Project Harvest Monthly Tracker Report.

Wave 29, October 2015

Vegetables tracked: Pumpkin, Carrots, Cauliflower, Beans, Baby Broccoli, Parsley & Silverbeet

This project has been funded by Horticulture Innovation Australia using the vegetable levy and funds from the Australian Government.

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Wave 29:
Executive Summary

Industry Insight

The current wave of Project Harvest revealed that approximately one third of consumers limit their purchase of vegetables based on not wanting to waste any. Previously, the consumption tracker has revealed that approximately 6% of vegetables purchased are wasted and that 34% of us don't believe we can reduce our wastage further.

In a broader context, the study of trends in consumer sentiment, based on society moving from one era to another in a repetitive cycle, has revealed a growing shift towards an extroverted and assertive era commonly labelled as "rebellion". In food trends, this signals an era of "less" over the next 3-5 years: less clutter, less energy consumption and **less waste**.

Industry Insight cont.

So in this era of "**less**" what can the vegetable industry do to ensure it is delivering to consumer needs? 36% of consumers suggest that the longevity, freshness and shelf-life of the fresh produce they buy could be increased; 27% suggest the availability of smaller portions and 17% want to know alternative uses for the produce they discard.

Actioning this through Best Before dates, shorter time to shelf, specific storage and usage information at point of purchase, as well as smaller or customised portions are all ideas that can be built upon to help reduce the proportion of consumers who feel helpless against waste, as well as the amount of waste itself.

Beans Grower Action Plan.

Wave 29 Fast Facts – Beans

- Beans had a strong level of endorsement and recommendation to family and friends, in line with the Vegetable Average. Importance was higher than the average of the vegetables tracked thus far.
- Beans are purchased around 4 times per month and are consumed 9 times per month, both slightly lower than the previous wave.
- Consumers purchase 610g of beans per shop. Recalled last spend is $3.40. Overall, consumers perceive beans to be good value for money.
- National price tracking indicated the average price for green beans in October was $5.60 per kg.
- Awareness of bean types have increased for several varieties this wave, but awareness is still low overall. Broad remained the most recalled type of Bean, followed by Green and Runner.
- Beans are expected to stay fresh for just over a week, and freshness expectations are met most of the time.
- Health and ease of preparing are the main influences on purchase of beans. Already consuming enough and wanting a variety of vegetables are the primary barriers to purchase.

$5.60 was the national retail average in October 2015.

1.

Insight:

Freshness expectations are consistently increasing across waves. However, some consumers limit their purchase due to wastage concerns.

Short Term Recommendation:

Promote correct storage instructions for consumers at point of sale – this will assist with longevity of freshness in the home. Best before dates on packaging will minimise wastage concerns.

2.

Insight:

Ease of preparation is a key trigger to purchase. Quick meal occasions with beans are increasing across waves.

Long Term Recommendation:

Provide recipe ideas at retail channels to promote a repertoire of quick meals that contain beans. This also provides a new product development opportunity to create products that are pre-prepared and appeal to convenience cooks.

Carrot Grower Action Plan.

Wave 29 Fast Facts – Carrots

- Importance of carrots was low again this wave, however consumers are satisfied with the range available. Future purchase of carrots looks to remain stable.
- Carrot is purchased approximately 4 times per month. Consumption of carrot occurs 15 occasions per month, around once every second day.
- On average, consumers purchase 1.2kg of carrot. Recalled last spend was $2.30. Overall, consumers perceived very good value for money.
- National price tracking indicated the average price for carrots in October was $2.44 per kg, which was reasonably consistent between state and retailers.
- Awareness of carrot types remains low, with nearly two thirds of consumers unable to recall a type of carrot. Colour is the main trigger for unprompted carrot variety awareness.
- Carrots are expected to remain fresh for over 12 days and generally being met.
- Health and taste are the key triggers to purchase. The main barriers to future purchase are consuming enough and not wanting to waste any.

50% of consumers consumed carrots as a quick meal.

1.

Insight:

There is little change in cuisines cooked involving carrots across previous months.

Short Term Recommendation:

Inspire consumers with recipe and cuisine ideas, steering away from typical Australian dishes. Cuisines such as Middle Eastern and Vietnamese, which include fresh and healthy dinners, may trigger future purchase of carrots.

2.

Insight:

Carrots are increasingly consumed raw. One third of consumers are eating carrots as snacks.

Long Term Recommendation:

With the growth of the snack market in Australia, there is an opportunity to further position fresh vegetables, especially carrots, as a great snack option. Providing pre-prepared batons and positioning in the snack/dips aisles would keep carrots at the top of consumers' minds.

Cauliflower Grower Action Plan.

Wave 29 Fast Facts – Cauliflower

- Cauliflower holds low importance to consumers and there is little interest in new varieties. The majority of consumers indicate that their purchase of cauliflower will remain stable in the future.
- Purchase of cauliflower occurs 3 times per month and is consumed over 8 times per month. Purchase is typically from mainstream retailers.
- Overall, cauliflower is perceived to be good value for money (6.6/10). Consumers on average purchase 1.0kg, with recalled last spend at $3.30.
- Price tracking for October 2015 revealed an average price of $3.35 each, with the cheapest price found in Melbourne at $2.00 each.
- Spontaneous recall remains very low for cauliflower, however consumers were slightly more aware of white varieties this wave.
- Taste and ease of preparation are the strongest triggers to purchase, while already consuming enough and not wanting to waste any are the two biggest barriers.
- Consumers expect cauliflower to remain fresh for nine days, with expectations of freshness largely met.

6.6/10 consumers perceived cauliflower to be good value for money

1.

Insight:

The main barrier to cauliflower purchase is consumers' perception of eating enough to balance their diet.

Short Term Recommendation:

Promoting the versatility and health benefits of will encourage greater use across meals, as well as a replacement for other products, such as cauliflower bread, rice, pizza crust and tortillas.

2.

Insight:

Roasting cauliflower is increasing in popularity as a cooking style.

Long Term Recommendation:

Investigate ready-to-roast pre-prepared cauliflower options, such as mixed trays paired with potatoes, carrots and pumpkin.

Pumpkin Grower Action Plan.

Wave 29 Fast Facts – Pumpkin

- Consumers are satisfied with the range of pumpkin available and overall has high levels of consumer sentiment.
- Purchase and consumption frequency of pumpkin both declined, with approximately 8 consumption occasions per month. Purchase is mainly from mainstream and specialist retailers.
- Consumers on average are purchasing 1.2kg of pumpkin. Recalled last spend is $3.30.
- Price tracking revealed a national average of $3.76 per kg for butternut pumpkins, an increase from prices in June 2015 ($2.60 per kg).
- Awareness of pumpkin remains high, with positive recall across multiple types of pumpkin. Awareness of Butternut and Japanese pumpkin has steadily increased across waves.
- Taste and ease of preparation are the key influences to purchase. Barriers to purchase include already consuming enough for their needs and not wanting to waste any.
- Consumers expect pumpkin to remain fresh for over 11 days once purchased. These expectations are in line with previous waves and are generally met.

80% of consumers eat pumpkin during dinner.

1.

Insight:

Consumers predominately cook Australian cuisines when using pumpkin.

Short Term Recommendation:

Consumers' lack of cuisines may be inhibiting the purchase of pumpkin, as consumers lack the knowledge of cooking multiple dishes. Provide recipe ideas, highlighting the flavour of the dish and the taste that pumpkin will add. This will become a driver of purchase.

2.

Insight:

Increase in purchase of half and quartered pumpkin formats.

Long Term Recommendation:

The popularity of cut up pumpkin should be further investigated – whether it is driven by availability or more suitable portion sizes. Understanding of drivers will provide better direction on product opportunities.

Baby Broccoli Grower Action Plan.

Wave 29 Fast Facts – Baby Broccoli

- There is a high level of endorsement for Baby Broccoli, with consumers likely to recommend to family and friends. Consumers are also satisfied with the range of Baby Broccoli available.
- Purchase of baby broccoli occurs around 3 times per month and it is consumed 7 times per month. Purchase is typically from mainstream retailers.
- Consumers on average purchase 0.5kg, typically bunched. Recalled last spend is $3.60.
- Price tracking revealed an average price of $2.70per bunch, relatively consistent with the past wave.
- 86% of consumers were unaware of any varieties of baby broccoli.
- Health, ease of preparation and taste are the strongest triggers to purchase, whilst price and wanting a variety of vegetables are the two biggest barriers.
- Consumers expectations of freshness are largely met, but this has declined since the previous wave.

6.8 times per month is the average number of times baby broccoli is consumed per month.

1.

Insight:

A decline in both purchase and consumption this wave suggests that baby broccoli is perceived to be more suitable to winter.

Short Term Recommendation:

Provide consumers with recipe ideas and cooking techniques at point of sale to encourage purchase during the summer season, such as salad and fresh stir-frys.

2.

Insight:

Consistent with last wave, there are no new product development launches that contained baby broccoli.

Long Term Recommendation:

Investigate product development opportunities. Focus on healthy, convenient products, that trigger baby broccoli purchase.

Silverbeet Grower Action Plan.

Wave 29 Fast Facts – Silverbeet

- Consumers are somewhat satisfied with silverbeet, sitting just below the Vegetable Average. One fifth of consumers indicated that they will purchase more in the future, with silverbeet having high levels of endorsement.
- Purchase of silverbeet occurs around 3 times per month and is consumed 7 times per month. Purchase is typically from mainstream retailers and also specialist retailers.
- Consumers on average are purchasing 0.8kg of silverbeet. Recalled last spend is $3.40.
- Price tracking for October 2015 showed the national average as $3.73 per bunch for silverbeet, a slight decline since June 2015.
- Spontaneous awareness for silverbeet is low, with the highest recall for rainbow/ coloured/Swiss silverbeet.
- Health and taste are the key influences to purchase. Barriers to purchase included consuming enough for their needs and not wanting to waste any.
- Consumers expect silverbeet to remain fresh for just under a week once purchased, and these expectations are generally met.

6 days is the number of days silverbeet is expected to stay fresh.

1.

Insight:

Silverbeet is typically cooked in modern and traditional Australian cuisines and consumed at dinner.

Short Term Recommendation:

Provide lunch and quick meal recipe ideas outside typical Australian cuisines, such as Mediterranean cooking, while also highlighting the versatility and ease of preparing silverbeet.

2.

Insight:

Inconsistency of quality and freshness have resulted in consumers perceiving silverbeet to be less value for money this wave.

Long Term Recommendation:

Determine optimal displays to retain freshness, including refrigeration and packaging of silverbeet. Inform consumers on ideal storage at home to increase longevity of freshness.

Parsley Grower Action Plan.

Wave 29 Fast Facts – Parsley

- Parsley has strong levels of consumer sentiment across all metrics of importance, satisfaction, endorsement and interest in new varieties, consistent with the previous wave.
- Purchase of parsley occurs nearly 4 times per month and is consumed 10 times per month. Purchase is typically from mainstream retailers.
- Consumers on average purchase 0.2kg, typically per bunch. Recalled last spend is $2.80.
- Price tracking revealed an average price of $2.71 per bunch in October 2015.
- Spontaneous awareness of Parsley remains relatively high, with most consumers able to recall Flat Leaf/ Italian/Continental Parsley and Curly Leaf Parsley.
- Using as an ingredient in dishes, complementing other food and adding colour to meals remain the strongest triggers to purchase, while not wanting to waste any and growing their own are the two biggest barriers.
- Consumers expect parsley to remain fresh for just over a week. Expectations of freshness are largely met.

37% of respondents used parsley when cooking a new recipe.

1.

Insight:

Whilst expense has declined as a barrier to purchase due to various sales promotions across states and retailers, consumers do not perceive parsley to be good value for money.

Short Term Recommendation:

Promote parsley's versatility across cuisines and dishes, as well as longevity of freshness as this should increase value for money perceptions and satisfaction.

2.

Insight:

Parsley is mainly being used as a garnish to complement other food, however consumers are more willing to use parsley when cooking new recipe dishes.

Long Term Recommendation:

Consumers are comfortable experimenting with parsley. Investigate new product opportunities that hero the parsley, such as pestos and pastes – big and full flavours will appeal to these adventurous cooks.

Wave 29:
Response to Ad hoc Questions

Perceptions of Retailers

Specialty fruit and vegetable retailers are perceived to have the best quality, value and choice for fresh vegetables.

Coles and Woolworths scored similarly on all attributes, while independents and Aldi are perceived to offer the poorest choice, value and quality of fresh vegetables.

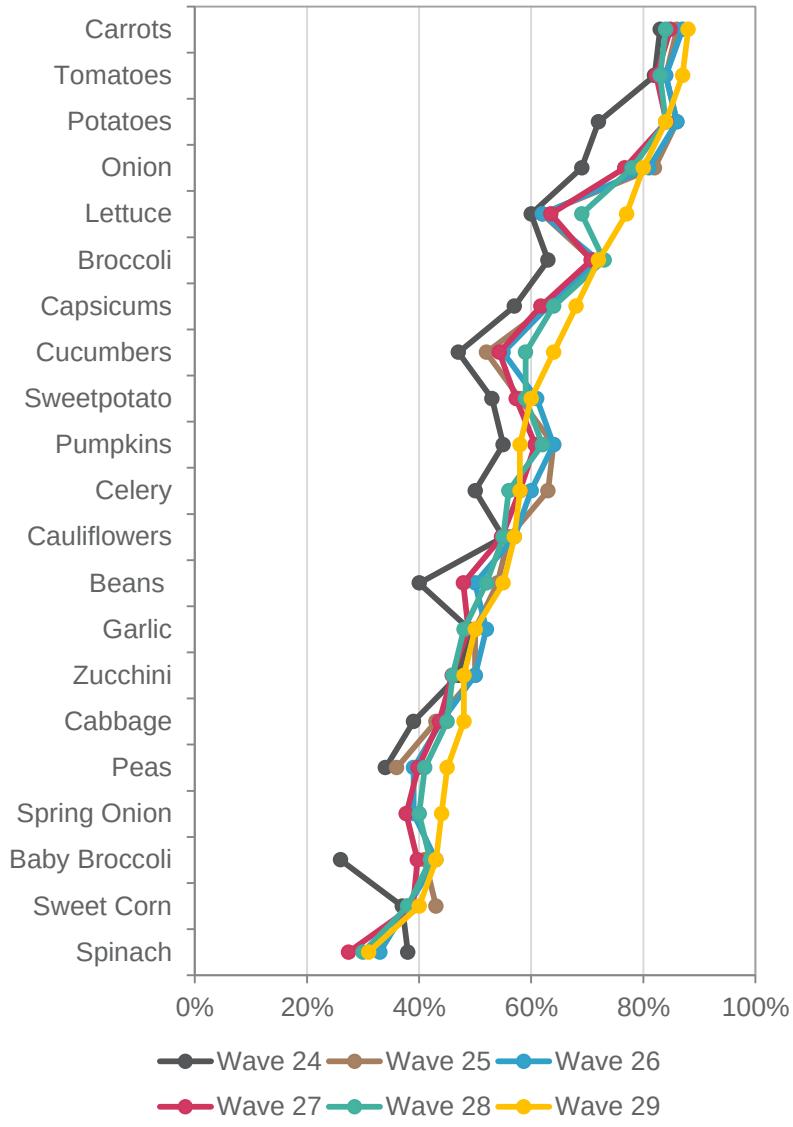
	Speciality Retailer	Woolworths	Coles	Independents	Aldi
Quality	45%	23%	21%	7%	4%
Value	32%	22%	25%	16%	6%
Choice	48%	24%	22%	4%	2%

Q. When thinking about the retailers in Australia, who do you feel provides the best value, quality and choice for fresh vegetables?
N=605

Wave 29: Overall Vegetable Tracking

The top 3 vegetables purchased last month were carrots, tomatoes and potatoes.

This month sees an increase in purchase of lettuce, capsicums and cucumber, likely due to the warmer weather.



Sample Wave 29 N= 885
S8. Which of the following fresh vegetables have you purchased in the last month?

Category Health Explained

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

The Vegetable Average 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**?

Parsley, baby broccoli and pumpkin hold the greatest importance to consumers, whilst they are most satisfied with pumpkin and carrots.

Consumers are most likely to recommend baby broccoli, silverbeet and carrots to their family and friends. In the future, consumers intend to purchase more silverbeet, whilst other vegetable purchase looks to remain stable.

	Beans	Carrots	Cauliflower	Pumpkin	Baby Broccoli	Silverbeet	Parsley	Vegetable Average
Importance	6.5	5.5	5.5	6.6	6.7	6.3	7.1	6.3
Satisfaction	6.4	6.9	6.8	7.3	6.8	6.5	6.8	6.6
Endorsement	6.9	7.3	6.8	7.2	7.3	7.3	7.1	6.9
Interest (New Types)	6.2	5.7	5.7	6.3	6.5	6.5	6.8	6.2
Future Purchase More Same Less	12% 87% 1%	14% 86% 0%	13% 86% 2%	10% 89% 1%	15% 85% 0%	21% 78% 1%	13% 84% 2%	15% 83% 1%

The Vegetable Average is the mean of all commodities from Wave 1, up to and including current wave.

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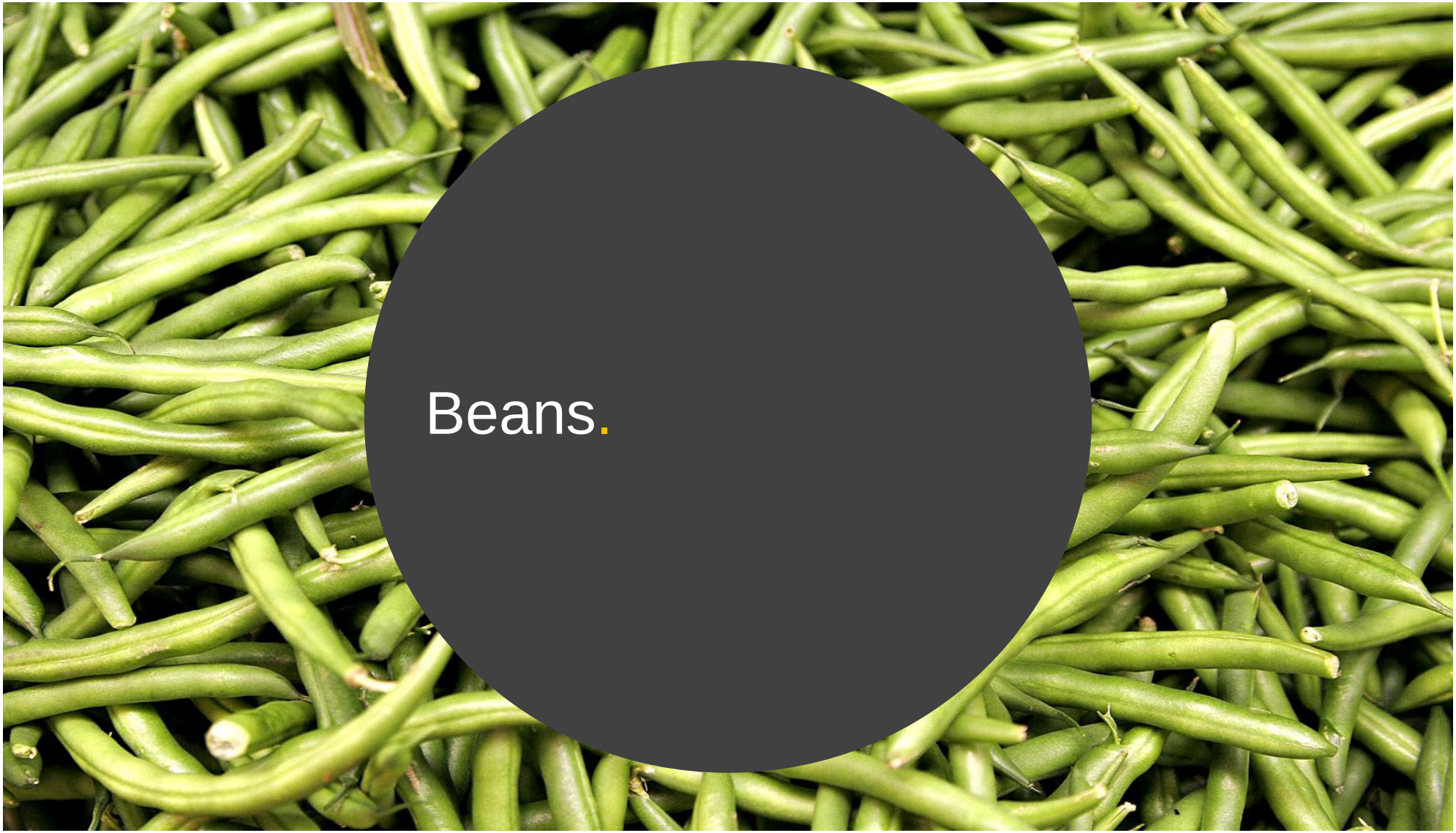


Beans.

Purchase frequency and consumption of beans have remained relatively stable this wave.

Beans are generally bought through mainstream retailers, with an increasing trend in purchase from independent retailers.

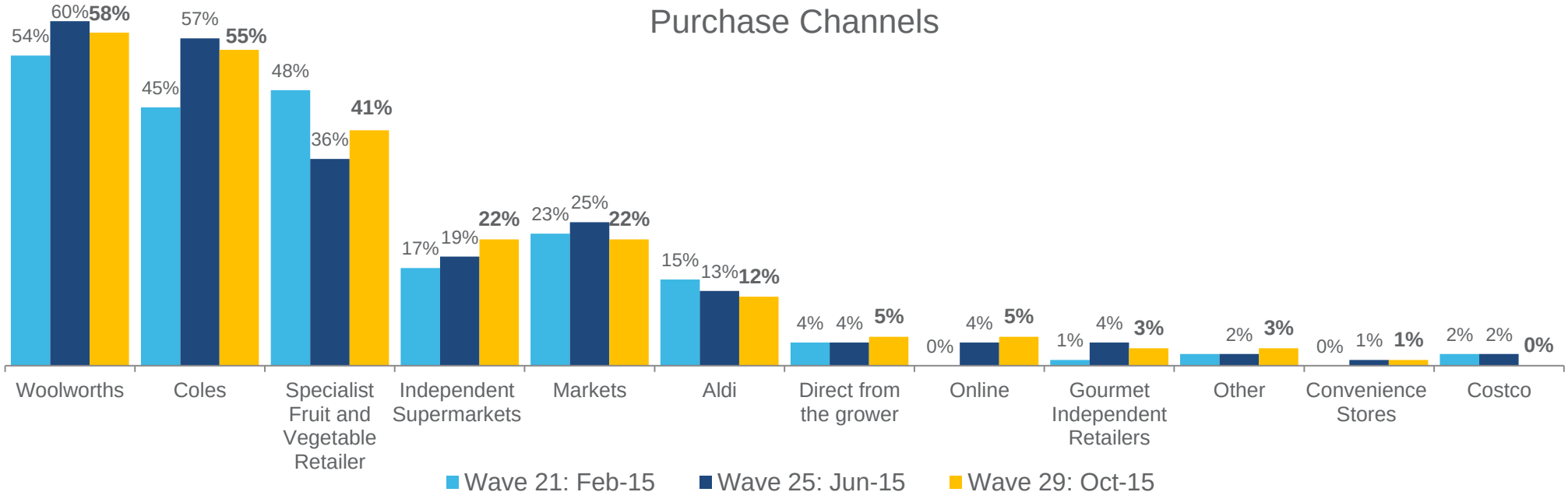
Average Purchase **3.8** times per month

▼ 3.5 times, Wave 21
▲ 3.9 times, Wave 25

Average Consumption **8.8** times per month

▼ 7.0 times, Wave 21
▼ 8.7 times, Wave 25

Purchase Channels



Q1. On average, how often do you purchase French and runner beans?
Q2. On average, how often do you consume French and runner beans?
Q5. From which of the following channels do you typically purchase French and runner beans?
Sample Wave 21 N=309, Wave 25 N=306, Wave 29 N=302

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

Average Spend and Price Sensitivity

Average weight of purchase

The typical consumer purchases **610g** of beans, which has slightly decreased since the past wave.

▼ 600g, Wave 21
▲ 660g, Wave 25

Recalled last spend

Recalled last spend on bean purchase was **$3.40**, which has continued to trend downwards.

▲ $3.70, Wave 21
▲ $3.50, Wave 25

Value for money

Consumers' perceived value for money is good **(6.4/10)**, consistent with the previous wave.

▼ 6.3/10, Wave 21
— 6.4/10, Wave 25

Q3. How much French and runner beans do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is?
Sample Wave 21 N=309, Wave 25 N=306, Wave 29 N=302

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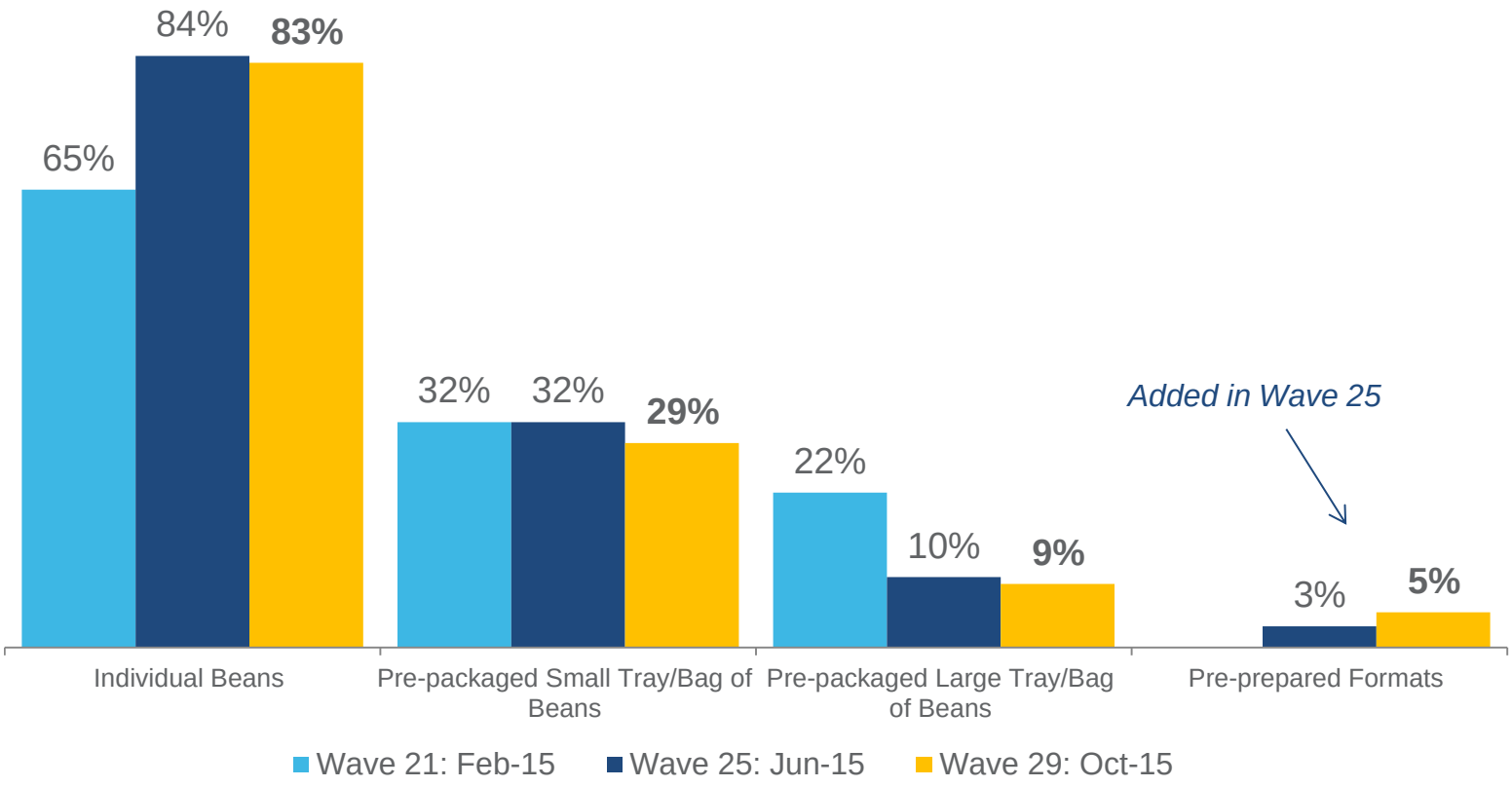
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Loose beans remain the most common format purchased, with all formats consistent with the previous wave, June 2015.



Q4b. In what fresh formats do you typically purchase Beans?
Sample Wave 21 N=309, Wave 25 N=306, Wave 29 N=302

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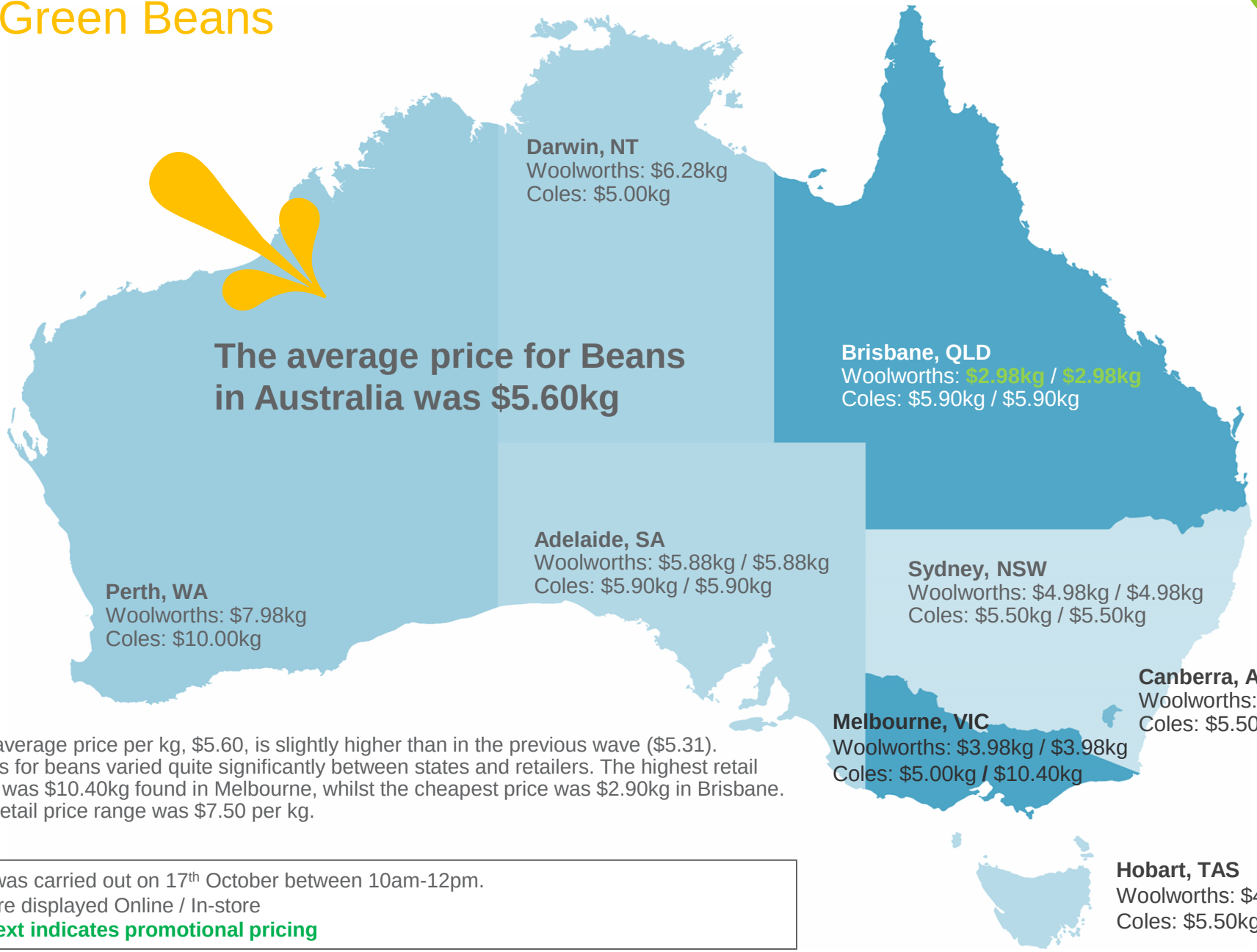
Online and In-store Commodity Prices

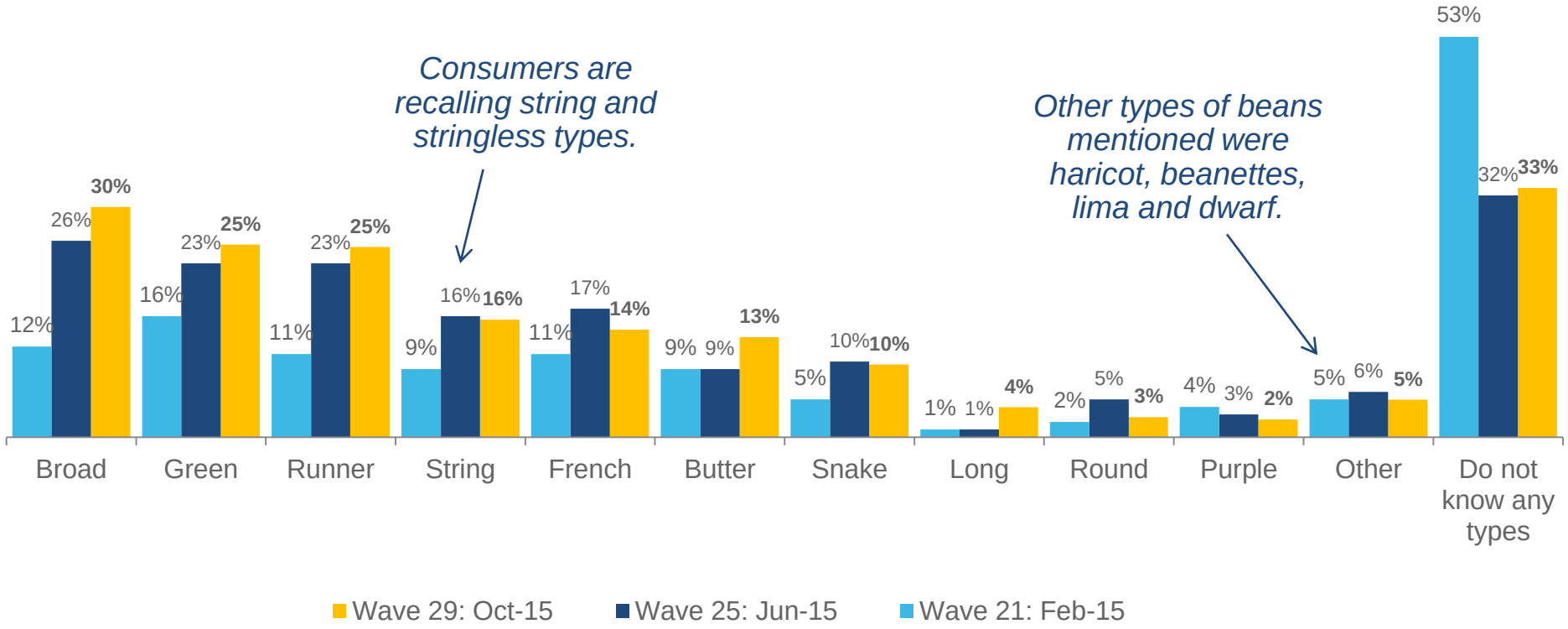
Green Beans



- The average price per kg, $5.60, is slightly higher than in the previous wave ($5.31).
- Prices for beans varied quite significantly between states and retailers. The highest retail price was $10.40kg found in Melbourne, whilst the cheapest price was $2.90kg in Brisbane.
- The retail price range was $7.50 per kg.

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

Broad, runner and green varieties had the greatest level of recall this wave, consistent with previous waves.



Q6a. What varieties/types of French and runner beans are you aware of? (unprompted)
Sample Wave 21 N=309, Wave 25 N=306, Wave 29 N=302

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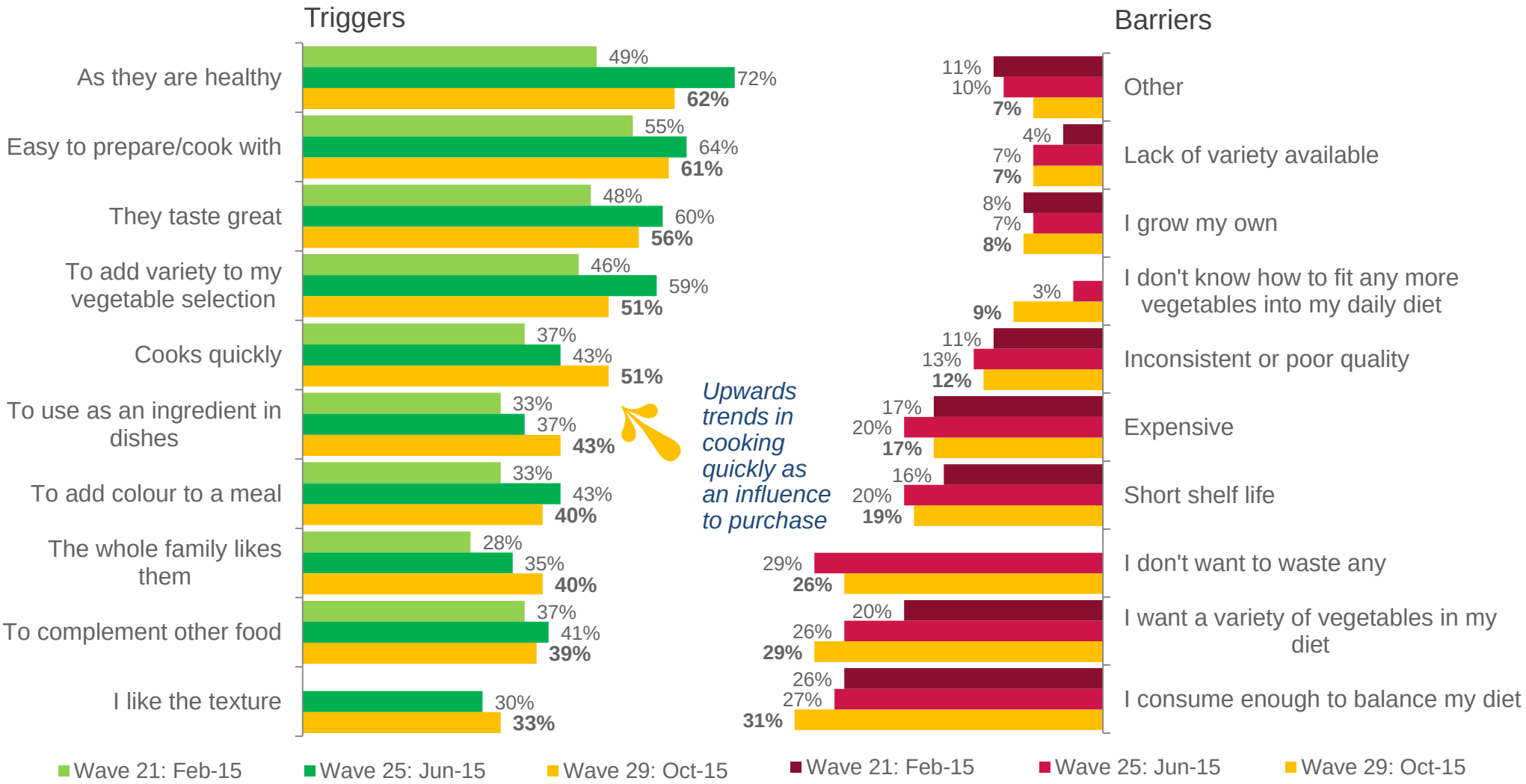
Health and easy to prepare are the primary motivations to purchasing beans. The main barriers to purchase are already consuming enough for their needs and wanting a variety in their diet.



Q7. Which of the following reasons best describes why you purchase French and runner beans?
Q8. Which reason best describes why you don't buy French and runner beans more often?
Sample Wave 21 N=309, Wave 25 N=306, Wave 29 N=302

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Traditional Australian remains the most popular form of cuisine when cooking with beans. This wave sees a noticeable increase in Chinese cuisine.

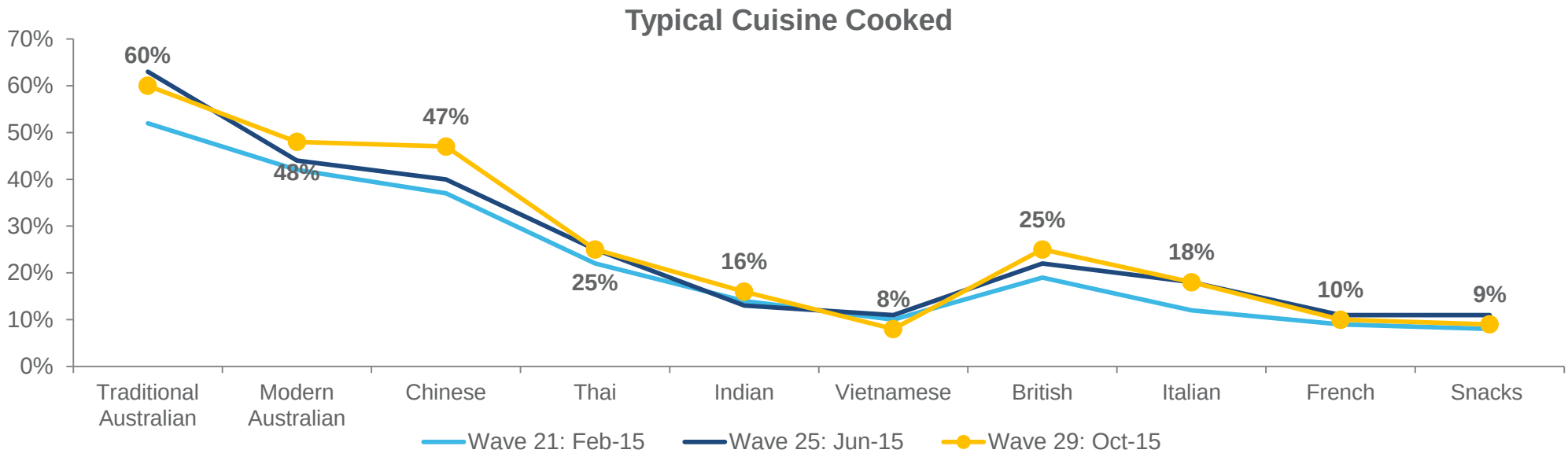
Dinner remains the key meal occasion for beans.

Top 5 Consumption Occasions

	Wave 25	Wave 29
Dinner	73%	**79%**
Family Meals	67%	**69%**
Weekday Meals	52%	**53%**
Weekend Meals	43%	**43%**
Quick Meals	38%	**39%**

18% used green beans when cooking a new recipe

▼ 16%, Wave 21
▼ 15%, Wave 25



← Australian → ← Asian → ← European → Snacks

Q10. What cuisines do you cook/consume that use French and runner beans?
Q11. Which of the following occasions do you typically consume/use French and runner beans?
Sample Wave 21 N=309, Wave 25 N=306, Wave 29 N=302

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

Consumers are more likely to serve beans with carrots and potatoes. Steaming and stir-frying remain the key cooking styles. There has also been a steady increase in sautéing, slow cooking and frying beans across waves.

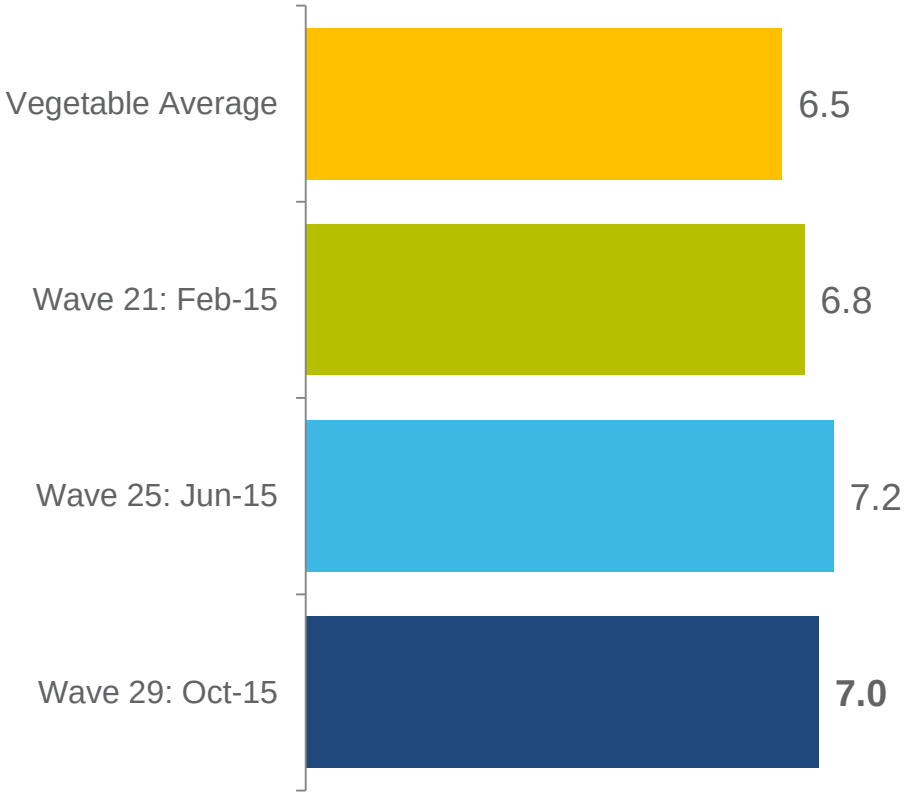
Accompanying Vegetables

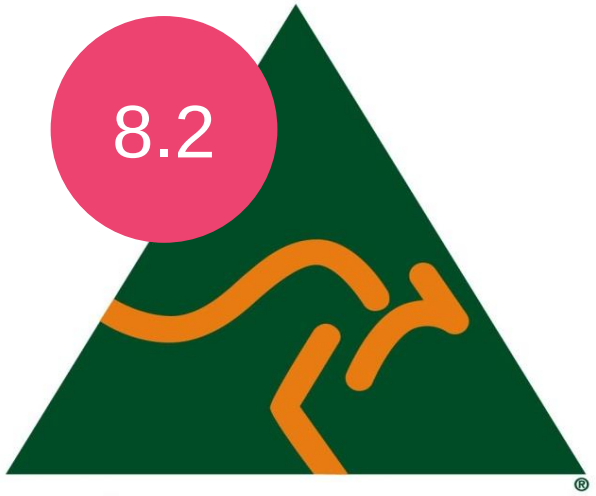
Carrot	65% ▼
Potato	60% ▼
Broccoli	38% ▼
Onion	35% ▲
Sweet Potato	27% ▼

Top 10 Cooking Styles			
	Wave 21	Wave 25	Wave 29
Steaming	52%	64%	**58%**
Stir frying	48%	50%	**55%**
Boiling	40%	46%	**50%**
Raw	13%	19%	**22%**
Microwave	22%	18%	**22%**
Soup	11%	20%	**19%**
Sautéing	10%	16%	**19%**
Slow Cooking	10%	14%	**17%**
Frying	1%	8%	**14%**
Roasting	3%	3%	**8%**

Q9. How do you typically cook French and runner beans?
Q10a. And when are you serving French and runner beans which of the following do you also serve together with this?
Sample Wave 21 N=309, Wave 25 N=306, Wave 29 N=302

This wave sees a slight decline in the importance of provenance for beans. However, knowing that beans are grown in Australia remains even more important to consumers.





Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 21 N=309, Wave 25 N=306, Wave 29 N=302

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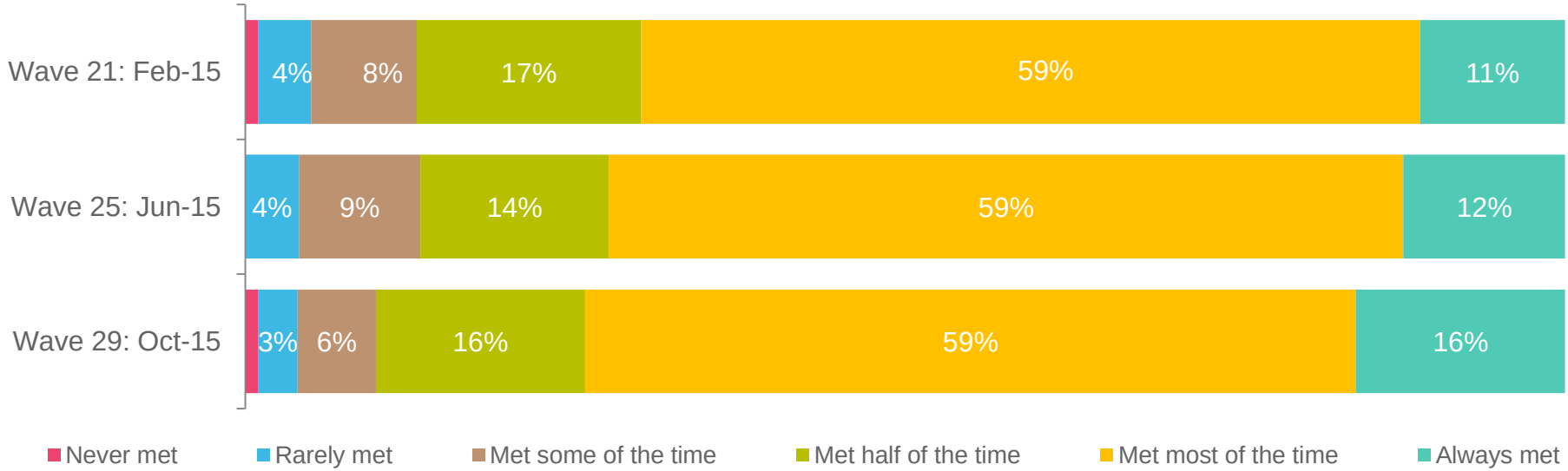
Beans are expected to stay fresh for one week once purchased, which is consistent with the previous wave.

Expectations of freshness have increased over the past months, and are generally being met.

Expected To stay fresh for **7.5** days

▼ 7.1 days, Wave 21
▲ 7.6 days, Wave 25

Expectations Met



Q12. How long do you expect French and runner beans to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy French and runner beans?
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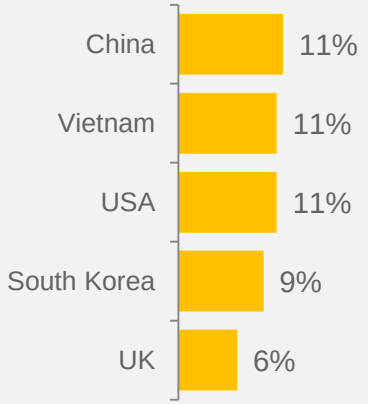
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Bean Product Launch Trends.

Bean Global NPDs
August – October 2015

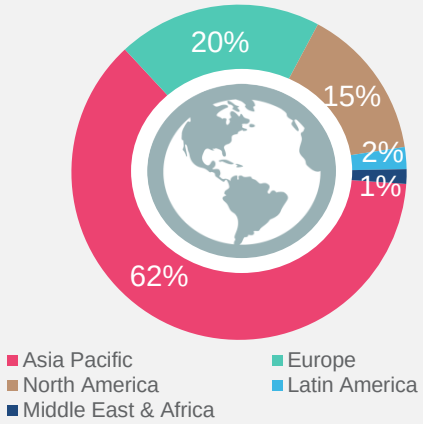
142 products containing green beans were launched globally in the last three months. Asia Pacific was the key region for launches. Meals and baked goods were top categories with preservative free and vegetarian claims most commonly used.

Country

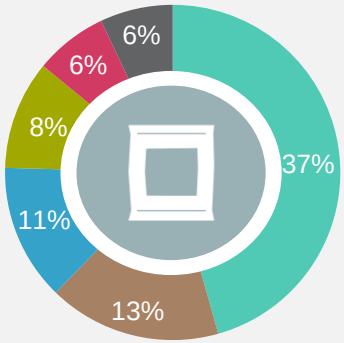


142 Global NPDs

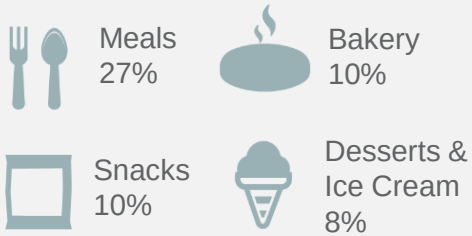
Region



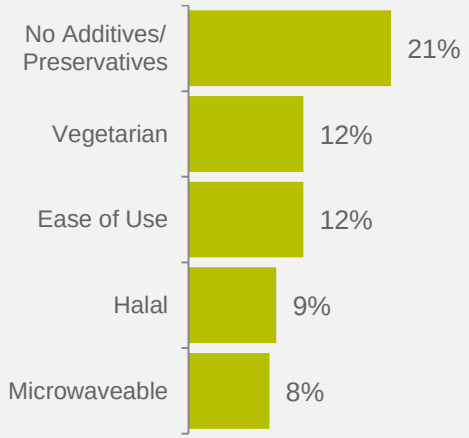
Top Pack Formats



Categories



Top Claims



Bean Product Launches:
Last 3 Months (August – October 2015)
Summary

- A total of 142 products containing French and Runner beans as an ingredient were launched globally in the last 3 months, which is consistent with previous trends.
- There were seven products launched in Australia in the past three months.
- Asia Pacific (62%) continued to be the top region for product launches.
- Flexible (37%) and tub (13%) packaging formats are consistently used for bean products launched.
- The top categories for product launches were meals (27%), baked goods (10%) and snacks (10%).
- The core claims used for these launches globally were no additives/preservatives (21%), vegetarian (12%), and ease of use (12%).
- The most innovative launch was the green bean ice cream from Vietnam. Examples of innovative green bean products can be found on the following slides.

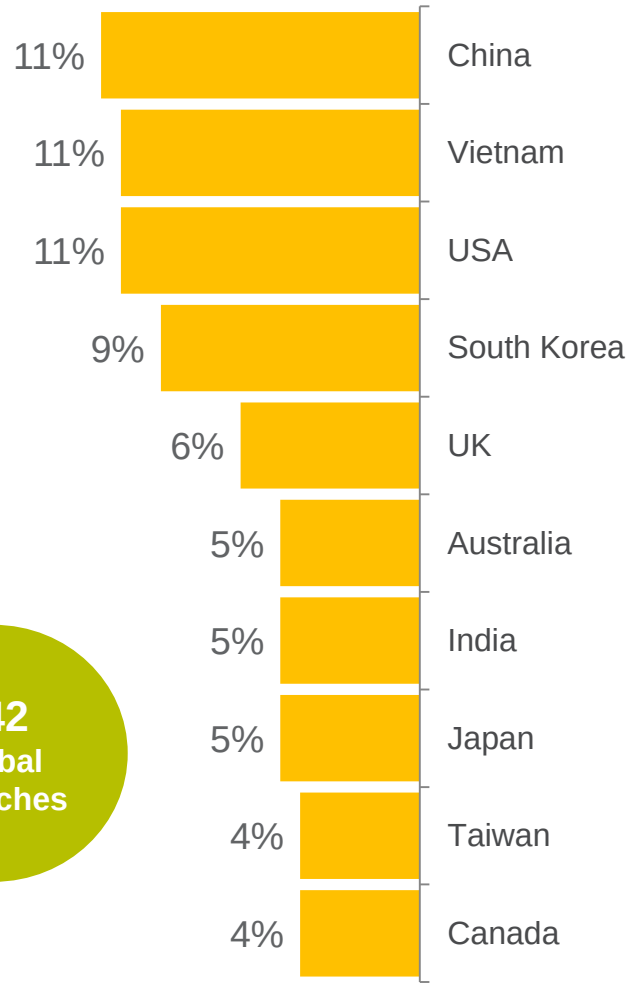
.

Source: Mintel (2015)

Bean Launches
Country & Categories

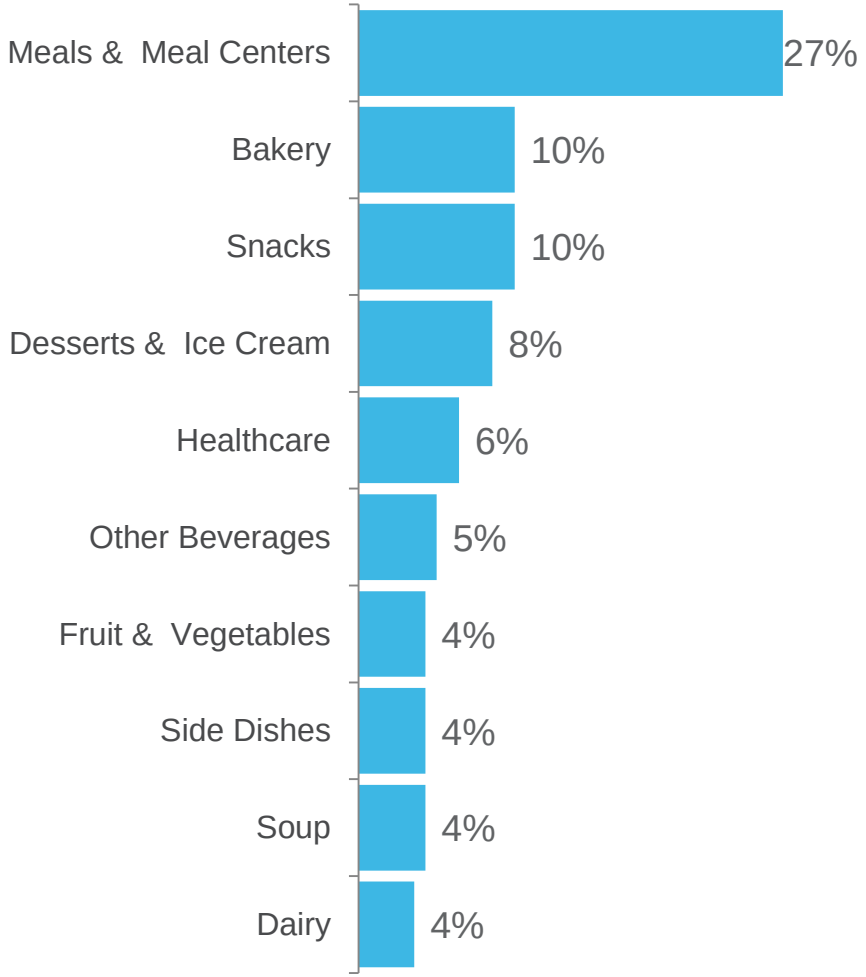
- China was the key country for green bean product launches, followed by Vietnam and USA.
- Meals, bakery and snack products were the top categories for launches, consistent with previous trends.

Top Launch Countries



142
Global Launches

Top Launch Categories



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Number of Global Beans NPDs for the L3M N=142

Bean Launches

Top Claims & Pack Formats Used

- No Additives/Preservatives was the most prominent claim in Wave 29. Vegetarian and ease of use were also common claims used.
- Globally the top pack formats used for product launches were flexible packaging and tubs.

Pack Formats Used

Global	Flexible	37%
	Tub	13%
	Tray	11%
Asia Pacific	Flexible	44%
	Flexible Sachet	14%
	Tub	9%

Top Claims Used

Global	No Additives/Preservatives	21%
	Vegetarian	12%
	Ease of Use	12%
Asia Pacific	No Additives/Preservatives	24%
	Ease of Use	19%
	Vegetarian	15%

Number of Global NPDs for the L3M N=142
Only regions with n >30 are displayed

Innovative Bean Launches:
L3M (August – October 2015)

Sanwa Premium Mung Bean Thread (Philippines)

Sanwa Premium Mung Bean Thread is made from 100% green beans and processed with modern technology that is fully automated to produce with the highest standard of quality and hygiene. Each bean thread size is made to minimize preparation time. The product is described to be delicious and nutritious, and retails in a 1000g pack featuring a recipe idea.

Claims:
Premium, Time/Speed

Acecook Phu Huong Pork Rib Flavoured Vermicelli (Vietnam)

Acecook Phu Huong Mien Vi Suon Heo (Pork Rib Flavoured Vermicelli) has been relaunched and was previously under the Vina Acecook Phu Huong brand name. The instant vermicelli is made from green beans and now retails in a newly designed 58g pack.

Claims:
Time/Speed

Begro Extra Fine Whole Green Beans (Hong Kong)

Begro Extra Fine Whole Green Beans are now available. The product retails in 1000g recyclable pack.

Claims:
Ethical - Environmentally Friendly Package

Vietngucoc Milk & Green Bean Powder (Vietnam)

Vietngucoc Sua va Dau Xanh (Milk & Green Bean Powder) is now available. The product is said to help support the vision, detoxify the body and to be good for the digestive system. It is high in fiber, contains 13,5% of protein and no preservatives, artificial sweetener or colours. It can be served hot or can be added with ice cubes for a cold drink, and retails in a 375g pack containing 15 x 25g packets plus a free glass.

Claims:
Beauty Benefits, No Additives/Preservatives, Immune System (Functional), High/Added Fiber, Other (Functional), Slimming, Antioxidant, Cardiovascular (Functional), Digestive (Functional)

Source: Mintel (2015)

Innovative Bean Launches:
L3M (August – October 2015)

Vinica Wok Wellness Mix (Slovakia)

Vinica Wok Wellness (Wok Wellness Mix) is now available. This vegetable mix has been flash frozen via modern liquid technology that maintains the consistency, colour, flavour, nutrients and vitamins of fresh vegetables. The product is especially suitable for preparation of oriental dishes in a wok, and retails in a 350g pack featuring the IQF Quality logo.

Claims:
N/A

Cola Cao Chocolate Flavoured Grain Chocolate Bars (China)

Cola Cao Qiao Ke Li Kou Wei Gu Wu Qiao Ke Li Bang (Chocolate Flavoured Grain Chocolate Bars) have been relaunched and are now richer and crispier. This product is blended with five types of grains and retails in a newly designed 220g pack containing 10 units.

Claims:
N/A

Merino X Cereal and Green Bean Ice Cream (Vietnam)

Merino X Kem Dau Xanh Yen Mach (Cereal and Green Bean Ice Cream) has been repackaged in a newly designed 60g pack. This pack features opportunities to win valuable prizes from Minions movie character to celebrate the summer 2015.

Claims:
Seasonal, Event Merchandising, Children (5-12)

Xin Te Ruan / Soft Stuffing Original Flavoured Green Bean Cake (China)

Xin Te Ruan / Soft Stuffing Yuan Wei Lv Dou Gao (Original Flavoured Green Bean Cake) has been repackaged. This halal certified product now retails in a newly designed 50g pack.

Claims:
Halal

Source: Mintel (2015)

Innovative Bean Launches:
L3M (August – October 2015)

Tokiwa Yakuhin Noevir Group Soymilk Smoothie (Japan)

Tokiwa Yakuhin Noevir Group Soymilk Smoothie can be prepared with just water. It is claimed to be high in protein, and contains over 100 types of vegetable and fruit fermented extracts, dietary fibre equivalent to 1.8 of a lettuce and a sterile botanical lactic acid. It is claimed to smoothly melt into water. This diet product retails in a 204g pack that provides 12 to 24 servings. Launched on April 1, 2015 with an RRP of 2,700 yen. Also available in 4 x 8.5g pack for 648 yen.

Claims:
High Protein, Slimming

Gia Bao Green Bean Cake (Vietnam)

Gia Bao Banh Dau Xanh (Green Bean Cake) has been repackaged in a newly designed 440g pack. It is made using traditional method in combination with modern processing chain to maintain the delicious taste of the cake. This ready-to-eat product is the specialty of Hai Duong area.

Claims:
Ease of Use

John Masters Organics Geranium & Grapefruit Body Wash (UK)

The John Masters Organics Geranium & Grapefruit line includes Body Wash, now available in a new 60ml travel-size pack. The product is said to lather into a rich, creamy foam to gently wash away dirt and oil without drying or over stripping skin for a silky and soft result.

Claims:
No Additives/Preservatives, Sulphate/Sulfate Free, Aromatherapy, Paraben Free, Anti-Bacterial, Botanical/Herbal, Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Ethical - Animal, On-the-Go, Gluten-Free, Organic, Moisturising / Hydrating, Toning*, GMO-Free

AH Slaatje Beef Salad (Netherlands)

AH Slaatje Rundvlees Slaatje (Beef Salad) has been repackaged in a newly designed 150 pack. The milk free salad is firmly packed with tender chunks of beef.

Claims:
N/A

Source: Mintel (2015)

Top Australian Bean Launches:
L3M (August – October 2015)

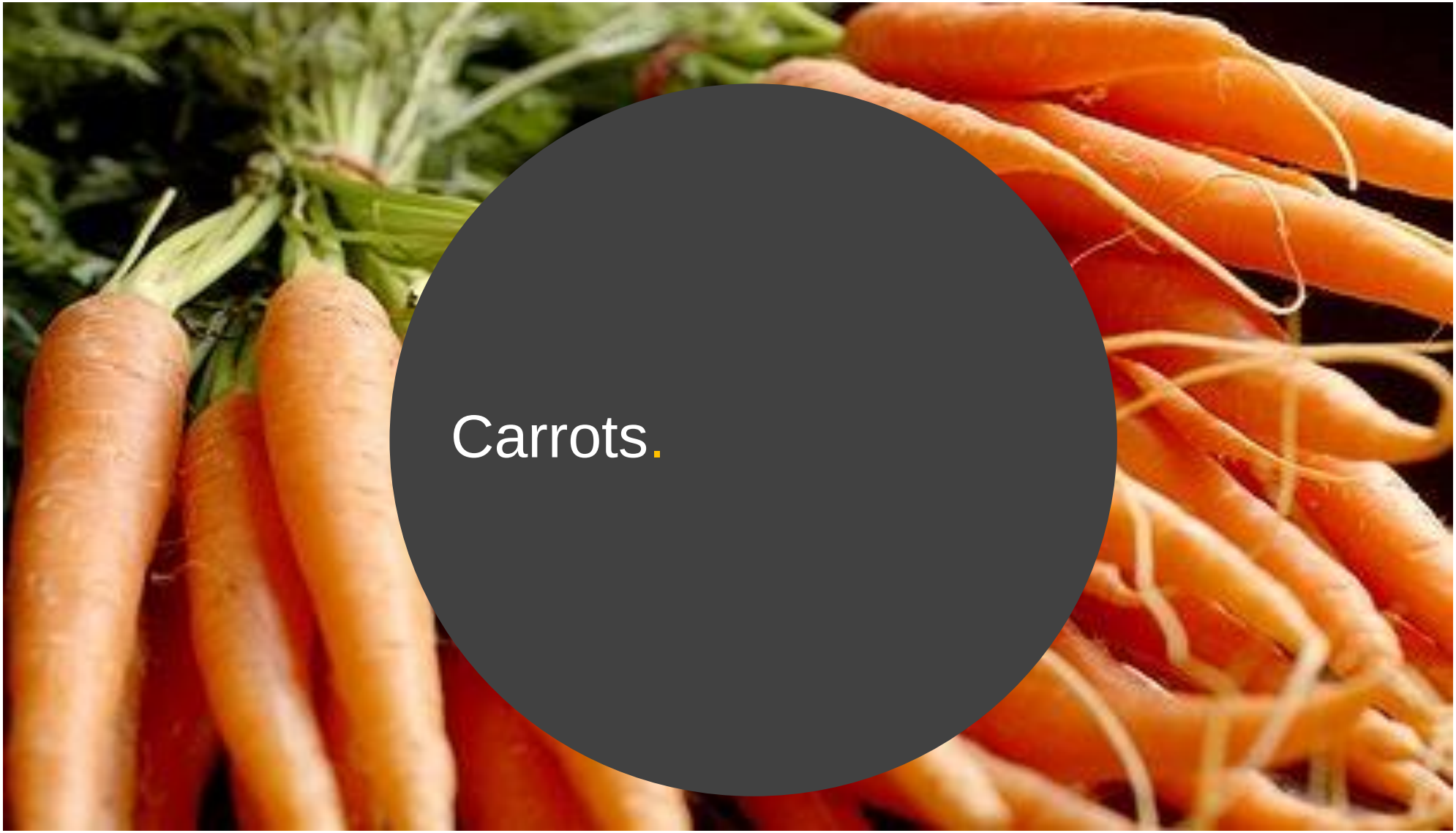
INC. Diet Whey Formulated Supplementary Sports Food with Chocolate Flavour

Woolworths Select Chicken Satay Meal for One

Colonial Farm Asian Party Pack

Mission Burrito Kit

Source: Mintel (2015)



Carrots.

Whilst average purchase has remained stable, consumption of carrots has increased this wave. Carrots are consumed very frequently, around once every second day.

Mainstream retailers remain the key purchase channel, but specialist retailers, independent supermarkets and online channels have seen an increase this wave.

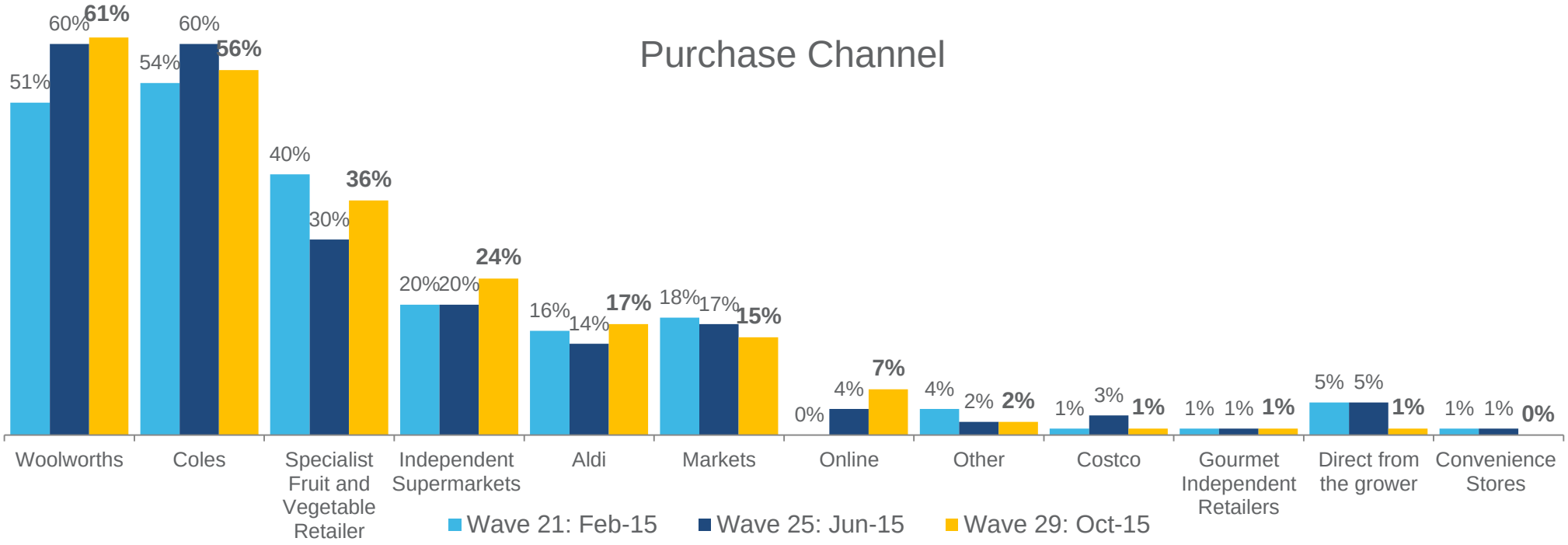
Average Purchase **3.9** times per month

▼ 3.7 times, Wave 21
▲ 3.9 times, Wave 25

Average Consumption **15.2** times per month

▼ 14.4 times, Wave 21
▼ 14.0 times, Wave 25

Purchase Channel



Q1. On average, how often do you purchase carrot?
Q2. On average, how often do you consume carrot?
Q5. From which of the following channels do you typically purchase carrot?
Sample Wave 21 N=312, Wave 25 N=305, Wave 29 N=302

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

Average Spend and Price Sensitivity

Average weight of purchase

The typical consumer purchases **1.2kg** of carrots, which is consistent with the previous wave.

▼ 1.1kg, Wave 21
— 1.2kg, Wave 25

Recalled last spend

Recalled last spend on carrots was **$2.30**, remaining relatively consistent across past waves.

▲ $2.40, Wave 21
— $2.30, Wave 25

Value for money

Consumers' perceived value for money is very good **(7.6/10),** slightly higher than past months.

▼ 7.5/10, Wave 21
▼ 7.4/10, Wave 25

Q3. How much carrot do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? 0-10 scale
Sample Wave 21 N=312, Wave 25 N=305, Wave 29 N=302

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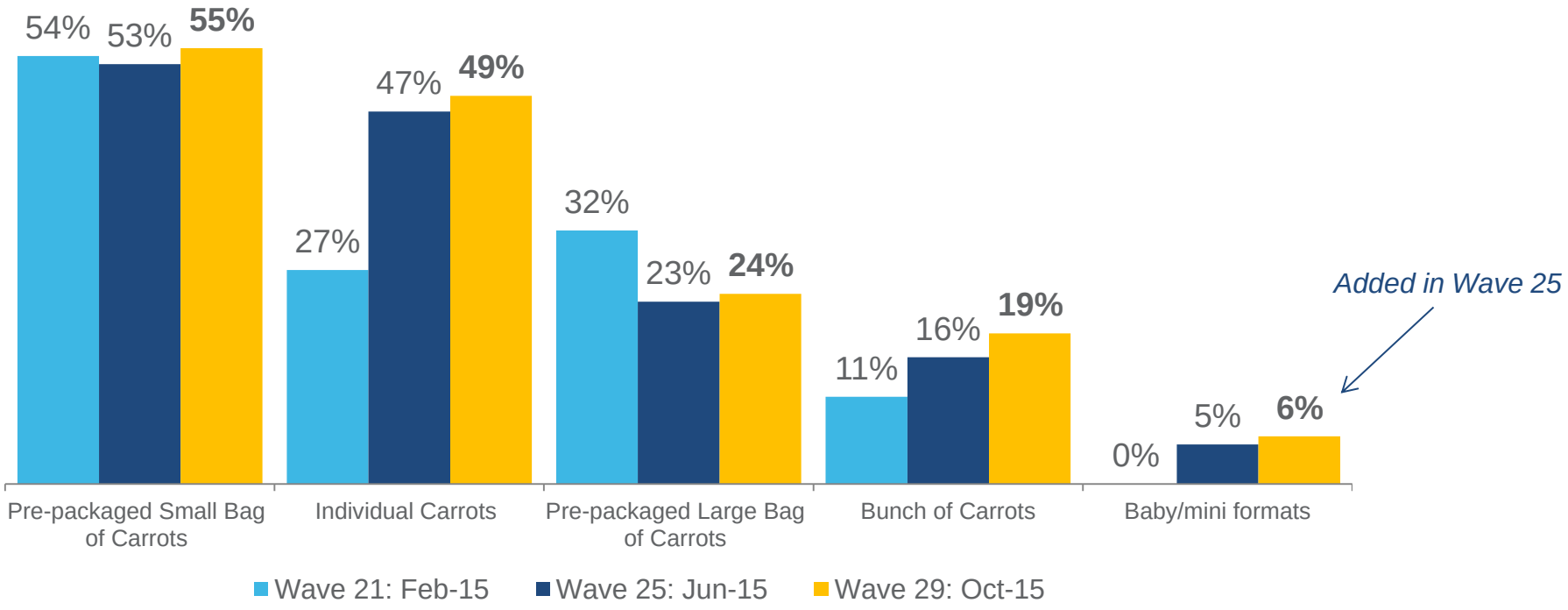
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Small bags of carrots remain the primary format purchased, whilst the purchase of individual and bunched carrots is increasing upon past waves.



Q4b. In what fresh formats do you typically purchase Carrots?
Sample Wave 21 N=312, Wave 25 N=305, Wave 29 N=302

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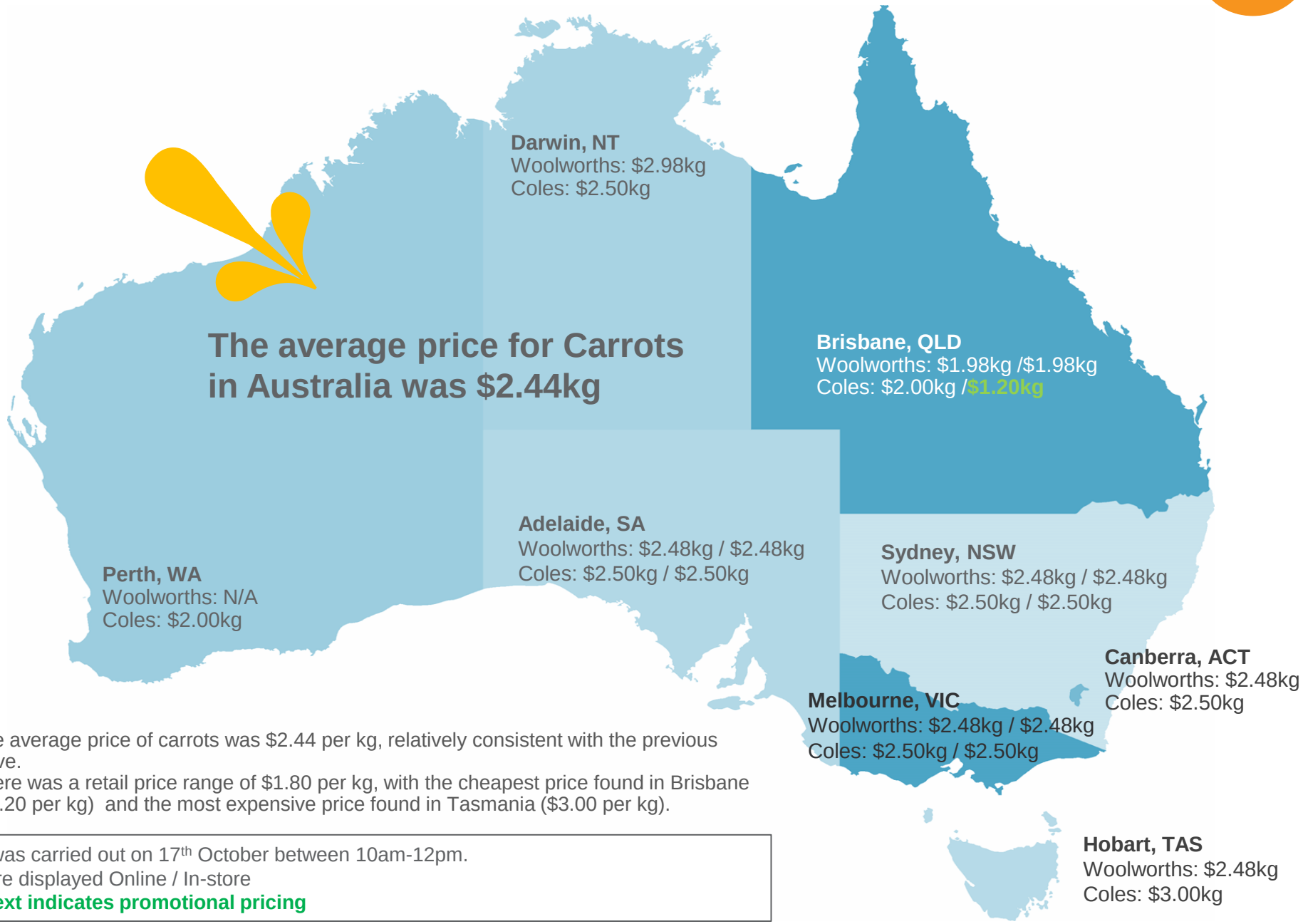
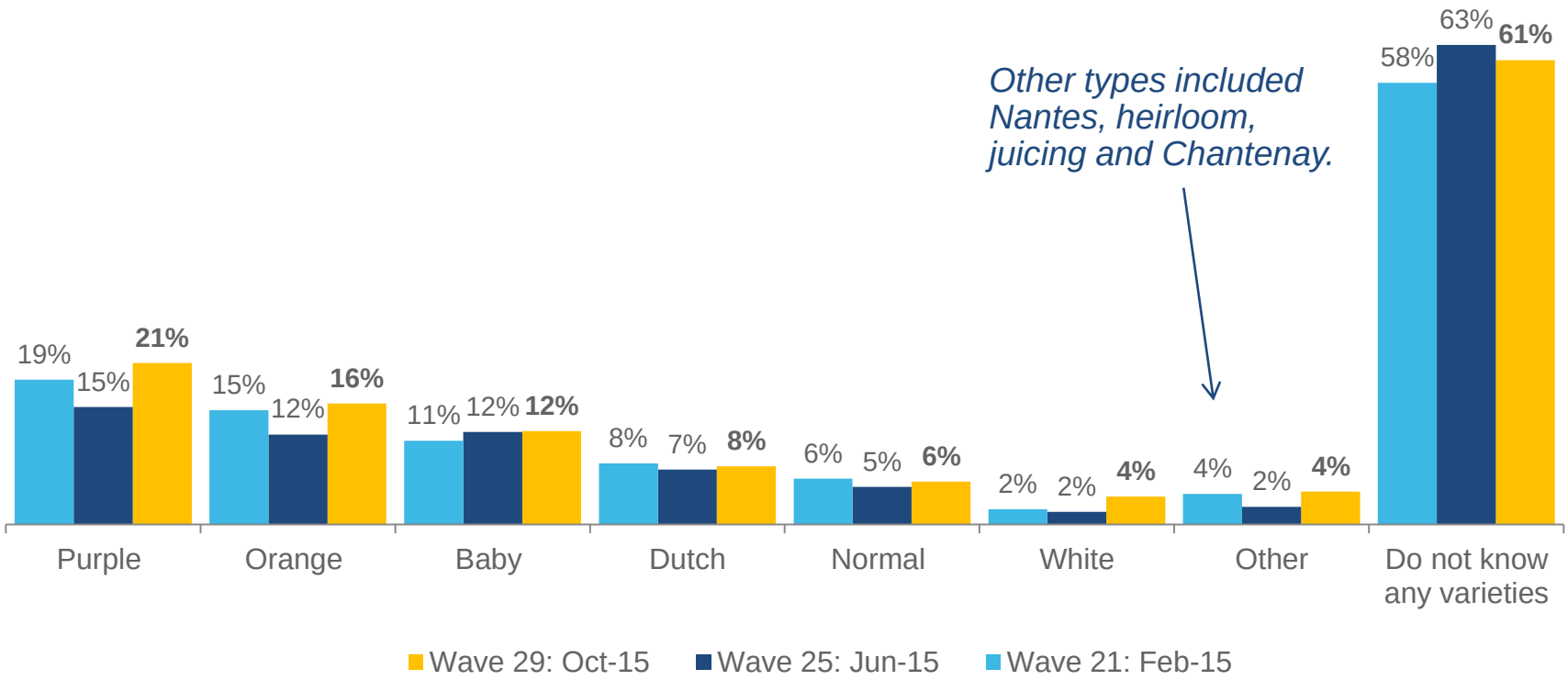
Online and In-store Commodity Prices



- The average price of carrots was $2.44 per kg, relatively consistent with the previous wave.
- There was a retail price range of $1.80 per kg, with the cheapest price found in Brisbane ($1.20 per kg) and the most expensive price found in Tasmania ($3.00 per kg).

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

Over one half of consumers are unable to recall a type of carrot. Colour is the main trigger for unprompted carrot variety awareness with purple and orange having the highest recall.



Q6a. What varieties/types of carrot are you aware of? (unprompted)
Sample Wave 21 N=312, Wave 25 N=305, Wave 29 N=302

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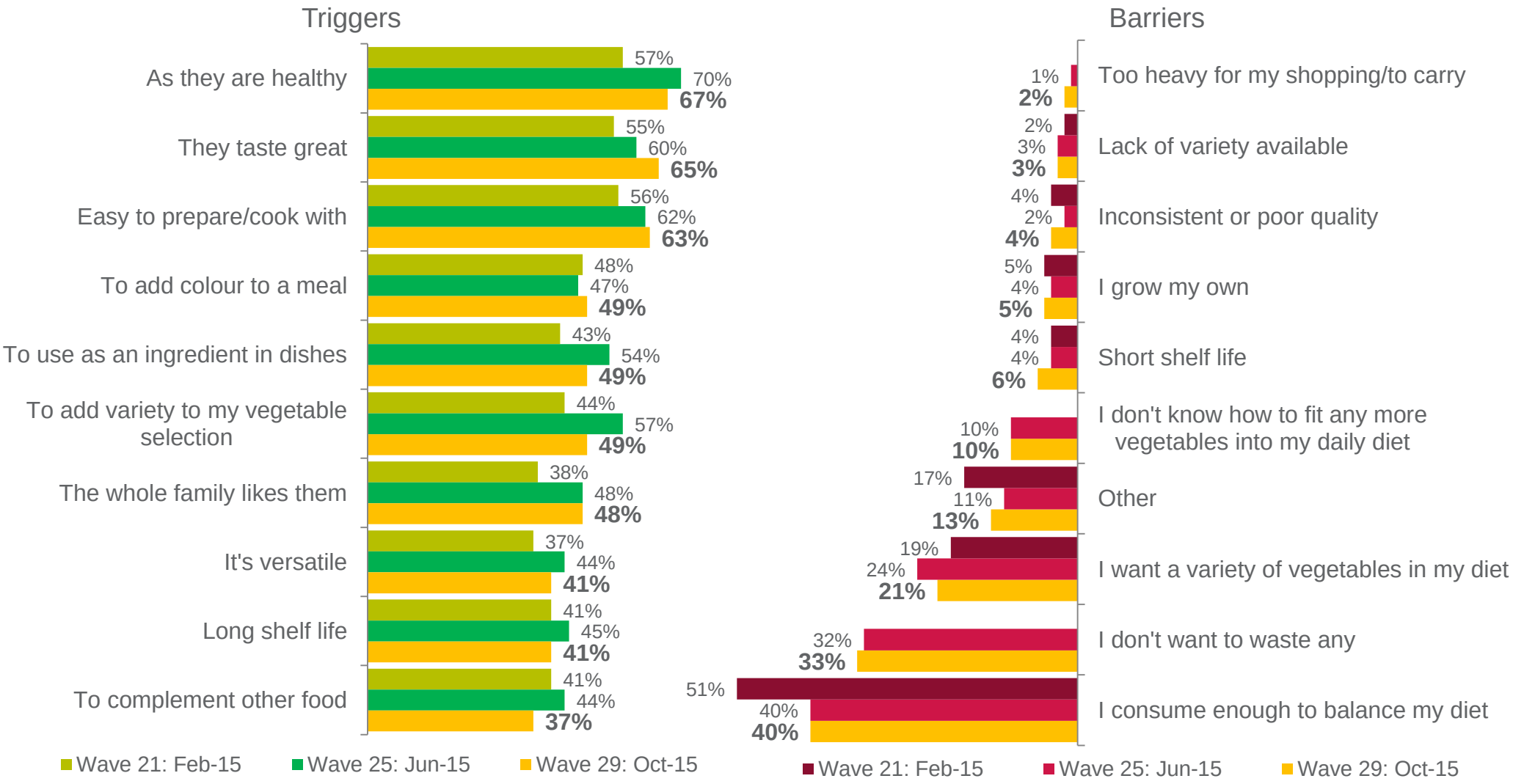
Health, taste and ease of preparation are the main drivers of carrot purchase. Already consuming enough and not wanting to waste any are the main barriers for future purchase.



Q7. Which of the following reasons best describes why you purchase carrot?
Q8. Which reason best describes why you don't buy carrot more often?
Sample Wave 17 N=304, Wave 21 N=312, Wave 25 N=305

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There has been no significant movement in cuisines over the previous three waves, indicating consumers may lack interest and inspiration for alternative cuisines.

Dinner remains the dominant meal occasion. This is a large increase in quick meals this wave.

Top 5 Consumption Occasions

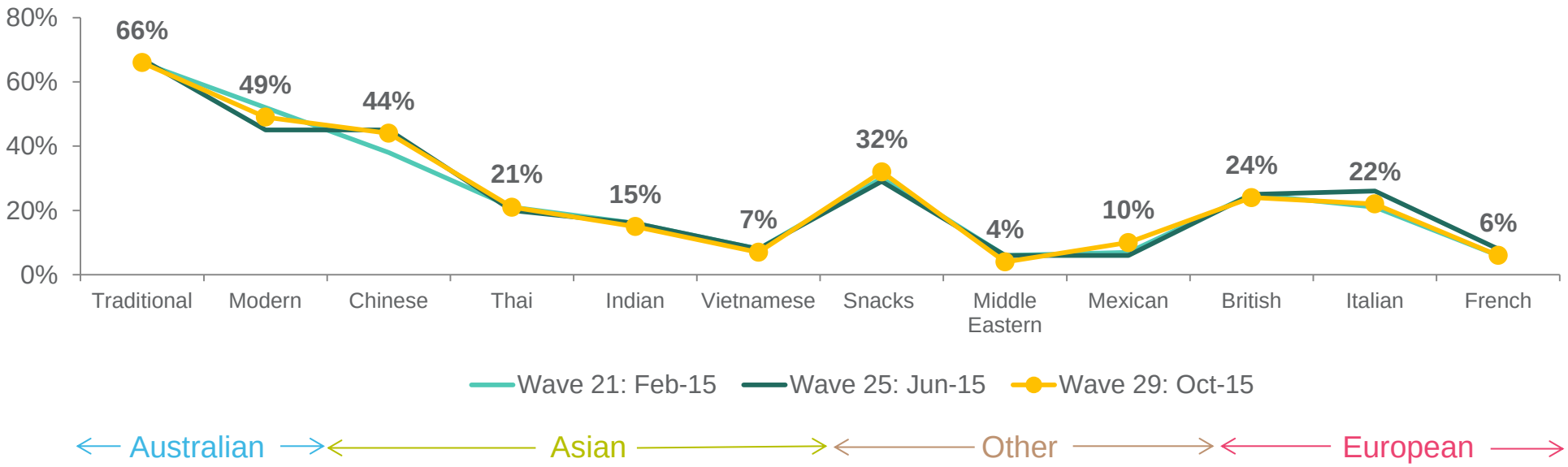
	Wave 25	Wave 29
Dinner	77%	**78%**
Family Meals	69%	**70%**
Weekday Meals	54%	**63%**
Weekend Meals	49%	**53%**
Quick Meals	39%	**50%**

23% used carrot when cooking a new recipe

▼ 13%, Wave 21

▼ 20%, Wave 25

Typical Cuisine Cooked



Q10. What cuisines do you cook/consume that use carrot?
Q11. Which of the following occasions do you typically consume/use carrot?
Sample Wave 21 N=312, Wave 25 N=305, Wave 29 N=302

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

Carrots are typically served with potatoes, broccoli and onion.

Consumers cook carrots in a variety of ways. This wave sees a large increase in consuming carrots raw, whilst baking has continued to decline over the last three waves.

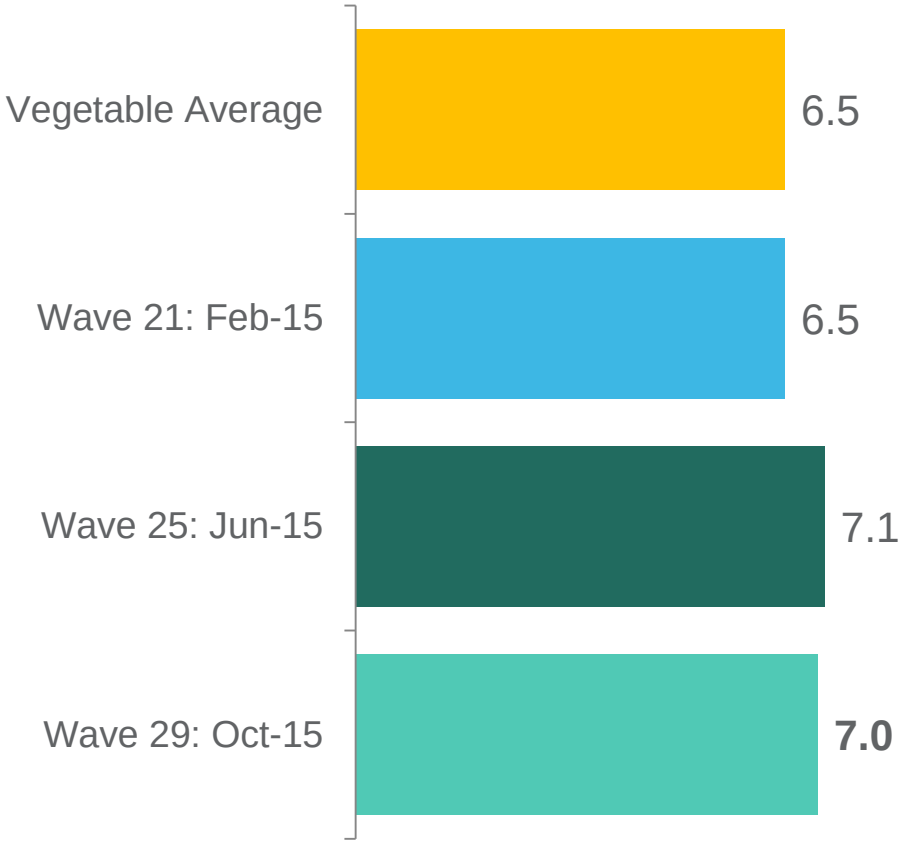
Accompanying Vegetables

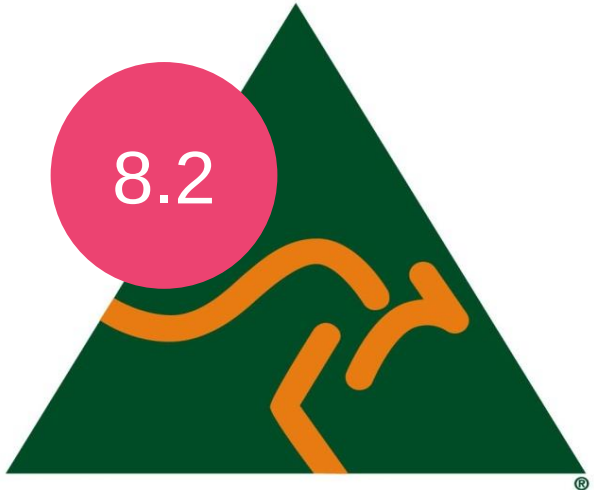
Potato	75%
Broccoli	54%
Onion	42%
Beans	38%
Cauliflower	36%

Top 10 Cooking Styles			
	Wave 21	Wave 25	Wave 29
Raw	46%	47%	**57%**
Stir frying	48%	50%	**55%**
Steaming	46%	47%	**53%**
Roasting	48%	53%	**52%**
Boiling	46%	49%	**43%**
Soup	34%	41%	**36%**
Slow Cooking	27%	29%	**24%**
Microwave	25%	25%	**21%**
Baking	30%	28%	**21%**
Sautéing	9%	12%	**16%**

Q9. How do you typically cook carrot?
Q10a. And when are you serving carrot which of the following do you also serve together with this?
Sample Wave 21 N=312, Wave 25 N=305, Wave 29 N=302

Carrot provenance has slightly declined, but is still important to consumers. Knowing their carrots are Australian grown is the most important provenance information to consumers.





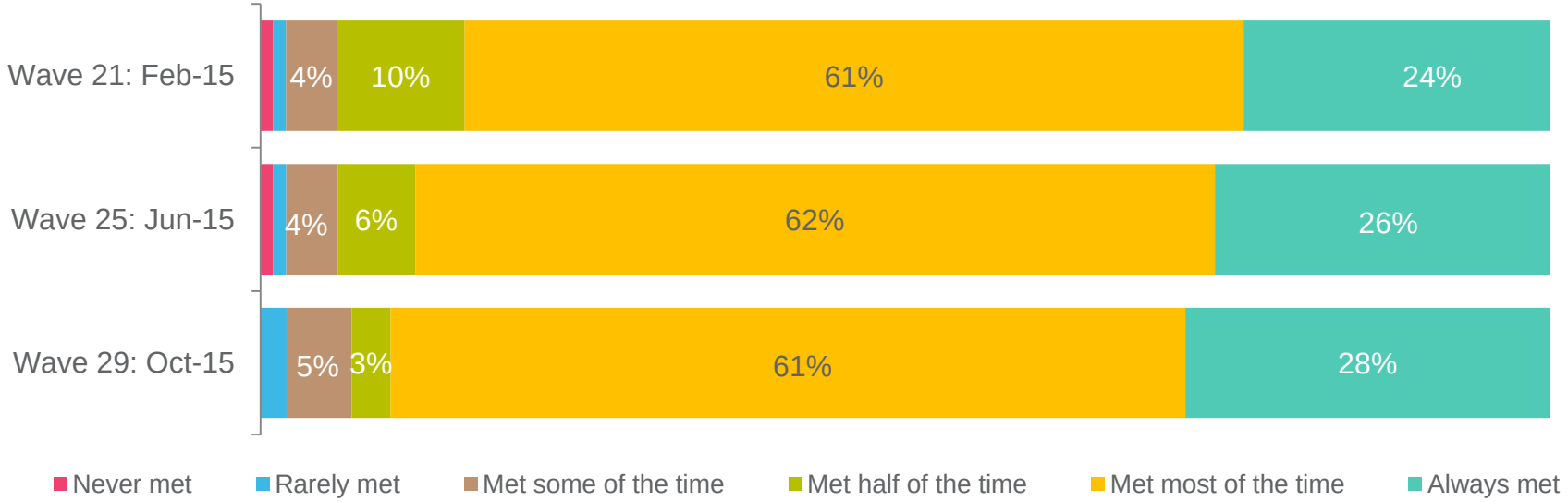
Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 21 N=312, Wave 25 N=305, Wave 29 N=302

Carrots are expected to stay fresh for around 12 days, with satisfaction of freshness continuing to increase upon previous waves.

Expected to stay fresh for **12.3** days

▲ 12.4 days, Wave 21
▲ 12.6 days, Wave 25

Expectations Met



Q12. How long do you expect carrots to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy carrots?
Sample Wave 21 N=312, Wave 25 N=305, Wave 29 N=302

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

Carrot Product Launch Trends.

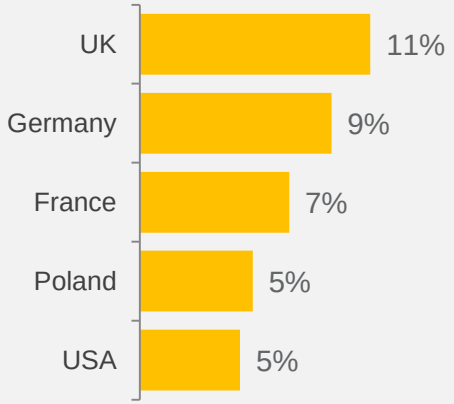
Carrot Global NPDs

August – October 2015

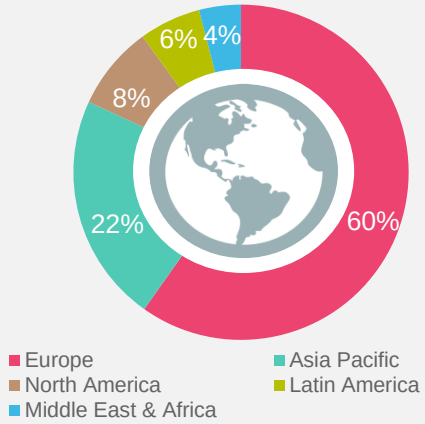
There were 1833 global new products launched over the last 3 months that contained carrot as an ingredient, a decline from the previous wave (2085). The majority of these launches occurred in Europe. Flexible packaging was most common and the key launch category was meals.

1833 Global NPDs

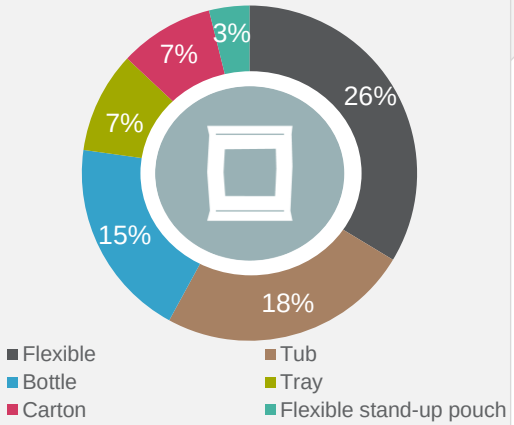
Country



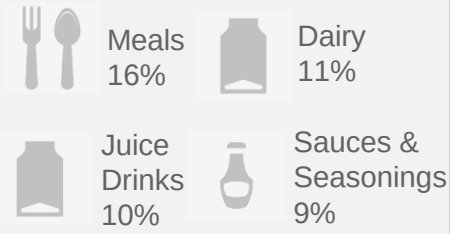
Region



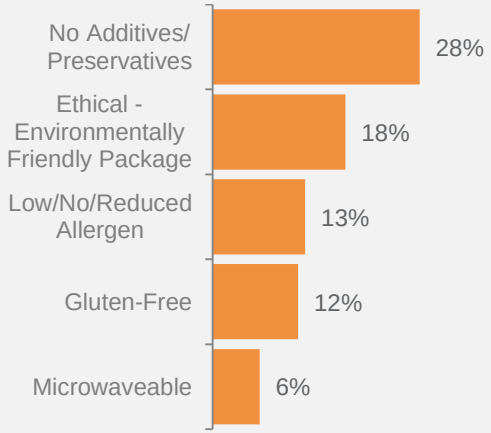
Top Pack Formats



Categories



Top Claims



Carrot Product Launches:
Last 3 Months (August – October 2015)
Summary

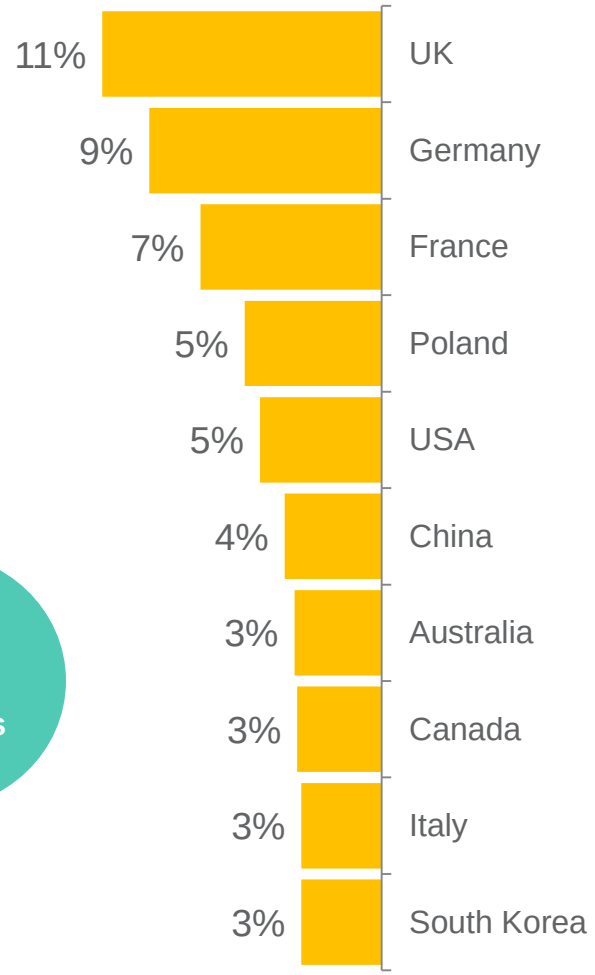
- A total of 1833 products were launched globally in the last 3 months containing carrot as an ingredient, which has declined since the previous wave (2085 launches).
- There were 63 carrot-containing products launched in Australia in the last quarter. See upcoming pages for examples of Australian launches.
- Europe and the Asia Pacific were the 2 top regions for these product launches (60% and 22% respectively).
- The top pack formats used were flexible formats (26%) and tubs (18%).
- The top categories for product launches were meals (16%), dairy (11%) and juice drinks (10%).
- The top claims used for launches globally were no additives/preservatives (28%), ethical - environmentally friendly (18%), and low/no/reduced allergen (13%).
- The most innovative launch found was a frozen smoothie from Norway. Examples of these products can be found at the end of the carrot trend report.

Source: Mintel (2015)

Carrot Launches
Country & Categories

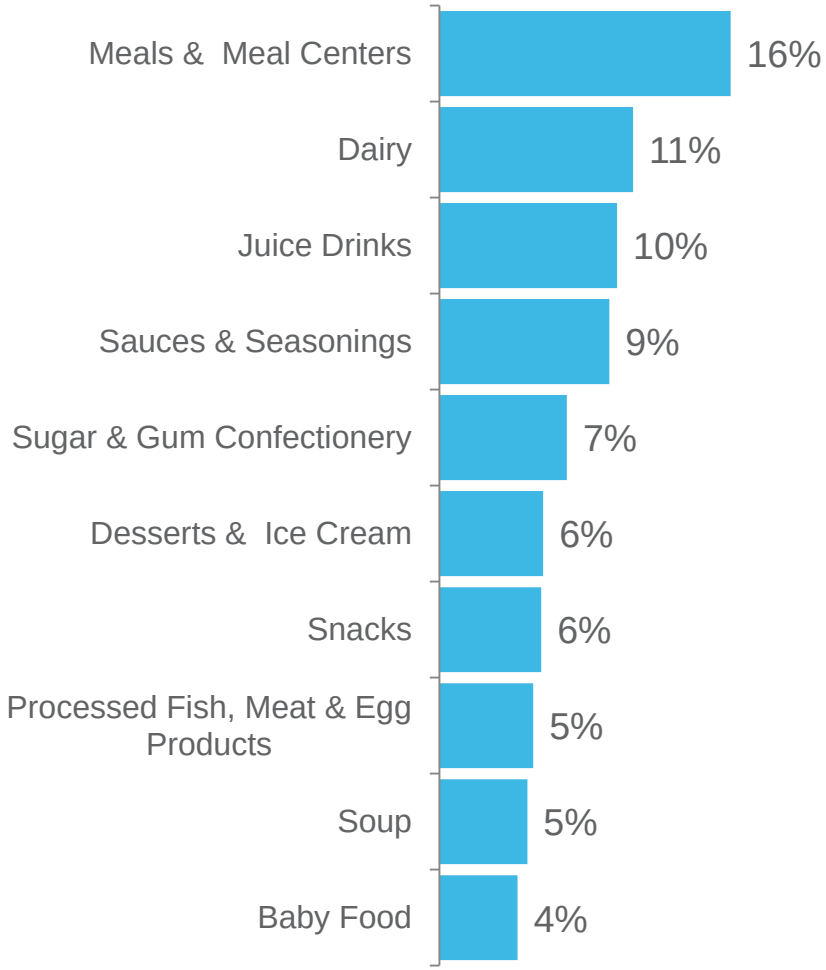
- The most active countries for launches in the last three months were UK, Germany and France.
- Meals remained the most common category for launches, followed by dairy and juice drinks.

Top Launch Countries



1833 Global Launches

Top Launch Categories



Number of Global Carrot NPD for the L3M N=1833

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Carrot Launches

Top Claims & Pack Formats Used

- Flexible packaging, tubs and bottles were the most common pack formats globally, consistent with formats in Europe and Asia Pacific.
- The key claim was centred around health, including no additive/ preservatives, while ethical – environmentally friendly, low/no/reduced allergen and microwavable were also commonly used claims.

Pack Formats Used

Global	Flexible	26%
	Tub	18%
	Bottle	15%
Europe	Tub	25%
	Flexible	24%
	Bottle	15%
Asia Pacific	Flexible	32%
	Tub	14%
	Bottle	12%

Top Claims Used

Global	No Additives/Preservatives	28%
	Ethical - Environmentally Friendly Package	18%
	Low/No/Reduced Allergen	13%
Europe	No Additives/Preservatives	24%
	Ethical - Environmentally Friendly Package	20%
	Low/No/Reduced Allergen	14%
Asia Pacific	No Additives/Preservatives	38%
	Microwaveable	21%
	Time/Speed	19%

Number of Global Carrot NPD for the L3M N=1833

Innovative Carrot Launches:
L3M (August – October 2015)

V8 Chocolate Raspberry Protein Shakes (USA)

V8 Chocolate Raspberry Protein Shakes comprise milk, soy, quinoa, brown rice and pea proteins blended with rich cocoa, real honey and a hint of raspberry flavor to provide energy. The naturally and artificially flavored shake contains 12g of protein, 3g of fiber and 120 calories, and is free of high fructose corn syrup. The beverage is said to be an excellent source of protein, provide as much fiber as a cup of kale, as much calcium and vitamin D as a glass of milk, and a quarter cup of vegetables.

Claims:
Other (Functional), Ethical - Environmentally Friendly Package

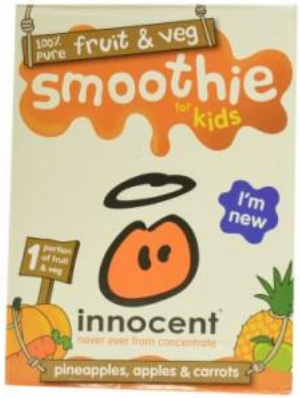
Tesco Lotus Im Im Crab Fried Rice (Thailand)

Tesco Lotus Im Im Crab Fried Rice has been repackaged with a new design. This microwaveable product retails in a 210g pack with the Facebook link.

Claims:
Social Media, Microwaveable

Innocent Smoothie for Kids Pineapples, Apples & Carrots Smoothie (UK)

Innocent Smoothie for Kids Pineapples, Apples & Carrots Smoothie contains 100% pure fruit and vegetable and no concentrate, added sugar or preservatives. This product provides one portion of fruit and veg, and is designed to make kids eat vegetables. It is ideal for lunch boxes, and retails in a recyclable pack of 4 x 180ml recyclable cartons, featuring the Rainforest Alliance Certified and FSC Mix Board logos.



Claims:
No Additives/Preservatives, Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Low/No/Reduced Sugar, Ethical - Human, Ethical - Charity, Children (5-12), On-the-Go

Müller Sip 1.5% Bio Yogurt Drink with Orange and Carrot (Israel)

Müller Sip 1.5% Bio Yogurt Drink with Orange and Carrot is low in lactose and preservative free. This kosher certified product contains 20% fruit and vegetables, and retails in a 250g pack.

Claims:
Low/No/Reduced Lactose, No Additives/Preservatives, Low/No/Reduced Allergen, Kosher

Source: Mintel (2015)

Innovative Carrot Launches:
L3M (August – October 2015)

Suja Essentials Organic Carrot Crush Juice (USA)

Suja Essentials Organic Carrot Crush Juice has been repackaged and is now available in a larger 59-fl.oz. BPA-free bottle. This cold pressured vegetable and fruit juice is made with carrot, apple, orange, lime and ginger. It is produced using Cold Pressure, also known as High Pressure Processing (HPP), instead of high heat, which is said to extend shelf life and to help maintain essential vitamins, minerals and enzymes.

Claims:
Low/No/Reduced Allergen, GMO-Free, Gluten-Free, Vegan, Kosher, Organic, No Animal Ingredients

Amipro Colon Ecology Gastrointestinal Health Supplement (South Africa)

Amipro Colon Ecology Gastrointestinal Health Supplement has been relaunched with an improved formula and a new look with vegicaps. This unique proprietary blend of high quality soluble and insoluble fibre, herbal concentrates, enzymes and beneficial probiotics provides complete fibre and probiotic support with herbs and enzymes that maintain healthy colon ecology and intestinal acid-alcaline balance and promote routine elimination

Claims:
Vegetarian, Digestive (Functional)

Hennig Olsen SmoothIS Frozen Smoothie (Norway)

Hennig Olsen SmoothIS Frozen Smoothie is made with 100% fruit, berries and vegetables, and contains only natural ingredients. The product retails in a 90ml pack.

Claims:
All Natural Product

Granini de La Huerta Tomato, Pineapple & Carrot Nectar (Spain)

Granini de La Huerta Tomate, Piña y Zanahoria (Tomato, Pineapple & Carrot Nectar) is formulated with 55% fruit and contains vitamins C and E. The product retails in a 1L pack featuring the Facebook and Twitter logos.

Claims:
Social Media

Source: Mintel (2015)

Innovative Carrot Launches:
L3M (August – October 2015)

Haoxiangni / Hao Xiang Ni Assorted Jujube Slices (China)

Haoxiangni / Hao Xiang Ni Zao Pian Zu He Zhuang (Assorted Jujube Slices) come with two 17.5g units of original, a 17.5g wild jujube, and a 17.5g ejiao flavours. The jujube slices are made using selected jujube and processed according to pulping and four grinding procedures to make the jujube powder finer and easier to be absorbed by the body.

Claims:
N/A

Osius The Bone Broth Co Chicken Broth with Herbs (UK)

Osius The Bone Broth Co Chicken Broth with Herbs is made with 100% organic chicken bones, and is free of gluten, dairy and added salt. This product retails in a 520ml pack featuring the EU Leaf logo, and was on display at the Speciality & Fine Food Fair 2015 in Olympia, London.

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

AH Sla Verrijker Grilled Vegetable Mix (Netherlands)

AH Sla Verrijker Gegrilde Groente Mix (Grilled Vegetable Mix) is now available. The microwaveable product comprises grilled bell pepper, courgette and carrot, and can be used hot or cold to enrich salads, pizza or pasta dishes, but can also be consumed on bread. It is free from additives, gluten and milk, and retails in a 250g pack which features the Gezondere Keuze (Healthy Choice) logo.

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

MaXsport Veggie Protein Wholegrain Crackers with Sesame (Germany)

MaXsport Veggie Protein Vollkornkräcker mit Sesam (Wholegrain Crackers with Sesame) are now available. They provide 20% protein and are high in fibre. This 100% natural product does not contain added sugar, gluten or GMO, is certified as kosher and suitable for vegans and retails in a 36g pack.

Claims:
All Natural Product, Low/No/Reduced Allergen, GMO-Free, High/Added Fiber, Vegan, Kosher, Low/No/Reduced Sugar, Gluten-Free, No Animal Ingredients, Wholegrain

Source: Mintel (2015)

Top Australian Carrot Launches:
L3M (August – October 2015)

McKenzie's From the Kitchen Country Pumpkin & Lentil Soup

Yolo Energy Hop Cold Pressed Juice

Avon Skin So Soft Silky Moisture Collagen Body Lotion

Avon Anew Advanced All-in-One Max Self-Adjusting Perfecting Cream SPF15

Street Food Meal Pots Chicken Noodle Pad Thai

Allen's Party Mix

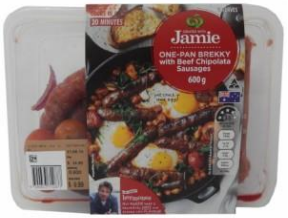
On The Menu Roast Range Roast Beef

Nectar Cold Pressed Eagle Eye Carrot, Apple, Orange, Pineapple, Lemon and Turmeric Nectar

Yummia Apple & Carrot Layered Yogurt

Latina Fresh Slow Cooked Shredded Beef in a Tomato & Red Wine Ragu

Woolworths Created with Jamie One-Pan Brekky with Beef Chipolata Sausages



Green's Classic Carrot Cake Mix

Source: Mintel (2015)

Cauliflower.

Purchase and consumption of cauliflower is relatively on trend with previous months.

Cauliflower is typically purchased from mainstream retailers, Coles and Woolworths.

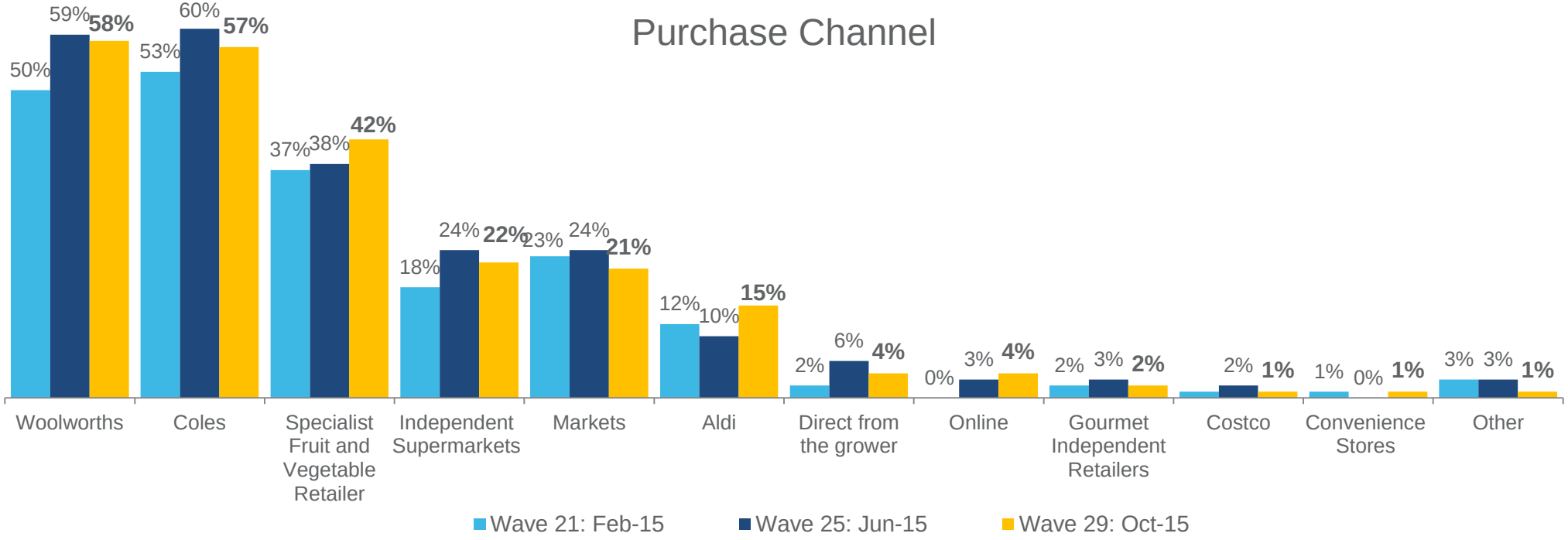
Average Purchase **3.4** times per month

▼ 3.2 times, Wave 21
▼ 3.2 times, Wave 25

Average Consumption **8.1** times per month

▼ 7.8 times, Wave 21
▲ 8.6 times, Wave 25

Purchase Channel



Q1. On average, how often do you purchase cauliflower?
Q2. On average, how often do you consume cauliflower?
Q5. From which of the following channels do you typically purchase cauliflower?
Sample Wave 21 N=310, Wave 25 N=305, Wave 29 N=301

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 purchases **1.0kg** of cauliflower, consistent with past months.

- ▼ 0.9kg, Wave 21
- — 1.0kg, Wave 25

Recalled last spend

Recalled last spend on cauliflower is **$3.30,** returning to the same price tracked in Wave 21.

- — $3.30, Wave 21
- ▲ $3.50, Wave 25

Value for money

Consumers perceive cauliflower to be relatively good value for money **(6.6/10)**, increasing upon previous waves.

- ▼ 6.1/10, Wave 21
- ▼ 6.0/10, Wave 25

Q3. How much cauliflower do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? 0-10 scale
Sample Wave 21 N=310, Wave 25 N=305, Wave 29 N=301

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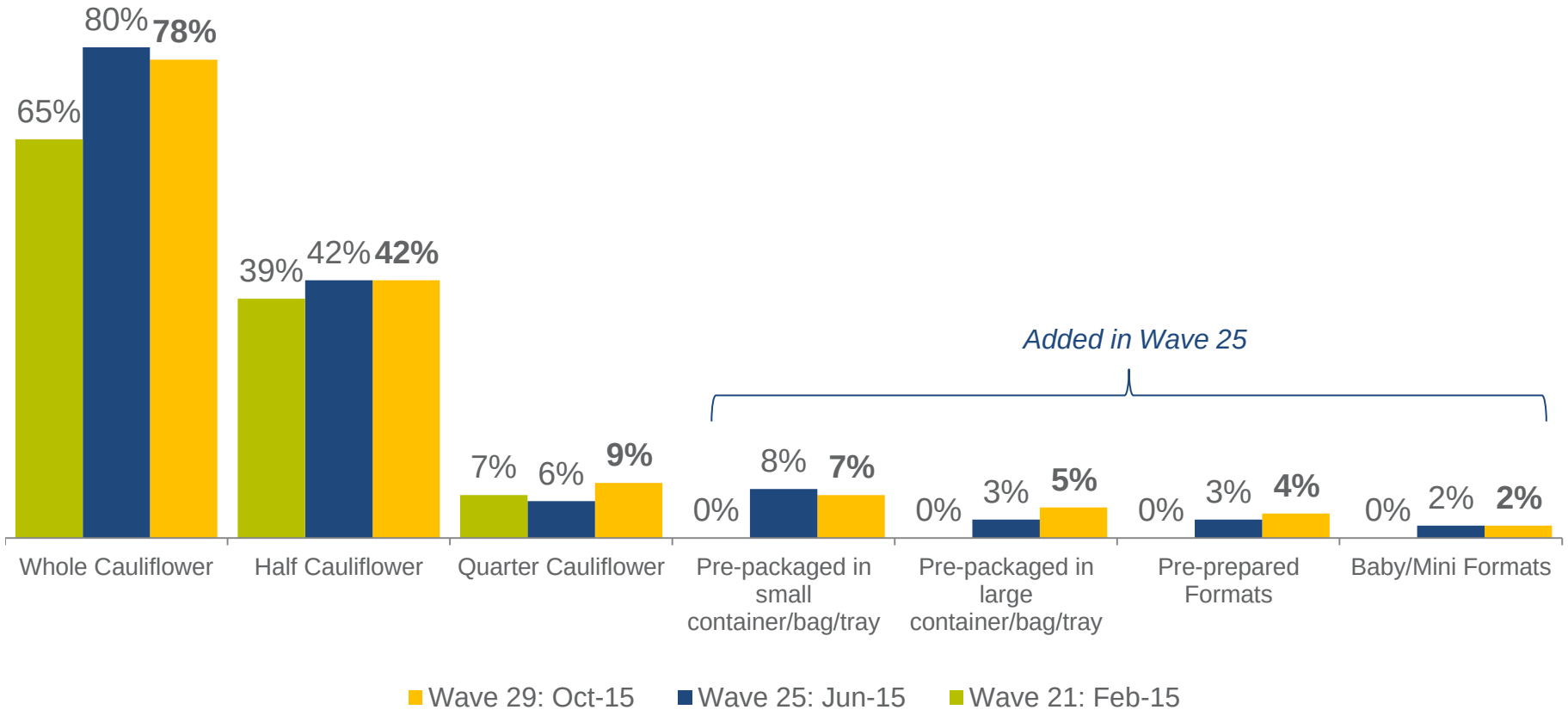
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Whole heads of cauliflower continue to be the main format purchased, with half cauliflowers also a popular format option. Pre-packaged products make up a small portion of the formats purchased.



Q4b. In what fresh formats do you typically purchase cauliflower?
Sample Wave 21 N=310, Wave 25 N=305, Wave 29 N=301

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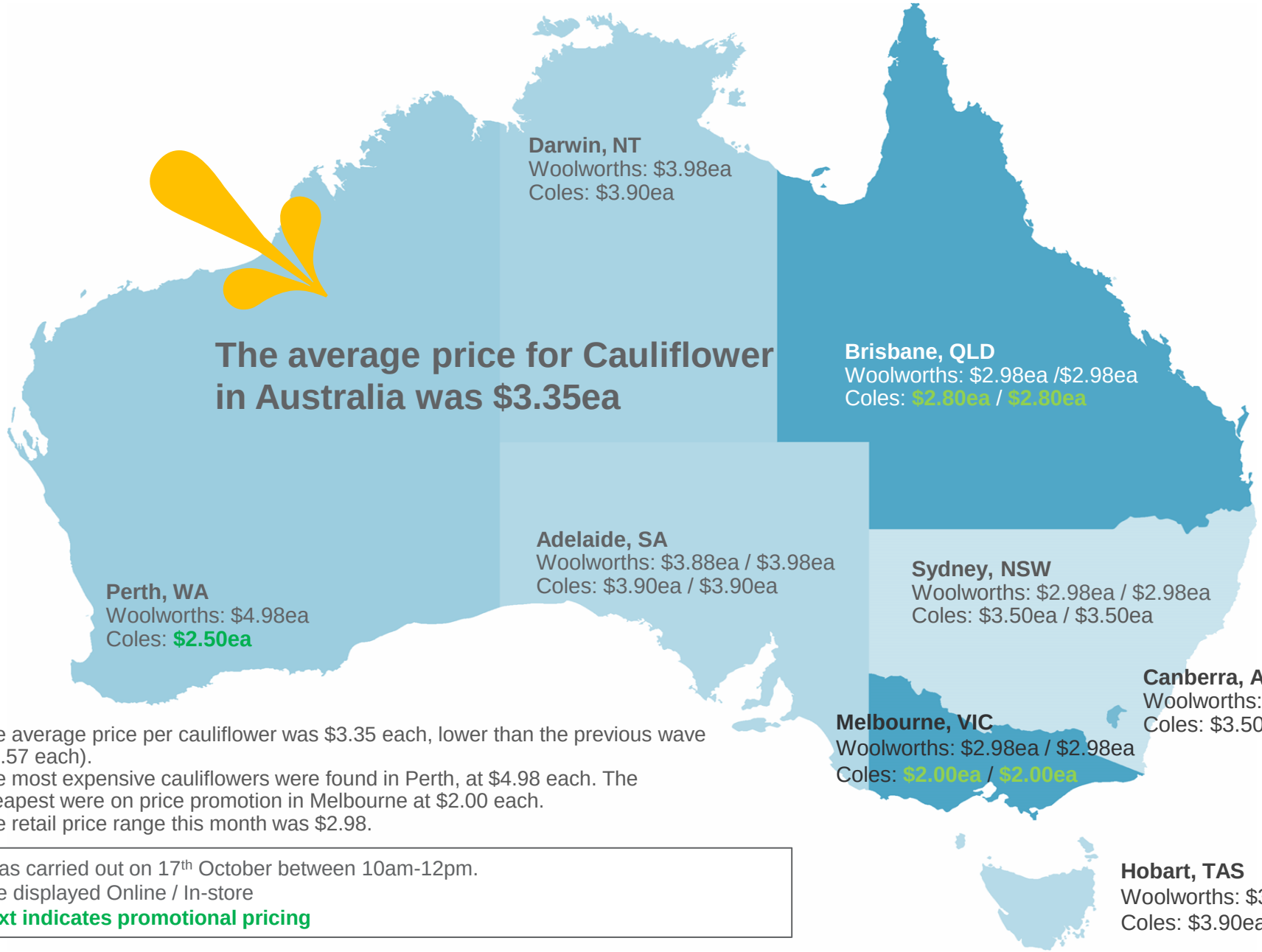
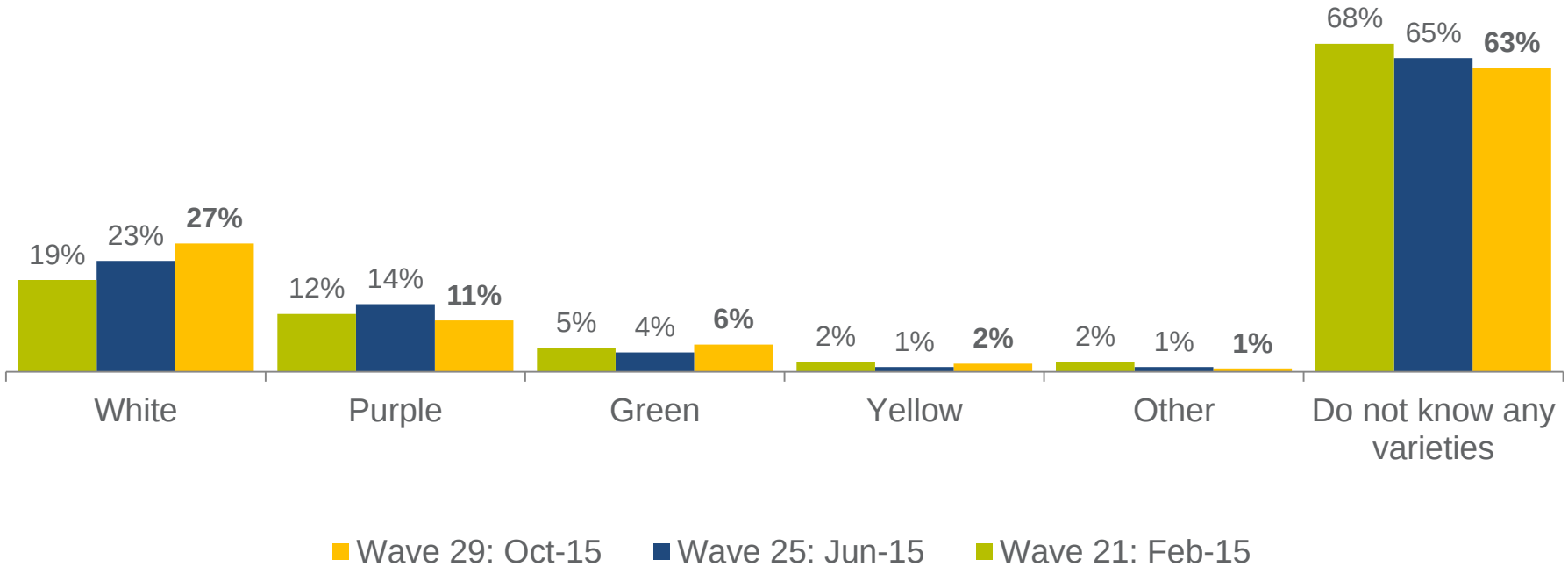
Online and In-store Commodity Prices



- The average price per cauliflower was $3.35 each, lower than the previous wave ($4.57 each).
- The most expensive cauliflowers were found in Perth, at $4.98 each. The cheapest were on price promotion in Melbourne at $2.00 each.
- The retail price range this month was $2.98.

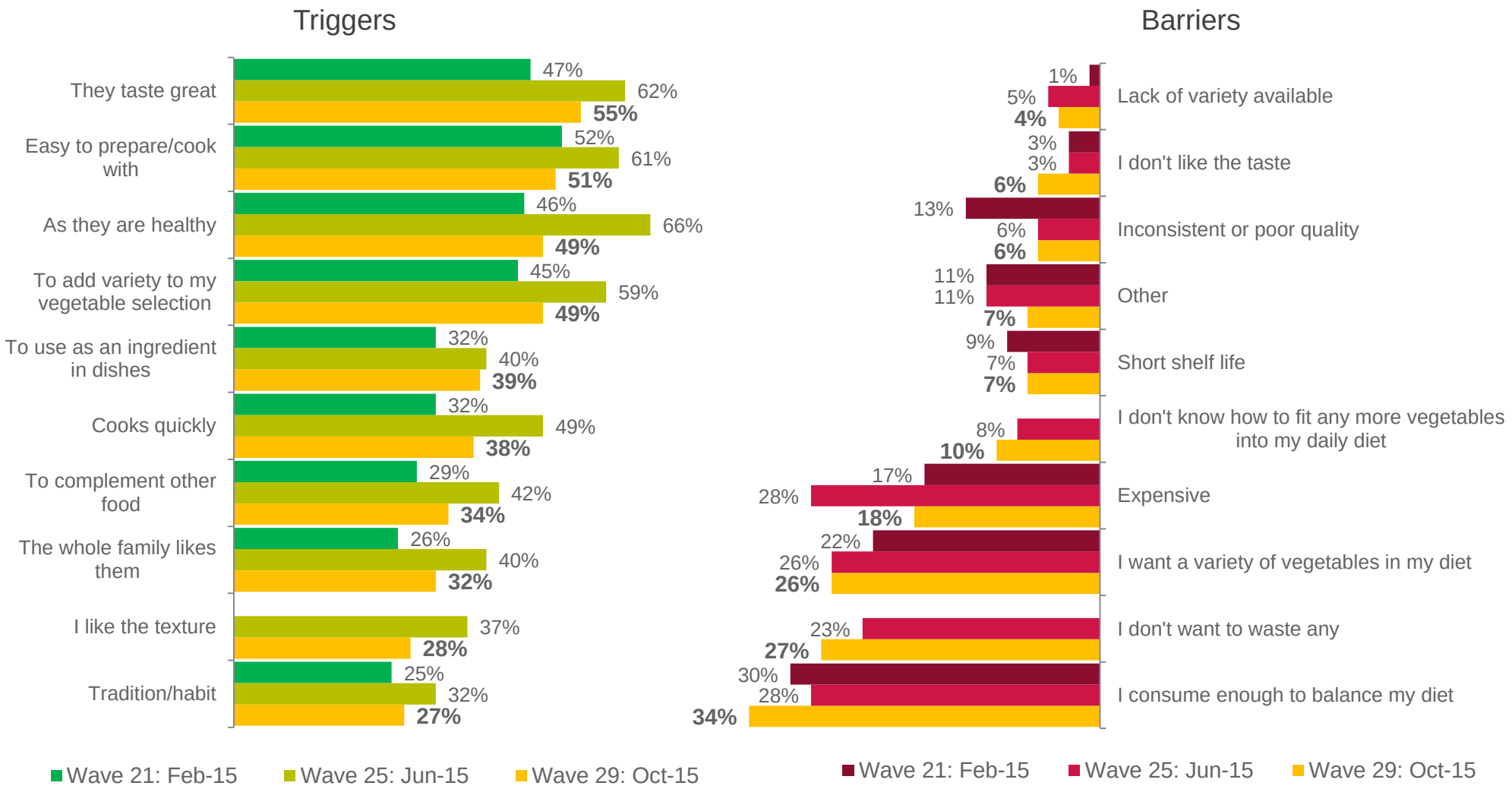
Pricing was carried out on 17th October between 10am-12pm.
Prices are displayed Online / In-store
Green text indicates promotional pricing

Spontaneous awareness remains very low. Consumers are most likely to recall white and purple as the main varieties of cauliflower.



Q6a. What varieties of cauliflower are you aware of? (unprompted)
Sample Wave 21 N=310, Wave 25 N=305, Wave 29 N=301

Taste, ease of preparation and health are the primary influences on purchase. Already consuming enough and not wanting to waste any are the key barriers inhibiting purchase.



Q7. Which of the following reasons best describes why you purchase cauliflower?
Q8. Which reason best describes why you don't buy cauliflower more often?
Sample Wave 21 N=310, Wave 25 N=305, Wave 29 N=301

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Consumers prefer to use cauliflower in Australian and Asian cuisine. This wave also sees a slight increase in British cuisine.

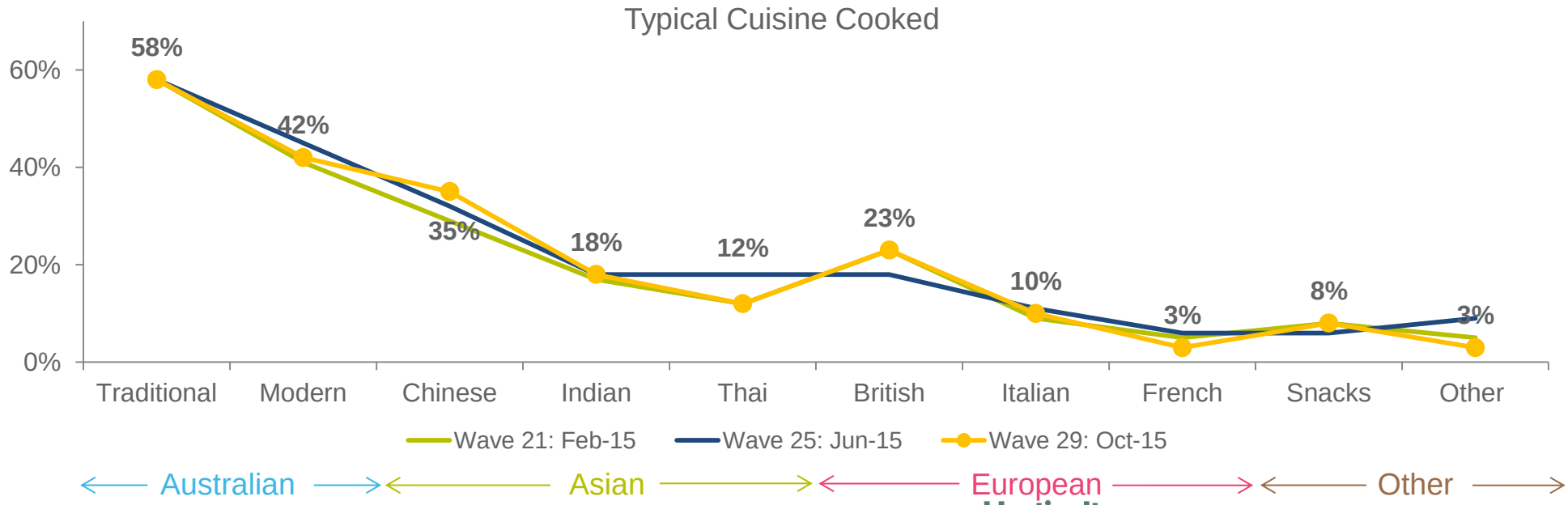
Dinners and family meals are the key meal occasions.

Top 5 Consumption Occasions

	Wave 25	Wave 29
Dinner	81%	**75%**
Family Meals	64%	**59%**
Weekday Meals	50%	**47%**
Weekend Meals	43%	**41%**
Quick Meals	32%	**32%**

13% used cauliflower when cooking a new recipe

▼ 12%, Wave 21
▲ 17%, Wave 25



Q10. What cuisines do you cook/consume that use cauliflower?
Q11. Which of the following occasions do you typically consume/use cauliflower?
Sample Wave 21 N=310, Wave 25 N=305, Wave 29 N=301

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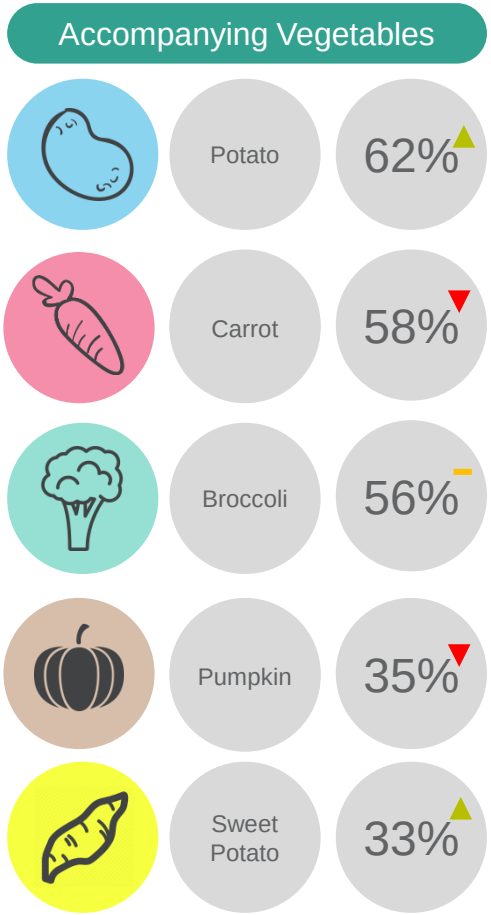
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Cauliflower is generally steamed, cooked in stir fries and boiled. The last three waves have seen a steady increase in roasting.

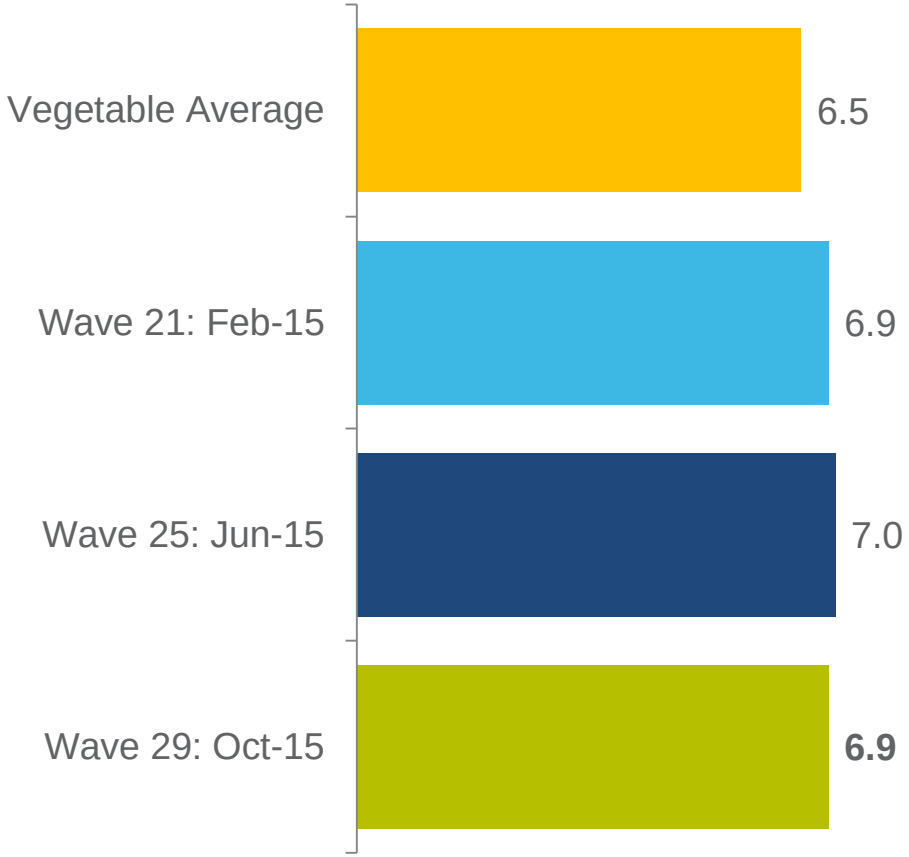
Potatoes and carrots are consistently served with cauliflower.

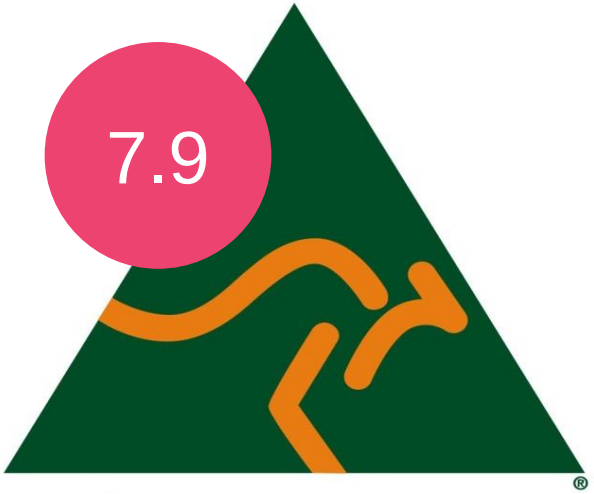


Top 10 Cooking Styles			
	Wave 21	Wave 25	Wave 29
Steaming	56%	61%	**63%**
Stir frying	38%	46%	**45%**
Boiling	41%	40%	**41%**
Soup	23%	32%	**28%**
Microwave	21%	21%	**22%**
Baking	19%	20%	**18%**
Roasting	8%	14%	**17%**
Raw	12%	16%	**14%**
Slow Cooking	11%	14%	**14%**
Sautéing	8%	10%	**11%**

Q9. How do you typically cook cauliflower?
Q10a. And when are you serving cauliflower which of the following do you also serve together with this?
Sample Wave 21 N=310, Wave 25 N=305, Wave 29 N=301

Cauliflower has remained relatively stable over the past three waves and is above the Vegetable Average. Knowing that cauliflower is grown in Australian remains the most important provenance information to consumers.





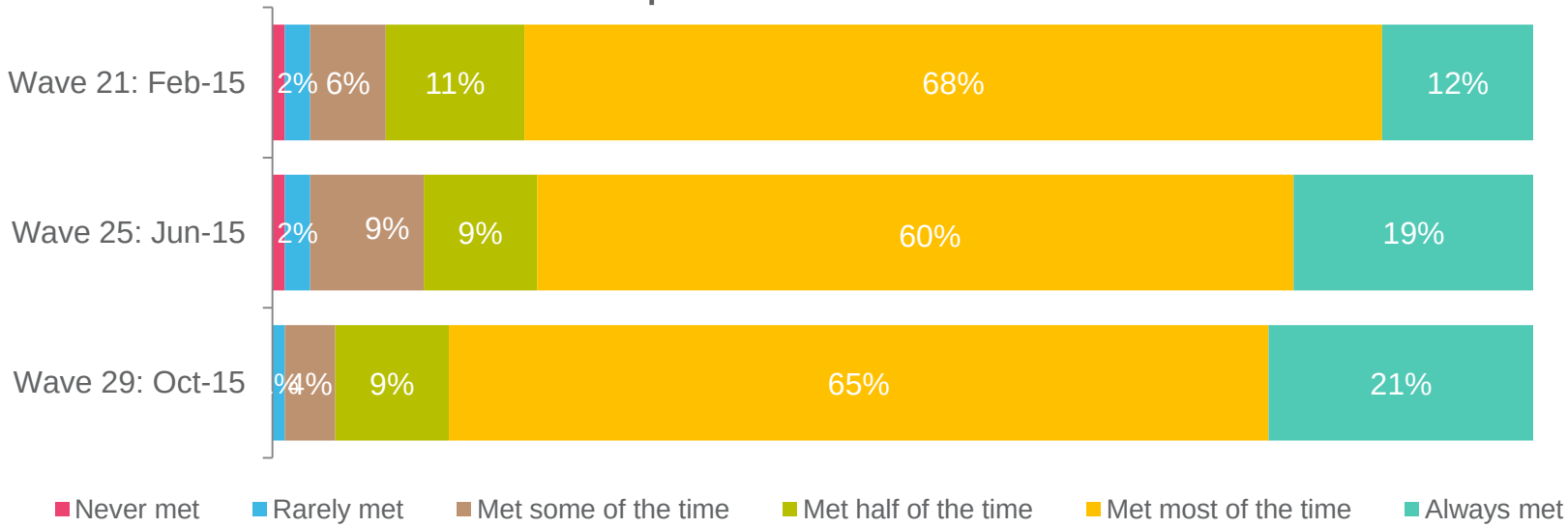
Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 21 N=310, Wave 25 N=305, Wave 29 N=301

Cauliflower is expected to remain fresh for around nine days once purchased. Expectations of freshness are continually being met.

Expected to stay fresh for **9.1** days

▼ 8.6 days, Wave 21
▲ 9.4 days, Wave 25

Expectations Met



Q12. How long do you expect cauliflower to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy cauliflower?
Sample Wave 21 N=310, Wave 25 N=305, Wave 29 N=301

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

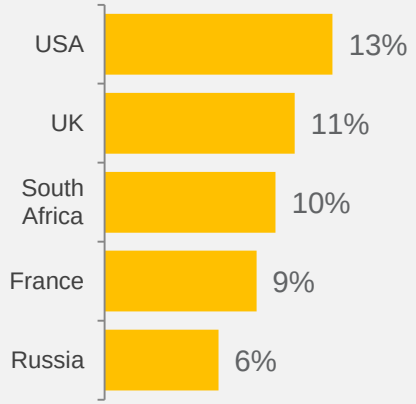
Cauliflower Product Launch Trends.

Cauliflower Global NPDs

August – October 2015

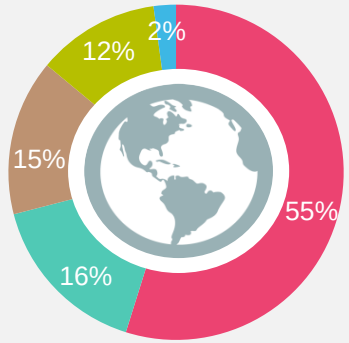
There were 93 products launched in the past three months that contained cauliflower. Europe and Asia Pacific were the main regions for launches, with USA and UK the key countries. Flexible packaging remained the most common format. Launches were predominately in fruit and vegetable, sauces and meals categories.

Country

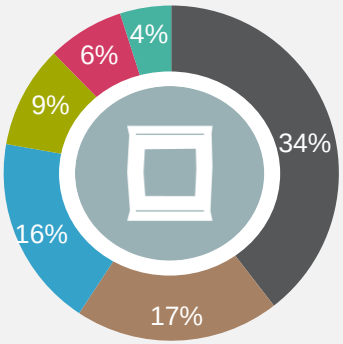


93 Global NPDs

Region



Top Pack Formats



Categories

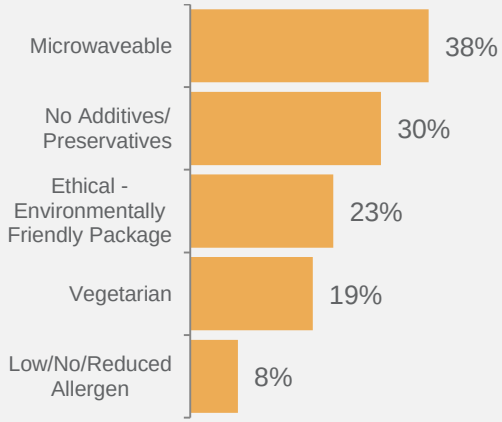
Fruit & Vegetables 28%

Meals 20%

Sauces & Seasonings 19%

Soup 9%

Top Claims



Cauliflower Product Launches:
Last 3 Months (August – October 2015)
Summary

- There were 93 products launched over the past 3 months that contained cauliflower as an ingredient, a slight decline from the previous wave.
- There were two cauliflower products launched in Australia in the past three months.
- More than half of the products were launched in Europe (55%), with USA and UK the key launch countries.
- Flexible (34%), tray (17%), and jar (16%) packaging were the top 3 pack formats.
- The top categories for launches were fruit and vegetables (28%), meals and meal centers (18%), and sauces and seasonings (25%).
- Convenience and health claims were typically used on products, including microwaveable (38%), no additives/preservatives (30%), and environmentally friendly packaging (23%). These have been consistent with all previous waves tracked for cauliflower products.
- The most innovative cauliflower launch this wave was the breaded cauliflower from Slovakia. See following pages for examples of product launches.

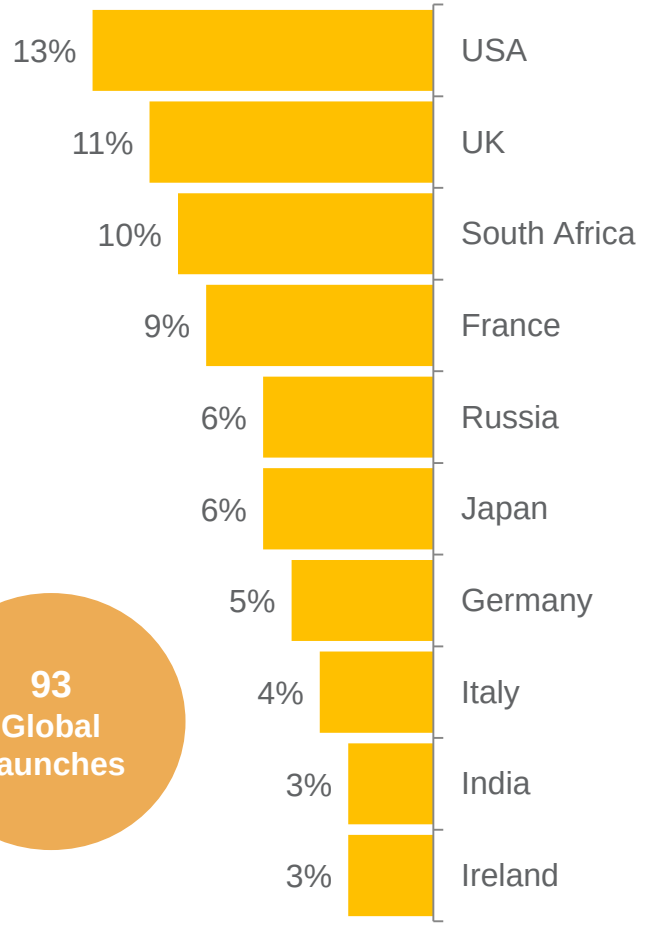
Source: Mintel (2015)

Cauliflower Launches

Country, Region & Categories

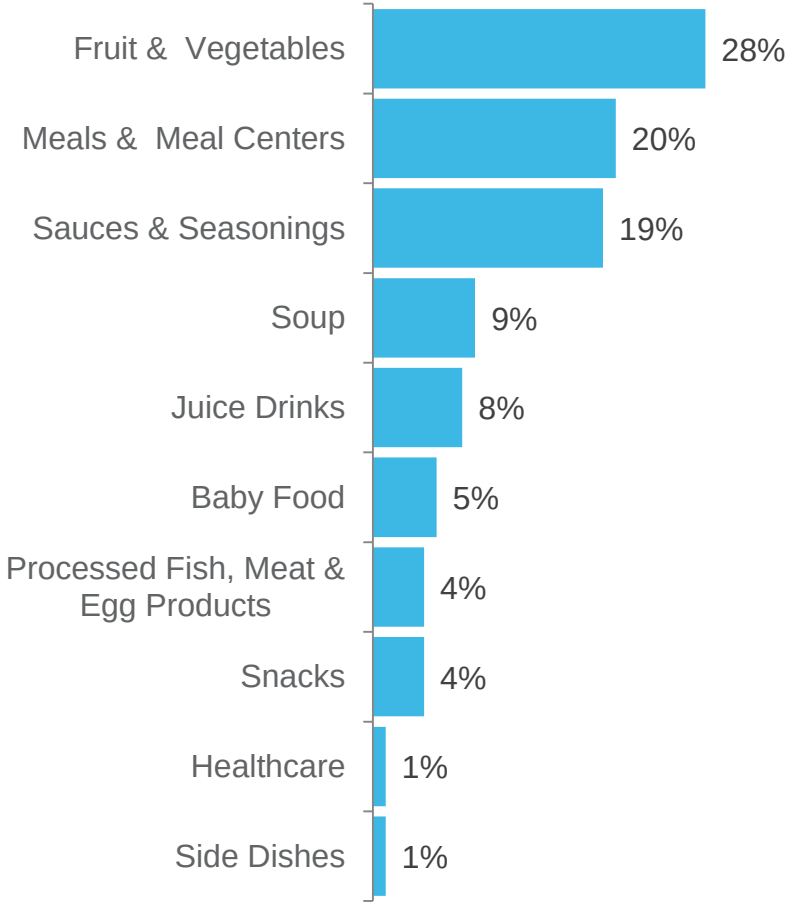
- The three key countries for cauliflower launches and innovation were[73] USA, UK and South Africa.
- Products containing cauliflower were launched across multiple categories including fruit and vegetables, meals and sauces.

Top Launch Countries



93 Global Launches

Top Launch Categories



Number of Global Cauliflower NPDs for the L3M N=93

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Cauliflower Launches
Top Claims & Pack Formats Used

- Flexible packaging was the predominant format type for products launched in the last three months. Trays and jars were also common formats.
- Microwaveable was the key claim this wave, with no additives/preservatives and environmentally friendly packaging also popular claims.

Pack Formats Used

Global	Flexible	34%
	Tray	17%
	Jar	12%
Europe	Flexible	39%
	Tray	20%
	Jar	12%

Top Claims Used

Global	Microwaveable	38%
	No Additives/Preservatives	30%
	Ethical - Environmentally Friendly Package	23%
Europe	Microwaveable	45%
	Vegetarian	22%
	No Additives/Preservatives	20%

Number of Global Cauliflower NPDs for the L3M N=93
Only shown for Global and Europe as sample (other regions sample size for launches were N<30)

Innovative Cauliflower Launches:
L3M (August – October 2015)

Chazwinkle's Cauliflower & Friends (UK)

Chazwinkle's Cauliflower & Friends is said to be full of goodness and to naturally contain no artificial colours or preservatives. The product is recommended to be used in, on or with everyday cooking and retails in a 190ml pack featuring Facebook, Twitter, Instagram and Pinterest logos. The manufacturer states that they advocate seasonal eating and supporting British farmers.This product was on display at the Speciality & Fine Food Fair 2015 in Olympia, London.

Claims:
No Additives/Preservatives, Social Media

Atkins Roasted Turkey with Garlic Mashed Cauliflower (USA)

Atkins Roasted Turkey with Garlic Mashed Cauliflower comprises roasted turkey breast with garlic mashed cauliflower smothered in a traditional gravy. This microwavable USDA certified meal is low in carbohydrates, high in protein with 23g per serving, and free from preservatives. It retails in a 9-oz. pack.

Claims:
No Additives/Preservatives, High Protein, Slimming, Low/No/Reduced Carb, Microwaveable

Bofrost Chicken Strips in Mushroom Cream Sauce (Germany)

Bofrost Hähnchengeschnetzeltes in Champignon-Rahmsauce (Chicken Strips in Mushroom Cream Sauce) is now available. The microwaveable ready meal retails in a 600g pack, containing two 300g units.

Claims:
Ease of Use, Microwaveable

Eat Right Cauliflower Mash (South Africa)

Eat Right Cauliflower Mash is recommended for carb concious consumers. It can be served instead of potato mash as a side dish or as a topping on the favourite pie dish. The microwaveable product is suitable for lacto-vegetarians, provides 474 kilojoules per 150g serving, and retails in a 300g pack.

Claims:
Vegetarian, Microwaveable

Source: Mintel (2015)

Innovative Cauliflower Launches:
L3M (August – October 2015)

Woolworths Food Cauliflower Roasting Medley (South Africa)

Woolworths Food Cauliflower Roasting Medley contains baby marrow, sweet potato and red onion. The washed and ready-to-cook product is suitable for vegans and retails in an 800g pack.

Claims:
Ease of Use, Vegan, No Animal Ingredients

Ritebrand Stew Veggie Mix (South Africa)

Ritebrand Stew Veggie Mix has been repackaged in a 1kg pack with an updated design. It contains a seasonal mix of the following five vegetables: diced carrots; potato chunks and/or sweet potato chunks; pumpkin chunks and/or butternut chunks; cauliflower florets and/or broccoli florets; and sliced onions. The halal and kosher certified product is uncooked and microwaveable.

Claims:
Halal, Seasonal, Kosher, Microwaveable

Farley's Heinz Dinners Multigrain with Cauliflower, Broccoli and Cheese (Indonesia)

Farley's Heinz Dinners Makanan Pendamping Air Susu Ibu Bubuk Instan Rasa Kembang Kol, Brokoli dan Keju untuk Bayi dan Anak Usia 12-24 Bulan (Multigrain with Cauliflower, Broccoli and Cheese) is simple to prepare just by adding water. It is free from artificial colours, flavours, preservatives and gluten, and made with fortified milk. This smooth baby food contains calcium and iron for bone and teeth formation and density.

Claims:
No Additives/Preservatives, Vitamin/Mineral Fortified, Low/No/Reduced Allergen, Other (Functional), Ethical - Environmentally Friendly Package, Time/Speed, Ease of Use, Gluten-Free, Babies & Toddlers (0-4), Bone Health

Toppo Breaded Cauliflower (Slovakia)

Toppo Obalovaný Karfiol (Breaded Cauliflower) can be prepared in four to six minutes. The hand made product is retailed in a 600g pack.

Claims:
N/A

Source: Mintel (2015)

Innovative Cauliflower Launches:
L3M (August – October 2015)

Trader Giotto's Organic Riced Cauliflower (USA)

Trader Giotto's Organic Riced Cauliflower is said to be wonderful to use in place of rice or past as the base for a favorite sauce or protein. The USDA organic certified product can be prepared in a microwave or in an oven, and retails in a 12-oz. pack bearing the QAI logo.

Claims:
Organic, Microwaveable

Birds Eye Steamfresh Flavor Full Buffalo Cauliflower (USA)

Birds Eye Steamfresh Flavor Full Buffalo Cauliflower comprises spicy buffalo seasoned cauliflower florets. The microwaveable product cooks perfectly in the bag, and retails in a 9.5-oz. pack.

Claims:
Microwaveable

AH Fresh Dutch Meal with Roasted Chicken Fillet, Broccoli and Cauliflower (Netherlands)

AH Verse Hollandse Maaltijd (Fresh Dutch Meal with Roasted Chicken Fillet, Broccoli and Cauliflower) is now available. The microwaveable product comes with boiled potatoes, garden herbs and gravy, and retails in a 450g pack.

Claims:
Microwaveable

Garden Lites Spinach Soufflé (USA)

Garden Lites Spinach Soufflé is now available in a redesigned 7-oz. recyclable pack featuring Facebook and Twitter logos and a free BPA-free bowl. The microwavable product comprises spinach, whipped eggs and select spices. It provides 170 calories, 11g protein and 5g fiber, and contains the equivalent of two servings of vegetables. The kosher product is free from gluten, dairy, soy and nuts, and features a Weight Watchers PointsPlus value of 4.

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

Source: Mintel (2015)

Top Australian Cauliflower Launches:
L3M (August – October 2015)

Birds Eye Seasoned Sides Garden Medley Potato Wedges with Oil & Garlic

Birds Eye Seasoned Sides Garden Medley Potato Wedges with Oil & Garlic comprise a blend of potato wedges, carrot, broccoli, cauliflower and onion with oil and garlic. They are described as a perfect mix of lightly seasoned garden vegetables, and are said to provide a delicious side dish that can be pan fried, oven baked or microwaved. Each serving contains one serve of vegetables.

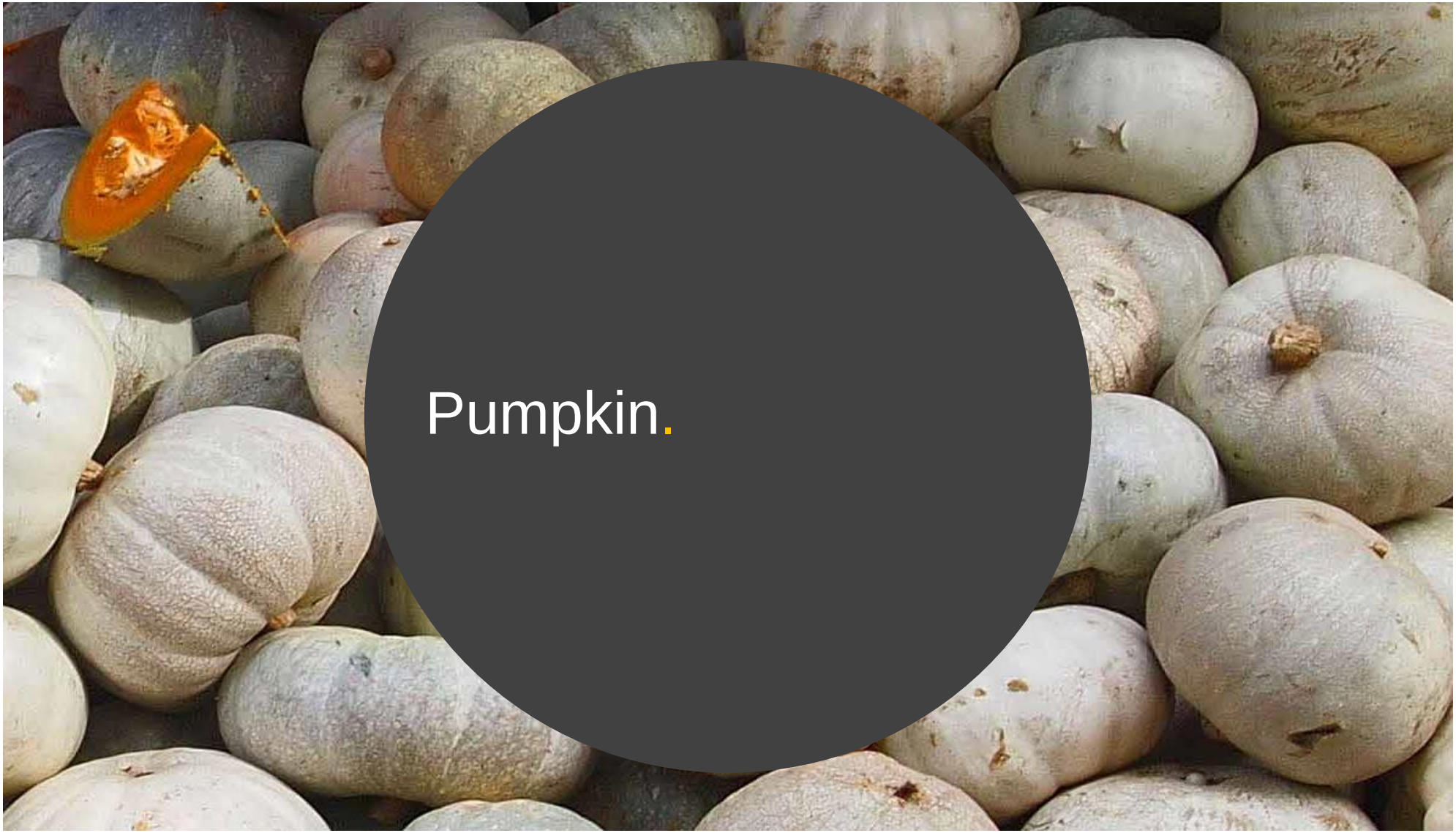
Claims:
No Additives/Preservatives, Ethical - Environmentally Friendly Package, Microwaveable

Woolworths Gold Vintage Cheddar Cauliflower Cheese

Woolworths Gold Vintage Cheddar Cauliflower Cheese comprises hand cut cauliflower florets cooked in an indulgent béchamel sauce, finished with Gold vintage farmhouse cheddar cheese. Made with Australian cauliflower, this meal carries an Australian Health Star Rating of 3.5 stars and contains no artificial colours or flavours. It retails in a 595g recyclable pack.

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

Source: Mintel (2015)



Pumpkin.

Consumption and purchase frequency have both declined this month.

Pumpkin is generally purchased from mainstream and specialist retailers. Independent supermarkets and Aldi are experiencing an increasing uplift in purchase.

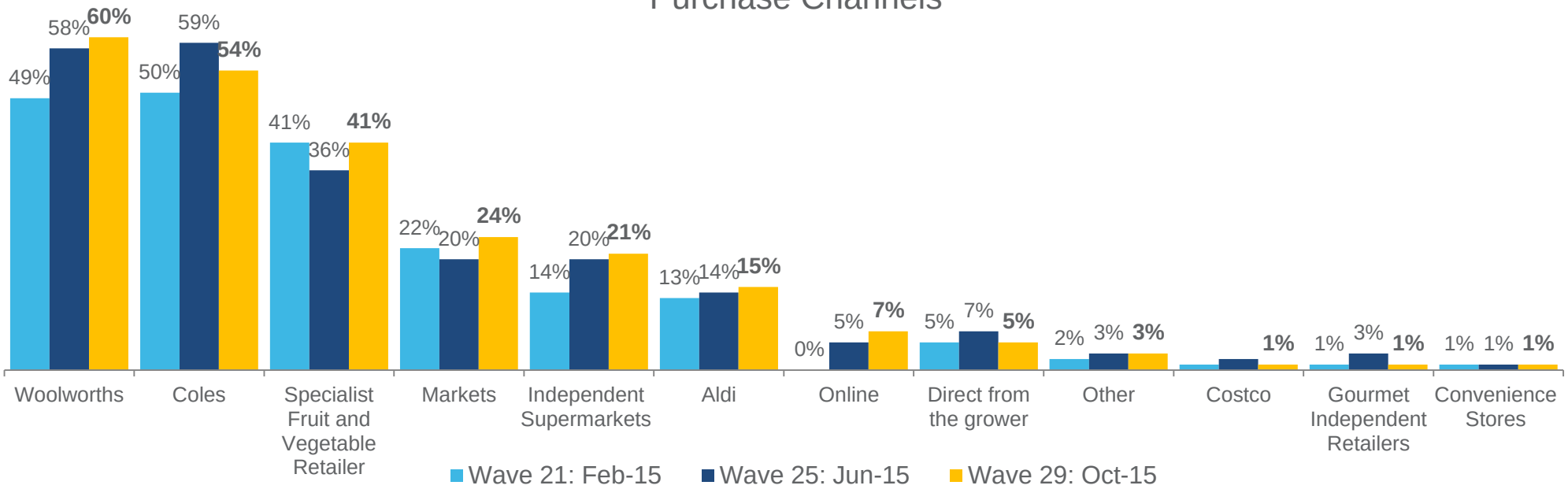
Average Purchase **3.0** times per month

Average Consumption **8.1** times per month

3.0 times, Wave 21
3.2 times, Wave 25

8.3 times, Wave 21
8.7 times, Wave 25

Purchase Channels



Q1. On average, how often do you purchase pumpkin?
Q2. On average, how often do you consume pumpkin?
Q5. From which of the following channels do you typically purchase pumpkin?
Sample Wave 21 N=311, Wave 25 N=304, Wave 29 N=305

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 purchases **1.2kg** of pumpkin, returning to the average in February 2014.

- 1.2kg, Wave 21
- ▲ 1.4kg, Wave 25

Recalled last spend

Recalled last spend on pumpkin is **$3.30**, marginally higher than the previous wave.

- $3.30 Wave 21
- ▼ $3.20, Wave 25

Value for money

Consumers' perceived pumpkin good value for money **(6.6/10)**, but is lower than averages recorded in the previous two waves.

- ▼ 6.8/10, Wave 21
- ▲ 7.2/10, Wave 25

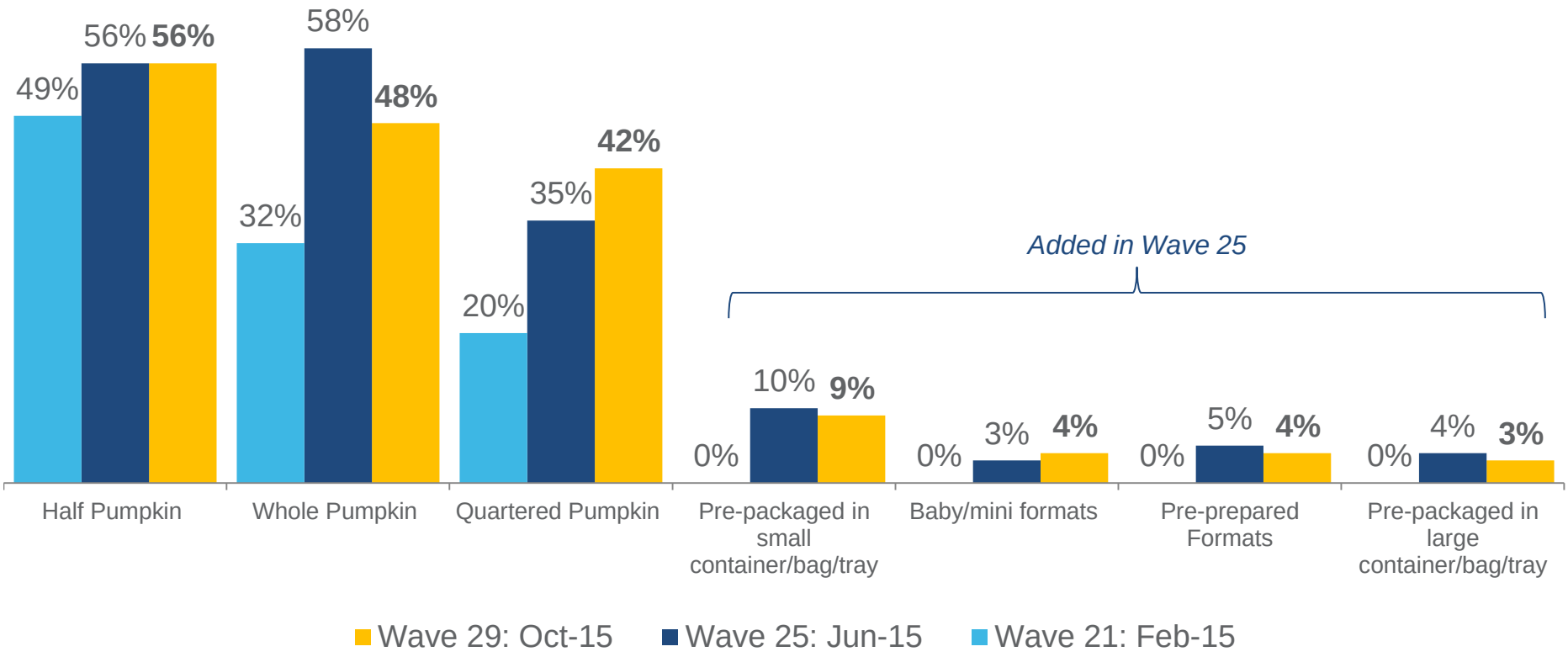
Q3. How much pumpkin do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 21 N=311, Wave 25 N=304, Wave 29 N=305

Horticulture Innovation Australia

colmar brunton.

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

Half pumpkins are the most commonly purchased format after a decline in whole pumpkins this wave. There has been an increasing trend of quartered pumpkins, suggesting that consumers are seeking small portions.



Q4b. In what fresh formats do you typically purchase Pumpkin?
Sample Wave 21 N=311, Wave 25 N=304, Wave 29 N=305

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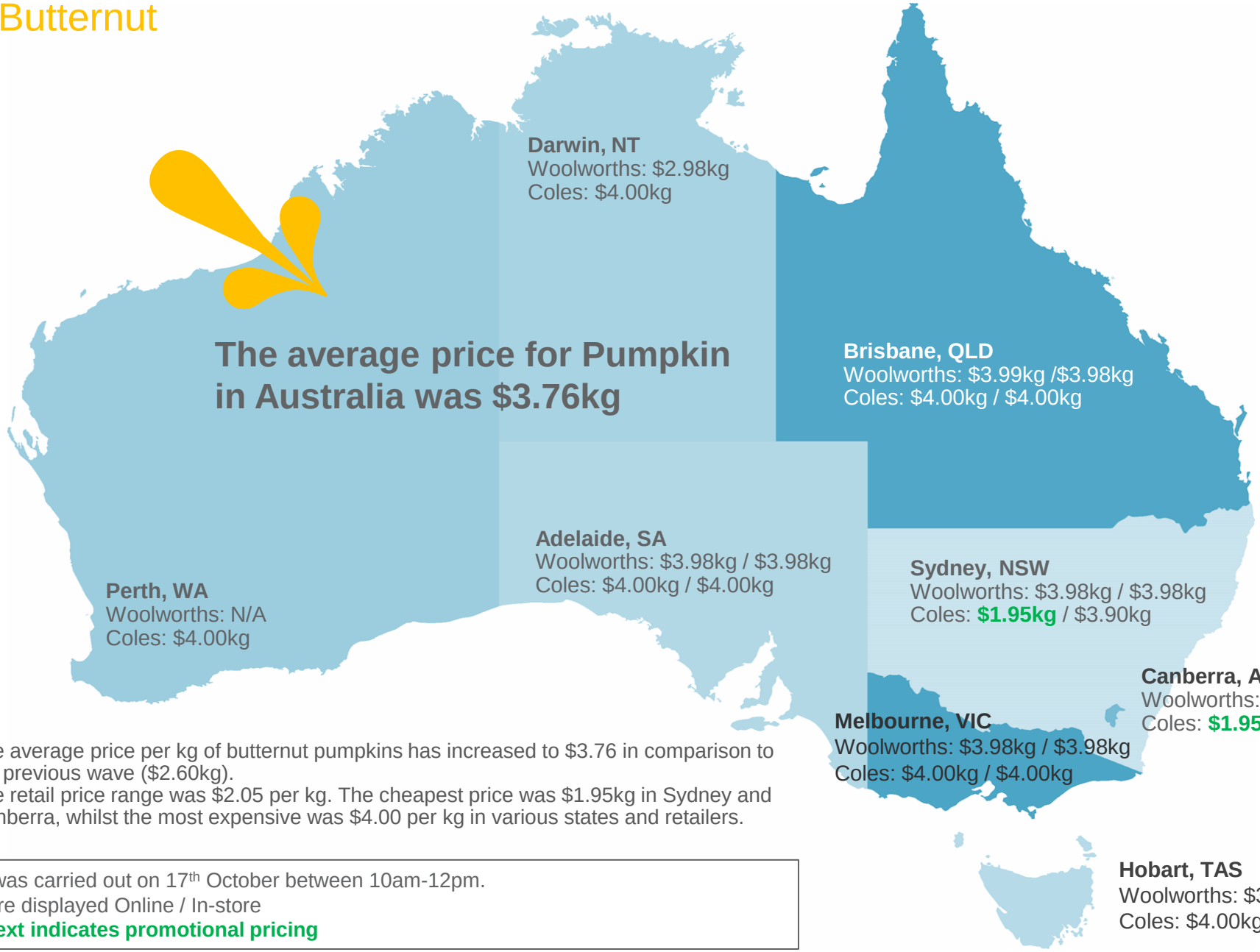
Online and In-store Commodity Prices

Butternut

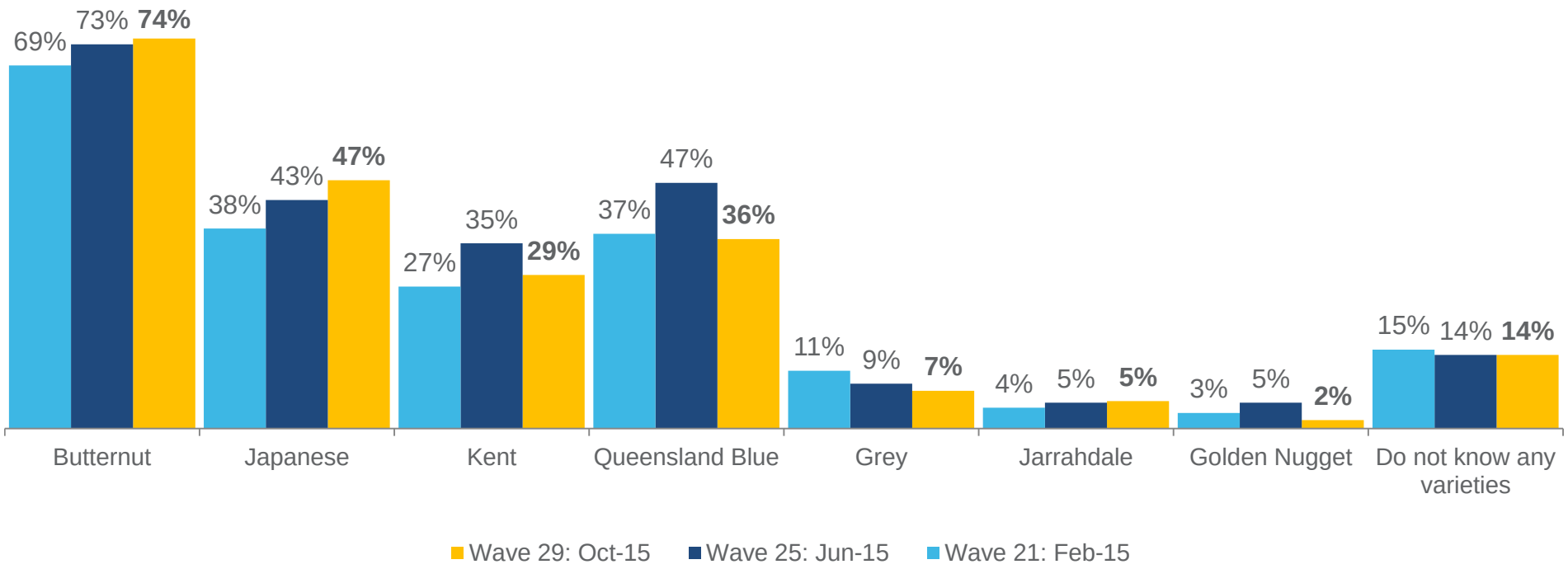


- The average price per kg of butternut pumpkins has increased to $3.76 in comparison to the previous wave ($2.60kg).
- The retail price range was $2.05 per kg. The cheapest price was $1.95kg in Sydney and Canberra, whilst the most expensive was $4.00 per kg in various states and retailers.

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

Spontaneous awareness of pumpkin types remains high, with positive recall across multiple types of pumpkin.

Awareness of Butternut and Jap pumpkin have steadily increased across waves, whereas there has been a significant decline in recall of Kent and Queensland Blue this wave.



Q6a. What varieties of pumpkin are you aware of? (unprompted)
Sample Wave 21 N=311, Wave 25 N=304, Wave 29 N=305

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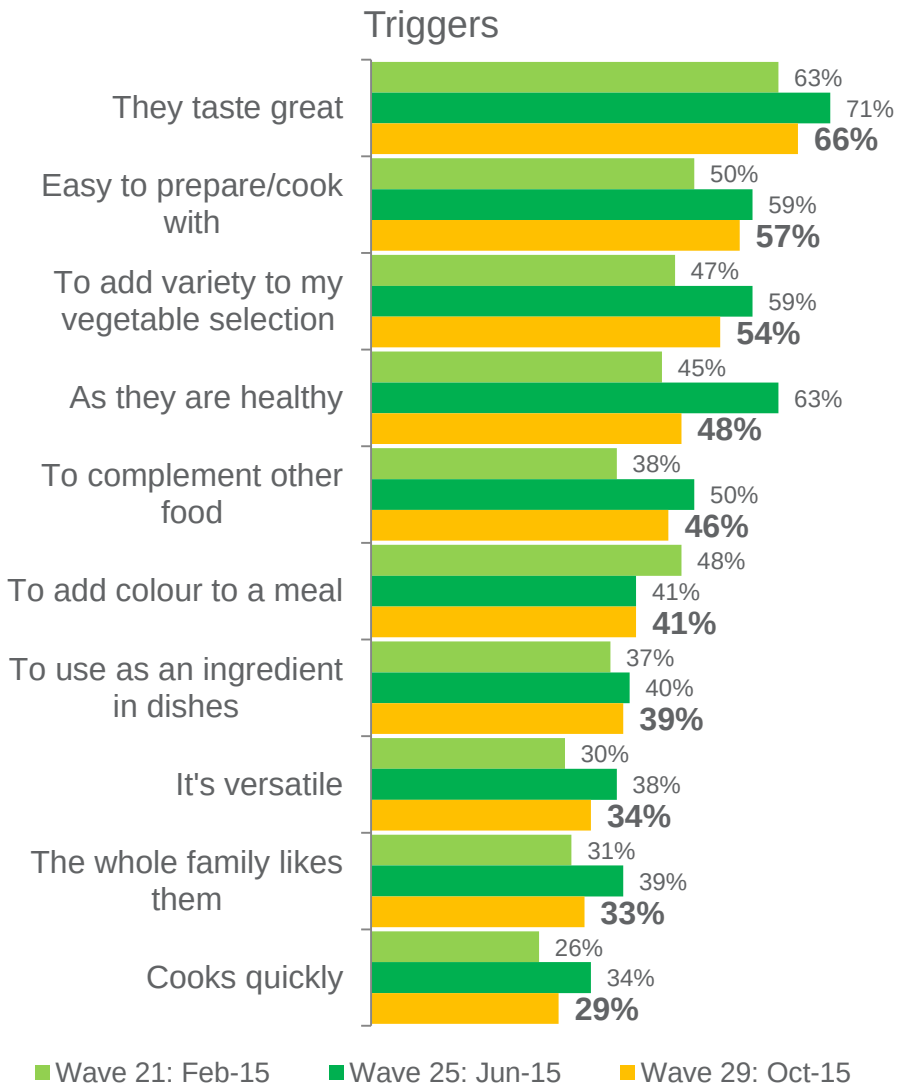
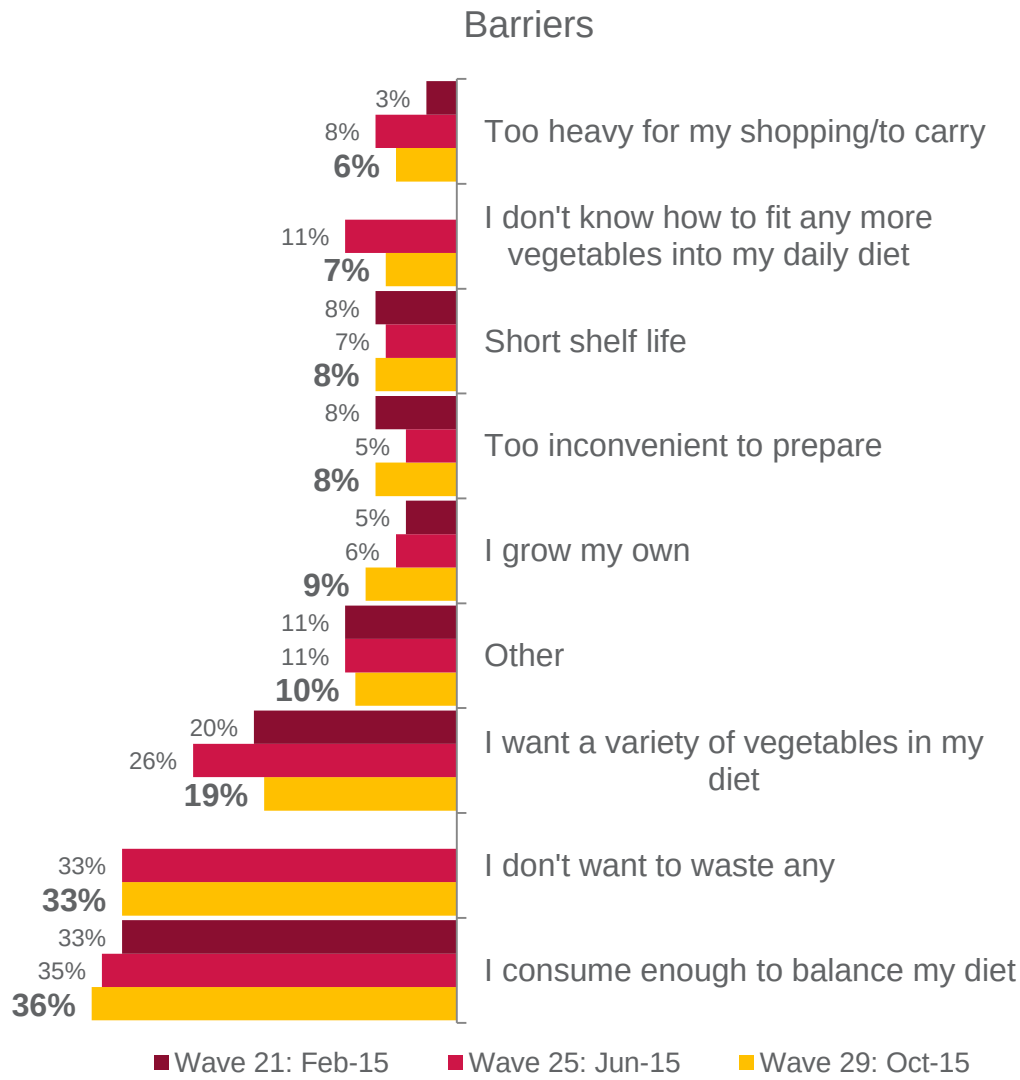
Taste and ease of preparation are the key drivers of pumpkin purchase. Perceptions of consuming enough for needs and not wanting to waste any remain the key barriers to purchase.





Q7. Which of the following reasons best describes why you purchase pumpkin?
Q8. Which reason best describes why you don't buy pumpkin more often?
Sample Wave 21 N=311, Wave 25 N=304, Wave 29 N=305

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Traditional Australian cuisine remains popular for pumpkin dishes, with minimal change over the last three waves.

Meal occasions generally occur at dinner time and for family meals.

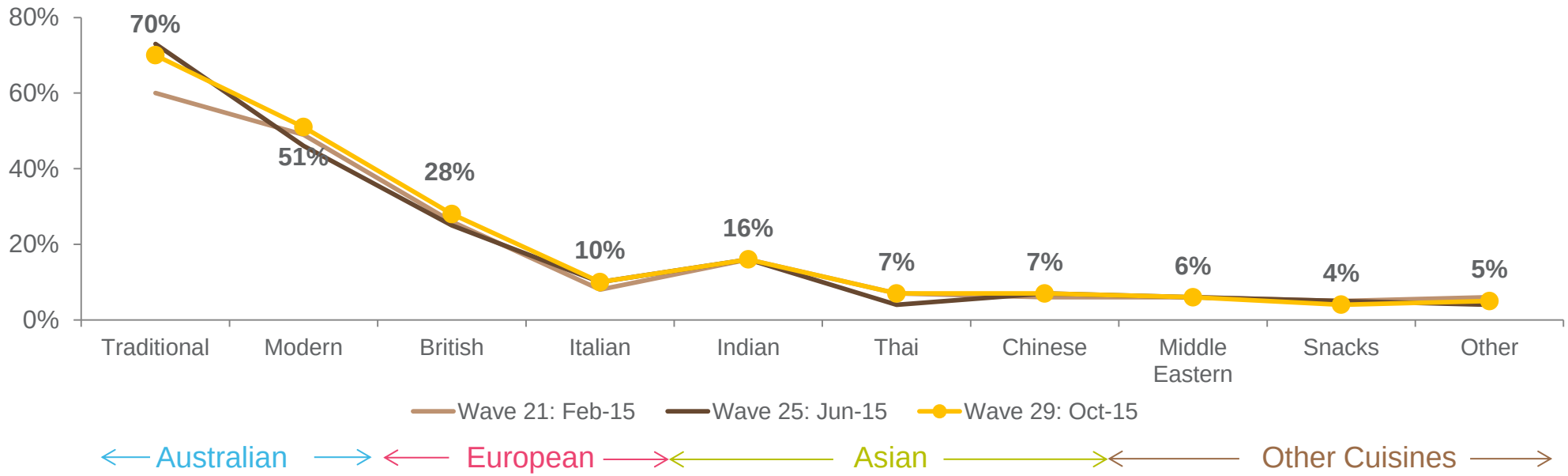
Top 5 Consumption Occasions

	Wave 25	Wave 29
Dinner	77%	**80%**
Family Meals	67%	**69%**
Weekday Meals	54%	**53%**
Weekend Meals	51%	**48%**
Quick Meals	22%	**25%**

15% used pumpkin when cooking a new recipe

▼ 12%, Wave 21
▲ 16%, Wave 25

Typical Cuisine Cooked



Q10. What cuisines do you cook/consume that use pumpkin?
Q11. Which of the following occasions do you typically consume/use pumpkin?
Sample Wave 21 N=311, Wave 25 N=304, Wave 29 N=305

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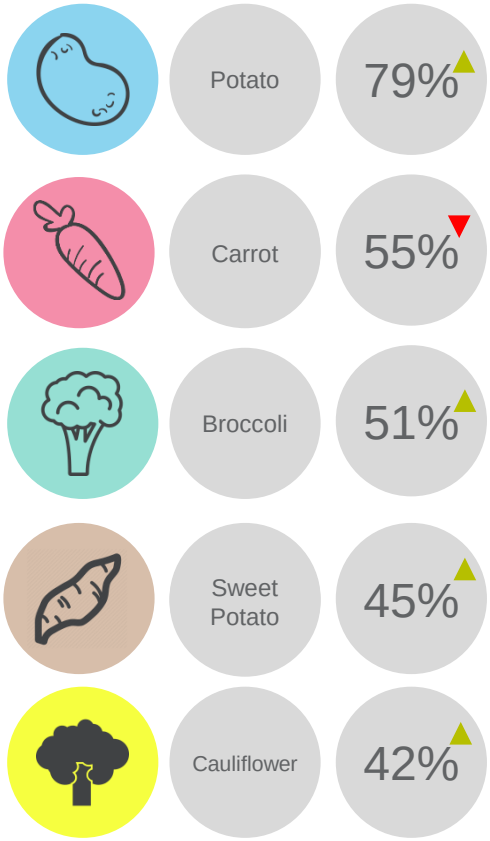
▼: Indicates LOWER score than current wave.
▲: Indicates HIGHER score than current wave.

Consumers prefer to serve pumpkin with potatoes and carrots. Roasting and soups remain the primary cooking styles.

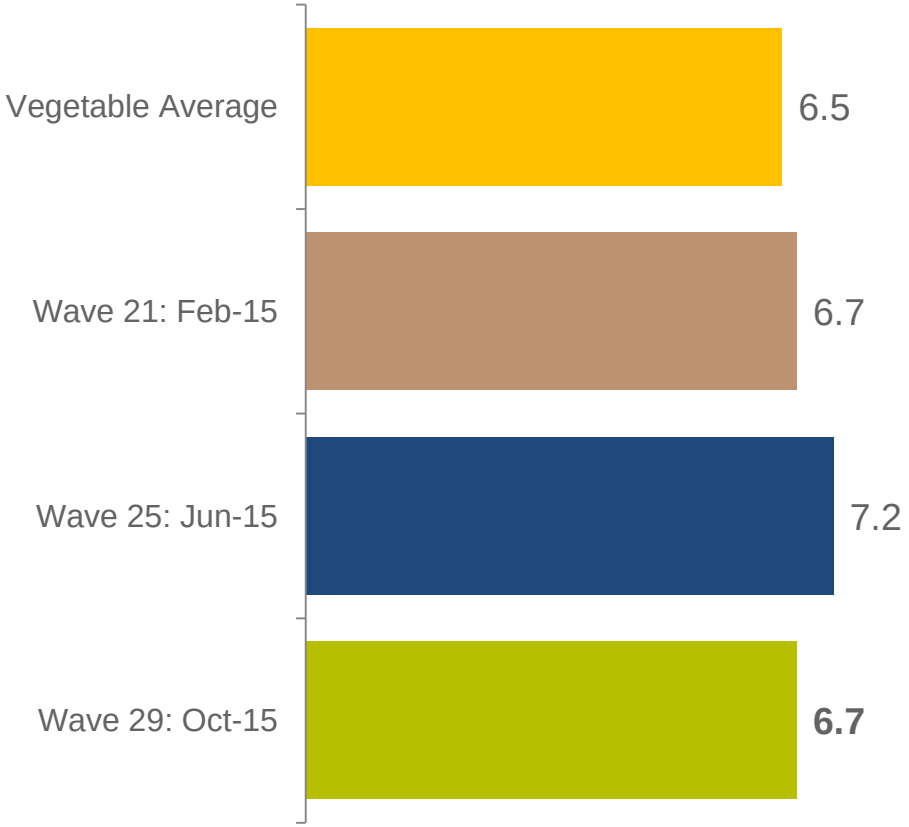
Accompanying Vegetables



Top 10 Cooking Styles			
	Wave 21	Wave 25	Wave 29
Roasting	75%	74%	**75%**
Soup	41%	61%	**55%**
Mashing	46%	49%	**50%**
Baking	43%	50%	**44%**
Steaming	36%	40%	**37%**
Boiling	32%	36%	**36%**
Slow Cooking	17%	21%	**18%**
Microwave	22%	16%	**16%**
Stir frying	11%	9%	**10%**
Grilling	7%	8%	**10%**

Q9. How do you typically cook pumpkin?
Q10a. And when are you serving pumpkin which of the following do you also serve together with this?
Sample Wave 21 N=311, Wave 25 N=304, Wave 29 N=305

Pumpkin provenance has declined and returned to the average seen in February 2015, and sits just above the Vegetable Average.



Q14. When purchasing <commodity>, how important is Provenance to you?
Sample Wave 21 N=311, Wave 25 N=304, Wave 29 N=305

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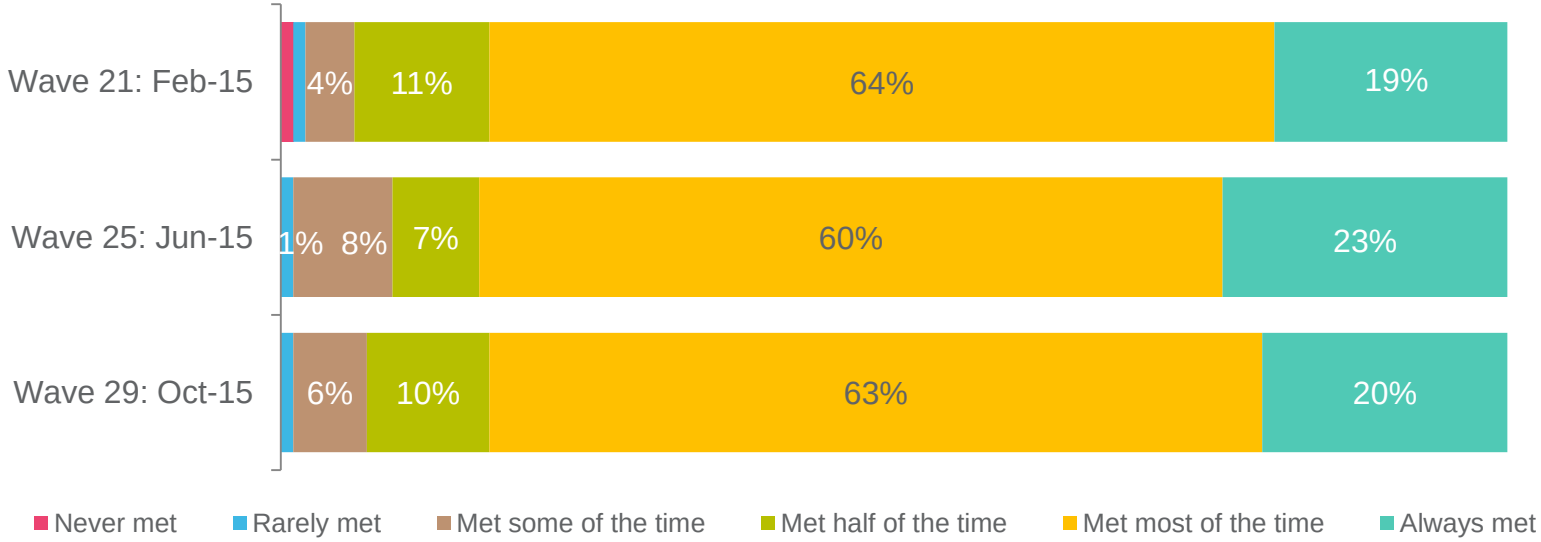
Pumpkins are expected to stay fresh for 11 days once purchased.
Consumer freshness expectations are generally being met, consistent with previous waves.

Expected to stay fresh for **11.5** days

▲ 11.6 days, Wave 21
▲ 12.5 days, Wave 25

Expectations Met



Q12. How long do you expect pumpkin to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy pumpkin?
Sample Wave 21 N=311, Wave 25 N=304, Wave 29 N=305

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

Pumpkin Product Launch Trends.

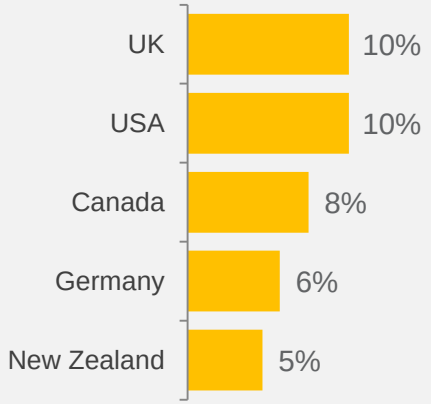
Pumpkin Global NPDs

August – October 2015

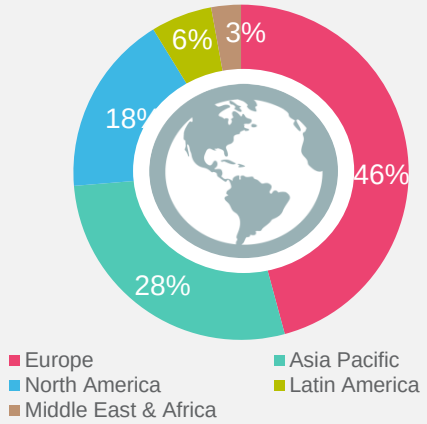
There were 559 products launched in the past three months that contained pumpkin. Europe and Asia Pacific were the main regions for launches, while UK was the key country. Flexible packaging remained the most common format. Launches were predominately in snack and breakfast cereal categories.

559 Global NPDs

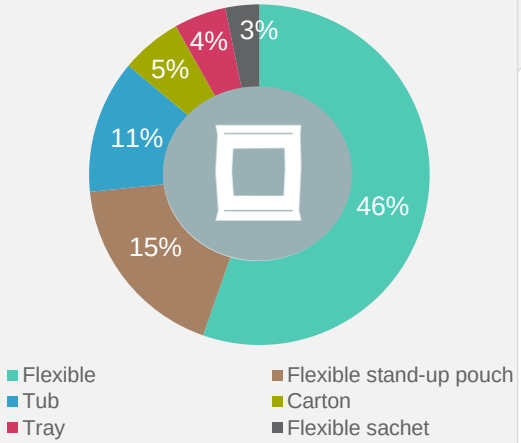
Country



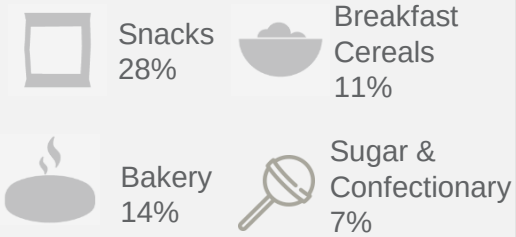
Region



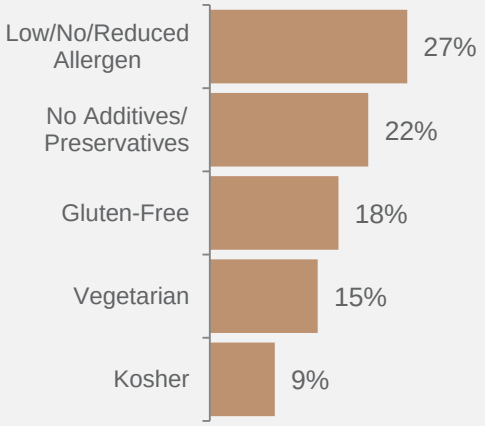
Top Pack Formats



Categories



Top Claims



Pumpkin Product Launches:
Last 3 Months (August – October 2015)
Summary

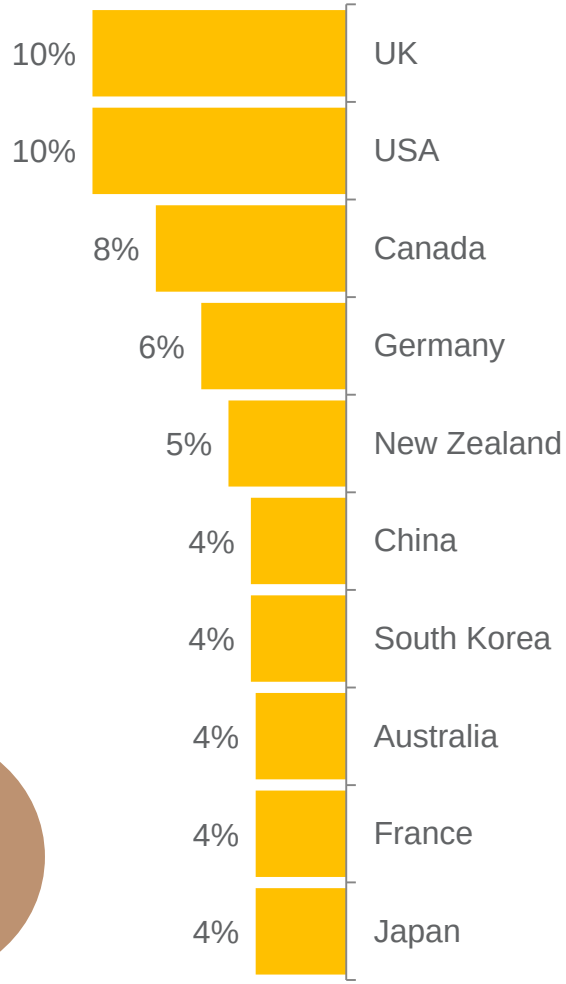
- A total of 559 products containing pumpkin as an ingredient were launched globally in the last 3 months, consistent with the previous quarter.
- There were 20 pumpkin launches in Australia this quarter.
- Europe (46%) and Asia Pacific (28%) were the top regions for launches. Key countries for innovation were UK (10%), USA (10%), and Canada (8%).
- Flexible packaging continues to be the widely used format for launches (46%).
- Top categories for product launches were snacks (28%), breakfast cereals (11%) and bakery goods (11%).
- Core claims for product launches globally were based around health (e.g. low allergen 27%, no additives/preservatives 22%) and gluten-free (18%).
- The most innovative product was a sweetpotato & pumpkin parfait launched in Japan (examples of products can be found at the end of the pumpkin trend report).

Source: Mintel (2015)

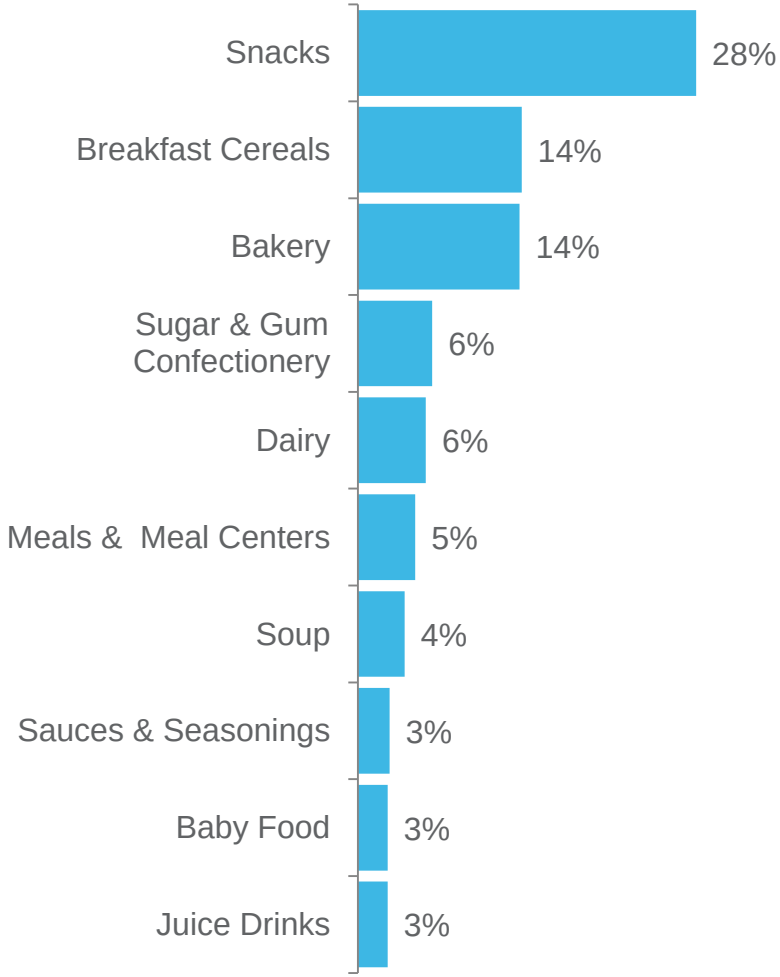
Pumpkin Launches
Country & Categories

- The most active country for launches in the last 3 months was the UK, followed by USA and Canada.
- Snacks remained the key category for launches, with breakfast cereals and bakery also common launches.

Top Launch Countries



Top Launch Categories



559 Launches Globally

Number of Global Pumpkin NPD for the L3M N=559

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Pumpkin Launches

Top Claims & Pack Formats Used

- Pack formats were consistent across regions, with the primary format of choice being flexible packaging.
- Health claims were most commonly used globally, with allergen free and no additives being amongst the most common claims.

Pack Formats Used

Global	Flexible	46%
	Flexible stand-up pouch	15%
	Tub	11%
Europe	Flexible	50%
	Tub	15%
	Flexible stand-up pouch	7%
Asia Pacific	Flexible	44%
	Flexible stand-up pouch	13%
	Flexible sachet	10%

Top Claims Used

Global	Low/No/Reduced Allergen	27%
	No Additives/Preservatives	22%
	Gluten-Free	18%
Europe	No Additives/Preservatives	23%
	Low/No/Reduced Allergen	22%
	Vegetarian	19%
Asia Pacific	No Additives/Preservatives	40%
	Social Media	19%
	Vegetarian	19%

Number of Global Pumpkin NPD for the L3M N=559
Only regions with n >30 are displayed

Innovative Pumpkin Launches:
L3M (August – October 2015)

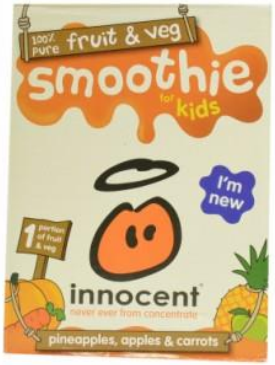
Mamma Emma Fresh Potato Gnocchi with Pumpkin (Italy)

Mamma Emma Gnocchi di Patate Fresche con Zucca (Fresh Potato Gnocchi with Pumpkin) are now available. They are prepared with steamed fresh potatoes, are passed one by one on the grater, and do not contain preservatives. The product retails in a 400g recyclable pack serving two portions. The manufacturer states to use 100% clean energy.

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

Innocent Smoothie for Kids Pineapples, Apples & Carrots Smoothie (UK)

Innocent Smoothie for Kids Pineapples, Apples & Carrots Smoothie contains 100% pure fruit and vegetable and no concentrate, added sugar or preservatives. This product provides one portion of fruit and veg, and is designed to make kids eat vegetables. It is ideal for lunch boxes, and retails in a recyclable pack of 4 x 180ml recyclable cartons, featuring the Rainforest Alliance Certified and FSC Mix Board logos.



Claims:
No Additives/Preservatives, Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Low/No/Reduced Sugar, Ethical - Human, Ethical - Charity, Children (5-12), On-the-Go

The Giving Tree Pumpkin Crisps (Finland)

The Giving Tree Pumpkin Crisps are vacuum fried and said to have all the nutrition of fresh pumpkin. This product provides one of the five daily fruit and vegetable portions, and is described as tasty, healthy and nice. It retails in an 30g pack.

Claims:
N/A

Bourbon Choco & Pumpkin Biscuits (Japan)

Bourbon Choco & Pumpkin Biscuits have been relaunched for Halloween 2015. The product comprises chocolate biscuits and pumpkin biscuits and retails in a 230g pack. Launched on September 1st 2015 with an RRP of 432 yen.

Claims:
Seasonal

Source: Mintel (2015)

Innovative Pumpkin Launches:
L3M (August – October 2015)

Archer Farms Pumpkin Spice Granola (USA)

Archer Farms Pumpkin Spice Granola is a limited edition product which is said to be perfect for a snack on the go, adding to a trail mix or dried fruits, and also as a topping layered with any combination of fruit and yogurt, or a topping for muffins and quick breads. It contains 24g whole grain and 8g of fat per serving, and is a good source of fiber. This kosher product retails in a reclosable 12-oz. pack.
.

Claims:
High/Added Fiber, Kosher, On-the-Go, Convenient Packaging, Wholegrain, Limited Edition

Sweets+ Pumpkin Poundcake (Japan)

Sweets+ Pumpkin Poundcake has been repackaged. The product is a moist cake with marble design and retails in a 53g pack. Launched on September 8, 2015 with an RRP of 108 yen.

Claims:
N/A

Domremy Gochisou Autumn Desserts Sweet Potato & Pumpkin Parfait (Japan)

Domremy Gochisou Autumn Desserts Sweet Potato & Pumpkin Parfait features caramel pudding, chestnut mousse, pumpkin cream and homemade sweet potato. Launched on September 1, 2015. RRP unavailable.

Claims:
Seasonal

Wu-Mu Pumpkin Noodles (Taiwan)

The cereal contains DHA, omega-3 and 6 as essential fatty acids; and features five nutrition sources, nine essential amino acids, 12 vitamins and 10 minerals said to support optimum growth in kids. It also contains iron claimed to prevent and overcome iron deficiency anaemia; and calcium that plays role a in bone formation and maintains bone and teeth density.

Claims:
No Additives/Preservatives

Source: Mintel (2015)

Innovative Pumpkin Launches:
L3M (August – October 2015)

Shine Organics Calm Banana, Pumpkin, Coconut, Blackberry, Vanilla, Passion Flower & Chia (USA)

Shine Organics Calm Banana, Pumpkin, Coconut, Blackberry, Vanilla, Passion Flower & Chia is described as the smartest on-the-go organic snack that contains a blend of organic fruits, veggies and micronutrients. The soothing properties of passion flower and blackberry combined with organic fruits, veggies and chia seed are said to help relax mind, body and spirit.

Claims:
No Additives/Preservatives, GMO-Free, Kosher, Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Ethical - Human, Ease of Use, Organic, High/Added Fiber, On-the-Go

AM Ana Monteiro Pumpkin Soup (Brazil)

AM Ana Monteiro Sopa de Abóbora (Pumpkin Soup) is now available. This microwaveable soup contains no gluten, milk or milk derivatives, preservatives or chemical additives. It retails in a 100ml pack featuring the manufacturer's Facebook link.

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

Munchy Seeds Honey Roasted Sunflower & Pumpkin Seeds (UK)

Munchy Seeds Honey Roasted Sunflower & Pumpkin Seeds are a source of protein, high in vitamin E which contributes to the protection of cells from oxidative stress, zinc, phosphorus, iron and fibre, and free of gluten and wheat. It is suitable for coeliacs and vegetarians, and retails in a 25g pack featuring the Facebook and Twitter logos.

Claims:
Low/No/Reduced Allergen, High/Added Fiber, Gluten-Free, Social Media, Vegetarian, Antioxidant

Lifefood Crawnchies Organic Raw Pumpkin Chips with Curcuma (Netherlands)

Lifefood Crawnchies Organic Raw Pumpkin Chips with Curcuma are handmade, suitable for vegans and free from gluten and added salt. The 100% raw stackable chips retail in a 30g pack featuring the EU Green Leaf logo.

Claims:
Low/No/Reduced Allergen, Gluten-Free, Vegan, Low/No/Reduced Sodium, Organic, No Animal Ingredients

Source: Mintel (2015)

Top Australian Pumpkin Launches:
L3M (August – October 2015)

McKenzie's From the Kitchen Country Pumpkin & Lentil Soup

Nature First Organic Organic Pumpkin Kernels

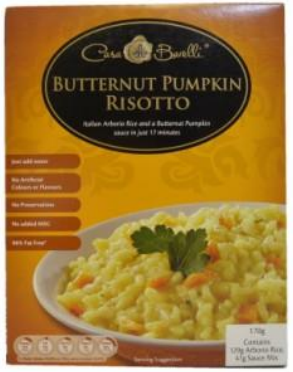
On The Menu Roast Range Roast Beef

Wattle Valley Chunky Dips Roasted Pumpkin Dip with Cashew & Parmesan

Woolworths Created with Jamie Jamie's Favourite Chicken Curry Meal Kit

McCain Pumpkin

Casa Barelli Butternut Pumpkin Risotto



Heinz Nutrios Pumpkin Flavour Puffed Wholegrain Snacks

Source: Mintel (2015)

Baby Broccoli.

There were no products launched containing baby broccoli as an ingredient in the past three months.

Both purchase and consumption have slightly declined this wave.

Baby Broccoli is typically purchased from Woolworths and Coles.

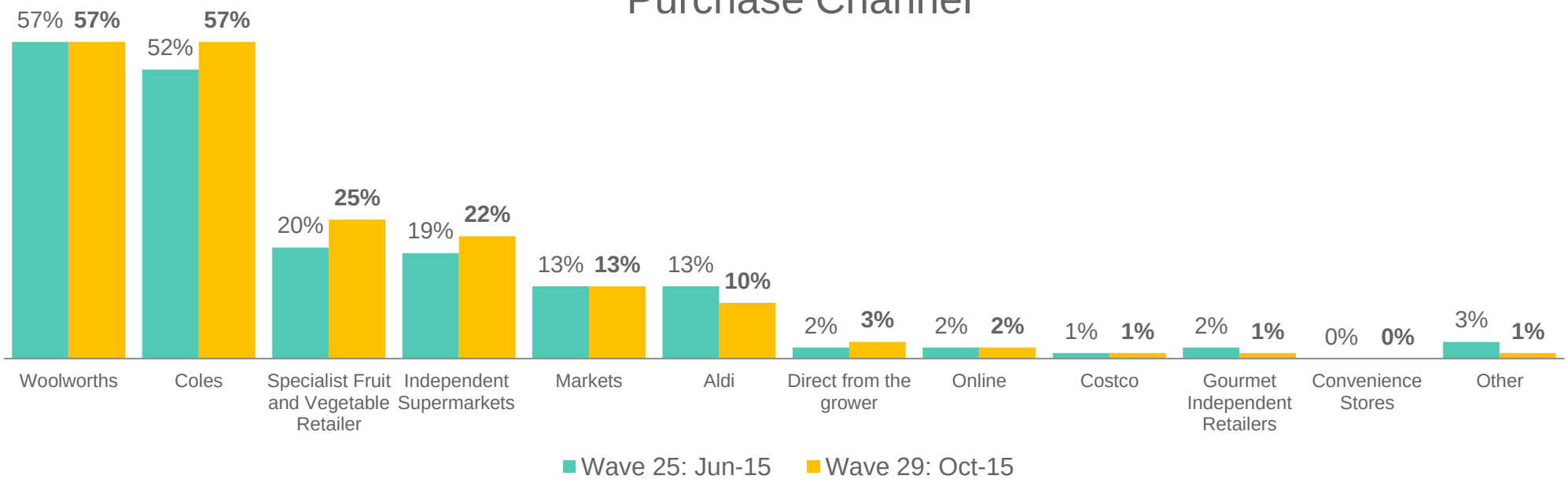
Average Purchase **3.4** times per month

▲ 3.9 times, Wave 25

Average Consumption **6.8** times per month

▲ 7.2 times, Wave 25

Purchase Channel



Q1. On average, how often do you purchase <commodity>?
Q2. On average, how often do you consume <commodity>?
Q5. From which of the following channels do you typically purchase <commodity>?
Sample Wave 25 N=205, Wave 29 N=202

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Average Spend and Price Sensitivity

Average weight of purchase

The average consumer typically purchases **0.5kg** of Baby Broccoli, lower than the previous wave.

▲ 0.6kg, Wave 25

Recalled last spend

The average recalled last spend is **$3.60** in October 2015, consistent with the previous month.

— $3.60, Wave 25

Value for money

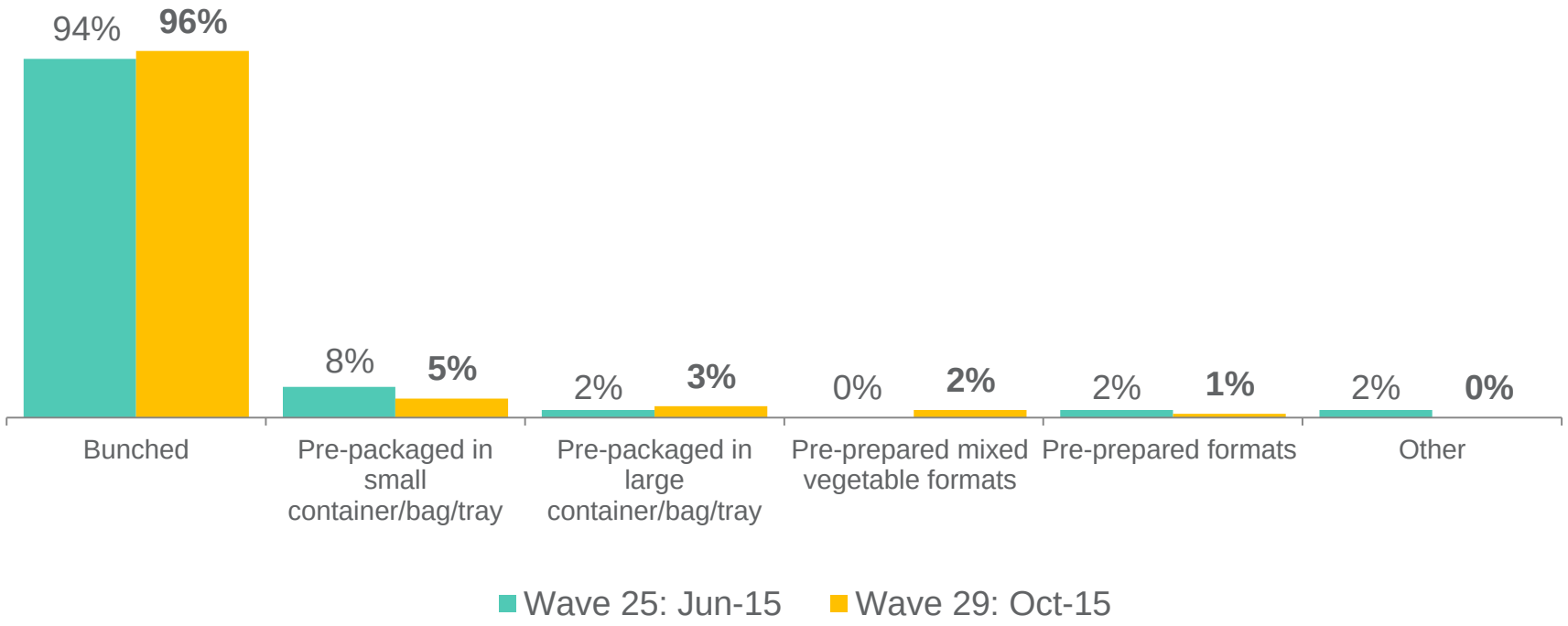
On average, consumers perceive Baby Broccoli to be moderate value for money **(6.1/10).**

▼ 6.0/10, Wave 25

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 typical purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 25 N=205, Wave 29 N=202

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

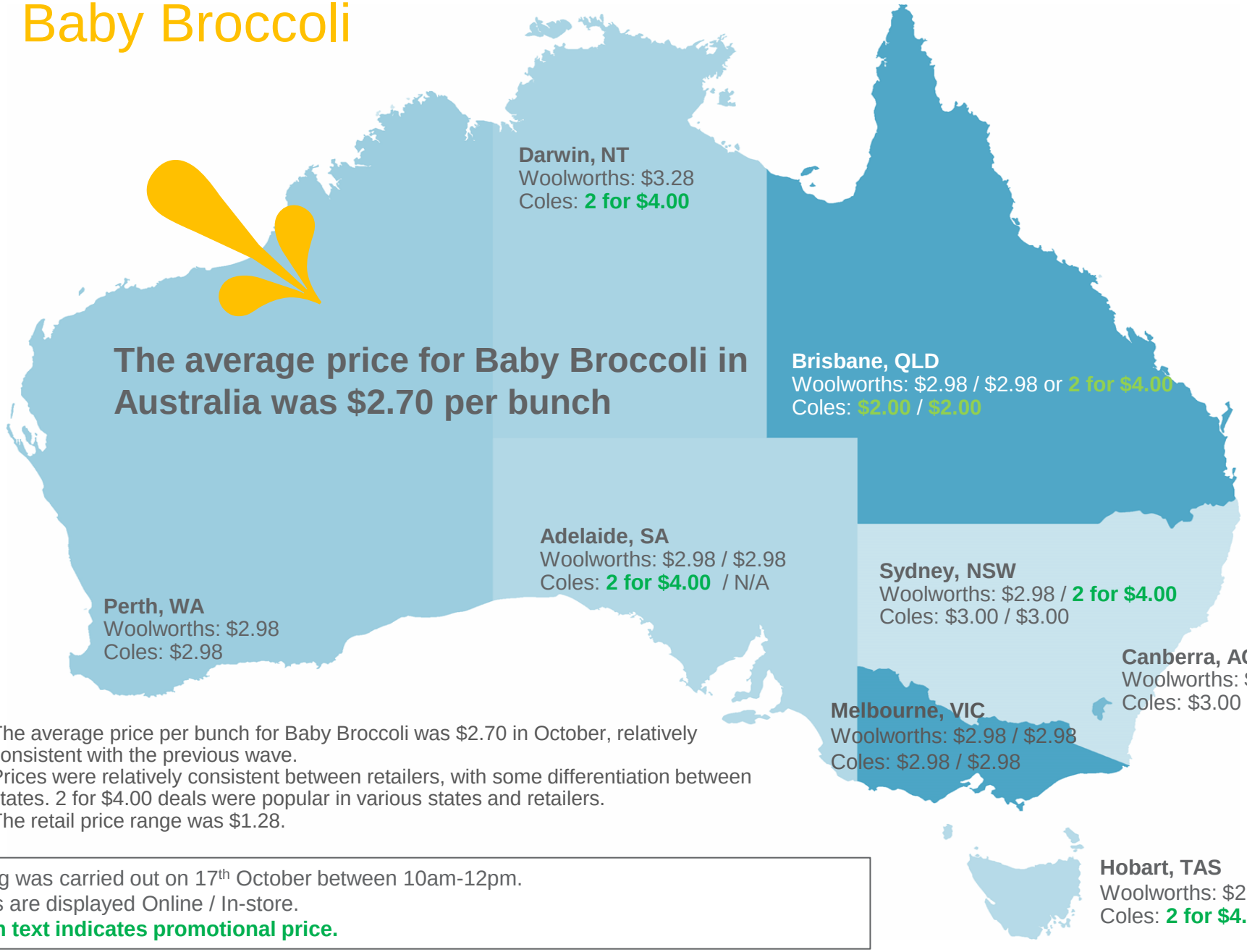
Bunched Baby Broccoli is the dominant format purchased by consumers, consistent with the previous wave.



Q4b. In what fresh formats do you typically purchase <commodity>?
Sample Wave 25 N=205, Wave 29 N=202

Online and In-store Commodity Prices

Baby Broccoli



The average price for Baby Broccoli in Australia was $2.70 per bunch

- The average price per bunch for Baby Broccoli was $2.70 in October, relatively consistent with the previous wave.
- Prices were relatively consistent between retailers, with some differentiation between states. 2 for $4.00 deals were popular in various states and retailers.
- The retail price range was $1.28.

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

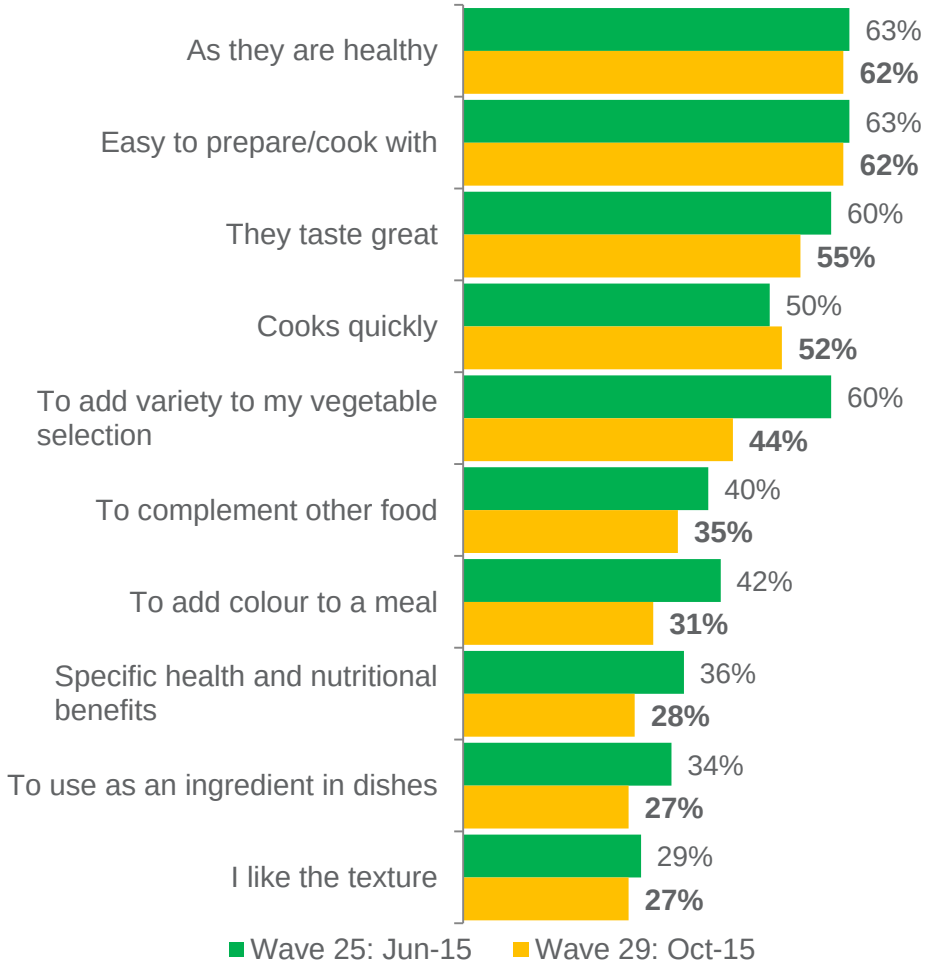
Spontaneous Awareness

86% of consumers were unaware of any varieties of baby broccoli, which is consistent with the past wave.

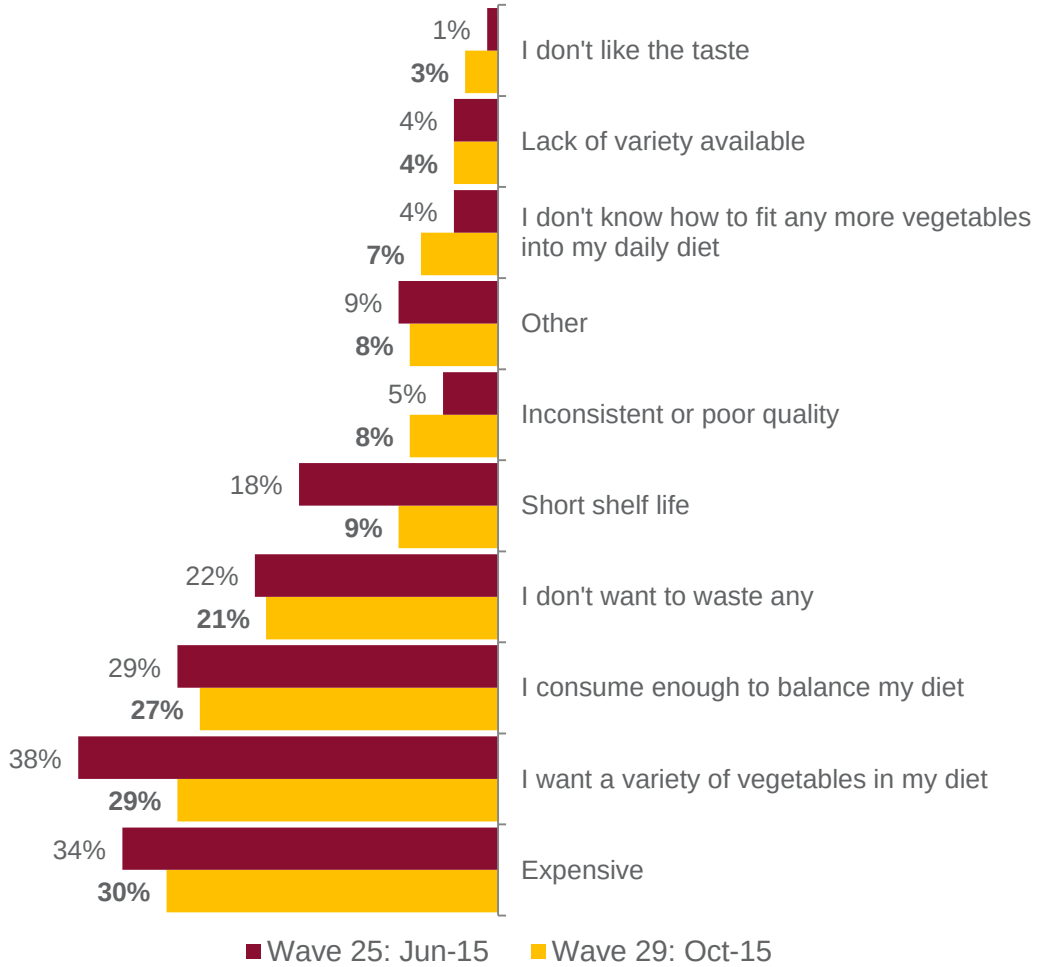
Q6a. What varieties/types of <commodity> are you aware of? (unprompted)
Sample Wave 25 N=205, Wave 29 N=202

Health and the ease of preparation remain the key drivers for Baby Broccoli purchase. Expense and wanting a variety of vegetables are the key barriers. Positively, this wave saw a substantial decrease in short shelf life as a 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 25 N=205, Wave 29 N=202

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Australian and Chinese cuisines are the most popular ways of cooking baby broccoli dishes, consistent with the previous wave.

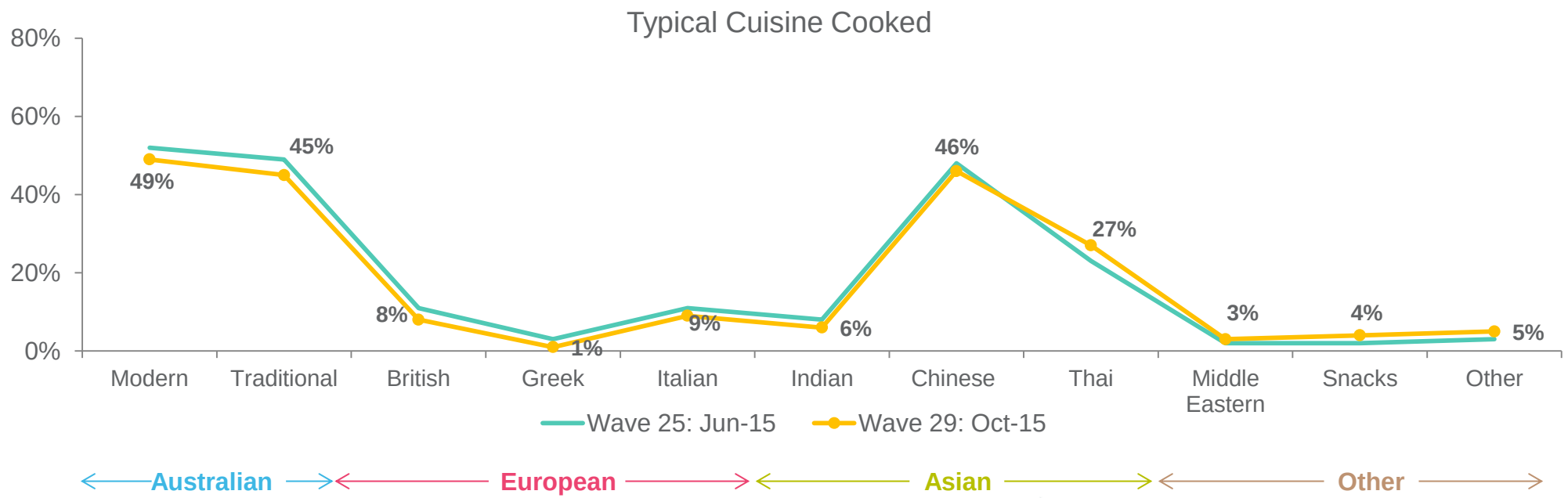
Key meal occasions are primarily centred around dinner and family meals.

Top 5 Consumption Occasions

	Wave 25	Wave 29
Dinner	71%	**70%**
Family Meals	62%	**55%**
Weekday Meals	43%	**40%**
Quick Meals	37%	**39%**
Weekend Meals	34%	**29%**

12% used Baby Broccoli when cooking a new recipe

▼ 11%, Wave 25



Q10. What cuisines do you cook/consume that use <commodity>?
Q11. Which of the following occasions do you typically consume/use <commodity>?
Sample Wave 25 N=205, Wave 29 N=202

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

Consumers continue to serve baby broccoli with carrots and potatoes. Steaming and stir frying remain the primary cooking styles. This wave also sees an increase in popularity of boiling and consuming baby broccoli raw.

Accompanying Vegetables

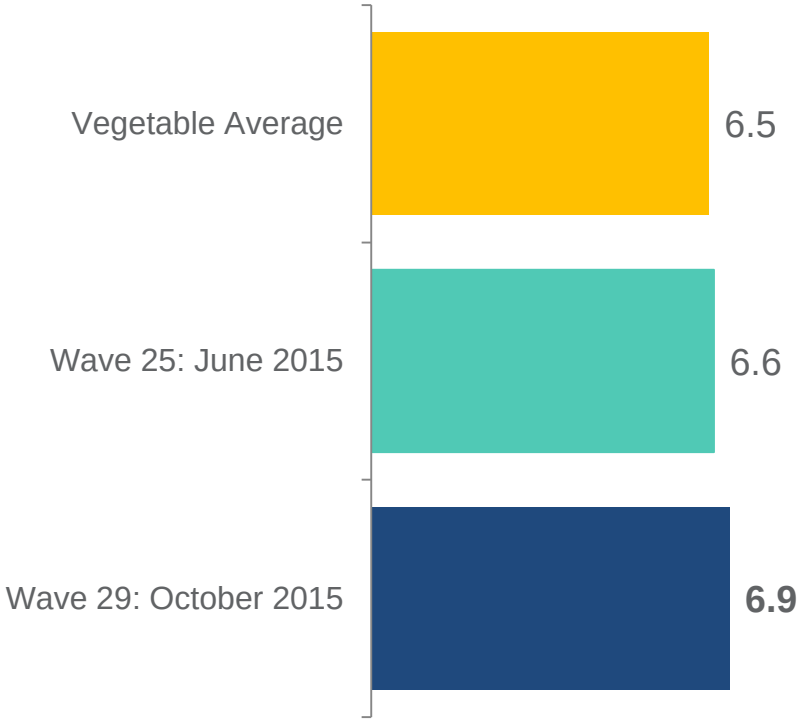
Carrot	56% ▼
Potatoes	48% ▼
Sweet Potato	31% ▲
Beans	27% ▲
Cauliflower	25% ▼

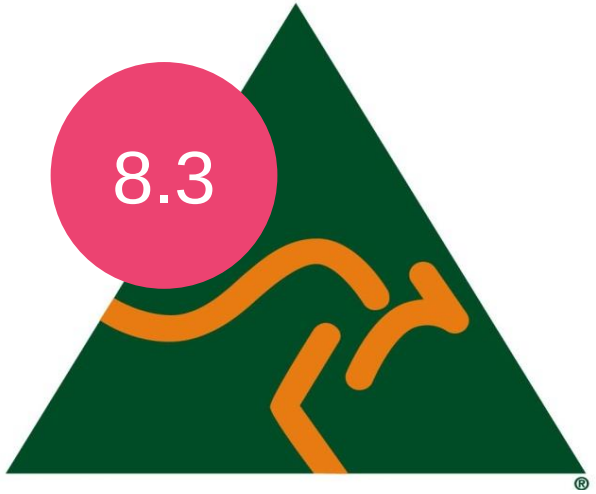
Top Cooking Styles

	Wave 25	Wave 29
Steaming	64%	**62%**
Stir frying	47%	**47%**
Boiling	24%	**31%**
Microwave	24%	**21%**
Sautéing	14%	**10%**
Raw	3%	**9%**
Frying	7%	**6%**
Roasting	3%	**4%**
Slow Cooking	8%	**4%**
Soup	8%	**4%**

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?
Sample Wave 25 N=205, Wave 29 N=202

General provenance is important to consumers. However, they are more interested in knowing that baby broccoli is grown in Australia, which has further increased from the previous wave.





Q14. When purchasing Broccolini/Baby Broccoli, how important is Provenance to you? (that is, knowing where the product is grown/where it comes from)
Q15. And when purchasing Broccolini/Baby Broccoli, how important is that it is grown in Australia?
Mean scores out of 10.
Sample Wave 25 N=205, Wave 29 N=202

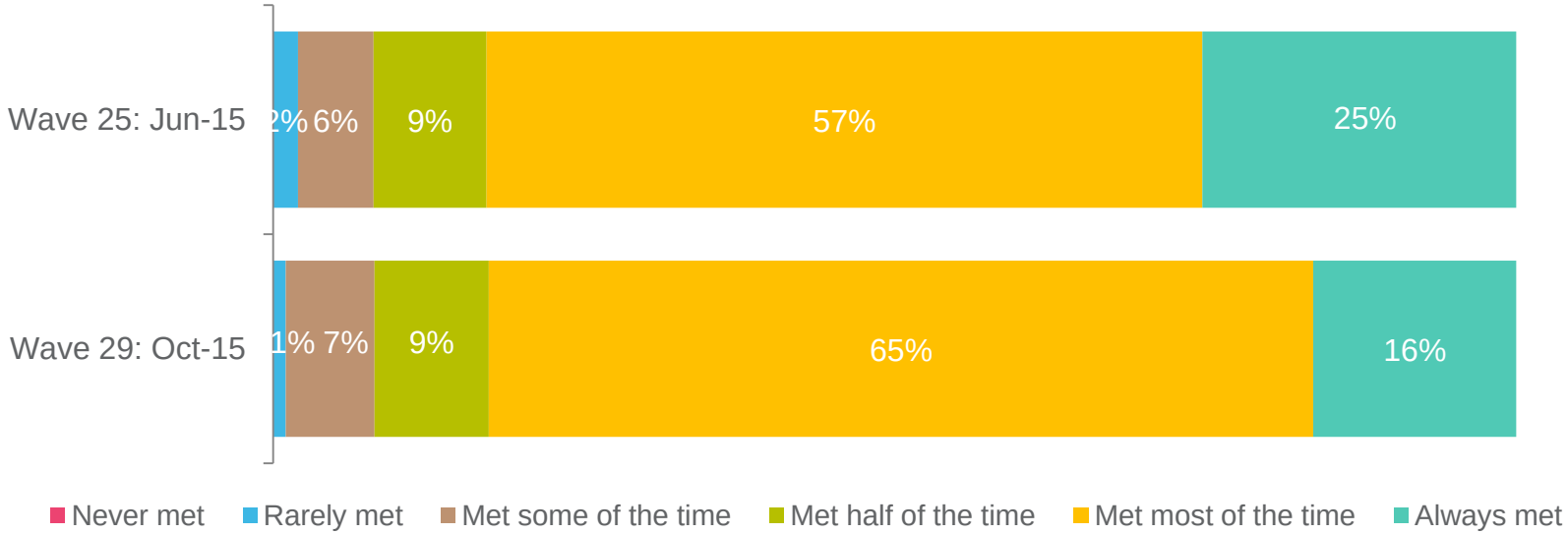
Consumers expect baby broccoli to remain fresh for around six days once purchased, consistent with the previous wave.

There has been a decline in freshness expectations of baby broccoli always being met.

Expected to stay fresh for **6.3** days

6.3 days, Wave 25

Expectations Met



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> ?
Sample Wave 25 N=205, Wave 29 N=202

Horticulture Innovation Australia

colmar brunton

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

Silverbeet.

Average purchase and consumption of silverbeet have declined this wave by one occasion per month.

Silverbeet is generally purchased from mainstream and specialist retailers.

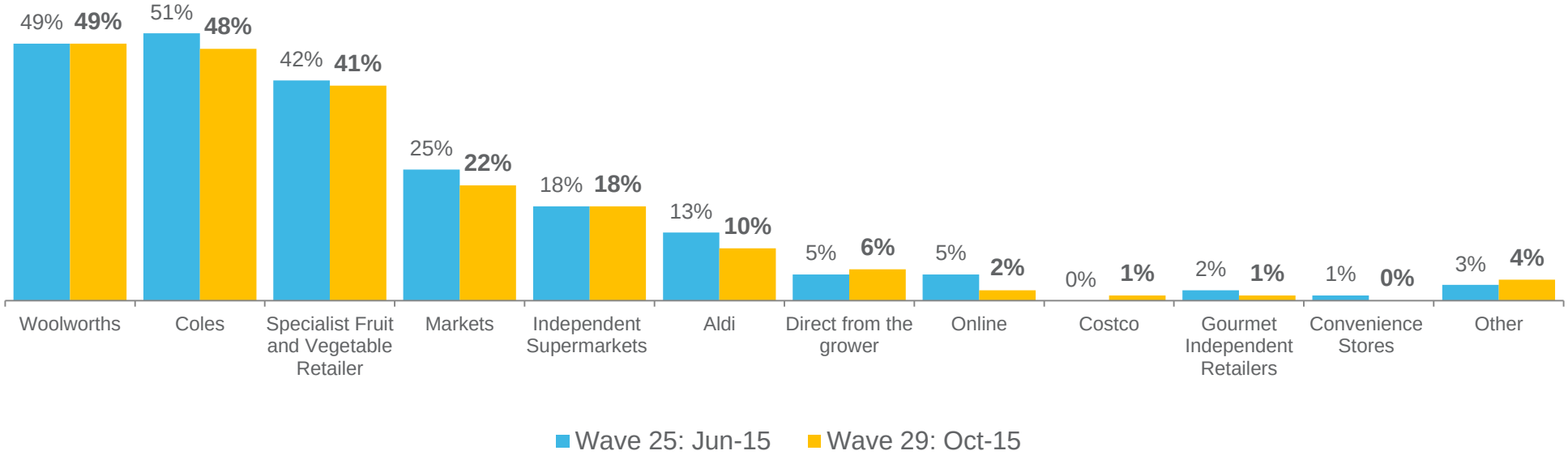
Average Purchase **3.1** times per month

▲ 3.9 times, Wave 25

Average Consumption **6.8** times per month

▲ 8.1 times, Wave 25

Purchase Channels



Q1. On average, how often do you purchase silverbeet?
Q2. On average, how often do you consume silverbeet?
Q5. From which of the following channels do you typically purchase silverbeet?
Sample Wave 25 N=203, Wave 29 N=204

Horticulture Innovation Australia

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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 purchases **0.8kg** of silverbeet, an increase from the previous wave.

▼ 0.7kg, Wave 25

Recalled last spend

Recalled last spend on silverbeet is **$3.40**, relatively consistent with the previous wave.

▼ $3.30, Wave 25

Value for money

Consumers' perceived value for money is relatively good **(6.5/10)**, albeit lower than in June 2015.

▲ 6.9/10, Wave 25

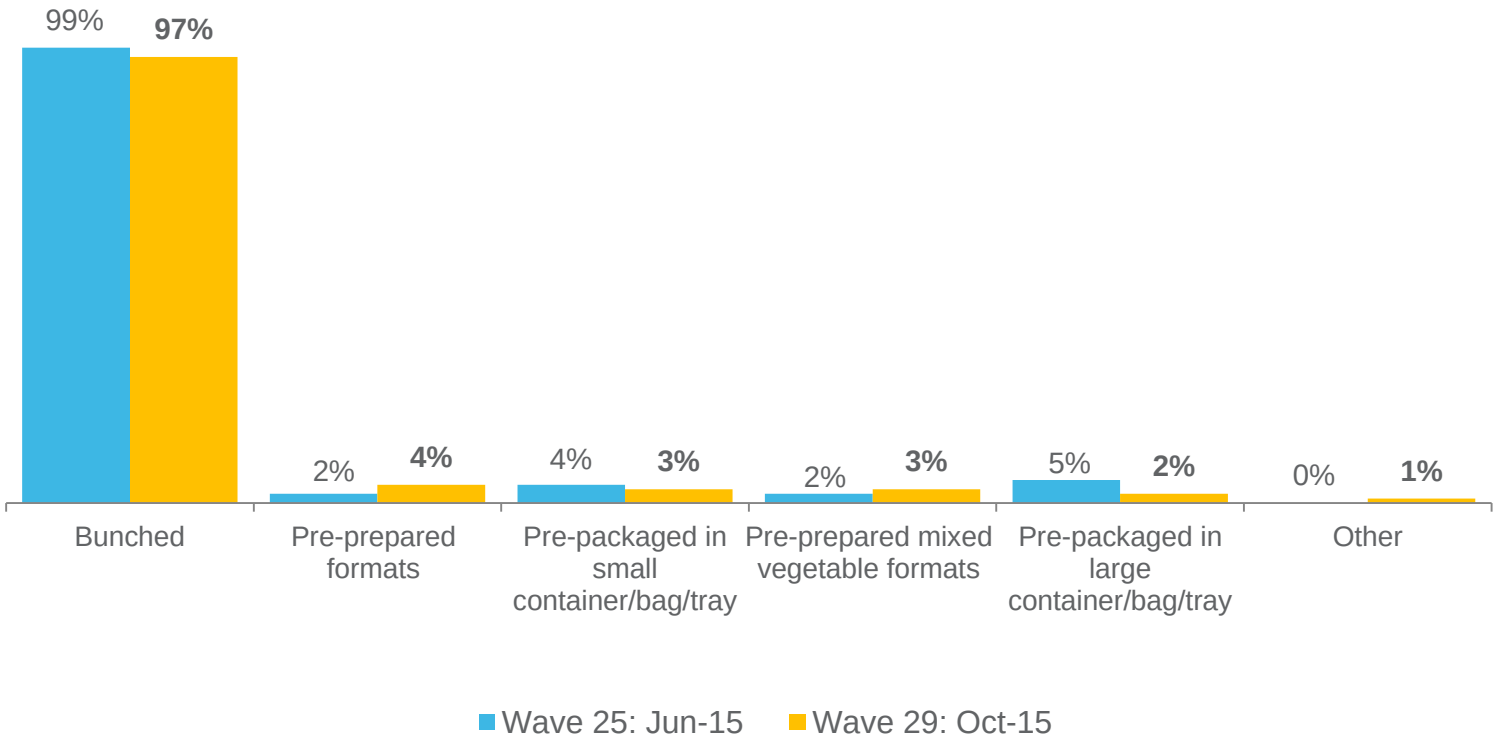
Q3. How much silverbeet do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 25 N=203, Wave 29 N=204

Horticulture Innovation Australia

colmar brunton.

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

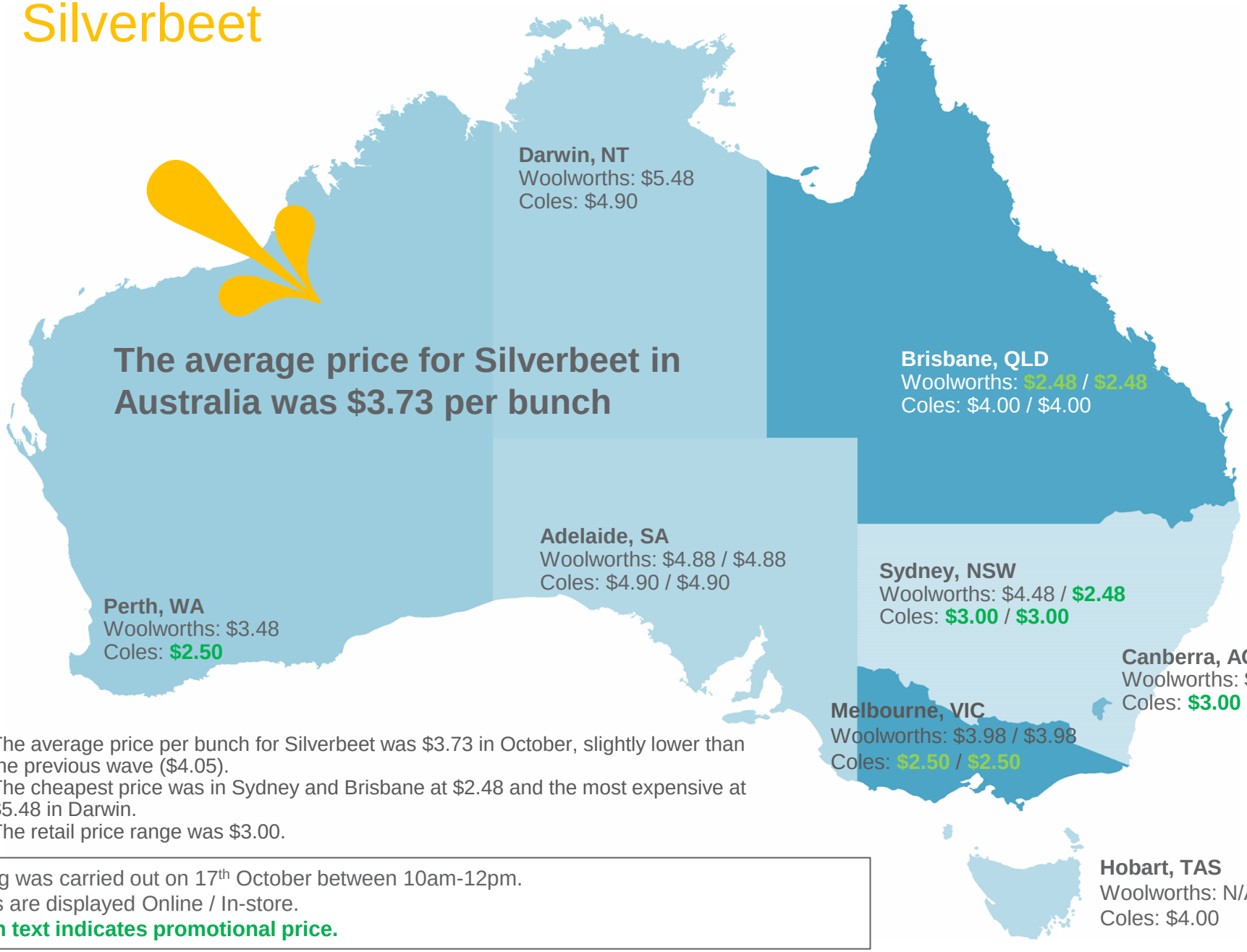
Nearly all consumers purchase silverbeet in bunched formats, consistent with the previous wave. This highlights the limited availability in other formats, including pre-packaged, which is currently purchased by a small number of consumers.



Q4b. In what fresh formats do you typically purchase Silverbeet?
Sample Wave 25 N=203, Wave 29 N=204

Online and In-store Commodity Prices

Silverbeet



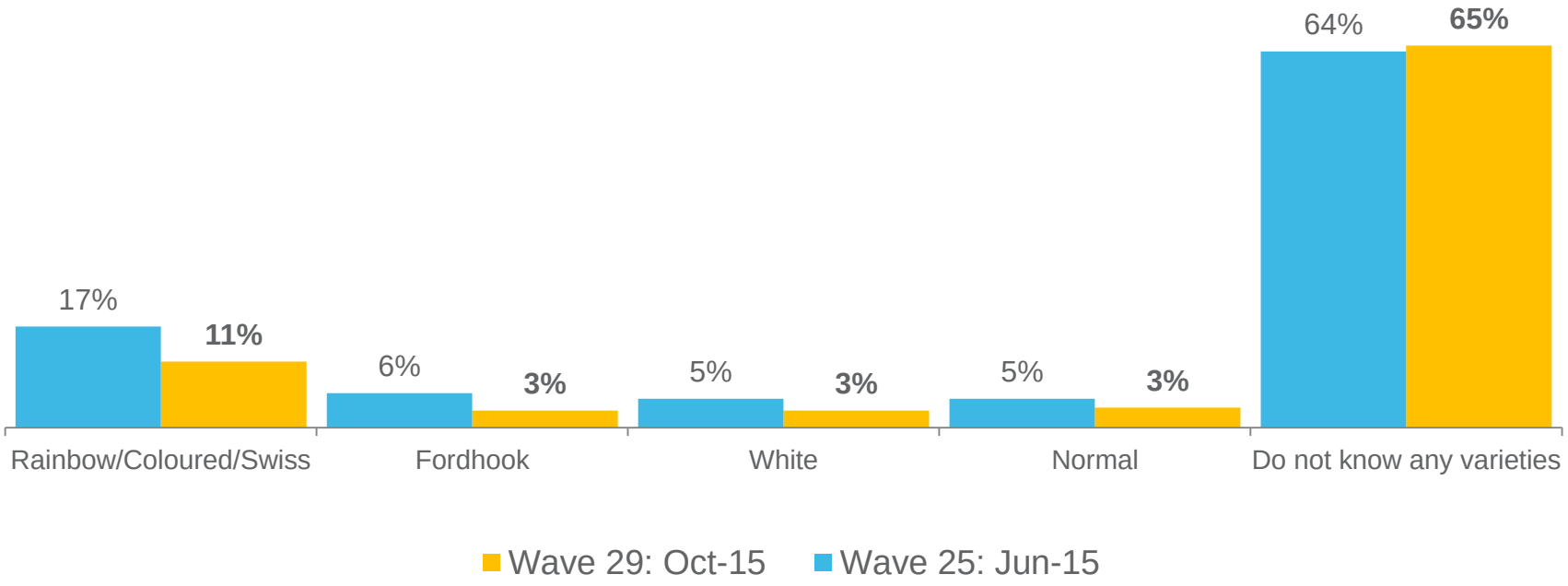
The average price for Silverbeet in Australia was $3.73 per bunch

- The average price per bunch for Silverbeet was $3.73 in October, slightly lower than the previous wave ($4.05).
- The cheapest price was in Sydney and Brisbane at $2.48 and the most expensive at $5.48 in Darwin.
- The retail price range was $3.00.

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

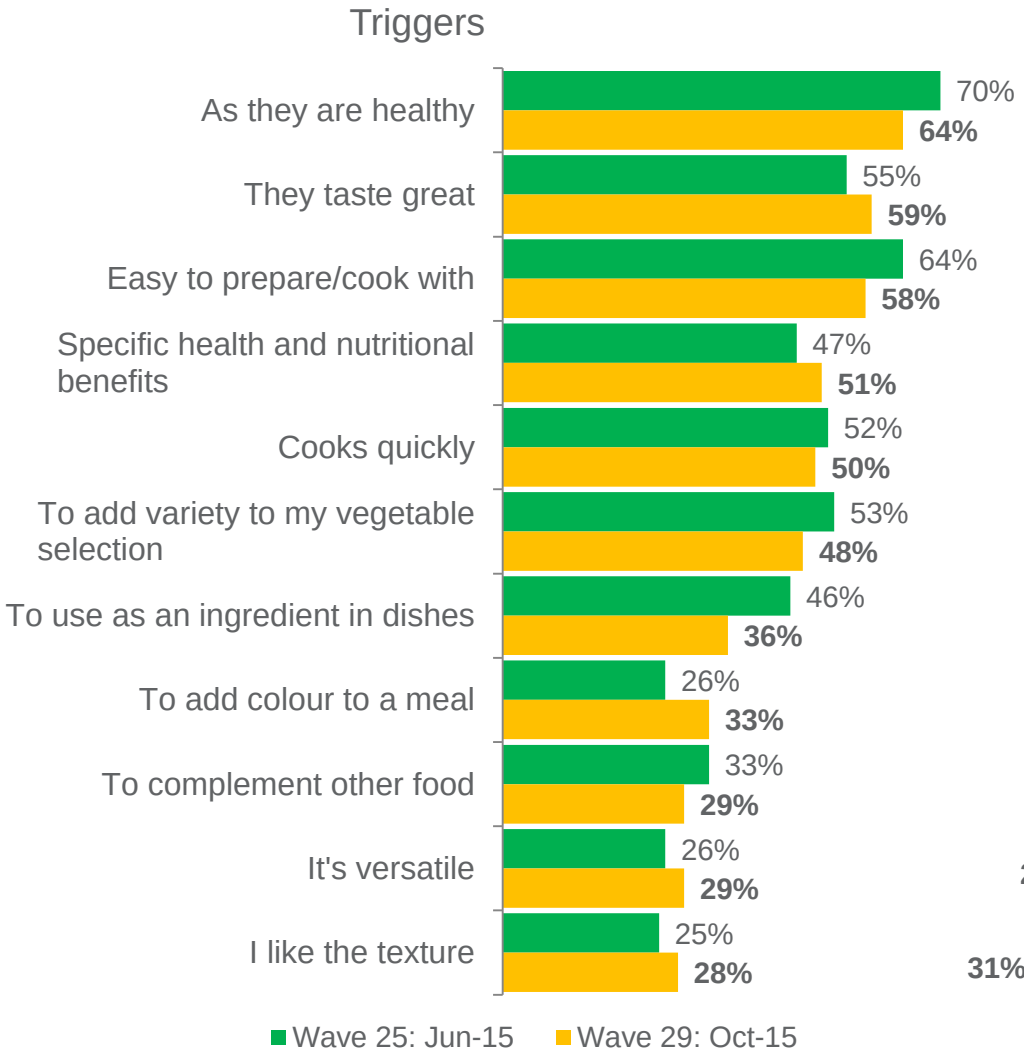
Spontaneous awareness for silverbeet is low, with the highest recall for rainbow/coloured/Swiss silverbeet.

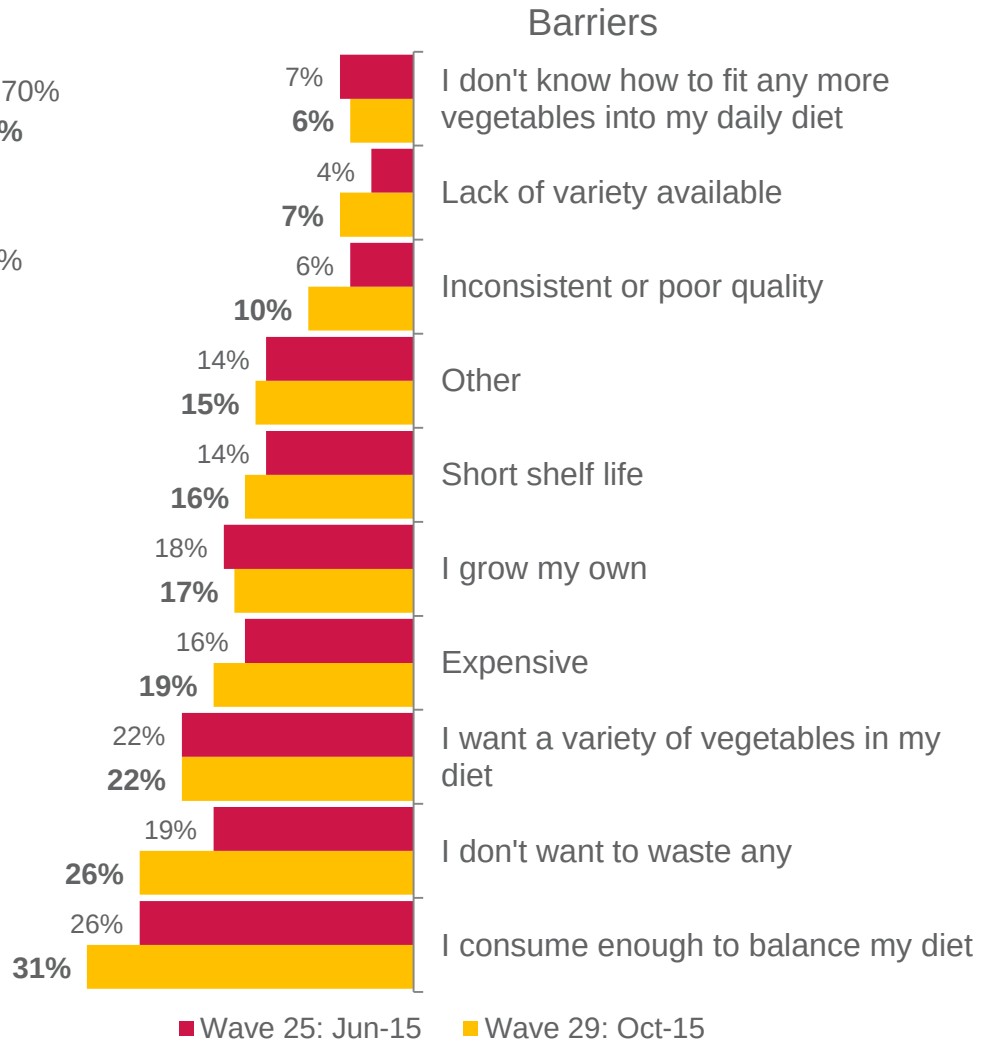
Spinach and Chard were also recalled by consumers as types of silverbeet.



Q6a. What varieties of Silverbeet are you aware of? (unprompted)
Sample Wave 25 N=203, Wave 29 N=204

The key drivers of purchase for silverbeet are health, taste and ease of preparation. In contrast, already consuming enough for their needs and not wanting to waste any are the main barriers to purchase.





Q7. Which of the following reasons best describes why you purchase Silverbeet ?
Q8. Which reason best describes why you don't buy Silverbeet more often?
Sample Wave 25 N=203, Wave 29 N=204

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This wave sees an increase in silverbeet being cooked in Modern Australian, British and Italian cuisines.

Meal occasions tend to occur during dinner and family meals, consistent with the previous wave.

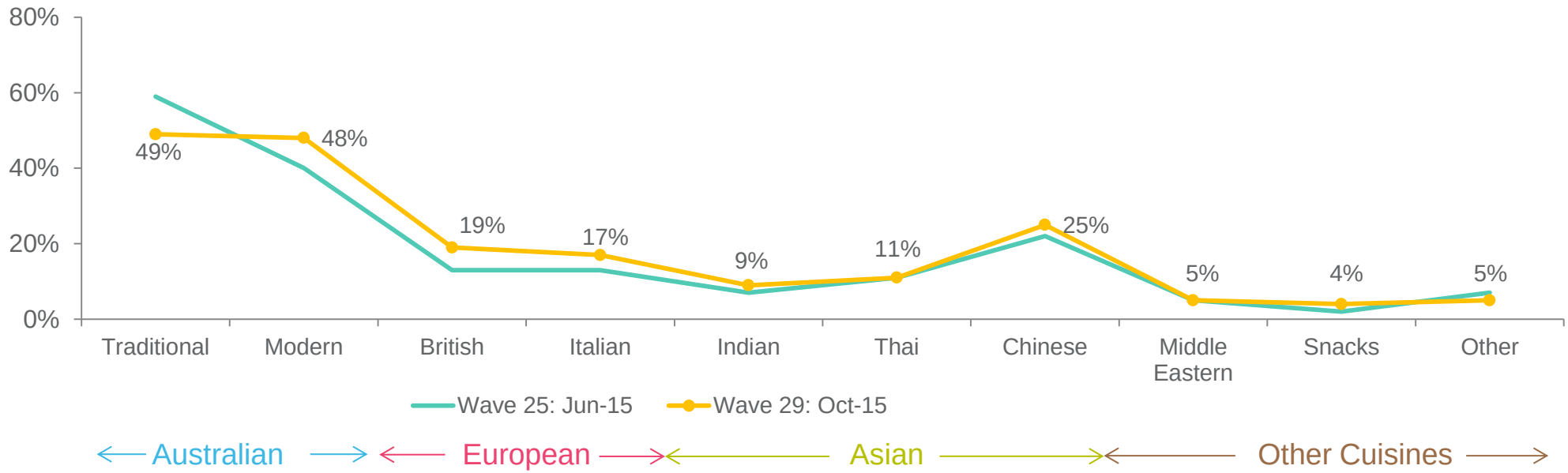
Top 5 Consumption Occasions

	Wave 25	Wave 29
Dinner	67%	**69%**
Family meals	58%	**58%**
Weekday meals	47%	**45%**
Weekend meals	39%	**33%**
Quick meals	34%	**31%**

12% used silverbeet when cooking a new recipe

▲ 15%, Wave 25

Typical Cuisine Cooked



Q10. What cuisines do you cook/consume that use Silverbeet?
Q11. Which of the following occasions do you typically consume/use Silverbeet?
Sample Wave 25 N=203, Wave 29 N=204

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

Consumers prefer to eat silverbeet mainly with potatoes and carrots, consistent with the last wave. Silverbeet is generally steamed, boiled or cooked in stir- fries. This wave sees a relatively large decline in soups as a cooking style.

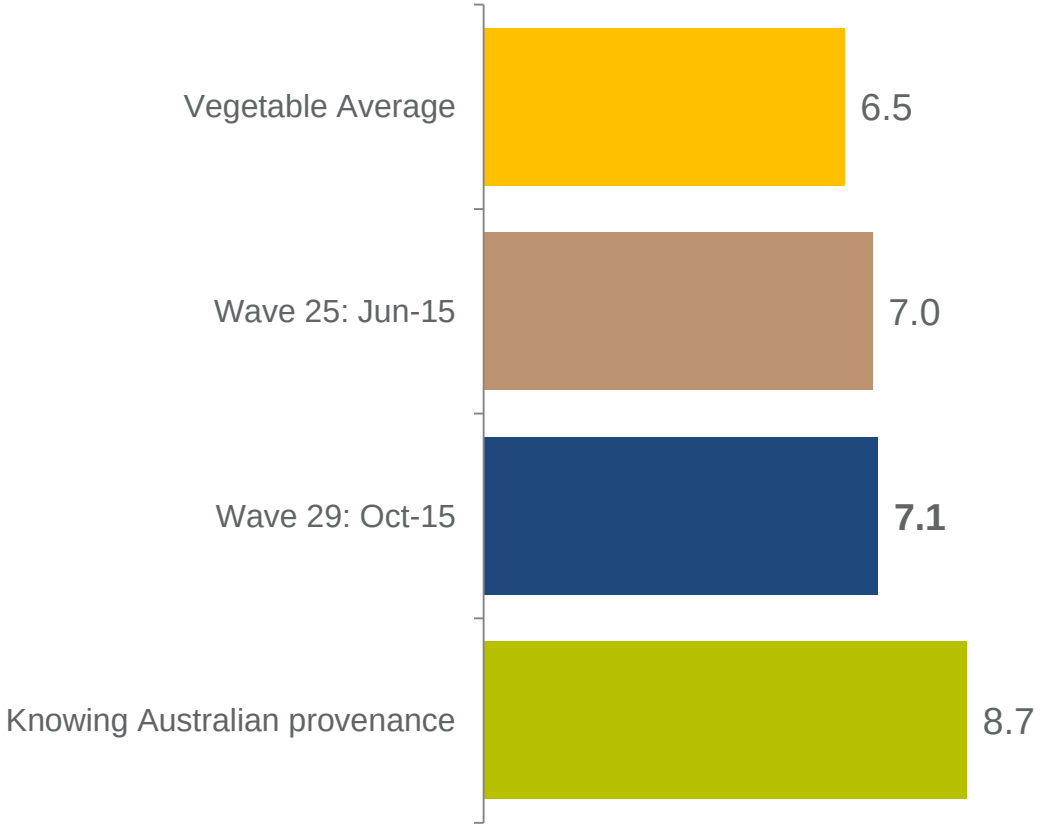
Accompanying Vegetables

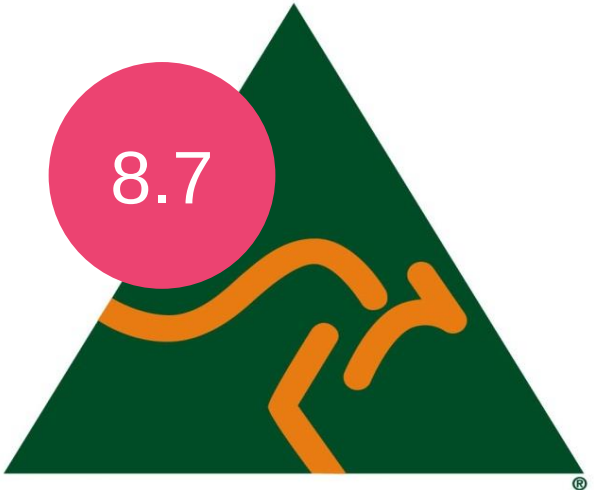
Potato	54% ▼
Carrot	52% ▼
Onion	34% –
Pumpkin	27% ▼
Broccoli	29% –

Top 10 Cooking Styles		
	Wave 25	Wave 29
Steaming	60%	**54%**
Boiling	39%	**39%**
Stir frying	34%	**38%**
Sautéing	21%	**26%**
Soup	24%	**16%**
Microwave	11%	**13%**
Frying	9%	**10%**
Raw	6%	**9%**
Slow Cooking	10%	**7%**
Baking	8%	**5%**

Q9. How do you typically cook Silverbeet?
Q10a. And when are you serving Silverbeet which of the following do you also serve together with this?
Sample Wave 25 N=203, Wave 29 N=204

Knowing that silverbeet is grown in Australia is most important to consumers, continuing to increase from the previous wave.





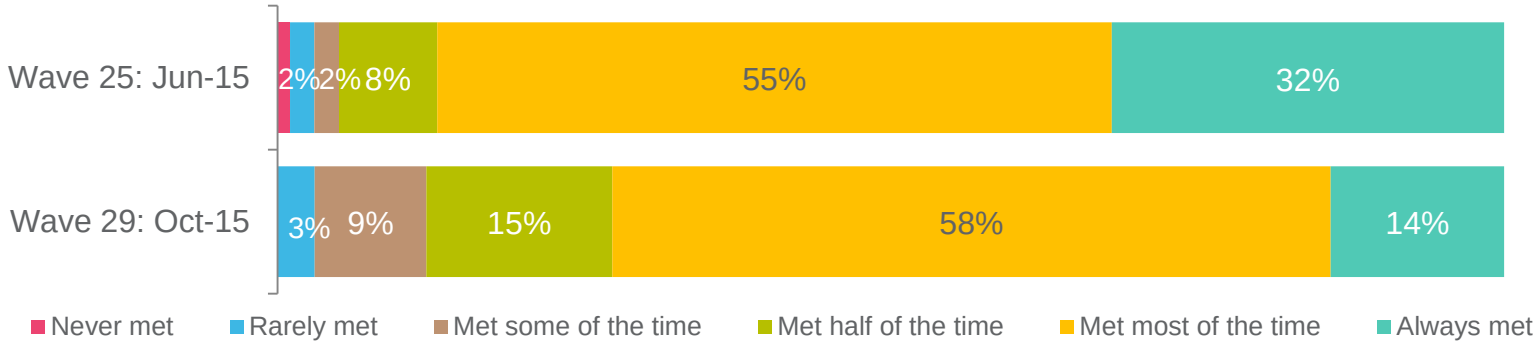
Q14. When purchasing Silverbeet, how important is Provenance to you?
Sample Wave 25 N=203, Wave 29 N=204

Freshness expectations for silverbeet have lowered this wave, with a substantial decline in freshness always being met.

Expected to stay fresh for **6.0** days

▲ 6.2 days, Wave 25

Expectations Met



Q12. How long do you expect Silverbeet to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy Silverbeet?
Sample Wave 25 N=203, Wave 29 N=204

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

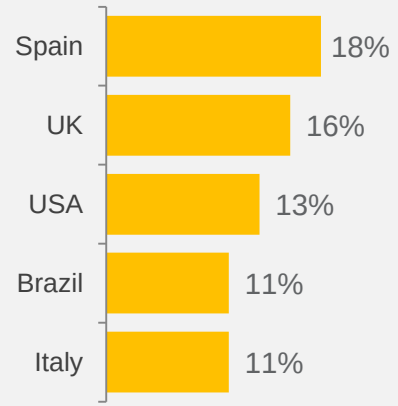
Silverbeet Product Launch Trends.

Silverbeet Global NPDs

August – October 2015

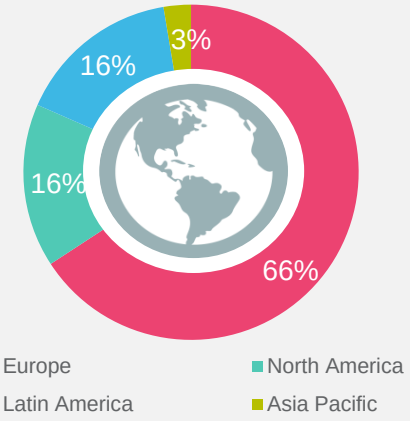
There were 38 products launched in the past three months that contained Silverbeet. Europe was the top region for launches, with Spain and the UK being the key countries. Flexible packaging remained the most common format. Launches were predominately in the fruit and vegetables category.

Country

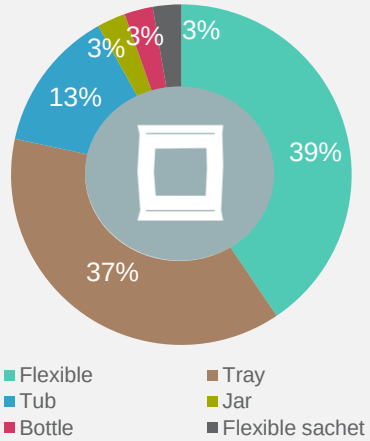


38 Global NPDs

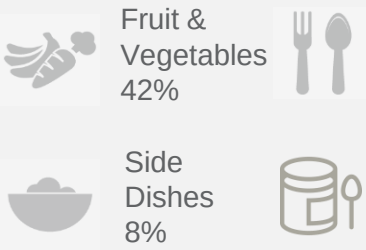
Region



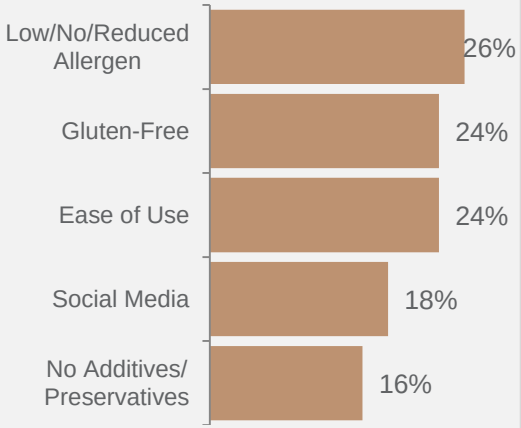
Top Pack Formats



Categories



Top Claims



Silverbeet Product Launches:
Last 3 Months (August – October 2015)
Summary

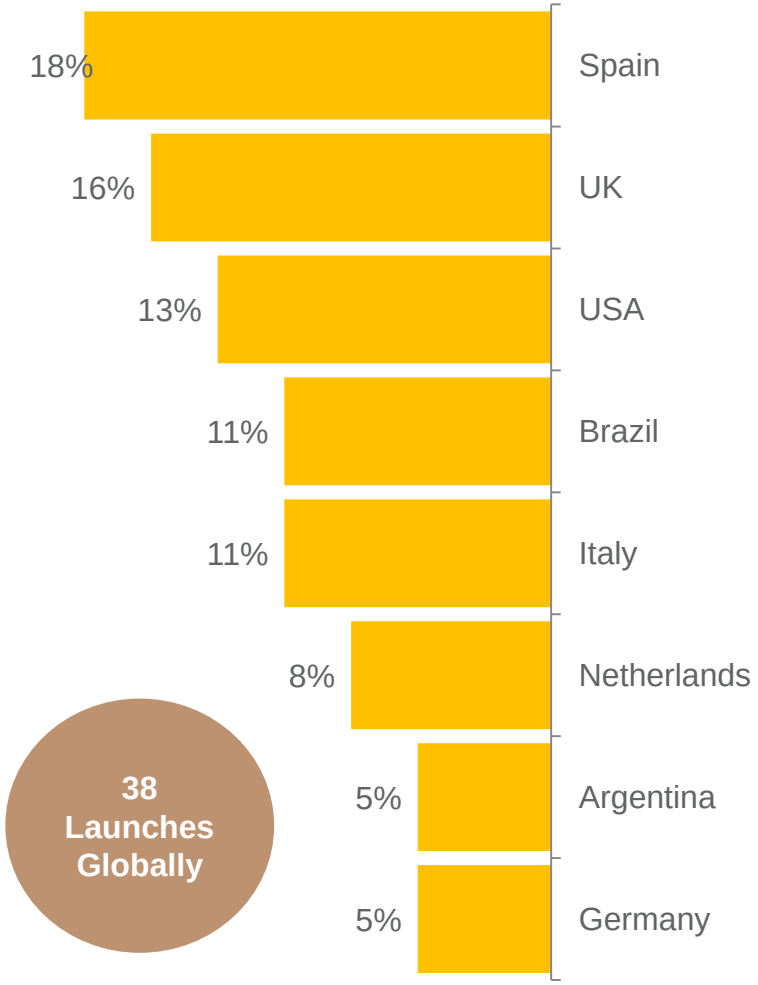
- A total of 38 products containing silverbeet as an ingredient were launched globally in the last 3 months.
- There were no silverbeet launches in Australia this quarter.
- Europe (66%) was clearly the top region for launches. Key countries for innovation were Spain (18%), UK (16%), and USA (13%).
- Flexible packaging was the most widely used format for launches (39%), followed by tray formats (37%).
- Top categories for product launches were fruit and vegetables (42%), meals and meal centres (37%) and side dishes (8%).
- Core claims for product launches globally included low/no/reduced allergen (26%), gluten-free (24%), and ease of use (24%).
- The most innovative product was pizza pockets from France. Other examples of products can be found at the end of the silverbeet trend report.

Source: Mintel (2015)

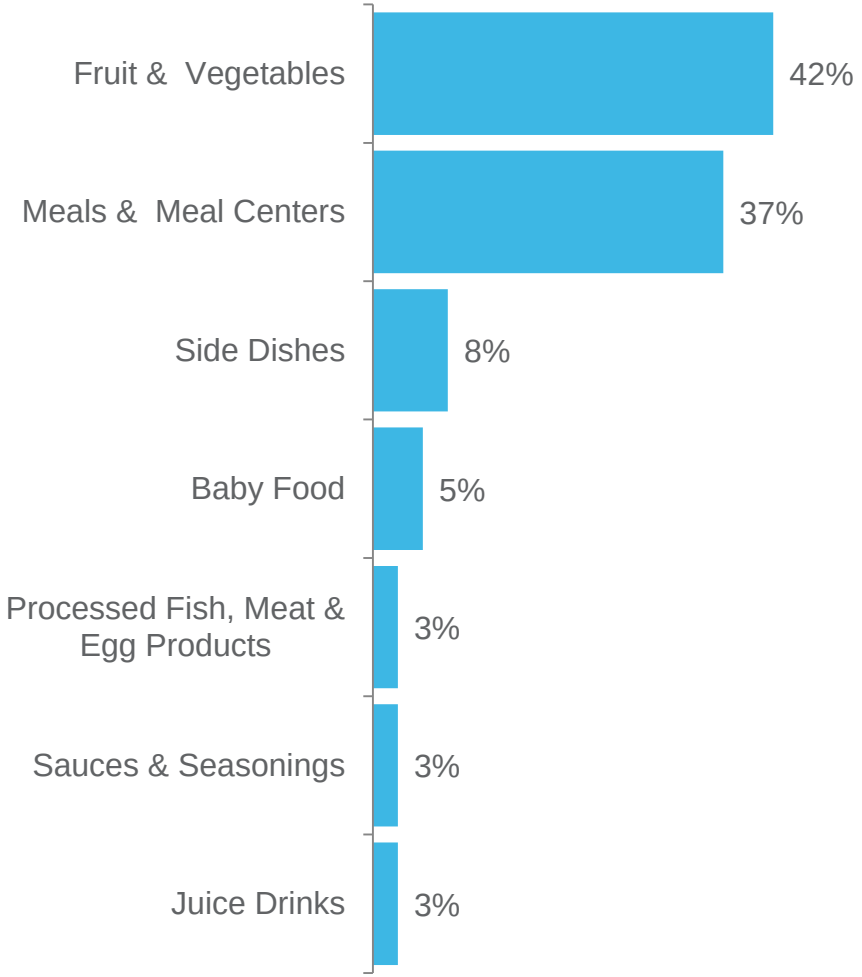
Silverbeet Launches
Country & Categories

- The most active country for launches in the last 3 months was Spain, followed by UK and USA.
- Fruit and vegetables are the key category for launches, with meals and side dishes also common launches.

Top Launch Countries



Top Launch Categories



Number of Global Silverbeet NPD for the L3M N=38

Horticulture Innovation Australia

colmar brunton.

Silverbeet Launches

Top Claims & Pack Formats Used

- The primary format of choice was flexible packaging, consistent with previous waves. Trays and tubs were also popular formats.
- Low/No/Reduced Allergen was the key claim used globally. Gluten-Free and ease of use were also prominent.

Pack Formats Used

Global	Flexible	39%
	Tray	37%
	Tub	13%
	Jar	3%
	Bottle	3%

Top Claims Used

Global	Low/No/Reduced Allergen	26%
	Gluten-Free	24%
	Ease of Use	24%
	Social Media	18%
	No Additives/Preservatives	16%

Number of Global Silverbeet NPD for the L3M N=38

Innovative Silverbeet Launches:
L3M (August – October 2015)

Steve's Leaves Luscious Leafy Tomato Trio (UK)

Steve's Leaves Luscious Leafy Tomato Trio is described as a salad kit containing slow-roasted, piccolo and a tomato and thyme dressing. Washed in spring water, this product retails in a 130g pack, bearing company's Facebook page information.

Claims:
Social Media

Tarall'Oro Ruote Ortolano Pasta (Brazil)

Tarall'Oro Massa Sêmola de Grão Duro Ruote Ortolano (Ruote Ortolano Pasta) has been added to the range. The product cooks in eight to nine minutes and retails in a 500g pack.

Claims:
N/A

Love Grace Green Sunshine Cold-Pressed Juice (USA)

Love Grace Green Sunshine Cold-Pressed Juice is a 100% juice that has been cold-pressed in order to deliver more nutrients and more results. It is made with chard, kale, spinach, celery, cucumber, apple and lemon. The ready-to-go, premium and USDA organic product is described as the perfect green juice, with a tart and bright flavor, and is said to be sunlight in a bottle. The HPP protected product is made pounds of the highest quality ingredients from Mother Earth, and is totally pure and never heated.

Claims:
Low/No/Reduced Allergen, GMO-Free, Social Media, Gluten-Free, Kosher, Vegan, Ethical - Environmentally Friendly Package, On-the-Go, Organic, No Animal Ingredients, Premium

Findus Speed Pocket Alsace-Style Pockets (France)

Findus Speed Pocket à l'Alsacienne (Alsace-Style Pockets) comprise a soft pizza dough pocket with a generous filling of small smoked ham, cream sauce and fondant onions. This limited edition recipe has been cooked without colourings and palm oil, and can be microwave or oven heated. This product retails in a partly recyclable 250g pack containing 2 x 125g individually wrapped units.

Claims:
No Additives/Preservatives, Ethical - Environmentally Friendly Package, Limited Edition, Time/Speed, Microwaveable

Source: Mintel (2015)

Innovative Silverbeet Launches:
L3M (August – October 2015)

AH Country Cress with Flower Leaves (Netherlands)

AH Land Kers Eetbare Bloemen (Country Cress with Flower Leaves) contains water cress, chard, red young leaf lettuce and edible flowers. The milk and gluten free product retails in an 80g pack and features the Healthy Choice logo.

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

Busseto Foods Natural Salami Selection (USA)

Busseto Foods Natural Salami Selection is now available. The USDA certified, all natural product has been minimally processed, and is free from artificial ingredients, added nitrites and nitrates, MSG, and gluten. It is said to be great for parties, and retails in a 12-oz. pack containing the following flavor varieties: Herb Coated Italian Dry Salami, Italian Dry Salami, and Black Pepper Italian Dry Salami.

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

Eat Smart Plant Powered Protein Super Caesar Salad Kit (USA)

Eat Smart Plant Powered Protein Super Caesar Salad Kit includes collard greens, Italian kale, red chard, broccoli stalk, savoy cabbage, dry roasted edamame, roasted sunflower seeds, chia seeds, parmesan cheese and classic Caesar dressing. The salad kit is a good source of protein providing 14g per serving, and an excellent source of fiber. It is rich in vitamin A and vitamin C, and is free from gluten and preservatives. This vegetarian product retails in a 6.2-oz. pack.

Claims:
No Additives/Preservatives, Low/No/Reduced Allergen, Vegetarian, Gluten-Free, High/Added Fiber

Eroski Chopped Chard (Spain)

Eroski Acelgas Troceadas (Chopped Chard) has been repackaged with a new design. This premium quality product now retails in a newly designed 660g jar.

Claims:
Premium

Source: Mintel (2015)

Innovative Silverbeet Launches:
L3M (August – October 2015)

Empório da Papinha Edu Soup with Beef, Beans, Potato, Chayote & Chard (Brazil)

Empório da Papinha Edu Sopinha de Carne Bovina, Feijão e Batata, Chuchu, Acelga (Edu Soup with Beef, Beans, Potato, Chayote & Chard) has been repackaged. This microwavable soup is described as containing meat, beans and vegetables, and is suitable for babies from eight months old onwards. The organic certified and gluten-free product retails in a 150g bisphenol A-free pack featuring Produto Orgânico Brasil and IBD logos.

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

Viviveg Organic Savoury Pie from Emilia Region (Italy)

Viviveg Erbazzone Emiliano Bio (Organic Savoury Pie from Emilia Region) is made with a whole wheat flour and filled with Italian chard. This product is 100% vegan and free from meat, egg and milk derivatives, palm oil, preservatives, artificial colourings, GMO, hydrogenated fat and refined sugar. It retails in a 150g pack featuring the EU Leaf and 100% Clean Energy Trenta logos.

Claims:
No Additives/Preservatives, Low/No/Reduced Allergen, No Animal Ingredients, Vegan, Ethical - Environmentally Friendly Product, Organic, Low/No/Reduced Transfat, Wholegrain, GMO-Free

Jumbo Chard (Argentina)

Jumbo Acelga (Chard) is new to the range. This frozen chard is 100% natural, can be microwaved without the need for defrosting, and retails in a 400g pack.

Claims:
All Natural Product, Microwaveable

Italiamo Potato Gnocchi with Tomato, Spinach & Chard (Spain)

Italiamo Minignocchi Tricolor (Potato Gnocchi with Tomato, Spinach & Chard) have been added to the range. The product retails in a 500g pack.

Claims:
N/A

Source: Mintel (2015)

Parsley.

On average, parsley is purchased four times per month, and is consumed around ten times per month. Consumption has slightly declined this wave.

Parsley is generally purchased from mainstream retailers such as Coles and Woolworths.

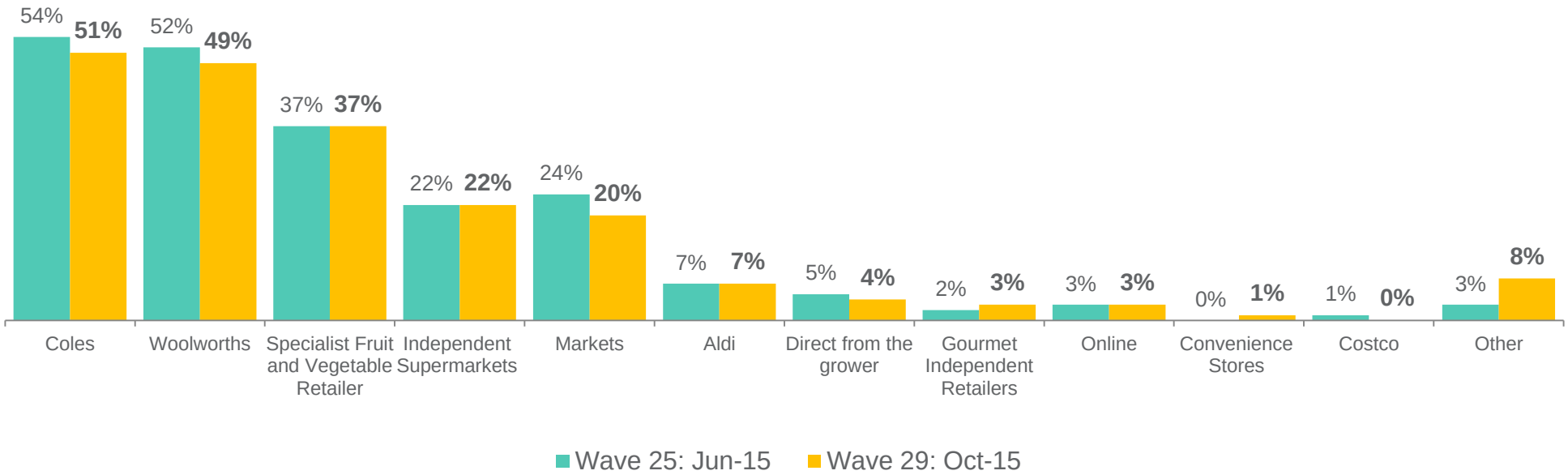
Average Purchase **3.6** times per month

▲ 3.9 times, Wave 25

Average Consumption **10.4** times per month

▲ 11.4 times, Wave 25

Purchase Channels



Q1. On average, how often do you purchase parsley?
Q2. On average, how often do you consume parsley?
Q5. From which of the following channels do you typically purchase parsley?
Sample Wave 25 N=201, Wave 29 N=205

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 purchases **0.2kg** of parsley, which is consistent with the previous wave.

— 0.2kg, Wave 25

Recalled last spend

Recalled last spend on parsley is **$2.80**, slightly below the last wave.

▲ $3.10, Wave 25

Value for money

Consumers' perceived value for money is fair for parsley **(5.6/10)**, relatively consistent with the previous wave.

▼ 5.7/10, Wave 25

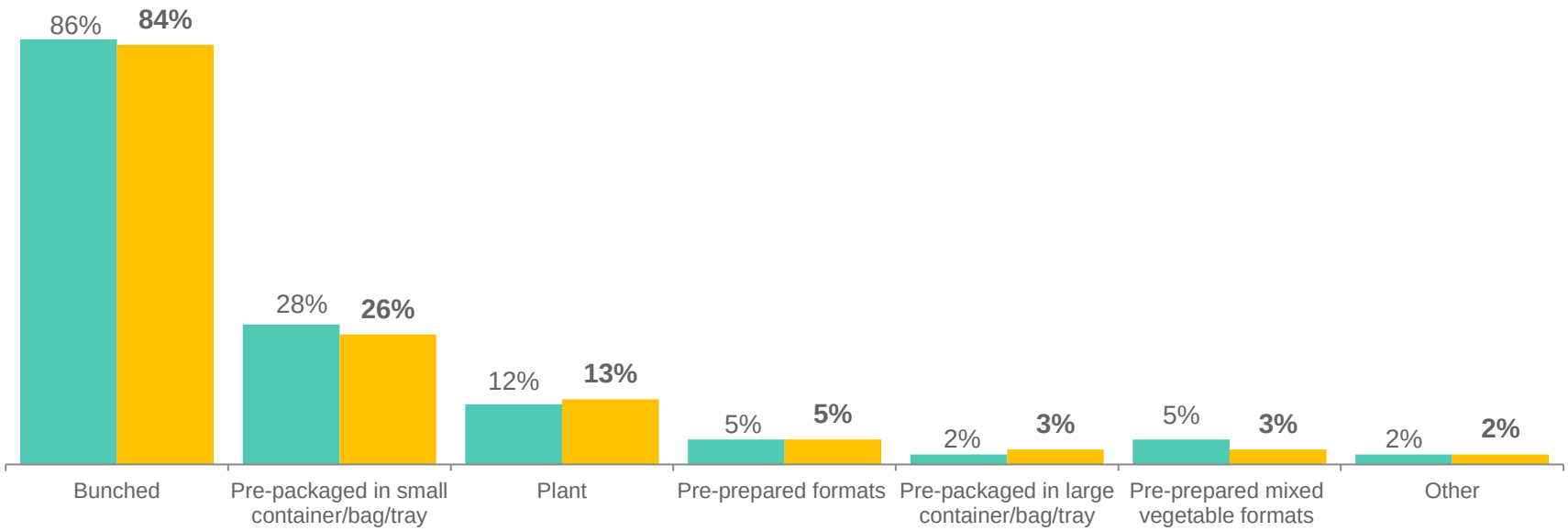
Q3. How much parsley do you typically purchase when you shop for it?
Q3b. To the best of your memory how much did this cost on your most recent typically purchase?
Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)
Sample Wave 25 N=201, Wave 29 N=205

Horticulture Innovation Australia

colmar brunton.

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

Bunched parsley is the most common purchase format, consistent with the past wave. Small containers and plants are other popular format options typically purchased by consumers.



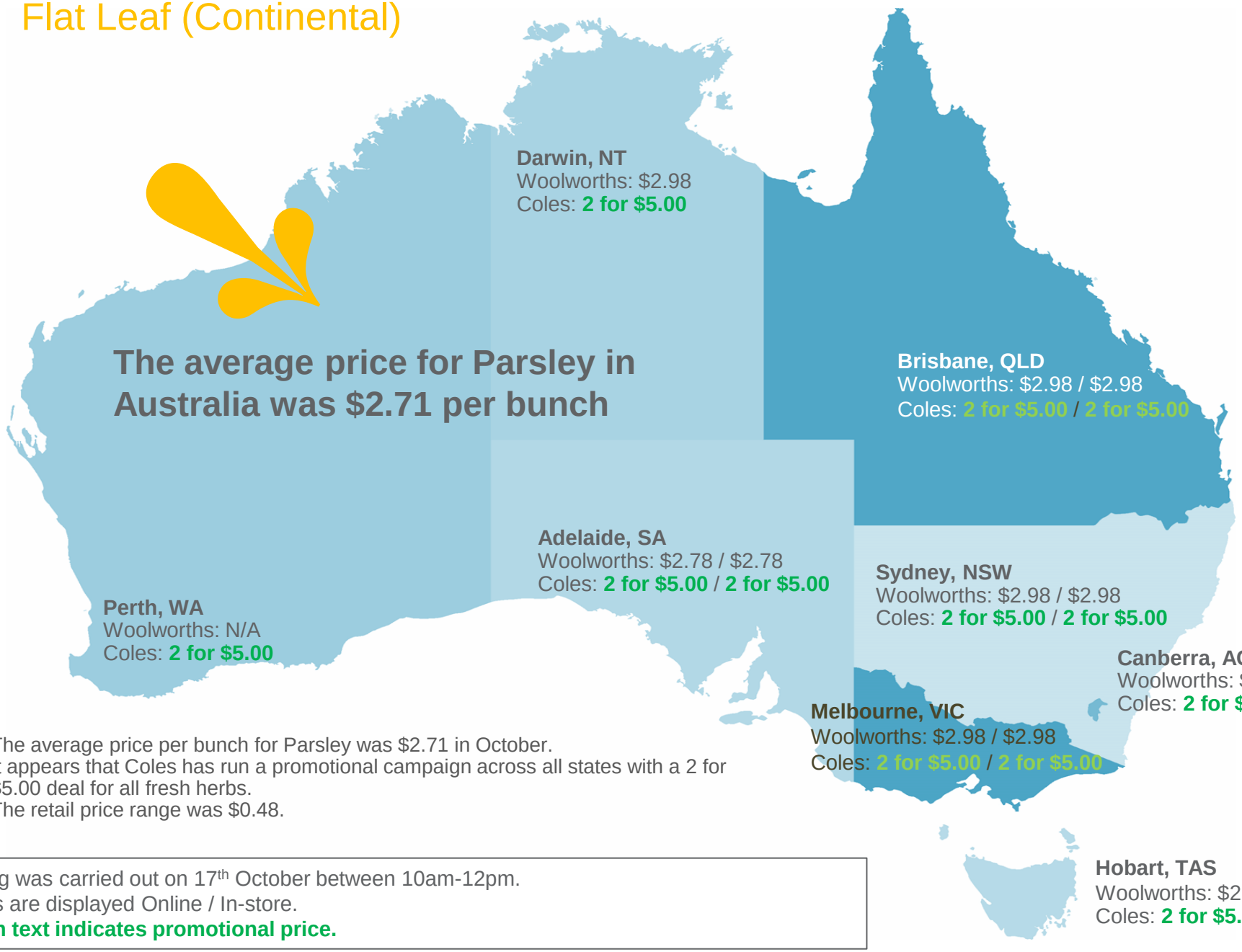
Q4b. In what fresh formats do you typically purchase Parsley?
Sample Wave 25 N=201, Wave 29 N=205

Horticulture Innovation Australia

colmar brunton.

Online and In-store Commodity Prices

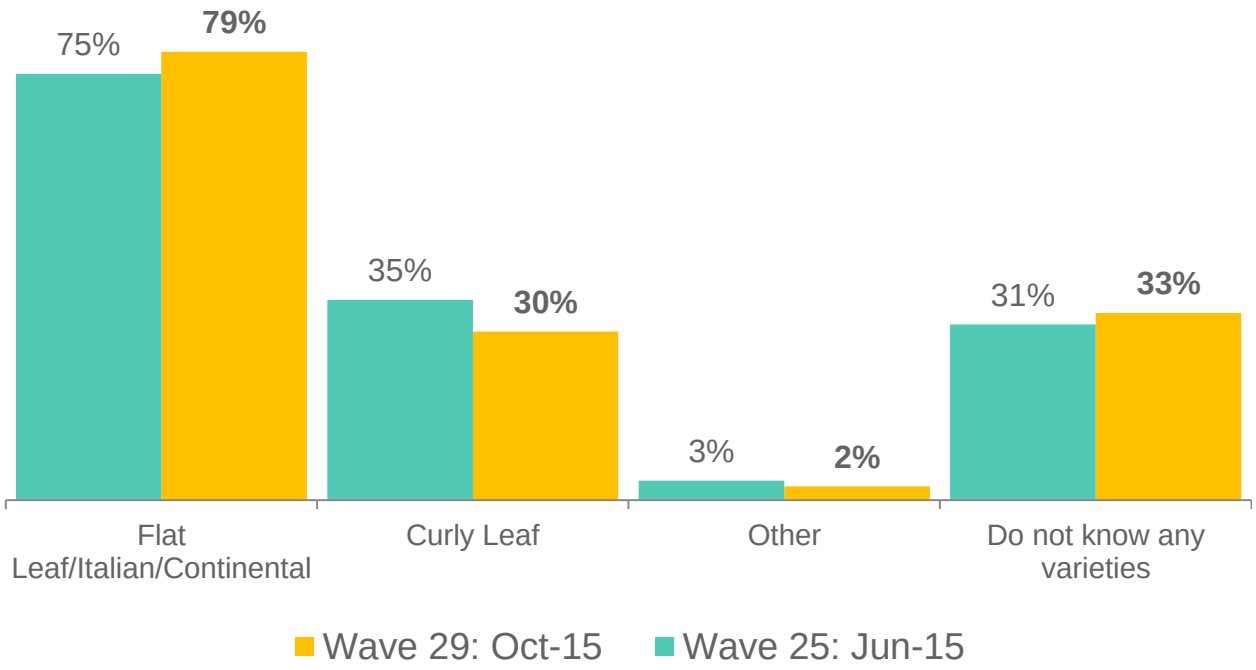
Flat Leaf (Continental)



- The average price per bunch for Parsley was $2.71 in October.
- It appears that Coles has run a promotional campaign across all states with a 2 for $5.00 deal for all fresh herbs.
- The retail price range was $0.48.

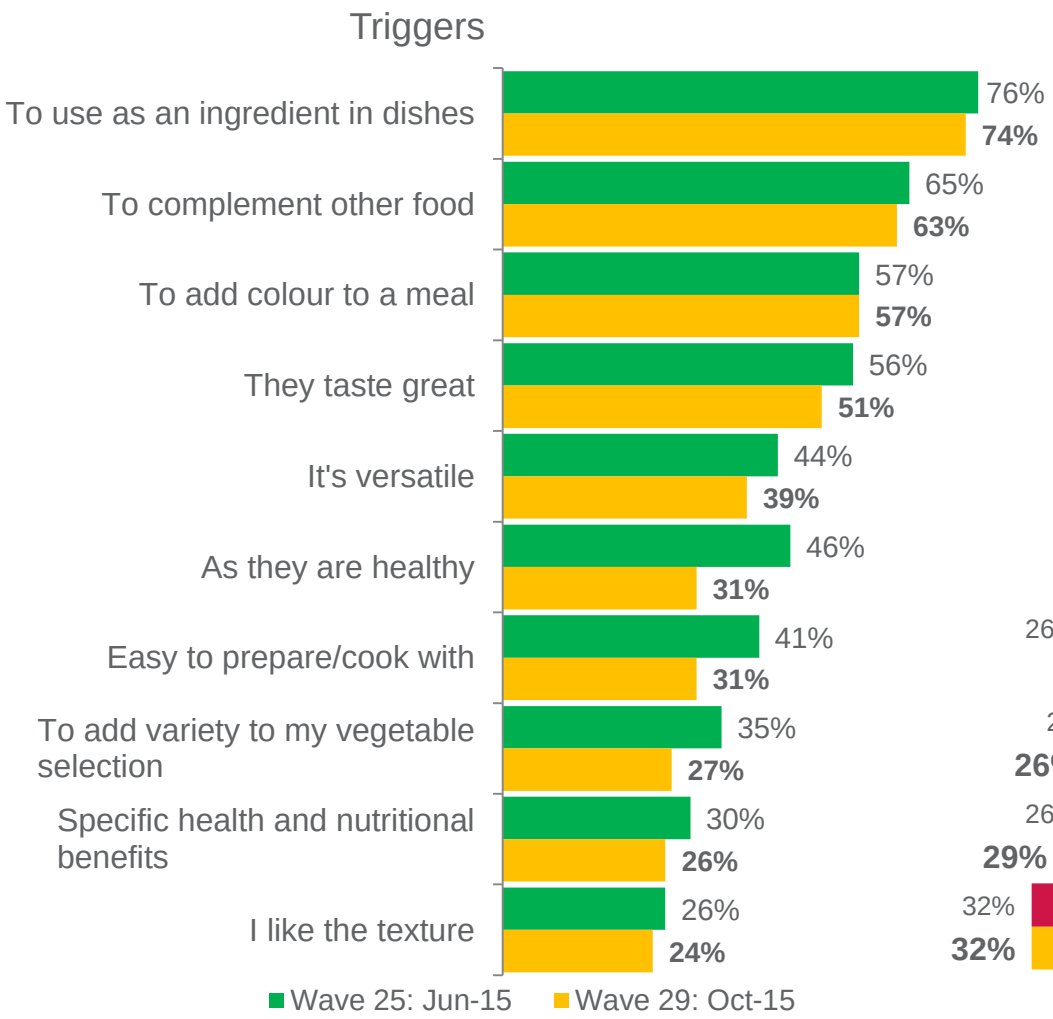
Pricing was carried out on 17th October between 10am-12pm.
Prices are displayed Online / In-store.
Green text indicates promotional price.

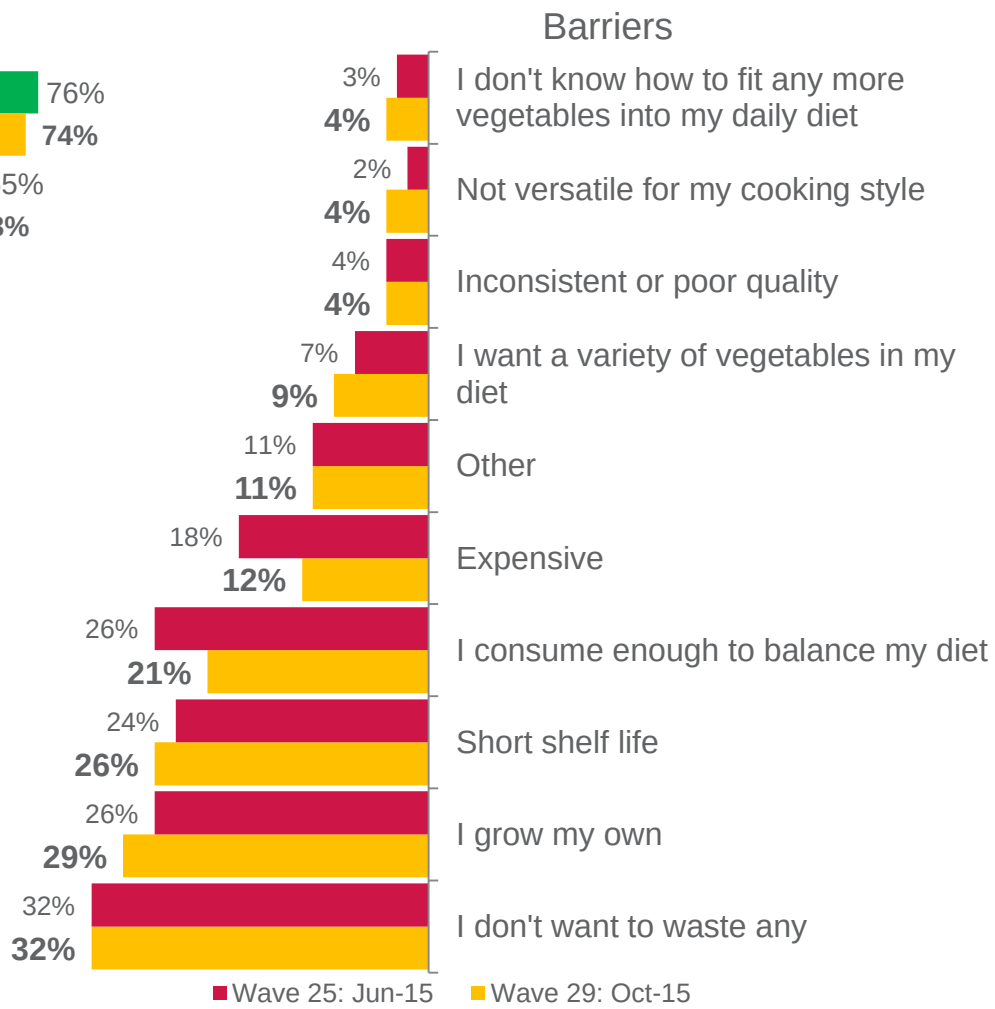
Spontaneous awareness is relatively high, with most consumers able to recall Flat Leaf/Italian/Continental parsley and Curly Leaf parsley, consistent with the previous wave.



Q6a. What varieties of parsley are you aware of? (unprompted)
Sample Wave 25 N=201, Wave 29 N=205

Using parsley as an ingredient in dishes, complementing other foods and adding colour to meals are the key drivers of purchase. In contrast, the key barriers to purchase are not wanting to waste any and growing their own parsley, which is consistent with the previous wave.





Q7. Which of the following reasons best describes why you purchase parsley?
Q8. Which reason best describes why you don't buy parsley more often?
Sample Wave 25 N=201, Wave 29 N=205

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Italian and Australian cuisines are popular for parsley dishes.

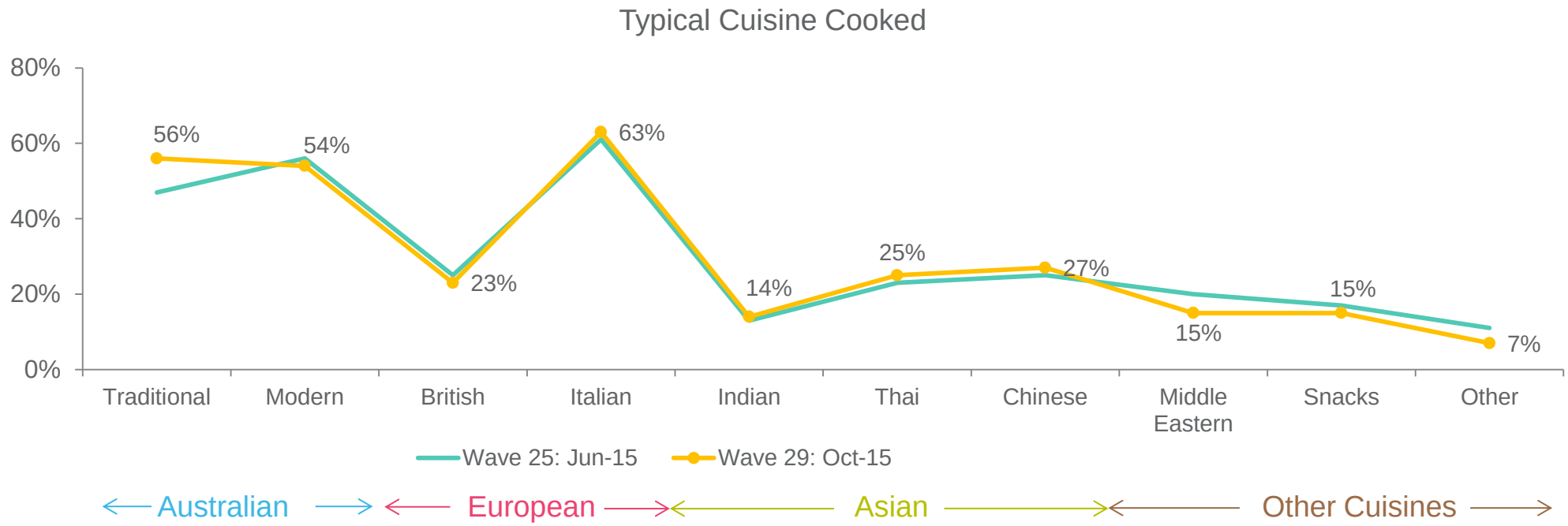
Consumption tends to occur during dinner and family meals, consistent with the past wave.

Top 5 Consumption Occasions

	Wave 25	Wave 29
Dinner	73%	**77%**
Family Meals	69%	**68%**
Weekday Meals	54%	**54%**
Weekend Meals	51%	**52%**
Quick Meals	51%	**50%**

37% used parsley when cooking a new recipe

▼ 34%, Wave 25



Q10. What cuisines do you cook/consume that use parsley?
Q11. Which of the following occasions do you typically consume/use parsley?
Sample Wave 25 N=201, Wave 29 N=205

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

Consumers prefer to use parsley with tomatoes and potatoes, relatively consistent with the previous wave. Parsley is generally consumed raw but also popular cooked in stir fries. This wave sees a substantial decline in soups as a cooking style, likely due to change in seasons.

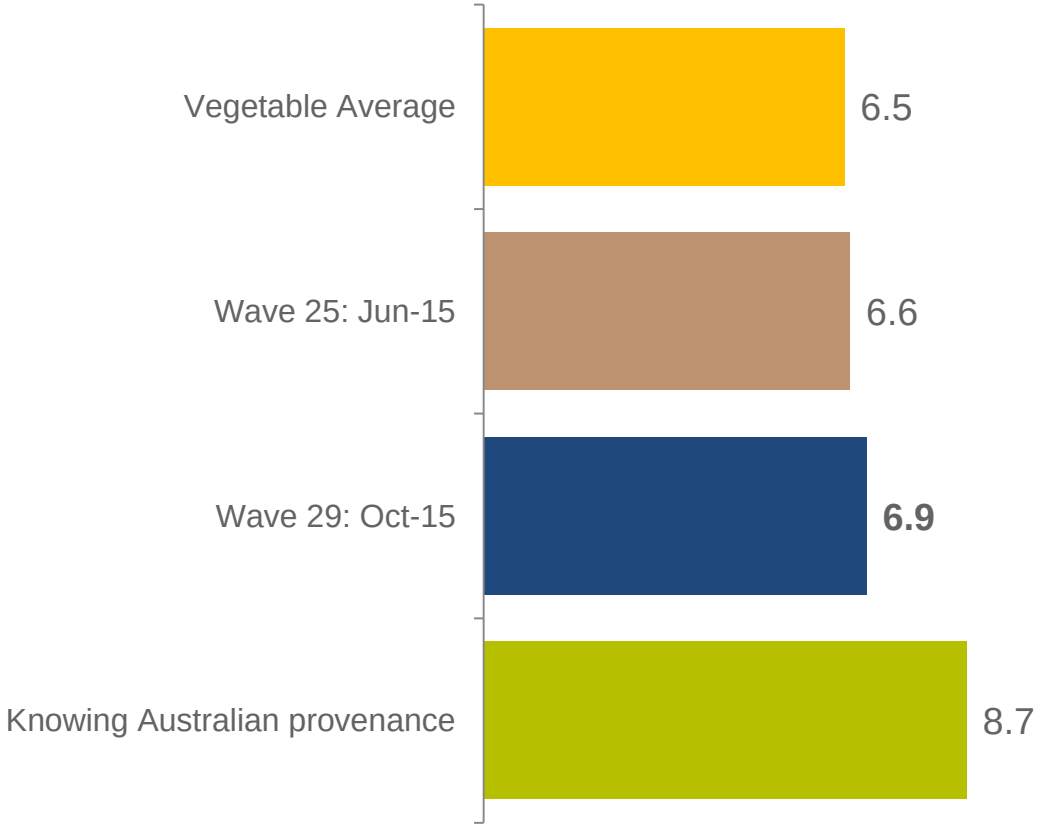
Accompanying Vegetables

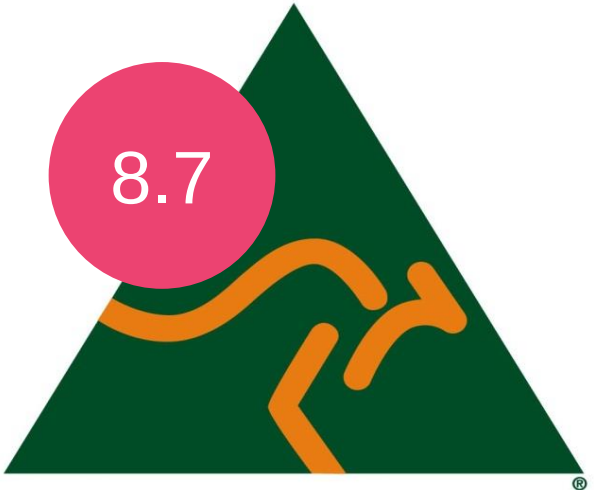
Tomato	60% ▲
Potato	57% ▼
Onion	47% –
Carrot	43% ▼
Capsicum	34% ▲

Top 10 Cooking Styles		
	Wave 25	Wave 29
Raw	63%	**67%**
Stir frying	40%	**48%**
Soup	52%	**37%**
Slow Cooking	26%	**26%**
Sautéing	20%	**21%**
Baking	20%	**20%**
Mashing	15%	**17%**
Frying	17%	**16%**
Roasting	13%	**9%**
Steaming	14%	**9%**

Q9. How do you typically cook parsley?
Q10a. And when are you serving parsley which of the following do you also serve together with this?
Sample Wave 25 N=201, Wave 29 N=205

Knowing that parsley is grown in Australia is the most important provenance information for consumers. General provenance and Australian provenance both increased from the last wave.





Q14. When purchasing parsley, how important is Provenance to you?
Sample Wave 25 N=201, Wave 29 N=205

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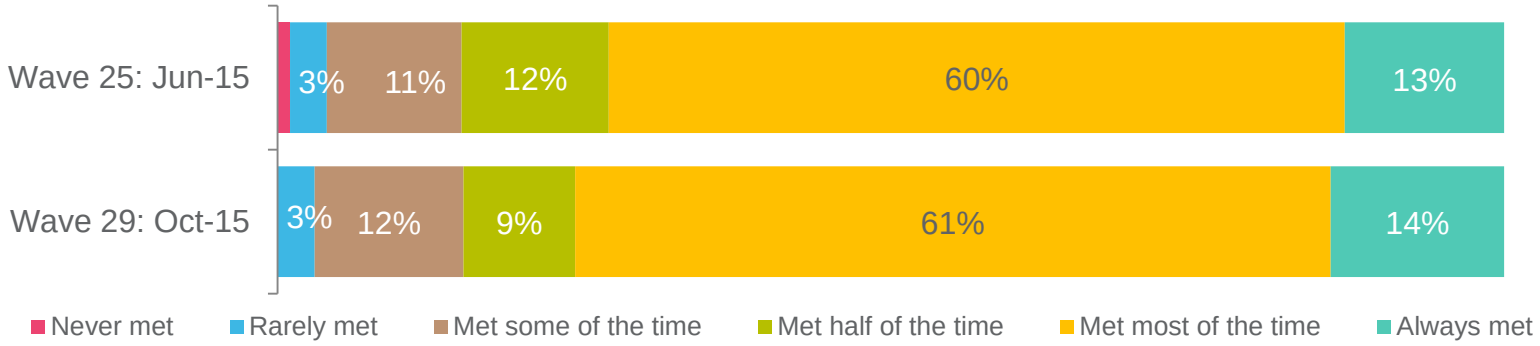
Consumers expect parsley to remain fresh for just over a week once purchased, which is being met most of the time. This is consistent with the previous wave.

Expected to stay fresh for **7.4** days

▲ 7.7 days, Wave 25

Expectations Met



Q12. How long do you expect parsley to stay fresh for, once you have purchased it?
Q13. How often is this length of freshness met when you buy parsley?
Sample Wave 25 N=201, Wave 29 N=205

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

Parsley Product Launch Trends.

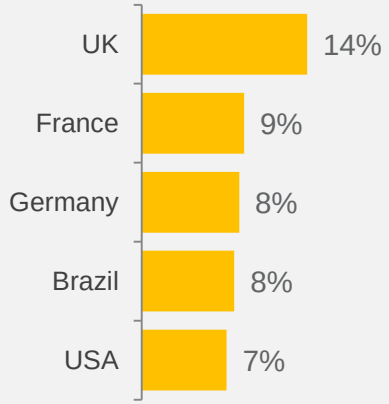
Parsley Global NPDs

August – October 2015

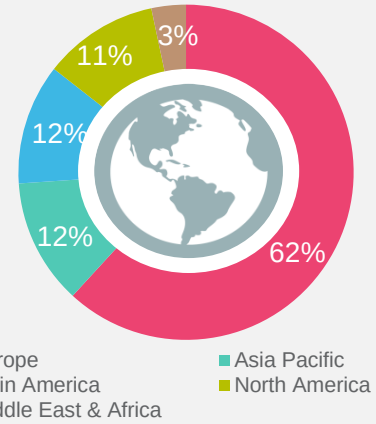
There were 1684 products launched in the past three months that contained Parsley, substantially lower than the previous wave (2009 launches). Europe and Asia Pacific were the key regions for launches, with UK and France being the main countries. Flexible packaging remained the most common format. Launches were predominately in the sauces and seasonings or meals categories.

1684 Global NPDs

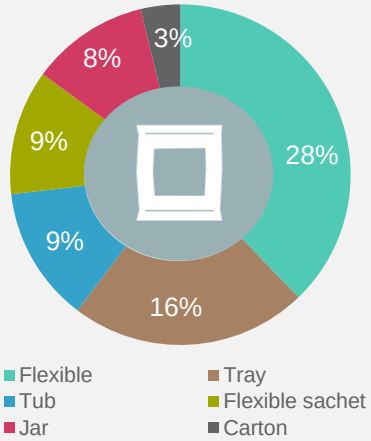
Country



Region



Top Pack Formats



Categories

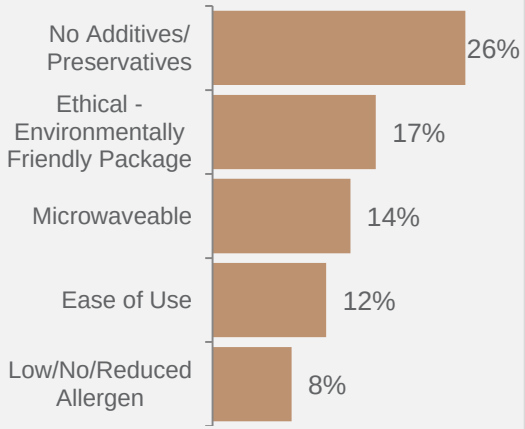
Sauces & Seasonings 26%

Meals 20%

Snacks 14%

Processed Products 13%

Top Claims



Parsley Product Launches:
Last 3 Months (August – October 2015)
Summary

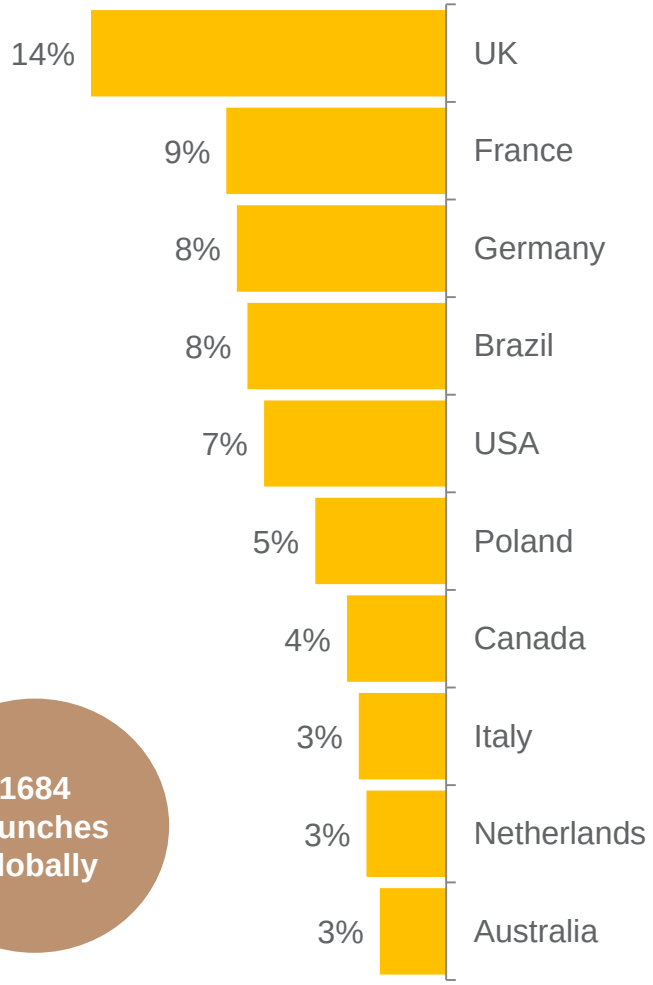
- A total of 1684 products containing parsley as an ingredient were launched globally in the last 3 months, substantially lower than the previous quarter (2009).
- There were 44 parsley launches in Australia this quarter.
- Europe (62%) was clearly the top region for launches. Key countries for innovation were UK (14%), France (9%) and Germany (8%).
- Flexible packaging was the widely used format for launches (28%), followed by tray formats (16%).
- Top categories for product launches were sauces and seasonings (26%), meals and meal centres (20%), snacks (14%), and processed products (13%).
- Core claims for product launches globally included no additives/preservatives (26%), ethical – environmentally friendly package (17%), microwaveable (14%), and ease of use (12%) .
- The most innovative product was a new Doritos tortilla chip flavour of yoghurt & herb mix, launched in Saudi Arabia. Other examples of products can be found at the end of the parsley trend report.

Source: Mintel (2015)

Parsley Launches
Country & Categories

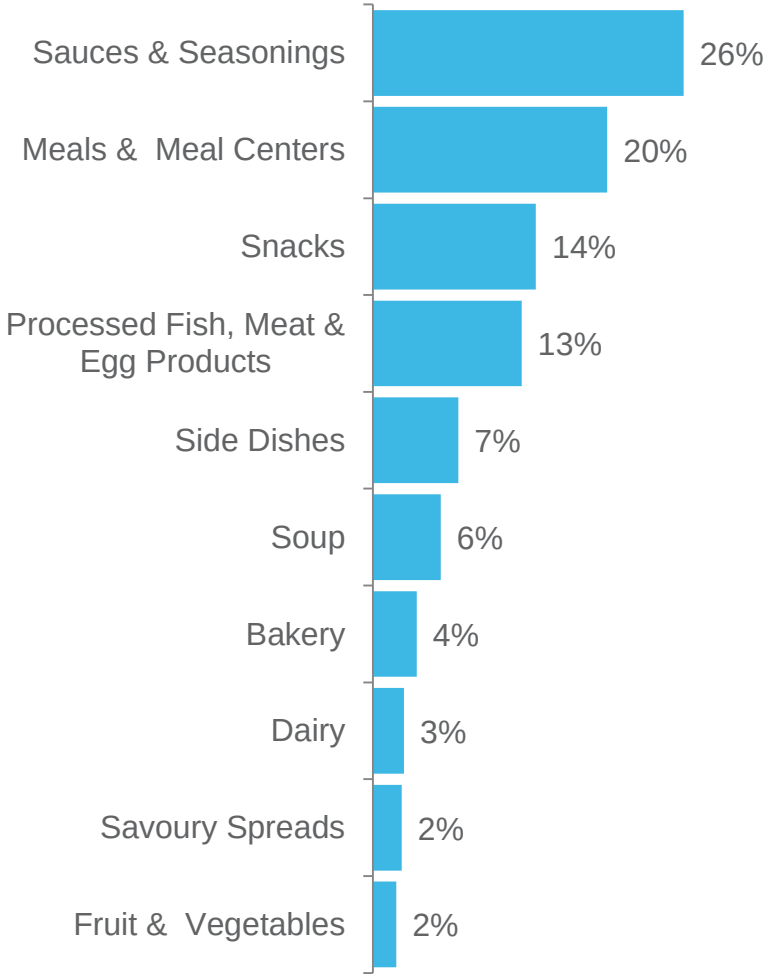
- The most active country for launches in the last 3 months was the UK, followed by France and Germany.
- Sauces and seasonings are the key category for launches, with meals and snacks also common launches.

Top Launch Countries



1684 Launches Globally

Top Launch Categories



Number of Global Parsley NPD for the L3M N=1684

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Parsley Launches

Top Claims & Pack Formats Used

- Pack formats were relatively consistent across regions, with the primary format of choice being flexible packaging.
- No additives and preservatives was the key claim used globally, with environmentally friendly packaging also a popularly utilised claim.

Pack Formats Used

Global	Flexible	28%
	Tray	16%
	Tub	9%
Europe	Flexible	25%
	Tray	23%
	Tub	13%
Asia Pacific	Flexible	33%
	Flexible sachet	12%
	Tray	11%

Top Claims Used

Global	No Additives/Preservatives	26%
	Ethical - Environmentally Friendly Package	17%
	Microwaveable	14%
Europe	No Additives/Preservatives	26%
	Ethical - Environmentally Friendly Package	22%
	Microwaveable	16%
Asia Pacific	No Additives/Preservatives	39%
	Time/Speed	17%
	Ethical - Environmentally Friendly Package	17%

Number of Global Parsley NPD for the L3M N=1684

Innovative Parsley Launches:
L3M (August – October 2015)

Ten Acre Chicken Soup Flavoured Potato Crisps (France)

Ten Acre Chicken Soup Flavoured Potato Crisps are hand cooked and said to be packed with crunch. They are free of gluten, dairy and MSG. The halal and kosher certified product is suitable for vegans, and retails in a 40g pack featuring the Facebook and Twitter links.

Claims:
No Additives/Preservatives, Low/No/Reduced Allergen, Vegan, Kosher, Social Media, Halal, Gluten-Free, No Animal Ingredients

I Heart Keenwah Herbes de Provence Quinoa Puffs (USA)

I Heart Keenwah Herbes de Provence Quinoa Puffs are described as naturally nutritious. The gluten free product contains no GMOs, is kosher certified, suitable for vegans, contains 5g of protein and retails in a 3-oz. pack.

Claims:
No Additives/Preservatives, Low/No/Reduced Allergen, GMO-Free, Vegan, Kosher, Gluten-Free, No Animal Ingredients

Secret Sausages Vegan Chilli Dogs Sausages (UK)

Secret Sausages Vegan Chilli Dogs Sausages are described as veggie hotdogs full of carrots, onions, mixed peppers and sweetcorn with a warm kick of chilli. The product is low in fat, free from GMO, gluten, milk, lactose, egg, yeast, wheat and oat, and has 90% less fat, 50% fewer calories and 50% less salt than normal sausages. The sausages are a good source of fibre, have been approved by the Vegetarian Society, and are made from a mix of garden vegetables, rice, natural herbs and spices.

Claims:
Low/No/Reduced Lactose, Low/No/Reduced Allergen, No Animal Ingredients, Low/No/Reduced Calorie, High/Added Fiber, Vegan, Ethical - Environmentally Friendly Package, Low/No/Reduced Fat, Gluten-Free, Low/No/Reduced Sodium, Vegetarian, Social Media, GMO-Free

Doritos Shots Yogurt & Herb Mix Flavoured Tortilla Chips (Saudi Arabia)

Doritos Shots Yogurt & Herb Mix Flavoured Tortilla Chips feature a bold flavour, a 3D shape and a crispy crunch texture. The product retails in a 140g pack, bearing Facebook and Twitter logos.

Claims:
Social Media

Source: Mintel (2015)

Innovative Parsley Launches:
L3M (August – October 2015)

American Flatbread Twisted 6 Cheese Pizza (USA)

American Flatbread Twisted 6 Cheese Pizza is a handmade, thin and crispy pizza baked in a wood-fired oven and topped with fresh mozzarella, asiago, smoked cheddar, sage cheese, tilsit cheese and Vermont mozzarella with red onion. The rBST-free, all-natural product has been repackaged and now retails in a 7.6-oz. pack featuring the Best Overall award from Every Day with Rachel Ray 2008.

Claims:
All Natural Product, Hormone Free

McCain Italian Style Mozzarella Sticks (Argentina)

McCain Bastones de Mozzarella Estilo Italiano (Italian Style Mozzarella Sticks) are now available. This product is ready in minutes, and retails in a 500g pack containing approximately 17 units.

Claims:
Time/Speed

Shine Organics Purify Apple, Guava, Kale, Strawberry, Parsley & Chia (USA)

Shine Organics Purify Apple, Guava, Kale, Strawberry, Parsley & Chia is described as the smartest on-the-go organic snack that contains a blend of organic fruits, veggies and micronutrients. This special blend of organic superfoods is said to help make clean eating delicious and convenient when people try to reset their diet or maintain a healthy lifestyle.

Claims:
No Additives/Preservatives, GMO-Free, Kosher, Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Ethical - Human, Ease of Use, Organic, High/Added Fiber, On-the-Go

Daloon Meatfree Vegetarian Nacho Steaks (Denmark)

Daloon Meatfree Vegetariske Nacho Bøffer (Vegetarian Nacho Steaks) are made with rice, cheddar cheese and jalapeños. This product retails in a 360g pack with four units.

Claims:
Vegetarian

Source: Mintel (2015)

Innovative Parsley Launches:
L3M (August – October 2015)

Ten Acre Captain Theodore's Lime & Sea Salt Popcorn (Denmark)

Ten Acre Lime & Havsalt Popcorn (Captain Theodore's Lime & Sea Salt Popcorn) is hand popped with love and provides less than 80 calories per serving. It is kosher and halal certified, suitable for vegans and vegetarians, and free of MSG, gluten and dairy. The product retails in a 28g pack featuring the manufacturer's Facebook and Twitter addresses.

Claims:
No Additives/Preservatives, Low/No/Reduced Allergen, Low/No/Reduced Calorie, Vegan, Kosher, Social Media, Halal, Gluten-Free, No Animal Ingredients, Vegetarian

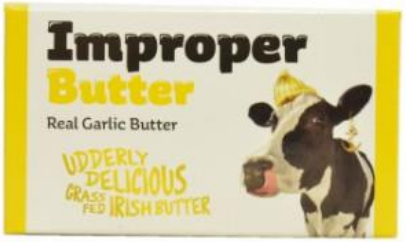
Hamé Easy Sandwich Carrot & Spring Onion Spread (Czech Republic)

Hamé Easy Sandwich Pomazánka s Karotkou a Jarní Cibulkou (Carrot & Spring Onion Spread) is now available. This sterilized product is retailed in a 100g pack.

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

Improper Butter Real Garlic Butter (UK)

Improper Butter Real Garlic Butter combines grass fed Irish butter with the freshest ingredients to add incredible flavour to dishes. The udderly delicious butter is recommended served warm, melted over griddled steak or fish, stirred through mash, or just spread onto toasted bread. It is claimed to make dinner time simple and retails in a 100g pack featuring the Facebook and Twitter logos. This product was on display at the Speciality & Fine Food Fair 2015 in Olympia, London.



Claims:
Ease of Use, Social Media

Boni Selection Cooked Atlantic Salmon (Belgium)

Boni Selection Saumon Atlantique Cuit (Cooked Atlantic Salmon) is now available. The product is rich in omega 3, has been traditionally cooked and retails in a 400g pack.

Claims:
N/A

Source: Mintel (2015)

Top Australian Parsley Launches:
L3M (August – October 2015)

Plumrose Italian On The Go Creamy Red Pepper & Mushroom Fusilli

Be Natural Moroccan Spice Dry Roasted Chickpeas

Fresh Fodder Homemade Basil Pesto

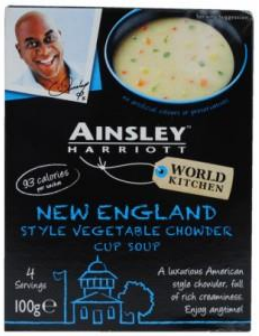
Coles Australian Baby Potatoes with Parsley & Butter

Love 'em Ingham Quick Cook Creamy Garlic Stuffed Chicken Breast

Impressed The Works Cold Pressed Juice

AGB International Garlic & Parsley Minis

Ainsley Harriott World Kitchen New England Style Vegetable Chowder Cup Soup



Source: Mintel (2015)

In the Media.

General Vegetable News
(August – October 2015)

- Queensland's largest carrot producer is hoping that entering the pre-cut trade will pay dividends in the new Asian market, particularly China. The company has about 1,500 acres of crops, including carrots, onions, green beans, and pumpkins.

- Managing Director, Richard Gorman stated that "we wanted to come up with a range of products that got through what we call non-tariff barriers to allow us to trade into China." A lack of biosecurity and health protocols are hampering efforts to open up trade access to Asia's burgeoning middle-class.

- The business has decided to delve into the pre-packaged market as they believe that it adds more value to their products.

Source: www.abc.net.au

Commodity News
(August – October 2015)

- Russell Dredge, a grower in Western Australia's Kimberley region is wrapping up his annual Halloween pumpkin harvest.
- His pumpkins are “large, orange and completely useless to eat.” The seeds get imported every year from America and are purely designed to be a good carving pumpkin.
- Mr. Dredge supplies both the major grocery chains and said roughly 10,000 of his pumpkins are destined for supermarket shelves. This season, he has picked 70-80 tonnes of the vegies.

http://www.abc.net.au/news

- A study conducted at Harvard University has found that the pigment that gives carrots its colour can slow age-related vision loss.
- Pigments called carotenoids can slow the progression of age-related macular degeneration (AMD).
- The Harvard University-led study used data from a population survey that tracked more than 100,000 over-50s over a period of 25 years.

http://www.dailymail.co.uk/health/

- Selected Waitrose stores in the UK launched Chinese sweet sprouting cauliflower from Produce World.
- The sweet sprouting cauliflower is hoped to be more appealing to children due to its taste and appearance, as it has a longer stem and less of a head than regular cauliflower.
- "At the moment we are doing a small commercial trial, if it is as successful as we expect it to be then we will definitely increase production next year," explains Peter Crowe, from Produce World.

http://www.freshplaza.com/

- General Mills is voluntarily recalling a small amount of frozen Cascadian Farm Cut Green Beans after a package tested positive for listeria, the second listeria-related recall for this brand of green bean this year.
- Food-safety experts say listeria is a particularly tricky and virulent pathogen that blossoms in refrigerated environments. Listeria typically doesn’t cause significant illnesses in healthy people but poses a high risk for pregnant women, newborns, older adults and people with weakened immune systems.

http://www.wsj.com/articles

Commodity News
(August – October 2015)

- Victoria's Gippsland has experienced its coldest winter in 26 years, playing havoc with horticultural crops.
- Baby Broccoli producer Joe Vizzari, said he had last 70 percent of Baby Broccoli production due to the "extreme cold" this year.
- Mr Vizzari said he was now looking north, to find warmer climates that would support asparagus and Baby Broccoli production. He also hoped to move his production up north towards Queensland as the climate would extend the growing season for the vegetables he produced.

http://www.abc.net.au/news

- Vertical farms are growing in popularity and are being called part of the solution to world hunger.
- Tanner Stewart, the Director of Nutriponics' vertical farm in Canada states how they have married fish farming with hydroponic vegetable production in what they call Aquaponics. "We raise Tilapia within this facility. We feed them an organic fish food, plant based, and while those fish are being raised we're pulling that nutrient rich water, you know we're after the nitrates, so we take that water and it gets fed to the plants."
- Plants being grown include swiss chard, buk choy and all manners of herbs. The current plant is expected to grow 50 tonnes of leafy greens a year while producing 3 or 4 tonnes of farmed tilapia.

http://www.630ched.com/

- Parsley, spinach and Chinese cabbage are just some of types of vegetables that have been found to contain more of certain essential nutrients than kale. However, the vegetable which scored a perfect nutrient density score of 100 was watercress.
- Professor Jennifer Di Noia says powerhouse food rankings aim to "provide clarity on the nutrient quality of the different foods and may aid in the selection of more nutrient-dense items within the powerhouse group".
- Parsley came in eighth position whilst kale was ranked fifteenth.

http://www.abc.net.au/news

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 contracted 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 29, October 2015) focuses on:

- Pumpkin
- Carrot
- Cauliflower
- Beans
- Baby Broccoli
- Silverbeet
- Parsley

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

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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.
- Topics covered in the questionnaire were vegetable purchase and consumption, category health, price and value perceptions, triggers and barriers to purchase and preparation and cooking preferences.
- An additional 2 ad-hoc questions are asked at the end of the questionnaire. The subjects of these questions are supplied by Horticulture Innovation Australia prior to each month to get feedback on topics of interest at that time.
- The questionnaire took 15 minutes to complete.
- Questions asked appear on the bottom of each page of this report. Unless stated otherwise, all scales were 0 - 10 scales, with higher scores indicating greater agreement/liking/importance etc.

General Respondent Questions

Demographics

Vegetable Consumption

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

Commodity Specific Questions

Category Health

Purchase & Consumption Habits

Price Perceptions & Average Spend

Triggers/Barriers to Purchase

Preparation Preferences

+ 2 Ad hoc Questions per Month

Sample.

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 month
- Purchased at least one of the monthly commodities (pumpkin, carrot, cauliflower, beans, baby broccoli, silverbeet, parsley) within the last month
- Were the main or joint grocery buyer

	Beans n=302	Carrot n=302	Cauliflower n=301	Pumpkin n=305	Baby Broccoli n=205	Silverbeet n=202	Parsley n=204
Gender							
Male	40%	32%	38%	30%	49%	37%	39%
Female	60%	68%	62%	70%	51%	63%	61%
Age							
18-24 y.o.	7%	5%	7%	6%	2%	1%	4%
25-34 y.o.	21%	18%	18%	18%	10%	10%	8%
35-44 y.o.	18%	17%	16%	16%	17%	10%	17%
45-54 y.o.	16%	22%	17%	17%	16%	20%	22%
55-64 y.o.	20%	18%	17%	19%	29%	24%	25%
65+ y.o.	19%	21%	25%	24%	24%	35%	24%
Household							
Single Income no Kids	21%	19%	24%	23%	22%	20%	18%
Double Income no Kids	18%	18%	16%	14%	17%	19%	17%
Young Families	18%	16%	15%	17%	8%	8%	13%
Established Families	23%	25%	23%	23%	22%	19%	23%
Empty Nesters	21%	22%	22%	24%	31%	35%	29%
Location							
New South Wales	16%	16%	16%	15%	11%	19%	18%
Victoria	14%	15%	17%	18%	15%	12%	18%
South Australia	20%	22%	22%	19%	20%	18%	24%
Queensland	22%	21%	24%	23%	18%	17%	10%
Western Australia	18%	15%	13%	14%	22%	20%	18%
Tasmania	7%	9%	7%	7%	7%	13%	7%
Australian Capital Territory	2%	2%	1%	3%	4%	2%	3%
Northern Territory	2%	0%	1%	1%	1%	0%	1%

Trends Research: Our Approach

- Colmar Brunton has used a combination of both desk research and in the field market research to explore the trends of each vegetable commodity being tracked this month.
- Our main source of secondary data for this report was collected from Mintel Global New Products Database (GNPD).
- This data source is used to analyse products launched around the globe in the last 3 months (L3M) that contained each vegetable being tracked as a core ingredient.
- Trends are determined at a global and regional level.
- Claims and pack types used for the launched products are explored and the relevant product categories are determined. Specific examples of products being launched around the globe that are particularly innovative are displayed for reference.
- Trend reports are provided monthly and will reflect the 7 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.

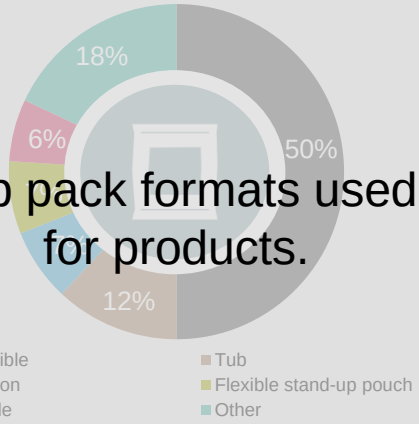
Commodity

Number of Launches L3M

Region

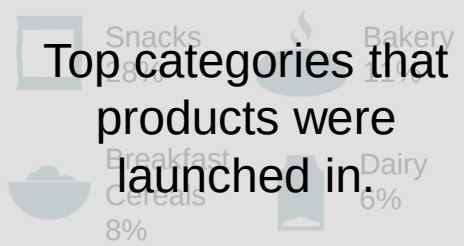
What regions new products were launched in.

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.

Thanks.

Horticulture Innovation Australia

colmar brunton.