



# Project Harvest Monthly Tracker Report.

**Wave 26, July 2015**

Vegetables tracked: Broccoli, Chillies, Corn,  
Green Peas, Kale, Leeks, Lettuce

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

**Horticulture  
Innovation**  
Australia



**colmar brunton.**



# Contents.

⇒ Executive Summary	3
⇒ Tracker Ad-hoc Questions	13
⇒ Overall Vegetable Tracker	16
⇒ Broccoli	20
⇒ Chilli	40
⇒ Lettuce	60
⇒ Sweet Corn	80
⇒ Green Peas	100
⇒ Kale	120
⇒ Leek	140
⇒ In the Media	160
⇒ Background & Methodology	164





# Wave 26: Executive Summary



# Industry Insight.

Health influences the food purchase decisions of the majority of consumers and we have seen this increase slowly but steadily over the past few years. According to Euromonitor, Fortified or Functional products comprised the fastest growing health category in 2014, followed by naturally healthy, organic and generally better-for-you products. In particular, protein has been cited as a “mega trend” and is on the verge of diversifying into a high potential opportunity.

In 2013, The IFIC’s Food and Health Survey showed that in the US, 57% of consumers made an effort to increase the amount of protein they consumed and 40% perceive the time of day they consume protein as important. Since then, savvy marketers have been helping consumers to understand their unique protein requirements with campaigns such as “Know your Number” by US cereal brand Kashi.

So what’s all the hype about? Simply put, proteins are the building blocks of life promoting cell growth and repair. Protein boosts metabolism and fills you up for longer on fewer calories. Traditionally, meat, eggs and dairy have been the best-known sources for protein; however they can also be high in saturated fat and cholesterol. **Enter vegetables.**

# Industry Insight continued.

Many vegetables contain protein but aren't classified as "high-protein" foods. However, protein-rich vegetables do exist and can contribute to the average of 46 grams that women need and 56 grams that men need. In addition to Brussels Sprouts, Artichokes and Asparagus, here are some of the rich sources of protein from the veggie patch:

Peas – one cup of cooked peas contains 9 grams of protein, more than a cup of milk!

Corn – a cup of cooked corn contains 5 grams

Leafy Greens – a cup of cooked spinach contains 5 grams; a cup of chopped broccoli 8.1 grams.

Kale – a cup of kale contain 2.5 grams

Whether they are being eaten in their natural state or appearing on the labels of plant-based protein powders, **Australian vegetables play a significant role in this consumer mega-trend and the industry should look to capitalise on this in communications and education in the future.**



## Wave 26 Fast Facts – Broccoli

- ▶ Consumer sentiment was in line with the Harvest average for all vegetables tracked thus far. Future purchase appears to remain stable.
- ▶ On average broccoli is purchased 4 times per month and consumed on 10 occasions per month. Mainstream retailers are the main purchase locations.
- ▶ Relatively consistent with previous months, 800g of broccoli is typically purchased. Value for money fell this wave – consumers only perceive fair value. Individual heads of broccoli are the preferred format.
- ▶ National pricing analysis revealed an average of \$6.39 per kg, which is substantially higher than May 2015 prices.
- ▶ Overall awareness of broccoli types remains low. Over half of consumers are unable to recall any variety of broccoli, and there is little differentiation between types.
- ▶ The key motivations for purchasing broccoli are health and convenience. The main barriers to purchase are shoppers already consuming enough for their needs and wanting a variety of vegetables in their diet.
- ▶ Broccoli is expected to remain fresh for a week. Expectations of freshness are stable and in line with previous waves.

**11**  
times per month

is the average number of times Australians are consuming broccoli – which is on the increase during winter.

**1.**

**Insight:**  
Expense is increasing as a barrier to purchase, and national retail prices are fluctuating between states and increasing across waves.

**Short Term Recommendation:**  
Communicate value for money to consumers by highlighting versatility and health benefits such as being high in vitamin C, K and A.

**2.**

**Insight:**  
Broccoli is typically served with potatoes, carrots and onion in cooler months. Consumers cook broccoli in a variety of ways, including roasting, stir frying, and boiling.

**Long Term Recommendation:**  
Pursue ‘roast veggie’ packaging opportunities for broccoli, carrots, potatoes and onion to meet increased needs.





## Wave 26 Fast Facts – Chilli

- > Chillies hold strong importance to consumers and are likely to be recommended to family and friends. There is strong future purchase intent for chillies.
- > Chillies are purchased 4 times a month and consumed on 12 occasions per month, consistent with past months. Purchase is from mainstream and specialist retailers.
- > Consumers generally purchase 300g of chillies, with recalled last spend consistent at \$4.00. Overall, chillies are perceived as fair value for money.
- > Pricing analysis revealed the average national price for long red chillies was \$18.16 per kg, slightly higher than prices in May 2015.
- > There is a high level of recall for chilli varieties. Jalapeno and birds eye have the greatest awareness amongst consumers.
- > Main triggers for purchasing chillies are to use as an ingredient in dishes and taste. The key barriers to purchase are consuming enough for their needs and not wanting to waste any.
- > Chillies are expected to remain fresh for just under 11 days, and this freshness is met most of the time.

24%

of consumers grow their own chillies.

1.

### Insight:

Concerns about wastage is a key barrier to future purchase of chillies.

### Short Term Recommendation:

Provide storage instructions at point of sale i.e. freezing chillies will retain flavour and heat reasonably well. This may increase consumer satisfaction and reduce barriers to purchase.

2.

### Insight:

There is major global development of new products that contain chilli.

### Long Term Recommendation:

Investigate product development opportunities such as including chillies in popularly cooked cuisines such as Mexican and Chinese.







## Wave 26 Fast Facts – Lettuce

- ▶ Lettuce holds high levels of satisfaction with consumers. Future purchase intent has remained stable.
- ▶ Lettuce is purchased on average 4 times per month and consumed approximately 13 times per month. Purchase is primarily from mainstream retailers.
- ▶ On average consumers are purchasing 700g of lettuce, which is slightly higher than the previous wave. Recalled last spend was \$2.90. Value for money is perceived as fair.
- ▶ Price tracking revealed an average price of \$2.92 per Iceberg lettuce head. This is fairly consistent with prices from May 2015.
- ▶ There is a high level of awareness of lettuce types, especially Iceberg and Cos.
- ▶ The main motivations for purchasing lettuce are complementing other food and health. Not wanting to waste any and short shelf life are the key barriers to purchase.
- ▶ Lettuce is expected to stay fresh for a week. Expectations of freshness are met most of the time, consistent with previous waves.

**\$2.92**  
each

is the average price for iceberg lettuce in July.

1.

### Insight:

Consumption occasions are decreasing in the winter months with short shelf life an increasing barrier to purchase.

### Short Term Recommendation:

Provide winter recipe ideas for lettuce to encourage stable consumption and usage throughout the year. This should enhance shelf life and freshness perceptions.

2.

### Insight:

Australian provenance of lettuce is very important to consumers.

### Long Term Recommendation:

Develop strategies with retailers and supply chain to ensure that Australian grown lettuce is always available to consumers. Limiting availability to only imported lettuce will impact on consumer satisfaction and purchase.





## Wave 26 Fast Facts – Sweet Corn

- Consumers are likely to recommend sweet corn to family and friends. There is strong future purchase intent, with some consumers indicating they will increase the amount they currently purchase.
- Purchase frequency of sweet corn is around 4 times per month and on average sweet corn is consumed on 7 occasions per month, which has improved from past months.
- Consumers consistently purchase 1.1kg of sweet corn. Perceived value for money is higher and it is considered good value for money.
- Analysis of pricing nationally revealed an average price of \$1.17 per cob. Pricing has remained relatively stable across months.
- Awareness of sweet corn remains very low, with three in ten consumers unable to recall a type.
- Taste is the primary trigger to purchase. Ease of preparation is becoming a stronger influence on purchase across waves. Wanting a variety of vegetables is the main barrier to purchase.
- Consumers expect sweet corn to remain fresh for approximately 8 days, and this longevity is likely to be met most of the time.

1.1kg

is the average weight of purchase for sweet corn.

1.

### Insight:

There has been a substantial increase in perceptions of sweet corn being a family favourite.

### Short Term Recommendation:

Ensure there are multiple sizes of pre-packaged sweet corn formats that will appeal to small and large families, such as 3-6 cob packs.

2.

### Insight:

Taste is a key trigger to purchase, however, consumers lack inspiration when cooking sweet corn.

### Long Term Recommendation:

There is an opportunity to develop cuisine specific flavoured butters in sweet corn pre-packaged formats (i.e. Mexican including chilli and coriander, or Thai including lemongrass and Thai basil).





## Wave 26 Fast Facts – Green Peas

- Green peas hold high levels of importance and consumers are likely to recommend peas to family and friends. Future purchase intent looks stable.
- Green peas are purchased on average 5 times per month and consumed on 10 occasions per month. Purchase is primarily from mainstream retailers.
- On average consumers are purchasing 700g of green peas, which is slightly down on past months. Recalled last spend was \$4.30. Value for money is perceived as fair.
- Price tracking revealed an average price of \$12.69 per kg of snow peas, substantially lower than the previous wave.
- There is a moderate level of awareness of green pea types, with Snow Peas and Snap Peas having the highest level of recall.
- The main motivations for purchasing green peas are ease of preparation and taste. Wanting a variety of vegetables and not wanting to waste any are the key barriers to purchase.
- Green peas are expected to stay fresh for over a week. Expectations of freshness are met most of the time, consistent with previous waves.

**\$12.69**  
per kg

is the average price per kg for snow peas in July 2015.

1.

### Insight:

There is a relatively good level of awareness for multiple types of green peas.

### Short Term Recommendation:

Further differentiate types of green peas by communicating specific flavour profiles and suitability in cooking and cuisine styles.

2.

### Insight:

The key barrier to purchase is lack of availability locally to consumers.

### Long Term Recommendation:

Investigate alternative supply chain and retail opportunities to ensure widespread availability. This will ensure future purchase and increase consumer satisfaction.





## Wave 26 Fast Facts – Kale

- There are high levels of interest for kale, with consumers likely to recommend it to family and friends. There is strong future purchase intent, with some consumers indicating they will increase the amount they currently purchase.
- Purchase frequency of kale is 4 times per month and on average is consumed on nearly 9 occasions per month.
- On average, consumers purchase 700g of kale.
- Analysis of pricing nationally revealed an average price of \$3.72 per bunch. Kale is perceived to be good value for money.
- Awareness of kale varieties is very low, with 85% unable to recall a type.
- Health and nutrition are the primary triggers to purchase. Consuming enough for their needs and not wanting to waste any is the main barrier to purchase.
- Consumers expect kale to remain fresh for nearly a week, and this longevity is likely to be met most of the time.

9  
times per  
month

is the average number of times Australians are consuming kale.

1.

### Insight:

There is high interest and overall awareness of kale, which has been dubbed the latest superfood.

### Short Term Recommendation:

Communicate the nutritional benefits of kale. Furthermore, consumers are still finding new ways of incorporating kale into their meals, and thus, at point of sale, highlight recipe ideas including snacks, juices and meals

2.

### Insight:

Spontaneous awareness of kale varieties is low, with 85% of consumers unable to recall a type.

### Short Term Recommendation:

Educate consumers on the different types of kale, their flavour profiles and suitability for cooking styles e.g. steaming, stir frying, soups.







## Wave 26 Fast Facts – Leek

- ▶ Consumer sentiment for leeks are in line with the Harvest average for all vegetables tracked thus far. Future purchase is also consistent with the average of all vegetables tracked.
- ▶ Leeks are purchased on average twice per month and consumed four times per month. Purchase is primarily from mainstream retailers.
- ▶ On average consumers are purchasing 800g of leek. Recalled last spend was \$3.30, with value for money perceived to be fair.
- ▶ Price tracking revealed an average price of \$2.39 per leek.
- ▶ Awareness of leek types is very low, with 85% of consumers unable to recall a type.
- ▶ The main motivations for purchasing leeks are to use as an ingredient in dishes and that they taste great. Already consuming enough and price are the key barriers to purchase.
- ▶ Leeks are expected to stay fresh for over a week. Expectations of freshness are met most of the time.

**\$2.39**  
each

is the average price per leek in July 2015.

1.

### Insight:

Leeks are only consumed on average four times per month, with soups being the main cooking style used.

### Short Term Recommendation:

Educate consumers on the versatility of leeks and different cooking styles (outside of soup), eg casseroles in winter. Provide recipe ideas to create greater interest and inspiration.

2.

### Insight:

Three percent of new product launches occurred domestically in the last three months.

### Long Term Recommendation:

Investigate development of meals, sauces and seasonings that contain leek as an ingredient. Popular dishes overseas include pizza, curry, quiche and pate.





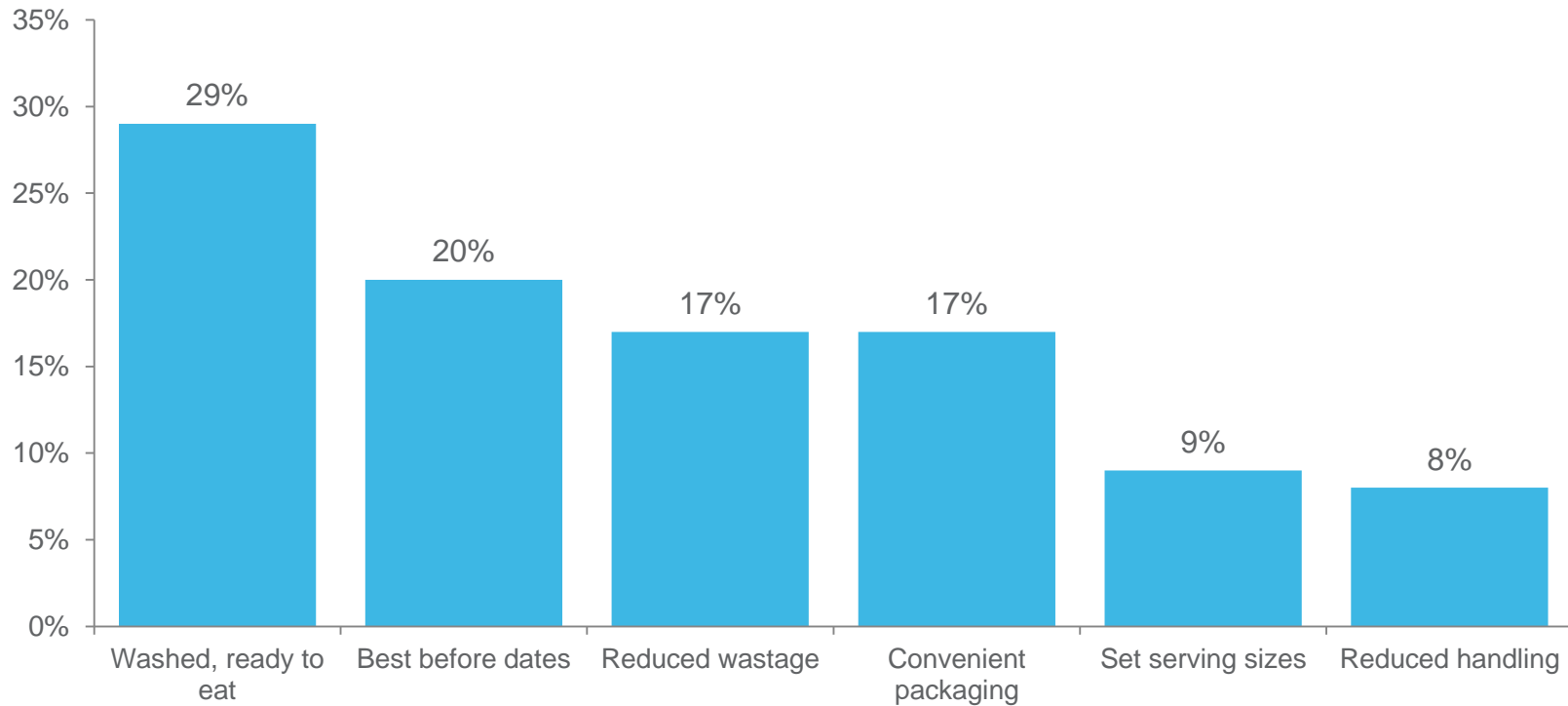
**Wave 26:**  
Response to Ad hoc  
Questions



# Pre-Packaged Vegetables. Most important aspects.

Being washed and ready to eat are the most important aspects for consumers in regards to pre-packaged vegetables.

Other key aspects that consumers look for include best before dates, reduced wastage and convenient packaging.

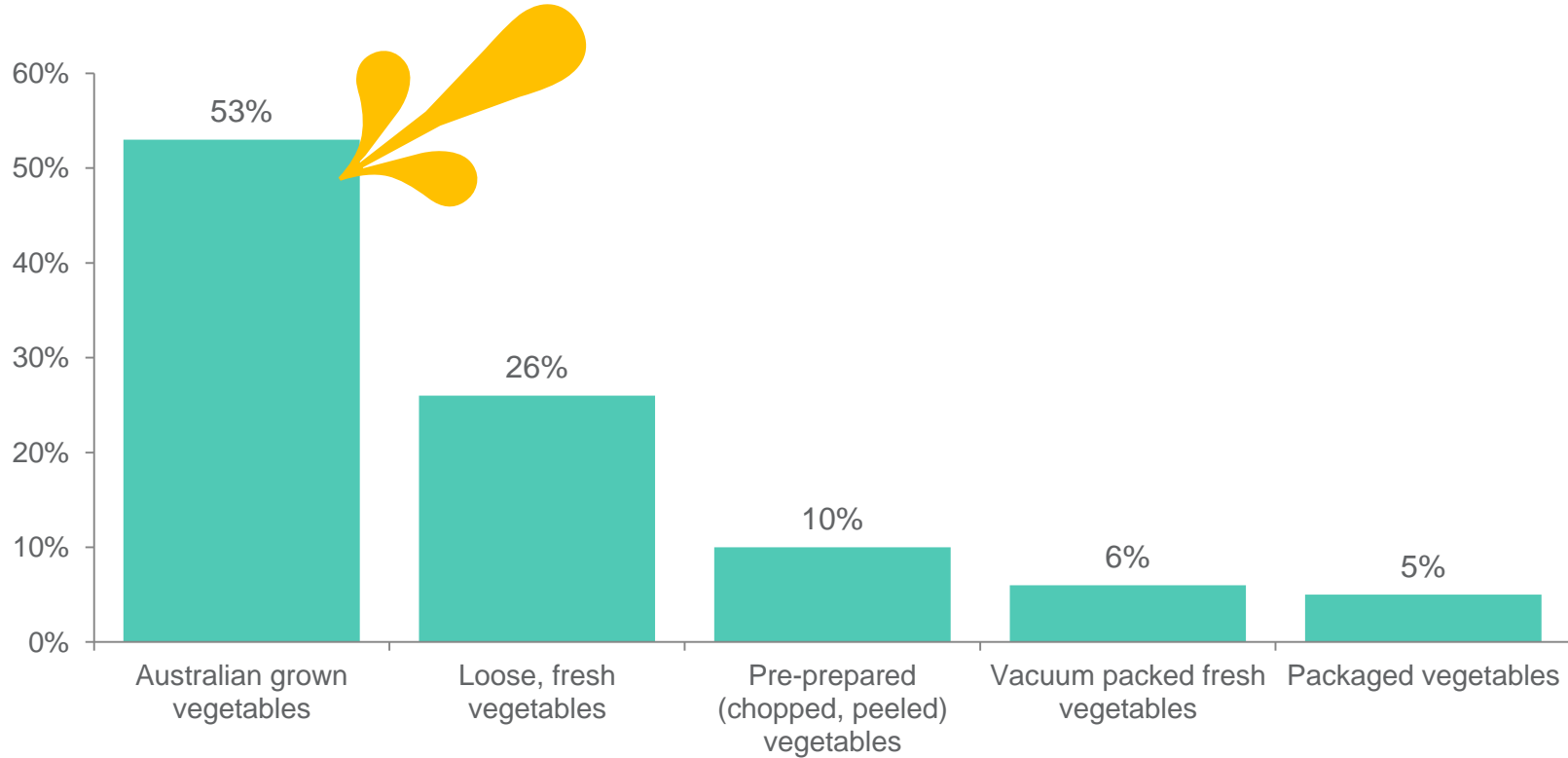






# Willingness to Pay More. Typical fresh vegetable shop.

Shoppers are most willing to pay more for Australian grown vegetables during their typical fresh vegetable shop. In contrast, consumers are less likely to pay more money for pre-prepared, vacuum packaged and packaged vegetables, demonstrating that loose vegetables are the preferred purchase format.



AHW26Q2 What are you willing to spend more money on, compared to your typical fresh vegetable shop?  
Base: N=626



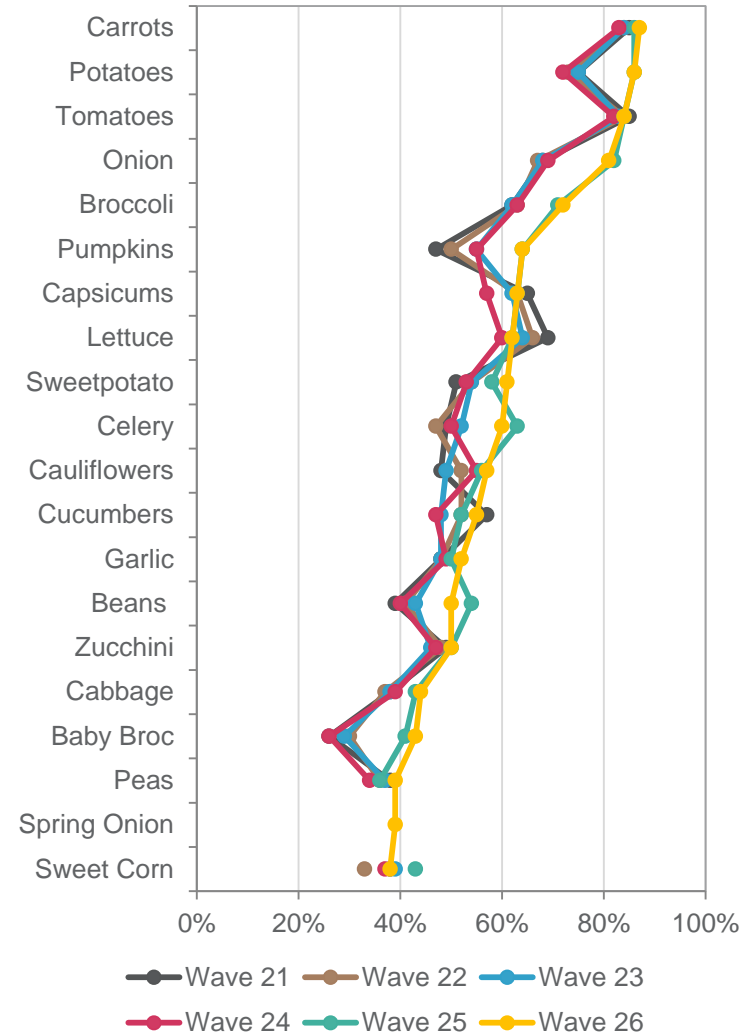
# Wave 26: Overall Vegetable Tracking



# Top 20 Vegetables Purchased Last Month

Carrots, tomatoes and potatoes continue to be the staple vegetables, purchased regularly every month.

Vegetable purchase in June is consistent with past months. The greatest variation in purchase over the last six months has been for beans.



Sample Wave 26 N=1841 (base in higher as Q appears in Screener)  
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 Harvest Project Average is the average of all commodities tracked thus far in this program.

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





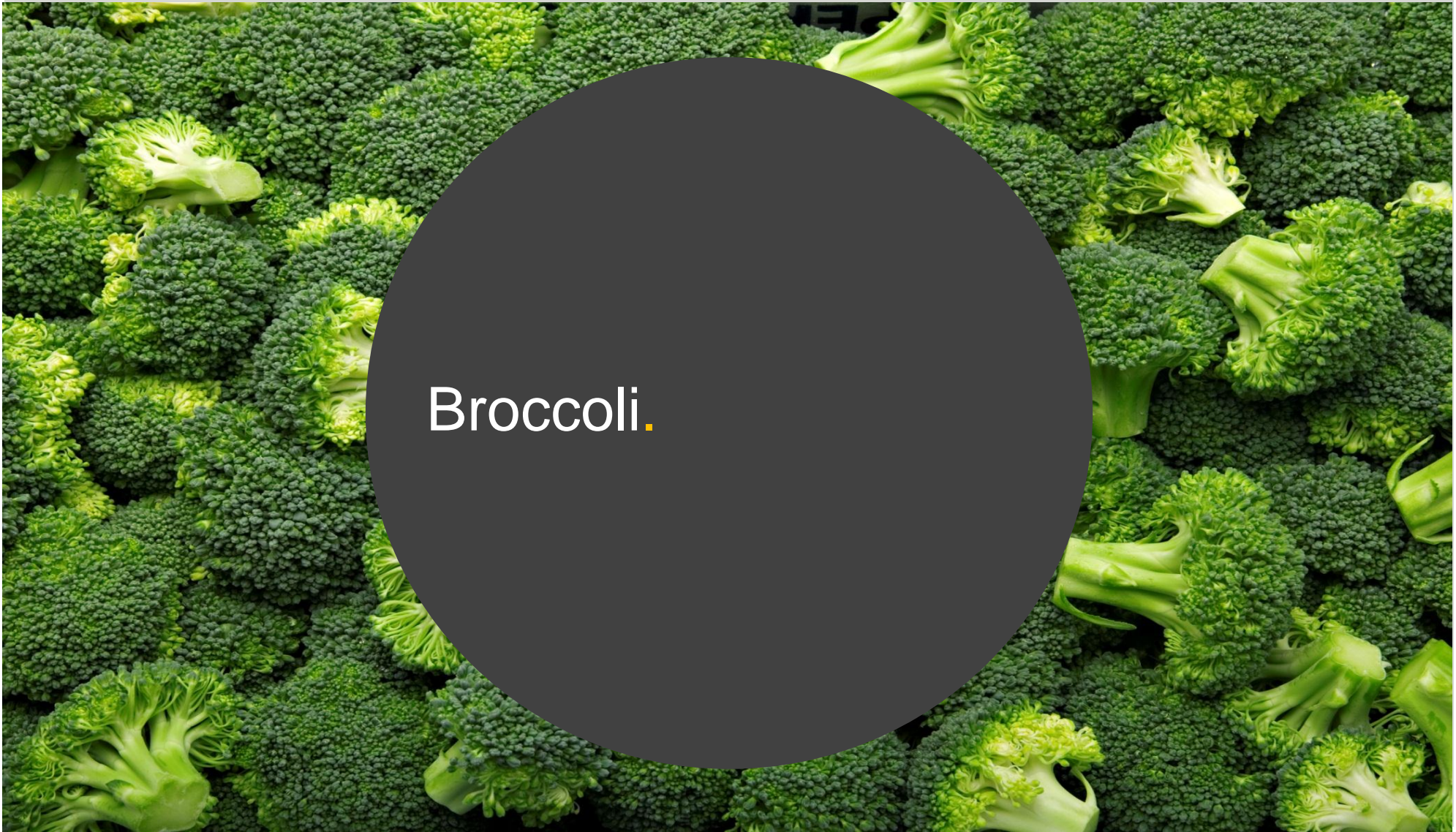
Category health and consumer sentiment remains strong, especially for satisfaction and endorsement compared with the vegetable average.

Both kale and chillies have strong future purchase intent, whilst other commodities appear stable.

	Broccoli	Chillies	Lettuce	Sweet Corn	Green Peas	Kale	Leek	Vegetable Average
Importance	6.3	6.9	6.8	6.7	7.2	6.8	6.2	6.3
Satisfaction	7.1	6.7	7.2	7.0	6.8	6.7	6.9	6.6
Endorsement	7.3	7.2	7.0	7.4	7.4	7.5	6.9	6.9
Interest (New Varieties)	6.0	7.0	6.4	6.7	6.8	7.1	6.2	6.2
Future Purchase								
More	14%	22%	13%	20%	18%	27%	14%	15%
Same	85%	77%	86%	79%	80%	72%	86%	84%
Less	1%	2%	1%	2%	1%	2%	0%	2%

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





Broccoli.





Both consumption and purchase frequency of broccoli have increased this wave.

Purchase is typically from mainstream retailers, with markets being an increasingly popular purchase channel.

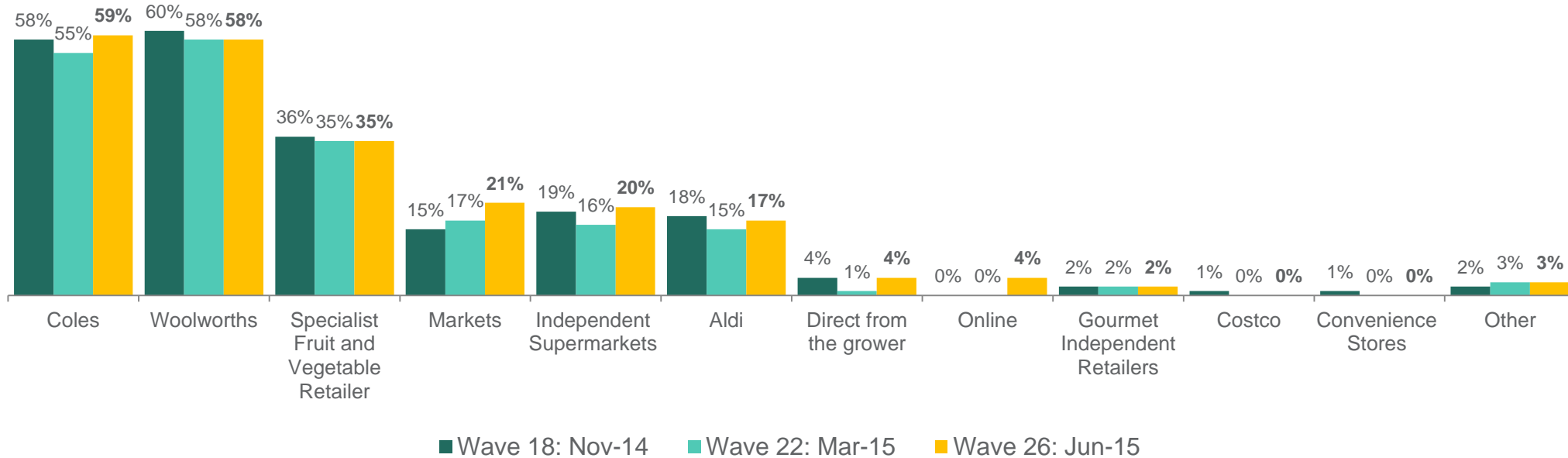


▼ 4.3 times, Wave 18  
▼ 4.2 times, Wave 22



▼ 10.0 times, Wave 18  
▼ 10.1 times, Wave 22

### Purchase Channels



Q1. On average, how often do you purchase <commodity>?  
 Q2. On average, how often do you consume <commodity>?  
 Q5. From which of the following channels do you typically purchase <commodity>?  
 Sample: Wave 18 N=399, Wave 22 N=317, Wave 26 N=309



# Average Spend and Price Sensitivity.



Average weight of purchase

The average consumer typically purchases **800g** of broccoli, which is slightly higher than previous months.

- ▼ 700g, Wave 18
- ▼ 700g, Wave 22



Recalled last spend

The average recalled last spend in June was **\$3.50**, which is relatively consistent with previous waves.

- \$3.50, Wave 18
- ▲ \$3.60, Wave 22



Value for money

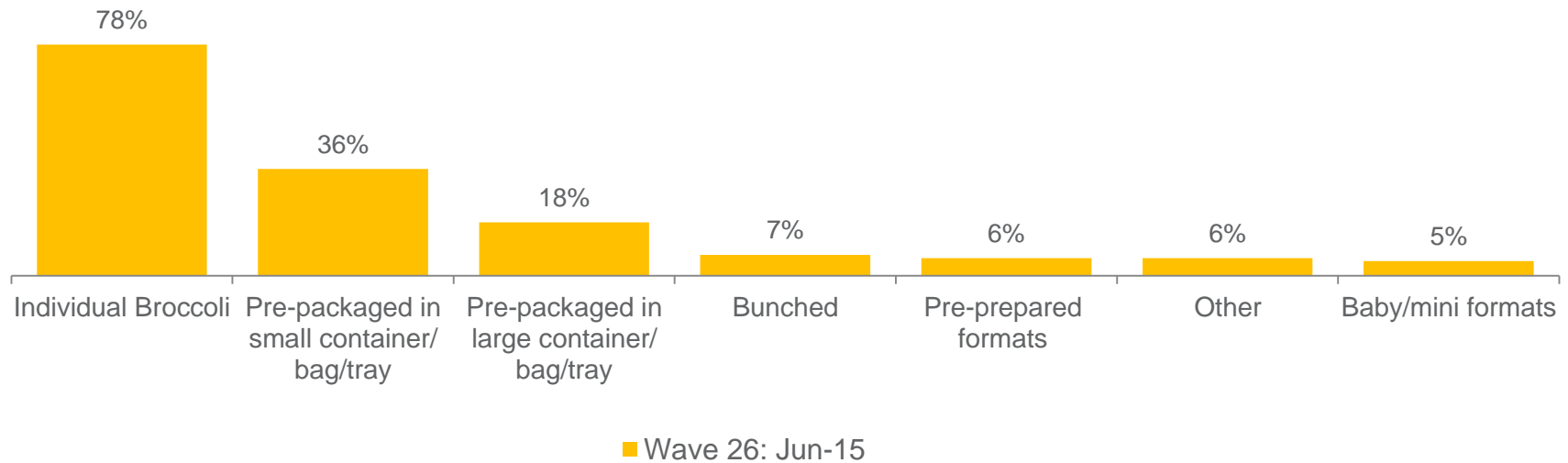
On average, consumers perceived broccoli to be fair value for money (**6.2/10**). There has been slight variability in value perceptions across waves.

- ▲ 6.4/10, Wave 18
- ▼ 6.1/10, Wave 22

Q3. How much <commodity> do you typically purchase when you shop for it?  
 Q3b. To the best of your memory how much did this cost on your most recent typically purchase?  
 Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)  
 Sample: Wave 18 N=399, Wave 22 N=317, Wave 26 N=309



Individual broccoli heads are the main format purchased by consumers. Pre-packaged formats in both small and large containers, bags and trays are also popular options.

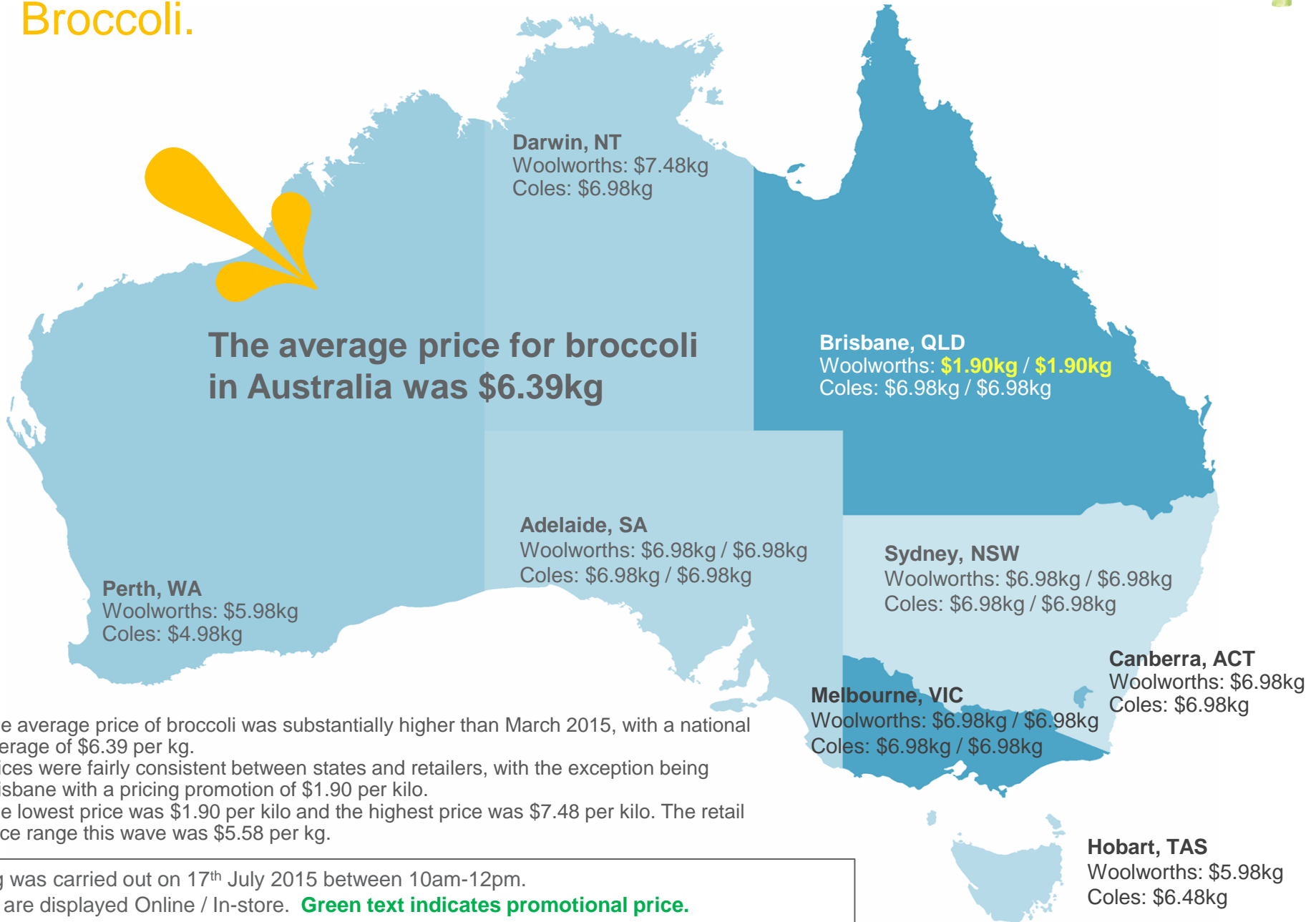


Q4b In what fresh formats do you typically purchase Broccoli?  
Sample: Wave 18 N=399, Wave 22 N=317, Wave 26 N=309

# Online and In-store Commodity Prices.



## Broccoli.



- The average price of broccoli was substantially higher than March 2015, with a national average of \$6.39 per kg.
- Prices were fairly consistent between states and retailers, with the exception being Brisbane with a pricing promotion of \$1.90 per kilo.
- The lowest price was \$1.90 per kilo and the highest price was \$7.48 per kilo. The retail price range this wave was \$5.58 per kg.

Pricing was carried out on 17<sup>th</sup> July 2015 between 10am-12pm.  
Prices are displayed Online / In-store. **Green text indicates promotional price.**

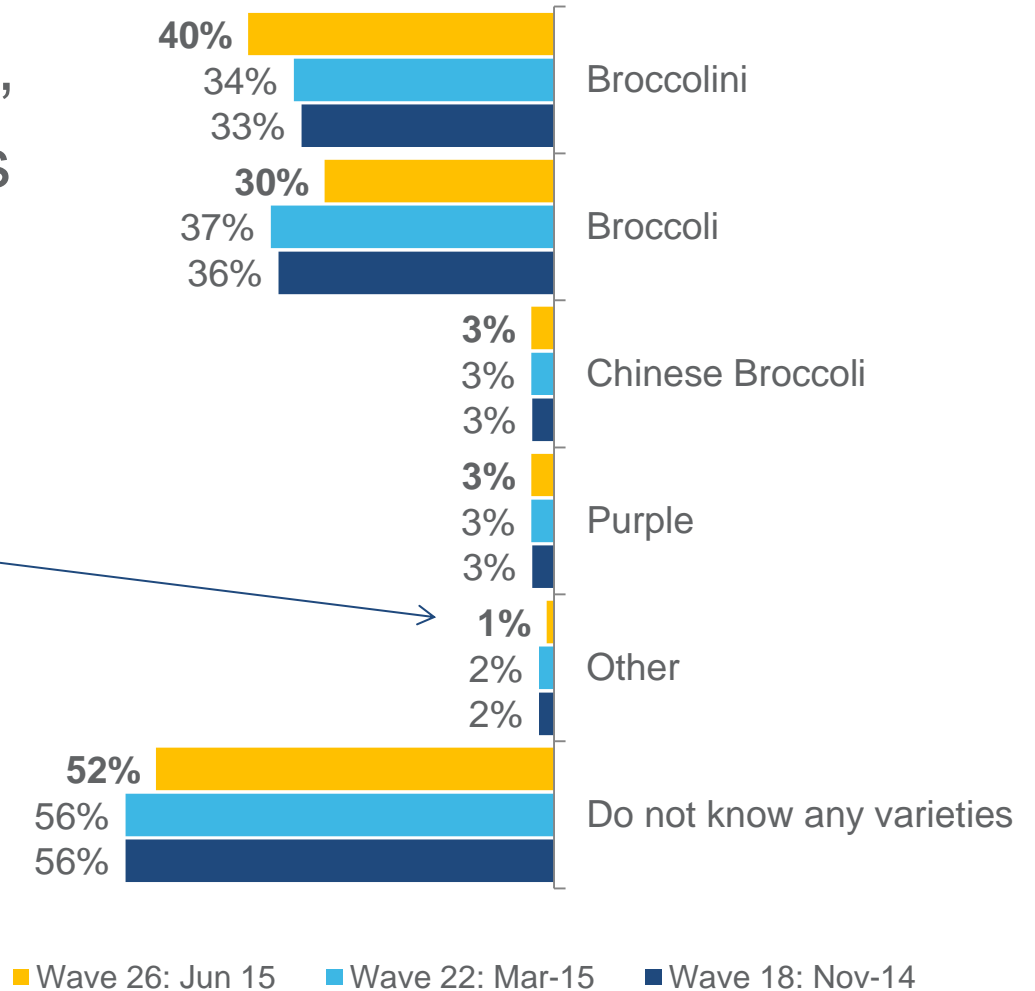




This wave shows greater overall awareness of broccoli types.

Consumers recall 'Broccolini' and generic names, such as 'broccoli', with very few consumers able to name specific types.

*Other varieties recalled are Calabrese, Arcadia and Marathon.*

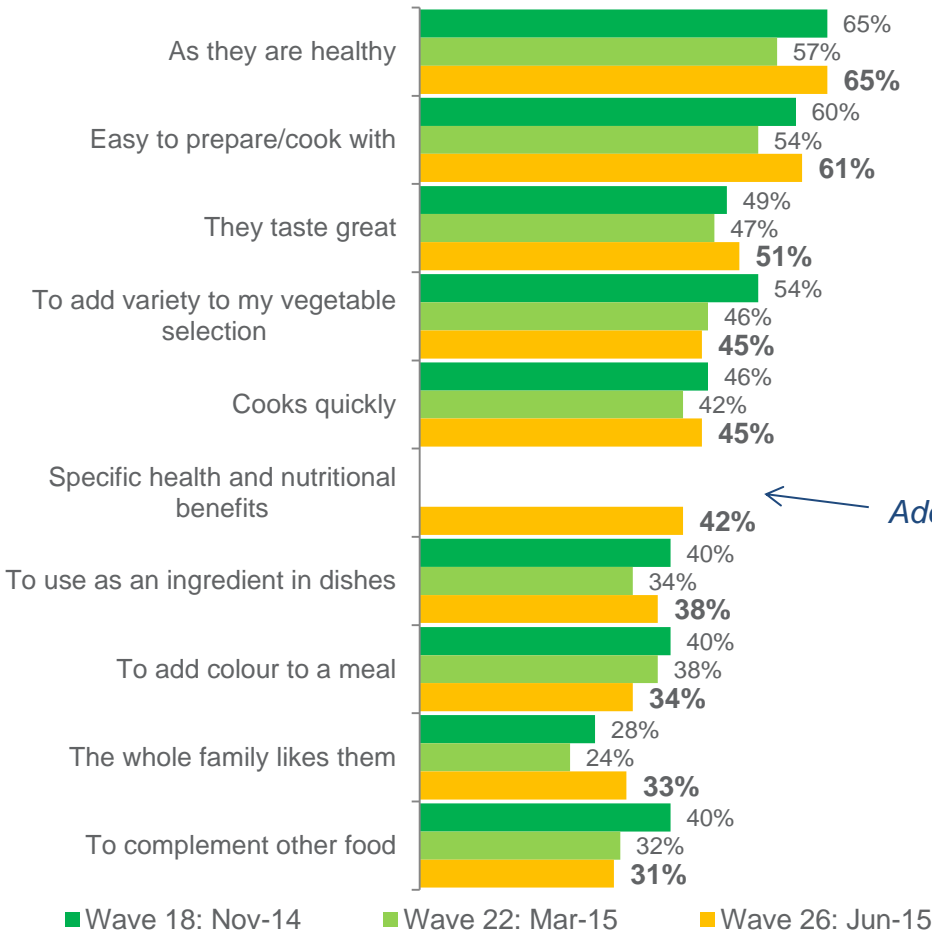




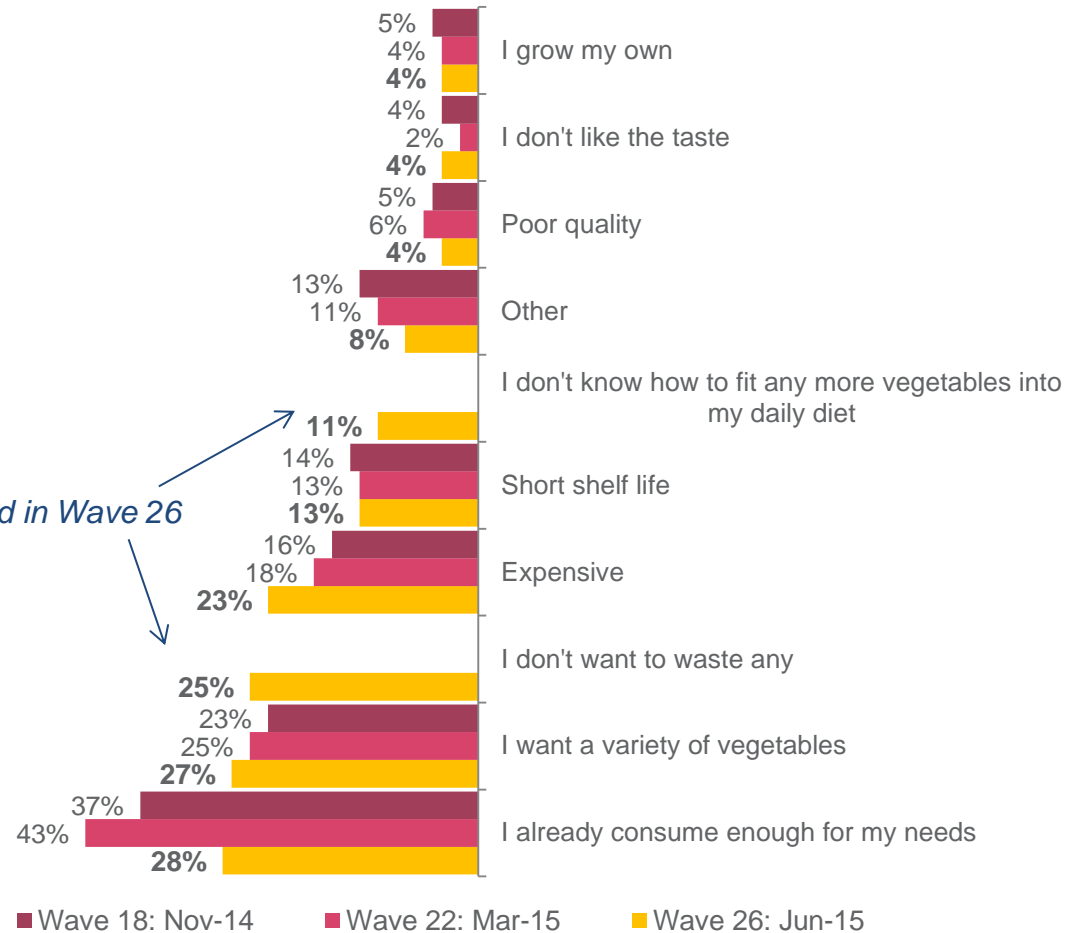
Health and convenience are the main influences on broccoli purchase. Consuming enough for their needs has significantly decreased this wave, however, still remains as the main barrier to purchase.



### Triggers



### Barriers



Added in Wave 26

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 18 N=399, Wave 22 N=317, Wave 26 N=309



Dinner is the main meal occasion for broccoli consumption.

Australian and Chinese cuisines remain popular cuisines cooked by consumers.

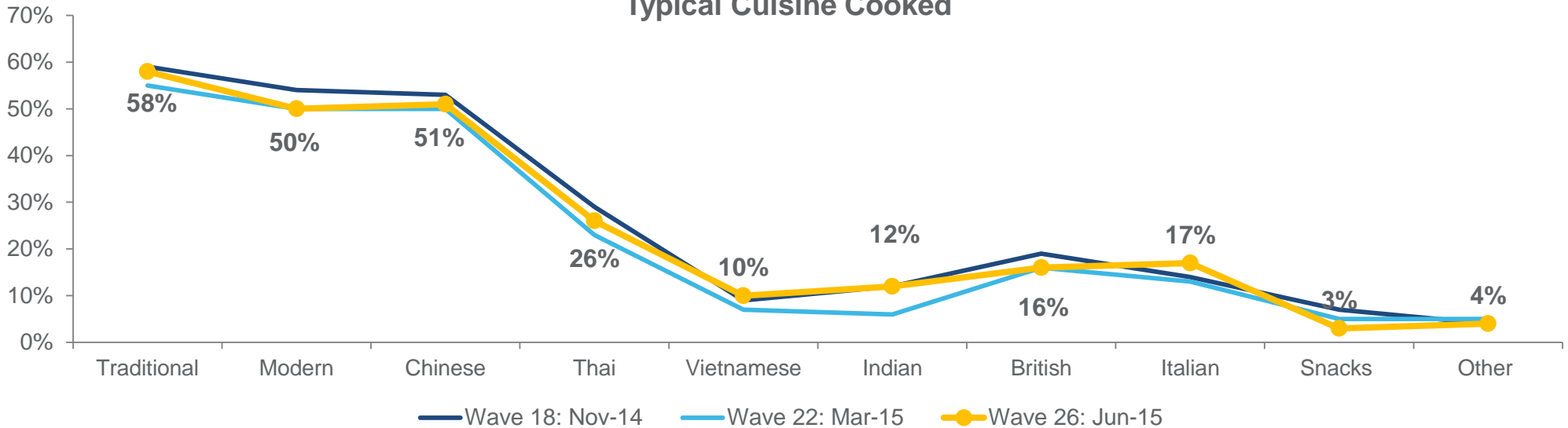


### Top Consumption Occasions

Wave 26

Dinner	82%
Family Meals	61%
Weekday Meals	53%
Weekend Meals	42%
Quick Meals	37%

### Typical Cuisine Cooked

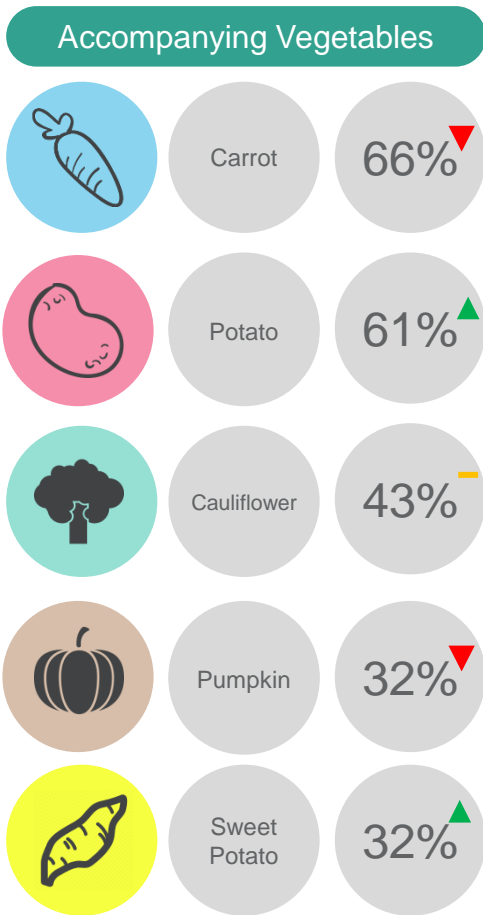


← Australian → ← Asian → ← European → Snacks

Q10. What cuisines do you cook/consume that use <commodity>?  
 Q11. Which of the following occasions do you typically consume/use <commodity>?  
 Sample: Wave 18 N=399, Wave 22 N=317, Wave 26 N=309



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



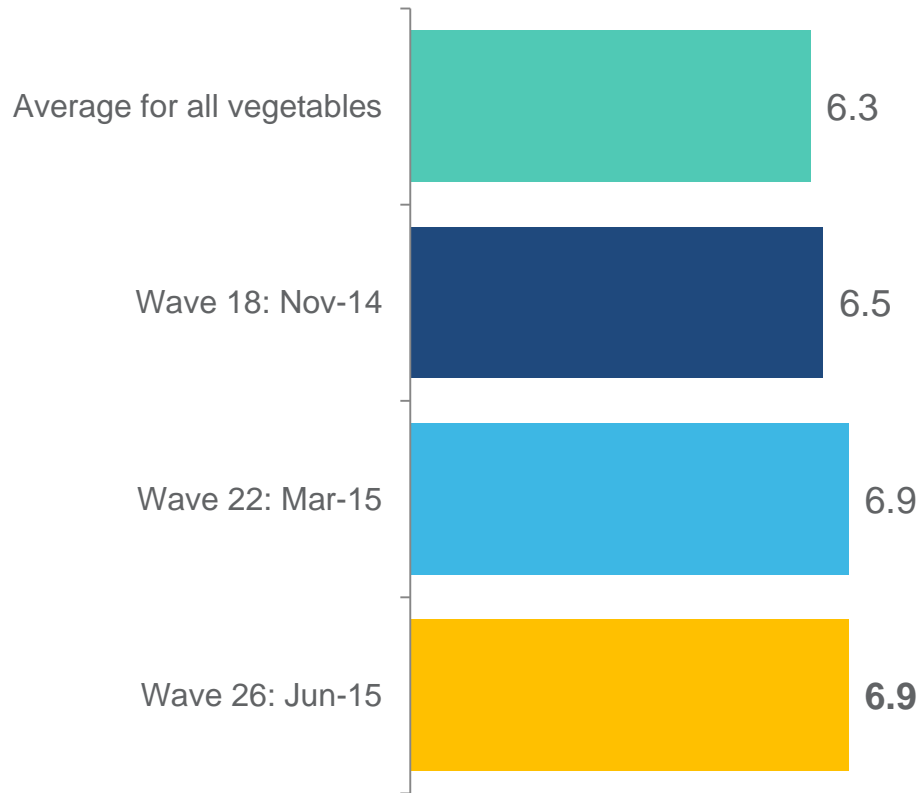
**Top 10 Cooking Styles**

	Wave 18	Wave 22	Wave 26
Steaming	65%	62%	66%
Stir frying	48%	49%	57%
Boiling	33%	36%	39%
Microwave	31%	28%	26%
Soup	13%	12%	16%
Raw	9%	9%	12%
Sautéing	8%	6%	11%
Stewing	7%	9%	10%
Roasting	5%	4%	8%
Deep Frying	2%	0%	8%

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 18 N=399, Wave 22 N=317, Wave 26 N=309



Importance of provenance has remained consistent with the previous wave. Knowing that broccoli is grown in Australia is the most important provenance information for consumers.



Q14. When purchasing <commodity>, how important is Provenance to you?  
Q15. And when purchasing Chillies, how important is that it is grown in Australia?  
Sample: Wave 18 N=399, Wave 22 N=317, Wave 26 N=309



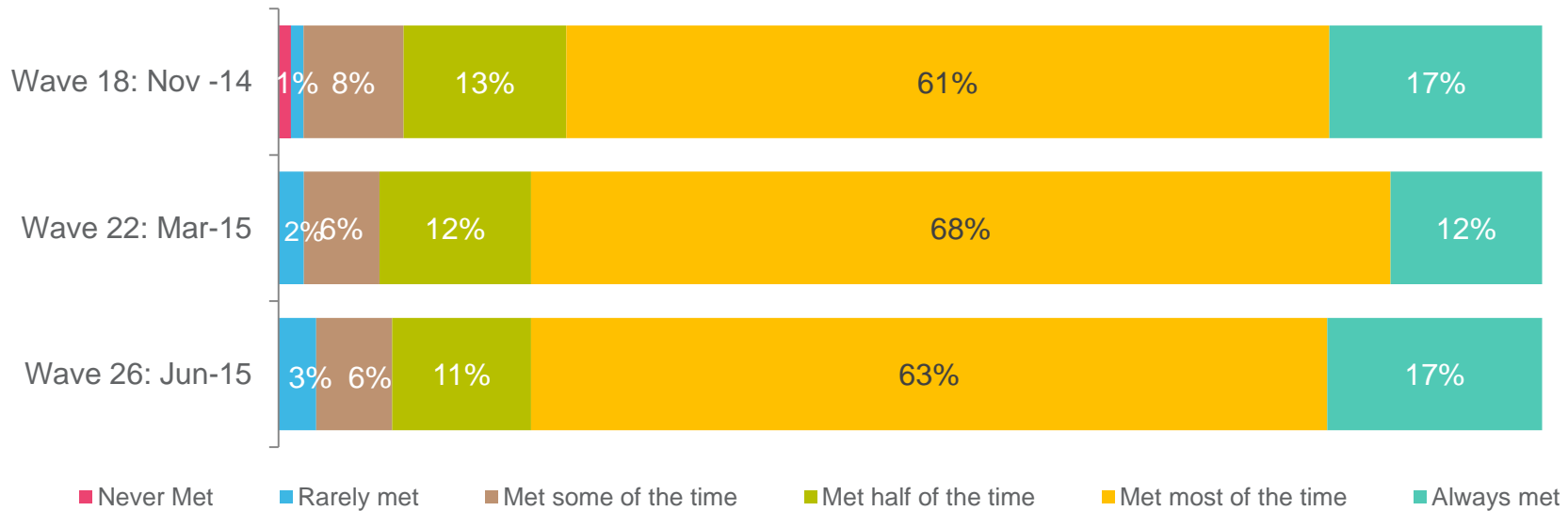


Broccoli is expected to stay fresh for approximately one week, slightly above previous waves. Expectations of freshness are being met most of the time.

Expected to stay fresh for 7.4 days

- ▼ 7.1 days, Wave 18
- ▼ 7.2 days, Wave 22

### 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 18 N=399, Wave 22 N=317, Wave 26 N=309

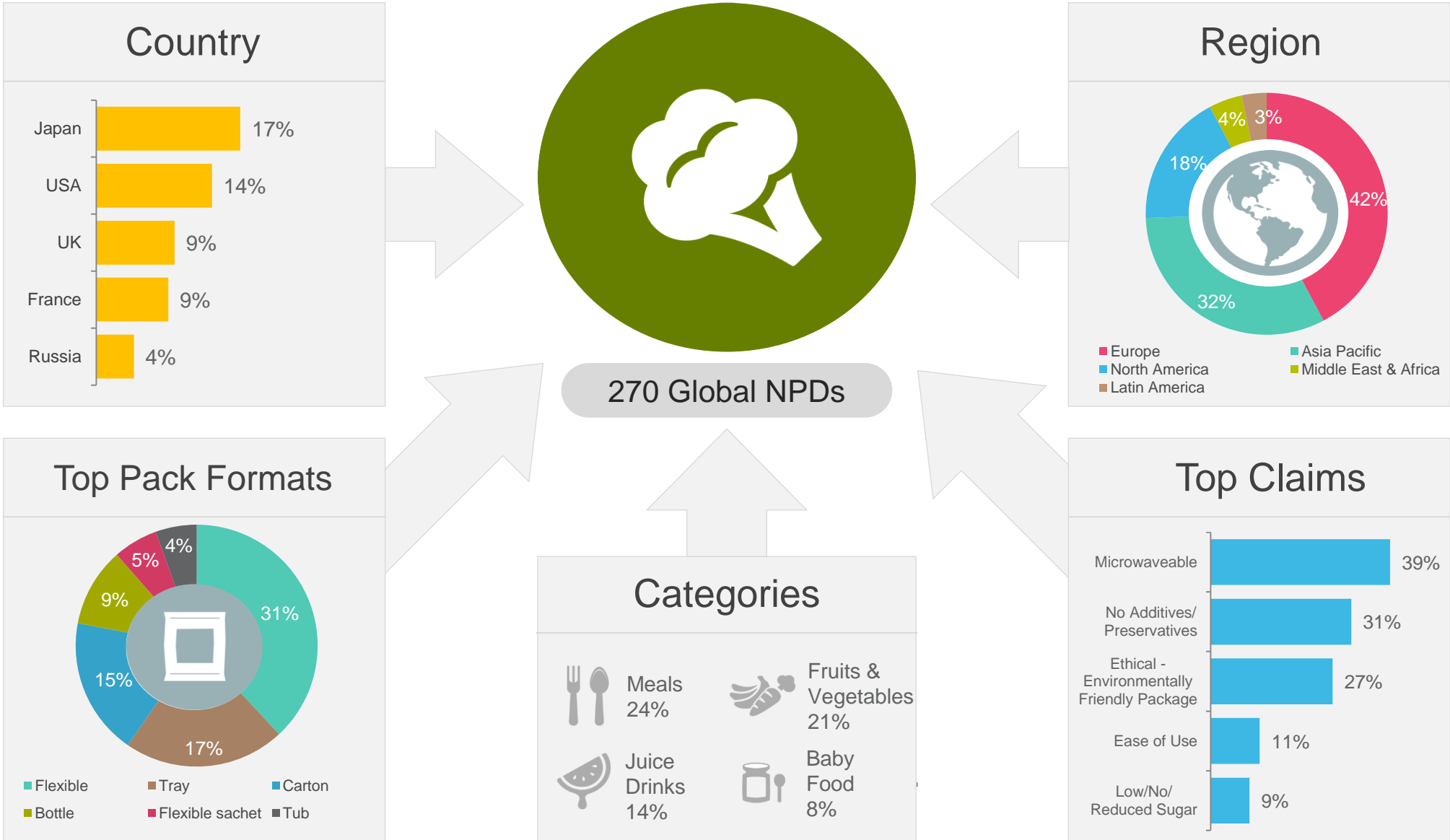


# Broccoli Product Launch Trends.

# Broccoli Global Launches

June – August 2015

There were 270 new broccoli products launched globally over the last 3 months. Top categories for launch were meals and fruit and vegetables. These launches occurred primarily across Europe and Asia Pacific.





## Broccoli Product Launches: Last 3 Months (June – August 2015) Summary

- A total of 270 products containing broccoli as an ingredient were launched globally within the last 3 months, which is up from the previous wave.
- There were 3 products containing broccoli launched in Australia in the past 3 months (see upcoming slide for more detail).
- Europe (42%), Asia Pacific (32%) and North America (18%) remain the top regions for broccoli product launches.
- Flexible pack formats (31%) are the predominant form of packaging for launches in the last 3 months. This is consistent with all previous waves tracked.
- The top categories for launches were meals (24%), fruit and vegetable products (21%), and juice drinks (14%).
- The core claims used for launches centred around convenience and health, with microwaveable being the top claim (39%), no additives or preservatives (31%) and environmentally friendly packaging (27%).
- The most innovative launch found was a broccoli anti-wrinkle cream from Thailand (see upcoming slides for more detail).



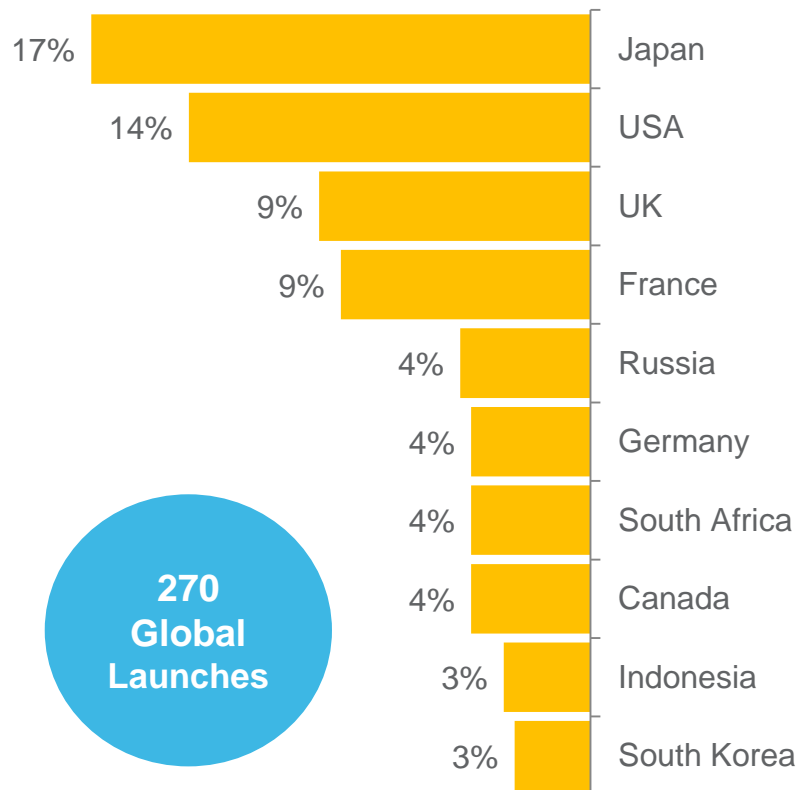
Source: Mintel (2015)





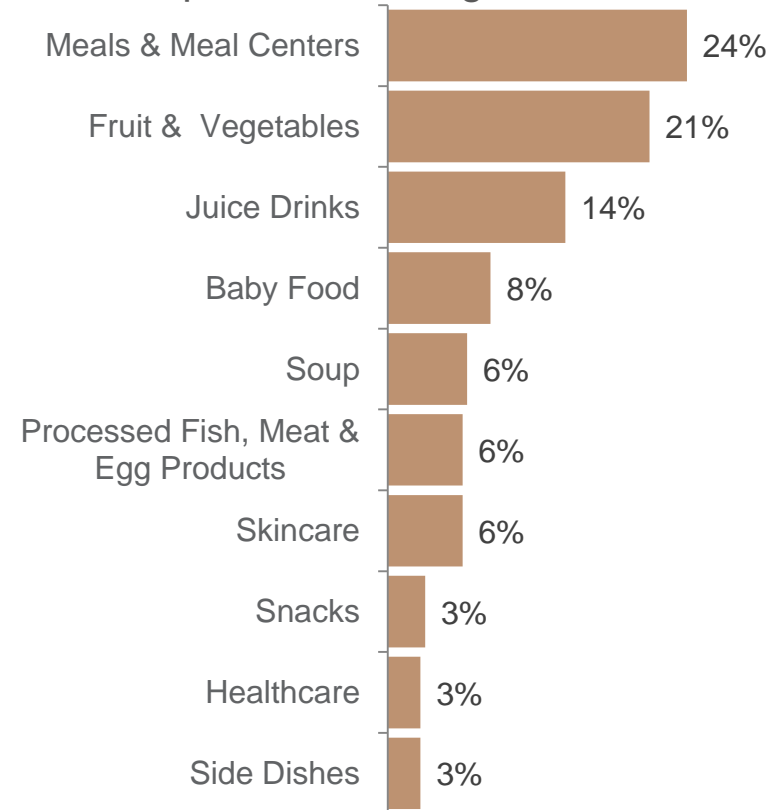
Japan and USA are the dominant countries for broccoli product launches. Meals, fruit & vegetables and juice drinks are the main product categories.

Top Launch Countries



270  
Global  
Launches










Top Launch Categories














Microwaveable is the most used claim on broccoli products, with no additives/preservatives also a popular claim. Flexible packaging is utilised across regions, however cartons appear most popular in Asia Pacific.

### Pack Formats Used

Global		Flexible	31%
		Tray	17%
		Carton	15%
Europe		Flexible	32%
		Carton	14%
		Tray	11%
Asia Pacific		Carton	21%
		Flexible	20%
		Bottle	17%

### Top Claims Used

Global		Microwaveable	39%
		No Additives/Preservatives	31%
		Ethical - Environmentally Friendly Package	27%
Europe		Microwaveable	36%
		No Additives/Preservatives	26%
		Ease of Use	23%
Asia Pacific		No Additives/Preservatives	36%
		Microwaveable	29%
		Ethical - Environmentally Friendly Package	28%

# ➤➤➤ Innovative Broccoli Launches: L3M (June – August 2015)

## R.W. Knudsen Family Simply Nutritious Mega Green Juice Blend (Philippines)

R.W. Knudsen Family Simply Nutritious Mega Green Juice Blend is a juice blend from five juice concentrates with other ingredients. The 100% juice is described as satisfying, delicious blend of sweet, tropical fruits and micro and green algae, spirulina and chlorella. While its colour comes from the green foods, its flavour is created from the all-natural apple, banana, pineapple, peach and mango juices.



**Claims:**  
No Additives/Preservatives, All Natural Product, GMO-Free, Vitamin/Mineral Fortified, Low/No/Reduced Sugar, Antioxidant

## Jamie Oliver Jewelled Rainbow Salad (UK)

Jamie Oliver Jewelled Rainbow Salad is packed with kale, broccoli-spiked quinoa and pomegranate seeds. Inspired by Jamie's comfort food, this vegetarian product also contains vegetables, feta cheese, crunchy seeds and a avocado-blended dressing. It retails in a 198g recyclable pack.



**Claims:**  
Vegetarian, Ethical - Environmentally Friendly Package

## Heavenly Blush Yo! Bananas, Berries and Broccoli Flavoured Yogurt (Indonesia)

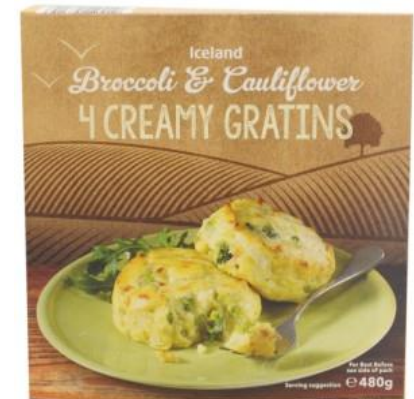
Heavenly Blush Yo! Minuman Yogurt dengan Buah dan Sayur: Pisang, Aneka Beri dan Brokoli (Bananas, Berries and Broccoli Flavoured Yogurt) is a halal certified yogurt with a source of fibre. The product is targeted at children and retails in a 200ml pack featuring the Facebook, Twitter and Instagram logos.



**Claims:**  
Halal, Social Media, Children (5-12)

## Iceland Broccoli & Cauliflower Creamy Gratin (UK)

Iceland Broccoli & Cauliflower Creamy Gratin consist of slices of broccoli and cauliflower in a creamy Emmental cheese sauce. The product is suitable for vegetarians and retails in a recyclable 480g pack containing four units.



**Claims:**  
Vegetarian, Ethical - Environmentally Friendly Package, Microwaveable

# ➤➤➤ Innovative Broccoli Launches: L3M (June – August 2015)

## M&S The Grill Cheddar Cheese Leek & Broccoli Bangers (UK)

M&S The Grill Cheddar Cheese Leek & Broccoli Bangers are suitable for vegetarians. The product can be fried, grilled, oven cooked or on the barbecue, is a source of protein needed to maintain healthy muscles, and retails in a partly recyclable 270g pack.



**Claims:**  
Vegetarian, Ethical - Environmentally Friendly Package

## Jadam Natural Citrus & Vegetables Juice Drink (South Korea)

Jadam Natural Citrus & Vegetables Juice Drink is made with 30% pesticide-free citrus juice and 20% pesticide-free vegetable juice from Jeju island. The product retails in a 1500ml pack, containing 12 x 125ml units.



**Claims:**  
Ethical - Environmentally Friendly Product

## Green Shoot Green Smoothie Kale Broccoli Kiwi (France)

Green Shoot Green Smoothie Kale Broccoli Kiwi (Kale, Broccoli & Kiwi Smoothie) is said to be the perfect way to easily consume green vegetables, by mixing with fruits to give a sweet taste. It is free from added sugars, colourings, preservatives and gluten; and is suitable for vegetarians. The broccoli contained within is said to feature recognised antioxidant properties.



**Claims:**  
No Additives/Preservatives, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Package, Low/No/Reduced Sugar, Ease of Use, Gluten-Free, Social Media, Vegetarian, Antioxidant

## Irresistibles La Pizza Broccoli, Spinach & Kale Thin Crust with a Raised Edge Pizza (Canada)

Irresistibles La Pizza Broccoli, Spinach & Kale Thin Crust with a Raised Edge Pizza is hand stretched and contains no artificial flavours or colours. The product is a source of fibre, vitamin A and calcium, and is high in iron. It retails in a 400g pack, featuring Facebook information.



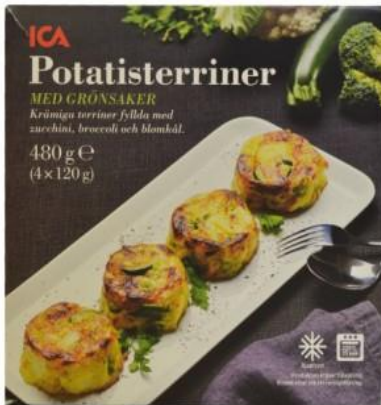
**Claims:**  
No Additives/Preservatives, Social Media



# ➤➤➤ Innovative Broccoli Launches: L3M (June – August 2015)

## ICA Potato Terrines with Vegetables (Sweden)

ICA Potatisterriner med Grönsaker (Potato Terrines with Vegetables) are creamy terrines filled with courgette, broccoli and cauliflower. The product can be oven cooked in 25 minutes and retails in a 480g containing four 120g units.



**Claims:**  
NA

## Seoul Milk Morning Juice Yachae Chaeum Original Vegetable Juice (South Korea)

Seoul Milk Morning Juice Yachae Chaeum Original Vegetable Juice is blended with seven fresh vegetables: carrot, tomato, kale, cabbage, red beet, broccoli and spinach containing 57.9% carrot juice, 4.2% mixed vegetable juice and 17.6% tomato juice. This product has reduced calorie and is said to be highly nutritious. It retails in a 200ml pack.



**Claims:**  
Low/No/Reduced Calorie

## Woolworths Food Cottage Pie & Mixed Veg with Creamy Mash (South Africa)

Woolworths Food Cottage Pie & Mixed Veg with Creamy Mash has been reformulated and now comes with a portion of mixed broccoli peas and carrots. It consists of beef mince, carrots, onions and celery topped with creamy mash potato. This microwavable product is said to be made like at home, and retails in a 350g partially recyclable pack.



**Claims:**  
Ethical - Environmentally Friendly Package, Microwavable

## LadyKin Phtoplan Broccoli Wrinkle Radiance Power Ampoule (Thailand)

LadyKin Phtoplan Broccoli Wrinkle Radiance Power Ampoule features a whitening, anti-wrinkle and anti-fine lines formulation with brassica oleracea italica (broccoli) extract and berry complex to offer the following benefits: strong skin resistance from the internal and external skin stresses; strengthen skin barrier and reduce the stress; and deliver anti-oxidant effect to recover the skin from tiredness.



**Claims:**  
Botanical/Herbal, Whitening, Antioxidant, Anti-Ageing, Protects Against Elements\*, Reduces Fine Lines / Wrinkles



# Australian Broccoli Launches: L3M (June – August 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. This product is said to be great served with porterhouse steak and is free from added artificial colours, flavours and preservatives.



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

## Heinz Steam Fresh Beans, Broccoli & Sugarsnap Peas

Heinz Steam Fresh Beans, Broccoli & Sugarsnap Peas are snap frozen and then sealed in steamer bag to help retain the flavour and goodness without the preparation. Each steam bag contains two serves of vegetable, and can be steamed in the bag in under three minutes. According to the manufacturer, it is good for the heart. The vegetables naturally deliver folate and vitamin C to help the immune system function, and contain dietary fibre. This product is microwaveable, and retails in a pack containing three individually wrapped units.



**Claims:**  
Immune System (Functional), Cardiovascular (Functional), Time/Speed, Microwaveable

## Human+Kind All-in-One Family Remedy Cream

Human+Kind All-in-One Family Remedy Cream is designed to treat many kinds of skin concerns, and is made with a 99.2% natural formulation. The product is said to treat: eczema; psoriasis; itching; minor burns; razor burn; acne; stretch marks; scars; cold and bed sores; nappy rash; sunburn; athlete's foot; insect bites and stings; brittle nails; and hydration for dry, cracked and sensitive skin. It has been dermatologically tested, and retails in 40ml and 100ml packs.



**Claims:**  
Dermatologically Tested, Skin Disorders, For Sensitive Skin, Anti-Acne, Moisturising / Hydrating



# Chillies.



Both purchase and consumption frequency have slightly decreased this wave.

There has been an increase in purchase from Coles, whereas markets have been a less popular purchase channel in comparison to previous waves.

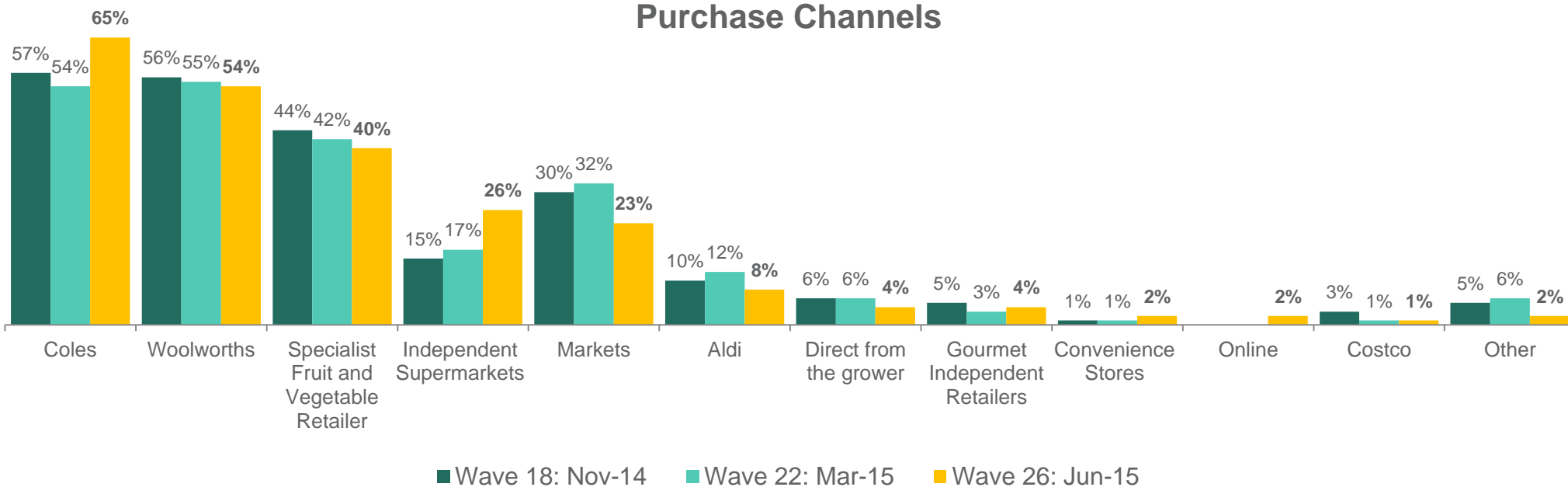


- ▲ 4.0 times, Wave 18
- ▲ 4.0 times, Wave 22



- ▲ 13.0 times, Wave 18
- ▲ 12.4 times, Wave 22

### Purchase Channels



Q1. On average, how often do you purchase <commodity>?  
 Q2. On average, how often do you consume <commodity>?  
 Q5. From which of the following channels do you typically purchase <commodity>?  
 Sample Wave 18 N=215, Wave 22 N=253, Wave 26 N=201





# Average Spend and Price Sensitivity.



Average weight of purchase

The typical consumer purchases **300g** of chillies, consistent with all previous waves.

- 300g, Wave 18
- 300g, Wave 22



Recalled last spend

Recalled last spend on chilli purchase was **\$4.00**, consistent with the past two waves.

- \$4.00, Wave 18
- \$4.00, Wave 22



Value for money

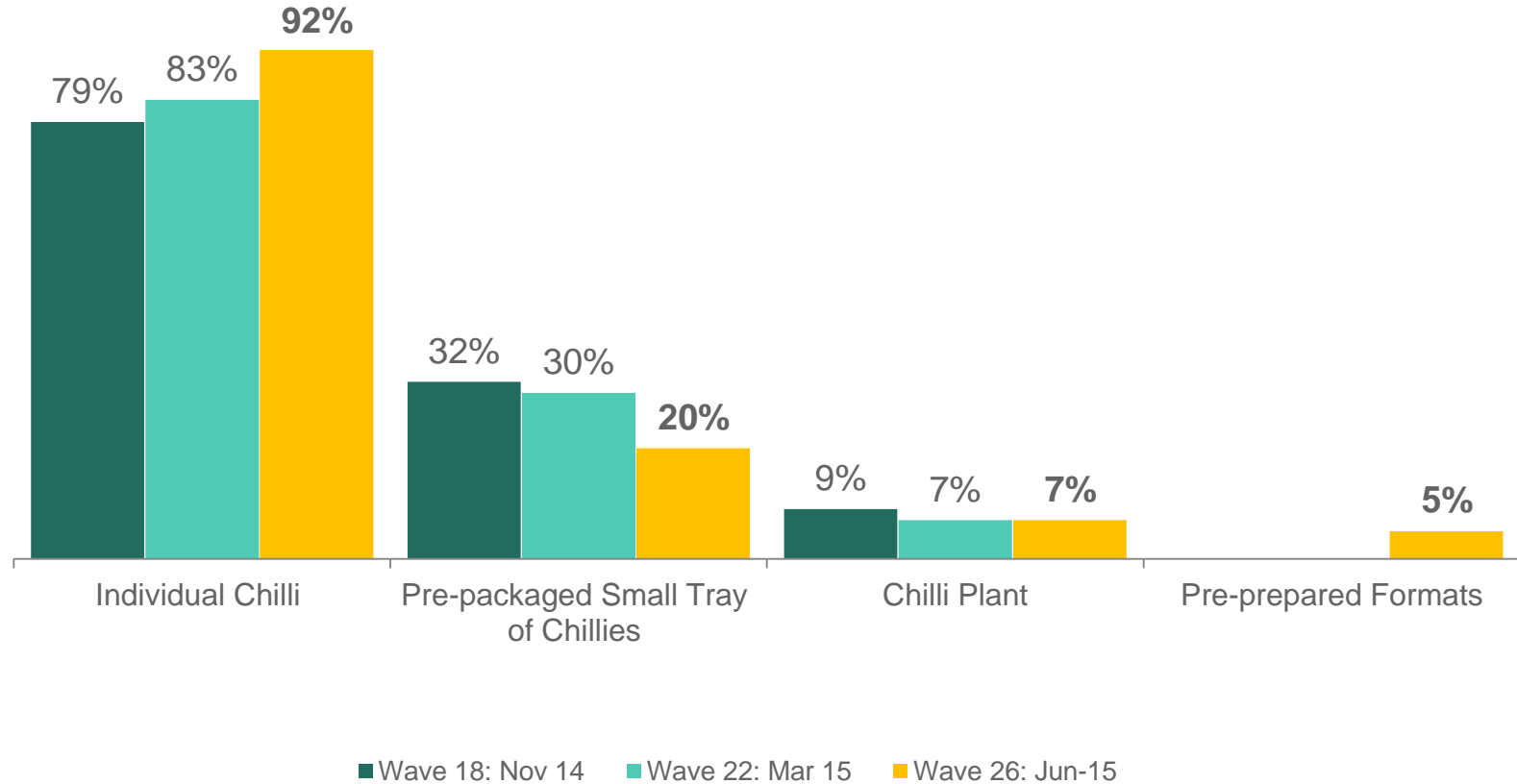
Consumers' perceived value for money was relatively fair (**6.4/10**), slightly higher than past trends.

- ▼ 6.3/10, Wave 18
- ▼ 6.2/10, Wave 22

Q3. How much <commodity> do you typically purchase when you shop for it?  
 Q3b. To the best of your memory how much did this cost on your most recent typically purchase?  
 Q4. Please indicate how Poor to Good Value you think this product is? 0-10 scale  
 Sample Wave 18 N=215, Wave 22 N=253, Wave 26 N=201



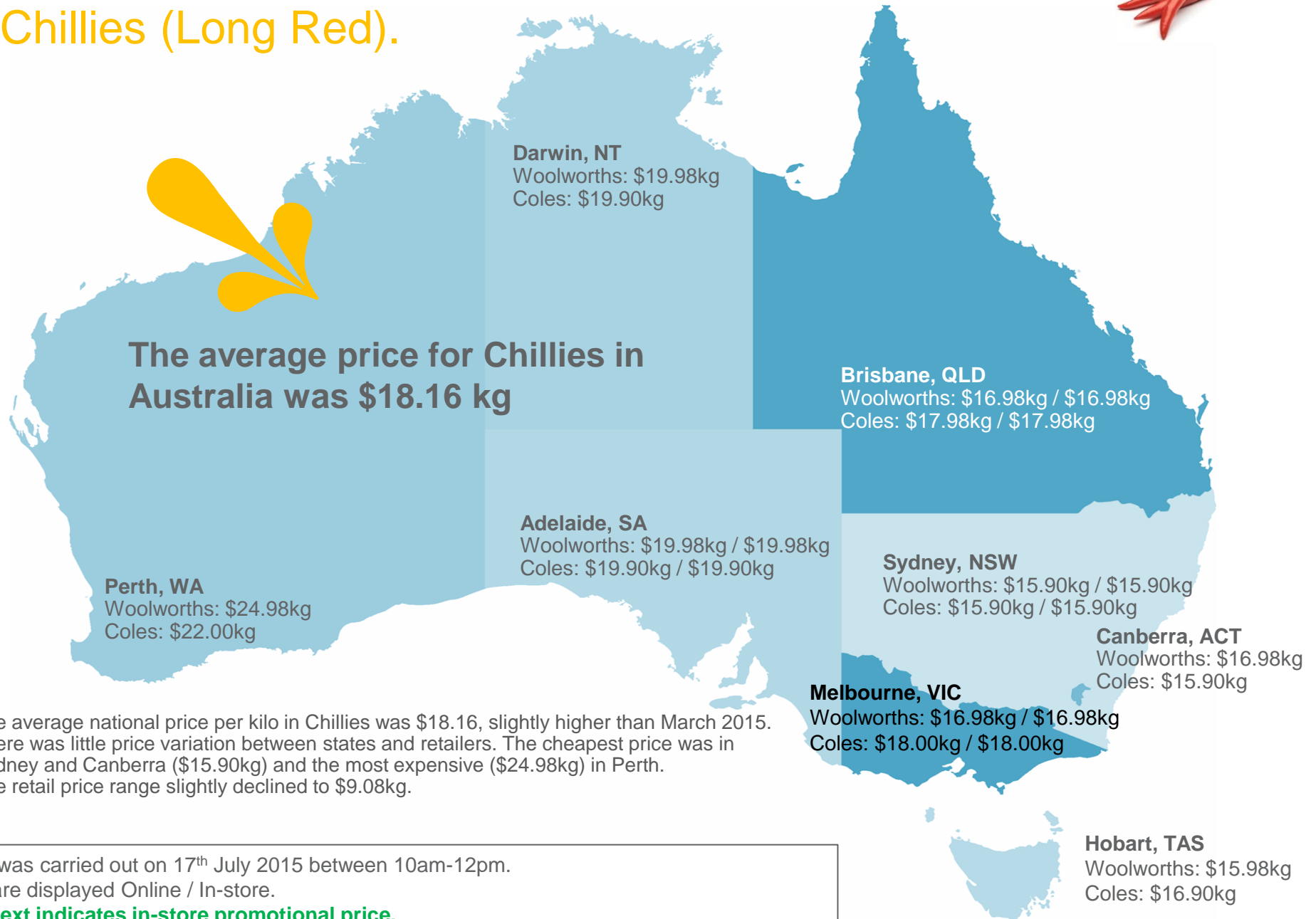
# Individual chillies are the main format purchased, followed by pre-packaged small trays.



Q4b In what fresh formats do you typically purchase Chillies?  
Sample Wave 18 N=215, Wave 22 N=253, Wave 26 N=201

# Online and In-store Commodity Prices.

## Chillies (Long Red).



- The average national price per kilo in Chillies was \$18.16, slightly higher than March 2015.
- There was little price variation between states and retailers. The cheapest price was in Sydney and Canberra (\$15.90kg) and the most expensive (\$24.98kg) in Perth.
- The retail price range slightly declined to \$9.08kg.

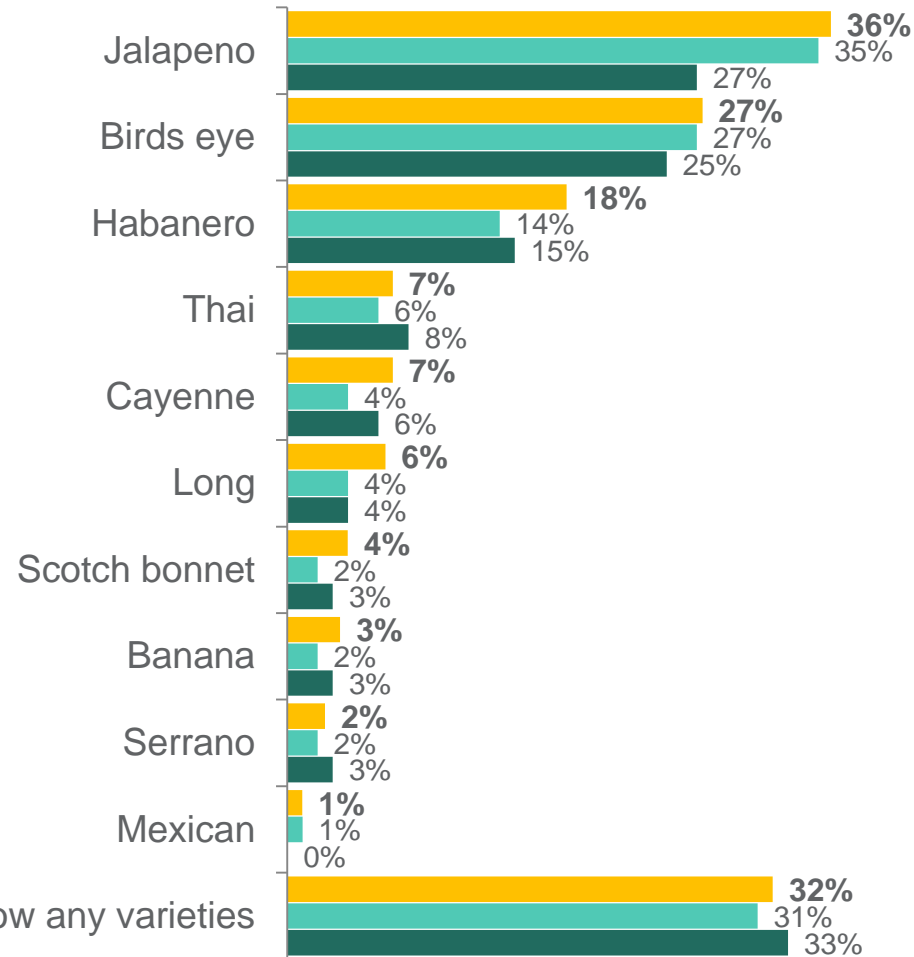
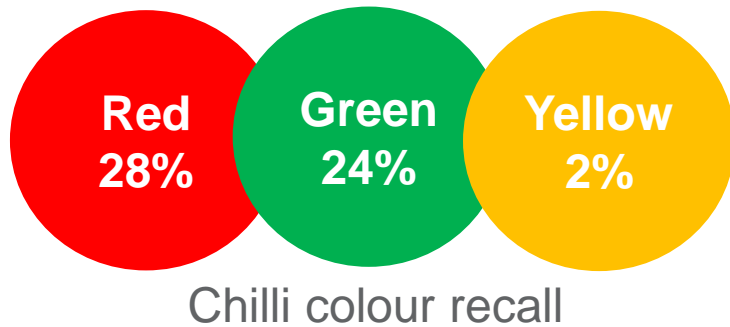
Pricing was carried out on 17<sup>th</sup> July 2015 between 10am-12pm.  
Prices are displayed Online / In-store.

**Green text indicates in-store promotional price.**



There has been a gradual increase in awareness of chilli types.

Jalapeno and Birds eye remain the most recalled types. There has been a consistent increase in Jalapeno awareness over past waves.



■ Wave 26: Jun-15   ■ Wave 22: Mar 15   ■ Wave 18: Nov 14

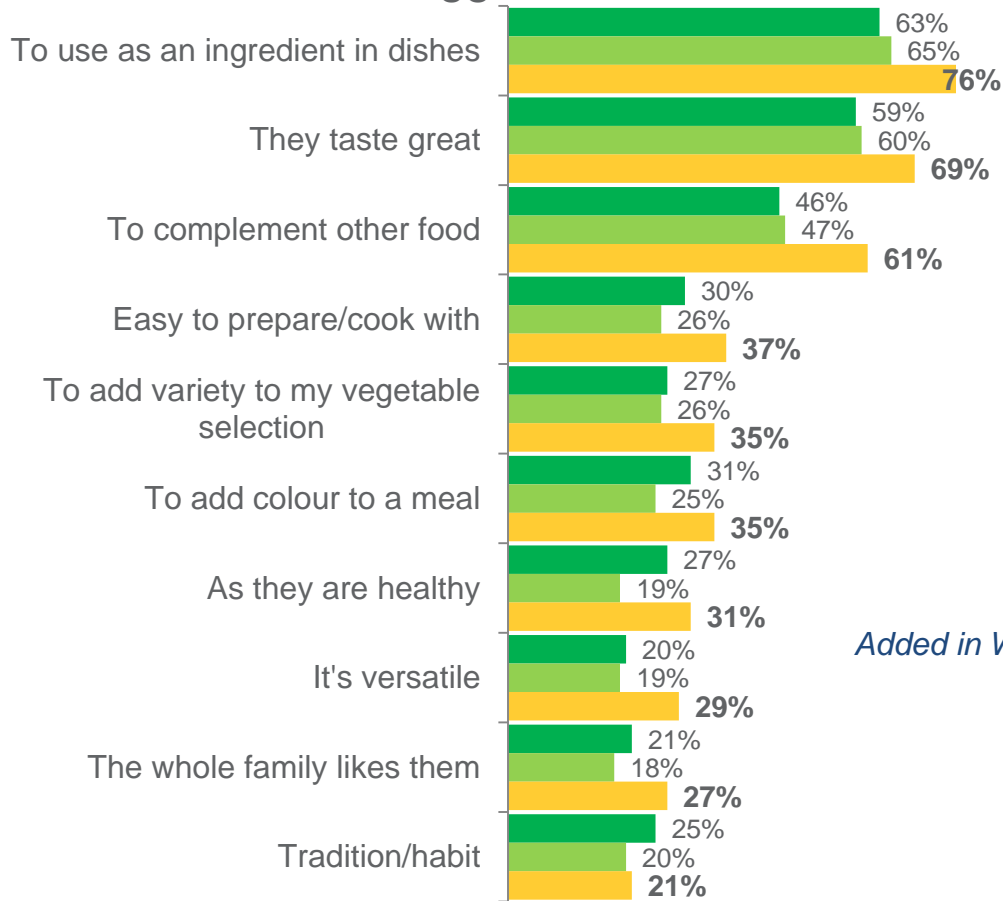
Q6a. What types/varieties of <commodity> are you aware of? (unprompted)  
Sample Wave 18 N=215, Wave 22 N=253, Wave 26 N=201



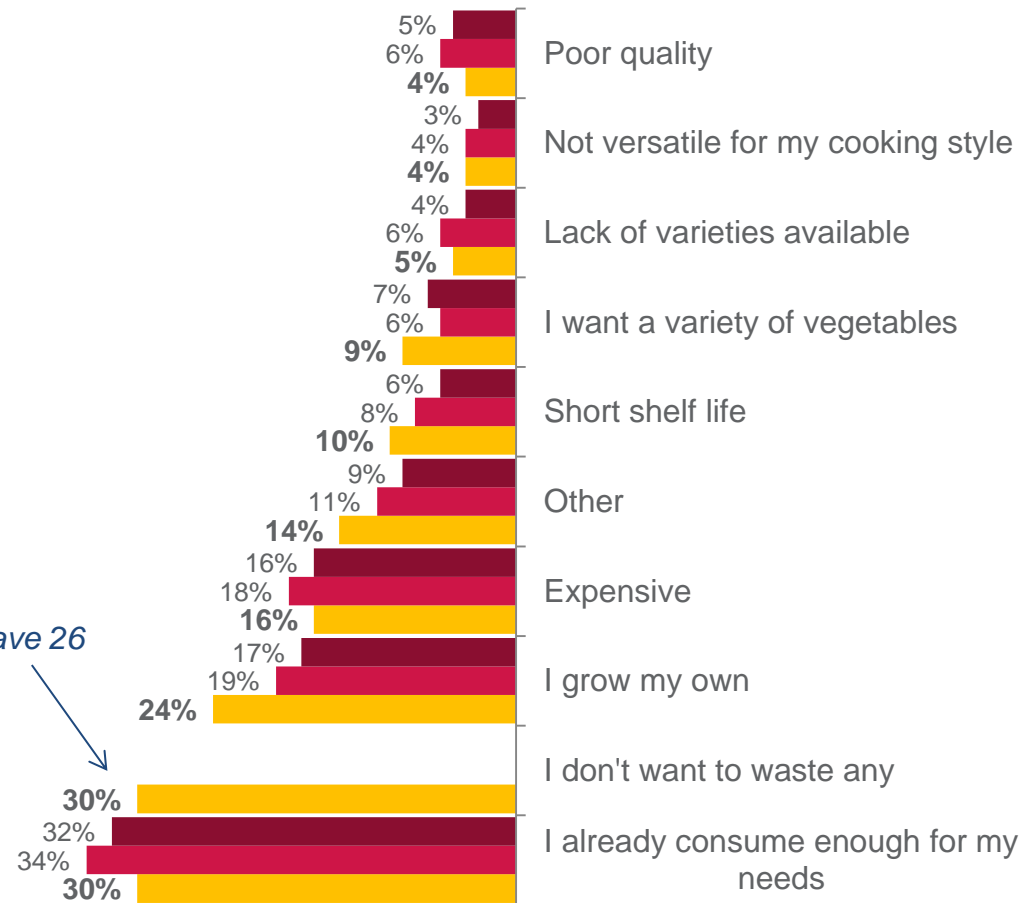
Three key triggers are driving chilli purchase: using as an ingredient, taste and complementing other food. Consuming enough for their needs remains the main barrier to purchase. There has been a consistent increase in consumers growing their own chillies as a barrier to purchase.



### Triggers



### Barriers



Added in Wave 26

■ Wave 18: Nov-14 ■ Wave 22: Mar-15 ■ Wave 26: Jun-15 ■ Wave 18: Nov -14 ■ Wave 22: Mar-15 ■ Wave 26: Jun-15

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 18 N=215, Wave 22 N=253, Wave 26 N=201





Asian and Mexican cuisine are popular cooking styles with chilli.

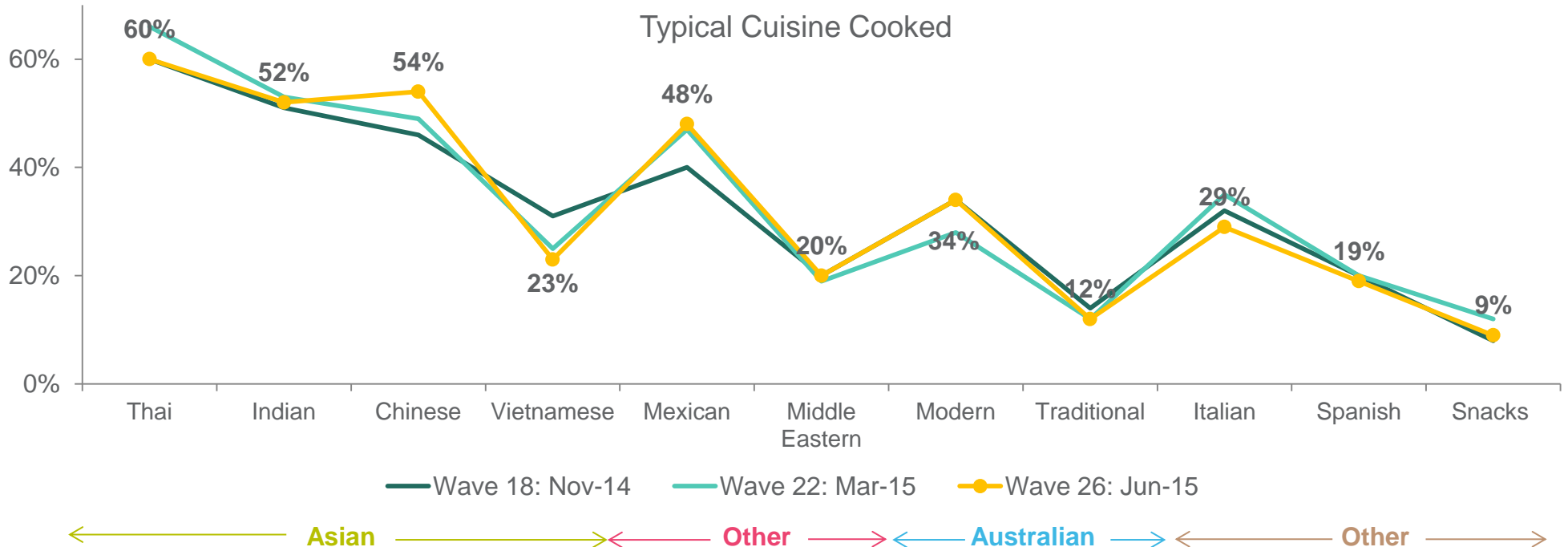
Consumers are typically eating chillies for dinner meals.



### Top Consumption Occasions

Wave 26

Dinner	79%
Family Meals	68%
Weekday Meals	54%
Weekend Meals	52%
Quick Meals	50%



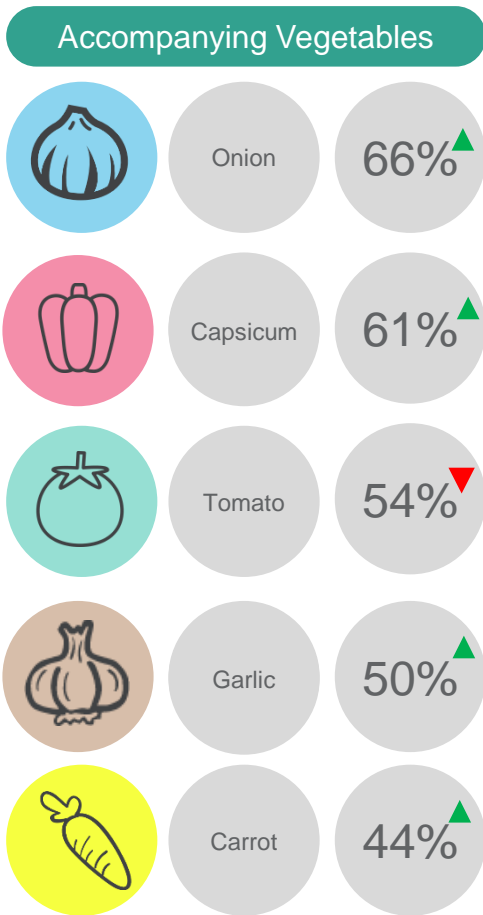
Q10. What cuisines do you cook/consume that use <commodity> ?  
 Q11. Which of the following occasions do you typically consume/use <commodity> ?  
 Sample Wave 18 N=215, Wave 22 N=253, Wave 26 N=201



Capsicums are increasingly likely to be served with chillies, as well as onions.



Consumers prefer to stir-fry chillies, whilst frying and slow cooking are also common cooking styles.



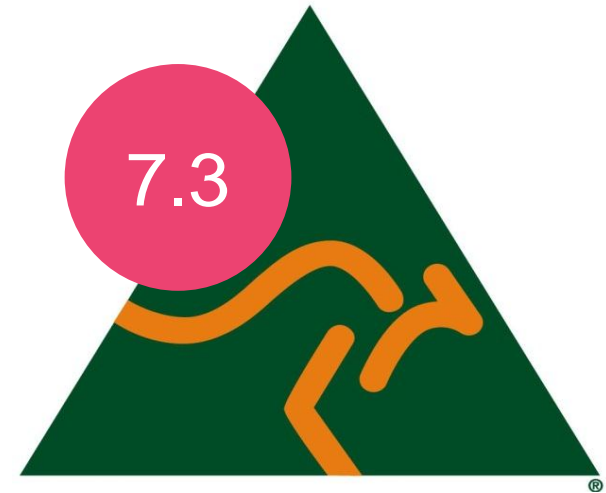
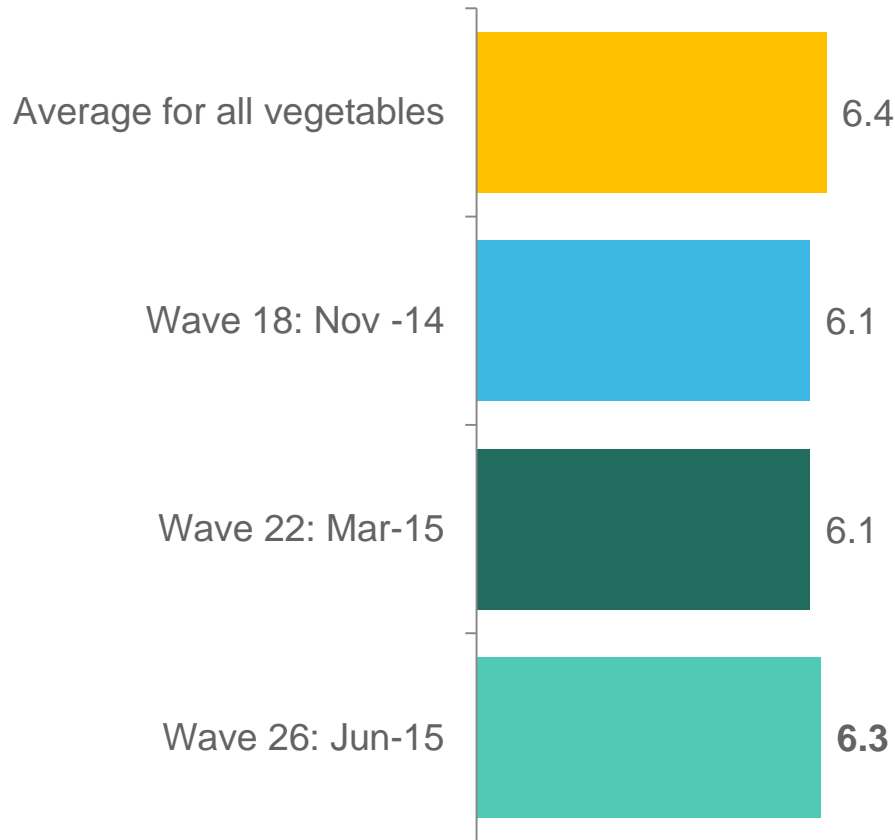
**Top 10 Cooking Styles**

	Wave 26
Stir frying	74%
Frying	44%
Slow cooking	38%
Soup	36%
Sautéing	33%
Raw	31%
Roasting	23%
Baking	14%
Grilling	11%
Boiling	8%

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 18 N=215, Wave 22 N=253, Wave 26 N=201



Importance of provenance has increased this wave, but is still lower than the Harvest project average. This may be because consumers only purchase a small amount of chillies per shop, and buy less frequently compared with other vegetables.



Q14. When purchasing <commodity>, how important is Provenance to you?  
Q15. And when purchasing Chillies, how important is that it is grown in Australia?  
Sample Wave 18 N=215, Wave 22 N=253, Wave 26 N=201



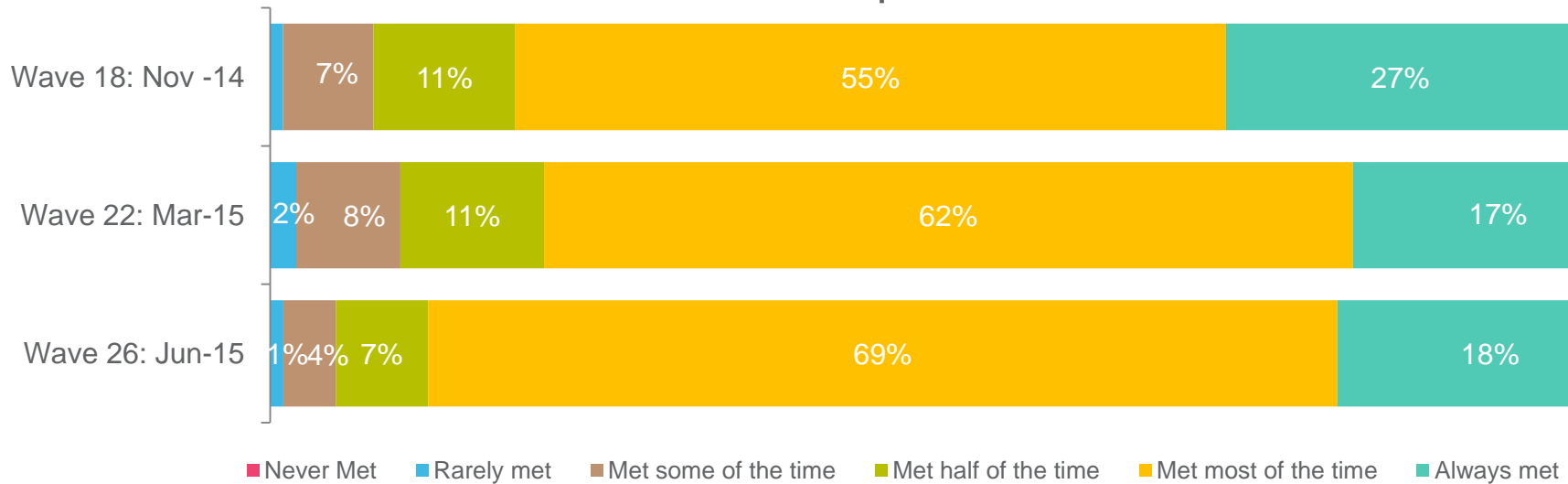
Expectations of freshness has improved this month and is met most of the time.

However, the expected shelf life of chillies remains over 10 days, which is quite substantial comparative to other commodities.

Expected to stay fresh for 10.9 days

- ▲ 11.7 days, Wave 18
- ▲ 11.4 days, Wave 22

### 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 18 N=215, Wave 22 N=253, Wave 26 N=201

A close-up photograph of numerous bright red, glossy chillies with green stems, filling the entire background. A large, semi-transparent dark grey circle is centered over the image, containing the title text.

# Chillies Product Launch Trends.



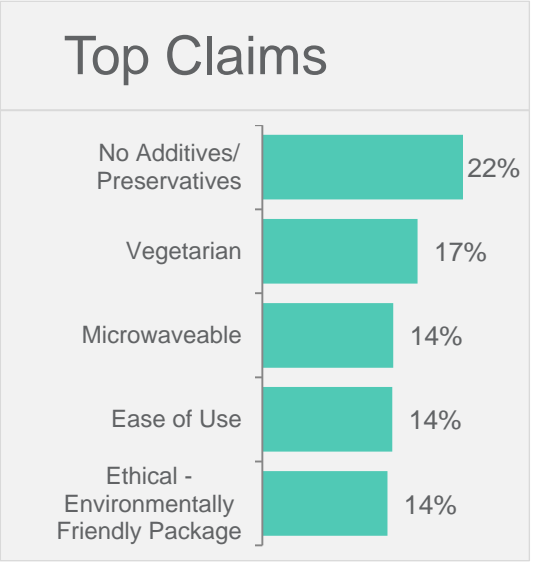
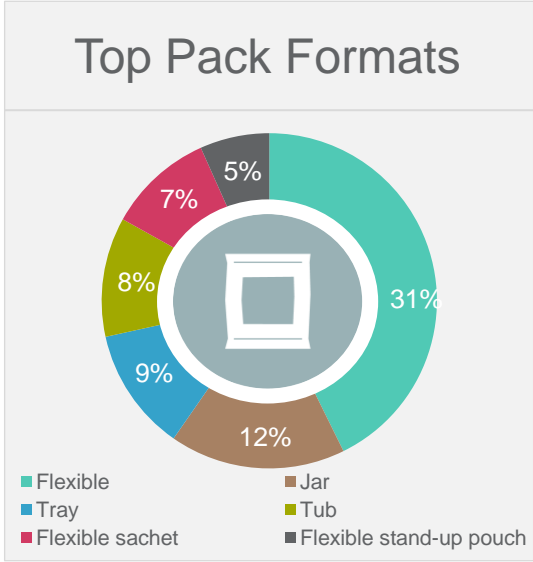
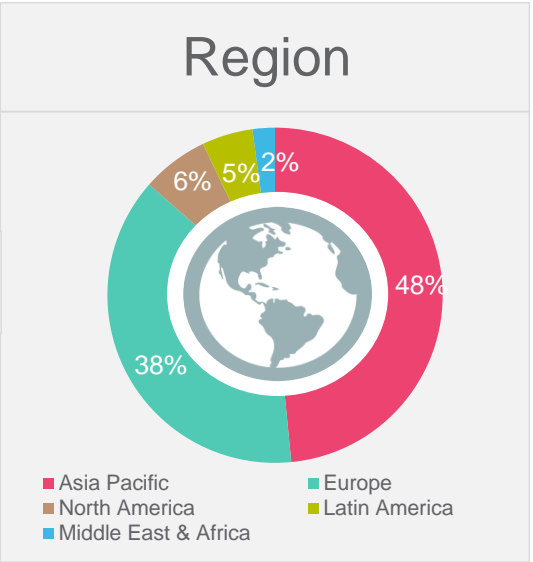
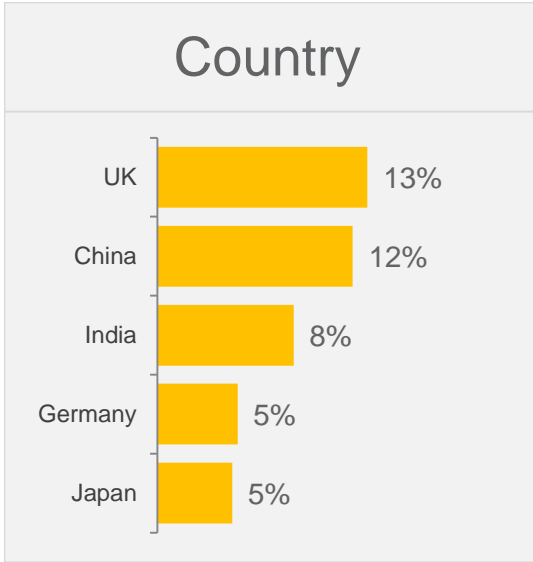
# Chilli Global Launches

## June – August 2015

There were 2774 new products launched in the last 3 months that contained chilli as an ingredient. The majority of these launches were in the Asia Pacific and Europe regions. The top product launches categories were sauces & seasonings and seasonings and meals.



2774 Global NPDs





## Chilli Product Launches: Last 3 Months (June – August 2015) Summary

- A total of 2774 products that contained chilli as an ingredient have been launched globally in the last 3 months, more than double the number of launches in the previous wave (1067).
- There were 67 chilli products launched in Australia – substantially greater than in previous waves.
- The two main regions for launches are Asia Pacific (48%) and Europe (38%), with the former overtaking the latter as the main region for launches.
- Flexible packaging (31%) and jars (12%) are the main formats used for launches over the past three months.
- Top categories for launches are sauces and seasoning (35%) and meals (21%).
- The key claims used are no additives/preservatives (22%) and vegetarian (17%).
- The most innovative products are a chocolate and chilli sugar from New Zealand, and a chilli oil spray from Poland (see upcoming slides for more details).

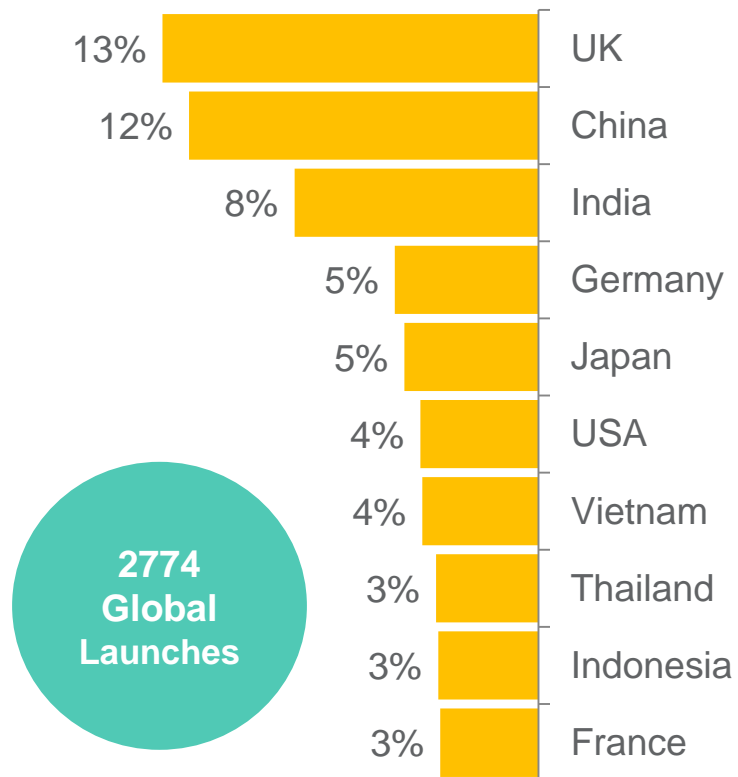


Source: Mintel (2015)

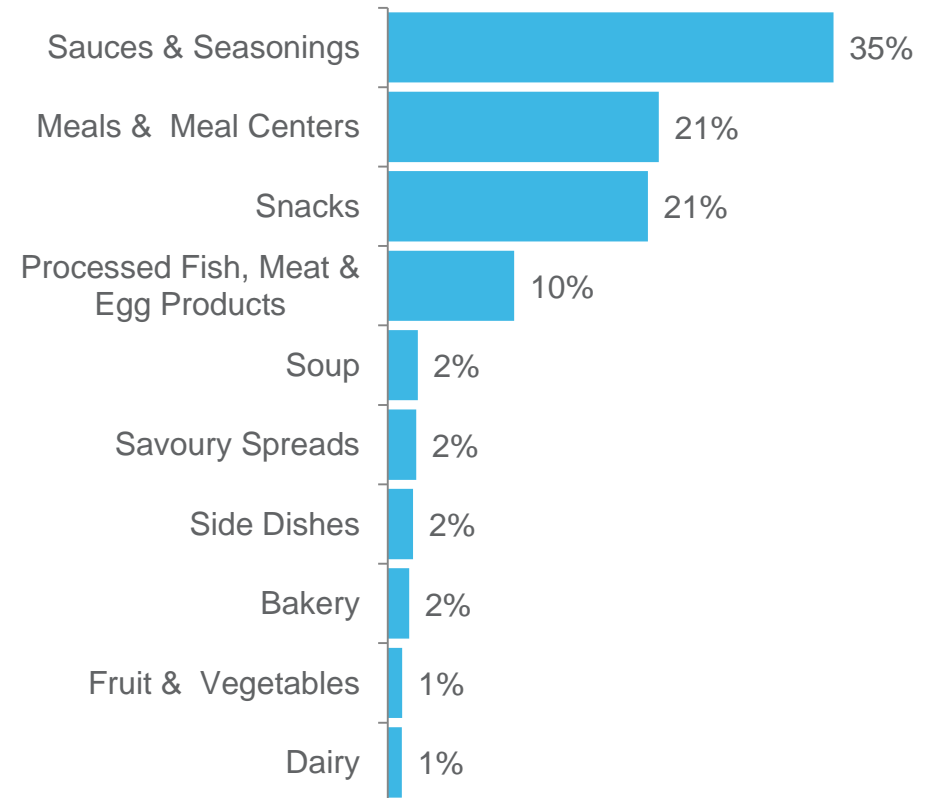
»»»→ The UK and China have had the greatest number of launches over the past three months.

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

Top Launch Countries












Top Launch Categories














No additives & preservatives is the key claim used on products containing chilli. Flexible formats are the main type of packaging used, being the top format in each region.

### Pack Formats Used

Global		Flexible	31%
		Jar	12%
		Tray	9%
Asia Pacific		Flexible	36%
		Flexible Sachet	14%
		Jar	12%
Europe		Flexible	24%
		Tray	21%
		Jar	12%

### Top Claims Used

Global		No Additives/Preservatives	22%
		Vegetarian	17%
		Microwaveable	14%
Asia Pacific		No Additives/Preservatives	23%
		Vegetarian	20%
		Halal	19%
Europe		Ethical - Environmentally Friendly Package	26%
		No Additives/Preservatives	22%
		Vegetarian	19%



# Innovative Chilli Launches: L3M (June – August 2015)

## Cracker Barrel Habanero Heat Shredded Natural Cheese (Canada)

Cracker Barrel Habanero Heat Shredded Natural Cheese comprises Monterey Jack, cheddar, and pizza mozzarella cheeses. It contains 28% milk fat and 42% moisture. This product with habanero and jalapeno peppers is a good source of calcium, and retails in a 320g duo zip pack featuring a recipe suggestion.



**Claims:**  
Convenient Packaging, Low/No/Reduced Fat, Slimming

## AlaCena Sanka Hot Pepper Sauce (Peru)

AlaCena Sanka Crema de Aji (Sanka Hot Pepper Sauce) is formulated with carefully selected yellow peppers and chillis. The product retails in a 400g pack.



**Claims:**  
NA

## Ayam Brand 100% Natural Curry Kit with Laksa Curry Paste and Coconut Milk (Singapore)

Ayam Brand 100% Natural Curry Kit with Laksa Curry Paste and Coconut Milk comprises Laksa paste and coconut milk. The curry kit just requires the addition of prawns, fish cake, tau pork, bean sprouts and noodles for preparation. The halal certified laksa paste features a mild spice level, is 25% lower in sodium compared to regular recipe mixes and is described as so easy.



**Claims:**  
Ease of Use, All Natural Product, Social Media, Halal, Low/No/Reduced Sodium, Event Merchandising

## Amaizin Organic Chilli Corn Chips (Singapore)

Amaizin Organic Chilli Corn Chips are made from an original Mexican recipe, seasoned with finest organic spices such as chilli, sweet pepper and coriander. They are free from wheat, GMO, gluten, palm oil and are suitable for vegetarians and vegans. This sunflower oil fried snack retails in a 75g pack bearing the EU Leaf logo.



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





# Innovative Chilli Launches: L3M (June – August 2015)

## Pringooals Curry Keeper Flavoured Potato Crisps (Germany)

Pringooals Knabbergebäck mit Currygeschmack (Curry Keeper Flavoured Potato Crisps) have been launched for the 2015 UEFA Cup finals. This limited edition product is suitable for vegetarians and vegans and retails in a 190g tube featuring a competition to win a mini football.



**Claims:**  
Vegan, Vegetarian, Event Merchandising, No Animal Ingredients, Limited Edition

## Ko-Lee Bang! Bang! Noodles Ruby Murray Curry Flavour Noodles (UK)

Ko-Lee Bang! Bang! Noodles Ruby Murray Curry Flavour Noodles are ready to eat in three minutes and made with the goodness of rice bran oil. This halal certified product is suitable for vegetarians and retails in a 65g pack.



**Claims:**  
Halal, Vegetarian, Time/Speed

## Lucky Label Mango Flavoured Thai Sweet Chili Sauce (Thailand)

Lucky Label Mango Flavoured Thai Sweet Chili Sauce is halal certified. This product retails in a 250ml pack, and was on display at the Thaifex 2015 Trade Show, Bangkok.



**Claims:**  
Halal

## Italiamo Peperoncino Chilli Oil Spray (Poland)

Italiamo Spray Peperoncino Chilli w Oleju (Peperoncino Chilli Oil Spray) is now available. The product is said to be an Italian specialty, and comprises chilli pepper extract in sunflower oil. It retails in a 40ml pack.



**Claims:**  
NA



# Innovative Chilli Launches: L3M (June – August 2015)

## Curry Dave Fresh Madras Cook-In Sauce (UK)

Curry Dave Fresh Madras Cook-In Sauce is said to allow to create a delicious curry at home. This concentrated hot sauce is easy to prepare and retails in a 300g pack, bearing the recipe ideas and the Twitter and Facebook links.



**Claims:**  
Ease of Use, Social Media

## Williams-Sonoma Tacolicious Seasoning Blend (USA)

Walkers Sunbites Sunripened Sweet Chilli Flavour Crispy Crackers are said to be full of lovely multigrains, have 30% less fat than regular crackers, and are free from preservatives and artificial colours. The product is suitable for vegetarians and retails in a 5 x 24g pack, bearing the Facebook and Twitter logos.



**Claims:**  
Kosher

## Cape Herb & Spice Chocolate & Chilli Sugar (New Zealand)

Cape Herb & Spice Chocolate & Chilli Sugar can be ground over brownies before baking or used to decorate chocolate icing for cupcakes or cakes. It can also be used as a cappuccino topper. The halal certified product retails in a 45g pack.



**Claims:**  
Halal, Kosher

## Ching's Secret Chicken Chilli Miracle Masala (India)

Ching's Secret Chicken Chilli Miracle Masala is now available in a redesigned 20g pack. This vegetarian product can be cooked in four to five minutes and contains no preservatives or added MSG.



**Claims:**  
No Additives/Preservatives, Vegetarian



# Australian Chilli Launches: L3M (June – August 2015)

**Sirena Premium Tuna Fillet  
Marinated in Chilli**



**Lucha Libre Mexican Meals  
Chilli con Carne with Long  
Grain Rice**



**Garlo's Pies Spicy Mexican  
Pie**



**Woolworths Free From  
Dairy Avocado with Chilli &  
Lime Dip**



**Naked Truth Turn Up The  
Heat Lime Chilli Dark  
Chocolate Block**



**Heston for Coles Spicy  
Bush Tomato Basting  
Sauce**



**Corale India Massaman  
Chicken Curry and Jasmine  
Rice**



**Birds Eye Deli Chilli & Sea  
Salt Seasoned Wedges**





A close-up photograph of fresh green lettuce leaves, showing their characteristic ruffled texture and vibrant color. A large, dark grey circle is superimposed over the center of the image, containing the word "Lettuce." in white text.

Lettuce.



Purchase and consumption of lettuce have both trended downwards in the past three waves.

Mainstream retailers remain the primary channel of purchase for consumers.

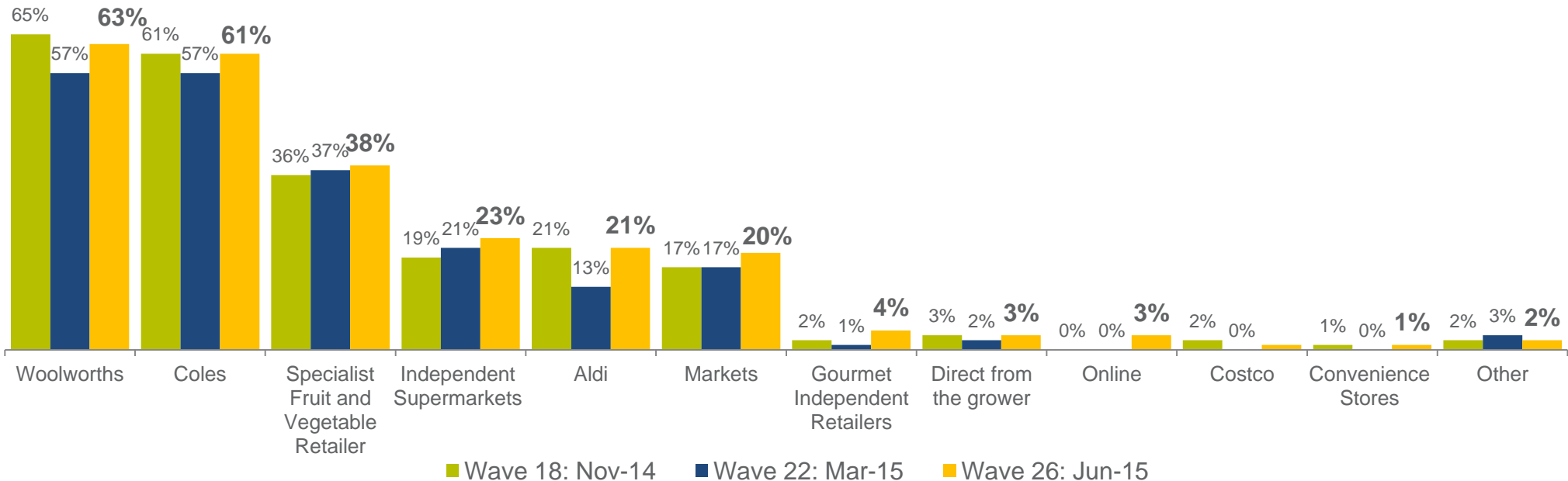


- ▲ 5.6 times, Wave 18
- ▲ 4.6 times, Wave 22



- ▲ 15.7 times, Wave 18
- ▲ 14.0 times, Wave 22

### 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 18 N=399, Wave 22 N=314, Wave 26 N=312





# Average Spend and Price Sensitivity.



Average weight of purchase

The typical consumer purchases **700g** of lettuce, which is slightly higher than the previous wave.

- ▲ 800g, Wave 18
- ▼ 600g, Wave 22



Recalled last spend

Recalled spend on lettuce was **\$2.90**. This is down on previous waves.

- ▲ \$3.70, Wave 18
- ▲ \$3.30, Wave 22



Value for money

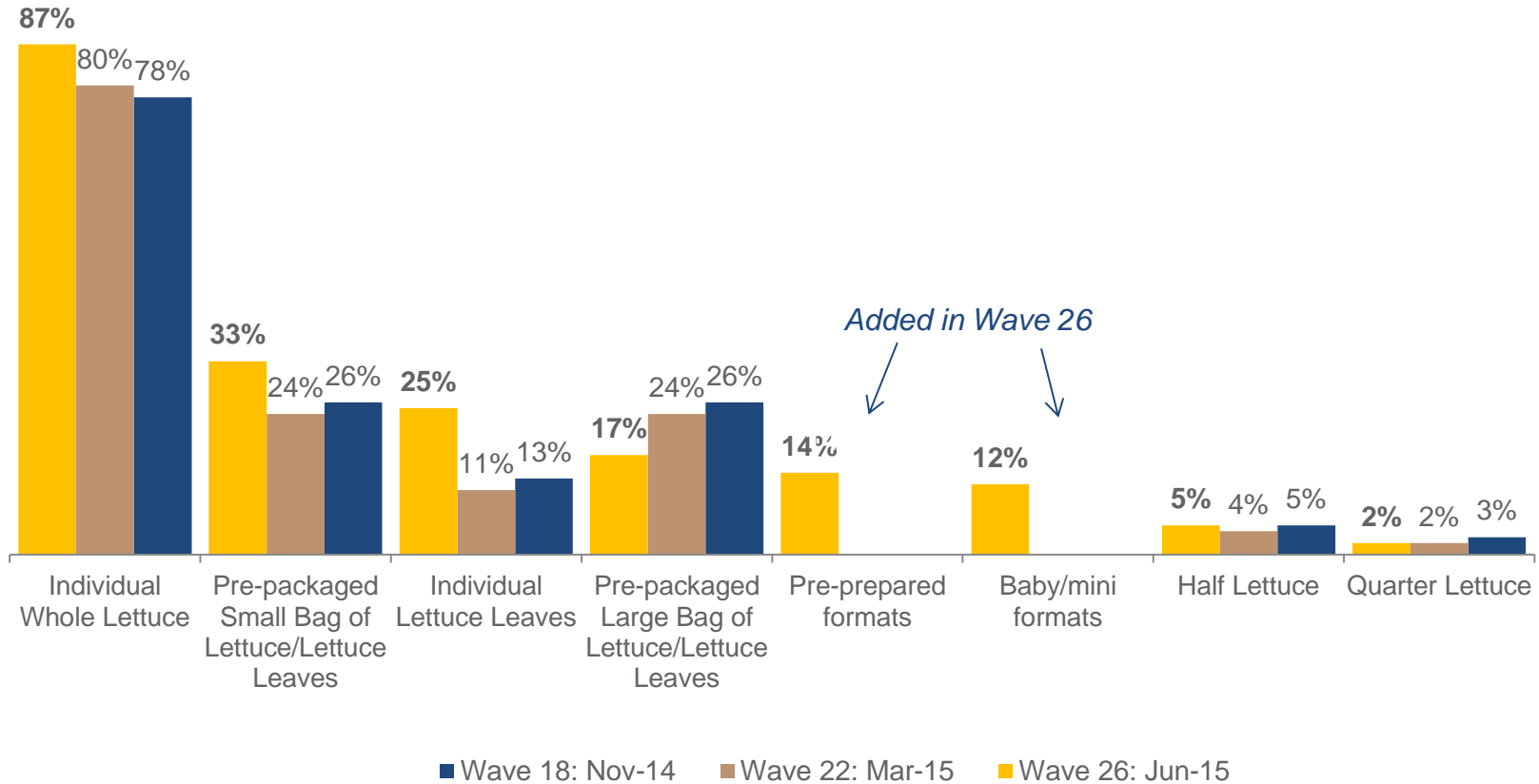
Consumers' perceived value for money is fair (**6.4/10**), slightly higher than past trends.

- ▼ 6.1/10, Wave 18
- ▼ 6.0/10, Wave 22

Q3. How much <commodity> do you typically purchase when you shop for it?  
 Q3b. To the best of your memory how much did this cost on your most recent typically purchase?  
 Q4. Please indicate how Poor to Good Value you think this product is? 0-10 scale  
 Sample Wave 18 N=399, Wave 22 N=314, Wave 26 N=312



Individual lettuce heads are purchased by the majority of consumers. This wave sees a substantial increase in purchase of individual lettuce leaves.

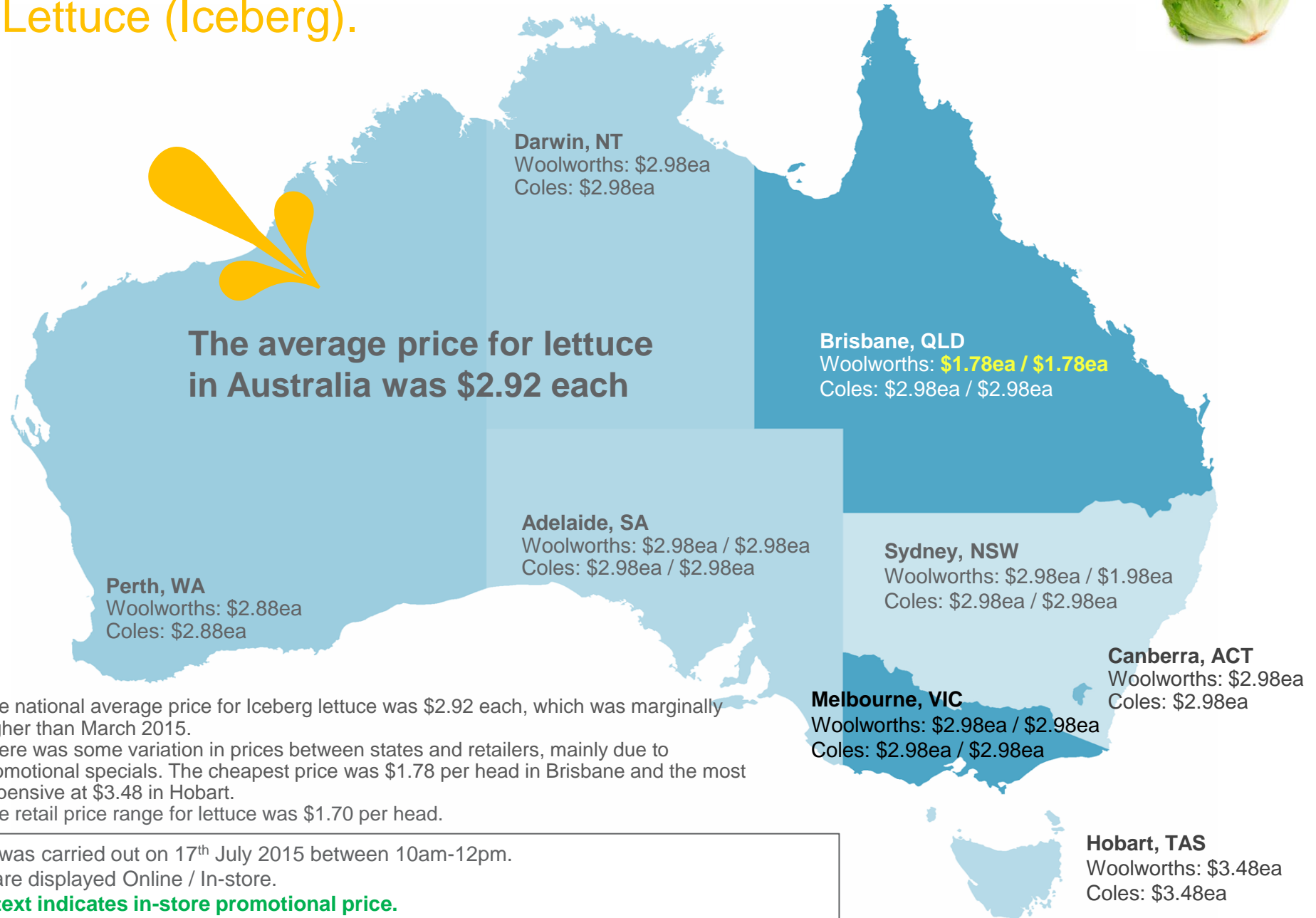


Added in Wave 26

Q4b In what fresh formats do you typically purchase Lettuce?  
Sample Wave 18 N=399, Wave 22 N=314, Wave 26 N=312

# Online and In-store Commodity Prices.

## Lettuce (Iceberg).



- The national average price for Iceberg lettuce was \$2.92 each, which was marginally higher than March 2015.
- There was some variation in prices between states and retailers, mainly due to promotional specials. The cheapest price was \$1.78 per head in Brisbane and the most expensive at \$3.48 in Hobart.
- The retail price range for lettuce was \$1.70 per head.

Pricing was carried out on 17<sup>th</sup> July 2015 between 10am-12pm.  
Prices are displayed Online / In-store.

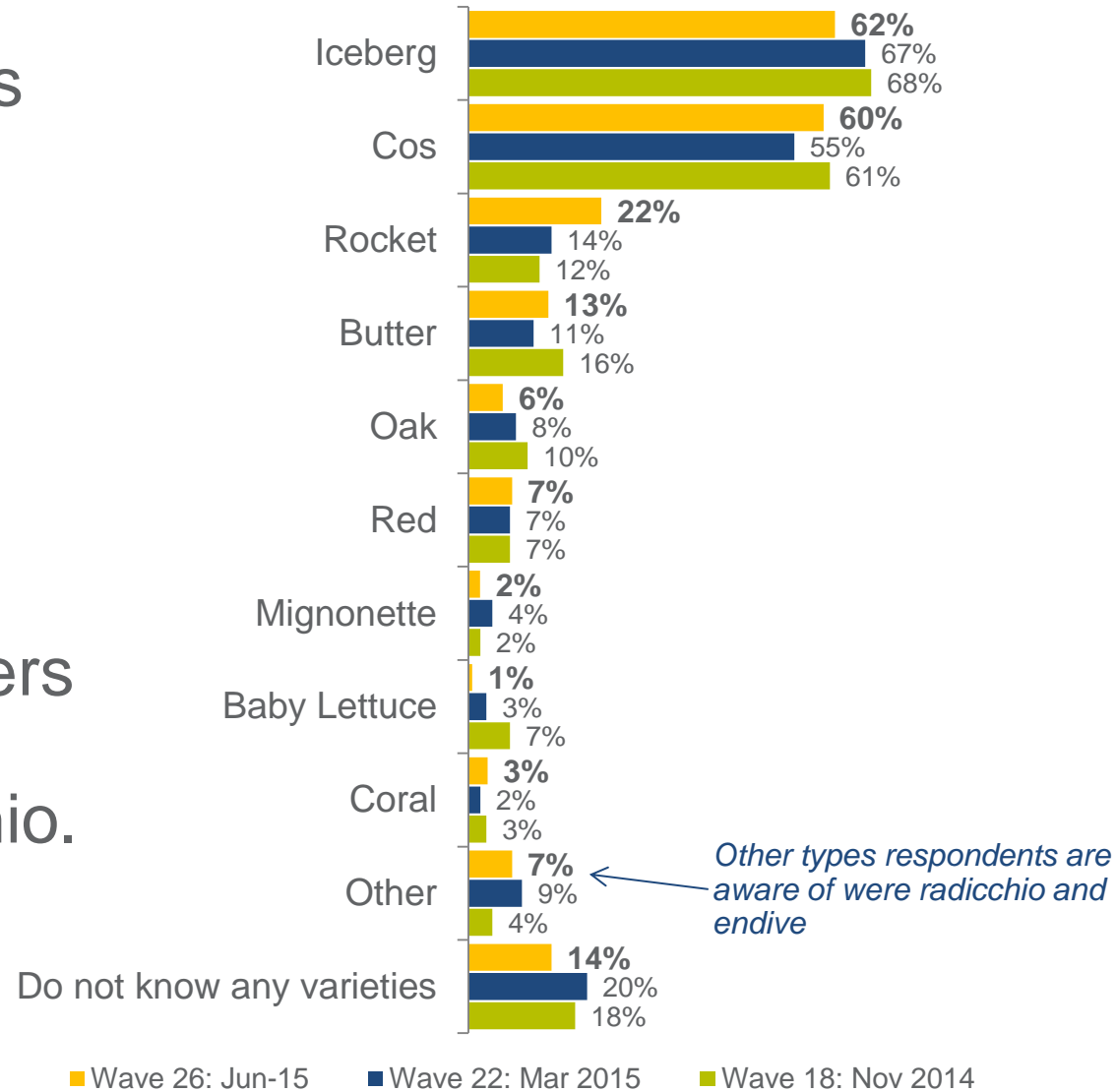
**Green text indicates in-store promotional price.**



Awareness of lettuce types has improved this wave.

Iceberg and Cos have the greatest level of recall.

Some of the lettuce types recalled are not actually lettuce, however, consumers perceive them to be, e.g. rocket, endive and radicchio.



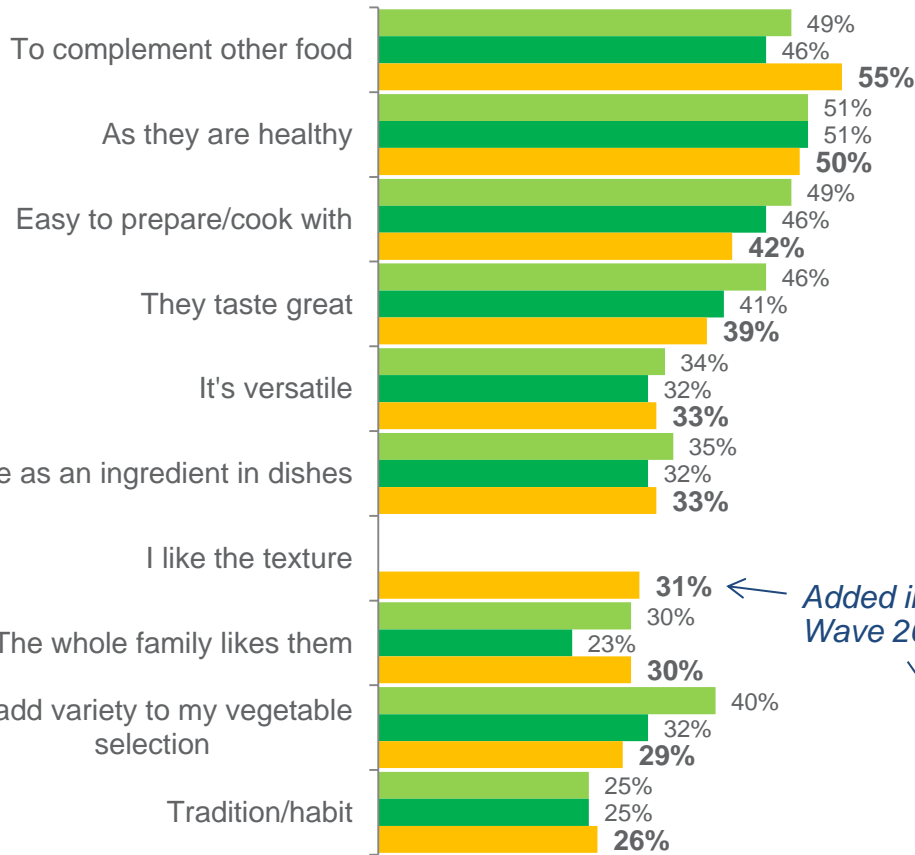
Q6a. What types/varieties of <commodity> are you aware of? (unprompted)  
Sample Wave 18 N=399, Wave 22 N=314, Wave 26 N=312



Purchasing lettuce is triggered by complementing other food, health, and ease of preparation. Not wanting to waste any and a short shelf life are key barriers to purchase.

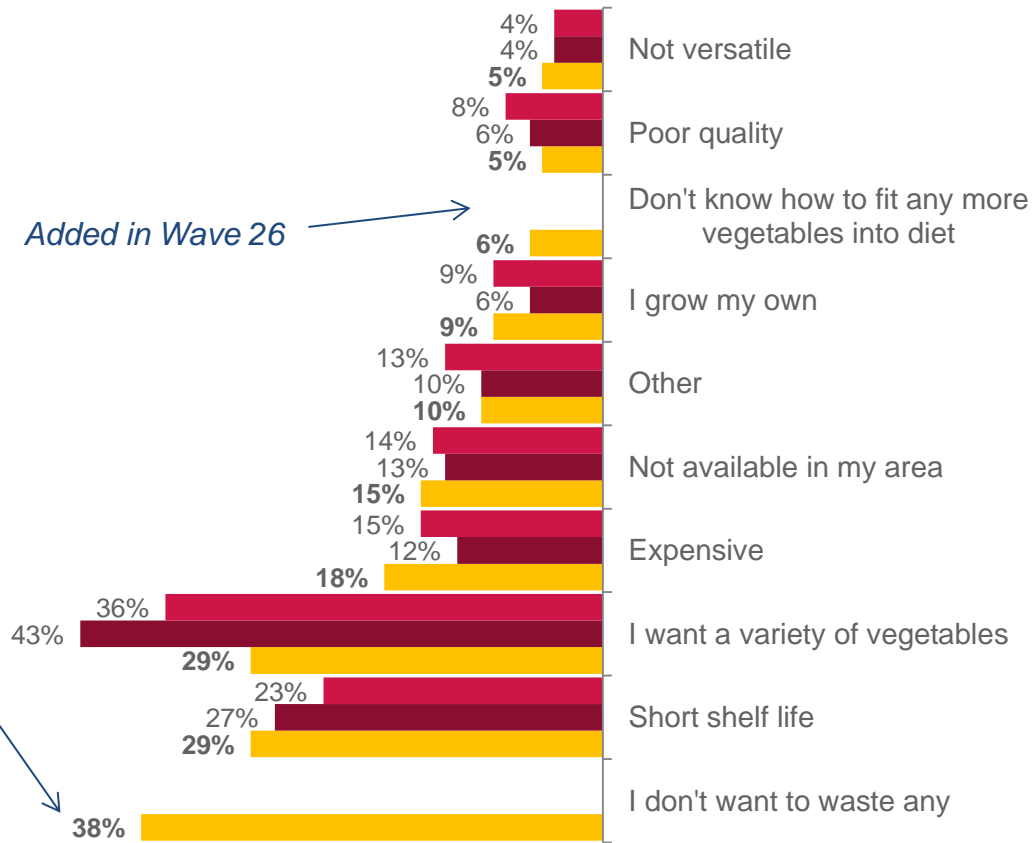


### Triggers



Added in Wave 26

### Barriers



Added in Wave 26

■ Wave 18: Nov-14   ■ Wave 22: Mar-15   ■ Wave 26: Jun-15

■ Wave 18: Nov-14   ■ Wave 22: Mar-15   ■ Wave 26: Jun-15

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 18 N=399, Wave 22 N=314, Wave 26 N=312





Australian cuisine remains popular. This month saw an increase in Italian and Greek cooking.

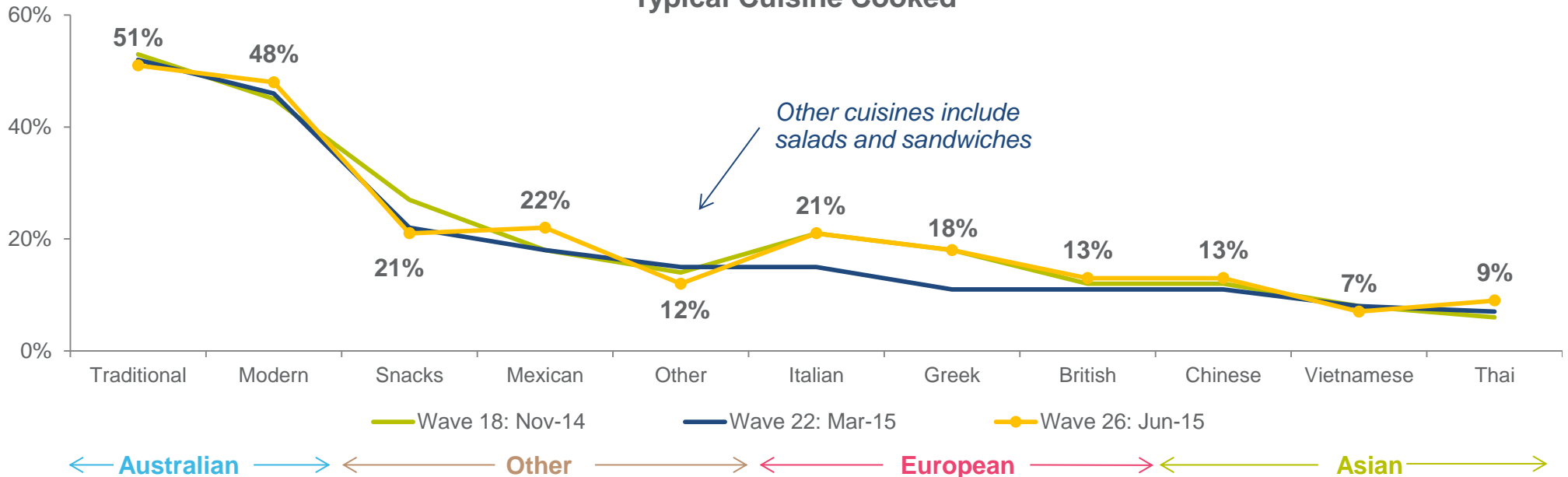
Lettuce consumption is most popular during lunch.



### Top Consumption Occasions

	Wave 26
Lunch	73%
Dinner	58%
Quick Meals	57%
Family Meals	51%
Weekday Meals	45%

### Typical Cuisine Cooked

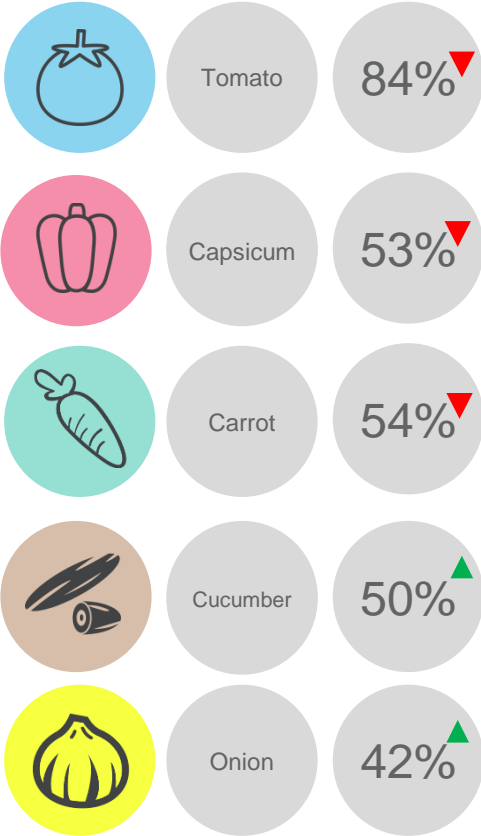


Q10. What cuisines do you cook/consume that use <commodity> ?  
 Q11. Which of the following occasions do you typically consume/use <commodity> ?  
 Sample Wave 18 N=399, Wave 22 N=314, Wave 26 N=312



The majority of lettuce is eaten raw and served with tomatoes, capsicum and carrots.

### Accompanying Vegetables

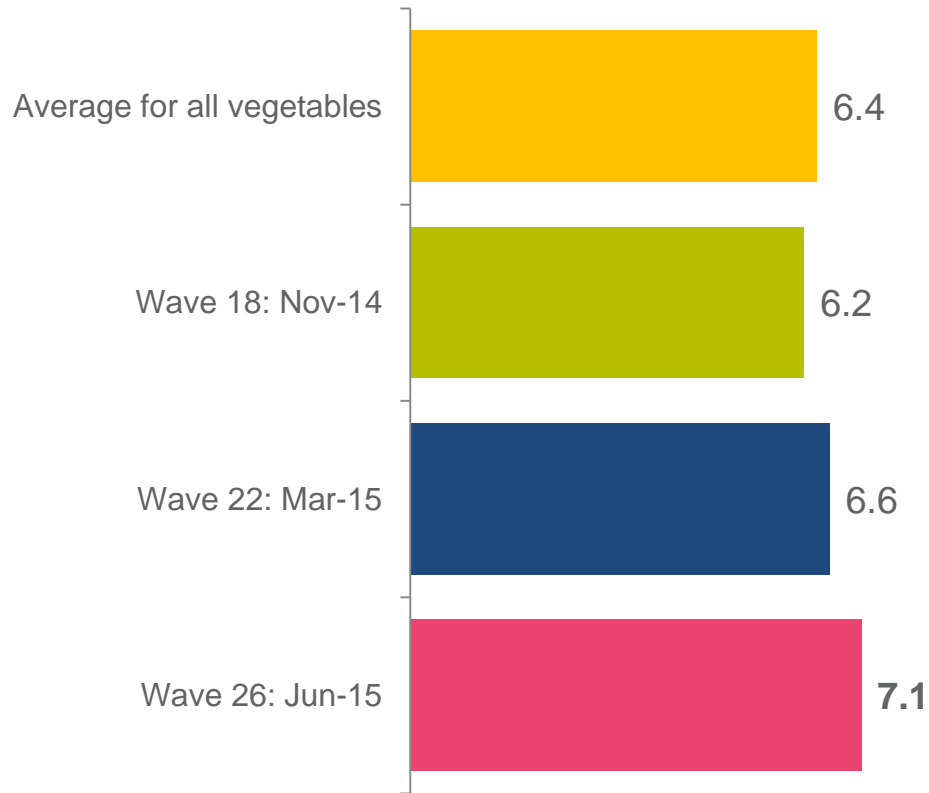


Top 10 Cooking Styles			
	Wave 18	Wave 22	Wave 26
Raw	76%	71%	81%
Other- not cooked	19%	21%	13%
Stir frying	7%	7%	7%
Boiling	3%	2%	4%
Soup	4%	3%	4%
Deep Frying	0%	1%	3%
Steaming	4%	2%	3%
Sautéing	2%	3%	3%
Roasting	1%	0%	1%
Stewing	1%	0%	1%

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 18 N=399, Wave 22 N=314, Wave 26 N=312



There has been another noticeable increase in the importance of lettuce provenance this month. Knowing that lettuce is grown in Australia is highly important information for consumers.



Q14. When purchasing <commodity>, how important is Provenance to you?  
Q15. And when purchasing Lettuce, how important is that it is grown in Australia?  
Sample Wave 18 N=399, Wave 22 N=314, Wave 26 N=312



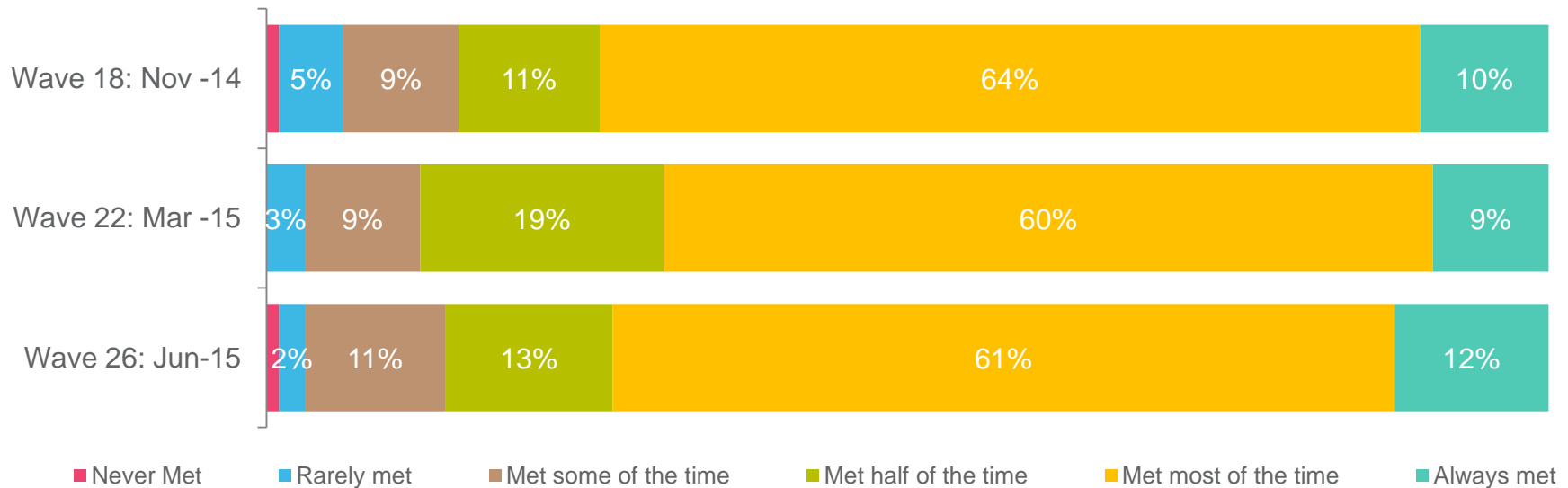
Expected longevity of freshness has risen from previous waves.

These expectations are mostly being met, which is consistent with previous waves.

Expected to stay fresh for 7.7 days

- ▼ 7.2 days, Wave 18
- ▼ 7.1 days, Wave 22

### 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 18 N=399, Wave 22 N=314, Wave 26 N=312

A close-up photograph of fresh green lettuce leaves, showing their texture and veins. A large, dark grey circle is overlaid in the center of the image, containing the title text.

# Lettuce Product Launch Trends.



# Lettuce Global Launches

June – August 2015

There were 188 products launched globally over the last three months that contained lettuce as an ingredient. The main regions for launches were Europe and Asia Pacific. Product launches were primarily meals and fruit and vegetables.





# Lettuce Product Launches: Last 3 Months (June – August 2015) Summary

- Globally, there were 188 products launched, which was higher than in previous waves.
- There were 9 products containing lettuce as an ingredient launched in Australia over the last 3 months.
- The majority of products were launched in Europe (59%) and Asia Pacific (26%).
- Flexible formats (35%) and trays (19%) were the main packaging formats used.
- The top categories for launches were meals (40%), fruit and vegetables (32%) and juice drinks (23%), which was consistent with previous trends.
- The key claims used over the past three months were ease of use (34%), environmentally friendly packaging (29%) and no additives and preservatives (29%).
- The most innovative launch found was an organic cold pressed juice from Canada. Examples of these can be found over the next slides.



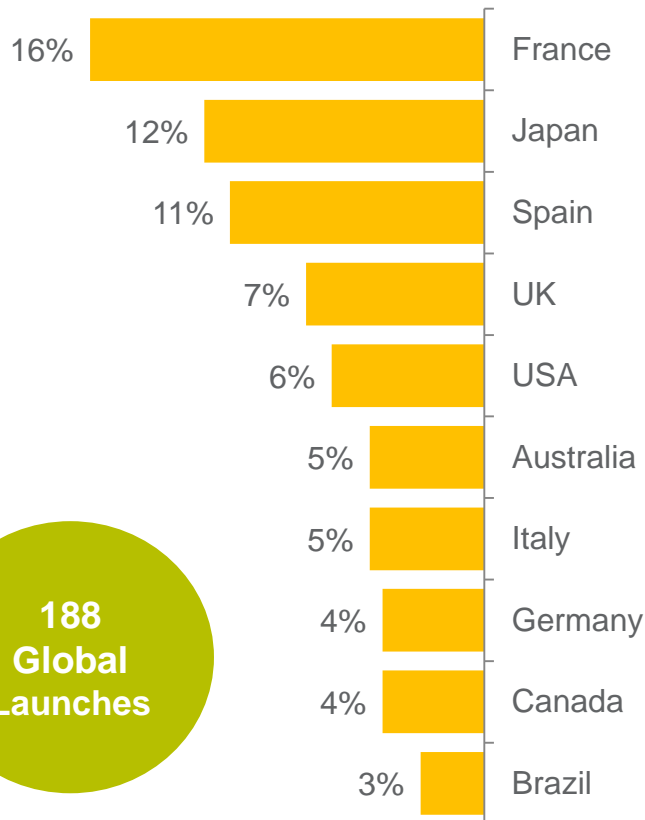
Source: Mintel (2015)



The main countries for products launched were France, Japan and Spain.

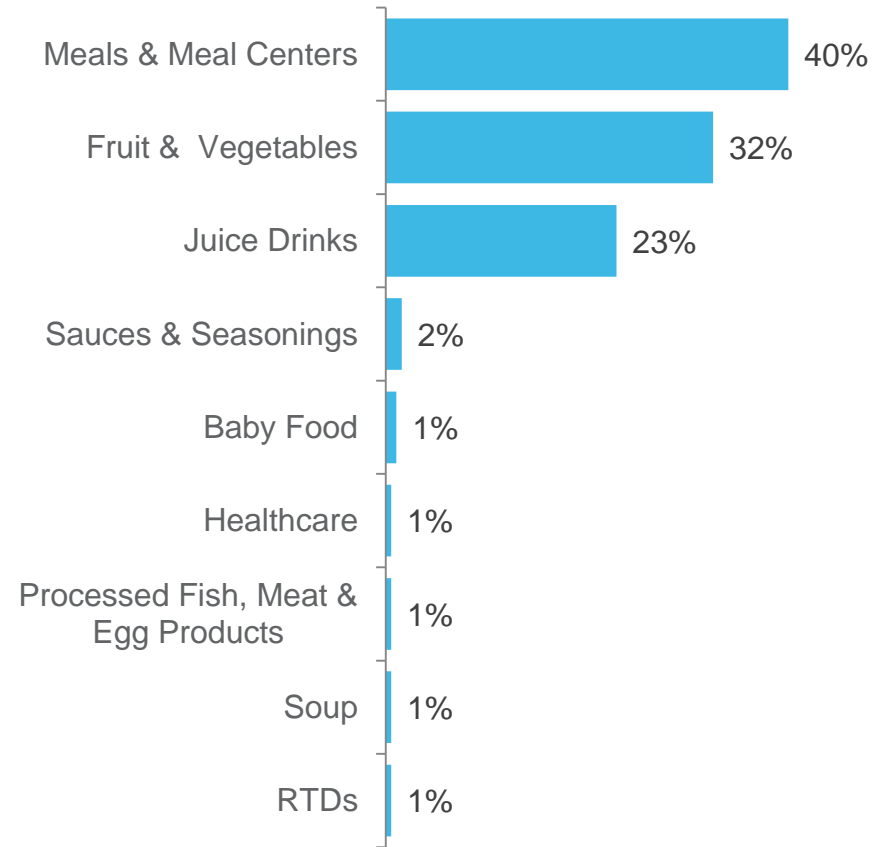
Consistent with previous trends, launches were in meals, fruit and vegetables and juice categories.

Top Launch Countries



188  
Global  
Launches

Top Launch Categories














Product claims were around ease of use and health. This was consistent with Europe, the region with the most launches in the last three months. Flexible packs and trays were most commonly used formats.

### Pack Formats Used

Global		Flexible	35%
		Tray	19%
		Bottle	13%
Europe		Flexible	49%
		Tray	29%
		Clam-Pack	8%
Asia Pacific		Bottle	29%
		Carton	22%
		Flexible	16%

### Top Claims Used

Global		Ease of Use	34%
		Ethical - Environmentally Friendly Package	29%
		No Additives/Preservatives	29%
Europe		Ease of Use	50%
		Ethical - Environmentally Friendly Package	25%
		No Additives/Preservatives	22%
Asia Pacific		Ethical - Environmentally Friendly Package	51%
		No Additives/Preservatives	47%
		Low/No/Reduced Sodium	39%

# »»» Innovative Lettuce Launches: L3M (June – August 2015)

## Bonduelle Baby Lettuce (Italy)

Bonduelle Il Lattughino (Baby Lettuce) is now available in a newly designed 90g pack providing two portions and featuring a prize draw competition and the L. Bonduelle logo, a foundation which promotes awareness regarding the consumption of vegetables. The product is fresh and ready to season. Once harvested, it is packaged within 24 hours. The manufacturer states to respect the season cycle of the products.



**Claims:**  
Ease of Use, Ethical - Environmentally Friendly Product

## V8 Original Low Sodium 100% Vegetable Juice (Philippines)

V8 Original Low Sodium 100% Vegetable Juice has been repackaged and is now available in a new 340ml recyclable can providing two full servings of vegetables. This premium quality pasteurised product is made from concentrate with added ingredients, is certified as kosher, and does not contain gluten.



**Claims:**  
Low/No/Reduced Allergen, Kosher, Ethical - Environmentally Friendly Package, Gluten-Free, Low/No/Reduced Sodium, Premium

## Carrefour Bon App' Classique Serpentine Pasta Salad with Tomato, Mozzarella & Basil (France)

Carrefour Bon App' Classique Serpentine Tomates Mozzarella Basilic (Serpentine Pasta Salad with Tomato, Mozzarella & Basil) comprises egg pasta with tomatoes, green salad, mozzarella and basil sauce. This product retails in a 250g salad shaker pack that includes a plastic fork and a separate sauce pack.



**Claims:**  
NA

## Marks & Spencer Salads Fruits & Vegetables Mozzarella & Santini Tomato Salad (Ireland)

Marks & Spencer Salads Fruits & Vegetables Mozzarella & Santini Tomato Salad with an Aged Balsamic Dressing is now available. The product is suitable for vegetarians and retails in a 160g partly recyclable pack.



**Claims:**  
Vegetarian, Ethical - Environmentally Friendly Package, Ethical - Animal



# »»» Innovative Lettuce Launches: L3M (June – August 2015)

## Campo Vivo Exotic Mix Organic Salad (Mexico)

Campo Vivo Mix Exótica Orgánica (Exotic Mix Organic Salad) has been repackaged in a 100% compostable and biodegradable pack. The product contains pre-washed and ready to eat selected tender leaves of eight different varieties. This salad is rich in vitamins A, B2, B9, C, K; minerals such as magnesium, iron, phosphorous and calcium; and antioxidants. It is USDA and BioAgri certified and retails in a 100g pack, bearing QR code.



**Claims:**  
Ethical - Environmentally Friendly Package, Organic, Antioxidant, Ethical - Environmentally Friendly Product, Ease of Use

## Sarraf Ghavoot (Iran)

Sarraf Ghavoot is 100% natural and provides plenty of fatty acids and unsaturated fats, fibre, protein, vitamins, natural antioxidants and necessary salts for the body. The product consists of 40 herbal ingredients and retails in a 200g pack.



**Claims:**  
Botanical/Herbal, All Natural Product, Antioxidant

## Liquid Nutrition Dream Organic Cold Pressed Juice (Canada)

Liquid Nutrition Dream Organic Cold Pressed Juice is said to be liquid nutrition that contains antioxidants, which protects the respiratory system from infections and free radicals, and helps lower risk of coronary heart disease. It contains beta-carotene, lutein, and zeaxanthin, which are great for keeping for keeping eyes healthy. Thousand of pounds of pressure are claimed to be applied to the fresh ingredients to extract all the healthy nutrients so the body can absorb them quickly.



**Claims:**  
Immune System (Functional), Other (Functional), Time/Speed, Weight & Muscle Gain, Organic, Antioxidant, Cardiovascular (Functional)

## Asda Side Salads Sweet & Crunchy Salad (UK)

Asda Side Salads Sweet & Crunchy Salad comprises carrot, salad leaves, red cabbage, sweetcorn and red peppers. The washed and ready to eat product retails in a 165g partly recyclable pack that serves two.



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

# ➤➤➤ Innovative Lettuce Launches: L3M (June – August 2015)

## Cawston Press Sweet Greens Apple, Pear, Cucumber & Lettuce Nectar (Belgium)

This original fruit and veg blend is said to be bright and beautiful and is made with succulent blushing pears, super-cool cucumber and crisp lettuce, with a twist of mint, signature apple juice and a splash of water. The juice is not from concentrate, contains no added sugar, artificial sweeteners, colourings or preservatives, and provides one of the five a day.



**Claims:**  
No Additives/Preservatives, All Natural Product, Ethical - Environmentally Friendly Package, Social Media, Low/No/Reduced Sugar

## Luli Tonix Fresh Blended Greens (USA)

Luli Tonix Fresh Blended Greens are nutrient dense, phytonutrient-rich super green low-sugar blend made with all organic and non-GMO ingredients with no heat or no pressure. The greens are said to be blended rather than pressed or squeezed to retain all the fiber crucial to the health, energy, beauty and vitality. The unpasteurized product features anti-inflammatory, immunity-boosting, cleansing and nourishing properties and also helps to keep the blood sugar stabilized.



**Claims:**  
Ease of Use, Vegan, No Animal Ingredients

## Menu From Waitrose Pork Meatballs (UK)

Menu From Waitrose Pork Meatballs are described as succulent pork and spicy nduja paste meatballs in tomato sauce with garlic and basil. The product retails in a partly recyclable 480g pack containing two servings.



**Claims:**  
Ethical - Environmentally Friendly Package

## Tesco Jedz Swieze Salatka Prosciutto Salad with Sundried Tomatoes & Mustard Sauce (Poland)

The fresh product comprises Parma ham, rocket, sundried tomatoes, and sunflower seeds. It retails in a 240g pack providing one serving, and including a sachet of sauce and a fork.



**Claims:**  
NA



# Australian Lettuce Launches: L3M (June – August 2015)

## Local Hand Made Chicken Parma Sub

Local Hand Made Chicken Parma Sub is now available. The product retails in a 285g recyclable pack.



**Claims:**  
Ethical - Environmentally Friendly Package

## Local Hand Made Lamb Greek Tzatziki Salad

Local Hand Made Lamb Greek Tzatziki Salad has been repackaged. The product now retails in a new 290g recyclable and reusable pack containing a tub of dressing.



**Claims:**  
Ethical - Environmentally Friendly Package

## Local Hand Made Roast Duck Hoisin Wrap

Local Hand Made Roast Duck Hoisin Wrap is now available. The product retails in a 210g recyclable pack.



**Claims:**  
Ethical - Environmentally Friendly Package





# Sweet Corn.

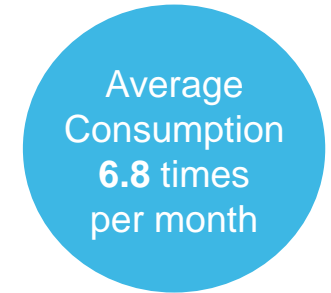


Purchase and consumption of sweet corn is higher than previous months.

Purchase remains primarily through Coles and Woolworths. This month sees a continuous increase in purchase from markets and independent supermarkets.

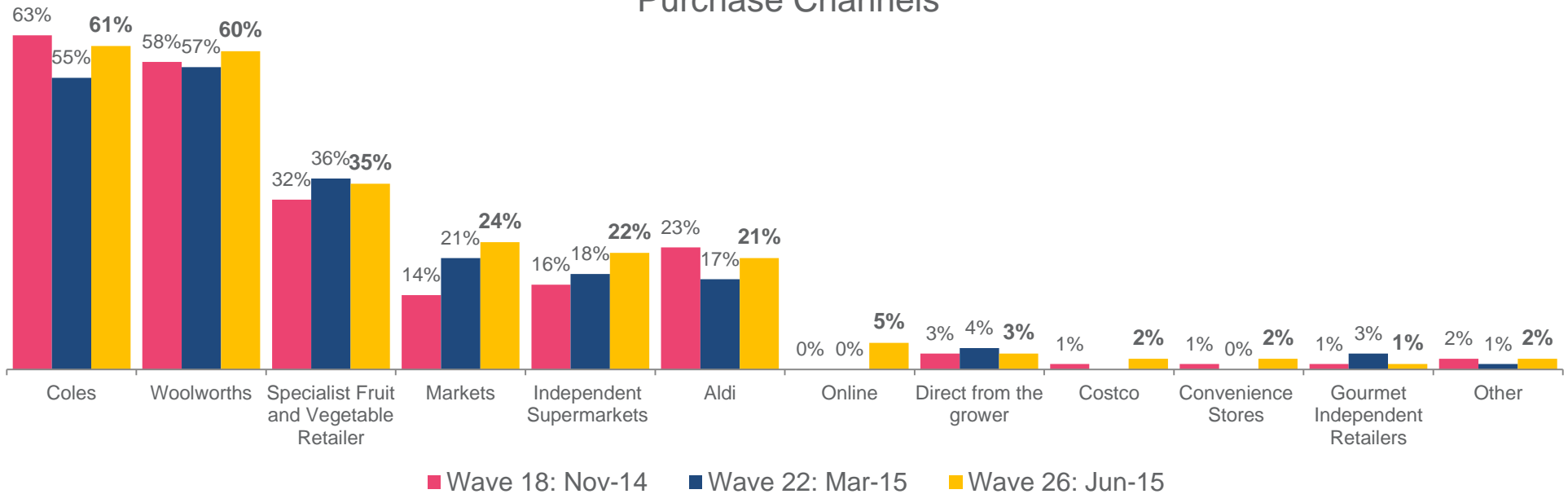


- ▼ 3.6 times, Wave 18
- ▼ 3.3 times, Wave 22



- ▼ 6.7 times, Wave 18
- ▼ 6.2 times, Wave 22

### Purchase Channels



Q1. On average, how often do you purchase <commodity>?  
 Q2. On average, how often do you consume <commodity>?  
 Q5. From which of the following channels do you typically purchase <commodity>?  
 Sample Wave 18 N=398, Wave 22 N=311, Wave 26 N=304





# Average Spend and Price Sensitivity.



Average weight of purchase

The typical consumer purchases **1.1kg** of sweet corn, which is higher than previous waves.

- ▼ 0.9kg, Wave 18
- ▼ 0.9kg, Wave 22



Recalled last spend

Recalled last spend on sweet corn was **\$4.10**, which is more expensive than in Wave 22.

- ▲ \$4.30, Wave 18
- ▼ \$3.70, Wave 22



Value for money

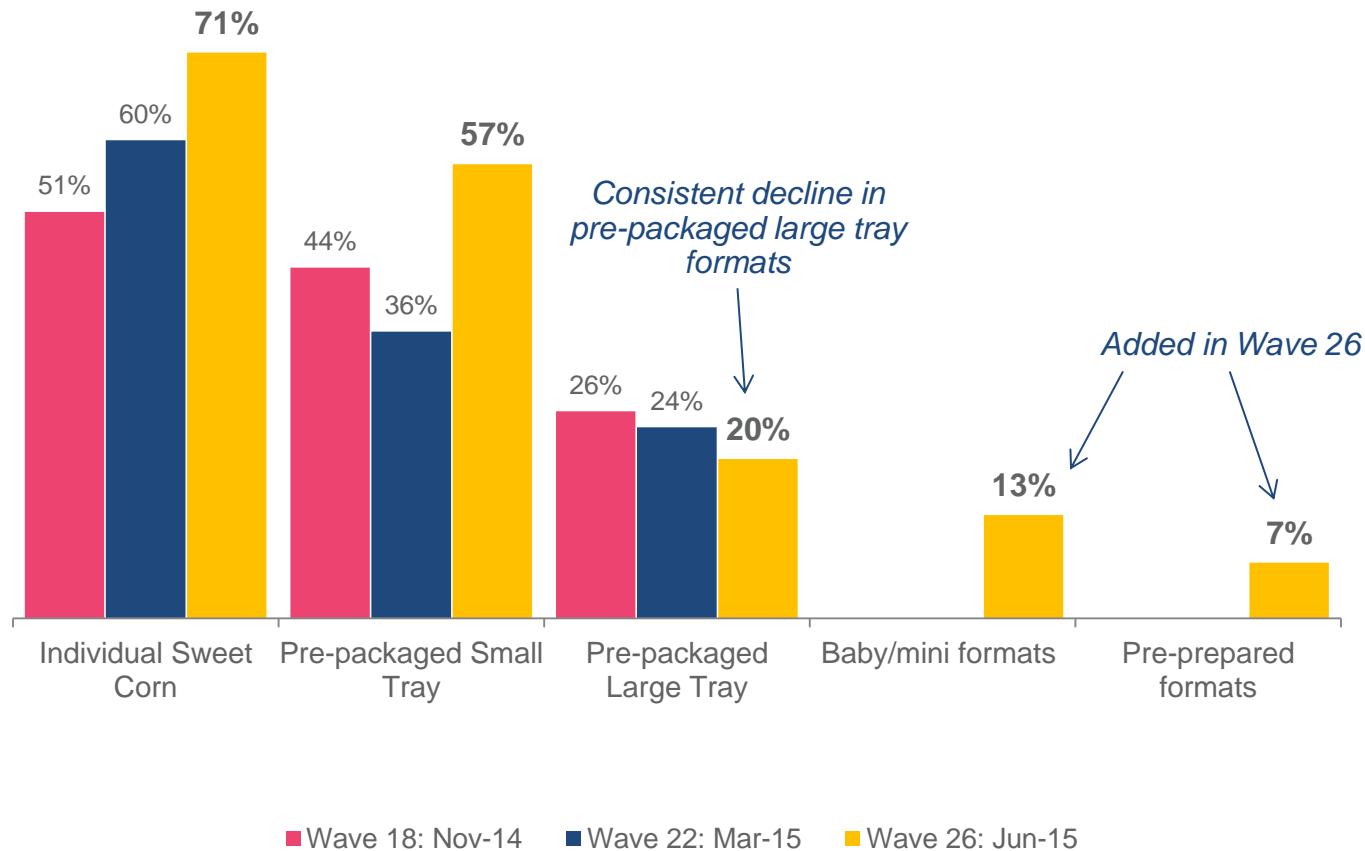
Consumers' perceived value for money was good (**6.7/10**), which has consistently increased across waves.

- ▼ 6.5/10, Wave 18
- ▼ 6.6/10, Wave 22

Q3. How much <commodity> do you typically purchase when you shop for it?  
 Q3b. To the best of your memory how much did this cost on your most recent typically purchase?  
 Q4. Please indicate how Poor to Good Value you think this product is?  
 Sample Wave 18 N=398, Wave 22 N=311, Wave 26 N=304



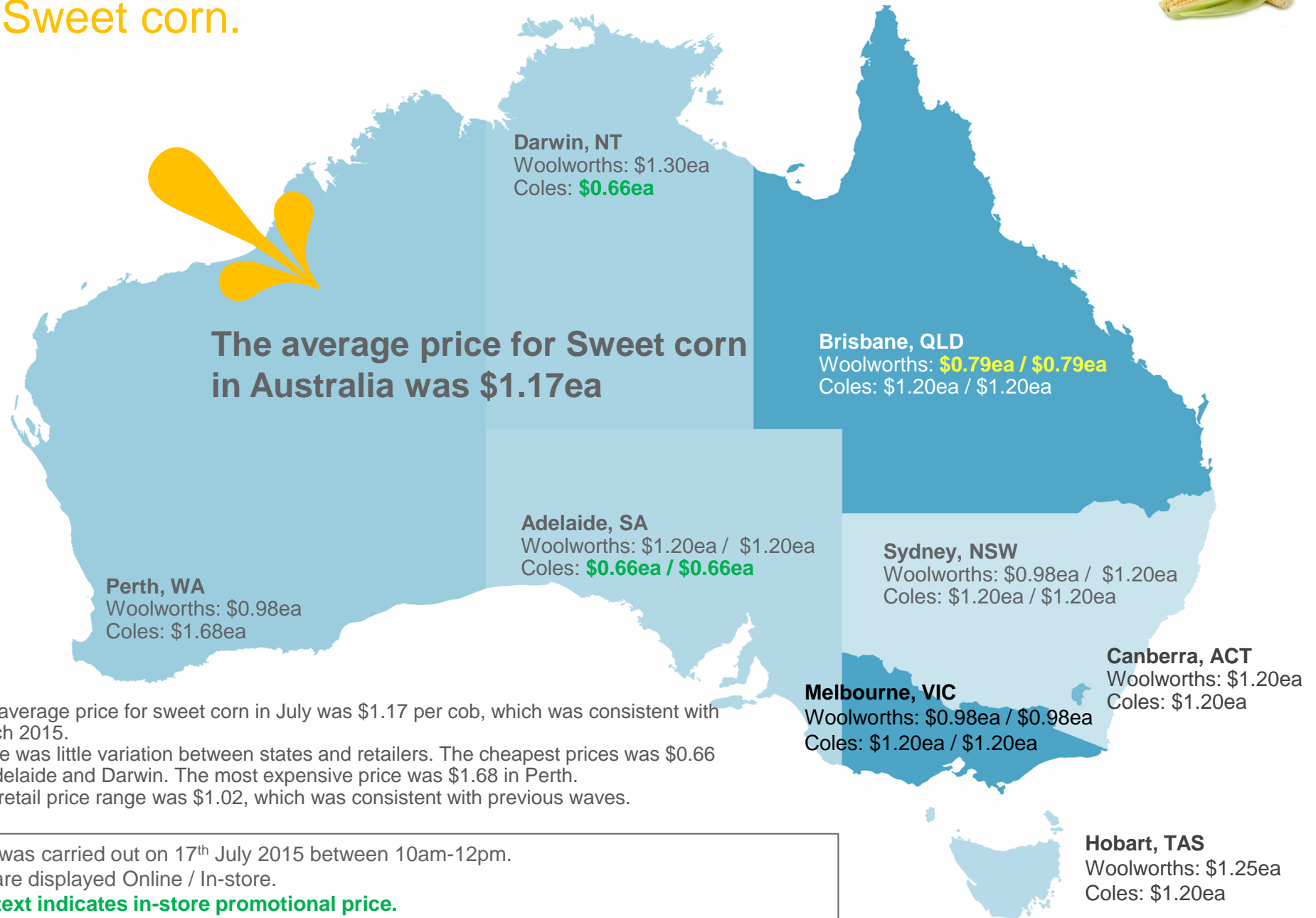
Individual cobs and small trays of corn remain the most common formats purchased. There has been a consistent decline in pre-packaged large trays in the last three waves.



Q4b In what fresh formats do you typically purchase Sweet Corn?  
Sample Wave 18 N=398, Wave 22 N=311, Wave 26 N=304

# Online and In-store Commodity Prices.

## Sweet corn.



- The average price for sweet corn in July was \$1.17 per cob, which was consistent with March 2015.
- There was little variation between states and retailers. The cheapest prices was \$0.66 in Adelaide and Darwin. The most expensive price was \$1.68 in Perth.
- The retail price range was \$1.02, which was consistent with previous waves.

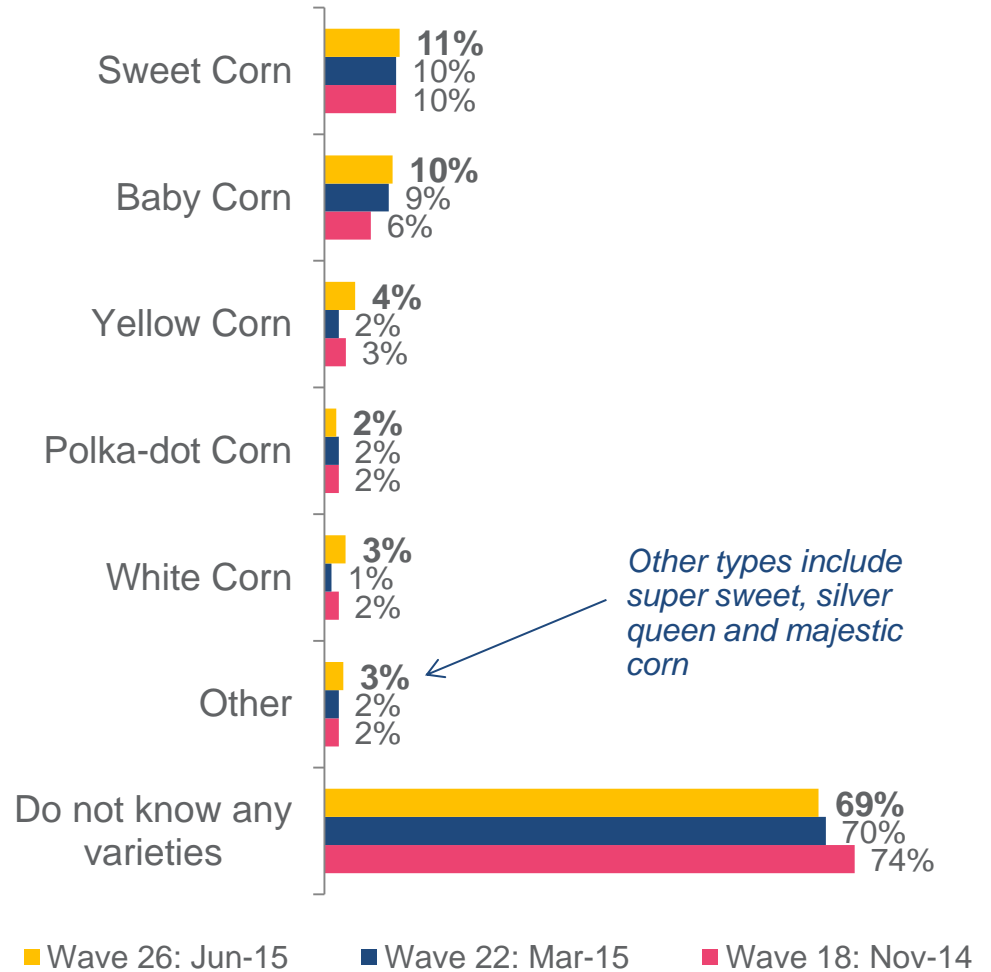
Pricing was carried out on 17<sup>th</sup> July 2015 between 10am-12pm.  
Prices are displayed Online / In-store.

**Green text indicates in-store promotional price.**



Awareness of sweet corn remains very low.

Sweet corn in general remains the most recalled type.



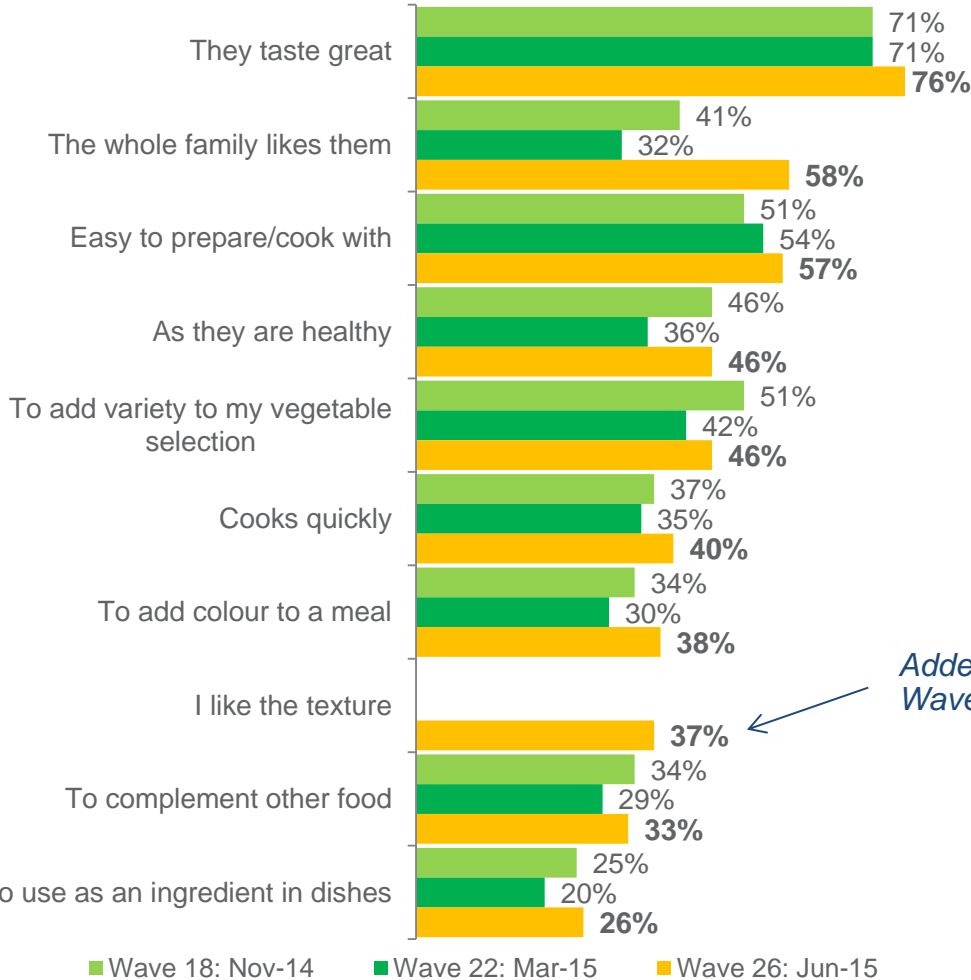
Q6a. What varieties of <commodity> are you aware of? (unprompted)  
Sample Wave 18 N=398, Wave 22 N=311, Wave 26 N=304



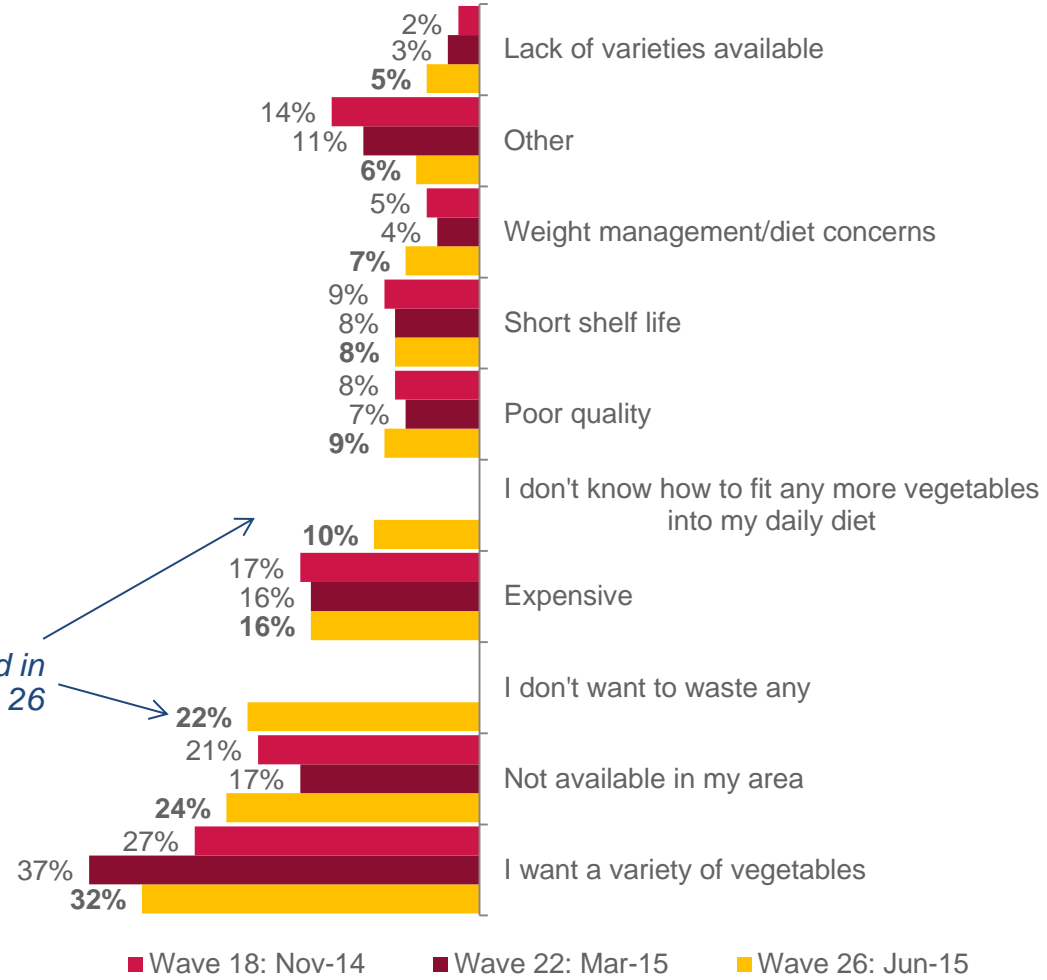
The key motivation to purchasing sweet corn is taste. This month sees a substantial increase in the whole family liking sweet corn as a key trigger to purchase. Key barriers include consumers wanting a variety of vegetables in their diet and also because there was limited availability of the product in their area.



### Triggers



### Barriers



Added in Wave 26

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 18 N=398, Wave 22 N=311, Wave 26 N=304





Australian cuisine continues to be used for sweet corn meals. There has been an increase in sweet corn being cooked as a snack.

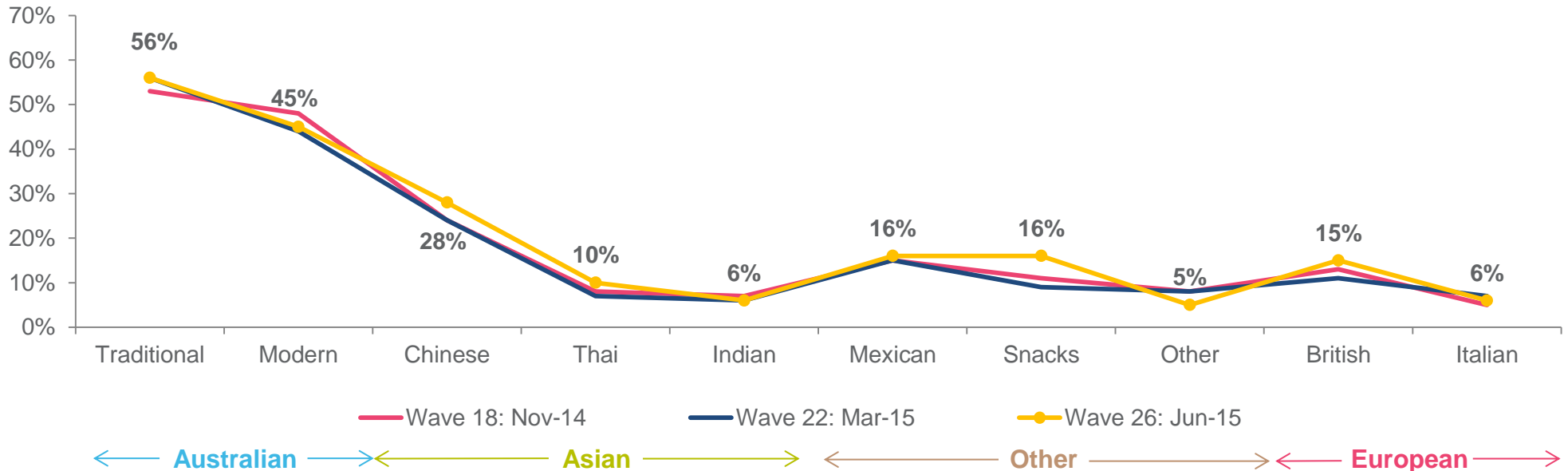
Dinner and family meals remain the main meal occasions for corn.



### Top Consumption Occasions

	Wave 26
Dinner	71%
Family Meals	61%
Weekday Meals	43%
Quick Meals	40%
Weekend Meals	39%

### Typical Cuisine Cooked

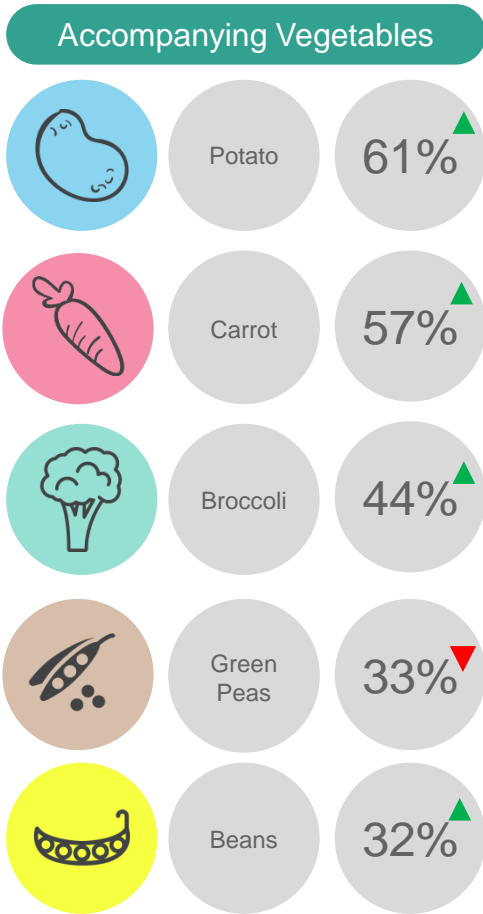


Q10. What cuisines do you cook/consume that use <commodity>?  
 Q11. Which of the following occasions do you typically consume/use <commodity>?  
 Sample Wave 18 N=398, Wave 22 N=311, Wave 26 N=304



On trend with previous waves, consumers prefer to boil, steam and microwave sweet corn.

Potatoes, carrots, and broccoli are regularly served with sweet corn.

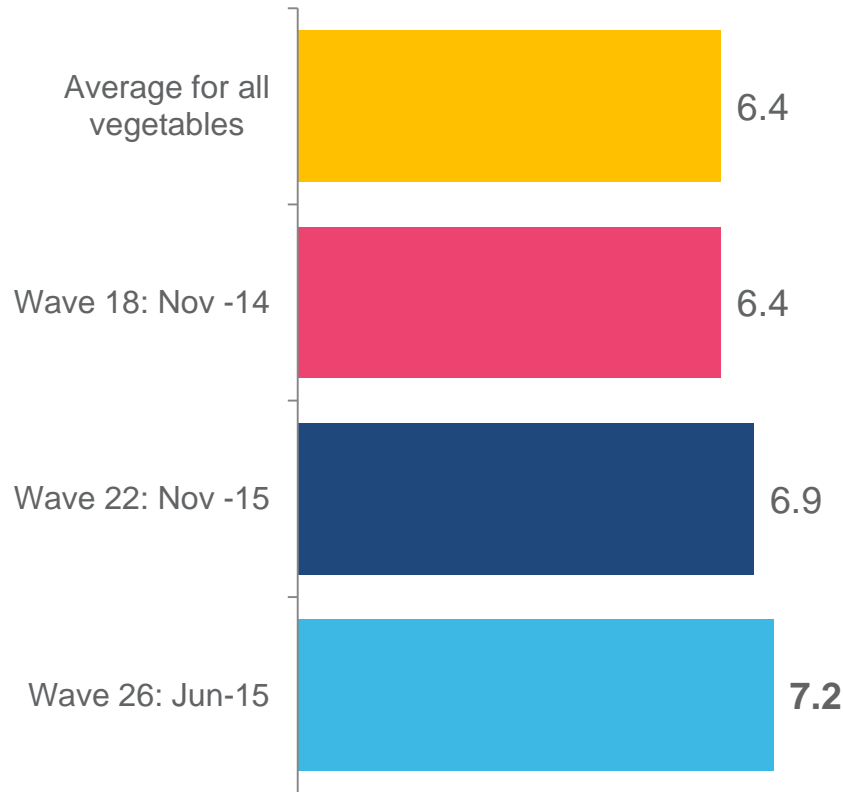


Top 10 Cooking Styles			
	Wave 18	Wave 22	Wave 26
Boiling	54%	57%	54%
Steaming	46%	40%	46%
Microwave	31%	26%	31%
Stir frying	16%	13%	24%
Soup	15%	14%	20%
Roasting	10%	13%	14%
Grilling	13%	10%	14%
Stewing	5%	4%	8%
Baking	5%	7%	8%
Raw	6%	7%	6%

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 18 N=398, Wave 22 N=311, Wave 26 N=304



Over the past months importance of provenance has increased. It is a crucial time to clearly label Australian sweet corn to reassure consumers of the quality of the produce.



Q14. When purchasing <commodity>, how important is Provenance to you?  
Q15. And when purchasing Sweet Corn, how important is that it is grown in Australia?  
Sample Wave 18 N=398, Wave 22 N=311, Wave 26 N=304

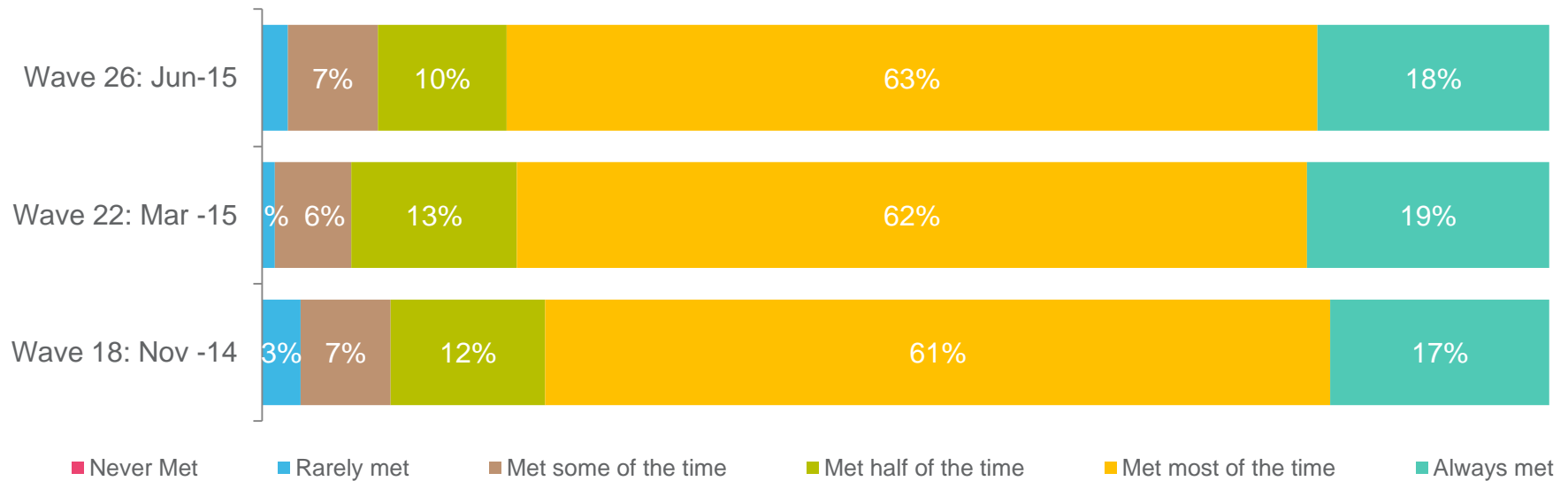


Sweet corn freshness is largely unaffected by seasonal changes, with consistent longevity and expectations of freshness across waves.

Expected to stay fresh for 8.0 days

- ▲ 7.9 days, Wave 18
- ▲ 7.7 days, Wave 22

### 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 18 N=398, Wave 22 N=311, Wave 26 N=304

A close-up photograph of several ears of yellow sweet corn, showing the rows of kernels and the green husks. A large, dark grey circle is overlaid in the center of the image.

# Sweet Corn Product Launch Trends.



# Sweet Corn Global Launches

## June – August 2015

There were 74 sweet corn products launched globally over the last three months. The majority of launches were in Japan. Categories for launches were fruit & vegetables. Key packaging for sweet corn products was flexible formats.



## Sweet Corn Product Launches: Last 3 Months (June – August 2015) Summary

- There were only 74 product launches in the past 3 months globally that contained sweet corn as an ingredient, compared with 326 products launched in the previous wave.
- There were five products launched in Australia over the past three months.
- Asia Pacific (59%) and Europe (24%) were the key regions for launches, with North America significantly decreasing in launches this wave.
- Flexible packaging (22%) remained the most common format used for products.
- The main categories for launches were fruits & vegetables (30%), meals (18%) and baby food (16%).
- Claims used on products highlighted convenience; microwaveable (31%) and ease of use (23%) and health; no additives/preservatives (32%) and low/no/reduced allergen (14%).
- The most innovative product launched was a chicken soup & sweet corn baby cereal in Vietnam. Examples of these can be found in the following pages.

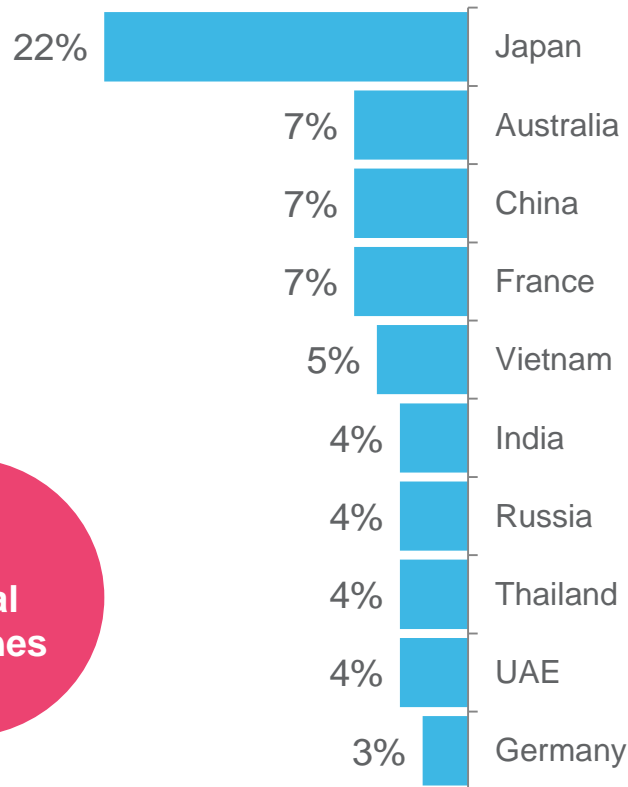


Source: Mintel (2015)

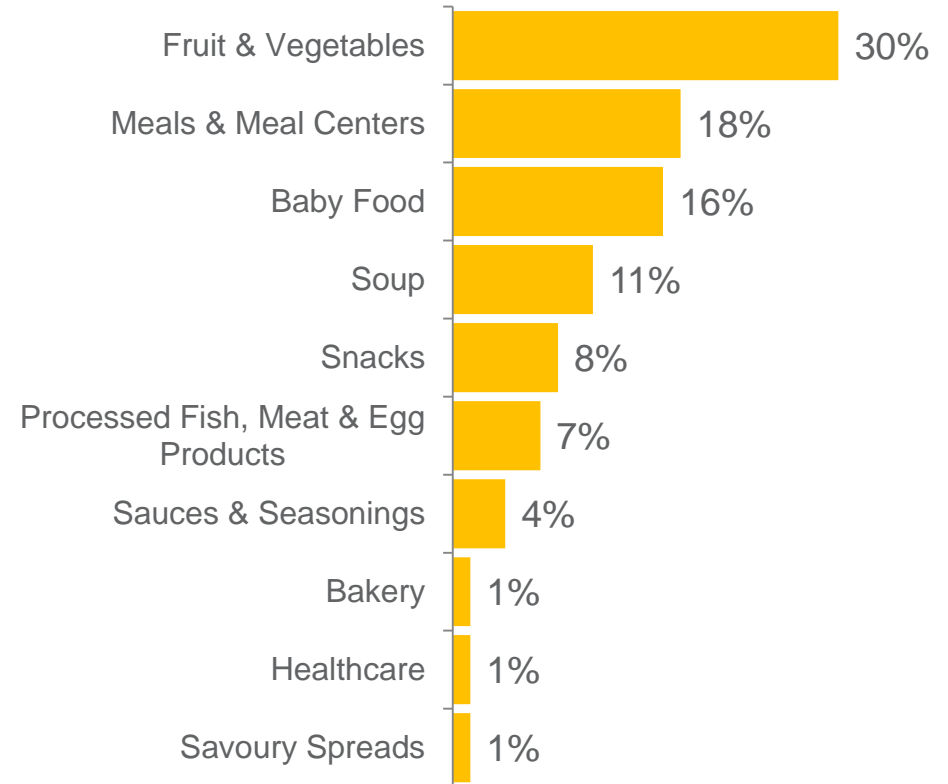
➤➤➤➤➤ The majority of launches occurred in Japan. In the previous wave, USA had the highest number of launches, however only launched 2 products this wave.

The key categories for corn launches are fruits & vegetables, meals, baby food and soups.

Top Launch Countries



Top Launch Categories





**74  
Global  
Launches**



The main claims globally were no additives & preservatives, microwaveable and ease of use. This was relatively consistent in Europe and Asia Pacific.

Flexible packaging is primarily used for sweet corn products, consistent across regions. The most popular pack format used in Europe were skinpack formats.

### Pack Formats Used

Global		Flexible	22%
		Can	18%
		Tray	11%
Asia Pacific		Flexible	23%
		Flexible Satchet	14%
		Can	11%

### Top Claims Used

Global		No Additives/Preservatives	32%
		Microwaveable	31%
		Ease of Use	23%
Asia Pacific		No Additives/Preservatives	39%
		Microwaveable	30%
		Ease of Use	30%

# ▶▶▶ Innovative Sweet Corn Launches: L3M (June – August 2015)

## Lotte Foods Chefood Corn Cream Soup (South Korea)

Lotte Foods Chefood Corn Cream Soup comprises fresh potage soup made with sweet corn, fresh milk and premium cream using the authentic French roux method. It also features croutons made with live yeast and can be ready in just a minute and 30 seconds in the microwave. The product retails in a 188g pack including a spoon.



**Claims:**  
Premium, Time/Speed, Microwaveable

## Kalbe Milna Chicken Soup & Sweet Corn Baby Cereal (Vietnam)

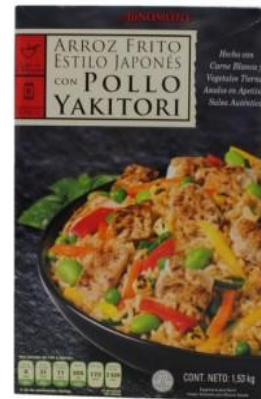
The cereal contains DHA, omega-3 and 6 as essential fatty acids; and features five nutrition sources, nine essential amino acids, 12 vitamins and 10 minerals said to support optimum growth in kids. It also contains iron claimed to prevent and overcome iron deficiency anaemia; and calcium that plays a role in bone formation and maintains bone and teeth density. The halal certified product contains no artificial colors or preservatives, and retails in a 120g pack.



**Claims:**  
Halal, No Additives/Preservatives, Other (Functional), Babies & Toddlers (0-4), Bone Health

## Ajinomoto Yakitori Chicken with Japanese-Style Fried Rice (Mexico)

Ajinomoto Arroz Frito Estilo Japonés (Yakitori Chicken with Japanese-Style Fried Rice) comprises grilled white meat and tender vegetables in an authentic savory sauce. This microwavable product has been inspected by the USDA and retails in a 1.53kg pack, containing 6 x 255g portions.



**Claims:**  
Microwaveable

## Selection Saint Eloi Bio Organic Sweetcorn (France)

Selection Saint Eloi Bio Maïs Doux en Grains Bio (Organic Sweetcorn) has been repackaged. The product can be served in a cold or warm salad and retails in a 340g pack featuring the EU Green Leaf logo.



**Claims:**  
Organic



# ➤➤➤ Innovative Sweet Corn Launches: L3M (June – August 2015)

## Dibaiyi Corn Juice with Collagen (China)

Dibaiyi Jiao Yuan Yu Mi Jiang Yin Liao (Corn Juice with Collagen) has been repackaged in a newly designed 270ml pack. This drink is made with selected high quality fresh sweet corn and processed using fresh pressing technique that maintain the natural nutrition of the corn. It contains greater than or equal to 50% of corn juice and contains 150ml per 100g serve of collagen. According to the manufacturer, collagen contains 18 different amino acids, and is rich in nutrition.



**Claims:**  
No Additives/Preservatives, All Natural Product, Low/No/Reduced Allergen, Convenient Packaging, GMO-Free, Low/No/Reduced Calorie, Gluten-Free, Kosher, Low/No/Reduced Fat, Low/No/Reduced Sugar, Organic, Children (5-12)

## Asahi Odoroki Yasai 1/3 Nichibun No Yasai Vegetable-Rich Corn Soup (Japan)

Asahi Odoroki Yasai 1/3 Nichibun No Yasai Vegetable-Rich Corn Soup is said to contain 1/3 of the daily requirement of vegetables. It retails in a 25.2g pack. Launched on May 25, 2015. RRP not available.



**Claims:**  
NA

## FamilyMart Kodawari Pan Kobo Tearable Ham Corn Danish (Japan)

FamilyMart Kodawari Pan Kobo Tearable Ham Corn Danish features three danish pastries containing ham and topped with mayonnaise and corn. Launched on May 19th 2015 with an RRP of 130 yen.



**Claims:**  
NA

## Frito Lay Doritos Lightly Salted Corn Snack (Japan)

Frito Lay Doritos Lightly Salted Corn Snack is made with sweet corn powder from Hokkaido with naturally sweet flavour, and could be eaten in various ways. It is made with GMO-free corn and retails in a 68g pack that features a Facebook logo. Launched on March 2, 2015 with an RRP of 147 yen.



**Claims:**  
Social Media, GMO-Free

# »»» Innovative Sweet Corn Launches: L3M (June – August 2015)

## McCain Veggie Fingers (India)

McCain Veggie Fingers have been repackaged and are now available in a newly designed pack featuring an FSSAI license number. Described as a veggie delight with corn, carrot and peas, the vegetarian product contains zero cholesterol and is free from trans fat. It is ready in three minutes, can be either fried or baked and retails in a pack featuring a Facebook link.



**Claims:**  
Low/No/Reduced Transfat, Vegetarian,  
Low/No/Reduced Cholesterol, Social Media,  
Time/Speed

## Haiduong Agrexco Frozen American Sweet Corn (Vietnam)

Haiduong Agrexco Ngo Ngot My (Frozen American Sweet Corn) is ideal for frying, making salad, or cooking with other ingredients. This product is made from 100% fresh sweet corn, and retails in a 500g pack.



**Claims:**  
NA

## Svoy Ogorod Corn Cobs (Russia)

Svoy Ogorod Kukuza (Corn Cobs) have been relaunched with a new brand name, formerly sold under the Agrostar brand. This sweet corn is free from GMO, preservatives and sugar. The ready-to-eat product is microwaveable and retails in a 450g pack containing two units.



**Claims:**  
Ease of Use, No Additives/Preservatives,  
GMO-Free, Low/No/Reduced Sugar,  
Microwaveable

## Huu Binh Dragon Force Biet Doi Thep Sweet Corn Snack (Vietnam)

Huu Binh Dragon Force Biet Doi Thep Snack Ngo Ngot (Sweet Corn Snack) has been baked not fried. This ready-to-eat product is targeted at children, and retails in a 48g pack.



**Claims:**  
Ease of Use, Male, Children (5-12)



# Australian Sweet Corn Launches: L3M (June – August 2015)

## Campbell's Country Ladle Chicken and Sweet Corn Soup

Campbell's Country Ladle Chicken and Sweet Corn Soup has been repackaged. It is made with 100% chicken breast, has no added MSG or artificial colours, is 99% fat free and is a source of fibre. The soup now retails in a newly designed 505g recyclable can.



### Claims:

Ease of Use, No Additives/Preservatives, Ethical - Environmentally Friendly Package, Low/No/Reduced Fat, Microwaveable

## Woolworths Select a Taste of Mexico Chicken in Tomato & Corn Salsa

Woolworths Select a Taste of Mexico Chicken in Tomato & Corn Salsa are Mexican seasoned chicken strips in an aromatic tomato sauce with a mild heat level. It retails in a 350g pack providing two servings and featuring a recipe for super quick nachos.



### Claims:

No Additives/Preservatives, Low/No/Reduced Allergen, Low/No/Reduced Saturated Fat, Time/Speed, Microwaveable, Ease of Use, Gluten-Free, Vegetarian

## La Gina La Zuppa South American Style Chicken & Corn Soup

La Gina La Zuppa South American Style Chicken & Corn Soup is now available. The 99% fat free product does not contain gluten or dairy and is described as a delicious chicken and corn soup with authentic South American flavours. It retails in a 200g pack containing two servings.



### Claims:

Ease of Use, Gluten-Free, All Natural Product, Low/No/Reduced Allergen, Low/No/Reduced Fat





# Green Peas.



On average, green peas are purchased approximately four times per month, and consumed around ten times per month.

Green peas are generally purchased from mainstream retailers such as Woolworths and Coles.

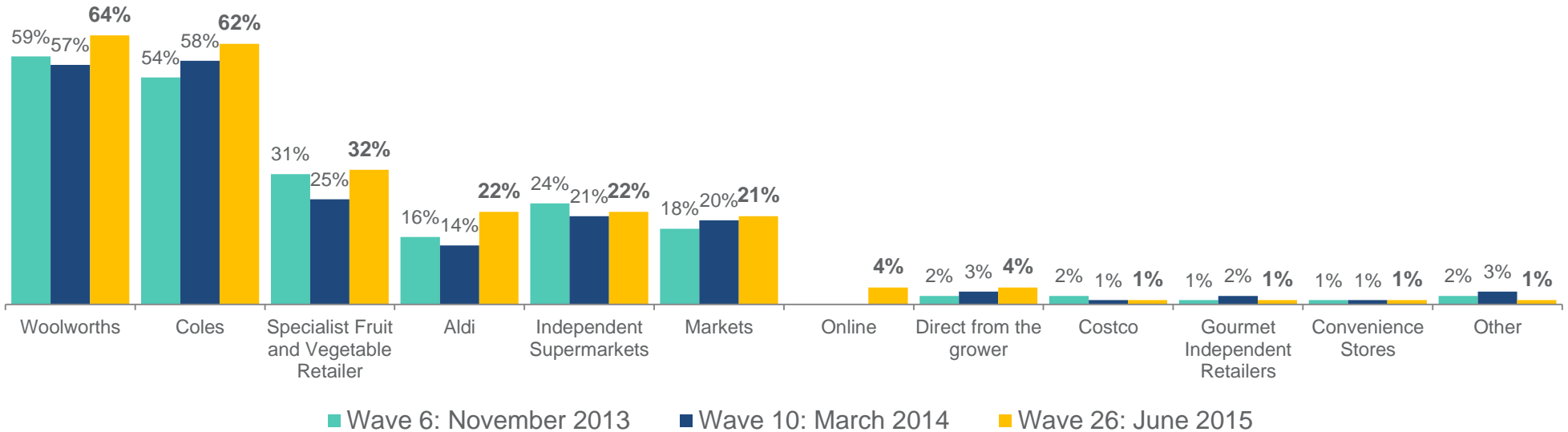


- ▼ 4.0 times, Wave 6
- ▼ 3.9 times, Wave 10



- ▲ 10.5 times, Wave 6
- ▲ 10.2 times, Wave 10

### Purchase Channels



Q1. On average, how often do you purchase green peas?  
 Q2. On average, how often do you consume green peas?  
 Q5. From which of the following channels do you typically purchase green peas?  
 Sample Wave 6 N=339, Wave 10 N=311, Wave 26 N=309





# Average Spend and Price Sensitivity.



Average weight of purchase

The average consumer typically purchases **700g** of green peas, slightly below past waves.

- ▲ 800g, Wave 6
- ▲ 800g, Wave 10



Recalled last spend

Recalled last spend on green peas is **\$4.30**, relatively consistent with previous waves.

- ▲ \$4.35, Wave 6
- ▲ \$4.45, Wave 10



Value for money

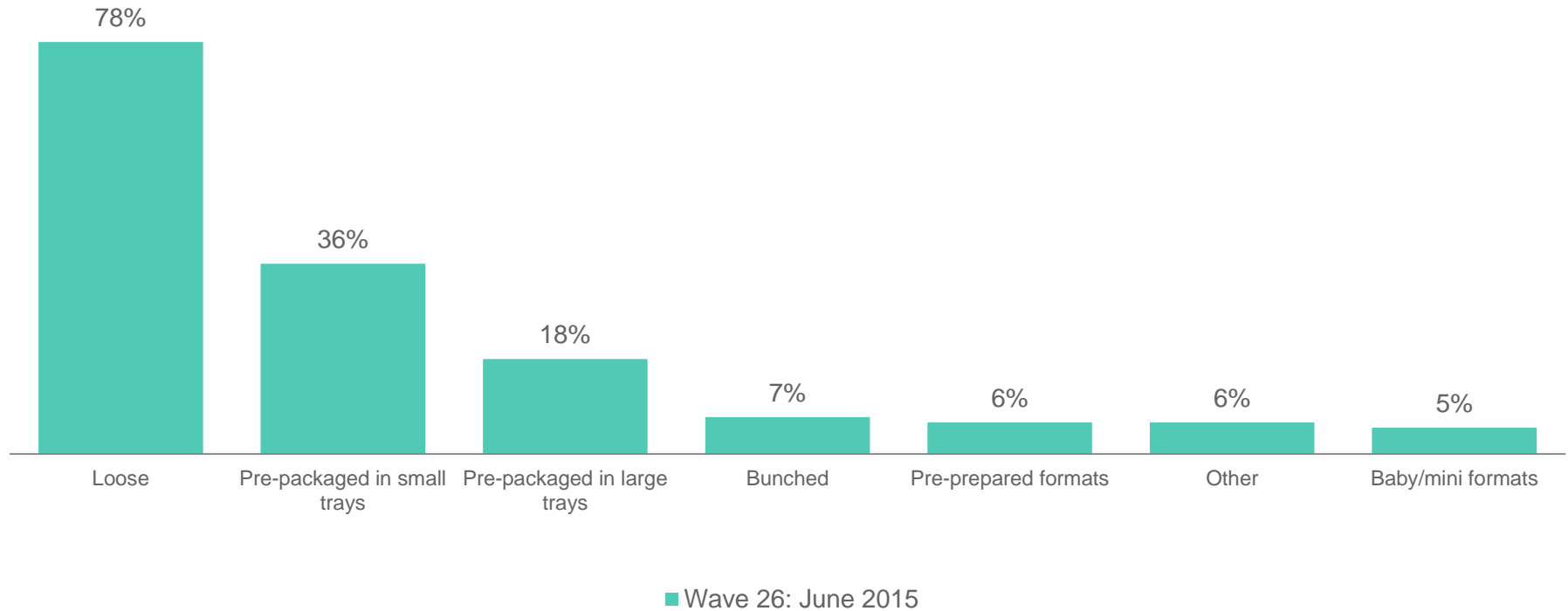
Consumers' perceived value for money is fair for green peas (**6.3/10**), relatively consistent with previous waves.

- 6.3/10, Wave 6
- ▼ 6.2/10, Wave 10

Q3. How much leek do you typically purchase when you shop for it?  
 Q3b. To the best of your memory how much did this cost on your most recent typically purchase?  
 Q4. Please indicate how Poor to Good Value you think this product is? (0-10 scale)  
 Sample Wave 6 N=339, Wave 10 N=311, Wave 26 N=309



Individual green peas are the most common purchase format. Pre-packaged formats both small and large are also typically purchased.

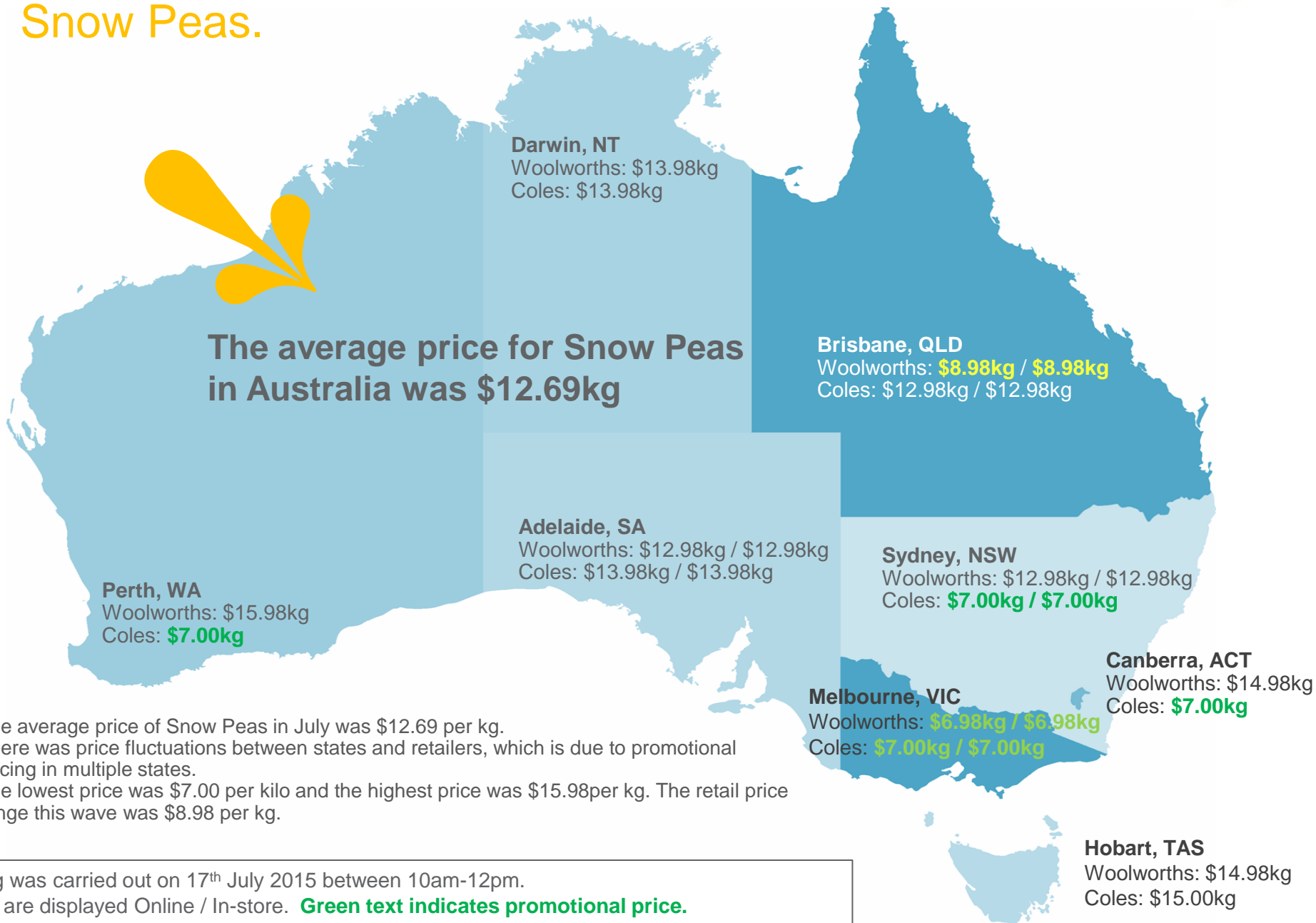


Q4b. In what fresh formats do you typically purchase green peas?  
Sample Wave 6 N=339, Wave 10 N=311, Wave 26 N=309

# Online and In-store Commodity Prices.



## Snow Peas.



- The average price of Snow Peas in July was \$12.69 per kg.
- There was price fluctuations between states and retailers, which is due to promotional pricing in multiple states.
- The lowest price was \$7.00 per kilo and the highest price was \$15.98per kg. The retail price range this wave was \$8.98 per kg.

Pricing was carried out on 17<sup>th</sup> July 2015 between 10am-12pm.  
Prices are displayed Online / In-store. **Green text indicates promotional price.**

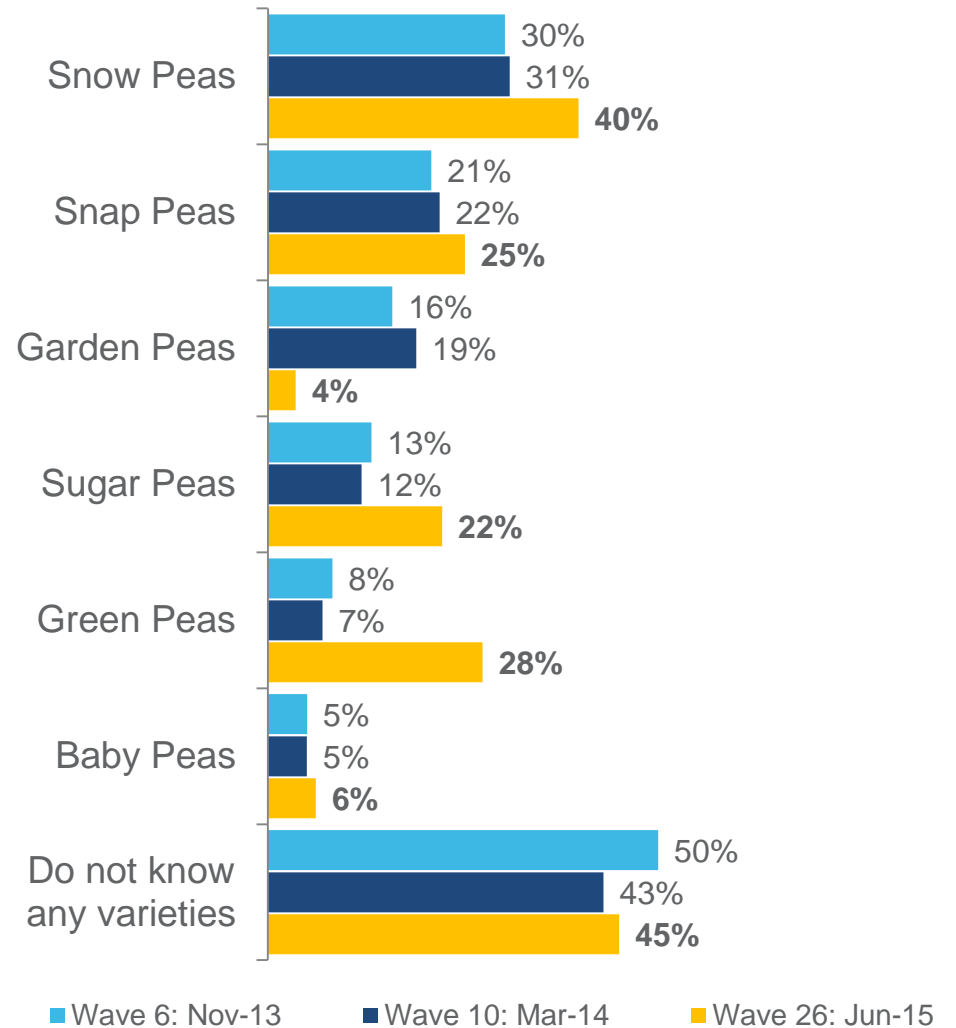


There are greater levels of awareness of types of peas this wave.



Snow Peas and Snap Peas remain the most commonly recalled varieties.

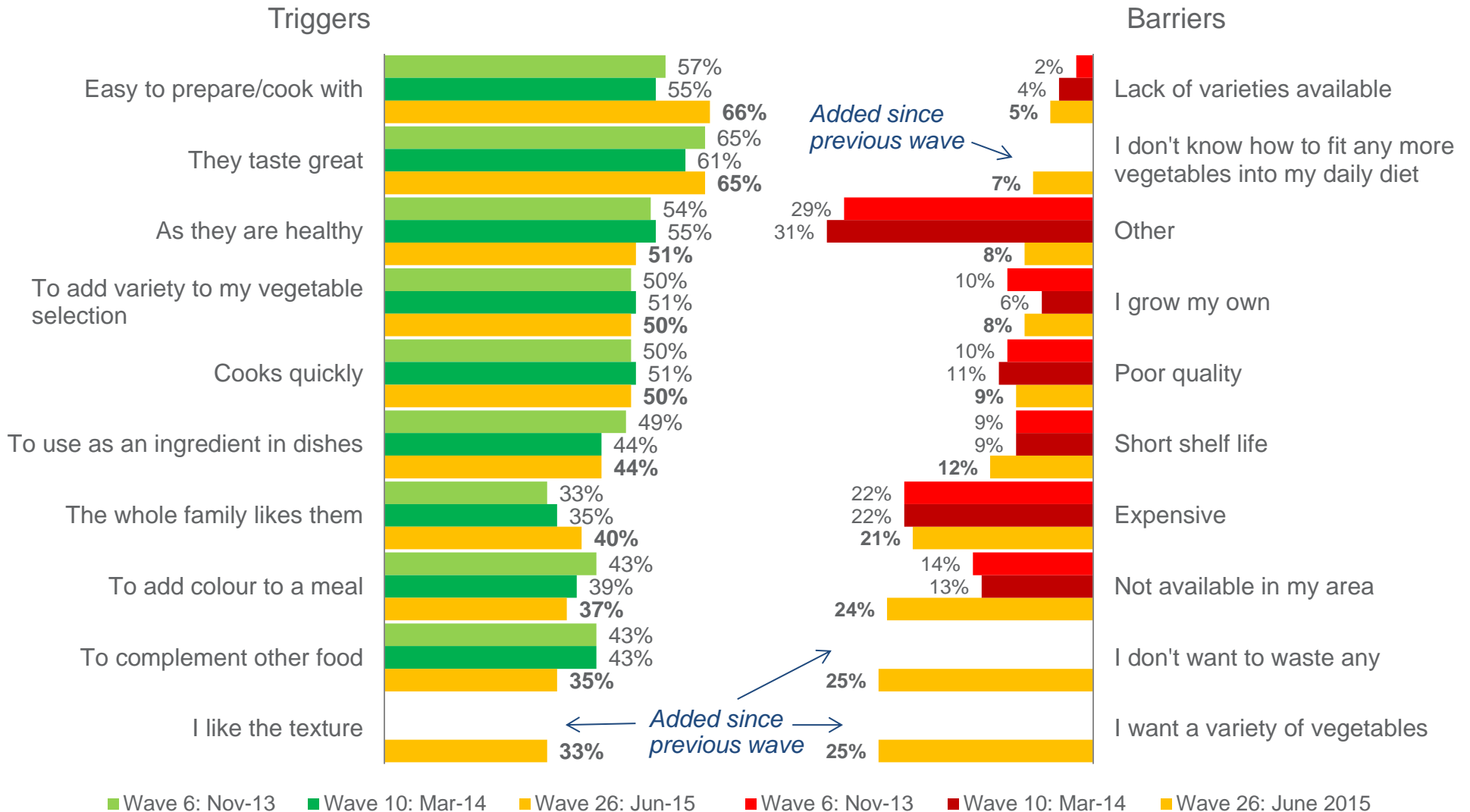
There is still a large proportion of consumers who are unable to recall a type of green pea.



Q6a. What types/varieties of <commodity> are you aware of? (unprompted)  
Sample Wave 6 N=339, Wave 10 N=311, Wave 26 N=309



Ease, taste and health are the key drivers of purchase. In contrast, the key barriers to purchase are wanting a variety of vegetables in their diet and not wanting to waste any.



Q7. Which of the following reasons best describes why you purchase green peas?  
 Q8. Which reason best describes why you don't buy green peas more often?  
 Sample Wave 6 N=339, Wave 10 N=311, Wave 26 N=309





Green pea dishes are most popular in Australian and Chinese cuisine.

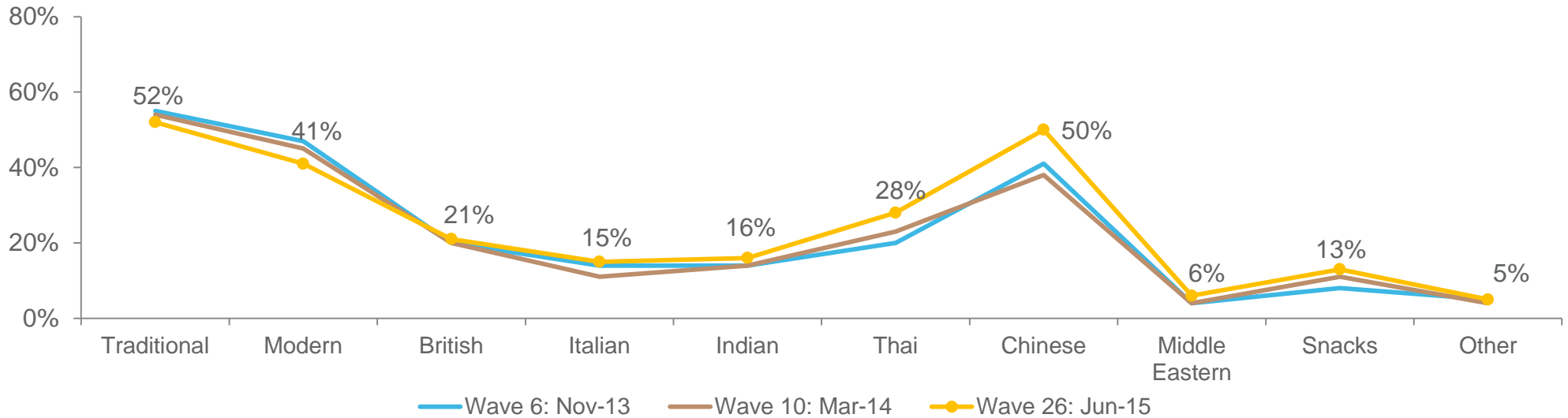
Meal occasions tend to occur during dinner and family meals.

### Top 5 Consumption Occasions



Dinner	74%
Family meals	66%
Weekday meals	52%
Quick meals	50%
Weekend meals	43%

### Typical Cuisine Cooked



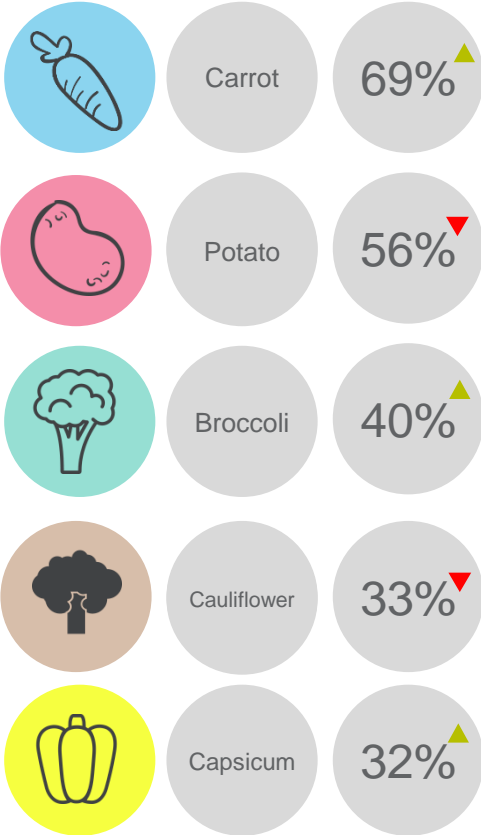
← Australian → ← European → ← Asian → ← Other Cuisines →

Q10. What cuisines do you cook/consume that use green peas?  
 Q11. Which of the following occasions do you typically consume/use green peas?  
 Sample Wave 6 N=339, Wave 10 N=311, Wave 26 N=309



Consumers prefer to serve green peas with carrots and potatoes. Green peas are generally stir fried and steamed, consistent with past waves.

### Accompanying Vegetables

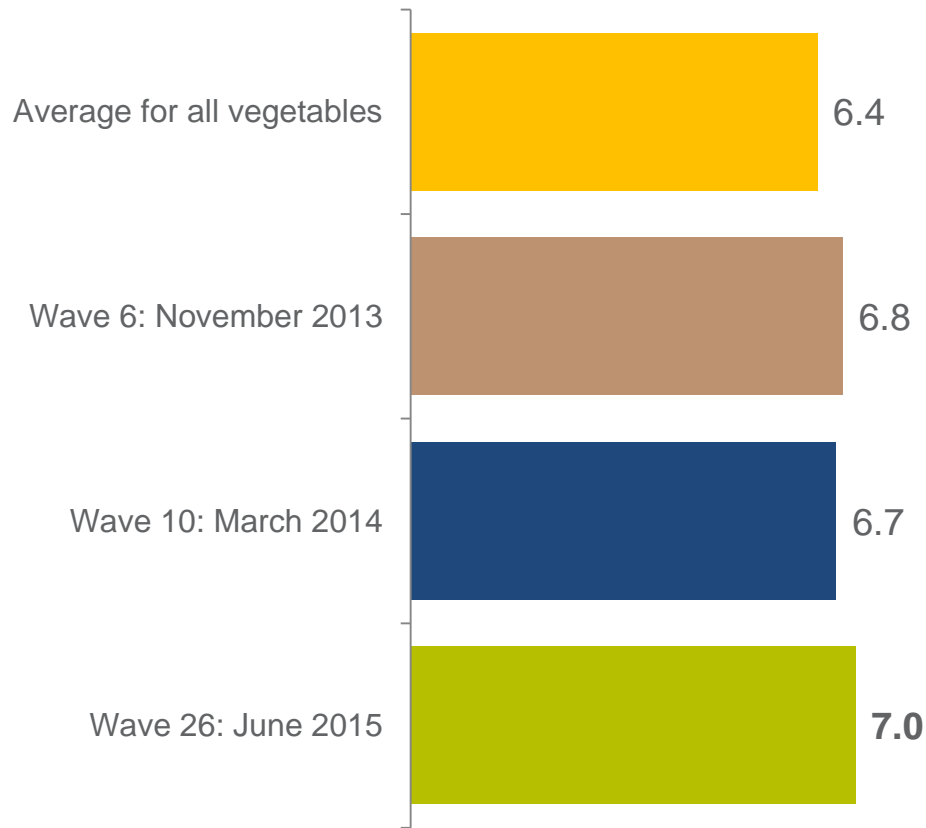


Top 10 Cooking Styles			
	Wave 6	Wave 10	Wave 26
Stir frying	46%	41%	59%
Steaming	44%	50%	49%
Boiling	43%	37%	42%
Raw	26%	23%	32%
Microwave	32%	28%	23%
Soup	17%	13%	20%
Sautéing	6%	9%	14%
Slow Cooking	12%	13%	13%
Frying	4%	6%	9%
Mashing	4%	4%	8%

Q9. How do you typically cook green peas?  
Q10a. And when are you serving green peas which of the following do you also serve together with this?  
Sample Wave 6 N=339, Wave 10 N=311, Wave 26 N=309



Knowing that green peas are grown in Australia is the most important provenance information for consumers.



Q14. When purchasing green peas, how important is Provenance to you?  
Q15. And when purchasing green peas, how important is that it is grown in Australia?  
Sample Wave 6 N=339, Wave 10 N=311, Wave 26 N=309

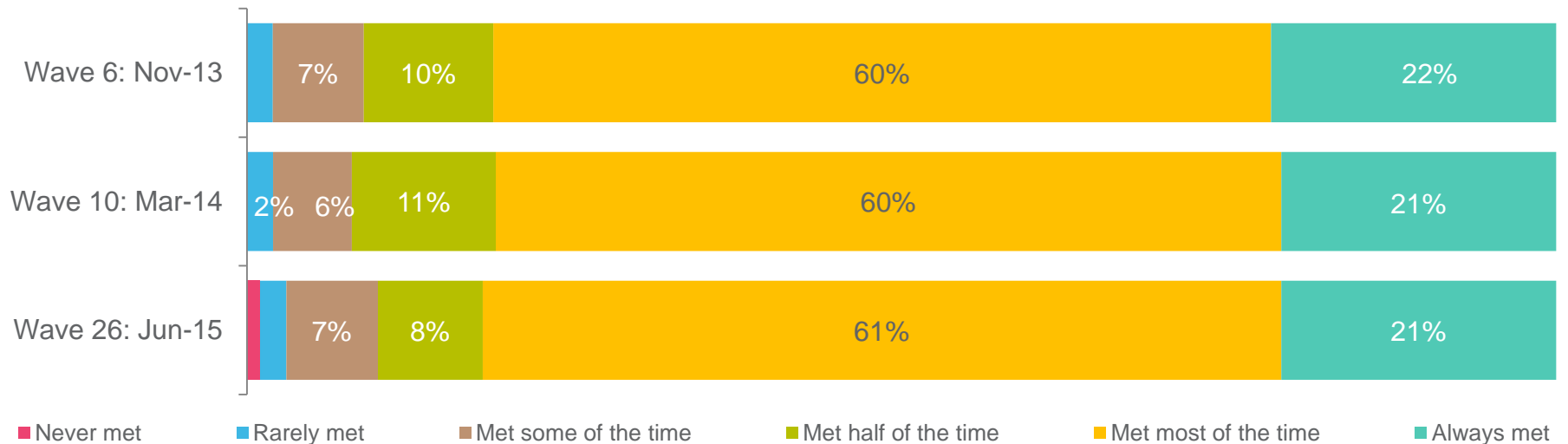


Consumers expect green peas to remain fresh for over a week once purchased, slightly below past waves. This expectation is being met most of the time.

Expected to stay fresh for 9.2 days

- ▲ 9.5 days, Wave 6
- ▲ 10.0 days, Wave 10

### Expectations Met



Q12. How long do you expect green peas to stay fresh for, once you have purchased it?  
 Q13. How often is this length of freshness met when you buy green peas?  
 Sample Wave 6 N=339, Wave 10 N=311, Wave 26 N=309

A close-up photograph of fresh green peas in their pods, with some pods open to reveal the peas. The background is a dense field of green peas. A large, dark grey circle is overlaid in the center of the image, containing the title text.

# Green Peas Product Launch Trends.



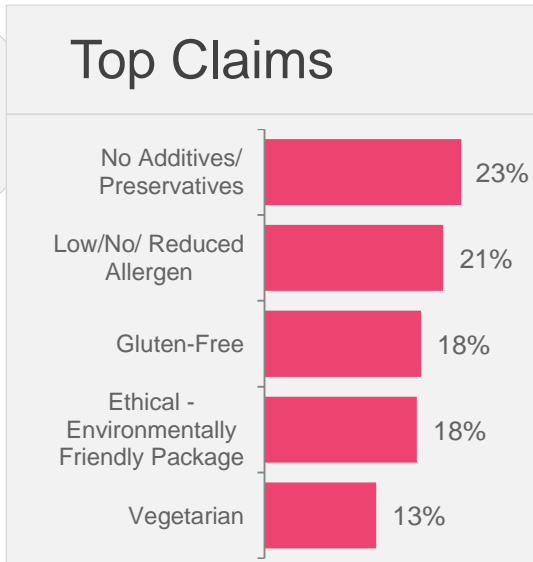
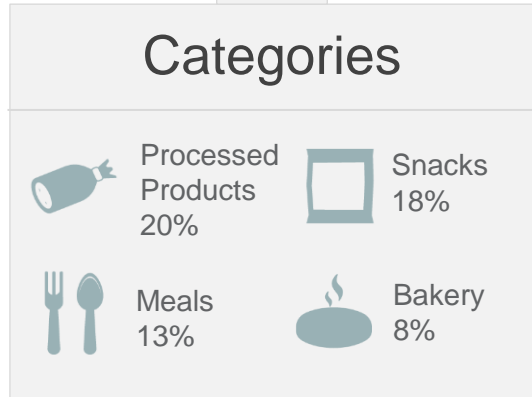
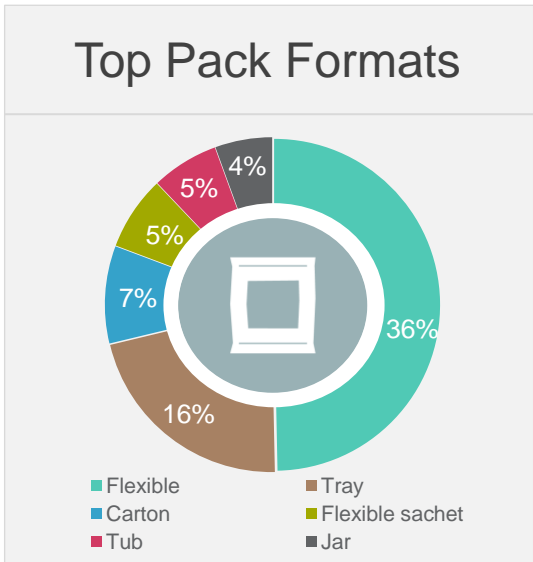
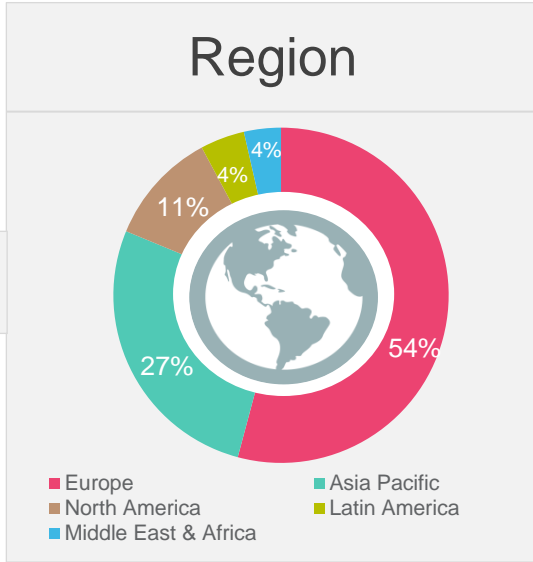
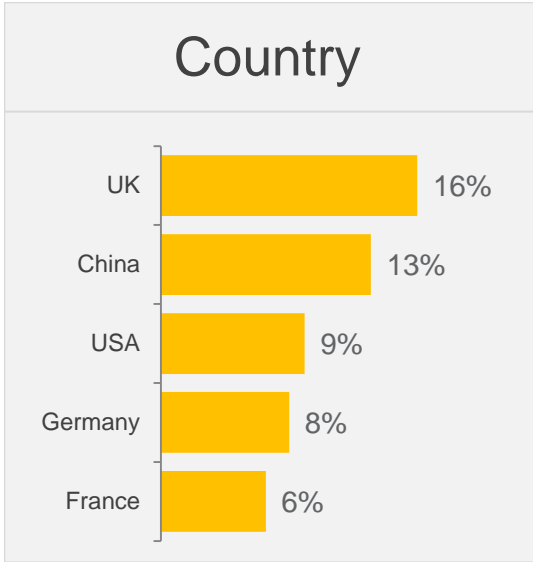
# Green Peas Global Launches

June – August 2015

There were 421 green pea products launched globally over the last three months. The majority of launches were in UK. Categories for launches were processed products and snacks. Key packaging for green pea products was flexible formats.



421 Global NPDs





## Green Peas Product Launches: Last 3 Months (June – August 2015) Summary

- There were 421 launches in the past 3 months globally that contained green peas as an ingredient, compared with 315 products launched in the previous wave.
- There were 14 products launched in Australia over the past three months.
- Europe (54%) and Asia Pacific (27%) were the key regions for launches.
- Flexible packaging (36%) was the most common format used for products.
- The main categories for launches were processed products (20%), snacks (18%) and meals (13%).
- Claims used on products highlighted health; no additives/preservatives (23%), low/no/reduced allergen (21%).
- The most innovative product launched was the mixed vegetable schnitzel from Israel. Examples of these can be found in the following pages.

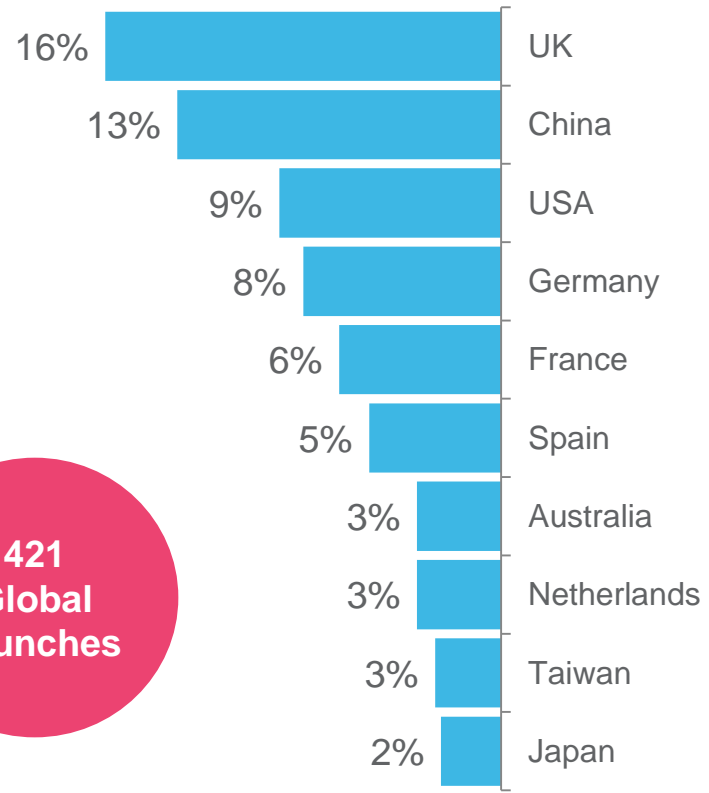


Source: Mintel (2015)

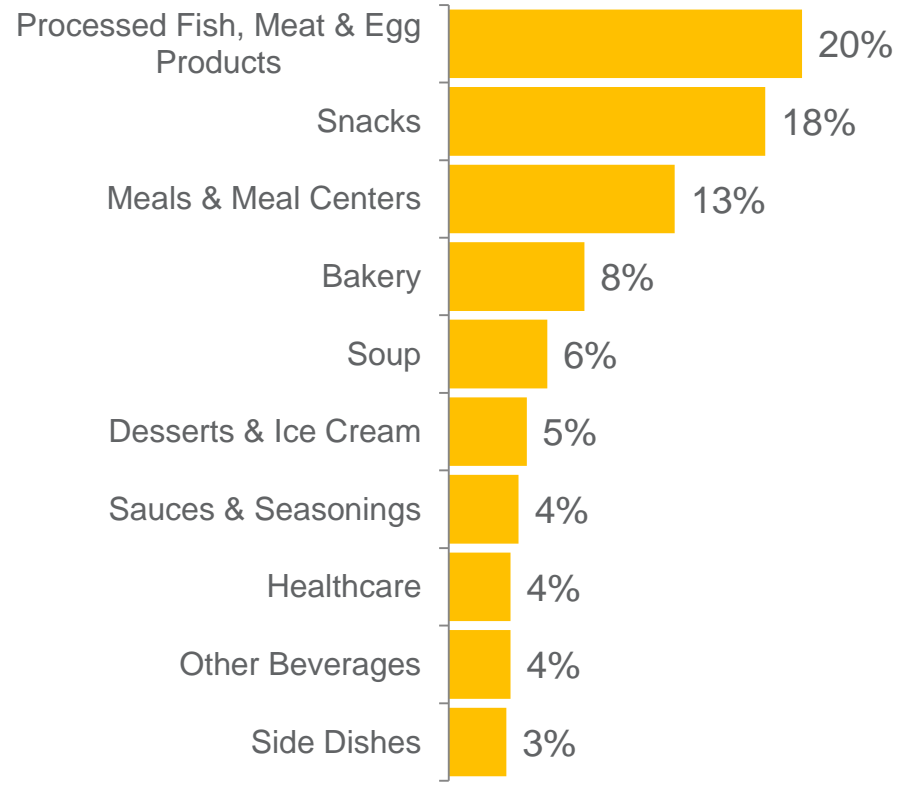
➤➤➤ The majority of launches occurred in UK and China. In the previous wave, the UK only made up for 4% of total launches.

The key categories for green pea launches are processed products, snacks and meals, relatively consistent with the previous wave.

Top Launch Countries



Top Launch Categories












421  
Global  
Launches












The main claims varied between regions, but no additives & preservatives was consistently the number one claim.

Flexible packaging is primarily used for green pea products, consistent across regions. Trays, cartons and tubs are also popular formats.

### Pack Formats Used

Global		Flexible	36%
		Tray	16%
		Carton	7%
Europe		Flexible	30%
		Tray	29%
		Tub	9%
Asia Pacific		Flexible	49%
		Bottle	9%
		Jar	8%

### Top Claims Used

Global		No Additives/Preservatives	23%
		Low/No/Reduced Allergen	21%
		Gluten Free	18%
Europe		No Additives/Preservatives	25%
		Vegetarian	24%
		Ethical - Environmentally Friendly Package	24%
Asia Pacific		No Additives/Preservatives	27%
		Microwaveable	16%
		Time/Speed	16%

Only regions with n >30 are displayed

# »»» Innovative Green Peas Launches: L3M (June – August 2015)

## Meiji Soreike! Anpanman Tezukami Kids Spinach & Green Peas Steamed Cake Mix (Japan)

Meiji Soreike! Anpanman Tezukami Kids Spinach & Green Peas Steamed Cake Mix has been relaunched. It is designed for babies from one year of age, and can be easily prepared in the microwave. The product is rich in iron and calcium, and retails in a 32g pack with 2 x 16g units. Launched in May 2015. RRP not available.



**Claims:**  
Ease of Use, Babies & Toddlers (0-4), Children (5-12), Microwaveable

## Xiang Hui Zao Dian Ha Yi Bei Yan Mai Wu Gu Shu Cai Fen (Oat and Cereal Mixed Vegetable Powder) (China)

Xiang Hui Zao Dian Ha Yi Bei Yan Mai Wu Gu Shu Cai Fen (Oat and Cereal Mixed Vegetable Powder) is now available. This product retails in a 120g pack containing four 30g units.



**Claims:**  
NA

## Atkins Penne Pasta (UK)

Atkins Penne Pasta, previously available under the Atkins Cuisine brand, has been relaunched in a newly designed 250g pack. This product contains 70% less carbs than regular pasta, and is high in protein and fibre.



**Claims:**  
High/Added Fiber, High Protein, Slimming, Low/No/Reduced Carb

## Hortex Stir-Fry Vegetables with Italian Seasoning (Russia)

Hortex Ovoshchi dlya Zharki s Pripravoy Po-Ital'yanski (Stir-Fry Vegetables with Italian Seasoning) have been repackaged with an updated design. The product retails in a 400g pack.



**Claims:**  
NA



# »»» Innovative Green Peas Launches: L3M (June – August 2015)

## Tapugan Teva Mixed Vegetable Schnitzel (Israel)

Tapugan Teva Mixed Vegetable Schnitzel is cholesterol-free. This kosher certified product retails in a 750g pack.



**Claims:**  
Kosher, Low/No/Reduced Cholesterol

## Hälsans Kök Grilled Vegetarian Pieces (Sweden)

Hälsans Kök Grillade Vegobitar (Grilled Vegetarian Pieces) are made from a blend of soy and wheat protein. This product is suitable for ovo-vegetarians and retails in a 175g pack featuring the Facebook logo.



**Claims:**  
No Animal Ingredients, Social Media, Vegetarian, Vegan, Microwaveable

## Deutsche Küche Garlic Sage Spätzle (USA)

Deutsche Küche Garlic Sage Spätzle is imported from Germany and described as pasta in a garlic, sage & butter sauce with mozzarella cheese. The product can be microwaved and retails in a 10.9-oz. pack.



**Claims:**  
Microwaveable

## Pharmanex AgeLoc TR90 Chocolate Trimshake (USA)

Pharmanex AgeLoc TR90 Chocolate Trimshake is an essential part of the Ageloc TR90 weight management and body shaping system designed to promote a leaner and younger look. This gluten-free product retails in a 1.92-lbs. pack that sufficient for 30 servings.



**Claims:**  
Low/No/Reduced Lactose, No Additives/Preservatives, All Natural Product, Low/No/Reduced Allergen, Slimming, Weight & Muscle Gain, Gluten-Free, Vegetarian, Premium

# ➤➤➤ Innovative Green Peas Launches: L3M (June – August 2015)

## Marks & Spencer Apple, Pea, Lime & Mint Juice (UK)

Marks & Spencer Apple, Pea, Lime & Mint Juice provides two of the five a day. The vegetarian product comprises a pasteurised drink with apple and lime juice with banana and pea purées. It is high in vitamin C, which is important for healthy skin, blood and bones. The product retails in a 750ml bottle featuring the Eat Well logo.



**Claims:**  
Other (Functional), Vegetarian, Ethical - Environmentally Friendly Package, Cardiovascular (Functional), Bone Health

## Deli Choice Stuffed Chicken Slices (UK)

Deli Choice Stuffed Chicken Slices are slices of formed cooked chicken with a pork and sage stuffing centre with added starch and milk proteins. The premium product retails in a 120g pack containing four slices and featuring the Red Tractor logo.



**Claims:**  
Premium

## Qi Xiu Quan / Qixiuquan Five Grains Aged Vinegar (China)

Qi Xiu Quan / Qixiuquan Wu Liang Chen Cu (Five Grains Aged Vinegar) is made using selected five grains and processed according to soaking and drying fermentation techniques. This product is said to be aromatic and mellow, and retails in a 420ml pack.



**Claims:**  
NA

## Poompuksa Butterfly Pea Herbal Hair Mask Treatment (Thailand)

Poompuksa Butterfly Pea Herbal Hair Mask Treatment is enriched with an organic ingredient as well as butterfly pea extract, soap berry, vitamin E, provitamin B5 and olive oil. It is said to keep hair dark, shiny, soft, smooth and looking healthy and good. The rinse-out product retails in a 300g pack.



**Claims:**  
Botanical/Herbal, Organic, Vitamin/Mineral Fortified, Brightening / Illuminating



# Australian Green Peas Launches: L3M (June – August 2015)

## Heinz Soup of the Day Green Pea with Ham Soup

Heinz Soup of the Day Green Pea with Ham Soup is described as a fresh look at an old favourite. The soup is made with chopped, gently simmered and carefully combined quality ingredients. The goodness and flavour are locked in a foil fresh pack so that there is no need for preservatives. This microwaveable soup does not contain any artificial flavours or artificial colours and can be enjoyed at home or at work. The 99% fat free product contains two vegetable servings per pack and retails in a 430g pouch.



**Claims:**

No Additives/Preservatives, Seasonal, On-the-Go, Low/No/Reduced Fat, Microwaveable

## Wellaby's Heavenly Sea Salt Lentil Chips

Wellaby's Heavenly Sea Salt Lentil Chips are free from gluten, wheat, MSG, nuts and GMO. This product retails in a 140g pack.



**Claims:**

No Additives/Preservatives, Low/No/Reduced Allergen, GMO-Free, Gluten-Free

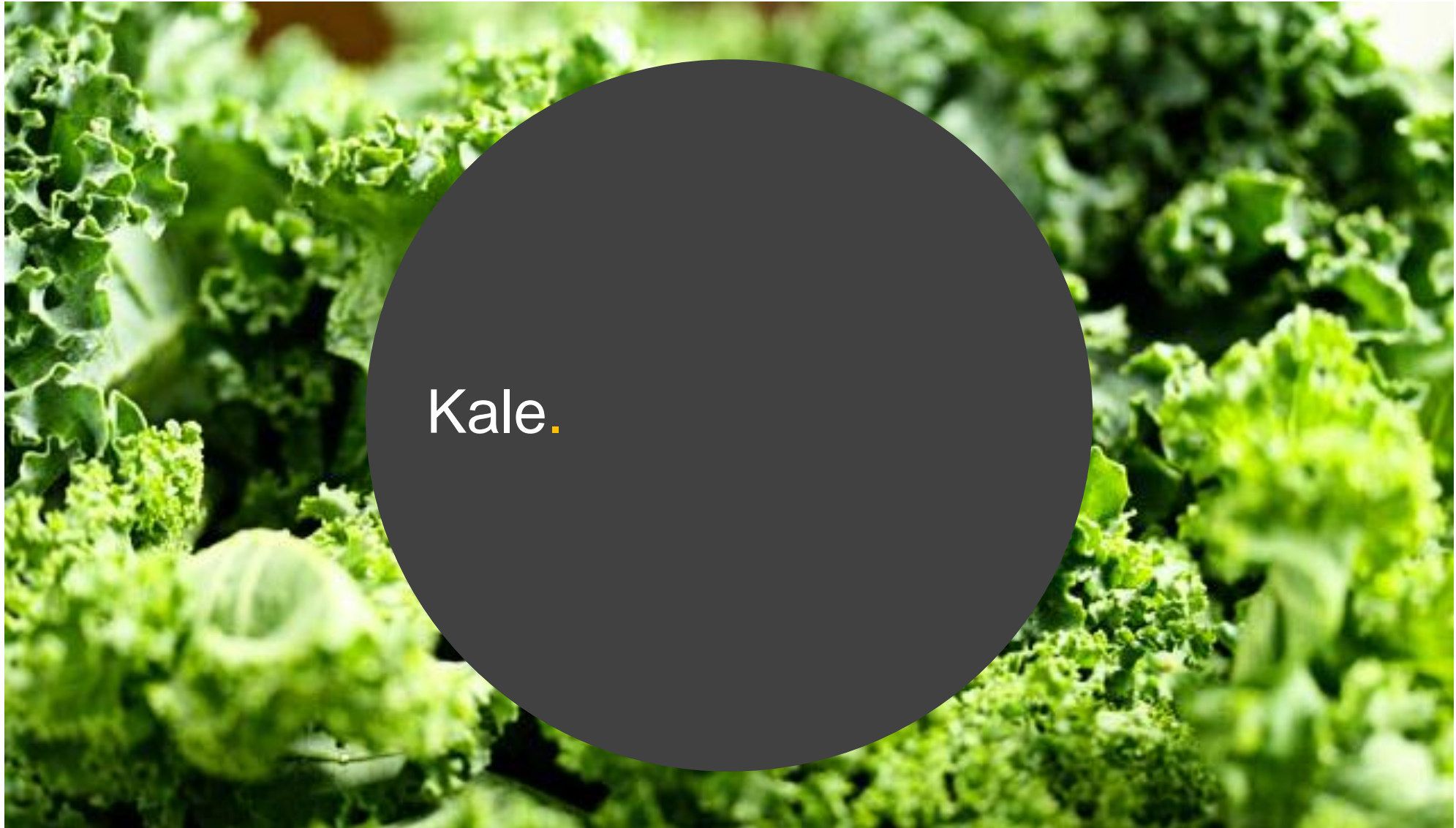
## Campbell's Chunky Roast Chicken & Vegetable Soup

Campbell's Chunky Roast Chicken & Vegetable Soup has been relaunched with a new brand, having previously been available under the Campbell's Chunky brand. It is made with 100% Aussie chicken breast, contains no added MSG, is 98% fat free, and comprises more than two servings of vegetables in every can. This microwaveable product is ready to serve and now retails in a newly designed 505g recyclable can.



**Claims:**

Ease of Use, No Additives/Preservatives, Ethical - Environmentally Friendly Package, Low/No/Reduced Fat, Microwaveable



Kale.





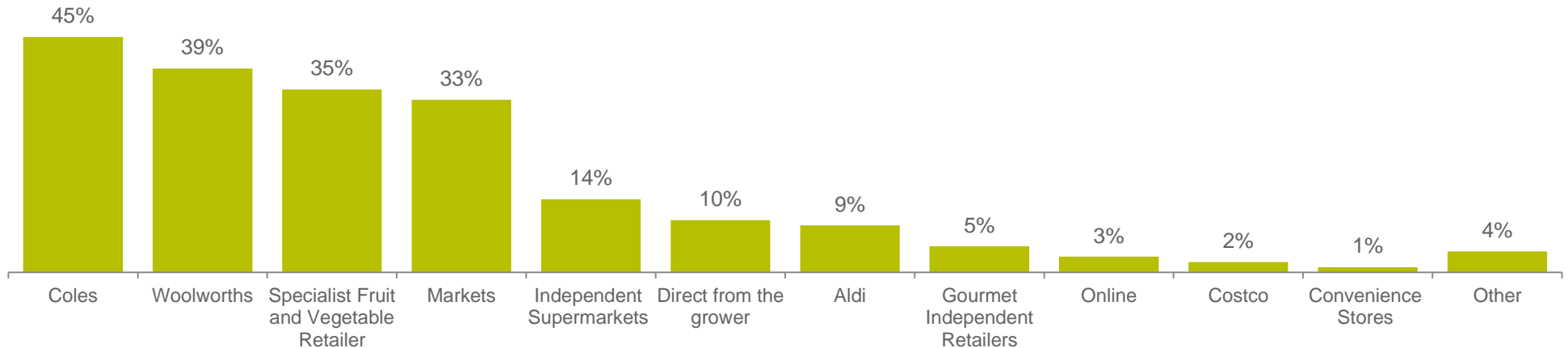


On average, kale is purchased four times per month, and is consumed around nine times per month.

Kale is purchased through a variety of channels including mainstream retailers, specialist retailers and markets.



### Purchase Channels



■ Wave 25: May-15

Q1. On average, how often do you purchase kale?  
 Q2. On average, how often do you consume kale?  
 Q5. From which of the following channels do you typically purchase kale?  
 Sample Wave 26 N=200



Kale is perceived as good value for money, with consumers' recalled last spend at \$4.60.



Average weight of purchase

The average consumer typically purchases **700g** of kale.



Recalled last spend

Recalled last spend on kale is **\$4.60**.



Value for money

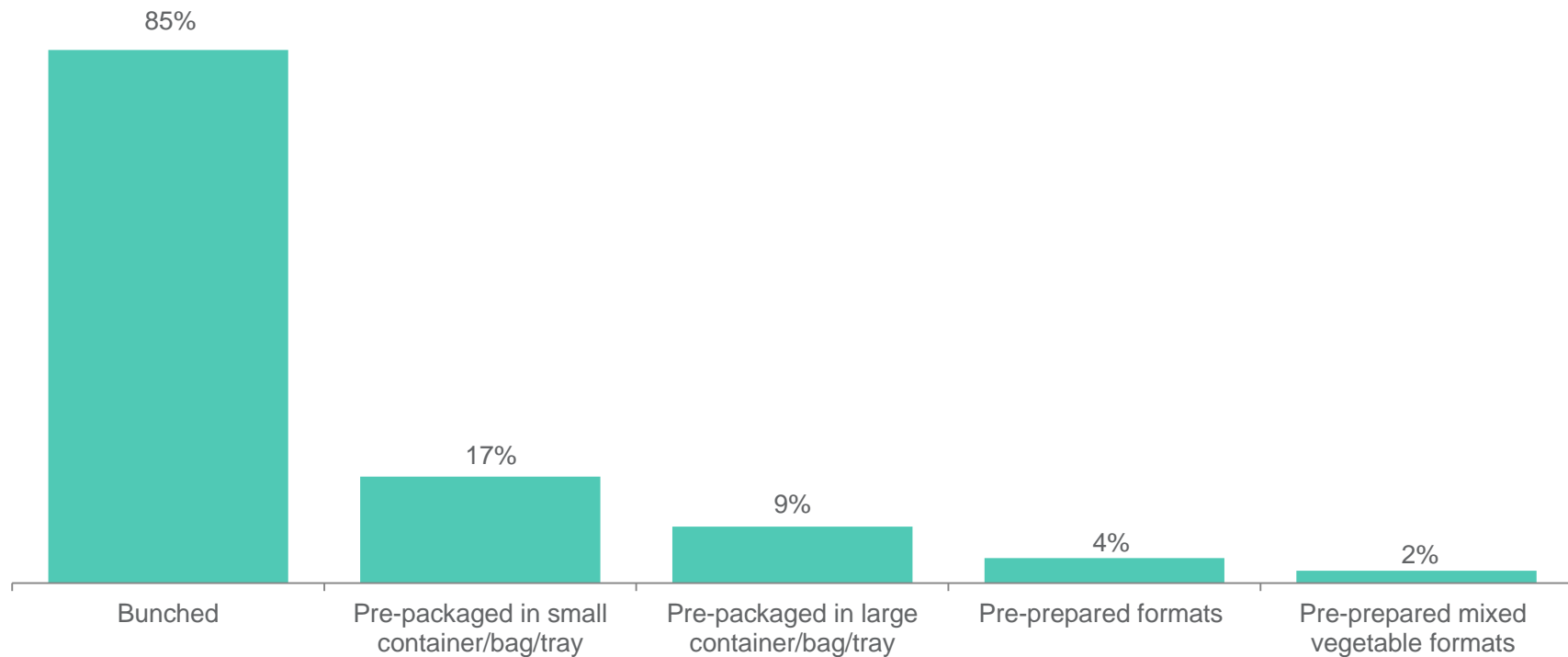
Consumers' perceived kale to be good value for money (**6.5/10**).

Q3. How much kale 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 26 N=200





Bunched kale is the most common purchase format. Other options which are purchased include various pre-packaged and pre-prepared formats.

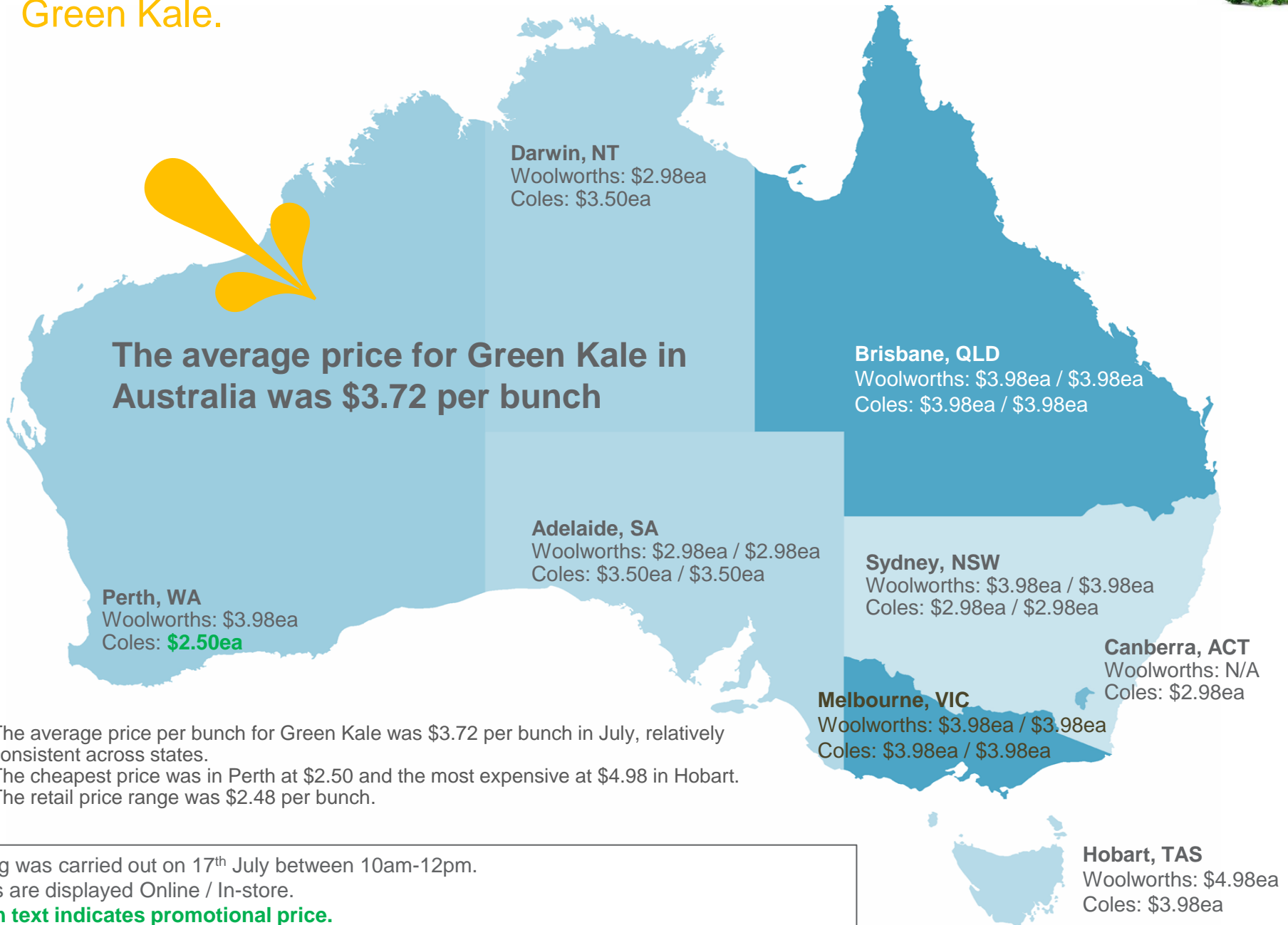


Q4b. In what fresh formats do you typically purchase kale?  
Sample Wave 26 N=200



# Online and In-store Commodity Prices.

## Green Kale.



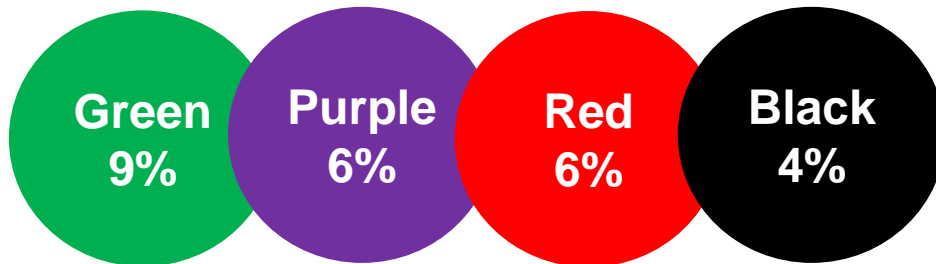
- The average price per bunch for Green Kale was \$3.72 per bunch in July, relatively consistent across states.
- The cheapest price was in Perth at \$2.50 and the most expensive at \$4.98 in Hobart.
- The retail price range was \$2.48 per bunch.

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

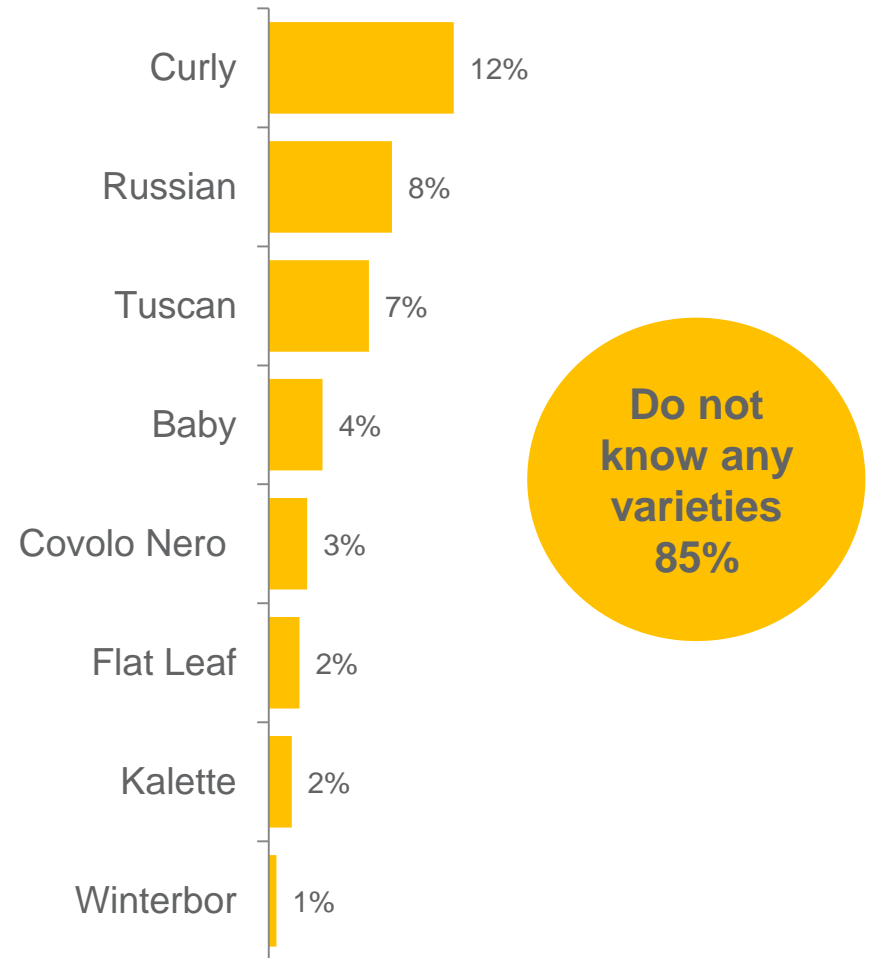


Awareness of types of kale are very low, with 85% of consumers unable to recall a type.

Curly Leaf and Russian are the most recalled forms of kale.



Colour recall for kale types

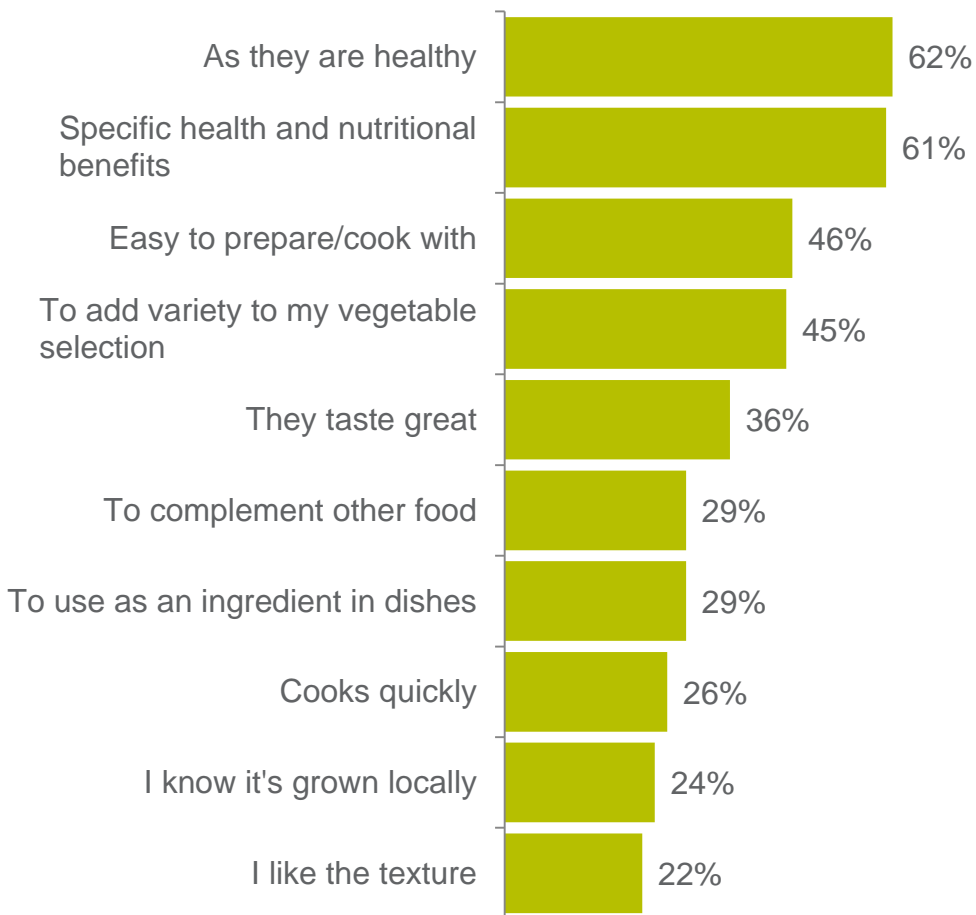


Wave 26: Jun-15

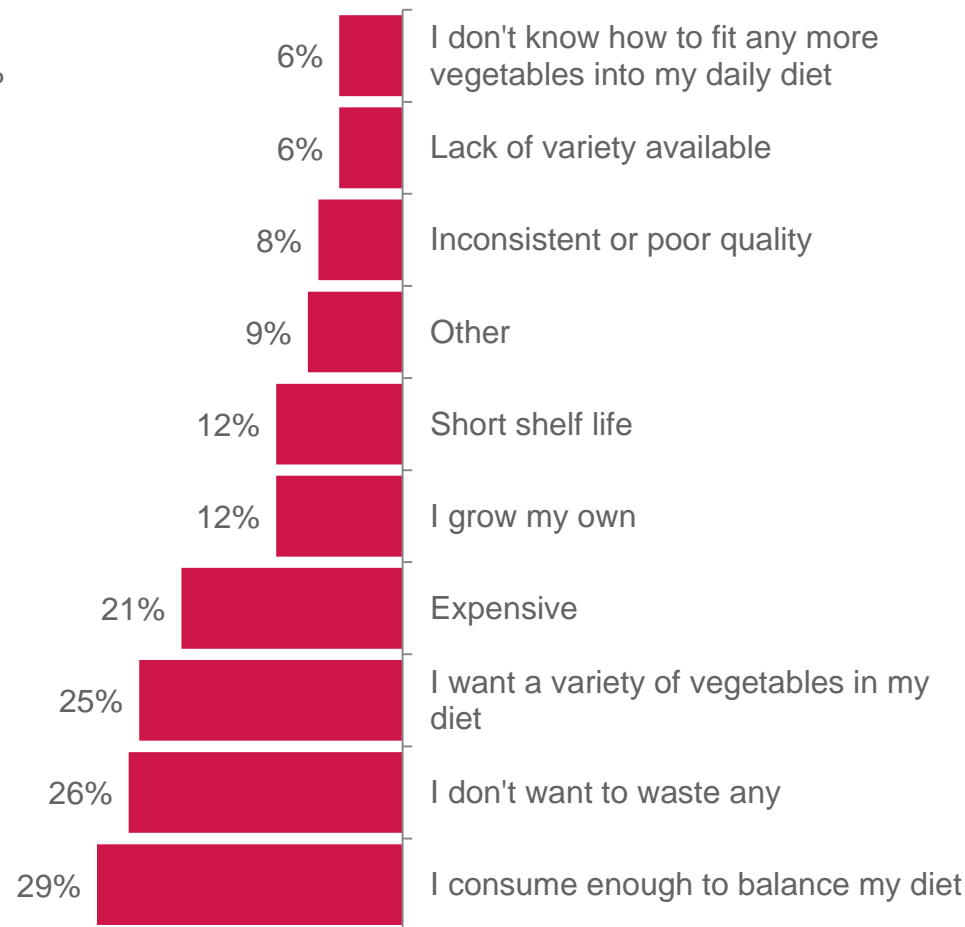


The key drivers of purchase for kale are health related as kale has specific health and nutritional benefits. In contrast, already consuming enough to balance their diet and not wanting to waste any are the key barriers to purchase.

### Triggers



### Barriers



Q7. Which of the following reasons best describes why you purchase kale?  
Q8. Which reason best describes why you don't buy kale more often?  
Sample Wave 26 N=200



Australian and Chinese cuisine are popular for kale dishes.

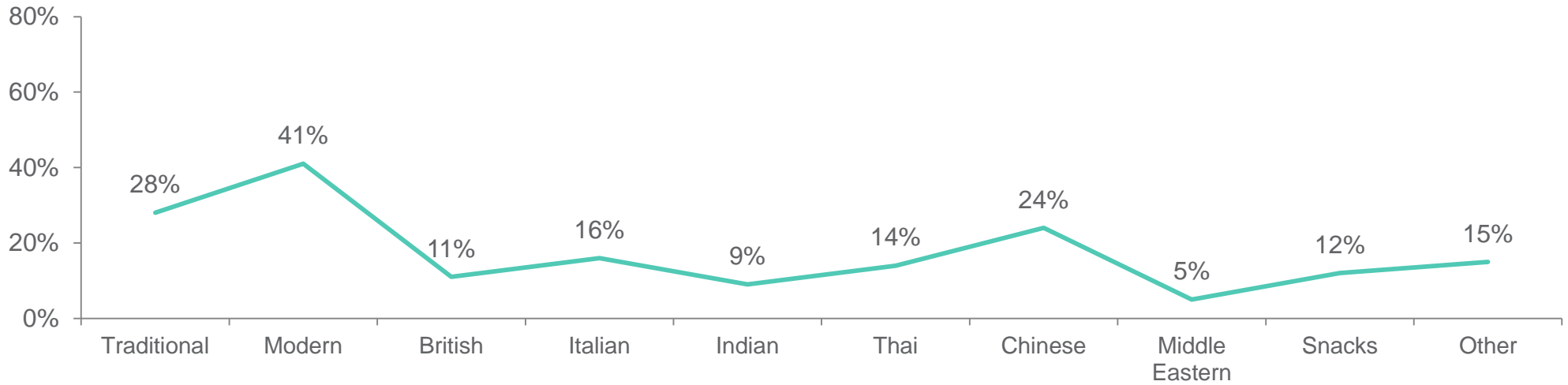
Meal occasions tend to occur during dinner and family meals.

### Top 5 Consumption Occasions



Dinner	57%
Family meals	46%
Weekday meals	36%
Quick meals	31%
Weekend meals	31%

### Typical Cuisine Cooked



— Wave 26: Jun-15

← Australian → ← European → ← Asian → ← Other Cuisines →

Q10. What cuisines do you cook/consume that use kale?  
 Q11. Which of the following occasions do you typically consume/use kale?  
 Sample Wave 26 N=200

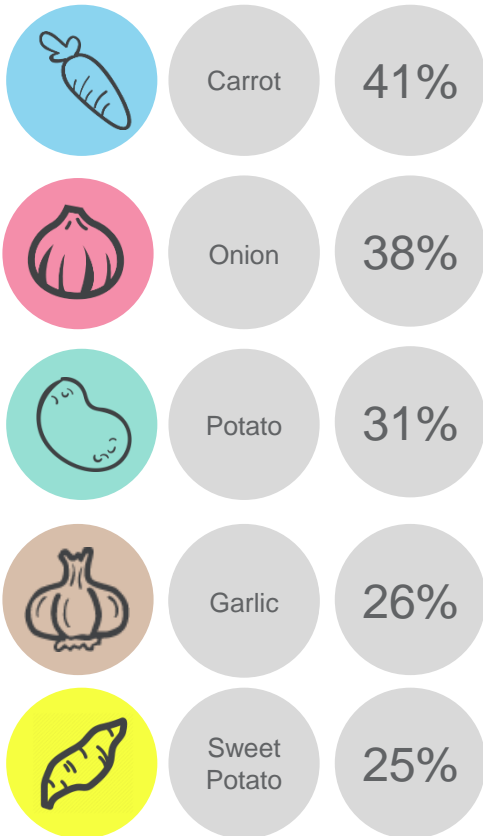


▼: Indicates LOWER score than current wave.  
 ▲: Indicates HIGHER score than current wave.



Consumers prefer to use kale mainly with carrots, onions and potatoes. Kale is generally cooked in stir fries and steamed. Eating it raw is also a popular option.

Accompanying Vegetables



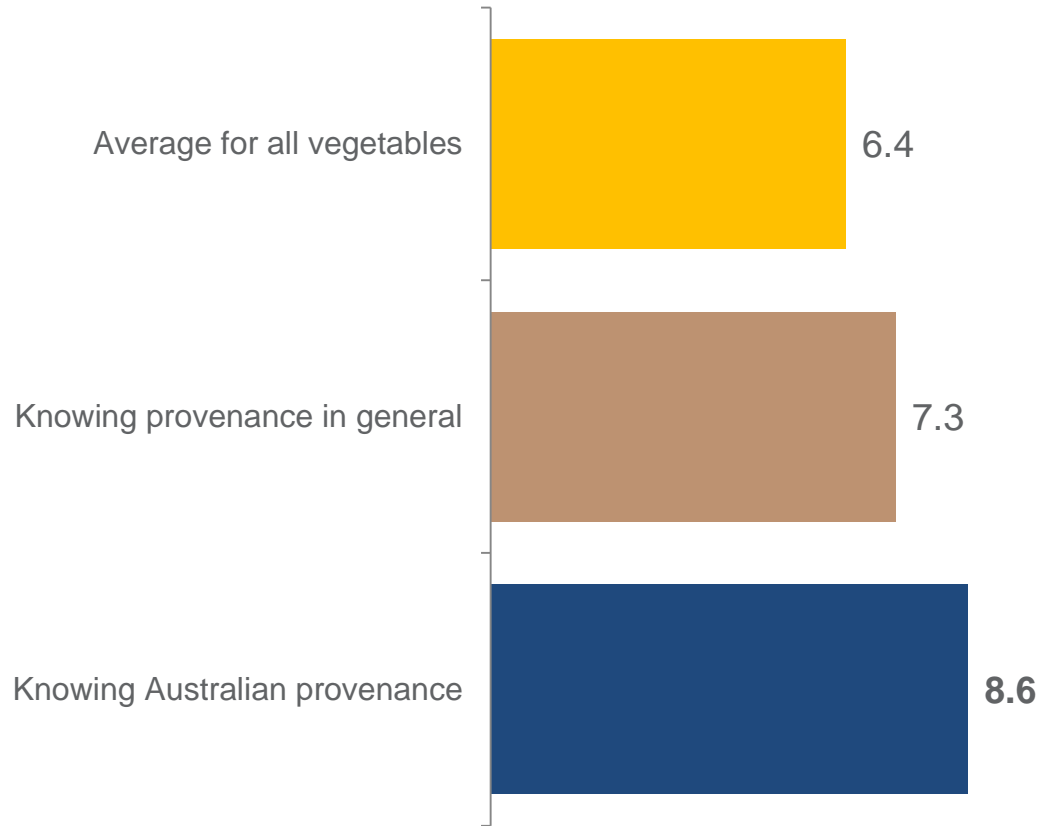
Top 10 Cooking Styles	
	Wave 26
Stir frying	42%
Steaming	34%
Raw	26%
Saut�eing	22%
Soup	21%
Boiling	19%
Frying	11%
Baking	10%
Other	10%
Roasting	10%

Q9. How do you typically cook kale?  
Q10a. And when are you serving kale which of the following do you also serve together with this?  
Sample Wave 26 N=200





Knowing that Kale is grown in Australia is the most important provenance information for consumers.



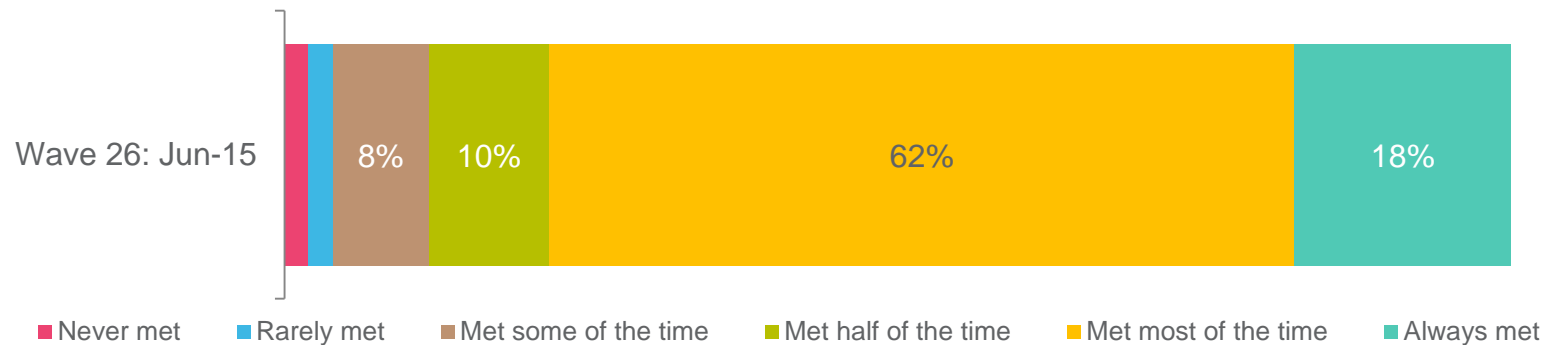
Q14. When purchasing kale, how important is Provenance to you?  
Q15. And when purchasing Kale, how important is that it is grown in Australia?  
Sample Wave 26 N=200



Consumers expect kale to remain fresh for just under a week once purchased, which is being met most of the time.

Expected to stay fresh for 6.1 days

### Expectations Met



Q12. How long do you expect kale to stay fresh for, once you have purchased it?  
Q13. How often is this length of freshness met when you buy kale?  
Sample Wave 26 N=200

A close-up photograph of fresh green kale leaves, showing their characteristic curly texture. A large, dark grey circle is overlaid in the center of the image, containing the title text.

# Kale Product Launch Trends.

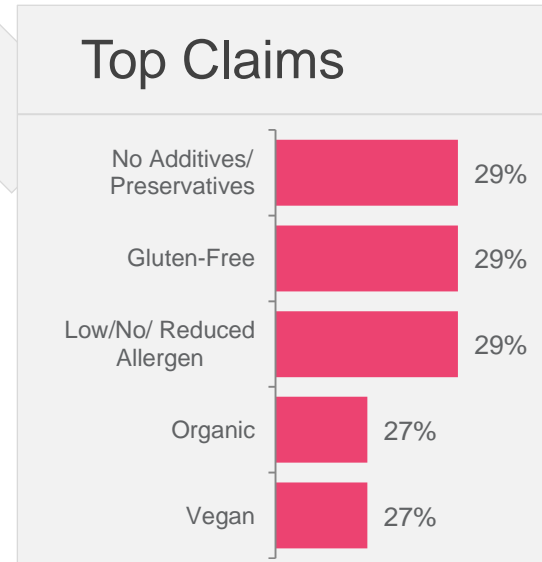
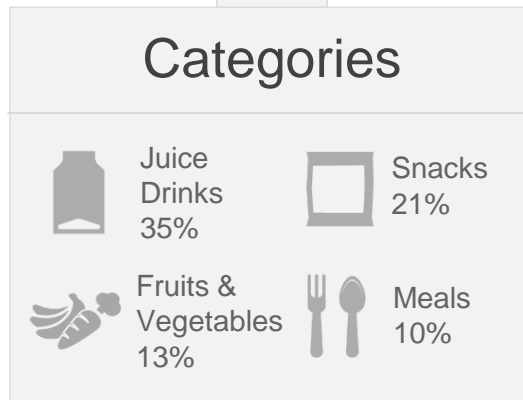
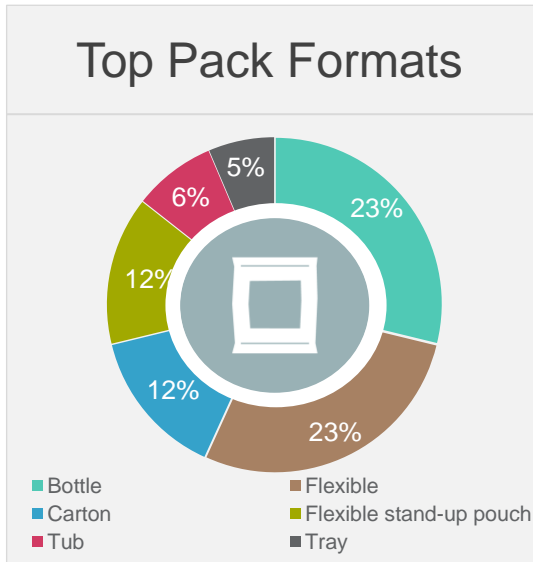
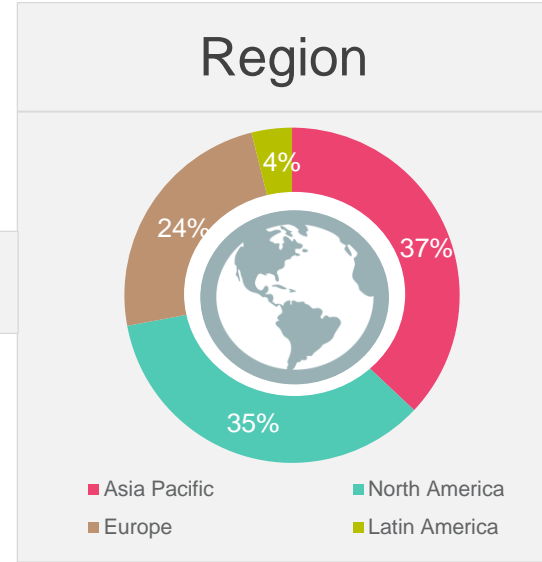
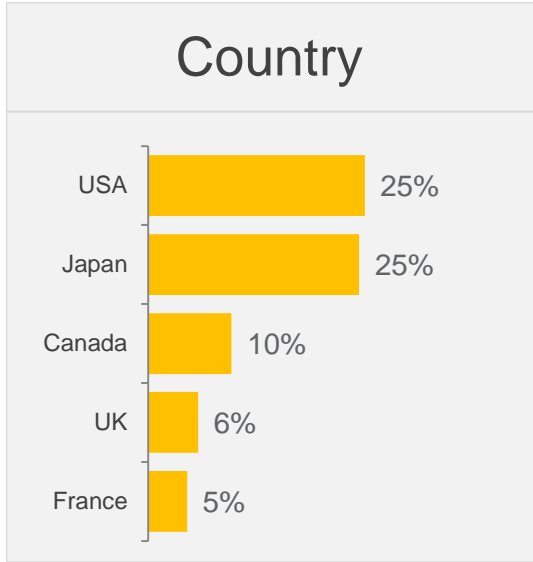
# Kale Global Launches

## June – August 2015

There were 154 kale products launched globally over the last three months. The majority of launches were in USA and Japan. Categories for launches were juice drinks and snacks. Key packaging for kale products were in bottles and flexible packaging.



154 Global NPDs



## Kale Product Launches: Last 3 Months (June – August 2015) Summary

- There were 154 launches in the past 3 months globally that contained kale as an ingredient.
- There were 4 products launched in Australia over the past three months.
- Asia Pacific (37%) and Europe (35%) were the key regions for launches.
- Bottles (23%) and flexible packaging (23%) was the most common format used for products.
- The main categories for launches were juice drinks (35%), snacks (21%) and fruits & vegetables (13%).
- Claims used on products highlighted health; no additives/preservatives (29%), gluten free (29%) and low/no/reduced allergen (29%).
- The most innovative product launched was a green smoothie sorbet in Germany. Examples of these can be found in the following pages.



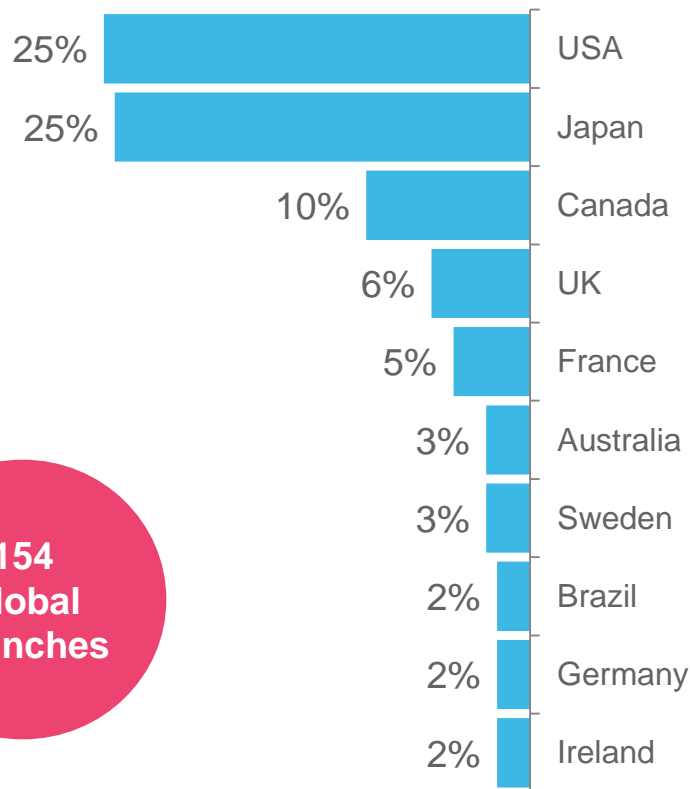
Source: Mintel (2015)



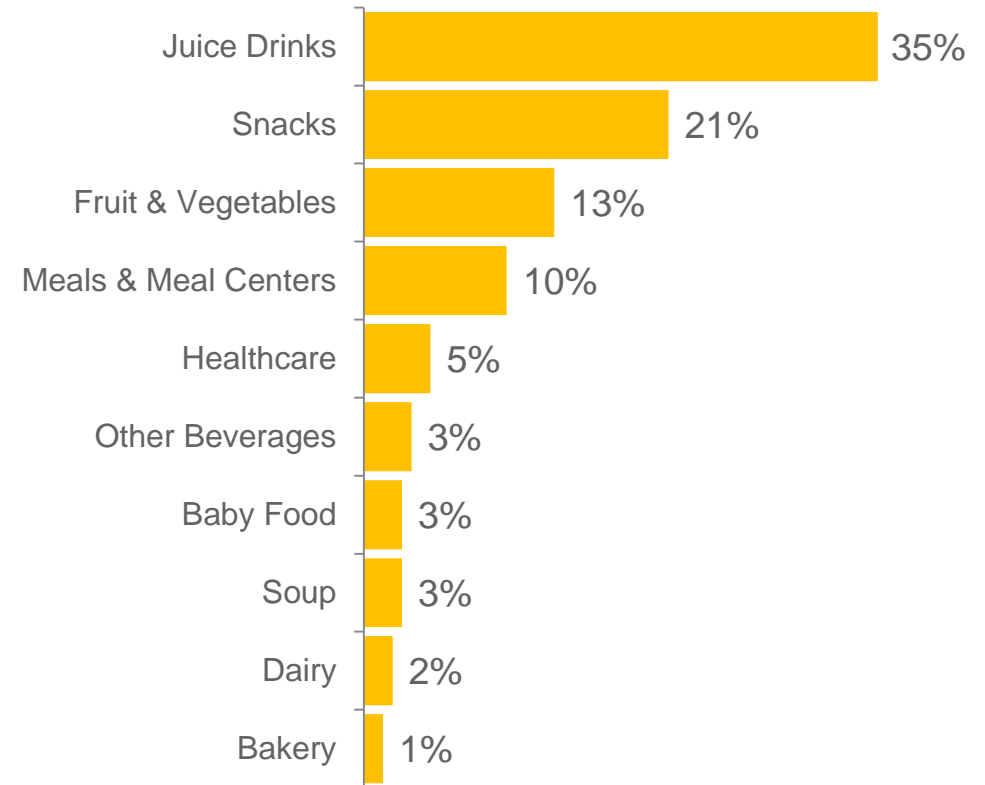
The majority of kale launches occurred in USA and Japan.

The key categories for kale launches are juice drinks, snacks, fruits & vegetables and meals.

Top Launch Countries



Top Launch Categories



154  
Global  
Launches























The main claim globally was no additives & preservatives, gluten free and low/no/reduced allergen.

Bottle and flexible packaging are primarily used for kale products.

### Pack Formats Used

Global		Bottle	23%
		Flexible	23%
		Carton	12%
Asia Pacific		Carton	30%
		Bottle	28%
		Flexible Stand-Up Pouch	11%
North America		Flexible	30%
		Bottle	26%
		Flexible Stand-Up Pouch	13%

### Top Claims Used

Global		No Additives/Preservatives	29%
		Gluten Free	29%
		Low/No/Reduced Allergen	29%
Asia Pacific		Low/No/Reduced Sugar	46%
		No Additives/Preservatives	42%
		Low/No/Reduced Sodium	40%
North America		Gluten Free	37%
		Low/No/Reduced Allergen	37%
		No Additives/Preservatives	35%

Only regions with n >30 are displayed



# Innovative Kale Launches: L3M (June – August 2015)

## Pitango Spinach Kale & Ricotta Soup (New Zealand)

Pitango Spinach Kale & Ricotta Soup comprises spinach, kale and parsley with preserved lemon and ricotta cheese. The manufacturer claims to use only natural ingredients, make meat stocks from scratch, fresh, every day. They also carefully select the finest quality ingredients and use simple techniques to bring out the best flavour. This gluten free, vegetarian soup with no added preservatives is microwaveable and retails in a 600g pack containing two servings.



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

## Livin' Spoonful Sprouted Crackers Kale Sprouted Crackers (USA)

Livin' Spoonful Sprouted Crackers Kale Sprouted Crackers have been relaunched under a new range name, being formerly known as just Livin' Spoonful. The product is raw, vegan and gluten-free. It retails in a newly designed 4.5-oz. pack.



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

## Kroger Braided Crust Kale, Feta & Mushroom Pizza (USA)

Kroger Braided Crust Kale, Feta & Mushroom Pizza is said to have a pizzeria-style taste. It features a white sauce, crust that is crispy on the outside and light and airy on the inside, and flavorful combinations of carefully selected ingredients. The product cooks in 23 to 26 minutes in the oven, and retails in a 23.25-oz. recyclable pack that provides five servings.



**Claims:**  
Ethical - Environmentally Friendly Package

## Inspirai Crispy Purple Corn Kale Chips (Norway)

Inspirai Crispy Purple Corn Kale Chips are air-dried green kale leaves coated with a cheesy-tasty crunchy cashew sauce with purple corn. This vegetable snack is said to be an incredibly delicious and healthy alternative to deep fried potato chips. Combining only natural and 88% organic ingredients, it is gently dehydrated using low heat and features purple corn, a vibrant, revered maize from Peru, mixed with cheesy-tasting nutritional yeast flakes.



**Claims:**  
All Natural Product, Low/No/Reduced Allergen, Gluten-Free, Vegan, Ethical - Environmentally Friendly Package, Ethical - Environmentally Friendly Product, Organic, No Animal Ingredients



# Innovative Kale Launches: L3M (June – August 2015)

## Natural Lawson Green Smoothie (Japan)

Natural Lawson Green Smoothie is made with 118g vegetables and three types of fruits to give a refreshing flavour. The product retails in a 200g pack. Launched in June 2015. RRP not available.



**Claims:**  
NA

## DasEis. Green Smoothie Sorbet (Germany)

DasEis. Green Smoothie Sorbet contains 84% fruit and vegetables from organic farming and is only sweetened with agave syrup. The gluten- and lactose-free, climate neutral product is hand made, is suitable for vegans and retails in a 125ml FSC certified tub which is 100% biodegradable and compostable. The pack bears the EU Green Leaf and Facebook logos.



**Claims:**  
Low/No/Reduced Lactose, Low/No/Reduced Allergen, Gluten-Free, Vegan, Ethical - Environmentally Friendly Package, Social Media, Organic, No Animal Ingredients, Carbon Neutral

## Avoca To Go Butternut Squash & Kale Cannelloni (Ireland)

Avoca To Go Butternut Squash & Kale Cannelloni have been repackaged in a smaller 390g pack. The product is suitable for home freezing.



**Claims:**  
On-the-Go

## Eat Real White Cheddar Flavour Quinoa & Kale Puffs (UK)

Eat Real White Cheddar Flavour Quinoa & Kale Puffs are described as a super grain snack, and are suitable for vegetarians and vegans. The snack retails in an 80g pack. It was on display at the Natural & Organic Products Europe 2015, London.



**Claims:**  
Vegan, Vegetarian, No Animal Ingredients



# Innovative Kale Launches: L3M (June – August 2015)

## Raw Health Organic Green Supreme Kale Balls (UK)

Raw Health Organic Green Supreme Kale Balls are organic raw fruit balls bursting with kale, spinach and dates. They are made at low temperatures to retain the nutritional properties of the ingredients. This vegan product is free from gluten as well as beet or cane sugar, and retails as a 60g pack with three balls. This product was on display at the Natural & Organic Products Europe 2015, London.



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

## Marks & Spencer Pasterizovaná Jablečná a Ananasová Stáva s Kapustovým Protlakem (Pressed & Crushed Tropical Juice with Kale) (Czech Republic)

Marks & Spencer Pasterizovaná Jablečná a Ananasová Stáva s Kapustovým Protlakem (Pressed & Crushed Tropical Juice with Kale) is made with apple and pineapple juices not from concentrate as well as apple, mango, passionfruit and kale purees. The vegetarian product provides two of the five-a-day portions of fruits and vegetables and retails in a 250ml pack, featuring the Eat Well logo.



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

## Lotus Scoop The Puddle Jumper Kale, Pear & Banana Artisan Flavors Ice Cream Collection (USA)

Lotus Scoop The Puddle Jumper Kale, Pear & Banana Artisan Flavors Ice Cream Collection has been repackaged with an updated design. The pasteurized product comprises local dairy from the Hudson Valley in New York. The product retails in a 1-pt. tub.



**Claims:**  
All Natural Product

## Beech-Nut Organic Pear, Kale & Cucumber Baby Food (USA)

Beech-Nut Organic Pear, Kale & Cucumber Baby Food is now available. This stage 2 meal is suitable for babies from about six months of age and is certified as organic by USDA. The product can be heated in the microwave and retails in a 4.25-oz. jar.



**Claims:**  
Organic, Babies & Toddlers (0-4), GMO-Free, Microwaveable



# Australian Kale Launches: L3M (June – August 2015)

## Celebrate Health Potato & Kale Soup

Celebrate Health Potato & Kale Soup is a 100% natural soup that contains no gluten, GMO, MSG or nuts. This 100% natural is suitable for vegans, ready in two minutes in the microwave, and retails in a 500g pack, featuring the Instagram and Facebook logos.



### Claims:

No Additives/Preservatives, All Natural Product, Low/No/Reduced Allergen, GMO-Free, Vegan, Social Media, Time/Speed, Microwaveable, Gluten-Free, No Animal Ingredients

## Alive & Radiant Foods Kale Krunch The Original Quite Cheezy Green Supersnack

Alive & Radiant Foods Kale Krunch The Original Quite Cheezy Green Supersnack comprises raw kale chips with a rich cheddar flavor, which are made without cheese. According to the manufacturer, kale is known to ease congestion and helps protect the stomach. It is a source of chlorophyll, calcium, iron and vitamins and is free from gluten, soy and dairy. It is made with nutrient-rich vegetables, superfoods and organic spices for perfect supersnack. This product retails in a 63g pack.



### Claims:

No Additives/Preservatives, Low/No/Reduced Allergen, GMO-Free, Gluten-Free

## Michael Brothers Living Green Juice

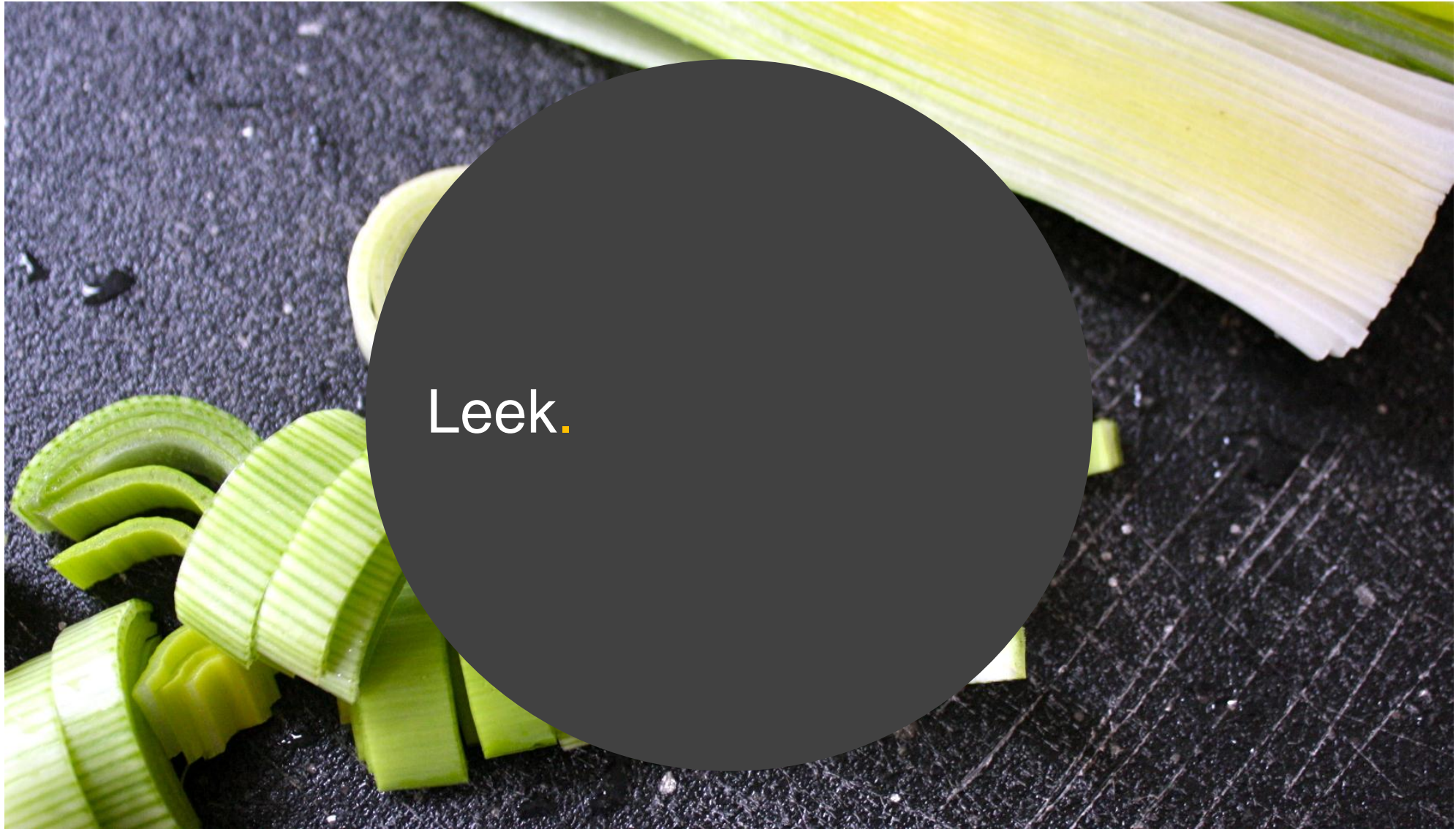
Michael Brothers Living Green Juice is made with 100% West Australian fruit. The traditionally cold pressed juice product is said to offer 10% more raw juice for the same price. The all natural product is raw and free from preservatives, concentrates, artificial colours and flavours. It retails in a recyclable 1100ml pack featuring the manufacturer's Facebook information. The manufacturer is said to use only local fruit to support Western Australian farmers.



### Claims:

No Additives/Preservatives, All Natural Product, Ethical - Environmentally Friendly Package, Social Media





Leek.





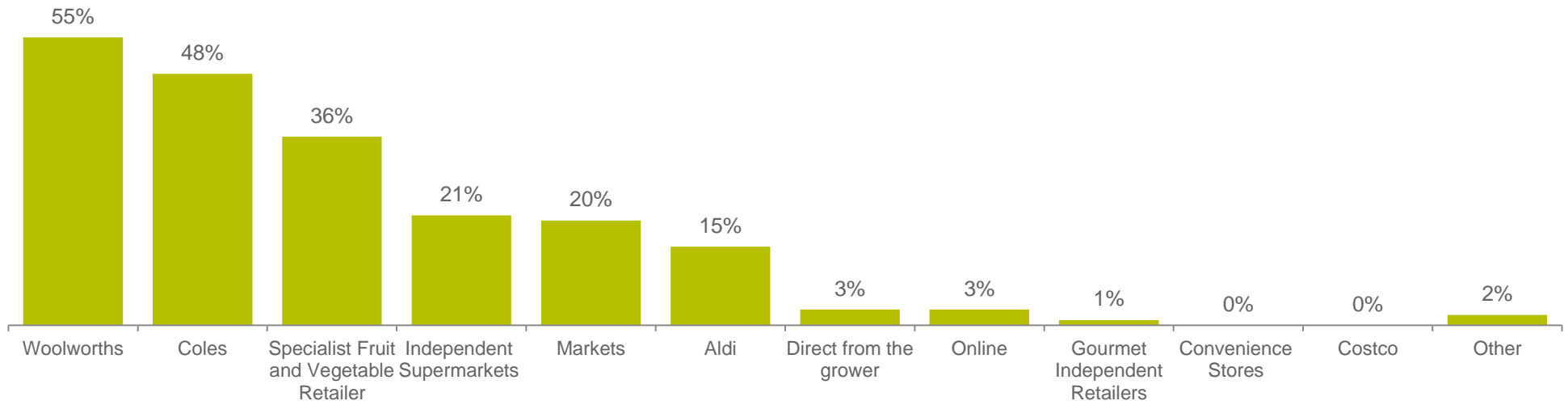
On average, leeks are purchased twice per month, and are consumed around once per week.

Leeks are generally purchased from mainstream retailers such as Woolworths and Coles.

Average Purchase 2.2 times per month

Average Consumption 3.9 times per month

### Purchase Channels



■ Wave 26: Jun-15

Q1. On average, how often do you purchase leeks?  
Q2. On average, how often do you consume leeks?  
Q5. From which of the following channels do you typically purchase leeks?  
Sample Wave 26 N=206



Leeks are perceived as fair value for money, with consumers purchasing 800g on average.



Average weight of purchase

The average consumer typically purchases **800g** of leeks.



Recalled last spend

Recalled last spend on leeks was **\$3.30**.



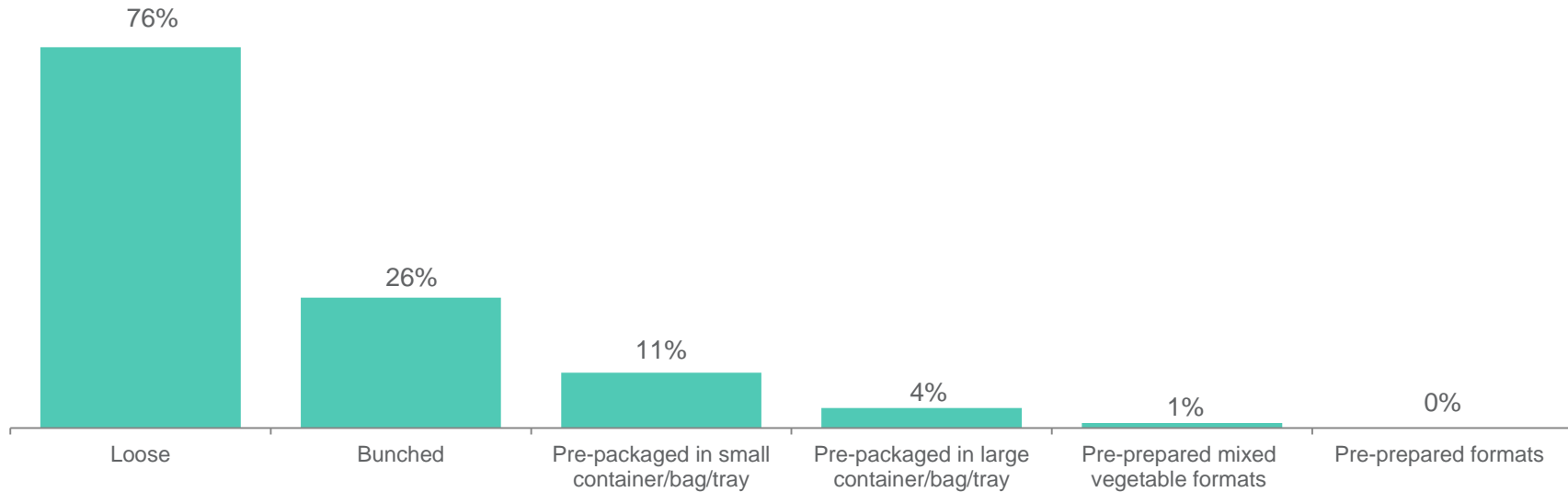
Value for money

Consumers' perceived value for money is fair for leeks (**6.2/10**).

Q3. How much leek 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 26 N=206



Individual leeks are the most common purchase format. Bunched formats are another relatively popular option typically purchased by consumers.



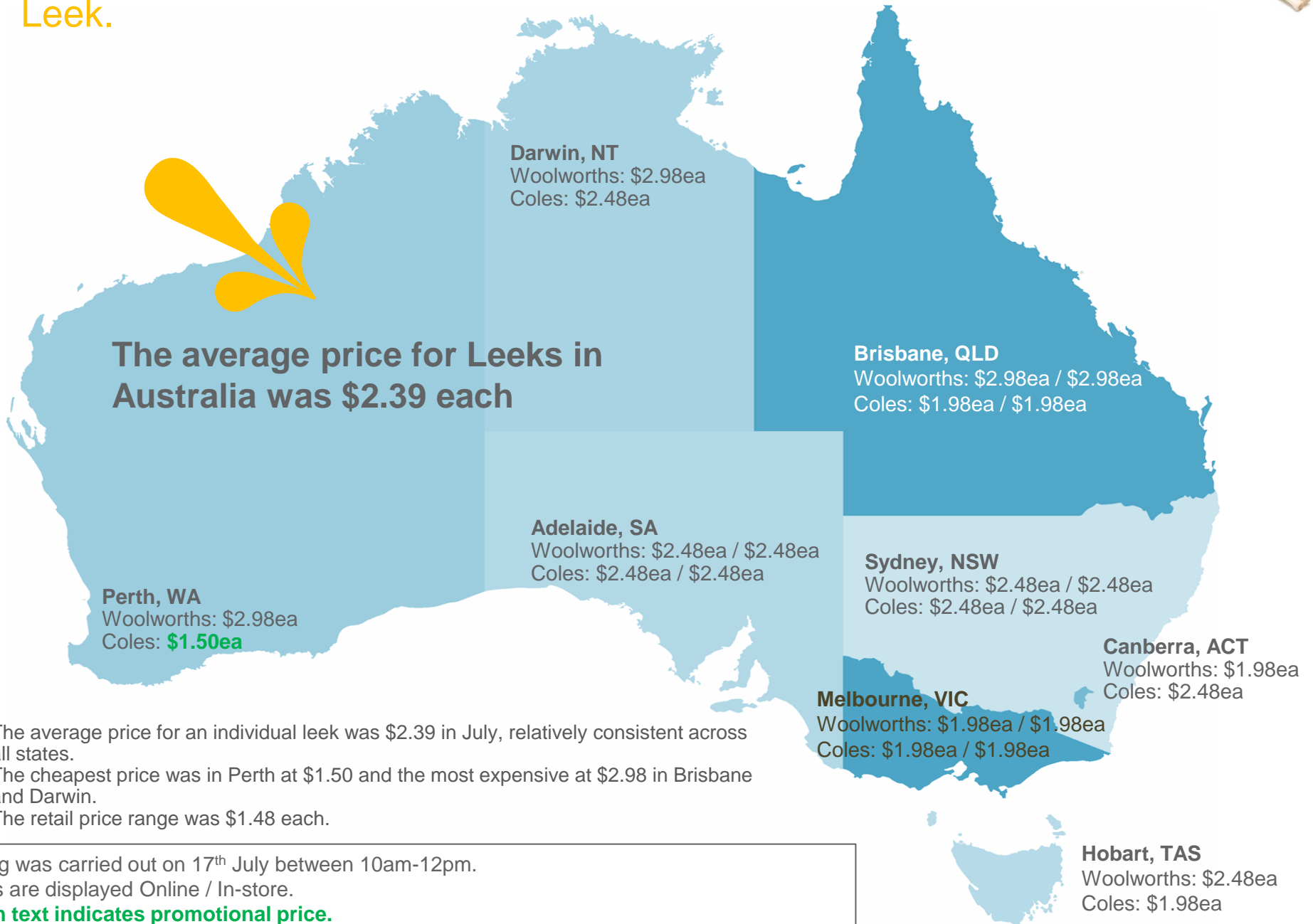
Q4b. In what fresh formats do you typically purchase leeks?  
Sample Wave 26 N=206



# Online and In-store Commodity Prices.



## Leek.



- The average price for an individual leek was \$2.39 in July, relatively consistent across all states.
- The cheapest price was in Perth at \$1.50 and the most expensive at \$2.98 in Brisbane and Darwin.
- The retail price range was \$1.48 each.

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



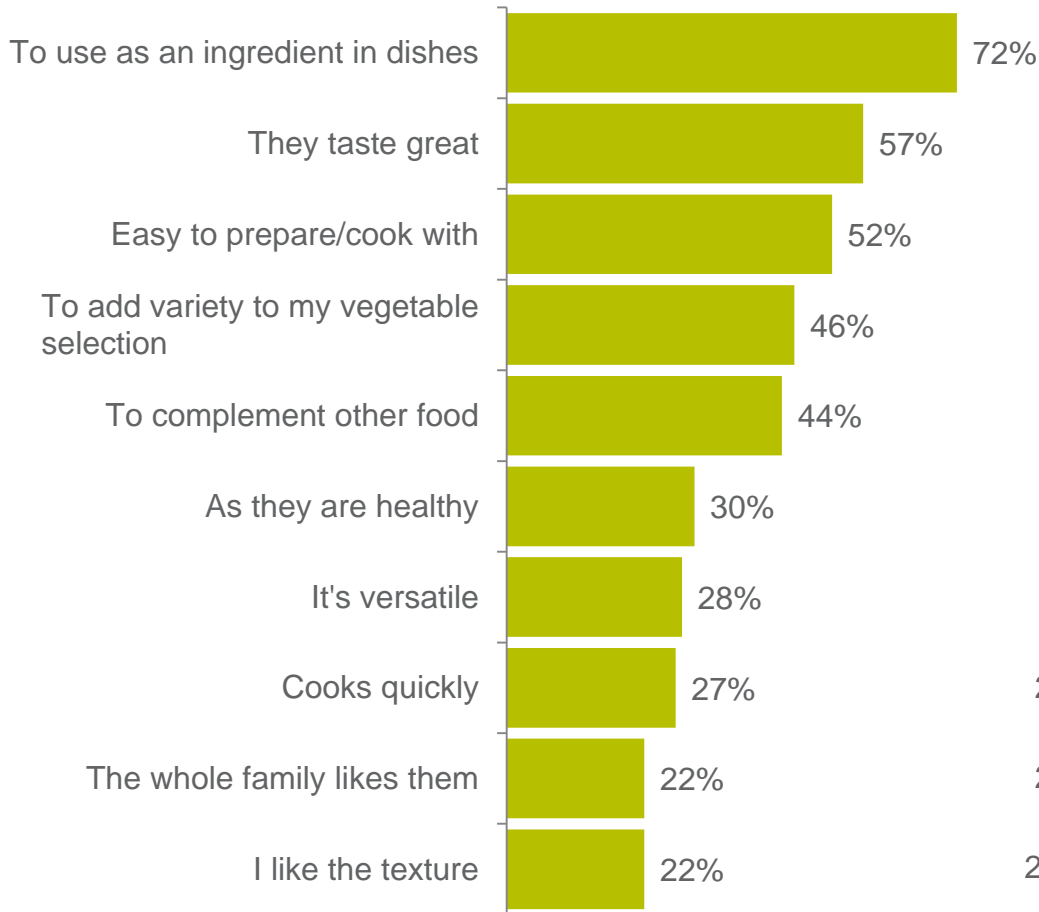
Awareness of leek varieties is low, with 85% of consumers unable to recall a type.



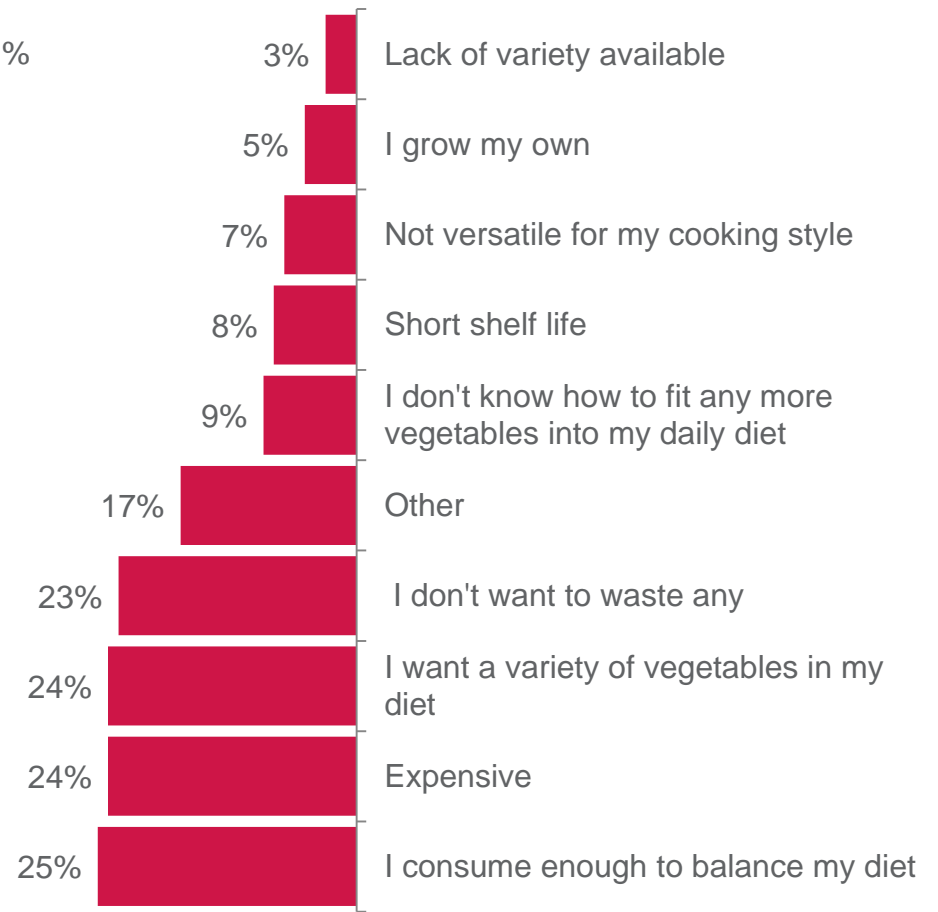


Using leeks as an ingredient in dishes, tasting great and its ease of preparation are the key drivers of purchase. In contrast, the key barriers to purchase are already consuming enough to balance their diet, that they are expensive and also wanting a variety of vegetables.

### Triggers



### Barriers



Q7. Which of the following reasons best describes why you purchase leeks?  
 Q8. Which reason best describes why you don't buy leeks more often?  
 Sample Wave 26 N=206





Traditional and Modern Australian cuisine are most popular for leek dishes.

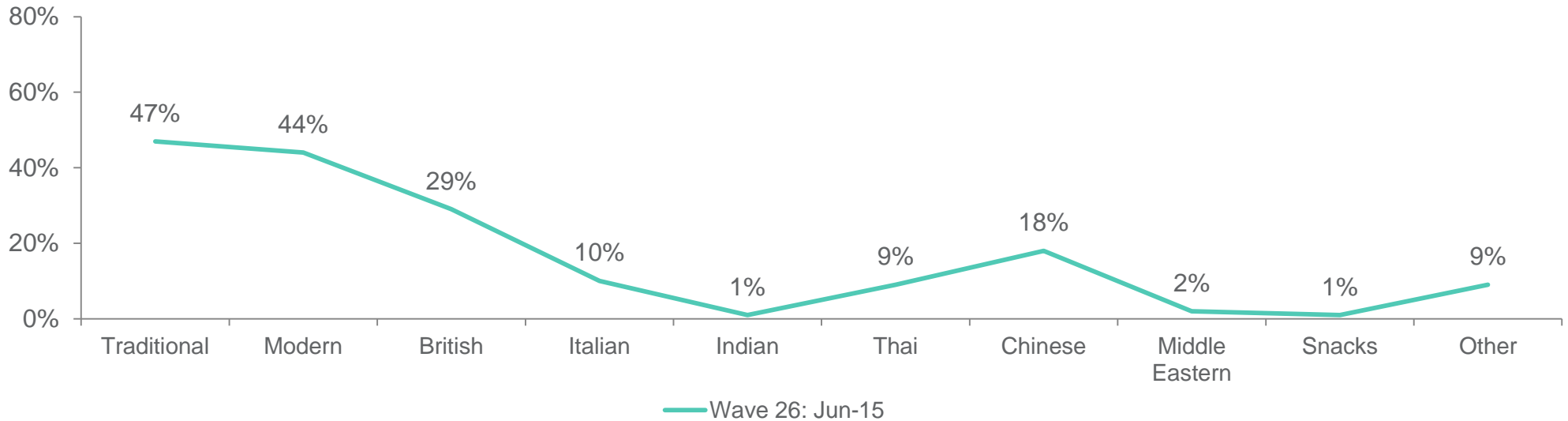
Meal occasions tend to occur during dinner and family meals.

### Top 5 Consumption Occasions



Dinner	66%
Family meals	58%
Weekday meals	39%
Weekend meals	29%
Quick meals	21%

### Typical Cuisine Cooked

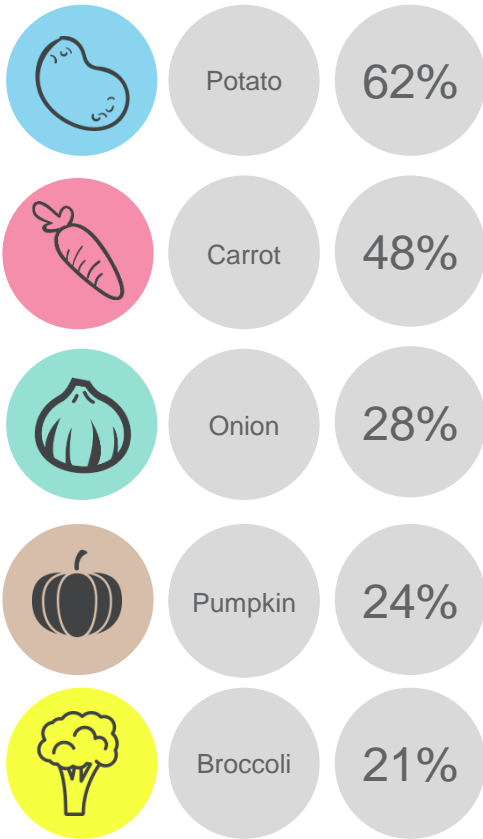


Q10. What cuisines do you cook/consume that use leeks?  
 Q11. Which of the following occasions do you typically consume/use leeks?  
 Sample Wave 26 N=206



Consumers prefer to serve leeks with potatoes and carrots. Leeks are generally cooked in soups and stir fries.

Accompanying Vegetables

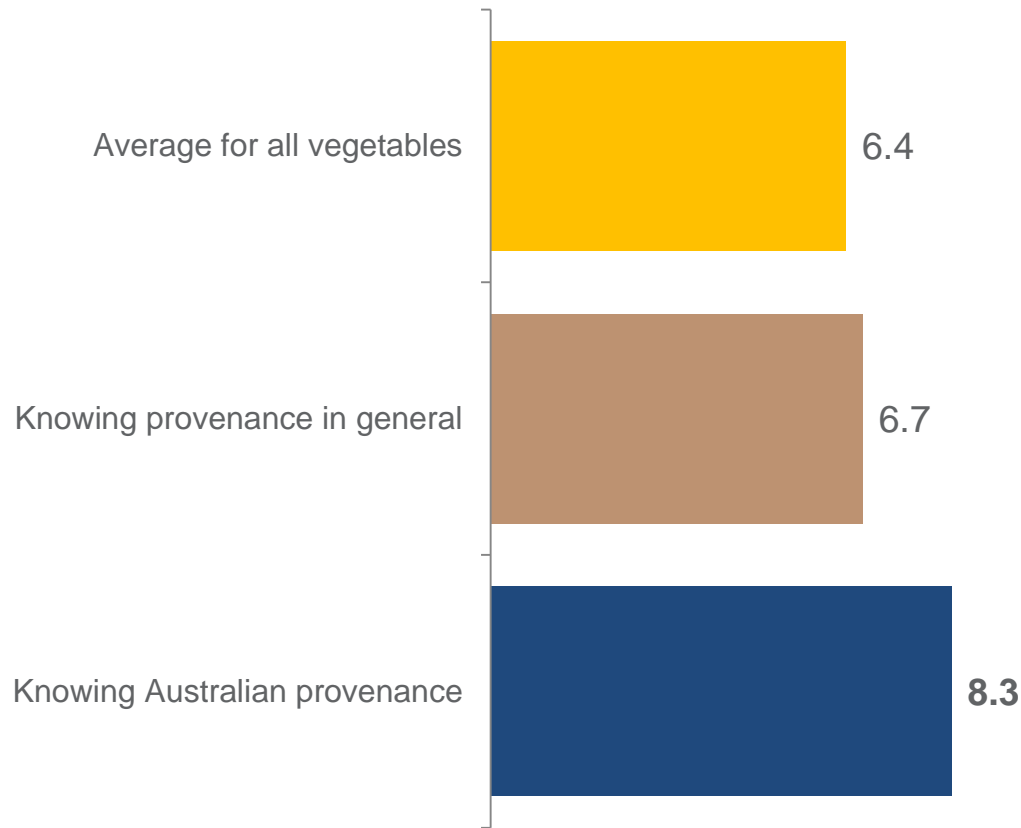


Top 10 Cooking Styles	
	Wave 26
Soup	68%
Stir frying	37%
Sautéing	33%
Slow cooking	30%
Frying	22%
Steaming	17%
Boiling	12%
Baking	11%
Roasting	8%
Microwave	6%

Q9. How do you typically cook leeks?  
Q10a. And when are you serving leeks which of the following do you also serve together with this?  
Sample Wave 26 N=206



# Knowing that leeks are grown in Australia is the most important provenance information for consumers.



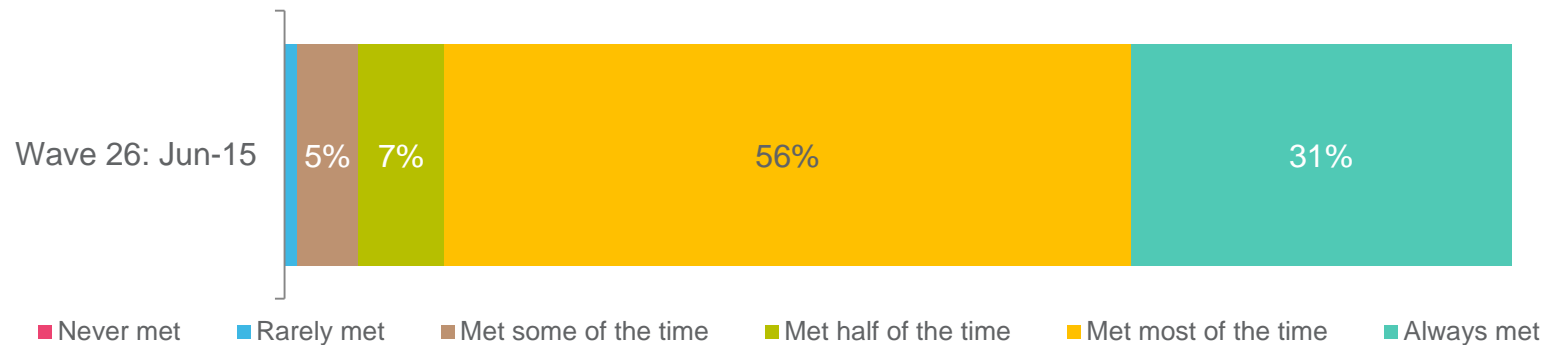
Q14. When purchasing leeks, how important is Provenance to you?  
Q15. And when purchasing Leeks, how important is that it is grown in Australia?  
Sample Wave 26 N=206



Consumers expect leeks to remain fresh for just over a week once purchased, which is being met most of the time.

Expected to stay fresh for 8.9 days

### Expectations Met



Q12. How long do you expect leeks to stay fresh for, once you have purchased it?  
Q13. How often is this length of freshness met when you buy leeks?  
Sample Wave 26 N=206

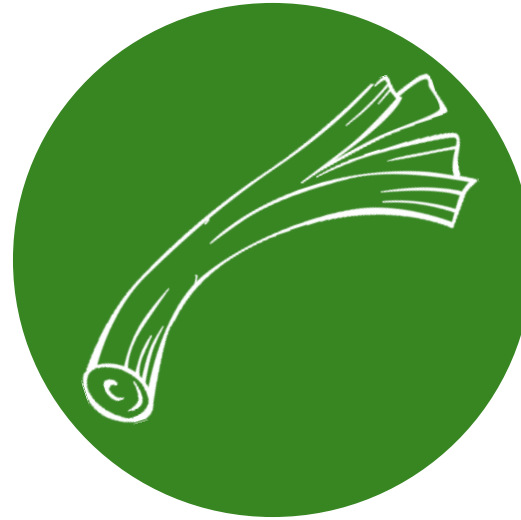
A photograph of leeks on a dark surface. One leek is sliced into rings, and another is cut lengthwise. A large, dark grey circle is overlaid on the center of the image, containing the text 'Leek Product Launch Trends.' in white.

# Leek Product Launch Trends.

# Leek Global Launches

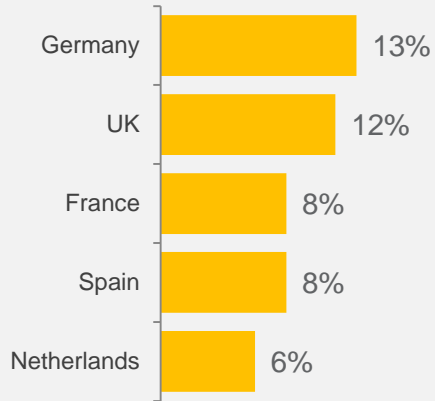
## June – August 2015

There were 424 leek products launched globally over the last three months. The majority of launches were in Germany and the UK. Categories for launches were meals and soups. Key packaging for leek products was flexible formats.

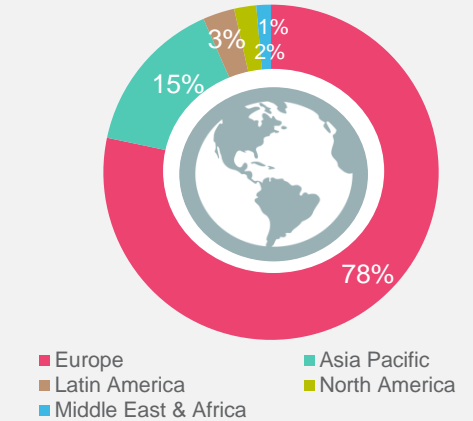


424 Global NPDs

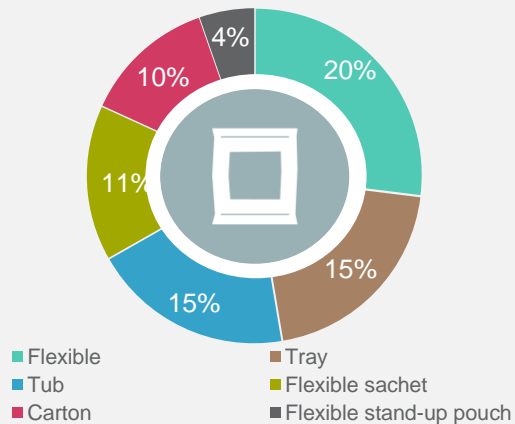
### Country



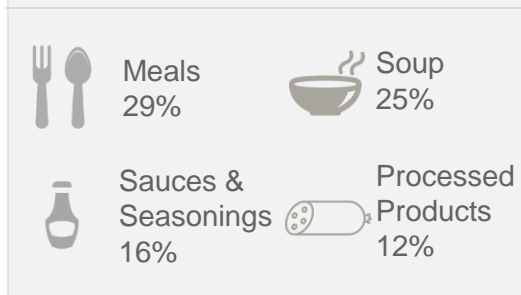
### Region



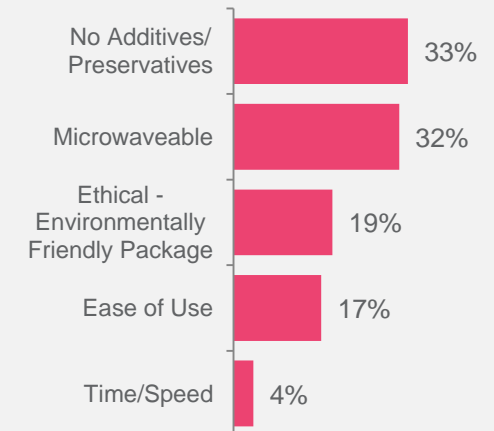
### Top Pack Formats



### Categories



### Top Claims

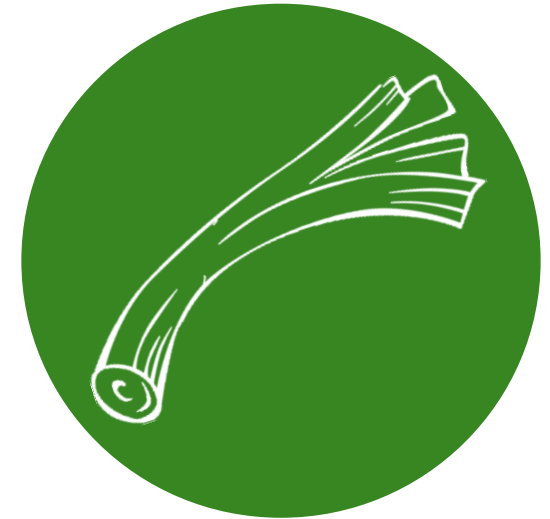






## Leek Product Launches: Last 3 Months (June – August 2015) Summary

- There were 424 launches in the past 3 months globally that contained leeks as an ingredient.
- There were 13 products launched in Australia over the past three months.
- Europe (78%) was the key region for launches.
- Flexible packaging (20%), trays (15%) and tubs (15%) were the most common format used for products.
- The main categories for launches were meals (29%), soup (25%) and sauces & seasonings (16%).
- Claims used on products highlighted health; no additives/preservatives (33%), and convenience; microwaveable (32%) and ease of use (17%).
- The most innovative product launched was the Gourmet Olive Pâté from Brazil. Examples of these can be found in the following pages.



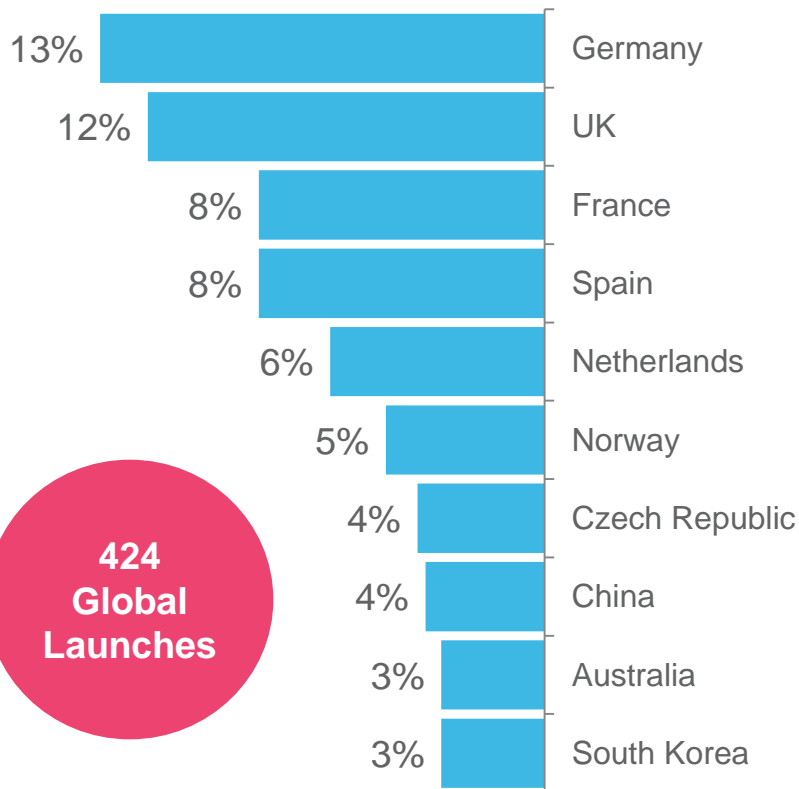
Source: Mintel (2015)



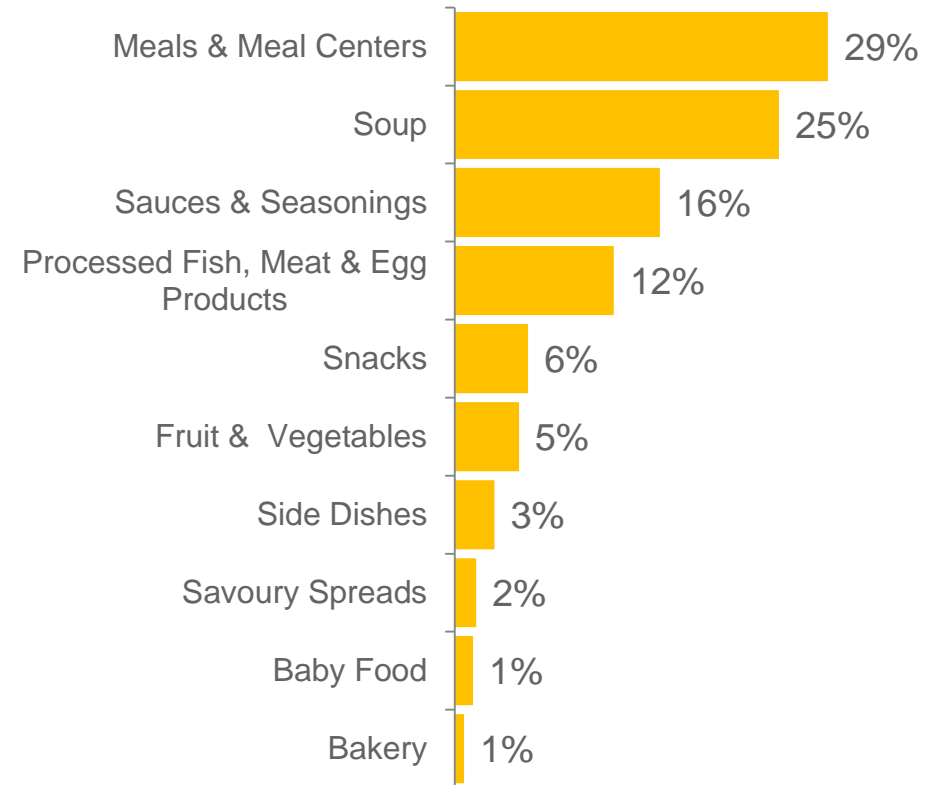
The majority of launches occurred in Germany and the UK.

The key categories for leek launches are meals, soups, sauces & seasonings and processed products.

Top Launch Countries



Top Launch Categories












424  
Global  
Launches










➤➤➤➤➤ The main claim globally was no additives & preservatives, gluten free and low/no/reduced allergen.

Pack formats are generally consistent across regions with flexible, tray and tubs being the main packaging format for leek products.

### Pack Formats Used

Global		Flexible	20%
		Tray	15%
		Tub	15%
Europe		Tray	20%
		Flexible	19%
		Tub	16%
Asia Pacific		Flexible	27%
		Flexible Stand-Up Pouch	20%
		Tub	16%

### Top Claims Used

Global		No Additives/Preservatives	33%
		Microwaveable	32%
		Ethical - Environmentally Friendly Package	19%
Europe		No Additives/Preservatives	33%
		Microwaveable	32%
		Ethical - Environmentally Friendly Package	23%
Asia Pacific		Microwaveable	33%
		No Additives/Preservatives	28%
		Time/Speed	25%

Only regions with n >30 are displayed



# Innovative Leek Launches: L3M (June – August 2015)

## Naked Locals Franklin Hearty Vegetable Soup with Barley & Kale (New Zealand)

The microwavable product is made using the freshest premium ingredients. According to the manufacturer, they source the key ingredients from the local region in New Zealand all year round, means purchasing this product is good for local NZ farmers. The company is claimed to support Oxfam and the contribution goes towards supporting sustainable farming. The vegetarian soup is free from gluten, preservatives, artificial colours or flavours, and retails in a 500g pack.



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

## Küchen Brüder Vegan Organic Thai Curry (Germany)

Küchen Brüder Veganes Bio Thai-Curry (Vegan Organic Thai Curry) features rice and crunchy vegetables with an aromatic seasoning and does not contain flavour enhancers, additives or preservatives. This ready-to-serve product is also suitable for vegetarians, can be heated in the microwave and retails in a 380g tub featuring Facebook, EU Green Leaf and BIO logos.



**Claims:**  
No Additives/Preservatives, Vegan, Social Media, Microwaveable, Ease of Use, Organic, No Animal Ingredients, Vegetarian

## Galeria Gourmet Spring Salad (Germany)

Galeria Gourmet Frühlingssalat (Spring Salad) comprises fruit and vegetables in a cream sauce. The product retails in a 220g tub.



**Claims:**  
NA

## Flete Four Cheese Stone Baked Pizza (Spain)

Flete Pizza al Horno de Piedra 4 Quesos (Four Cheese Stone Baked Pizza) is a frozen pizza containing edam, mozzarella, emmental and gorgonzola cheeses. The product retails in a 350g pack and is to be prepared in the oven.



**Claims:**  
NA



# Innovative Leek Launches: L3M (June – August 2015)

## Iceland Indian Rice (UK)

Iceland Indian Rice is a ready cooked white rice with vegetables in an Indian style seasoning. The microwaveable product is suitable for vegetarians and retails in an 800g bag.



**Claims:**  
Vegetarian, Microwaveable

## Alipende Vegetable Broth (Spain)

Alipende Caldo de Verduras (Vegetable Broth) is now available. The gluten-free product contains 0.3% extra virgin olive oil, can be heated in the microwave and retails in a 1L FSC certified, recyclable pack.



**Claims:**  
Gluten-Free, Low/No/Reduced Allergen, Ethical - Environmentally Friendly Package, Microwaveable

## Maheso Seafood Paella (Mexico)

Maheso Paella de Marisco (Seafood Paella) has been repackaged in a newly designed 1kg pack featuring the manufacturer's Facebook and Twitter links. This Spanish product is said to be easy, quick and practical, and can be microwave heated.



**Claims:**  
Ease of Use, Social Media, Time/Speed, Microwaveable

## Casa Mas Vichyssoise Soup (Spain)

Casa Mas Vichyssoise (Vichyssoise Soup) has been repackaged. The product is recommended cold with parmesan shavings, or hot with Jabugo ham croutons. It retails in a 0.5L bottle that features the Facebook, Google Plus, Youtube, Twitter, Instagram, and LinkedIn logos, and a QR code.



**Claims:**  
Social Media



# Innovative Leek Launches: L3M (June – August 2015)

## La Pianezza Gourmet Olive Pâté (Brazil)

La Pianezza Gourmet Patê de Azeitonas (Olives Pâté) has been repackaged in a newly designed 145g jar. This spread is a source of fiber, contains green banana biomass, and is free from gluten, lactose, artificial colors, flavors and preservatives.



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

## Pitango Pumpkin, Leek & Spinach Risotto (New Zealand)

Pitango Pumpkin, Leek & Spinach Risotto has been repackaged with an updated look. It is described by the manufacturer as Arborio rice in a creamy white wine sauce with sweet golden pumpkin, leek, spinach and parmesan cheese. The vegetarian risotto is free from gluten and added preservatives. The microwaveable product retails in a 500g pack.



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

## Nikas Fuego Fumé Country Sausages with Leek (Greece)

Nikas Fuego Fumé Choriatika Loukanika me Praso (Country Sausages with Leek) are now available. The smoked product retails in a 400g pack.



**Claims:**  
NA

## Go-Tan Nasi Goreng Sauce (Netherlands)

Go-Tan Nasi Goreng Sauce (Nasi Goreng Sauce) is now available. The product can be used to prepare a seasoned friend rice and retails in a 120g pack.



**Claims:**  
NA





# Australian Leek Launches: L3M (June – August 2015)

## Maggie Beer Vegetable Stock

Maggie Beer Vegetable Stock has been repackaged and is now available in a newly designed pack. The product is said to have a wonderful freshness of flavour as it is made with slowly roasted onions, garden vegetables, fresh herbs and the added lift of verjuice. It is said to be the perfect starting point for a hearty winter soup, when braising vegetables, cooking whole grains and beans and retails in a 500ml pack.



Claims:  
NA

## Annabel Karmel Perfect Chicken & Potato Pie

Annabel Karmel Perfect Chicken & Potato Pie is described as tasty chicken with vegetables in a creamy sauce topped with cheesy potato and carrot mash. The microwaveable product is designed for children from one to four years old; is low in sodium and sugar; and is free from preservatives and artificial colours and flavours. It is said to be one serve of veggies, and retails in a 200g recyclable pack.



Claims:  
No Additives/Preservatives, Ethical - Environmentally Friendly Package, Low/No/Reduced Sugar, Microwaveable, Low/No/Reduced Sodium, Babies & Toddlers (0-4)

## Hedy's Leek & Bacon Quiche

Hedy's Leek & Bacon Quiche has been repackaged in a newly designed 1.1kg pack containing six to eight servings. The quiche is made using fresh eggs, milk, cream and cheese encased in golden crisp pastry base and finished with chunks of real bacon, sliced fresh leek and a unique spice blend.



Claims:  
NA

## Simmons Logue Fine Food Chicken & Leek Cocktail Pies

Simmons Logue Fine Food Chicken & Leek Cocktail Pies have been relaunched under a new brand name, being formerly under the Simmons Logue Fine Food Company brand. This handmade product retails in a 660g pack containing 12 units.



Claims:  
NA



In the Media.



# General Vegetable News

## (June – August 2015)

- Australia's new Country of Origin labelling laws will begin appearing on supermarket shelves later this year. The new system is expected to be in place by mid-2016, following a transition period.
- The new system will also see clearer rules around when food labels can carry 'made in' or 'packed in' statements.
- These symbols will cost the government A\$37 million a year, and consumers could expect to fork out 1c more for every \$5 they spend. Results from a government survey revealed that consumers were prepared to pay significantly more than that.



# Commodity News

## (June – August 2015)



- Fitness coach and founder of My Body Tutor, Adam Gilbert, has suggested the 'Broccoli Test' to help people differentiate between physical and emotional hunger.
- Ask yourself "would I eat broccoli right now?" If you answer "yes" then you are physically hungry. If you answer "no" then you're emotionally hungry. You are hungry for something else (stress relief, a distraction, a quick escape etc).

<http://www.lifehacker.com.au>



- Managing director from Australia's largest chilli company (Austchilli), David de Paoli, believes that the new free trade agreement with China does not present many opportunities for the horticulture industry.
- Mr. de Paoli says that success in China will always come down to price, marketing and relationships.

[www.abc.net.au](http://www.abc.net.au)



- The rising input costs and a changing market has resulted in pressure on profit margins for hydroponic lettuce growers. The owner of a hydroponic farm in Alice Springs has stated that the rising demand for packaged lettuce is due to consumers becoming lazier.
- The packaged lettuce market has been pretty much monopolised by southern growers due to their benefits from economies of scale, according to Mr. McCosker.

[www.abc.net.au](http://www.abc.net.au)



- A new robot that can pick and place 180 sweetcorn cobs a minute is being trialled to help slash labour costs in sweetcorn factories. This task has been traditionally labour intensive, slow and expensive.
- It is estimated that, on a line manned by two operators per shift, the robot could pay for itself within a year.

[www.fruitnet.com](http://www.fruitnet.com)



# Commodity News

## (June – August 2015)



- Green peas are packed with health benefits as they are packed with fibre and protein, but low in fat content.
- Other benefits of eating green peas regularly include a healthy heart, strong bones and low cholesterol.
- It is recommended that people should include this vegetable in their daily diet.

[www.timesofindia.com](http://www.timesofindia.com)



- An article has claimed that excessive consumption of kale has been making people ill due to its high concentration of heavy metals.
- However, many have raised concerns over the lack of evidence backing these claims.
- In conclusion, the risk associated with kale is the same as eating too much of any other vegetable.

[www.rawstory.com](http://www.rawstory.com)



- The best way to get a healthy gut is to look after your 'good' bacteria. This bacteria will make sure that you are digesting your food, absorbing nutrients, fighting harmful bacteria. The most effective way of looking after the gut is by feeding the 'good' gut bacteria with a special kind of food called prebiotics.
- Prebiotics can be found in leeks. As prebiotics cannot be digested, they can make it all the way to the lower intestine.

[www.dailymail.co.uk/health](http://www.dailymail.co.uk/health)



# Project Harvest Background & Methodology





# Background & Setting the Scene.

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

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

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

This wave's report (Wave 26, July 2015) focuses on:

- ⇒ Broccoli
- ⇒ Chillies
- ⇒ Lettuce
- ⇒ Sweet Corn
- ⇒ Green Peas
- ⇒ Kale
- ⇒ Leek

**This is the first wave of tracking for kale and leek. This current report will highlight any observations in regards to these specific commodities.**

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





# Online Methodology.

- Consumers were recruited via an Online Panel. If the consumers met the recruitment requirements of sufficient vegetable consumption (monthly) they were asked to complete the online questionnaire.
- All respondents completed general demographic and consumption questions. If respondents purchased any of the specific commodities within the last month they would complete those questions. A minimum of N=500 respondents completed the questionnaire.
- Topics covered in the questionnaire were vegetable purchase and consumption, category health, price and value perceptions, triggers and barriers to purchase and preparation and cooking preferences.
- An additional two ad-hoc questions were asked at the end of the questionnaire. The subjects of these questions are supplied by Horticulture 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 (broccoli, chilli, lettuce, sweet corn, green peas, kale, leek) within the last month
- ⇒ Were the main or joint grocery buyer.

	Broccoli n=309	Chilli n=201	Lettuce n=312	Sweet Corn n=304	Green Peas n=309	Kale n=200	Leek n=206
<b>Gender</b>							
Male	37%	49%	36%	40%	39%	36%	32%
Female	63%	51%	64%	60%	61%	65%	68%
<b>Age</b>							
18-24 y.o.	9%	2%	9%	5%	6%	4%	2%
25-34 y.o.	17%	12%	18%	21%	21%	17%	9%
35-44 y.o.	17%	12%	18%	26%	23%	19%	16%
45-54 y.o.	21%	27%	18%	19%	18%	19%	14%
55-64 y.o.	18%	27%	19%	14%	17%	24%	28%
65+ y.o.	18%	19%	18%	15%	16%	19%	31%
<b>Household</b>							
Single Income no Kids	21%	16%	22%	16%	19%	18%	23%
Double Income no Kids	16%	20%	16%	13%	15%	22%	13%
Young Families	17%	13%	18%	25%	22%	13%	10%
Established Families	24%	19%	22%	30%	26%	22%	18%
Empty Nesters	22%	30%	22%	17%	18%	27%	35%
<b>Location</b>							
New South Wales	22%	17%	22%	25%	27%	18%	13%
Victoria	20%	14%	22%	22%	23%	17%	19%
South Australia	14%	15%	14%	14%	13%	16%	15%
Queensland	19%	15%	20%	19%	17%	15%	15%
Western Australia	18%	18%	16%	14%	16%	14%	15%
Tasmania	3%	14%	4%	3%	2%	14%	18%
Australian Capital Territory	3%	4%	3%	2%	3%	6%	4%
Northern Territory	0%	2%	0%	0%	0%	1%	1%



# Trends Research: Our Approach

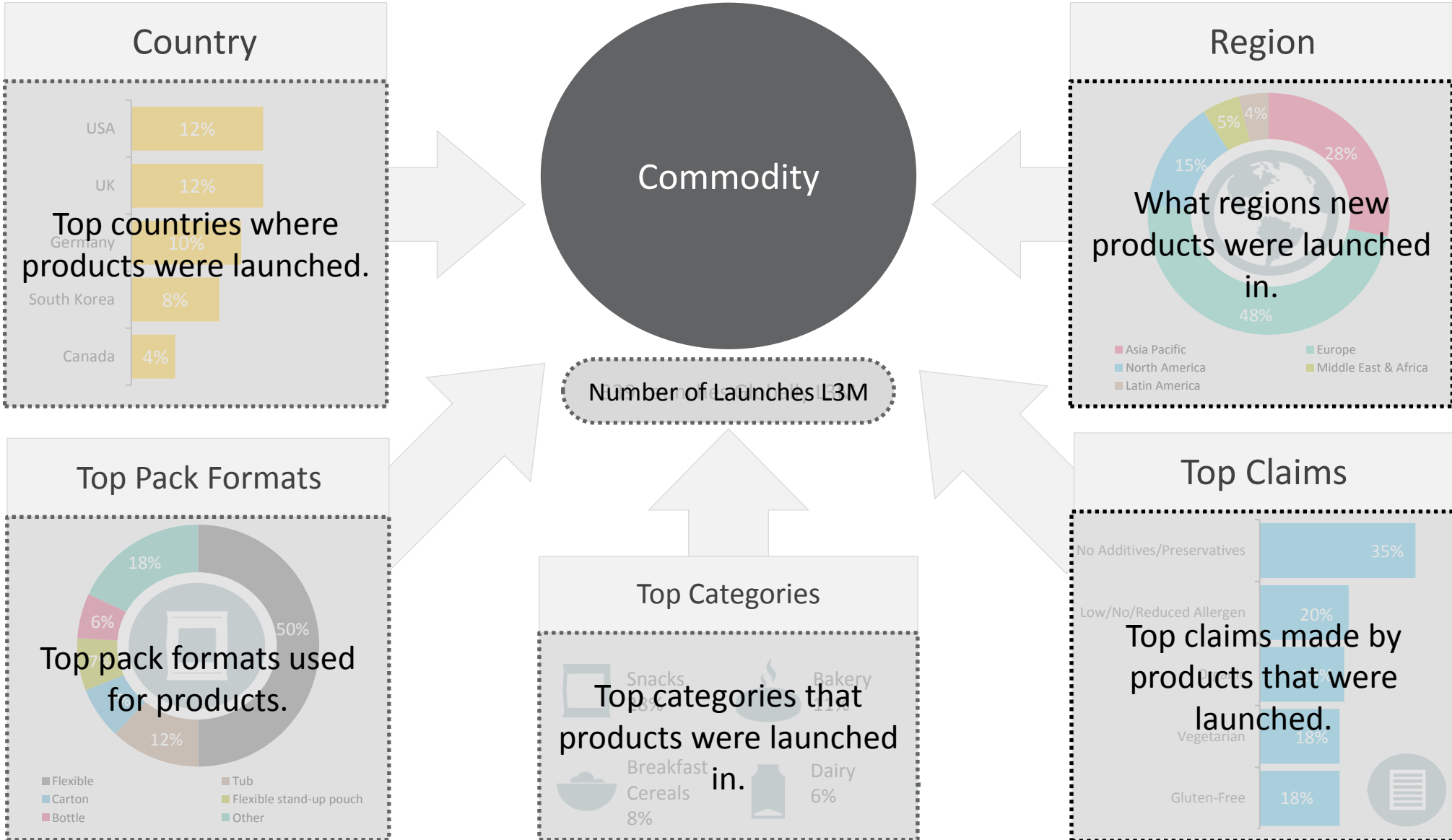


- ▶ Colmar Brunton has used a combination of both desk research and in the field market research to explore the trends for each vegetable commodity being tracked this month.
- ▶ Our main source of secondary data for this report was collected from Mintel Global New Products Database (GNPD).
- ▶ This data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





# Thanks.

