2014 CONSUMER PERISHABLES DATABOOK

Hot topics | Demographic differences | Product usage | Retail performance

Featuring data from Nielsen Perishables Group

A supplement to Grocery Headquarters magazine
Sizzle Your Onion Sales!

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Cooking trends drive fresh growth
Global influences and multicultural products are contributing to increased sales.

Information & Methodology

BAKERY DEPARTMENT
By targeting key households, innovating to meet consumers’ needs and implementing an effective promotional strategy retailers can continue to win sales.

MEAT DEPARTMENT
The meat department can continue to drive success by innovating with alternative cuts, meal solutions and consumer education.

DELI DEPARTMENT
Retailers have the opportunity to leverage the in-store deli as a point of differentiation, and attract shoppers from other retailers and from the foodservice industry.

SEAFOOD DEPARTMENT
Fresh and prepared products continue to draw shoppers into the seafood department despite increases in average retail price.

PRODUCE DEPARTMENT
By staying in tune with shifts in shopper behaviors and trends, retailers can provide consumers with the right products and maximize growth potential.

Category Data

Bakery Data
- 16 Bread
- 18 Muffins
- 20 Sweet goods

Meat Data
- 23 Processed lunch meat
- 24 Beef
- 26 Organic beef
- 28 Chicken
- 30 Frankfurters
- 32 Lamb
- 34 Pork
- 36 Veal

Deli Data
- 39 Bulk deli meat
- 40 Prepared chicken
- 42 Specialty cheese

Seafood Data
- 45 Oysters
- 46 Cod
- 48 Crab
- 50 Flounder
- 52 Halibut
- 54 Salmon
- 56 Scallops
- 58 Shrimp
- 60 Sushi

Produce Data
- 63 Raisins
- 64 Apples
- 66 Organic apples
- 68 Asparagus
- 70 Avocados
- 72 Bananas
- 74 Organic bananas

- 76 Beverages
- 78 Blueberries
- 80 Organic broccoli
- 82 Carrots
- 84 Organic celery
- 86 Cherries
- 88 Chili peppers
- 90 Citrus
- 92 Dips
- 94 Dried fruit/snack mixes
- 96 Figs
- 98 Garlic
- 100 Grapes
- 102 Cooking greens
- 104 Lettuce
- 106 Mushrooms
- 108 Specialty fruits
- 110 Sun-dried tomatoes

- 112 Sweet onions
- 114 Pears
- 116 Pineapples
- 118 Potatoes
- 120 Sweet potatoes
- 122 Refrigerated salad dressing
- 124 Strawberries
- 126 Tomatoes
- 128 Organic tomatoes
- 130 Value-added vegetables
- 132 Watermelon
- 134 Organic salad
Fresh, by the numbers
The Consumer Perishables Databook is an in-depth analysis of top categories within the fresh departments.

BY SETH MENDELSON

HOW MANY TYPES OF APPLES ARE CURRENTLY AVAILABLE TO CONSUMERS?

I will play it safe and say more than 20, though I am pretty certain that the answer could actually be quite a bit higher. How about grapes? Cuts of meat? And how many products are in the bakery section?

The answers vary dramatically, but one thing is certain: If a retailer is serious about making a statement that his or her grocery store wants to be everything to almost every consumer, they have to be sure that the fresh section is totally up to speed.

The various fresh sections are in an enviable position at supermarkets across the country. Besides being the cash cow of the store, the fresh departments set the tone for the overall business. Place a lot of emphasis on the section, with a broad array of product, the right fixtures and, most importantly, the correct lighting, and you make a statement with consumers that you are taking the fresh departments very seriously. That statement will spread across the store like wildfire.

So how do retailers know what works? The objective of our annual Consumer Perishables Databook is to help retailers make the decision on what categories to stock and what items that they should carry within those categories. We study 60 different categories across a number of perishables segments with the able assistance of the Nielsen Perishables Group.

Our job, as always, is to give retailers as much information as possible about these categories to help them determine their overall marketing and merchandising strategies, not to mention what products to carry across these segments.

Of course it is not just about how many types of products are available in the marketplace, but which of those items are most in-demand with consumers and give retailers the best chance to build sales and profits.
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TransCold Express: BNSF dedicated, bi-directional refrigerated 50-boxcar unit train between California Central Valley and the Midwest and beyond.

Photo courtesy of BNSF Railway
COOKING TRENDS DRIVE FRESH GROWTH

Global influences and multicultural products contribute to increased sales.

{BY CARA AMMON}

Consumers continue to place an emphasis on preparing fresh, healthy foods for their families. This can take many different forms, from preparing traditional home-cooked meals, to assembling value-added meal components, to providing healthy, on-the-go snacks. The fresh departments are responding to consumers’ needs with new items and packaging designed for today’s busy lifestyles. Although many consumers want gourmet meals made from quality products, there are still those that have lingering concerns about the economy, maintaining cautious spending habits. According to the most recent Nielsen Global Survey of Consumer Confidence and Spending Intentions, consumer confidence fell four points in the last quarter of 2013, and 71% of consumers believe the U.S. is still in a recession. These attitudes likely contribute to consumers’ desires to create healthy meals with premium ingredients at home.

Economic concerns may also be influencing where shoppers spend their food dollars. Traditional grocers still earn the majority of fresh dollars, but consumers are spreading their fresh purchases across a wider variety of retailers. Nielsen projects that by 2016 consumers will spend 15% of their fresh dollars at mass/supercenters and 12% of their fresh dollars at club stores.

No matter which type of retail outlet, fresh is more important to the retail environment than ever before. The five fresh departments: deli, produce, meat, bakery and seafood, are increasing contributions to store sales, now generating...
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30% of total sales. Meat is the largest contributor to the fresh space with 39% of dollar sales, followed closely by produce with 32% of dollar sales. During the 52 weeks ended February 22, the fresh departments continued to grow despite higher average retail prices. Dollar and volume sales increased for all five departments nationally.

Further evidence of fresh foods’ importance is basket size. According to data from Nielsen Homescan, baskets containing fresh foods are up to two times larger than baskets without fresh foods. In recent years, shoppers have been filling their baskets with products that satisfy four key needs. Products with health, convenience, premium indulgence and culturally inspired characteristics are driving growth and sparking innovation across fresh departments.

On a department level, bakery experienced significant growth across all areas, including desserts, breads and rolls and breakfast items. Overall, for the tracked period, bakery dollar sales and volume sales increased by 4.8% and 3.9%, respectively, compared to the previous year, driven by consumers’ needs for convenience, gourmet indulgence and expanding flavor palates.

Many consumers look to the bakery for convenience in the form of take-and-bake breads and rolls and other assemble-at-home items. Consumers who want “homemade” without the work have helped the take-and-bake segment grow by double-digits across the department.

Consumers also want premium indulgence, and where better to fulfill that desire than the bakery? Items with names that suggest decadence by listing or implying three or more flavors, such as cranberry oatmeal walnut, triple chocolate or coconut macadamia white chocolate, had significant growth. In addition to sweets, indulgence can also be in the form of savory items. Baked goods such as herb-infused breads and bagels can also satisfy a craving for a tempting treat.

Shifting demographics, the Internet and restaurants have introduced consumers to a variety of new flavors, and this has impacted what consumers look for in the bakery. Within breads, for example, naan and pita both experienced significant growth, up 13.7% and 5.0%, respectively, compared to the previous year.

The deli department is also experiencing strong growth, primarily driven by consumer demand for quick and easy meals and snacks for their families. Deli-prepared foods now generate 57% of department dollars. Seemingly, in an effort to compete with restaurants and provide an alternative option for take-out, retailers have improved the quality of their prepared food offerings and increased the variety and number of items available. This strategy is working; during the tracked period deli-prepared foods increased dollar and volume sales by 7.3% and 6.1%, respectively, more than any other deli offering. Dollar and volume sales are up in every deli prepared foods category.

Similar to bakery, consumers are looking for help creating “homemade” meals; they want to be more involved in preparing meals at home but want part of the work done for them. For example, pizza components that allow consumers to assemble a pizza at home have increased in dollars and volume 7.5% and 5.7%, respectively, compared to the previous year.
2013 was a very good year, apple crop-wise. And 2014? New York Apple Growers are anticipating another strong harvest. Quality, volume, variety: all are looking great, and that’s the kind of “good buzz” everyone likes to hear!

With millions of local branches near you, New York Apple Growers are looking forward to the fall and a truly “big apple” season of healthy goodness. We’re growing together and continue to deliver on our fresher, faster commitment to you and your customers.

SOME GOOD BUZZ ABOUT THIS YEAR’S NY APPLE CROP

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Photos courtesy of Mark Seethin, US Apple Association
With consumers’ busier lifestyles, many are skipping traditional meals in favor of on-the-go snacking. While they may not want a full meal, many are looking for healthy options and exotic flavors. Increasingly, the deli is providing options to meet these needs, and consumers are responding. Deli snacking items with a declared health benefit, such as low saturated fat or unsalted, experienced double-digit increases.

The meat department also experienced dollar and volume growth in all areas, despite slight across-the-board increases in average retail price. Total department dollars were up 3.5% and volume was up 1.3%. This growth can be attributed to some of the same trends occurring across fresh.

Consumers want to feel more involved in meal preparation, but in today’s busy world they are looking for quicker and easier options. As seen in other fresh departments, consumers want help in creating a “homemade” meal. Despite higher prices, the desire for easier meal solutions has led to increased sales in convenience items across beef, pork and chicken, including value-added meats, such as seasoned or marinated meats, and fully cooked meats.

Global influences are also evident within the meat department; consumers are trying new types and cuts of meat in a wide variety of multicultural flavors, including buffalo and goat or prepared meats with international seasonings such as sesame ginger or masala.

Traditional proteins and cuts of meat still generate the majority of sales; however higher retail prices are spurring new uses and more trading among the different proteins. For example, versatile cuts such as ground beef and chicken breasts can be used in any number of ways, and consumers can easily use these cuts as substitutes.

The produce department has also gained from greater demand for health benefits as consumers move toward including more fresh fruits and vegetables into their diets. Even with a 4.0% increase in average retail price, dollars increased 7.3%, and volume increased 3.2% for the tracked period.

Another contributing growth factor is the increasing popularity of value-added produce for meals and snacking. Both the value-added fruit and the value-added vegetable categories posted double-digit increases in dollars and volume during the latest 52 weeks. Though consumers are busier than ever—and snacking is becoming more important—they still want healthy options. Produce sales have benefited from this trend as produce companies are providing consumers with portion-controlled, healthy snacking options, such as single-serve, pre-cut vegetables with dip.

Value-added produce also allows for more convenient meal preparation. Value added vegetables for meal preparation and side dishes have experienced significant increases, with meal preparation dollars and volume up 8.7% and 8.0%, respectively, and side dish dollars and volume up 17.0 and 15.6%, respectively. Moving beyond just pre-cut vegetables, many of these items may be seasoned or packaged in microwavable bags. Like the meat department, consumers are seeking value-added components to help them create “homemade” meals.

The increasing demand for global flavors is present within the produce department as well. Consumers are discovering “new” fruits such as mango, papaya and pomegranate, and driving growth in the specialty fruit category. Additionally, while still small in terms of sales, there has been significant growth in exotic fruits and vegetables such as star fruit, sapote and sun chokes.

The seafood department’s dollar growth can be attributed in part to higher retail prices. For the 52 weeks ended February 22, volume remained steady and dollars increased 5.7%. The seafood department is the smallest of the fresh departments in terms of dollar sales; however, seafood shoppers are important to retailers. On average, seafood shoppers spend more than $75 per trip.

Similar to trends for fresh meat, seafood shoppers are looking for convenient meal solutions. During the past year, value-added seafood dollar sales increased 4.4% as consumers look for easier ways to prepare meals at home. Items such as stuffed or marinated salmon and seasoned shrimp contributed to growth in the value-added segment.

The seafood department also caters to shoppers seeking indulgence. Many consumers are turning to the seafood department for premium items for dinners at home; dollar and volume sales for products including lobster, crab and other higher-priced seafood items increased, along with the number of households purchasing these premium items.
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Information & Methodology

About the Nielsen Perishables Group
The Nielsen Perishables Group is the industry expert in fresh food consulting. As a vital part of Nielsen, a leading global provider of information and analytics around what consumers watch and buy, we provide a holistic picture of store-level activity across retail channels. Based in Chicago, the Nielsen Perishables Group offers a full spectrum of products and services geared toward complete market and category understanding. Solutions include retail measurement, consumer research, analytics, marketing communications, category development, best practice development and shopper insights. We have 14 years of experience refining tools and strategies for maximizing success in the fresh departments. Find out more at www.perishablesgroup.com.

About the data in this Consumer Perishables Databook
NIELSEN PERISHABLES GROUP FRESHFACTS®
The Nielsen Perishables Group provides point-of-sale scan data from the U.S. Fresh Coverage Area (FCA). The FCA universe includes key retailers from food, mass/supercenter and club chains, or more than 18,000 stores. The data set does not include alternative channels such as convenience or natural foods stores. The data is an aggregate of both UPC and random-weight (PLU and system 2) items. Data is aggregated from a store, item, weekly feed.

FRESHFACTS® SHOPPER INSIGHTS POWERED BY SPIRE, A DATALOGIX COMPANY
Through a partnership with Spire, the Nielsen Perishables Group develops insights around shopper dynamics and switching behaviors by accessing shopper loyalty card data. The loyalty card data includes every product purchased in the store, including all fresh department items, both UPC and random-weight. Data is from approximately five million static U.S. households covering a cross-section of regional food retailers. The Spire panel closely matches U.S. census demographic profile.
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Although often viewed as an occasion-based department, the bakery is a diverse and growing space. Bakery offerings are evolving to meet a range of shopper needs—from convenient breakfast solutions and meal components for lunch and dinner, to decadent desserts for personal treats and special occasions.

In 2012, rising everyday prices and decreased shopper trips slowed bakery department growth, however conditions rebounded in 2013. Dollar and volume sales increased 5% and 4% for the 52 week period ended February 22, and sales were up across the majority of bakery categories as pricing stabilized.

Shifting sales among complementary products was a notable bakery trend. For example, the rolls category outpaced bread dollar growth and gained volume share as a result of new and varied offerings. On average, retailers expanded offerings by 8% to include products primarily found in restaurants such as chocolate-filled croissants, cheese rolls and pretzel buns. A similar story is shaping up with cakes and cookies, which together account for 40% of department sales. Although a heavily shopped category, cake dollar and volume sales have slowed over the past year, but cookies are picking up the slack.

Cookies—like chocolate chip and snickerdoodle—offer shoppers a convenient, portion-controlled alternative to cakes. Nearly 45% of in-store bakery shoppers are seeking products that fulfill three primary needs: premium, convenience and health. These shoppers tend to be couples and families looking for quick meal solutions. It is important to understand and innovate around these needs and consider the type of consumer demanding them. To target these shoppers effectively, bakery products should be suitable for small households and families and meet at least one of the key needs.

Naturally, the bakery is known for premium, indulgence offerings. Shoppers seek out fudge, dipped treats and tres leches or tiramisu cake for their gourmet qualities. However, gourmet indulgence in the bakery is not limited to sweet flavors. Savory specialty rolls experienced double-digit growth with the introduction of new products such as cheese rolls and ciabatta/panini rolls.

Convenience at the in-store bakery takes many forms. Many U.S. households consist of one or two members and accommodating this demographic in the bakery translates to smaller package sizes, especially with desserts. With a 7% increase in dollar sales, another convenience craze in the bread segment is take-and-bake, which allows consumers to serve hot, fresh bread at their convenience.

Health is also priority for many consumers, even in a department commonly associated with indulgence. For example, consumers use mini desserts to manage portions; with additional mini dessert offerings in the bakery dollar and volume sales increased 7% and 5%, respectively. Gluten-free products also increased bakery presence, up 50% in dollar sales. Breads have the highest number of gluten-free products followed by dessert items like cakes and cookies.
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• Leverage the power of fresh to benefit the entire store
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**Share of Category Dollars**
Total U.S. for the 52 weeks ended 2/22/14

- 4-count muffins: 43.1%
- 6-count muffins: 10.2%
- 2-to 3-count muffins: 0.5%
- All other muffins: 14.3%
- 1-count/bulk muffins: 18.1%
- Mini muffins: 13.8%

**Average Weekly Dollar Sales by Region**
Total U.S. for the 52 weeks ended 2/22/14

<table>
<thead>
<tr>
<th>Region</th>
<th>Sales per Store per Week</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL</td>
<td>$57.00</td>
</tr>
<tr>
<td>CENTRAL</td>
<td>$64.93</td>
</tr>
<tr>
<td>EAST</td>
<td>$57.00</td>
</tr>
<tr>
<td>SOUTH</td>
<td>$50.00</td>
</tr>
<tr>
<td>WEST</td>
<td>$60.00</td>
</tr>
</tbody>
</table>

**Average Basket Size**
Total U.S. for the 52 weeks ended 2/22/14

<table>
<thead>
<tr>
<th>Category</th>
<th>Average Basket Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>BAKERY</td>
<td>$57.00</td>
</tr>
<tr>
<td>MUFFINS</td>
<td>$64.93</td>
</tr>
</tbody>
</table>

**Trend Comparisons**
Total U.S. for the 52 weeks ended 2/22/14

- Dollars Growth
- Volume Growth
- Average Retail Growth
- Distribution Points Selling Growth

Nielson Perishables Group Data – Point of sale charts; Nielsen Perishables Group FreshFacts®; Purchase Frequency and Basket Size charts; Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spins, a Datalogix company.
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**Share of Category Dollars**

Total U.S. for the 52 weeks ended 2/22/14

- **Cinnamon and other sweet rolls** 21.9%
- **Flavored sweet breads** 8.6%
- **Strudel** 9.9%
- **Pastries** 9.9%
- **Danish** 10.7%
- **Turnovers** 10.7%
- **Scones** 3.9%
- **Hispanic sweet goods** 3.1%
- **Other sweet goods** 3.0%
- **Coffee cakes** 18.7%
- **Sweets** 5.9%

**Average Weekly Dollar Sales by Region**

Total U.S. for the 52 weeks ended 2/22/14

- **TOTAL** $60.77
- **CENTRAL** $69.55
- **EAST** $70.00
- **SOUTH** $64.40
- **WEST** $54.80

- **TOTAL CINNAMON & COFFEE SWEET GOODS OTHER SWEET ROLLS CAKES TURNOVERS DANISH PASTRIES**

**Average Basket Size**

Total U.S. for the 52 weeks ended 2/22/14

- **BAKERY** $57.00
- **SWEET GOODS** $60.77

**Trend Comparisons**

Total U.S. for the 52 weeks ended 2/22/14

- **Dollars Growth**
- **Volume Growth**
- **Average Retail Growth**
- **Distribution Points Selling Growth**
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The Meat Department

The meat department can continue to drive success by innovating with alternative cuts, meal solutions and consumer education.

{By Kate Gritti, Nielsen Perishables Group}
Share of Category Dollars
Total U.S. for the 52 weeks ended 2/22/14

- Turkey: 31.5%
- Ham: 27.9%
- Salami: 16.1%
- Bologna: 10.5%
- Beef: 4.8%
- Chicken breast/roll: 4.5%
- Combination packs: 3.6%
- Loaves: 3.2%

Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14

Household Penetration
Total U.S. for the 52 weeks ended 2/22/14

HH penetration YAGO
HH penetration

- Total U.S.: 73.7%
- Total U.S.: 72.8%

Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14

- Dollars Growth
- Volume Growth
- Average Retail Growth
- Distribution Points Selling Growth

Share of Category Dollars
Total U.S. for the 52 weeks ended 2/22/14

Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14

Household Penetration
Total U.S. for the 52 weeks ended 2/22/14

Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14
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Share of Category Dollars
Total U.S. for the 52 weeks ended 2/22/14

- Conventional: 96.2%
- Natural: 3.4%
- Organic: 0.4%

Average Basket Size
Total U.S. for the 52 weeks ended 2/22/14

- Meat
- Organic beef

Household Penetration
Total U.S. for the 52 weeks ended 2/22/14

HH penetration YAGO
HH penetration

- 0.6%
- 0.2%

Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14

- Dollars Growth
- Volume Growth
- Average Retail Growth

Nielsen Perishables Group Data - Point-of-sale charts: Nielsen Perishables Group FreshFacts®; Purchase Frequency and Basket Size charts: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spins, a Datalogix company.
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Share of Category Dollars
Total U.S. for the 52 weeks ended 2/22/14

- Breasts: 56.1%
- Whole: 7.6%
- Thighs: 8.7%
- Legs/drumsticks: 8.8%
- Wings: 9.3%
- Ground: 1.0%
- Value-added breasts: 3.4%
- Value-added wings: 1.0%
- All other: 3.0%

Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14

Household Penetration
Total U.S. for the 52 weeks ended 2/22/14

Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14

- Dollars Growth
- Volume Growth
- Average Retail Growth
- Distribution Points Selling Growth

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<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
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<tr>
<td>Case Fill Rate</td>
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<tr>
<td>On-Time Delivery</td>
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<tr>
<td>Sales Increase*</td>
<td>6%-12%</td>
</tr>
<tr>
<td>Margin Increase*</td>
<td>1%-9%</td>
</tr>
</tbody>
</table>

*SOURCE: Nearly 15 years of customer results.

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* 2014 JFC LLC
Share of Category Dollars
Total U.S. for the 52 weeks ended 2/22/14

Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14

Household Penetration
Total U.S. for the 52 weeks ended 2/22/14

Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14

Dollars Growth
Volume Growth
Average Retail Growth
Distribution Points Selling Growth
DRIVE GROWTH THIS SUMMER WITH THE ORIGINAL, NATHAN’S FAMOUS

• FASTEST GROWING HOT DOG BRAND, driving more dollar growth over the last 3 years than any other brand¹

• SUPERIOR SALES VELOCITY, selling 8% faster per item than the category average²

¹Sales Trend using Dollar Sales during 52 Weeks Ending 4/13/14 vs. 52 Weeks ending 4/17/11
²Sales velocity calculated as Dollars Sold per Average Weekly Point of Distribution over 52 weeks ending 4/13/14, comparing Nathan’s Famous brand vs. total hot dog category average
Share of Category Dollars
Total U.S. for the 52 weeks ended 2/22/14

Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14

Average Basket Size
Total U.S. for the 52 weeks ended 2/22/14

Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14

---

Shepherd’s Pride lambs are raised on family ranches on a high-nutrient, 100% vegetarian diet, without added hormones or antibiotics. To give consumers total peace of mind, Mountain States Rosen has partnered with Where Food Comes From, Inc., a trusted third-party that verifies the source of origin of all Shepherd’s Pride lambs. Shoppers can scan the QR code on the package to learn about the hard-working, ethical producer families raising this fine, pure, American USDA Choice Lamb.

Bringing transparency to the meat case.

For more information about our company and products, call (NY) 800.872.5262 or (CO) 800.555.2551.

MOUNTAINSTATESROSEN.COM

photo courtesy of the American Lamb Board
**Share of Category Dollars**

Total U.S. for the 52 weeks ended 2/22/14

- Loin: 63.6%
- Ham/leg: 6.5%
- Fresh ground: 1.9%
- Offal: 4.5%
- Side: 8.3%
- Value-added: 6.0%
- Other: 2.5%
- Shoulder butt: 11.0%

**Average Weekly Dollar Sales by Region**

Total U.S. for the 52 weeks ended 2/22/14

<table>
<thead>
<tr>
<th>Region</th>
<th>$ sales per store per week a year ago</th>
<th>$ sales per store per week</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL</td>
<td>$6,000</td>
<td>$5,000</td>
</tr>
<tr>
<td>CENTRAL</td>
<td>$5,000</td>
<td>$4,000</td>
</tr>
<tr>
<td>EAST</td>
<td>$4,000</td>
<td>$3,000</td>
</tr>
<tr>
<td>SOUTH</td>
<td>$3,000</td>
<td>$2,000</td>
</tr>
<tr>
<td>WEST</td>
<td>$2,000</td>
<td>$1,000</td>
</tr>
</tbody>
</table>

**Household Penetration**

Total U.S. for the 52 weeks ended 2/22/14

HH penetration YAGO: 76.3%

HH penetration: 75.8%

**Trend Comparisons**

Total U.S. for the 52 weeks ended 2/22/14

- Dollars Growth
- Volume Growth
- Average Retail Growth
- Distribution Points
- Selling Growth
Celebrating 75 Years of Family Flavor &

 Tradition.

215.831.9000 • 800.333.1974 • SALES@DIETZANDWATSON.COM • DIETZANDWATSON.COM
DIETZ & WATSON INC. 5701 TACO NY ST., PHILA., PA 19135
Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14

Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14
versatile VEAL

Cedar Springs Veal is fork-tender and mouthwatering delicious. It assumes a place of honor during grilling season—as comfortable in haute cuisine as it is in fire-roasted burgers.

SCAN HERE to find tantalizing recipes that are quick and utterly satisfying.

For more information about our company and products, call (NY) 800.872.5262 or (CO) 800.555.2551.
MOUNTAINSTATESROSEN.COM
The Deli Department

Retailers have the opportunity to leverage the in-store deli as a point of differentiation, and attract shoppers from other retailers and from the foodservice industry.

{BY JADE BLACK, NIELSEN PERISHABLES GROUP}
Share of Category Dollars
Total U.S. for the 52 weeks ended 2/22/14

- Ham: 30.7%
- Turkey: 35.1%
- Beef: 12.6%
- Chicken: 7.3%
- Bologna: 4.0%
- Salami: 5.4%
- Lunchmeat loaves: 1.5%
- Pepperoni: 0.9%
- Italian specialty: 1.1%
- All other: 1.5%

Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14

- Total: $4,000
- Central: $2,000
- East: $6,000
- South: $4,000
- West: $10,000

Household Penetration
Total U.S. for the 52 weeks ended 2/22/14

- HH penetration YAGO: 56.3%
- HH penetration: 55.2%

Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14

- Dollars Growth
- Volume Growth
- Average Retail Growth
- Distribution Points
- Selling Growth
Average Weekly Dollar Sales by Region

Total U.S. for the 52 weeks ended 2/22/14

- TOTAL
- CENTRAL
- EAST
- SOUTH
- WEST

$0 $500 $1,000 $1,500 $2,000 $2,500 $3,000 $3,500 $4,000

- Dollars per store per week a year ago
- Dollars per store per week

Share of Category Dollars

Total U.S. for the 52 weeks ended 2/22/14

- Rotisserie: 43.9%
- Fried: 22.0%
- Appetizers: 10.5%
- Wings: 16.5%
- Chicken meals/combos/dinners: 5.4%
- Other: 0.8%
- Italian: 0.5%
- BBQ: 0.2%
- Stuffed: 0.1%

Average Basket Size

Total U.S. for the 52 weeks ended 2/22/14

- DELI
- PREPARED CHICKEN

$0 $10 $20 $30 $40 $50 $60 $70 $80 $90 $100

- $61.45
- $49.54

Trend Comparisons

Total U.S. for the 52 weeks ended 2/22/14

- Dollars Growth
- Volume Growth
- Average Retail Growth
- Distribution Points Selling Growth

*Nielsen Perishables Group Data – Point-of-sale charts; Nielsen Perishables Group FreshFacts®; Purchase Frequency and Basket Size charts: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spins, a Datalogix company.*
One good reason to look at your current fried chicken program?

**WE CAN PROVIDE MILLIONS**

100-store chain annual projected sales

- $9M
- $8M
- $7M
- $6M
- $5M
- $4M
- $3M
- $2M
- $1M
- $0

(Millions) $0

MRB | Fresh | Partnering with Better Retail™

Superior Ingredients + Easy-to-Execute Systems + Category Expertise & Support

**CHICKEN THAT LOOKS & TASTES BETTER, SELLS BETTER**

If you are not excited about your fried chicken program, your customers aren’t either… and you are leaving millions on the table. Our superior coating systems and easy-to-execute programs will infuse energy and experience into your fried chicken program. Give us the opportunity to make your fried chicken program a growth story.

better retail™
Food Programs Division
www.betterretail.com
**DELI|SPECIALTY CHEESE**

---

**Share of Category Dollars**
Total U.S. for the 52 weeks ended 2/22/14

- **All other**: 25.1%
- **Other flavored**: 14.1%
- **Cheddar**: 9.5%
- **Parmesan**: 9.3%
- **Gouda**: 4.3%
- **Brie**: 4.3%
- **Blue**: 4.4%
- **Swiss**: 4.4%
- **Feta**: 7.7%
- **Hispanic**: 8.8%
- **Mozzarella**: 8.1%
- **Swiss**: 4.4%
- **Parmesan**: 9.3%
- **Mozzarella**: 8.1%

---

**Average Weekly Dollar Sales by Region**
Total U.S. for the 52 weeks ended 2/22/14

<table>
<thead>
<tr>
<th>Region</th>
<th>$ sales per store per week</th>
<th>$ sales per store per week a year ago</th>
<th>Dollars Growth</th>
<th>Volume Growth</th>
<th>Average Retail Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL</td>
<td>$4,000</td>
<td>$3,000</td>
<td>33%</td>
<td>10%</td>
<td>23%</td>
</tr>
<tr>
<td>CENTRAL</td>
<td>$2,000</td>
<td>$1,500</td>
<td>33%</td>
<td>10%</td>
<td>23%</td>
</tr>
<tr>
<td>EAST</td>
<td>$2,500</td>
<td>$2,000</td>
<td>25%</td>
<td>5%</td>
<td>20%</td>
</tr>
<tr>
<td>SOUTH</td>
<td>$1,500</td>
<td>$1,200</td>
<td>25%</td>
<td>5%</td>
<td>20%</td>
</tr>
<tr>
<td>WEST</td>
<td>$1,000</td>
<td>$800</td>
<td>0%</td>
<td>-5%</td>
<td>0%</td>
</tr>
</tbody>
</table>

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**Household Penetration**
Total U.S. for the 52 weeks ended 2/22/14

- **HH penetration YAGO**: 52.3%
- **HH penetration**: 50.7%

---

**Trend Comparisons**
Total U.S. for the 52 weeks ended 2/22/14

- **Dollars Growth**
- **Volume Growth**
- **Average Retail Growth**
- **Distribution Points Selling Growth**

---

_Nelson Perishables Group Data – Point-of-sale charts: Nielsen Perishables Group FreshFacts®; Purchase Frequency and Basket Size charts: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spins, a Datalogix company._

---

42 data | deli

CONSUMER PERISHABLES DATABOOK 2014
Introducing Roth Flavored Raclette

3 new flavors that change the rules of cheese.

The bold, new taste of Roth Raclette means no more boring cheddar or bland mozzarella. Now you can kick up the flavor in any recipe with Mediterranean, 5 Peppercorn and Roasted Garlic Raclette. A new punch of flavor for pizza, burgers and more with Roth Raclette cheese.

Adventure awaits.

rothcheese.com
The Seafood Department

Fresh and prepared products continue to draw shoppers into the seafood department despite increases in average retail price.

**BY GRAHAM MCDOWELL, NIELSEN PERISHABLES GROUP**

Seafood department dollar sales continued to climb due largely to an uptick in pricing and decreased promotional activity. The seafood department contributed 4.8% to total fresh sales for the 52 weeks ended February 22. Among the five fresh departments, seafood posted the second-largest dollar sales growth behind produce with a 5.7% increase. The department maintained volume sales compared to the previous year.

Fresh seafood accounted for 79% of department dollar sales, with $5 billion in total sales for the tracked period. A 5.4% average retail price increase helped fresh seafood drive dollar sales up 5.7% while also contributing to flat volume sales.

Shrimp, which accounted for 30% of fresh seafood sales, was a major driver of dollar growth during the period, due largely to a 12.3% increase in average retail price. This increase contributed to a 6.8% volume decline.

Fin fish accounts for the largest segment of fresh seafood with 56.3% of total sales. During the latest 52 weeks, fin fish dollar sales grew 6% while average retail price increased 2.9%. However, fin fish shoppers were not deterred by price increases; volume increased 3.6% compared to the prior year. Unlike other fresh seafood categories, promotions on fin fish did not drive dollar and volume increases, likely due to already low average retail pricing compared to other fresh seafood categories.

Within the fin fish segment, salmon and tilapia were the highest contributors to overall sales with 37.9% and 25.2% of category dollar sales, respectively. Salmon saw a large increase in average retail price with a 7.9% jump, which contributed to a 5.5% gain in total dollar sales compared to the prior year. However, the large spike in retail price did adversely impact volume, which was down 2.3%. Two years ago, the abundant salmon supply drove the retail price down 8% for the category. The data shows a natural market reaction to the supply leveling out and the industry returning to previous average retail price levels.

Tilapia continues to grow in popularity as a more affordable option relative to other fresh fish segments. The average retail price of tilapia was $3.82 per pound compared to salmon at $7.69. The average retail pricing remained steady, and dollars and volume increased 5.3% and 4.6%, respectively.

While a smaller segment than fin fish and shrimp, crustaceans showed strong growth as dollars were up 8.9% versus the prior year. Crustacean volume increased 9.6% as average retail prices declined 0.7%. Overall, promotional activity played a large part in total crustacean sales, with 41.4% of the category’s volume attributed to promotional activity. In comparison, the shrimp category only had 24.8% of promotional volume that contributed to total volume sales.

Looking beyond fresh seafood, consumer engagement with prepared seafood continues to grow. Prepared seafood dollar sales increased 4.4%, due largely to an increase in average retail price. Prepared seafood volume remained steady compared to the prior year.

Prepared fish posted increases in both dollars and volume, up 12.2% and 8.8%, respectively. In contrast, the prepared crustacean category was flat in dollar sales and down 2.9% in volume sales.
Household Penetration
Total U.S. for the 52 weeks ended 2/22/14

Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14

Average Basket Size
Total U.S. for the 52 weeks ended 2/22/14

Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14

Nielsen Perishables Group Data – Point-of-sale charts; Nielsen Perishables Group FreshFacts®; Purchase Frequency and Basket Size charts; Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spins, a Datalogix company.
Household Penetration
Total U.S. for the 52 weeks ended 2/22/14

Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14

Average Basket Size
Total U.S. for the 52 weeks ended 2/22/14

Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14
From the unspoiled waters of Alaska comes the finest cod on the market today.

Its slightly sweet flavor, and moist, firm texture is perfect for a wide variety of quick and easy meals. Plus, it’s low in calories and loaded with protein, B vitamins, and heart-healthy omega-3 fatty acids. Best of all, it’s environmentally sustainable and available year-round. Maybe that’s why 80% of consumers say that seeing our logo increases their likelihood to purchase.

For literature: www.alaskaseafood.org/retailers  •  For assets: alaskaseafood.creatorselect.com
For promotional support: Mark Jones 855-288-8841
Household Penetration
Total U.S. for the 52 weeks ended 2/22/14

Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14

Average Basket Size
Total U.S. for the 52 weeks ended 2/22/14

Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14
Wild, sustainable, and fully-cooked, Alaska snow crab is easy to enjoy as cocktail claws, whole legs, split legs, or lightly scored ‘Snap ‘n Eat’ sections. Low in fat and calories but high in protein, our snow crab shines as an appetizer, all-you-can-eat entrée, and in gourmet salads, soups, and seafood platters. Time-starved customers appreciate this convenient and delicious option that comes straight from the pure waters of Alaska – that’s why 8 out of 10 look for our logo when buying seafood.

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For promotional support: Mark Jones 855-288-8841
Household Penetration
Total U.S. for the 52 weeks ended 2/22/14

Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14

Average Basket Size
Total U.S. for the 52 weeks ended 2/22/14

Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14
Lean and tender, low calorie and delicious, wild Alaska sole is a healthy and economical option for seafood lovers. As with all Alaska Seafood, our sole is wild-caught and environmentally sustainable. It’s quick and easy to prepare, with mild flavors that are ideal for health-minded consumers on the go and many popular ethnic dishes. Just make sure you buy the right brand – 8 out of 10 consumers say they look for our logo when buying seafood.

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Household Penetration
Total U.S. for the 52 weeks ended 2/22/14

Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14

Average Basket Size
Total U.S. for the 52 weeks ended 2/22/14

Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14
Halibut

Alaska halibut is so elegant, it’s known as the king of flatfish.

Delicately delicious, with a firm and flaky texture, Alaska halibut is extremely versatile and easy to prepare. Consumers can enjoy it grilled, roasted, sautéed, or poached in healthy salads, hearty soups, exquisite entrées, or the best fish and chips they’ve ever had. Our halibut is wild-caught in the pristine waters of Alaska, where we’ve set the international standard for environmental sustainability. That’s why 80% of consumers say seeing our logo increases their likelihood to purchase.

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Household Penetration
Total U.S. for the 52 weeks ended 2/22/14

Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14

Average Basket Size
Total U.S. for the 52 weeks ended 2/22/14

Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14

- HH PENETRATION YAGO
- HH PENETRATION

- TOTAL FIN FISH SALMON
- SEAFOOD
- SALMON

- Dollars Growth
- Volume Growth
- Average Retail Growth
- Distribution Points
- Selling Growth

51% of consumers demand wild Alaska salmon for its unmatched versatility, unparalleled flavor, and proven health benefits. They know it is amazing smoked, grilled, roasted, sautéed, and poached, and they know it’s environmentally sustainable. An excellent source of high-quality protein and omega-3 fatty acids, Alaska salmon is the smart choice for the most important species in your seafood case. Just ask your customers!

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Household Penetration
Total U.S. for the 52 weeks ended 2/22/14

Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14

Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14

Harvested from the unspoiled waters of Alaska, our legendary wild scallops are known for their large size, sweet meat, and melt-in-your-mouth texture. Not only are they an easy and amazing addition to any cook’s culinary repertoire, but they’re also low in calories and high in protein and omega-3 fatty acids. Best of all, we can offer this uncommon luxury year-round. Maybe that’s why 80% of consumers say that seeing our logo increases their likelihood to purchase.

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For promotional support: Mark Jones 855-288-8841
Share of Category Dollars
Total U.S. for the 52 weeks ended 2/22/14

Cooked 46.8%
Raw 53.2%

Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14

Average Basket Size
Total U.S. for the 52 weeks ended 2/22/14

Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14

Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14

Dollars Growth
Volume Growth
Average Retail Growth
Distribution Points
Selling Growth
Power of the Brand

To consumers, the Alaska Seafood brand speaks volumes.

It’s as clear as the waters of Alaska: Your customers are looking for the Alaska Seafood Brand. For years, we’ve worked hard to maintain our position as the clear consumer choice by offering delicious and nutritious wild seafood that’s available year-round.

Consumers know our nation’s last frontier is truly unspoiled, with pure waters that are home to the world’s finest salmon, whitefish varieties and shellfish. That’s because Alaska pioneered the international standard for environmentally sustainable fisheries decades ago.

It’s this dedication that makes merchandising Alaska Seafood by name the most powerful way to boost sales and inspire customer loyalty. Just ask seafood lovers!

For more information or free in-store merchandising materials, contact Mark Jones toll free at 855-288-8841 or mjones@alaskaseafood.org

• 80% of consumers say that seeing the Alaska Seafood logo increases their likelihood to purchase.
Share of Category Dollars
Total U.S. for the 52 weeks ended 2/22/14

- Imitation lobster: 4.6%
- Imitation crab: 95.4%

Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14

- $ sales per store per week a year ago
- $ sales per store per week

Average Basket Size
Total U.S. for the 52 weeks ended 2/22/14

- Seafood: $76.52
- Surimi: $80.85

Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14

- Dollars Growth
- Volume Growth
- Average Retail Growth
- Distribution Points
- Selling Growth

Surimi seafood can be made from many different fish species. The highest quality surimi seafood is made with genuine Alaska Pollock harvested in the icy, pristine waters of Alaska. Our surimi is always succulent and sweet and a great source of protein and omega-3 fatty acids, and is naturally low in fat, cholesterol and calories. Pre-cooked and ready-to-use, there's no shell to remove and no waste. Ideal for any recipes that call for the flavor of lobster, shrimp, scallops and crab, Alaska surimi is available year-round. We think that’s why 8 out of 10 shoppers look for our logo when buying seafood.

For literature: www.alaskaseafood.org/retailers  •  For assets: alaskaseafood.creatorselect.com  
For promotional support: Mark Jones 855-288-8841
The Produce Department

By staying in tune with shifts in shopper behaviors and trends, retailers can provide consumers with the right products and maximize growth potential.

{BY JULIETTE KING, NIELSEN PERISHABLES GROUP}

The produce department led dollar growth in the perimeter of the store, increasing sales at a faster rate than the meat, deli, bakery and seafood departments. During the 52 weeks ended February 22, fresh produce dollar sales increased 7.3%. A 4.0% increase in average retail prices contributed to the strong dollar growth. A 3.2% increase in volume demonstrates that despite rising retail prices, consumers are willing to pay more for products that meet certain needs, like health and wellness or convenience. With 32.5% of total perishables dollar sales and a 99.7% household penetration, the produce department should be a vital part of any retailer’s winning strategy.

For the tracked period, the average ring of baskets containing produce was $56.29, the smallest of the five perishables departments. However, the average spend per trip increased 2.9% to $8.91, driven in part by higher pricing across the department. With the exception of bananas and grapes, each of the 10 top selling produce categories posted price increases from the previous year. For most categories, increased pricing did not deter shopper purchases. However, berries, which is the number one produce category in terms of dollar sales and has posted consistent growth for many years, had a slight decrease in volume sales as a cold spring limited production for the 2013 crop.

When looking at the produce categories with the highest dollar growth, a few consumer trends are brought to light. Fueled by cooking blogs and recipe websites the “foodie” movement continues to drive consumer engagement with food and cooking. Health and wellness is also a growing trend, especially in the produce department. Cooking greens led the entire department with the largest dollar growth from the prior year (24%), driven by kale with an astounding 102% increase from the prior year. Cooking vegetables grew nearly 11%, driven by Brussels sprouts, root vegetables and cauliflower, all of which had double-digit dollar growth. Ensuring a consistent offering of these traditional cooking-focused categories can attract that “gourmet at home” consumer and a larger basket ring.

Consumer demand for convenience is another trend impacting the produce department. Products that provide additional value to consumers continue to increase item count. For example, value-added vegetables—which includes meal prep, snacking and trays—increased 8.5% while value-added fruits (fresh-cut fruit, overwrap and jar and cups) increased 4.1%. Both categories posted dollar increases, 13.2% and 10.9%, respectively, compared to the previous year. Organic produce, while still less than 7% dollar share of the department, increased sales 21.6% from the prior year, outpacing conventional items’ 6.8% growth. While retailers should not miss out on the growth of organics, the importance does vary by category. At least one organic offering in the following categories is a must, as more than 20% of their sales come from organics: cooking greens, healthy alternatives, carrots, herbs/spices/seasonings and packaged salad.

By staying in tune with shifts in shopper behaviors and trends, retailers can provide consumers with the right products and maximize growth potential.

{BY JULIETTE KING, NIELSEN PERISHABLES GROUP}
### Household Penetration
Total U.S. for the 52 weeks ended 2/22/14

![Household Penetration Chart]

### Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14

![Average Weekly Dollar Sales by Region Chart]

### Average Basket Size
Total U.S. for the 52 weeks ended 2/22/14

<table>
<thead>
<tr>
<th>Produce</th>
<th>$56.39</th>
</tr>
</thead>
<tbody>
<tr>
<td>Raisins</td>
<td>$86.97</td>
</tr>
</tbody>
</table>

### Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14

- **TOTAL DRIED FRUITS AND SNACK MIXES**
- **RAISINS**

![Trend Comparisons Chart]

**Notes:**
Share of Category Dollars
Total U.S. for the 52 weeks ended 2/22/14

Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14

Average Basket Size
Total U.S. for the 52 weeks ended 2/22/14

Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14
Ralph faithfully tends to his orchards.

Ralph, an orchard manager and loyal Rainier employee for over 35 years, oversees a complicated yet highly productive block of Honeycrisp apples. Even the hilly terrain and windy conditions are no match for his strong faith and proven farming techniques which ensure the finest quality fruit.

That's the spirit Ralph!

RAINIER EMPLOYEES MAKING A DIFFERENCE.
**Share of Category Dollars**
Total U.S. for the 52 weeks ended 2/22/14

- Organic: 7.7%
- Conventional: 92.3%

**Average Basket Size**
Total U.S. for the 52 weeks ended 2/22/14

- Produce
- Organic Apples

**Household Penetration**
Total U.S. for the 52 weeks ended 2/22/14

HH penetration YAGO

HH penetration

0% 1% 2% 3% 4% 5% 6% 7% 8% 9% 10%

8.2% 8.3%

**Trend Comparisons**
Total U.S. for the 52 weeks ended 2/22/14

- Dollars Growth
- Volume Growth
- Average Retail Growth

#1 Selling Branded Organic Apples*

Shoppers Trust Daisy Girl Organics™

CMI · Wenatchee, WA
Apples · Pears · Cherries · Organics
www.cmiapples.com   509.663.1955

**Household Penetration**  
Total U.S. for the 52 weeks ended 2/22/14

**Average Weekly Dollar Sales by Region**  
Total U.S. for the 52 weeks ended 2/22/14

**Average Basket Size**  
Total U.S. for the 52 weeks ended 2/22/14

**Trend Comparisons**  
Total U.S. for the 52 weeks ended 2/22/14

---

**Produce**

<table>
<thead>
<tr>
<th>Category</th>
<th>0</th>
<th>10</th>
<th>20</th>
<th>30</th>
<th>40</th>
<th>50</th>
<th>60</th>
<th>70</th>
<th>80</th>
<th>90</th>
<th>100</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
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</tr>
<tr>
<td><strong>Asparagus</strong></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$87.43</td>
</tr>
</tbody>
</table>

**Average Weekly Dollar Sales by Region**

- TOTAL: $56.39
- CENTRAL: $54.54
- EAST: $67.94
- SOUTH: $73.99
- WEST: $64.25

**Average Basket Size**

<table>
<thead>
<tr>
<th>Category</th>
<th>0</th>
<th>10</th>
<th>20</th>
<th>30</th>
<th>40</th>
<th>50</th>
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<th>70</th>
<th>80</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
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<tr>
<td><strong>Asparagus</strong></td>
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<td></td>
<td></td>
<td></td>
<td>$87.43</td>
</tr>
</tbody>
</table>

**Trend Comparisons**

- **Total Cooking Vegetables**: Dollars Growth 3%, Volume Growth 6%, Average Retail Growth 9%, Distribution Points 12%
- **Asparagus**: Dollars Growth 3%, Volume Growth 6%, Average Retail Growth 9%, Selling Growth 12%

---

Nielson Perishables Group Data - Point-of-sale charts: Nielson Perishables Group FreshFacts®; Purchase Frequency and Basket Size charts: Nielson Perishables Group FreshFacts® Shopper Insights powered by Spins, a Datalogix company.
Some would call it an obsession... we call it category leadership.

Asparagus from Southern Specialties
Household Penetration
Total U.S. for the 52 weeks ended 2/22/14

Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14

Average Basket Size
Total U.S. for the 52 weeks ended 2/22/14

Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14
Leading the Industry with Superior Fruit, Ripening Expertise, and the Utmost in Customer Service

Oxnard
Seattle
Denver
Chicago
Dallas
Toronto
New Jersey
Atlanta
missionpro.com
800 549 3420

The Industry Standard
Share of Category Dollars
Total U.S. for the 52 weeks ended 2/22/14

- Regular: 97.5%
- Specialty: 2.5%

Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14

Household Penetration
Total U.S. for the 52 weeks ended 2/22/14

HH penetration YAGO: 89.1%
HH penetration: 89.2%

Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14

- Dollars Growth
- Volume Growth
- Average Retail Growth
- Distribution Points
- Selling Growth

Dole’s “Peel the Love Summer Tour” is coming back with even more stops and promotional opportunities than last year.

Contact your Dole representative to provide you with materials and help you schedule a Peel the Love event.
**Share of Category Dollars**
Total U.S. for the 52 weeks ended 2/22/14

- **Conventional**: 96.2%
- **Organic**: 3.8%

**Average Basket Size**
Total U.S. for the 52 weeks ended 2/22/14

- **Produce**
  - Average Basket Size
- **Organic Bananas**

**Household Penetration**
Total U.S. for the 52 weeks ended 2/22/14

- **HH penetration YAGO**: 6.2%
- **HH penetration**: 6.0%

**Trend Comparisons**
Total U.S. for the 52 weeks ended 2/22/14

- **Dollars Growth**
- **Volume Growth**
- **Average Retail Growth**

*Source: Nielsen Perishables Group Data – Point-of-sale charts; Nielsen Perishables Group FreshFacts®; Purchase Frequency and Basket Size charts; Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spins, a Datalogix company.*
The **Freshest** bananas are the ones that you can eat soon after they are harvested, not after they have spent weeks on an ocean freighter. At Organics Unlimited, we grow our bananas in Mexico, harvest them, and deliver them to the US within four days. They’re fresher, tastier and more sustainable than any organic banana on the market.

When you buy the GROW label, you’re also buying the most socially responsible bananas on the market.

To learn more about GROW, visit us at GROWBananas.org.

**Perfectly Fresh. Truly Organic. Naturally Delicious.** Simply put, it’s what we do.

www.organicsunlimited.com
### Share of Category Dollars

Total U.S. for the 52 weeks ended 2/22/14

- Smoothies: 30.6%
- Fruit juices: 46.6%
- Ciders: 7.7%
- Other beverages: 5.4%
- Coffee: 0.8%
- Waters: 6.0%
- Teas: 2.9%

### Average Weekly Dollar Sales by Region

Total U.S. for the 52 weeks ended 2/22/14

- **$0**
- **$300**
- **$600**
- **$900**
- **$1,200**
- **$1,500**

### Household Penetration

Total U.S. for the 52 weeks ended 2/22/14

HH penetration YAGO: 23.2%

HH penetration: 25.2%

### Trend Comparisons

Total U.S. for the 52 weeks ended 2/22/14

- **Dollars Growth**
- **Volume Growth**
- **Average Retail Growth**
- **Distribution Points Selling Growth**

We include only the most authentic, natural ingredients in our juices. That's how we stay true to you and the honest goodness nature intended. After all, it's our mission, our purpose.

When you choose True Organic, you choose Honest Goodness. We include only the most authentic, natural ingredients in our juices. That’s how we stay true to you and the honest goodness nature intended. After all, it’s our mission, our purpose.

CERTIFIED ORGANIC from the soil to the bottle

GROWING GREEN for future sustainability

FAMILY OWNED for three generations

GIVING BACK to our communities

OUR PROMISE to grow with integrity

WWW.TUREORGANICJUICE.COM 661.845.9435
Blueberries: The Perfect Package!

Blueberries are the perfect package deal, containing 100% healthy ingredients making HBF International the perfect choice for supplying your customers with the healthy choices required for leading a long fruitful life.

Hurst’s Berry Farm

503.687.2327 Phone
WWW.HURSTS-BERRY.COM Web
### Share of Category Dollars
Total U.S. for the 52 weeks ended 2/22/14

- **Conventional**: 94.0%
- **Organic**: 6.0%

### Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14

**Dollars Growth**
- **Conventional**: 94.0%
- **Organic**: 6.0%

**Volume Growth**
- **Central**: $30
- **East**: $40
- **South**: $20
- **West**: $25

**Average Retail Growth**

### Household Penetration
Total U.S. for the 52 weeks ended 2/22/14

<table>
<thead>
<tr>
<th>HH penetration YAGO</th>
<th>HH penetration</th>
</tr>
</thead>
<tbody>
<tr>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>1%</td>
<td>1%</td>
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<tr>
<td>2%</td>
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<td>7%</td>
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<td>9%</td>
<td>9%</td>
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<tr>
<td>10%</td>
<td>10%</td>
</tr>
</tbody>
</table>

- **TOTAL**: 1.6%
- **CENTRAL**: 1.4%
- **EAST**: 1.8%
- **SOUTH**: 1.7%
- **WEST**: 1.8%

### Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14

- **Dollars Growth**
- **Volume Growth**
- **Average Retail Growth**

---


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GHQ14CP06_080r1
Your body’s lovin’ it.

At Foxy we are dedicated to delivering you the freshest, highest quality organics – everyday. From field to fork and four generations of family farming later, we are committed to offering your customers premium quality, organically grown vegetables from a brand you can trust. Foxy Organics – to the health of your business, the health of the planet and the health of your customers.

Call (831) 751-7500 to order today. Ask for Jesse, Kevin or Brendan.

Foxy.com | The Nunes Company, Inc. | PO Box 673, Salinas, CA 93902
Share of Category Dollars
Total U.S. for the 52 weeks ended 2/22/14

- Baby: 66.9%
- Regular: 29.2%
- Bunch: 3.8%

Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14

<table>
<thead>
<tr>
<th>Region</th>
<th>TOTAL</th>
<th>CENTRAL</th>
<th>EAST</th>
<th>SOUTH</th>
<th>WEST</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales</td>
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<td></td>
</tr>
<tr>
<td>$0</td>
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<tr>
<td>$300</td>
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<tr>
<td>$600</td>
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<tr>
<td>$900</td>
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<tr>
<td>$1,200</td>
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<tr>
<td>$1,500</td>
<td></td>
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</tr>
</tbody>
</table>

Average Basket Size
Total U.S. for the 52 weeks ended 2/22/14

<table>
<thead>
<tr>
<th>Category</th>
<th>PRODUCE</th>
<th>CARROTS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$0</td>
<td>$56.39</td>
</tr>
<tr>
<td></td>
<td>$10</td>
<td></td>
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<td></td>
<td>$20</td>
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<td>$90</td>
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<tr>
<td></td>
<td>$100</td>
<td></td>
</tr>
</tbody>
</table>

Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14

- Dollars Growth
- Volume Growth
- Average Retail Growth
- Distribution Points
- Selling Growth
A family of Growing companies.

Bringing Insight & Innovation to the Table

Grimmway keeps a close finger on the pulse of today’s consumer. That’s how we give you the best, most innovative carrot products on the market as well as the newest, most creative ways to sell them.

www.grimmway.com
Share of Category Dollars
Total U.S. for the 52 weeks ended 2/22/14

- Organic: 12.5%
- Conventional: 87.5%

Average Basket Size
Total U.S. for the 52 weeks ended 2/22/14

Household Penetration
Total U.S. for the 52 weeks ended 2/22/14

- HH penetration YAGO: 19.1%
- HH penetration: 19.2%

Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14

- Dollars Growth
- Volume Growth
- Average Retail Growth
Original. Extra crispy.

At Foxy we are dedicated to delivering you the freshest, highest quality organics – everyday. From field to fork and four generations of family farming later, we are committed to offering your customers premium quality, organically grown vegetables from a brand you can trust. Foxy Organics – to the health of your business, the health of the planet and the health of your customers.

Call (831) 751-7500 to order today. Ask for Jesse, Kevin or Brendan.

Foxy.com | The Nunes Company, Inc. | PO Box 673, Salinas, CA 93902

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Consumers count on us not only to deliver the best cherries nature has to offer but also to make them convenient to eat, anytime, anywhere. We’re answering their demands with one of our Go Fruit Convenience Packs, the pouch bag. Just the perfect fruit presentation that entices consumers to grab a nutritious snack on the go.

It’s a Chelan Fresh exclusive.

One for you, two for me, one for you, three for me.

It’s going to be a bumper crop!

ChelanFresh.com
Available in HOT or MILD varities through these participating grower/shippers.

DESERt SPRINGS PRODUCE 575.267.4808 gillisfarms.com

MA & SONS 575.267.1122 maandsonschilepromotions.com

MESILLA VALLEY PRODUCE 575.650.4427

SECO SPICE 575.233.9000 secospice.com

YOUNG GUNS 575.267.3001 younggunsproduce.com

THE PEPPER WITH ENDLESS POSSIBILITIES

For more information and promotional support, contact New Mexico Department of Agriculture at www.newmexicotradition.com
**Share of Category Dollars**
Total U.S. for the 52 weeks ended 2/22/14

- Oranges: 34.4%
- Limes: 9.0%
- Lemons: 14.3%
- Mandarins: 32.9%
- Grapefruit: 6.5%
- Specialty fruits: 0.1%
- Tangerines: 2.8%

**Average Weekly Dollar Sales by Region**
Total U.S. for the 52 weeks ended 2/22/14

<table>
<thead>
<tr>
<th>Region</th>
<th>Total</th>
<th>Central</th>
<th>East</th>
<th>South</th>
<th>West</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales per store per week</td>
<td>$0</td>
<td>$500</td>
<td>$1,000</td>
<td>$1,500</td>
<td>$2,000</td>
</tr>
</tbody>
</table>

**Average Basket Size**
Total U.S. for the 52 weeks ended 2/22/14

<table>
<thead>
<tr>
<th>Category</th>
<th>Total U.S.</th>
<th>Citrus</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRODUCE</td>
<td>$56.39</td>
<td>$80.23</td>
</tr>
<tr>
<td>CITRUS</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Trend Comparisons**
Total U.S. for the 52 weeks ended 2/22/14

- Dollars Growth
- Volume Growth
- Average Retail Growth
- Distribution Points
- Selling Growth

Citrus for Every Season!

The fresh and delicious addition of citrus to your menu doesn’t have to be seasonal. We deliver a variety of Dandy® citrus all year-round including our now-famous Meyer lemons, California and Florida oranges, mandarins, grapefruit, and lemons. Our global partnerships with growers mean we can bring you the best in citrus every day, so you have the ingredients for standout dishes.
Share of Category Dollars
Total U.S. for the 52 weeks ended 2/22/14

- Vegetable: 79.8%
- Fruit: 17.6%
- Other: 2.6%

Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14

- TOTAL
- CENTRAL
- EAST
- SOUTH
- WEST

Household Penetration
Total U.S. for the 52 weeks ended 2/22/14

HH penetration YAGO: 19.6%
HH penetration: 19.9%

Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14

- Dollars Growth
- Volume Growth
- Average Retail Growth
- Selling Growth
- Distribution Points

Grow your sales with America’s #1 branded guacamole!

**Wholly Guacamole®** Brand *Leads in:*
Sales | Category Growth | Product Innovation | Flavor Profiles

All **Wholly™** Products:
All Natural | Gluten Free | Kosher | Taste Homemade

Please contact our Retail Sales Representatives
Telephone: 817.509.0626 | Fax: 817.509.0636

Fresherized Foods | 300 Burlington Rd. Saginaw, TX 76179
*According to BI 2014
Share of Category Dollars
Total U.S. for the 52 weeks ended 2/22/14

Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14

Average Basket Size
Total U.S. for the 52 weeks ended 2/22/14

Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14

Fuel your life.

Mariani PREMIUM

Premium Dried Fruit

As the demand for healthy, high-energy and better-for-you snacks continues to rise, help your consumers to fuel their lives – and fuel your sales with Mariani premium dried fruit snacks!

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Mediterranean-origin seed.
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Innovative products and pack types.

It all adds up to the best California garlic. Find out why leading foodservice, industrial, and retail customers choose The Garlic Company over everyone else.

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Share of Category Dollars
Total U.S. for the 52 weeks ended 2/22/14

Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14

Household Penetration
Total U.S. for the 52 weeks ended 2/22/14

Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14

*HH penetration YAGO vs. HH penetration*

*Nelson Perishables Group Data – Point-of-sale charts; Nielsen Perishables Group FreshFacts®; Purchase Frequency and Basket Size charts; Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spins, a Datalogix company.*
WE DON’T JUST SOURCE GLOBAL, WE ARE GLOBAL.

For all your grape needs, contact us.
661.858.8240
www.alliancointproduce.com
### Share of Category Dollars

**Total U.S. for the 52 weeks ended 2/22/14**

- **Spinach**: 49.3%
- **Collard greens**: 9.2%
- **Kale**: 24.8%
- **Rapini/broccoli raab**: 4.5%
- **Other cooking greens**: 3.8%
- **Mustard greens**: 2.4%
- **Chard**: 2.4%
- **Dandelion greens**: 0.6%
- **All other**: 0.1%

### Average Weekly Dollar Sales by Region

**Total U.S. for the 52 weeks ended 2/22/14**

- **Central**: $500
- **East**: $600
- **South**: $500
- **West**: $400

### Household Penetration

**Total U.S. for the 52 weeks ended 2/22/14**

- **HH penetration YAGO**: 21.5%
- **HH penetration**: 21.8%

### Trend Comparisons

**Total U.S. for the 52 weeks ended 2/22/14**

- **Dollars Growth**
- **Volume Growth**
- **Average Retail Growth**
- **Distribution Points**
- **Selling Growth**
OUR BUSINESS IS GROWING

824 Fairview Road, Pelion, SC 29123 | 803-894-1900 | www.rawl.net | www.facebook.com/WPRawl
Share of Category Dollars
Total U.S. for the 52 weeks ended 2/22/14

Average Basket Size
Total U.S. for the 52 weeks ended 2/22/14

Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14
Expect More!

We Deliver

Unmatched product quality & uniformity, daily

Longer shelf life and reduced shrink

Face & place convenience

Private labeling for top national brands

Grown & Shipped by

Hollandia PRODUCE, L.P.

GFSI Food Safety Audits by

primusGFS

PO Box 1327 Carpinteria, CA 93014 (805) 684-4146 www.livegourmet.com
Share of Category Dollars
Total U.S. for the 52 weeks ended 2/22/14

- Brown: 30.3%
- White: 62.6%
- Specialty: 2.3%
- Combo-blends: 1.1%
- Dried: 0.6%
- Other: 3.1%

Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14

Household Penetration
Total U.S. for the 52 weeks ended 2/22/14

- HH penetration YAGO: 41.1%
- HH penetration: 40.8%

Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14

- Dollars Growth
- Volume Growth
- Average Retail Growth
- Distribution Points Selling Growth
Year after year, Giorgio remains America’s Favorite Mushroom. Since 1928 we’ve enjoyed a reputation for growing the finest quality white, brown and specialty mushrooms – all backed by the most advanced technology and sustainable growing techniques.

Today, mushrooms are in demand, being naturally fat-free, cholesterol-free and low in calories and sodium. As the numbers show, mushroom volume and dollar sales are growing.

If you’re looking to grow your mushroom sales, you can’t pick a better partner than Giorgio.
Share of Category Dollars
Total U.S. for the 52 weeks ended 2/22/14

Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14

Household Penetration
Total U.S. for the 52 weeks ended 2/22/14

Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14
“Growing The Freshest Specialty Fruits”

www.melissas.com
**Share of Category Dollars**
Total U.S. for the 52 weeks ended 2/22/14

- **Herbs, spices, seasonings**: 97.4%
- **Sun-dried tomatoes**: 2.6%

**Average Weekly Dollar Sales by Region**
Total U.S. for the 52 weeks ended 2/22/14

<table>
<thead>
<tr>
<th>Region</th>
<th>TOTAL</th>
<th>CENTRAL</th>
<th>EAST</th>
<th>SOUTH</th>
<th>WEST</th>
</tr>
</thead>
<tbody>
<tr>
<td>$ sales per store per week</td>
<td>$35</td>
<td>$30</td>
<td>$25</td>
<td>$20</td>
<td>$15</td>
</tr>
</tbody>
</table>

**Household Penetration**
Total U.S. for the 52 weeks ended 2/22/14

| HH penetration YAGO | 2.1% |
| HH penetration      | 1.9% |

**Trend Comparisons**
Total U.S. for the 52 weeks ended 2/22/14

- **Dollars Growth**
- **Volume Growth**
- **Average Retail Growth**
- **Distribution Points**
- **Selling Growth**
Drenched in the California Sun
from our family to your store

California Sun Dry Foods – America’s Leading Brand of California Grown, Dried, and Packaged, Sun-Dried Tomatoes

We offer the only complete line of Sun-Dried Tomato products...

Trade and consumer marketing programs designed to:
- Increase Your Volume and Profit
- Increase Consumption
- Grow the Category
- Increase Trial

COMPREHENSIVE MERCHANDISING SOLUTIONS AND LUCRATIVE TRADE PROMOTIONS
Call today to learn more about this dynamic and growing category 925.743.9973

*National retail sales data 12/31/13

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**Share of Category Dollars**
Total U.S. for the 52 weeks ended 2/22/14

- Sweet onions 32.3%
- All other onions 67.8%

**Average Weekly Dollar Sales by Region**
Total U.S. for the 52 weeks ended 2/22/14

<table>
<thead>
<tr>
<th>Region</th>
<th>Total ONIONS</th>
<th>SWEET ONIONS</th>
<th>All other onions</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Dollars Growth</td>
<td>Volume Growth</td>
<td>Average Retail Growth</td>
</tr>
<tr>
<td></td>
<td>$0</td>
<td>$100</td>
<td>$200</td>
</tr>
<tr>
<td></td>
<td>$200</td>
<td>$300</td>
<td>$400</td>
</tr>
<tr>
<td></td>
<td>$300</td>
<td>$400</td>
<td>$500</td>
</tr>
<tr>
<td></td>
<td>$400</td>
<td>$500</td>
<td>$600</td>
</tr>
</tbody>
</table>

**Household Penetration**
Total U.S. for the 52 weeks ended 2/22/14

- HH penetration YAGO: 59.0%
- HH penetration: 57.5%

**Trend Comparisons**
Total U.S. for the 52 weeks ended 2/22/14

- Dollars Growth
- Volume Growth
- Average Retail Growth

*GHQ14CP06_112r1*
Put Your Vidalia® Sweet Onion Season In Our Hands.

Doing the Right Thing for Your Business and the Sweet Onion Category.

At Shuman Produce, doing the right thing is in our DNA and we are proud of our Vidalia® sweet onion heritage. Today, we are an industry-leading sweet onion supplier who believes that an emphasis on long-term relationships, product quality, innovative marketing and category differentiation is what sets us apart. Contact us to learn how RealSweet® your onion category can be.

Learn more at www.realsweet.com
Share of Category Dollars
Total U.S. for the 52 weeks ended 2/22/14

- Bartlett 38.9%
- Anjou 27.4%
- Bosc 16.9%
- Asian 5.2%
- Packham 3.1%
- Red Anjou 2.5%
- All other red 1.7%
- Comice 0.8%
- Red Bartlett 0.6%

Average Basket Size
Total U.S. for the 52 weeks ended 2/22/14

- PRODUCE
- PEARS

<table>
<thead>
<tr>
<th>PRODUCE</th>
<th>PEAR</th>
<th>$ sales per store per week a year ago</th>
<th>$ sales per store per week</th>
</tr>
</thead>
<tbody>
<tr>
<td>$0</td>
<td>$0</td>
<td>$56.39</td>
<td>$85.61</td>
</tr>
<tr>
<td>$10</td>
<td>$10</td>
<td></td>
<td></td>
</tr>
<tr>
<td>$20</td>
<td>$20</td>
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<td></td>
</tr>
<tr>
<td>$30</td>
<td>$30</td>
<td></td>
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<tr>
<td>$40</td>
<td>$40</td>
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<td>$60</td>
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<td>$70</td>
<td>$70</td>
<td></td>
<td></td>
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<tr>
<td>$80</td>
<td>$80</td>
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<td></td>
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<tr>
<td>$90</td>
<td>$90</td>
<td></td>
<td></td>
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<tr>
<td>$100</td>
<td>$100</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14

- Dollars Growth
- Volume Growth
- Average Retail Growth
- Distribution Points Selling Growth

Our team of experts can help you create a more profitable pear category. We offer customized analysis and plans, and can show how you compare to the competition in key areas. Call us today to see how pear promotion leads to pear profits.

Contact Us Today!
1 (800) 547-4610
profits@usapears.com

All facts shown are results from category data research conducted by Pear Bureau Northwest during the period of Fall 2010 – Spring 2013.
Share of Category Dollars
Total U.S. for the 52 weeks ended 2/22/14

- Regular: 36.9%
- Gold: 63.1%

Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14

Household Penetration
Total U.S. for the 52 weeks ended 2/22/14

- HH penetration YAGO: 14.3%
- HH penetration: 13.1%

Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14
Refresh Your Customer Experience

Del Monte Gold® Extra Sweet Pineapple sets the gold standard for consistent excellence.

Its dazzling color and renowned sweetness will entice your customers.

Go with Del Monte Gold® Extra Sweet Pineapple and you’re as good as gold.
Share of Category Dollars
Total U.S. for the 52 weeks ended 2/22/14

Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14

Average Basket Size
Total U.S. for the 52 weeks ended 2/22/14

Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14
a new twist on
Scalloped Potatoes

Chipotle Potato Stacks

Offer your consumers a new twist on traditional recipes with the Klondike Rose® potato. This red-skinned potato with a heart of gold features a creamy, golden texture and buttery flavor that’s sure to please. One bite, and you’ll have them coming back for more.

To see more potato varieties, visit www.klondikebrands.com

Potandon Produce L.L.C. 800-767-6104
Household Penetration
Total U.S. for the 52 weeks ended 2/22/14

Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14

Average Basket Size
Total U.S. for the 52 weeks ended 2/22/14

Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14

0% 10% 20% 30% 40% 50%

HH PENETRATION

HH PENETRATION YAGO

0% 10% 20% 30% 40% 50%

CENTRAL EAST SOUTH WEST
TOTAL

$ sales per store per week a year ago $ sales per store per week

0% 2% 4% 6% 8% 10% 12%

TOTAL SWEET POTATOES

Average Weekly Dollar Sales by Region

Average Basket Size

Trend Comparisons

TOTAL SWEET POTATOES

Dollars Growth
Volume Growth
Average Retail Growth
Distribution Points
Selling Growth

0% 2% 4% 6% 8% 10% 12%

GHQ14CP06_120r1
Sweet Potatoes

Experience the great taste you’ve come to expect from Bland Farms and the famous Vidalia growing region now in a Sweet Potato.

1.800.VIDALIA - www.BlandFarms.com
**Household Penetration**

Total U.S. for the 52 weeks ended 2/22/14

- HH PENETRATION YAGO
- HH PENETRATION

**Average Weekly Dollar Sales by Region**

Total U.S. for the 52 weeks ended 2/22/14

- TOTAL
- CENTRAL
- EAST
- SOUTH
- WEST

**Average Basket Size**

Total U.S. for the 52 weeks ended 2/22/14

- PRODUCE
- SALAD DRESSING

<table>
<thead>
<tr>
<th>TOTAL DRESSINGS, GLAZES, MARINADES, SAUCES</th>
<th>$0</th>
<th>$10</th>
<th>$20</th>
<th>$30</th>
<th>$40</th>
<th>$50</th>
<th>$60</th>
<th>$70</th>
<th>$80</th>
<th>$90</th>
<th>$100</th>
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<tbody>
<tr>
<td>$56.39</td>
<td>$89.10</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Trend Comparisons**

Total U.S. for the 52 weeks ended 2/22/14

- Dollars Growth
- Volume Growth
- Average Retail Growth
- Distribution Points
- Selling Growth

Marzetti® has a history of bringing products to the market that meet consumer needs and drive retail sales.

Partner with the leader in refrigerated salad dressings to grow your sales!

Based on IRI Total U.S. Multi-Outlet Dollar Sales ending 3/23/14.
**Household Penetration**
Total U.S. for the 52 weeks ended 2/22/14

<table>
<thead>
<tr>
<th>HH PENETRATION</th>
<th>HH PENETRATION YAGO</th>
</tr>
</thead>
<tbody>
<tr>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>10%</td>
<td></td>
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<tr>
<td>20%</td>
<td></td>
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<tr>
<td>30%</td>
<td></td>
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<td>40%</td>
<td></td>
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<tr>
<td>50%</td>
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<tr>
<td>60%</td>
<td></td>
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<tr>
<td>70%</td>
<td></td>
</tr>
<tr>
<td>80%</td>
<td></td>
</tr>
</tbody>
</table>

**Average Weekly Dollar Sales by Region**
Total U.S. for the 52 weeks ended 2/22/14

- **Central**
- **East**
- **South**
- **West**

<table>
<thead>
<tr>
<th>$ sales per store per week a year ago</th>
<th>$ sales per store per week</th>
</tr>
</thead>
<tbody>
<tr>
<td>$0</td>
<td>$500</td>
</tr>
<tr>
<td>$500</td>
<td>$1,000</td>
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<tr>
<td>$1,000</td>
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<tr>
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<td>$2,500</td>
</tr>
<tr>
<td>$2,500</td>
<td>$3,000</td>
</tr>
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</table>

**Average Basket Size**
Total U.S. for the 52 weeks ended 2/22/14

<table>
<thead>
<tr>
<th>PRODUCE</th>
<th>STRAWBERRIES</th>
<th>$56.39</th>
<th>$84.28</th>
</tr>
</thead>
<tbody>
<tr>
<td>$0</td>
<td>$10</td>
<td>$20</td>
<td>$30</td>
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<td>$40</td>
<td>$50</td>
<td>$60</td>
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</tr>
<tr>
<td>$70</td>
<td>$80</td>
<td>$90</td>
<td>$100</td>
</tr>
</tbody>
</table>

**Trend Comparisons**
Total U.S. for the 52 weeks ended 2/22/14

- **Dollars Growth**
- **Volume Growth**
- **Average Retail Growth**
- **Distribution Points**
- **Selling Growth**
Well•Pict’s Flavor Is On Everyone’s Lips!

What’s black and white, and red all over? It’s black and white that Well•Pict Berries will increase your ring! And there’s nothing more beautiful than these luscious red berries, with their superior size and abundant health benefits. On the tips of tongues everywhere this spring, customers will be asking for them by name.

Visit Us At United Booth #423!

wellpict.com USA 831-722-3871
Share of Category Dollars
Total U.S. for the 52 weeks ended 2/22/14

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Snacking</td>
<td>29.2%</td>
</tr>
<tr>
<td>Field</td>
<td>14.0%</td>
</tr>
<tr>
<td>Roma</td>
<td>17.0%</td>
</tr>
<tr>
<td>Hothouse round</td>
<td>13.2%</td>
</tr>
<tr>
<td>Hothouse on the vine</td>
<td>26.6%</td>
</tr>
</tbody>
</table>

Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14

<table>
<thead>
<tr>
<th>Region</th>
<th>Total</th>
<th>Central</th>
<th>East</th>
<th>South</th>
<th>West</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales per store per week a year ago</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sales per store per week</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Average Basket Size
Total U.S. for the 52 weeks ended 2/22/14

<table>
<thead>
<tr>
<th>Category</th>
<th>Sales per Store per Week</th>
</tr>
</thead>
<tbody>
<tr>
<td>Produce</td>
<td>$56.39</td>
</tr>
<tr>
<td>Tomatoes</td>
<td>$78.21</td>
</tr>
</tbody>
</table>

Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14

- Dollars Growth
- Volume Growth
- Average Retail Growth
- Distribution Points
- Selling Growth

Kingdom Fresh Farms

The perfect slice.

Direct from the Farm year round!

HEADQUARTERS
2243 North Goolie Rd.
Donna, TX 78537
Tel. (956)668-8988

Produce Traceability Initiative

primus GFS
when food safety counts.
**Share of Category Dollars**
Total U.S. for the 52 weeks ended 2/22/14

- Conventional: 92.9%
- Organic: 5.2%
- Natural: 1.9%

**Average Weekly Dollar Sales by Region**
Total U.S. for the 52 weeks ended 2/22/14

- Central
- East
- South
- West

**Household Penetration**
Total U.S. for the 52 weeks ended 2/22/14

- HH penetration YAGO: 7.6%
- HH penetration: 8.7%

**Trend Comparisons**
Total U.S. for the 52 weeks ended 2/22/14

- Dollars Growth
- Volume Growth
- Average Retail Growth

At Wholesum Harvest, we’ve been growing fresh fruits and vegetables for three generations. And for the last 20 years, we’ve been providing the most nutritious and delicious all-organic produce available. Using good environmental practices to grow healthy and sustainable crops is integral to the core values of Wholesum Harvest, We are Organic to Our Roots.
**Share of Category Dollars**
Total U.S. for the 52 weeks ended 2/22/14

- Trays: 37.2%
- Side dish: 36.8%
- Meal prep: 15.2%
- Snacking: 10.8%

**Average Weekly Dollar Sales by Region**
Total U.S. for the 52 weeks ended 2/22/14

<table>
<thead>
<tr>
<th>Region</th>
<th>TOTAL</th>
<th>CENTRAL</th>
<th>EAST</th>
<th>SOUTH</th>
<th>WEST</th>
</tr>
</thead>
<tbody>
<tr>
<td>$0</td>
<td>$500</td>
<td>$1,000</td>
<td>$1,500</td>
<td>$2,000</td>
<td></td>
</tr>
<tr>
<td>dollars per store per week a year ago</td>
<td>$ sales per store per week</td>
<td>$ sales per store per week</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Household Penetration**
Total U.S. for the 52 weeks ended 2/22/14

- HH penetration YAGO: 49.9%
- HH penetration: 51.5%

**Trend Comparisons**
Total U.S. for the 52 weeks ended 2/22/14

- Dollars Growth
- Volume Growth
- Average Retail Growth
- Distribution Points
- Selling Growth

APIO OFFERS YOU THE BEST IN FRESH-CUT.

Apio continues to invest in and build platforms for success with our retailer partners.

We bring you two top selling brands from one company — Eat Smart® and GreenLine®.

Our brands offer improved category leadership with innovative products and superior sourcing all with a national reach. Carrying the best in fresh-cut just got easier.

Contact us today to learn more | www.apioinc.com | Eat Smart - 800.454.1355 | GreenLine - 419.353.2326
Household Penetration
Total U.S. for the 52 weeks ended 2/22/14

Average Weekly Dollar Sales by Region
Total U.S. for the 52 weeks ended 2/22/14

Average Basket Size
Total U.S. for the 52 weeks ended 2/22/14

Trend Comparisons
Total U.S. for the 52 weeks ended 2/22/14


HH PENETRATION YAGO
HH PENETRATION

PRODUCE
MELONS

Dollars Growth
Volume Growth
Average Retail Growth
Distribution Points
Selling Growth

Dollars Growth
Volume Growth
Average Retail Growth
Distribution Points
Selling Growth

TOTAL MELONS
WATERMELON

Consumer Perishables Databook 2014
Did you know that a watermelon can feed 3 dozen people?

Enjoy a healthy lifestyle every month of the year with the sweet taste of watermelon. Packed with vitamins A and C, the antioxidant lycopene and the amino acid citrulline, it’s great for the whole family from children to grandparents.

Look for healthy watermelon recipes your family can make together at watermelon.org.

For recipe ideas, scan here.

While many factors affect heart disease, diets low in saturated fat and cholesterol may reduce this risk.
**Share of Category Dollars**
Total U.S. for the 52 weeks ended 2/22/14

- **Organic**: 20.8%
- **Natural**: 1.0%
- **Conventional**: 78.2%

**Average Basket Size**
Total U.S. for the 52 weeks ended 2/22/14

- **Produce**
- **Organic Packaged Salad**

**Household Penetration**
Total U.S. for the 52 weeks ended 2/22/14

- **HH penetration YAGO**: 19.4%
- **HH penetration**: 21.2%

**Trend Comparisons**
Total U.S. for the 52 weeks ended 2/22/14

- **Dollars Growth**
- **Volume Growth**
- **Average Retail Growth**

In a Class of Our Own.

- 100% U.S. grown
- Private labeling
- World class products
- First class service
- Full line of premium salad blends

The Classic Salads family is proud to introduce you to a unique class of gourmet baby greens. Available in a variety of retail pack sizes as well as private label and custom blends, our premium products and personalized service will put you at the top of your class in the produce department.

To learn more, visit ClassicSalads.com | 831.763.4520
They can increase your profitability through category management. Provide you the latest market data, food trends and promotional materials. Even help educate buyers new to the category. Impossible?

Not for our fearless field force.