



Fresh Produce Review

Data from FreshLook Marketing/Information Resources

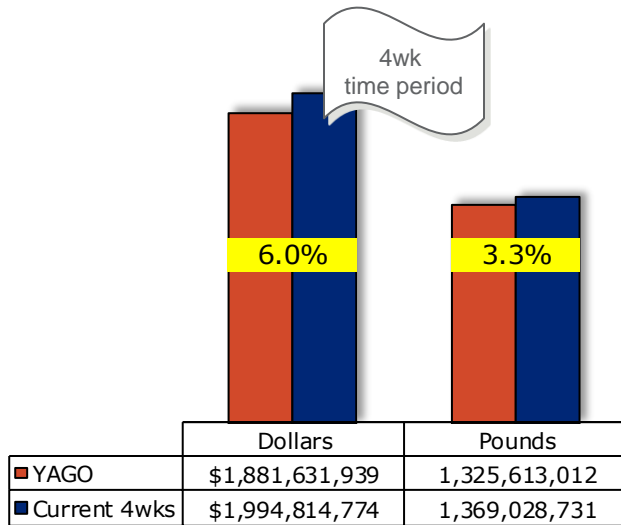
(FLM)/IRI
Multi-Outlet (MULO) Data Ending 11/1/2015

Fruit

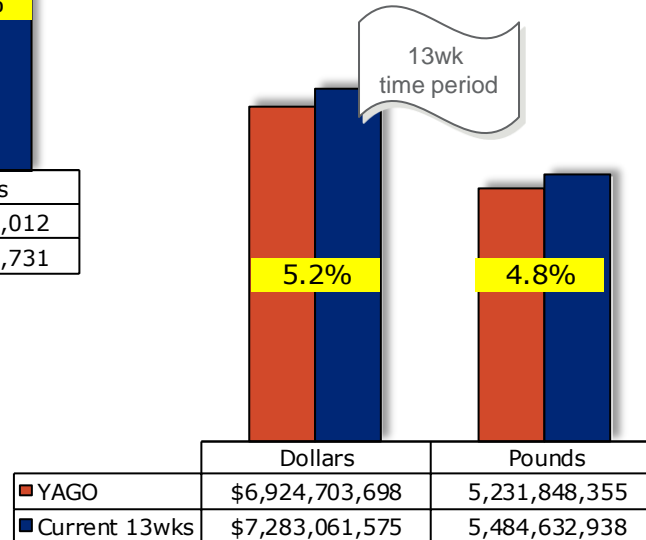
Fruit Summary

- Fruit pounds are up higher than dollars for the last 13 & 52 week time periods which points to lower pricing. The last 4 week data, dollars were gaining faster. We will have continue to monitor that trend to see if it continues
- Overall dollar trends for the last 4 & 13 week periods are stronger than the 52 week trends which points to accelerating growth. This was true as of the last update as well.
- We can now safely call Avocados & Tangerines are the perpetual “teenagers” in terms of \$\$ growth (their growth rates are in the teens). Avocados are even higher in Lb. growth with a +21% trend versus year ago
- Price per pound is down in 7 of the 8 regions. In the last update the pricing was down in 7 of 8 regions as well.

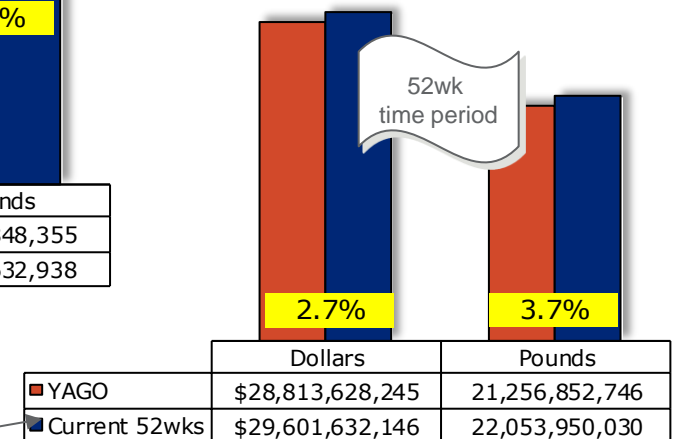
Total US Fruit Trends – 4, 13, 52wk time periods



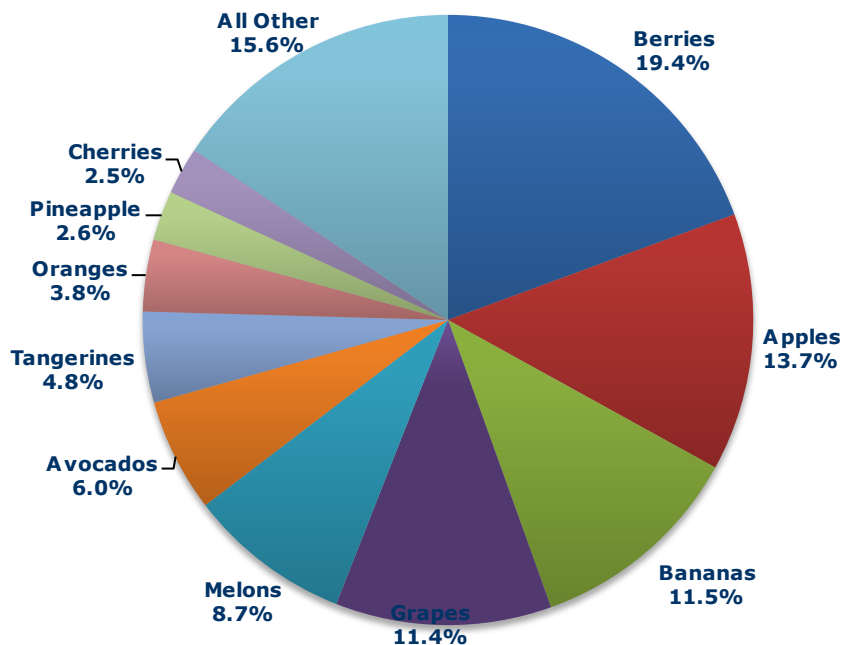
In the latest 4wk time period, Fruit dollars were up +6% and pounds were also strong & up +3.3%:



In the latest 52wk period, dollars grew +2.7%, pounds gained +3.7%:



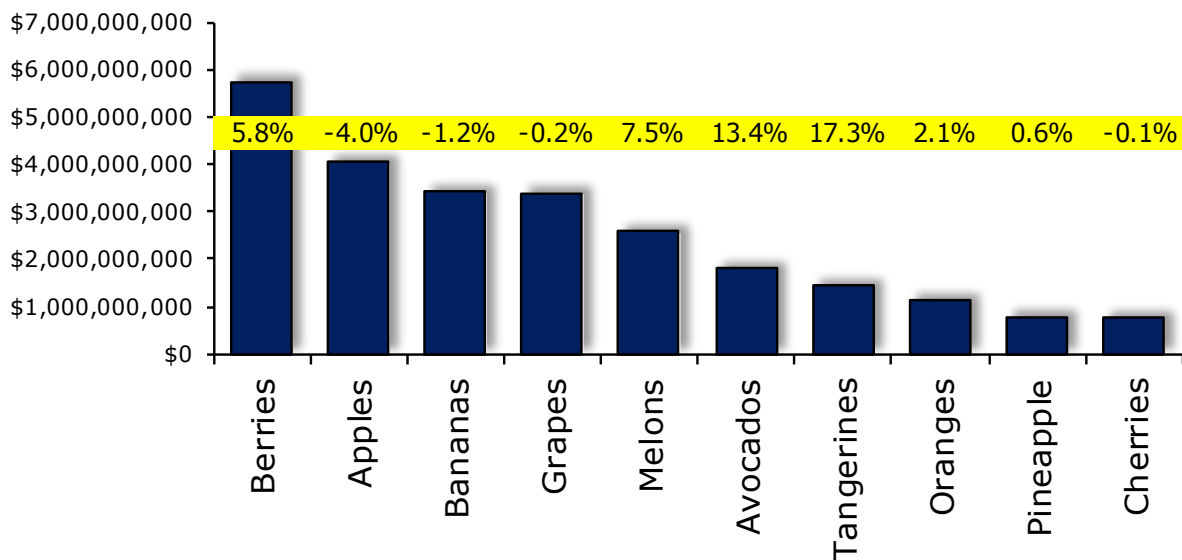
Fruit – % of Dollar Sales



Total US - Dollars

The berries category accounts for 19.4% of Total Fruit dollar sales:

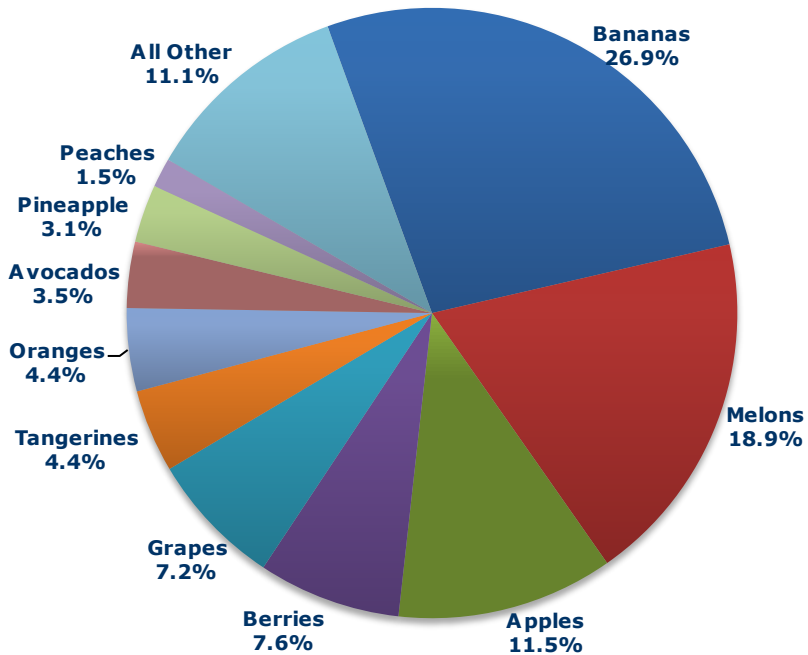
And the avocado and tangerine companies continue their strong results



Dollars	Current 52wks	% Chg
Berries	\$5,736,079,399	5.8%
Apples	\$4,041,662,579	-4.0%
Bananas	\$3,400,351,691	-1.2%
Grapes	\$3,387,781,542	-0.2%
Melons	\$2,561,331,837	7.5%
Avocados	\$1,782,615,982	13.4%
Tangerines	\$1,422,904,729	17.3%
Oranges	\$1,125,882,756	2.1%
Pineapple	\$778,983,917	0.6%
Cherries	\$744,704,314	-0.1%
Total Fruit	\$29,601,632,146	2.7%



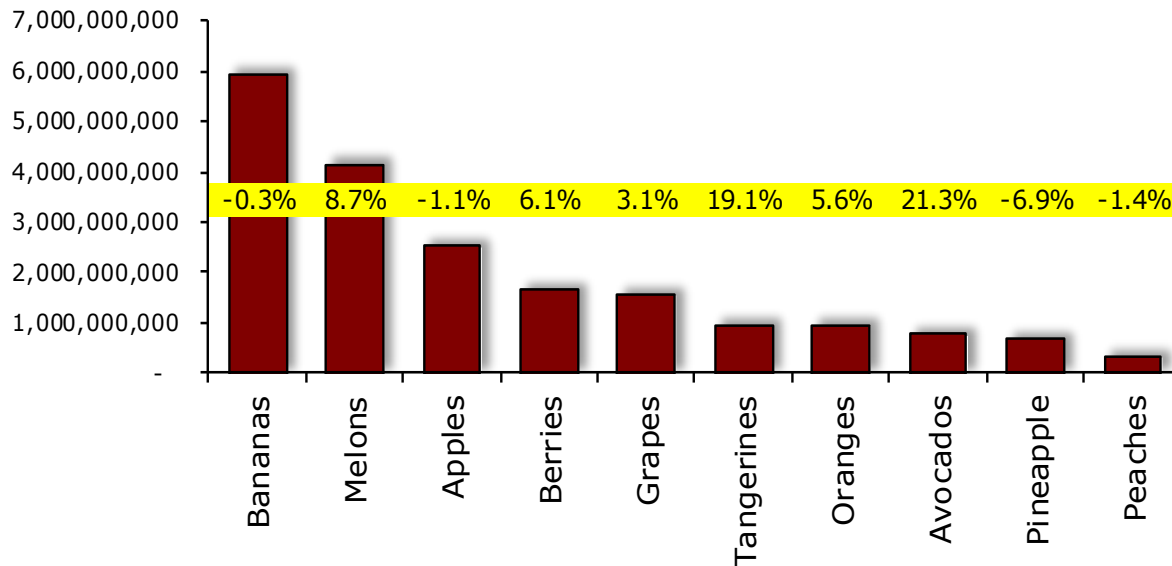
Fruit – % of Pound Sales



Total US - Pounds

Bananas account for 26.9% of total fruit pound sales:

Strong overall trends in melons as we head towards the end of the year



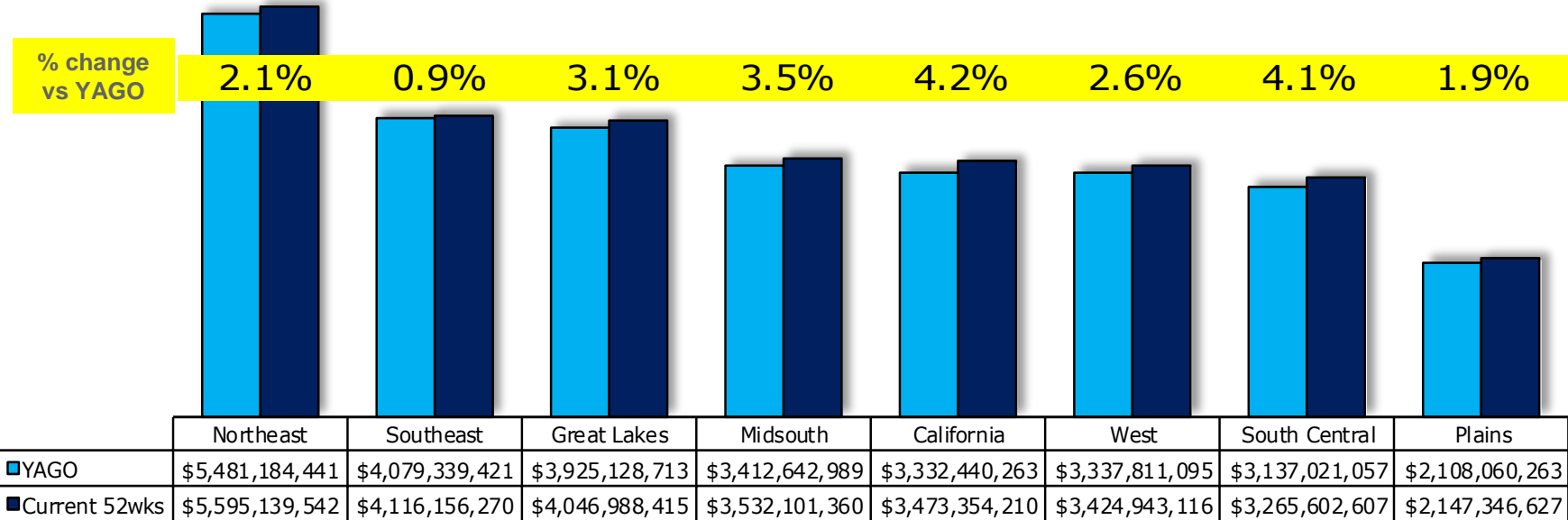
Pounds	Current 52wks	% Chg
Bananas	5,940,678,157	-0.3%
Melons	4,167,467,778	8.7%
Apples	2,530,994,924	-1.1%
Berries	1,667,365,029	6.1%
Grapes	1,577,139,810	3.1%
Tangerines	970,361,236	19.1%
Oranges	970,238,106	5.6%
Avocados	772,824,712	21.3%
Pineapple	676,804,798	-6.9%
Peaches	341,298,738	-1.4%
Total Fruit	22,053,950,030	3.7%



The Northeast accounts for almost 20% of the US Fruit dollar sales

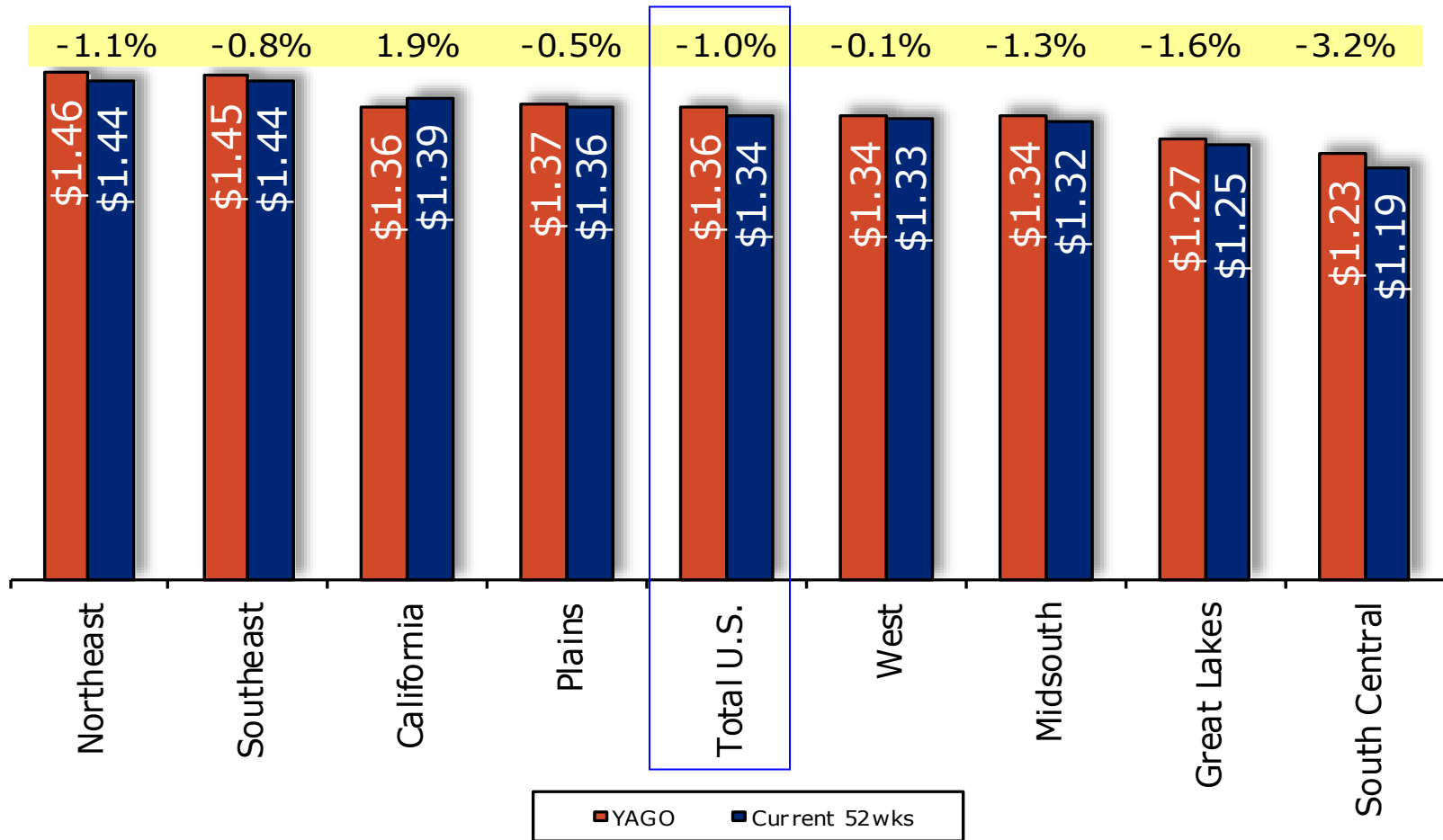
Dollar Trends by US Region – Fruit

Total US
2.7%



Fruit's average price/Lb. decreased -1% in the US 7 of 8 regions declined in price

Average Price/Lb. by Region – Fruit

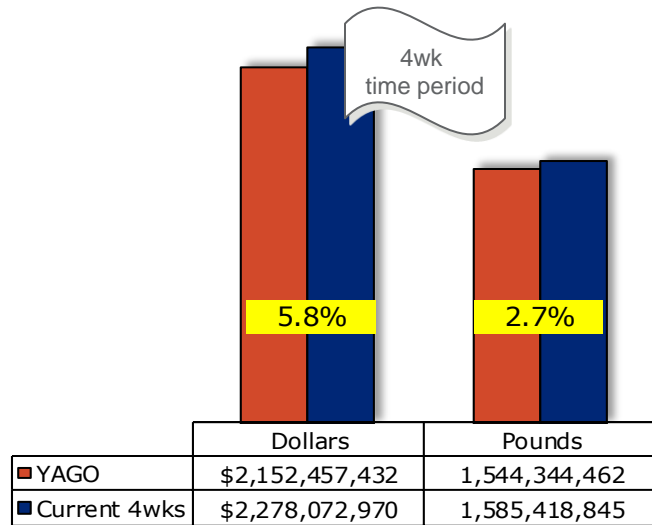


Vegetables

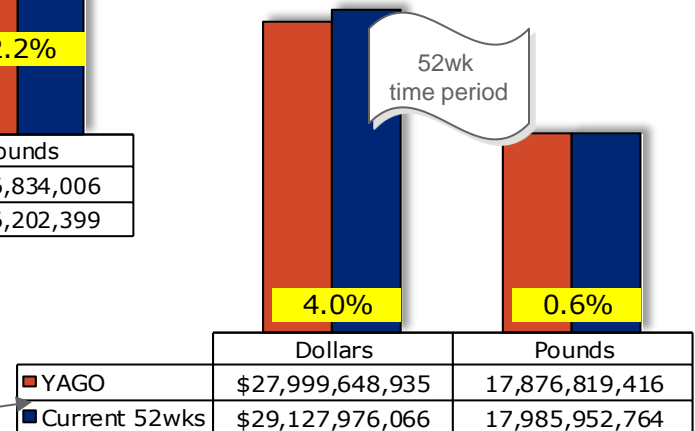
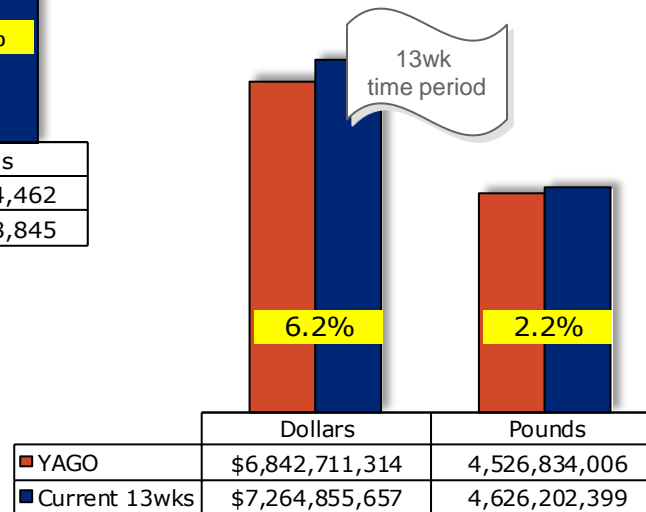
Vegetable Summary

- Vegetables continue to show different results than the fruit category
 - Dollar sales are growing faster than pound sales in all time periods.
 - There continues to be a significant gap in the last 4 and 13 week numbers, The 4 week gap was 3.1% and the 13 week gap was 4%
- Bagged salads - Bagged Salads – Bagged Salads. They were up 20.8% in \$\$s vs year ago. While other categories showed positive trends, no other category was up in double digits.
- For the second update in a row, the potato, onion, and carrot categories all showed negative trends.
- Pricing was up in each and every region versus year ago and CA was up over 8% versus YAG. In the last update, CA was up over 8% as well.

Total US Vegetable Trends – 4, 13, 52wk time periods



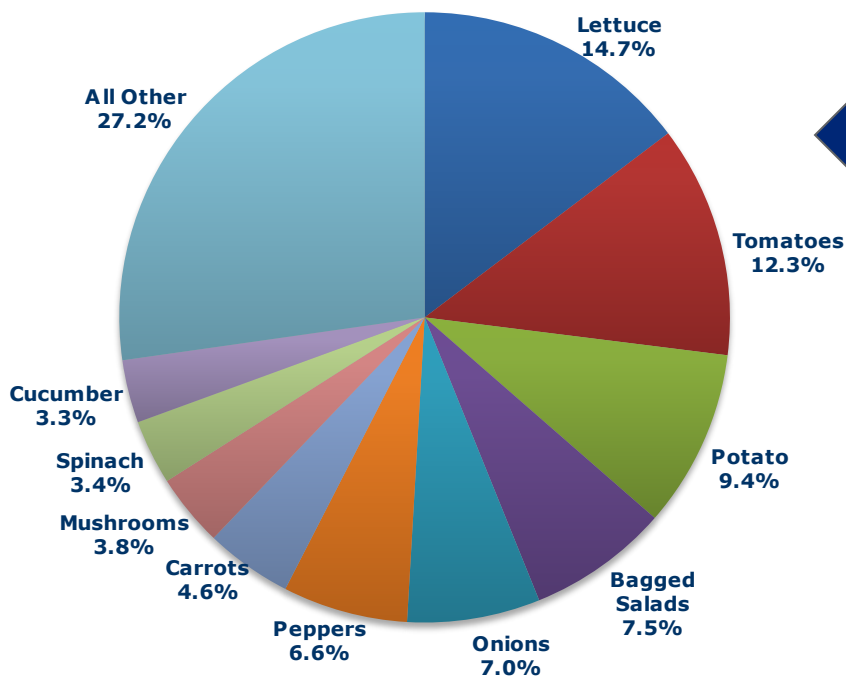
In the latest 4wk time period, Vegetables dollars were up +5.8% vs. the previous year – pounds increased +2.7%:



In the latest 52wk period, dollars grew +4%, pounds gained +0.6%:

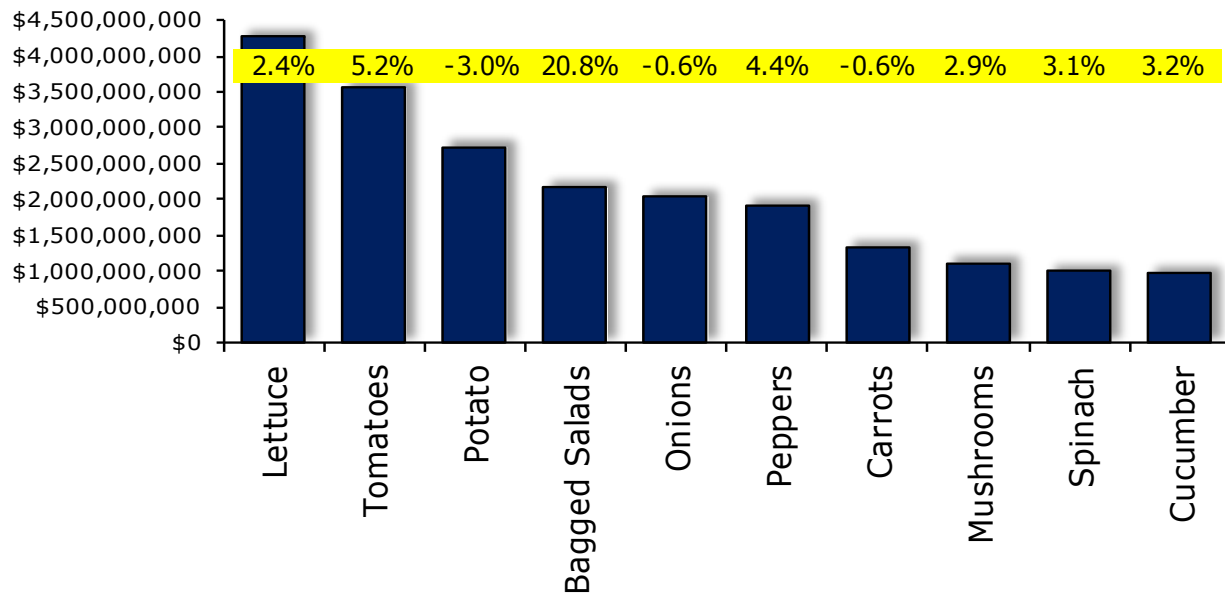
Vegetables – % of Dollar Sales

Total US - Dollars



Total category up 4%

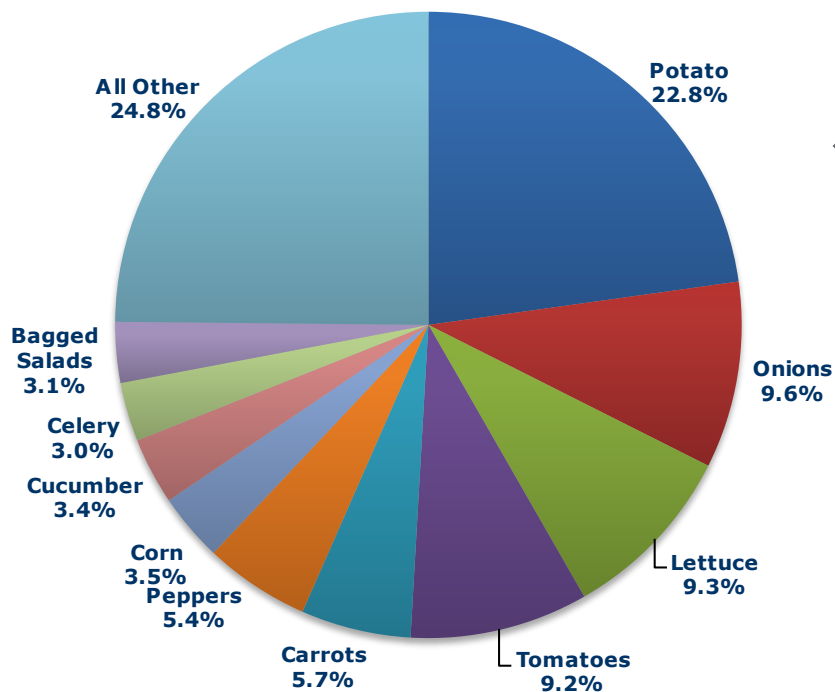
The double digit growth rates continue for bagged salads



Dollars	Current 52wks	% Chg
Lettuce	\$4,279,157,799	2.4%
Tomatoes	\$3,579,895,073	5.2%
Potato	\$2,747,730,237	-3.0%
Bagged Salads	\$2,174,618,618	20.8%
Onions	\$2,050,618,250	-0.6%
Peppers	\$1,928,556,522	4.4%
Carrots	\$1,340,979,883	-0.6%
Mushrooms	\$1,120,421,732	2.9%
Spinach	\$998,762,992	3.1%
Cucumber	\$970,492,957	3.2%
Vegetables	\$29,127,976,066	4.0%



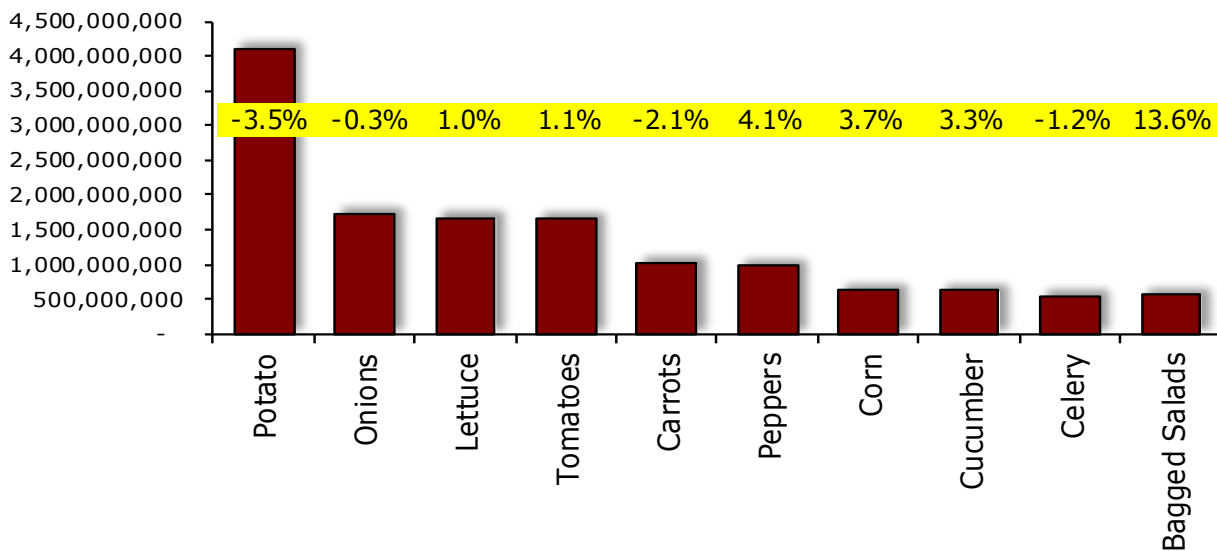
Vegetables – % of Pound Sales



Total US - Pounds

Potato account for 22.8% of Total Vegetables pound sales:

And Potato saw a -3.5% decrease in pound sales vs. YAGO:



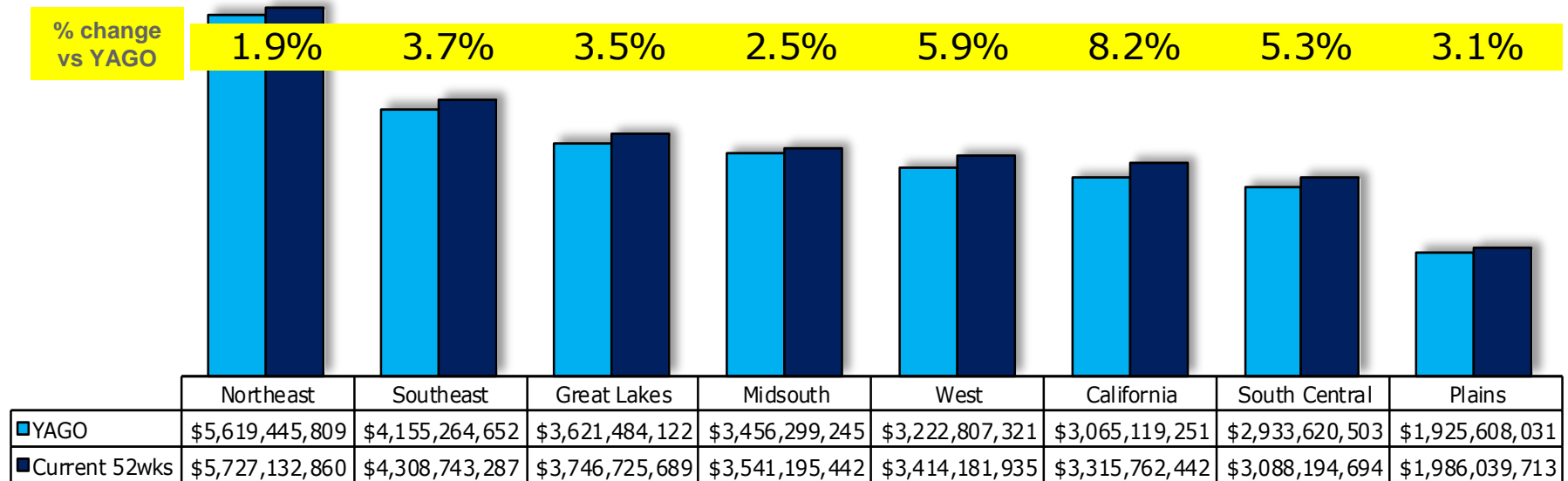
Pounds	Current 52wks	% Chg
Potato	4,098,245,790	-3.5%
Onions	1,733,064,831	-0.3%
Lettuce	1,670,639,120	1.0%
Tomatoes	1,654,526,593	1.1%
Carrots	1,020,668,615	-2.1%
Peppers	979,442,463	4.1%
Corn	630,694,450	3.7%
Cucumber	620,367,329	3.3%
Celery	546,981,861	-1.2%
Bagged Salads	563,505,969	13.6%
Total Veg	17,985,952,764	0.6%



The Northeast region accounts for 19.7% of the US Vegetables dollar sales with a +1.9% increase vs. a year ago:

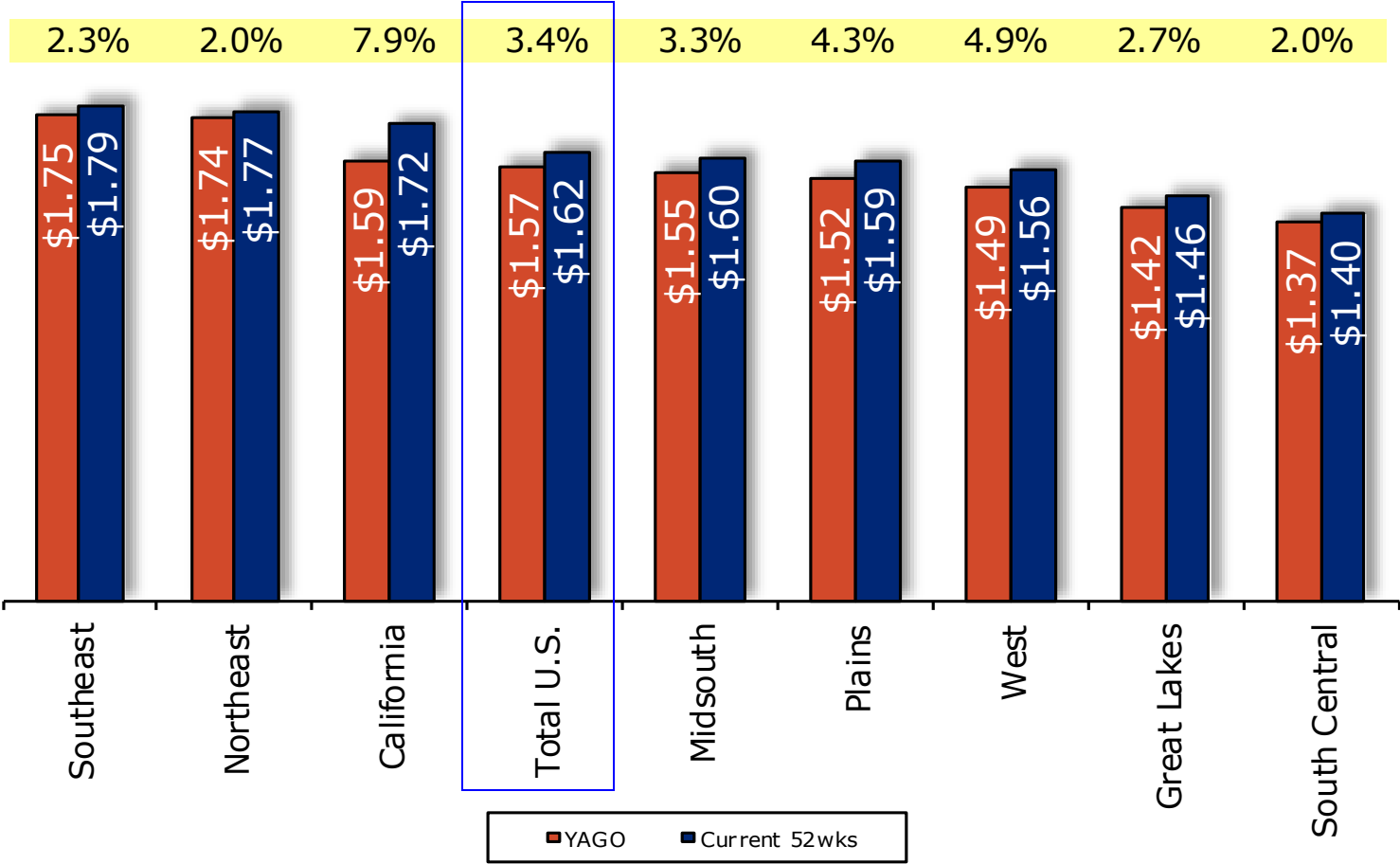
Dollar Trends by US Region – Vegetables

Total US
4.0%



Vegetables' average price/Lb. increased +3.4% in the US – each of the regions saw an increase in price:

Average Price/Lb. by Region – Vegetables



What are your new goals for 2016?

How did you do in comparison
to your competition?

Let's talk about getting you
the answers and action plans you need for
a more profitable new year!

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