

# 2014 CONSUMER PERISHABLES DATABOOK

Hot topics | Demographic differences | Product usage | Retail performance



PRODUCE



BAKERY



SEAFOOD



MEAT



DELI

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# 2014 CONSUMER PERISHABLES DATABOOK

## 6 Cooking trends drive fresh growth

Global influences and multicultural products are contributing to increased sales.

## 12 Information & Methodology

### 14 BAKERY DEPARTMENT

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

### 22 MEAT DEPARTMENT

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

### 38 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.

### 44 SEAFOOD DEPARTMENT

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

### 62 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.

#### EDITORIAL

SETH MENDELSON  
Publisher/Editorial Director

CRAIG LEVITT  
Managing Editor

RICHARD TURCSIK  
Executive Editor

ELIZABETH LOUISE HATT  
Senior Editor

MOLLY ZIMNOCH  
Associate Editor

#### SALES

STEVEN P. WERNER  
Associate Publisher  
(847) 991-1548

RANDELL HAMMETT  
Associate Publisher  
(847) 234-2927

MICHAEL WEINREICH  
Sr. Director of Advertising  
(732) 972-8324

RANDELL AND RUTH  
SCHNEIDER  
Western States Sales Office  
(208) 853-4560

#### ART & PRODUCTION

MAUREEN MILLS  
Senior Art Director

NICOLE MONTILLA  
Production Manager

## GROCERY HEADQUARTERS

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333 SEVENTH AVE., 11TH FLOOR NY, NY 10001  
TEL: 646-274-3525 FAX: 646-674-0102

## 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 Surimi

### 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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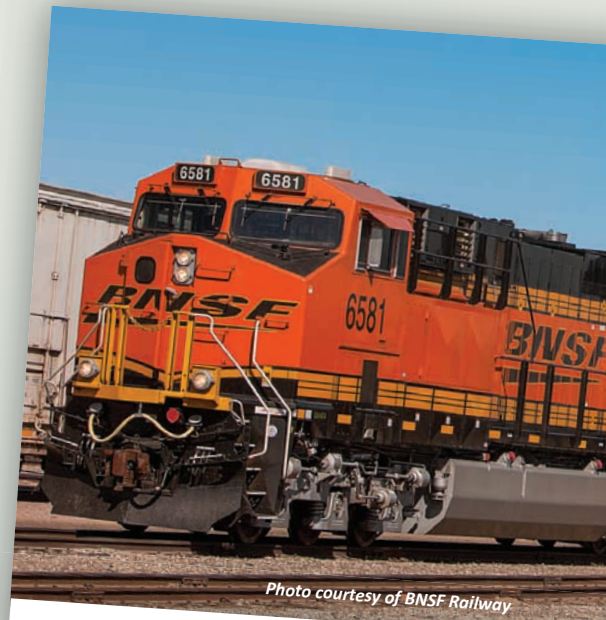


Photo courtesy of BNSF Railway

**TransCold Express:** BNSF dedicated, bi-directional refrigerated 50-boxcar unit train between California Central Valley and the Midwest and beyond.





# COOKING TRENDS DRIVE FRESH GROWTH

Global influences and multicultural products contribute to increased sales.

{BY CARA AMMON}

**C**ONSUMERS 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 multicultural or globally 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 macada-



mia 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.

## Fresh food growth

|         | DOLLAR GROWTH | VOLUME GROWTH |
|---------|---------------|---------------|
| Bakery  | 4.8%          | 3.9%          |
| Deli    | 5.4%          | 4.3%          |
| Meat    | 3.5%          | 1.3%          |
| Produce | 7.3%          | 3.2%          |
| Seafood | 5.7%          | 0.9%          |

## How much are consumers buying?

|         | AVG. ITEM COUNT (PER STORE/WEEK) | % CHANGE |
|---------|----------------------------------|----------|
| Bakery  | 311                              | 3.1%     |
| Deli    | 494                              | 3.3%     |
| Meat    | 762                              | 1.4%     |
| Produce | 683                              | 5.8%     |
| Seafood | 109                              | 1.9%     |

## The cost of fresh

|         | AVG. RETAIL PRICE | % CHANGE |
|---------|-------------------|----------|
| Bakery  | \$2.86            | 0.8%     |
| Deli    | \$4.86            | 1.1%     |
| Meat    | \$3.19            | 2.2%     |
| Produce | \$1.45            | 4.0%     |
| Seafood | \$6.31            | 4.8%     |

## Promotional dollars

|         | DOLLARS % ON PROMOTION | DOLLARS % ON PROMOTION YR AGO |
|---------|------------------------|-------------------------------|
| Bakery  | 14.2%                  | 14.2%                         |
| Deli    | 15.1%                  | 15.6%                         |
| Meat    | 23.7%                  | 24.7%                         |
| Produce | 20.0%                  | 20.5%                         |
| Seafood | 23.3%                  | 24.9%                         |

Source: Nielsen Perishables Group Fresh Facts, total U.S. 52 weeks ended February 22





# SOME GOOD BUZZ ABOUT THIS YEAR'S NY APPLE CROP

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!

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*Photos courtesy of Mark Seetin, US Apple Association*



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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 consum-

ers 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](http://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.

Contact the Nielsen Perishables Group for more information:

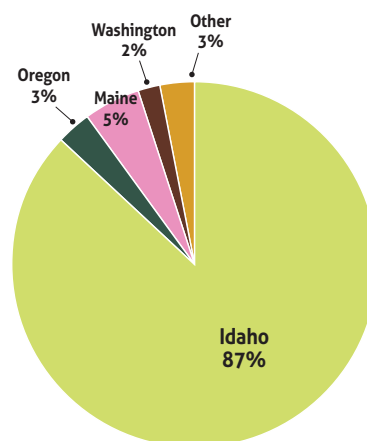
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#### FRESHFACTS® SHOPPER INSIGHTS POWERED BY SPIRE, A DATALOGIX COMPANY

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.

### WHAT STATE PRODUCES THE BEST POTATOES?

Source: Grocery Headquarters survey of 800 consumers taken April 27 to May 11.





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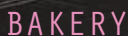
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By targeting key households, innovating to meet consumers' needs and implementing an effective promotional strategy retailers can continue to win sales.

**A**LTHOUGH 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. Shop-

pers 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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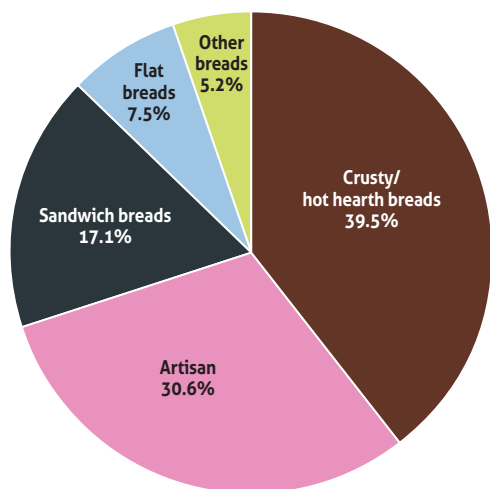
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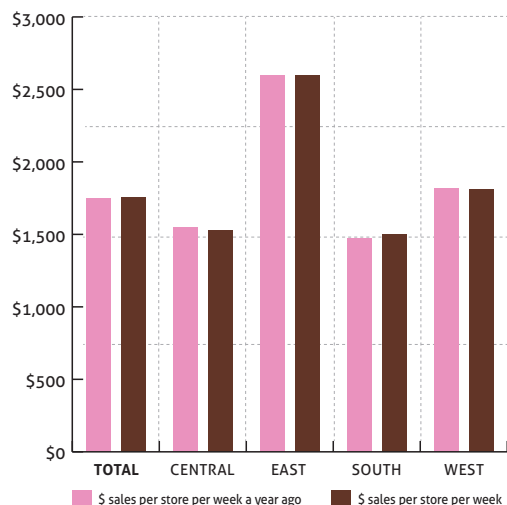
## Share of Category Dollars

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



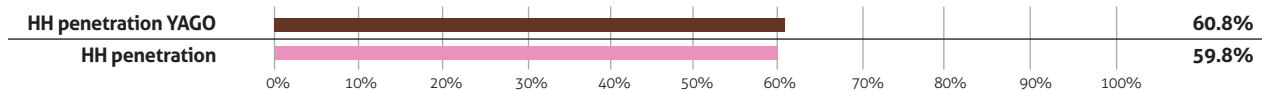
## Average Weekly Dollar Sales by Region

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



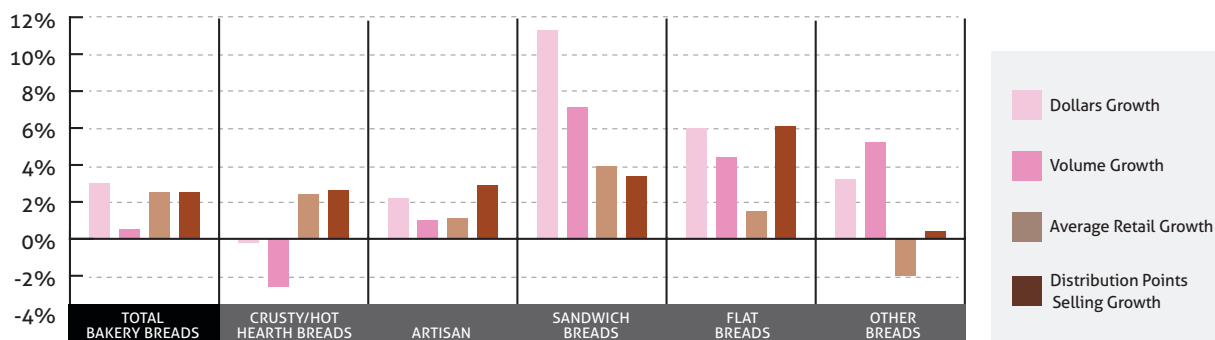
## Household Penetration

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



## Trend Comparisons

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







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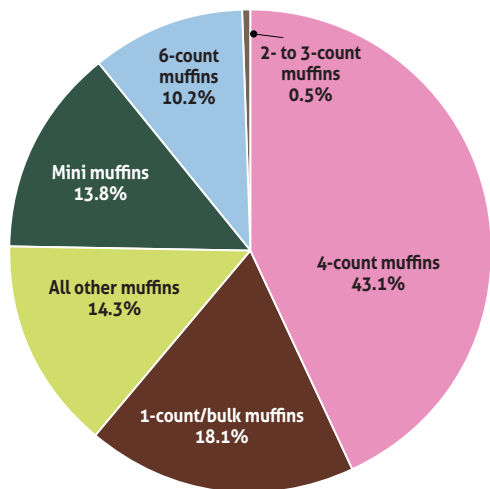
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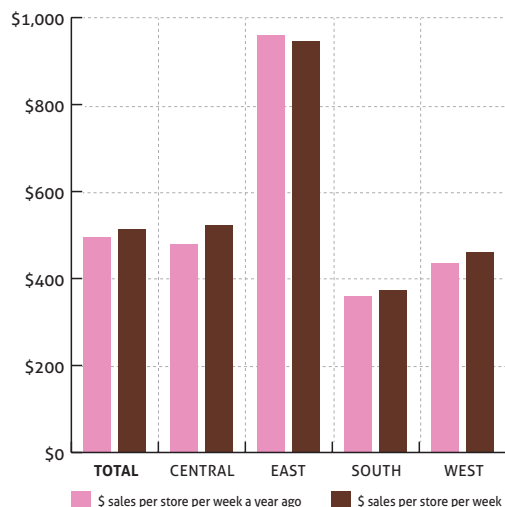
## Share of Category Dollars

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



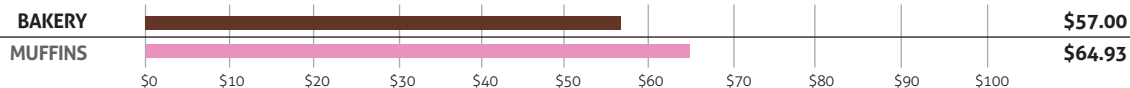
## Average Weekly Dollar Sales by Region

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



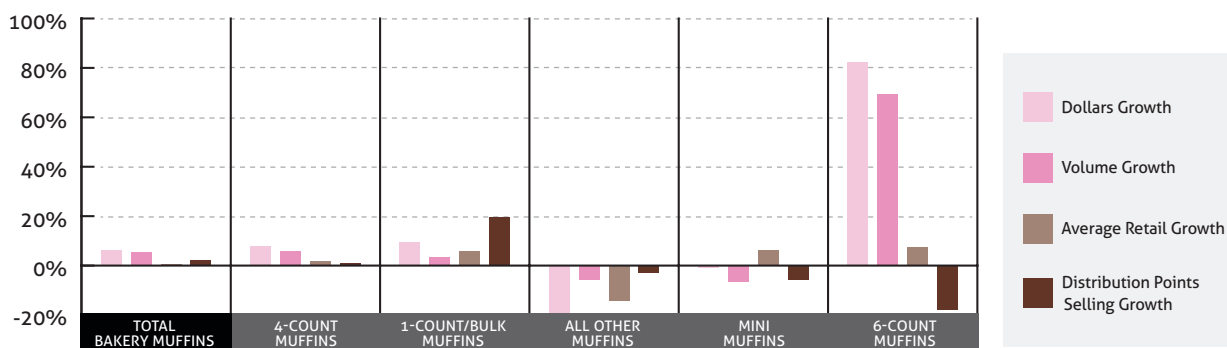
## Average Basket Size

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



## Trend Comparisons

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





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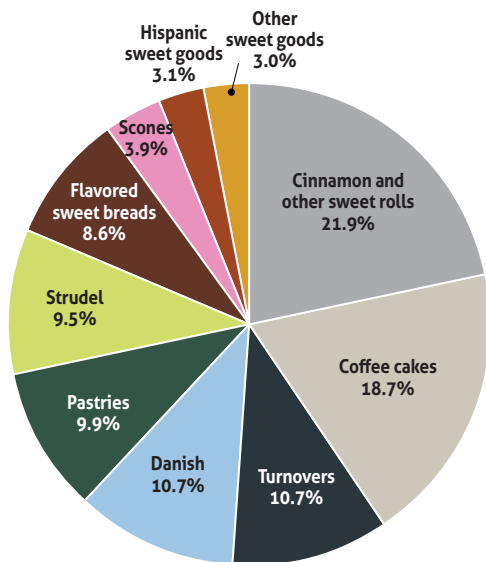
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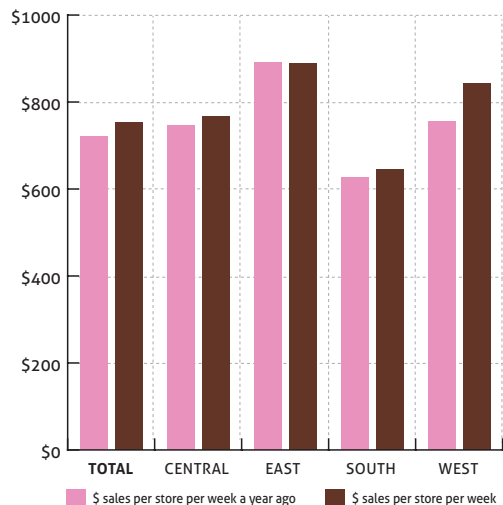
## Share of Category Dollars

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



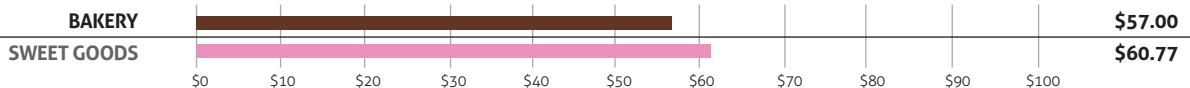
## Average Weekly Dollar Sales by Region

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



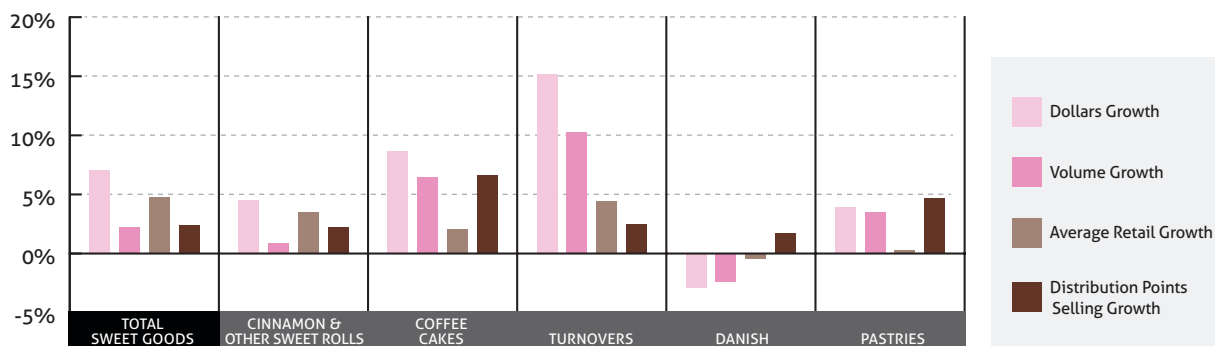
## Average Basket Size

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



## Trend Comparisons

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








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MEAT

# 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}

AS THE LARGEST OF THE FIVE FRESH DEPARTMENTS, the meat department is an important component of both fresh and total store success. During the latest 52 weeks ended February 22, the meat department increased dollar sales 4% and volume 1%. However, this growth was slower in comparison to the other fresh departments, and can be partially attributed to continued consumer concern over rising meat prices.

During the tracked period, shoppers spent \$14.47 per trip in the meat department, the most of any fresh department. The average shopper basket containing meat was \$62.83.

Fresh meat is the main driver of department sales, comprising 62.2% of dollars. Fresh beef represents more than half of fresh meat dollars. Despite high sales, beef grew at a slower-than-average rate. As consumers become wary of rising beef prices, many have begun to stray from traditional cuts to more affordable and flavorful alternatives. This trend is evident when looking at category growth. During the latest 52 weeks, shank, brisket, plate and flank had the strongest dollar growth, up 6.9% and 7%, respectively. Traditional cuts like sirloin and round maintained steady sales compared to the prior year despite

increased pricing.

The largest driver of fresh meat dollar growth during this period was chicken, which increased 6.8% compared to the prior year. Although chicken breasts made up the majority of fresh chicken sales, consumers have increasingly be-



come attracted to lower-priced options. Chicken thighs and chicken combo packs were among the fastest growing varieties, with thighs (\$1.80 per pound) growing dollars 12.2% and combo packs (\$1.45 per pound) gaining 21.5%. In comparison, chicken breasts sold for \$2.82 per pound.

While most fresh meat categories maintained steady volume sales due to price increases, lamb and pork decreased prices, helping to grow volume. Lamb posted the strongest volume growth

among fresh meat, up 4.6%. With a low price per pound compared to other cuts, shoulder butt drove volume growth for the pork category, far outpacing growth of the largest sub-category, loin.

Representing 27.1% of department dollars, processed meat is an important component of meat department sales. Processed meat increased dollars 2.6%, led by bacon, the largest sub-category. Bacon grew 13.1% in dollars compared to the previous year; however, growth was driven by steep price increases of 12.3%.

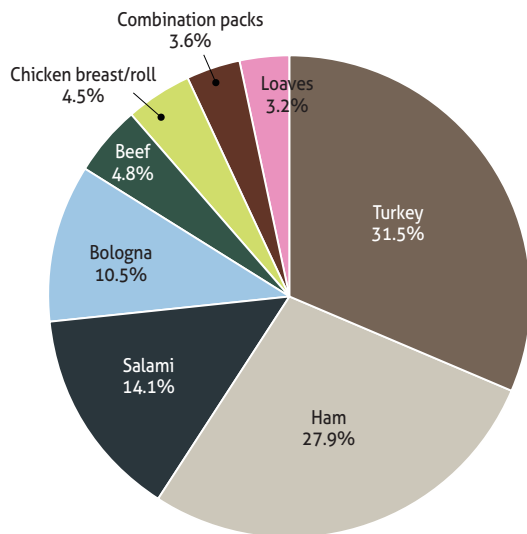
Fully cooked meat, a smaller contributor to the meat department, posted strong growth, increasing dollars by 5%, with all varieties growing except fully cooked turkey. Fully cooked chicken represented the majority of sales, but fully cooked beef and stir fry/fajita strips had the strongest growth, increasing 8% and 11.9%, respectively.

While still a small part of total meat sales, natural and organic products have seen strong growth in the meat department. Despite the lack of clarity over natural labeling, natural meat has grown 9.8% in dollars. Organic also continues to grow, up 26.7% in dollar sales. Other health claims seeing growth in the meat department are grass-fed, antibiotic free and vegetarian fed. ◀◀



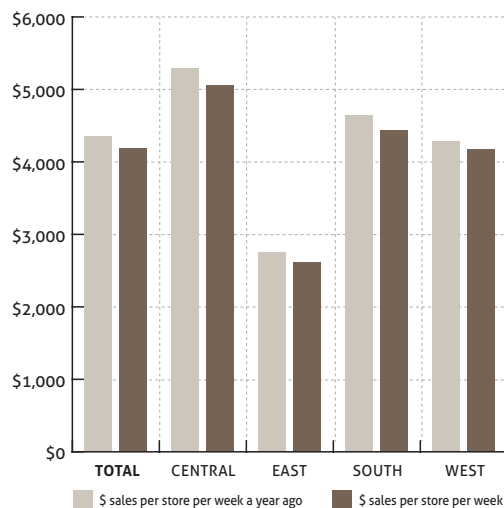
## Share of Category Dollars

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

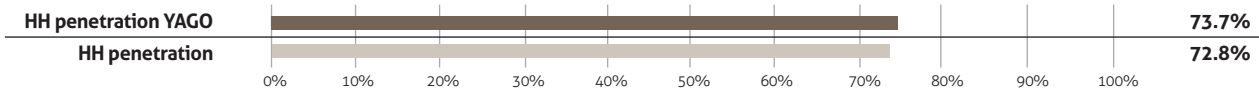


## Average Weekly Dollar Sales by Region

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

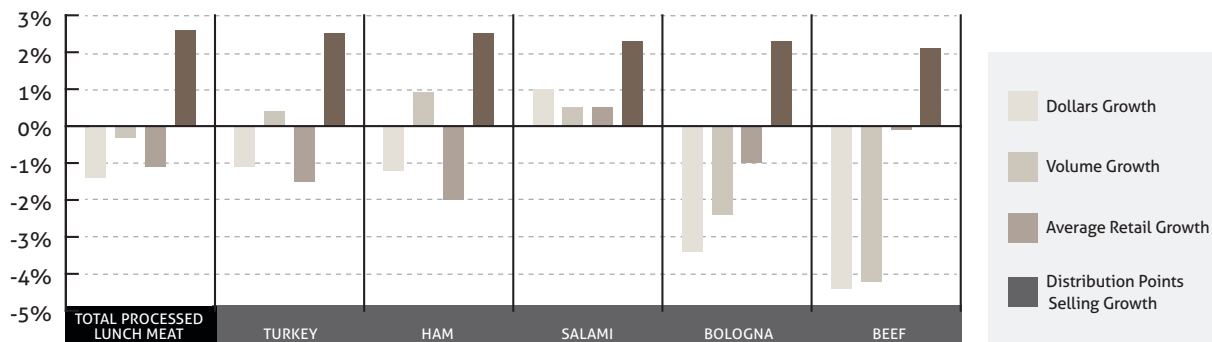


## Household Penetration Total U.S. for the 52 weeks ended 2/22/14

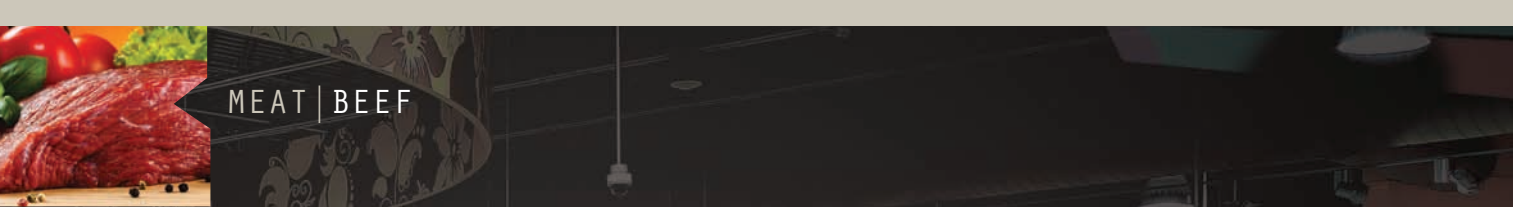


## Trend Comparisons

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



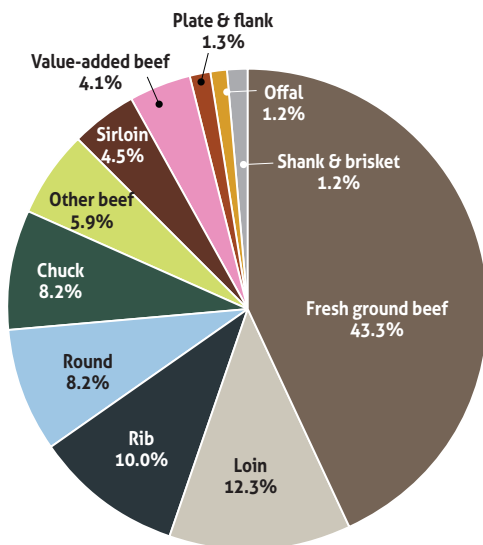




## MEAT | BEEF

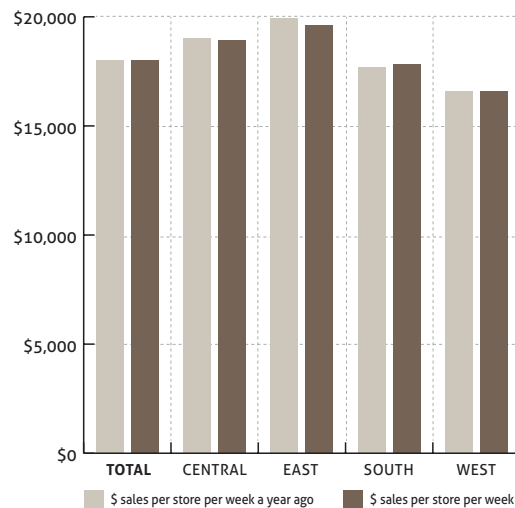
### Share of Category Dollars

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

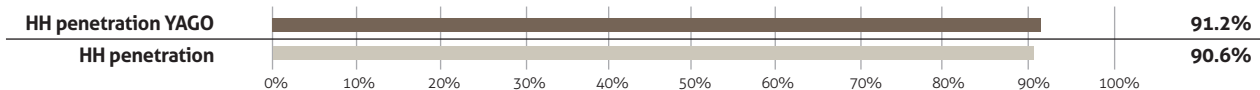


### Average Weekly Dollar Sales by Region

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

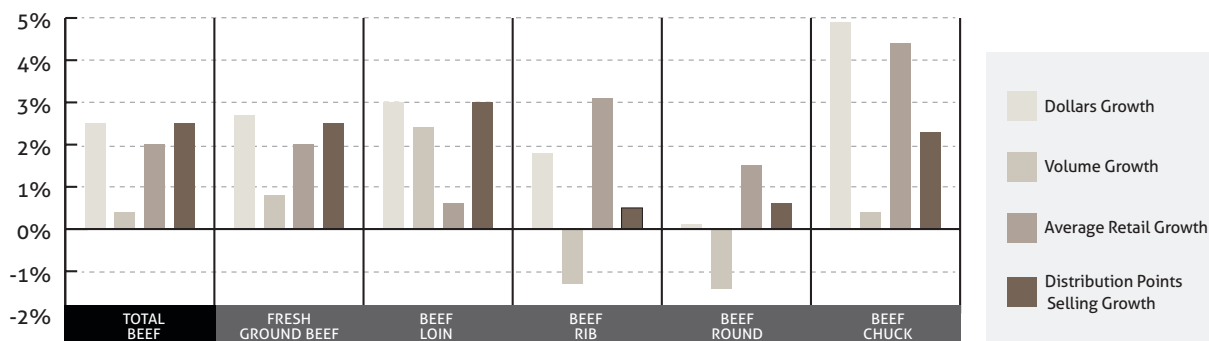


### Household Penetration Total U.S. for the 52 weeks ended 2/22/14



### Trend Comparisons

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





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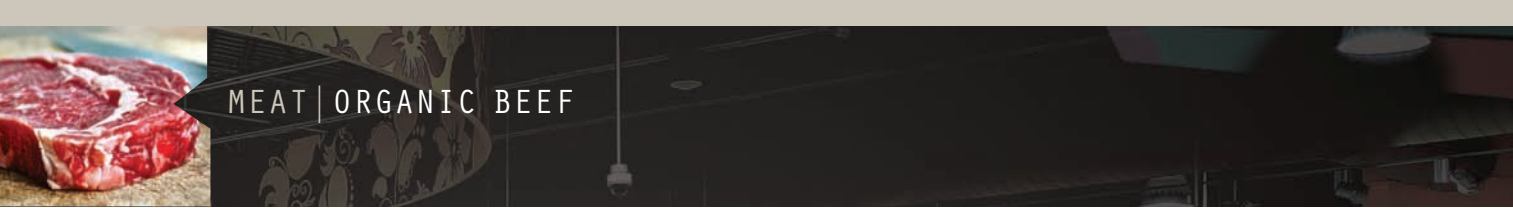
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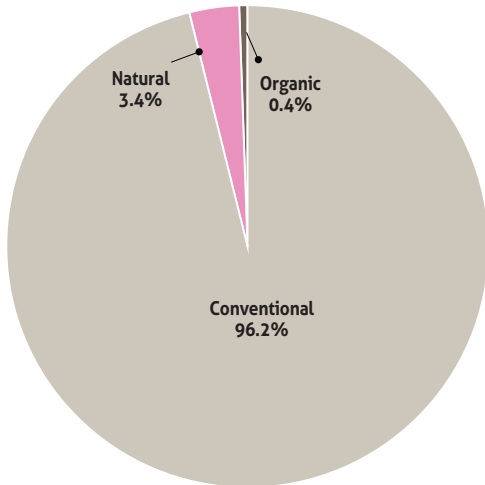




# MEAT | ORGANIC BEEF

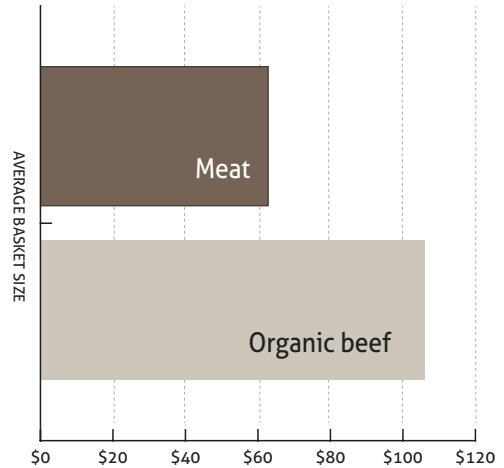
## Share of Category Dollars

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



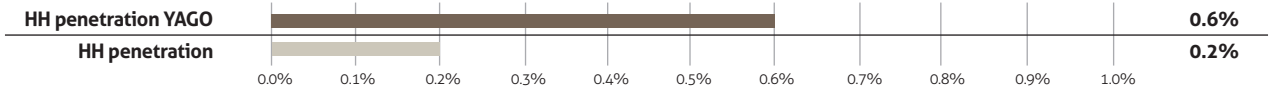
## Average Basket Size

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



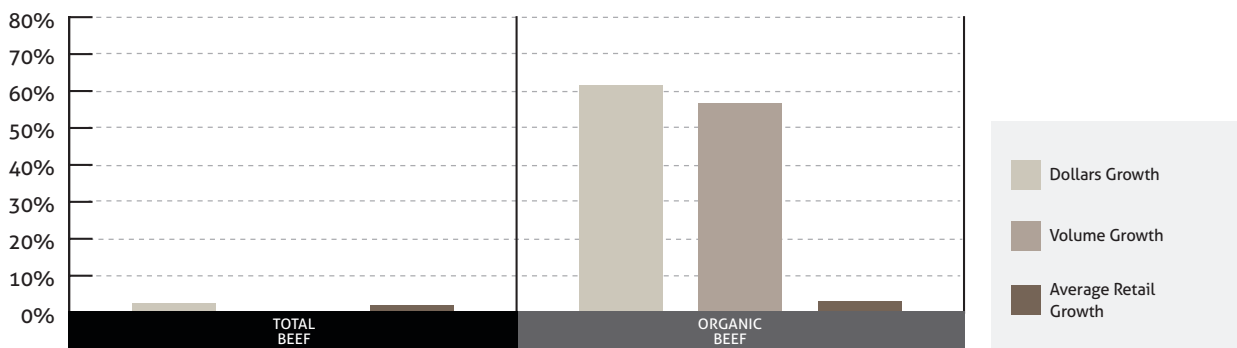
## Household Penetration

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



## Trend Comparisons

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



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 Spire, a Datalogix company.





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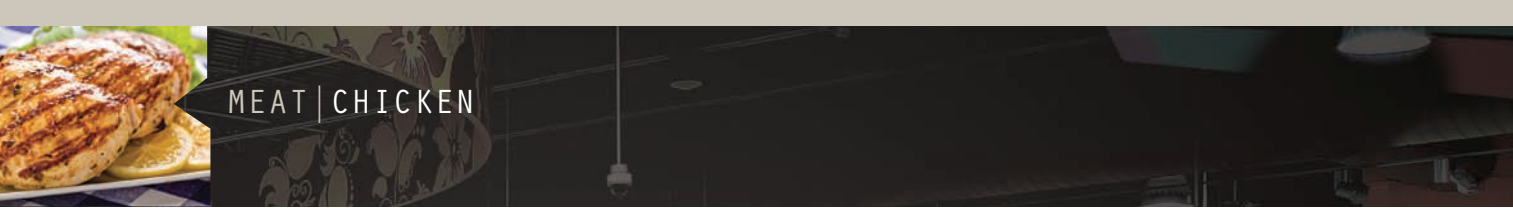
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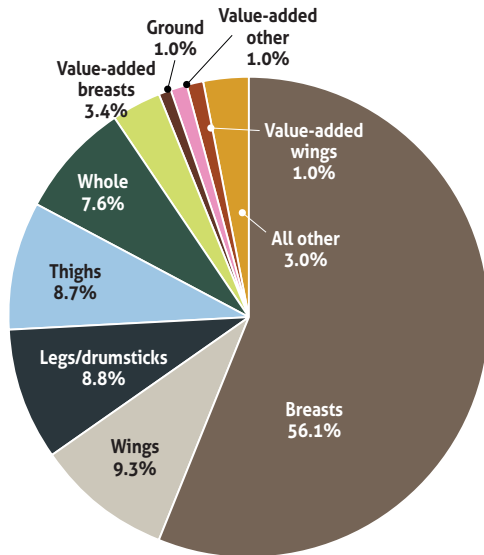




# MEAT | CHICKEN

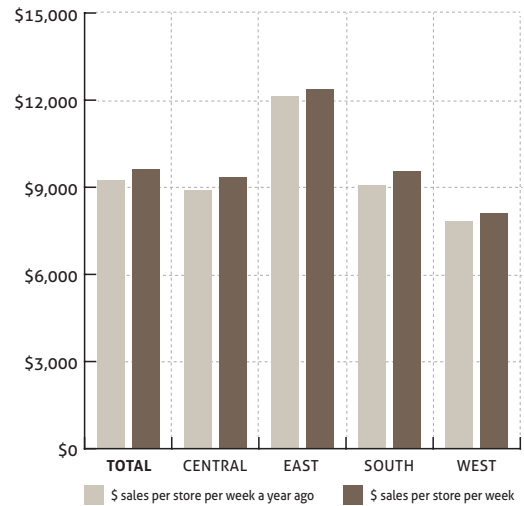
## Share of Category Dollars

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



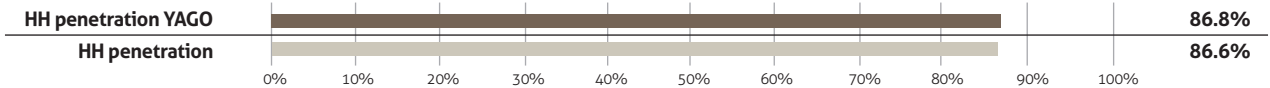
## Average Weekly Dollar Sales by Region

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



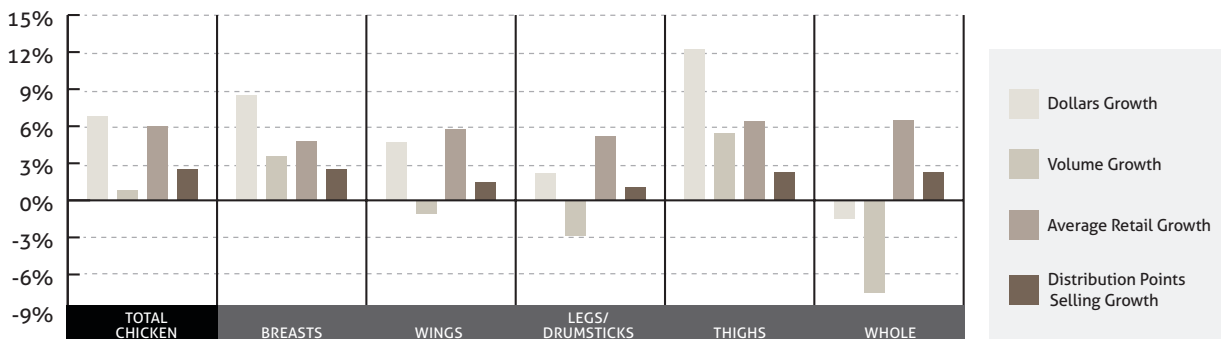
## Household Penetration

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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\*SOURCE: Nearly 15 years of customer results.

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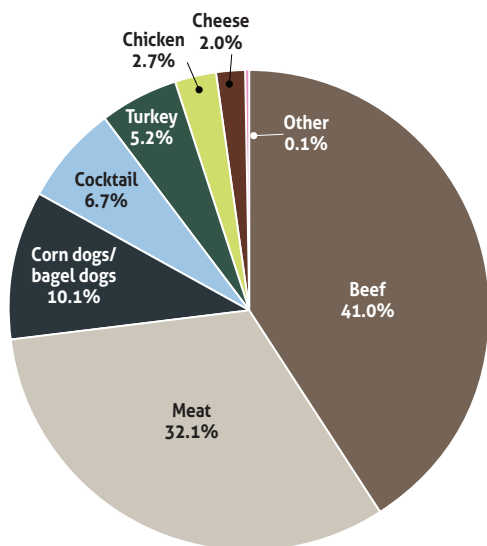




## MEAT | FRANKFURTERS

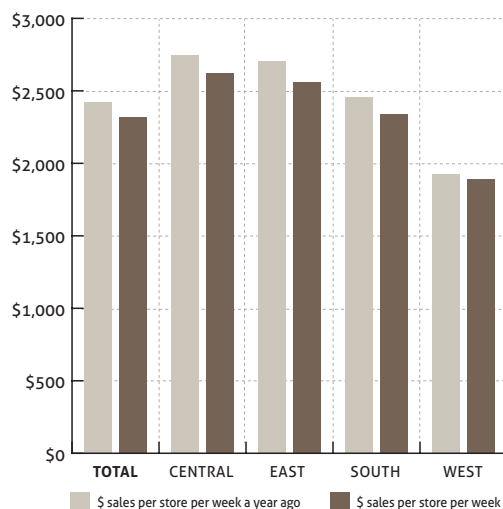
### Share of Category Dollars

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

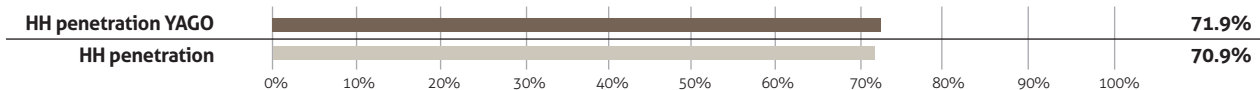


### Average Weekly Dollar Sales by Region

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

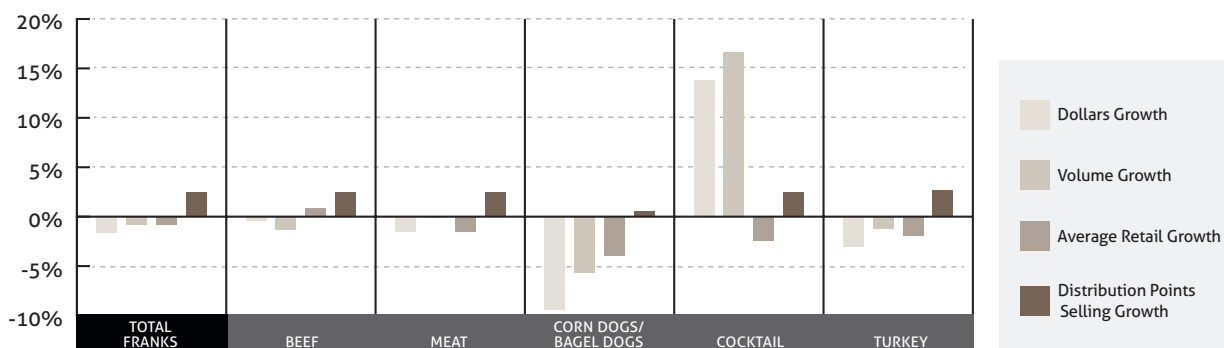


### Household Penetration Total U.S. for the 52 weeks ended 2/22/14



### Trend Comparisons

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



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 Spire, a Datalogix company.





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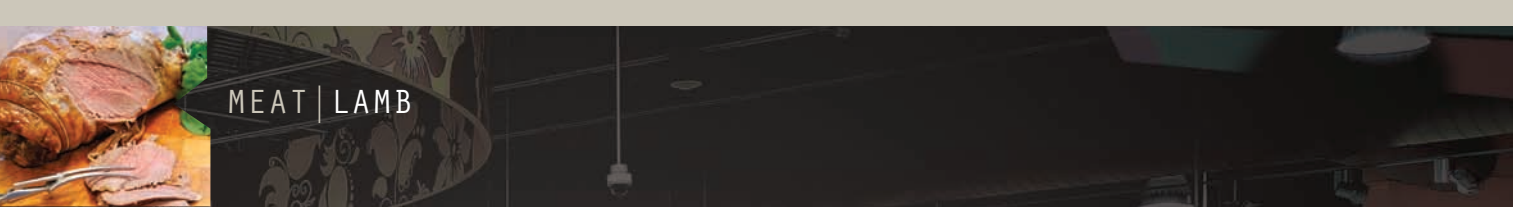


Source: IRI Infoscan - Total U.S. MultiOutlet - Data Ending 4/13/13

<sup>1</sup>Sales Trend using Dollar Sales during 52 Weeks Ending 4/13/14 vs. 52 Weeks ending 4/17/11

<sup>2</sup>Sales velocity calculated as Dollars Sold per Average Weekly Total Point of Distribution over 52 weeks ending 4/13/14, comparing Nathan's Famous brand vs. total hot dog category average

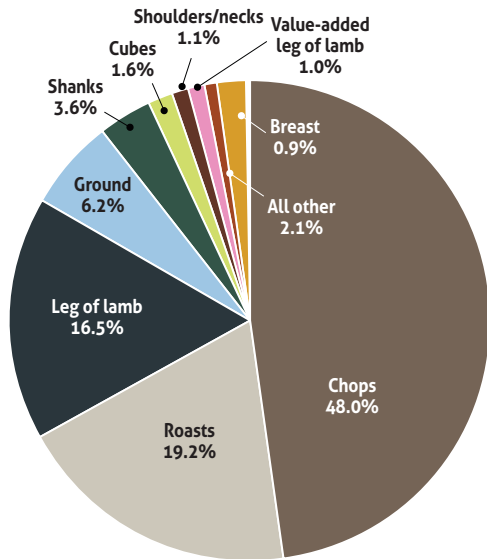




# MEAT | LAMB

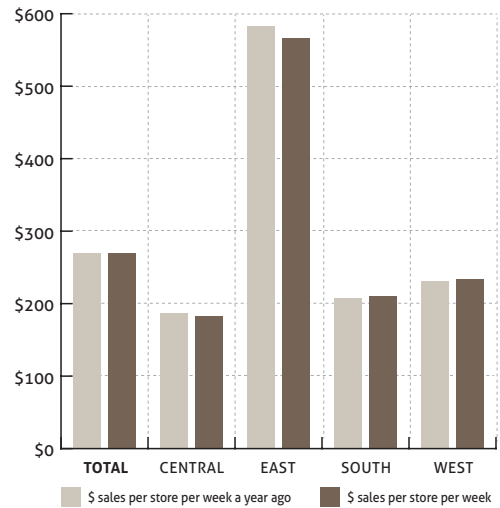
## Share of Category Dollars

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



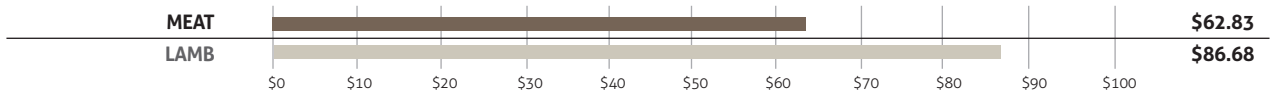
## Average Weekly Dollar Sales by Region

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



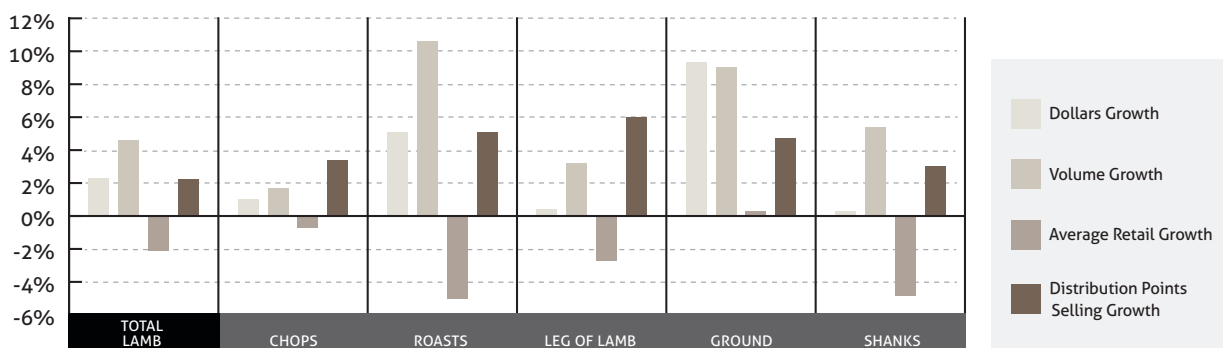
## Average Basket Size

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



## Trend Comparisons

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





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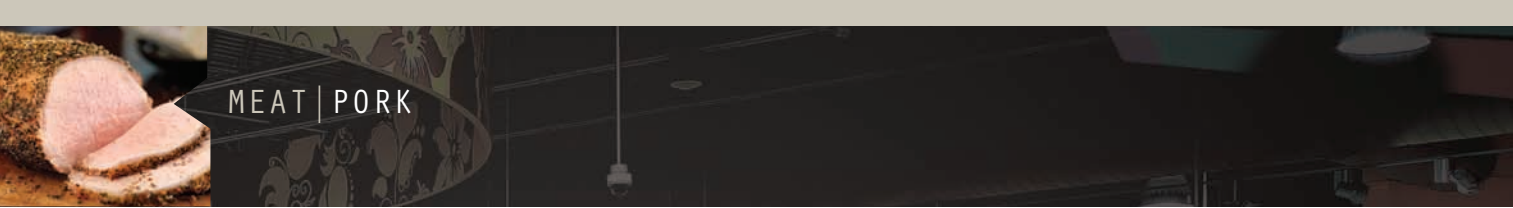


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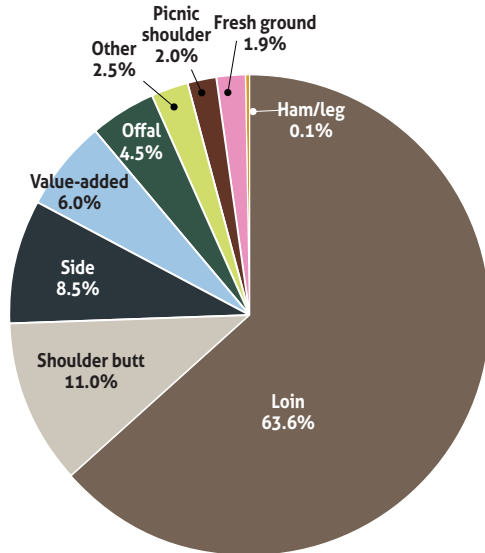
photo courtesy of the American Lamb Board





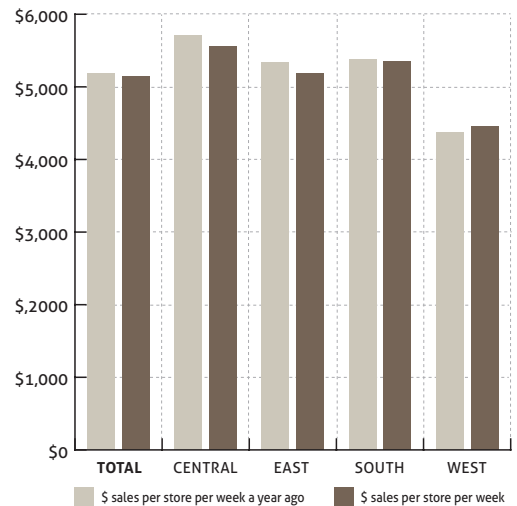
## Share of Category Dollars

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

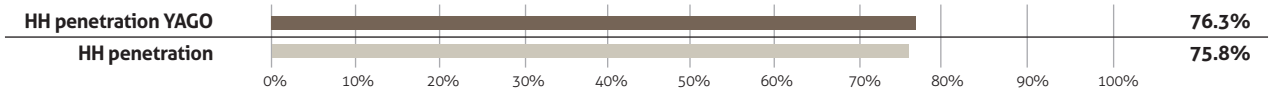


## Average Weekly Dollar Sales by Region

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

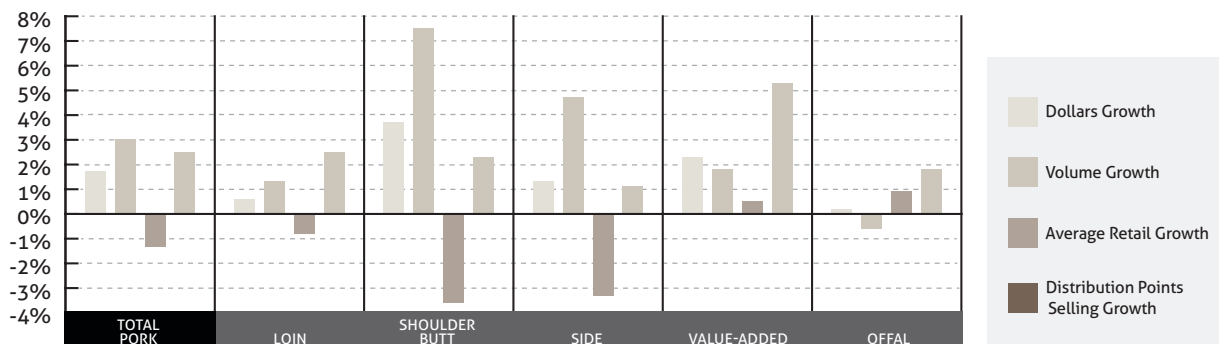


## Household Penetration Total U.S. for the 52 weeks ended 2/22/14



## Trend Comparisons

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







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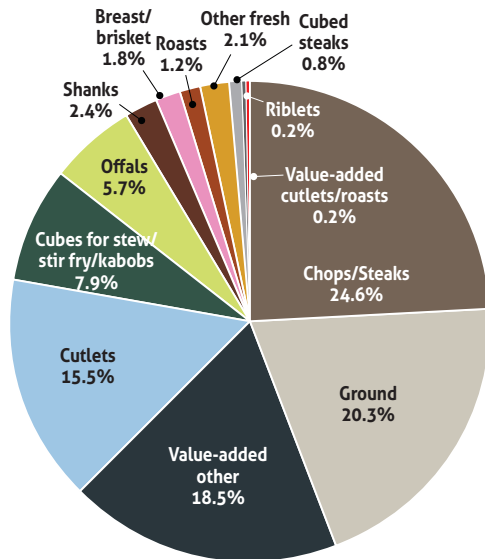
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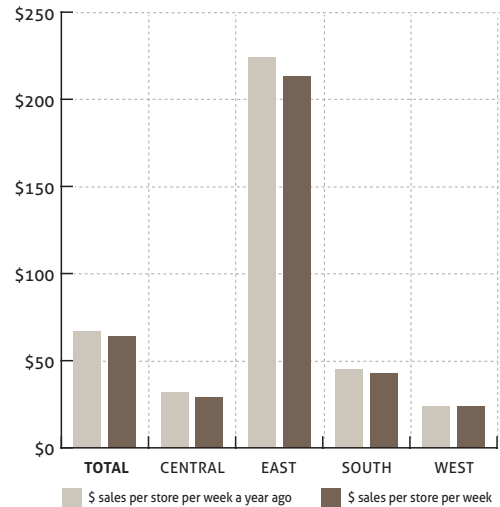
## Share of Category Dollars

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



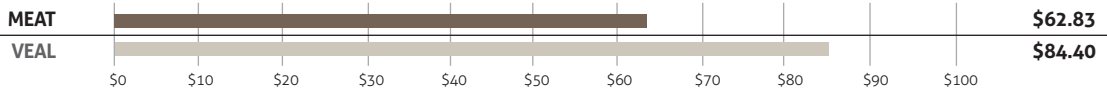
## Average Weekly Dollar Sales by Region

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



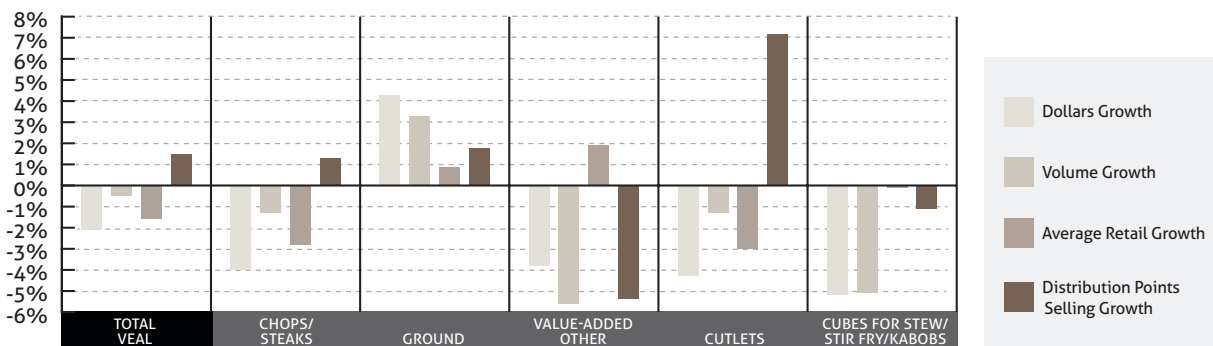
## Average Basket Size

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



## Trend Comparisons

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





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DELI

# 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}

**T**HE DELI DEPARTMENT is becoming increasingly valuable to shoppers, both in prepared and non-prepared categories. This evolution of the in-store deli continued to drive department growth. Many retailers are overhauling their formats to more closely resemble foodservice and are improving product quality, often placing grocers in direct competition with foodservice. While foodservice-type offerings continue to drive deli sales upward, established categories are also contributing to department growth.

During the 52 weeks ended February 22, deli department dollar and volume sales increased 5% and 4%, respectively. This was the highest volume growth among the five fresh departments nationally. Dollar growth in the deli was third behind seafood and produce, and everyday pricing in the deli experienced minimal increases. The department also continued to expand offerings, increasing unique items selling on store shelves 3% compared to the previous year.

The deli department maintains a wide reach across the U.S. with 94% of households purchasing deli products throughout the year. Deli shoppers spend an average of \$8.58 per trip on

deli products and make 15 trips to the deli per year. These shoppers are valuable across the store—shoppers spend \$61.29 when a deli product is in the basket. This basket ring is second only to the seafood basket.



Deli meat and deli cheese are two established categories that experienced dollar gains during the latest 52 weeks, up 3% each. Consumers are using deli meat and cheese to supplement gourmet foodservice in the comfort of their homes, demonstrated by growth in deli specialty meat and deli specialty cheese. Deli specialty meat increased dollar and volume sales 10% and 9%, respectively.

The major source of department innovation and convenience trends is deli prepared, where sales of products

like deli prepared chicken, deli entrées and deli sides continue to climb. In fact, each of the 15 deli prepared categories increased dollars and volume during the latest 52 weeks. Overall, deli prepared foods increased dollar and volume sales 7.3% and 6.1%, respectively.

Deli prepared chicken, despite being an established category, continues to experience dollar growth, up 9% versus the previous year. Retailers are expanding offerings beyond the basic rotisserie chicken to include flavor options like Italian and barbeque-flavored chicken. It is not just main-dish products posting growth in deli-prepared. Deli sides increased dollar sales 12% compared to the previous year, as consumers seek quick options

to complete their meals. Retailers have responded to this demand—the number of unique deli side items selling on store shelves also increased compared to the previous year.

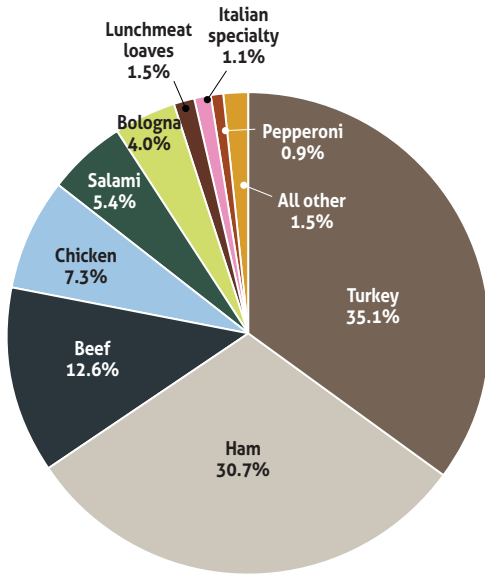
Retailers are also catering to multiple eating occasions throughout the day. Deli breakfast food dollar sales grew 8% as shoppers look to the deli for quick, quality morning meals. Breakfast sandwiches, French toast, pancakes, waffles and omelets are among the fastest growing breakfast foods.





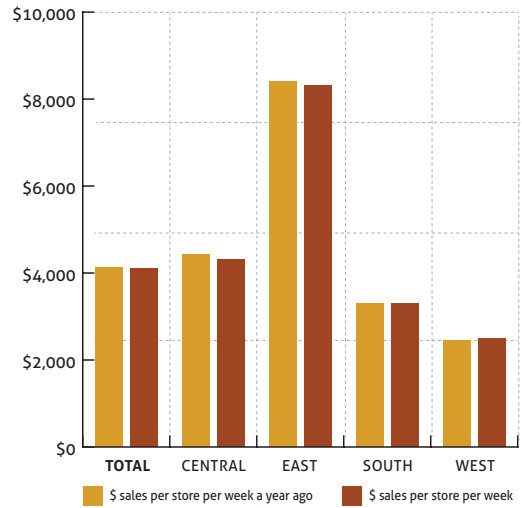
### Share of Category Dollars

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



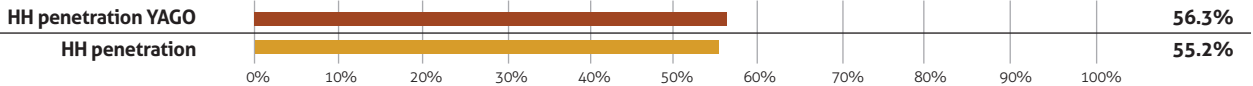
### Average Weekly Dollar Sales by Region

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



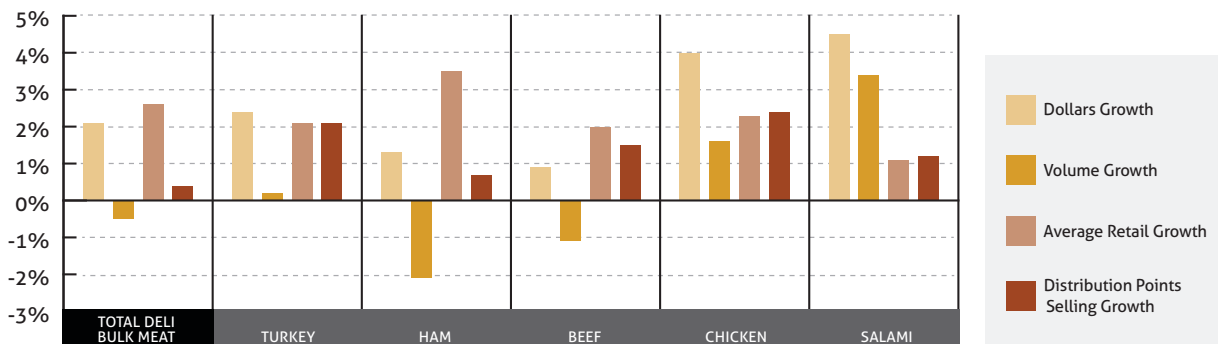
### Household Penetration

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



### Trend Comparisons

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

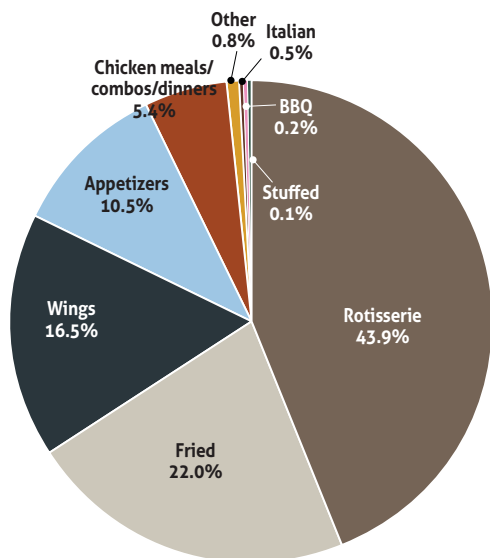




## DELI | PREPARED CHICKEN

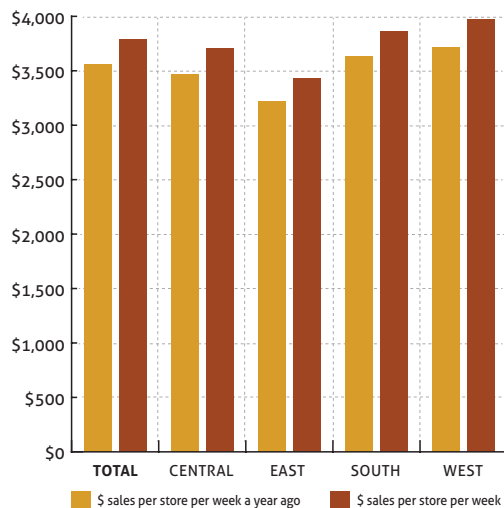
### Share of Category Dollars

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

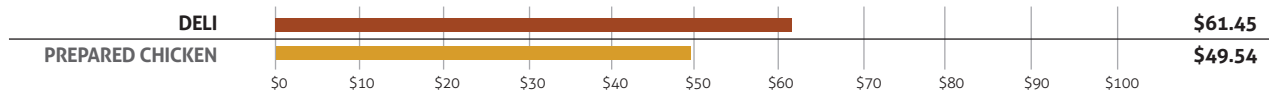


### Average Weekly Dollar Sales by Region

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

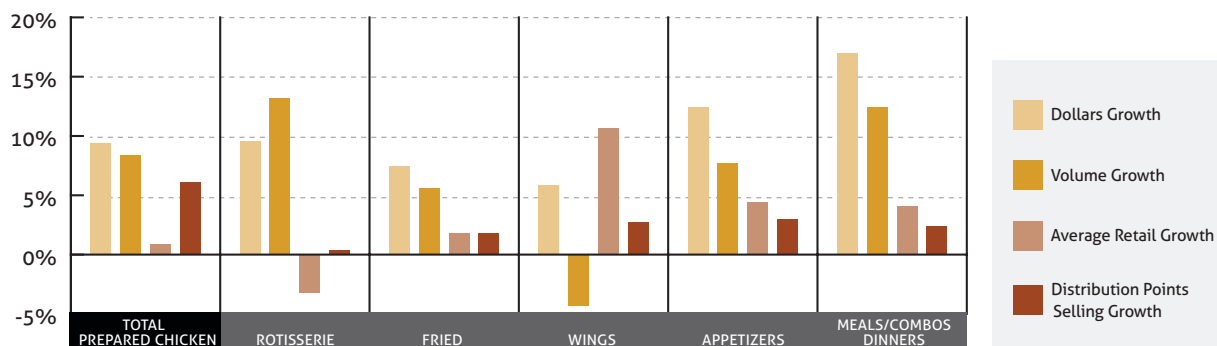


### Average Basket Size Total U.S. for the 52 weeks ended 2/22/14



### Trend Comparisons

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

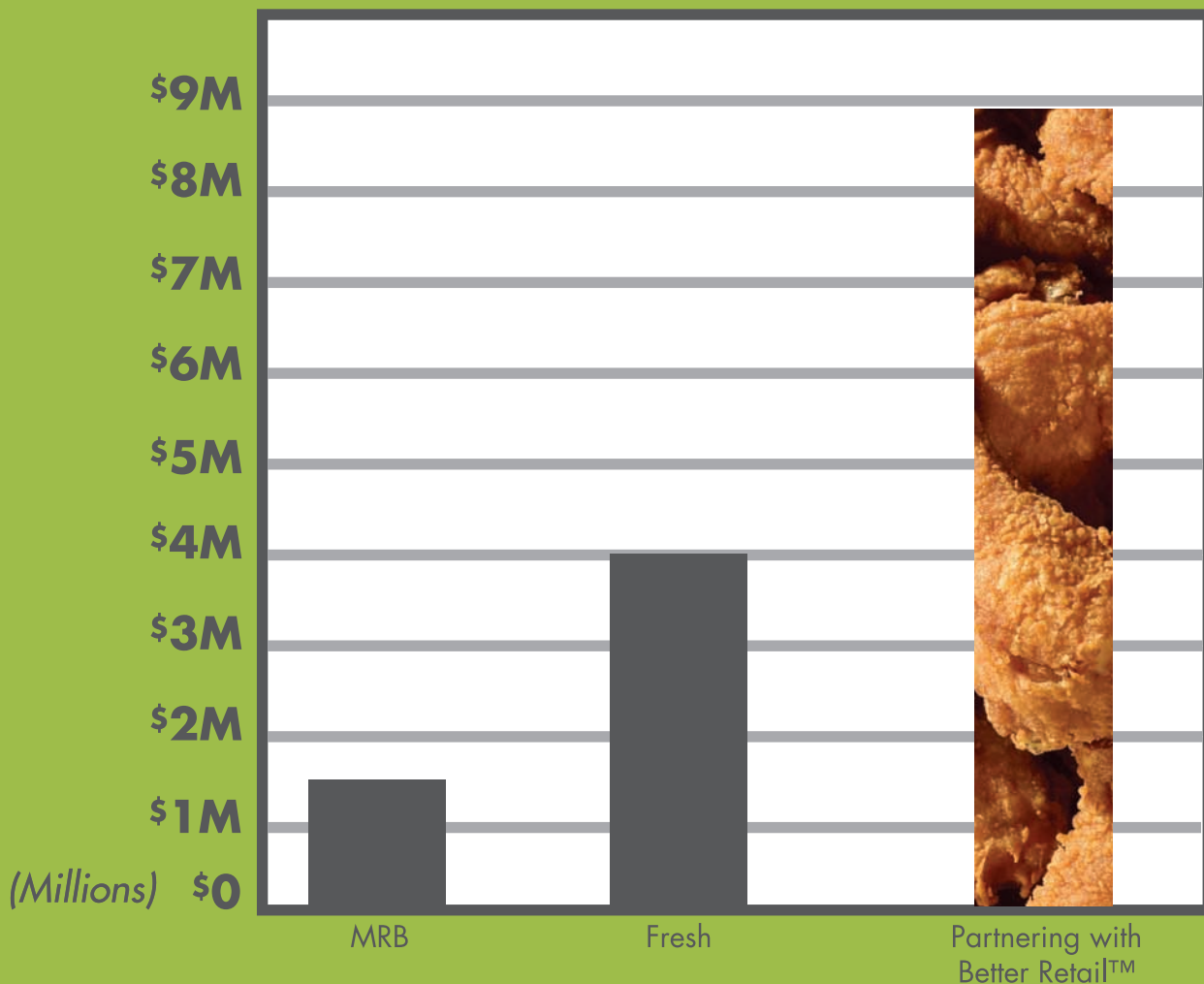




One good reason to look at your current fried chicken program?

# WE CAN PROVIDE MILLIONS

## 100-store chain annual projected sales



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**<sup>™</sup>

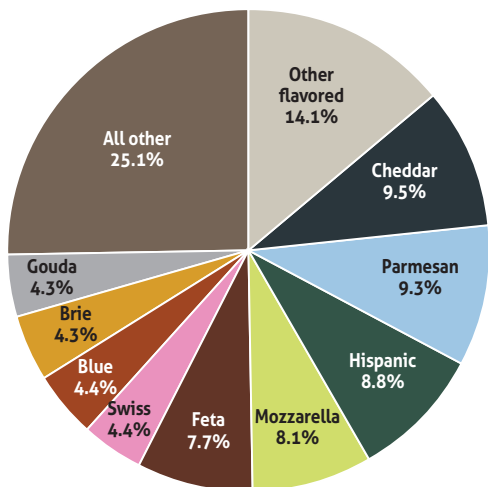
Food Programs Division

[www.betterretail.com](http://www.betterretail.com)



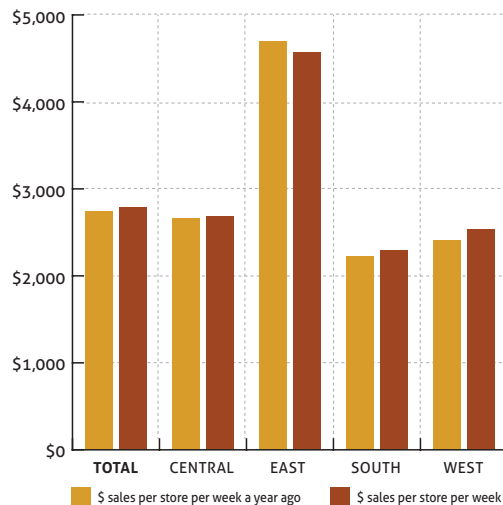
## Share of Category Dollars

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

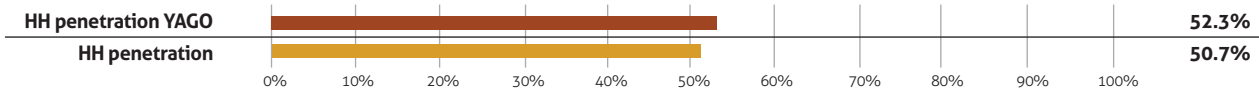


## Average Weekly Dollar Sales by Region

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

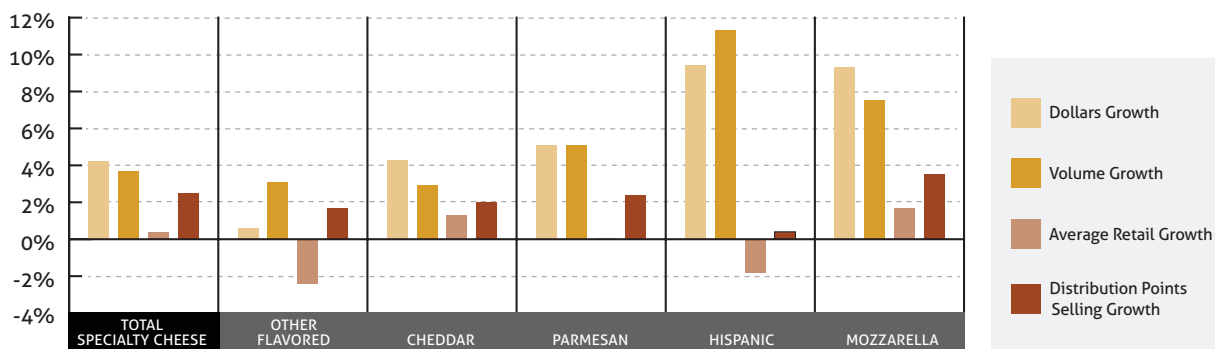


## Household Penetration Total U.S. for the 52 weeks ended 2/22/14



## Trend Comparisons

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





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.**



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# 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 }

**S**EAFOOD 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

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. ◀▶



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.



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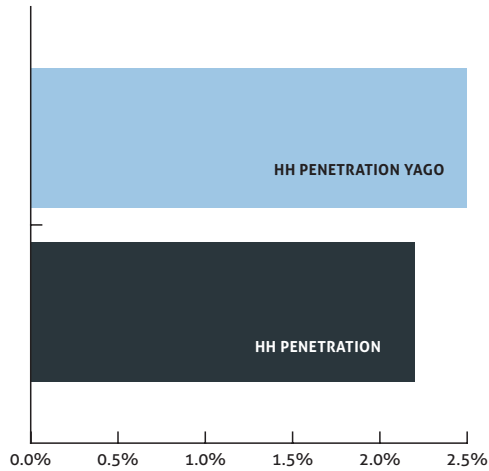
Nielsen Perishables Group Data – Point-of-sale charts: Nielsen Perishables Group FreshFacts®; Purchase Frequency and Basket Size charts: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, a Datalogix company.





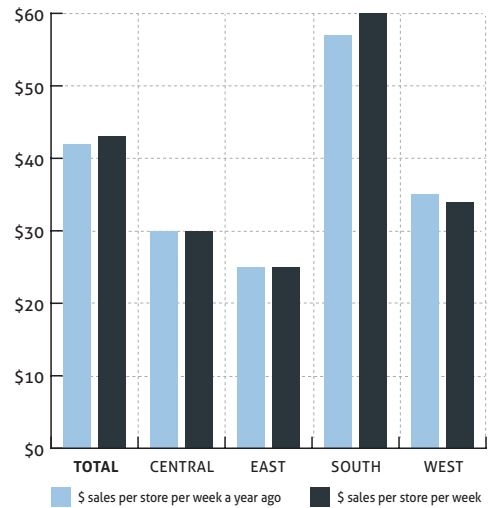
### Household Penetration

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



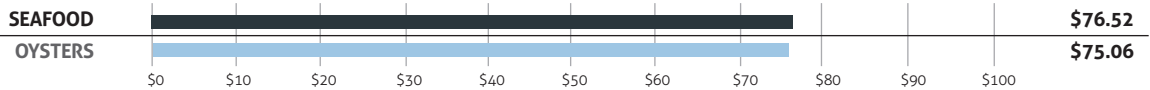
### Average Weekly Dollar Sales by Region

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



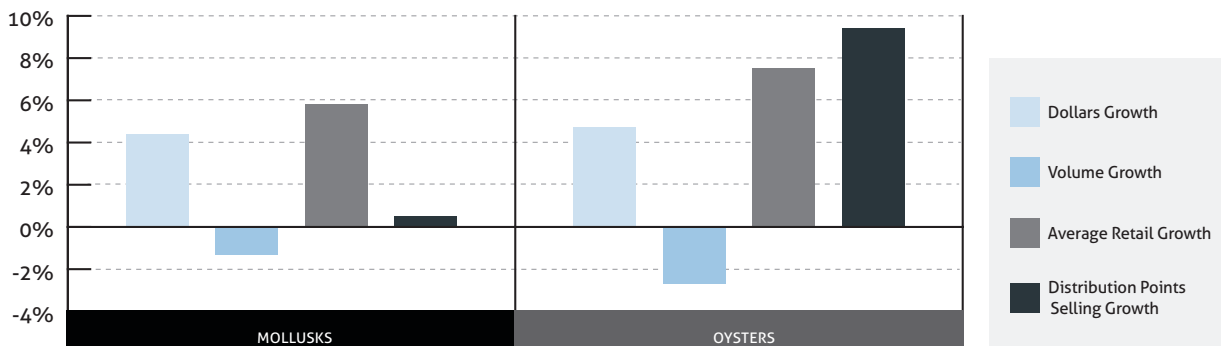
### Average Basket Size

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



### Trend Comparisons

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

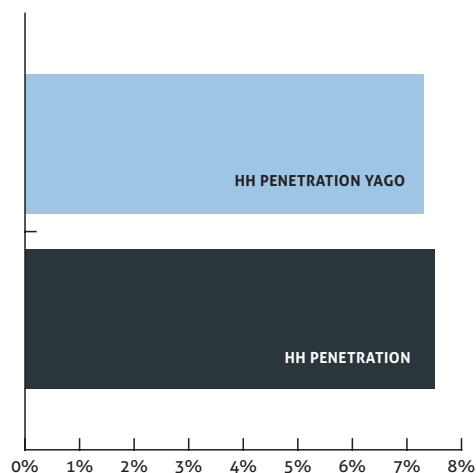






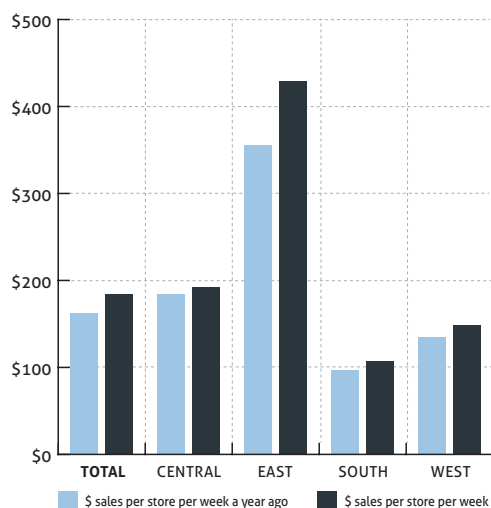
## Household Penetration

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



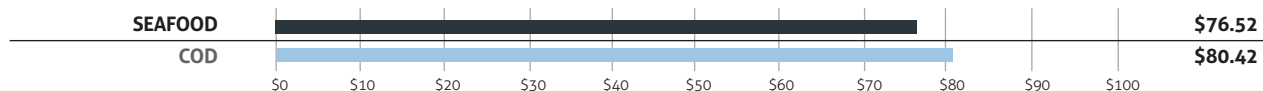
## Average Weekly Dollar Sales by Region

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



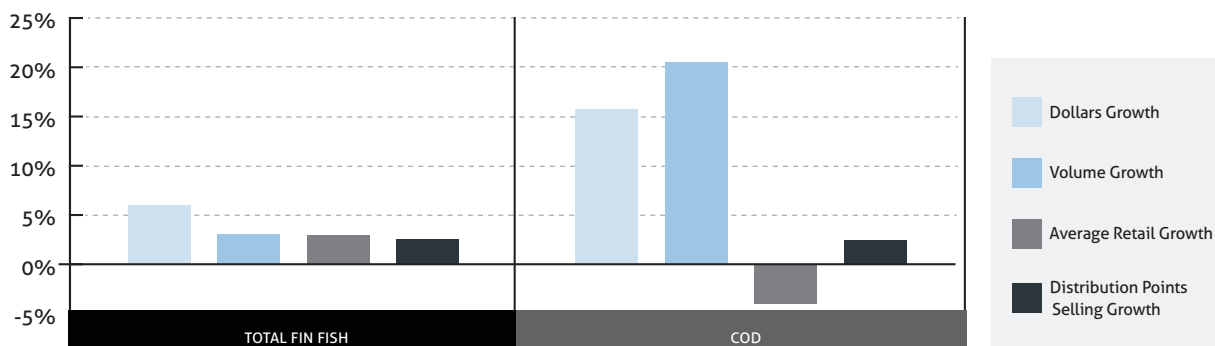
## Average Basket Size

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



## Trend Comparisons

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





# Cod

Offer your customers the highest-quality cod available.



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.



*Wild, Natural & Sustainable®*

**For literature:** [www.alaskaseafood.org/retailers](http://www.alaskaseafood.org/retailers) • **For assets:** [alaskaseafood.creatorselect.com](http://alaskaseafood.creatorselect.com)  
**For promotional support:** Mark Jones 855-288-8841

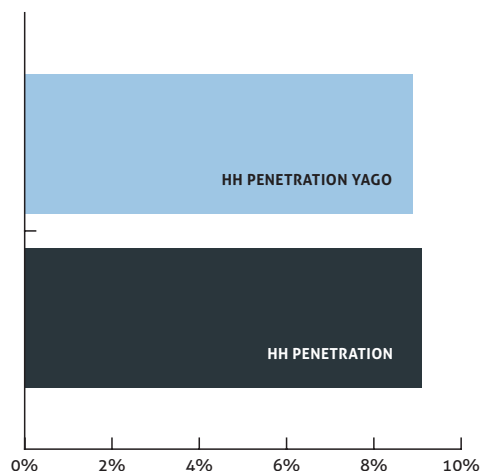




# SEAFOOD | CRAB

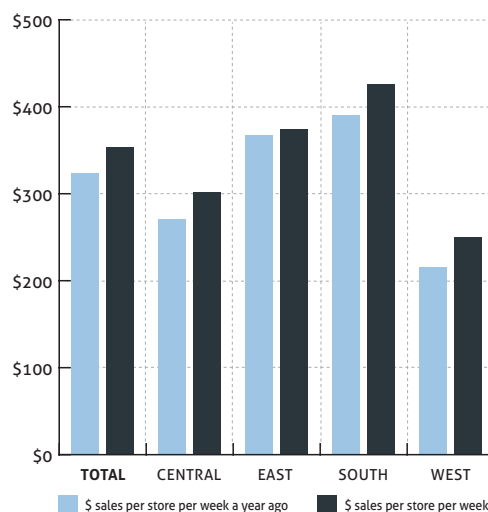
## Household Penetration

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



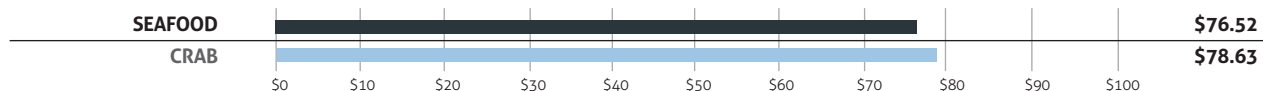
## Average Weekly Dollar Sales by Region

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



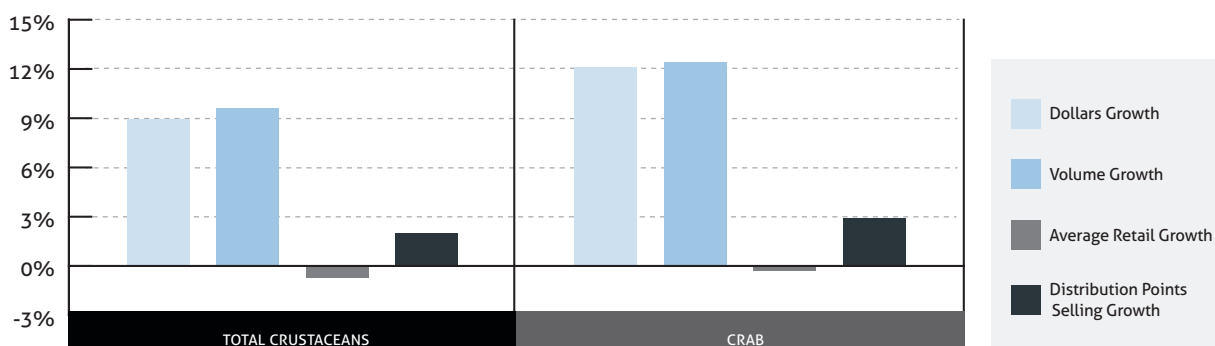
## Average Basket Size

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 Spire, a Datalogix company.



# Snow Crab

Nature's healthiest convenience food, courtesy of Alaska.



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.



*Wild, Natural & Sustainable®*

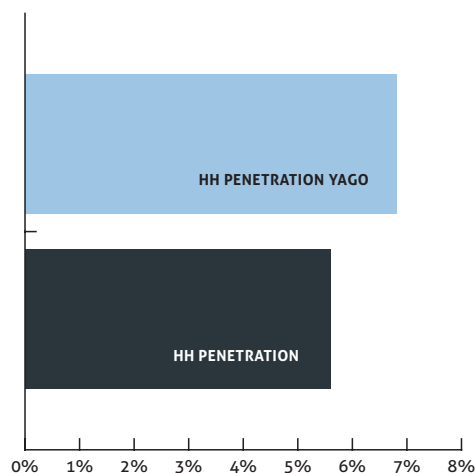
**For literature:** [www.alaskaseafood.org/retailers](http://www.alaskaseafood.org/retailers) • **For assets:** [alaskaseafood.creatorselect.com](http://alaskaseafood.creatorselect.com)

**For promotional support:** Mark Jones 855-288-8841



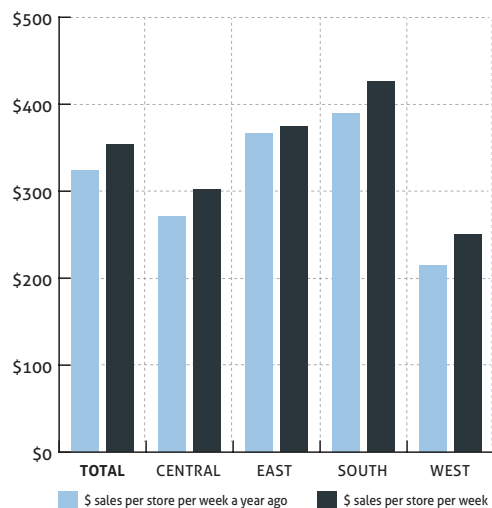
## Household Penetration

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



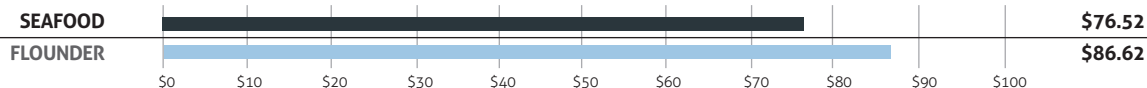
## Average Weekly Dollar Sales by Region

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



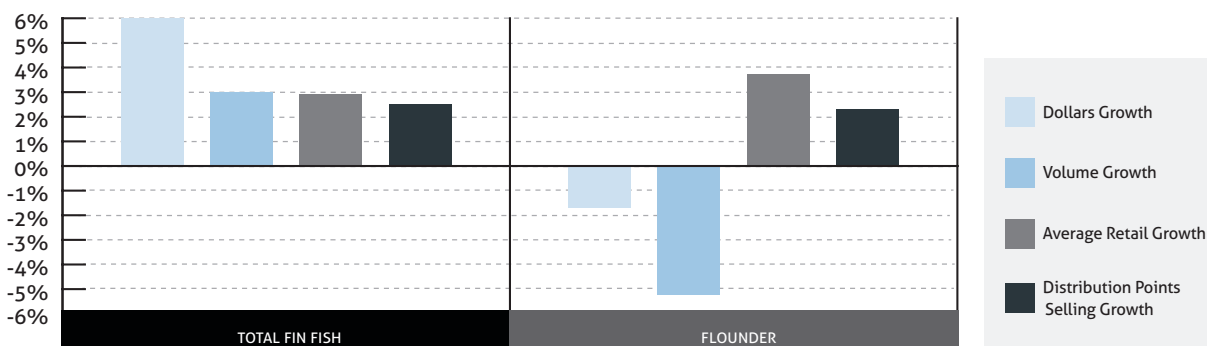
## Average Basket Size

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



## Trend Comparisons

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





# Sole

So light. So healthy. So Alaska.



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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For literature: [www.alaskaseafood.org/retailers](http://www.alaskaseafood.org/retailers) • For assets: [alaskaseafood.creatorselect.com](http://alaskaseafood.creatorselect.com)

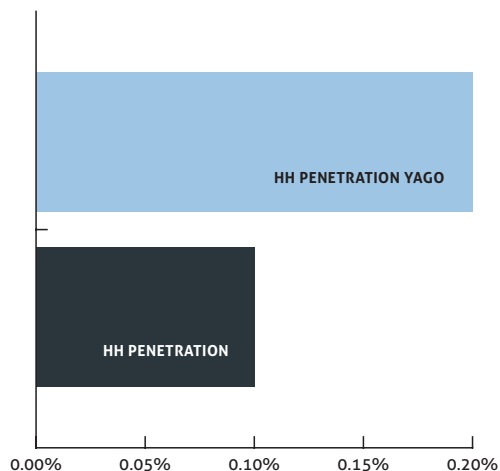
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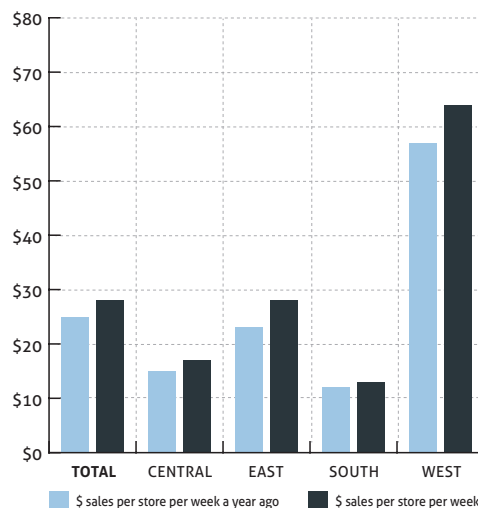
### Household Penetration

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



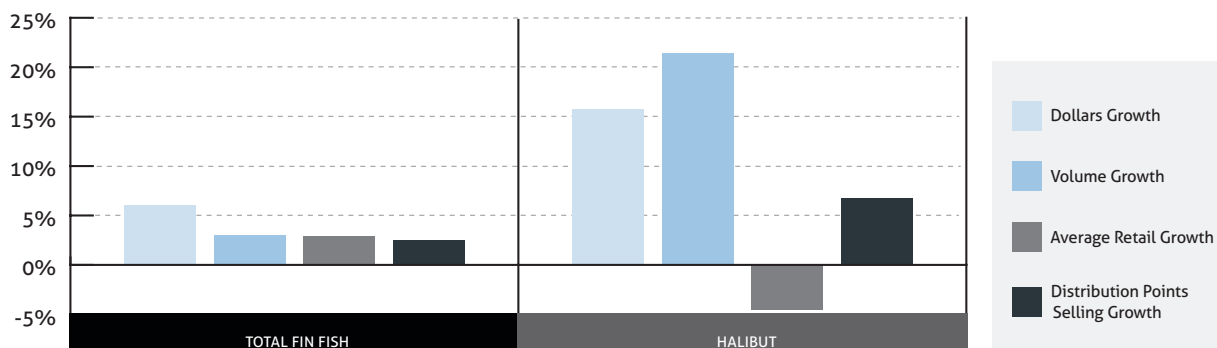
### Average Basket Size

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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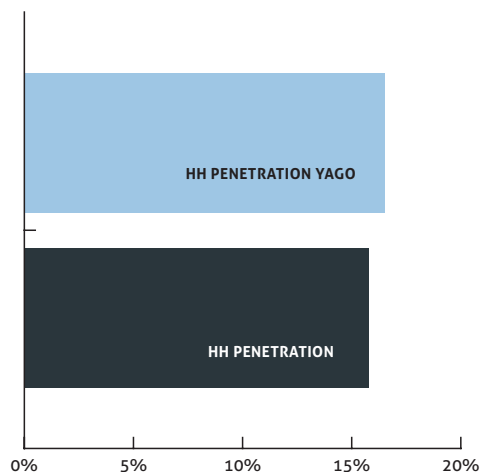
**For promotional support:** Mark Jones 855-288-8841





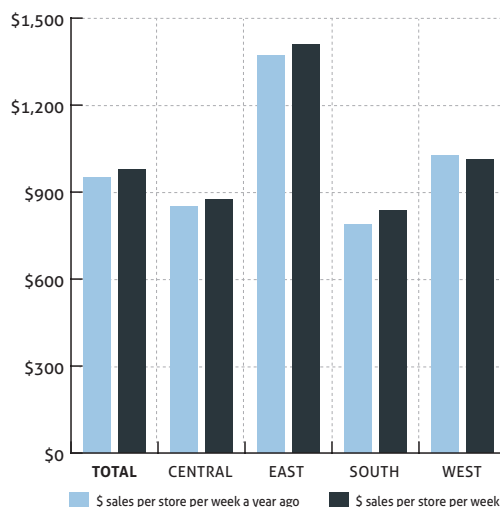
### Household Penetration

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



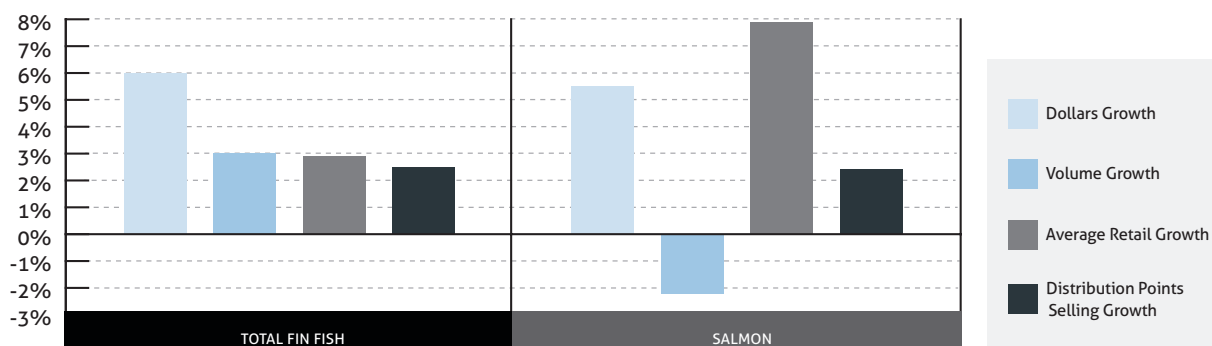
### Average Basket Size

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



### Trend Comparisons

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





# Salmon

Alaska salmon is the overwhelming choice for consumers.



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!



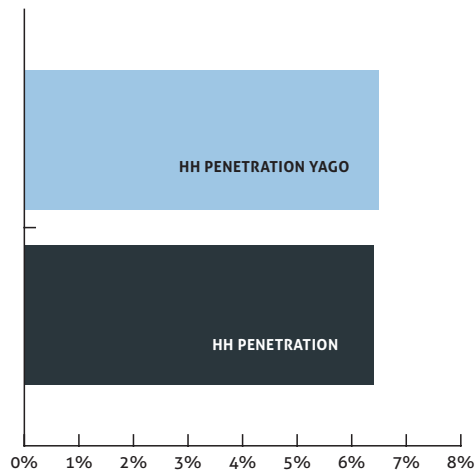
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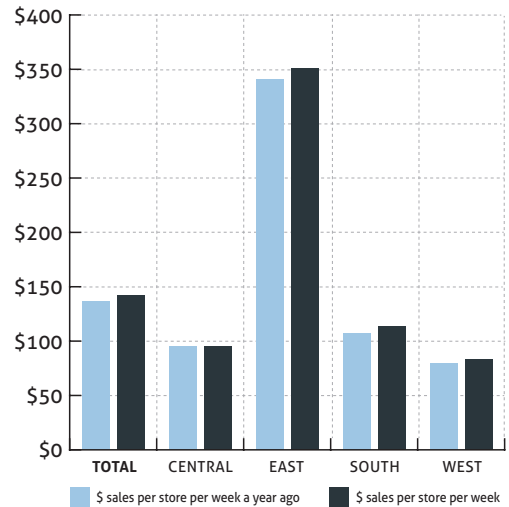
## Household Penetration

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



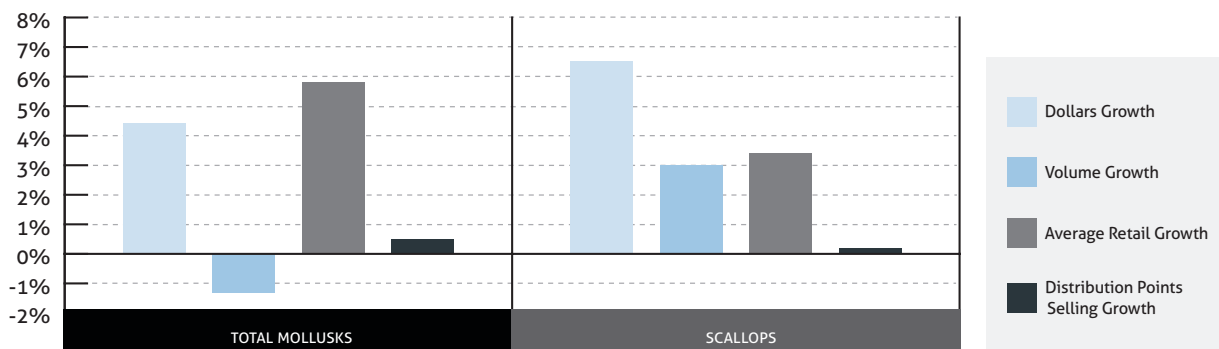
## Average Weekly Dollar Sales by Region

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



## Trend Comparisons

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



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# Scallops

The world's best scallops call the Gulf of Alaska home.



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.



*Wild, Natural & Sustainable®*

**For literature:** [www.alaskaseafood.org/retailers](http://www.alaskaseafood.org/retailers) • **For assets:** [alaskaseafood.creatorselect.com](http://alaskaseafood.creatorselect.com)

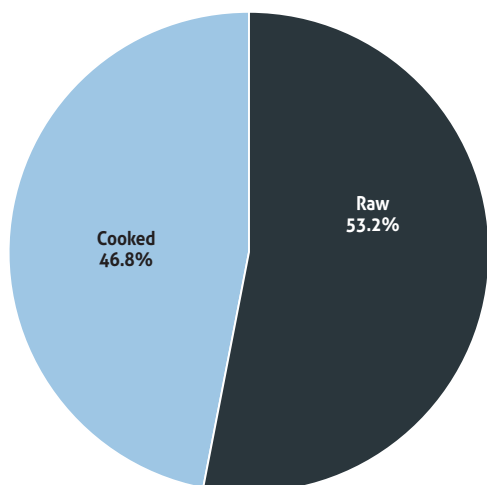
**For promotional support:** Mark Jones 855-288-8841





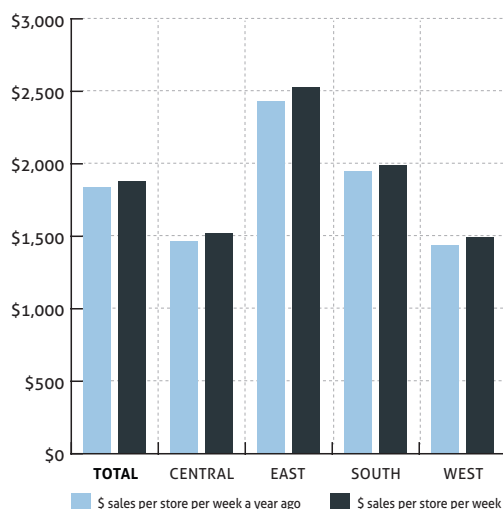
### Share of Category Dollars

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



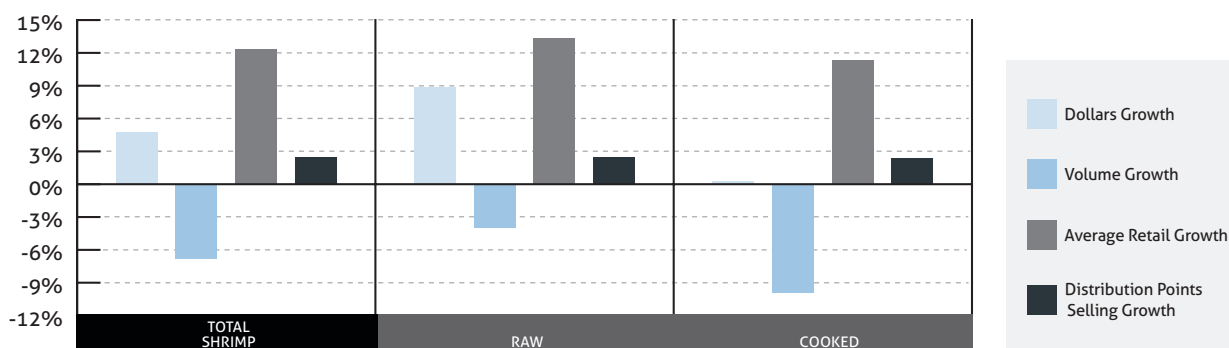
### Average Basket Size

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



### Trend Comparisons

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





# Power of the Brand

To consumers, the Alaska Seafood brand speaks volumes.



- 80% of consumers say that seeing the Alaska Seafood logo increases their likelihood to purchase.

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!



*Wild, Natural & Sustainable®*

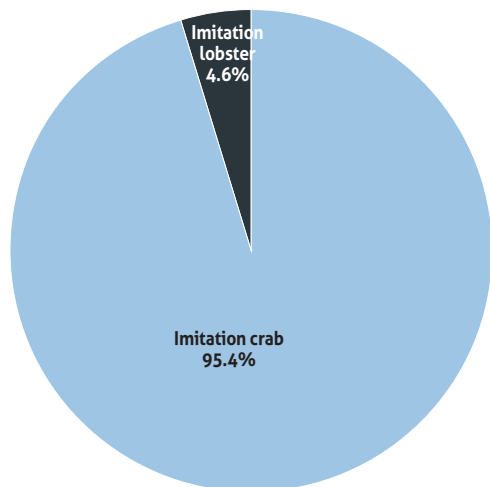
For more information or free in-store merchandising materials, contact Mark Jones toll free at 855-288-8841 or [mjones@alaskaseafood.org](mailto:mjones@alaskaseafood.org)





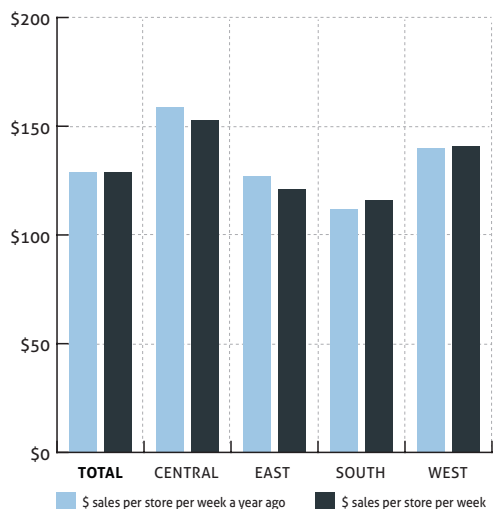
### Share of Category Dollars

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



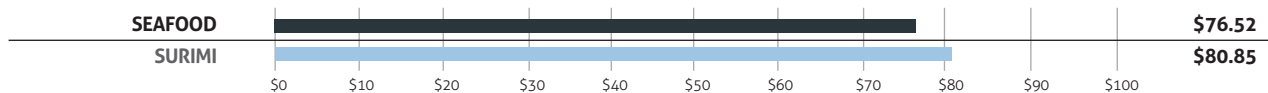
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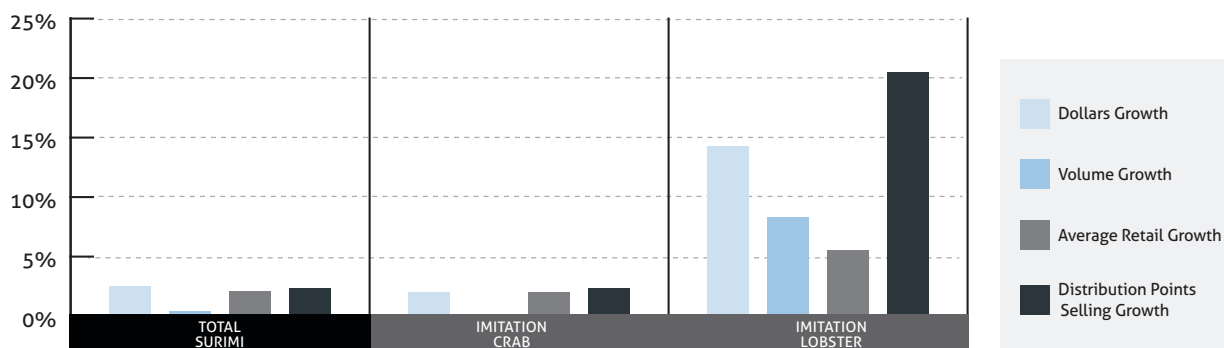
### Average Basket Size

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



### Trend Comparisons

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





# Surimi

From the icy waters of Alaska comes the world's finest surimi.



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.



*Wild, Natural & Sustainable®*

**For literature:** [www.alaskaseafood.org/retailers](http://www.alaskaseafood.org/retailers) • **For assets:** [alaskaseafood.creatorselect.com](http://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}

**T**HE 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 veg-

etables 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.

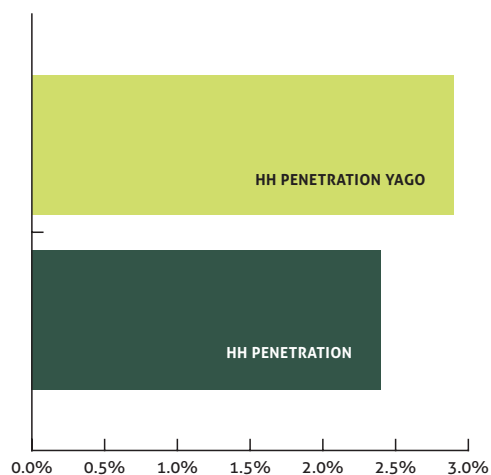
Consumer demand for convenience is another trend impacting the produce department. Products that provide additional value to consumers continue to increase item count. For example, value-added vegetables—which includes meal prep, snacking and trays—increased 8.5% while value-added fruits (fresh-cut fruit, 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. ◀◀





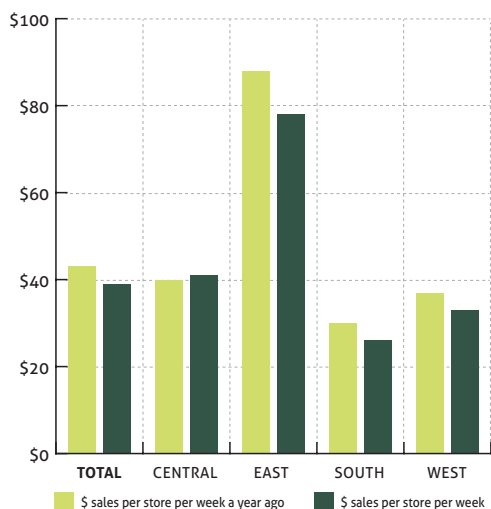
### Household Penetration

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



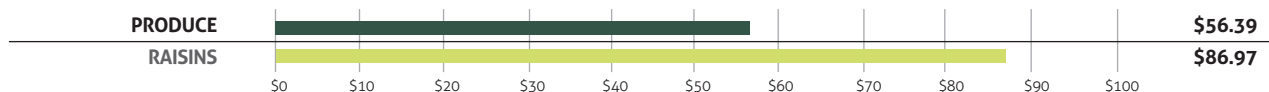
### Average Weekly Dollar Sales by Region

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

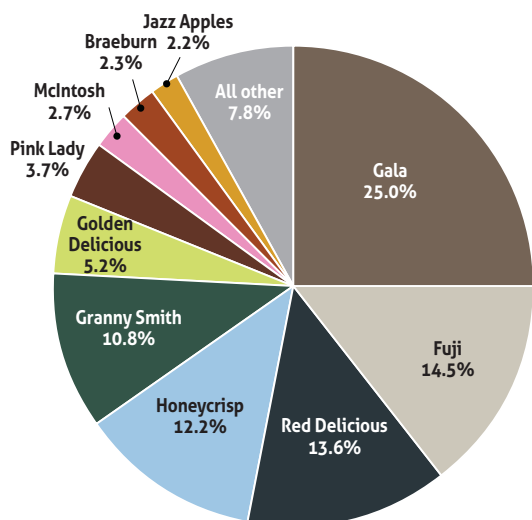


Nielsen Perishables Group Data – Point-of-sale charts: Nielsen Perishables Group FreshFacts®; Purchase Frequency and Basket Size charts: Nielsen Perishables Group FreshFacts® Shopper Insights powered by Spire, a Datalogix company.



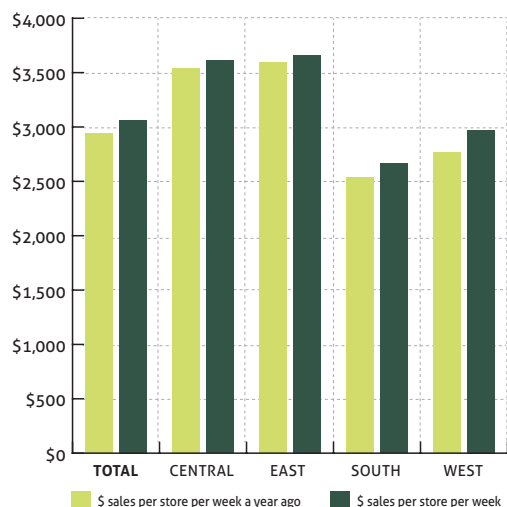
## Share of Category Dollars

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



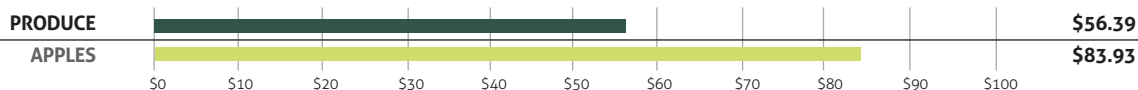
## Average Weekly Dollar Sales by Region

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



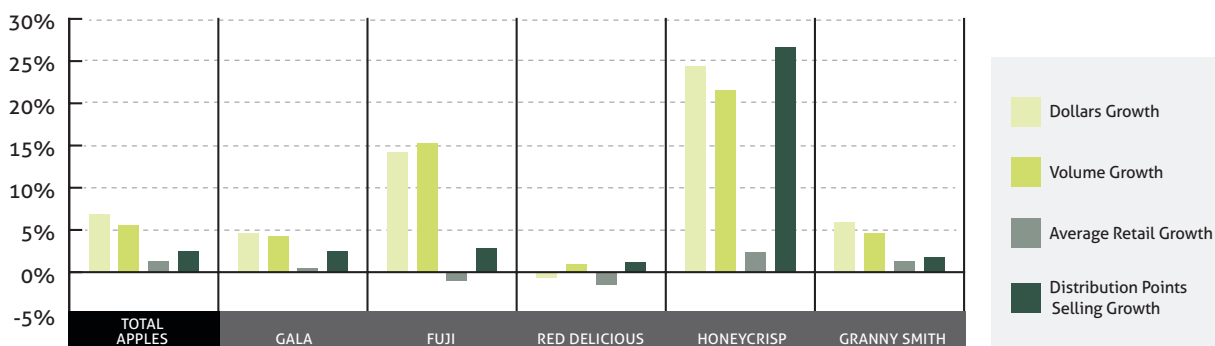
## Average Basket Size

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.



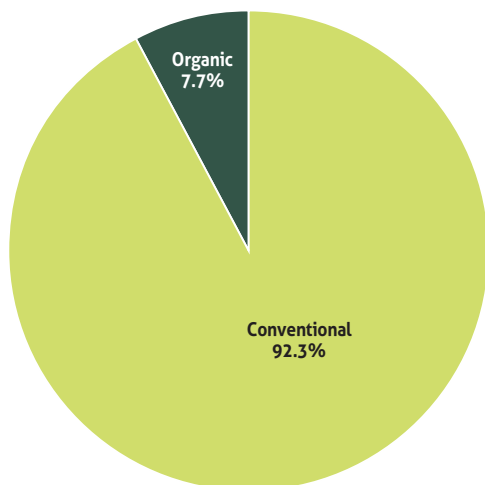




# PRODUCE | ORGANIC APPLES

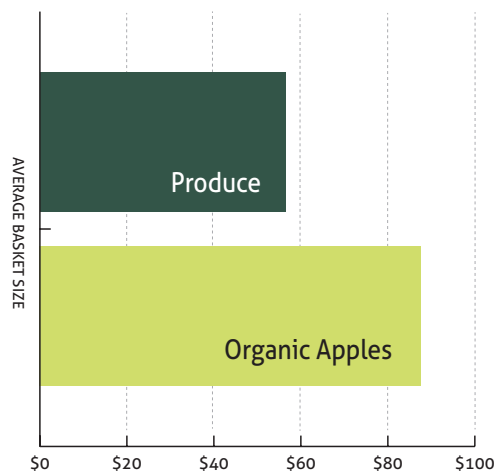
## Share of Category Dollars

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



## Average Basket Size

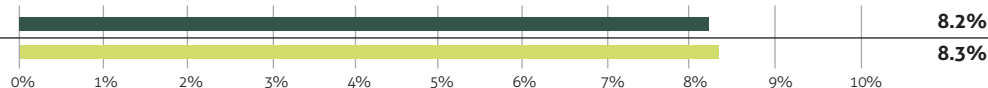
Total U.S. for the 52 weeks ended 2/22/14



## Household Penetration

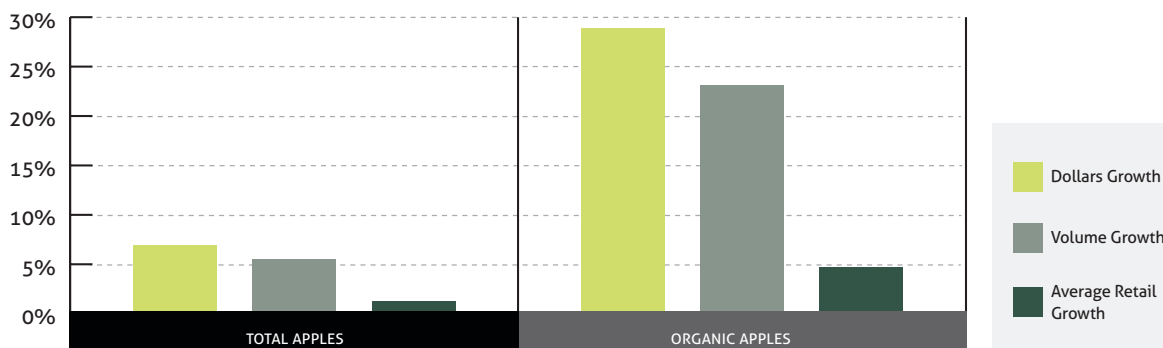
Total U.S. for the 52 weeks ended 2/22/14

HH penetration YAGO  
HH penetration



## 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 Spire, a Datalogix company.



#1 Selling Branded Organic Apples\*



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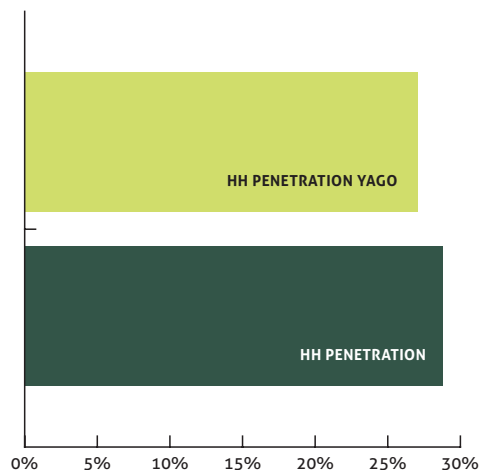
\*Source: Nielsen Perishables Group *FreshFacts*®, Organic apple sales, September 1, 2013 to March 30, 2014. Excludes all private label and unbranded organic apple products.





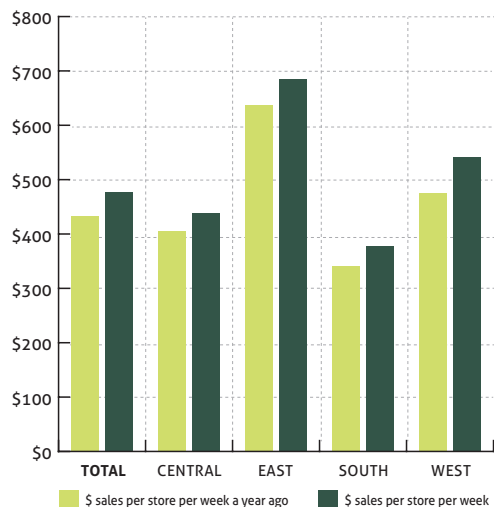
## Household Penetration

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



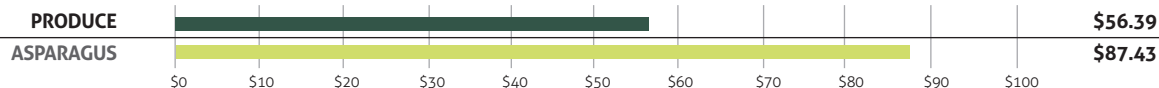
## Average Weekly Dollar Sales by Region

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



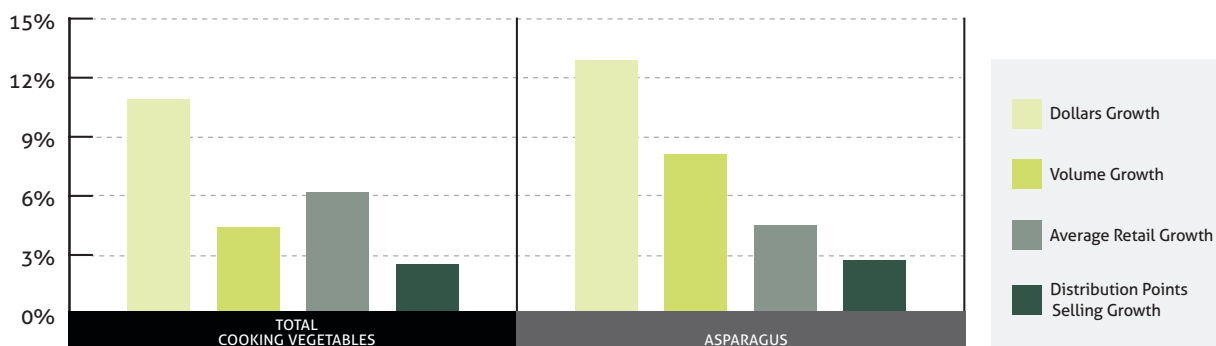
## Average Basket Size

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



## Trend Comparisons

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





- ✓ 365 availability
- ✓ variety
- ✓ category insights
- ✓ value added
- ✓ gourmet quality



# Some would call it an obsession... we call it category leadership.

Asparagus from Southern Specialties

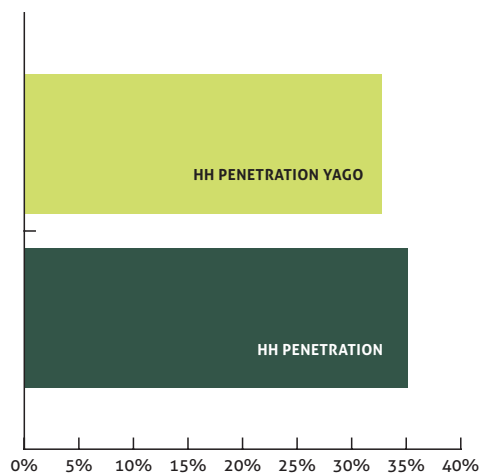






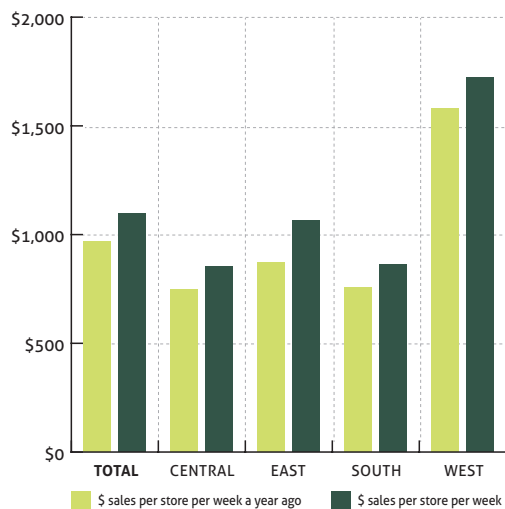
### Household Penetration

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



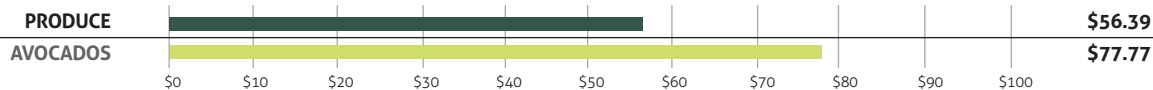
### Average Weekly Dollar Sales by Region

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



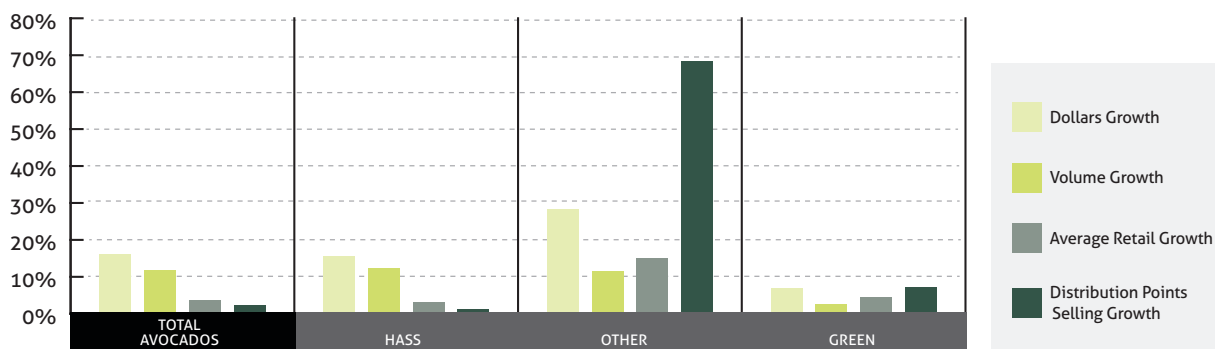
### Average Basket Size

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



### Trend Comparisons

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





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with Superior Fruit,  
Ripening Expertise,  
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Customer Service

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Chicago  
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Toronto  
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Atlanta  
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800 549 3420

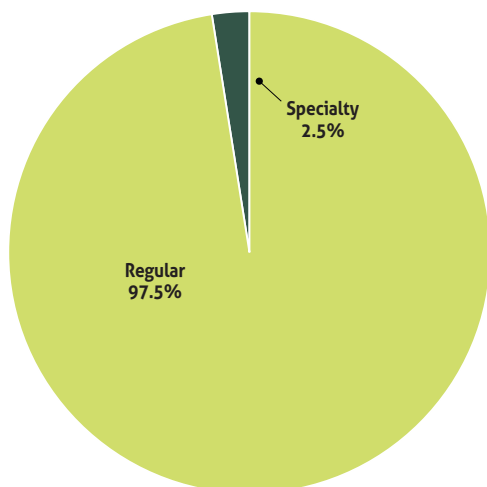






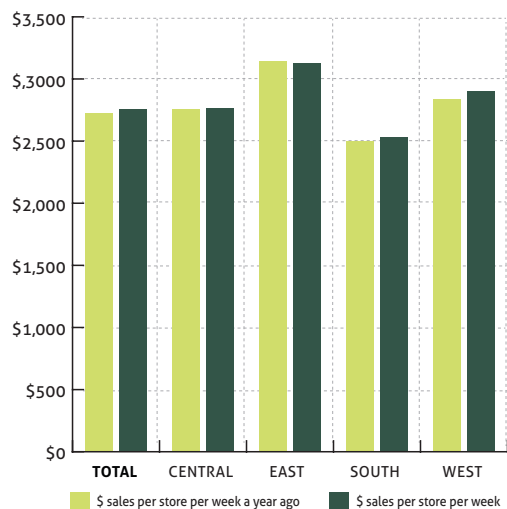
## Share of Category Dollars

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



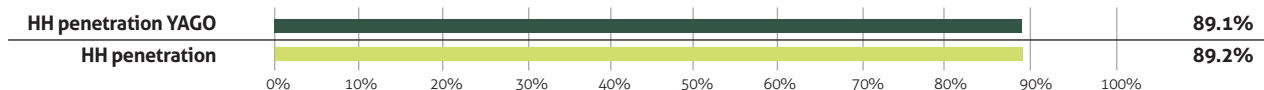
## Average Weekly Dollar Sales by Region

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

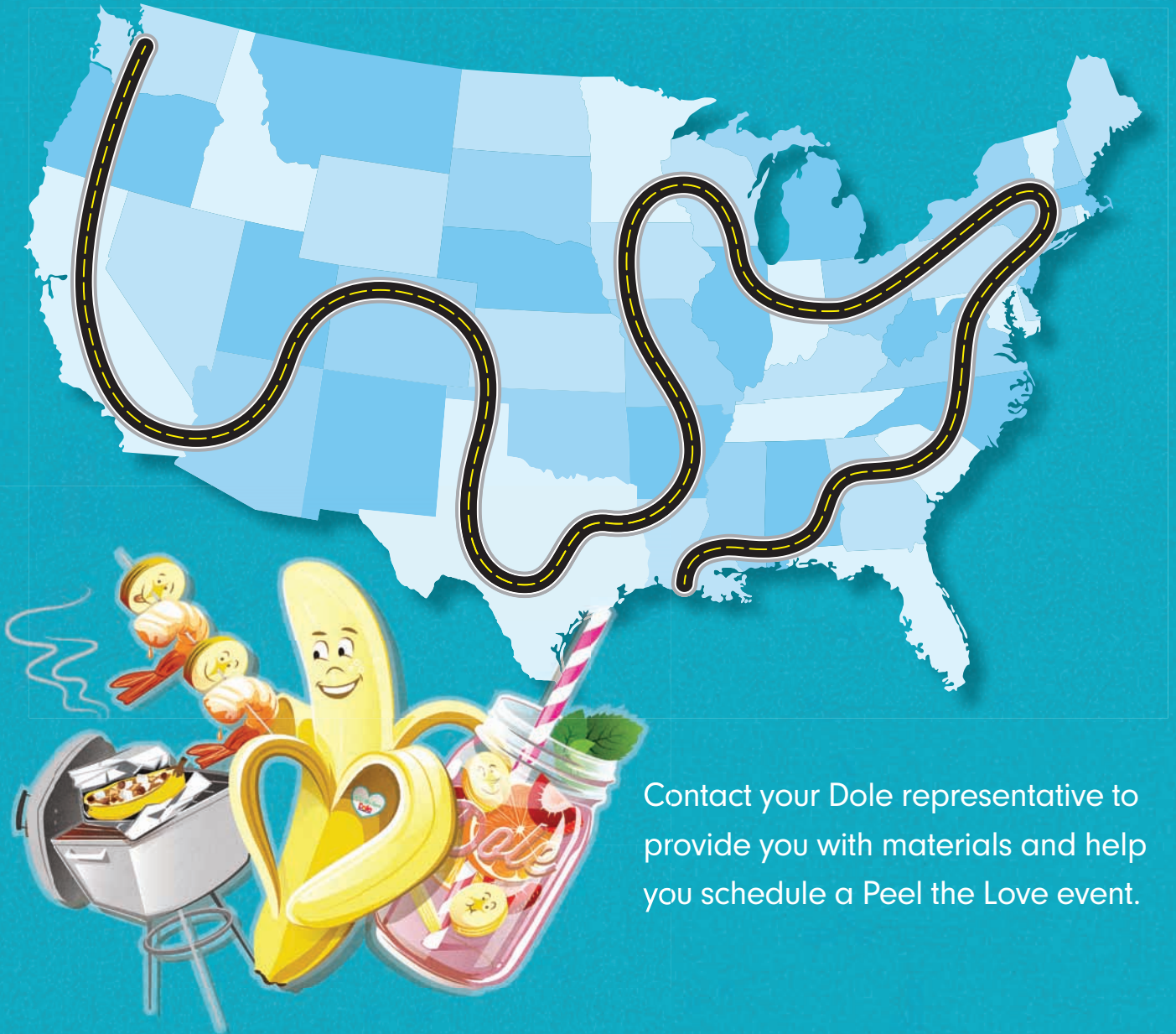




Peel the love. 

KEEP YOUR EYES ON THE ROAD

**Dole's "Peel the Love Summer Tour"**  
is coming back with even more stops and  
promotional opportunities than last year.



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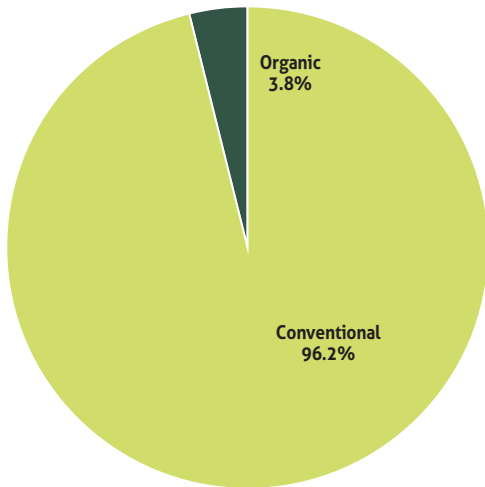




# PRODUCE | ORGANIC BANANAS

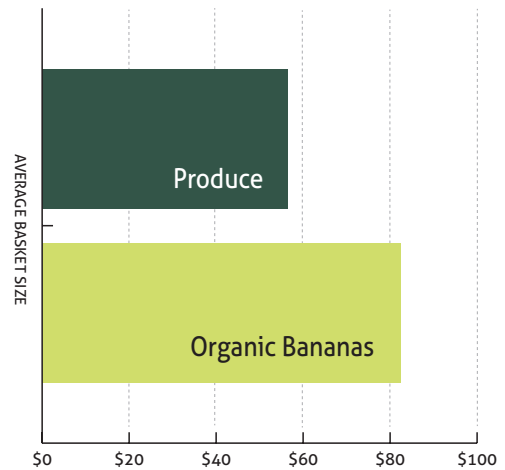
## Share of Category Dollars

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



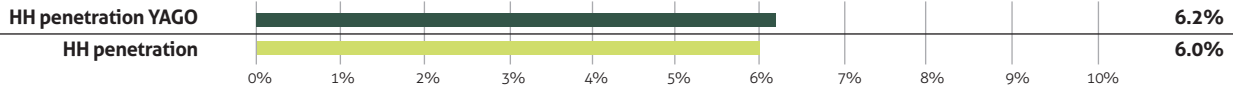
## Average Basket Size

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



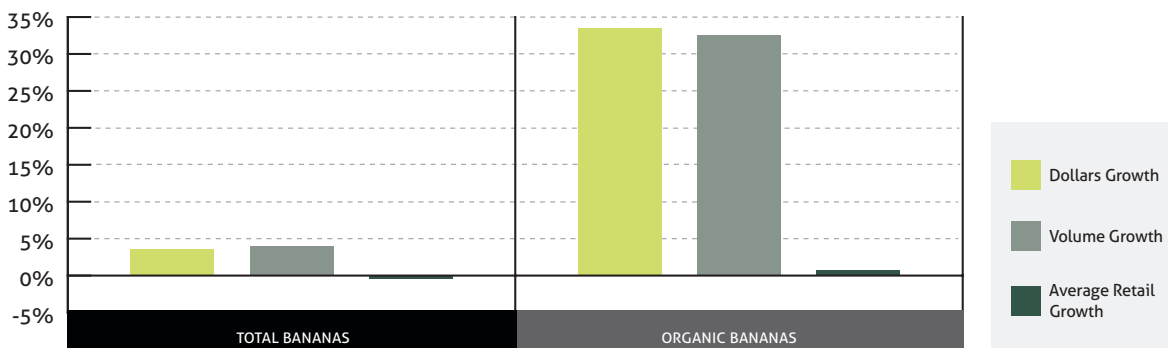
## Household Penetration

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



## Trend Comparisons

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





# PERFECTLY

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# FRESH



*From farm to grocer to table.*



## CONSISTENT

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](http://GROWBananas.org).

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

[www.organicsunlimited.com](http://www.organicsunlimited.com)



**BUY A BANANA.  
CHANGE A LIFE.**

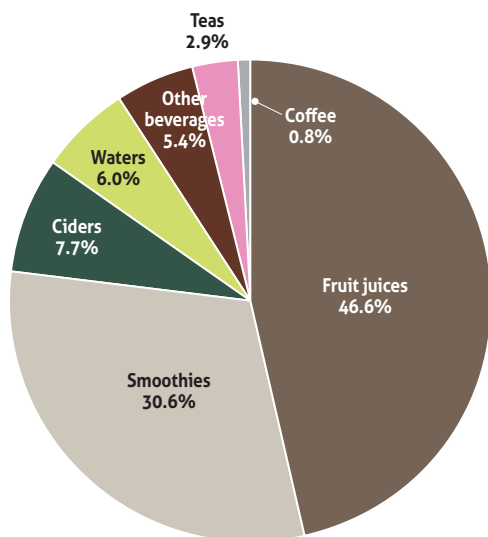






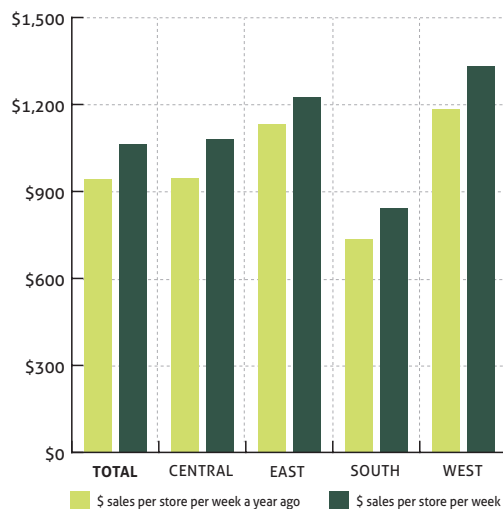
## Share of Category Dollars

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



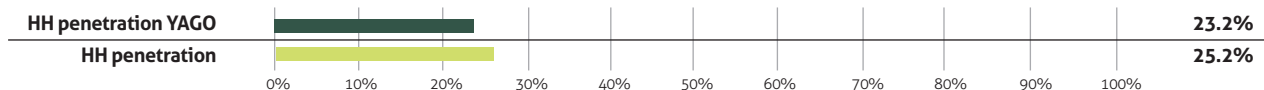
## Average Weekly Dollar Sales by Region

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



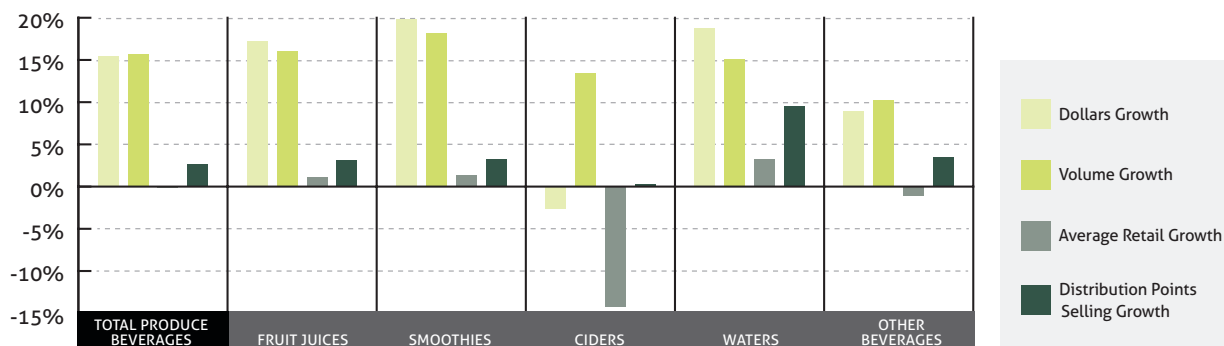
## Household Penetration

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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*Grimmway Farms*



*Honestly Organic*



*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.*



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ORGANIC**

*from the soil  
to the bottle*



**GROWING  
GREEN**

*for future  
sustainability*



**FAMILY  
OWNED**

*for three  
generations*



**GIVING  
BACK**

*to our  
communities*



**OUR  
PROMISE**

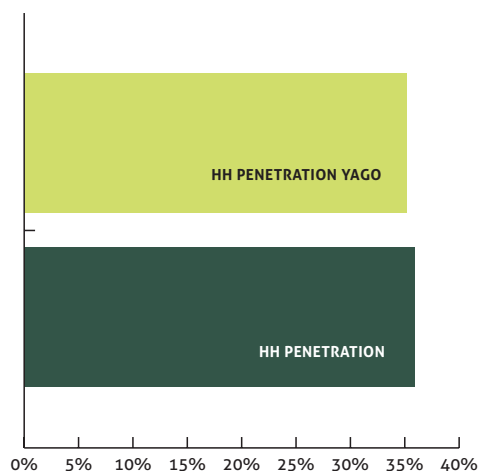
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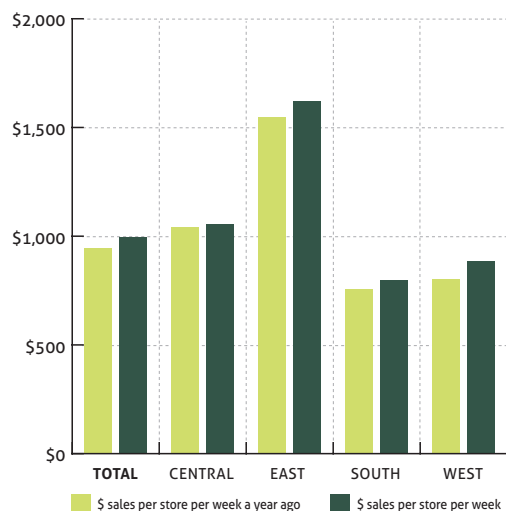
## Household Penetration

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



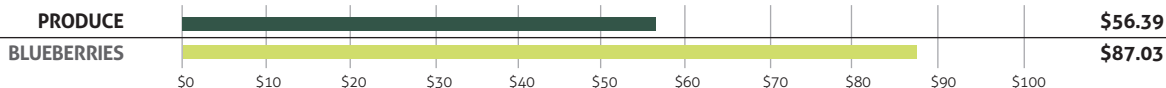
## Average Weekly Dollar Sales by Region

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



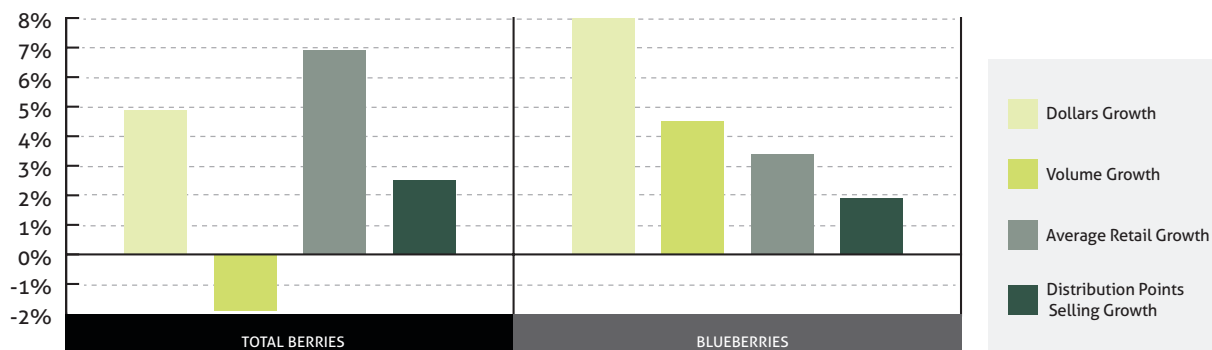
## Average Basket Size

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



## Trend Comparisons

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







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---

**BLUEBERRIES ARE THE  
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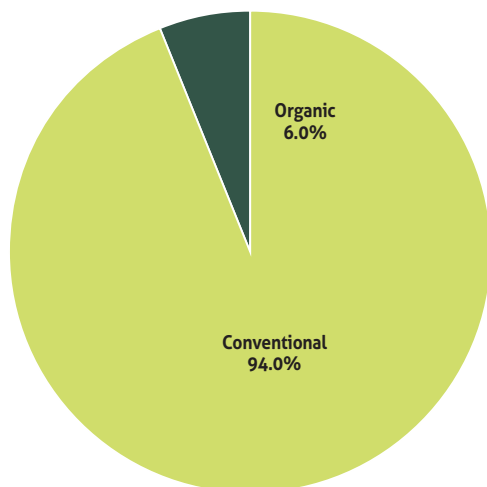
*Hurst's*  
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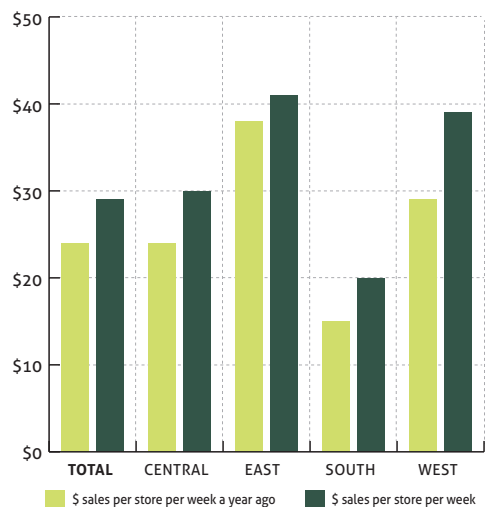
## Share of Category Dollars

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



## Average Weekly Dollar Sales by Region

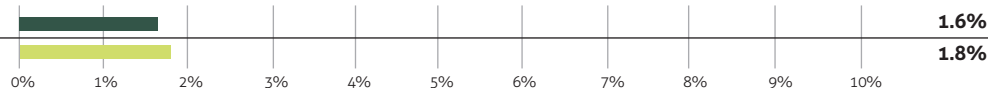
Total U.S. for the 52 weeks ended 2/22/14



## Household Penetration

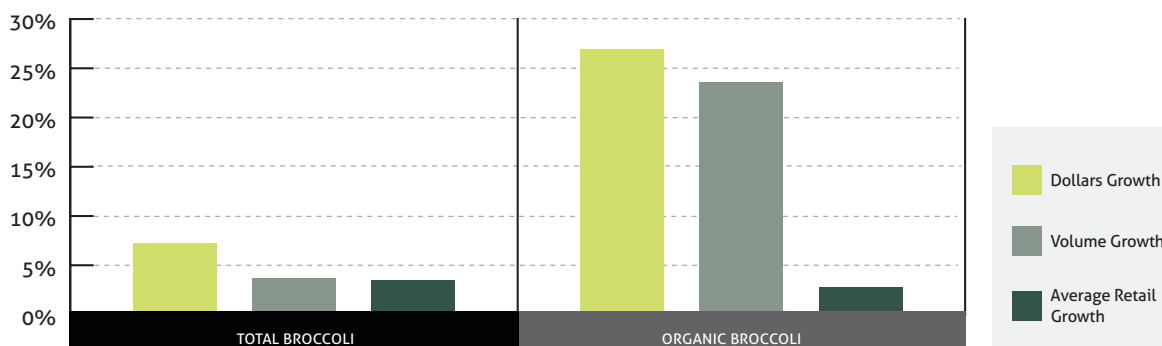
Total U.S. for the 52 weeks ended 2/22/14

HH penetration YAGO  
HH penetration



## Trend Comparisons

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







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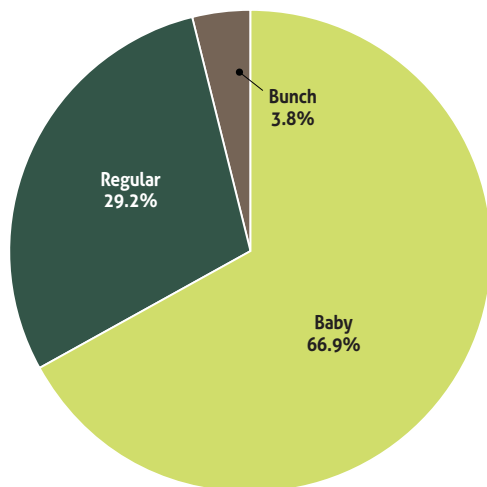
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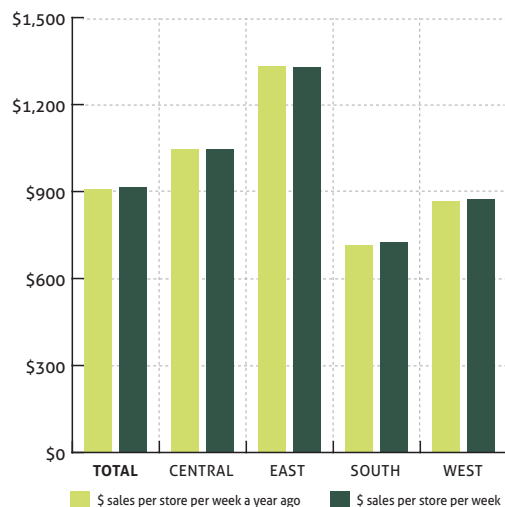
### Share of Category Dollars

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



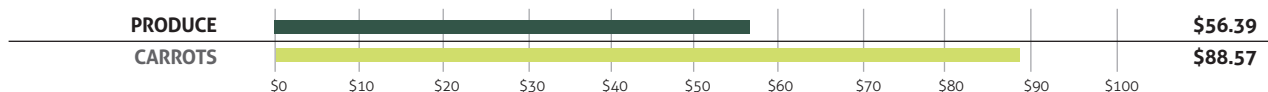
### Average Weekly Dollar Sales by Region

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



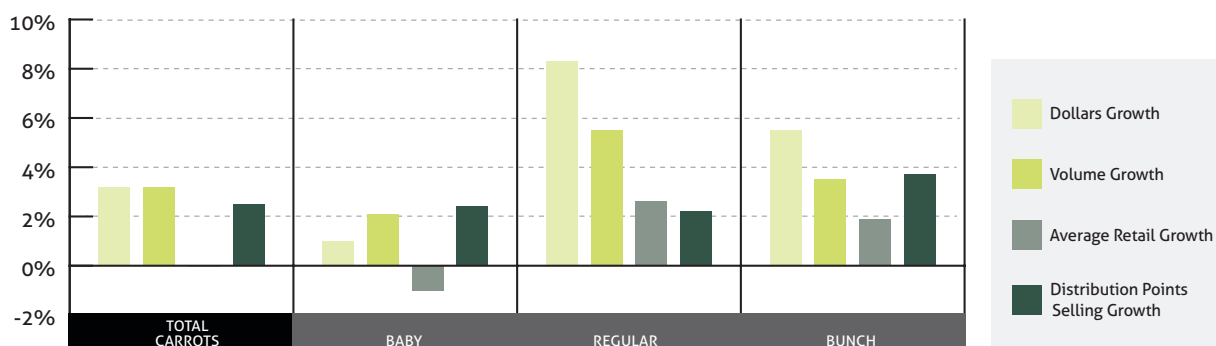
### Average Basket Size

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



### Trend Comparisons

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







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*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.*



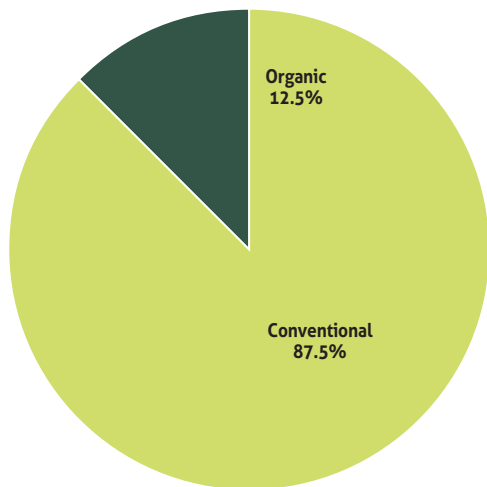
[www.grimmway.com](http://www.grimmway.com)





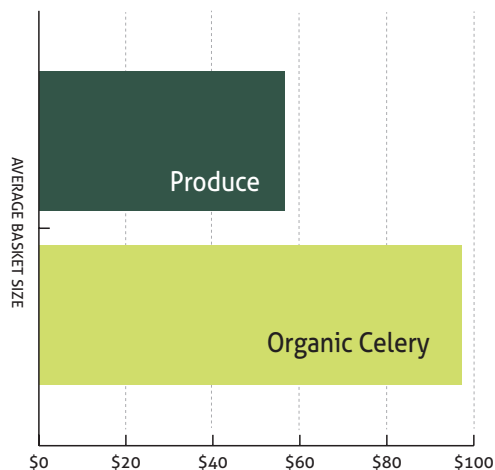
### Share of Category Dollars

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

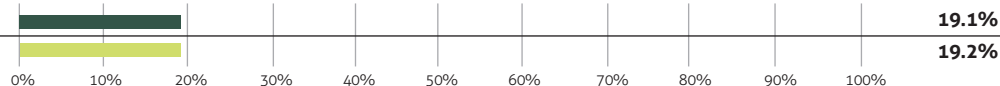


### Household Penetration

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

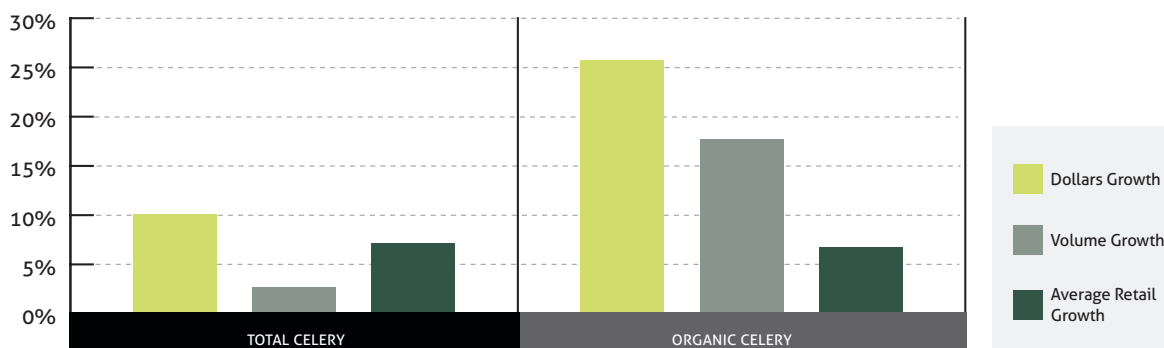
HH penetration YAGO

HH penetration



### Trend Comparisons

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







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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.

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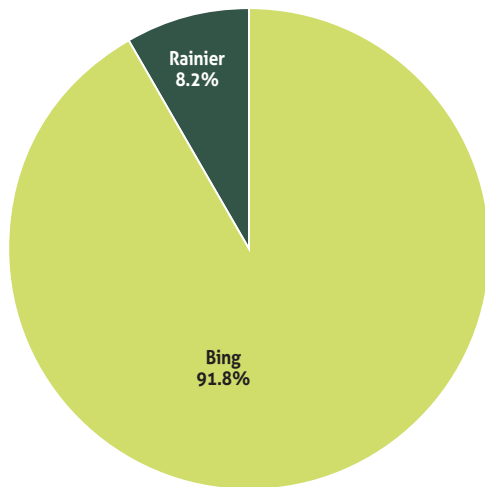
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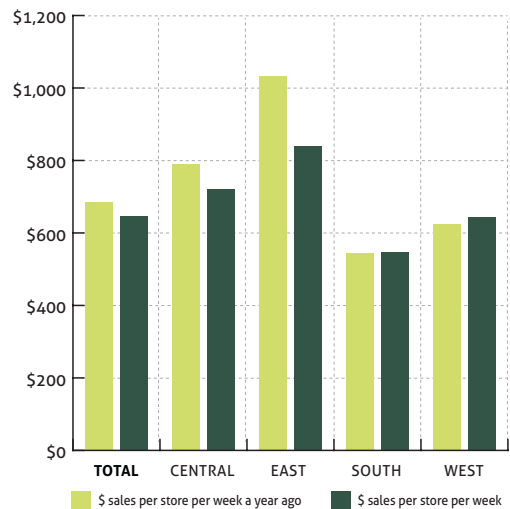
## Share of Category Dollars

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



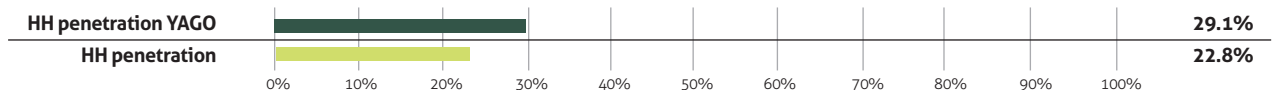
## Average Weekly Dollar Sales by Region

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



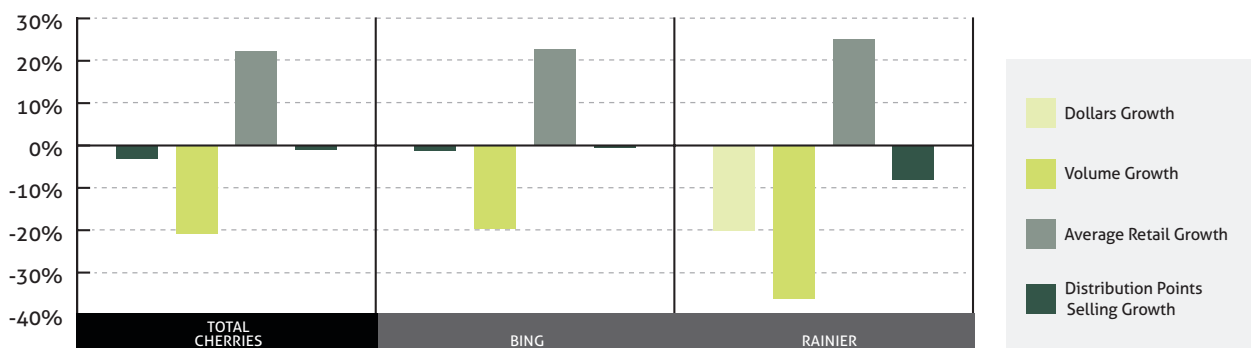
## Household Penetration

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



## Trend Comparisons

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







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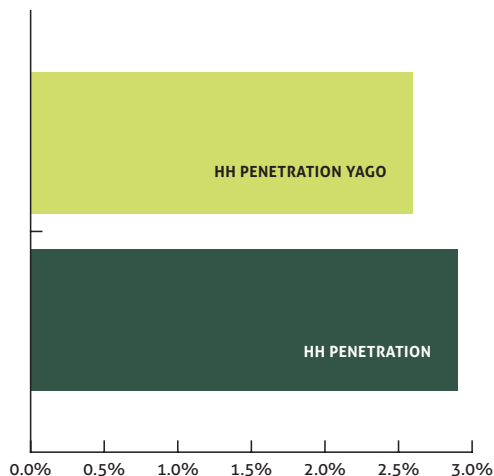
It's going to be a bumper crop!

[ChelanFresh.com](http://ChelanFresh.com)



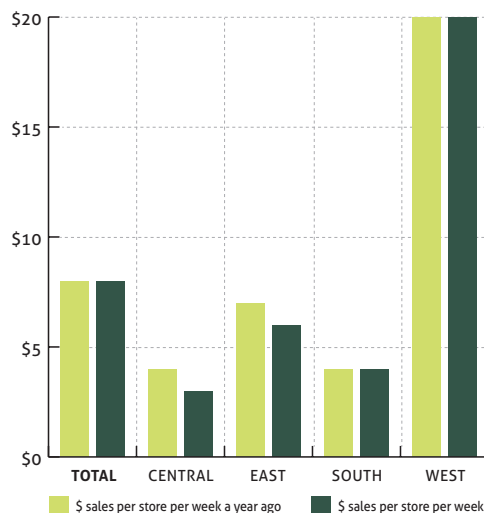
## Household Penetration

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



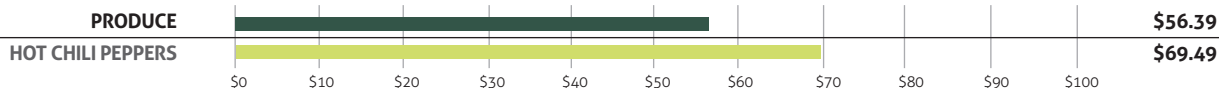
## Average Weekly Dollar Sales by Region

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



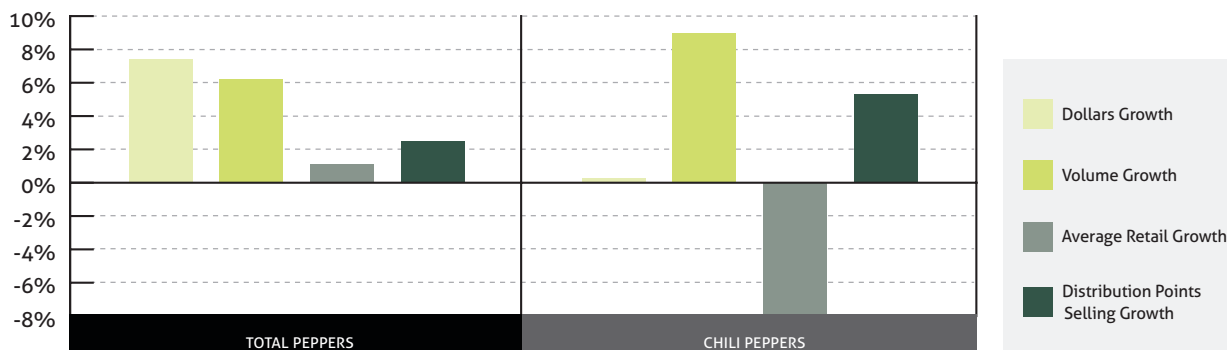
## Average Basket Size

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



## Trend Comparisons

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







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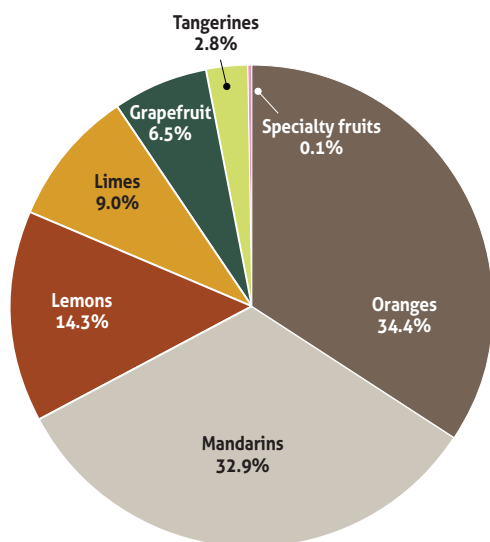


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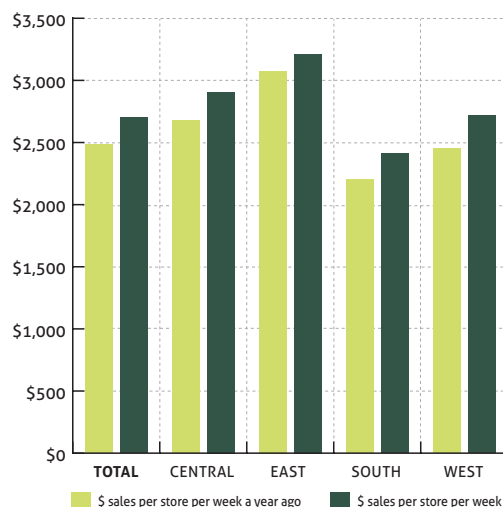
## Share of Category Dollars

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



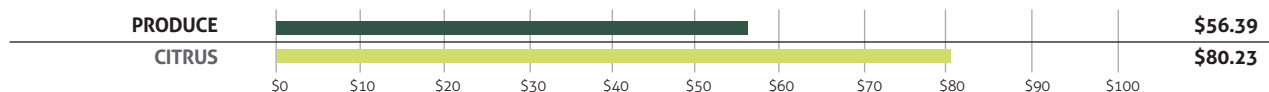
## Average Weekly Dollar Sales by Region

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



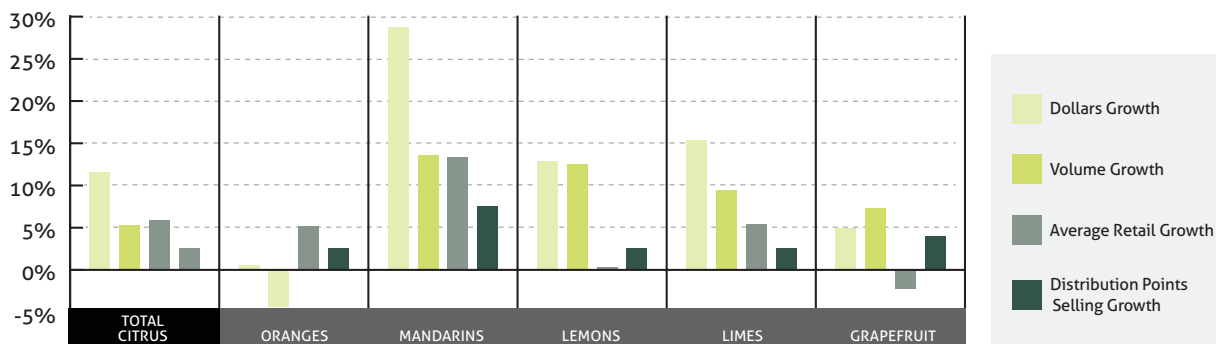
## Average Basket Size

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



## Trend Comparisons

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





# DELIGHT THEM WITH



Citrus for  
Every  
Season!



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Dandy Fresh Fruits  
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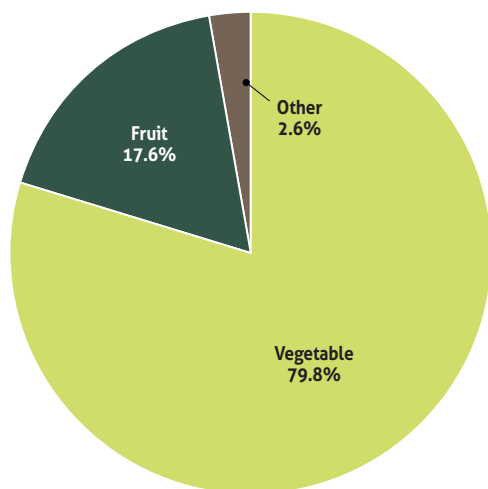


DandyFreshProduce



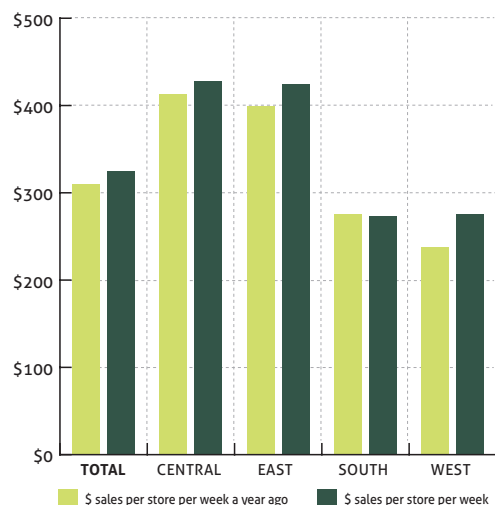
## Share of Category Dollars

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



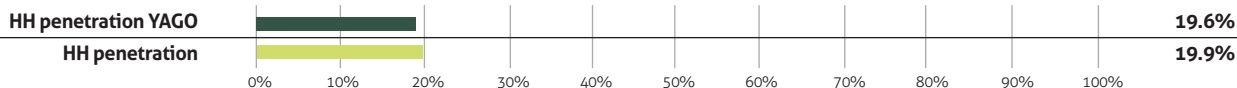
## Average Weekly Dollar Sales by Region

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





# Grow your sales with America's #1 branded guacamole!\*



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





**All Wholly™ Products:**  
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Please contact our Retail Sales Representatives  
Telephone: 817.509.0626 | Fax: 817.509.0636



Fresherized Foods | 300 Burlington Rd. Saginaw, TX 76179

\*According to IRI 2014

  @eatWholly | Wholly Guacamole  

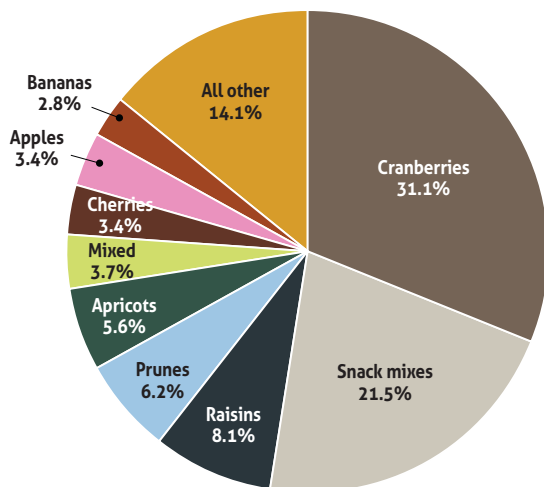




## PRODUCE | DRIED FRUIT & SNACK MIXES

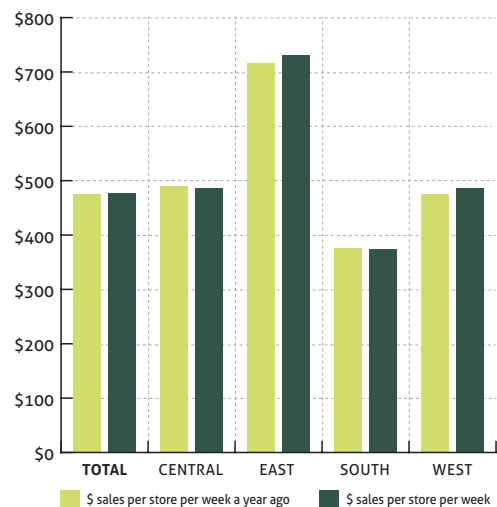
### Share of Category Dollars

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



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 Spire, a Datalogix company.



# Fuel your life.



## 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!



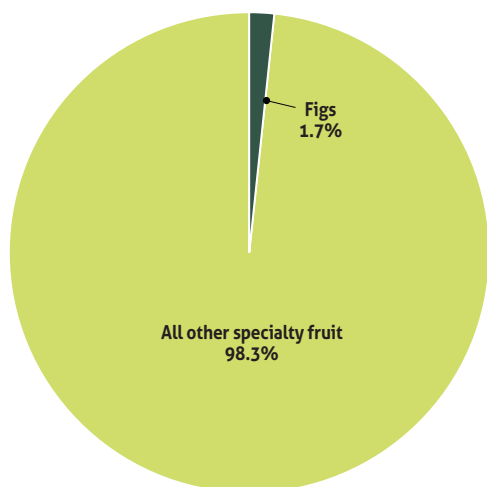
[mariani.com](http://mariani.com)





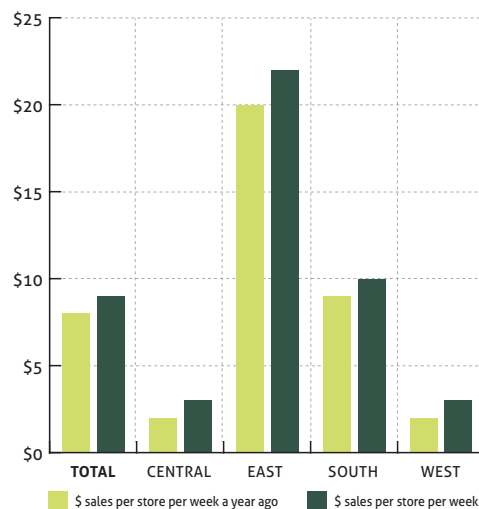
## Share of Category Dollars

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



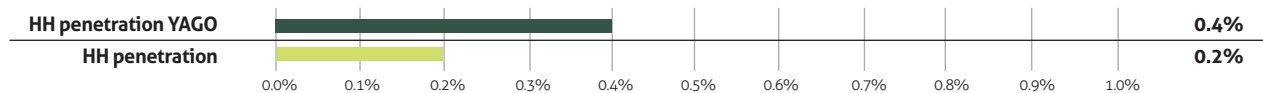
## Average Weekly Dollar Sales by Region

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



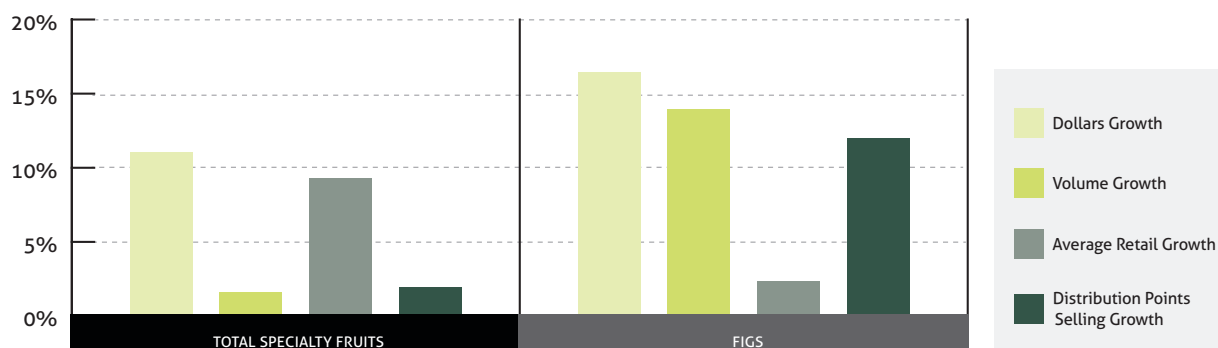
## Household Penetration

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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**Stellar Distributing is the exclusive seller of tiger  
figs. Now shipping for AUGUST thru NOVEMBER.**



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for more information on our products.**

**Stellar Distributing**

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**559-664-8400**

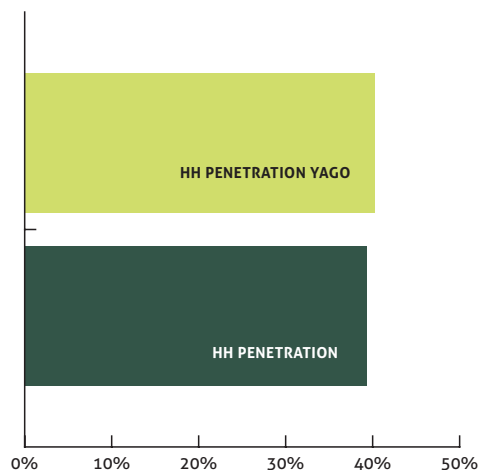




## PRODUCE | GARLIC

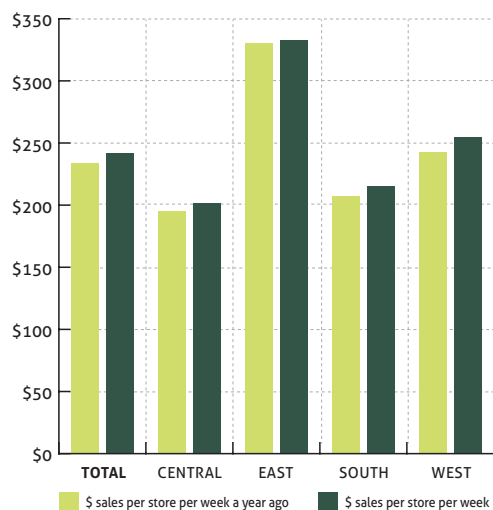
### Household Penetration

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



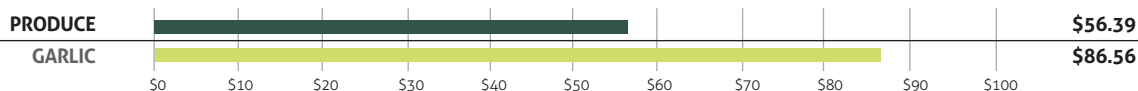
### Average Weekly Dollar Sales by Region

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



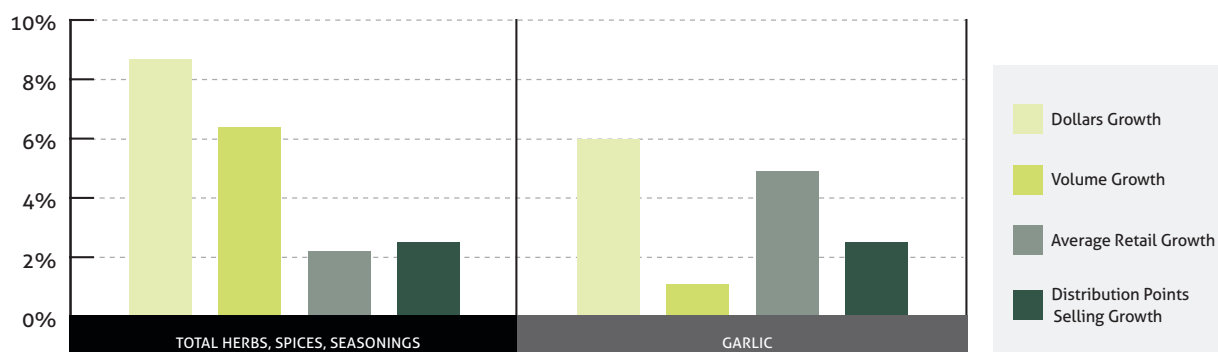
### Average Basket Size

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 Spire, a Datalogix company.





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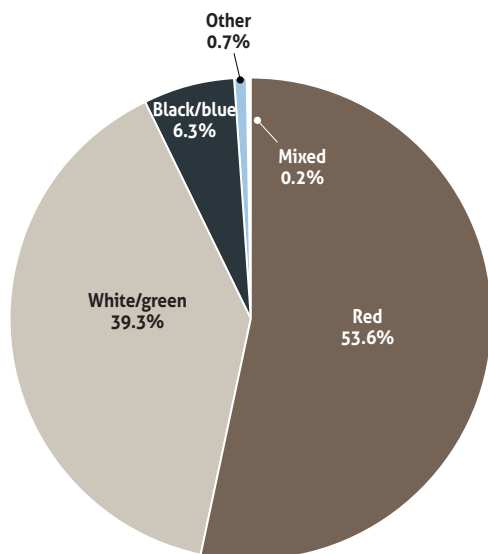
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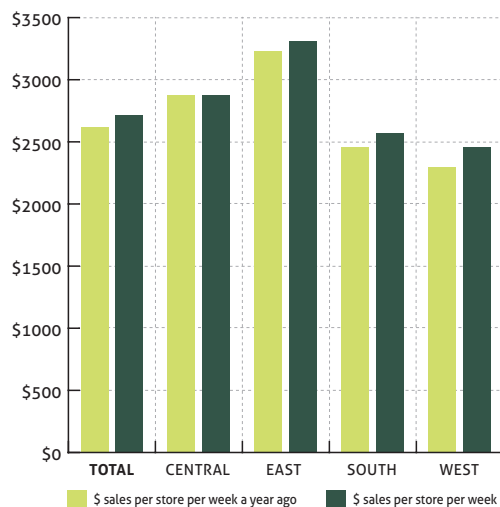
## Share of Category Dollars

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

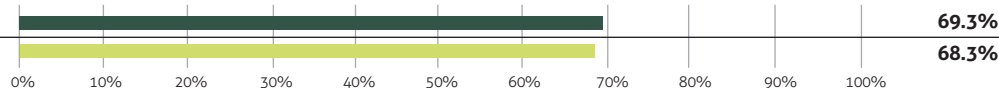


## Household Penetration

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

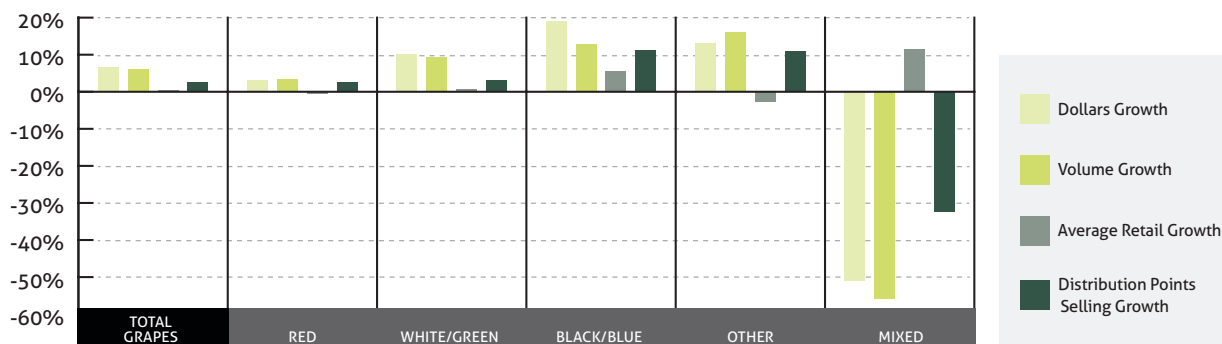
HH penetration YAGO

HH penetration



## Trend Comparisons

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







**WE DON'T JUST SOURCE GLOBAL,  
WE ARE GLOBAL.**

**For all your grape needs, contact us.**

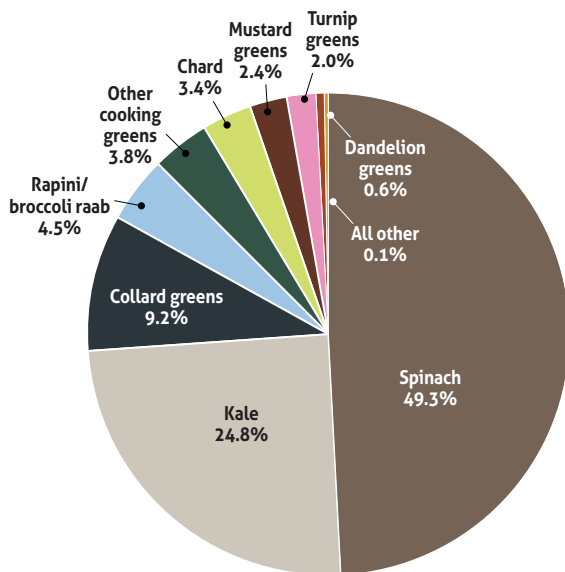
**661.858.8240**

**[www.allianceintproduce.com](http://www.allianceintproduce.com)**



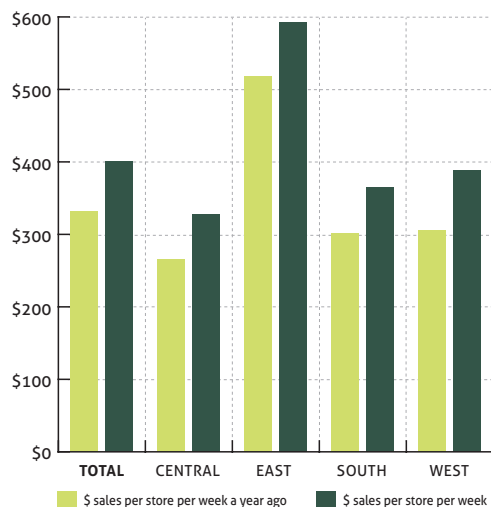
## Share of Category Dollars

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

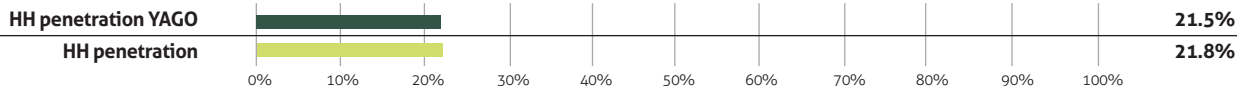


## Average Weekly Dollar Sales by Region

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

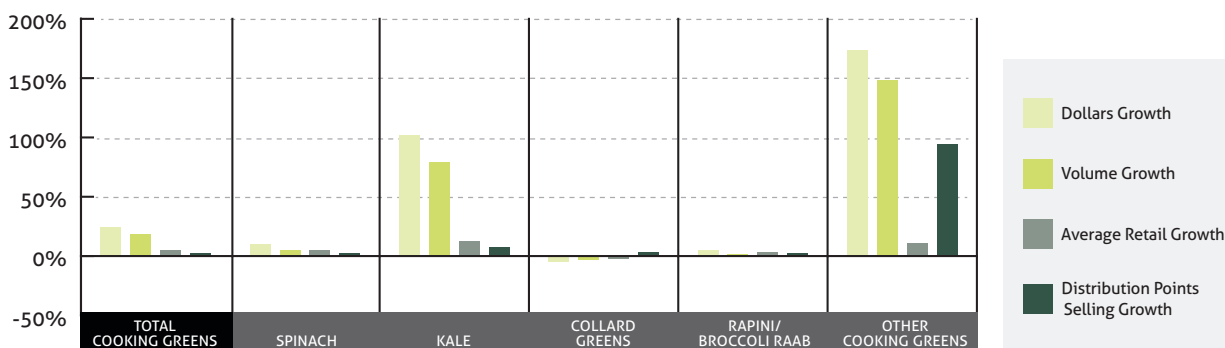


## Household Penetration Total U.S. for the 52 weeks ended 2/22/14

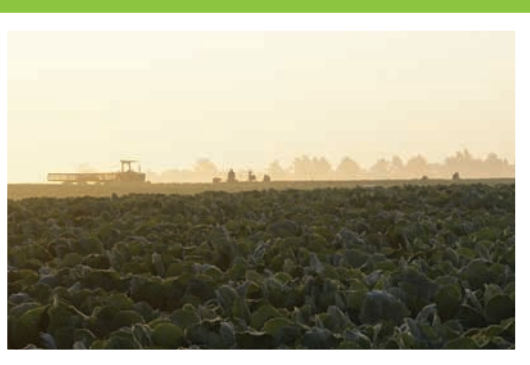
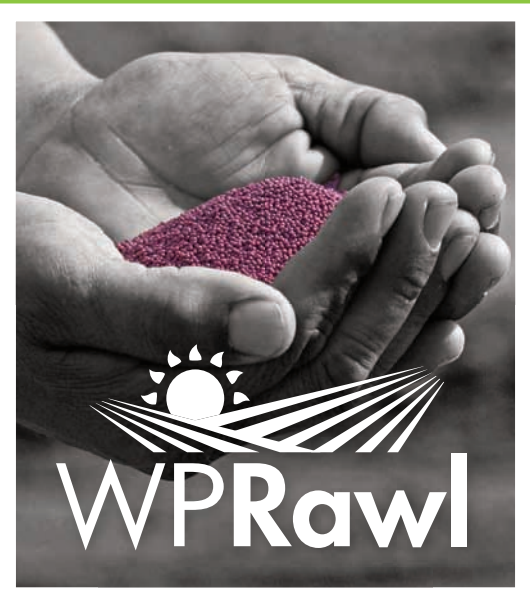
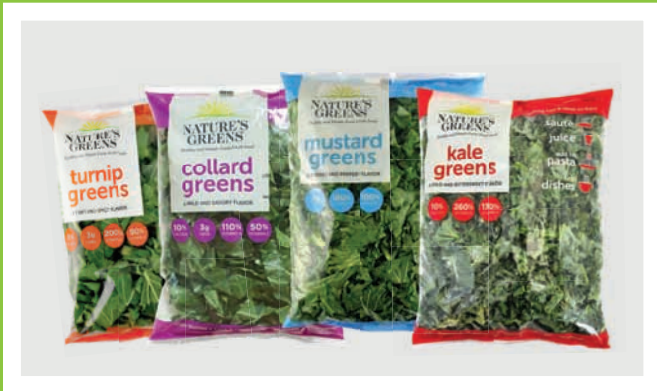


## Trend Comparisons

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







# OUR BUSINESS IS GROWING®



Versatile Veggies®

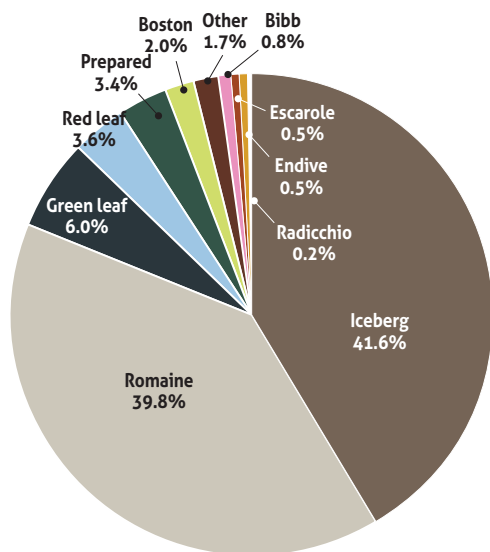
824 Fairview Road, Pelion, SC 29123 | 803-894-1900 | [www.rawl.net](http://www.rawl.net) | [www.facebook.com/WPRawl](http://www.facebook.com/WPRawl)





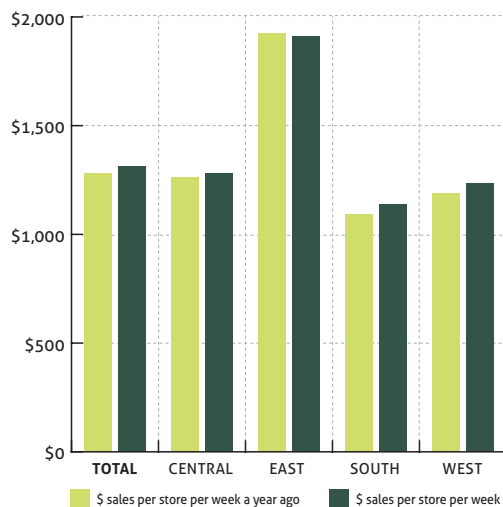
## Share of Category Dollars

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



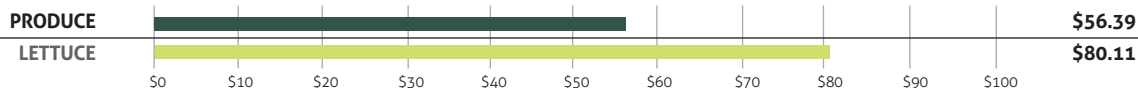
## Average Weekly Dollar Sales by Region

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



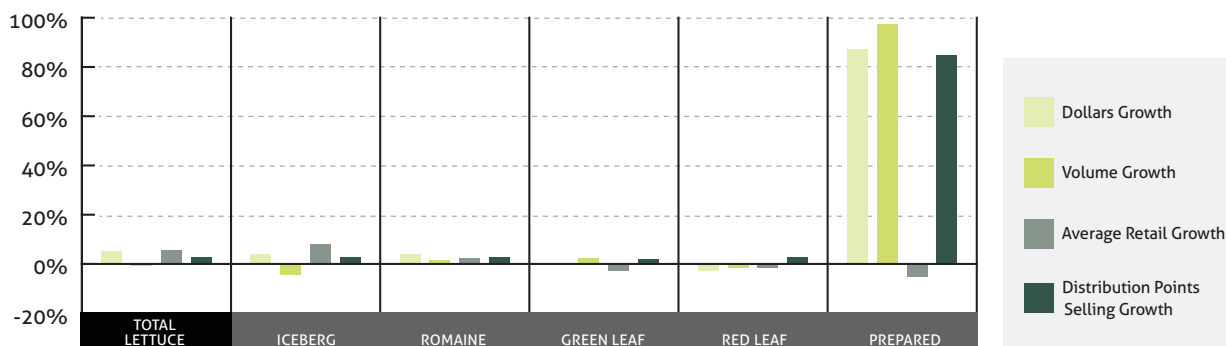
## Average Basket Size

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



## Trend Comparisons

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







# Expect More!

## *We Deliver*

Unmatched product quality & uniformity, daily

Longer shelf life and reduced shrink

Face & place convenience

Private labeling for top national brands

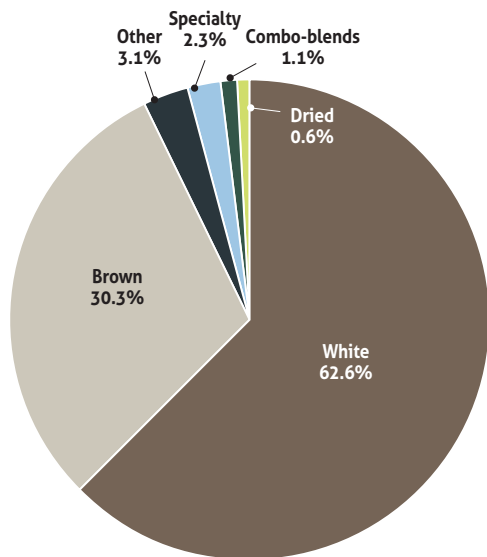






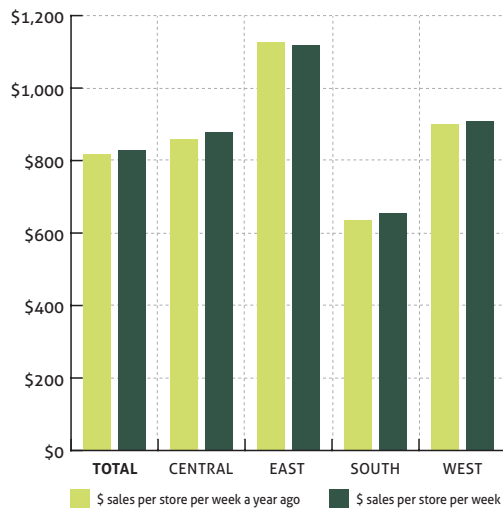
## Share of Category Dollars

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

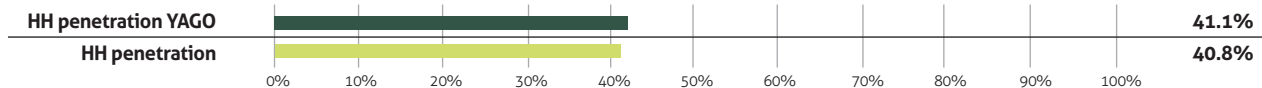


## Average Weekly Dollar Sales by Region

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

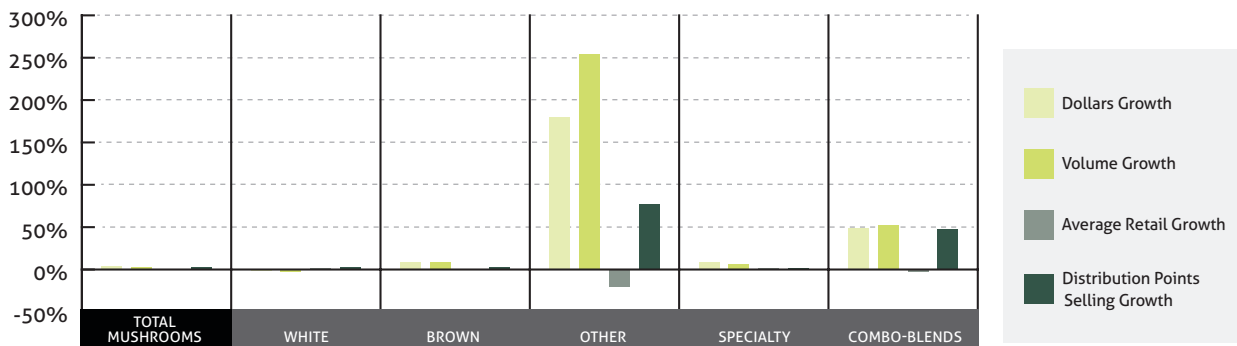


## Household Penetration Total U.S. for the 52 weeks ended 2/22/14



## Trend Comparisons

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







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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.

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800.330.5711 | [www.giorgiofresh.com](http://www.giorgiofresh.com)

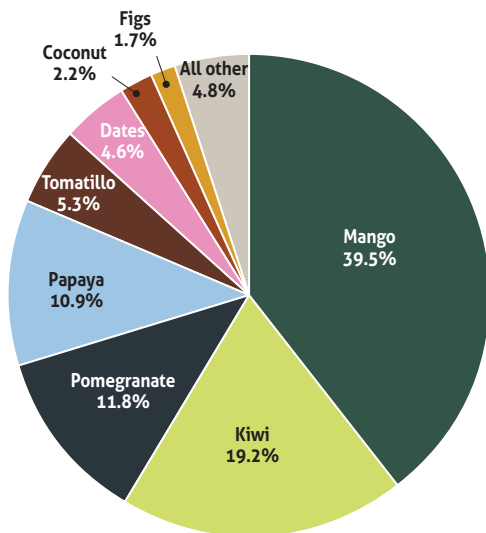


Equal Opportunity Employer



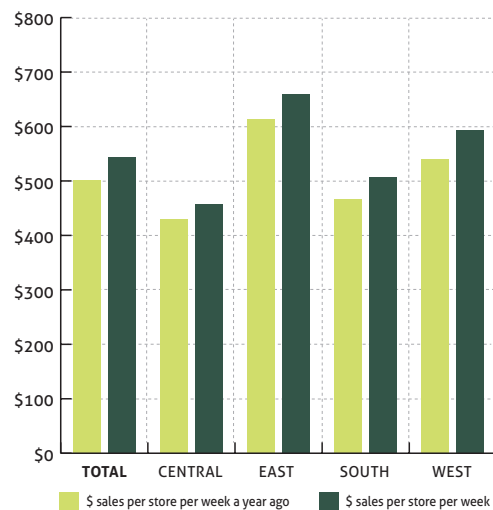
## Share of Category Dollars

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

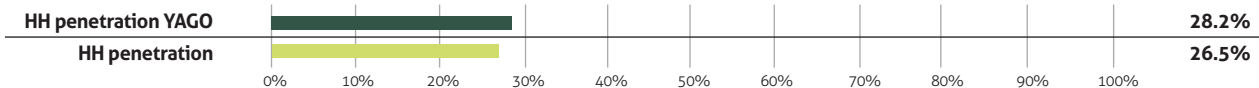


## Average Weekly Dollar Sales by Region

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

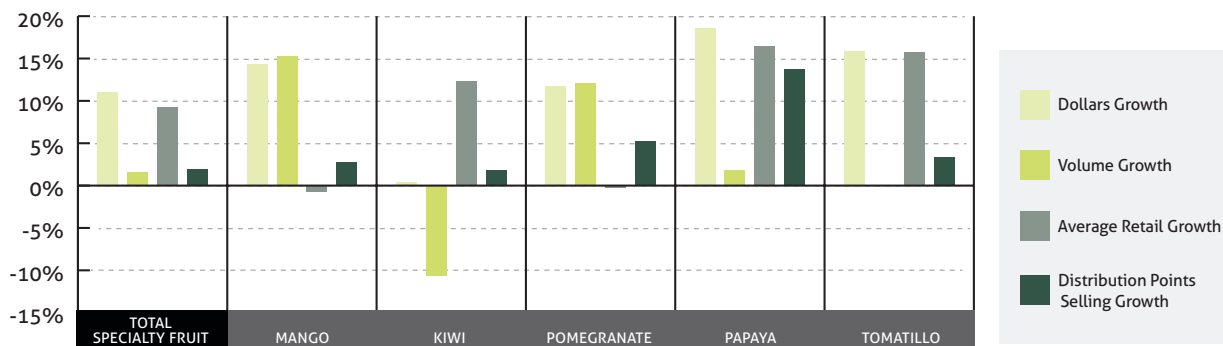


## Household Penetration Total U.S. for the 52 weeks ended 2/22/14



## Trend Comparisons

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







# “Growing The Freshest Specialty Fruits”

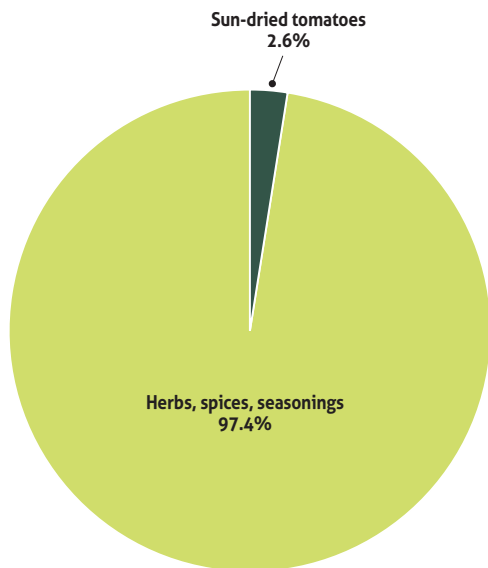


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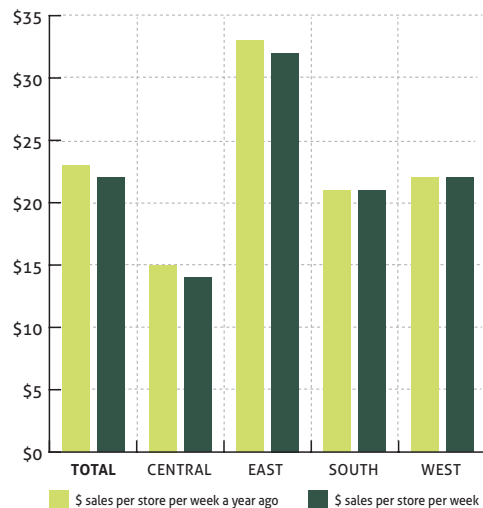
## Share of Category Dollars

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



## Average Weekly Dollar Sales by Region

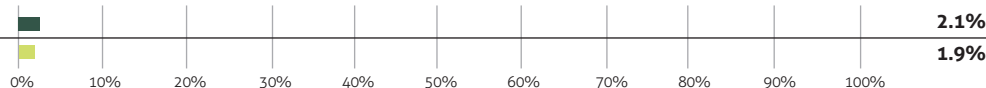
Total U.S. for the 52 weeks ended 2/22/14



## Household Penetration

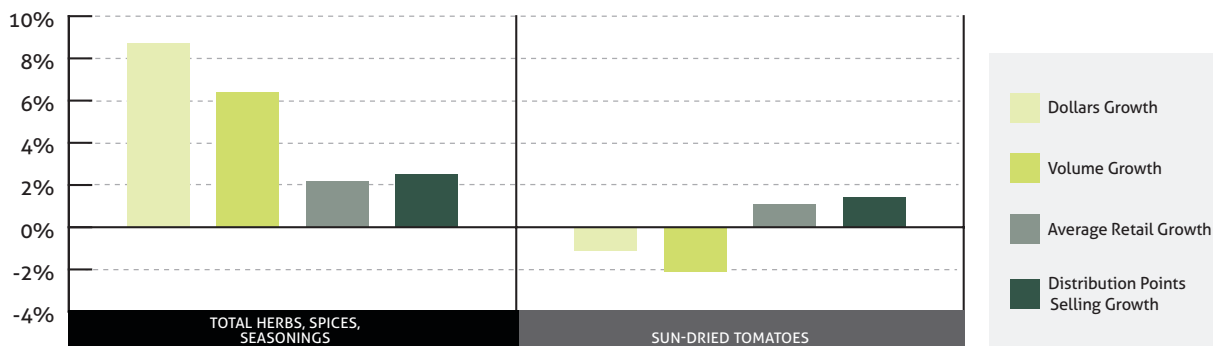
Total U.S. for the 52 weeks ended 2/22/14

HH penetration YAGO  
HH penetration



## Trend Comparisons

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







# 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
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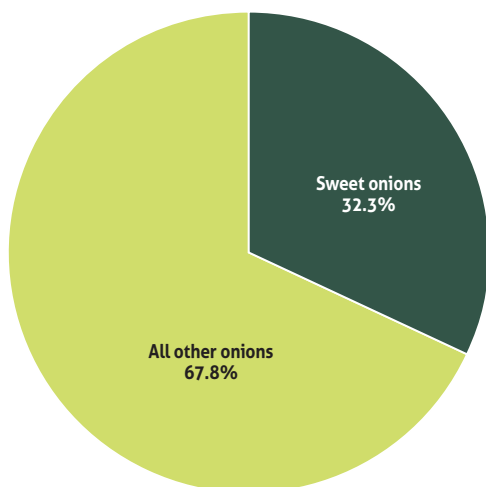
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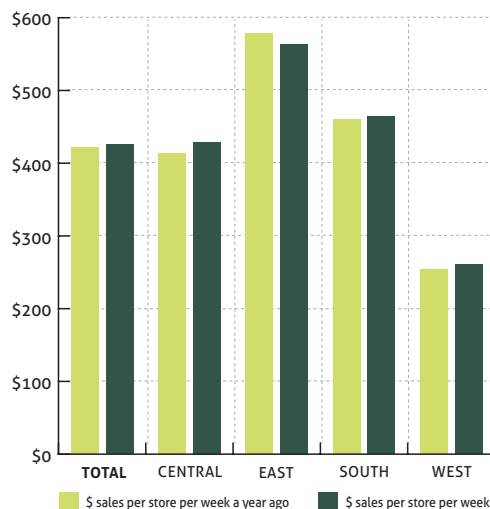
### Share of Category Dollars

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



### Average Weekly Dollar Sales by Region

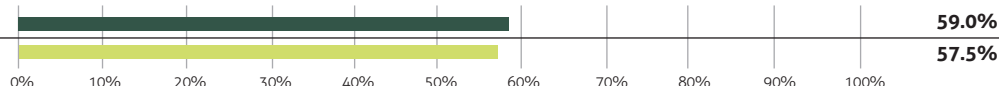
Total U.S. for the 52 weeks ended 2/22/14



### Household Penetration

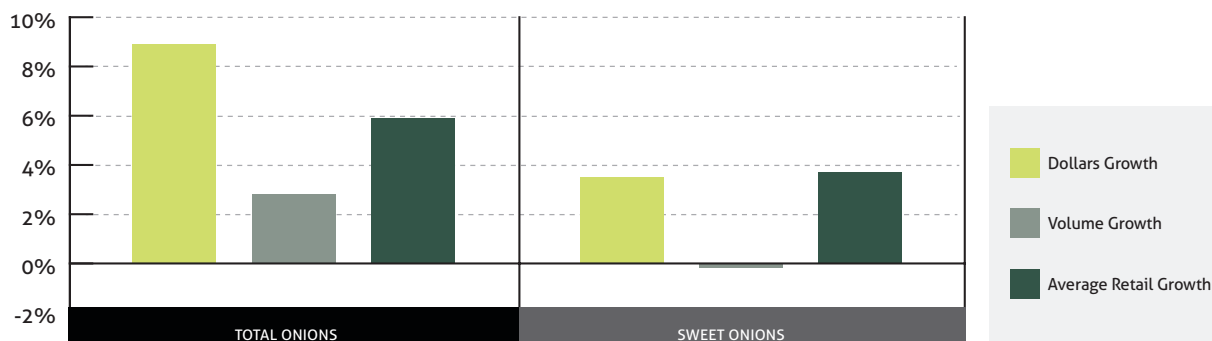
Total U.S. for the 52 weeks ended 2/22/14

HH penetration YAGO  
HH penetration



### Trend Comparisons

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





# 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](http://www.realsweet.com)



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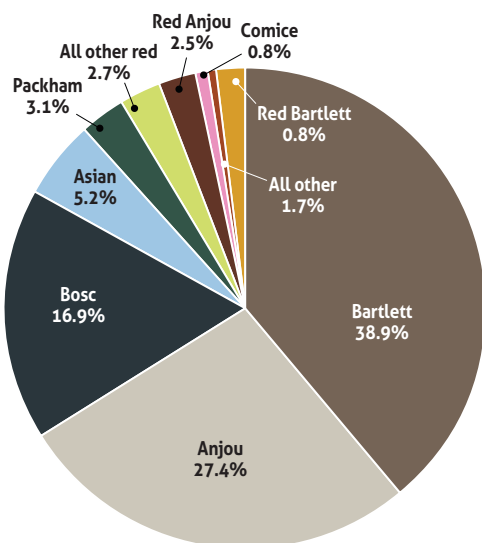






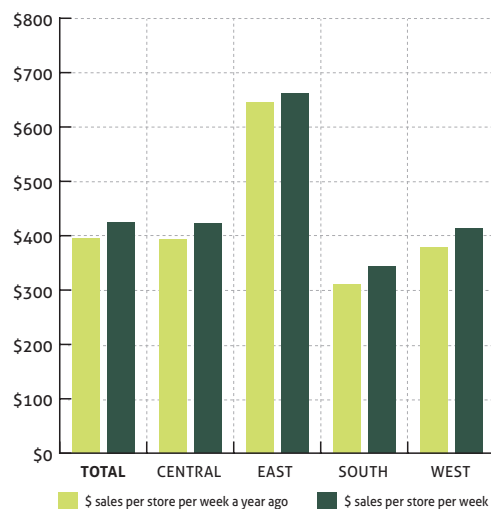
## Share of Category Dollars

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



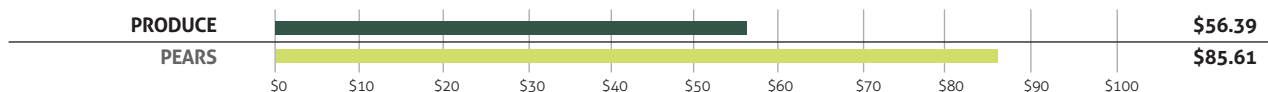
## Average Weekly Dollar Sales by Region

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



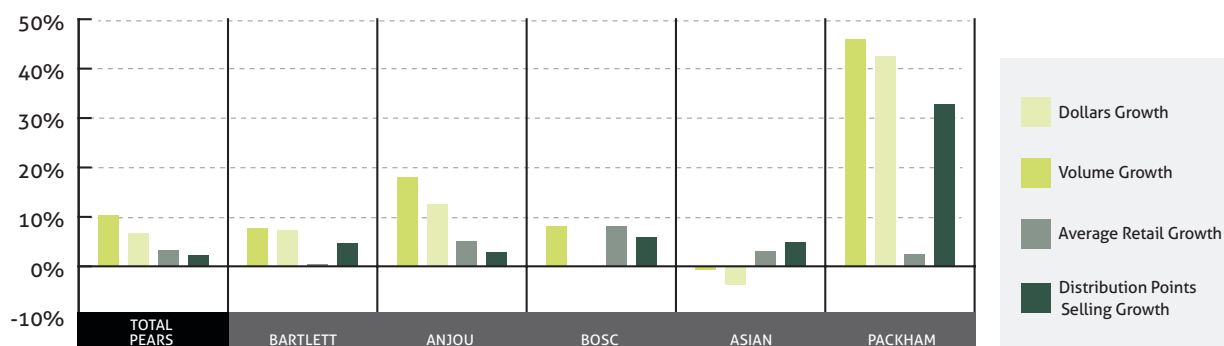
## Average Basket Size

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



## Trend Comparisons

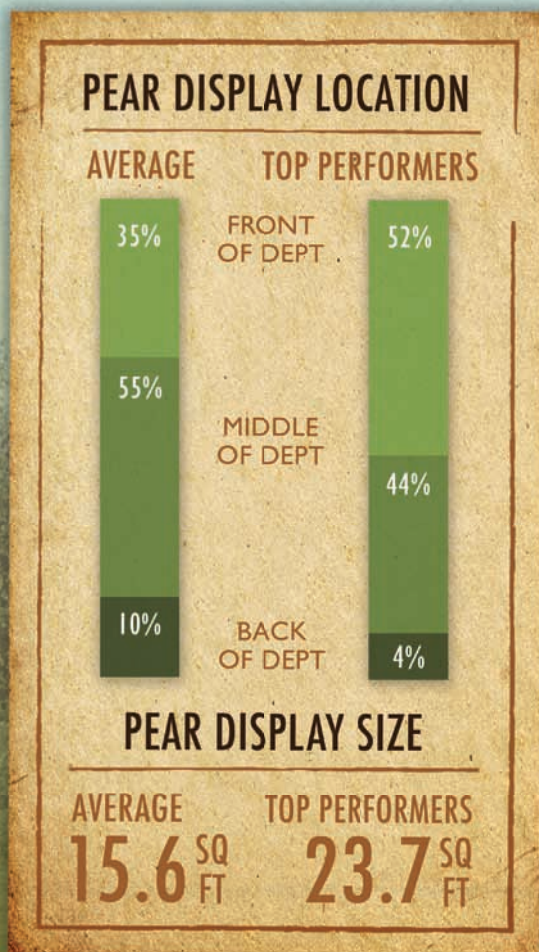
Total U.S. for the 52 weeks ended 2/22/14





# COMPARE YOUR PEARS

SEE HOW YOUR PEAR MERCHANDISING TACTICS  
MATCH UP AGAINST THE COMPETITION



### HOW DO YOUR PEARS PERFORM?

WHERE'S YOUR PEAR DISPLAY?

☐ BACK (0 PTS)    ☐ MIDDLE (5 PTS)    ☐ FRONT (10 PTS)

HOW BIG IS YOUR DISPLAY?

☐ <15 (0 PTS)    ☐ 16-22 (5 PTS)    ☐ >23 (10 PTS)

TALLY YOUR SCORE AND SEE WHERE YOU STAND.

0    5    10    15    20

BARELY MAKING IT    DOING ALRIGHT    PEAR MASTER

WANT A BETTER SCORE?  
THE PEAR BUREAU CAN HELP.

## THE PEAR BUREAU KNOWS PEARS



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.

All facts shown are results from category data research conducted by Pear Bureau Northwest during the period of Fall 2010 – Spring 2013.

Contact Us Today!

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profits@usapears.com



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usapears.org/experts

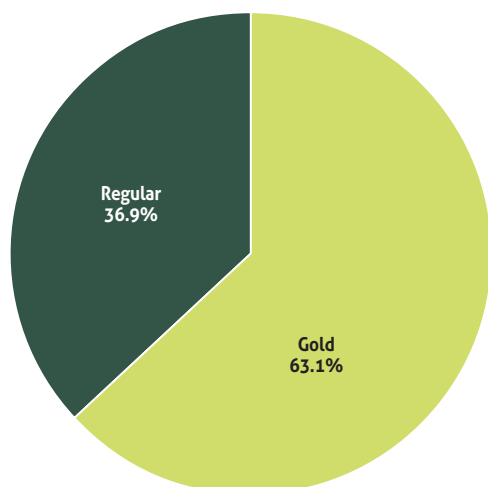




## PRODUCE | PINEAPPLES

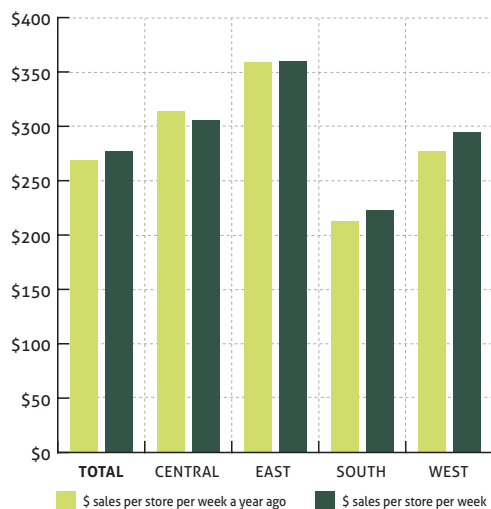
### Share of Category Dollars

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



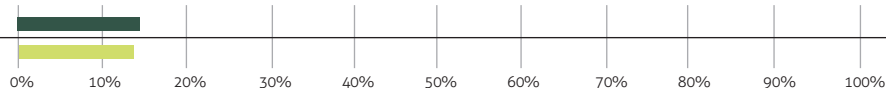
### Household Penetration Total U.S. for the 52 weeks ended 2/22/14

HH penetration YAGO

14.3%

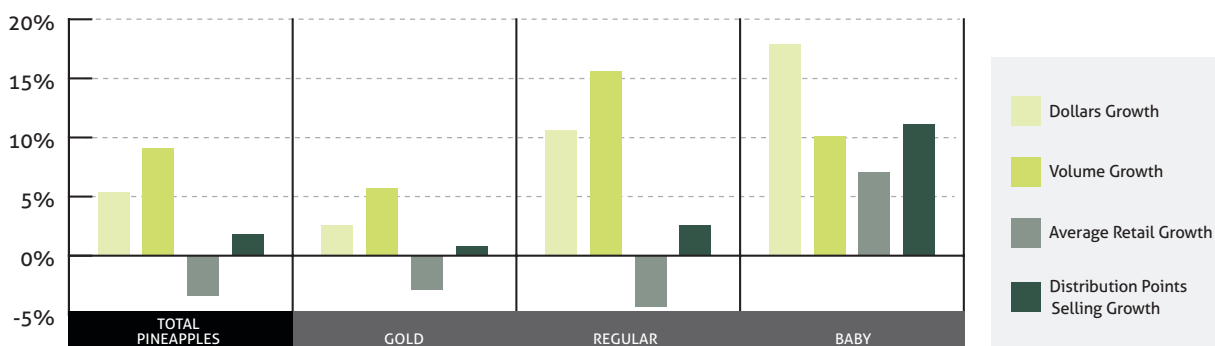
HH penetration

13.1%



### 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 Spire, a Datalogix company.





## Your Customer Experience

### 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.

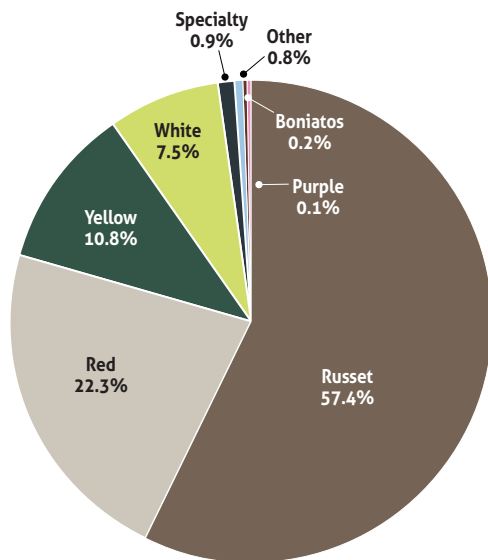
Go with Del Monte Gold® Extra Sweet Pineapple and you're as good as gold.





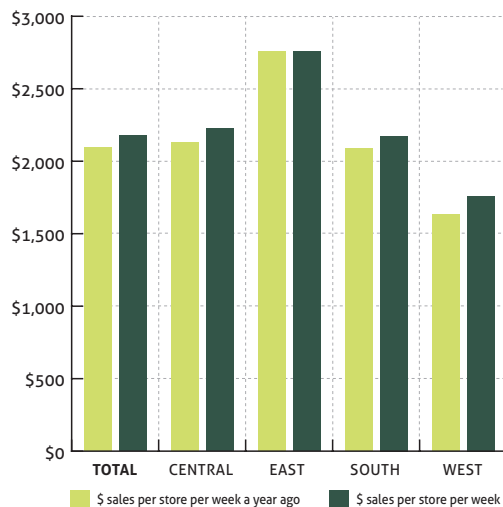
## Share of Category Dollars

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



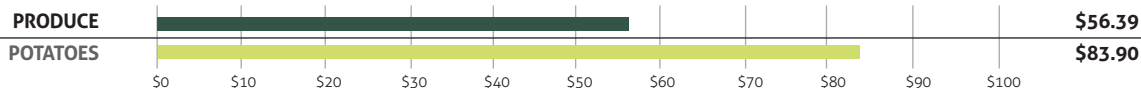
## Average Weekly Dollar Sales by Region

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



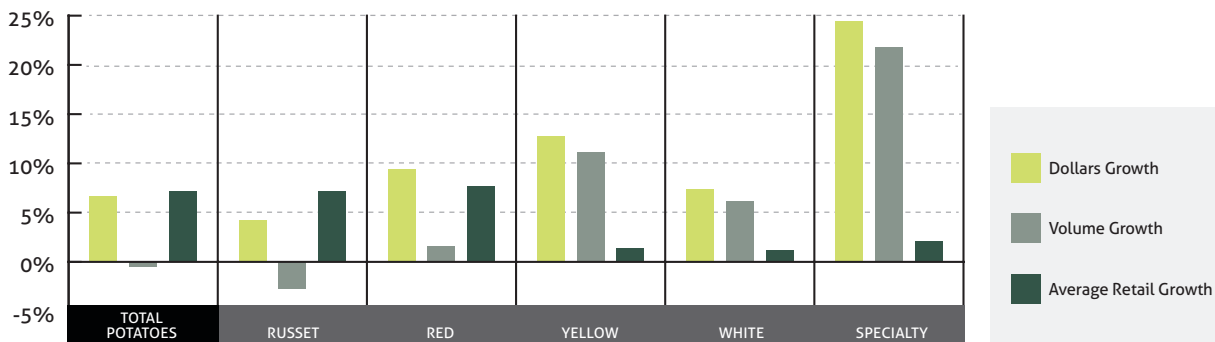
## Average Basket Size

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](http://www.klondikebrands.com)

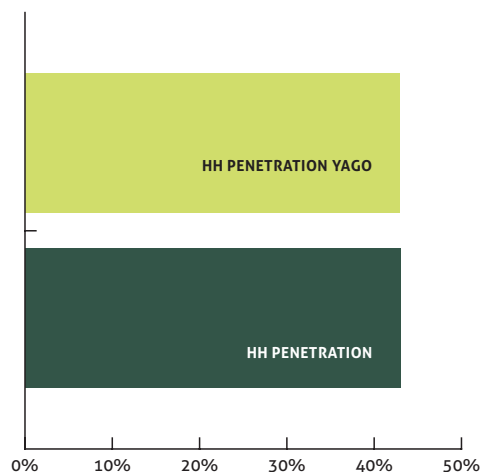


Potandon Produce L.L.C. 800-767-6104



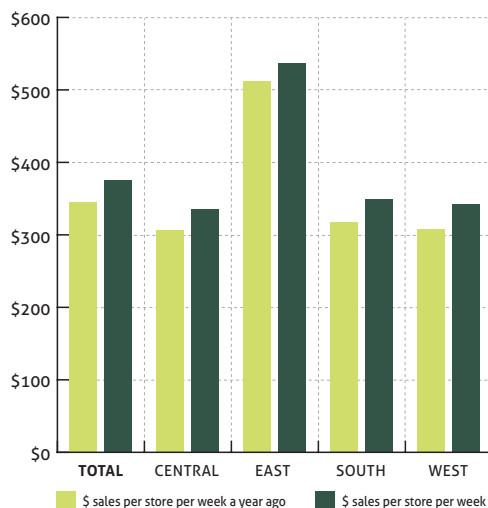
## Household Penetration

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



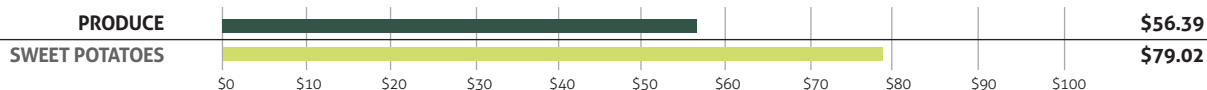
## Average Weekly Dollar Sales by Region

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



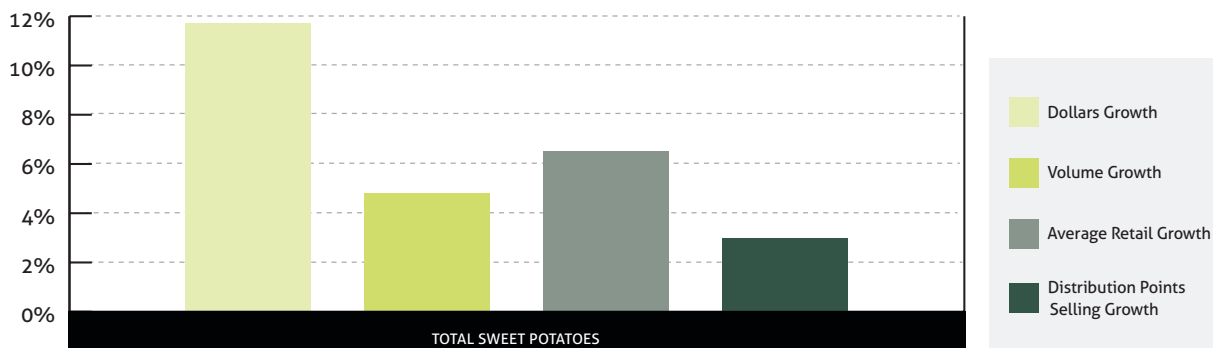
## Average Basket Size

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



## Trend Comparisons

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







# 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.*

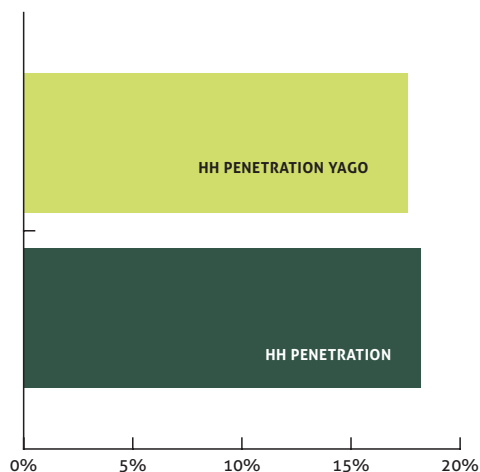


*1.800.VIDALIA - [www.BlandFarms.com](http://www.BlandFarms.com)*



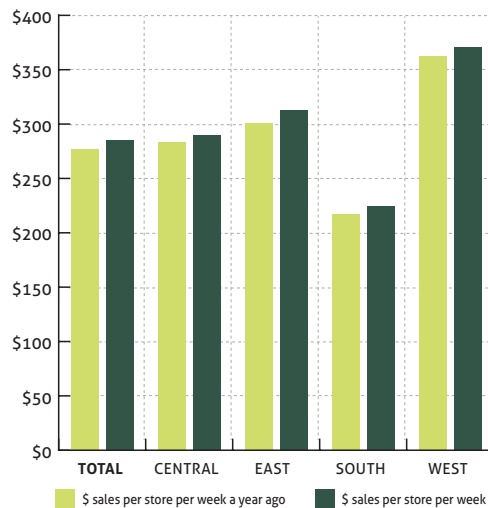
## Household Penetration

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



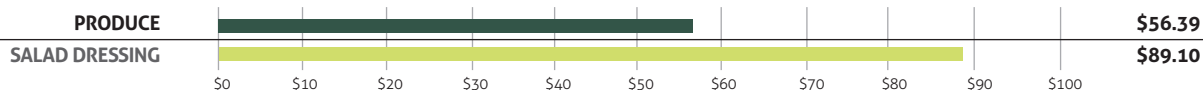
## Average Weekly Dollar Sales by Region

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



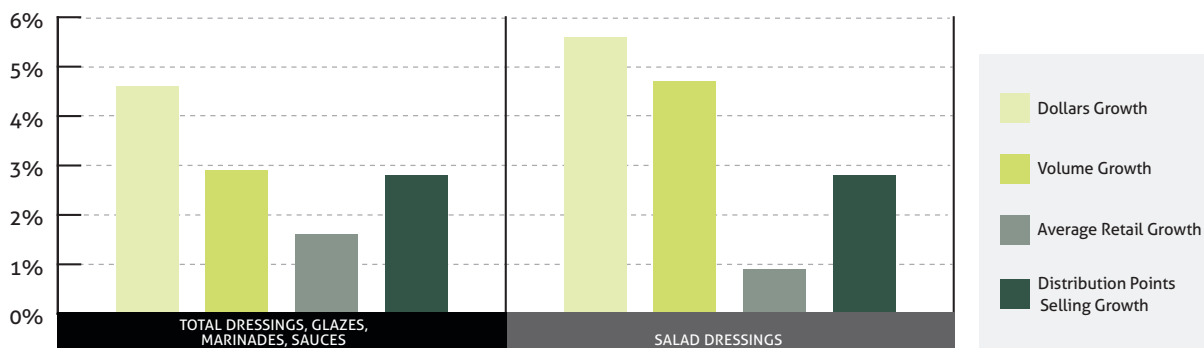
## Average Basket Size

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



## Trend Comparisons

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





# MARZETTI® BUILDS BUSINESS!

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

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

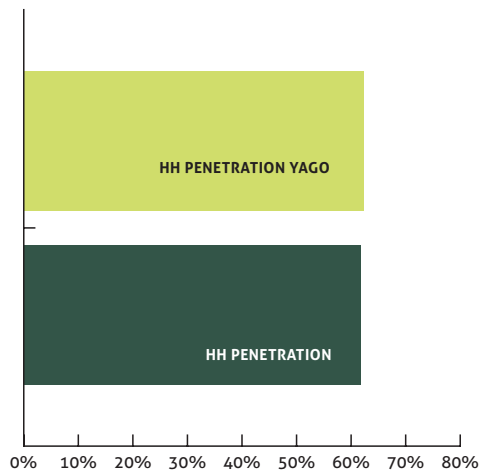
Based on IRI Total U.S. Multi-Outlet Dollar Sales ending 3/23/14.





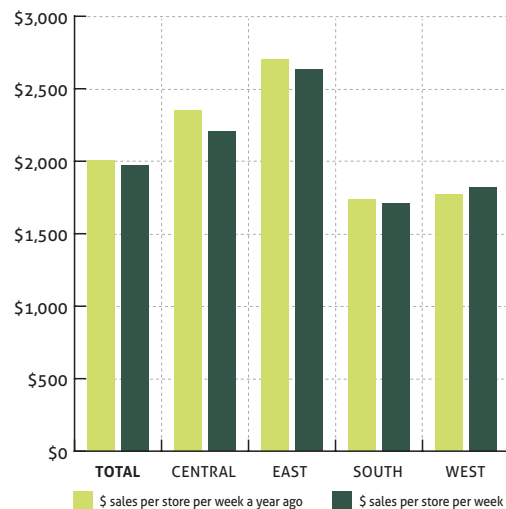
### Household Penetration

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



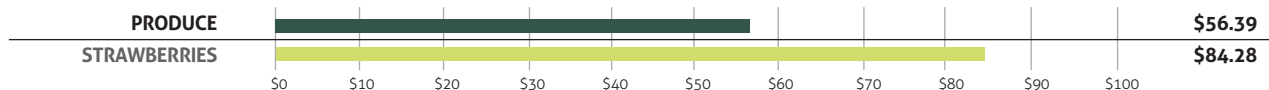
### Average Weekly Dollar Sales by Region

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



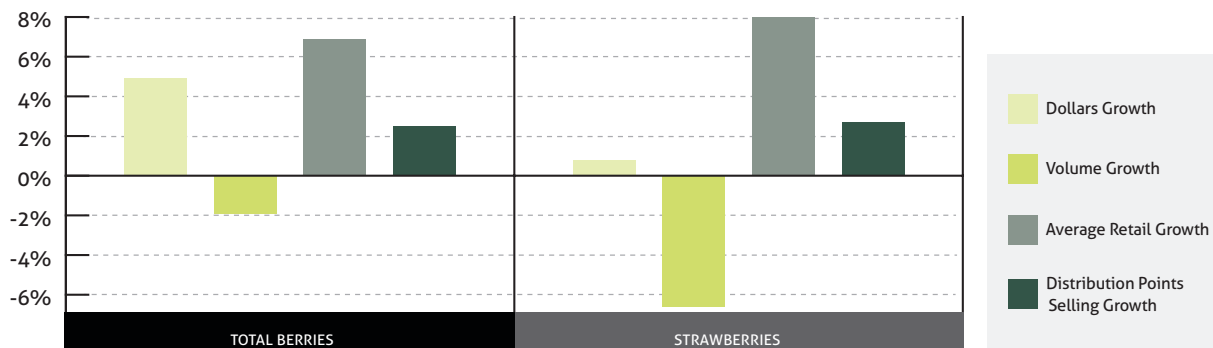
### Average Basket Size

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



### Trend Comparisons

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





# Who Doesn't Love A **JUICY STORY?!**



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BERRIES

## 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.



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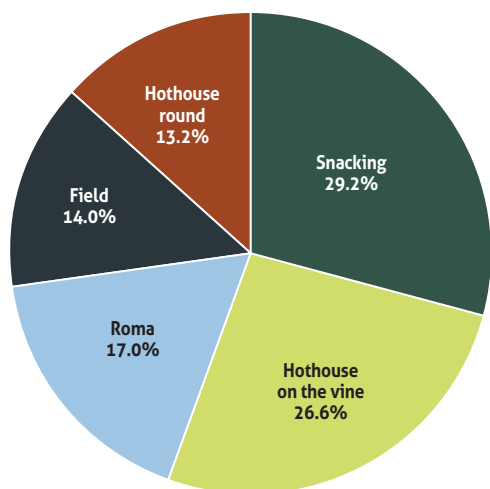




## PRODUCE | TOMATOES

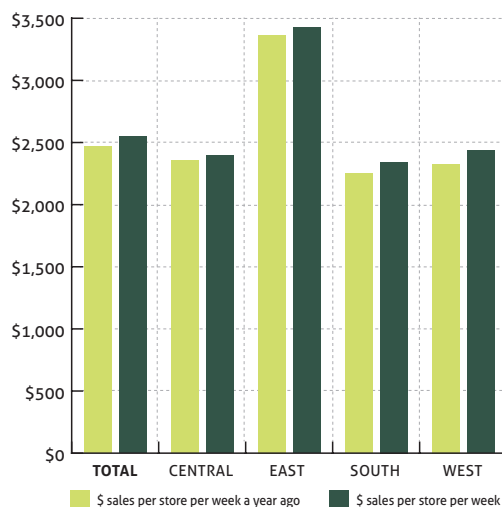
### Share of Category Dollars

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



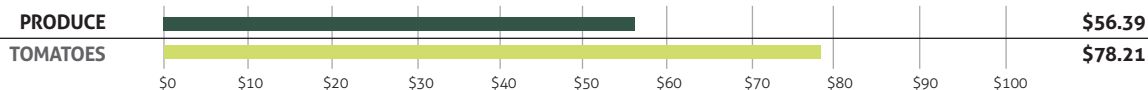
### Average Weekly Dollar Sales by Region

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



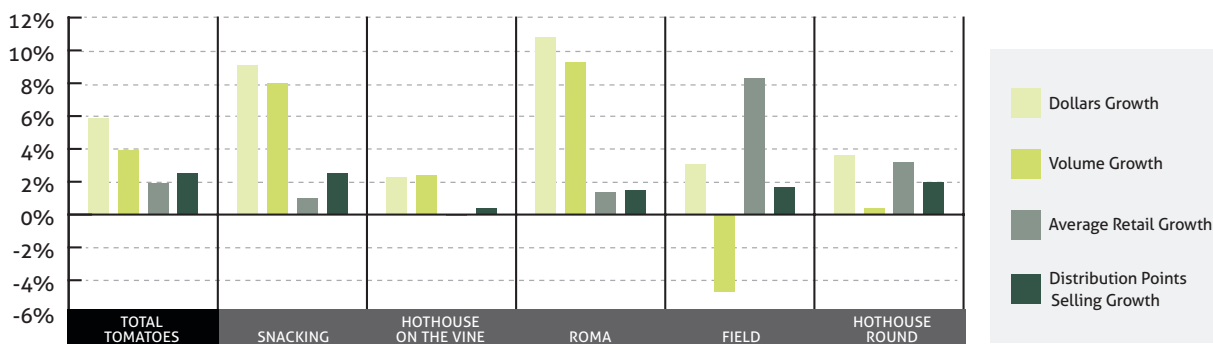
### Average Basket Size

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



### Trend Comparisons

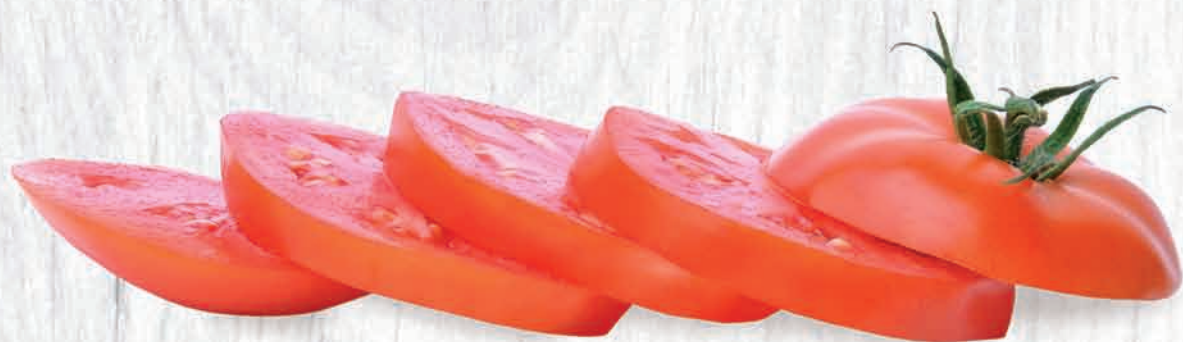
Total U.S. for the 52 weeks ended 2/22/14







**The perfect slice.**



*Direct from the Farm  
year round !*



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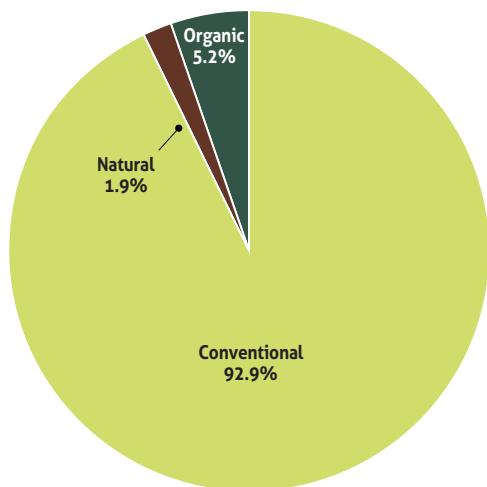


**primusGFS**<sup>TM</sup>  
when food safety counts



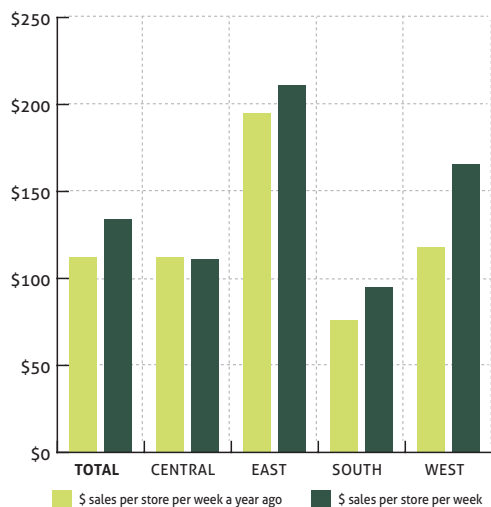
### Share of Category Dollars

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



### Average Weekly Dollar Sales by Region

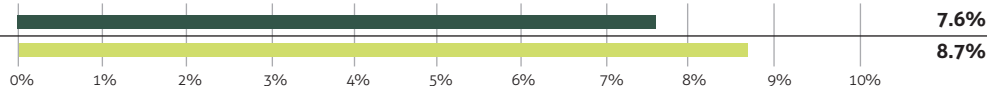
Total U.S. for the 52 weeks ended 2/22/14



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

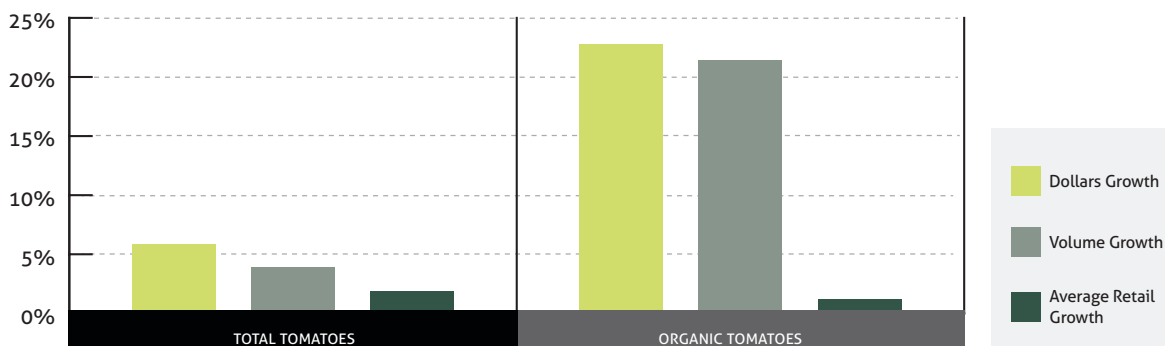
HH penetration YAGO

HH penetration



### Trend Comparisons

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



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# *We are* **ORGANIC** *to Our Roots*

*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.*



CERTIFIED 100% ORGANIC



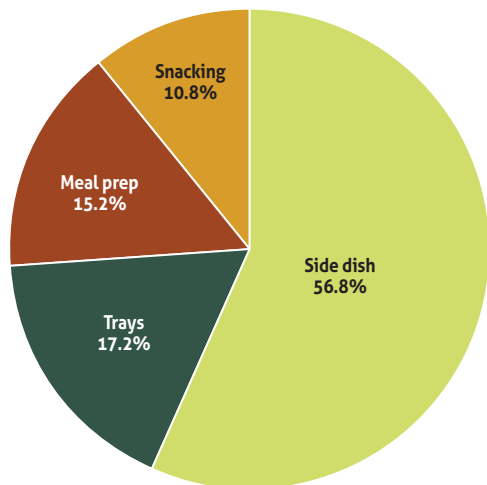
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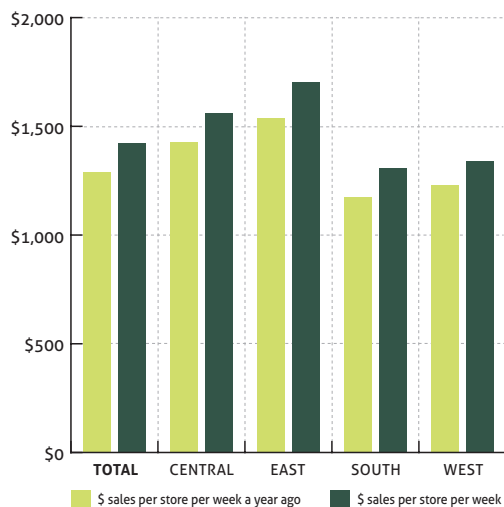
## Share of Category Dollars

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



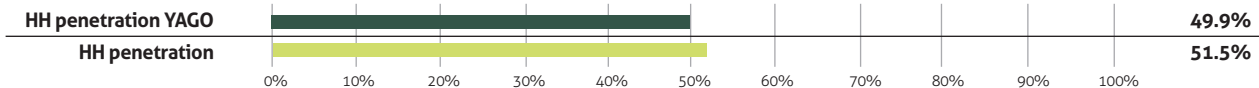
## Average Weekly Dollar Sales by Region

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



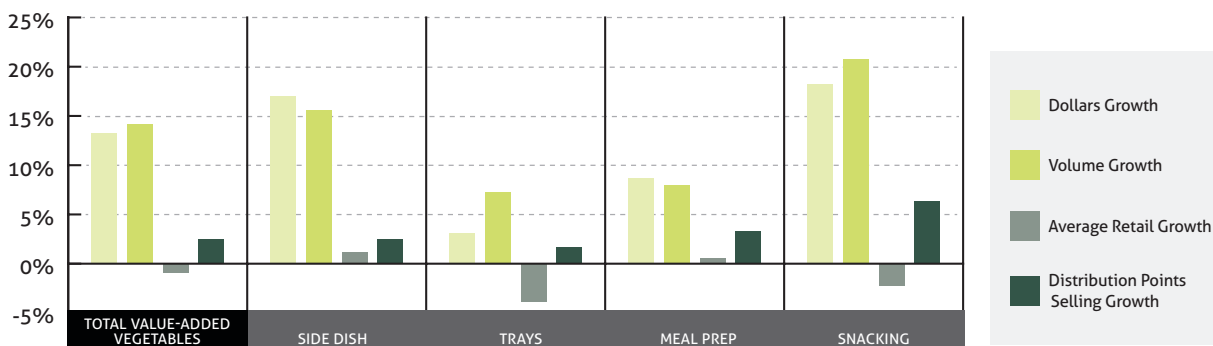
## Household Penetration

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



## Trend Comparisons

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





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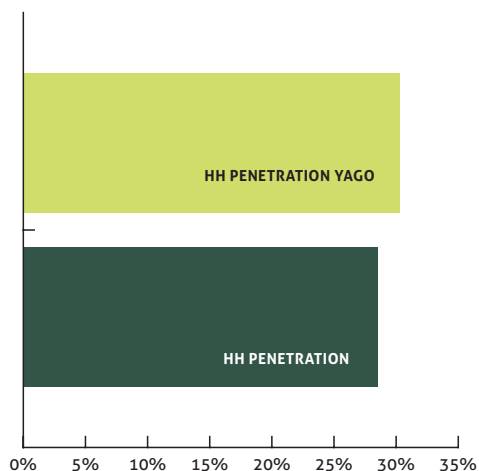
Contact us today to learn more | [www.apioinc.com](http://www.apioinc.com) | Eat Smart - 800.454.1355 | GreenLine - 419.353.2326





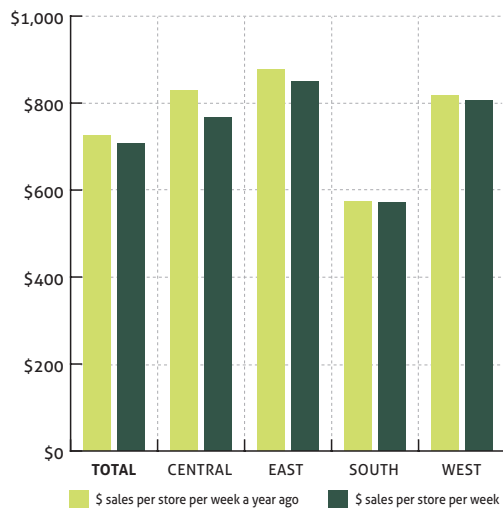
### Household Penetration

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



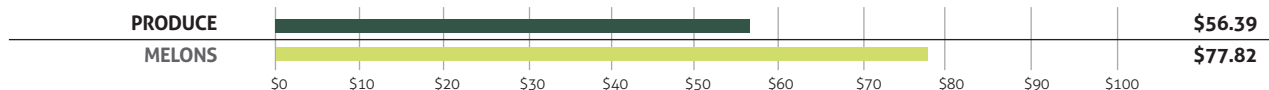
### Average Weekly Dollar Sales by Region

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





# 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.

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For recipe  
ideas, scan  
here.

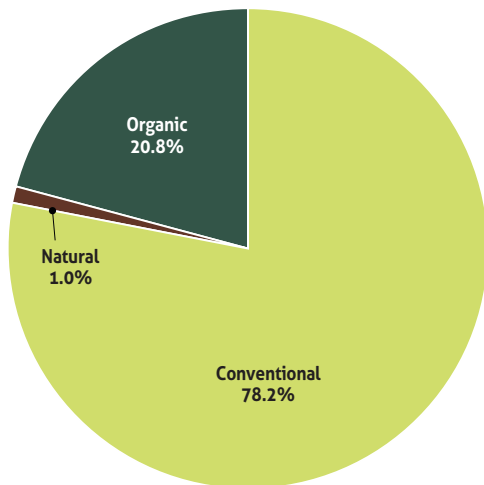
While many factors affect heart disease, diets low in saturated fat and cholesterol may reduce this risk.





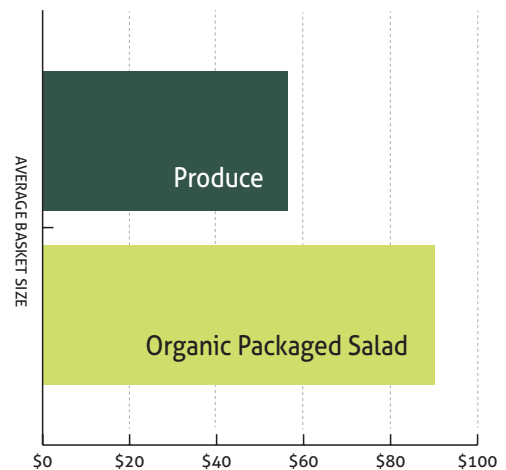
## Share of Category Dollars

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

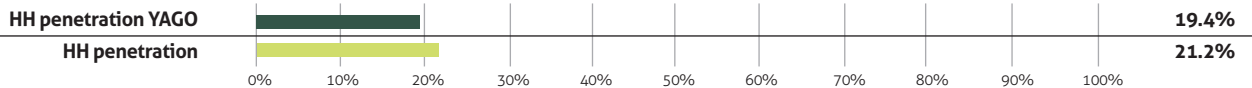


## Average Basket Size

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

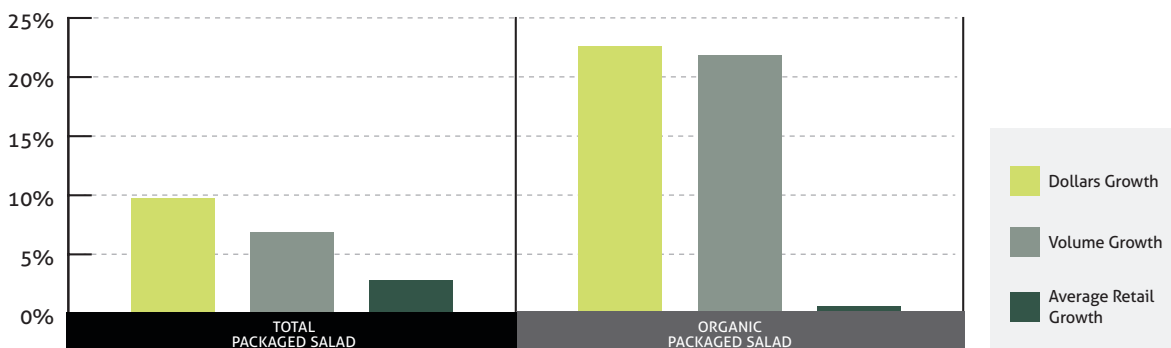


## Household Penetration Total U.S. for the 52 weeks ended 2/22/14



## Trend Comparisons

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





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