

# **Horticulture Innovation Australia**

## **Final Report**

### **Vegetable Trend Forecasting and Analysis**

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## Summary

In 2016 Horticulture Innovation (“Hort. Innovation”) commissioned a review of emerging macro trends and levied commodities potentially relevant to those trends. The objective was to help Hort. Innovation and its Growers understand:

- How food trends work;
- What trends affecting vegetable consumption are on the horizon;
- What the effect of trends are;
- How trends can be created;
- Trial two commodities as a pilot, in other words, to identify two vegetables that would provide strong return on investment from a marketing campaign, and to develop a strategic blueprint for that marketing activity, should individual growers or conglomerates have the ability to fund such activity.

As part of Hort. Innovation’s key functions of: leadership, innovation and global competitiveness, the aim of this project, as discussed, was to provide insight on the topic of trends; future forecasting both in general and within the food space, plus how consumer trends are created using a wider understanding of the socio-economic forecast and current zeitgeist (i.e. dominant set of ideals and beliefs of society that underlies their motivation). In understanding this, we can provide a potential competitive advantage for the Australian vegetable industry by extrapolating those trends as a basis for strategic growth initiatives. Using two of Hort. Innovation’s current commodities, we then provide a more practical example of how this may be actioned right now to benefit the growers/industry financially by leveraging their proven health/nutritional benefits.

Hort. Innovation has witnessed firsthand the impact on certain commodities of current social trends within the food space: smashed avocado, sweet potato toast, kale as a super green etc. and seen the financial benefit of jumping on trend and communicating that out within the wider industry to ensure growers can maximise the opportunity; for example project ‘AV06029 – Investigation, Analysis And Development Of A Strategic Plan To Maximise Avocado Sales In The Foodservice Markets’. Therefore it seemed prevalent to undertake this project for Australian vegetable growers to have a simple paper and case study that provides a clear current understanding of the near future and their potential route to market to capitalize on this.

The key emerging macro (large scale) trends identified were:

- Dieting for balance
- Greater vegetarianism
- Searching for new, naturally derived beauty products
- Native as an extension for local
- Specific dietary habits:
  - Optimising gut health
  - Eating for mental health
  - Seeking hormonal balance and spirituality
  - Meat substitutes
  - From dietary supplements to meal replacements

It was determined that both broccoli, and eggplant (potentially a more exotic variety) were the two vegetables with the most potential. This was based on their nutritional and flavour characteristics being suited to current macro trends of:

- Increases in vegetarianism,
- A focus on dieting for mental health, and
- Growing attention to gut biome management.

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The proposed theoretical marketing strategy for both vegetables draws on previously successful campaigns for avocados and kale, which demonstrate the importance of forming partnerships with influential figures in the food service and hospitality industry to act as unpaid/paid advocates, championing the vegetable in the media and social media to gain interest and popularity, supported by in store sampling and other retailer driven promotions ideally to convert shoppers at point of purchase.

Workshop Australia recommends a business case be put forward for the investment in piloting the above program for broccoli, as an industry in need, to actually demonstrate the potential impact of going direct to industry/influencers on an emerging trend in order that it filters down from industry to the actual consumer and ultimately sales.

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## Keywords

<Broccoli; Eggplant; Trends; Future Forecasting; Industry Influencers; Australian Vegetables; Dietary Trends; Marketing; Advocates; Grower Education; Food Service; Vegetable Industry>

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## Introduction

Dietary and health habits have in the last decade, emerged as two of the most malleable (i.e. easily influenced) areas of consumer behaviour. The mainstream adoption of the term “superfood” is a demonstration of consumers’ readiness to reappraise even familiar foods in the context of current and emerging dietary, and health trends. Specific dietary habits are increasingly widely adopted and as a result, consumption of foods that have a role to play in dietary and health trends (once acknowledged by consumers as contributing to those trends) has the potential to experience significant increases in sales and consumption volume.

In 2016 Hort. Innovation commissioned a review of emerging macro trends and levied vegetables potentially relevant to those trends. The specific target audience for this project was levied Australian vegetable growers (“growers”) and the detail provided in the outputs of the project is included with an intended audience of both Hort. Innovation stakeholders and growers.

The project’s objective was twofold:

1. Help growers understand emerging trends:
  - a. How food trends work;
  - b. What trends affecting vegetable consumption are on the horizon;
  - c. What the effect of trends are;
  - d. How trends can be created;
  
2. Educate growers on how to best capitalize on these to gain advantage stimulating demand and increasing sales.
  - a. Trial two commodities as a pilot, in other words, to identify two levied vegetables that would provide strong return on investment from a marketing campaign, and to develop a theoretical strategic blueprint for that marketing activity.

Ultimately providing an increase in primary producer return and sustained growth for Australian vegetables.

Hort. Innovation has witnessed firsthand the impact on certain commodities of current social trends within the food space: smashed avocado, sweet potato toast, kale as a super green etc. and seen the financial benefit of jumping on trend and communicating that out within the wider industry to ensure growers can maximise the opportunity; for example project ‘AV06029 – Investigation, Analysis And Development Of A Strategic Plan To Maximise Avocado Sales In The Foodservice Markets’. Therefore it seemed prevalent to undertake this project for Australian vegetable growers to have a simple paper and case study that provides a clear current understanding of the near future and their potential route to market to capitalize upon this.

This study identified those vegetables that would potentially provide the greatest return on investment (“ROI”) from a marketing and PR campaign, and provided that theoretical blueprint for such a campaign for any growers looking to conduct their own self or conglomerate funded marketing activity.

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## Methodology

Hort. Innovation undertook a 6-month campaign of desk research and expert interviews broken into 5 distinct phases. This paper represents the summation of that research campaign.

This desk research project was originally agreed as follows, with fortnightly WIP presentations at the conclusion of each stage for discussion, review and refinement:

**1. Mapping a dietary trend**

Previous food trends were mapped along a time line from emergence, to peak, to eventual decline. Media presence, consumer interest and marketing activity were all mapped against the trajectory of these trends. (Using the google trends app which maps search volume for individual terms and further review of trending articles at peak times evidenced by the shifts in volume)

**2. Identifying emerging macro trends**

An audit of all 2015, 2016, and 2017 consumer trend forecasting reports was conducted in order to determine the dietary and health trends commonly expected to emerge and become mainstream in 2017 and 2018 (understanding these further with telephone/face-to-face interviews with leaders in their field)

**3. Establishing criteria for success**

Taking findings from the mapping of previous trends and applying those to the shortlisted currently emerging trends, 4 key factors to the development of a food trend were identified.

**4. Shortlisting potential vegetables**

Vegetables were shortlisted based on their role in two or more of the shortlisted emerging trends as well as their conforming to our previous mentioned 4 characteristics for a successful food trend.

**5. Sense checking with stakeholders**

Initial research findings, our rationale for selecting a particular vegetable, and a shortlist of potential vegetables were presented to HI staff and growers in February 2017. Following this discussion the shortlist was reduced to 2 commodities, each to be the focus of a potential theoretical individual marketing and PR campaign case study. And each substantiated by reviewing the latest sales data and feedback from Hort. Innovation's ongoing tracking and review.

The project is intended to be available to all Australian vegetable growers, providing access to information on trends and how to capitalise on them.

As mentioned, this project was reviewed and monitored at fortnightly intervals via telephone conference with the Project Leader from Hort. Innovation and the Project Coordinator and Strategic Planner from Workshop Australia to ensure the results and findings were focused and summarised to the best use for our audience.

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## Outputs

There are 3 main outputs from this project:

1. Final Report (this paper);
2. Summary Paper (distributed to growers)
3. 2 x Case Study Presentations (distributed to growers and available for workshops, meetings, etc. as a point of discussion)

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## Outcomes

The completion of this project achieved all outlined objectives, more specifically resulting in the following:

- **A clear summation of the upcoming trends that may effect vegetable consumption in the near future;**
  - This provides Hort. Innovation staff and growers with updated knowledge and foresight for planning their activities into the next few years to ensure they are relevant and future-proofed.
  - It also provides a framework and understanding should report readers wish to consider regular investment in overall trend tracking to ensure staff and growers are at the forefront of their industries.
  
- **Identification of two potential categories within the vegetable levy that fit the profile determined to benefit from such trends, with one in particular that is experiencing a surplus of production and waste;**
  - Through discussions with growers and Hort. Innovation stakeholders, it became apparent that broccoli is in need of investment and reinvigoration in the marketplace. Encouraging investment using this theoretical framework to kick-start the emergence of the identified trends could provide a much needed reduction in waste and increased return for growers for the short and longer term.
  
- **A clear theoretical framework for growers to follow;**
  - Provides Hort. Innovation staff and growers with a simple, easy to understand framework to understand how marketing activities could be applied within the current climate.

Whilst the project primarily identified relevant trends to leviable vegetables, it also highlighted broader trends which could be considered for longer-term development and investment. These trends signal potential for longer term investment initiatives that could provide the catalyst to new project initiatives rooted in solid consumer desires.

Overall, the economic and environmental impact of providing growers with actionable guides on consumer trends should provide benefit both in the short, medium and long term as wastage is reduced, return is increased and growers feel a clear sense of Hort. Innovation proactively driving growth through clear, relevant guidance for those that do not have marketing levies at this time.

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## Evaluation and discussion

- Check-ins with Hort. Innovation staff to review data to date and discuss and agree further areas to investigate, or focus a deeper dive into, lead us to park certain ideas that were perhaps not viable from a business perspective (e.g. native vegetables) or seen too far into the future to act upon now;
- During these checks-ins we discussed the leviable vegetables and the potential impact for them, which drove a lot of our direction at each point;
- With a final check-in and presentation to include the PRG, 2 vegetables were chosen to focus on, which also encompassed discussions outside of the forum to canvas opinion from a range of growers and wholesalers.

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## Recommendations

- Workshop recommends distribution of this report to levy-paying members to facilitate knowledge transfer.
- Workshop also recommends consideration of investment in a test case (i.e. broccoli) as a demonstration of how growers can actually use this information and proposed strategy via the trade, in order to physically demonstrate the results that this could reap. Broccoli would be the perfect example due to the current over-production and wastage. With a limited investment we could actually *provide real results* to inspire further action and collaboration.

## Intellectual property/commercialisation

No commercial IP generated.

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## Appendices

1. Summary Paper: Envisioning the Role of Specific Cruciferous and Nightshade Vegetables in Australia's Developing Dietary Habits, 2017 and Beyond.
2. Case Study 1: Broccoli
3. Case Study 2: Eggplant

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