Monthly Tracker Report, Wave 18. Commodities: Broccoli, Chillies, Lettuce & Sweet Corn

Prepared by: Jenny Witham, Phillip Sargeant & Fiona McKernan

Contents

Background & Methodology

Background & Setting the Scene.

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

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

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

This wave's report (Wave 18, November 2014) focuses on:

- Broccoli
- Chillies
- Lettuce
- Sweet Corn

This is the fifth wave of tracking for these specific commodities. This current report will highlight any changes observed over the past twelve months.

Online Methodology.

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

Sample.

In total, 734 respondents completed the questionnaire. Respondents represented most States and Territories, as well as both metro and rural areas.

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

To qualify for the questionnaire, respondents...

⇛Were aged 18 years and over

⇛Purchased fresh vegetables at least once a fortnight

⇛Purchased at least one of the monthly commodities (Broccoli, Chillies, Lettuce and Sweet Corn) within the last month

⇛Were the main or joint grocery buyer.

	Total N=734	Broccoli n=399	Chillies n=215	Lettuce n=399	Sweet Corn n=398
Gender					
Male	36%	34%	40%	36%	35%
Female	64%	66%	60%	64%	65%
Age					
18-24 y.o	7%	5%	10%	8%	7%
25-34 y.o	19%	17%	23%	18%	21%
35-44 y.o	17%	19%	23%	14%	17%
45-54 y.o	20%	18%	20%	22%	19%
55-64 y.o	21%	24%	15%	20%	21%
65+ y.o	16%	18%	9%	18%	15%
Household					
Single Income no kids	16%	16%	17%	14%	15%
Double Income no kids	19%	17%	22%	19%	18%
Young Families	19%	17%	21%	18%	22%
Established Families	25%	24%	25%	26%	25%
Empty Nesters	22%	26%	15%	24%	20%
Location					
New South Wales	25%	23%	32%	22%	25%
Victoria	24%	22%	28%	22%	24%
South Australia	11%	11%	8%	13%	12%
Queensland	20%	21%	14%	19%	25%
Western Australia	12%	14%	11%	14%	11%
Tasmania	5%	6%	3%	7%	2%
Australian Capital Territory	3%	3%	4%	3%	2%
Northern Territory	0%	1%	0%	1%	0%

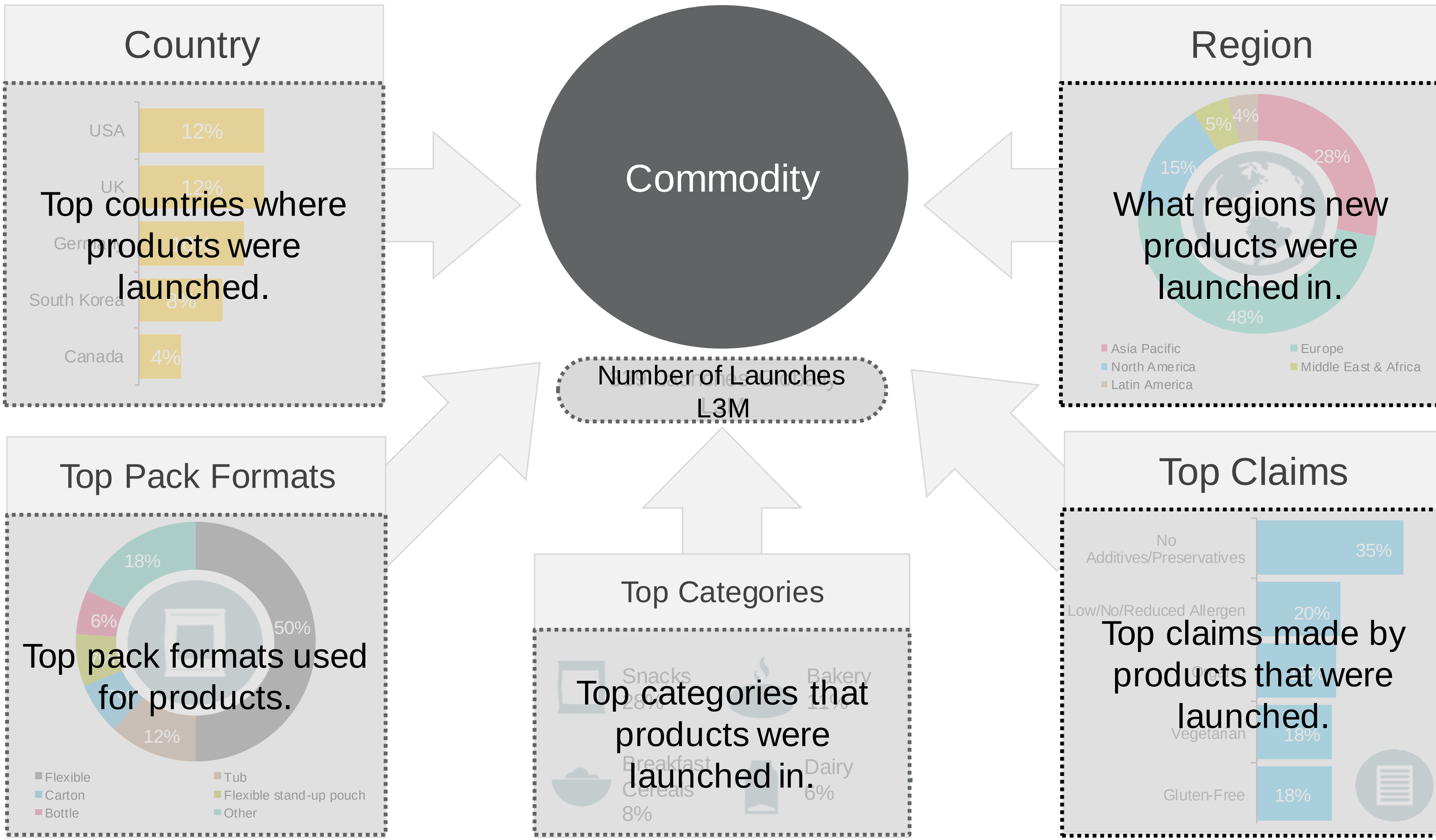
**Please note the lower number of chilli consumers is due to low incidence of purchase in the last month*

Trends Research: Our Approach

- Colmar Brunton has used a combination of both desk research and in the field market research to explore the trends for each vegetable commodity being tracked this month.
- Our main source of secondary data for this report was collected from Mintel Global New Products Database (GNPD).
- This data source is used to analyse products launched around the globe in the last three months (L3M) that contained each vegetable being tracked as a core ingredient.
- Trends are determined at a global and regional level.
- Claims and pack types used for the launched products are explored and the relevant product categories are determined. Specific examples of products being launched around the globe that are particularly innovative are displayed for reference.
- Trend reports are provided monthly and will reflect the 4 commodities tracked in the preceding period.

Product Launches Last 3 Months (L3M)
How to Read Summaries

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



Wave 18:
Executive Summary

Broccoli Grower Action Plan

6.9/10

Consumers have a relatively high level of satisfaction for broccoli.

1.

Insight:

Seasonal peaks and troughs are impacting on consumption and freshness, which peak in winter months.

Recommendation:

Investigate supply over warmer months when consumption drops away. Can growing in more states and territories provide year-round peak supply?

2.

Insight:

Consumers are routinely consuming broccoli at dinner meal occasions.

Recommendation:

Provide inspiration to consumers on lunch-time salads that appeal to alternative meal occasions, or a broccoli gratin for breakfast consumption. This should help broaden broccoli repertoire and increase meal occasions.

3.

Insight:

Awareness of broccoli types remains very low.

Recommendation:

Engage consumers in the category by providing greater information around varieties available.

Chillies Grower Action Plan

7.2/10

Recommendations and word of mouth is high amongst chilli consumers, which is a great way to encourage new users into the category.

1.

Insight:

Increased future purchase amongst current users is very high.

Recommendation:

Continue to grow chilli that meets consumers need for taste and flavour, highlighting these attributes on pack and in-store to continue growth in the market.

2.

Insight:

Chilli is being used by younger age groups, and less likely to be consumed by 55+ years old.

Recommendation:

To encourage older consumers to purchase more chillies promote value for money (expense being a barrier to purchase), that a little bit of chilli goes a long way. High price per kilo (ie. $16.72) may scare off some consumers, also indicate price per chilli (which is usually less than $1.00).

3.

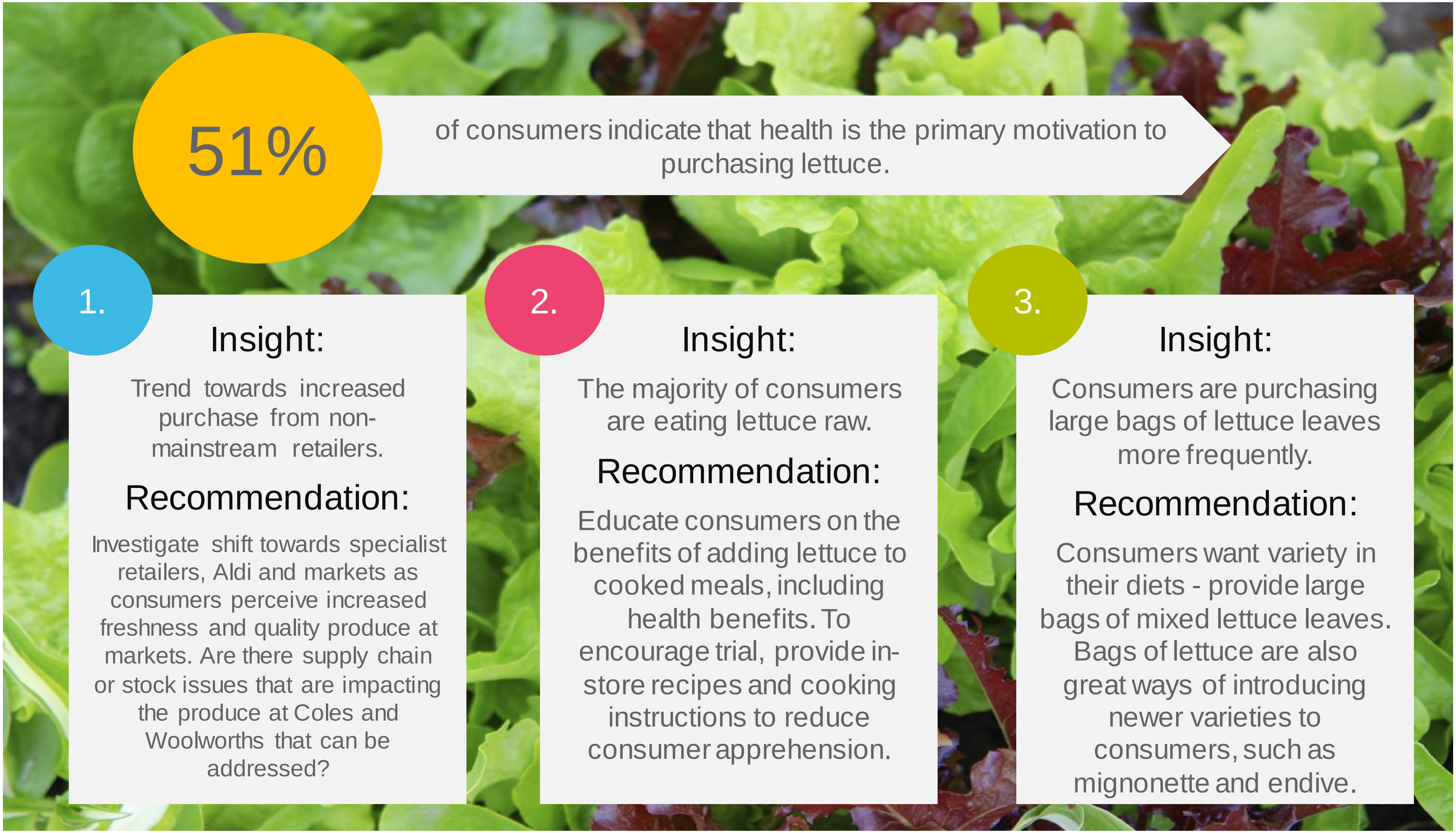
Insight:

Chillies are primarily cooked in Asian cuisine.

Recommendation:

In-store provide consumers with recipe cards with alternative cuisines, such as Australian, which is more commonly cooked by older consumers.

Lettuce Grower Action Plan



51% of consumers indicate that health is the primary motivation to purchasing lettuce.

1.

Insight:

Trend towards increased purchase from non-mainstream retailers.

Recommendation:

Investigate shift towards specialist retailers, Aldi and markets as consumers perceive increased freshness and quality produce at markets. Are there supply chain or stock issues that are impacting the produce at Coles and Woolworths that can be addressed?

2.

Insight:

The majority of consumers are eating lettuce raw.

Recommendation:

Educate consumers on the benefits of adding lettuce to cooked meals, including health benefits. To encourage trial, provide in-store recipes and cooking instructions to reduce consumer apprehension.

3.

Insight:

Consumers are purchasing large bags of lettuce leaves more frequently.

Recommendation:

Consumers want variety in their diets - provide large bags of mixed lettuce leaves. Bags of lettuce are also great ways of introducing newer varieties to consumers, such as mignonette and endive.

Sweet Corn Grower Action Plan

78% of consumers indicate that their expectation of corn freshness is generally met, which is consistent across waves.

1.

Insight:

There is increased motivation to purchase sweet corn because the whole family likes it.

Recommendation:

Highlight family-friendly meals on the pack, with milder flavours that are suitable for children. Provide ideas where children can be involved in the cooking of corn to engage the whole family.

2.

Insight:

Small trays are becoming increasingly popular across waves.

Recommendation:

Highlight convenience factors of pre-packed corn, including de-husked cobs to save time and energy in the kitchen. Investigate optimal small tray size, whether it contains 3 or 4 cobs to appeal to the greatest number of consumers.

3.

Insight:

Expense remains a barrier to future purchase.

Recommendation:

Communicate value for money propositions in-store, such as Australian grown and de-husked options. If there are specific reasons for price increase, such as weather events, clearly communicate to consumers.

Wave 18: Fast Facts
(1 of 2)

Broccoli:

- Broccoli has positive endorsement to family and friends and holds high importance to consumers.
- On average broccoli is purchased 4.3 times per month and consumed on 10 occasions per month. Mainstream retailers are the main purchase locations.
- Consistent with previous months, 700g of broccoli is typically purchased. This is considered good value for money by consumers. Individual heads of broccoli are the preferred format.
- National pricing analysis revealed an average of $3.79 per kilo, which is lower than July 2014 prices.
- Overall awareness of broccoli types remains low, with over half of consumers unable to recall any variety of broccoli.
- The key motivations for purchasing broccoli are health and nutrition factors. The main barriers to purchase are already consuming enough for their needs and wanting a variety of vegetables in their diet.
- Broccoli is expected to remain fresh for a week. Expectations of freshness are in line with previous waves and are generally met.

Chilli:

- There is a high level of interest in new varieties of chillies. Future purchase intent amongst current chilli consumers was considerably high, with over a quarter of consumers indicating they would purchase more than they currently do.
- Chilli purchase and consumption are higher than the previous wave, with purchase on average 4.0 times per month and consumed 13.0 times per month.
- Consumers generally purchase 300g of chillies, with recalled last spend up at $4.60. Overall, chilli is deemed good value for money (6.3/10).
- Pricing analysis revealed the average national price for long red chillies was $16.72, in line with July 2014 prices.
- There is a high level of recall for chilli varieties. Jalapeno and birds eye have the greatest awareness amongst consumers.
- Main triggers for purchasing chillies are using as an ingredient in dishes and taste. The key barriers to purchase are consuming enough for their needs and consumers growing their own.
- Chillies are expected to remain fresh for over 11 days, and this freshness is met most of the time.

Wave 18: Fast Facts
(2 of 2)

Lettuce:

- Lettuce holds high levels of importance with consumers and there is strong future purchase intent heading into warmer months.
- Lettuce is purchased on average 5.6 times per month and consumed frequently, 15.7 occasions per month. Purchase and consumption are up on previous waves.
- Consistently , 800g of lettuce is purchased per shop. Recalled last spend was $3.70. Value for money has stabilised at 6.1/10, being perceived as fair value.
- Price tracking revealed an average price of $2.07 per Iceberg lettuce head. This is slightly down on previous months.
- There is a high level of awareness of lettuce types, especially Iceberg and Cos.
- The main motivations to purchasing lettuce are health and complementing other food. Already consuming enough and short shelf life are the key barriers to purchase.
- Lettuce is expected to stay fresh for over a week. Expectations of freshness were met most of the time, up from previous waves.

Sweet corn:

- Consumers were likely to recommend sweet corn to family and friends. There were also good levels of interest in new varieties.
- Purchase frequency of sweet corn was 3.6 times per month and on average was consumed 6.7 occasions per month, which slightly up on previous trends.
- In line with past waves, 900g of sweet corn is purchased. Perceived value for money was higher (6.5/10) and considered good value for money.
- Analysis of pricing nationally revealed average price of $1.20 per cob. This was consistent with March 2014 prices.
- Awareness of sweet corn remains very low, with three quarters of consumers unable to recall a type.
- Taste is the primary trigger to purchase. Wanting variety and consuming enough for their needs are the main barriers to purchase.
- Consumers expect sweet corn to remain fresh for approximately 8 days, and this longevity is likely to be met most of the time.

Wave 18:
Ad-Hoc Questions

There are mixed perceptions about vegetables purchased from mainstream retailers compared with specialist retailers. Some differences included freshness, quality and price.

"If you buy direct from growers it is fresher and tastes better because they have not been in cold-rooms for long periods. I find quality differs in ALL shops."

"I think the independents can adapt to different varieties quicker. That is they are free to buy whatever they see as good value or experiment with new varieties or have a greater variety available."

Horticulture Innovation Australia

colmar brunton.

Markets and Local Green Grocers had the greatest perceived freshness, substantially greater than mainstream retailers.

IGA and Aldi were perceived to have the least fresh produce.

Perceived Freshness

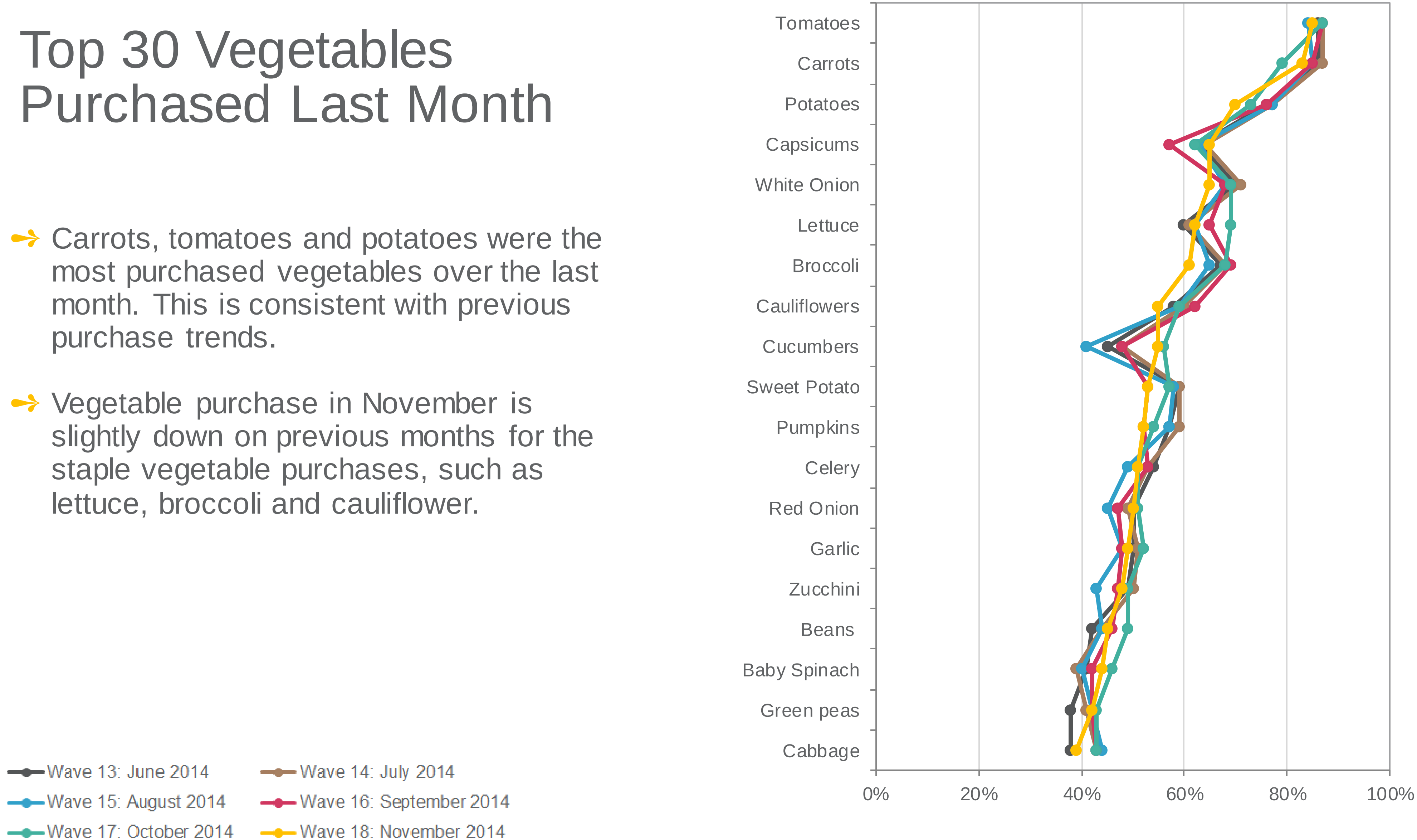
Markets	Green Grocer	Premium	Woolworths	Coles	Independents	Aldi
8.1/10	7.4/10	6.3/10	6.1/10	6.0/10	5.6/10	5.4/10

AHQ2. What is your perceived freshness of vegetables from the following retailers?
N=734

Wave 15: Overall Vegetable Tracking

Top 30 Vegetables Purchased Last Month

- Carrots, tomatoes and potatoes were the most purchased vegetables over the last month. This is consistent with previous purchase trends.
- Vegetable purchase in November is slightly down on previous months for the staple vegetable purchases, such as lettuce, broccoli and cauliflower.



Sample Wave 18 N=1530
S8. Which of the following fresh vegetables have you purchased in the last month?

Horticulture Innovation Australia
colmar brunton.

Category Health Explained

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

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

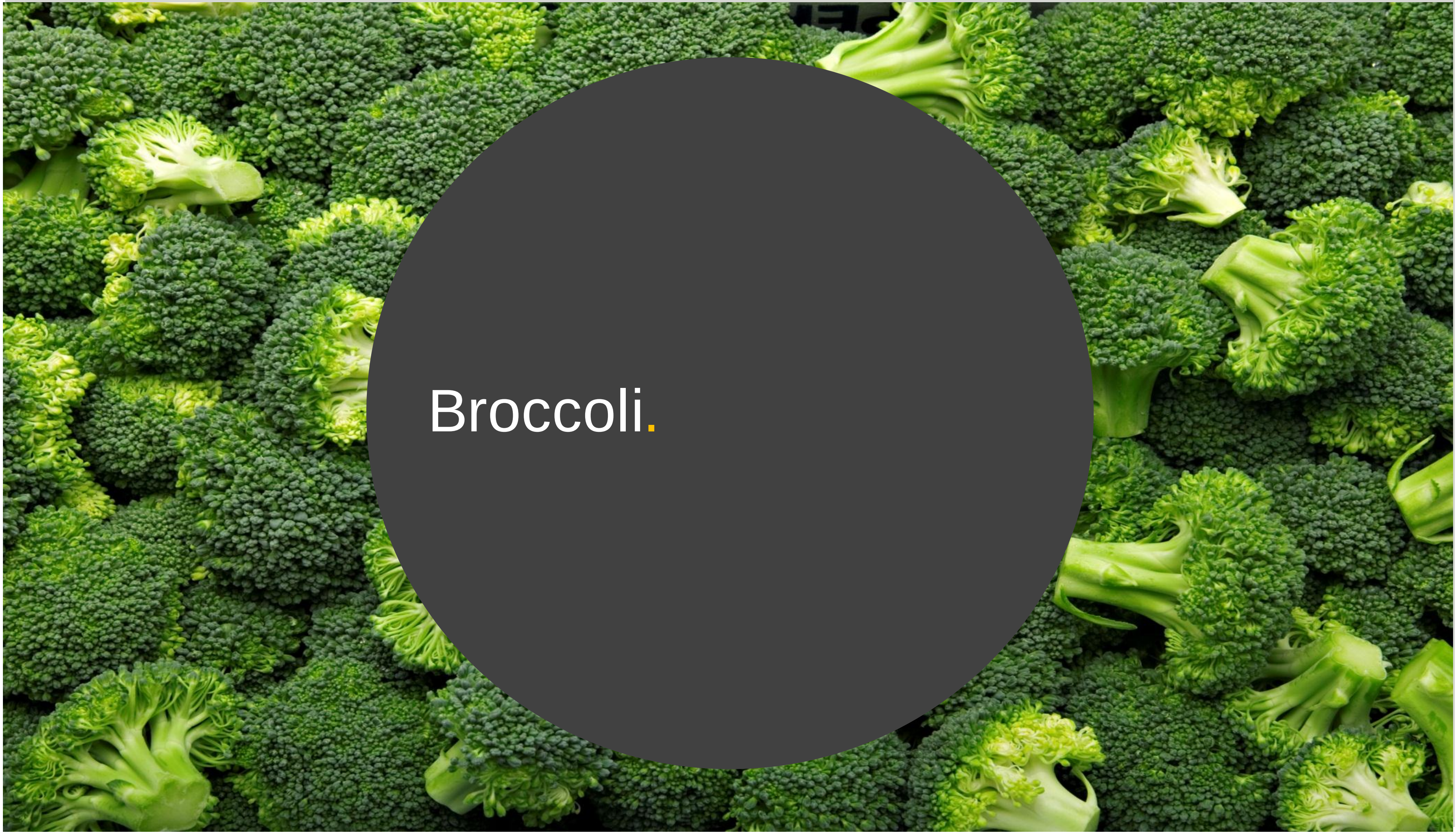
- How **important** to you is having a range of *commodity* available in the store where you usually shop?
- How **satisfied** or dissatisfied are you with the range of *commodity* currently available?
- How likely would you be to **recommend** *commodity* to your family and friends?
- How interested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

Category health and consumer sentiment remains strong for this month's vegetables.

Chillies, Lettuce and Sweet Corn all have positive future purchase intent, above the Harvest Mean.

	Broccoli	Chillies	Lettuce	Sweet Corn	Harvest Total Mean
Importance	6.5	7.1	7.2	6.4	6.3
Satisfaction	6.9	6.2	6.8	6.7	6.6
Endorsement	7.2	7.2	6.8	7.1	6.8
Interest (New Varieties)	6.0	7.0	6.5	6.4	6.1
Future Purchase More Same Less	 9% 90% 1%	 27% 71% 3%	 17% 81% 2%	 16% 82% 2%	 14% 84% 2%

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


Broccoli.

Broccoli is typically purchased once a week and consumed 10 times per month.

Mainstream retailers remained key purchase channels this month.

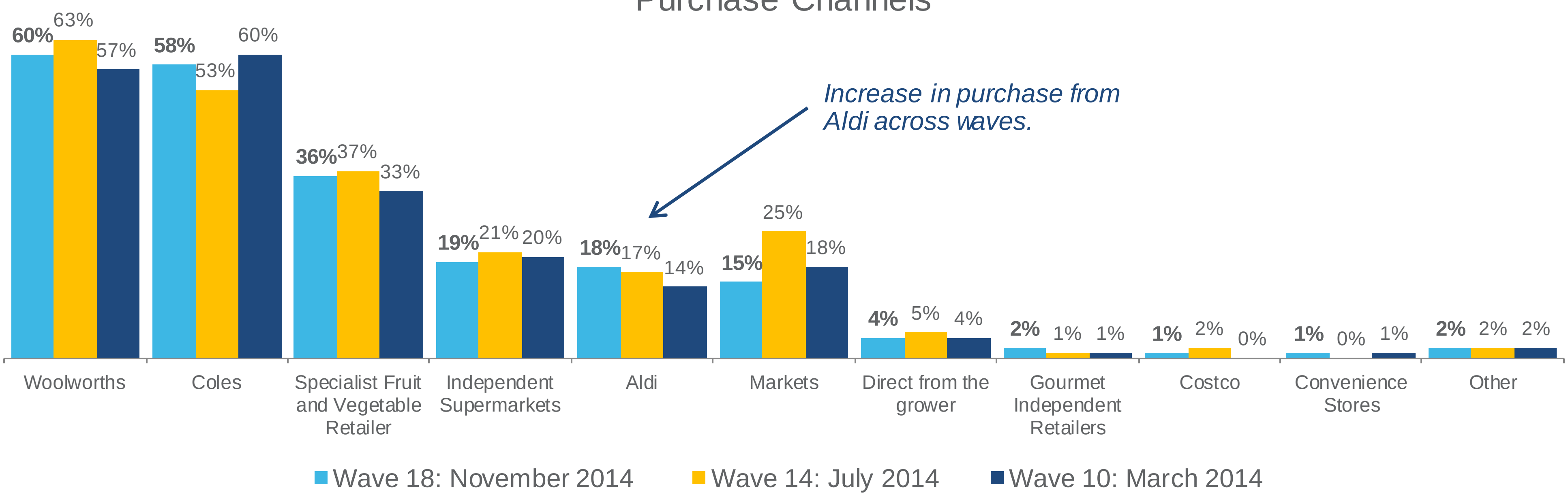
Average Purchase
4.3 times
per month

– 4.3 times, Wave 10
▲ 4.6 times, Wave 14

Average Consumption
10.0 times
per month

▼ 9.9 times, Wave 10
▲ 10.1 times, Wave 14

Purchase Channels



Q1. On average, how often do you purchase <commodity>?
Q2. On average, how often do you consume <commodity>?
Q5. From which of the following channels do you typically purchase <commodity>?
Sample Wave 6 N=370, Wave 10 N=322, Wave 14 N=314

Horticulture Innovation Australia

colmar brunton.

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

Average Spend and Price Sensitivity

Average weight of purchase

The average consumer typically purchased **700g** of Broccoli in November 2014, which is in line with previous months.

— 700g, Wave 10
▲ 800g, Wave 14

Recalled last spend

The average recalled last spend was **$3.50,** which is consistent with March this year.

— $3.50, Wave 10
▲ $3.70, Wave 14

Value for money

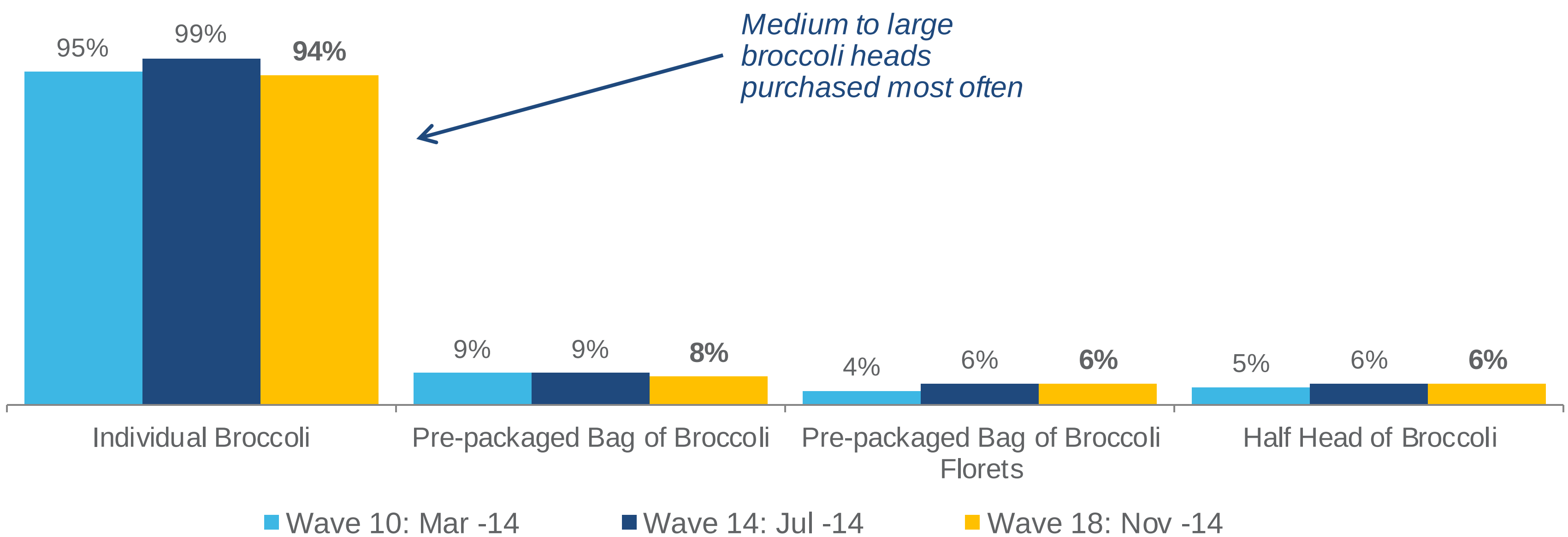
On average, consumers perceived Broccoli to be fair value **(6.4/10)** in November, which represents a upward trend across waves.

▼ 6.1/10, Wave 10
▼ 5.9/10, Wave 14

Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 6 N=370, Wave 10 N=322, Wave 14 N=314

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

Individual broccoli heads are consistently purchased, other formats are not as popular with consumers.

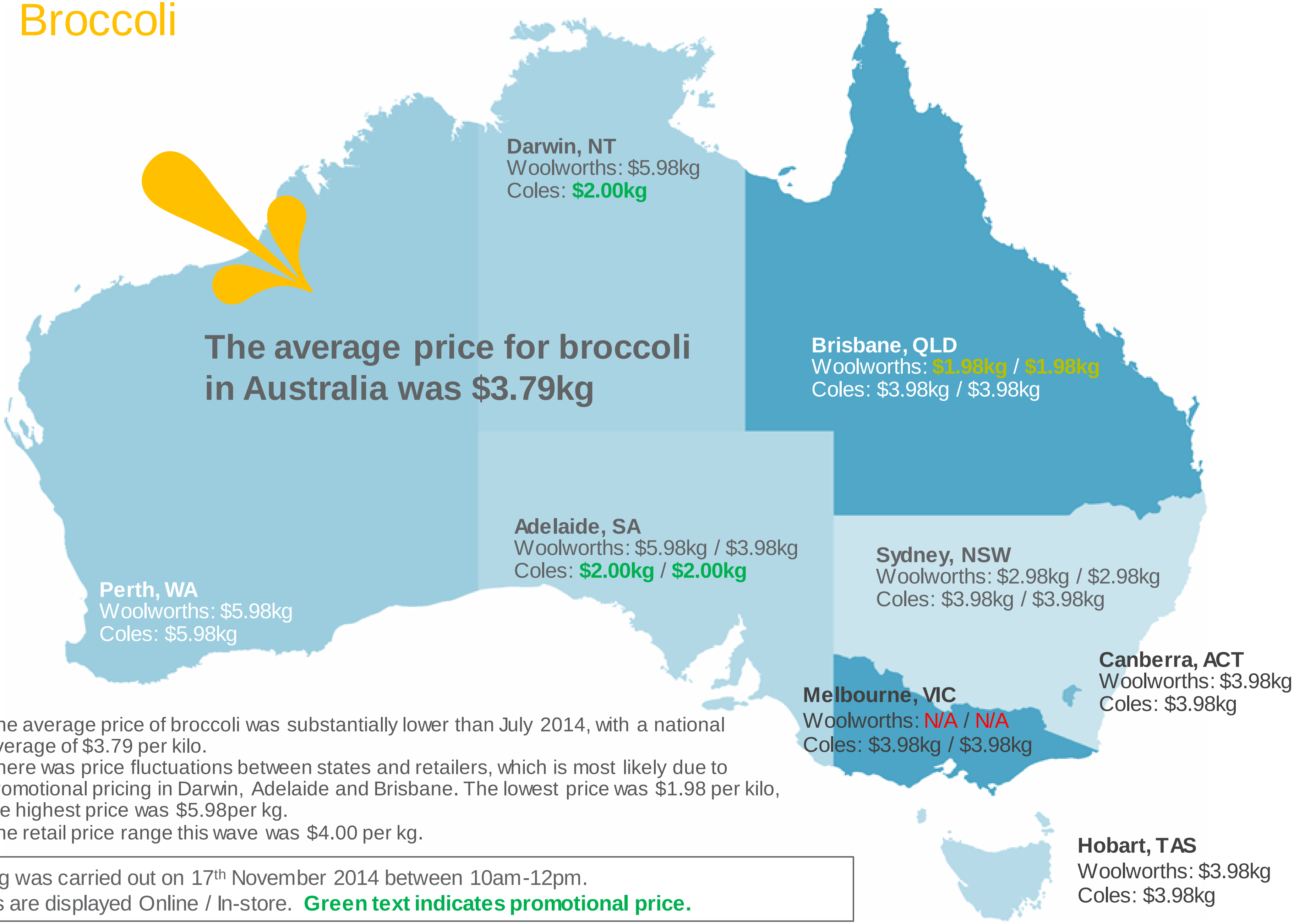


Average amount purchased per shop	Individual Broccoli	Pre-packaged Bag of Broccoli	Half Head of Broccoli	Pre-packaged Bag of Broccoli Florets
Wave 10: March 2014	1.9	1.3	1.4	1.5
Wave 14: July 2014	2.1	1.0	1.6	1.4
Wave 18: November 2014	1.8	1.5	1.2	1.5

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

Online and In-store Commodity Prices

Broccoli



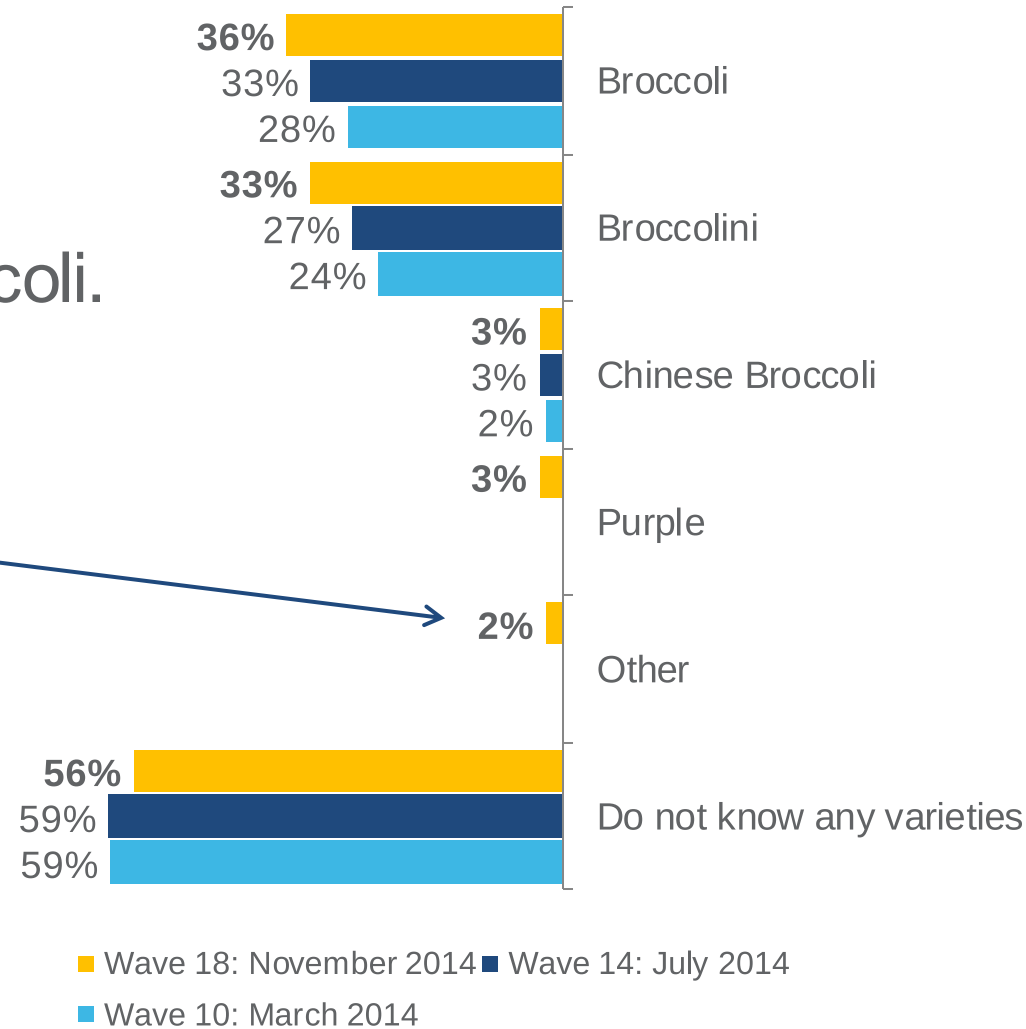
- The average price of broccoli was substantially lower than July 2014, with a national average of $3.79 per kilo.
- There was price fluctuations between states and retailers, which is most likely due to promotional pricing in Darwin, Adelaide and Brisbane. The lowest price was $1.98 per kilo, the highest price was $5.98per kg.
- The retail price range this wave was $4.00 per kg.

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

The level of broccoli awareness has remained consistent across waves.

However, more consumers have been able to recall 'broccolini' as a type of broccoli.

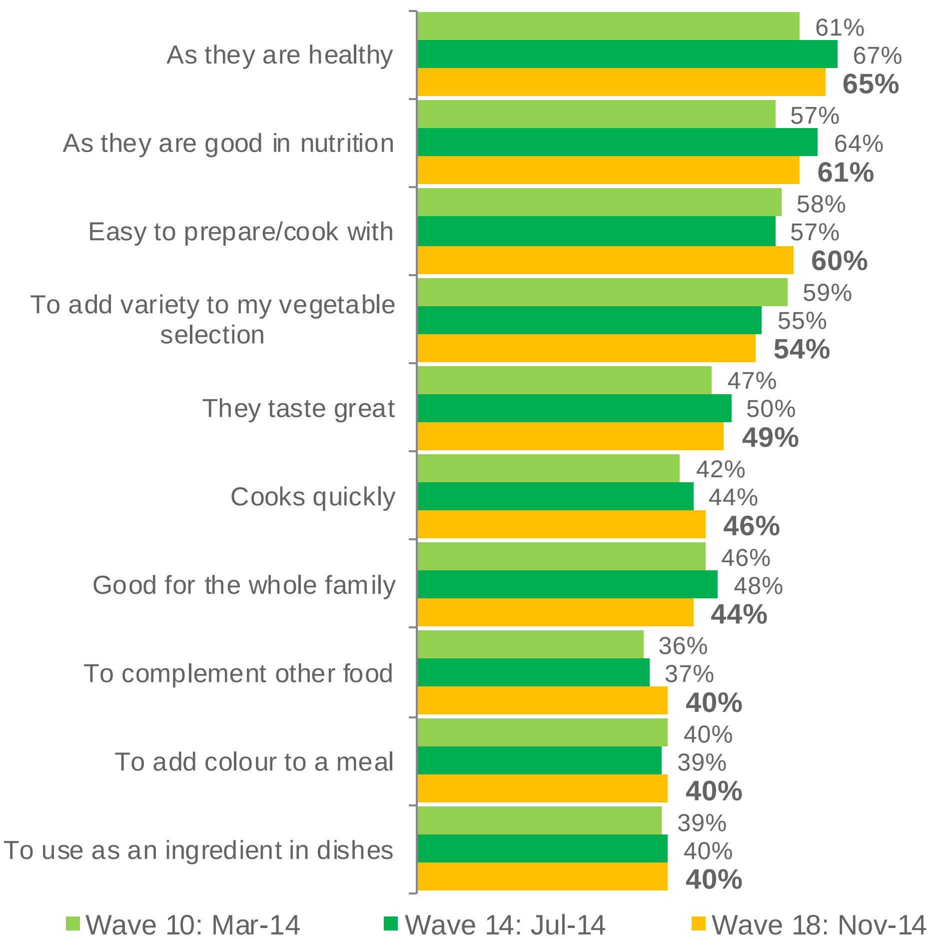
Other varieties recalled are Romanesco, Belstar and Arcadia.



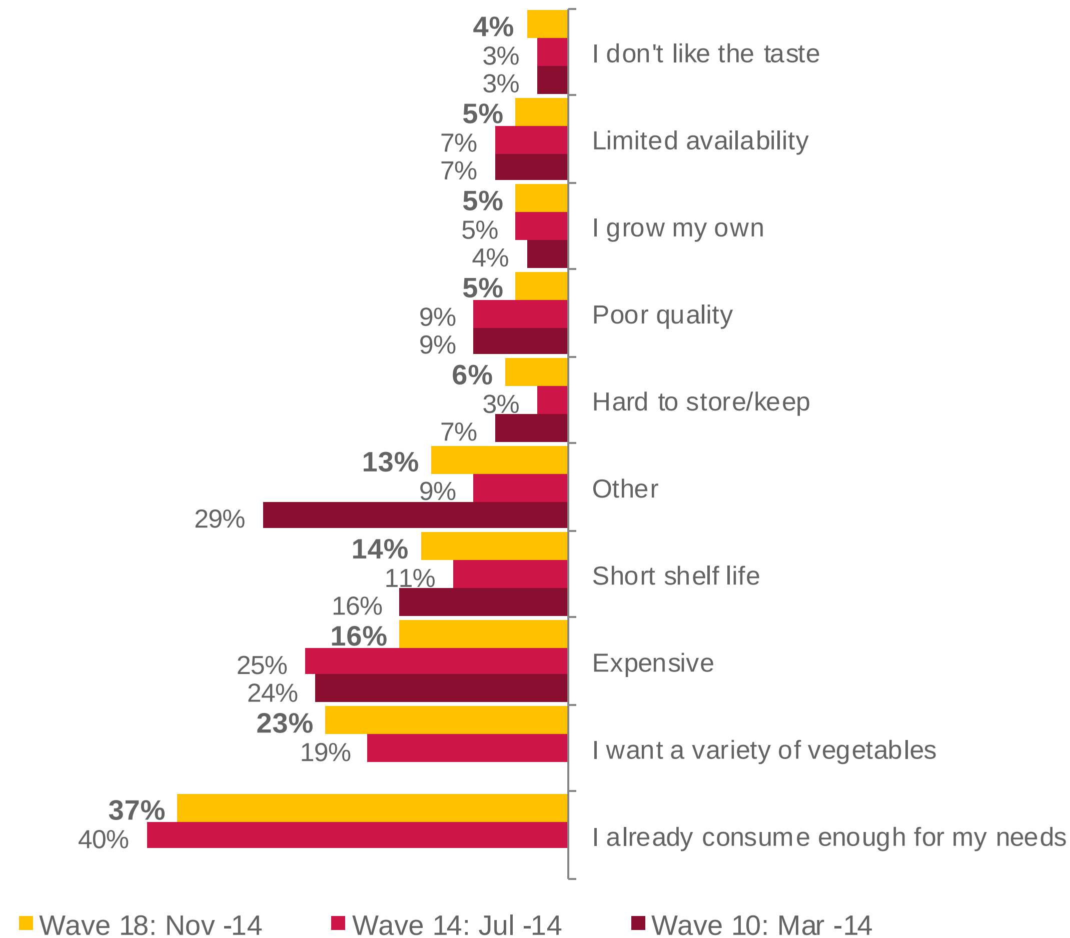
Q6a. What varieties of <commodity> are you aware of? (unprompted)
Sample Wave 6 N=370, Wave 10 N=322, Wave 14 N=314

Health continues to be the key trigger to future purchase. Perceptions of already consuming enough and wanting variety are the main barriers to purchase.

Triggers



Barriers



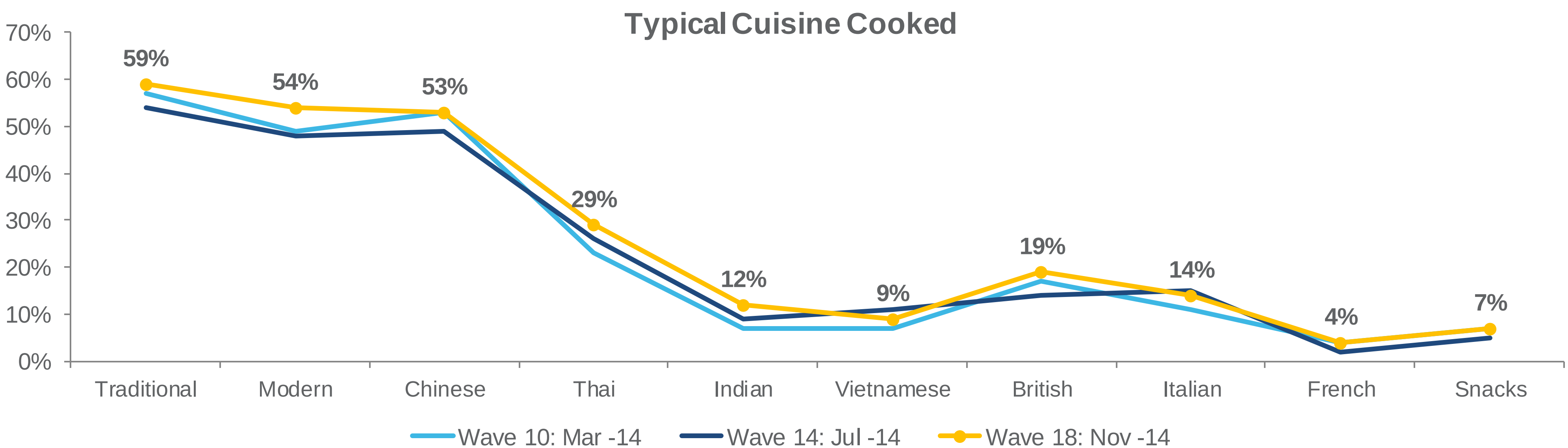
Sample Wave 6 N=370, Wave 10 N=322, Wave 14 N=314
Q7. Which of the following reasons best describes why you purchase <commodity>?
Q8. Which reason best describes why you don't buy <commodity> more often?

Consumers prefer to eat broccoli at dinner time.

Cuisine cooking is consistent across waves, with Australia remaining prominent.

Wave 18 Top 5 Consumption Occasions

	Wave 18	Wave 14	Wave 10
Weekday Dinner	**67%**	65%	64%
Weekend Dinner	**45%**	43%	41%
Family meals	**39%**	39%	42%
Everyday	**37%**	33%	34%
Quick Meals	**28%**	27%	24%



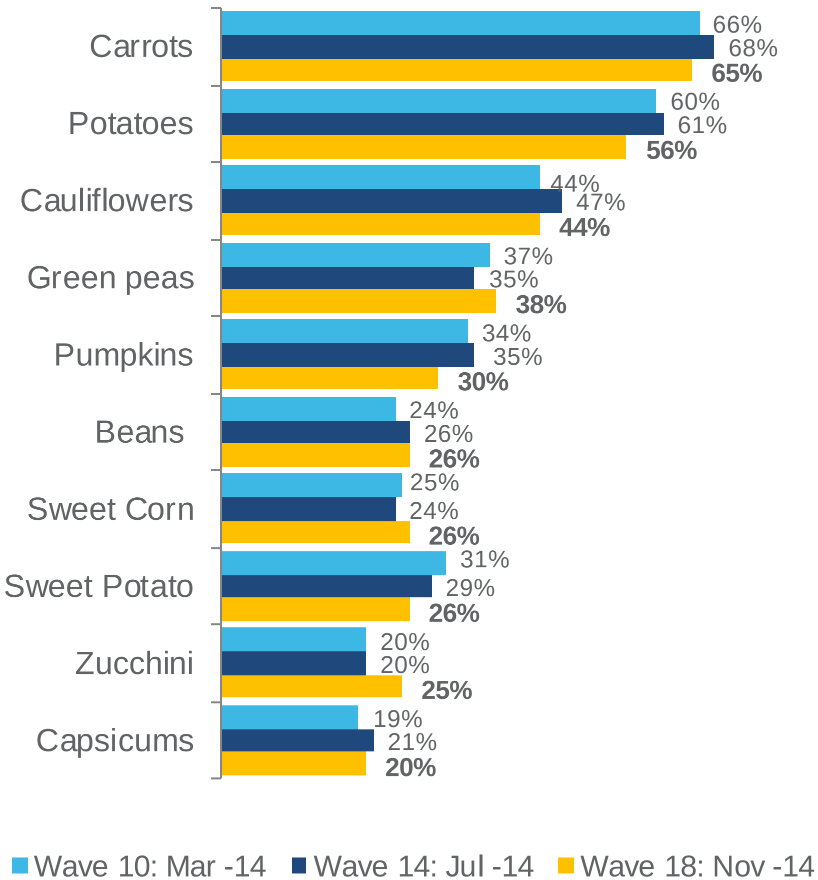
Australian Asian European Snacks

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

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

Broccoli is generally steamed and stir-fried. Carrots, potatoes and cauliflowers are most likely served in combination with broccoli.

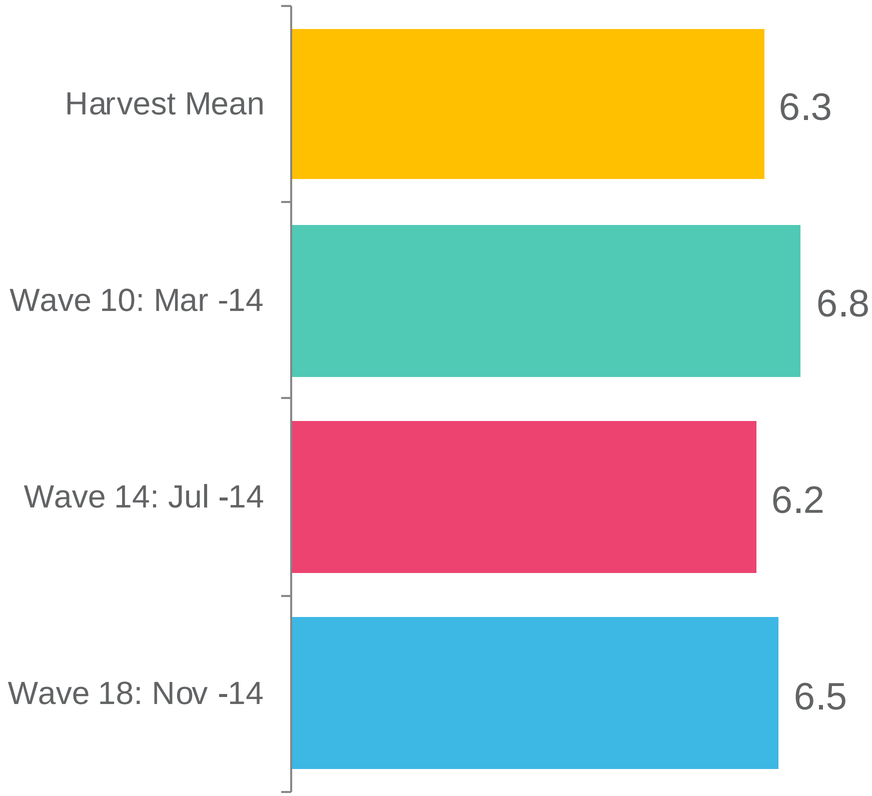
Top 10 Accompanying Vegetables



Top 10 Cooking Styles			
	Wave 10	Wave 14	Wave 18
Steaming	61%	65%	65%
Stir frying	51%	50%	48%
Boiling	32%	32%	33%
Microwave	32%	29%	31%
Blanche	12%	10%	13%
Soup	10%	16%	13%
Raw	10%	11%	9%
Sautéing	10%	9%	8%
Stewing	6%	9%	7%
Roasting	4%	5%	5%

Sample Wave 6 N=370, Wave 10 N=322, Wave 14 N=314
Q9. How do you typically cook <commodity>?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?

Importance of provenance is up from July 2014 and in-line with consumers' perceptions for all commodities tracked.

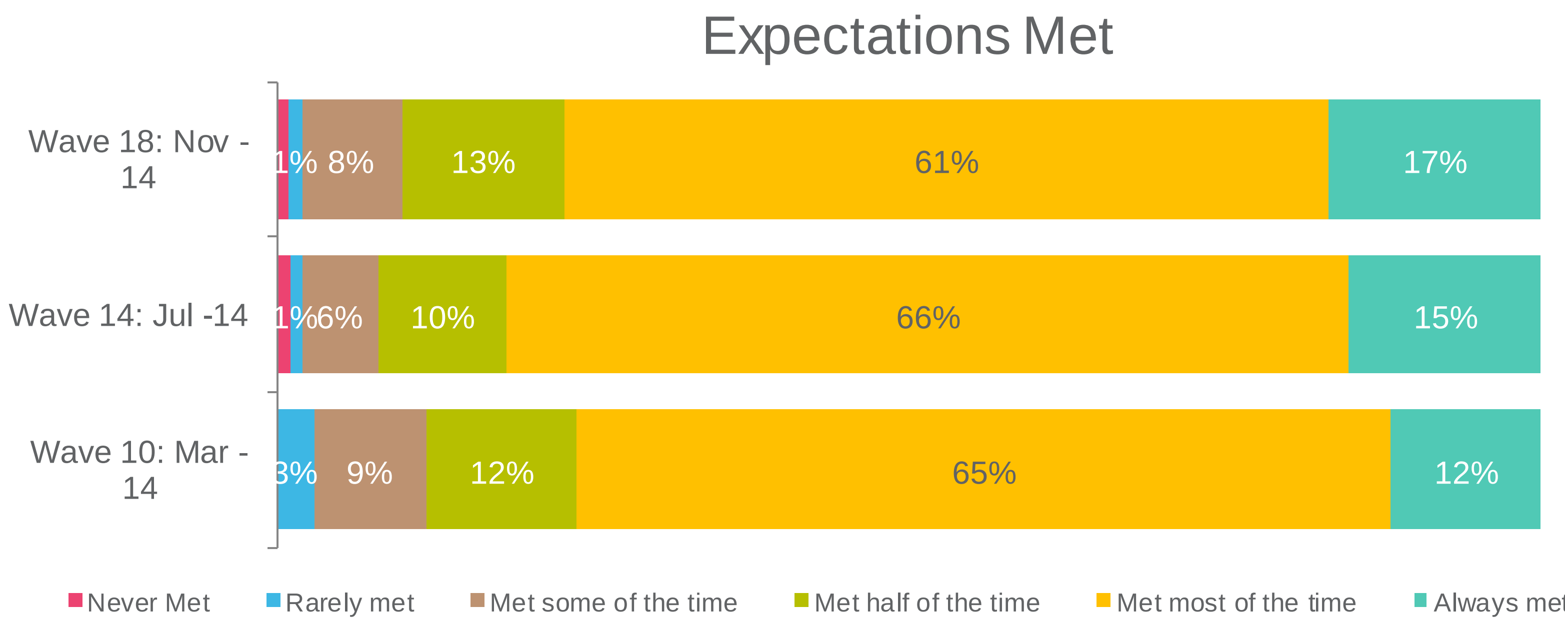


Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 6 N=370, Wave 10 N=322, Wave 14 N=314

Once purchased, broccoli is expected to remain fresh for one week. Compared with previous waves, expectations are more likely to always be met.

Expected to stay fresh for **7.1** days

7.1 days, Wave 10
7.3 days, Wave 14



Sample Wave 6 N=370, Wave 10 N=322, Wave 14 N=314
Q12. How long do you expect <commodity> to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy <commodity> ?

Horticulture Innovation Australia
colmar brunton.

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

Trends: Broccoli

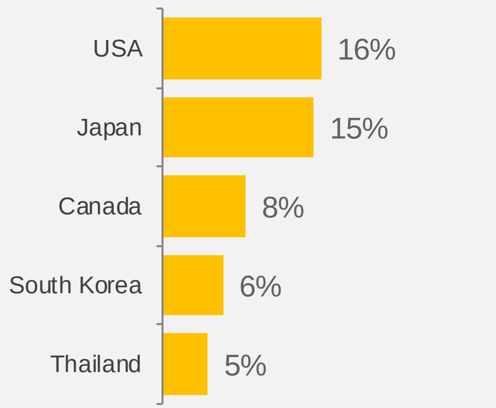
Broccoli Global NPDs

September – November 2014

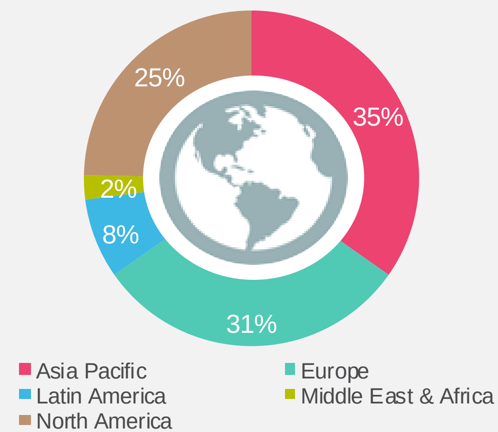
There were 259 new broccoli products launched globally over the last 3 months. Top categories for launch were meals and fruit and vegetables. These launches occurred primarily across Asia Pacific, Europe and North America.

259 Global NPDs

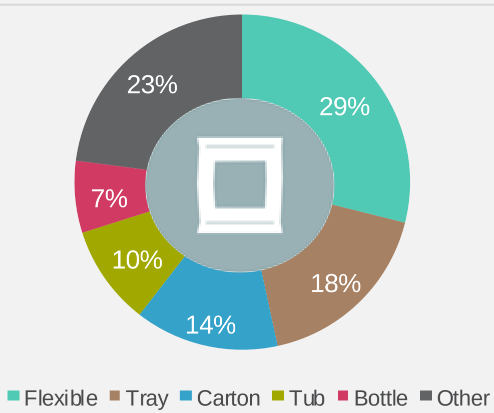
Country



Region



Top Pack Formats



Categories

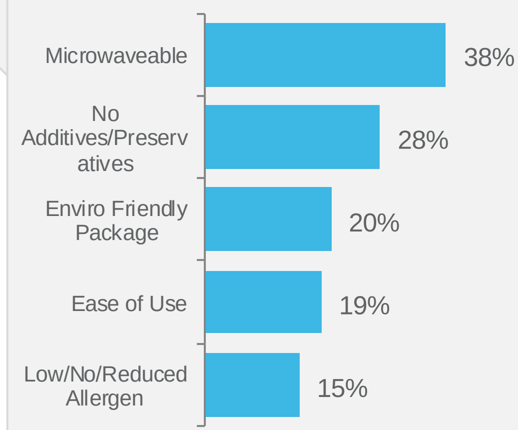
Meals 26%

Fruit & Vegetables 20%

Juice Drinks 10%

Baby Food 9%

Top Claims



Broccoli Product Launches:
Last 3 Months (September – November 2014)
Summary

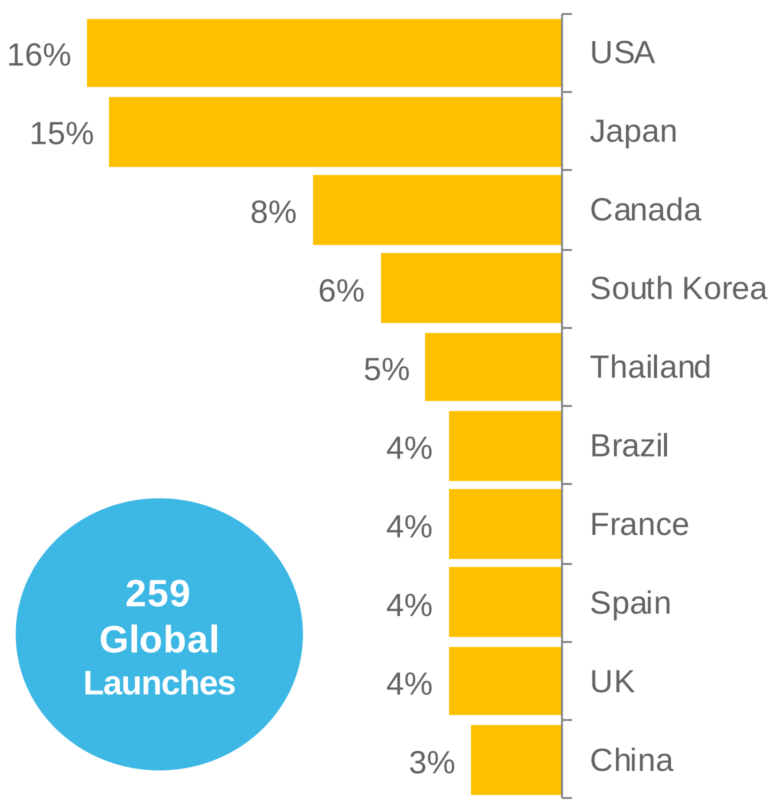
- A total of 259 products containing broccoli as an ingredient were launched globally within the last 3 months, which is slightly down on past trends.
- There are three products containing broccoli launched in Australia in the past 3 months, all meal products (see upcoming slide for more detail).
- Asia Pacific (35%), Europe (31%) and North America (25%) remain the top regions for broccoli product launches.
- Flexible pack formats (29%) are the predominant form of packaging for launches in the last 3 months. This is consistent with all previous waves tracked.
- The top categories for launches were meals (26%), fruit and vegetable products (20%), and juice drinks (10%).
- The core claims used for launches centred around convenience and health, with microwaveable being the top claim (38%), no additives or preservatives (28%) and environmentally friendly packaging (20%).
- The most innovative launches found are broccoli slaw and broccoli spread (see upcoming slides for more detail).

Source: Mintel (2014)

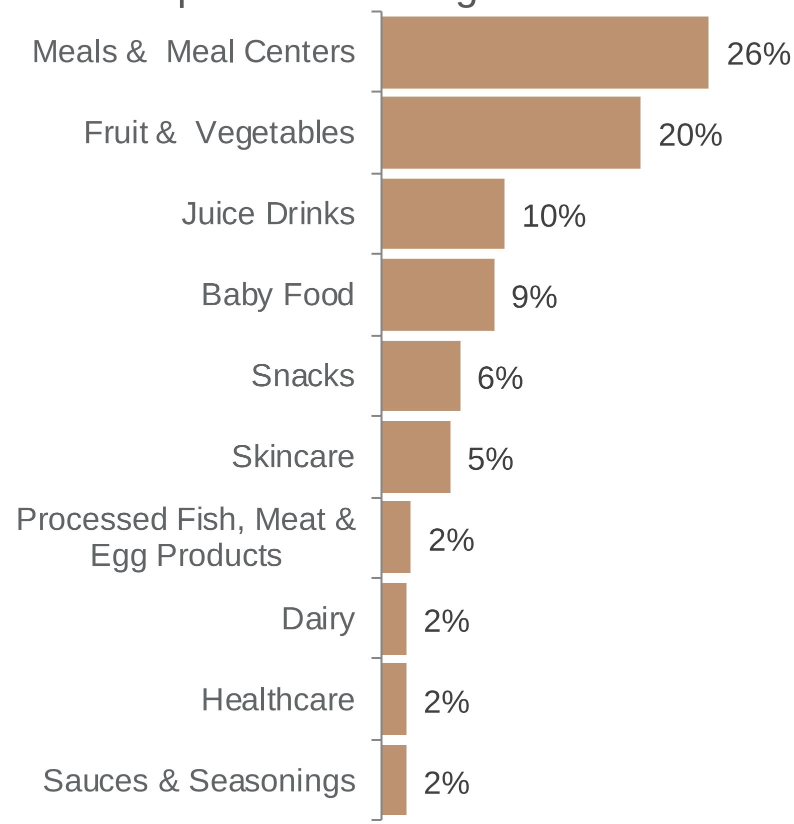
USA and Japan are the dominant countries for broccoli product launches.

Meals, fruit & vegetables and juice drinks remain the main product categories.

Top Launch Countries



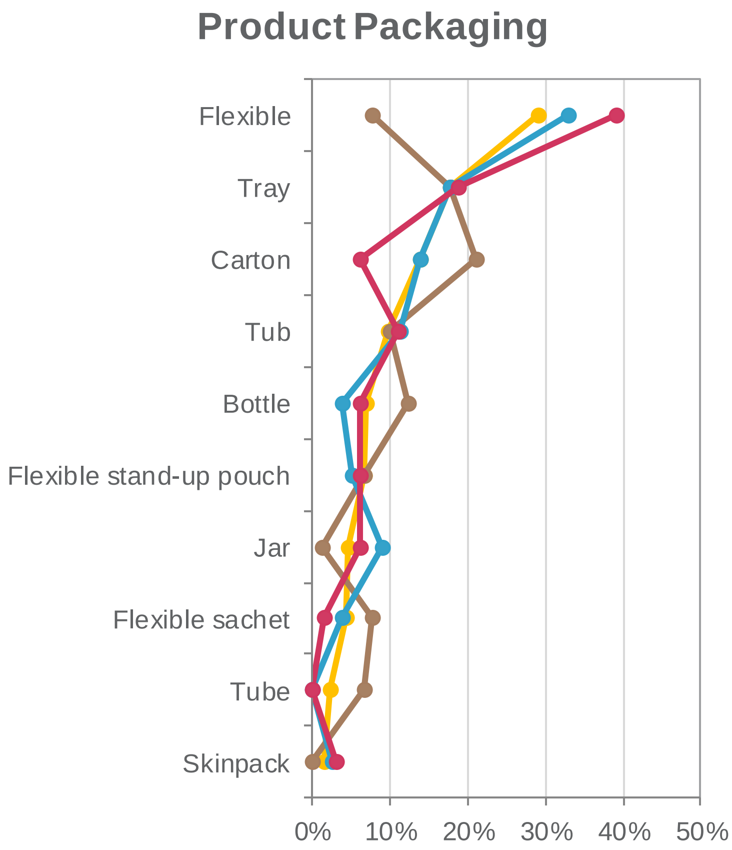
Top Launch Categories

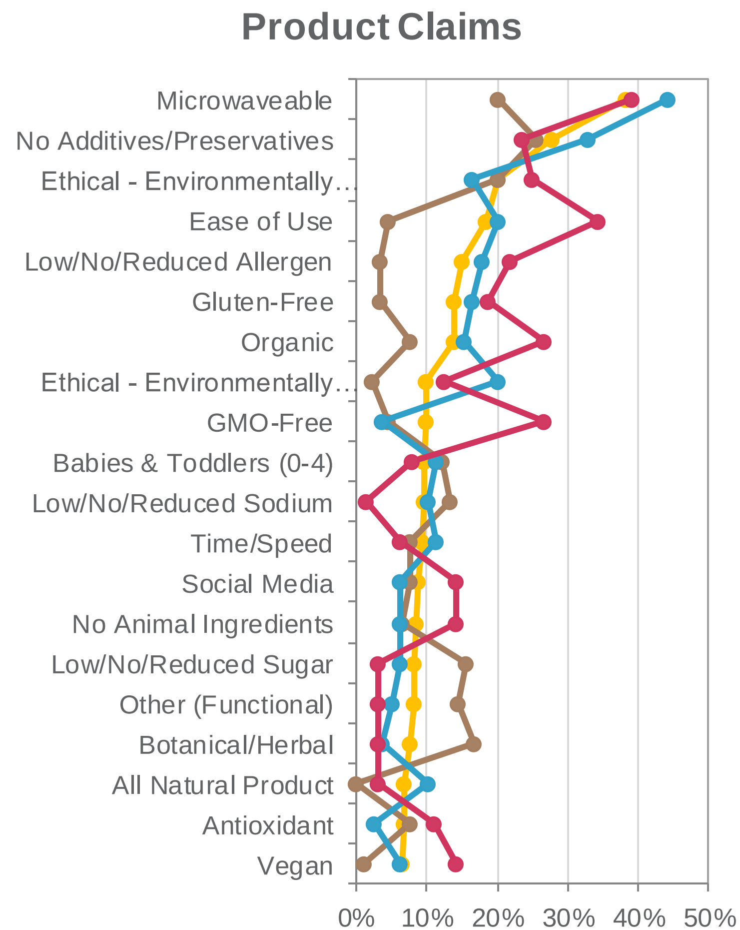


Horticulture Innovation Australia
colmar brunton.

Microwavable is the most used claim on broccoli products, indicating convenience-based products.

Flexible packaging it utilised across regions, however cartons appear most popular in Asia Pacific.





Global (N=259) Asia Pacific (N=90)
Europe (N=79) North America (N=64)

Only regions with n >30 are displayed

Innovative Broccoli Launches:
L3M (September – November 2014)

Good Goût Organic Broccoli, Quinoa & Ricotta (France)

Good Goût Brocolis Quinoa Ricotta (Organic Broccoli, Quinoa & Ricotta) contains 62% broccoli, just the right amount of ricotta, a little water and nothing else. It contains food lumps, is suitable for babies from 12 months of age and can be heated in a bain-marie or microwave.

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

Innisfree Pure Green Baby Sun Cream SPF 30 PA++ (Singapore)

Innisfree Pure Green Baby Sun Cream SPF 30 PA++ is formulated with green tea from Jeju Island to soothe and moisturise baby's skin and Green Calming Complex. It features a mild formula with 100% natural mineral UV filter for sensitive skin, containing 99.9% of natural origin ingredients and 12.3% from organic farming.

Claims:
Mineral Oil/Petroleum Free, Vitamin/Mineral Fortified, Silicone Free, For Sensitive Skin, Botanical/Herbal, Ethical - Environmentally Friendly Package, UV Protection, Organic, No Animal Ingredients, Babies & Toddlers

ICA Gott Liv Fresh Focus Power Blend Mix (Sweeden)

ICA Gott Liv Fresh Focus Power Blend Mix comprises broccoli, baby spinach, mache and dried mint to be blended with apple juice to make a drink. This mix is pre-washed and is ready to use, and is rich in folic acid which contributes towards reduction of tiredness and fatigue. The product retails in a 65g pack.

Claims:
Other (Functional), Low/No/Reduced Fat, Low/No/Reduced Sugar, Ease of Use, Low/No/Reduced Sodium, Antioxidant, Cardiovascular (Functional), Bone Health

Fleury Michon Le Soufflé Broccoli & Salmon Souffle (France)

Fleury Michon Le Soufflé Brocolis Saumon (Broccoli & Salmon Souffle) is made in the Vendée region and cooked at low temperature in its aluminium tray. It is free from preservatives, colourings, palm oil, hydrogenated oils, gluten and flavour enhancers and can be oven heated in 10 minutes.

Claims:
No Additives/Preservatives, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Package, Social Media, Gluten-Free, Low/No/Reduced Transfat

Source: Mintel (2014)

Innovative Broccoli Launches:
L3M (September – November 2014)

Wegmans Food You Feel Good About Broccoli & Vermont White Cheddar Soup (USA)

Wegmans Food You Feel Good About Broccoli & Vermont White Cheddar Soup is now available. The heat and serve product is gluten free and retails in a 16 oz. pack.

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

Happy Munchies Baked Organic Cheese & Grain Snack (Philippines)

Happy Munchies Baked Organic Cheese & Grain Snack is said to be a perfect finger food, as it is firm enough for a child's little hands yet gentle enough for their developing gums. This USDA organic and kosher certified product contains broccoli, kale, and cheddar cheese, 32mg choline per serving for brain development,

Claims:
No Additives/Preservatives, Brain & Nervous System (Functional), Ethical - Environmentally Friendly Package, Kosher, Organic, Social Media, Babies & Toddlers (0-4), Wholegrain

Babies R Us Purely Simple Organic Mixed Greens & Pear Baby Food (USA)

Babies R Us Purely Simple Organic Mixed Greens & Pear Baby Food is a fruit and vegetable puree with a smooth texture suitable for babies six months of age and older. This stage two product is unsweetened and unsalted, is USDA organic and kosher certified, and retails in a 4-oz. BPA-free pouch.

Claims:
Organic, Low/No/Reduced Sodium, Kosher, Low/No/Reduced Sugar, Babies & Toddlers (0-4)

Daily Chef Hollands Broccoli with Meat Roll and Potatoes (Netherlands)

Daily Chef Hollands Broccoli met Boomstammetje en Aardappels (Broccoli with Meat Roll and Potatoes) is made to an original Dutch recipe and contains sauce. The microwaveable, cooked product retails in a 500g pack with separate compartments and serves one person.

Claims:
Ease of Use, Microwaveable

Source: Mintel (2014)

Innovative Broccoli Launches:

L3M (September – November 2014)

Green Giant Steamers Broccoli & Cheese Sauce (Mexico)

Green Giant Steamers Brócoli con Salsa de Queso (Broccoli & Cheese Sauce) is now available. This microwavable product retails in a 340g pack.

Claims:
Microwaveable

Gurmán Klub Broccoli Spread (Czech Republic)

Gurmán Klub Brokolicová Pomazánka (Broccoli Spread) is made with garlic, and can be served with bread or as a dip. The product retails in a 150g pack.

Claims:
N/A

Kagome Yasai Seikatsu 100 Kabosu Citrus Mix Juice (Japan)

Kagome Yasai Seikatsu 100 Kabosu Citrus Mix Juice has been relaunched as a seasonal variety. It has a refreshing and light flavour of kabosu citrus. It consists of 50% fruit juice content and 50% vegetable juice content. It is free from added sugar, salt and preservatives.

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

H-E-B Organics Broccoli Slaw (USA)

H-E-B Organics Broccoli Slaw is washed, ready to eat, and made via sustainable soil management methods. This USDA organic certified product is free from GMO's, grown using only organic compliant materials, and retails in a 10-oz. pack.

Claims:
No Additives/Preservatives, GMO-Free, Kosher, Ethical - Environmentally Friendly Product, Microwaveable, Ease of Use, Organic

Source: Mintel (2014)

Australian Broccoli Launches:
L3M (September – November 2014)

Super Nature Super Foods Mediterranean Polenta

Super Nature Super Foods Mediterranean Polenta is a slow cooked polenta topped with Mediterranean style sauce of sun dried tomatoes, mushrooms, black olives and cannellini beans, served with broccoli, red capsicum, spinach and topped with a sprinkle of cheese. The microwavable product is free from gluten, preservatives, artificial colours and flavours.

Claims:
No Additives/Preservatives, Low/No/Reduced Calorie, High/Added Fiber, Other (Functional), Low/No/Reduced Fat, Microwaveable, Vegetarian, Low/No/Reduced Glycemic, Gluten-Free, Antioxidant, Wholegrain

Lean Cuisine Malaysian Chicken Laksa Soup

Lean Cuisine Malaysian Chicken Laksa Soup combines aromatic curry flavours with a light and creamy coconut broth, succulent chicken, tender noodles and vegetables. This soup is 97% fat free, contains a full serve of vegetables, is free from artificial colours, flavours or preservatives, has less than 200 calories per serve, and is low in cholesterol.

Claims:
No Additives/Preservatives, Low/No/Reduced Cholesterol, Low/No/Reduced Calorie, Ethical - Environmentally Friendly Package, Low/No/Reduced Fat, Time/Speed, Microwaveable, Ease of Use, Slimming, Social Media

Super Nature Super Foods Thai Beef with Quinoa and Brown Rice

Super Nature Super Foods Thai Beef with Quinoa and Brown Rice is described as a kaffir lime leaf Thai beef served with kale, broccoli, red capsicum, pumpkin and pepita seeds, served on a pilaf of white quinoa and brown rice. The microwavable product is free from fat, gluten, preservative, artificial colours and flavours.

Claims:
No Additives/Preservatives, Low/No/Reduced Calorie, High/Added Fiber, Other (Functional), Low/No/Reduced Fat, Microwaveable, Vegetarian, Low/No/Reduced Glycemic, Gluten-Free, Antioxidant, Wholegrain, Cardiovascular (Functional),

Source: Mintel (2014)

Chillies.

Purchase and consumption are up from last wave.

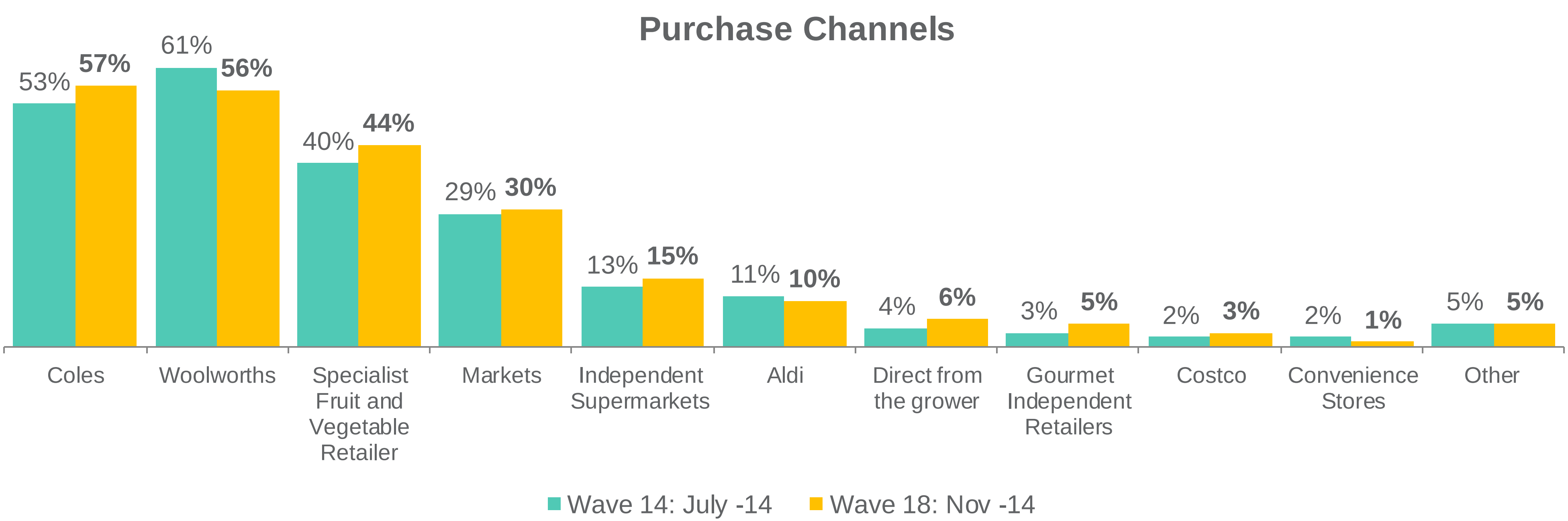
Mainstream and specialist retailers are the main purchase locations for chillies.

Average Purchase **4.0** times per month

▼ 3.6 times, Wave 14

Average Consumption **13.0** times per month

▼ 12.0 times, Wave 14



Q1. On average, how often do you purchase <commodity>?
Q2. On average, how often do you consume <commodity>?
Q5. From which of the following channels do you typically purchase <commodity>?
Sample Wave 14 ,N=261

Average Spend and Price Sensitivity

Average weight of purchase

The typical consumer purchased **300g** of chillies, consistent with the previous wave.

— 300g, Wave 14

Recalled last spend

Recalled last spend on chilli purchase was **$4.60,** up substantially compared with July this year.

▼ $3.70, Wave 14

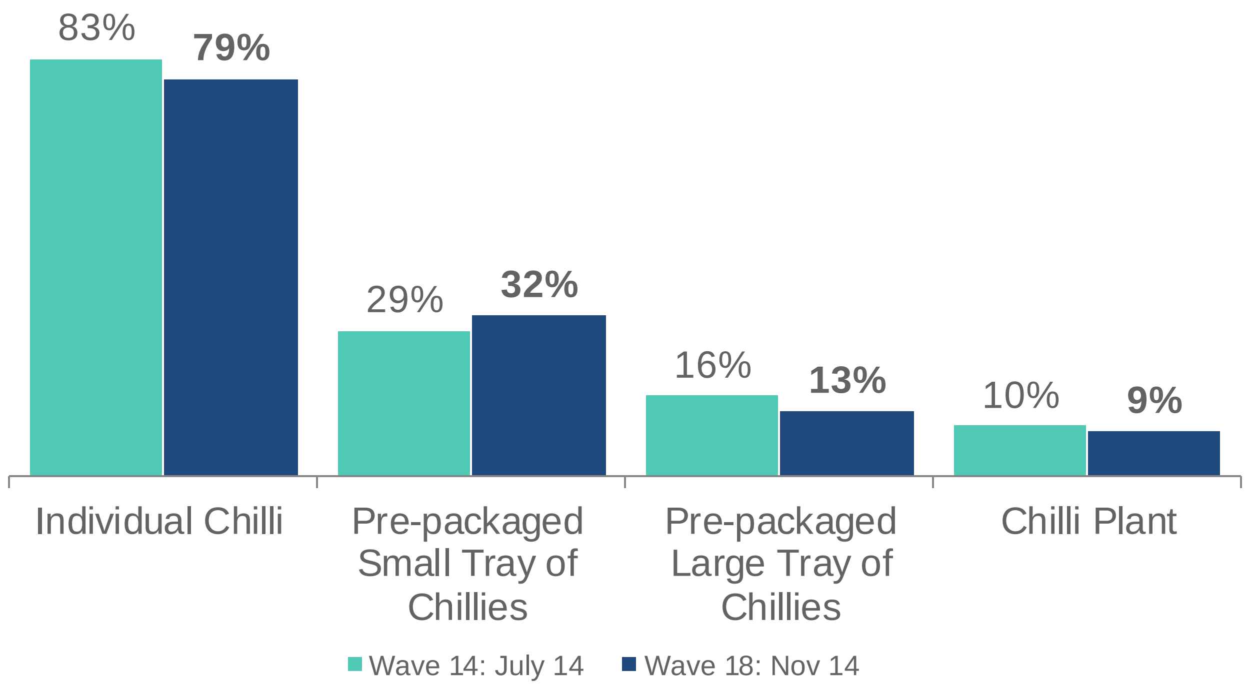
Value for money

Consumers' perceived value for money was relatively fair **(6.3/10)**, trending slightly higher than last wave.

▼ 6.1/10, Wave 14

Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? *0-10 scale*
Sample Wave 14, N=261

Consumers typically purchase 5 chillies per shop. Individual chillies are the most common format purchased.

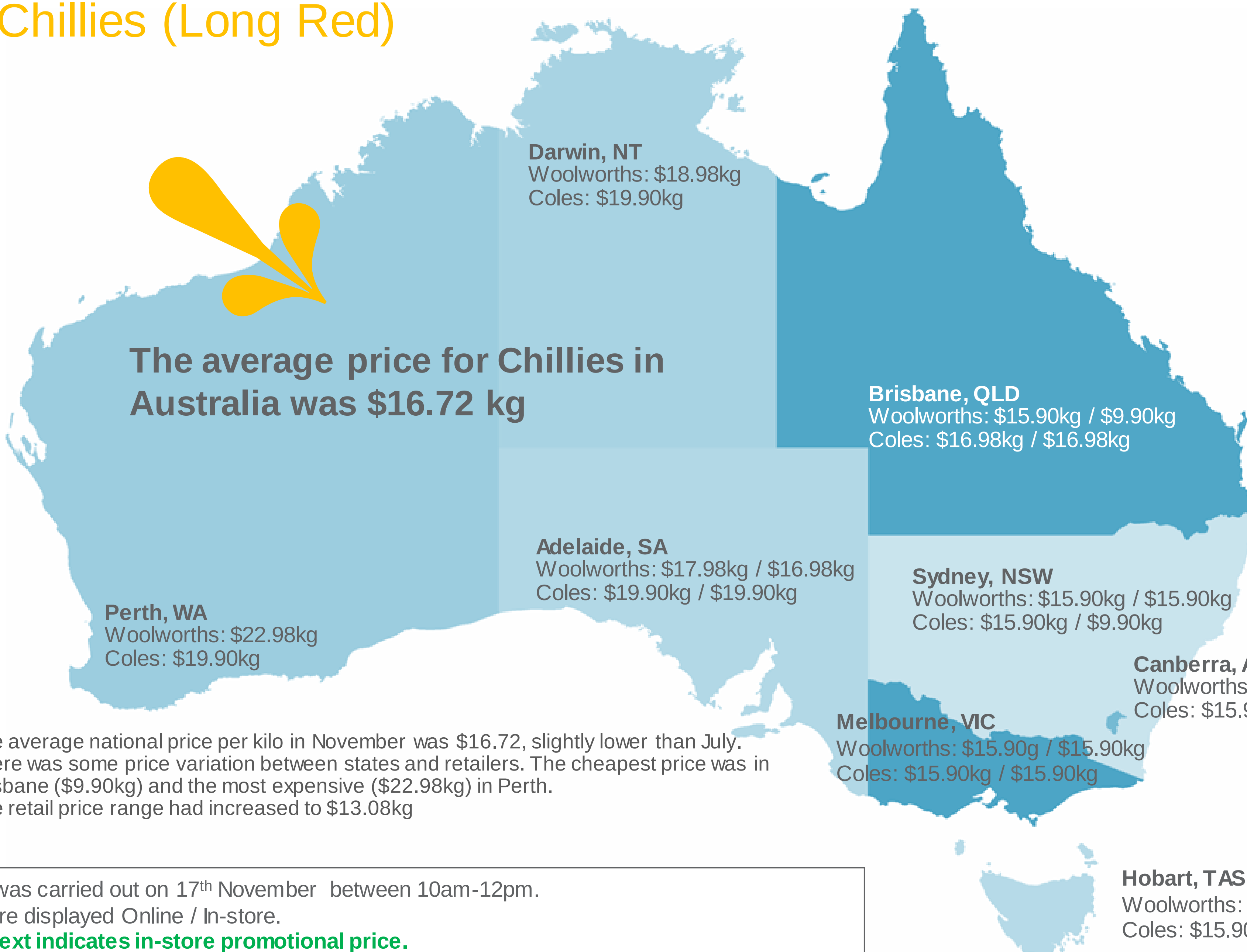


Average Amount Purchased	Individual	Pre-packaged Small Tray	Pre-packaged Small Tray	Chilli Plant
Wave 14: July 14	5.8	1.8	1.8	2.1
Wave 18: Nov 14	5.4	1.5	2.0	1.7

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

Online and In-store Commodity Prices

Chillies (Long Red)



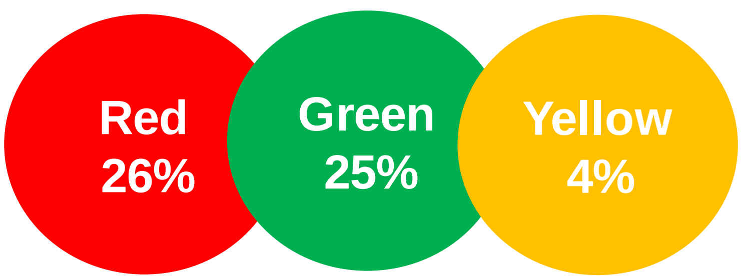
- The average national price per kilo in November was $16.72, slightly lower than July.
- There was some price variation between states and retailers. The cheapest price was in Brisbane ($9.90kg) and the most expensive ($22.98kg) in Perth.
- The retail price range had increased to $13.08kg

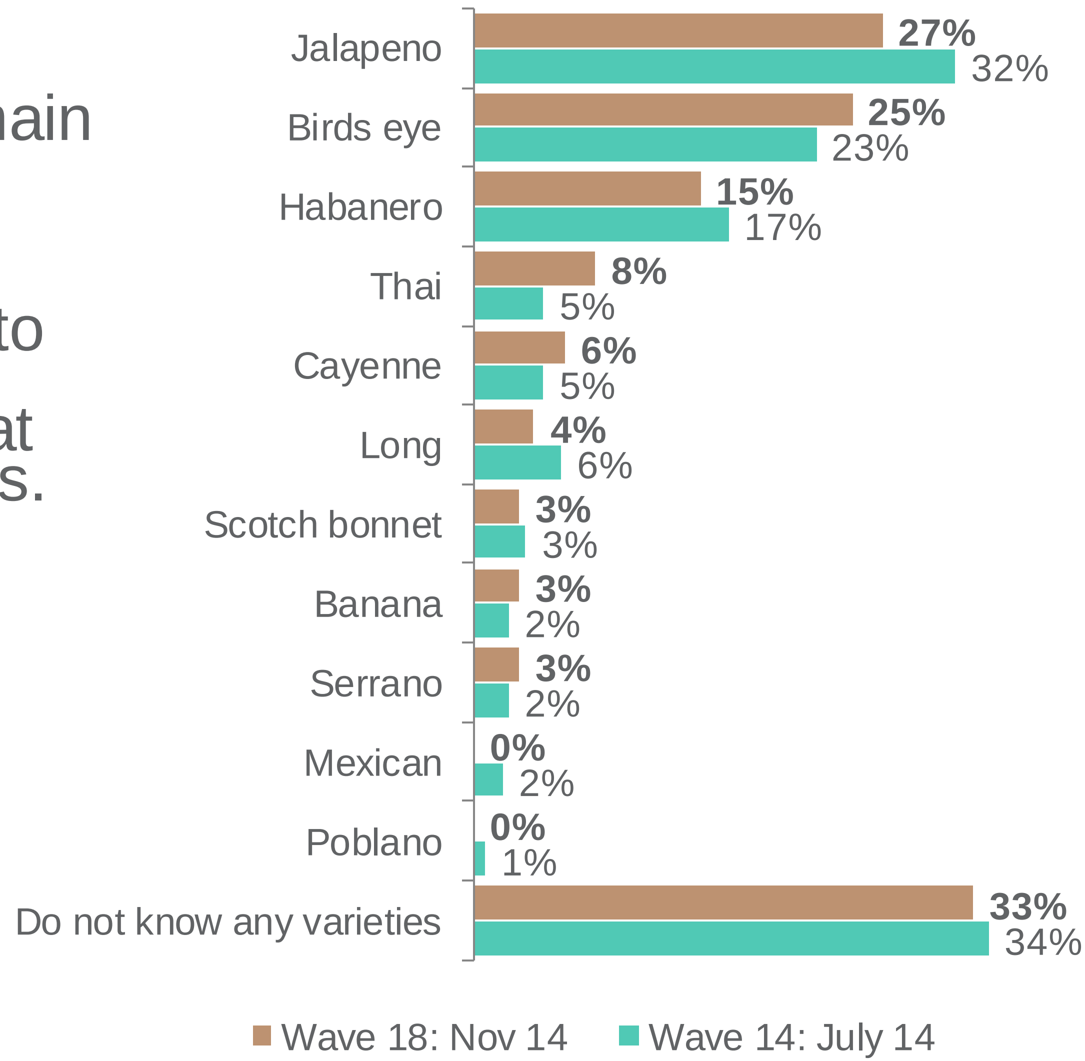
Pricing was carried out on 17th November between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates in-store promotional price.

Chilli awareness is in line with the past wave.

Jalapeno and Birds eye remain the most recalled types.

Compared with last wave, colour was less of a trigger to recall, however over half of consumers still indicated that red and green are chilli types.

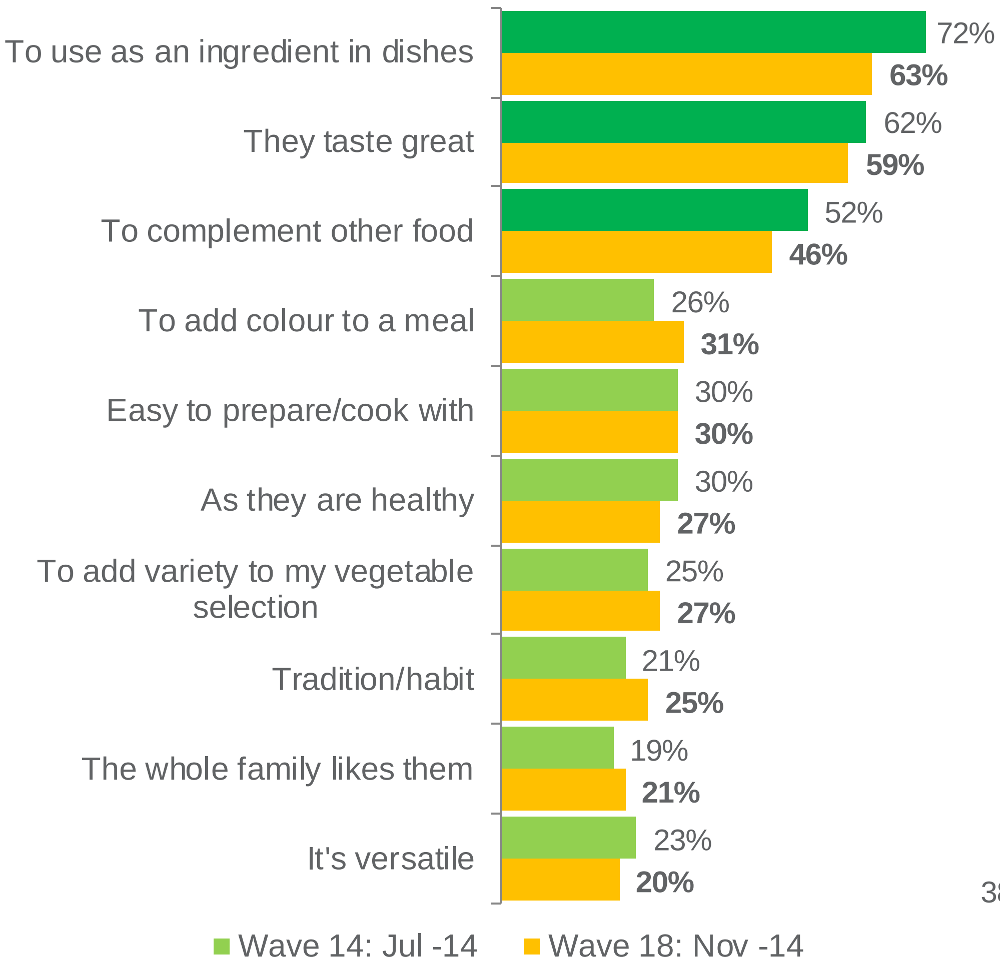




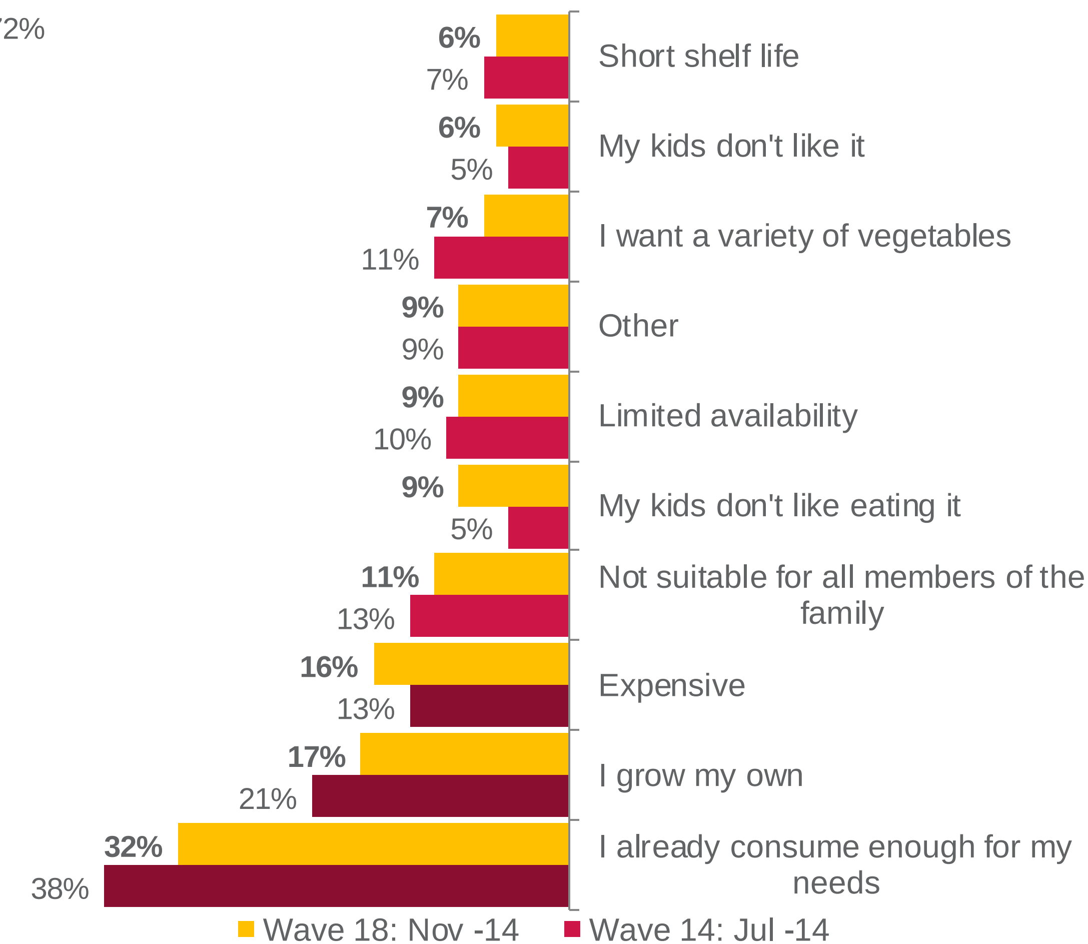
Q6a. What types/varieties of <commodity> are you aware of? (unprompted)
Sample Wave 14, N=261

Consistent with last wave, using as an ingredient and taste are the key triggers to purchase. Consuming enough for their needs was the main barrier to purchase. Expense has increased since last wave.

Triggers



Barriers



Sample Wave 14, N=261

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

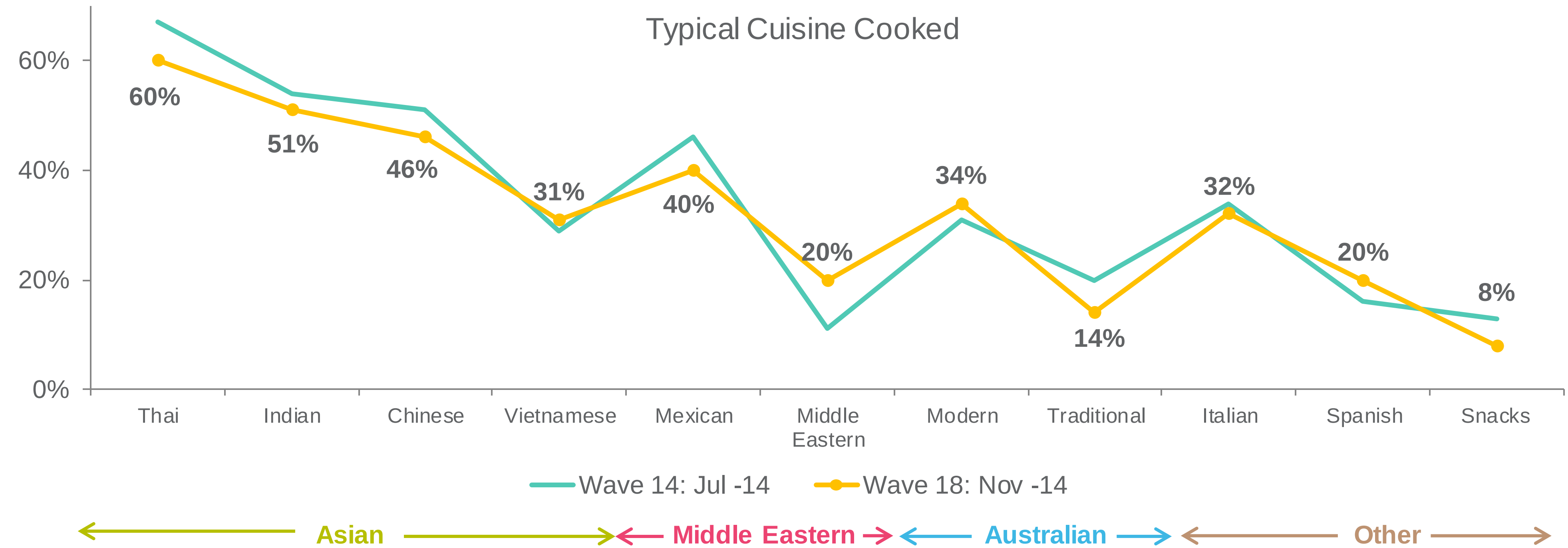
Q8. Which reason best describes why you don't buy <commodity> more often?

Cuisine has seen variability between waves, with consumers more likely to cook Middle Eastern, but less likely to cook Asian.

Although down, dinner remains the main consumption occasion.

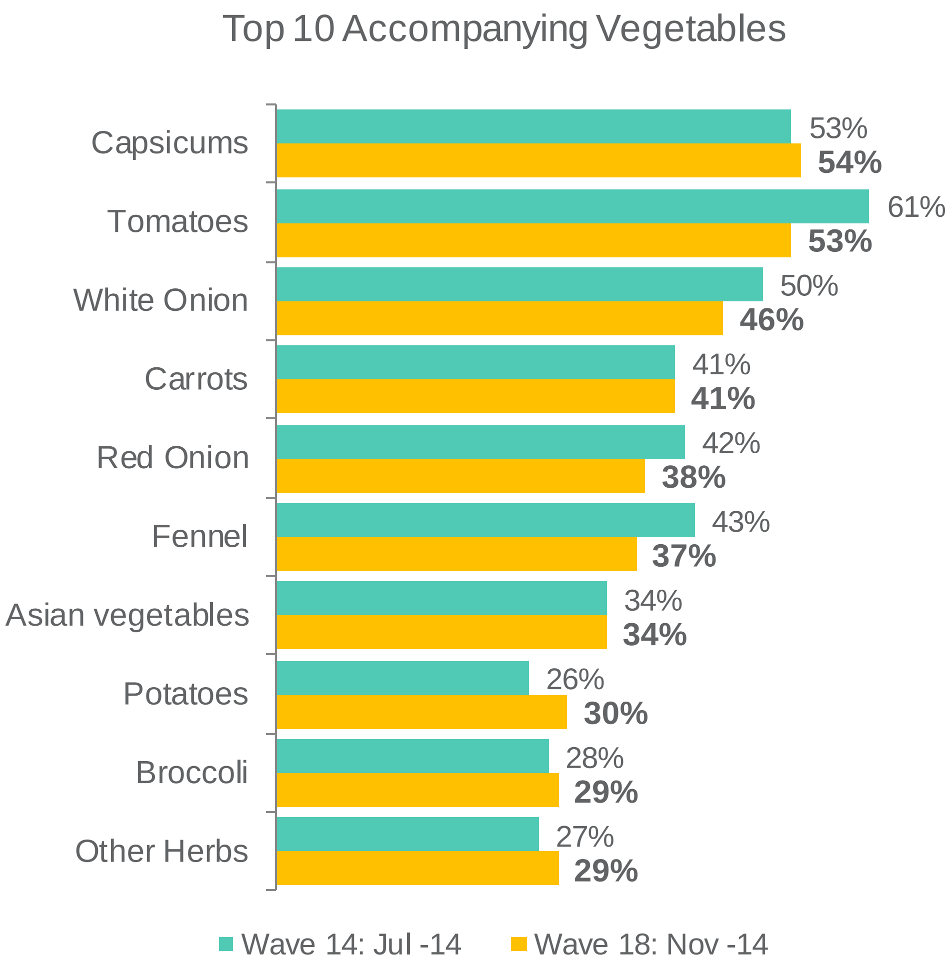
Top Consumption Occasions

	Wave 18	Wave 14
Weekday Dinner	**47%**	57%
Every-day	**42%**	36%
Weekend Dinner	**38%**	51%
Quick Meals	**32%**	27%
Family meals	**31%**	34%



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

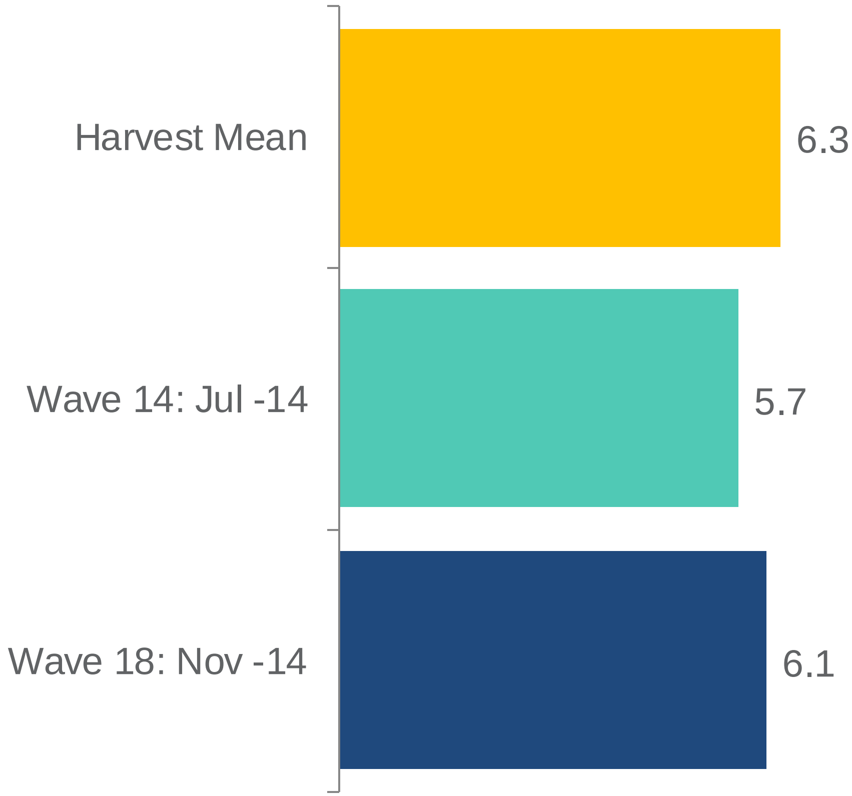
Stir-frying continues to be the main cooking style. Chillies are generally served with capsicums and tomatoes.



Top 10 Cooking Styles		
	Wave 14	Wave 18
Stir frying	72%	70%
Stewing	28%	32%
Sautéing	34%	32%
Raw	29%	31%
Soup	32%	26%
Shallow Frying	23%	24%
Roasting	13%	20%
Mince	26%	20%
Grilling	11%	19%
Blend	19%	18%

Sample Wave 14, N=261
Q9. How do you typically cook <commodity> ?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?

Whilst importance is still below the Harvest mean for all commodities tracked, this month sees an increase in importance of provenance for chillies.



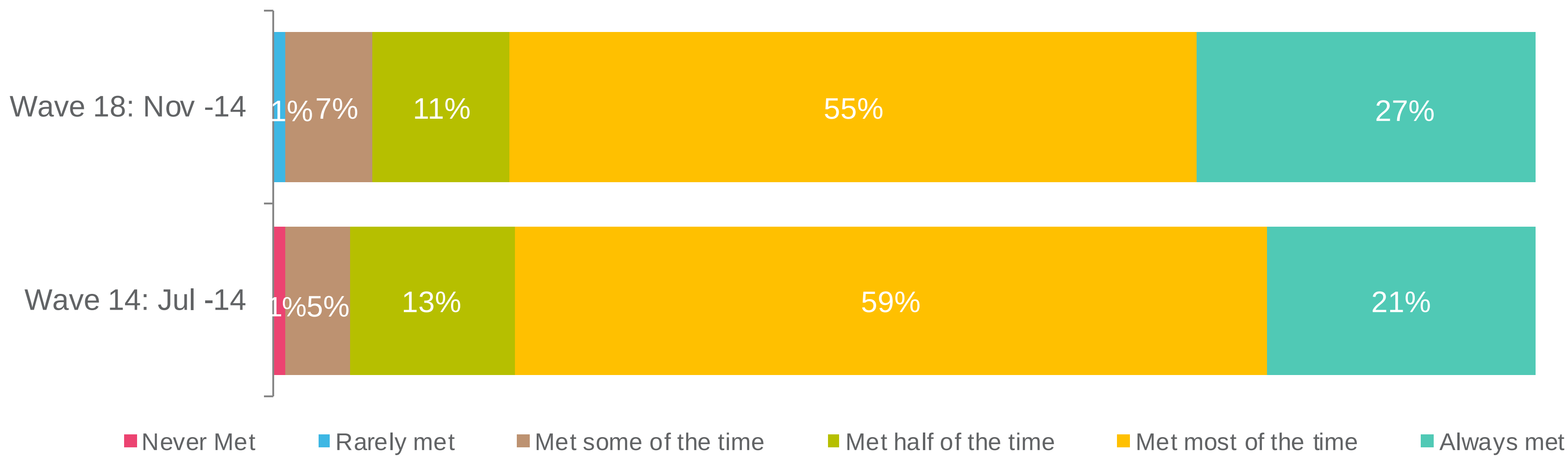
Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 14 ,N=261

Expected to stay fresh for **11.7** days

▲ 12.2 days, Wave 14

Consumers expect chillies to remain fresh for over 11 days. Whilst this has slightly decreased since the last wave, expectations of freshness are more likely to be met.

Expectations Met



Sample Wave 14 ,N=261
Q12. How long do you expect <commodity> to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy <commodity> ?

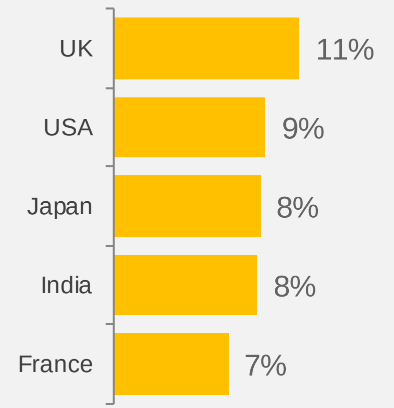
Trends: Chillies

Chilli Global Launches

September – November 2014

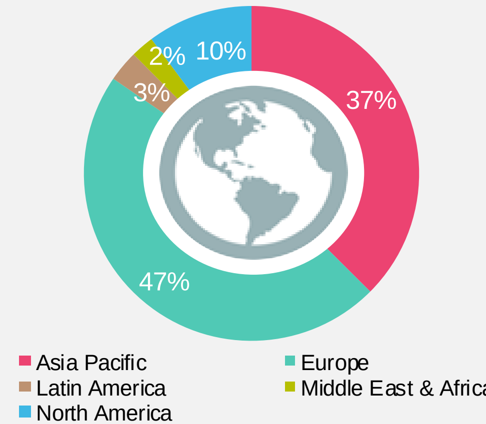
There were 1257 new products launched in the last 3 months that used contained chilli as an ingredient. The majority of these launches were in Europe and Asia Pacific regions. The top category products it launched in were meals and sauces & seasonings.

Country

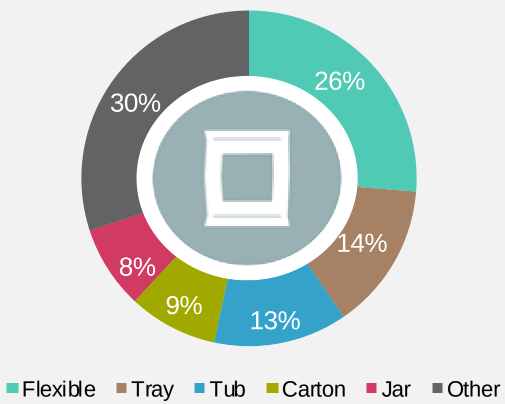


1257 Global NPDs

Region



Top Pack Formats



Categories

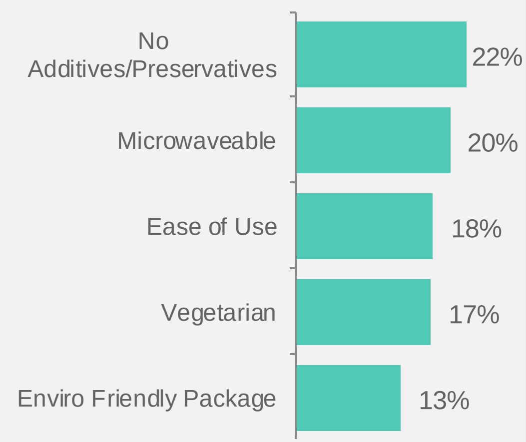
Meals 31%

Sauces & Seasoning 30%

Snacks 14%

Processed Products 12%

Top Claims



Chilli Product Launches:
Last 3 Months (September – November 2014)
Summary

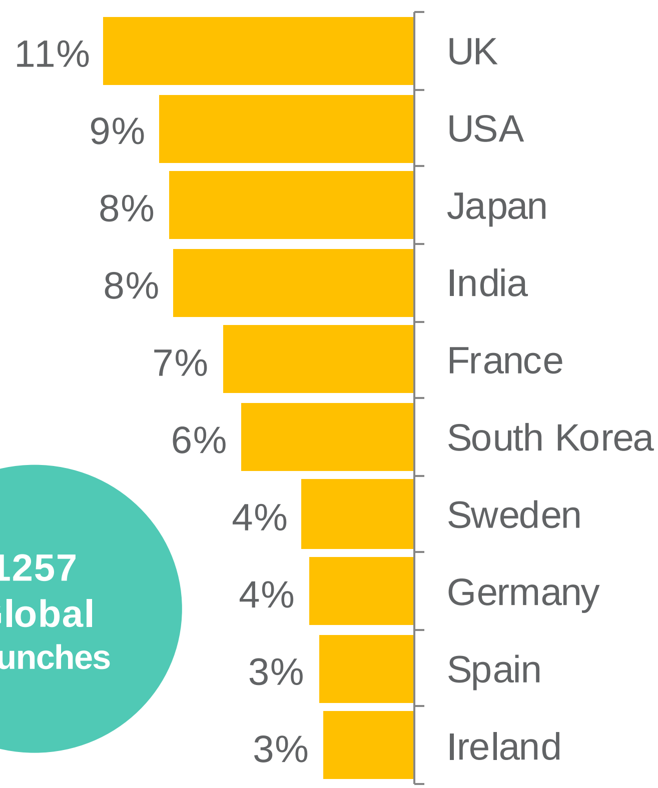
- A total of 1257 products that contained chilli as an ingredient have been launched globally in the last 3 months.
- There were 30 chilli products that are launched in Australia, double that of last trends analysis.
- The two main regions for launches are Europe (47%) and Asia Pacific (37%), consistent with the last trends analysis.
- Flexible packaging (26%) and trays (14%) are the main formats used for launches over the past three months.
- Top categories for launches are meals (31%) and sauces and seasoning (30%).
- The key claims used are no additives/preservatives (22%) and microwavable (20%).
- The most innovative product is Tohato Bokun Habanero Habamori Spicy Snack in Japan (see upcoming slides for more details).

Source: Mintel (2014)

The UK and USA have the greatest number of launches over the past three months.

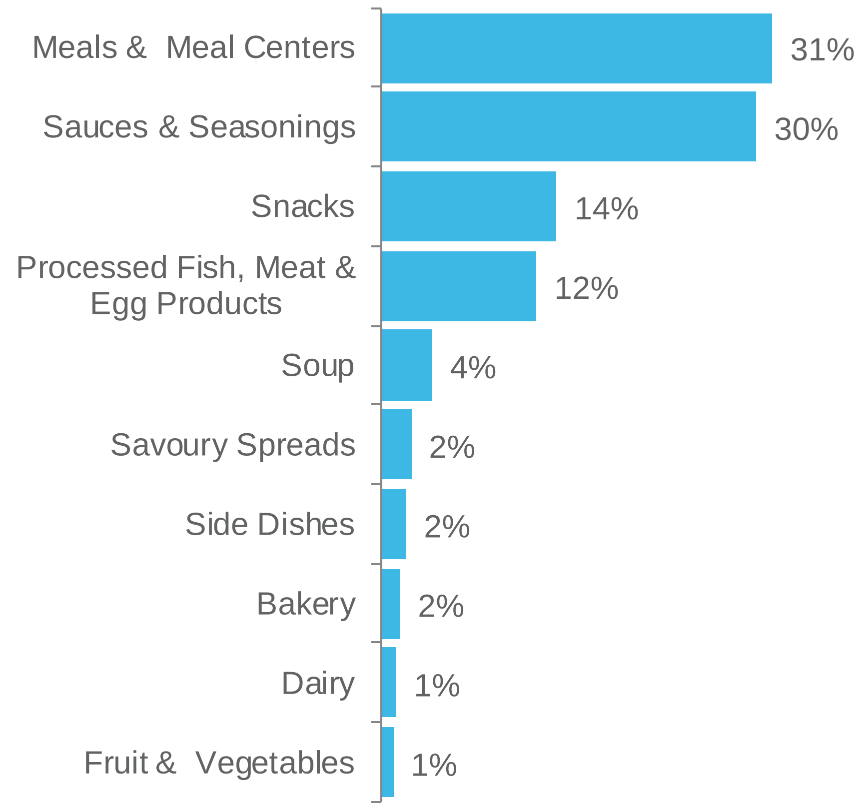
The majority of products are launched as meals or sauces and seasoning.

Top Launch Countries



1257 Global Launches

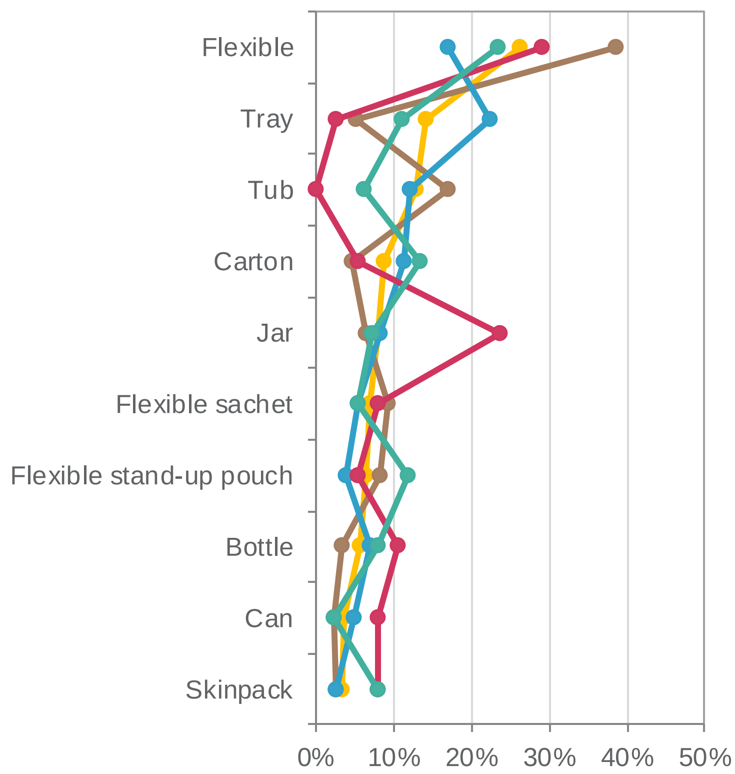
Top Launch Categories



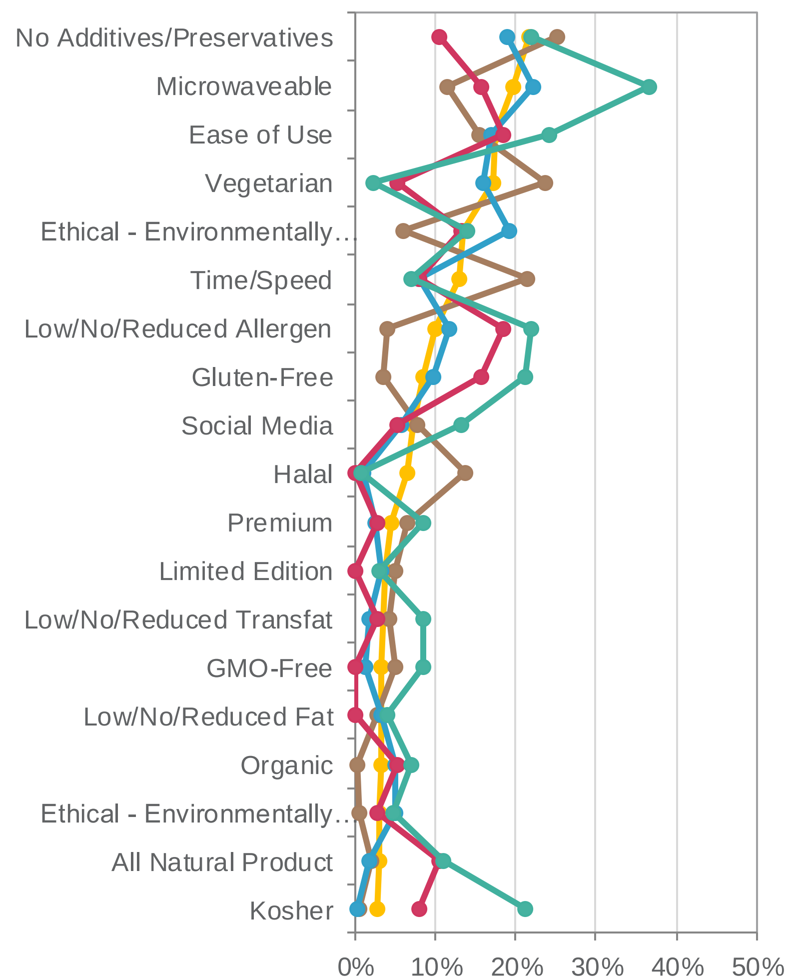
Health and convenience are key claims used on products containing chilli. Microwavable and ease of use were highly utilised in North America.

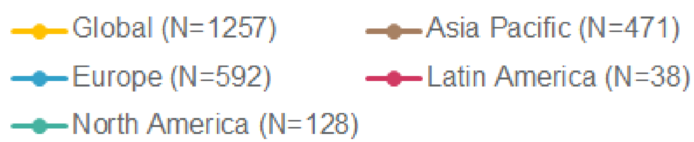
Flexible formats are the main type of packaging used.

Product Packaging



Product Claims





Only shown regions > 30 products launched

Innovative Chilli Launches:

L3M (September – November 2014)

Tohato Bokun Habanero Habamori Spicy Snack (Japan)

Tohato Bokun Habanero Habamori Spicy Snack is reformulated and repackaged. The spicy powder sachet now contains large pieces of red chili to make the product 10x more spicy. It is made with GMO-free potatoes and retails in a 39g pack. Launched on September 22, 2014, open-priced.

Claims:
GMO-Free

Marks & Spencer Taste Mexico Hot & Smoky Dip Selection (UK)

Marks & Spencer Taste Mexico Hot & Smoky Dip Selection comprises the following dip varieties: sweet ancho chilli and red pepper salsa, smoky chipotle mayonnaise, and zesty tomatillo and jalapeño salsa. This medium spicy vegetarian redy to eat product retails in a 150g pack.

Claims:
Ease of Use, Vegetarian

Trumpf Yeah Peanut Butter & Spicy Peanut Chocolates (Germany)

Trumpf Yeah Peanut Butter & Spicy Peanut Chocolates are now available. The product includes the following varieties: Peanut Butter Crunchy; Peanut Butter Biscuit; and Peanut Butter with Spicy Peanut. This product retails in a 150g pack featuring the Facebook logo.

Claims:
Social Media

Good GN Kang Hodong's Spicy Rich Noodles (South Korea)

Good GN Kang Hodong's Spicy Rich Noodles feature a hot spicy soup seasoning and a crab meat garnish. The product retails in a pack containing four 120g packets.

Claims:
N/A

Source: Mintel (2014)

Innovative Chilli Launches:
L3M (September – November 2014)

Iglo Roerbak Sensatie Stuffed Sicilian Pasta (Netherlands)

Iglo Roerbak Sensatie Gevulde Pasta Siciliana (Stuffed Sicilian Pasta) is a tasteful fresh pasta, stuffed with tomato, cheese and eggplant in a delicious tomato sauce based on a Sicilian recipe. This product is free from artificial flavourings and flavor enhancers, and retails in a 450g pack.

Claims:
No Additives/Preservatives, Ethical - Environmentally Friendly Product

Chungjungone Classic Sunchang Spicy Cocktail Sauce (South Korea)

Chungjungone Classic Sunchang Spicy Cocktail Sauce contains added plum from Gwangyang, aromatic roasted sesame, fragrant garlic and a spicy red pepper paste. It is suitable to dip vegetables and retails in a 500g pack bearing the HACCP and LOHAS logos.

Claims:
Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product

Morning Heim Big Dumpling with Spicy Kimchi (South Korea)

Morning Heim Big Dumpling with Spicy Kimchi is claimed to be a nutritious snack filled with extra domestic meat and fresh vegetables in fermented and aged softer dumpling skin. This premium product retails in a 140g pack featuring the HACCP logo.

Claims:
Premium

Kurkure Chilli Chatka Snack (India)

Kurkure Chilli Chatka Snack has been repackaged in a newly designed 100g pack featuring a chance to win a free air tickets every hour. This product is suitable for vegetarians.

Claims:
Social Media, Vegetarian

Source: Mintel (2014)

Innovative Chilli Launches:
L3M (September – November 2014)

The Republic of Tea Be Active Teas Get Burning Hot Tea (USA)

The Republic of Tea Be Active Teas Get Burning Hot Cinnamon Ginger Tea has been relaunched under a new brand name. This herb tea for metabolism contains organic green rooibos, cinnamon, ginger, chili, holy basil, and cordyceps black pepper.

Claims:
All Natural Product, Refill, Gluten-Free, Caffeine Free, Ethical - Environmentally Friendly Package, Other (Functional), Kosher, Ethical - Environmentally Friendly Product, Ethical - Human, Organic, Low/No/Reduced Allergen

Wunderbar Gourmet Salmon in Asian Spices (Indonesia)

Wunderbar Gourmet Salmon in Asian Spice has been repackaged. It comprises imported salmon from the deep cold waters of the Atlantic ocean with a combination of healthy herbs and spies originating from the Indonesian archipelago. It is said to be aromatic with a mildly hot chilli taste.

Claims:
No Additives/Preservatives

Findus World Selection Chicken Mexicano Mole (Sweden)

Findus World Selection Chicken Mexicano Mole comprises chicken inner fillets in a Mexican sauce with cocoa and chili served with mixed beans and rice. The microwaveable product retails in a 380g recycled pack.

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

Heks'nkaas Cream Cheese Dip with Sweet Chilli & Coriander (Netherlands)

Heks'nkaas Zoete Chili Koriander (Cream Cheese Dip with Sweet Chilli & Coriander) is made with cream cheese, fresh herbs, sweetener and sugar. The limited edition product retails in a 200g pack.

Claims:
Limited Edition

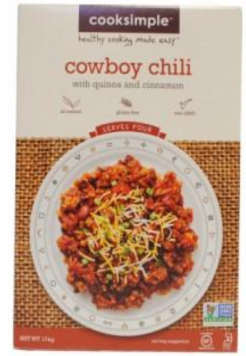
Source: Mintel (2014)

Australian Chilli Launches:
L3M (September – November 2014)

Flavour Fusions Coconut Curry Dinner Pack

Remano Hot & Spicy Cous Cous

Cooksimple Cowboy Chili with Quinoa and Cinnamon



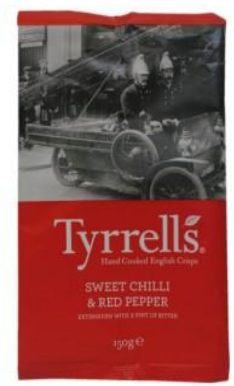
McCormick Grill Mates Blazin' Pepper Steak Seasoning

Sue Shepherd Green Curry Meal Kit

Tonight Chilli Con Carne Recipe Base with Garlic, Chilli & Paprika

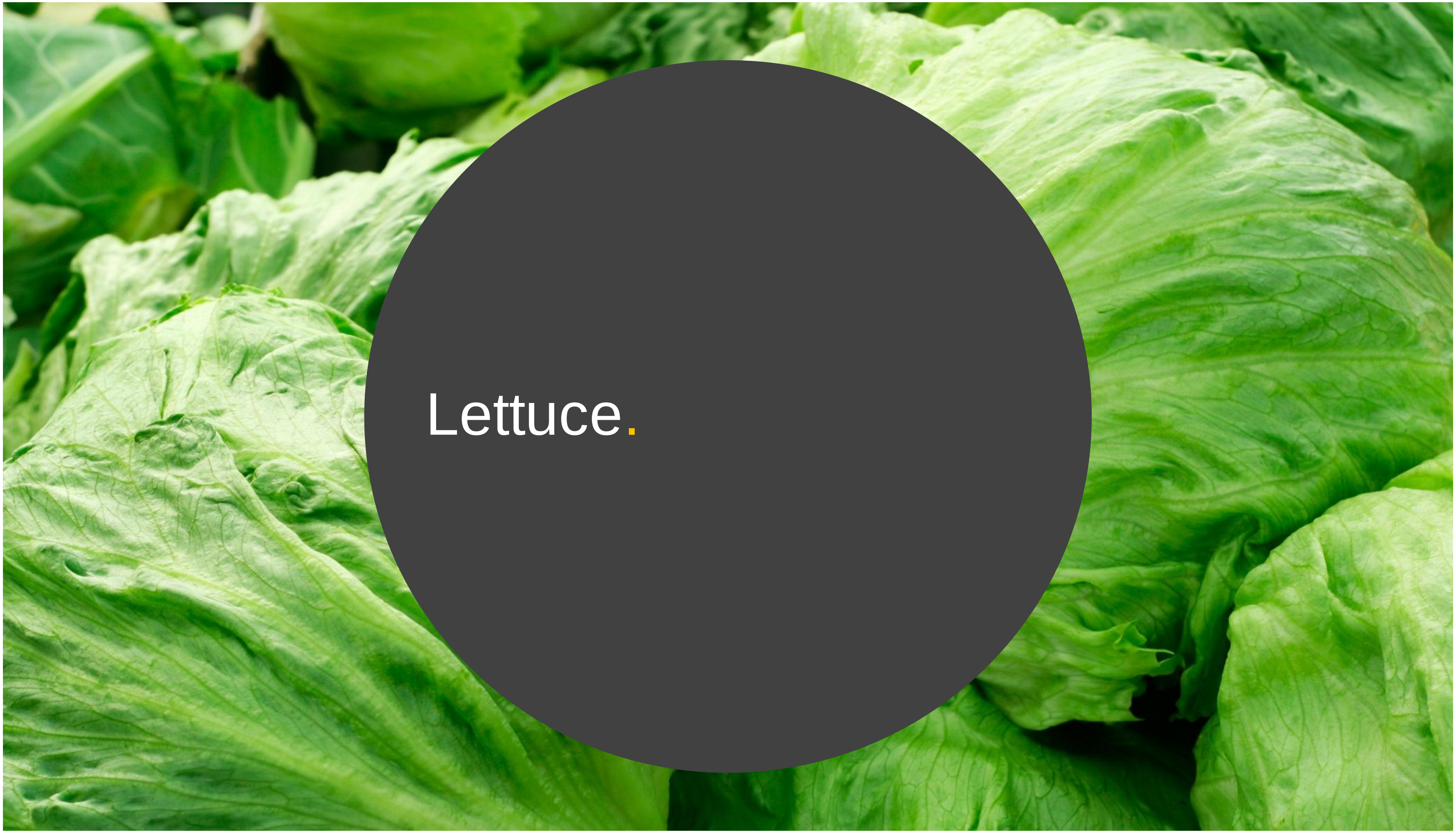
Old El Paso Stand 'N Stuff Soft Taco Kit

Tyrrells Sweet Chilli & Red Pepper Hand Cooked English Crisps



Source: Mintel (2014)

Lettuce.



Coming into warmer months has seen an upward trend of purchase and consumption of lettuce.

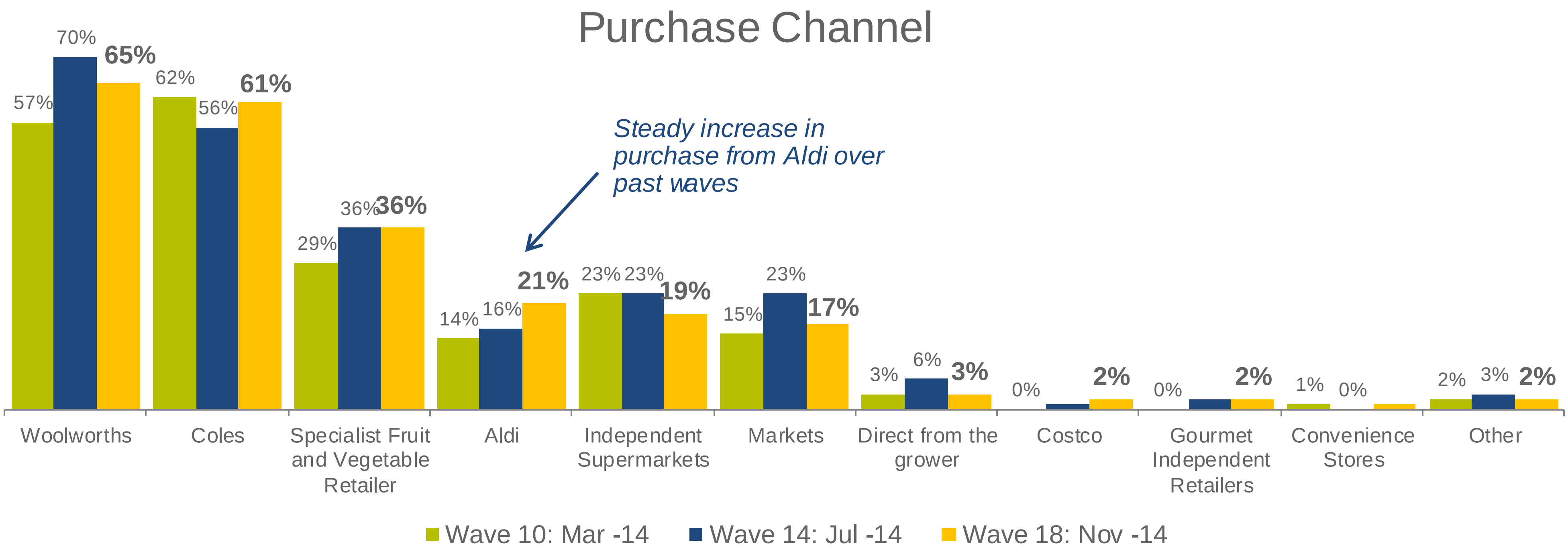
Mainstream retailers continue to dominate purchase channels.

Average Purchase **5.6** times per month

▼ 4.6 times, Wave 10
▼ 4.7 times, Wave 14

Average Consumption **15.7** times per month

▼ 14.2 times, Wave 10
▼ 10.0 times, Wave 14



Q1. On average, how often do you purchase <commodity> ?
Q2. On average, how often do you consume <commodity>?
Q5. From which of the following channels do you typically purchase <commodity> ?
Sample Wave 6 N=370, Wave 10 N=326 Wave 14 N=315

Horticulture Innovation Australia

colmar brunton.

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

Average Spend and Price Sensitivity

Average weight of purchase

The typical consumer purchased **800g** of lettuce, which is consistent with past months.

▼ 700g, Wave 10
▬ 800g, Wave 14

Recalled last spend

Recalled last spend on the purchase of lettuce was **$3.70.** Over the past months there has been a trend towards increased spend.

▼ $3.50, Wave 10
▼ $3.60, Wave 14

Value for money

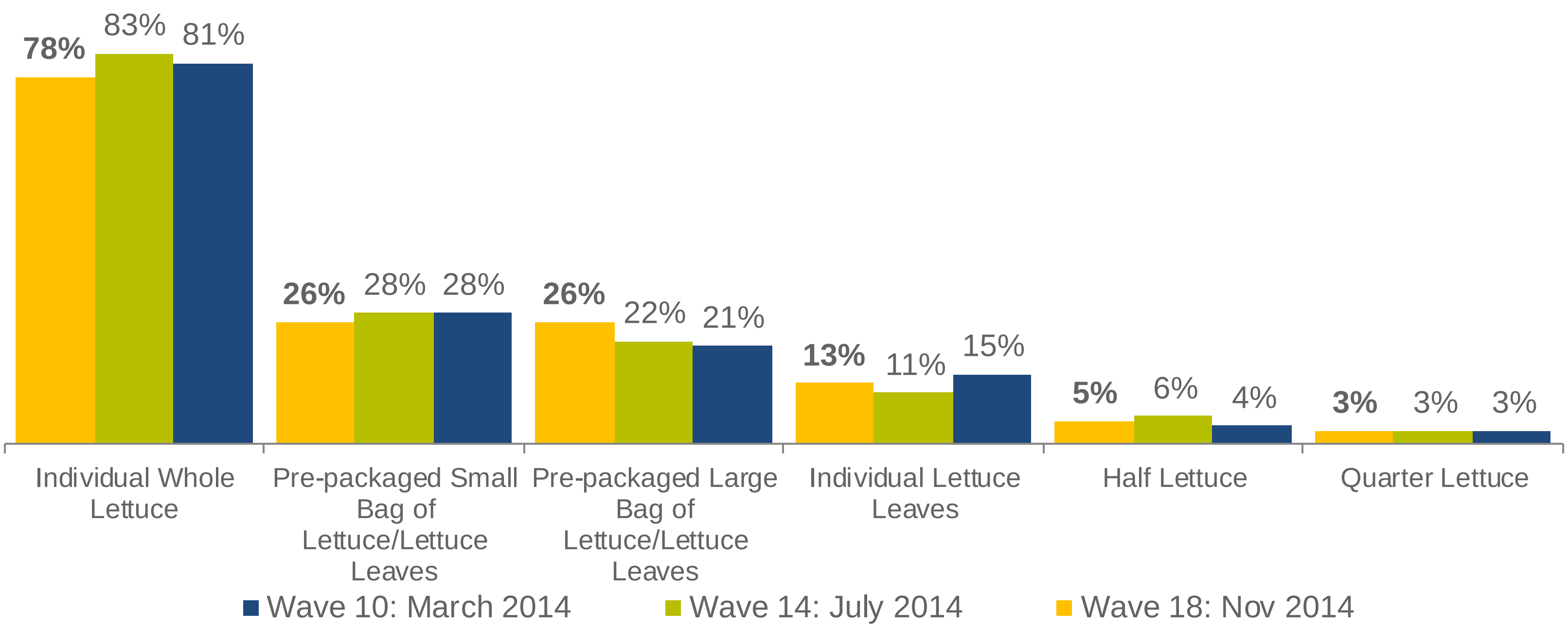
Consumers' perceived value for money was only fair **(6.1/10)**, up from previous waves.

▼ 6.0/10, Wave 10
▼ 5.7/10, Wave 14

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

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

Individual lettuce heads remain the most common format purchased. Packed lettuce bags are also popular.

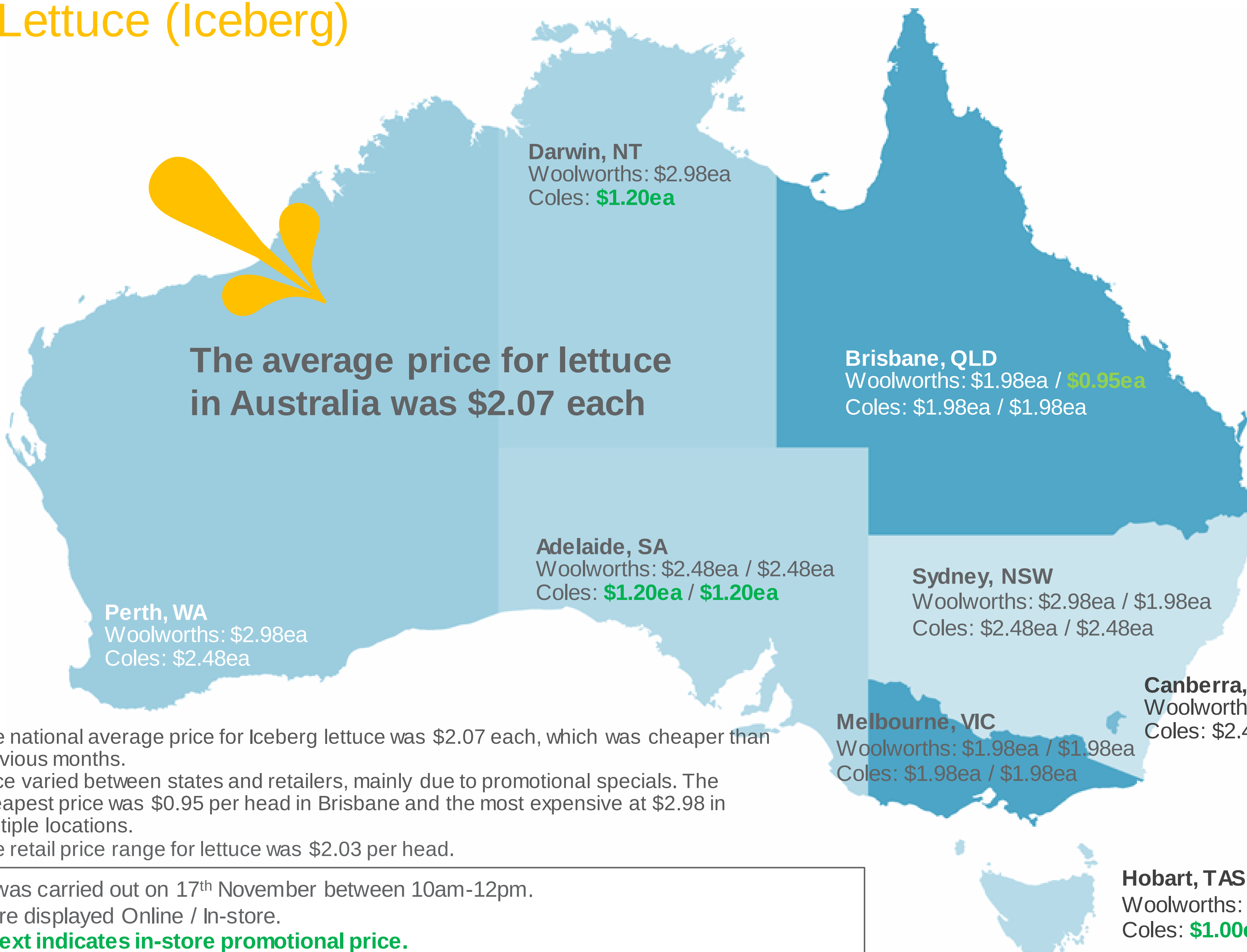


Average amount purchased per shop	Individual Whole Lettuce	Pre-packaged small bag of lettuce	Pre-packaged large bag of lettuce	Individual lettuce leaves	Half lettuce	Quarter lettuce
Wave 10: Mar 14	1.2	1.5	1.5	12.4	1.7	2.3
Wave 14: July 14	1.1	1.2	1.3	12.6	1.5	1.5
Wave 18: Nov 14	1.2	1.3	1.4	10.5	1.6	2.0

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

Online and In-store Commodity Prices

Lettuce (Iceberg)

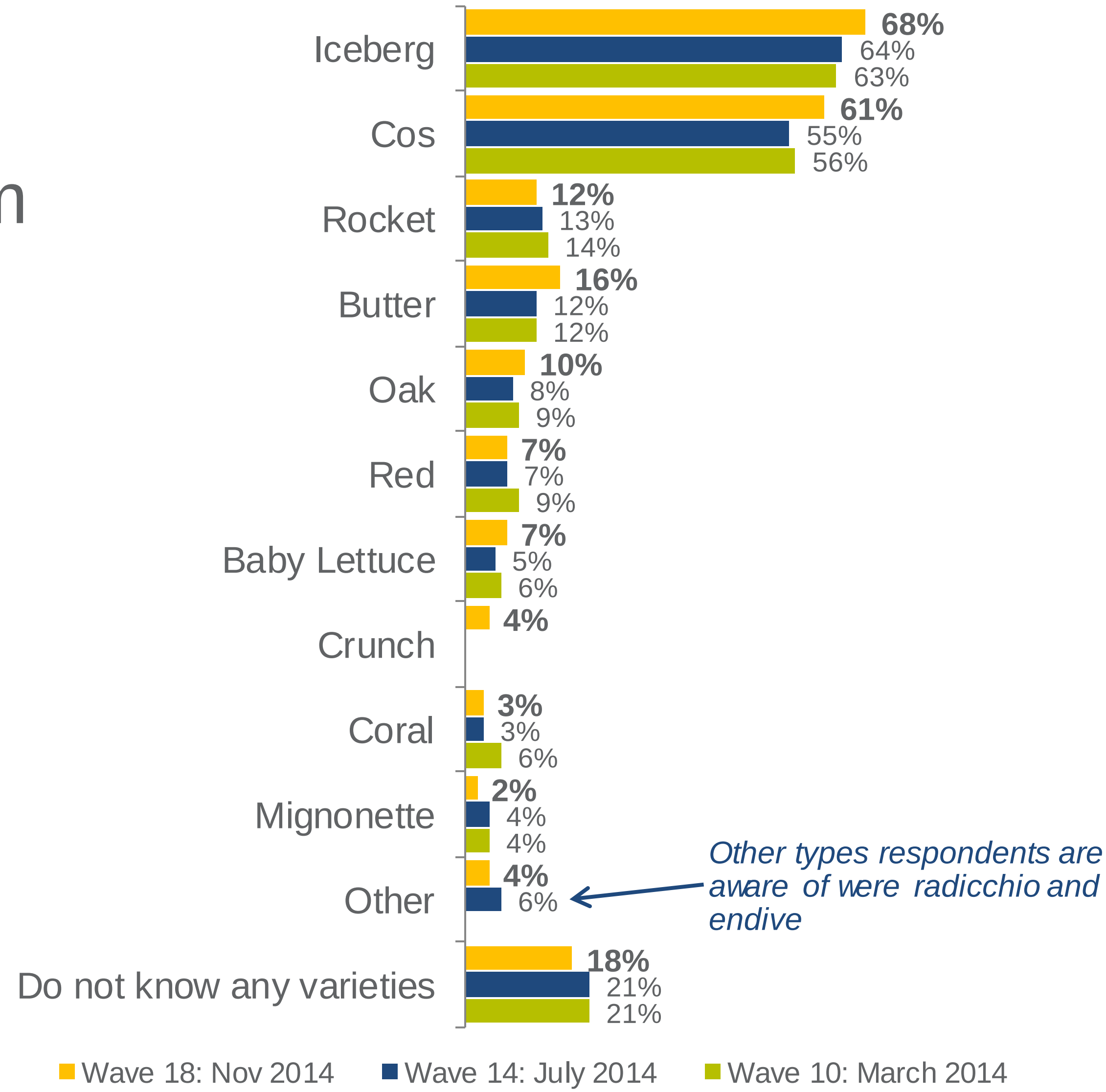


- The national average price for Iceberg lettuce was $2.07 each, which was cheaper than previous months.
- Price varied between states and retailers, mainly due to promotional specials. The cheapest price was $0.95 per head in Brisbane and the most expensive at $2.98 in multiple locations.
- The retail price range for lettuce was $2.03 per head.

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

Awareness of lettuce types has increased from the last wave.

There has been a consistent increase in iceberg, cos and butter lettuce recall.

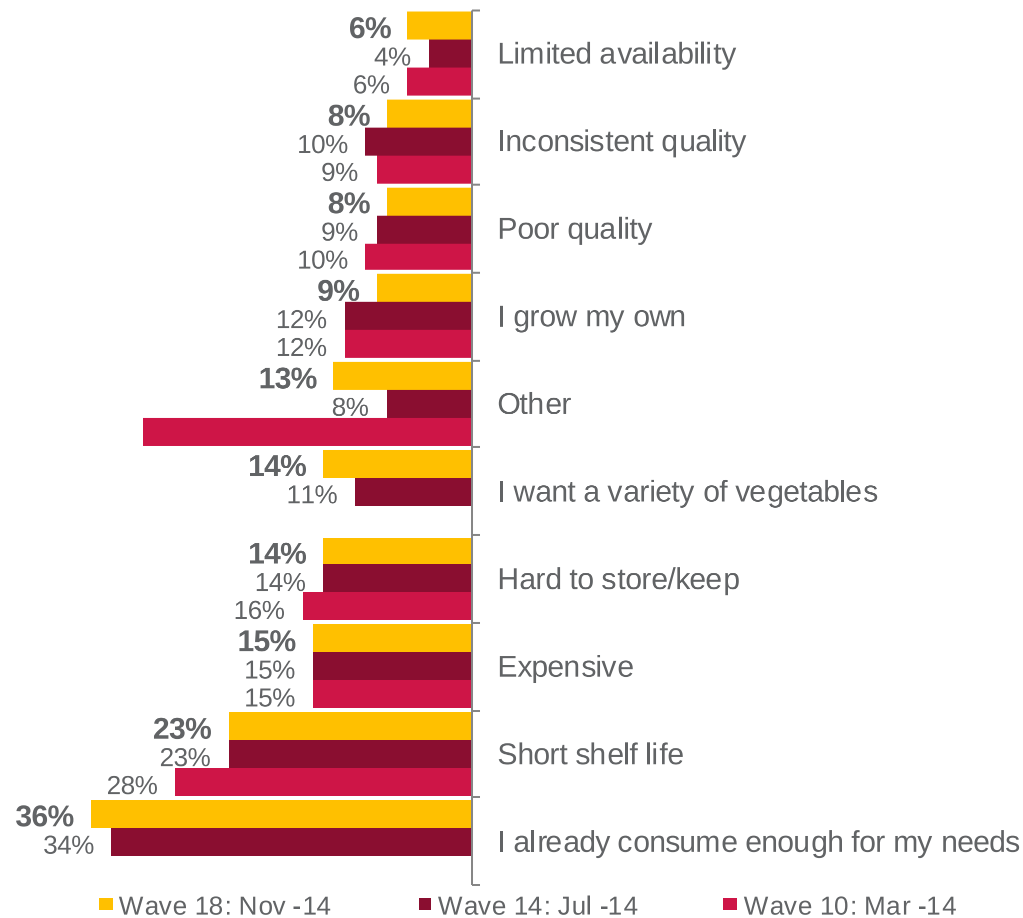


Sample Wave 6 N=370, Wave 10 N=326 Wave 14 N=315
Q6a. What types/varieties of <commodity> are you aware of? (unprompted)

The key motivation to purchasing lettuce is health, complementing other food and ease of use are also important factors. Consuming enough for needs and short shelf life are primary barriers to purchase.

Triggers

Barriers



Sample Wave 6 N=370, Wave 10 N=326 Wave 14 N=315
Q7. Which of the following reasons best describes why you purchase <commodity> ?
Q8. Which reason best describes w hy you don't buy <commodity> more often?

Horticulture Innovation Australia

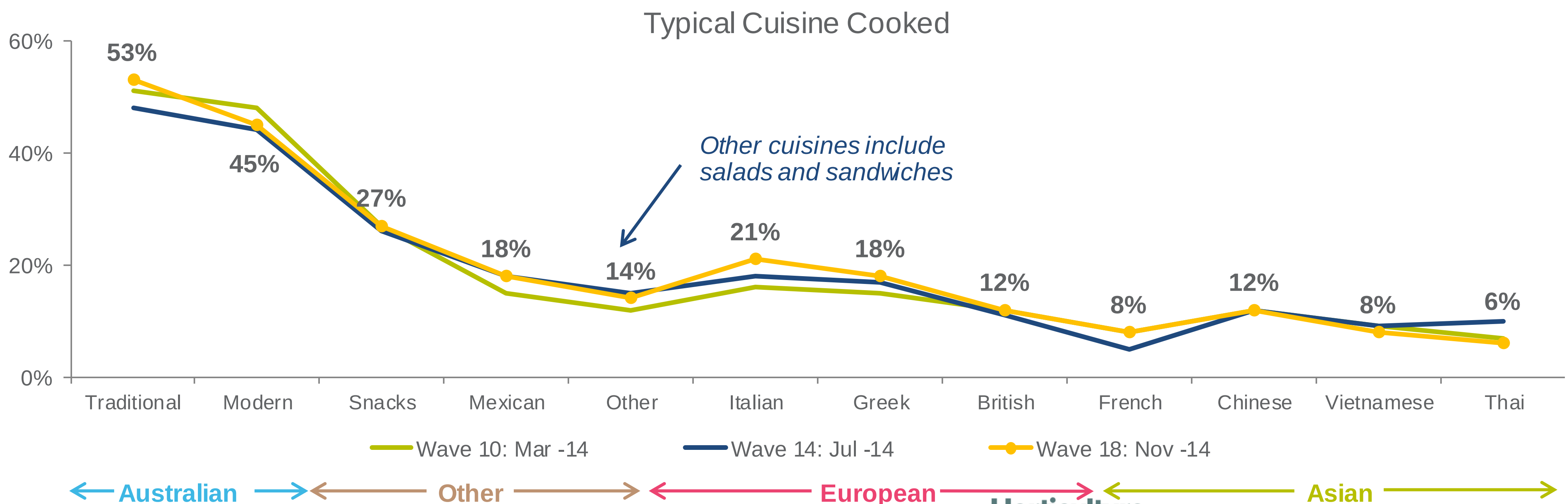
colmar brunton.

Weekday meal occasions remain popular, likely due to ease of preparation.

Cuisine is consistent across waves. There is a trend towards Italian cooking with lettuce.

Top 5 Consumption Occasions

	Wave 18	Wave 14	Wave 10
Weekday Dinner	**52%**	43%	43%
Weekday Lunch	**47%**	44%	49%
Weekend Lunch	**46%**	36%	43%
Every-day Meals	**41%**	34%	38%
Weekend Dinner	**41%**	36%	36%



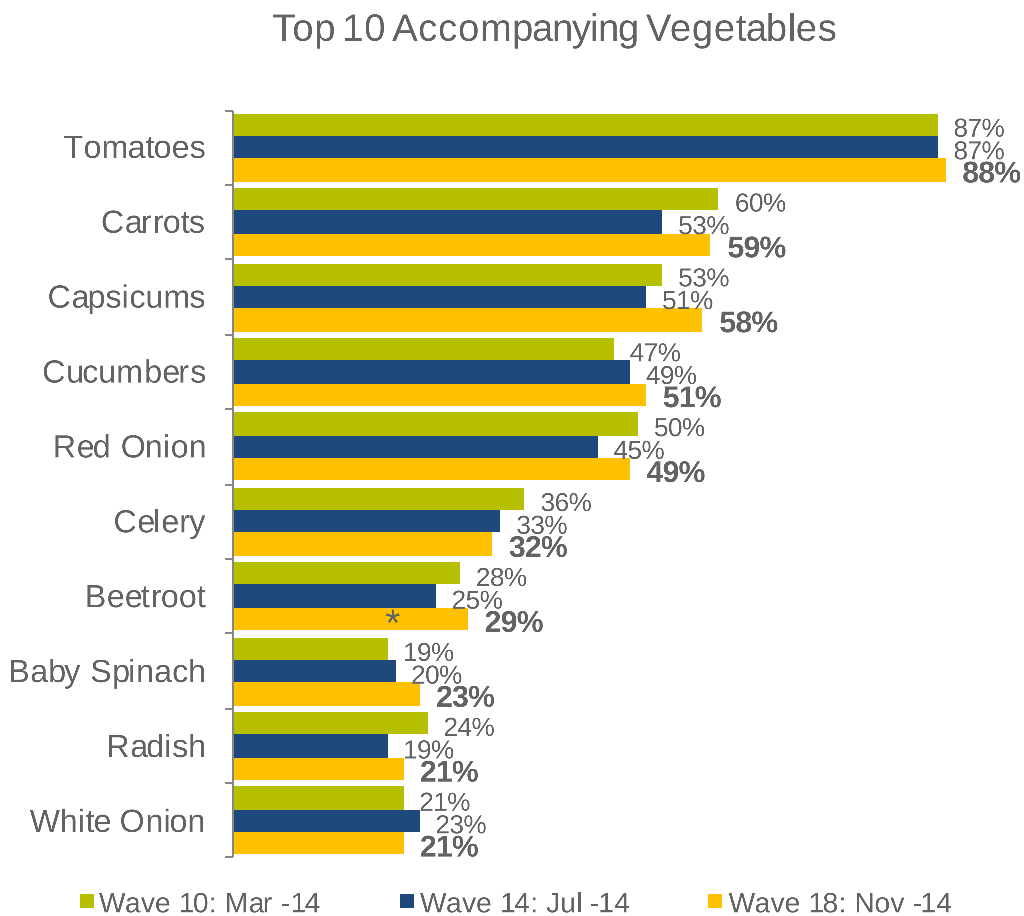
Sample Wave 6 N=370, Wave 10 N=326 Wave 14 N=315
Q10. What cuisines do you cook/consume that use <commodity> ?
Q11. Which of the following occasions do you typically consume/use <commodity> ?

Horticulture Innovation Australia

colmar brunton.

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

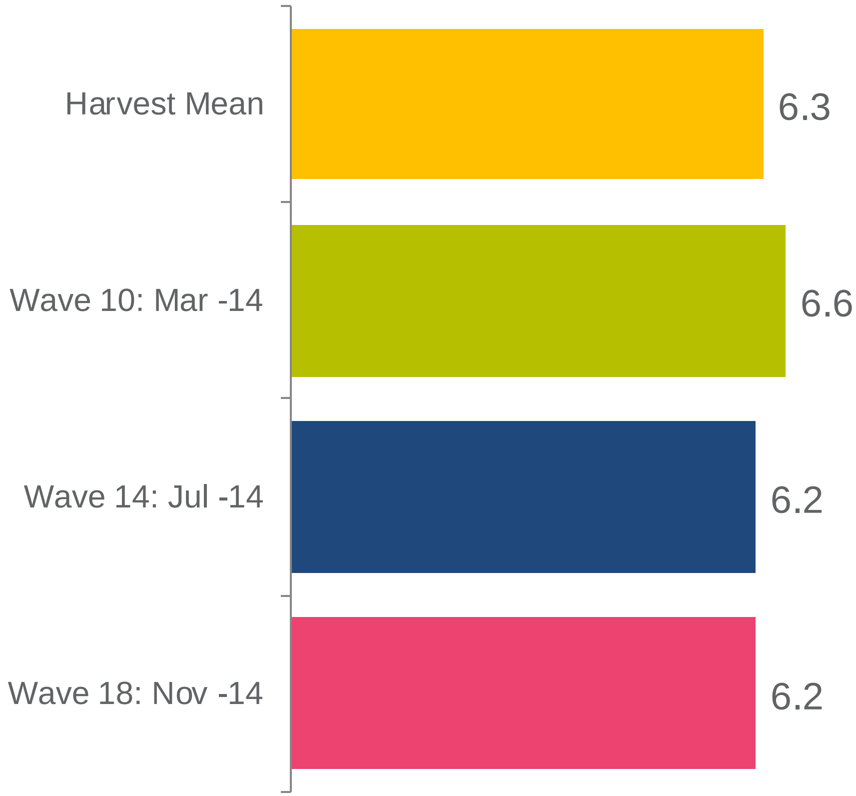
Lettuce is routinely served raw with tomatoes, with minimal variation across waves.



Top 10 Cooking Styles			
	Wave 10	Wave 14	Wave 18
Raw	72%	74%	76%
Other – not cooked	23%	20%	19%
Stir frying	3%	7%	7%
Steaming	2%	2%	4%
Soup	2%	3%	4%
Boiling	2%	3%	3%
Blanche	2%	2%	2%
Blend	1%	2%	2%
Sautéing	2%	2%	2%
Roasting	0%	0%	1%

Sample Wave 6 N=370, Wave 10 N=326 Wave 14 N=315
Q9. How do you typically cook <commodity> ?
Q10a. And when are you serving <commodity> which of the following do you also serve together with this?

Importance of provenance for lettuce is in line with July 2014 and the Harvest mean.



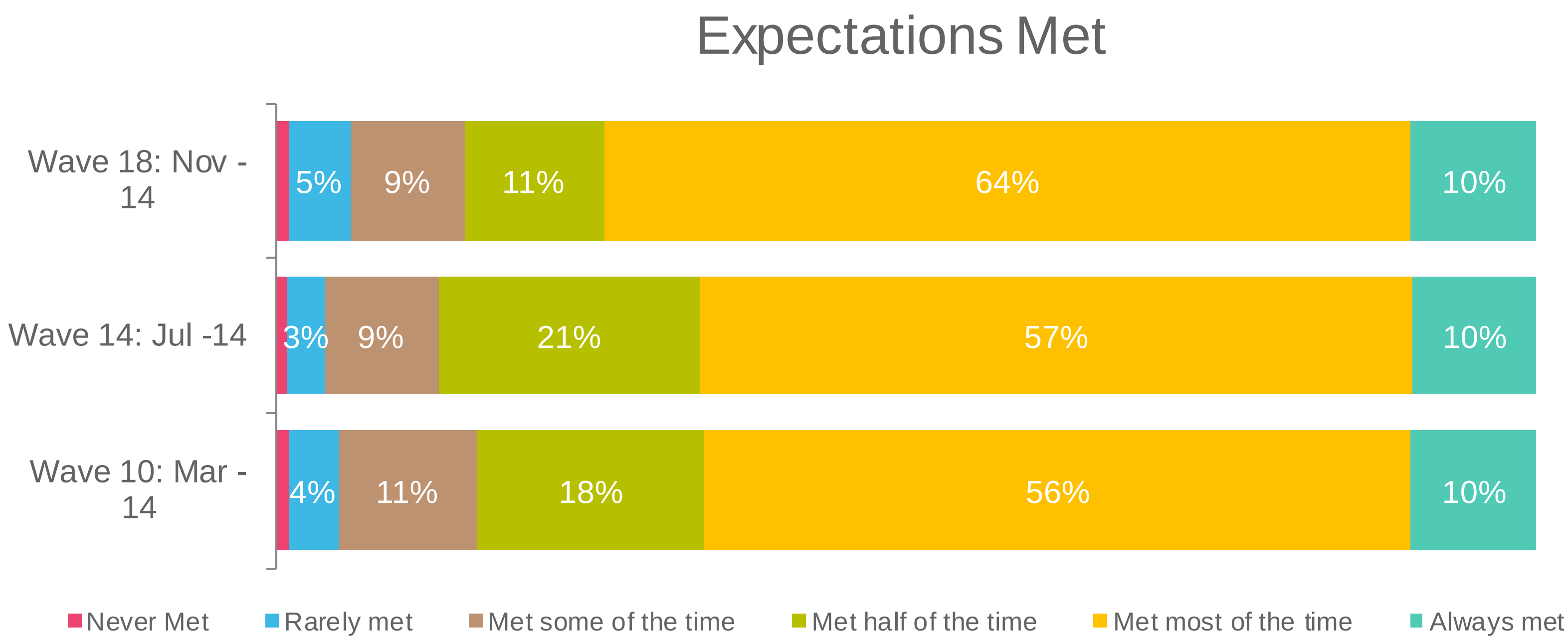
AUSTRALIAN MADE®

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

Expected to stay fresh for **7.2** days

▲ 7.3 days, Wave 10
▲ 7.5 days, Wave 14

Freshness has remained relatively stable across waves, however freshness expectations are more likely to be met most of the time.



Sample Wave 6 N=370, Wave 10 N=326 Wave 14 N=315
Q12. How long do you expect <commodity> to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy <commodity> ?

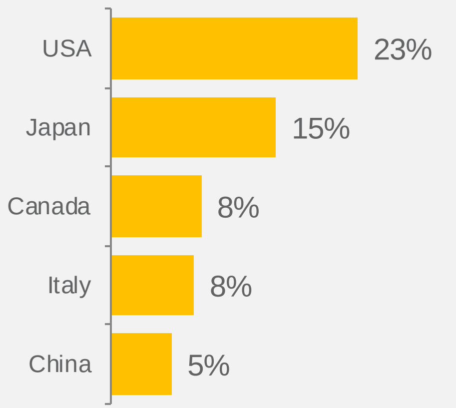
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Trends: Lettuce

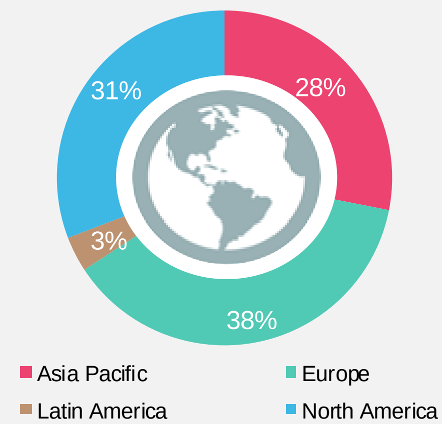
Lettuce Global NPDs
September – November 2014

There were 146 products launched globally over the last three months that contained lettuce as an ingredient. The main regions for launches were Europe, North American and Asia Pacific. Products launches were primarily meals and fruit and vegetables.

Country

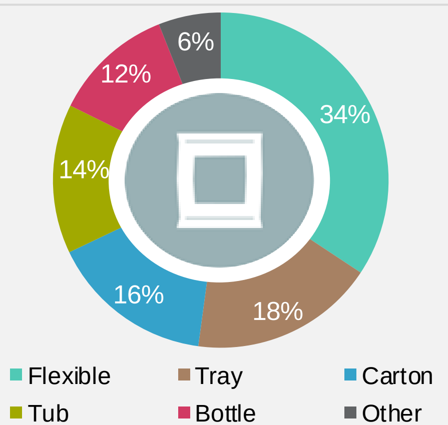


Region



146 Global NPDs

Top Pack Formats



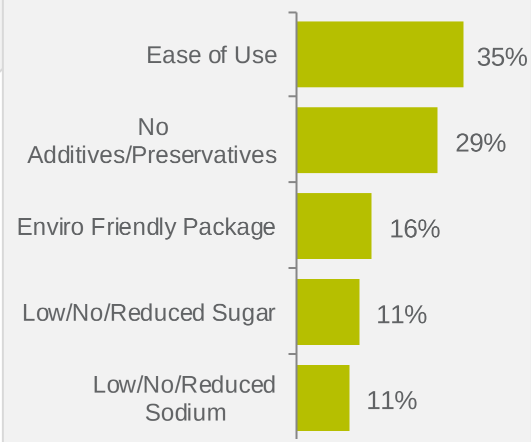
Categories

Meals 36%

Fruit & Vegetables 34%

Juice Drinks 23%

Top Claims



Lettuce Product Launches:
Last 3 Months (September – November 2014)
Summary

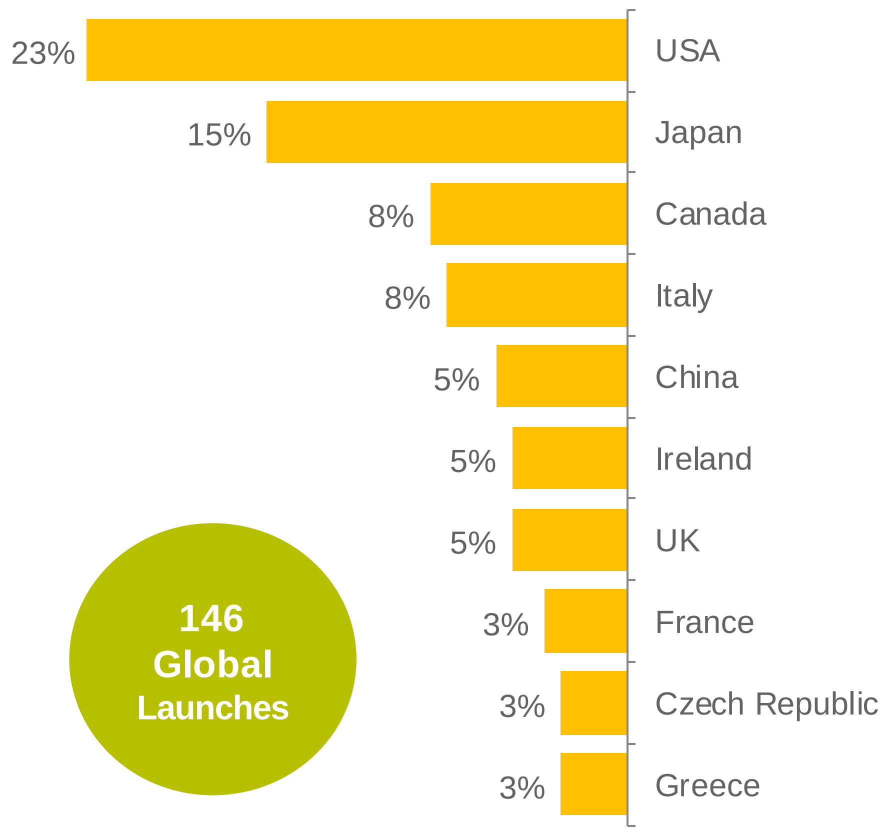
- Globally, there were 146 products launched, which was in line with previous trends.
- There were no products containing lettuce as an ingredient launched in Australia over the last three months.
- The majority of products were launched in Europe (38%), North America (31%) and Asia Pacific (28%).
- Flexible formats (34%) and trays (18%) remained the main packaging formats used.
- The top categories for launches were meals (36%), fruit and vegetables (34%) and juice drinks (23%), which was consistent with previous trends.
- The key claims used over the past three months were ease of use (35%), no additives and preservatives (29%) and environmentally friendly packaging (19%).
- The most innovative launches found were lettuce and cucumber watery essence skin care product launched in Thailand. Examples of these can be found over the next slides.

Source: Mintel (2014)

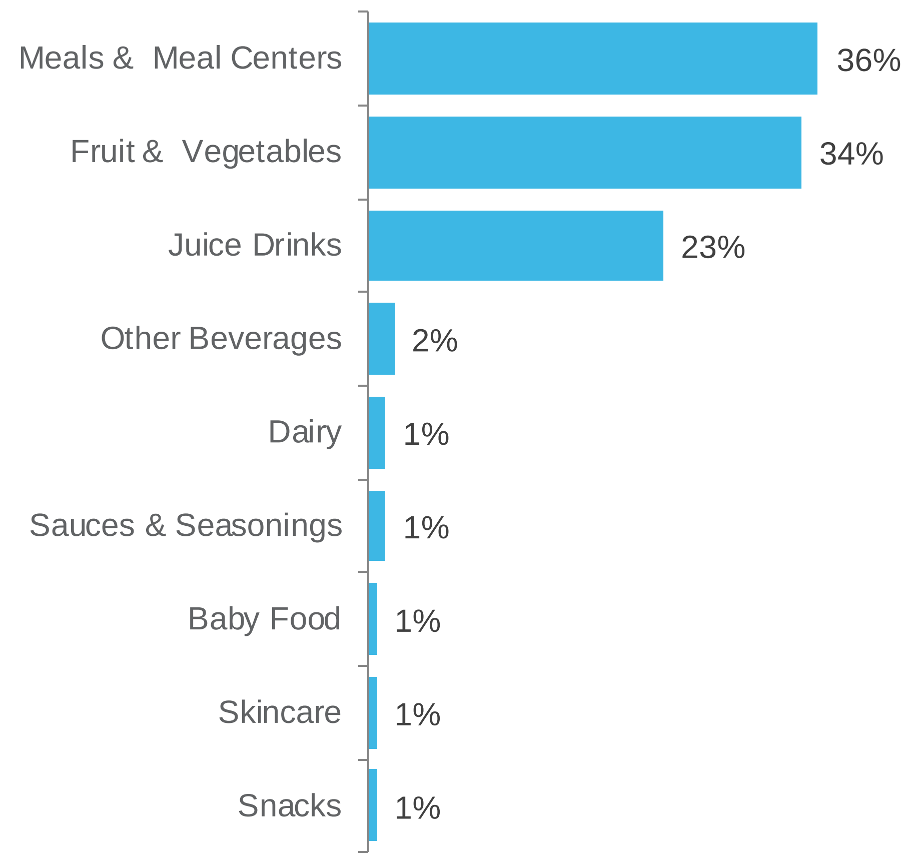
The main countries for products launched were USA, Japan and Canada.

Consistent with previous trends, launches were in meals, fruit and vegetables and juice categories.

Top Launch Countries



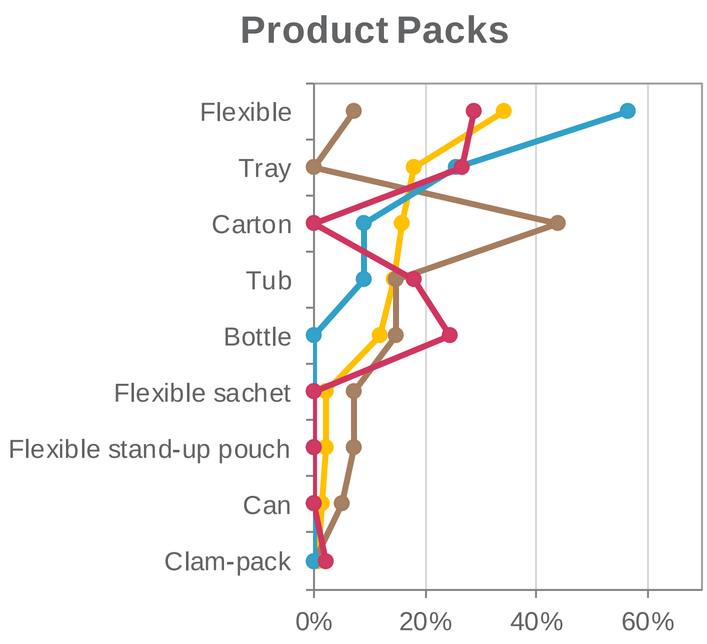
Top Launch Categories

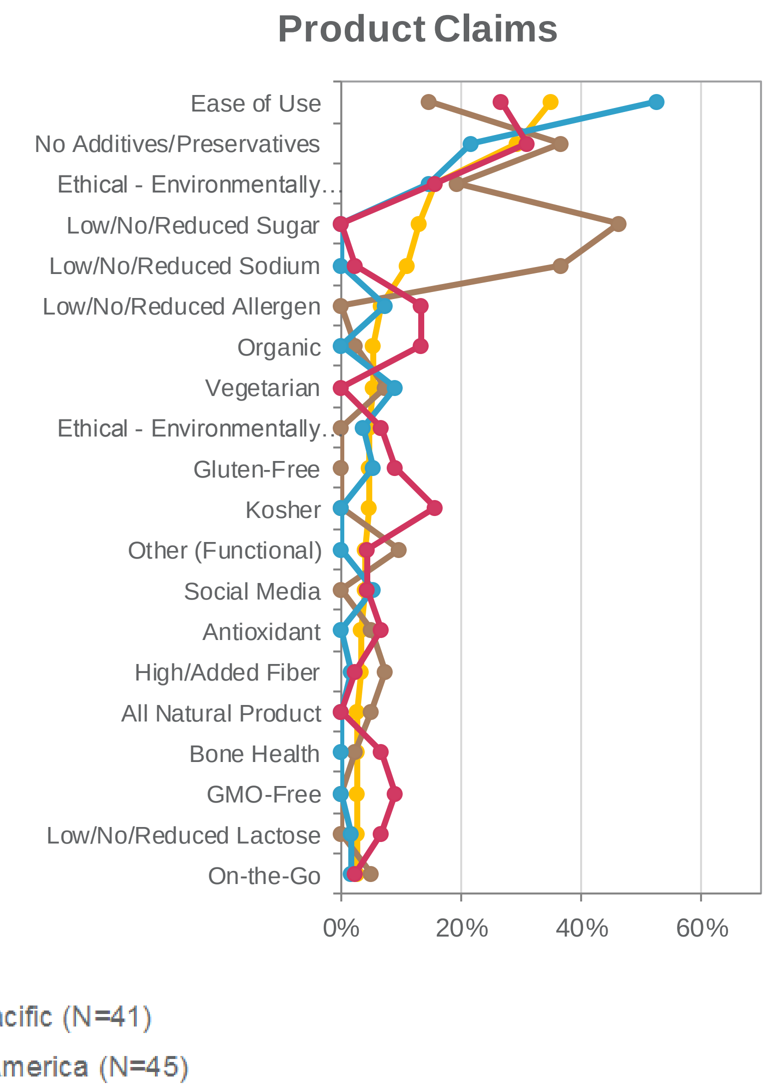


Number of Global Lettuce NPDs for the L3M N=146

Product claims were around ease of use and health (including low sodium, sugar, allergens). This was relatively consistent across regions, however Asia Pacific was more likely to use health claims on products.

Flexible packs were most commonly used in North America and Europe, where as cartons were preferred formats in Asia Pacific.





Only regions with n >30 are displayed

Innovative Lettuce Launches:
L3M (September – November 2014)

Skin Food Premium Lettuce & Cucumber Watery Essence (Thailand)

Skin Food Premium Lettuce & Cucumber Watery Essence is formulated with 10% lettuce extract, 10% cucumber extract and 30% cucumber water. The cool essence is designed to help hydrate and protect against fine lines, and retails in a 50ml pack.

Claims:
Botanical/Herbal, Moisturising / Hydrating

Albertsons Fresh-Made Burger Pack (Canada)

Albertsons Fresh-Made Burger Pack features vegetables that have been freshly cut in store. The product retails in a 32-oz. pack.

Claims:
N/A

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)

Gulong Pickled Lettuce (China)

Gulong Xiang Cai Xin (Pickled Lettuce) has been repackaged and is suitable for vegetarians. This product now retails in a newly designed 170g can.

Claims:
Vegetarian

Source: Mintel (2014)

Horticulture Innovation Australia

Innovative Lettuce Launches:
L3M (September – November 2014)

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.

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

Joni Juice Beet Me Raw Cold Pressed Juice (USA)

Joni Juice Beet Me Raw Cold Pressed Juice is now available. The HPP product is 100% raw never heated juice, and comprises beet, apple, cucumber, romaine lettuce, dandelion and lime. It retails in a 16-fl.oz. pack featuring the Facebook logo.

Claims:
Social Media

Delhaize Vegetable Snack (Belgium)

Delhaize Snack Crudités (Vegetables Snack) is now available. This already washed and ready-to-use product retails in a 150g pack.
.

Claims:
Ease of Use

Peacock Food Collection Yogurt Corn Salad (South Korea)

Peacock Food Collection Yogurt Corn Salad consists of corn salad, washed fresh vegetables including red beet leaves, romaine lettuce and lettuce, almond cranberry topping, and fresh yogurt dressing. The product retails in a 285g pack.

Claims:
N/A

Source: Mintel (2014)

Innovative Lettuce Launches:
L3M (September – November 2014)

Kagome Light Drinkable Salad Juice (Japan)

Kagome Shokuji To Issho Ni Nomu Salad (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.

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

Fresh Express Veggie Lover's Salad (Canada)

Fresh Express Veggie Lover's Salad is described as thoroughly washed and ready-to-eat salad. The product is described as a good source of vitamin A, which is said to aid normal bone and tooth development. It comprises iceberg and romaine lettuces, carrots, pea pods, red cabbage and radishes.

Claims:
Ease of Use, No Additives/Preservatives, Bone Health

Nature's First Veggies To Go Spicy Vegetable Juice (India)

Nature's First Veggies To Go Spicy Vegetable Juice is 100% all natural. This juice is said to be made with an array of healthy vegetables blended together to make a nutritious and delicious juice, and is claimed to be packed with vitamins and minerals. The vegetarian product retails in a 1000ml pack.

Claims:
All Natural Product, Vegetarian, On-the-Go

Yili QQ Star Jun Shan Children Growing Up Milk (China)

Yili QQ Star Jun Shan Er Tong Cheng Zhang Niu Nai (Children Growing Up Milk) is made using the following: quality milk; five types of bean powder including red bean, black bean and soybean; ten types of fruit juices including orange, blueberry and hawthorn; 10 grains including oat, corn and black rice.

Claims:
Halal, Prebiotic, Other (Functional), Vitamin/Mineral Fortified, Children (5-12)

Source: Mintel (2014)

Sweet Corn.

Purchase and consumption is trending higher across waves.

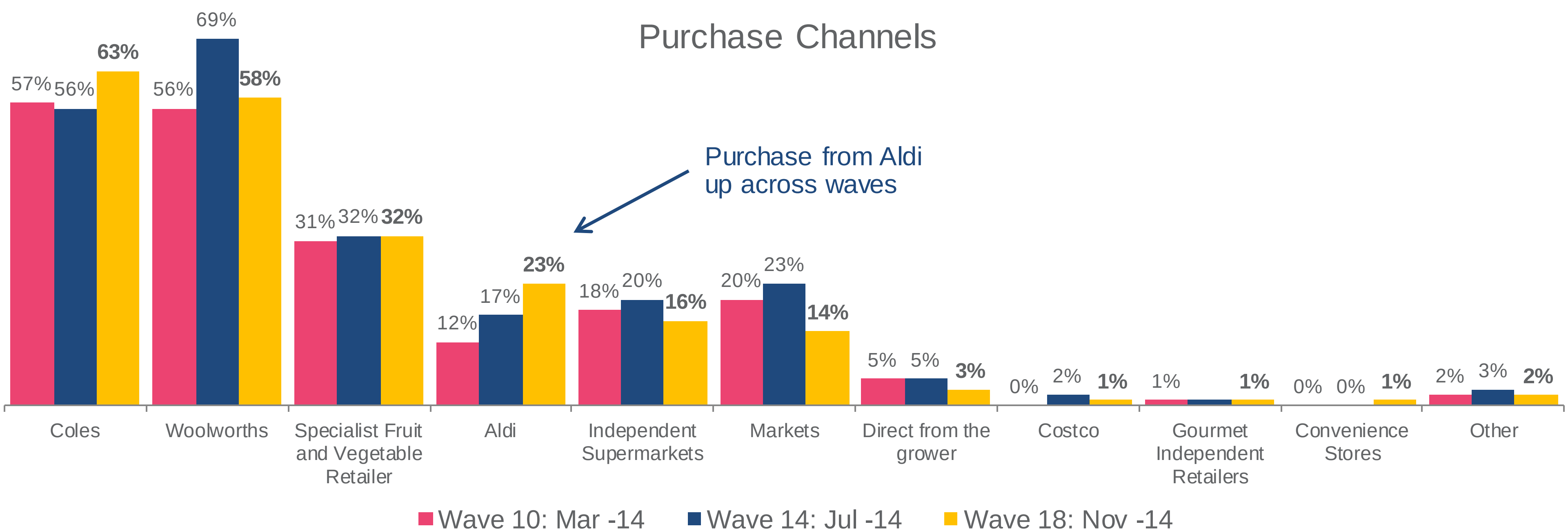
Purchase remains primarily through Coles and Woolworths.

Average Purchase **3.6** times per month

▼ 3.0 times, Wave 10
▼ 3.4 times, Wave 14

Average Consumption **6.7** times per month

▼ 5.8 times, Wave 10
▼ 6.2 times, Wave 14



Q1. On average, how often do you purchase <commodity>?
Q2. On average, how often do you consume <commodity>?
Q5. From which of the following channels do you typically purchase <commodity>?
Sample Wave 6 N=324, Wave 10 N=301, Wave 14 N=308

Horticulture Innovation Australia

colmar brunton.

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

Average Spend and Price Sensitivity

Average weight of purchase

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

— 900g, Wave 10
— 900g, Wave 14

Recalled last spend

Recalled last spend on sweet corn purchase was **$4.30,** which is line with July's spending.

▼ $3.60, Wave 10
— $4.30, Wave 14

Value for money

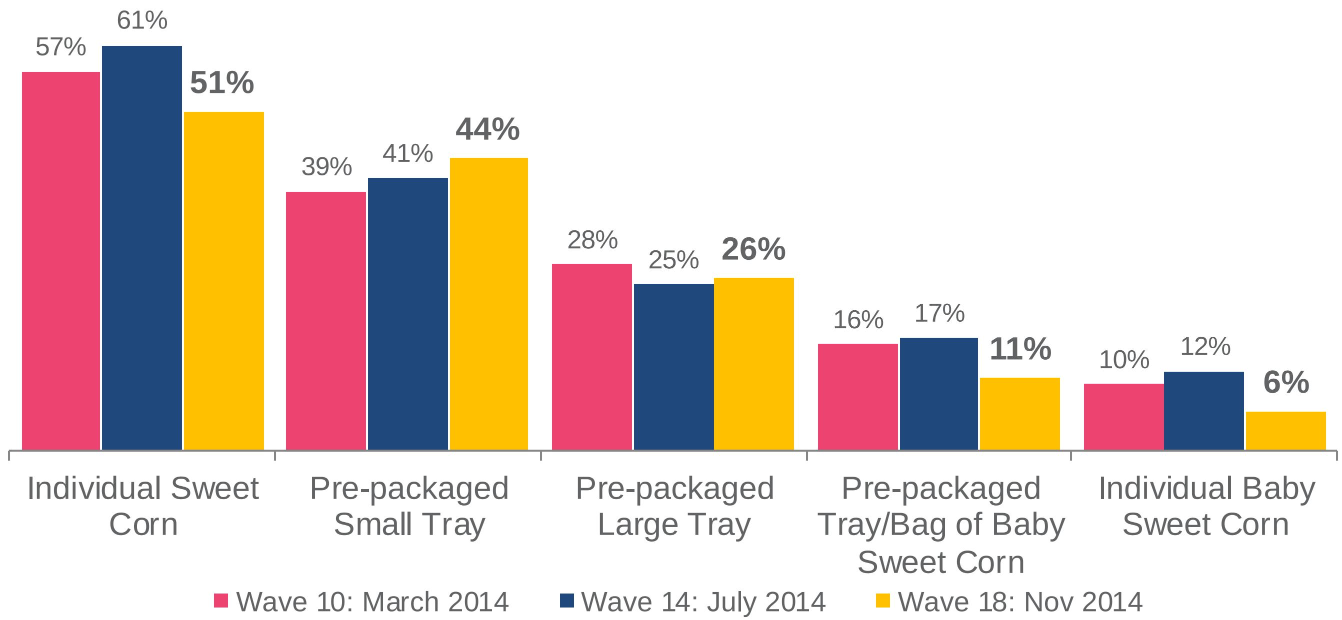
Consumers' perceived value for money was good **(6.5/10)**, which has risen from a fall in July.

— 6.5/10, Wave 10
▼ 6.1/10, Wave 14

Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is?
Sample Wave 6 N=324, Wave 10 N=301, Wave 14 N=308

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

There has been a steady increase in purchase of small sweet corn trays, however individual formats remain the preferred format.

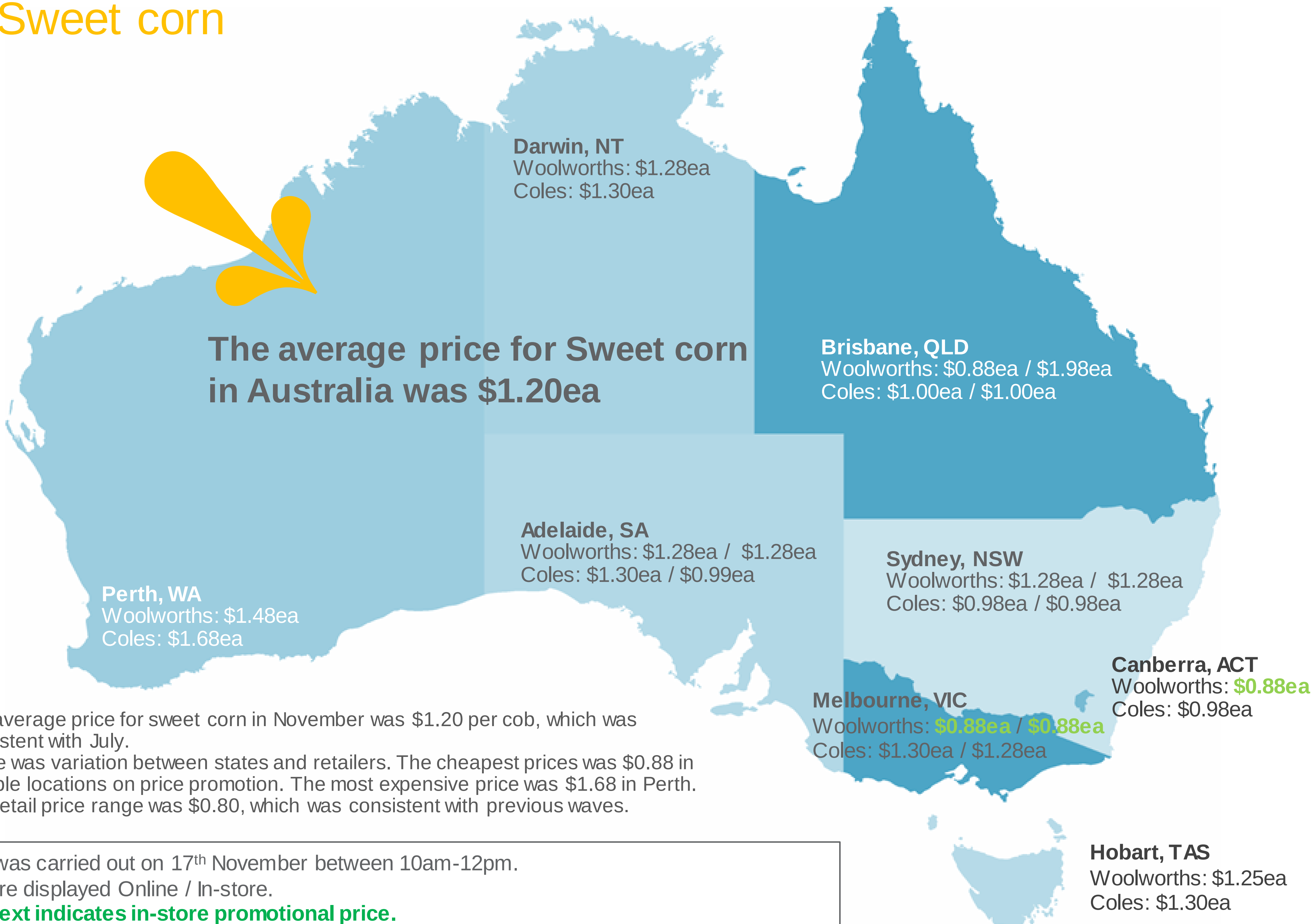


Average Amount Purchased	Individual Sweet Corn	Pre-package Small Tray	Pre-packaged Large Tray	Pre-packaged Baby Sweet Corn	Individual Baby Corn
Wave 10: March 2014	3.4	1.7	1.7	1.8	5.6
Wave 14: July 2014	3.5	1.8	1.8	2.5	5.8
Wave 18: Nov 2014	3.4	1.6	1.5	2.5	4.4

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

Online and In-store Commodity Prices

Sweet corn

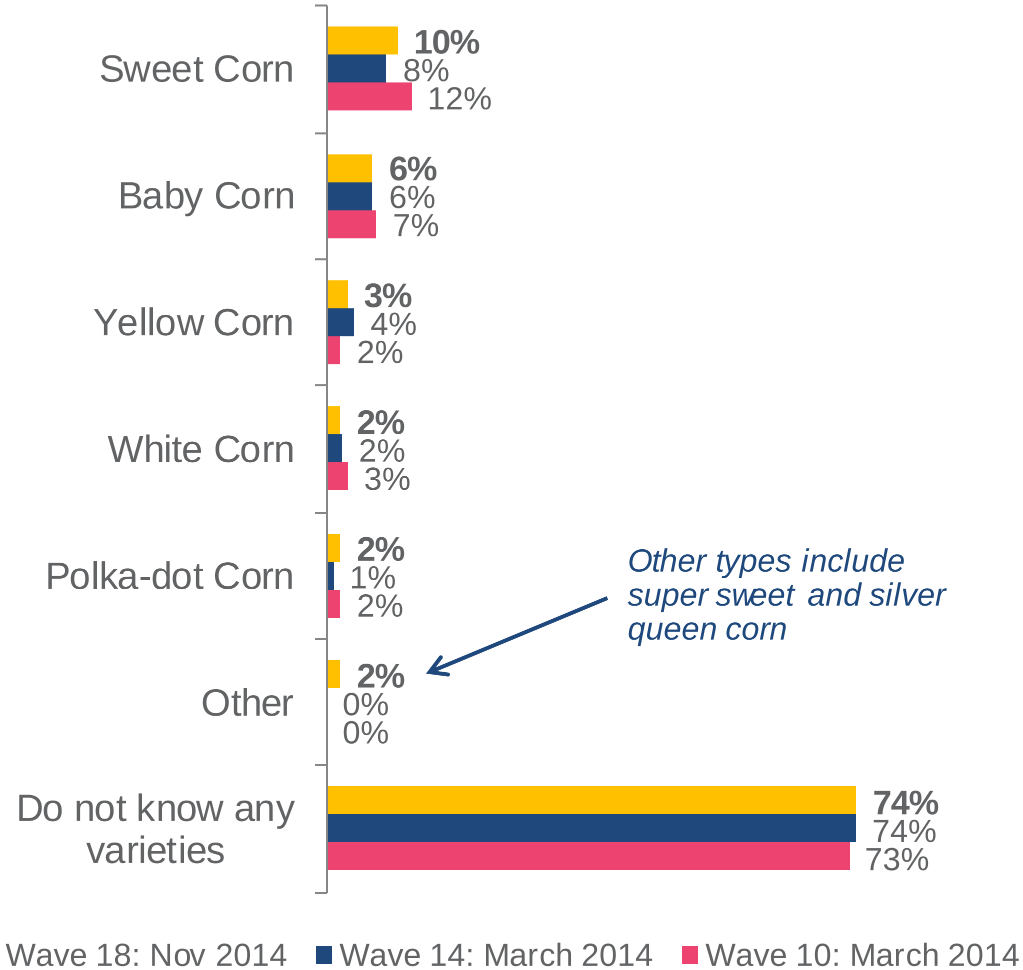


- The average price for sweet corn in November was $1.20 per cob, which was consistent with July.
- There was variation between states and retailers. The cheapest prices was $0.88 in multiple locations on price promotion. The most expensive price was $1.68 in Perth.
- The retail price range was $0.80, which was consistent with previous waves.

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

Awareness of corn remains very low.

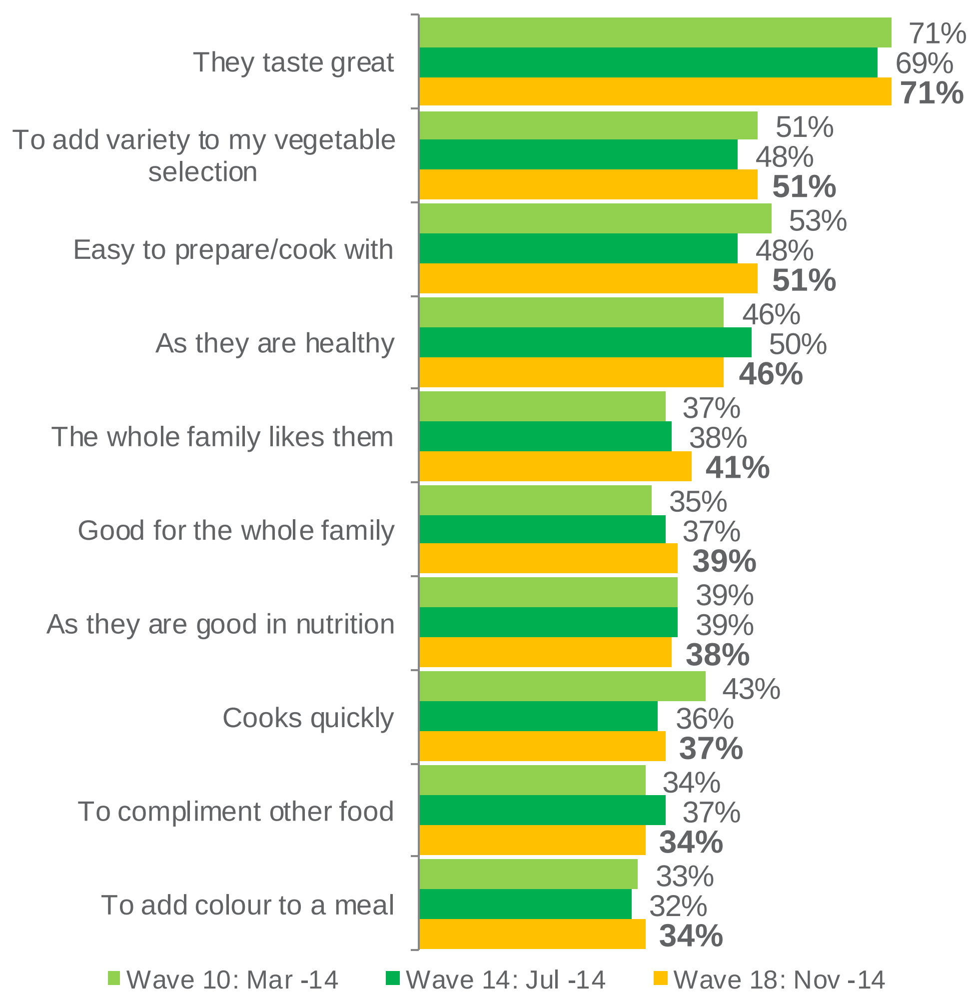
Sweet corn remains the most recalled type.



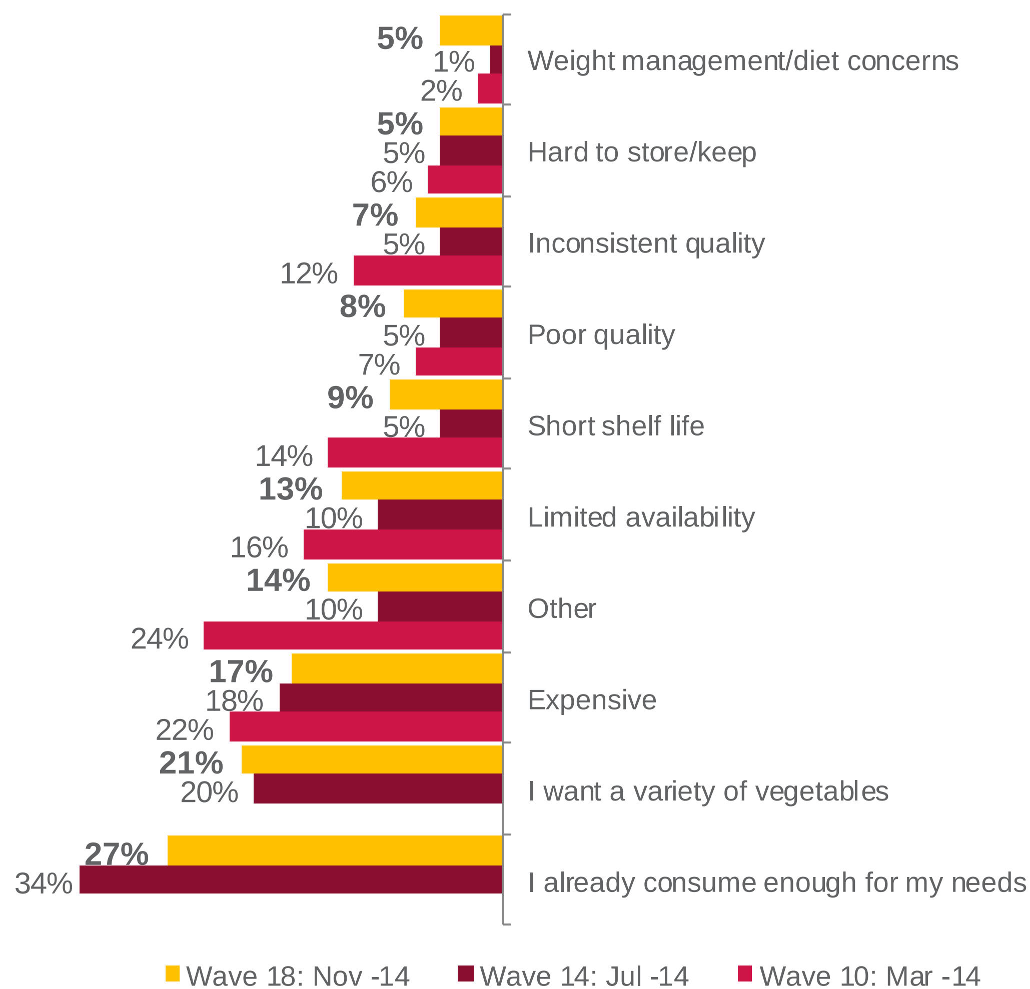
Q6a. What varieties of <commodity> are you aware of? (unprompted)
Sample Wave 6 N=324, Wave 10 N=301, Wave 14 N=308

Taste remains the key purchase trigger for corn, consistent across waves. Consuming enough for my needs is the main barrier to purchase.

Triggers



Barriers



Q7. Which of the following reasons best describes why you purchase <commodity>?
Q8. Which reason best describes why you don't buy <commodity> more often?
Sample Wave 6 N=324, Wave 10 N=301, Wave 14 N=308

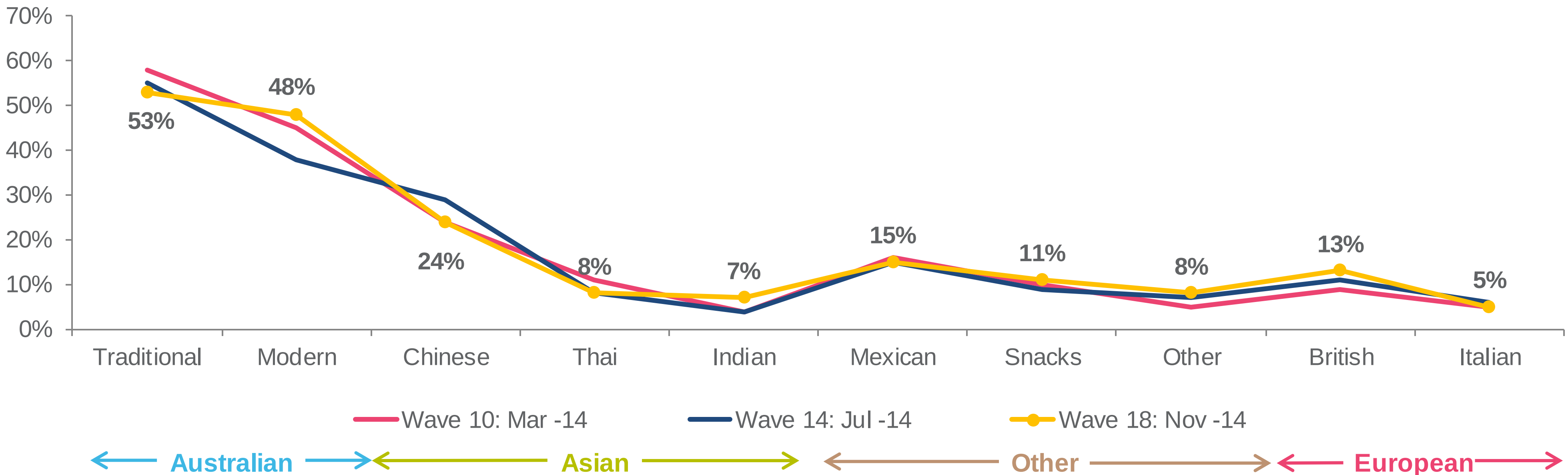
Dinner consumption occasions has strengthened across waves.

Corn continues to be cooked most frequently in Australian cuisine.

Top 5 Consumption Occasions

	Wave 18	Wave 14	Wave 10
Weekday Dinner	**58%**	52%	54%
Weekend Dinner	**41%**	34%	34%
Quick Meals	**32%**	26%	28%
Family meals	**31%**	37%	36%
Every-day meals	**24%**	24%	27%

Typical Cuisine Cooked



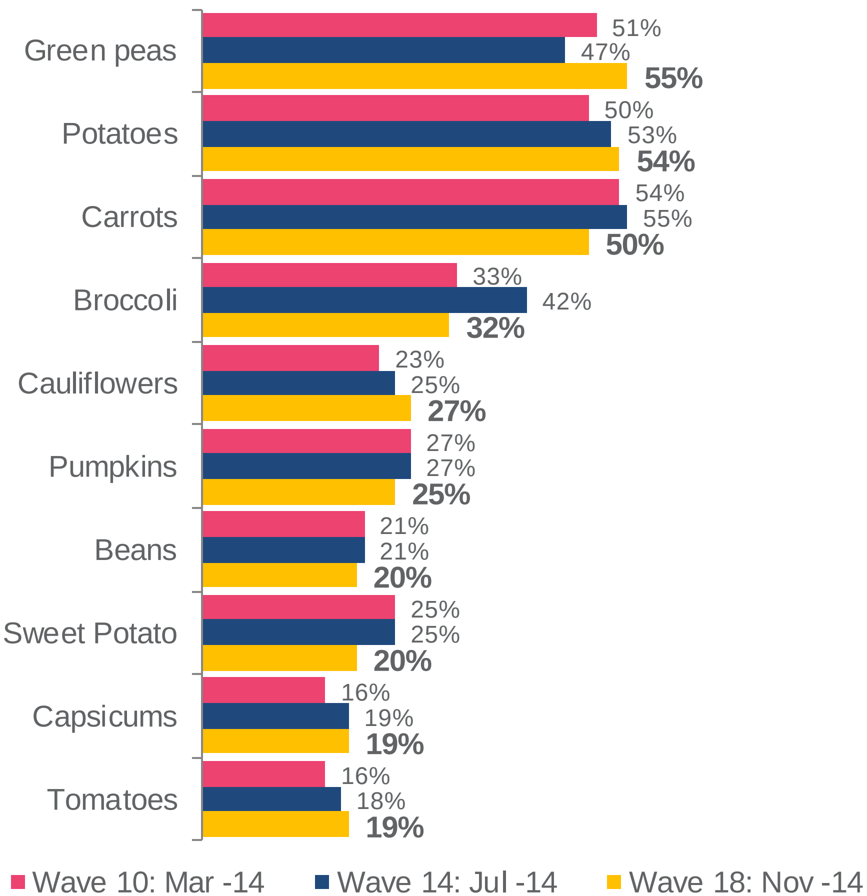
Sample Wave 6 N=324, Wave 10 N=301, Wave 14 N=308
Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?

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

Boiling continues to be the main cooking method, however steaming and microwave are also common.

Corn is typically served with green peas, potatoes and carrots.

Top 10 Accompanying Vegetables



Top 10 Cooking Styles

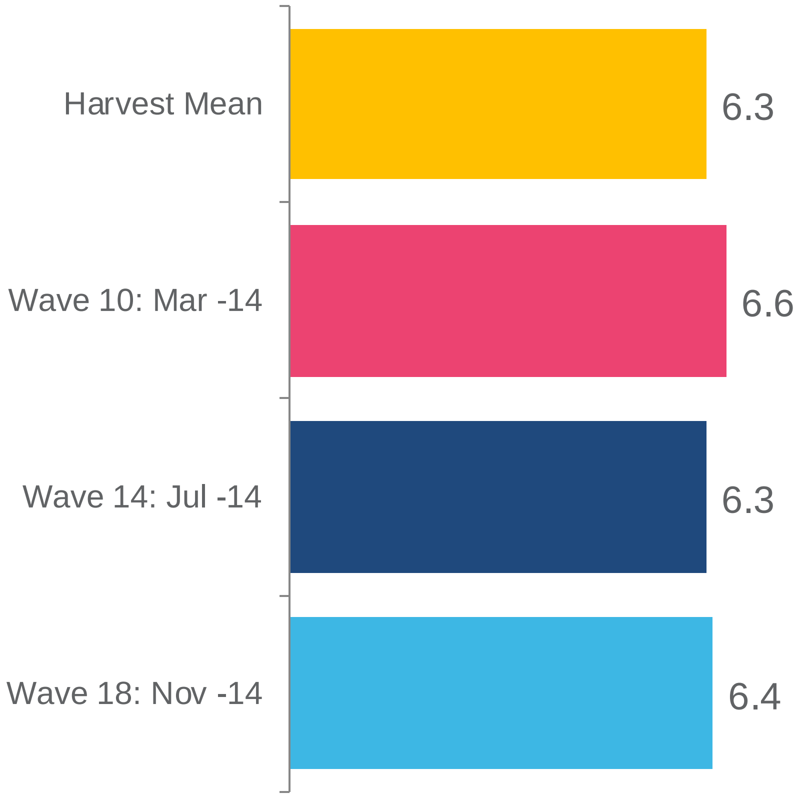
	Wave 10	Wave 14	Wave 18
Boiling	51%	54%	54%
Steaming	42%	39%	46%
Microwave	30%	33%	31%
Stir frying	14%	18%	16%
Soup	11%	19%	15%
Grilling	10%	12%	13%
Roasting	9%	9%	10%
Raw	5%	6%	6%
Blanche	3%	6%	6%
Frozen	5%	7%	6%

Sample Wave 6 N=324, Wave 10 N=301, Wave 14 N=308
Q9. How do you typically cook <commodity>?
Q10a. And w hen are you serving <commodity> w hich of the follow ing do you also serve together w ith this ?

Horticulture Innovation Australia

colmar brunton.

There has been little variation in the importance of sweet corn provenance. Overall, it remains relatively important to consumers.



AUSTRALIAN MADE

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

Horticulture Innovation Australia

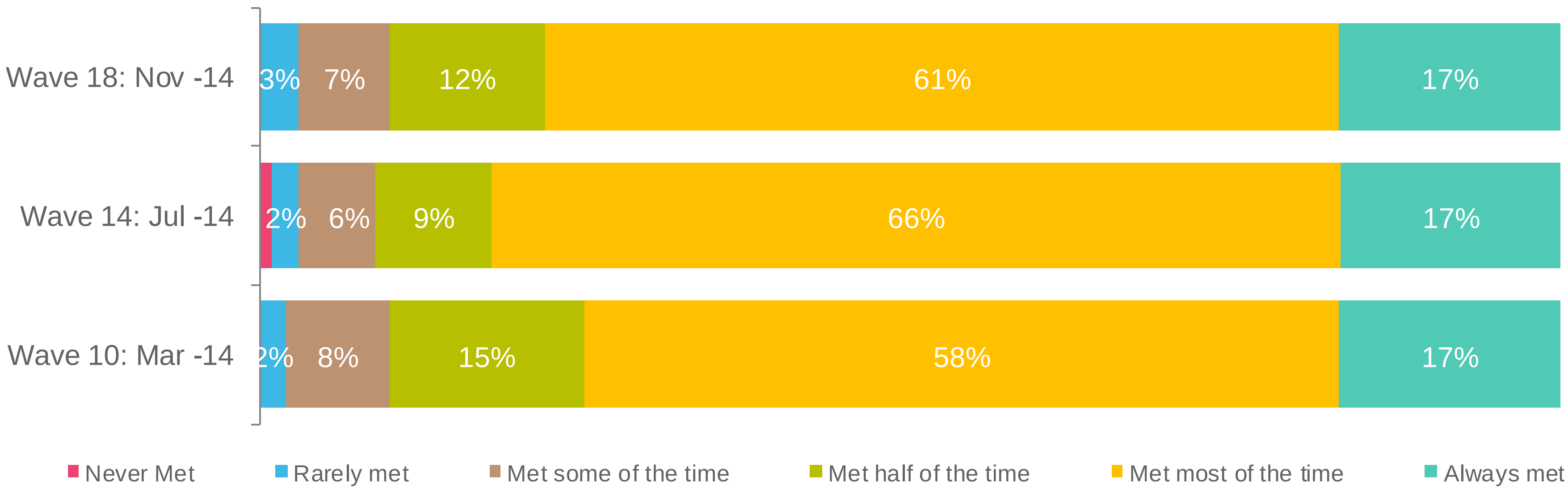
colmar brunton.

Expected to stay fresh for **7.9** days

▼ 7.7 days, Wave 10
▲ 8.0 days, Wave 14

Corn freshness has remained relatively stable across tracking months. Similarly, expectations of freshness are consistent between waves.

Expectations Met



Sample Wave 6 N=324, Wave 10 N=301, Wave 14 N=308
Q12. How long do you expect <commodity> to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy <commodity> ?

Horticulture Innovation Australia
colmar brunton.

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

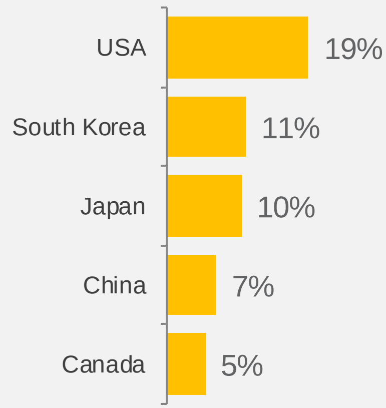
Trends:
Sweet Corn

Sweet Corn Global NPDs

September – November 2014

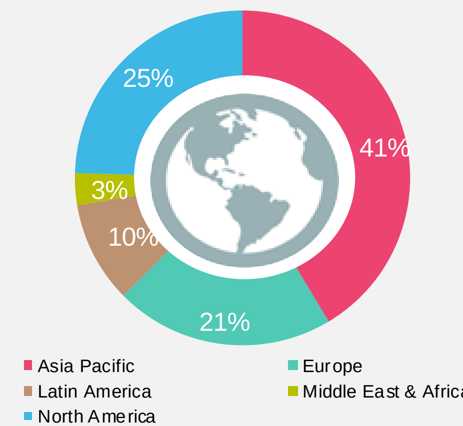
There were 326 sweet corn products launched globally over the last three months. The majority of launches were in USA. Categories for launches were meals and snacks. Key packaging for sweet corn products was flexible formats.

Country

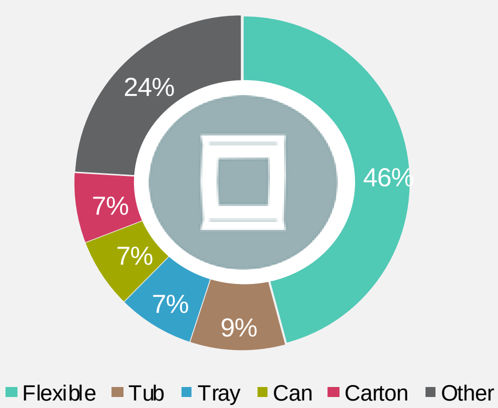


326 Global NPDs

Region



Top Pack Formats



Categories

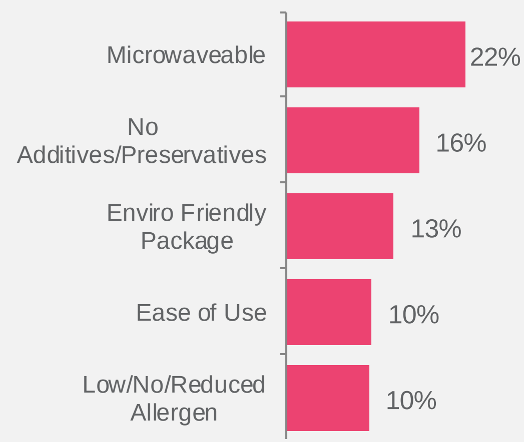
Meals 24%

Snacks 17%

Bakery 15%

Fruit & Vegetables 10%

Top Claims



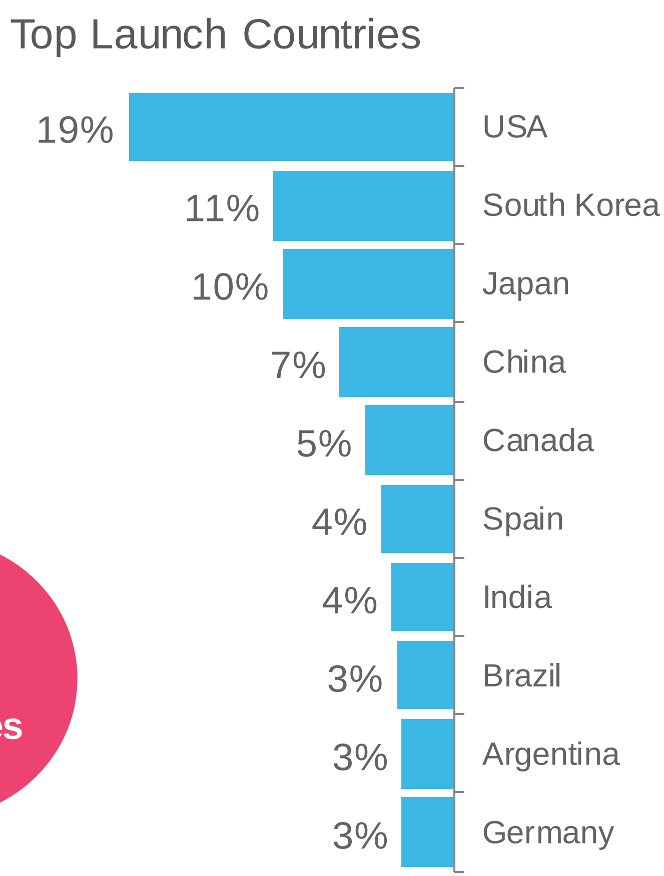
Sweet Corn Product Launches:
Last 3 Months (September – November 2014)
Summary

- There were 337 products launched in the last 3 months globally that contained sweet corn as an ingredient. This was consistent with previous trends.
- There is one product launched in Australia over the past three months.
- Consistent with previous months, Europe (34%), North America (29%) and Asia Pacific (26%) were the key region for launches.
- Flexible packaging 31%) remained the most common format used for products.
- The main categories for launches were meals (20%), bakery goods (12%) and snacks (12%).
- Claims used on products highlighted convenience; microwaveable (22%) and ease of use (13%) and health; no additives/preservatives (19%) and environmentally friendly packaging (17%).
- The most innovative products launched were oats and corn soup mix and sweet corn flavoured biscuit sticks. Examples of these can be found in the following pages.

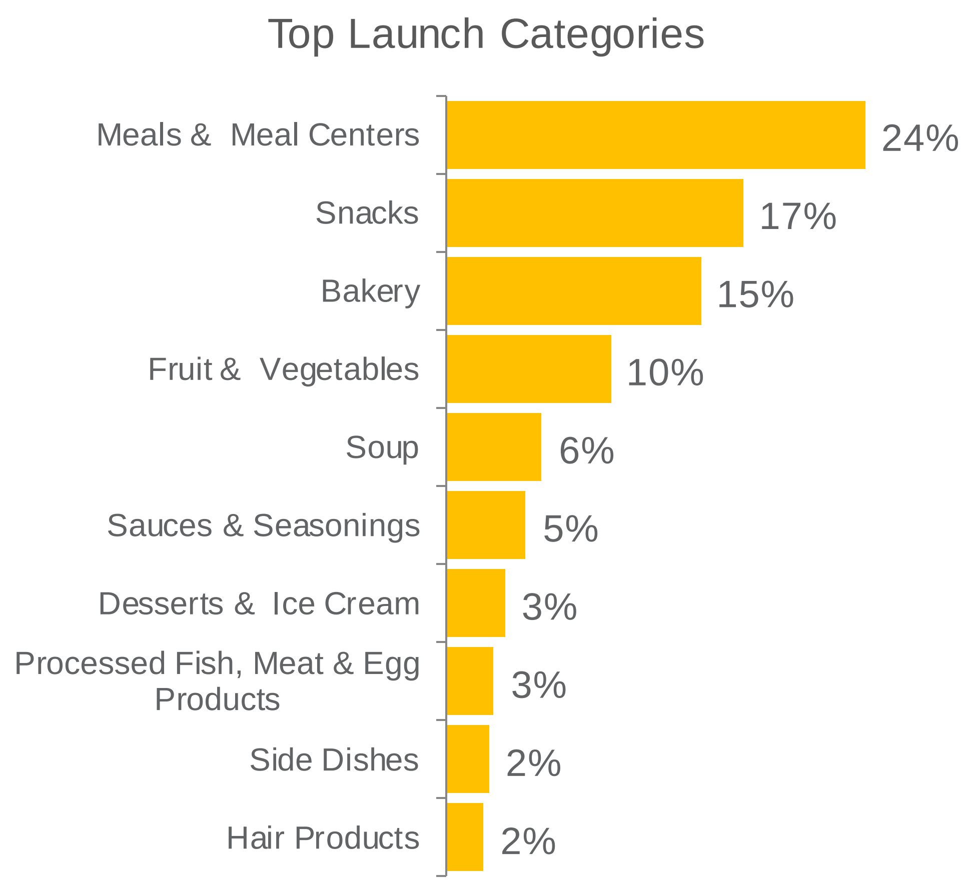
Source: Mintel (2014)

The majority of launches occur in USA, with a large number also occurring in Asia.

The key categories for corn launches are meals, snacks and bakery items.

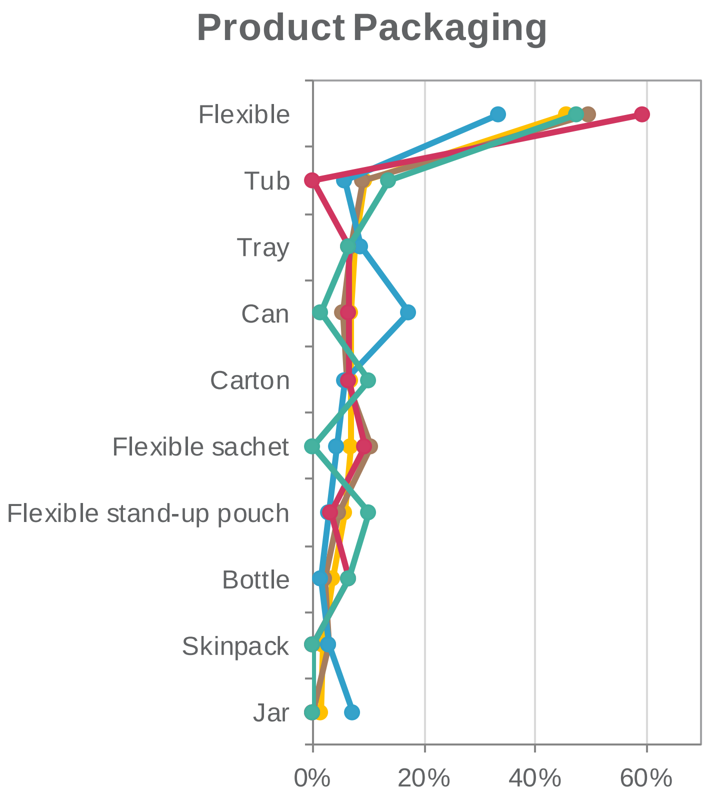


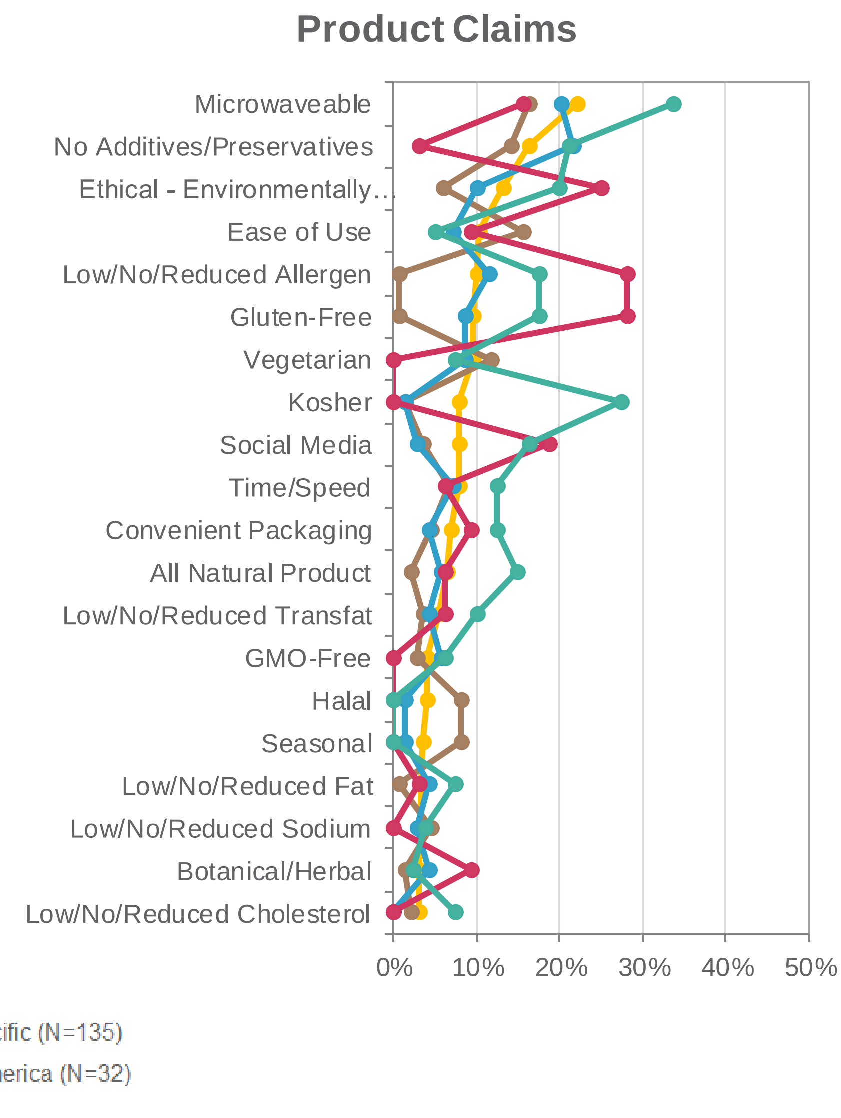
326 Global Launches



There is a large degree of variation in claims used globally. North American were more likely to launch microwavable products, whilst health was more important for products in Latin America.

Flexible packaging is primarily used for corn products, consistent across regions.





Only regions with n >30 are displayed

Innovative Sweet Corn Launches:

L3M (September – November 2014)

Daohuaxiang Corn Juice (China)

Daohuaxiang Yu Mi Jiang (Corn Juice) contains added sugar and greater than or equal to 30% of sweetcorn juice. This nectar is said to be nutritious and retails in a 1.25L pack.

Claims:
N/A

Tohato Gachimoro Grilled Corn Stick Snack (Japan)

Tohato Gachimoro Grilled Corn Stick Snack is made with GMO-free corn. This product retails in a 40g pack. Launched on July 7th 2014, open-priced.

Claims:
GMO-Free

Newtteure Sweet Corn Hot Dog (South Korea)

Newtteure Sweet Corn Hot Dog is microwavable in forty seconds. The sausage in the product contains whole sweet corn and retails in a 130g pack, which includes ketchup.

Claims:
Time/Speed, Microwaveable

Grand Sweet Corn Cream Bread (South Korea)

Grand Sweet Corn Cream Bread is described as fresh and homemade and is filled with a sweet delicious cream. The product retails in a 90g pack.

Claims:
N/A

Source: Mintel (2014)

Innovative Sweet Corn Launches:
L3M (September – November 2014)

House Stew Mix Sweet Corn Stew Mix (Japan)

House Stew Mix Sw eet Corn Stew Mix is repackaged. It has a mildly delicious flavour of bouillon. It comes in easily melted granule format, and retails in a 190g pack. Launched on August 18, 2014 w ith an RRP of 259 yen.

Claims:
Ease of Use

Minori Bakery Crunchy Corn Potato Bun (Japan)

Minori Bakery Crunchy Corn Potato Bun is made w ith Shakitto! Corn brand corn from Hokkaido, and Sayaka flour from Hokkaido. Launched on August 5, 2014 w ith an RRP of 135 yen.

Claims:
Cobranded

Dole Garden Soup Southwestern Black Bean & Corn Soup (USA)

Dole Garden Soup Southw estern Black Bean & Corn Soup offers an all natural recipe low in fat and calories and w ithout cholesterol. The soup is said to have the fresh taste of vegetable straight from the garden.

Claims:
No Additives/Preservatives, All Natural Product, Low /No/Reduced Allergen, Low /No/Reduced Cholesterol, GMO-Free, Low /No/Reduced Calorie, Convenient Packaging

Peacock Food Collection Yogurt Corn Salad (South Korea)

Peacock Food Collection Yogurt Corn Salad consists of corn salad, w ashed fresh vegetables including red beet leaves, romaine lettuce and lettuce, almond cranberry topping, and fresh yogurt dressing. The product retails in a 285g pack.

Claims:
N/A

Source: Mintel (2014)

Innovative Sweet Corn Launches:
L3M (September – November 2014)

Win 2 Cornbis Original Flavoured Sweet Corn Crackers (Vietnam)

Win 2 Cornbis Banh Quy Ngo Ngot (Original Flavoured Sweet Corn Crackers) is halal certified and suitable for vegetarians. The product retails in a carton containing 30 18g packets.

Claims:
Halal, Vegetarian

Pokka Sapporo Jikkuri Koto Koto Coarse Corn Potage (Japan)

Pokka Sapporo Jikkuri Koto Koto Arabiki Corn (Coarse Corn Potage) is repackaged. The thick soup is made with super sweet corn with rich sweet flavour, chicken bouillon and special cream powder. The product retails in a 3 x 24.6g pack. Launched on August 18, 2014 with an RRP of 248 yen.

Claims:
N/A

Giant Eagle Cowboy Caviar Hot Salsa (USA)

Giant Eagle Cowboy Caviar Hot Salsa is made with corn, black beans and adobo sauce. The gluten-free product is kosher certified and retails in a 16-oz. pack.

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

Vivi Wellness Delicate Condiment for Vegetable Rice Salad (Italy)

Vivi Wellness Farciriso Delicato (Delicate Condiment for Vegetable Rice Salad) is now available. This product is free from oil and retails in a 1000g jar.

Claims:
N/A

Source: Mintel (2014)

Australian Sweet Corn Launches:
L3M (September – November 2014)

Patties East Meets West Entertaining Pack

Patties East Meets West Entertaining Pack has been repackaged. The product consists of 12 sweet chilli money bags, 12 cocktail spring rolls, 12 mini party pies and 12 mini party sausage rolls. It can be served in 15 minutes and retails in a 1kg recyclable pack containing 48 units and featuring a QR code.

Claims:
Ethical - Environmentally Friendly Package, Microwaveable

In the Media.

General Vegetable News
(September - November 2014)

- Vegetable ice cream has been making an appearance on restaurant menus in both Sydney and Melbourne. The ice-cream plays on the natural sweetness in vegetables such as carrot, parsnip and beetroot. The article acknowledges vegetable desserts popular in Mexico- pumpkin, Japan-sweetpotato and Japan- sweetcorn based desserts.

  Good Food article, The Age (18/11/14)

- 96% of Australians say they regularly consume snack foods. Two thirds of consumers indicated that they consumed a fresh fruit snack in the last 30 days. Vegetables did not rate as a popular snack food. Consumers are looking for healthy, low fat products with no artificial colours or flavours- presenting a real opportunity for vegetables in this space.

  www.ausfoodnews.com.au

Commodity News
(September – November 2014)

- A research project conducted at Johns Hopkins School of Medicine in USA found that a broccoli extract found to be transformative in treatment of autism.

www.abc.net.au

- The American Institute for Cancer Research presented new evidence that the compound that give chillies their heat, capsaicin, drives the death of aggressive, small cell lung cancer cells and slows tumour growth in mice.

www.freshplaza.com

- Toshiba has the most advanced lettuce production in the world. They are growing lettuce out of a factory that used to produce floppy disks. At full capacity the factory will be able to produce 8,400 heads of lettuce per day, that will not need washing before consumption.

www.geek.com/science

- Hersey confectionary is looking at replacing its high-fructose corn syrup with sugar in some of their chocolate bars. The move has come from consumer feedback on the negative impact of high-fructose corn syrup including fuelling weight gain and diabetes, both of which are unsupported by health experts.

www.dailymail.co.uk

Thanks.