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HEALTH & WELLNESS WEBINAR

UNLOCKING CONSUMER ENGAGEMENT

TRENDS & DATA-DRIVEN STRATEGIES FOR INCREASED PRODUCE CONSUMPTION

With Jonna Parker, Mollie Van Lieu & Emily Holdorf, MS, RD

BROUGHT TO YOU BY THE FOUNDATION FOR FRESH PRODUCE

WELCOME!

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Katie Calligaro

Director, Marketing & Communications

Foundation for Fresh Produce

ABOUT HAVE A PLANT®

The award-winning Have A Plant® campaign is committed to helping consumers live happier, healthier lives by boosting appeal for fruits and vegetables.

Have A Plant® programs and our website fruitsandveggies.org are a valuable resource for health and wellness professionals.

MINNESOTA PRSA 2021 MINNESOTA PRSA CLASSICS

PRSA CHICAGO SKYLINE AWARDS

GOLDEN ARC AWARDS
Promoting excellence in agricultural public relations

PRSA SILVER ANVIL

In² SABRE AWARDS NORTH AMERICA

2020 BIG APPLE AWARDS
BUILDING BRIDGES TO THE FUTURE
PRSA

GOLD PLATE AWARD FMI Foundation

Leader MYPLATE NATIONAL STRATEGIC PARTNER

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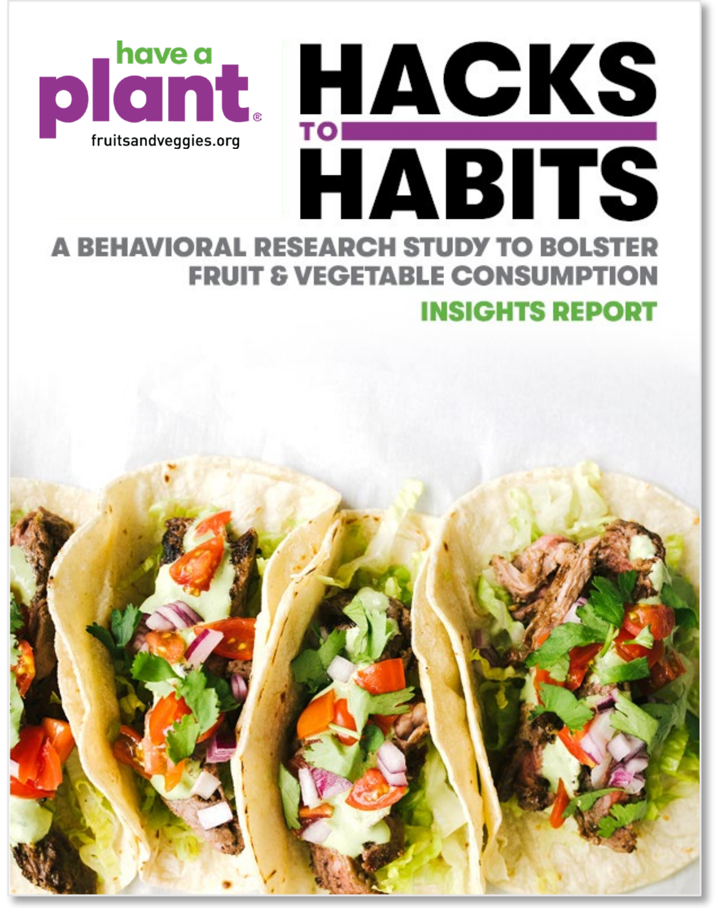
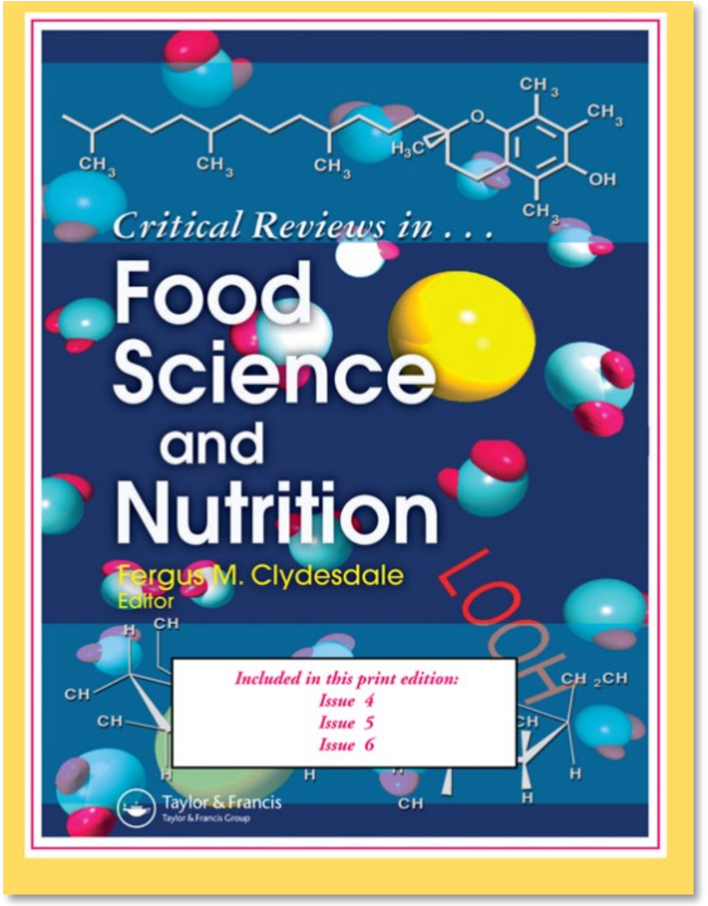
EDUCATIONAL RESOURCES

Have A Plant® programs deliver innovative research as well as unique consumer insights and communication tools. All to help you inspire lasting behavior change by tapping into the emotional connection consumers have with fruits and vegetables.





fruitsandveggies.org/educational-resources

HOUSEKEEPING

The CPE activity application for this webinar is pending Commission on Dietetic Registration (CDR) review and approval for 1.0 CPEUs.

You will receive a link to the certificate of attendance, the webinar recording and PDF of the presentation once approval has been granted.

Type your questions and/or comments into the Q&A section located at the bottom of your screen at any time during the webinar.

TODAY'S SPEAKERS

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Circana

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Influencer & Community Manager

TRENDS & DATA-DRIVEN STRATEGIES
FOR INCREASESD PRODUCE CONSUMPTION

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Circana covers the complete spectrum of food and beverage

Formerly separate companies, IRI and NPD are now Circana, and we are ready to turn the complex INSIGHTS into clear ACTIONS.

CONSUMPTION

who, what and how we cook

FOODSERVICE

where, what and how much we eat

RETAIL

where, who and how much we buy

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Today's discussion

01 2024 State of the Shopper

02 Current Retail Environment
Produce: Current and Potential

03 Current Sales & Shopper Trends
Current & Future Consumers

Questions? Ask at the end or after! ?

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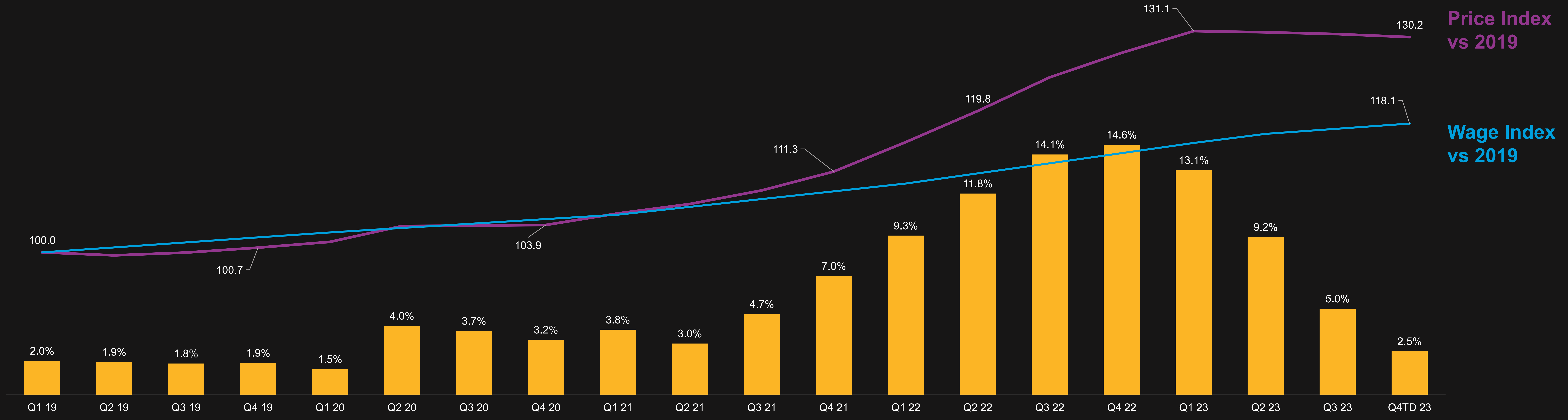
Current Consumer Market

Key Facts & Noteworthy Food/Bev News

Inflation in full swing

Consumers are facing close to 30% higher prices compared to 2019 and wages have not kept up.

Avg. Price % Change vs. YA



Source: IRI POS MULO+C data ending 12/03/23.
Note: Price per volume changes calculated at a category level (for categories that has equivalized volumes) and then dollar weighted to get total F&B and aisles

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Consumers continue to have more stoplights on their retail food and beverage journey

Retail food and beverage outperformed many consumer goods — but not all

Despite inflation and spending pressures, Americans still have expanded and shifting demand

Dollars
Unit / Volume

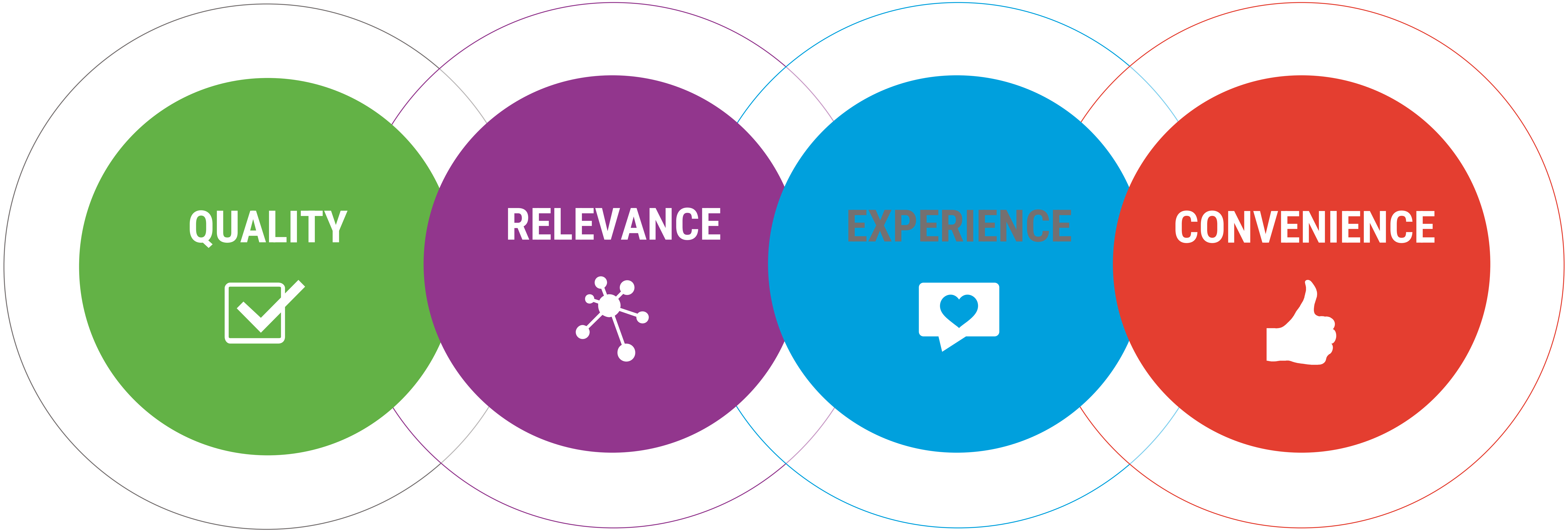
Gen Merch
CPG

Retail Segments 2023 Sales % Chg. vs. YA

Note: Volume sales and price per volume shown for CPG segments. Unit trends shown for general merchandise. Source: Circana, Retail Early Indicator, 52WE 12/30/2023 vs. YAG (general merchandise); Circana MULO+ with Cstore (F&B/Non-food CPG) 52 weeks ending 12/31/23. Circana Thought Leadership.

Dimensions of value: market beyond price

More than ever, driving demand must be multi-dimensional and anchored in consumer priorities



Source: FMI Dimensions of Value

How We Solve The Meal

in 2024

61%

of food spending occurs at retail **“at home”**

86% of eating occasions are sourced **from home**

39% of food spending occurs at foodservice **“away from home”**

14% of eating occasions are sourced **away from home / foodservice**

Source: Circana POS and consumer data Q2 2023.

86% of meals are sourced from home

However, shifting needs throughout the day causes this to fluctuate

% Meal Occasions Sourced from Home/Retail

87%	76%	81%
Breakfast occasion	Lunch	Dinner

Sources: Circana, National Eating Trends®, CREST®, YE Feb. 2024

Overall, snacking is up with mobility influencing where consumers purchase and consume

46%

of consumers snack 3+ snacks a day

Down 3ppts YA, but no change vs 5 years ago

Between-meal occasions		
	2023 annual occasions per capita	vs. 2020
Total Between Meal Occasions	809	+9
Sourced from Retail	745	+8
Consumed in Home	666	-14
Sourced from Foodservice	64	+1

CLICK HERE

Watch/download the full 2024 Snacking webinar here: [Exploring U.S. Consumer Snacking Trends: Insights and Future Strategies - Circana]

Source: Circana, National Eating Trends® and CREST®, YE Dec. Includes retail and foodservice occasions; Circana 2024 Snacking Survey

Generations are also eating differently

% of Eatings When Need State is Favorite Routine, Yummy, or Reward Me

Year Ending Sept 2023 vs. 2018 Change vs. YA







Gen Alpha	Younger Gen Z	Older Gen Z	Younger Millennials	Older Millennials	Gen X	Boomers
2013 – cur 2 years	Born 2006 – 2012	Born 1997 – 2005	Born 1990 – 1996	Born 1981 – 1989	Born 1965 – 1980	Born 1946 – 1964
15.2%	**13.9%**	**8.5%**	**7.3%**	**8.8%**	**19.4%**	**23.7%**
+8.2% pts	+0.4% pts	-6.4% pts	+1.2% pts	-0.7% pts	+2.0% pts	-2.6% pts

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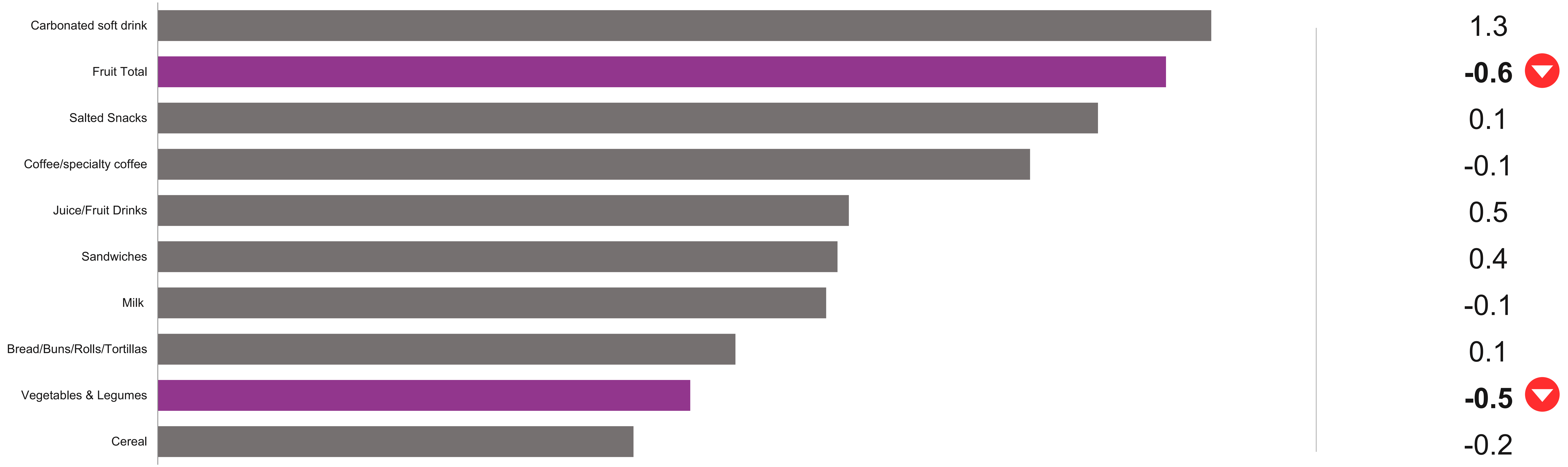
Source: Circana, SnackTrack®

Healthier eating aspiration isn't automatically changing our consumption- especially in produce

***Water, whether tap or bottled, is the number one thing we consume, at 43% of all occasions.**

Top 10 Foods and Beverages 2023 In-home Share of Occasions	Share Point Change vs. Last Year



Source: Circana, National Eating Trends®, YE March 2023

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How We Shop for Food & Bev
in 2024

Perception is U.S. consumers' reality

Agree food costs too much; differ on what to do about it

95%

of all households are **concerned** about food cost inflation in 2024, **70%** say its harder to stay in budget compared to prior months

85%

Say they've seen prices increase in recent months, despite the actual ARP down- **+10 pts from Dec 2023**

84% Making one or more changes due to increased grocery prices, +5 pts in one month

95% of shoppers age 33 and younger

51%

Shoppers age 34-42 bought at least some of their groceries online in March vs. less than 25% of shoppers age 59 & older

Source: Circana Monthly Primary Shopper Surveys, through March 2024

214

Annually by U.S. avg. household for food and beverage at any retailer

Fresh foods* average **147** trips per year per US Household **+11%** vs 3 years ago and **+2.3 trips** more than last year

+22 more trips (+12%) than 3 years ago and +4 more in 2023 than 2022

Produce has 84 trips annually (+7 vs 3YA) and is the only Fresh Dept with +1 trip more vs YA;
meat and seafood trips are **lower** than 3 years ago

Source; Circana, Integrated Fresh Scan Panel, All Outlets w MULO+, 52 weeks ending 4/21/24

**Fresh Foods are all PRM departments ex Refrigerated/Dairy*

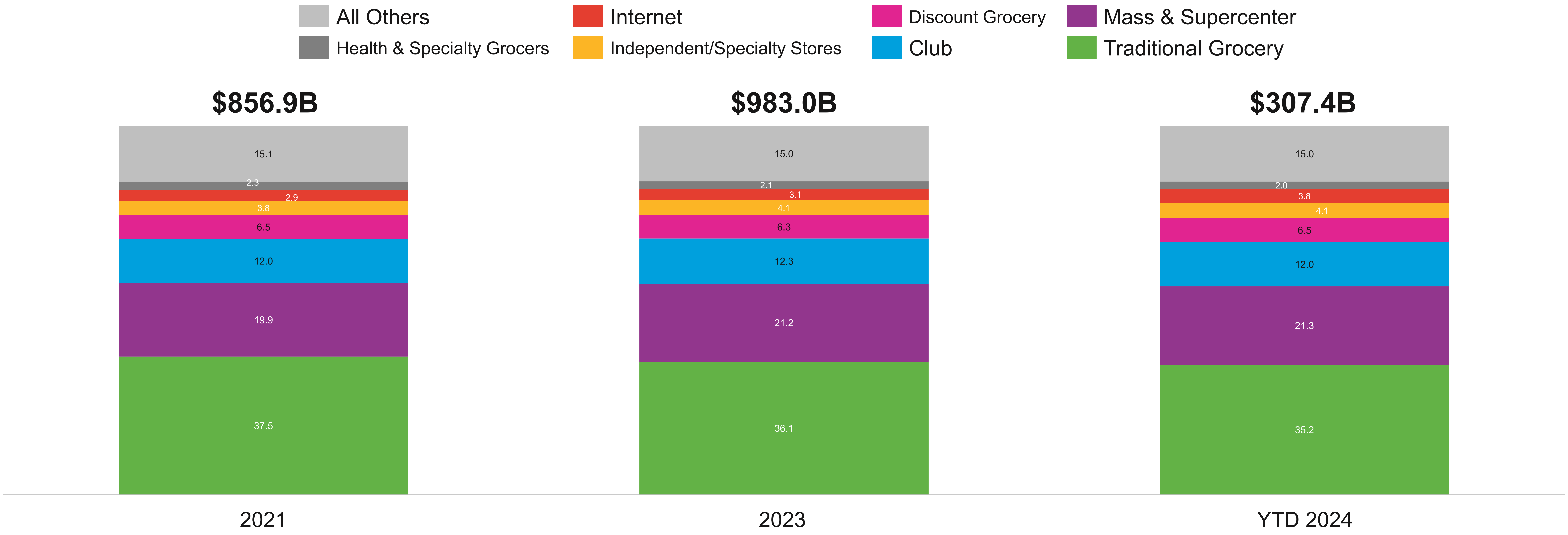
80%

of the most frequently purchased fresh foods items are in **Produce** – and the only fresh department to **increase** and **sustain** more trips since 2019

Source: Circana Household Scan Panel as of YE 2023 vs 2019

Traditional Grocery continues to erode share of total fresh foods in 2024

Total edible has gained dollar share in Internet, Discount Grocery and Mass/Super in recent periods



Source: *OmniConsumer Integrated Fresh CY 2021-2023, L52W, YTD 2024, L13W, L4W data ending 04/21/24, All Outlets.*

How Does Produce Perform vs Other F&B Departments?

YTD Sales Total Food & Beverage Performance

All Departments outside of Beverages, Seafood, and Liquor are growing in volume sales, and Floral is seeing double digit growth (+10.4%).

Source: Circana Integrated Fresh, Mulo+, L52 4/21/24.

YTD Sales Total Food & Beverage Shopping Behavior

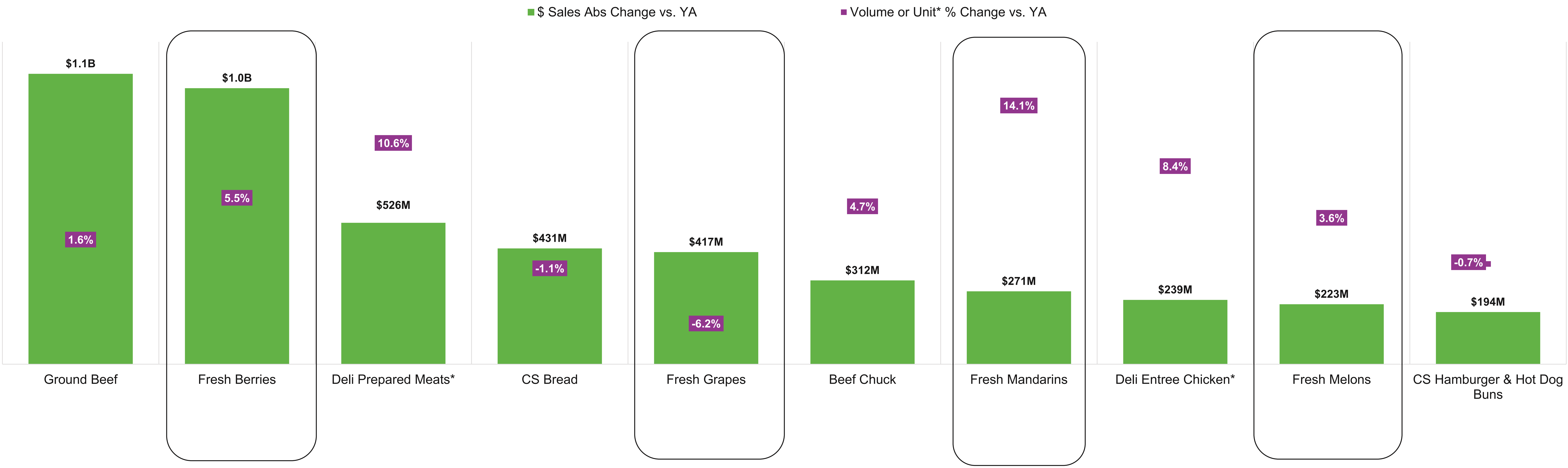
YTD, all Departments outside of Beverages, Seafood, and Liquor are growing in volume sales, and Floral is seeing double digit growth (+10.4%).

	HH Penetration	Chg	$ Per Buyer	% Chg	Product Trips/Buyer	% Chg	Unit Sales/Trip	% Chg
Edible	100.0	-	$7,775	+2.4%	214.2	+2.0%	9.2	-2.4%
General Food	99.9	+0.1	$2,072	+3.8%	124.7	+1.3%	5.2	-2.3%
Beverages	99.9	+0.1	$975	+4.2%	85.1	+0.6%	3.0	-1.2%
Meat	98.3	-	$848	+1.0%	53.2	+0.1%	2.3	-0.2%
Refrigerated	99.3	+0.2	$778	-1.5%	74.7	+0.6%	3.2	-0.8%
Produce	99.0	-	$753	+2.3%	84.1	+1.7%	3.1	-0.9%
Frozen	98.7	+0.1	$698	+0.4%	49.0	-1.8%	3.0	-0.3%
Total Deli	98.7	+0.2	$660	+5.3%	57.4	+2.4%	1.7	-0.4%
Bakery	99.5	+0.1	$425	+4.0%	65.0	+0.1%	1.8	-0.7%
Seafood	55.0	-1.3	$133	-2.9%	8.6	-2.9%	1.3	+0.8%

Source: Circana Integrated Fresh PNL, All Outlets, L52 4/21/24.

Produce Has Top Sales Growth Categories but Mixed Volume Results- Supply & Price Driving More than Demand

Top 10 Categories by dollar change growth. Ground Beef and Berries account for over $2B



Source: Circana Integrated Fresh, MULO+, Latest 52 weeks ending 4/21/2024, note Units used when volume is not equivalized at the dept level. Beverages, Meat, Produce and Seafood are in volume.*

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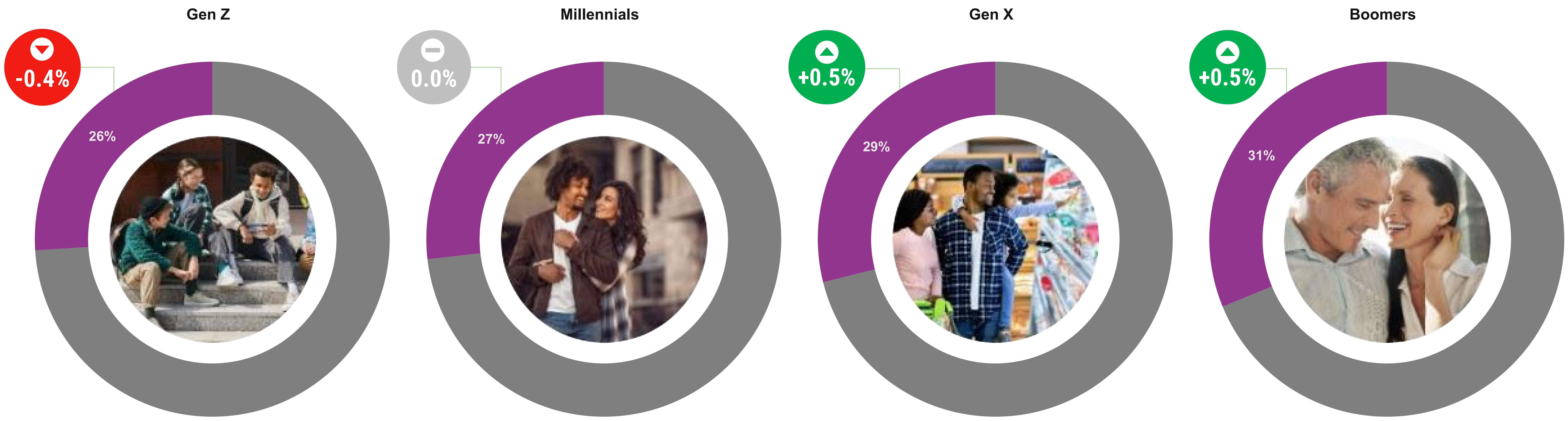
Younger generations are less invested in fresh

Total food/beverage average trip spending favors center-store more than older generations & declining

% of $ Basket Spent on Fresh Departments
$ Share with Change versus Year Ago



Source: Circana OmniConsumer Integrated Fresh Scan Panel, Total US All Outlets, 52 weeks ending 04-21-2024

Are We Satisfied with Status Quo?

The Broader Business World, and Consumers, Are Not

THE WALL STREET JOURNAL.

Cool Comes to the Humble Produce Aisle

Fruits and vegetables are the latest section of the supermarket to get a branding push as investors and marketers target the agriculture industry

"This isn't 'designer' produce with designer price tags… It's the everyday apple, now with a Pepsi-style marketing strategy."

Link to Article, 4/16/24 : https://www.wsj.com/articles/cool-comes-to-the-humble-produce-aisle-16831247

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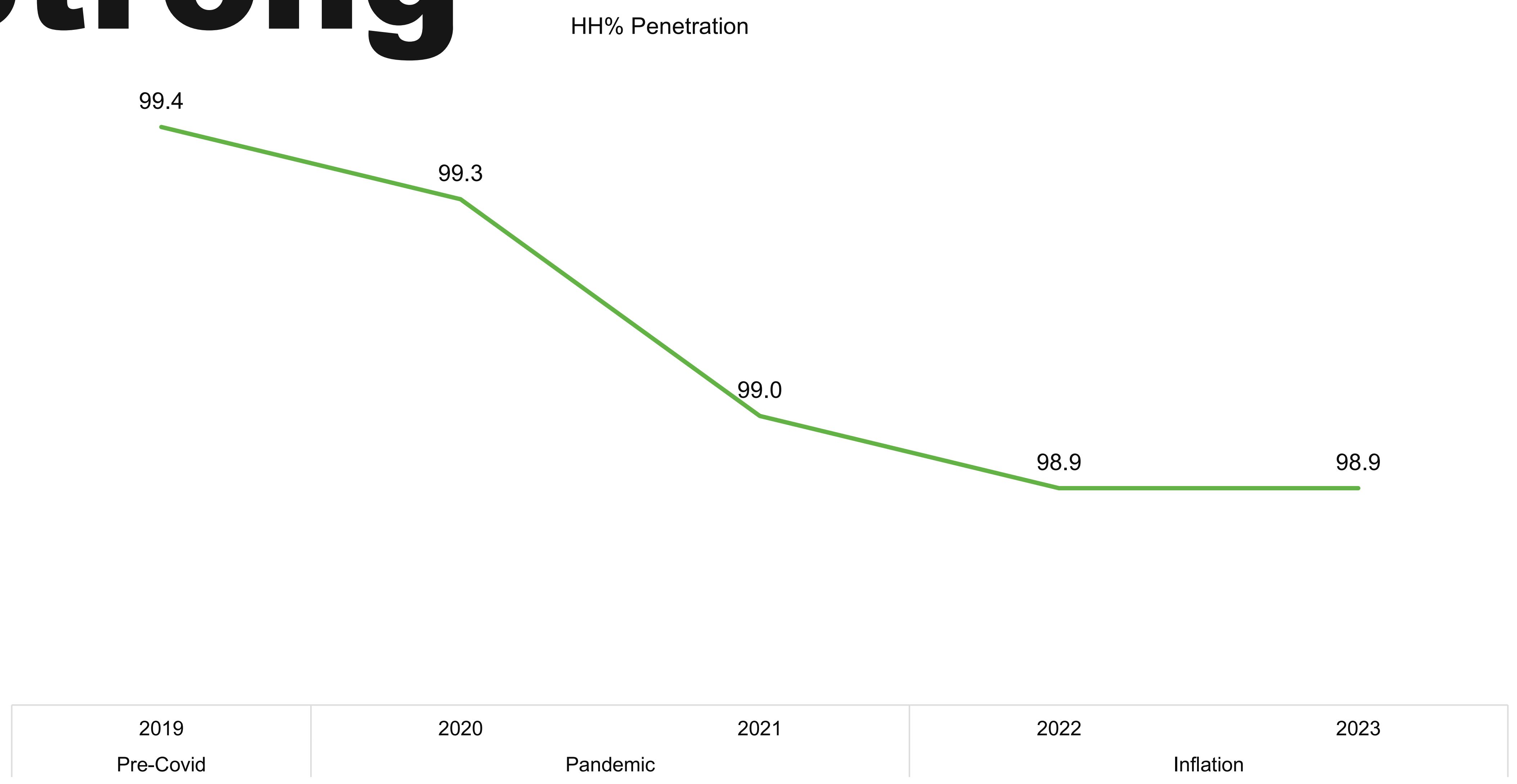
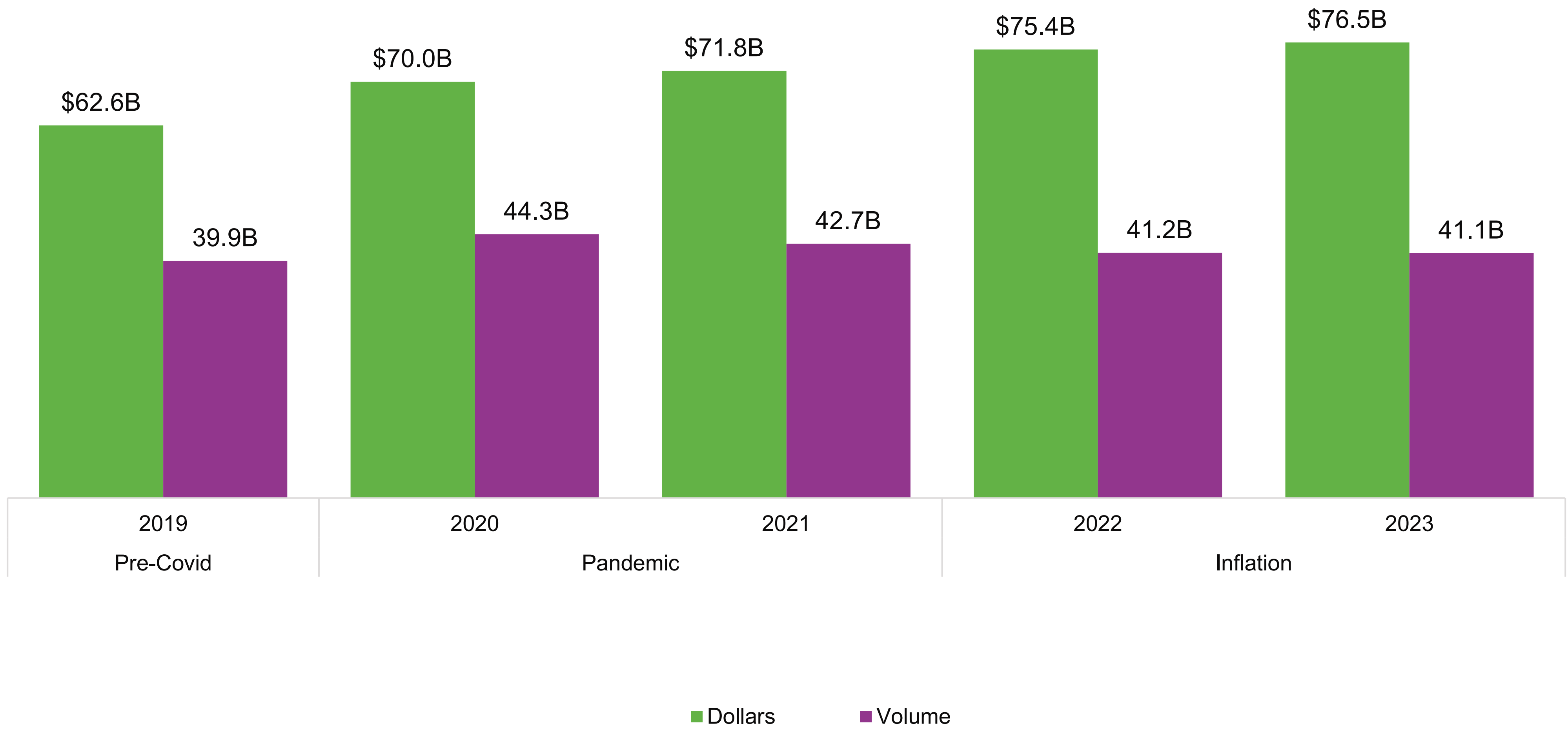
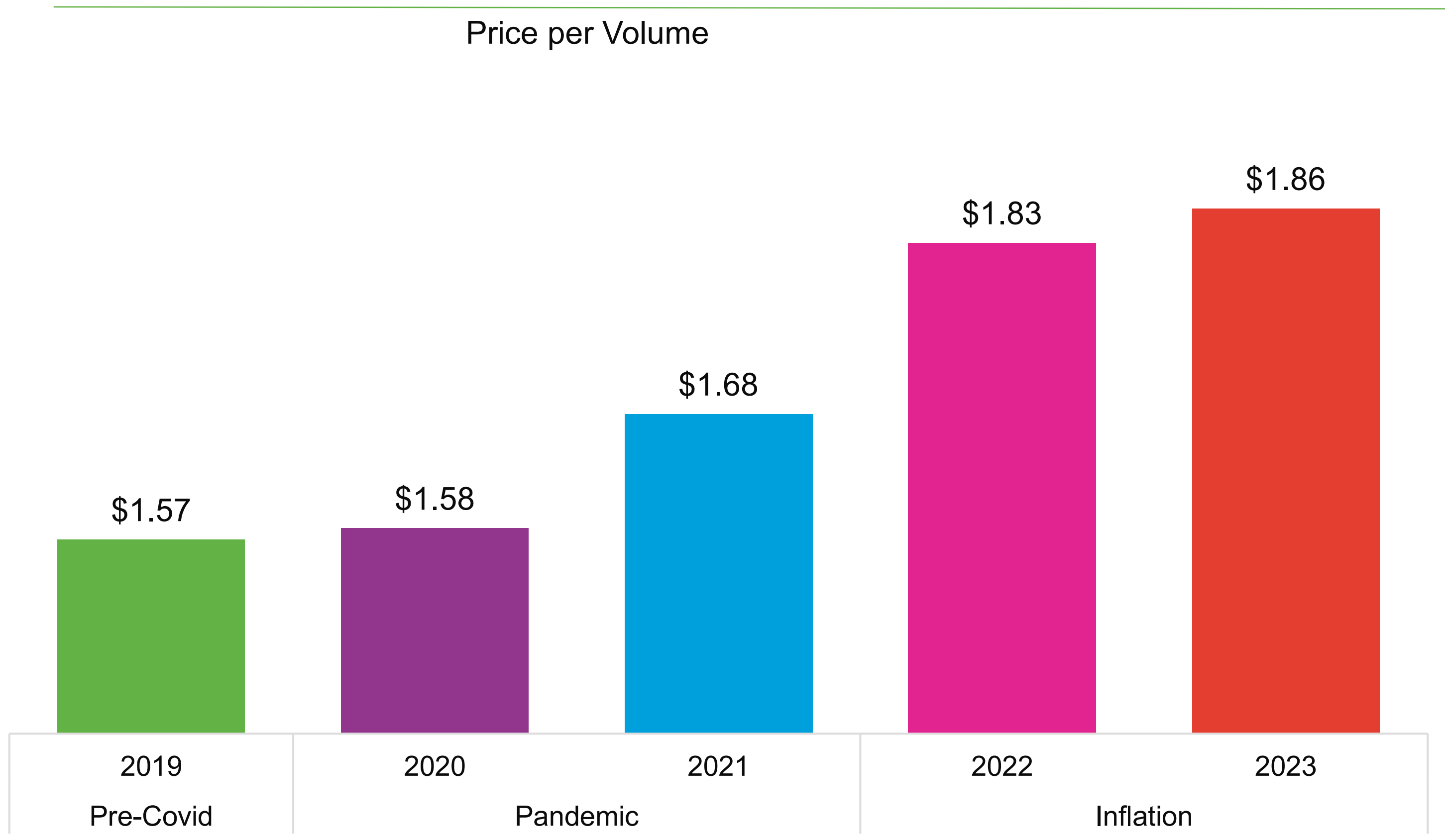
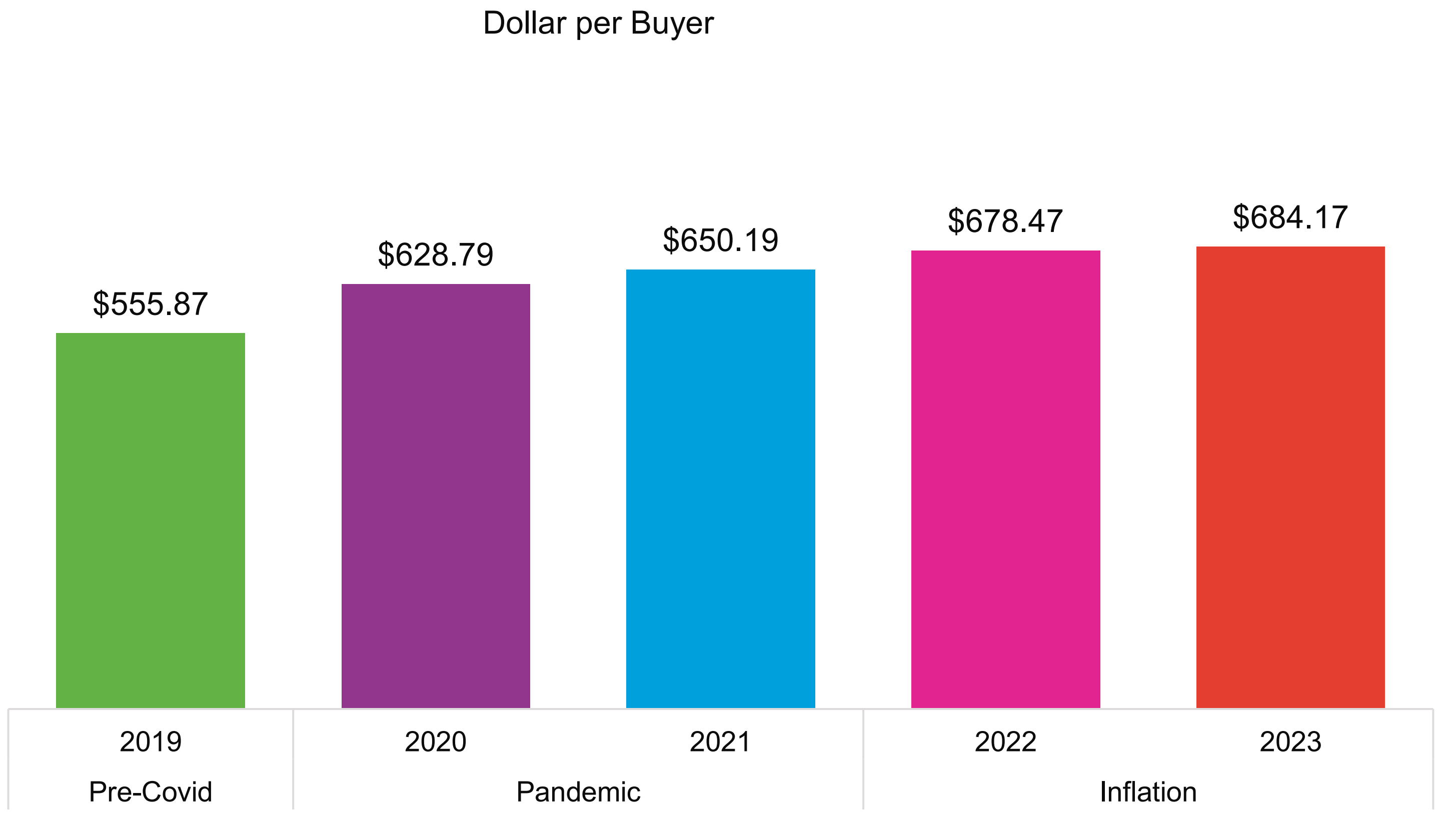
Diving Deep Into Produce

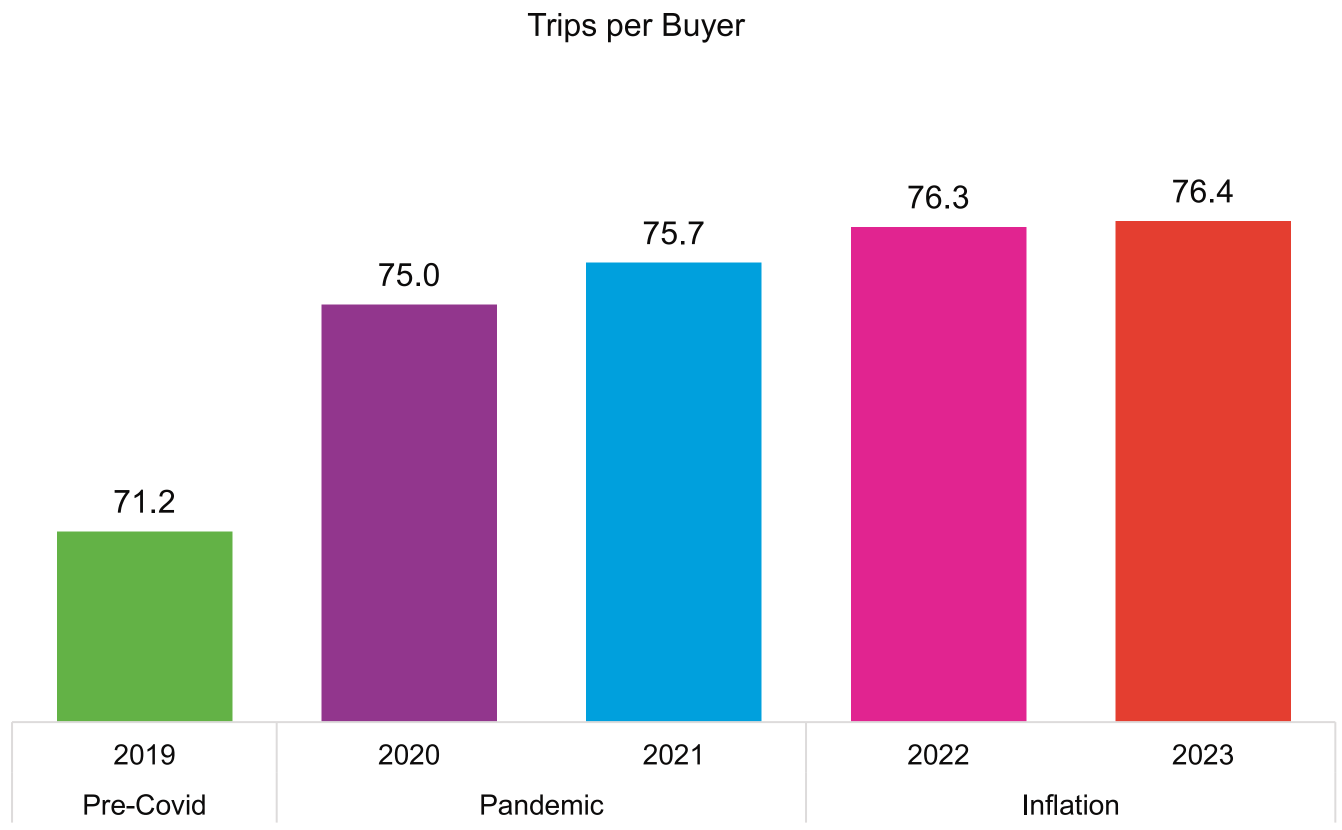
Produce Shopping Behavior Staying Strong





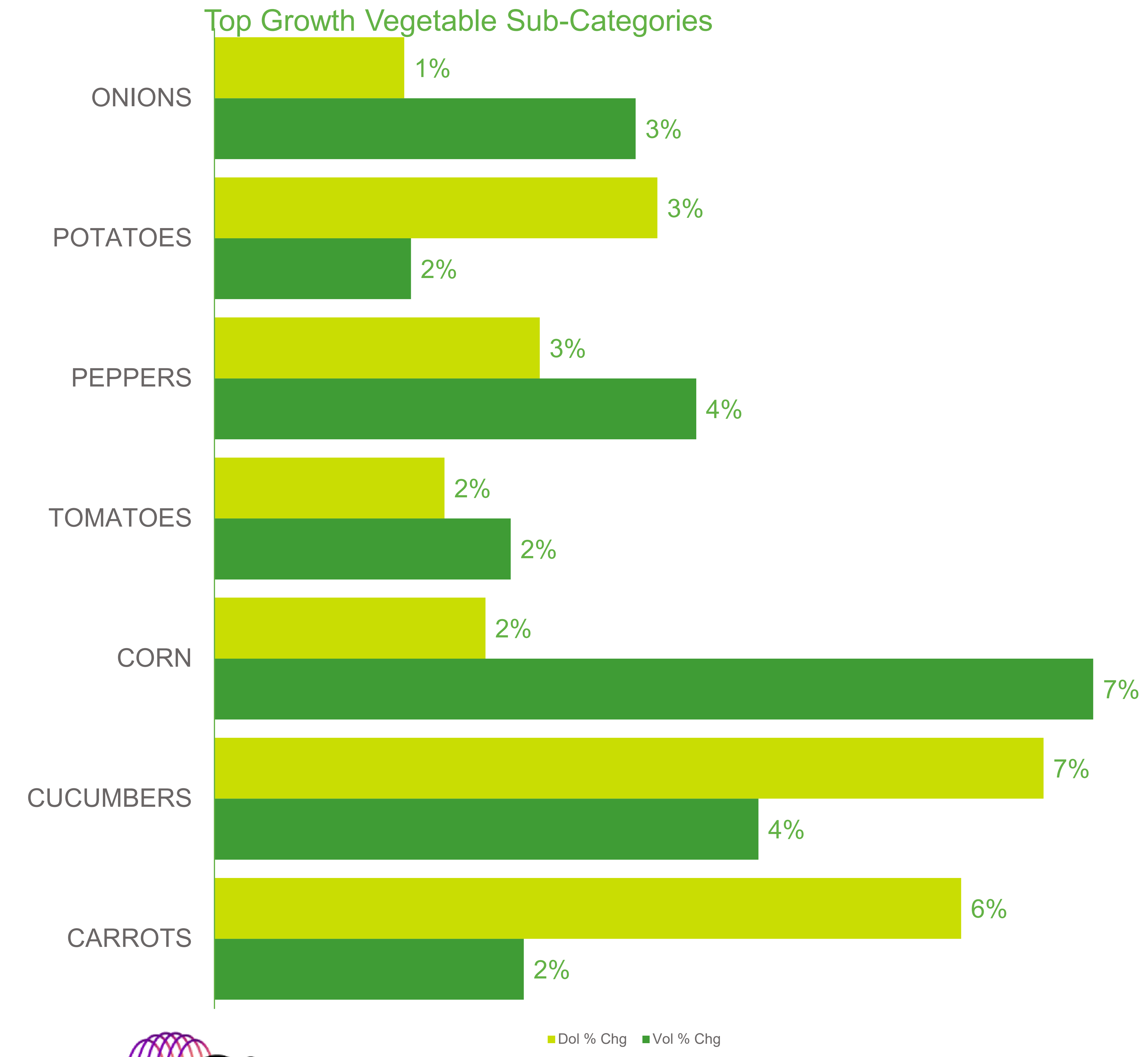


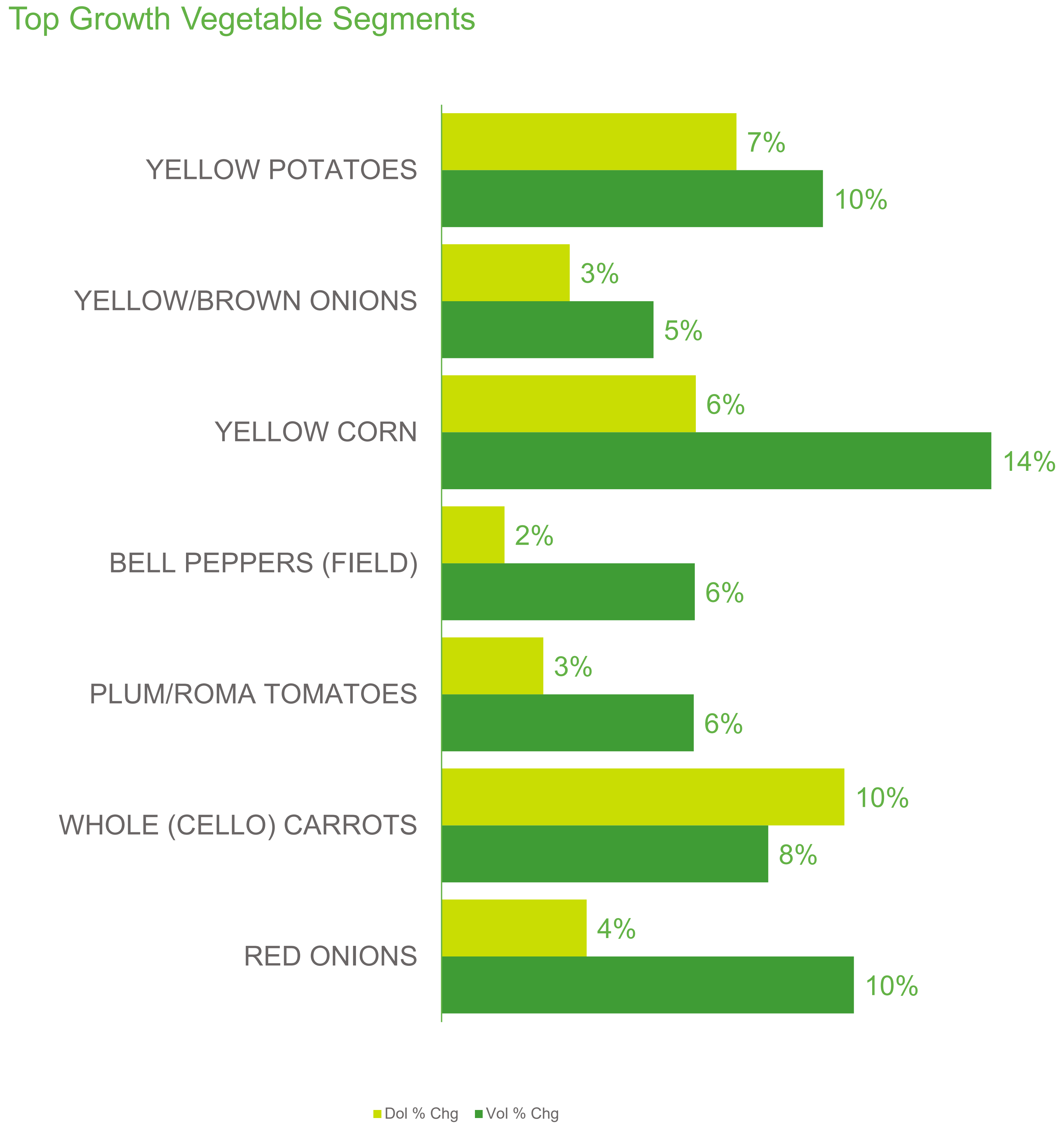




Source: Circana Integrated Fresh, US MULO, 52 WE 12/31/23

Latest VEG Performance: Many Cooking Vegetables and Snacking Vegetables experienced volume growth





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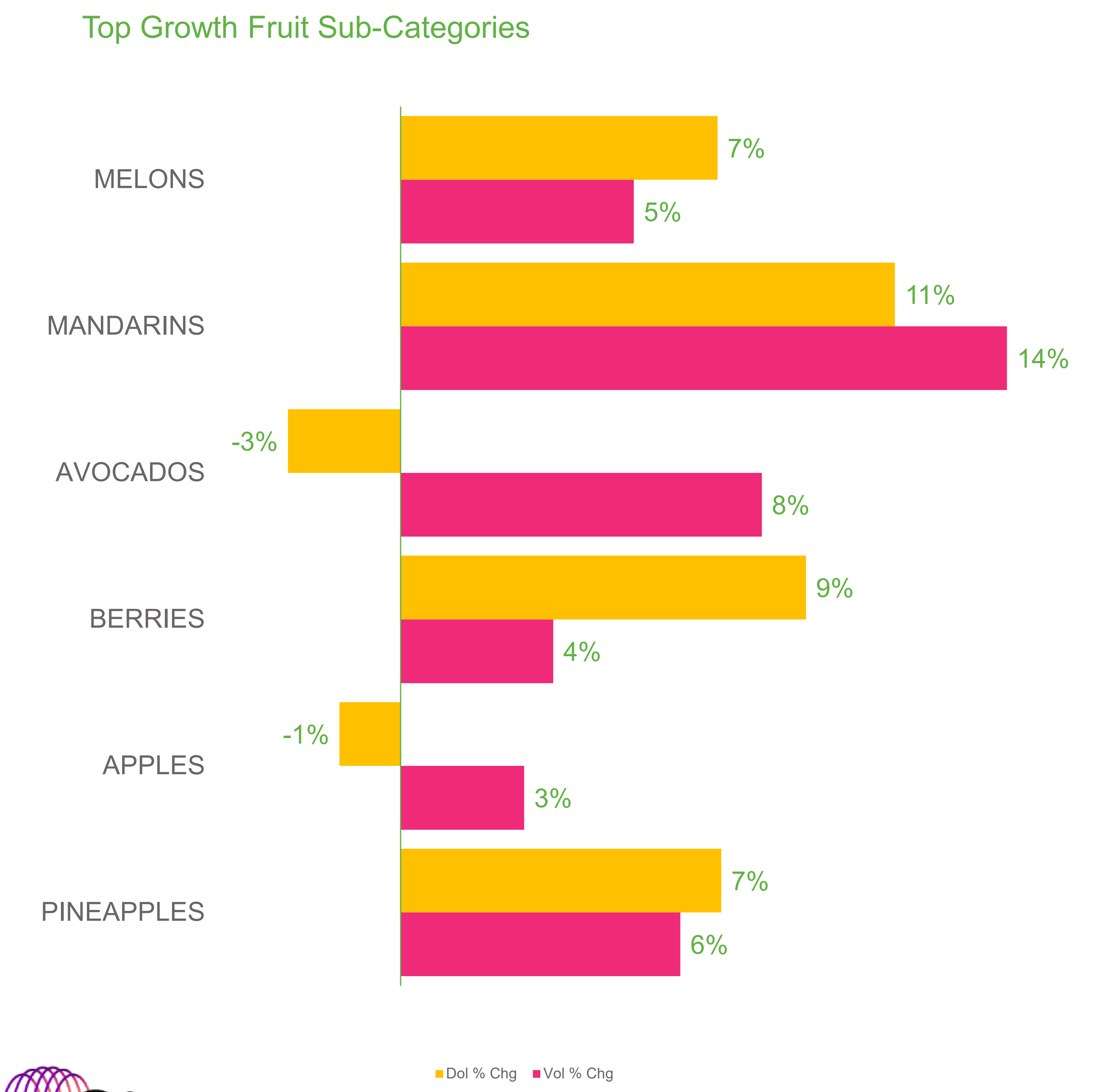
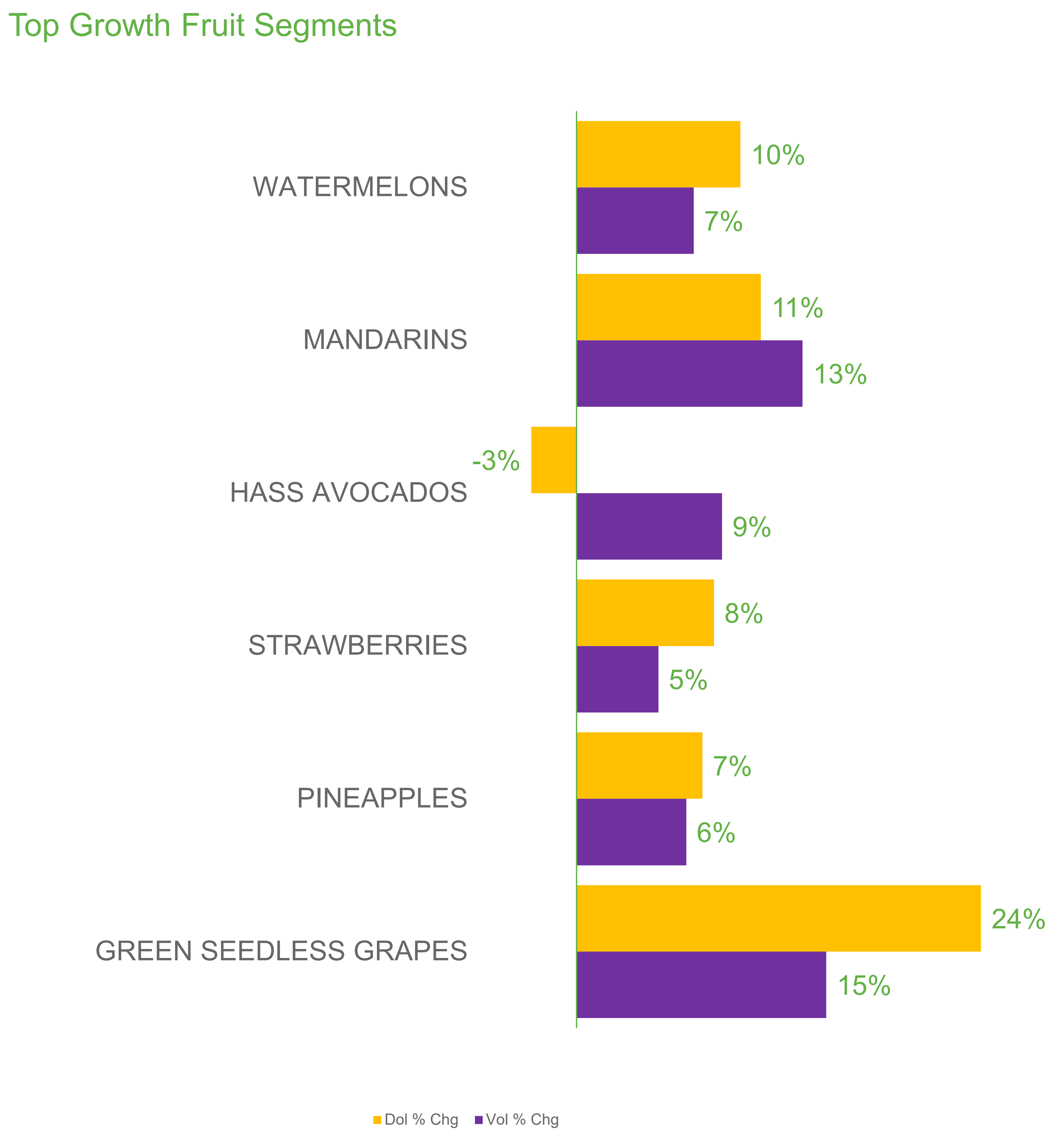
Source: Circana Integrated Fresh, Total US MULO+, Latest 52 Weeks Ending 3/24/2024



Latest FRUIT Performance: Fruit volume is growing this year, driven by tropical fruits and staples like Avocados, Berries and Apples



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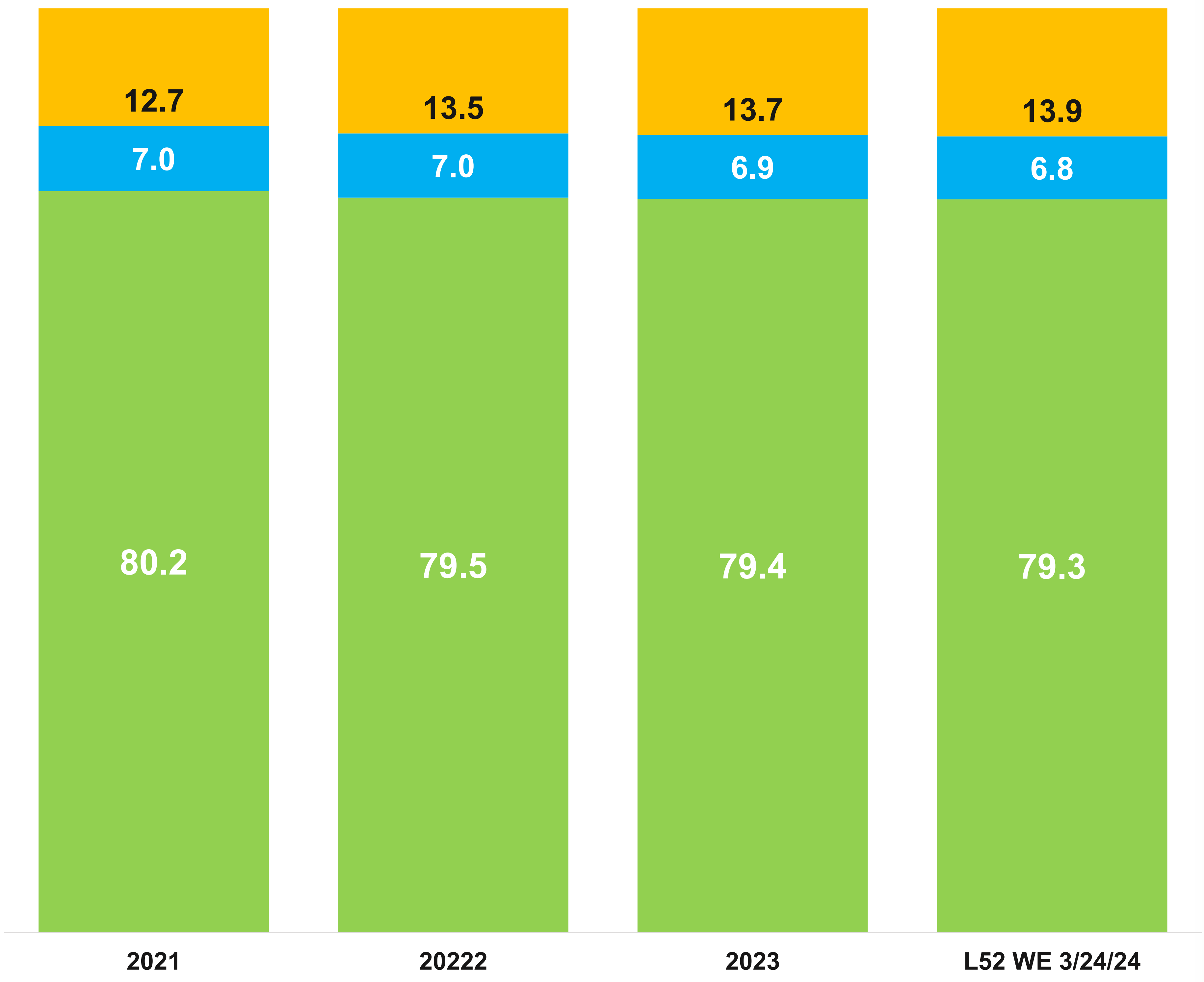
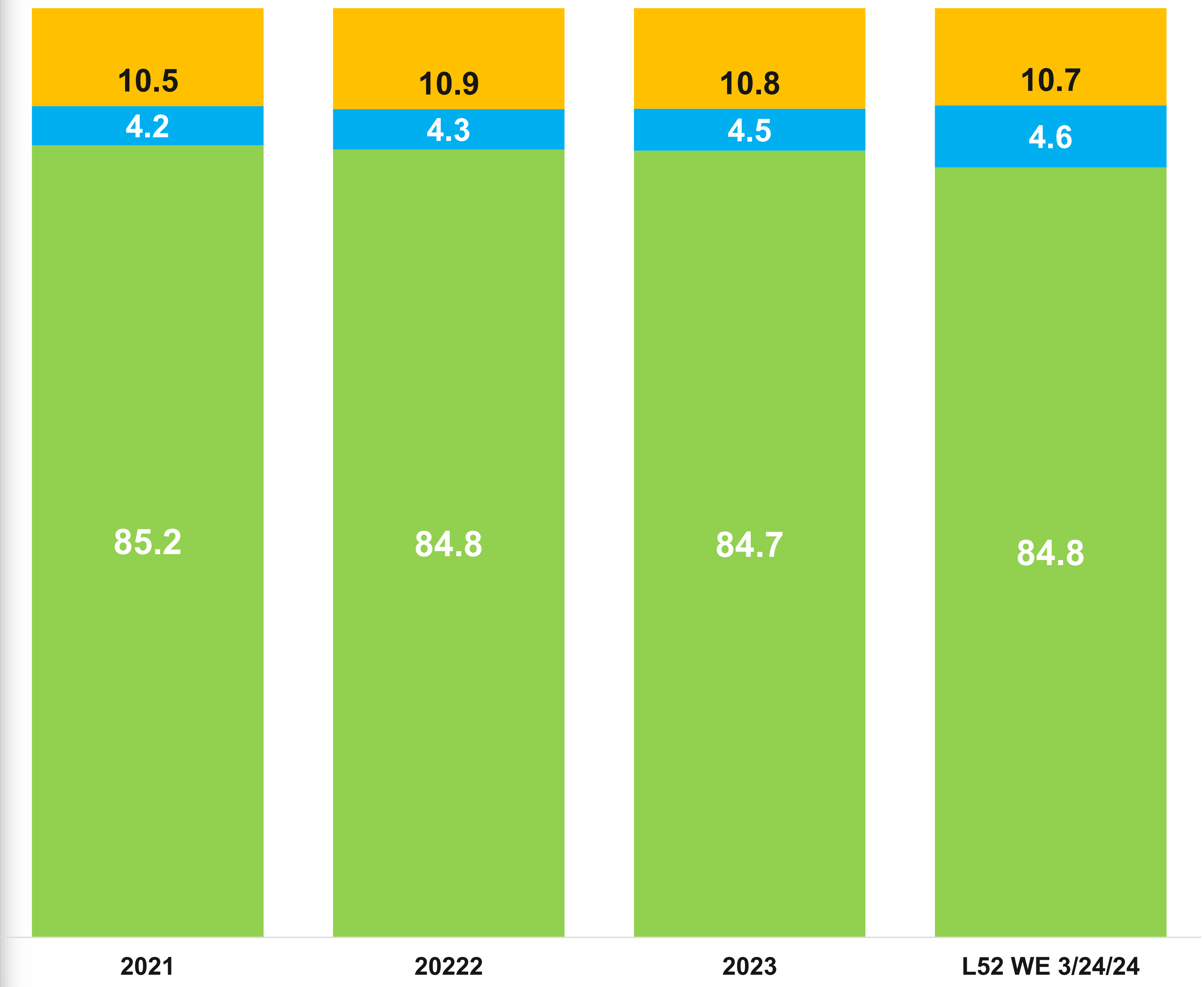
Source: Circana Integrated Fresh, Total US MULO+, Latest 52 Weeks Ending 3/24/2024

TEMP STATE: Fresh remains the dominant selling form of fruit and vegetables; however, there has been slight gains in shelf stable for vegetables and frozen in fruit

VEGETABLES



FRUIT



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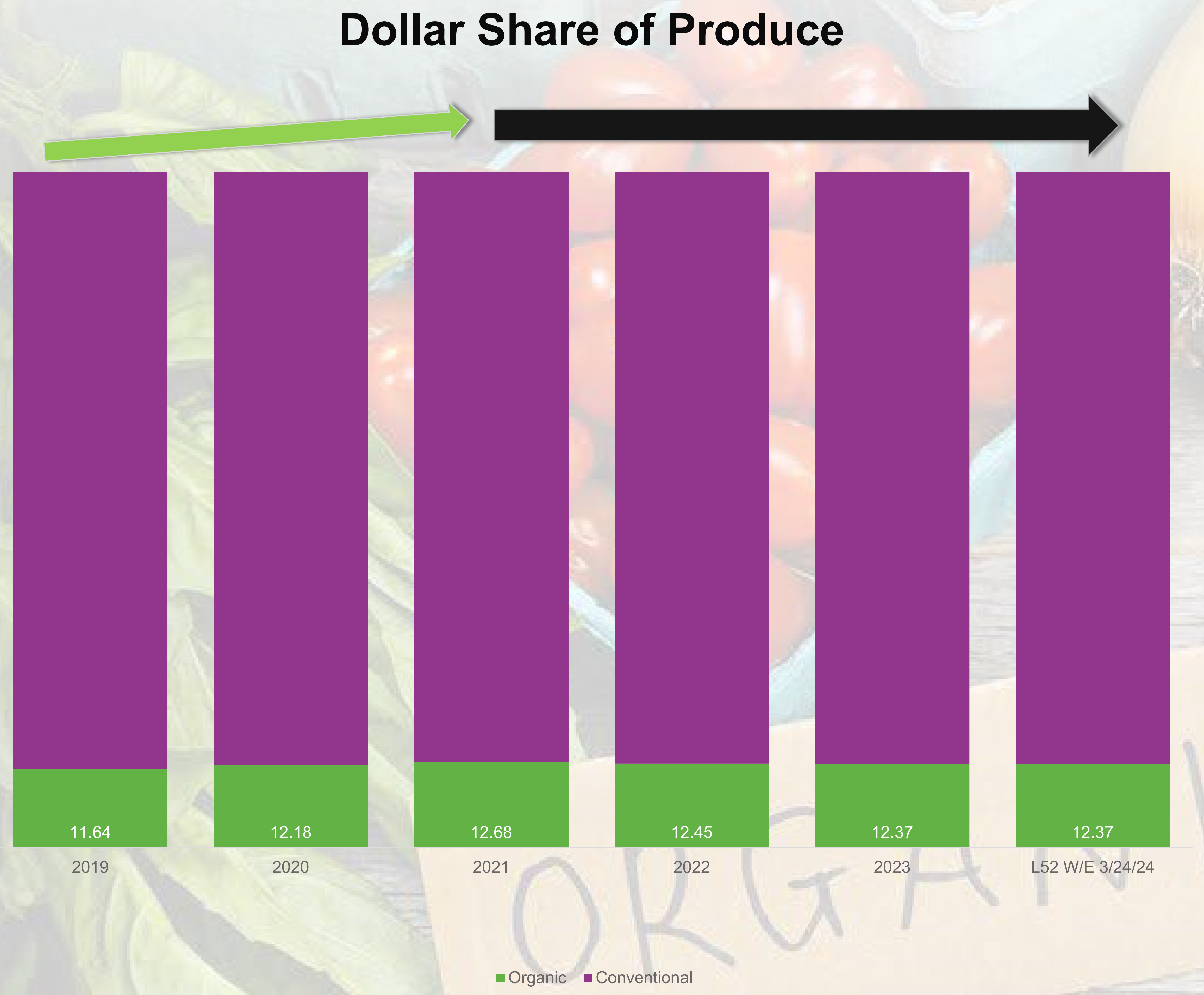
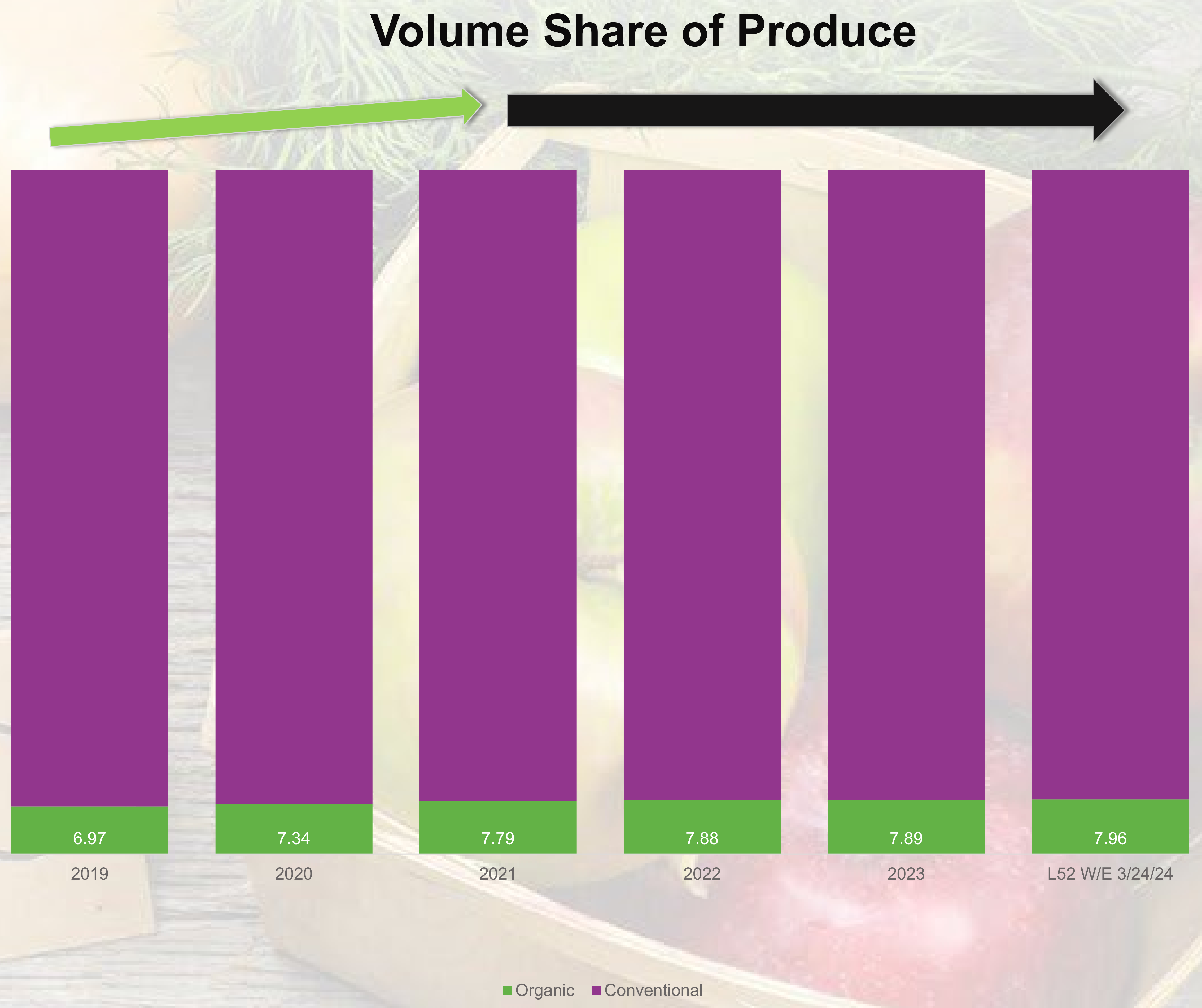
Source: Circana Integrated Fresh Market Advantage, MULO+, Latest 52 W/E 3/24/2024

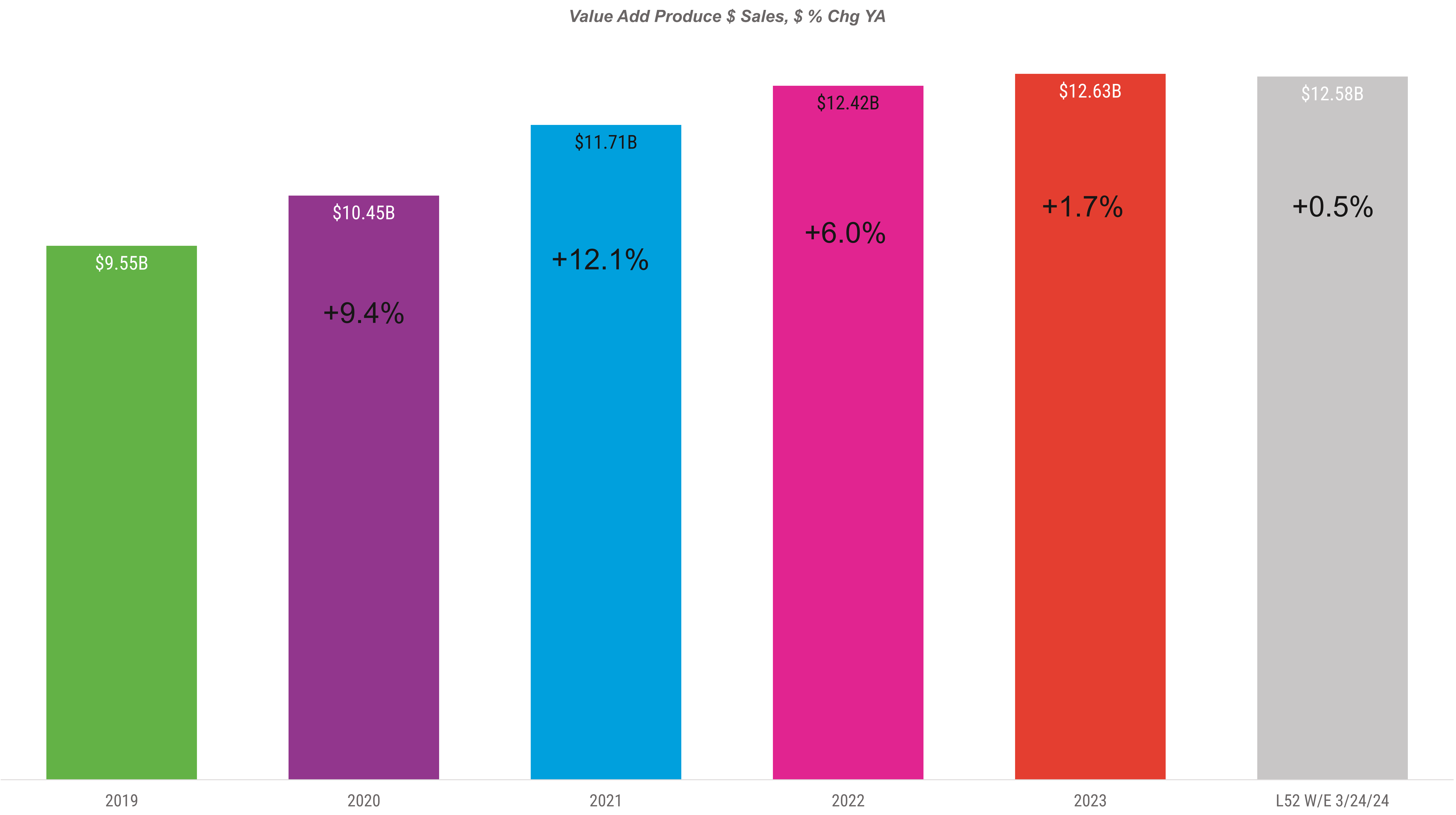
Despite inflation and economic headwinds, ORGANIC produce is maintaining its volume share in the most recent 52 weeks





Source: Circana Integrated Fresh Market Advantage, MULO+, Latest 52 W/E 3/24/2024

VALUE-ADD Produce Continues to Grow, but at a Slower Rate than Previously- Convenience + Relevance + Minimize Waste Key Messages



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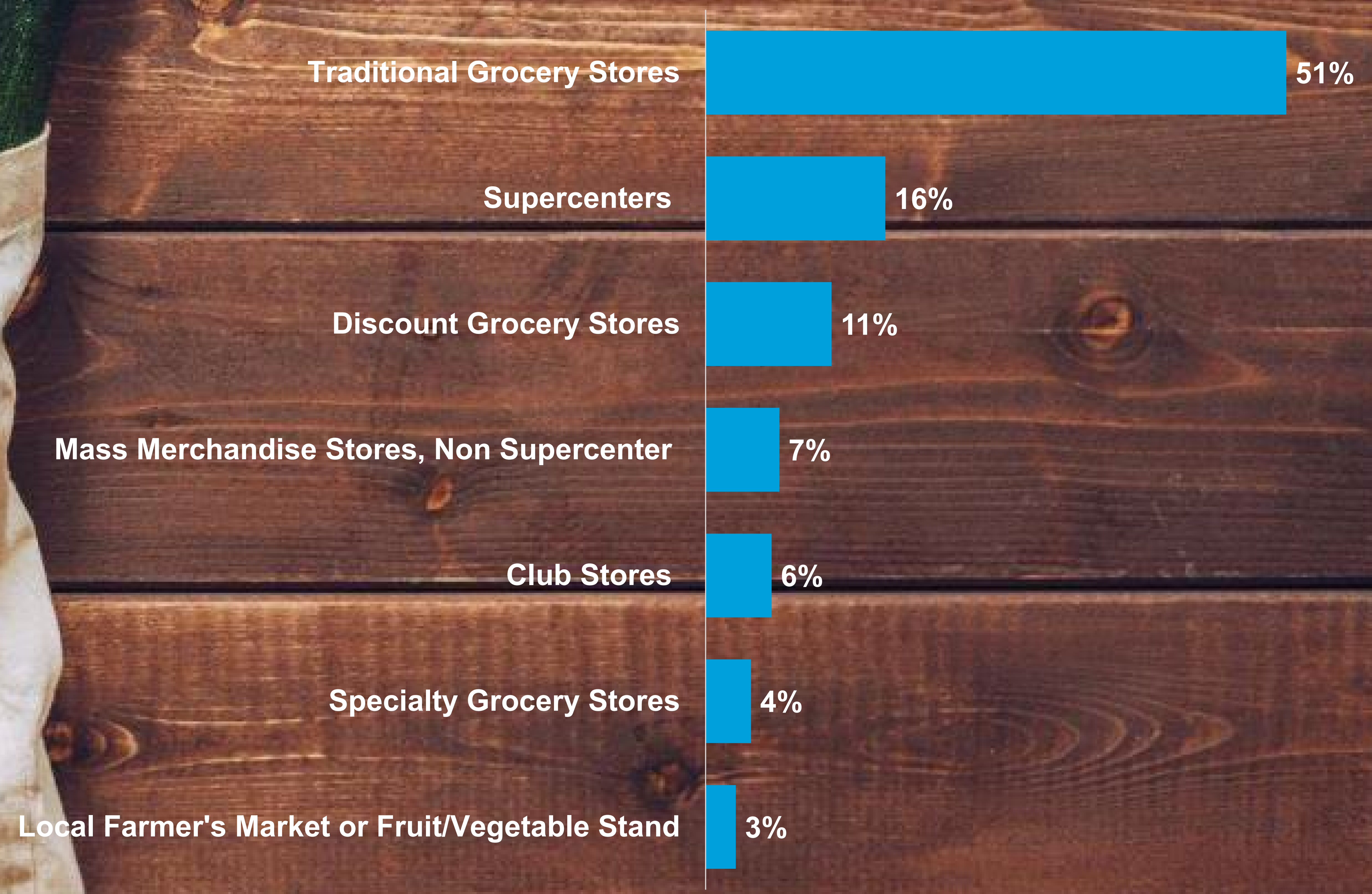
Source: Circana Integrated Fresh Market Advantage, MULO+, Latest 52 W/E 3/24/2024

WHERE: Nearly HALF of all shoppers choose a channel <u>other than</u> Grocery for their primary produce purchases

Channel Shopped <u>Most Often</u> for Produce



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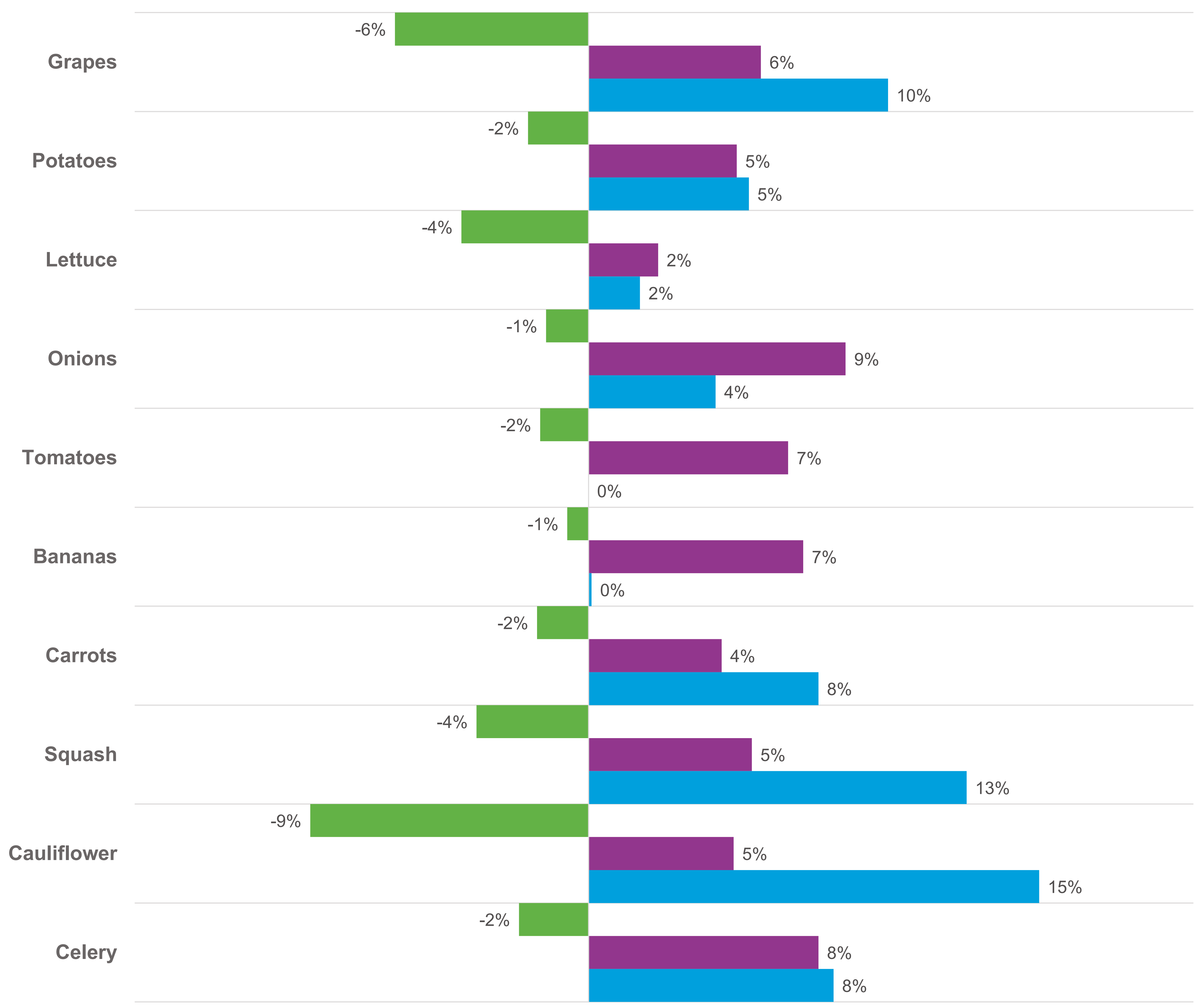
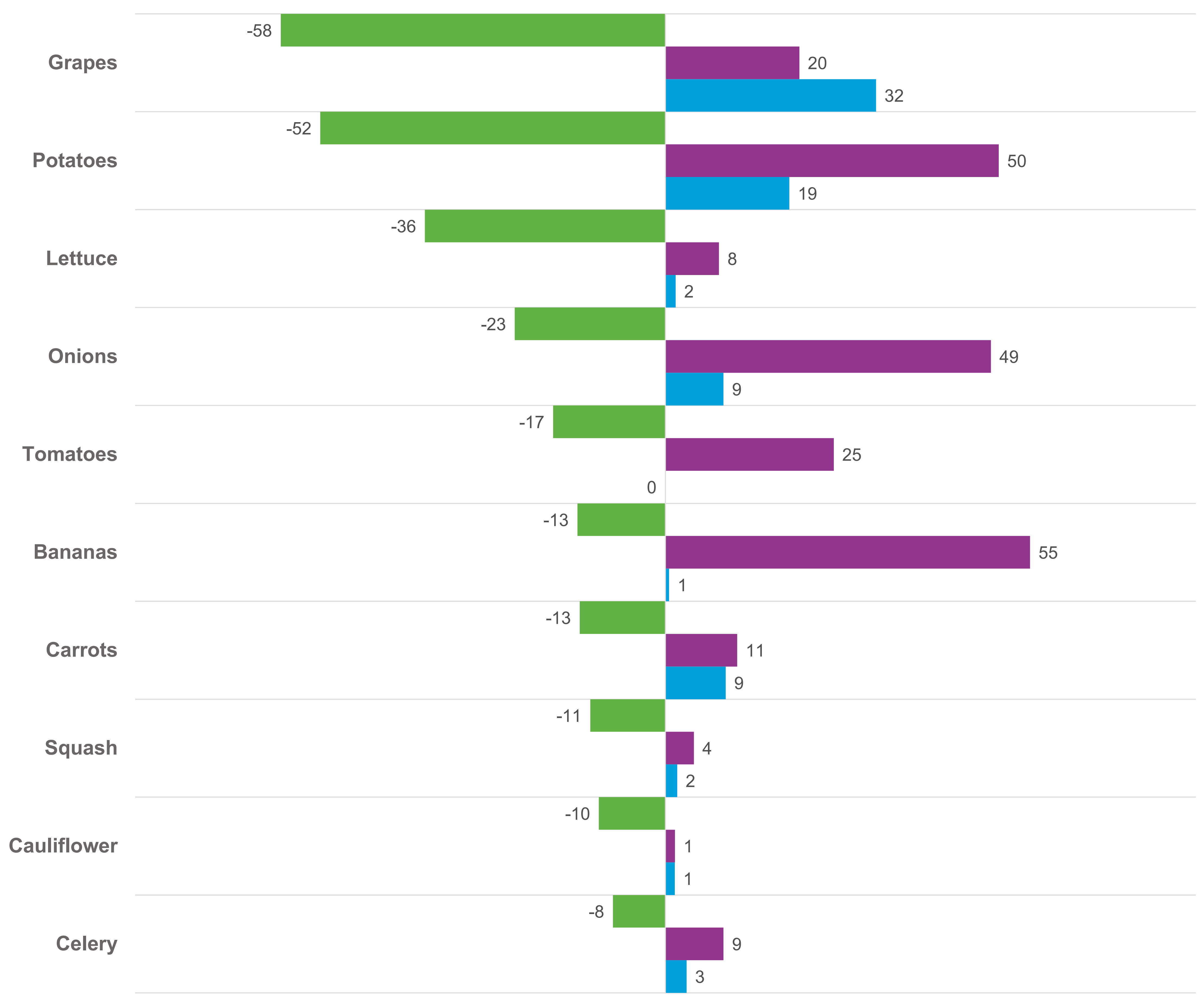
SOURCE: IRI Primary Shopper Survey for IFPA 2022
Results available through IFPA for the top 10 fruit and veg categories
Results able to be used to understand specific commodity behavior as well

Top Produce volume Shifting from Food to Mass and Club

Volume % Change



Volume Change in Millions



Food Mass Club

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Source: IRI Integrated Fresh Market Advantage, Total US Food, Mass and Club, Latest 52 weeks Ending 3/24/2024

Across All Retail Channels, The Future Is Only Semi-Bright for Produce

- Leveraged Circana **Demand Forecasting Platform** to develop causal based econometric demand model for each F&B department
- Leveraged **100+ variables** to test hypotheses for each model developed
- **Machine learning algorithm and over 500 Random Forest models** to determine most important causal variables
- Models finalized **based on best fit, significance levels and intuitiveness**
- Developed **forward looking input variable assumptions** using historical trends and industry experts
- Platform allows us to run scenarios and **estimate future sales and decomposition of its drivers**

Circana retail Produce Outlook for 2024

On-par with Food & Bev – but behind Deli and Beverages:

2 - 3%	Dollar Growth
1 - 2%	Price per Vol Growth
0 - 1%	Volume/Unit Growth

If we do what we've always done…

We will get to where we've always been.

Pockets of potential:

How do we get different groups more engaged with fresh?

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There is a changing of the consumer guard

Future consumers may look different than today. How can we shift to accommodate their needs without alienating the base?

Key Change Forces

South & Western Population Migration

Hispanic Population Growth

Younger Generation Growing Spend Power

Source: https://www.cbsnews.com/news/us-population-expected-to-top-335-million-by-new-years-day-2024/

https://www.census.gov/newsroom/press-releases/2023/population-trends-return-to-pre-pandemic-norms.html#:~:text=The%20nation%20gained%20more%20than,the%20start%20of%20the%20pandemic.

https://www.brookings.edu/articles/immigration-is-driving-the-nations-modest-post-pandemic-population-growth-new-census-data-shows/, https://www2.claritas.com/2023-Hispanic-Market-Report

Produce currently caters to its highest spending shoppers

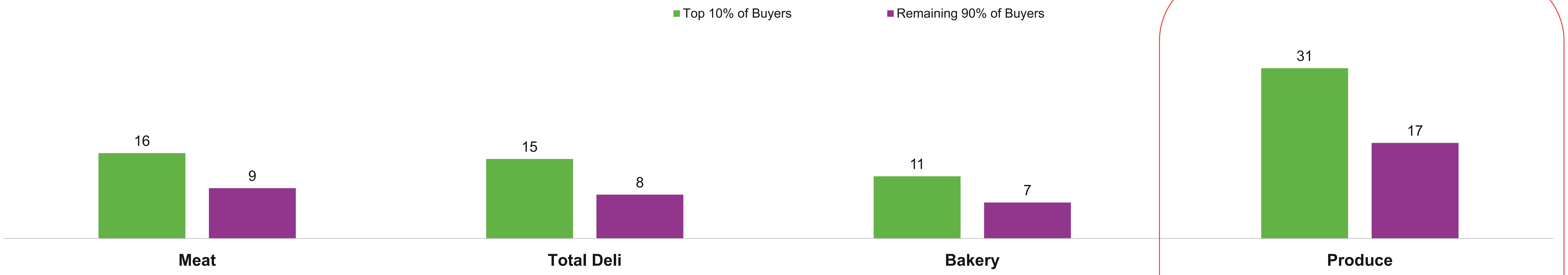
Top **10%** of shoppers who drive **4.4x** more sales than the remaining 90% of US households

but **EVERYONE** could buy more

Source: Circana OmniConsumer Integrated Fresh Scan Panel, Total US All Outlets, 52 weeks ending 04-21-2024

Top 10% of shoppers explore the department depths, purchasing a broader assortment

Avg. Number of Categories Shopped Annually






Source: Circana OmniConsumer Integrated Fresh Scan Panel, Total US All Outlets, 52 weeks ending 04-21-2024

Who is in the Top Spending Produce HHs?

Top indexing demographics purchasing Produce

Generation	Income	Household Makeup
Boomers (Born 1946-1964)	**High Income per Capita**	**0 or 1 Child**
109 Dollar Index	**126 Dollar Index**	**109 Dollar Index**
35% of Dollars	39% of Dollars	33% of Dollars
33% of Buyers	32% of Buyers	30% of Buyers

Other Households Still Buy Produce – Millions of Dollars at Stake in Increasing their Spend

Source: Circana Integrated Fresh Panel, Total US – All Outlets, 52 weeks ending 3/24/2024

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Going (and Growing) Beyond Produce’s Base

Meet the Healthy Chic

Conscious Consumers Focused on Wellness

SEGMENT SIZE: 16%

What they say….

I am committed to **feeling as good** as I possibly can and I know that diet and exercise are my keys to making that happen.
I am always trying to do new things to improve my eating, and I **actively seek out information about health-related topics**.
In a word, I'm very proactive about my eating and exercise—and I try to set a good example for my family—especially my kids.

	THESE ARE MY TOP 3 SELECTION CRITERIA FOR…		
	Snacks	Meals	Beverages
1	Addresses wellness/ethical goals	Fresh, not processed	Low calorie/sugar/ sodium/fat
2	Low calorie/ sugar/sodium	Addresses wellness/ethical goals	Addresses wellness/ethical goals
3	High in protein	Has fruit/vegetable servings	Natural/organic+ provides add'l benefits

THESE ARE MY EATING HABITS AND ATTITUDES

- Actively trying to improve eating habits (82%). Follow a healthy and balanced diet (72%) and actively seek information on nutrition/healthy eating (72%)
- Prefer food that is 'Fresh' than 'processed' (88%) and tries to minimize processed food intake (78%)
- Look for food/beverages that offer nutritional benefits (69%) and try to get plenty of fiber from their diet (77%)

Source: : Circana Integrated Fresh, Naturlink Segmentation

Healthy Chic Consumers & Produce

- **22%** of Produce sales, despite only being 16% of the population
- **2-5** People in the home (adults, kids & even more likely to have pets)
- **1.5** times more likely to research a company's social & eco policies
- **1.4** times more likely to cite friend's opinions on stores and foods
- **2%** Increase in Produce spending vs. 2022, while other consumers +4%

Source: Circana Integrated Fresh, Naturlink Segmentation Calendar Year 2023

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What are Gen Z buying in Produce?

Top growing Dollar % Change

Source: Circana Integrated Fresh Panel, Total US – All Outlets, 52 weeks ending 3/24/2024

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Opportunity: WIC Eligible Households

- Low-Income per Capita
- Age of Children 0 to 5
- Head of Household 35-44 years old
- Millennials-Older (Born 1981-1989)
- 4+ Person HH
- White & Hispanic
- No Pets

The average monthly WIC-eligible population is **12 million** US households

Source: Circana Integrated Fresh Panel, Total US – All Outlets, 52 weeks ending 3/24/2024,

Lowest Income per Capita (bottom third of HHs) and have children under age 5 in the home

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** Source: USDA Food and Nutrition Service*

A DEEPER DIVE:
CONSUMER PROFILES

WIC Program

Population Served

- Lower Income Pregnant and Postpartum Women

- Children age 0-5

OPPORTUNITY:

- 53% of infants in USA are WIC eligible
- 50% participate after age 1
- Increasing enrollment

CONSIDERATIONS:

1. **Fruit and Vegetable Benefit**: Quadrupled over last three years. Participants receive $25-$52/month per person.

2. **Subpopulations**: Of those eligible, Hispanic population has highest rate of participation and highest rate of fruit and vegetable benefit redemption

3. **Fresh Dominates**: WIC shoppers overwhelming choose fresh option when given choice

4. **In-Store Only:** WIC not yet redeemable online. Get ahead!

5. **High Stocking Standards**: Non-traditional grocery have hard time accepting WIC

6. **Local WIC Agencies and Retailers:** build partnerships and promote free fruit and veggies

7. **Billions in Produce Redeemed**: Approximately $2.3B in WIC produce sales last year (with only half of those eligible participating)

CHARACTERISTICS

- Over index on food purchase, fruit & veggies purchases, and access to retail outlets.

How can we evaluate fruit and vegetable sales in a new way?

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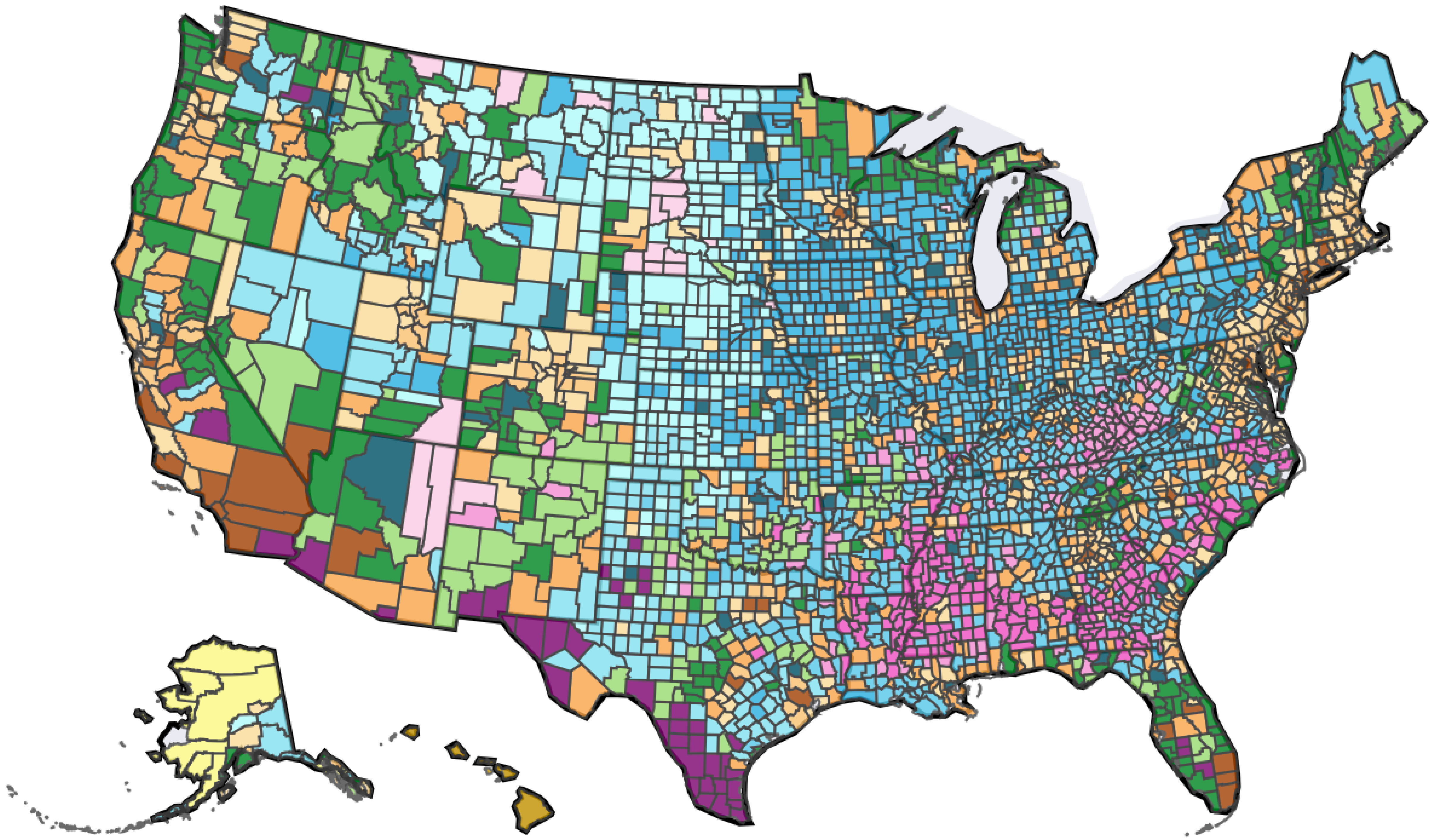
The Community Explorer



Milken Communities

Urban America

74% of the US population

819 urban metro counties.

1-Urban Core = Prosperous, ethnically and linguistically diverse large metro areas with substantial disparities between their highly educated (largely White) and less educated (largely Black or African American) residents (26 percent of the population)

2-Lower-Middle Class = Less populous suburban and small metro counties that are not as economically prosperous as the rest of Urban America (18 percent of the population)

3-Affluent Suburbs = Affluent and more populous (but less diverse) suburban and small metro counties that jointly represent the profile with the highest median income (16 percent of the population)

4-Middle Class = Middle-class communities with a largely White population that resides in large- to medium-sized suburban and small metro counties (14 percent of the population)

Industry-Driven America

17% of the US population

1,507 counties where employment is concentrated in one industry.

5-College Towns = College towns with a relatively young, highly educated, and highly geographically mobile population (5.4 percent of the population)

6-Manufacturing Midwest = Counties primarily located in the Midwest that form the profile with the highest proportion of White population working in the manufacturing sector (5.2 percent of the population)

7-Low-Wage Manufacturing = Low-wage workers in the manufacturing and chemical industries located largely in the South and Northeast regions of the country, with an above-average proportion of the population living below the poverty line (4.9 percent of the population)

11-Hispanic Agriculture =Highly agricultural communities with a higher than average concentration of Hispanic or Latino population residing mostly in the West and South (1.2 percent of the population)

15-The Great Plains = Agricultural counties located in the Great Plains with a high proportion of the White population (0.3 percent of the population)

Milken Communities

Extremely Vulnerable America

3.5% of the US population

378 counties that represent the profile with the lowest levels of income.

9-Hispanic Southern Border = Counties mostly located along the US southern border with a majority of a relatively young Hispanic or Latino population living in extreme poverty (1.4 percent of the population)

10-Black South = Southern counties with the highest proportion of Black or African American population and lowest median household income of all profiles (1.3 percent of the population)

12-White Appalachia = White communities in Appalachia with the third-highest level of unemployment rates and second-lowest household income of all profiles (0.7 percent of the US population)

16-American Indian Reservations = American Indian Reservation communities living in extreme poverty with more than one-third of the population with income below the poverty line (0.1 percent of the population)

Graying America

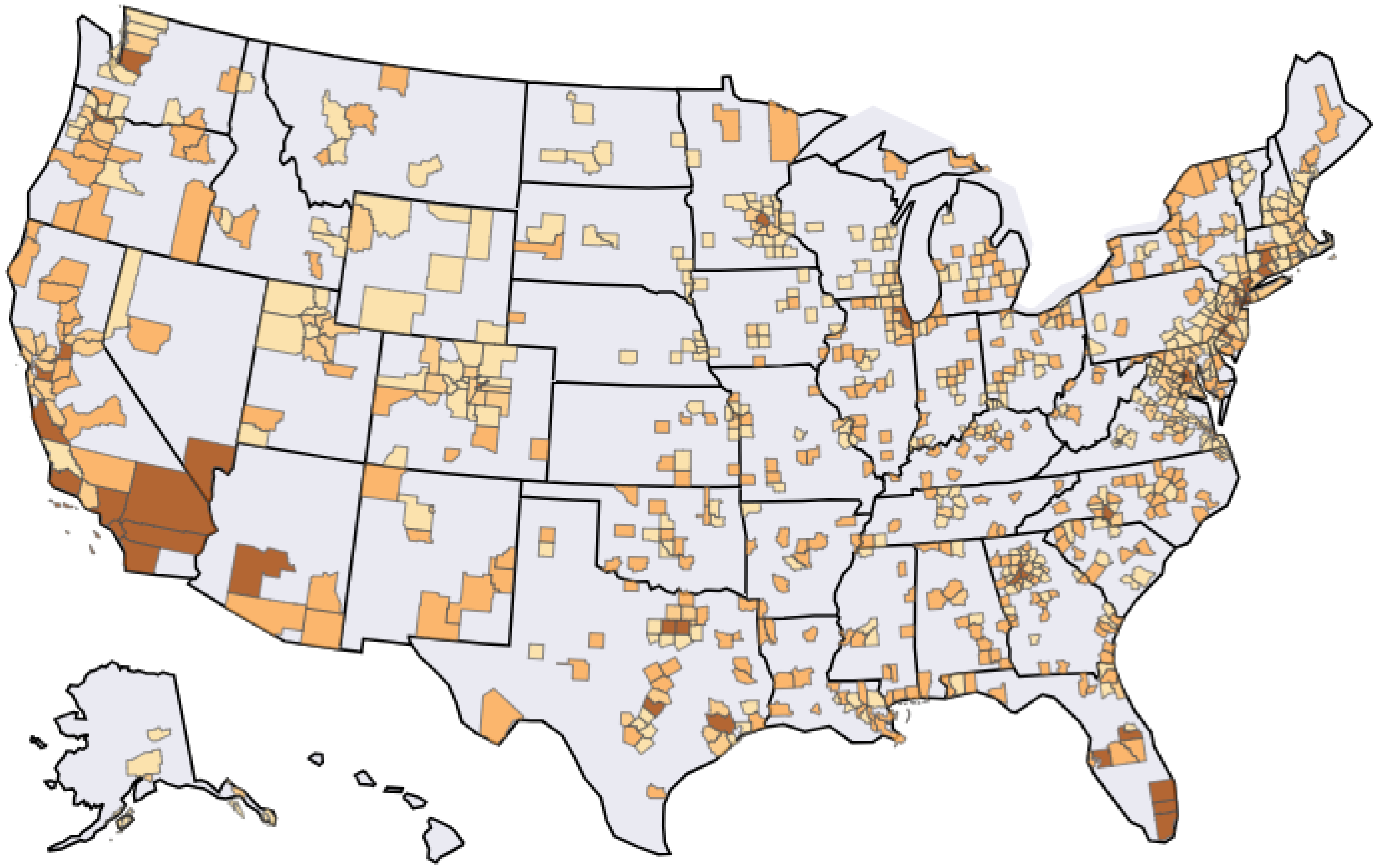
5.1%of the US population

424 counties that represent the highest concentration of population age 65 years or older.

8-Retiree Communities = Retiree communities with adequate household incomes and access to economic resources (4.5 percent of the population)

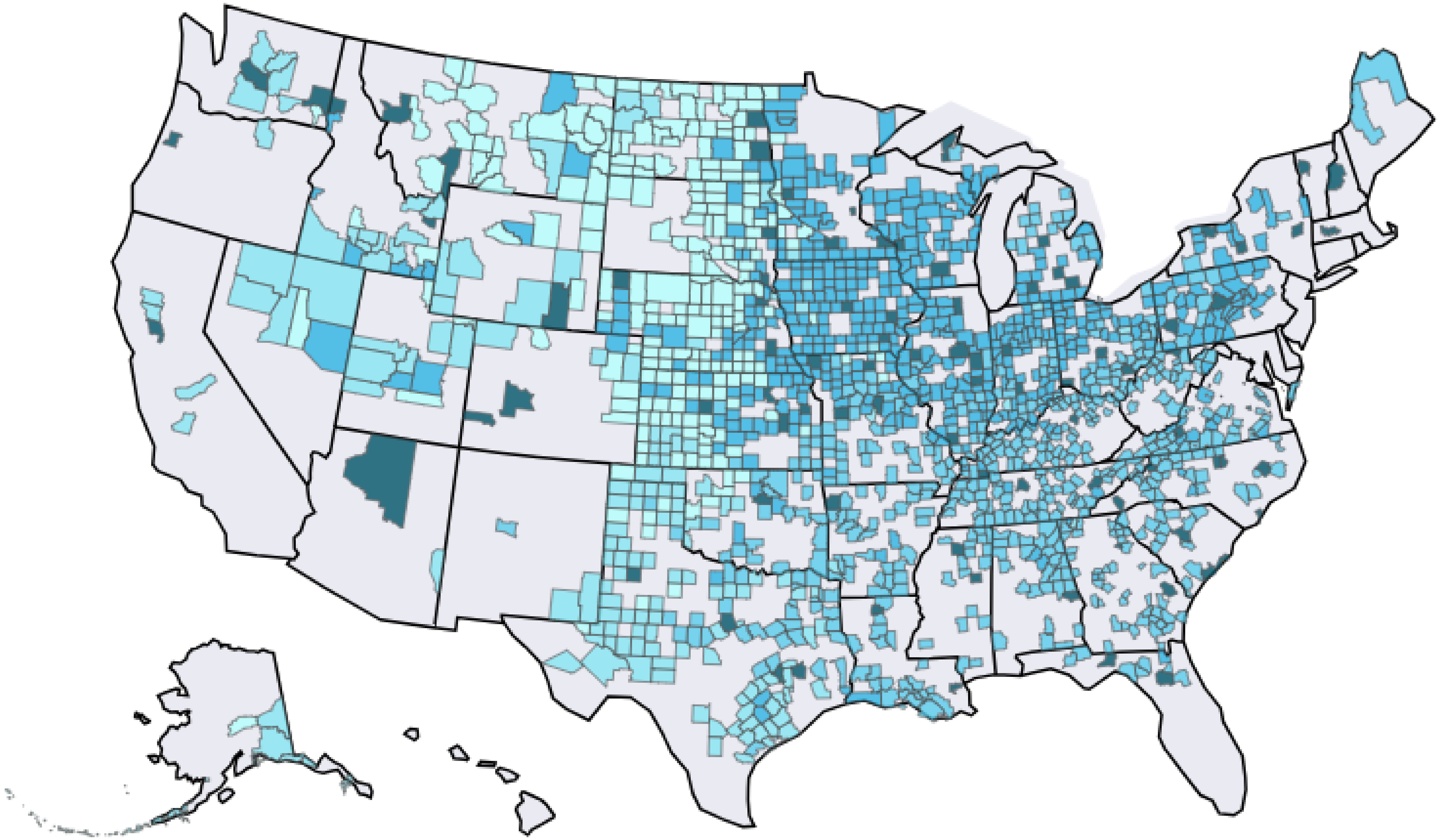
13-Isolated Seniors = Isolated seniors with high disability rates and relatively low incomes (0.6 percent of the population)

Urban America



Urban America
74% of the US population
819 urban metro counties.

Industry Driven America



Industry-Driven America

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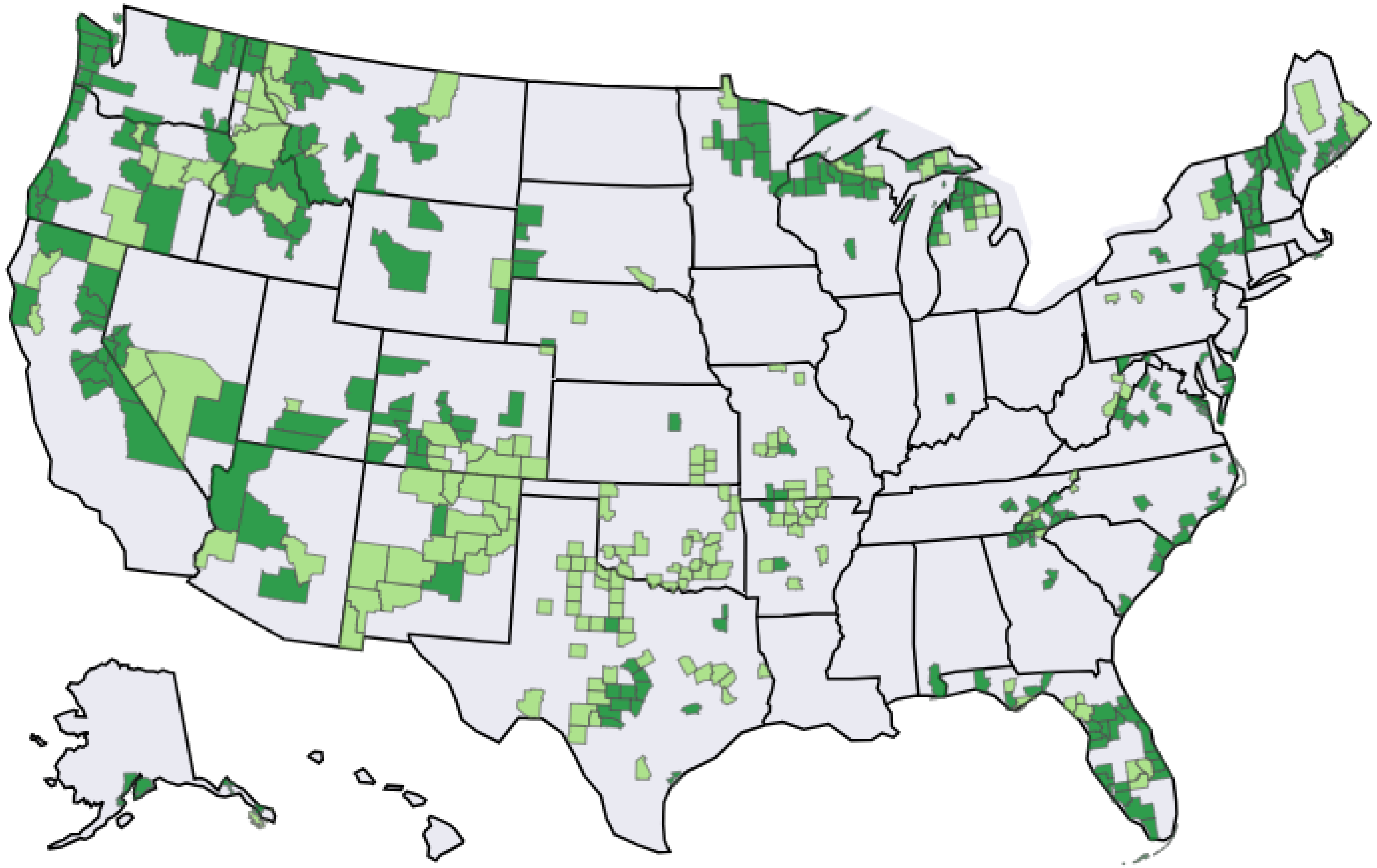

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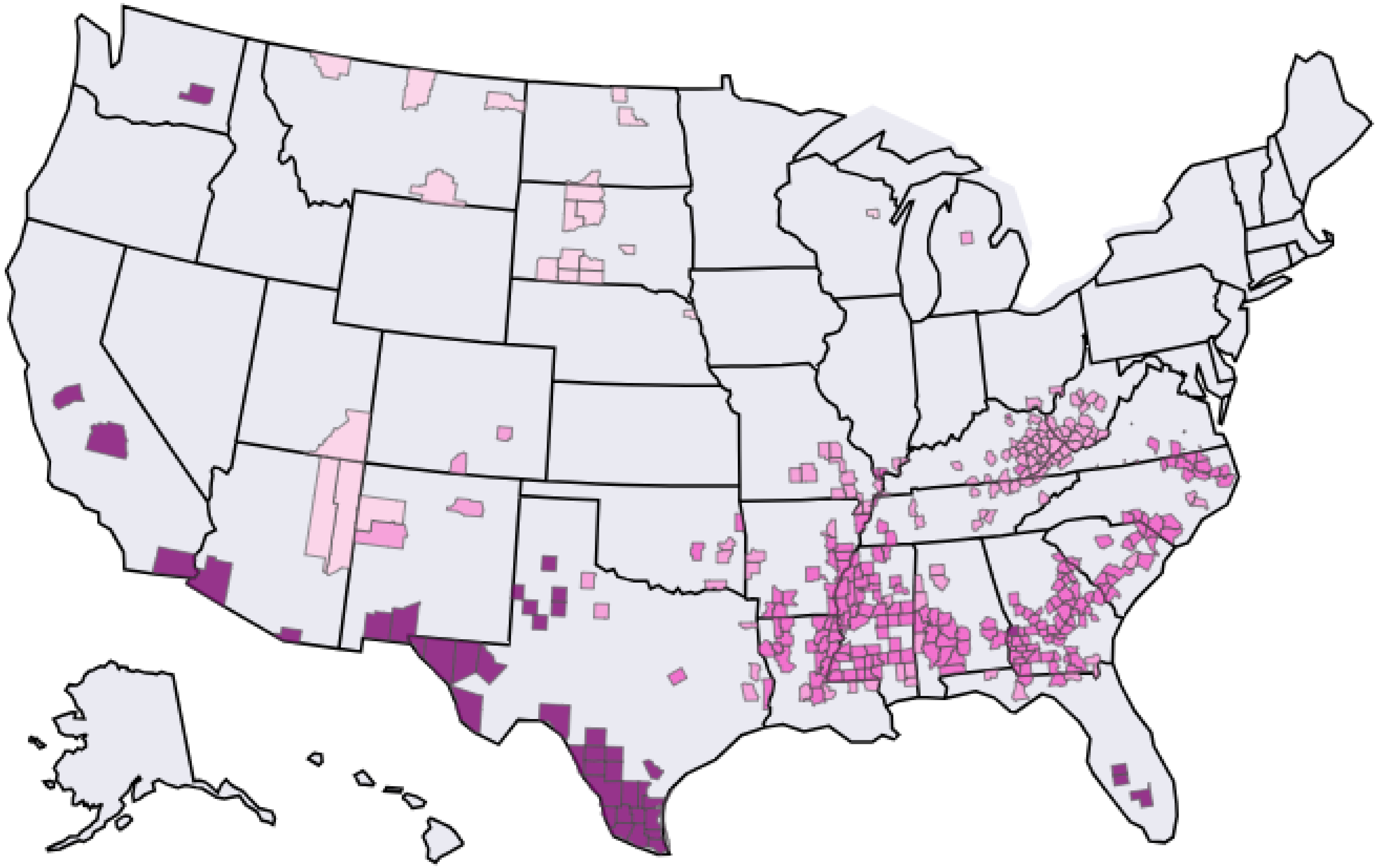
Retiree Communities

Isolated Seniors

Extremely Vulnerable America



Extremely Vulnerable America

3.5% of the US population

378 counties that represent the profile with the lowest levels of income.

Hispanic Southern Border
Black South
White Appalachia
American Indian Reservations

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Circana.

	% of Population	Income Level	% of Stores (Access)	% of Food $ (Food Spend)	% Veggie $ (fair share of food $)	% Fruit $	Change Veggie Vol 22-23	Change Fruit Vol 22-23	Cost per lb.
Urban Core	25%	High	18%	21%	23%	25%	.14%	.86%	$2.01V $1.75F
Affluent Suburbs	18%	High	12%	17%	19%	20%	-74%	.73%	$2.15V $1.81F
Middle Class	13%	High	15%	16%	16%	16%	44%	1.55%	$2.00V $1.70F
Hispanic Ag	1.2%	Mid	1%	1.09%	.97%	.97%	2.01%	2.96%	$1.62V $1.48F
Retirees	4%	Mid	6%	6%	7%	6%	2.09%	2.63%	$2.07V 1.80F
Manufacturing Midwest	5%	Mid	7%	5%	4%	4%	.93%	2.16%	$1.81V $1.51F
Great Plains	.26%	Mid	.2%	.05%	.03	.03	8.22%	4.30%	$1.80V $1.49F
Lower Middle Class	18%	Mid/Low	22%	20%	19%	18%	.67%	1.93%	$1.86V $1.61F
College Towns	5%	Mid/Low	6%	6%	6%	6%	-72%	.99%	$2.03V $1.71F
Low wage Manu	5%	Mid/low	8%	4%	3%	3%	2.36%	2.96%	$1.66V $1.40F
Hisp Southern Border	1.33%	Mid/Low	1%	1.2%	.91%	1.01%	1.15%	2.65%	$1.53V $1.93F
American Indians	.69%	Mid/Low	.2%	.10%	.09%	.09%	2.44%	-1.026%	$1.42V 1.52F
Black South	1.23%	Mid/Low	1%	1%	.71%	.67%	2.95%	2.96%	$1.61V $1.37V
Isolated Seniors	.63%	Low	1%	.51%	.43%	.37%	2.04%	1.06%	$1.70V $1.52F
White Appalachia	.69%	Low	.69%	.54%	.38%	.35%	.30%	.41%	$1.60V $11.39F

SNAPSHOT of COMMUNITIES with CONSUMPTION DATA

Produce Champions

CHARACTERISTICS

- Produce purchases index higher than food purchases
- Highest spend of produce lbs
- Under index in access to stores

SEGMENTS: Urban Core, Affluent Suburbs

Food Champions

CHARACTERISTICS

- Over index on food purchase, fruit & veggies purchases, and access to retail outlets.

SEGMENTS: Middle Class, Retirees, Lower Middle Class, College Towns

Needing a Nudge

CHARACTERISTICS

- Index food but under index on produce
- Under index on access to stores

SEGMENT: Manufacturing Midwest

Struggling

CHARACTERISTICS

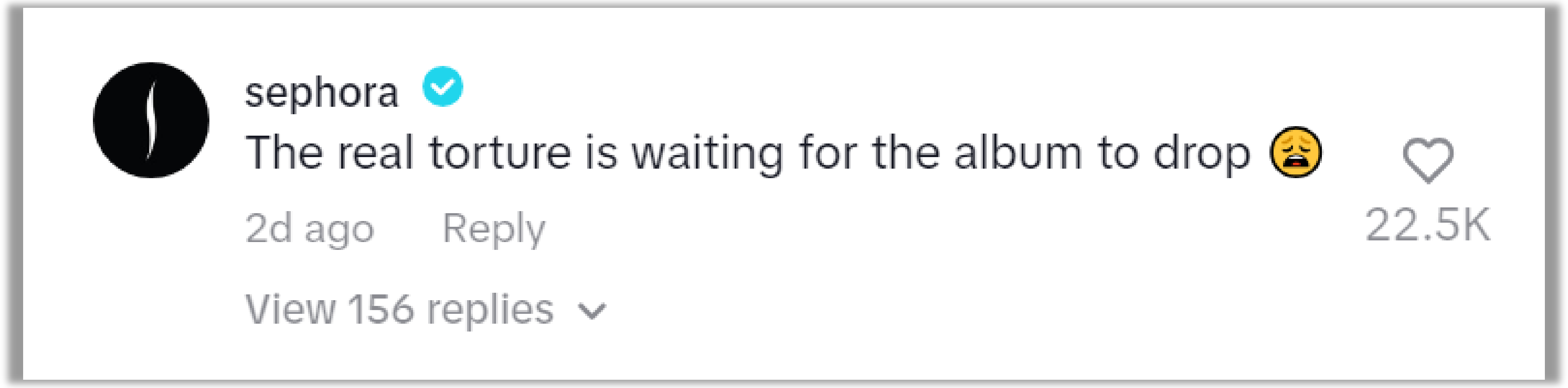
- Under index on purchases of food, veggies, fruits and access to stores

SEGMENTS: Hispanic Agriculture, The Great Plains, Low Wage Manufacturing, Hispanic Southern Border, American Indian Reservations, Black South, Isolated Seniors, White Appalachia

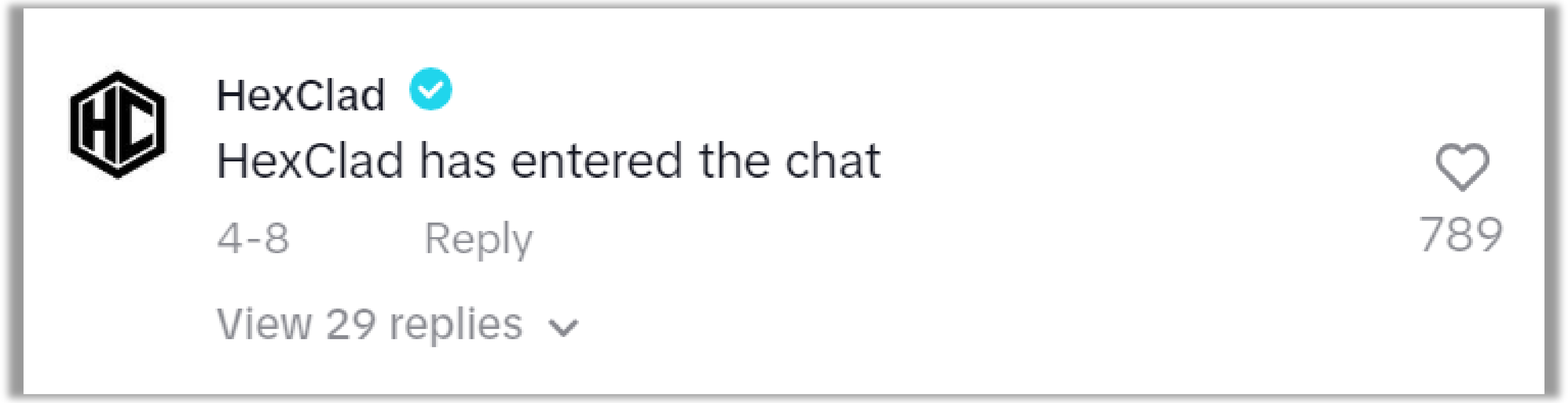
PRACTICAL APPLICATIONS

PRIORITIZING MEANINFUL CONNECTIONS

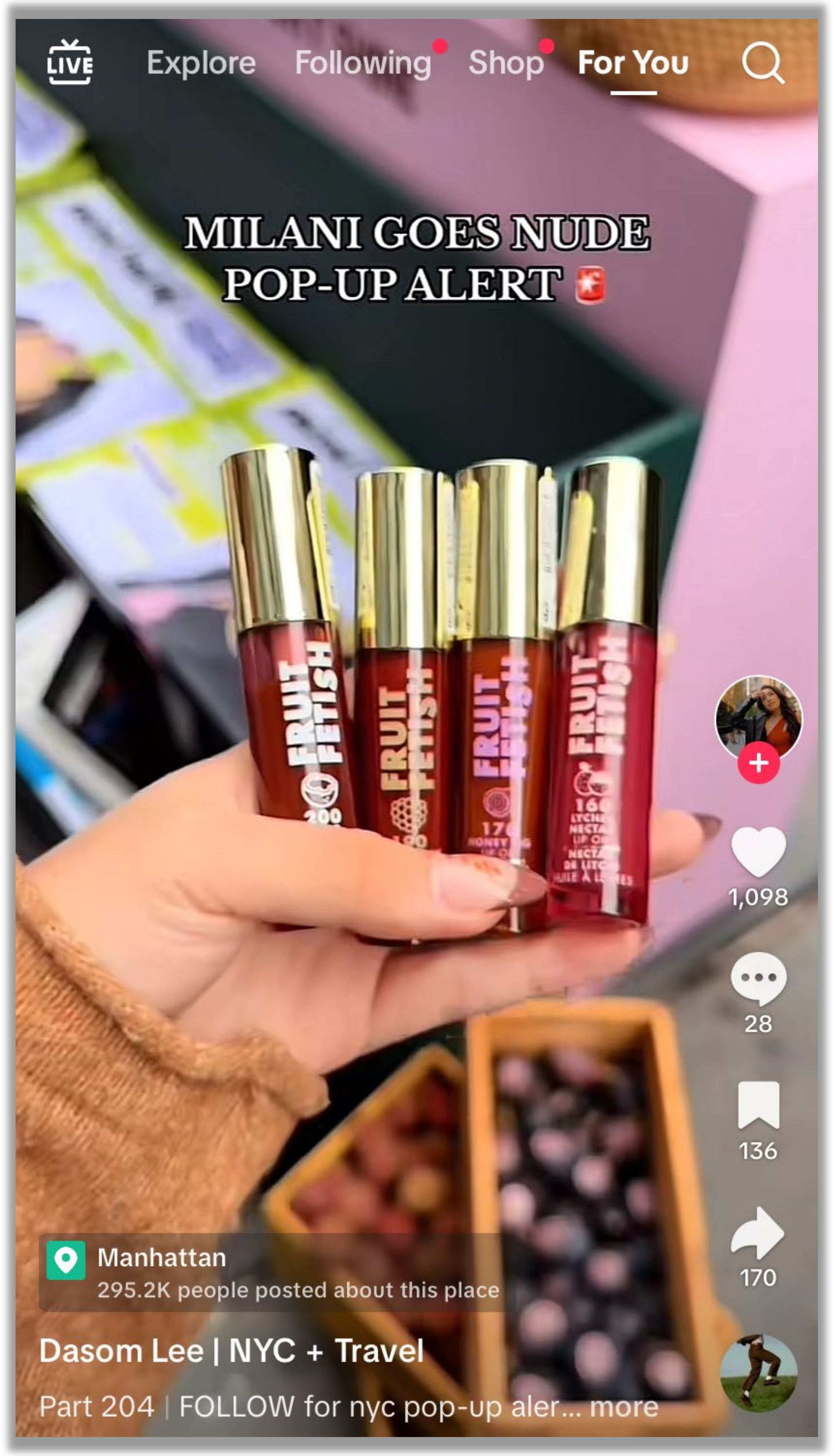
- Outbound community management
- Experiential marketing
- Community involvement



@sephora, TikTok, 4/21/2024



@hexclad, TikTok, 4/22/2024

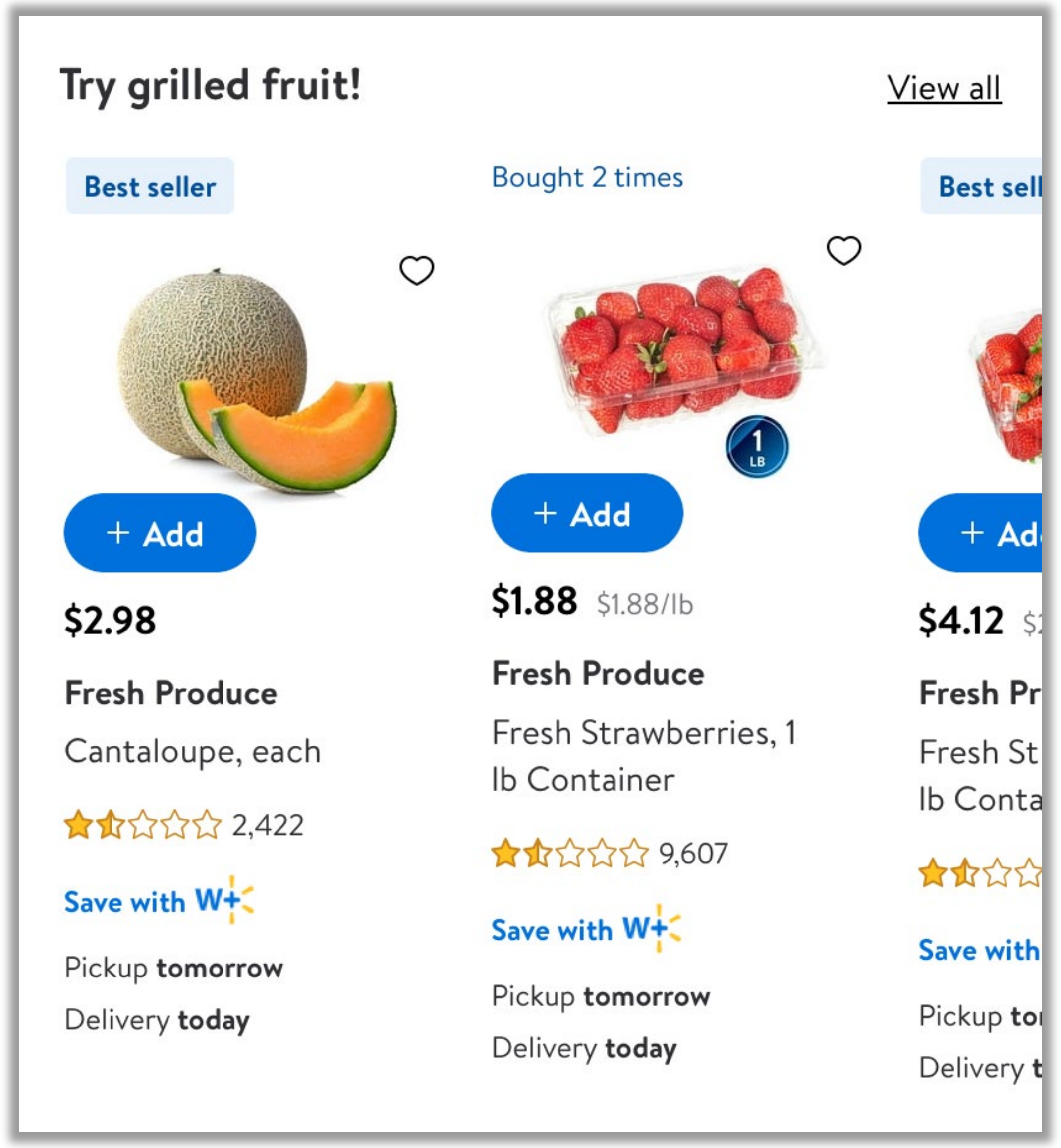


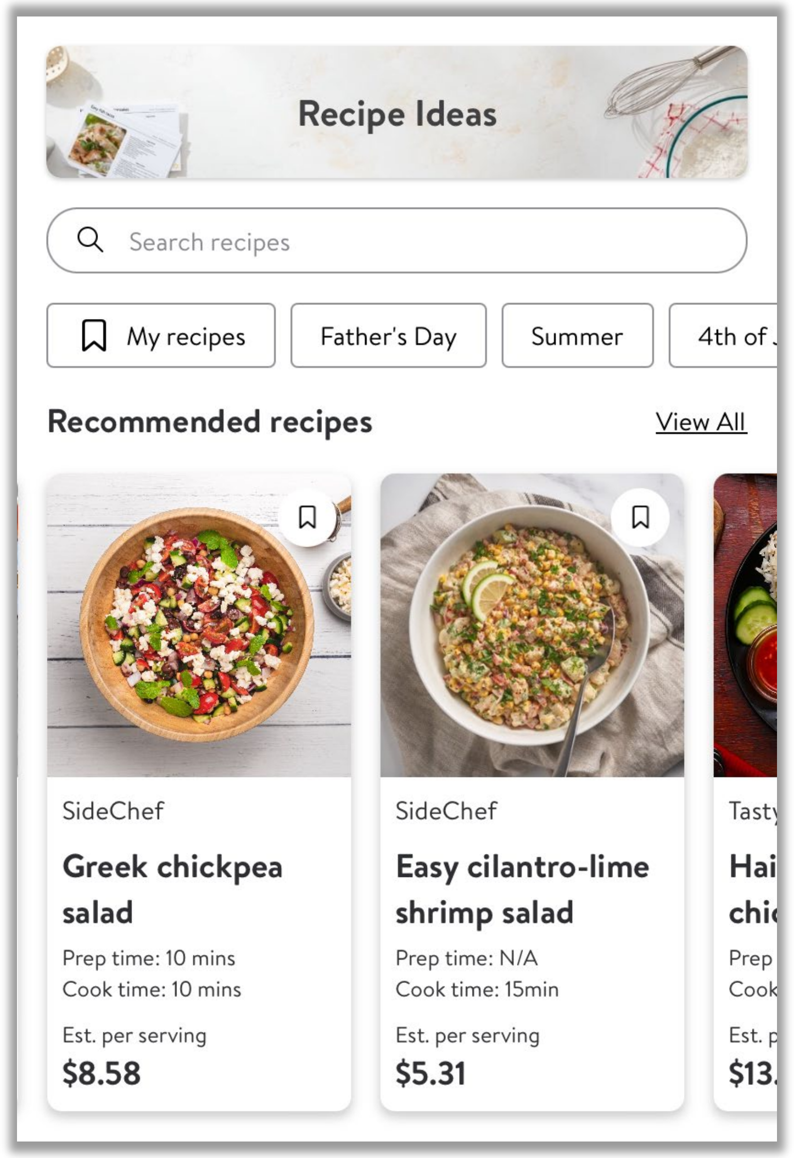
@explorewithdasom, TikTok, 4/21/2024

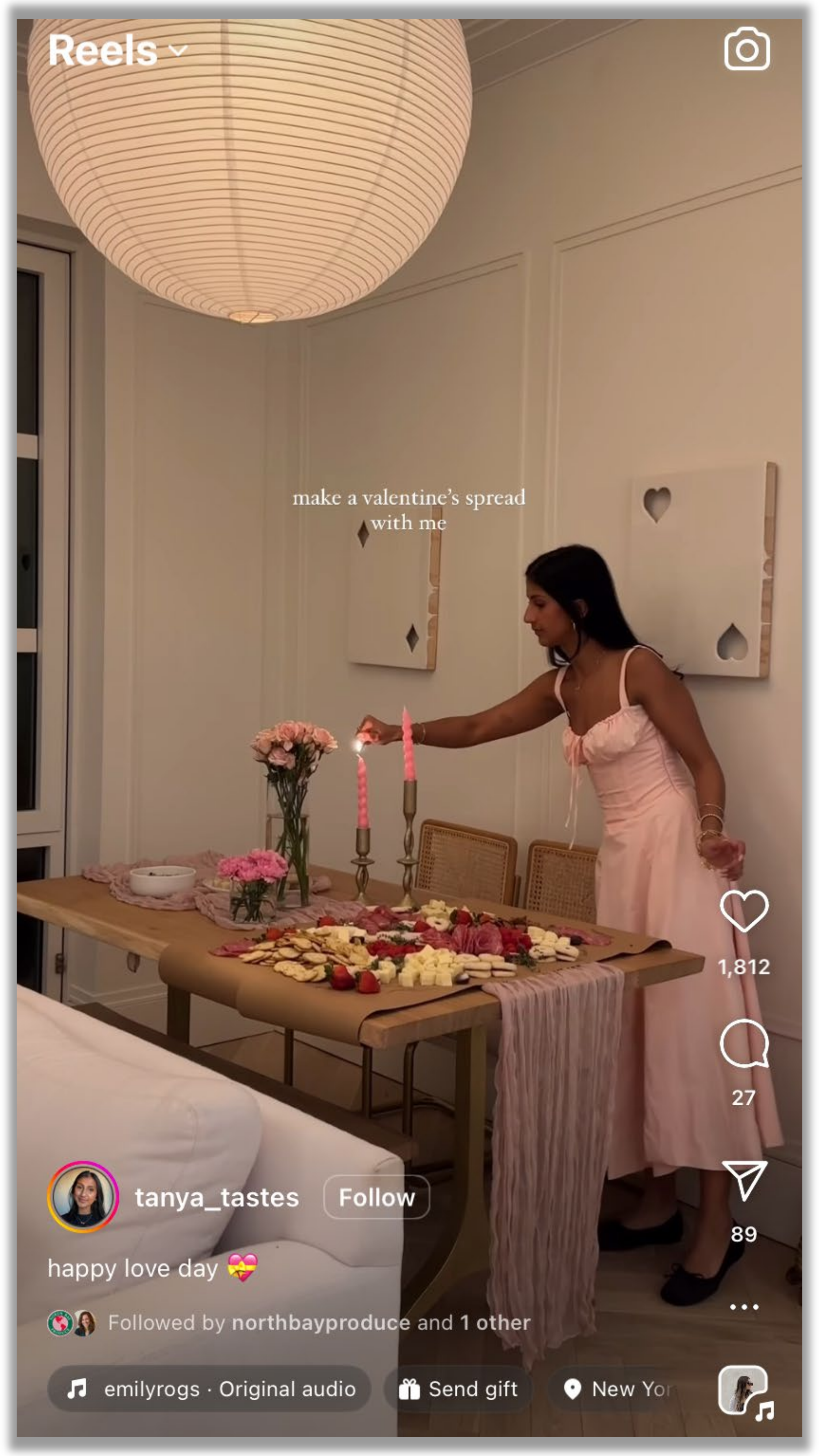
@vandycampusdining, Instagram, 6/14/2024

CULTIVATING A LOVE FOR PRODUCE

- Self-improvement & personal development
- Use marketing tactics from CPGs
- E-commerce platforms & online ordering
- Lean into younger generations





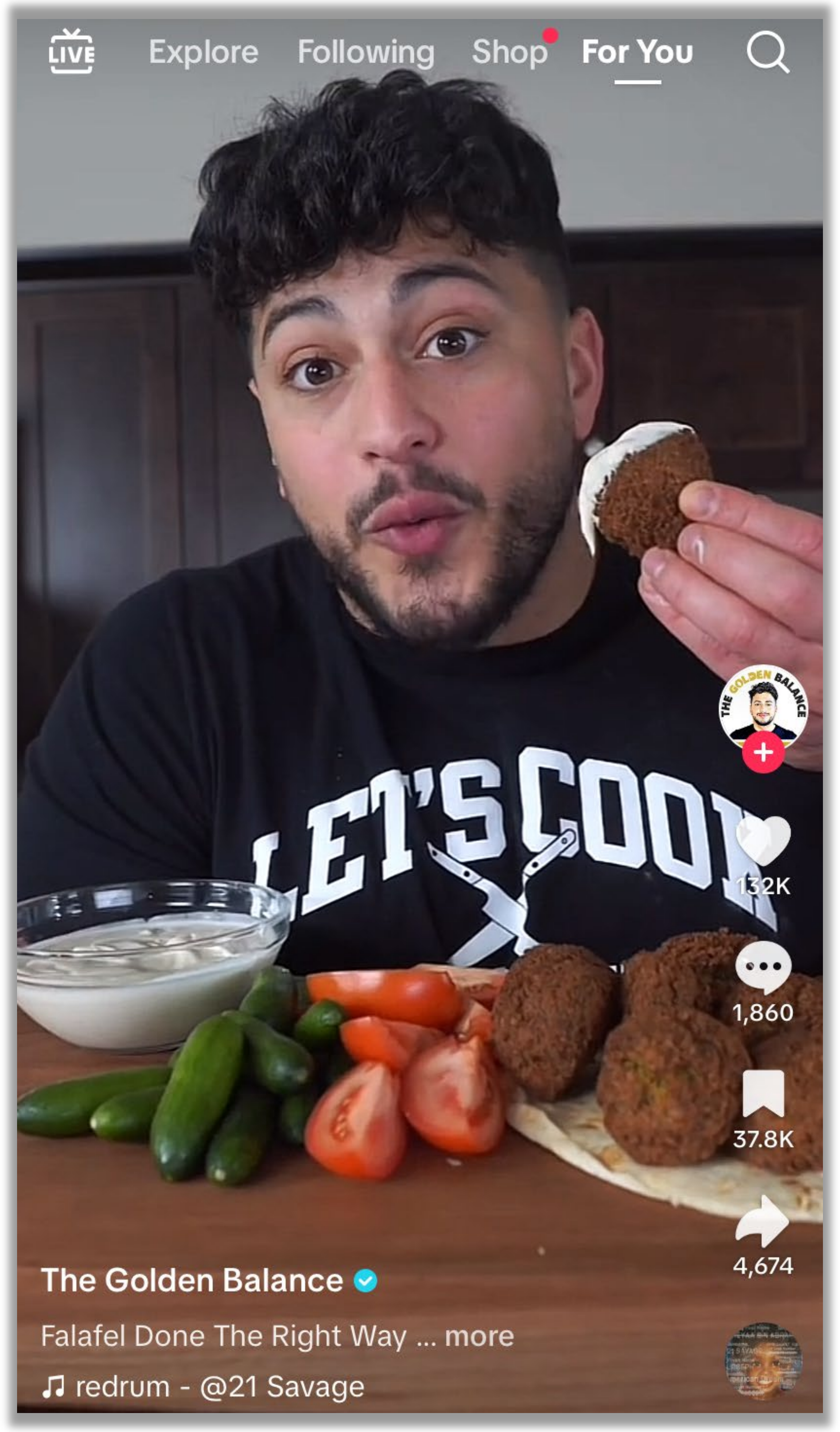


@tanya_tastes, Instagram, 4/21/2024

@foreverjenypher, Instagram, 4/21/2024

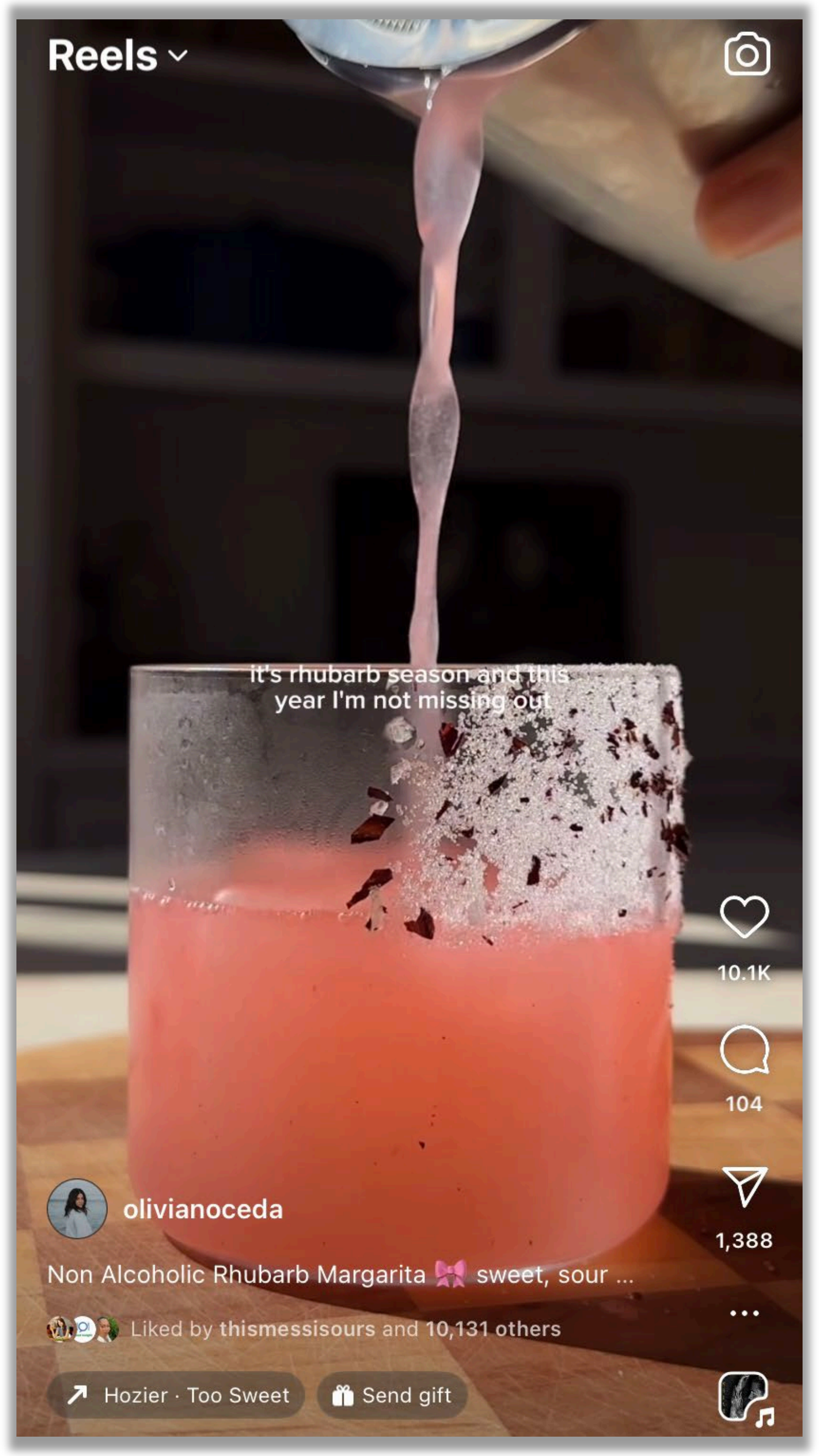
EXPLORATION & INNOVATION

- Incorporate timely trends & ingredients
- Reclaim the plant-based term & eco-conscious choices
- Convenience is key



@thegoldenbalance, TikTok, 4/21/2024

@tavernonmaincrownpoint, Instagram, 6/14/2024



@olivianoceda, Instagram, 4/21/2024

KEY TAKEAWAYS

- Come back to consumers' main focuses: **meaningful connections, health priorities, culinary exploration**
- Don't be afraid to **cross-collaborate** with other brands
- **Show up in spaces** where your target audience lives
- **Lean into pop culture & trends** with your own twist
- Continue to **test & learn**

QUESTIONS & DISCUSSION

JOIN THE MOVEMENT

SEPTEMBER IS NATIONAL FRUITS & VEGGIES MONTH #NFVM2024 #haveaplant

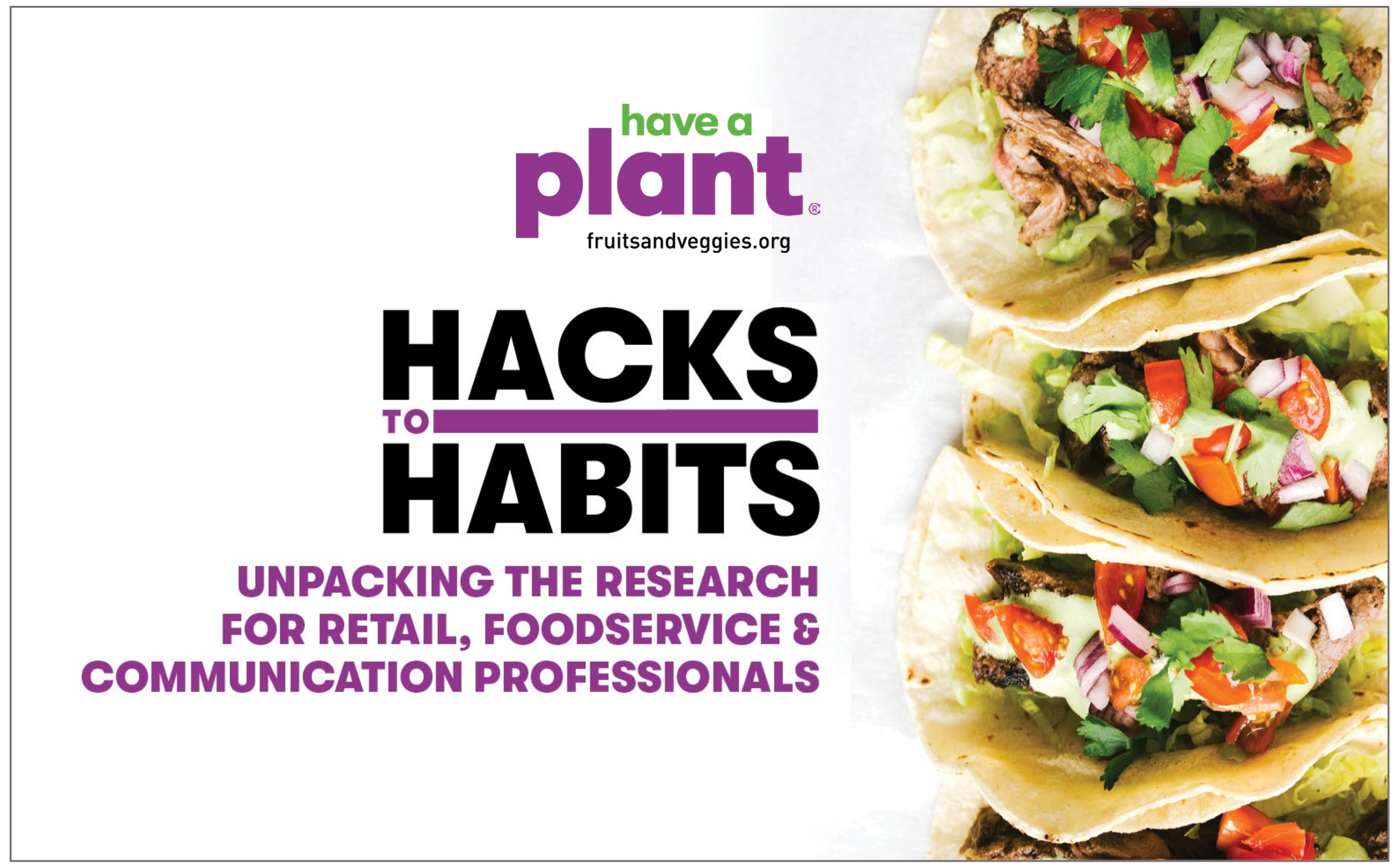
- Join the Have A Plant® community at fruitsandveggies.org/jointhenetwork
- Follow our social channels! #haveaplant

- Celebrate National Fruits & Veggies Month to elevate fruit and vegetable consumption to a national priority.
- Use the NEW Toolkit to start planning for #NFVM2024 today!

MORE FREE CONTINUING EDUCATION OPPORTUNITIES

fruitsandveggies.org/webinars

Visit our on-demand catalog of webinars on various fruit and vegetable topics including the following and many, many more!



THANK YOU!

We live at the center of produce, partnership and passion.

WE'RE SO HAPPY YOU'RE WITH US!