Union has named 2014 the 'Year Against Food Waste'. Intermarche, a French supermarket developed a campaign for 'ugly' fruit and vegetables. They sold produce that was abnormal in shape and sold them for 30% cheaper compared to typical fresh produce sold in supermarkets.
- The campaign was so effective and popular that it increased foot traffic by 24% in-store and reached more than 13 million people in a month.

www.food.ninemsn.com.au

Commodity News
(May - July 2014)

- A company in the UK has made a bread loaf from almost entirely broccoli florets. The loaf has been described as ‘dense, soft and moist…somewhere in between an omelette and a brioche.’

(www.prevention.com/food/)

- Broccoli consumption has found to rid the body of air-pollution toxins, including benzene which is carcinogenic. The molecule found in broccoli is said to work rapidly and with long lasting effect.

(www.toledoblade.com)

- The Scoville Heat Unit (SHU) measures the sensation of chilli intensity. Jalapenos rate between 2,500-8,000 SHUs. The current record holder is the Carolina Reaper chilli which ranges over 1.5 million SHUs. Pure capsaicin (used in police pepper spray) can rank over 15 million SHU. When consumed capsaicin binds with receptors in the body which trigger the heat and pain sensation.

(www.gizmodo.com.au)

- A Japanese farmer is growing lettuce indoor with LED lighting. The schedule of night and day lighting provide an optimal growing environment, with the farmer producing 10,000 lettuce heads a day. The facility is only 25,000 square feet, but is tightly packed with 18 growing racks, each with 15 levels.

(www.escapistmagazine.com/news/)

- DuPont Pioneer in Canada are opening a research facility to investigate ultra-early maturity corn products, which in-effect would make corn a shorter season crop and be able to grow corn in cooler climates.

(www.lethbridgeherald.com/news/)

Thanks.