



Mango Category Performance 2019

March 17, 2020



KEY METRICS

2019 Key Metrics

WHOLE MANGO VOLUME VELOCITY

Volume Velocity up 2% YOY

WHOLE MANGO DOLLAR VELOCITY

Dollar Velocity up 8% YOY

CONTRIBUTION TO PRODUCE DEPT.

Volume 1%

Dollars .5%

AVERAGE RETAIL PRICE POINT

\$.94 each

↑ 6% over LY

Peak \$1.30 October

Low \$.77 July

FRUIT RANKING BASED ON VOLUME VELOCITY

Mango ranked 13th position

Bananas #1

Avocado #2

Apples #3

Grapes #4

Limes #5

FRUIT RANKING BASED ON SALES VELOCITY

Mango ranked 20th position

Apples #1

Grapes #2

Bananas #3

Strawberries #4

Avocados #5

FRESH CUT

Total Dollars

↑ 11% over LY

Dollar Velocity

↑ 13% over LY





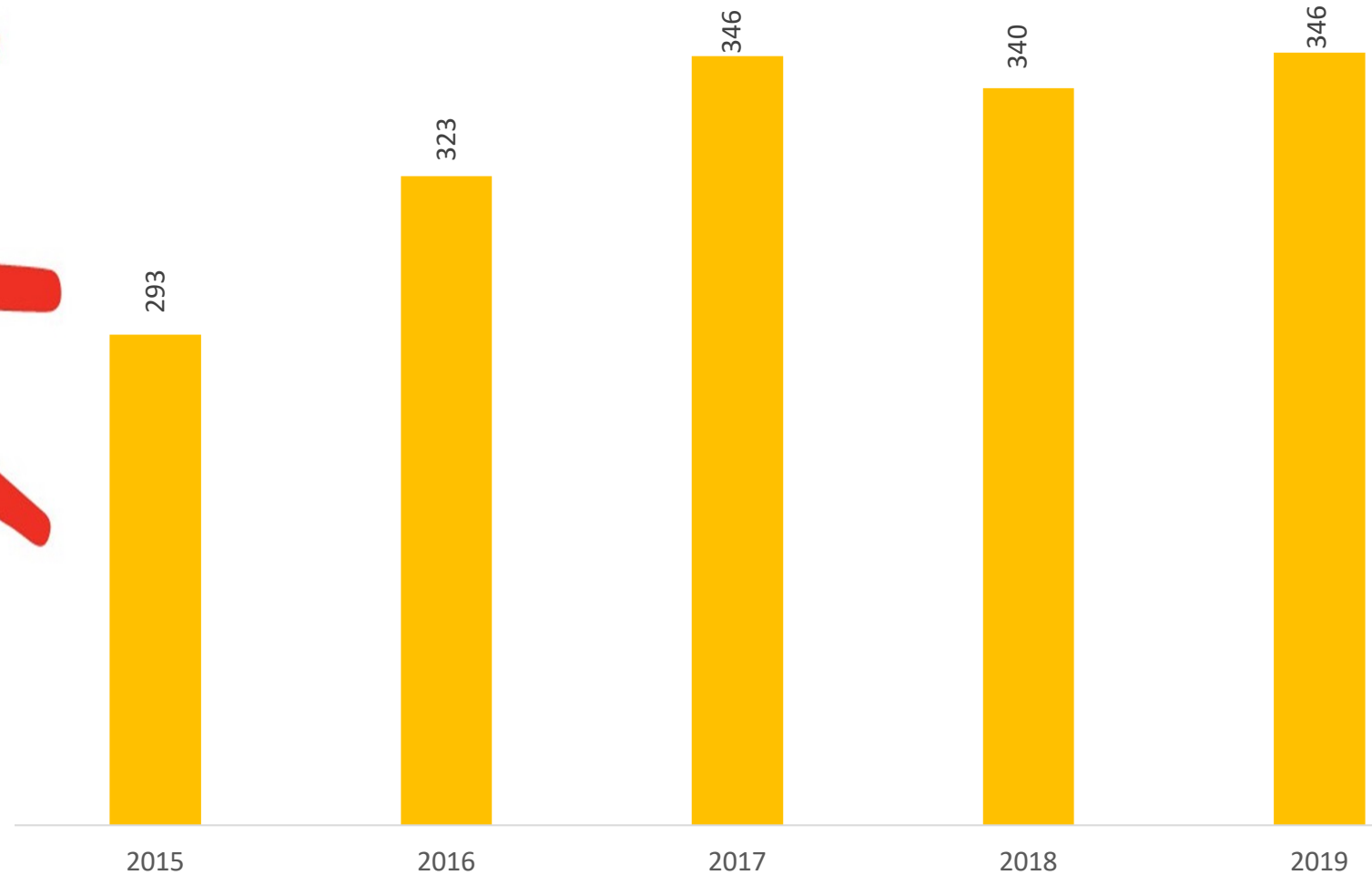
Whole Mango Performance



VOLUME

Annual Volume Comparison WHOLE MANGO

Mango volume
highest in five
years, tied 2017
at 346MM

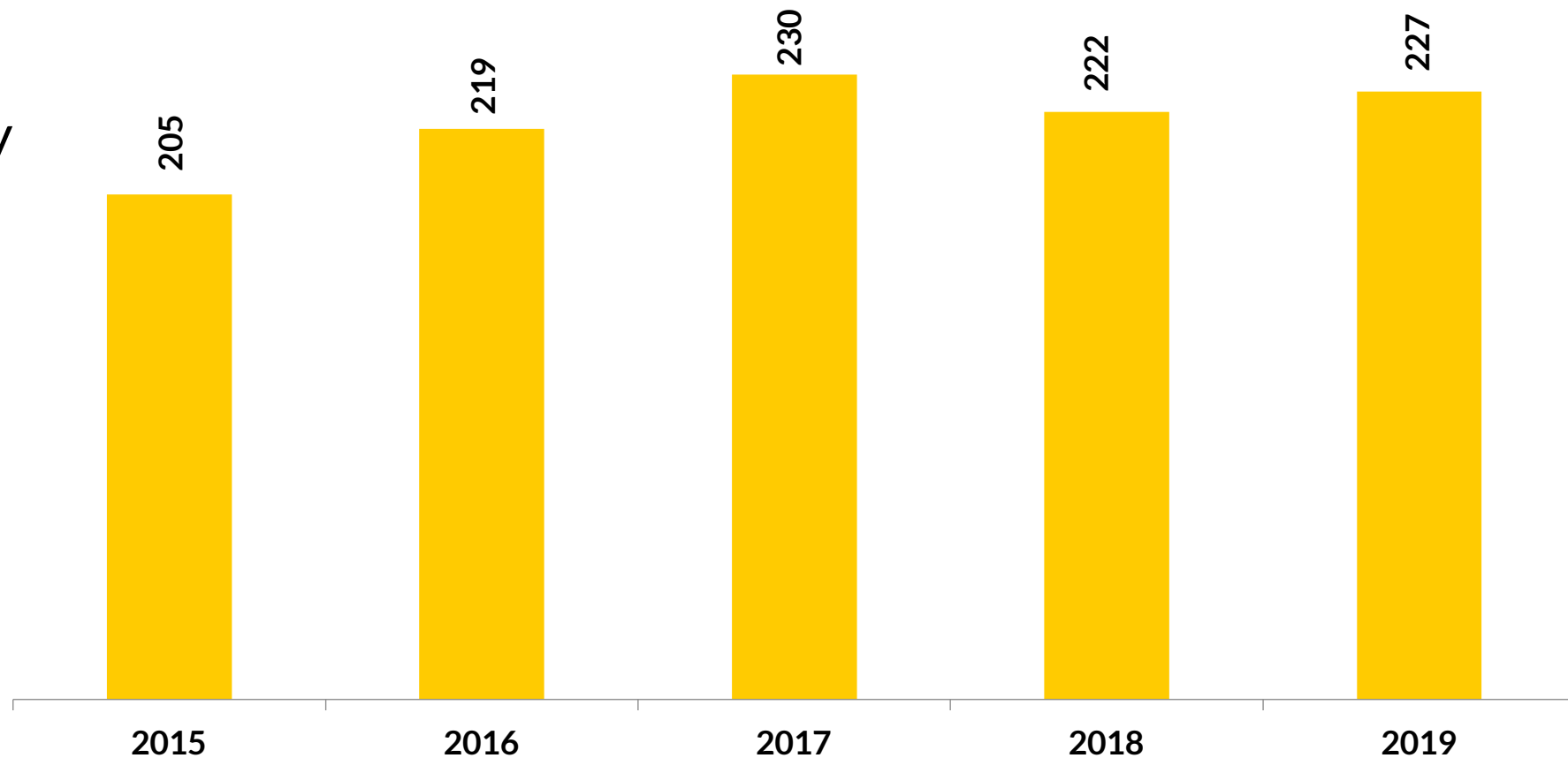


MANGOS
ARE MOVIN'
ON UP

Annual Volume Velocity Comparison Whole Mango

Annual volume velocity was up 2% versus last year.

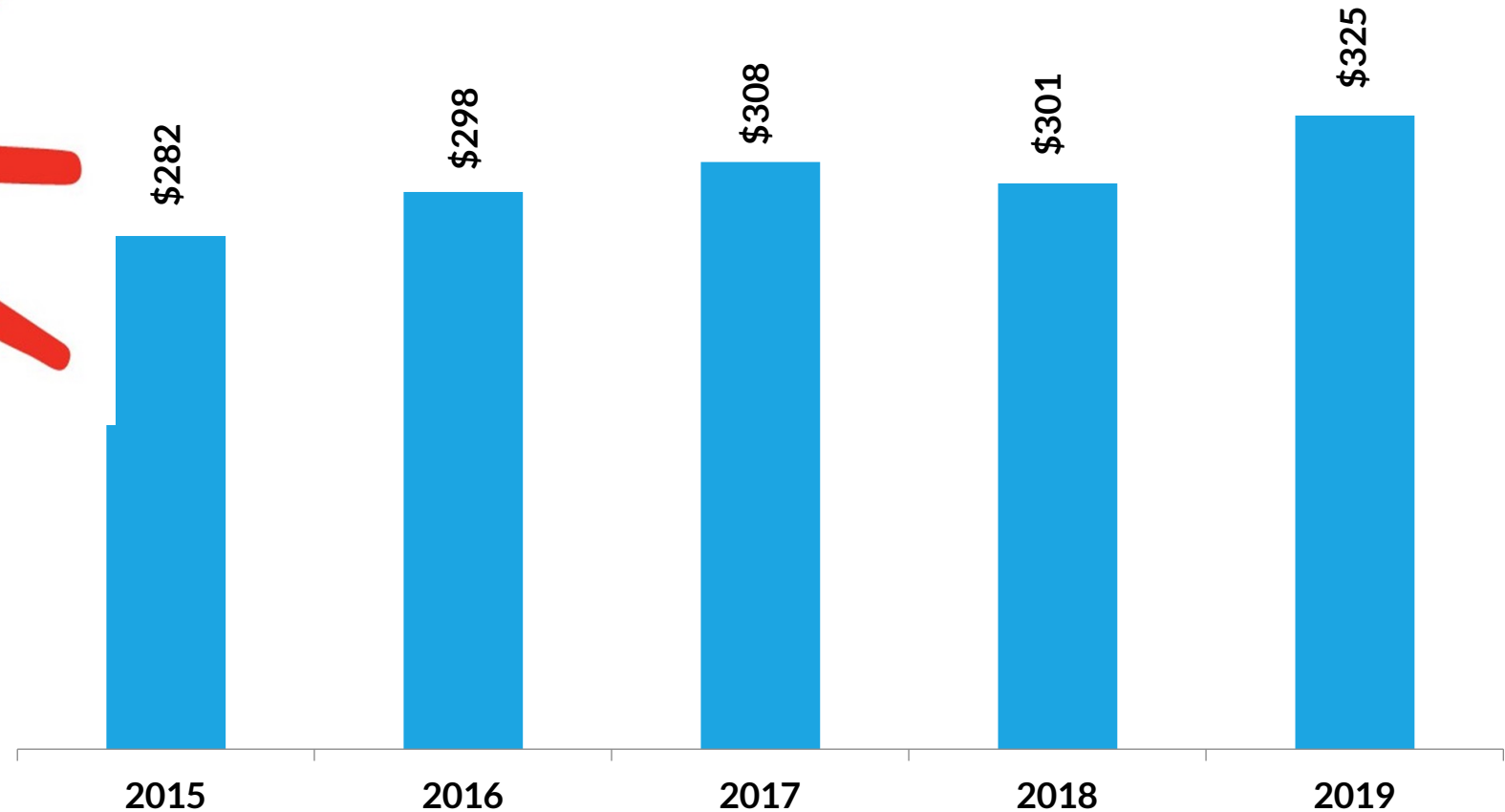
The five year high was in 2017.



DOLLARS

Annual Dollar Comparison Whole Mango

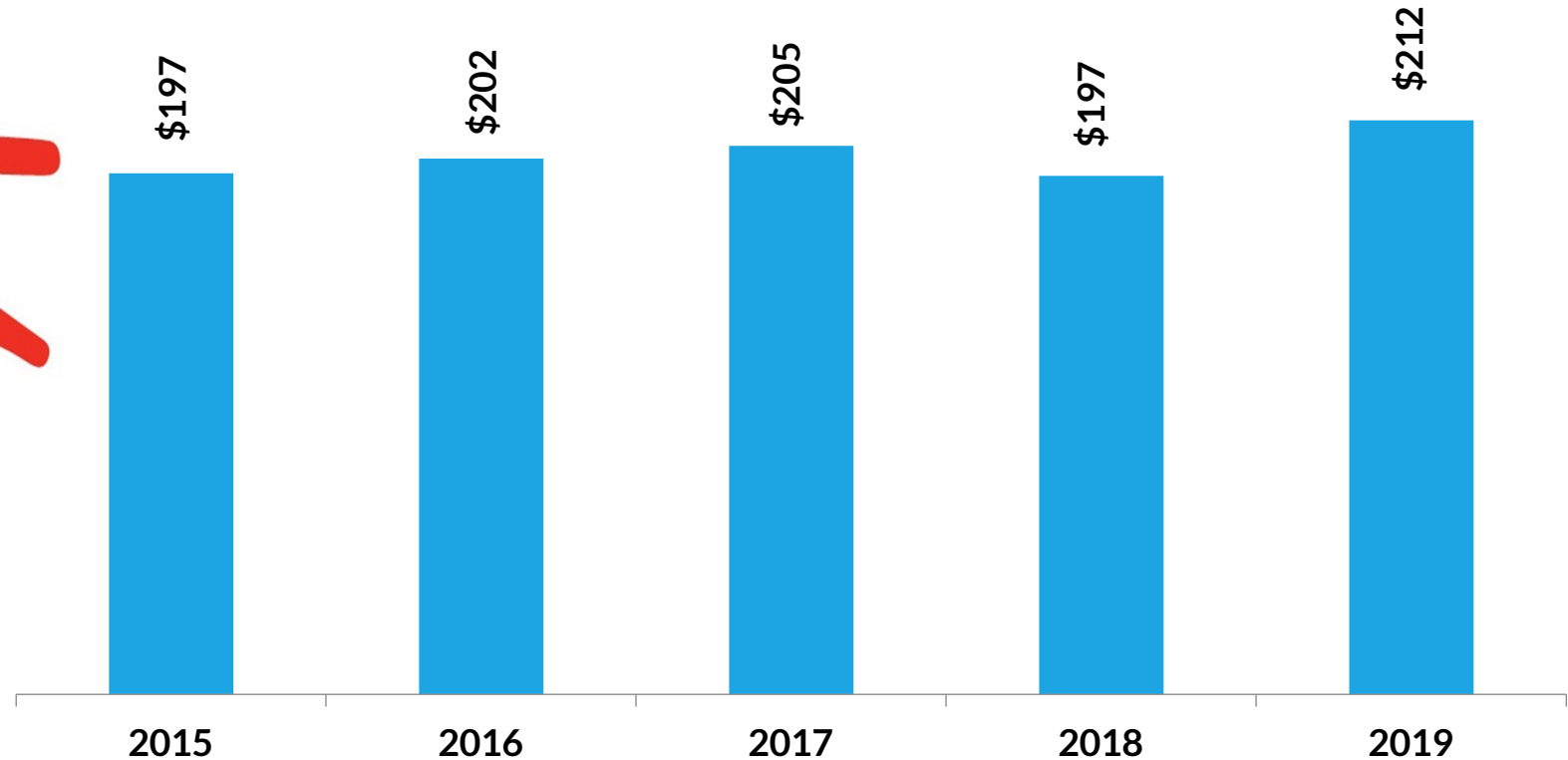
Mango dollars were
at a five year high,
\$325MM



DOLLARS

Annual Dollar Velocity Comparison Whole Mango

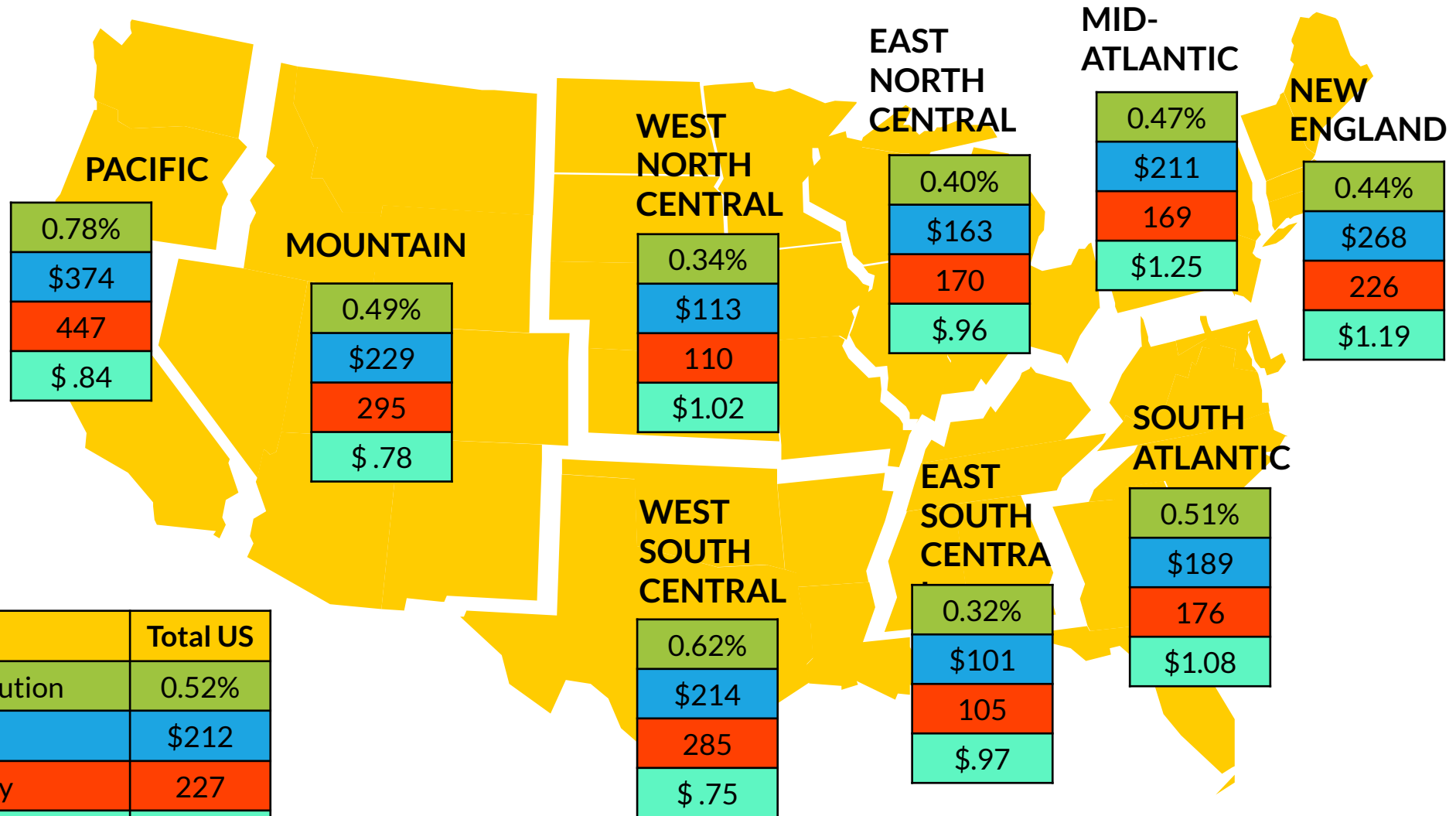
Mango dollar
velocity was at a
five year high,
\$212



MANGOS
ARE MOVIN'
ON UP

A large, thick yellow arrow pointing upwards, integrated into the word 'UP' in the phrase 'ON UP'. The arrow starts from the bottom of the 'U' and points towards the top right of the image.

2019 Performance By Region



Legend	Total US
Dollars Contribution	0.52%
Dollar Velocity	\$212
Volume Velocity	227
Average Retail Price	\$0.94

HOW DID WE DO THIS?



Consistent merchandising and placement messaging

Supply chain management training

Diminish the perception that mangos are seasonal

Twelve month strategy/execution plan

2020

2020 Whole Mangos

January Results

Total Volume and Volume Velocity up 15%

Avg Unit Price \$.98 down 8%

Total Dollars and Dollar Velocity up 6%

Contribution to Produce Dept .4%

February Results

Total Volume and Volume Velocity up 40%

Avg Unit Price \$1.02 down 18%

Total Dollars and Dollar Velocity up 16%

Contribution to Produce Dept .5%↑



Fruit Category Performance



WHOLE FRUIT RANKINGS BY VOLUME VELOCITY

Mangos remain at the 13th position

Fruit category notably decreased in volume velocity **-1.4%**

Mangos increased +1.9% in volume velocity and sustained the contribution to the produce department at 1%.

Whole Fruit Volume Velocity YOY Change & Contribution

	RANK	VOLUME/ STORE/WEEK	% CHANGE YOY	VOLUME CONTRIBUTION	% CHANGE YOY
FRUIT		9,052	-1.4%	49.8%	-0.5%
BANANAS	1	3,289	-0.6%	15.4%	-0.3%
AVOCADOS	2	1,056	-0.8%	4.8%	-0.1%
APPLES	3	954	-2.9%	4.5%	-0.2%
GRAPES	4	856	0.0%	4.0%	-0.1%
LIMES	5	784	8.9%	3.4%	0.3%
STRAWBERRIES	6	499	-6.3%	2.3%	-0.2%
LEMONS	7	463	1.0%	2.1%	0.0%
ORANGES	8	396	-0.1%	1.9%	0.0%
WATERMELONS	9	327	2.7%	1.3%	0.0%
BLUEBERRIES	10	313	9.7%	1.4%	0.1%
CHERRIES	11	295	-3.8%	0.6%	-0.1%
PEACHES	12	246	-2.7%	0.8%	-0.1%
MANGOS	13	227	1.9%	1.0%	0.0%
MANDARINS	14	191	-1.9%	1.0%	0.0%
RASPBERRIES	15	182	12.6%	0.7%	0.1%
PEARS	16	161	1.8%	0.7%	0.0%
CANTALOUPE	17	133	-12.5%	0.6%	-0.1%
BLACKBERRIES	18	128	4.3%	0.5%	0.0%
PAPAYAS	19	120	14.2%	0.3%	0.0%
NECTARINES	20	119	-3.5%	0.4%	0.0%
PINEAPPLES	21	104	-2.2%	0.5%	0.0%
KIWI	22	88	-1.3%	0.4%	0.0%
PLUMS	23	75	-1.4%	0.2%	0.0%
GRAPEFRUITS	24	70	-5.2%	0.3%	0.0%
POMEGRANATE	25	53	10.6%	0.1%	0.0%

WHOLE FRUIT RANKINGS BY DOLLAR VELOCITY

Mangos remain at the 20th position

Fruit category decreased in dollar velocity **-2.3%** and contribution to the produce department declined -1%.

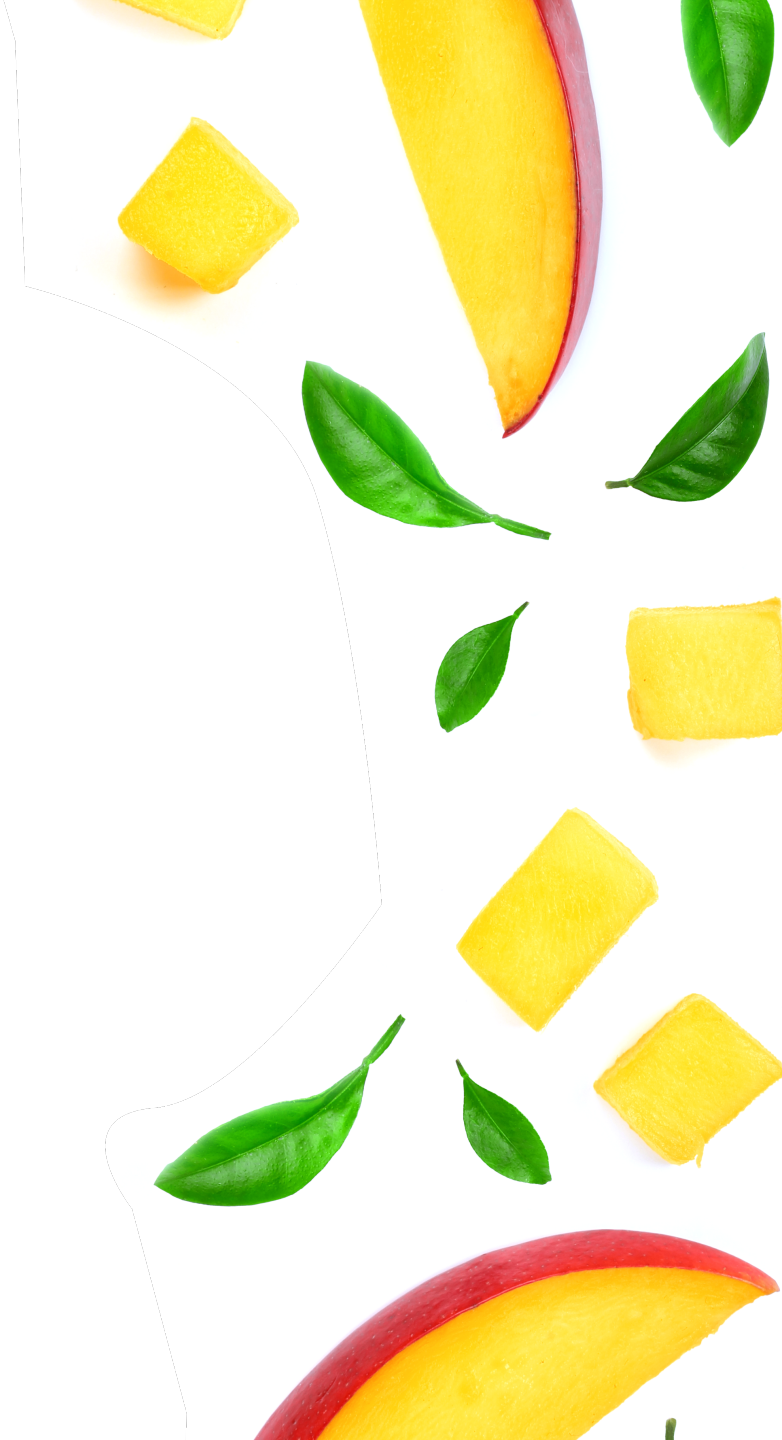
Mangos increased dollar velocity by 7.9% and sustained their contribution to the produce department at .5%.

Whole Fruit Dollar Velocity YOY Change & Contribution

	RANK	DOLLARS/ STORE/ WEEK	% CHANGE YOY	DOLLAR CONTRIBUTION	% CHANGE YOY
FRUIT		\$ 13,790	-2.3%	44.2%	-1.0%
APPLES	1	\$ 2,084	-0.9%	5.8%	-0.1%
GRAPES	2	\$ 1,949	-3.5%	5.3%	-0.3%
BANANAS	3	\$ 1,851	-1.1%	5.0%	-0.1%
STRAWBERRIES	4	\$ 1,587	-2.1%	4.3%	-0.1%
AVOCADOS	5	\$ 1,449	6.7%	3.8%	0.2%
BLUEBERRIES	6	\$ 1,098	5.7%	2.9%	0.1%
CHERRIES	7	\$ 951	-5.7%	1.2%	-0.1%
MANDARINS	8	\$ 856	-8.6%	2.5%	-0.2%
WATERMELONS	9	\$ 693	2.2%	1.6%	0.0%
RASPBERRIES	10	\$ 621	7.1%	1.5%	0.1%
ORANGES	11	\$ 596	-7.3%	1.6%	-0.2%
PEACHES	12	\$ 442	-4.1%	0.9%	-0.1%
LEMONS	13	\$ 421	-6.1%	1.1%	-0.1%
BLACKBERRIES	14	\$ 372	5.5%	0.9%	0.0%
LIMES	15	\$ 358	1.2%	0.9%	0.0%
PEARS	16	\$ 269	-1.2%	0.7%	0.0%
NECTARINES	17	\$ 243	-6.9%	0.4%	-0.1%
CANTALOUPE	18	\$ 224	-8.9%	0.6%	-0.1%
PINEAPPLES	19	\$ 216	0.3%	0.6%	0.0%
MANGOS	20	\$ 212	7.9%	0.5%	0.0%
PLUMS	21	\$ 164	-0.3%	0.3%	0.0%
DIPPED FRUIT	22	\$ 145	4.8%	0.1%	0.0%
PAPAYAS	23	\$ 136	3.8%	0.2%	0.0%
GRAPEFRUITS	24	\$ 121	-7.2%	0.3%	0.0%
POMEGRANATE	25	\$ 114	10.5%	0.1%	0.0%



Fresh Cut Performance



FRESH CUT RANKINGS BY DOLLAR VELOCITY

Fresh cut fruit dollar velocity was up 2.5% versus prior year.

Fresh cut mango dollar velocity was up **12.7% YOY** – far exceeding the category.

By dollar velocity, fresh cut mango was in both the 12TH (Mango Mix) the 14TH (Mango only) positions.

Fresh Cut Fruit Dollar Velocity and Contribution

	RANK	DOLLARS/ STORE/WEEK	% CHANGE YOY	DOLLAR CONTRIBUTION TO TOTAL FRUIT CUT	% CHANGE YOY
Fresh Cut Fruit		\$1,515	2.5%	100%	
Watermelon	1	\$ 496	10.2%	24.2%	1.5%
Mixed Fruit	2	\$ 300	-2.0%	21.4%	-0.7%
Pineapple	3	\$ 283	2.5%	15.3%	0.2%
Other Cut Fruit	4	\$ 211	-4.9%	2.3%	-0.2%
Fruit Cocktail	5	\$ 190	32.6%	0.1%	0.0%
Specialty Melons	6	\$ 169	-4.7%	2.6%	-0.1%
Cantaloupe	7	\$ 158	-1.4%	7.0%	-0.3%
Remaining					
Berries	8	\$ 140	50.0%	0.2%	0.0%
Fruit Salad	9	\$ 131	-8.5%	4.6%	-0.2%
Apples	10	\$ 129	0.8%	5.5%	-0.1%
Mixed Berries	11	\$ 104	-6.5%	2.9%	-0.3%
Mango Mix	12	\$ 95	0.4%	1.4%	0.1%
Strawberries	13	\$ 89	6.1%	1.6%	0.0%
Mango Only	14	\$ 83	12.7%	3.1%	0.2%
Tropical Fruit Mix	15	\$ 67	-14.6%	0.9%	0.0%

FRESH CUT RANKINGS BY TOTAL DOLLARS

Mangos are NOW #7

Fresh cut fruit sales were flat versus prior year.

Fresh cut mango sales were up 10.5% YOY at \$79.6MM.

Fresh cut mango ranked #7 in total sales for the fresh cut fruit category, up one spot from 2018.

Mango Mix was also up one stop to #13.

Fresh Cut Fruit Total Dollars and Contribution

	RANK	DOLLARS	% CHANGE VS YAGO	DOLLAR CONTRIBUTION TO TOTAL FRUIT CUT	% CHANGE VS YAGO
Fresh Cut Fruit		\$2,559,405,201	0.0%	100.0%	
Watermelon	1	\$ 618,188,765	9.1%	24.2%	1.5%
Mixed Fruit	2	\$ 547,532,141	-0.6%	21.4%	-0.7%
Pineapple	3	\$ 391,703,554	4.0%	15.3%	0.2%
Cantaloupe	4	\$ 180,213,860	-2.1%	7.0%	-0.3%
Apples	5	\$ 140,327,735	0.0%	5.5%	-0.1%
Fruit Salad	6	\$ 116,730,855	0.0%	4.6%	-0.2%
Mango Only	7	\$ 79,629,279	10.5%	3.1%	0.2%
Mixed Berries	8	\$ 74,113,953	-7.8%	2.9%	-0.3%
Specialty Melons	9	\$ 67,463,692	-2.9%	2.6%	-0.1%
Grapefruit	10	\$ 63,609,286	9.3%	2.5%	0.2%
Other Cut Fruit	11	\$ 60,129,389	-4.5%	2.3%	-0.2%
Strawberries	12	\$ 40,003,947	1.5%	1.6%	0.0%
Mango Mix	13	\$ 35,716,609	0.1%	1.4%	0.1%
Honeydew	14	\$ 30,754,952	-10.8%	1.2%	-0.2%
Pomegranate	15	\$ 29,708,393	-5.8%	1.2%	-0.1%

HOW DID WE DO THIS?



Educate retailers and processors on improving the quality of the product

Incorporate Fresh Cut throughout the perimeter of the store

Utilize voice of the Retail Dietitians to promote healthy alternatives

2020

2020 Fresh Cut Mangos

January Results

Total Volume flat 2%
Volume Velocity down 3%

Avg Unit Price \$4.65 up 2.5%

February Results

Total Volume flat -.4%
Volume Velocity down 6%

Avg Unit Price \$4.64 flat



Total Dollars flat +.4%
Dollar Velocity down - 5.5%

Contribution to Produce Dept .1%

Total Dollars flat -.2%
Dollar Velocity down - 5.5%

Contribution to Produce Dept .1%

MANGOS
ARE MOVIN'
ON UP



Stores on Ad



EXECUTIVE SUMMARY

OVERVIEW

Total stores on ad for 2019 was 346,000

6% decrease of stores on ad YOY for 2019

Average of 6,600 stores on ad per week
Q4 2018/Q1 2019 = 135,000

Strategic Goals by 2020

416,000 total	8,000/week
Q4/Q1 totals	176,000



This report is intended to be directional. There is one omission to the data to note:
No retail data was captured by USDA week ending March 10, 2018. Numbers for same week 2019 are NOT included for equity in comparison.



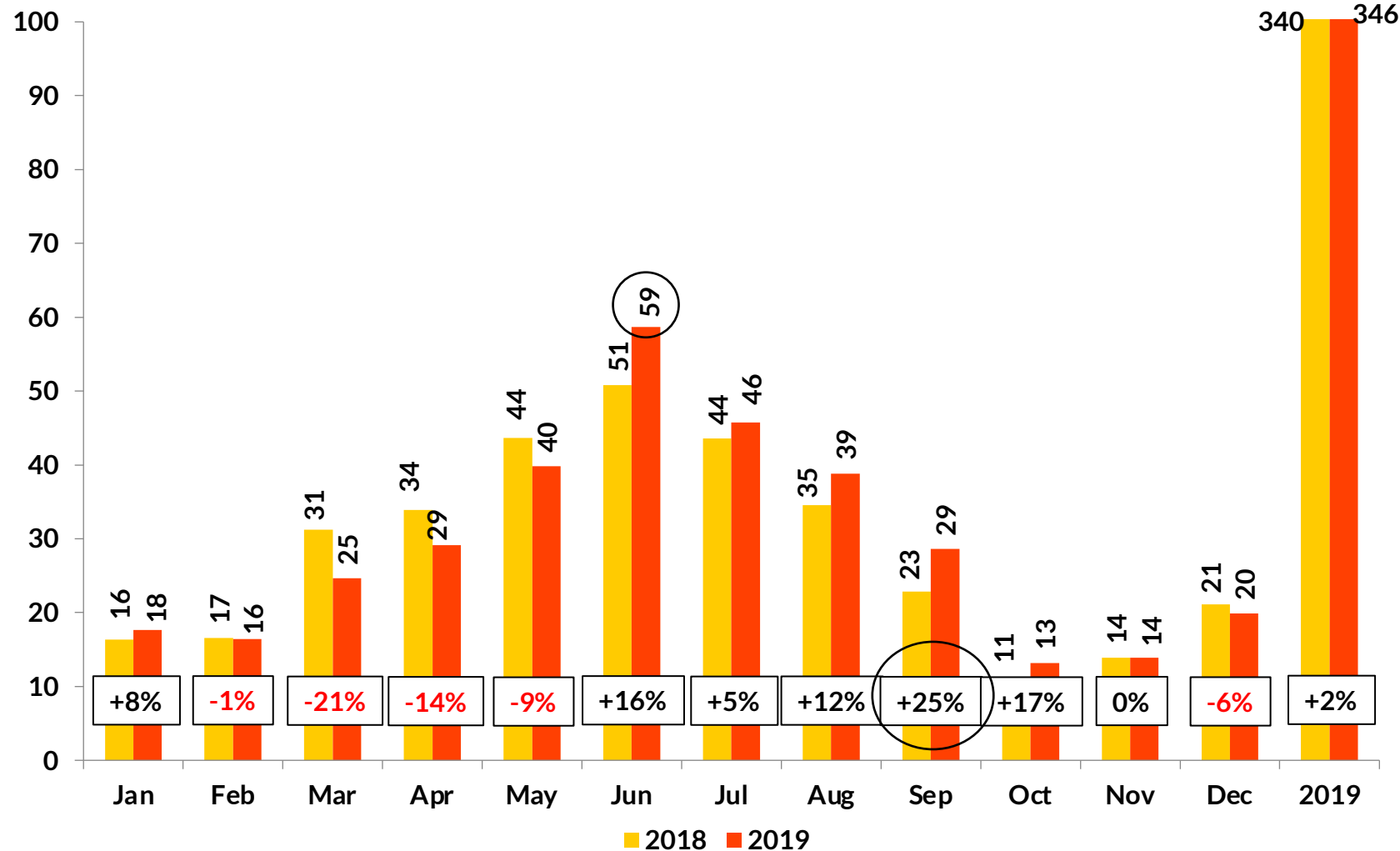
Monthly Volume Millions Whole Mango

2019 total volume was up 2.%
at 346.

There were five consecutive
months (June-Oct) with YOY
volume growth.

June had most total volume at
59MM.

The largest increase in total
volume was in September, +25%.

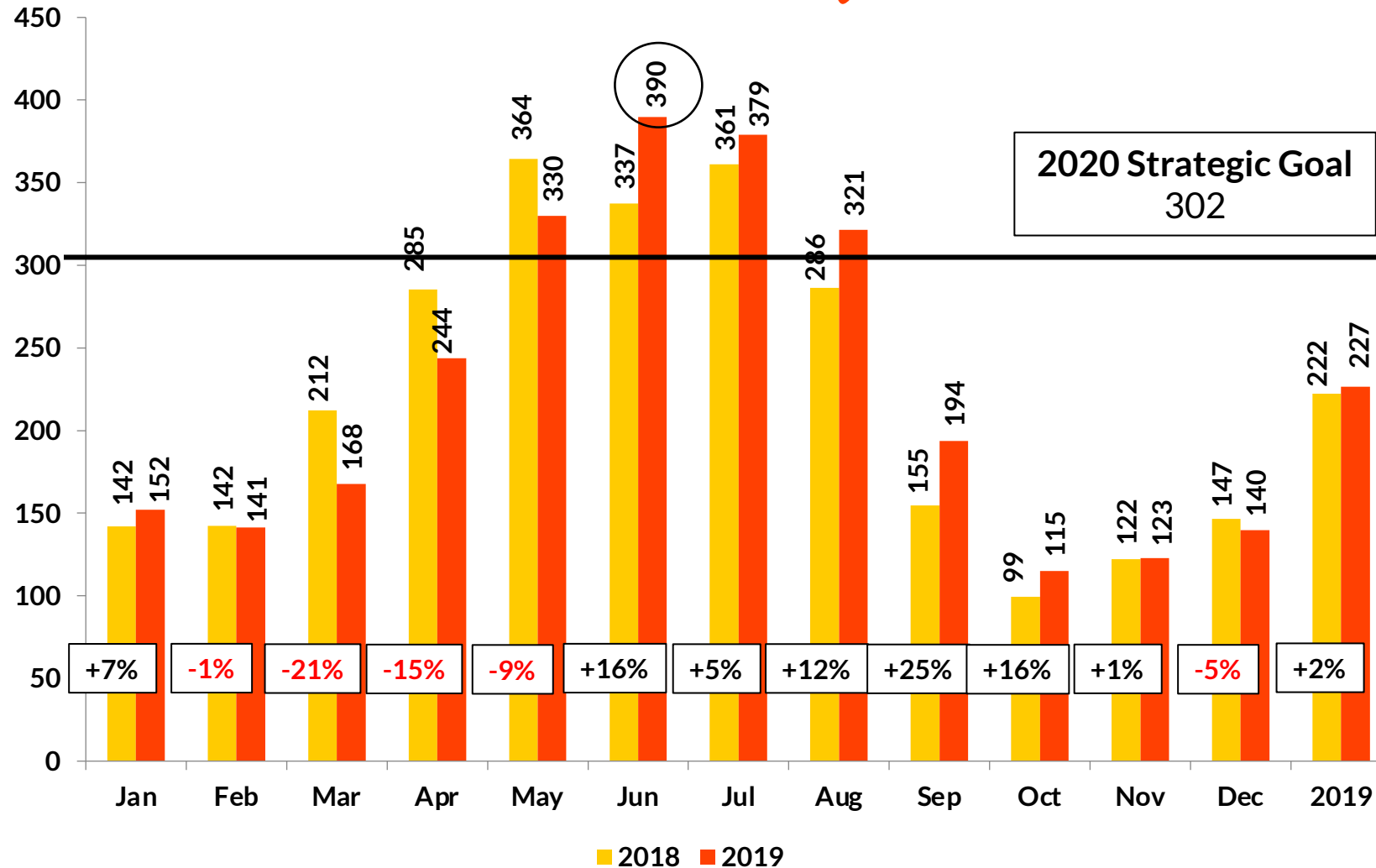


Monthly Volume Velocity Whole Mango

Year end volume velocity was up +2% at 227MM.

June had the highest volume velocity with 390/store/week.

2020 Strategic Goal
302 mangos/store/week



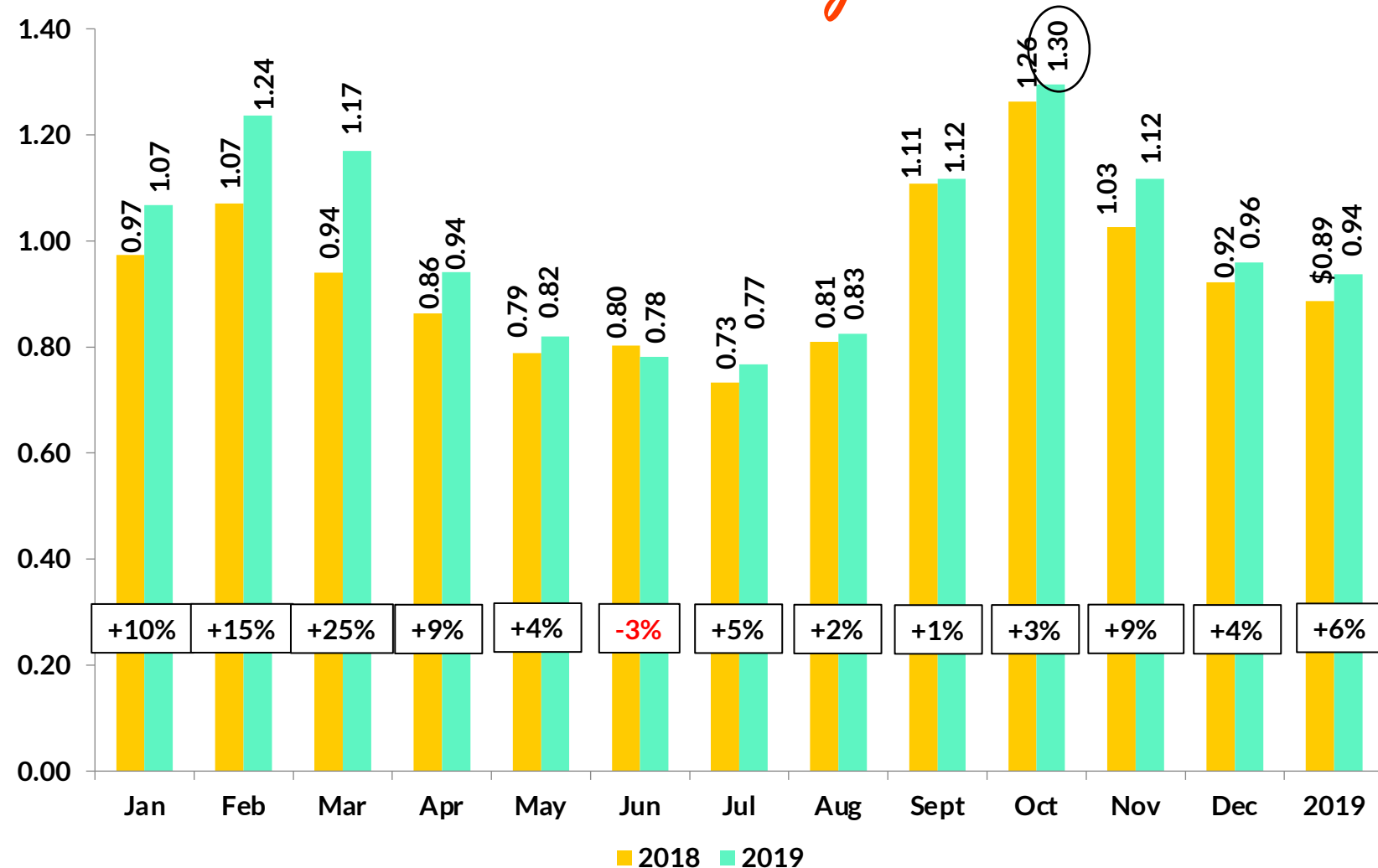
2019
AVERAGE
UNIT PRICE

The average unit price in 2019 was \$.94.

The lowest average unit price was in June and July at \$.78 and \$.77 respectively.

The highest average unit price was in October at \$1.30.

Monthly Average Unit Price Whole Mango



2019
DOLLARS

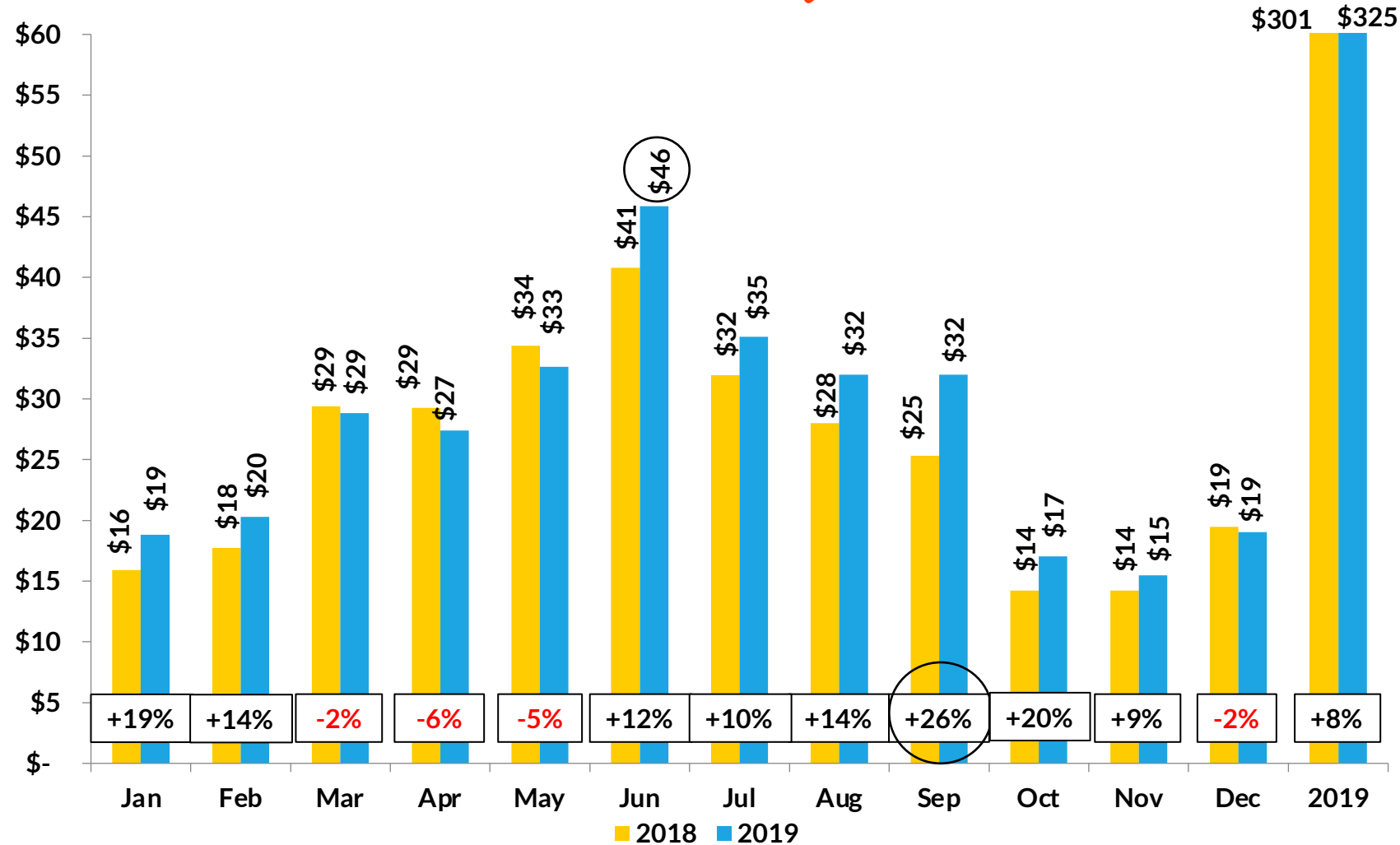
Total Dollar Millions Whole Mango

Year end total dollars were up 8.% at \$325MM

There were five consecutive months of double digit growth (June-October).

September (+26%) had the largest increase in dollars.

June had most total dollars with \$46MM.



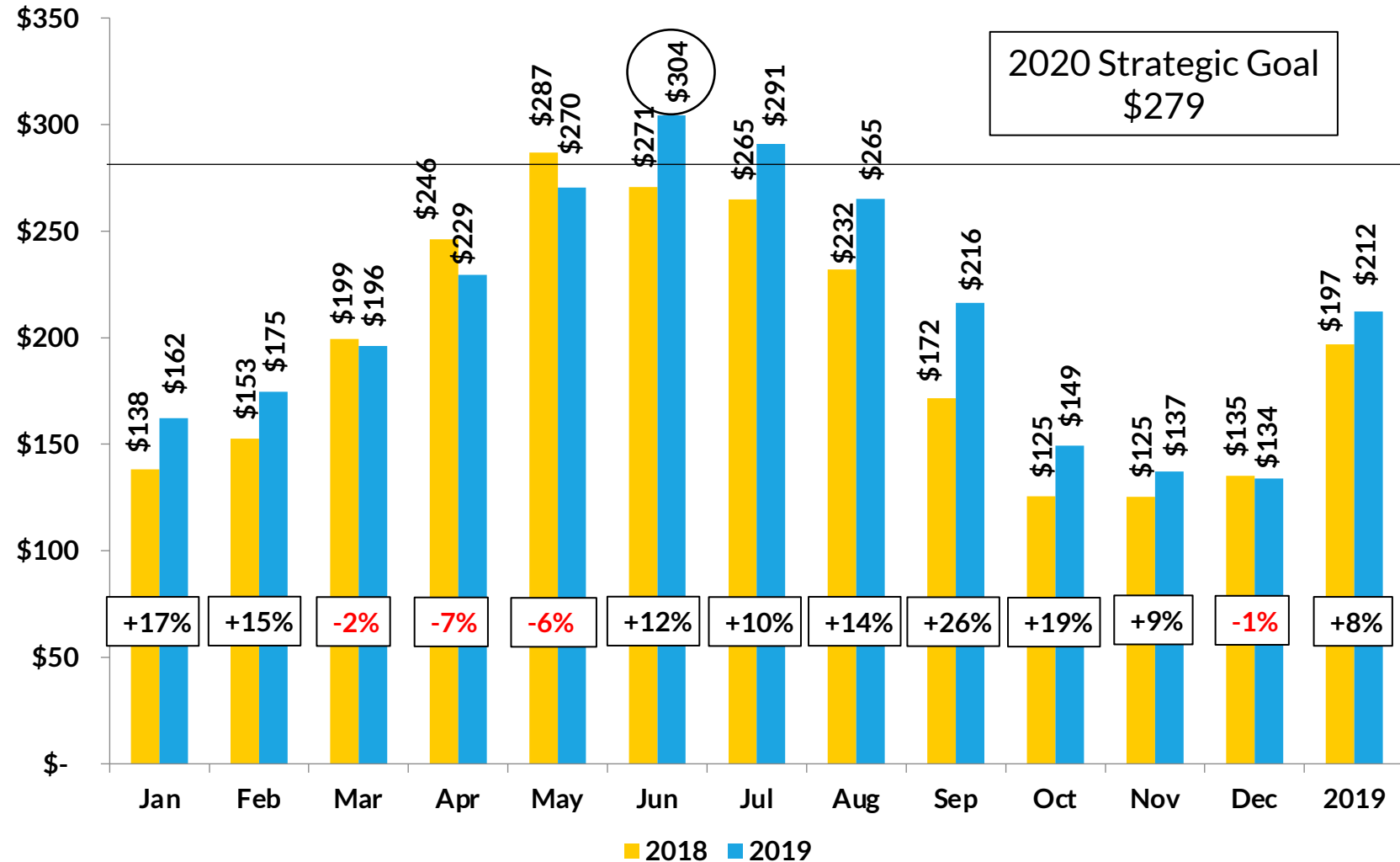
2019
DOLLARS

Monthly Dollar Velocity Whole Mango

2019 dollar velocity was up +8%
at \$212.

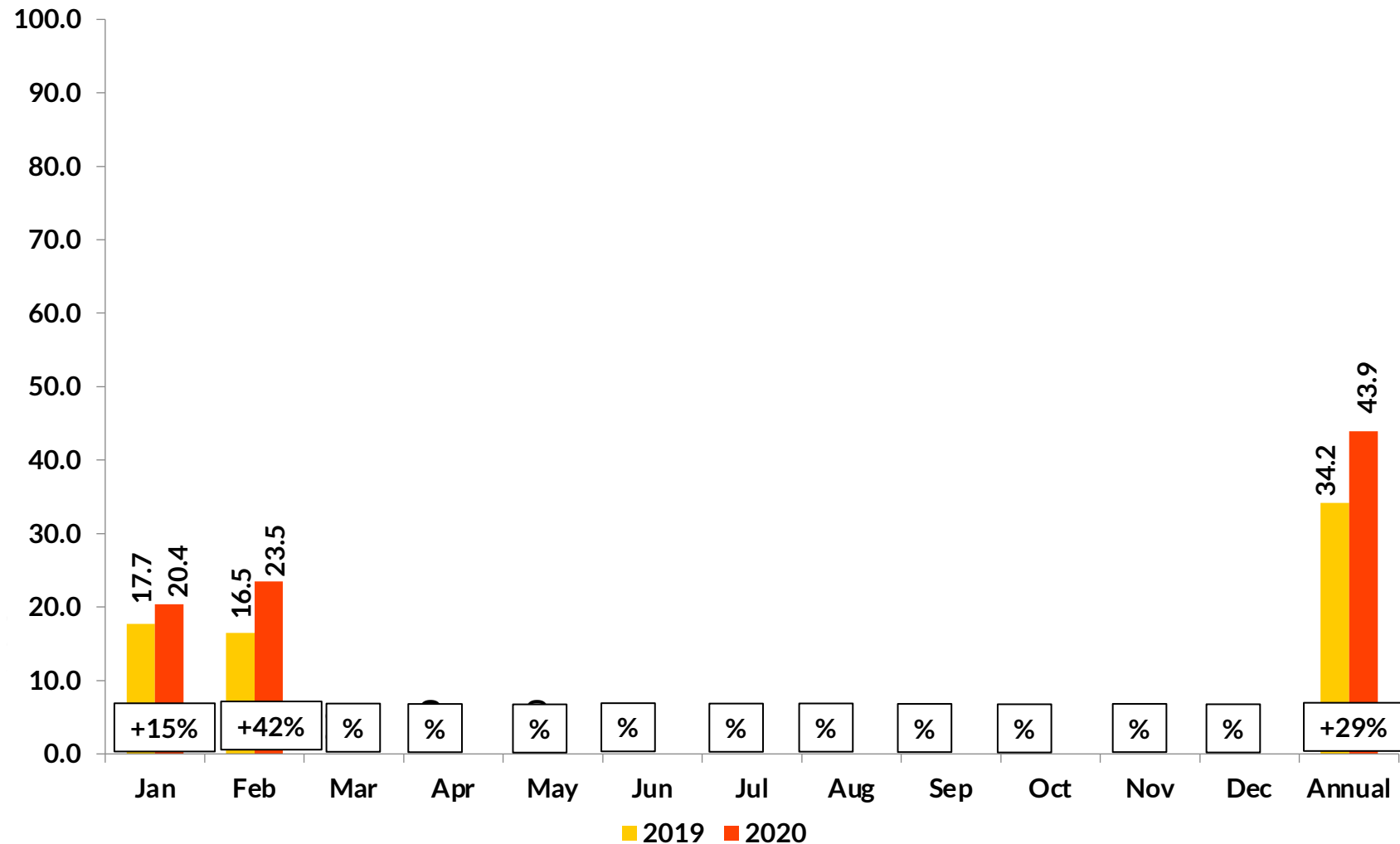
June had the highest dollar
velocity with \$304/store/week.

2020 Strategic Goal
\$279/store/week.



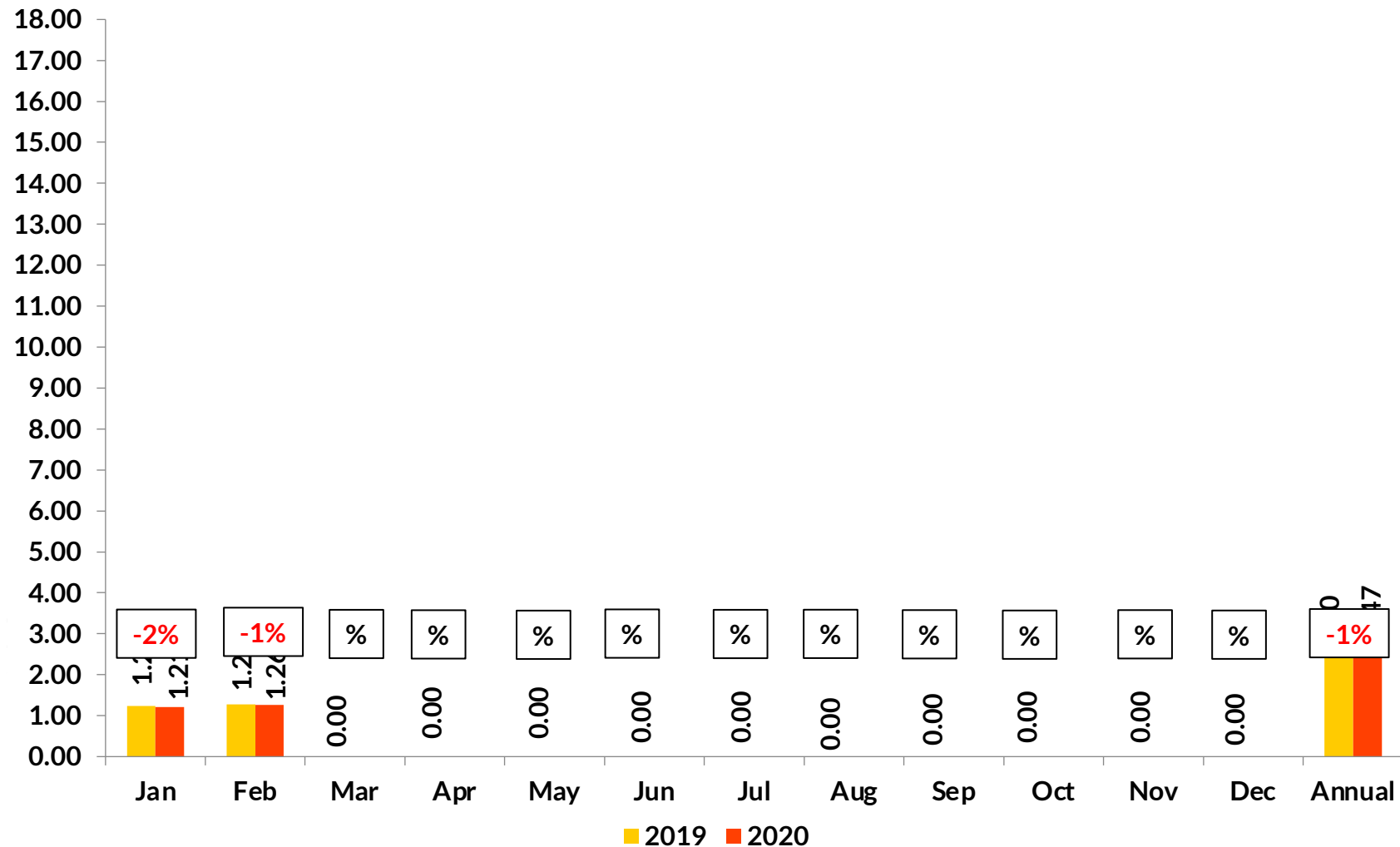
2020
VOLUME

U.S. Monthly Volume Millions Whole Mango

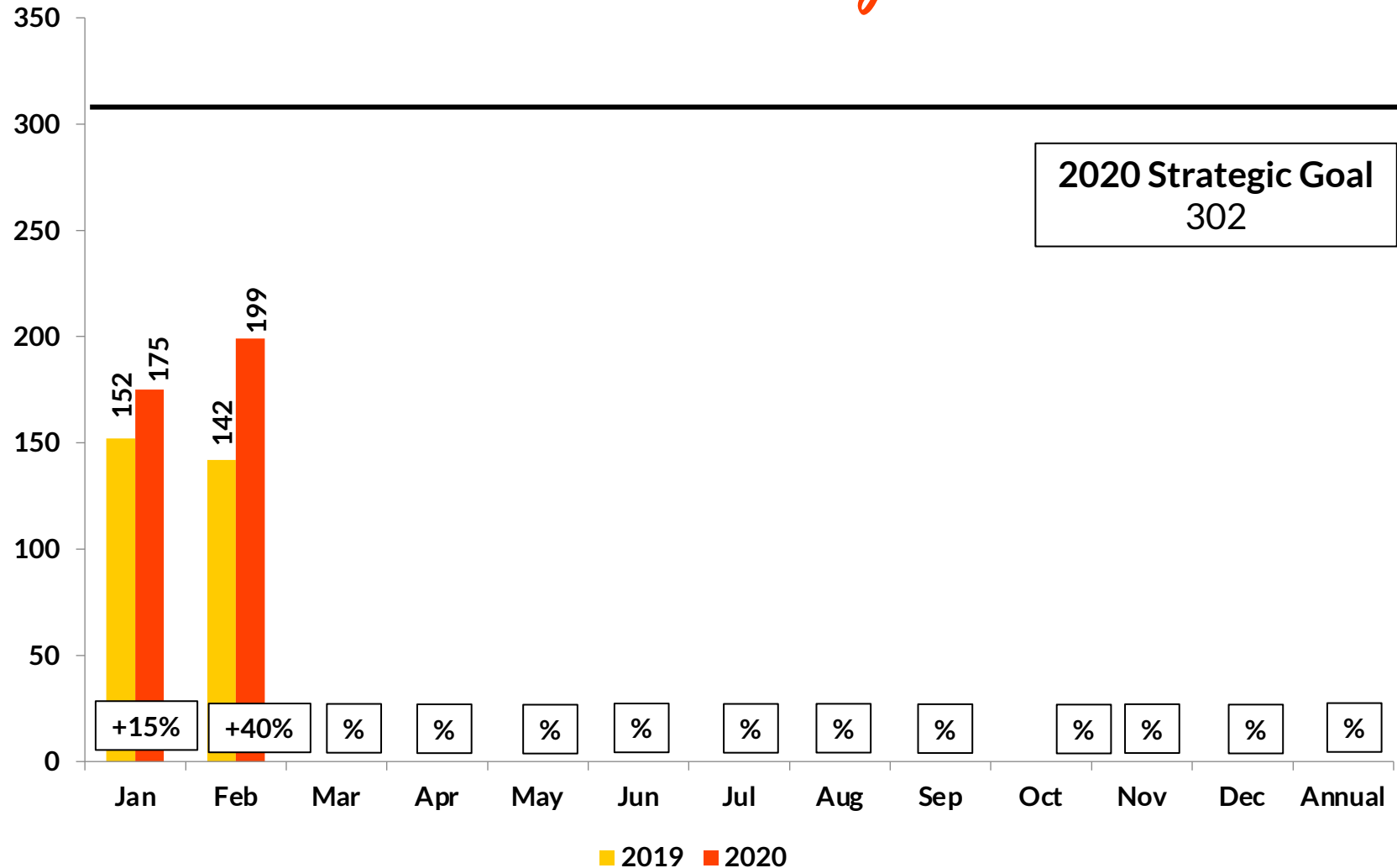


2020
VOLUME

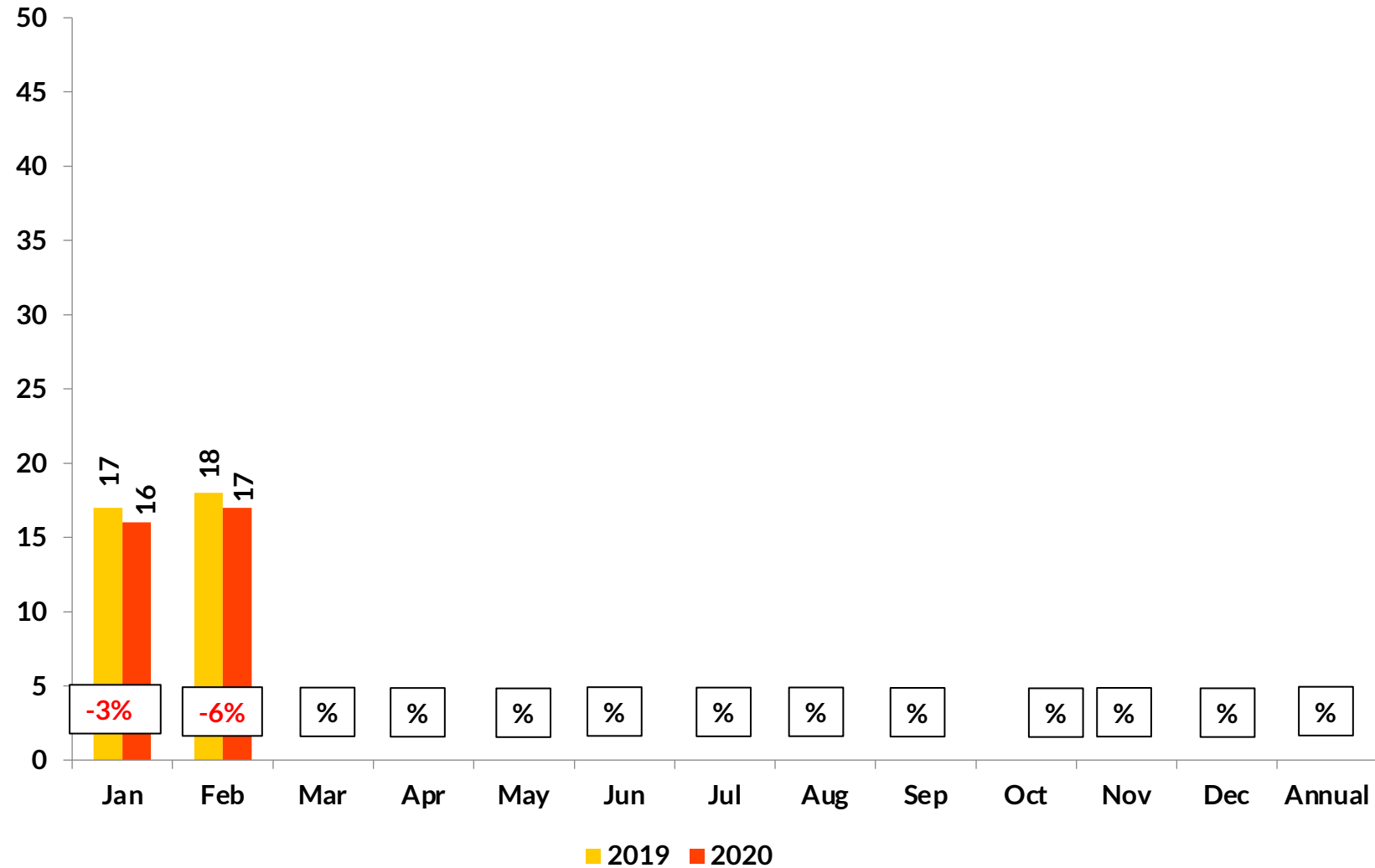
U.S. Monthly Volume Millions Fresh Cut



U.S. Monthly Volume Velocity Whole Mango

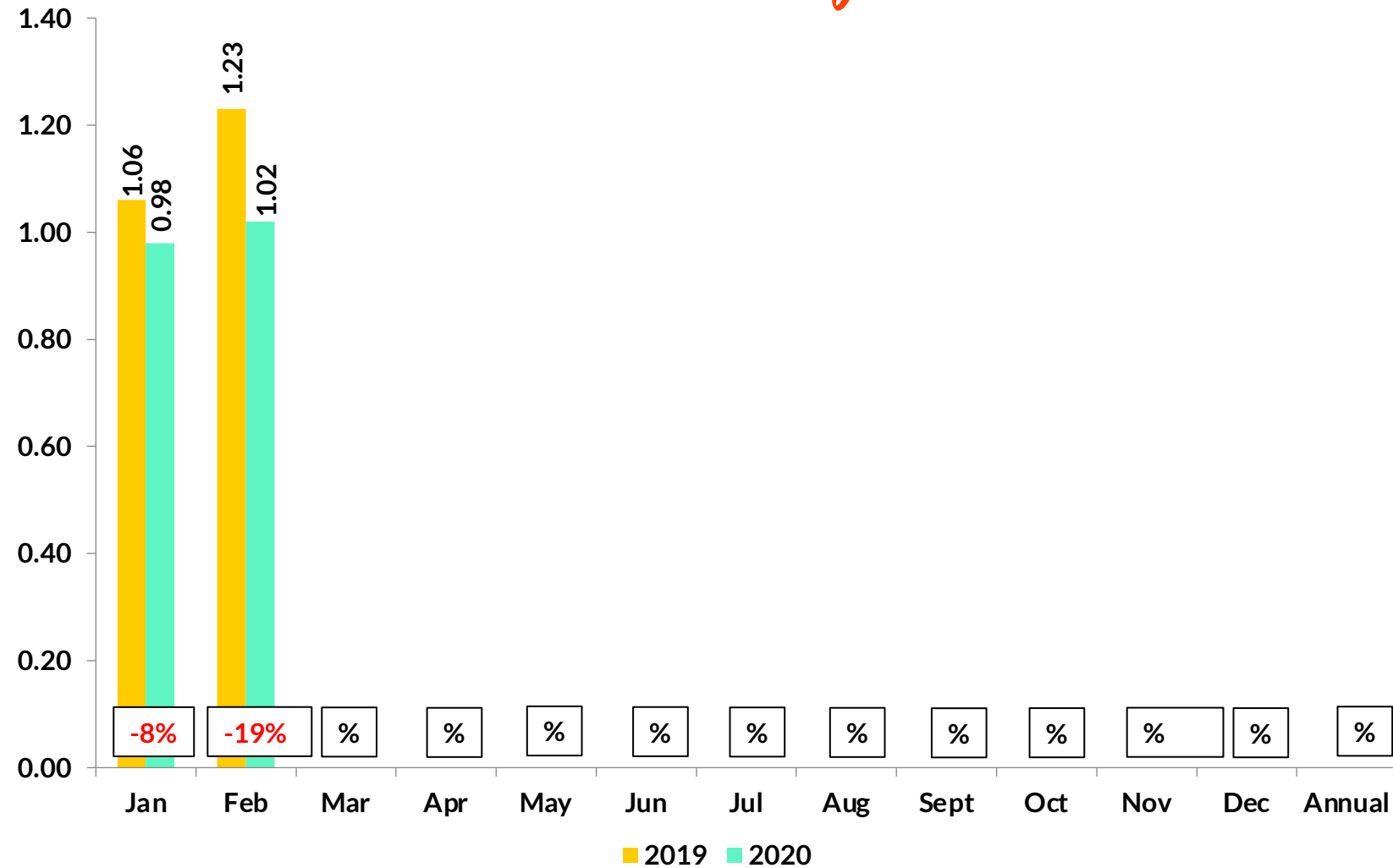


U.S. Monthly Volume Velocity Fresh Cut



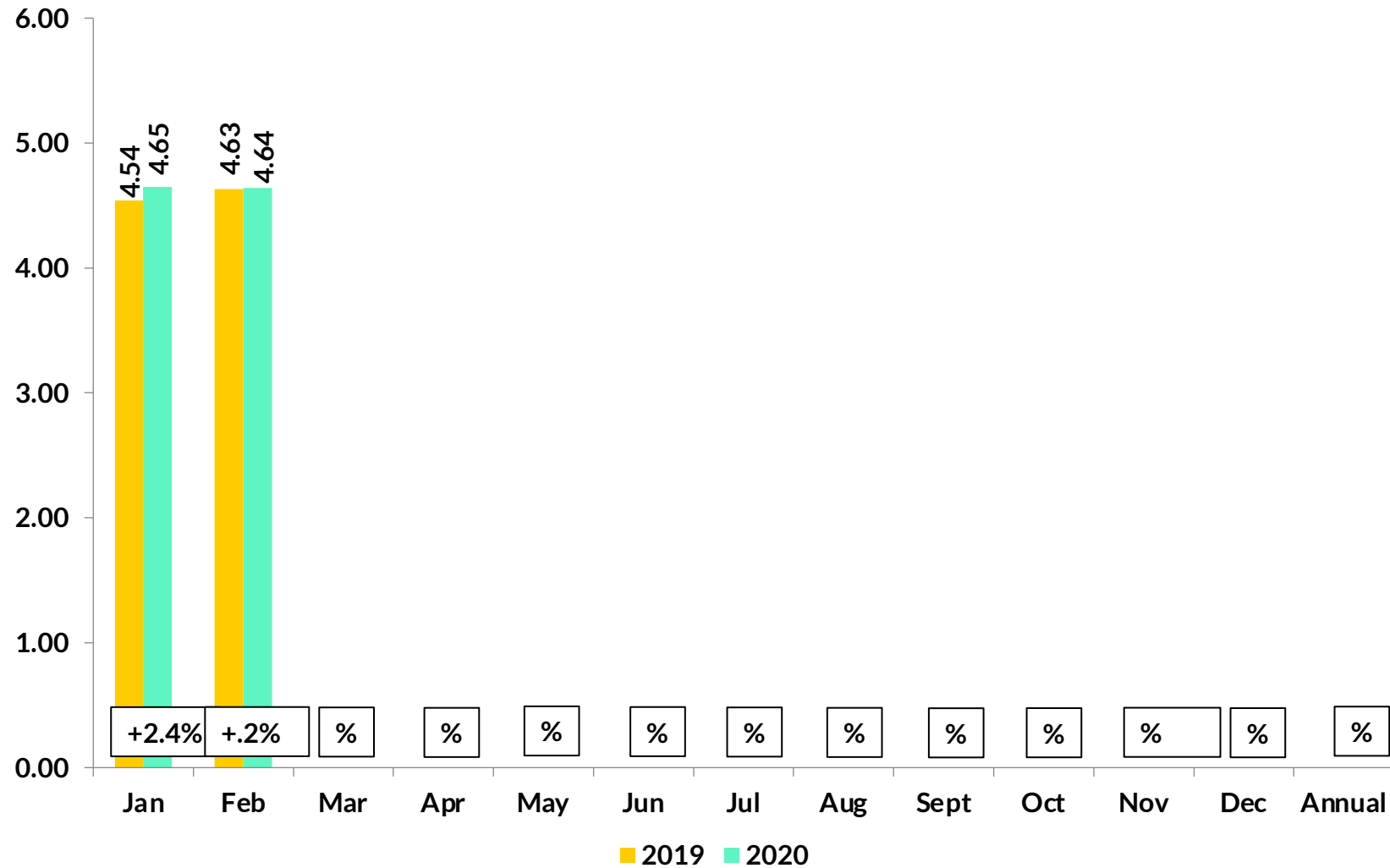
2020
AVERAGE
UNIT PRICE

U.S. Monthly Average Unit Price Whole Mango



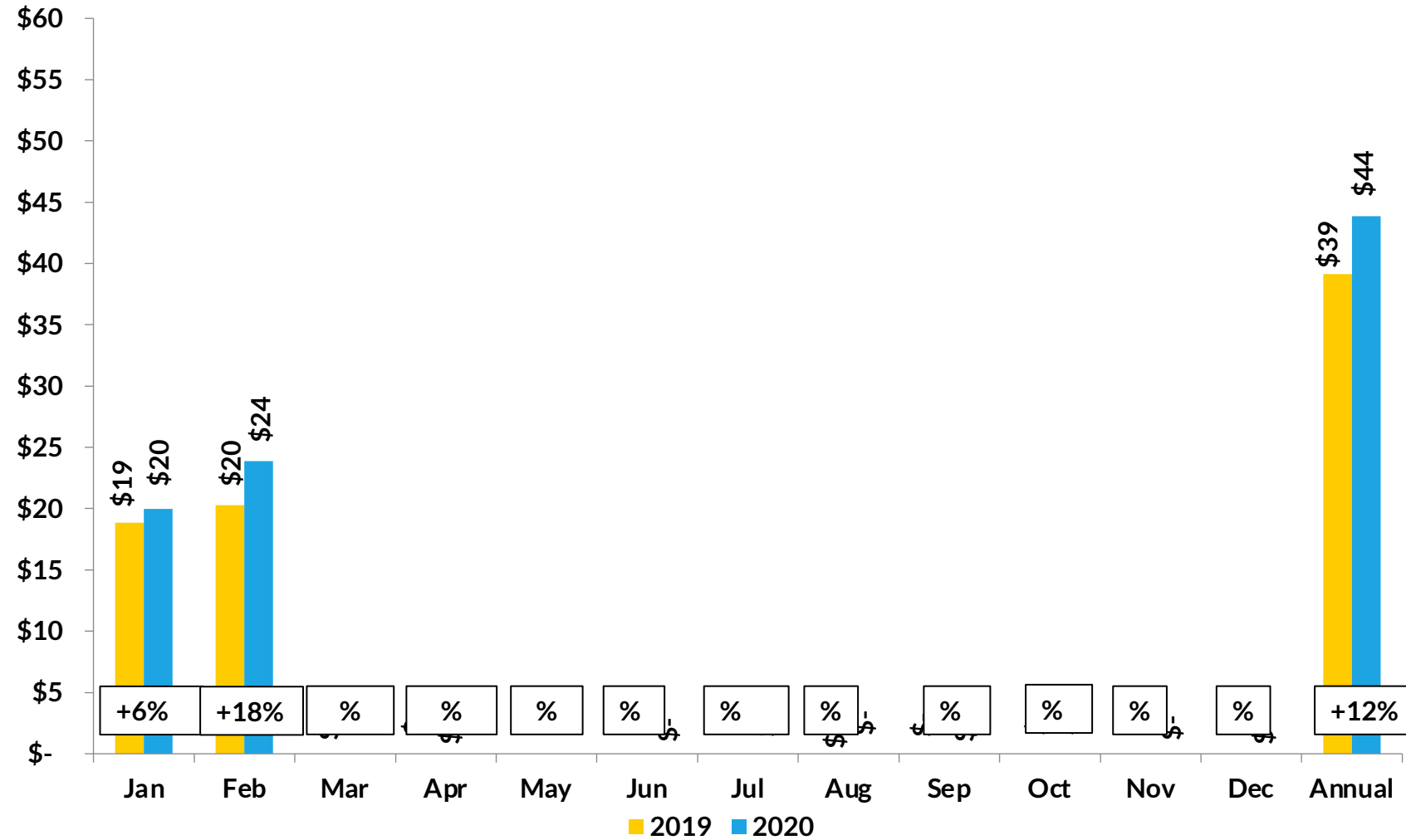
2020
AVERAGE
UNIT PRICE

U.S. Monthly Average Unit Price
Fresh Cut



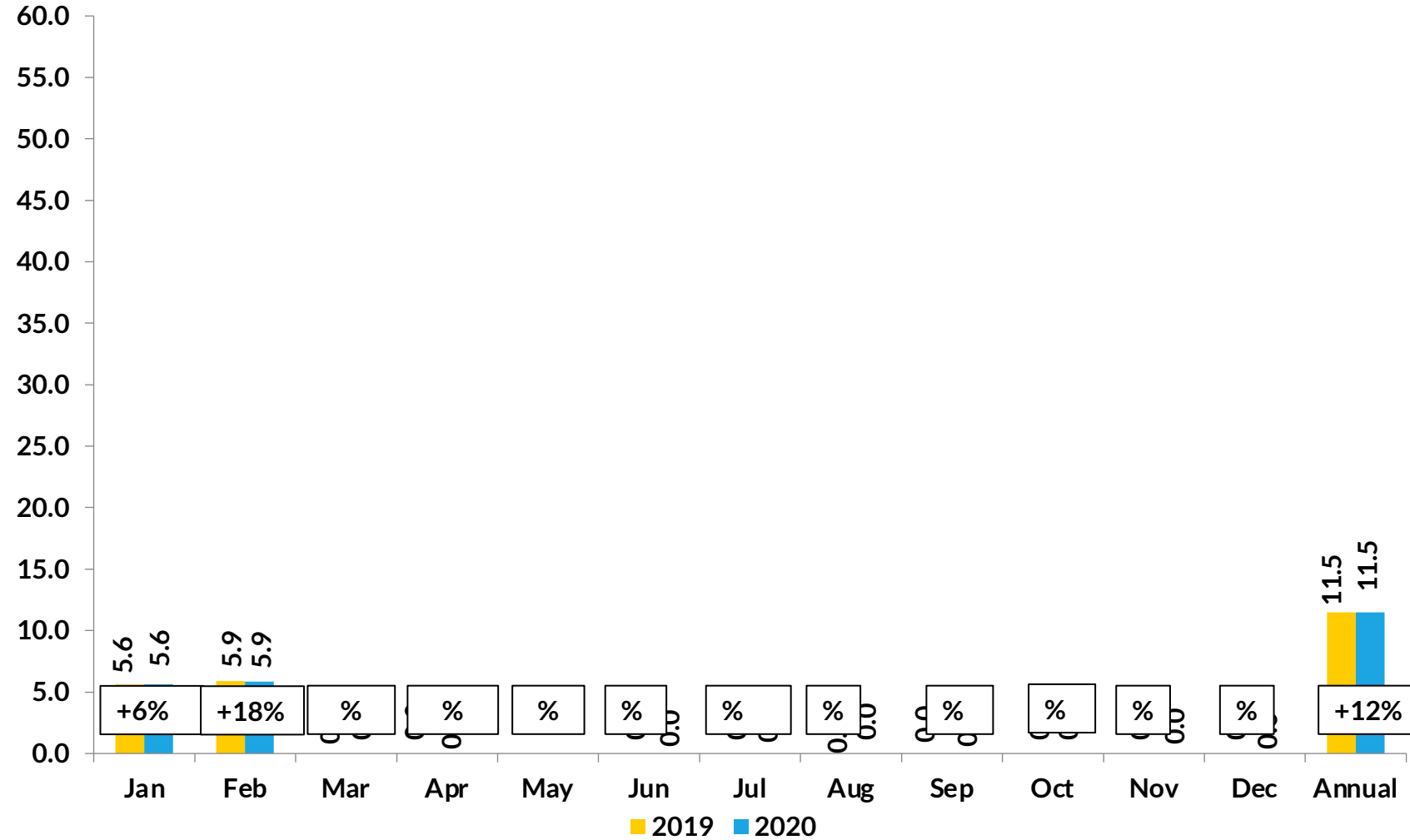
2020
DOLLARS

U.S. Total Dollar Millions Whole Mango



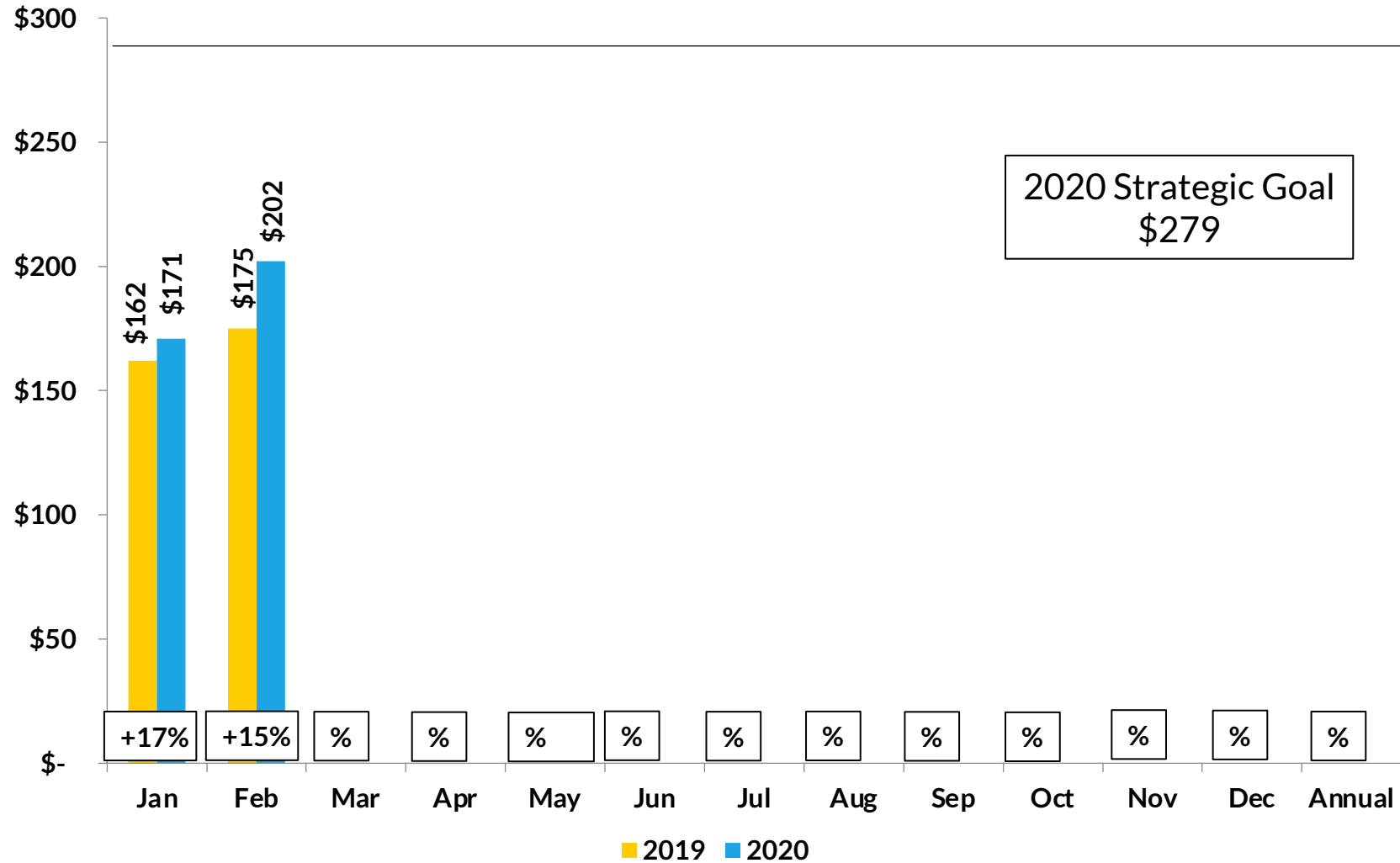
2020
DOLLARS

U.S. Total Dollar Millions Fresh Cut



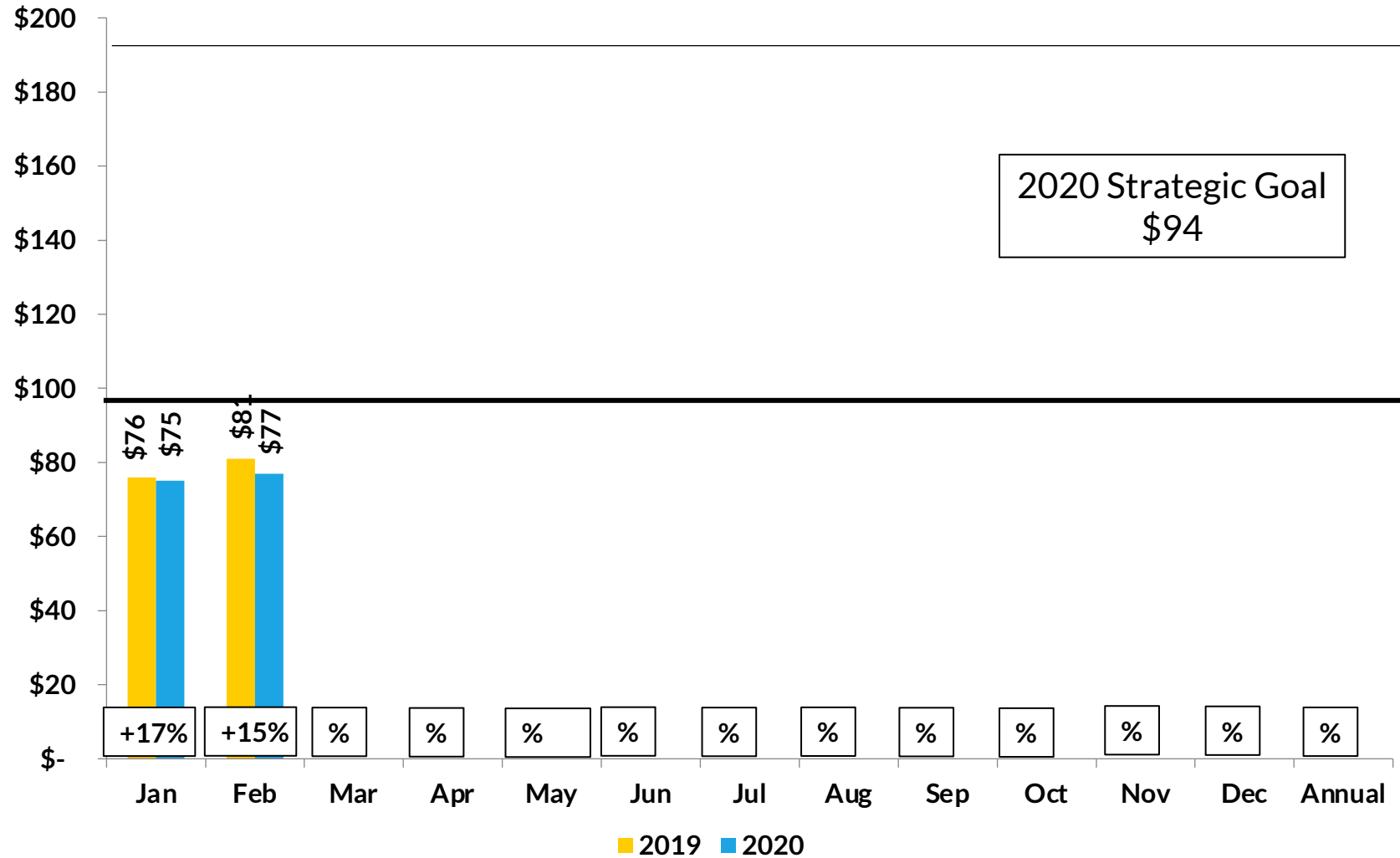
2020
DOLLARS

U.S. Monthly Dollar Velocity Whole Mango



2020
DOLLARS

U.S. Monthly Dollar Velocity Fresh Cut

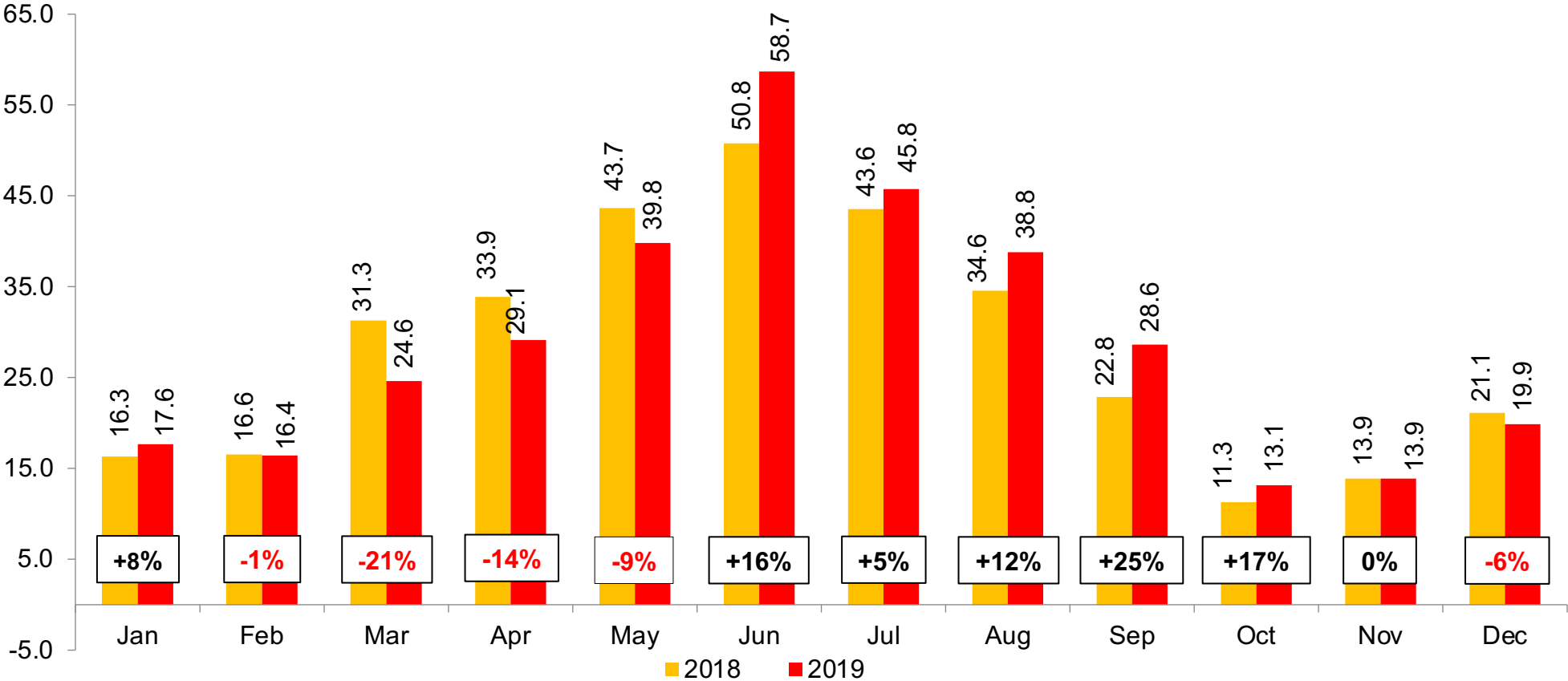


REGIONAL DATA

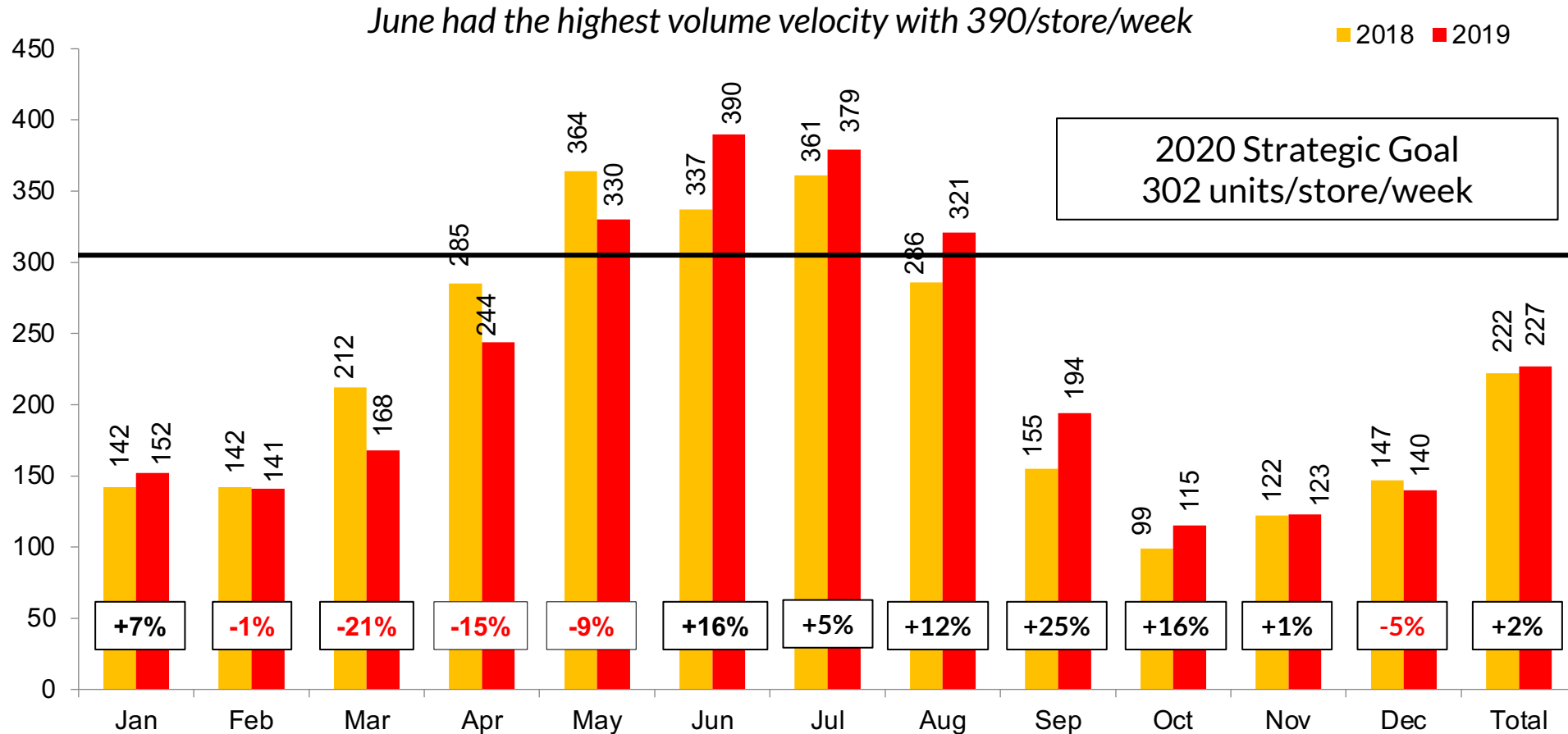


2019

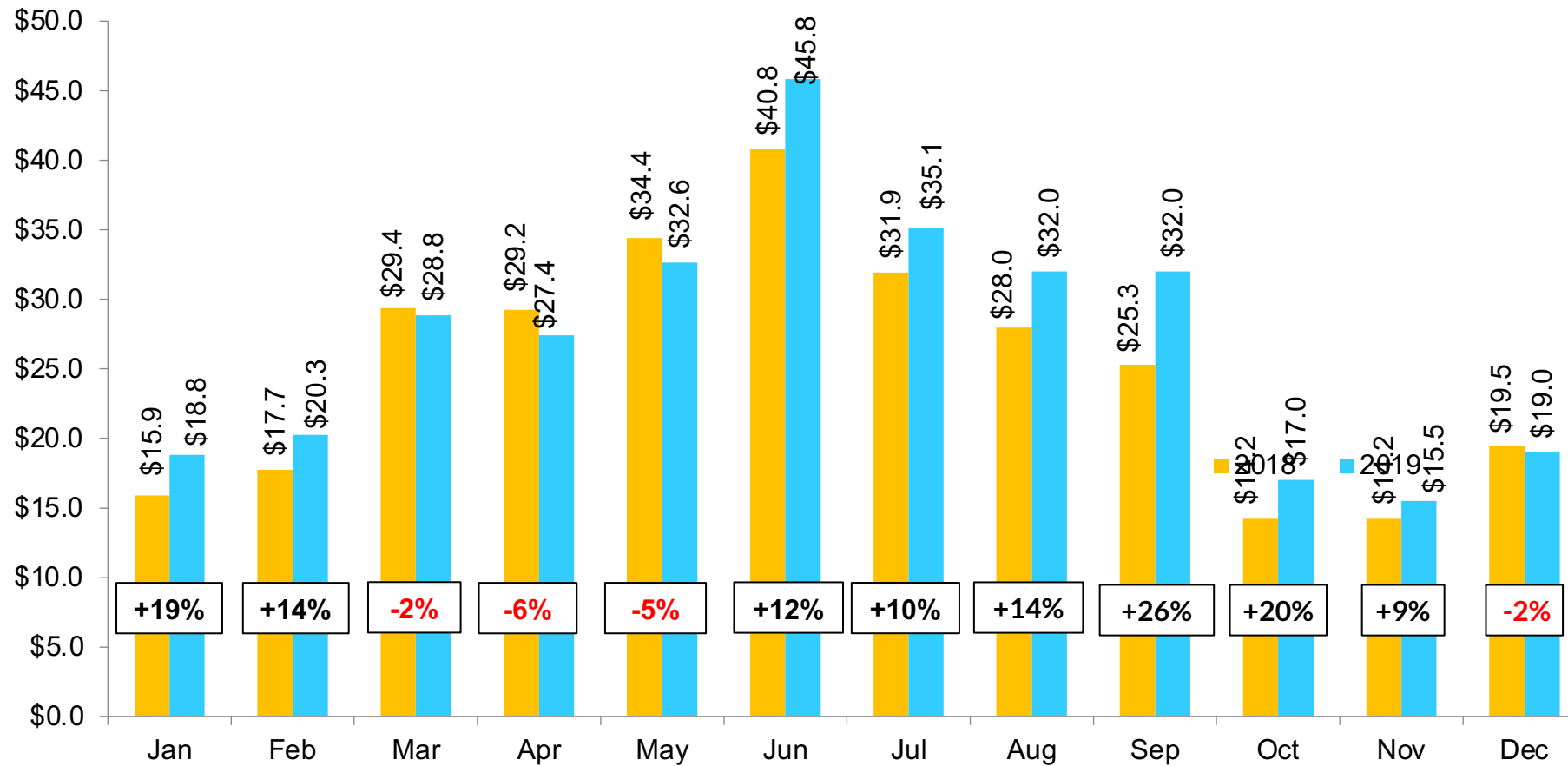
MONTHLY MANGO VOLUME (MILLIONS)



MONTHLY MANGO VELOCITY (VOLUME/STORE/WEEK)

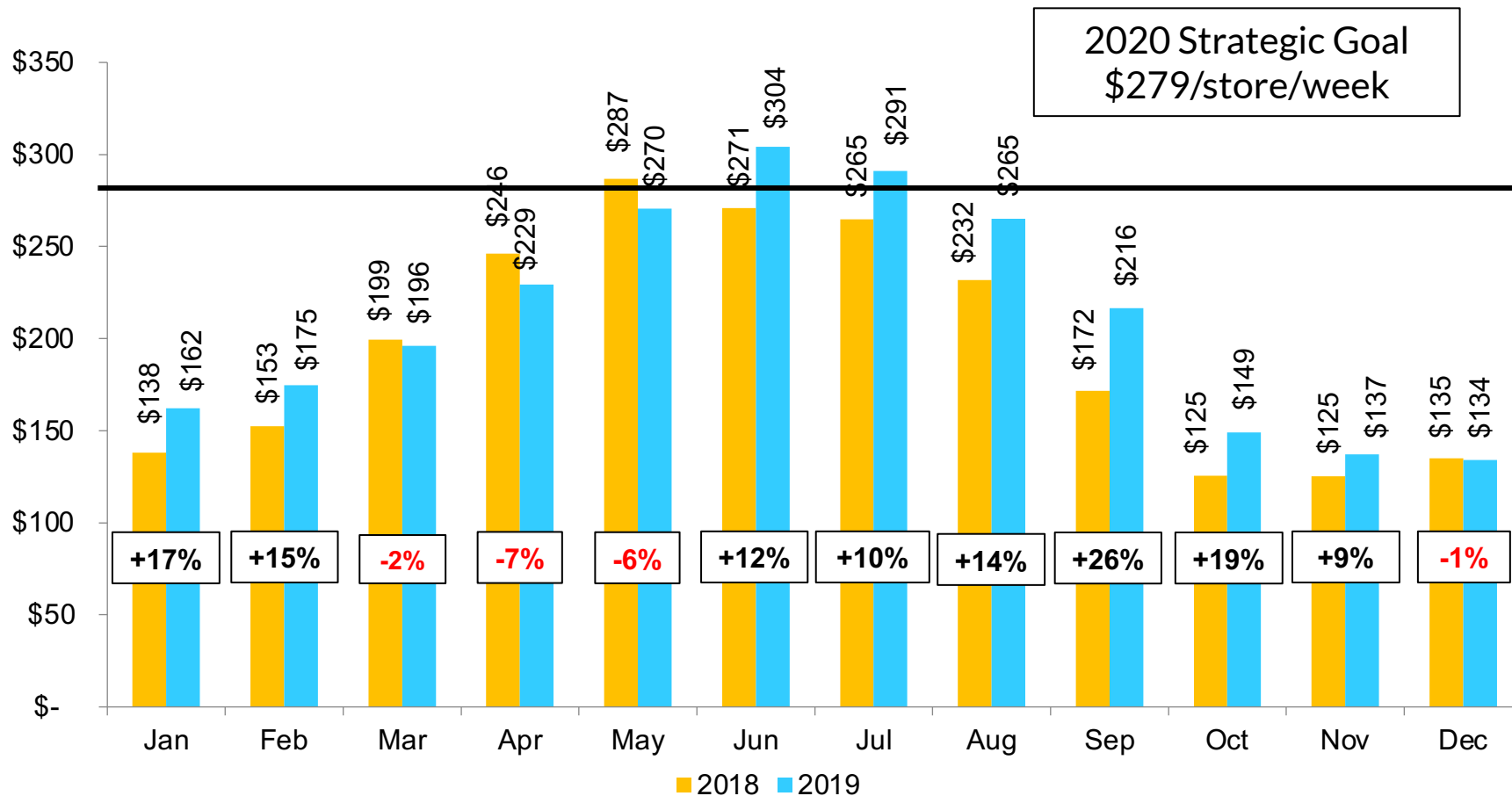


MONTHLY MANGO SALES (MILLIONS)



MONTHLY MANGO SALES VELOCITY (DOLLARS/STORE/WEEK)

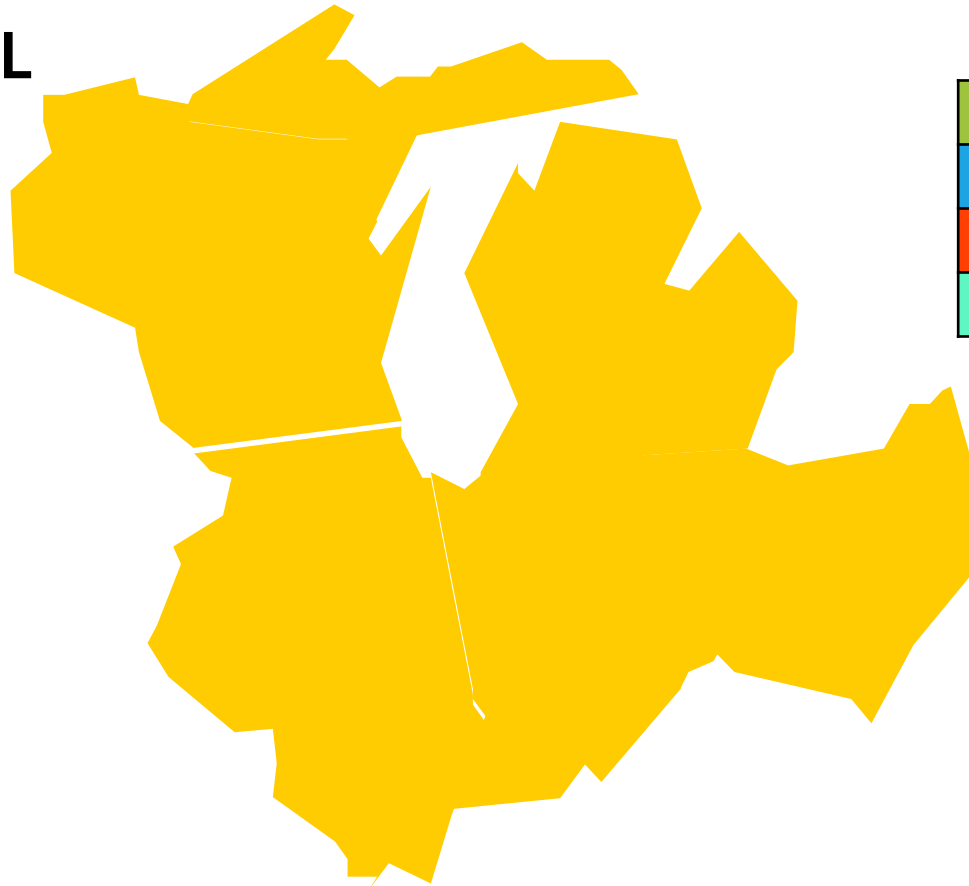
June had the highest dollar velocity with \$303/store/week



REGIONAL OVERVIEW 2019 / VOLUME / SALES VELOCITY & AVG. RETAIL PRICE

EAST NORTH CENTRAL

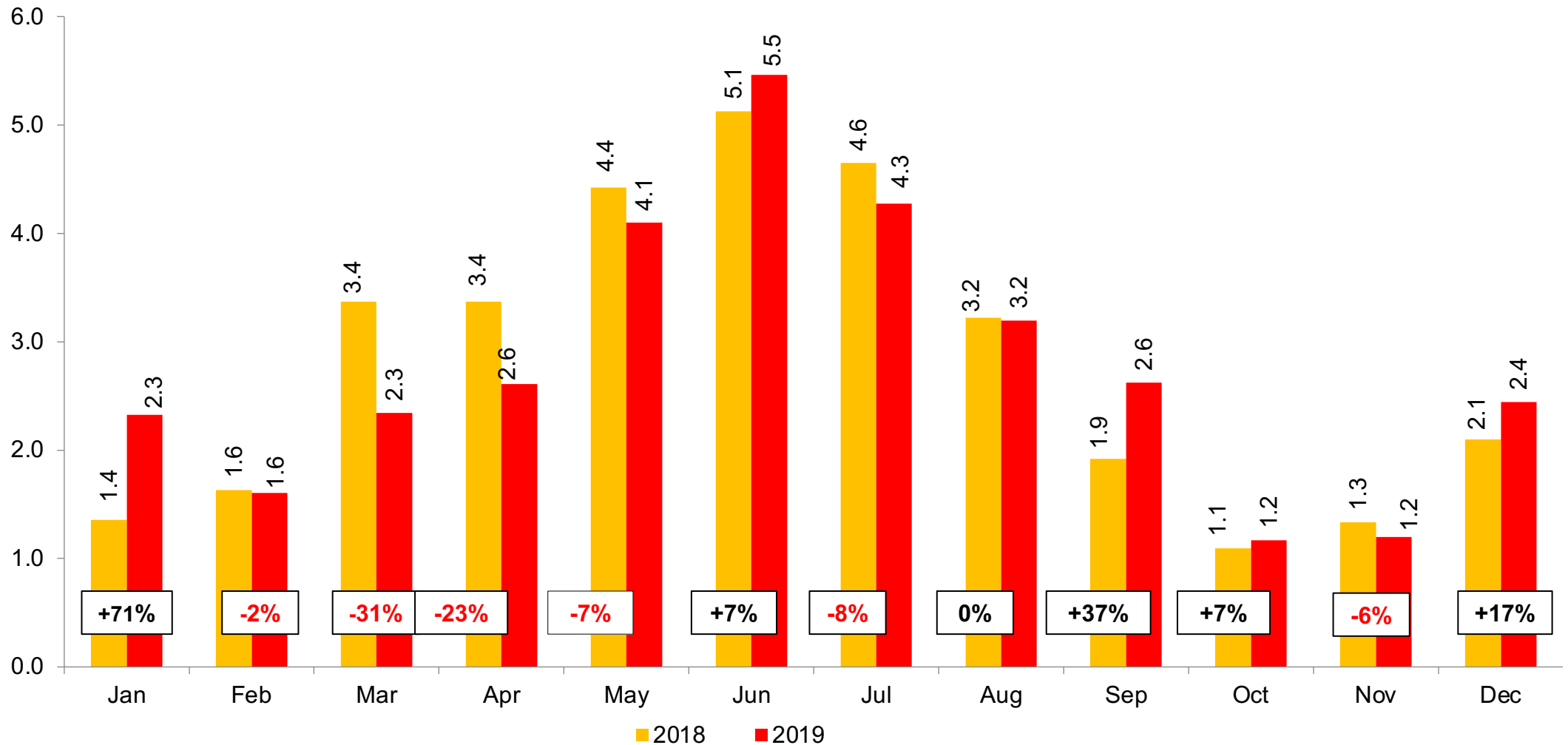
Wisconsin
Michigan
Illinois
Indiana
Ohio



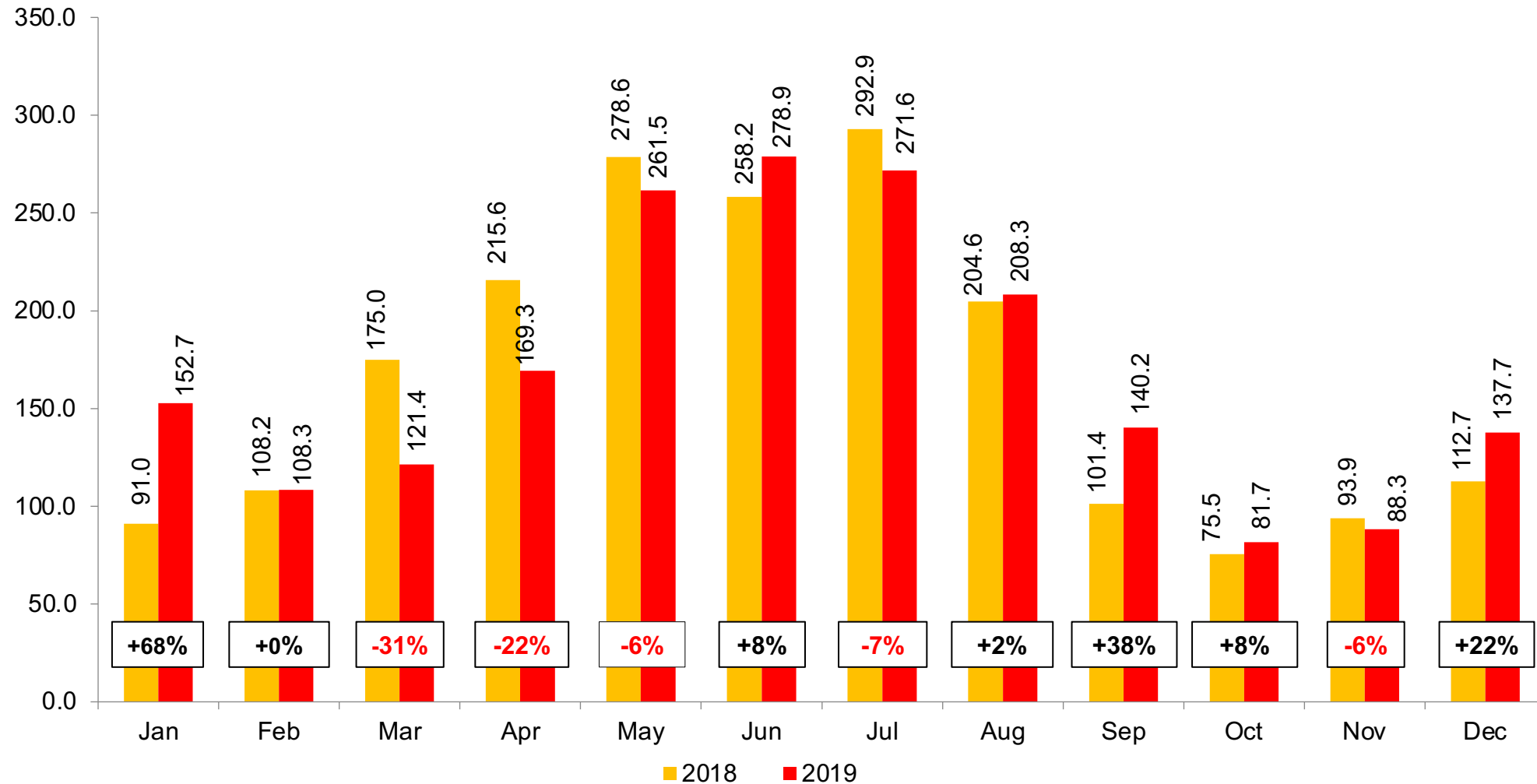
0.40%
\$163
170
\$0.96

Legend	Total US
Dollars Contribution	0.52%
Dollars per Store/Week	\$212
Volume per Store/Week	227
Average Retail Price	\$0.94

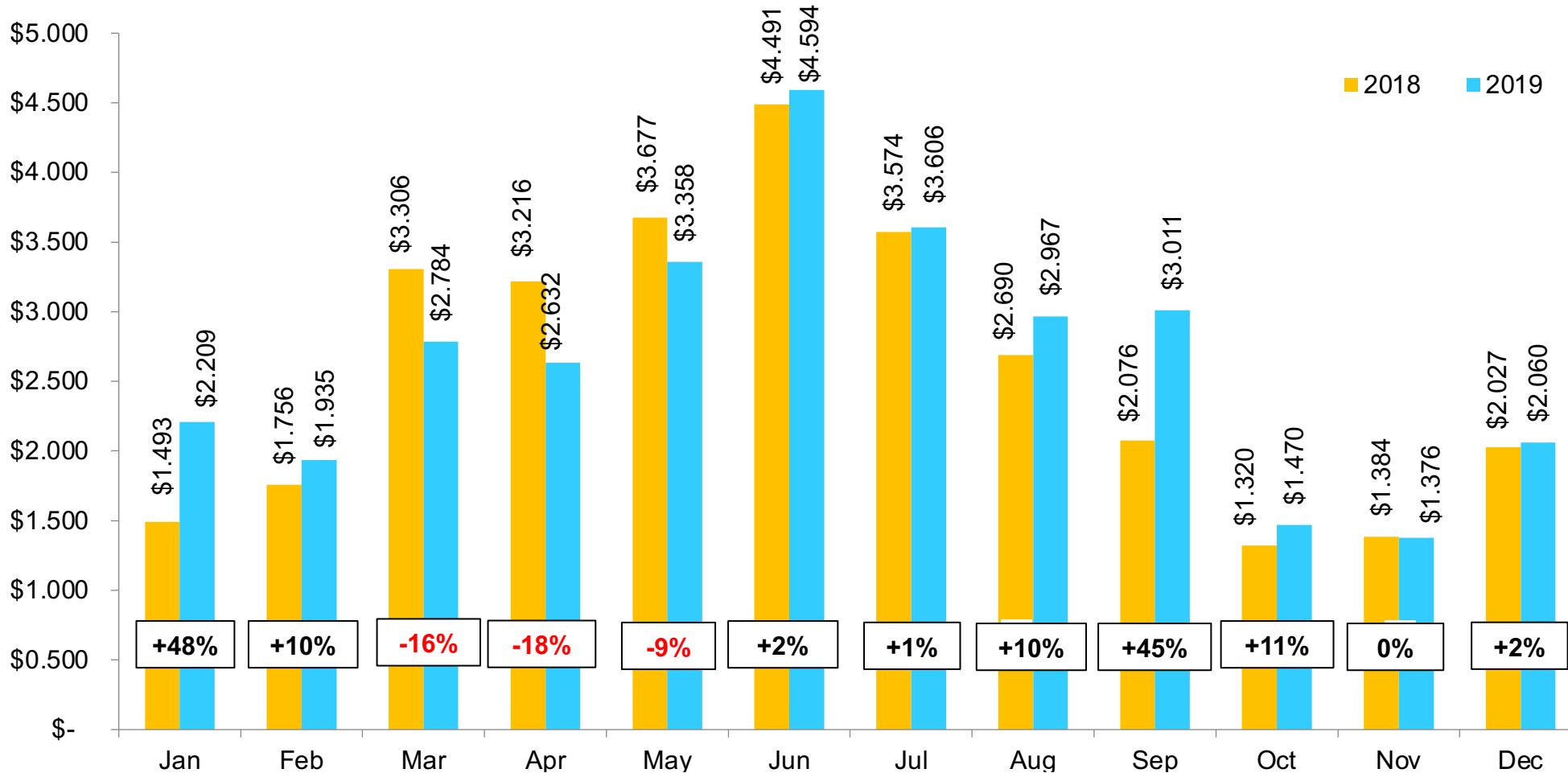
EAST NORTH CENTRAL MONTHLY MANGO VOLUME (MILLIONS)



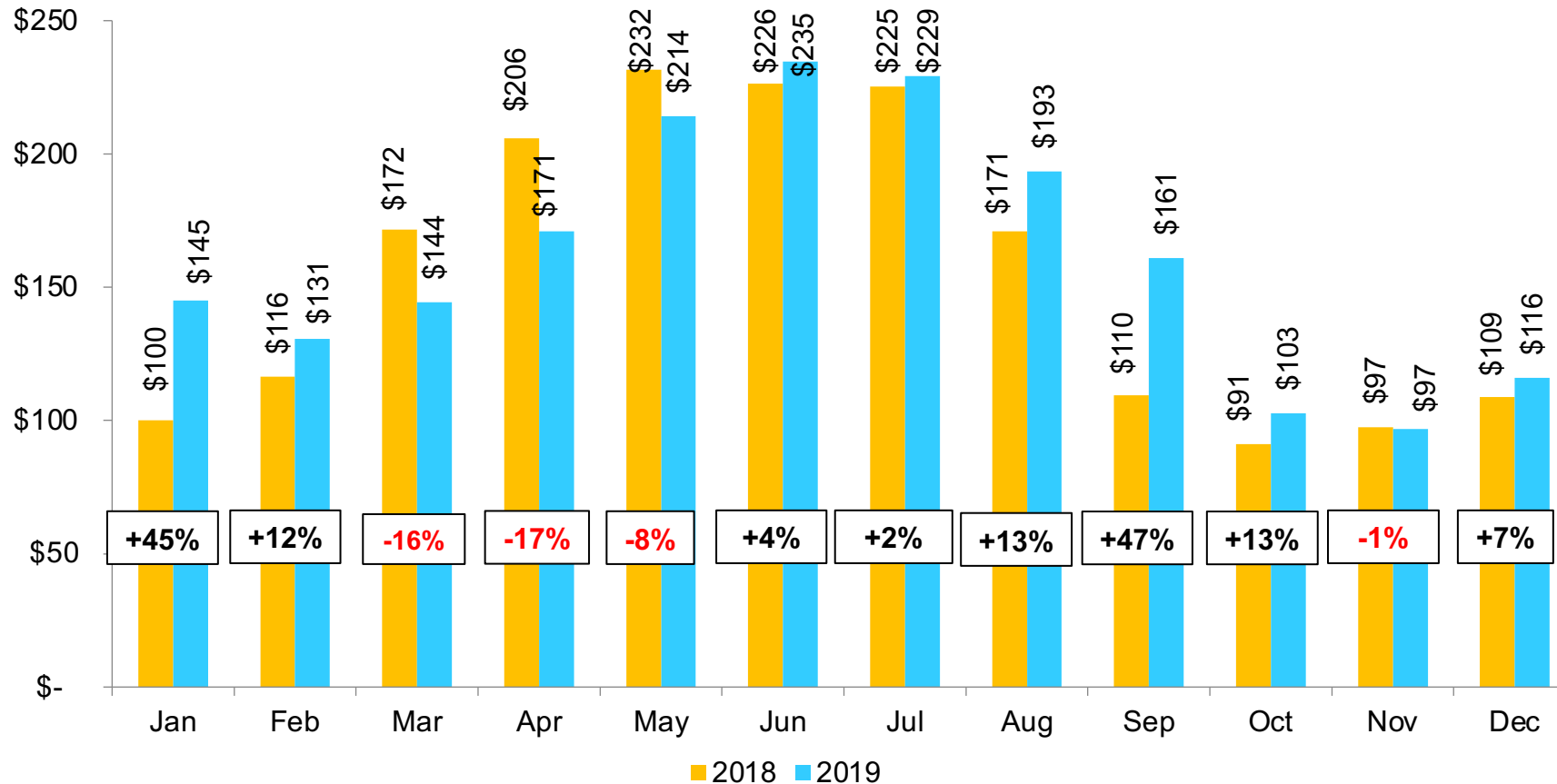
EAST NORTH CENTRAL MONTHLY MANGO VOLUME/STORE/WEEK



EAST NORTH CENTRAL MONTHLY MANGO SALES (MILLIONS)



EAST NORTH CENTRAL MONTHLY DOLLARS/STORE/WEEK



REGIONAL OVERVIEW 2019 / VOLUME / SALES VELOCITY & AVG. RETAIL PRICE

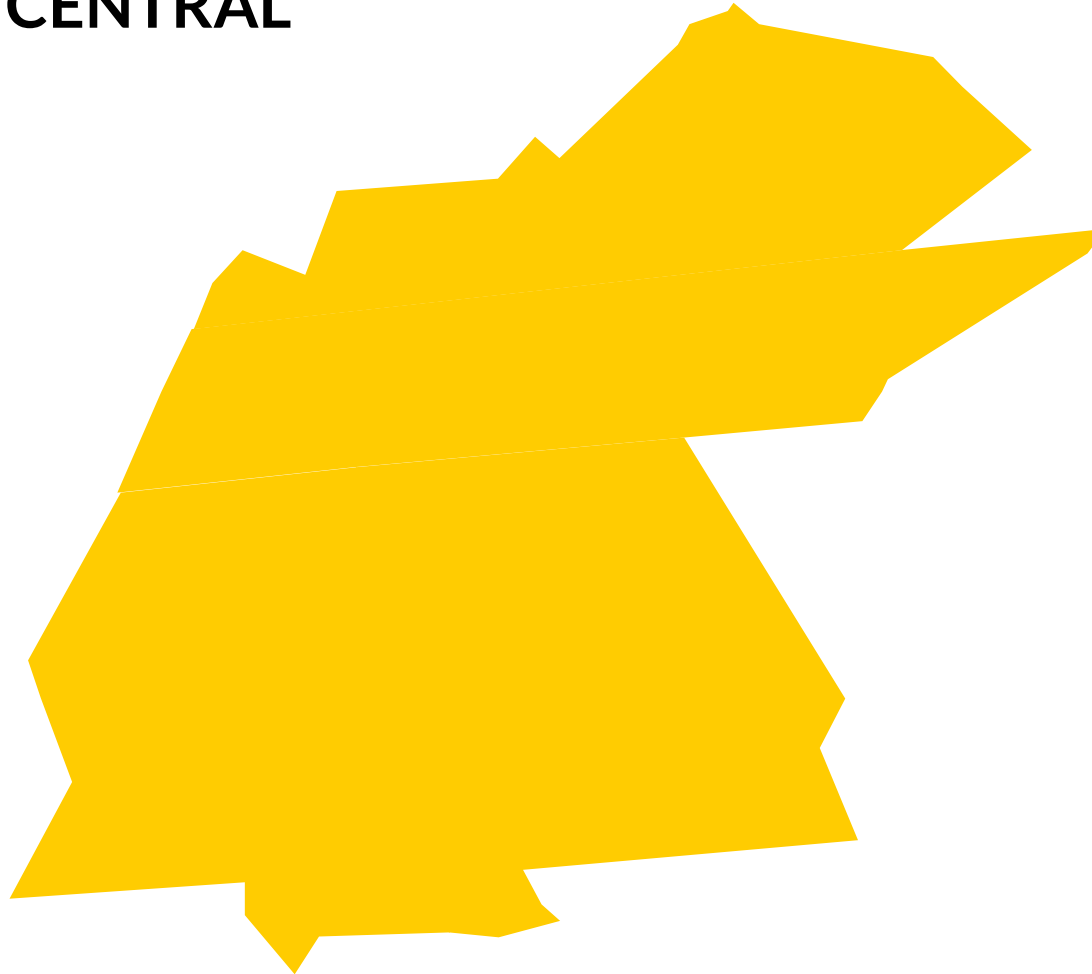
EAST SOUTH CENTRAL

Mississippi

Alabama

Tennessee

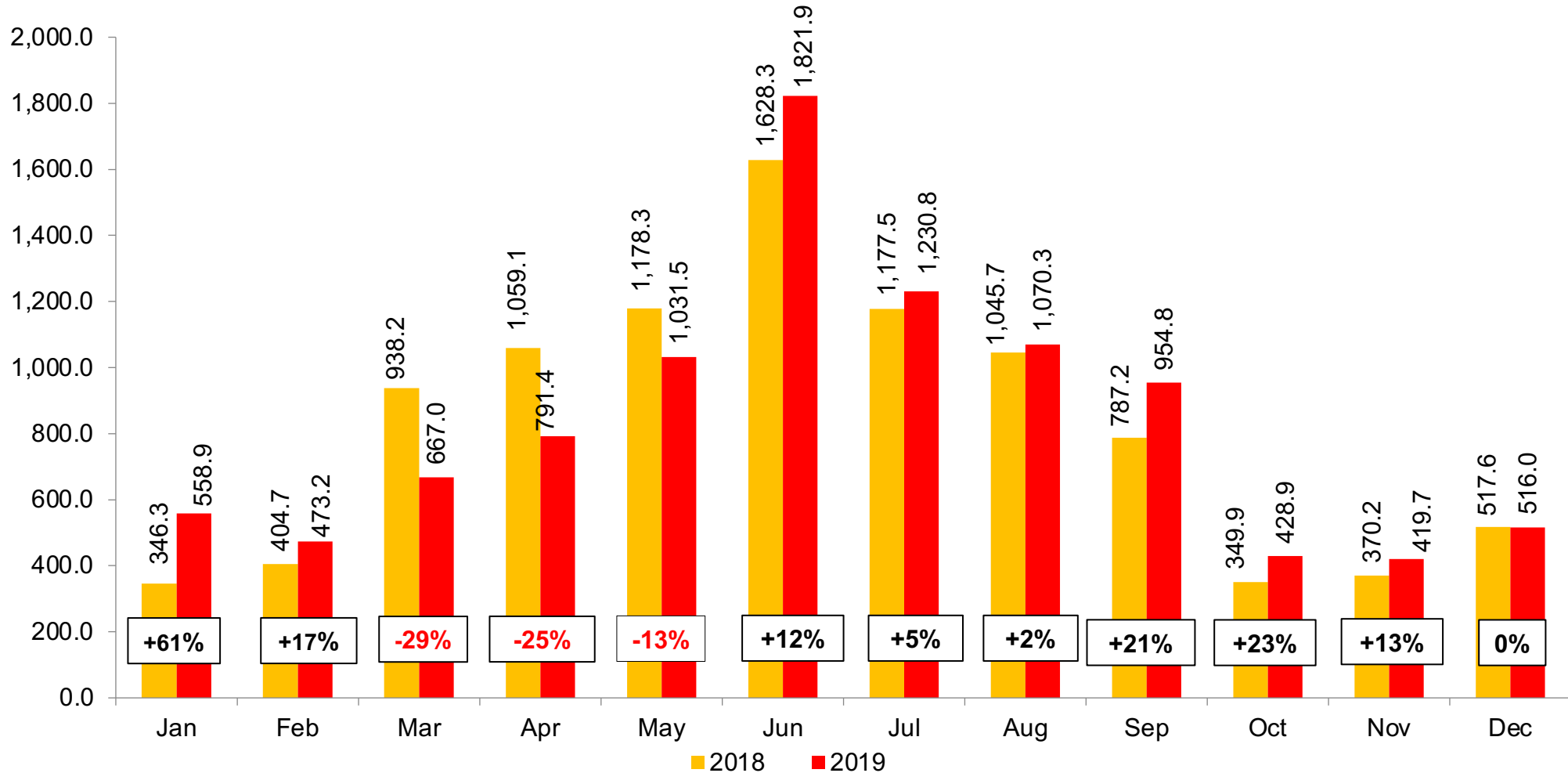
Kentucky



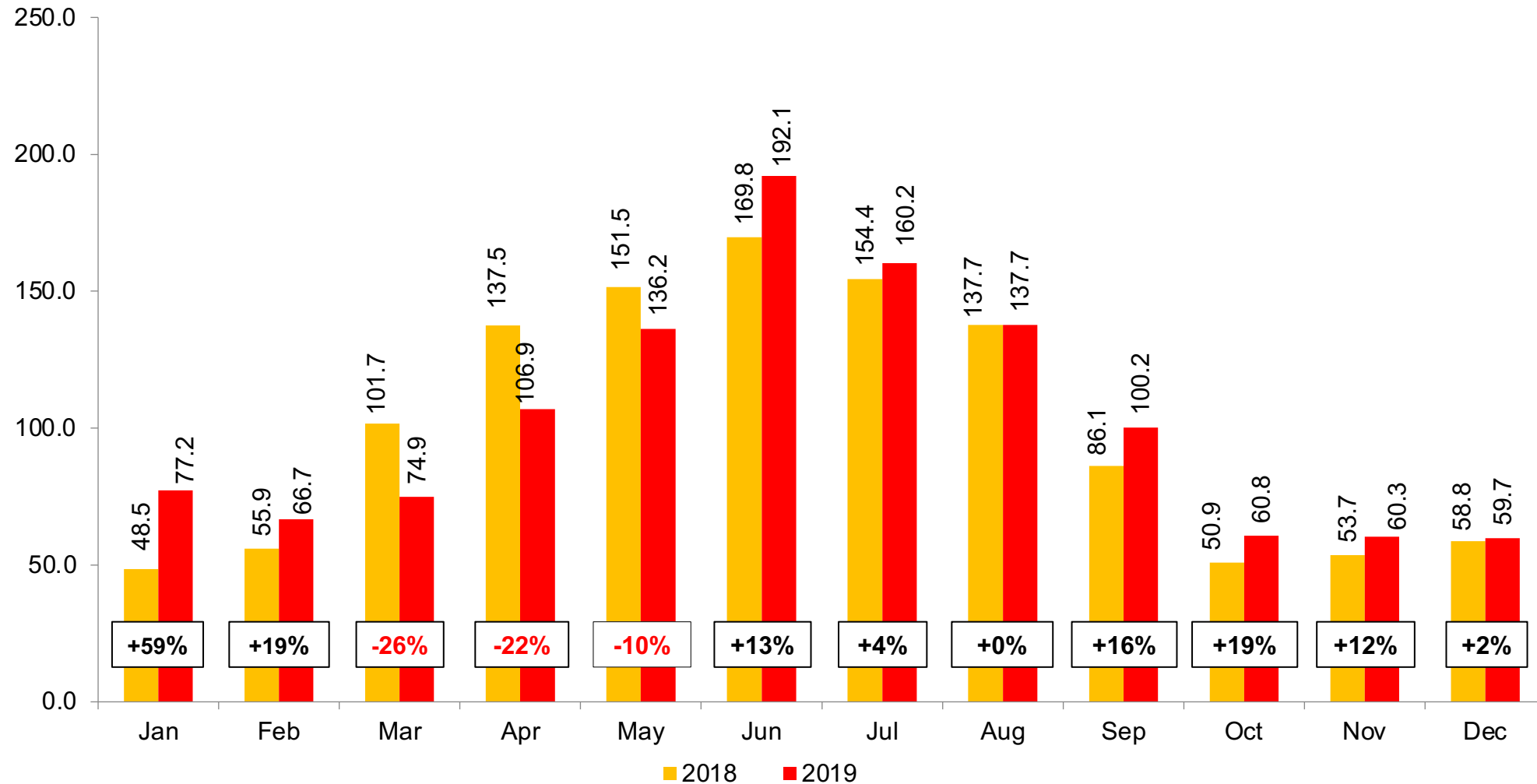
0.32%
\$101
105
\$0.97

Legend	Total US
Dollars Contribution	0.52%
Dollars per Store/Week	\$212
Volume per Store/Week	227
Average Retail Price	\$0.94

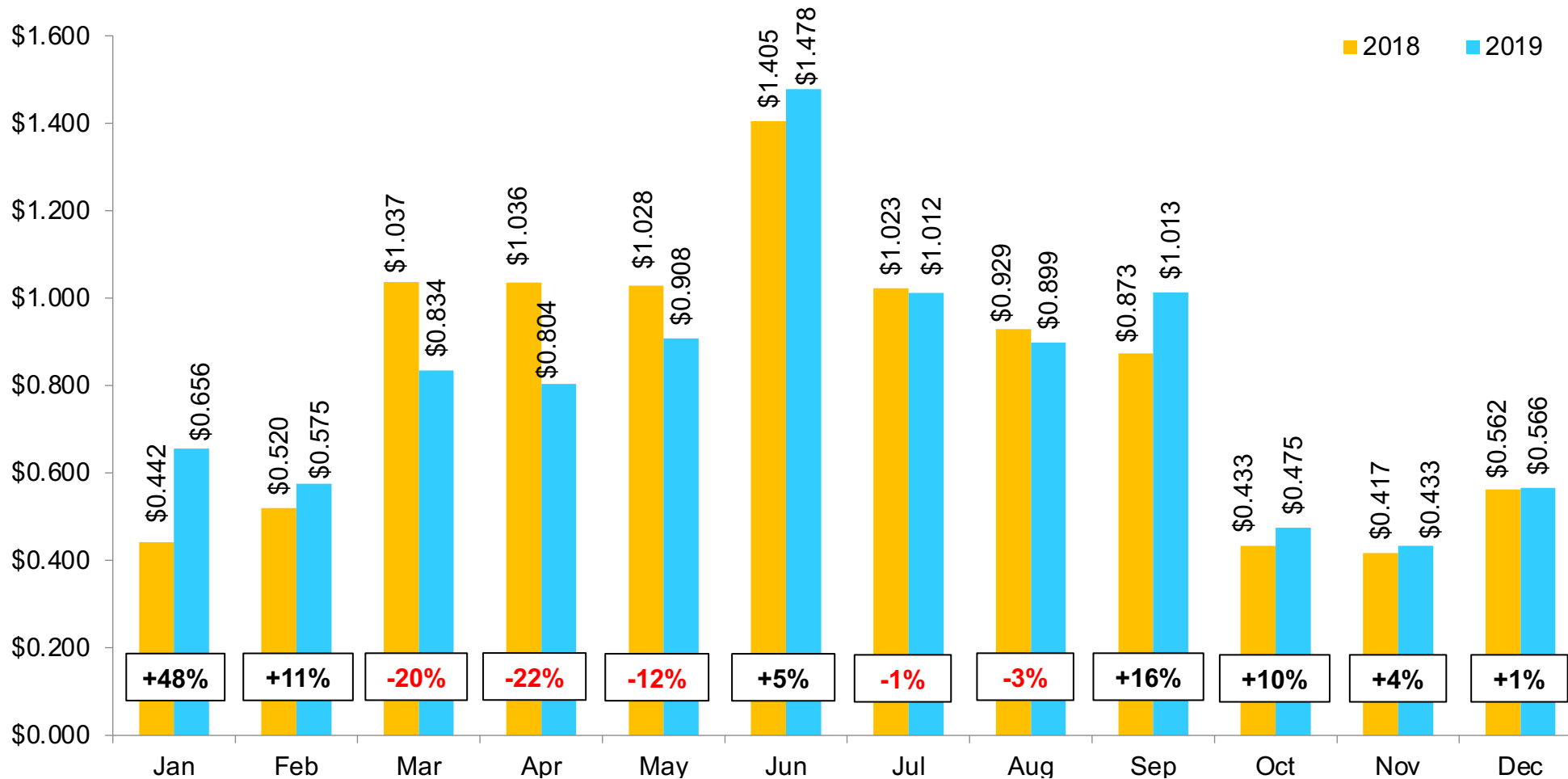
EAST SOUTH CENTRAL MONTHLY MANGO VOLUME (MILLIONS)



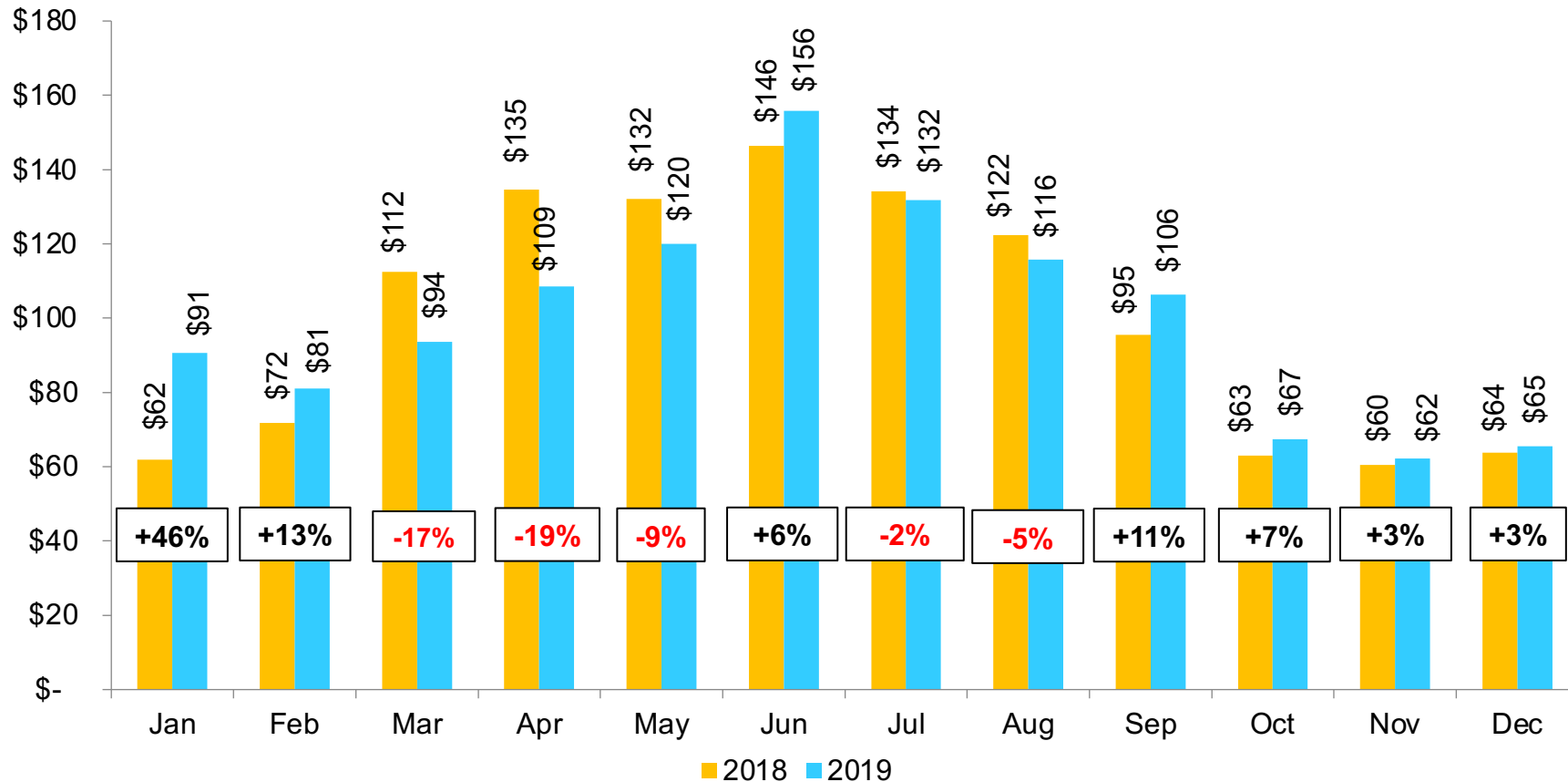
EAST SOUTH CENTRAL MONTHLY MANGO VOLUME/STORE/WEEK



EAST SOUTH CENTRAL MONTHLY MANGO SALES (MILLIONS)



EAST SOUTH CENTRAL MONTHLY DOLLARS/STORE/WEEK



REGIONAL OVERVIEW 2019 / VOLUME / SALES VELOCITY & AVG. RETAIL PRICE

MID-ATLANTIC

New York

Pennsylvania

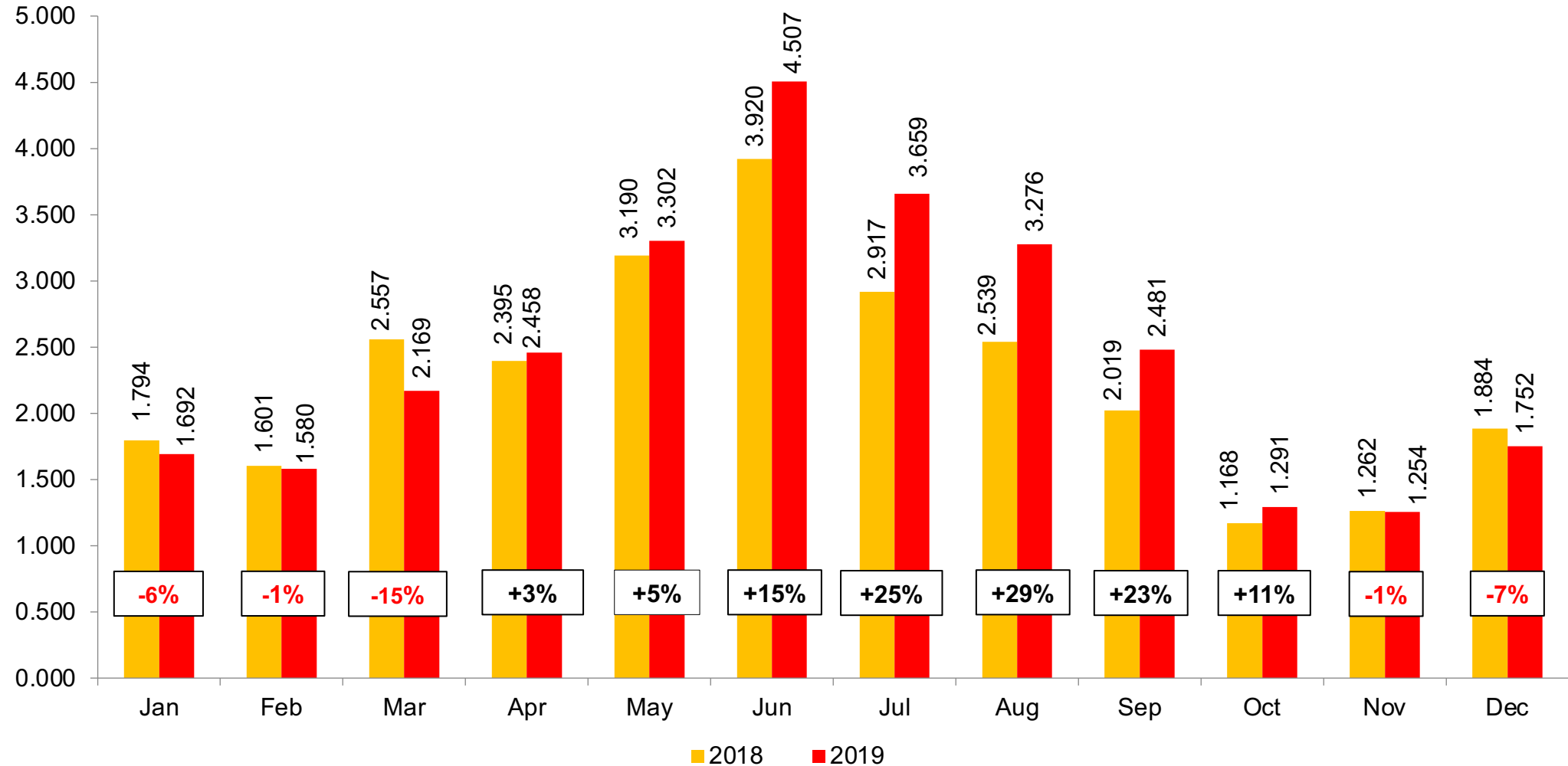
New Jersey



0.47%
\$211
169
\$1.25

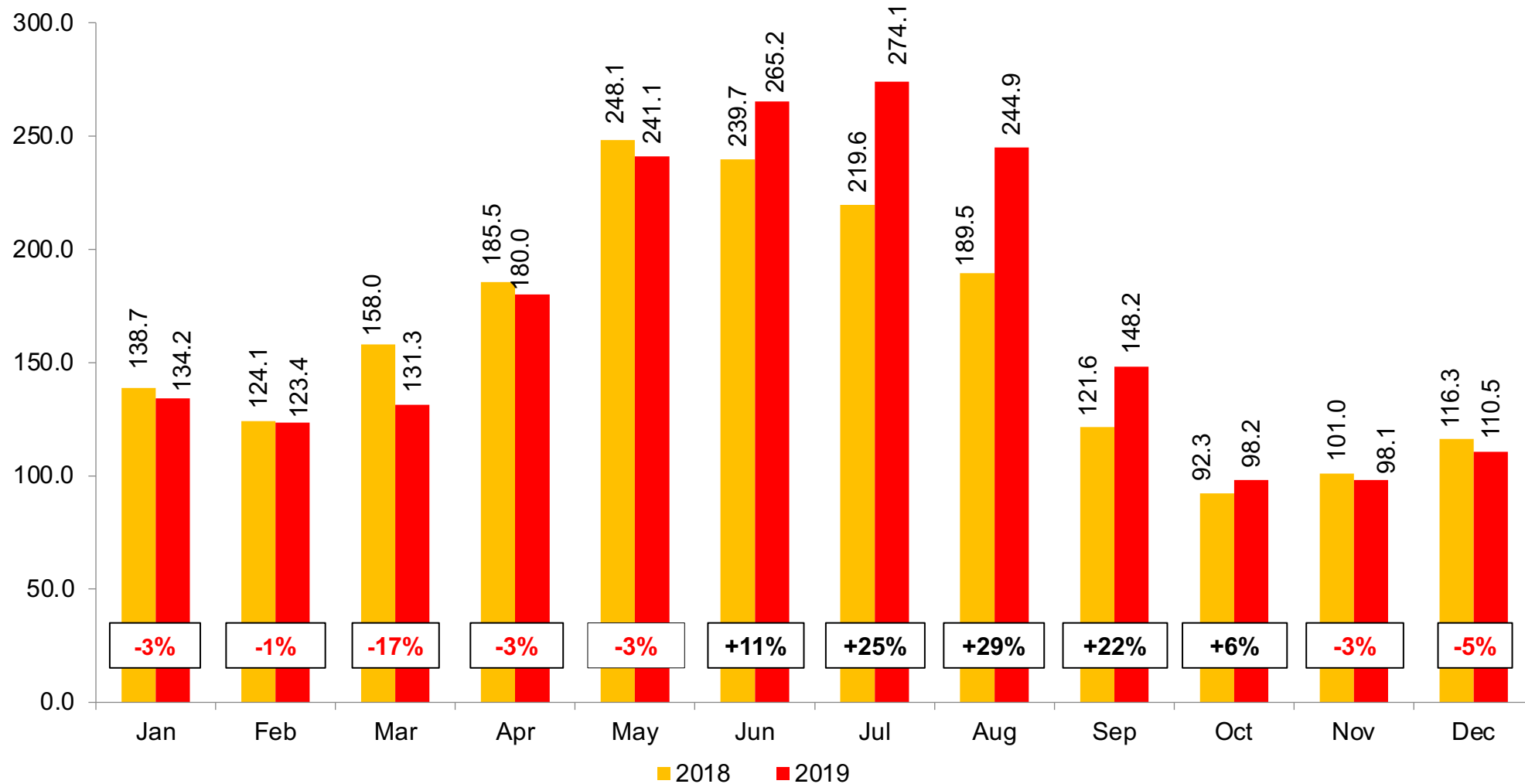
Legend	Total US
Dollars Contribution	0.52%
Dollars per Store/Week	\$212
Volume per Store/Week	227
Average Retail Price	\$0.94

MIDDLE ATLANTIC MONTHLY MANGO VOLUME (MILLIONS)

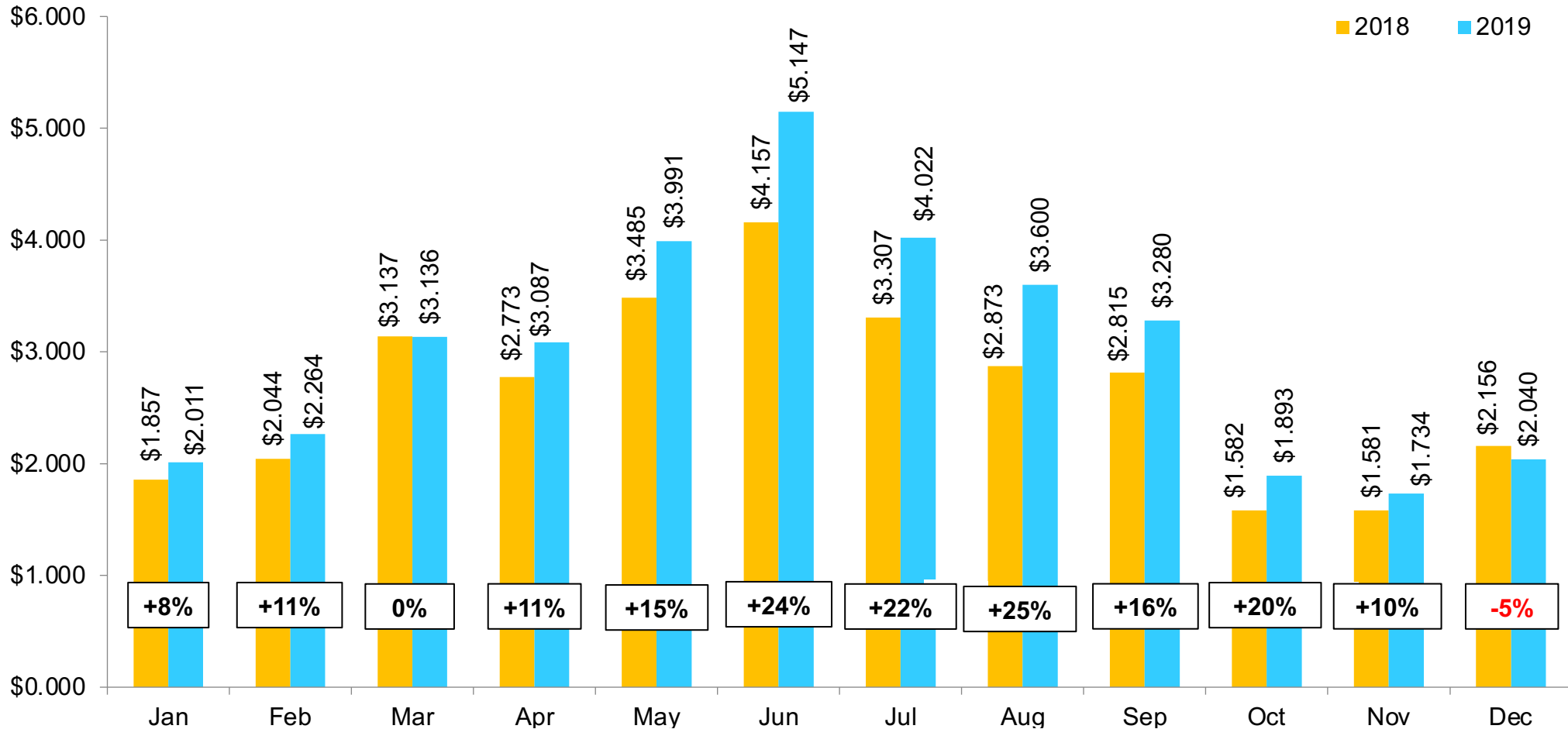


2019 MONTHLY VOLUME VELOCITY

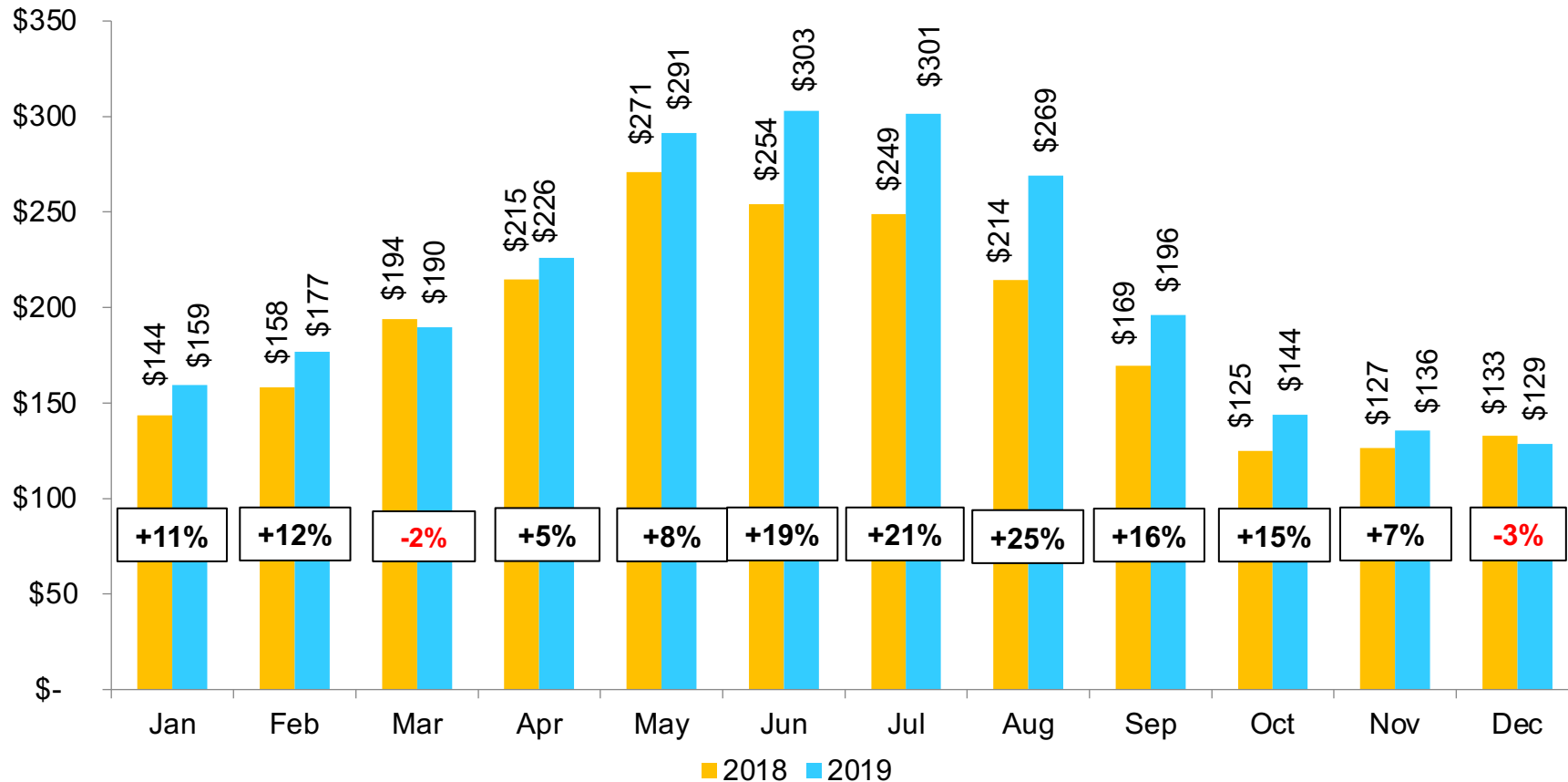
MIDDLE ATLANTIC MONTHLY MANGO VOLUME/STORE/WEEK



MIDDLE ATLANTIC MONTHLY MANGO SALES (MILLIONS)



MIDDLE ATLANTIC MONTHLY DOLLARS/STORE/WEEK



REGIONAL OVERVIEW 2019 / VOLUME / SALES VELOCITY & AVG. RETAIL PRICE

MOUNTAIN

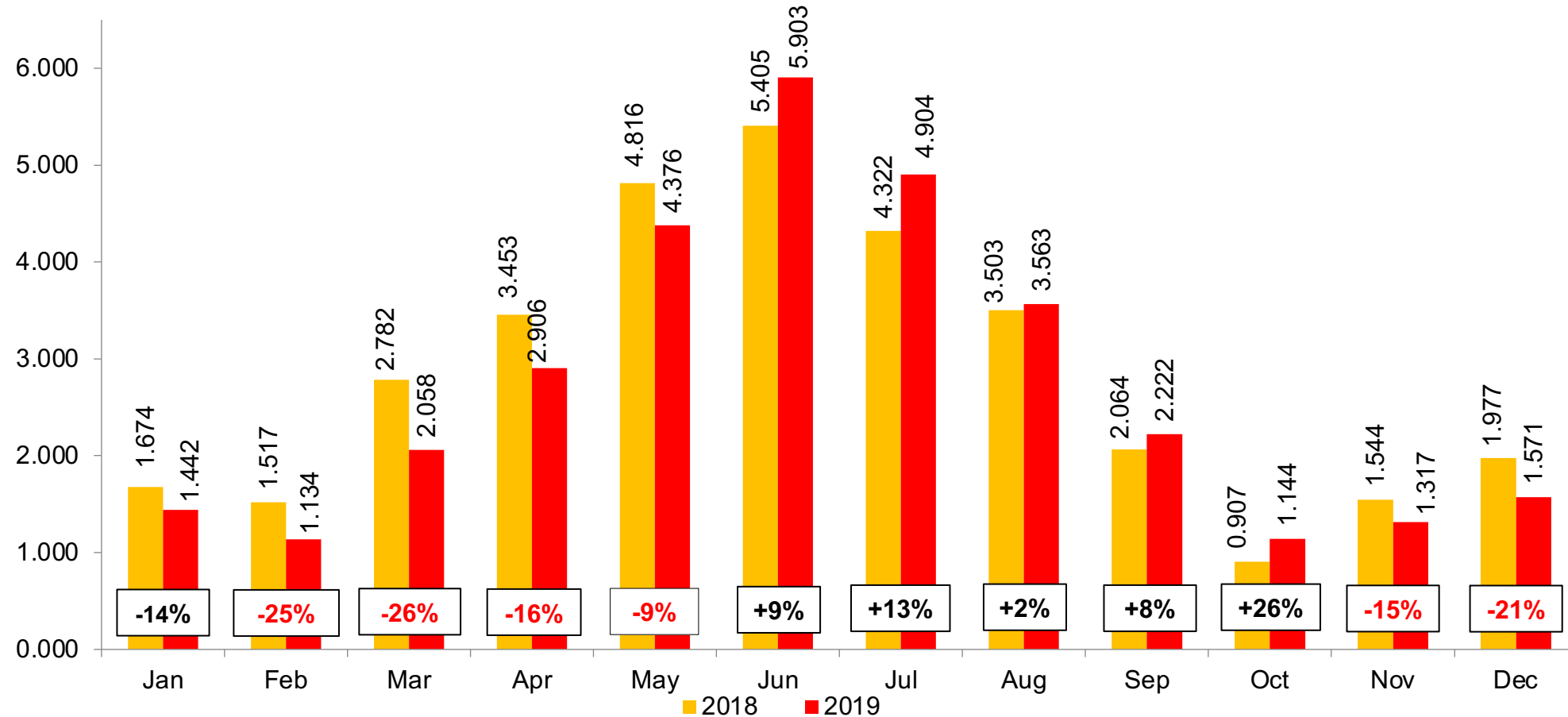
Nevada
Idaho
Utah
Wyoming
Montana
Colorado
Arizona
New Mexico



0.49%
\$229
295
\$.78

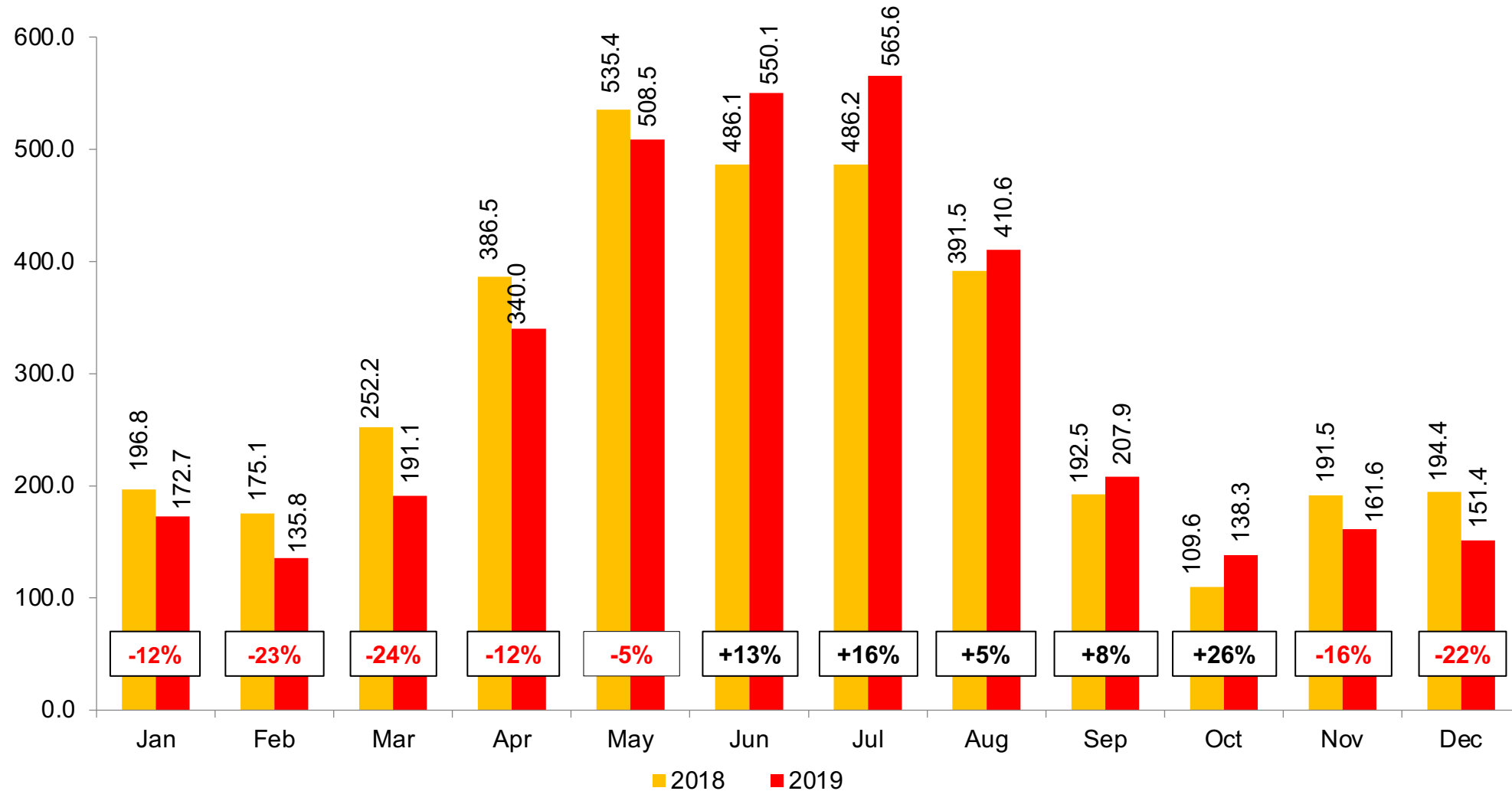
Legend	Total US
Dollars Contribution	0.52%
Dollars per Store/Week	\$212
Volume per Store/Week	227
Average Retail Price	\$0.94

MOUNTAIN MONTHLY MANGO VOLUME (MILLIONS)

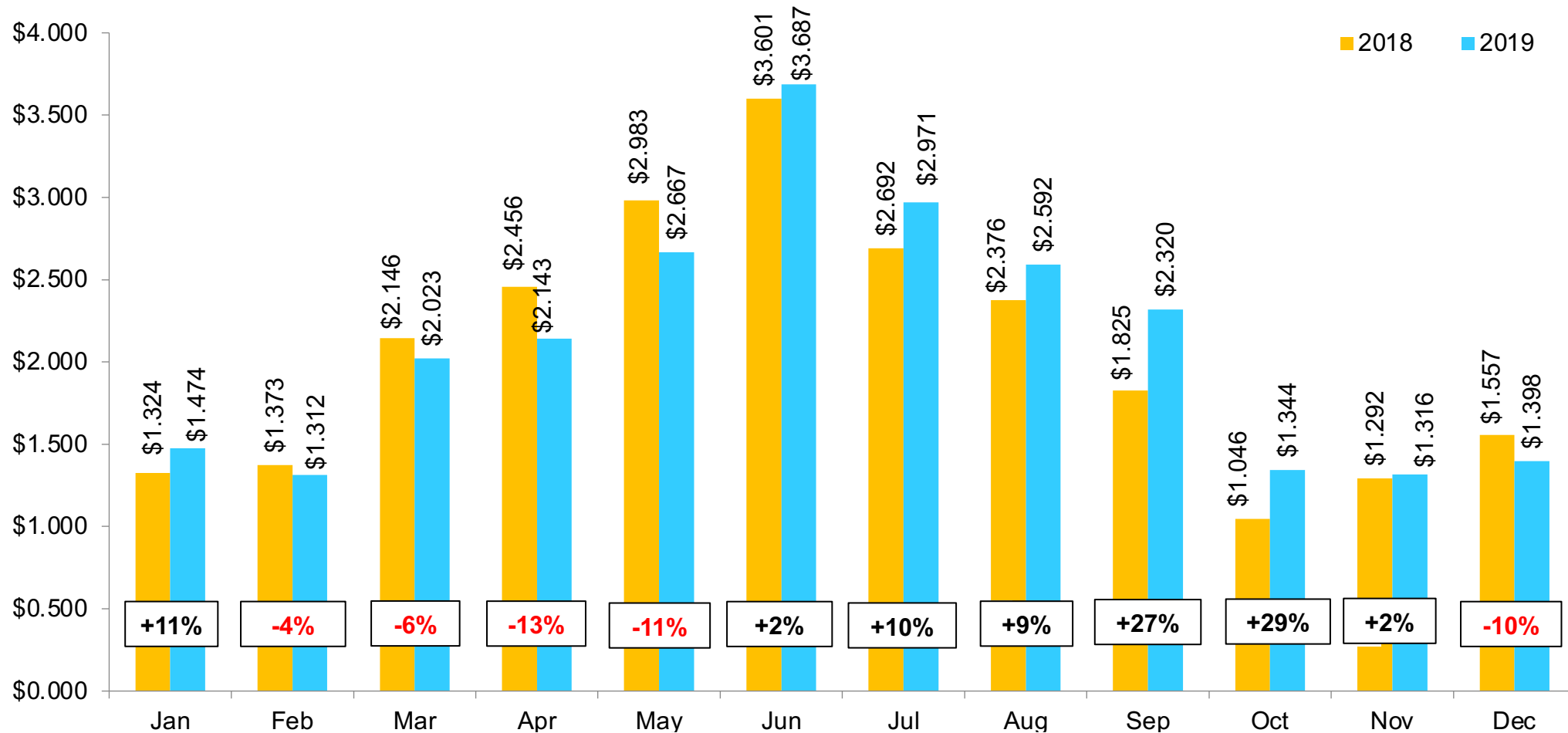


2019 MONTHLY VOLUME VELOCITY

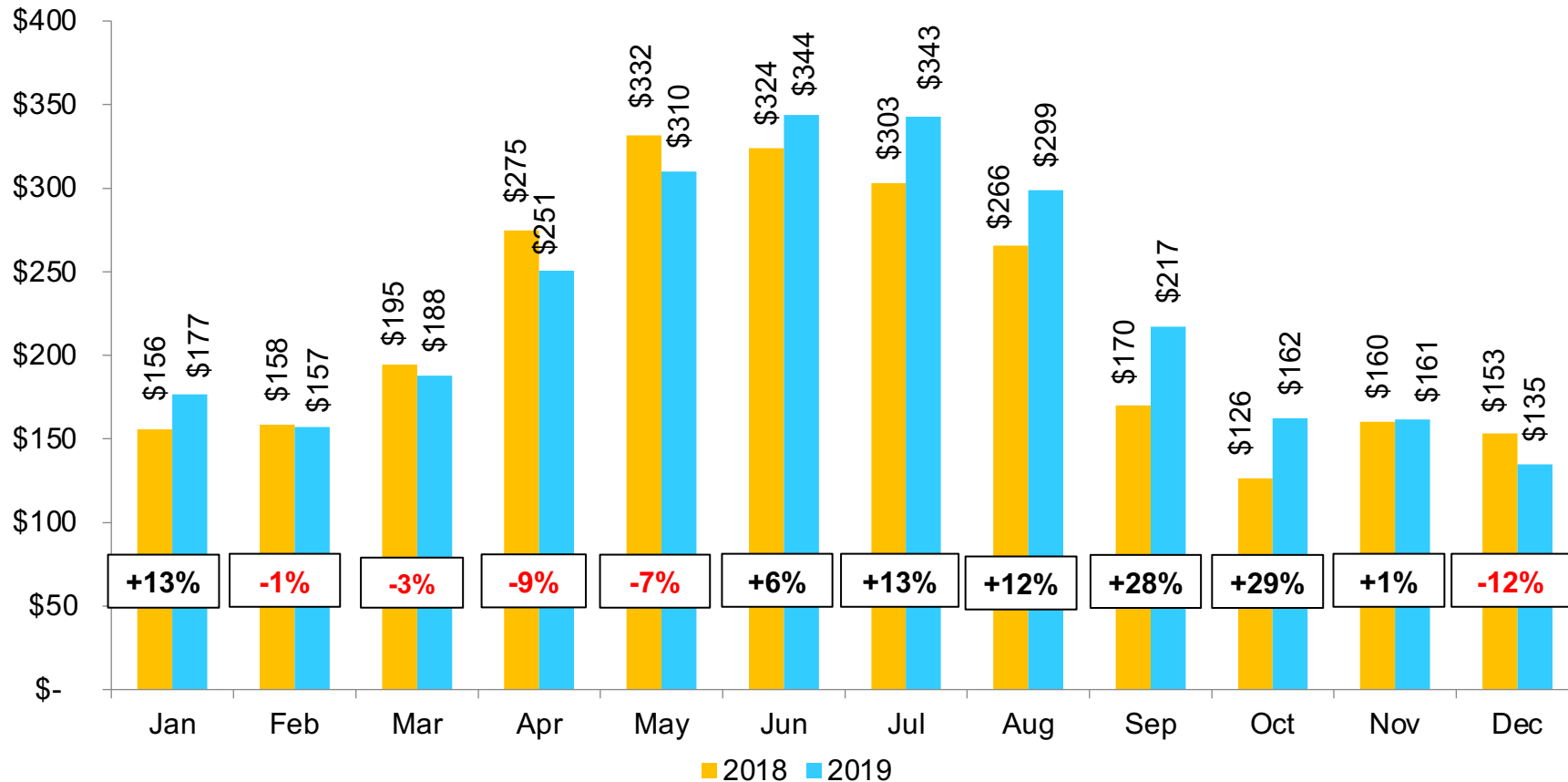
MOUNTAIN MONTHLY MANGO VOLUME/STORE/WEEK



MOUNTAIN MONTHLY MANGO SALES (MILLIONS)



MOUNTAIN MONTHLY DOLLARS/STORE/WEEK



REGIONAL OVERVIEW 2019 / VOLUME / SALES VELOCITY & AVG. RETAIL PRICE

NEW ENGLAND

Maine

New Hampshire

Connecticut

Massachusetts

Vermont

Delaware

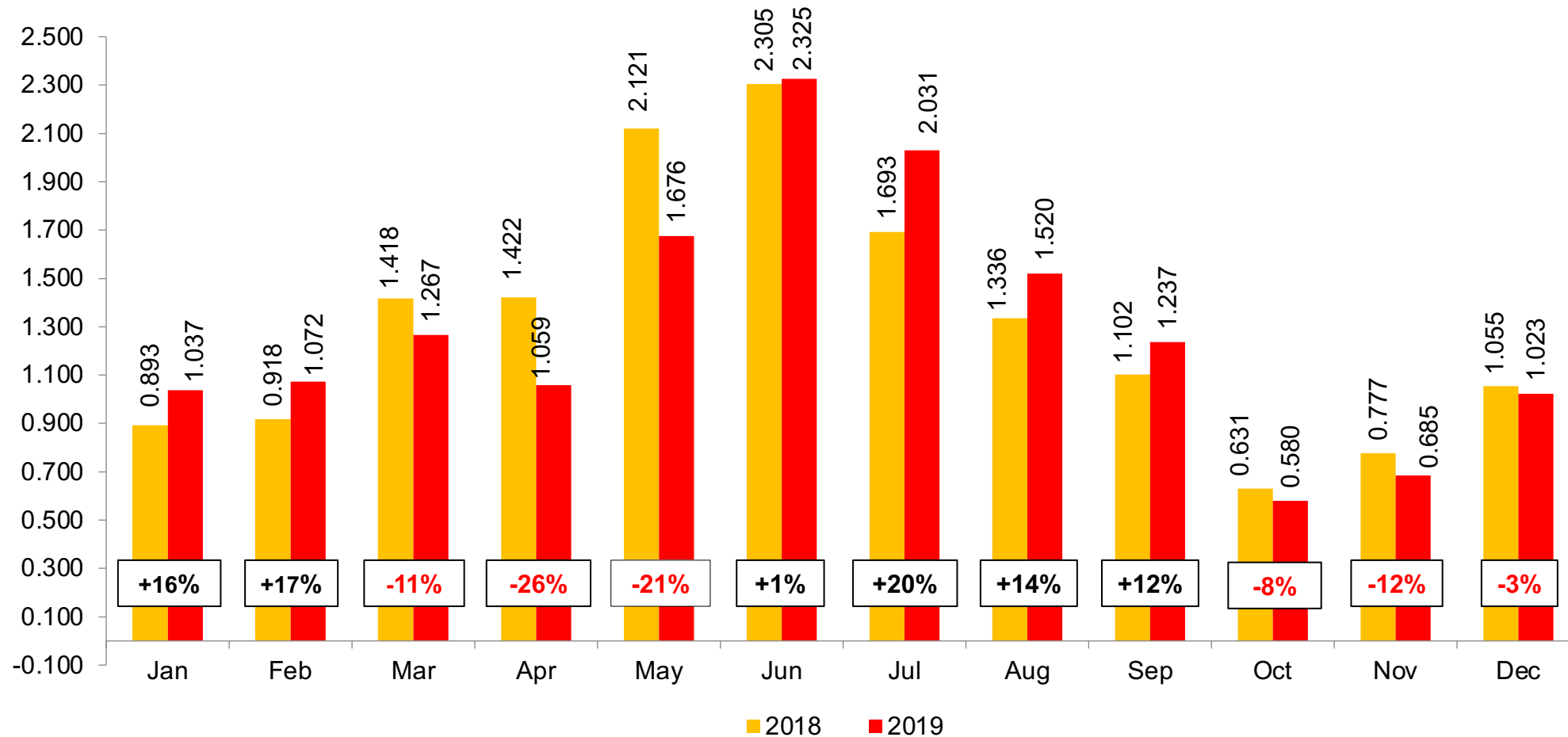
Rhode Island



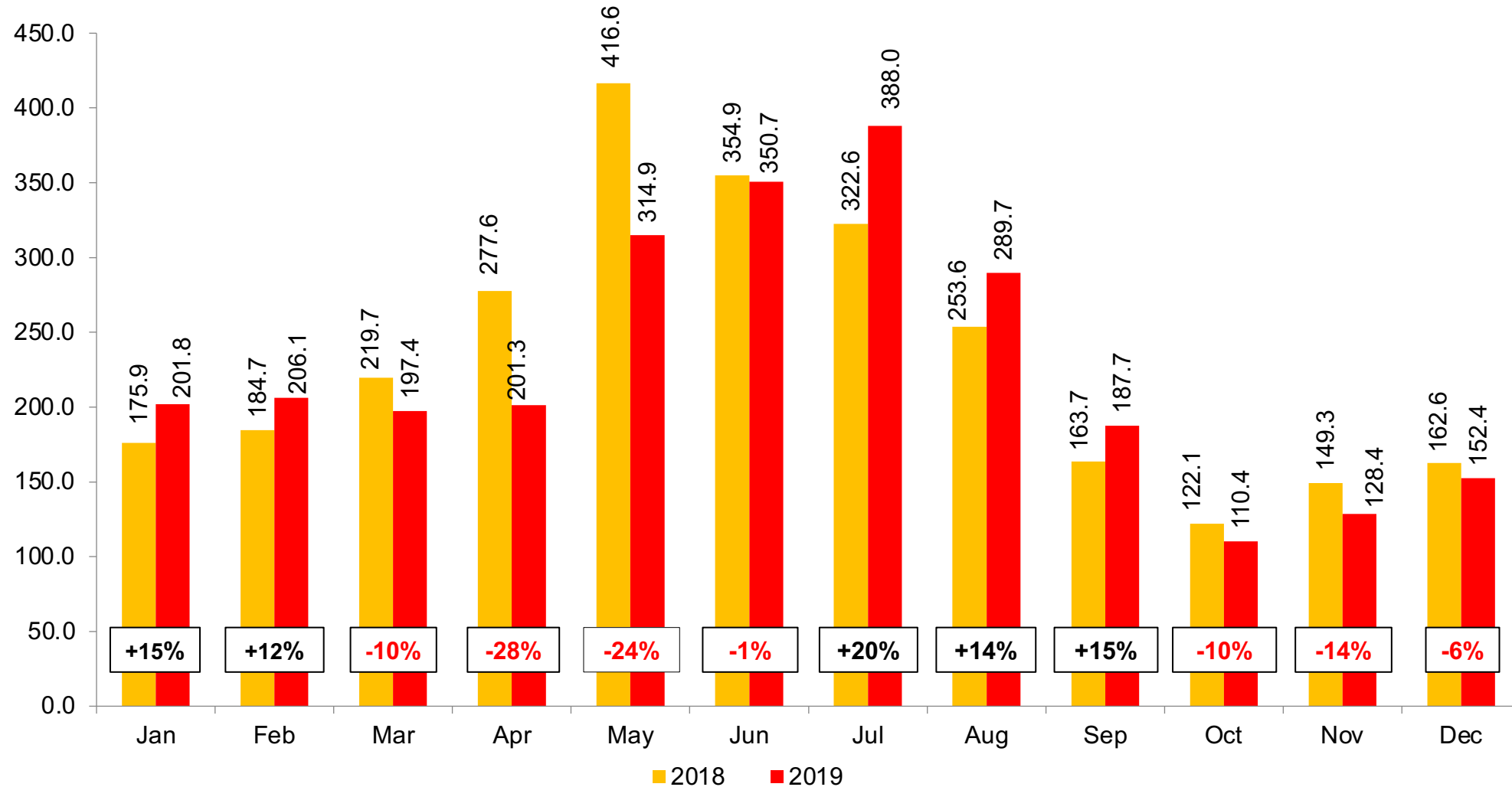
0.44%
\$268
226
\$1.19

Legend	Total US
Dollars Contribution	0.52%
Dollars per Store/Week	\$212
Volume per Store/Week	227
Average Retail Price	\$0.94

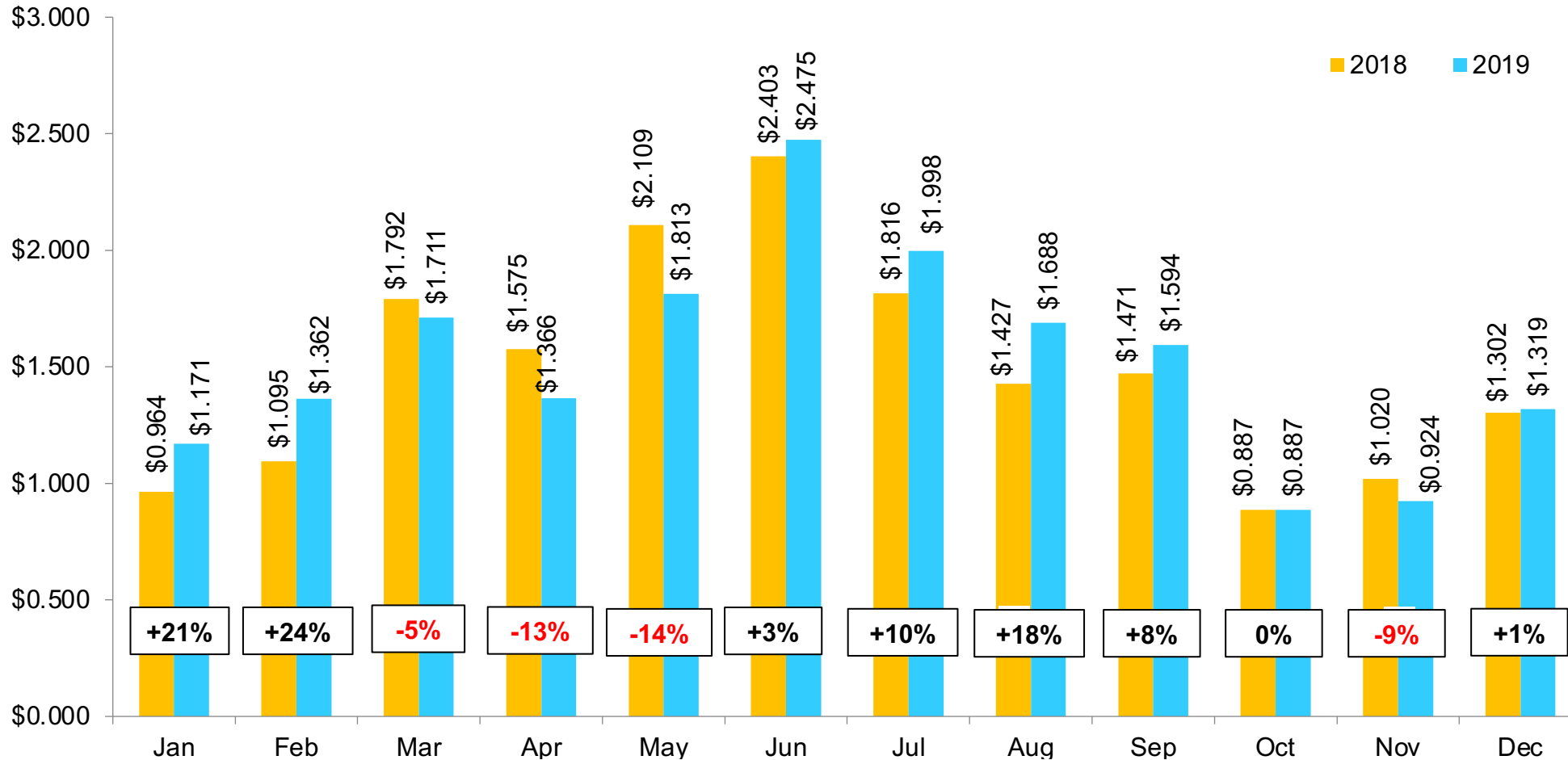
NEW ENGLAND MONTHLY MANGO VOLUME (MILLIONS)



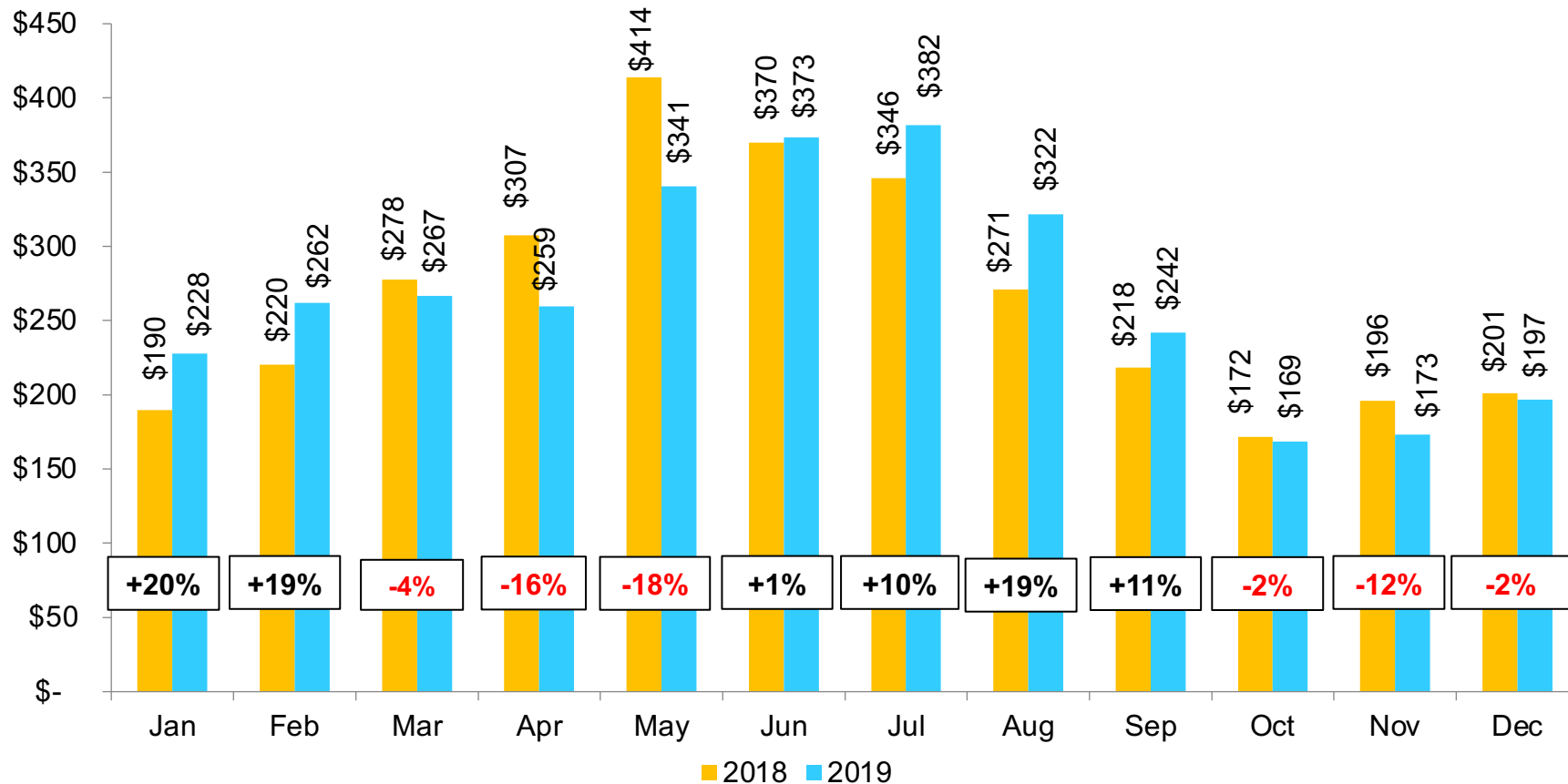
NEW ENGLAND MONTHLY MANGO VOLUME/STORE/WEEK



NEW ENGLAND MONTHLY MANGO SALES (MILLIONS)



NEW ENGLAND MONTHLY DOLLARS/STORE/WEEK



REGIONAL OVERVIEW 2019 / VOLUME / SALES VELOCITY & AVG. RETAIL PRICE

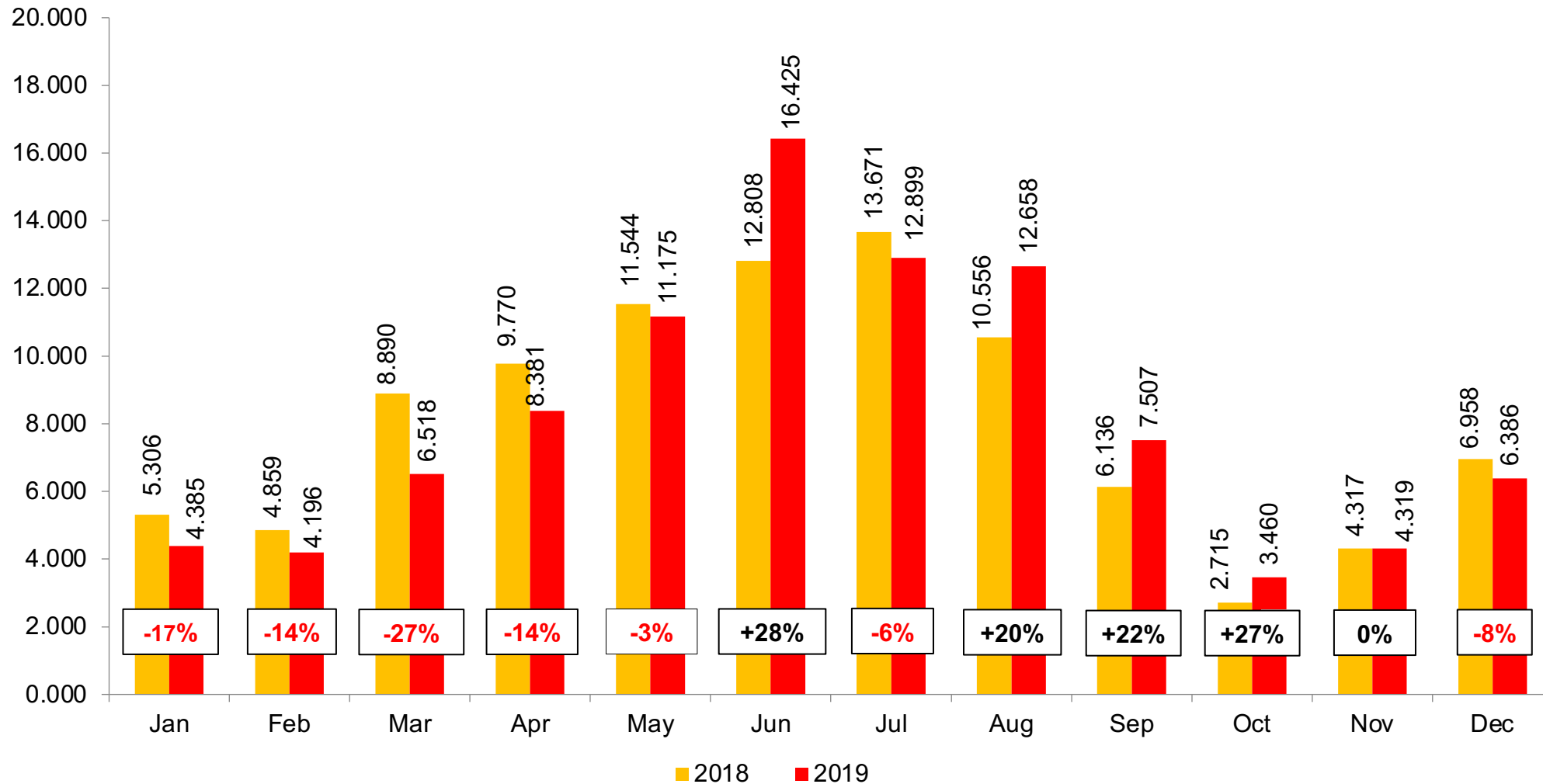
PACIFIC
California
Washington
Oregon



0.78%
\$374
447
\$.84

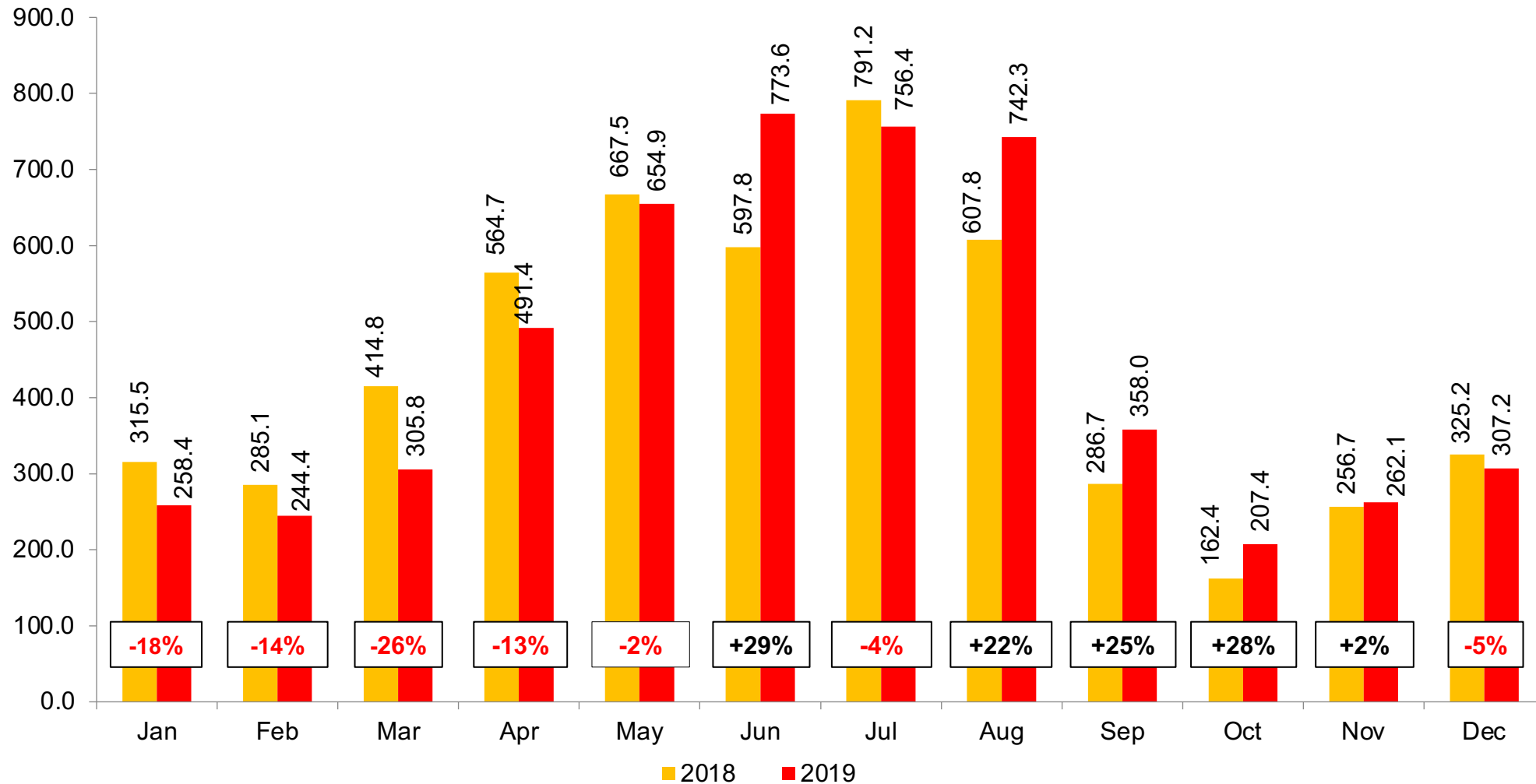
Legend	Total US
Dollars Contribution	0.52%
Dollars per Store/Week	\$212
Volume per Store/Week	227
Average Retail Price	\$0.94

PACIFIC MONTHLY MANGO VOLUME (MILLIONS)



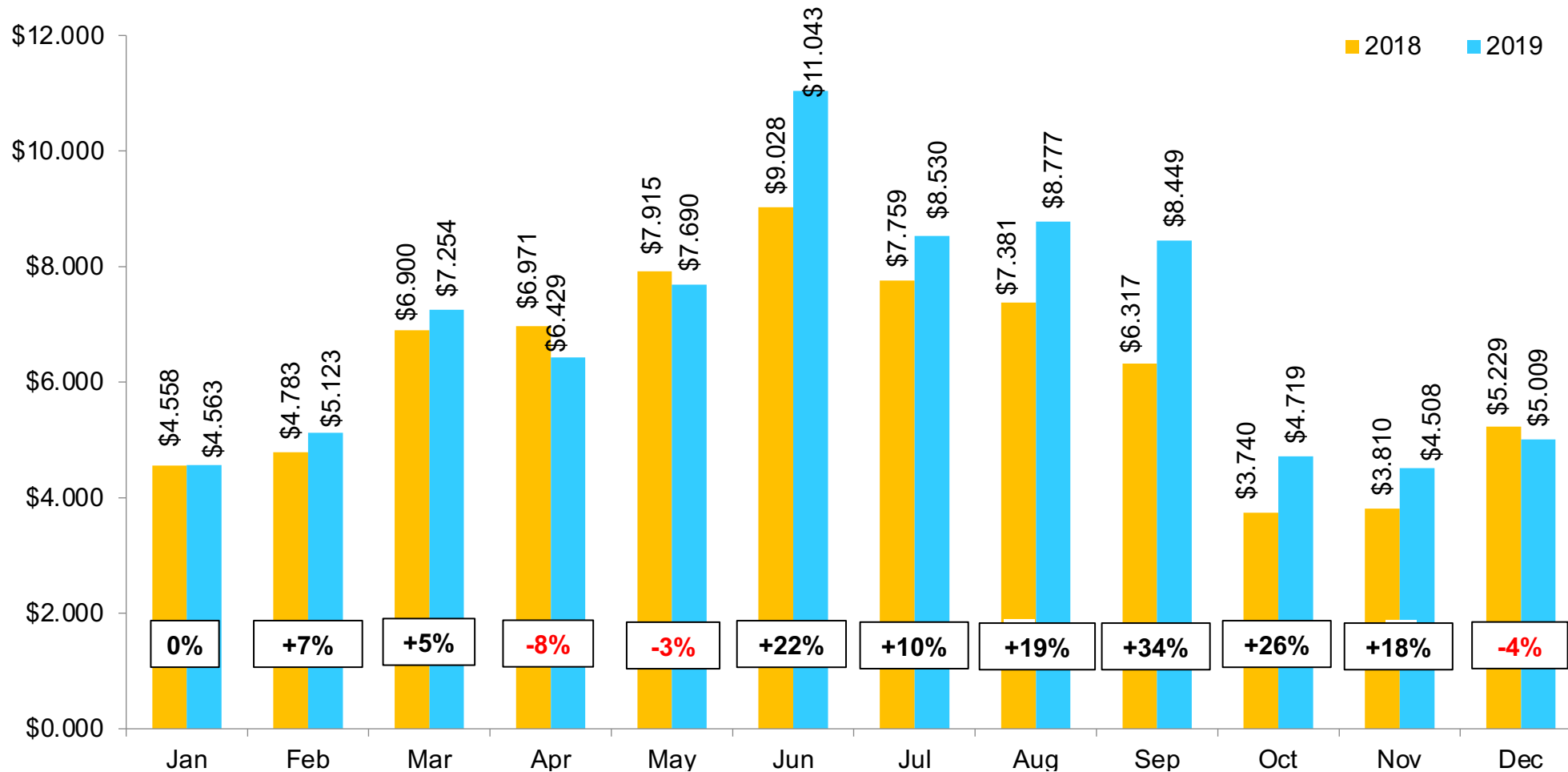
2019 MONTHLY VOLUME VELOCITY

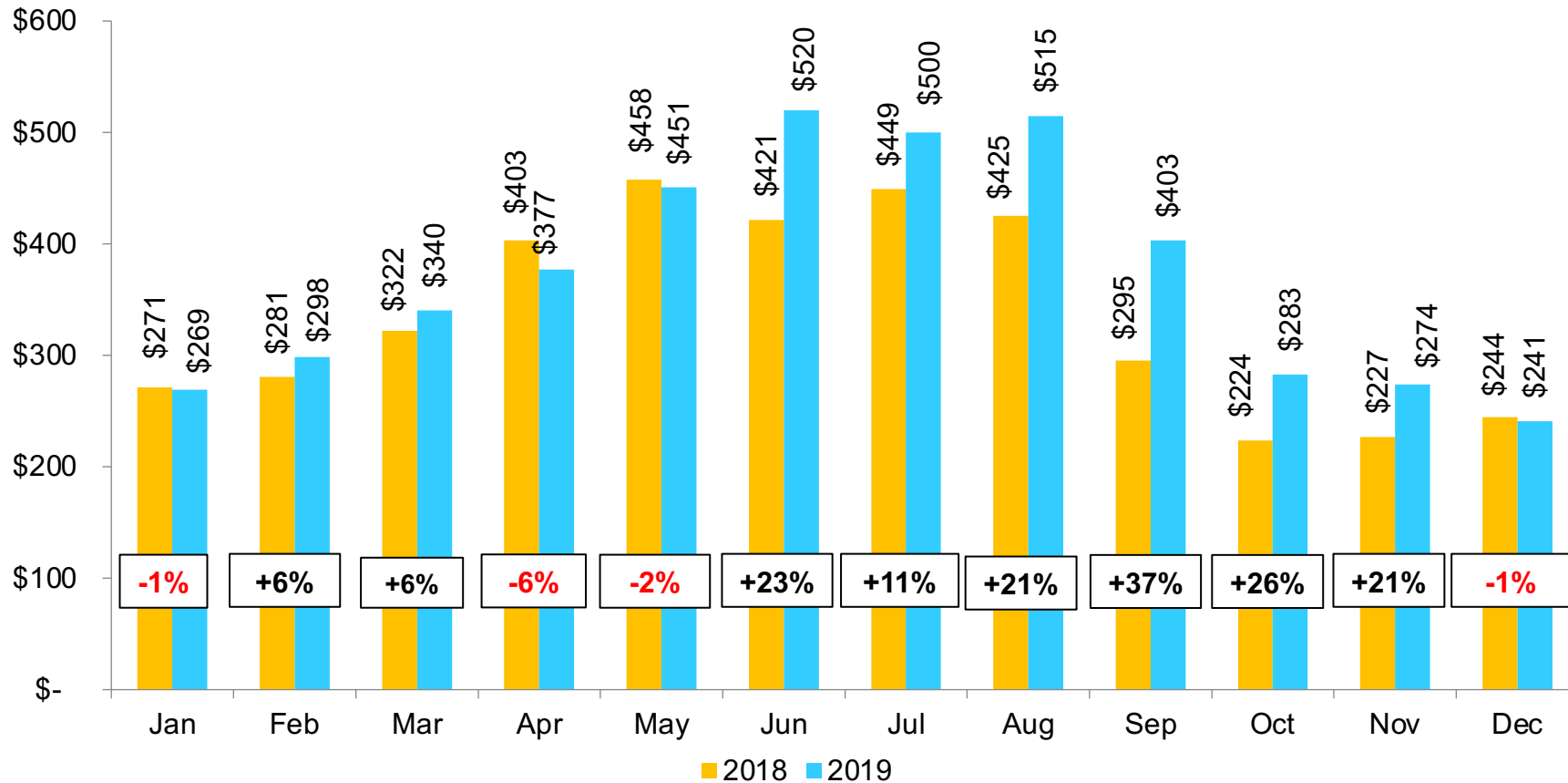
PACIFIC MONTHLY MANGO VOLUME/STORE/WEEK



PACIFIC

MONTHLY MANGO SALES (MILLIONS)





REGIONAL OVERVIEW 2019 / VOLUME/SALES VELOCITY & AVG. RETAIL PRICE

SOUTH ATLANTIC

Florida

Georgia

South Carolina

North Carolina

West Virginia

Virginia

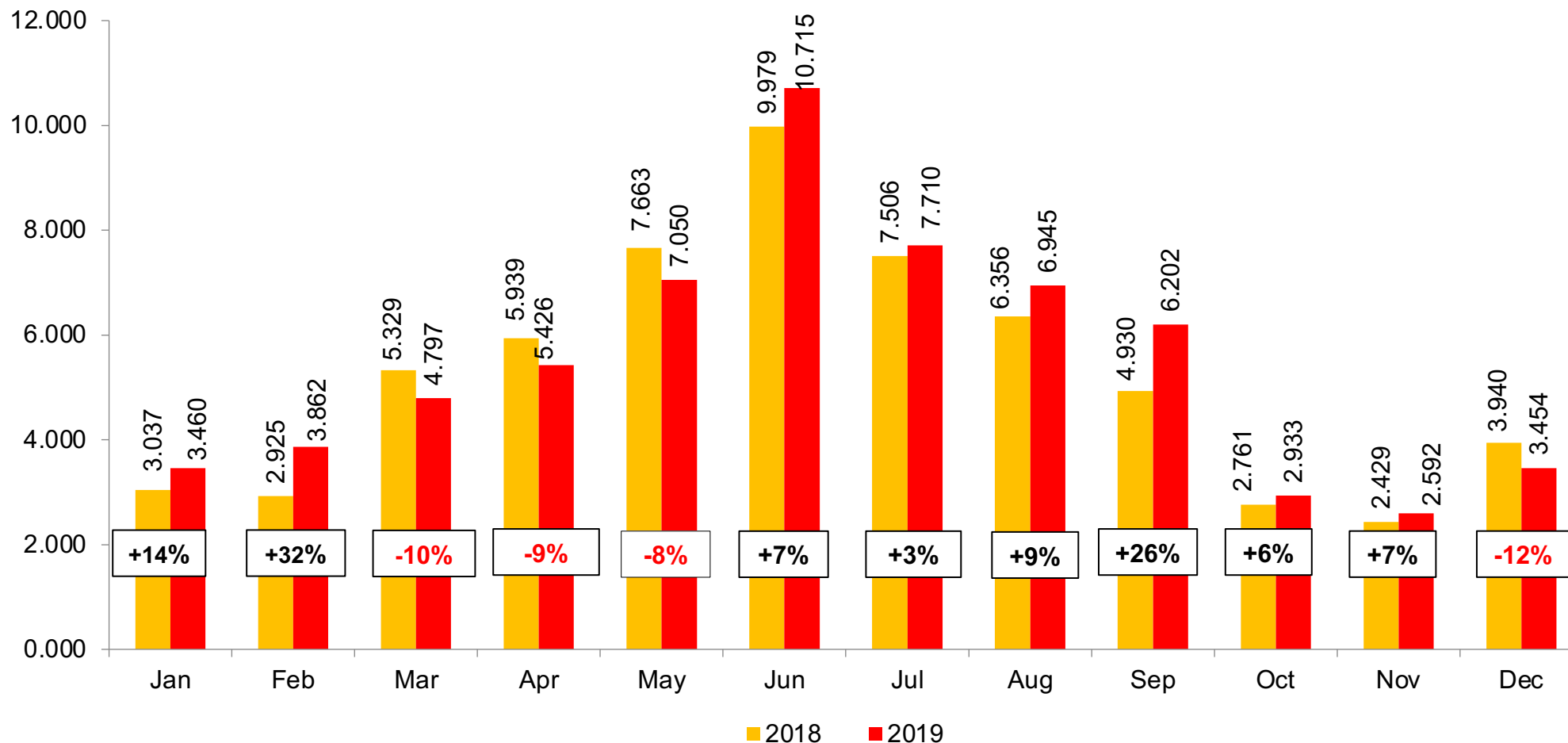
Maryland



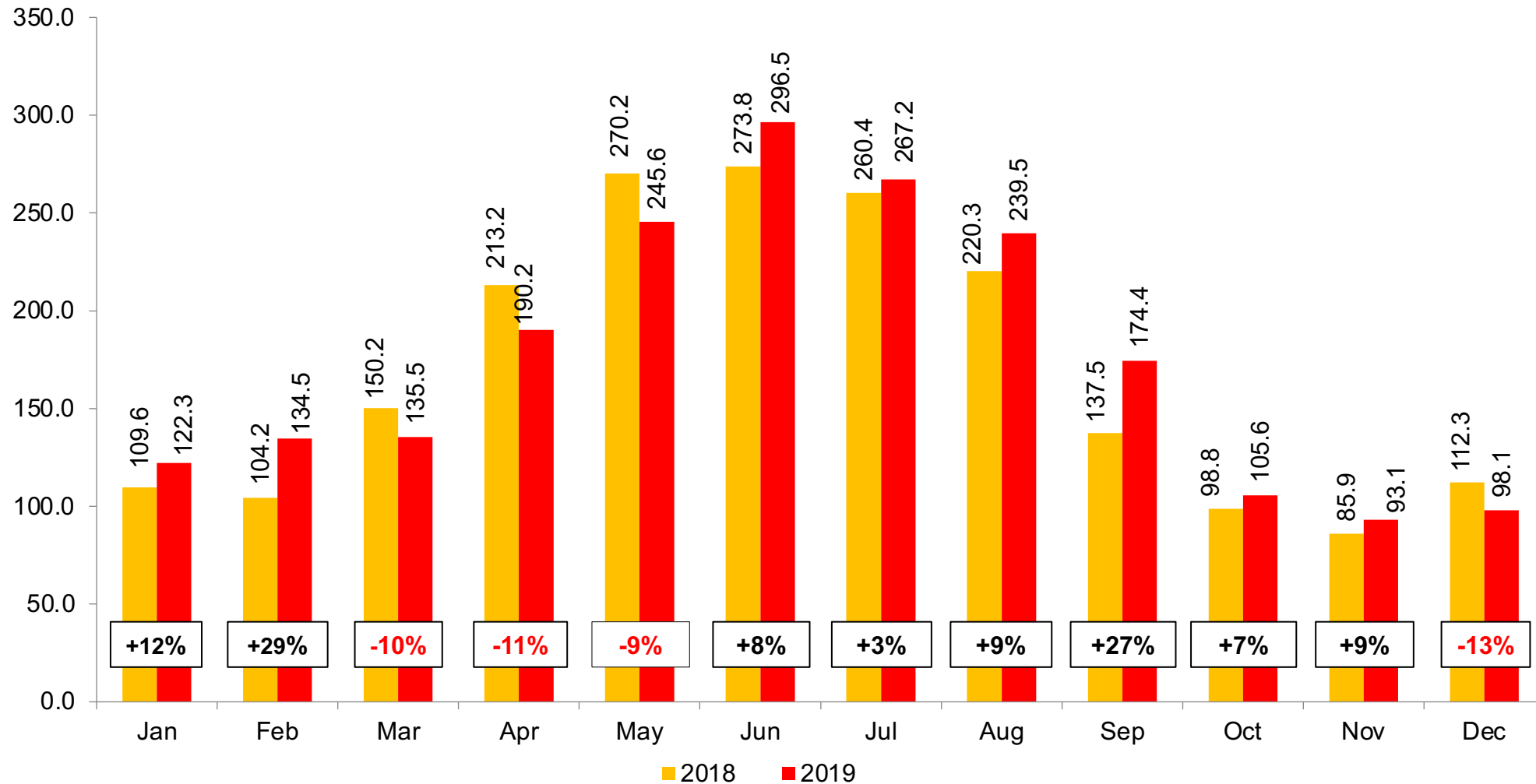
0.51%
\$189
176
\$1.08

Legend	Total US
Dollars Contribution	0.52%
Dollars per Store/Week	\$212
Volume per Store/Week	227
Average Retail Price	\$0.94

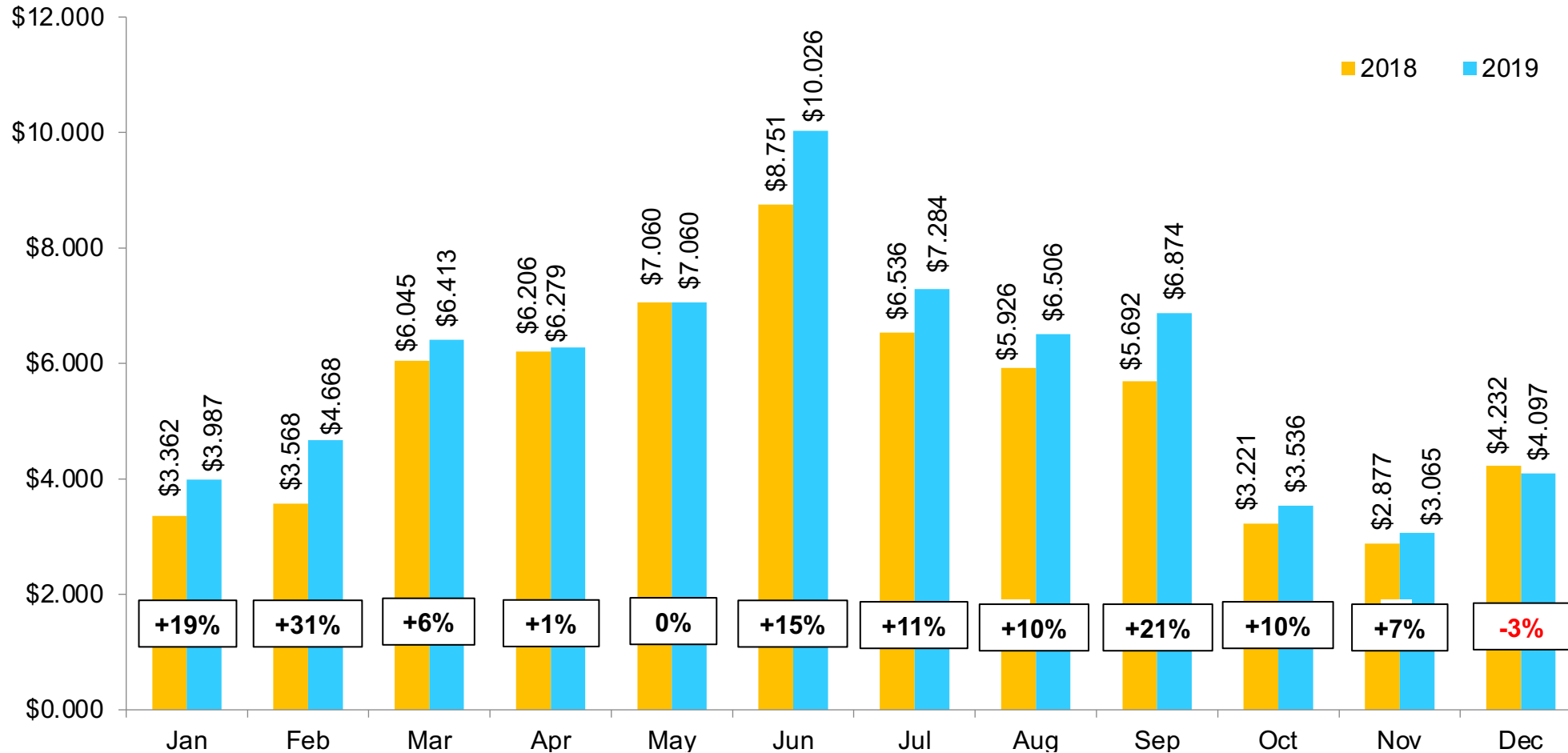
SOUTH ATLANTIC MONTHLY MANGO VOLUME (MILLIONS)



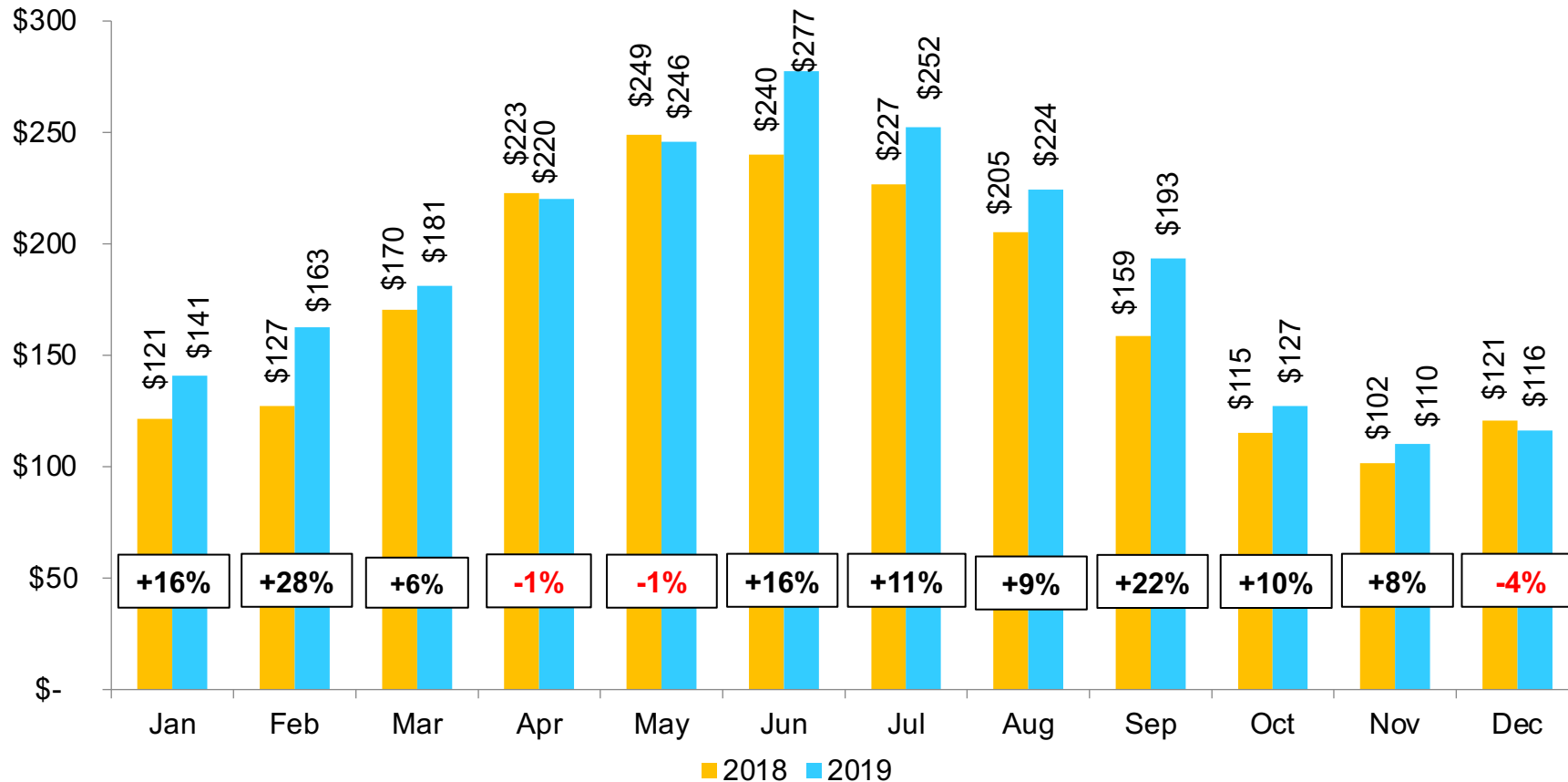
SOUTH ATLANTIC MONTHLY MANGO VOLUME/STORE/WEEK



SOUTH ATLANTIC MONTHLY MANGO SALES (MILLIONS)



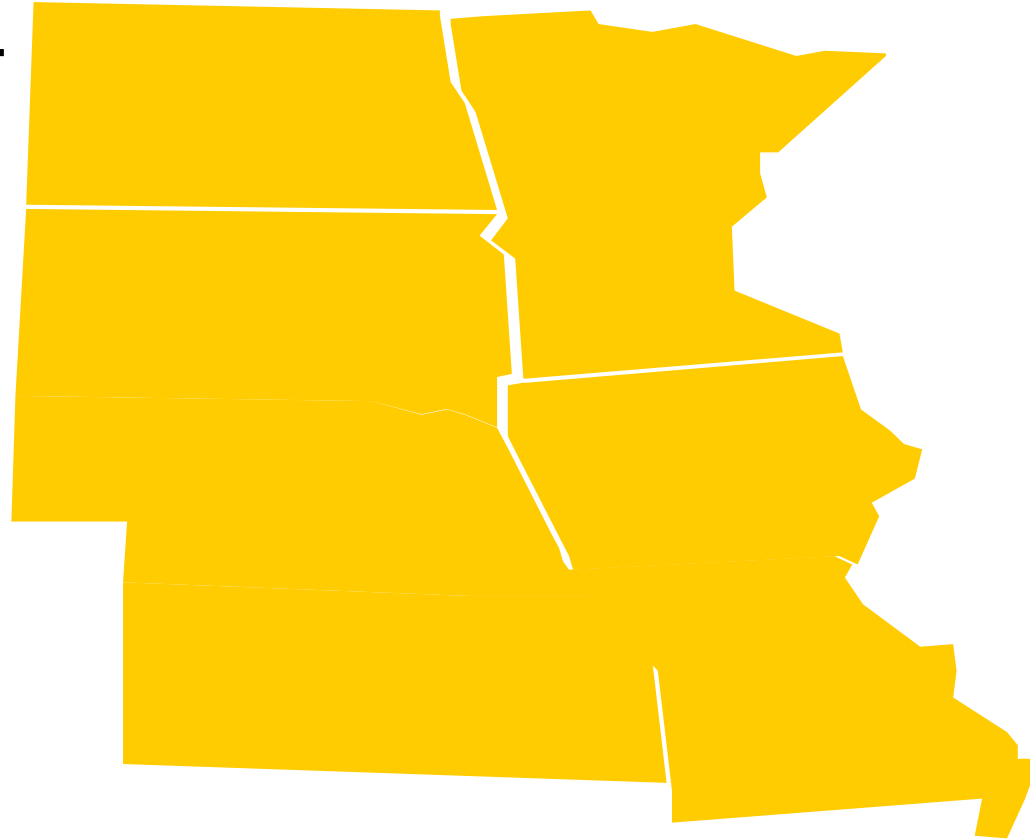
SOUTH ATLANTIC MONTHLY DOLLARS/STORE/WEEK



REGIONAL OVERVIEW 2019 / VOLUME / SALES VELOCITY & AVG. RETAIL PRICE

WEST NORTH CENTRAL

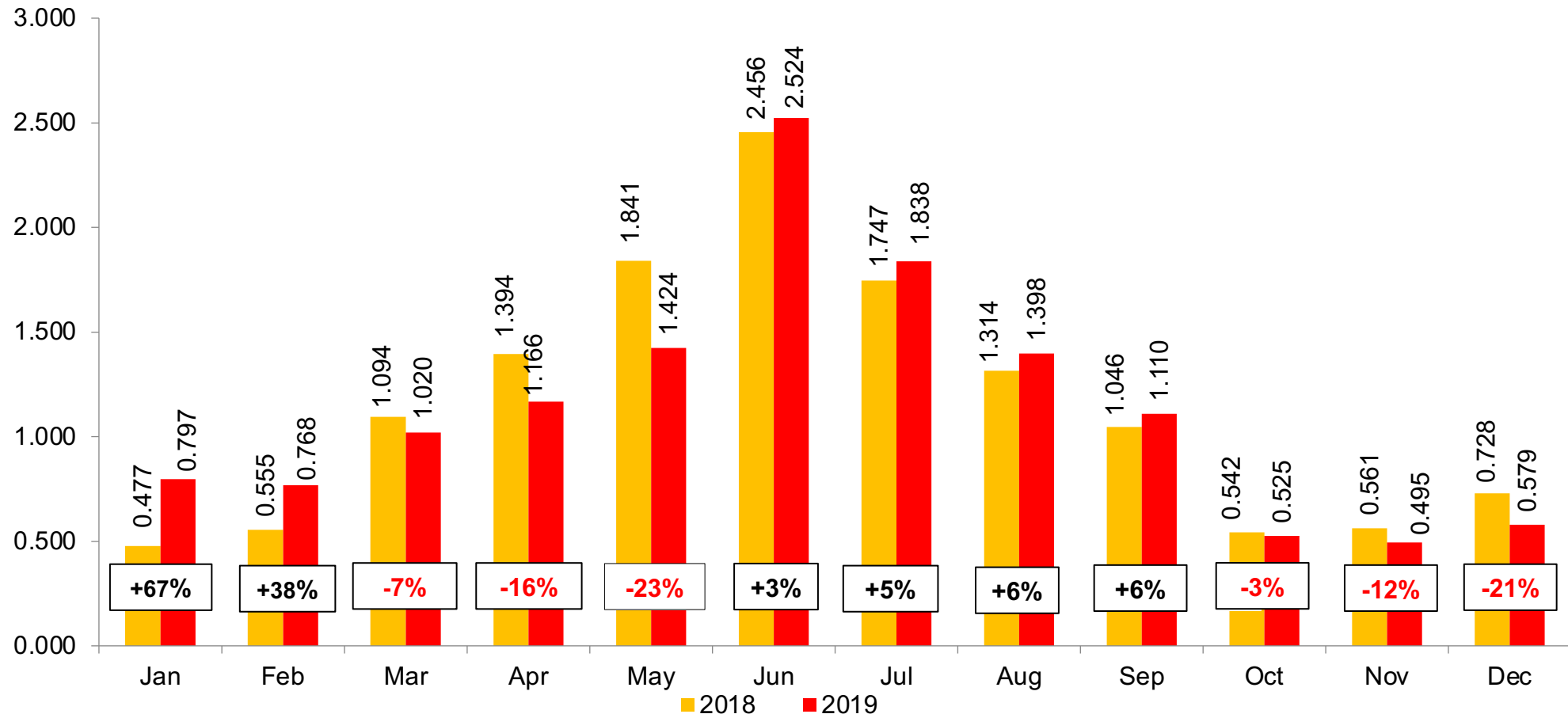
North Dakota
South Dakota
Nebraska
Kansas
Minnesota
Iowa
Missouri



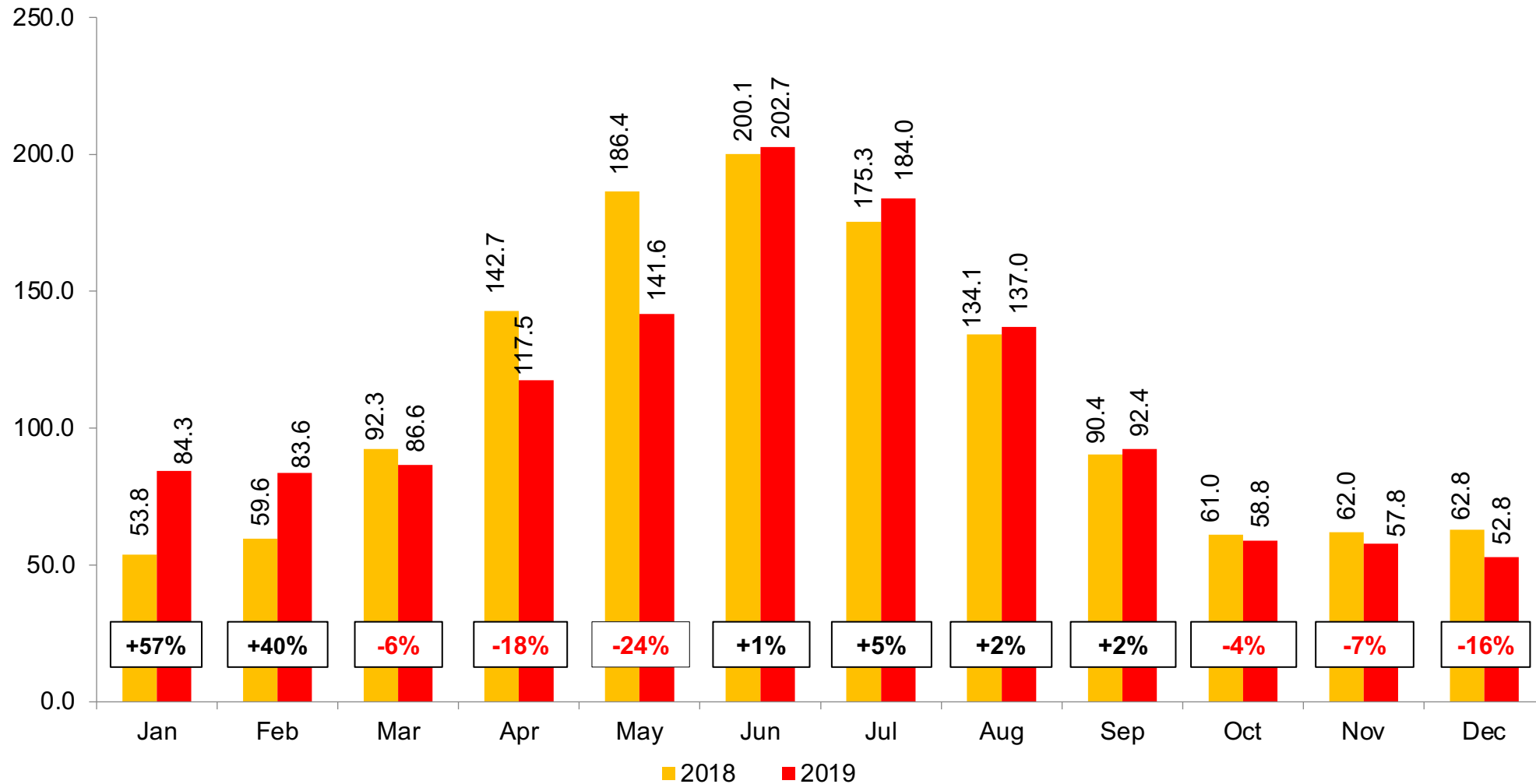
0.34%
\$113
110
\$1.02

Legend	Total US
Dollars Contribution	0.52%
Dollars per Store/Week	\$212
Volume per Store/Week	227
Average Retail Price	\$0.94

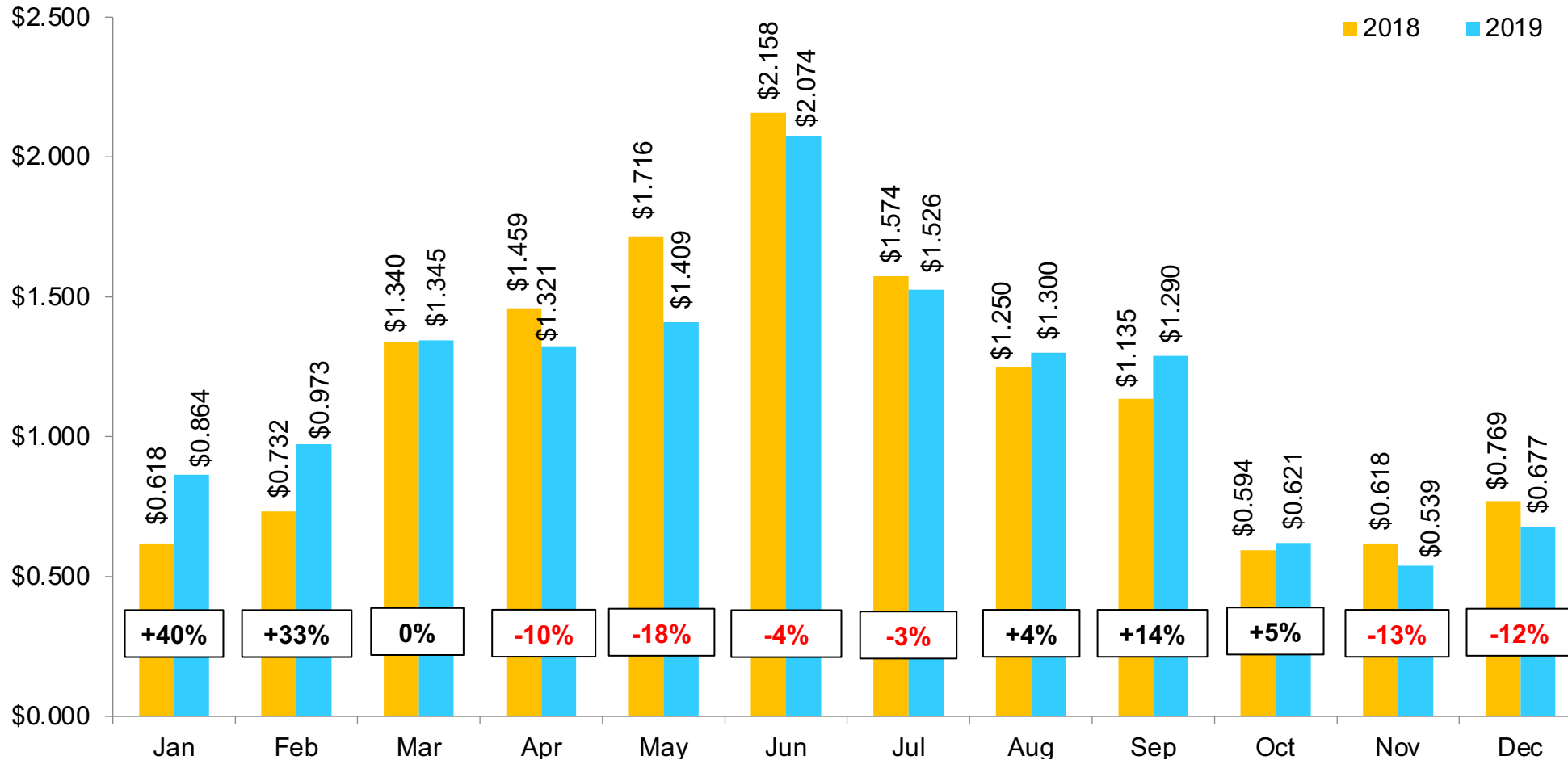
WEST NORTH CENTRAL MONTHLY MANGO VOLUME (MILLIONS)



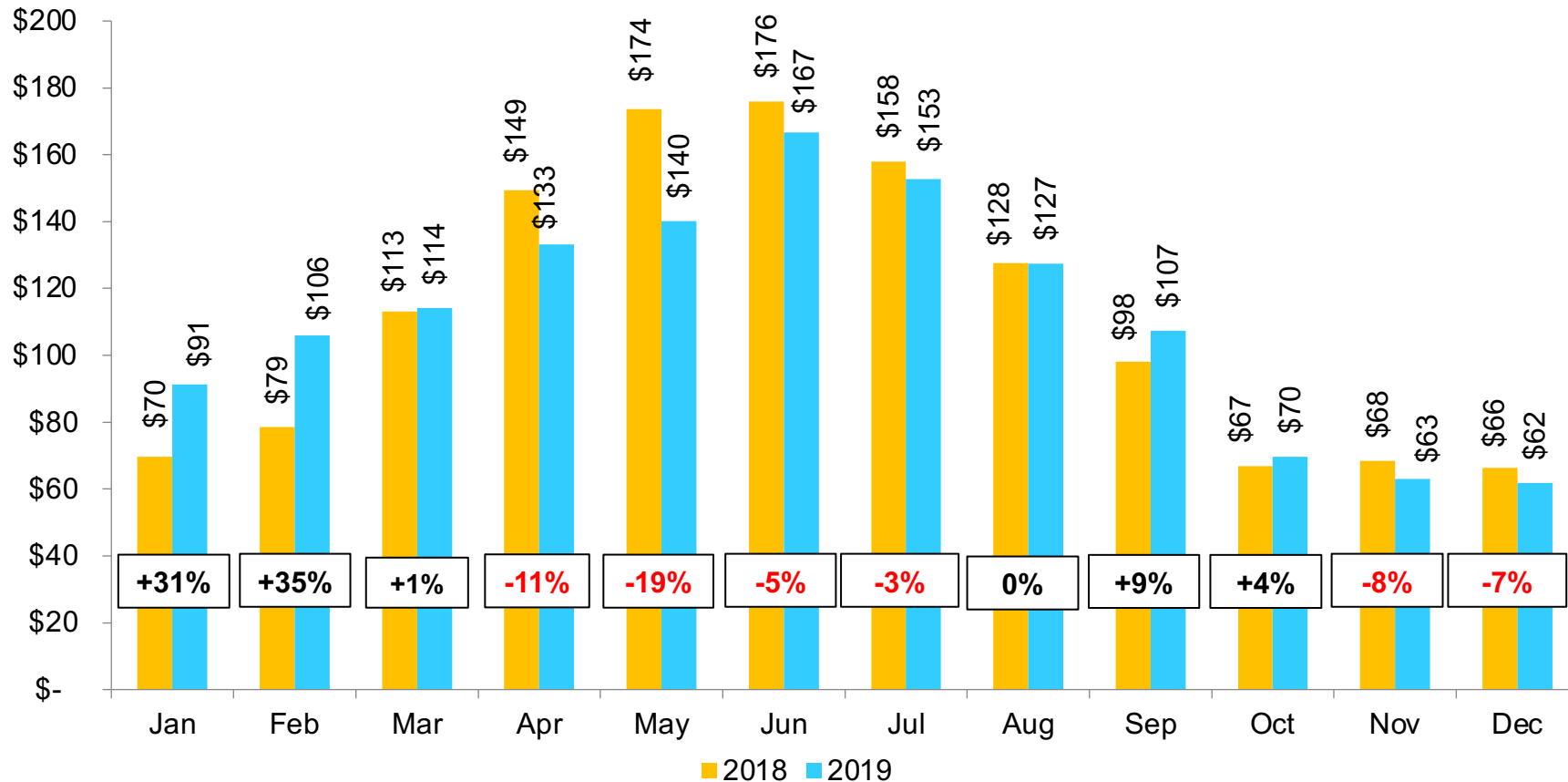
WEST NORTH CENTRAL MONTHLY MANGO VOLUME/STORE/WEEK



WEST NORTH CENTRAL MONTHLY MANGO SALES (MILLIONS)



WEST NORTH CENTRAL MONTHLY DOLLARS/STORE/WEEK



REGIONAL OVERVIEW 2019 / VOLUME / SALES VELOCITY & AVG. RETAIL PRICE

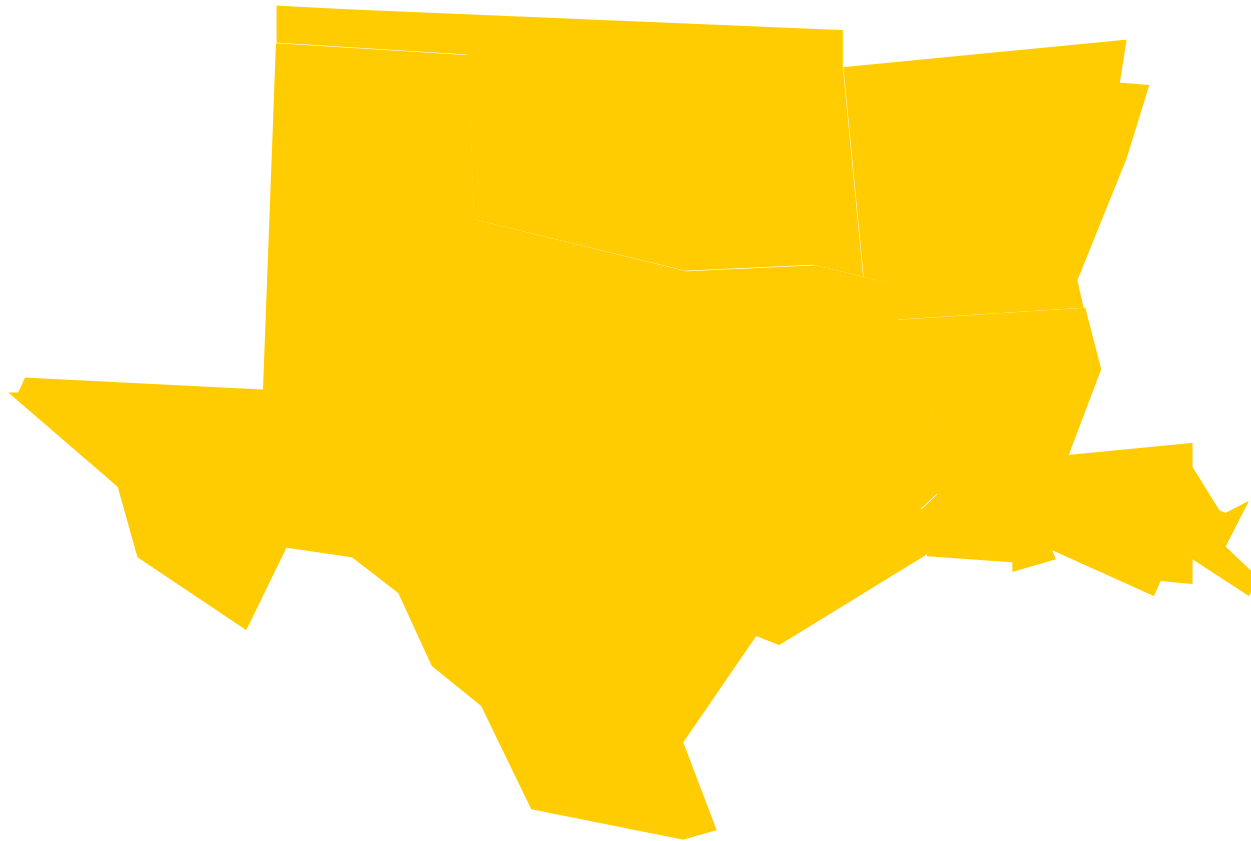
WEST SOUTH CENTRAL

Oklahoma

Texas

Arkansas

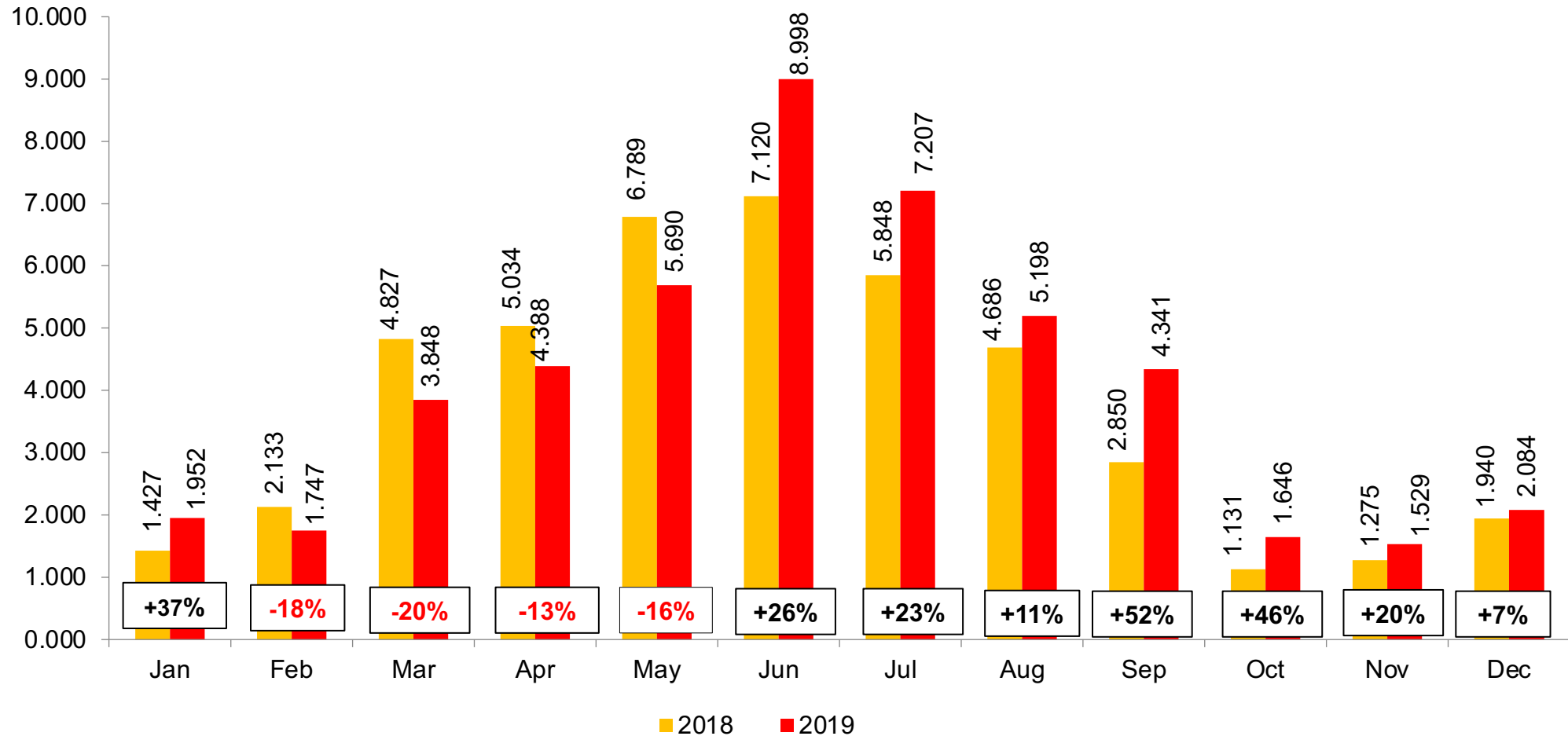
Louisiana



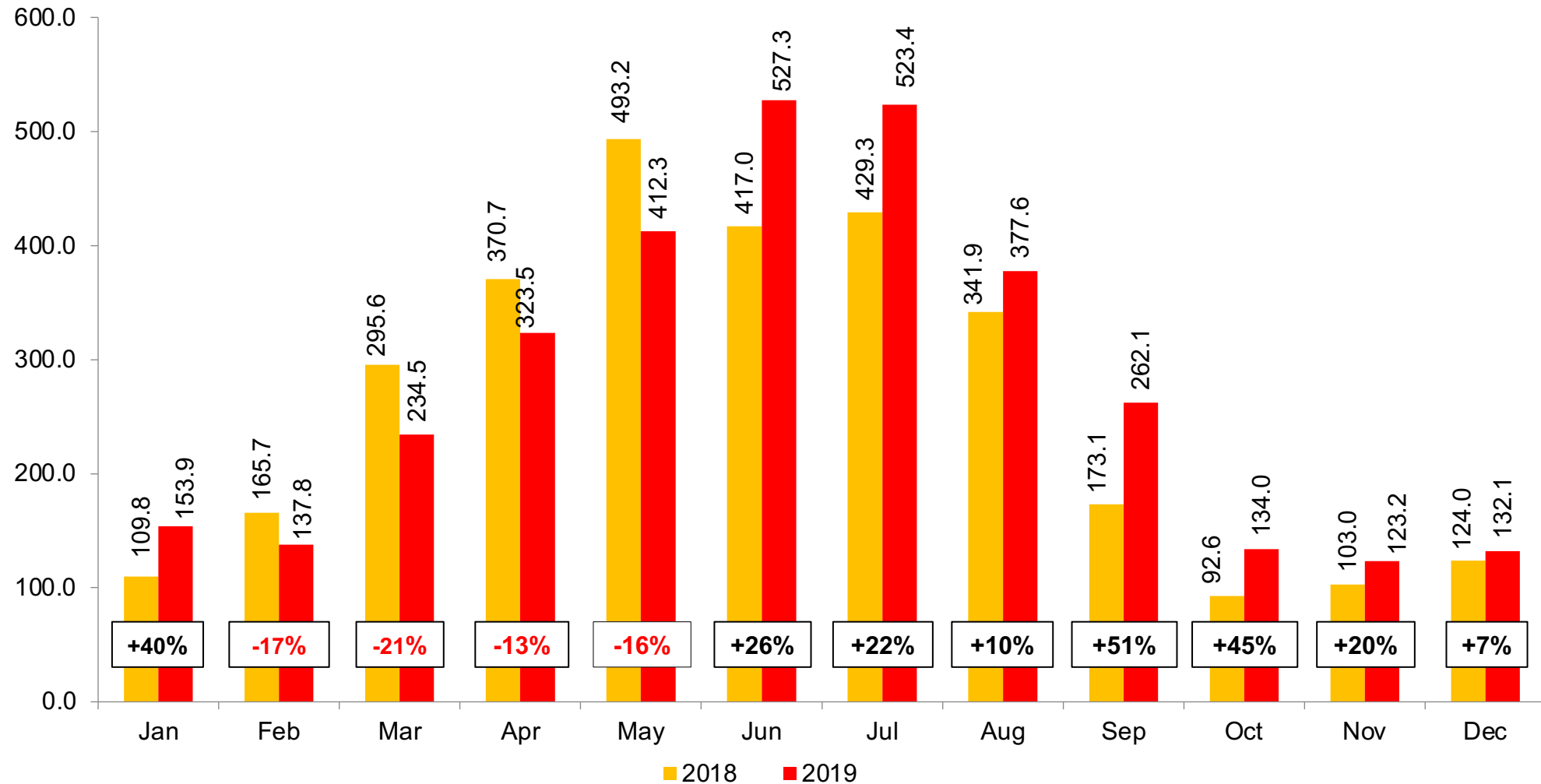
0.62%
\$214
285
\$.75

Legend	Total US
Dollars Contribution	0.52%
Dollars per Store/Week	\$212
Volume per Store/Week	227
Average Retail Price	\$0.94

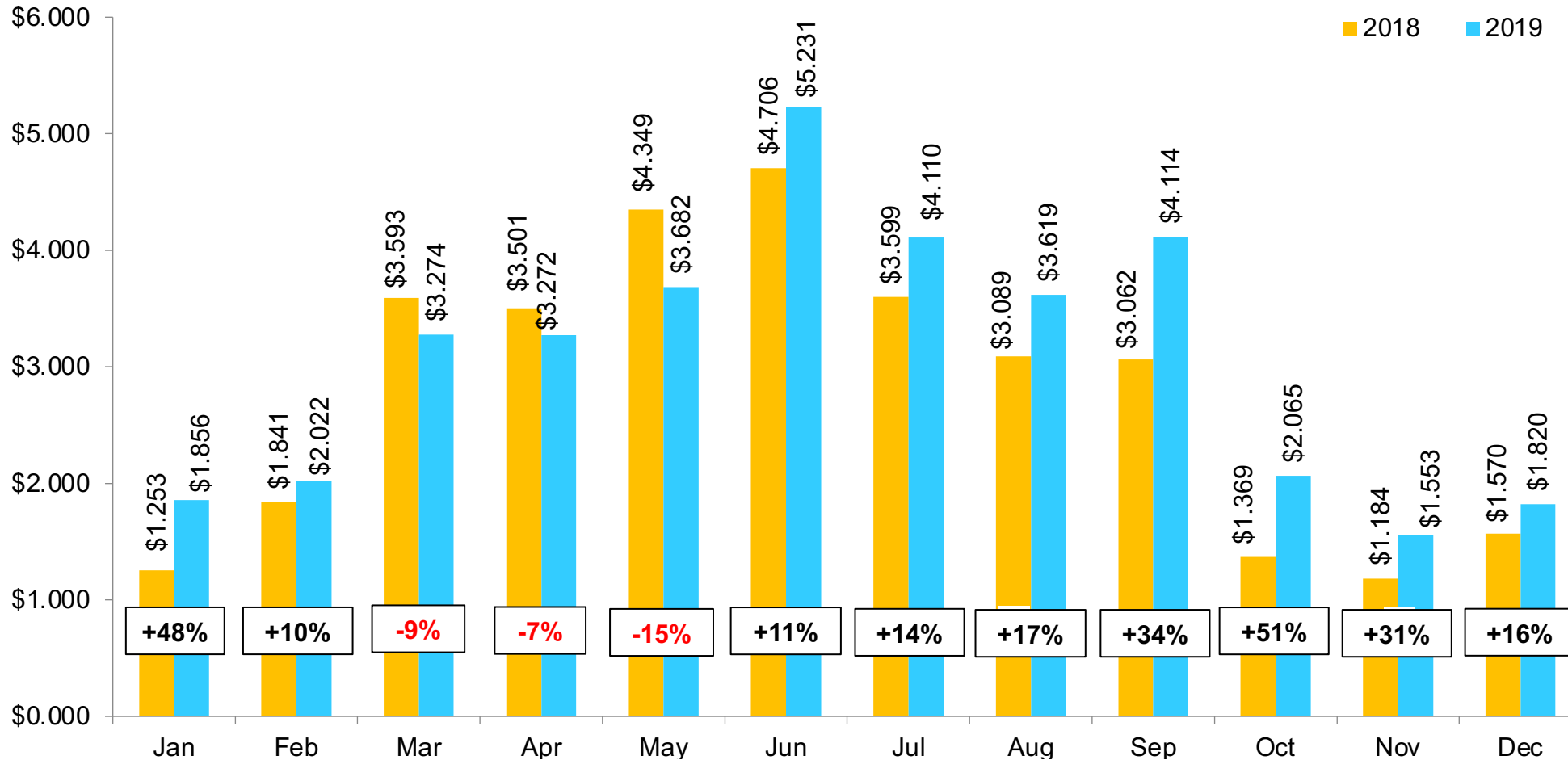
WEST SOUTH CENTRAL MONTHLY MANGO VOLUME (MILLIONS)



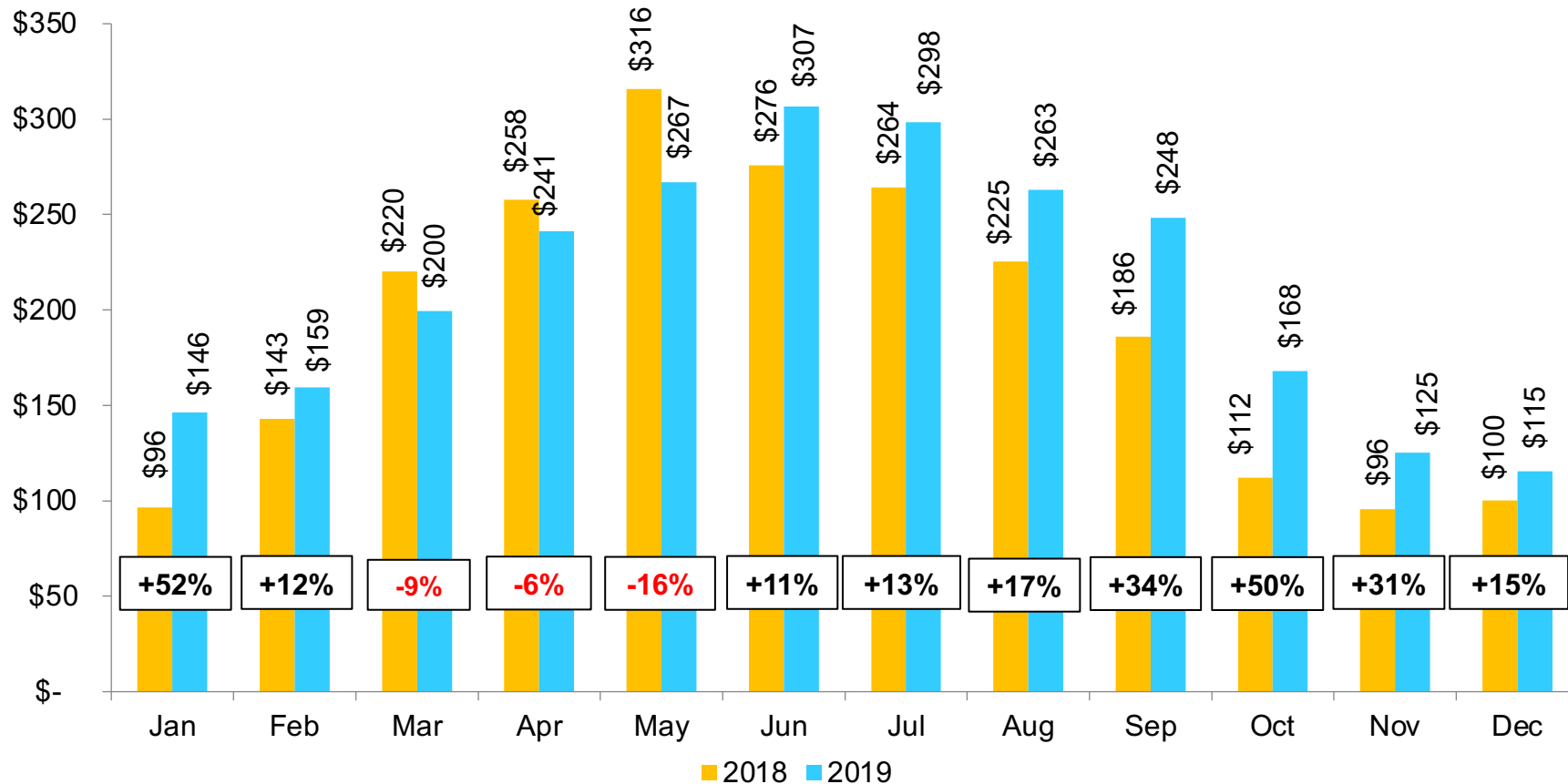
WEST SOUTH CENTRAL MONTHLY MANGO VOLUME/STORE/WEEK



WEST SOUTH CENTRAL MONTHLY MANGO SALES (MILLIONS)



WEST SOUTH CENTRAL MONTHLY DOLLARS/STORE/WEEK





Organic Performance



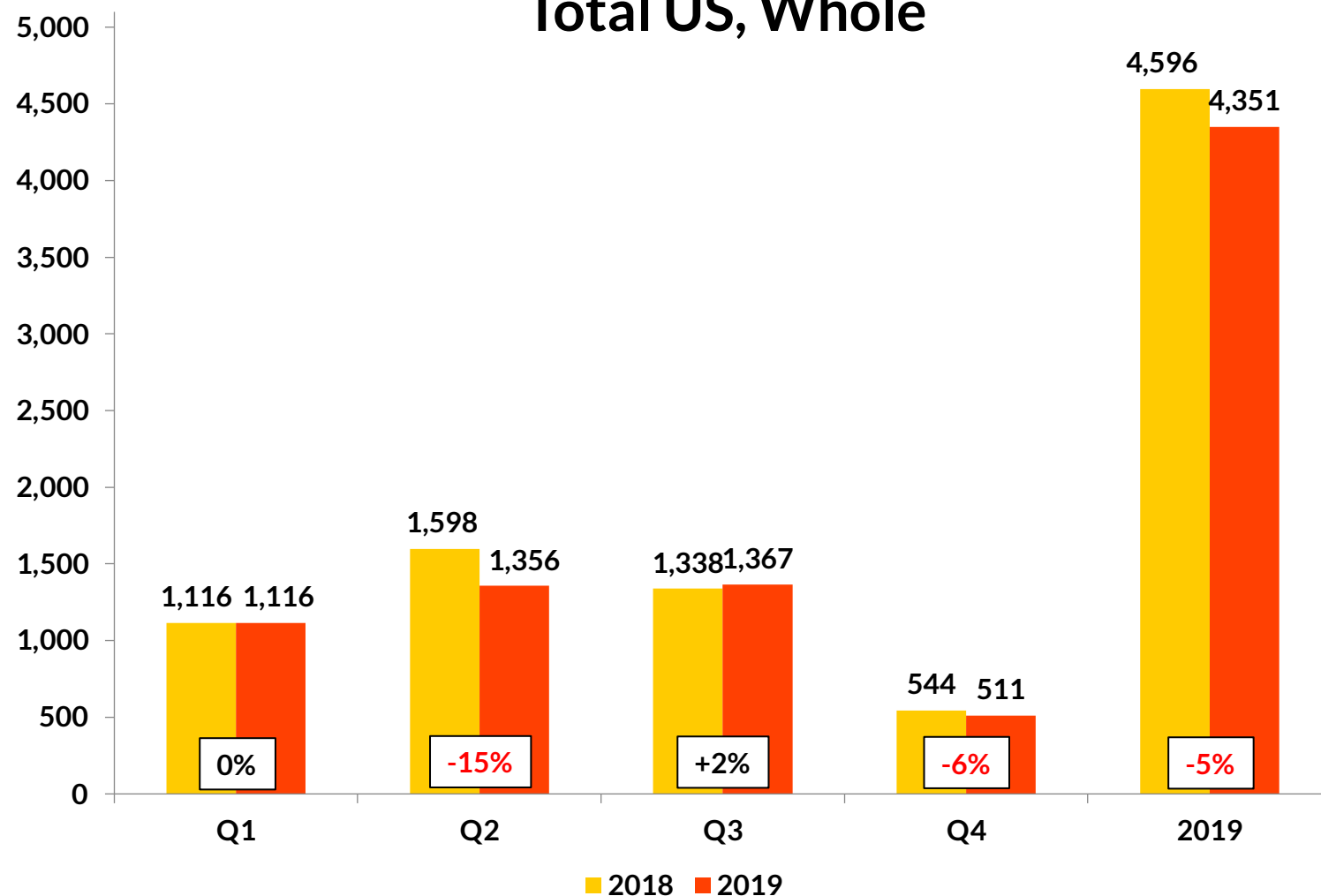
ORGANIC

WHOLE ORGANIC VOLUME

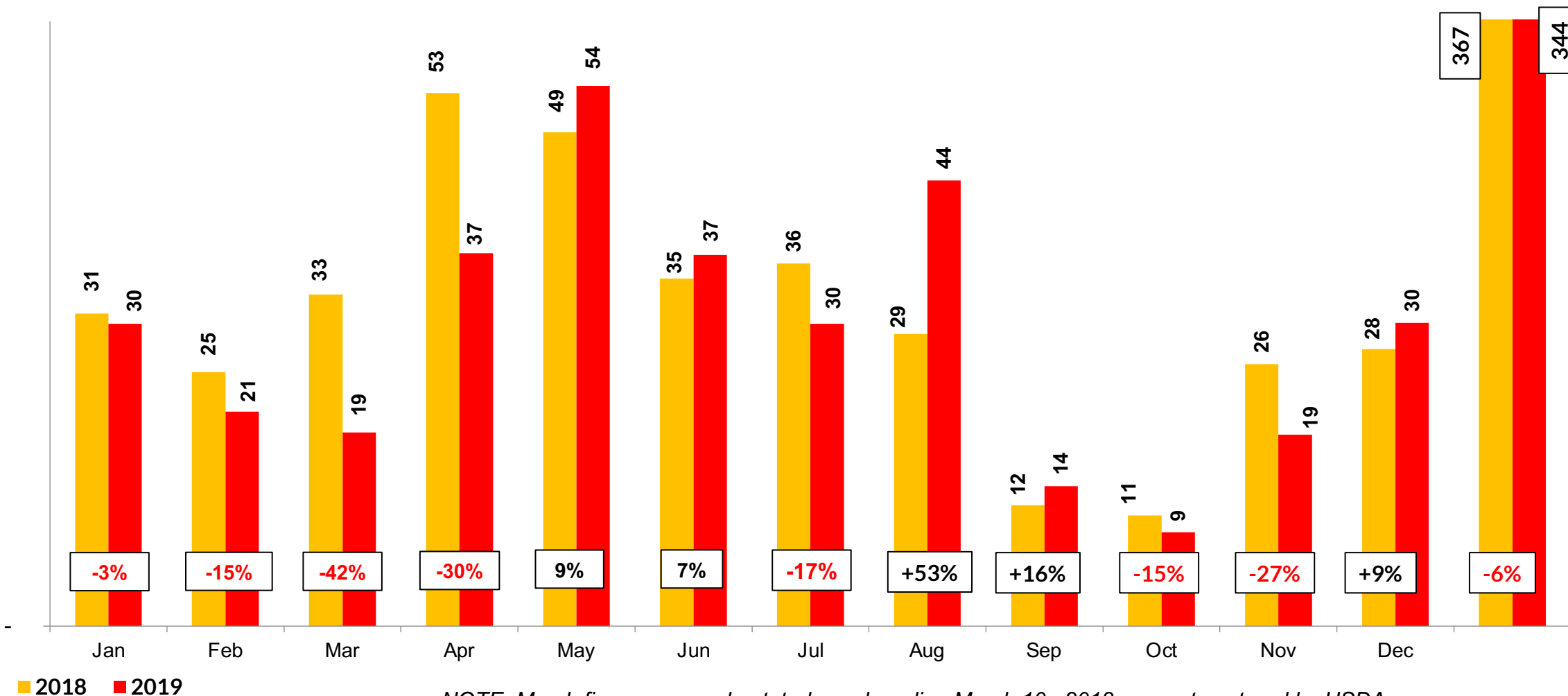
In 2019, organic volume was down, -5%.

Q3 was the only quarter with growth (+2%) in 2019.

Quarterly Organic Volume in Thousands Total US, Whole



2019 NUMBER OF STORES (000) ON AD



NOTE: March figures are understated, week ending March 10, 2018 was not captured by USDA.
Same week in 2019 was pulled for this report for equity in comparison.