Horticulture Australia and AUSVEG.

VG12078 Project Harvest.

Tracker Report Wave 17: Green Bean, Carrot, Cauliflower & Pumpkin

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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 17, October 2014) focuses on:

- Green Beans
- Carrots
- Pumpkins
- Cauliflowers

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

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

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=300 respondents completed the commodity 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 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 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.

General Respondent Questions

Demographics

Vegetable Consumption

Commodity 1 | **Commodity 2** | **Commodity 3** | **Commodity 4**

Commodity Specific Questions

Category Health

Purchase & Consumption Habits

Price Perceptions & Average Spend

Triggers/Barriers to Purchase

Preparation Preferences

+ 2 Ad-hoc Questions per Month

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Sample.

In total, 556 respondents completed the questionnaire. Respondents represented all States and Territories, as well as both metro and rural areas.

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

To qualify for the questionnaire, respondents...

⇛Were aged 18 years and over

⇛Purchased fresh vegetables at least once a month

⇛Purchased at least one of the monthly commodities (Bean, Carrot, Cauliflower or Pumpkin) within the last month

⇛Were the main or joint grocery buyer

	Total N=556	Bean N=279	Carrot N=306	Cauliflower N=302	Pumpkin N=302
Gender					
Male	41%	38%	48%	38%	39%
Female	59%	62%	52%	62%	61%
Age					
18-24 y.o.	7%	9%	7%	7%	6%
25-34 y.o.	19%	20%	17%	20%	18%
35-44 y.o.	15%	15%	15%	14%	15%
45-54 y.o.	17%	18%	17%	16%	15%
55-64 y.o.	23%	21%	22%	22%	26%
65+ y.o.	19%	17%	22%	21%	19%
Household					
Single Income no Kids	18%	16%	17%	20%	17%
Double Income no Kids	20%	22%	22%	19%	17%
Young Families	18%	18%	16%	16%	21%
Established Families	22%	25%	20%	22%	21%
Empty Nesters	23%	19%	25%	23%	24%
Location					
New South Wales	21%	20%	22%	21%	21%
Victoria	24%	22%	27%	23%	24%
South Australia	15%	18%	13%	15%	13%
Queensland	19%	21%	17%	20%	19%
Western Australia	15%	15%	13%	15%	15%
Tasmania	4%	2%	5%	4%	5%
Australian Capital Territory	2%	1%	3%	2%	3%

**Low number of completes for bean were due to low incidence of purchase*

Trends Research: Our Approach

- Colmar Brunton has used a combination of both desk research and in the field 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.

Commodity

Number of Launches L3M

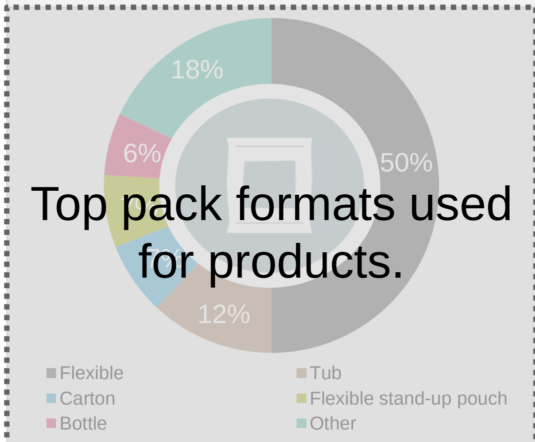
Country

Top countries where products were launched.

Region

What regions new products were launched in.

Top Pack Formats



Top pack formats used for products.

Top Categories

Top categories that products were launched in.

Top Claims

Top claims made by products that were launched.

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Wave 17: Executive Summary

Beans Grower Action Plan

21% Of consumers indicate that wanting a variety of vegetables in their diet is a key barrier to future purchase

1.

Insight:

Steaming remains the key cooking technique and beans are typically served with carrots and potatoes.

Recommendation:

Offer fresh, ready to steam options that pair beans with carrots and potatoes. Investigate sauces, herbs and spices that can diversify cooking cuisines.

2.

Insight:

Consumers are placing a decreased importance on provenance, and where their beans are grown.

Recommendation:

Consumers associate 'Australian grown' with quality and freshness. Educate consumers of the benefits of 'Australian grown" by highlighting these selling qualities where possible- on packaging and in-store to communicate value for money.

3.

Insight:

A large number of consumers purchase their beans from speciality grocers or markets.

Recommendation:

Investigate the distribution and supply chain of fresh beans. Examine additional purchase channels, such as smaller, independent retailers to expand your business.

Carrot Grower Action Plan

49% Of consumers indicate that the main barrier to future carrot purchase is they already consume enough for their needs.

1.

Insight:

Australians are consuming carrots very frequently, on average every second day.

Recommendation:

Maintain consumer engagement in the category by promoting alternative varieties such as purple or Chantenay carrots that can be used for special occasions, rather than everyday consumption.

2.

Insight:

For a vegetable that is consumed so frequently, awareness of carrot types remains very low.

Recommendation:

Differentiate carrot types by providing consumers with flavour profiles (taste is a key trigger to purchase). Descriptors should indicate the strength and type of flavour to expect.

3.

Insight:

Nearly half of all consumers eat carrots raw.

Recommendation:

Investigate raw snacking options to increase consumption occasions outside of dinner meals.

Cauliflower Grower Action Plan

Cauliflower holds low importance to consumers in comparison to other vegetables.

1.

Insight:

Purchase and consumption frequency trending higher.

Recommendation:

Maintain increased frequency by promoting its 'superfood' status and health benefits of cauliflower, a key trigger to purchase, which in turn may increase importance to consumers.

2.

Insight:

Cooking of cauliflower is restricted to a few techniques, mainly steaming.

Recommendation:

Educate consumers on the versatility of cooking cauliflower with recipe and substitution ideas, such as stewing in curries, roasting for salads or substitution for rice.

3.

Insight:

Low global innovation for cauliflower products.

Recommendation:

Investigate fresh cauliflower products, such as time saving products that will appeal to convenience-focussed shoppers.

Pumpkin Grower Action Plan

66% Of consumers indicate that taste is the key trigger to future purchase.

1.

Insight:

High level of awareness for multiple types of pumpkin.

Recommendation:

Provide consumers with further information to differentiate types on pumpkin on most suitable cooking techniques and distinct flavour profiles.

2.

Insight:

Consumers opt for cut formats, half and quarter pumpkin are most commonly purchased.

Recommendation:

Investigate growing and producing mini-pumpkin varieties to reduce the need for cut formats and packaging.

3.

Insight:

Global activity in pumpkin snack and bakery product innovation.

Recommendation:

Examine the opportunities of developing processed pumpkin products, including pumpkin seed bread or pumpkin chips.

Fact Base

- Overall, Beans has low consumer sentiment, especially for endorsement and consumer recommendation.
- Beans are purchased 3.6 times per month and consumed on average 8.4 occasions per month. Both of which are on trend with previous months.
- Consumers typically purchased 600g of beans per shop, which was on trend with Wave 9 and 13. Individual beans are most often purchased. Recalled last spend was $3.50. Perceived value for money is poor (6.0/10).
- Price tracking indicated a consistent price per kg; $5.63 nationally. There was a retail price range of $4.00 per kg.
- Awareness of bean types remains very low, with over half respondents unable to recall a type of bean. This was consistent with previous waves.
- Main triggers to future purchase are health and ease of preparation and cooking. Consuming enough for their needs and wanting variety in their diet are the main barriers to purchase.
- Consumers expected beans to remain fresh for a week after purchase. Generally this expectation is met.

Fact Base

- Consumer satisfaction with carrots is on trend with all commodities tracked thus far, with the exception being importance which was relatively low.
- On average carrots were purchased 3.8 times per month and consumed 15.5 times per month. Consumption is up on previous waves.
- Consistent with previous waves, 1.2kg of carrots were purchased. Recalled last spend was $2.40. Overall, consumers perceive carrots as very good value for money.
- National pricing analysis revealed a slight increase from June at $2.03kg.
- Awareness of carrot types remained low. Purple and baby carrots have the highest awareness.
- Key triggers to purchase were health and ease of preparation consistent with previous months. A key barrier to purchase was that consumers already purchase enough for their needs.
- Carrots were expected to stay fresh for over 12 days. Nearly two thirds of consumers indicated this freshness was met most of the time.

Fact Base

- Consumer sentiment remains low, especially perceived importance of cauliflower and interest in new varieties. Purchase intent was on trend with the Harvest average.

- On average consumers purchased cauliflower 3.4 times per month, both of which are higher than previous months. Purchase was from mainstream retailers.

- Cauliflower was mainly purchased in whole formats, with consumers recalling weight of purchase at 1.1kg. Recalled last spend was $3.10, which was considered only fair value for money.

- Price analysis revealed a national average retail price of $3.58 each, which was consistent with previous waves.

- Key triggers to purchase cauliflower are adding variety to their vegetable selection and health. Consuming enough for their needs is the main barrier to purchase.

- Cauliflowers were expected to stay fresh for over 8 days. Expectations of freshness were typically met.

Fact Base

- Consumer sentiment was in line with the commodity averages.

- Pumpkins are purchased 3.1 times per month and consumed 9.1 times per month, consistent with previous waves. Pumpkin is typically purchased from mainstream retailers.

- Consumers purchase on average 1.4kg per shop. Recalled last spend was $3.25 which was perceived to be good value for money. This is consistent with previous months.

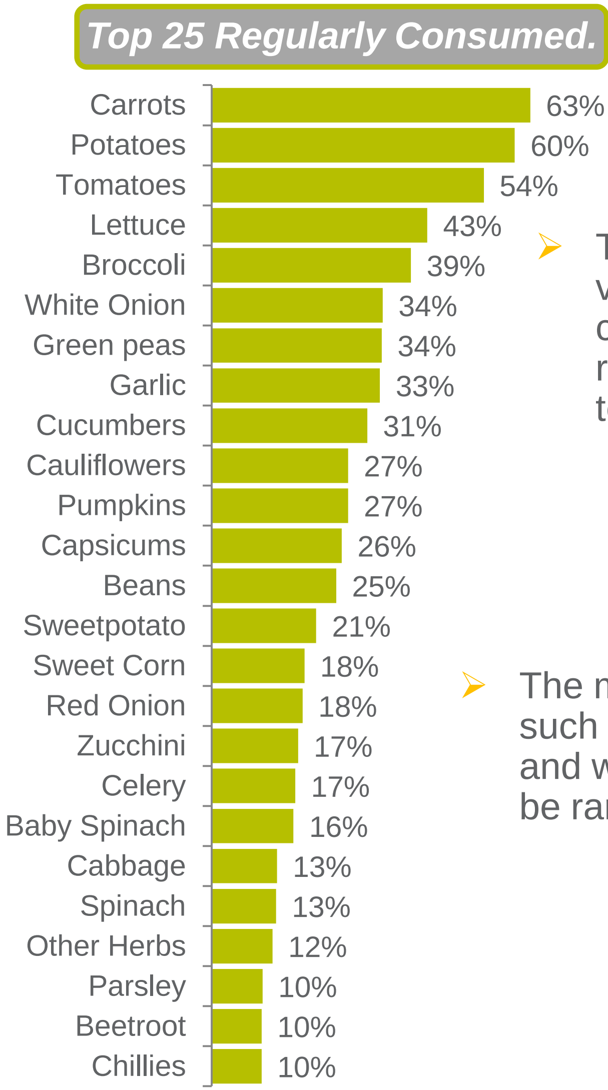
- Price tracking showed that prices varied little by state or retailer, and the average price was $3.23/kg. The retail price range was $2.48.

- Triggers to purchase remain taste and adding variety to their vegetables. Consuming enough for their needs is the key barrier to purchase.

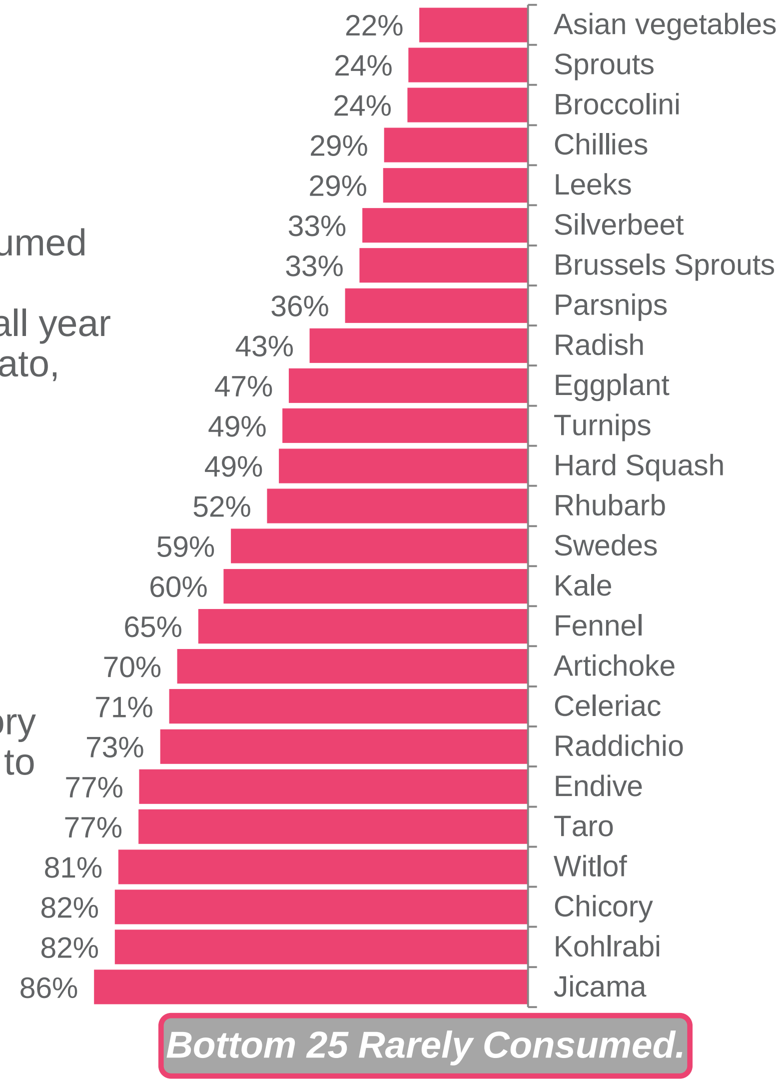
- Pumpkin is expected to stay fresh for over 12 days, consistent with previous waves. Overall, this expectation is typically met.

Wave 17:
Ad-Hoc Questions

Vegetables Consumed Regularly vs. Rarely.



- The most frequently consumed vegetables were those commonly found in store all year round, such as carrot, potato, tomato and lettuce.
- The more obscure vegetables such as jicama, kohlrabi, chicory and witlof were the most likely to be rarely or never consumed.

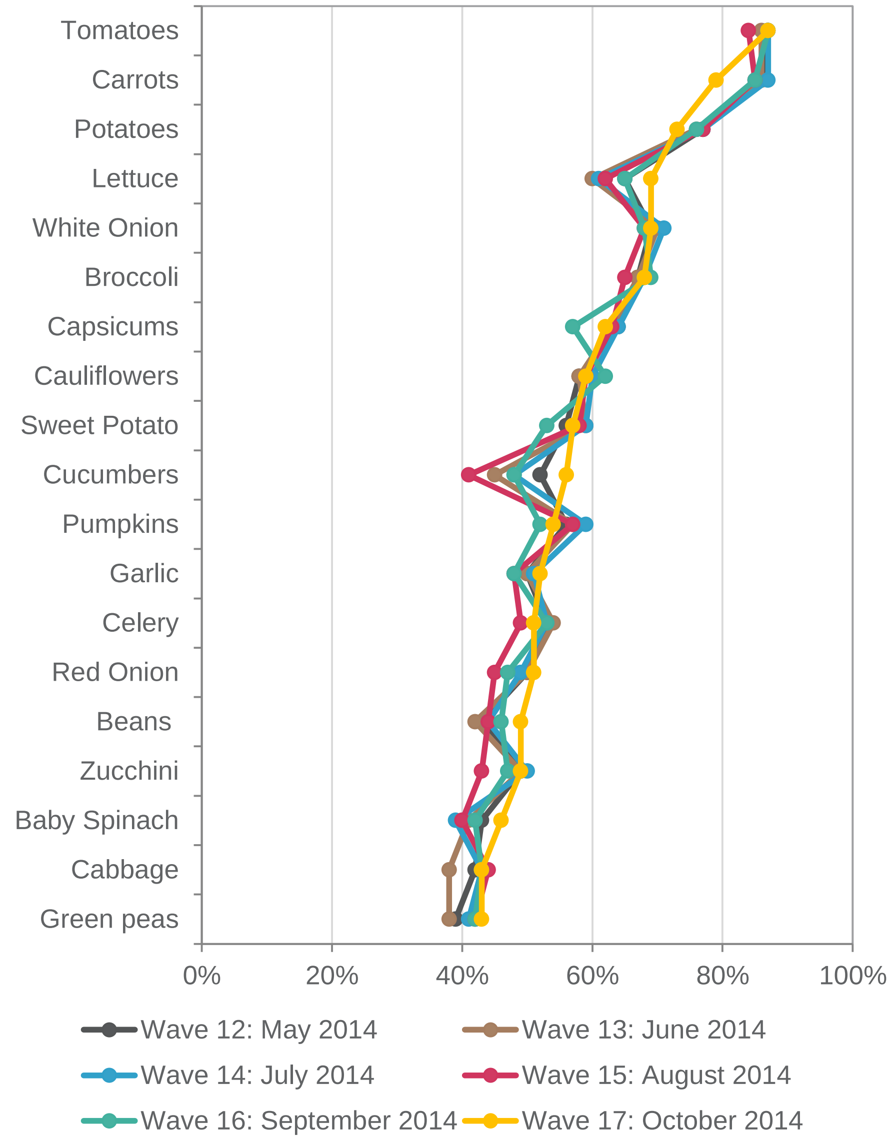


N=556
AHQ1. Which vegetables do regularly consume, at least 5 times per week?
AHQ2. From the list of vegetables below, please select the vegetable(s) that you never/rarely consume?

Wave 17: Overall Vegetable Tracking

Vegetables Purchased Last Month

- Vegetable purchase was consistent with recent months.
- This month saw an increase in purchase of lettuce and cucumbers, which may reflect entering the warmer seasons.
- Tomatoes, carrots and potatoes were purchased most frequently over the past month. This was consistent with previous purchase trends.



Sample Wave 17 N=921
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.

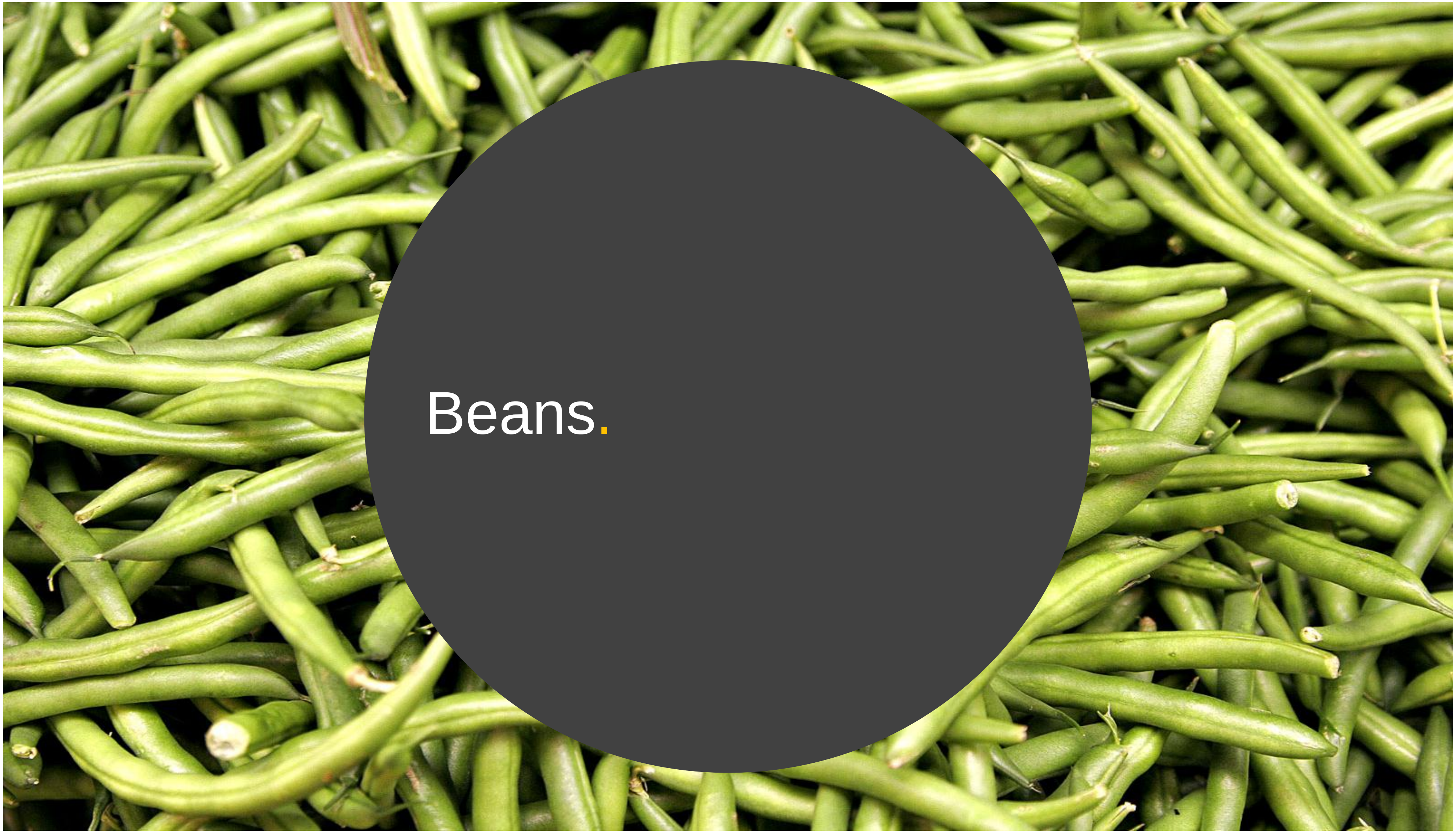
The Harvest Mean is the average of all commodities tracked thus far.

- 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** *commodity* more, the same or less?

Category Health

- Beans maintain low category health and consumer sentiment in comparison to other vegetables. In particular, endorsement of beans is especially poor, which may indicate lack of engagement by consumers and also lack of innovation in the market.
- Cauliflower holds particularly low importance to consumers, however future purchase intent is consistent with the average of vegetables tracked thus far.
- Consumers appear to be relatively satisfied with the range of carrots and pumpkin currently available. Levels of endorsement for these two vegetables is in line with the Harvest mean.

	Beans	Carrot	Cauliflower	Pumpkin	Harvest Total Mean
Importance	5.7	5.6	4.9	6.3	6.2
Satisfaction	6.0	6.6	6.4	6.7	6.5
Endorsement	6.1	6.9	6.4	6.8	6.8
Interest (New Varieties)	5.8	5.9	5.6	6.2	6.1
Future Purchase					
More	12%	13%	14%	12%	14%
Same	85%	87%	85%	85%	84%
Less	3%	0%	1%	3%	2%



Beans.

Purchase and Consumption Behaviour

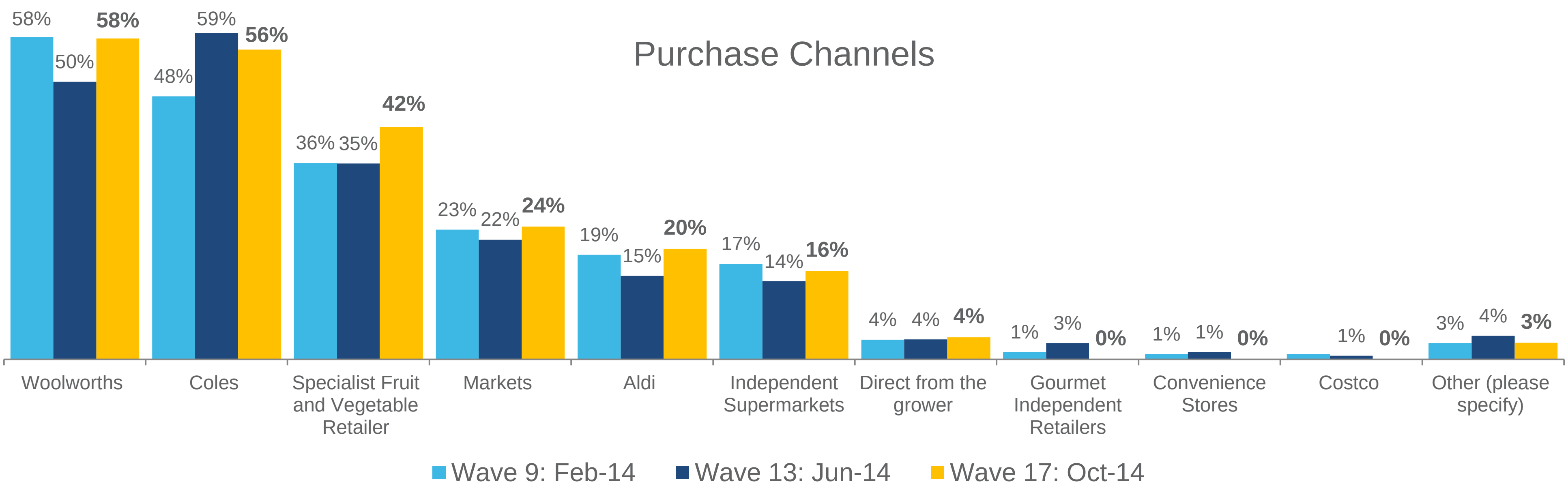
Average Purchase **3.6** times per month

3.7 times, Wave 9
3.6 times, Wave 13

Average Consumption **8.4** times per month

8.4 times, Wave 9
7.4 times, Wave 13

- Average purchase frequency remains stable since the previous wave yet remained marginally below Wave 9. Consumption sees an increase to return to the highs seen in Wave 9.
- Coles and Woolworths sit almost at parity for main purchase location of beans. Purchase from a Specialist Fruit and Vegetable Retailers have largely increased from previous waves.



Q1. On average, how often do you purchase French and runner beans?
Q2. On average, how often do you consume French and runner beans?
Q5. From which of the following channels do you typically purchase French and runner beans?
Sample, Wave 9 N=307, Wave13 N=305, Wave 17 N=279

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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 typical consumer purchased **600g** of beans, which was consistent with the two previous waves.

— 600g, Wave 9
— 600g, Wave 13

Recalled last spend

Recalled last spend on bean purchase was **$3.50**, showing slight decline over the previous wave, but in line with Wave 9.

— $3.50, Wave 9
▲ $3.60, Wave 13

Value for money

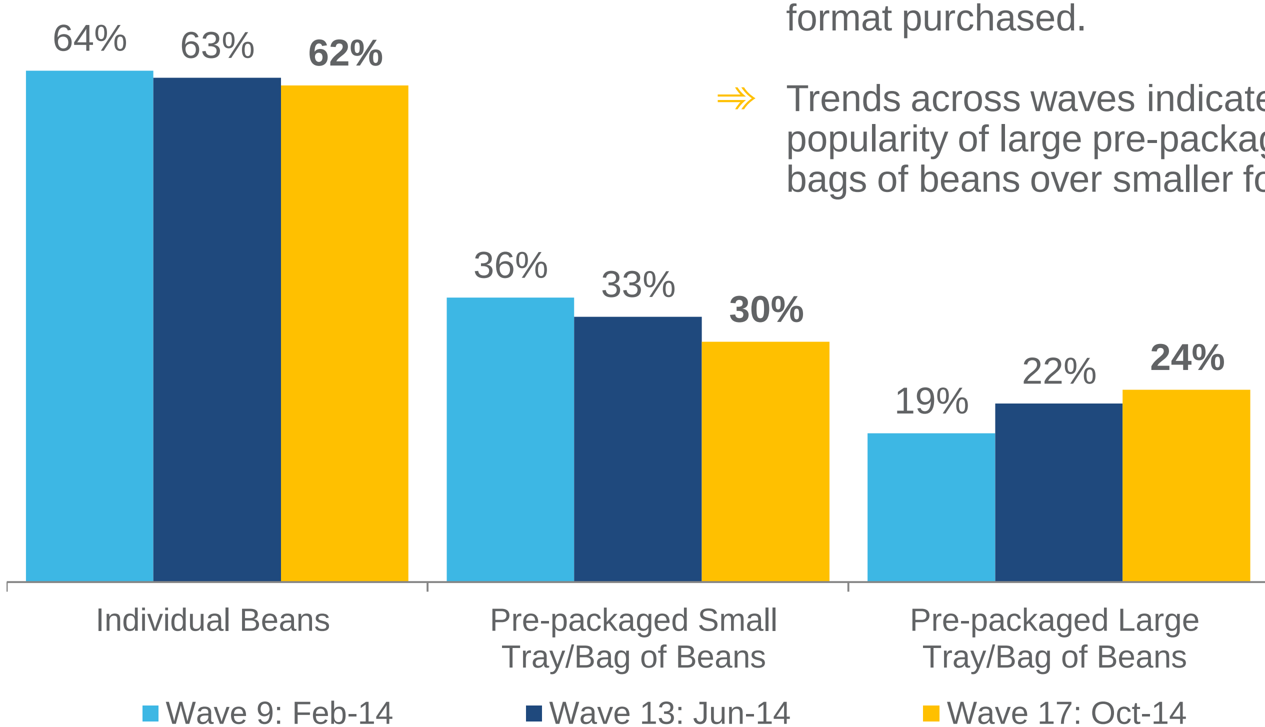
Consumer's perceived value for money was relatively fair **(6.0/10)**, showing signs of improvement since the previous wave.

▲ 6.1/10, Wave 9
▼ 5.9/10, Wave 13

Q3. How much French and runner beans 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 9 N=307, Wave13 N=305, Wave 17 N=279

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

Pack Formats Purchased



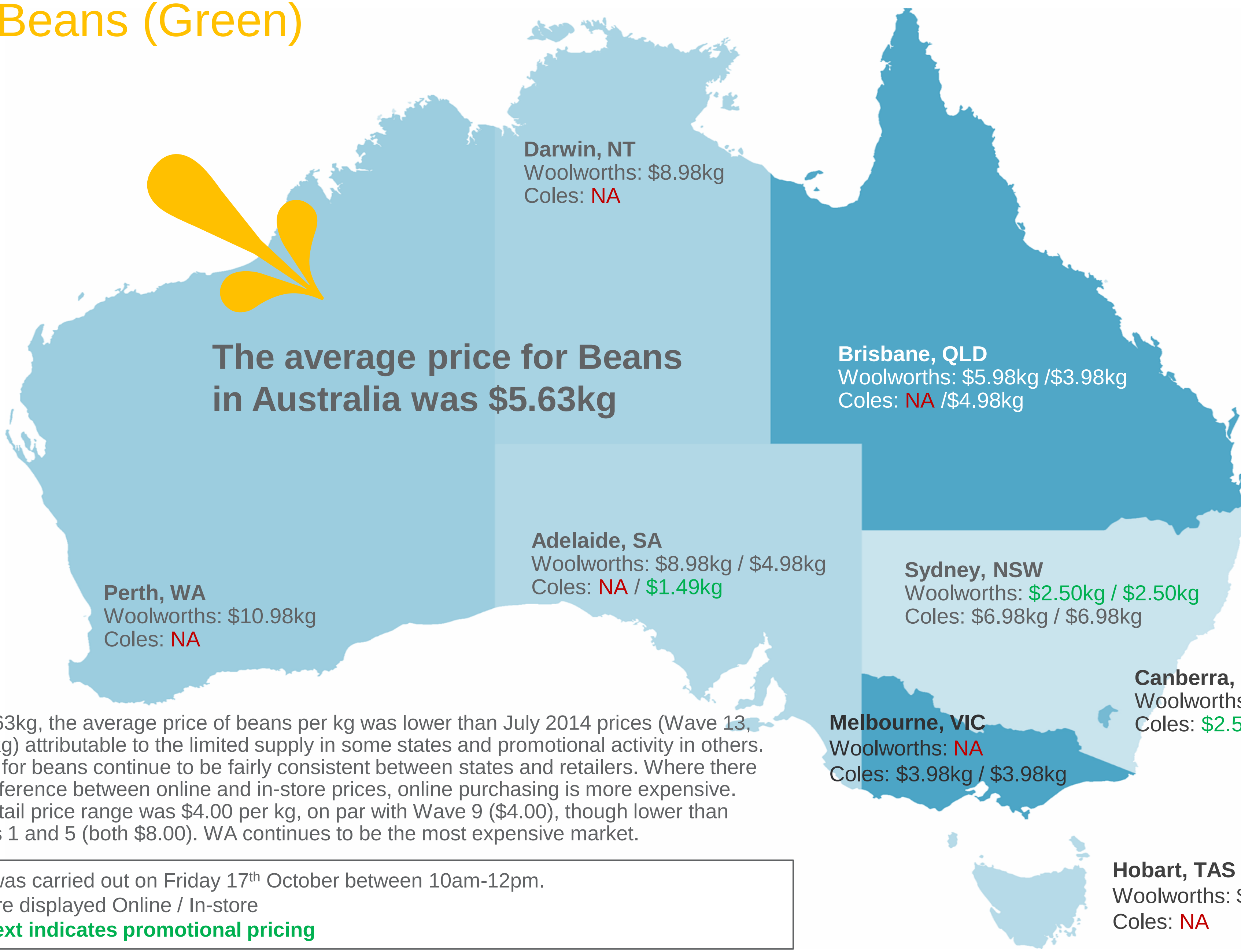
- Individual beans remain the dominant format purchased.
- Trends across waves indicate the increasing popularity of large pre-packaged trays and bags of beans over smaller formats.

Average number purchased	Individual Beans	Small Tray	Large Tray
Wave 9: February 2014	76.6	1.5	1.5
Wave 13: June 2014	68.3	1.3	1.2
Wave 17: October 2014	49.1	1.3	1.3

Q3a. How much French and runner beans does this typically equate to?
Sample, Wave 9 N=307, Wave13 N=305, Wave 17 N=279

Online and In-store Commodity Prices

Beans (Green)

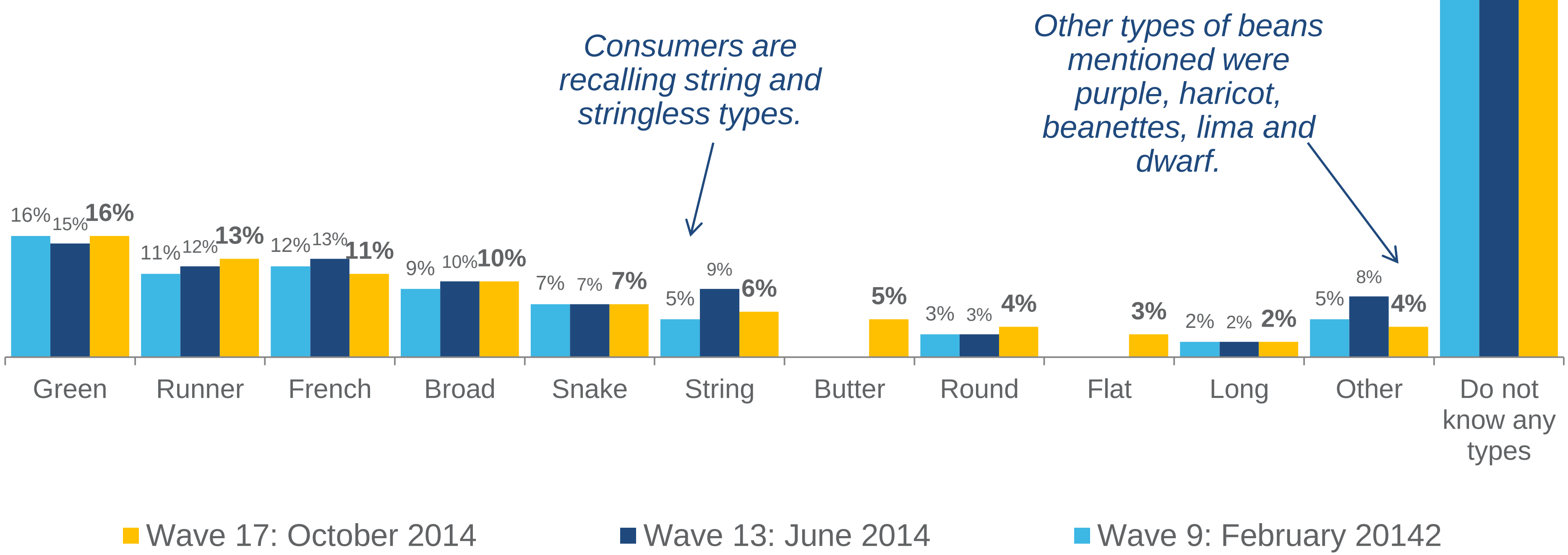


- At $5.63kg, the average price of beans per kg was lower than July 2014 prices (Wave 13, $5.98kg) attributable to the limited supply in some states and promotional activity in others.
- Prices for beans continue to be fairly consistent between states and retailers. Where there is a difference between online and in-store prices, online purchasing is more expensive.
- The retail price range was $4.00 per kg, on par with Wave 9 ($4.00), though lower than Waves 1 and 5 (both $8.00). WA continues to be the most expensive market.

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

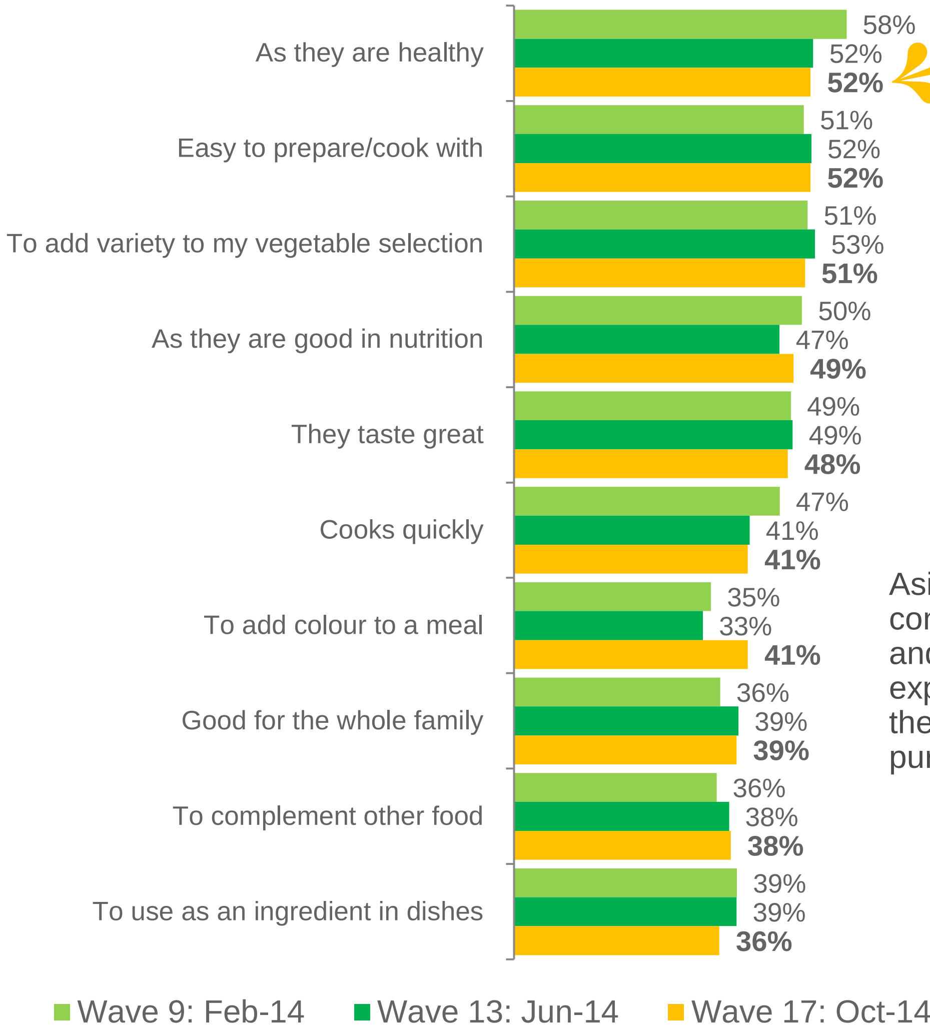
Spontaneous Varietal Awareness

- Over half of the respondents are unable to recall any type of green bean, which is consistent with previous waves.
- Green beans are the most recalled variety, followed by Runner and French beans. Butter and flat beans are also more prominently recalled this wave.



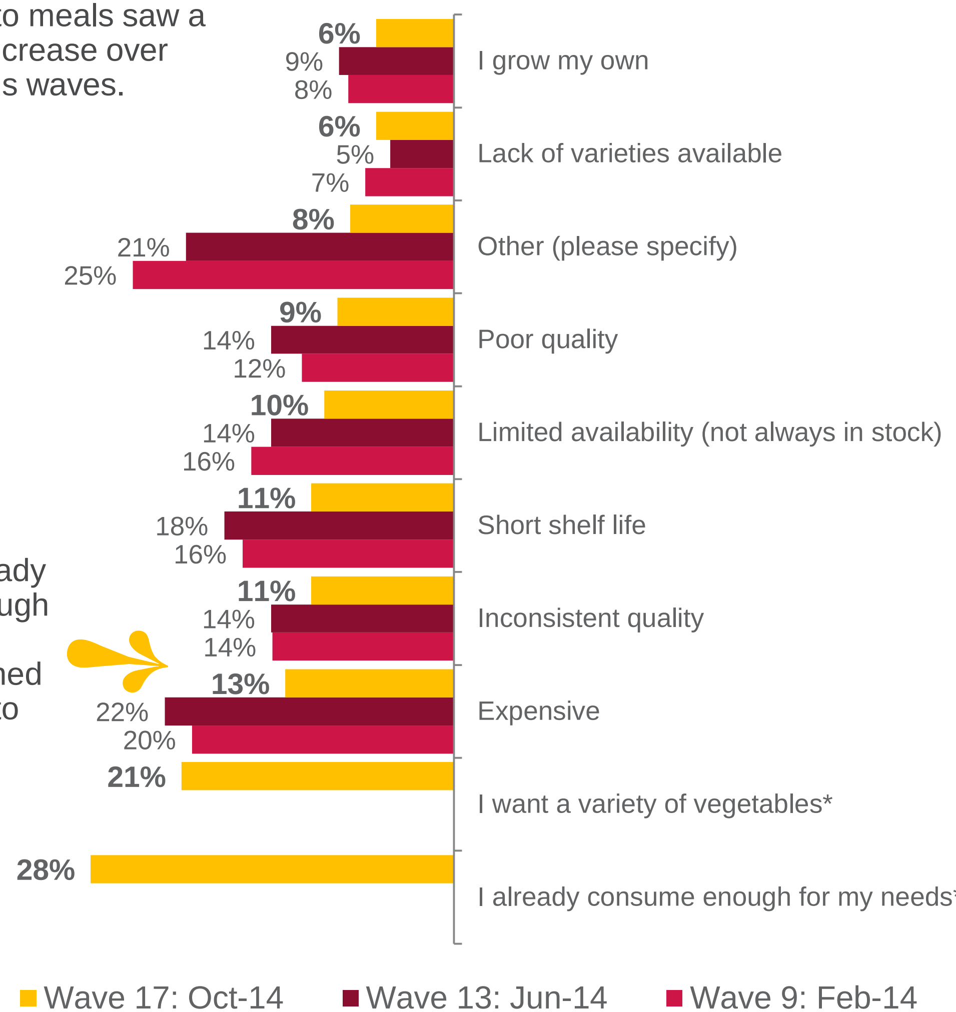
Q6a. What varieties/types of French and runner beans are you aware of? (unprompted)
Sample, Wave 9 N=307, Wave13 N=305, Wave 17 N=279

Triggers & Barriers to Purchase



The top two triggers to purchase are health and ease of cooking. Adding colour to meals saw a large increase over previous waves.

Aside from already consuming enough and variety, expense remained the key barrier to purchase.



Q7. Which of the following reasons best describes why you purchase French and runner beans?
Q8. Which reason best describes why you don't buy French and runner beans more often?
Sample, Wave 9 N=307, Wave13 N=305, Wave 17 N=279
*New codes added at Wave 17

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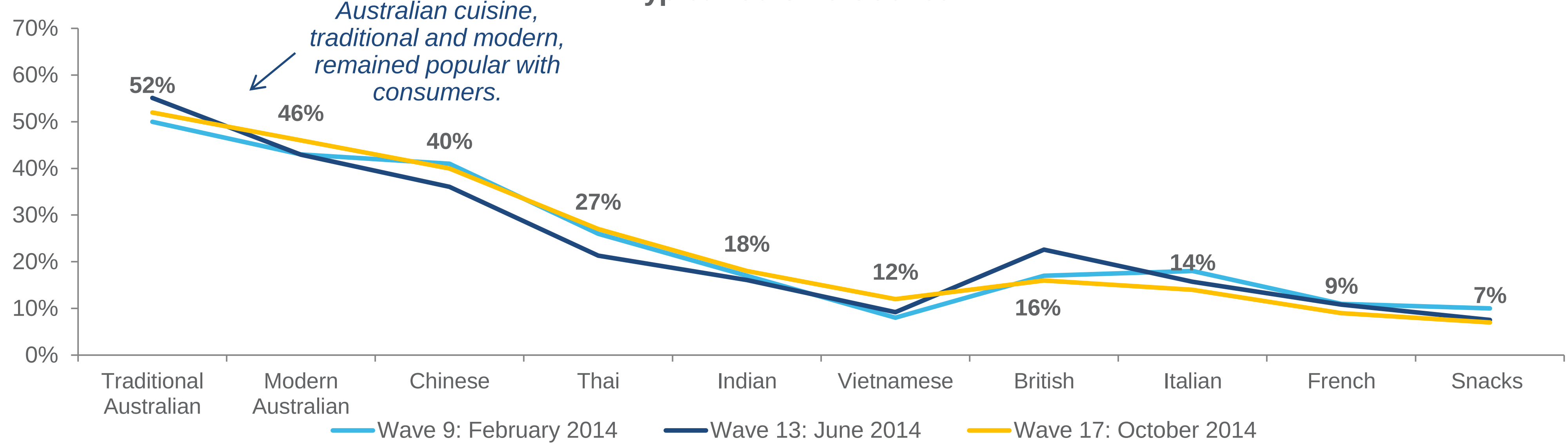
Cooking Cuisine & Occasions

- Dinner remains the primary consumption occasion for beans.
- Australian cuisine (traditional and modern) are most commonly cooked.

Wave 17 Top 5 Consumption Occasions

Weekday Dinner	63%	▼ 59%	Wave 13	▲ 64%	Wave 9
Weekend Dinner	44%	▼ 36%	Wave 13	▼ 38%	Wave 9
Every-day meals	34%	▼ 32%	Wave 13	▼ 33%	Wave 9
Family meals	33%	▲ 38%	Wave 13	▲ 37%	Wave 9
Quick Meals	29%	▼ 24%	Wave 13	▼ 24%	Wave 9

Typical Cuisine Cooked



← Australian → ← Asian → ← European → Snacks

Q10. What cuisines do you cook/consume that use French and runner beans?
Q11. Which of the following occasions do you typically consume/use French and runner beans?
Sample, Wave 9 N=307, Wave13 N=305, Wave 17 N=279

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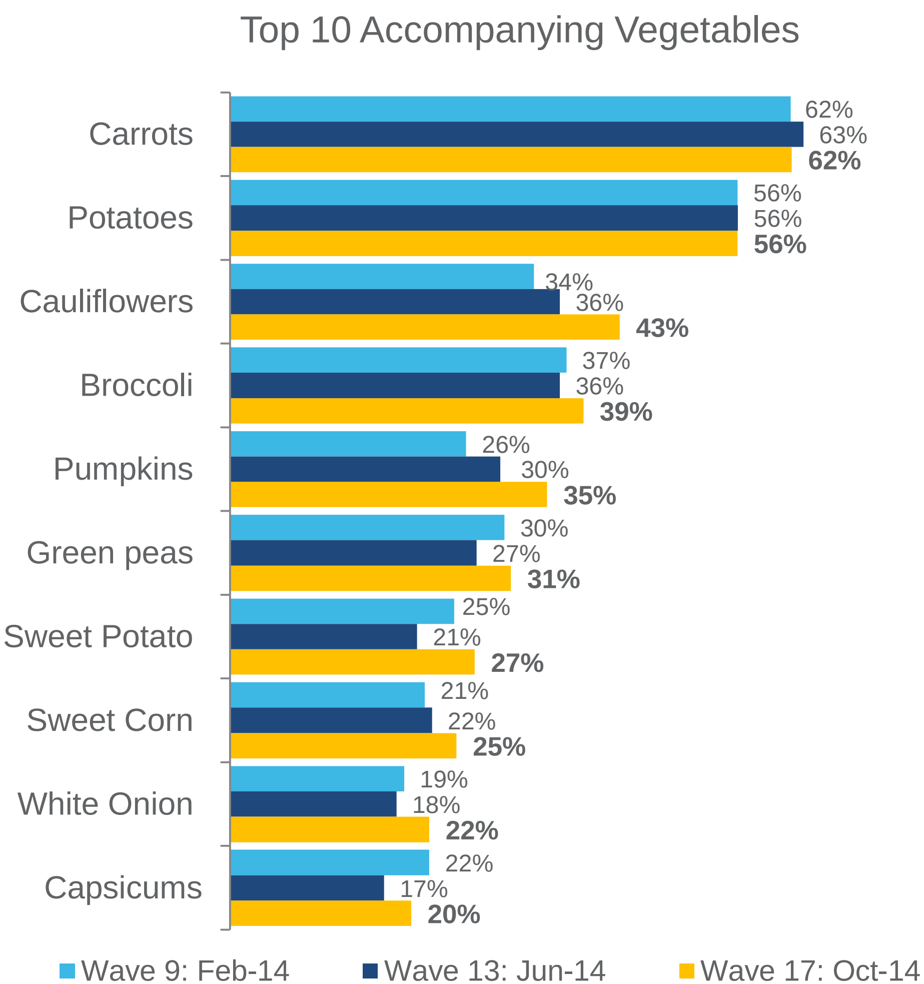
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Cooking Preferences



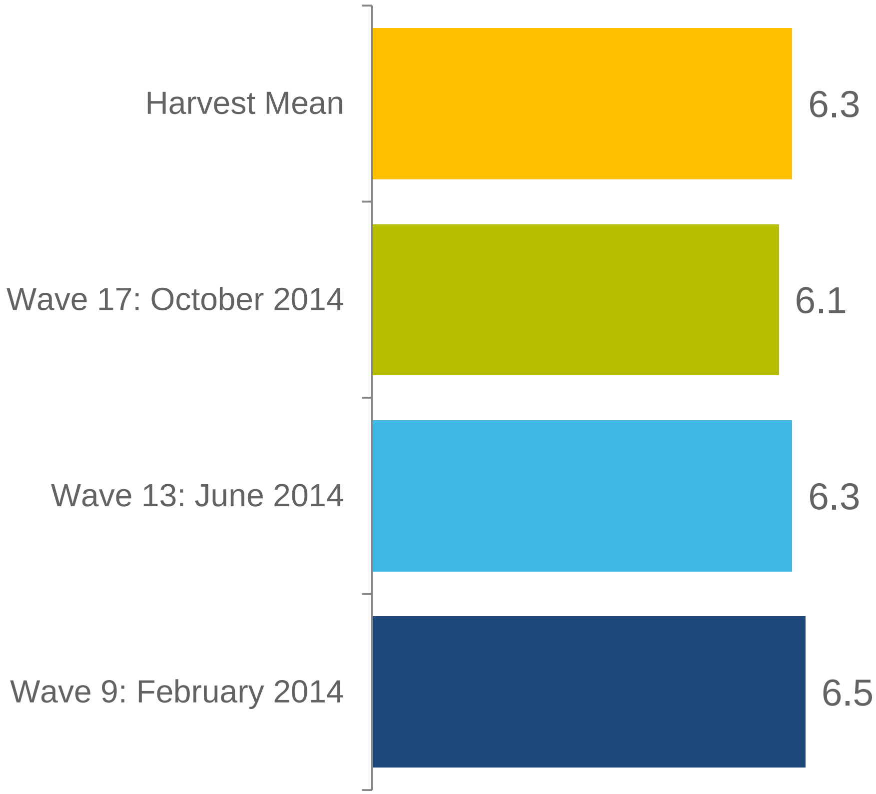
- Beans are primarily served with carrots and potatoes, consistent across the last three waves.
- Steaming remains the most common cooking technique, but displays a downward trend. Both stir frying and boiling were more prevalent compared with the previous wave.

Top 10 Cooking Styles			
	Wave 9	Wave 13	Wave 17
Steaming	**56%**	**53%**	**52%**
Stir frying	**50%**	**42%**	**48%**
Boiling	**35%**	**35%**	**38%**
Microwave	27%	23%	23%
Blanche	14%	16%	14%
Soup	13%	14%	12%
Raw	18%	12%	15%
Stewing	12%	10%	12%
Sautéing	14%	9%	10%
Shallow Frying	4%	3%	5%

Q9. How do you typically cook French and runner beans?
Q10a. And when are you serving French and runner beans which of the following do you also serve together with this?
Sample, Wave 9 N=307, Wave13 N=305, Wave 17 N=279

Importance of Provenance

- Importance of bean provenance has seen a continuous downward trend over previous waves, dropping to the lowest measurement recorded across all waves and below the current Harvest Mean, indicating a declining interest in where beans are grown.



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Q14. When purchasing <commodity>, how important is Provenance to you?
Sample, Wave 9 N=307, Wave13 N=305, Wave 17 N=279

Freshness and Longevity

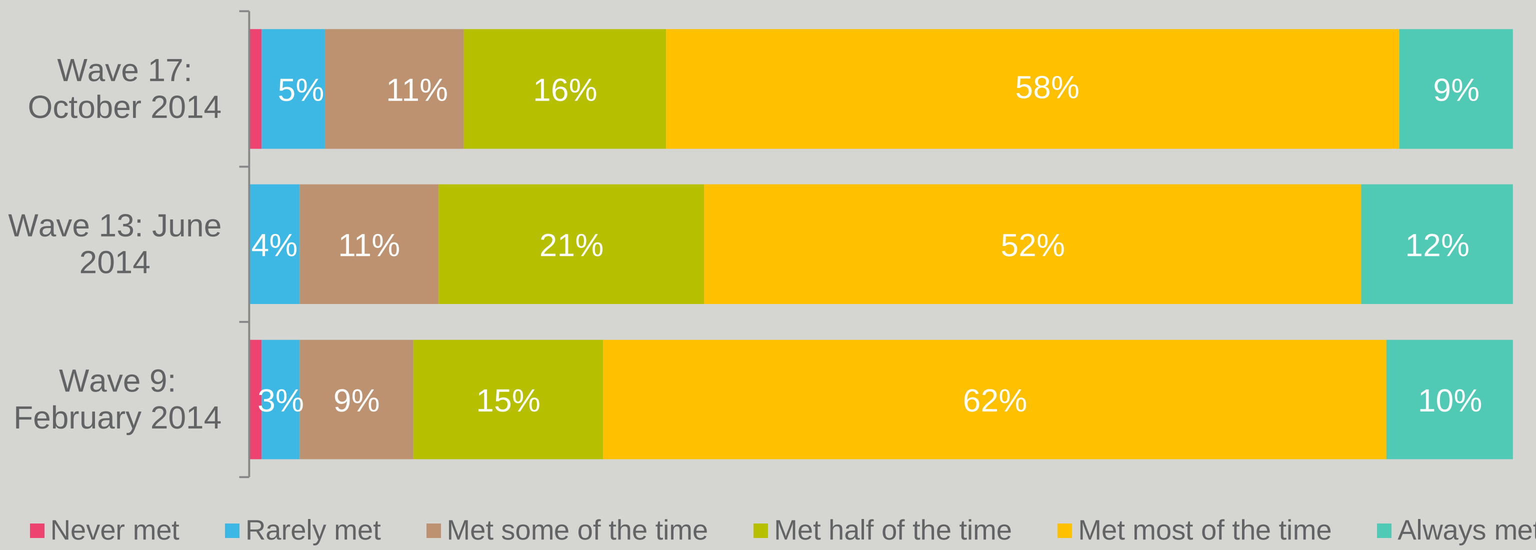
Expected
To stay
fresh for
7.2 days

▼ 6.9 days, Wave 9
— 7.2 days, Wave 13

⇒ Expected freshness remains consistent with the previous wave, with consumers expecting beans to remain fresh for around a week once purchased.

⇒ Expectations of freshness improved over the previous wave, with expectations being met most of the time.

Expectations Met



Q12. How long do you expect French and runner beans to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy French and runner beans?
Sample, Wave 9 N=307, Wave13 N=305, Wave 17 N=279

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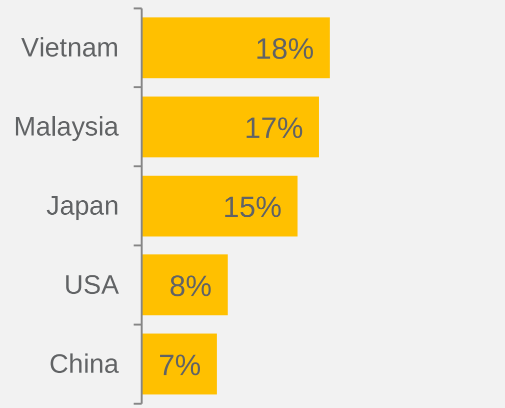
French & Runner Bean Product Launch Trends.

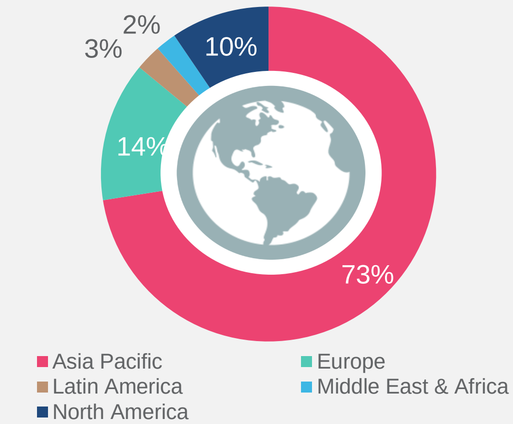
Bean Global NPDs
August – October 2014

200 products containing green beans were launched globally in the last three months. Asia Pacific was the key regions for launches. Baked goods and meals were top categories with seasonal and health claims utilised most.

Country

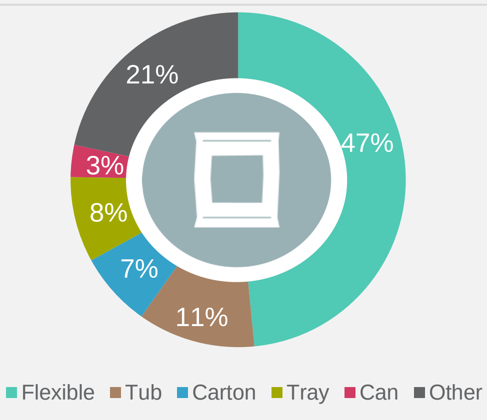


Region



200 Global NPDs

Top Pack Formats



Categories

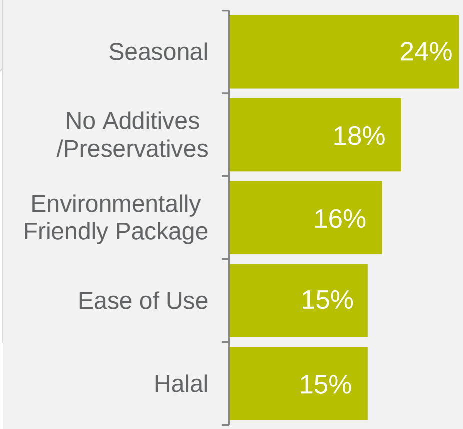
Bakery 32%

Meals 17%

Snacks 9%

Dessert & Ice Cream 9%

Top Claims



French & Runner Beans Product Launches:
Last 3 Months (August – October 2014)
Summary

- A total of 200 products containing French and Runner beans as an ingredient were launched globally in the last 3 months, which is consistent with previous trends.
- There were no products launched in Australia in the past three months.
- Asia Pacific (73%) continued to be the top region for product launches, while North American launches declined.
- Flexible (47%) and tub (11%) packaging formats are consistently used for bean products launched.
- The top categories for product launches were baked goods (32%), meals (17%) and snacks (9%), consistent with top 3 launches in previous waves.
- The core claims used for these launches globally were seasonal (24%), no additives/preservatives (18%) and environmentally friendly packaging (16%).
- The prominent seasonal claim and an increase in baked goods correlates with multiple launches of Moon Cakes for the 2014 Mid Autumn Festival.
- The most innovative launches were a green bean, pear & pea tetrapak for kids and a green bean baby powder (Examples of these products can be found in upcoming slides) .

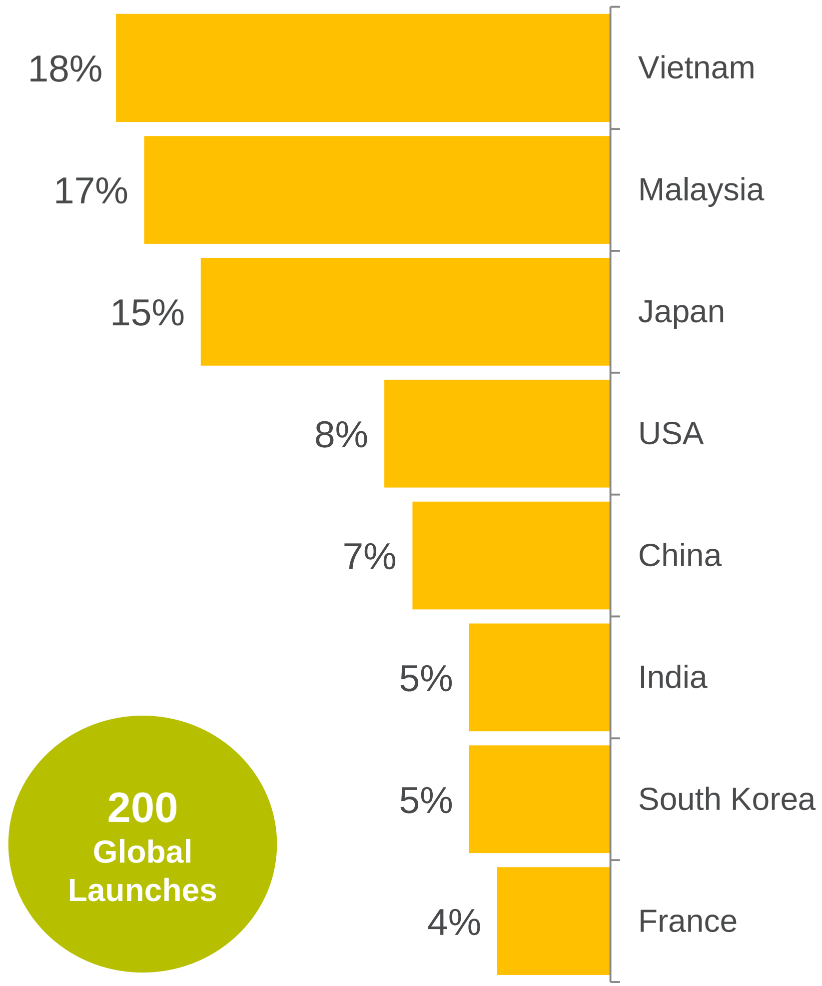
Source: Mintel (2014)

French & Runner Bean Launches

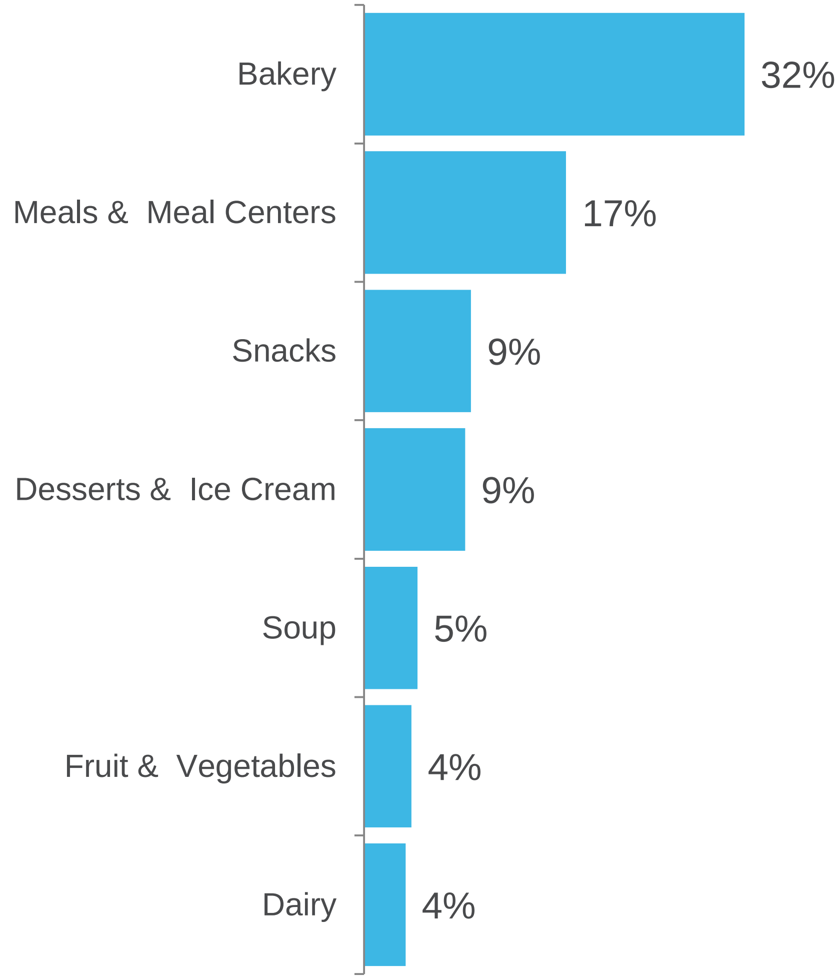
Country, Region & Categories

- Vietnam was the key country for green bean product launches, followed by Malaysia and Japan.
- Bakery, meals and snack products were the top categories for launches, consistent with previous trends. Bakery has seen an increase since Wave 13 (April-June 2014), with number of launches rising from 33 to 64.

Top Launch Countries



Top Launch Categories



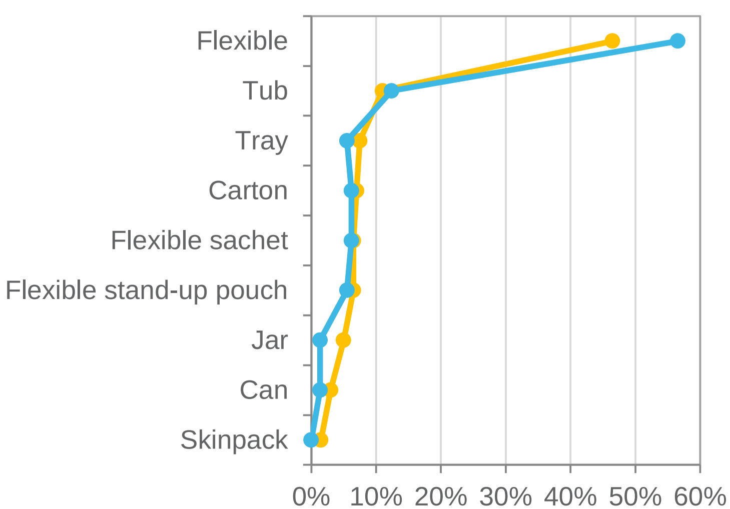
Number of Global Beans NPDs for the L3M N=200

French & Runner Bean SKUs

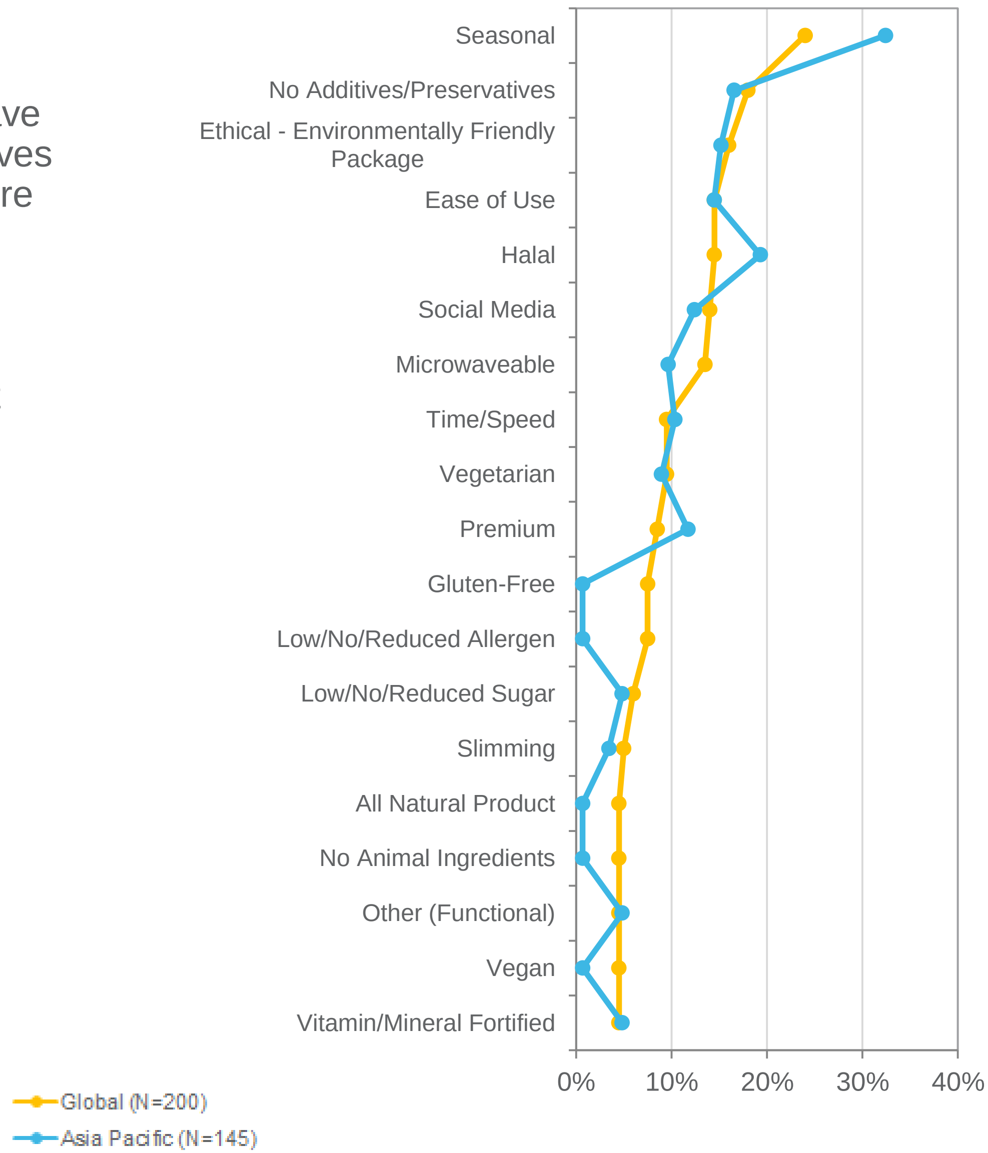
Top Claims & Pack Formats Used

- Seasonal was the most prominent claim in Wave 17, closely followed by no additives/preservatives and ethical packaging. Seasonal and Halal were more popular as a claim in Asia Pacific, coinciding with an increase in Moon Cake launches for Mid Autumn Festival.
- Globally the top pack formats used for product launches was flexible packaging and tubs, consistent with previous trends.

Pack Formats Launched



Top Claims Used



Number of Global NPDs for the L3M N=200
Only regions with n >30 are displayed

Innovative French & Runner Bean Launches:
L3M (August – October 2014)

Fujiya Pop Candy Vegetable & Fruit Candy (Japan)

Fujiya Pop Candy Vegetable & Fruit Candy is designed for two years and up. It contains green tea polyphenol for teeth and retails in a pack containing five candies. Launched in April 2014, open-priced.

Claims:
Other (Functional), Babies & Toddlers (0-4)

M&N Bear Baby Natural Green Beans Baby Powder for Rash (China)

M&N Bear Baby Natural Green Beans Baby Powder for Rash contains various plant cooling ingredients, such as green beans, anthemis tinctoria and mint extracts, to soothe and prevent the production of rashes and skin damage, for a refreshed, dry and comfortable finish. This product comes with a sponge, and retails in a 140g pack.

Claims:
Botanical/Herbal, For Sensitive Skin, Babies & Toddlers (0-4)

Happy Tot Organic Green Bean, Pear & Pea Fruit & Veggie Blend (Canada)

It's a certified organic blend of vegetables and fruit with Salba chia seed. This kosher certified product for toddlers is a source of omega-3 polyunsaturated fatty acids and 5g fibre, and contains no added sugar or salt. It retails in a 128ml easy, portable pack made without the use of BPA. The packaging features a Facebook link.

Claims:
Social Media, Convenient Packaging, Kosher, On-the-Go, Low/No/Reduced Sugar, Organic, Low/No/Reduced Sodium, Babies & Toddlers (0-4)

Nestlé Health Science Compleat Pediatric Reduced Calorie Unflavored Beverage (USA)

Now available for children with decreased caloric needs. It provides 0.6 calories per one millimeter and contains 40% fewer calories than standard 1.0 calories per one millimeter formulas. Made with real food ingredients including chicken, fruit and vegetables. It is high in calcium and vitamin D to support healthy bone development. This lactose and gluten free product retails in an 8.45 fl. oz. ready to use container.

Claims:
Low/No/Reduced Lactose, Low/No/Reduced Allergen, Low/No/Reduced Calorie, Ease of Use, Gluten-Free, Children (5-12), Bone Health

Source: Mintel (2014)

Innovative French & Runner Bean Launches:
L3M (August – October 2014)

Good Chen Bamboo Charcoal Tambun Biscuit (Malaysia)

Good Chen Bamboo Charcoal Tambun Biscuit using only the finest green bean, covered with a crispy layer of bamboo charcoal skin. Bamboo charcoal has strong absorption quality of toxins, helps to remove waste, strengthens bowel movement and digestion of food. It promotes a healthy and lively environment. The product retails in a 480g pack that contains 16 units.

Claims:
Digestive (Functional)

Ito En Ichinichibun No Yasai Nutrition Fortified Vegetable Juice (Japan)

Features added dietary fibre and iron, and contains vitamin C, beta-carotene, calcium, magnesium and potassium. It is free from added sugar and sodium, and retails in a 125ml carton. Launched on September 8, 2014 with an RRP of 205 yen.

Claims:
High/Added Fiber, Low/No/Reduced Sodium, Vitamin/Mineral Fortified, Low/No/Reduced Sugar

Nestlé Gerber DoRéMi Potatoes with Salmon (Poland)

Nestlé Gerber DoRéMi Ziemniaczki z Łososiem (Potatoes with Salmon) have been reformulated with a new recipe featuring bigger pieces and natural ingredients. The product is free of gluten, preservatives and colourings, suitable for babies aged 12 to 36 months, and retails in a 250g jar.

Claims:
No Additives/Preservatives, Low/No/Reduced Allergen, Babies & Toddlers (0-4), Gluten-Free

Maniker Ginseng Chicken Soup with Green Bean (South Korea)

Maniker Ginseng Chicken Soup with Green Bean consists of wholesome green beans, fresh ginseng and fresh chicken and provides a refreshing soup flavour. This nutritious microwavable product retails in a 900g pack.

Claims:
Microwaveable

Source: Mintel (2014)

Innovative French & Runner Bean Launches:
L3M (August – October 2014)

Taotaoju Pork Floss Flavoured Cloud Muffin (China)

Made using selected wheat flour, green beans and meat floss. Each muffin is filled with sweet and aromatic filling and is wrapped with fine and soft cake. This product is said to be delicious and nutritious, and retails in a 70g pack containing two 35g pack.

Claims:
NA

Kinh Do Crystal Moon Cakes with Green Bean & Melon Seed Filling (Vietnam)

Kinh Do Banh Trung Thu Deo Dau Xanh Hat Dua (Crystal Moon Cakes with Green Bean & Melon Seed Filling) have been repackaged in a newly designed 4 x 250g pack to celebrate the Mid-Autumn Festival 2014. This product is ready to eat.

Claims:
Ease of Use, Seasonal

Kirin Toromi Vegetable Sauce Concentrate (Japan)

Kirin Toromi Vegetable Sauce Concentrate is described as a handy source of 32 vegetables. It could be diluted and made into a drink, or used in cooking. It is free from flavouring, colouring and preservatives, added sugar and salt. It is endorsed by Japan Vegetable Sommelier Association. It retails in a 300g pack. Launched on April 15, 2014 with an RRP of 308 yen.

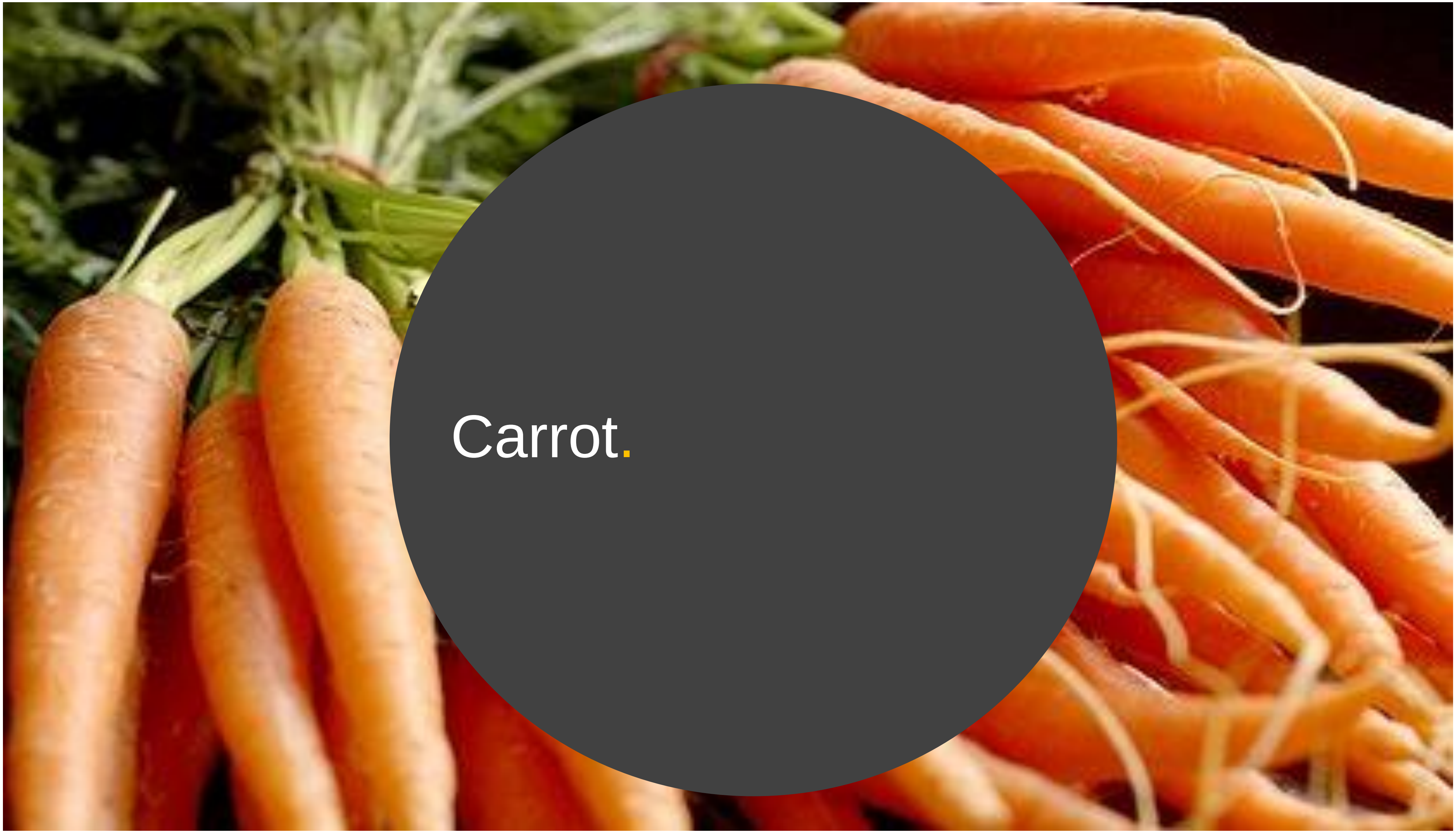
Claims:
Ease of Use, No Additives/Preservatives, Low/No/Reduced Sodium, Low/No/Reduced Sugar

M Vegetarian Vegetable Quarter Pounders (UK)

M Vegetarian Vegetable Quarter Pounders are a blend of seasoned vegetables coated in breadcrumbs. This product is suitable for vegetarians, contains no artificial flavour or colours, and retails in a recyclable 454g pack.

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

Source: Mintel (2014)



Carrot.

Purchase and Consumption Behaviour

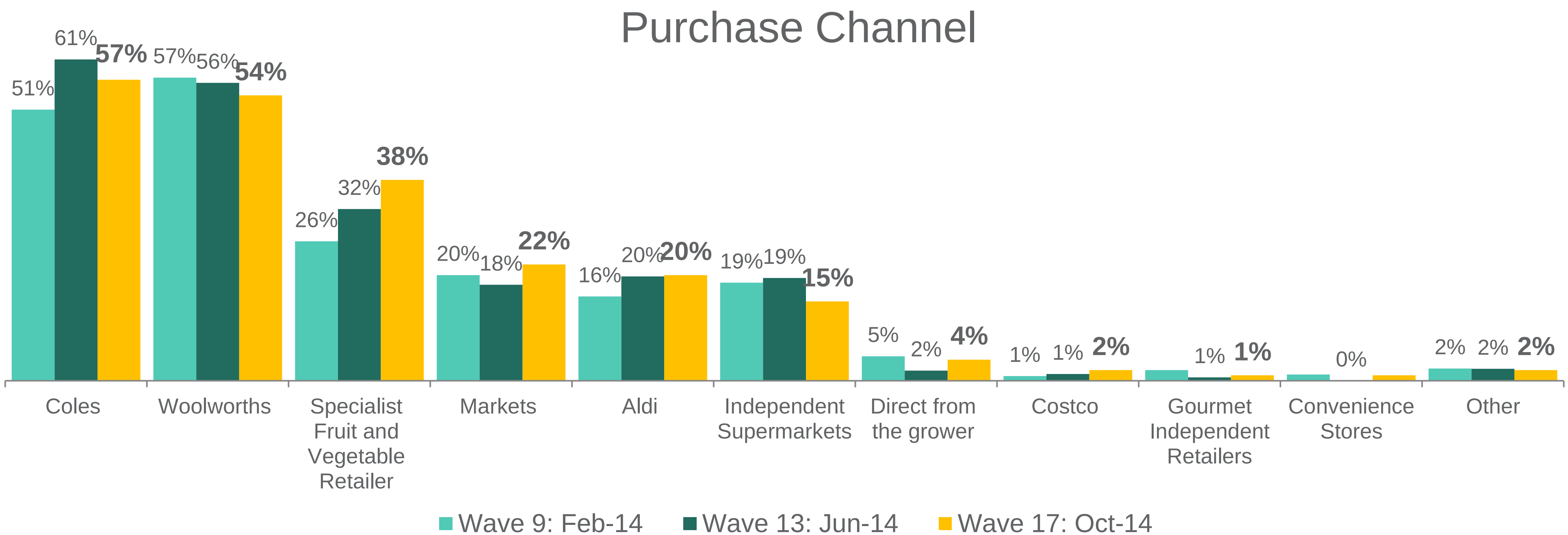
Average Purchase **3.8** times per month

▲ 4.3 times, Wave 9
▲ 4.1 times, Wave 13

Average Consumption **15.5** times per month

▼ 14.2 times, Wave 9
▼ 15.0 times, Wave 13

- Consumption frequency of carrots has increased in Wave 17, while purchase frequency has seen a steady decline since Wave 9.
- Despite a slight drop, Coles remains the key purchase channel for carrots. Purchase from Specialist Fruit and Vegetable Retailers is trending upward.



Q1. On average, how often do you purchase carrot?
Q2. On average, how often do you consume carrot?
Q5. From which of the following channels do you typically purchase carrot?
Wave 9 N=345, Wave 13 N=314, Wave 17 N=306

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	Recalled last spend	Value for money
The typical consumer purchased **1.2kg** of carrots, which was lower than the previous wave.	Recalled last spend on carrots was **$2.40.** This was higher than the previous wave.	Consumer's perceived value for money was good **(7.4/10)** and was higher than the previous waves.
— 1.2kg, Wave 9 ▲ 1.3kg, Wave 13	▲ $2.50, Wave 9 ▼ $2.30, Wave 13	▼ 7.3/10, Wave 9 ▼ 7.3/10, Wave 13

Q3. How much carrot 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
Wave 9 N=345, Wave 13 N=314, Wave 17 N=306

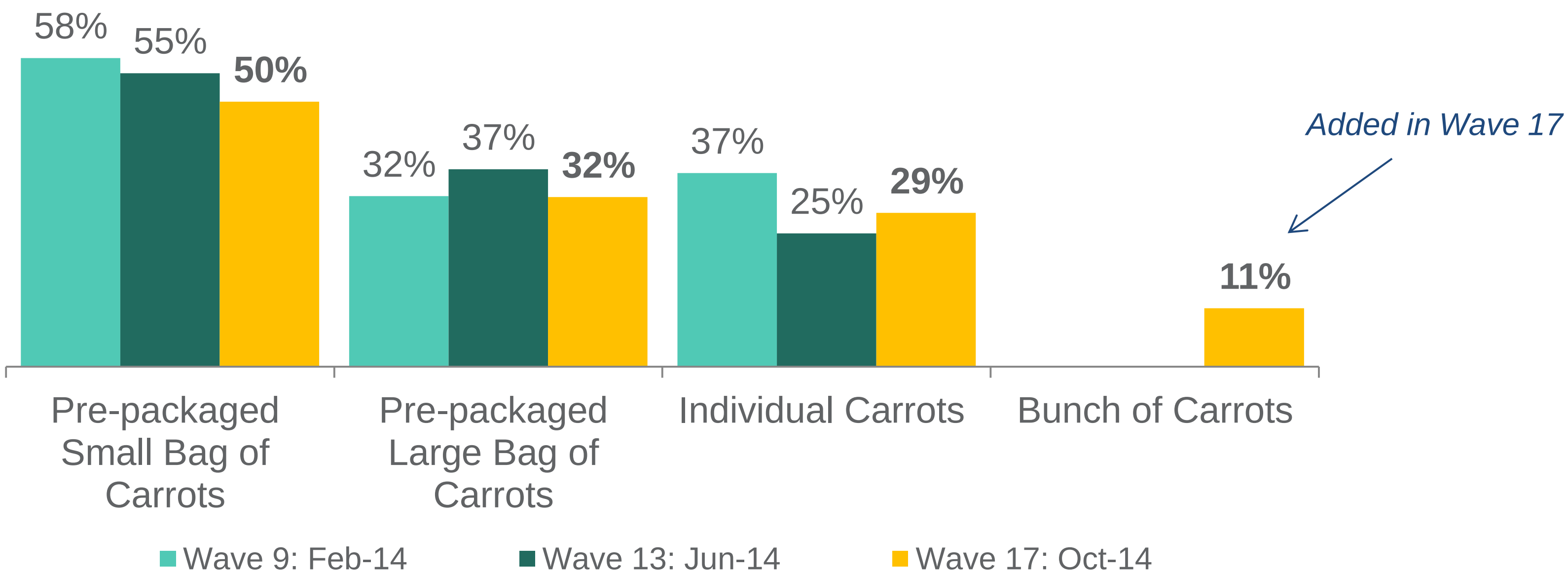
HAL Horticulture Australia

colmar brunton.

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

Pack Formats Purchased

⇛ Small bags of carrots remain the most common format purchased, however less frequently compared with previous months.

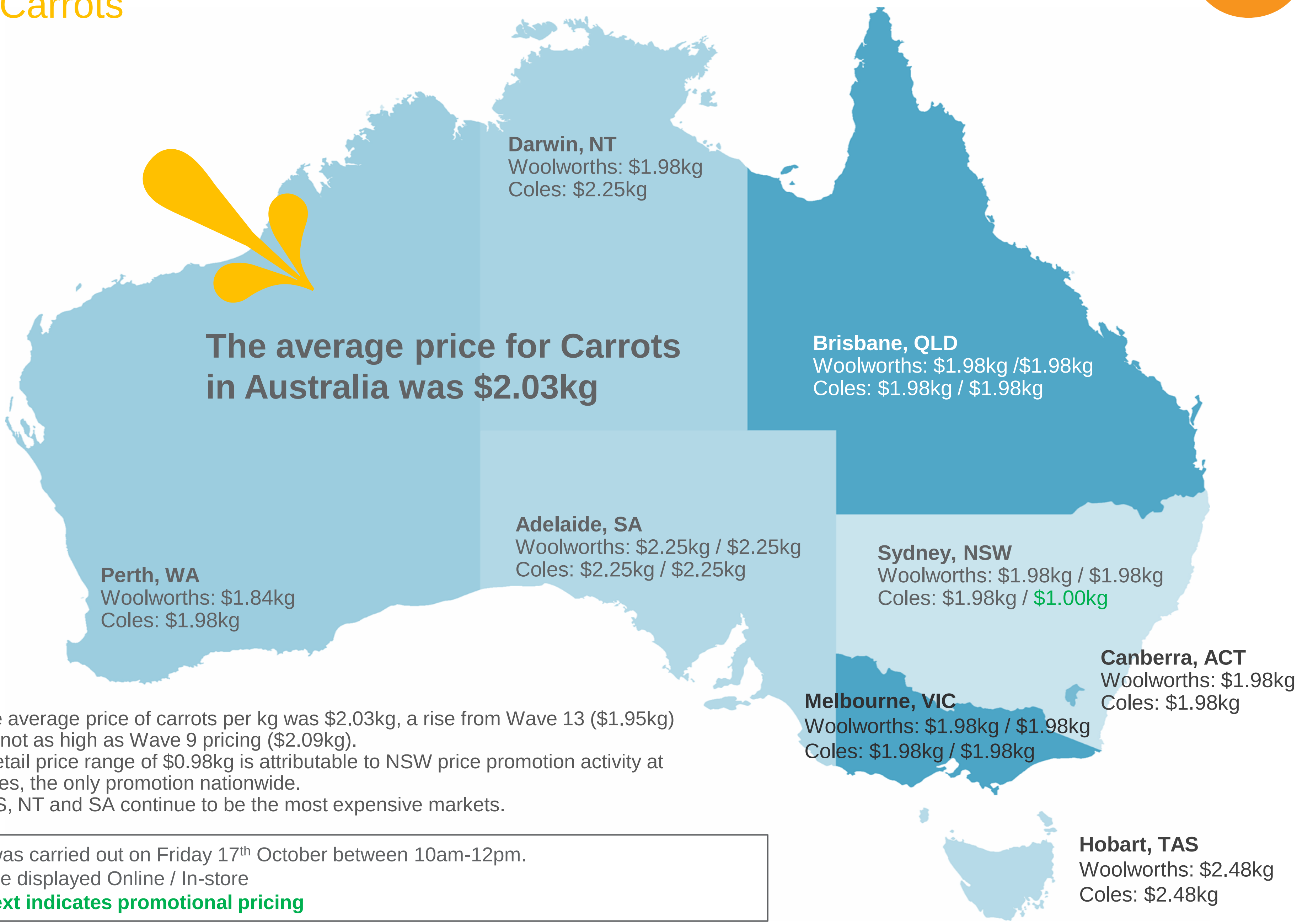


Average number purchased	Small Bag	Individual Carrots	Large Bag	Bunch of Carrots
Wave 9: February 2014	1.8	5.4	1.7	-
Wave 13: June 2014	1.5	5.5	1.5	-
Wave 17: October 2014	1.7	5.1	1.6	2.2

Q3a. How much carrot does this typically equate to?
Wave 9 N=345, Wave 13 N=314, Wave 17 N=306

Online and In-store Commodity Prices

Carrots

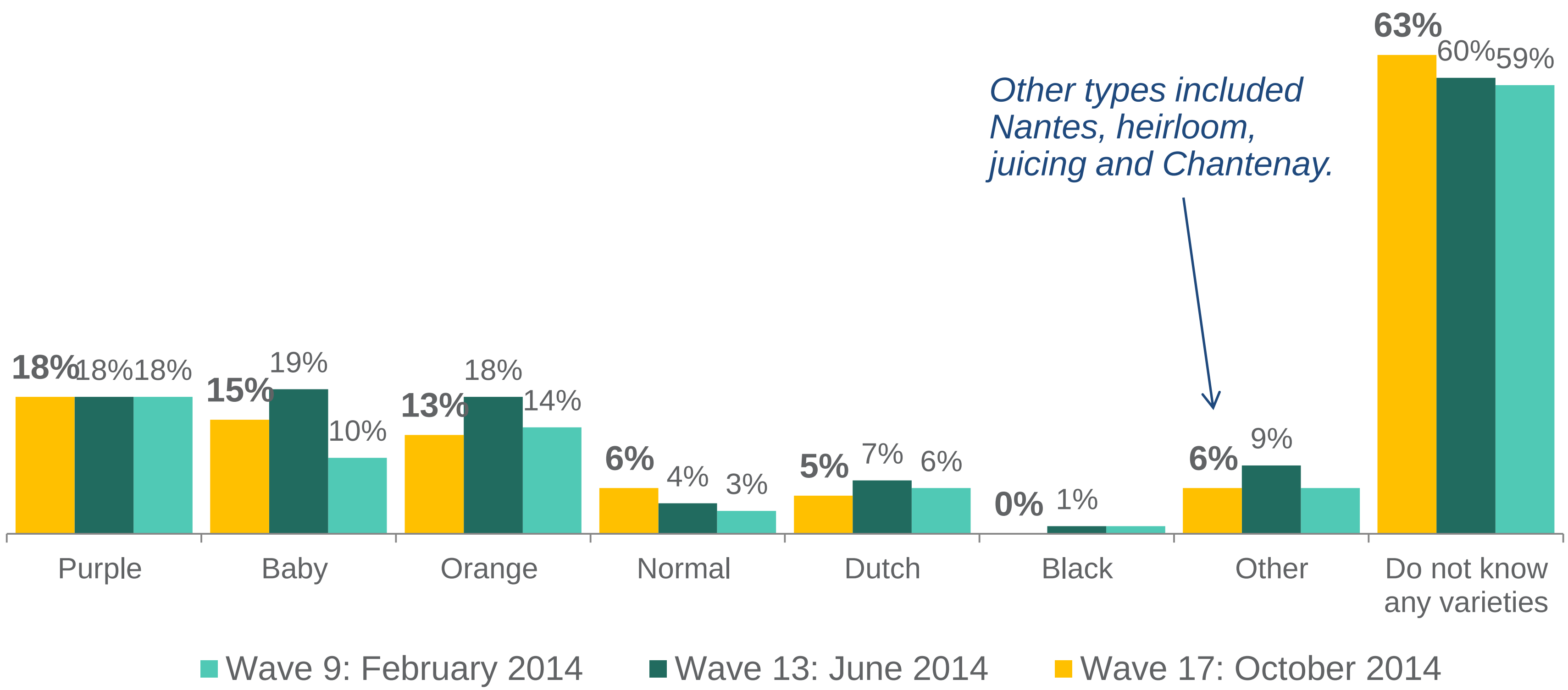


- The average price of carrots per kg was $2.03kg, a rise from Wave 13 ($1.95kg) yet not as high as Wave 9 pricing ($2.09kg).
- A retail price range of $0.98kg is attributable to NSW price promotion activity at Coles, the only promotion nationwide.
- TAS, NT and SA continue to be the most expensive markets.

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

Spontaneous Varietal Awareness

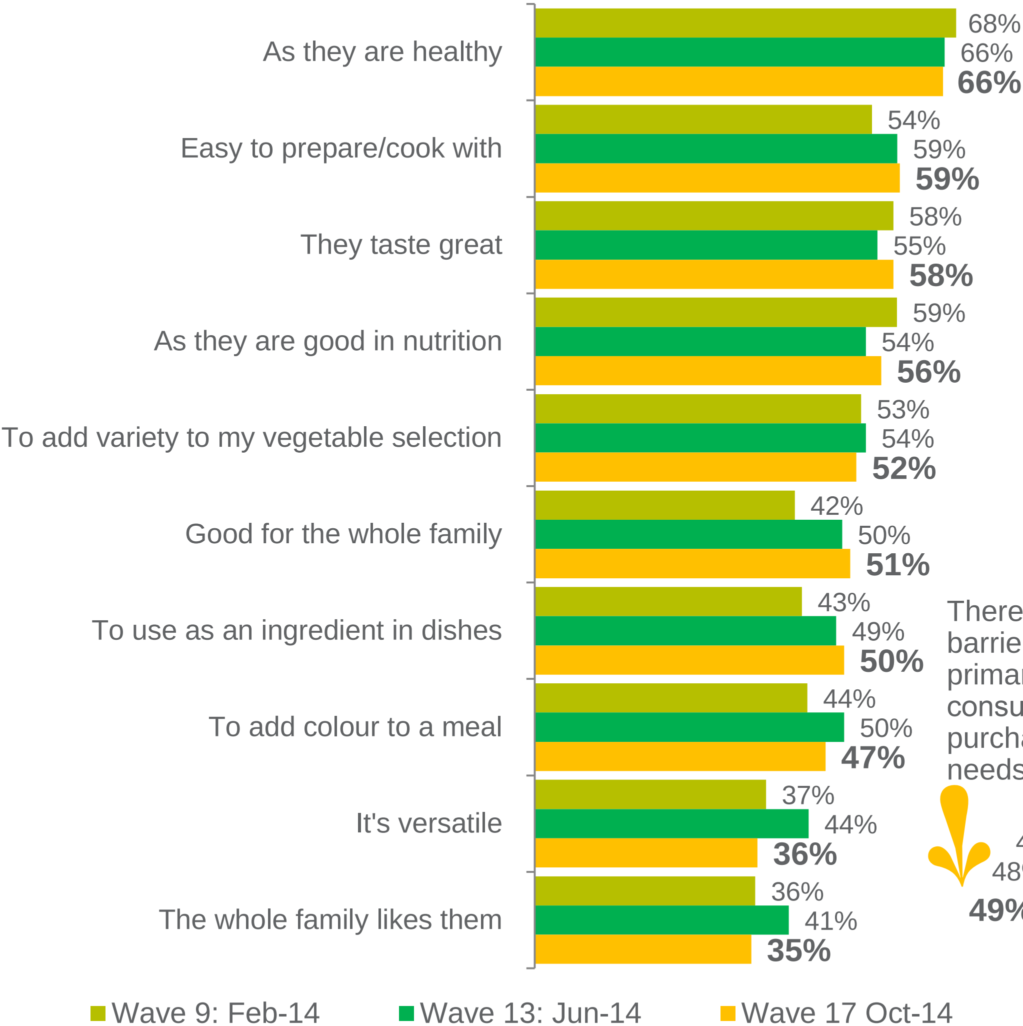
- Purple carrots held the highest awareness of all carrot varieties, following a decline in recall for both baby and orange carrots over the previous wave.
- However, the majority of consumers are still unable to recall a specific type of carrot, which was slightly higher than previous waves.



Q6a. What varieties/types of carrot are you aware of? (unprompted)
Wave 9 N=345, Wave 13 N=314, Wave 17 N=306

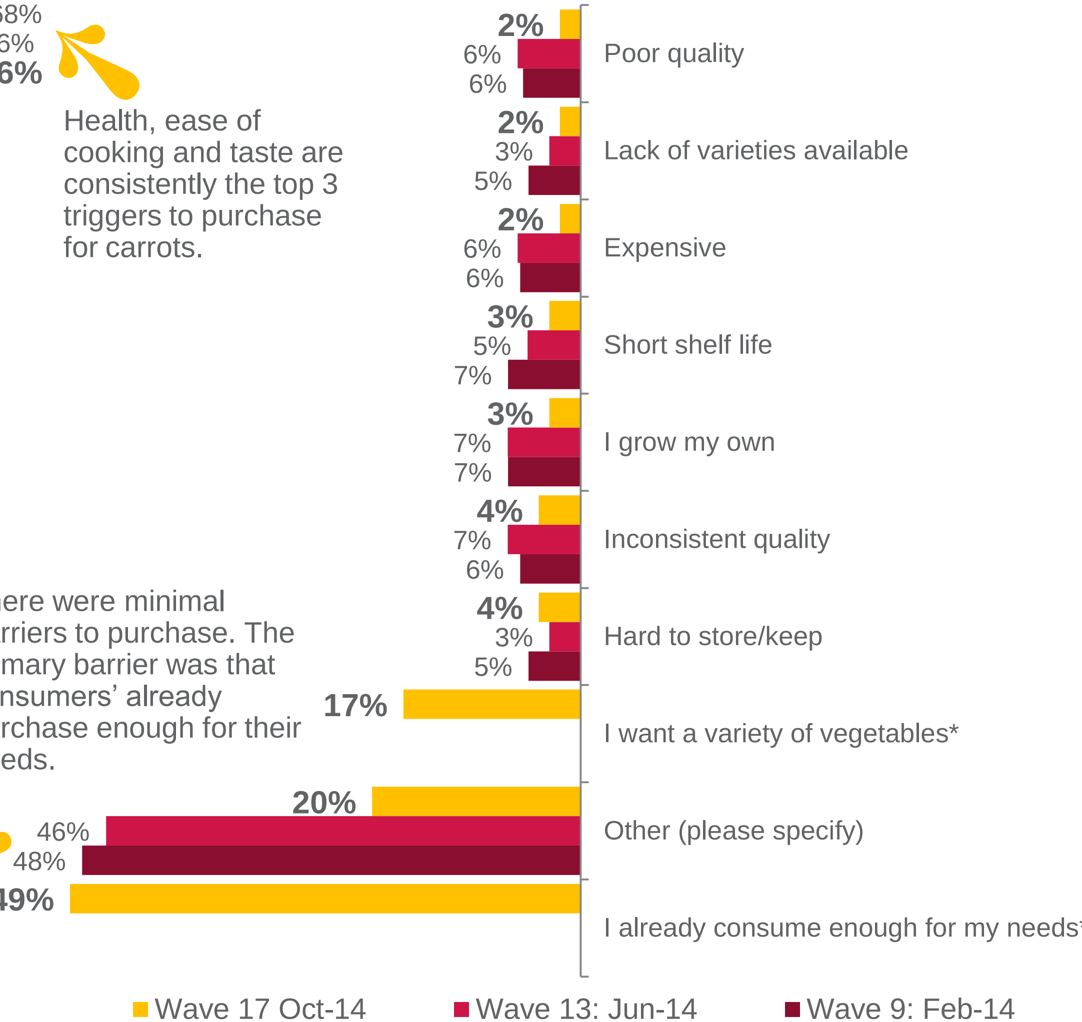
Triggers & Barriers to Purchase

Triggers



Health, ease of cooking and taste are consistently the top 3 triggers to purchase for carrots.

Barriers



There were minimal barriers to purchase. The primary barrier was that consumers' already purchase enough for their needs.

Q7. Which of the following reasons best describes why you purchase carrot?
Q8. Which reason best describes why you don't buy carrot more often?
Wave 9 N=345, Wave 13 N=314, Wave 17 N=306
*New codes added at Wave 17

HAL Horticulture Australia
colmar brunton.

Cooking Cuisine & Occasions

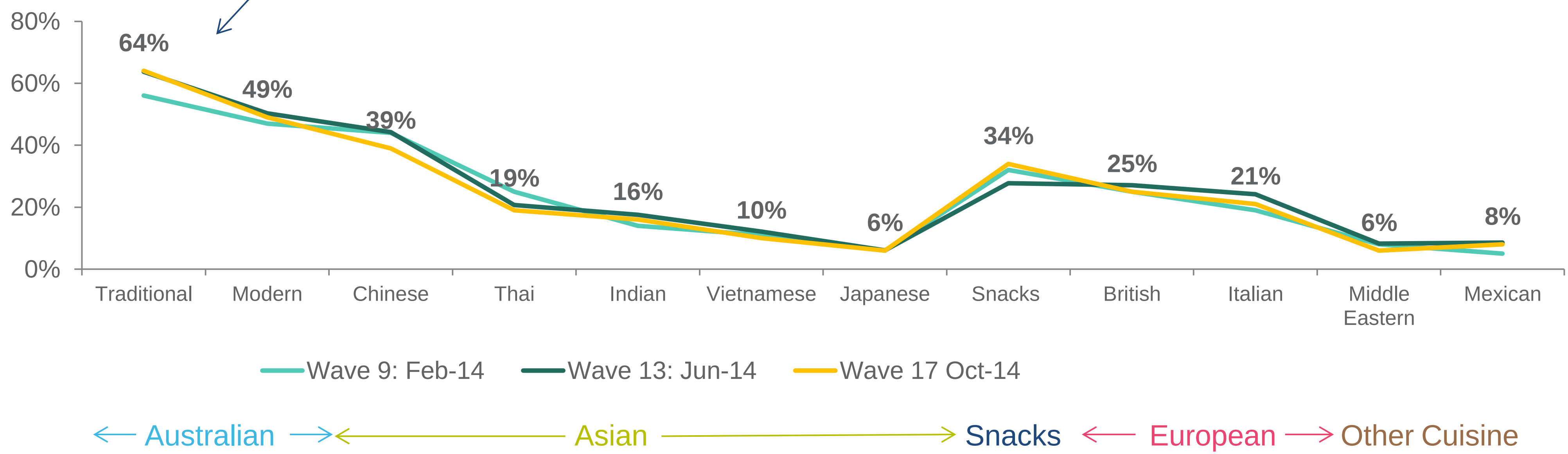
- Overall, cuisine choice was relatively consistent between waves.
- Most consumption occasions for carrots have decreased, with only Every-day consumption and Quick meals increasing or remaining stable compared to Wave 13. `

Wave 17 Top 5 Consumption Occasions

Occasion	Wave 17	Wave 13	Wave 9
Weekday Dinner	61%	▲ 62% Wave 13	▼ 57% Wave 9
Every-day	48%	▼ 46% Wave 13	▼ 44% Wave 9
Weekend Dinner	42%	▲ 46% Wave 13	▲ 43% Wave 9
Family meals	38%	▲ 46% Wave 13	▼ 37% Wave 9
Quick Meals	30%	— 30% Wave 13	▲ 33% Wave 9

Traditional Australian has held gains from Wave 13, after a dip in Wave 9.

Typical Cuisine Cooked



Q10. What cuisines do you cook/consume that use carrot?
Q11. Which of the following occasions do you typically consume/use carrot?
Sample Wave 9 N=345, Wave 13 N=314, Wave 17 N=306
* Indicates significantly higher scores between Waves

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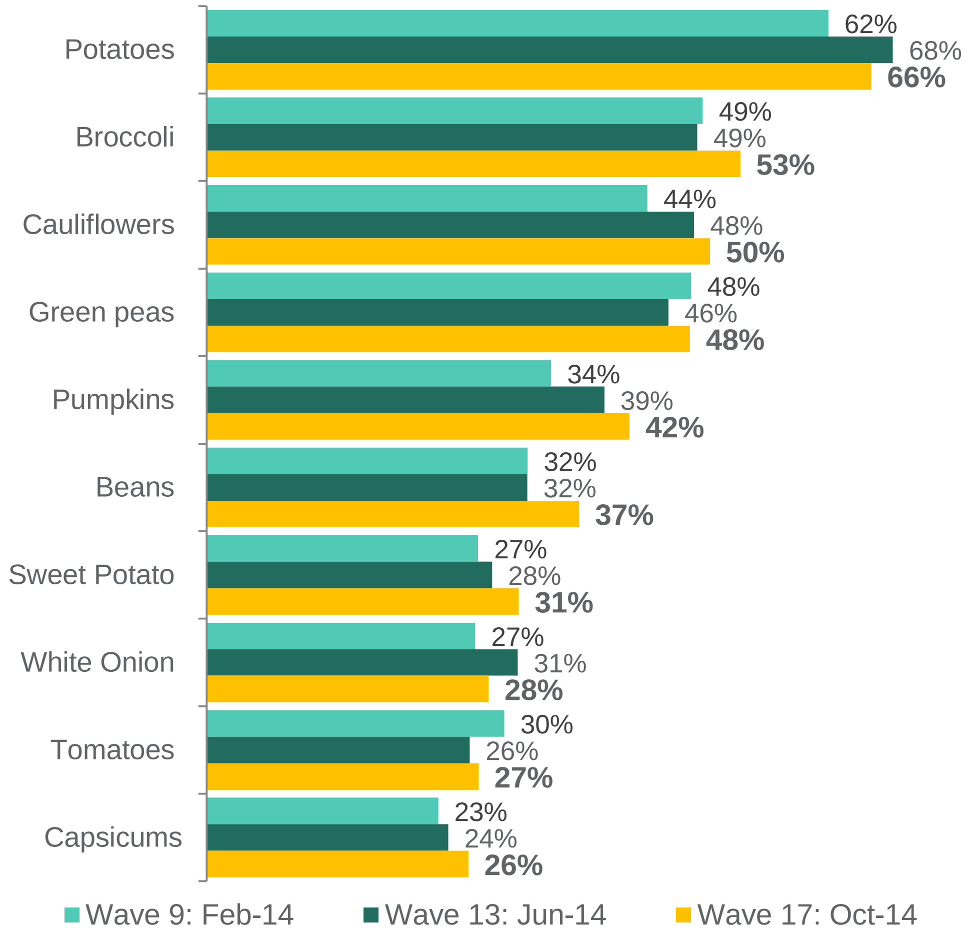
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Cooking Preferences

Top Accompanying Vegetables



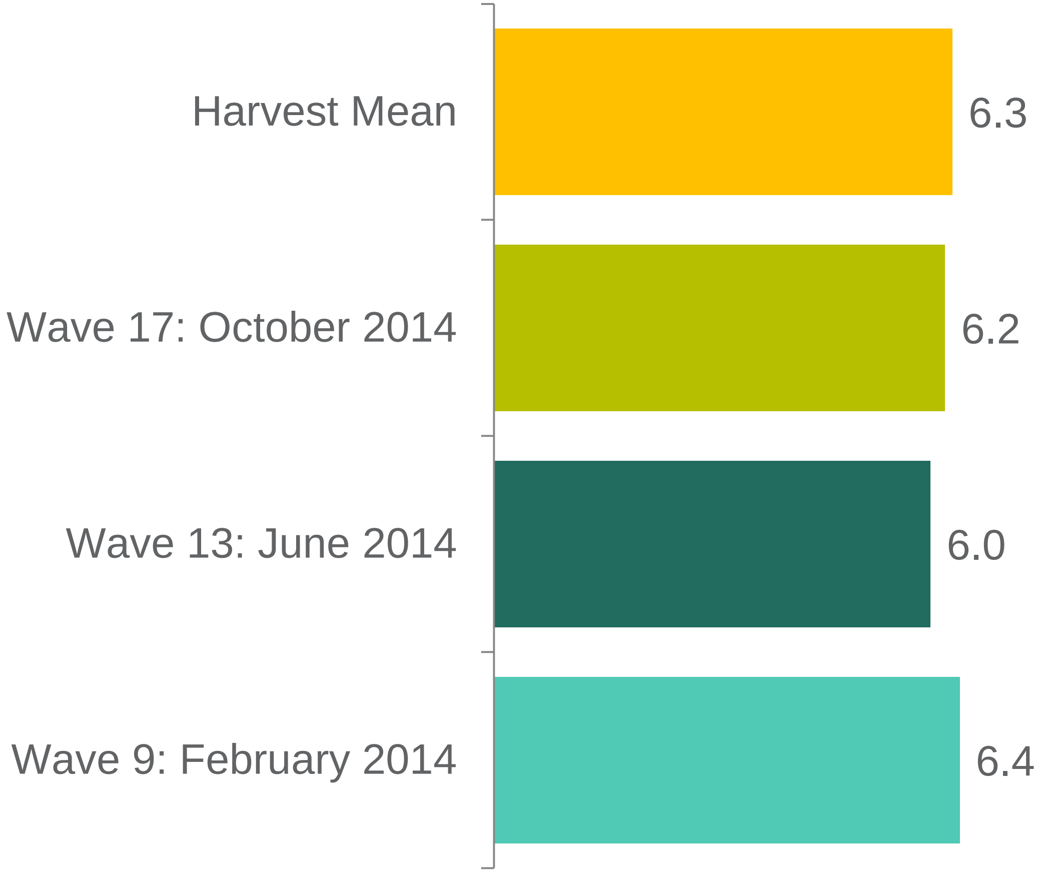
- Carrots were typically consumed with Potatoes, Broccoli and Cauliflowers.
- There was a notable increase in the frequency of consuming carrots Raw, with all other cooking styles declining since Wave 13.

Top 10 Cooking Styles			
	Wave 9	Wave 13	Wave 17
Steaming	54%	51%	50%
Raw	**46%**	**42%**	**49%**
Roasting	48%	50%	46%
Stir frying	46%	52%	43%
Boiling	39%	41%	39%
Soup	32%	37%	28%
Baking	23%	31%	27%
Stewing (slow cooking)	25%	33%	25%
Microwave	27%	27%	23%
Mashing	13%	11%	10%

Q9. How do you typically cook carrot?
Q10a. And when are you serving carrot which of the following do you also serve together with this?
Sample Wave 9 N=345, Wave 13 N=314, Wave 17 N=306

Importance of Provenance

- Importance of provenance in Wave 17 has made gains since the drop in Wave 13, but still sits marginally below the Harvest Mean.



AUSTRALIAN MADE

Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 9 N=345, Wave 13 N=314, Wave 17 N=306

Freshness and Longevity

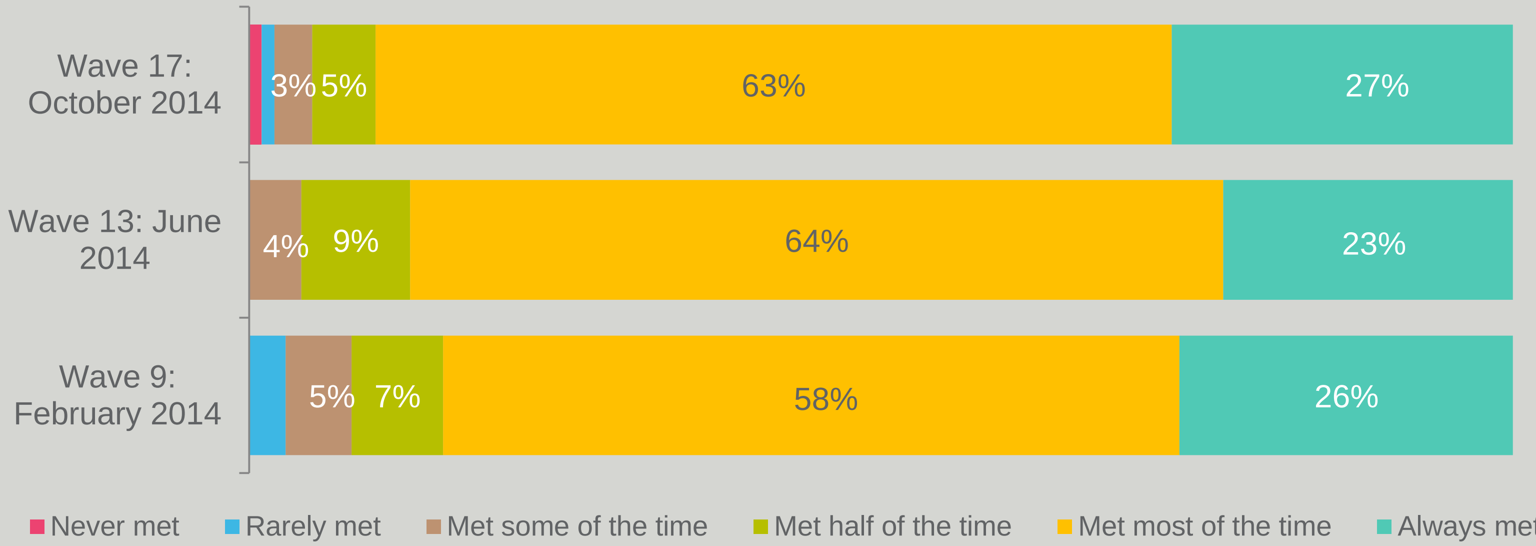
Expected to stay fresh for **12.0** days

▼ 11.9 days, Wave 9

▲ 12.5 days, Wave 13

- Carrots were expected to stay fresh for 12.0 days on average, which was lower than Wave 13, but remains higher than Wave 9.
- Just over a quarter felt that their expectations of freshness were 'always met', while only one in ten felt their expectations are 'met half of the time' or less, showing a downward trend of dissatisfaction over the past two waves.

Expectations Met



Q12. How long do you expect carrots to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy carrots?
Sample Wave 9 N=345, Wave 13 N=314, Wave 17 N=306

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

Carrot Product Launch Trends.

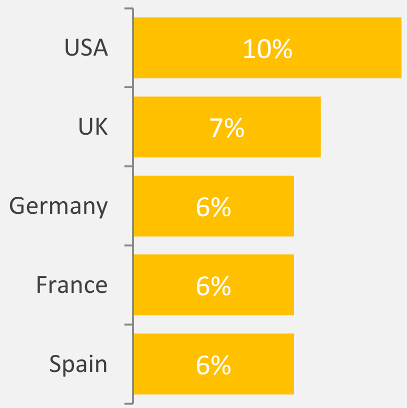
Carrot Global NPDs

August – October 2014

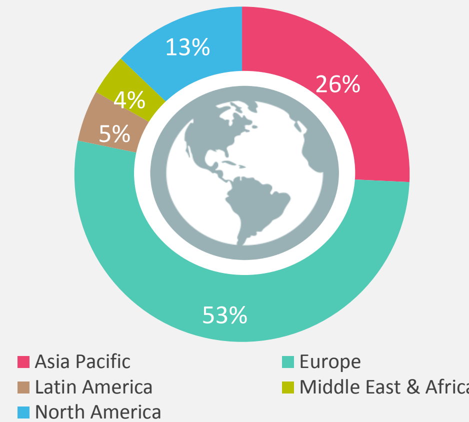
There were 1845 global new products launched over the last 3 months that contained carrot as an ingredient.
The majority of these launches occurred in Europe. Flexible packaging was most common and the key launch category was meals and meal centres.

1845 Global NPDs

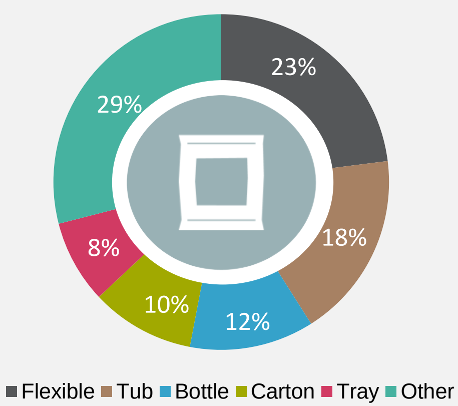
Country



Region



Top Pack Formats



Categories

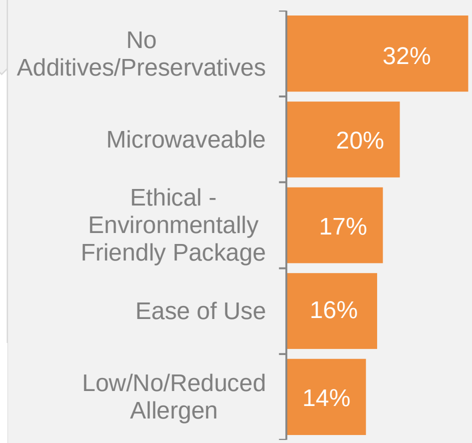
Meals 18%

Soup 11%

Sauces 9%

Dairy 9%

Top Claims



Carrot Product Launches:
Last 3 Months (August – October 2014)
Summary

- A total of 1845 products were launched globally in the last 3 months containing carrot as an ingredient. This was somewhat lower than previous trends.
- There were 35 carrot-containing products launched in Australia in the last quarter, which was marginally lower than the previous quarter. See upcoming slides for examples of Australian launches.
- Europe and the Asia Pacific were the 2 top regions where these products were launched (53% and 26% respectively and on trend with previous quarters). However, this was diversified across countries.
- Pack formats typically used were flexible formats (23%) and tubs (18%).
- The top categories for product launches were meals (18%), soups (11%), sauces (9%) and diary (9%).
- The top claims used for launches globally were around health; no additive/ preservatives (29%), microwavable (20%) and ethical - environmentally friendly (17%).
- The most innovative launches found were; Carrot Facial Scrub found in South Africa and Mighty Puff 'Ems Cheesy Broccoli Carrot Snacks found in USA . Examples of these products can be found at the end of the carrot trend report.

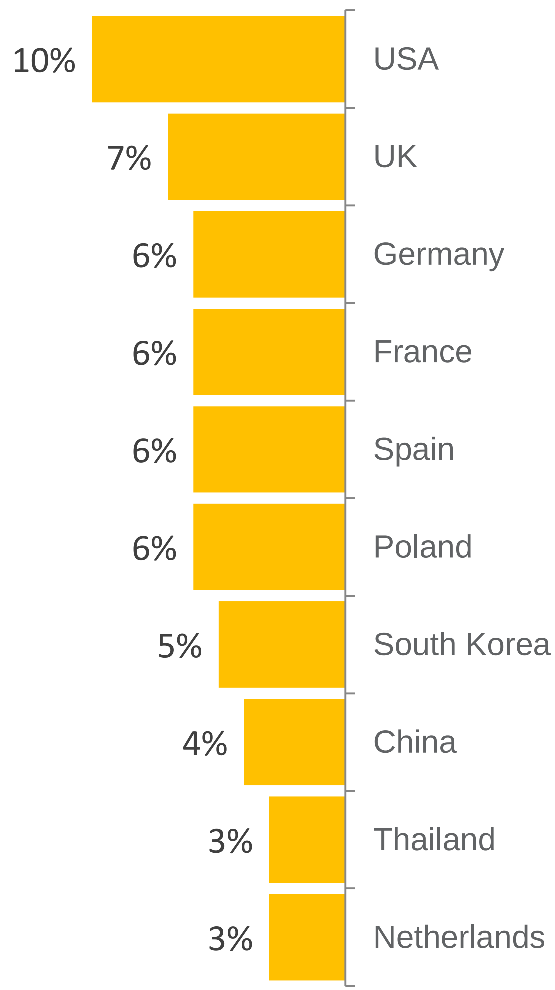
Source: Mintel (2014)

Carrot Launches

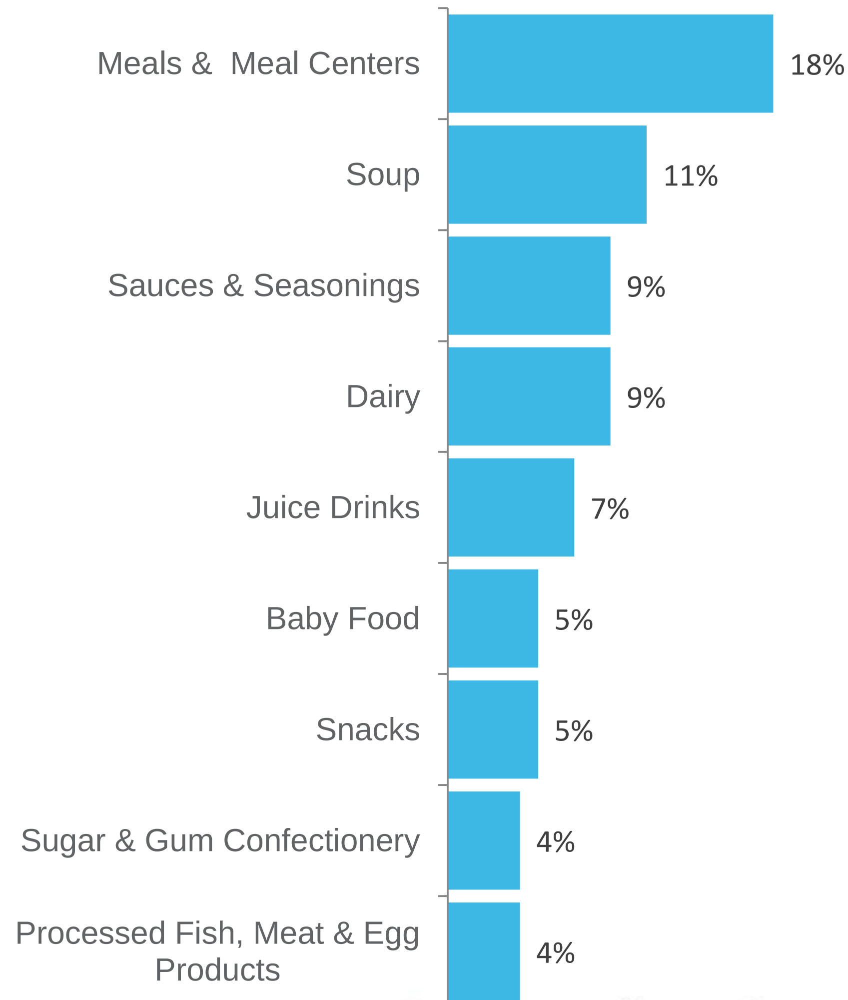
Country, Region & Categories

- The most active countries for launches in the last three months were USA, UK and Germany.
- Meals remained the most common category for launches, followed by soup, sauces and dairy.

Top Launch Countries



Top Launch Categories



1845 Global Launches

Number of Global Carrot NPD for the L3M N=1845

HAL Horticulture Australia

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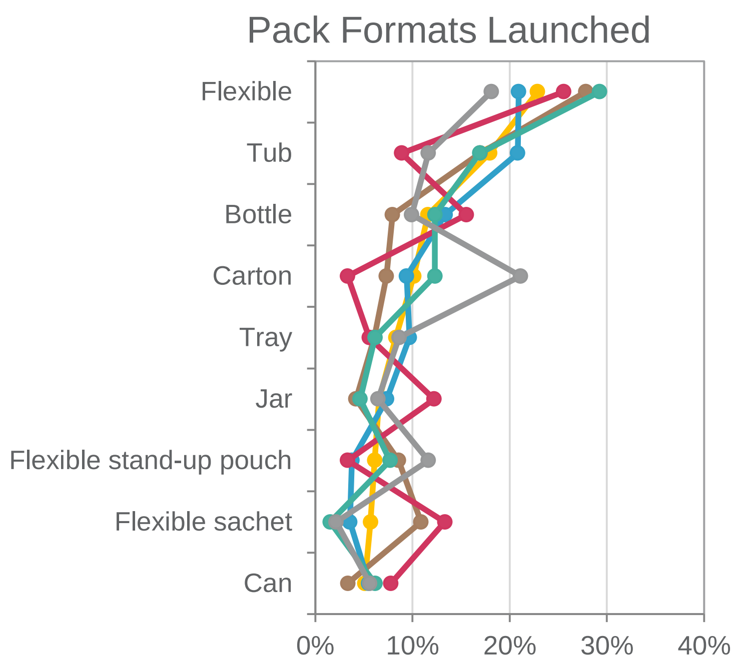
Carrot Launches

Top Claims & Pack Formats Used

- Flexible packaging and tubs were the most common pack formats.
- Key claims used were situated around health, including no additive/ preservatives, microwavable and ethical - environmentally friendly. These claims were more commonly used in North America.



Number of Global Carrot NPD for the L3M N=1845

Innovative Carrot Launches:
L3M (August – October 2014)

Batchelors Super Rice Golden Vegetable Flavour Rice (UK)

Batchelors Super Rice Golden Vegetable Flavour Rice has been repackaged in a family pack It is made with long grain rice with a tasty mix of red paper, peas, carrots, onion, sweetcorn and green beans.

Claims:
No Additives/Preservatives, Vegetarian, Microwaveable

Zumosol Light Multi Fruit Nectar (Spain)

Zumosol Light Néctar de Multifruta (Multi Fruit Nectar) is a source of vitamin C and contains 30% less sugars compared to other nectars. The gluten-free product retails in a 2L pack, bearing the FSC logo.

Claims:
Gluten-Free, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Package, Slimming, Low/No/Reduced Sugar

Nokyo Yasai Days Vegetable Juice (Japan)

Nokyo Yasai Days Vegetable Juice is reformulated and repackaged. It now contains 36 vegetables, and has refreshing, easy-drinking flavour. It retails in a 200ml carton.

Claims:
N/A

Charal Beef Bourguignon (France)

Plum Organics Pear, Blueberry & Purple Carrot Organic Baby Food (Stage 2) is suitable for babies between six months and up. This USDA organic certified baby food is free from genetically modified ingredients and artificial ingredients. It is made with unsweetened and unsalted ingredients. The kosher certified product retails in a 128ml BPA-free pack.

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

Source: Mintel (2014)

Innovative Carrot Launches:
L3M (August – October 2014)

7 Fresh Jade Dragon Vegetable Gyoza (Thailand)

7 Fresh Jade Dragon Vegetable Gyoza has been repackaged. This microwaveable product is suitable for vegetarians and retails in an 100g pack containing five units.

Claims:
Vegetarian, Microwaveable

Betty Crocker Super Moist Carrot Cake Mix (Malaysia)

Betty Crocker Super Moist Carrot with Imitation Carrot Flavoured Pieces Cake Mix has been repackaged in a newly designed 432g recyclable pack. This product is kosher certified.

Claims:
Ethical - Charity, Ethical - Environmentally Friendly Package, Kosher

Oktoberfest German Style Carrot Salad (Germany)

Oktoberfest German Style Carrot Salad is 99% fat free and does not contain artificial colours, flavours or preservatives. This product retails in a 330g pack.

Claims:
No Additives/Preservatives, Seasonal, Vegan, Low/No/Reduced Fat, No Animal Ingredients, Vegetarian

Athina Apple, Orange and Carrot Fresh Juice (Malaysia)

Athina Apple, Orange and Carrot Fresh Juice is 100% pure squeezed fruit without added water or sugar. This 100% natural juice is not from concentrate to keep all its ingredients and unique taste, and is free from preservatives, sweeteners, artificial colours and gluten. The product retails in a 1L pack.

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

Source: Mintel (2014)

Innovative Carrot Launches:
L3M (August – October 2014)

Odes'kyy Konservnyy Zavod Dytyachoho Kharchuvannya (Apple-Carrot Juice (Ukraine)

Odes'kyy Konservnyy Zavod Dytyachoho Kharchuvannya Chudo Chado Sik Yabluchno-Morkovny (Apple-Carrot Juice) is specially formulated for babies aged six months and over. This sterilised juice is made from locally sourced fruits and vegetables that are not from concentrate.

Claims:
Ethical - Environmentally Friendly Package, No Additives/Preservatives, Babies & Toddlers (0-4), GMO-Free

FJ Fennel Carrot Facial Scrub (South Africa)

FJ Fennel Carrot Facial Scrub is described as a nourishing, moisturising and antioxidant facial scrub rich in natural carrot oil, to gently polish and exfoliate the surface layers of the skin, uncovering a healthy, soft, glowing and radiant complexion. The product retails in a 150ml pack.

Claims:
Botanical/Herbal, Brightening / Illuminating*, Exfoliating, Antioxidant, Moisturising / Hydrating

Plum Organics Mighty Puff 'Ems Cheesy Broccoli Carrot Snacks (USA)

Plum Organics Mighty Puff 'Ems Cheesy Broccoli Carrot Organic Puffed Whole Grain Snacks are now available. This USDA certified product contains vitamins, minerals, and whole grains, is kosher dairy certified, and is made just right for little hands to make it easy to nibble.

Claims:
Ease of Use, GMO-Free, Kosher, Ethical - Environmentally Friendly Package, Ethical - Charity, Organic, Babies & Toddlers (0-4), Wholegrain

Leezen Organic Carrot Blend Juice Drink (Taiwan)

Leezen Organic Carrot Blend Juice Drink is made with whole organic carrot and maintains original taste and fiber. The product is free from artificial flavour, colouring, colour retention agent and preservatives. It is CAS Organic and TOC certified, and retails in a 950ml pack.

Claims:
No Additives/Preservatives, Organic

Source: Mintel (2014)

Top Australian Carrot Launches:
L3M (August – October 2014)

Woolworths Select Low Fat Homestyle Chicken & Vegetable Dip

Woolworths Select Heat & Serve Hearty Beef & Vegetables Soup

Asian Home Gourmet Chinese Hot & Sour Instant Noodle Soup

Coles Cuisine Beef Ravioli

Woolworths Select Smokey Bacon & Lentils Soup

Sue Shepherd Slow Cooked Vegetable Stock

Lean Cuisine Malaysian Chicken Laksa Soup

Super Nature Super Foods Chicken, Asparagus and Pearl Barley Risotto

Imperial Grain Egg Fried Rice

Five Brothers Raphael's Bolognese Sauce

Happy Baby Hearty Meals Super Salmon Baby Food

Patties Party Pasties

Source: Mintel (2014)


Cauliflower.

Purchase and Consumption Behaviour

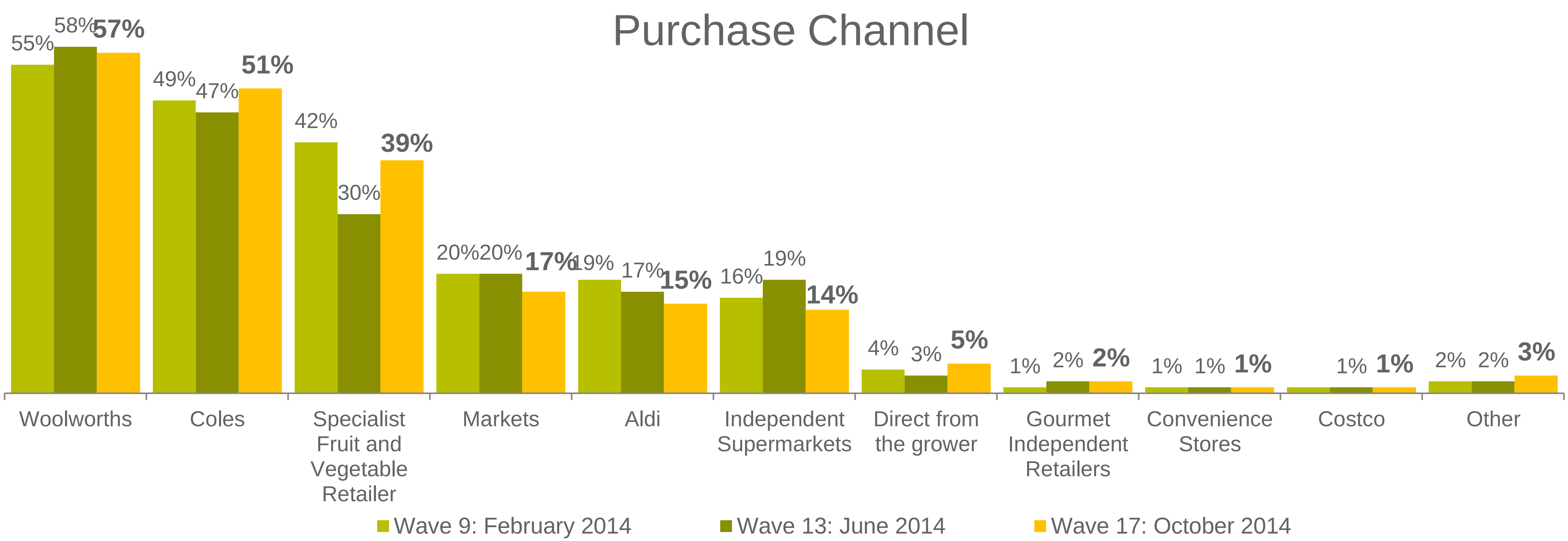
Average Purchase **3.4** times per month

▼ 2.9 times, Wave 13
▼ 3.0 times, Wave 9

Average Consumption **9.0** times per month

▼ 7.7 times, Wave 13
▼ 7.8 times, Wave 9

- Purchase and consumption frequency has increased over the previous waves.
- Key purchase channels were mainstream retailers, however there has been a directional downturn of purchase from Aldi.
- Over the last three waves the greatest fluctuation in purchase channel was through specialist retailers.



Q1. On average, how often do you purchase cauliflower?
Q2. On average, how often do you consume cauliflower?
Q5. From which of the following channels do you typically purchase cauliflower?
Sample Wave 9 N=316, Wave 13 N=309, Wave 17 N=302

HAL Horticulture Australia · colmar brunton.

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

Average Spend & Price Sensitivity

Average weight of purchase

The typical consumer purchased **1.1kg** of cauliflower, consistent with all previous waves.

▼ 1.0kg, Wave 9

▼ 1.0kg, Wave 13

Recalled last spend

Recalled last spend on cauliflower was **$3.10,** this is consistent with previous months.

▲ $3.20, Wave 9

— $3.10, Wave 13

Value for money

Consumers' perceived value for money was fair **(6.1/10).** Value for money is in line with past months.

— 6.1/10, Wave 9

▲ 6.0/10, Wave 13

Q3. How much cauliflower 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 9 N=316, Wave 13 N=309, Wave 17 N=302

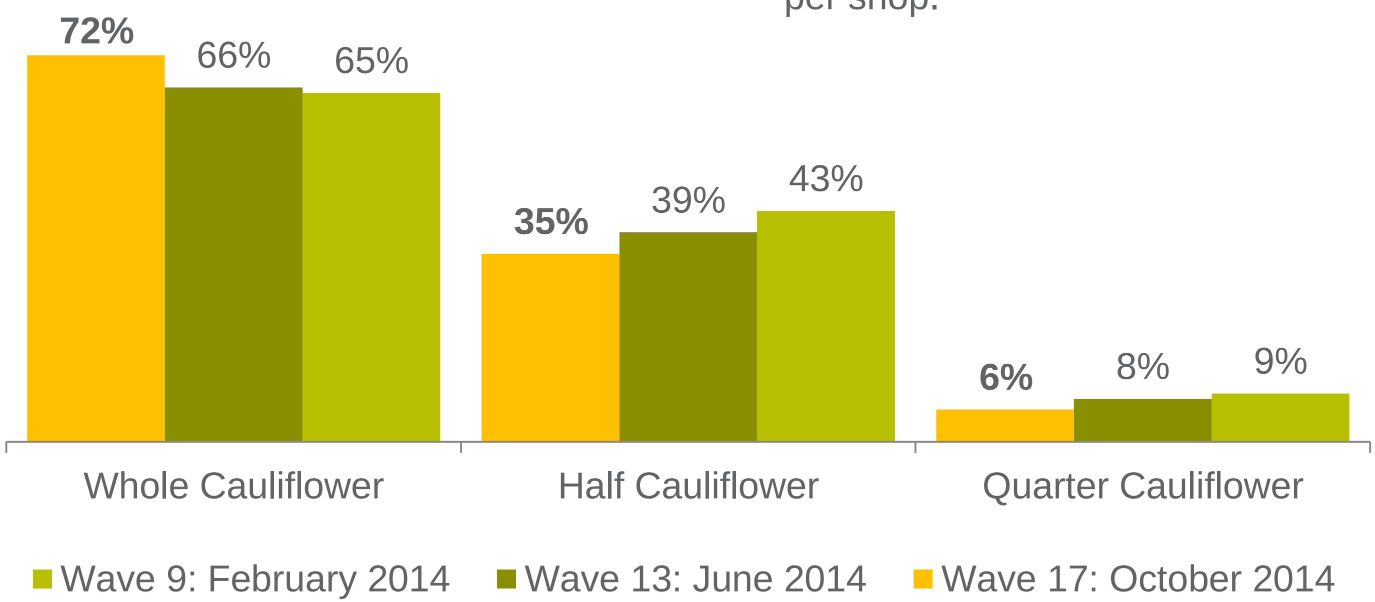
HAL Horticulture Australia

colmar brunton.

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

Pack Formats Purchased

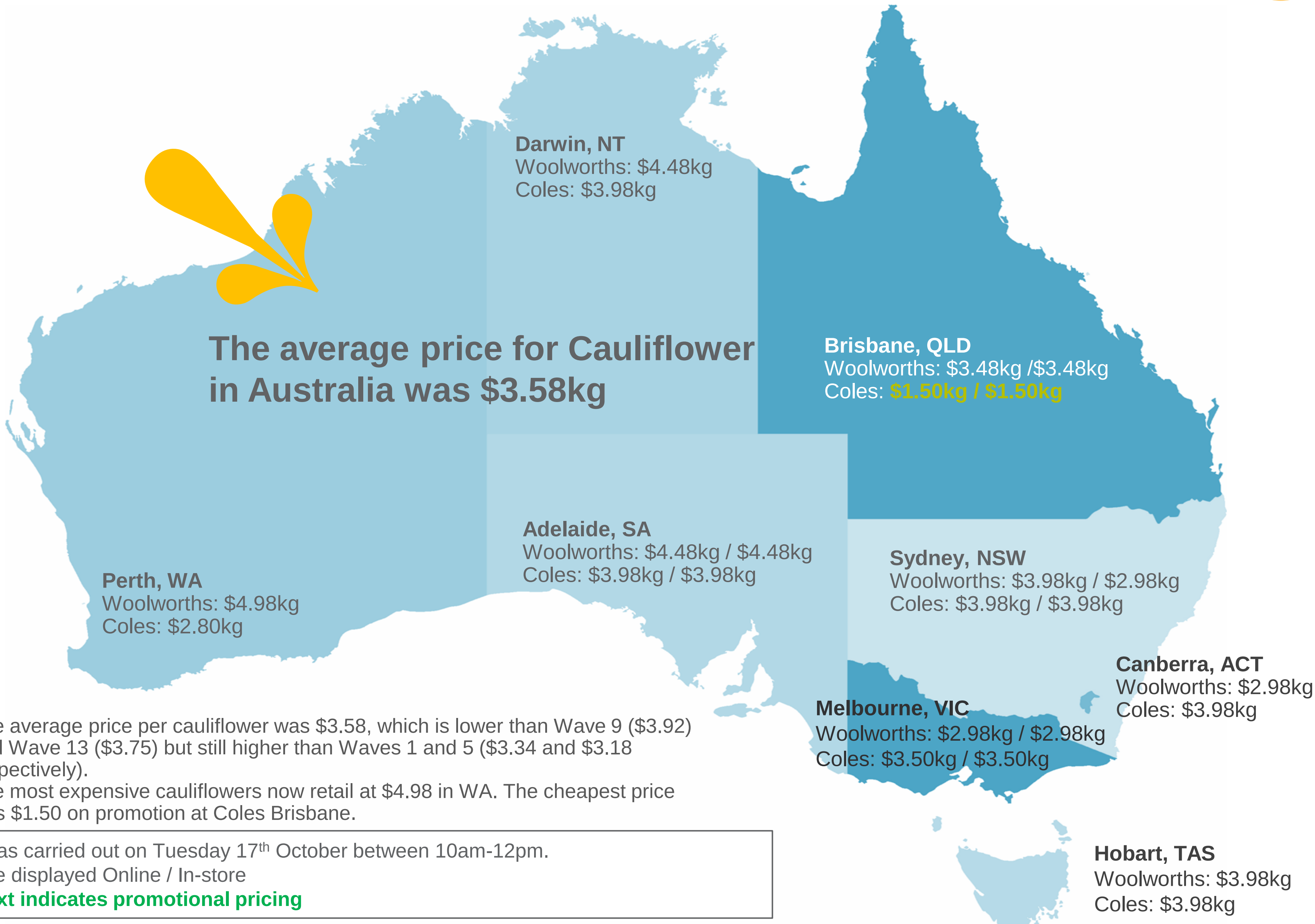
- Whole cauliflower remains the most common format purchased. Typically one head is purchased per shop.



Average number purchased	Whole	Half	Quarter
Wave 9: February 2014	1.2	1.2	2.2
Wave 13: June 2014	1.1	1.1	1.7
Wave 17: October 2014	1.1	1.1	1.6

Q3a. How much cauliflower does this typically equate to?

Online and In-store Commodity Prices

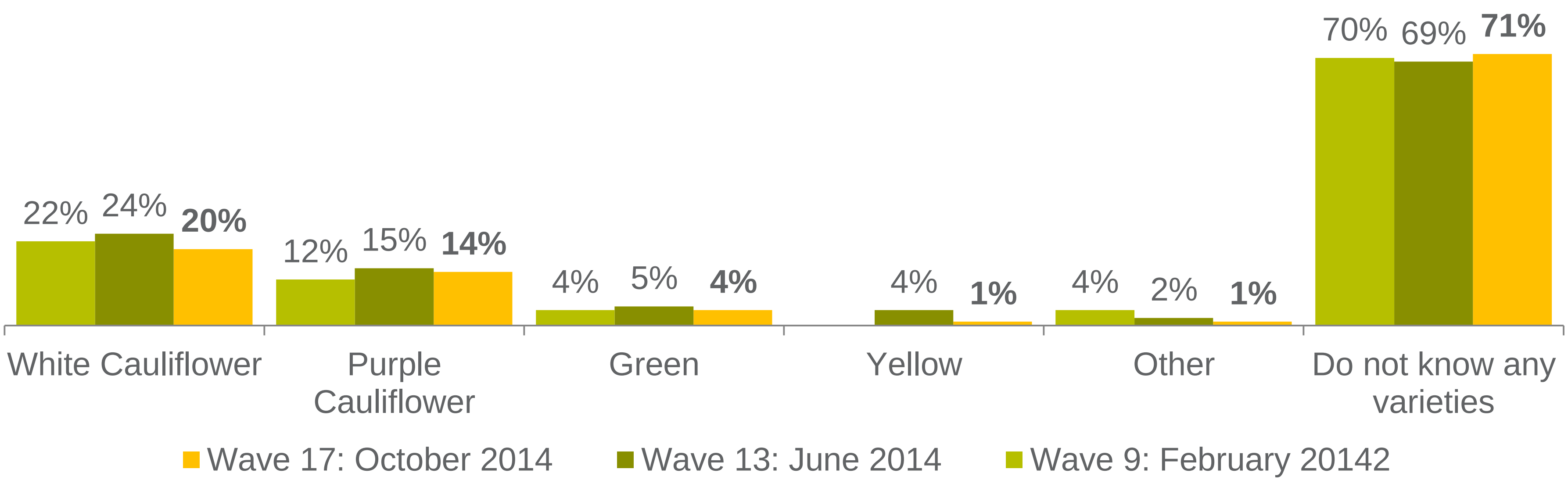


- The average price per cauliflower was $3.58, which is lower than Wave 9 ($3.92) and Wave 13 ($3.75) but still higher than Waves 1 and 5 ($3.34 and $3.18 respectively).
- The most expensive cauliflowers now retail at $4.98 in WA. The cheapest price was $1.50 on promotion at Coles Brisbane.

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

Spontaneous Varietal Awareness

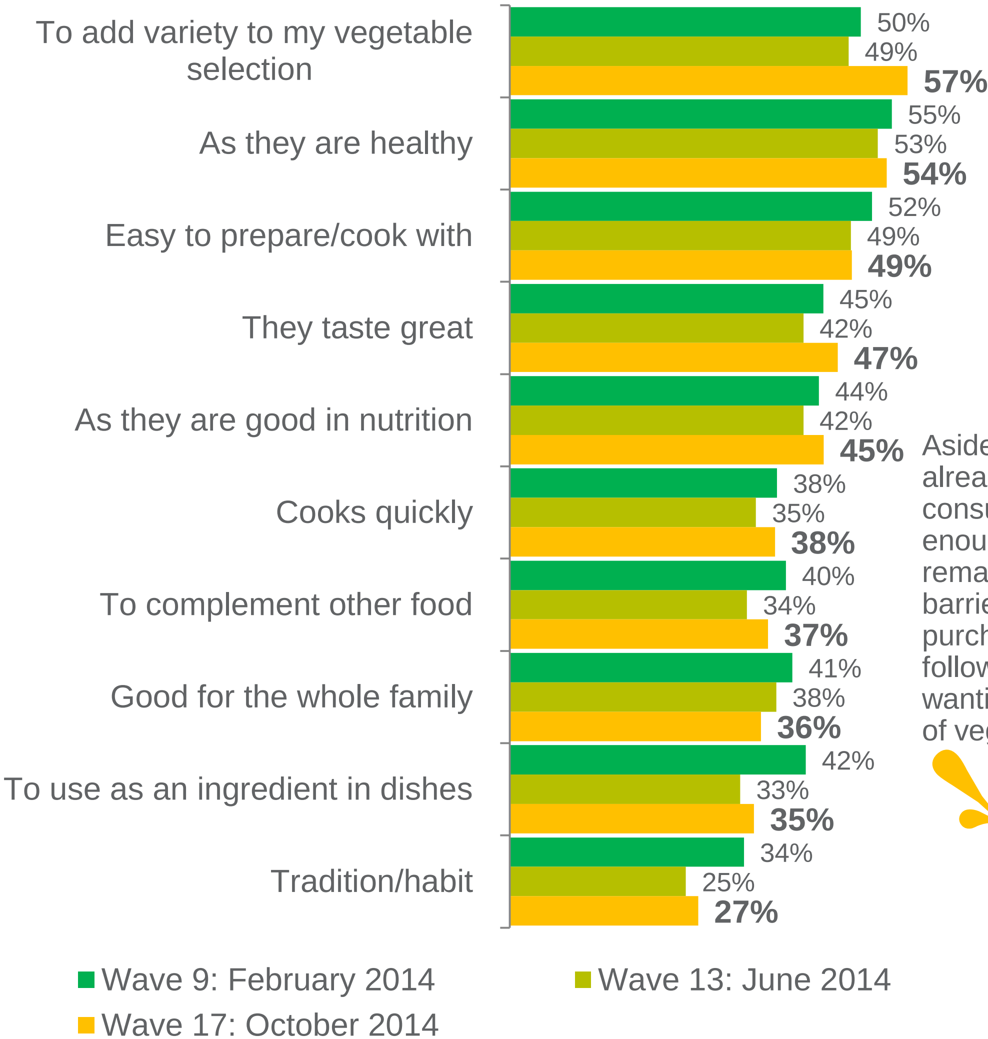
- Low recall of varieties is consistent with previous trends, with the majority of consumers unable to recall a type.
- Colour remains the primary driver of awareness, with white and purple types most recalled.



Q6a. What varieties of cauliflower are you aware of? (unprompted)
Sample Wave 9 N=316, Wave 13 N=309, Wave 17 N=302

Triggers & Barriers to Purchase

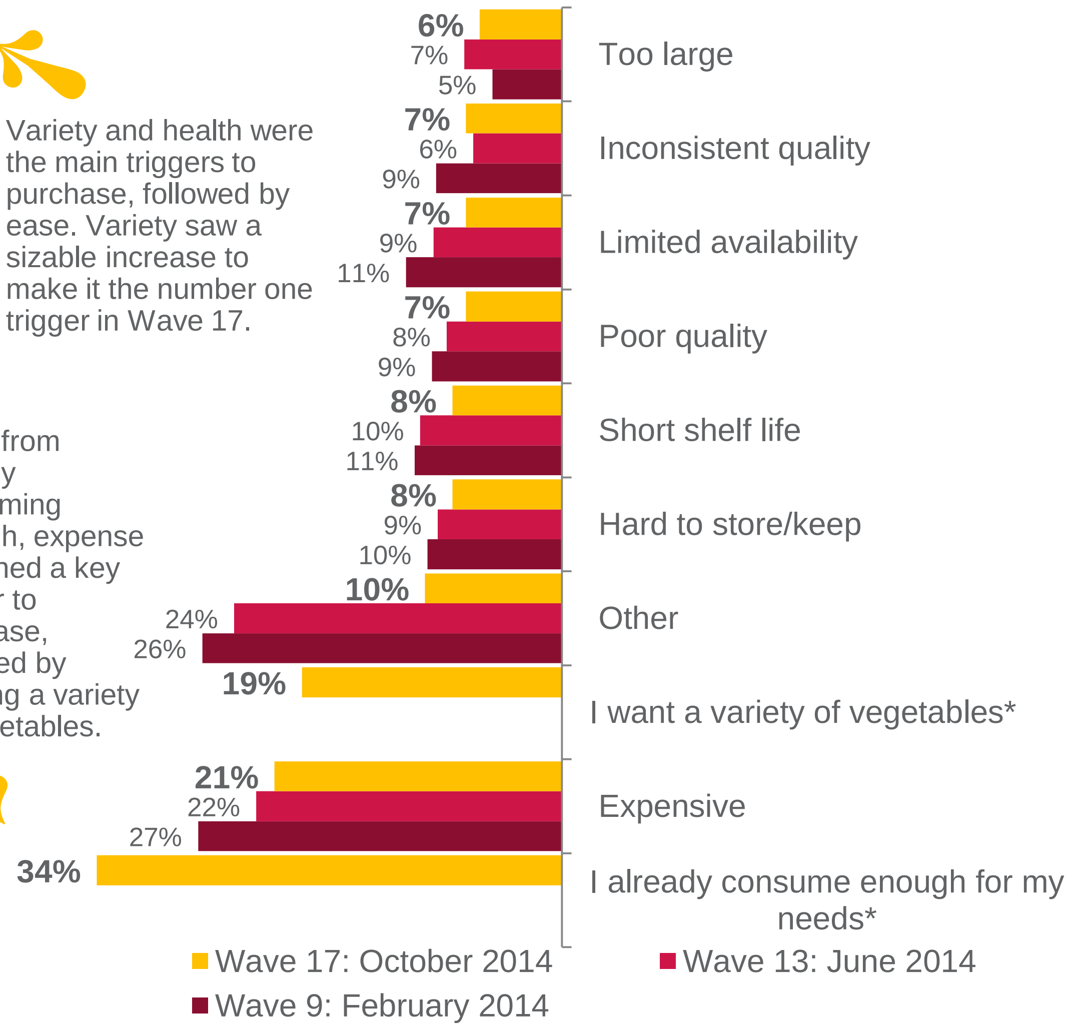
Triggers



Variety and health were the main triggers to purchase, followed by ease. Variety saw a sizable increase to make it the number one trigger in Wave 17.

Aside from already consuming enough, expense remained a key barrier to purchase, followed by wanting a variety of vegetables.

Barriers



Q7. Which of the following reasons best describes why you purchase cauliflower?
Q8. Which reason best describes why you don't buy cauliflower more often?
Sample Wave 9 N=316, Wave 13 N=309, Wave 17 N=302
*New codes added at Wave 17

HAL Horticulture Australia

colmar brunton.

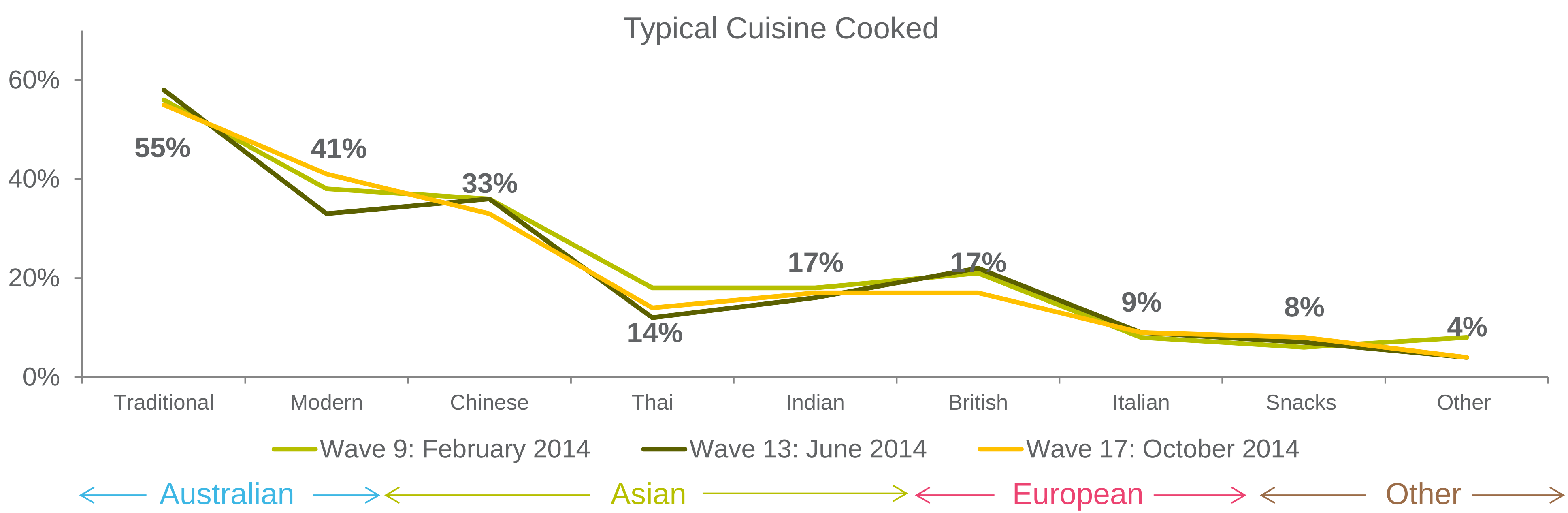
Cooking Cuisine and Occasions

- Traditional Australian cuisine remains the most popular cuisine for Cauliflower. There has been an increase in the popularity of Modern Australian cuisine after decreases over the last three waves.

- Dinner is consistently the main occasion for consumption, primarily during weekdays.

Wave 17 Top 5 Consumption Occasions

Weekday Dinner	64%	▼ 60% Wave 13	▼ 60% Wave 9
Weekend Dinner	38%	— 38% Wave 13	▲ 40% Wave 9
Every-day	32%	▼ 29% Wave 13	▼ 27% Wave 9
Family meals	37%	▲ 39% Wave 13	▼ 36% Wave 9
Quick Meals	17%	▲ 18% Wave 13	▲ 21% Wave 9



Q10. What cuisines do you cook/consume that use cauliflower?
Q11. Which of the following occasions do you typically consume/use cauliflower?
Sample Wave 9 N=316, Wave 13 N=309, Wave 17 N=302

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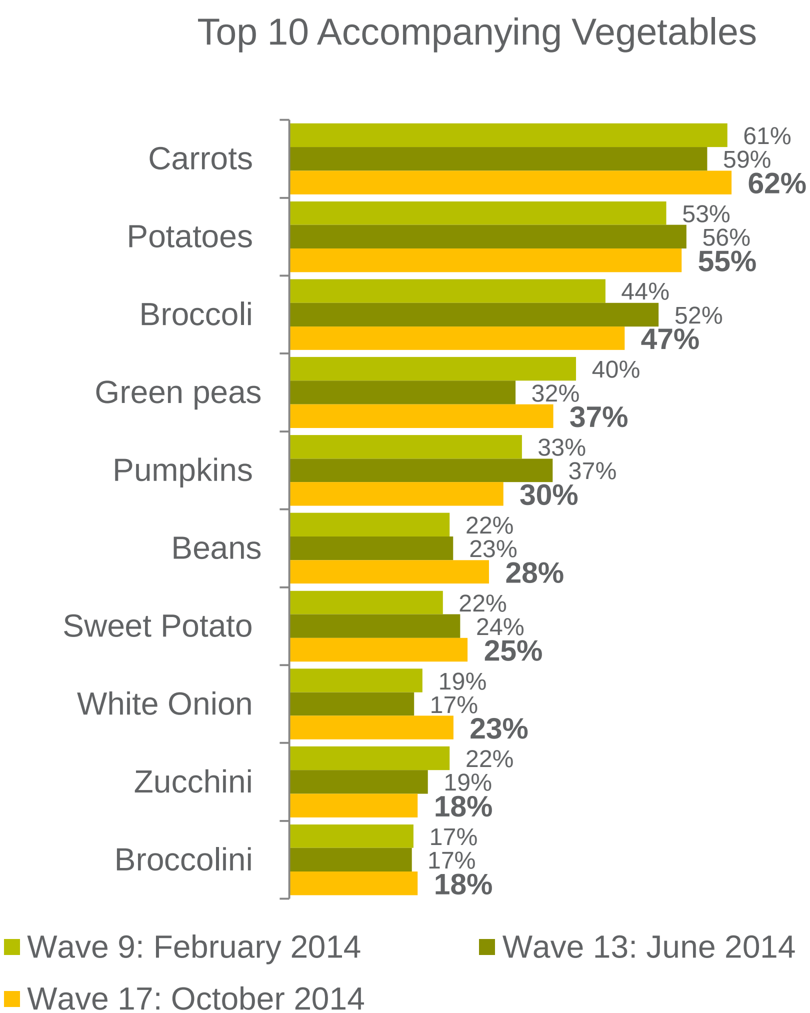
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Cooking Preference



- Cauliflower is consistently served with carrots and potatoes. This wave saw a greater accompaniment with beans and onion.
- Steaming and boiling are the most common cooking techniques. This wave consumers are less likely to boil and use cauliflower for soup, most like due to seasonal changes.

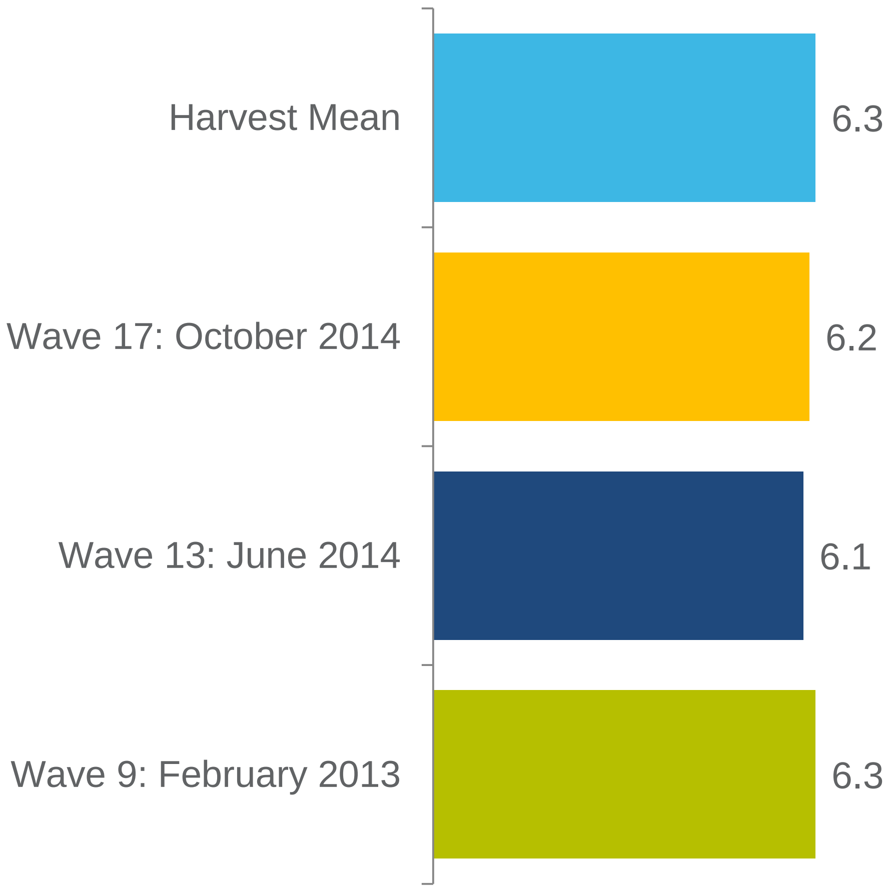
Top 10 Cooking Styles

	Wave 9	Wave 13	Wave 17
Steaming	**55%**	**53%**	**60%**
Stir frying	**42%**	**36%**	**36%**
Boiling	**40%**	**40%**	**36%**
Microwave	28%	20%	23%
Soup	21%	26%	19%
Baking	15%	12%	15%
Raw	11%	10%	11%
Roasting	9%	11%	11%
Stewing (slow cooking)	11%	10%	11%
Mashing	8%	5%	7%

Q9. How do you typically cook cauliflower?
Q10a. And when are you serving cauliflower which of the following do you also serve together with this?
Sample Wave 9 N=316, Wave 13 N=309, Wave 17 N=302

Importance of Provenance

- Provenance is slightly higher than the last wave, but still remain below the average for all commodities tracked thus far, the Harvest mean.



AUSTRALIAN MADE®

Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 9 N=316, Wave 13 N=309, Wave 17 N=302

Freshness and Longevity

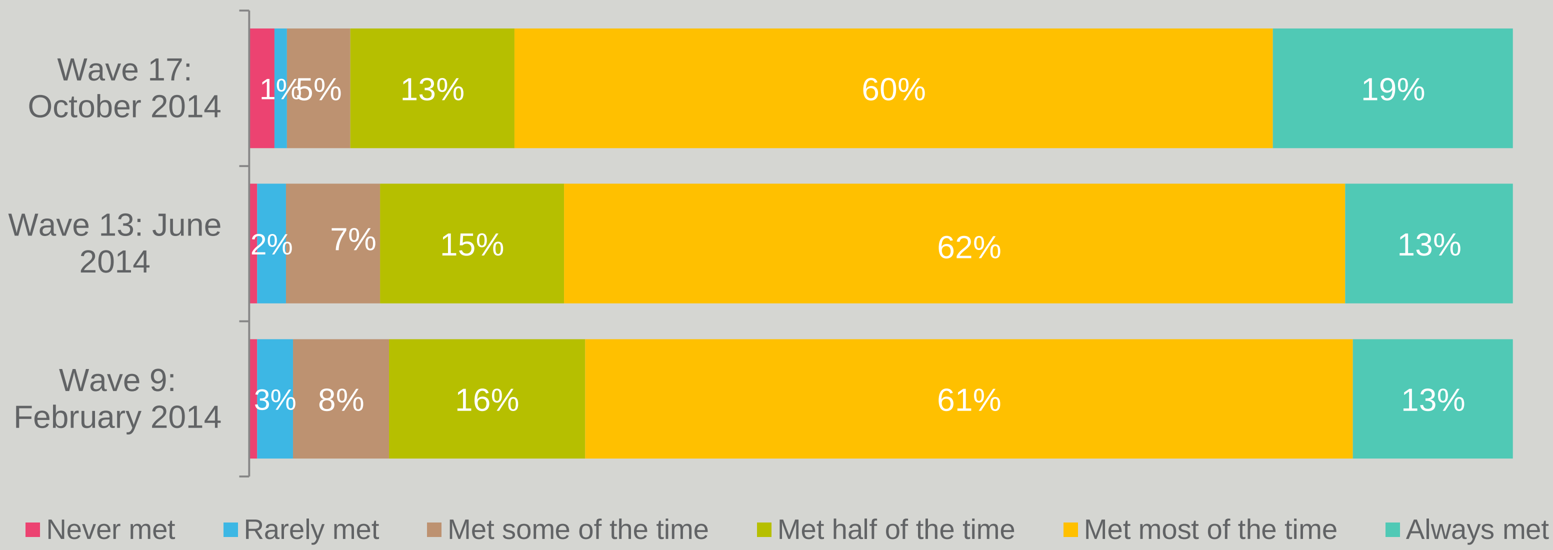
Expected to stay fresh for **8.8** days

▼ 8.5 days, Wave 9

▲ 8.9 days, Wave 13

- There is a small drop in longevity of freshness for October 2014 relative to the last wave (Wave 13), but freshness duration remained high compared to Wave 9.
- ‘Always’ meeting freshness expectations saw a substantial increase over the previous waves. Freshness was met for the majority of consumers most of the time.

Expectations Met



Q12. How long do you expect cauliflower to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy cauliflower?
Sample Wave 9 N=316, Wave 13 N=309, Wave 17 N=302

HAL Horticulture Australia · colmar brunton.

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

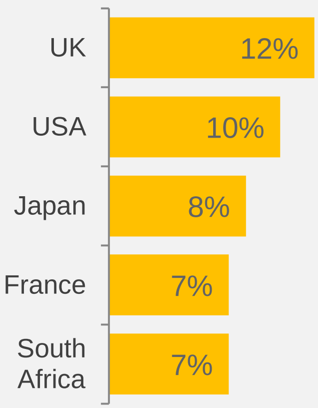
Cauliflower Product Launch Trends.

Cauliflower Global NPDs

August - October 2014

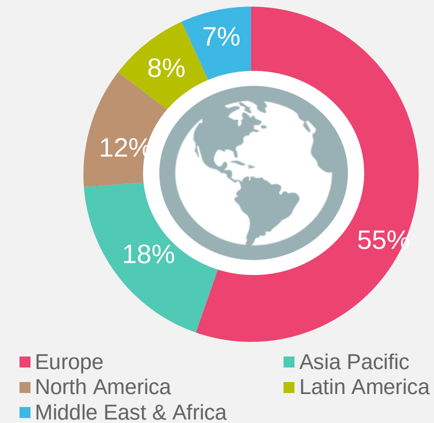
There were 103 products launched in the past three months that contained cauliflower. Europe and Asia Pacific were the main regions for launches, with UK and USA the key countries. Flexible packaging remained the most common format. Launches were predominately in fruit and vegetable, sauces and meals categories.

Country

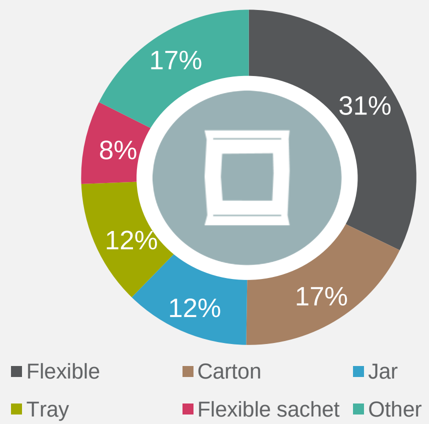


103 Global NPDs

Region



Top Pack Formats



Categories

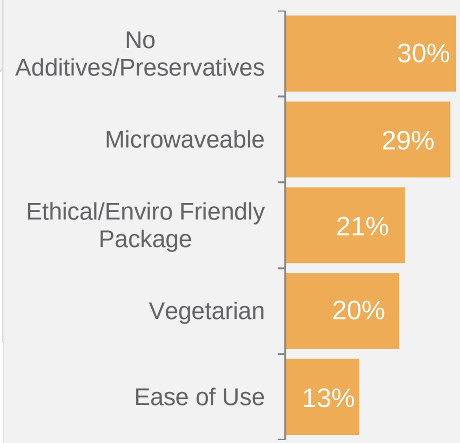
Fruit & Vegetables 31%

Sauces & Seasonings 22%

Meals & Meal Centres 15%

Soup 10%

Top Claims



Cauliflower Product Launches:
Last 3 Months (August – October 2014)
Summary

- There were 103 products launched over the past 3 months that contained cauliflower as an ingredient. This was a decrease from the previous wave (N=132)
- There were no cauliflower products launched in Australia in the past three months.
- More than half of the products were launched in Europe (55%), with UK, USA and Japan as key launch countries.
- Flexible (31%), carton (17%) and jar (12%) packaging were the top 3 pack formats.
- The top categories for launches were fruit and vegetables (31%), sauces and seasonings (22%) and meals and meal centres (15%).
- Convenience and health claims were typically used on products, including microwaveable (29%) and “no-added” (30%), environmentally friendly packaging (21%). These have been consistent with all previous waves tracked for cauliflower products.
- The most innovative product launched in the past three months was Tera's Healthy Blend Mediterranean Fruit & Vegetable Blend with Organic Protein; a powdered drink launched in USA (see following slides for examples of product launches).

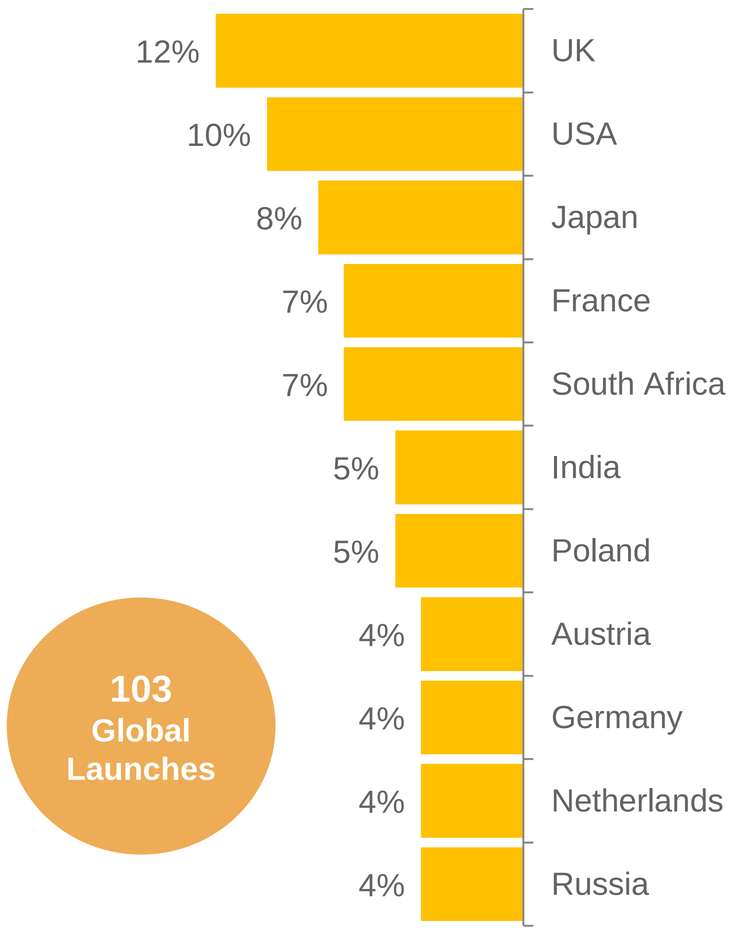
Source: Mintel (2014)

Cauliflower SKUs

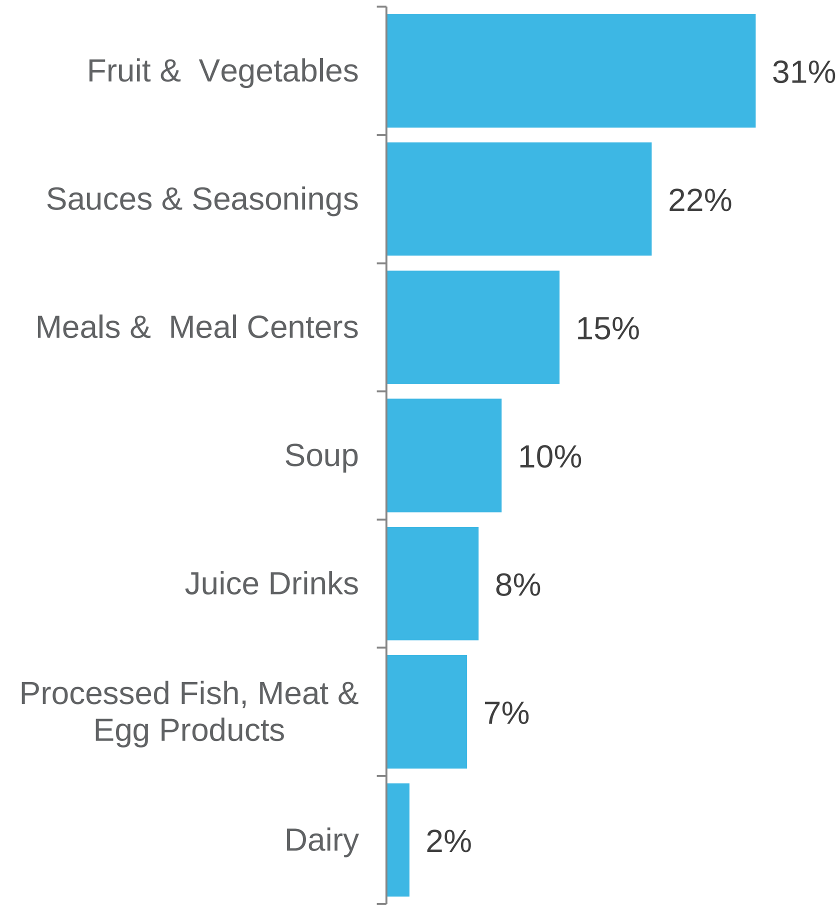
Country, Region & Categories

- The key three countries for cauliflower launches and innovation were[77] UK, USA and Japan.
- Products containing cauliflower were launched across multiple categories including fruit and vegetables, sauces and meals.

Top Launch Countries



Top Launch Categories

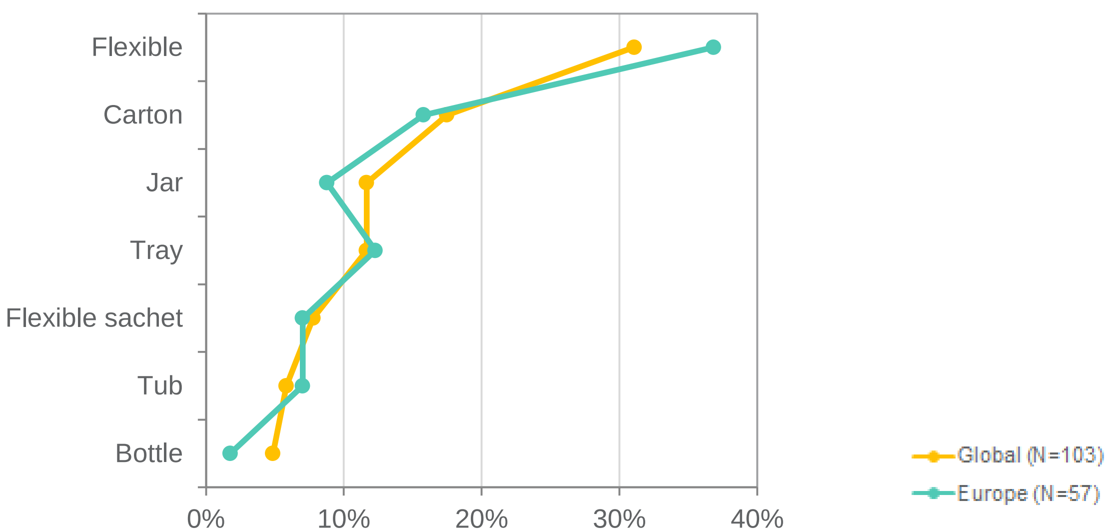


Number of Global Cauliflower NPDs for the L3M N=103

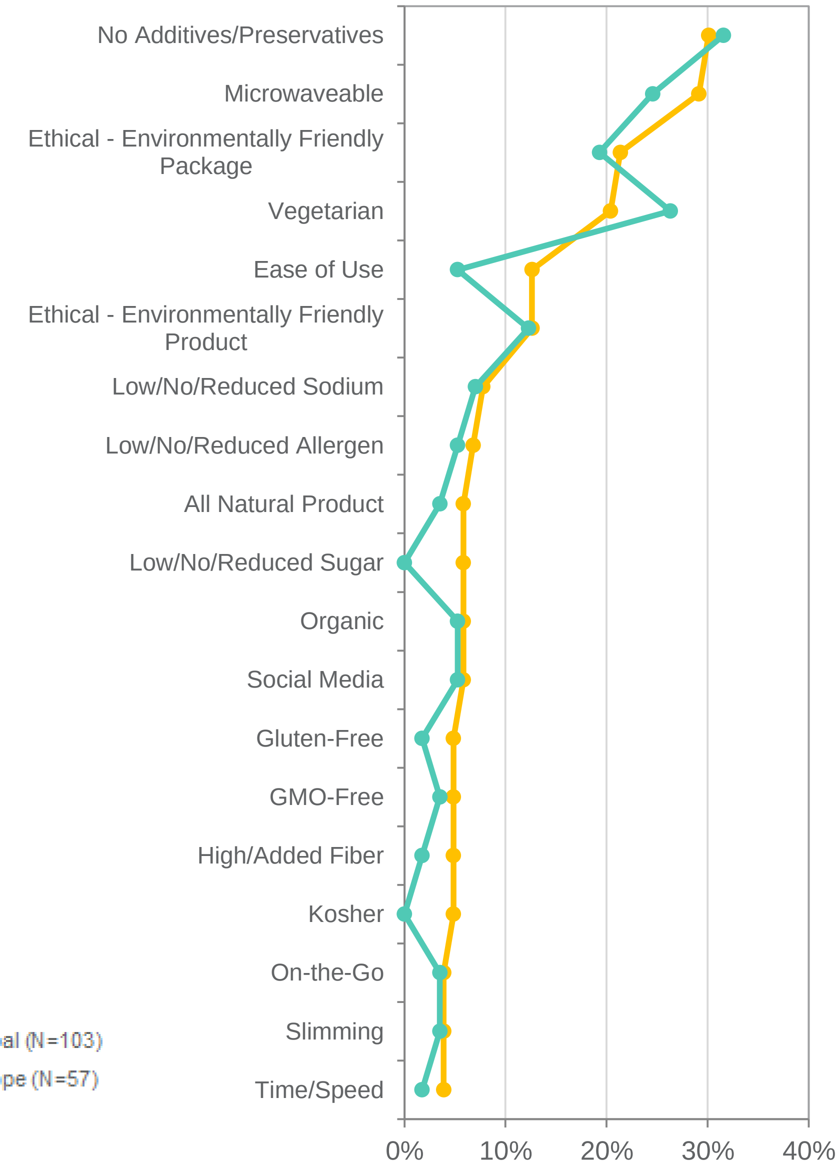
Cauliflower Launches
Top Claims & Pack Formats Used

- Flexible packaging was the predominant format type for products launched in the last three months. Cartons, jars and trays were also common formats.
- Convenience and health claims were most popular over the last three months. Vegetarian was a more popular claim in Europe.

Pack Formats Launched



Top Claims Used



Number of Global Cauliflower NPDs for the L3M N=103
Only shown for global and Europe as sample (other regions sample size for launches were N<30)

Innovative Cauliflower Launches:

L3M (August – October 2014)

Good Goût Cauliflower, Ham & Parmesan (France)

Contains 90% cauliflower, just the right amount of ham, a little parmesan and nothing else. The organic certified product is suitable for babies from 12 months of age and can be heated in a bain-marie or microwave. It retails in a 220g pack that can be carried anywhere without risk of breakage and contains no bisphenol A or phthalates.

Claims:
No Additives/Preservatives, Organic, On-the-Go, Babies & Toddlers (0-4), Microwaveable

Fresh Express Shredded Broccoli & Cauliflower Salad (USA)

Contains red butter, spinach, shredded broccoli and cauliflower, carrots, red cabbage and is said to be an excellent source of vitamin A and C and a good source of dietary fiber. This thoroughly washed and ready-to-eat product contains no preservatives and retails in a 5-oz. Keep-Crisp pack.

Claims:
No Additives/Preservatives, High/Added Fiber, Other (Functional), Ease of Use, Convenient Packaging, Bone Health

Marks & Spencer Spiced Roasted Squash and Cauliflower with a Keralan Coconut Curry Sauce (UK)

Features mild spiciness and can be prepared in the oven for 26 minutes. Each portion provides one out of five recommended portions of vegetables a day. The product is suitable for vegetarians and retails in a 415g partially recyclable pack, bearing the FSC and Eat Well logo.

Claims:
Vegetarian, Ethical - Environmentally Friendly Package

Albertson's Fresh-Made Grab N Go Vegetable Tray with Cauliflower (USA)

Albertson's Fresh-Made Grab N Go Vegetable Tray with Cauliflower features Marzetti light ranch salad dressing that has 40% fewer calories and 55% less fat than the regular ranch veggie dip. The product retails in an 8-oz. pack.

Claims:
Cobranded, Slimming, Low/No/Reduced Fat, Low/No/Reduced Calorie, On-the-Go

Source: Mintel (2014)

Innovative Cauliflower Launches:
L3M (August – October 2014)

New Covent Garden Soup Co. Taste of the World Indian Vegetable & Lentil Dahl Soup (UK)

Contains cauliflower, carrots and butternut squash mixed with the satisfying bites of yellow split peas, red split lentils and coconut. The vegetarian soup is made with seasonal, tasty ingredients, is packed full of flavours, and provides one and an half of the five fruit and vegetable recommended servings a day. It can be heated in the microwave, and retails in a 600g recyclable pack made from board from sustainable forests.

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

Les Crudettes La Ferme à Jules Summer Vegetables & Fresh Provence Herb Sauce (France)

Contains a selection of fresh baby carrots, radishes, cherry tomatoes and broccoli and cauliflower florets and two pots of fresh Provence herb sauce. This product retails in a 600g pack containing 520g vegetables and 80g sauce and providing four to five servings.

Claims:
NA

Tera's Healthy Blend Mediterranean Fruit & Vegetable Blend with Organic Protein (USA)

This USDA organic blend of antioxidant-rich fruits and vegetables is gluten-free and provides two full servings of fruits and vegetables and 10g protein per serving. Furthermore, this kosher certified blend can be added to 6-8-fl. oz. of juice, smoothies, or water to prepare, is rich in antioxidants vitamins A and C, and provides the right balance of fruits, vegetables, lean proteins, wholegrains, and healthy fats. This drink also contains added flax seeds, an organic superfood, with omega 3 fatty acids, is convenient, and has been made using ingredients that have been cultivated via sustainable practices.

Claims:
Low/No/Reduced Allergen, Gluten-Free, Kosher, Low/No/Reduced Fat, Ethical - Environmentally Friendly Product, Ease of Use, Organic, Antioxidant, Wholegrain

Manfood Achar Pickles (UK)

Manfood Achar Pickles are now available. The product is described as a sweet and sour Malaysian peanut and chilli vegetable pickle, ideal to be consumed with a curry. It retails in a 300g pack and was on display at the Speciality & Fine Food Fair 2014 in Olympia, London.

Claims:
NA

Source: Mintel (2014)

Innovative Cauliflower Launches:
L3M (August – October 2014)

ption: Waitrose Spiced Roasted Cauliflower & Lentil Salad (UK)

Waitrose Spiced Roasted Cauliflower & Lentil Salad consists of Dukkah spiced cauliflower and lentils in a cumin and pomegranate dressing. The product is suitable for vegetarians, retails in a 190g pack.

Claims:
Vegetarian

Kagome Light Drinkable Salad Juice (Japan)

Kagome Light Drinkable Salad Juice is repackaged. According to the manufacturer, one glass serving is equivalent to half of daily required vegetables, and it is recommended to be served with a meal. It is free from added sugar, salt and flavouring, and retails in a recyclable 1000ml carton. Launched on August 26, 2014.

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

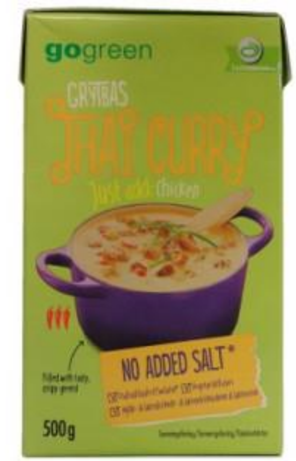
Stokes Sticky Pickle (UK)

Stokes Sticky Pickle is made with a unique blend of vegetables in a sweet and spicy sauce made with molasses and black treacle. It retails in a 430g pack. This product was on display at the Speciality & Fine Food Fair 2014 in Olympia, London.

Claims:
NA

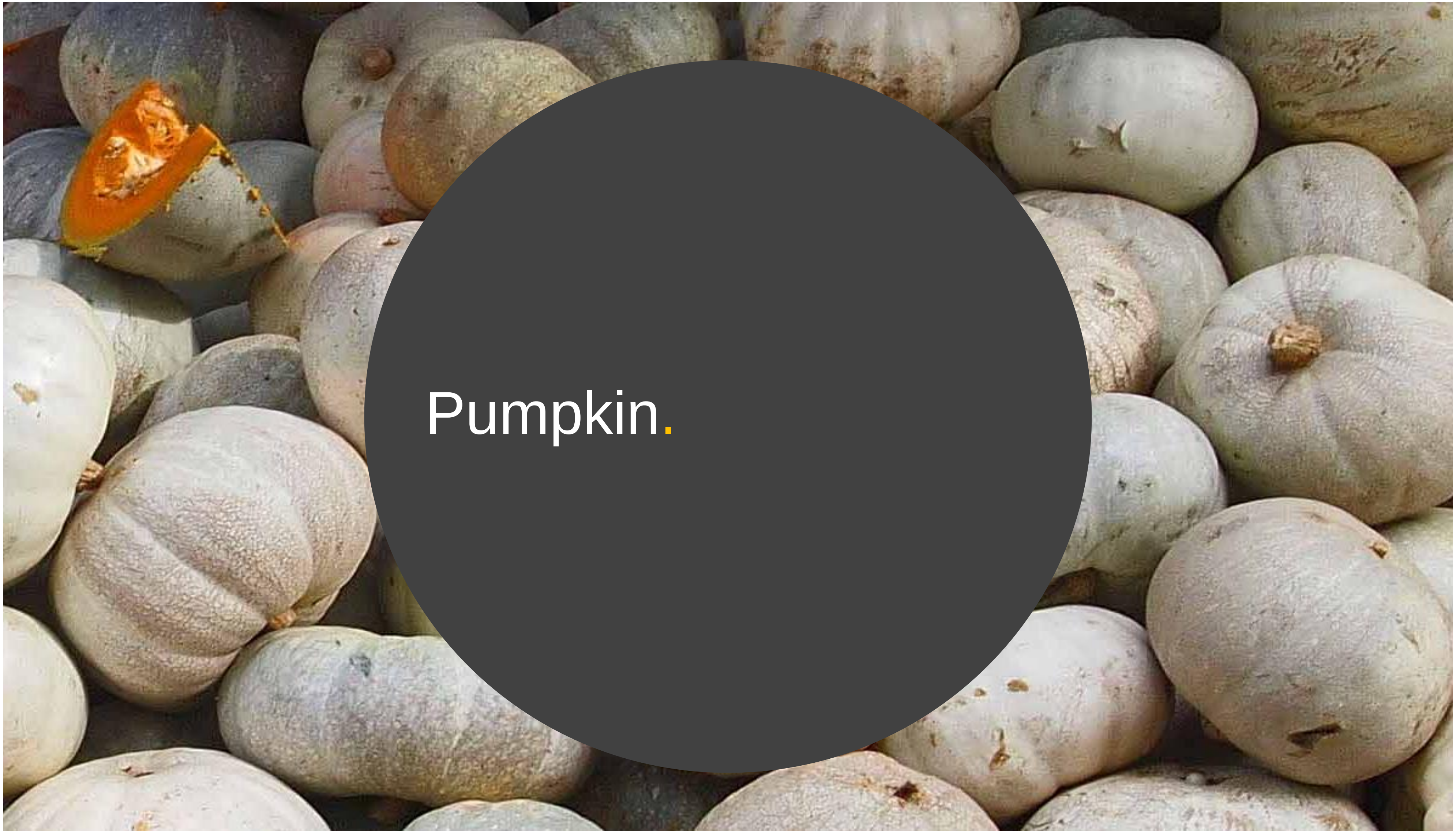
Lantmännen GoGreen Thai Curry Stew Base (Sweden)

Lantmännen GoGreen Grytbas Thai Curry (Thai Curry Stew Base) is said to be filled with tasty, crispy greens and just requires the addition of chicken. The cooking sauce contains no milk, lactose or added salt. The vegetarian product retails in a 500g pack featuring the FSC logo.



Claims:
Low/No/Reduced Lactose, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Ease of Use, Low/No/Reduced Sodium, Vegetarian

Source: Mintel (2014)



Pumpkin.

Purchase and Consumption Behaviour

Average Purchase **3.1** times per month

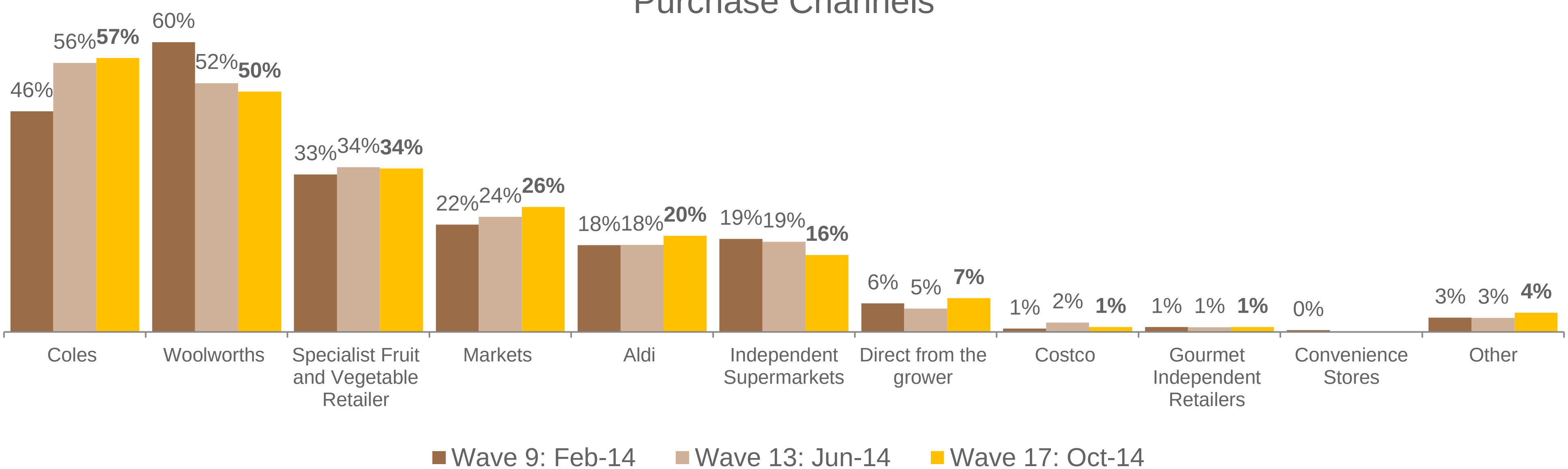
▲ 3.2 times, Wave 9
▼ 2.9 times, Wave 13

Average Consumption **9.1** times per month

▼ 8.5 times, Wave 9
▼ 8.4 times, Wave 13

- Average purchase and consumption frequency are up on the previous wave, with substantial gains seen for consumption frequency.
- Wave 17 saw Coles purchase frequency continue to increase while Woolworths continued on a downward trend. Markets also saw their upward trend continue.

Purchase Channels



Q1. On average, how often do you purchase pumpkin?
Q2. On average, how often do you consume pumpkin?
Q5. From which of the following channels do you typically purchase pumpkin?
Sample Wave 9 N=305 Wave 13 N=309 Wave 17 N=302

HAL Horticulture Australia

colmar brunton.

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

Average Spend & Price Sensitivity

Average weight of purchase

The average consumer typically purchased **1.4kg** of pumpkin, on trend with previous waves.

▲ 1.5kg, Wave 9

— 1.4kg, Wave 13

Recalled last spend

Recalled last spend on pumpkin was **$3.25**, slightly higher than the previous wave, but lower than Wave 9.

▲ $3.50, Wave 9

▼ $3.10, Wave 13

Value for money

Consumers' perceived value for money was relatively good **(6.8/10)**, which is substantially higher than the previous waves.

▼ 6.4/10, Wave 9

▼ 6.5/10, Wave 13

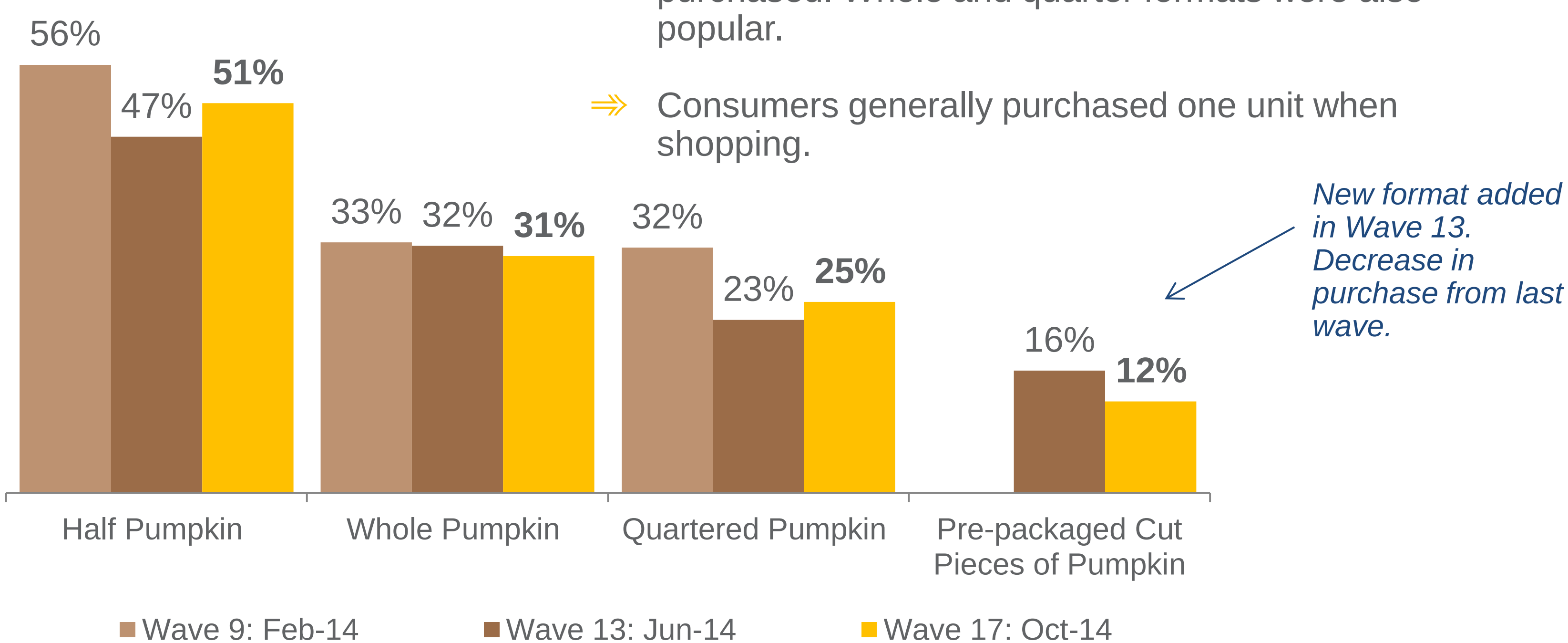
Q3. How much pumpkin do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 9 N=305 Wave 13 N=309 Wave 17 N=302

Horticulture Australia

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

Pack Formats Purchased

- Half pumpkin remained the most common format purchased. Whole and quarter formats were also popular.
- Consumers generally purchased one unit when shopping.

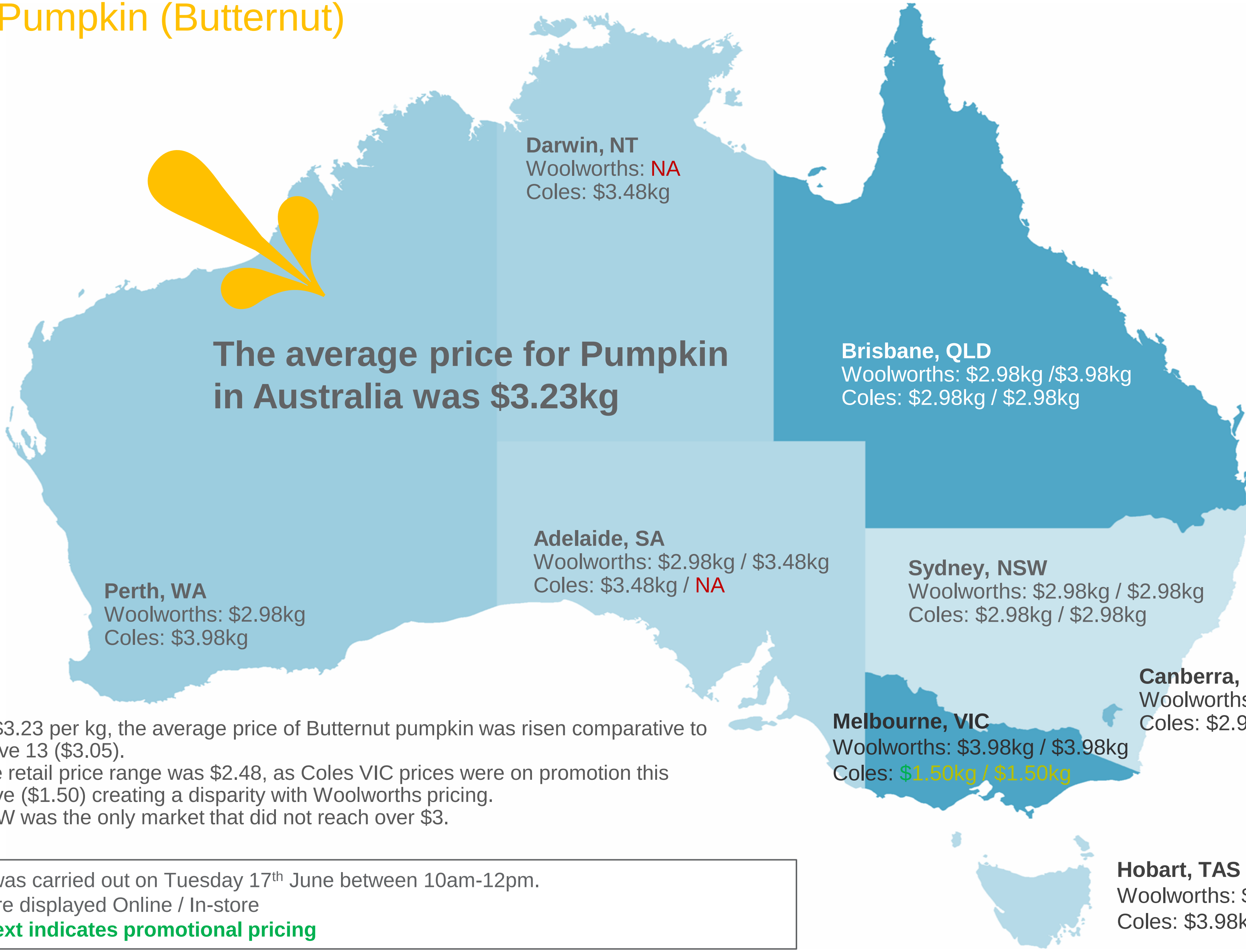


Average number purchased	Half Pumpkin	Whole Pumpkin	Quartered Pumpkin	Pre-packaged Cut Pieces
Wave 9: February 2014	1.2	1.2	1.2	-
Wave 13: June 2014	1.2	1.1	1.4	1.5
Wave 17: October 2014	1.2	1.1	1.4	1.4

Q3a. How much pumpkin does this typically equate to?
Sample Wave 9 N=305 Wave 13 N=309 Wave 17 N=302

Online and In-store Commodity Prices

Pumpkin (Butternut)

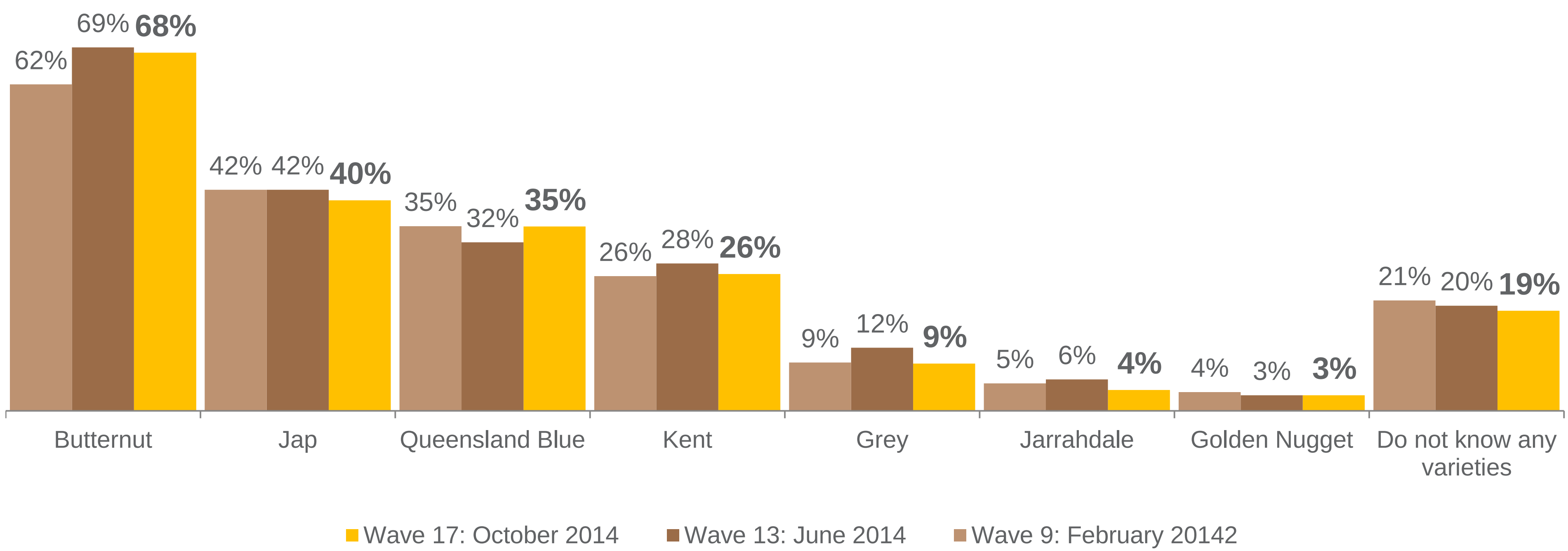


- At $3.23 per kg, the average price of Butternut pumpkin was risen comparative to Wave 13 ($3.05).
- The retail price range was $2.48, as Coles VIC prices were on promotion this wave ($1.50) creating a disparity with Woolworths pricing.
- NSW was the only market that did not reach over $3.

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

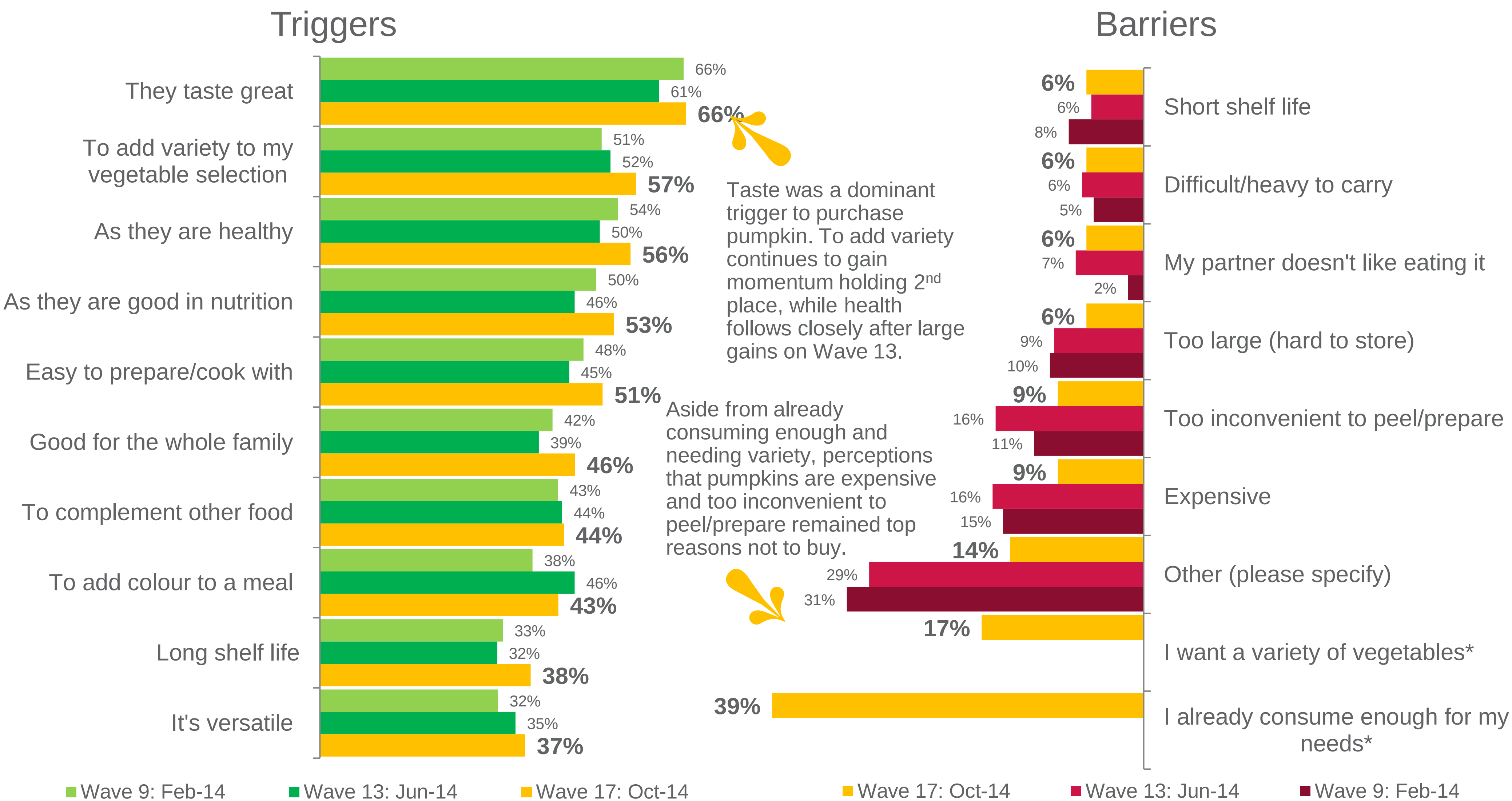
Spontaneous Varietal Awareness

- Recall of Pumpkin types is on trend with previous waves. Butternut and Jap varieties remained the most recalled types.
- Just under one fifth of respondents were unable to recall a type of pumpkin.



Q6a. What varieties of pumpkin are you aware of? (unprompted)
Sample Wave 9 N=305 Wave 13 N=309 Wave 17 N=302

Triggers & Barriers to Purchase



Taste was a dominant trigger to purchase pumpkin. To add variety continues to gain momentum holding 2nd place, while health follows closely after large gains on Wave 13.

Aside from already consuming enough and needing variety, perceptions that pumpkins are expensive and too inconvenient to peel/prepare remained top reasons not to buy.

Q7. Which of the following reasons best describes why you purchase pumpkin?
Q8. Which reason best describes why you don't buy pumpkin more often?
Sample Wave 9 N=305 Wave 13 N=309 Wave 17 N=302
*New codes added at Wave 17

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colmar brunton.

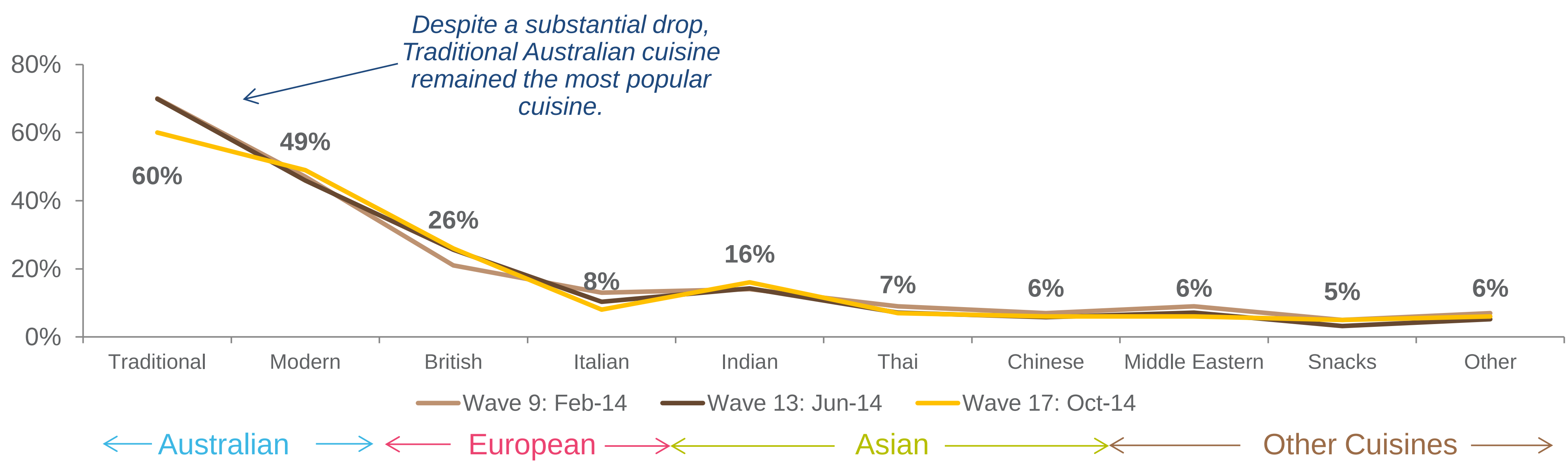
Cooking Preferences & Occasions

- Australian cuisine, both traditional and modern are typically cooked using pumpkin. Traditional Australian remains the most popular cuisine despite a drop this wave.
- Weekday dinners, weekend dinners and family meals are the main consumption occasions.

Wave 17 Top 5 Consumption Occasions

Weekday Dinner	64%	— 64% Wave 13	— 64% Wave 9
Weekend Dinner	51%	▼ 50% Wave 13	▲ 52% Wave 9
Family meals	44%	▲ 45% Wave 13	▲ 46% Wave 9
Every-day meals	33%	▼ 30% Wave 13	▼ 25% Wave 9
Quick Meals	19%	▼ 16% Wave 13	▼ 18% Wave 9

Typical Cuisine Cooked



Q10. What cuisines do you cook/consume that use pumpkin?
Q11. Which of the following occasions do you typically consume/use pumpkin?
* Indicates significant difference between waves.
Sample Wave 9 N=305 Wave 13 N=309 Wave 17 N=302

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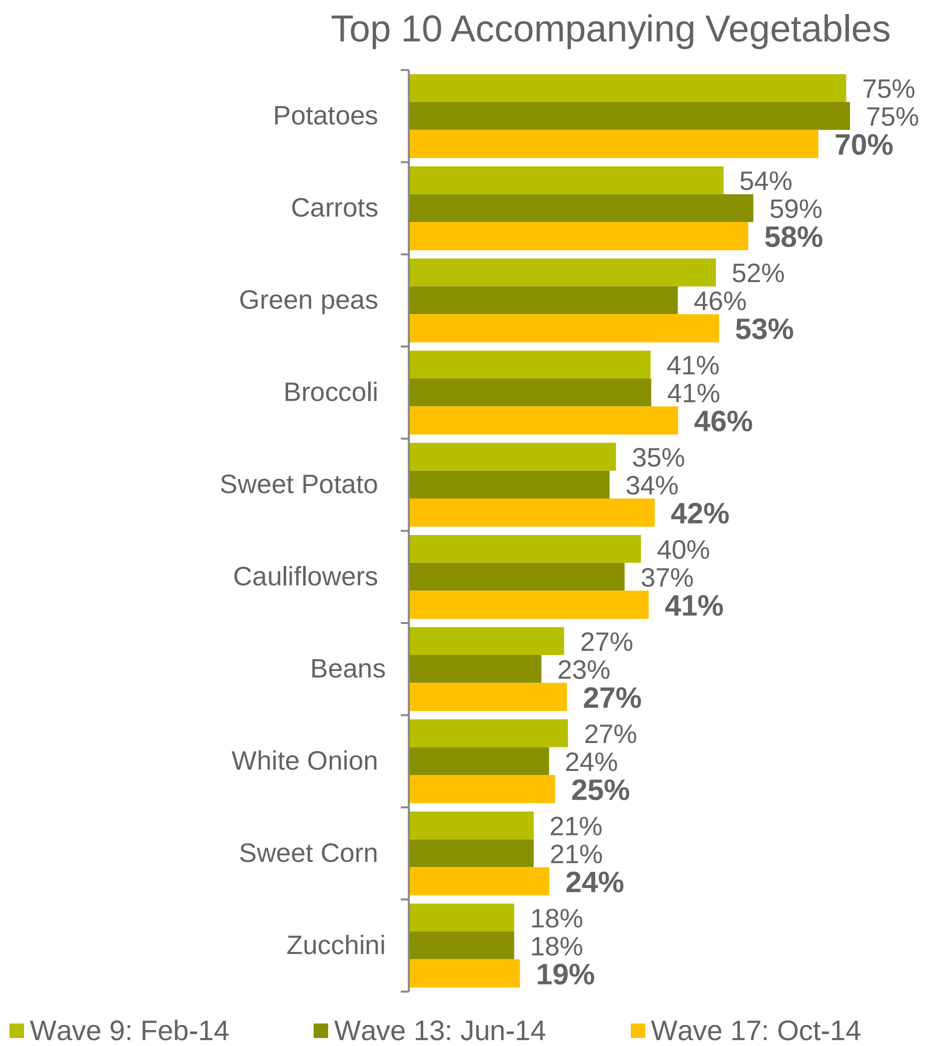
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Cooking Preferences & Occasions:



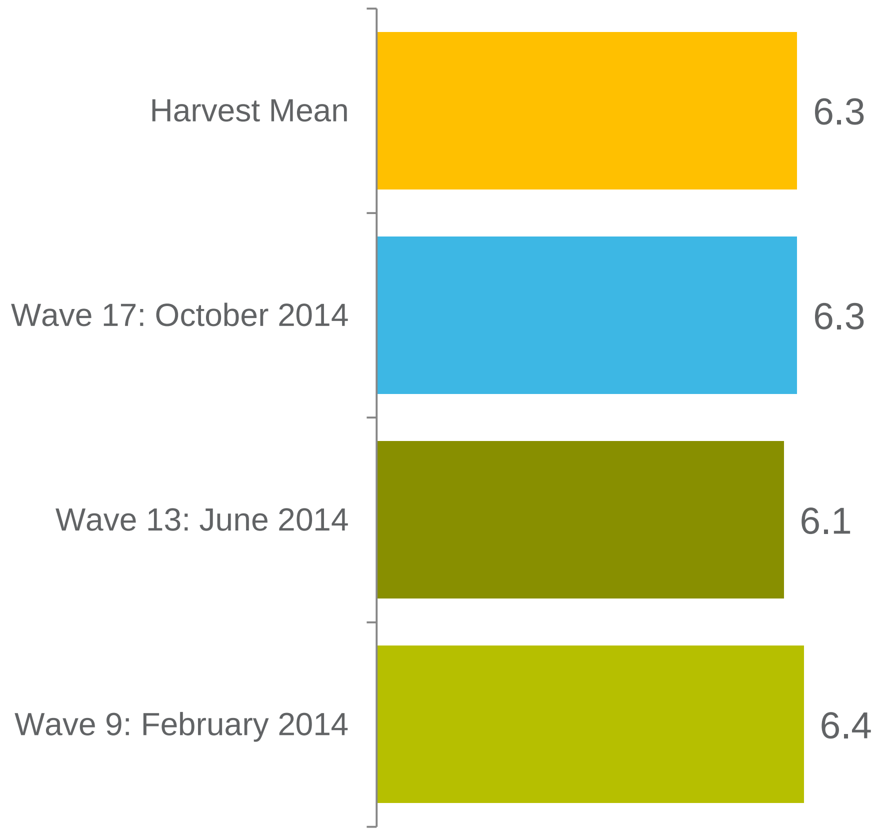
- Consumption with potatoes saw a drop in Wave 17, but remained the most common accompanying vegetable.
- Despite a drop, roasting remained the top cooking style, while baking saw a notable increase to become the second most preferred cooking style, followed closely by soup and mashing.

Top 10 Cooking Styles			
	Wave 9	Wave 13	Wave 17
Roasting	**69%**	**72%**	**68%**
Baking	**44%**	**40%**	**47%**
Soup	**47%**	**55%**	**46%**
Mashing	45%	44%	44%
Steaming	40%	33%	37%
Boiling	39%	35%	34%
Stewing	19%	20%	15%
Microwave	20%	20%	15%
Puree	12%	14%	12%
Stir frying	10%	7%	12%

Q9. How do you typically cook pumpkin?
Q10a. And when are you serving pumpkin which of the following do you also serve together with this?
* Indicates significant difference between waves.
Sample Wave 9 N=305 Wave 13 N=309 Wave 17 N=302

Importance of Provenance

- Current importance of provenance increased since Wave 13 to 6.3/10, and now sits in line with the Harvest mean.



AUSTRALIAN MADE

Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 9 N=305 Wave 13 N=309 Wave 17 N=302

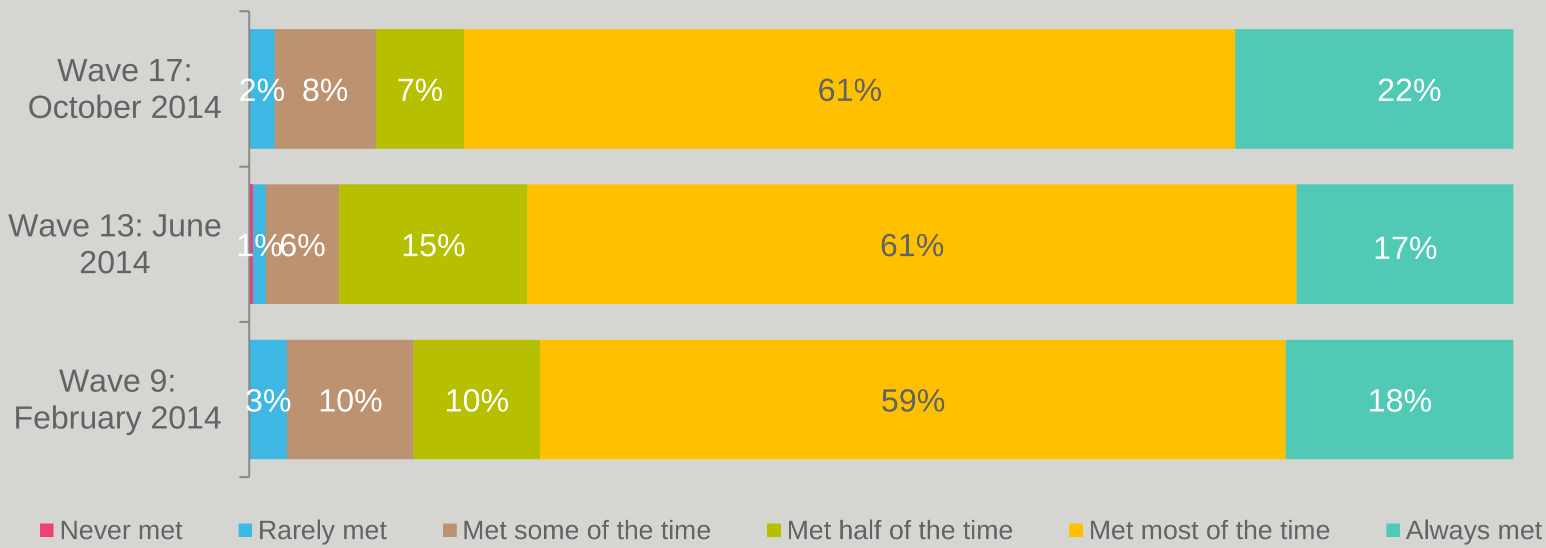
Freshness and Longevity

Expected to stay fresh for **12.0** days

▲ 12.2 days, Wave 9
▲ 12.5 days, Wave 13

- Pumpkin was expected to stay fresh for 12.0 days, which was notably lower then previous waves.
- Consumer expectations of pumpkin freshness were generally met, with expectations always being met increasing over the previous waves, while expectations that are only met half of the time or less declined.

Expectations Met



Q12. How long do you expect pumpkin to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy pumpkin?
Sample Wave 9 N=305 Wave 13 N=309 Wave 17 N=302

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

Pumpkin Product Launch Trends.

Pumpkin Global NPDs

August – October 2014

There were 608 products launched in the past three months that contained pumpkin. Europe and Asia Pacific were the main regions for launches, with USA and UK the key countries. Flexible packaging remained the most common format. Launches were predominately in snack and bakery categories.

Pumpkin Product Launches:
Last 3 Months (August – October 2014)
Summary

- A total of 608 products containing pumpkin as an ingredient were launched globally in the last 3 months, an increase on the previous quarter – attributed to occurrence of autumn and Halloween in the most popular launch country, USA.
- There were 21 pumpkin launches in Australia this quarter.
- Europe (39%) and Asia Pacific (31%) were the top regions for launches. This is consistent with previous trends. Key countries for innovation were USA (13%) and UK (7%).
- Flexible packaging (incl. standing flexible) was the dominant pack format used for launches (43%).
- Top categories for product launches were snacks (20%), bakery goods (19%) and breakfast cereals (8%).
- Core claims for product launches globally were consistently based around health (e.g. no additives/preservatives 24%, low allergen 21% and gluten-free 19%), all on trend with previous waves.
- The most innovative launch found was the Canadian Pumpkin Patch Pals Pie Baking Kit consisting of 2 small pumpkins and a spice mix to create a singular pie (examples of products can be found at the end of the pumpkin trend report).

Source: Mintel (2014)

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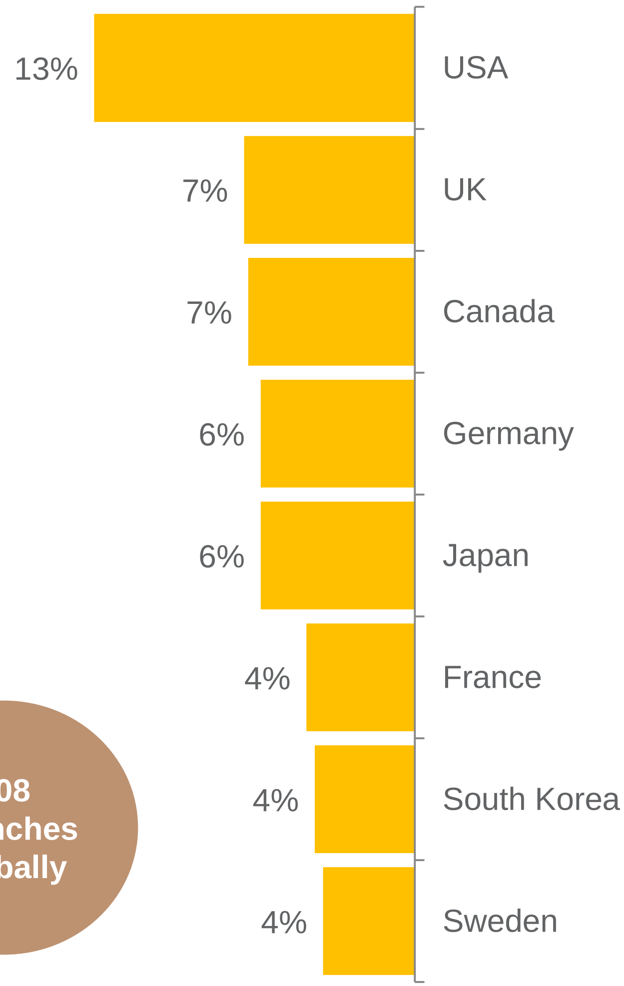
Pumpkin Launches
Country & Categories

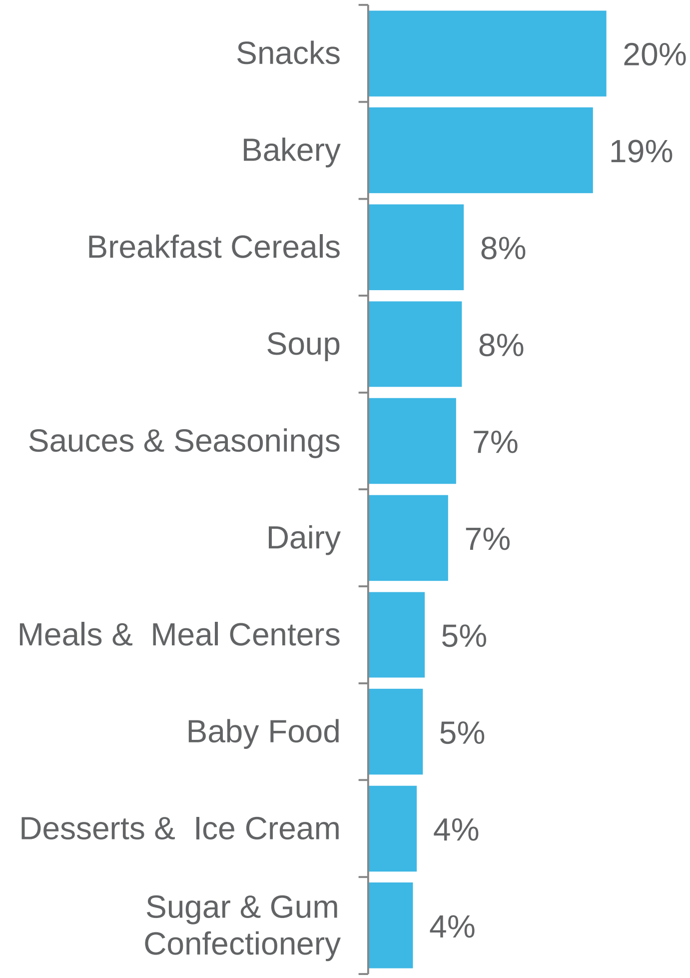
- The most active country for launches in the last 3 months was the USA, coinciding with Halloween and the beginning of autumn.
- Snacks remained the key category for launches, with bakery and breakfast cereals also common launches.

Top Launch Countries



608 Launches Globally

Top Launch Categories



Number of Global Pumpkin NPD for the L3M N=608

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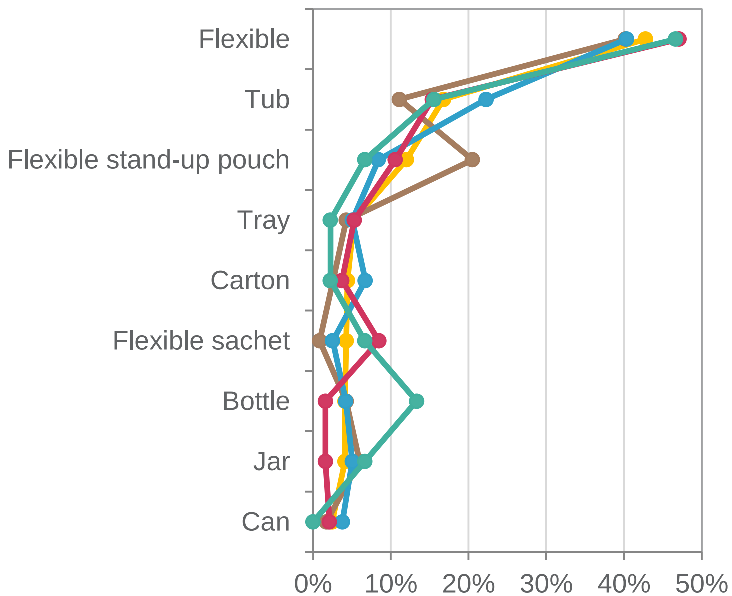
Pumpkin Launches

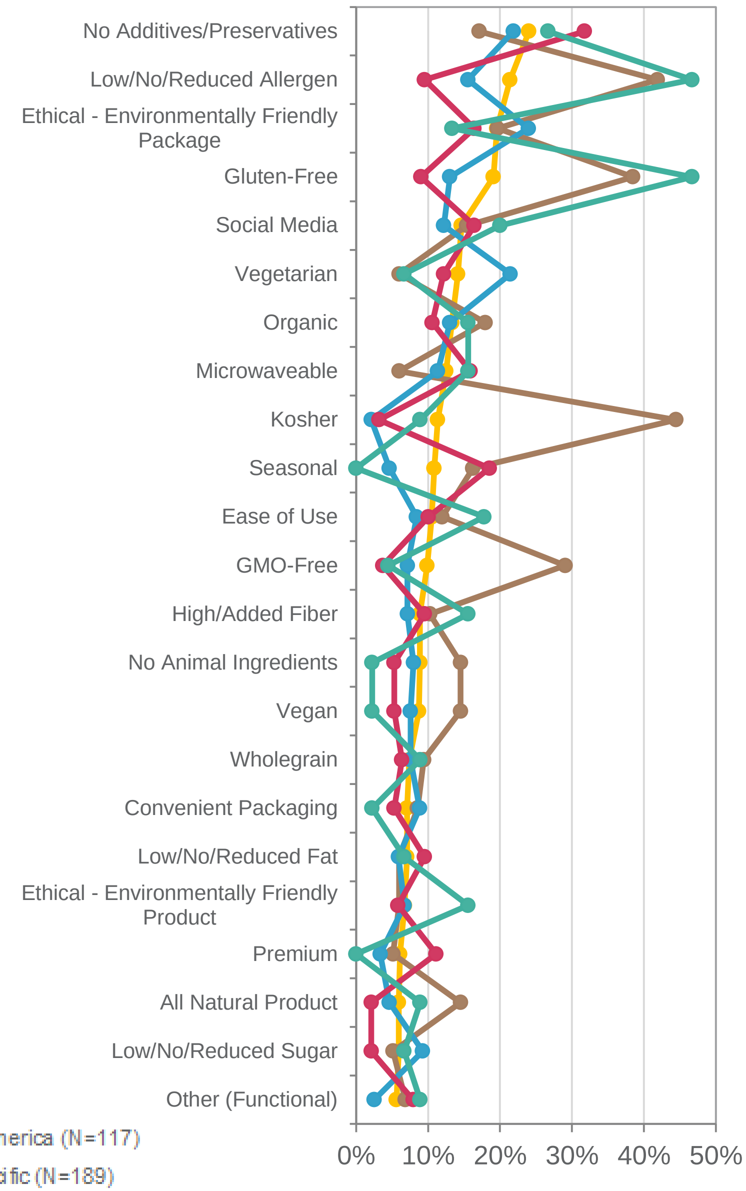
Top Claims & Pack Formats Used

- Pack formats were consistent across regions, with the primary format of choice being flexible packaging.
- Health were the key claims used globally, with allergen free and gluten free more predominant in North & Latin America compared with other regions.

Pack Formats Launched



Top Claims Used



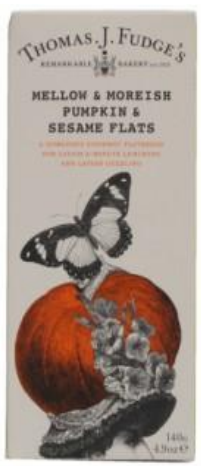
Global (N=608)
North America (N=117)
Europe (N=238)
Asia Pacific (N=189)
Latin America (N=45)

Number of Global Pumpkin NPD for the L3M N=608
Only regions with n >30 are displayed

Innovative Pumpkin Launches:
L3M (August – October 2014)

Thomas .J. Fudge's Mellow & Moreish Pumpkin & Sesame Flats (UK)

Thomas .J. Fudge's Mellow & Moreish Pumpkin & Sesame Flats are described as gorgeous gourmet, crisp and seeded flatbreads. The product is suitable for vegetarians and retails in a 140g pack featuring Facebook and Twitter links.



Claims:
Social Media, Vegetarian

Rickland Orchards Purely Simple Salad Topper (USA)

This perfect blend of fruits, nuts, and seeds comprises a blend of cranberries, sunflower seeds, pumpkins seeds, edamame, apples, walnuts, flax seeds, and chia seeds. This non-GMO salad topper is claimed to be a good source of fiber and low in saturated fat. This kosher certified product represents an easy way to add flavor to greens, can also be enjoyed on its own, as a snack, and retails in a 1-lb. pack featuring both the Facebook and Twitter logos.

Claims:
Low/No/Reduced Saturated Fat, GMO-Free, No Additives/Preservatives, High/Added Fiber, Kosher, Ease of Use, Organic, Social Media

Seed and Bean Pumpkin Seeds and Hemp Oil Organic Extra Dark Chocolate (Norway)

Seed and Bean Pumpkins Seeds and Hemp Oil Organic Extra Dark Chocolate is now available. This product is handmade in England, contains 72% of cocoa, is suitable for vegans and vegetarians, is free from soya, and retails in an 85g compostable pack bearing the Ethical Award and Fairtrade logo for a sustainable future.

Claims:
Low/No/Reduced Allergen, Vegan, Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Ethical - Human, Organic, No Animal Ingredients, Vegetarian

Pumpkin Patch Pals Pie Baking Kit (Canada)

Pumpkin Patch Pals Pie Baking Kit is now available. The product retails in a pack with two fresh pumpkins and one spice packet, featuring recipe suggestions.

Claims:
NA

Source: Mintel (2014)

Innovative Pumpkin Launches:
L3M (August – October 2014)

Almond Dream Pumpkin Spice with Cinnamon Almond Drink (USA)

Made with pumpkin, real almonds and cinnamon spice. It is free from preservatives, soy, gluten, cholesterol, lactose and dairy. The drink is low in fat and contains 40% less sugar than the leading brand. It is a good source of calcium and vitamin A, and an excellent source of vitamins D, B12, and E. The limited edition and seasonal product is kosher certified, suitable for vegans and retails in a 32-fl. oz. recyclable pack featuring the Facebook link.

Claims:
Low/No/Reduced Lactose, No Additives/Preservatives, Low/No/Reduced Allergen, Low/No/Reduced Cholesterol, Social Media, Seasonal, Ethical - Environmentally Friendly Package, Vegan, Kosher, Low/No/Reduced Fat, Low/No/Reduced Sugar, Gluten-Free, No Animal Ingredients, Limited Edition

Penny to Go Apricot-Pumpkin Juice (Austria)

Penny to Go Saft Aprikose-Kürbis (Apricot-Pumpkin Juice) is 100% directly pressed, and is free from added flavourings and concentrates. This fresh multifruit juice and vegetable mix has been gently pasteurised, and retails in a 250ml bottle.

Claims:
No Additives/Preservatives, Low/No/Reduced Allergen, On-the-Go

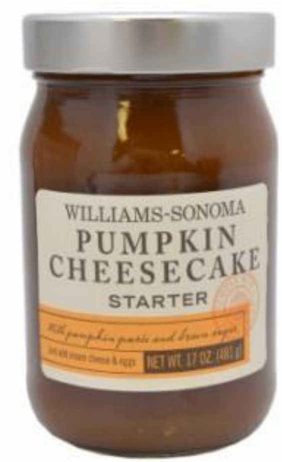
Plum Organics Hello Dinner Pumpkin, Spinach, Quinoa & Baby Grains (USA)

This organic wholegrain and veggie medley product just needs the addition of boiling water, is kosher and USDA organic certified, contains 2g of fiber and protein, and contains spinach, which is a source of iron, folate, and vitamin K, quinoa, which is a good source of protein, sage, and carrot, which is high in vitamin A. This microwaveable product contains no GMO's, is easy to prepare, and retails in a recyclable and BPA-free pack containing 5 x 0.6-z. packets. The manufacturer supports the Full Effect program which nourishes little ones in need across America.

Claims:
Ethical - Charity, GMO-Free, High/Added Fiber, Kosher, Ease of Use, Microwaveable, Ethical - Environmentally Friendly Package, Organic, Antioxidant, Wholegrain, Babies & Toddlers (0-4)

Williams-Sonoma Pumpkin Cheesecake Starter (USA)

Williams-Sonoma Pumpkin Cheesecake Starter is a puree of pumpkin mixed with brown sugar. The starter is easy to prepare, requiring the addition of cream cheese and eggs. This product retails in a 17-oz. pack.



Claims:
Low/No/Reduced Allergen, On-the-Go, Time/Speed, Ease of Use, Gluten-Free, Antioxidant, Wholegrain

Source: Mintel (2014)

Innovative Pumpkin Launches:
L3M (August – October 2014)

Williams-Sonoma Anette's Chocolates Spiced Pumpkin Seed Brittle Bite (USA)

Williams-Sonoma Anette's Chocolates Spiced Pumpkin Seed Brittle Bite has been relaunched under a new brand name. It is described as a crunchy candy brittle that derives its unique character from toasted pumpkin seeds and microbrewed California pale ale, enriched with traditional pumpkin pie spices and Indonesian vanilla. This product retails in a 1.2-oz pack.

Claims:
NA

Rose Biomanufaktur Pumpkin & Curry Soup (Germany)

Rose Pumpkin & Curry Soup is Demeter bio-dynamic certified and suitable for vegetarians and vegans. The soup combines the creamy nutty flavour of pumpkin with exotic curry. It is free from preservatives, gluten and lactose, and can be prepared both on a stove and in a microwave. This product retails in a 400ml pack featuring the ClimatePartner logo for climate neutrality.

Claims:
Low/No/Reduced Lactose, No Additives/Preservatives, Low/No/Reduced Allergen, Gluten-Free, Vegan, Ethical - Environmentally Friendly Product, Microwaveable, Organic, No Animal Ingredients, Vegetarian, Carbon Neutral

Kathie's Kitchen Super Seedz Sea Salt Gourmet Pumpkin Seeds (USA)

The all natural no shell pumpkin seeds are said to have savory blend of aged cayenne pepper, garlic, sea salt and just enough spice to satisfy without the inconvenience of a runny nose. They are dry roasted and contains the following: 8g protein per ounce to manage weight and build healthy body composition; 15% RDI iron to facilitate the growth of healthy cells that keep oxygen flowing and the body energized; 15% RDI zinc to strengthen the immune system; and magnesium and potassium that are essential for heart-healthy electrolytes. This product is suitable for vegans and free from gluten, peanut, tree nut, egg, dairy, fish, shellfish, MSG, soybean, cholesterol, GMO and trans fat.

Claims:
No Additives/Preservatives, All Natural Product, Low/No/Reduced Allergen, Low/No/Reduced Cholesterol, No Animal Ingredients, Social Media, Other (Functional), Immune System (Functional), Weight & Muscle Gain, Gluten-Free, Low/No/Reduced Transfat, Vegetarian, Vegan, Cardiovascular (Functional), GMO-Free

H-E-B Carrot, Pumpkin & Orange Soup (Mexico)

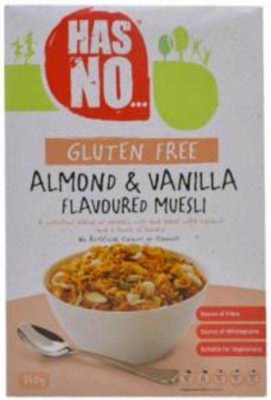
H-E-B Sopa Preparada Zanahoria, Calabaza y Naranja (Carrot, Pumpkin & Orange Soup) is a gluten free, microwaveable product that can be enjoyed as an appetizer or as a on-the-go smoothie. It contains no artificial colors or flavors, and retails in a 454g pack.

Claims:
No Additives/Preservatives, Low/No/Reduced Allergen, On-the-Go, Gluten-Free, Microwaveable

Source: Mintel (2014)

Top Australian Pumpkin Launches:
L3M (August – October 2014)

Has No... Gluten Free Almond & Vanilla Flavoured Muesli



Woolworths Select Low Fat Sweet Potato & Pumpkin Soup

Fine Fettle Flats Carrot & Pepita Snacks

Sue Shepherd Roasted Pumpkin Soup

SPC with Sneaky Veg Spaga-a-Stralia Aussie Pasta Shapes with Tomato & Cheese

Heinz Condensed Soup & More Homestyle Vegetable Soup

Woolworths Select Ready To... Roast Spiced Pumpkin & Sweet Potato with Maple Butter

Hillcrest Secret Harvest Fruit Free Muesli Bars

Source: Mintel (2014)

In the Media.

General Vegetable News
(August – October 2014)

- A study conducted by the University of Queensland has found that eating large amount of fruit and vegetables can make you happier. Eight or more portions of fruit and vegetables per day can help improve mental wellbeing and physical health.

- A recent inquiry into country of origin labelling has recommended that labelling should include the level of imported ingredients on products. However, this recommendation is thought to add further confusion to consumers.

www.abc.net.au

Commodity News
(August – October 2014)

➢ Cauliflower and Brussels sprouts have been tipped as 2015's 'superfoods', with expected shortages of kale and quinoa.

www.heraldsun.com.au

➢ Sales of carving pumpkins for Halloween have continued to rise in Australia over the last few years.

www.abc.net.au

➢ Carrot growers in Victoria have opened a new plant that is used to turn seconds carrots into concentrate. The carrot concentrate is exported to Japan and used in vending machines.

www.abc.net.au

➢ Bean growers in Tasmania have been facing increased product costs and are meeting with Simplot to discuss ongoing prices for the coming year.

www.abc.net.au

Thanks.

Horticulture Australia