FreshFacts® on Retail

Q1 2020

www.unitedfresh.org

Fresh at Retail

Whole and Fresh Cut Produce Trends: Q1 (January – March) 2020

We have seen an unprecedented rise in in-home food & beverage consumption triggered by the Novel Coronavirus, COVID-19. Fresh produce is growing, albeit not at the rate of center store. With health as a top concern, consumers continue to buy fresh food with immune boosting properties, while also supplementing with shelf stable and frozen options. Although this report typically focuses on the full quarter, we have seen some changes in consumer purchase behavior in the last half of the quarter due to the varying degrees of restricted living practiced across the country. Therefore in certain cases we will show comparison between first half and second to highlight some of these changes.

We continue to provide a look at performance of the past eight quarters for greater context of performance for spotlight categories. Each issue includes detailed data for value-added, packaged salads, and organic produce. Additionally, sales data for products sold entirely as individual units is reported as units while the remaining categories are still reported in pounds. Look for an asterisk to denote those products. In order to get a true sense of performance within the quarter, the household penetration numbers are adjusted to reflect only the current quarter instead of the full 52 week period.

We Want to Hear From You Our goal is to create an insights-based report you look forward to each quarter. The partnership between United Fresh and Nielsen Fresh welcomes any feedback.

This report is just the tip of the iceberg when it comes to what's available in fresh. For questions, ideas, or to learn more about further produce reporting (including a discount for syndicated reporting for United Fresh members), please email **mike.galaburda@nielsen.com**.

We look forward to hearing from you!
- The United Fresh and Nielsen teams

Table of Contents

REPORT HIGHLIGHTS

- The ongoing Covid-19 pandemic has resulted in an unprecedented rise in in-home consumption, driving sales of food & beverage categories. While center store registers the most growth, perimeter departments are seeing growth as well.
- Household trips and average dollar per buyer have increased across a number of fresh produce categories.
- Strawberries and raspberries benefit by extending their reach among the U.S. households and are also driving higher trips. Among vegetables, potatoes, tomatoes and cucumbers have enticed higher average dollar spend per buyer, leading to growth.
- A variety of fruits and vegetables continue to influence overall organic growth and also present opportunities to innovate and attract health conscious consumers.

Source: Nielsen Total Food View, Total U.S. xAOC, 13 Weeks Ending 3/28/20:, UPC-coded and random-weight/Non-UPC data; Nielsen Homescan

UNITED FRESH PRODUCE ASSOCIATION

Total Produce Perspective

Whole and Fresh Cut Produce Trends: Q1 2020

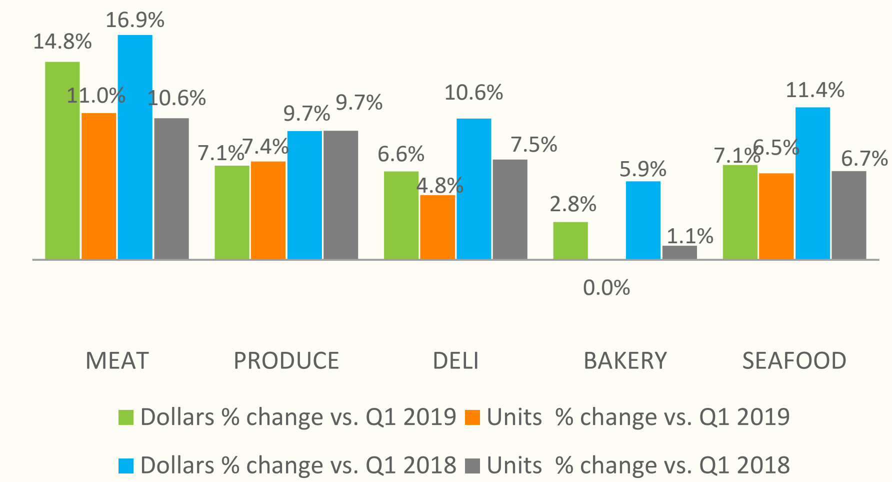
Meat leads perimeter growth; Pandemic buying drove unprecedented growth in center store

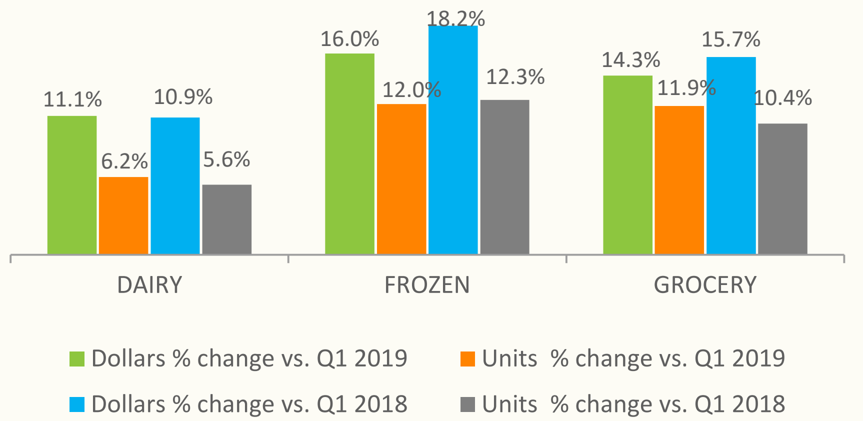
9.0% Increase in **household trips** to purchase **fresh** vs. 52 weeks year ago

4.1% Change in household trips to purchase **produce** vs. 52 weeks year ago

Produce is **33%** of total fresh sales, second to the Meat department.

FRESH DEPARTMENT SALES CHANGE
Q1 2020 vs. Q1 2019 & Q1 2018





About the Measures

Dollars
Total dollar sales

Pounds
Total pounds sold, all items converted to a pounds metric unless noted by an * for those products exclusively sold as a unit

Average Retail Price
Total dollars divided by total pounds

Percent Change
Percent difference between the current year versus the same period a year ago

Basket Size
Average amount spent in the store when the product is in the transaction

Households Buying
Percent of US households purchasing at least once within the last year

Trips per Year
Average number of times the product was purchased by US households annually

THE PRODUCE DEPARTMENT GENERATED $16.3B IN Q1 2020

	Dollars	% Change versus Q1 2019	% Change versus Q1 2018	Pounds	% Change versus Q1 2019	% Change versus Q1 2018	Average Retail Price	% Change versus Q1 2019
Total Produce	$16,342 M	7.1%	9.7%	10,031 M	8.2%	8.3%	$1.63	-1.0%
Vegetables	$8,349 M	8.9%	14.4%	4,879 M	9.5%	10.1%	$1.71	-0.6%
Fruit	$7,507 M	5.0%	4.4%	4,934 M	6.9%	6.2%	$1.52	-1.8%
Other Produce	$486 M	9.3%	16.0%	218 M	8.0%	18.7%	$2.23	1.2%

nielsen

Source: Nielsen Total Food View, Total U.S. xAOC, 13 Weeks Ending 3/28/20:, UPC-coded and random-weight/Non-UPC data; Nielsen Homescan

UNITED FRESH
PRODUCE ASSOCIATION

Top 10 Fruit Trends

Q1 2020

Fresh fruit sales driven by trips and spend, benefitting staple fruits and berries

Fruit sales in the U.S. topped $7.5 Billion in the latest quarter, registering a +5.1% increase compared to a year ago. Apples remain America's top selling fruit, with sales of over $1 Billion, while Bananas and Grapes round out the top three.

With exception of Grapes, dollar sales were up in all of the top ten categories. Raspberries (+15.0%) and Strawberries (+11.1%) top the growth chart while rising prices drive Avocados dollars despite a decline in volume sales.

While household penetration fell for Fruits overall (-0.9pts to 91.6%), a simultaneous increase in the number of trips and average dollar spend per buyer have contributed to growth.

Top Fruit Categories Q1 2020	Households Buying In Q1 2020	Dollars	% Change versus Q1 2019	% Change versus Q1 2018	Pounds/ Units*	% Change versus Q1 2019	% Change versus Q1 2018	Average Price per Pound/ Unit*	% Change versus Q1 2019
Apples	52%	$1,030 M	2.1%	4.1%	645 M	8.8%	9.1%	$1.60	-6.2%
Bananas	68%	$843 M	5.3%	5.6%	1,502 M	5.6%	7.3%	$0.56	-0.2%
Grapes	38%	$772 M	-1.3%	-1.0%	333 M	5.1%	8.8%	$2.32	-6.1%
Strawberries*	40%	$752 M	11.1%	12.9%	228 M	19.2%	9.1%	$3.30	-6.8%
Avocados	32%	$610 M	9.8%	17.0%	288 M	-3.7%	12.6%	$2.12	14.0%
Mandarins	31%	$589 M	7.7%	-8.9%	417 M	8.5%	-6.0%	$1.41	-0.8%
Blueberries*	28%	$454 M	3.9%	11.9%	128 M	1.0%	11.6%	$3.54	2.9%
Oranges	30%	$361 M	3.3%	-4.6%	304 M	6.8%	0.6%	$1.19	-3.3%
Raspberries*	14%	$271 M	15.0%	22.5%	79 M	29.1%	37.1%	$3.44	-10.9%
Lemons	NA	$184 M	1.4%	1.4%	98 M	13.8%	12.7%	$1.88	-10.9%

Source: Nielsen Total Food View, Total U.S. xAOC, 13 Weeks Ending 3/28/20:, UPC-coded and random-weight/Non-UPC data; Nielsen Homescan
** Denotes categories reported in units instead of pounds, and average price per unit instead of average price per pound*

nielsen

UNITED FRESH PRODUCE ASSOCIATION

Top 10 Vegetable Trends

Q1 2020

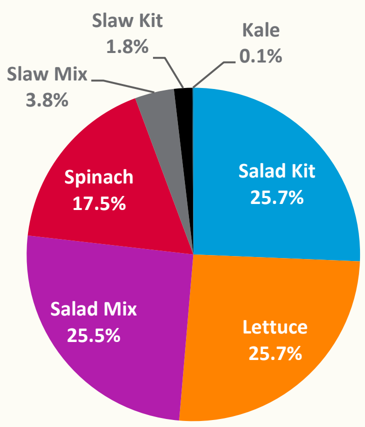
Potatoes and tomatoes stock the pantry

Vegetable dollar sales reached a high of $8.3 Billion, up 8.9% and backed by a +9.5% growth in volume sales. While we see broad growth among all top ten Vegetables categories, Potatoes, Tomatoes and Cucumbers have out-performed others this quarter.

While household penetration fell for Vegetables overall (-0.7pts to 93.9%), a simultaneous increase in the number of trips and average dollar spend per buyer have contributed to growth.

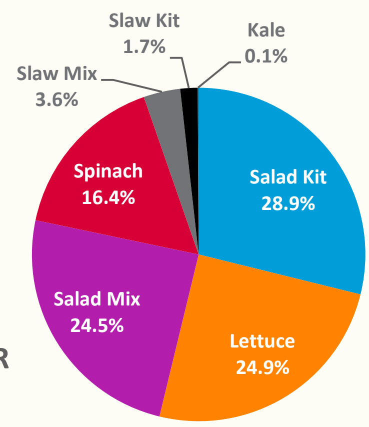
Top Vegetable Categories Q1 2020	Households Buying In Q1 2020	Dollars	% Change versus Q1 2019	% Change versus Q1 2018	Pounds/ Units*	% Change versus Q1 2019	% Change versus Q1 2018	Average Price per Pound/ Unit*	% Change versus Q1 2019
Pre packaged salads*	59%	$1,366 M	9.1%	12.2%	479 M	8.2%	9.8%	$2.85	0.9%
Potatoes	64%	$1,032 M	17.5%	18.1%	1,279 M	12.2%	6.7%	$0.81	4.8%
Tomatoes	57%	$1,030 M	15.3%	15.9%	447 M	5.4%	10.1%	$2.30	9.5%
Onions	62%	$607 M	8.8%	17.5%	525 M	11.9%	13.7%	$1.16	-2.7%
Bell Peppers	46%	$479 M	7.6%	14.5%	195 M	14.7%	20.4%	$2.46	-6.2%
Lettuce	44%	$444 M	4.0%	12.8%	245 M	6.9%	3.1%	$1.81	-2.7%
Carrots	55%	$379 M	6.6%	7.5%	302 M	8.1%	8.6%	$1.26	-1.4%
Mushrooms	30%	$329 M	7.9%	8.6%	76 M	4.4%	4.0%	$4.36	3.4%
Cucumbers	36%	$295 M	12.3%	18.9%	216 M	7.8%	11.1%	$1.36	4.2%
Broccoli	NA	$291 M	6.8%	22.5%	135 M	11.5%	18.5%	$2.15	-4.2%

Although packaged salad is categorized separately from value-added vegetables, a quarterly evaluation of this important product's performance will be included in this section. Salad kits have benefitted from an increase in in-home family meal occasions, to the detriment of single serve salad bowls – especially those that can be found in the deli.



Q1 2019

Q1 2020



Salad Kit only type to increase dollar share

3.2 pts.

PACKAGED SALAD DOLLAR SHARE BY TYPE

Source: Nielsen Total Food View, Total U.S. xAOC, 13 Weeks Ending 3/28/20:, UPC-coded and random-weight/Non-UPC data; Nielsen Homescan
** Denotes categories reported in units instead of pounds, and average price per unit instead of average price per pound*

nielsen

Top 10 Fruit Trends

6 weeks ending 2-15-20 (P1) vs. 6 weeks ending 3-28-20 (P2)

To show how COVID-19 has impacted fresh produce purchasing, we are also including a comparison between the 1st half of the quarter and the 2nd half of the quarter.

Dollar sales have increased across the top 10 fruit categories in the second half of Q1. Lemons, Oranges, and Mandarins were the chart toppers with highest growth rates – likely due to their stable price and potentially also for their reputation for being a good source of vitamin C. Volume sales fell in Blueberries and Avocados where prices rose sharply, which led to dollar growth.

Average prices have seen a notable fall in Grapes and Strawberries, which are among the categories that saw highest volume growth.

Top Fruit Categories Q1 2020	Dollars P1	Dollars P2	% Change	Units/ Pounds P1	Units/ Pounds P2	% Change	Average Price per Pound/ Unit* P1	Average Price per Pound/ Unit* P2	% Change
Apples	$457 M	$506 M	10.8%	288 M	314 M	9.1%	$1.58	$1.61	1.6%
Bananas	$375 M	$414 M	10.3%	672 M	733 M	9.0%	$0.56	$0.57	1.3%
Grapes	$346 M	$373 M	7.8%	142 M	167 M	17.7%	$2.43	$2.23	-8.4%
Strawberries*	$330 M	$380 M	15.3%	96 M	122 M	26.8%	$3.43	$3.12	-9.0%
Avocados	$267 M	$305 M	14.2%	133 M	130 M	-2.3%	$2.01	$2.35	16.9%
Mandarins	$250 M	$303 M	21.4%	176 M	214 M	21.7%	$1.42	$1.42	-0.2%
Blueberries*	$208 M	$217 M	4.5%	65 M	55 M	-15.4%	$3.21	$3.96	23.4%
Oranges	$152 M	$190 M	24.3%	129 M	159 M	23.8%	$1.19	$1.19	0.5%
Raspberries*	$119 M	$135 M	13.8%	35 M	38 M	7.0%	$3.35	$3.56	6.4%
Lemons	$75 M	$96 M	27.9%	40 M	51 M	27.7%	$1.89	$1.90	0.2%

Source: Nielsen Total Food View, Total U.S. xAOC, 6 Weeks Ending 3/28/20 vs 6 Weeks Ending 2/15/20:, UPC-coded and random-weight/Non-UPC data;
** Denotes categories reported in units instead of pounds, and average price per unit instead of average price per pound*

Top 10 Vegetable Trends

6 weeks ending 2-15-20 (P1) vs. 6 weeks ending 3-28-20 (P2)

To show how COVID-19 has impacted fresh produce purchasing, we are also including a comparison between the 1st half of the quarter and the 2nd half of the quarter.

Dollar and volume sales have increased across top 10 vegetable categories in the second half of Q1.

Potatoes, Onions and Carrots were among the most affordable vegetable categories and have also seen the highest growth – many of the high growth categories are cooking staples, and potatoes specifically are often considered a comfort food, which is a genre that generally has seen an uptick due to COVID-19.

Average prices have seen a modest decline in Broccoli, Bell Peppers, Onions, Lettuce and Carrots.

Top Vegetable Categories Q1 2020	Dollars P1	Dollars P2	% Change	Units/ Pounds P1	Units/ Pounds P2	% Change	Average Price per Pound/ Unit* P1	Average Price per Pound/ Unit* P2	% Change
Pre packaged salads*	$608 M	$662 M	8.9%	215 M	230 M	7.2%	$2.83	$2.88	1.5%
Potatoes	$406 M	$560 M	37.7%	512 M	680 M	32.8%	$0.79	$0.82	3.8%
Tomatoes	$444 M	$509 M	14.7%	195 M	222 M	13.6%	$2.27	$2.30	1.0%
Onions	$257 M	$309 M	20.6%	220 M	271 M	23.0%	$1.17	$1.14	-1.9%
Bell Peppers	$214 M	$235 M	10.0%	86 M	96 M	12.4%	$2.50	$2.44	-2.1%
Lettuce	$200 M	$213 M	6.6%	110 M	118 M	7.7%	$1.82	$1.80	-1.0%
Carrots	$164 M	$189 M	15.0%	130 M	151 M	16.1%	$1.26	$1.25	-1.0%
Mushrooms	$147 M	$163 M	10.8%	34 M	36 M	6.6%	$4.33	$4.50	4.0%
Cucumbers	$131 M	$144 M	10.0%	98 M	103 M	5.5%	$1.34	$1.40	4.3%
Broccoli	$136 M	$142 M	4.0%	62 M	67 M	7.7%	$2.19	$2.12	-3.4%

Source: Nielsen Total Food View, Total U.S. xAOC, 6 Weeks Ending 3/28/20 vs 6 Weeks Ending 2/15/20:, UPC-coded and random-weight/Non-UPC data;
** Denotes categories reported in units instead of pounds, and average price per unit instead of average price per pound*

UNITED FRESH
PRODUCE ASSOCIATION

Category Spotlights

Q3 2019 vs. Q3 2018 and Q3 2017

As companies prepare for Q3 2020, this section looks back at Q3 2019 performance for perspective.

CANTALOUPE

Cantaloupe dollar sales continue the flat trend from previous year, growing just +0.1% during the past two years. Dollar sales reached $181 million in the third quarter of the past year, and volume sales stood at 195 million. While the value add sub category represents a pocket of growth, growth rates have moderated compared to the past.

Product	Dollars	% Change versus Q3 2018	% Change versus Q3 2017	Pounds	% Change versus Q3 2018	% Change versus Q3 2017	Average Price/lb	% Change versus Q3 2018
Total Cantaloupe	$181 M	0.1%	0.1%	195 M	-0.4%	-3.4%	$0.93	0.5%
Cantaloupe	$128	-2.0%	-4.1%	180 M	-0.5%	-4.0%	$0.71	-1.5%
Value Add	$53	5.7%	12.3%	15 M	1.1%	5.4%	$3.49	4.5%

CORN

Corn sales have continued the growth momentum over the past two years, though volume sales are still challenged to grow. Yellow and bi-Color are the leading sub categories, growing double digits and driving overall corn sales. Value add sales declined from a small base, after growing in the previous year.

Product	Dollars	% Change versus Q3 2018	% Change versus Q3 2017	Pounds	% Change versus Q3 2018	% Change versus Q3 2017	Average Price/lb	% Change versus Q3 2018
Total Corn	$244 M	8.0%	10.3%	338 M	1.3%	-0.6%	$0.72	6.6%
Yellow	$105 M	11.4%	-3.5%	192 M	2.3%	-2.5%	$0.55	9.0%
Bi-Color	$45 M	28.7%	29.4%	48 M	7.9%	12.3%	$0.93	19.3%
Remaining Corn	$44 M	-5.9%	27.1%	24 M	4.6%	-8.2%	$1.82	-10.0%
White	$36 M	1.4%	-5.5%	62 M	-4.8%	-13.0%	$0.59	6.5%
Value Add	$13 M	-3.2%	269.0%	11 M	-9.9%	407.8%	$1.12	7.4%

WATERMELON

Watermelon recorded sales of $698 million, continuing the growth momentum in the past two years. Volume growth has moderated from the previous year, indicating an inflationary growth. Seedless and value add sub categories that play to the convenience needs of consumers are driving sales and growth, while the seeded variant has seen dollar sales plummet -11.0%.

Product	Dollars	% Change versus Q3 2018	% Change versus Q3 2017	Pounds	% Change versus Q3 2018	% Change versus Q3 2017	Average Price/lb	% Change versus Q3 2018
Total Watermelons	$698 M	8.6%	11.0%	1,421 M	2.9%	9.2%	$0.49	5.6%
Seedless	$414 M	6.9%	8.5%	1,228 M	4.7%	12.6%	$0.34	2.1%
Value Add	$240 M	16.5%	22.4%	101 M	7.0%	14.6%	$2.37	9.0%
Seeded	$43 M	-11.0%	-13.9%	93 M	-18.3%	-25.1%	$0.47	8.8%

nielsen

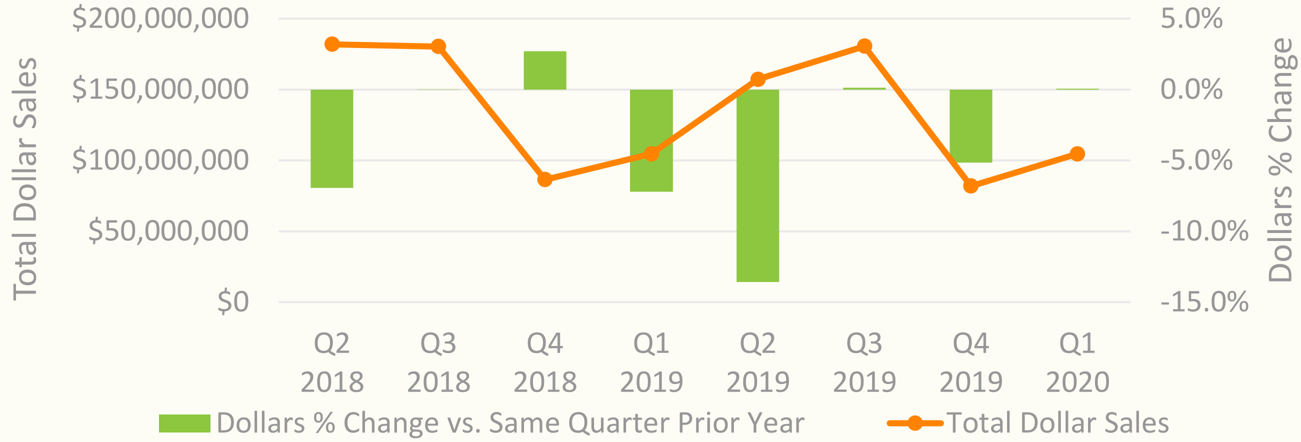
Source: Nielsen Total Food View, Total U.S. xAOC, 13 Weeks Ending 9/28/19:, UPC-coded and random-weight/Non-UPC data; Nielsen Homescan
** Denotes categories reported in units instead of pounds, and average price per unit instead of average price per pound*

Category Spotlights

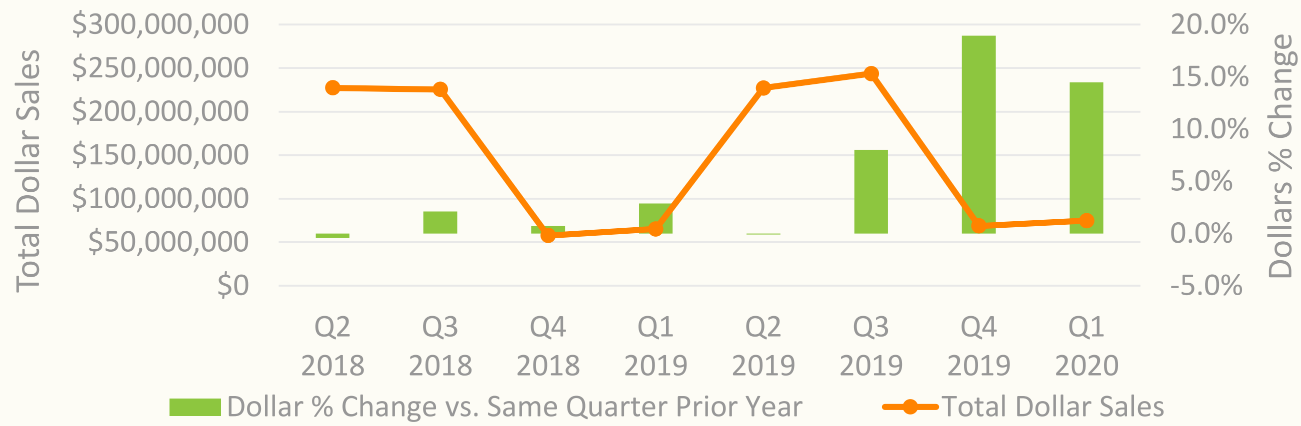
Q2 2018 to Q1 2020

In order to provide a view into longer-term trends, these charts show performance over the past eight quarters for the spotlight categories. All 3 categories are highly seasonal, with valleys in winter months.

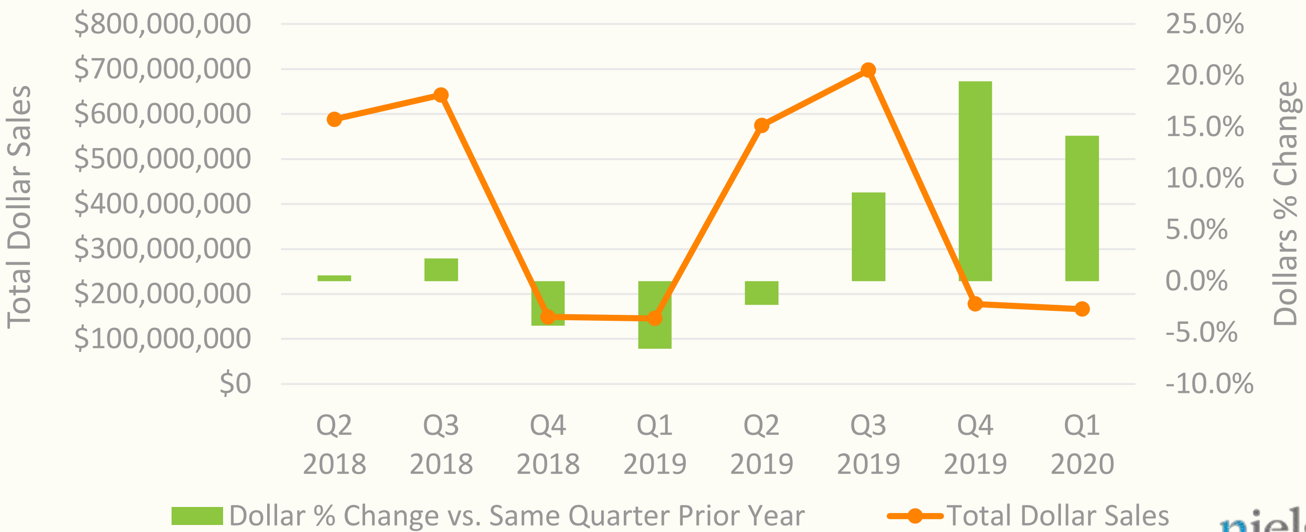
CANTALOUPE



CORN



WATERMELON



Source: Nielsen Total Food View, Total U.S. xAOC, Quarterly Period Ending 3/28/20, UPC-coded and random-weight/Non-UPC data

Value-Added Fruits & Vegetables

Q1 2020

VALUE-ADDED FRUITS AND VEGETABLES

Includes fruit/vegetable produce items that have undergone an extra process to enhance their marketability. This could include dicing, cutting, or mixing items for the purposes of snacking, easier meal preparation, or as a seasoned side dish.

Shopper spend on value-added vegetables continues to grow

Both vegetables and fruits have bolstered the sales of value-added produce. The snacking segment accounted for the bulk of sales and growth in fruits, while both Meal Prep and Snacking segments drove growth in Vegetables.

Average dollar buy rate for value-added fruits and vegetables went up by 20.6% and 11.1% respectively.

Mixed fruit and mixed vegetables are the top selling value add produce categories, while Watermelons, Carrots and Broccoli are growing revenues faster. Mixed fruits sales have declined relatively steeply the last few weeks of March, and meal prep fruit started decline in mid February, possibly reflecting consumer preference for products that have not been handled at additional human touchpoints. Mixed vegetables, on the other hand could be perceived as less risky as they are more likely to be cooked before consumption. Food safety and convenience will likely be a strong driver of consumer behavior.

Value-added Fruit and Vegetable	Dollars	% Change versus Q1 2019	Pounds	% Change versus Q1 2019	Average Retail Price	% Change versus Q1 2019
Fruit	**$558 M**	**1.0%**	**146 M**	**0.0%**	**$3.82**	**0.9%**
Snacking	$558 M	1.0%	146 M	0.0%	$3.82	1.0%
Meal Prep	$614 K	-12.5%	154 K	0.5%	$4.00	-13.0%
Vegetable	**$432 M**	**5.1%**	**142 M**	**7.0%**	**$3.04**	**-1.8%**
Meal Prep	$372 M	6.4%	120 M	8.8%	$3.11	-2.3%
Snacking	$48 M	-1.3%	20 M	-1.2%	$2.41	-0.0%

3.4%

Dollar contribution of value-added fruits to total produce

Top 10 Value-Added Categories of Produce	Dollars	% Change versus Q1 2019	Pounds	% Change versus Q1 2019	Average Retail Price	% Change versus Q1 2019
Mixed Fruit	$127 M	-5.1%	30 M	-3.3%	$4.22	-1.9%
Mixed Vegetables	$113 M	1.2%	29 M	-2.8%	$3.89	4.2%
Watermelons	$98 M	14.2%	34 M	3.7%	$2.92	10.1%
Pineapples	$96 M	-2.3%	25 M	-3.7%	$3.83	1.4%
Broccoli	$71 M	9.5%	25 M	8.2%	$2.88	1.3%
Carrots	$47 M	9.9%	20 M	7.1%	$2.32	2.7%
Cantaloupe	$41 M	-8.6%	11 M	-10.9%	$3.63	2.6%
Celery	$35 M	1.6%	19 M	28.3%	$1.80	-20.9%
Apples	$34 M	-6.5%	8 M	-8.7%	$4.22	2.5%
Squash	$28 M	1.2%	7 M	4.8%	$3.78	-3.4%

2.6%

Dollar contribution of value-added vegetables to total produce

Source: Nielsen Total Food View, Total U.S. xAOC, 13 Weeks Ending 3/28/20:, UPC-coded and random-weight/Non-UPC data; Nielsen Homescan

Quarterly Spotlight: Organic Produce

Q1 2020

Organic produce sales reach $1.6 billion in Q1

Organic produce dollar sales in the latest quarter reached $1.6 billion, a figure that is up 8.6% compared to this time last year. This represents 9.8% of all produce dollars in Q1 2020.

Organic Vegetables recorded sales of over $938 million, up 7.0%. Organic Fruits and Herbs/Spices have registered double digit growth rates. Although organic has been growing for quite some time, growth increase could be due to price decrease, and consumers being less discerning, just grateful for options in stock. Perceived immunity and nutritional value of organic may also play a role.

$1.6 BILLION

Organic produce sales in Q1 2020

8.6%

Organic Product	Dollars	% Change versus Q1 2019	Pounds	% Change versus Q1 2019	Average Retail Price	% Change versus Q1 2019
Vegetables	$938 M	7.0%	279 M	8.1%	$3.36	-1.0%
Fruit	$559 M	10.3%	255 M	15.1%	$2.19	-4.2%
Herbs/Spices	$81 M	14.4%	12 M	14.1%	$6.64	0.3%

Continue to increase organic supply

Packaged Salad continues to be the top selling organic produce commodity, with quarterly sales eclipsing $311 million. Rounding out the next slots are Apples ($127 million) and Carrots ($105 million). With exception of Lettuce and Strawberries which saw declining to modest growth, other top organic produce categories sales have soared notably.

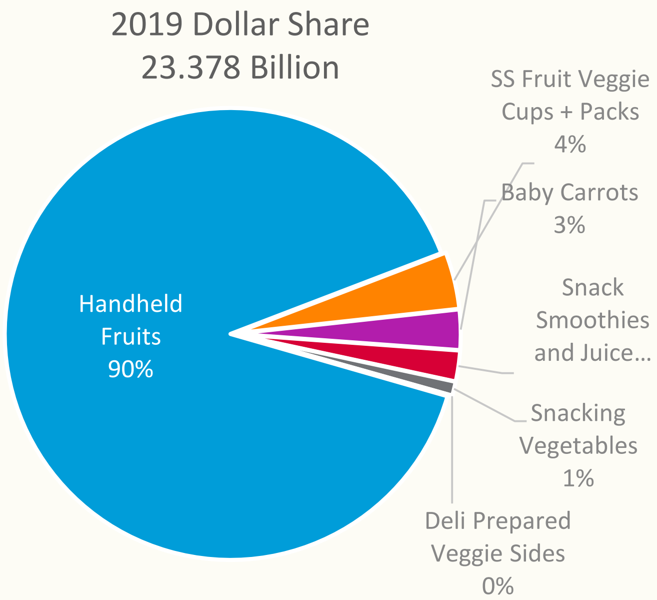
Top 10 Organic Products in Produce	$ Shr of Organic	$ Shr of Organic Chg vs YA	Dollars	% Change versus Q1 2019	Pounds/Units*	% Change versus Q1 2019	Average Retail Price per Pound/Unit*	% Change versus Q1 2019
Pre Packaged Salads*	22.8%	-1.0	$311 M	4.5%	80 M	4.8%	$3.87	-0.2%
Apples	12.4%	0.8	$127 M	11.0%	63 M	20.3%	$2.03	-7.7%
Carrots	27.7%	0.9	$105 M	10.2%	67 M	9.2%	$1.57	0.9%
Blueberries*	20.1%	1.3	$91 M	11.6%	22 M	12.5%	$4.11	-0.8%
Bananas	9.8%	1.0	$83 M	17.1%	112 M	19.5%	$0.74	-2.0%
Herbs & Spices	32.5%	1.5	$79 M	14.2%	12 M	14.0%	$6.72	0.2%
Strawberries*	9.2%	-0.8	$70 M	2.8%	12 M	-1.1%	$5.84	3.9%
Lettuce	14.1%	-0.7	$63 M	-1.0%	17 M	4.1%	$3.67	-4.8%
Tomatoes	5.4%	-0.2	$55 M	9.3%	13 M	2.4%	$4.12	6.7%
Potatoes	4.4%	-0.3	$45 M	10.5%	29 M	6.1%	$1.55	4.1%

Source: Nielsen Total Food View, Total U.S. xAOC, 13 Weeks Ending 3/28/20:, UPC-coded and random-weight/Non-UPC data; Nielsen Homescan
** Denotes categories reported in units instead of pounds, and average price per unit instead of average price per pound*

SPOTLIGHT ON SNACKING

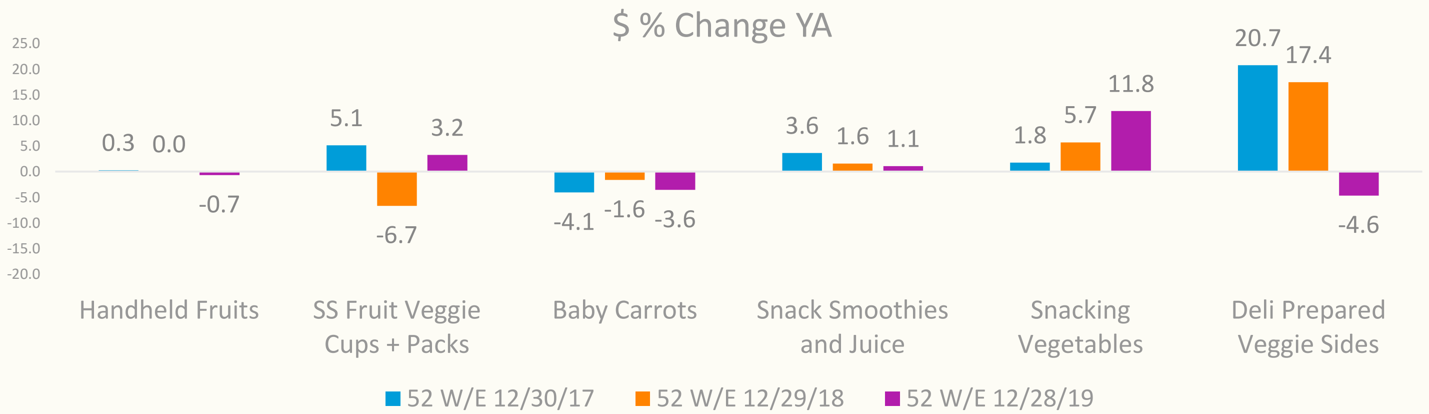
Fresh Snacking Ruled by Handheld Fruits

Fresh Snacking amounts to 23 Billion in sales (0.5% chg vs YA), 92% HHP, with average annual spend 77.58 (-$0.78 CYA) and average spend per trip $5.36 (-$0.05 CYA). House holds with Children, Female head of household under age 44, college graduates, Asian, and income of 100K+ spend more on Fresh Snacking than the average household.



Snacking Vegetables Increase Steadily

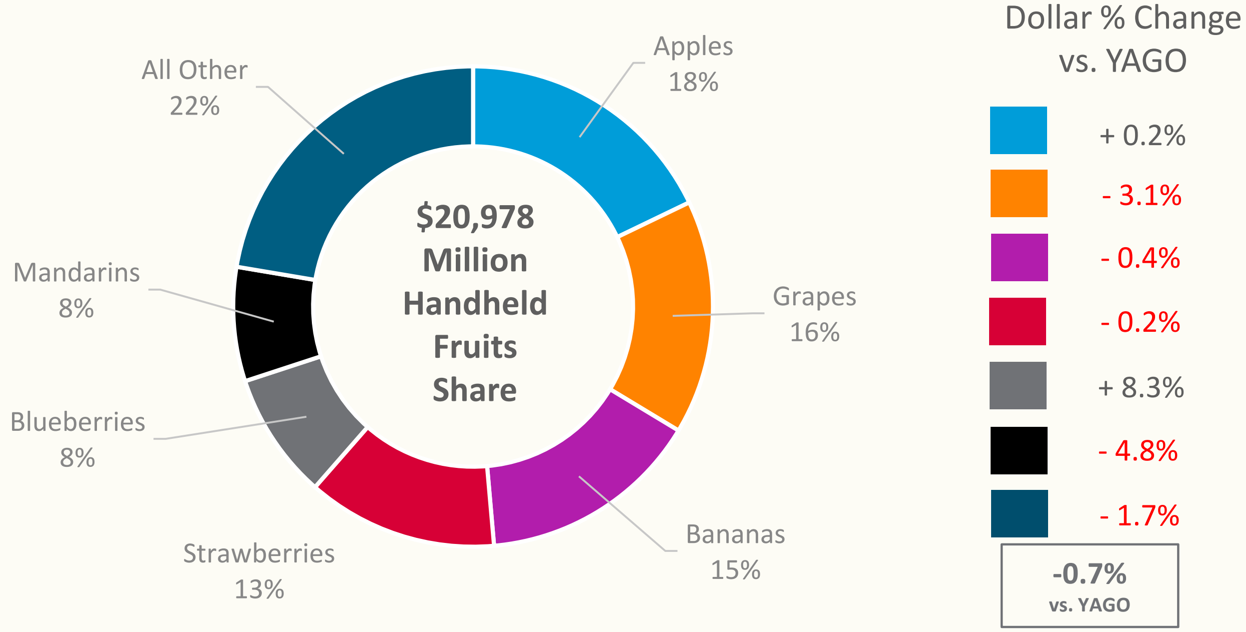
Handheld fruits remain fairly steady, maintaining their share.



SPOTLIGHT ON SNACKING

Apples, Grapes, and Bananas Account for 50% of Handheld Fruit $

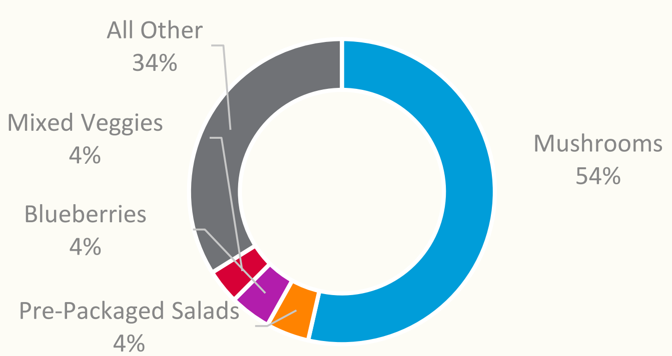
Apples and Blueberries help offset declines in other categories. 29% growth for Private Label handheld fruits.



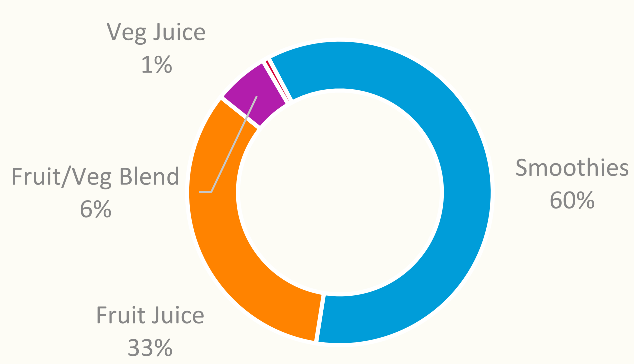
Mixed Veggies Showing Double Digit Growth in Cups/Packs

43% of SS Fruit/Veggie Cups & Packs is Private Label. Mushrooms and Smoothies play a significant role in their segments.

$956 Million
SS Fruit Veggie Cups & Packs Share



$516 Million
Snack Smoothies & Juice Share



Total	Mushrooms	Pre Packaged Salad	Blueberries	Mixed Veggies	Dollar % Chg vs Year Ago	Total	Smoothies	Fruit Juice	Fruit/Veg Blend	Vegetable Juice
+3.2%	+1.7%	+7.9%	-23.5%	+48.4%		+1.1%	+2.0%	+0.6%	-6.2%	+8.6%

Fresh at Retail

Whole and Fresh Cut Produce Trends: 2020

United Fresh Produce Association brings together companies across every segment of the fresh produce supply chain, including growers, shippers, fresh-cut processors, wholesalers, distributors, retailers, foodservice operators, industry suppliers and allied associations. We empower industry leaders to shape sound government policy. We deliver the resources and expertise companies need to succeed in managing complex business and technical issues. We provide the training and development individuals need to advance their careers in produce. And, through these endeavors, we unite our industry with a common purpose – to build long-term value for our members and grow produce consumption. For more information, visit www.unitedfresh.org.

Del Monte Fresh Produce offers retailers and foodservice operators an array of innovative solutions to address the changing tastes and lifestyle needs of today's consumers. Our extensive distribution network allows just-in-time deliveries of our premium quality fresh products to your doorstep.

For more information call 800-950-3683 or visit our website at www.freshdelmonte.com

Nielsen Fresh is the industry expert in fresh food consulting, offering a full spectrum of solutions for the complete fresh food marketplace as well as consumer and category understanding.

The sales data for **Fresh at Retail** is a combination of scan and consumer behavior data provided by Nielsen. Data is for the xAOC Total Food View which includes key retailers from food, mass/supercenter and club chains. The point-of-sale data is aggregated from a store, item, weekly level, and includes all produce items sold by UPC (standard supplier-assigned bar code), random-weight (price per pound) and system 2 (non-standard retailer-assigned bar code).

The consumer behavior and generational data is primarily sourced from Nielsen's Homescan Total Shopper View specialty consumer panel. More than 60,000 U.S. households report all transactions across all food buying retail outlets including both UPC items and 164 non-UPC random-weight products.

For questions, ideas or to learn more about available data and insights, including a new discount for syndicated reporting for United Fresh members, please contact us at mike.galaburda@nielsen.com