



Q1 2016 Fresh Produce Review

Data from FreshLook Marketing/Information Resources

(FLM)/IRI

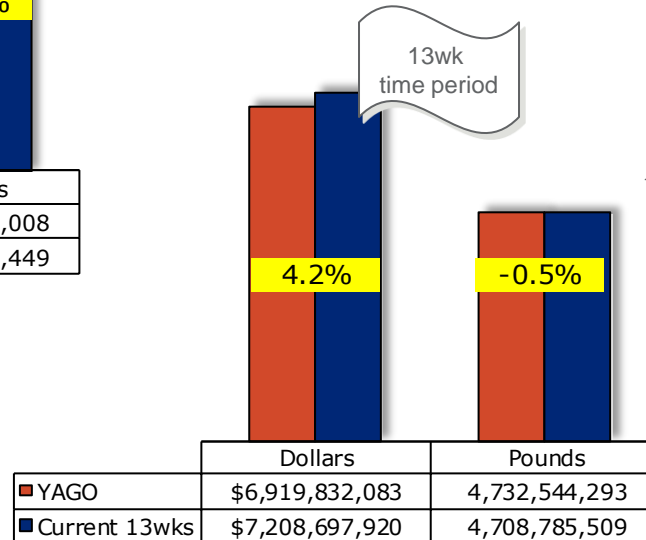
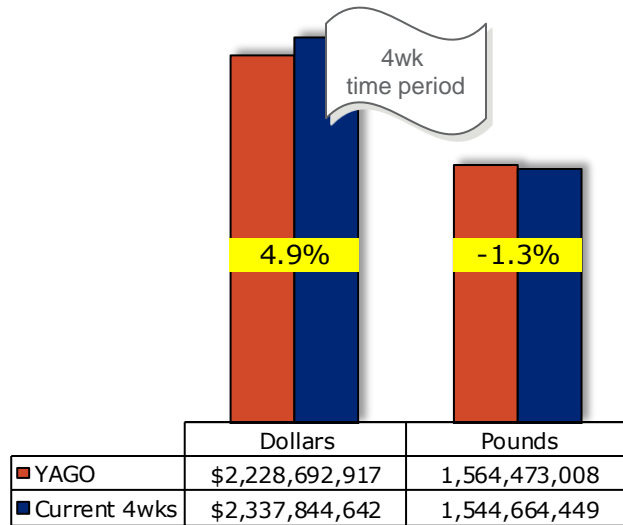
Multi-Outlet (MULO) Data Ending 3/20/2016

Fruit

Fruit Summary

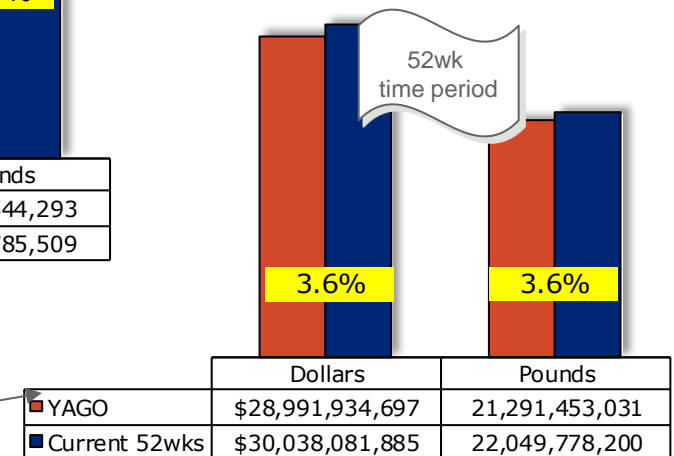
- 2016 has started out well for dollar volume in comparison to 2015, but volume is slower than at the end of 2015
 - 2016 Dollars are up 4.2% (13 weeks YTD) versus 2015 which was up 3.2%
 - 2016 Pound volume is down .5%, however. (13 weeks YTD) versus 2015 which was up 4.1%
- There is continued consistency in the top growing categories.
 - Avocados, Tangerines, Berries, and Melons
- Apples, Bananas, and Cherries were the only categories with negative dollar trends.
- Overall Fruit Dollar trends overall were positive in every IRI region of the US with South Central leading the way.
- Total US price per pound was flat.

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

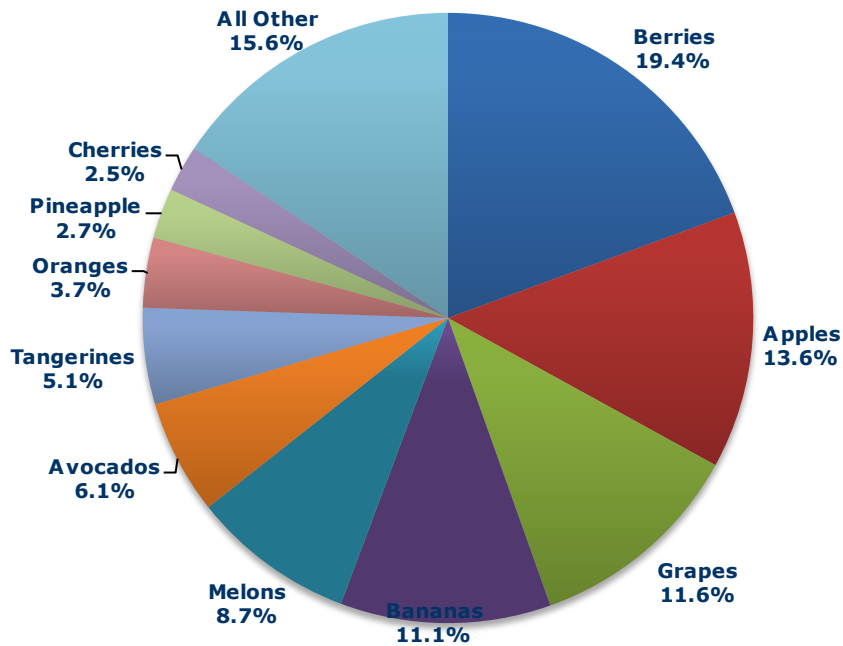


In the latest 13wks, Fruit dollars increased and pound sales declined:

In the latest 52wk period, dollars grew +3.6%, pounds gained +3.6%:



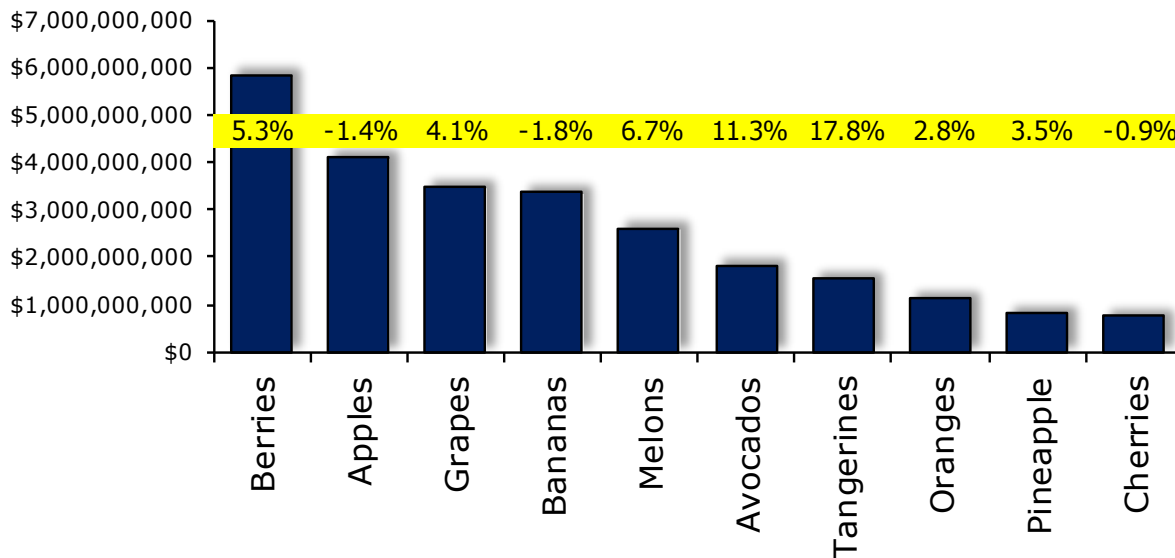
Fruit – % of Dollar Sales



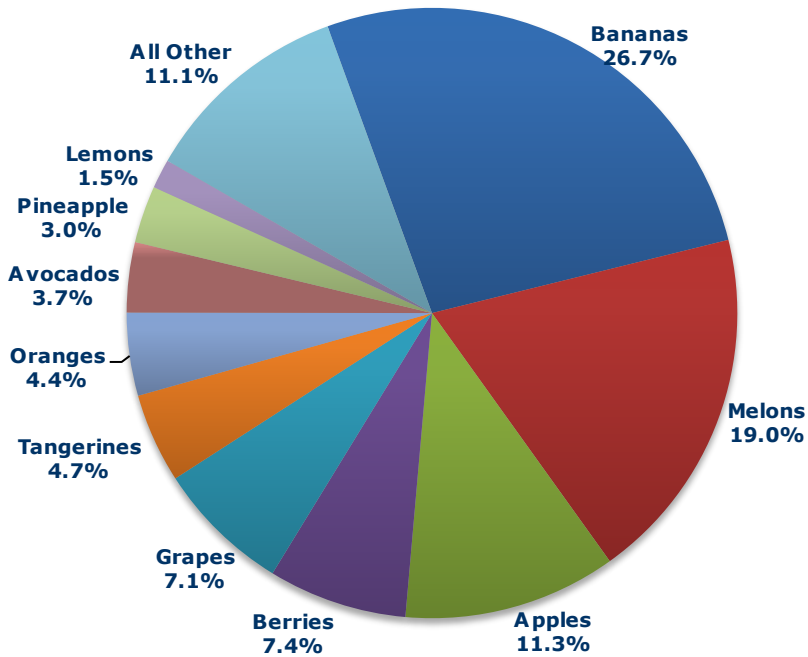
Total US - Dollars

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

| Dollars | Current 52wks | % Chg |
|--------------------|-------------------------|-------------|
| Berries | \$5,822,976,078 | 5.3% |
| Apples | \$4,091,522,291 | -1.4% |
| Grapes | \$3,469,504,988 | 4.1% |
| Bananas | \$3,348,494,668 | -1.8% |
| Melons | \$2,599,027,818 | 6.7% |
| Avocados | \$1,823,996,049 | 11.3% |
| Tangerines | \$1,534,845,539 | 17.8% |
| Oranges | \$1,113,927,723 | 2.8% |
| Pineapple | \$802,589,477 | 3.5% |
| Cherries | \$737,921,282 | -0.9% |
| Total Fruit | \$30,038,081,885 | 3.6% |

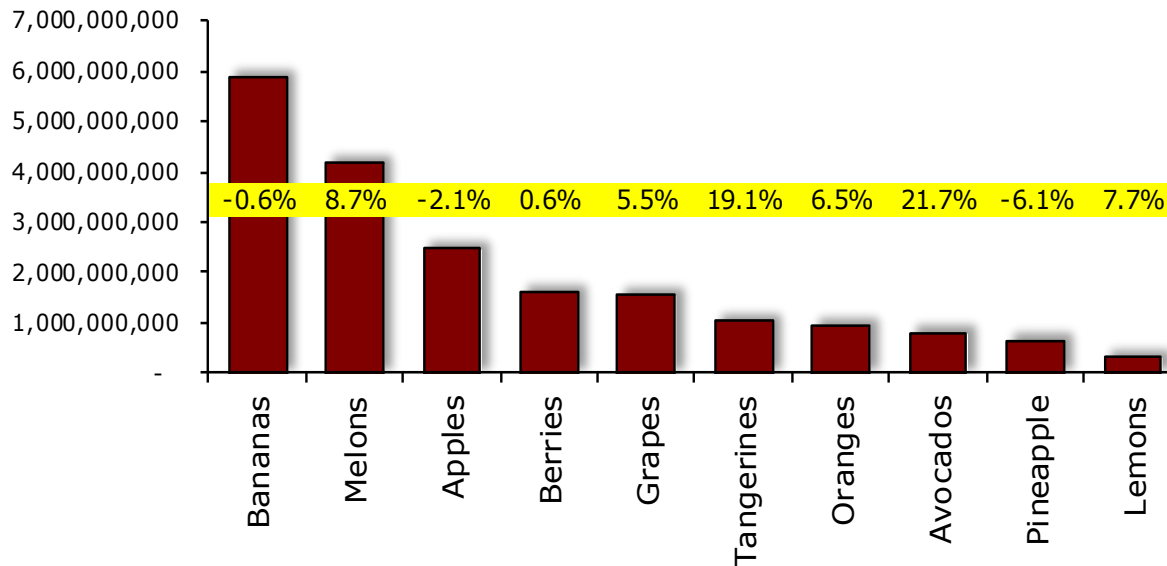


Fruit – % of Pound Sales



Total US - Pounds

Tangerines and Avocados continued to show large increases



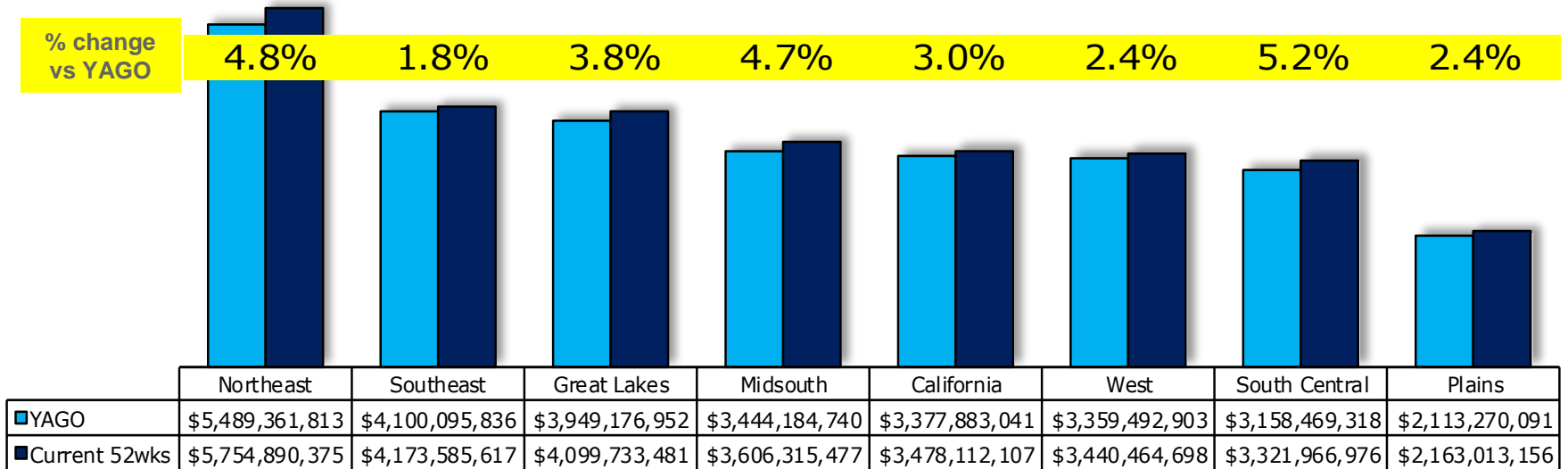
| Fruit | Pounds | Current 52wks | % Chg |
|--------------------|-----------------------|---------------|-------------|
| Bananas | 5,887,044,993 | | -0.6% |
| Melons | 4,181,425,001 | | 8.7% |
| Apples | 2,487,774,259 | | -2.1% |
| Berries | 1,622,083,750 | | 0.6% |
| Grapes | 1,573,923,311 | | 5.5% |
| Tangerines | 1,047,252,191 | | 19.1% |
| Oranges | 969,047,413 | | 6.5% |
| Avocados | 818,956,318 | | 21.7% |
| Pineapple | 667,341,511 | | -6.1% |
| Lemons | 341,578,518 | | 7.7% |
| Total Fruit | 22,049,778,200 | | 3.6% |



All regions showed an increase in dollar trends

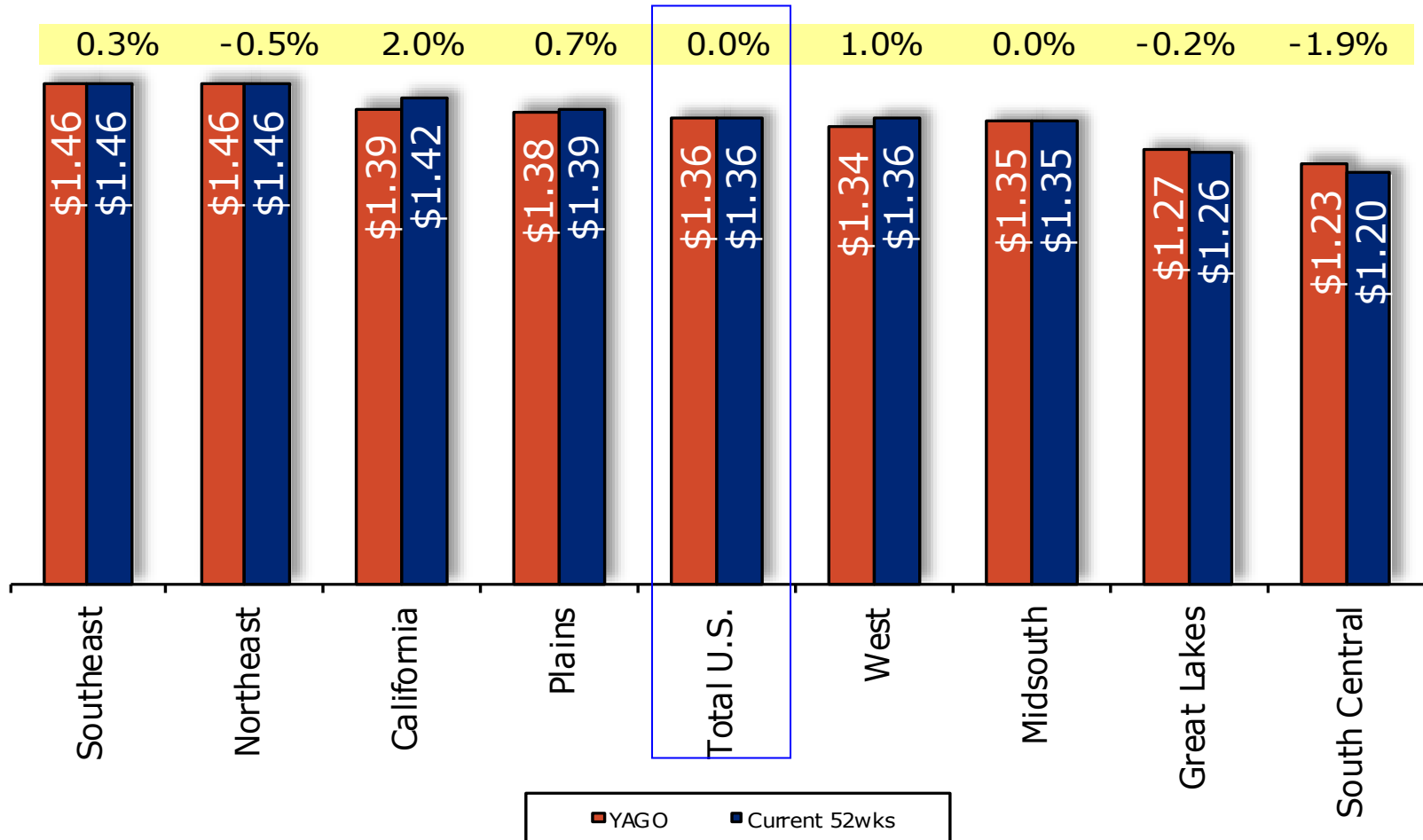
Dollar Trends by US Region – Fruit

Total US
3.6%



Fruit's average price/Lb was flat in the US vs. the previous year – 4 of the regions saw an increase in price:

Average Price/Lb by Region – Fruit

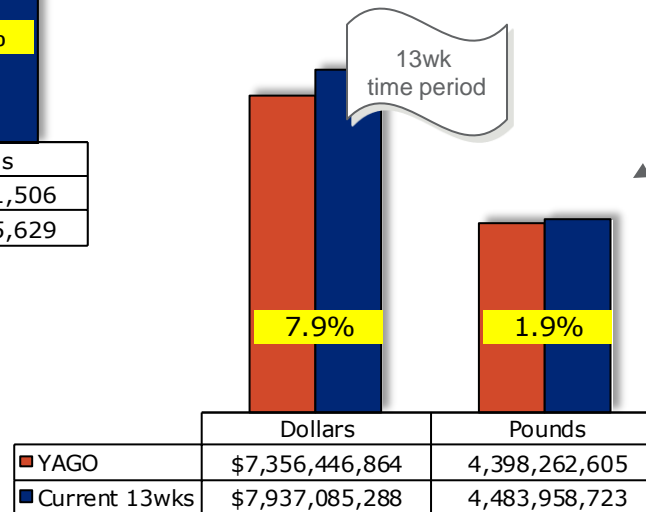
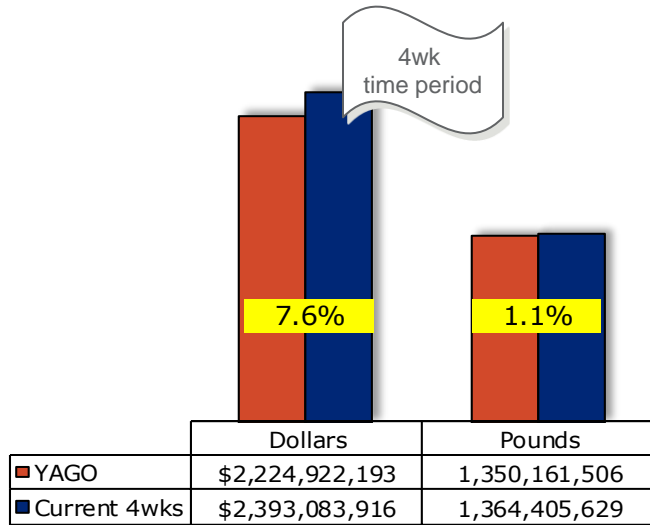


Vegetables

Vegetable Summary

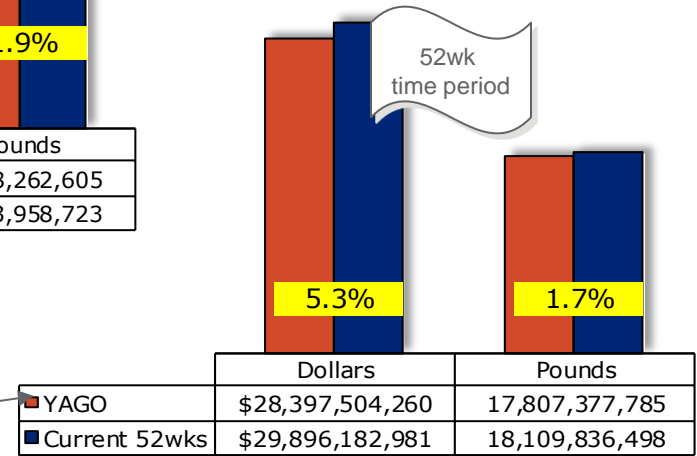
- Overall the vegetable category is growing at a higher rate in 2016 than it did in 2015.
- Bagged Salads continue their very strong trends in both dollars and pounds
- Dollar trends overall were positive in every IRI region of the US.
- Price per pound was up in all 8 regions over the last 52 weeks.

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

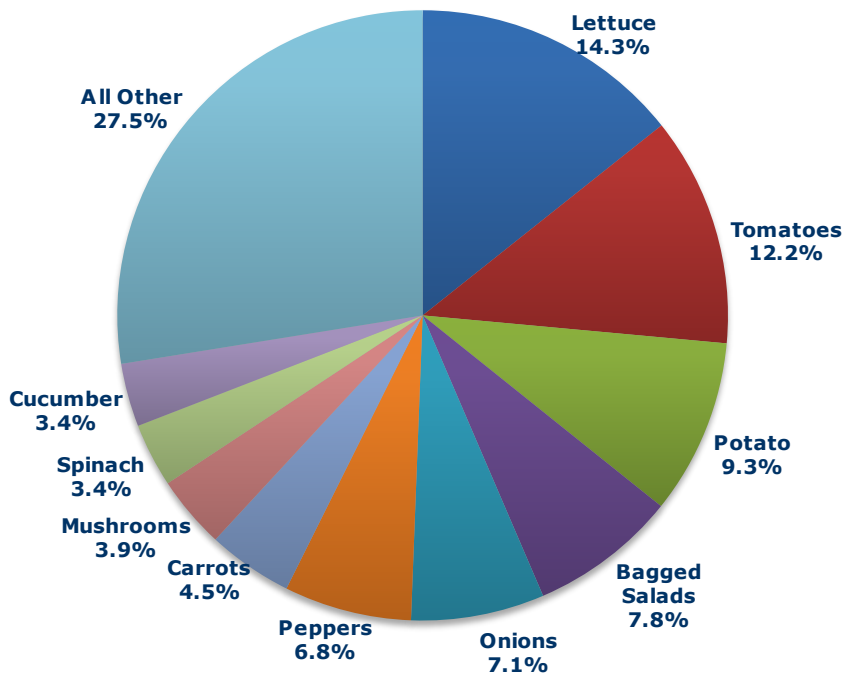


In the latest 13wks, Vegetables dollars increased and pound sales gained:

In the latest 52wk period, dollars grew +5.3%, pounds gained +1.7%:

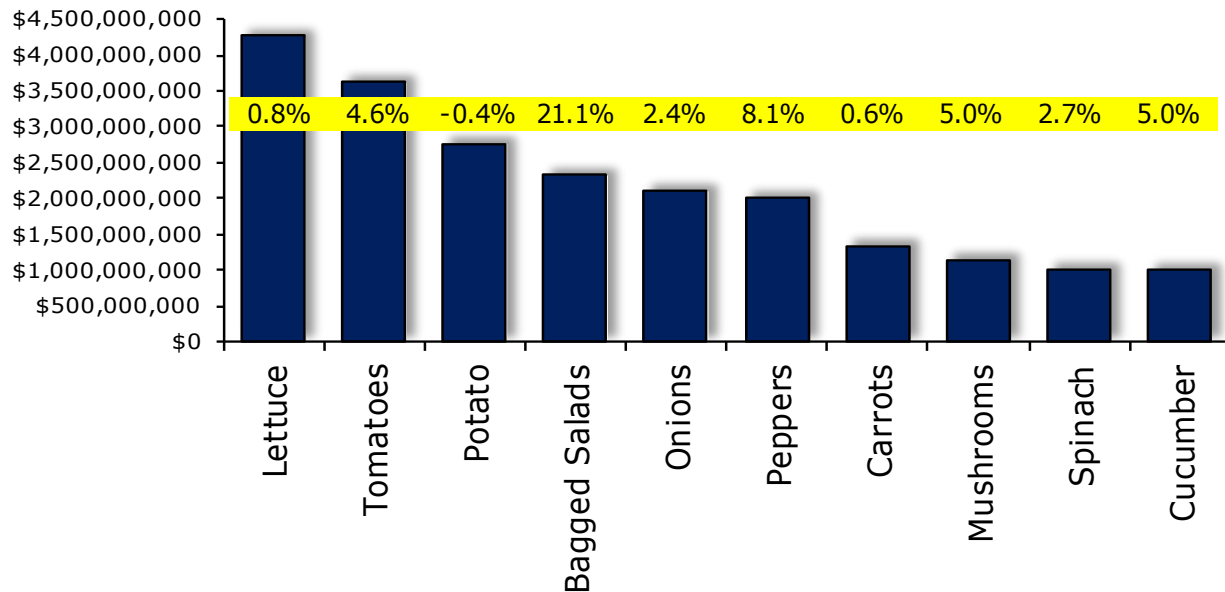


Vegetables – % of Dollar Sales



Total US - Dollars

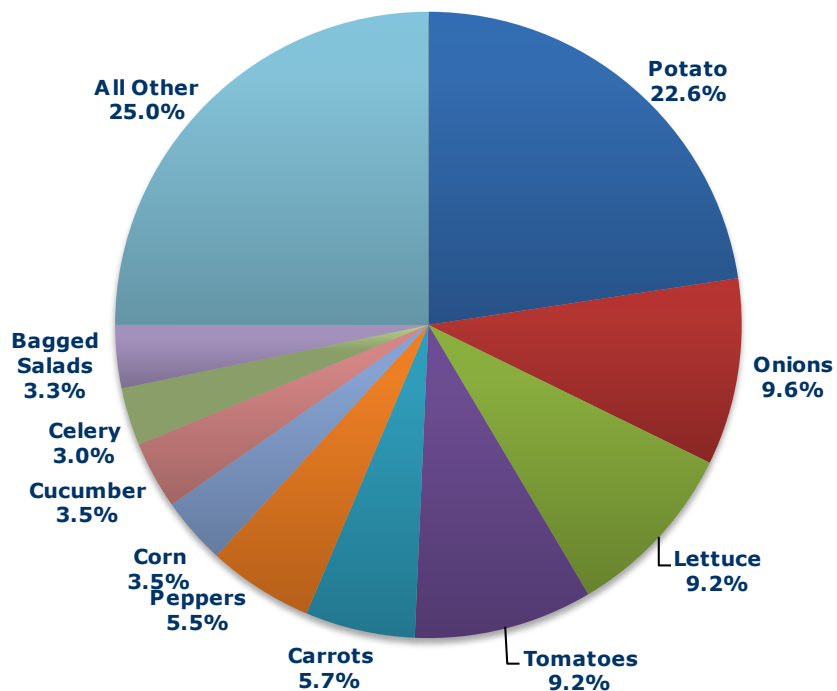
Bagged Salads saw a +21% increase in dollars vs. the previous year:



| Dollars | Current 52wks | % Chg |
|-------------------|-------------------------|-------------|
| Lettuce | \$4,275,390,506 | 0.8% |
| Tomatoes | \$3,635,493,738 | 4.6% |
| Potato | \$2,775,381,650 | -0.4% |
| Bagged Salads | \$2,332,128,203 | 21.1% |
| Onions | \$2,111,769,156 | 2.4% |
| Peppers | \$2,018,050,639 | 8.1% |
| Carrots | \$1,349,326,061 | 0.6% |
| Mushrooms | \$1,152,032,090 | 5.0% |
| Spinach | \$1,010,584,593 | 2.7% |
| Cucumber | \$1,002,045,430 | 5.0% |
| Vegetables | \$29,896,182,981 | 5.3% |

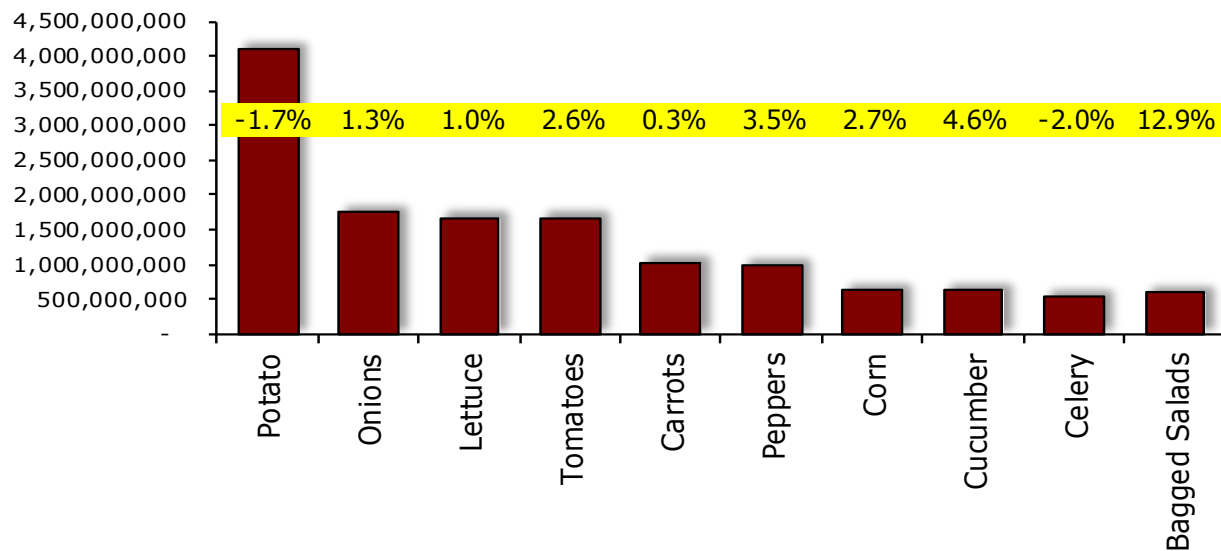


Vegetables – % of Pound Sales



Total US - Pounds

Potatoes account for the largest of Total Vegetables pound sales:



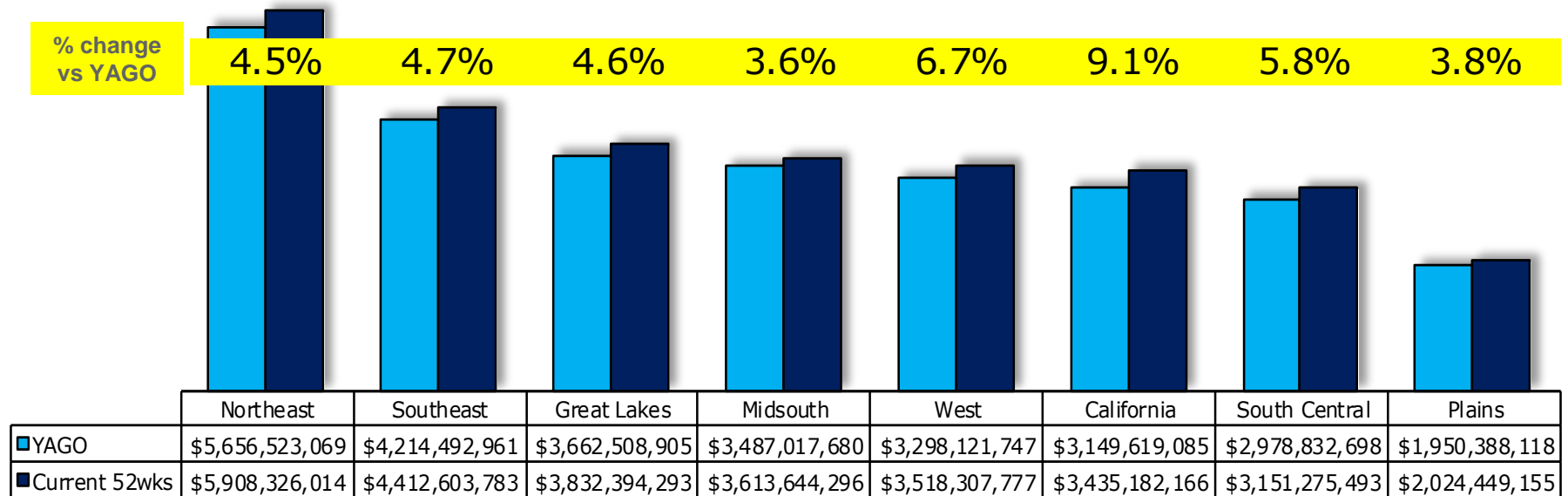
| Pounds | Current 52wks | % Chg |
|------------------|-----------------------|-------------|
| Potato | 4,095,007,308 | -1.7% |
| Onions | 1,745,920,721 | 1.3% |
| Lettuce | 1,669,894,301 | 1.0% |
| Tomatoes | 1,670,076,674 | 2.6% |
| Carrots | 1,026,255,625 | 0.3% |
| Peppers | 988,872,872 | 3.5% |
| Corn | 626,525,336 | 2.7% |
| Cucumber | 631,510,904 | 4.6% |
| Celery | 539,973,288 | -2.0% |
| Bagged Salads | 589,077,870 | 12.9% |
| Total Veg | 18,109,836,498 | 1.7% |



The Northeast region accounts for 19.8% of the US Vegetables dollar sales with a +4.5% increase vs. a year ago:

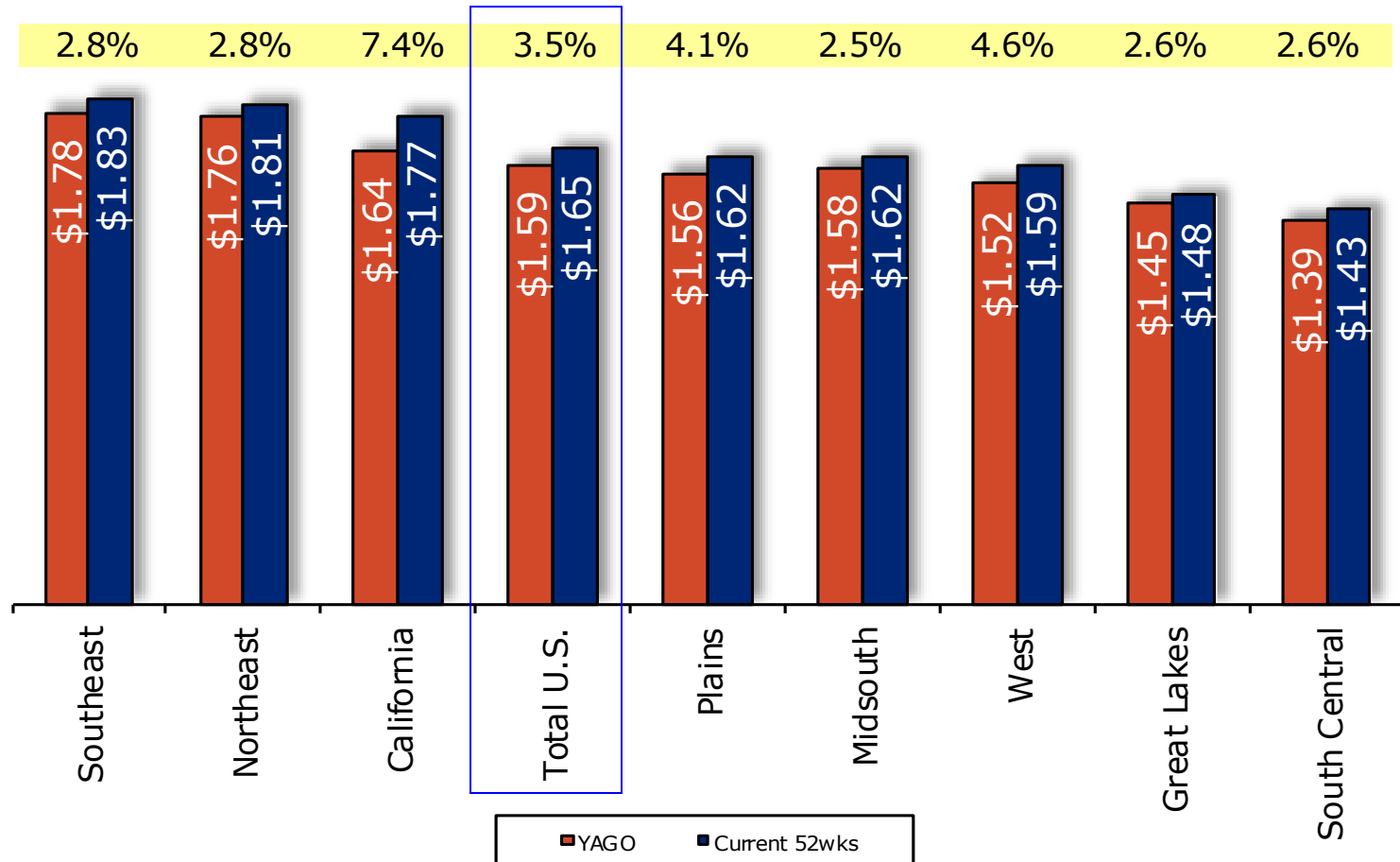
Dollar Trends by US Region – Vegetables

Total US
5.3%



Vegetables' average price/Lb increased +3.5% in the US ALL of the regions saw an increase in price:

Average Price/Lb by Region – Vegetables



The data has a little lag in getting to you but
Don't let your marketing and sales needs
slow you down
Give me a call to discuss how
We can help you this year.

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