
**Monthly Tracker Report Wave 15: Celery, Cucumber, Eggplant & Zucchini**

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HAL Horticulture Australia

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# Contents



# Background & Methodology.

# Background & Setting the Scene.

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

Colmar Brunton has been commissioned to conduct a monthly 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 15, August 2014) focuses on:

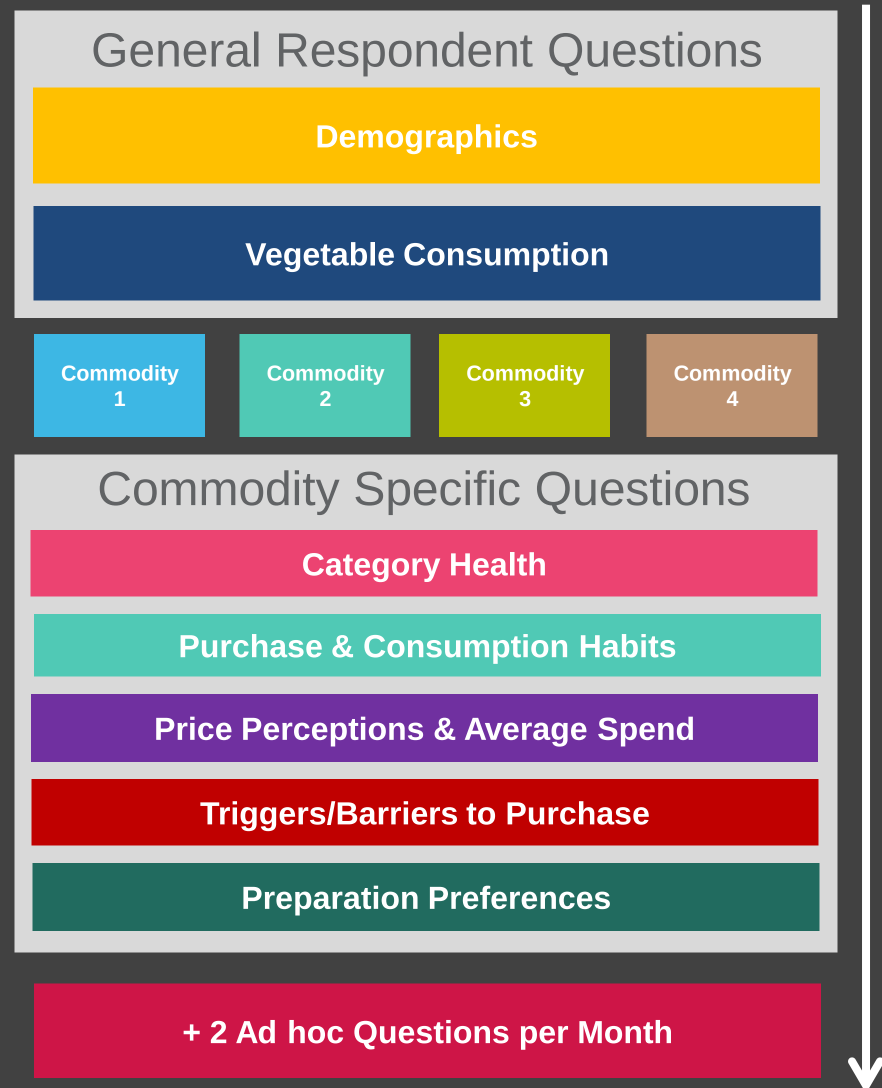
- Celery
- Cucumber
- Eggplant
- Zucchini

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

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

# Online Methodology.

- Respondents are recruited via an Online Panel. If the respondents meets the recruitment requirements of sufficient vegetable consumption (monthly) they are asked to complete the online questionnaire.
- All respondents complete general demographic and consumption questions. If respondents purchased any of the specific commodities within the last month they then complete those questions. A minimum of N=300 respondents per commodity completed the questionnaire.
- Topics covered in the questionnaire are vegetable purchase and consumption, category health, price and value perceptions, triggers and barriers to purchase and preparation and cooking preferences.
- An additional 2 ad-hoc questions are asked at the end of the questionnaire. The subjects of these questions are supplied by Horticulture 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.



# Sample.

In total, 661 respondents completed the questionnaire. Respondents represent most states and territories, as well as both metro and rural areas.

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

To qualify for the questionnaire, respondents...

⇛Are aged 18 years and over

⇛Purchase fresh vegetables at least once a month

⇛Purchase at least one of the monthly commodities (Celery, Cucumber, Eggplant & Zucchini) within the last month

⇛Are the main or joint grocery buyer

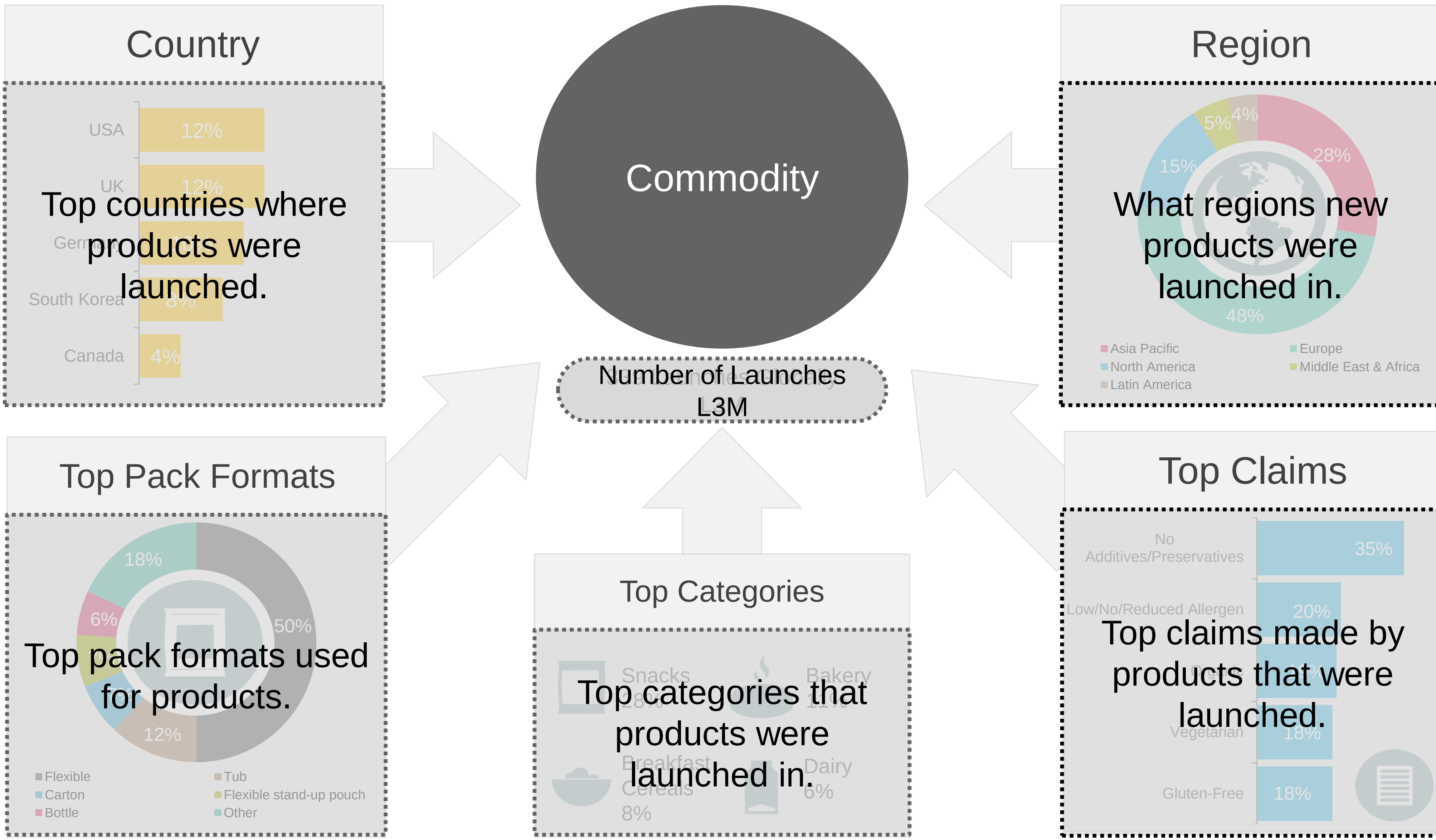
| | Total N=661 | Celery n=334 | Cucumber n=337 | Eggplant n=306 | Zucchini n=335 |
|---|---|---|---|---|---|
| **Gender** | | | | | |
| Male | 41% | 44% | 38% | 39% | 41% |
| Female | 59% | 56% | 62% | 61% | 59% |
| **Age** | | | | | |
| 18-24 y.o. | 6% | 5% | 7% | 8% | 5% |
| 25-34 y.o. | 16% | 15% | 18% | 22% | 11% |
| 35-44 y.o. | 16% | 13% | 18% | 18% | 15% |
| 45-54 y.o. | 18% | 19% | 14% | 18% | 20% |
| 55-64 y.o. | 21% | 22% | 19% | 21% | 21% |
| 65+ y.o. | 23% | 25% | 25% | 14% | 28% |
| **Household** | | | | | |
| Single Income no Kids | 16% | 14% | 16% | 18% | 15% |
| Double Income no kids | 17% | 16% | 15% | 21% | 19% |
| Young Families | 16% | 16% | 18% | 19% | 13% |
| Established Families | 23% | 21% | 23% | 25% | 24% |
| Empty Nesters | 27% | 33% | 28% | 18% | 29% |
| **Location** | | | | | |
| New South Wales | 20% | 18% | 19% | 22% | 19% |
| Victoria | 18% | 17% | 18% | 19% | 16% |
| South Australia | 17% | 18% | 17% | 17% | 16% |
| Queensland | 17% | 18% | 18% | 18% | 17% |
| Western Australia | 18% | 18% | 16% | 18% | 18% |
| Tasmania | 6% | 7% | 6% | 2% | 9% |
| Australian Capital Territory | 4% | 4% | 6% | 4% | 4% |

# Trends Research: Our Approach

- Colmar Brunton has used a combination of both desk research and in the field of market research to explore the trends of each vegetable commodity being tracked this month.
- Our main source of secondary data for this report was collected from Mintel Global New Products Database (GNPD).
- This data source is used to analyse products launched around the globe in the last 3 months (L3M) that contained each vegetable being tracked as a core ingredient.
- Trends are determined at a global and regional level.
- Claims and pack types used for the launched products are explored and the relevant product categories are determined. Specific examples of products being launched around the globe that are particularly innovative are displayed for reference.
- Trend reports are provided monthly and will reflect the 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 15:
# Executive Summary

# Celery Grower Action Plan

Increasing consumer perceptions of value for money

1.

**Insight:**

Increasing consumption of celery as snacks and antipasto dishes.

**Recommendation:**

Keep celery top of mind for consumers when shopping for snacks with signs in the fresh snack aisles 'Don't forget your celery' as a healthy alternative. Further, investigate partnering with dip manufacturing companies.

2.

**Insight:**

Across the previous three waves, perceptions of freshness longevity have increased.

**Recommendation:**

Clearly communicate length of freshness and shelf life to consumers, particularly best before dates and harvest dates, which in-turn will strengthen value for money perceptions.

3.

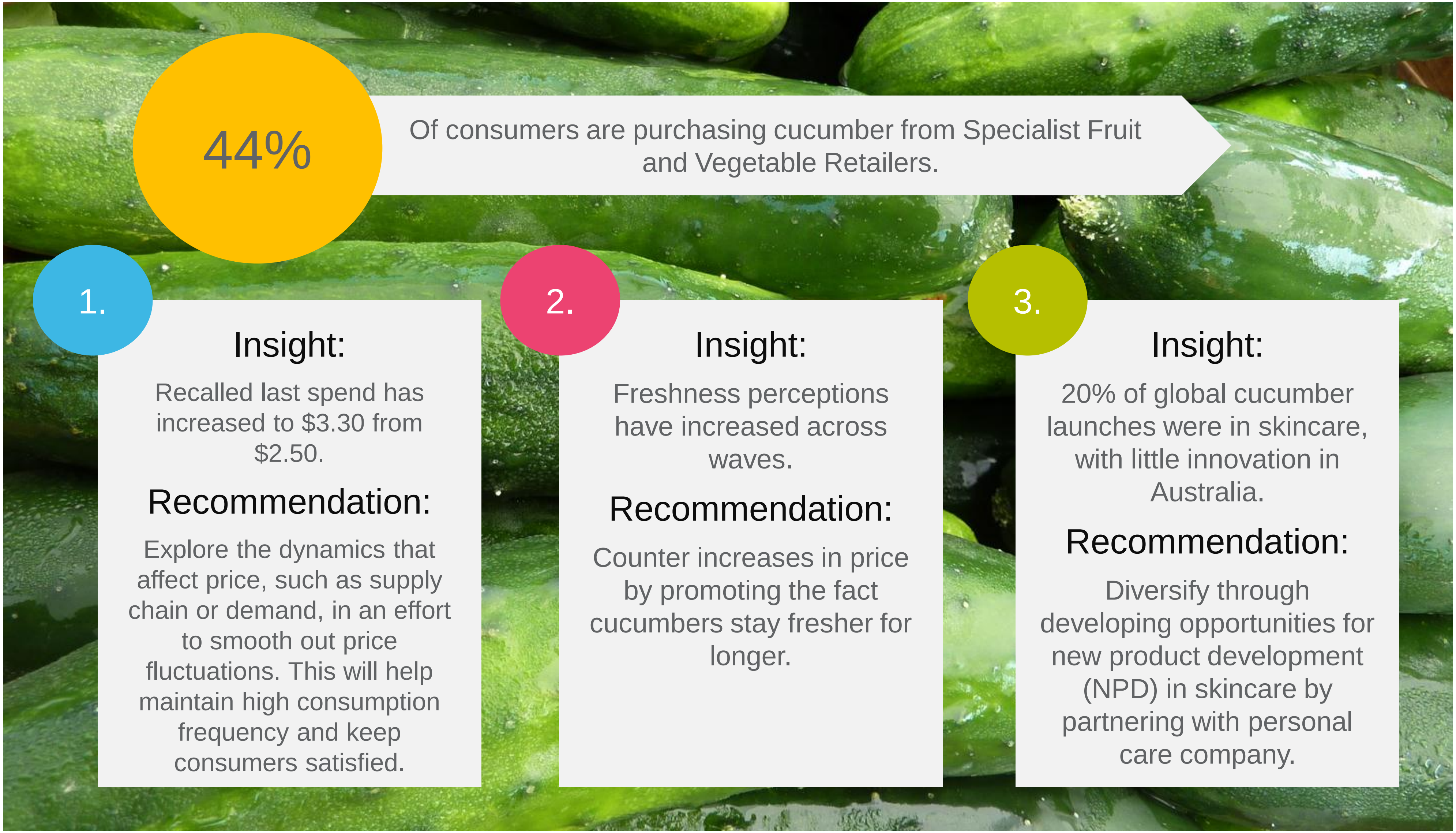
**Insight:**

There has been an increase in celery stalk purchase and simultaneous decrease in purchase of half celery formats.

**Recommendation:**

Consider the future relevance of half celery formats and determine viability of alternative formats, including mini varietals and pre-packaged celery stalks.

# Cucumber Grower Action Plan



**44%** Of consumers are purchasing cucumber from Specialist Fruit and Vegetable Retailers.

## 1.

### Insight:

Recalled last spend has increased to $3.30 from $2.50.

### Recommendation:

Explore the dynamics that affect price, such as supply chain or demand, in an effort to smooth out price fluctuations. This will help maintain high consumption frequency and keep consumers satisfied.

## 2.

### Insight:

Freshness perceptions have increased across waves.

### Recommendation:

Counter increases in price by promoting the fact cucumbers stay fresher for longer.

## 3.

### Insight:

20% of global cucumber launches were in skincare, with little innovation in Australia.

### Recommendation:

Diversify through developing opportunities for new product development (NPD) in skincare by partnering with personal care company.

# Eggplant Grower Action Plan

**20%** Of consumers indicated that they will purchase more Eggplant than they currently do in the future.

## 1.

### Insight:

Consumers are experimenting with eggplant in new recipes. Especially younger couples and families.

### Recommendation:

Promote experimentation of eggplant by providing consumers with information on cooking styles and recipes including flavour descriptors and suitable varietals.

## 2.

### Insight:

A large number of consumers purchase Eggplant at specialist retailers.

### Recommendation:

Explore distribution mix and consider specialist retailers as a substantial channel for sales. Also a possible avenue for future research to understand why and what consumers are seeking in this channel ie. Quality, availability.

## 3.

### Insight:

Consumers perceive Eggplant as low importance and key trigger to purchase is its use as an ingredient.

### Recommendation:

Promote versatility and replacement potential, such as healthy alternatives to lasagne sheets, hot chips and savoury spreads.

# Zucchini Grower Action Plan

## 9%

Of consumers intending to purchase Zucchini in the future, which is low compared to the Harvest mean (14%).

### 1.

**Insight:**

Recalled last spend increased to $3.20 from $2.80.

**Recommendation:**

Explore the dynamics that affect price, such as supply chain or demand, in an effort to smooth out price fluctuations.

### 2.

**Insight:**

Zucchini predominantly a dinner occasion vegetable.

**Recommendation:**

Educate consumers on recipes that bring Zucchini out of the dinner occasion and into the lunch occasion.

### 3.

**Insight:**

40% already consume enough zucchini for their needs.

**Recommendation:**

Promote the fact zucchini can be a replacement for other vegetables, but also things such as pasta, spaghetti, or even included in cakes and sweets.

# Fast Facts
(1 of 2)

## Eggplant:

- Eggplant had strong consumer endorsement and increased future propensity to purchase was high. However, endorsement and importance were below the Harvest mean.
- On average, consumers purchased eggplant 3.1 times per month and consumed 4.4 per month. Purchase was made primarily through mainstream and specialist retailers.
- Consumers purchase 900g of eggplant per shop, with a recalled last spend of $4.39. Consumers prefer to purchase eggplants individually.
- Pricing analysis revealed the national average price for purple eggplant was $8.98 per kilo in August.
- Unprompted awareness was low, with two thirds of consumers unable to recall a type.
- Key triggers to purchase were to use as an ingredient in dishes and add variety to their vegetable selection. The main barriers to future purchase were already consuming enough and the price to purchase.
- Consumers expected eggplant to remain fresh for 7.8 days once purchased. This longevity of freshness was generally met.

## Celery:

- Celery fell comparatively low on perceived importance, endorsement and interest in new types, however was higher than the Harvest mean for satisfaction.
- Celery was purchased on average 2.9 times per month and consumed 9.4 times per month, which represents an increase from the previous wave.
- Consumers preferred to purchase whole celery bunches. Recalled last spend was $2.80, a slight increase from the last wave. Perceived value for money increase substantially in wave 15 to 6.6/10 from 6.2/10.
- Price tracking showed a slight increase, with average national price in April $2.67 each.
- Spontaneous awareness of celery types remained very low, with 85% of respondents unable to state a type.
- Consumers expected celery to remain fresh for over 9.7 days, which was an increase from previous waves.
- Top triggers to purchase were using celery as an accompanying vegetable to dishes, and for health benefits. Key barrier to purchase was that consumers already consume enough for their needs.

# Fast Facts
(2 of 2)

## Cucumber:

- In Wave 15, cucumber had relatively strong category health measures, in line with the Harvest mean. Future purchase intent however was slightly low.
- Cucumber was purchased 4.3 times per month and consumed on average 12.2 times per month. Main retail channels for purchase was Coles and Woolworths.
- Average weight of purchase was 760g, which represented a slight increase from previous waves. Recalled last spend was $3.30, which also represented an increase from previous waves. Overall perceived value for money was good (6.2/10) and consistent from previous waves..
- Pricing tracking of Lebanese cucumber revealed a national average of $8.58 per kg, which was considerably higher than the previous wave ($4.96 per kg).
- Unprompted awareness of  types and varieties was high, with Lebanese and Continental cucumbers being the most recalled. A quarter of consumers were unable to recall a type of cucumber.
- Cucumber was expected to stay fresh for just over a week and expectations were increasingly met from the previous wave.
- Top drivers of purchase were taste and health benefits, consistent across waves.

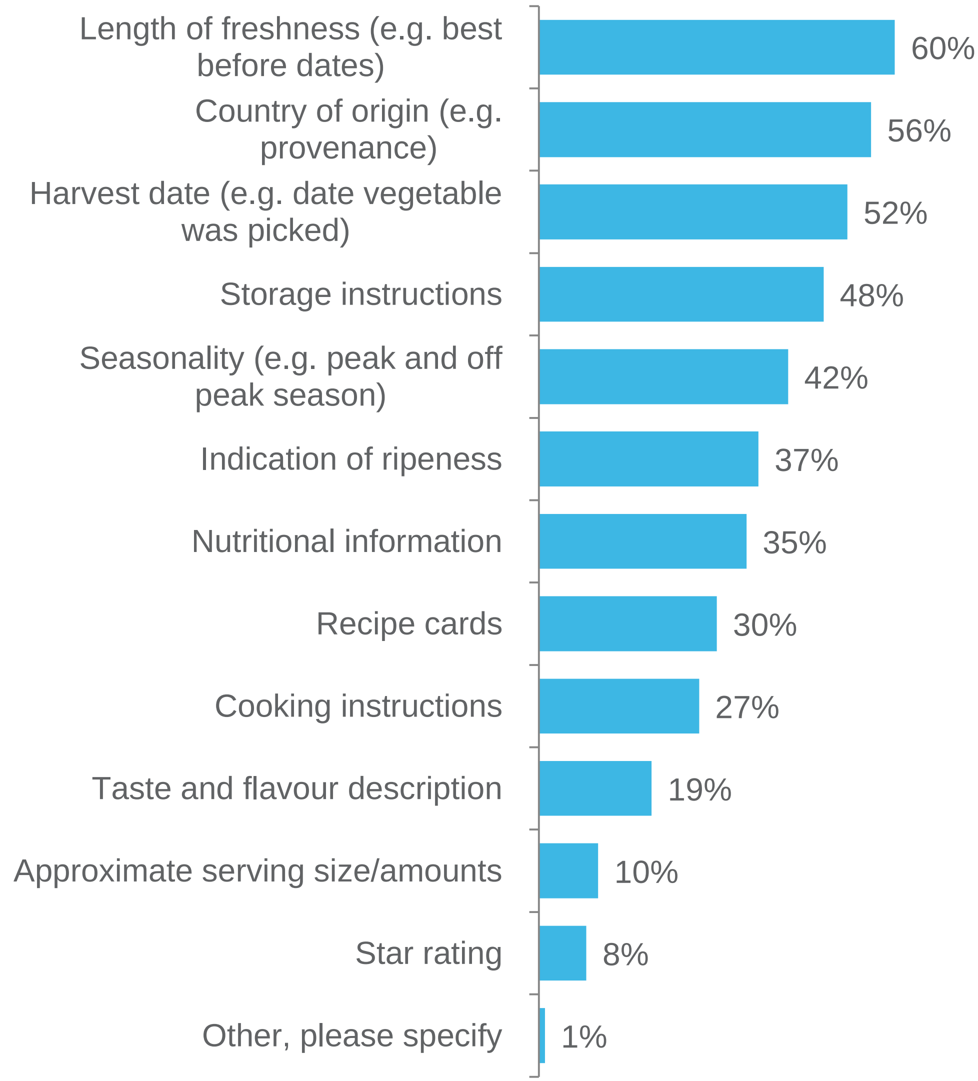
## Zucchini:

- Zucchini fell below the Harvest mean on perceived importance and future purchase intent.
- On average zucchini was purchased 3.4 times per month and consumed 7.1 times per month, which represents an increase from previous waves.
- On average, consumers purchased 700g of zucchini. Recalled last spend was $3.20, higher than previous waves. Overall zucchini was perceived to be good value for money (6.2/10).
- Price tracking indicated a national average of $5.77, which was a marginal increase from the previous wave.
- Awareness of zucchini types remained low, with 71% of consumers unable to state a zucchini type. Consumers recalled types primarily through colour. This has been consistent across waves.
- Zucchini was expected to stay fresh for 8.1 days. Expectations of freshness were increasingly met from the previous wave.
- Top triggers to purchase were as an ingredient in a meal and convenience factors of both preparation and cooking. Again, consistent across waves.

# Wave 15:
# Ad-Hoc Questions

# In-store Information

- A half of all consumers indicate they want information on best before dates and harvest dates in-store. Longevity of freshness is crucial information for consumers at point of purchase and will help manage value for money expectations.
- Consumer's also want information on vegetable country of origin. From previous Harvest findings, the most important provenance information is grown in Australia.
- Only 4% of consumers indicate that this information would not be helpful to them.




AHQ1. When shopping for fresh vegetables, what information would you find most helpful?
N=661

> "The vegetables available at the moment are very good. Freshness is sometimes the biggest problem."

# Products consumers want in-store

> "I believe we need more information on Australian seasonal produce, why to buy in season and recipes to match."

- Consumers are generally happy with what is available in-store. They do want fresh vegetables that are in season and locally grown.


> "Different and unusual varieties of vegetables are exciting to me because I love to cook and try new things, as do my children."

AQH2. What vegetable products would you like to see available where you regularly shop?
N=661

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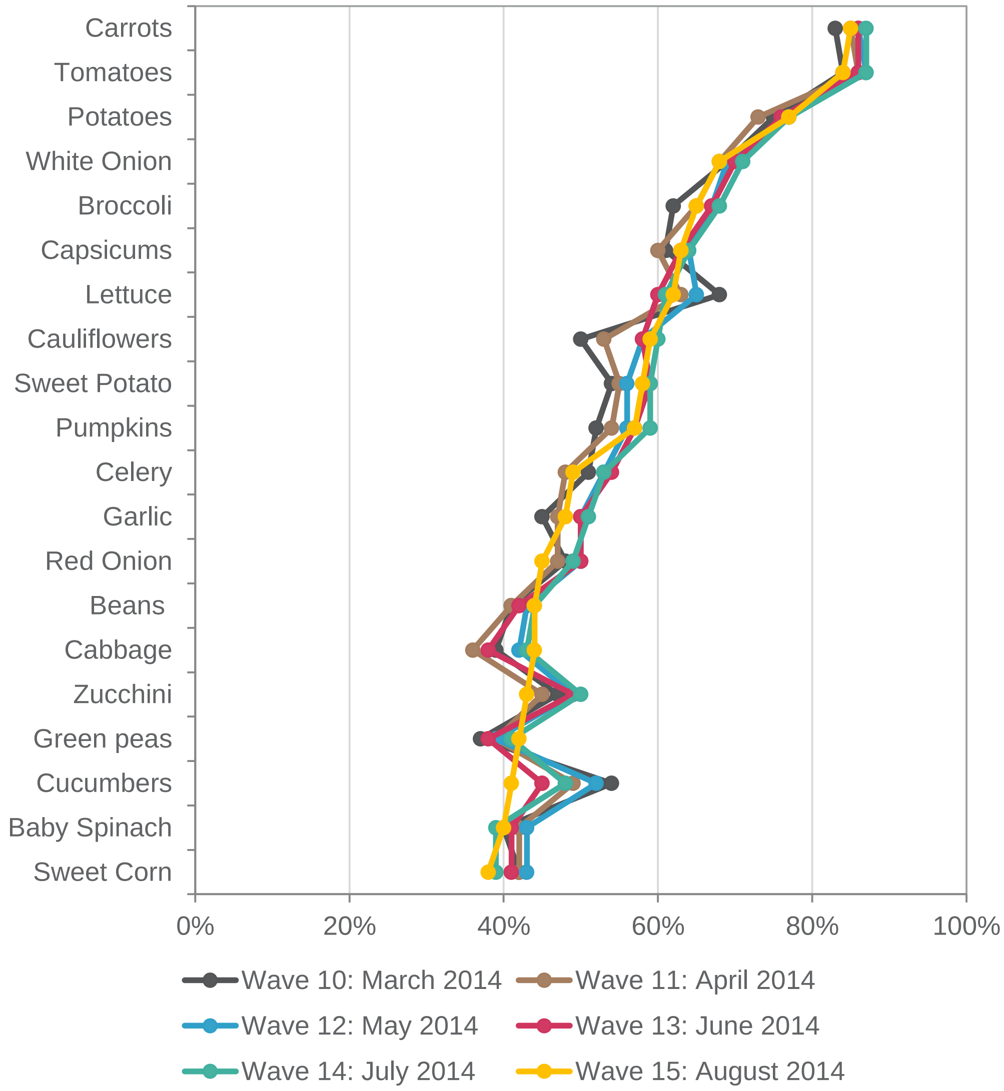
# Wave 15: Overall Vegetable Tracking

# Vegetables
# Purchased Last Month

- Vegetable purchase is consistent with previous months.
- Carrots, tomatoes and potatoes are the most purchased vegetables in August.
- The greatest variation in purchase across the last six months is cauliflower and cucumbers. Cauliflower purchase has increased, whilst cucumber purchase has decreased. The fluctuation in purchase may be due to limited availability or being perceived as seasonal vegetables by consumers.




Sample Wave 15, N=2169
S8. Which of the following fresh vegetables have you purchased in the last month?

# Category Health Explained

The following questions are 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



- All commodities in Wave 15 fell slightly below the Harvest mean for perceived importance, with cucumber achieving the highest score.
- Eggplant was the only commodity to fall below the Harvest mean on Satisfaction, while celery the only to fall below the mean for Endorsement. Celery and Zucchini were lowest on interest in new types.
- Eggplant has strong endorsement and achieved a substantially higher Future Purchase intent (20%) compared with other commodities and the Harvest mean, suggesting eggplant will increase in sales over and above other commodities.

| | Eggplant | Celery | Cucumber | Zucchini | Harvest Total Mean |
|---|---|---|---|---|---|
| Importance | 5.7 | 5.7 | 6.2 | 5.8 | 6.3 |
| Satisfaction | 6.2 | 6.8 | 6.7 | 6.6 | 6.6 |
| Endorsement | 7.0 | 6.3 | 6.7 | 6.7 | 6.7 |
| Interest (New Types) | 6.3 | 5.6 | 6.2 | 5.9 | 6.1 |
| Future Purchase | | | | | |
| More | 20% | 9% | 11% | 9% | 14% |
| Same | 77% | 88% | 88% | 89% | 85% |
| Less | 3% | 3% | 1% | 2% | 2% |

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

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# Celery.

# Purchase and Consumption Behaviour

Average Purchase **2.9** times per month

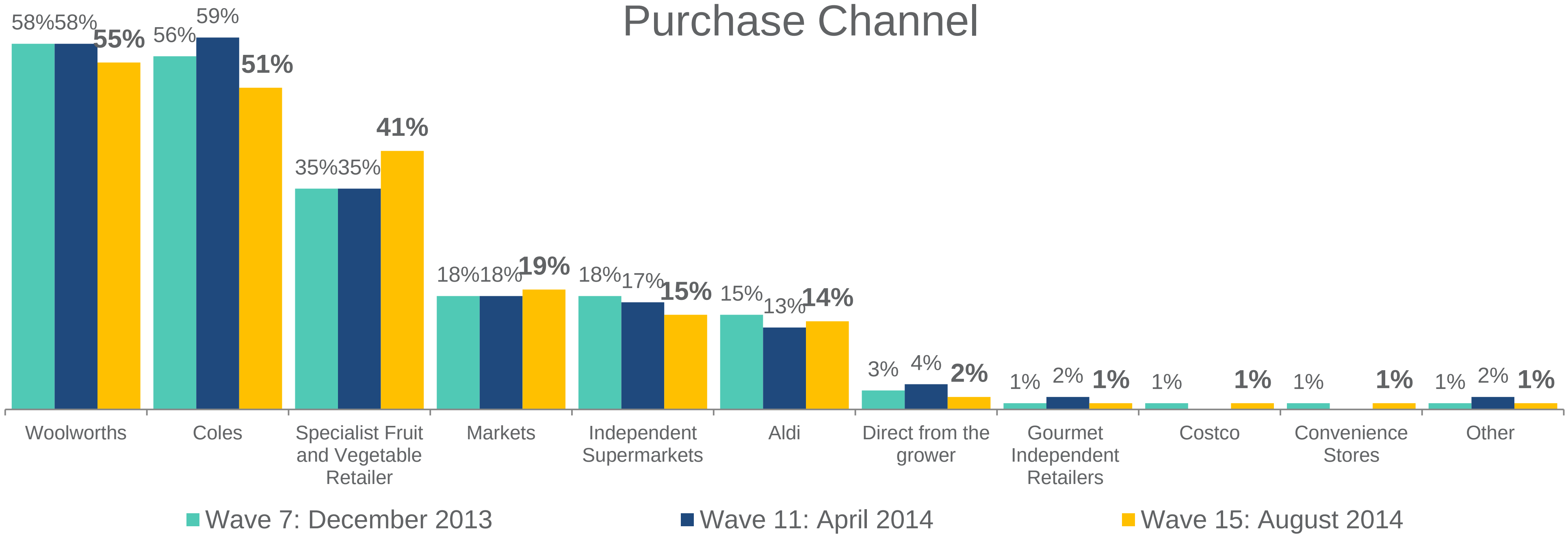
▲ 3.1 times, Wave 7
▼ 2.5 times, Wave 11

Average Consumption **9.4** times per month

▼ 9.3 times, Wave 7
▼ 7.7 times, Wave 11

- Consumers purchase celery three times per month. Celery is consumed on average 9.4 times per month, consistent with December last year.
- Purchase in mainstream retailers, Coles and Woolworths, is down on previous months. There is an increase in purchase from specialist retailers.

## 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 7, N=339, Wave 11 N=304 and Wave 15 N=334

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

# Average Spend and Price Sensitivity



## Average weight of purchase

The average consumer typically purchased **900g** of Celery in April 2014, this was consistent with previous months.

- 800g, Wave 7
- 800g, Wave 11

## Recalled last spend

The average recalled last spend on Celery was **$2.80.** This was in line with past waves.

- $2.80, Wave 7
- $2.50, Wave 11

## Value for money

On average, consumers perceived Celery to be good value for money **(6.6/10)**, which has increased from previous waves.

- 6.1/10, Wave 7
- 6.2/10, Wave 11

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 7, N=339, Wave 11 N=304 and Wave 15 N=334



▼: Indicates LOWER score than current wave.
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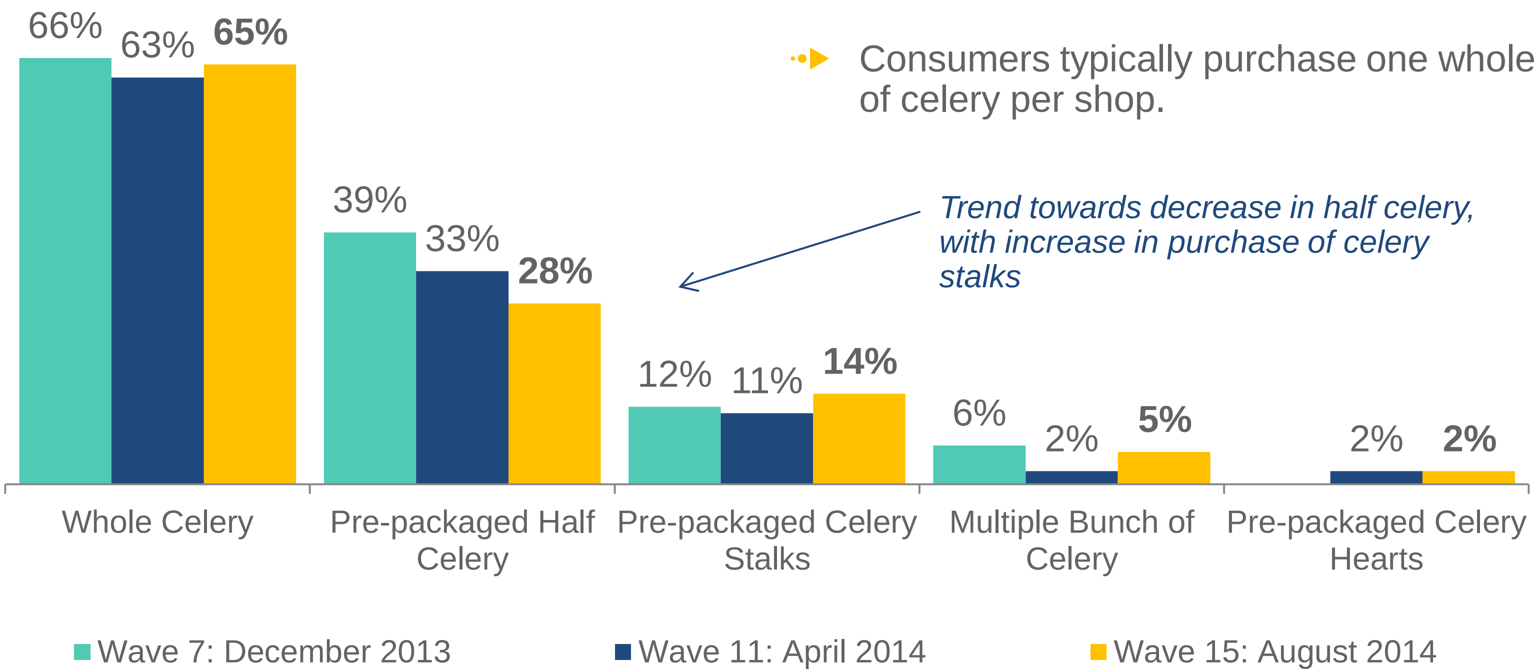
# Pack Formats Purchased




- Whole celery remains the most common format purchased.
- Consumers typically purchase one whole bunch of celery per shop.

*Trend towards decrease in half celery, with increase in purchase of celery stalks*

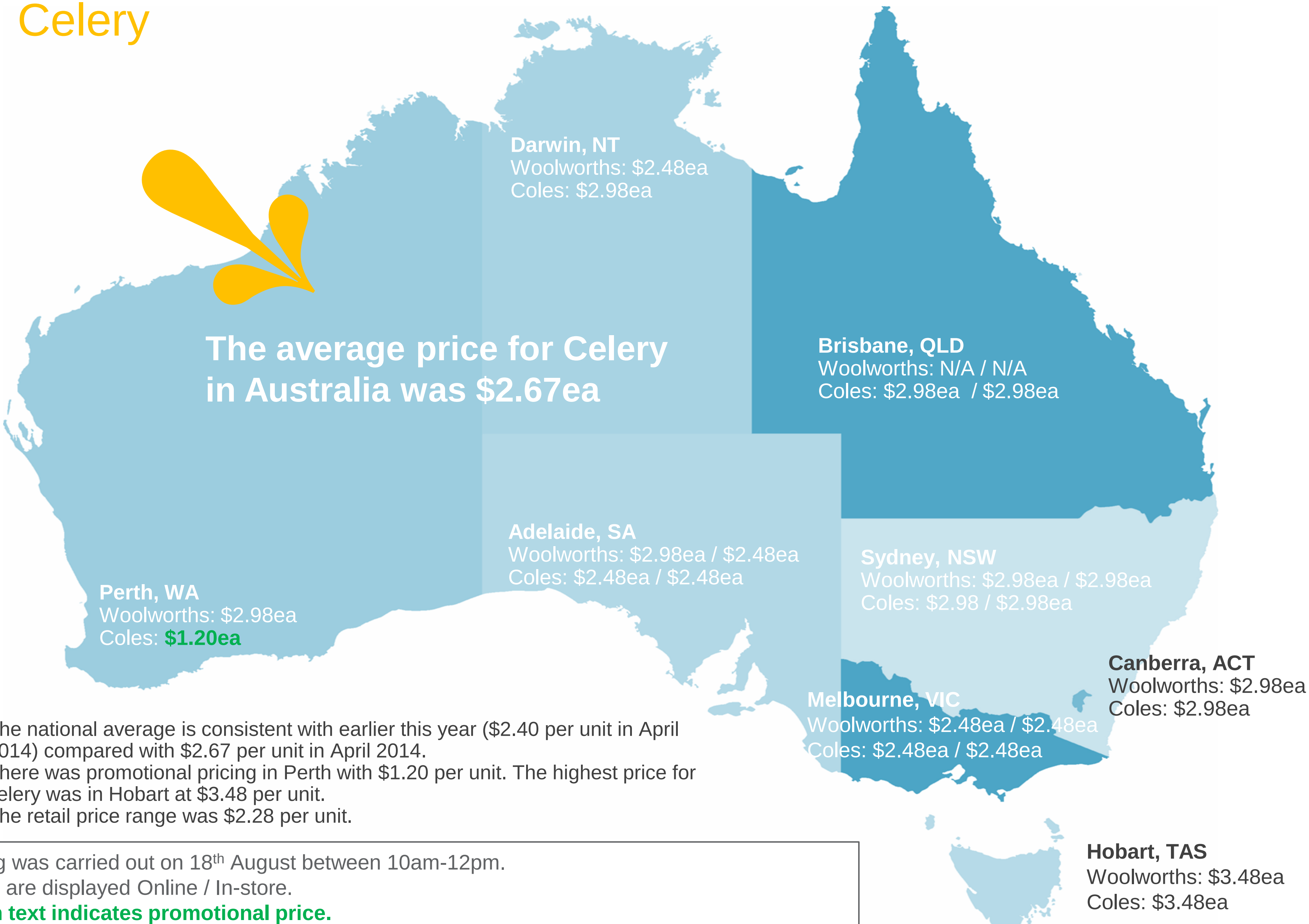
| | Whole Bunch | Half Bunch | Pre-packed Stalks | Multi-bunch | Celery Hearts |
|---|---|---|---|---|---|
| Wave 7 | 1.2 | 1.1 | 1.7 | 1.3 | - |
| Wave 11 | 1.1 | 1.1 | 1.5 | 1.9 | 1.5 |
| Wave 15 | 1.3 | 1.3 | 2.6 | 1.9 | 2.6 |

Q3a. How much <commodity> does this typically equate to?
Sample Wave 7, N=339, Wave 11 N=304 and Wave 15 N=334

# Online and In-store Commodity Prices



## Celery




- The national average is consistent with earlier this year ($2.40 per unit in April 2014) compared with $2.67 per unit in April 2014.
- There was promotional pricing in Perth with $1.20 per unit. The highest price for celery was in Hobart at $3.48 per unit.
- The retail price range was $2.28 per unit.

Pricing was carried out on 18th August between 10am-12pm.
Prices are displayed Online / In-store.
**Green text indicates promotional price.**

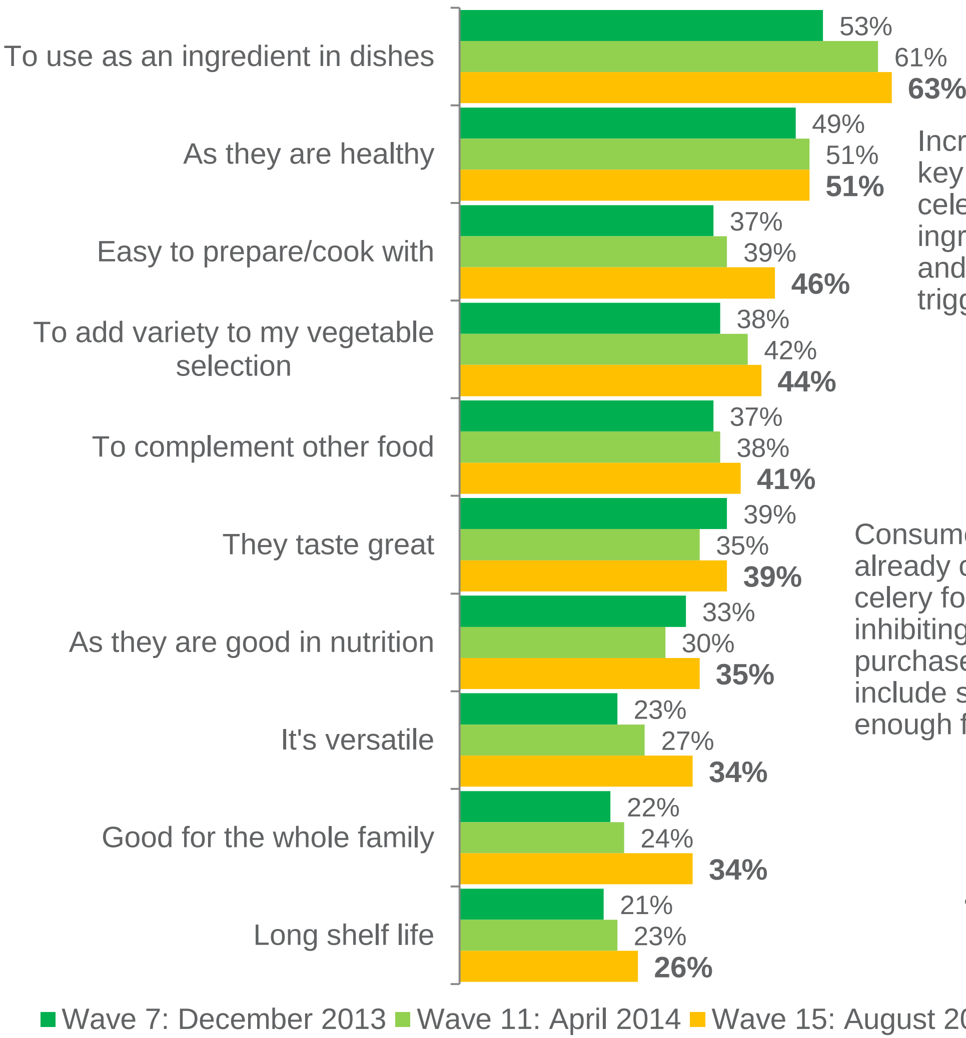
# Spontaneous Awareness

- Awareness of celery varieties remained low, with over 85% of consumers unable to recall a type. This low level of recall was similar to previous waves.
- Respondents who stated a type of celery recalled the ‘normal’ one and ‘stringless’ types.

Sample Wave 7, N=339, Wave 11 N=304 and Wave 15 N=334
Q6a. What varieties of <commodity>  are you aware of? (unprompted)

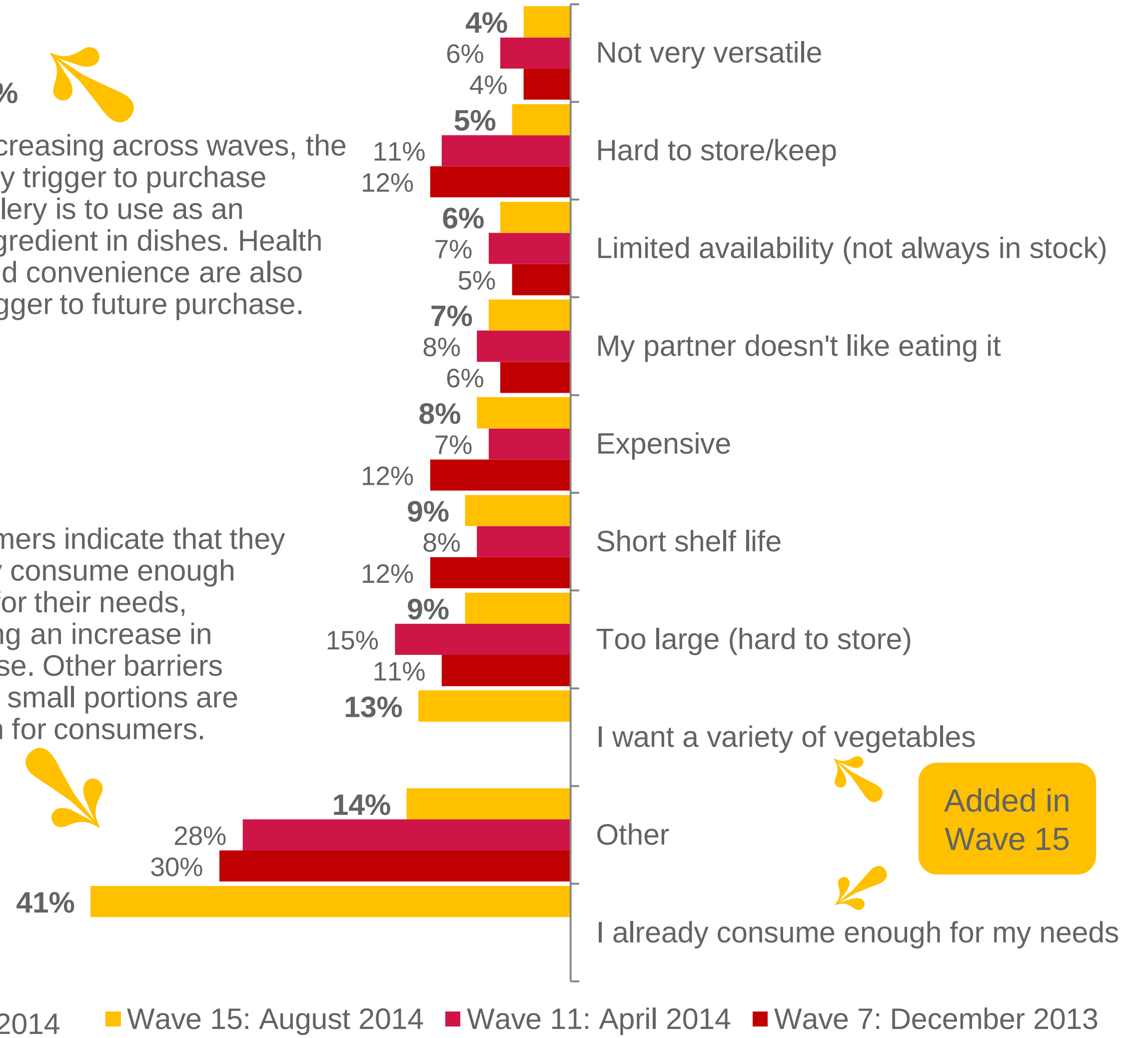
# Triggers & Barriers to Purchase

## Triggers




Increasing across waves, the key trigger to purchase celery is to use as an ingredient in dishes. Health and convenience are also trigger to future purchase.

## Barriers




Consumers indicate that they already consume enough celery for their needs, inhibiting an increase in purchase. Other barriers include small portions are enough for consumers.

Sample Wave 7, N=339, Wave 11 N=304 and Wave 15 N=334

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?

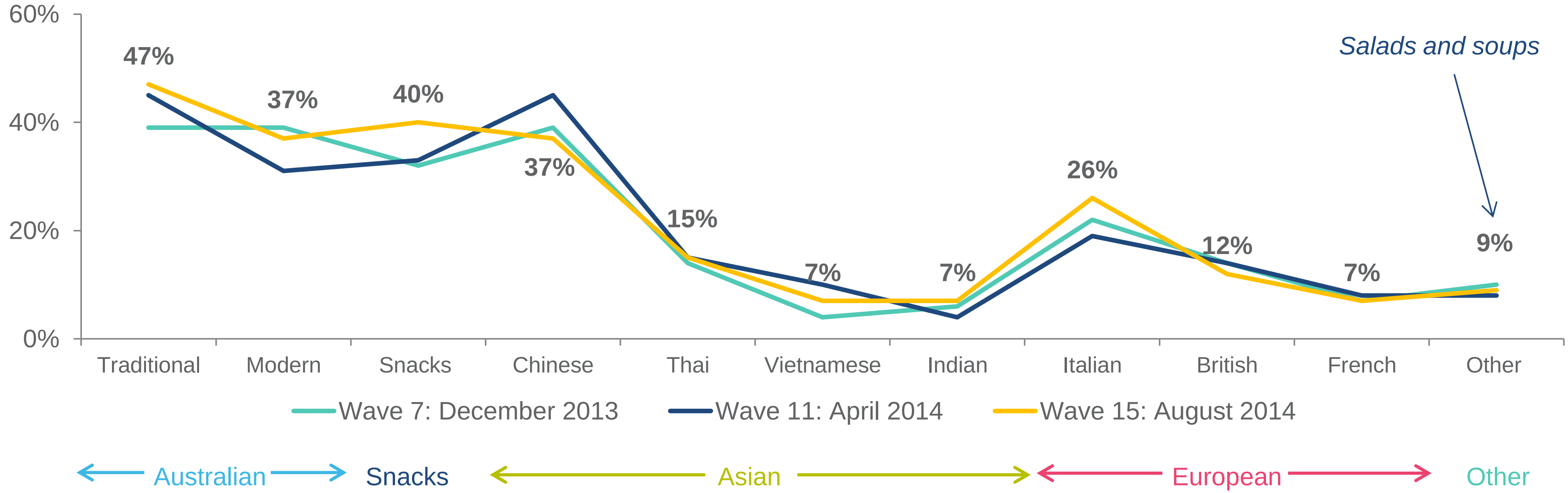
# Cooking Cuisine & Occasions

- Australian cuisine remains the most popular choice for cooking celery. Snacks and Chinese cuisine are also frequently cooked.
- Weekday dinner and family meals are the main celery consumption occasions.

## Wave 15 Top 5 Consumption Occasions

| | Wave 15 | Wave 11 | Wave 7 |
|---|---|---|---|
| **Weekday Dinner** | **42%** | ▼ | — |
| **Family meals** | **39%** | ▼ | ▼ |
| **Every-day meals** | **34%** | ▼ | ▼ |
| **Quick Meals** | **33%** | ▼ | ▼ |
| **Weekend Dinner** | **29%** | ▼ | ▲ |

## Typical Cuisine Cooked




Sample Wave 7, N=339, Wave 11 N=304 and Wave 15 N=334
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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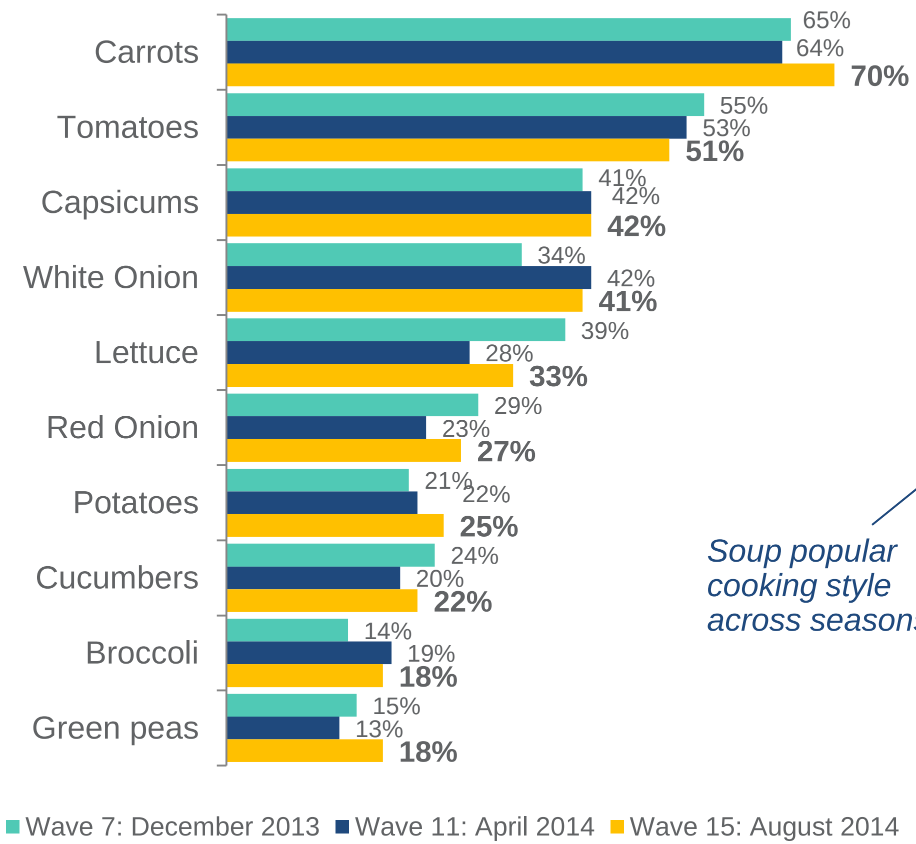
▲: Indicates HIGHER score than current wave.

# Cooking Preferences

## Top 10 Accompanying Vegetables




*Soup popular cooking style across seasons*

- Celery in generally served with carrots, tomatoes and capsicums. This is on trend with previous waves.
- Over a half of consumers eat celery raw. Key styles of cooking are in soups and stir fries.

**Top Cooking Styles**

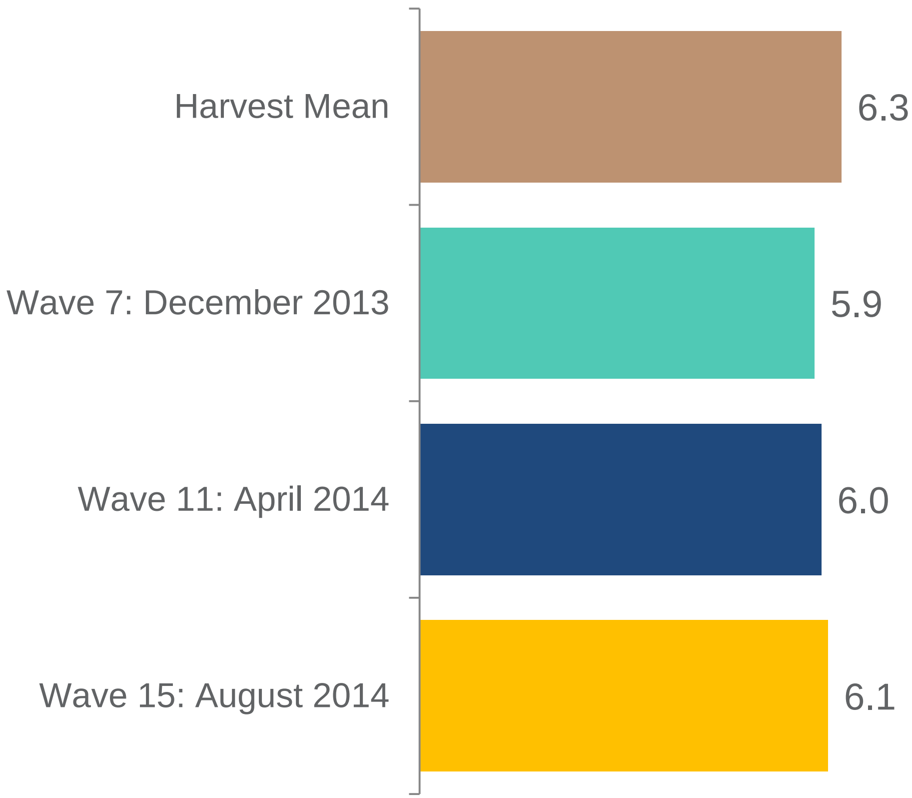
| | Wave 7 | Wave 11 | Wave 15 |
|---|---|---|---|
| Raw | 68% | 58% | 60% |
| Soup | 39% | 46% | 56% |
| Stir frying | 40% | 52% | 52% |
| Stewing | 28% | 26% | 37% |
| Sautéing | 11% | 10% | 14% |
| Steaming | 7% | 12% | 10% |
| Mince | 4% | 5% | 7% |
| Shallow Frying | 7% | 4% | 6% |
| Boiling | 6% | 9% | 6% |
| Other | 7% | 8% | 6% |

Sample Wave 7, N=339, Wave 11 N=304 and Wave 15 N=334
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



⇛ There is a trend across the three waves of increasing importance of provenance, which is in line with the overall Harvest mean.

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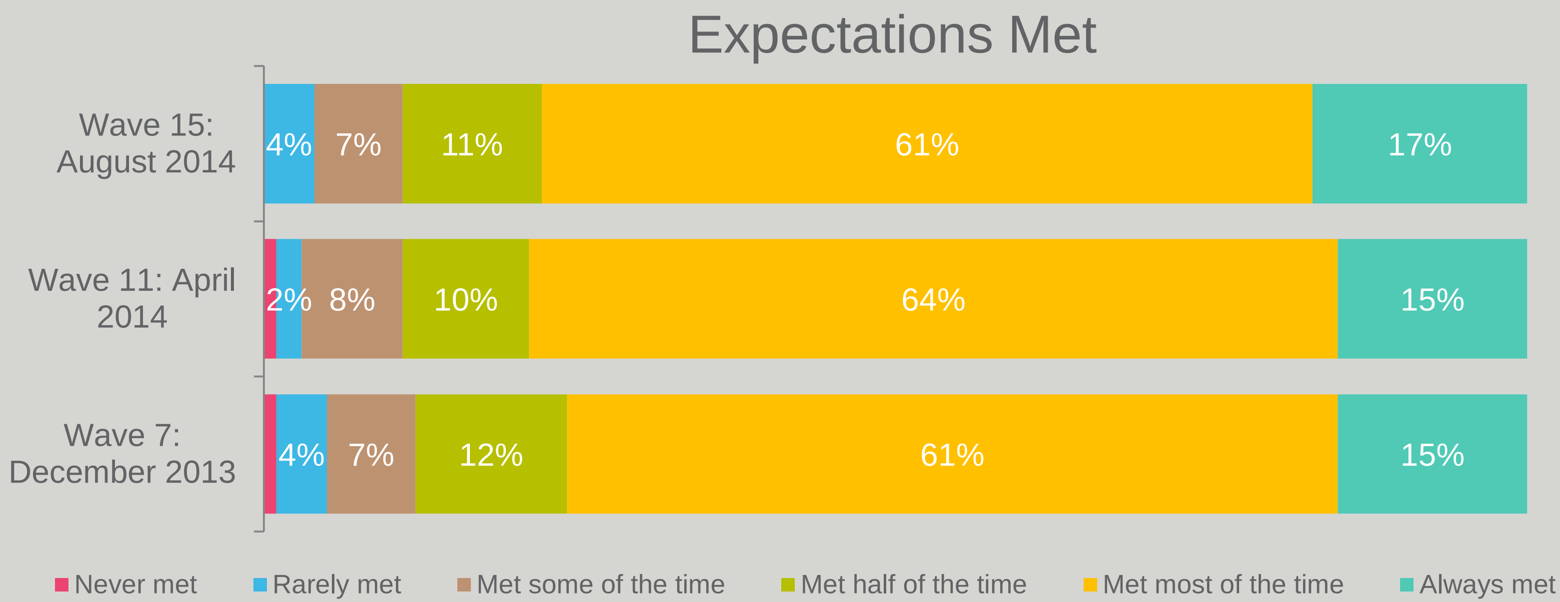
Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 7, N=339, Wave 11 N=304 and Wave 15 N=334

# Freshness and Longevity

Expected to stay fresh for **9.7** days

▼ 9.3 days, Wave 7
▼ 9.5 days, Wave 11

- Consumers expect celery to remain fresh for nearly 10 days once purchased. This has slightly increased across the three waves.
- Expectations of freshness are generally met most of the time, which is consistent with previous waves.




Sample Wave 7, N=339, Wave 11 N=304 and Wave 15 N=334
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> ?

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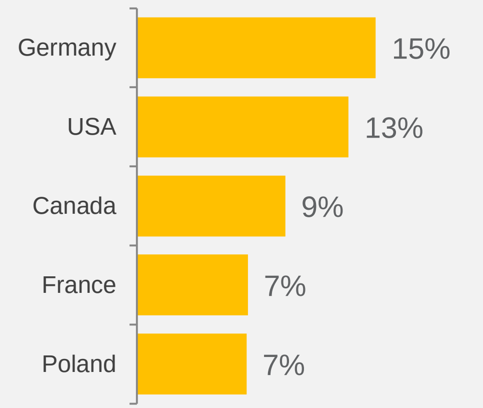
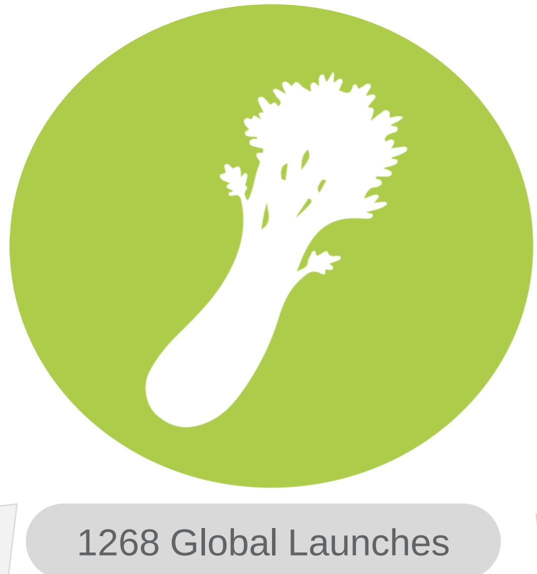
# Trends: Celery

# Celery Global NPDs
## June – August 2014

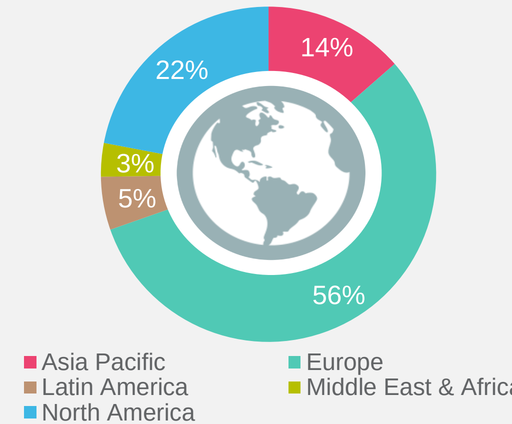
There were 1268 products containing celery launches in the past three months. Launches primarily occurred in Europe, in particular Germany. Categories for launch were meals, sauces and processed products.

### Country

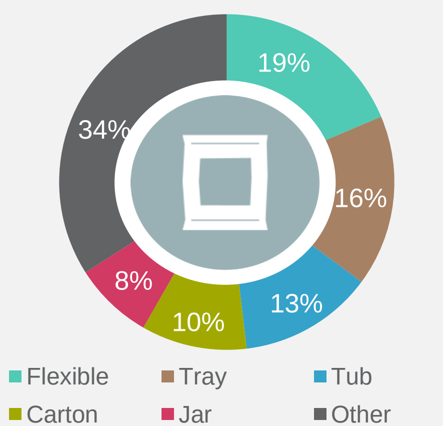



### Region




### Top Pack Formats




### Categories

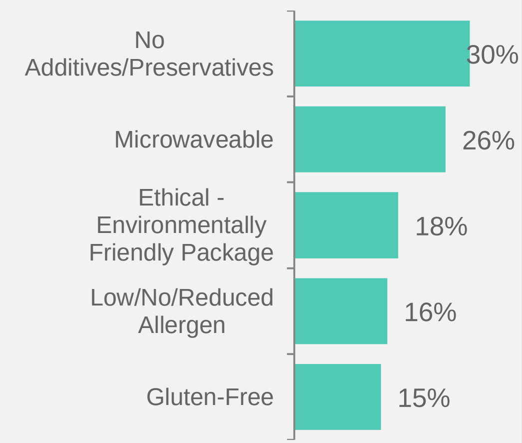
Meals 24%

Sauces 19%

Processed Products 18%

Soup 12%

### Top Claims



# Celery Product Launches:
## Last 3 Months (June – August 2014)

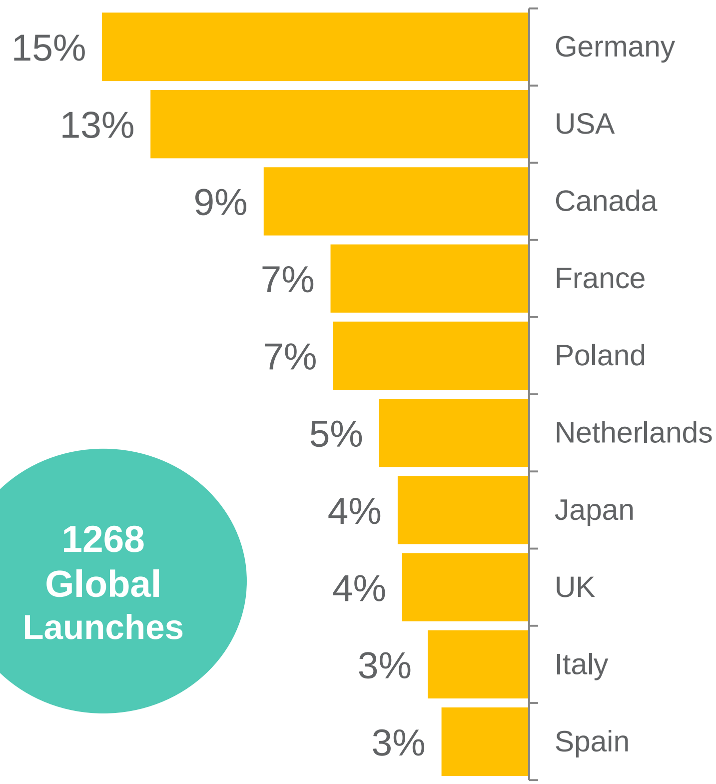
- Consistent with previous trends, a large number of products (N=1268) containing celery as an ingredient were launched globally in the last three months.
- There were 12 products launched in Australia, which was slightly more than the previous wave. Products ranged from stock to ready to eat meals.
- The majority of launches occurred in Europe (56%). The key country for launch was Germany (15%), consistent with previous trends.
- Flexible packaging (19%) and trays (16%) remain the most common pack format used over the last three months.
- Meals (24%), sauces and seasoning (19%) and processed products are the main categories for launches.
- Core claims used were no additives (30%) and microwavable (26%).
- Examples of the most innovative launches can be found on the following pages.

Source: Mintel (2014)

# Celery Launches

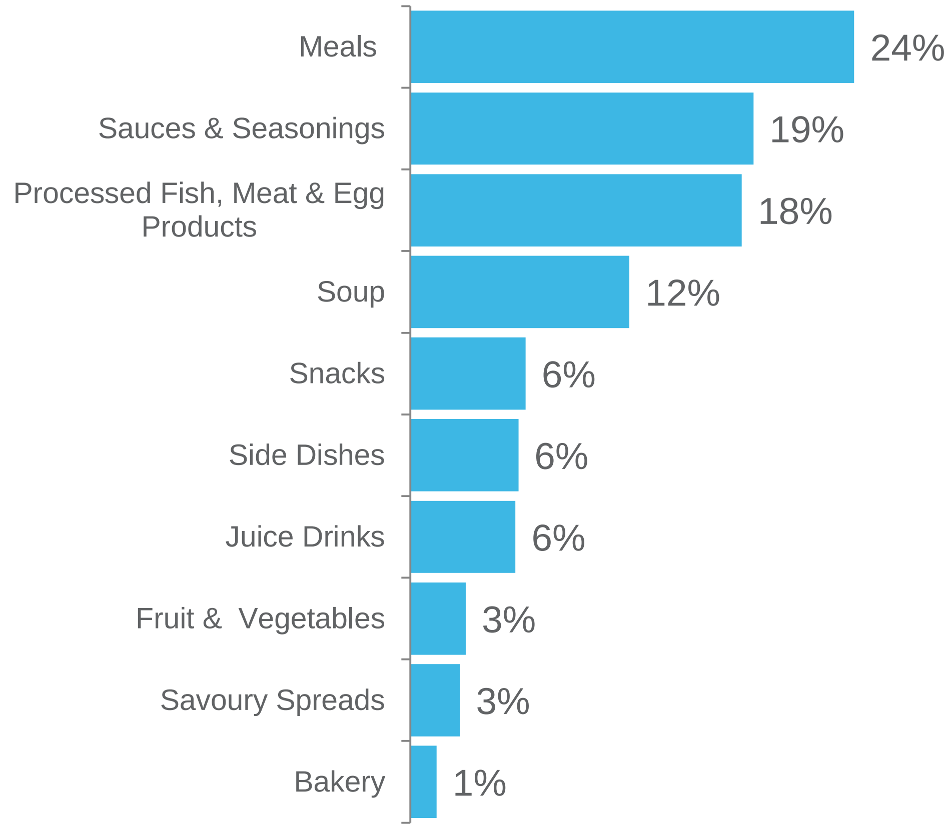
- Germany and USA remained the main countries for celery launches in the last three months.
- Meals were the main category for celery product launches.

## Top Launch Countries




**1268 Global Launches**

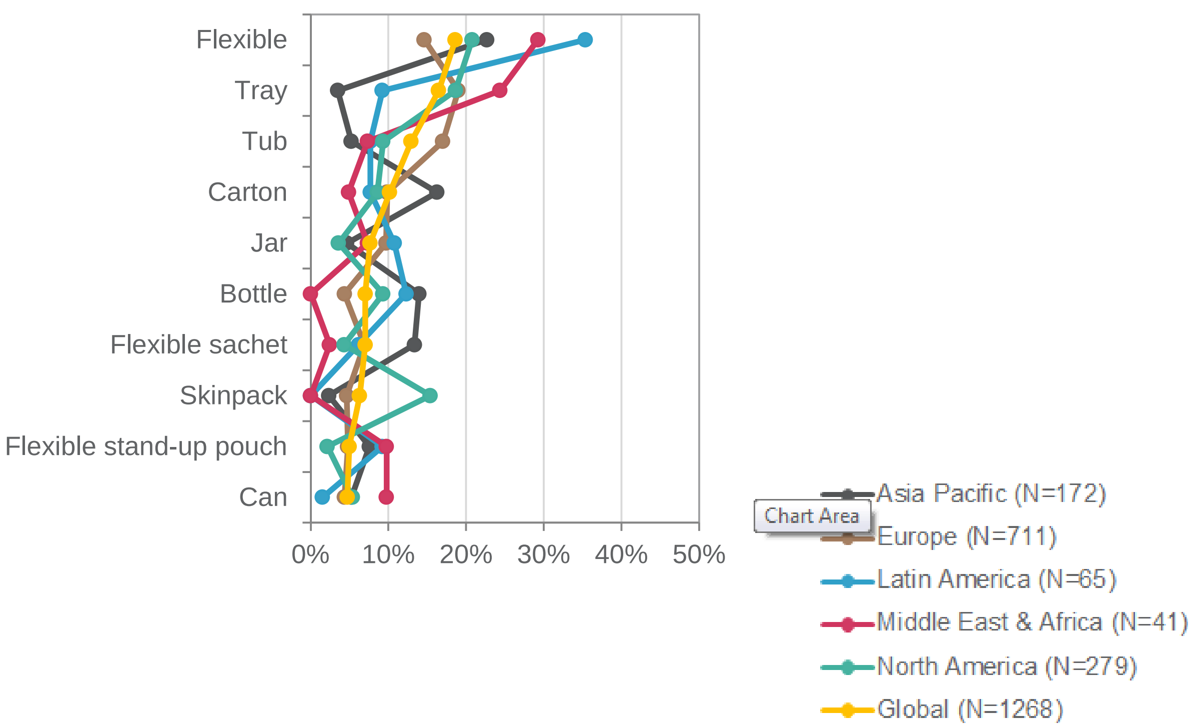
## Top Launch Categories



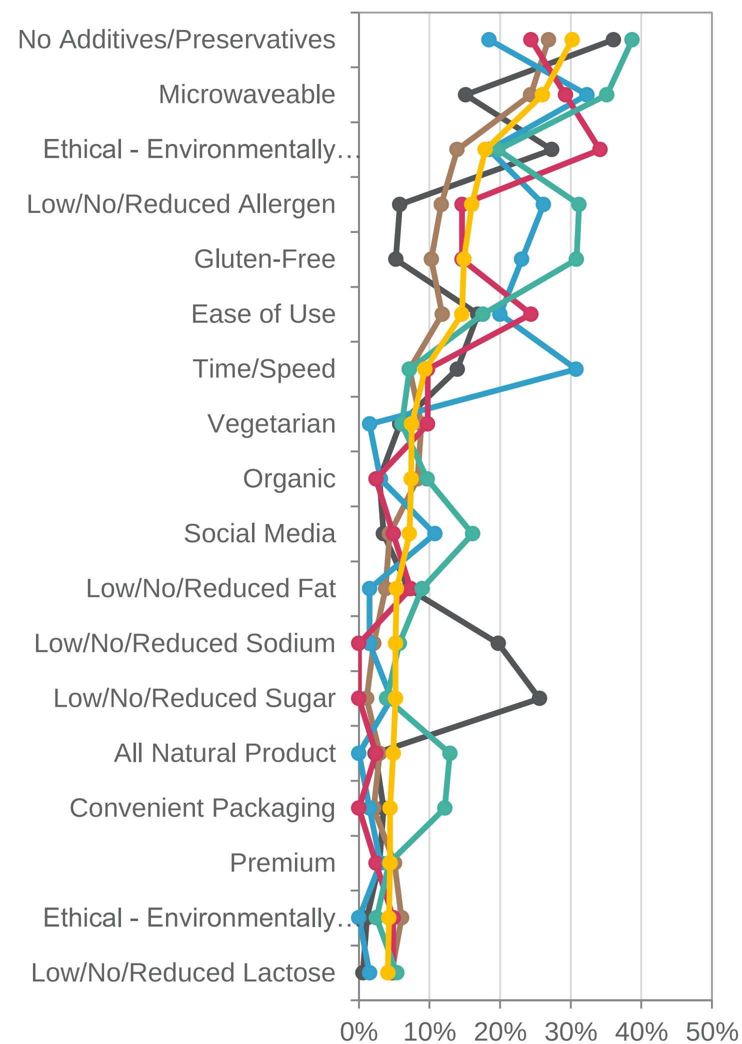
# Celery Launches

- Flexible packaging was the most popular pack format used, particularly in Latin America and the Middle East.
- No additive & preservatives and microwavable claims were key claims utilised over the past three months. North America were more likely to associate health claims with their products.

## Pack Formats Launched




## Top Claims Launched



# Innovative Celery Launches:
## L3M (June - August 2014)

### Ito En Jujitsu Yasai To Nomu Yogurt Vegetable Yogurt Drink (Japan)

Ito En Jujitsu Yasai To Nomu Yogurt Vegetable Yogurt Drink features Enterococcus faecalis, eight vegetables and two fruits. It contains dietary fibre equivalent to one whole lettuce. It has 1% fruit juice content and retails in a recyclable 240ml pack. Launched on May 26, 2014 with an RRP of 162 yen.


**Claims:**
High/Added Fiber, Ethical - Environmentally Friendly Package

### Big Party Vegetable Snack with Hummus Dip (Netherlands)

Big Party Snackgroente met Houmous Dip (Vegetable Snack with Hummus Dip) comprises carrot, cucumber and celery sticks with a hummus dip. The product retails in a 475g pack.


**Claims:**
N/A

### Danie Kachny Zamojski Style Tripe Soup (Poland)

Danie Kachny Flaczki po Zamojsku (Zamojski Style Tripe Soup) consists of beef tripes in tomato concentrate. This sterilized product is recommended to be served warm with the addition of bread, retailing in a 500g pack.


**Claims:**
N/A

### Danie Express Fresh Vegetable & Meat Broth (Poland)

Danie Express Swiezy Rosol Miesno-Warzywny (Fresh Vegetable & Meat Broth) is now available. This popular Polish soup is made with beef, selected vegetables and olive oil which are slowly cooked together to obtain a natural brew with a strong flavour. It is ready to eat and can also be used as a gourmet base for sauces and other soups.


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

Source: Mintel (2014)

# Innovative Celery Launches:
## L3M (June - August 2014)

### Nuta Smaku Sekrety Smaku Universal Vegetable Spice (Poland)

Nuta Smaku Sekrety Smaku Przyprawa Uniwersalna Warzywna (Universal Vegetable Spice) is designed for meat, fish or vegetable dishes, soups, and sauces. The product retails in a 200g resealable pack.


**Claims:**
Convenient Packaging, No Additives/Preservatives

### Skin Food Vita Whitening Swirl Pact SPF 20 PA+ (South Korea)

Skin Food Vita Whitening Swirl Pact SPF 20 PA+ has been relaunched with a new brand name (previously part of the collection Skin Food Jungle Fruits), and is now available in a newly designed 14g pack. It is described as a hydrating foundation compact, based on water, so it can be smoothly and naturally absorbed into the skin.


**Claims:**
Moisturising / Hydrating, Vitamin/Mineral Fortified, UV Protection, Whitening

### Ülker Kellogg's Special K Basil Crackers (Turkey)

Ülker Kellogg's Special K Feslegenli Kraker (Basil Crackers) are a source of fibre and contain only 62 calories per portion. The halal certified product is ideal as a snack between meals and retails in a 30g pack.


**Claims:**
Halal, Slimming, Low/No/Reduced Calorie

### Vini & Bal's Fiery Mirchi Cook-In-Sauce (UK)

Vini & Bal's Fiery Fiery Mirchi Cook-In-Sauce has been relaunched previously under the Rustic Sauces range. This rustic Indian curry sauce is heated by three types of chilli, is 100% natural, gluten-free, suitable for vegetarians, and just needs the addition of red meat, chicken, seafood, vegetables or paneer.


**Claims:**
All Natural Product, Low/No/Reduced Allergen, Ease of Use, Gluten-Free, Social Media, Vegetarian

Source: Mintel (2014)

# Innovative Celery Launches:
## L3M (June - August 2014)

### Today's Kitchen Beef Pot Roast Kit (USA)

Today's Kitchen Beef Pot Roast Kit includes beef roast containing up to 12% solution, vegetables and a seasoning packet. The USDA certified product is ready to cook, is high in protein and retails in a 62-oz. package.


**Claims:**
Ease of Use, High Protein

### Hey Song Cup of Juice Fibre Lactic Acid Assorted Vegetable Juice Drink (Taiwan)

Hey Song Cup of Juice Fibre Lactic Acid Assorted Vegetable and Fruit Juice Drink is free from added sugar and fructose. It has a 65% fruit juice content and is enriched with dietary fibre. The product retails in a 240ml pack


**Claims:**
No information available

### Unilver Food Solutions Knorr Professional Liquid Concentrated Vegetable Base (Canada)

Unilver Food Solutions Knorr Professional Liquid Concentrated Vegetable Base has been repackaged in a newly designed 946ml bottle. It is free from gluten, artificial flavours, colours, HVP and trans fat, and is said to dissolve faster than paste bases.


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

### Auchan Poultry Stock Cubes (France)

Auchan Bouillon de Volaille (Poultry Stock Cubes) have been reformulated with a new recipe. This product is suitable for cooking pasta, rice, vegetables, soups, sauces and meats, and retails in a 150g pack containing 15 cubes.


**Claims:**
No information available

Source: Mintel (2014)

# Australian Celery Launches:
## L3M (June - August 2014)

### Momo's Meals Free Range Chicken Stock


**Claims:**
No Additives/Preservatives, All Natural Product, Low/No/Reduced Allergen, Low/No/Reduced Fat, Ethical - Animal, Microwaveable, Gluten-Free, Social Media

### Pukka Detox Organic Aniseed, Fennel & Cardamom Tea


**Claims:**
All Natural Product, Caffeine Free, Kosher, Other (Functional), Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Ethical - Human, Organic, Digestive (Functional)

### I Pastai Girandola di Mare Seafood Ravioli


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

### Robertsons Rajah Mild & Spicy Curry Powder


**Claims:**
Halal

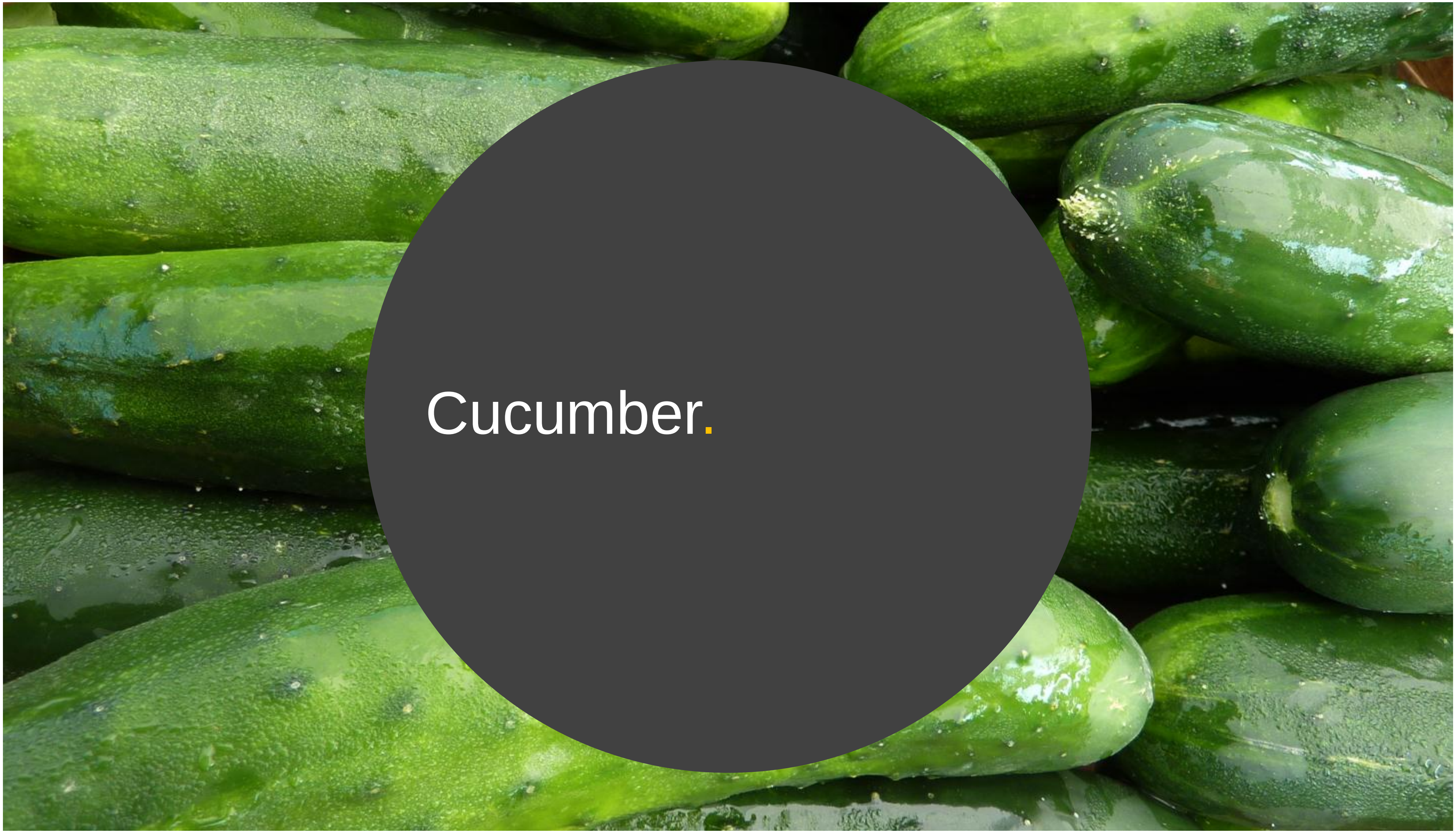
### Latina Fresh Chicken Risotto


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

### Aussie Kitchen Split Pea & Smoked Ham with a Few Other Veggies


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

Source: Mintel (2014)



# Cucumber.

# Purchase and Consumption Behaviour

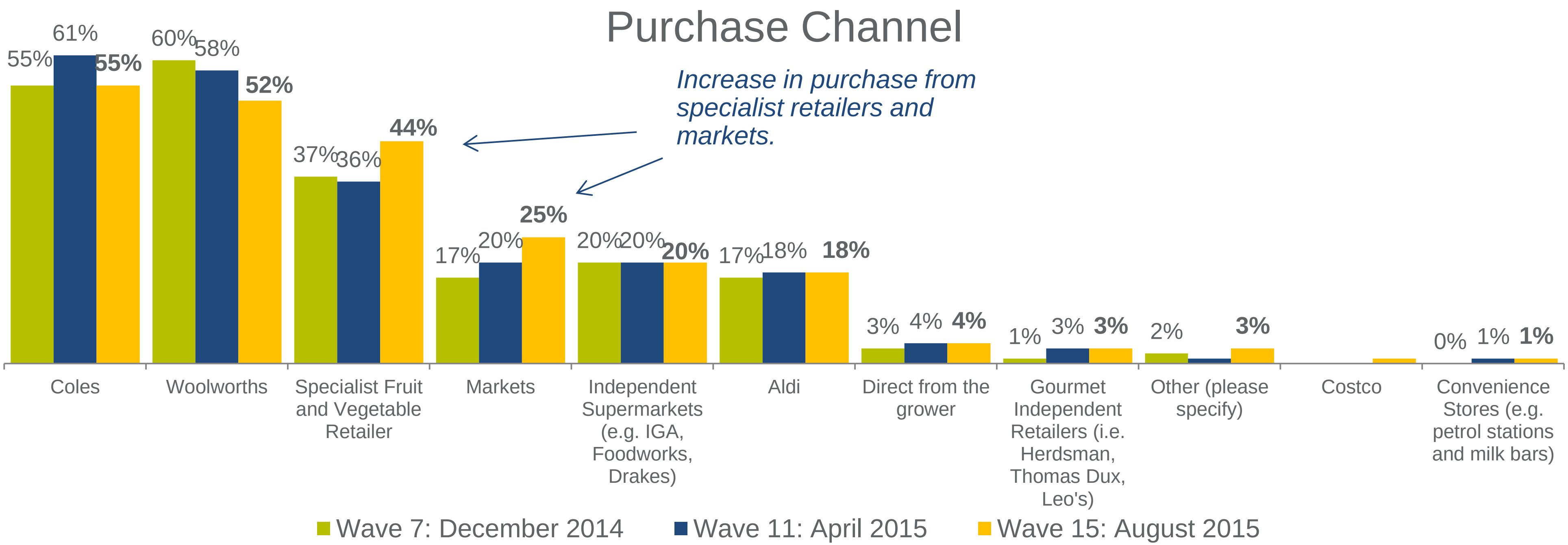
**Average Purchase**
**4.3** times per month

▲ 4.9 times, Wave 7
— 4.3 times, Wave 11

**Average Consumption**
**12.2** times per month

▼ 13.3 times, Wave 7
▼ 12.6 times, Wave 11

- Purchase frequency has been maintained from Wave 11, which represents a slight decrease from Wave 7. Consumption frequency has been declining since Wave 7, which may be due to seasonality, transitioning from summer to winter.
- Coles and Woolworths were the key purchase locations for cucumbers. In Wave 15, we see an increase in buying from Specialist Fruit and Veg retailers, and Markets.




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 3, N=503, Wave 7, N=352, Wave 11, N=301, Wave 15, N=337

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

# Average Spend and Price Sensitivity

## Average weight of purchase

The average consumer typically purchased **760g** of Cucumber in August 2014, which was a slight increase from Wave 11.

- ▼ 700g, Wave 7
- ▼ 600g, Wave 11

## Recalled last spend

The average recalled last spend was **$3.30**. This was slightly higher than past waves.

- ▼ $2.80, Wave 7
- ▼ $2.50, Wave 11

## Value for money

On average, consumers perceived Cucumber to be good value for money **(6.1/10)**, which was a slight fall from previous waves.

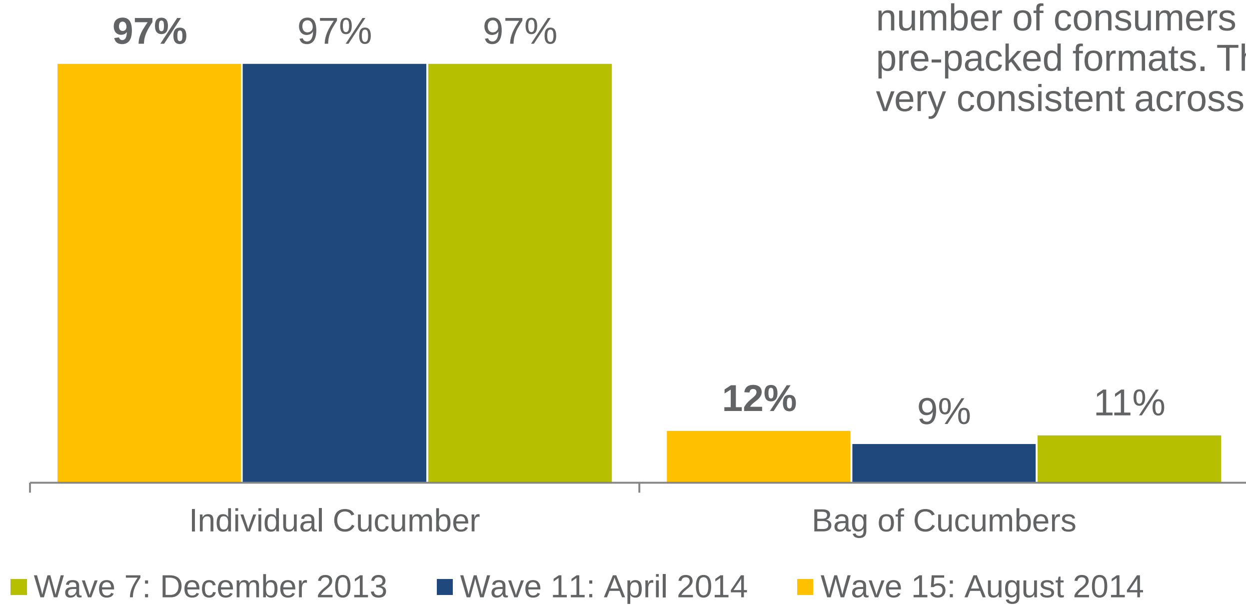
- ▲ 6.2/10, Wave 7
- ▲ 6.2/10, Wave 11

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 3, N=503, Wave 7, N=352, Wave 11, N=301, Wave 15, N=337



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

# Pack Formats Purchased



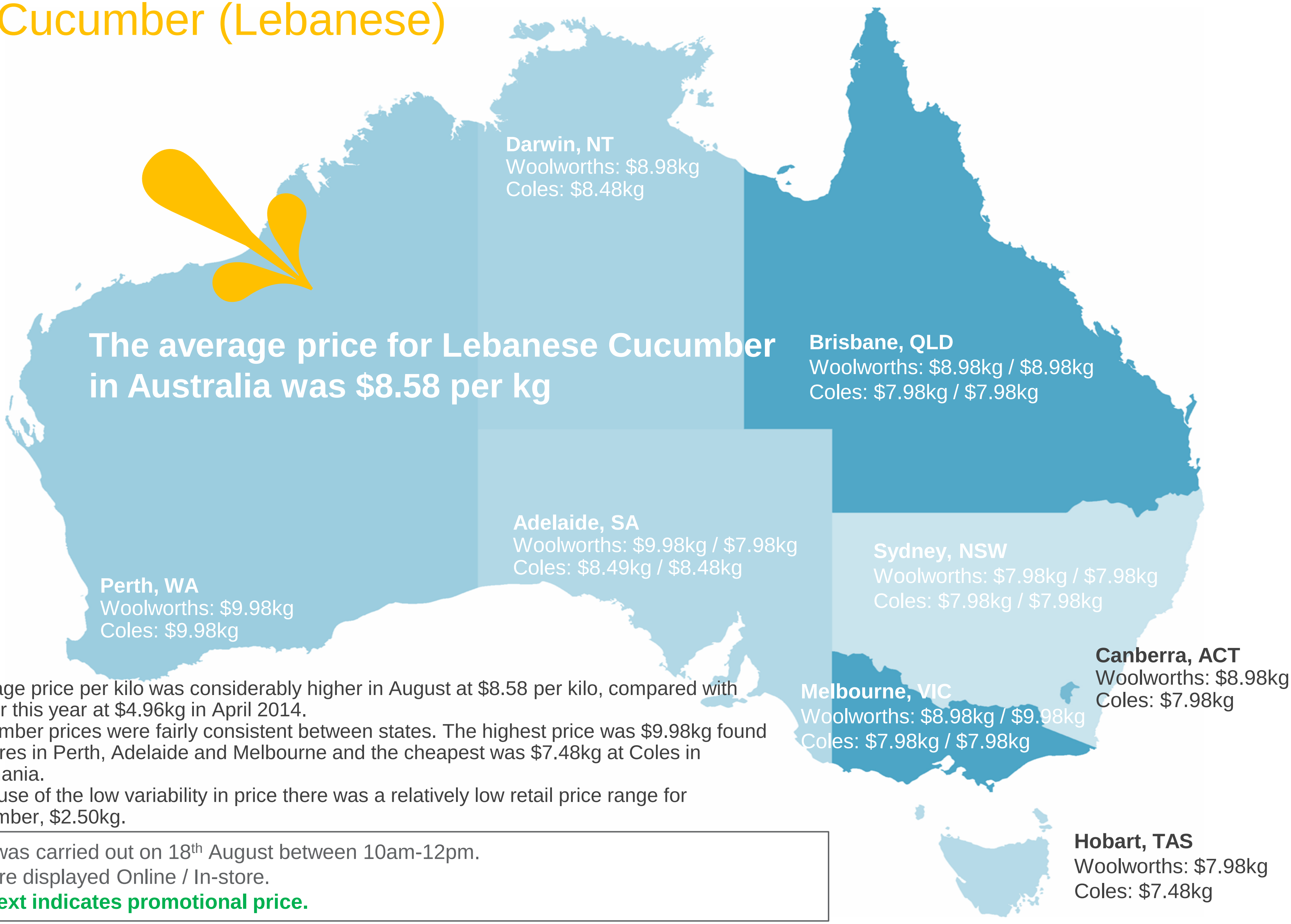

- Cucumbers are predominately purchased individually, with only a small number of consumers purchasing in pre-packed formats. This has remained very consistent across waves.

| | Individual | Bag |
|---|---|---|
| Wave 7 | 2.3 | 2.5 |
| Wave 11 | 2.2 | 2.5 |
| Wave 15 | 2.5 | 2.2 |

Q3a. How much <commodity> does this typically equate to?
Sample Wave 3, N=503, Wave 7, N=352, Wave 11, N=301, Wave 15, N=337

# Online and In-store Commodity Prices

## Cucumber (Lebanese)

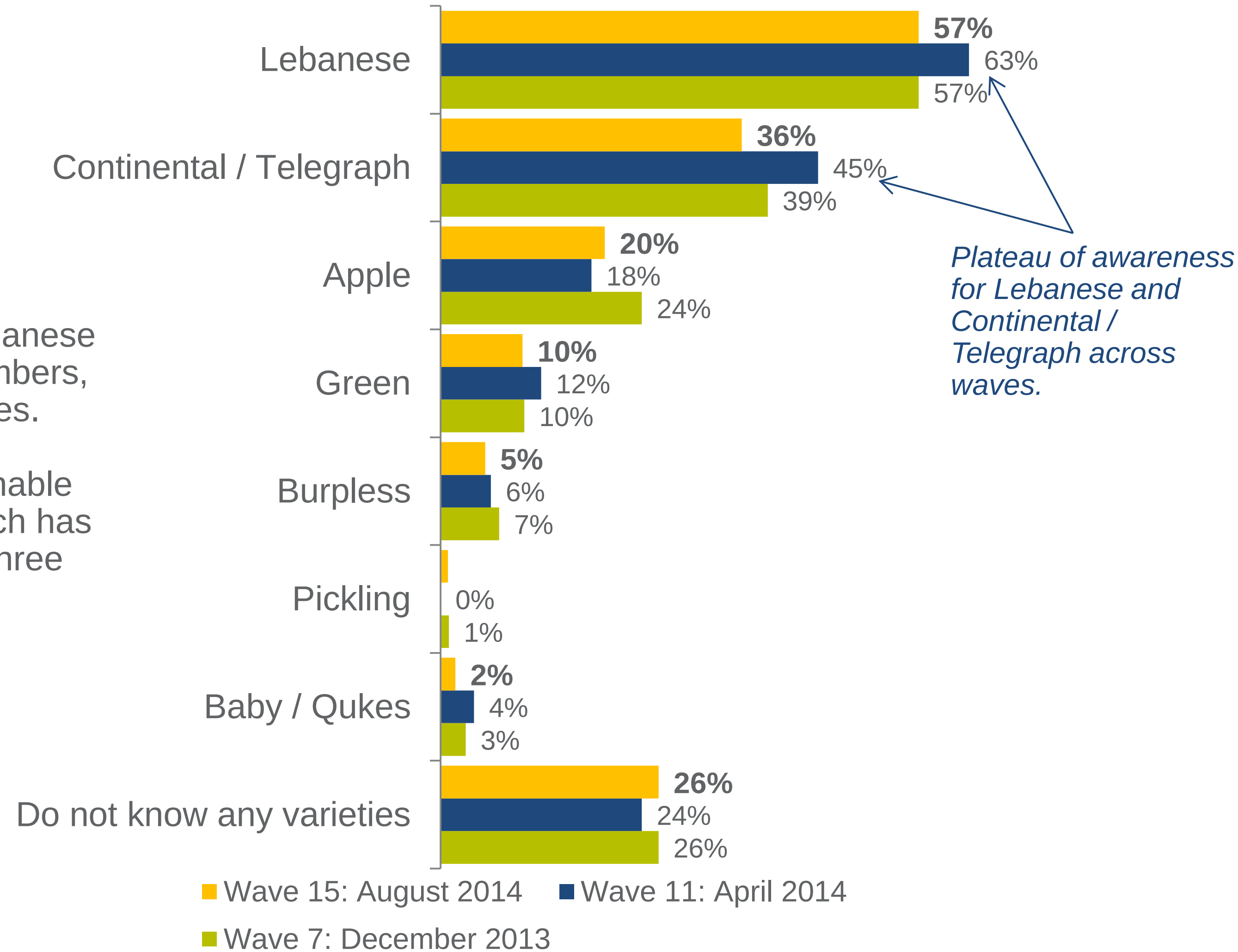



- Average price per kilo was considerably higher in August at $8.58 per kilo, compared with earlier this year at $4.96kg in April 2014.
- Cucumber prices were fairly consistent between states. The highest price was $9.98kg found in stores in Perth, Adelaide and Melbourne and the cheapest was $7.48kg at Coles in Tasmania.
- Because of the low variability in price there was a relatively low retail price range for cucumber, $2.50kg.

Pricing was carried out on 18th August between 10am-12pm.
Prices are displayed Online / In-store.
**Green text indicates promotional price.**

# Spontaneous Awareness

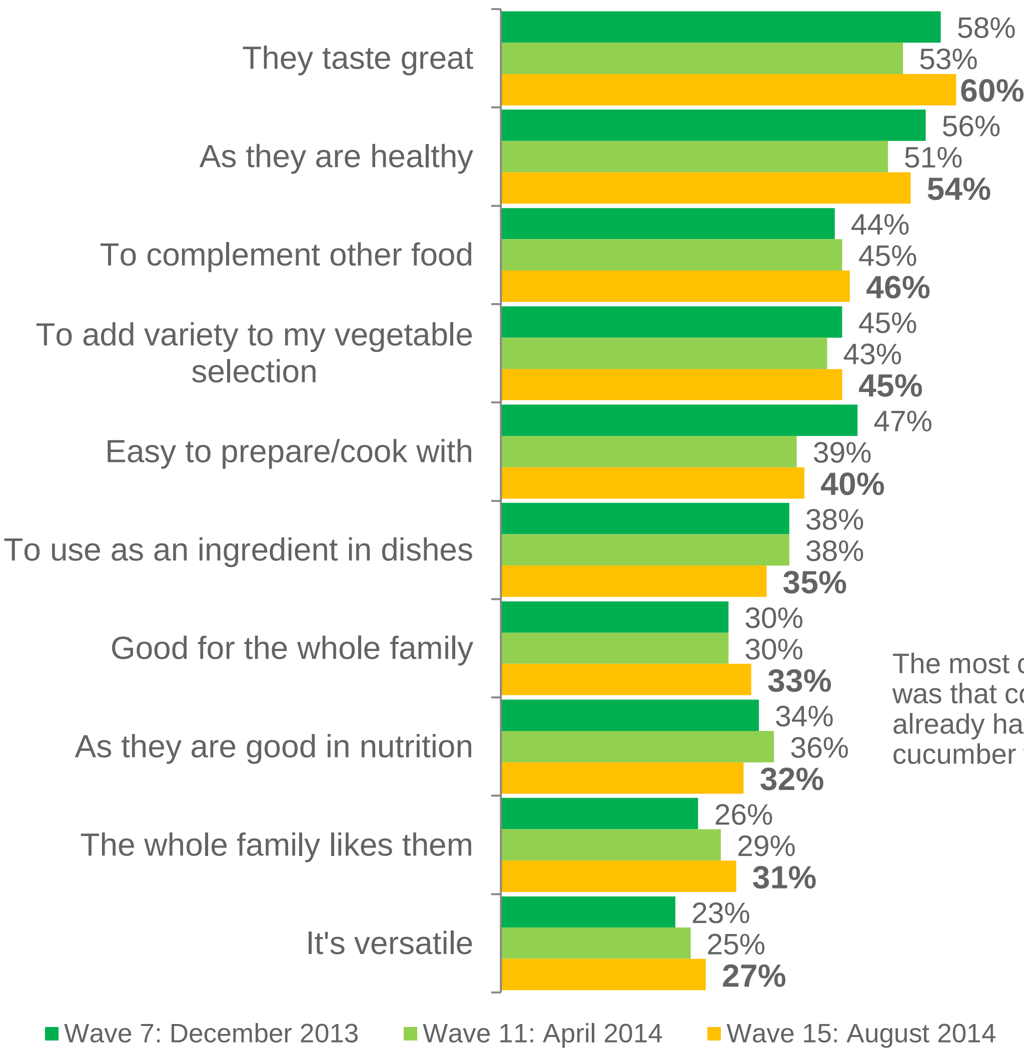
- There was a strong recall for Lebanese and Continental/Telegraph cucumbers, which has plateaued across waves.
- A quarter of respondents were unable to recall a type of cucumber, which has remained consistent across the three waves.




Sample Wave 3, N=503, Wave 7, N=352, Wave 11, N=301, Wave 15, N=337
Q6a. What types/varieties of <commodity> are you aware of? (unprompted)

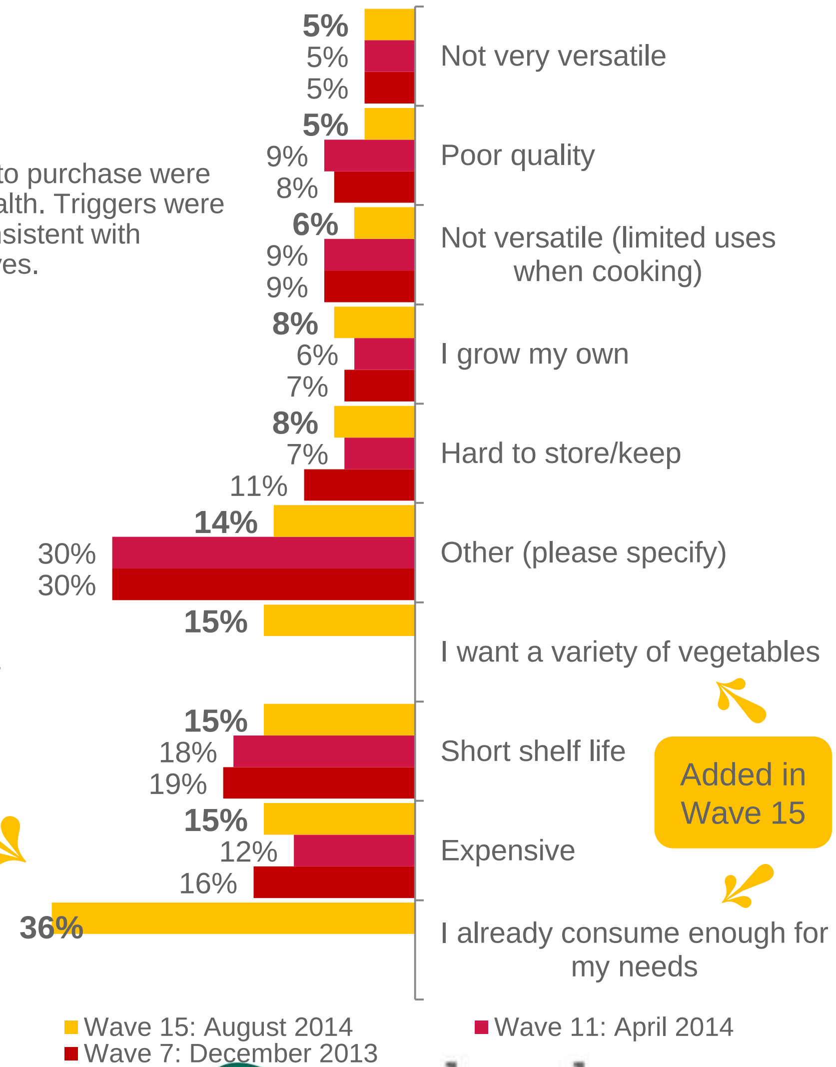
# Triggers and Barriers to Purchase

## Triggers




Key triggers to purchase were taste and health. Triggers were relatively consistent with previous waves.

## Barriers




The most common barrier was that consumers already have enough cucumber for their needs.

Sample Wave 3, N=503, Wave 7, N=352, Wave 11, N=301, Wave 15, N=337

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

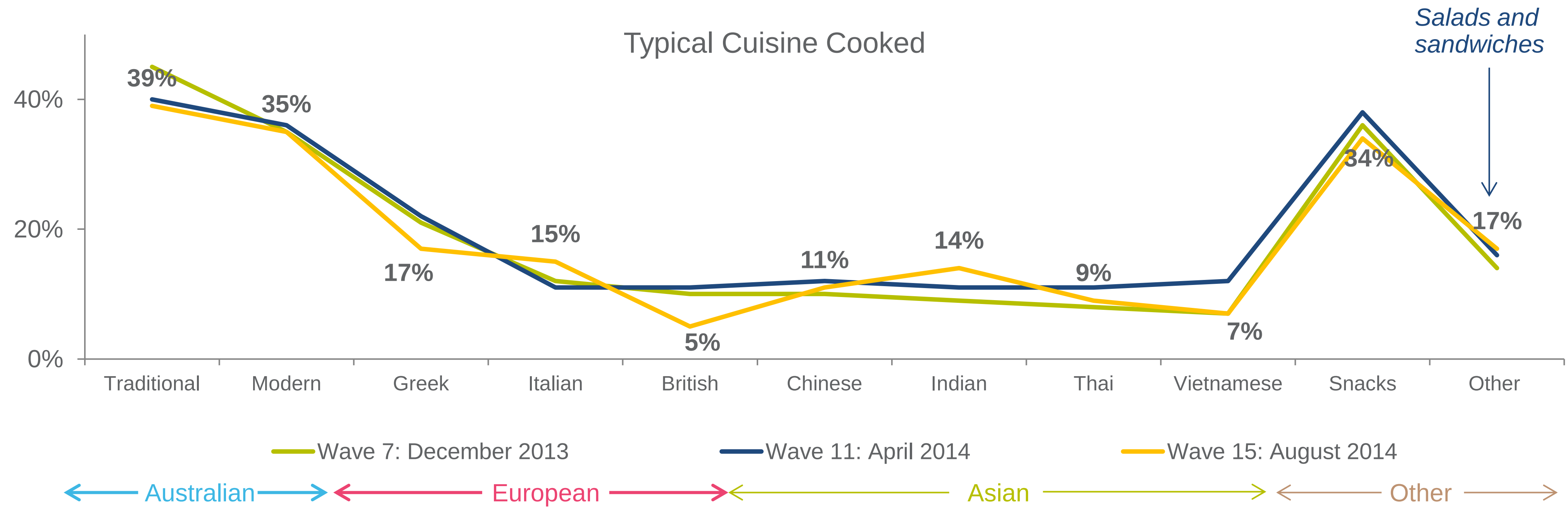
Q8. Which reason best describes why you don't buy <commodity> more often?

# Cooking Preferences & Occasions

- From previous waves there has been a fall in the use of Cucumber in Greek, British and Vietnamese cuisine, with increases Italian and Indian cuisine.
- There have been small shifts in consumption occasion, however the top 3 remain consistent from previous waves.

## Wave 11 Top 5 Consumption Occasions

| | Wave 15 | Wave 11 | Wave 7 |
|---|---|---|---|
| Weekday Lunch | **40%** | ▲ | ▼ |
| Every-day | **39%** | ▼ | ▼ |
| Quick Meals | **37%** | – | ▼ |
| Weekend Lunch | **36%** | ▼ | ▼ |
| Weekday Dinner | **32%** | ▲ | ▲ |

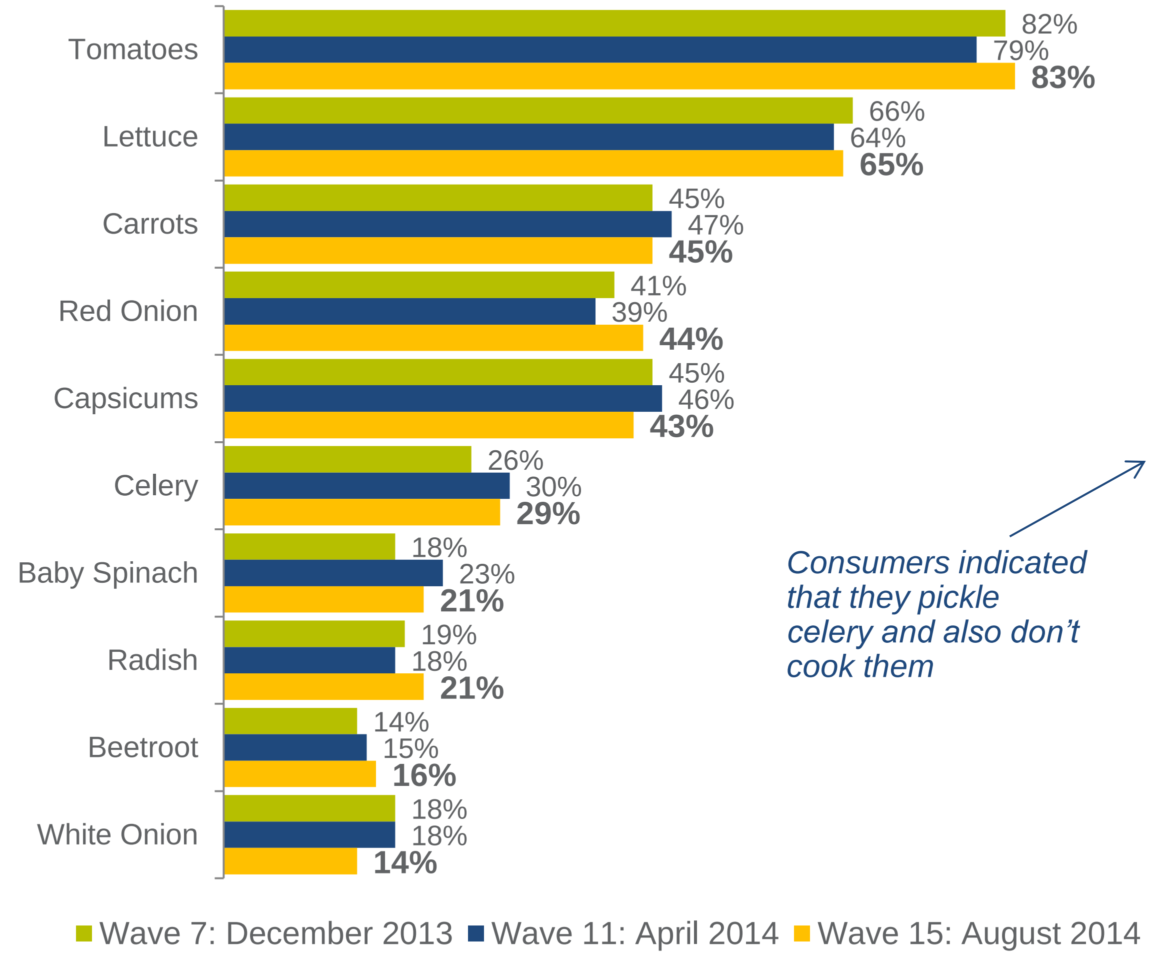



Sample Wave 3, N=503, Wave 7, N=352, Wave 11, N=301, Wave 15, N=337
Q10. What cuisines do you cook/consume that use <commodity> ?
Q11. Which of the following occasions do you typically consume/use <commodity> ?

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

# Cooking Preferences

Top 10 Accompanying Vegetables




- Cucumber was eaten raw for the majority of consumption occasions.
- More often than not, cucumber was served with tomatoes and lettuce, typical salad ingredients.

*Consumers indicated that they pickle celery and also don't cook them*

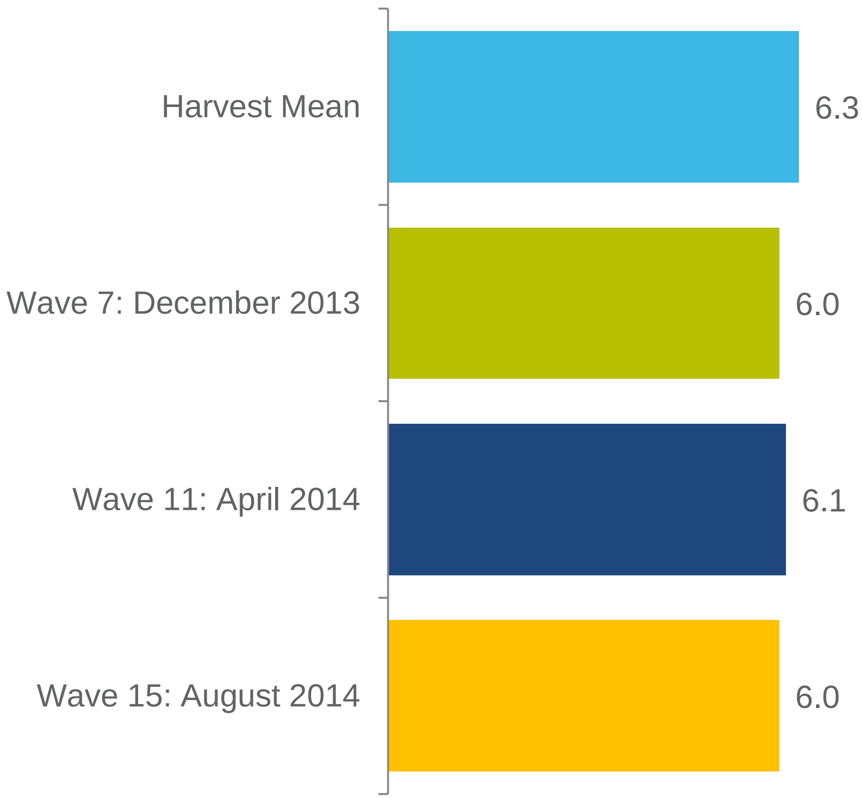
| Top 10 Cooking Styles | | | |
|---|---|---|---|
| | Wave 7 | Wave 11 | Wave 15 |
| Raw | 84% | 79% | 82% |
| Other | 12% | 18% | 12% |
| Stir frying | 9% | 8% | 9% |
| Steaming | 3% | 3% | 5% |
| Blend | 3% | 1% | 4% |
| Soup | 2% | 5% | 4% |
| Sautéing | 2% | 1% | 4% |
| Grilling | 2% | 2% | 3% |
| Microwave | 2% | 2% | 2% |
| Roasting | 2% | 2% | 2% |

Sample Wave 3, N=503, Wave 7, N=352, Wave 11, N=301, Wave 15, N=337
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?

HAL Horticulture Australia colmar brunton.

# Importance of Provenance

- Although lower than the Harvest mean, importance of cucumber provenance has been consistent across waves.




Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 3, N=503, Wave 7, N=352, Wave 11, N=301, Wave 15, N=337

# Freshness and Longevity

Expected to stay fresh for **8.1** days

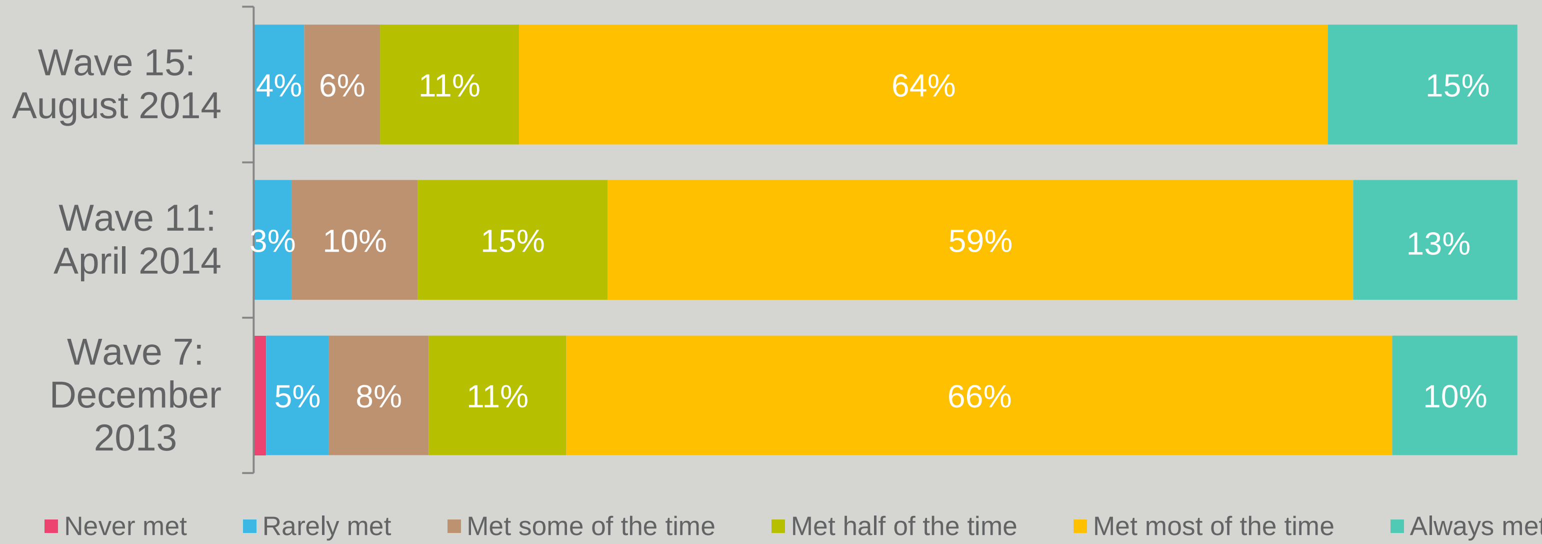
▼ 7.7 days, Wave 7

— 7.7 days, Wave 11

⇛ Cucumber was expected to stay fresh for just over a week once purchased. This was an increase from previous waves.

⇛ Close to 4 out of 5 respondents felt their expectations of cucumber freshness were met most of the time or always. This represents a gradual increase from Wave 7.

## Expectations Met




Sample Wave 3, N=503, Wave 7, N=352, Wave 11, N=301, Wave 15, N=337
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> ?



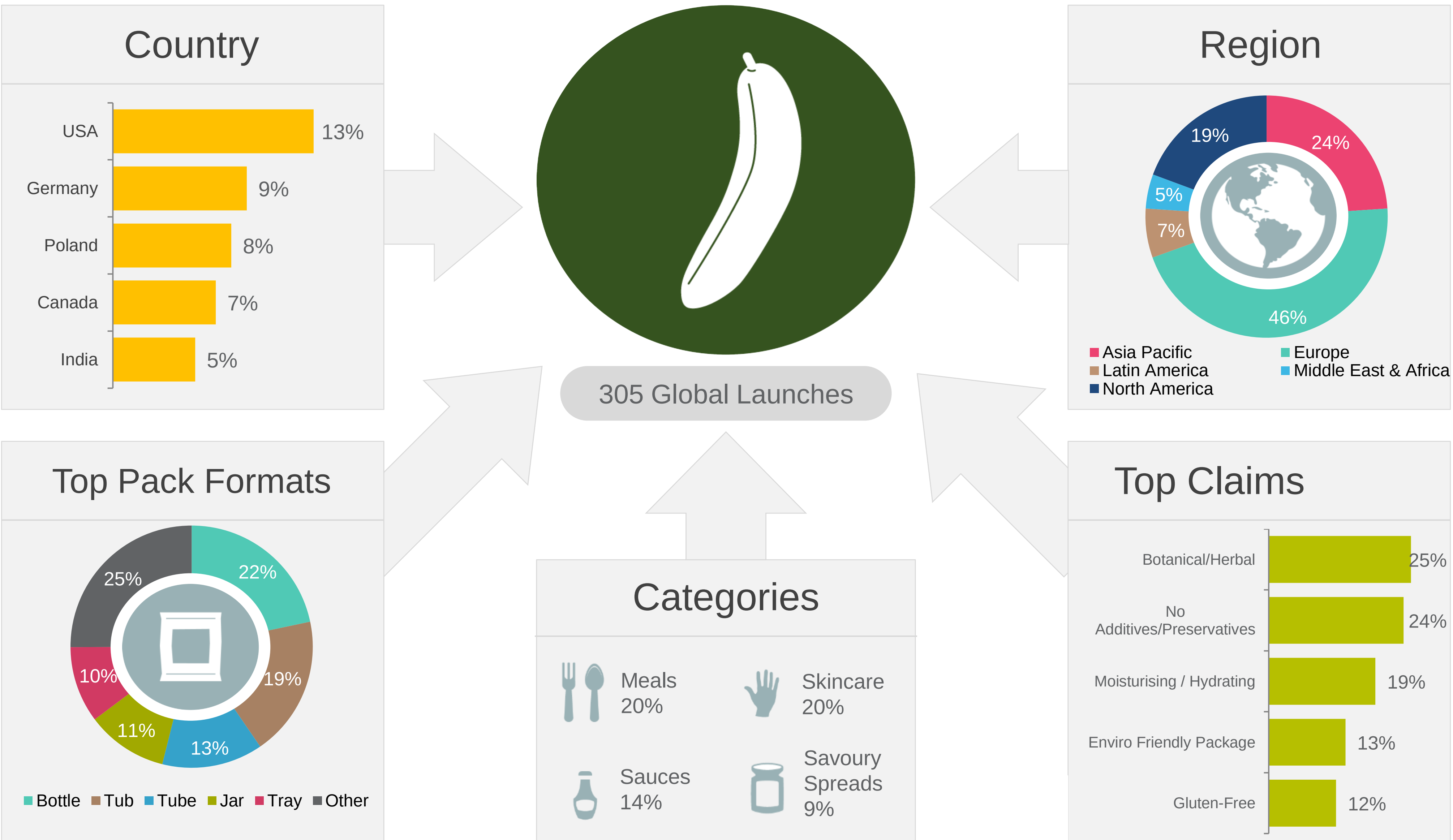
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

# Trends: Cucumber

# Cucumber Global NPDs

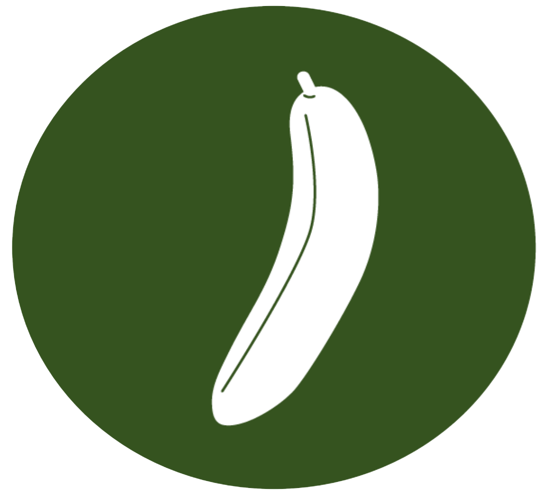
## June – August 2014

There were 305 products launched globally in the last three months that contained cucumber as an ingredient. The majority of launches occurred in Europe and Asia Pacific regions. The key categories for launches were meals, skincare and sauces & seasonings.



# Cucumber Product Launches:
## Last 3 Months (June-August 2014)
## Summary

- There were 305 cucumber products launched globally. This was slightly more than previous trends.
- Four cucumber products were launched in Australia over the last three months. These were mainly skincare products.
- Key regions for launch were Europe (46%) and Asia Pacific (24%).
- Bottles (22%) and Tubs (19%) remained the most common packaging formats used.
- Top category launches were meals (20%), skincare (20%) and sauces & seasonings (14%).
- Consistent with previous trends, top claims used for products were botanical/herbal (25%), no additives (24%) and moisturising/hydrating (24%).
- The most innovative launch was Cool & Cool Cucumber Eye Pads in India (examples of these can be found in the following pages).

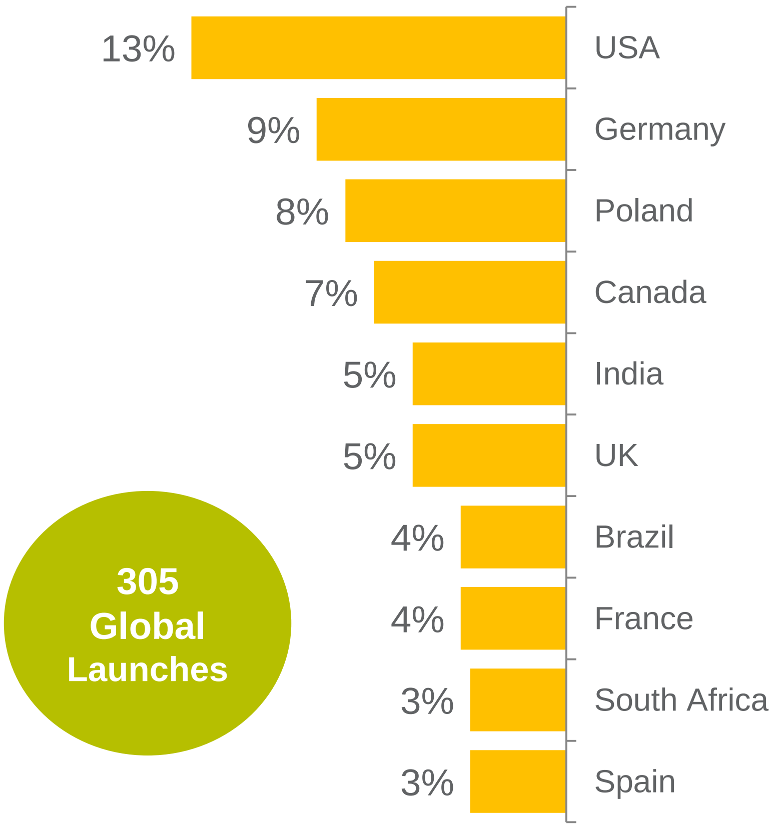


Source: Mintel (2014)

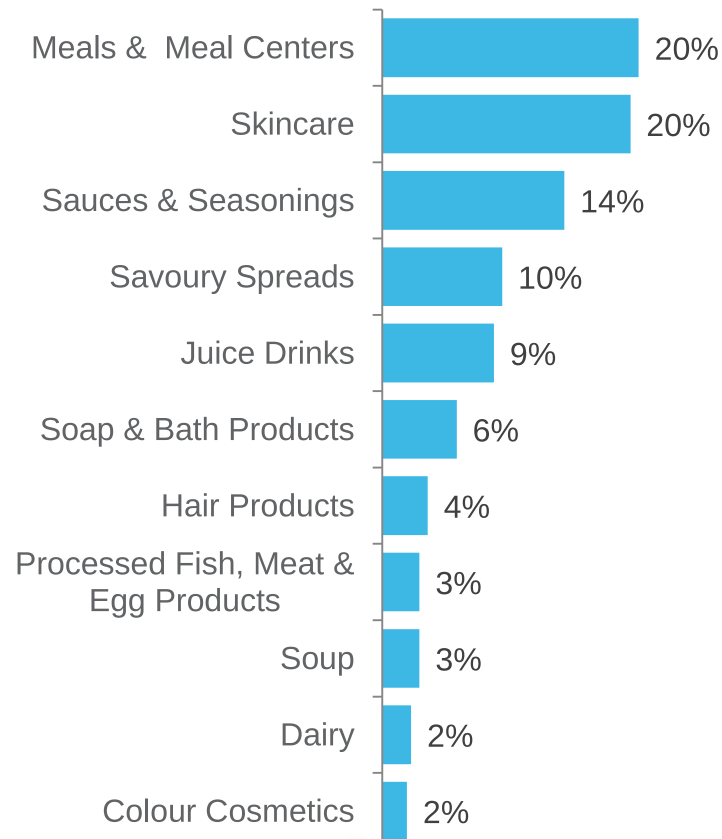
# Cucumber Launches

- USA was the key country for cucumber launches over the past 3 months. Germany and Poland also had a large number of launches.
- Key categories for products launched were meals, skincare and sauces & seasonings.

## Top Launch Countries

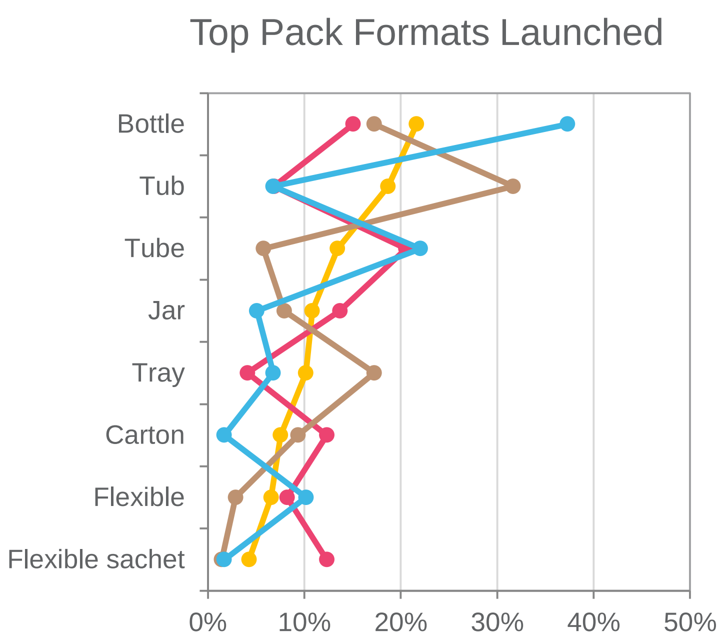


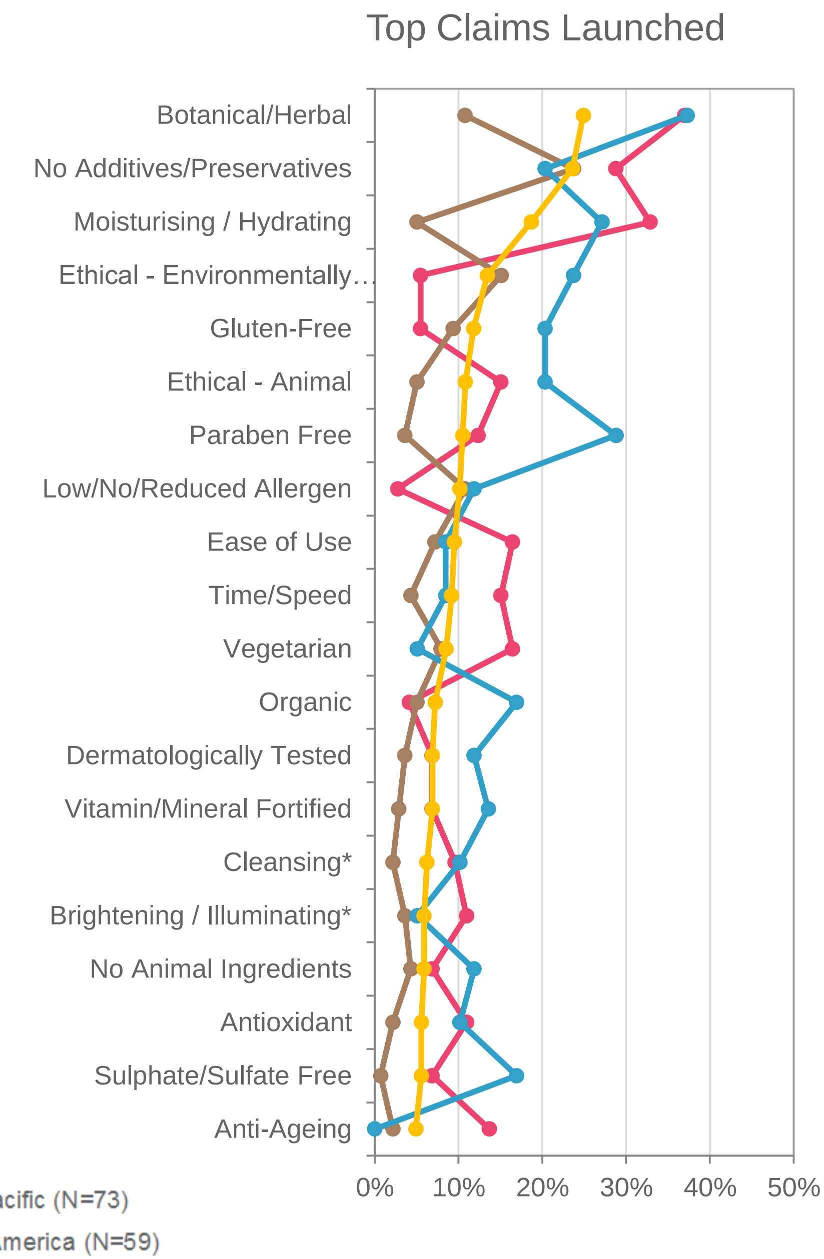

## Top Launch Categories



# Cucumber Launches

- Claims relating to skincare we commonly used including Botanical and Hydrating. These were particularly common in Asia Pacific.
- Key formats used for products launched in the last three months were bottles and tubs. Bottles were especially common in North America.




Only regions with n >30 are displayed

# Innovative Cucumber Launches:
## L3M (June – August 2014)

### Avon Naturals Face Tea Tree & Cucumber Purifying Toner (Poland)

Avon Naturals Face Tea Tree & Cucumber Tonik Odswiezajaco-Matujacy (Purifying Toner) is designed for mixed complexions and is said to feature mattifying and refreshing properties. The product retails in a 100ml pack.


**Claims:**
Botanical/Herbal, Toning*, Mattifying*

### Aryanveda Purifying Anti Oxidant Vegetable Pack (India)

Aryanveda Purifying Anti Oxidant Vegetable Pack is said to nourish and hydrate the facial skin by removing impurities and excess oil. The product is said to regulate the barrier function of the skin by a normalization of the adhesion/desquamation process.


**Claims:**
All Natural Product, Cleansing*, Botanical/Herbal, Ethical - Animal, No Animal Ingredients, Vegetarian, Antioxidant, Mattifying*, Moisturising / Hydrating

### Vegesentials Beetroot, Blueberry & Cucumber Smoothie (UK)

Vegesentials Beetroot, Blueberry & Cucumber Smoothie is now available. This half fruit and half veg product is a natural source of vitamin C and potassium, is suitable for vegetarians and vegans, and 100% free from added sugar and water, additives, preservatives, concentrates, gluten and dairy.


**Claims:**
Low/No/Reduced Lactose, No Additives/Preservatives, Low/No/Reduced Allergen, Vegan, Ethical - Environmentally Friendly Package, Social Media, Low/No/Reduced Sugar, Ethical - Charity, Gluten-Free, No Animal Ingredients, Vegetarian

### Bolthouse Farms Cucumber Dill Greek Yogurt Dressing (USA)

Bolthouse Farms Cucumber Dill Greek Yogurt Dressing is crafted with traditional Greek yogurt and is said to have a deliciously creamy texture. It is low in fat, contains only 40 calories per serving and is free of gluten, trans fat, preservatives, artificial colors and flavors.


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

Source: Mintel (2014)

# Innovative Cucumber Launches:
## L3M (June – August 2014)

### 7-Eleven Korean Kimchi Flavoured Cold Noodles (Taiwan)

7-Eleven Korean Kimchi Flavoured Cold Noodles are now available. This product features a special sauce made with green onion, garlic and kimchi powder, contains no preservatives, and is ready-to-eat. It retails in a 307g pack.


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

### Voelkel Cucumber Juice (Germany)

Voelkel Gurkensaft (Cucumber Juice) is an organic, 100% directly pressed cucumber juice with lemon. This Fair, 100% natural, vegan product is suitable for fasting, and retails in a 0.7L bottle featuring the Demeter logo that certifies bio-dynamic quality.


**Claims:**
All Natural Product, Vegan, Ethical - Environmentally Friendly Product, Ethical - Human, Organic, No Animal Ingredients

### Cool & Cool Cucumber Eye Pads (India)

Cool & Cool Cucumber Eye Pads are formulated with vitamin-rich cucumber extracts and rejuvenating natural extracts including ginseng, ginkgo, aloe, green tea and mulberry, to reduce puffiness and dark circles, soothe and freshen up stressed eyes, and alleviate stress. The product also features a cucumber fragrance, and retails in a 4-unit pack.


**Claims:**
Botanical/Herbal, Reduces Dark Circles / Puffiness*

### Rittergut Valenbrook Cucumber-Mint Chutney (Germany)

Rittergut Valenbrook Gurken-Minz Chutney (Cucumber-Mint Chutney) is an authentic regional cucumber and mint chutney, made according to a North German traditional recipe. The product retails in a 190g pack.


**Claims:**
No information available

Source: Mintel (2014)

# Innovative Cucumber Launches:
## L3M (June – August 2014)

### Bay Valley Foods Peter Pipers Kosher Dill Pickle (USA)

Bay Valley Foods Peter Pipers Kosher Dill Pickle is now available. The product retails in a pack containing one unit.


**Claims:**
Kosher

### Lowicz Cucumber and Mint Syrup (Poland)

Lowicz Syrop o Smaku Ogorka z Mieta (Cucumber and Mint Syrup) is free from preservatives. This limited edition beverage concentrate retails in a 440ml pack featuring an anti-drip cap.


**Claims:**
No Additives/Preservatives, Limited Edition

### Burt´s Bees Facial Cleansing Towelettes (Colombia)

Burt´s Bees  Toalla de Limpieza Facial Pepino y Salvia (Facial Cleansing Towelettes) is formulated with cucumber and sage for normal to dry skin. The product is designed to remove dirt, oil and make-up without rinsing, and is made with 99.1% natural ingredients. It is dermatologist and ophthalmologist tested and is made with an FSC certified cloth.


**Claims:**
Botanical/Herbal, Dermatologically Tested, Ophthalmologically Tested, Ethical - Environmentally Friendly Product, Cleansing*

### Bret's Les Aromatisés Mustard Pickles Flavoured Potato Chips (Vietnam)

Bret's Les Aromatisés Chips Saveur Moutarde Pickles (Mustard Pickles Flavoured Potato Crisps) are available. This vegetarian product is made with French potatoes and has been cooked in sunflower oil, and retails in a 125g pack. The manufacturer states to reduce the impact on the environment by managing water cycle and by using local supply.


**Claims:**
Vegetarian, Ethical - Environmentally Friendly Product, Ethical - Human

Source: Mintel (2014)

# Australian Cucumber Launches:
## L3M (June – August 2014)



### Nudie & Soda Apple, Cucumber & Kiwifruit Soda


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

### L'Oréal Age Perfect Extraordinary Face Oil


**Claims:**
For Sensitive Skin, Aromatherapy, Botanical/Herbal, Time/Speed, Brightening / Illuminating*, Antioxidant, Toning*, Dermatologically Tested, Anti-Ageing, Moisturising / Hydrating

### Australian Pure Beauty Sensitive Face Scrub


**Claims:**
For Sensitive Skin, Sulphate/Sulfate Free, Paraben Free, Cleansing*, Botanical/Herbal, Exfoliating, Ethical - Animal, No Animal Ingredients, Mineral Oil/Petroleum Free

### Natio Renew Line & Wrinkle Roll-On Eye Serum


**Claims:**
For Sensitive Skin, Botanical/Herbal, Time/Speed, Ease of Use, Collagen Increasing*, Firming*, Plumping*, Moisturising / Hydrating, Anti-Ageing, Reduces Dark Circles / Puffiness*, Reduces Fine Lines / Wrinkles*

Source: Mintel (2014)

# Eggplant.

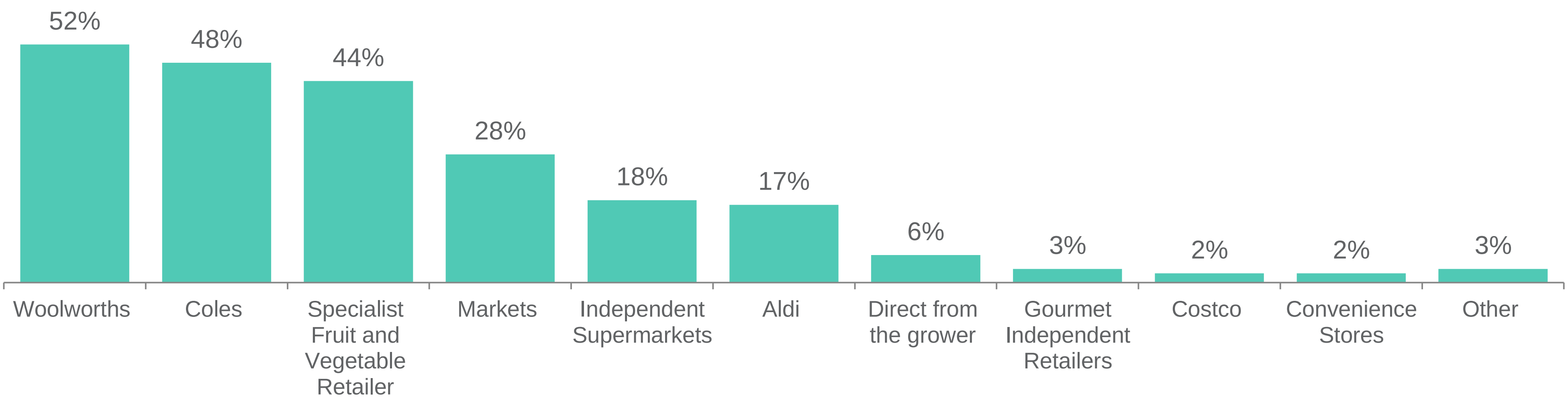
# Purchase and Consumption Behaviour

Average Purchase **3.1** times per month

Average Consumption **4.4** times per month

- Consumers purchase Eggplant on average three times per month, and consuming once per week.
- Eggplant is primarily purchased through mainstream retailers and specialist grocers. Over a quarter of consumers are purchasing from markets.

## 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 15, N=306

# Average Spend and Price Sensitivity

Average weight of purchase

On average consumers purchase **900g** of eggplant.

Recalled last spend

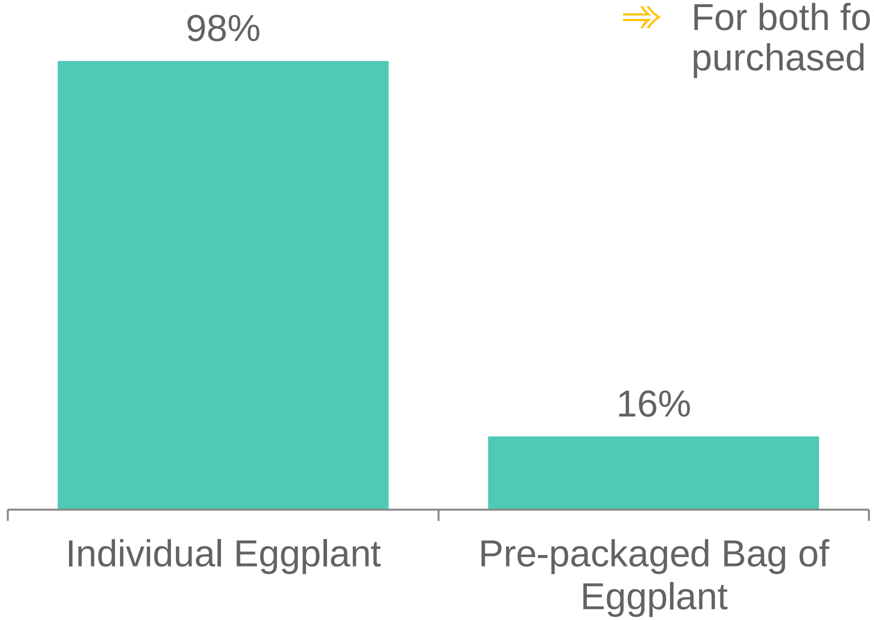
Recalled last spend on eggplant purchase was **$4.39**.

Value for money

Overall consumers' perceived value for money is only fair **(6.0/10)**.

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 15, N=306

# Pack Formats Purchased



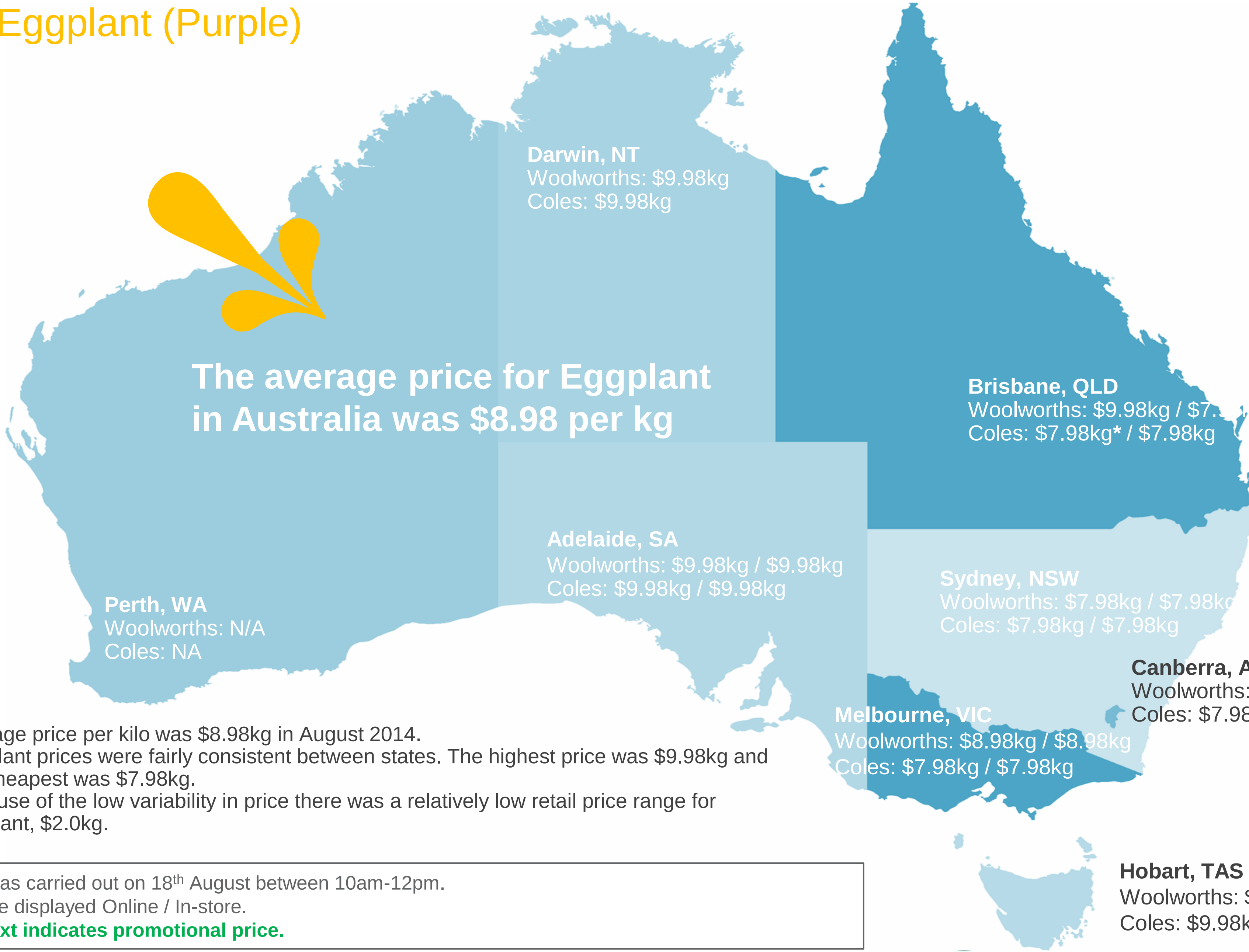

- Nearly all consumer purchase eggplant loose and unpackaged.
- For both formats, two units are purchased per shop.

| Average Amount Purchased | Individual | Pre-packaged Bag |
|---|---|---|
| Wave 15: August 2014 | 2.0 | 2.0 |

Q3a. How much <commodity> does this typically equate to?
Sample Wave 15, N=306

# Online and In-store Commodity Prices

## Eggplant (Purple)

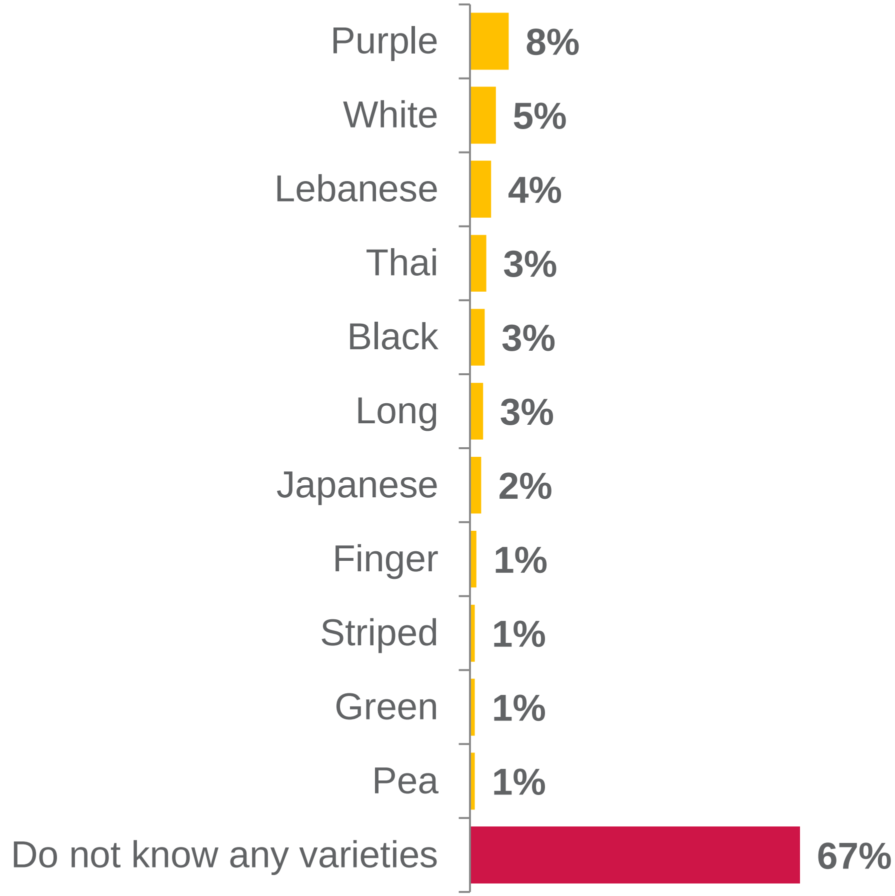



- Average price per kilo was $8.98kg in August 2014.
- Eggplant prices were fairly consistent between states. The highest price was $9.98kg and the cheapest was $7.98kg.
- Because of the low variability in price there was a relatively low retail price range for eggplant, $2.0kg.

Pricing was carried out on 18th August between 10am-12pm.
Prices are displayed Online / In-store.
**Green text indicates promotional price.**

# Spontaneous Awareness

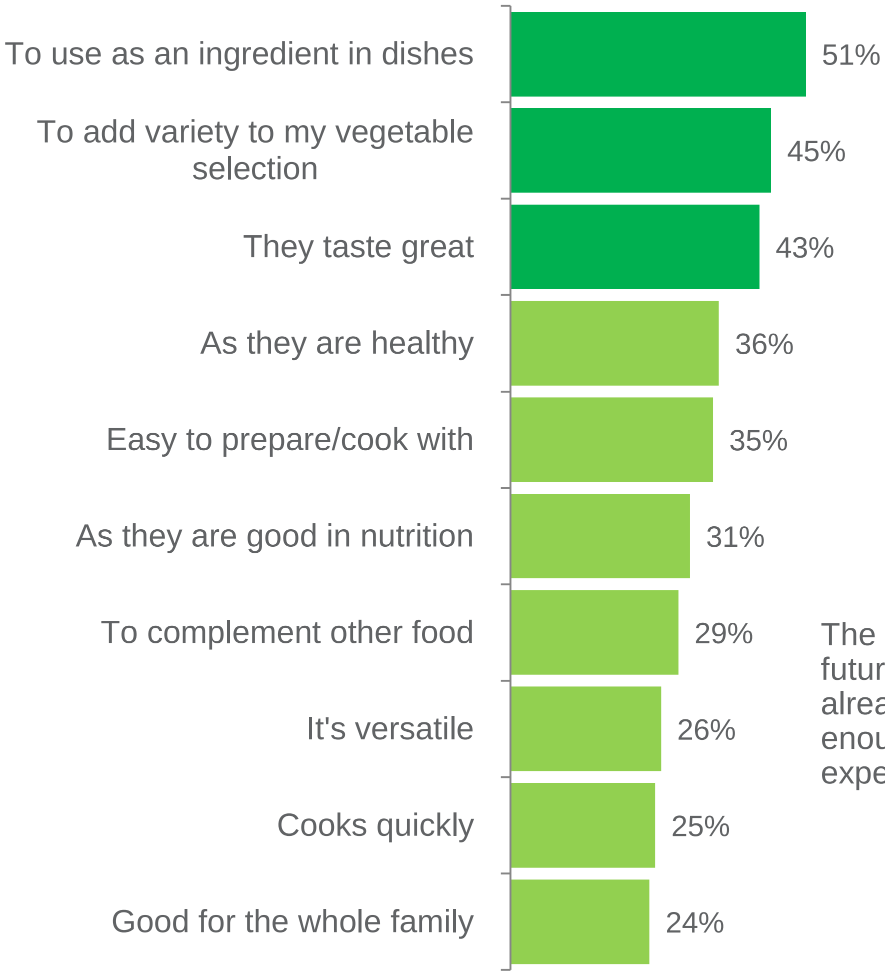
- There is very low awareness of eggplant varieties, with over two thirds of consumers unable to recall any type.
- A small number of consumers recall colour, rather than the eggplant commodity name.




Q6a. What types/varieties of <commodity> are you aware of? (unprompted)
Sample Wave 15, N=306

# Triggers and Barriers to Purchase

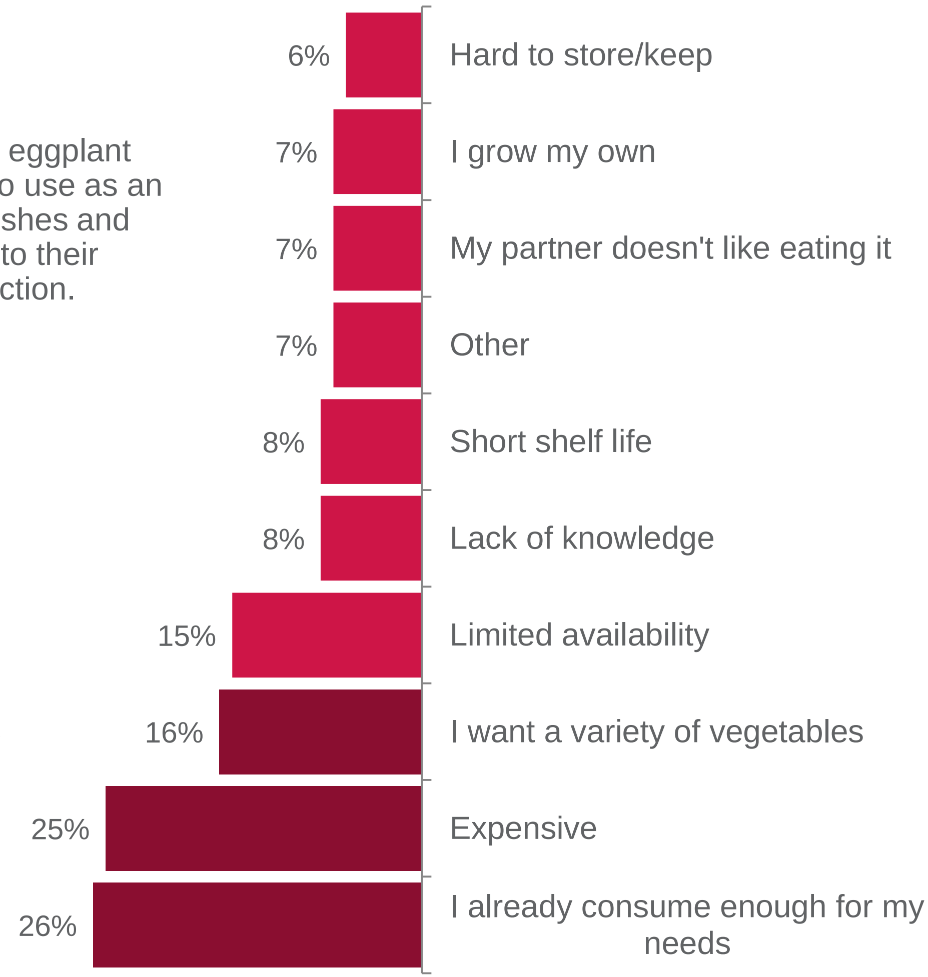
## Triggers




Key triggers to eggplant purchase are to use as an ingredient in dishes and ingredient in dishes and adding variety to their vegetable selection.

The main barriers to future purchase is already consuming enough eggplant and expense.

## Barriers




Sample Wave 15, N=306
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?

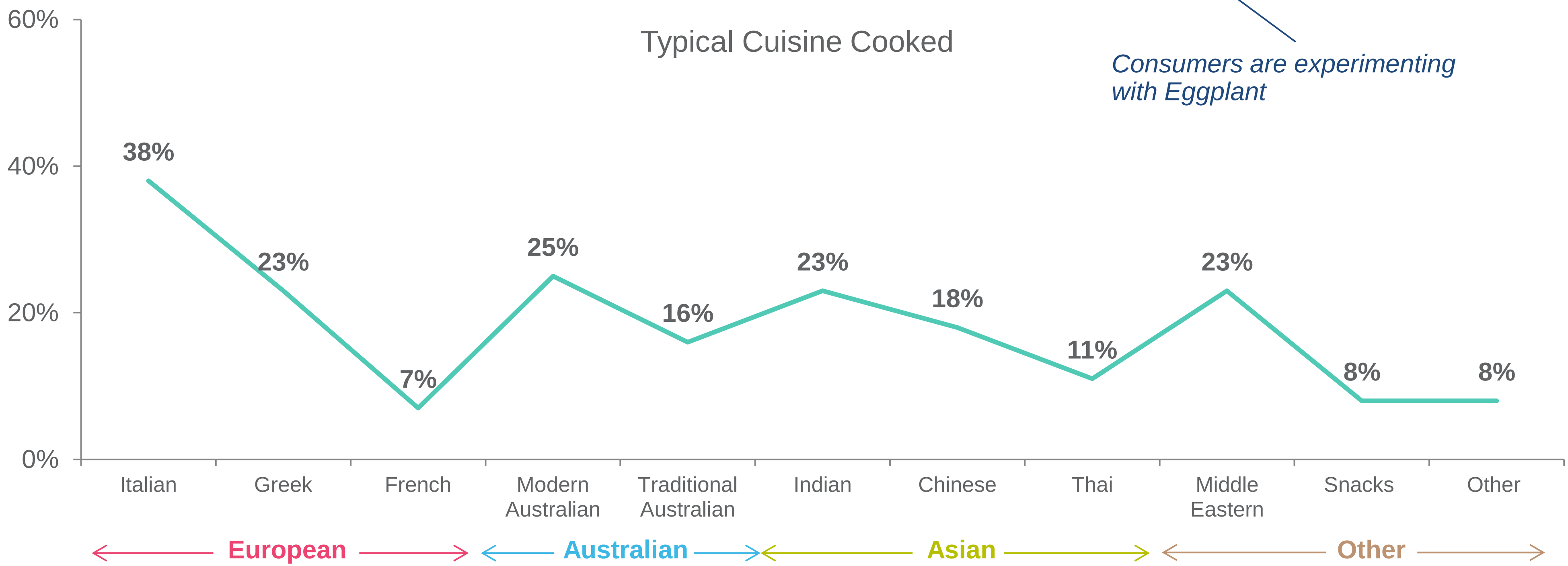
# Cooking Cuisines and Occasions

- ⇛ Eggplant is typically used in Italian and modern Australian cuisine.
- ⇛ Weekday dinners and family meals are the main consumption occasions.

## Wave 15 Top 5 Consumption Occasions

| | |
|---|---|
| Weekday Dinner | 49% |
| Family meals | 35% |
| Weekend Dinner | 32% |
| Everyday | 20% |
| New recipes | 19% |

*Consumers are experimenting with Eggplant*

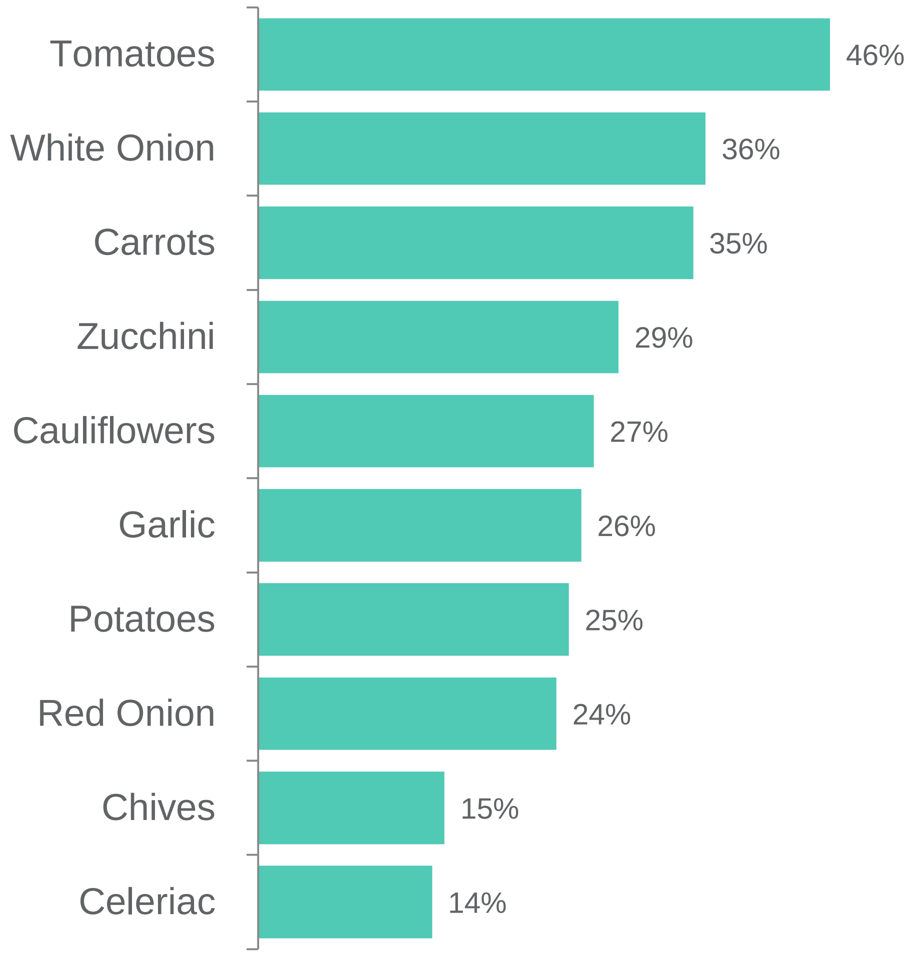



Sample Wave 15 N=306
Q10. What cuisines do you cook/consume that use <commodity> ?
Q11. Which of the following occasions do you typically consume/use <commodity> ?

# Cooking Preferences



Top 10 Accompanying Vegetables



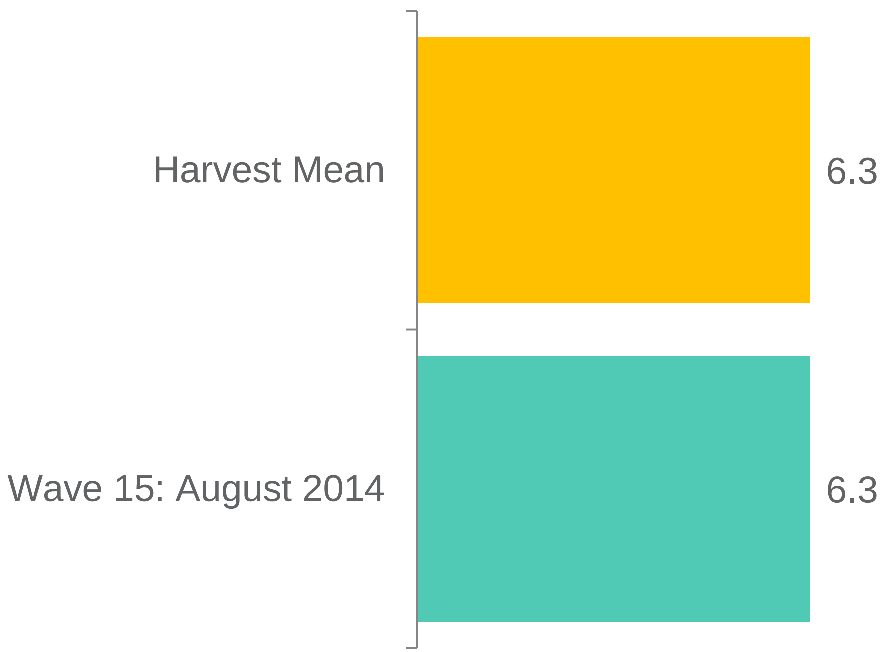

- Eggplant is generally served with tomatoes, onion and carrots.
- Consumers prefer to grill, roast, stir fry and bake eggplant.

| Top 10 Cooking Styles | |
|---|---|
| | Wave 15 |
| Grilling | 38% |
| Roasting | 33% |
| Stir frying | 32% |
| Baking | 32% |
| Shallow Frying | 29% |
| Stewing | 23% |
| Sautéing | 20% |
| Deep Frying | 11% |
| Steaming | 8% |
| Puree | 7% |

Sample Wave 15, N=306
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 important to consumers, and in line with Harvest mean for all vegetables tracked thus far.

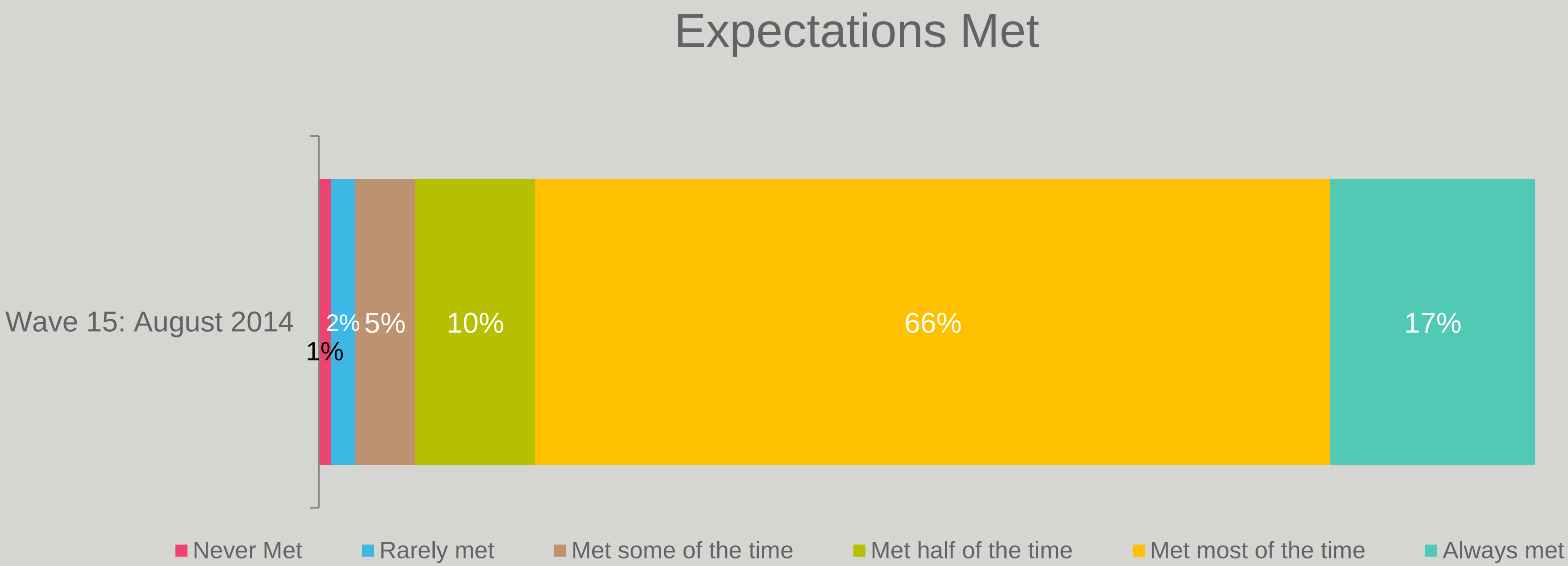



Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 15, N=306

# Freshness and Longevity

Expected to stay fresh for **7.8** days

- Consumers expect eggplant to remain fresh for one week once purchased.
- Two thirds of consumers indicated that freshness expectations are met most of the time.




Sample Wave 15, N=306
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> ?

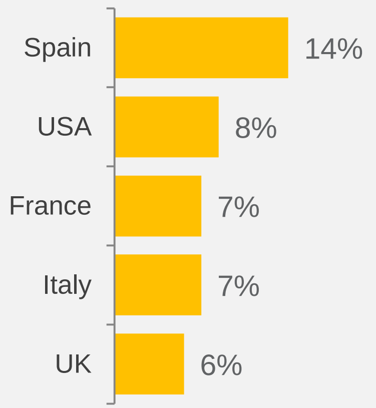
# Trends: Eggplant

# Eggplant Global NPDs

## June – August 2014

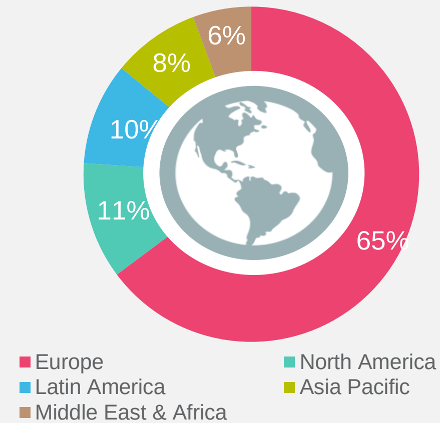
There were 71 products that contained Eggplant as an ingredient launched globally over the last three months. The majority of those launches occurred in Europe, particularly in Spain. Products ranged from meals, spreads, fruit & vegetables and sauces.

### Country

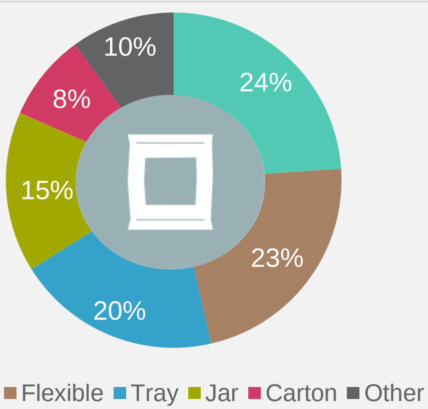



71 Global Launches

### Region




### Top Pack Formats




### Categories

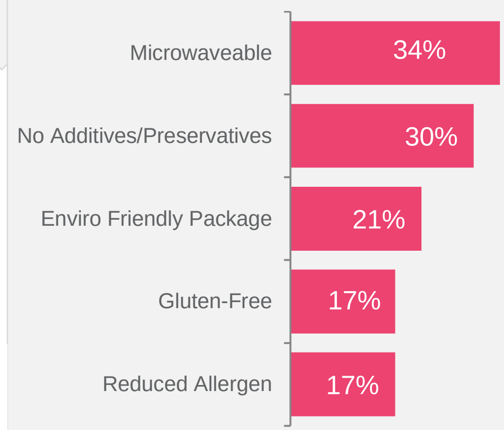
Meals 35%

Savoury Spreads 17%

Fruit & Vegetables 13%

Sauces & Seasonings 13%

### Top Claims



# Eggplant Product Launches:
## Last 3 Months (June – August 2014)

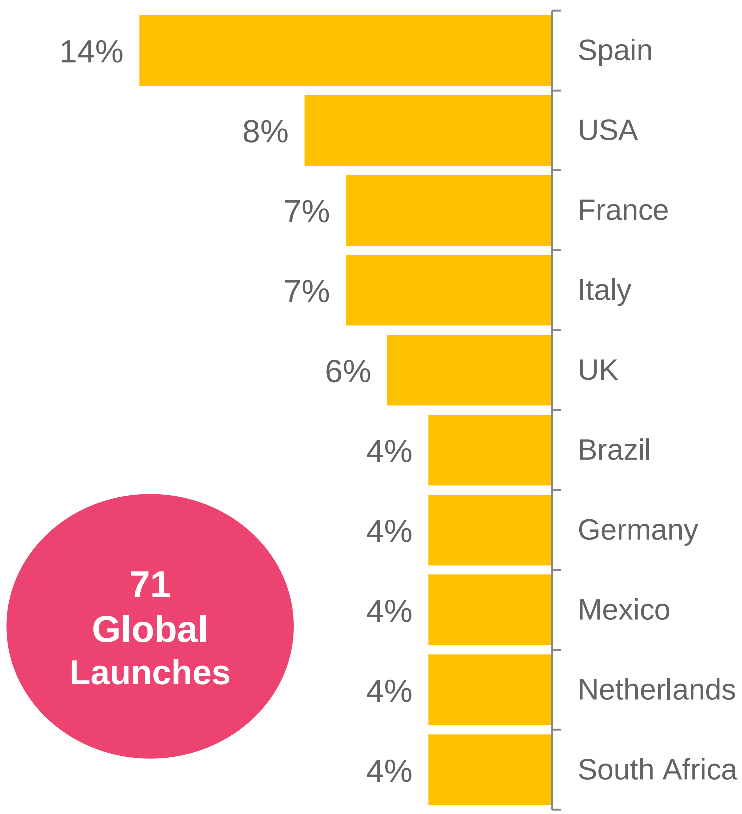
- There were 71 Eggplant products launched globally in the last three months.
- There was only one product launched in Australia, a hommus dip.
- The majority of eggplant launches occurred in Europe (65%), followed by North America (11%) and Latin America (10%).
- Categories for launches were meals (35%), savoury spreads (17%) and fruit and vegetables (13%).
- Key claims used on products were around convenience, being microwavable (34%), and health (no additives 30%, gluten free 17% and reduced allergens 17%).
- A variety of packaging formats were used including tubs (24%), flexible formats (23%) and trays (20%).
- The most innovative products launched were a hydrating moisturizer in South Korea and aubergine caviar launched in France (examples of which can be found in the following pages).

Source: Mintel (2014)

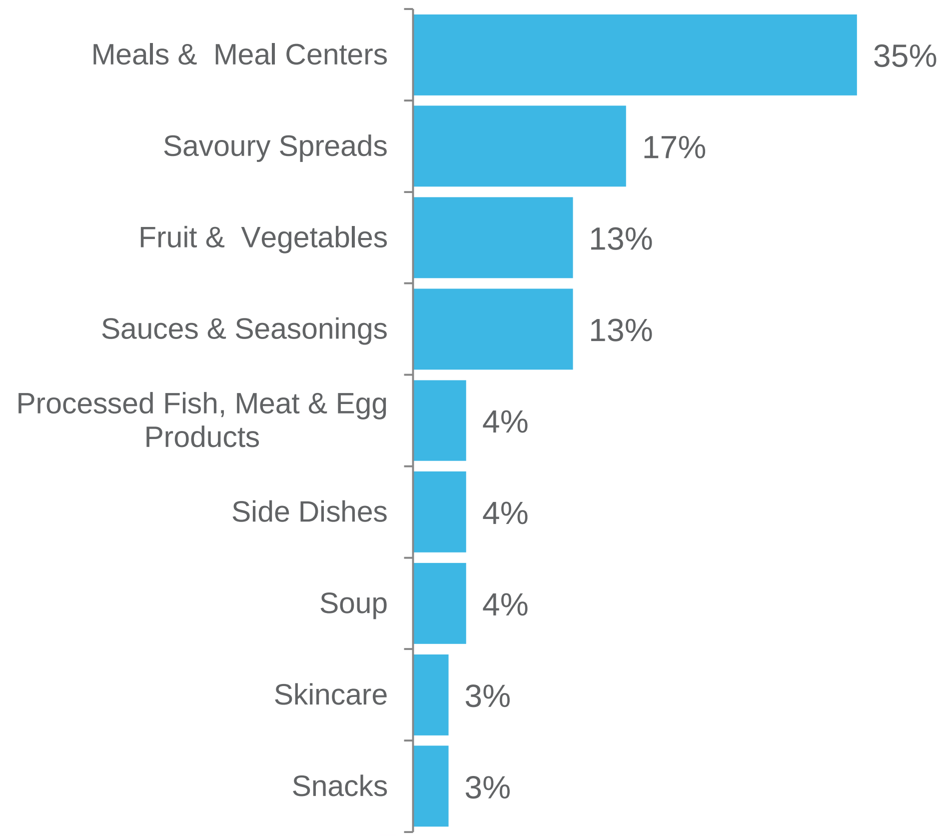
# Eggplant Launches

- The key country for eggplant launches was Spain. USA, France and Italy also had a large number of launches.
- The majority of products launched over the last three months were meals. Savoury spread, fruit & vegetable products were also common.

## Top Launch Countries

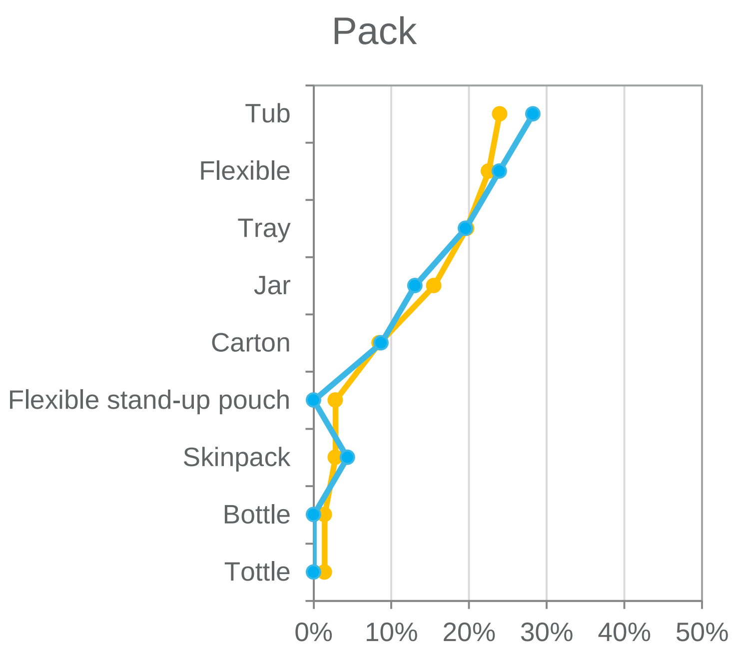


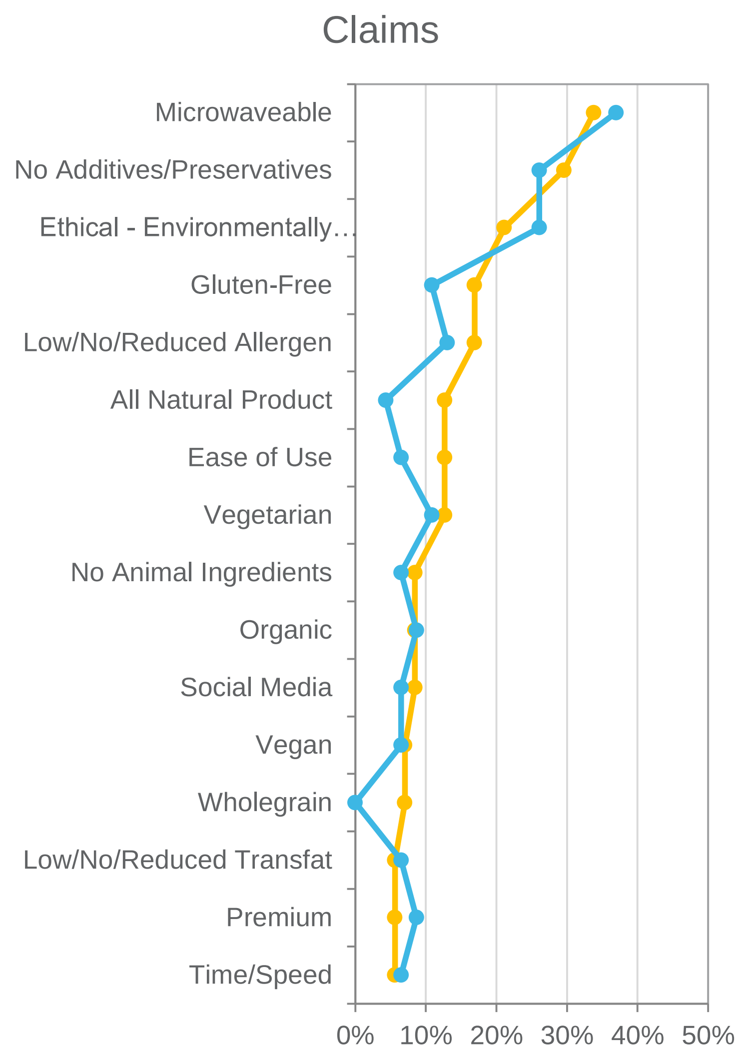

## Top Launch Categories



# Claims & Pack Formats

- The main packaging formats used for eggplant products were tubs and flexible packs.
- Key claims were microwavable, no additives and environmentally friendly packaging.




Global (N=71) Europe (N=46)

Number of Global NPD for the L3M N=71
Only regions with n >30 are displayed

# Innovative Eggplant Launches:
## L3M (June - August 2014)

### L'Epicerie Provençale Aubergine Caviar (France)

L'Epicerie Provençale Caviar d'Aubergine (Aubergine Caviar) is best served with toast as an appetizer or with salads, avocado, scrambled eggs, fish, pasta and raw vegetables. The product retails in a 90g jar.


**Claims:**
No information available

### Nestlé NaturNes Collection Printemps-Été Aubergine Purée (France)

Nestlé NaturNes Collection Printemps-Été Purée d'Aubergines (Aubergine Purée) is a limited edition, spring-summertime recipe made with 100% natural origin, steam cooked ingredients. This microwaveable product features a ground texture, contains no added salt and is suitable for babies from six months of age.


**Claims:**
Seasonal, All Natural Product, Ethical - Environmentally Friendly Package, Microwaveable, Convenient Packaging, Low/No/Reduced Sodium, Babies & Toddlers (0-4), Limited Edition

### VDL Beauty with Prune Oil Ultra Hydrating Moisturizer (South Korea)

VDL Beauty with Prune Oil Ultra Hydrating Moisturizer EX is an all-day, soft-textured daily hydrator that offers continuous moisture replenishment throughout the day. It is said to leave the skin smooth and healthy-looking and is enriched with virgin prune oil and water, rich in unsaturated fatty acid to reinforce the skin barrier.


**Claims:**
Mineral Oil/Petroleum Free, Cleansing*, Botanical/Herbal, No Animal Ingredients, Antioxidant, Long-Lasting*, Moisturising / Hydrating

### Nonna Lina Aubergine Gratin (Italy)

Nonna Lina Melanzane Gratinate (Aubergine Gratin) has been relaunched and was previously under the Le Verdure della Nonna brand. The preservative-free product is prepared with extra virgin olive oil and can be microwaved in one minute. It is available in a 250g pack which serves two and features the Casa Regillo logo


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

Source: Mintel (2014)

# Innovative Eggplant Launches:
## L3M (June - August 2014)

### Spar Veggie Vegan Bio-Bruschetta Spread with Eggplant (Czech Republic)

Spar Veggie Veganská Bio Bruschetta (Vegan Bio-Bruschetta Spread with Eggplant) is now available. This organic product is suitable for vegans, is free from GMO ingredients, and retails in a 125g pack.


**Claims:**
Organic, Vegan, No Animal Ingredients, GMO-Free

### La Huerta Grilled Vegetables with Butter and Chipotle (Mexico)

La Huerta Parrillada de Vegetales a la Mantequilla con Chipotle (Grilled Vegetables with Butter and Chipotle) comprise pumpkin, onion, red pepper, eggplant, mushroom and asparagus, are ready in minutes, and only require heating before serving.


**Claims:**
Ease of Use, No Additives/Preservatives, Social Media, Time/Speed, Convenient Packaging

### All Light Gourmet Eggplant Lasagna with Napolitano Sauce (Brazil)

All Light Lasanha de Berinjela ao Molho Napolitano (Eggplant Lasagna with Napolitano Sauce) is free from gluten, microwaveable and ready-to-eat. The product is suitable for vegetarians and retails in a 300g pack.


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

### Strauss Symphonia 25% Cream Cheese with Antipasti (Israel)

Strauss Symphonia 25% Cream Cheese with Antipasti is formulated with grilled vegetables. This kosher certified product retails in a 210g pack.


**Claims:**
Kosher

Source: Mintel (2013)

# Innovative Eggplant Launches:
## L3M (June - August 2014)

### The Mediterranean Kitchen Aubergine Dip (South Africa)

The Mediterranean Kitchen Aubergine Dip is available. The product retails in a 250ml tub.


**Claims:**
Low/No/Reduced Fat

### Rosina Celentano Eggplant Parmigiana with Sauce (South Korea)

Rosina Celentano Eggplant Parmigiana with Sauce has been relaunched. This all natural, easy to prepare, microwaveable product is free of preservatives and trans fat. It retails in a newly designed 14-oz. pack.


**Claims:**
Ease of Use, No Additives/Preservatives, All Natural Product, Low/No/Reduced Transfat, Microwaveable

### Kühlmann Fresh Cup TexMex Salad (Germany)

Kühlmann Fresh Cup Texmex Salat (TexMex Salad) is now available. It comprises a pasta salad with beef meat and kidney beans and chili flavoured tortilla chips. The product retails in a cup containing 230g of salad, 10g of tortilla chips and a fork.


**Claims:**
N/A

### Fynbos Fine Foods Aubergine Pesto (South Africa)

Fynbos Fine Foods Aubergine Pesto is now available. The kosher certified product retails in a 125ml pack.


**Claims:**
Kosher

Source: Mintel (2014)

# Australian Launch:
## L3M (June - August 2014)

### The Olive Branch Heavenly Hommus Dip &/Or Spread

The Olive Branch Heavenly Hommus Dip &/Or Spread is free from gluten and dairy. This product retails in a 250g pack.


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

# Zucchini.

# Purchase and Consumption Behaviour



Average Purchase **3.4** times per month

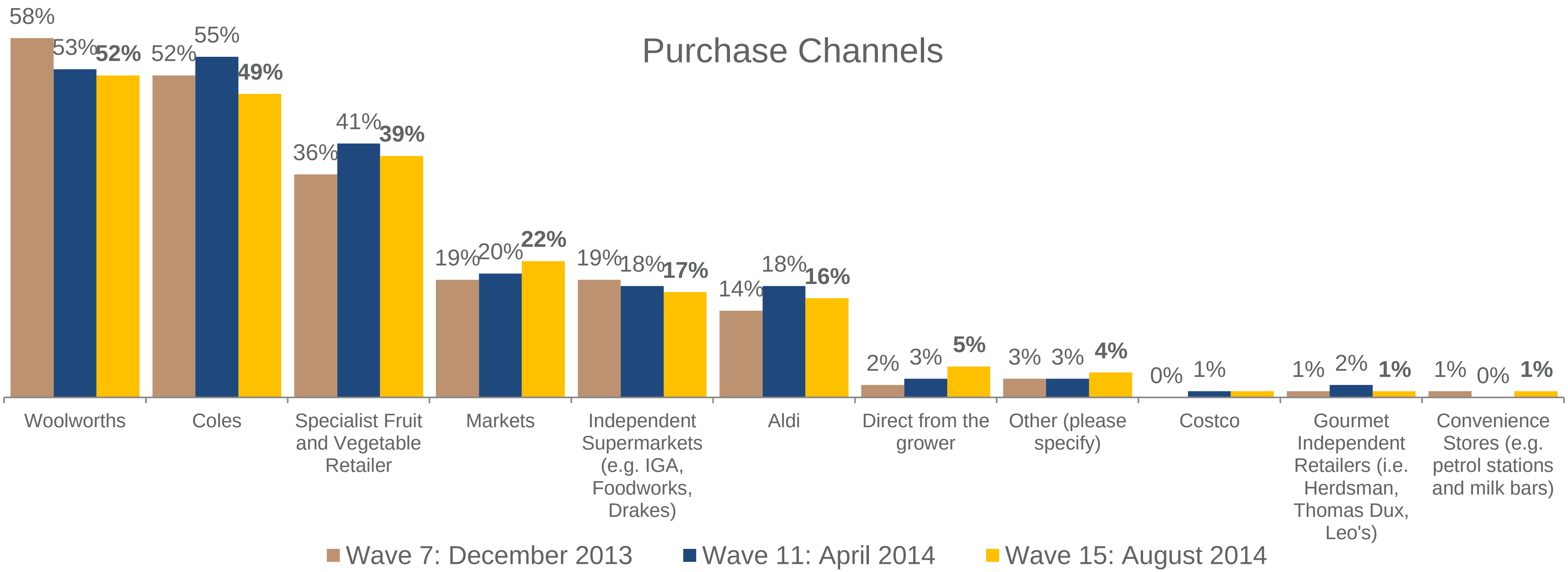
- 3.4 times, Wave 7
- ▼ 3.2 times, Wave 11

Average Consumption **7.1** times per month

- ▼ 6.8 times, Wave 7
- ▼ 6.4 times, Wave 11

⇛ Purchase frequency has remained relatively stable in Wave 15, while consumption frequency has increased from Wave 11.

⇛ Buying behaviour was consistent across three waves, with Coles and Woolworths the main purchase locations. A considerable number of consumers also purchase from specialist retailers.




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 3 N=502, Wave 7, N=329, Wave 11 N=302, Wave 15 N=335

HAL Horticulture Australia

colmar brunton.

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

# Average Spend and Price Sensitivity



**Average weight of purchase**

The average consumer typically purchased **700g** of Zucchini per shop. This was consistent with previous months.

- ▼ 600g, Wave 7
- — 700g, Wave 11

**Recalled last spend**

The average recalled last spend was **$3.20**, which represents a considerable increase from previous waves.

- ▼ $2.70, Wave 7
- ▼ $2.80, Wave 11

**Value for money**

On average, consumers perceived Zucchini to be good value for money **(6.2/10)**, which was comparable to previous waves.

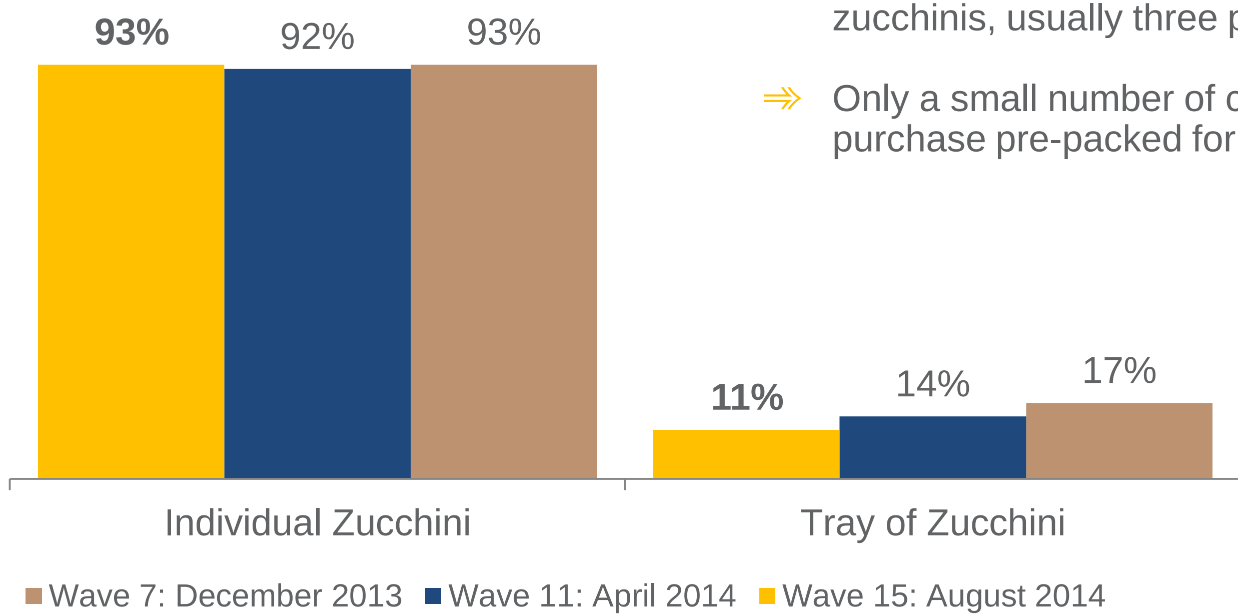
- ▼ 6.0/10, Wave 7
- — 6.2/10, Wave 11

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 3 N=502, Wave 7, N=329, Wave 11 N=302, Wave 15 N=335



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

# Pack Formats Purchased



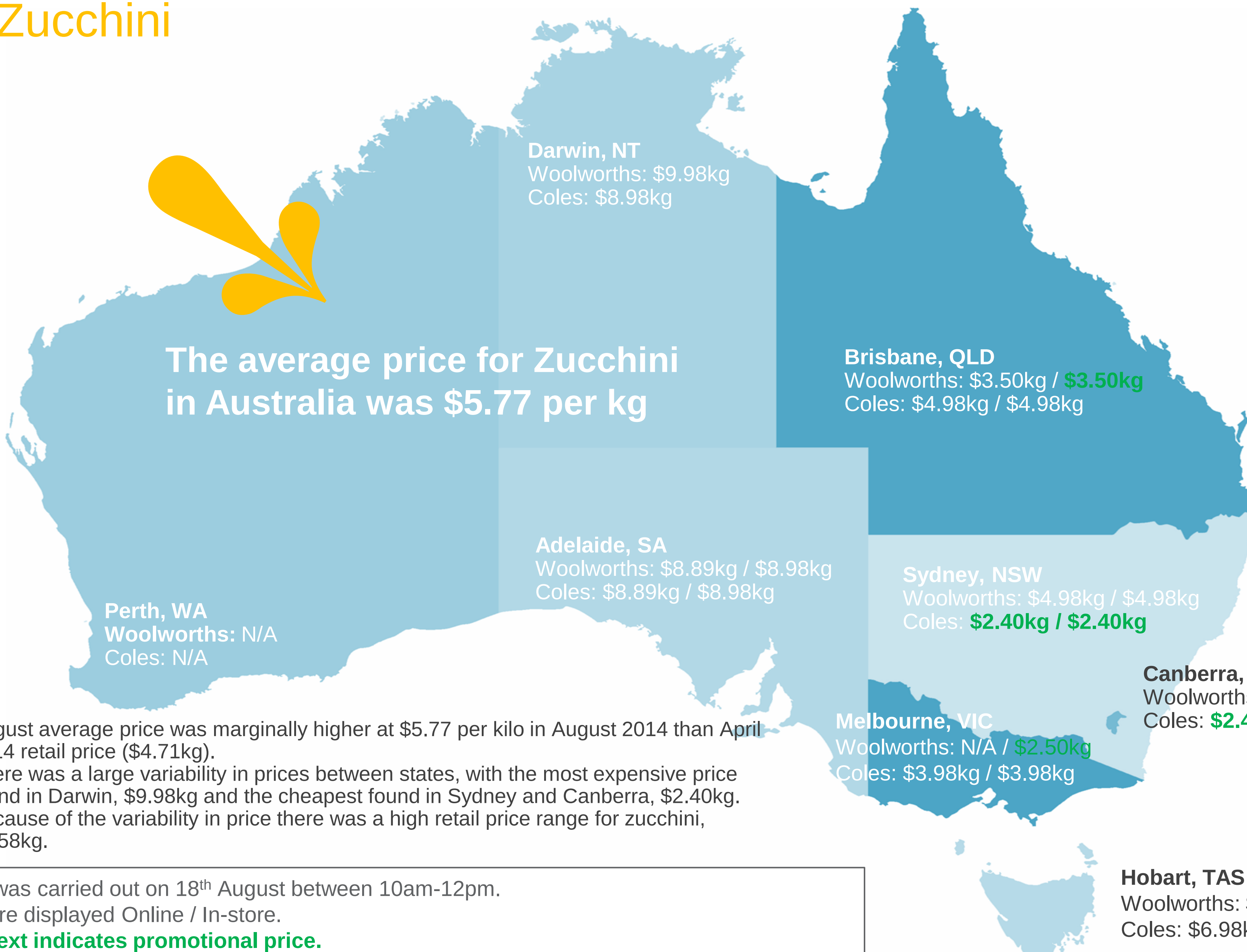

- Consumers prefer to purchase individual zucchinis, usually three per shop.
- Only a small number of consumers opt to purchase pre-packed formats of zucchini.

| | Individual | Tray |
|---|---|---|
| Wave 7 | 2.9 | 1.9 |
| Wave 11 | 3.0 | 1.9 |
| Wave 15 | 3.2 | 2.1 |

Q3a. How much <commodity> does this typically equate to?
Sample Wave 3 N=502, Wave 7, N=329, Wave 11 N=302, Wave 15 N=335

# Online and In-store Commodity Prices

## Zucchini

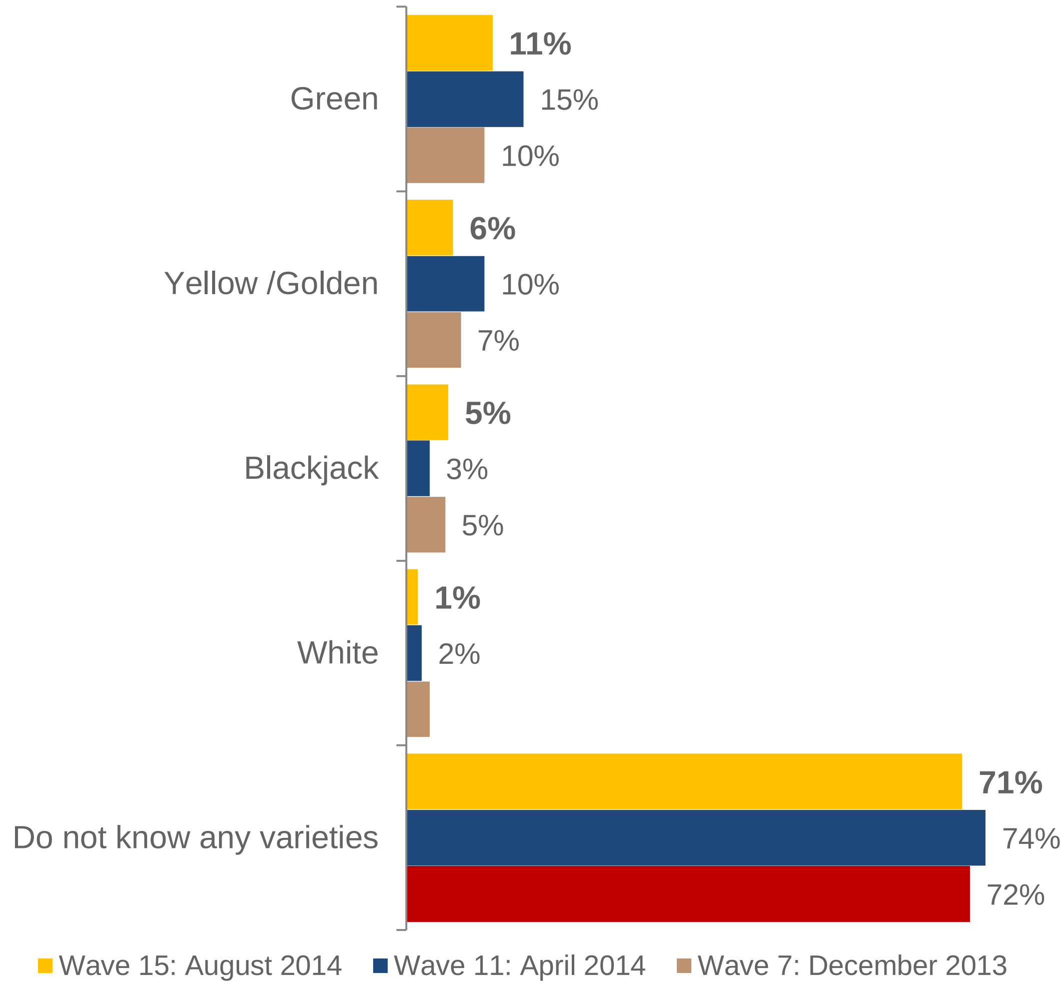



- August average price was marginally higher at $5.77 per kilo in August 2014 than April 2014 retail price ($4.71kg).
- There was a large variability in prices between states, with the most expensive price found in Darwin, $9.98kg and the cheapest found in Sydney and Canberra, $2.40kg.
- Because of the variability in price there was a high retail price range for zucchini, $7.58kg.

Pricing was carried out on 18th August between 10am-12pm.
Prices are displayed Online / In-store.
**Green text indicates promotional price.**

# Spontaneous Awareness

- Overall, awareness of zucchinis remained very low.
- Consumers who recalled types of zucchinis did so mainly by colour, with green the highest awareness consistently across waves.

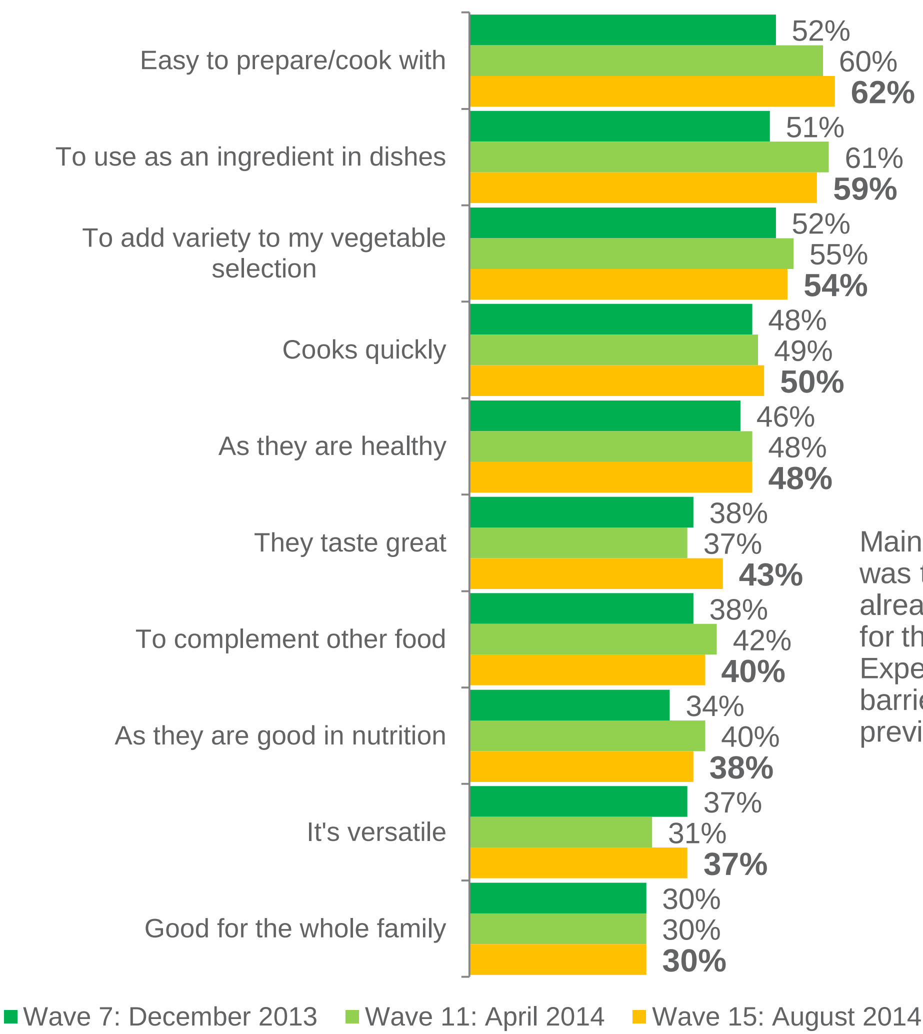



Sample Wave 3 N=502, Wave 7, N=329, Wave 11 N=302, Wave 15 N=335
Q6a. What varieties of <commodity> are you aware of? (unprompted)

HAL Horticulture Australia
colmar brunton.

# Triggers & Barriers to Purchase

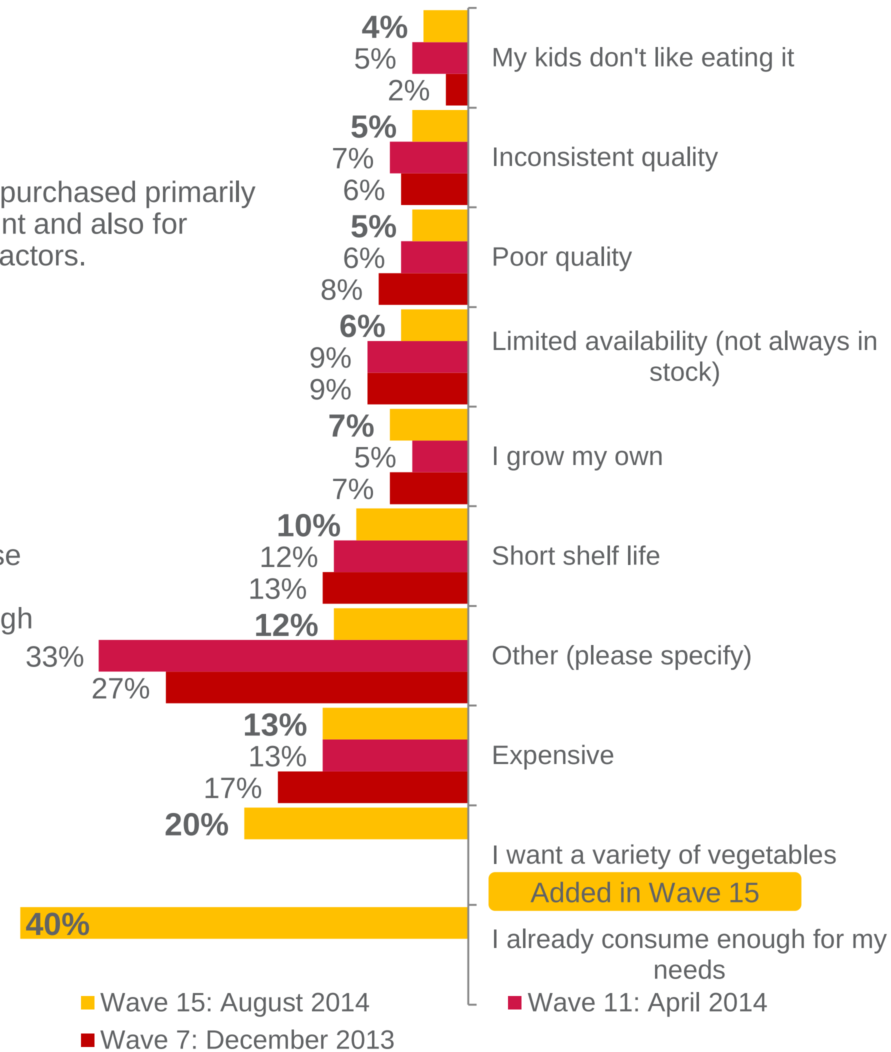
## Triggers




Zucchinis are purchased primarily as an ingredient and also for convenience factors.

Main barrier to purchase was that consumers already consume enough for their needs
Expense was less of barrier compared with previous waves.

## Barriers




Sample Wave 3 N=502, Wave 7, N=329, Wave 11 N=302, Wave 15 N=335
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?

HAL Horticulture Australia
colmar brunton.

# Cooking Cuisine & Occasions



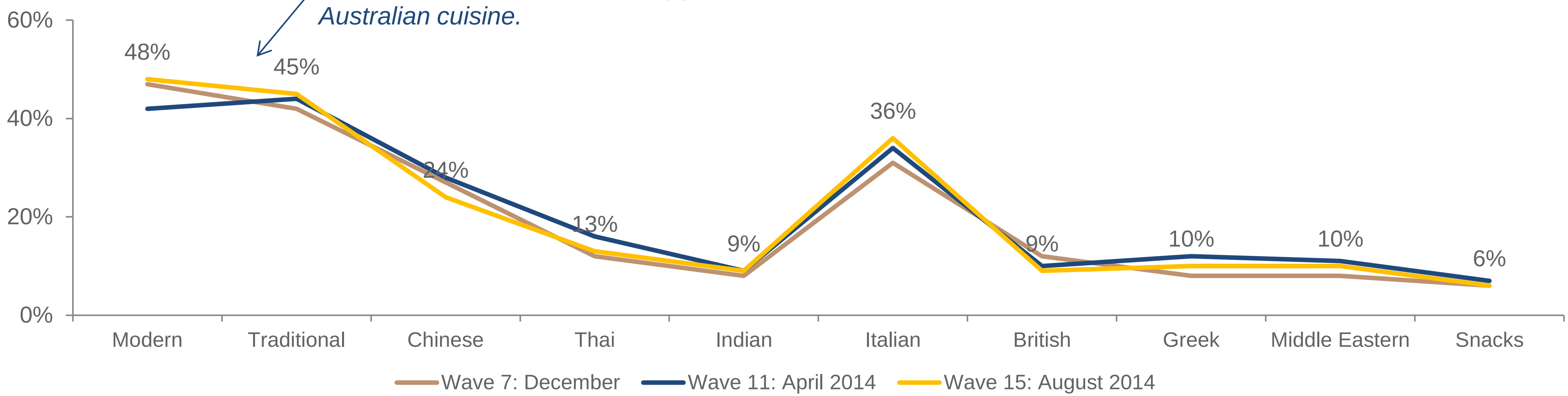
- Consumers preferred to cook zucchinis in Australian and Italian cuisine.
- Cuisine repertoire was consistent across waves.
- The main consumption occasion of zucchinis were weekday dinners.

## Wave 11 Top 5 Consumption Occasions

| | Wave 15 | Wave 11 | Wave 7 |
|---|---|---|---|
| Weekday Dinner | **58%** | ▼ | ▼ |
| Weekend Dinner | **41%** | ▼ | ▼ |
| Family meals | **38%** | ▲ | ▼ |
| Every-day | **32%** | ▼ | ▼ |
| Quick Meals | **28%** | ▲ | ▲ |

*Shift towards traditional, away from modern Australian cuisine.*

## Typical Cuisine Cooked



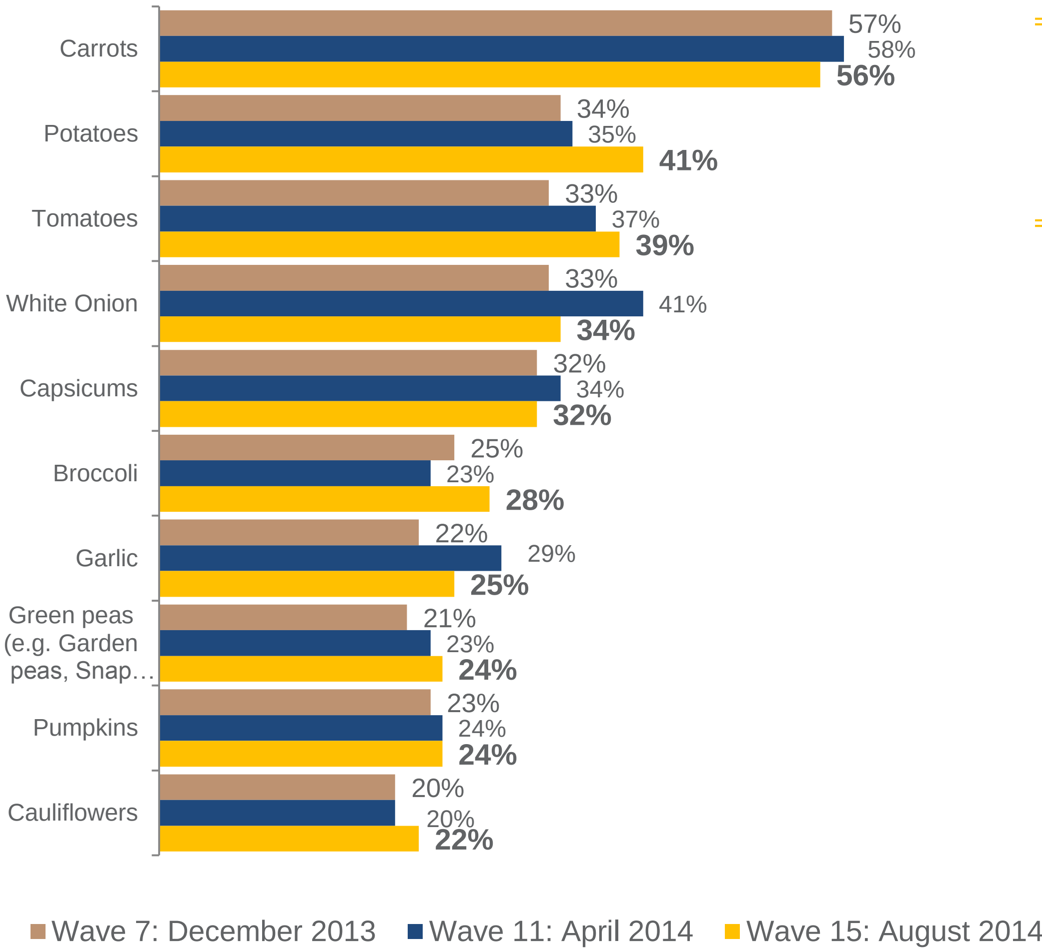

Australian — Asian — European — Other

Sample Wave 3 N=502, Wave 7, N=329, Wave 11 N=302, Wave 15 N=335
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




- Consumption of zucchini with carrots remained consistent, while we see an increase in consumption with Potatoes and Tomatoes in Wave 15.
- Stir-frying was the main cooking technique used. Steaming remained high, while we see a reduction in soups.

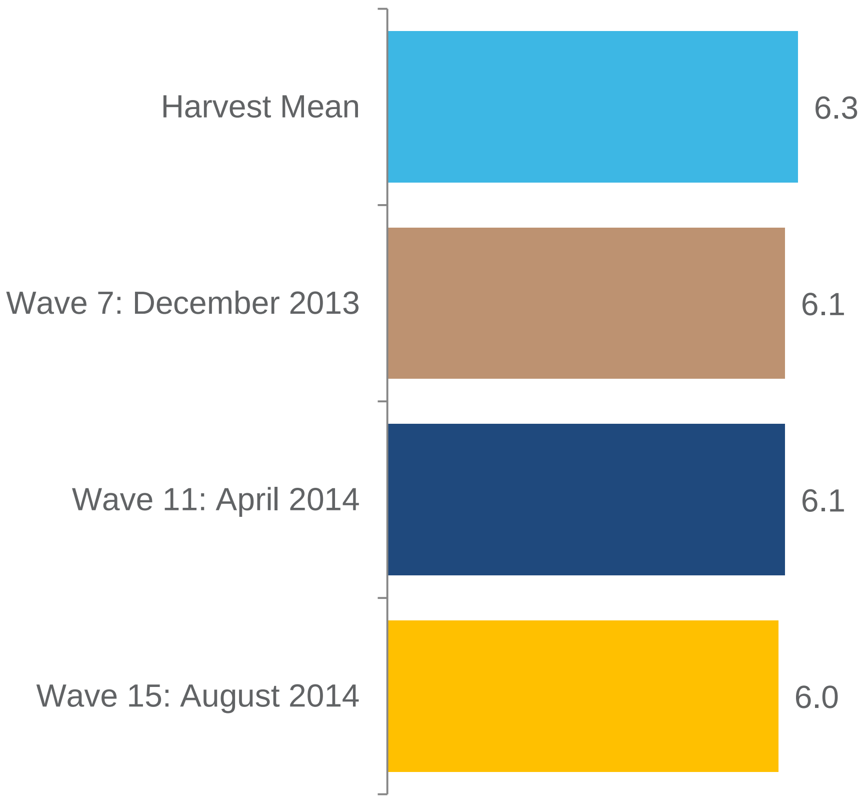
**Top 10 Cooking Styles**

| | Wave 7 | Wave 11 | Wave 15 |
|---|---|---|---|
| Stir frying | 51% | 55% | 51% |
| Steaming | 33% | 38% | 35% |
| Baking | 24% | 26% | 30% |
| Soup | 24% | 30% | 23% |
| Roasting | 23% | 25% | 22% |
| Sautéing | 22% | 25% | 21% |
| Grilling | 18% | 16% | 19% |
| Stewing (slowcooking) | 15% | 19% | 19% |
| Shallow Frying | 12% | 12% | 17% |
| Boiling | 18% | 12% | 16% |

Sample Wave 3 N=502, Wave 7, N=329, Wave 11 N=302, Wave 15 N=335
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 deemed to be fairly important to consumers and has remained consistent across the last 3 waves. However, this is somewhat lower than other commodities tracked thus far.

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Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 3 N=502, Wave 7, N=329, Wave 11 N=302, Wave 15 N=335

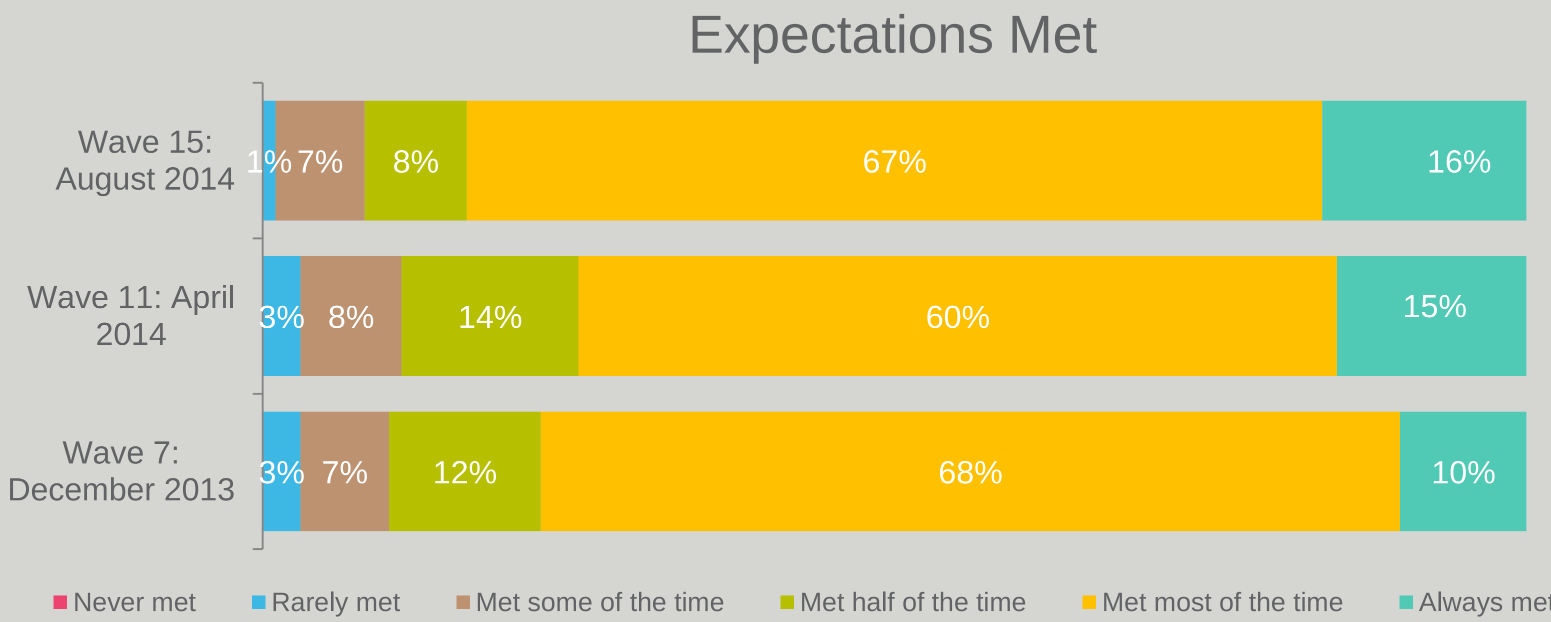
# Freshness and Longevity

Expected to stay fresh for **8.1** days

▼ 7.9 days, Wave 7

▲ 8.2 days, Wave 11

- Consumers expected zucchini to remain fresh for just over eight days, which is a slight increase from Wave 7.
- Additionally, there was a slight increase in freshness expectations being met, with 83% stating their expectations were met most of the time or always met.




Sample Wave 3 N=502, Wave 7, N=329, Wave 11 N=302, Wave 15 N=335
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> ?

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colmar brunton.

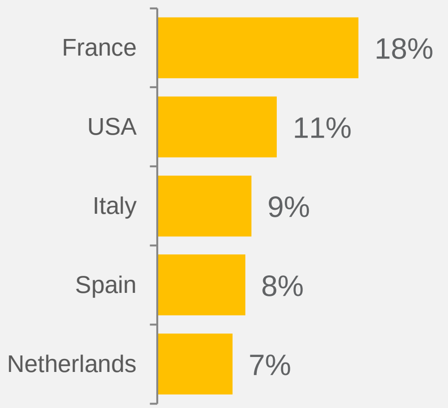
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

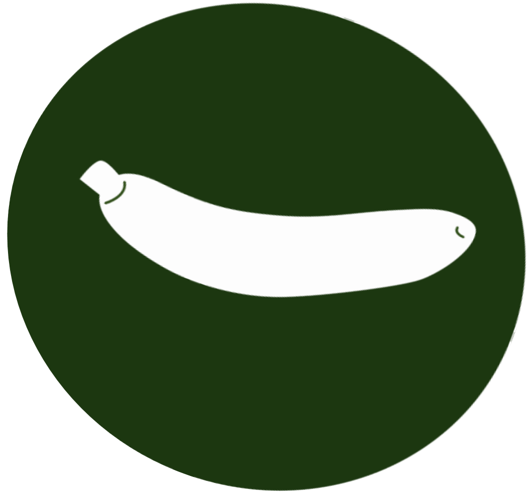
# Trends: Zucchini

# Zucchini Global NPDs
## June – August 2014

There were 173 zucchini products launched in the last three months. The majority of launches occurred in Europe, and specifically France. Key categories for launches were meals, fruit & vegetables and soup.

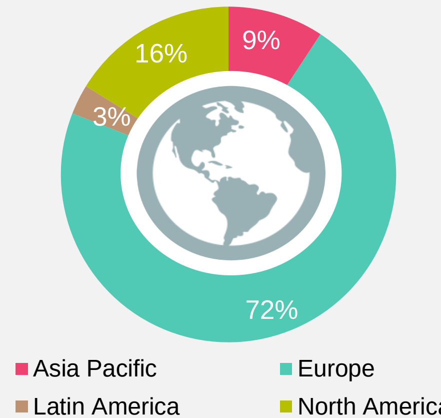
### Country



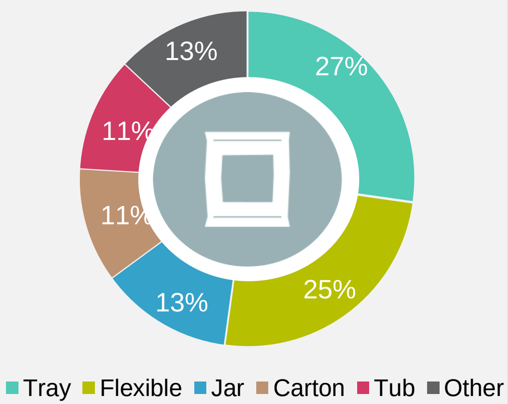



173 Global Launches

### Region




### Top Pack Formats




### Categories

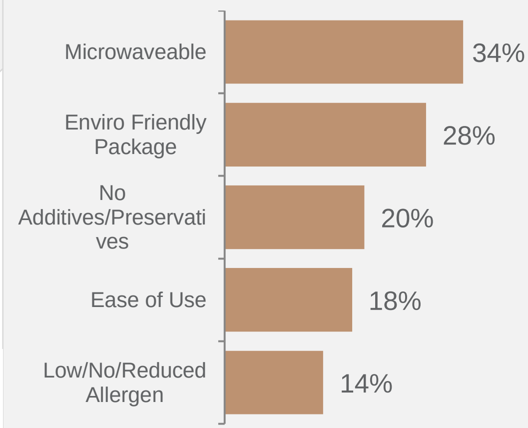
Meals 38%

Fruit & Vegetables 18%

Soup 13%

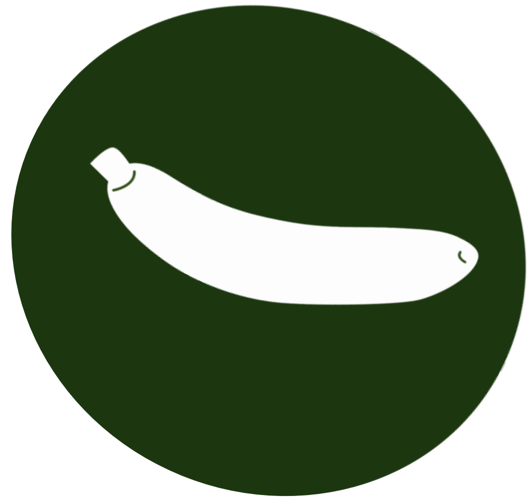
Sauces & Seasonings 11%

### Top Claims



# Zucchini Product Launches:
## Last 3 Months (June – August 2014)
## Summary

- There were 173 products launched globally in the last three months. This was somewhat higher than previous trends.
- Domestically, there were only 2 products launched that contained zucchini as an ingredient.
- Launches predominantly occurred in Europe (72%) and some in North America (16%).
- The most common packaging used for launches was trays (27%) and flexible formats(25%).
- Meals (38%), fruit & vegetables (18%) and soup (13%) were the main categories for launches.
- Microwavable (34%) remained the most common claim used for products. Environmentally friendly packaging (28%) and no additives/preservatives (20%) were also frequently used.
- The most innovative products launched were zucchini cream and vegetable bagels (examples of these can be found in the following pages).

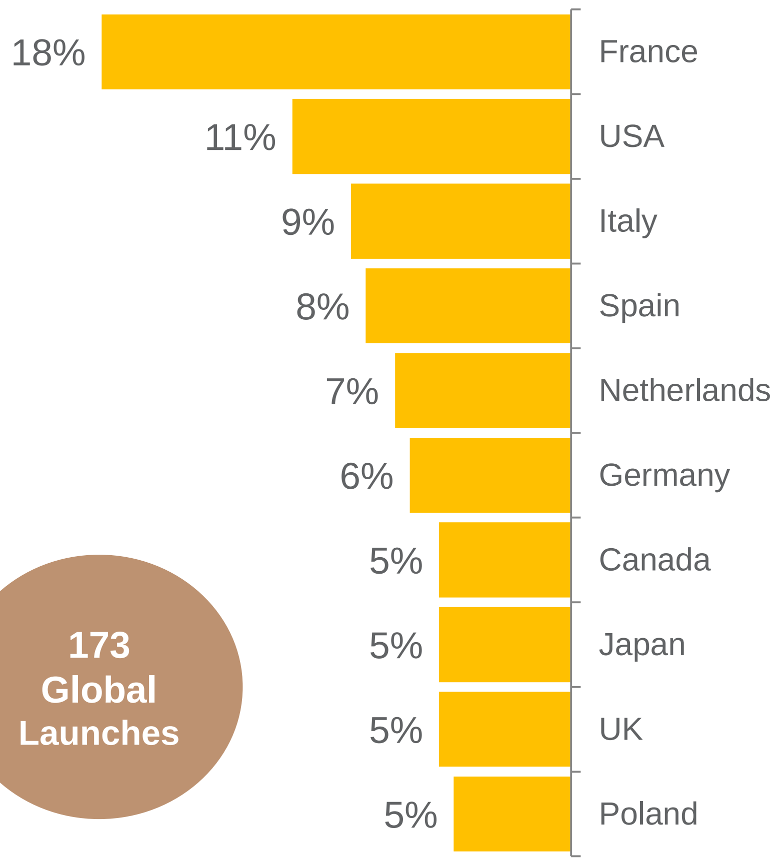


Source: Mintel (2014)

# Zucchini Launches

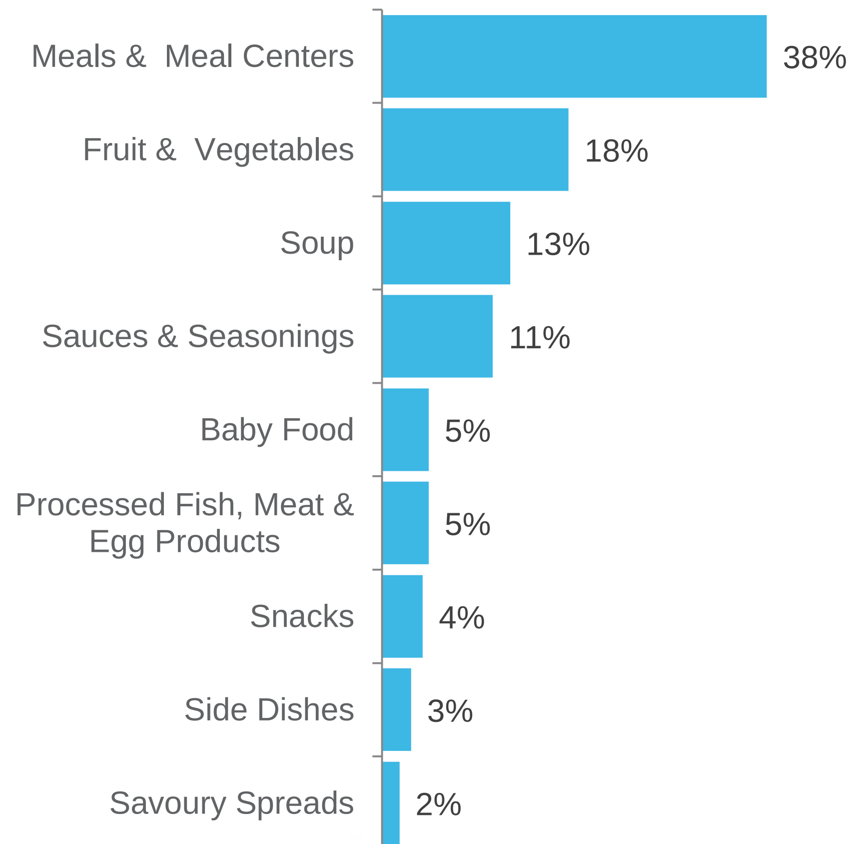
- France was the key country for launches over the last three months. USA and Italy also had a number of product launches.
- Top categories for products were meals, fruit & vegetables and soup.

## Top Launch Countries




**173 Global Launches**

## Top Launch Categories

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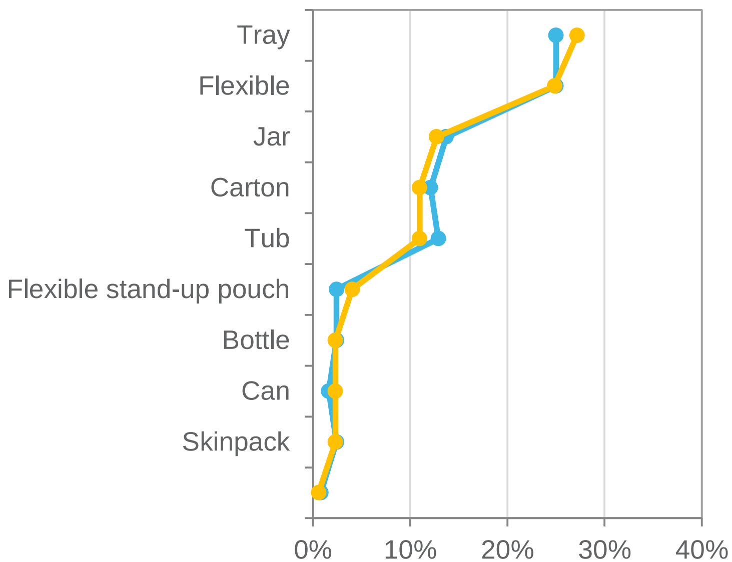
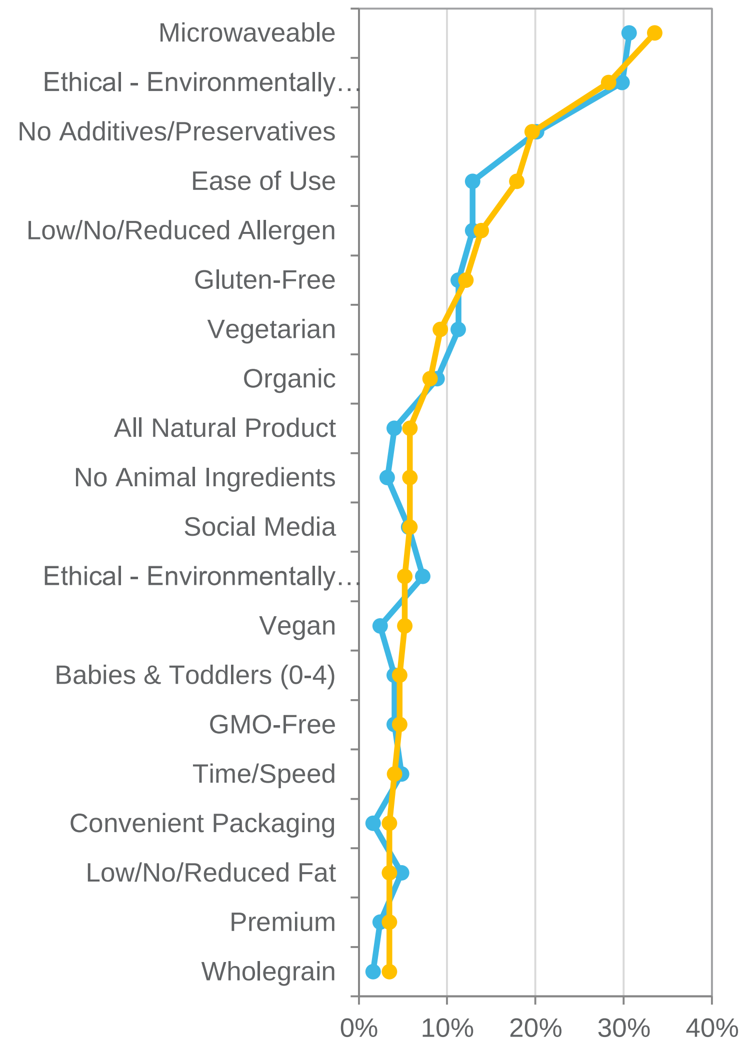
# Zucchini Launches

- Trays and flexible packaging were the most common format used for zucchini products.
- On trend with previous data, microwavable was the most common claim made. Environmentally friendly packaging was also used frequently.

Top Pack Formats Launched




Top Claims Launched




Europe (N=124) Global (N=173)

Only regions with n >30 are displayed

# Innovative Zucchini Launches:

## L3M (June - August 2014)



### Dempster's Bakery Garden Vegetable Bagels (Canada)

Dempster's Bakery Garden Vegetable Bagels is a limited edition bagel containing a half serving of vegetables in each bagel, including carrots and zucchini. The product retails in a 450g pack containing six bagels.


**Claims:**
Limited Edition

### Nippon Ham Bistromilanese Bacon & Zucchini Paella (Japan)

Nippon Ham Bistromilanese Bacon & Zucchini Paella features domestically-grown rice seasoned with saffron, and paprika, zucchini and homemade bacon. It retails in a microwaveable 230g pack. Launched on June 1, 2014 with an RRP of 410 yen.


**Claims:**
Microwaveable

### Tartex Cremisso Vegetarian Sunflower Seeds Spread with Courgette & Curry (Netherlands)

Tartex Cremisso Vegetarische Zonnenbloempitten Spread met Courgette & Curry (Vegetarian Sunflower Seeds Spread with Courgette & Curry) is an organic product, which is lactose-free and made without egg or yeast. It is suitable for vegans and retails 180g pack.


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

### Salses Fruits, S&P Zucchini Cream (Spain)

Salses Fruits, S&P Crema de Carbassó (Zucchini Cream) has been made with selected natural ingredients and following a traditional recipe. This handmade cream retails in a 750ml pack that features the Km 0 logo for locally sourced products.


**Claims:**
No information available

Source: Mintel (2014)

# Innovative Zucchini Launches:
## L3M (June - August 2014)



### Wong Barbecue Vegetable Pack (Peru)

Wong Pack Parrillero (Barbecue Vegetable Pack) is now available. The ready to cook product retails in a 700g pack.


**Claims:**
Ease of Use

### Alnatura Colourful Vegetables with Rice (Germany)

Alnatura Buntes Gemüse mit Reis (Colourful Vegetables with Rice) is suitable for babies from six months and comes from organic and bio-dynamic Demeter cultivation. It is free from added salt, gluten, milk ingredients, flavourings, colourings and preservatives and retails in a 190g jar.


**Claims:**
No Additives/Preservatives, Low/No/Reduced Allergen, GMO-Free, Organic, Ethical - Environmentally Friendly Product, Ease of Use, Gluten-Free, Low/No/Reduced Sodium, Babies & Toddlers (0-4)

### Beech-Nut Just Spinach, Zucchini & Peas Baby Food (USA)

Beech-Nut Just Spinach, Zucchini & Peas Baby Food is 100% natural and recommended for stage-two babies which is from about six months old. The microwaveable product retails in a 4.25-oz. jar.


**Claims:**
All Natural Product, Babies & Toddlers (0-4), Microwaveable

### Casa Mas Zucchini Cream Soup (Spain)

Casa Mas Crema de Calabacín (Zucchini Cream Soup) can be served cold or hot. The product retails in a 250ml pack featuring a Data Matrix code.


**Claims:**
No information available

Source: Mintel (2014)

# Innovative Zucchini Launches:

## L3M (June - August 2014)



### AH Zomer Favoriet BBQ Grill Vegetables (Netherlands)

AH Zomer Favoriet BBQ Grillgroenten (BBQ Grill Vegetables) contain paprika, courgette, chestnut mushrooms, red onion and a 25g bag of garlic oil. The product is free from gluten and milk, and retails in a 450 g pack.

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

### Herdade de Carvalhoso Alentejo Vegetable Mixture (Portugal)

Herdade de Carvalhoso Alentejo Mistura de Vegetais (Vegetable Mixture) is now available. This organic product can be added to pasta, omelets, pizzas and other dishes. It is suitable for vegetarians and vegans, and retails in a 60g sachet.

**Claims:**
Organic, Vegan, Vegetarian, No Animal Ingredients, Time/Speed

### Trader Joe's Zucchini Fries (USA)

Trader Joe's Zucchini Fries are described as a grilled and lightly battered zucchini that can be served as an appetizer. This fully-cooked product is suitable for vegans and retails in a 12-oz. pack featuring a serving suggestion.


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

### Plum Courgette, Banana & Amaranth Organic Wholegrain Blend (UK)

Plum Courgette, Banana & Amaranth Organic Wholegrain Blend is recommended for babies from four moths of age onwards. The organic certified product is a train tiny taste buds with a trio of unique flavours of apple, courgette, banana and amaranth.


**Claims:**
All Natural Product, Low/No/Reduced Allergen, GMO-Free, Gluten-Free, Organic, Vegetarian, Babies & Toddlers (0-4), Wholegrain

Source: Mintel (2014)

# Australian Zucchini Launches:
## L3M (June - August 2014)



**Coles Asian Crunchy Stir-Fry**


**Claims:**
No information available

**Latina Fresh Spicy Chicken & Chorizo with Fusilli Pasta**


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

Source: Mintel (2014)

# In the Media.

# General Vegetable News
## (June – August 2014)

- Woolworths supermarkets are aiming to increase new products found in-store. Last year they introduced 650 new products, with a proportion of those pre-packaged fruit and vegetables.
- The 'Australia Made' campaign is being launched in South Australia. The logo is used by more than 2,000 companies and is found on over 15,000 products. According to previous research the logo is trusted by 88% of Australians.
- Woolworths' Future of Fresh report examined the landscape of supermarkets in 20 years time. They indicated a shift towards fresh and hyper-local produce. They also suggested that providence will become one of the key triggers to purchase fresh produce.

Source: Australian Food News

# Commodity News
## (June – August 2014)

- In September 2013 Greenpeace secured a halt to the development of GM eggplant in the Philippines. However, in July 2014 the Supreme Court in reversed this decision because of a possible threat to other genetically modified (GM) crops that contribute to food security.

http://www.manilatimes.net

- A widespread exotic pathogen which attacks celery has prompted an emergency biosecurity response from the DOA. The pathogen has spread rapidly across geographically distant areas, including France, Norway, Spain, Sweden and Morocco; requiring emergency measures to apply to relevant imports from any country of origin.

http://www.queenslandcountrylife.com.au/

- The secret to beautiful eyes: cool slices of cucumber placed under the eye are a beauty mainstay because they really work, drawing sodium from the body and reducing puffiness and irritation. But they also work on the inside – eating foods rich in hydration, like cucumber, will help to hydrate your body.

http://www.yahoo.com/beauty

- National Zucchini Day was on August 8 2014. To honour the zucchini people serve dishes with zucchini as the main ingredient. It is an event aimed at foodies and vegetarians, while also showing non-veggie lovers the variety of ways in which zucchini can be used.

http://www..prevention.com

# Thanks.