

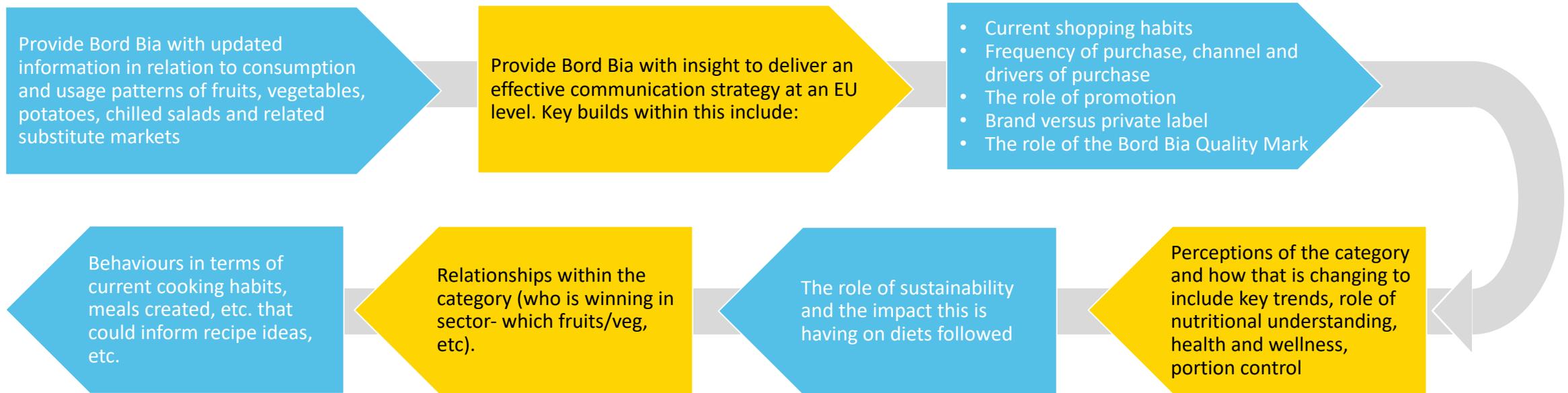
Fresh Produce Study

July 2020



Research Background & Objectives

- A need was identified by Bord Bia to update a 2017 fresh produce study (conducted by B&A), with a view to informing an EU “International Year of Fruit and Vegetables 2021” promotional campaign.
- The core campaign communications objective = “Put Fresh Produce at the heart of a healthy diet”.
- The specific research objectives were to:



- A research approach which is both robust enough to provide updated quantitative metrics in comparison to the 2017 and previous studies, and sensitive enough to tease out the underlying fresh produce dynamics, was adopted.



QUANTITATIVE BEHAVIOURAL AND ATTITUDINAL STUDY

A comprehensive online survey, measuring product consumption and purchase behaviour, purchase decision factors and drivers, portion size behaviour and attitudes, consumer products needs profile, and most effective nutrition and healthy eating communications channels

N =1,000



QUALITATIVE CATEGORY DYNAMICS STUDY

16 digital ethnographies covering consumer behaviour (shopping, preparation, consumption, storage, interaction, enjoyment) around the designated categories as well as general reflection on trends, nutrition, sustainability, influencers.

2 follow up consumer workshops to understand food preparation and interaction in a more experimental and dynamic set up.

The big picture

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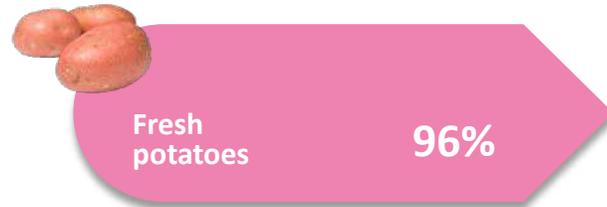
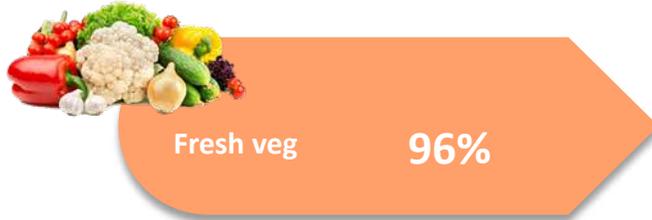
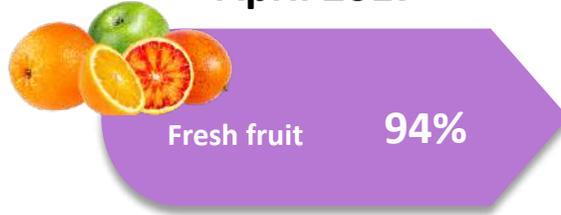


Pretty much everyone eats fresh vegetables, fresh potatoes and/or fresh fruit at least weekly

Base: All Participants - 1029

Eat at least once a week

April 2017



April 2020



*Any salad from scratch - (April '17 69%)

The near-ubiquitous consumption of fresh produce is consistent with the 2017 study.

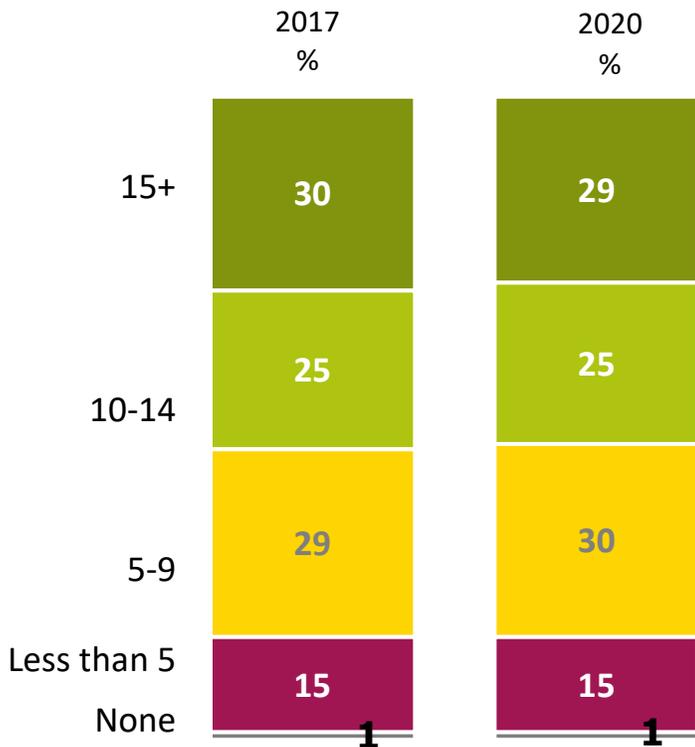


Q.1 Using the following scale, how often, if at all, do you personally eat the following types of food? (At least weekly)

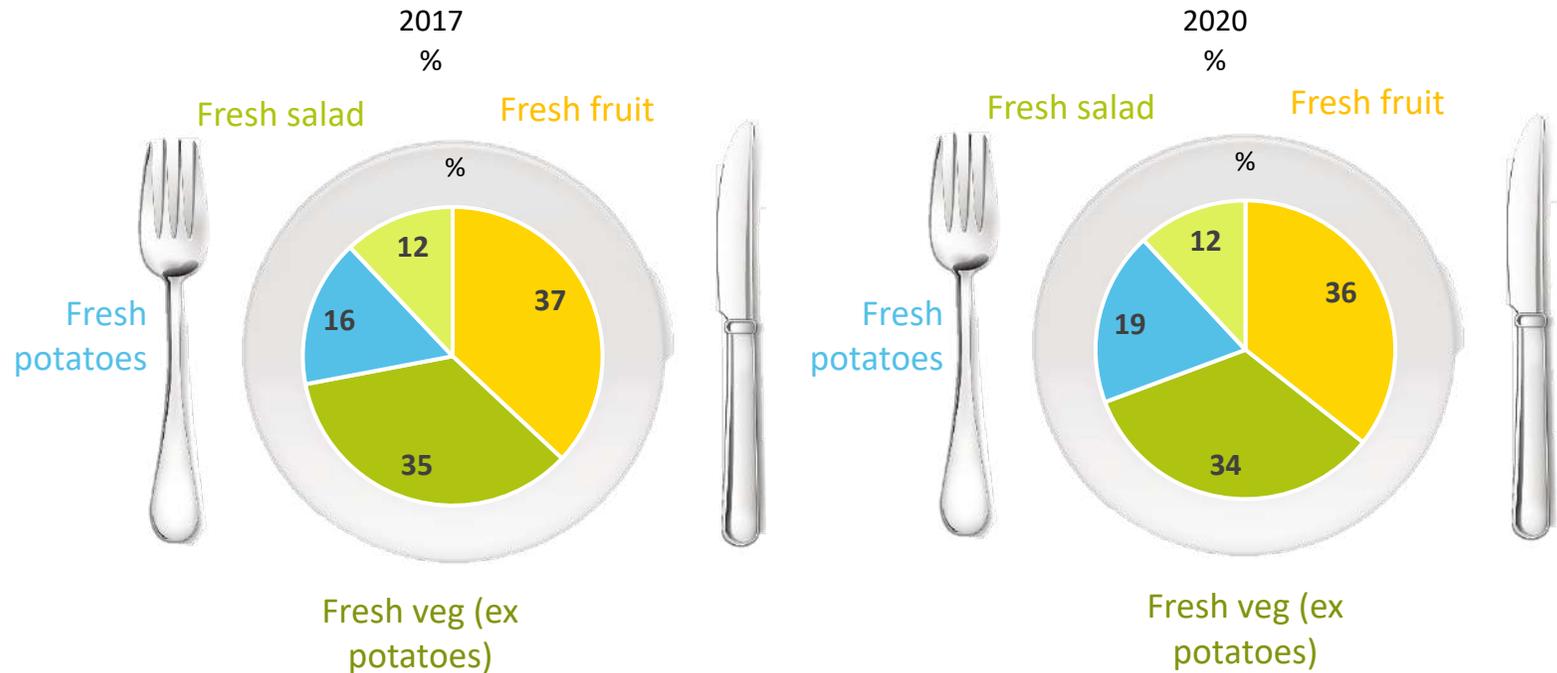
How many portions of fruit and vegetables are consumers eating?

Base: All Participants - 1029

Number of portions eaten in the past 3 days



Of these portions (inc. potatoes), what was the share of...

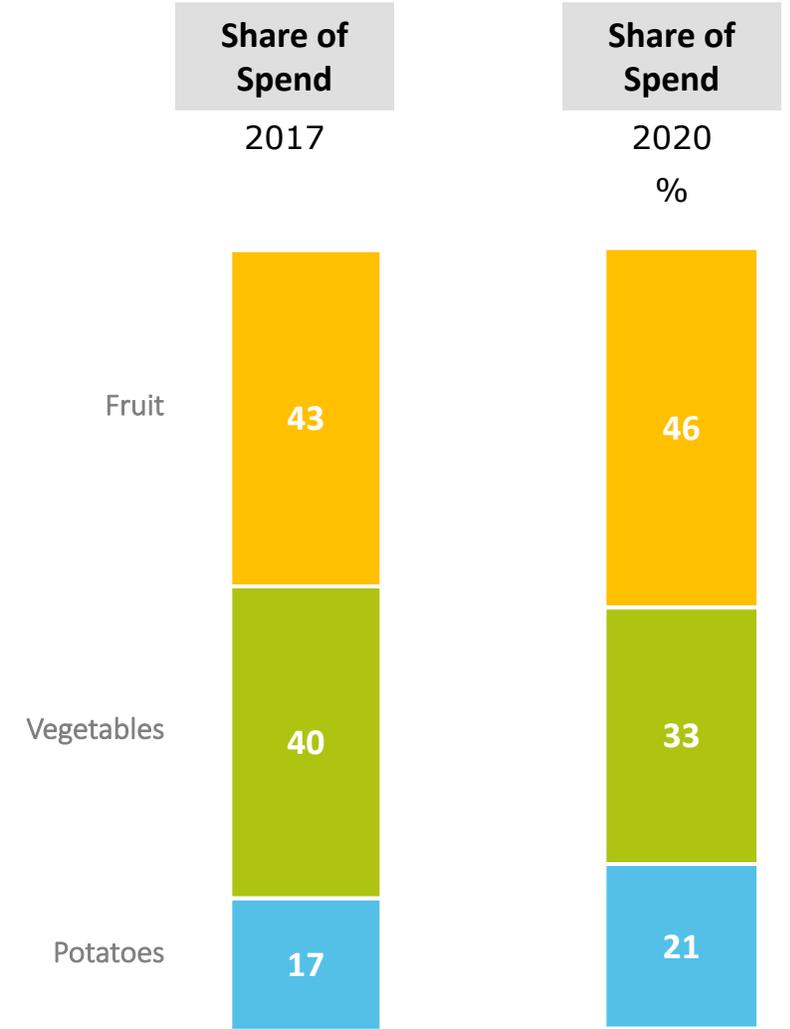
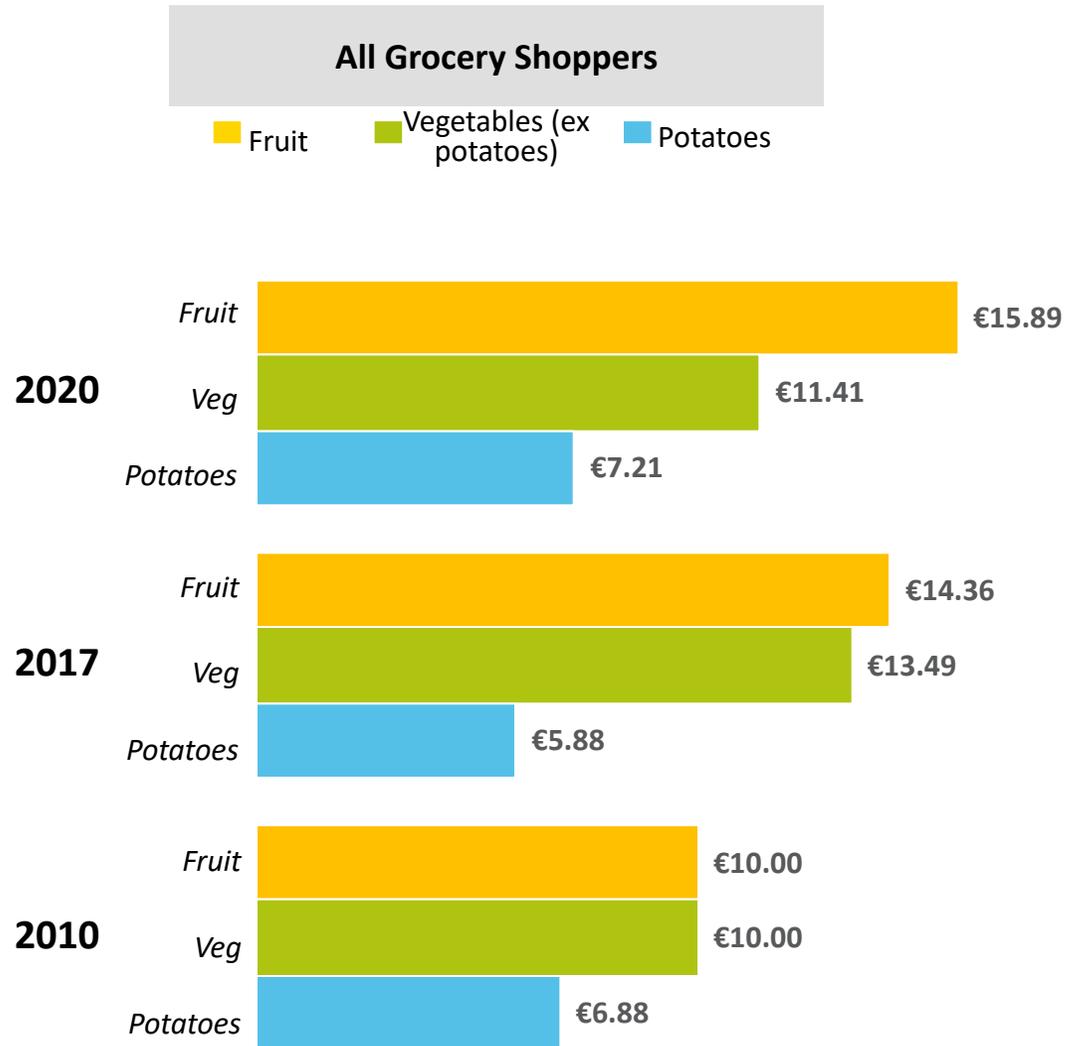


The volume of portions of fruit, vegetables and salads, as well as the share of total fresh volume accounted for, by individual food types are practically identical in 2020 compared to 2017.

Q.9 Over the past three days, how many portions of fruit, vegetables and salads would you think you consumed in total?
 Q.10 And how many of these _____ (NUMBER GIVEN @Q.9) portions were:

Average spend on fresh produce

Base: All Participants - 1029



Q.2 On average, how much would you spend on fruit and vegetables and potatoes for your household in a typical week

The average weekly spend on fruit now stands at 15.89 per week, vegetables at €11.41 and potatoes at €7.21.

The overall reported weekly spend on fresh produce has increased by circa 5% since 2017, with broadly the same relative spend on fruit, potatoes and other vegetables.

Fruit now accounts for 46% share of spend with vegetables at 33% and potatoes 21%



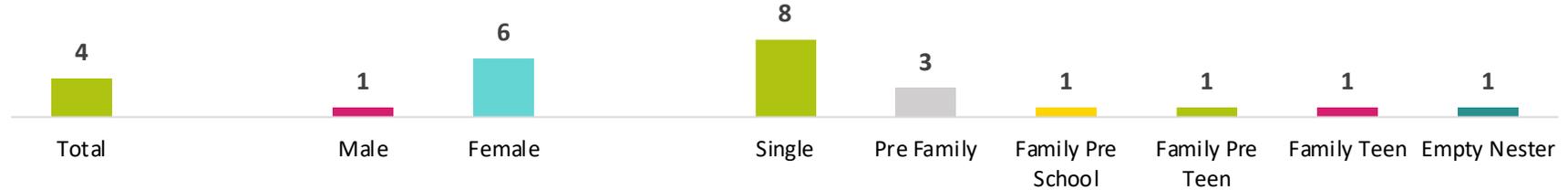
Which of the following do you identify as

Base: All Participants - 1029

Vegan, a person who does not eat animal products of any kind



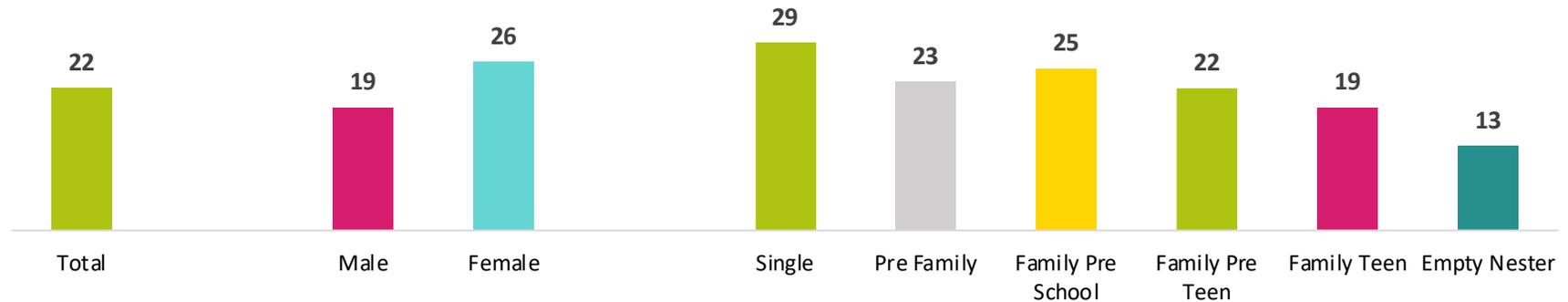
Vegetarian, a person who does not eat meat, poultry or fish



Pescatarian, a person who does not eat meat and poultry but does eat fish



Someone who is consciously reducing the amount of meat, poultry or fish that I am eating



In keeping with other Behaviour & Attitudes Research, just 1% of all Irish adults define themselves as vegan, with a further 4% describing themselves as vegetarian.



Q.16a

Which of the following do you identify as?

The world of fresh vegetables! We eat a lot of them!

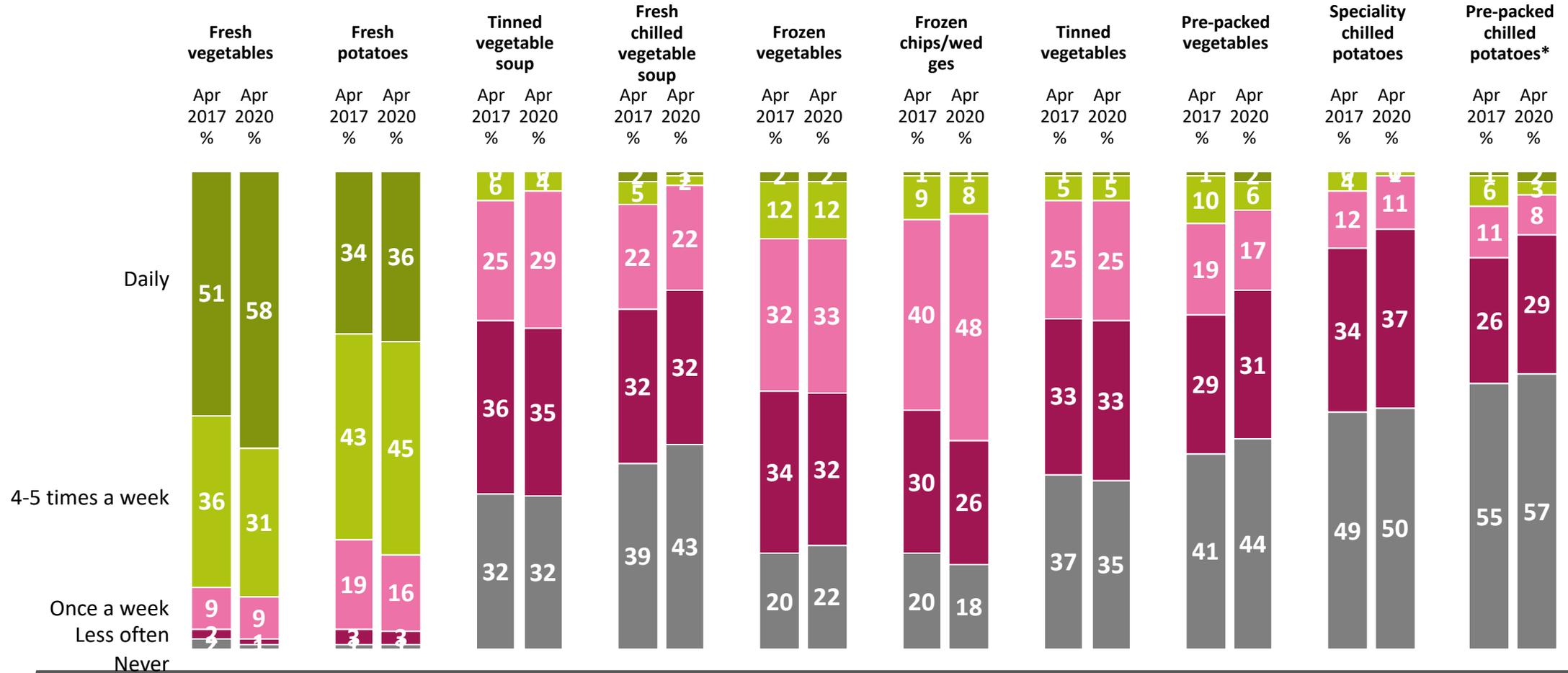


Weekly+ consumption of fresh vegetables is on a par with that recorded in 2017, with some evidence that daily consumption levels have increased.

? Q.1 Using the following scale, how often, if at all, do you personally eat the following types of food?

Vegetables Under the microscope!

Base: All Participants - 1003



At a macro level, reported consumption levels of all categories of fresh, frozen, tinned and chilled vegetables are similar to 2017 levels.

Q.1 Using the following scale, how often, if at all, do you personally eat the following types of food?

The world of fresh potatoes!

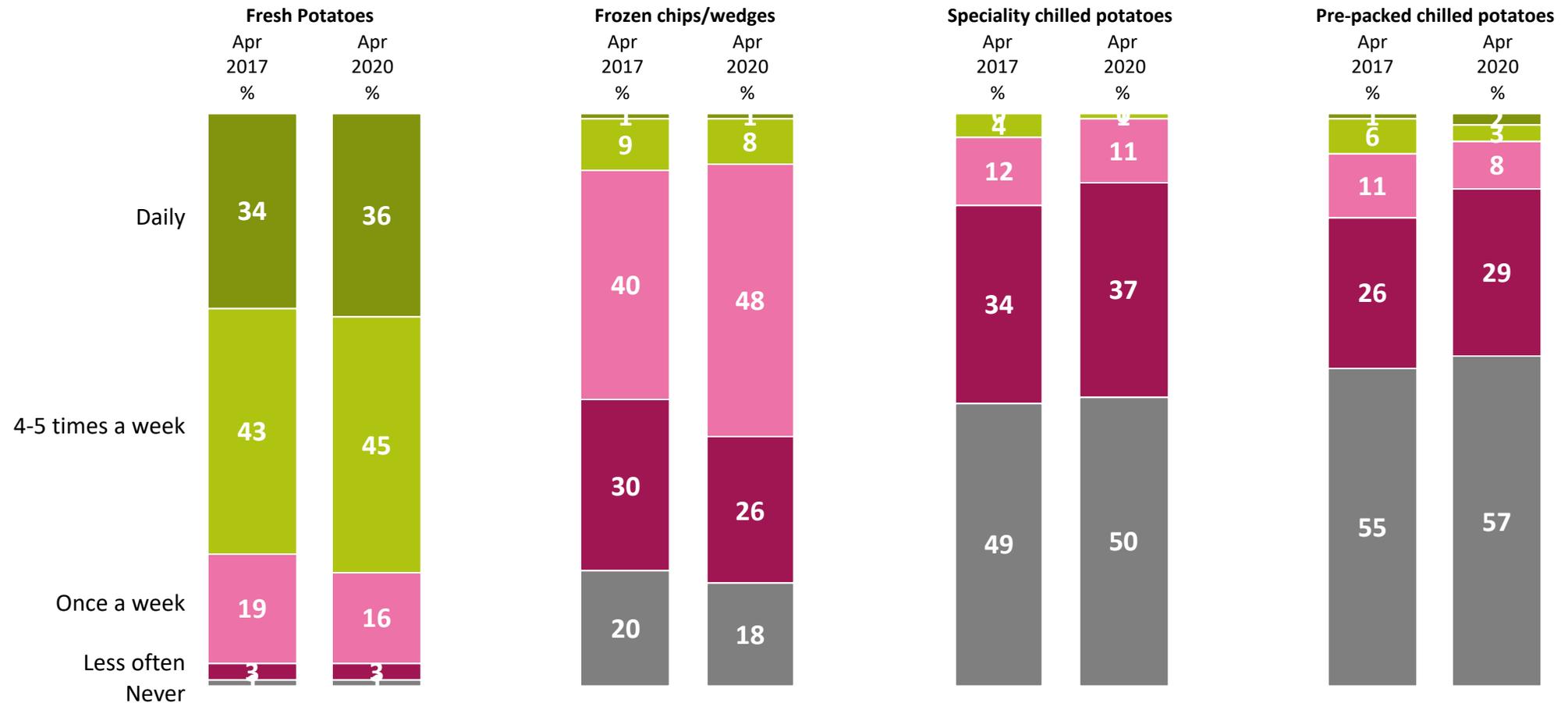


Just over one-third of all Irish adults are currently consuming fresh potatoes on a daily basis.



Q.1 Using the following scale, how often, if at all, do you personally eat the following types of food?

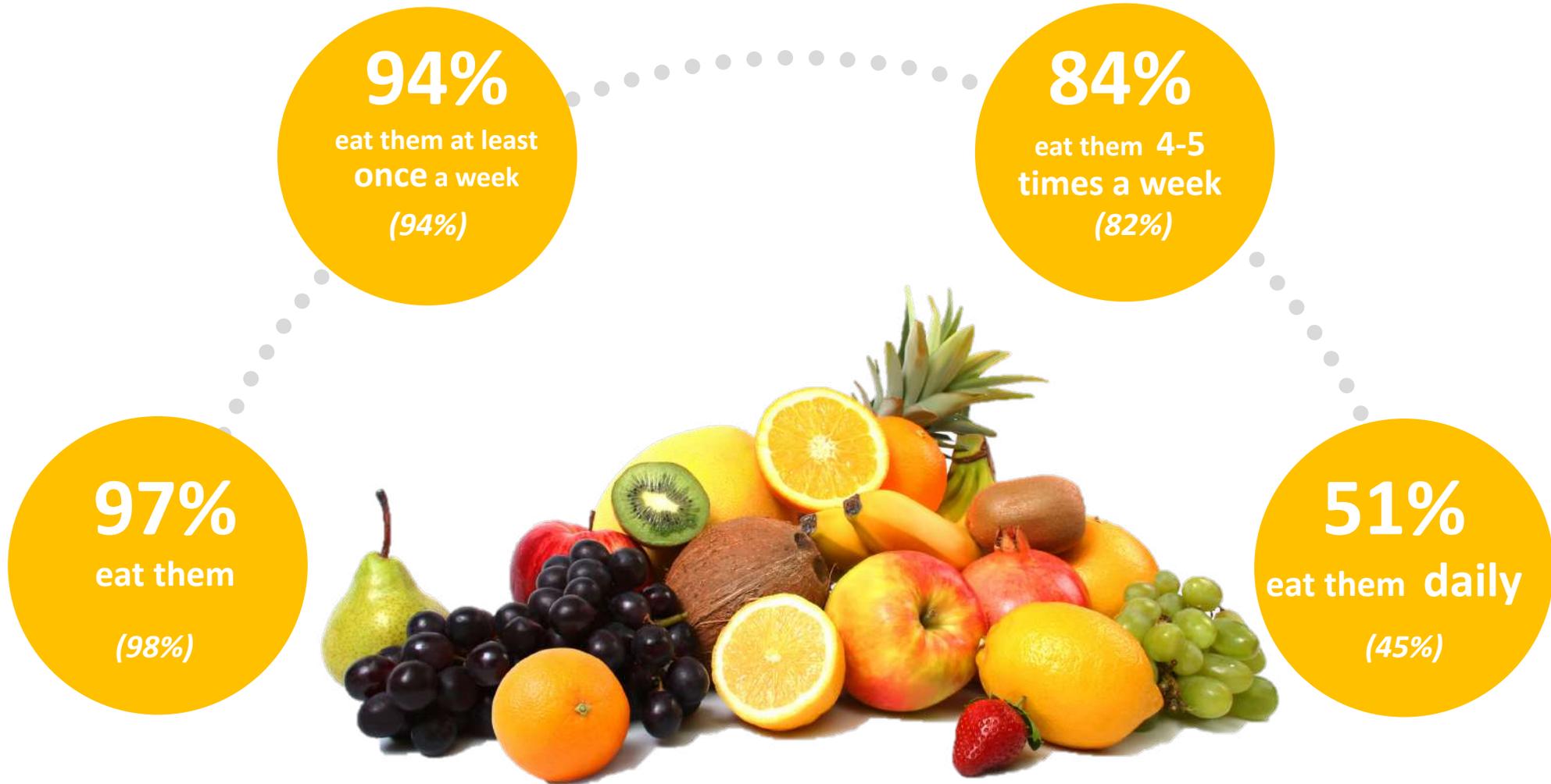
Potatoes under the microscope! In the potato specific world, over half of us include frozen chips in our diet around once a week



Q.1 Using the following scale, how often, if at all, do you personally eat the following types of food?

The world of fresh fruit!

We also eat a lot of fresh fruit



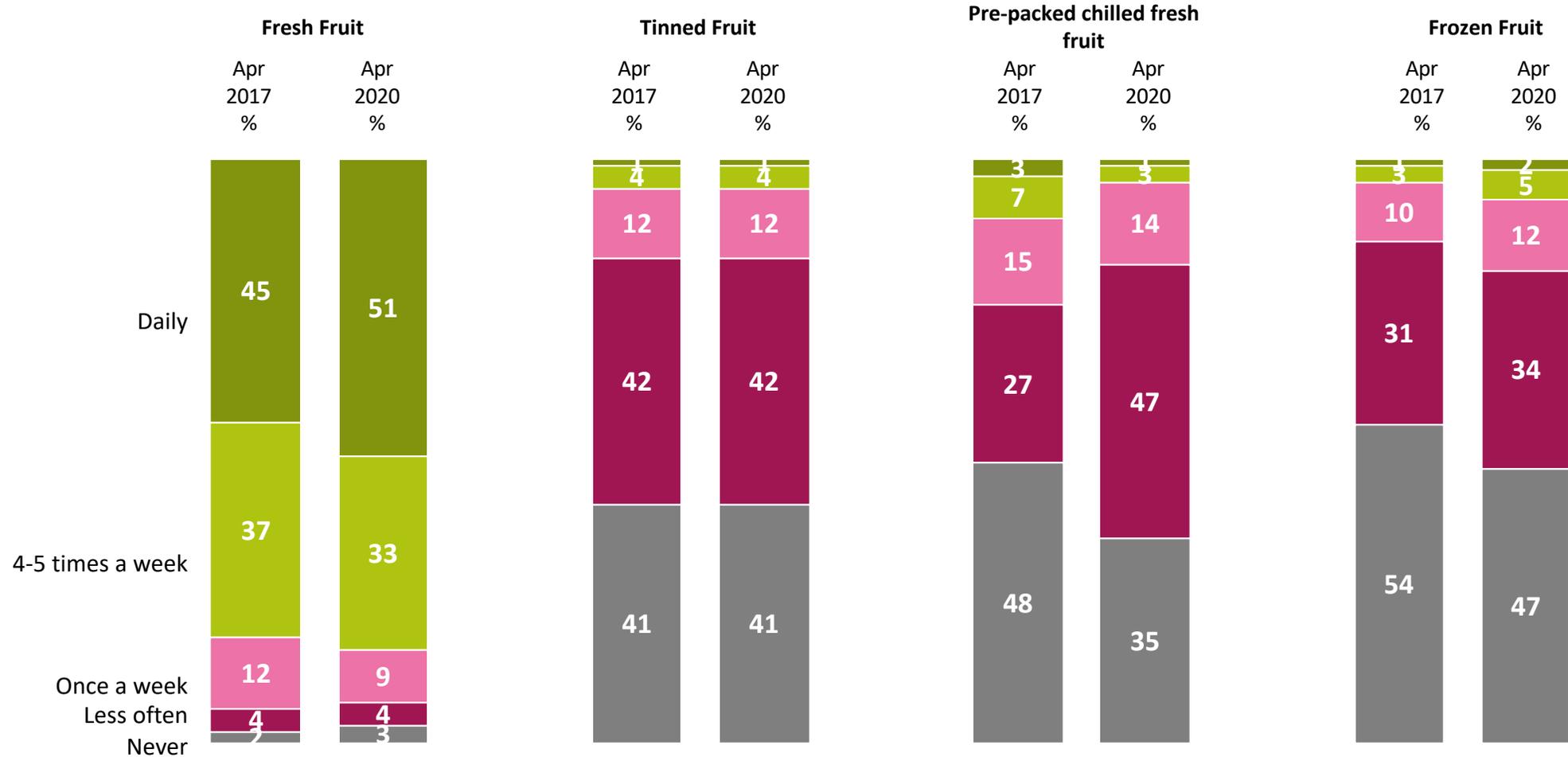
The vast majority of adults consume fresh fruit a number of times a week, with half of us doing on a daily basis (an increase of six percentage points since 2017).



Q.1 Using the following scale, how often, if at all, do you personally eat the following types of food?

Fruit under the microscope!

The focus is very much on fresh fruit.



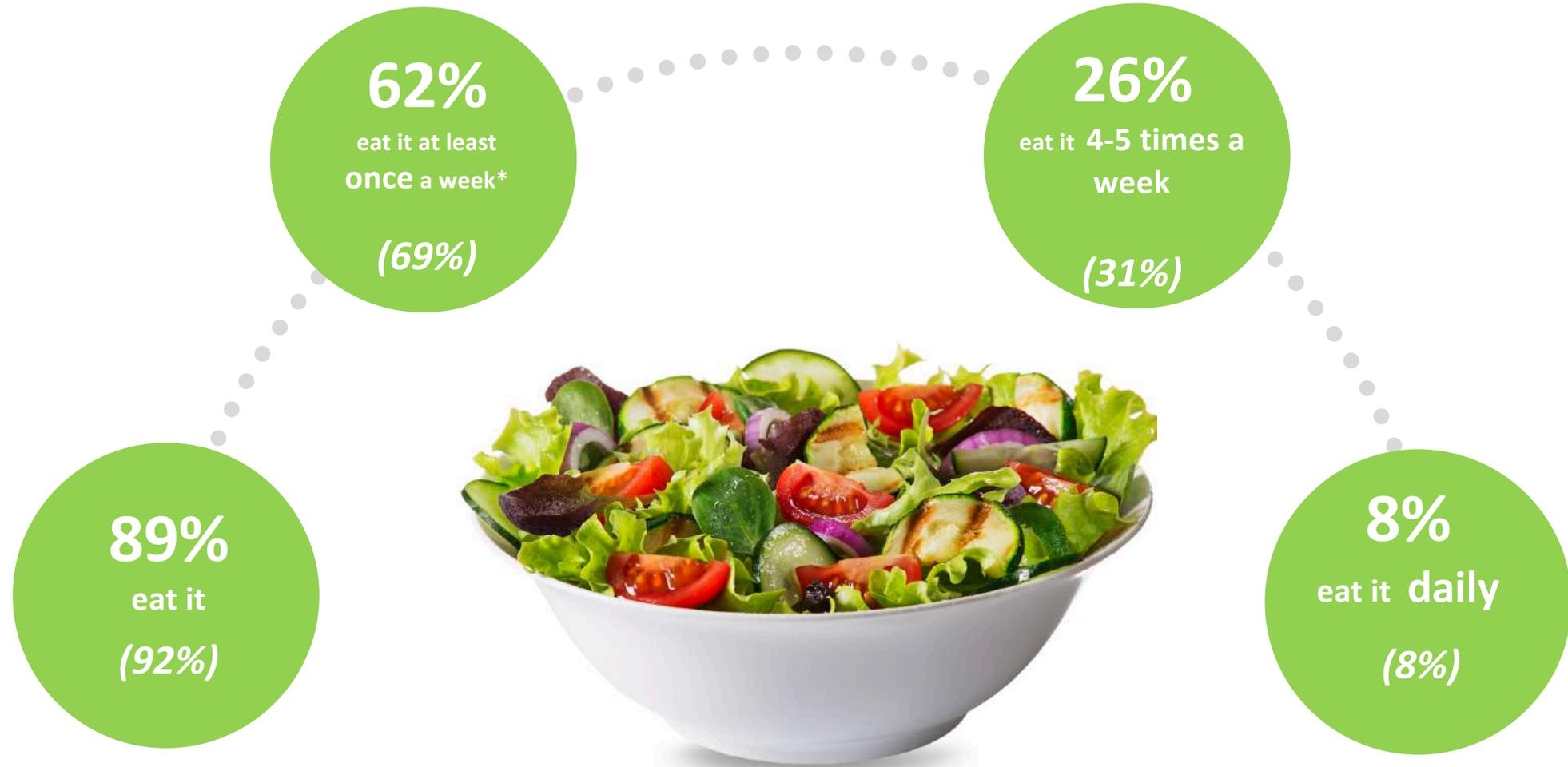
Of all of the fruit categories measured however, the most significant increase in reported consumption levels since 2017 are for pre-packed, chilled fresh fruit, with less significant increases in consumption of frozen fruit also registered.



Q.1 Using the following scale, how often, if at all, do you personally eat the following types of food?



The world of fresh salads!



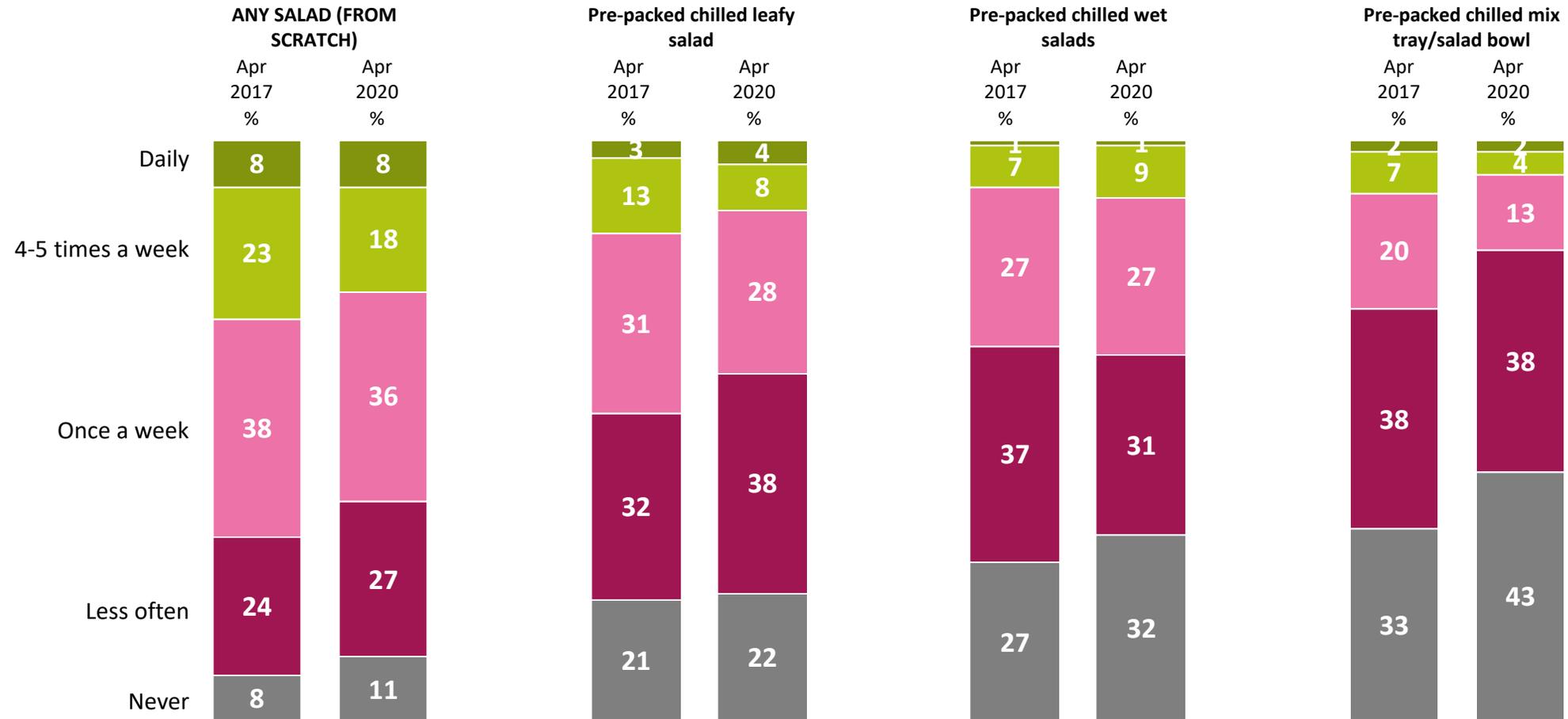
A quarter of Irish adults consume salad from scratch four to five times a week, with a further 8% doing so on a daily basis.

? Q.1 Using the following scale, how often, if at all, do you personally eat the following types of food?

*62% salad from scratch

Salads under the microscope!

If anything, frequency of consumption of salads has slipped marginally since 2017



Q.1 Using the following scale, how often, if at all, do you personally eat the following types of food?





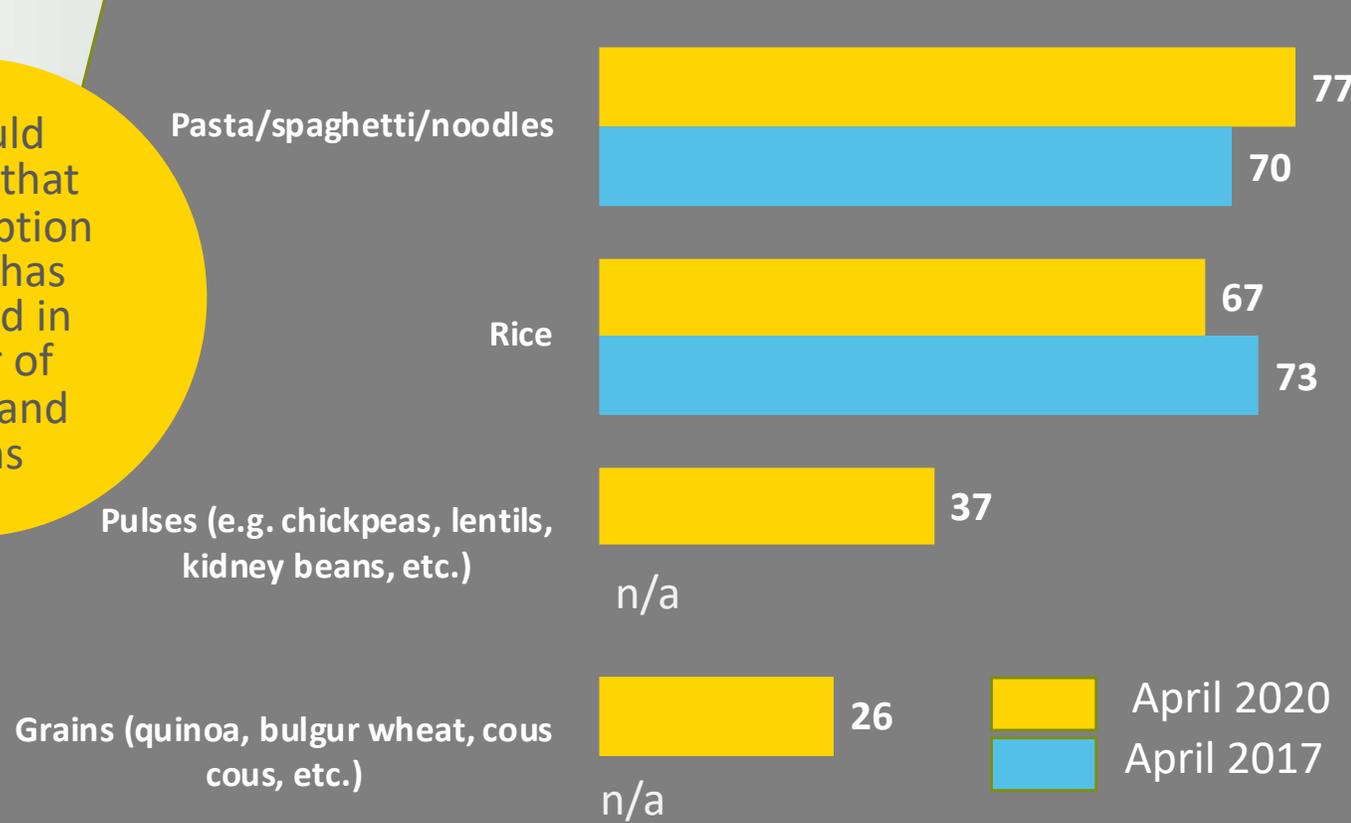
It would appear that consumption of rice has declined in favour of pulses and grains

Alternative carb consumption



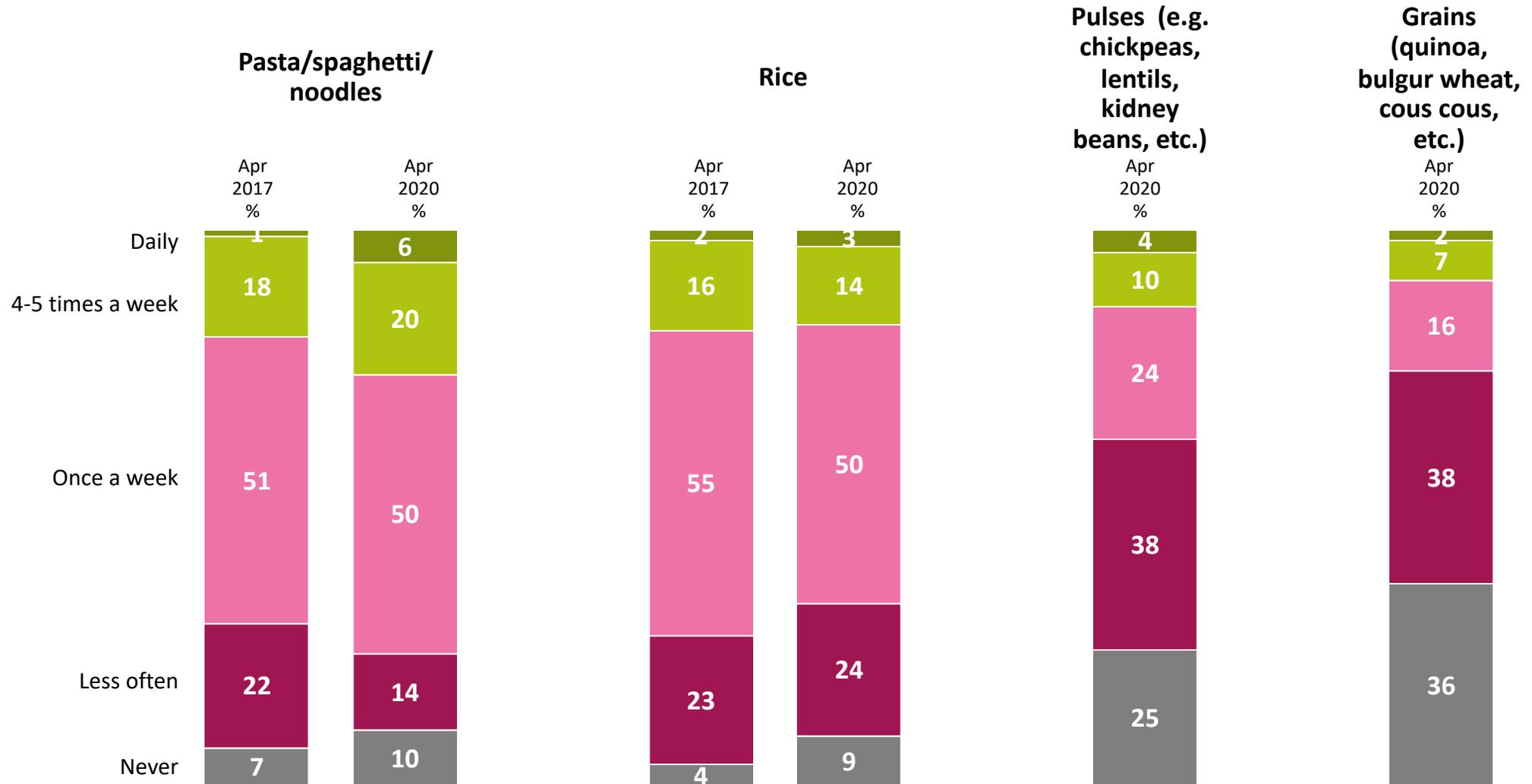
Base: All Participants - 1029

Eat at least once a week – April 2020



Q.1 Using the following scale, how often, if at all, do you personally eat the following types of food? (At least weekly)

Pasta and grains under the microscope!



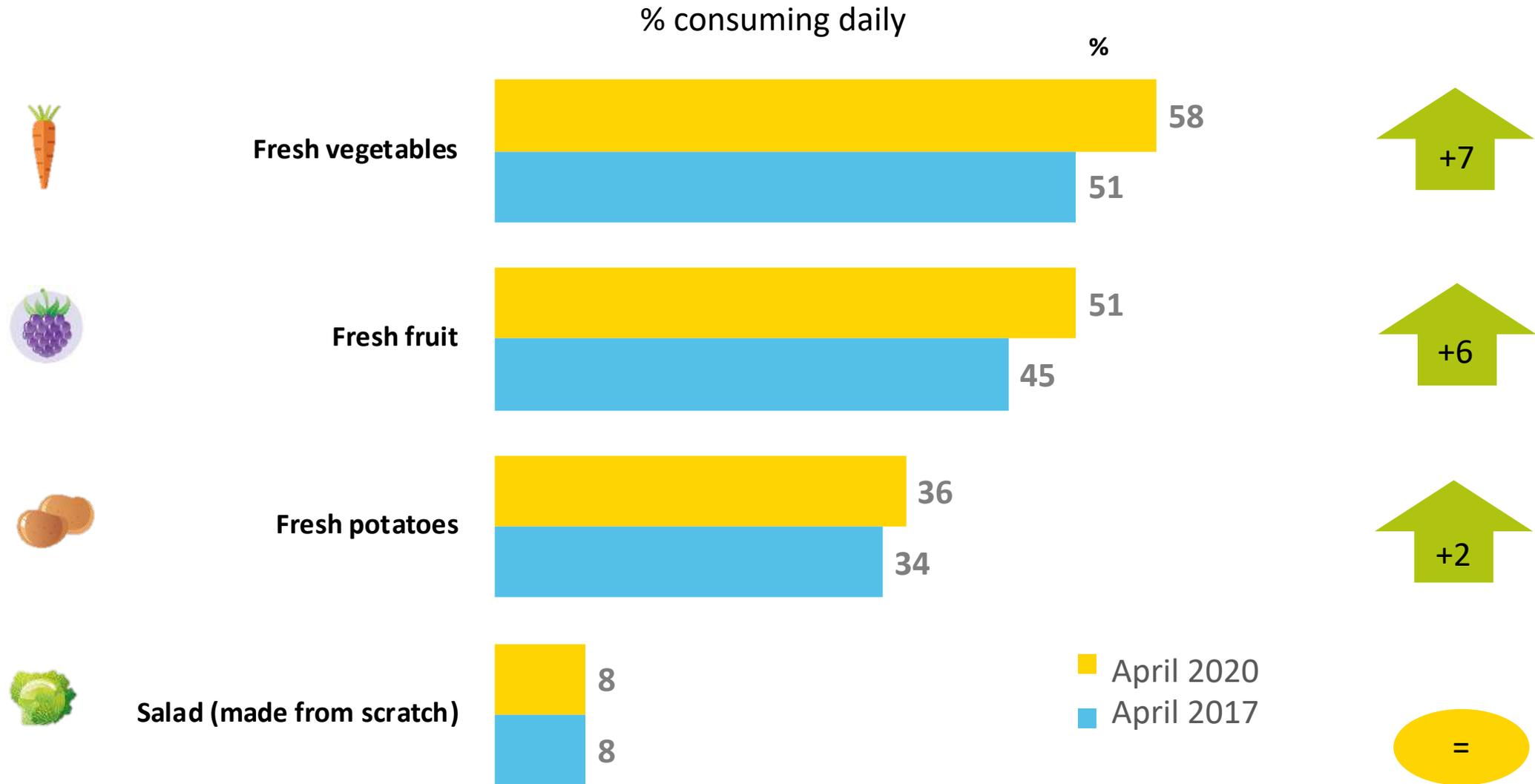
With almost four in ten adults now consuming pulses on a weekly basis.



Q.1 Using the following scale, how often, if at all, do you personally eat the following types of food?



The Daily Fresh Diet is dominated by fresh vegetables and fruit



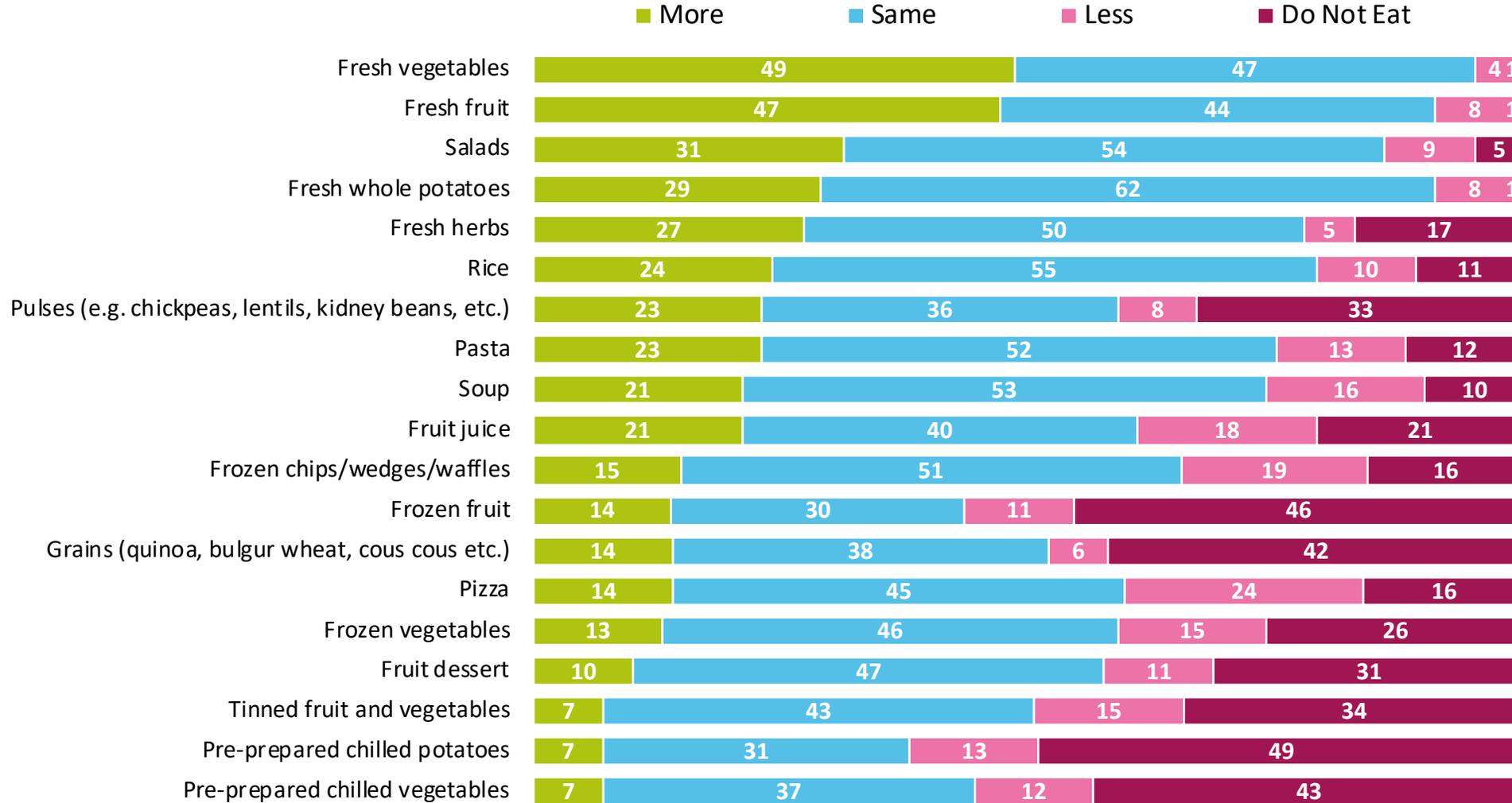
Q.1 Using the following scale, how often, if at all, do you personally eat the following types of food?

How has our consumption pattern changed?

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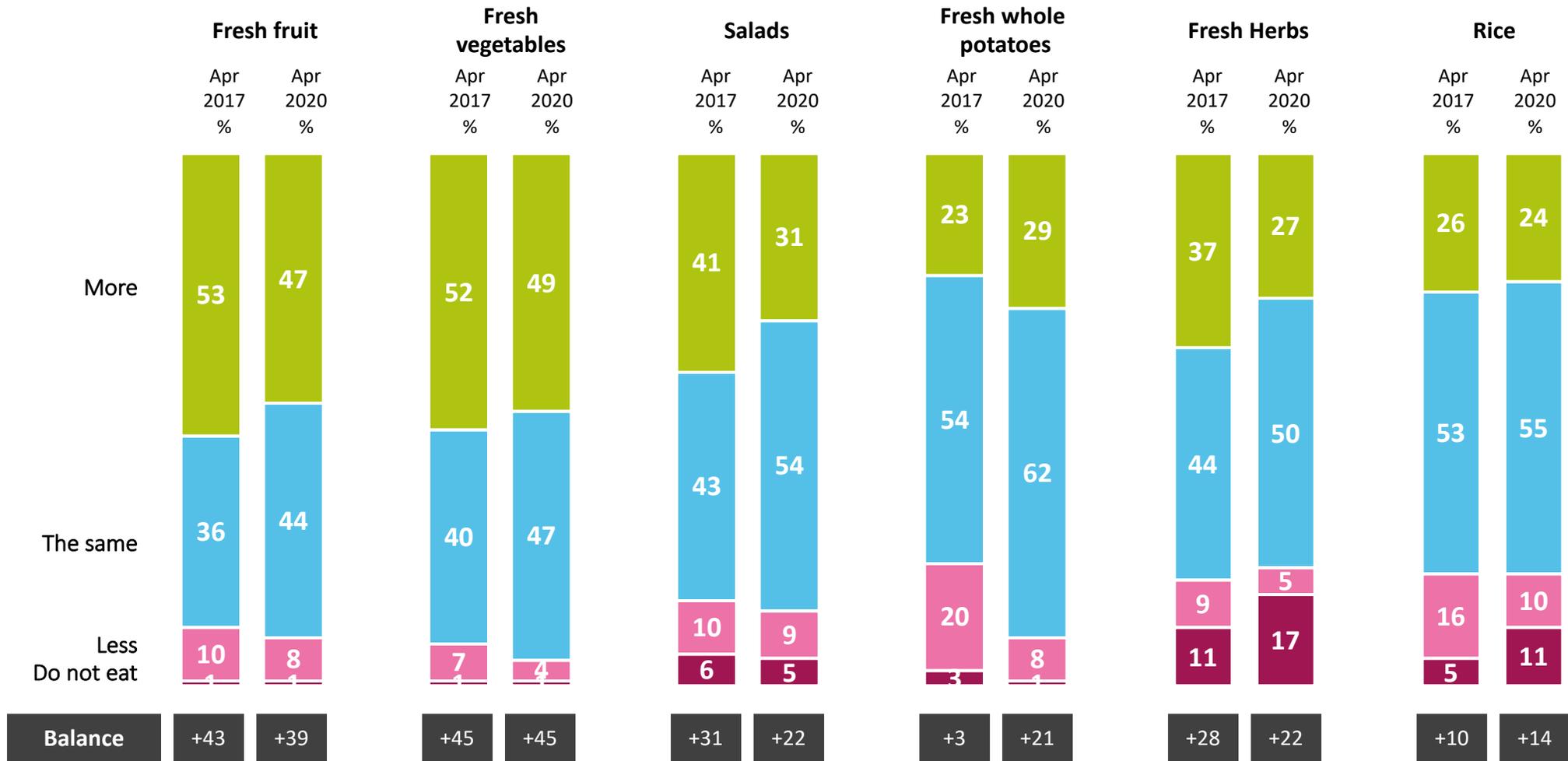
Types of food eating more or less of compared to 3 years ago



As has been the case with previous research, significantly more consumers are inclined to report that they are eating more fresh vegetables, fruit, salads and potatoes compared to a number of years ago.

Q.3 Would you say you are eating more, less or the same amount of the following nowadays compared to 3 years ago?

Perceptions about their own consumption behaviour

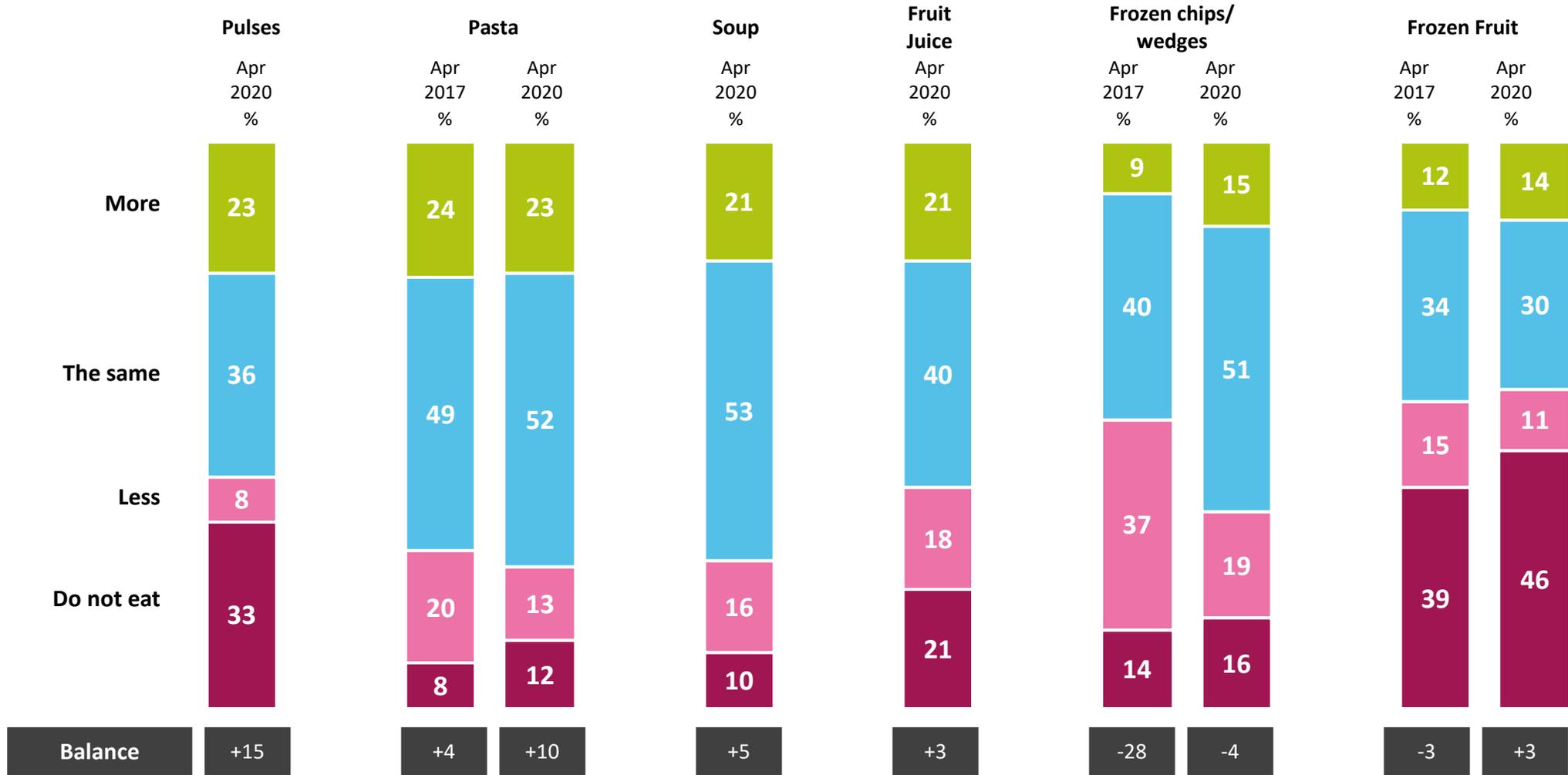


The net difference between those reporting they are consuming more, and less, of each key fresh food type suggests a slowing of momentum for salads and fresh herbs, and a slightly increased impetus behind fresh whole potatoes.



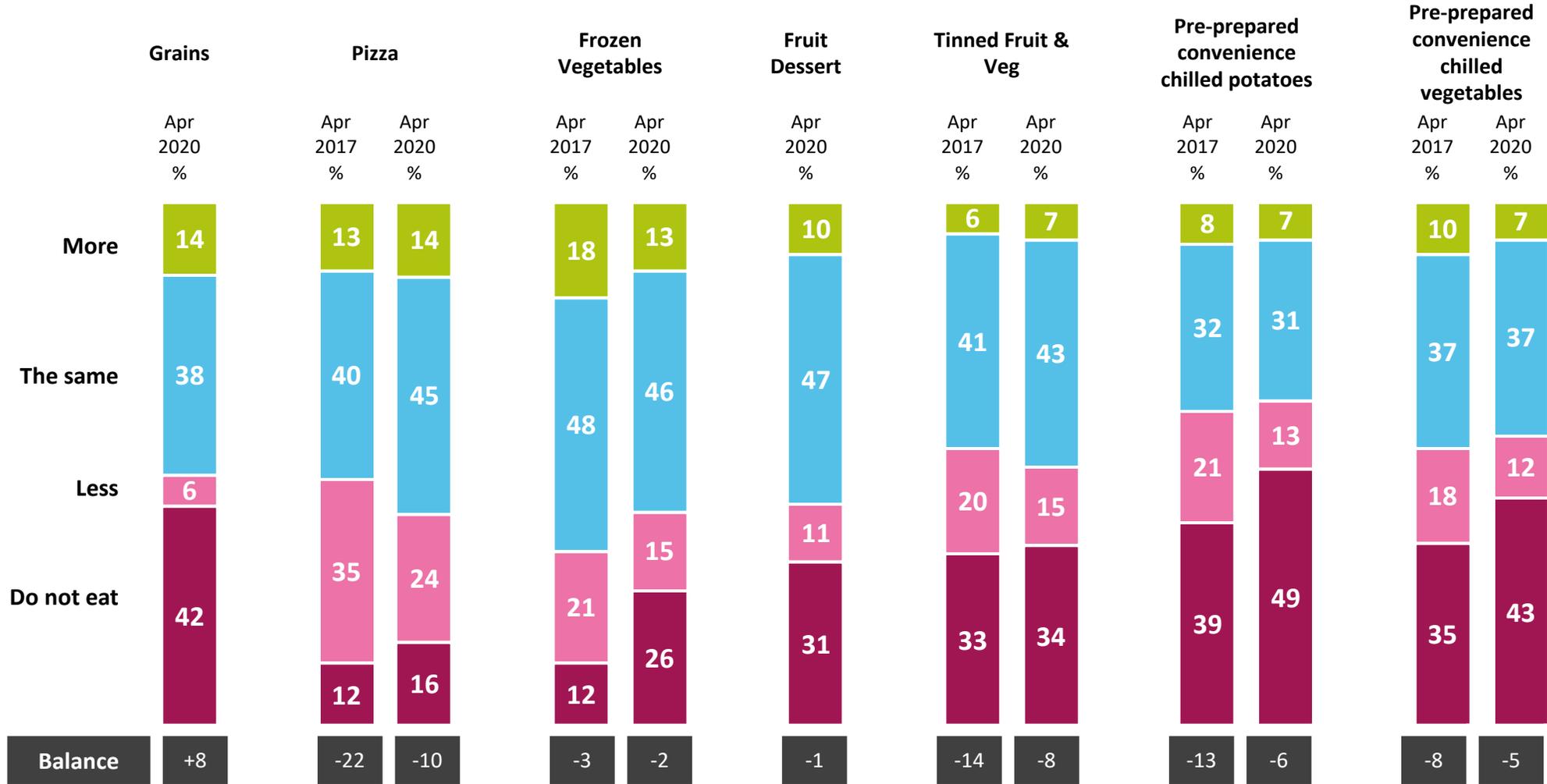
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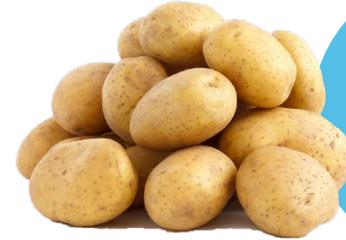


Q.3 Would you say you are eating more, less or the same amount of the following nowadays compared to 3 years ago?

Who says they are eating more ?



55% aged U34 yrs; 56% aged 65+, 54% Dublin, 54% single.



37% female; 47% U 34 yrs; 41% Dublin, 39% single; 38% Family Pre school



59% aged U34 yrs; 62% Dublin, 55% single, 56% pre-family, 57% Family pre school.



43% U34 yrs; 43% Dublin; 40% single.

Reported increases in consumption of fresh foods over-index amongst those aged under 34 years, resident in the Dublin area, and in single person or early stage family households.

? Q.3 Would you say you are eating more, less or the same amount of the following nowadays compared to 3 years ago?

Sources used and trust for nutrition/healthy eating advice

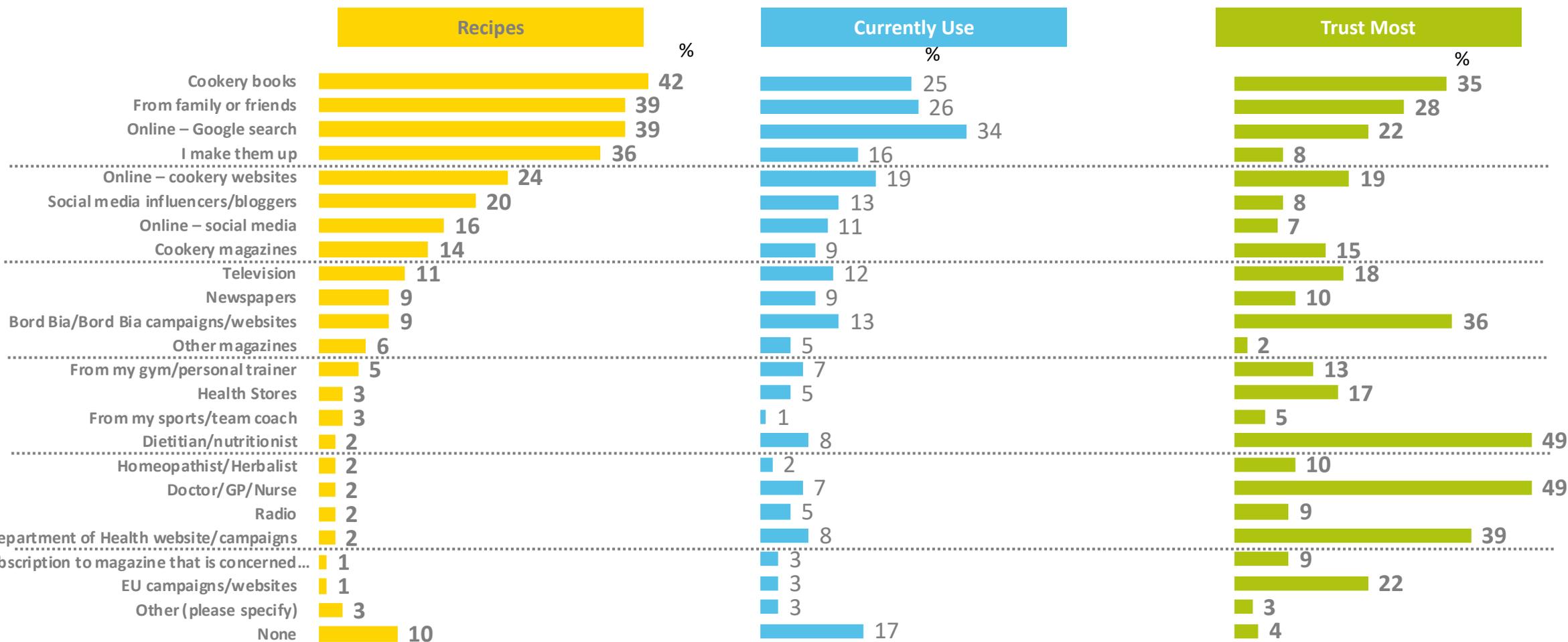
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Sourced used and/or trusted for nutrition/healthy eating advice



Base: All Participants - 1029



The most common sources of recipes are cookery books, friends/ family, online search or personal experimentation. Books, family/friends and search activity are also the most frequently used sources of information for nutrition and healthy eating. The most trusted sources of information for nutrition and healthy eating are health professionals, the Department of Health and Bord Bia.



Q.13 Thinking about cooking, either day-to-day or for a special occasion, where do you get your recipes?

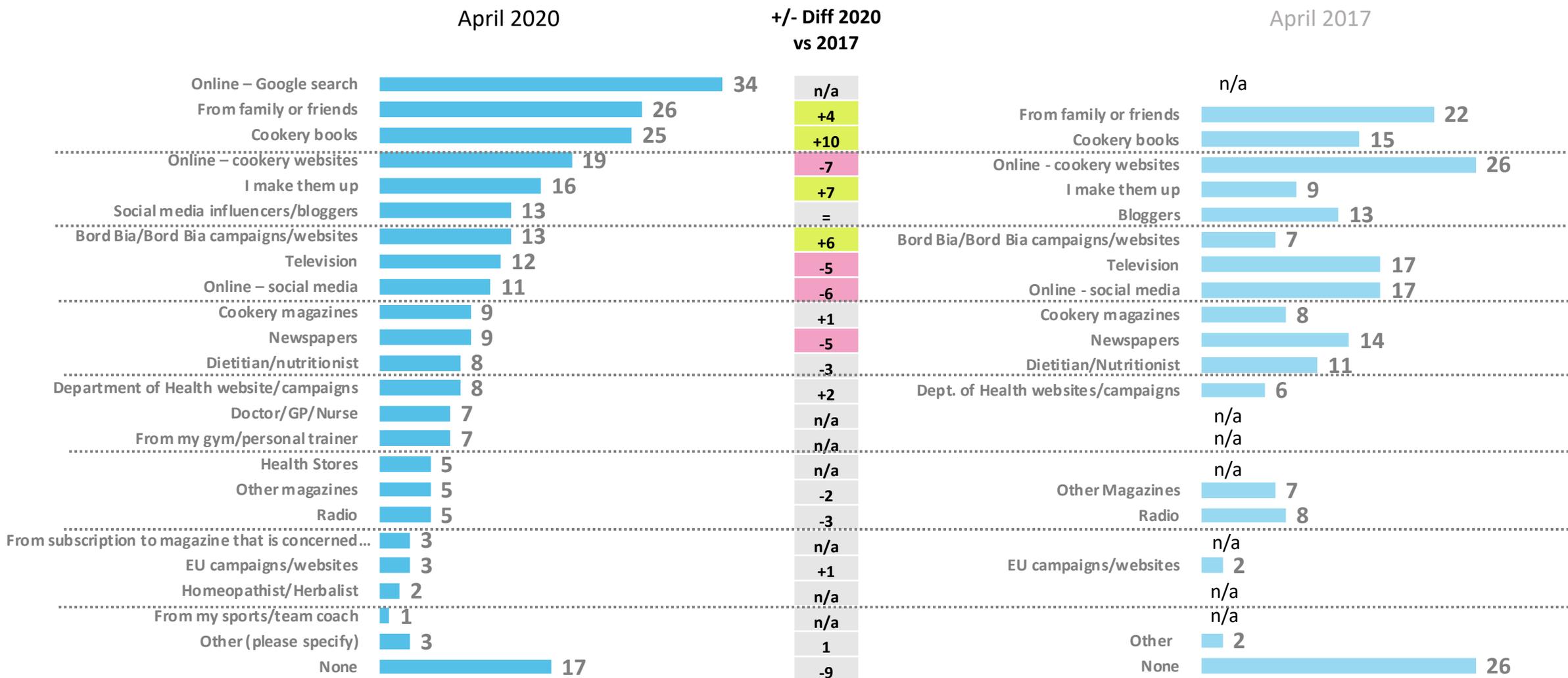
Q.14 And now thinking specifically about information relating to nutrition and healthy eating, which of the following sources do you currently use?

Q.15 And finally, thinking about information relating to nutrition and healthy eating, which of the following sources would you trust?



Sources used for Nutrition and Healthy Eating

Base: All Participants - 1029



Compared to 2017, there has been an increase in the use of cookery books, personal experimentation, and Bord Bia as sources for nutrition and healthy eating. Conversely, there have been decreases in the use of online cookery websites, television and social media for such purposes.

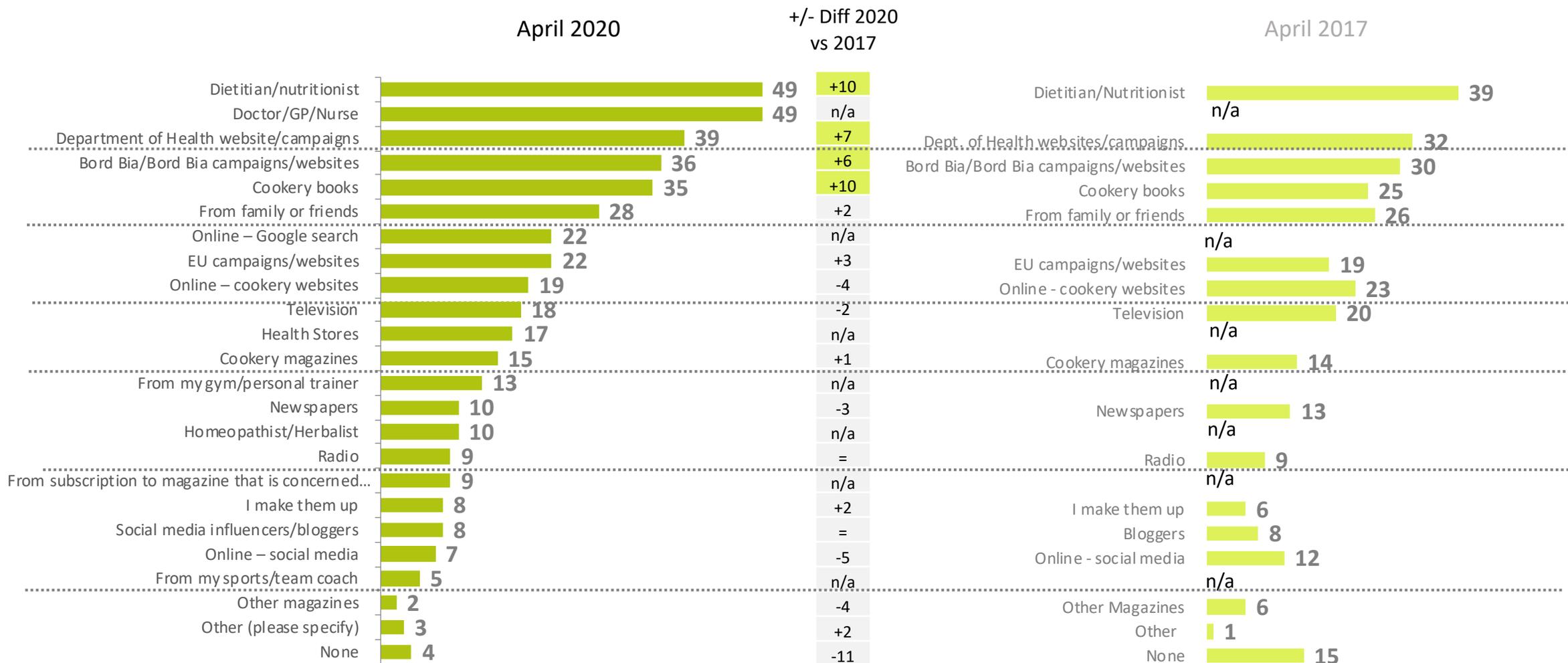
Q.14 And now thinking specifically about information relating to nutrition and healthy eating, which of the following sources do you currently use?



Sources Trust Most for Nutrition and Healthy Eating



Base: All Participants - 1029



Levels of trust in dietitians/nutritionists, Dept of Health website campaigns, and Bord Bia campaigns/websites and cookery books have all increased over the last three years.

Q.15 And finally, thinking about information relating to nutrition and healthy eating, which of the following sources would you trust?



The most trusted source

Base: All Participants - 1029



	Total	Gender		Age			Region				Area		Lifestage					
		Male	Female	-34	35-54	55+	Dublin	Leinster	Munster	Conn/Ulster	Urban	Rural	Single	Pre Family	Family Pre School	Family Pre Teen	Family Teen	Empty Nester
Dietitian/nutritionist	49	37	61	50	44	53	49	48	55	39	50	47	62	42	47	37	50	43
Doctor/GP/Nurse	49	45	53	46	42	60	44	52	52	49	47	53	61	37	40	39	62	48
Department of Health website/campaigns	39	35	44	31	35	53	42	37	44	32	41	37	43	35	39	29	49	41
Bord Bia/Bord Bia campaigns/websites	36	32	39	33	33	41	39	32	40	28	40	28	40	36	32	38	34	31
Cookery books	35	36	34	35	36	34	37	34	39	27	36	33	35	42	30	31	52	35
From family or friends	28	27	28	28	30	25	36	25	22	27	29	26	25	24	31	31	37	26
Online – Google search	22	20	24	24	24	17	26	22	19	20	22	21	12	44	17	28	35	21
EU campaigns/websites	22	18	25	27	22	16	27	18	21	19	25	15	22	28	36	17	29	12
Online – cookery websites	19	18	20	21	19	19	26	19	15	16	22	15	16	30	22	16	32	18
Television	18	20	15	10	22	20	16	17	23	13	20	14	13	9	25	20	32	18
Health Stores	17	13	21	13	14	23	18	15	17	18	15	20	17	17	8	13	30	22
Cookery magazines	15	14	16	15	14	16	20	8	17	13	14	15	11	12	17	15	25	17
From my gym/personal trainer	13	11	16	24	14	2	22	11	13	5	15	9	17	22	15	14	23	2
Homeopathist/Herbalist	10	6	14	12	7	13	11	7	13	10	10	11	13	6	6	10	14	10
Newspapers	10	11	10	8	8	15	17	8	9	5	12	8	9	12	10	11	16	9
From subscription to magazine that is concerned with health	9	5	12	9	6	11	14	9	6	4	10	7	13	10	7	6	19	4
Radio	9	11	8	5	8	15	11	9	8	9	10	9	8	2	9	10	19	12
Social media influencers/bloggers	8	5	10	14	8	1	12	5	7	6	8	8	8	9	16	7	14	2
I make them up	8	9	6	6	7	9	7	9	5	11	8	7	9	2	5	12	2	7
Online – social media	7	6	7	11	7	2	12	5	5	5	7	7	6	9	13	7	19	1
From my sports/team coach	5	5	4	7	5	2	7	5	5	0	5	4	6	2	3	6	19	1
Other magazines	2	1	3	2	3	2	2	1	5	0	2	2	2	1	2	1	15	2
Other (please specify)	3	3	2	1	1	6	3	1	1	8	3	2	1	3	2	4	-	5
None	4	6	3	4	6	3	3	6	3	6	4	6	6	7	4	3	4	4

Bord Bia as a source of information on nutrition and healthy eating is deemed to be especially trustworthy amongst females, those aged 55 years+, as well as those living in urban areas.

Q.15 And finally, thinking about information relating to nutrition and healthy eating, which of the following sources would you trust?



Sources used and trust most for nutrition and healthy eating

Base: All Participants - 1029



TOP SOURCES FOR RECIPES



Cookery books
42%



Followed by

Family & Friends	39%
Online – Google search	39%
I make them up	36%
Online – cookery websites	24%
Social media influencers /bloggers	20%

SOURCES USED FOR NUTRITION/HEALTHY EATING ADVICE



Online Google search
34%



Followed by

Family & Friends	26%
Cookery Books	25%
Online Cookery websites	19%

SOURCES TRUST MOST FOR NUTRITION & HEALTHY EATING



Medical profession

Dietitian/ Nutritionist	49%
Doctor/GP	49%

OTHER INFLUENCERS (TRUST)



Department of Health website/campaigns
39%

Bord Bia/Bord Bia campaigns/websites	36%
Cookery books	35%
From family or friends	28%
Online – Google search	22%
EU campaigns/websites	22%

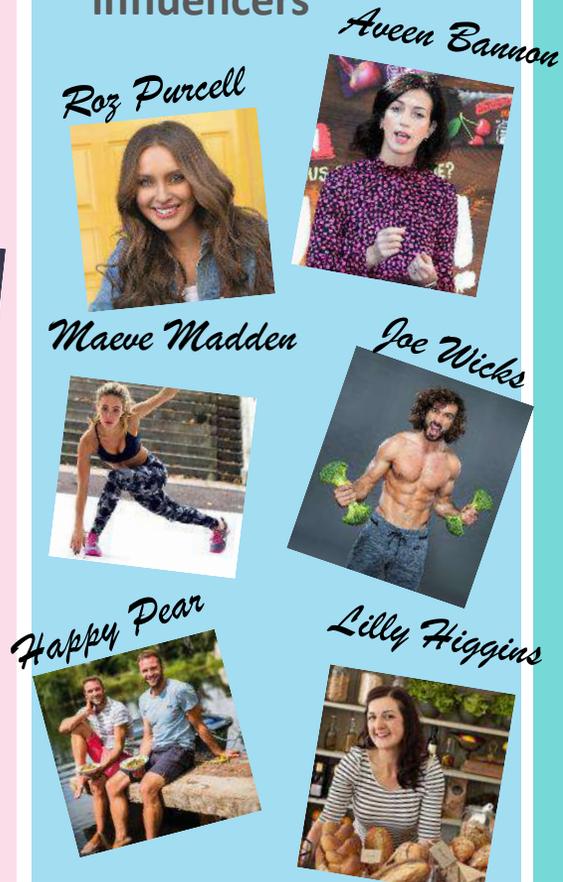
? Q.14 And now thinking specifically about information relating to nutrition and healthy eating, which of the following sources do you currently use?

Inspiration and ideas come from a range of sources

Celebrity chefs



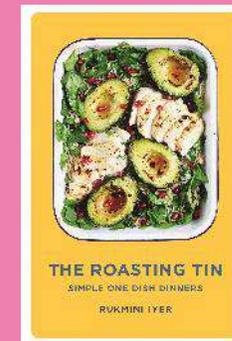
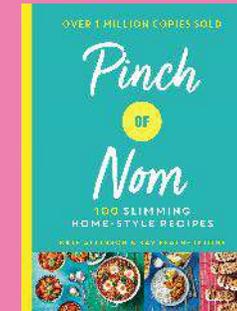
Instagram influencers



Engaging channels



Cookbooks that tap into current trends



Official channels



And of course, things like supermarket recipes, magazines, friends/family, and shows such as Master Chef, Operation Transformation, etc.

Those engaged with food enjoy this ‘inspiration’



HOWEVER

It takes a lot of encouragement to try new recipes.

And even more for these recipes to become a permanent part of the repertoire.

Most of us cook the same 10 – 12 dinners (and 4/5 breakfasts, 6/8 lunches) on rotation.

Which explains why our fresh produce intake remains so habitualised and static (as we saw in the quantitative survey).

Ideas and recipes that cut through must deliver on the following...

Feel achievable

Perhaps a little room for pushing boundaries, but consumers need to feel confident in their ability to successfully deliver.

Grab attention

There needs to be something about the recipe that lifts it from the crowd.

Could be an interesting ingredient, appetising visuals, a catchy name, etc.

Meet family needs

Unlikely to take the plunge with something that the family might not enjoy.

Deliver over and above on taste

Taste is an important driver.

This is just the basic criteria to prompt initial consideration

New recipes that tend to 'stick' in the longer term have some of the following attributes...



Are re-enforced across a number of channels simultaneously

Are twists on familiar classics rather than total reinvention

Are aspirational and all over social media

Encountered during transition periods in cooking/eating

Promise great efficiency/convenience



Operation Transformation
Lidl/SuperValu

Sweet potato Shepherd's Pie
Jamie's beef /butternut stew recipe

Avo on toast
Overnight oats
'That' stew

Slimming World
Weight watchers
Mummy Cooks

Slow cooker
Roasting tin style recipes

The reality of day to day living

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Ideal and Actual Portion Consumption

Base: All Participants - 1029



Ideal Fruit & Veg

Average



Actual Fruit & Veg

Average



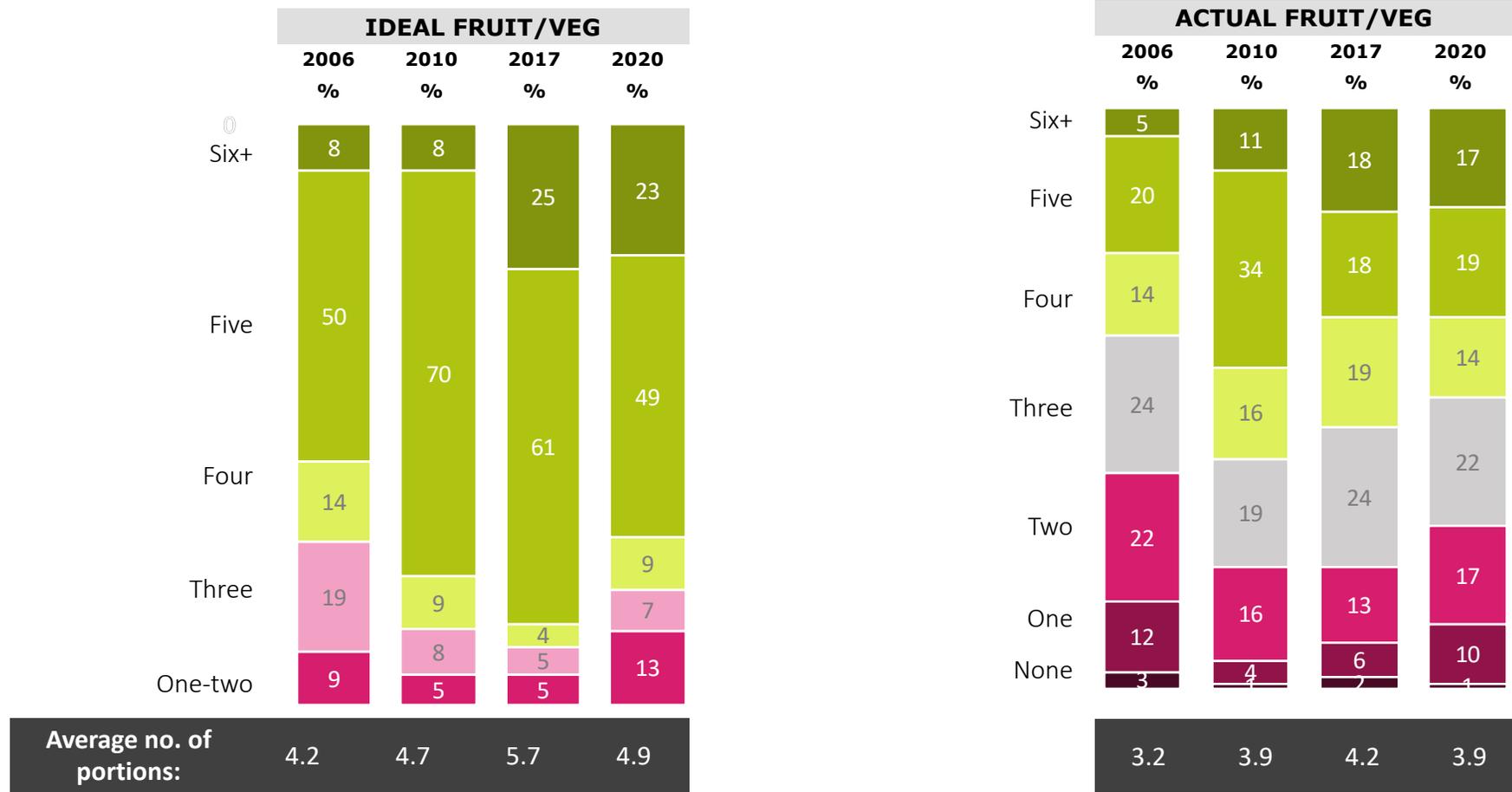
The perceived ideal, and actual consumed daily portions of fruit, vegetables and salads have reverted to 2010 levels, with consumers still consuming less than their perceived ideal amount.

Q.11 With this in mind, how many portions of fruit, vegetables and salads should a person eat per day as part of a balanced diet?
Q.12 And how many portions of fruit, vegetables and salads do you eat in a typical day?

How many portions of fruit and vegetables are consumers eating?



Base: All Participants - 1029



The proportion of consumers who believe the ideal number of daily portions of fruit, vegetables and salads is between 1 and 3 has increased from 14% in 2017 to 29% this year.

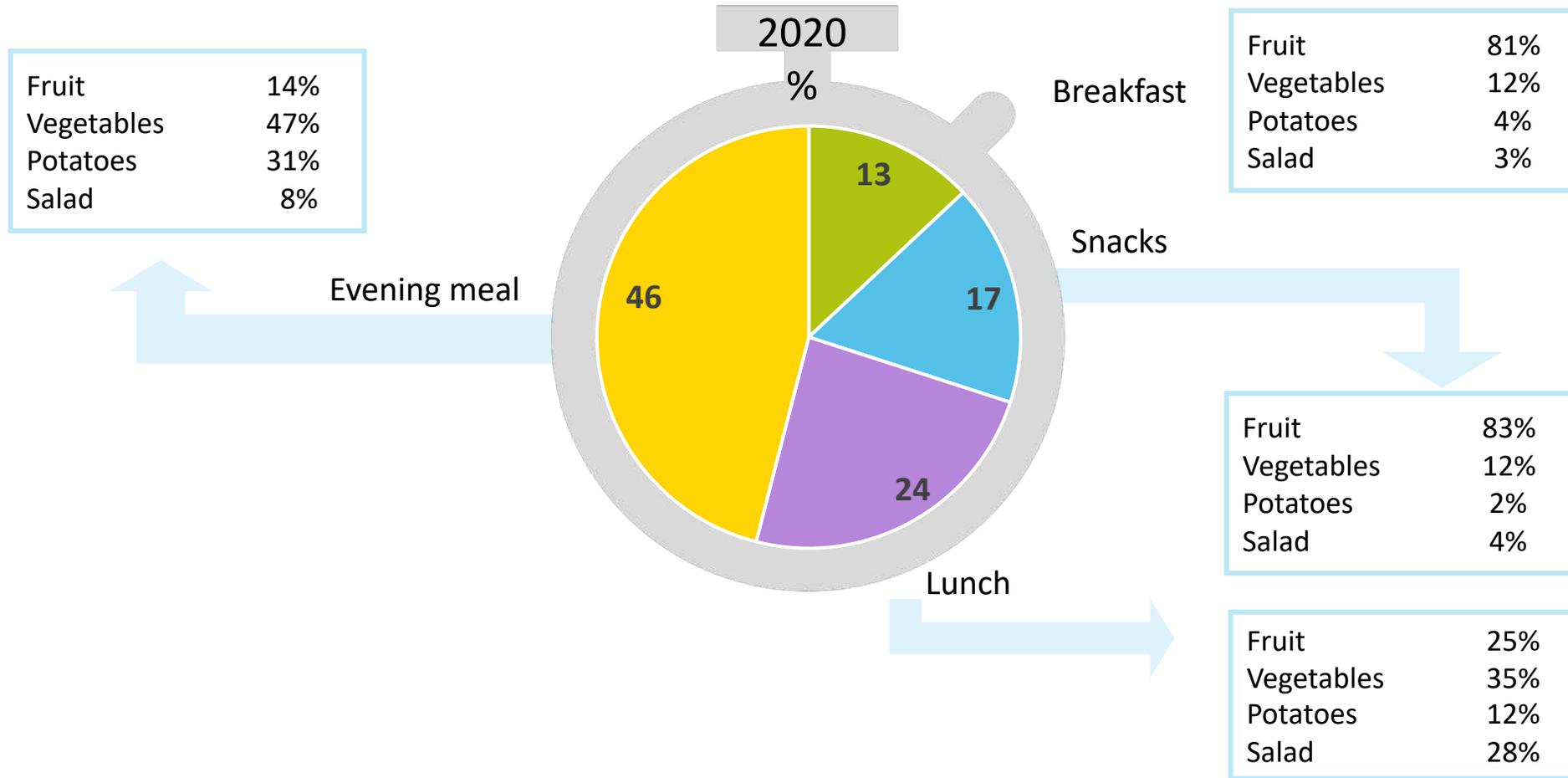


Q.7 With this in mind, how many portions of fruit, vegetables and salads should a person eat per day as part of a balanced diet?

Q.8 And how many portions of fruit, vegetables and salads do you eat in a typical day?

Estimated share of meal occasion

Base: All Participants - 1029



The evening meal occasion accounts for almost half of all fresh food consumption, followed by lunch occasions which account for 24% of all consumption, snacks at 17% of consumption and breakfast which accounts for just 13% of all fresh food consumption.

Overview of fresh produce consumption behaviour - Past 3 days



Base: All Participants - 1029

	TOTAL	Breakfast	Snacks	Lunch	Evening Meal
	2020	2020	2020	2020	2020
	%	%	%	%	%
Fruit	36	81	83	25	14
Vegetables	34	12	12	35	47
Potatoes	19	4	2	12	31
Salad	12	3	4	28	8

Fruit dominates the Breakfast and Snacking occasions, with Salad really only featuring for Lunch.

? Q.11 % Share of portions by time



Organizing and planning our food shopping/consumption takes significant time and mental effort



Particularly for those with busy working schedules



And/or young families

Meal planning is very prevalent among these groups, but means different things to different people. It can be very structured / organized (written meal plans, spreadsheets, apps) or a much looser mental exercise while writing a shopping list or in the supermarket itself

Meal planning is useful in a number of ways



Helps keep to budget

Helps avoid waste

Avoids being 'caught out' without supplies (particularly important right now)

Ensures family needs/preferences are met

Gives shape/structure to family eating

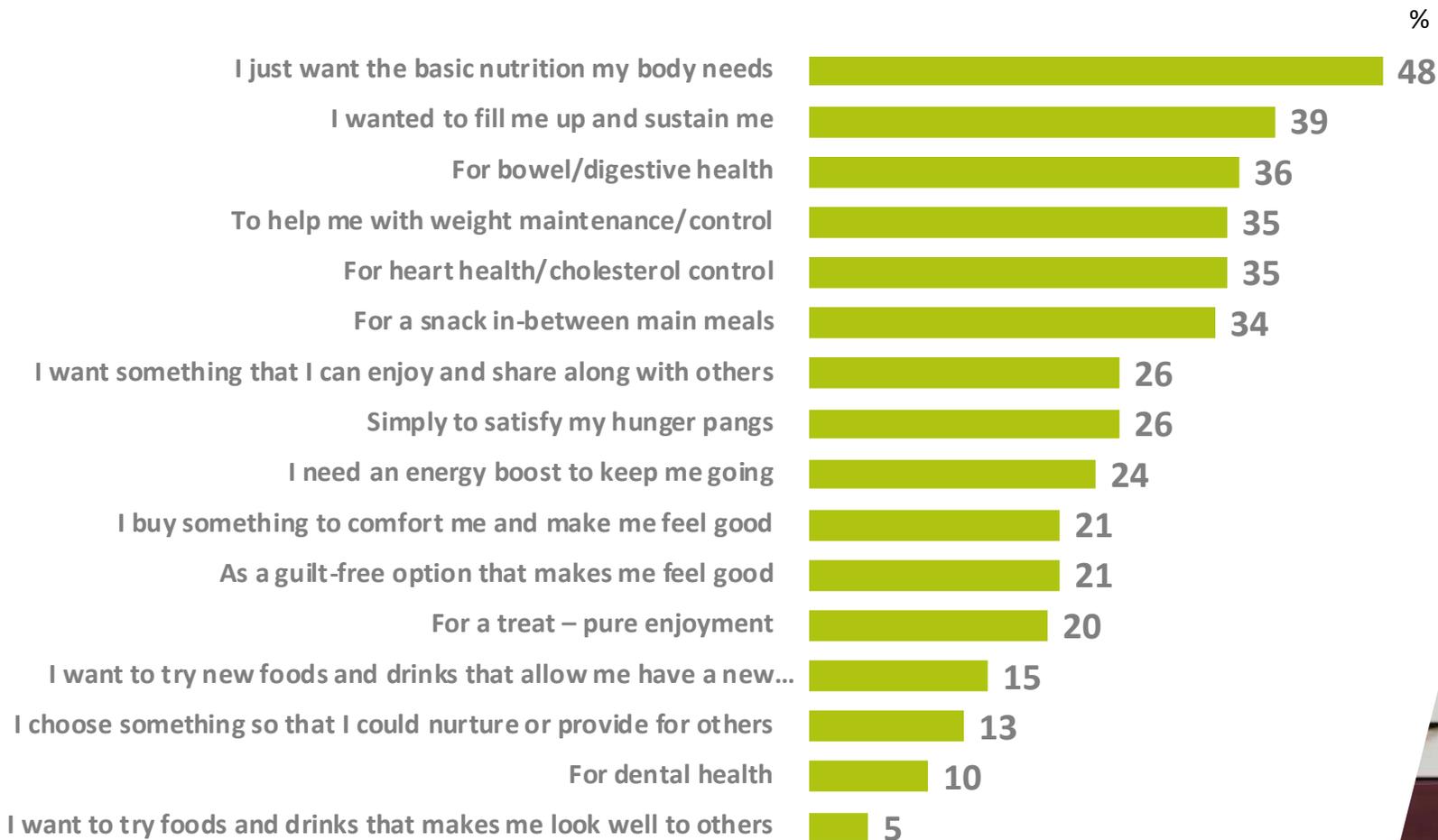
Factors of importance when choosing foodstuffs

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Factors of importance when choosing foods

Base: All Participants - 1029



Q.12 Which of the following are typically important to you when it comes to choosing the specific types of fresh fruit, veg, salads and potatoes to eat?

Factors of importance when choosing foods x Lifestage



Base: All Participants - 1029

	Total	Single	Pre Family	Family Pre School	Family Pre Teen	Family Teen	Empty Nester
	%	%	%	%	%	%	%
I just want the basic nutrition my body needs	48	47	44	50	46	40	55
I wanted to fill me up and sustain me	39	45	48	34	50	29	25
For bowel/digestive health	36	33	28	31	35	25	49
To help me with weight maintenance/control	35	35	36	31	34	34	36
For heart health/cholesterol control	35	32	20	24	26	37	56
For a snack in-between main meals	34	36	25	29	49	38	27
I want something that I can enjoy and share along with others	26	21	19	34	20	47	31
Simply to satisfy my hunger pangs	26	30	32	16	26	22	25
I need an energy boost to keep me going	24	29	10	30	21	12	22
I buy something to comfort me and make me feel good	21	31	16	28	12	12	13
As a guilt-free option that makes me feel good	21	24	23	30	25	16	12
For a treat – pure enjoyment	20	28	21	13	18	22	16
I want to try new foods and drinks that allow me have a new experience	15	16	35	11	13	14	12
I choose something so that I could nurture or provide for others	13	11	4	27	15	13	9
For dental health	10	5	8	3	14	7	20
I want to try foods and drinks that makes me look well to others	5	11	4	1	5	2	2

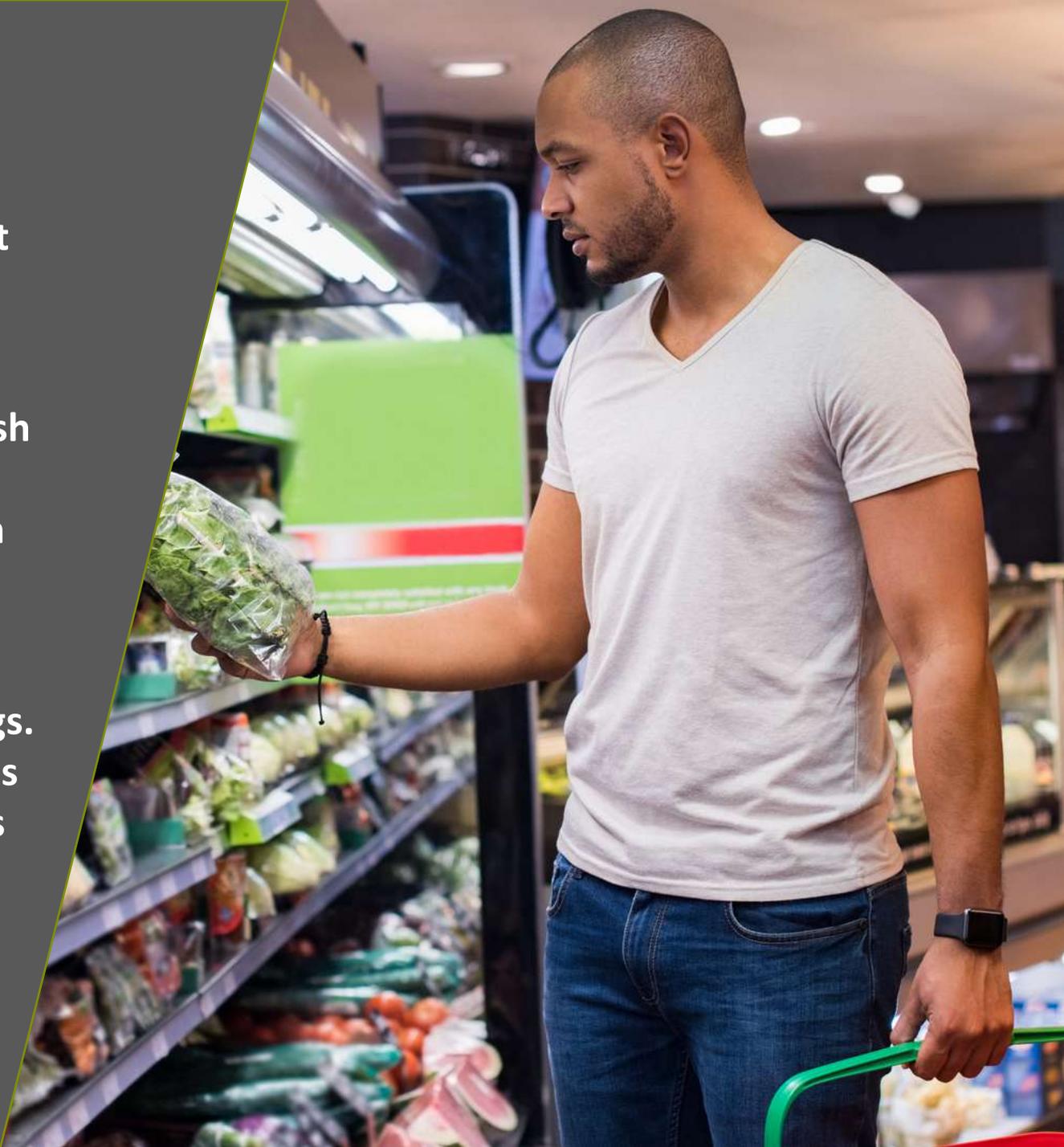


Q.12 Which of the following are typically important to you when it comes to choosing the specific types of fresh fruit, veg, salads and potatoes to eat?



Factors of Importance

- Nutrition, sustenance, bowel/heart health, weight control and snacking are key consumer fresh food requirements.
- Nutrition is most important to empty nesters. Fresh foods as a source of sustenance peaks amongst those at the single, pre-family and family pre-teen lifestages.
- The consumption of fresh food for weight control purposes is consistent across all lifestage groupings. The fresh foods bowel/heart health requirement is greatest amongst empty nesters, while snacking is highest amongst the family pre-teen life stage grouping.

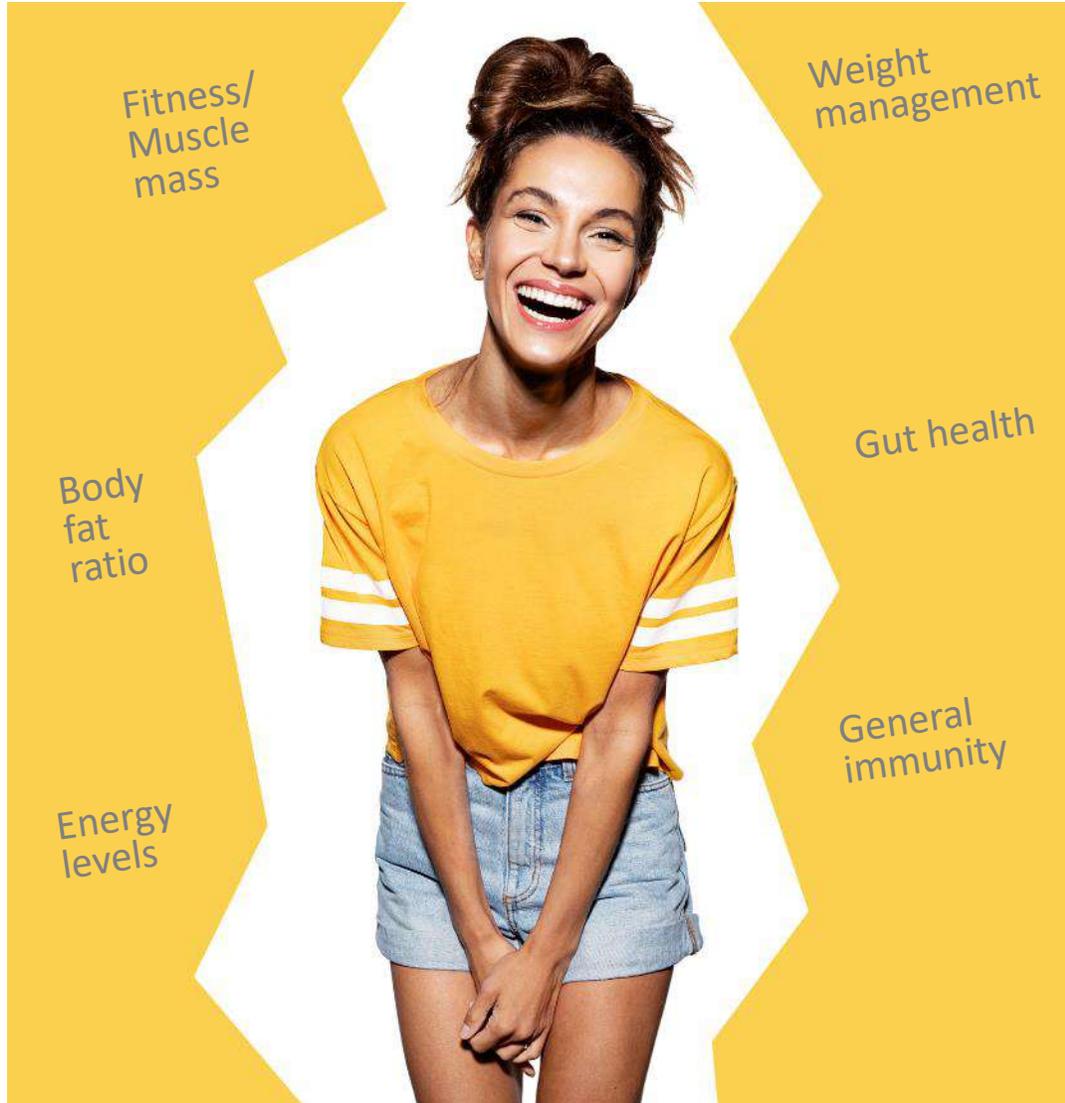


Health concerns have proliferated and broadened over the last few years and vary across age groups



Younger customer

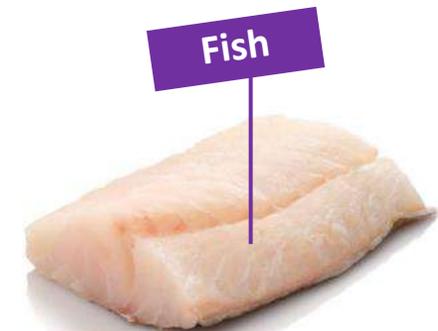
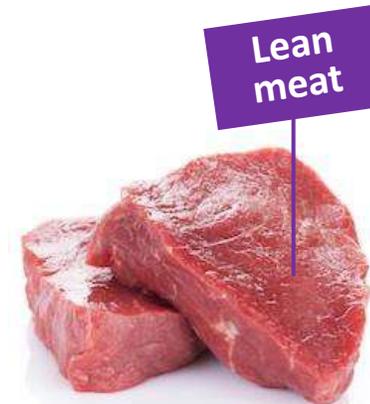
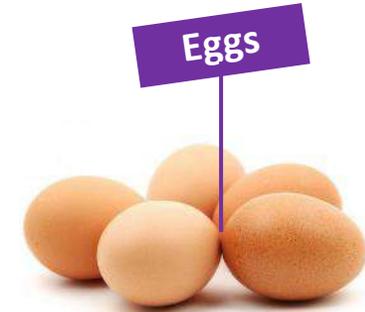
Older customer



Vegetables, salads and fruit are seen to have a significant role in health maintenance

Though potatoes much less so.

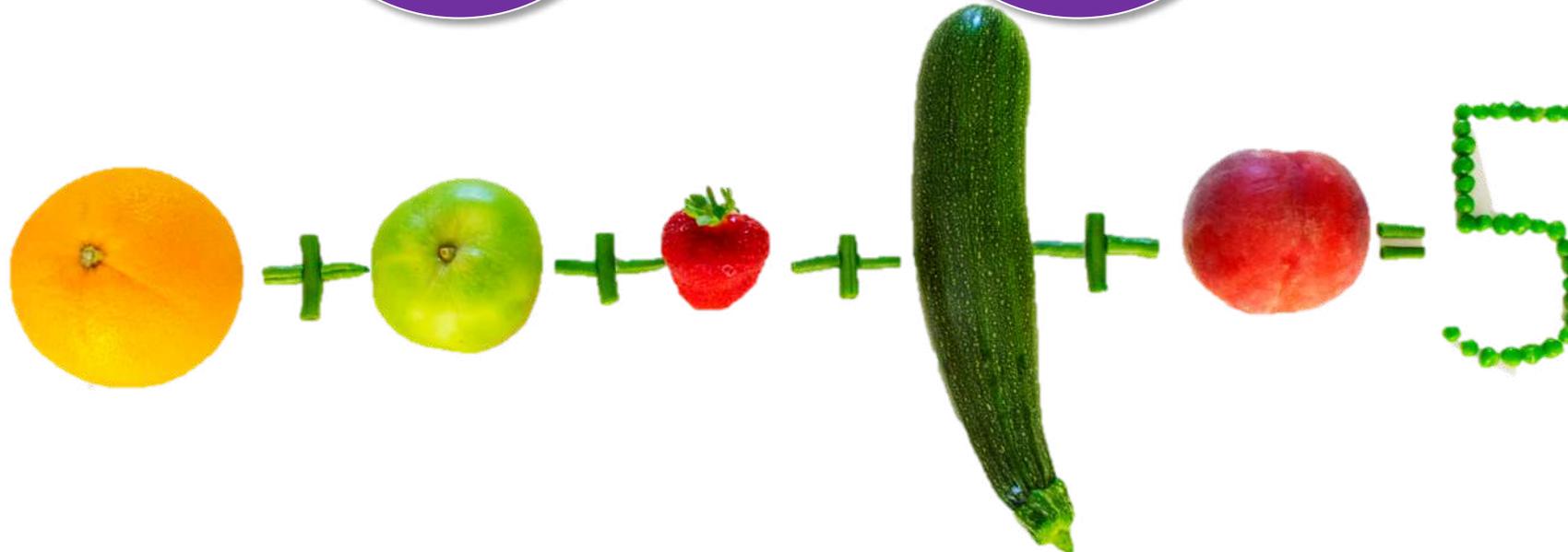
However, recent health trends and health messaging have focused a lot on other foods.



Thus, taking the focus off fruit and veg

The “5 a day” message was very successful at the time and is still strongly embedded

- Not new news, been around for more than 15 years.
- Not as top of mind as it once was.
- Most “aim” for 5 but consider themselves doing well if they hit 3 or 4.
- Little motivation to consume more than 5 a day.
- While some other countries recommend more than 5 a day, that’s viewed via a strongly “othered” lens

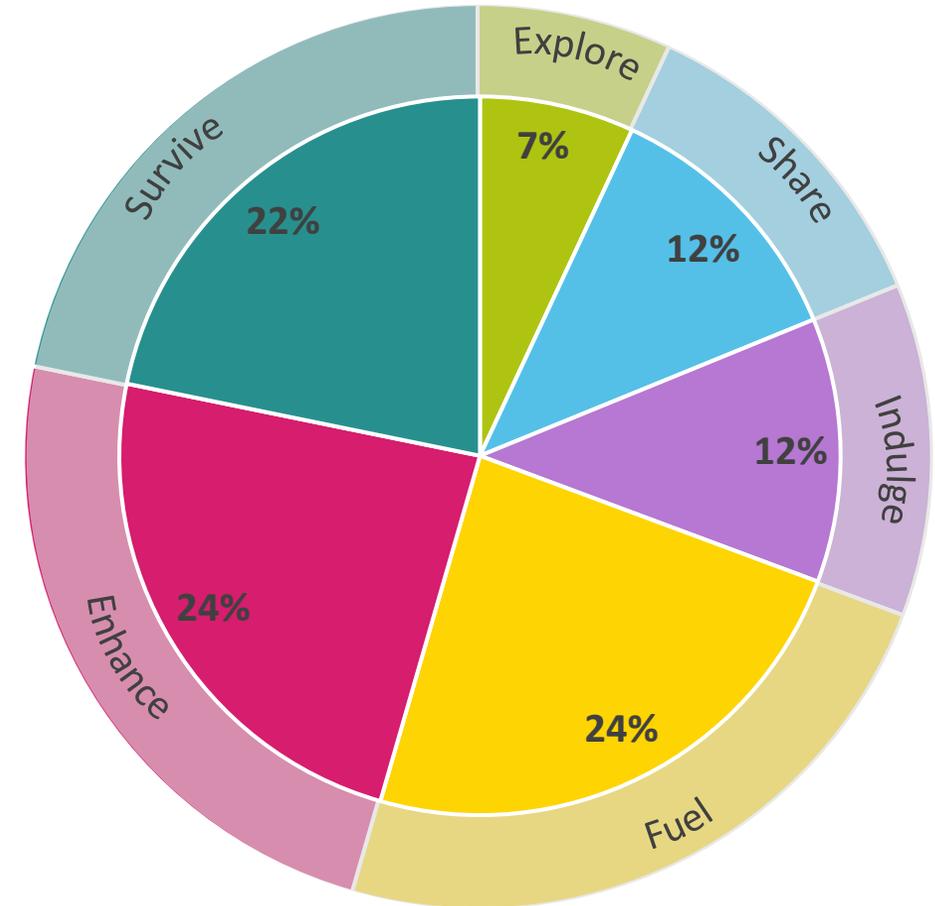


Choice architecture - Need states

Base: All Participants - 1029



	%	Segment
I want to try new foods and drinks that allow me have a new experience	15	Explore
I want to try foods and drinks that makes me look well to others	5	
I choose something so that I could nurture or provide for others	13	Share
I want something that I can enjoy and share along with others	26	
I buy something to comfort me and make me feel good	21	Indulge
For a treat – pure enjoyment	20	
For a snack in-between main meals	34	
I need an energy boost to keep me going	24	Fuel
I wanted to fill me up and sustain me	39	
As a guilt-free option that makes me feel good	21	Enhance
To help me with weight maintenance/control	35	
For bowel/digestive health	36	
For dental health	10	
For heart health/cholesterol control	35	
I just want the basic nutrition my body needs	48	Survive
Simply to satisfy my hunger pangs	26	



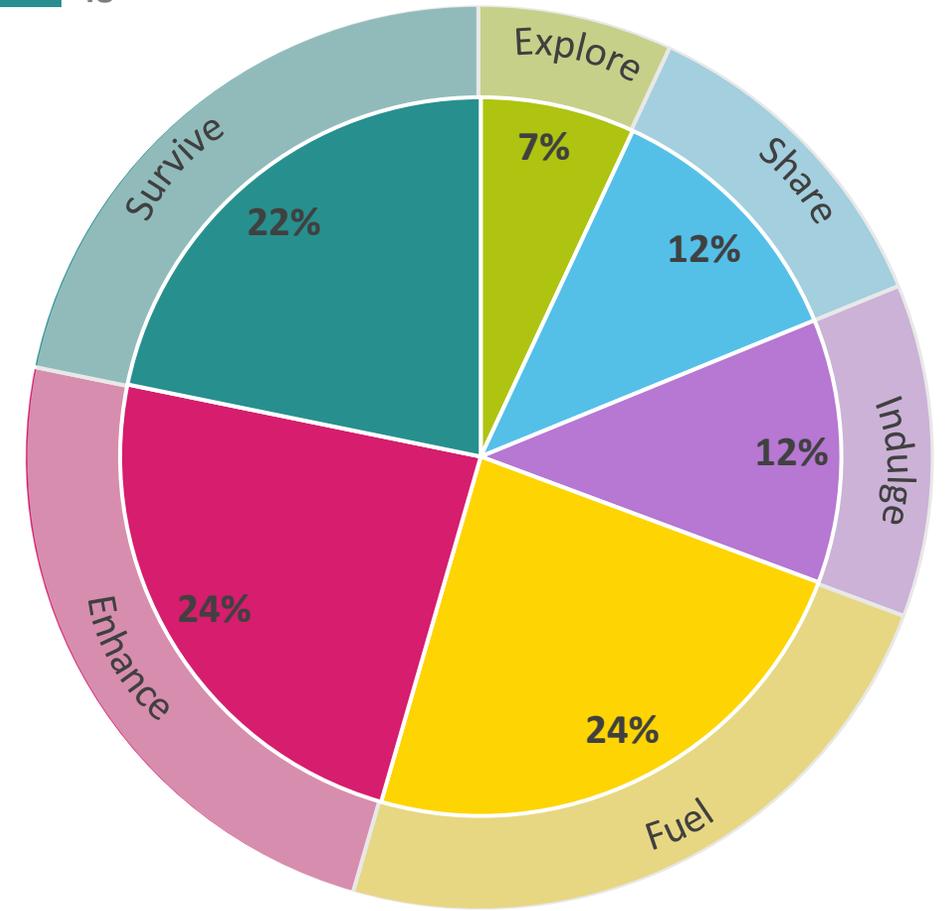
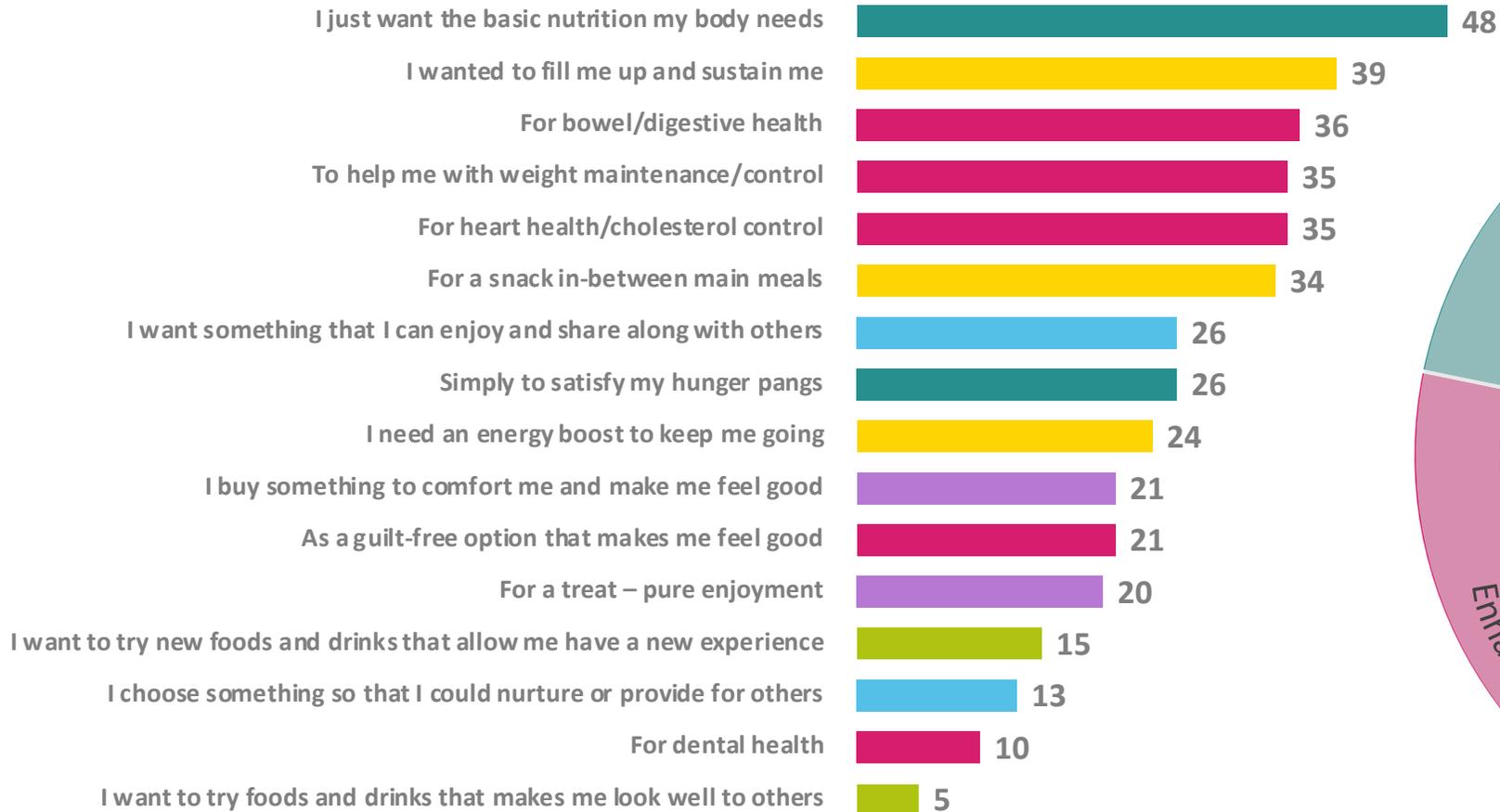
The key fresh food Needstates are Fuel, Enhance and Survive.



Q.12 Which of the following are typically important to you when it comes to choosing the specific types of fresh fruit, veg, salads and potatoes to eat?

Choice architecture - Need states

Base: All Participants - 1029

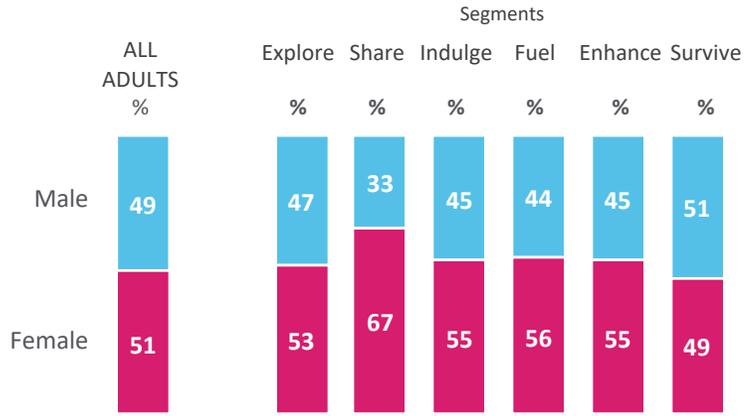


Q.12 Which of the following are typically important to you when it comes to choosing the specific types of fresh fruit, veg, salads and potatoes to eat?

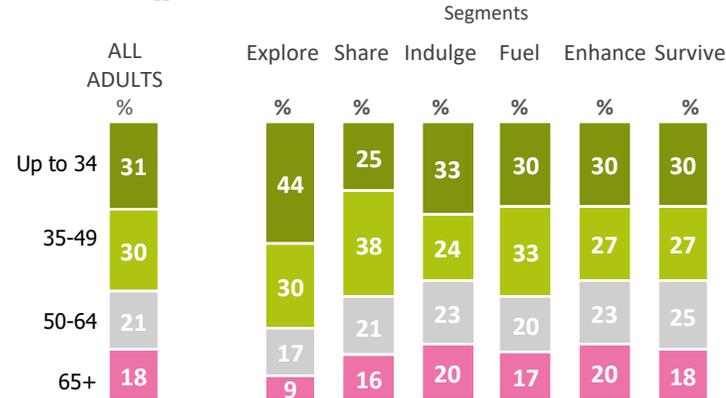
Profile of need states



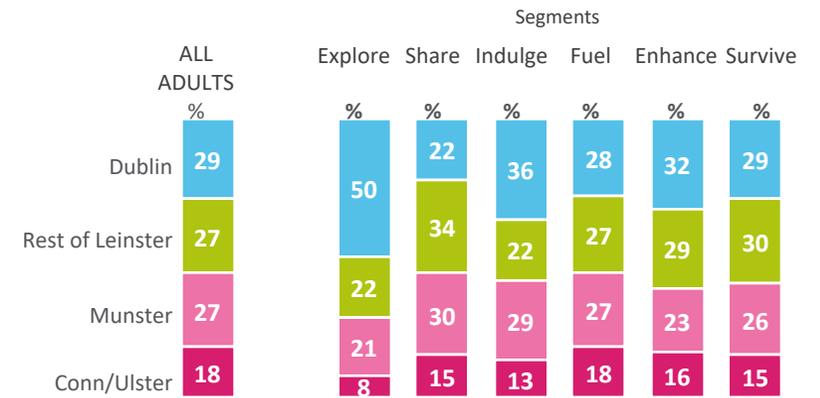
GENDER



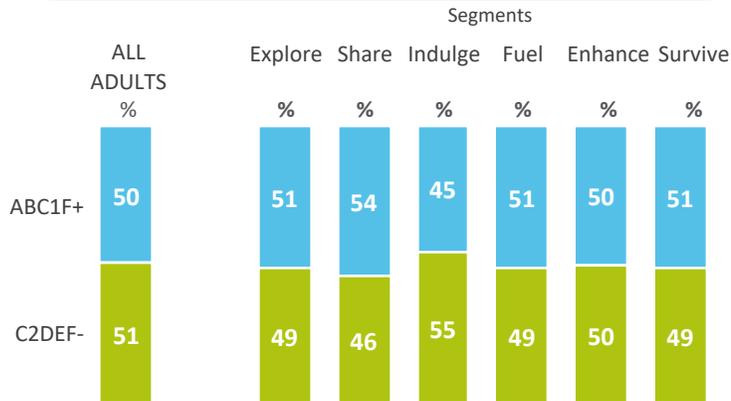
AGE



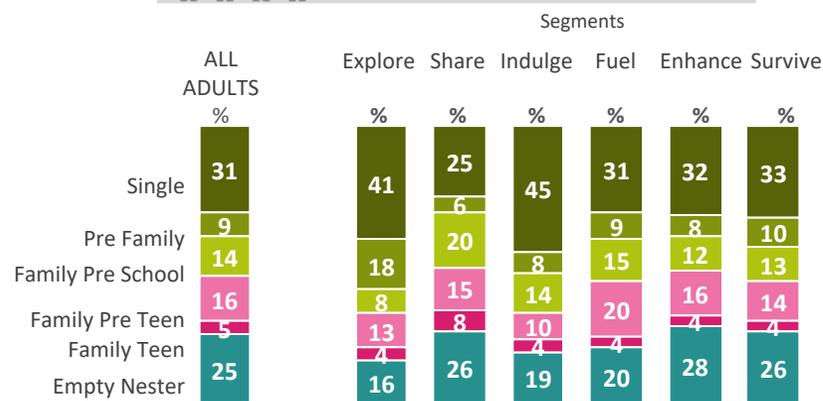
REGION



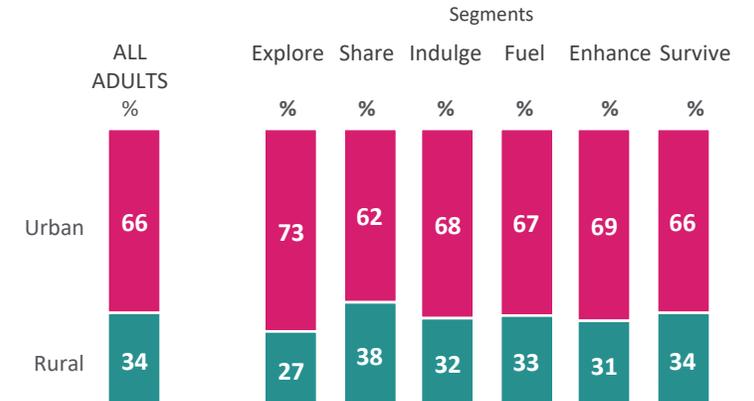
CLASS



Lifestage



AREA



The purchase dynamic

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Thinking
House



The fresh produce purchase dynamic

Base: All Participants - 1029



Q.5a Below is a list of factors people may consider when buying their fresh produce. Please tick all of those which describe your own thinking process when buying fresh fruit, vegetables, potatoes and salads.

The purchase dynamic

The purchase dynamic is quite a habitual one, with many claiming to buy the same produce week-on-week. The specific fresh products purchased are quite strongly influenced by the week's meal plan, and care is taken to manage the amount purchased so as to avoid waste. The single most important in-store decision purchase factor is the appearance of the produce on shelf, with weekly special offers then influencing the choice of specific product to pick up. The perceived Irishness, or Bord Bia quality accreditation of fresh produce are less significant purchase decision factors, with just one in five influenced by recipes they intend to try that week.



The fresh produce purchase dynamic x demographics

Base: All Participants - 1029



	Total	Gender		Age			Lifestage					
		Male	Female	-34	35-54	55+	Single	Pre Family	Family Pre School	Family Pre Teen	Family Teen	Empty Nester
	%	%	%	%	%	%	%	%	%	%	%	%
I choose fruit/veg/salads/potatoes based on freshness of appearance on display	49	44	54	38	47	62	52	48	48	37	54	53
I tend to buy the same fresh fruit, veg, salads & potatoes week in week out	46	44	48	37	46	56	47	46	40	47	48	48
I tend to manage the amount of fresh fruit, veg, salads and potatoes I buy to avoid waste	46	40	52	36	40	64	54	46	41	30	59	48
I choose based on the meals I plan on making for the week	36	32	40	38	36	35	36	46	39	33	65	28
I choose by seeing what the weekly special offers/promotions have on offer	35	31	39	31	38	36	34	38	36	26	54	37
I always know which items I will buy before I go shopping	33	34	32	20	35	44	27	30	35	31	51	38
I choose the type/variety that I think will taste the best	29	31	27	30	29	28	25	28	39	25	35	29
I choose by comparing the prices of different types/varieties on display	27	32	23	32	25	25	32	24	36	19	25	23
I tend to choose the fruit/veg/salads/potatoes that are currently in season	26	22	30	15	18	47	25	18	19	15	27	43
I choose by looking at the display to see what types/varieties are available	24	22	27	20	24	29	20	26	27	16	17	34
I base it on the volume/ number of portions I require	24	29	19	20	25	26	20	37	22	21	33	25
I tend to choose an Irish brand and/or family name on pack	23	26	19	11	19	38	23	14	8	28	27	30
I tend to select the most locally produced fresh produce in order to reduce the environmental impact	22	20	24	16	15	37	29	10	11	22	18	26
I choose based on whether the produce is Irish (if it is a crop that can be grown here)	21	19	22	16	19	27	19	23	9	20	31	26
I choose based on the recipes I am going to try that week	19	21	18	21	25	12	18	34	15	27	17	15
I normally choose bagged produce (fruit/veg/salads/potatoes in bags or packs) over loose	18	16	19	8	20	25	12	11	12	25	24	25
I tend to select organic when available	17	15	20	19	10	24	18	23	16	8	12	22
I choose based on if the Bord Bia Quality Mark is on pack	13	13	14	11	6	25	23	3	6	13	15	10
I choose pre-chopped/sliced fresh fruit, vegetables, salads and potatoes for convenience where available	3	1	4	4	3	2	3	7	2	5	2	1



Q.5a Below is a list of factors people may consider when buying their fresh produce. Please tick all of those which describe your own thinking process when buying fresh fruit, vegetables, potatoes and salads



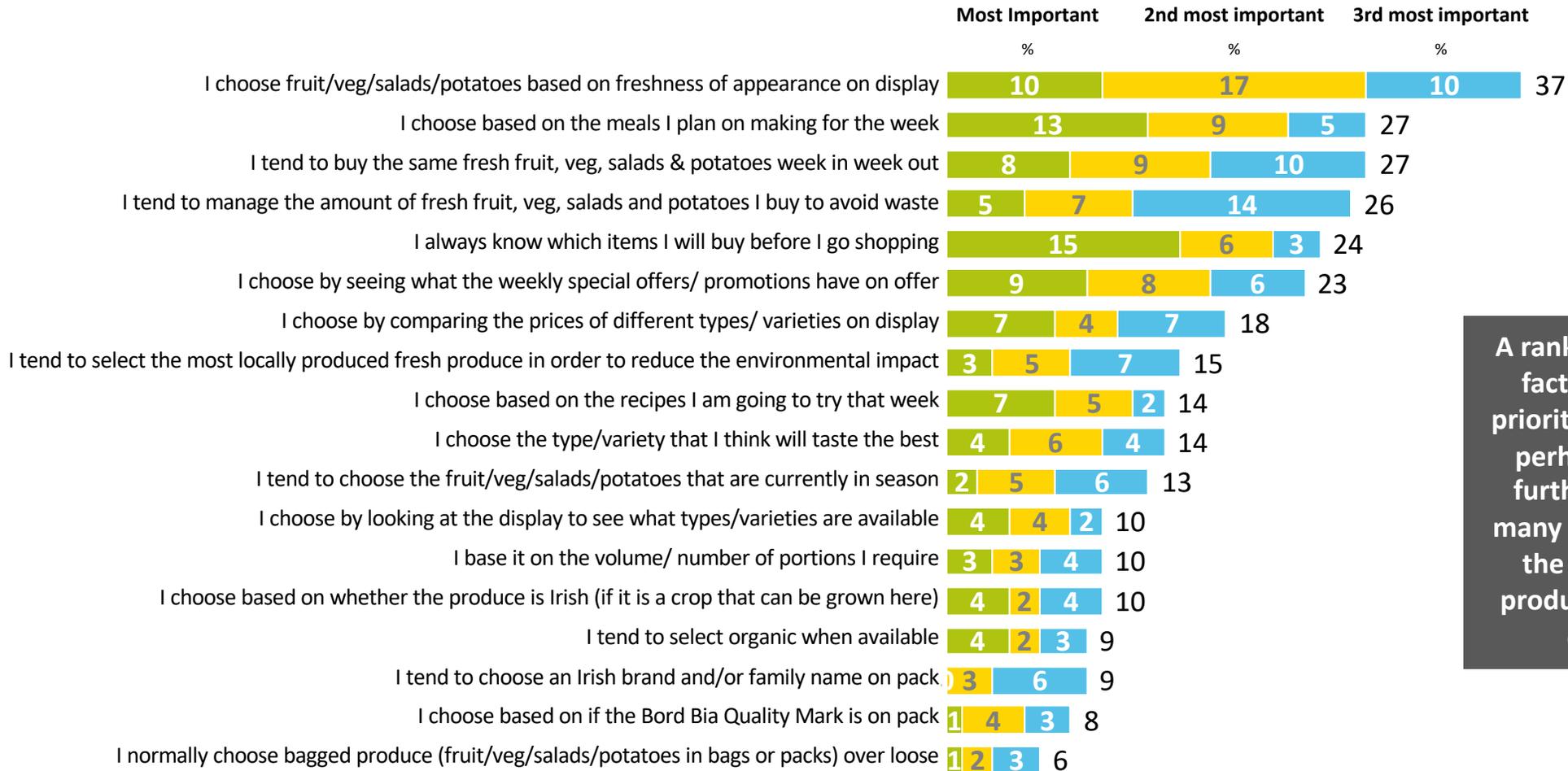
The fresh produce purchase dynamic x demographics

Older shoppers (i.e. those aged 55 years+) are more inclined to base their fresh produce purchase decisions on freshness of appearance and seasonality, and are also more inclined to take local and national product provenance into account. Those in larger households with older/teenage children are more heavily influenced by the week's meal plan, and are also more sensitive to weekly special offers and promotions.



The fresh produce purchase journey x importance

Base: All Participants - 1029



A ranking of purchase decision factors confirms the same priorities as already identified, perhaps accentuating even further the extent to which many have already decided on the specific fresh produce products to purchase prior to entering the store.

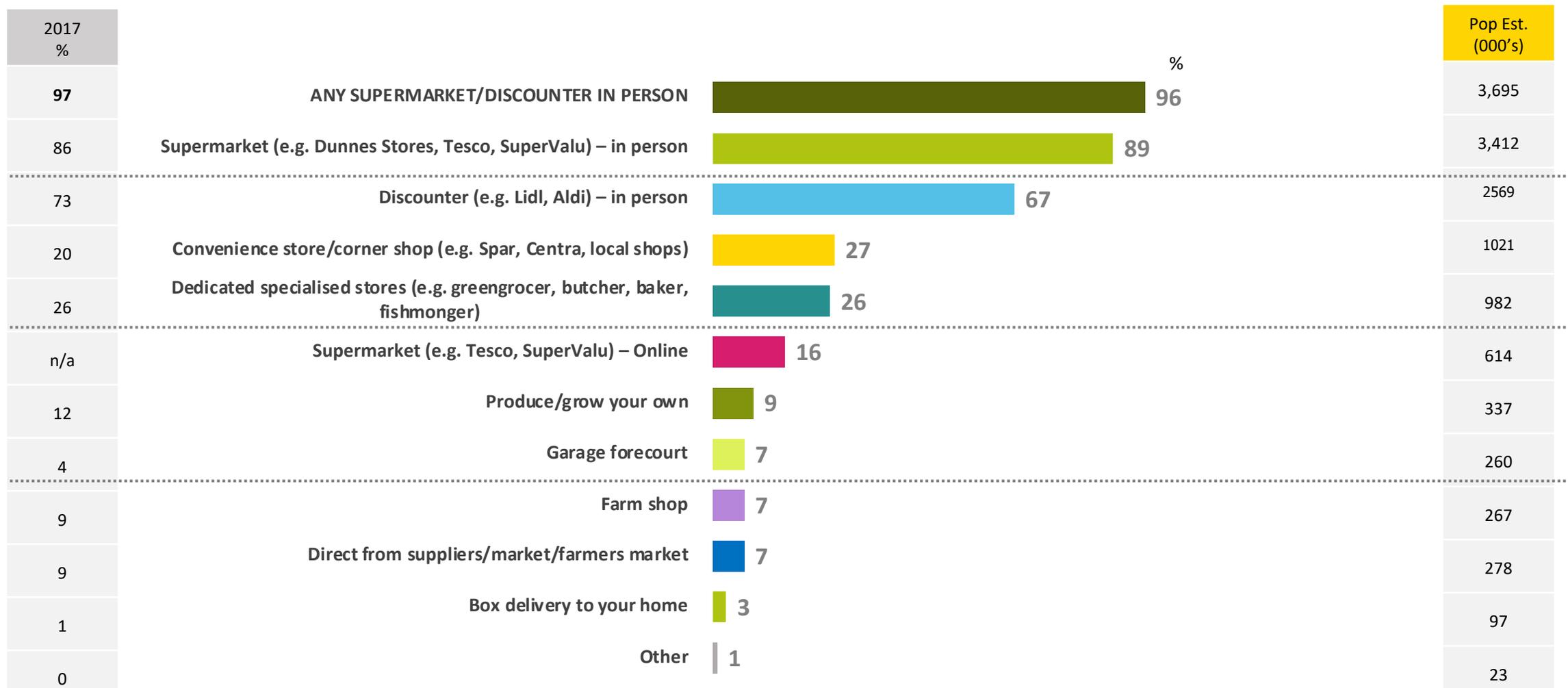


Q.5a Below is a list of factors people may consider when buying their fresh produce. Please tick all of those which describe your own thinking process when buying fresh fruit, vegetables, potatoes and salads
 Q.5b And can you rank the top three factors that guide you most? ...



Outlets *ever used* for purchasing fresh produce

Base: All Participants - 1029



As would be expected, in person supermarket and discounter shopping accounts for the vast bulk of fresh produce purchased. A quarter of all adults do however, purchase fresh produce at dedicated specialised stores and local/convenience stores.



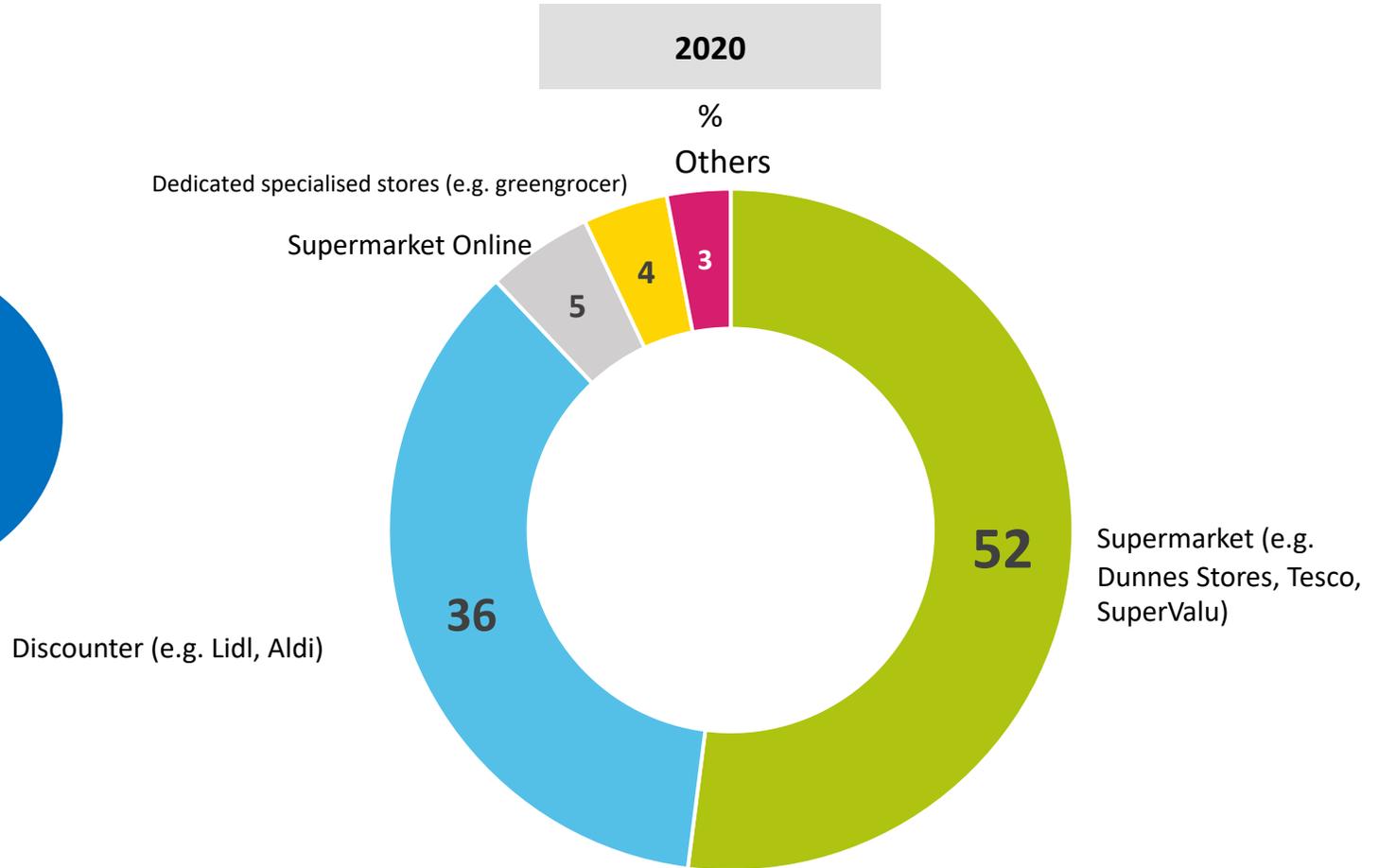
Q.4a In which of the following store types do you ever buy fresh produce? By fresh produce we mean fresh fruit, vegetables and salads – for completeness we will also include fresh potatoes

Discounters account for 36% of fresh produce purchases vs Supermarket 52%

Base: All Participants - 1029



Any supermarket /discounter (in person) **88%**



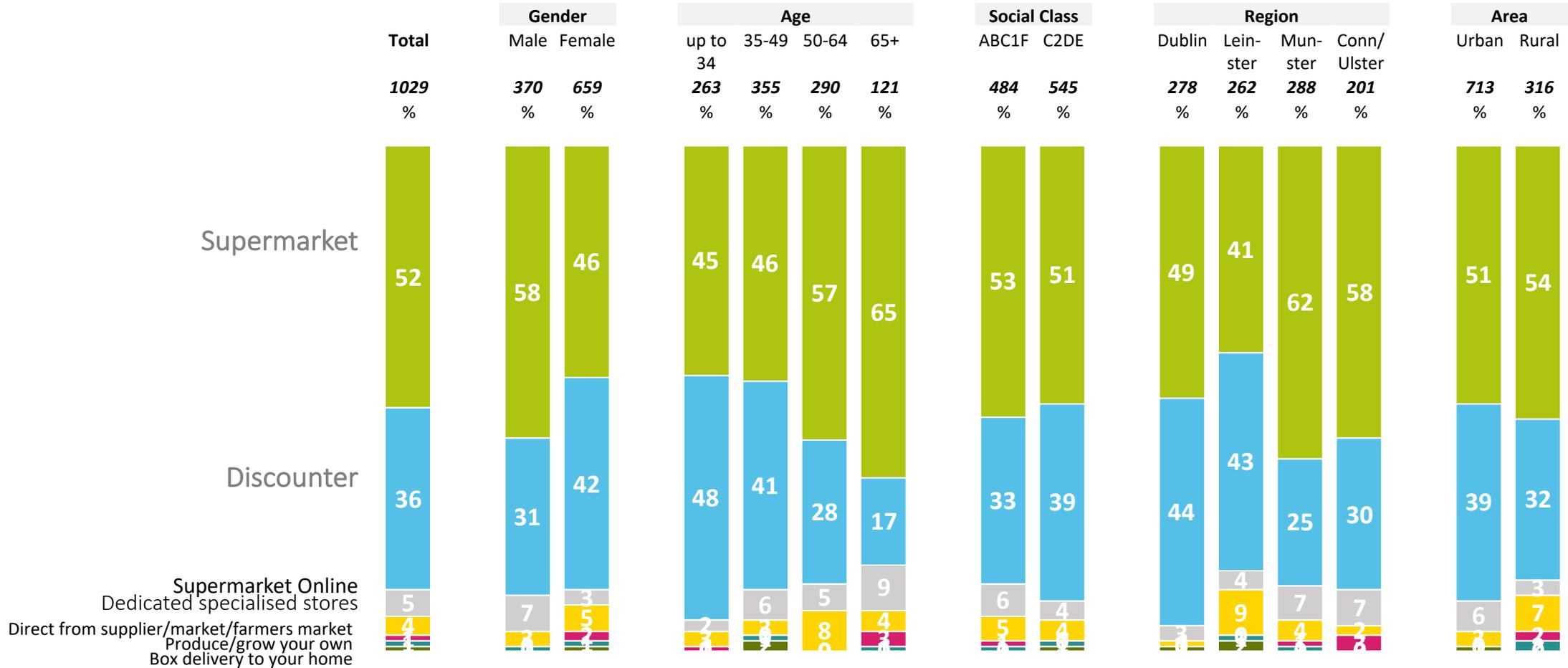
Note despite the Covid-19 lockdown, online still accounts for just 5% of all fresh produce purchased.

Q.4b And in which store do you buy the most fresh produce? Again, by fresh produce we mean fresh fruit, vegetables and salads – for completeness we will also include fresh potatoes.

Outlets *used most* to purchase fresh food produce by demographics



Base: All Participants - 1029



The use of discounters for fresh produce is particularly acute amongst younger female shoppers in the Greater Dublin Area. Supermarket online shopping for fresh produce peaks amongst the over 65s.

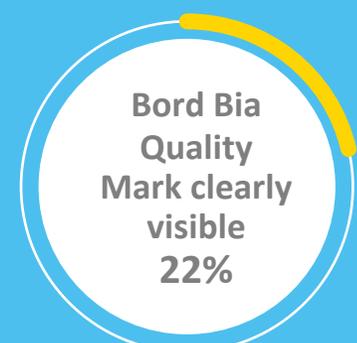


Q.4b And in which store do you buy the **most** fresh produce? Again, by fresh produce we mean fresh fruit, vegetables and salads – for completeness we will also include fresh potatoes.



Drivers to purchase more fresh food produce

Base: All Participants - 1029



Shopping for these categories is quite engaging

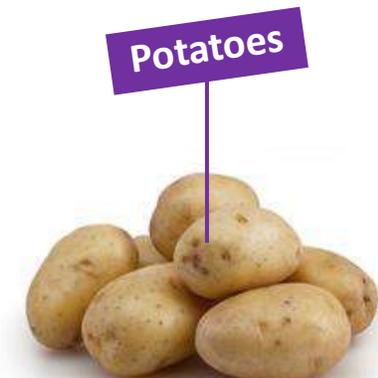
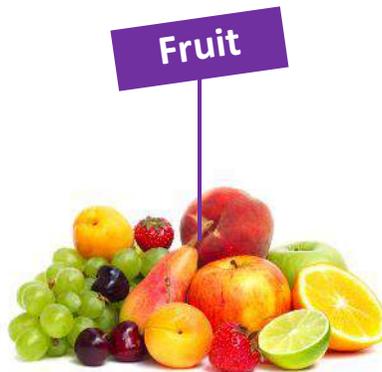
Clear hierarchy in terms of shopping experience.

Most Engaging

Most Functional

Colourful
Vibrant
Sensational
Visual
Active

Although, the current conditions are undermining this somewhat – less opportunity to linger and sensorially interact with produce.



Very little going on in terms of POS, interesting comms & marketing activity compared to other aspects of the shopping experience

Offers that do stand out are:

2 for €5/5.50 on fruit

A motivating approach, which consumers report encourages them buy in greater volume.

Super Six offers in Lidl/Aldi

Works to drive more consumption of fruit & veg already in the repertoire, but rarely prompts people to pick up something new (fear of waste, not knowing what to do with it).



The Covid-19 crisis has changed shopping practices in fresh produce in a number of ways...



Buying less food that goes off quickly (bagged salads, berries) in favour of longer lasting options.

Some are being more adventurous in buying new things during lockdown, with greater headspace to try new recipes.

Some shifts towards buying more frozen/tinned and less fresh produce during this time period

Buying more and in larger quantities (bigger bags of potatoes for example).

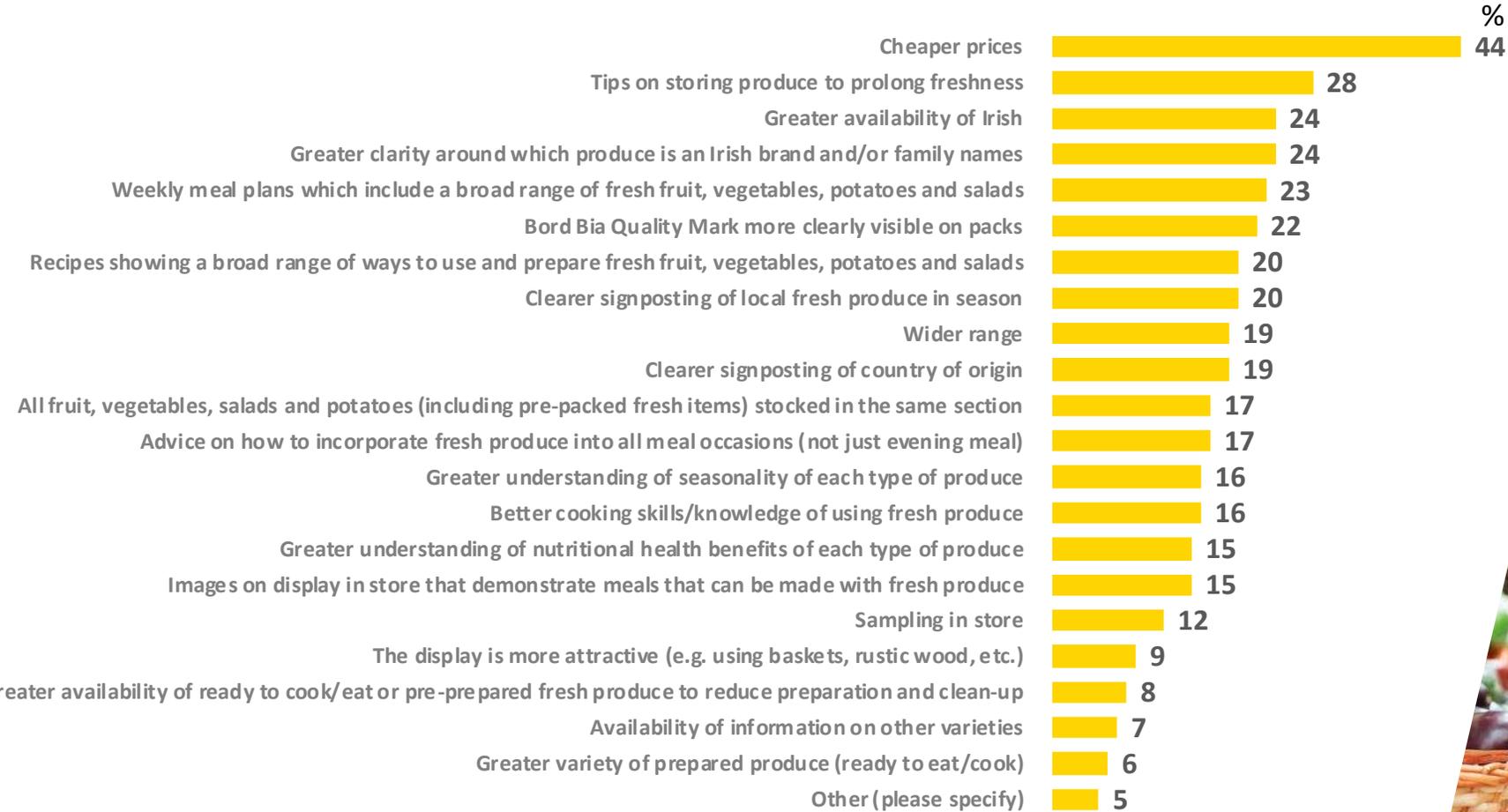
Slightly more buying locally grown produce.

Some are buying more packaged produce rather than loose.

And some of these behaviours will be here to stay, in the medium term at least

Drivers to purchase more fresh food produce

Base: All Participants - 1029



Q.6 Which of the following would encourage you to buy and consume a higher volume of fruit, vegetables, potatoes and salads?



Drivers to purchase more fresh food produce

In addition to cheaper prices and storage tips to prolong freshness, a significant proportion of adults suggest that a clearer labelling/branding of fresh produce as Irish, along with guidance on weekly meal plans, would all encourage them to purchase more fresh products.

Other potential triggers to increased fresh food purchase include information on recipes/ways to use and prepare fresh food products, and clearer signposting of local fresh produce in season.

Deep dive on vegetables

BORD BIA 
Thinking
House



Everyone knows vegetables are good for them and that they should be eating more

Interestingly, respondents tasked with eating more vegetables in the research found it very easy – if a bit dull – to do this.

Veg was also the category where we detected most overclaim (comparing quant data with observable qualitative data).



So what's stopping us?

The vegetable category is multi-faceted

Long standing, everyday staples

Onions, carrots, celery, cabbage, peas.

Bedrocks of Irish cooking. Used very frequently, across a range of dishes, day to day. Important for both traditional & more modern dishes. Cooked via a range of methods and in a variety of dishes.

Traditional, but more occasional, options

Cauliflower, turnips, parsnips, leeks.

Key elements of traditional Irish cooking, but less of a staple in households. Some are associated with weekend dishes (often accompanying a roast) cauliflower cheese, gratins, roast).

Contemporary, versatile stars

Peppers, broccoli, sugar snaps, sweetcorn, courgettes, spinach, sweet potato, green beans, mushrooms.

Veg that lend themselves to more modern ways of cooking. Often very versatile, used in a wide variety of dishes and cuisines.

For the more confident cook

Aubergines, asparagus, butternut squash, broad beans.

A little more intimidating for the average cook, though still utilised fairly regularly by some.

Seasonal/salad options

Tomatoes, cucumbers, radishes, spring onions.

Associated most specifically with this kind of eating, though some are more versatile (tomatoes).

Unknown and intimidating

Celeriac, artichokes, okra, swiss chard.

Seen in recipes and occasionally in the supermarket, but not sure how to handle. We'd like to try, but not sure where to start.

There are a number of **barriers** to including more vegetables in our diets that we need to consider



Entrenched habits

- Consumers often fall into habitual eating.
- For example, consume 1 veg at lunch, 1/2 at dinner, then making up the rest of their 5 a day with fruit.
- Little incentive to break out of this pattern.



Lacking wow factor

- Compared to other food groups, can be difficult to get excited about veg.
- Difficult to 'wow' with vegetables.
- Don't engage like steaks/burgers/ fish.
- We can be very dull in our cooking techniques here too.
- We need to work **hard** to make veg delicious and a lot of the time we don't try very hard.



Stuck in an accompaniment role

- Often seen as a 'side' to the more exciting 'main focus' (meat/fish/pulses/ carbs).
- Or a supporting player in curries, stir-fries, pasta sauces, stews.



Health benefits lack specificity and tangibility

- Everyone knows veg is 'healthy'.
- But the specific health benefits of individual veg often are not top of mind.
- The impact made day to day (e.g. broccoli, high in zinc, great for nails) is not strongly communicated.



Don't hear a lot about them

- Less noise compared to other food groups.
- "Broccoli doesn't dance on TV".
- No major brands in this space, little communication from food bodies.



Barriers to embracing new options

- Lack of knowledge and confidence around less familiar veg types (celeriac, artichokes, asparagus).
- Reluctant to take the plunge, even if featured and on offer (Super Six).



Preparation can be tedious

- Chopping and prepping veg can be irritating, time consuming and off putting (onions, squash, turnip, broad beans).
- And while pre-prepared formats exist, they can feel like poor VFM and like 'cheating'.

The following **triggers** are seen to drive more vegetable consumption among consumers



Actively turning away from meat

- For sustainability, health or animal cruelty reasons.
- Increased veg consumption tends to fill this gap.



Engaging with particular cuisines

- That makes the most of veg's vibrancy/colour/flavour.
- Thai, Mexican, Indian, Chinese.
- Requires confidence, strong cooking abilities.



Experimenting with different cooking styles

- Roasting, sautéing and stir-frying all drive veg appreciation as they intensify flavour and maintain texture/nutrients.
- Cooking with specific spices and herbs can also drive taste credentials.



Embracing raw

- Cultivating a love of raw vegetables opens up new opportunities in the snacking space.
- Good way to get children more engaged with veg.



Appreciation of what they add

- Growing numbers really appreciate the flavours, colours and texture that vegetables add.
- A meal without veg feels 'wrong' and is much less satisfying from a taste and aesthetics POV.
- It's generally possible to incorporate more veg, often hidden.

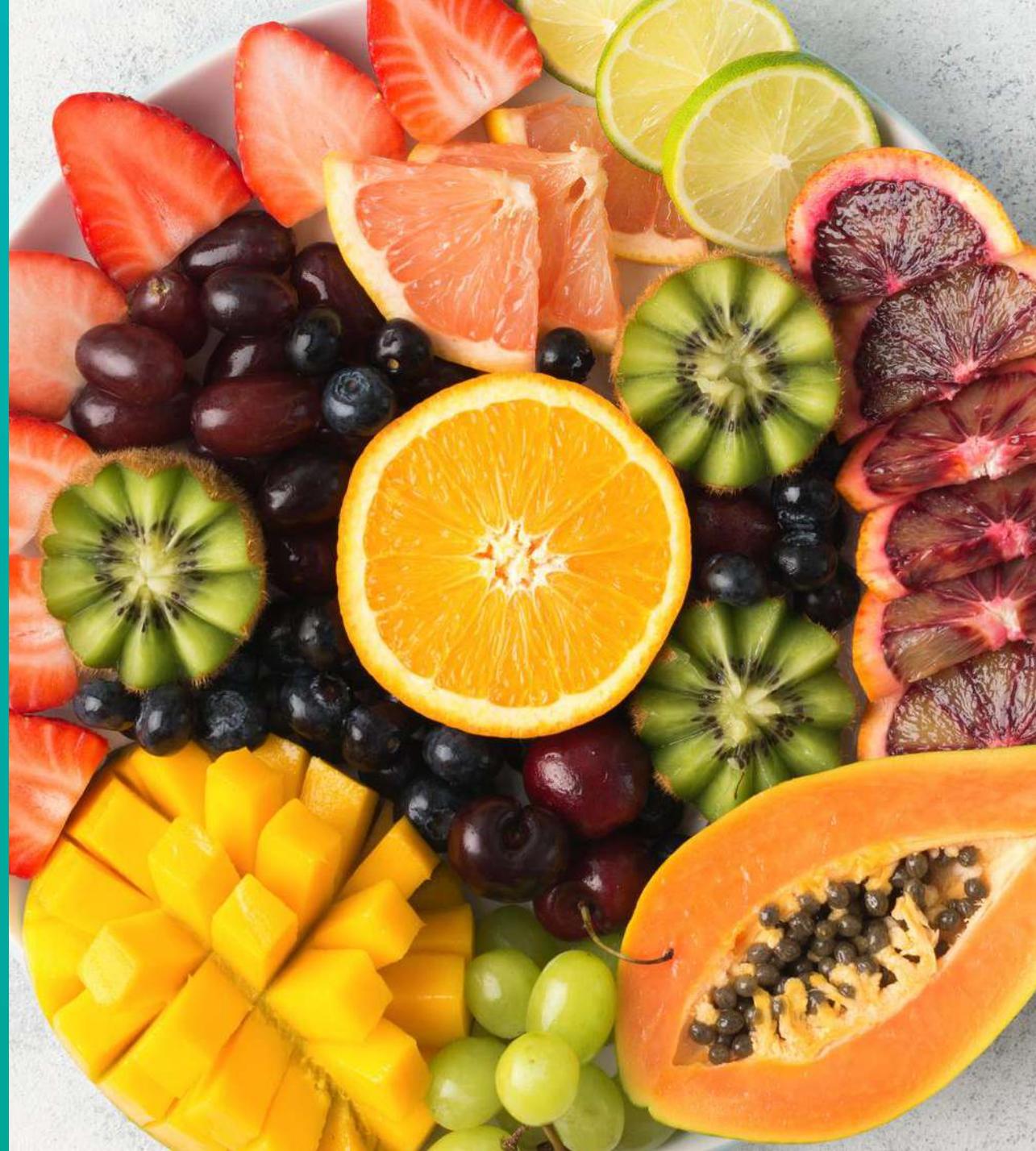
Biggest opportunities for vegetables involves expanding their role outside of the dinner occasion



	Current state of play	Opportunity areas
Breakfast	<ul style="list-style-type: none"> • Very little representation here currently. • Occasional use at weekend breakfasts (breakfast fry/avo toast/egg dishes). 	<ul style="list-style-type: none"> • Drive the weekend breakfast occasion in particular. • Beyond the fry into lighter options. • <i>Tomatoes, mushrooms, spinach, asparagus, avocado, peppers.</i>
Lunch	<ul style="list-style-type: none"> • Vegetables do play a role here, but offer in very small quantities (sandwich, side salad). 	<ul style="list-style-type: none"> • Drive their presence in bigger roles, which may also involve promoting other lunch options. • <i>Soup, baked sweet potato, & spinach, broccoli and peas in things like omlette/frittata.</i>
Snacks	<ul style="list-style-type: none"> • Limited role for most, but some raw veg snacks. 	<ul style="list-style-type: none"> • Big opportunities here for healthy snacking options, paired with interesting dips/sauces. • <i>Carrots, celery, peppers, radishes, cucumbers.</i>
Dinner	<ul style="list-style-type: none"> • Veg already plays strongly here, mostly as accompaniments. 	<ul style="list-style-type: none"> • Opportunities are in elevating veg to 'star status' in the meal. • Supported by new recipes, cooking techniques and cuisines. • <i>Cauliflower, courgettes, peppers, aubergine, mushroom, asparagus, butternut squash.</i>

Deep dive on fruit

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House



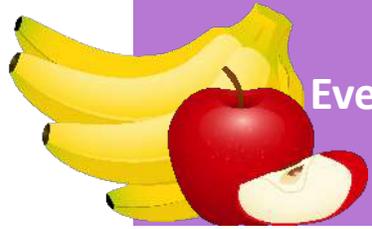
Fruit is seen as an important and enjoyable component of Irish diets

Health benefits of fruit are well known but hampered by the concern that sugar in fruit cancels out nutrients or means it would be better to get them elsewhere.

Veg is widely understood to be the 'better' source of one's five a day and where the focus should be (even if this isn't how it plays out in reality).



Clear demarcation between different sub 'categories' of fruit



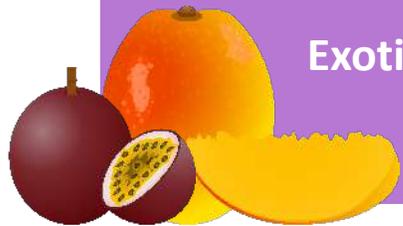
Everyday fruit

- **Apples, oranges, bananas, pears, plums.**
- Great snacking options, convenient, handy, can be eaten 'as is'.
- Good understanding of the specific health benefits of this subcategory.
- Cost effective and always on the shopping list.



Berries and similar

- **Strawberries, blueberries, raspberries, blackberries, grapes.**
- Play strongly at breakfast in particular, as well as more general snacking.
- Expensive. Though often specifically budgeted for.
- Health benefits are strong. Blueberries known to have superfood status
- More 'treaty' than everyday fruit.
- Aspirational, featured heavily on IG.



Exotic fruit

- **Pineapple, melon, watermelon, mango, kiwis, peaches**
- More occasional, dessert focused. Some snacking, but not widespread
- Takes significant preparation (pre-prepared options are popular).
- Health benefits much hazier, all the focus on taste.
- Provide center pieces for desserts (and tables!)

Barriers to more fruit consumption have a lot to do with sugar content



Sugar worries

- While fruit is known to have 'natural sugars, it's not necessarily clear how much better these are than common or garden sugar cane.
- Consumers wonder if they'd be better getting the vitamins/minerals from elsewhere.



Lacking sustenance

- Compared to other snacks, fruit is seen as delivering a quick sugar rush, lacking slow release energy.
- So while the fruit is low in calories, it may not be as healthy or functional as other snacks which release energy slower and deliver more sustenance (like wholegrains, nuts, nut butters, etc.).



Expense

- Berries and exotic options are costly and can spoil quickly.
- Real fear of wasting fruit which is both a poor use of money and seen as disrespectful to the farmer who grows them - to be avoided.



Not indulgent enough

- While simple fruit desserts are perfect for 'everyday' there's often push back, against fruit as an indulgent option, competing with chocolate desserts, cheesecake, pastries, etc.
- Pairing fruit with chocolate, ice cream or cream is a way of competing, but can be seen to be counter-productive, undermining health credentials entirely.



Unfamiliarity

- There are exotic, unknown types of fruit that are avoided by consumers because they don't know how to deal with them.
- Star fruit, Sharon fruit, ugly fruit, pomegranates.

Drivers to more fruit consumption are associated with taste and low cal credentials



Satisfying sweet cravings

Well understood health benefits

Low in calories

Easy sell to kids

Aspirational on trend

Convenience

- Fruit is much better choice when sweet cravings hit than opting for the likes of chocolate, biscuits or cake.

- Particularly the more regularly consumed fruits.
- Oranges and vitamin C, blueberries 'super food' status, pears high in fibre.

- Very little calories for the 'treat' that they deliver.
- Physically 'feel' light in the stomach, psychologically supporting the perception of them as low cal.

- Often very popular with kids (more so than veg).
- Makes parents feel good to feed their children more fruit.

- Berries are the treat of choice for various influencers and are all over Instagram.

- Perfectly packaged, easily transportable, requiring no preparation.

Opportunities for fruit lie within breakfast, snack and dessert occasions



	Current state of play	Opportunity areas
Breakfast	<ul style="list-style-type: none"> Play an important role here already for some. 	<ul style="list-style-type: none"> To make consumption of at least '1' piece of fruit at breakfast the norm. Shifting fruit from an 'accompaniment' role to centre stage of the meal. Berries, bananas, apples, pears, plums, oranges.
Lunch/Dinner	<ul style="list-style-type: none"> Fruit doesn't play strongly in the main lunch/dinner occasion. 	<ul style="list-style-type: none"> Opportunities here aren't very significant
Snacks	<ul style="list-style-type: none"> Fruit already delivers well as a light snacking option. 	<ul style="list-style-type: none"> Opportunity lies in positioning it as a more sustaining/substantial option. Would need to be paired with other foodstuffs to fulfil this role – nuts, seeds, cheese, butters. Simple recipes for inspiration would be useful. Apples, bananas, grapes, pears, oranges,
Dessert	<ul style="list-style-type: none"> Works as an 'everyday' dessert but struggles to compete in a more indulgent space. 	<ul style="list-style-type: none"> Opportunity lies in inspiring people with indulgent fruit options and highlighting fruit's taste and benefits here. Pineapple, melon, kiwi, mango, apples, pears, bananas.

Deep dive on bagged salad

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Bagged salads are a component of Irish diets

But usually play a relatively niche role, associated with light meals or accompaniments.



It's a category that consumers find difficult to clearly segment in their minds



There are obvious differences between..

- Variants that are mostly eaten raw (rocket/iceberg/butterhead).
- Those that can also be cooked (kale/spinach) and that are therefore more versatile.



Prepared salad category has exploded

- Beyond leaves.
- Into couscous, pasta, quinoa.
- Leaving 'leaves' in the shade somewhat.

Barriers to eating more bagged salads lie with their niche role and concerns about shelf life



Nutritional credentials aren't seen as very strong

- While bagged salads are low in calories, their active health benefits aren't well known or appreciated (except spinach/kale).



Relegated to light meals/accompaniments

- Little tradition in this country of eating substantial salads at dinner with proteins, nuts, grains or dairy.
- Thus salad opportunities beyond lunchtime are limited.



Shelf life is short

- Goes off quickly, therefore raises concerns about waste.
- A problem currently with shopping happening only once a week.



Concerns about chemicals

- Feeling that bagged salads are full of chemicals like chlorine to keep them fresh.



Popular leaves can be bland tasting

- Irish consumers have historically eaten quite bland leaves like iceberg/butterhead lettuce.
- There may be opportunities with more interesting greens.



Dressings can undermine health halo

- There are concerns that dressings for bagged salads, particularly commercially available ones, aren't very healthy.
- Making your own, healthier dressing is an opportunity area.

Triggers to eating more bagged salad are predominately health focused



They're a replacement for unhealthy options

- Salads are often the 'good' choice compared to chips, potatoes, bread, particularly with meals like burgers, pizzas, lasagne.
- Have a health halo.



The basis for a quick healthy meal

- Particularly at lunch.
- It doesn't take much preparation to open a bag and throw in some additional ingredients.



Options that can be cooked are very versatile

- Spinach/kale for example.
- Can be put to great use in soups, pasta, stir fries, curries or egg dishes.



Good for low calorie snacking

- A niche behaviour, but a bag of salad leaves can be a great option for those who like to snack constantly but are looking for healthy options.

The opportunities for salad lie predominantly in delivering further to the dinner occasion, and with versatile products like spinach



	Current state of play	Opportunity areas
Breakfast	<ul style="list-style-type: none"> • Bagged salads don't play strongly here. 	<ul style="list-style-type: none"> • Some limited scope for versatile, 'cooked' options like spinach, but this is niche.
Lunch	<ul style="list-style-type: none"> • This is where salads currently have the strongest presence 	<ul style="list-style-type: none"> • There is certainly scope to keep pushing its role here. Promotion of healthy, tasty dressings may be helpful.
Snacks	<ul style="list-style-type: none"> • Very little delivery in this space. 	<ul style="list-style-type: none"> • May be some opportunities here for snacking coming straight "from the bag".
Dinner	<ul style="list-style-type: none"> • Not playing a large role here, except as an accompaniment. 	<ul style="list-style-type: none"> • There is an opportunity here to promote the eating of more substantial salads (like they do in other countries).

Deep dive on potatoes and potato products

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Potatoes are obviously a staple in Irish diets

Fresh potatoes and fresh/frozen potato products are seen in very different terms.

Prepared potato products are firmly associated with unhealthy, old fashioned, convenience – which isn't always justified, but firmly entrenched.



Barriers to eating more potatoes are driven by health perceptions



Health credentials aren't seen to be strong

- Potatoes are viewed as 'carbs' in line with bread and pasta rather than having the nutritional benefits of other vegetables (which isn't accurate, but how it's perceived).



And this is compounded by other factors

- Potatoes are often cooked in fat, exacerbating health concerns.
- Feels 'heavy' on the stomach.
- Frozen/chilled products are even more maligned from a health point of view.



Potatoes are well represented in our diets

- Feeling that Irish people eat lots of potatoes as it stands.
- Some push back to the suggestion that we should be eating more. Why?



Associated with 'meat and two veg' type of cooking

- Not that there's anything wrong with that.
- But many of the more adventurous cooks are looking to different styles for inspiration.



Cooking and preparation takes time

- More so than equivalent carb options (pastas, rice, cous cous).
- Some of the frozen/chilled potato products do deliver on convenience however, due to health perceptions, not always considered by consumers.

Triggers to eating more potatoes are to do with their versatility and taste credentials



Versatility

- Potatoes lend themselves to many different styles of preparation – all delicious.
- You could have potatoes every day of the week and not get bored.
- New ways to use them keep presenting themselves.



Confidence in ability to cook

- Irish people are very comfortable with potatoes, pride themselves on their ability to cook them.
- We all think we make the best mash, roasties, chips, etc.
- Irish cooks do feel empowered to experiment with potatoes.



A crowd pleaser

- Everyone likes potatoes, kids will eat them, guaranteed hit.
- They're a failsafe

Vitamins

They are nutritious

- Vit C, Vit B12, potassium.
- This isn't always well understood though.
- Not being considered one of the 'five a day' has left people thinking that they're not nutritionally strong.



Cheap

- There is always a quick, cheap meal to be had from a baked potato.

Biggest opportunities for vegetables involves expanding their role outside of the dinner occasion



	Current state of play	Opportunity areas
Breakfast	<ul style="list-style-type: none"> • Potatoes deliver in a small way here, particularly at weekend breakfasts. 	<ul style="list-style-type: none"> • May be significant opportunities for convenience options here, particularly as an alternative to bread and cereal.
Lunch	<ul style="list-style-type: none"> • Potatoes often avoided at lunch time because it feels like a 'heavy' option. 	<ul style="list-style-type: none"> • May be scope in promoting lighter options with shorter preparation times (soups, salads and baked potatoes).
Snacks	<ul style="list-style-type: none"> • Fresh potatoes don't really play here. 	<ul style="list-style-type: none"> • Opportunities would appear to be limited.
Dinner	<ul style="list-style-type: none"> • Already delivering very strongly here. However, opportunity to widen the types of potato-based food cooked at dinner time. 	<ul style="list-style-type: none"> • Promoting how potatoes can be cooked in a new, healthier way (relying on spices/herbs for flavour rather than salt/fat). • Looking to different cuisines (curries, Italian, Spanish) may also offer opportunities.

Territories for development

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Territory 1:
Vibrant health



Consumer insight:

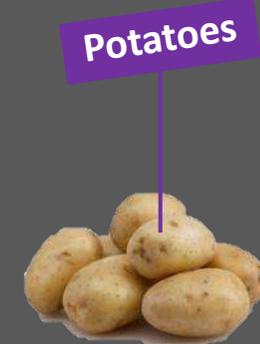
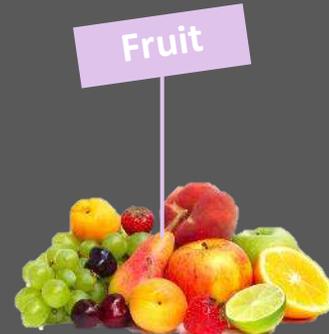
I want to enhance my wellbeing to be the best I can be through the food that I eat



Key message:

Fresh produce is the most “natural” cornerstone of healthy eating

Flexing across categories



Revamp/rethink of ‘5 a day’ message to make it more relevant and compelling.

Education piece on specific health credentials of main fruit & veg options and how that translates to benefits.

Vegetables at the centre of the campaign where the most potent health benefits lie.

Reassurance on fruit’s unique benefits, downplaying the impact of sugar.

Stronger communication of specific benefits of salad.

Focus on hero options (spinach).

Communication of salads as a ‘healthy replacement’ for other options.

Big focus on re-establishing potatoes’ nutrition credentials.

Emphasis on new methods of cooking potatoes that utilise herbs and spices rather than depending on oil, cream or salt.



Territory 2:

Refining Rules



Consumer insight:

I'm stuck in a food rut and I want to change it up



Key message:

New easy delicious and different ways to eat fruit and vegetables at different times of day

Flexing across categories

Veg



Emphasis on both trying new options and shaking up how we consume what we usually buy.

Particular focus on new meal/snacking occasions for fresh produce.

Driving vegetables' roles in breakfast and snacking occasions in particular.

Spotlighting fruits' capacity within snacking and desserts (even lunch/dinner).

Fruit



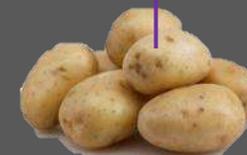
Bagged salads



Highlighting non-traditional, more interesting salad leaves.

Focus on versatility of hero options (spinach/kale) and using them in new occasions.

Potatoes



Demonstrating use of potatoes in other cuisines for new ideas (curries, pasta, Spanish options).

Making potatoes a more regular breakfast food.



Territory 3:
Food of the future



Consumer insight:
I am trying to adapt my eating for a better world



Key message:
Fresh local produce is "better for me" and good for the planet

Flexing across categories

Veg



A focus on more local, seasonal eating to showcase fruit and veg at its finest.

Bringing vegetables to the fore of diets as meat-eating reduces. Presenting fresh vegetables as the obvious food to fill this gap.

Fruit



Highlighting fruit's role as the world's natural treat. A better choice on every level than over-processed, high sugar cakes, puddings and confectionary.

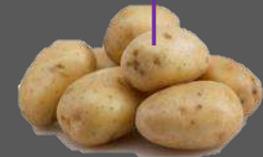
Bagged salads



Focus on local salad options, perhaps even re-cultivating varieties that have become much less popular.

Packaging of bagged salads may be an important area to address if this route is taken.

Potatoes



There would be a very fitting role for potatoes under this territory as a nutritious, satisfying, versatile food that requires zero air miles.



Territory 4:

Confident cooks



Consumer insight:

There is a lot of fruit and veg I have never cooked or know how to cook



Key message:

New easy ways to cook with/use fruit/vegetables to suit your lifestyle

Flexing across categories

Veg



Communication of a greater range of cooking techniques to maximise flavour, texture and nutrients of fruit and veg.

Ambitious expectations for what can be achieved with fruit and veg, using cookery techniques we would normally associate with professional chefs and shows like MasterChef (tempura, flash frying). Focus on high end dessert options for fruit (patisserie, souffles).

Education on handling / preparation of more exotic fruit and veg.

Fruit



Extension of role of salads into more substantial meal options, with confident pairing with meat, grains, fish and dairy.

Focus on home-made dressings and sauces for salads.

Bagged salads



Potatoes



Promotion of more interesting and adventurous potato recipes, taking in different techniques and across different cuisines.



Territory 5:
Sensory stimulation



Consumer insight:
I am looking for exciting new and different food experiences



Key message:
The power of 5..

Flexing across categories

Veg



Fruit



Bagged salads



Potatoes



Communicate the visual and taste potential of fruit and veg.

Focus on non-Irish cuisine for new taste/flavour profiles, cooking with spices/herbs, great flavour pairings within veg/fruit preparation, perhaps extending the role of fruit within savoury dishes.

Highlighting the aesthetic impact salads make on a meal. The instagrammable, feelgood nature of them.

Mixing up the flavour credentials of potatoes by matching them with new sensorials.

Thank You.

