

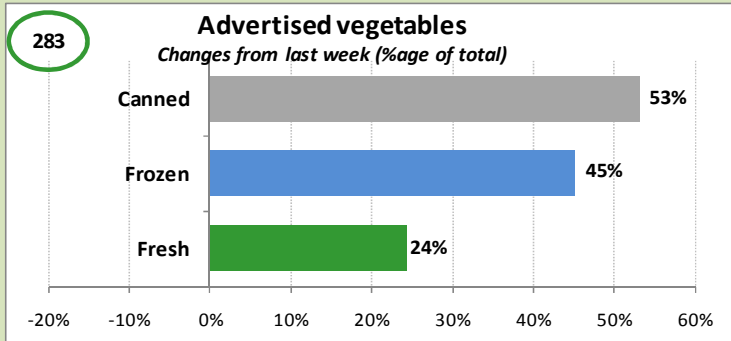
VEGINSIGHTS

Weekly vegetable market insights - A VIDP initiative



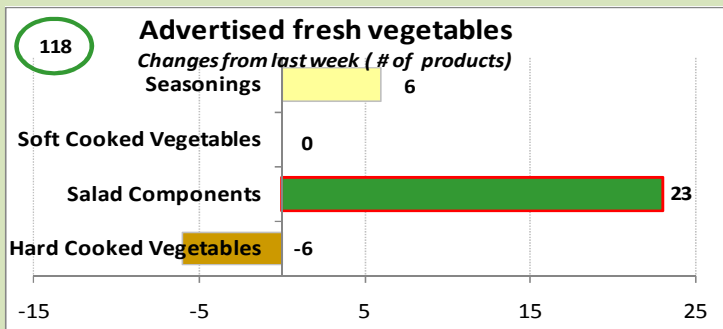
28 Apr 2010

Vegetable retail promotional activity



This week the exposure of vegetables increased by 37% to have 283 vegetable products advertised by the major retailers. This was driven by increases in product forms and led by Canned at 53%, Frozen 45% and Fresh 24%.

The number of fresh products advertised increased by 24% to 118. There were changes in the number of lines per category with the most significant a 23 line decrease in salad components.



Headlines

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- “Powerhouse” fruits & veggies identified
- Wrappers to “sniff out” fresh veggies
- Facebook helped reach more consumers
- Most popular vegetables purchased

Swap alternate “powerhouse” fruits & veggies for popular ones,

as recommended by scientists to increase the healthiness of diets. Researchers hold that a simple exchange could help in boosting the average intake of “polynutrients” - substances contained in fruits & veggies that protect the body from heart diseases and cancer. They recommend swapping of sweet potatoes for carrots (double the carotene levels), kale for spinach (3 times as much as lutein), raspberries for strawberries (3 times the ellagic acid), papaya for oranges and watercress for mustard.

This report identifies and recommends alternate fruits & veggies with added nutrition values that could influence and drive consumers’ shopping and consumption patterns.

Innovative producer chooses online media to reach consumers.

In a bid to communicate the flavour, freshness, and versatility



of its key product Artisan Lettuce, the company applied an on-pack sticker to the clamshells as a call to consumers, integrating its packaging to its online Facebook page on which it offered recipes, coupons, photos, contests, and more. Since then, several hundred people have joined its Facebook page. Rick Antle, the company’s CEO, states, “Key to the growing success of this outstanding product is continuing to find new ways to reach consumers in addition to our customers.”

This shows how an on-pack coupon can be aligned with the key new social network channels, like Facebook, and help in reaching more consumers.

Wrappers to “sniff” and identify fresh vegetables.

Swiss scientists and researchers at Manchester and Sheffield universities are developing small plastic wrappers made up of “FlexSmell”, a material with sensors that “sniff out” gasses, identifying and indicating the freshness in fruits & vegetables. This wrapping with sensors that is designed to detect hexanol, emitted from fruits & vegetables that indicates freshness, also has the ability to transmit the information wirelessly to shopkeepers and supermarkets.

This high-tech packaging innovation guides consumers at point of purchase to determine the freshest produce with optimum value.

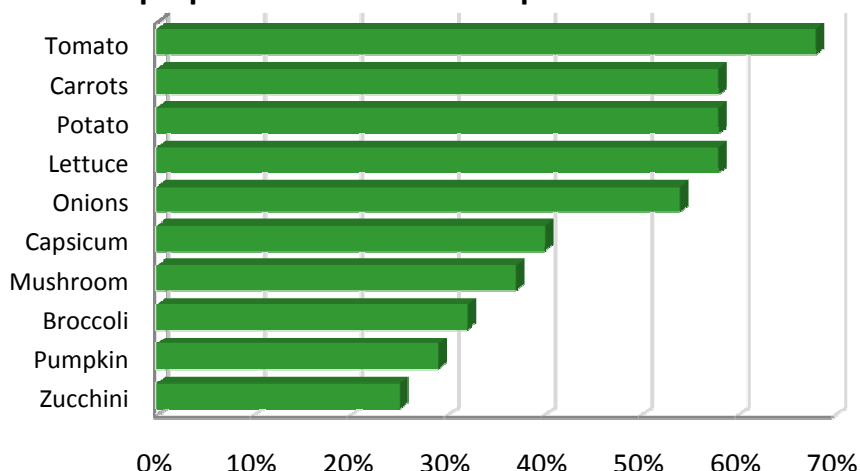
Weather	Sydney			Melbourne			Brisbane			Adelaide			Perth		
	Last w k	This w k	Last yr	Last w k	This w k	Last yr	Last w k	This w k	Last yr	Last w k	This w k	Last yr	Last w k	This w k	Last yr
Period Highs & Lows °C	12-25	17-31	13-25	11-28	12-30	9-25	16-28	18-29	15-30	7-29	14-30	10-28	11-27	8-28	6-30
Rainfall															
Rainfall (mm)	0.6	8.8	32.2	1.0	5.6	3.4	3.2	31.8	1.4	0.6	5.0	0.0	24.8	0	0.2

Vegetable Market Settings

The Mealpulse panel collects and analyses consumer responses on vegetable buying. This information is then combined with the data from other vegetable stakeholders to enable mapping and profiling market size and shares. The two charts and commentary below provide a profile of the most popular vegetables purchased and how purchasing can vary depending on the gender of the buyer.

A

Top 10 fresh vegetables proportion of households purchased



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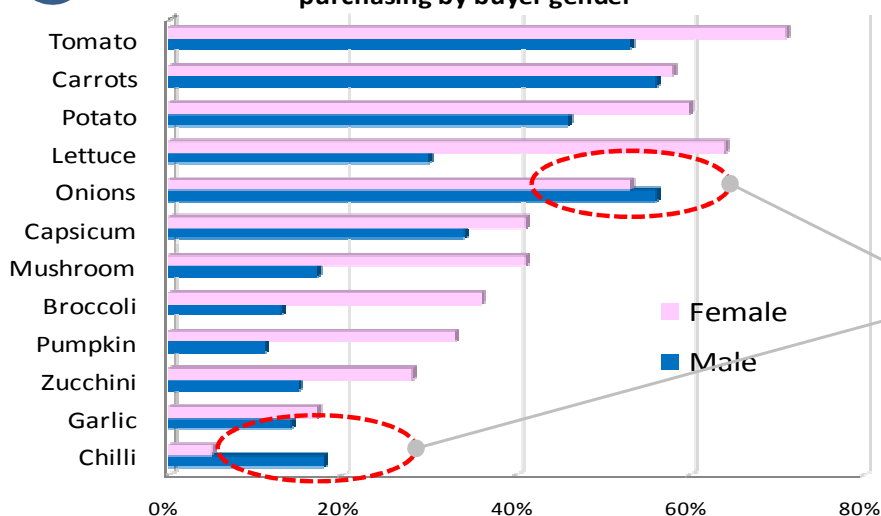
Most popular vegetable

Chart A profiles the 10 most commonly purchased fresh vegetables. Tomato clearly tops the list, being the only vegetable purchased by over 68% of households. It is followed by carrots, potato, and lettuce at 58% each and onions at 54%.

The balance of the top ten products that include capsicum, mushroom, broccoli, and zucchini are purchased by less than 40% of households.

B

Top fresh vegetables purchasing by buyer gender



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Gender buying patterns

Chart B reveals the buying patterns of the top 10 products including, garlic and chilli, by the gender of the buyer.

Evidently, some variations exist in the type of vegetable products purchased by females and males. A common denominator in these variations is evident in the purchasing of seasoning products. For example, chillies and onions are the only two products listed that are purchased more by males than females. This variation is attributed to the male palette being more attracted to these products.

It is also evident that females purchase more soft vegetables like lettuce, mushroom, and broccoli than males. These variations in the gender purchasing tendencies have implications for the marketing of these vegetable products.