

HEALTH & WELLNESS WEBINAR

FRUIT & VEGGIE SHOPPING HABITS IN THE AFFORDABILITY ERA

Tuesday, July 15th at 2:00 PM EST









WELCOME



Katie Calligaro

Director, Marketing & Communications

The Foundation for Fresh Produce





Growing a healthier world by changing the trajectory of human health.







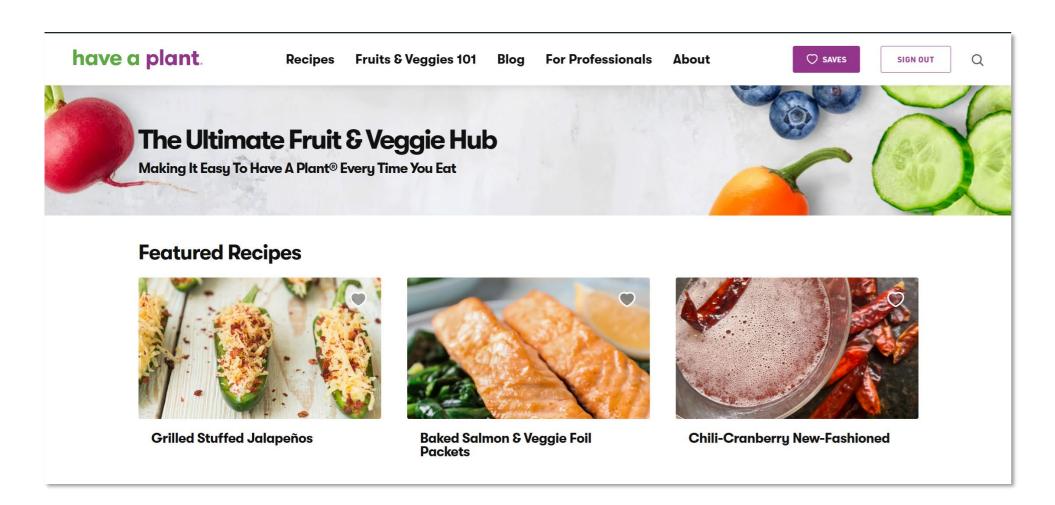




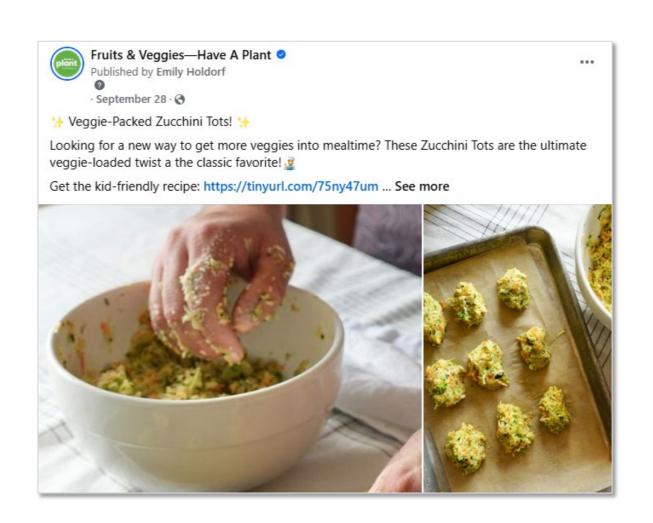
LEARN MORE

Have A Plant® Digital Ecosystem

Every Time You Eat, Have A Plant®



fruitsandveggies.org

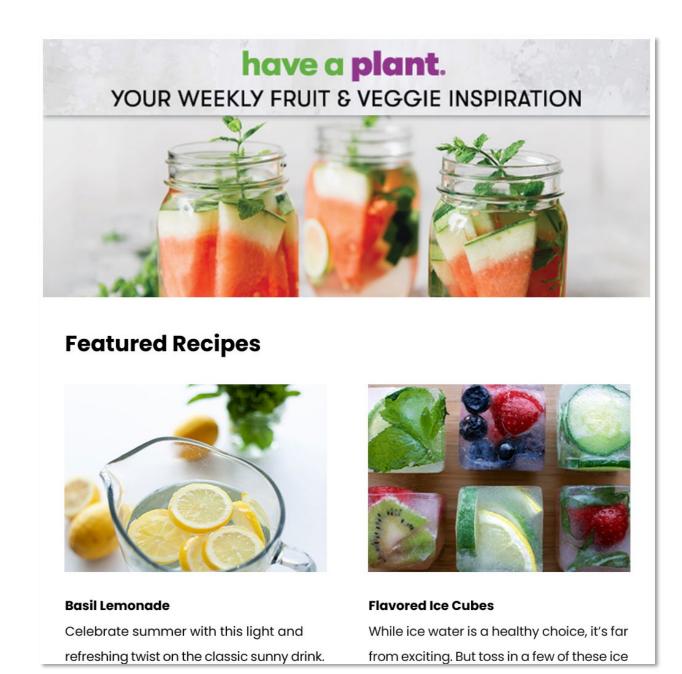


Social Media









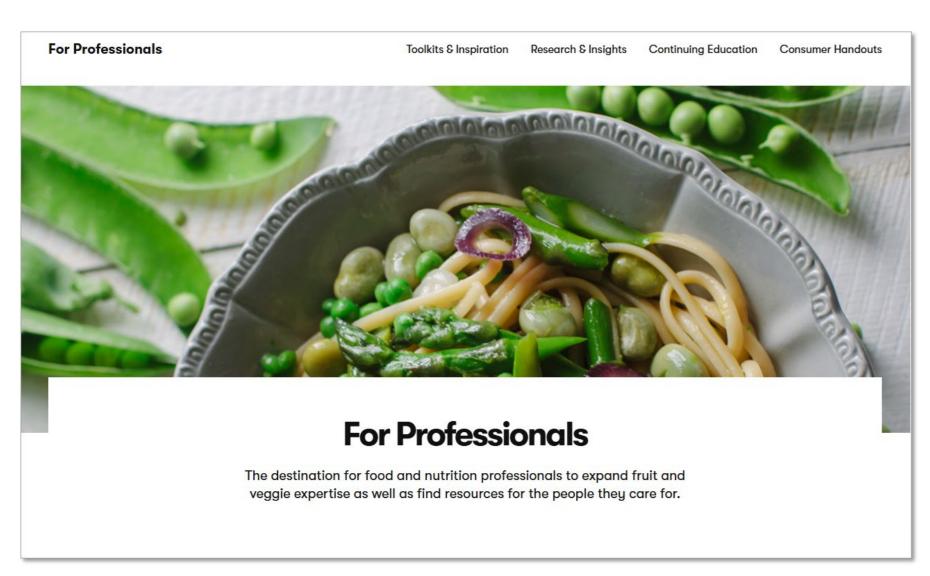
E-Newsletters
Consumer & Influencer

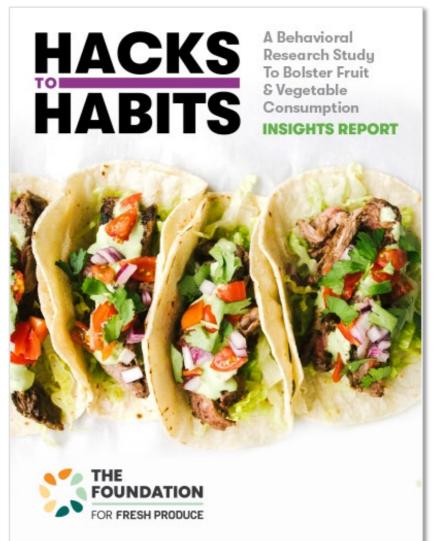


Resources For Professionals

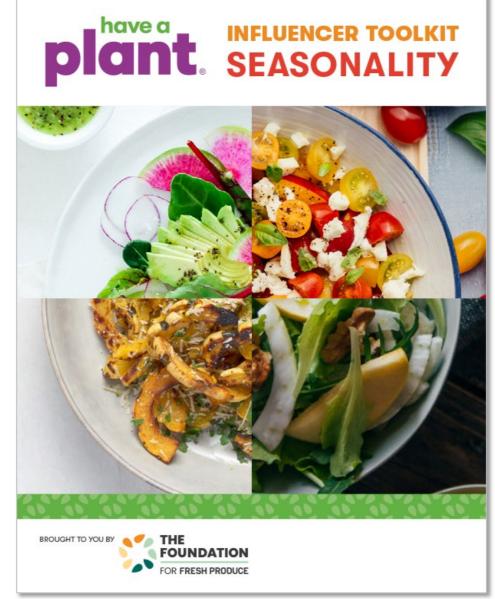
The destination for food and nutrition professionals to expand fruit and veggie expertise as well as find resources for the people they care for.

fruitsandveggies.org/for-professionals/









2025 Have A Plant® Content Calendar WINTER				
Say Hello To New Year #Goals Let's make enjoying more fruits and veggies fun with easy hacks.	Fruits & Veggies For The Heart Give yourself the love you deserve by enjoying fruits and veggies all month long.	Step Into Spring Reset the clock and embrace the arrival of spring! Make it easy to step into the new season with fruits and veggies.		
SPRING				
APRIL	МАУ	JUNE		
Spring Clean Your Routine Your guide to what's in season and all the tips and recipes you need to refresh your routine with fruits and veggies.	Feel-Good Food It's easy to add fun and flavor to everyday moments that will keep you feeling happy and healthy.	Effortless Outdoor Entertaining What better way to boost your mood than enjoying fruits & veggies outside? Elevate your outdoor entertaining spread to welcome in the start of summer.		
SUMMER				
JULY	AUGUST	SEPTEMBER		
Celebrating Summer Isn't summer the best? Soak up as much as you can with these tasty ideas for adding produce to your summertime faves.	Simply Savor Summer Simplicity is key when it comes to maintaining habits. Make the most of the summer's harvest with ideas for simple snacks, routines, and solutions.	Cheers To National Fruits & Veggies Month It's National Fruits & Veggies Month, and we are ready for a plant party!		
FALL				
OCTOBER	NOVEMBER	DECEMBER		
Fabulous Fall Flavors Celebrate the season's bounty with the feel-good flavors of fall faves.	Sensational Seasonings Cooler weather calls for gathering 'round the table for something warm from the kitchen — like perfectly seasoned stews, soups, casseroles and chilis!	Hack The Holiday We've got you covered with all the fruit and veggie inspo you need for the ultimate holiday celebrations!		



Housekeeping

Completion of this webinar awards 1.0 CPEUs in accordance with the Commission on Dietetic Registration's CPEU Prior Approval Program.

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.

Funding from non-CPE revenue for CPE planning, development, review, and/or presentation has been provided by the International Fresh Produce Association.



Learning Objectives

- 1. Analyze and understand current consumer trends and behaviors related to fruit and vegetable purchasing, including shifts in perceived value and shopping frequency.
- 2. Evaluate the emotional, economic, and logistical factors influencing produce selection and consumption among cost-conscious shoppers.
- 3. Design evidence-informed strategies to support increased fruit and vegetable consumption by helping consumers maximize their produce purchases within budgetary constraints.



TODAY'S SPEAKERS





Jonna Parker

Vice President, Fresh Foods Group Circana, Inc.

Disclosures:

Jonna Parker

• Employer: Circana, Inc.

Emily Holdorf

- Employer: International Fresh Produce Association
- Serves on Cornell Cooperative Extension's Program Advisory Committee for Nutrition, Health & Safety

Emily Holdorf, MS, RDN, CDN

Influencer & Community Manager
The Foundation for Fresh Produce



Fruit & Veggie Shopping Habits in the Affordability Era

July 2025



Circana: Complexity to Clarity for Food & Bev





Fruit & Veggie Shopping Habits in the Affordability Era



Current Consumer Climate

Produce Power

Strategies for Growth





Consumers expectations of price increases continue to rise

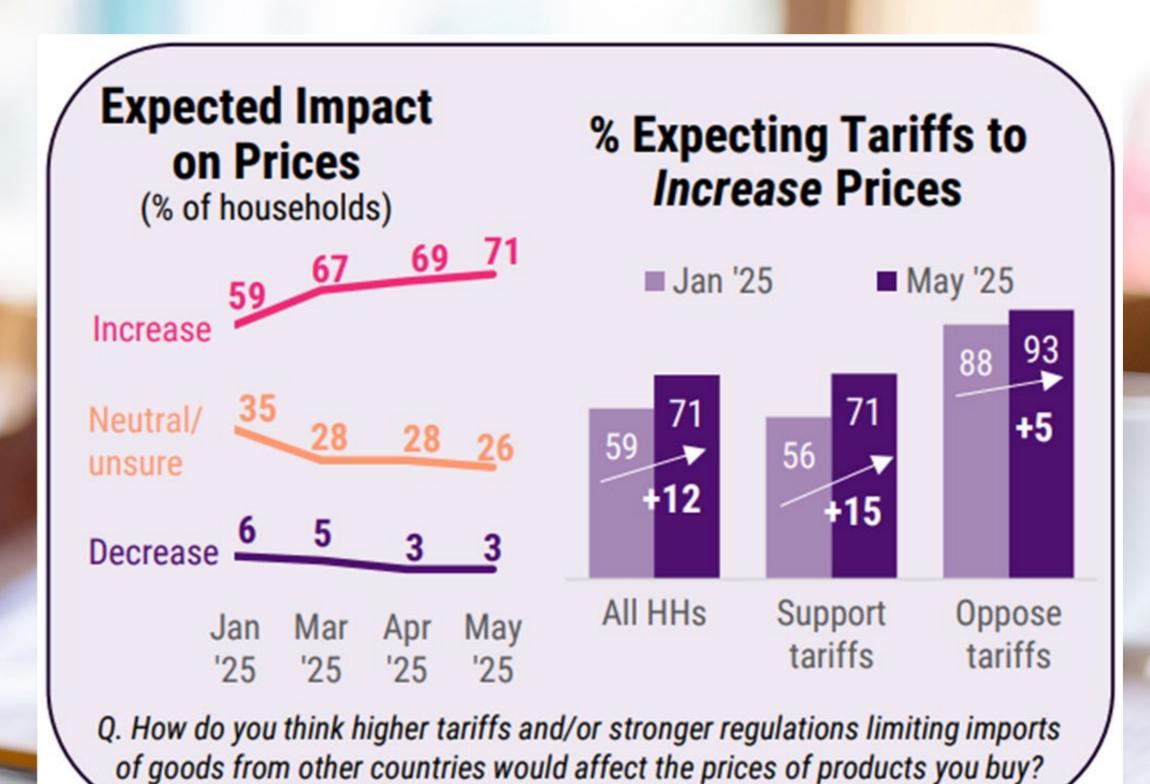
71%

of American consumers believe tariffs will lead to higher prices, +12pts from Jan '25

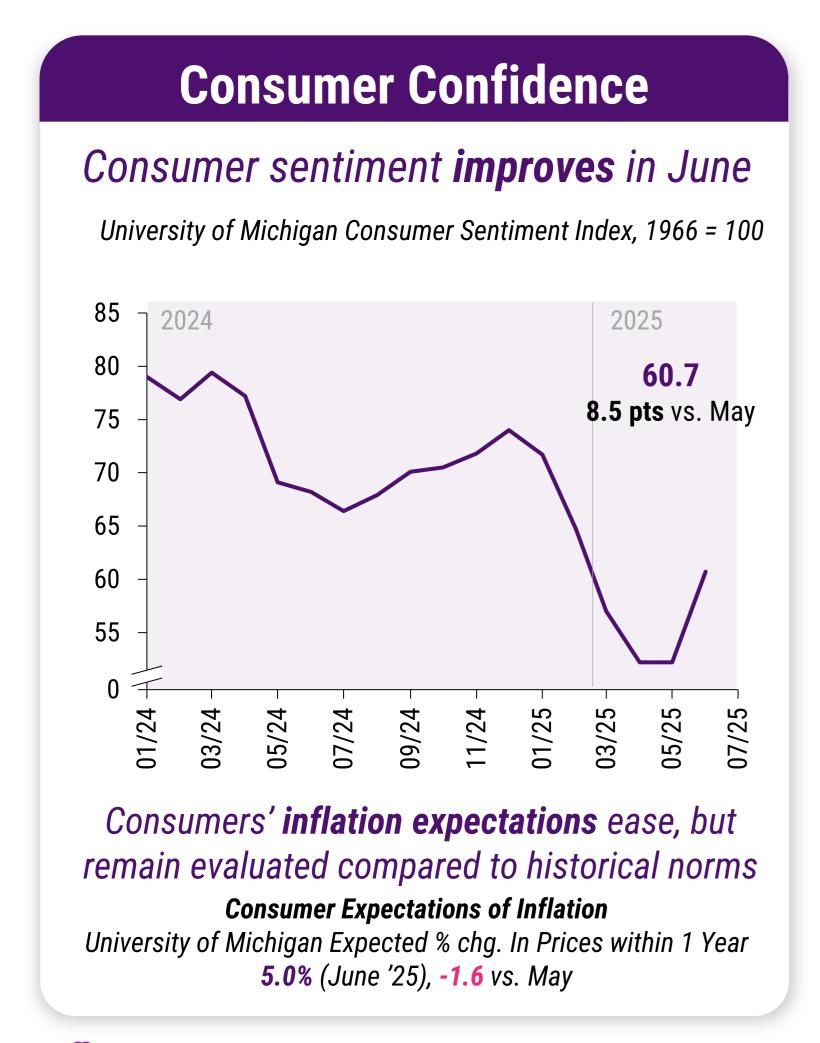
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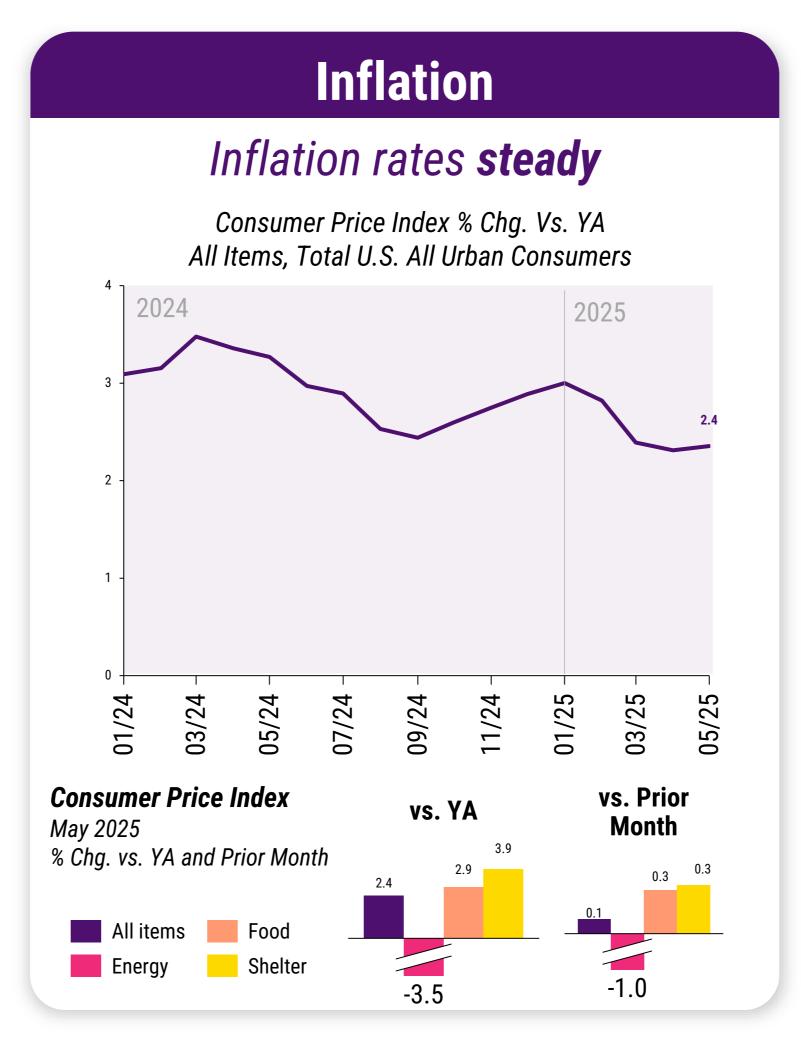
of households foresee tariffs having negative effects on wages & employment, +6pts from Jan '25

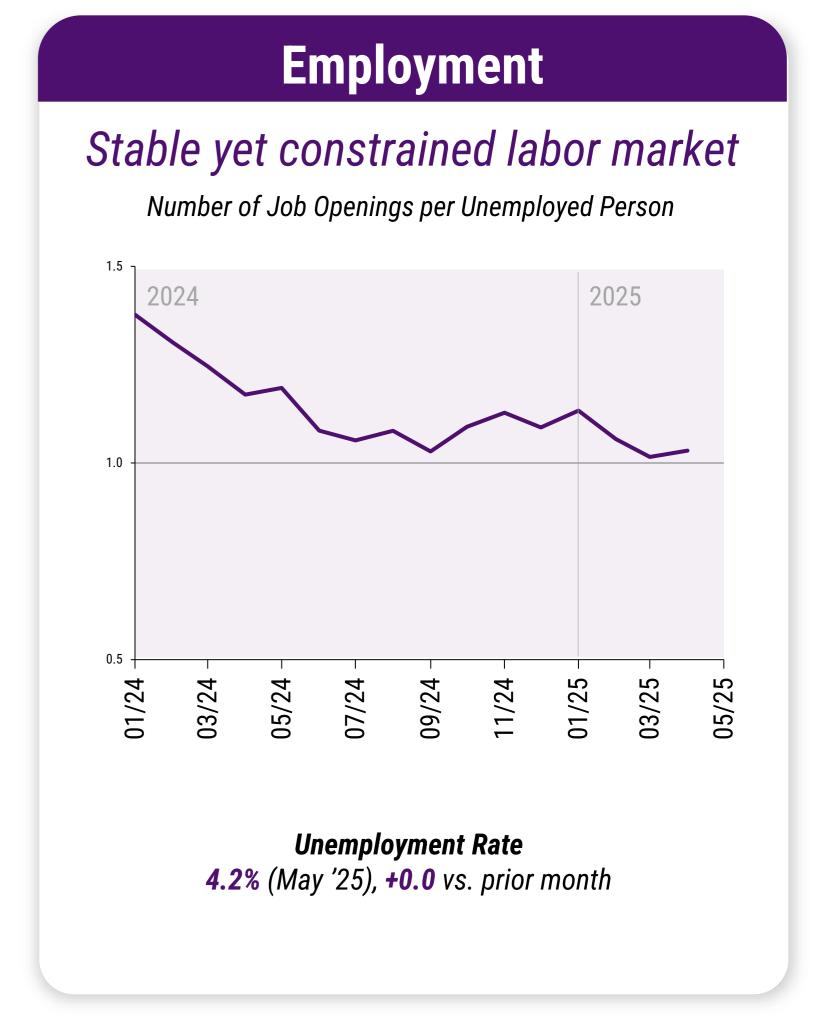




Consumer confidence rebounds modestly in June, though concerns over inflation and tariffs continue to weigh





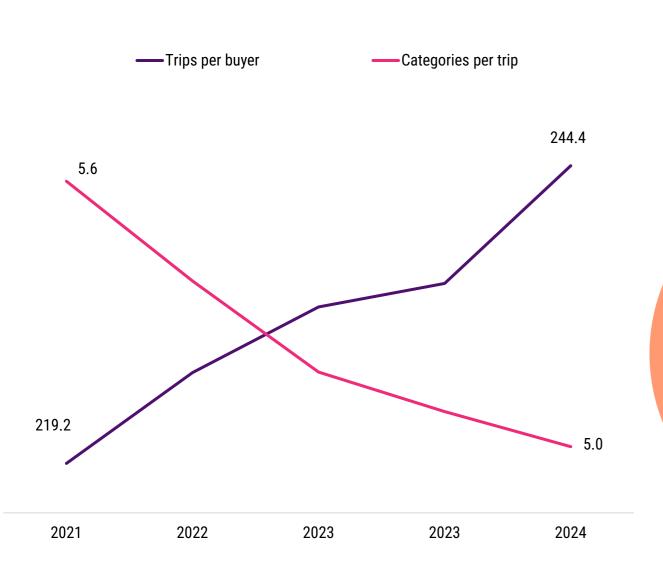






Shopping patterns shifted – just-in-time shopping era

Frequency and Basket Diversity



Number of unique categories per trip

-11%

Since 2021

Fresh foods* 2024 all-time high, +5 trips in one year,

Produce is the most frequently bought fresh department – 8 more trips than Dairy, 12 more than Meat

12 produce categories are more frequently bought than the entire Seafood department

Tree Fruit, Grapes, Mangoes, Berries, Avocadoes, Mandarins saw +4 trips or more vs prior year



Source: Circana, A Day in the Life of the Complete Consumer, April 2025 and Top Trends in Fresh, March 2025

Circana, LLC | Proprietary and confidential



Keeping less food on hand means every occasion is rationalized

Consumers aren't stocking their pantries as deeply as they were at the start of the pandemic. What we're buying (and eating) must work for us to spend on it.

162
2020

1462023

142
2024

Lower growth further accelerates share shifts for fresh foods away from traditional grocery

Channel Contribution to US Retail Dollar Sales Growth- Produce Dept

	% of 2025 YTD Sales	% contribution to market \$ growth	Fair Share
Food Traditional	46.4%	7%	16
Food Natural	3.7%	9%	252
Food Value	10.4%	6% 6%	56
Mass	18.6%	18%	98
Club	13.8%	38%	274
Internet	3.4%	22%	663
Specialty Stores	1.4%	3%	236
Other	2.1%	4%	-205



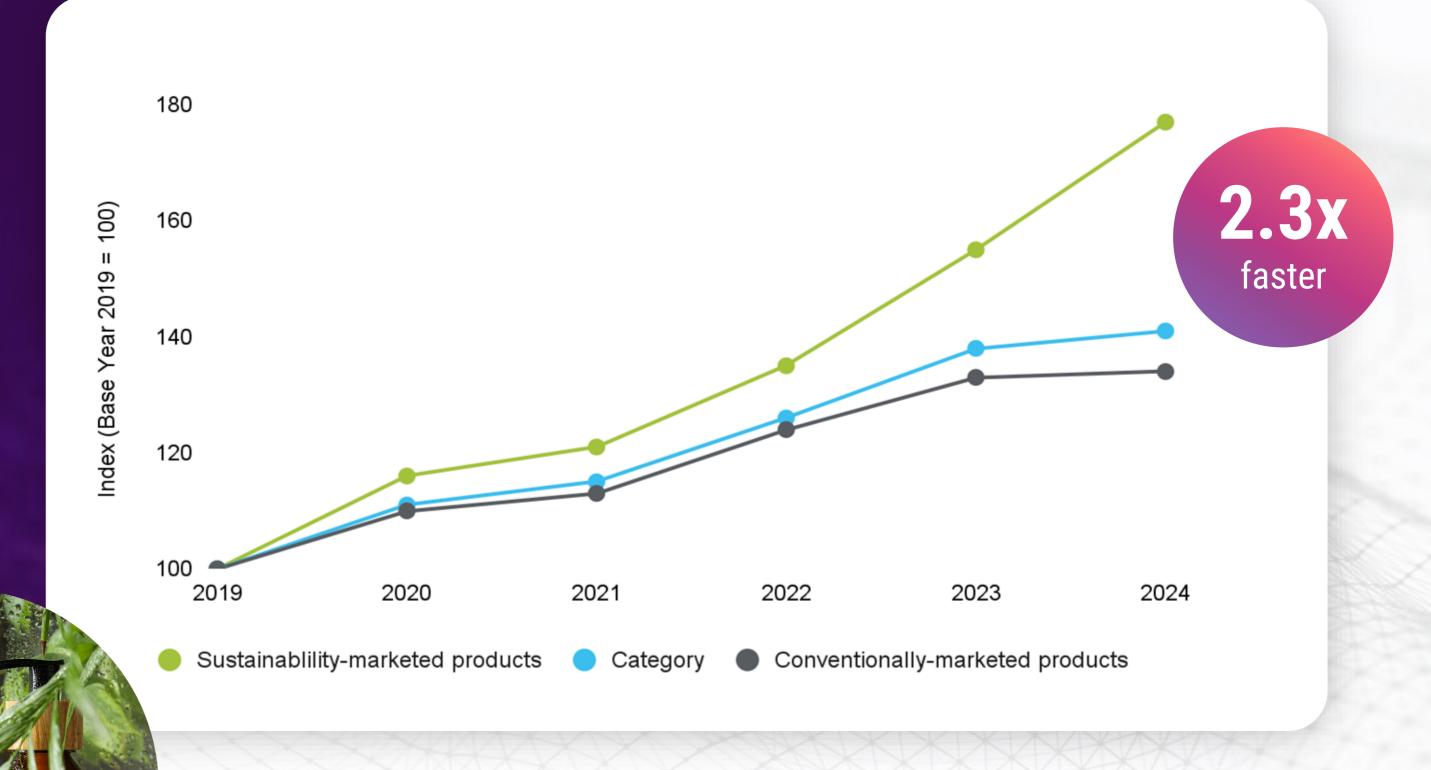


Source: OmniConsumer Integrated Fresh Year To Date 2025, data ending 5/18/2025, All Outlets, "Food" indicates grocery/supermarket, internet is pureplay online retailers, Mass includes Supercenters, Specialty stores includes independent shops (delis, farm stands, bakeries, etc.) All Other includes Convenience stores.

Since 2019, sustainabilitymarketed products have grown more than 2x faster than conventionally marketed products

Sustainable Market Share Index™ **Growth Rate 5-YR CAGR**

Circana.



Sustainability-Marketed

+12.4%

Total Market

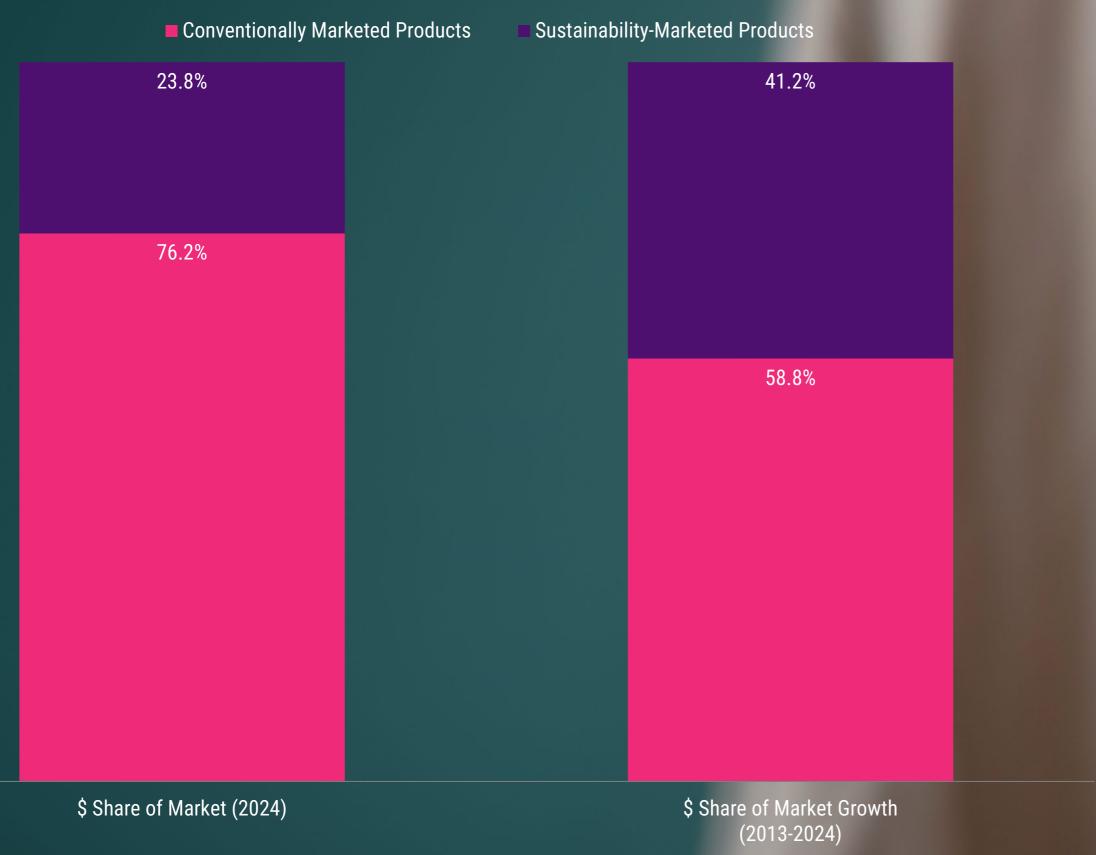
Conventionally Marketed

+5.4%

Note: Based on 36 categories examined

Sustainability-marketed products have delivered more than 40% of growth since 2013

Despite sustainability-marketed products being less than a quarter of the market share, they delivered an outsized share of growth.









Consumer wellness expands outside of physical health alone

Wellness Goals Through F&B Choices (Percent of Adults)







Source: Circana, NET® HABTS, year ending Dec. 2024.

Circana, LLC | Proprietary and confidential

Category sales connections exist based on how products align to GLP-1 diet needs

Categories that align with needed benefits for GLP-1 weight loss users:

- Gum, breath fresheners and non-chocolate candy to help with dry mouth and bad breath
- Shelf-stable non-fruit drinks for hydration
- Tea to soothe the stomach
- Fiber from beans
- Protein, fiber and healthy fats from nuts



e.g., saturated fats, high levels of sugar, processed meats, beverage alcohol, spicy foods, etc.

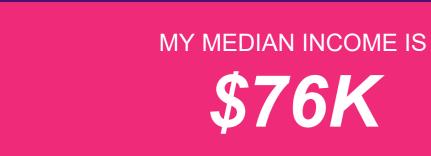


Produce is **not gaining** new Health-Conscious Consumers & are **losing** engagement with **vegetables**



Healthy Chic consumer segment

Committed to feeling good and know that diet and exercise are the key- very healthy eater—always trying to do new things to improve my eating and actively seek out information about health-related topics.



MY MEDIAN AGE 44





Fresh Fruit



98.7% of HH buying

-0.1% vs YA



\$599.2 per buyer

+5.4% vs YA



\$7.6 per trip

+2.2% vs YA

Fresh Vegetables



98.7% of HH buying

-0.3% vs YA



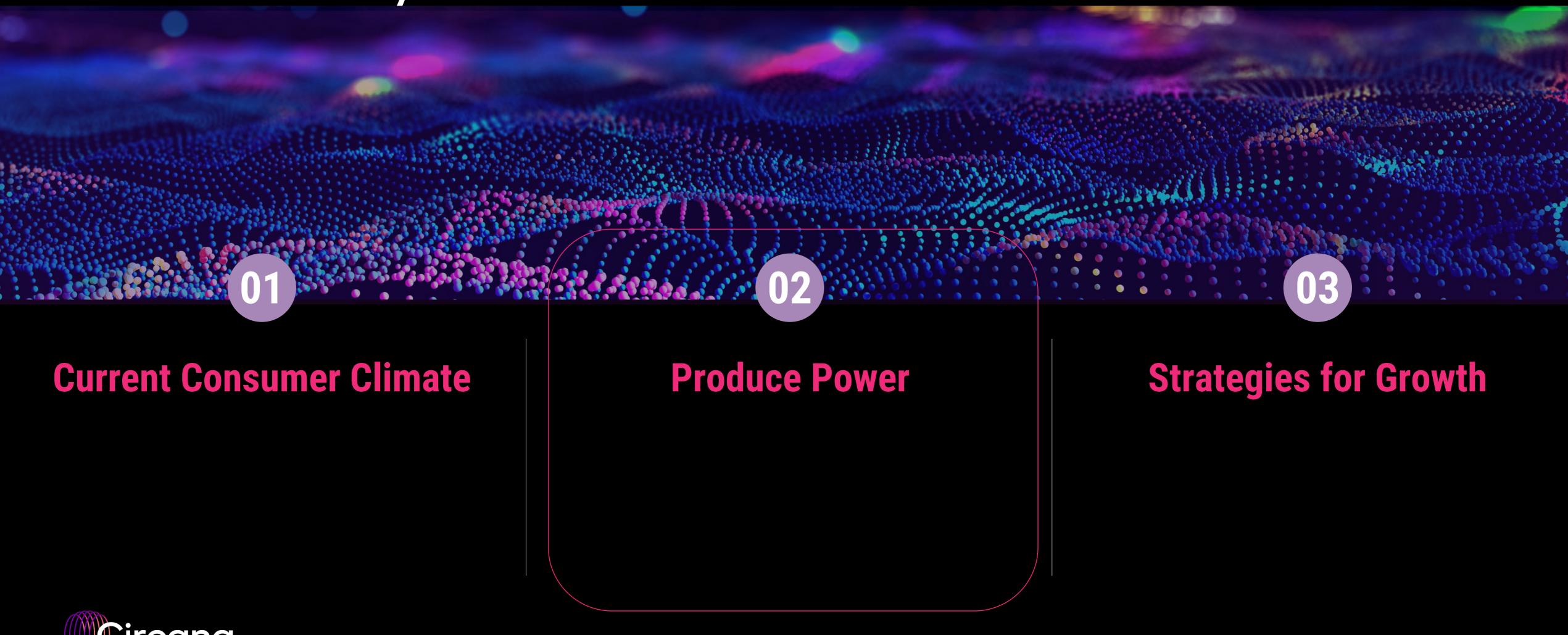
\$531.6 per buyer

+0.3% vs YA



-1.1% vs YA

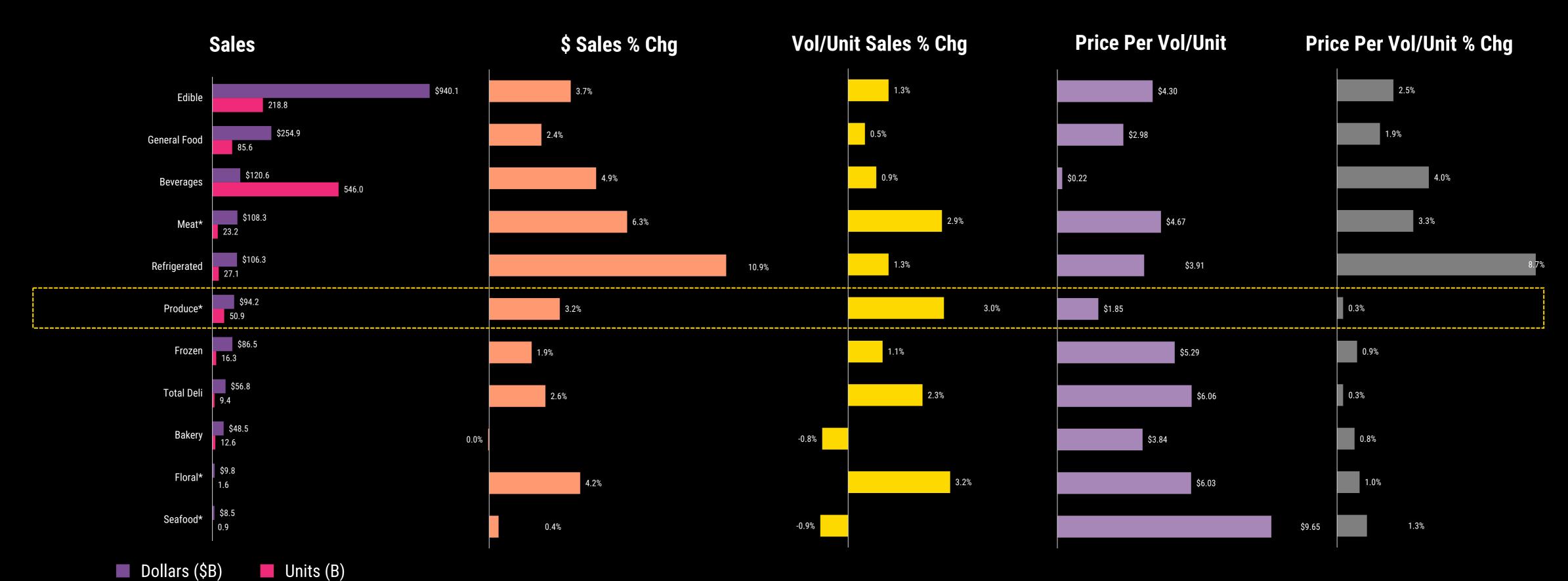
Fruit & Veggie Shopping Habits in the Affordability Era





Food & Beverage Sales Performance Scorecard

The Produce department sees one of the largest volume/unit sales growth across all departments, behind Floral

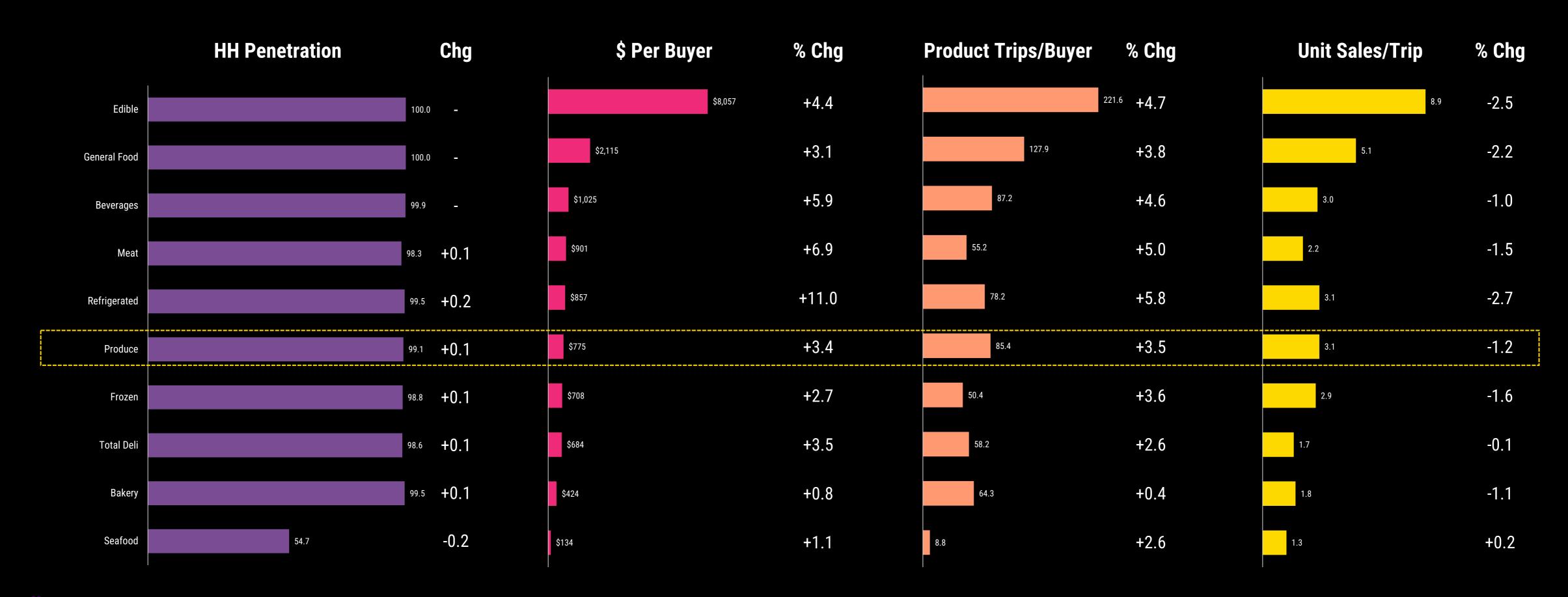




Source: Circana Integrated Fresh, Mulo+, L52 06/22/2025 *Volume (lbs)

Total Food & Beverage Shopping Behavior Scorecard

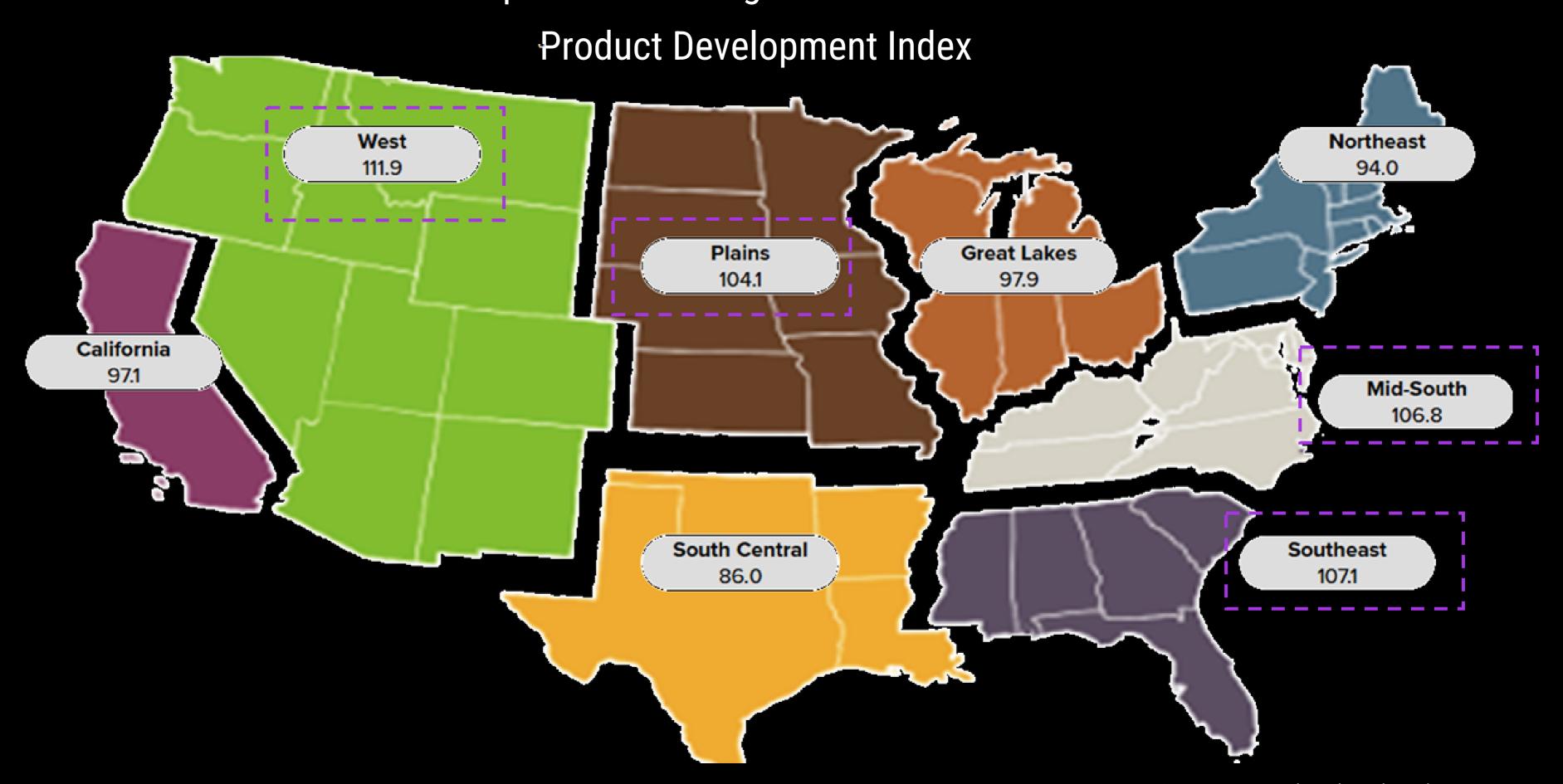
While Produce continues to see growth in overall \$s spent & trips, units bought per trips are down showcasing an opportunity





Produce is over-indexed in a few key regions where we have seen shifts in population

Dept- Produce- Regional Multi Outlet+

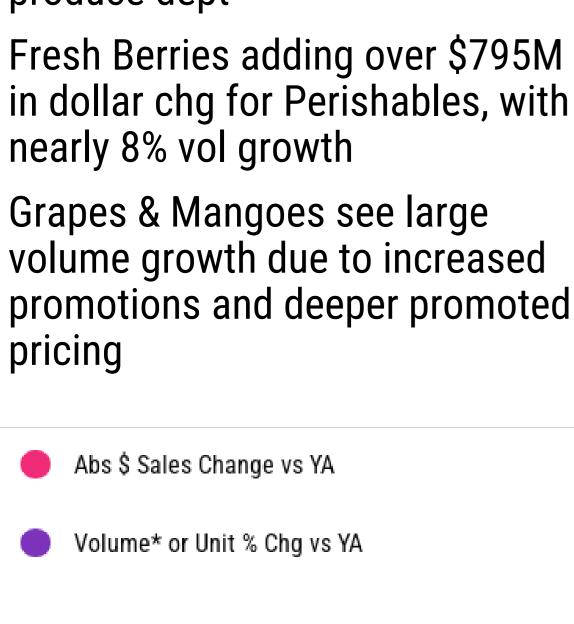


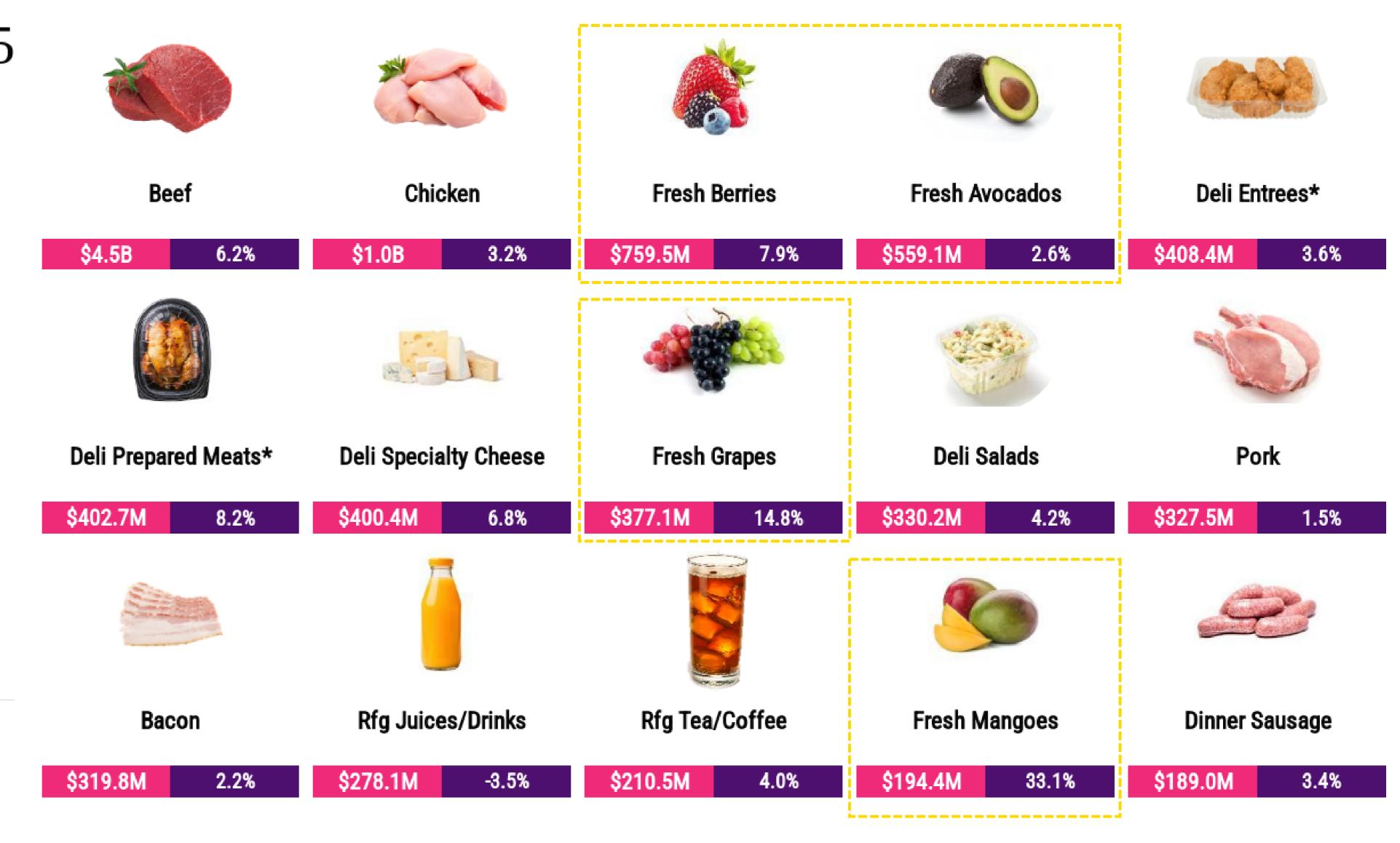


Fresh Foods Top 15 Categories by Absolute Dollar Change

4 out of the top 15 fresh dollar growth categories are from the produce dept

promotions and deeper promoted







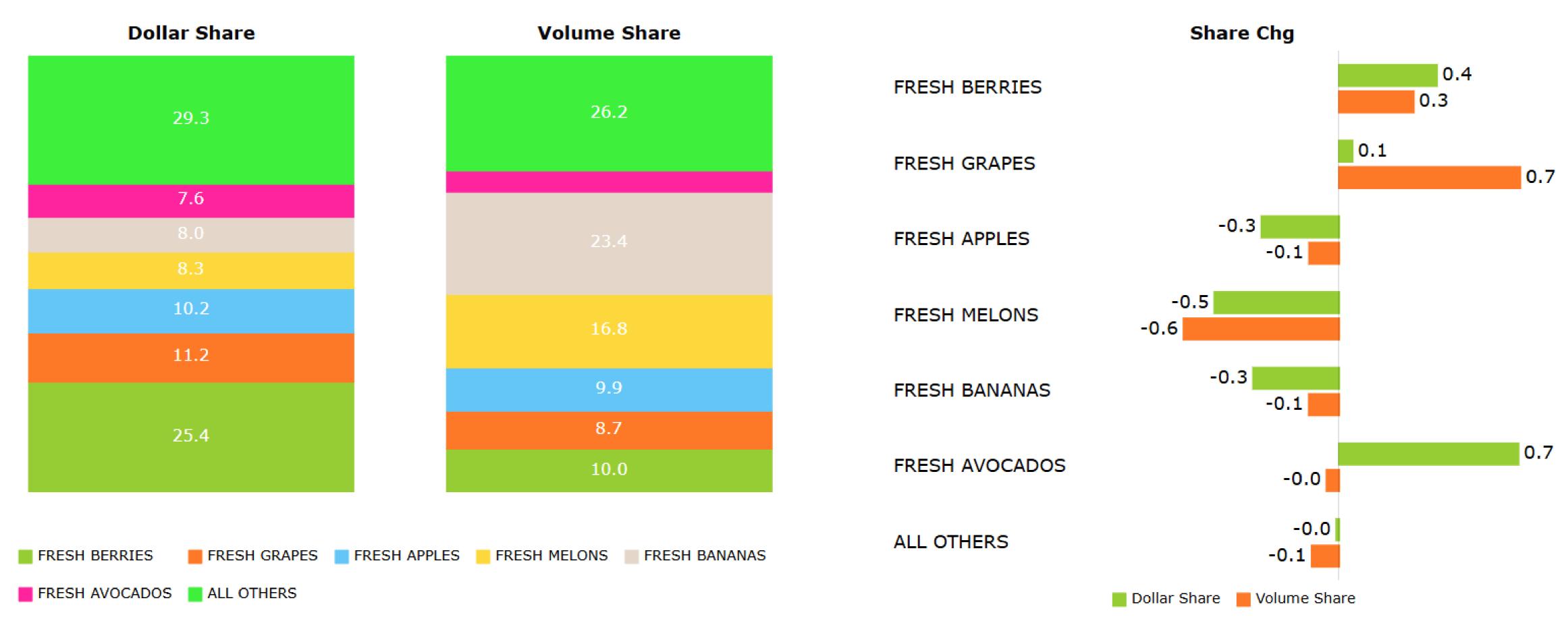
Source: Circana Integrated Fresh, Total US MULO+, Year to date 2025 ending 6/01/2025

Note Units* used when volume is not equivalized at the dept level. Beverages, Meat, Produce and Seafood are in volume.

25% of dollars spent on Fresh Fruit comes from Berry purchases, seeing large share gains while Grapes lead in overall share gains





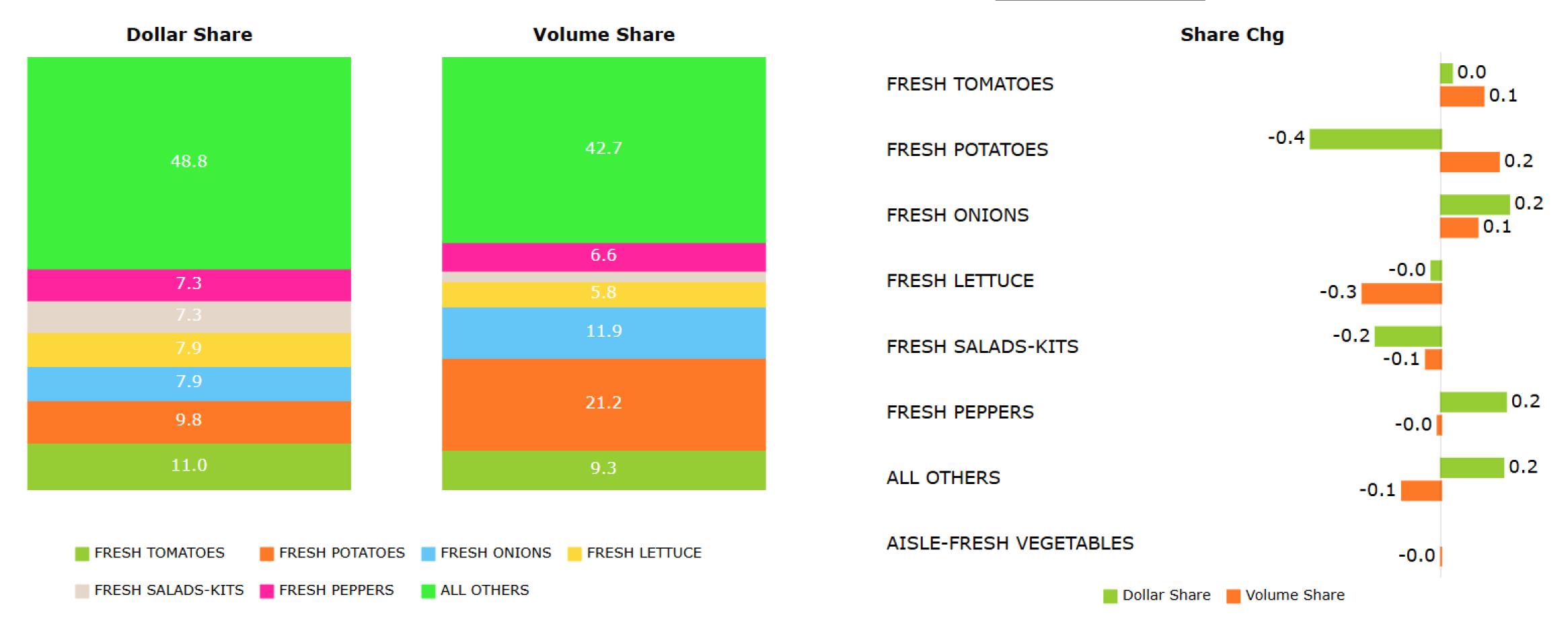




Fresh Vegetable pounds have a wide split with the Potato/Onion table driving a third and the long tail of 30+ products driving 27%



AISLE-FRESH VEGETABLES by Dollar and Volume Share





Despite inflation and economic headwinds, **ORGANIC** produce pounds L52 grew **+6%** and dollars **+4%** continuing to grow share





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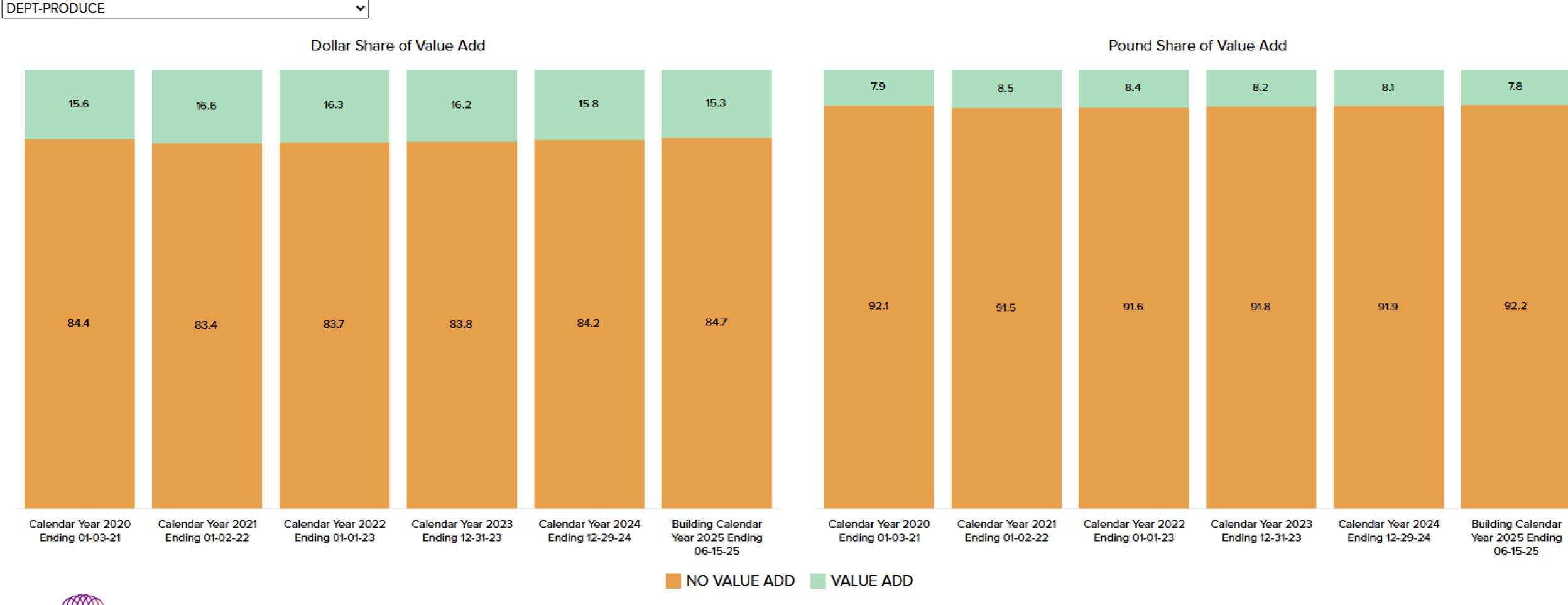
Organic Produce Categories by Vol(lbs) Sales Growth:

- Bananas
- 2 Mangoes
- 3 Grapes
- 4 Berries
- 5 Broccoli

- +147M lb
- +21M lb
- +21M lb
- +16M lb
- +13M lb

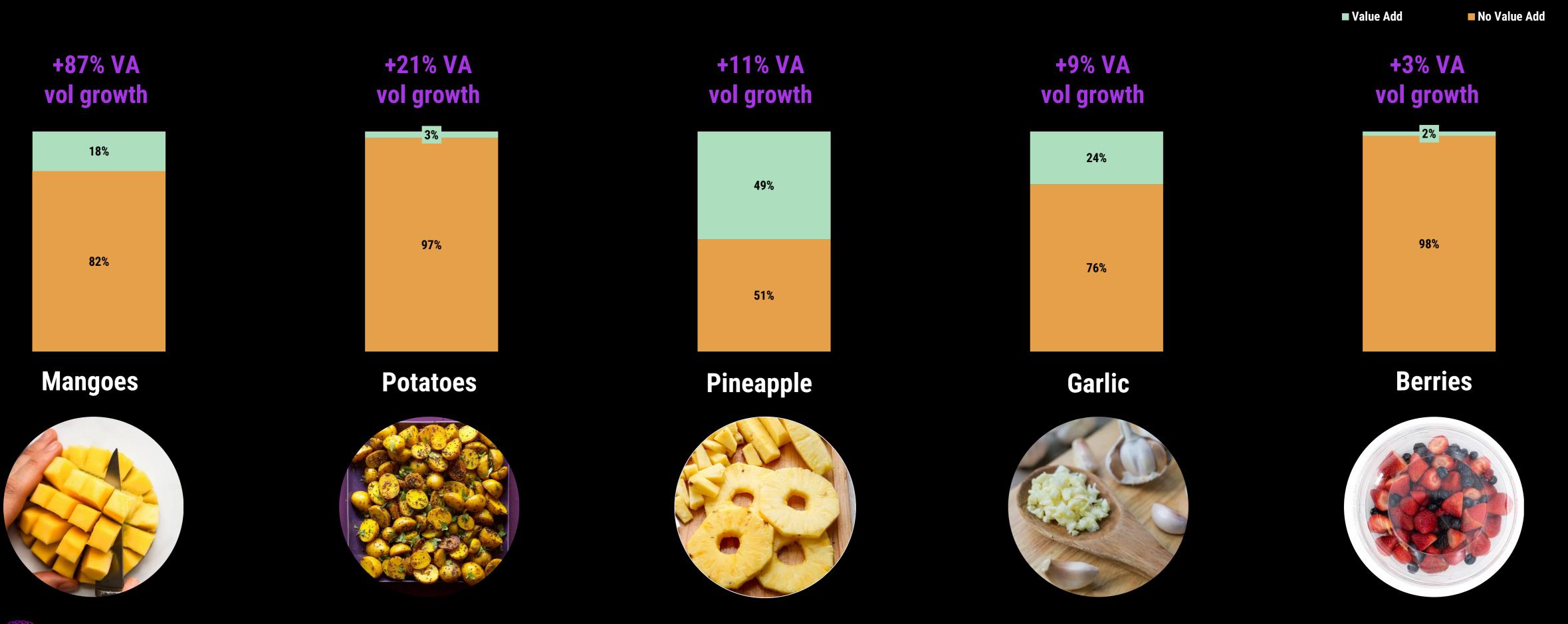


Value Add Produce has seen a steady decrease in dollar & volume share since '22





There are some key produce categories that saw significant growth within value add





Unprecedented Era of 5 Diverse Generations

UNPRECEDENTED LONGEVITY & NAVIGATING A NEW ERA



1925-1945 Older Generations



1946-1964

Boomers



1965-1980

Gen-X

Shopping at supermarkets for groceries and comparing prices across similar fresh commodities using circular ad sales



BRINGING UNPRECEDENTED LIFE EXPERIENCES TO NAVIGATE ADULTHOOD IN THEIR OWN WAY



1981-1996

Millennial

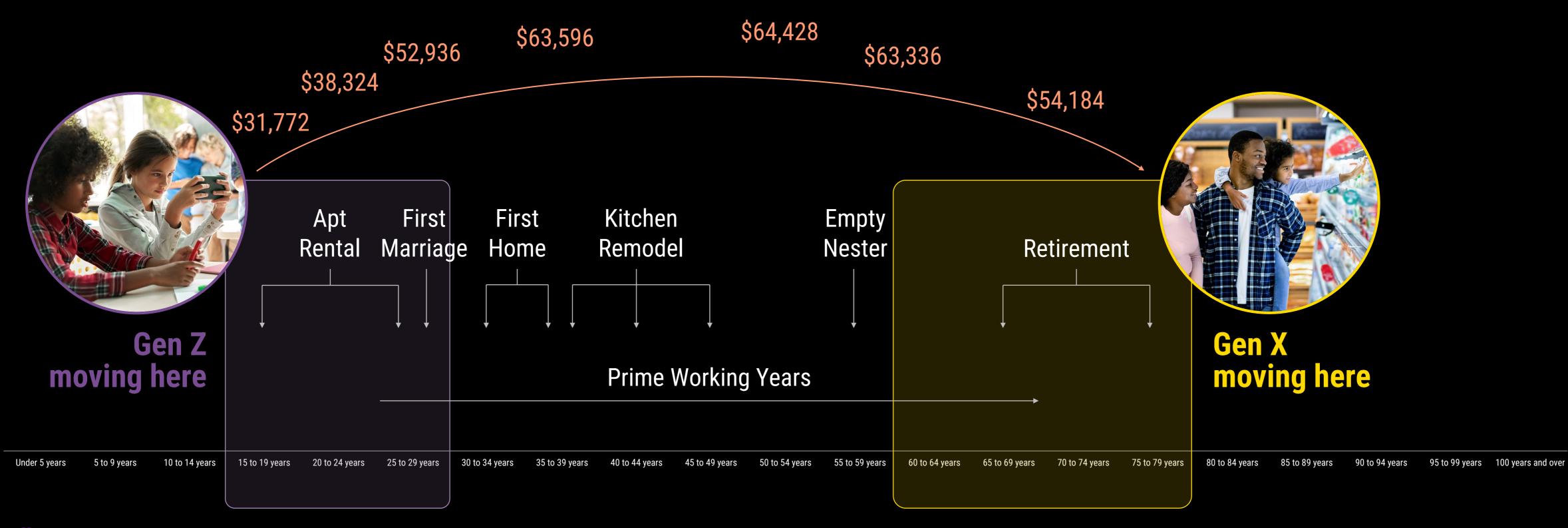


1997-2012

Gen Z

Smartphones • Economic Uncertainty • COVID-19
Personalized Choices • Sustainability
Social Media • e-Commerce
Food Available Anywhere & Anytime

Life Stage Shift: Understanding Generational Inflection Points Bring Opportunity for Produce





In Produce, Generational Shift Underway

Reduced Produce Spending in Older Millennials Troubling & Unexpected Trend

(1997 or after)

Gen Z



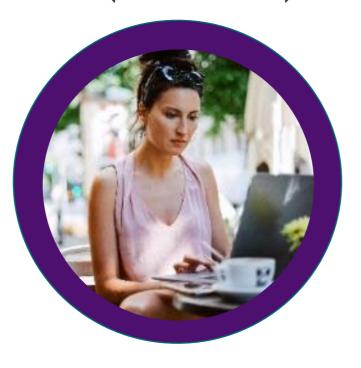
Older Millennials (1981-1989)

Gen X (1965-1980)

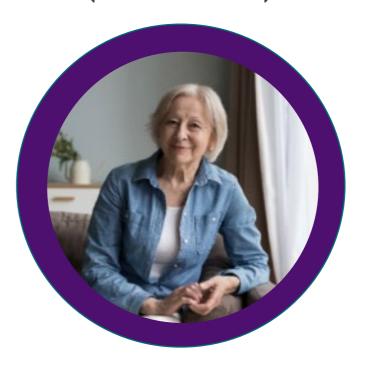
Younger Boomers (1956-1964)

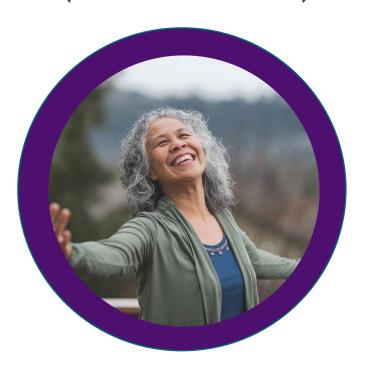
Older Boomers (1955 or Earlier)











Share of dollar sales:

2%

13%

16%

29%

18%

4%

Share of dollar change (+\$4 BILLION more produce dollars vs. year ago):

14%

70% of

-4%

30%

10%

20%



new dollars **J%**

0 70

Source: Circana, Integrated Fresh, Total U.S., Household Panel, 52 weeks ending 3/23/25

In Produce, Generational Shift Underway

Gen Z (1997 or after)



Spend More than Avg in:

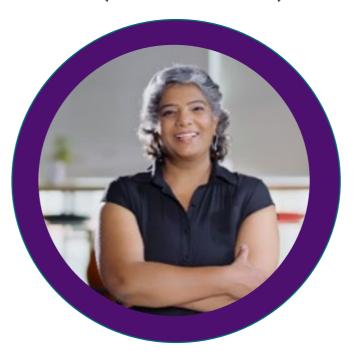
Young Millennials (1990-1996)



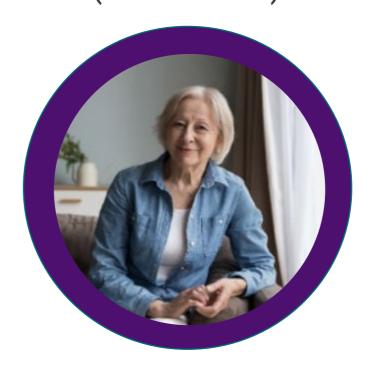
Older Millennials (1981-1989)



Gen X (1965-1980)



Younger Boomers (1956-1964)



Older Boomers (1955 or Earlier)



Limes

Mangoes **Kiwis** Limes **Fruit Party Trays**

Coconuts **Bok Choy Fruit Party Trays** Mangoes

Side Dish Kits Kale Salad-Blends

Radishes Artichokes Tangelos Pkg Mixed Veg

Radishes Pkg Mixed Veg Cherries Salads-Slaw

Younger Gens Increasing Spend in:

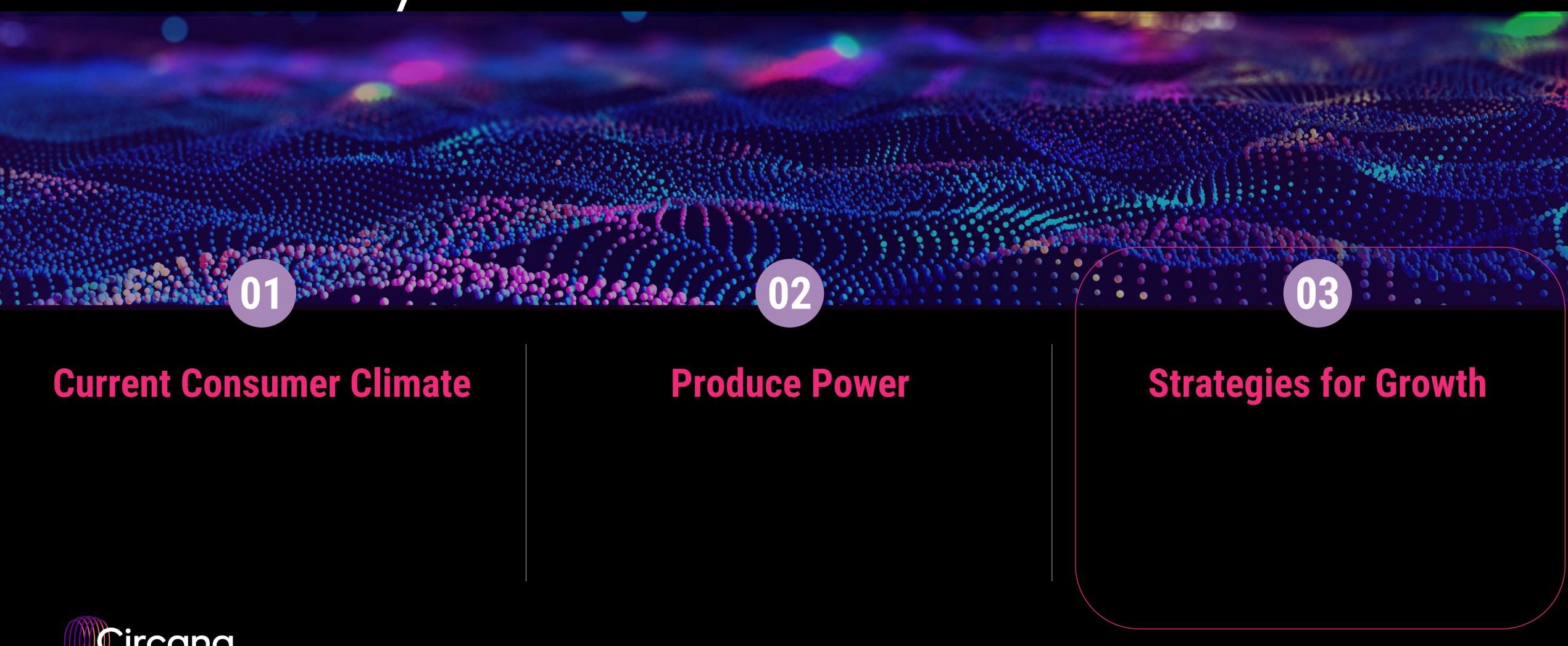
Berries +52.4% \$ vs YA

Avocadoes +53.5% \$ vs YA

Kiwis +22.1% \$ vs YA



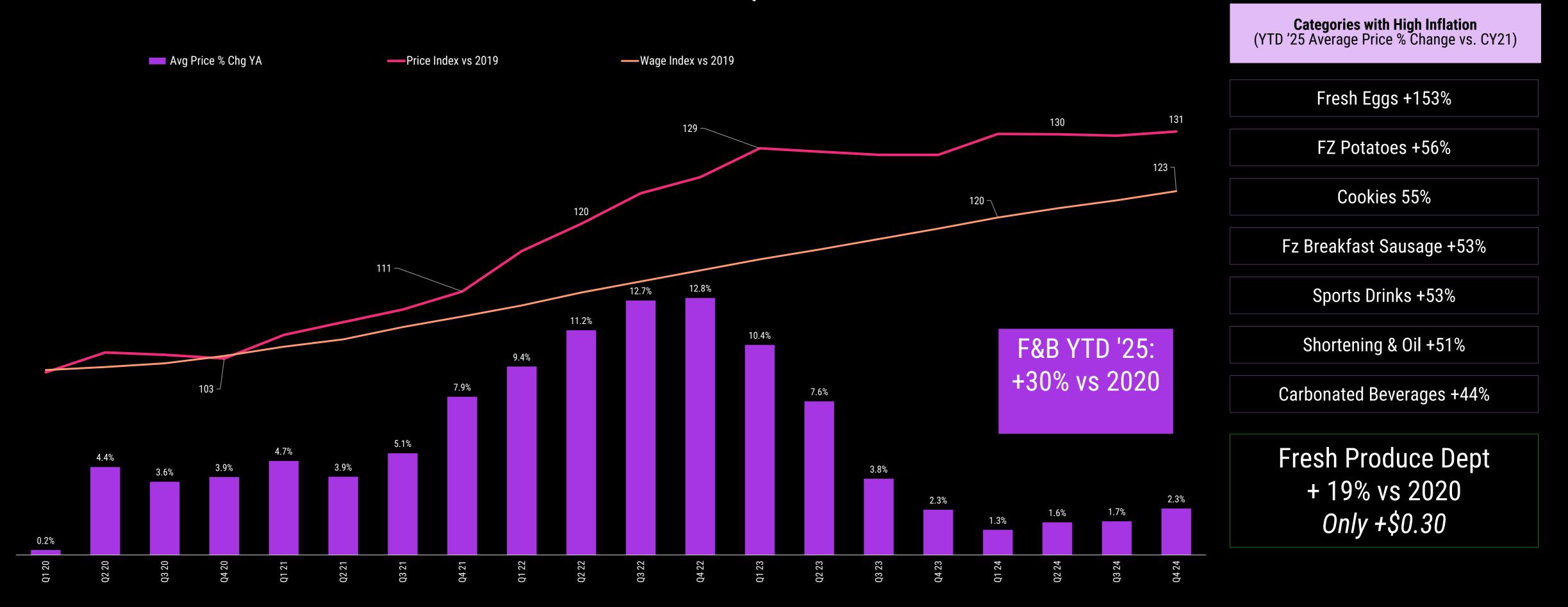
Fruit & Veggie Shopping Habits in the Affordability Era





Consumers are Facing 30% Higher Retail Prices – Yet, Produce is Affordable and Not Rising as Fast

F&B Price Realization Year-over-Year and Indexed to 2019, MULO+ with Conv.

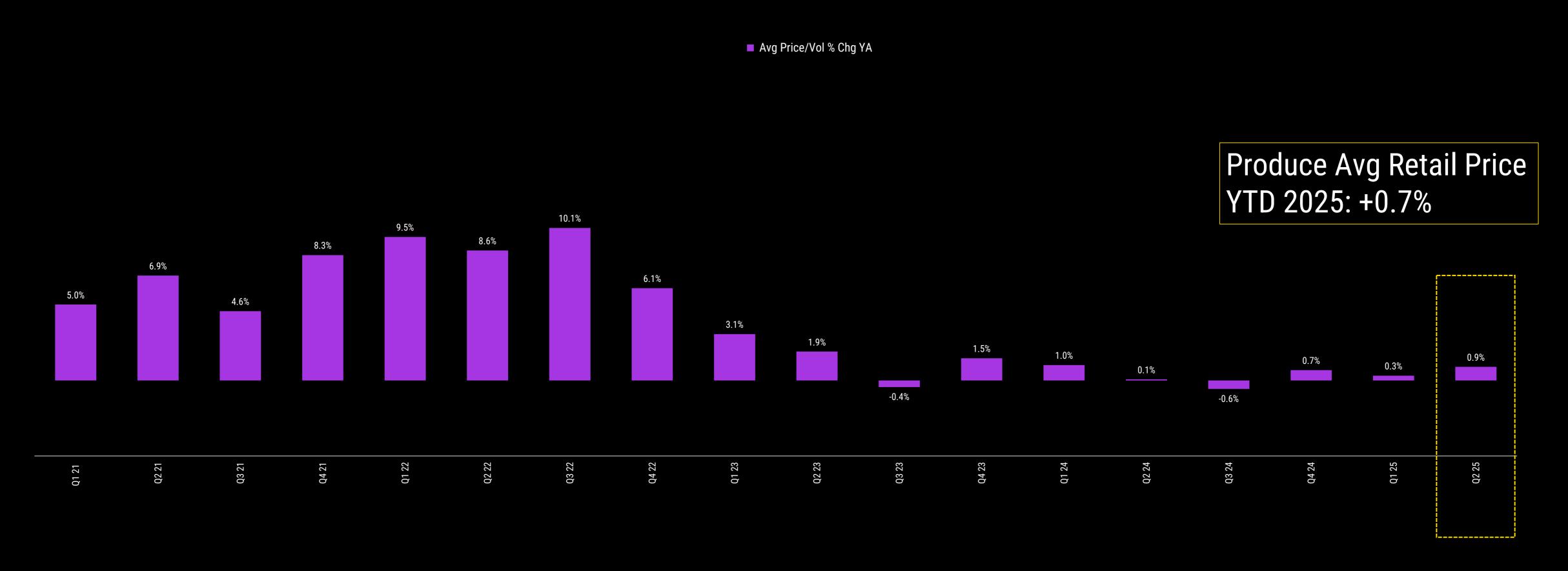






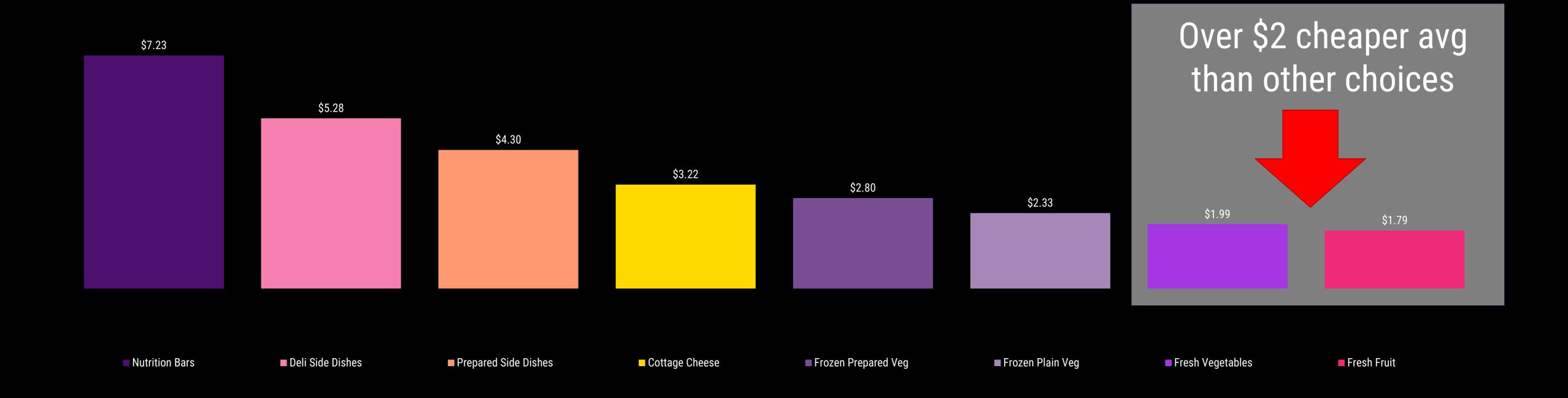
minimi

Total Produce avg retails have seen a slight increase in Q2 vs Q1 but are relatively *flat* YTD





Fresh Fruits & Vegetables bring value compared to other category choices



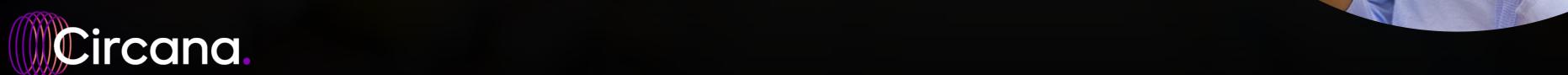




Dimensions of value: market beyond price

More than ever, driving demand must be multidimensional and anchored in consumer priorities.



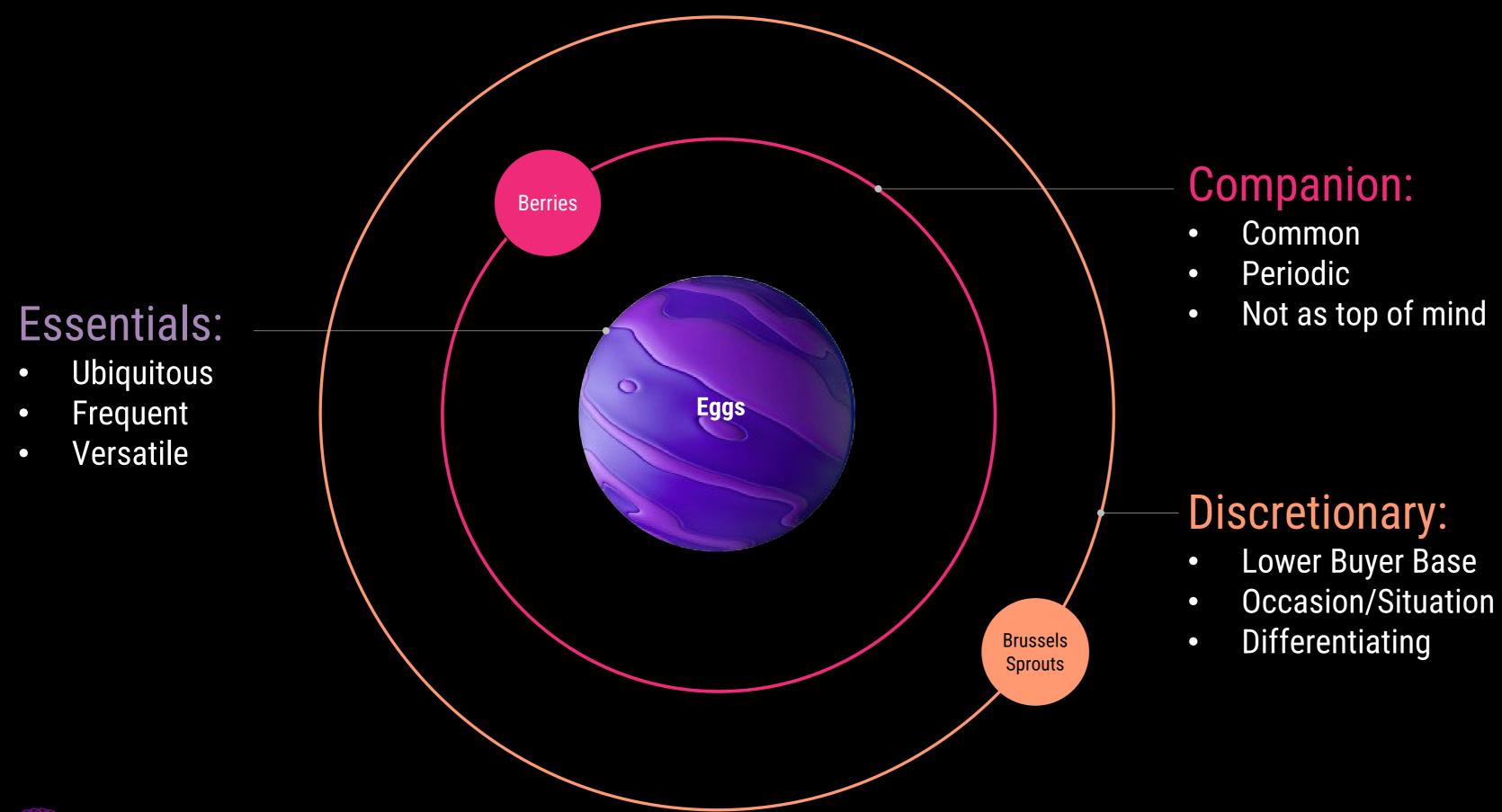


Source: FMI Dimensions of Value.

Circana, LLC | Proprietary and confidential



Understanding Gravitational Pull Unlocks New Strategies





Consumer's Spending is **Not Infinitely Expandable**



Basket Size has Plateaued



Increasing costs of essentials will ripple across all aisles

Fruit & Veggie Shopping Habits in the Affordability Era

PRACTICAL APPLICATIONS



Reframing the Value Story

From "too expensive" to "smart investment"

Stretch That Purchase
Educate on how best to use all parts
of produce items

Full Use = Full Flavor
Incorporate all parts of the plant in dishes and use call-outs to inform diners

Budget-friendly Hauls
Create a realistic grocery haul series

– show what you bought for X
amount, how you plan to use it and
recipes as you make each dish

\$10 = 3 Dishes

A handout showing how to stretch \$10 worth of produce across 3 days, tailored to the patient's condition



Use What's Trending to Boost the Whole Basket

Pair produce with what's *already* in the cart – or with other produce to maximize value & variety

Pair It With Signage

"Love grapes? Try roasting them with carrots." Use trending items to suggest creative, tasty pairings.

Hero + Support

Feature trending items as hero ingredients with support players: berry & balsamic-glazed brussels sprouts, mango-chickpea salad

"If You Like This, Try That'
Playful swaps like: 'Avocado toast on sweetpotato!' inspire creativity and produce pairing on social.

Build Confidence, Add More
Affirm trending item use, then suggest easy additions like banana or grated apple to build on success.



Rethink the Modern Household

Stay relevant to all households

Grab & Go = Real Life

Grab & go produce packs are perfect for real-life routines: Kid lunches, snacks for hybrid workers, post-gym refuel, quick bites for retirees

Nostalgia Meets Modern

Lean into nostalgic yet modern meals
like updated shepherd's pie with extra
veg or plant-forward sandwich builds

Fruit & Veggie Mood Boards
For life's moments (Sunday Scaries
Reset, Girls' Night In, Solo Cozy
Night) – produce becomes part of
lifestyle moments, not just health
goals.

Low Prep, High Satisfaction
Meet people where they are & create
simple wins with 1-pan meals with
minimal chopping or pre-cut produce
for "snack & serve" options



QUESTIONS & DISCUSSION







Fruitsandveggies.org

Your one-stop-shop for all things fruits & veggies





THANKYOUS

WE'RE SO HAPPY YOU'RE WITH US!



















