

# FRESH PRODUCE Category & Subcategory Report

September 2024



# Project Overview

---

## Report Purpose

This report was created to provide businesses selling in the Fresh Produce category a better understanding of the markets for their products as well as potentially new target markets in the United States. Data presented in this report is intended to provide greater detail regarding consumer purchasing trends for products in this category.

## Included in this report:

This report provides market dynamics for each product subcategory within the Fresh Produce category, delivering detailed insights into sales performance across diverse channels and US Census territories. Within this expanding category, the report covers four primary subcategories: Packaged Fruit, Packaged Salads & Greens, Packaged Herbs, and Packaged Vegetables.

Despite most sales being attributed to the Multi-Outlet (MULO) channel, this report also includes a breakdown of sales in the Natural Channel to address the prominence of emerging Maine Food & Beverage producers active in Natural and Specialty markets. Additionally, the report highlights the performance of leading brands within the Northeast Census region, a typical entry point for Maine producers.

## Data

All data in this report is derived from the **SPINS Satori Database** and refers to the 52 weeks ending September 8, 2024, unless otherwise noted.

## Project Team and Project Funding

This report was completed by the Maine Center for Entrepreneurs in partnership with Camoin Associates. Work was completed as a part of the larger body of work under the Domestic Trade Pilot Program, commissioned by the Maine Office of Business Development and funded in part by the Maine Jobs & Recovery Plan.



# Table of Contents

---

- I. **Executive Summary**, pg. 4-5
- II. **SPINS Data Source & Glossary of Terms**, pg. 6-7
- III. **Overall Category Performance for Produce**, pg. 8 - 15
- IV. **Packaged Fruit Subcategory Performance**, pg. 16 - 25
- V. **Packaged Vegetables Subcategory Performance**, pg. 26 - 35
- VI. **Packaged Salads & Greens Subcategory Performance**, pg. 36 - 45
- VII. **Packaged Herbs Subcategory Performance**, pg. 46 - 55

# How to Use This Report

---

## Size of Market

These details and subcategory performance information are valuable for a sales or pitch deck. Generally, businesses and investors find it helpful to understand the overall size of the category and subcategories to **measure the health of a particular category and the scope of opportunities within it.**

Details about market sizing can be found in Section III.

## Growth of Market

Each section of this report shows how the category or subcategory is growing in the Multi-Outlet Channel and Natural Channel, and which geographic areas are growing faster than others. This information helps companies think strategically about **which retail channels offer the best opportunities** for growth in the category and subcategories and **which regions represent the best prospects.**

## Top 10 Brands in the Northeast Region

Most Maine companies start their retail development locally and then build out regionally and nationally. Companies can leverage this information to **identify the top-performing brands, how they are performing in sales dollars and units sold, and how your brand is performing against them.**

## Average All Commodity Volume (ACV)

This represents a weighted measure of product availability or distribution based on total store sales. High values indicate the brand is performing well, while low values indicate an opportunity for brand distribution growth or a more optimized market share. **This can help a company understand which brands are performing well or lack distribution.**

## Average Retail Price in the Top 10 Brands

helps companies understand retail pricing trends. Note that most retail brands showed pricing growth due to inflation. This information **can be used in sales reports as a comparative analysis against performance in the subcategory.** This data reflects the point of sale and scanned price for the brand's products, including discounts at the register. It does not provide pricing for individual SKUs, which should be reviewed when making pricing and pack size decisions.

## Other Uses

This data can direct a company's business development efforts. Suppose a certain channel and location have experienced strong growth. In that case, identifying best-fit retailers in those locations and connecting with relevant distributors and brokers can be worthwhile. **Again, indicating the growth of a channel or geography can be a useful reference point to include in a sales or pitch deck.**

# Executive Summary

**The Fresh Produce category is valued at \$46.3 billion in retail sales in the United States.**

The overall product category grew 3.4%, annually in 2024, and grew in all US Census regions. The South led in sales volume at \$17.8 billion and demonstrated a solid growth rate of 3.9%.

Fresh Packaged Produce subcategories and Fresh Fruit & Fresh Herbs have shown increases in dollar sales volume compared to the prior year, while Vegetables have performed with a more modest increase, and Salads & Greens are showing a minor decline in dollar volume compared to the prior year.

Notably, of the 4 subcategories reviewed, Packaged Fruit, the largest subcategory and responsible for \$209.3B in sales, grew at 7.0%, experiencing its highest sales growth within the Natural Channel. Packaged Herbs, the smallest of the 4 categories, also experienced significant sales increases, accounting for \$607.3M and a very high growth of 6.9% over the prior year.

In the same realm of comparison, Packaged Vegetables, the second largest subcategory, with \$15.28B in sales, experienced modest growth of 1.4%. The only subcategory showing a decline was the third largest subcategory, Salads & Greens, responsible for \$9.49B and slightly declined at -0.8% compared to the prior year.

It is important to consider that the inflationary trends of 2024 continue to be a contributing factor to the reported sales growth, potentially affecting the true scale of market expansion.



## SPINS Satori Data

52 Weeks Ending September 8, 2024

- **Fresh Produce**
- **Sub-Categories:** *(Packaged Fruit, Vegetables, Salads & Greens, and Herbs)*

### Channels:

**MULO** “Multi Unit Location Outlet” - includes Food/Grocery, Drug, Mass Merchandisers, Walmart, Club Stores (BJs and Sam’s), Dollar Stores (Dollar General, Family Dollar, Fred’s Dollar), and Military DECA (commissaries).

**Natural** - includes full-format stores with \$2 million+ in annual sales and 40% or more of UPC-coded sales from natural/organic/specialty products. Includes co-ops, associations, independents and large regional chains (excludes Whole Foods & Trader Joes).



### SPINS Syndicated Retail Data

The data included in this report is from **SPINS Satori Database** and includes Retail Scan Data for the Natural sales channel and Multi Unit Location Outlets (MULO). SPINS is focused mainly on the health and wellness ecosystem and addresses the growing niche landscapes of natural, specialty, alternative, and gourmet product retailers. SPINS partners with IRI to provide MULO data.

### US Census Regions





# SPINS<sup>®</sup>

## Additional Terms & Definitions

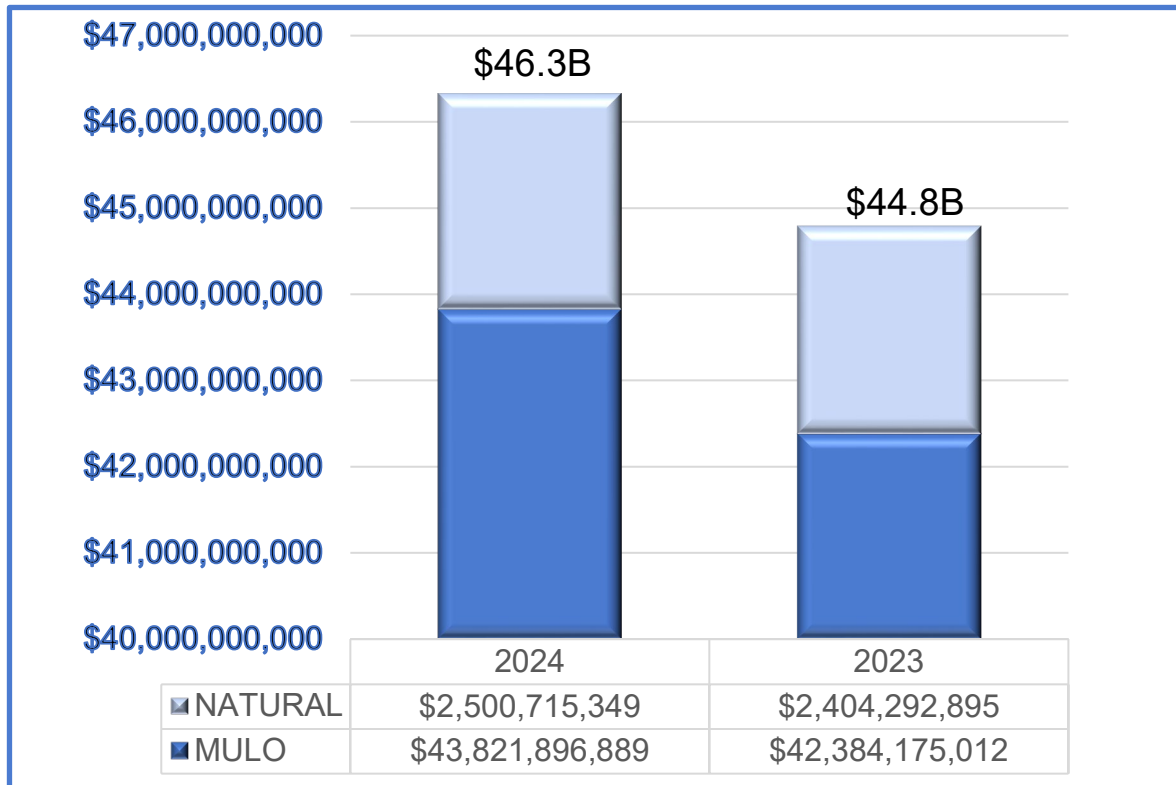
Term	Definition
Dollars	Total dollar sales of a product or group of products in the time frame indicated.
Dollars, Yago	Dollars sold over the same time period a year ago.
Dollars +/- Chg, Yago	The positive or negative dollar change for products sold in year reported, versus previous year.
Dollars % Chg, Yago	The positive or negative percent change of dollars sold in year reported, versus the previous year.
Units	Total unit sales of a product or group of products.
Units, Yago	Units sold over the same time period a year ago.
Units +/- Chg, Yago	The positive or negative units change for units sold in year reported, versus previous year.
Units % Chg, Yago	The positive or negative percent change of units sold in year reported, versus previous year.
AVG ACV	This Average All Commodity Volume measure is an average of a product's distribution weighted by the store size (ACV) across all weeks in a time period in which the product was distributed.
Average Items Selling	This is the number of items, on average, that a retailer carries of a category, segment or brand. e.g. if a brand is made of 7 different items (skus), the average store that carries the brand at all may have 4.
ARP	The Average Retail Price reports the average product unit price.
ARP, Yago	Average Retail Price over the same time period a year ago.
ARP +/- Chg, Yago	The positive or negative dollar change for average retail pricing in year reported, versus previous year.

# Fresh Produce - Category Performance

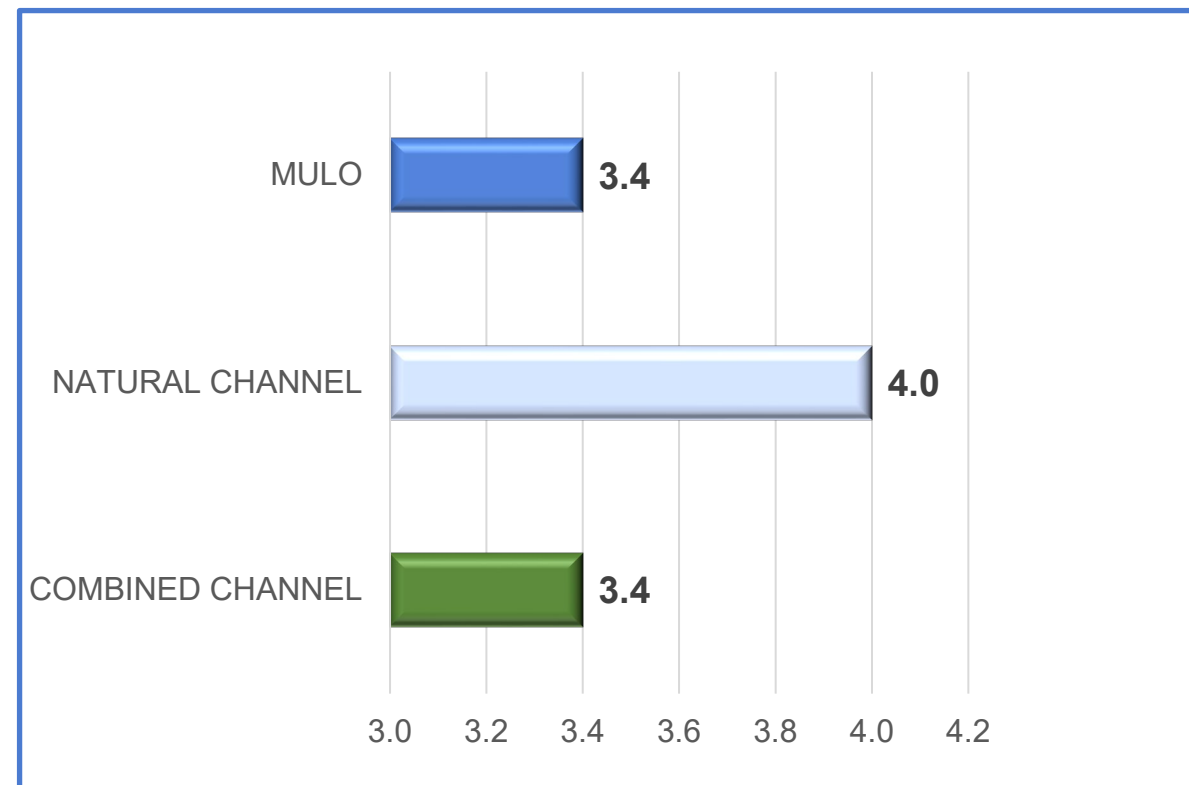
*SPINS Satori - 52 Weeks Ending September 8, 2024*

# Total US Fresh Produce

Total US Dollars



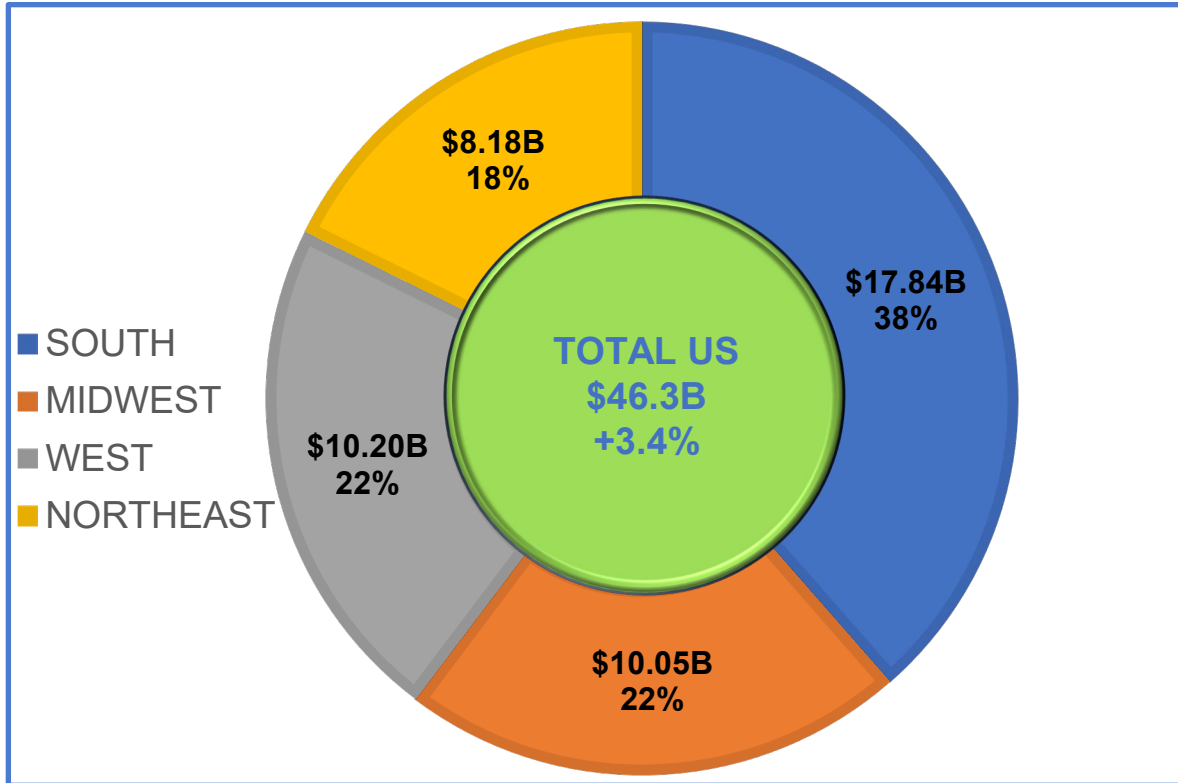
% Dollar Change vs Year Ago



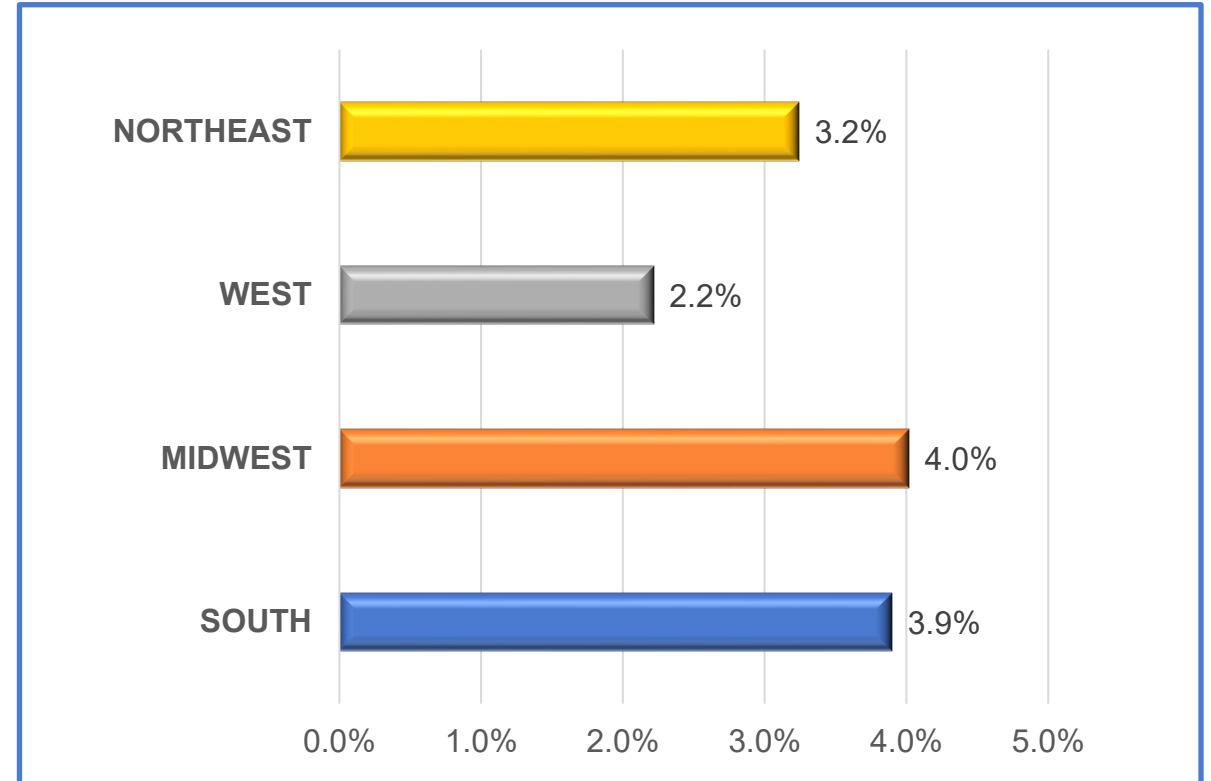
- The Total US Fresh Produce combined channel is a \$46.3B category and is performing better than the prior year by 3.4%.
- Sales dollars were up in both the Natural Channel (+4.0%) and MULO (+3.4%).
- As in most categories, MULO represents most category sales.

# Total US Fresh Produce - By Region

Total Dollars and % Category Share by Region



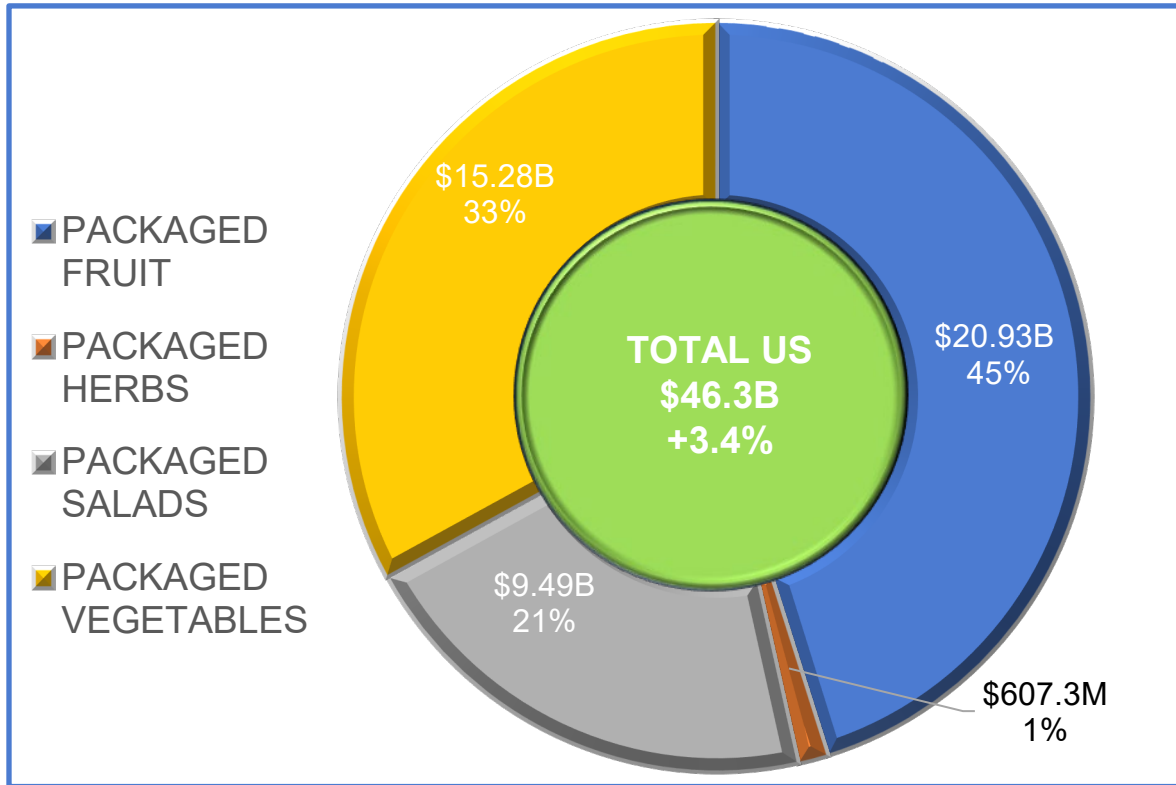
% Dollars Change vs Year Ago



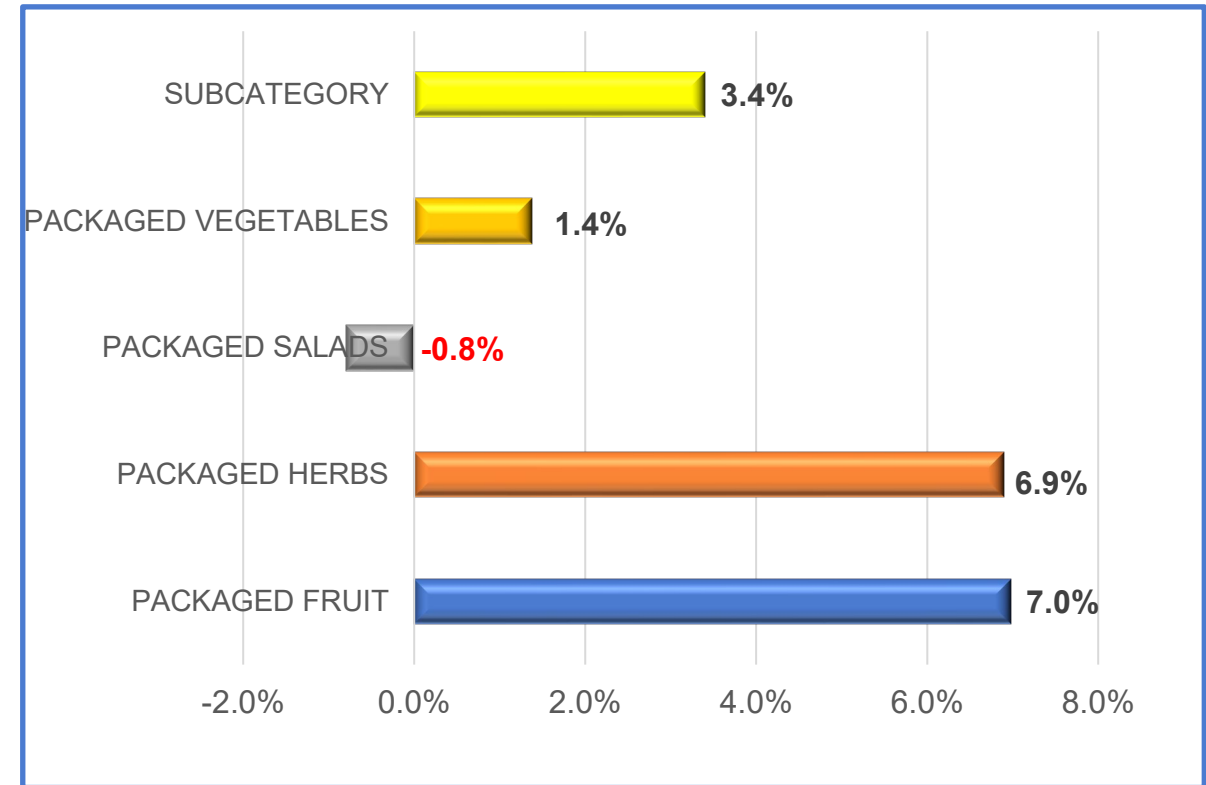
- The South represents 38% (\$17.8B) of total category sales dollars, followed by the West (22%), Midwest (22%) Northeast (18%).
- All 4 regions experienced growth over the prior year.

# Total US Fresh Produce - By Subcategory

Total Subcategory \$ and % Category Share



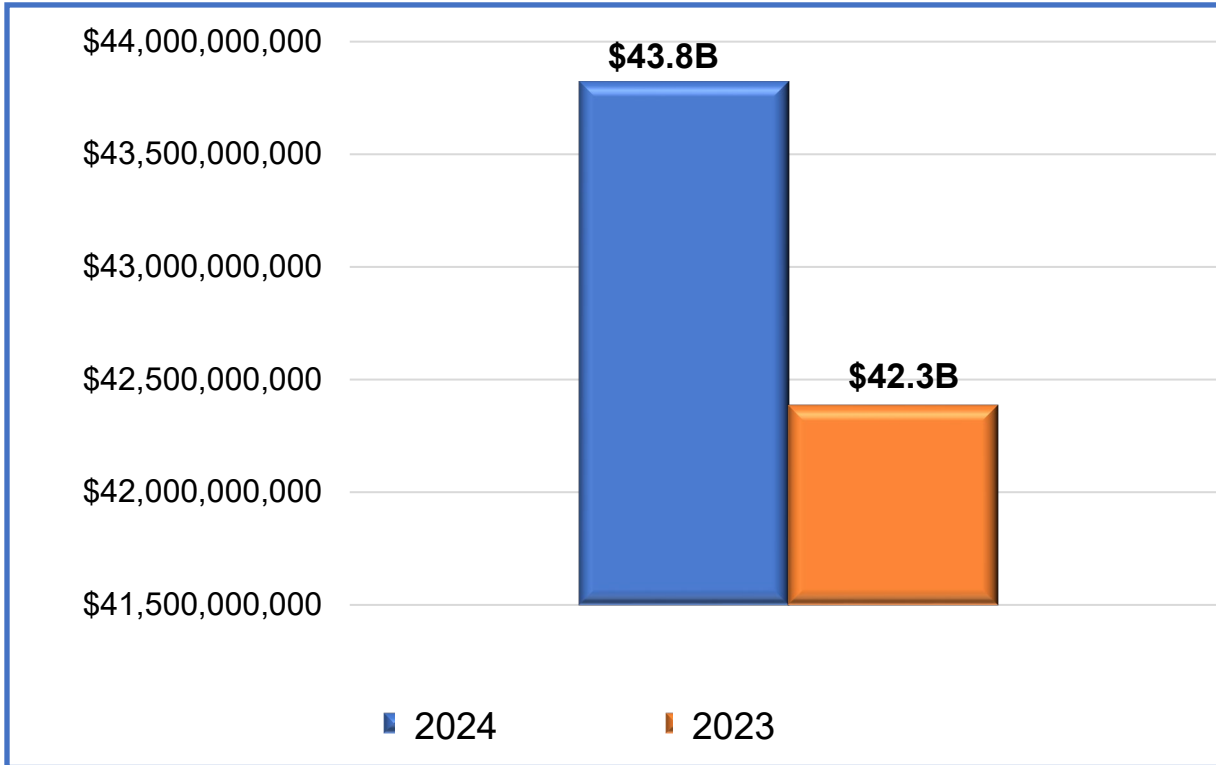
% Dollar Change vs Year Ago



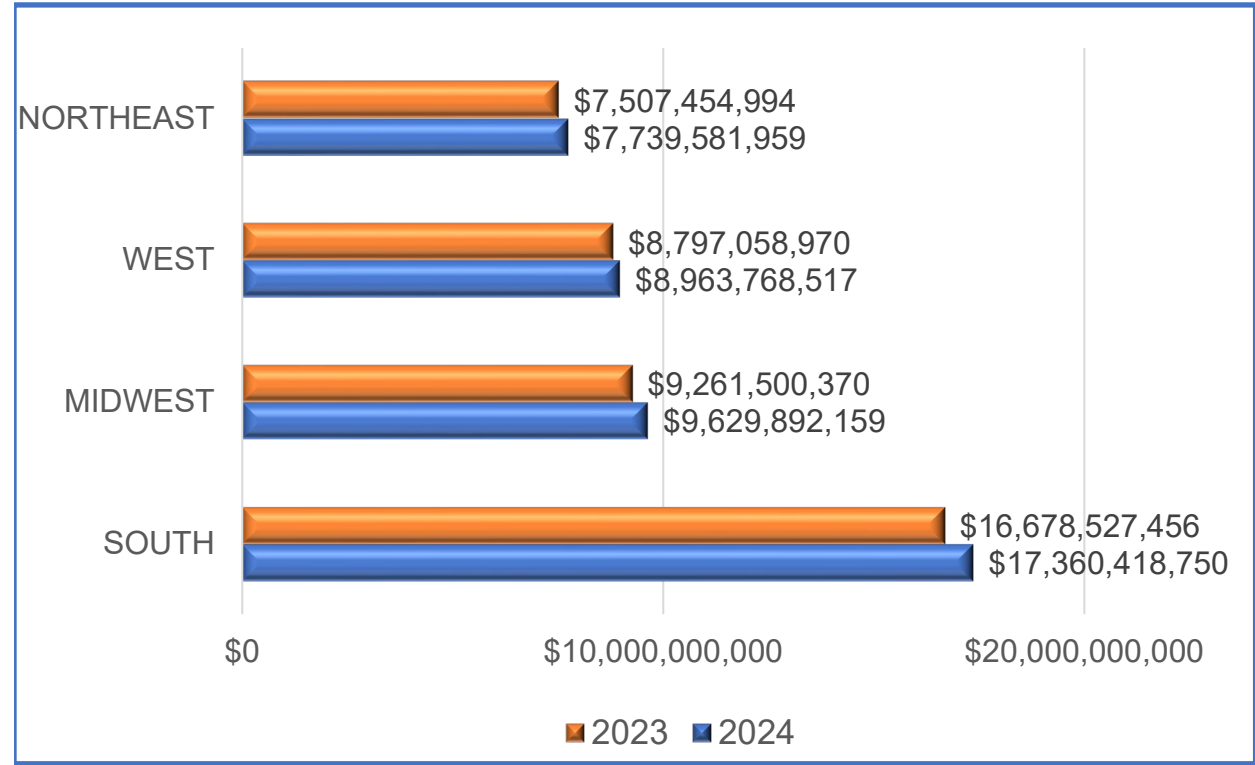
- Fresh Produce is made up of 4 Subcategories: *Packaged Fruit, Packaged Herbs, Packaged Salads/Greens and Packaged Vegetables.*
- Packaged Fruit is the largest of the four subcategories, with 45% of category sales (\$20.9B), but is showing the largest subcategory dollar growth at 7.0%.
- Packaged Vegetables is the 2<sup>nd</sup> largest of the 4 subcategories, representing \$15.2B and 33% of total category sales. Packaged Vegetables dollars experienced modest growth, 1.4% over prior year.

# MULO: Fresh Produce

MULO Dollars



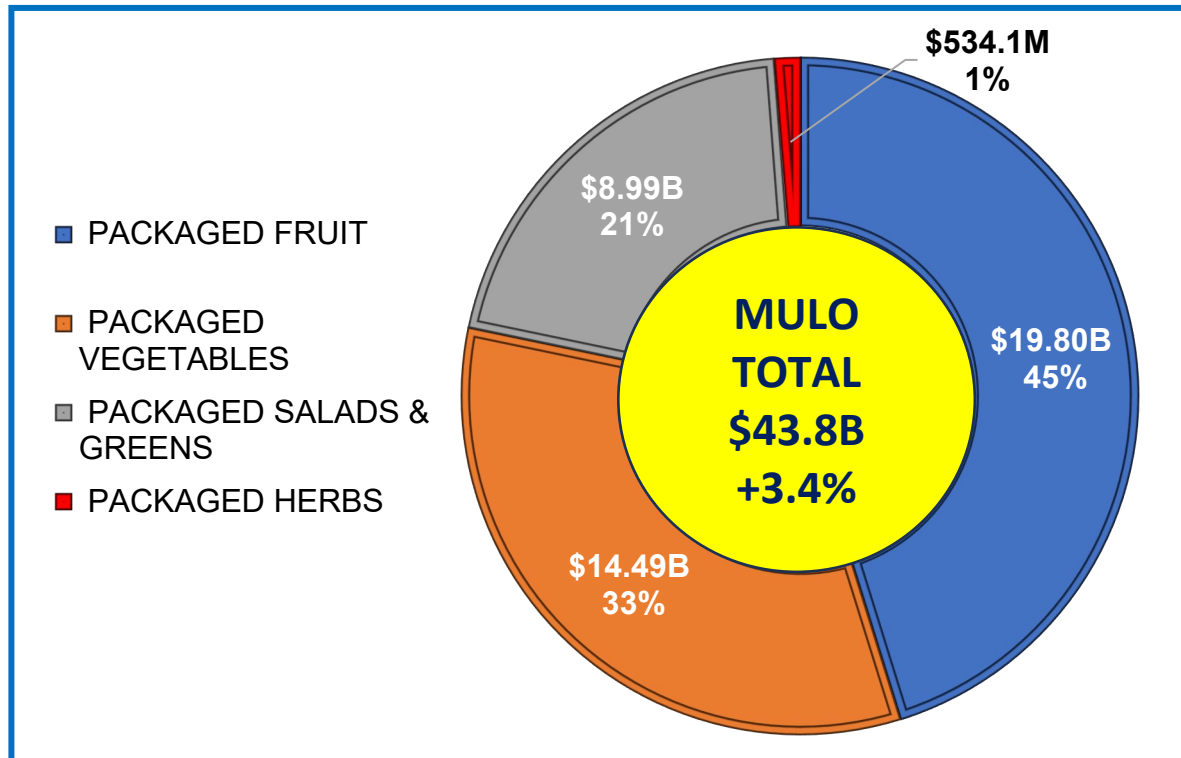
Dollar Change vs Year Ago by Region



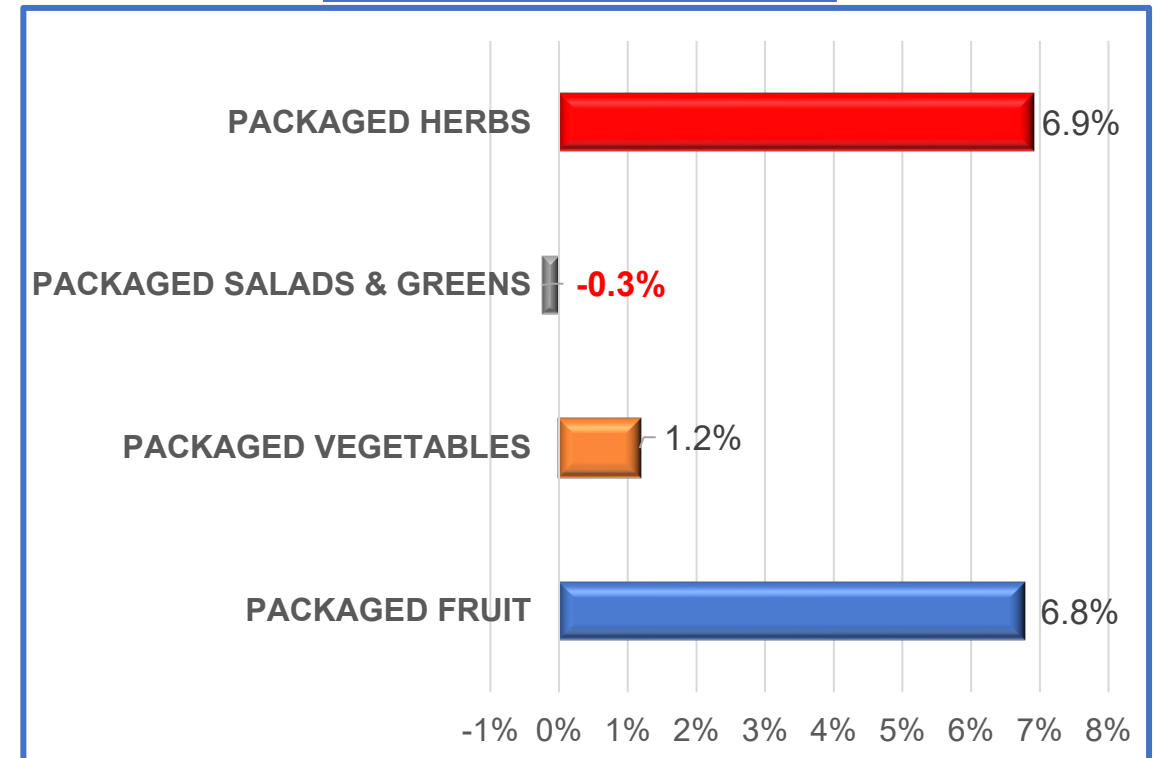
- Total US MULO dollar volume for the category is \$43.8B and is performing better than prior year by 3.4%.
- The South region is the largest \$ volume region, representing 40% of total MULO sales, followed by Midwest, West and Northeast, respectively.
- All 4 regions and Total US are posting sales greater than prior year.

# MULO: Fresh Produce - By Subcategory

MULO Subcategory \$ and % Category Share



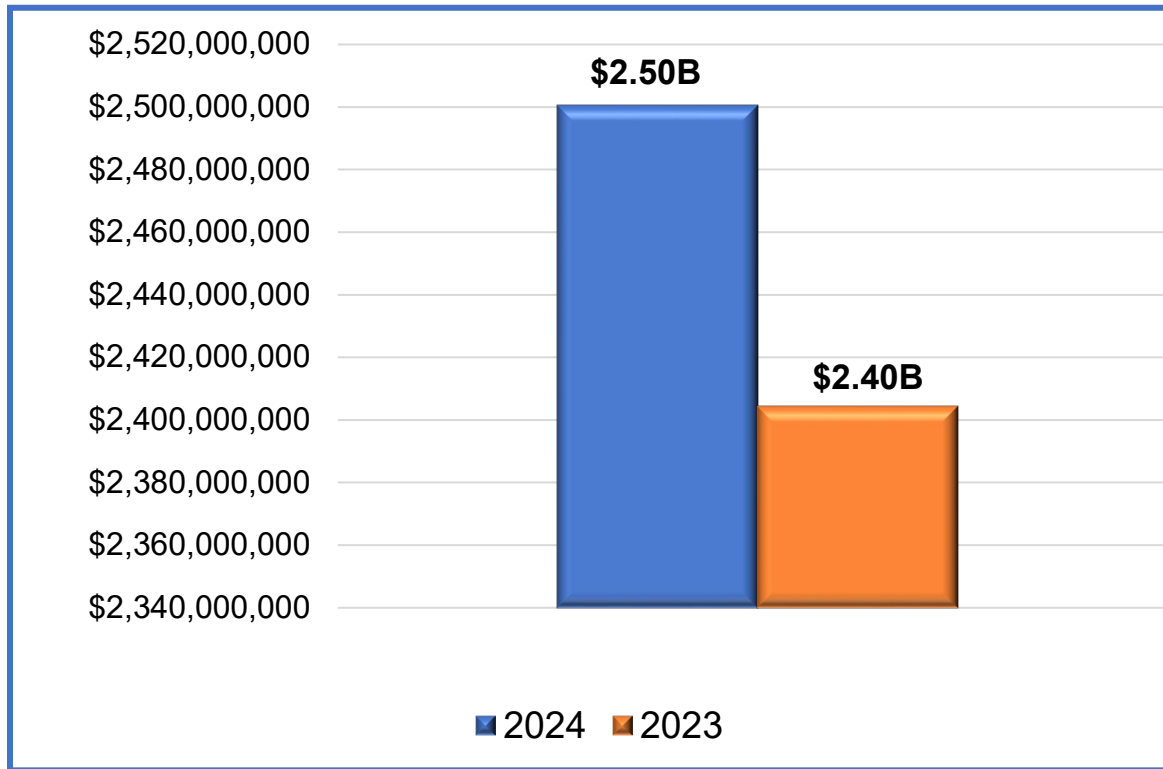
% Dollar Change vs Year Ago



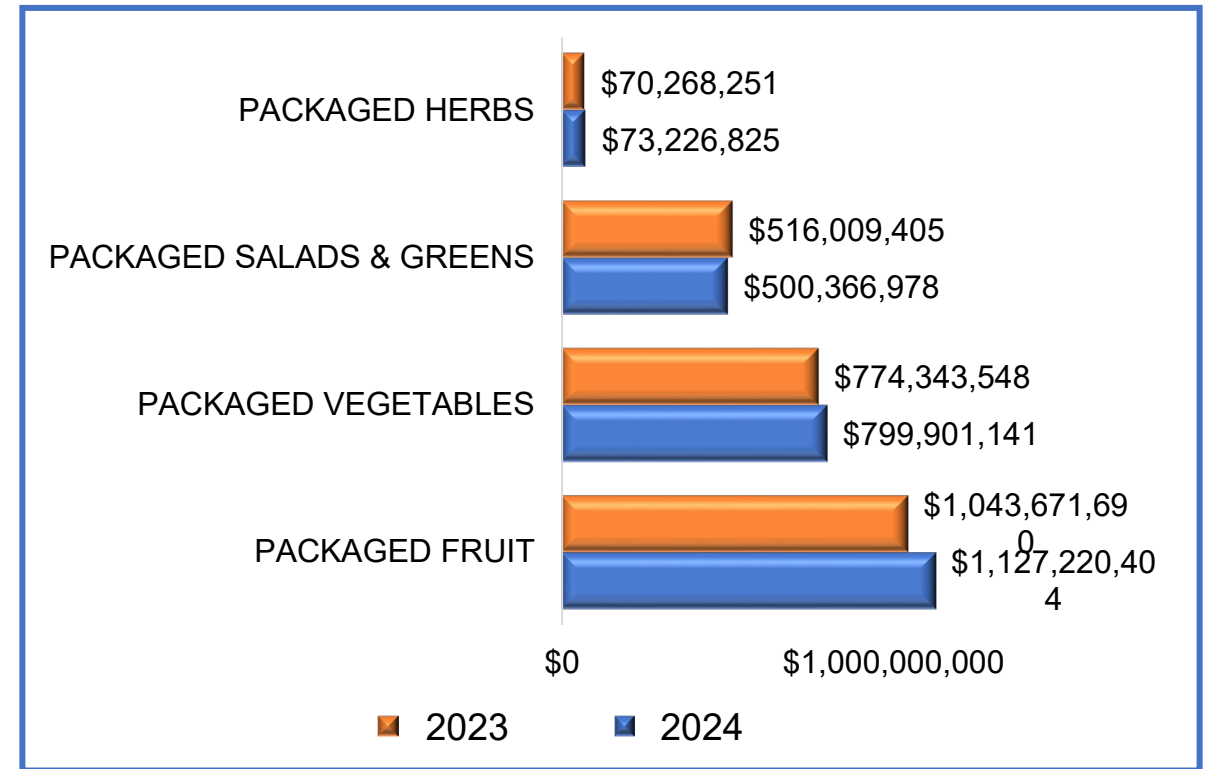
- Packaged Fruit is the largest subcategory, representing \$19.8B, or 45% of total MULO \$ volume, with growth of 6.8%.
- Packaged Herbs, Salads & Greens, and Vegetables represent the remainder of the category volume.
- Of the remaining subcategories, only Packaged Salads & Greens and Packaged Vegetables are in decline to the prior year. Packaged Herbs, the smallest subcategory, has achieved the highest growth at 6.9%.

# Natural Channel: Fresh Produce - Category

Natural Channel Dollars



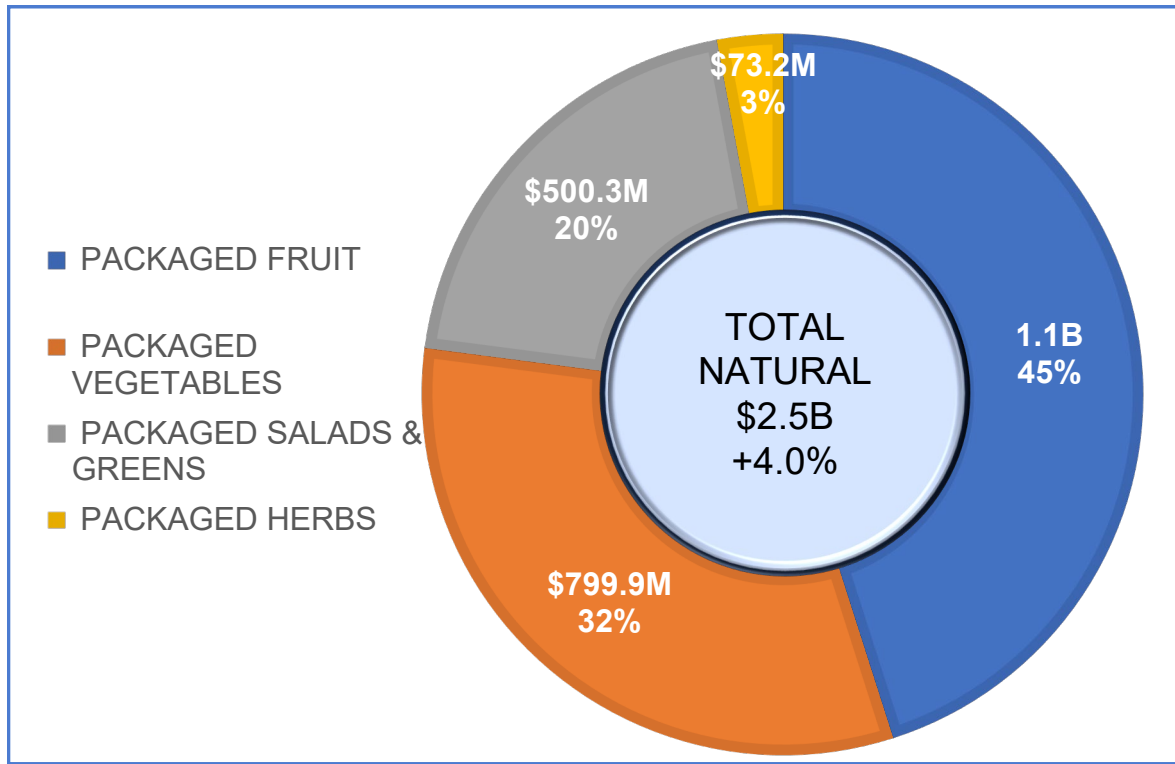
Dollar Change vs Year Ago by Region



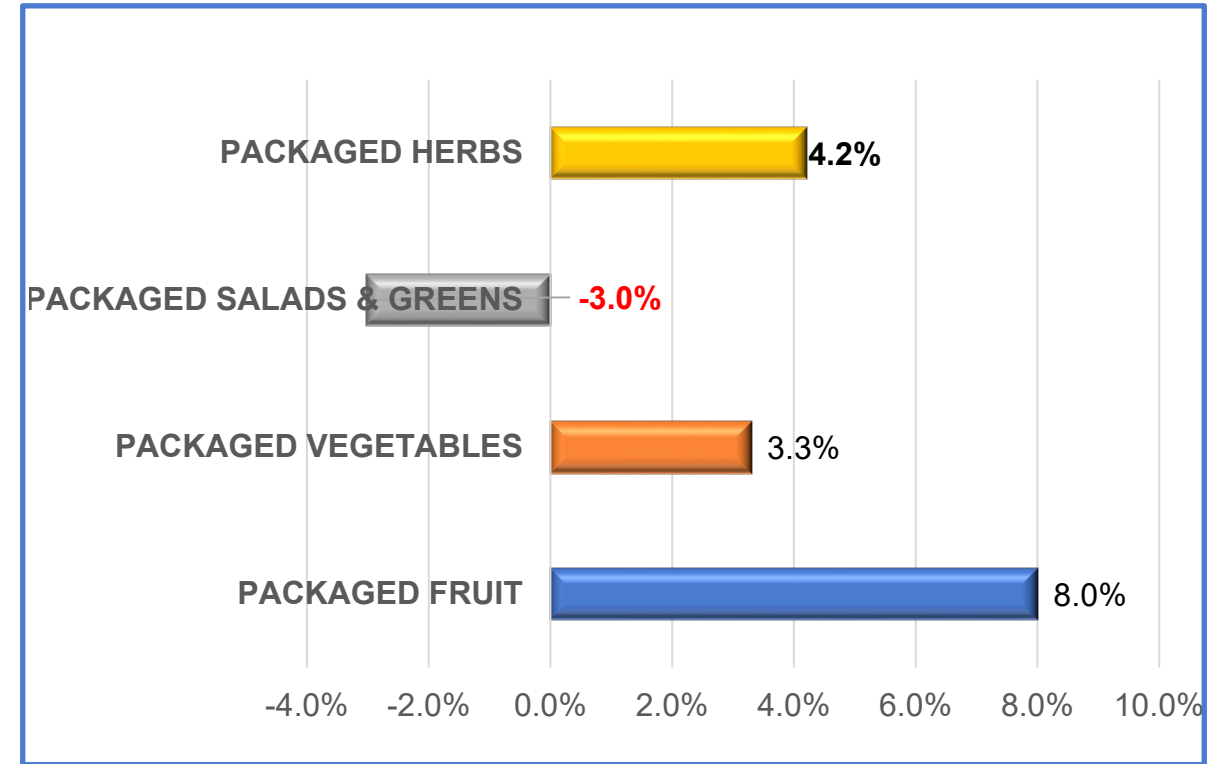
- Natural Channel \$ volume for the category is \$2.5B and has grown 4.0% over the prior year.
- The West region is the largest \$ volume region, representing 51% of total Natural Channel category sales, followed by South, Northeast, and Midwest regions, respectively.
- All four regions are posting sales greater than the prior year.

# Natural Channel: Fresh Produce - By Subcategory

Natural Channel Subcategory \$ and % Category Share



% Dollar Change vs Year Ago



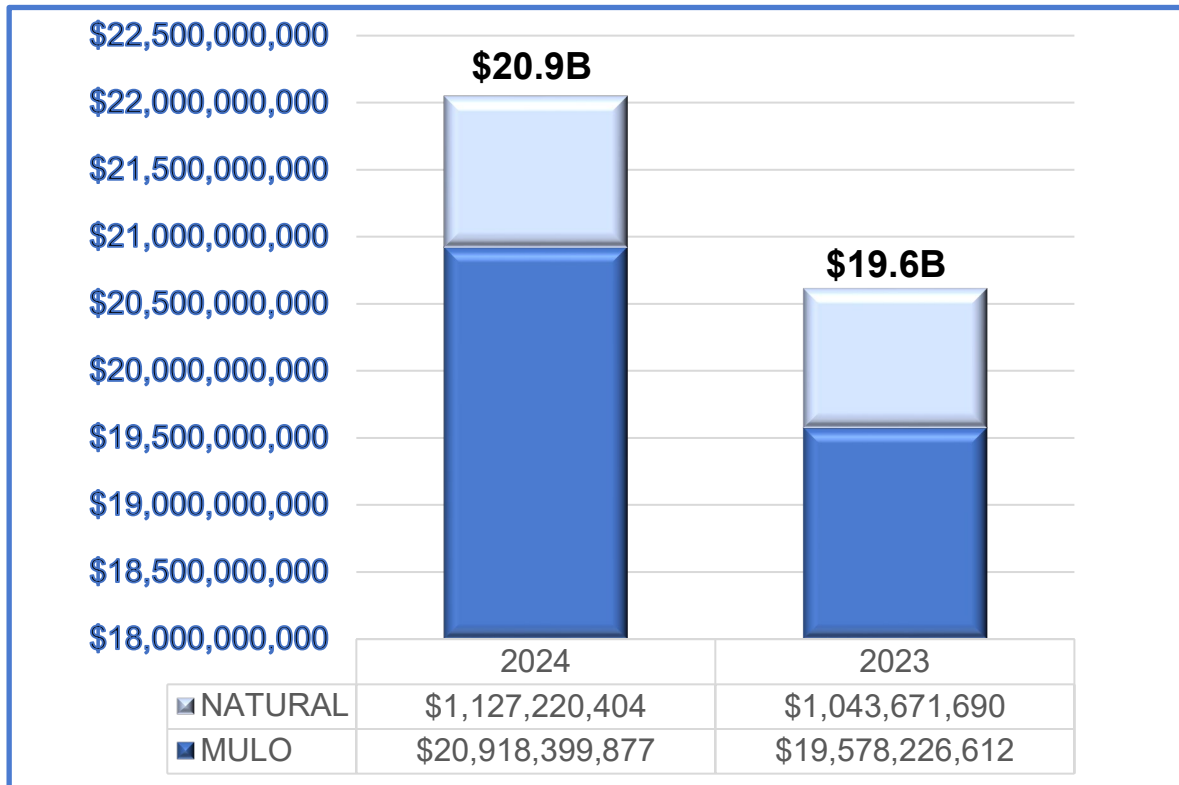
- Packaged Fruits are the largest segment in the Natural Channel, representing 45% of sales, and they are the fastest-growing segment in dollars, at 8% compared to the prior year.
- Packaged Vegetables is the 2<sup>nd</sup> largest segment in the Natural Channel, at 32% of \$ volume.
- Packaged Salads & Greens is the 3<sup>rd</sup> largest segment, at 20% of \$ volume.
- Packaged Herbs, the smallest segment, represent 3% of the volume but are growing by 4.2% in the Natural Channel.

# Subcategory Performance Packaged Fruit

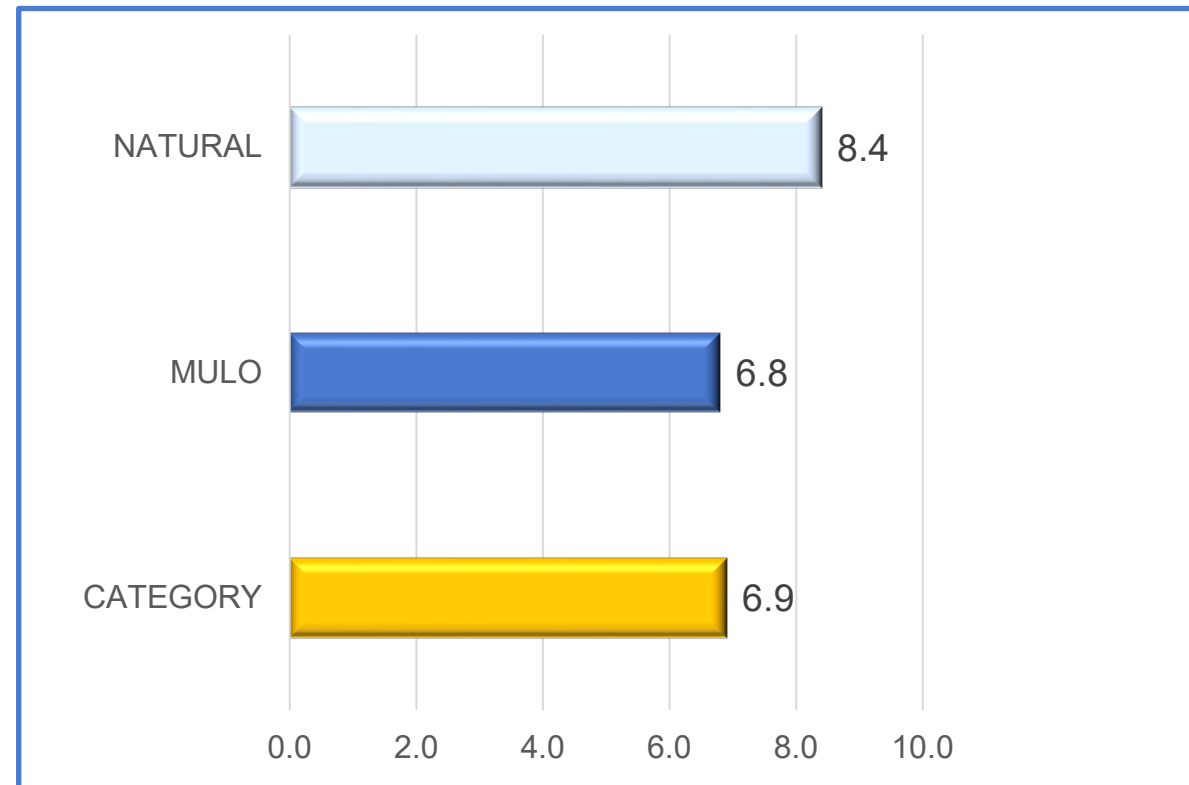
*SPINS Satori - 52 Weeks Ending 9-8-24*

# Total US Packaged Fruit

Total US Dollars



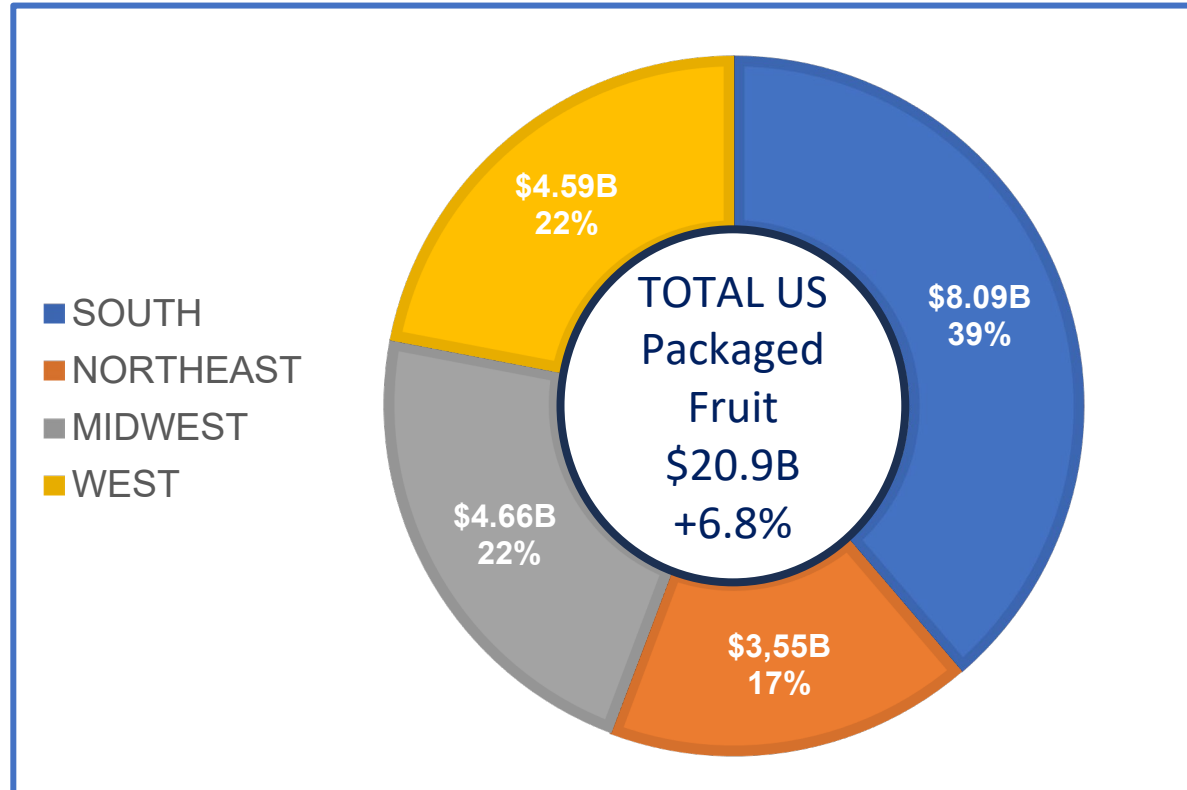
% Dollar Change vs Year Ago



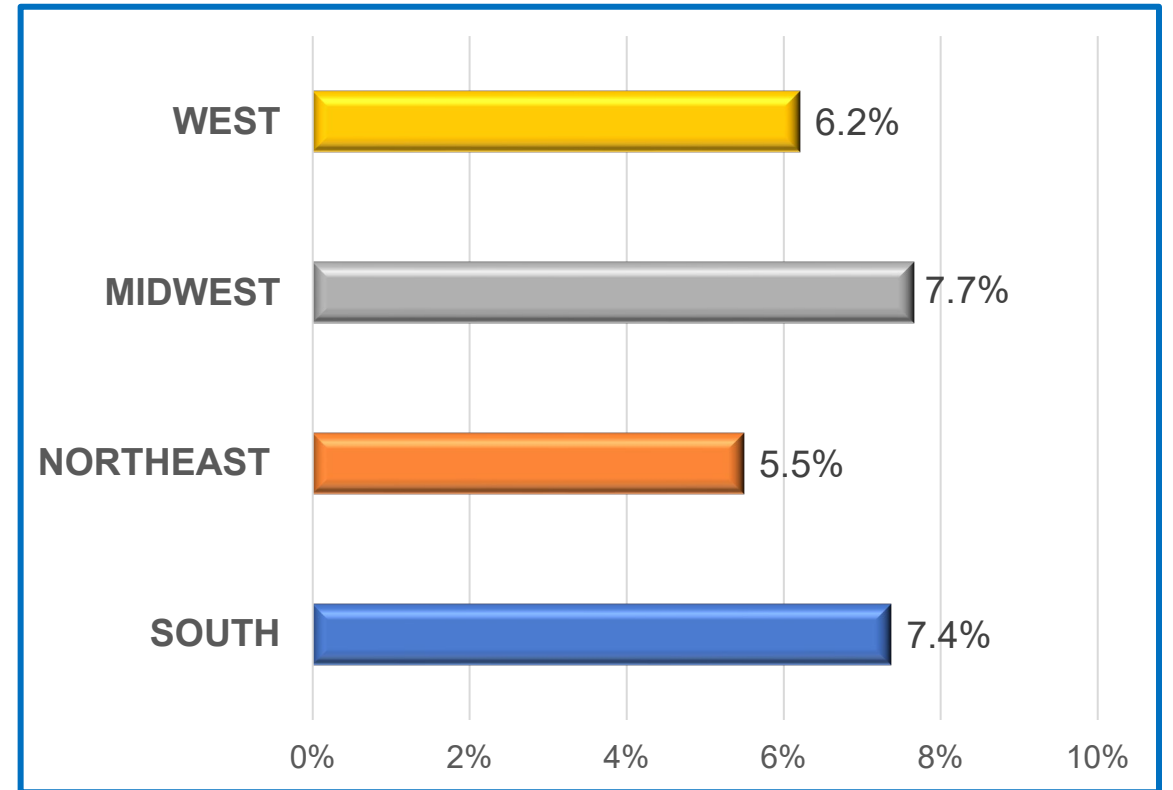
- Total US Packaged Fruit is a \$20.9B subcategory (the largest of the subcategories) and is performing better than the prior year by 6.8%.
- Sales dollars were up in both the Natural Channel (+8.4%) and MULO (+6.8%).
- MULO represents most of the subcategory sales but experienced lower growth than the Natural Channel over the prior year.

# Total US Packaged Fruit - By Region

Total Dollars and % Category Share by Region



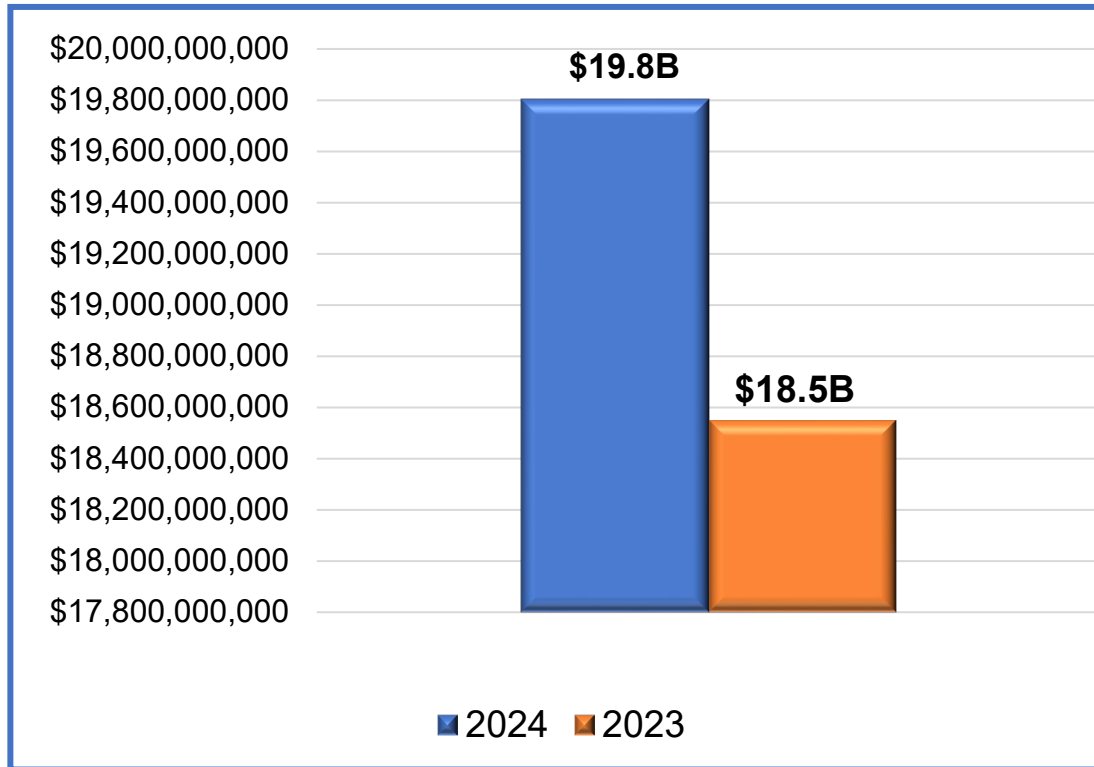
% Dollar Change vs Year Ago



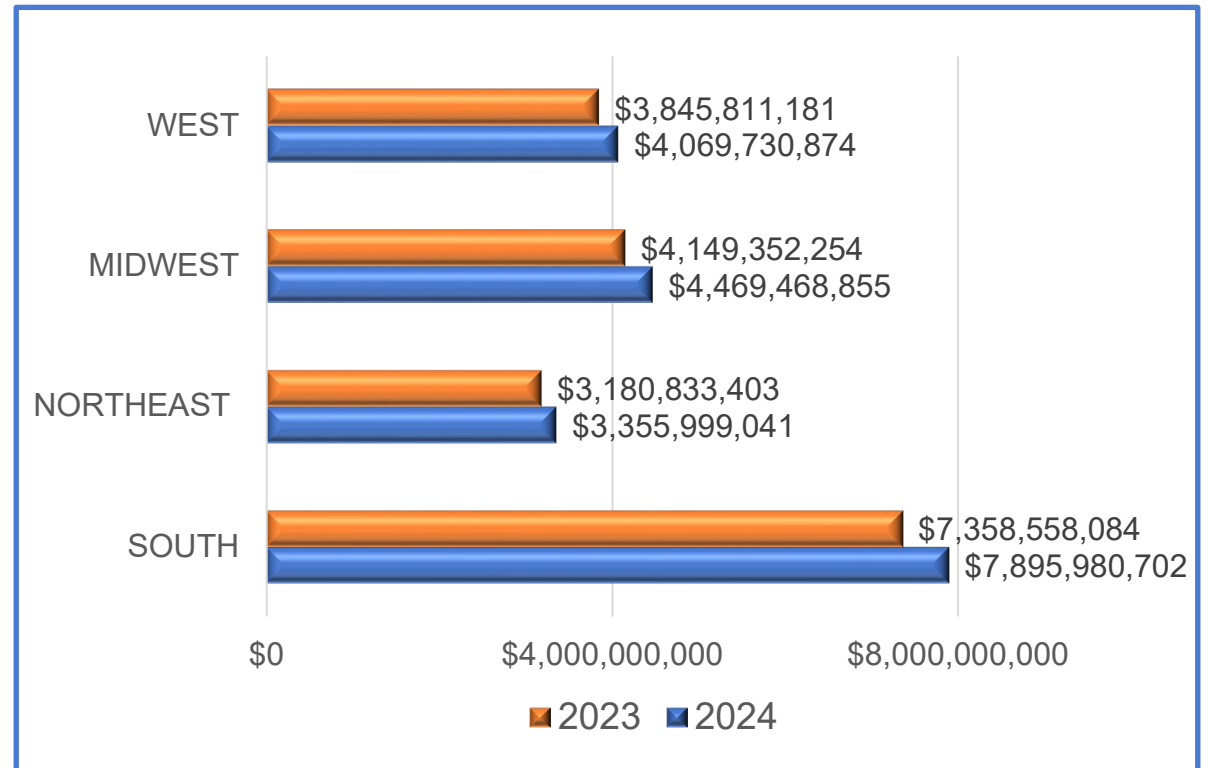
- The South region is the most highly developed region for this subcategory, responsible for 39% of \$ volume.
- The 3 remaining regions, West, Northeast, and Midwest, are responsible for the remaining \$ volume, with respective growth at 6.2%, 5.5%, and 7.7%, respectively.

# Total US MULO: Packaged Fruit Subcategory

MULO Total US Dollars



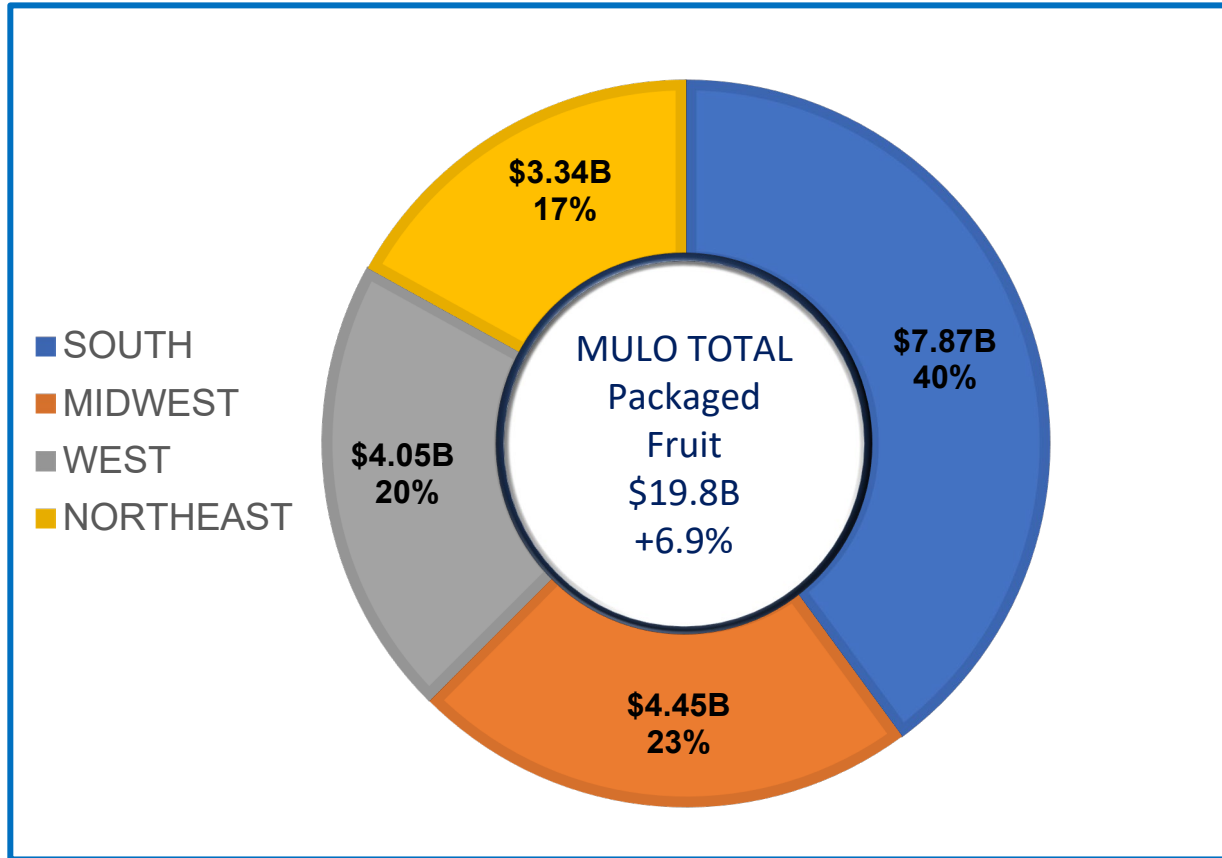
Dollar Change vs Year Ago



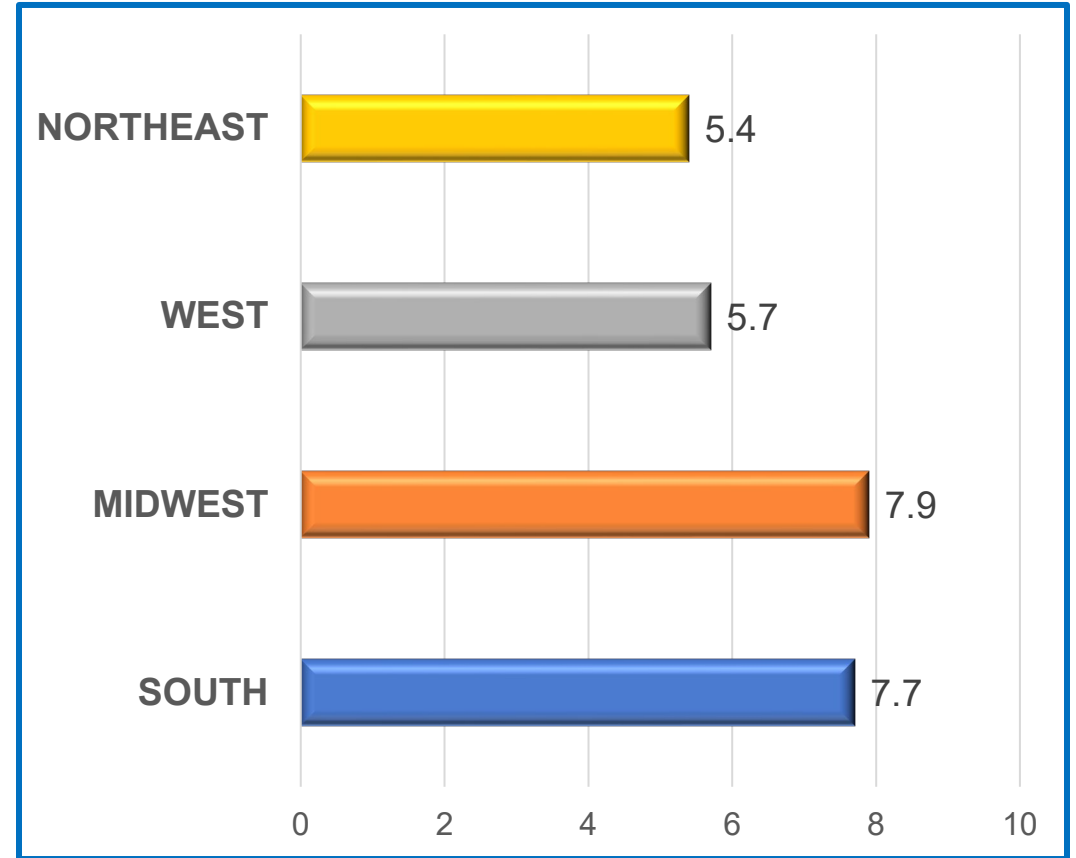
- Total US MULO \$ volume for Packaged Fruit is \$19.8B and grew 6.8% over the prior year.
- The South region is the largest \$ volume region, followed by West, Midwest, and Northeast, respectively.
- All four census regions and Total US post sales greater than the prior year.

# Toal US MULO: Packaged Fruits Subcategory - By Region

MULO Dollars and % Category Share by Region



% Dollar Change vs Year Ago



- The South region is the most highly developed region for this subcategory, responsible for 40% of \$ volume, with \$ growth of 7.7%.
- The 3 remaining regions, Northeast, West, and Midwest, are responsible for the remaining 60% of \$ volume, with respective growth of 5.4%, 5.7%, and 7.9%.

# MULO: Packaged Fruit

## Top 10 Brands Northeast Census Region

Description	Dollars	Dollars, Yago	Dollars		Units		Units			Average		ARP, Yago	
			Dollars +/- Chg, Yago	% Chg, Yago	Units	Units, Yago	Units +/- Chg, Yago	% Chg, Yago	Avg % ACV	TDP	Items Selling		ARP
<b>PRODUCE PACKAGED FRUIT</b>	<b>\$3,355,999,041</b>	<b>\$3,180,833,403</b>	<b>\$175,165,638</b>	<b>5.5</b>	<b>783,230,201</b>	<b>745,522,326</b>	<b>37,707,875</b>	<b>5.1</b>		<b>\$9,863.10</b>		<b>\$4.28</b>	<b>\$4.27</b>
DRISCOLLS	\$700,515,186	\$668,231,123	\$32,284,063	4.8	157,024,990	147,519,022	9,505,968	6.4	77.1	\$976.40	11.5	\$4.46	\$4.53
PRIVATE LABEL	\$609,068,803	\$561,658,096	\$47,410,707	8.4	125,842,718	111,281,587	14,561,131	13.1	77.9	\$1,333.90	16.3	\$4.84	\$5.05
NOBRAND	\$362,219,682	\$348,613,940	\$13,605,741	3.9	86,544,110	82,462,729	4,081,381	4.9	84.7	\$1,250.30	14.5	\$4.19	\$4.23
NATURIPE	\$108,987,993	\$104,776,992	\$4,211,001	4	29,979,642	28,605,840	1,373,802	4.8	54.9	\$278.10	3.8	\$3.64	\$3.66
ANDREW & WILLIAMSON	\$85,323,185	\$76,966,737	\$8,356,448	10.9	28,360,298	23,773,931	4,586,367	19.3	27.1	\$124.80	2.4	\$3.01	\$3.24
PRIVATE LABEL ORGANIC	\$74,363,025	\$81,502,135	-\$7,139,110	-8.8	17,373,055	16,797,210	575,845	3.4	55.4	\$309.50	5.1	\$4.28	\$4.85
PARAMOUNT CITRUS	\$73,475,113	\$63,570,614	\$9,904,500	15.6	13,132,694	11,772,852	1,359,842	11.6	25.5	\$56.70	1.3	\$5.59	\$5.40
MULTIPLE BRANDS	\$69,340,460	\$53,194,862	\$16,145,597	30.4	17,400,729	14,539,148	2,861,581	19.7	52.2	\$299.80	4.2	\$3.98	\$3.66
WISHNATZKI FARMS	\$60,052,089	\$59,079,215	\$972,874	1.6	15,590,064	15,350,245	239,819	1.6	24.2	\$137.60	3.2	\$3.85	\$3.85
DEL MONTE	\$53,548,563	\$63,673,762	-\$10,125,200	-15.9	23,326,522	24,983,976	-1,657,454	-6.6	77.1	\$708.80	8.7	\$2.30	\$2.55

- MULO Northeast Packaged Fruit is showing 5.5% growth over the prior year in \$ volume, with unit sales at 5.1%.
- Driscoll's is the #1 brand in dollar volume, with \$700.5M in sales, growing 4.8% in dollars and 6.4% in units year over year.
- Private Label brands (retailer brands produced by others) are highly developed in \$ sales and are growing 8.4% in \$ sales and 13.1% in unit sales.
- Paramount Citrus is an emerging brand with high sales growth in both dollars and units, 15.6% and 11.6%, respectively.

# MULO: Packaged Fruit

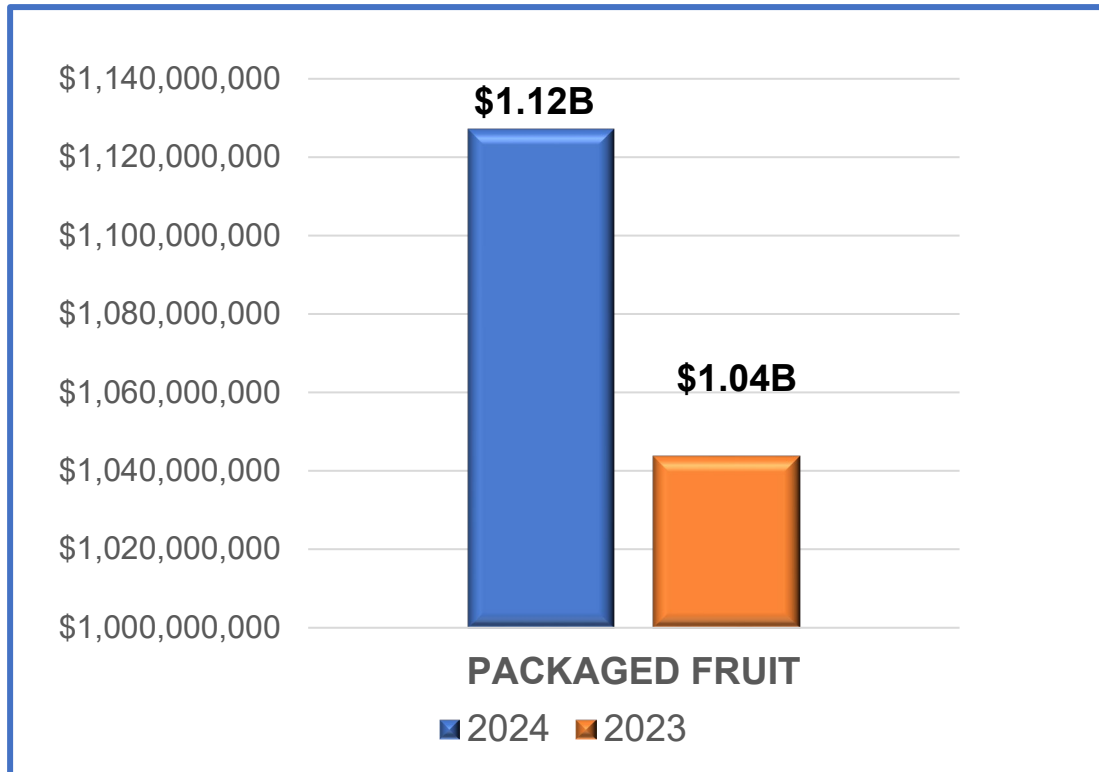
## Top Markets Northeast Census Region

Geography	Dollars %				Units %				TDP, Yago	ARP, Yago		
	Dollars	Dollars, Yago	Dollars +/- Chg, Yago	Chg, Yago	Units	Units, Yago	Units +/- Chg, Yago	Chg, Yago				
NEW YORK, NY - MULO	\$939,912,171	\$878,317,656	\$61,594,515	7	204,623,765	193,852,700	10,771,065	5.6	\$9,098	\$9,068	\$4.59	\$4.53
BALTIMORE, MD/WASHINGTON D.C. - MULO	\$653,422,563	\$612,879,294	\$40,543,269	6.6	149,906,969	143,506,190	6,400,779	4.5	\$10,795	\$11,106	\$4.36	\$4.27
PHILADELPHIA, PA - MULO	\$414,978,242	\$389,809,728	\$25,168,514	6.5	96,991,194	90,941,071	6,050,123	6.7	\$9,990	\$10,431	\$4.28	\$4.29
BOSTON, MA - MULO	\$330,928,782	\$318,575,566	\$12,353,216	3.9	71,893,541	69,569,207	2,324,334	3.3	\$8,337	\$8,261	\$4.60	\$4.58
HARRISBURG/SCRANTON, PA - MULO	\$281,055,480	\$268,963,278	\$12,092,202	4.5	66,461,182	62,782,646	3,678,536	5.9	\$11,037	\$11,830	\$4.23	\$4.28
HARTFORD, CT/SPRINGFIELD, MA - MULO	\$240,347,161	\$232,630,146	\$7,717,015	3.3	56,788,123	55,532,447	1,255,676	2.3	\$10,519	\$10,551	\$4.23	\$4.19
NEW ENGLAND - MULO	\$238,837,774	\$226,816,506	\$12,021,267	5.3	57,809,814	56,200,134	1,609,679	2.9	\$8,986	\$8,660	\$4.13	\$4.04
BUFFALO/ROCHESTER, NY - MULO	\$205,426,034	\$194,725,865	\$10,700,169	5.5	47,429,049	44,478,955	2,950,095	6.6	\$11,180	\$10,420	\$4.33	\$4.38
PITTSBURGH, PA - MULO	\$170,347,378	\$162,867,379	\$7,479,999	4.6	46,486,025	44,271,537	2,214,488	5	\$12,900	\$12,769	\$3.66	\$3.68
ALBANY, NY - MULO	\$89,579,634	\$84,122,329	\$5,457,304	6.5	22,970,249	21,815,057	1,155,193	5.3	\$10,602	\$9,908	\$3.90	\$3.86
SYRACUSE, NY - MULO	\$88,787,376	\$84,060,714	\$4,726,663	5.6	22,261,382	20,992,118	1,269,264	6	\$11,420	\$10,469	\$3.99	\$4.00
PROVIDENCE, RI - MULO	\$62,447,183	\$59,069,360	\$3,377,823	5.7	14,705,230	13,785,283	919,948	6.7	\$9,927	\$10,378	\$4.25	\$4.28

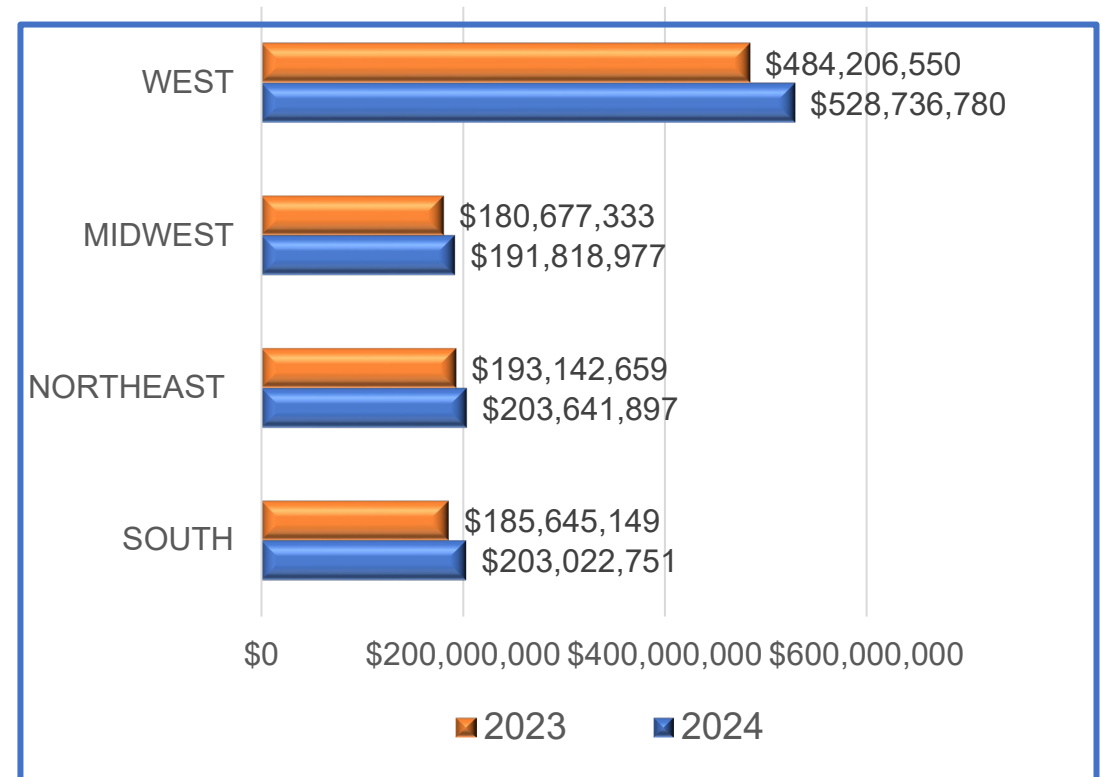
- New York is the largest market for Packaged Fruit in the Northeast, posting positive \$ sales growth of 7.0% and unit growth of 5.6%.
- Balt/Wash, the 2<sup>nd</sup> largest market, is showing the highest \$ growth, year over year, in dollar volume.
- The New England region is responsible for \$239M in sales and shows growth in both dollar and unit sales.

# Natural Channel: Packaged Fruit

Natural Channel Total US Dollars



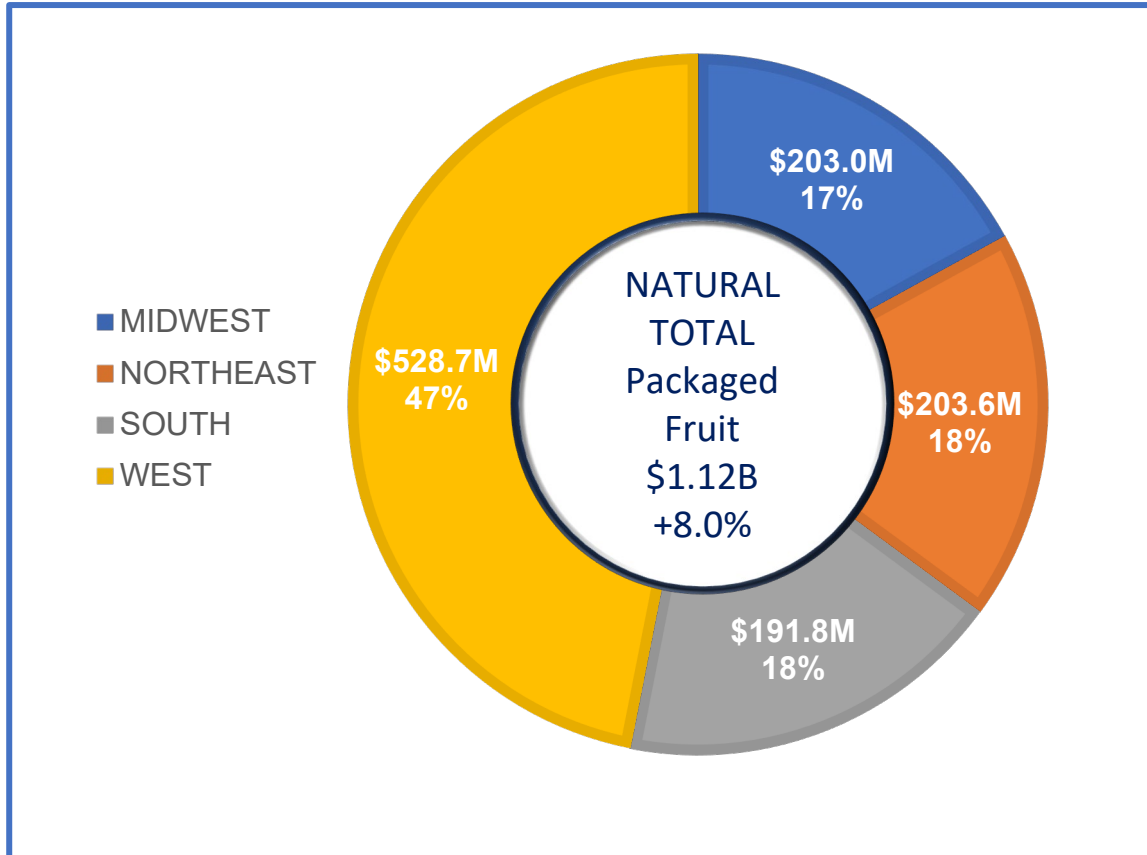
Dollar Change vs Year Ago



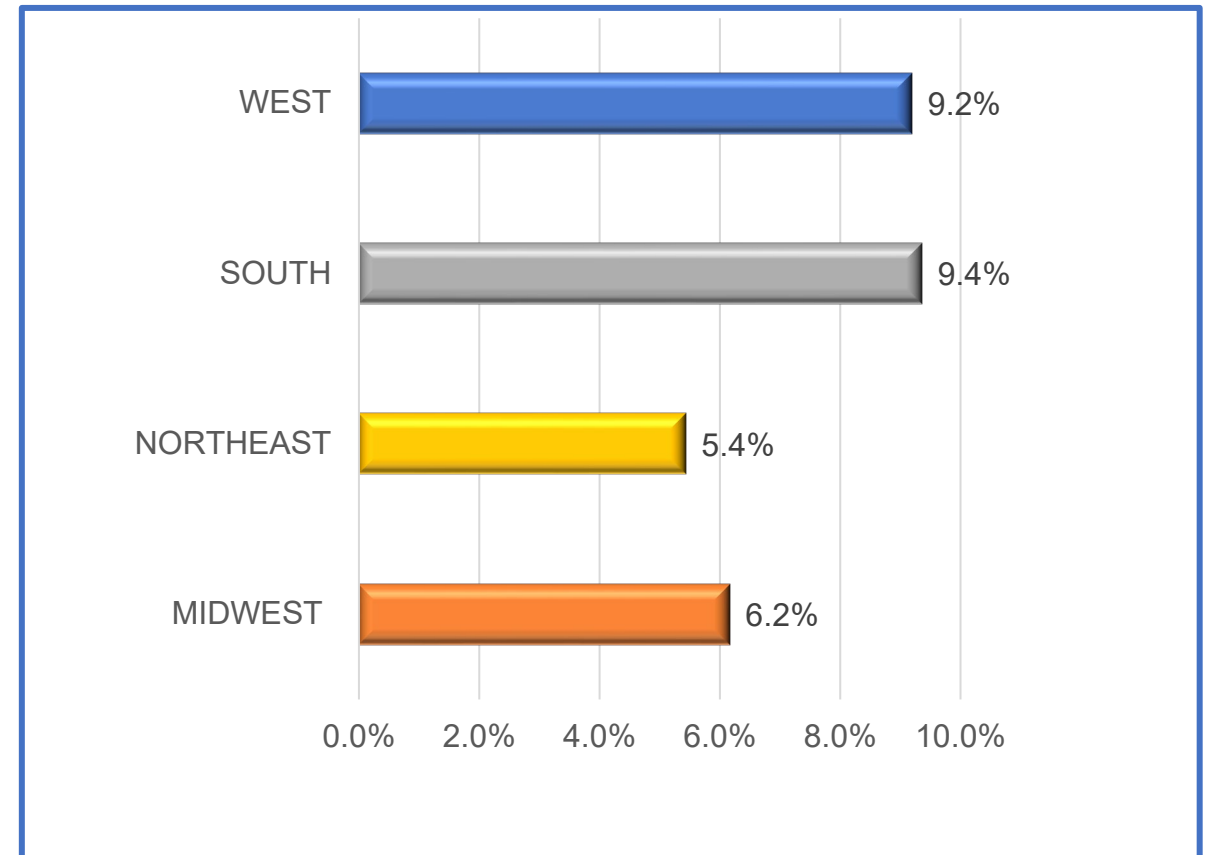
- Total Natural Channel \$ volume for the Packaged Fruit subcategory is \$1.12B and is up 8.0% over the prior year.
- The West region is the largest \$ volume region, followed by the South, Midwest, and Northeast, respectively.
- All four census regions and Total US are posting sales greater than the prior year.

# Natural Channel: Packaged Fruit - By Region

Natural Channel Dollars and % Category Share by Region



% Dollar Change vs Year Ago



- The West region is the most highly developed region for this subcategory, responsible for 47% of \$ volume, and is up 9.2% over the prior year.
- The 3 remaining regions, Northeast, South, and Midwest, are responsible for the remaining 53% of \$ volume, with respective growth of 5.4%, 9.4%, and 6.2%. The West experienced the highest % growth among the regions, followed by the South.

# Natural Channel: Packaged Fruit Subcategory Top 10 Brands Northeast Census Region

Description	Dollars %				Units +/-		Units %		Avg % ACV	TDP	TDP, Yago	Average		ARP, Yago
	Dollars	Dollars, Yago	Dollars +/- Chg, Yago	Chg, Yago	Units	Units, Yago	Chg, Yago	Chg, Yago				Items Selling	ARP	
<b>PRODUCE PACKAGED FRUIT</b>	<b>\$203,641,897</b>	<b>\$193,142,659</b>	<b>\$10,499,238</b>	<b>5.4</b>	<b>37,673,987</b>	<b>36,790,030</b>	<b>883,957</b>	<b>2.4</b>		<b>\$6,844.60</b>	<b>\$6,712.80</b>		<b>\$5.41</b>	<b>\$5.25</b>
DRISCOLLS	\$86,942,784	\$84,949,871	\$1,992,913	2.3	14,864,275	14,656,926	207,349	1.4	93.7	\$962.60	\$1,028.90	10.1	\$5.85	\$5.80
NATURIPE	\$10,303,269	\$9,011,374	\$1,291,894	14.3	1,788,579	1,589,201	199,379	12.5	57.3	\$219.80	\$224.50	2.7	\$5.76	\$5.67
STEMILT	\$9,902,017	\$8,412,452	\$1,489,565	17.7	1,264,740	1,010,821	253,920	25.1	54.1	\$440.80	\$417.10	6.8	\$7.83	\$8.32
PARAMOUNT CITRUS	\$8,898,948	\$7,984,369	\$914,580	11.5	1,444,742	1,707,916	-263,174	-15.4	45.5	\$121.50	\$131.40	1.8	\$6.16	\$4.67
FAMILY TREE FARMS	\$4,854,248	\$2,856,918	\$1,997,330	69.9	597,105	383,768	213,337	55.6	18	\$117.80	\$104.00	2.8	\$8.13	\$7.44
NOBRAND	\$4,530,554	\$3,147,313	\$1,383,241	43.9	831,974	637,480	194,494	30.5	61.9	\$291.60	\$239.60	3.6	\$5.45	\$4.94
PRIVATE LABEL	\$3,261,520	\$1,846,773	\$1,414,747	76.6	805,186	446,248	358,939	80.4	22.8	\$220.80	\$200.10	7.6	\$4.05	\$4.14
WONDERFUL HALOS	\$2,728,503	\$1,712,602	\$1,015,901	59.3	395,667	250,785	144,882	57.8	21.9	\$53.80	\$49.30	1.3	\$6.90	\$6.83
DOLE	\$2,294,130	\$2,611,611	-\$317,481	-12.2	1,300,412	1,391,944	-91,532	-6.6	44.7	\$127.60	\$134.80	2	\$1.76	\$1.88
SUNKIST	\$2,204,589	\$2,309,236	-\$104,647	-4.5	610,770	516,397	94,373	18.3	48.2	\$215.70	\$217.20	3.1	\$3.61	\$4.47

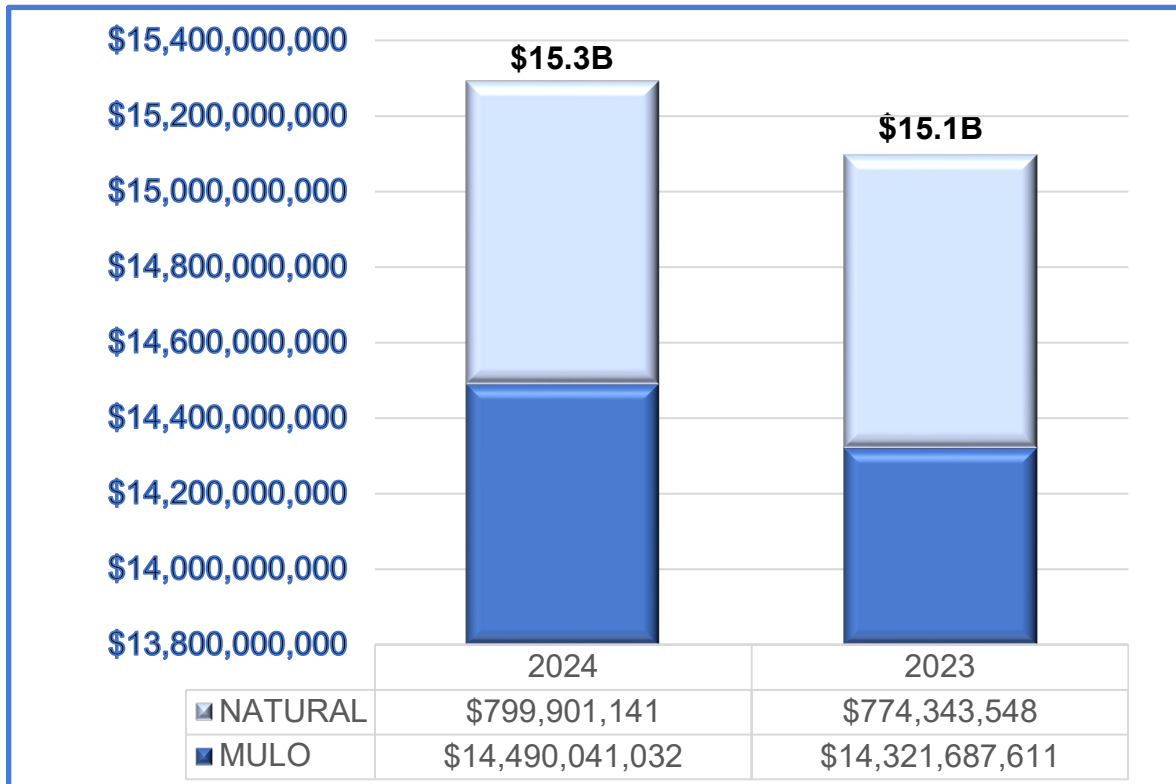
- Natural Channel, Northeast Packaged Fruit, is showing 5.4% growth, over prior year in \$ sales in the Northeast, and is also positive in unit sales, at 2.4%. Increase in price is driving \$ sales increases.
- Driscoll's is the largest \$ volume brand, garnering 43% of the subcategory \$ sales, and is positive in both dollar and unit volume to the prior year.
- Family Tree Farms is the fastest-growing brand in \$ volume and is the highest-growth brand in the subcategory.
- Private Label, in the Natural Channel, is developing in both \$ and unit growth at a very high rate.

# Subcategory Performance Packaged Vegetables

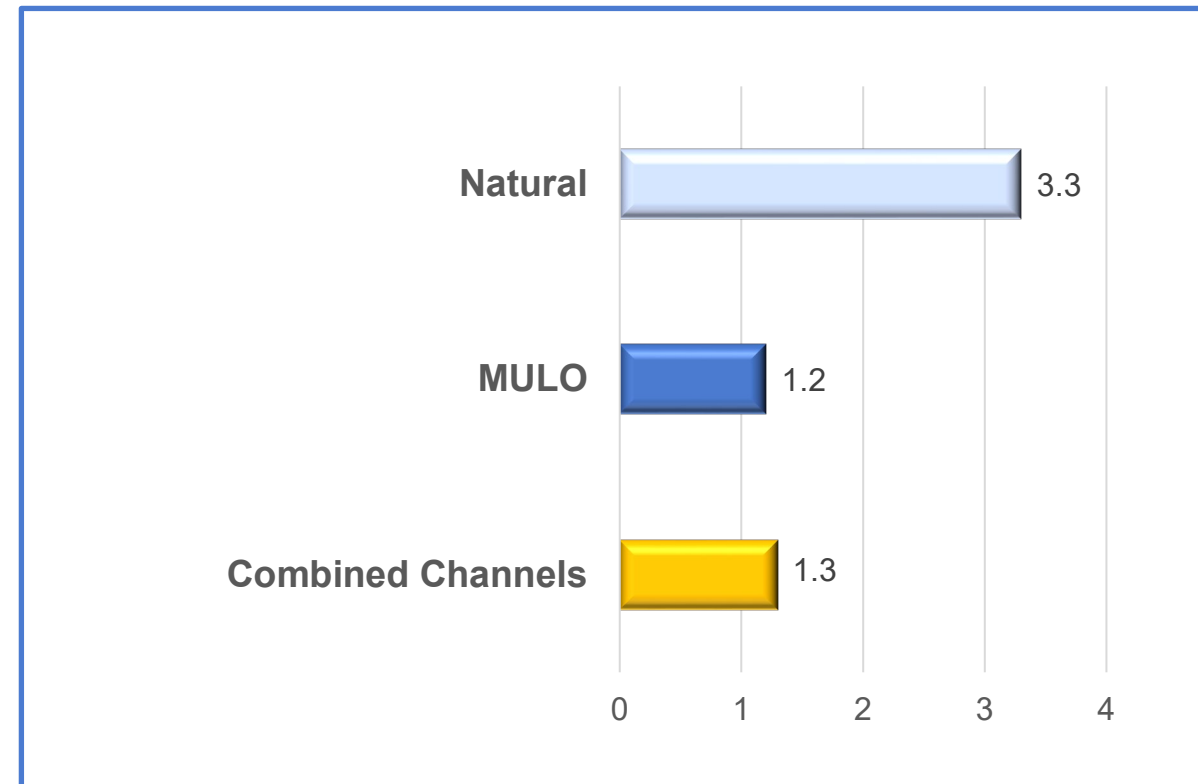
*SPINS Satori - 52 Weeks Ending 9-8-24*

# Total US Packaged Vegetables Subcategory

Total US Dollars



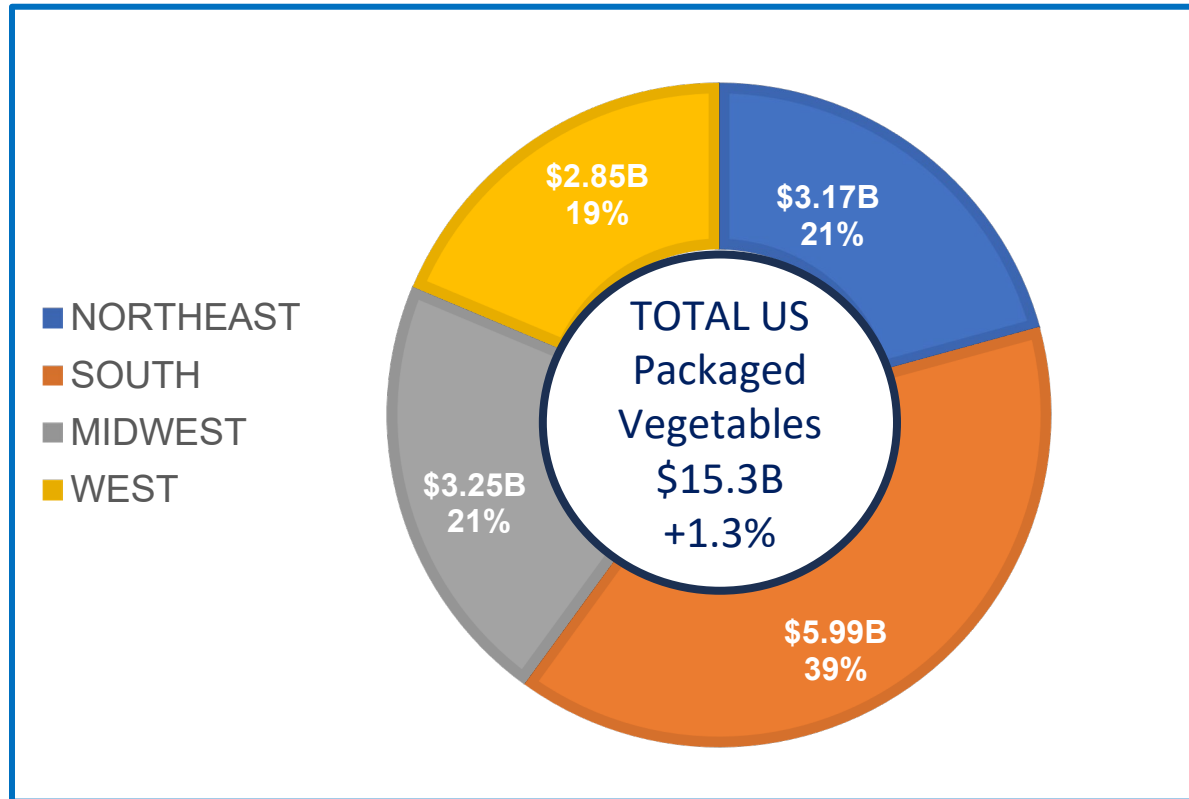
% Dollar Change vs Year Ago



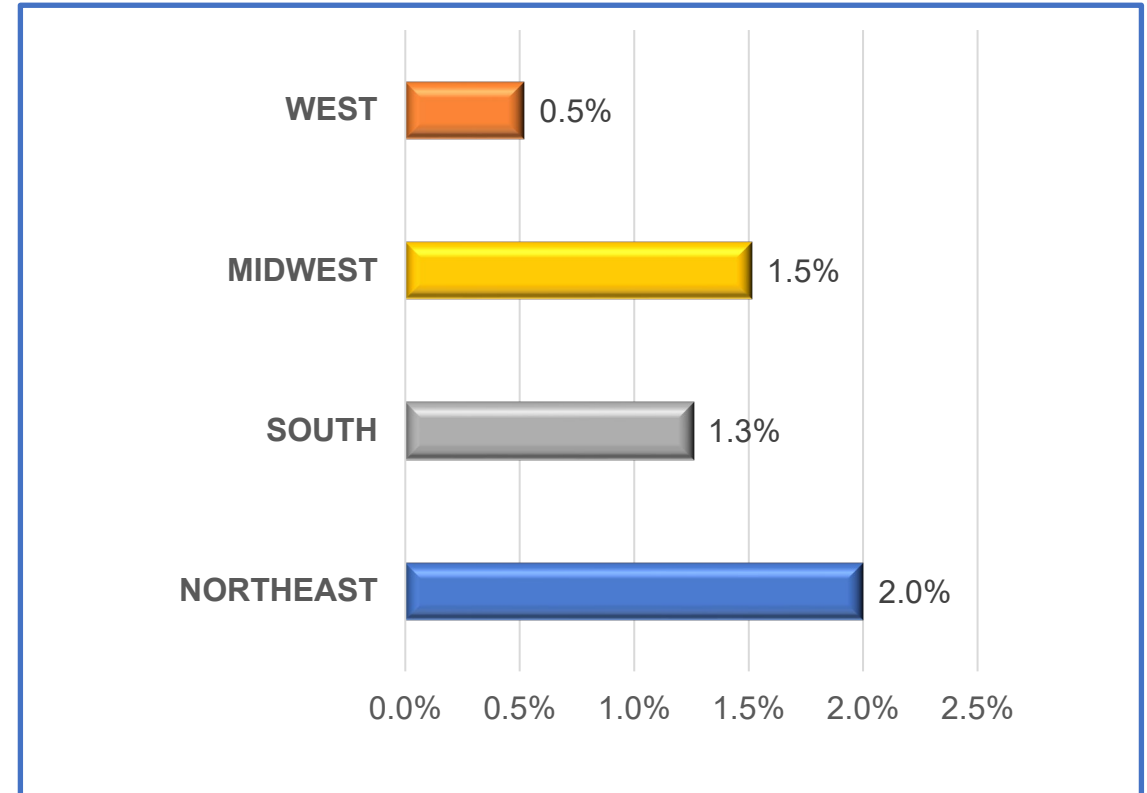
- Total US Packaged Vegetables is a \$15.3B Category and is in modest growth to prior year by 1.3%.
- Sales dollars were up in the Natural Channel (+3.3%) and growing in MULO (+1.2%).

# Total US Packaged Vegetables - By Region

Total Dollars and % Category Share by Region



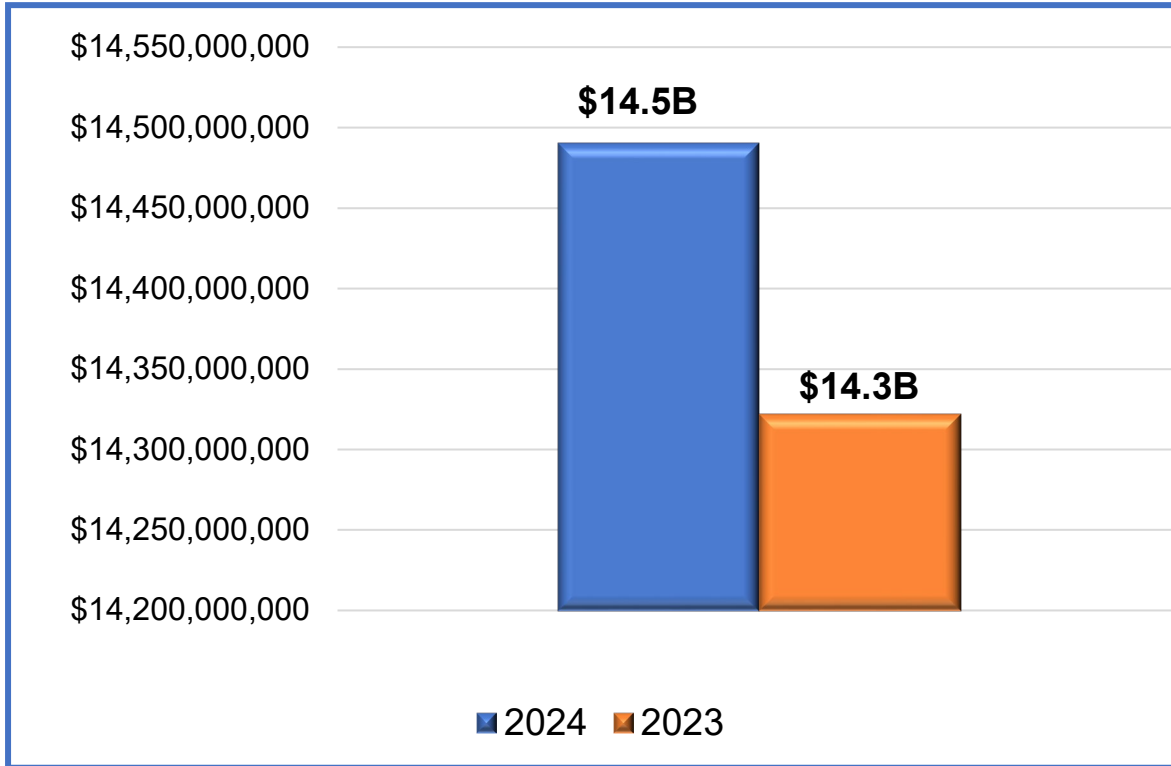
% Dollar Change vs Year Ago



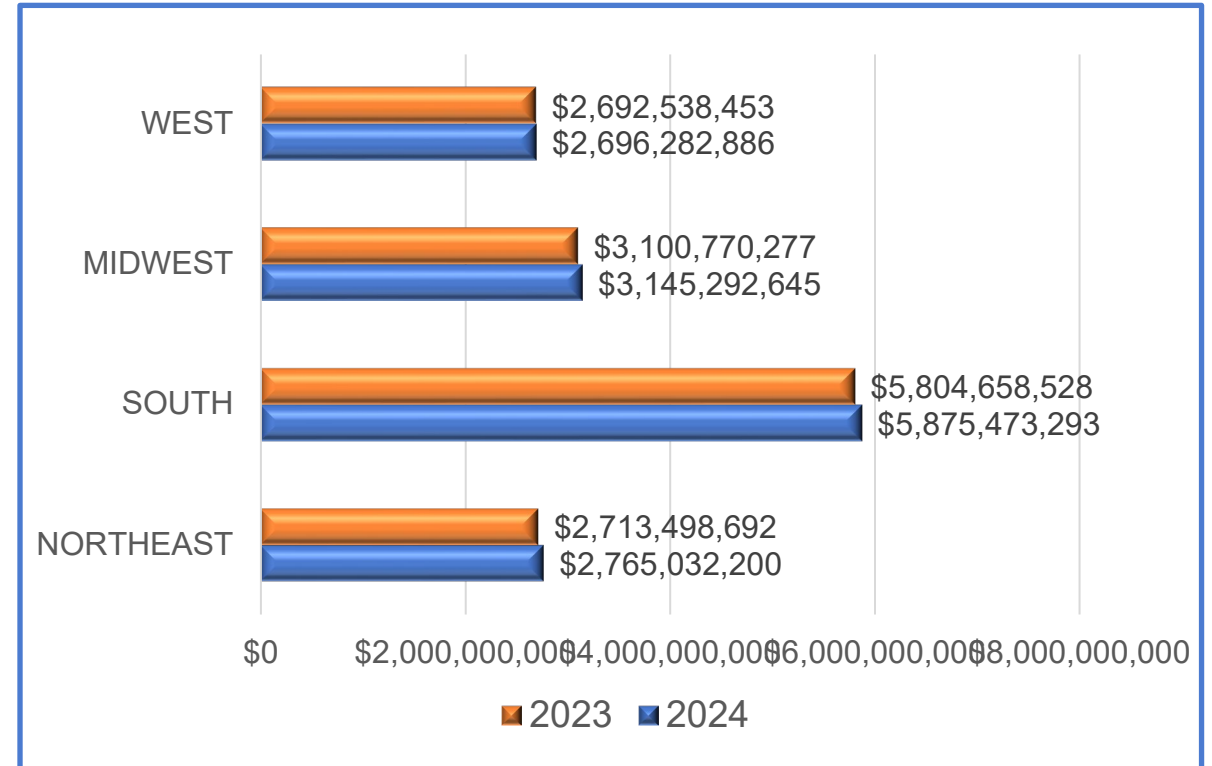
- The South region is the most highly developed region for this sub-category, responsible for 39% of \$ volume, with dollar growth of 1.3%, year over year.
- The 3 remaining regions, West, South and Midwest, are responsible for the remaining \$ volume, with respective growth of 0.5%, 1.3%, and 1.5%.

# Total US MULO: Frozen Packaged Vegetables Subcategory

MULO Total US Dollars



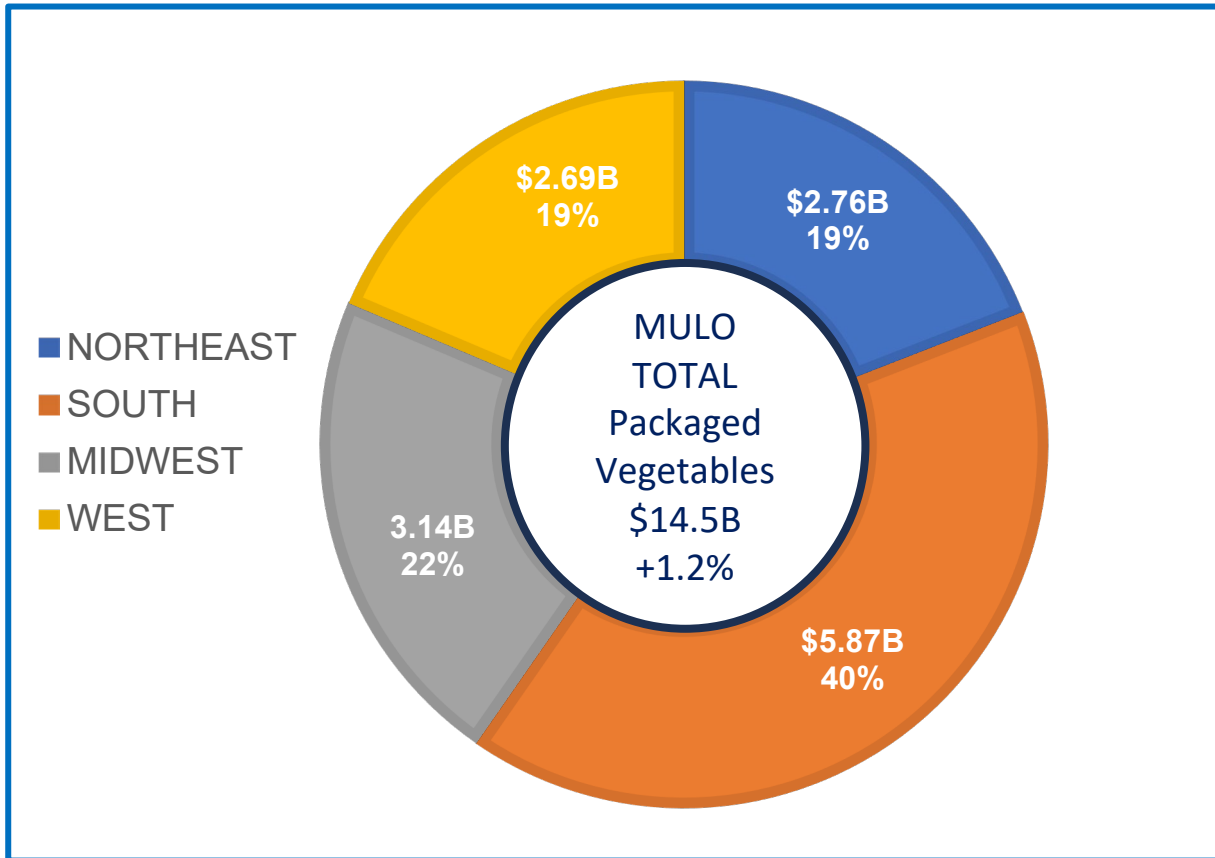
Dollar Change vs Year Ago



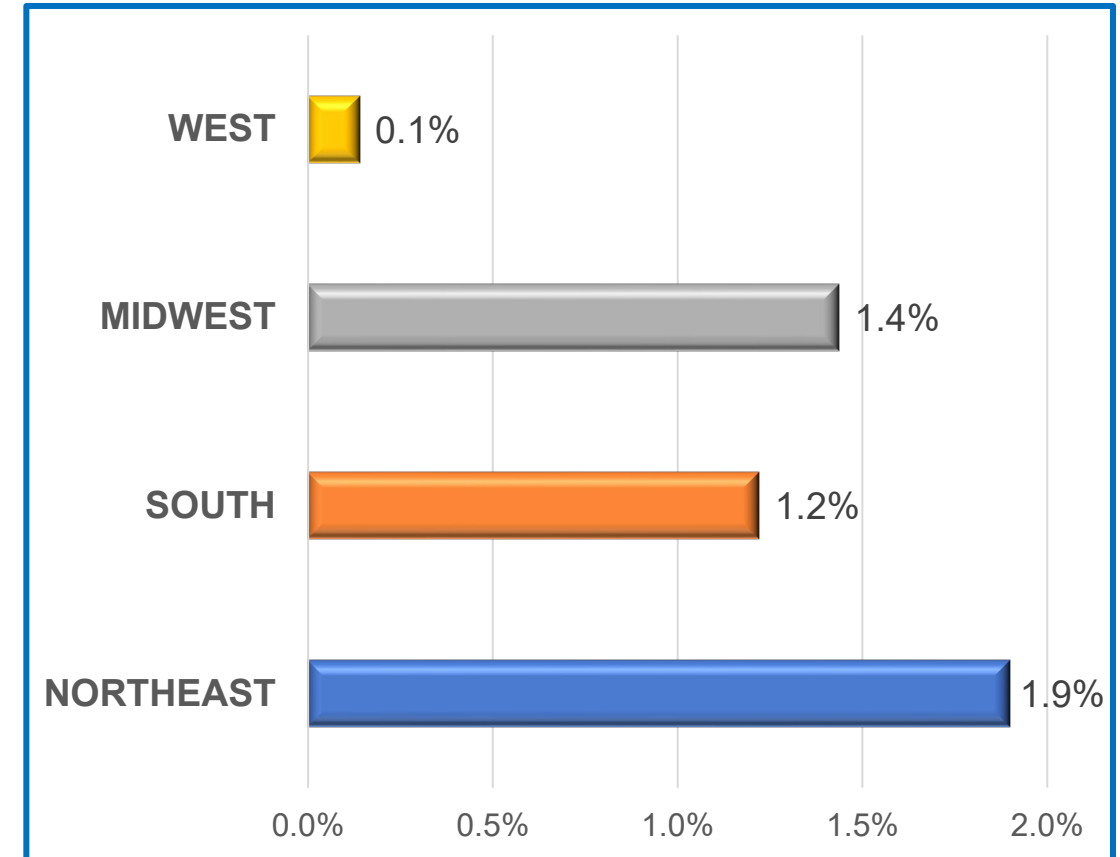
- Total US MULO \$ volume for Packaged Vegetables is \$14.5B and is in modest growth 1.2% over prior year.
- The South region is the largest \$ volume region, followed by the Midwest, Northeast and West, respectively.
- All four census regions and Total US post sales greater than the prior year.

# MULO: Packaged Vegetables Subcategory

MULO Dollars and % Category Share by Region



% Dollar Change vs Year Ago



- The South region is the most highly developed region for this subcategory, responsible for 40% of \$ volume, with growth of 1.2%.
- The 3 remaining regions, West, Northeast, and Midwest, are responsible for the remaining 60% of \$ volume, with respective growth of 0.1%, 1.9%, and 1.4%.

# MULO: Packaged Vegetables

## Top 10 Brands Northeast Census Region

Description	Dollars %				Units %				Average		ARP, Yago			
	Dollars	Dollars, Yago	Dollars +/- Chg, Yago	Chg, Yago	Units	Units, Yago	Units +/- Chg, Yago	Chg, Yago	Avg % ACV	TDP, Yago		Items Selling		
<b>PRODUCE PACKAGED VEGETABLES</b>	<b>\$2,765,032,200</b>	<b>\$2,713,498,692</b>	<b>\$51,533,508</b>	<b>1.9</b>	<b>859,216,240</b>	<b>838,446,408</b>	<b>20,769,832</b>	<b>2.5</b>		<b>\$11,379</b>	<b>\$11,419</b>		<b>\$3.22</b>	<b>\$3.24</b>
PRIVATE LABEL	\$1,198,718,887	\$1,167,121,625	\$31,597,261	2.7	374,472,526	365,016,758	9,455,768	2.6	87.5	\$3,721	\$3,767	41.8	\$3.20	\$3.20
NOBRAND	\$421,713,216	\$428,913,194	-\$7,199,977	-1.7	152,721,065	152,535,480	185,585	0.1	84.1	\$1,350	\$1,388	15.8	\$2.76	\$2.81
SUNSET	\$263,382,584	\$251,285,287	\$12,097,296	4.8	67,872,797	64,860,583	3,012,213	4.6	72.8	\$857	\$841	10.8	\$3.88	\$3.87
NATURESWEET	\$106,537,711	\$102,465,978	\$4,071,734	4	29,666,313	28,049,031	1,617,282	5.8	59	\$271	\$286	4.5	\$3.59	\$3.65
PRIVATE LABEL ORGANIC	\$99,226,204	\$100,043,249	-\$817,045	-0.8	27,139,793	27,699,787	-559,995	-2	67.4	\$673	\$705	9.8	\$3.66	\$3.61
THE LITTLE POTATO COMPANY	\$48,360,250	\$41,086,413	\$7,273,837	17.7	11,174,086	9,489,000	1,685,085	17.8	62.8	\$279	\$234	4.3	\$4.33	\$4.33
GIORGIO	\$46,603,829	\$41,543,512	\$5,060,317	12.2	21,487,774	18,962,894	2,524,880	13.3	28.9	\$123	\$101	3.6	\$2.17	\$2.19
GREEN GIANT FRESH	\$39,145,516	\$48,167,603	-\$9,022,088	-18.7	11,919,500	12,832,539	-913,040	-7.1	34.3	\$171	\$233	3.6	\$3.28	\$3.75
PERO	\$36,833,271	\$33,068,595	\$3,764,676	11.4	8,075,408	7,214,330	861,078	11.9	47.5	\$203	\$201	3.7	\$4.56	\$4.58
NATURE FRESH FARMS	\$20,830,360	\$18,449,929	\$2,380,431	12.9	6,572,931	5,681,969	890,962	15.7	19	\$98	\$93	3.4	\$3.17	\$3.25

- Packaged Vegetables, the 2<sup>nd</sup> largest subcategory in MULO, is growing at 1.9% in \$ volume over the prior year in the Northeast and in units at 2.5% greater than the prior year.
- Private Label is leading within this subcategory in the Northeast, with \$1.19BM in \$ volume, growing +2.7%, and is also growing in unit volume, at +2.6%.
- Sunset, ranking 3<sup>rd</sup> in this subcategory in overall \$ volume, is registering 4.8% growth in dollar volume and is showing a 4.6% growth in unit volume, year over year.
- The Little Potato company, the 6<sup>th</sup> largest player in this segment, is the fastest growing in dollar and unit volume, respectively, at +17.7 and +17.8%.

# MULO: Packaged Vegetables

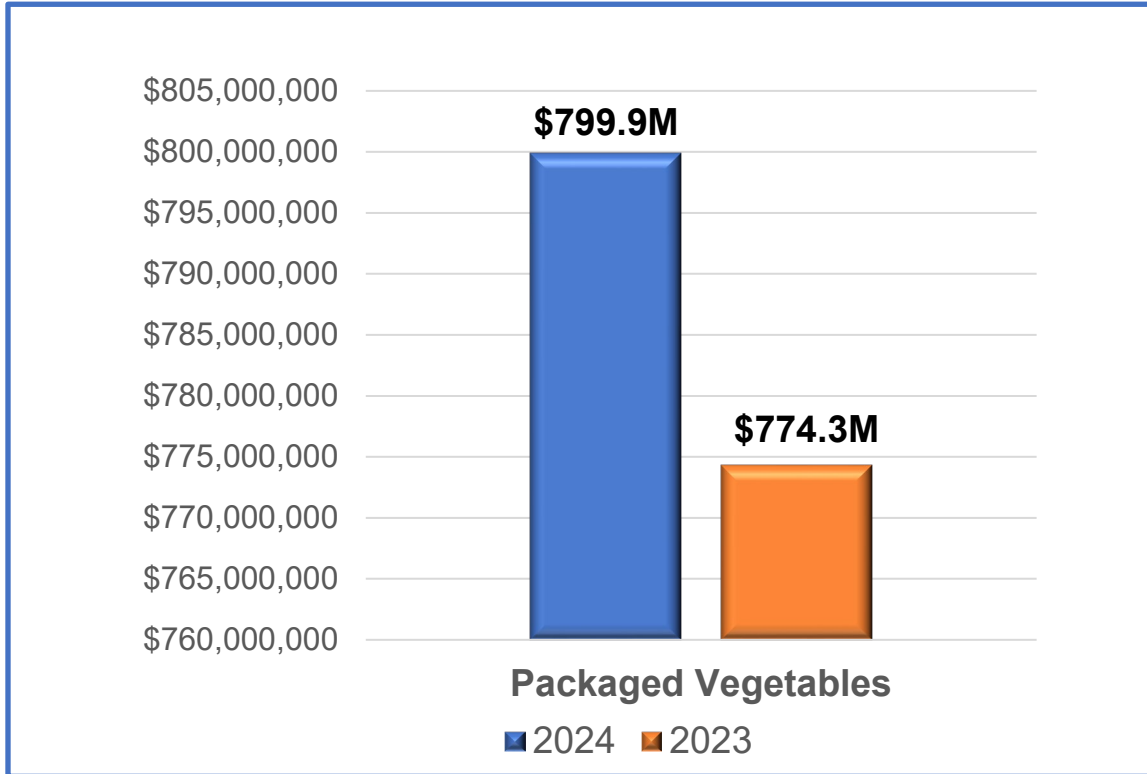
## Top Markets Northeast Census Region

Geography	Dollars %				Units %				TDP	TDP, Yago	ARP	ARP, Yago
	Dollars	Dollars, Yago	Dollars +/- Chg, Yago	Chg, Yago	Units	Units, Yago	Units +/- Chg, Yago	Chg, Yago				
NEW YORK, NY - MULO	786,467,866	761,777,071	24,690,795	3.2	235,148,857	226,876,873	8,271,984	3.6	\$11,183	\$11,413	\$3.34	\$3.36
BALTIMORE, MD/WASHINGTON D.C. - MULO	467,374,644	464,257,039	3,117,605	0.7	147,815,697	145,559,530	2,256,167	1.5	\$12,551	\$12,674	\$3.16	\$3.19
PHILADELPHIA, PA - MULO	328,794,851	327,569,081	1,225,771	0.4	105,610,104	103,699,816	1,910,288	1.8	\$12,453	\$12,377	\$3.11	\$3.16
BOSTON, MA - MULO	243,941,335	240,388,340	3,552,995	1.5	72,546,389	71,836,120	710,269	1	\$9,391	\$9,586	\$3.36	\$3.35
HARRISBURG/SCRANTON, PA - MULO	235,590,272	233,689,929	1,900,343	0.8	75,353,881	73,794,928	1,558,953	2.1	\$12,603	\$13,364	\$3.13	\$3.17
NEW ENGLAND - MULO	209,066,880	200,499,643	8,567,237	4.3	64,249,955	61,716,743	2,533,212	4.1	\$10,144	\$10,126	\$3.25	\$3.25
HARTFORD, CT/SPRINGFIELD, MA - MULO	201,188,124	197,173,746	4,014,378	2	62,893,997	61,571,185	1,322,812	2.1	\$12,569	\$12,778	\$3.20	\$3.20
BUFFALO/ROCHESTER, NY - MULO	161,285,418	161,064,232	221,186	0.1	53,016,293	52,397,656	618,637	1.2	\$12,679	\$12,498	\$3.04	\$3.07
PITTSBURGH, PA - MULO	141,688,985	141,340,607	348,378	0.2	44,313,047	43,528,992	784,055	1.8	\$12,456	\$14,142	\$3.20	\$3.25
ALBANY, NY - MULO	74,811,021	71,211,405	3,599,616	5.1	23,240,995	22,068,217	1,172,778	5.3	\$12,286	\$11,820	\$3.22	\$3.23
SYRACUSE, NY - MULO	74,680,416	74,266,861	413,554	0.6	24,353,881	24,050,143	303,738	1.3	\$12,560	\$12,222	\$3.07	\$3.09
PROVIDENCE, RI - MULO	51,290,010	50,149,207	1,140,803	2.3	16,318,274	16,042,744	275,531	1.7	\$11,406	\$12,178	\$3.14	\$3.13

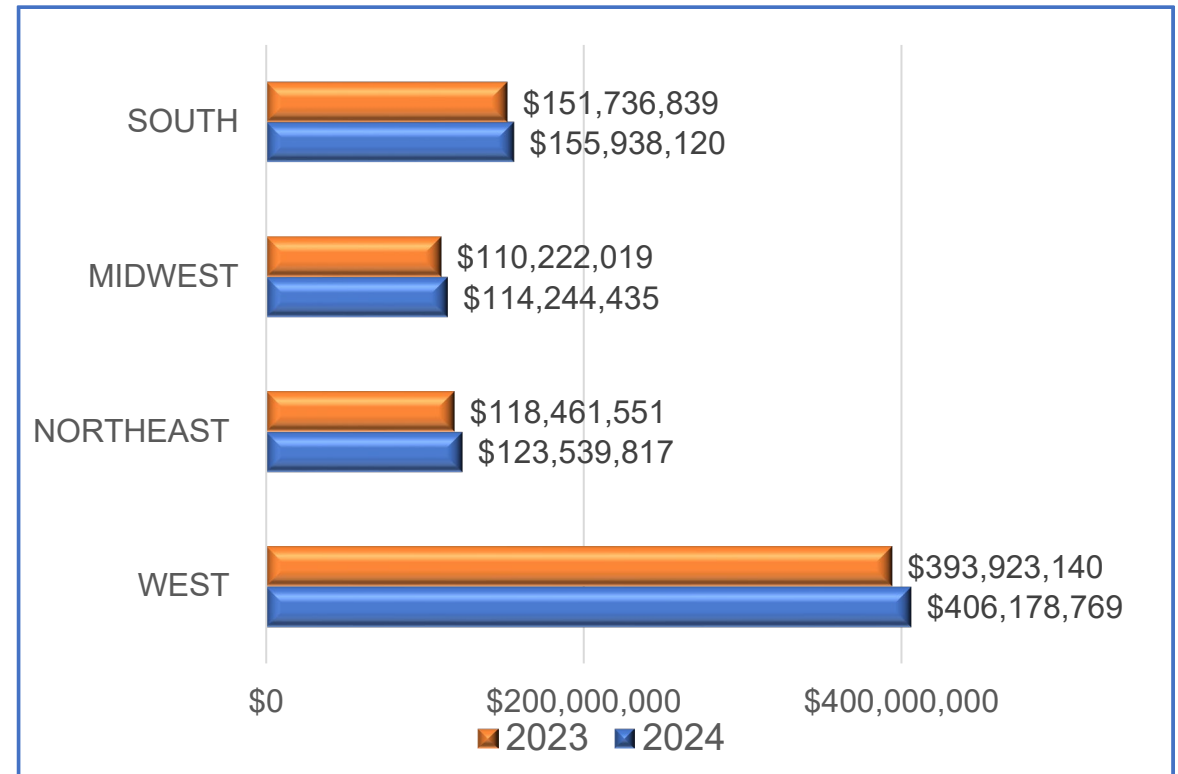
- New York is the largest market for Packaged Vegetables, posting positive \$ sales growth of 3.2% and an increase in unit growth of 3.6%.
- New England is responsible for \$209.0M in sales and is showing dollar growth of +4.3% and unit growth of 4.1%; the highest growth of all markets for both units and dollars.
- It is important to note that all markets are in growth mode for both units and dollars in this subcategory.

# Natural Channel: Packaged Vegetables - Subcategory

Natural Channel Total US Dollars



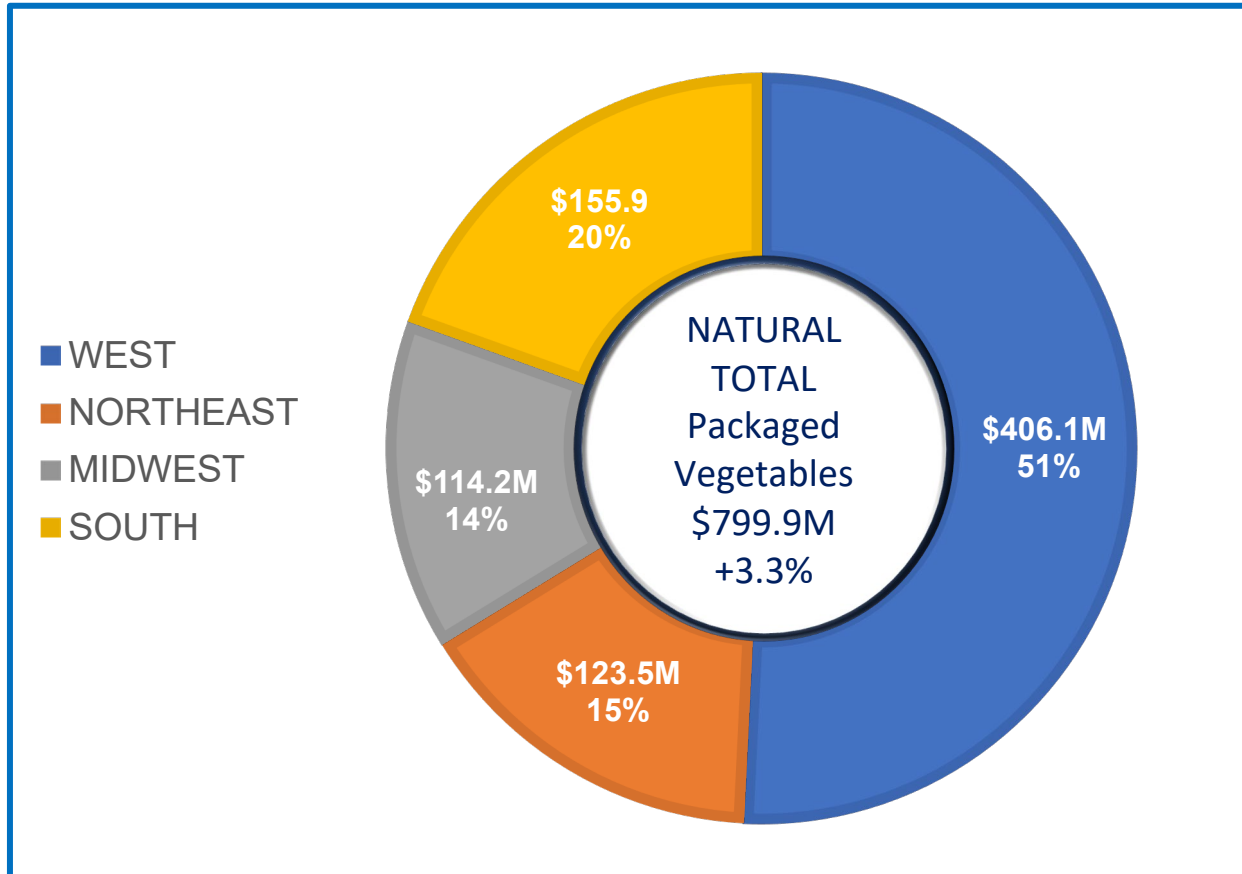
Dollar Change vs Year Ago



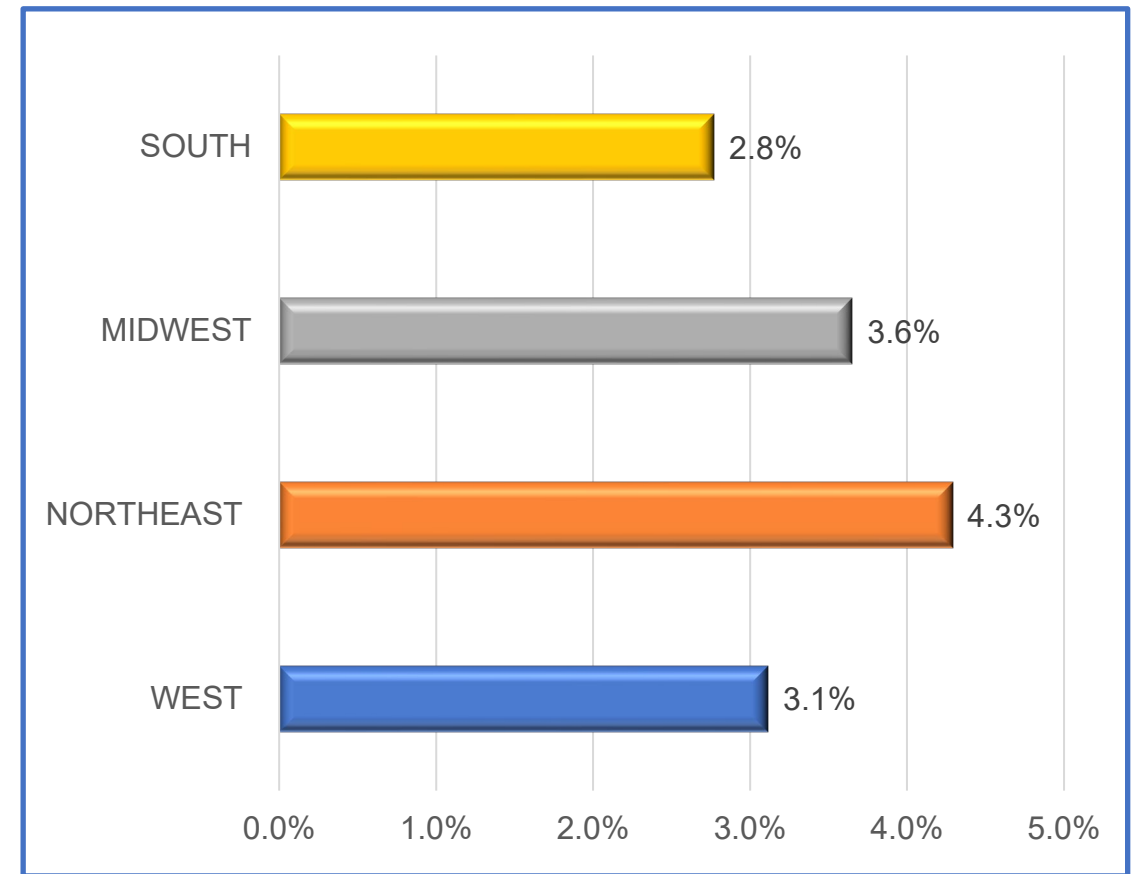
- Total Natural Channel \$ volume for Packaged Vegetables is \$7.99M and is up 3.3% over the prior year.
- The West region is the largest \$ volume region, followed by the South, Northeast, and Midwest, respectively.
- All 4 census regions and Total US post sales greater than the prior year.

# Natural Channel: Packaged Vegetables - By Region

Natural Channel Dollars and % Category Share by Region



% Dollar Change vs Year Ago



- The West region is the most highly developed region for this subcategory, responsible for 51% of \$ volume.
- The Northeast region, the 3<sup>rd</sup> largest market, is showing the highest \$ growth at 4.3%.
- The 3 remaining regions, South, Midwest, and West, are responsible for the remaining 49% of \$ volume, with respective growth of 2.8%, 3.6% and 3.1%.

# Natural Channel: Packaged Vegetables Top 10 Brands Northeast Census Region

Description	Dollars %				Units +/-		Units %		Average		ARP, Yago		
	Dollars	Dollars, Yago	Dollars +/- Chg, Yago	Chg, Yago	Units	Units, Yago	Chg, Yago	Chg, Yago	TDP, Yago	Items Selling			
<b>PRODUCE PACKAGED VEGETABLES</b>	<b>\$123,539,817</b>	<b>\$118,461,551</b>	<b>\$5,078,266</b>	<b>4.3</b>	<b>28,833,038</b>	<b>28,076,952</b>	<b>756,086</b>	<b>2.7</b>	<b>\$10,538</b>	<b>\$9,920</b>		<b>\$4.28</b>	<b>\$4.22</b>
SUNSET	\$9,906,308	\$6,660,372	\$3,245,936	48.7	1,870,686	1,258,647	612,039	48.6	\$568	\$463	7	\$5.30	\$5.29
PERO	\$8,746,518	\$7,868,966	\$877,552	11.2	1,664,618	1,488,641	175,977	11.8	\$554	\$474	6.8	\$5.25	\$5.29
PRIVATE LABEL	\$7,173,786	\$6,891,788	\$281,997	4.1	2,185,775	1,955,860	229,915	11.8	\$598	\$549	13.9	\$3.28	\$3.52
NATURESWEET	\$6,345,459	\$6,760,291	-\$414,832	-6.1	1,219,940	1,319,706	-99,766	-7.6	\$309	\$304	4.5	\$5.20	\$5.12
GIORGIO	\$4,199,905	\$4,642,630	-\$442,725	-9.5	1,210,775	1,333,337	-122,563	-9.2	\$455	\$440	7.9	\$3.47	\$3.48
TASTEFUL SELECTIONS	\$3,838,647	\$4,101,731	-\$263,084	-6.4	732,188	723,967	8,221	1.1	\$366	\$433	4.6	\$5.24	\$5.67
CALAVO	\$3,770,693	\$3,348,085	\$422,608	12.6	1,149,681	1,096,353	53,328	4.9	\$112	\$76	4.6	\$3.28	\$3.05
PRIVATE LABEL ORGANIC	\$3,392,543	\$2,969,351	\$423,192	14.3	1,085,160	929,453	155,707	16.8	\$278	\$273	10.8	\$3.13	\$3.19
GREEN GIANT FRESH	\$3,365,163	\$3,728,046	-\$362,882	-9.7	857,926	948,702	-90,776	-9.6	\$395	\$382	6.6	\$3.92	\$3.93
MOTHER EARTH ORGANIC MUSHROOMS	\$3,285,929	\$3,470,554	-\$184,625	-5.3	768,405	815,468	-47,063	-5.8	\$183	\$192	4.4	\$4.28	\$4.26

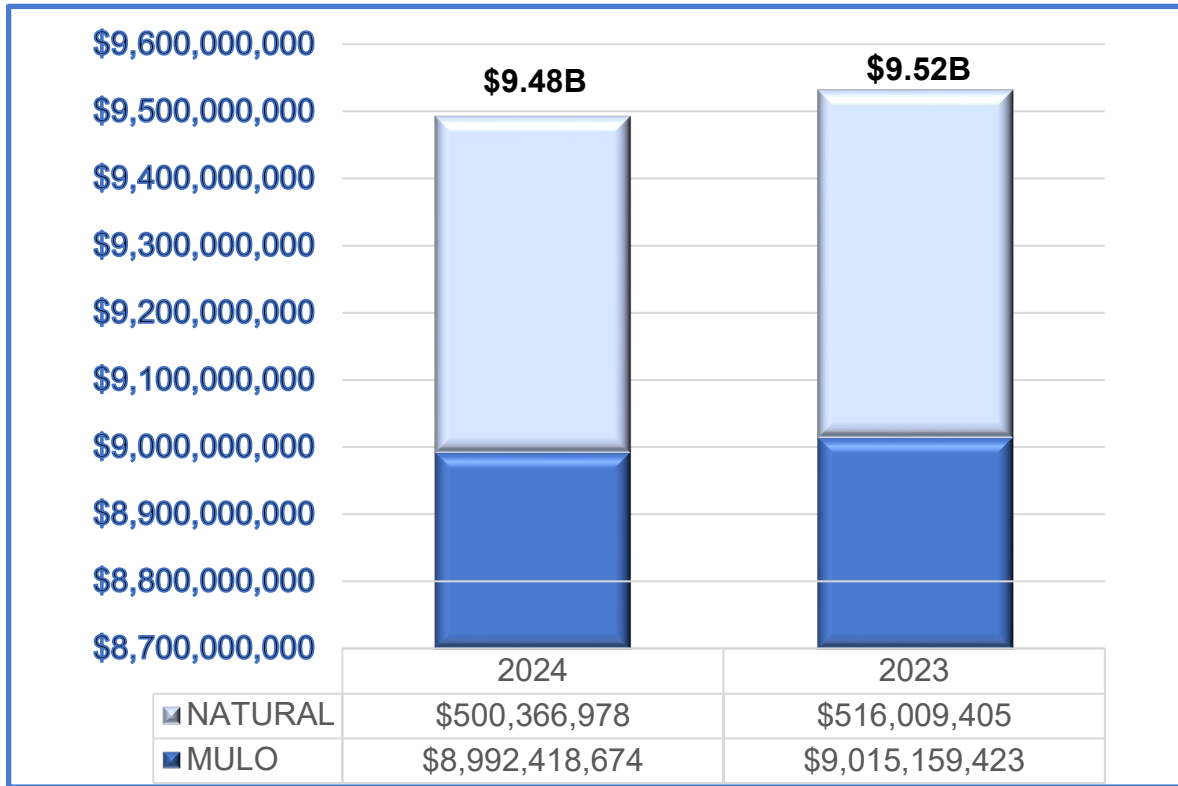
- Packaged Vegetables, the 2<sup>nd</sup> largest subcategory in the Natural Channel, is growing at 4.3% in \$ volume and 2.7% in unit volume to the prior year in the Northeast.
- Sunset, a \$9.90M brand in the Northeast, is showing very high dollar and unit growth at 48.7% and 48.6%, respectively.
- Private Label Organic, responsible for \$3.39M in dollar volume, is showing high dollar volume and unit volume growth at 14.3% and 16.8%, respectively.

# Subcategory Performance Packaged Salads & Greens

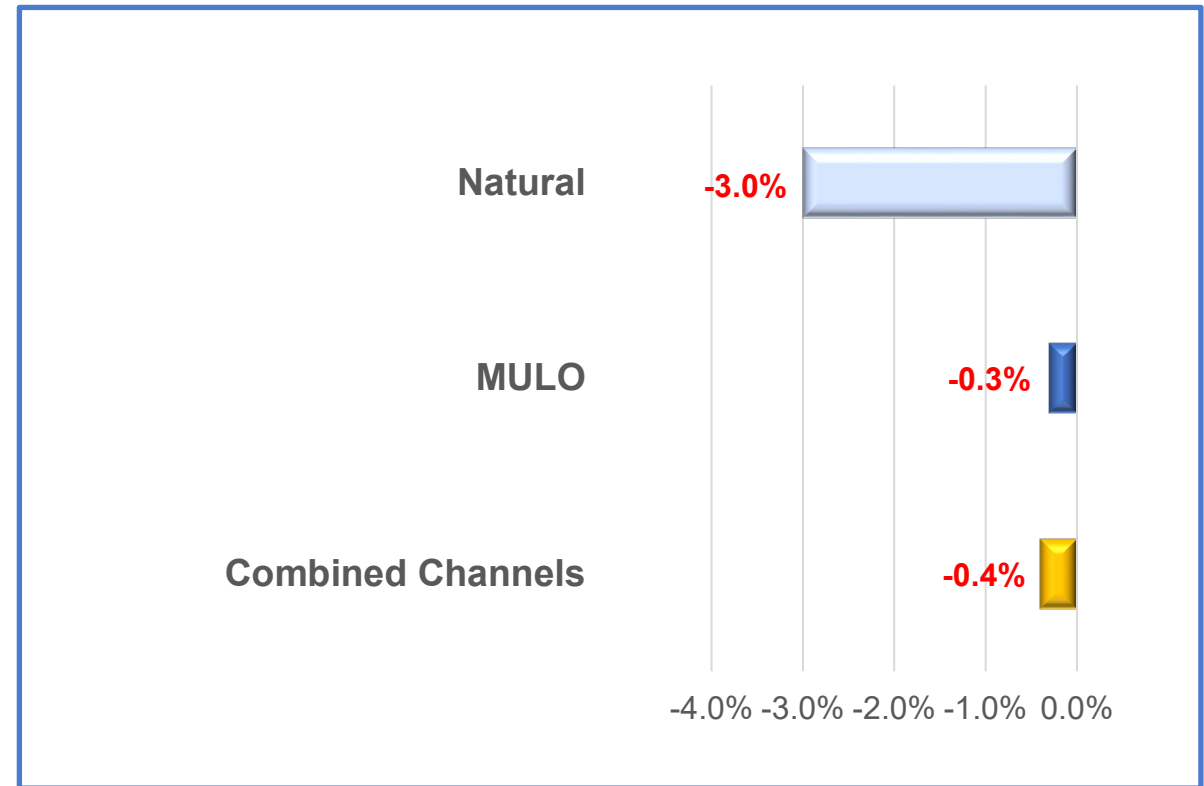
*SPINS Satori - 52 Weeks Ending 9-8-24*

# Total US Packaged Salads & Greens Subcategory

Total US Dollars



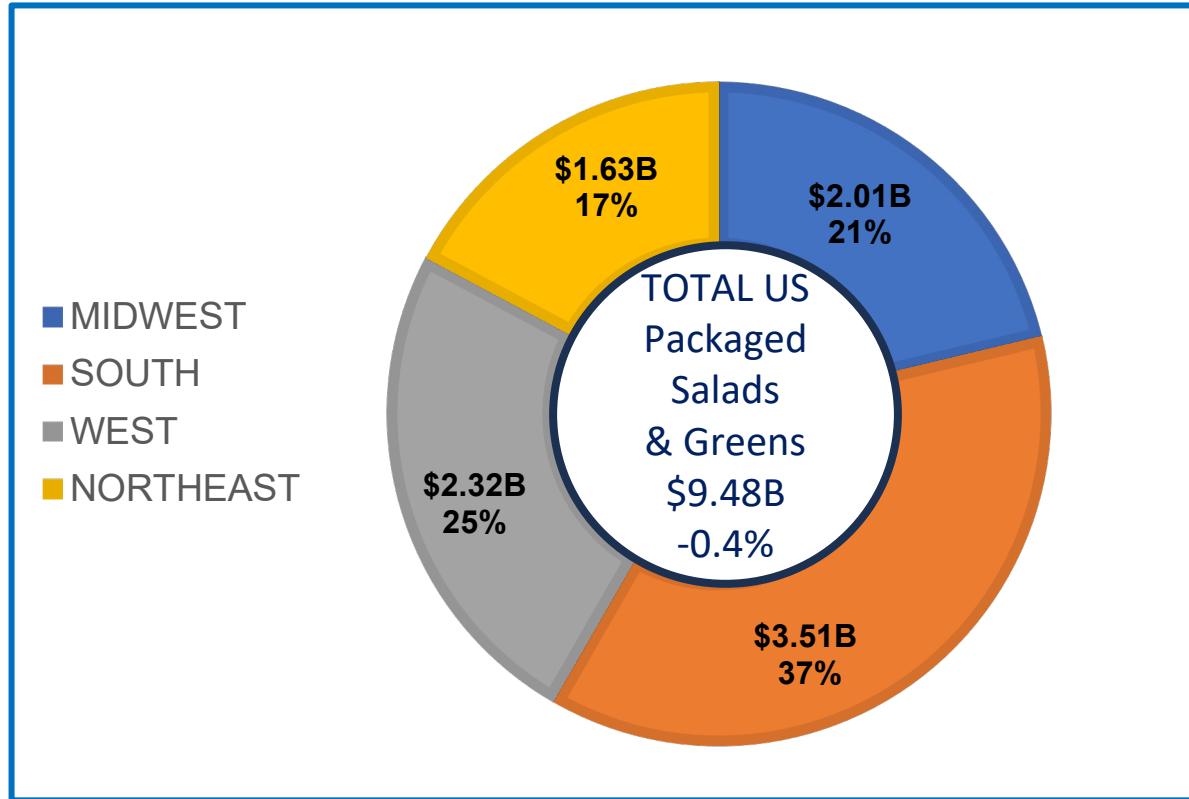
% Dollar Change vs Year Ago



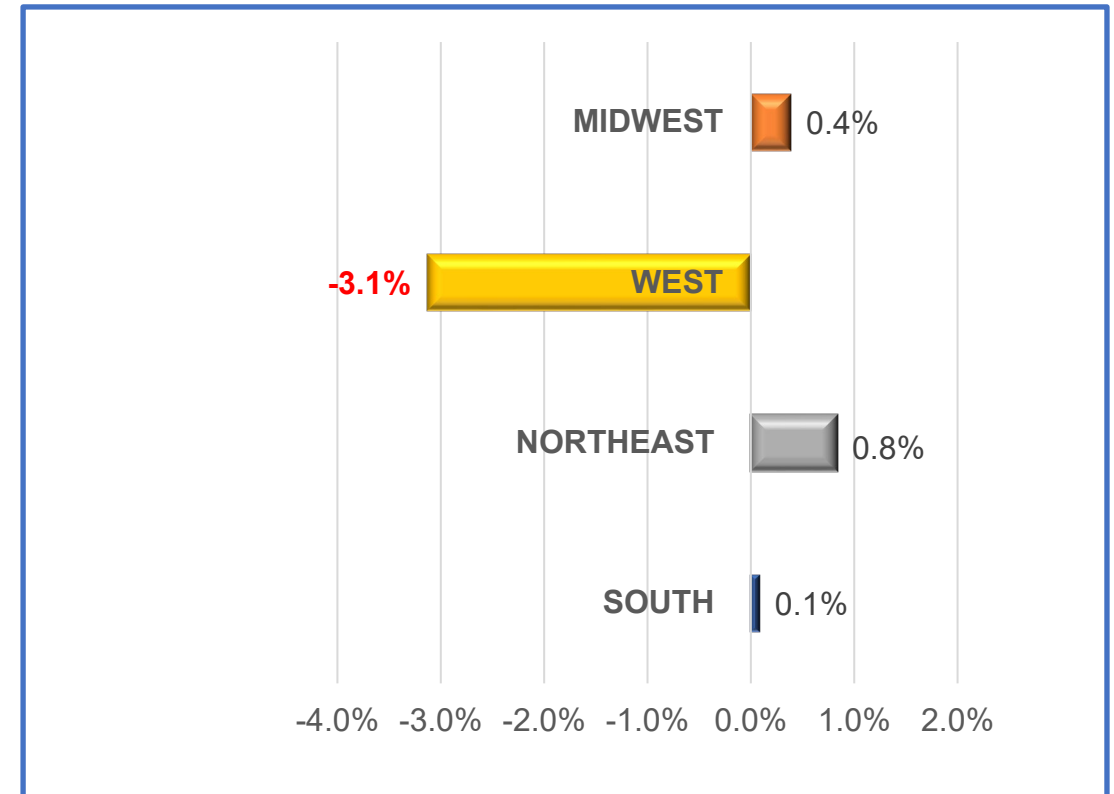
- Total US Packaged Salads & Greens is a \$9.48B Category and is in \$ dollar growth decline to the prior year by -0.4%.
- Sales dollars were down most in the Natural Channel (-3.0%) and slightly declined in MULO (-0.4%).

# Total US Packaged Salads & Greens Subcategory - By Region

Total Dollars and % Category Share by Region



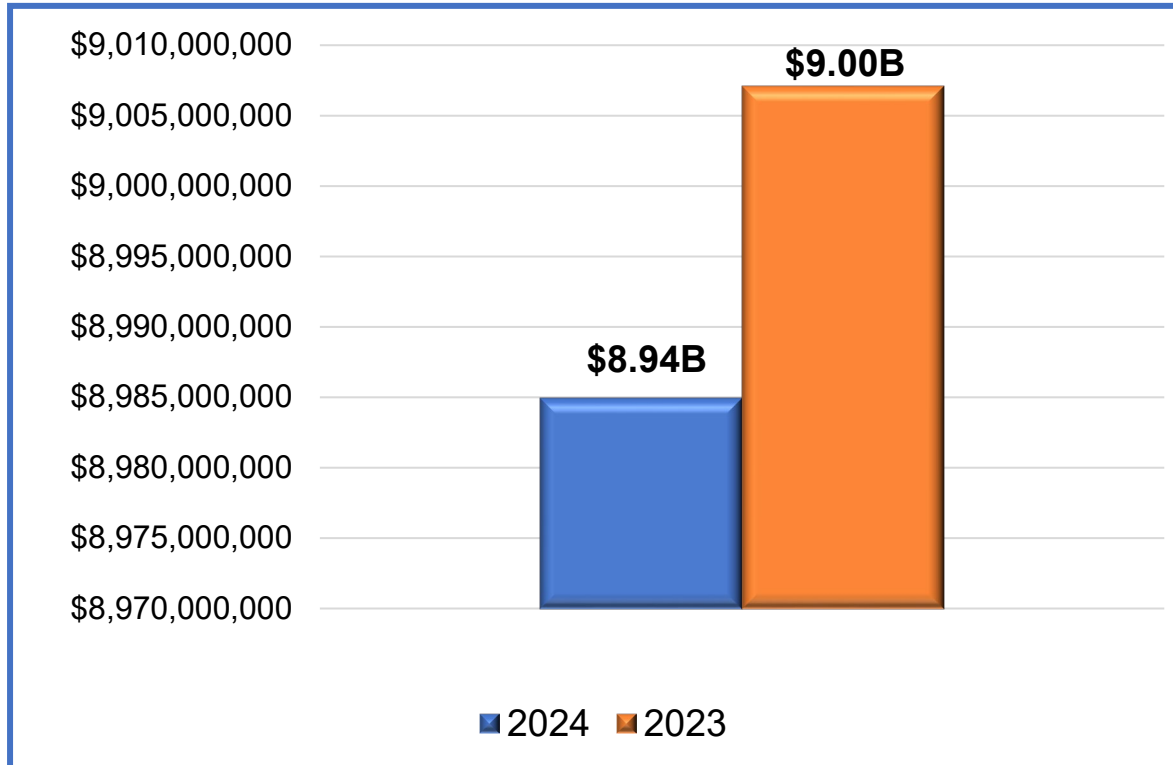
% Dollar Change vs Year Ago



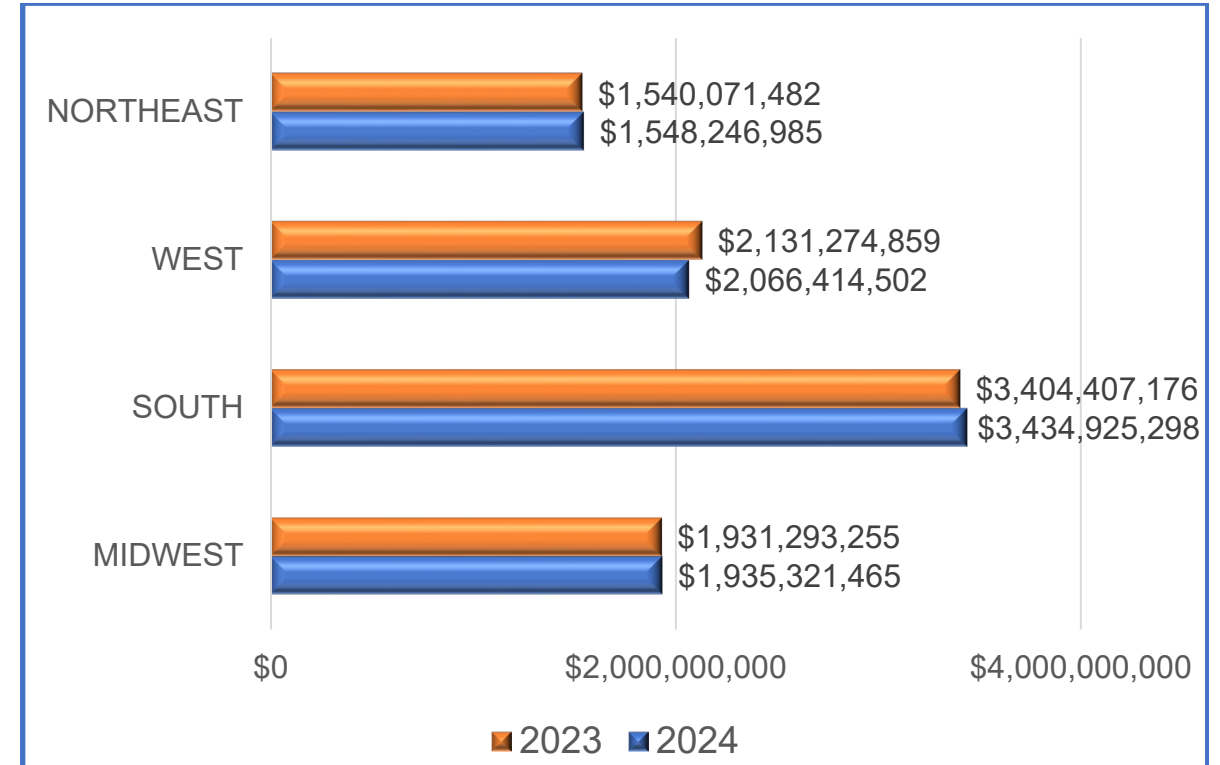
- The Packaged Salads & Greens subcategory has experienced flat sales, with a -0.4% % decline over the prior year.
- The South region is the most highly developed region for this subcategory and is responsible for 37% of \$ volume, with slight growth at +0.1%.
- The 3 remaining regions, West, Northeast, and Midwest, are responsible for the remaining 53% of \$ volume, with respective \$ growth/decline of -3.1%, 0.8%, and 0.4%.

# MULO: Packaged Salads & Greens

MULO Total US Dollars



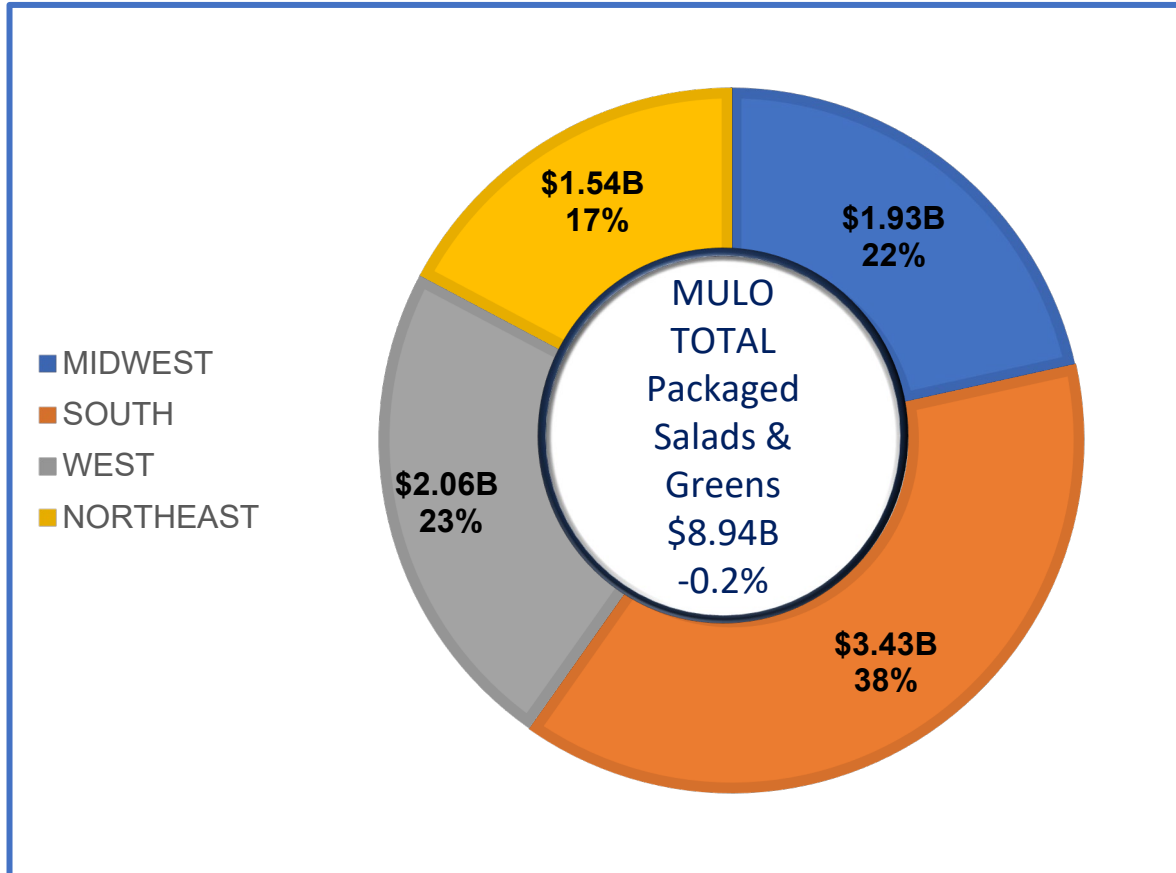
Dollar Change vs Year Ago



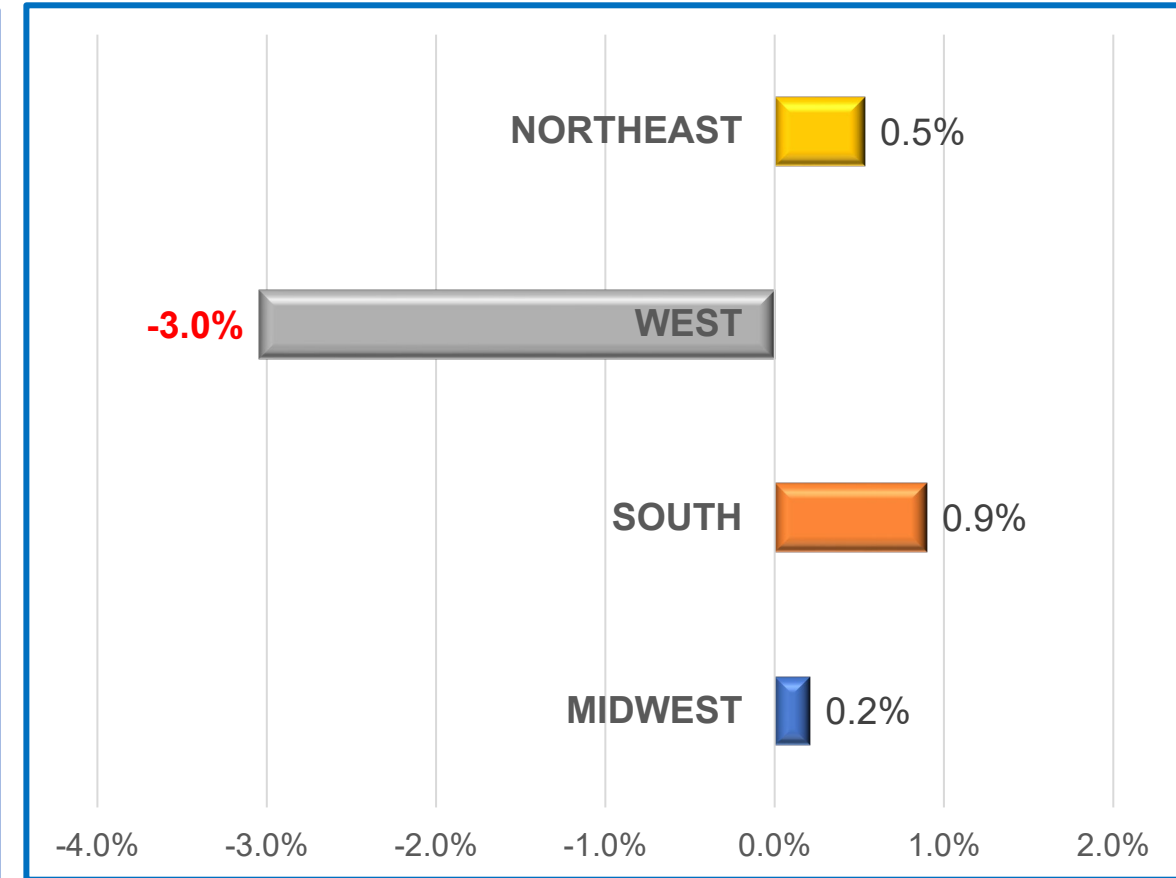
- Total US MULO \$ volume for Packaged Salads & Greens is \$8.94B, with a slight decline of -0.2% over the prior year.
- The South region is, by far, the largest \$ volume region, followed by West, Midwest, and Northeast, respectively.
- Of all 4 census regions, the West region is the only region that is posting sales less than the prior year.

# MULO: Packaged Salads & Greens - By Region

MULO Dollars and % Category Share by Region



% Dollar Change vs Year Ago



- The South region is the most highly developed region for this sub-category, responsible for 38% of \$ volume, with growth of 0.9%
- The 3 remaining regions, West, Northeast and Midwest, are responsible for the remaining 62% of \$ volume.
- Of the 3 remaining regions, the West region is the only region in decline in dollar volume, -3.0%, while the Midwest and Northeast regions show slight gains in dollar volume of 0.2% and 0.5%, respectively.

# MULO: Fresh Salads & Greens

## Top 10 Brands Northeast Census Region

Description	Dollars		Dollars +/-		Dollars %		Units +/-		Units %		Average		ARP		
	Dollars	Dollars, Yago	Chg, Yago	Chg, Yago	Units	Units, Yago	Chg, Yago	Chg, Yago	Yago	Avg %	TDP	TDP, Yago	Items Selling	ARP	Yago
<b>PRODUCE PACKAGED SALADS &amp; GREENS</b>	<b>\$1,548,246,985</b>	<b>\$1,540,071,482</b>	<b>\$8,175,502</b>	<b>0.5</b>	<b>452,096,976</b>	<b>444,857,431</b>	<b>7,239,545</b>	<b>1.6</b>			<b>\$6,569</b>	<b>\$6,318</b>		<b>\$3.42</b>	<b>\$3.46</b>
PRIVATE LABEL	\$483,821,949	\$464,423,801	\$19,398,148	4.2	159,740,150	153,568,295	6,171,855	4.0	74.7		\$1,776	\$1,690	23.3	\$3.03	\$3.02
FRESH EXPRESS	\$249,560,478	\$248,466,144	\$1,094,334	0.4	75,504,992	73,044,047	2,460,946	3.4	34		\$1,070	\$1,094	30.6	\$3.31	\$3.40
DOLE	\$149,091,395	\$166,026,137	-\$16,934,742	-10.2	46,312,596	51,685,128	-5,372,533	-10.4	36.9		\$681	\$734	16.5	\$3.22	\$3.21
PRIVATE LABEL ORGANIC	\$143,459,846	\$175,958,047	-\$32,498,201	-18.5	35,907,455	42,808,809	-6,901,354	-16.1	67.8		\$278	\$335	4.1	\$4.00	\$4.11
LITTLE LEAF FARMS	\$120,841,931	\$79,365,407	\$41,476,523	52.3	27,792,960	18,573,483	9,219,477	49.6	60.3		\$393	\$272	6.2	\$4.35	\$4.27
TAYLOR FARMS	\$84,903,691	\$65,525,372	\$19,378,319	29.6	24,421,535	19,297,335	5,124,200	26.6	64		\$682	\$575	9.8	\$3.48	\$3.40
NOBRAND	\$44,175,223	\$43,436,497	\$738,726	1.7	13,491,243	12,843,118	648,124	5.0	51.8		\$161	\$167	2.6	\$3.27	\$3.38
OLIVIAS ORGANICS	\$37,866,083	\$45,426,167	-\$7,560,084	-16.6	8,182,934	9,446,009	-1,263,075	-13.4	19.7		\$106	\$170	4.7	\$4.63	\$4.81
EARTHBOUND FARM	\$29,417,810	\$33,370,194	-\$3,952,384	-11.8	6,139,187	6,627,875	-488,688	-7.4	21.8		\$143	\$160	4.4	\$4.79	\$5.03
FOXY	\$25,009,224	\$32,899,730	-\$7,890,506	-24.0	6,617,345	7,931,296	-1,313,951	-16.6	25.3		\$74	\$64	1.8	\$3.78	\$4.15

- The MULO Packaged Salads & Greens subcategory is relatively flat in \$ volume, at 0.5% over the prior year in the Northeast, and is positive in unit volume, +1.6%.
- Private Label is the #1 brand in the subcategory and is far exceeding the overall subcategory growth, at 4.2 % in \$ volume and 4.0 % in unit volume.
- Fresh Express, is the largest brand and has marginal \$ growth in the subcategory, at 0.4% and unit growth of 3.4%.
- Little Leaf Farms, with dollar sales of \$120.8M, is growing most rapidly, + 52.3% in dollars and 40.6% in units.
- Taylor Farms, the 2<sup>nd</sup> fastest growing brand in both dollars and units, is showing \$ growth of 29.6% and unit growth of 26.6% to the prior year.

# MULO: Packaged Salads & Greens

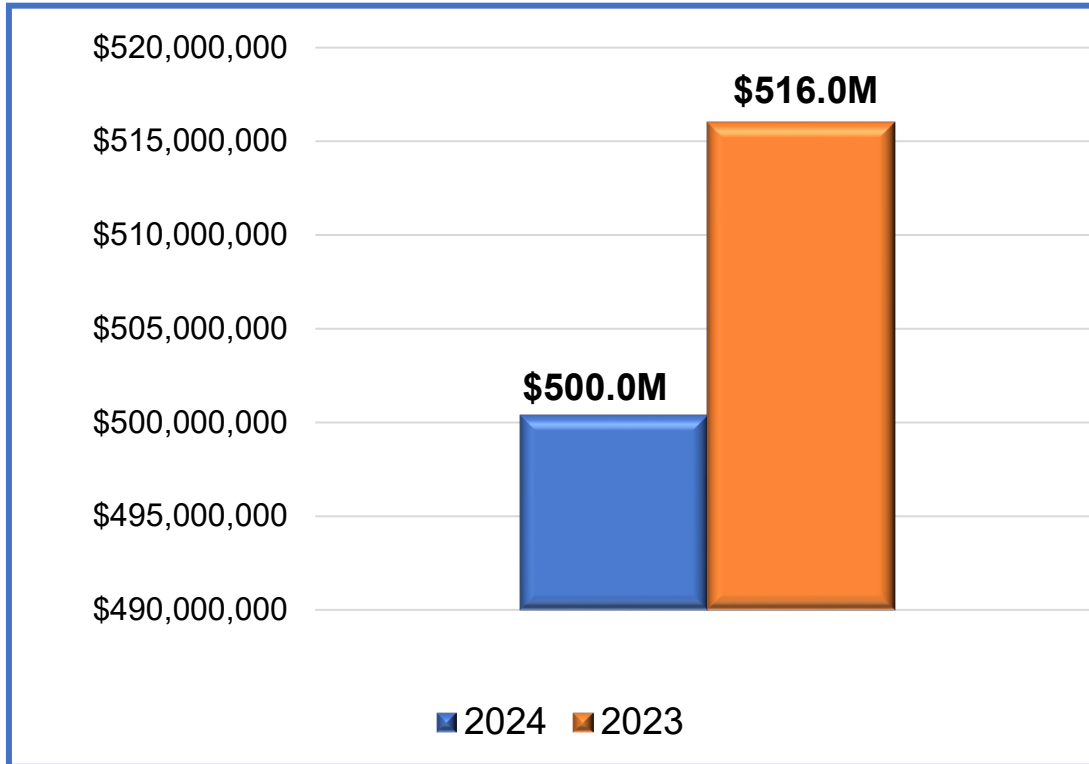
## Top Markets Northeast Census Region

Geography	Dollars +/-		Dollars %		Units +/-		Units %		TDP,		ARP,	
	Dollars	Dollars, Yago	Chg, Yago	Chg, Yago	Units	Units, Yago	Chg, Yago	Chg, Yago	TDP	Yago	ARP	Yago
NEW YORK, NY - MULO	\$443,612,245	\$450,518,472	-\$6,906,227	-1.5	124,154,201	123,528,453	625,748	0.5	\$7,038	\$6,767	\$3.57	\$3.65
BALTIMORE, MD/WASHINGTON D.C. - MULO	\$272,859,928	\$268,662,750	\$4,197,177	1.6	78,523,263	77,594,345	928,918	1.2	\$7,752	\$7,147	\$3.47	\$3.46
PHILADELPHIA, PA - MULO	\$199,199,730	\$197,441,183	\$1,758,547	0.9	59,720,608	58,647,311	1,073,297	1.8	\$7,552	\$7,131	\$3.34	\$3.37
BOSTON, MA - MULO	\$132,136,433	\$132,351,648	-\$215,215	-0.2	36,883,791	36,658,628	225,162	0.6	\$5,055	\$4,902	\$3.58	\$3.61
HARRISBURG/SCRANTON, PA - MULO	\$127,690,850	\$124,452,663	\$3,238,187	2.6	38,385,783	37,558,855	826,929	2.2	\$7,541	\$7,166	\$3.33	\$3.31
NEW ENGLAND - MULO	\$123,687,857	\$122,255,502	\$1,432,355	1.2	34,120,425	33,506,075	614,350	1.8	\$5,732	\$5,724	\$3.63	\$3.65
HARTFORD, CT/SPRINGFIELD, MA - MULO	\$112,214,722	\$111,385,287	\$829,435	0.7	31,681,494	31,093,972	587,522	1.9	\$6,856	\$6,790	\$3.54	\$3.58
BUFFALO/ROCHESTER, NY - MULO	\$90,523,327	\$85,772,304	\$4,751,023	5.5	28,724,211	27,424,530	1,299,681	4.7	\$6,287	\$6,081	\$3.15	\$3.13
PITTSBURGH, PA - MULO	\$71,772,665	\$72,703,716	-\$931,052	-1.3	23,348,886	23,247,138	101,748	0.4	\$6,292	\$6,377	\$3.07	\$3.13
ALBANY, NY - MULO	\$43,374,509	\$42,762,691	\$611,818	1.4	12,538,505	12,186,293	352,212	2.9	\$7,041	\$6,985	\$3.46	\$3.51
SYRACUSE, NY - MULO	\$39,255,154	\$37,792,948	\$1,462,206	3.9	12,375,034	11,848,285	526,749	4.4	\$6,670	\$6,307	\$3.17	\$3.19
PROVIDENCE, RI - MULO	\$27,688,072	\$27,603,969	\$84,103	0.3	7,994,001	7,891,444	102,557	1.3	\$6,058	\$6,050	\$3.46	\$3.50

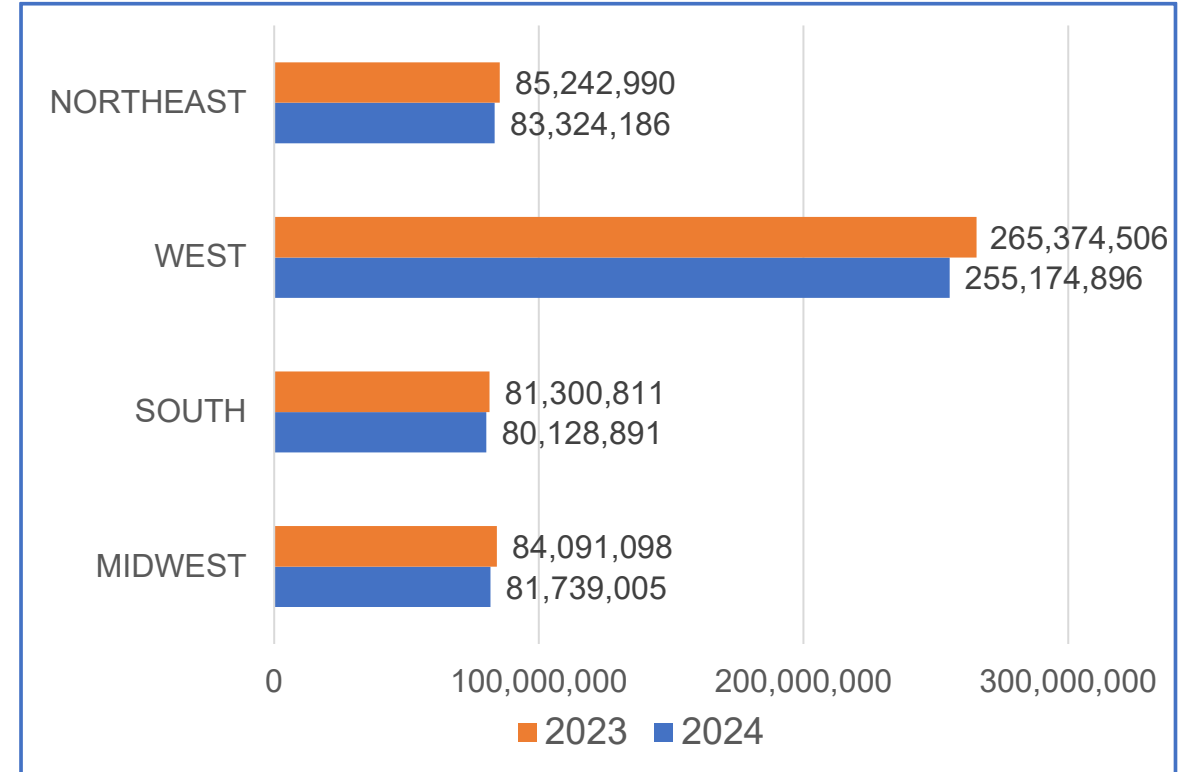
- New York is the largest market for Packaged Salads & Greens, posting negative \$ sales growth of -1.5%, and is showing a slight increase in unit growth of 0.5%.
- New England, the 6<sup>th</sup> largest market, responsible for \$123.6M in sales, is showing dollar growth of 1.2% and unit growth of 1.8%.
- Buffalo/Rochester is posting the highest growth of all markets, with dollar increases of 5.5% and unit increases of 4.7%

# Natural Channel: Packaged Salads & Greens Subcategory

Natural Channel Total US Dollars



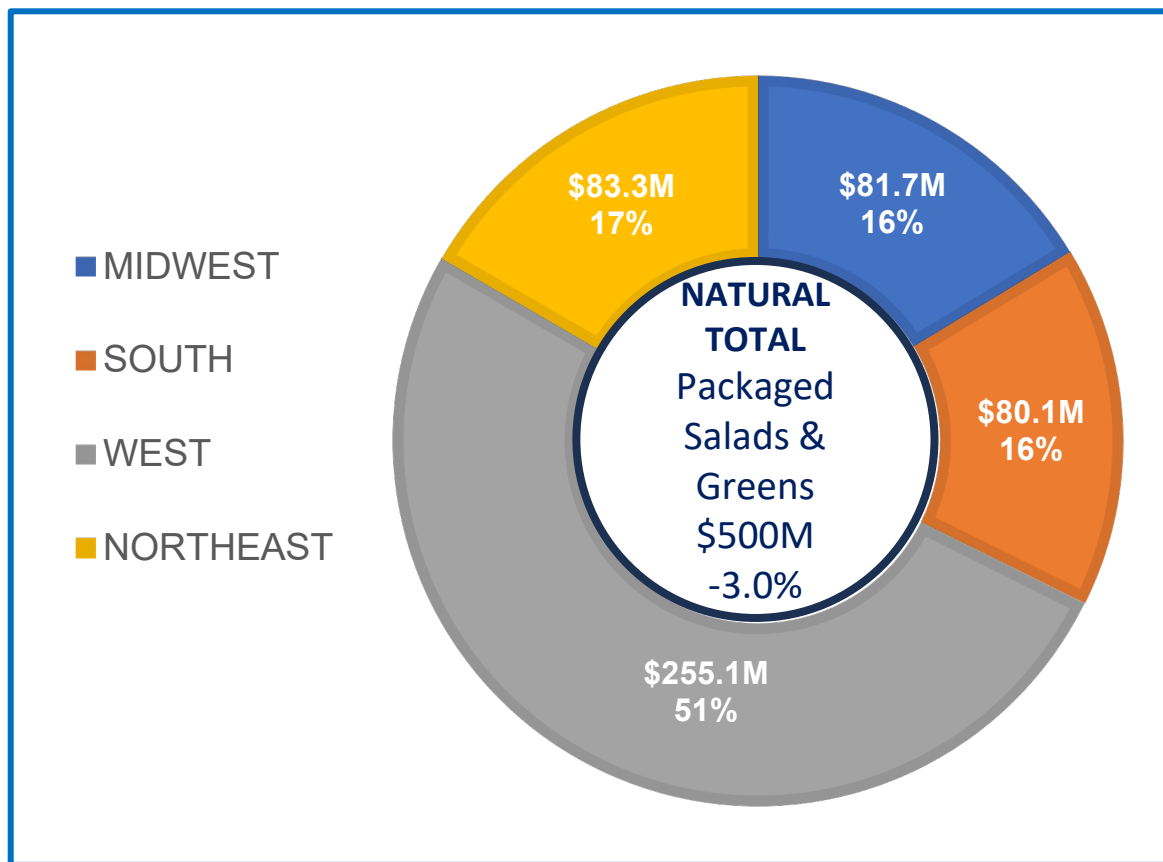
Dollar Change vs Year Ago



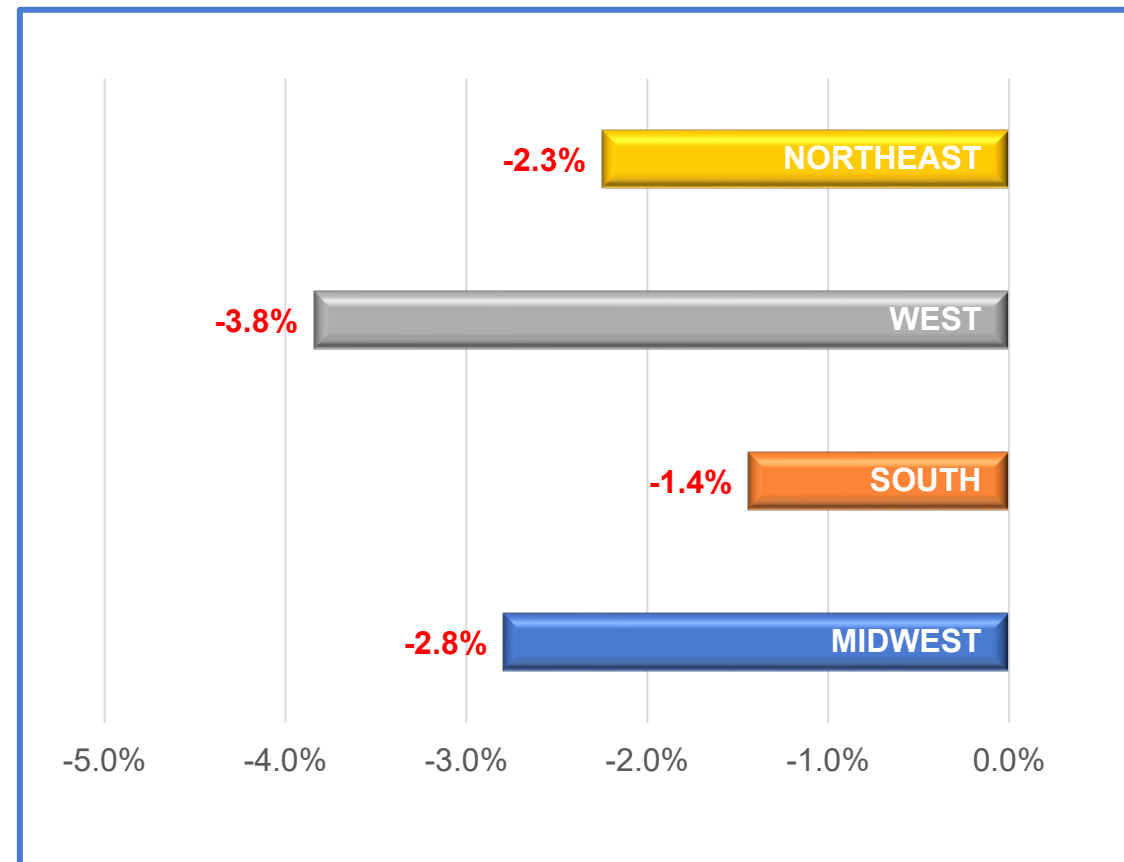
- Total Natural \$ volume for the Packaged Salads & Greens subcategory is \$500M and is in decline -3.0% over the prior year.
- The South region is the largest \$ volume region, followed by the Northeast, Midwest and South, respectively.
- All four census regions are posting sales that are less than the prior year.

# Natural Channel: Packaged Salads & Greens Subcategory - By Region

Natural Channel Dollars and % Category Share by Region



% Dollar Change vs Year Ago



- The West region is the most highly developed region for this subcategory, responsible for 51% of \$ volume, with the largest decline in dollar volume of -3.8%.
- The 3 remaining regions, South, Northeast, and Midwest, are responsible for the remaining 49% of \$ volume, with respective declines of -1.4%, -2.3%, and -2.8%.

# Natural Channel: Packaged Salads & Greens

## Top 10 Brands Northeast Census Region

Description	Dollars		Dollars +/-	Dollars %	Units		Units +/-	Units %	Avg %	TDP,		Average	ARP,	
	Dollars	Dollars, Yago	Chg, Yago	Chg, Yago	Units	Units, Yago	Chg, Yago	Chg, Yago	ACV	TDP	Yago	Items Selling	ARP	Yago
<b>PRODUCE PACKAGED SALADS &amp; GREENS</b>	<b>\$500,366,978</b>	<b>\$516,009,405</b>	<b>-\$15,642,427</b>	<b>-3.0</b>	<b>119,517,035</b>	<b>122,648,404</b>	<b>-3,131,368</b>	<b>-2.6</b>		<b>\$7,448</b>	<b>\$7,230</b>		<b>\$4.19</b>	<b>\$4.21</b>
ORGANIC GIRL	\$85,887,795	\$85,662,121	\$225,673	0.3	16,852,852	16,675,671	177,182	1.1	67	\$828	\$784	12	\$5.10	\$5.14
TAYLOR FARMS	\$68,479,220	\$65,039,627	\$3,439,593	5.3	17,432,031	16,268,125	1,163,905	7.2	63.2	\$1,374	\$1,229	20	\$3.93	\$4.00
PRIVATE LABEL ORGANIC	\$58,477,701	\$61,152,501	-\$2,674,800	-4.4	13,436,268	13,435,888	380	0.0	48	\$426	\$444	8.4	\$4.35	\$4.55
FRESH EXPRESS	\$51,668,235	\$55,315,000	-\$3,646,765	-6.6	13,037,491	13,728,097	-690,605	-5.0	43.1	\$1,053	\$1,037	23.6	\$3.96	\$4.03
EARTHBOUND FARM	\$39,463,011	\$50,533,722	-\$11,070,711	-21.9	8,785,424	10,950,871	-2,165,448	-19.8	67.8	\$604	\$661	7.7	\$4.49	\$4.61
PRIVATE LABEL	\$32,186,671	\$37,114,593	-\$4,927,922	-13.3	10,222,356	11,750,226	-1,527,870	-13.0	50.4	\$436	\$456	8.2	\$3.15	\$3.16
OLIVIAS ORGANICS	\$16,319,251	\$17,131,636	-\$812,385	-4.7	3,213,656	3,381,188	-167,532	-5.0	11.4	\$112	\$109	9	\$5.08	\$5.07
JOSIES ORGANICS	\$12,865,031	\$12,184,471	\$680,560	5.6	2,746,713	2,581,997	164,716	6.4	22.6	\$189	\$173	6.6	\$4.68	\$4.72
DOLE	\$9,747,155	\$10,620,317	-\$873,161	-8.2	2,731,924	2,979,704	-247,780	-8.3	13.3	\$198	\$205	10.3	\$3.57	\$3.56
GOTHAM GREENS	\$8,272,678	\$8,227,571	\$45,108	0.5	1,891,268	1,918,287	-27,019	-1.4	31	\$162	\$143	4.8	\$4.37	\$4.29

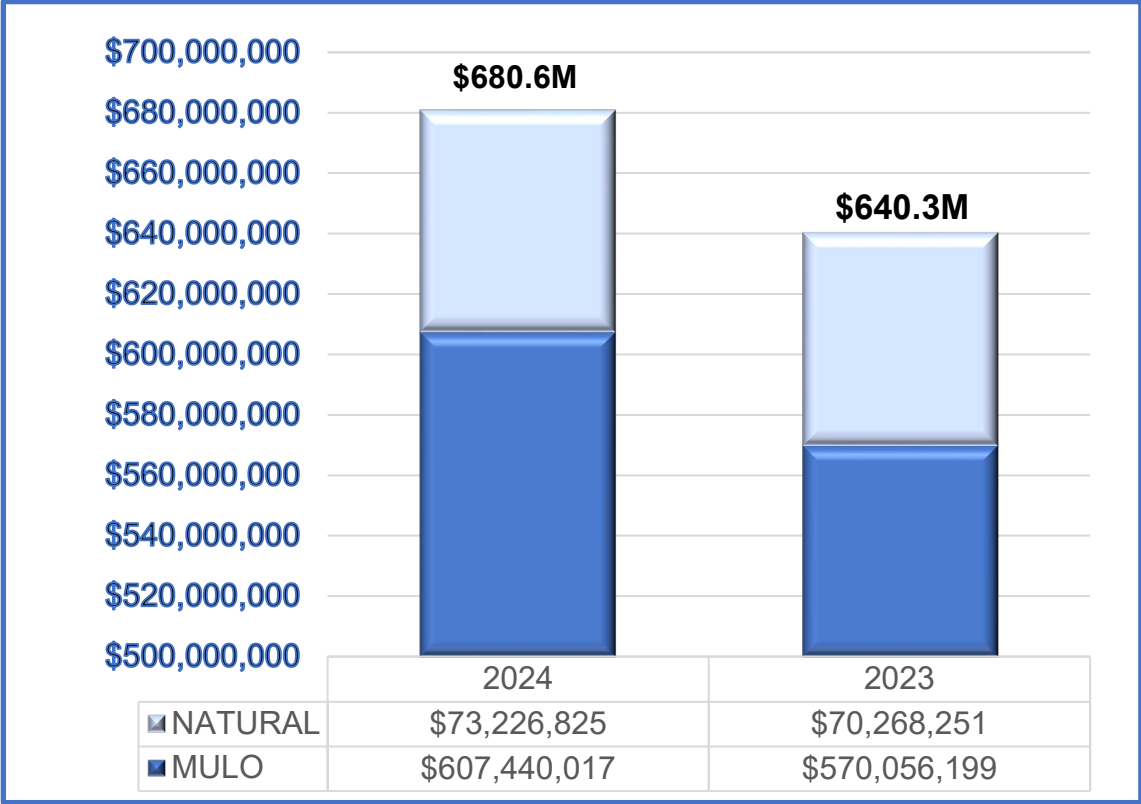
- The Natural Channel Frozen Potatoes subcategory is in decline in \$ volume, at -1.0% over the prior year in the Northeast, and is further in unit volume decline, at -6.9%.
- Weston, the #1 brand in the subcategory with \$5.1M in \$ volume, is also in decline, at -8% over the prior year, and is down -8.5% in unit volume.
- Ore Ida, the #2 brand, has the distinction of being the only Top 10 Northeast Brand that is growing in \$ volume over the prior year; unit volume, however, is in decline at -7.3%.
- McCain, the #3 brand Frozen Potato, is also in decline in \$ Volume, at -2% % over the prior year, and is also declining in unit volume at 4.7% over the prior year.

# Subcategory Performance Packaged Herbs

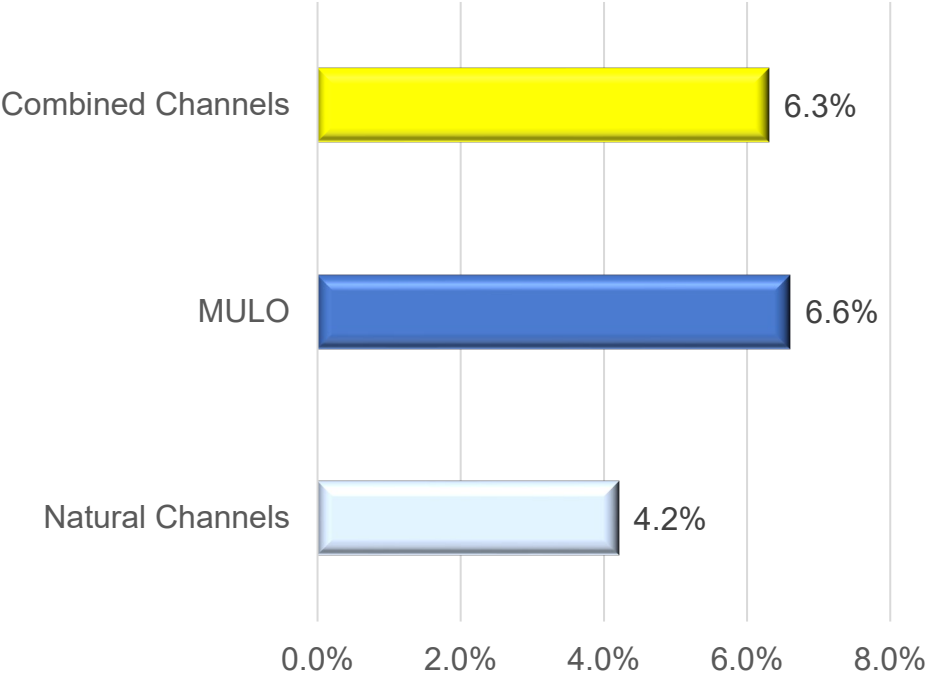
*SPINS Satori - 52 Weeks Ending 9-8-24*

# Total US Packaged Herbs Subcategory

Total US Dollars



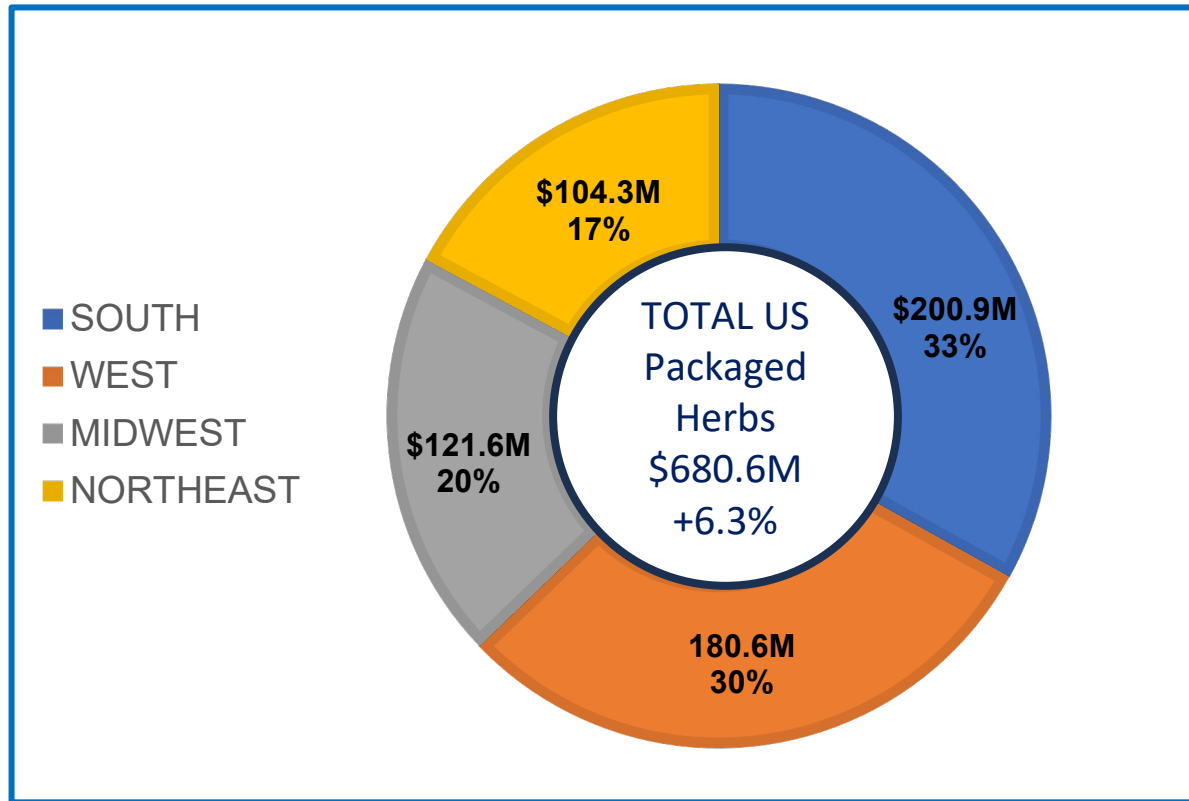
% Dollar Change vs Year Ago



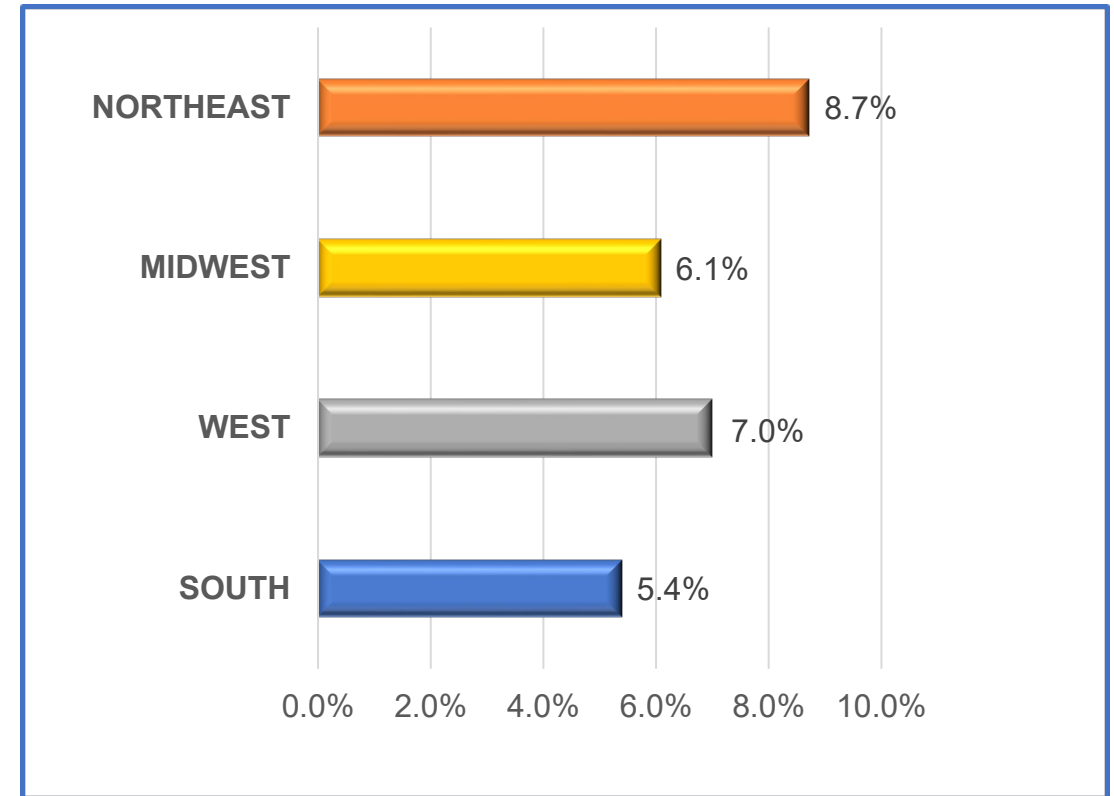
- The Total US Packaged Herb is a \$680.6M subcategory and is growing 6.3% compared to the prior year.
- Sales dollars were up in the Natural Channel (+4.2%), and MULO saw the greatest increase (6.6%).
- As in most subcategories, MULO represents most sales and, in this case, the largest year-over-year growth.

# Total US Packaged Herbs Subcategory - By Region

Total Dollars and % Category Share by Region



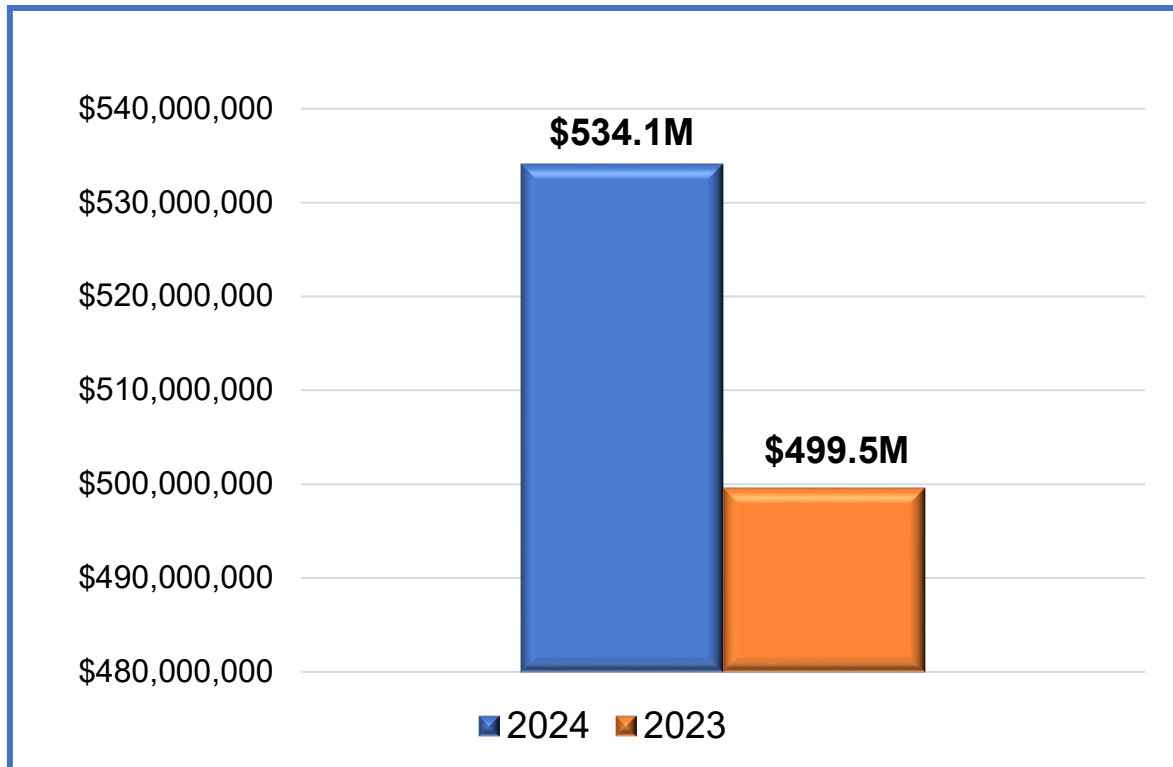
% Dollar Change vs Year Ago



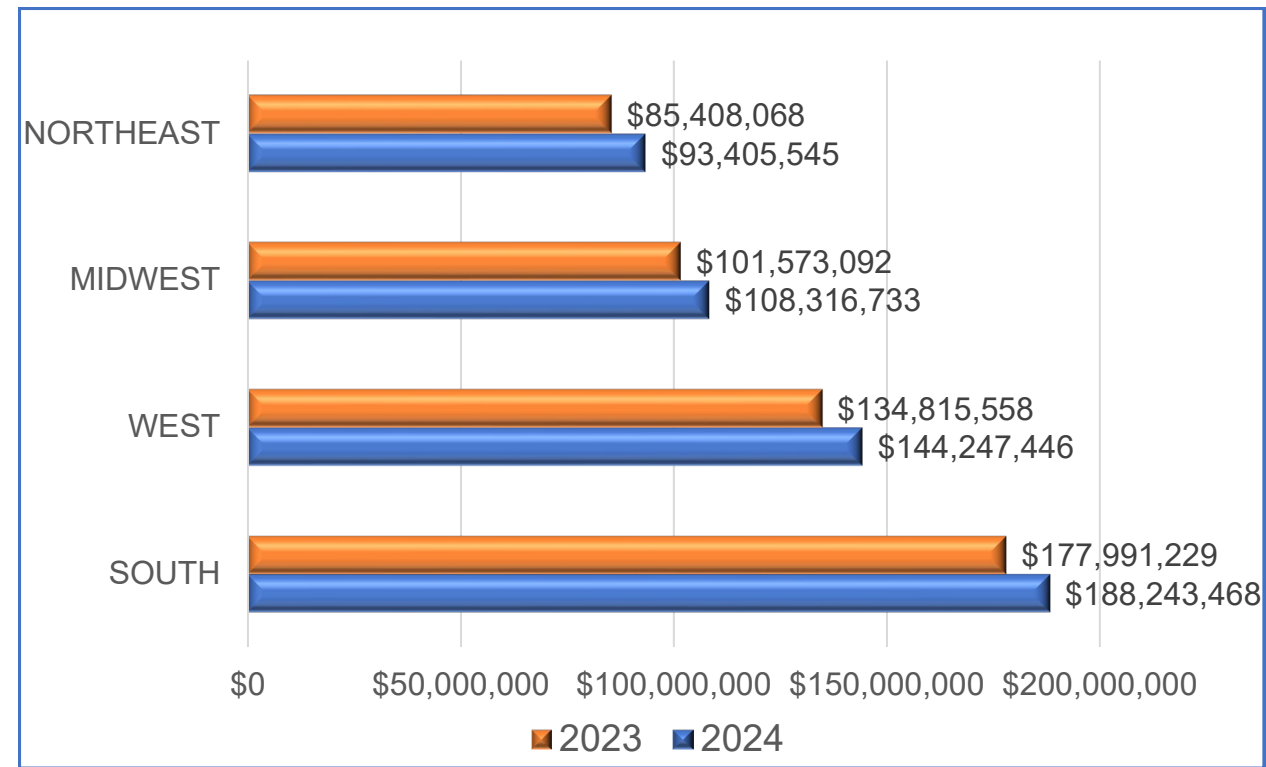
- The South region is the most highly developed region for this subcategory, responsible for 33% of \$ volume, with growth at 5.4%.
- The Northeast, the 4<sup>th</sup> ranked region in dollar volume, is growing the fastest in dollar volume, year over year at +8.7%.
- The 2 remaining regions, West and Midwest, are responsible for the remaining \$ volume, with respective growth of 7.0% and 6.1%.

# MULO: Packaged Herbs Subcategory

MULO Total US Dollars



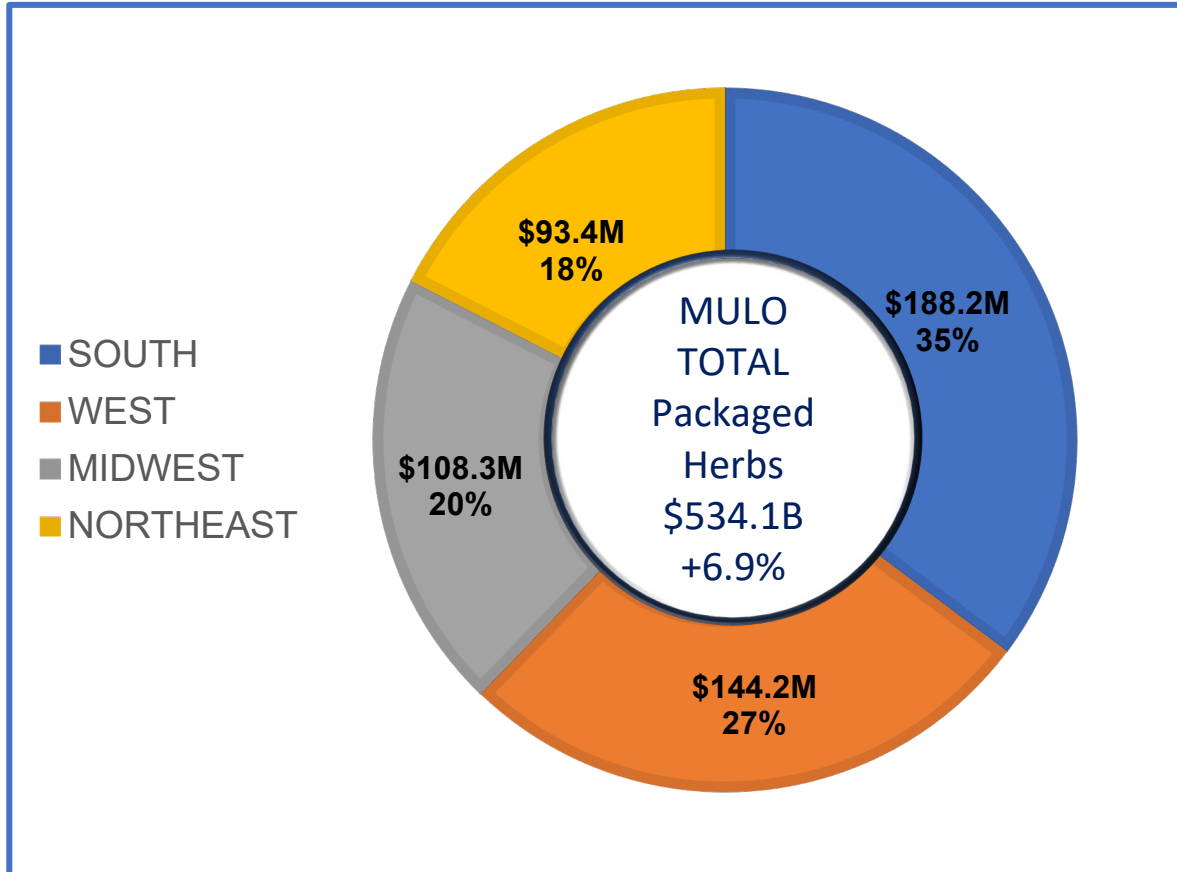
Dollar Change vs Year Ago



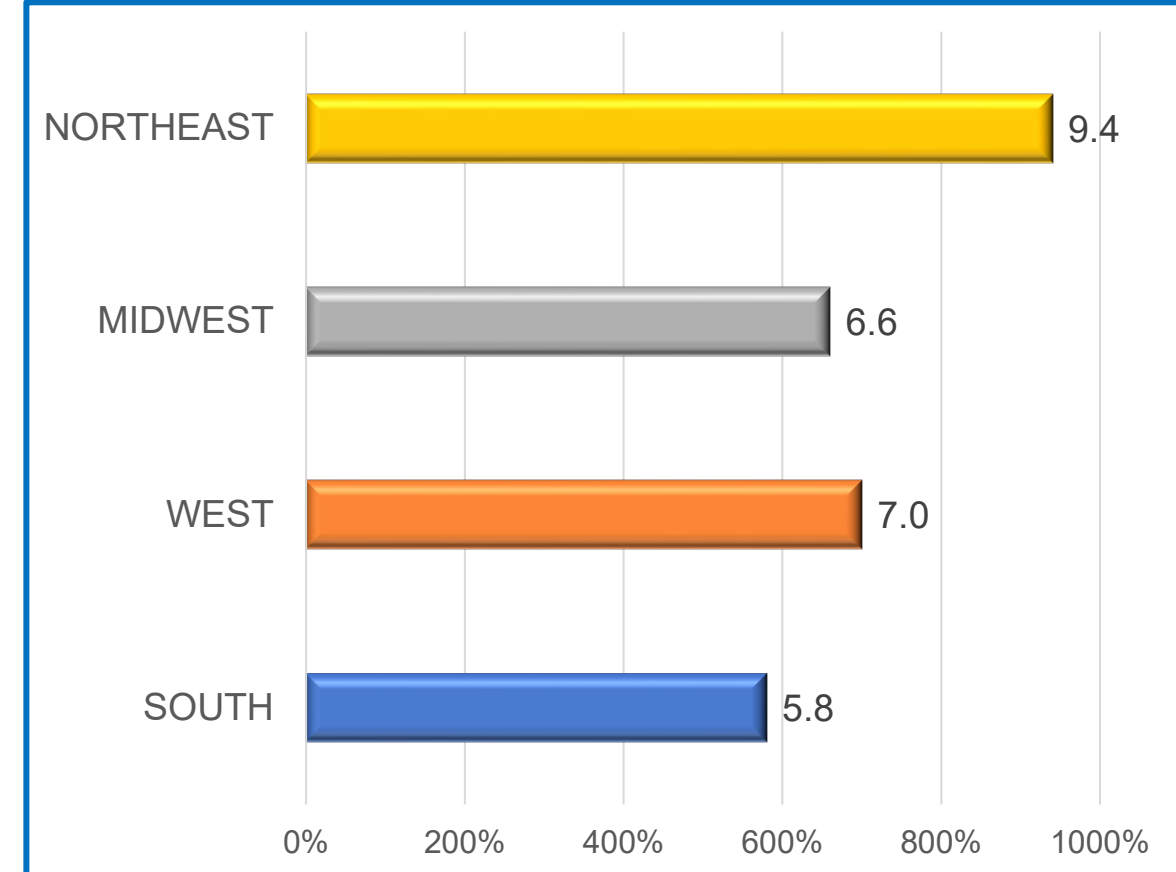
- Total US MULO \$ volume for the Packaged Herbs subcategory is \$534.1M and grew 6.3% over the prior year.
- The South region is the largest \$ volume region, followed by West, Midwest, and Northeast, respectively.
- All 4 census regions and Total US are posting positive dollar sales to the prior year.

# MULO: Packaged Herbs - By Region

MULO Dollars and % Category Share by Region



% Dollar Change vs Year Ago



- The South region is the most highly developed region for this subcategory, responsible for 35% of \$ volume, and shows growth in \$ volume at 5.8% compared to the prior year.
- The Northeast region is showing the largest % dollar growth to the prior year, with 9.4% growth, year over year, with an 18% subcategory share.
- The 2 remaining regions, West and Midwest, are responsible for the remaining 47% of \$ volume, with respective dollar sales growth of 7.0%, 6.6%.

# MULO: Packaged Herbs

## Top 10 Brands Northeast Census Region

Description			Dollars %				Units %				Average			
	Dollars	Dollars, Yago	Dollars +/- Chg, Yago	Chg, Yago	Units	Units, Yago	Units +/- Chg, Yago	Chg, Yago	Avg % ACV	TDP	TDP, Yago	Items Selling	ARP, Yago	
<b>PRODUCE PACKAGED HERBS</b>	<b>\$93,405,545</b>	<b>\$85,408,068</b>	<b>\$7,997,476</b>	<b>9.4</b>	<b>35,635,749</b>	<b>32,365,834</b>	<b>3,269,915</b>	<b>10.1</b>		<b>\$ 1,564</b>	<b>\$ 1,634</b>		<b>\$2.62</b>	<b>\$2.64</b>
PRIVATE LABEL	\$31,963,557	\$26,714,787	\$5,248,770	19.6	11,984,610	10,227,629	1,756,981	17.2	48	\$ 411	\$ 397	7.4	\$2.67	\$2.61
GOURMET GARDEN	\$15,305,337	\$16,021,068	-\$715,731	-4.5	3,157,317	3,287,961	-130,644	-4.0	59.5	\$ 451	\$ 505	7.4	\$4.85	\$4.87
PRIVATE LABEL ORGANIC	\$11,918,659	\$11,549,019	\$369,640	3.2	5,289,224	5,247,304	41,921	0.8	20.2	\$ 185	\$ 160	7.2	\$2.25	\$2.20
GOODNESS GARDENS	\$9,829,808	\$8,759,982	\$1,069,826	12.2	4,785,803	4,538,522	247,281	5.4	25.7	\$ 171	\$ 171	5.3	\$2.05	\$1.93
INFINITE HERBS	\$5,216,008	\$5,357,380	-\$141,372	-2.6	1,896,337	1,996,148	-99,812	-5.0	11.1	\$ 74	\$ 82	6.2	\$2.75	\$2.68
EDIBLE GARDEN	\$4,718,514	\$1,487,373	\$3,231,141	217.2	2,615,403	760,792	1,854,611	243.8	19.8	\$ 90	\$ 69	3.3	\$1.80	\$1.96
SOLI ORGANIC	\$4,053,689	\$463,213	\$3,590,475	775.1	1,752,631	183,029	1,569,603	857.6	12.1	\$ 101	\$ 118	6.7	\$2.31	\$2.53
NOBRAND	\$1,688,726	\$1,252,851	\$435,875	34.8	632,287	471,070	161,217	34.2	16.6	\$ 28	\$ 31	1.1	\$2.67	\$2.66
GOTHAM GREENS	\$1,645,060	\$1,261,811	\$383,248	30.4	375,983	292,662	83,321	28.5	5.9	\$ 7	\$ 6	1	\$4.38	\$4.31
WILD HARVEST	\$1,189,293	\$1,303,239	-\$113,946	-8.7	509,509	498,224	11,285	2.3	1.3	\$ 13	\$ 20	9.4	\$2.33	\$2.62

- Packaged Herbs is the smallest subcategory, with \$ volume at 93.4M, in the Northeast.
- Private Label leads the subcategory sales with \$31.9M and is growing rapidly in both dollars and units; 19.6% and 17.2%, respectively.
- Gourmet Gardens is the #1 brand, with \$15.3M of subcategory sales in the Northeast, and is showing declines in both dollars and units; -4.5% and -4.0%, respectively.
- Soli Organic, with a base of \$4.0M in sales, is the fastest growing brand in both dollars and units; +775.1% and 857.6%, respectively.

# MULO: Packaged Herbs

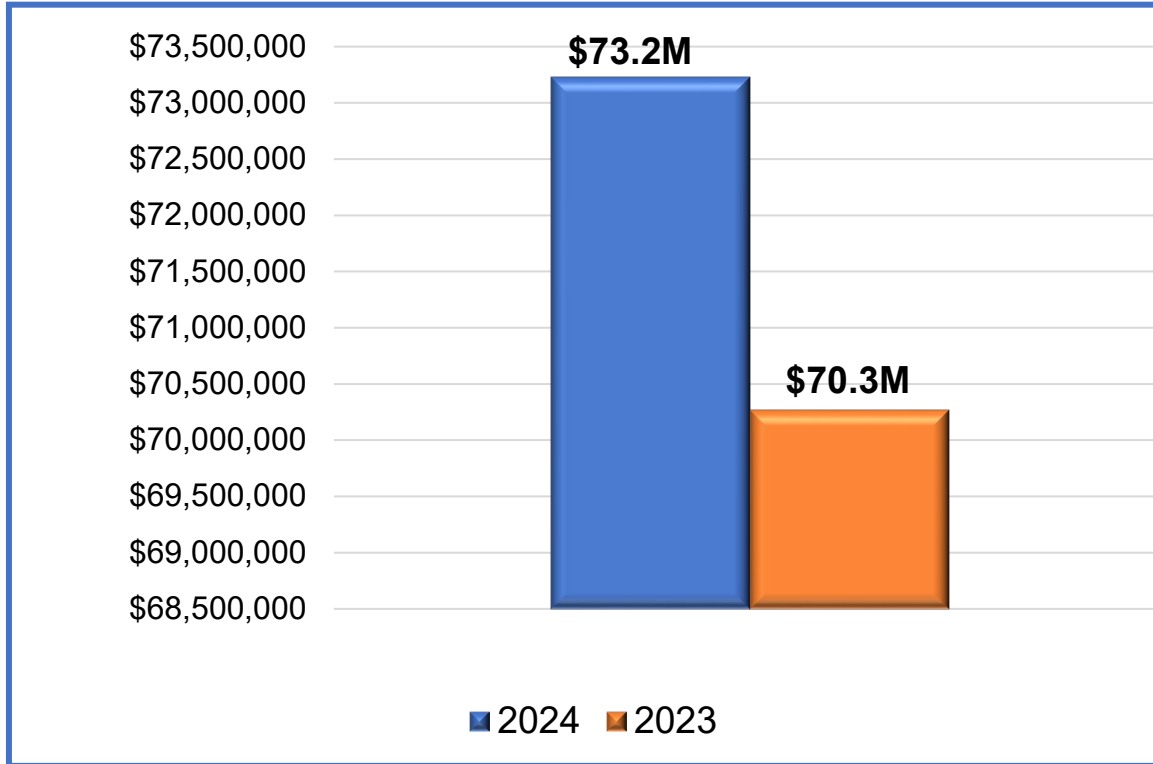
## Top Markets Northeast Census Region

Geography	Dollars %				Units +/- Units %				TDP	TDP, Yago	ARP	ARP, Yago
	Dollars	Dollars, Yago	Dollars +/- Chg, Yago	Chg, Yago	Units	Units, Yago	Units +/- Chg, Yago	Chg, Yago				
NEW YORK, NY - MULO	\$27,970,072	\$24,982,599	\$2,987,473	12.0	10,718,075	9,594,544	1,123,531	11.7	\$1,643	\$1,662	\$2.61	\$2.60
BALTIMORE, MD/WASHINGTON D.C. - MULO	\$17,585,509	\$16,612,261	\$973,248	5.9	8,062,824	7,075,650	987,174	14.0	\$1,648	\$1,761	\$2.18	\$2.35
BOSTON, MA - MULO	\$11,047,475	\$10,075,498	\$971,977	9.6	3,865,529	3,486,014	379,515	10.9	\$1,340	\$1,351	\$2.86	\$2.89
PHILADELPHIA, PA - MULO	\$10,162,869	\$9,639,876	\$522,993	5.4	4,337,897	4,070,436	267,461	6.6	\$1,769	\$1,836	\$2.34	\$2.37
NEW ENGLAND - MULO	\$9,349,180	\$8,834,704	\$514,476	5.8	3,262,710	3,027,506	235,204	7.8	\$1,773	\$1,819	\$2.87	\$2.92
HARTFORD, CT/SPRINGFIELD, MA - MULO	\$6,663,599	\$5,683,129	\$980,471	17.3	2,460,850	2,108,371	352,479	16.7	\$1,551	\$1,605	\$2.71	\$2.70
HARRISBURG/SCRANTON, PA - MULO	\$5,027,160	\$4,986,191	\$40,969	0.8	2,251,815	2,172,587	79,228	3.6	\$1,500	\$1,854	\$2.23	\$2.30
PITTSBURGH, PA - MULO	\$4,268,058	\$4,417,473	-\$149,416	-3.4	1,322,957	1,362,125	-39,169	-2.9	\$1,457	\$1,830	\$3.23	\$3.24
BUFFALO/ROCHESTER, NY - MULO	\$3,994,873	\$3,354,342	\$640,531	19.1	1,683,445	1,451,710	231,735	16.0	\$1,517	\$1,642	\$2.37	\$2.31
ALBANY, NY - MULO	\$2,969,271	\$2,723,281	\$245,989	9.0	1,025,902	940,685	85,217	9.1	\$2,086	\$1,970	\$2.89	\$2.89
PROVIDENCE, RI - MULO	\$2,186,348	\$1,904,625	\$281,723	14.8	773,618	665,338	108,280	16.3	\$1,416	\$1,499	\$2.83	\$2.86
SYRACUSE, NY - MULO	\$2,080,924	\$1,740,169	\$340,754	19.6	836,649	695,876	140,773	20.2	\$1,637	\$1,605	\$2.49	\$2.50

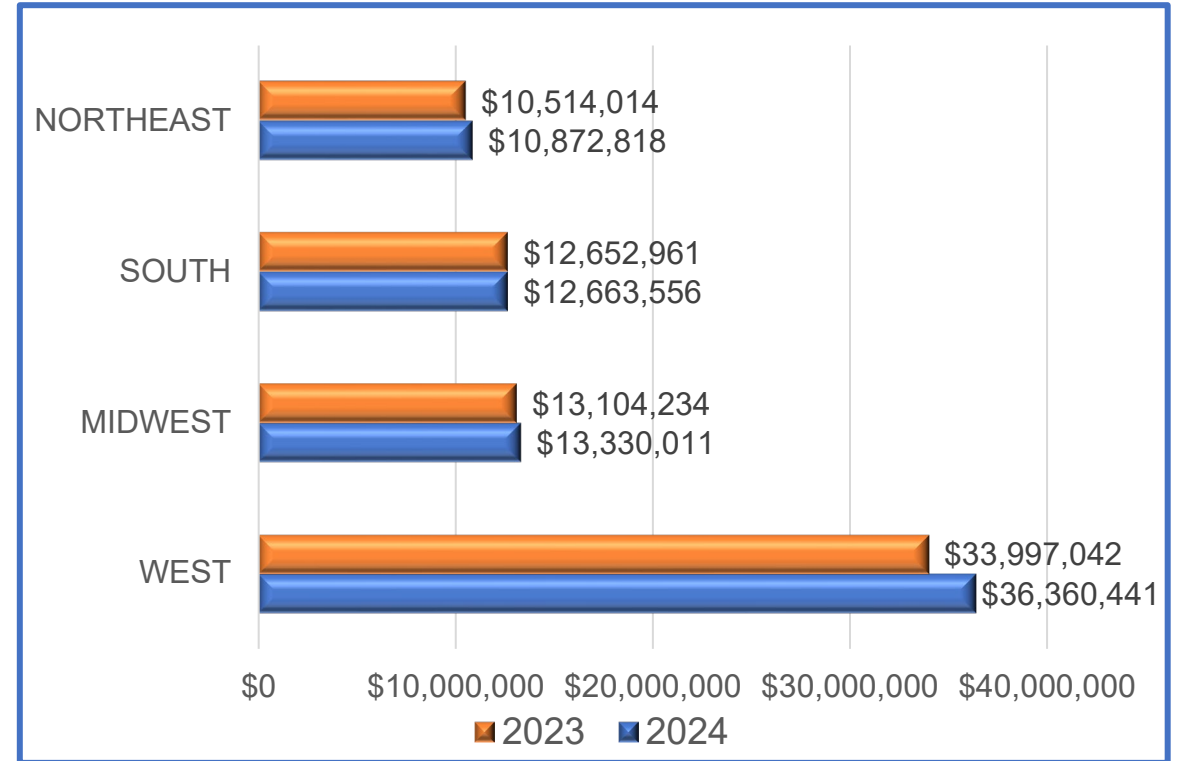
- New York, the largest market for Packaged Herbs and responsible for \$27.9M in sales, is experiencing growth in dollar volume at 12.0% and unit volume at 11.7%.
- New England, the 5<sup>th</sup> largest market and responsible for \$9.3M in sales, is showing dollar growth of 5.8% and unit growth of 7.8%.
- All markets are growing in Dollar volume, except for Pittsburgh, which is in decline, -3.4%.

# Natural Channel: Packaged Herbs Subcategory

Natural Channel Total US Dollars



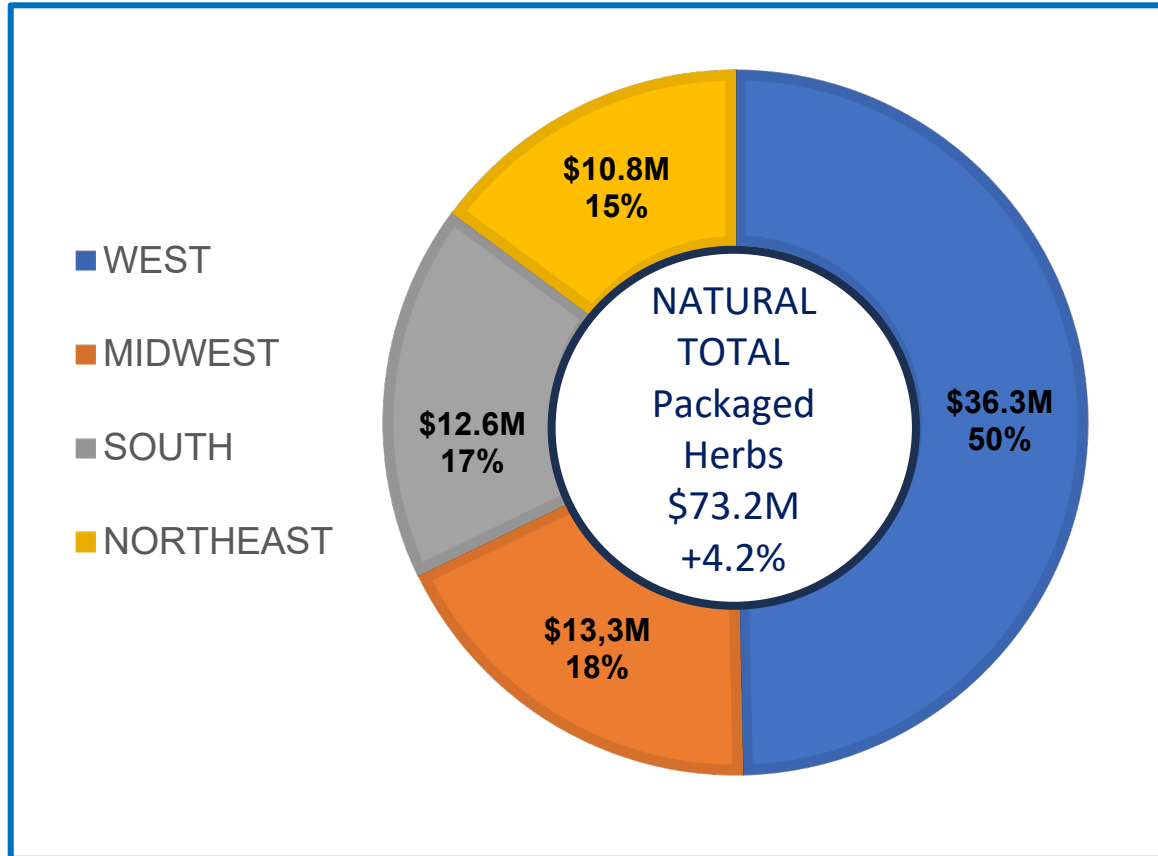
Dollar Change vs Year Ago



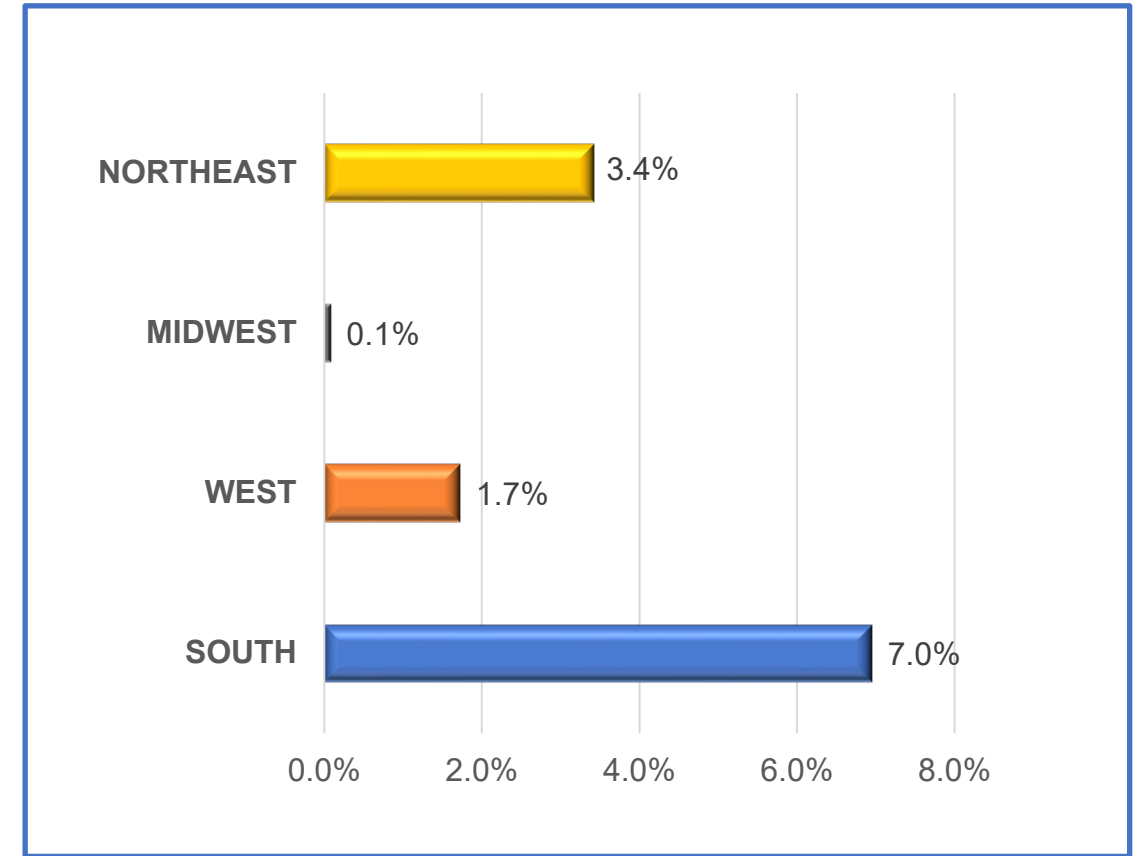
- Total Natural \$ volume for the Packaged Herb subcategory is \$73.2M and grew 4.2% over the prior year.
- The West region is the largest \$ Volume region, followed by the Midwest, South and Northeast, respectively.
- All regions are showing greater dollar sales volume than the prior year.

# Natural Channel: Packaged Herbs - By Region

Natural Channel Dollars and % Category Share by Region



% Dollar Change vs Year Ago



- The West region is the most highly developed region for this subcategory, responsible for 50% of \$ volume, and is showing dollar volume growth of 1.7% to prior year.
- The 3 remaining regions, South, Midwest and Northeast, are responsible for the remaining 50% of \$ volume, with growth of 7.0%, 0.1% and 3.4%, respectively.

## Natural Channel: Packaged Herbs Top 10 Brands Northeast Census Region

Description	Dollars %				Units %					Average				
	Dollars	Dollars, Yago	Dollars +/- Chg, Yago	Chg, Yago	Units	Units, Yago	Units +/- Chg, Yago	Chg, Yago	Avg % ACV	TDP	TDP, Yago	Items Selling	ARP	ARP, Yago
<b>PRODUCE PACKAGED HERBS</b>	<b>\$10,872,818</b>	<b>\$10,514,014</b>	<b>\$358,804</b>	<b>3.4</b>	<b>3,275,045</b>	<b>3,144,338</b>	<b>130,707</b>	<b>4.2</b>		<b>\$ 2,039</b>	<b>\$ 1,965</b>		<b>\$3.32</b>	<b>\$3.34</b>
GOODNESS GARDENS	\$3,402,338	\$3,624,088	-\$221,749	-6.1	1,118,675	1,164,080	-45,405	-3.9	59.6	\$ 650	\$ 612	9.2	\$3.04	\$3.11
SOLI ORGANIC	\$857,367	\$396,851	\$460,516	116.0	261,499	117,516	143,983	122.5	25.3	\$ 172	\$ 95	4.9	\$3.28	\$3.38
GOTHAM GREENS	\$804,726	\$591,230	\$213,496	36.1	164,660	127,049	37,611	29.6	17.9	\$ 22	\$ 18	1	\$4.89	\$4.65
PRIVATE LABEL ORGANIC	\$586,147	\$180,417	\$405,730	224.9	179,309	63,925	115,384	180.5	26.9	\$ 295	\$ 67	7.9	\$3.27	\$2.82
GOURMET GARDEN	\$539,036	\$565,683	-\$26,647	-4.7	87,952	92,908	-4,956	-5.3	44.4	\$ 291	\$ 286	6.3	\$6.13	\$6.09
USDA PRODUCE	\$459,885	\$128,742	\$331,143	257.2	152,869	41,179	111,690	271.2	12.7	\$ 53	\$ 47	3.4	\$3.01	\$3.13
PRIVATE LABEL	\$458,034	\$231,520	\$226,514	97.8	174,151	102,253	71,898	70.3	24.9	\$ 150	\$ 67	4.1	\$2.63	\$2.26
INFINITE HERBS	\$347,499	\$336,493	\$11,006	3.3	107,331	112,744	-5,414	-4.8	9	\$ 69	\$ 105	3.7	\$3.24	\$2.98
JACOBS FARM	\$341,199	\$540,614	-\$199,415	-36.9	100,089	159,232	-59,144	-37.1	7	\$ 89	\$ 81	5.3	\$3.41	\$3.40
UNCLE JOHNS	\$267,221	\$50,212	\$217,008	432.2	87,710	16,208	71,503	441.2	13.2	\$ 67	\$ 49	4.1	\$3.05	\$3.10

- Packaged Herbs is the smallest subcategory, with \$ volume at \$10.8M, in the Northeast.
- Goodness Gardens is the #1 brand, with \$3.4M or 31% of subcategory sales in the Northeast, and is showing growth in both units and dollars.
- Private Label Organic is the 5<sup>th</sup> largest segment, with high sales growth in both units and dollars.
- USDA Produce is experiencing the fastest growth in both Dollars and units: +257% and 271%, respectively.
- Soli Organic, the # 3 brand in the Northeast, more than doubled its volume on a year-over-year basis

# Fresh Produce Category & Subcategory Report

Brought to you by



Prepared by

