Food Accelerators
GROWING MAINE'S FOOD ECONOMY

Frozen Fruits & Vegetables Subcategory Report

August 2024

MAINE CENTER FOR ENTREPRENEURS

Project Overview

Report Purpose

This report was created to assist businesses selling in the Frozen Vegetable & Fruit category better understand the markets for their products and target new markets in the United States. Data presented in this report is intended to provide greater detail on consumer purchasing trends for products in this category.

Included in this report:

This report provides market dynamics for each product subcategory within the Frozen Vegetable & Fruit category, delivering detailed insights into sales performance across diverse channels and US Census territories. Within this expanding category, the report covers four primary subcategories: Edamame & Soy, Vegetables, Fruits, Potatoes.

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 August 11, 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.

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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 distributers 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

Frozen Vegetables & Fruits is valued at $9.8 billion in retail sales in the United States

The overall product category grew 2.6% annually in 2024 and grew in all US Census regions. The South led in sales volume at $3.98 billion and demonstrated a solid growth rate of 3.0%.

Frozen subcategories, Potatoes and Edamame & Soy have shown nice increases in $ sales volume to prior year, while Vegetables and Fruits are showing minor declines in dollar volume to prior year.

Of the 4 subcategories reviewed, Potatoes, the second largest category, experienced the most significant sales increases, accounting for $3.85B and a very high growth of 10.3% over the prior year. Edamame & Soy, the smallest category responsible for $75.6M in sales, grew at 3.2%, experiencing its highest sales growth within the Natural Channel.

In the same realm of comparison, Vegetables, the largest subcategory, with $3.95B in sales, experienced a minor decline of -2.0%. Similarly, the third largest subcategory, Fruits, responsible for $1.88B in sales, also experienced a slight decline of -1.1% 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 **August 11, 2024**

Frozen Vegetables & Fruit Category
- **Sub-Categories:** *(Edamame & Soy, Vegetables, Fruit, Potatoes)*

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), 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®

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

Additional Terms & Definitions

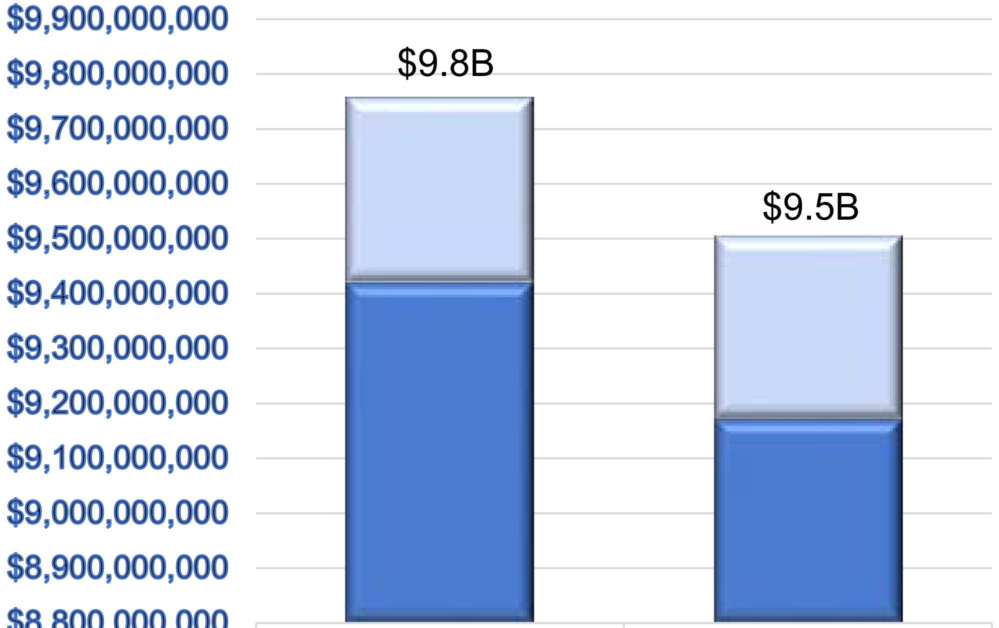
Term	Definition
Dollars	Total dollar sales of a product or group of products in the time frame indicated.
Dollars, Yago	Dollars sold over the same time period a year ago.
Dollars +/- Chg, Yago	The positive or negative dollar change for products sold in year reported, versus previous year.
Dollars % Chg, 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.

Frozen Vegetables & Fruit **Category Performance**

SPINS Satori - 52 Weeks Ending August 11, 2024

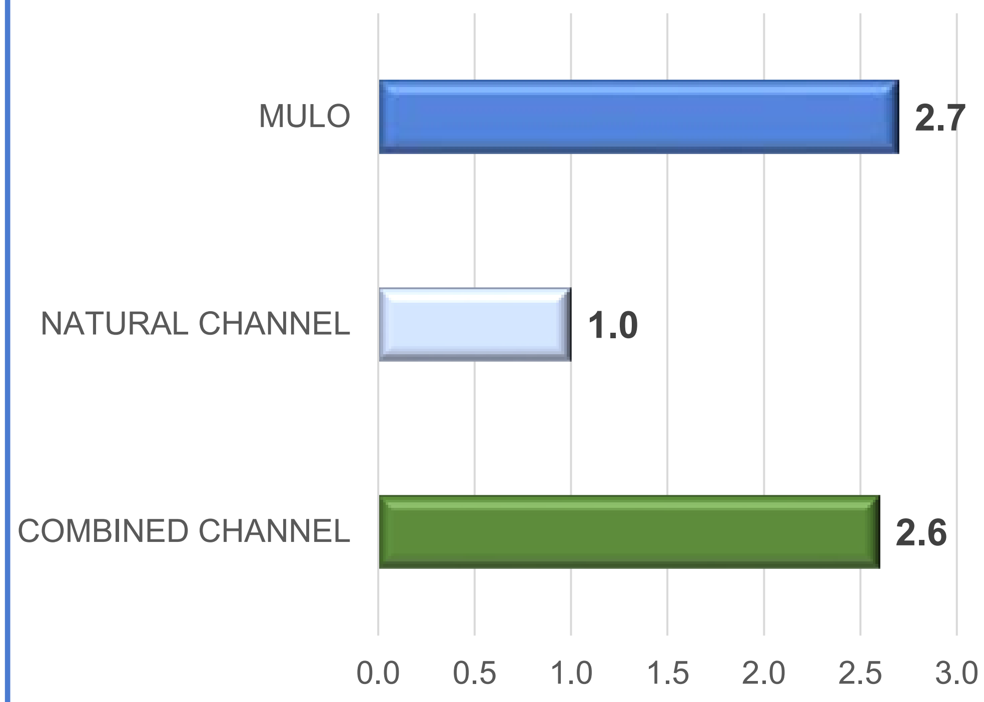
Total US Frozen Vegetables & Fruit

Total US Dollars



	2024	2023
NATURAL	$337,634,681	$334,198,266
MULO	$9,420,559,859	$9,172,183,892

% Dollar Change vs Year Ago

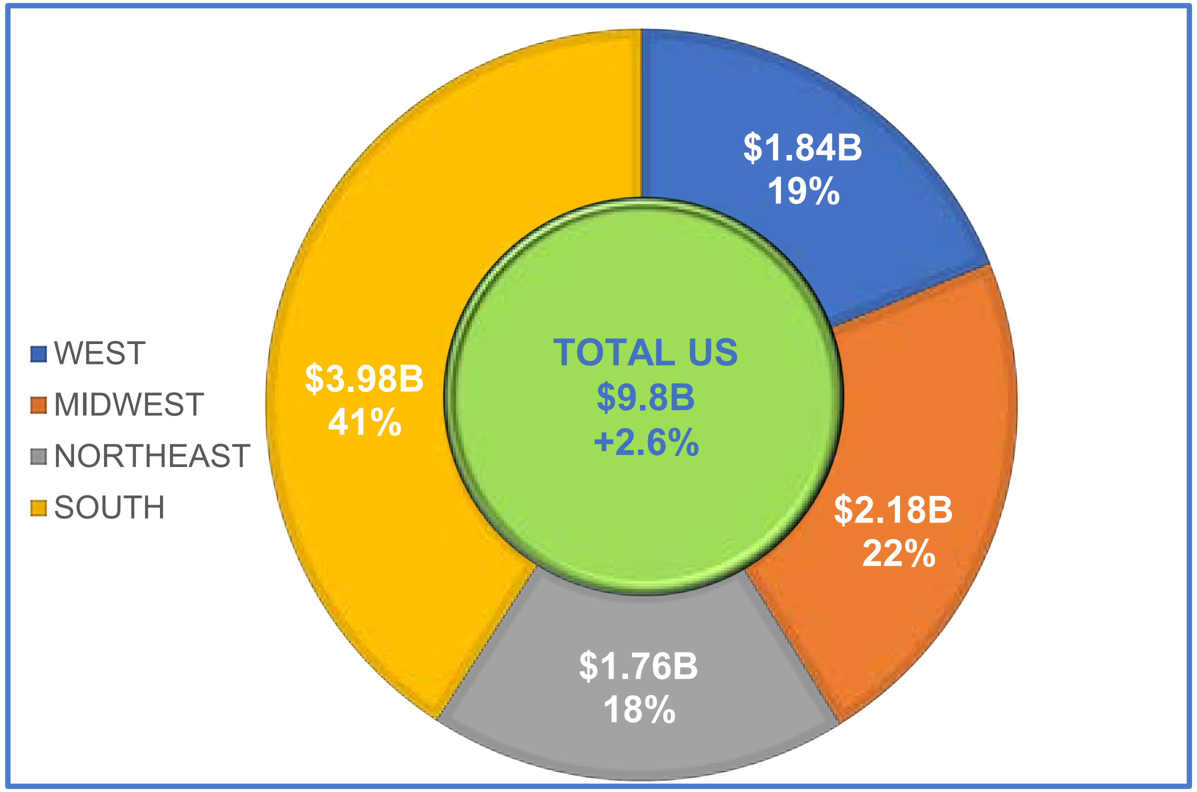


- The Total US Frozen Vegetables & Fruit combined channel is a $9.8B category and is performing better than prior year by 2.6%.
- Sales dollars were up in both the Natural Channel (+1.0%) and MULO (+2.7%).
- As in most categories, MULO represents most category sales.

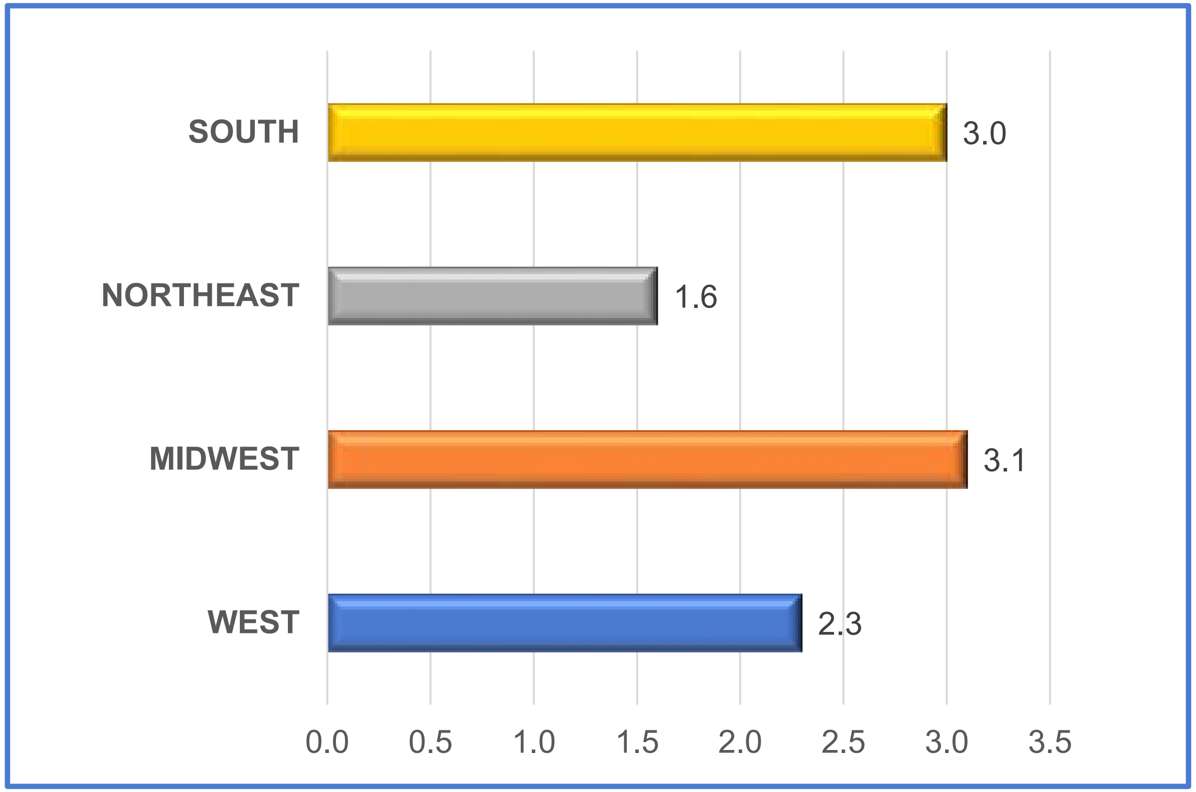
SPINS Satori – 52 weeks ending 8-11-24

Total US Frozen Vegetables & Fruit Category - By Region

Total Dollars and % Category Share by Region



% Dollars Change vs Year Ago

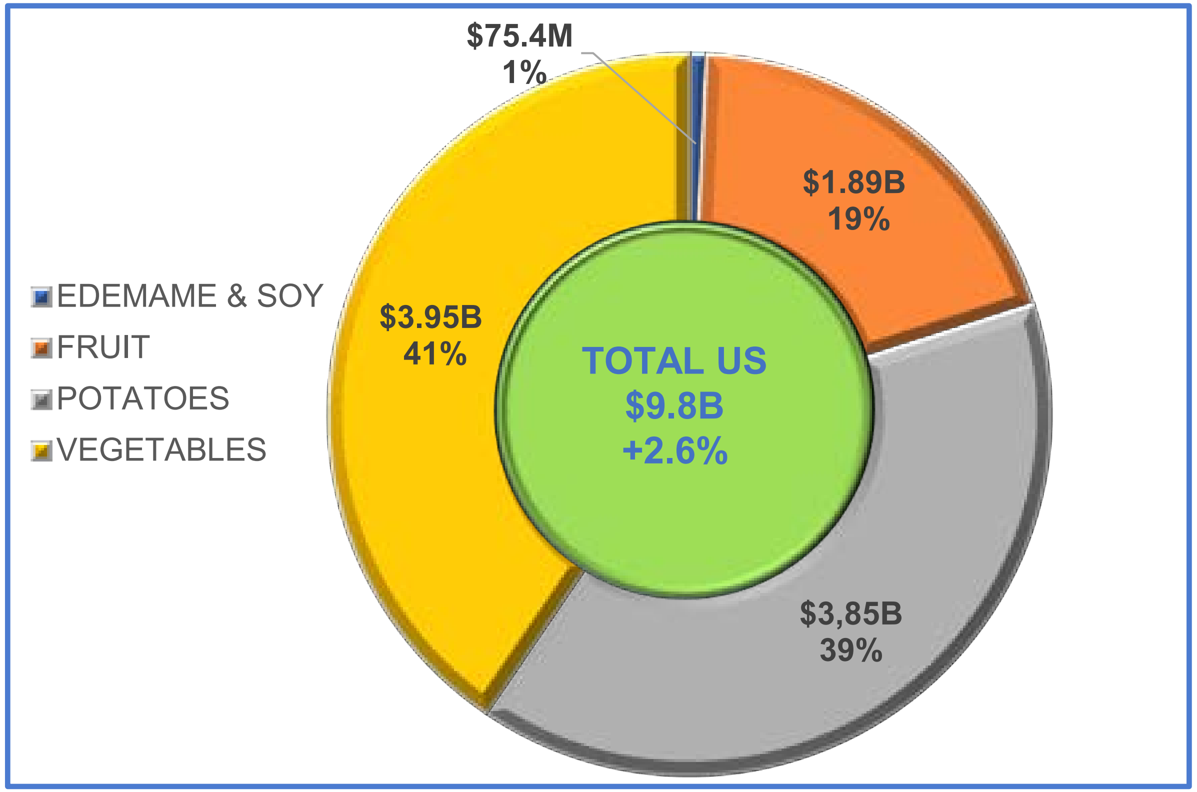


- The South represents 41% ($3.98B) of total category sales dollars, followed by the Midwest (22%), the West (19%) and the Northeast (18%).
- All 4 regions experienced growth over the prior year.

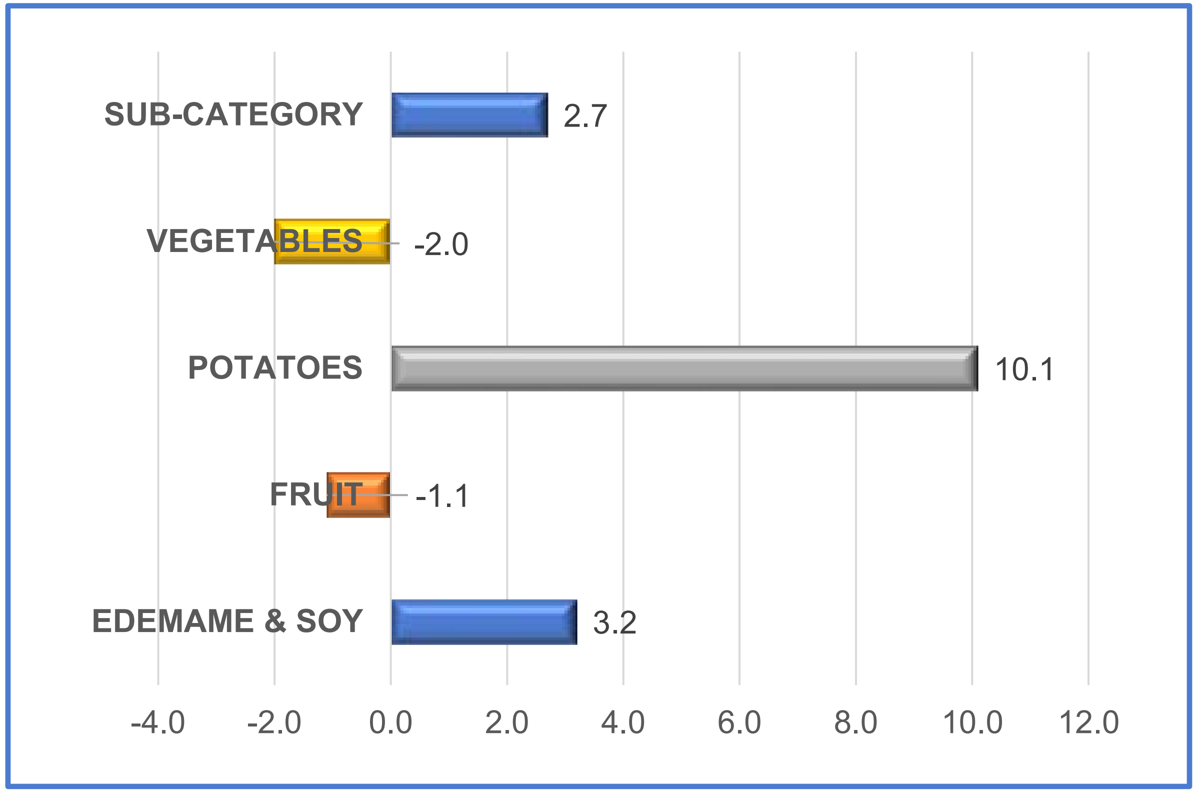
SPINS Satori – 52 weeks ending 8-11-24

Total US Frozen Vegetables & Fruit US - By Subcategory

Total Subcategory $ and % Category Share



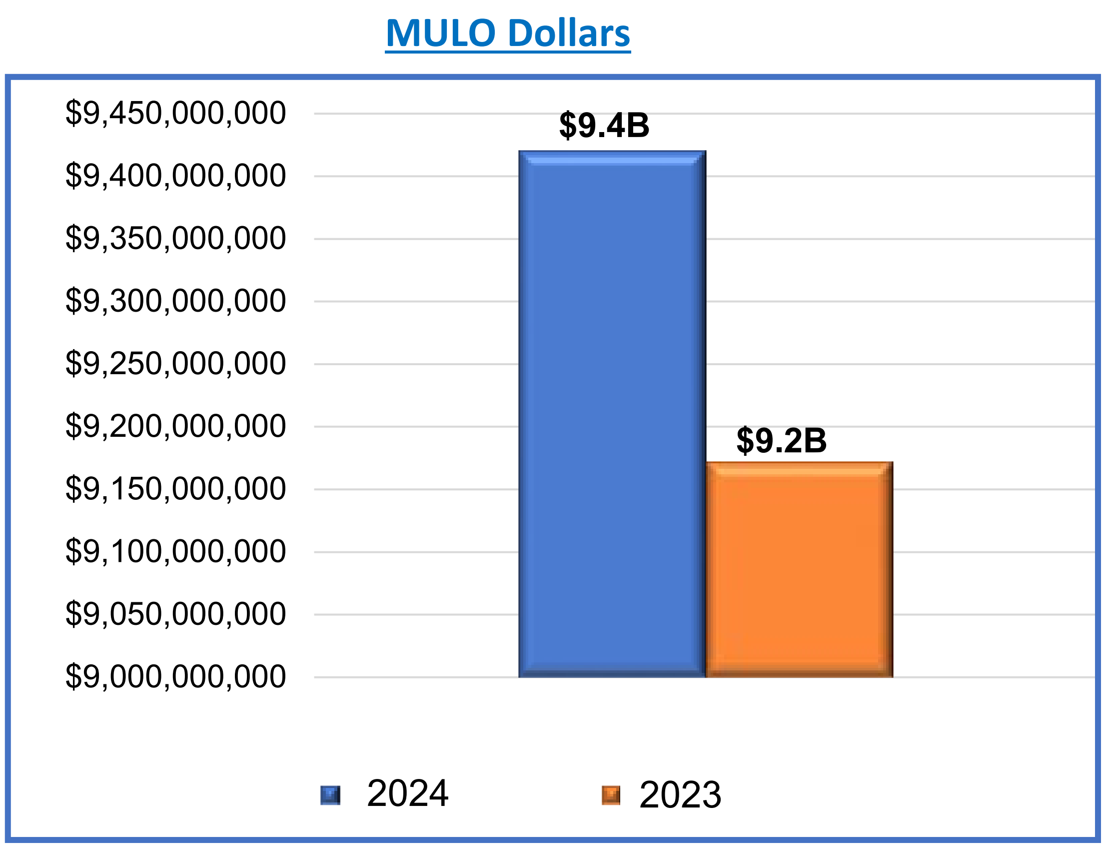
% Dollar Change vs Year Ago

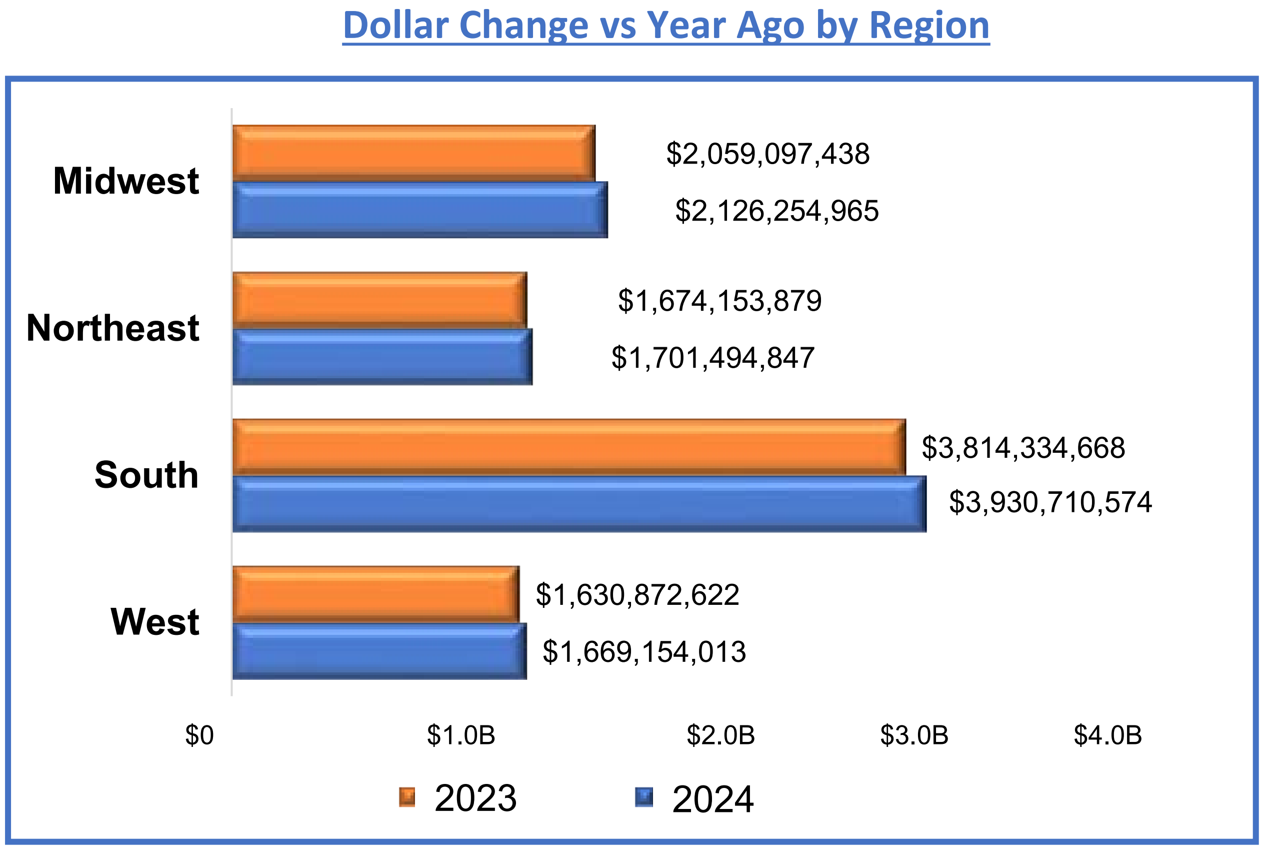


- Frozen Vegetables & Fruit is made up of 4 Subcategories: *Edamame & Soy, Vegetables, Fruit and Potatoes.*
- Frozen Vegetables is the largest of the four Subcategories with 41% of category sales ($3.95B) but is showing the largest subcategory dollar decline at -2.0%.
- Frozen Potatoes is the 2nd largest of the 4 subcategories, representing $3.85B and 39% of total category sales. Frozen Potatoes dollars experienced highest segment growth, +10.1%% over prior year.

SPINS Satori – 52 weeks ending 8-11-24

MULO: Frozen Vegetables & Fruits

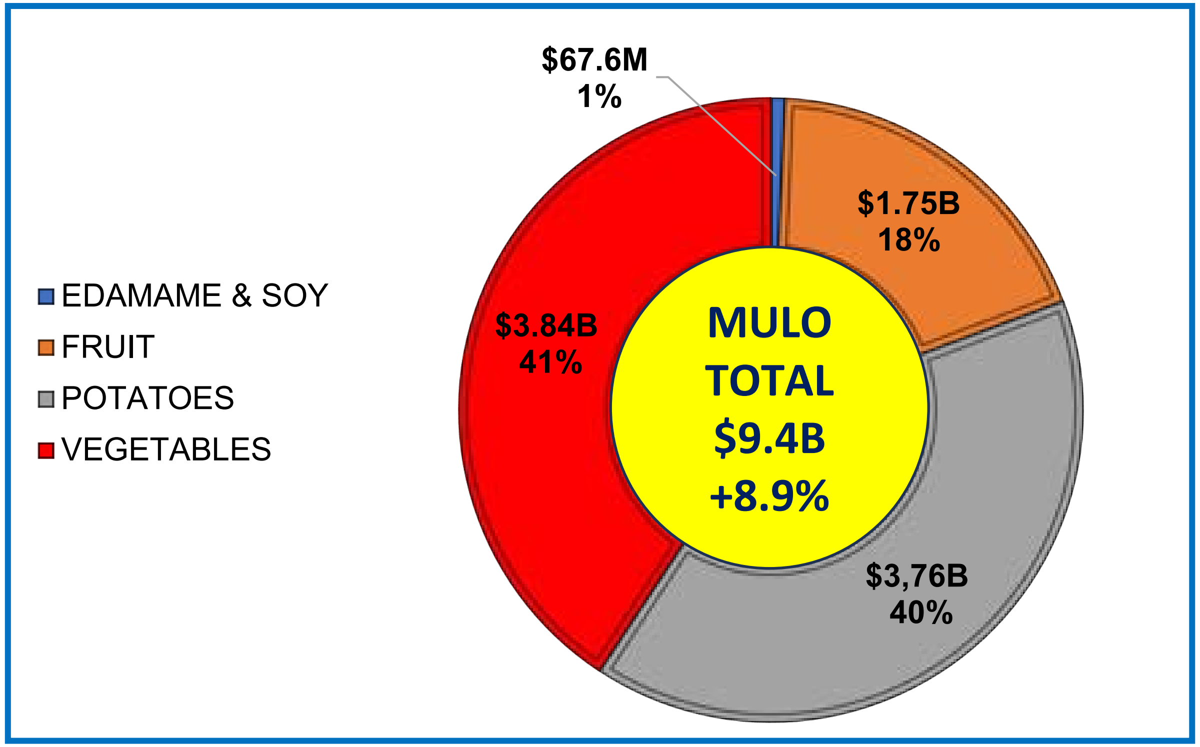




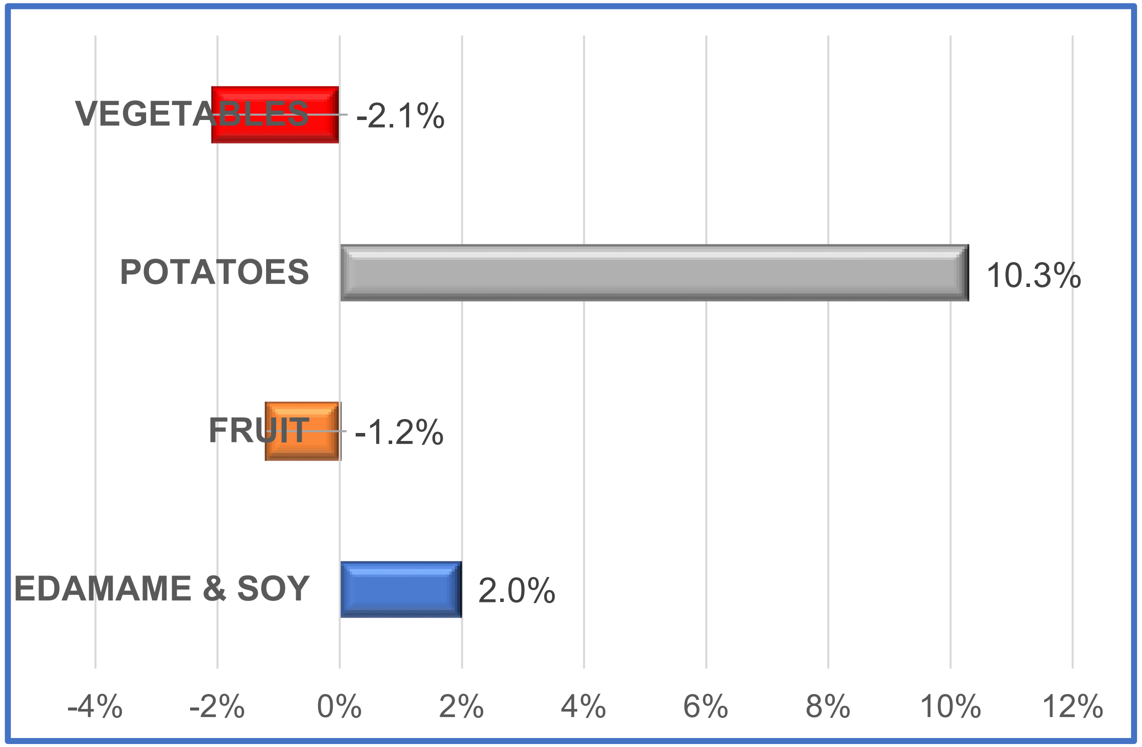
- Total US MULO dollar volume for the category is $9.4B and is performing better than prior year by 2.7%.
- The South region is the largest $ volume region, representing 41% of total MULO sales, followed by Midwest, West and Northeast, respectively.
- All 4 regions and Total US are posting sales that are greater than prior year.

MULO: Frozen Vegetables & Fruits - By Subcategory

MULO Subcategory $ and % Category Share



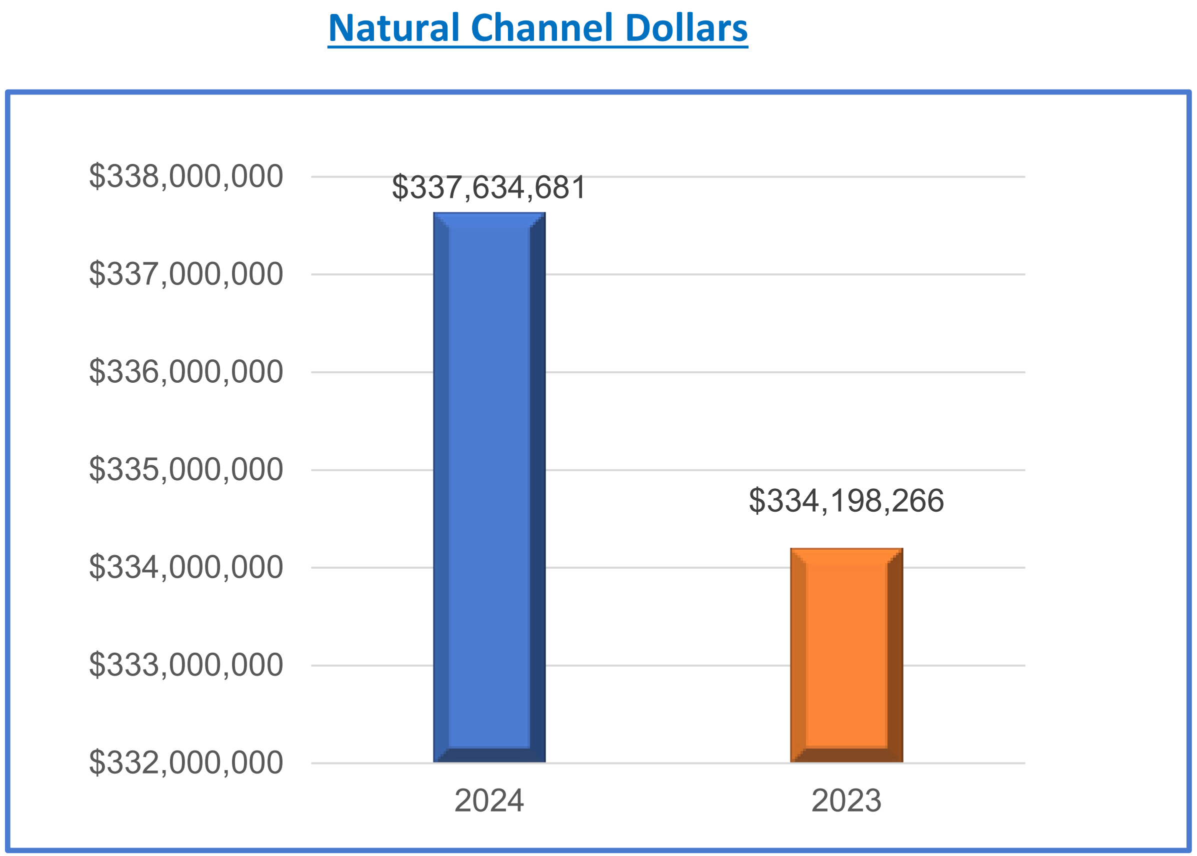
% Dollar Change vs Year Ago

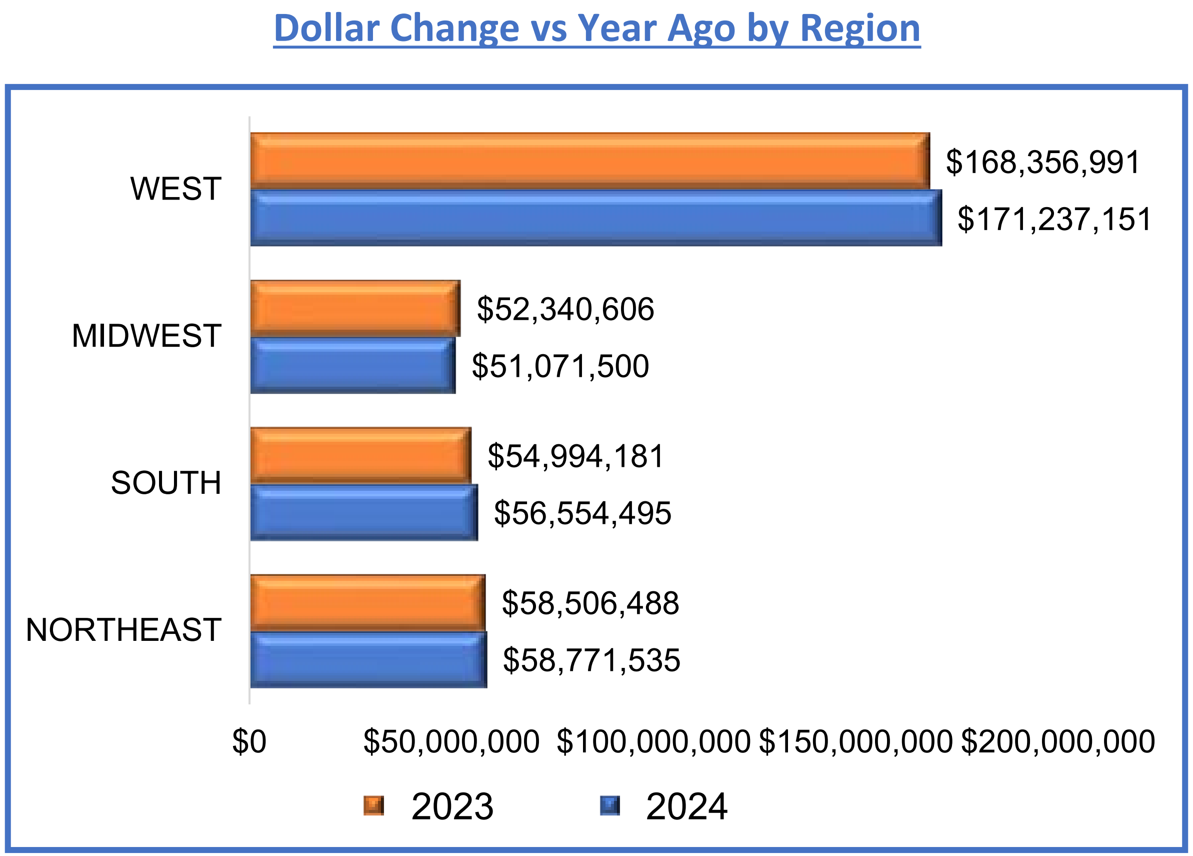


- Frozen Vegetables is the largest subcategory, representing $3.8B, or 41% of total MULO $ volume, with negative growth of -2.1%.
- Frozen Potatoes, Fruit and Edamame & Soy represent the remainder of category volume. Of the remaining Subcategories only Fruit is in decline to prior year. Potatoes has achieved outstanding growth in dollars sales to prior year at +10.3%.

SPINS Satori – 52 weeks ending 8-11-24

Natural Channel: Frozen Vegetables & Fruits - Category



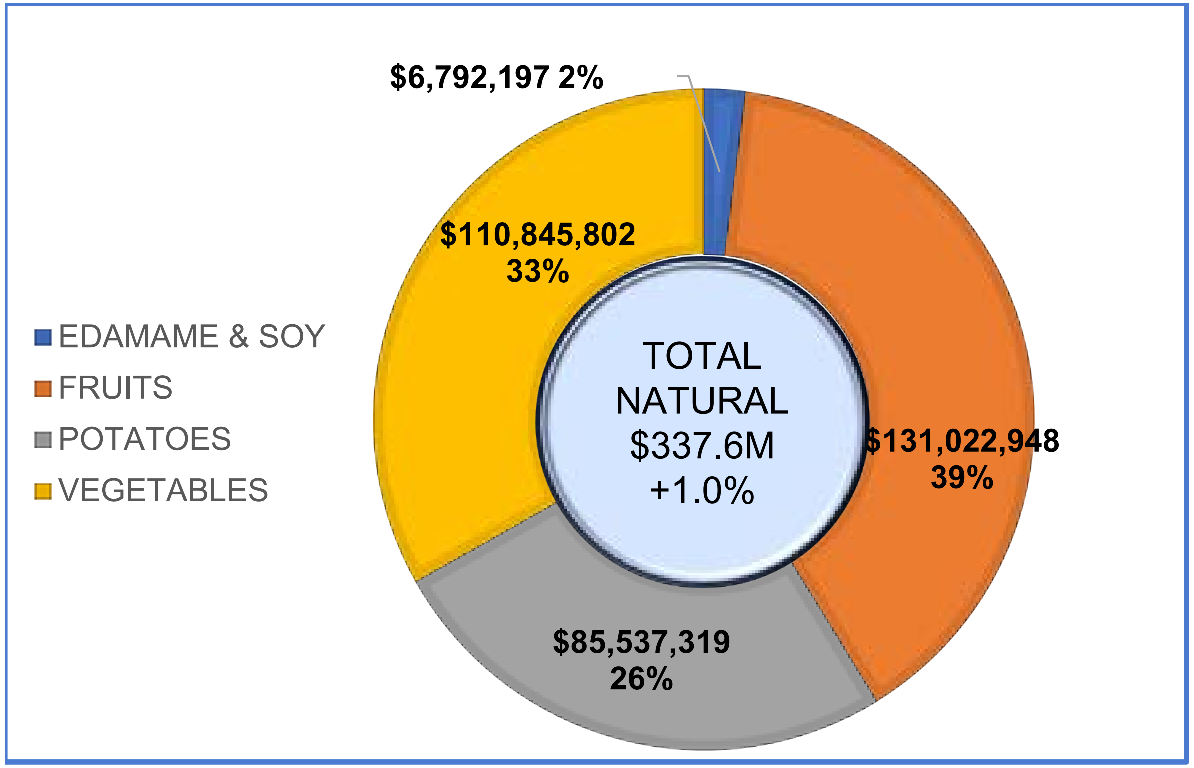


- Natural Channel $ volume for the category is $337.6M and has grown 1.0% over prior year.
- The West region is the largest $ volume region, representing 50% of total Natural Channel category sales, followed by Northeast, Midwest & South regions, respectively.
- All 4 regions, with exception of the Midwest, are posting sales greater than the prior year; the Midwest is in decline -2.4%.

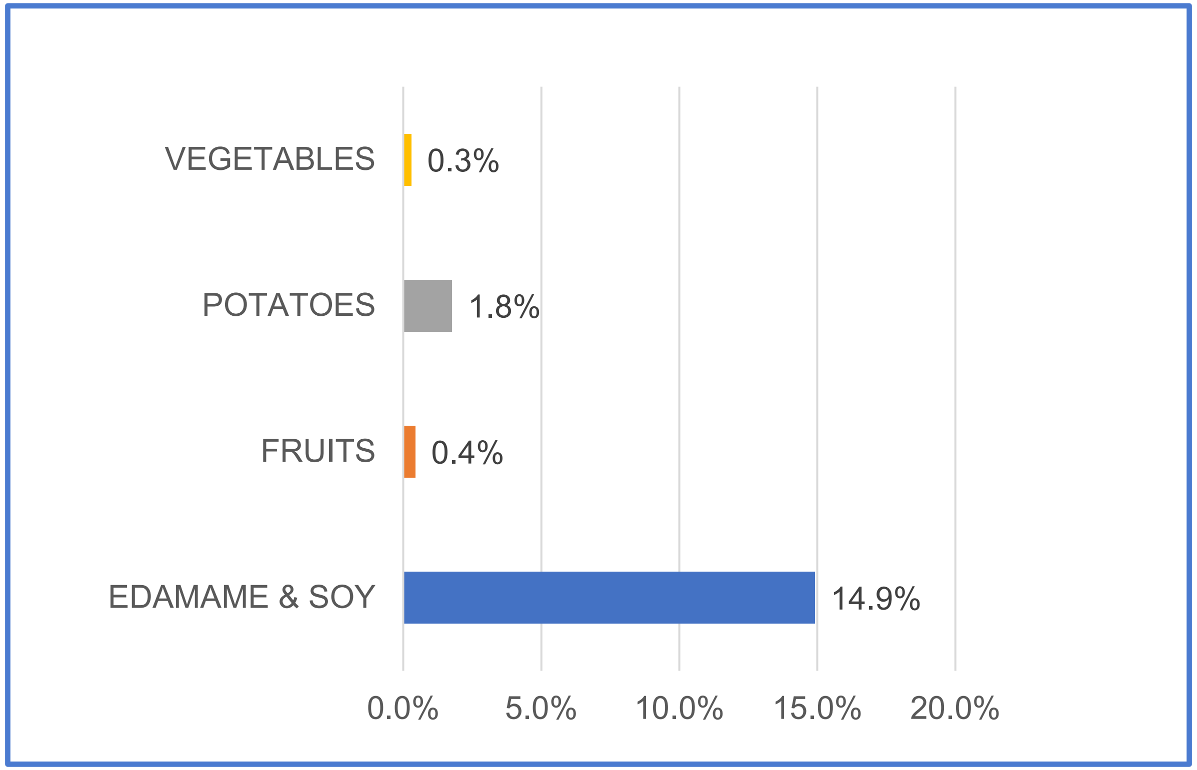
SPINS Satori – 52 weeks ending 8-11-24

Natural Channel: Frozen Vegetables & Fruits - By Subcategory

Natural Channel Subcategory $ and % Category Share



% Dollar Change vs Year Ago



- Frozen Fruits is the largest segment in the Natural Channel, representing 39% of sales $.
- Frozen Vegetables is the 2nd largest segment in the Natural Channel, at 33% of $ volume.
- Frozen Potatoes is the 3rd largest segment at 26% of $ volume.
- Edamame& Soy, the smallest segment, has the largest growth rate to prior year at 14.9%.

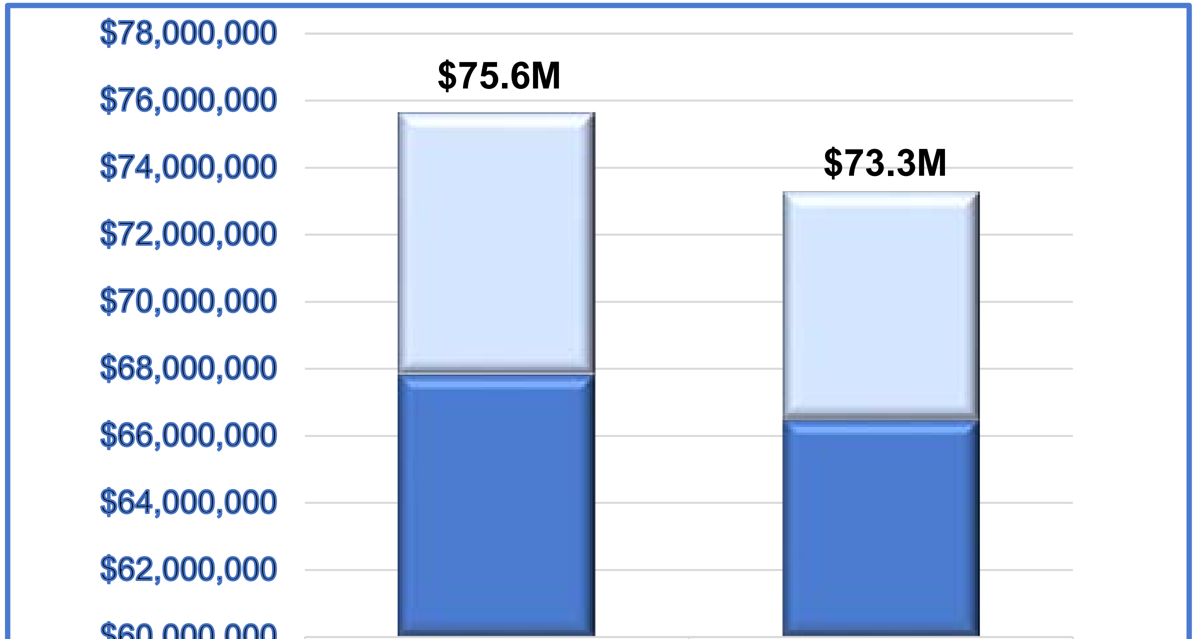
SPINS Satori – 52 weeks ending 8-11-24

Subcategory Performance
Frozen Edamame & Soy

SPINS Satori - 52 Weeks Ending 8-11-24

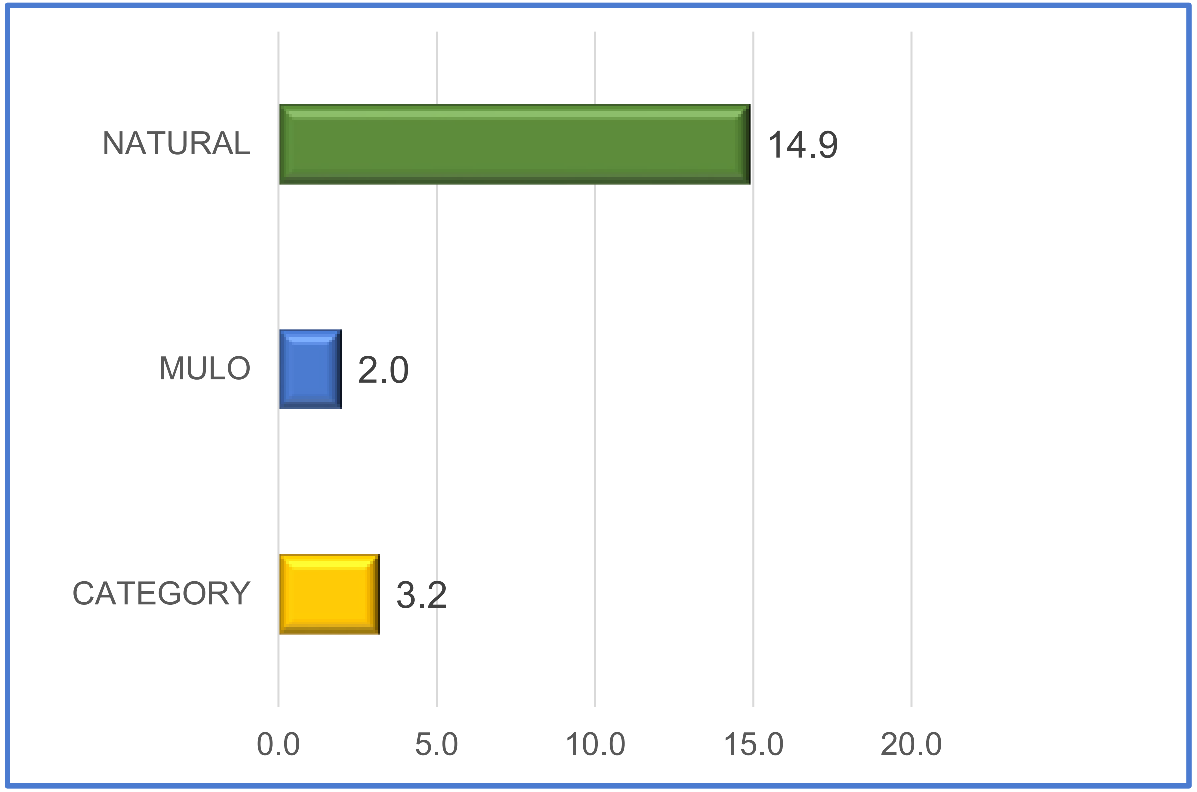
Total US Frozen Edamame & Soy

Total US Dollars



	2024	2023
NATURAL	$7,804,894	$6,792,197
MULO	$67,832,332	$66,485,996

% Dollar Change vs Year Ago

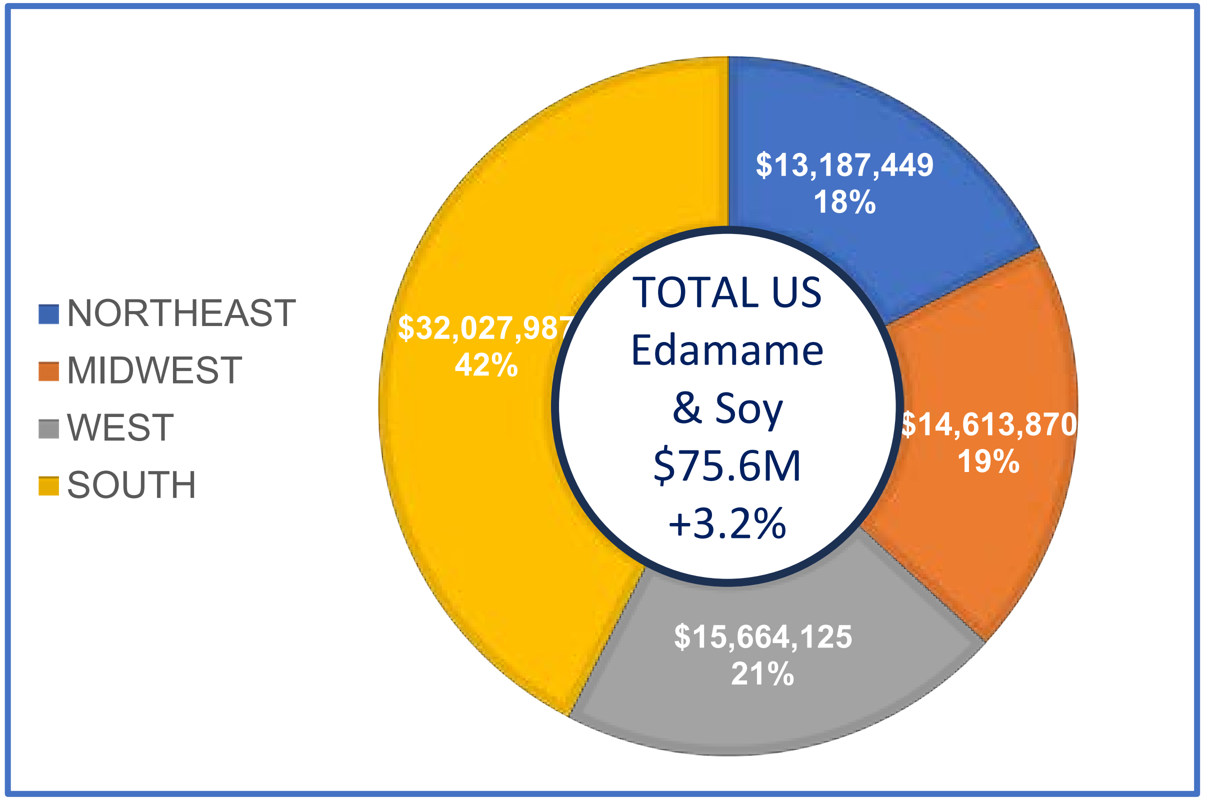


- Total US Frozen Edamame & Soy is a $75.6M subcategory (the smallest of the subcategories) and is performing better than prior year by 3.2%.
- Sales dollars were up in both the Natural Channel (+14.9%) and MULO (+2.0%).
- MULO represents the majority of the subcategory sales but experienced lower growth than the Natural Channel over prior year.

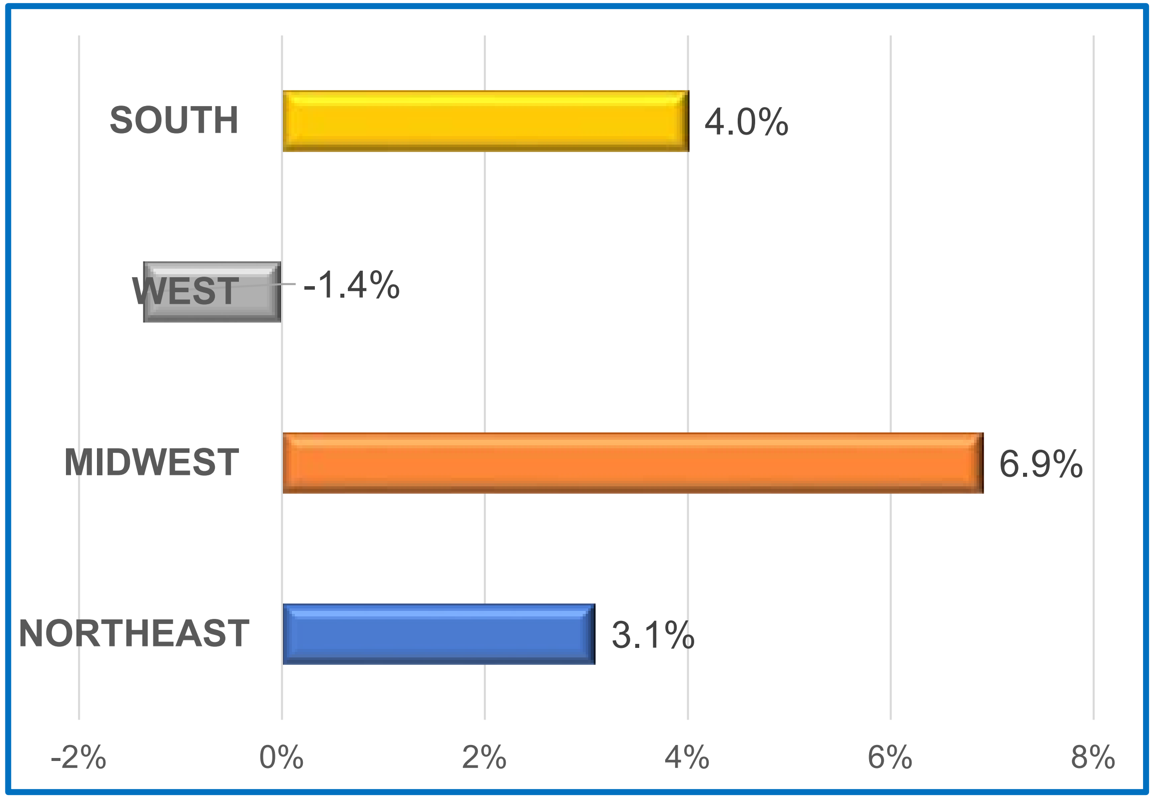
SPINS Satori – 52 weeks ending 8-11-24

Total US Frozen Edamame & Soy Subcategory - By Region

Total Dollars and % Category Share by Region



% Dollar Change vs Year Ago

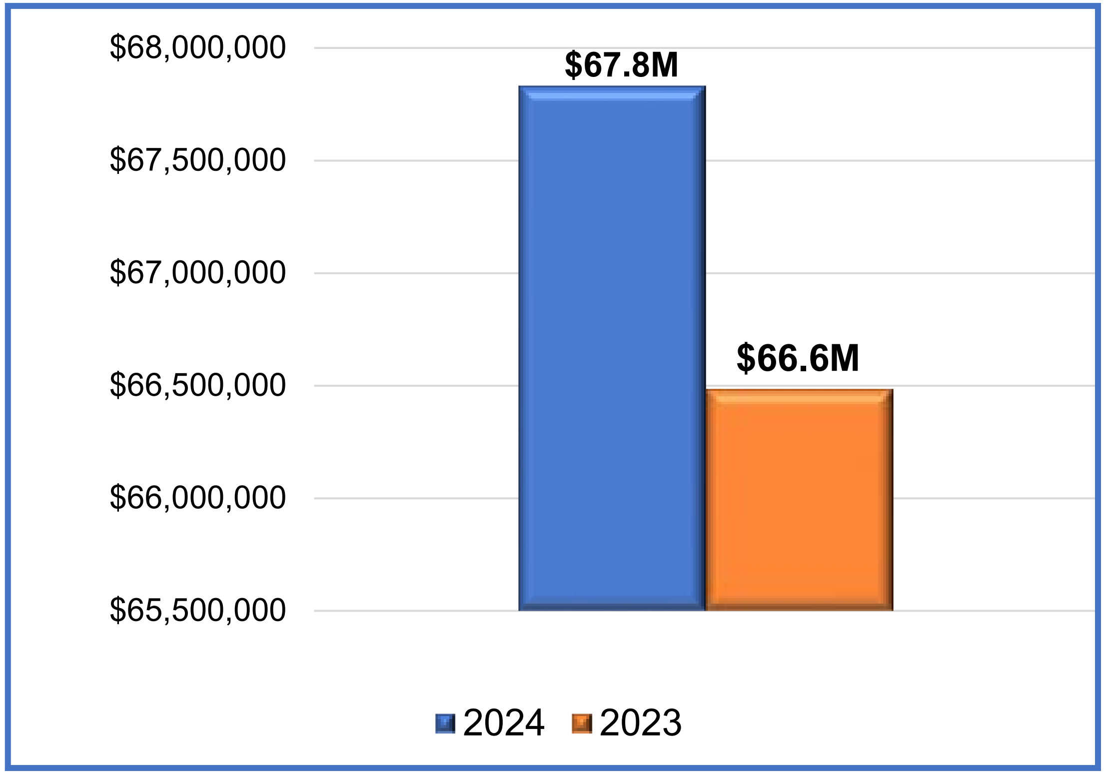


- The South region is the most highly developed region for this subcategory, responsible for 42% of $ volume.
- The 3 remaining regions, West, Northeast and Midwest, are responsible for the remaining $ volume with respective growth/decline at1.4%, 3.1% and 16.9%, respectively.

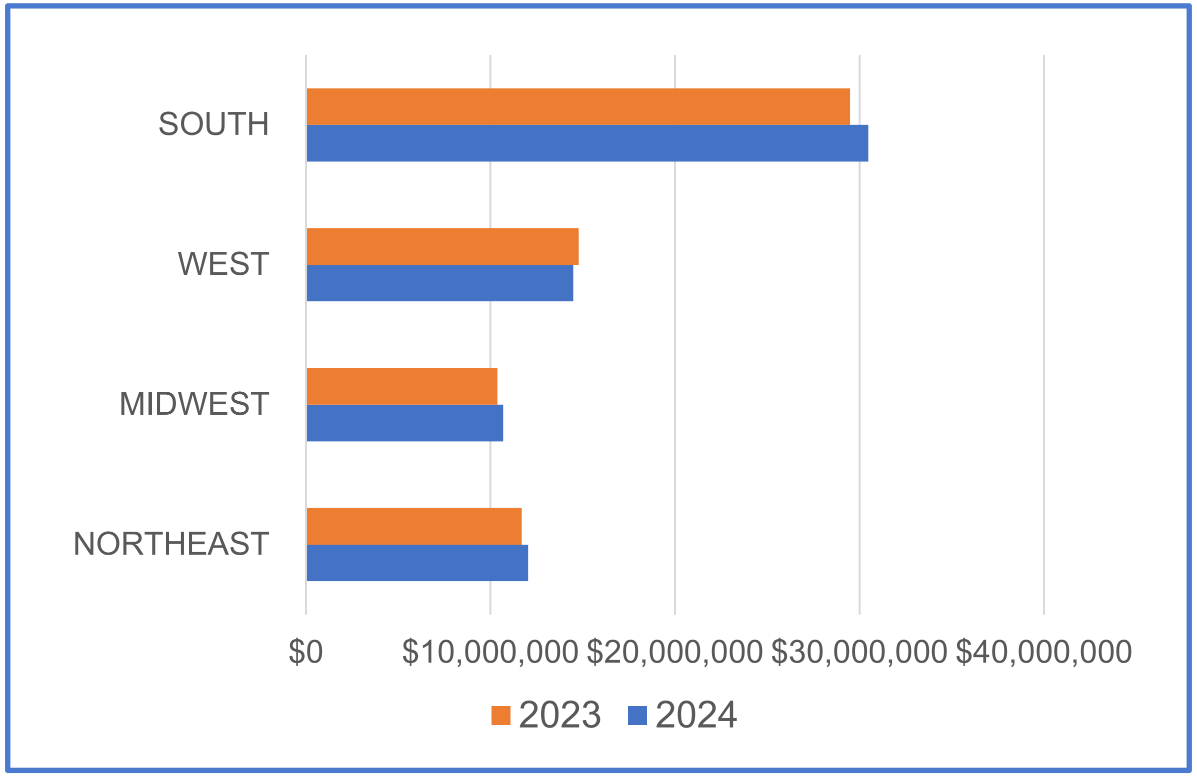
SPINS Satori – 52 weeks ending 8-11-24

Total US MULO: Frozen Edamame & Soy Subcategory

MULO Total US Dollars



Dollar Change vs Year Ago

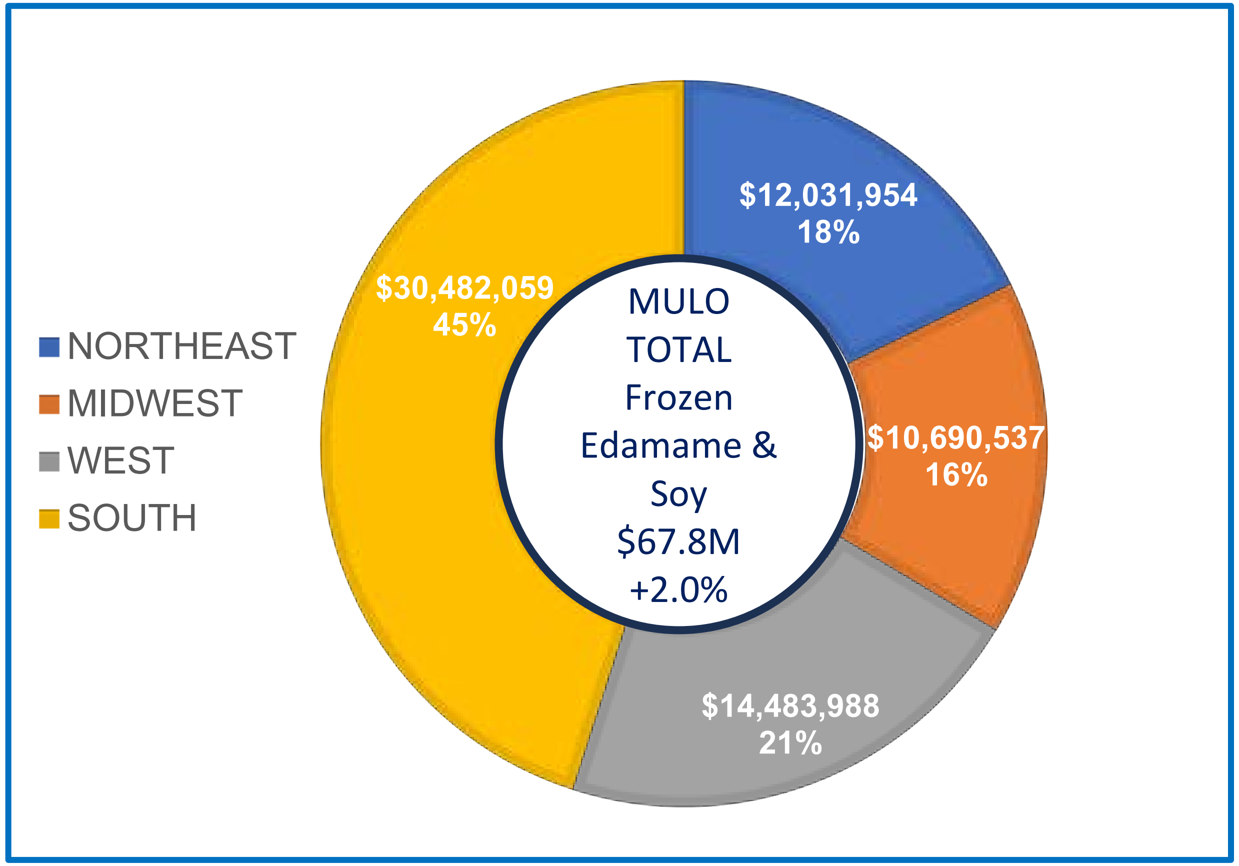


- Total US MULO $ volume for Frozen Edamame & Soy is $67.M and grew 2.0% over prior year.
- The South region is the largest $ volume region, followed by West, Northeast, and Midwest, respectively.
- All 4 census regions and Total US are posting sales that are greater than prior year, except for the West Region, at -2.0%.

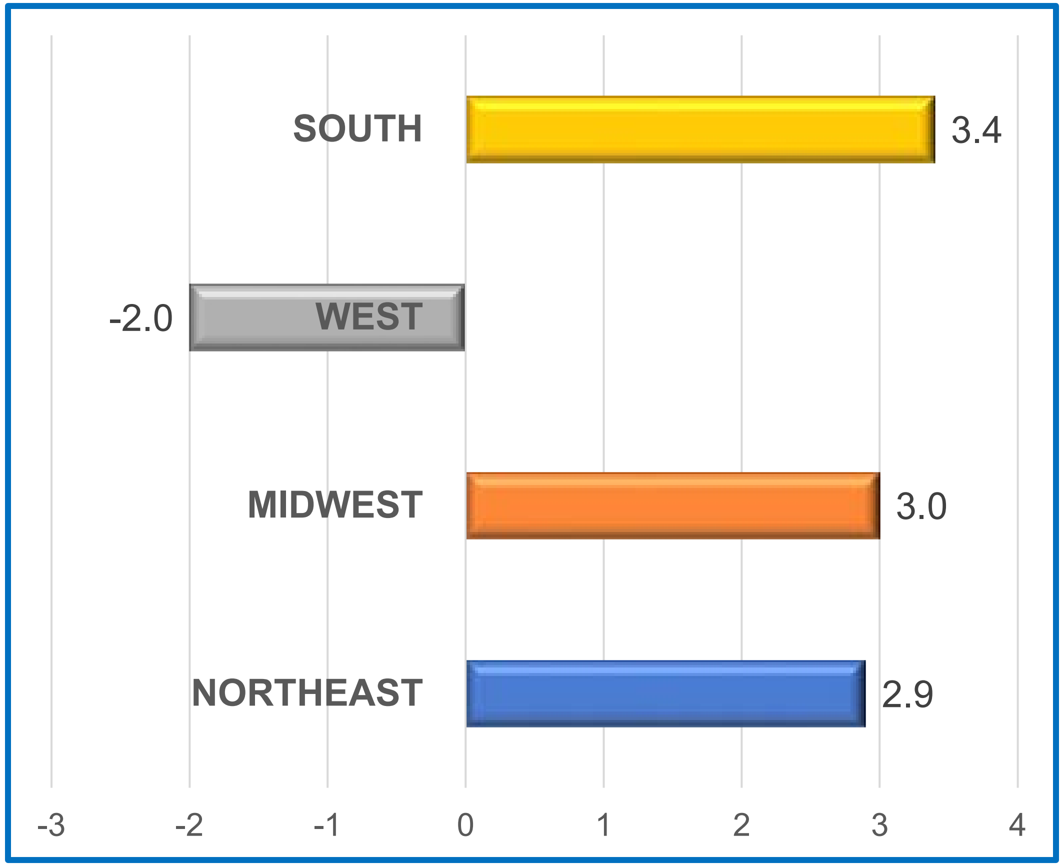
SPINS Satori – 52 weeks ending 8-11-24

Toal US MULO: Frozen Edamame & Soy 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 45% of $ volume with $ growth of 3.4%
- The 3 remaining regions, Northeast, West and Midwest, are responsible for the remaining 55% of $ volume with respective growth/ decline of 2.9%, -2.0%, and 3.0%.

SPINS Satori – 52 weeks ending 8-11-24

MULO: Frozen Edamame & Soy
Top 10 Brands Northeast Census Region

Description	Dollars	Dollars, Yago	Dollars +/- Chg, Yago	Dollars % Chg, Yago	Units	Units, Yago	Units +/- Chg, Yago	Units % Chg, Yago	Avg % ACV	Average Items Selling	ARP	ARP, Yago
FROZEN FRUITS & VEGETABLES	$1,701,494,847	$1,674,153,879	$27,340,968	1.6	507,858,519	514,547,064	-6,688,545	-1.3			3.35	3.25
FZ EDAMAME & SOY	$12,031,954	$11,693,635	$338,318	2.9	4,293,064	4,230,209	62,855	1.5			2.8	2.76
BIRDS EYE	$3,596,850	$3,437,262	$159,589	4.6	1,313,455	1,238,062	75,393	6.1	55.8	1	2.74	2.78
SEAPOINT FARMS	$2,718,050	$2,561,735	$156,315	6.1	844,545	781,639	62,906	8	30.8	1.9	3.22	3.28
PICTSWEET	$2,148,498	$2,109,072	$39,426	1.9	865,627	875,072	-9,446	-1.1	29.3	1.4	2.48	2.41
HANOVER	$1,254,899	$1,268,988	-$14,089	-1.1	505,992	539,144	-33,152	-6.1	15.2	1.7	2.48	2.35
PRIVATE LABEL	$1,139,913	$1,310,604	-$170,691	-13	478,812	547,583	-68,772	-12.6	16.3	1.1	2.38	2.39
WOODSTOCK	$722,463	$561,469	$160,994	28.7	159,220	124,053	35,167	28.3	13.6	1.6	4.54	4.53
PRIVATE LABEL ORGANIC	$237,027	$197,894	$39,133	19.8	72,454	64,141	8,313	13	3.9	1	3.27	3.09
JFC	$84,752	$81,789	$2,963	3.6	21,224	20,456	768	3.8	3.6	1	3.99	4
WEL PAC	$74,347	$76,861	-$2,513	-3.3	20,003	20,669	-666	-3.2	3.4	1	3.72	3.72
CASCADIAN FARM	$54,560	$87,228	-$32,668	-37.5	11,554	19,176	-7,622	-39.7	0.7	1.1	4.72	4.55

- MULO Northeast Frozen Edamame & Soy is showing 2.9% growth over prior year in $ volume with unit sales at 1.5%.
- Private Label brands (retailer brands produced by others) are highly developed in $ sales but are in decline at -13.0% in $ sales and 12.6% in unit sales.
- Private Label Organic, though currently in lower $ sales bracket, is fast growing, at 19.8% in $ sales and 13.0% in unit sales.
- Birds Eye is the lead brand, growing in both $ and unit sales and commands 29% share of total segment $ sales in the Northeast.

SPINS Satori – 52 weeks ending 8-11-24

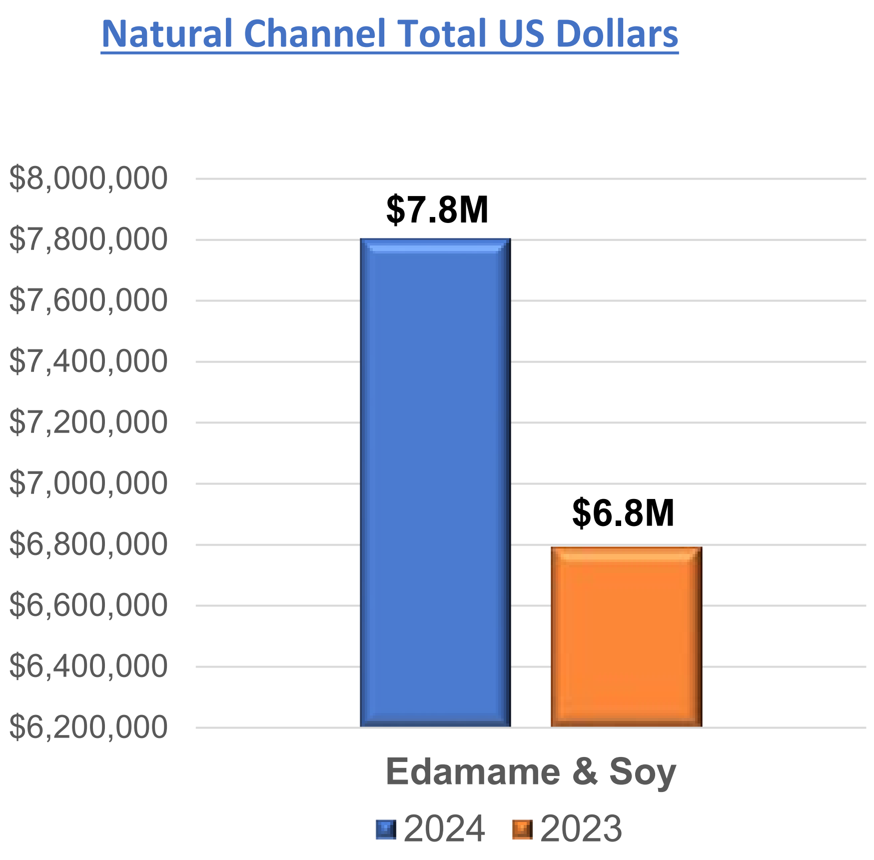
MULO: Frozen Edamame & Soy
Top Markets Northeast Census Region

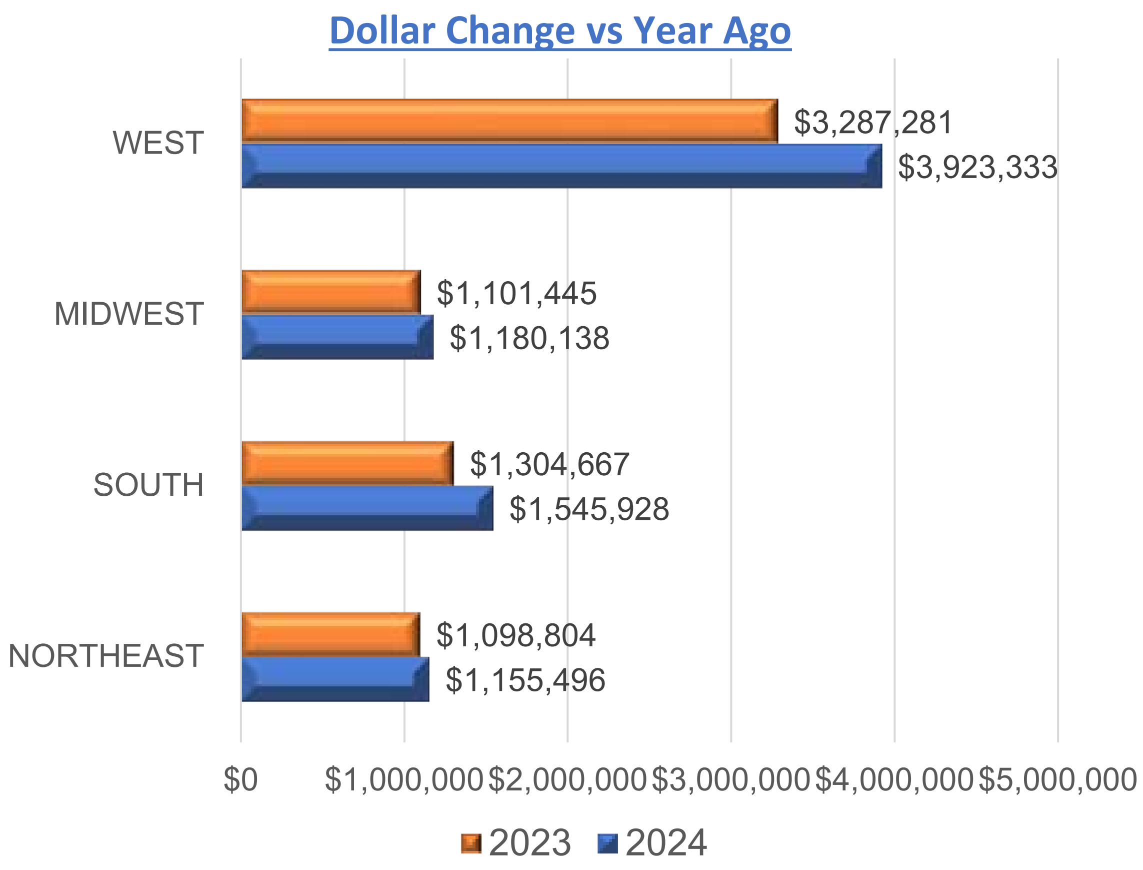
Geography	Description	Dollars	Dollars, Yago	Dollars +/- Chg, Yago	Dollars % Chg, Yago	Units	Units, Yago	Units +/- Chg, Yago	Units % Chg, Yago	TDP	TDP, Yago	ARP	ARP, Yago
NEW YORK, NY - MULO	FZ EDAMAME & SOY	$3,714,866	$3,663,209	$51,656	1.4	1,279,621	1,290,501	-10,880	-0.8	$281	$281	2.9	2.84
BALTIMORE, MD/WASHINGTON D.C. - MULO	FZ EDAMAME & SOY	$2,219,383	$2,161,040	$58,342	2.7	763,153	753,146	10,008	1.3	$285	$276	2.91	2.87
PHILADELPHIA, PA - MULO	FZ EDAMAME & SOY	$1,678,214	$1,630,946	$47,268	2.9	622,212	604,871	17,341	2.9	$287	$278	2.7	2.7
BOSTON, MA - MULO	FZ EDAMAME & SOY	$1,374,601	$1,353,823	$20,777	1.5	508,587	510,215	-1,628	-0.3	$271	$283	2.7	2.65
NEW ENGLAND - MULO	FZ EDAMAME & SOY	$947,985	$855,025	$92,960	10.9	347,062	311,573	35,489	11.4	$240	$257	2.73	2.74
HARRISBURG/SCRANTON, PA - MULO	FZ EDAMAME & SOY	$947,073	$885,696	$61,376	6.9	353,370	334,835	18,535	5.5	$254	$253	2.68	2.65
RICHMOND/NORFOLK, VA - MULO	FZ EDAMAME & SOY	$911,915	$882,595	$29,320	3.3	308,531	304,190	4,341	1.4	$253	$234	2.96	2.9
HARTFORD, CT/SPRINGFIELD, MA - MULO	FZ EDAMAME & SOY	$740,649	$778,082	-$37,433	-4.8	256,080	273,898	-17,819	-6.5	$217	$237	2.89	2.84
PITTSBURGH, PA - MULO	FZ EDAMAME & SOY	$561,795	$554,362	$7,433	1.3	204,250	200,719	3,531	1.8	$239	$289	2.75	2.76
BUFFALO/ROCHESTER, NY - MULO	FZ EDAMAME & SOY	$505,095	$489,503	$15,591	3.2	169,425	168,807	618	0.4	$339	$327	2.98	2.9
ALBANY, NY - MULO	FZ EDAMAME & SOY	$307,660	$280,355	$27,305	9.7	95,397	89,323	6,074	6.8	$236	$250	3.23	3.14
PROVIDENCE, RI - MULO	FZ EDAMAME & SOY	$217,914	$209,238	$8,676	4.1	78,653	75,299	3,354	4.5	$197	$223	2.77	2.78
SYRACUSE, NY - MULO	FZ EDAMAME & SOY	$201,946	$192,990	$8,957	4.6	66,484	65,238	1,246	1.9	$250	$250	3.04	2.96

- New York is the largest market for Edamame & Soy, posting positive $ sales growth of 1.1% and a slight decline in unit growth.
- New England, the 5th largest market, responsible for a little less than $1M is sales, is showing the highest dollar growth and unit growth of all markets in MULO.

SPINS Satori – 52 weeks ending 8-11-24

Natural Channel: Edamame & Soy - Subcategory

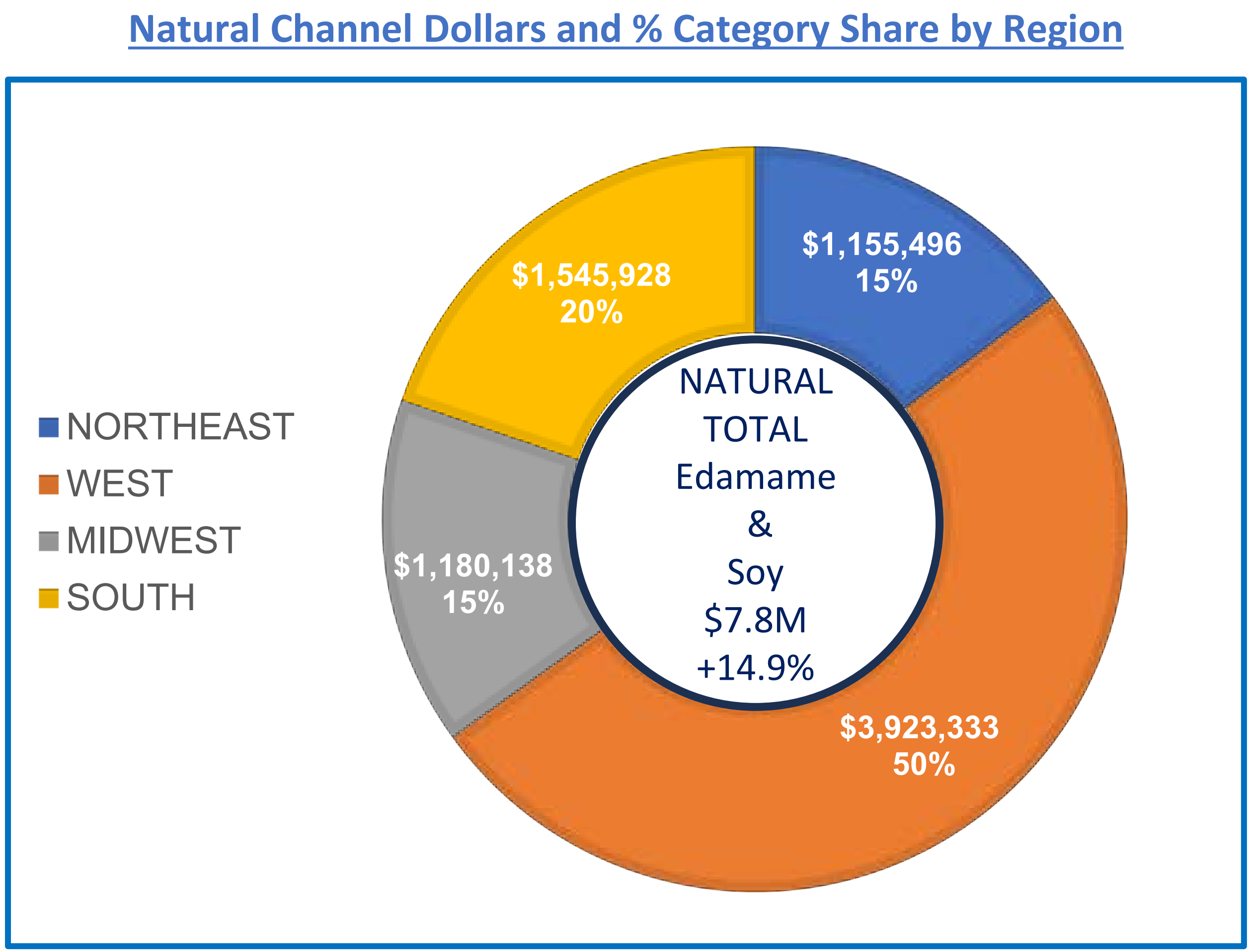


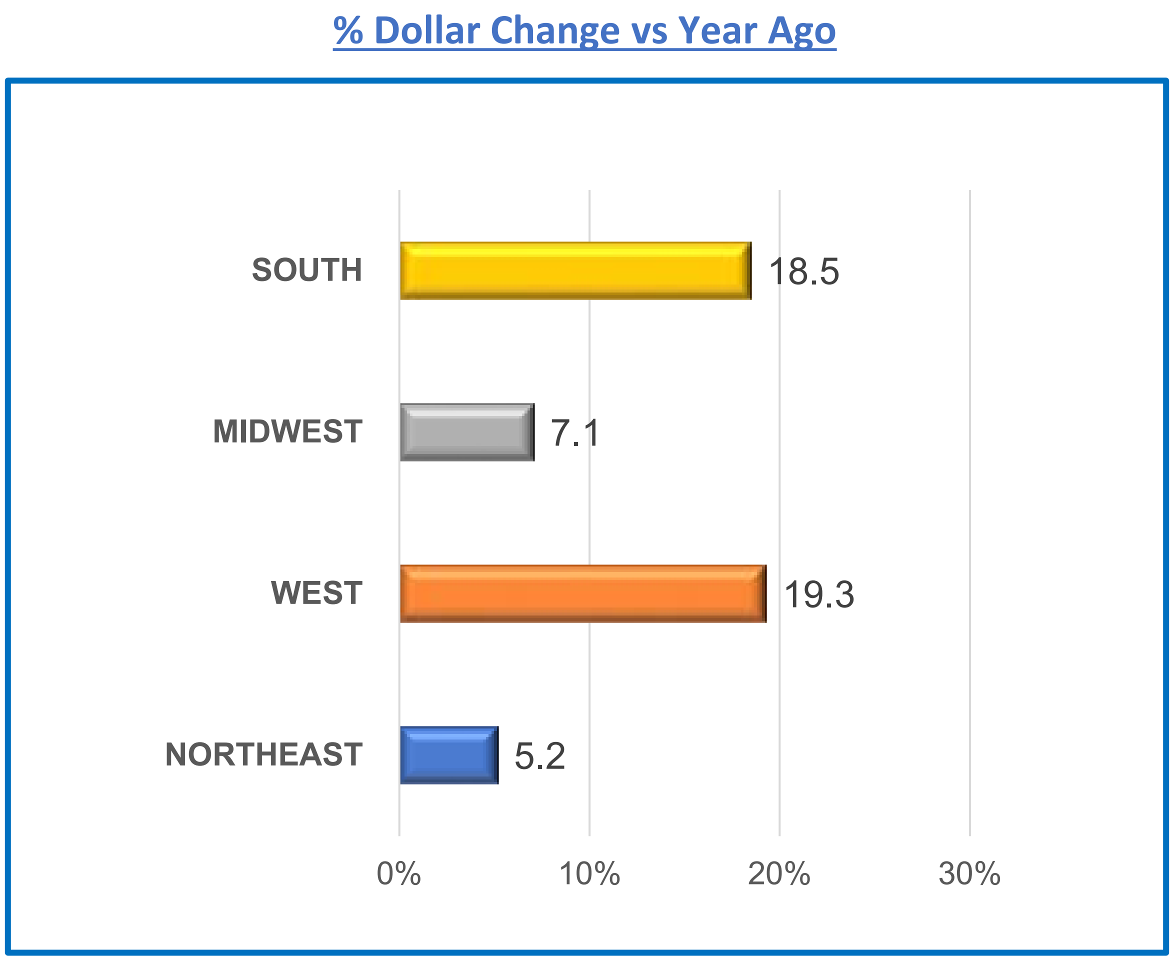


- Total Natural Channel $ volume for the Edamame & Soy subcategory is $7.8M and is up 14.9% over prior year.
- The West region is the largest $ volume region, followed by the South, Midwest, Northeast, respectively.
- All 4 census regions and Total US are posting sales that are greater than prior year.

SPINS Satori – 52 weeks ending 8-11-24

Natural Channel: Edamame & Soy - By Region





- The West region is the most highly developed region for this subcategory, responsible for 50% of $ volume and is up 19.3% over prior year.
- The 3 remaining regions, Northeast, South and Midwest, are responsible for the remaining 49% of $ volume, with respective growth of 5.2%, 18.5%, and 7.1%. The West experienced the highest % growth among the regions, followed by the South.

SPINS Satori – 52 weeks ending 8-11-24

Natural Channel: Frozen Edamame & Soy Subcategory
Top 10 Brands Northeast Census Region

Description	Dollars	Dollars, Yago	Dollars +/- Chg, Yago	Dollars % Chg, Yago	Units	Units, Yago	Units +/- Chg, Yago	Units % Chg, Yago	Avg % ACV	TDP	Average Items Selling	ARP	ARP, Yago
FROZEN FRUITS & VEGETABLES	$58,771,535	$58,506,488	$265,047	0.5	11,984,415	12,403,834	-419,419	-3.4		14232		4.9	4.72
FZ EDAMAME & SOY	$1,155,496	$1,098,804	$56,692	5.2	317,349	306,231	11,118	3.6		339.6		3.64	3.59
SEAPOINT FARMS	$430,864	$422,688	$8,176	1.9	110,787	111,195	-408	-0.4	58.7	151.4	2.4	3.89	3.8
WOODSTOCK	$429,636	$301,716	$127,920	42.4	124,556	88,377	36,179	40.9	52.8	80.3	1.3	3.45	3.41
CASCADIAN FARM	$90,823	$177,129	-$86,306	-48.7	22,673	48,443	-25,770	-53.2	15.7	23.1	1	4.01	3.66
BIRDS EYE	$75,788	$72,250	$3,538	4.9	20,299	20,158	141	0.7	31.4	40.7	1	3.73	3.58
PRIVATE LABEL	$47,871	$51,174	-$3,304	-6.5	13,524	15,349	-1,825	-11.9	1.9	4.6	2.3	3.54	3.33
HANOVER	$40,959	$39,992	$967	2.4	14,229	12,979	1,250	9.6	12.5	27.6	1.7	2.88	3.08
PRIVATE LABEL ORGANIC	$28,615	$20,305	$8,311	40.9	7,929	5,618	2,311	41.1	12.3	14.3	1	3.61	3.61
PICTSWEET	$6,484	$7,104	-$620	-8.7	2,224	2,528	-304	-12	2.8	3.2	1	2.92	2.81
SNO-PAC	$3,845	$4,575	-$730	-16	985	1,190	-206	-17.3	1.4	2.6	1	3.9	3.84
NEIGHBORING FOOD	$610	$319	$291	91.4	144	67	76	113.4	1.5	3.6	1	4.25	4.74

- Natural Channel, Northeast Frozen Edamame & Soy, is showing 5.2% growth over prior year in $ sales in the Northeast and is also positive in unit sales, at 3.6%. Increase in price is driving $ sales increases.
- Searspoint is the largest $ volume brand, garnering 37% of the subcategory $ sales.
- Woodstock, the 2nd largest brand in $ volume, is the highest growth brand in the subcategory.
- Private Label Organic, in the Natural Channel, is developing in both $ and unit growth at a very high rate.

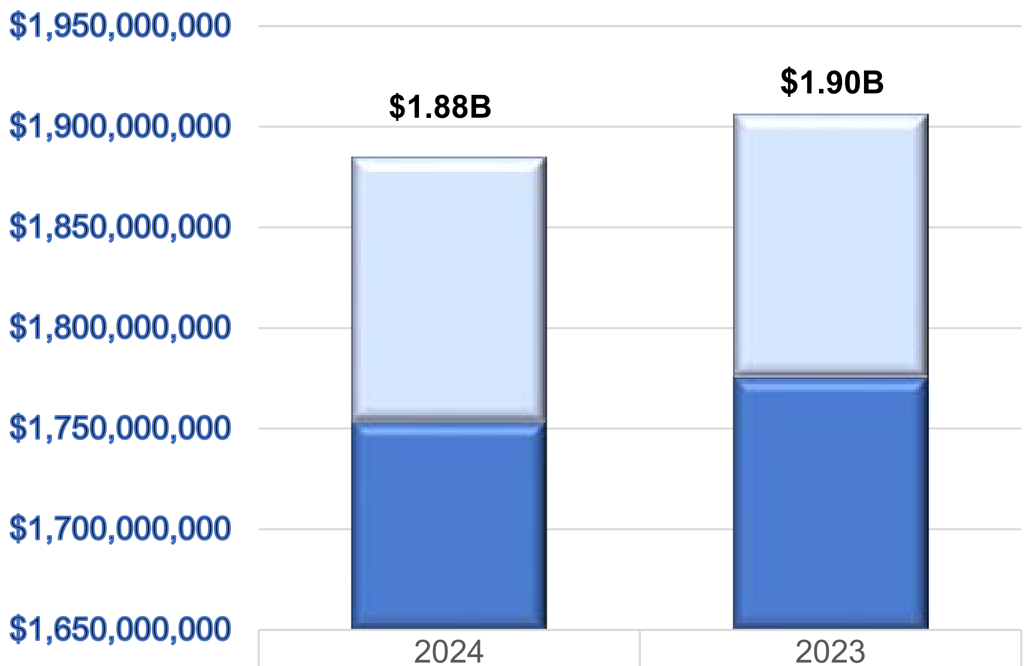
SPINS Satori – 52 weeks ending 8-11-24

Subcategory Performance
Frozen Fruits

SPINS Satori - 52 Weeks Ending 8-11-24

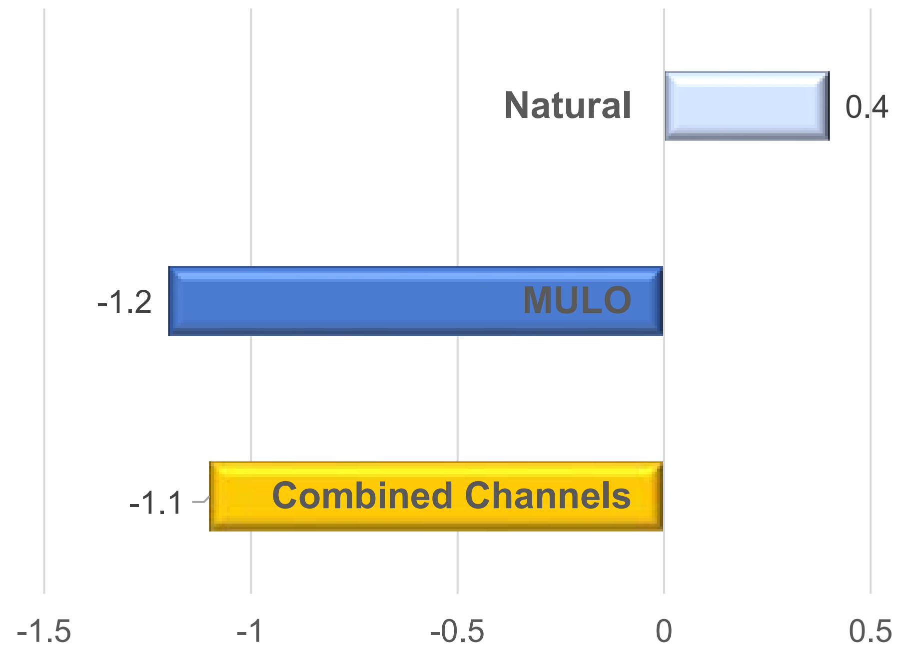
Total US Frozen Fruits Subcategory

Total US Dollars



	2024	2023
NATURAL	$131,603,244	$131,022,948
MULO	$1,753,413,559	$1,775,271,675

% Dollar Change vs Year Ago

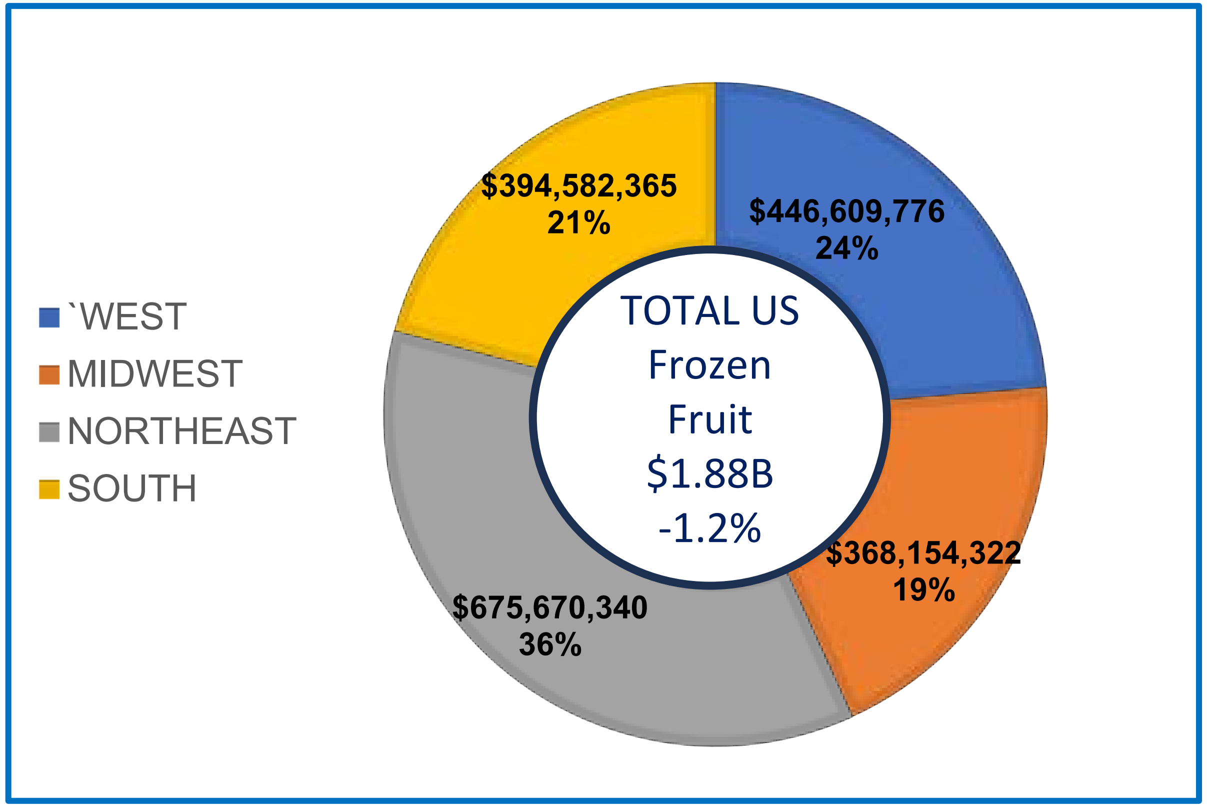


- Total US Frozen Fruits is a $1.88B Category and is in slight decline to prior year by -1.1%.
- Sales dollars were slightly up in the Natural Channel (+0.4%) and in decline in MULO (-1.2%).

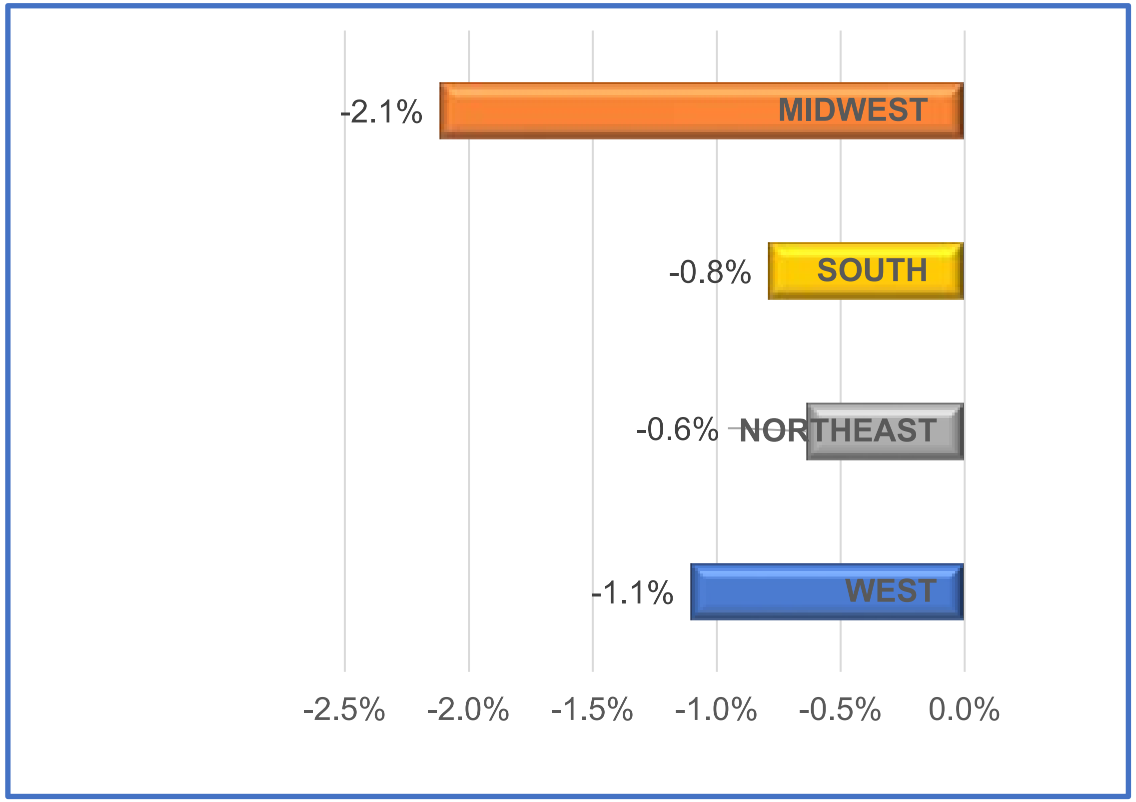
SPINS Satori – 52 weeks ending 8-11-24

Total Frozen Fruits - By Region

Total Dollars and % Category Share by Region



% Dollar Change vs Year Ago

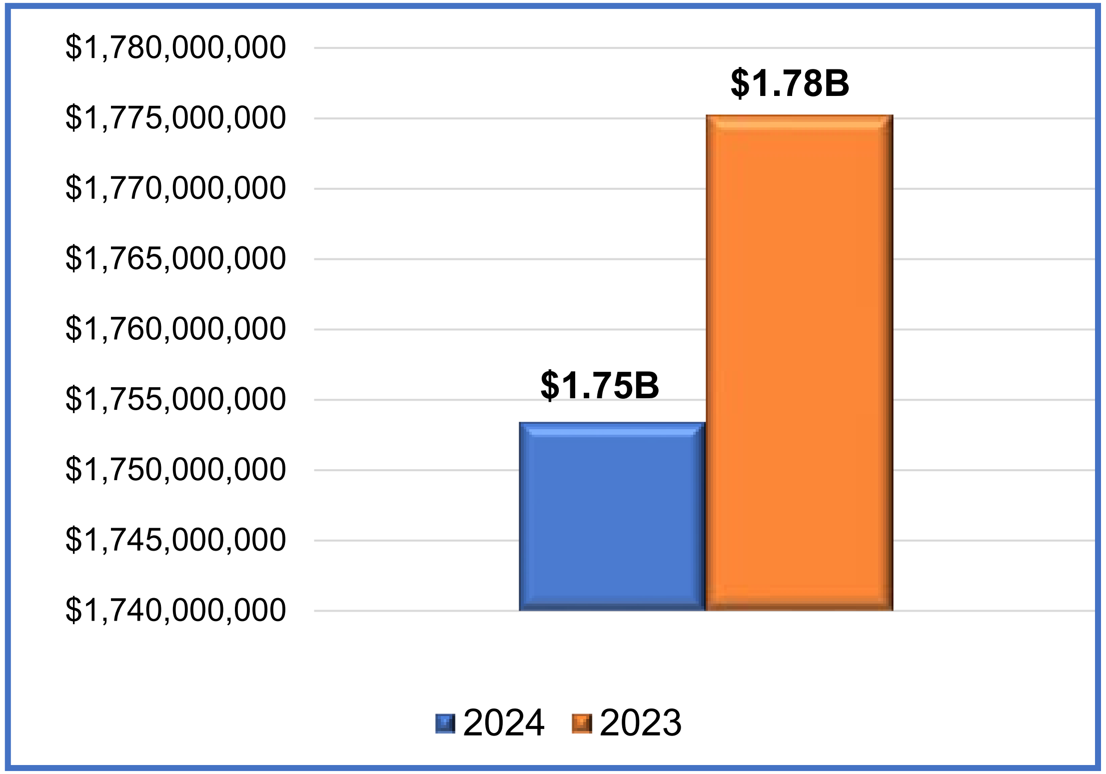


- The Northeast region is the most highly developed region for this sub-category, responsible for 36% of $ volume but with the lowest growth decline at -0.6%.
- The 3 remaining regions, West, South and Midwest, are responsible for the remaining $ volume with respective declines of -1.1%, 0.8 % and -2.1%.

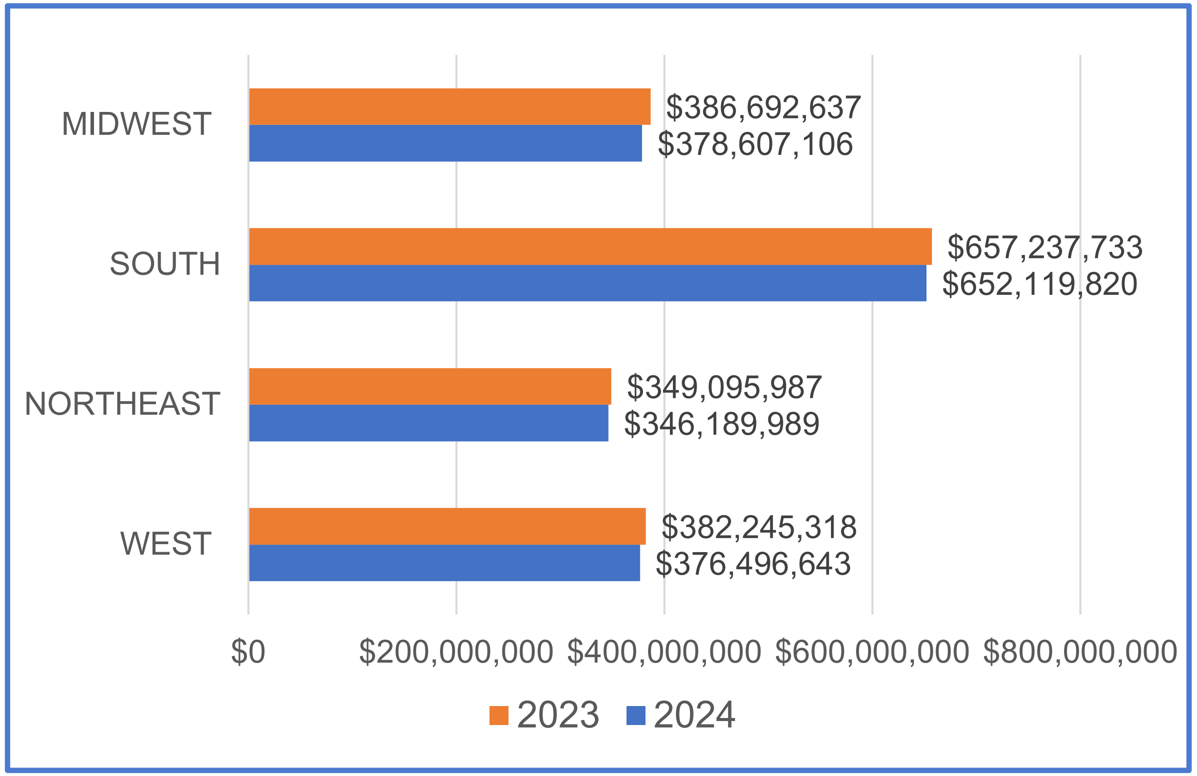
SPINS Satori – 52 weeks ending 8-11-24

Total US MULO: Frozen Fruits Subcategory

MULO Total US Dollars



Dollar Change vs Year Ago

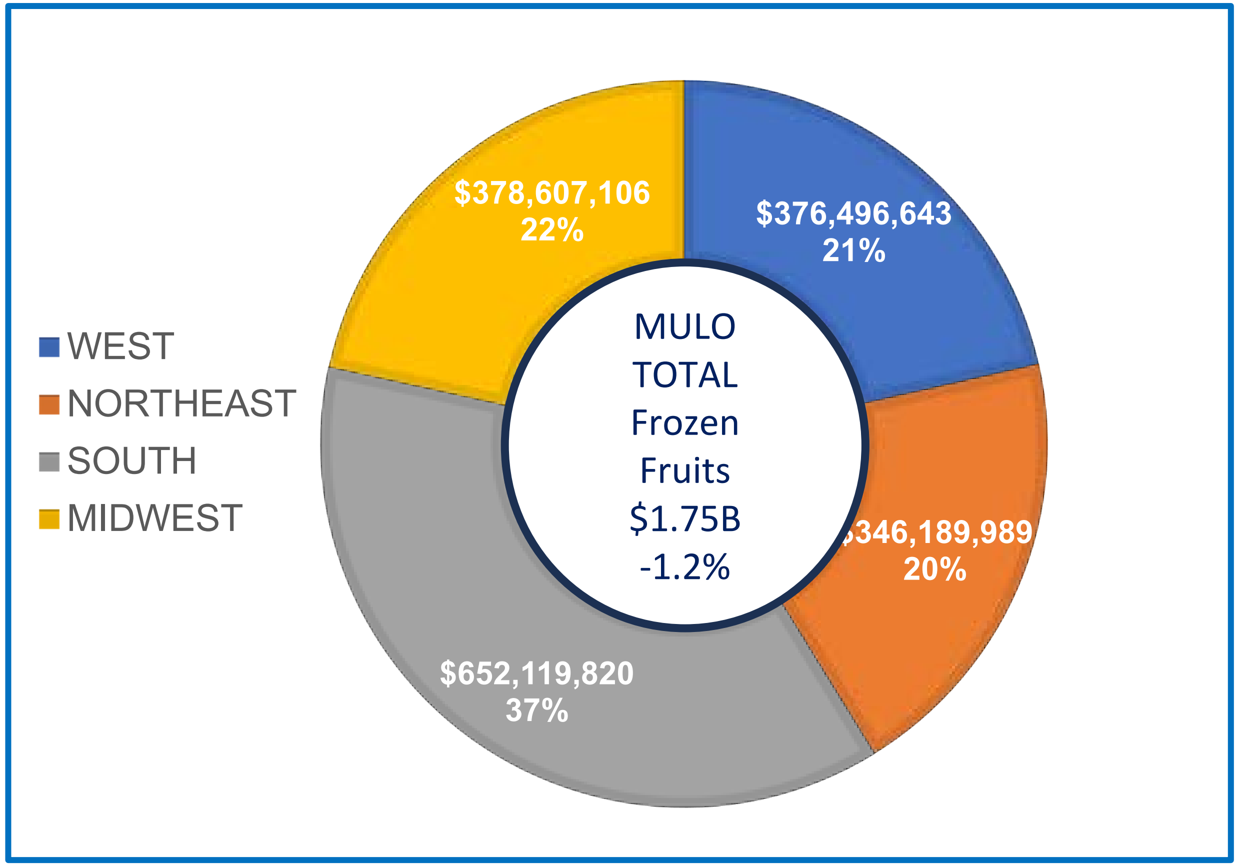


- Total US MULO $ volume for Frozen Fruits is $1.75B and is in decline -1.2% over prior year.
- The South region is the largest $ volume region, followed by West, Northeast and Midwest, respectively.
- All 4 census regions and Total US are posting sales that are lesser than prior year.

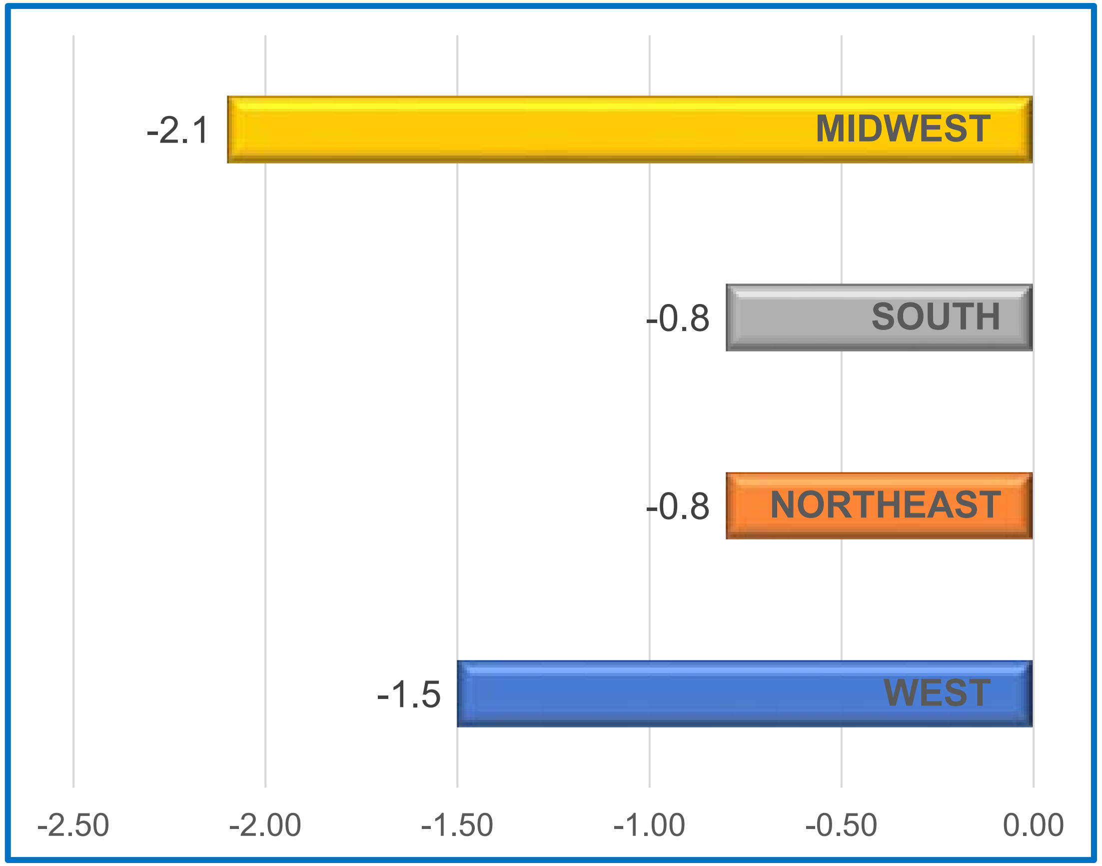
SPINS Satori – 52 weeks ending 8-11-24

MULO: Frozen Fruits 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 37% of $ volume with decline of -0.8%.
- The 3 remaining regions, West, Northeast and Midwest, are responsible for the remaining 63% of $ volume with respective declines of 1.5%, -0.8% and -2.1%.

SPINS Satori – 52 weeks ending 8-11-24

MULO: Frozen Fruits
Top 10 Brands Northeast Census Region

Description	Dollars	Dollars, Yago	Dollars +/- Chg, Yago	Dollars % Chg, Yago	Units	Units, Yago	Units +/- Chg, Yago	Units % Chg, Yago	Avg % ACV	TDP	Average Items Selling	ARP	ARP, Yago
FROZEN FRUITS & VEGETABLES	$1,701,494,847	$1,674,153,879	$27,340,968	1.6	507,858,519	514,547,064	-6,688,545	-1.3		20337.9		3.35	3.25
FZ FRUITS	$346,189,989	$349,095,987	-$2,905,999	-0.8	56,450,850	56,575,449	-124,600	-0.2		3582.9		6.13	6.17
PRIVATE LABEL	$172,558,149	$166,528,875	$6,029,274	3.6	32,235,317	31,005,015	1,230,302	4	88.9	931.2	10.2	5.35	5.37
WYMANS	$66,218,154	$64,631,617	$1,586,537	2.5	7,111,898	6,933,815	178,083	2.6	75	540.8	7.1	9.31	9.32
DOLE	$28,441,553	$36,545,941	-$8,104,388	-22.2	3,379,912	4,371,995	-992,083	-22.7	64.3	561.4	8.3	8.41	8.36
PRIVATE LABEL ORGANIC	$24,134,887	$24,781,203	-$646,317	-2.6	3,596,258	3,763,010	-166,753	-4.4	69.5	225.8	3.1	6.71	6.59
GOYA	$14,477,362	$14,513,305	-$35,943	-0.2	3,869,252	3,983,914	-114,662	-2.9	51.9	313.8	5.8	3.74	3.64
CAMPOVERDE	$7,582,834	$11,097,471	-$3,514,637	-31.7	608,102	878,976	-270,873	-30.8	28.8	185.2	4.9	12.47	12.63
SAMBAZON	$4,010,453	$4,783,768	-$773,315	-16.2	625,510	697,052	-71,542	-10.3	38.2	83.3	1.9	6.41	6.86
WOODSTOCK	$3,337,807	$3,422,679	-$84,872	-2.5	510,924	507,524	3,400	0.7	22.4	122.5	4.4	6.53	6.74
EARTHBOUND FARM	$3,288,288	$3,693,543	-$405,255	-11	406,404	451,120	-44,716	-9.9	17	61.9	2.7	8.09	8.19
PITAYA FOODS	$3,155,382	$2,589,605	$565,776	21.8	641,536	514,240	127,296	24.8	31.4	144.6	3.9	4.92	5.04
LA FE	$2,370,511	$2,041,978	$328,533	16.1	663,314	610,566	52,748	8.6	12	64.5	4.2	3.57	3.34

- Frozen Fruits, the 2nd largest subcategory in MULO, is in decline -0.8% $ volume over prior year in the Northeast, and is in slight decline in unit volume, at -0.2%.
- Private Label is the leading brand, within this subcategory in the Northeast, with $346M in $ volume, growing +3.6%, and is also growing in unit volume at +4.0%.
- Dole, ranking 3rd in this subcategory in overall $ volume, is registering a -22.2% decline and is showing a -22.7% decrease in unit volume, year over year.
- Maine's own Wyman's brand is the #2 brand in the overall subcategory, posting a 2.5% increase in dollar volume and a 2.6% units volume increase.

SPINS Satori – 52 weeks ending 8-11-24

MULO: Frozen Fruits
Top Markets Northeast Census Region

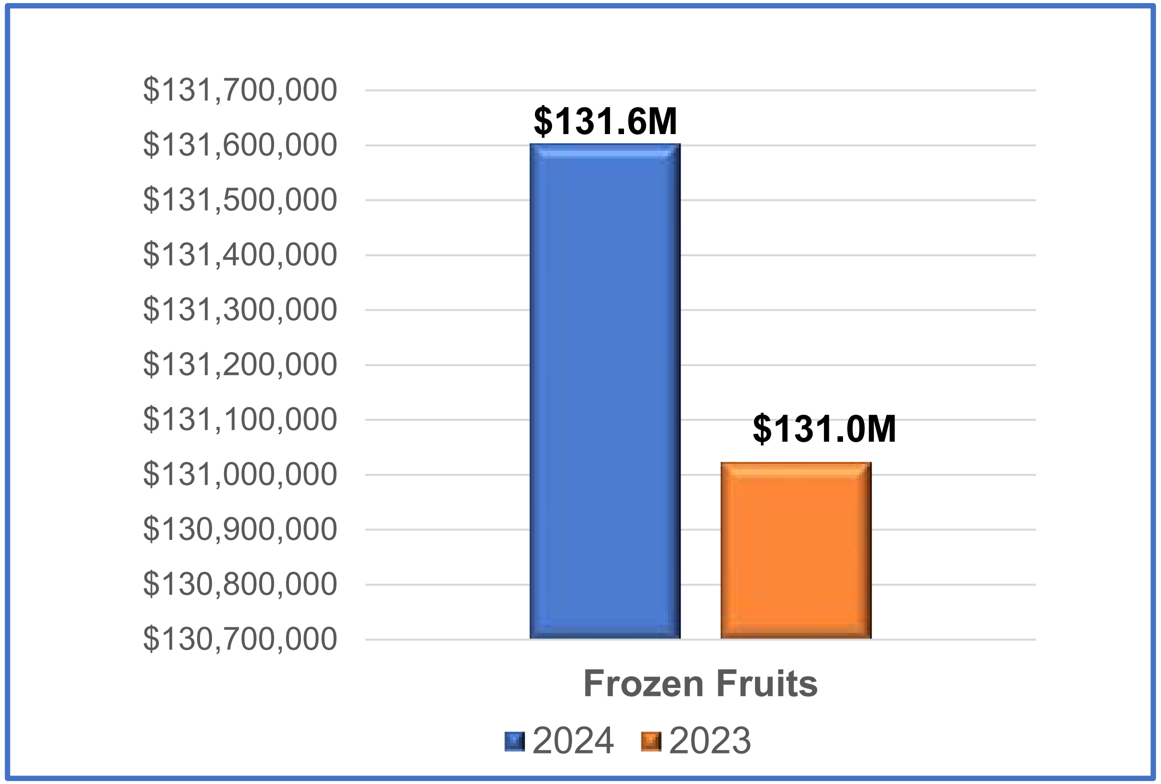
Geography	Description	Dollars	Dollars, Yago	Dollars +/- Chg, Yago	Dollars % Chg, Yago	Units	Units, Yago	Units +/- Chg, Yago	Units % Chg, Yago	TDP	TDP, Yago	ARP	ARP, Yago
NEW YORK, NY - MULO	FZ FRUITS	$95,465,652	$96,861,871	-$1,396,218	-1.4	15,670,694	15,656,622	14,072	0.1	$3,694	$3,750	6.09	6.19
BALTIMORE, MD/WASHINGTON D.C. - MULO	FZ FRUITS	$54,111,116	$55,620,915	-$1,509,799	-2.7	8,060,015	8,236,860	-176,845	-2.1	$3,433	$3,382	6.71	6.75
BOSTON, MA - MULO	FZ FRUITS	$46,441,069	$46,481,539	-$40,470	-0.1	7,513,574	7,617,374	-103,800	-1.4	$4,389	$4,300	6.18	6.1
PHILADELPHIA, PA - MULO	FZ FRUITS	$39,003,274	$40,886,926	-$1,883,651	-4.6	6,460,686	6,620,795	-160,110	-2.4	$3,476	$3,628	6.04	6.18
NEW ENGLAND - MULO	FZ FRUITS	$36,412,385	$35,614,484	$797,900	2.2	5,564,436	5,426,091	138,345	2.5	$4,045	$3,779	6.54	6.56
HARRISBURG/SCRANTON, PA - MULO	FZ FRUITS	$24,642,212	$24,815,417	-$173,205	-0.7	4,207,235	4,327,710	-120,475	-2.8	$3,728	$3,842	5.86	5.73
HARTFORD, CT/SPRINGFIELD, MA - MULO	FZ FRUITS	$22,423,860	$22,636,609	-$212,749	-0.9	3,852,060	3,834,800	17,260	0.5	$3,379	$3,494	5.82	5.9
RICHMOND/NORFOLK, VA - MULO	FZ FRUITS	$19,845,224	$19,902,782	-$57,558	-0.3	3,175,324	3,103,120	72,204	2.3	$3,258	$3,088	6.25	6.41
BUFFALO/ROCHESTER, NY - MULO	FZ FRUITS	$17,770,135	$17,761,046	$9,089	0.1	2,850,249	2,807,954	42,296	1.5	$3,662	$3,612	6.23	6.33
PITTSBURGH, PA - MULO	FZ FRUITS	$11,725,095	$11,909,357	-$184,262	-1.5	1,916,583	1,877,703	38,880	2.1	$2,299	$2,448	6.12	6.34
ALBANY, NY - MULO	FZ FRUITS	$9,165,160	$9,111,313	$53,847	0.6	1,423,524	1,433,680	-10,156	-0.7	$3,863	$3,669	6.44	6.36
SYRACUSE, NY - MULO	FZ FRUITS	$7,522,060	$7,562,833	-$40,773	-0.5	1,223,809	1,216,976	6,833	0.6	$3,687	$3,481	6.15	6.21
PROVIDENCE, RI - MULO	FZ FRUITS	$6,641,254	$6,582,639	$58,615	0.9	1,063,490	1,061,461	2,029	0.2	$3,665	$3,651	6.24	6.2

- New York is the largest market for Frozen Fruits, posting negative $ sales growth of -1.4% and slight increase in unit growth of 0.1%.
- New England, the 5th largest market, is responsible for a little less than $36.4M is sales, and is showing dollar growth of +2.2% and unit growth of 2.5%.
- Philadelphia, the 4th largest market, with $39M in dollar sales, is showing the highest decline in dollars at -4.6%.

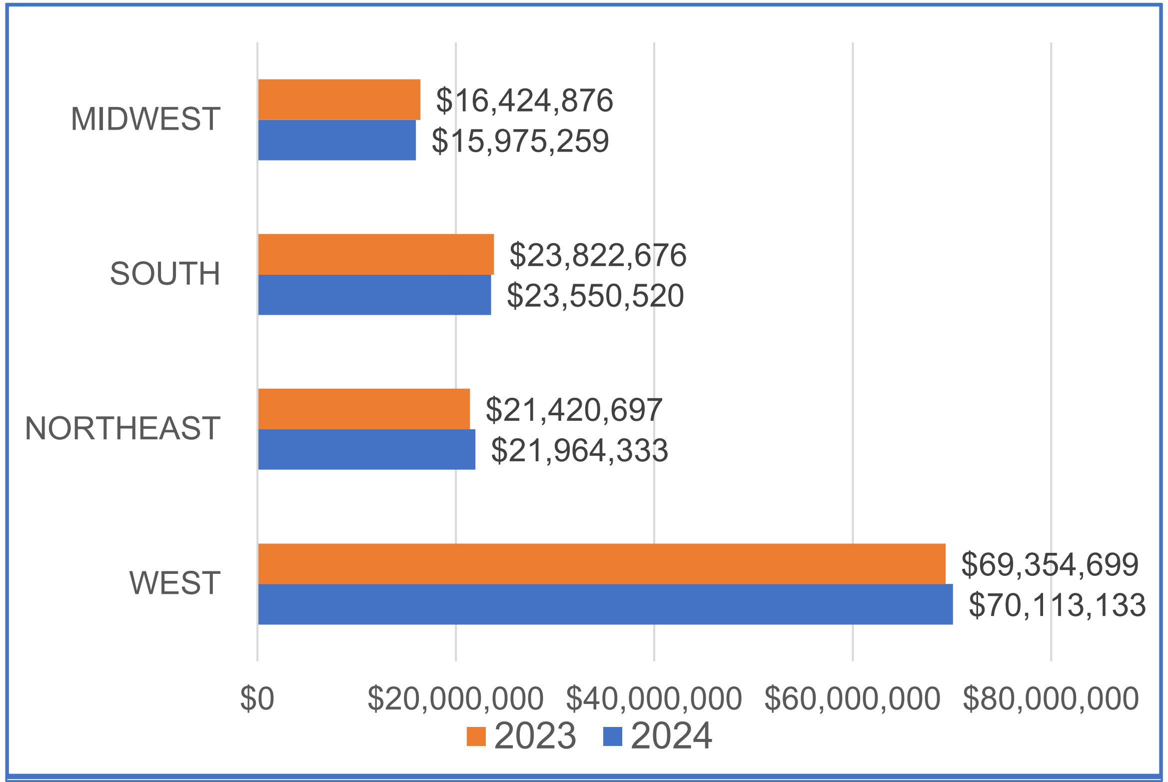
SPINS Satori – 52 weeks ending 8-11-24

Natural Channel: Frozen Fruit - Subcategory

Natural Channel Total US Dollars



Dollar Change vs Year Ago

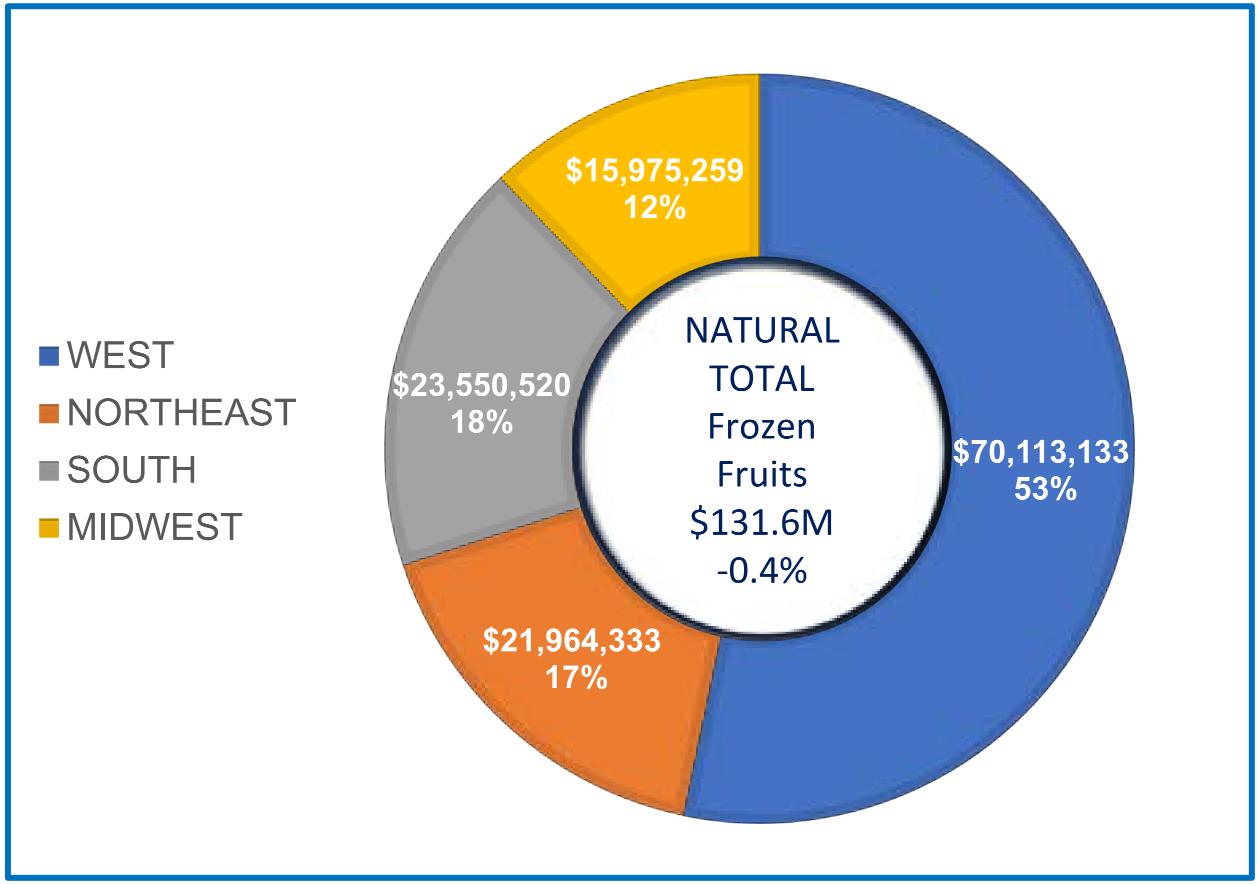


- Total Natural Channel $ volume for the Edamame & Soy subcategory is $7.8M and is up 14.9% over prior year.
- The West region is the largest $ volume region, followed by the South, Midwest, Northeast, respectively.
- All 4 census regions and Total US are posting sales that are greater than prior year.

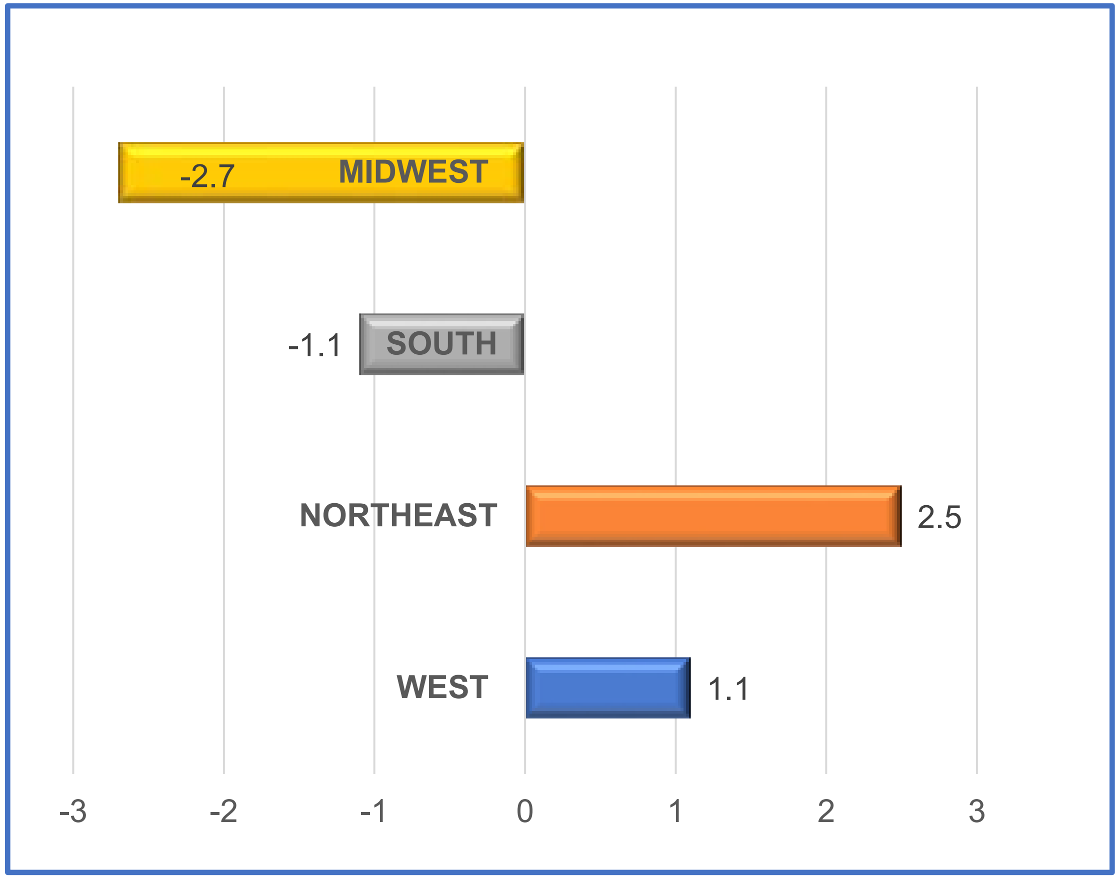
SPINS Satori – 52 weeks ending 8-11-24

Natural Channel: Frozen 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 53% of $ volume.
- The Northeast region, the 3rd largest market, is showing the highest $ growth at 2.5%.
- The 3 remaining regions, South, Midwest, and Northeast, are responsible for the remaining 47% of $ volume with respective growth/declines of -1.1%, -2.7% and +2.5%.

SPINS Satori – 52 weeks ending 8-11-24

Natural Channel: Frozen Fruits
Top 10 Brands Northeast Census Region

Description	Dollars	Dollars, Yago	Dollars +/- Chg, Yago	Dollars % Chg, Yago	Units	Units, Yago	Units +/- Chg, Yago	Units % Chg, Yago	Avg % ACV	TDP	Average Items Selling	ARP	ARP, Yago
FROZEN FRUITS & VEGETABLES	$58,771,535	$58,506,488	$265,047	0.5	11,984,415	12,403,834	-419,419	-3.4		14232		4.9	4.72
FZ FRUITS	$21,964,333	$21,420,697	$543,636	2.5	3,040,995	3,005,807	35,187	1.2		3613.3		7.22	7.13
WYMANS	$5,019,255	$4,653,209	$366,046	7.9	589,964	567,174	22,790	4	65	378.6	5.5	8.51	8.2
WOODSTOCK	$4,988,152	$4,826,167	$161,985	3.4	667,341	653,833	13,508	2.1	72.1	694.3	9.3	7.47	7.38
CASCADIAN FARM	$2,273,034	$2,530,017	-$256,983	-10.2	291,893	331,871	-39,977	-12	41	283.6	5.8	7.79	7.62
PRIVATE LABEL	$1,853,207	$2,143,581	-$290,374	-13.5	308,493	370,473	-61,981	-16.7	37.7	398	10.4	6.01	5.79
PRIVATE LABEL ORGANIC	$1,268,645	$1,039,101	$229,544	22.1	169,596	128,801	40,795	31.7	35.9	255.7	6.5	7.48	8.07
FIELD DAY	$978,609	$672,548	$306,062	45.5	103,443	72,628	30,815	42.4	18.2	39.6	2	9.46	9.26
DOLE	$833,062	$920,925	-$87,863	-9.5	141,476	158,877	-17,401	-11	36.1	289.8	7.9	5.89	5.8
EARTHBOUND FARM	$699,010	$695,554	$3,456	0.5	92,859	94,100	-1,241	-1.3	30.5	117.2	3.3	7.53	7.39
CADIA	$547,322	$300,051	$247,272	82.4	147,110	81,999	65,111	79.4	8.5	62.5	6.2	3.72	3.66
SEAL THE SEASONS	$435,159	$422,024	$13,134	3.1	36,035	37,302	-1,267	-3.4	21	95	3.8	12.08	11.31

- Frozen Fruit, the 3rd largest subcategory in the Natural Channel, is growing at 2.5% in $ volume to prior year in the Northeast, but is in decline in unit volume, at -3.4%.
- Maine's own Wyman's brand is the leading brand within this segment with $5.0M in Subcategory $ volume, growing +7.9%, with an increase in unit volume of -+4.0%.
- Private Label is showing a sharp decline in $ volume, -13.5%, and a more severe decline in unit volume at -16.7%.
- Private Label Organic is showing high dollar volume and unit volume growth at 22.1% and31.7%, respectively

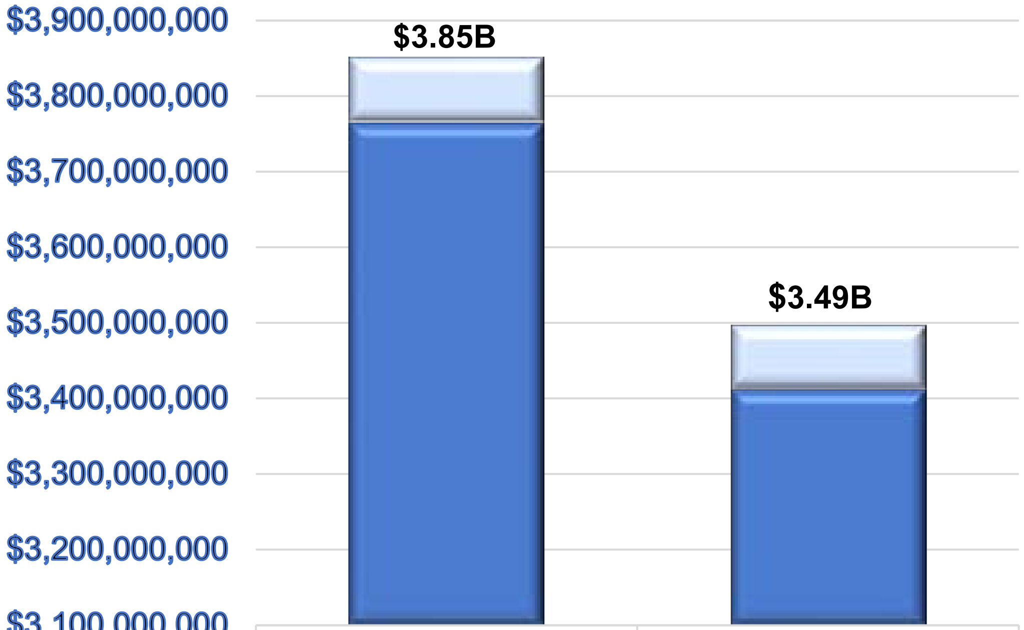
SPINS Satori – 52 weeks ending 8-11-24

Subcategory Performance
Frozen Potatoes.

SPINS Satori - 52 Weeks Ending 8-11-24

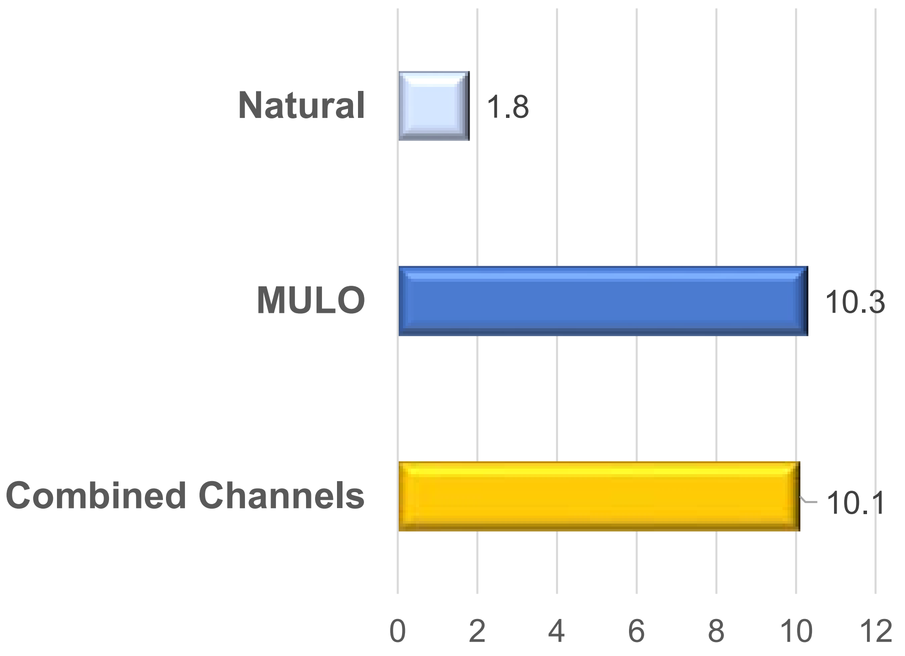
Total US Frozen Potatoes Subcategory

Total US Dollars



	2024	2023
NATURAL	$87,050,520	$85,537,319
MULO	$3,764,650,327	$3,412,341,211

% Dollar Change vs Year Ago

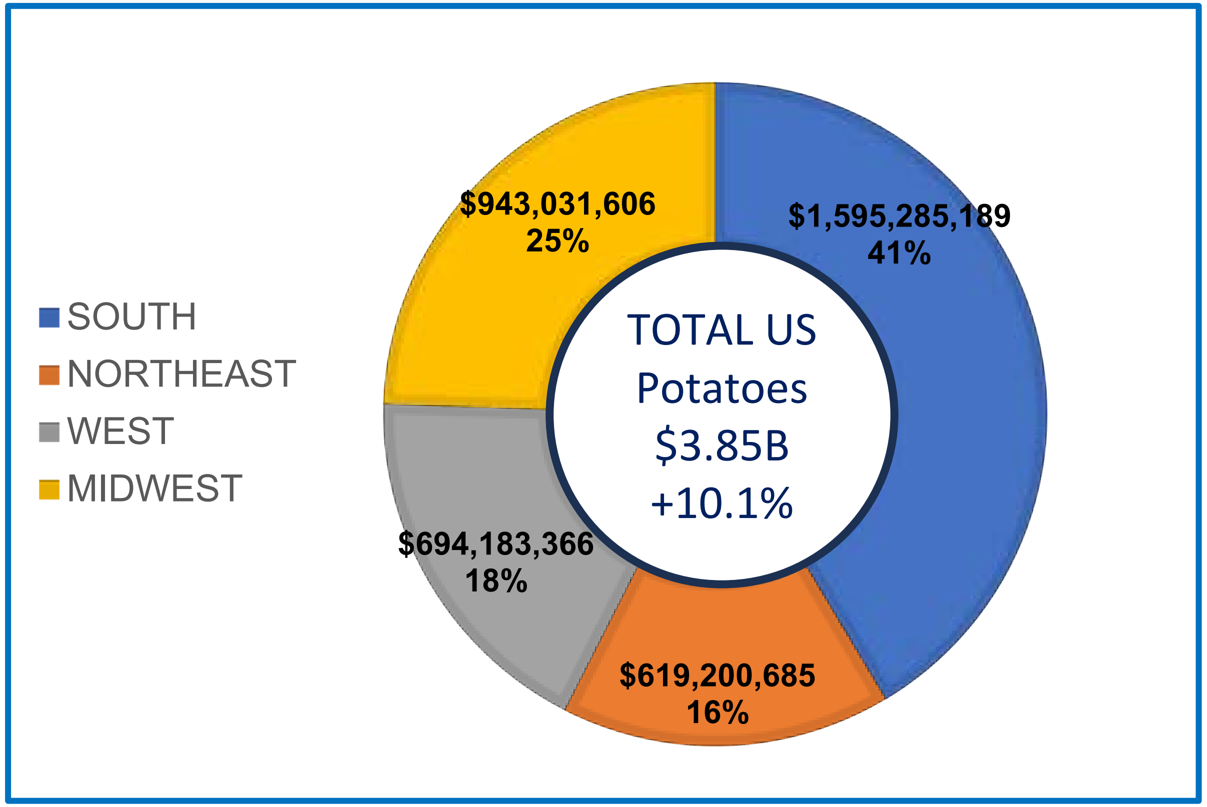


- Total US Frozen Potatoes is a $3.85B Category and is in high $ growth to prior year by +10.1%.
- Sales dollars were slightly up the Natural Channel (+1.8%) and higher growth in MULO (+10.3%).

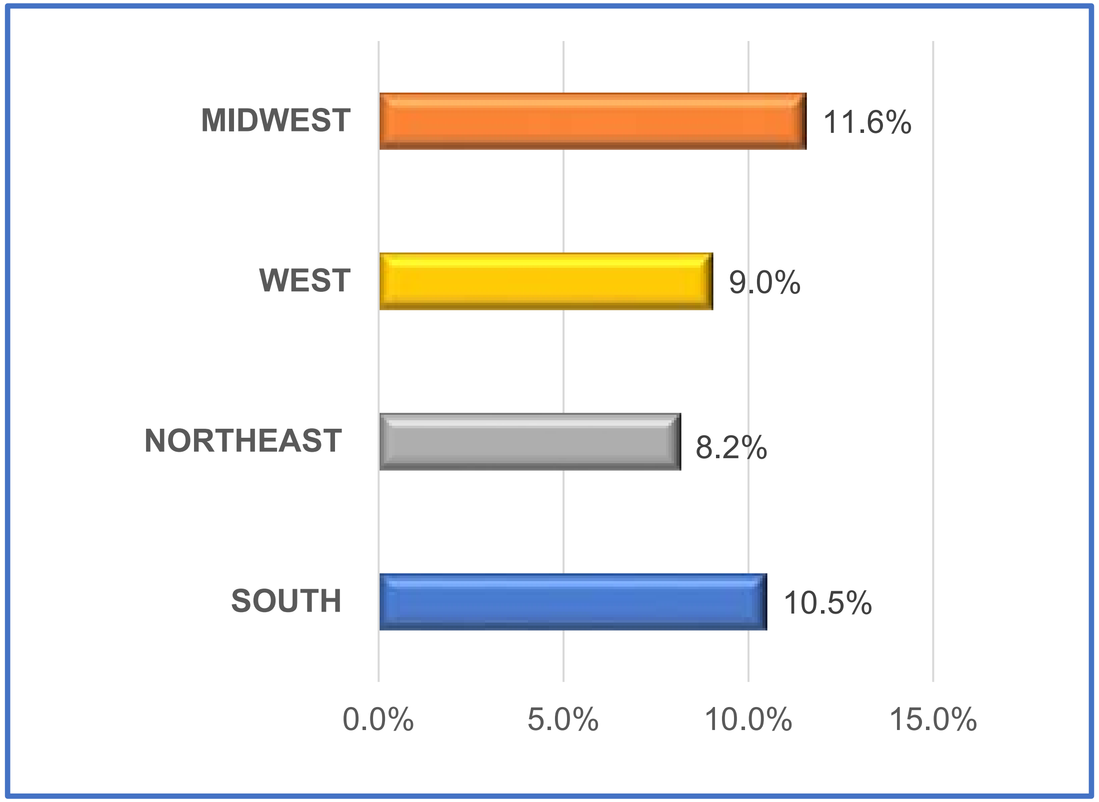
SPINS Satori – 52 weeks ending 8-11-24

Total US Frozen Potatoes Subcategory - By Region

Total Dollars and % Category Share by Region



% Dollar Change vs Year Ago

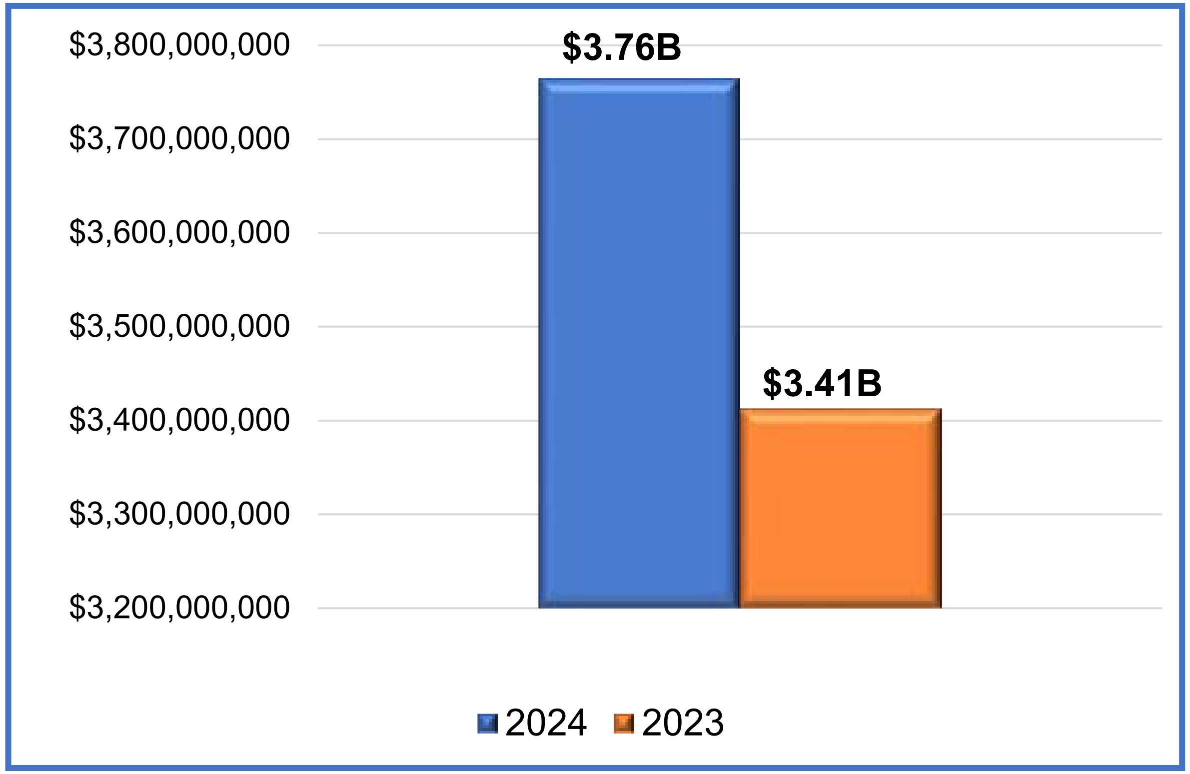


- The Frozen Potatoes subcategory has experienced the highest % growth over prior year of the 4 subcategories.
- The South region is the most highly developed region for this subcategory, responsible for 41% of $ volume with high growth at +10.5%.
- The 3 remaining regions, West, Northeast and Midwest, are responsible for the remaining 59$ of $ volume, all with high $ growth of 9.0%, 8.2% and 11.6%, respectively.

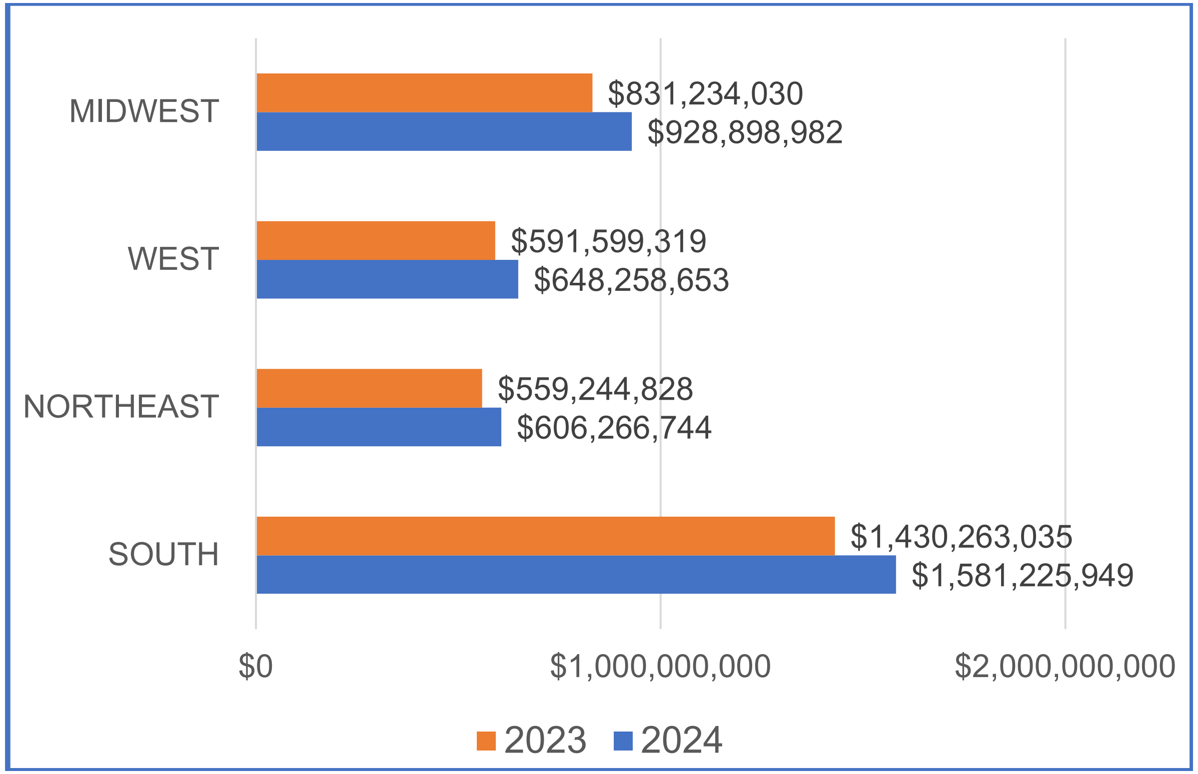
SPINS Satori – 52 weeks ending 8-11-24

MULO: Potatoes Subcategory

MULO Total US Dollars



Dollar Change vs Year Ago

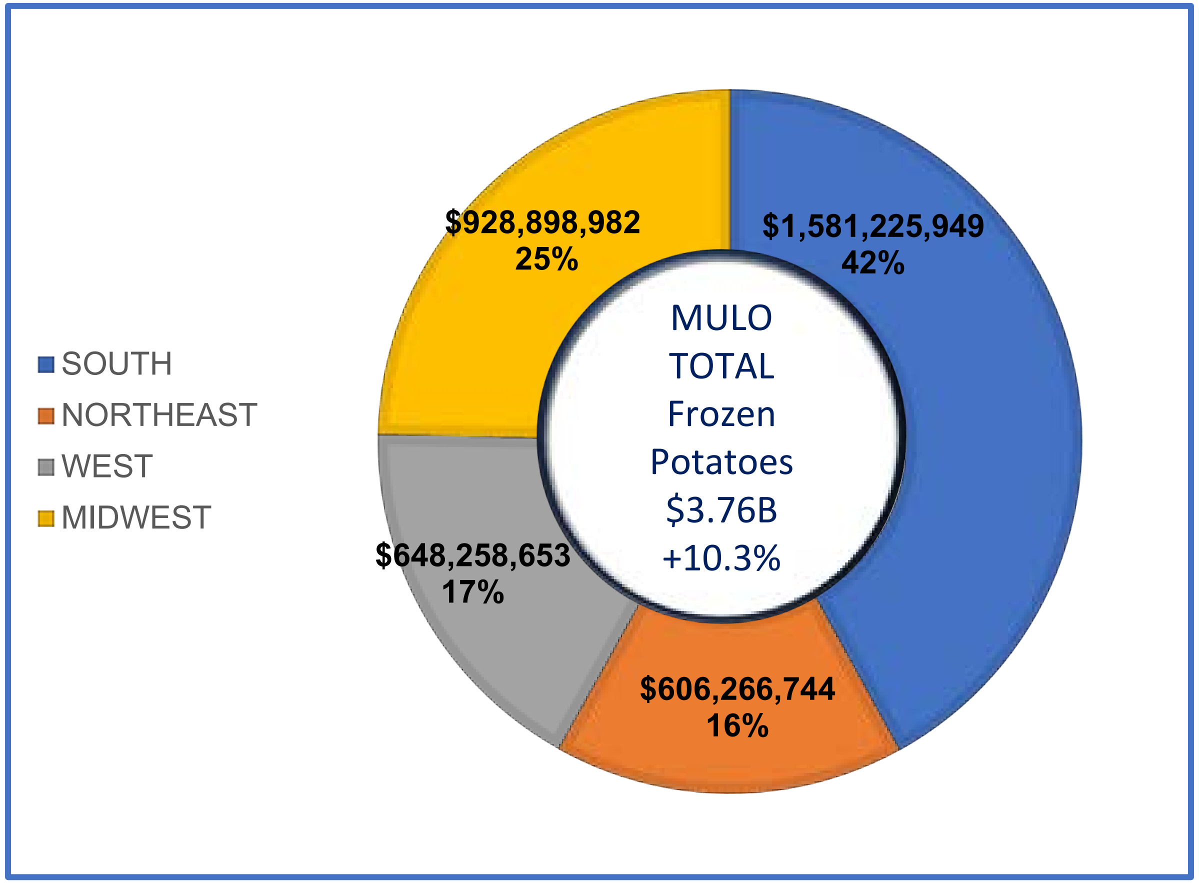


- Total US MULO $ volume for Frozen Potatoes is $3.76B and grew 10.3% over prior year.
- The South region is by far the largest $ volume region, followed by Midwest, West and Northeast, respectively.
- All 4 census regions and Total US are posting sales that are greater than prior year.

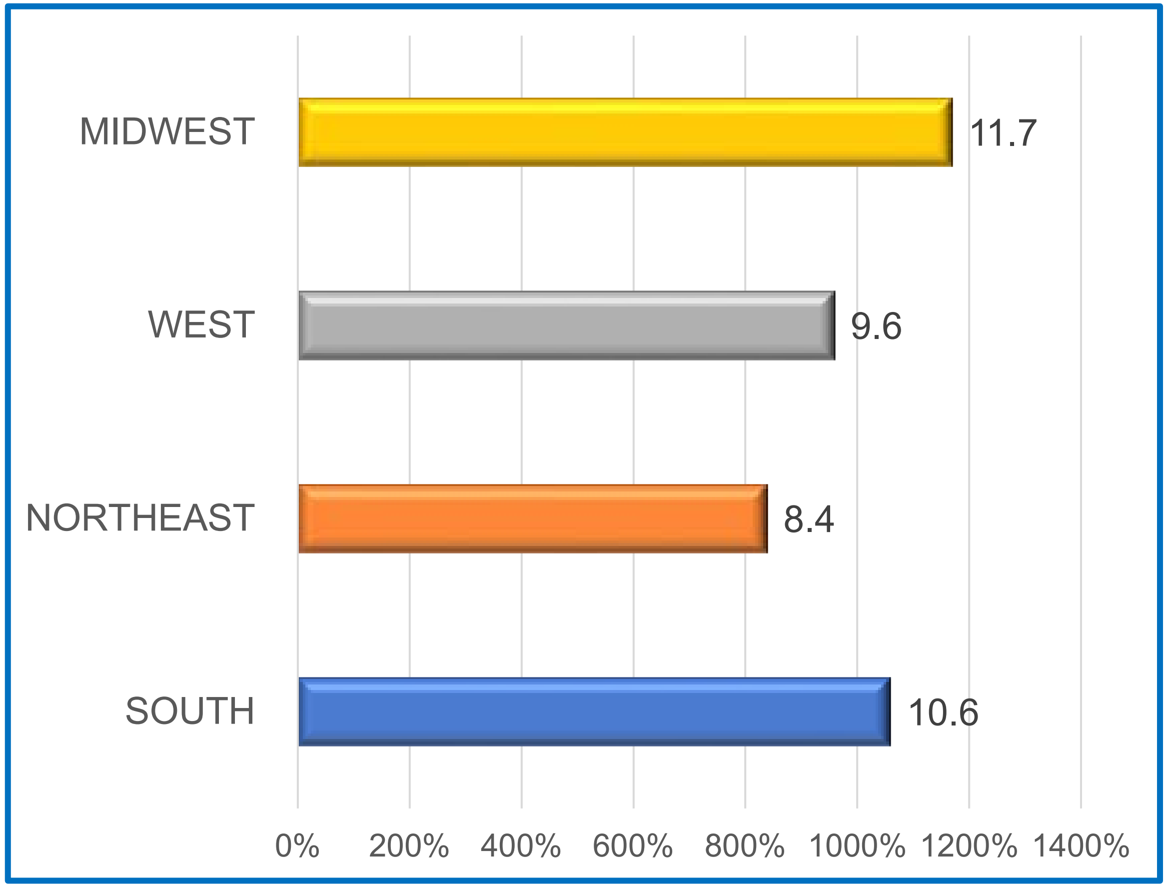
SPINS Satori – 52 weeks ending 8-11-24

MULO: Frozen Potatoes 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 sub-category, responsible for 42% of $ volume with growth of 10.6%
- The 3 remaining regions, West, Northeast and Midwest, are responsible for the remaining 58% of $ volume with respective growth of 9.6%, 8.4%, and 11.7%.

SPINS Satori – 52 weeks ending 8-11-24

MULO: Potatoes
Top 10 Brands Northeast Census Region

Description	Dollars	Dollars, Yago	Dollars +/- Chg, Yago	Dollars % Chg, Yago	Units	Units, Yago	Units +/- Chg, Yago	Units % Chg, Yago	Avg % ACV	TDP	Average Items Selling	ARP	ARP, Yago
FROZEN FRUITS & VEGETABLES	$1,701,494,847	$1,674,153,879	$27,340,968	1.6	507,858,519	514,547,064	-6,688,545	-1.3		20337.9		3.35	3.25
FZ POTATOES	$606,266,744	$559,244,828	$47,021,915	8.4	131,792,252	129,425,850	2,366,402	1.8		4818.8		4.6	4.32
PRIVATE LABEL	$180,760,579	$158,753,850	$22,006,730	13.9	46,830,839	45,673,655	1,157,184	2.5	82.8	927.2	10.9	3.86	3.48
ORE-IDA	$167,300,585	$145,141,846	$22,158,739	15.3	31,658,218	29,349,091	2,309,127	7.9	89.2	1144.6	12.5	5.28	4.95
MCCAIN	$59,066,000	$55,992,016	$3,073,984	5.5	14,926,495	14,432,214	494,281	3.4	71.6	644.2	8.8	3.96	3.88
GROWN IN IDAHO	$39,650,687	$41,817,306	-$2,166,619	-5.2	7,939,686	8,665,926	-726,240	-8.4	58.9	284.1	4.6	4.99	4.83
ALEXIA LAMB WESTON	$34,807,785	$38,717,887	-$3,910,102	-10.1	5,830,885	6,789,122	-958,237	-14.1	74.3	402.4	5.3	5.97	5.7
CHECKERS	$25,033,188	$23,598,966	$1,434,222	6.1	4,410,613	4,437,541	-26,927	-0.6	73.5	117.2	1.5	5.68	5.32
ARBYS	$16,434,007	$15,179,457	$1,254,550	8.3	2,987,320	2,906,968	80,352	2.8	72.5	130.9	1.7	5.5	5.22
TGI FRIDAYS	$14,503,790	$13,715,191	$788,599	5.7	1,716,713	1,695,933	20,780	1.2	70.5	170	2.3	8.45	8.09
CAVENDISH FARMS	$12,824,377	$11,875,989	$948,388	8	2,788,060	2,686,053	102,008	3.8	27.6	46.1	1.5	4.6	4.42
NATHANS	$11,759,856	$13,564,847	-$1,804,990	-13.3	2,171,825	2,656,168	-484,343	-18.2	61.3	65	1	5.41	5.11

- The MULO Frozen Potatoes subcategory is fast growing in $ volume, at 8.4% over prior year in the Northeast, and is positive in unit volume, +1.8%.
- Private Label is the #1 brand in the subcategory and is far exceeding the subcategory growth at 13.9% in $ volume and 2.5% in unit volume.
- Ore-Ida, is the largest mfg. brand and has the highest $ growth in the subcategory at +15.3% and unit growth of 7.9% .
- Bob’s Red Mill, another specialty brand, ranks 5th among the Top 10 Northeast brands and is showing growth in $ volume, but a slight decline in unit volume.

SPINS Satori – 52 weeks ending 8-11-24

MULO: Frozen Potatoes
Top Markets Northeast Census Region

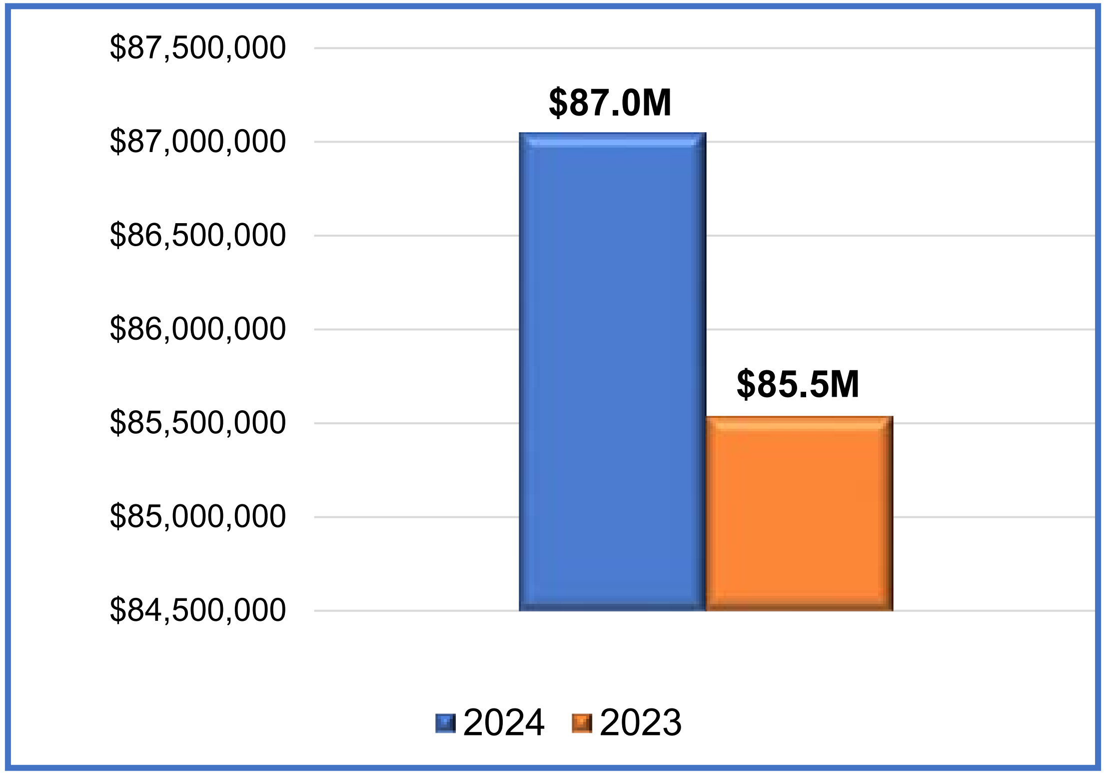
Geography	Description	Dollars	Dollars, Yago	Dollars +/- Chg, Yago	Dollars % Chg, Yago	Units	Units, Yago	Units +/- Chg, Yago	Units % Chg, Yago	TDP	TDP, Yago	ARP	ARP, Yago
NEW YORK, NY - MULO	FZ POTATOES	$145,226,028	$138,954,255	$6,271,773	4.5	29,182,060	29,027,423	154,638	0.5	$4,422	$4,238	4.98	4.79
BALTIMORE, MD/WASHINGTON D.C. - MULO	FZ POTATOES	$88,413,928	$83,118,579	$5,295,350	6.4	18,631,998	18,669,762	-37,764	-0.2	$4,814	$4,584	4.75	4.45
PHILADELPHIA, PA - MULO	FZ POTATOES	$75,787,515	$68,576,681	$7,210,834	10.5	16,705,629	16,124,977	580,652	3.6	$5,111	$4,804	4.54	4.25
HARRISBURG/SCRANTON, PA - MULO	FZ POTATOES	$61,759,779	$55,626,084	$6,133,696	11	14,138,963	13,822,084	316,879	2.3	$5,460	$5,307	4.37	4.02
BOSTON, MA - MULO	FZ POTATOES	$56,182,942	$51,544,262	$4,638,681	9	12,239,240	12,024,887	214,353	1.8	$5,179	$4,776	4.59	4.29
NEW ENGLAND - MULO	FZ POTATOES	$50,005,961	$44,196,385	$5,809,577	13.1	10,936,367	10,550,088	386,278	3.7	$5,071	$4,791	4.57	4.19
RICHMOND/NORFOLK, VA - MULO	FZ POTATOES	$48,082,293	$43,921,737	$4,160,556	9.5	10,536,263	10,399,401	136,862	1.3	$4,623	$4,531	4.56	4.22
HARTFORD, CT/SPRINGFIELD, MA - MULO	FZ POTATOES	$37,702,867	$34,946,746	$2,756,121	7.9	8,129,850	7,898,842	231,008	2.9	$4,701	$4,334	4.64	4.42
PITTSBURGH, PA - MULO	FZ POTATOES	$35,109,897	$33,143,672	$1,966,225	5.9	8,171,895	8,164,363	7,532	0.1	$4,790	$5,189	4.3	4.06
BUFFALO/ROCHESTER, NY - MULO	FZ POTATOES	$34,806,739	$32,062,545	$2,744,194	8.6	7,857,779	7,816,196	41,583	0.5	$5,075	$5,125	4.43	4.1
SYRACUSE, NY - MULO	FZ POTATOES	$17,071,257	$15,645,910	$1,425,347	9.1	3,884,616	3,877,452	7,164	0.2	$4,748	$4,805	4.39	4.04
ALBANY, NY - MULO	FZ POTATOES	$16,853,624	$15,009,135	$1,844,489	12.3	3,619,739	3,569,978	49,761	1.4	$4,674	$4,610	4.66	4.2
PROVIDENCE, RI - MULO	FZ POTATOES	$9,981,091	$9,085,727	$895,363	9.9	2,141,784	2,067,871	73,913	3.6	$4,824	$4,543	4.66	4.39

- New York is the largest market for Potatoes, posting positive$ sales growth of +4.5%; the most modest growth for all markets, and is showing a slight increase in unit growth of 0.5%.
- New England, the 6th largest market responsible for $50M is sales, is showing dollar growth of 13.1% and unit growth of 3.7%; the highest in both dollar and unit growth of all markets.

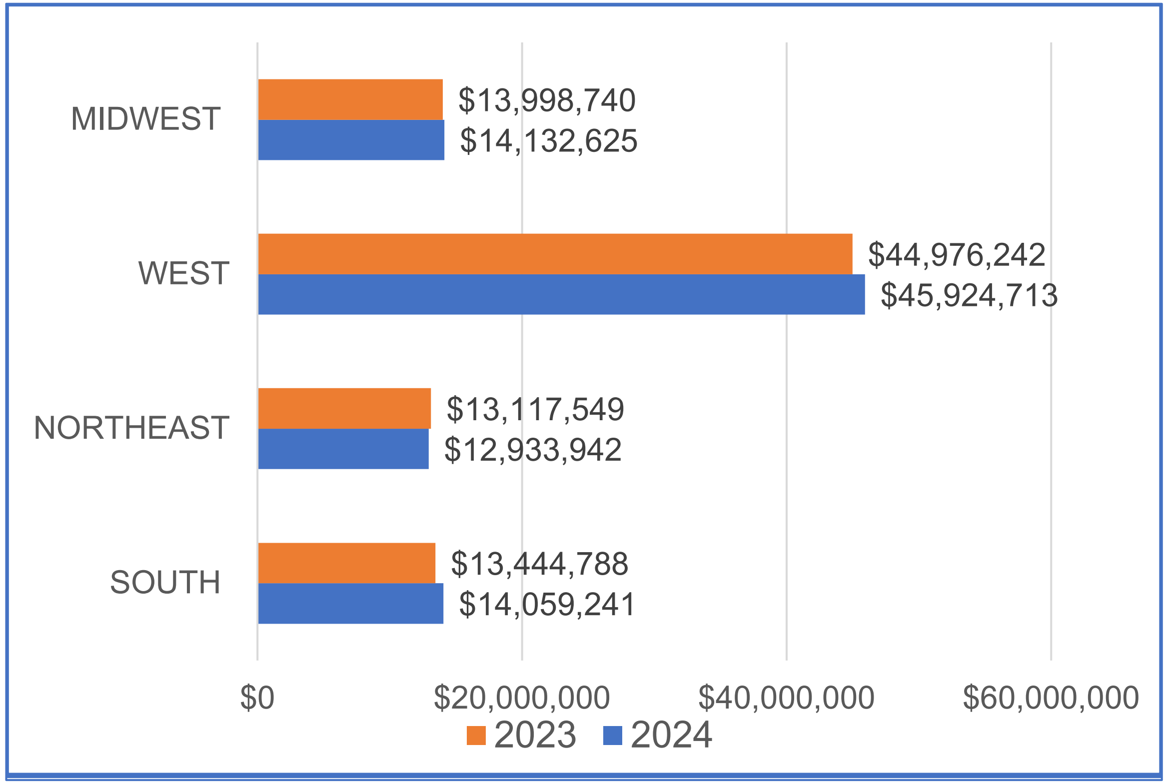
SPINS Satori – 52 weeks ending 12-31-23

Natural Channel: Frozen Potatoes Subcategory

Natural Channel Total US Dollars



Dollar Change vs Year Ago

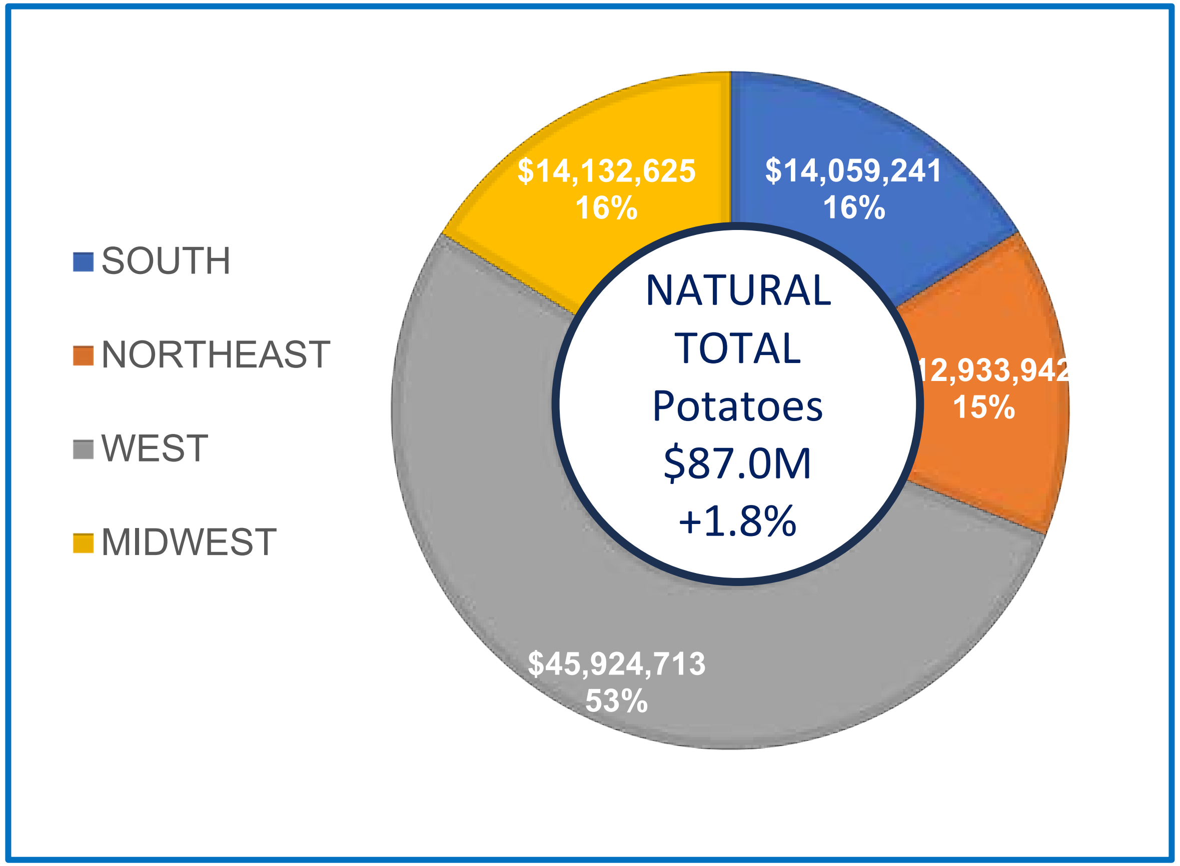


- Total Natural $ volume for the Frozen Potatoes subcategory is $87.0M and grew 1.8% over prior year.
- The South region is the largest $ volume region, followed by the Northeast, Midwest and South, respectively.
- All 4 census regions, with exception of the Northeast (-1.4%), and Total US are posting sales that are greater than prior year.

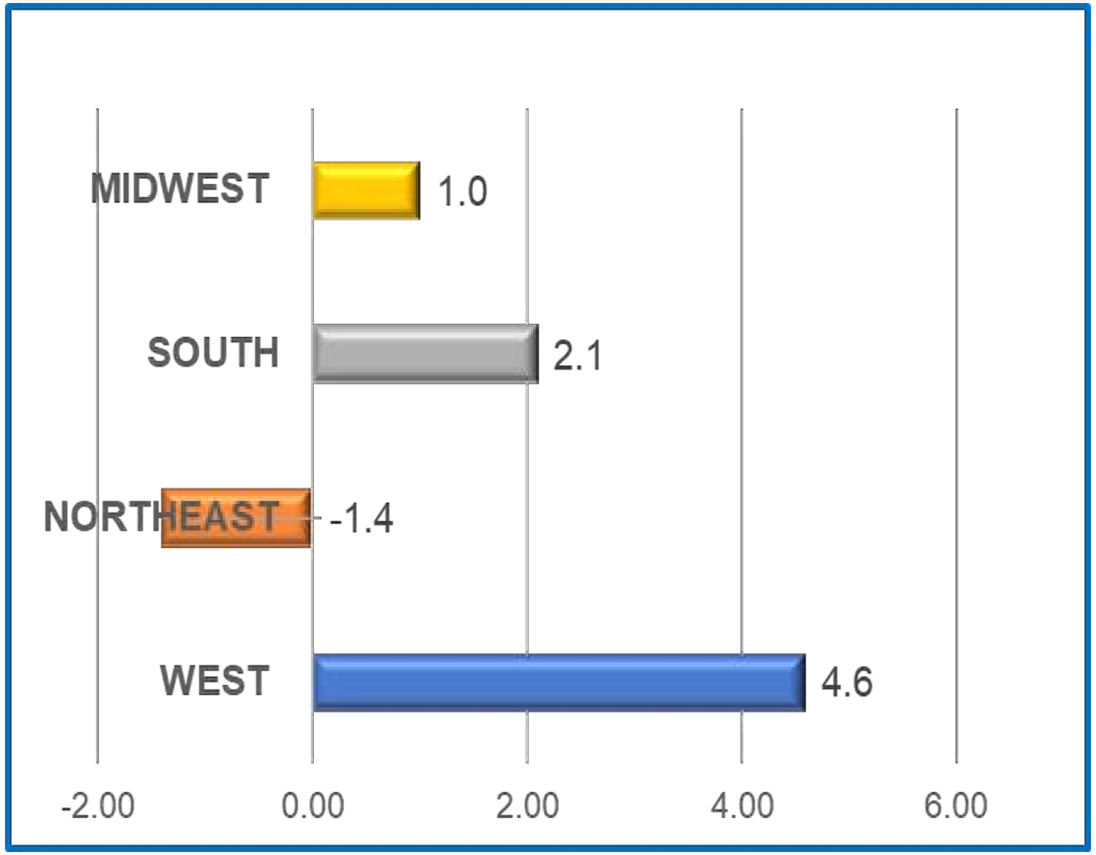
SPINS Satori – 52 weeks ending 8-11-24

Natural Channel: Frozen Potatoes 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 53% of $ volume with growth of 1.0%.
- The 3 remaining regions, South, Northeast and Midwest, are responsible for the remaining 47% of $ volume with respective growth/decline of 2.1%, -1.4% and 1.0%.

SPINS Satori – 52 weeks ending 8-11-24

Natural Channel: Frozen Potatoes
Top 10 Brands Northeast Census Region

Description	Dollars	Dollars, Yago	Dollars +/- Chg, Yago	Dollars % Chg, Yago	Units	Units, Yago	Units +/- Chg, Yago	Units % Chg, Yago	Avg % ACV	TDP	Average Items Selling	ARP	ARP, Yago
FROZEN FRUITS & VEGETABLES	$58,771,535	$58,506,488	$265,047	0.5	11,984,415	12,403,834	-419,419	-3.4		14232		4.9	4.72
FZ POTATOES	$12,933,942	$13,117,549	-$183,607	-1.4	2,206,878	2,369,970	-163,092	-6.9		2738.3		5.86	5.53
ALEXIA LAMB WESTON	$5,096,971	$5,542,566	-$445,595	-8.0	775,493	847,743	-72,250	-8.5	95.6	829.6	8.5	6.57	6.54
ORE-IDA	$2,981,967	$2,768,005	$213,962	7.7	529,440	571,120	-41,680	-7.3	60	650.5	10.6	5.63	4.85
MCCAIN	$1,180,098	$1,199,624	-$19,525	-1.6	236,578	248,195	-11,616	-4.7	53	369	6.7	4.99	4.83
CASCADIAN FARM	$883,440	$920,615	-$37,175	-4.0	178,040	192,052	-14,012	-7.3	41.7	138.7	2.7	4.96	4.79
GROWN IN IDAHO	$415,789	$463,854	-$48,065	-10.4	65,648	80,334	-14,686	-18.3	23.6	101.7	3.6	6.33	5.77
STRONG ROOTS	$388,496	$354,550	$33,946	9.6	60,398	59,211	1,188	2	44.5	142.5	2.7	6.43	5.99
NATHANS	$379,862	$440,659	-$60,796	-13.8	60,510	78,048	-17,538	-22.5	43.2	46.7	1	6.28	5.65
CAVENDISH FARMS	$371,471	$432,859	-$61,387	-14.2	73,420	91,658	-18,238	-19.9	32.7	43.8	1.2	5.06	4.72
ROOTS FARM FRESH	$132,099	$37,615	$94,484	251.2	15,856	4,732	11,124	235.1	15.8	48	2.4	8.33	7.95
CHECKERS	$128,007	$119,365	$8,642	7.2	21,186	20,908	278	1.3	14.1	18.6	1.1	6.04	5.71

- The Natural Channel Frozen Potatoes subcategory is in decline in $ volume, at -1.0% over 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 -8% over 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 prior year; unit volume, however, is in decline -7.3%.
- McCain, the #3 brand Frozen Potato, is also in decline in $ Volume at -2% % to prior year, and is also declining in unit volume at 4.7% over prior year.

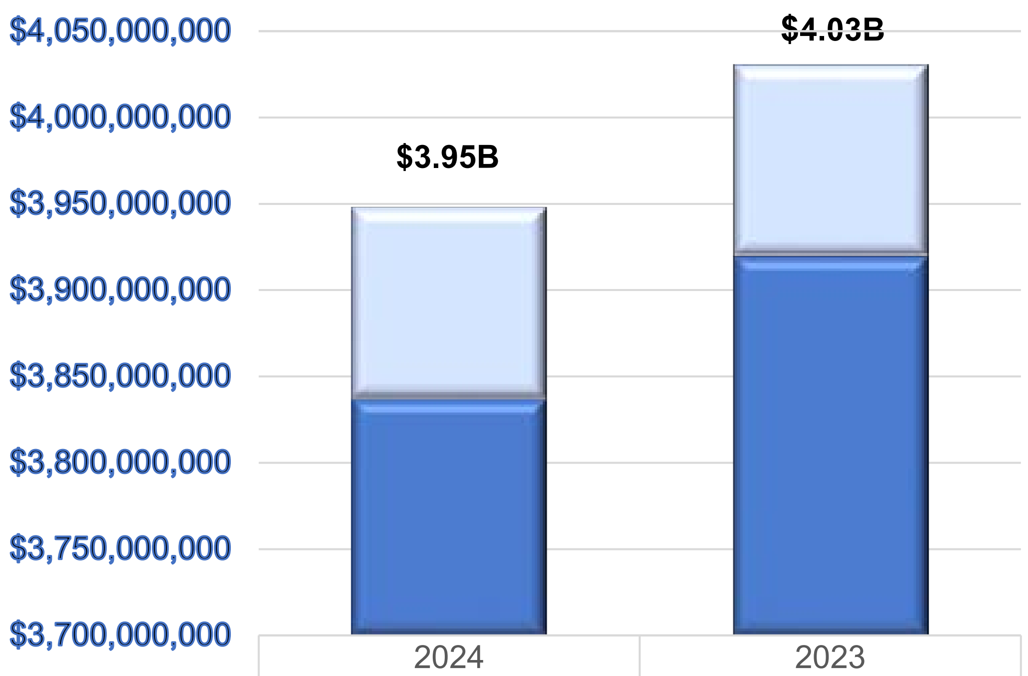
SPINS Satori – 52 weeks ending 8-11-24

Subcategory Performance
Frozen Vegetables

SPINS Satori - 52 Weeks Ending 8-11-24

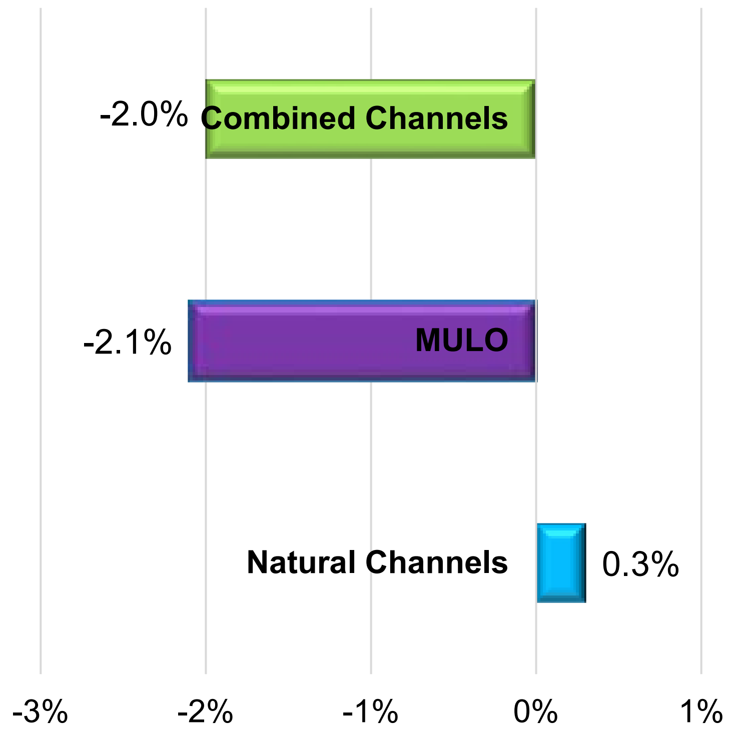
Total US Frozen Vegetable Subcategory

Total US Dollars



	2024	2023
NATURAL	$111,176,023	$110,845,802
MULO	$3,837,098,326	$3,919,726,353

% Dollar Change vs Year Ago

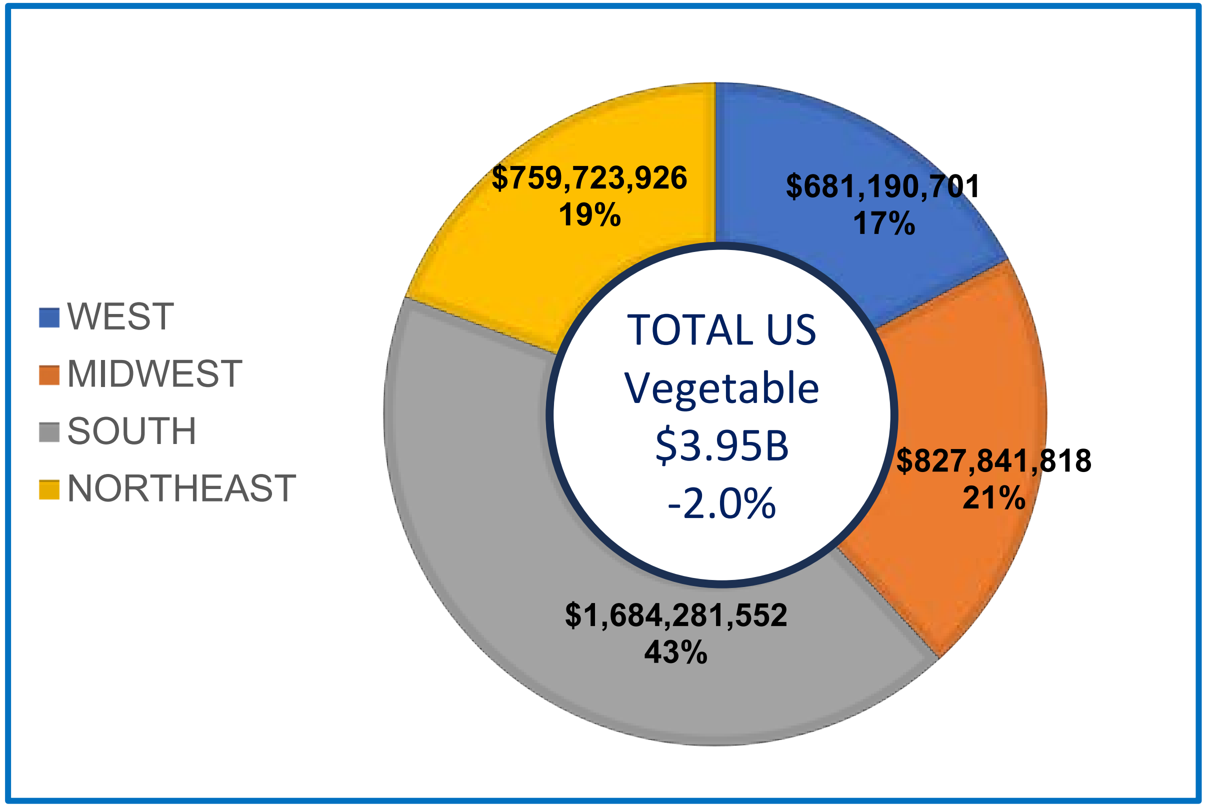


- The Total US Frozen Vegetables is a $3.95B subcategory and is in decline to prior year by -2.0%.
- Sales dollars were up slightly in the Natural Channel (+0.3%) and MULO was in decline (-2.1%).
- As in most categories, MULO represents the majority of category sales.

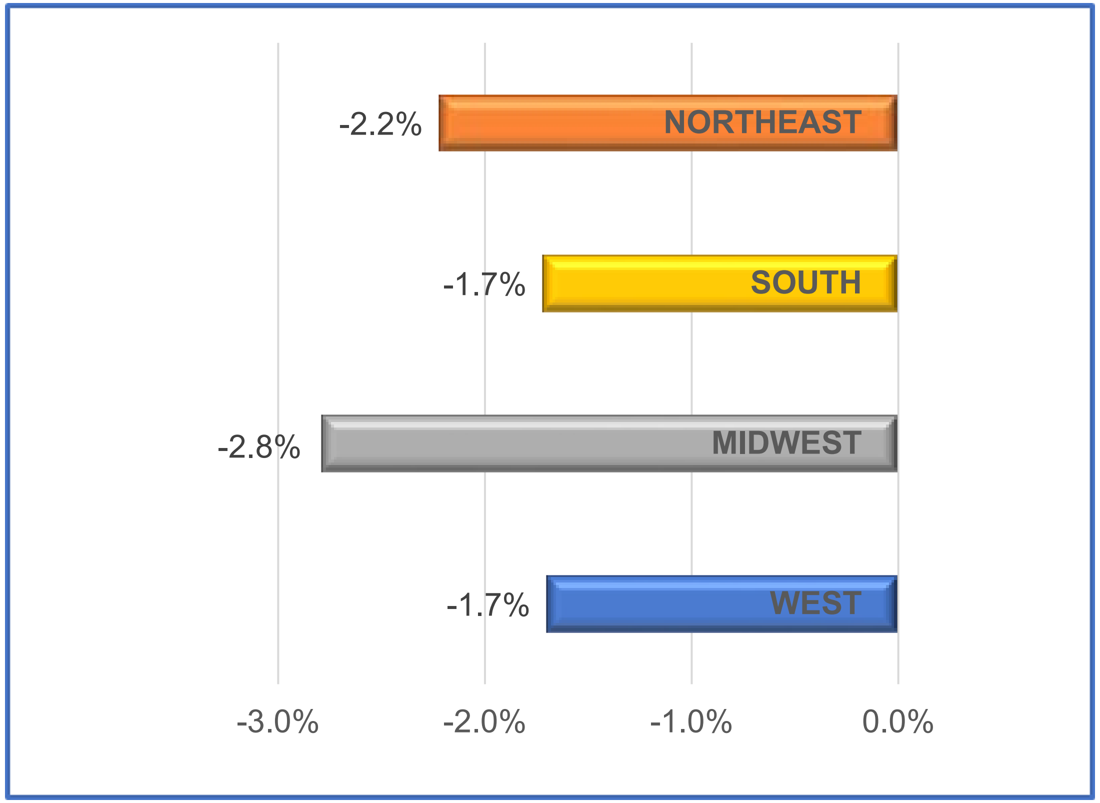
SPINS Satori – 52 weeks ending 8-11-24

Total US Frozen Vegetables Subcategory - By Region

Total Dollars and % Category Share by Region



% Dollar Change vs Year Ago

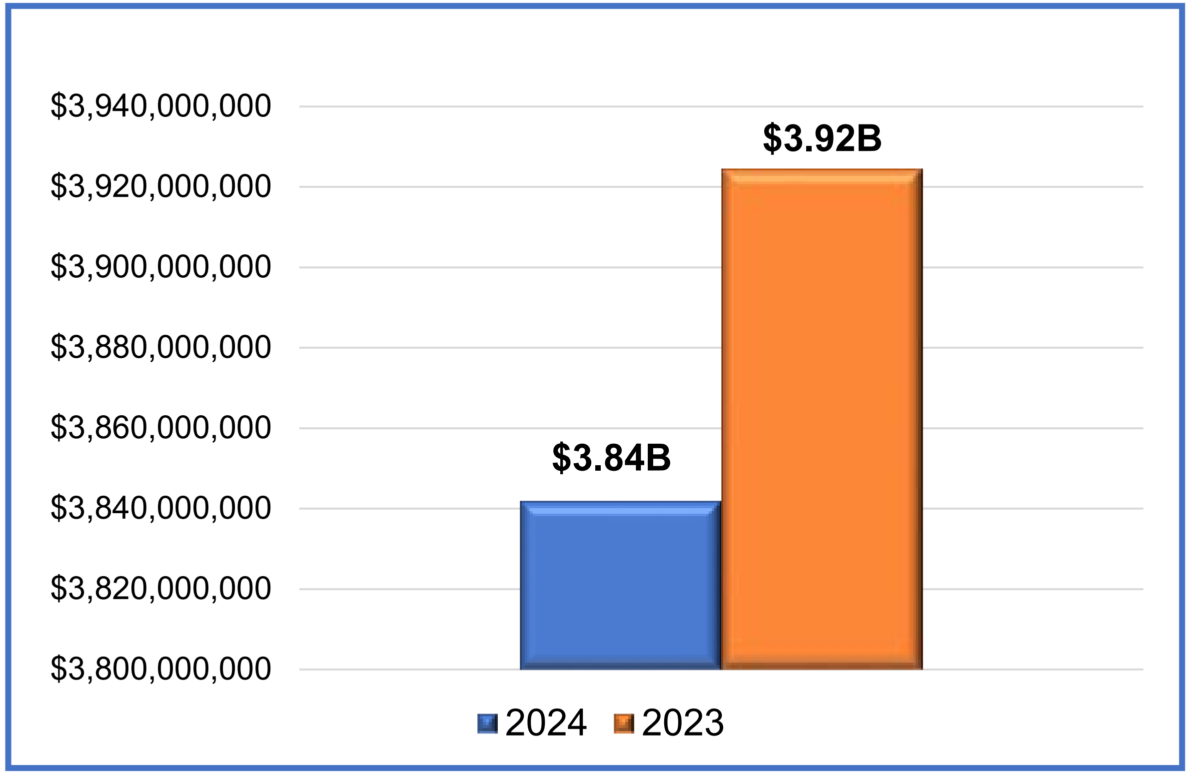


- The South region is the most highly developed region for this subcategory, responsible for 43% of $ volume in decline at -1.7%
- The 3 remaining regions, Northeast, West and Midwest, are responsible for the remaining $ volume with respective declines of 2.2%, -1.7% and -2.8%.

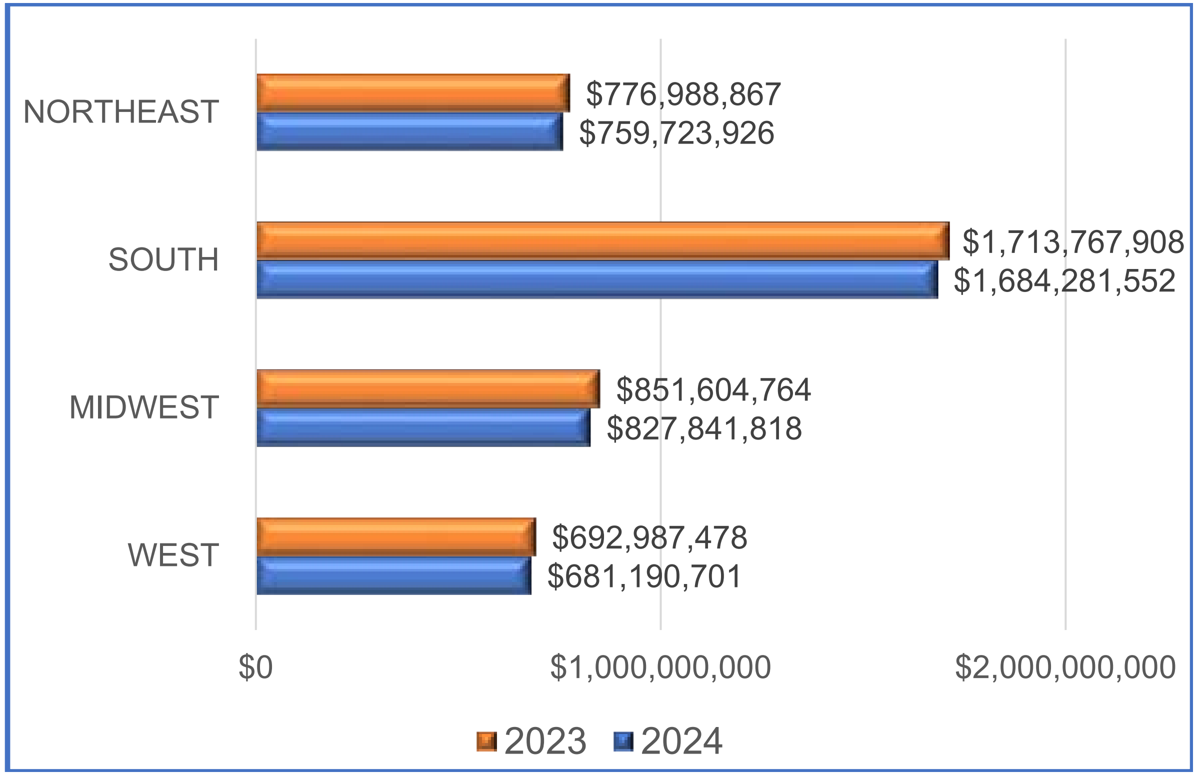
SPINS Satori – 52 weeks ending 8-11-24

MULO: Frozen Vegetables Subcategory

MULO Total US Dollars



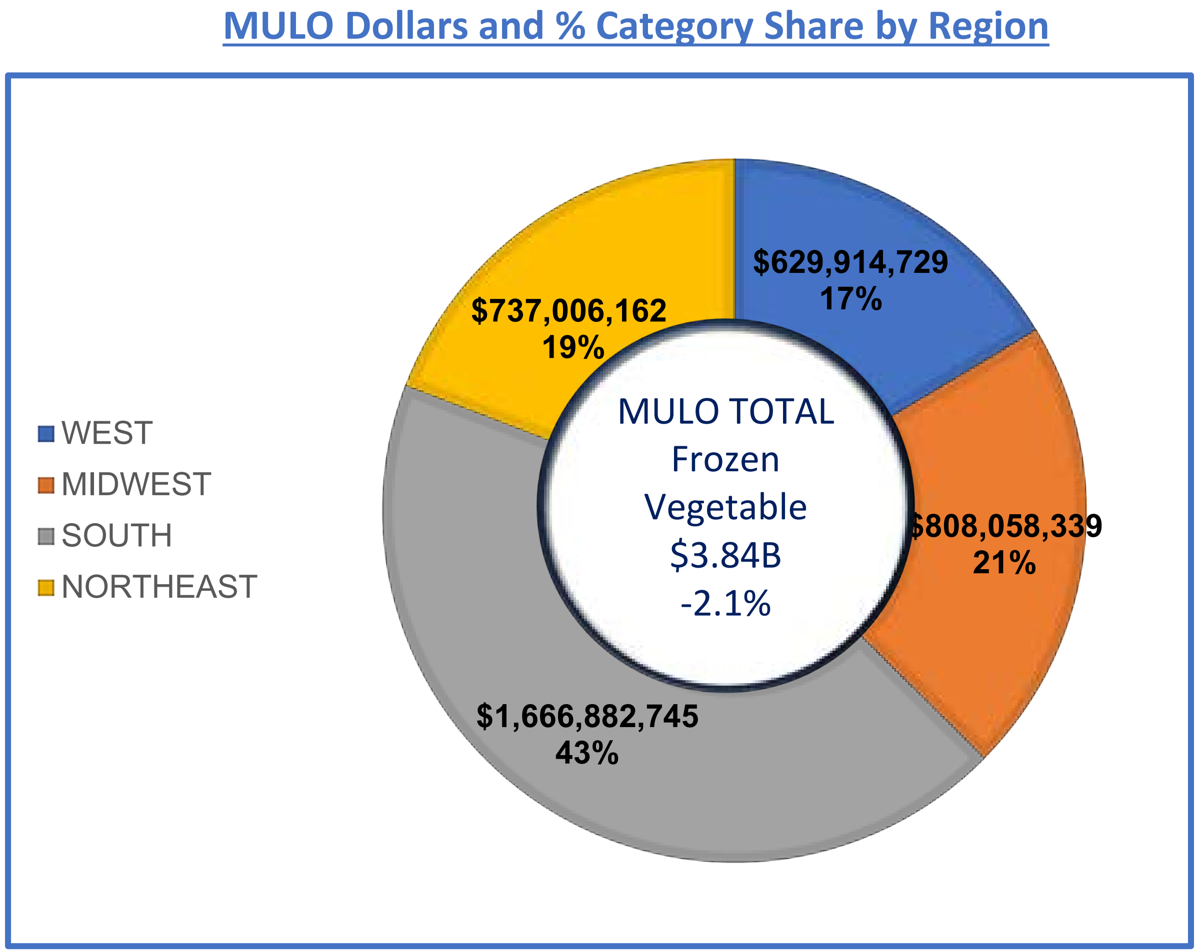
Dollar Change vs Year Ago

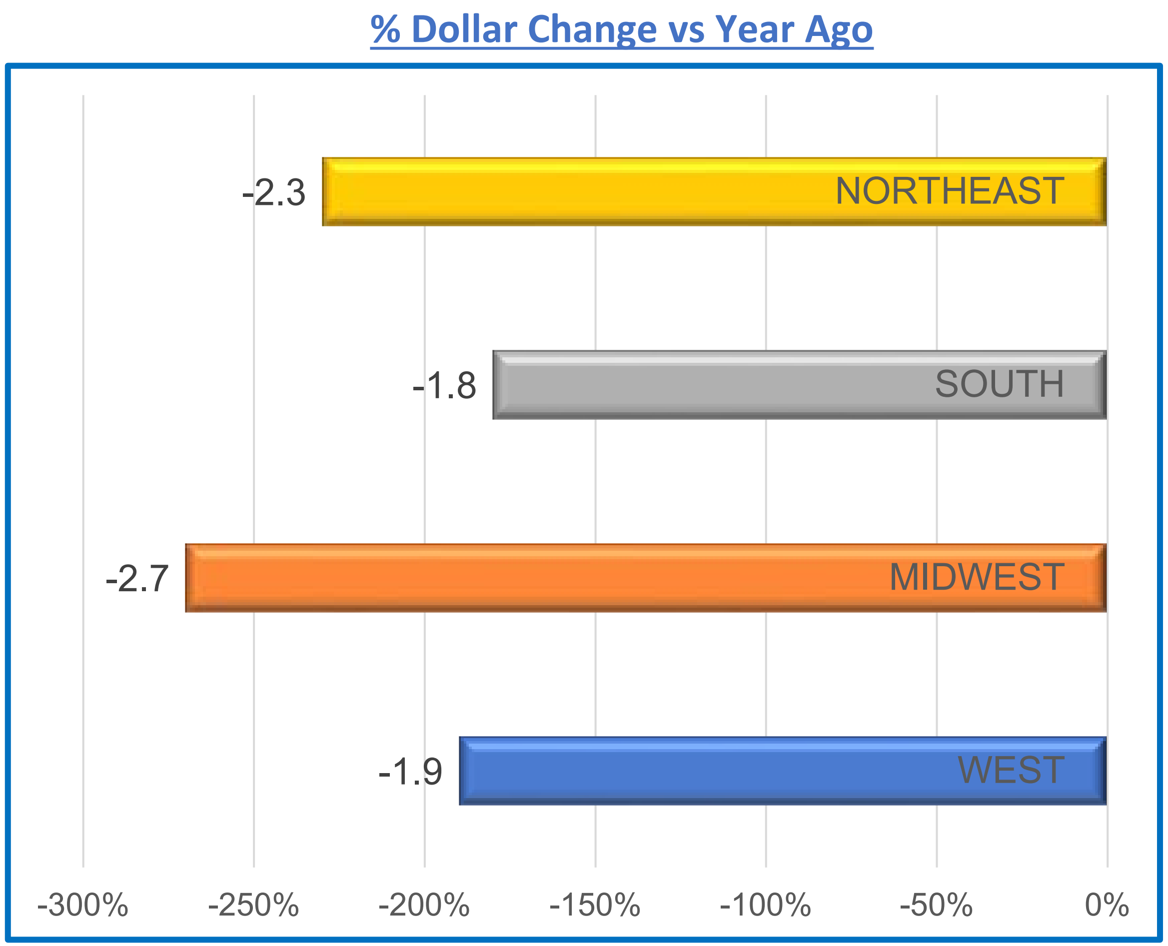


- Total US MULO $ volume for the Frozen Vegetables subcategory is $3.84B and grew -2.1% over prior year.
- The South region is the largest $ volume region, followed by Midwest, Northeast and West, respectively.
- All 4 census regions and Total US are posting negative dollar sales to prior year.

SPINS Satori – 52 weeks ending 8-11-24

MULO: Frozen Vegetables - By Region





- The South region is the most highly developed region for this subcategory, responsible for 43% of $ volume, and is showing decline in $ volume growth at -1.8% to prior year.
- The 3 remaining regions, Northeast, West and Midwest, are responsible for the remaining 57% of $ volume with respective declines in $ sales of -2.3%, -1.9% and -2.7%.

SPINS Satori – 52 weeks ending 8-11-24

MULO: Frozen Vegetables - Top 10 Brands Northeast Census Region

Description	Dollars	Dollars, Yago	Dollars +/- Chg, Yago	Dollars % Chg, Yago	Units	Units, Yago	Units +/- Chg, Yago	Units % Chg, Yago	Avg % ACV	TDP	Average Items Selling	ARP	ARP, Yago
FROZEN FRUITS & VEGETABLES	$1,701,494,847	$1,674,153,879	$27,340,968	1.6	507,858,519	514,547,064	-6,688,545	-1.3		20337.9		3.35	3.25
FZ VEGETABLES	$737,006,162	$754,119,428	-$17,113,267	-2.3	315,322,354	324,315,555	-8,993,201	-2.8		11716.4		2.34	2.33
PRIVATE LABEL	$333,471,464	$328,851,603	$4,619,861	1.4	176,197,889	174,965,167	1,232,722	0.7	91.4	3305.5	35.5	1.89	1.88
BIRDS EYE	$169,477,198	$180,573,505	-$11,096,307	-6.1	64,996,983	68,567,195	-3,570,213	-5.2	86.5	3132.5	35.9	2.61	2.63
GREEN GIANT	$55,681,923	$65,075,100	-$9,393,177	-14.4	23,122,404	26,591,190	-3,468,786	-13	73.4	1588	21.3	2.41	2.45
PRIVATE LABEL ORGANIC	$32,591,123	$30,439,814	$2,151,309	7.1	10,131,189	9,536,828	594,362	6.2	72.9	466.3	6.1	3.22	3.19
GOYA	$29,158,458	$27,401,672	$1,756,786	6.4	6,997,421	6,976,914	20,506	0.3	54.4	481.4	8.5	4.17	3.93
HANOVER	$28,137,435	$33,573,497	-$5,436,062	-16.2	11,106,772	13,693,538	-2,586,765	-18.9	40.2	679.2	16.2	2.53	2.45
PICTSWEET	$17,246,343	$19,521,892	-$2,275,549	-11.7	6,007,963	6,932,802	-924,839	-13.3	52.4	712.2	13.1	2.87	2.82
LA FE	$13,496,183	$12,839,138	$657,045	5.1	3,545,911	3,595,179	-49,268	-1.4	13.4	183.5	11.7	3.81	3.57
NATHANS	$8,662,701	$9,341,859	-$679,159	-7.3	1,629,145	1,885,765	-256,620	-13.6	57.2	60.4	1	5.32	4.95
ALEXIA LAMB WESTON	$5,267,476	$5,834,443	-$566,967	-9.7	885,606	1,034,160	-148,553	-14.4	38.9	44.7	1	5.95	5.64

- Frozen Vegetables is the largest subcategory $ volume, posting $ sales at $737.0M in the Northeast.
- Private Label is the leading Northeast brand, with $333M in volume and 45% market share, and growth of 1.4% in dollars and unit volume growth of 0.7%.
- Bird's Eye, commanding 2nd place for overall $ volume, shows a -6.1% decline in $ volume and -5.2% decline in unit volume.
- Private Label Organic, ranked 4th in overall subcategory $ volume, with +7.1% growth in $ volume and +6.2% in unit volume, boasting the highest overall growth in the category for both units & dollars.

SPINS Satori – 52 weeks ending 8-11-24

MULO: Frozen Vegetables
Top Markets Northeast Census Region

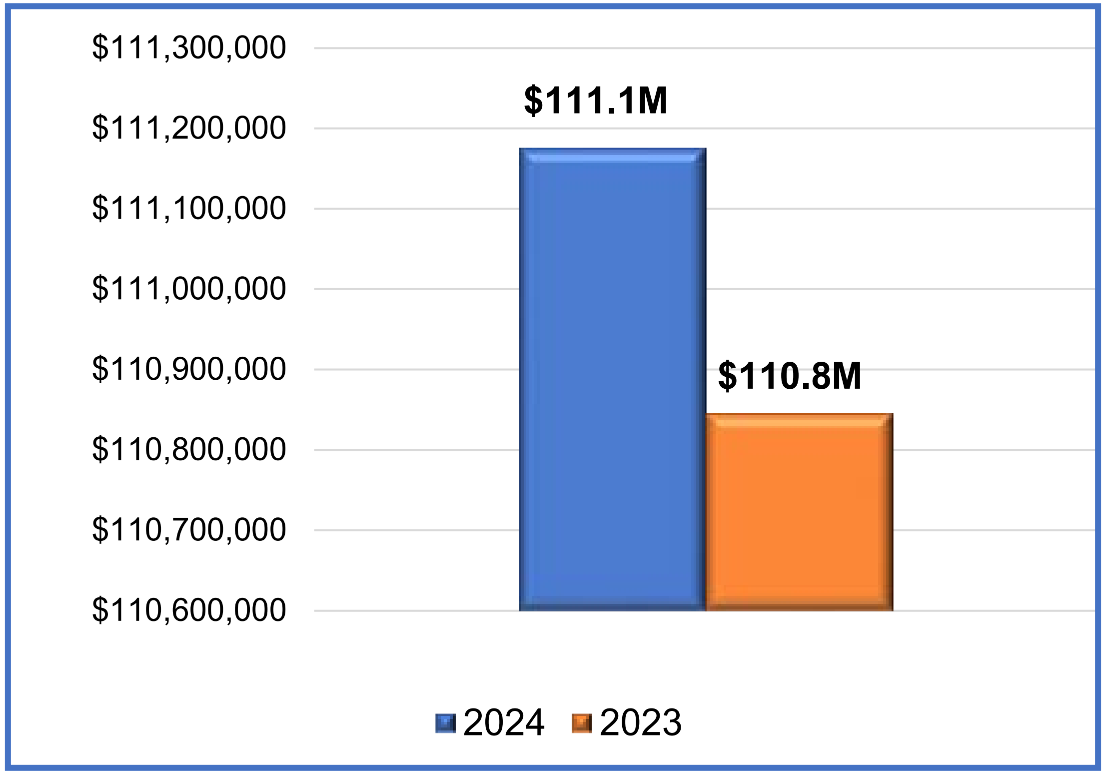
Geography	Description	Dollars	Dollars, Yago	Dollars +/- Chg, Yago	Dollars % Chg, Yago	Units	Units, Yago	Units +/- Chg, Yago	Units % Chg, Yago	TDP	TDP, Yago
NEW YORK, NY - MULO	FZ VEGETABLES	$215,403,364	$220,809,296	-$5,405,932	-2.4	80,839,355	84,066,679	-3,227,325	-3.8	$12,386	$12,699
BALTIMORE, MD/WASHINGTON D.C. - MULO	FZ VEGETABLES	$113,926,060	$116,077,164	-$2,151,104	-1.9	48,599,456	50,117,690	-1,518,234	-3	$11,913	$12,173
PHILADELPHIA, PA - MULO	FZ VEGETABLES	$94,956,025	$98,008,613	-$3,052,588	-3.1	42,156,127	43,210,386	-1,054,259	-2.4	$13,110	$13,374
BOSTON, MA - MULO	FZ VEGETABLES	$78,790,919	$79,817,200	-$1,026,280	-1.3	32,412,693	33,389,447	-976,754	-2.9	$11,823	$11,894
HARRISBURG/SCRANTON, PA - MULO	FZ VEGETABLES	$66,683,788	$67,441,475	-$757,686	-1.1	30,742,753	31,053,365	-310,612	-1	$12,866	$13,345
NEW ENGLAND - MULO	FZ VEGETABLES	$56,354,779	$57,028,486	-$673,707	-1.2	25,073,876	25,682,118	-608,242	-2.4	$10,823	$11,234
RICHMOND/NORFOLK, VA - MULO	FZ VEGETABLES	$50,930,468	$52,030,371	-$1,099,902	-2.1	21,505,034	22,258,640	-753,606	-3.4	$11,348	$11,595
HARTFORD, CT/SPRINGFIELD, MA - MULO	FZ VEGETABLES	$47,617,584	$48,359,200	-$741,616	-1.5	19,997,948	20,403,022	-405,075	-2	$11,737	$11,980
PITTSBURGH, PA - MULO	FZ VEGETABLES	$34,967,946	$35,787,097	-$819,151	-2.3	16,952,753	17,070,322	-117,569	-0.7	$10,923	$13,259
BUFFALO/ROCHESTER, NY - MULO	FZ VEGETABLES	$32,715,202	$33,505,948	-$790,746	-2.4	15,586,736	16,155,001	-568,265	-3.5	$11,059	$11,639
ALBANY, NY - MULO	FZ VEGETABLES	$18,058,482	$18,779,377	-$720,895	-3.8	8,166,551	8,553,746	-387,196	-4.5	$11,096	$11,797
SYRACUSE, NY - MULO	FZ VEGETABLES	$15,783,123	$16,338,098	-$554,975	-3.4	7,565,325	7,884,701	-319,376	-4.1	$10,731	$11,258
PROVIDENCE, RI - MULO	FZ VEGETABLES	$12,297,743	$12,389,167	-$91,424	-0.7	5,362,120	5,411,025	-48,905	-0.9	$10,799	$11,141

- New York is the largest market for Vegetables and responsible for $215M in sales, is experiencing a slight decline in dollar volume at 2.4% and larger decline in unit volume at -3.8%.
- New England, the 6th largest market, responsible for $56M in sales, is showing dollar decline of -1.2% and unit decline of -2.4%.
- All markets are in decline in this subcategory for both dollars and units.

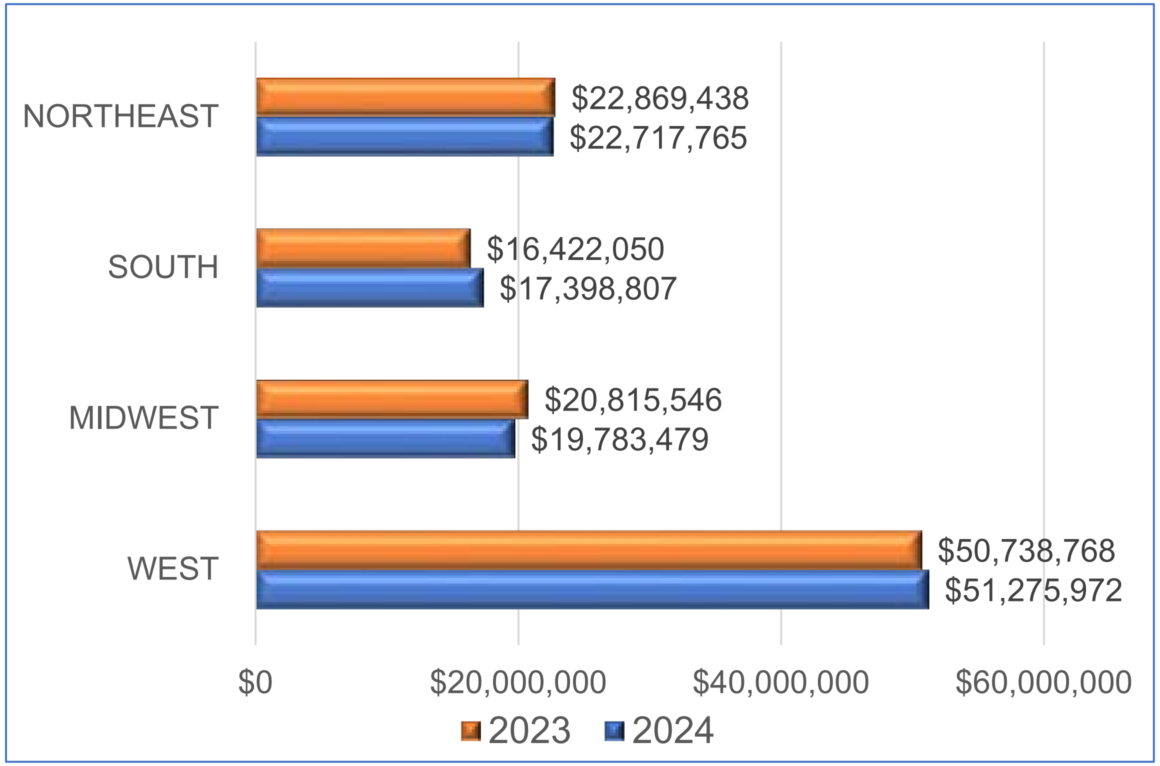
SPINS Satori – 52 weeks ending 8-11-24

Natural Channel: Frozen Vegetables Subcategory

ural Channel Total US Dollars



Dollar Change vs Year Ago

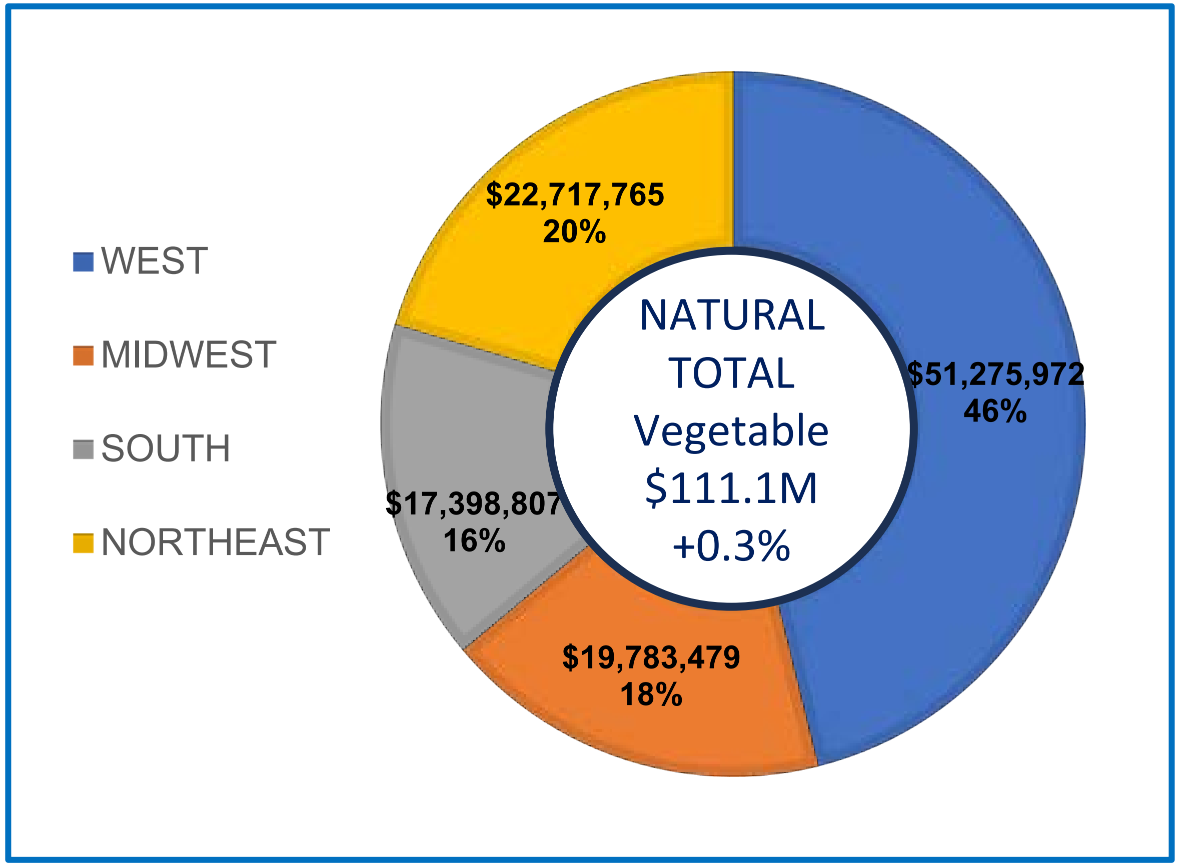


- Total Natural $ volume for the Frozen Vegetables subcategory is $111.1M and grew 0.3% over prior year.
- The West region is the largest $ Volume Region, followed by the Northeast, Midwest and South, respectively.
- Regions West and South are showing $ volume increases at +1.1% and +5.9%, respectively, while the Northeast and Midwest are negative to prior year, -0.7% and -5.0%, respectively.

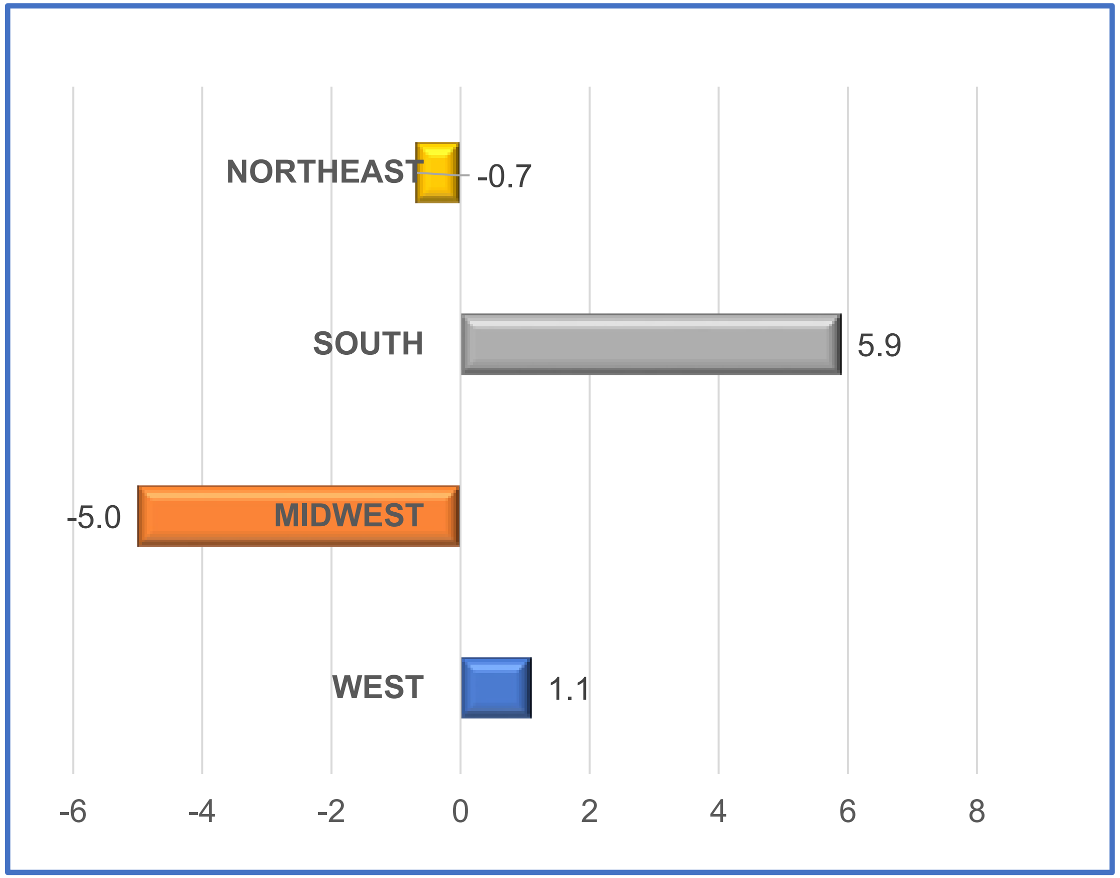
SPINS Satori – 52 weeks ending 8-11-24

Natural Channel: Frozen 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 46% of $ volume, and is showing the 2nd highest $ volume growth of the 4 census regions at 4.6% to prior year.
- The 3 remaining regions, South, Midwest and Northeast, are responsible for the remaining 54% of $ volume with growth of 5.0%, 5.0% and -0.7%, respectively.

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Natural Channel: Frozen Vegetables
Top 10 Brands Northeast Census Region

Description	Dollars	Dollars, Yago	Dollars +/- Chg, Yago	Dollars % Chg, Yago	Units	Units, Yago	Units +/- Chg, Yago	Units % Chg, Yago	Avg % ACV	TDP	Average Items Selling	ARP	ARP, Yago
FROZEN FRUITS & VEGETABLES	$58,771,535	$58,506,488	$265,047	0.5	$11,984,415	$12,403,834	-$419,419	-3.4		14232		4.9	4.72
FZ VEGETABLES	$22,717,765	$22,869,438	-$151,673	-0.7	$6,419,193	$6,721,826	-$302,633	-4.5		7714		3.54	3.4
WOODSTOCK	$4,566,111	$4,392,047	$174,065	4.0	$1,251,657	$1,233,194	$18,463	1.5	78.4	1288.8	15.7	3.65	3.56
BIRDS EYE	$3,597,956	$3,642,713	-$44,757	-1.2	$1,149,189	$1,216,472	-$67,282	-5.5	62.2	1443.3	23	3.13	2.99
CASCADIAN FARM	$3,090,722	$3,173,762	-$83,041	-2.6	$711,557	$797,461	-$85,904	-10.8	61.7	504.5	7.6	4.34	3.98
GREEN GIANT	$1,788,534	$1,885,749	-$97,215	-5.2	$576,610	$598,722	-$22,113	-3.7	58.1	1006.5	16.7	3.1	3.15
PRIVATE LABEL ORGANIC	$1,169,533	$1,030,145	$139,388	13.5	$302,957	$277,089	$25,867	9.3	23.5	283.4	12	3.86	3.72
GOYA	$1,103,806	$1,127,423	-$23,618	-2.1	$272,276	$296,810	-$24,534	-8.3	30.6	322.1	9.3	4.05	3.8
PRIVATE LABEL	$939,543	$1,019,313	-$79,770	-7.8	$292,687	$307,923	-$15,236	-4.9	37.4	190.9	4.8	3.21	3.31
HANOVER	$933,365	$978,674	-$45,309	-4.6	$310,475	$329,342	-$18,867	-5.7	44.1	656	13.6	3.01	2.97
BEST YET	$886,876	$903,775	-$16,899	-1.9	$301,403	$321,349	-$19,947	-6.2	18	305.1	16.5	2.94	2.81
STAHLBUSH	$684,273	$659,480	$24,793	3.8	$207,131	$208,536	-$1,405	-0.7	45	204.4	3.8	3.3	3.16

- Frozen Vegetables is the smallest subcategory, posting $22.7M sales in the Northeast, and is in slight decline at -0.7%.
- Woodstock is the leading Northeast brand in the subcategory, with $4.5M in volume, growing 4.0% in $ volume and 1.5% in unit volume.
- Bird's Eye, commanding 2nd place for overall $ volume, is in decline -1.2% in dollars and -5.5% in unit volume.
- Private Label Organic lands in the 7th position for overall $ volume and is the fastest growing in both dollar and unit volume with 13.5% and 9.3% growth, respectively.

SPINS Satori – 52 weeks ending 8-11-24

Retail Frozen Vegetables & Fruits Category & Subcategory Report

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