



# MANGO PERFORMANCE

Retail Scanner Data and Ad  
Tracking Trends

Q1 2017



# RETAIL SCANNER DATA

Q1 2017



# ABOUT THE N-PG DATA SET

- The data is provided by Nielsen-Perishables Group (N-PG)
- The data represents retail census sales data of total U.S. grocery store chains with more the \$2 million sales annually
- Data is captured in a universe called the Fresh Coverage Area (FCA) and includes approximately 18,000 stores nationwide
- Data is collected by week, by store, by item with 117 weeks in the active database
- Not included in the data set are small independent chains and alternative format retailers such as Whole Foods and Trader Joe's
- The data represents fruit items sold in the produce department including UPC, PLU and system-2 coded items



# DATA PARAMETERS

- Geography:
  - Total U.S.
  - Nine sub-regions
- Time Period:
  - Monthly and quarterly, compared to the same period in the prior year
- Products:
  - Mango sub-category, whole mango segment
- Measurement:
  - Volume is measured in units, one mango = one unit



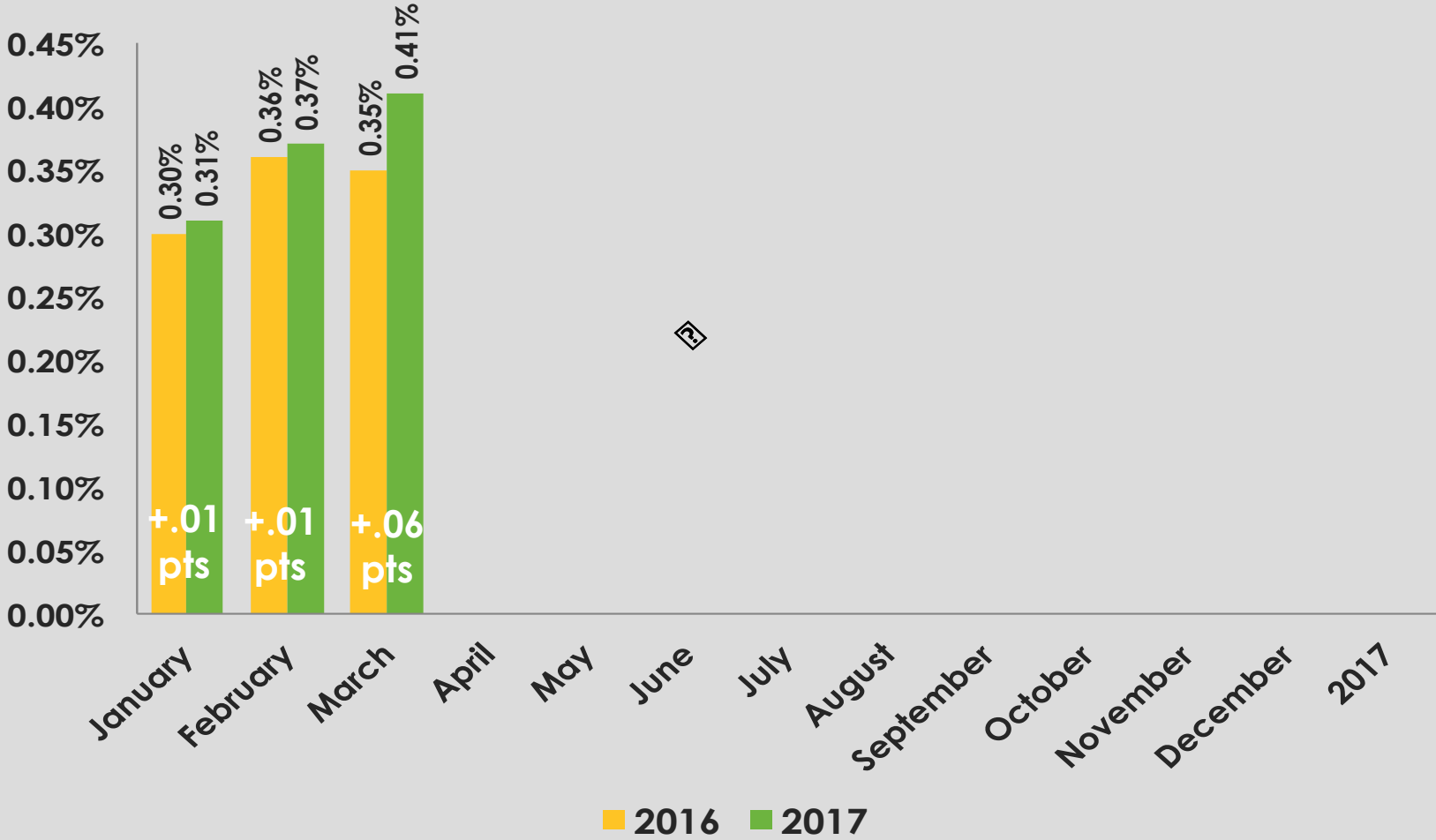
# EXECUTIVE SUMMARY

- Slow start to Q1, with strong results for February and March
  - 13% increase in volume per store per week for all of Q1
  - 3% decline in volume per store per week in January 2017
  - 9% increase in volume per store per week in February 2017
  - 30% increase in volume per store per week in March 2017
  - Average retail price decreased 5% in Q1
- Regional highlights
  - Volume per store per week increased in all sub-regions in Q1, except West South Central (-8%)
  - Largest Q1 increases were observed in the Pacific (+32%), Mountain (+27%), East South Central (+27%) and West North Central (+22%) sub-regions
  - All comparisons are to the same period on the prior year

# MANGO CONTRIBUTION TO PRODUCE DEPT. SALES



Mango Contribution to Produce Department Sales  
Total U.S., Whole Mangos, Monthly

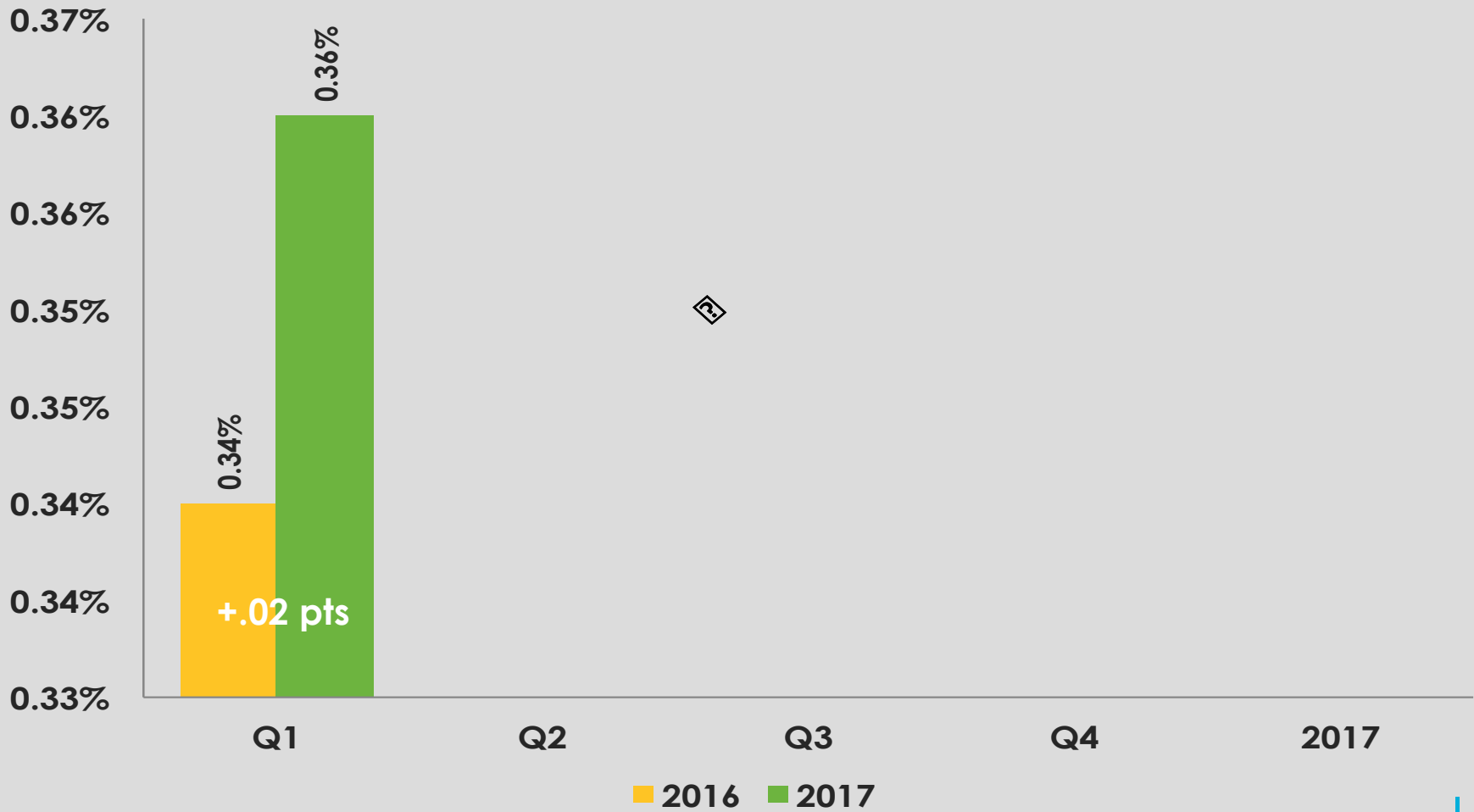


Source: Nielsen Perishables Group FreshFacts®

# MANGO CONTRIBUTION TO PRODUCE DEPT. SALES



Mango Contribution to Produce Department Sales  
Total U.S., Whole Mangos, Quarterly

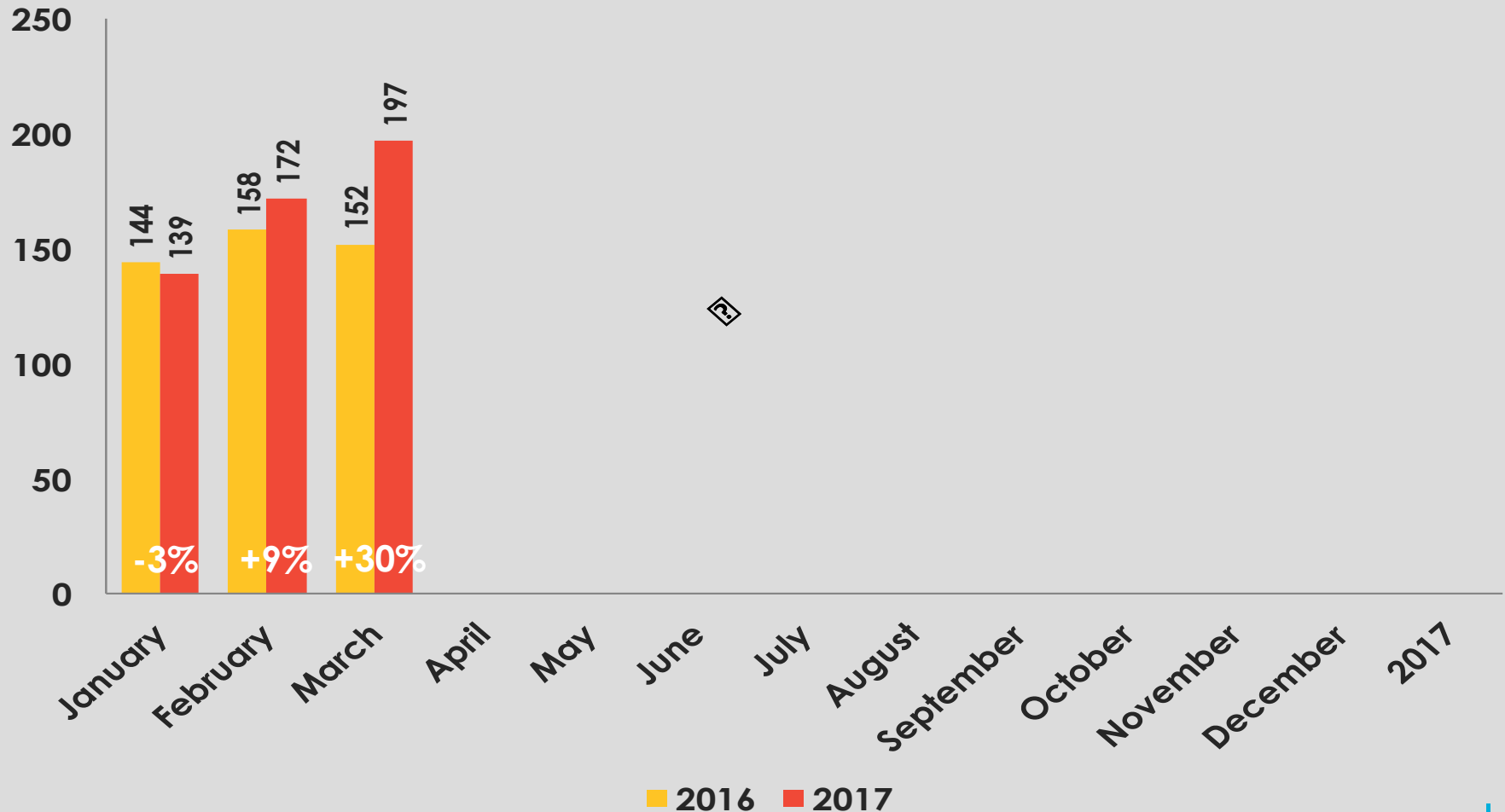


Source: Nielsen Perishables Group FreshFacts®

# MANGO AVG. VOLUME PER STORE PER WEEK



Mango Average Volume Per Store Per Week  
Total U.S., Whole, Monthly

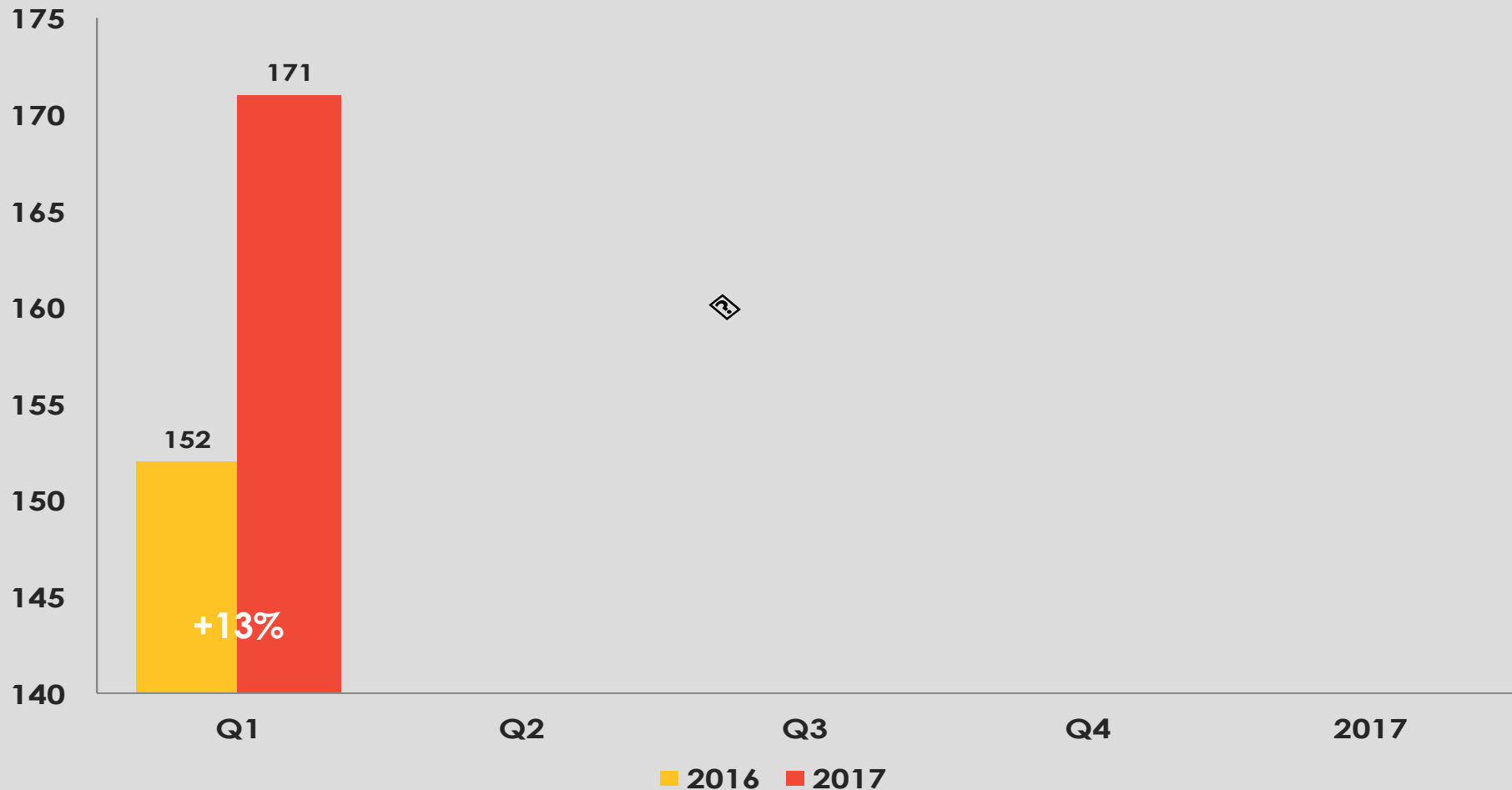




# MANGO AVG. VOLUME PER STORE PER WEEK



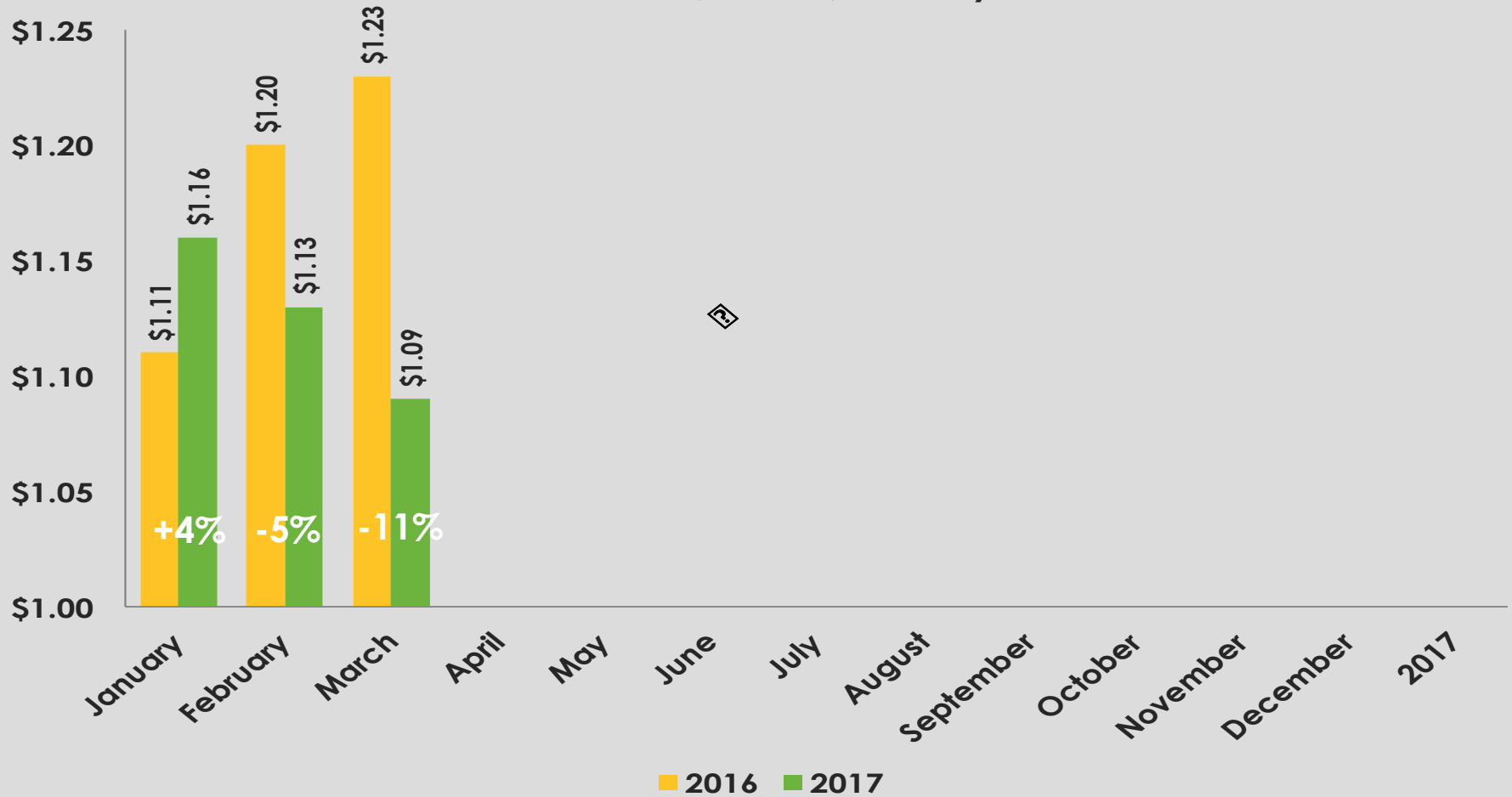
Mango Average Volume Per Store Per Week  
Total U.S., Whole, Quarterly





# MANGO AVG. RETAIL PRICE

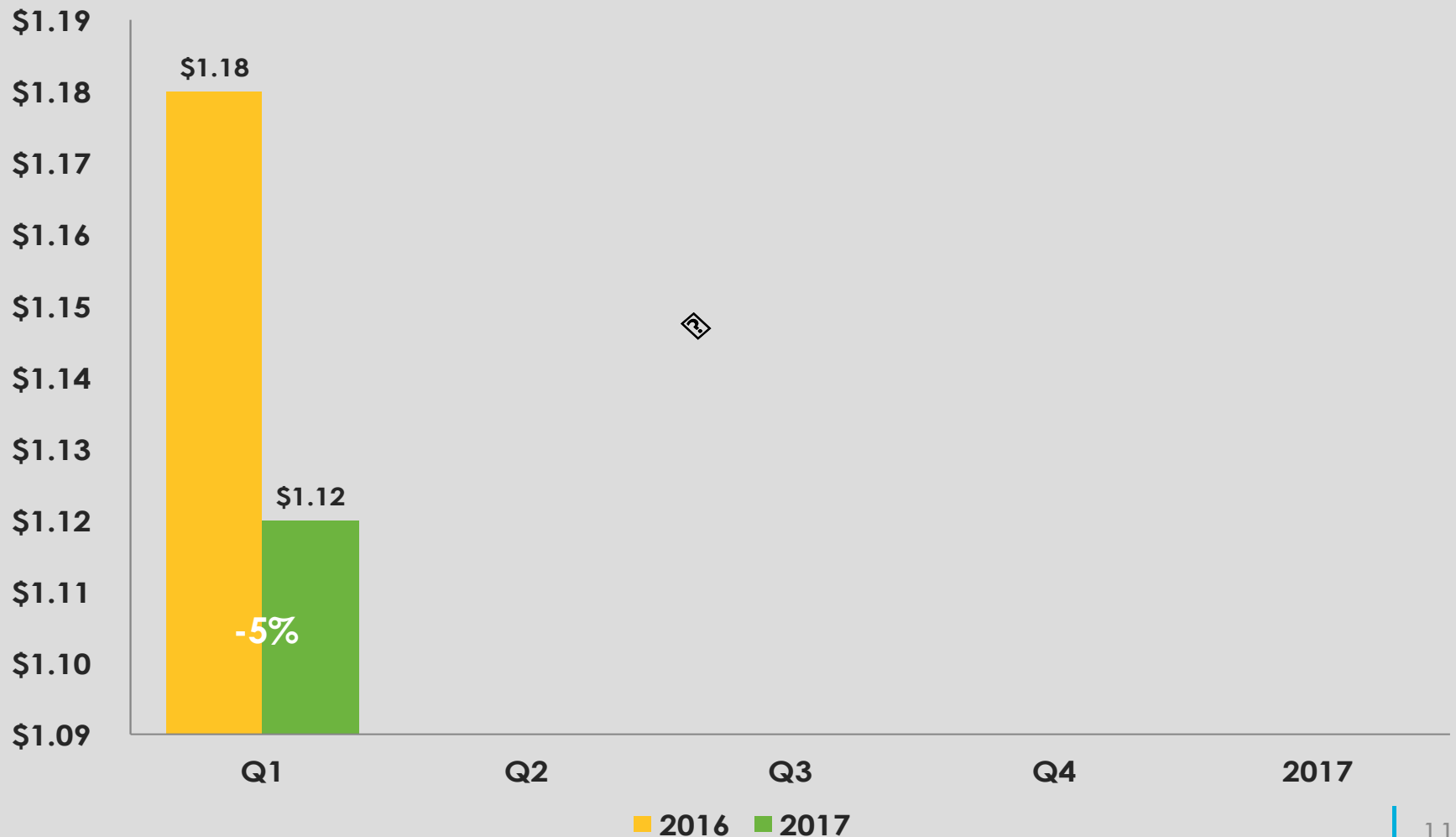
Mango Average Retail Price  
Total U.S., Whole, Monthly





# MANGO AVG. RETAIL PRICE

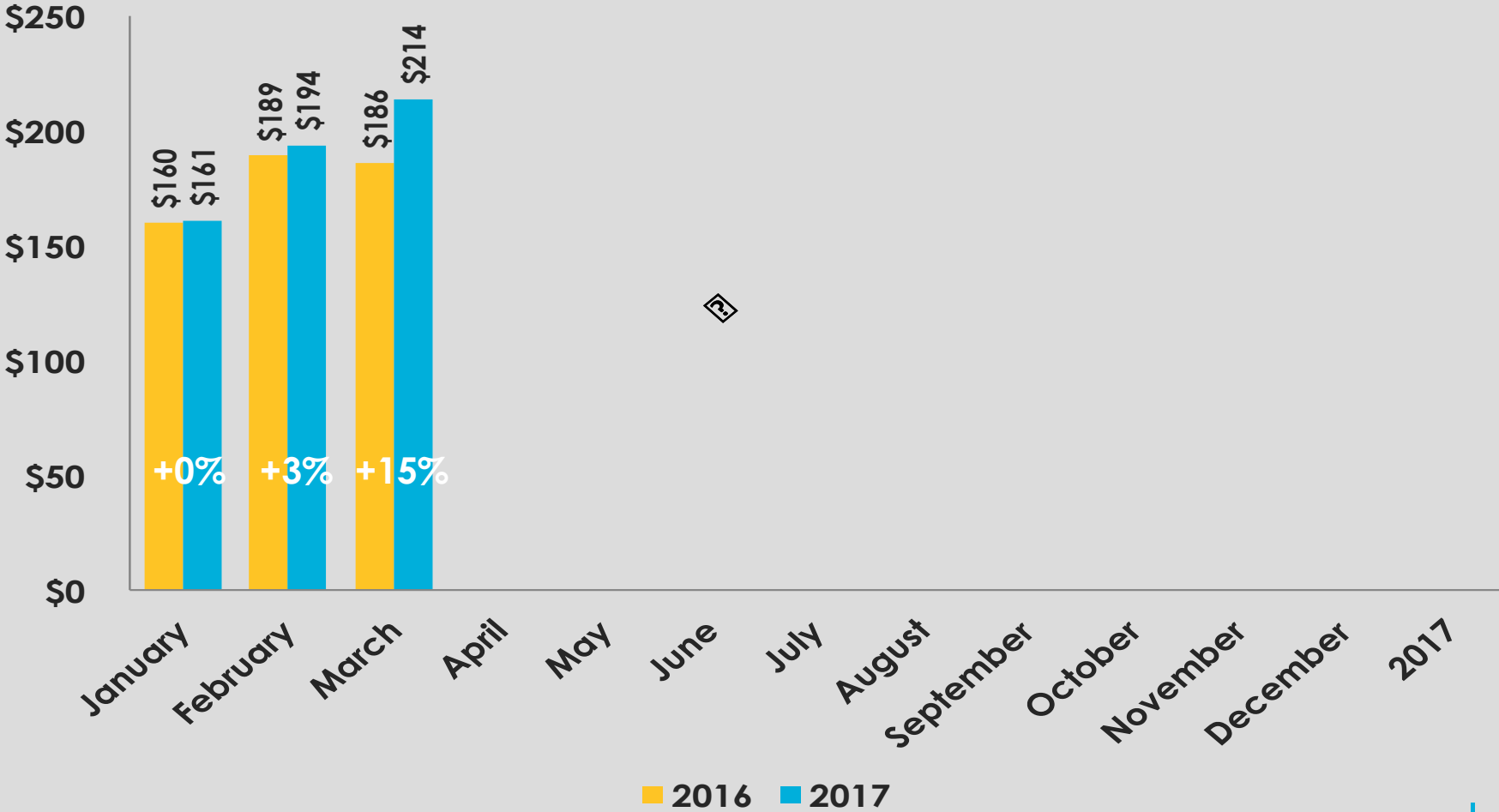
Mango Average Retail Price  
Total U.S., Whole, Quarterly



# MANGO AVG. DOLLARS PER STORE PER WEEK



Mango Average Dollars Per Store Per Week  
Total U.S., Whole, Monthly

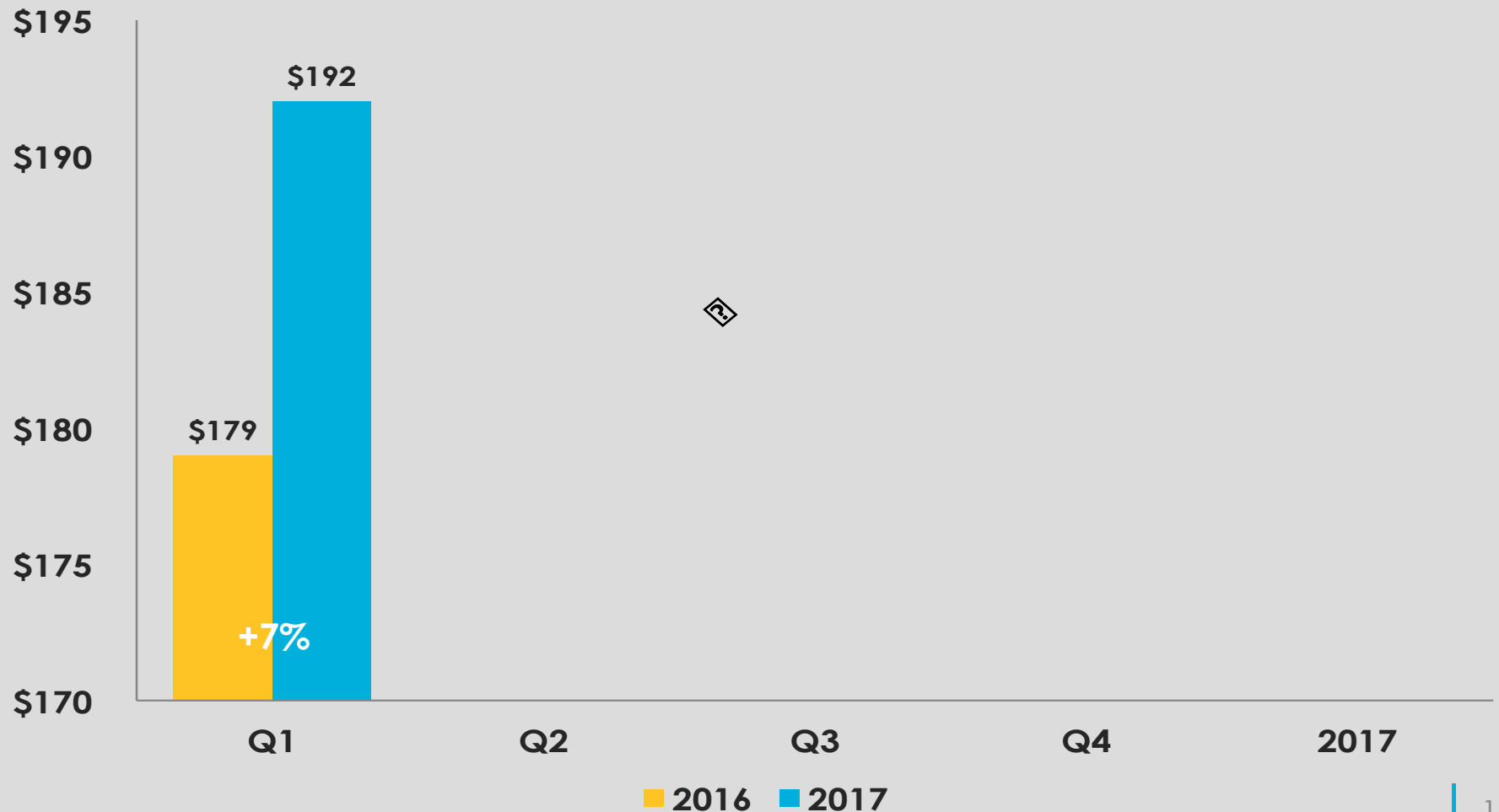


Source: Nielsen Perishables Group FreshFacts®

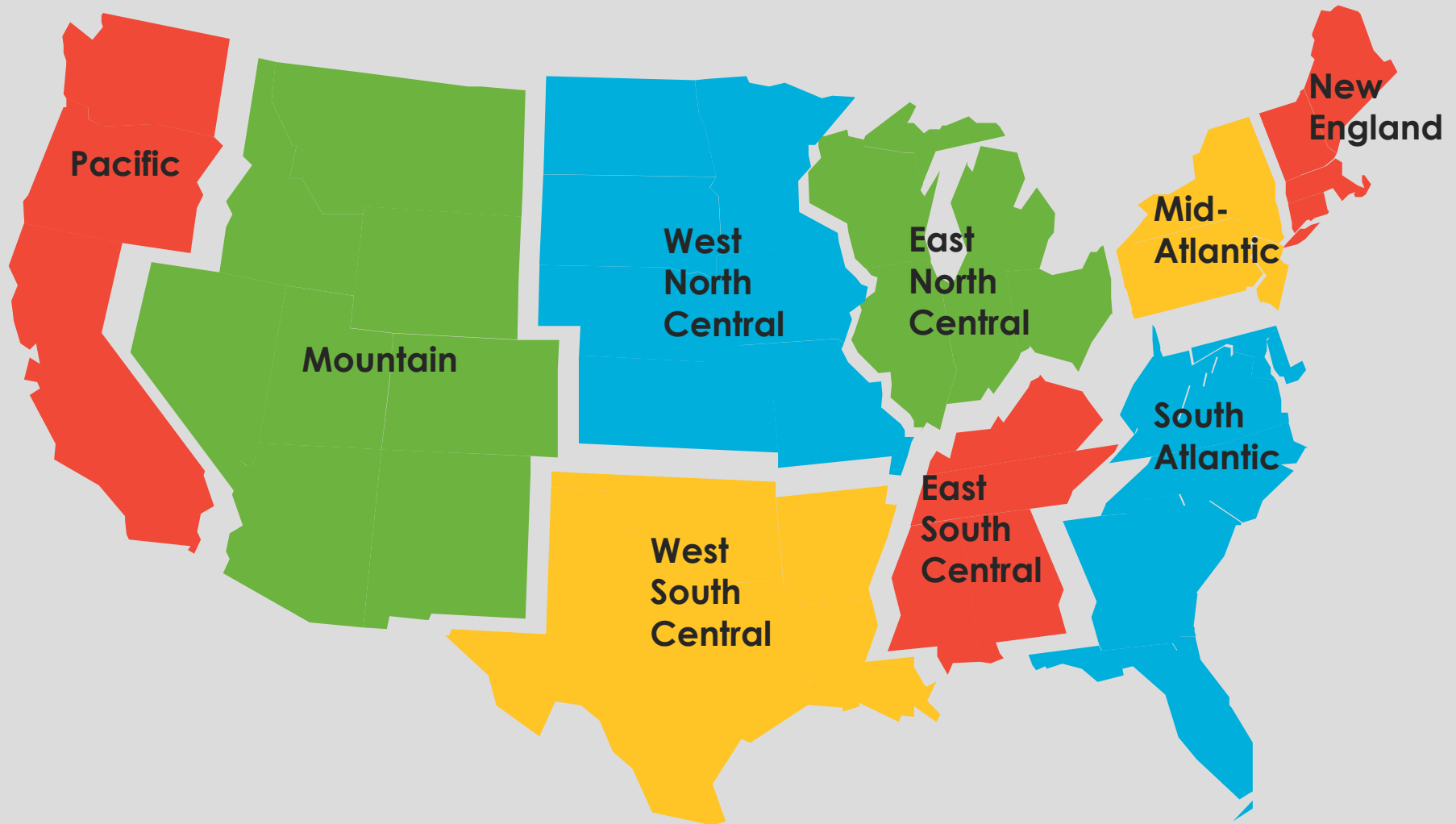
# MANGO AVG. DOLLARS PER STORE PER WEEK



Mango Average Dollars Per Store Per Week  
Total U.S., Whole, Quarterly



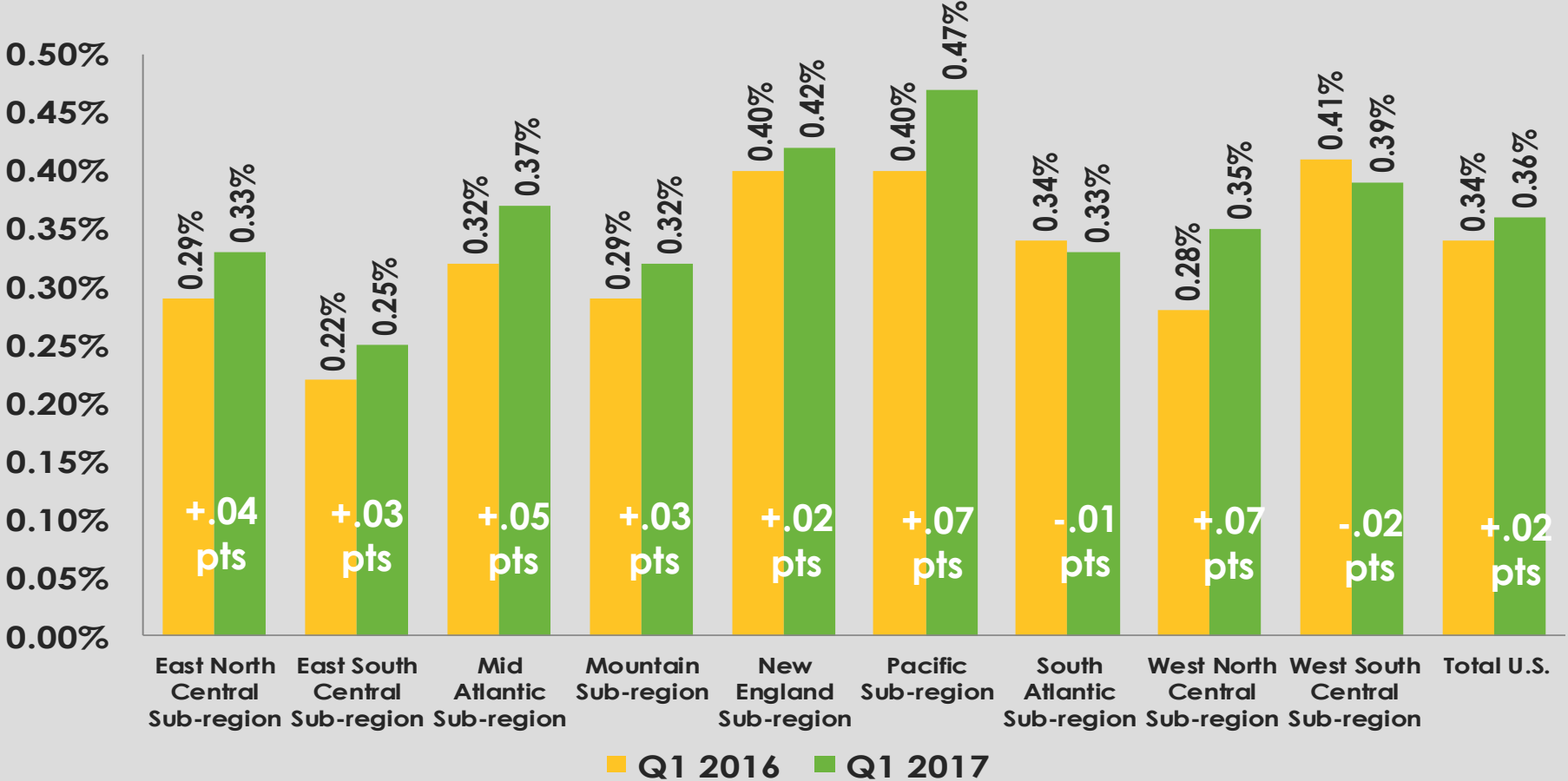
# MAP OF SUB-REGIONS



# MANGO CONTRIBUTION TO DEPT. SALES BY SUB-REGION



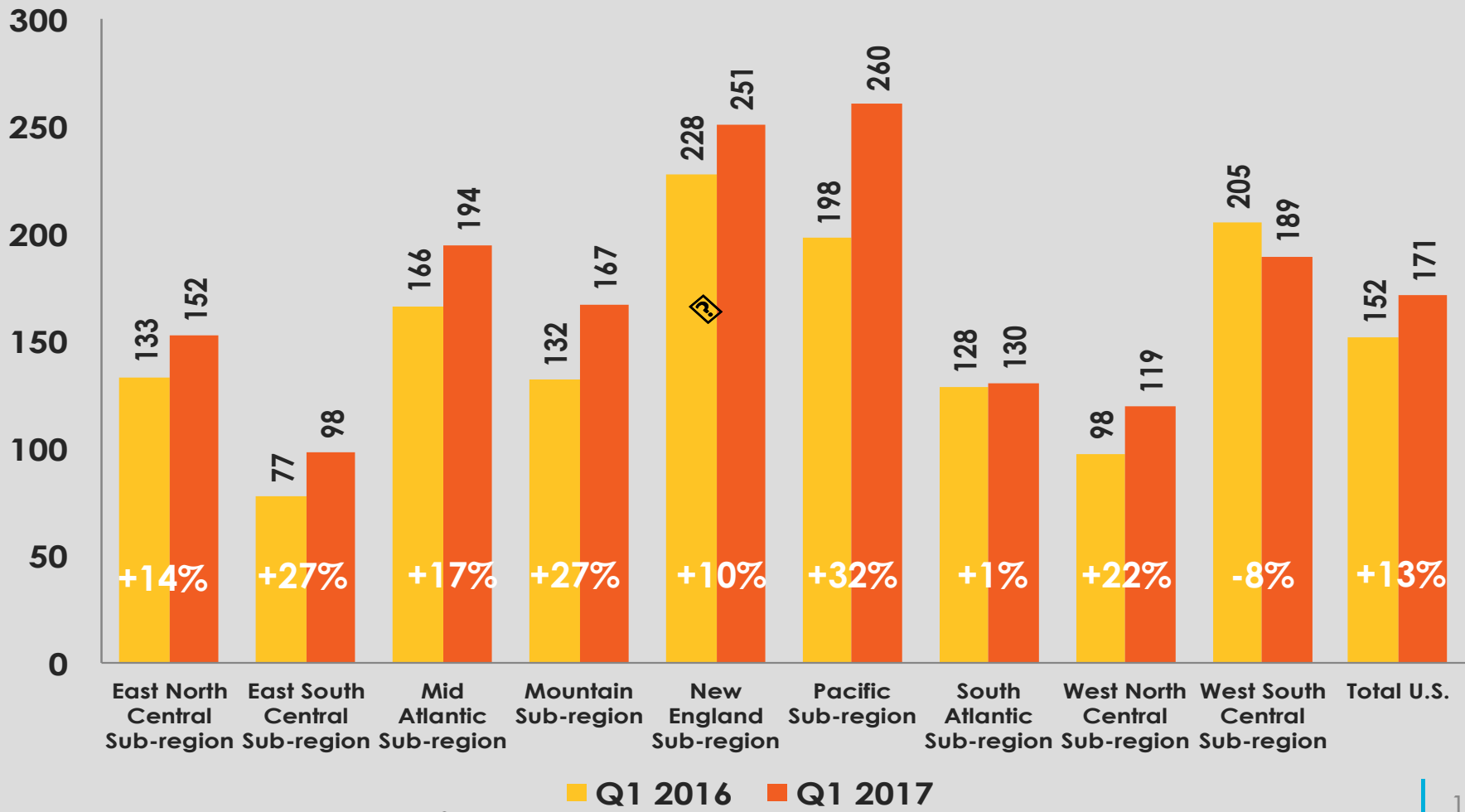
Mango Contribution to Produce Department Sales  
By Sub-Region, Whole Mangos



Source: Nielsen Perishables Group FreshFacts®

# MANGO AVG. VOLUME PER STORE PER WEEK BY SUB-REGION

Mango Average Volume Per Store Per Week By Sub-Region, Whole Mangos



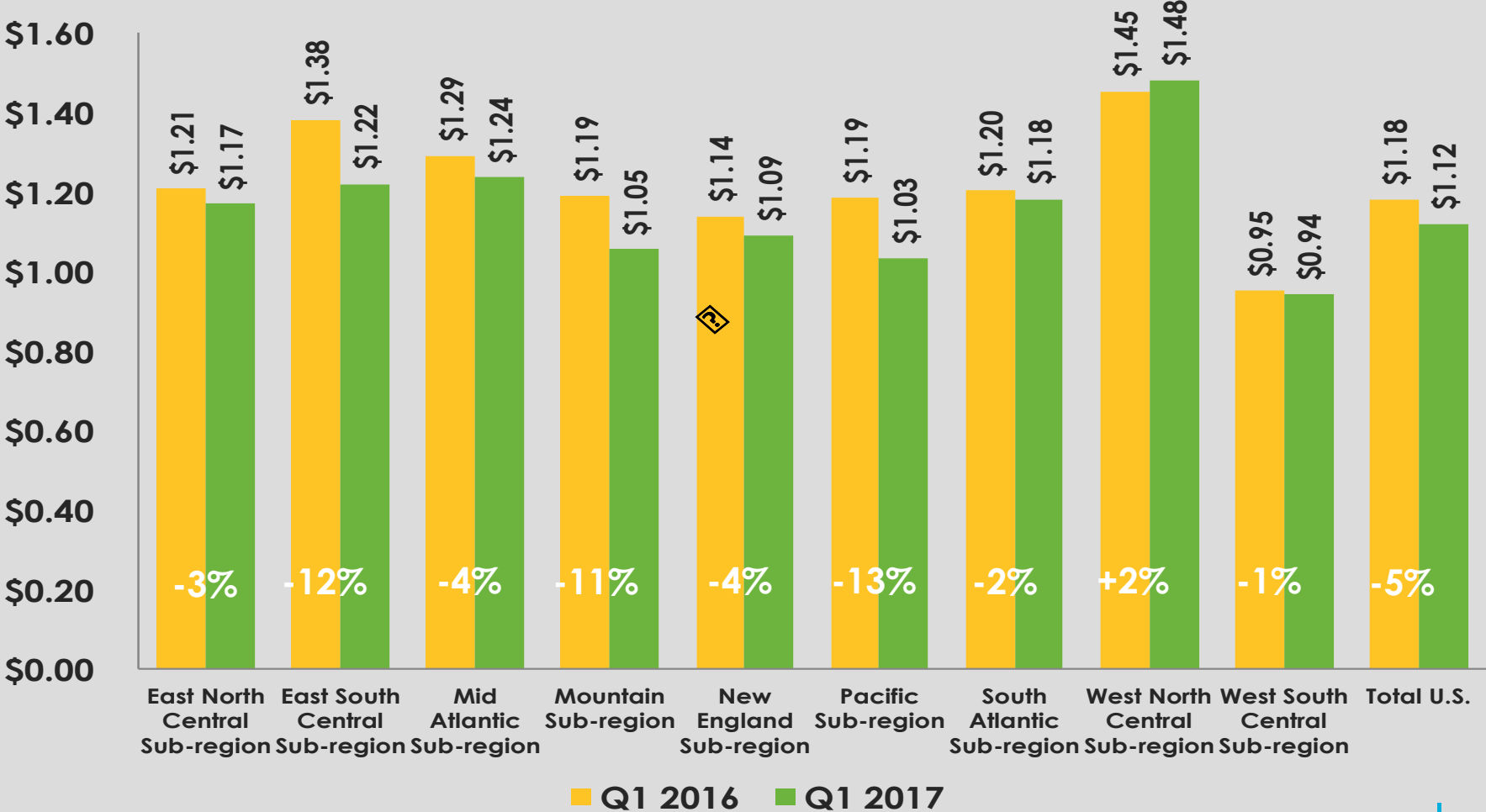
Source: Nielsen Perishables Group FreshFacts®



# MANGO AVG. RETAIL PRICE BY SUB-REGION



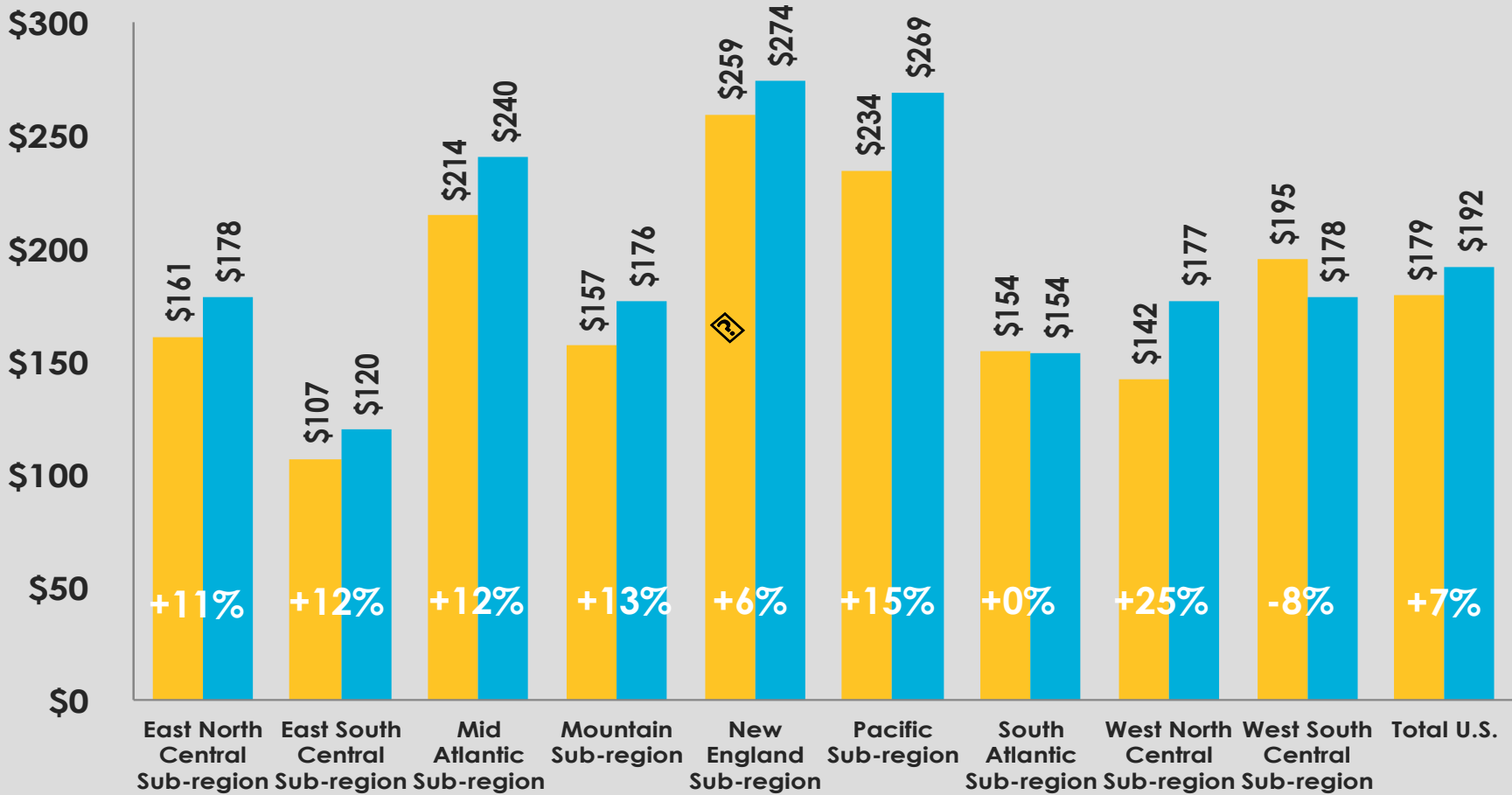
Mango Average Retail Price By Sub-Region, Whole Mangos



Source: Nielsen Perishables Group FreshFacts®

# MANGO AVG. SALES PER STORE PER WEEK BY SUB-REGION

Mango Average Sales Per Store Per Week  
By Sub-Region, Whole Mangos



■ Q1 2016 ■ Q1 2017

Source: Nielsen Perishables Group FreshFacts®



# AD TRACKING DATA

Q1 2017

# AD TRACKING METHODOLOGY



- Data is pulled from the USDA-AMS Market News portal retail report
- The USDA Retail Report is based on a weekly survey of 500 retailers comprising more than 29,000 individual stores with online weekly advertised features
- The information represents advertised prices at major retail supermarket outlets
- Ad frequency follows a seasonal curve and responds to market and volume variations
- Usually, when we see a big difference in the year to year ad frequency trend, it can be related directly to mango volume and price at that time
- Advertising decisions are made weeks or even months in advance, so good crop information is critical



# EXECUTIVE SUMMARY

- All comparisons are to the same period in prior year
- 2% decline in stores on ad in January 2017
- 28% increase in stores on ad in February 2017
- 73% increase in stores on ad in March 2017
- 29% increase in stores on ad for Q1 2017



# JANUARY 2017 WEEKLY ADS

Week Ending	Organic Y/N	Unit	2016 Number of Stores on Ad	2016 Average Weighted Ad Price	2017 Number of Stores on Ad	2017 Average Weighted Ad Price	Store Count % Change	Ad Price % Change
1/6/17		each	6,070	0.95	7,157	1.11	18%	17%
1/6/17		per pound	24	1.99	35	3.15	46%	58%
1/6/17	Y	each	74	2	653	1.56	782%	-22%
1/13/17		each	6,527	1.11	5,984	0.97	-8%	-13%
1/13/17		per pound	30	2.94	64	3.18	113%	8%
1/13/17	Y	each	420	1.85	670	1.85	60%	0%
1/20/17		each	6,088	1.02	5,269	1.05	-13%	3%
1/20/17		per pound	51	2.52	61	2.99	20%	19%
1/20/17	Y	each	466	1.86	692	1.4	48%	-25%
1/27/17		each	7,190	1.13	6,017	1.06	-16%	-6%
1/27/17		per pound	85	2.15	3	2.49	-96%	16%
1/27/17	Y	each	509	1.92	269	1.6	-47%	-17%
<b>Totals</b>	<b>All</b>	<b>All</b>	<b>27,534</b>		<b>26,874</b>		<b>-2%</b>	



# FEBRUARY 2017 WEEKLY ADS

Week Ending	Organic Y/N	Unit	2016 Number of Stores on Ad	2016 Average Weighted Ad Price	2017 Number of Stores on Ad	2017 Average Weighted Ad Price	Store Count % Change	Ad Price % Change
2/3/17		each	4,097	1.25	5,037	0.99	23%	-21%
2/3/17		per pound	64	2.97	61	3.21	-5%	8%
2/3/17	Y	each	673	1.79	884	1.47	31%	-18%
2/10/17		each	3,503	1.22	5,024	1.07	43%	-12%
2/10/17		per pound	61	3.21	61	3.21	0%	0%
2/10/17	Y	each	1,090	1.91	934	1.47	-14%	-23%
2/17/17		each	5,030	1.16	6,201	0.96	23%	-17%
2/17/17		per pound	37	2.91	27	3.49	-27%	20%
2/17/17	Y	each	924	1.78	906	1.75	-2%	-2%
2/24/17		each	4,406	1.22	6,118	1.06	39%	-13%
2/24/17		per pound	63	3.14	61	3.21	-3%	2%
2/24/17	Y	each	294	1.67	647	1.53	120%	-8%
<b>Totals</b>	<b>All</b>	<b>All</b>	<b>20,242</b>		<b>25,961</b>		<b>28%</b>	



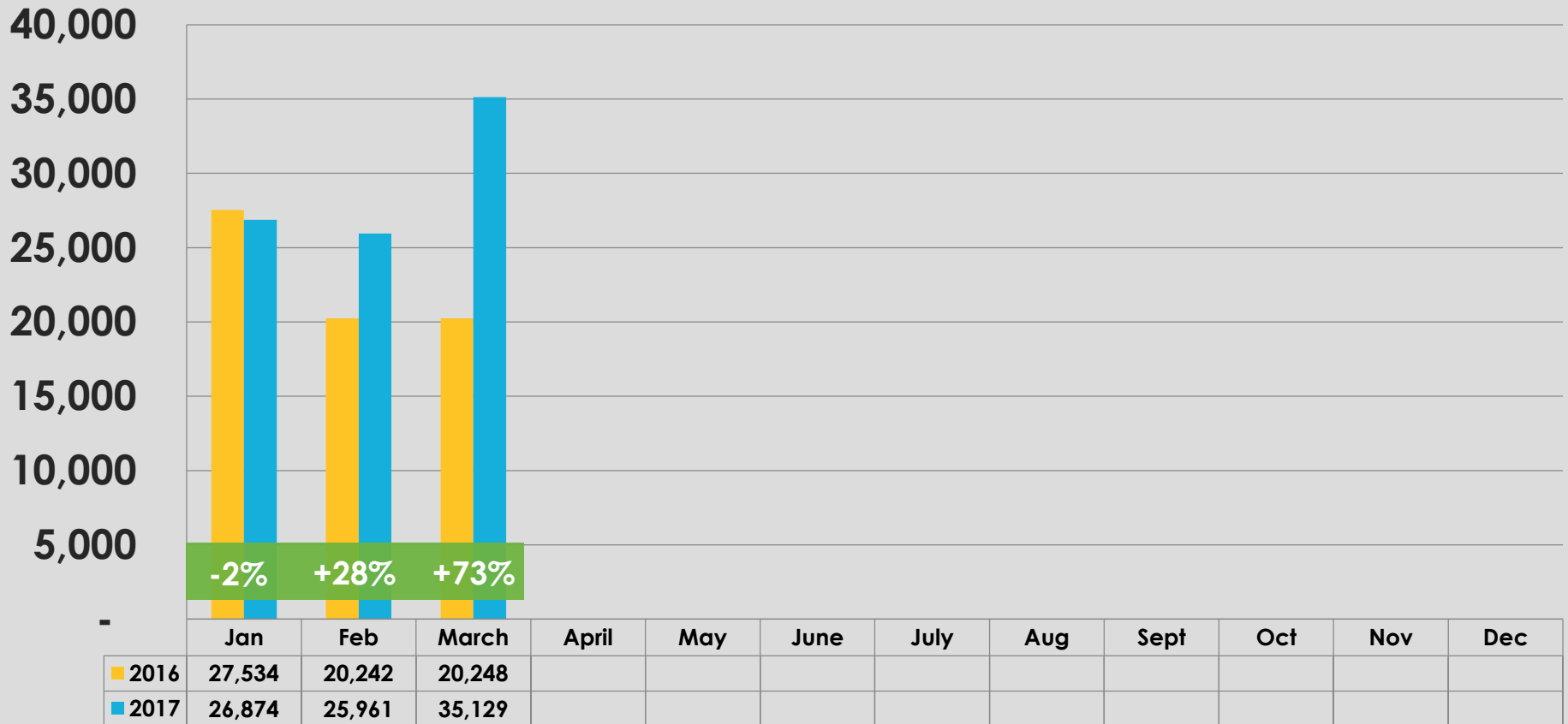
# MARCH 2017 WEEKLY ADS

Week Ending	Organic Y/N	Unit	2016 Number of Stores on Ad	2016 Average Weighted Ad Price	2017 Number of Stores on Ad	2017 Average Weighted Ad Price	Store Count % Change	Ad Price % Change
3/3/17		each	5,745	1.23	6,100	1.06	6%	-14%
3/3/17		per pound	64	3.18	27	3.49	-58%	10%
3/3/17	Y	each	539	1.58	533	1.45	-1%	-8%
3/10/17		each	3,006	1.15	3,888	1.04	29%	-10%
3/10/17		per pound	34	2.99	66	3.01	94%	1%
3/10/17	Y	each	844	1.86	573	1.51	-32%	-19%
3/17/17		each	3,785	1.3	4,093	0.88	8%	-32%
3/17/17		per pound	39	2.78	60	2.29	54%	-18%
3/17/17	Y	each	170	1.14	728	1.61	328%	41%
3/24/17		each	1,556	1.16	7,220	1.05	364%	-9%
3/24/17	Y	each			510	1.44		
3/24/17	Y	per pound			57	1.5		
3/31/17		each	4,164	1.01	10,139	1.06	143%	5%
3/31/17		per pound	3	1.99	47	2.48	1467%	25%
3/31/17	Y	each	299	1.27	1,088	1.22	264%	-4%
<b>Totals</b>	<b>All</b>	<b>All</b>	<b>20,248</b>		<b>35,129</b>		<b>73%</b>	



# 2017 MONTHLY NUMBER OF STORES ON AD

## 2017 Monthly Number of Stores on Ad



87,964 stores on ad from January to March 2017 compared to 68,024 on ad during this period in 2016, which is a 29% increase

