Monthly Tracker Report Wave 19: Celery, Cucumber, Eggplant & Zucchini

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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 online 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 online tracking program and trends analysis components.

This wave's report (Wave 19, December 2014) focuses on:

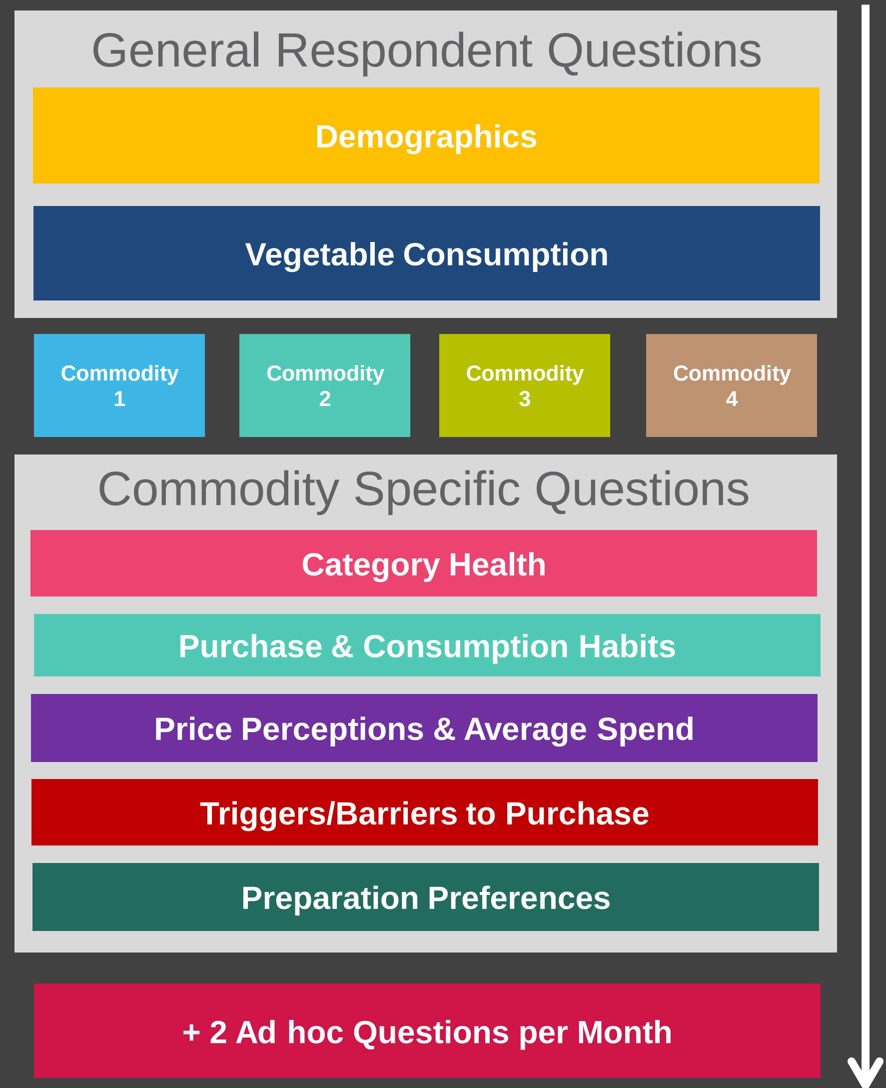
- Celery
- Cucumber
- Eggplant
- Zucchini

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

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

Online Methodology.

- Respondents are recruited via an Online Panel. If the respondents meets the recruitment requirements of sufficient vegetable consumption (monthly) they are asked to complete the online questionnaire.
- All respondents complete general demographic and consumption questions. If respondents purchased any of the specific commodities within the last month they then complete those questions. A minimum of N=300 respondents per commodity completed the questionnaire.
- Topics covered in the questionnaire are vegetable purchase and consumption, category health, price and value perceptions, triggers and barriers to purchase and preparation and cooking preferences.
- An additional 2 ad-hoc questions are asked at the end of the questionnaire. The subjects of these questions are supplied by Horticulture Innovation Australia prior to each month to get feedback on topics of interest at that time.
- The questionnaire takes 15 minutes to complete.
- Questions asked appear on the bottom of each page of this report. Unless stated otherwise, all scales were 0 -10 scales, with higher scores indicating greater agreement/liking/importance etc.



Sample.

In total, 696 respondents completed the questionnaire this wave. Respondents represent most states and territories, as well as both metro and rural areas.

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

To qualify for the questionnaire, respondents...

⇛Are aged 18 years and over

⇛Purchase fresh vegetables at least once a month

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

⇛Are the main or joint grocery buyer

	Total N=696	Celery n=358	Cucumber n=359	Eggplant n=304	Zucchini n=357
Gender					
Male	41%	42%	39%	44%	38%
Female	59%	58%	61%	56%	62%
Age					
18-24 y.o.	7%	8%	8%	9%	6%
25-34 y.o.	17%	15%	17%	23%	15%
35-44 y.o.	18%	16%	17%	20%	18%
45-54 y.o.	21%	21%	21%	19%	21%
55-64 y.o.	18%	20%	18%	16%	19%
65+ y.o.	18%	20%	19%	13%	21%
Household					
Single Income no Kids	18%	18%	15%	21%	17%
Double Income no kids	17%	15%	16%	20%	17%
Young Families	18%	16%	19%	19%	16%
Established Families	23%	25%	23%	21%	23%
Empty Nesters	24%	25%	26%	19%	27%
Location					
New South Wales	28%	28%	28%	27%	28%
Victoria	27%	27%	27%	27%	27%
South Australia	13%	12%	13%	17%	11%
Queensland	18%	20%	18%	14%	20%
Western Australia	10%	9%	9%	12%	10%
Tasmania	2%	2%	3%	1%	2%
Australian Capital Territory	2%	1%	1%	3%	1%
Northern Territory	0%	1%	1%	0%	0%

Trends Research: Our Approach

- Colmar Brunton has used a combination of both desk research and in the field of market research to explore the trends of each vegetable commodity being tracked this month.
- Our main source of secondary data for this report was collected from Mintel Global New Products Database (GNPD).
- This data source is used to analyse products launched around the globe in the last 3 months (L3M) that contained each vegetable being tracked as a core ingredient.
- Trends are determined at a global and regional level.
- Claims and pack types used for the launched products are explored and the relevant product categories are determined. Specific examples of products being launched around the globe that are particularly innovative are displayed for reference.
- Trend reports are provided monthly and will reflect the 4 commodities tracked in the preceding period.

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

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

Country

Top countries where products were launched.

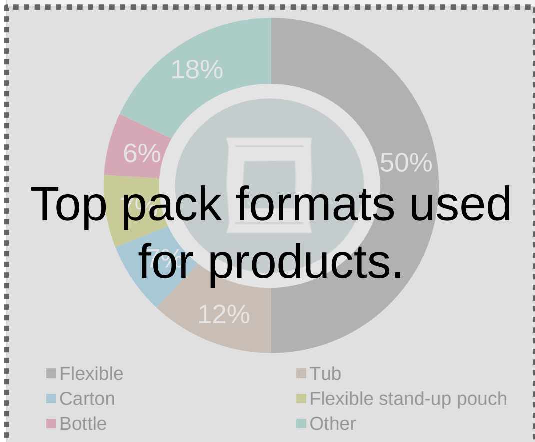
Commodity

Number of Launches L3M

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.

Wave 19:
Executive Summary

Celery Grower Action Plan

Taste and nutrition are increasingly influential in the purchase of celery.

1. Insight:

Celery is primarily consumed raw and health is a key influence on purchase.

Recommendation:

With a global trend towards healthy and clean eating, provide consumers with specific nutritional information, such as low GI and high in vitamin K. Educate consumers on multiple ways to consume raw celery, snacks, juices, smoothies and salads.

2. Insight:

Cooking cuisines has seen considerable variability over past waves.

Recommendation:

Keep trial and repeat purchase high through promotion of recipe cards that contain multiple recipes, including Australian, Chinese and Italian dishes that highlight the versatility of celery.

3. Insight:

There is a continued trend towards purchase of whole celery, with a decline in half formats.

Recommendation:

Investigate if pricing may be inhibiting purchase of half celery bunches. Need to ensure there are a variety of formats available to meet different cooking and consumption needs.

Cucumber Grower Action Plan

6.2/10

Consumers perceive cucumbers as good value for money, however there is room for improvement.

1.

Insight:

Short shelf life remains as a primary barrier to purchase.

Recommendation:

Investigate innovation in packing and transportation that could prolong shelf life once harvested. Confirm with retail that produce is being stored and displayed correctly for optimal freshness.

2.

Insight:

One of the vegetables with the greatest seasonal fluctuations, affecting purchase and consumption.

Recommendation:

Increase purchase in colder months by providing recipe ideas that complement winter dishes, such as soup and pasta.

3.

Insight:

Apple cucumbers continue to improve in awareness.

Recommendation:

Ensure consumers know when and how to use Apple cucumbers by providing recipe prompts in-store. Consider tastings in-store to encourage greater purchase.

Eggplant Grower Action Plan

5.8/10

Eggplant holds low importance to consumers.

1.

Insight:

Incidence of eggplant purchase is low compared with the top 20 vegetables purchased.

Recommendation:

Engage consumers by providing them with more information about the vegetable. Consumers require confidence to try new vegetables. Provide cooking instructions, nutritional information and textural descriptions where possible.

2.

Insight:

There is an increase use of eggplant in Middle Eastern cuisine.

Recommendation:

Inspire greater purchase by providing recipe ideas in-store. Capture attention with creative displays, recipes on pack and taste descriptor and attributes that eggplant will bring to Middle Eastern dishes.

3.

Insight:

Awareness of eggplant varieties and types is very low.

Recommendation:

For retailers, make sure that eggplant is clearly, and correctly labelled. Consumers are interested in new varieties, but a basic knowledge of current varieties available is required first.

Zucchini Grower Action Plan

Freshness expectations are consistently met.

1.

Insight:

Convenience and ease of preparation are key triggers to purchase. Further, 40% of new product launches are microwavable.

Recommendation:

There is opportunity to innovate zucchini products in Australia, particularly in the pre-prepared meal space. Focus on convenient options for time poor consumers.

2.

Insight:

Zucchinis are purchased loose by nearly all consumers.

Recommendation:

To expand current reach, explore whether there is a market and need for additional zucchini formats, including pre-packed (cut/chopped) and frozen options.

3.

Insight:

Zucchini is typically used in Australian and Italian cuisine.

Recommendation:

Educate consumers on the versatility of zucchini, especially in French cuisine (had the greatest number of NPD launches). Recipes should highlight easy of cooking and focus on dinner meal occasions.

Fast Facts
(1 of 2)

Eggplant:

- Consumer sentiment is consistent with the previous wave. Eggplant holds strong levels of endorsement and future purchase intent.
- Purchase and consumption are up from August, with consumers eating eggplant on five occasions per month. Mainstream and specialist retailers were the main outlets for purchase.
- Consumers purchase 930g of eggplant per shop, which is in line with the previous month. Recalled last spend is $4.17 and overall is perceived as fair value for money.
- Pricing analysis revealed the national average price for purple eggplant was $6.77 per kilo in December, which is a considerable drop from August prices.
- Unprompted awareness of eggplant types remains low, with two thirds of consumers unable to recall a type.
- Key influences to purchase are using as an ingredient in dishes and adding variety to their vegetable selection. Key barriers to purchase are already consuming enough for their needs and price.
- Expected freshness was up this wave, with eggplant expected to remain fresh for over a week. This freshness was generally met.

Celery:

- Celery performs below average on the majority of category health and consumer sentiment measures. However, consumers indicate that they are satisfied with the range available.
- Celery was purchased 3.0 times per month and consumed on average 9.7 occasions per month. This is an increase on previous waves.
- Consumer prefer to purchase whole bunches of celery. Recalled last spend is $2.70 and this is perceived as good value for money, slightly down on Wave 15.
- Price tracking indicated the average price per bunch of celery in December was $2.74. Price has remained relatively stable over the previous three waves.
- Spontaneous awareness of celery types remains very low, with 81% of respondents unable to state a type.
- Top triggers to purchase are to use as an ingredient in dishes and health. Nearly half of consumers perceive that they consume enough for their needs.
- Consumers expect celery to remain fresh for over nine days, consistent with previous trends.

Fast Facts
(2 of 2)

Cucumber:

- Consumer sentiment and category health for cucumbers are in line with the Harvest average for all vegetables tracked. There was a high level of propensity to purchase in the future.
- Cucumber purchase and consumption are up on previous waves, most likely due to seasonal changes. Purchase is primarily made through mainstream retailers.
- Weight of purchase is down, with consumers on average purchasing 640g in December. Perceived value for money is on par with the previous month, overall considered good value.
- Pricing tracking of Lebanese cucumbers revealed a national average of $6.53 per kilo in December, considerably lower than in August 2014.
- Unprompted awareness of types and varieties of cucumbers is high. Lebanese and Continental types have the greatest recall. Trend towards increased awareness of Apple cucumbers.
- Cucumber is expected to stay fresh for a week and expectations were generally met.
- Key drivers of purchase are health and taste, consistent across waves. Barriers to purchase are short shelf life and the perception that consumers are eating enough for their needs.

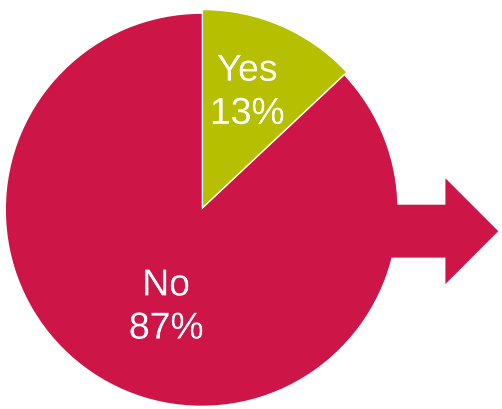
Zucchini:

- Zucchini consistently falls below the Harvest mean for perceived importance and future purchase intent. However, consumers indicate that they are satisfied with the current range available.
- Consumers' purchase and usage frequency trend upward in the current wave. Key retailers for zucchini purchase are Coles, Woolworths and specialist retailers.
- Weight of purchase has remained stable (700g). Perceived value for money noticeably increased this month, with zucchinis believed to be good value for money.
- The average price per kilo for zucchinis in December is $5.32m slightly lower than August prices ($5.77kg).
- Awareness of zucchini types remains very low, with three quarters of consumers unable to name a variety. Those who can are largely prompted by colour.
- Zucchini is expected to remain fresh for over a week, slightly down on previous months. However, expectations of freshness were likely to be met.
- Top triggers to purchase are ease of preparation, as an ingredient in dishes and adding variety. Consumers limit purchase of zucchini because they want variety in their diets.

Wave 19:
Ad-Hoc Questions

The majority of consumers have not purchased vegetables online. There are multiple barriers to online purchase, including scepticism on the freshness and quality of the vegetables. Consumers also like to select their own vegetables in-store so that they can see and touch before buying.

Purchased Vegetables Online



Reasons for Not Purchasing Vegetables Online

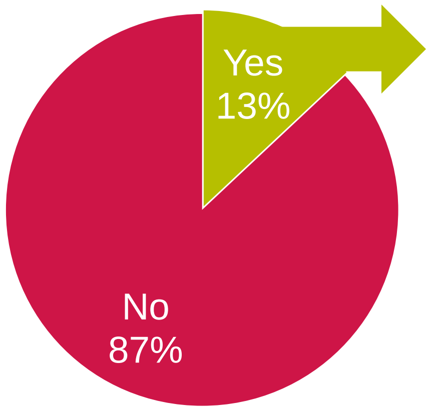
I'm worried about the freshness of the vegetable selection from the store. I think that they may give me the older stock."

I prefer to buy vegetables that I can touch, smell and look at so I can make my own choice."

AHQ1. Have you ever purchased vegetables online? Why?
Word Cloud= the larger the word, the more times it was mentioned by respondents
N=696

One in eight consumers have bought vegetables online and convenience is the key driver for online purchase. Consumers perceive that through online purchase they are supporting Aussie farmers.

Purchased Vegetables Online



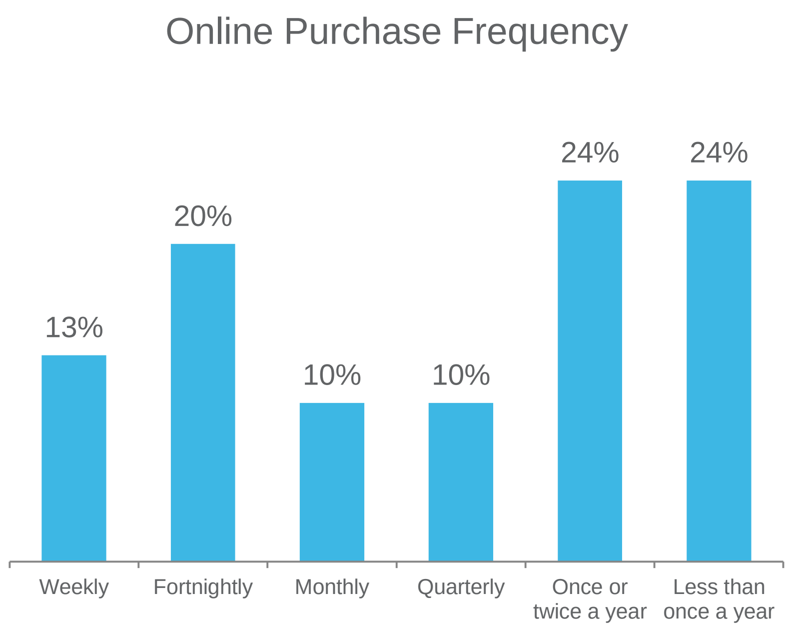
Reasons for Purchasing Vegetables Online

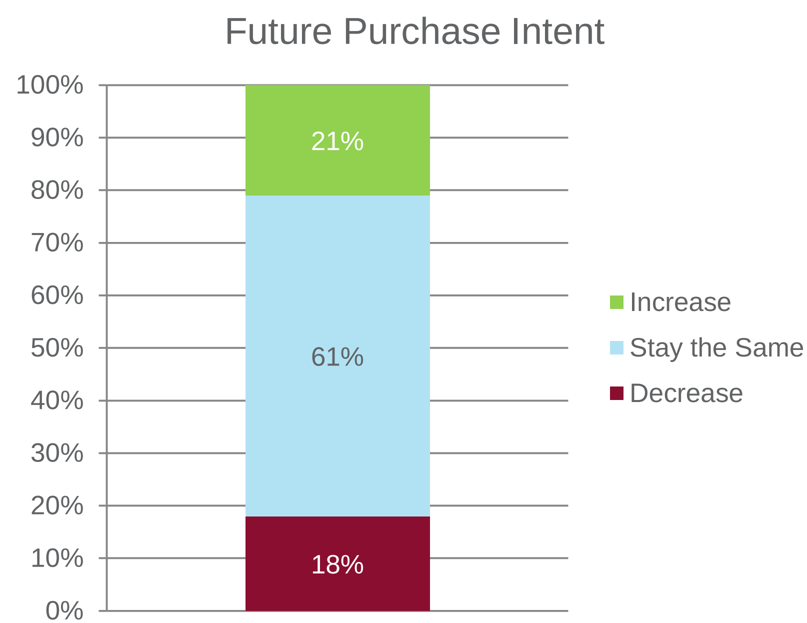
Support Aussie farmers and convenient, good quality."

Convenience and straight from farmers direct- so freshness."

AHQ1. Have you ever purchased vegetables online? Why?
Word Cloud= the larger the word, the more times it was mentioned by respondents
N=696

A third of consumers purchase their vegetables online as part of their regular shop (weekly- fortnightly), whilst the majority use online vegetable shopping irregularly. Online vegetable purchase looks to remain relatively stable in the future.



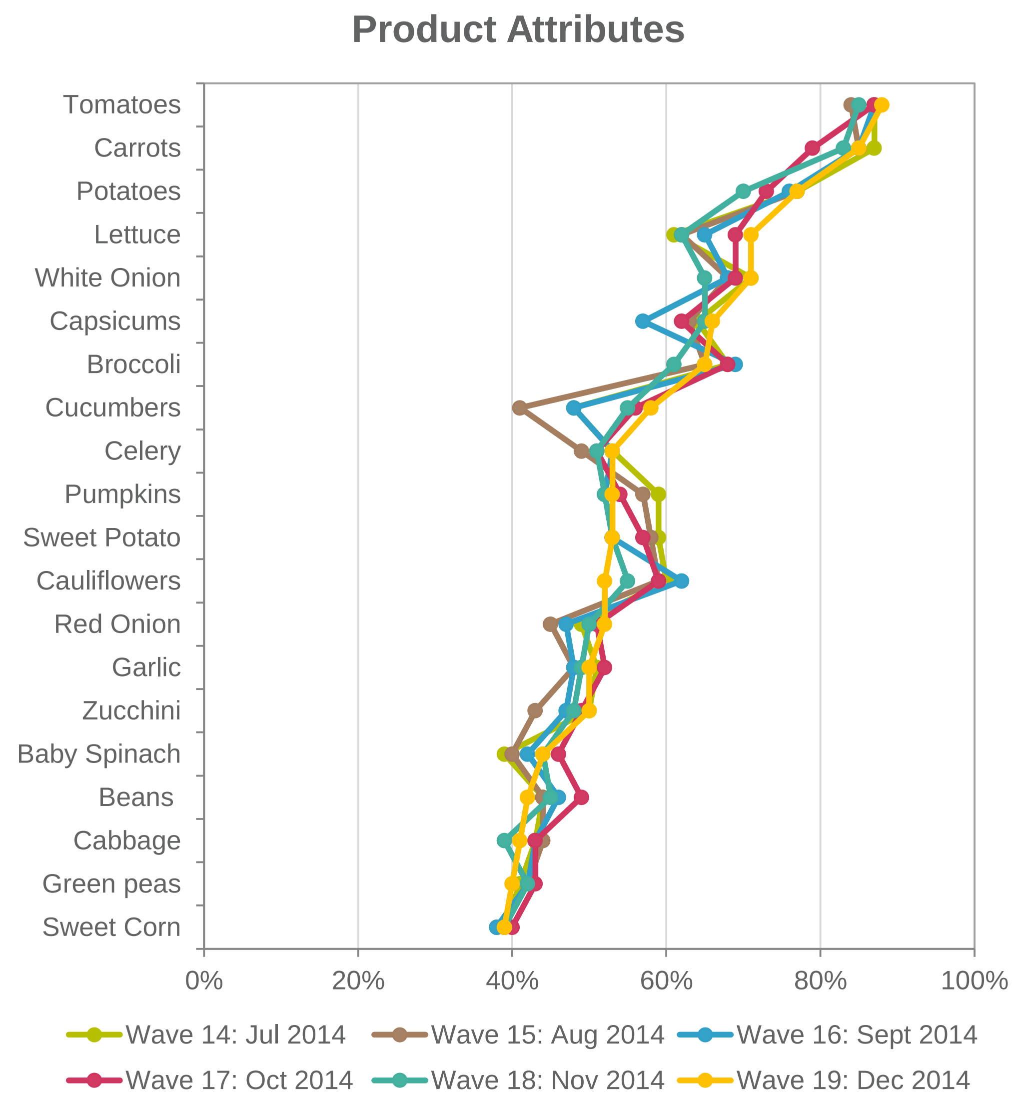


AHW19Q2a On average, how often do you purchase vegetables online?
AHW19Q2b In the future are you likely to purchase vegetables online?
N=696

Wave 19: Overall Vegetable Tracking

Vegetables Purchased Last Month

- Tomatoes, carrots, potatoes, lettuce and onion are the most purchased vegetables in December 2014.
- Overall, vegetable purchase is on trend with previous months. Purchase of salad vegetables was slightly higher which is most likely due to the warmer weather.



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**?

Compared with the Harvest average, stated importance of this month's vegetables is relatively low.

In addition, Eggplant and Cucumber are the only vegetables to meet future purchase intent benchmarks.

Change in seasons and warmer weather can impact the perceptions of freshness, and in turn influence consumer satisfaction and endorsement.

	Eggplant	Celery	Cucumber	Zucchini	Harvest Total Mean
Importance	5.8	5.5	6.3	6.0	6.2
Satisfaction	6.3	6.7	6.6	6.6	6.6
Endorsement	6.9	6.3	6.7	6.7	6.8
Interest (New Types)	6.3	5.3	5.8	5.9	6.1
Future Purchase					
More	21%	9%	15%	10%	14%
Same	74%	88%	83%	89%	84%
Less	4%	3%	2%	2%	2%

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

Celery.

Consumers purchase celery three times per month. Celery is consumed on average 9.7 times per month, holding gains made over Wave 11.

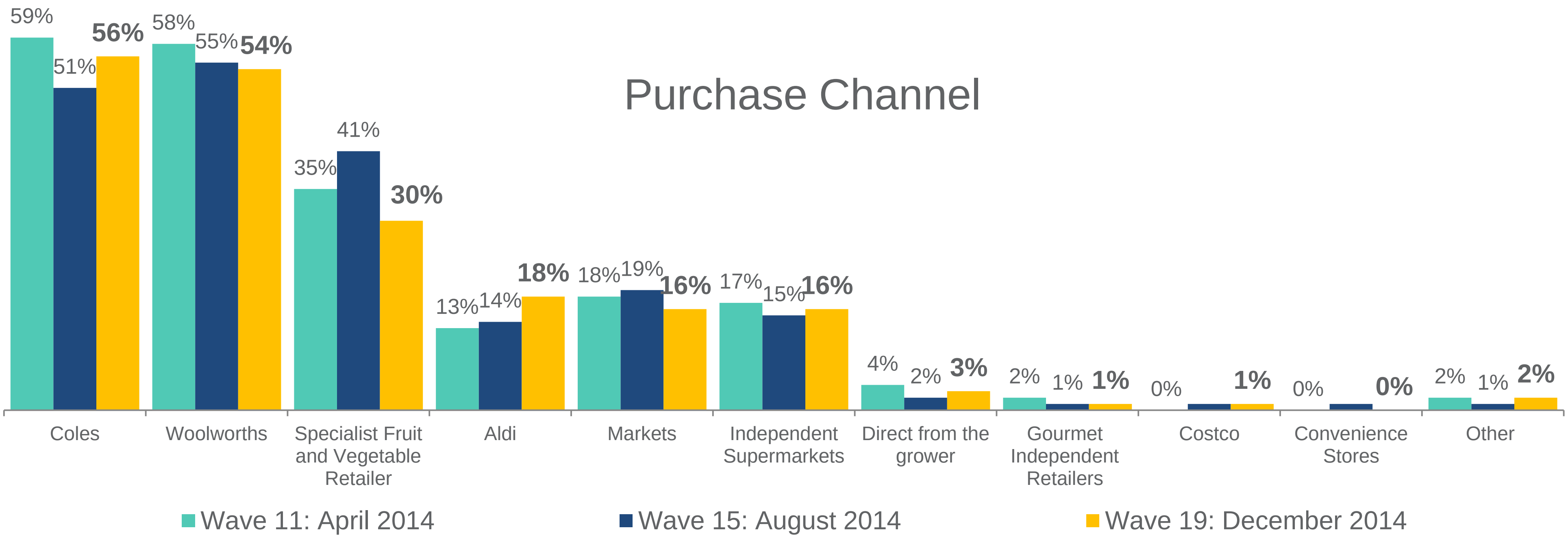
Purchase from mainstream retailer Coles has increased, taking top spot from Woolworths. Specialist retailers declined sharply this wave whilst purchase from Aldi is showing consistent upward growth.

Average Purchase **3.0** times per month

▼ 2.5 times, Wave 11
▼ 2.9 times, Wave 15

Average Consumption **9.7** times per month

▼ 7.7 times, Wave 11
▼ 9.4 times, Wave 15



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 11 N=304, Wave 15 N=334 & Wave 19 N=358

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

Average Spend and Price Sensitivity

Average weight of purchase

The average consumer typically purchased **800g** of Celery in December 2014, which was lower than the previous wave but in line with Wave 11.

- 800g, Wave 11
- ▲ 900g, Wave 15

Recalled last spend

The average recalled last spend on Celery was **$2.70**, experiencing a small decline since the previous wave.

- ▼ $2.50, Wave 11
- ▲ $2.80, Wave 15

Value for money

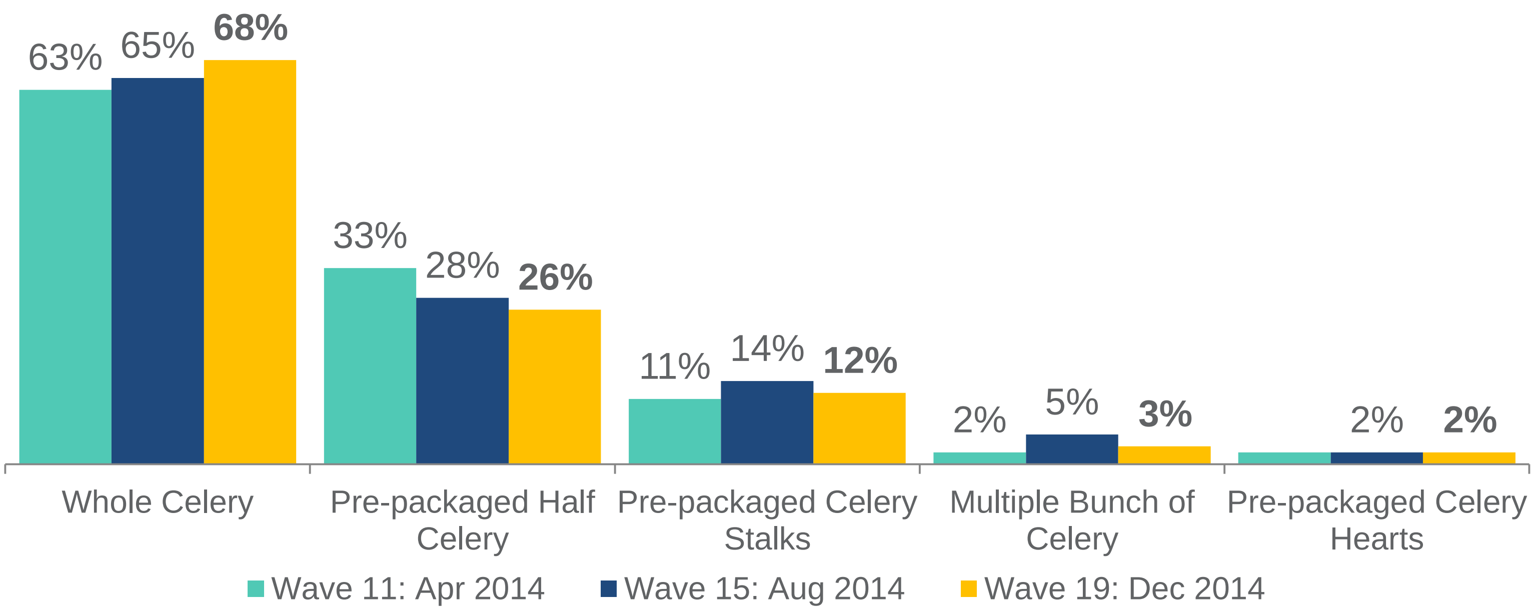
On average, consumers perceived Celery to be good value for money **(6.3/10)**, which declined from the previous wave but remains above Wave 11.

- ▼ 6.2/10, Wave 11
- ▲ 6.6/10, Wave 15

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 11 N=304, Wave 15 N=334 & Wave 19 N=358

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

There is a trend towards purchase of whole celery, with a decline in half formats. On average consumers purchase one unit per shop.

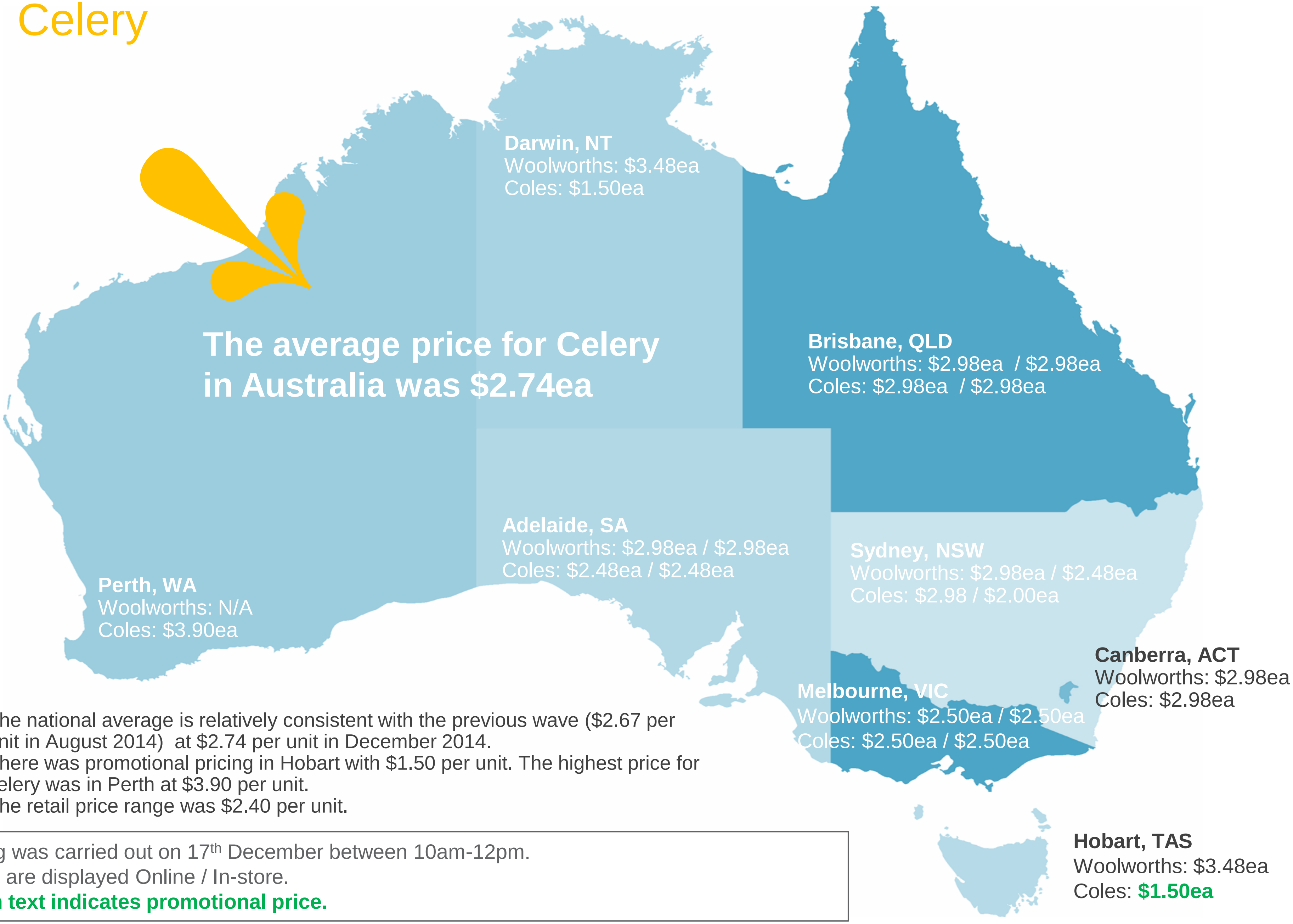


	Whole Bunch	Half Bunch	Pre-packed Stalks	Multi-bunch	Celery Hearts
Wave 11	1.1	1.1	1.5	1.9	1.5
Wave 15	1.3	1.3	2.6	1.9	2.6
Wave 19	1.1	1.1	1.7	1.2	1.7

Q3a. How much <commodity> does this typically equate to?
Sample Wave 11 N=304, Wave 15 N=334 & Wave 19 N=358

Online and In-store Commodity Prices

Celery



- The national average is relatively consistent with the previous wave ($2.67 per unit in August 2014) at $2.74 per unit in December 2014.
- There was promotional pricing in Hobart with $1.50 per unit. The highest price for celery was in Perth at $3.90 per unit.
- The retail price range was $2.40 per unit.

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

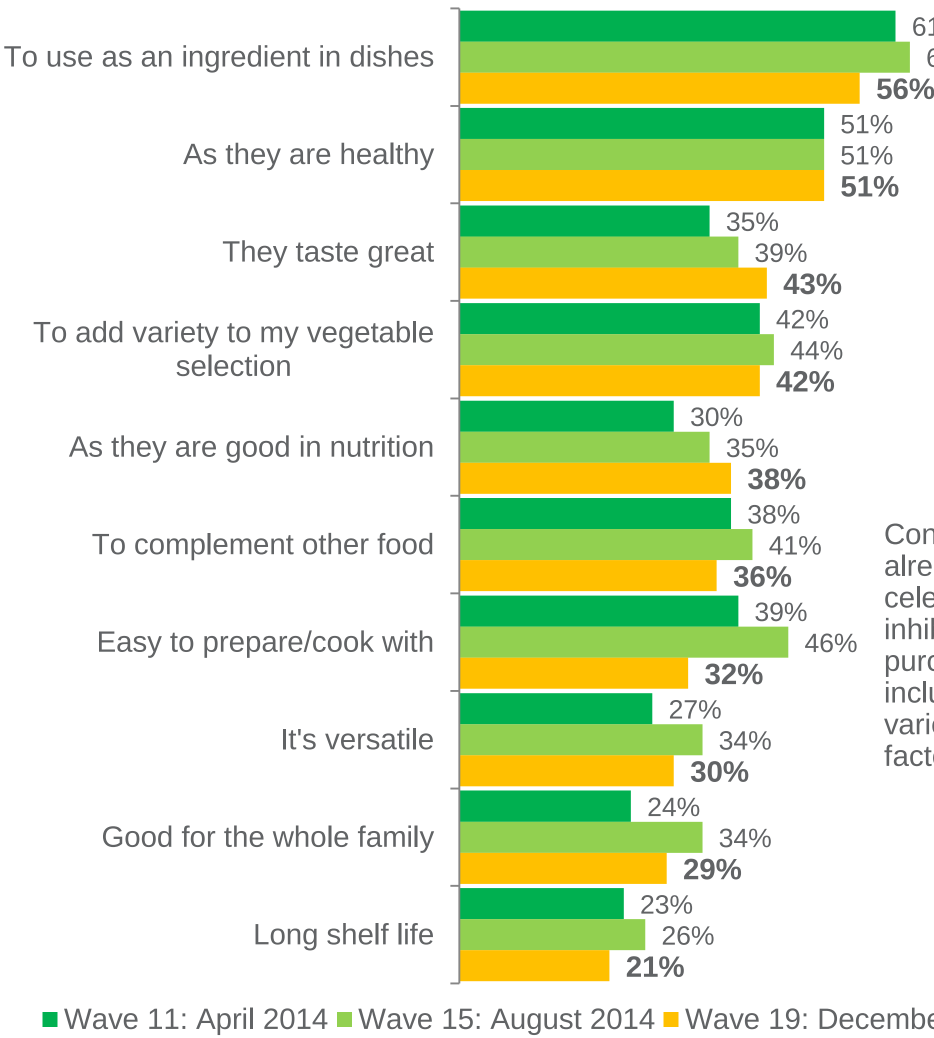
Spontaneous Awareness of celery varieties remained very low, with 81% of consumers unable to recall a type, although this a slight increase over the previous wave.

- Respondents who stated a type of celery recalled the ‘normal’ one, ‘green’ and ‘stringless’ types.

Sample Wave 11 N=304, Wave 15 N=334 & Wave 19 N=358
Q6a. What varieties of <commodity> are you aware of? (unprompted)

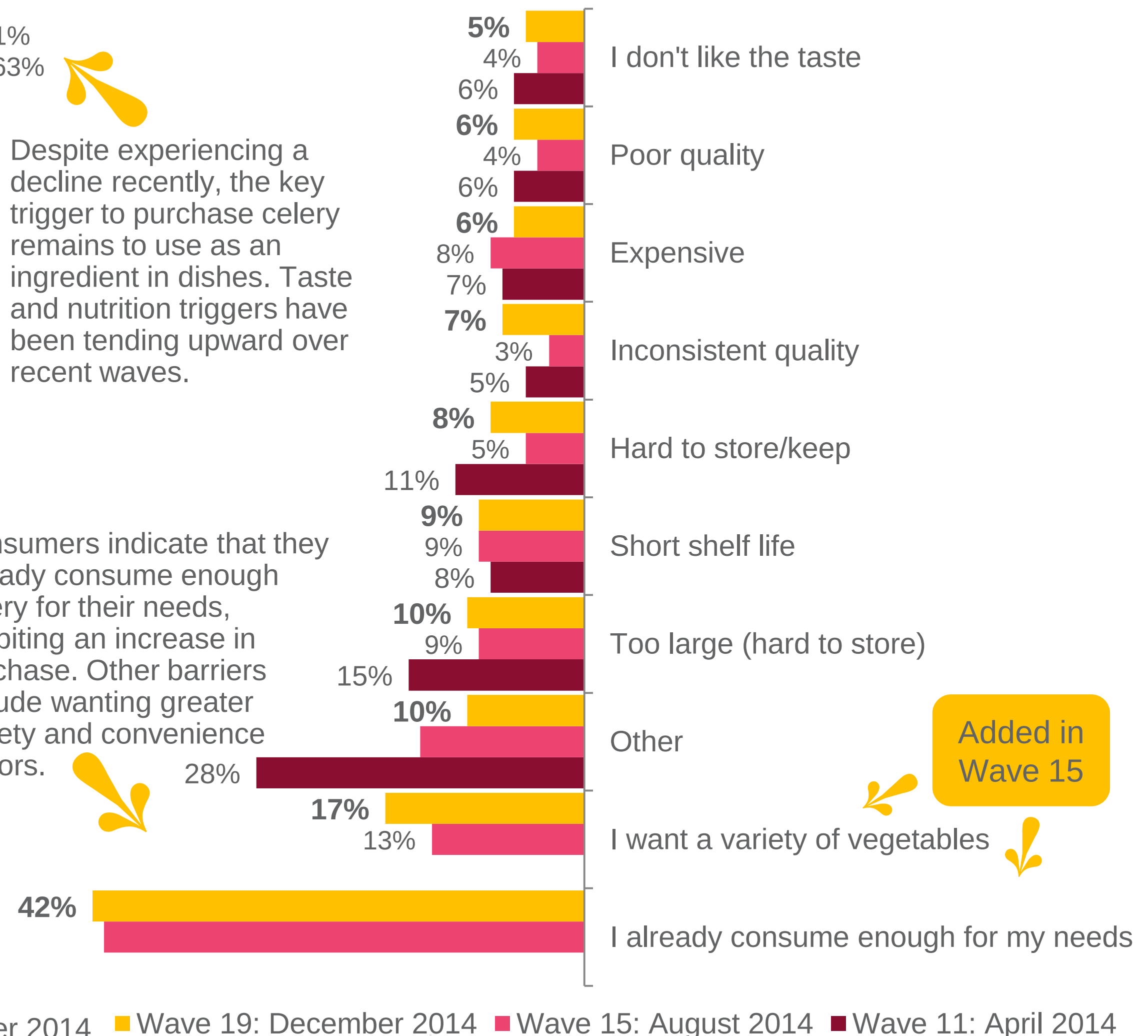
Triggers & Barriers to Purchase

Triggers



Despite experiencing a decline recently, the key trigger to purchase celery remains to use as an ingredient in dishes. Taste and nutrition triggers have been tending upward over recent waves.

Barriers



Consumers indicate that they already consume enough celery for their needs, inhibiting an increase in purchase. Other barriers include wanting greater variety and convenience factors.

Sample Wave 11 N=304, Wave 15 N=334 & Wave 19 N=358

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?

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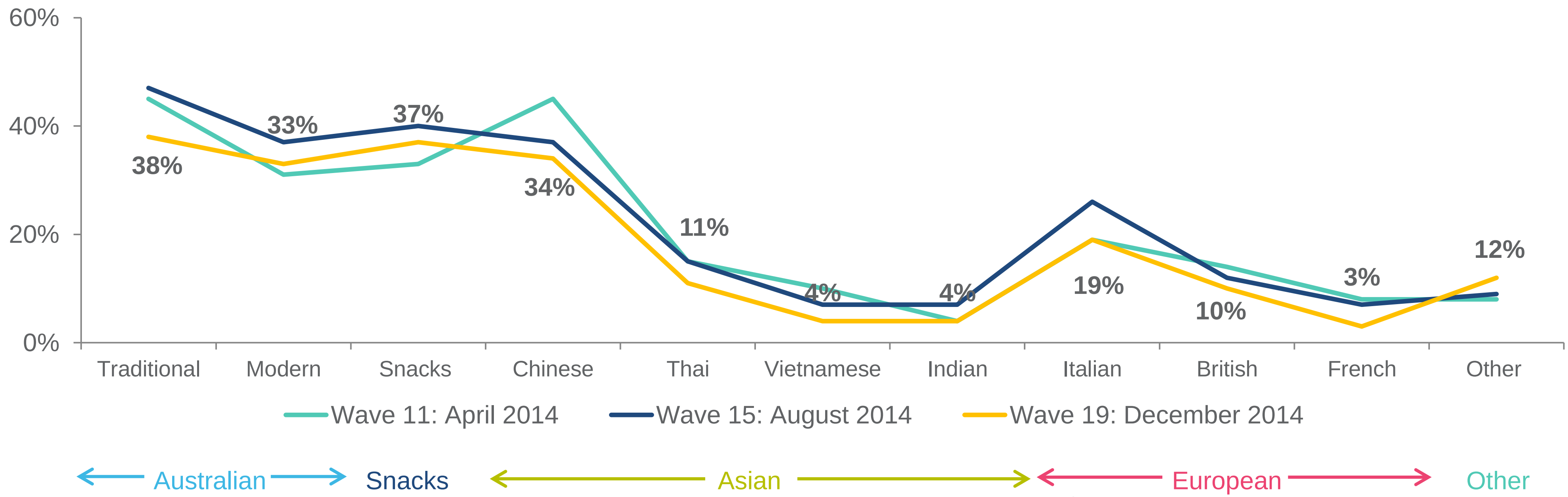
Despite experiencing notable declines over the previous wave, Australian cuisine remains the most popular choice for cooking celery. Snacks and Chinese cuisine are also frequently cooked/prepared.

Weekday dinner and family meals are the main celery consumption occasions.

Wave 19 Top 5 Consumption Occasions

	Wave 19	Wave 15	Wave 11
Weekday Dinner	**41%**	42% ▲	41% –
Family meals	**32%**	39% ▲	35% ▲
Every-day meals	**30%**	34% ▲	25% ▼
Quick Meals	**28%**	33% ▲	28% –
Weekend Dinner	**25%**	29% ▲	24% ▼

Typical Cuisine Cooked



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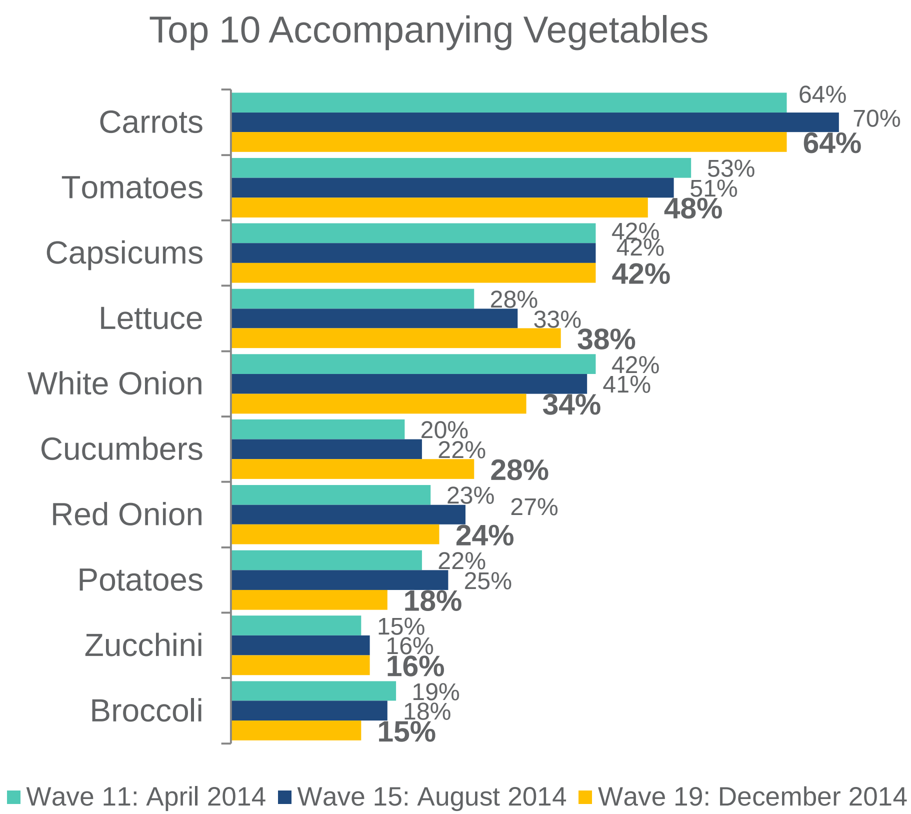
Sample Wave 11 N=304, Wave 15 N=334 & Wave 19 N=358
Q10. What cuisines do you cook/consume that use <commodity> ?
Q11. Which of the following occasions do you typically consume/use <commodity> ?

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

Celery is generally served with carrots, tomatoes and capsicums. Tomatoes continued to decline while lettuce experienced a solid upward trend as an accompanying vegetable.

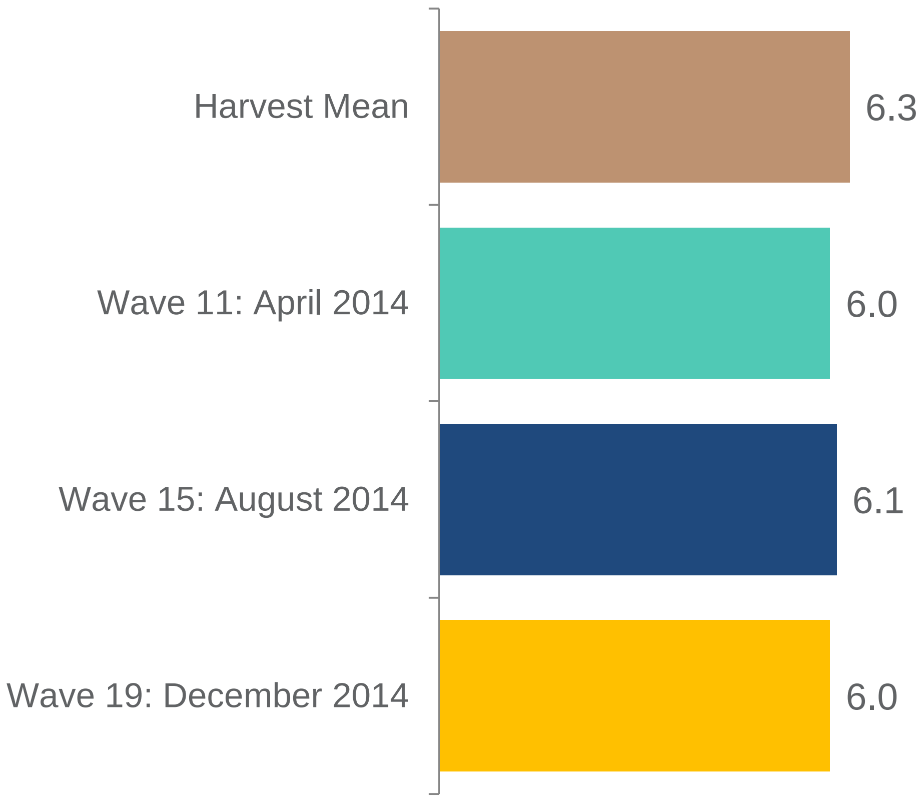
Cooking styles have experienced strong seasonal influences with over two thirds of consumers eating celery raw, while soups declined.



Top Cooking Styles			
	Wave 11	Wave 15	Wave 19
Raw	58%	60%	68%
Stir frying	52%	52%	47%
Soup	46%	56%	35%
Stewing	26%	37%	25%
Sautéing	10%	14%	11%
Shallow Frying	4%	6%	7%
Other	8%	6%	7%
Boiling	9%	6%	6%
Steaming	12%	10%	6%
Blend	4%	5%	6%

Sample Wave 11 N=304, Wave 15 N=334 & Wave 19 N=358
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?

Wave 19 saw importance of provenance drop to levels seen in Wave 11, breaking the upward trend previously experienced.



Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 11 N=304, Wave 15 N=334 & Wave 19 N=358

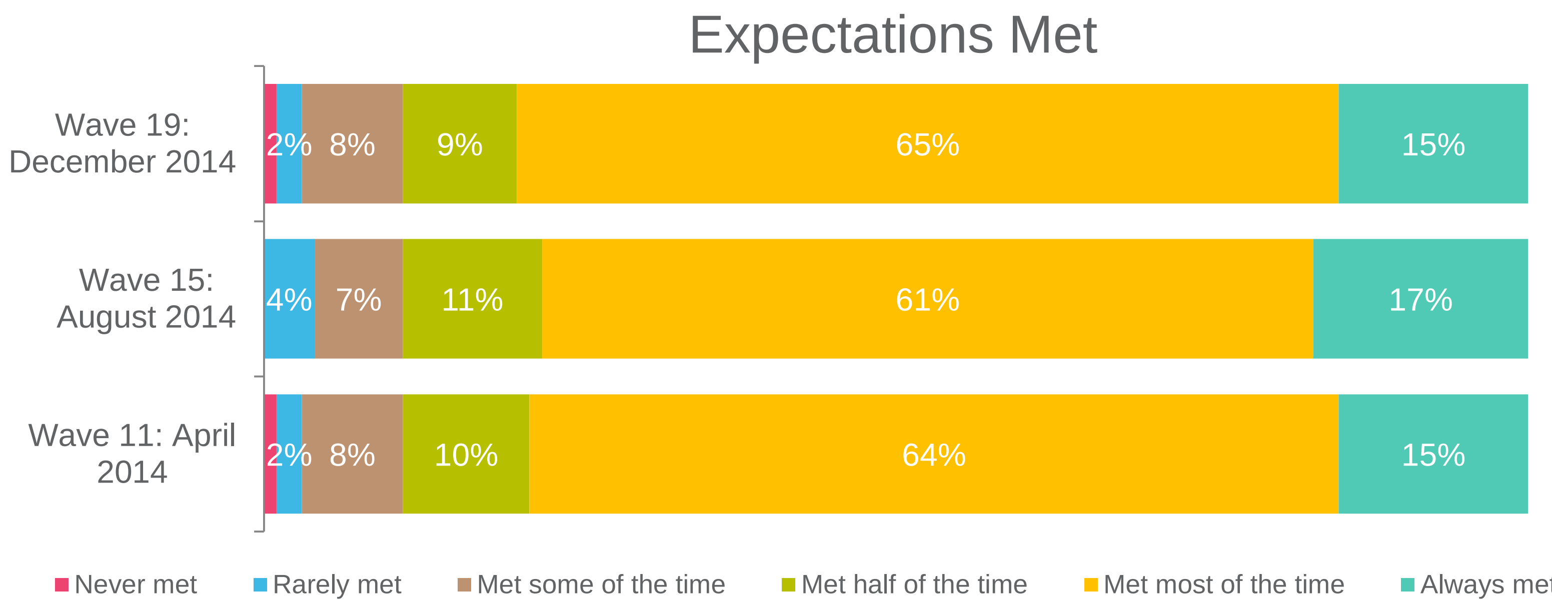
Consumers expect celery to remain fresh for over a week once purchased, which is slightly below the previous wave, but in line with Wave 11.

Expectations of freshness are generally met most of the time, which has seen an improvement over previous waves.

Expected to stay fresh for **9.5** days

9.5 days, Wave 11

▲ 9.7 days, Wave 15



Sample Wave 11 N=304, Wave 15 N=334 & Wave 19 N=358
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.

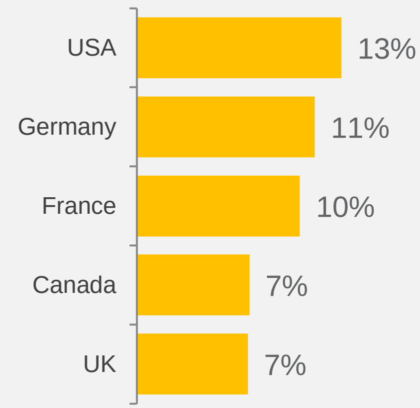
Trends:
Celery

Celery Global NPDs

October – December 2014

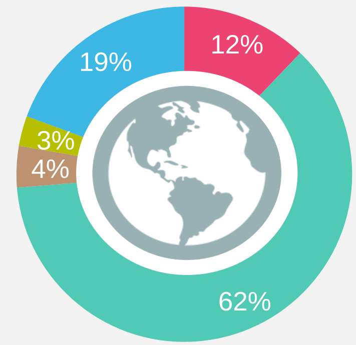
There were 1104 products containing celery launches in the past three months. Launches primarily occurred in Europe, in particular Germany and France. Categories for launch were meals, sauces and processed products.

Country

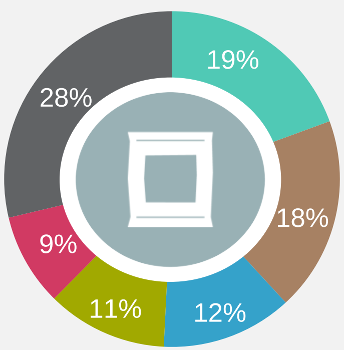


1104 Global Launches

Region



Top Pack Formats



Categories

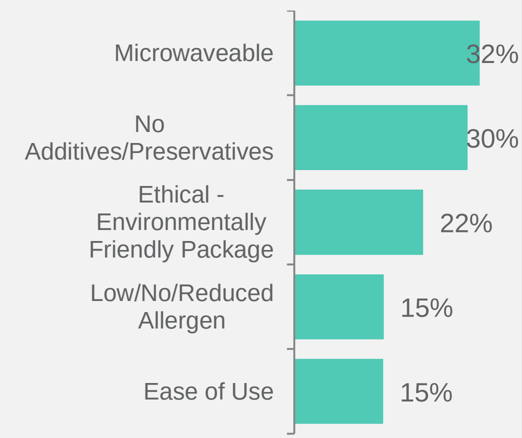
Meals 23%

Sauces 18%

Processed Products 16%

Soup 16%

Top Claims



Celery Product Launches:
Last 3 Months (October – December 2014)

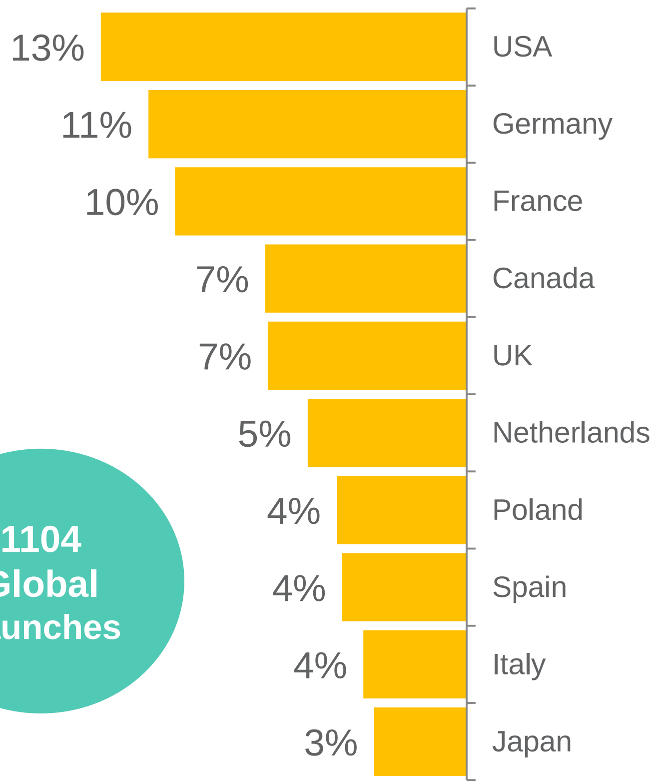
- Consistent with previous trends, a large number of products (N=1104) containing celery as an ingredient were launched globally in the last three months.
- There were 17 products launched in Australia, which was slightly more than the previous wave. Products ranged from stock to ready to eat meals.
- The majority of launches occurred in Europe (62%). However, the key country for launch the USA (13%), followed by Germany (11%) and France (10%).
- Trays (19%) and flexible packaging (18%) remain the most common pack format used over the last three months.
- Meals (23%), sauces and seasoning (18%) and processed products (16%) are the main categories for launches.
- Core claims used were microwavable (32%) and no additives/preservatives (30%).
- Examples of the most innovative launches can be found on the following pages.

Source: Mintel (2014)

Celery Launches

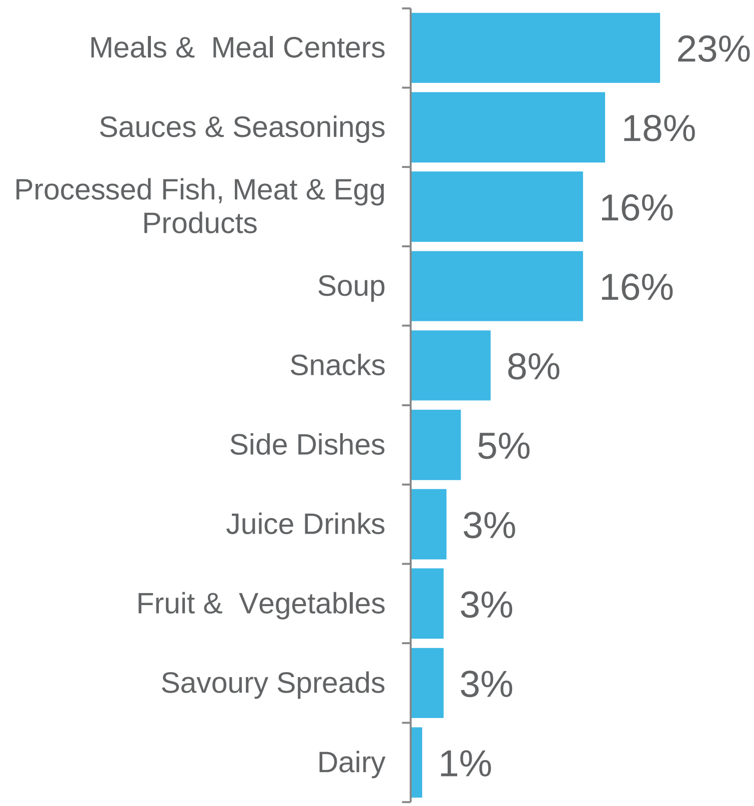
- USA and Germany remained the main countries for celery launches in the last three months.
- Again, meals were the main category for celery product launches.

Top Launch Countries



1104 Global Launches

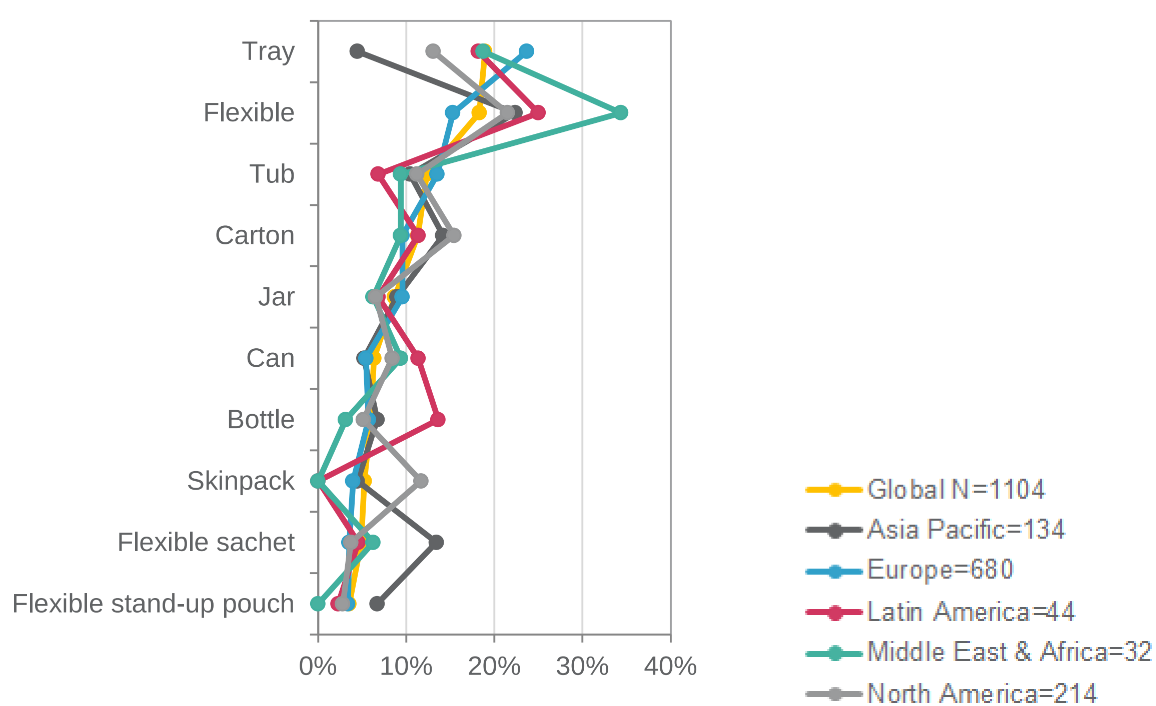
Top Launch Categories



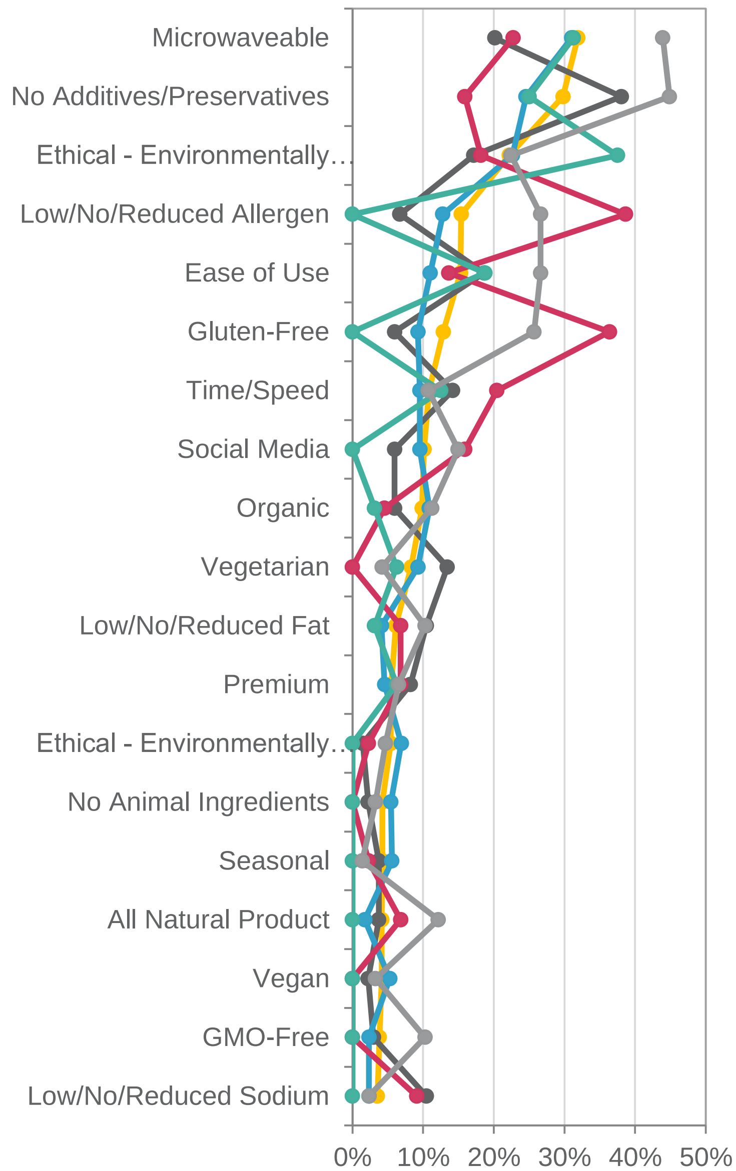
Celery Launches

- Tray packaging was the most popular pack format used, particularly in Europe.
- Microwavable and no additives/preservatives claims were key claims utilised over the past three months. North America were more likely to associate their products with both of these claims.

Pack Formats Launched



Top Claims Launched



Innovative Celery Launches:
L3M (October – December 2014)

Harry & David Zesty Tomato Drink Mix (USA)

Harry & David Zesty Tomato Drink Mix contains 73% juice and is said to add a fresh and lively twist to a classic bloody Mary cocktail. It is made with real vegetable juice and natural flavorings and is especially designed for use in featured cocktail recipes and is equally delicious served over ice for a non-alcoholic version.

Claims:
Seasonal

Tyson Ready for Slow Cooker Beef Roast with Vegetables (USA)

Tyson Ready for Slow Cooker Beef Roast with Vegetables and Complimentary Seasoning Kit has been relaunched with a new brand name, previously available under the Tyson Slow Cooker Creations brand. The ready to cook product comprises boneless beef chuck roast, red potatoes, carrots, yellow onions, celery and a complimentary seasoning packet.

Claims:
Ease of Use

Philadelphia Original Cream Cheese with Garlic & Herbs (Denmark)

Philadelphia Blødt Friskostprodukt med Hvidløg & Urter (Original Cream Cheese with Garlic & Herbs) has been repackaged with a new design. This product contains 11% fat, is free from preservatives and retails in a 200g pack.

Claims:
No Additives/Preservatives

Robertsons Spice for Rice (Nigeria)

Robertsons Spice for Rice is halal and kosher certified. This product is great for making rice or rice salad, and retails in a 7g pack.

Claims:
Halal, Kosher

Source: Mintel (2014)

Innovative Celery Launches:
L3M (October – December 2014)

KTC Original Chicken Fry Mix (UK)

KTC Original Chicken Fry Mix has been repackaged. The product contains a specially selected blend of spices and retails in a 300g pack.

Claims:
No information available

Yumi Spanking Drink (France)

Yumi La Fessée (Spanking Drink) contains spinach, broccoli, parsley, green cabbage, lime, ginger, celeriac, pear, and asparagus. This product has been cold extracted to get more nutrients, and has been made with the HPP technology to preserve vitamins, nutrients and flavours.

Claims:
No Additives/Preservatives, Other (Functional), Antioxidant

Selection Monique Ranou Burgundy Style Burgundy Snails (France)

Selection Monique Ranou Escargots de Bourgogne (Burgundy Recipe Burgundy Snails) have been relaunched in a newly designed pack and with a new name, having previously been available under the Claude Léger brand name. This product can be oven heated in 10 to 12 minutes and retails in a 202g pack containing 36 medium size units.

Claims:
Seasonal, Ethical - Environmentally Friendly Package

Biolab Organic Soy Bolognese Ragù Sauce (France)

Biolab Veg-Ragù di Soja alla Bolognese (Organic Soy Bolognese Ragù Sauce) has been repackaged with a new design. This ready-to-heat and -serve product is suitable for vegetarians and vegans and can be prepared in two minutes. It retails in a 250g pack, which is sufficient for two servings and featuring the AB Organic certification and the EU Leaf logos.

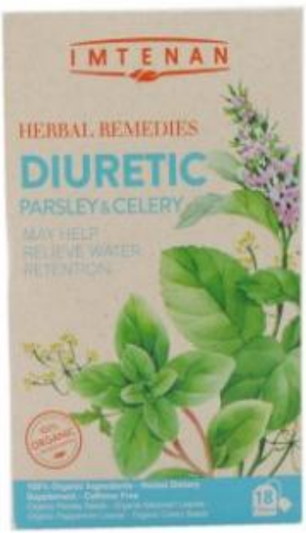
Claims:
Ease of Use, Organic, Vegan, Vegetarian, No Animal Ingredients

Source: Mintel (2014)

Innovative Celery Launches:
L3M (October – December 2014)

Imtenan Herbal Remedies Diuretic Parsley & Celery Herbal Tea (Egypt)

Imtenan Herbal Remedies Diuretic Parsley & Celery Herbal Tea is made with 100% organic ingredients. This herbal drink helps to relieve temporary water retention and flush body toxins. It also helps to sustain vitality during diet programs. This caffeine-free product retails in a recycled and recyclable pack containing 18 filters.



Claims:

Organic, Other (Functional), Ethical - Environmentally Friendly Package, Digestive (Functional), Caffeine Free

Kotányi Seasoning Mix for Game (Hungary)

Kotányi Vadpác Füszerkeverék (Seasoning Mix for Game) has been repackaged in a newly designed pack. The premium quality product contains 0% salt and retails in an easy-open 25g pack.

Claims:

Convenient Packaging, Low/No/Reduced Sodium, Premium

I-Mei Mushroom & Vegetable Flavoured Fish Balls (Taiwan)

I-Mei Mushroom & Vegetable Flavoured Fish Balls have been relaunched with a newly designed pack and a new formulation. The product is made with selected fish paste, Taiwanese mushrooms and vegetables. It is free from preservatives and MSG, and retails in a 430g pack.

Claims:

No Additives/Preservatives

Deshome Aloe Vera Paste (Taiwan)

Deshome Aloe Vera Paste contains aloe pulp, and is said to be ideal for noodles, rice and vegetable dishes. The vegan product is free from preservatives and retails in a 180g pack.

Claims:

No Additives/Preservatives, Vegan, Vegetarian, Ethical - Environmentally Friendly Package, No Animal Ingredients

Source: Mintel (2014)

Australian Celery Launches:
L3M (October – December 2014)

Jamie Oliver Keep It Simple Slow Cooked Lentils

Claims:
Wholegrain, Vegetarian, Microwaveable

Oktoberfest German Style Celery Salad

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

John West Italian Style Tuna Pasta Salad

Claims:
Ease of Use, On-the-Go, Ethical - Animal

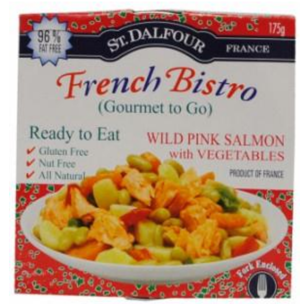
Woolworths Select Winter Vegetables Soup

Claims:
Ease of Use, No Additives/Preservatives, Seasonal, Low/No/Reduced Fat, Microwaveable

Five Tastes Nasi Goreng Meal Kit

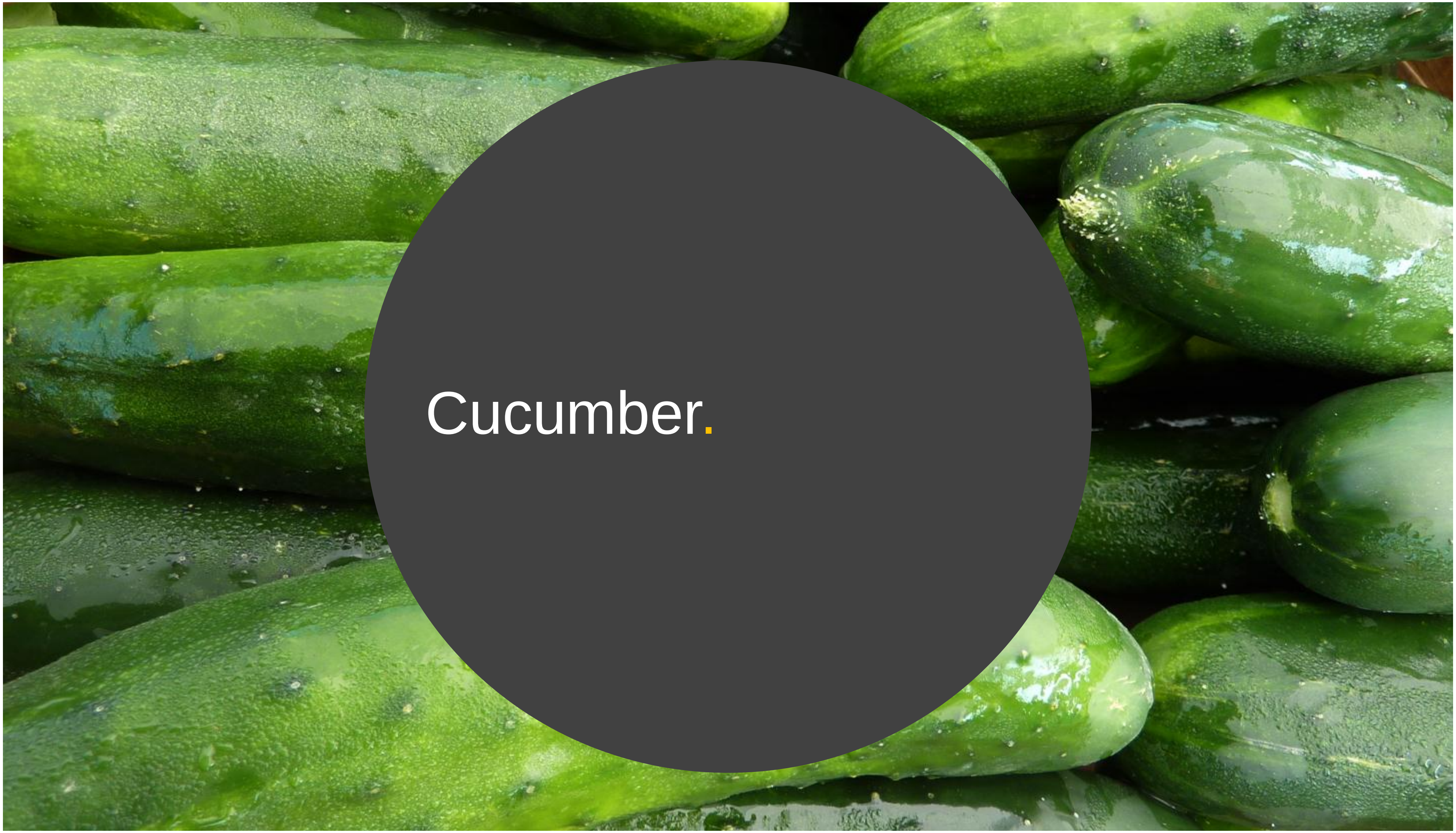
Claims:
Ease of Use, No Additives/Preservatives, Social Media

St. Dalfour French Bistro (Gourmet to Go) Ready to Eat



Claims:
No Additives/Preservatives, All Natural Product, Low/No/Reduced Allergen, On-the-Go, Low/No/Reduced Fat, Time/Speed, Microwaveable, Ease of Use, Gluten-Free, Ethical - Animal

Source: Mintel (2014)



Cucumber.

Purchase frequency of cucumbers has risen above the stable levels observed in the past two waves. Consumption frequency has also risen, with a notable increase over the previous two waves.

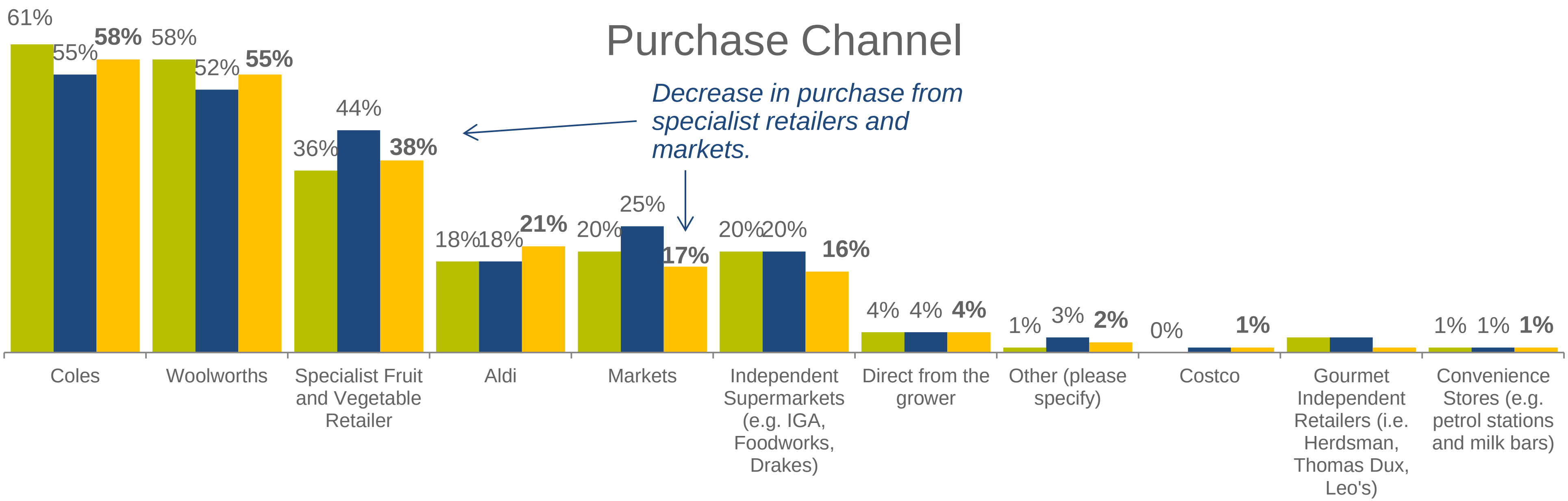
Coles and Woolworths are the key purchase locations for cucumbers. After increases in Wave 15, both Specialist Fruit and Veg retailers and Markets saw a decrease in purchase frequency in the latest Wave.

Average Purchase **4.8 times** per month

▼ 4.3 times, Wave 11
▼ 4.3 times, Wave 15

Average Consumption **13.1 times** per month

▼ 12.6 times, Wave 11
▼ 12.2 times, Wave 15



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 11, N=301, Wave 15, N=337 and Wave 19 N=359

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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 **640g** of Cucumber in December 2014, which was a sharp decline over Wave 15.

▼ 600g, Wave 11
▲ 760g, Wave 15

Recalled last spend

The average recalled last spend was **$2.90**, which was lower than the previous wave, yet remains above Wave 11.

▼ $2.50, Wave 11
▲ $3.30, Wave 15

Value for money

On average, consumers perceived Cucumber to be good value for money **(6.2/10)**, which was a slight decline from last wave.

— 6.2/10, Wave 11
▲ 6.1/10, Wave 15

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 11, N=301, Wave 15, N=337 and Wave 19 N=359

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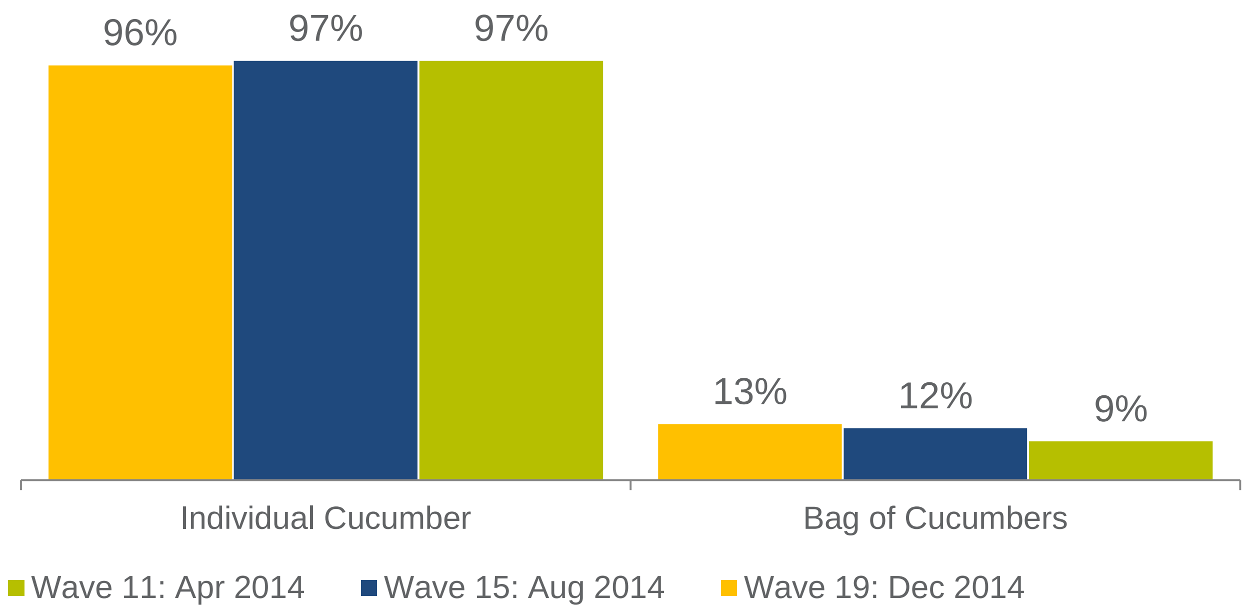
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Individual cucumbers remain the dominant format purchased. There is a trend towards increased number of cucumbers purchased per shop, on average 2-3.



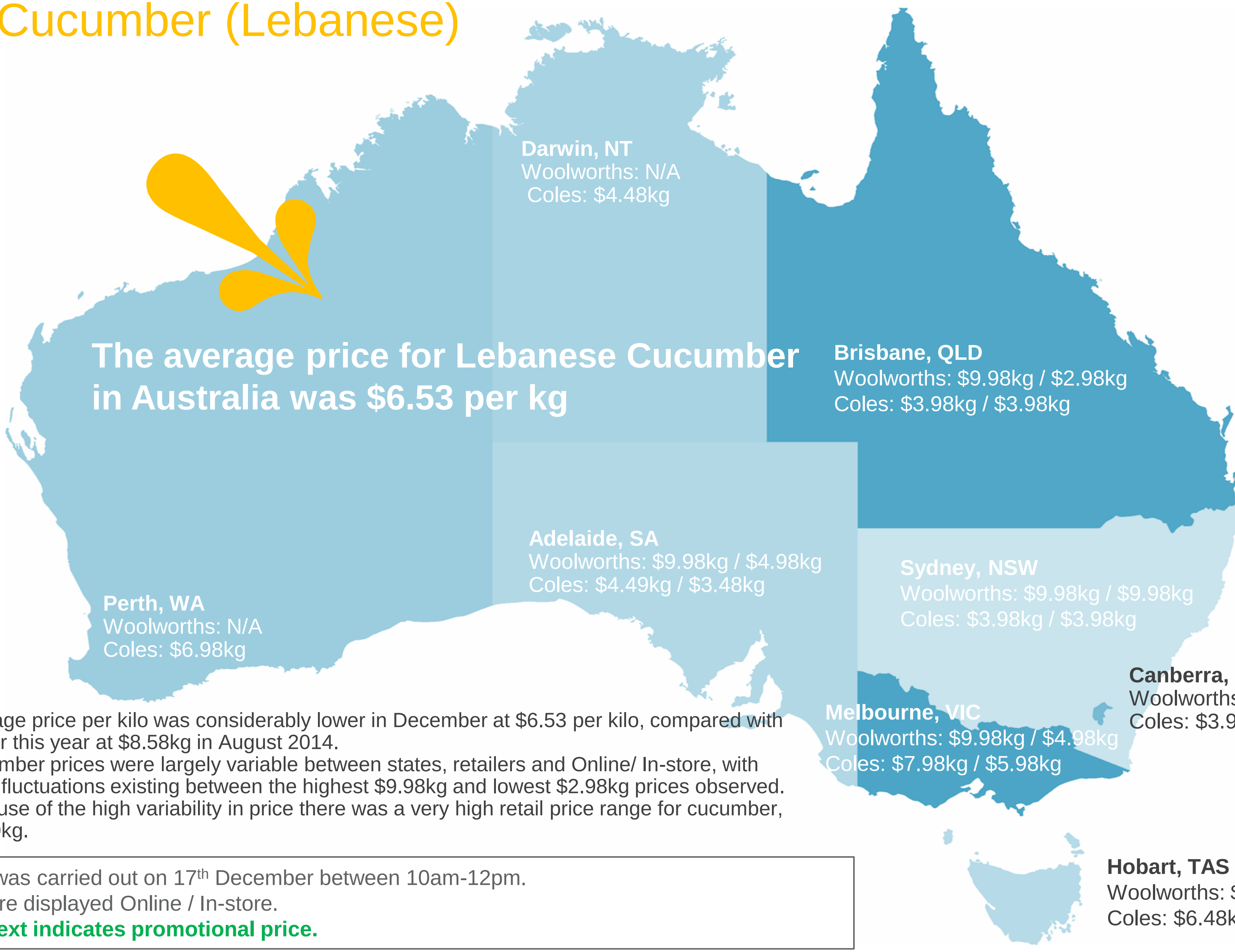
	Individual	Bag
Wave 11	2.2	2.5
Wave 15	2.5	2.2
Wave 19	2.6	2.2

Q3a. How much <commodity> does this typically equate to?
Sample Wave 11, N=301, Wave 15, N=337 and Wave 19 N=359

Online and In-store Commodity Prices

Cucumber (Lebanese)

The average price for Lebanese Cucumber in Australia was $6.53 per kg

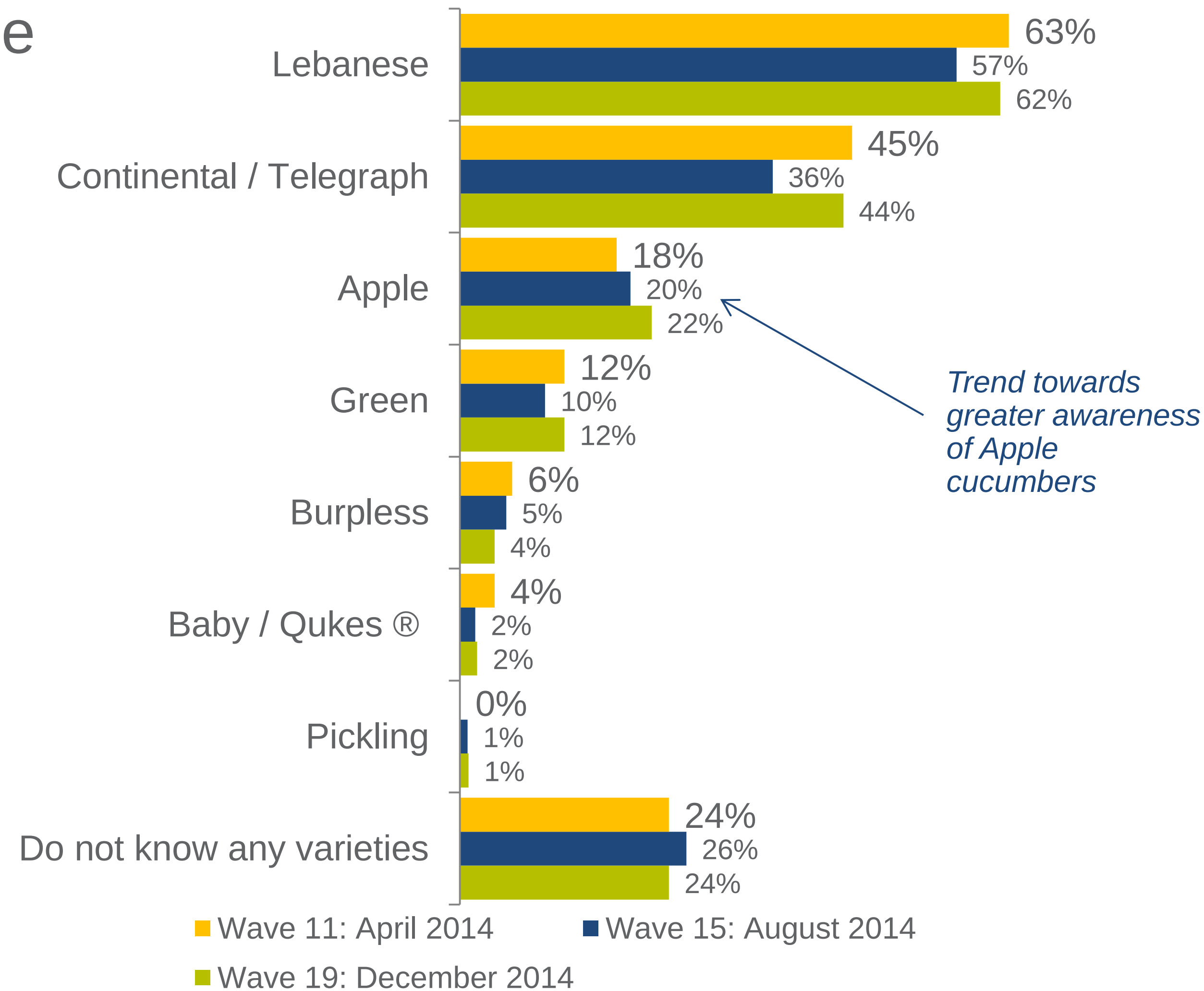


- Average price per kilo was considerably lower in December at $6.53 per kilo, compared with earlier this year at $8.58kg in August 2014.
- Cucumber prices were largely variable between states, retailers and Online/ In-store, with large fluctuations existing between the highest $9.98kg and lowest $2.98kg prices observed.
- Because of the high variability in price there was a very high retail price range for cucumber, $7.00kg.

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

Spontaneous awareness of cucumbers was in line with April 2014, after a decline in August.

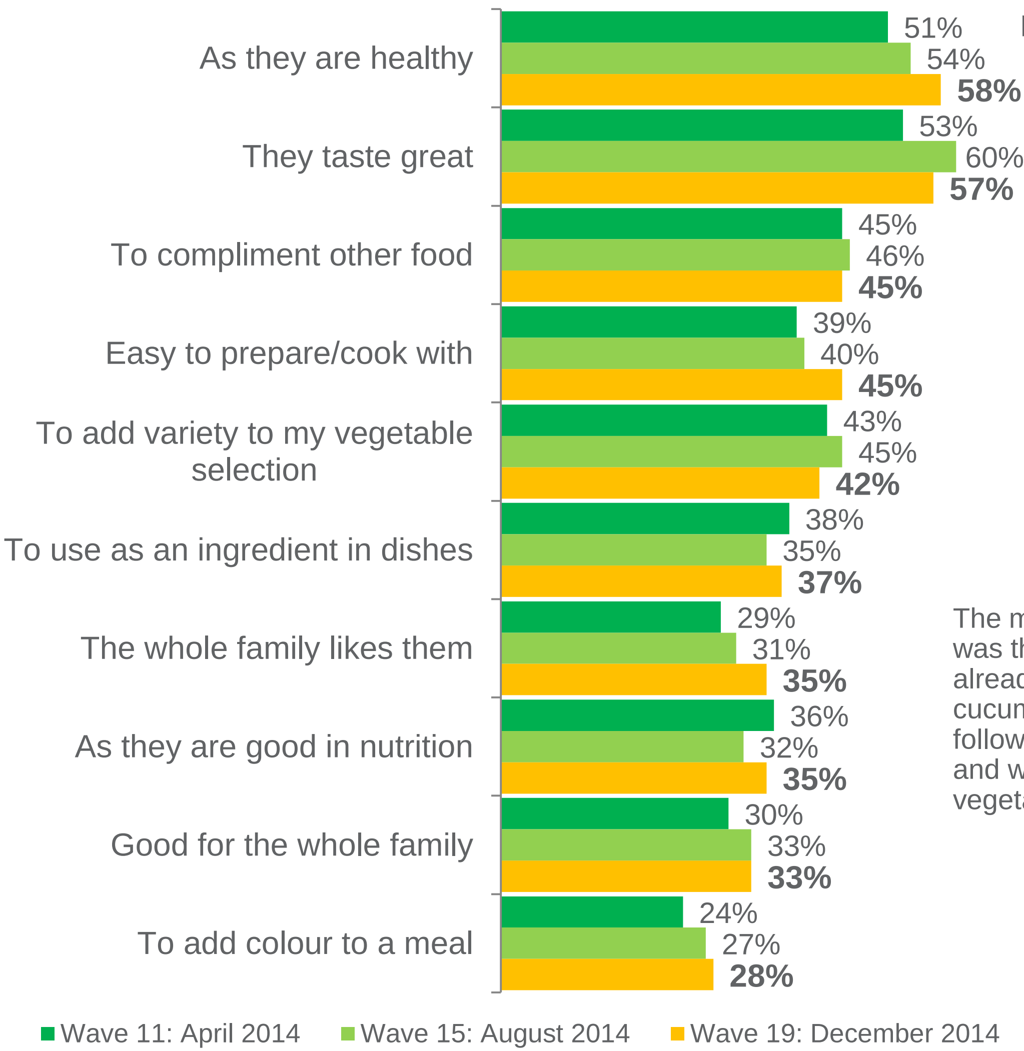
Lebanese and Continental/Telegraph continue to have strong recall. However, a quarter of respondents are unable to recall a type.



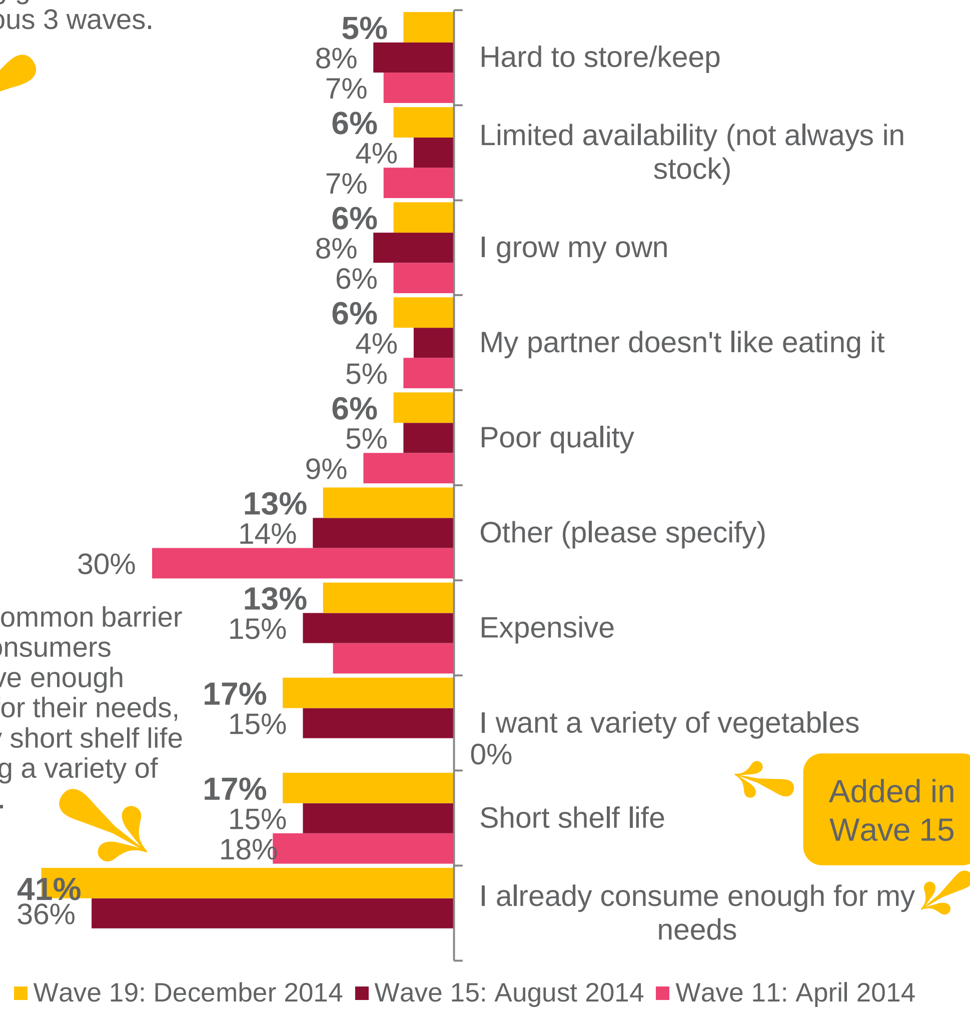
Triggers and Barriers to Purchase

Key triggers to purchase were health and taste, with the former experiencing strong gains over the previous 3 waves.

Triggers



Barriers



The most common barrier was that consumers already have enough cucumber for their needs, followed by short shelf life and wanting a variety of vegetables.

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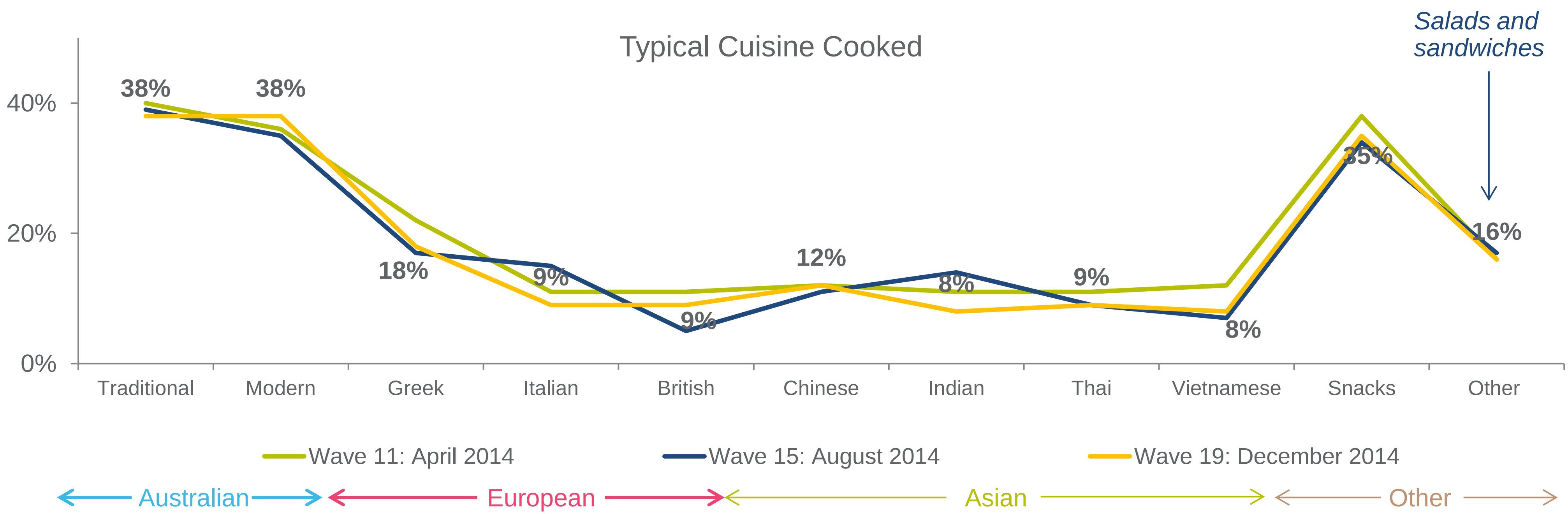
Sample Wave 11, N=301, Wave 15, N=337 and Wave 19 N=359
Q7. Which of the following reasons best describes why you purchase <commodity> ?
Q8. Which reason best describes why you don't buy <commodity> more often?

From previous waves there has been a fall in the use of Cucumber in Traditional Australian, Italian and Indian cuisines, however an increase in Modern Australian.

Weekday Dinner has become the primary consumption occasion in Wave 19, in line with the change in season, and with it bringing increases across all consumption occasions.

Wave 19 Top 5 Consumption Occasions

	Wave 19	Wave 15	Wave 11
Weekday Dinner	**44%**	32% ▼	38% ▼
Weekday Lunch	**43%**	40% ▼	46% ▲
Quick Meals	**38%**	37% ▼	37% ▼
Weekend Lunch	**38%**	36% ▼	33% ▼
Weekend Dinner	**37%**	24% ▼	25% ▼



Sample Wave 11, N=301, Wave 15, N=337 and Wave 19 N=359
Q10. What cuisines do you cook/consume that use <commodity> ?
Q11. Which of the following occasions do you typically consume/use <commodity> ?

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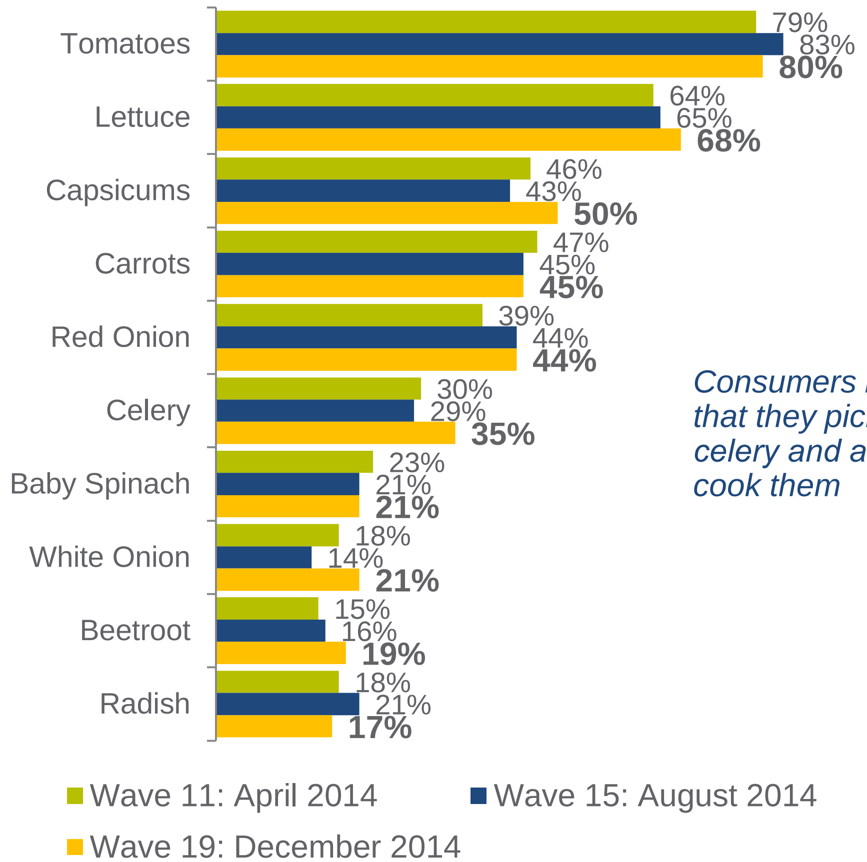
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Cucumber is mostly eaten raw, continuing as the most popular cooking style.

Typically, cucumber is served with tomatoes and lettuce, typical salad ingredients, with the latter becoming more prevalent as an accompanying vegetable in the warmer months.

Top 10 Accompanying Vegetables

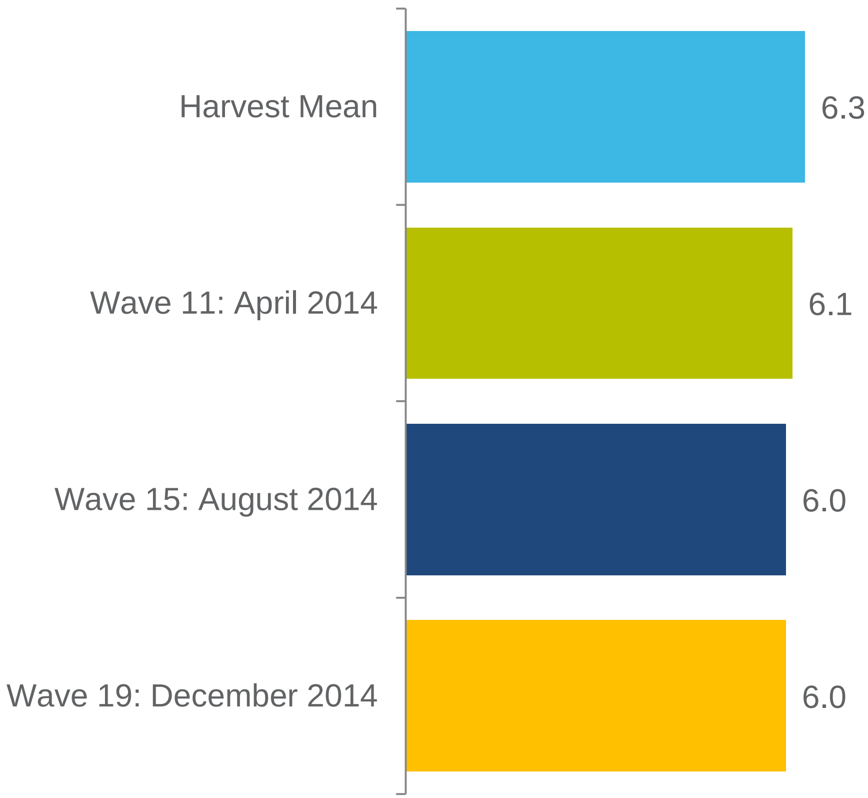


Consumers indicated that they pickle celery and also don't cook them

Top 10 Cooking Styles			
	Wave 11	Wave 15	Wave 19
Raw	79%	82%	77%
Other	18%	12%	16%
Stir frying	8%	9%	12%
Grilling	2%	3%	4%
Steaming	3%	5%	4%
Blend	1%	4%	4%
Soup	5%	4%	4%
Roasting	2%	2%	3%
Boiling	0%	2%	3%
Sautéing	1%	4%	3%

Sample Wave 11, N=301, Wave 15, N=337 and Wave 19 N=359
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?

Although lower than the Harvest mean, importance of cucumber provenance has been consistent across waves, indicating that in comparison to other vegetables provenance is as influential on purchase.



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Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 11, N=301, Wave 15, N=337 and Wave 19 N=359

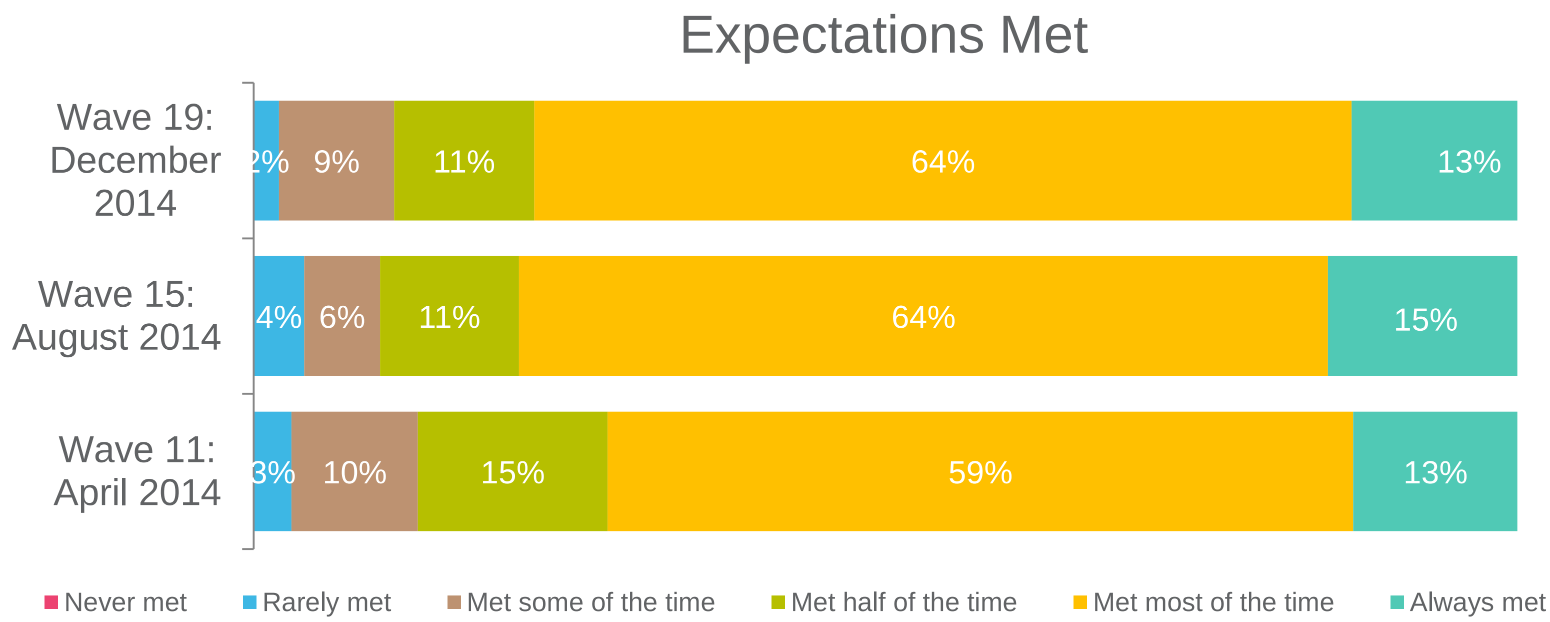
Cucumber is expected to stay fresh for just over a week once purchased, which has declined over the previous wave, but remains in line with Wave 11.

Over three quarters of respondents feel their expectations of cucumber freshness were met at least most of the time.

Expected to stay fresh for **7.8** days

▼ 7.7 days, Wave 11

▲ 8.1 days, Wave 15



Sample Wave 11, N=301, Wave 15, N=337 and Wave 19 N=359
Q12. How long do you expect <commodity> to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy <commodity> ?

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

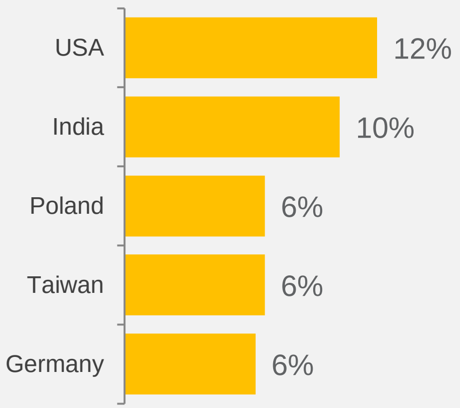
Trends:
Cucumber

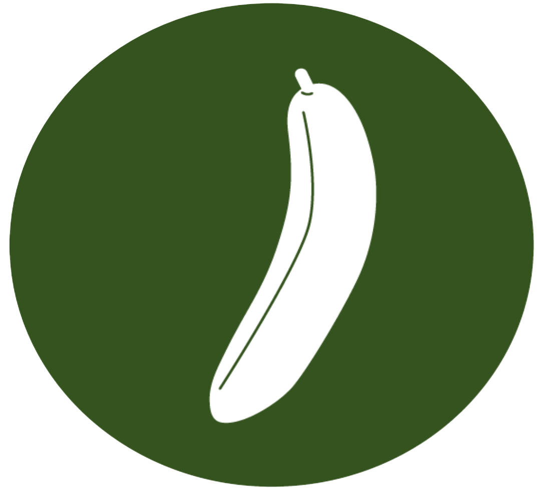
Cucumber Global NPDs

September – December 2014

There were 232 products launched globally in the last three months that contained cucumber as an ingredient. The majority of launches occurred in Asia Pacific and Europe regions. The key categories for launches were skincare, meals and sauces and juice drinks.

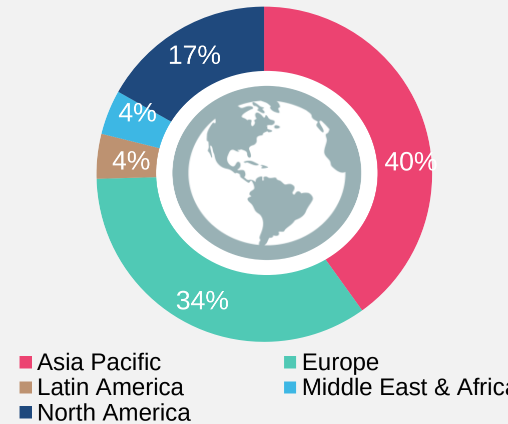
Country



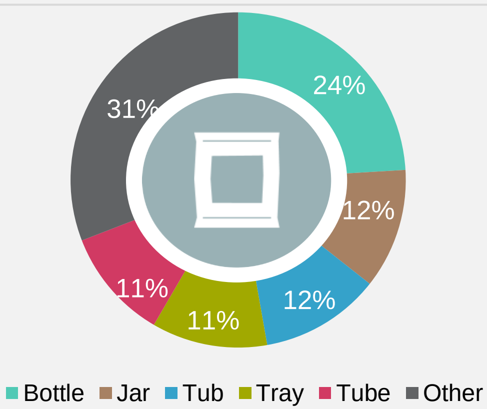


232 Global Launches

Region



Top Pack Formats



Categories

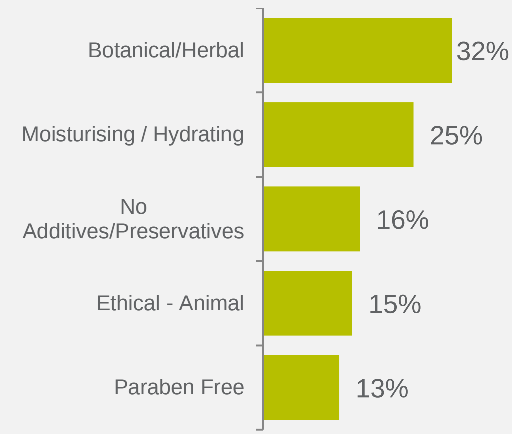
Skincare 34%

Meals 16%

Sauces 14%

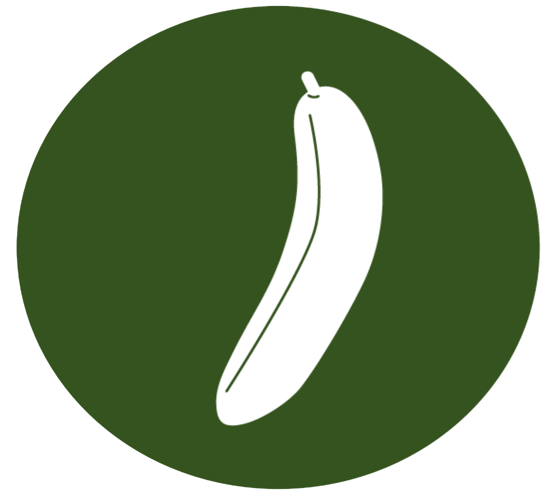
Juice drinks 9%

Top Claims



Cucumber Product Launches:
Last 3 Months (October – December 2014)
Summary

- There were 232 cucumber products launched globally. This was notably less than previous trends.
- Eight cucumber products were launched in Australia over the last three months. These were mainly salads, sauces and sprays.
- Key regions for launch were Asia Pacific (40%) and Europe (34%) .
- Bottles (24%), Jars (12%) and Tubs (12%) were the most common packaging formats used.
- Top category launches were skincare (34%), meals (16%) and sauces & seasonings (14%).
- The top claims used for products were botanical/herbal (32%), moisturising/hydrating (24%) and no additives (16%).
- The most innovative launch were fruit drinks and cosmetic products (examples of these can be found in the following pages).

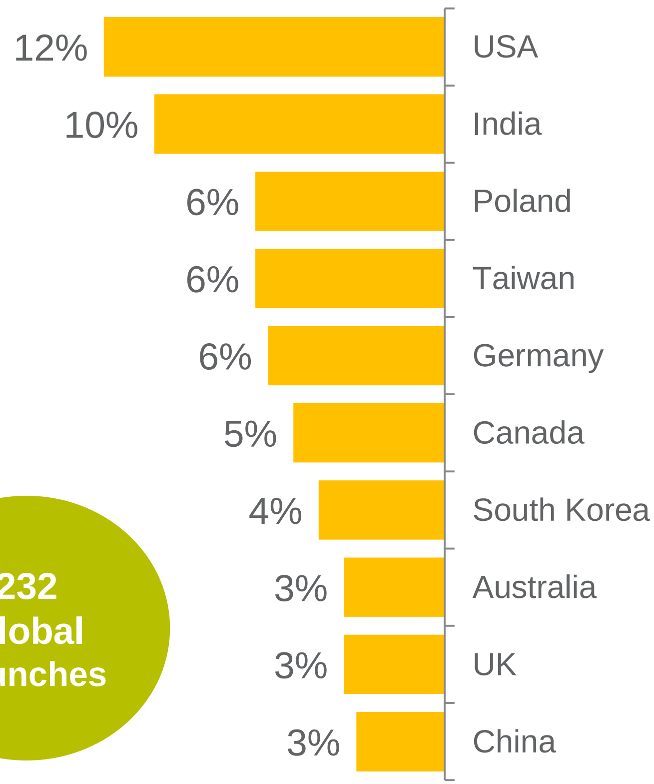


Source: Mintel (2014)

Cucumber Launches

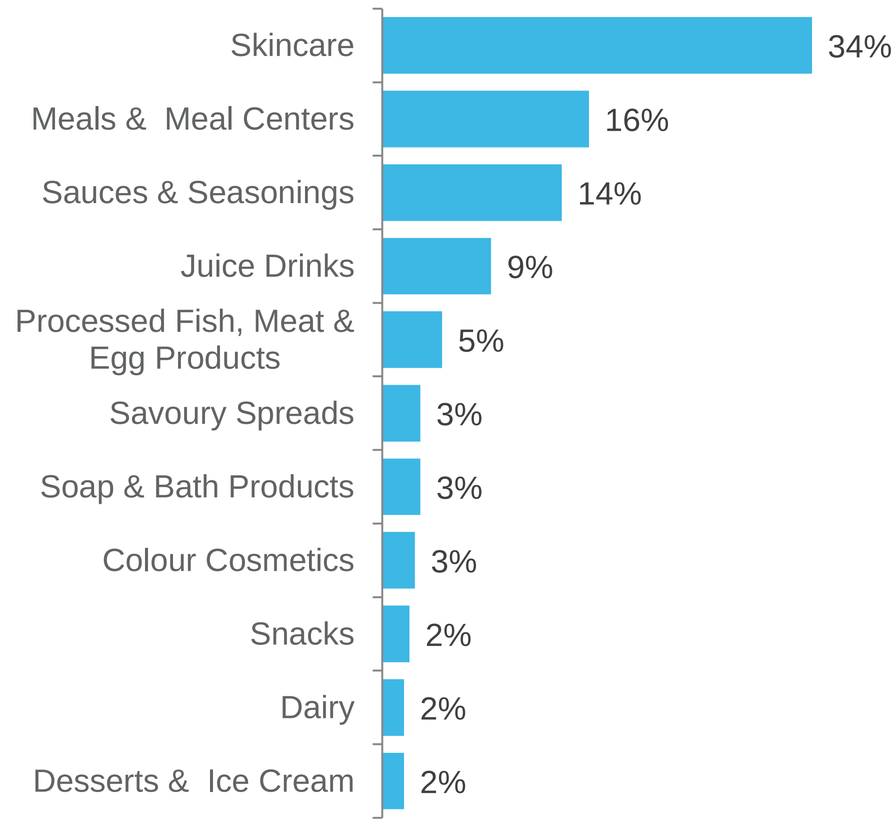
- USA was the key country for cucumber launches over the past 3 months. India and Poland also had a large number of launches.
- Key categories for products launched were skincare, meals and sauces & seasonings.

Top Launch Countries



232 Global Launches

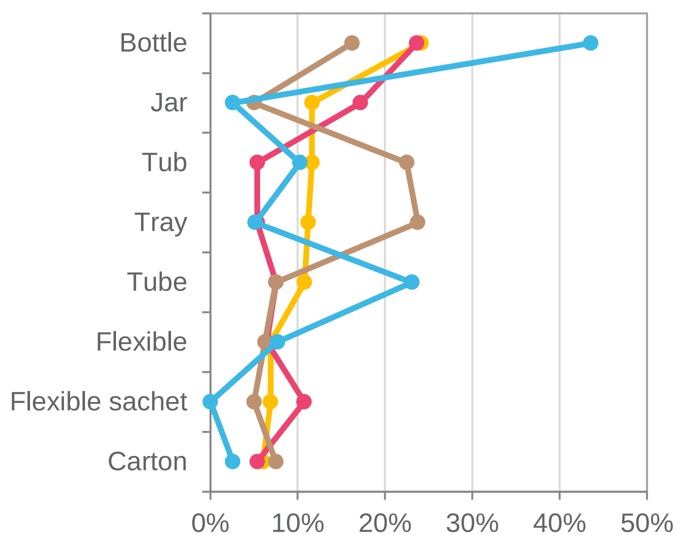
Top Launch Categories



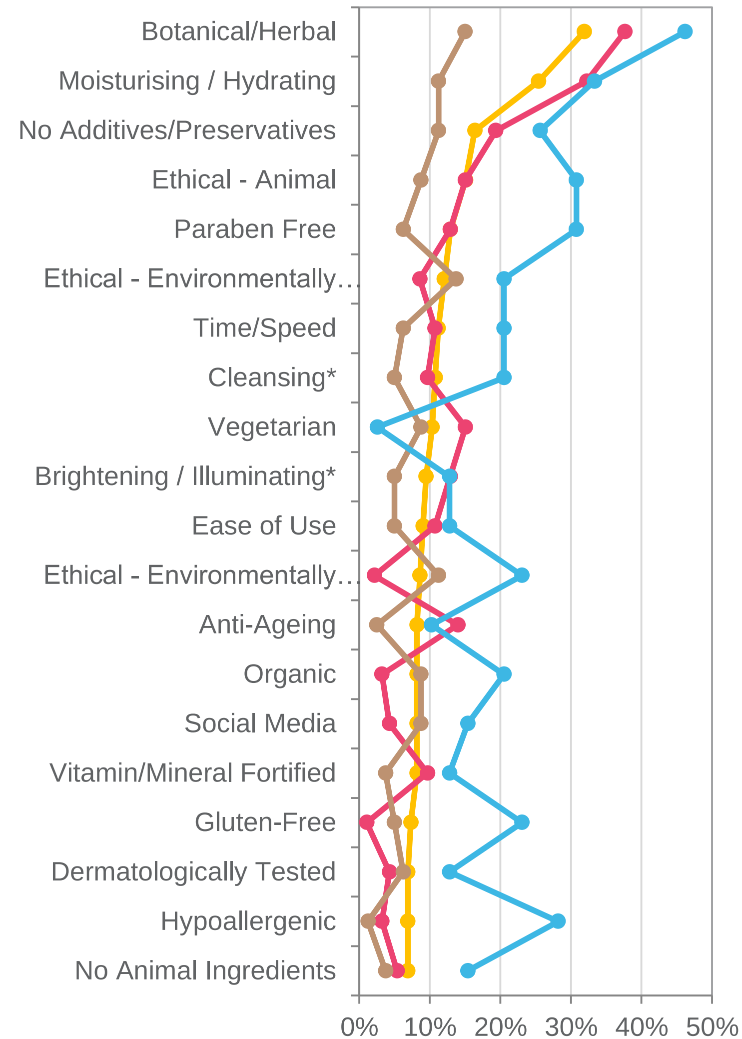
Cucumber Launches

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

Top Pack Formats Launched



Top Claims Launched



Only regions with n >30 are displayed

Innovative Cucumber Launches:
L3M (October – December 2014)

T.L.Bai Cucumber Whitening and Nourishing Face Mask (China)

T.L.Bai Cucumber Whitening and Nourishing Face Mask contains antioxidant cucumber extract and is said to whiten and moisturise skin for a translucent, hydrated and healthy-looking complexion. The product has not been tested on animals, and retails in a pack containing 10 x 38g units.

Claims:
Botanical/Herbal, Moisturising / Hydrating, Antioxidant, Ethical - Animal, Whitening

Semone Cucumber Black Spots Herbal Soap (Nigeria)

Semone Cucumber Black Spots Herbal Soap, with honey, is produced from naturally based, fine quality ingredients to give a feel of cleanliness and freshness all day long. The product retails in a 120g pack.

Claims:
Botanical/Herbal, Whitening

Skin Food Premium Lettuce & Cucumber Watery Emulsion (Singapore)

Skin Food Premium Lettuce & Cucumber Watery Emulsion is formulated with 5% lettuce extract and 5% cucumber extract, with 20% cucumber water to deeply hydrate the skin with a soothing effect. The product is free from artificial colours, mineral oil, imidazolidinyl urea, benzophenone, triethanolamine and talc. It retails in a 140ml pack.

Claims:
Botanical/Herbal, No Additives/Preservatives, Mineral Oil/Petroleum Free, Moisturising / Hydrating, Toning*

Organic Harvest Green Cucumber Toner (India)

Organic Harvest Green Cucumber Toner is designed to hydrate and cool the skin and help to minimise the appearance of pores. It offers effective moisture with cucumber extract, for freshness all day. Suitable for normal to dry skin, the product is free from parabens, alcohol, mineral oil, PABA, petrolatum, paraffin and animal ingredients.

Claims:
No Additives/Preservatives, All Natural Product, Organic, Mineral Oil/Petroleum Free, Anti-Bacterial, Botanical/Herbal, pH Neutral, Whitening, Antioxidant, Anti-Ageing, Anti-Acne, Skin Disorders.

Source: Mintel (2014)

Innovative Cucumber Launches:
L3M (October – December 2014)

Ballerina Natural Yogurt y Pepino Yogurt & Cucumber (Chile)

Ballerina Natural Yogurt y Pepino Shampoo Natural Cabello Seco (Yogurt & Cucumber Dry Hair Natural Shampoo) is now available in a newly designed 1000ml pack. The product is part of a range of haircare products made with the freshness and silkiness of yogurt and cucumber extracts. The Shampoo is said to leave dry hair hydrated, manageable and easier to comb.

Claims:
Botanical/Herbal, Moisturising / Hydrating

Picard Aperitif Balls (France)

Picard Boules Apéritives (Aperitif Balls) are now available for the festive season. This limited edition product includes the following varieties: lobster-crunchy vegetables with grapefruit and raspberry vinaigrette, smoked salmon tartare and green apple and lemon mascarpone with blini, and scallop carpaccio and mango and avocado tartare with orange mousse

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

Merl Meat Salad with Fine Meat Sausage and Cucumber (Germany)

Merl Fleischsalat mit Feiner Fleischwurst und Gurken (Meat Salad with Fine Meat Sausage and Cucumber) has been relaunched and is now available in a newly designed 175g pack. The product contains no added preservatives and is described as a deli quality meat salad.

Claims:
No Additives/Preservatives, Ethical - Animal

Angelia Mango Flavoured Sea Cucumber Fruit Drink (China)

Angelia Mang Guo Wei Hai Shen Yin Pin (Mango Flavoured Sea Cucumber Fruit Drink) contain greater than or equal to 12.4mg sea cucumber polysaccharides, and is described as the 21st Century healthy drink. This product retails in a 248ml pack.

Claims:
No information available

Source: Mintel (2014)

Innovative Cucumber Launches:
L3M (October – December 2014)

Clairol Herbal Essences Mean Stinks Fearlessly Fresh (USA)

Clairol Herbal Essences Mean Stinks Fearlessly Fresh Lightweight Conditioner is formulated with tea tree essences and 'intriguing' ingredients, featuring an incredible fragrance and supporting an irresistibly touchable hair. The product is free from heavy buildup and retails in a 10.1-fl. oz. pack, featuring the Mean Stinks Stand Up Against Bullying campaign.

Claims:
Botanical/Herbal

Long Home Pickled Cucumber (Taiwan)

Long Home Pickled Cucumber is said to be naturally brewed using a traditional fermentation process. The vegan product contains no preservatives, and is retailed in a 460g pack.

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

Evolution Fresh Cold-Pressed Sweet Greens & Lemon Juice (USA)

Evolution Fresh Cold-Pressed Sweet Greens & Lemon Juice Blend has been repackaged and is now available in a 32-fl.oz. pack featuring a QR code. It comprises juices of celery, apple, cucumber, spinach, romaine, kale, lime, lemon and parsley. The high pressure processed juice blend is free from GMO and has been kosher certified.

Claims:
Kosher, GMO-Free

Kustie Cucumber Body Butter (Philippines)

Kustie Cucumber Body Butter contains 100% of natural extract from moisturising cucumber extract to refresh and soothe the skin. This product retails in a 50ml pack.

Claims:
Botanical/Herbal, Moisturising / Hydrating

Source: Mintel (2014)

Australian Cucumber Launches:
L3M (October – December 2014)

Chris' Heritage Dips Classic Greek Tzatziki Dip

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

SunRice Global Kitchen Middle Eastern Style Rice

Claims:
No Additives/Preservatives, Microwaveable

Woolworths Select Classic Burger Sauce

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

Natralus Paw Paw Pure Spray Gel

Claims:
Alcohol Free, No Additives/Preservatives, Vitamin/Mineral Fortified, Botanical/Herbal, Fragrance Free, Ethical - Environmentally Friendly Package, Ethical - Animal, Organic, Time/Speed

Source: Mintel (2014)

Eggplant.

Consumers purchase Eggplant on average three to four times per month, and consume five times per month.

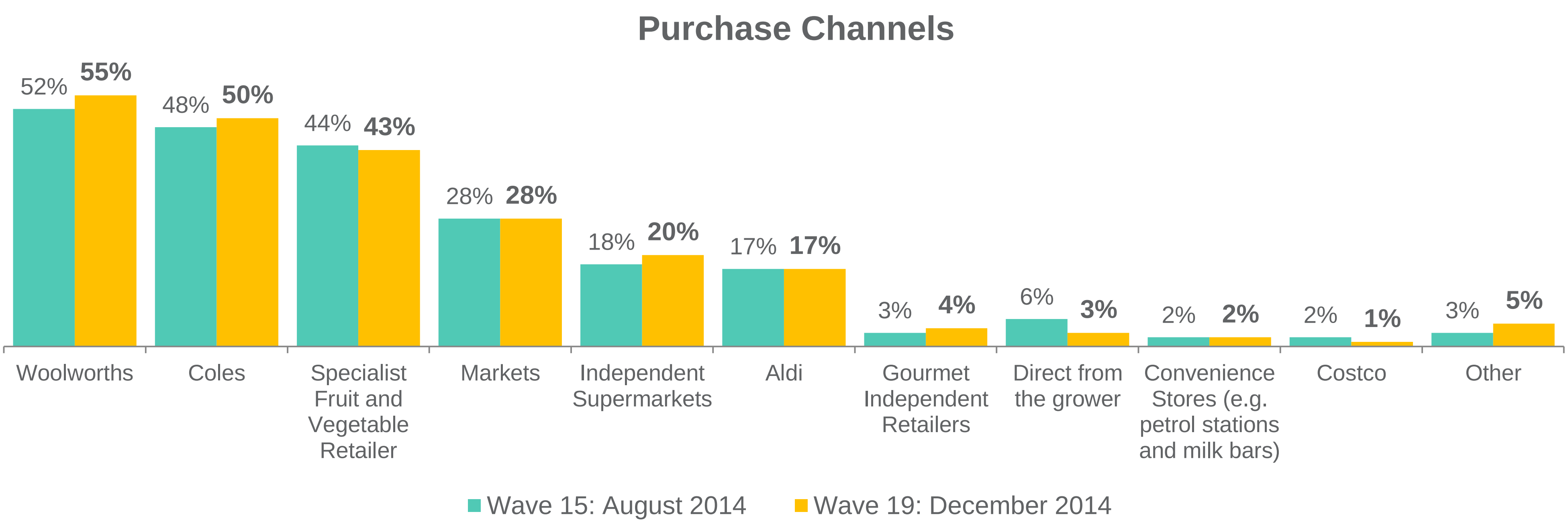
Eggplant is primarily purchased through mainstream retailers and specialist grocers, consistent with the previous wave.

Average Purchase **3.5** times per month

▼ 3.1 times, Wave 15

Average Consumption **4.9** times per month

▼ 4.4 times, Wave 15



Q1. On average, how often do you purchase <commodity>?
Q2. On average, how often do you consume <commodity>?
Q5. From which of the following channels do you typically purchase <commodity>?
Sample Wave 15, N=306 and Wave 19 N=304

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

Average Spend and Price Sensitivity

Average weight of purchase

On average consumers purchase **930g** of eggplant, marginally more than the previous wave.

▼ 900g, Wave 15

Recalled last spend

Recalled last spend on eggplant purchase was **$4.17**, declining over wave 15.

▲ $4.39, Wave 15

Value for money

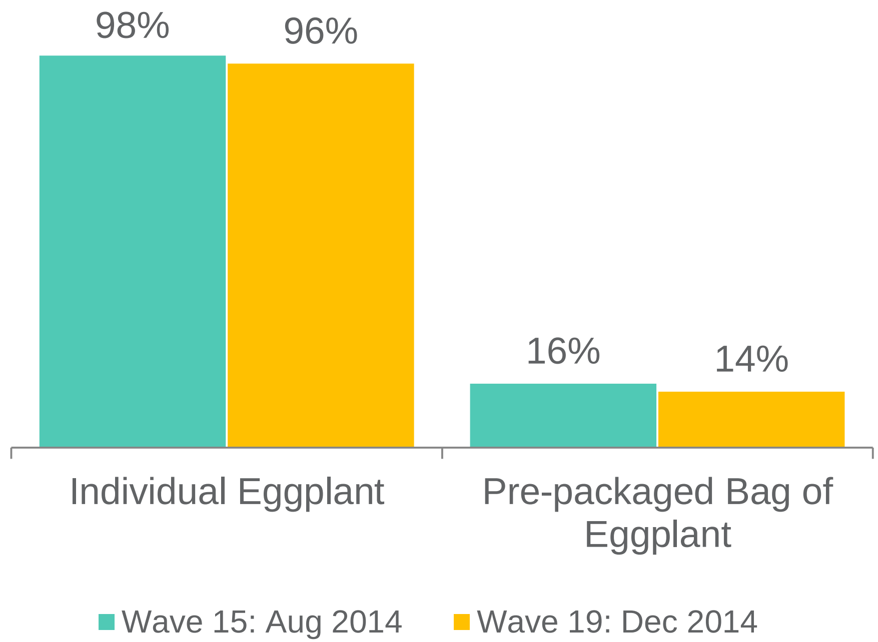
Overall consumers' perceived value for money is only fair **(6.1/10)**, which represented an increase over the previous wave.

▼ 6.0/10, Wave 15

Q3. How much <commodity> do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? *0-10 scale*
Sample Wave 15, N=306 and Wave 19 N=304

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

The majority of consumers purchase loose eggplants. However a small number of consumers purchase both formats.

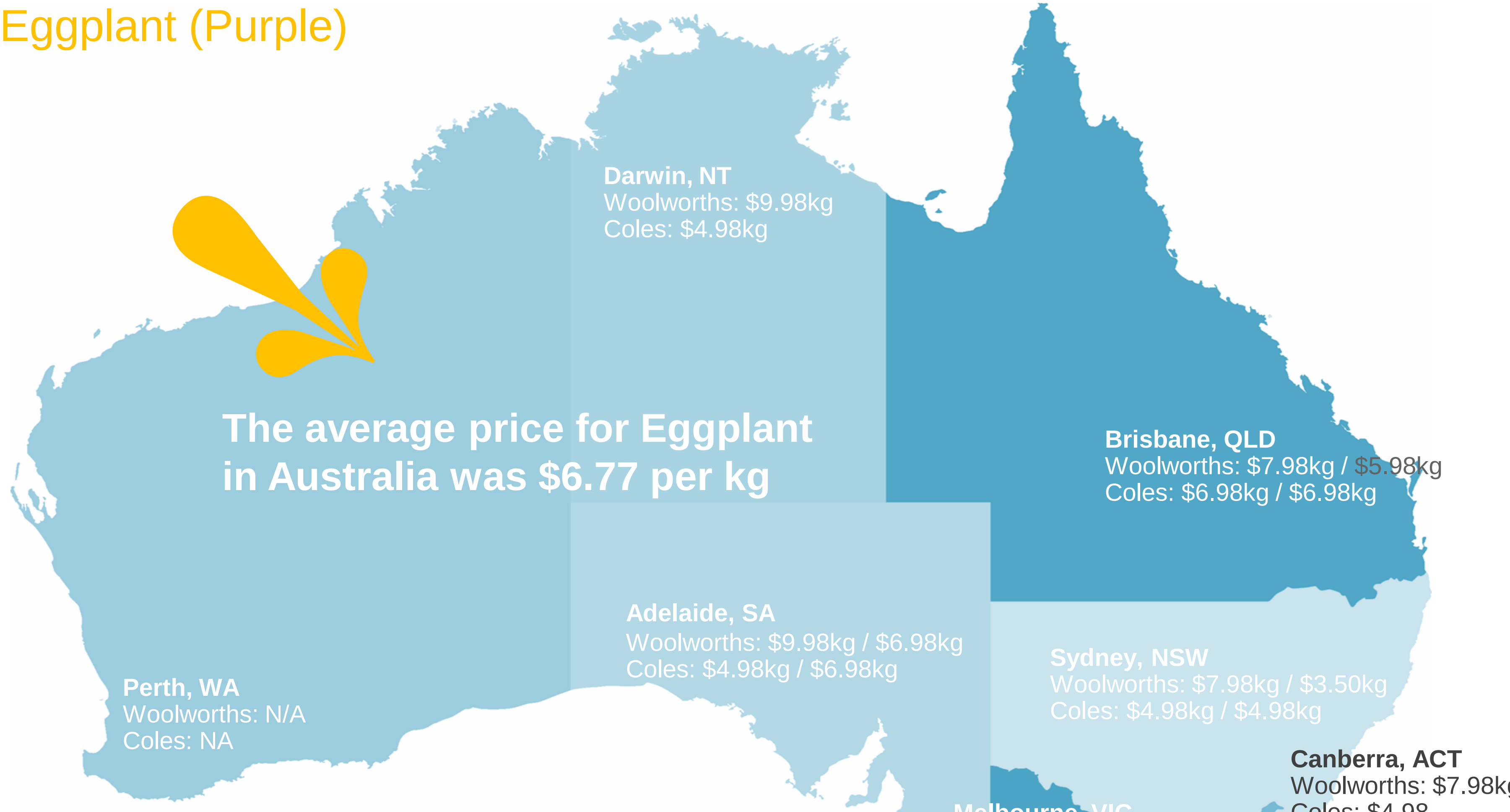


Average Amount Purchased	Individual	Pre-packaged Bag
Wave 15: August 2014	2.0	2.0
Wave 19: December 2014	2.2	1.7

Q3a. How much <commodity> does this typically equate to?
Sample Wave 15, N=306 and Wave 19 N=304

Online and In-store Commodity Prices

Eggplant (Purple)

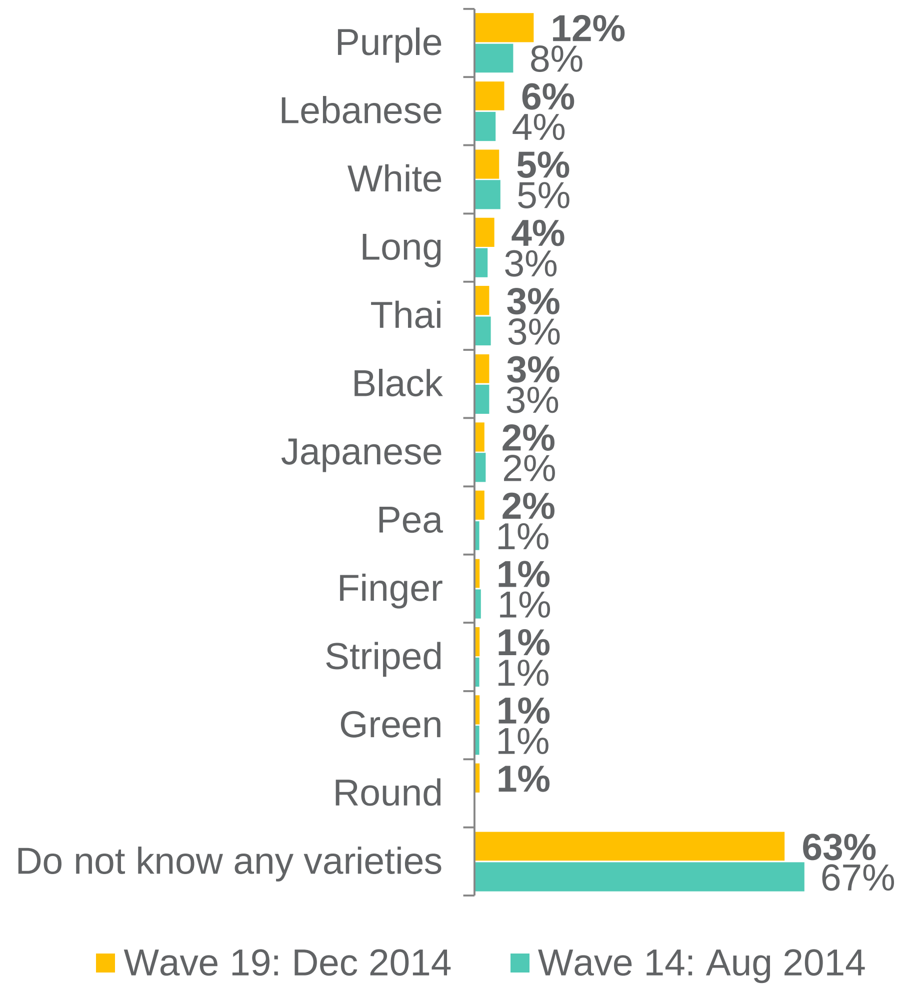


- Average price per kilo was $6.77kg in December 2014, which was substantially lower than August 2014 at $8.98kg.
- Eggplant prices had a large range between states, with the highest price at $9.98kg while the lowest price sat at $4.90kg in Hobart.
- Because of the high variability in price there was a relatively high retail price range for eggplant, $5.08kg.

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

Spontaneous Awareness of eggplant varieties remains low, with two thirds of consumers unable to recall a type.

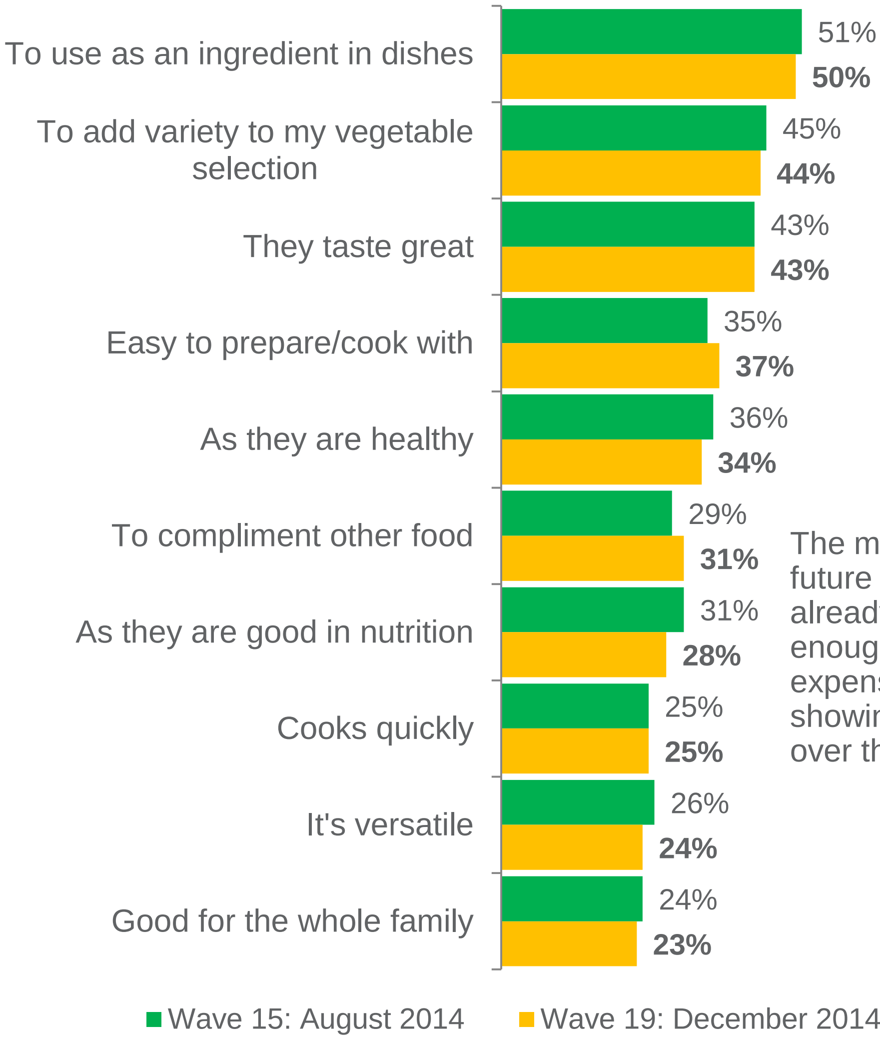
A small number of consumers who could recall a type are prompted by colour and location.



Q6a. What types/varieties of <commodity> are you aware of? (unprompted)
Sample Wave 15, N=306 and Wave 19 N=304

Triggers and Barriers to Purchase

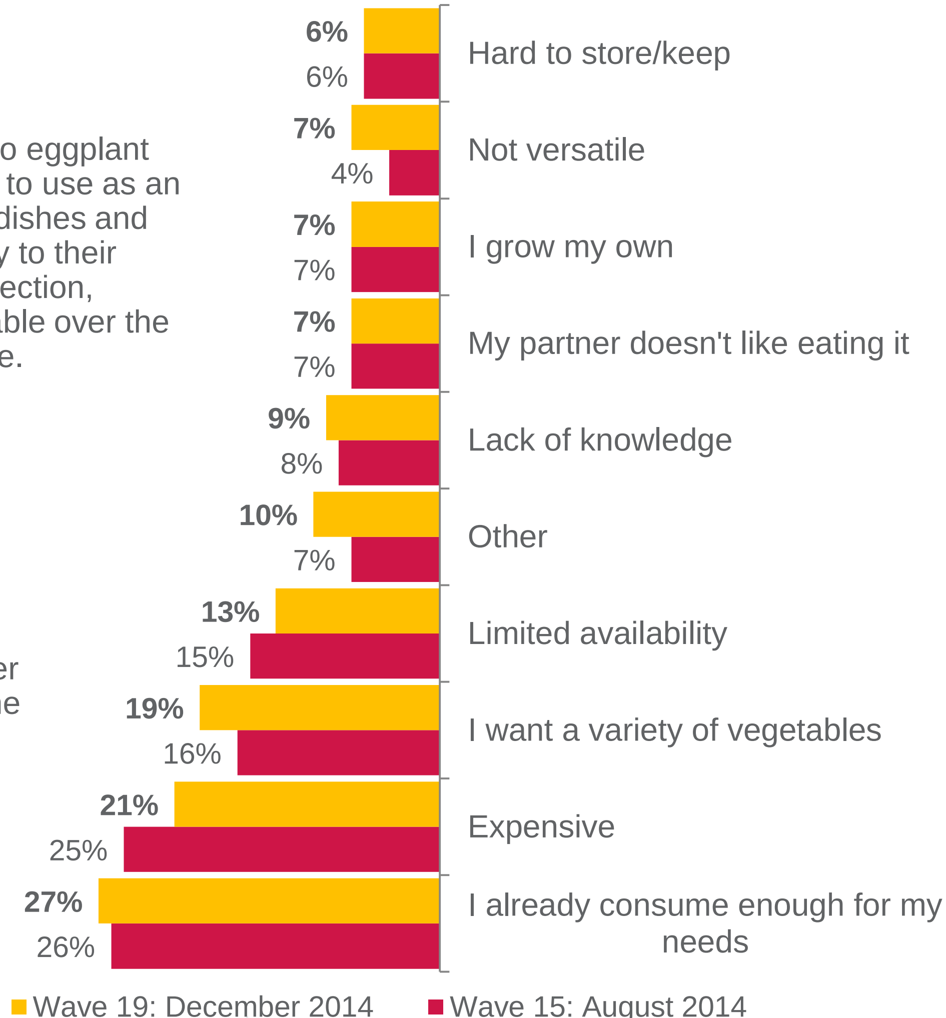
Triggers



Key triggers to eggplant purchase are to use as an ingredient in dishes and adding variety to their vegetable selection, remaining stable over the previous wave.

The main barriers to future purchase is already consuming enough eggplant and expense, with the latter showing sign of decline over the last wave.

Barriers



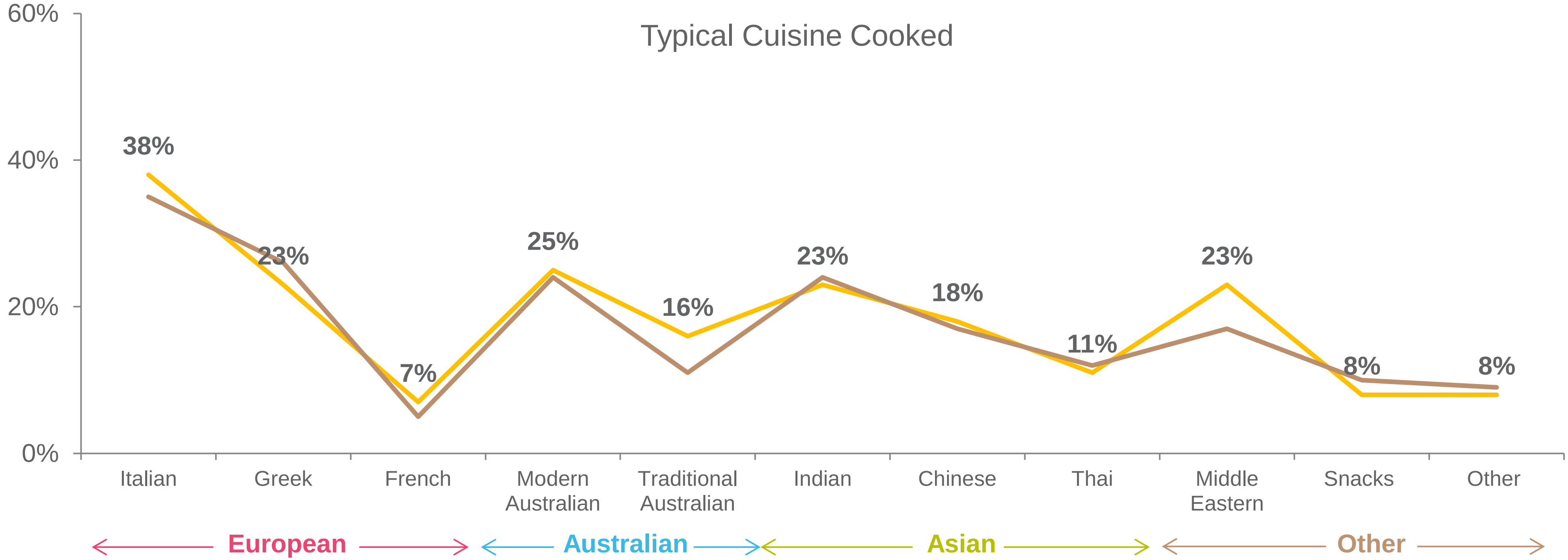
Sample Wave 15, N=306 and Wave 19 N=304
Q7. Which of the following reasons best describes why you purchase <commodity> ?
Q8. Which reason best describes why you don't buy <commodity> more often?

Eggplant is typically used in Italian and modern Australian cuisine, however a spike in Middle Eastern cuisine was observed in Wave 19.

Weekday and weekend dinners are the main consumption occasions, with one fifth trying Eggplant in new recipes.

Wave 19 Top 5 Consumption Occasions

	Wave 19	Wave 15
Weekday Dinner	**49%**	49% ▬
Weekend Dinner	**36%**	32% ▼
Family meals	**30%**	35% ▲
Every-day	**21%**	20% ▼
New recipes	**21%**	19% ▼

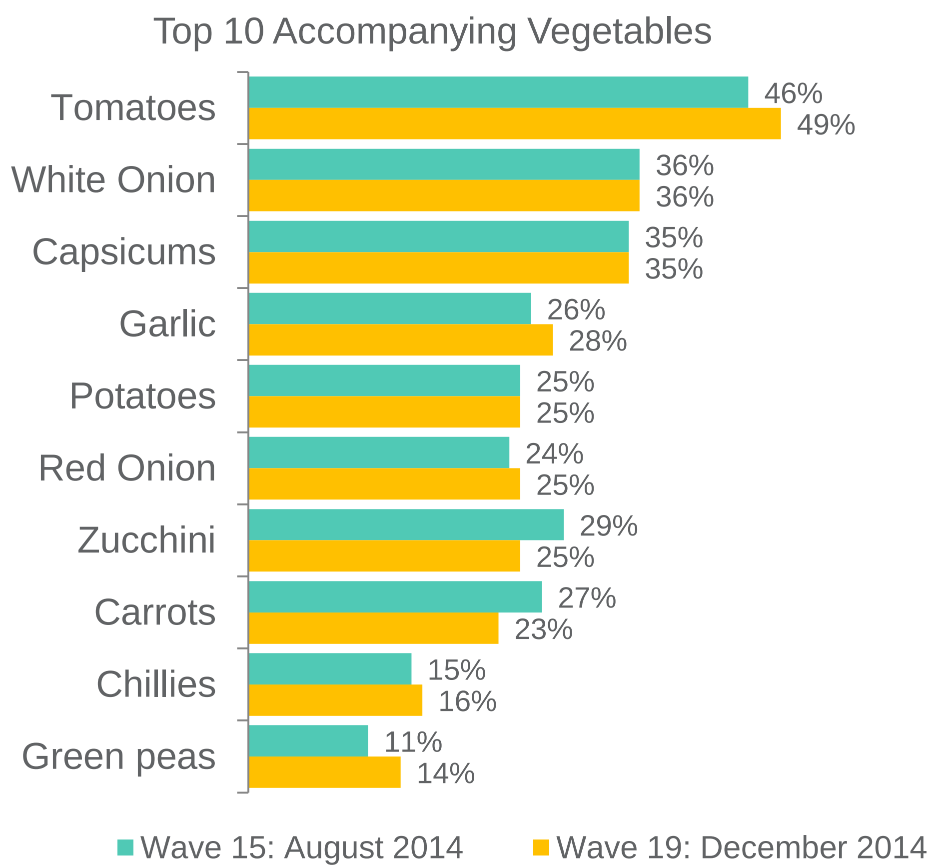


Sample Wave 15, N=306 and Wave 19 N=304
Q10. What cuisines do you cook/consume that use <commodity> ?
Q11. Which of the following occasions do you typically consume/use <commodity> ?

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

Eggplant is generally served with tomatoes, onion and carrots, with the former making gains over the previous wave.

Consumers prefer to grill, roast, stir fry and bake eggplant, consistent with the previous wave.

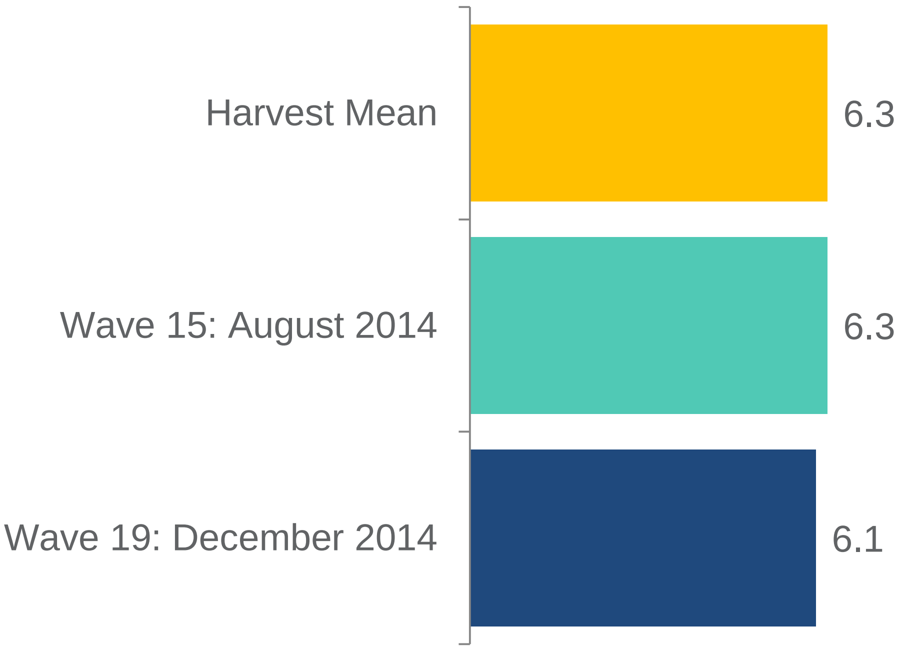


Top 10 Cooking Styles		
	Wave 15	Wave 19
Grilling	38%	43%
Roasting	33%	36%
Stir frying	32%	33%
Baking	32%	29%
Sautéing	20%	26%
Shallow Frying	29%	25%
Stewing	23%	21%
Deep Frying	11%	16%
Mashing	6%	9%
Steaming	8%	8%

Sample Wave 15, N=306 and Wave 19 N=304
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?

Horticulture Innovation Australia
colmar brunton.

The importance of provenance has declined slightly in Wave 19, sitting below the Harvest mean and the previous wave.



AUSTRALIAN MADE

Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 15, N=306 and Wave 19 N=304

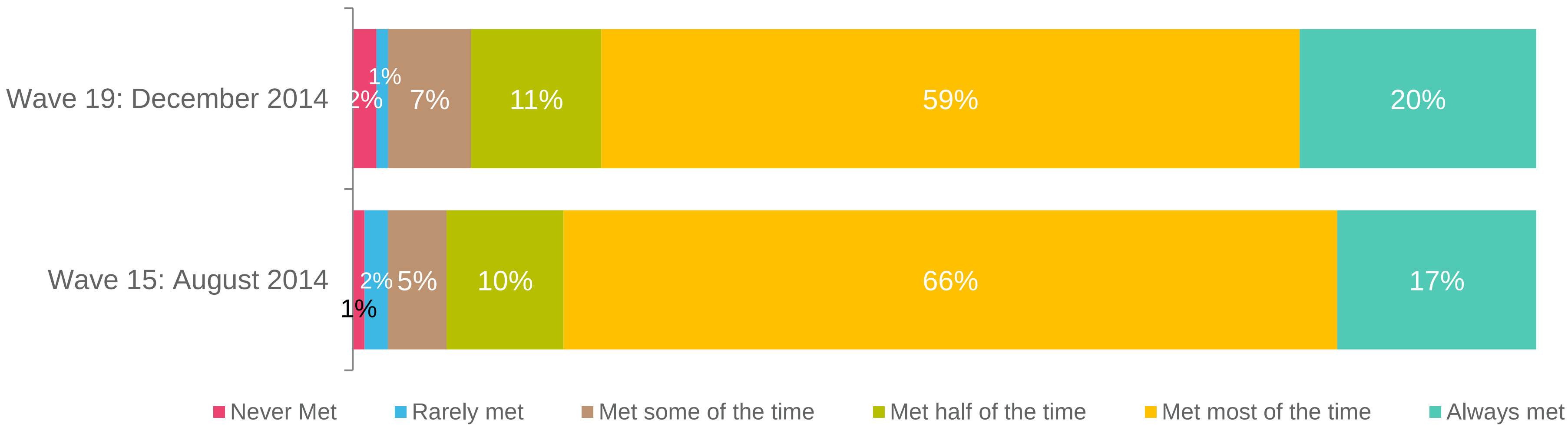
Consumers expect eggplant to remain fresh for just over one week once purchased, a notable increase since the previous wave.

For almost 4 in 5 consumers, expectations of freshness are met most of the time or always met.

Expected to stay fresh for **8.6** days

▼ 7.8 days, Wave 15

Expectations Met



Sample Wave 15, N=306 and Wave 19 N=304
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

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

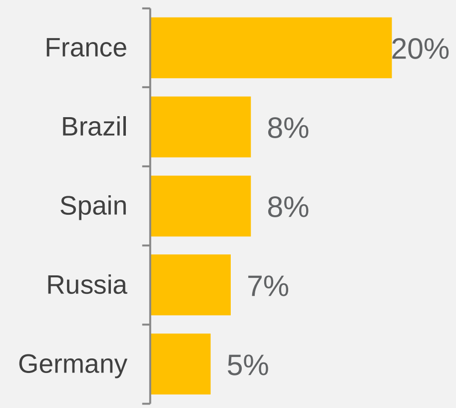
Trends: Eggplant

Eggplant Global NPDs

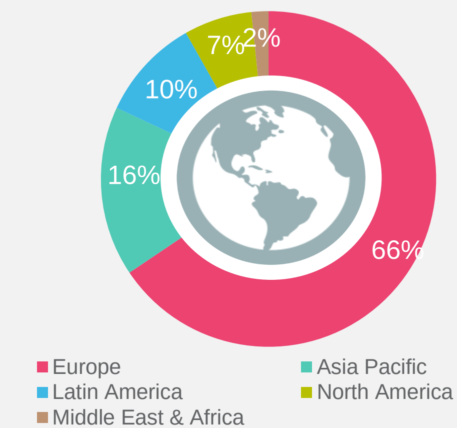
October – December 2014

There were 61 products that contained Eggplant as an ingredient launched globally over the last three months. The majority of those launches occurred in Europe, particularly in France. Products ranged from meals, spreads, savoury spreads and fruit & vegetables.

Country

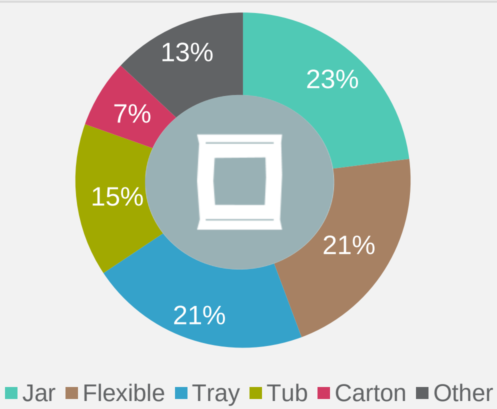


Region



61 Global Launches

Top Pack Formats



Categories

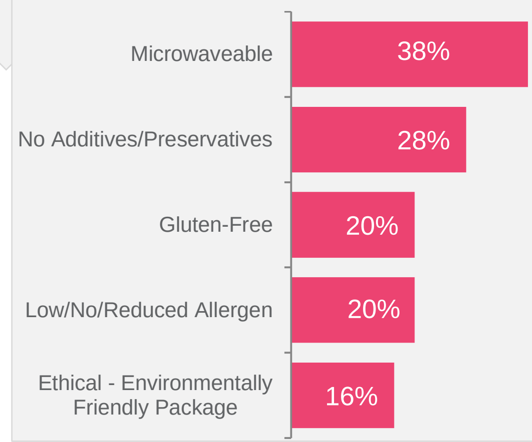
Meals 33%

Savoury Spreads 16%

Fruit & Vegetables 15%

Sauces & Seasonings 13%

Top Claims



Eggplant Product Launches:
L3M (October – December 2014)

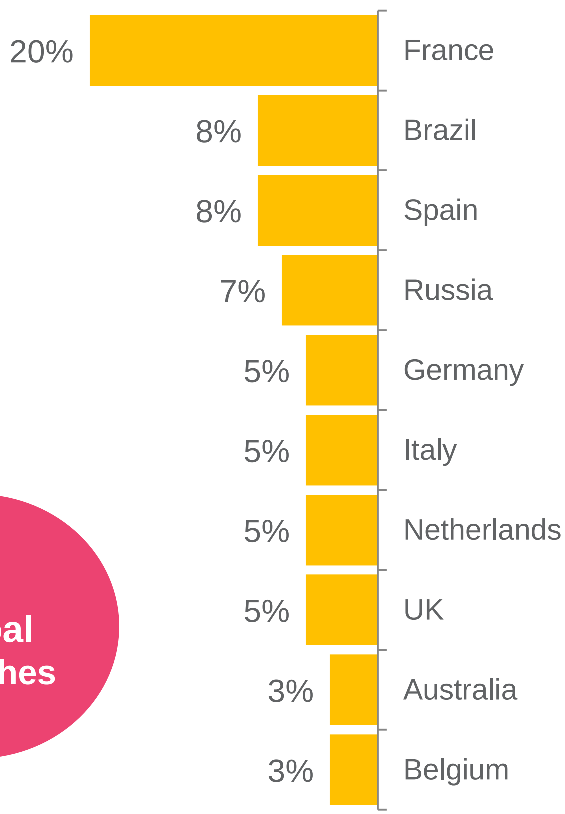
- There were 61 Eggplant products launched globally in the last three months.
- There were two products launched in Australia, two Mediterranean dips.
- The majority of eggplant launches occurred in Europe (66%), followed by Asia Pacific (16%) and Latin America (10%).
- Categories for launches were meals (33%), savoury spreads (16%) and fruit and vegetables (15%).
- Key claims used on products were around convenience, being microwavable (38%), and health (no additives 28%, gluten free 20% and reduced allergens 20%).
- A variety of packaging formats were used including Jars (23%), flexible formats (21%) and trays (21%).
- The most innovative products launched were Eggplant parmasan cheese from USA and dried Eggplant from Mexico (examples of which can be found in the following pages).

Source: Mintel (2014)

Eggplant Launches

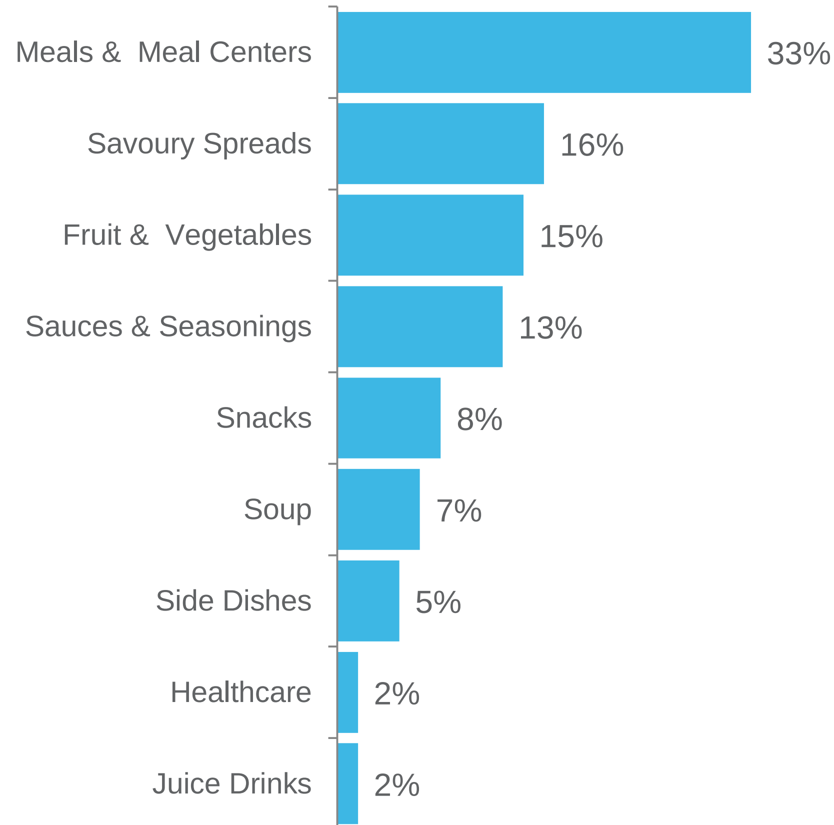
- The key country for eggplant launches was France. Brazil, Spain and Russia also had a large number of launches.
- The majority of products launched over the last three months were meals. Savoury spread, fruit & vegetable products were also common.

Top Launch Countries



61 Global Launches

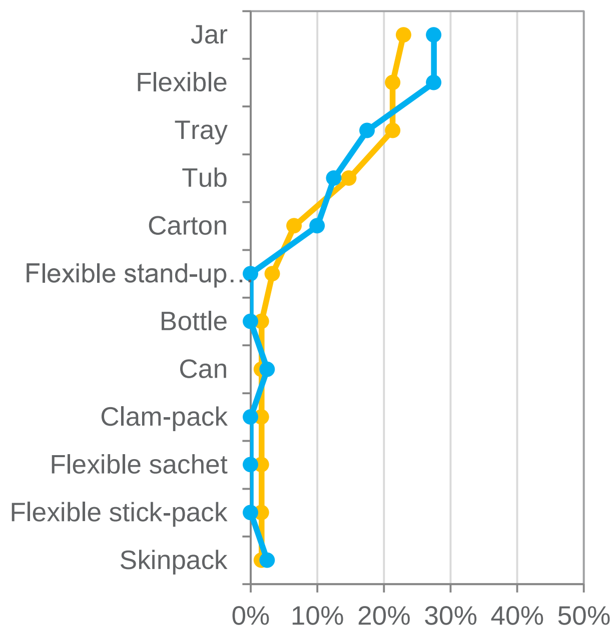
Top Launch Categories



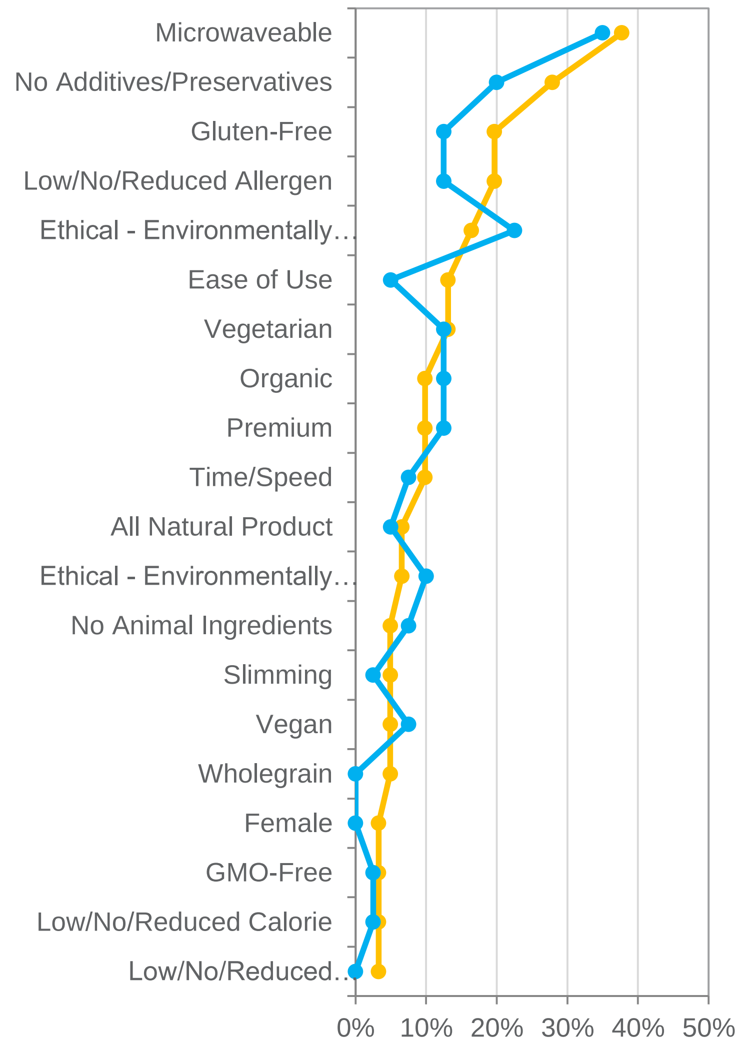
Claims & Pack Formats

- The main packaging formats used for eggplant products were Jars and flexible packs.
- Key claims were microwavable, no additives and Gluten-free.

Top Pack Formats Launched



Top Claims Launched



Global N=61 Europe n=40

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colmar brunton.

Number of Global NPD for the L3M N=61
Only regions with n >30 are displayed

Innovative Eggplant Launches:
L3M (October – December 2014)

Michael Angelo's Eggplant Parmesan (USA)

Michael Angelo's Eggplant Parmesan has been repackaged. This microwaveable product comprises organic tomatoes, eggplant and breadcrumbs. It retails in a 10-oz. pack featuring the Facebook and Twitter links.

Claims:
Hormone Free, Ethical - Animal, Microwaveable, Ease of Use, Organic, Social Media

Mt. Vikos Baba Ghanoush Spread (USA)

Mt. Vikos Baba Ghanoush Spread has been repackaged, and now retails in a newly designed 7.6-oz. pack. This authentic Greek product is all natural, and contains no GMO.

Claims:
All Natural Product, GMO-Free

Carrefour Eggplant Spread (China)

Carrefour Qie Zi Tiao Liao Jiang (Eggplant Spread) is now available. This product retails in a 100g pack.

Claims:
No information available

Noyan Grilled Vegetables Imambayaldy (Russia)

Noyan Zharenyye Ovoshchi Imambayaldy (Grilled Vegetables Imambayaldy) are free from preservatives and made from only natural ingredients. The product retails in a 560g pack.

Claims:
No Additives/Preservatives, All Natural Product

Source: Mintel (2014)

Innovative Eggplant Launches:
L3M (October – December 2014)

Gli Stuzzicanti! Grigliati Grilled Aubergines in Sunflower Oil (Italy)

Gli Stuzzicanti! Grigliati Melanzane Grigliate in Olio di Girasole (Grilled Aubergines in Sunflower Oil) are now available. The product has a rustic flavour and a light grilling and retails in a 230g jar.

Claims:
No information available

Adyar Ananda Bhavan Eggplant Thokku (India)

Adyar Ananda Bhavan Brinjal Thokku (Eggplant Thokku) is free from cholesterol and trans fat and can be enjoyed by adding to hot rice. The product is suitable for vegetarians and retails in a 400g pack.

Claims:
Low/No/Reduced Transfat, Vegetarian, Low/No/Reduced Cholesterol

Dai Dong Thuan Sweet and Sour Eggplant (Vietnam)

Dai Dong Thuan Ca Phao Chua Ngot (Sweet and Sour Eggplant) is ready to eat. The product is free from borax and retails in a 400g pack.

Claims:
Ease of Use

Fun Fruit Aubergine with Chili (Mexico)

Fun Fruit Berenjena Enchilada (Aubergine with Chili) is now available. The product retails in a 150g pack.

Claims:
No information available

Source: Mintel (2014)

Innovative Eggplant Launches:
L3M (October – December 2014)

La Pianezza Gourmet Aubergine Pâté (Brazil)

La Pianezza Gourmet Patê de Beringela (Aubergine Pâté) is a source of fiber, contains green banana, and is free from gluten, lactose, artificial colours, flavours and preservatives. The product retails in a 145g jar.

Claims:
Low/No/Reduced Lactose, No Additives/Preservatives, Low/No/Reduced Allergen, Gluten-Free

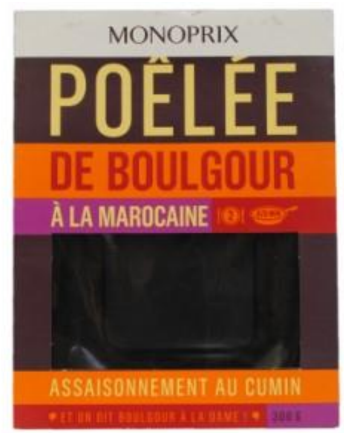
Valbona Italian Grilled and Flavoured Eggplant (Italy)

Valbona Melanzane Italiane Insaporite e Grigliate (Italian Grilled and Flavoured Eggplant) is now available. The product is said to be made from the best ingredients from Italian territory while the company is claimed to respect the environment, and the business is run ethically. The product retails in a 335g pack.

Claims:
Ethical - Environmentally Friendly Product

Monoprix Moroccan-Style Bulgur & Vegetables for Frying (France)

Monoprix Poêlée de Boulgour à la Marocaine (Moroccan-Style Bulgur & Vegetables for Frying) are new to the range. This product has a cumin seasoning, can be microwave or pan heated, and retails in a partly recyclable 300g pack with two servings.



Claims:
Ethical - Environmentally Friendly Package, Microwaveable

Aurora Mediterranean Quinoa Mix (Canada)

Aurora Mediterranean Quinoa Mix is made with wholegrain quinoa and natural ingredients. The microwaveable product is free from gluten, cooks in 15 minutes and retails in a 136g pack.

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

Source: Mintel (2014)

Australian Launch:
L3M (October – December 2014)

Yumi's Mediterranean Eggplant Classic Dip

Yumi's Mediterranean Eggplant Classic Dip has been repackaged and is now available in a newly designed 200g pack. The kosher certified dip is described as toasted eggplant blended with zesty lemon juice, herbs, spices, and creamy whole egg mayonnaise. This product is free from dairy and gluten, and is said to have an outstanding combination of flavours

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

Mediterranean Delite Babaghanouge Dip

Mediterranean Delite Babaghanouge Dip is now available. The product retails in a 200g pack featuring a HACCP certified logo.

Claims:
No information available

Zucchini.

Purchase and consumption frequency of zucchini continued to trend upward in Wave 19, after notable gains across recent waves.

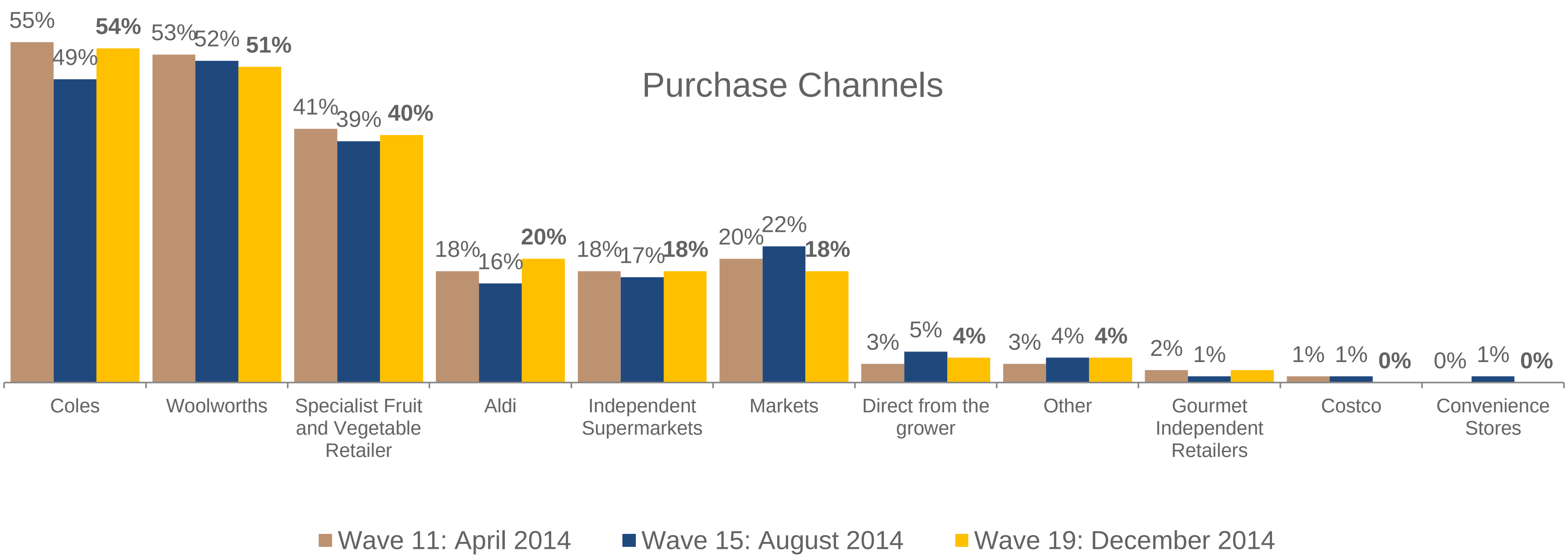
Mainstream retailers remained the preferred purchase channel for around half of consumers. A considerable number of consumers also purchase from specialist retailers.

Average Purchase **3.5** times per month

- ▼ 3.2 times, Wave 11
- ▼ 3.4 times, Wave 15

Average Consumption **7.3** times per month

- ▼ 6.4 times, Wave 11
- ▼ 7.1 times, Wave 15



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 11 N=302, Wave 15 N=335 and Wave 19 N=357

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

Average Spend and Price Sensitivity

Average weight of purchase

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

- 700g, Wave 11
- 700g, Wave 15

Recalled last spend

The average recalled last spend was **$3.10**, showing a slight reduction over the previous wave.

- ▼ $2.80, Wave 11
- ▲ $3.20, Wave 15

Value for money

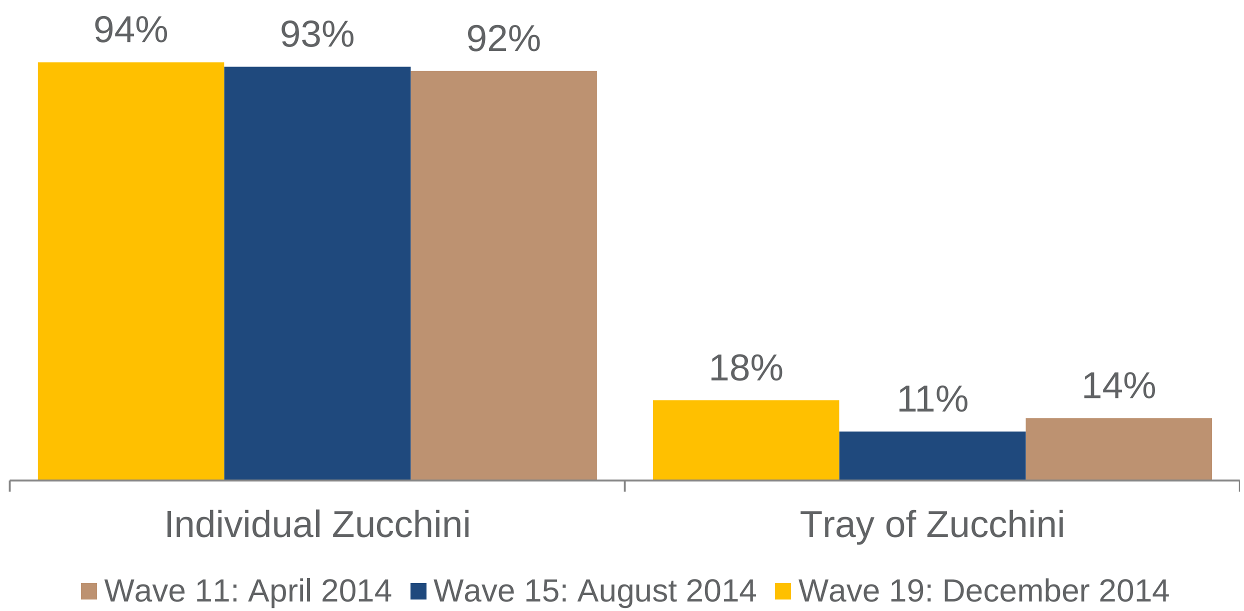
On average, consumers perceived Zucchini to be good value for money **(6.5/10)**, representing a large increase over the previous waves.

- ▼ 6.2/10, Wave 11
- ▼ 6.2/10, Wave 15

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 11 N=302, Wave 15 N=335 and Wave 19 N=357

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

This month saw an increase in the purchase of zucchini trays, however individual zucchinis remain the most common format purchased.

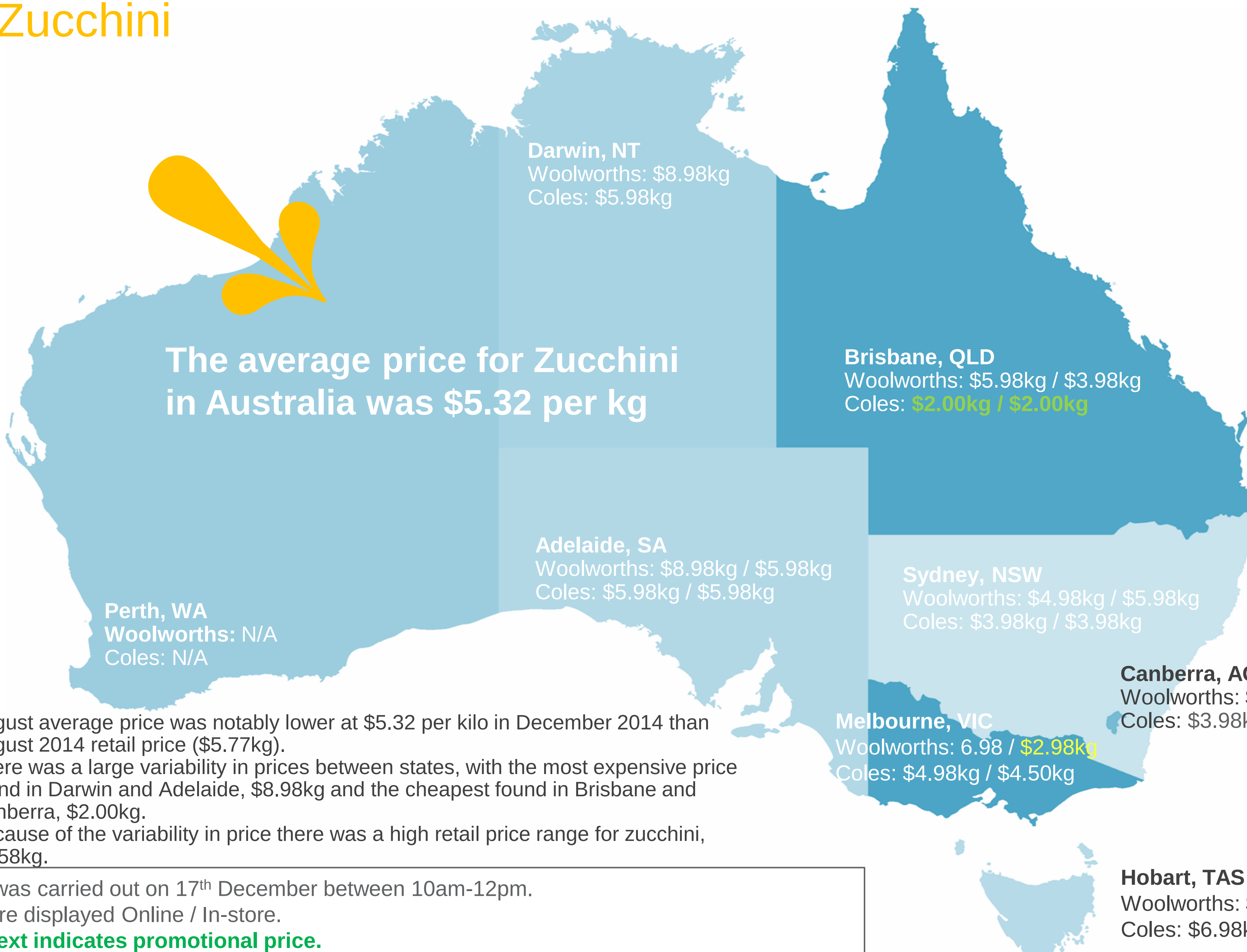


	Individual	Tray
Wave 11	3.0	1.9
Wave 15	3.2	2.1
Wave 19	3.0	3.3

Q3a. How much <commodity> does this typically equate to?
Sample Wave 11 N=302, Wave 15 N=335 and Wave 19 N=357

Online and In-store Commodity Prices

Zucchini

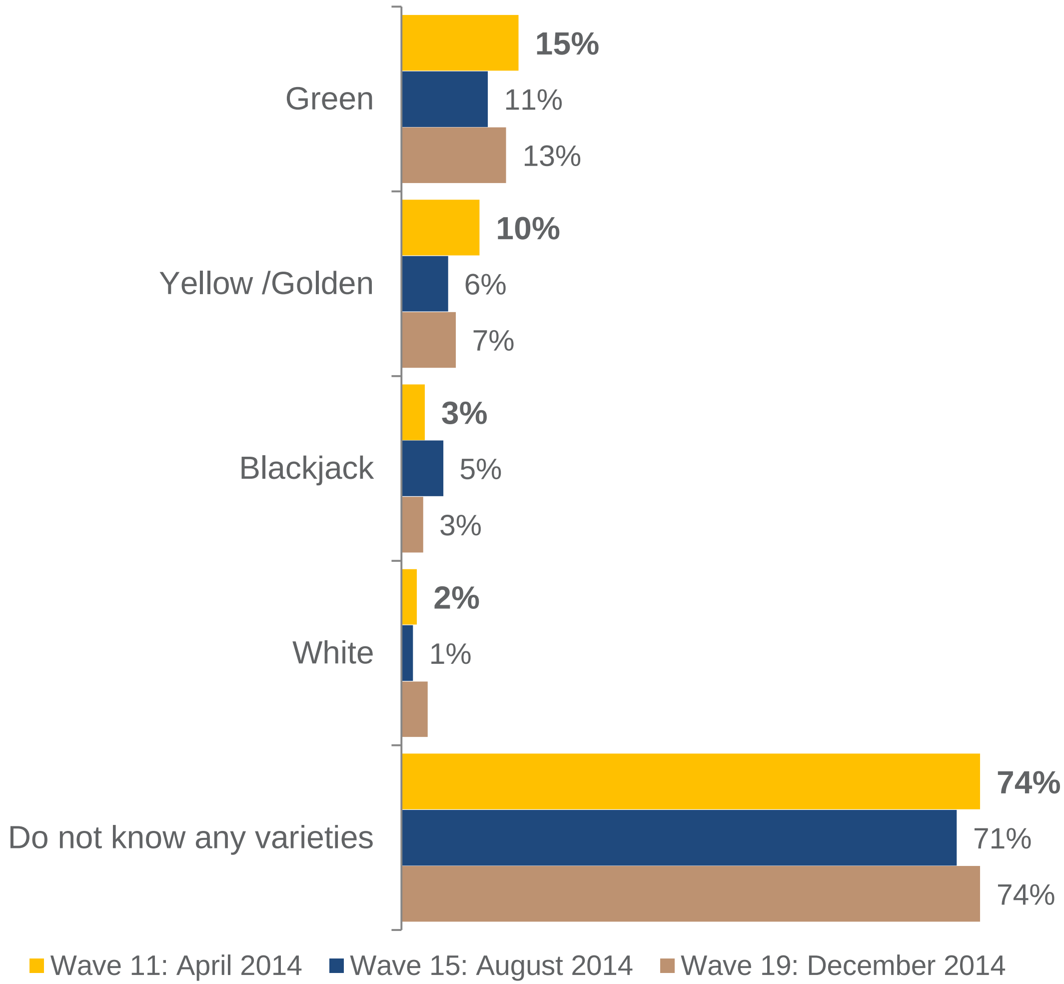


- August average price was notably lower at $5.32 per kilo in December 2014 than August 2014 retail price ($5.77kg).
- There was a large variability in prices between states, with the most expensive price found in Darwin and Adelaide, $8.98kg and the cheapest found in Brisbane and Canberra, $2.00kg.
- Because of the variability in price there was a high retail price range for zucchini, $7.58kg.

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

Overall, awareness of Zucchini varieties remains very low.

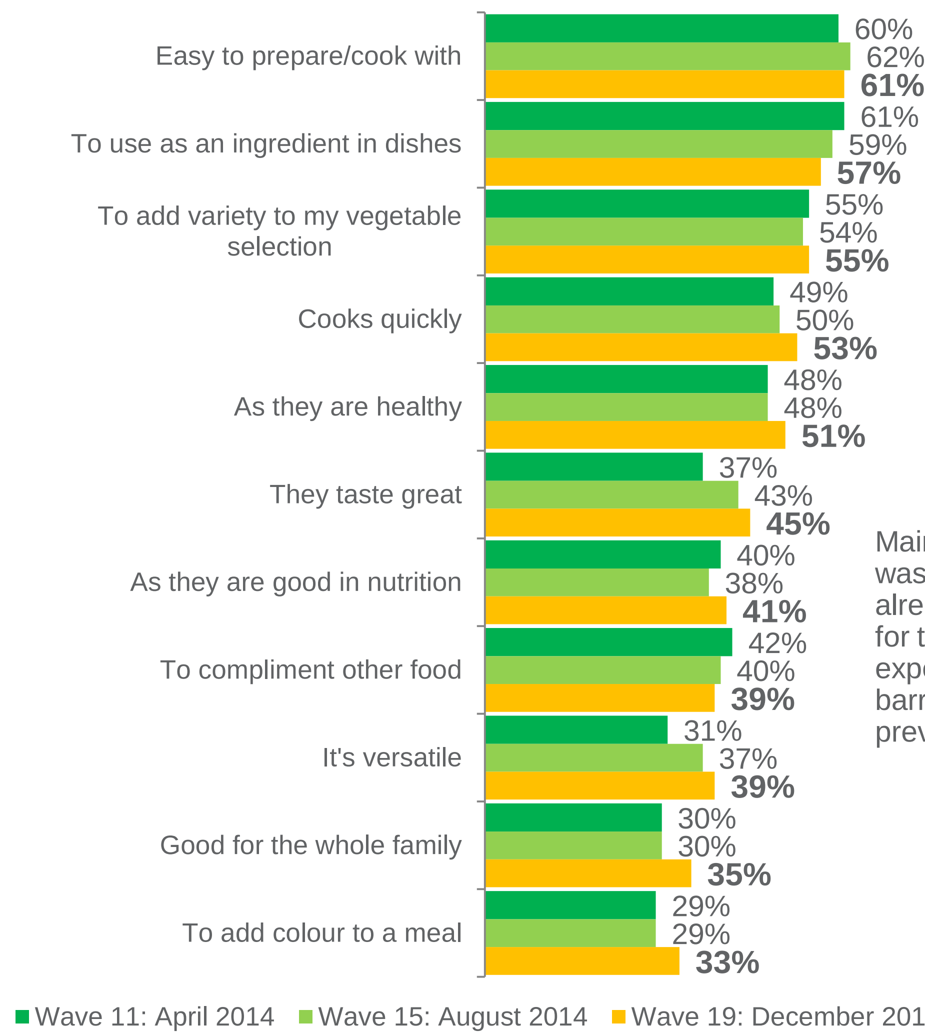
Consumers who recalled types of zucchinis did so mainly by colour, with green the highest awareness consistent across waves.



Sample Wave 11 N=302, Wave 15 N=335 and Wave 19 N=357
Q6a. What varieties of <commodity> are you aware of? (unprompted)

Triggers & Barriers to Purchase

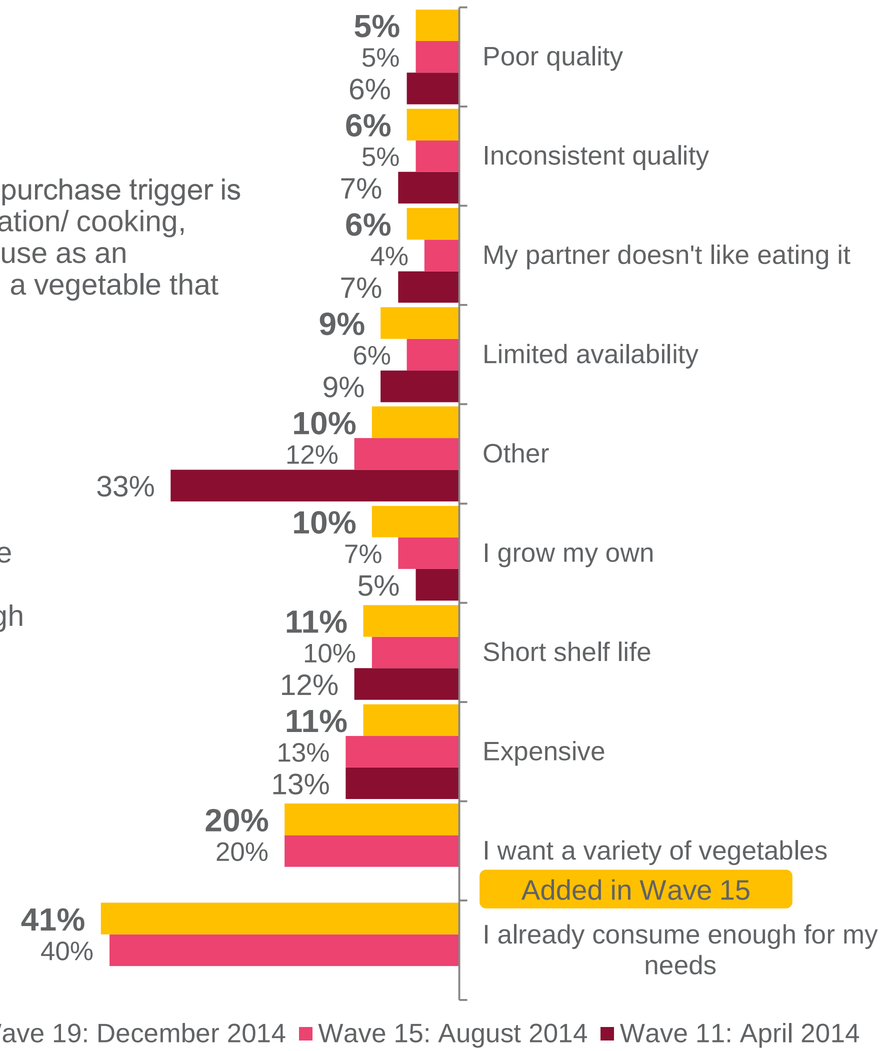
Triggers



Zucchini's key purchase trigger is ease of preparation/ cooking, followed by its use as an ingredient, and a vegetable that adds variety.

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

Barriers



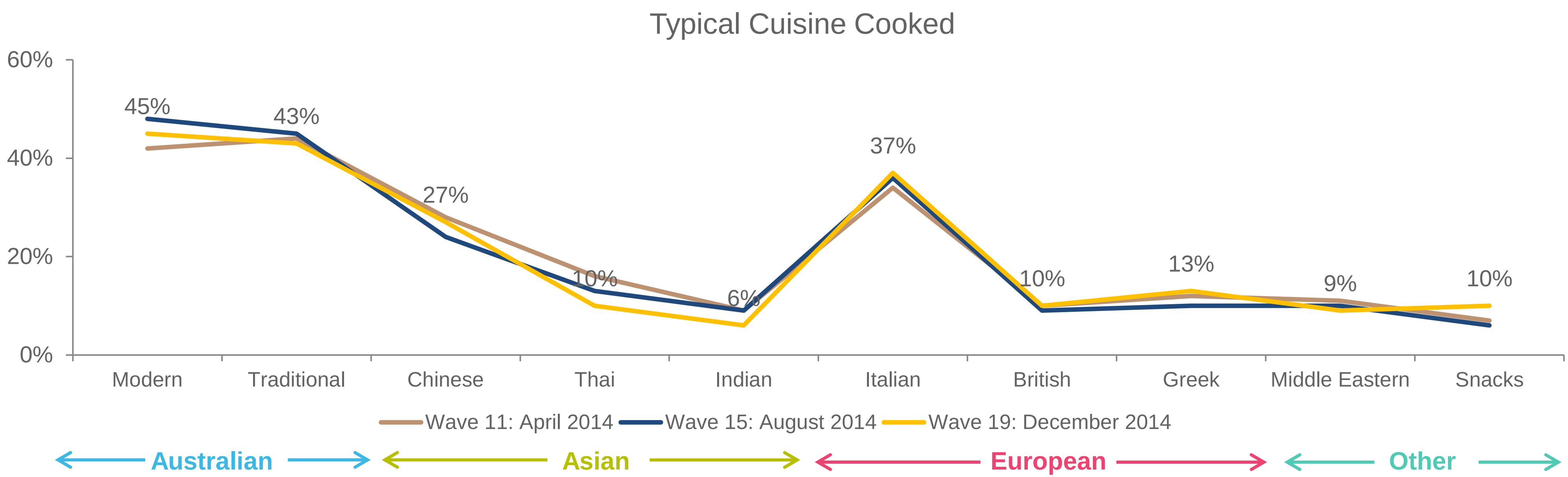
Sample Wave 11 N=302, Wave 15 N=335 and Wave 19 N=357
Q7. Which of the following reasons best describes why you purchase <commodity>?
Q8. Which reason best describes why you don't buy <commodity> more often?

Consumers prefer to cook zucchinis in Australian and Italian cuisine, with the former experiencing small declines over the previous wave.

The main consumption occasion for zucchinis are weekday dinners, which maintained a considerable preference over other consumption occasions.

Wave 19 Top 5 Consumption Occasions

	Wave 19	Wave 15	Wave 11
Weekday Dinner	**59%**	58% ▼	53% ▼
Weekend Dinner	**37%**	41% ▲	32% ▼
Family meals	**36%**	38% ▲	39% ▲
Quick Meals	**34%**	28% ▼	35% ▲
Every-day	**30%**	32% ▲	29% ▼



Sample Wave 11 N=302, Wave 15 N=335 and Wave 19 N=357
Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?

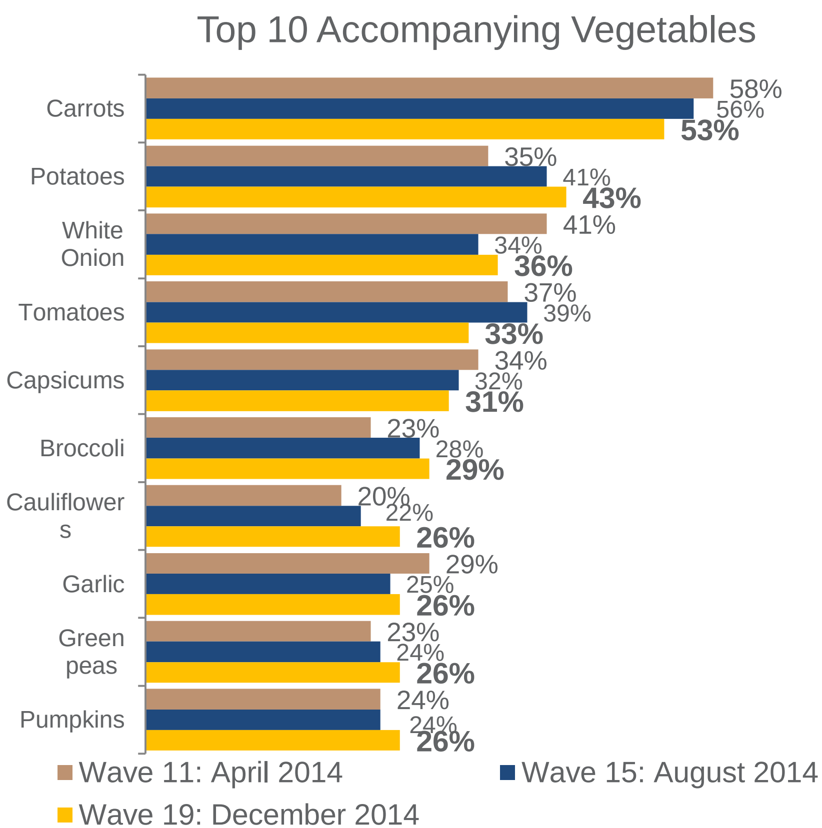
Horticulture Innovation Australia

colmar brunton.

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

Consumption of zucchini with carrots continues to decline, yet still remains the most popular accompanying vegetable. Potatoes continue to increase in popularity, with an upward trend continuing through recent waves.

Stir-frying remains the main cooking technique used. Steaming continues to be popular, while soup is in decline, on par with the change in season.

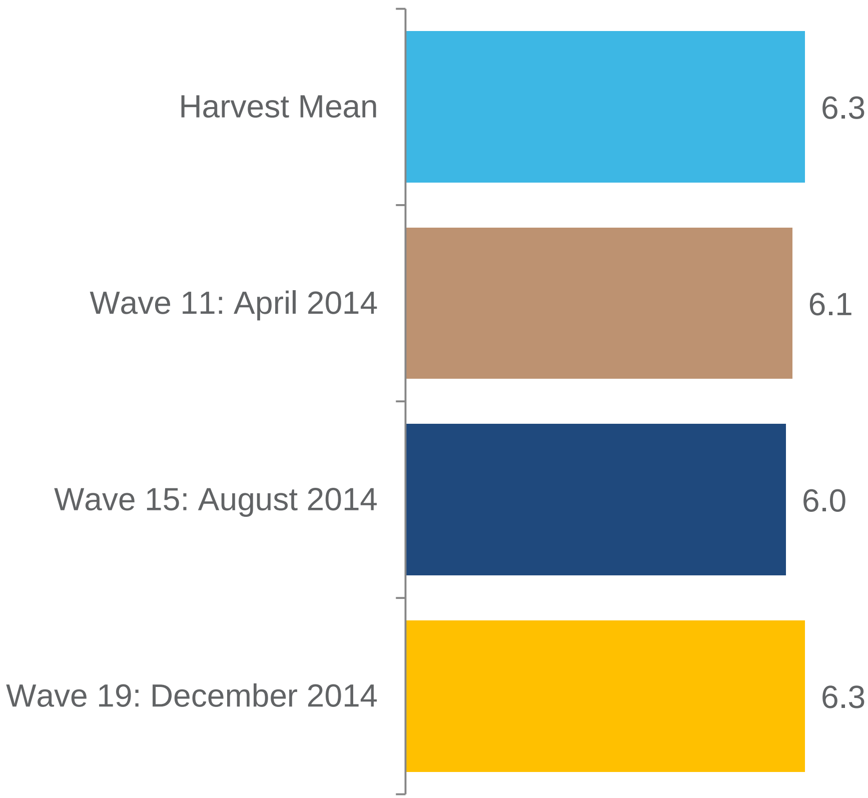


Top 10 Cooking Styles

	Wave 11	Wave 15	Wave 19
Stir frying	55%	51%	**55%**
Steaming	38%	35%	**40%**
Sautéing	25%	21%	**28%**
Roasting	25%	22%	**27%**
Grilling	16%	19%	**22%**
Baking	26%	30%	**22%**
Microwave	16%	15%	**20%**
Raw	12%	10%	**17%**
Boiling	12%	16%	**17%**
Soup	30%	23%	**17%**

Sample Wave 11 N=302, Wave 15 N=335 and Wave 19 N=357
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?

Provenance is more important to consumers in the most recent wave, experiencing a sharp increase, bringing it in line with the Harvest mean.



Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 11 N=302, Wave 15 N=335 and Wave 19 N=357

Consumers expect zucchini to remain fresh for just under eight days, which is down on the previous wave.

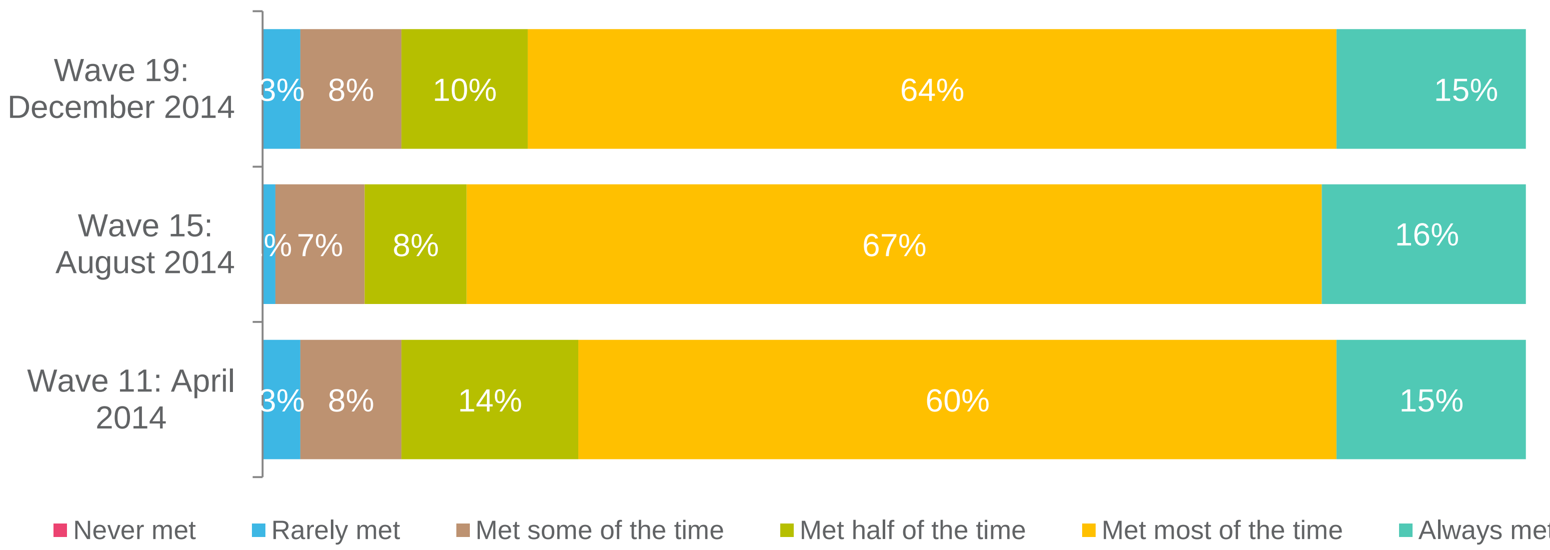
Expectations of freshness also saw a decline, yet almost four in five consumers had their expectations met at least most of the time.

Expected to stay fresh for **7.8** days

▲ 8.2 days, Wave 11

▲ 8.1 days, Wave 15

Expectations Met



Sample Wave 11 N=302, Wave 15 N=335 and Wave 19 N=357

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.

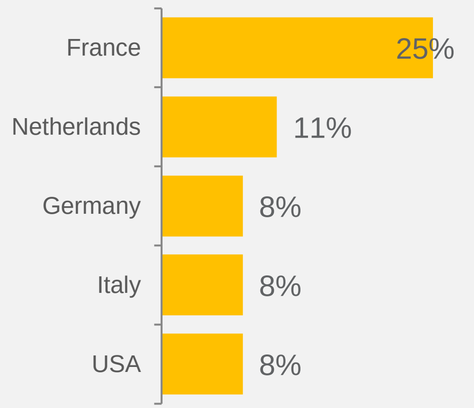
Trends: Zucchini

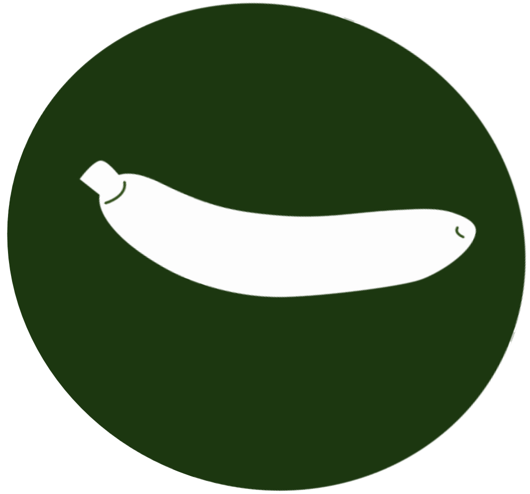
Zucchini Global NPDs

October - December 2014

There were 160 zucchini products launched in the last three months. The majority of launches occurred in Europe, and specifically France. Key categories for launches were meals, fruit & vegetables and soup.

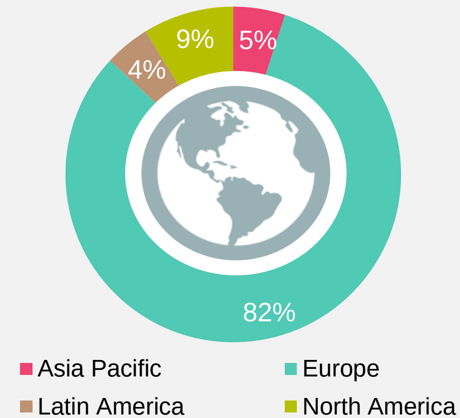
Country



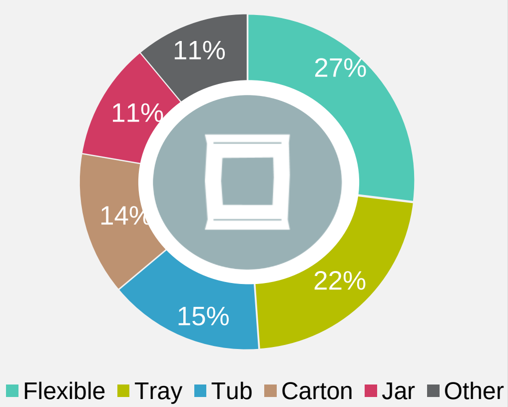


160 Global Launches

Region



Top Pack Formats



Categories

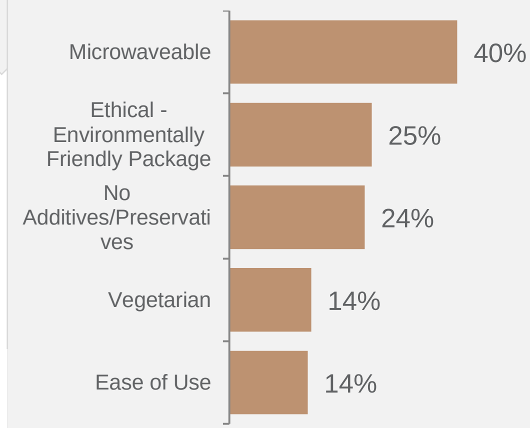
Meals 40%

Fruit & Vegetables 14%

Soup 13%

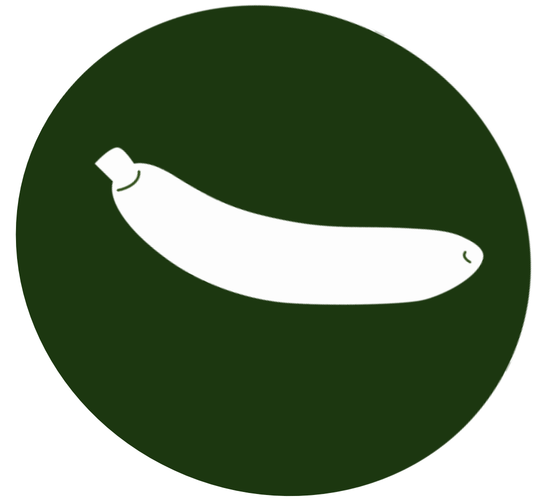
Sauces & Seasonings 7%

Top Claims



Zucchini Product Launches:
L3M (October – December 2014)
Summary

- There were 160 products launched globally in the last three months. This was somewhat lower than previous trends.
- Domestically, there was only 1 product launched that contained zucchini as an ingredient.
- Launches predominantly occurred in Europe (82%) and some in North America (9%).
- The most common packaging used for launches were flexible (27%) and tray (22%) formats.
- Meals (40%), fruit & vegetables (14%) and soup (13%) were the main categories for launches.
- Microwavable (40%) remained the most common claim used for products. Environmentally friendly packaging (25%) and no additives/preservatives (24%) were also frequently used.
- The most innovative products launched were stuffed zucchini and friable vegetable mix (examples of these can be found in the following pages).

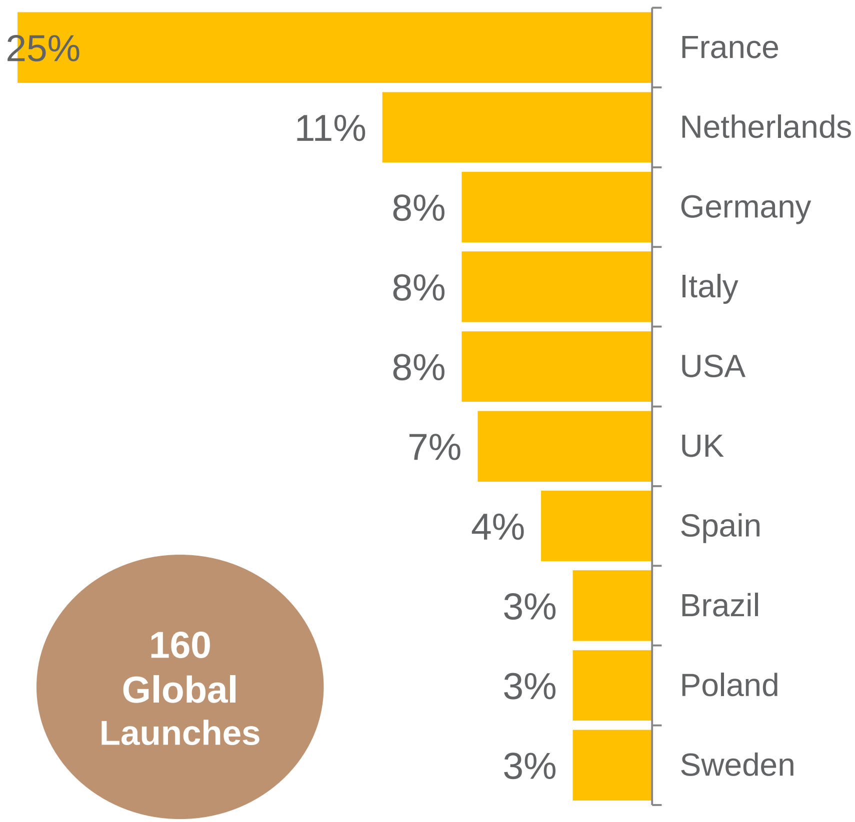


Source: Mintel (2014)

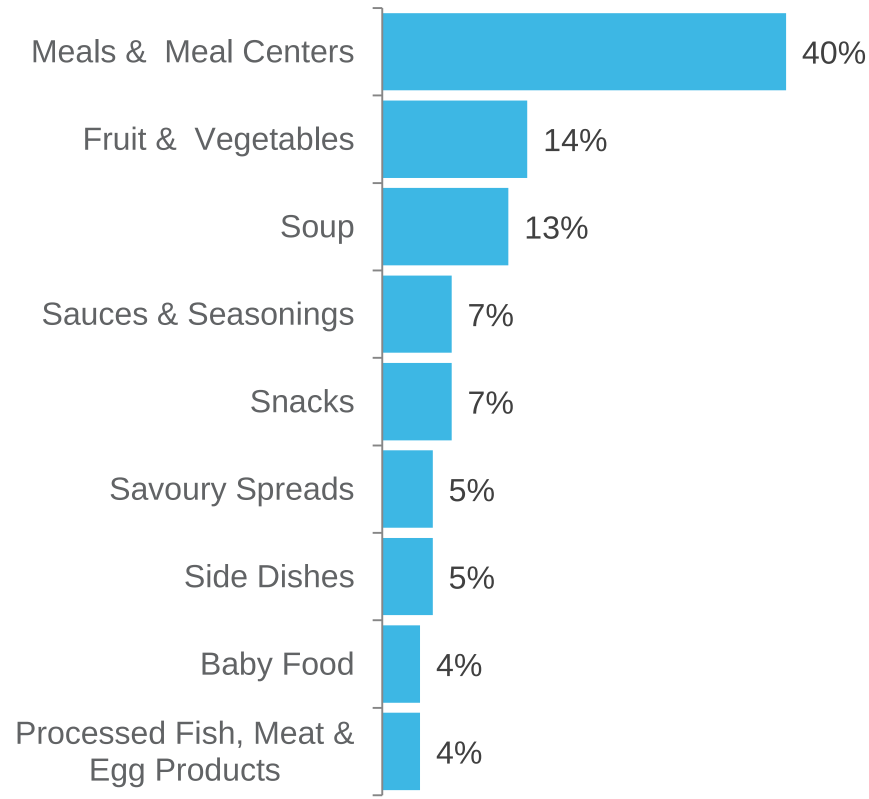
Zucchini Launches

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

Top Launch Countries



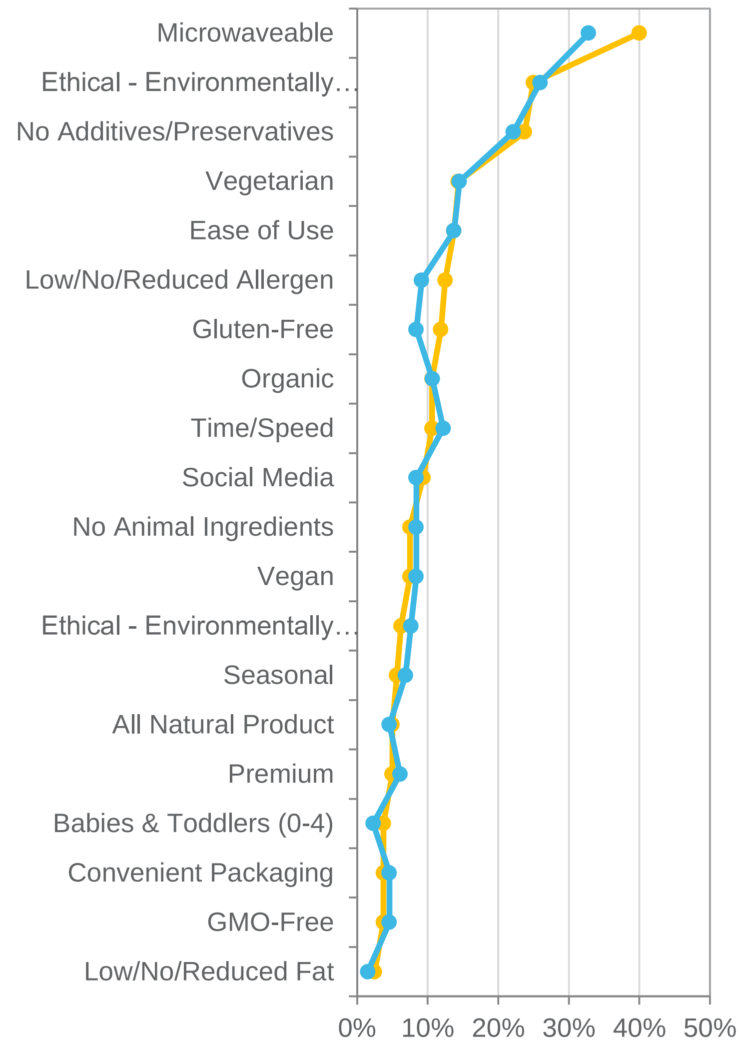
Top Launch Categories



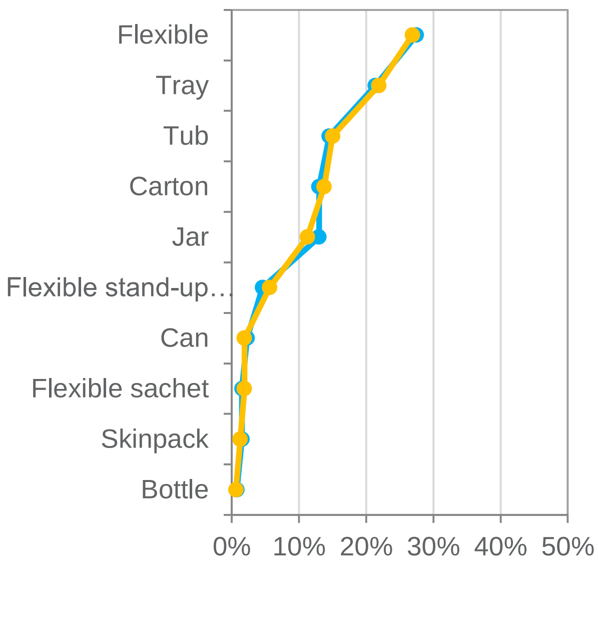
Zucchini Launches

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

Top Claims Launched



Top Pack Formats Launched



Only regions with n >30 are displayed

Innovative Zucchini Launches:
L3M (October – December 2014)

Mini Agnesi Spinach & Zucchini Treccine Pasta (Switzerland)

Mini Agnesi Épinards et Courgettes Treccine Pasta (Spinach & Zucchini Treccine Pasta) comprises 25% vegetable purée and is suitable for both adults and children from three years onwards. This product retails in a 400g pack, featuring the FSC logo, and a children game.

Claims:
Convenient Packaging, Ethical - Environmentally Friendly Package, Children (5-12)

M Classic Contadino Style Pizza (Switzerland)

M Classic Contadino Style Pizza (Contadino Style Pizza) is a pizza topped with bacon, sour cream, tomatoes and zucchini. This product retails in a 355g pack featuring the FSC logo.

Claims:
Ethical - Environmentally Friendly Package

Veres Courgette Spread (Ukraine)

Veres Ikorka Kabachkova (Courgette Spread) has been repackaged in a newly designed 300g convenient pack. This spread is made with the highest quality ingredients and is free from preservatives and GMOs. The product is said to save consumer's time and is ideal as it is, on bread or with pasta, rice, meat or poultry.

Claims:
No Additives/Preservatives, GMO-Free, Time/Speed, Convenient Packaging

Picard Les Entrées Scallop & Baby Vegetable Duos (France)

Picard Les Entrées 2 Duos de Saint-Jacques et Petits Légumes (Scallop & Baby Vegetable Duos) are now available. This product comprises scallops, creme fraiche, carrot, courgette and celery and retails in a partly recyclable 160g pack containing two units.

Claims:
Ethical - Environmentally Friendly Package

Source: Mintel (2014)

Innovative Zucchini Launches:
L3M (October – December 2014)

Garden Lites Zucchini Soufflé (USA)

Garden Lites Zucchini Soufflé is now available in a redesigned and recyclable 7-oz. pack, featuring Facebook and Twitter links. This kosher certified product is made with fresh zucchini, whipped egg whites and delicately seasoned. The microwavable soufflé is free of gluten, dairy, soy and nuts, and features a Weight Watchers PointsPlus value of four.

Claims:
Low/No/Reduced Allergen, Kosher, Ethical - Environmentally Friendly Package, Slimming, Microwaveable, Gluten-Free, Social Media

Nestlé Junior Zucchini, Potato & Chicken Purée (Brazil)

Nestlé Junior Purezinho de Abobrinha, Batata e Frango (Zucchini, Potato & Chicken Purée) has been repackaged in a newly designed pack. This microwavable gluten-free product is suitable for children from 12 months old onwards, and rich in iron. It features a delicate flavour and retails in a 250g pack.

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

Renifer Vegetable Mix with Potatoes for Frying (Poland)

Renifer Warzywa na Patelnie z Ziemniakami (Vegetable Mix with Potatoes for Frying) is now available. The product can be prepared in just ten minutes, and served with sausage or bacon. It retails in a 450g pack.

Claims:
Time/Speed

Deluxe Risotto with Vegetables (Denmark)

Deluxe Risotto med Grøntsager (Risotto Rice with Vegetables) is now available. This mix of rice and vegetables can be cooked in 16-18 minutes and retails in a 300g pack that provides three to four servings.

Claims:
Premium

Source: Mintel (2014)

Innovative Zucchini Launches:
L3M (October – December 2014)

Jumbo Chèf Gourmet Courgette Cubes (Netherlands)

Jumbo Chèf Gourmet Courgette Blokjes (Courgette Cubes) are now available. The product retails in a 150g pack.

Claims:
No information available

ICA Gott Liv Grönhydrater Zucchini Pasta (Sweden)

ICA Gott Liv Grönhydrater Zucchini Pasta is described as a green, tasty and energy efficient alternative to regular pasta. This product has a cooking time of approximately three minutes and retails in a 250g pack.

Claims:
Low/No/Reduced Calorie

Earth's Best Organic Mini Meals Sesame Street Elmo Pasta (Hong Kong)

Earth's Best Organic Mini Meals Sesame Street Elmo Pasta with Meat Sauce & Vegetables is free from hydrogenated oils, artificial flavours, colours and preservatives. The USDA organic certified product is said to be an excellent source of protein and contains 2g dietary fiber per serving.

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

Traiteur Sétois Stuffed Zucchini (France)

Traiteur Sétois Courgettes Farcies (Stuffed Zucchini) are now available. This product retails in an 800g pack containing four units.

Claims:
No information available

Source: Mintel (2014)

Australian Zucchini Launches:
L3M (October – December 2014)

Woolworths Select Low Fat Homestyle Lamb & Barley Soup

Woolworths Select Low Fat Homestyle Lamb & Barley Soup is new to the range. This Australian made soup contains no artificial colours, flavours, or preservatives and comprises a tomato base with visible lamb and vegetable chunks, barley and specks of herbs and spices. This microwavable product retails in a 300g pack, enough to serve one.

Claims:
Ease of Use, No Additives/Preservatives, Seasonal, Low/No/Reduced Fat, Microwaveable

In the Media.

General Vegetable News
(October – December 2014)

- Supermarket giant Woolworths has introduced ‘The Odd Bunch’, a collection of fresh fruit and vegetables that might look less than perfect, and are sold at a cheaper price.
- Taking the trend towards ‘local’ food to a new level, new national consumer research examining where Australians typically shop for their fresh vegetables has found that 14 per cent of survey respondents typically buy their vegetables at a farmers’ market.
- There are more Australian Vegetables to hit Asian markets with containers left for Singaporean and Taiwanese shores, following the industry’s most successful Reverse Trade Mission in June 2014, involving over 40 leading Asian buyers and retailers.

Source: Australian Food News

Commodity News
(June – August 2014)

- In January 2015, Alion Vegetables and Fruit (Cyprus) shows two world premiers at the trade show: square eggplants and the new variety of eggplant Baby striped aubergine. Their taste is great and exceptional with their creamy flesh becoming rich and fruity with a melting quality when cooked.

http://www.freshplaza.com/article/133398/Square-and-baby-Eggplants

- Researchers in Isfahan University of Medical Sciences have reported possible effect of mountain celery extract on prevention of hypertension. The researcher said "we found that the extract reduced the hypertension; it also reduced the circulatory H2O2 and dexamethasone-induced weight loss in all prescribed doses".

http://en.mehrnews.com/detail/News/105261

- Cucumbers are rich in vitamin K, copper, potassium, vitamin C and manganese and can help avoid a number of nutrient deficiencies; fights inflammation, reduces cancer risk, helps in digestion and helps heart health.

http://www.thenewage.co.za/148432-12-53-Why_cucumber_is_a_must_in_your_diet

- 2014 featured a creative way of eating zucchini as spaghetti. The Zucchini is, extruded through a vegetable spiralizer into long, curling strands of raw vegetable goodness. These "zuudles," says Sherry Strong, nutritionist and self-branded "food philosopher," can double for traditional pasta in a heartbeat

http://www.goodfood.com.au/good-food/cook/recipe/zucchini-spaghetti-20141111-3k1ug.html

Thanks.