



# MANGO PERFORMANCE

Retail Scanner Data and Ad  
Tracking Trends

Q4 2016



# RETAIL SCANNER DATA

Q4 2016



# 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



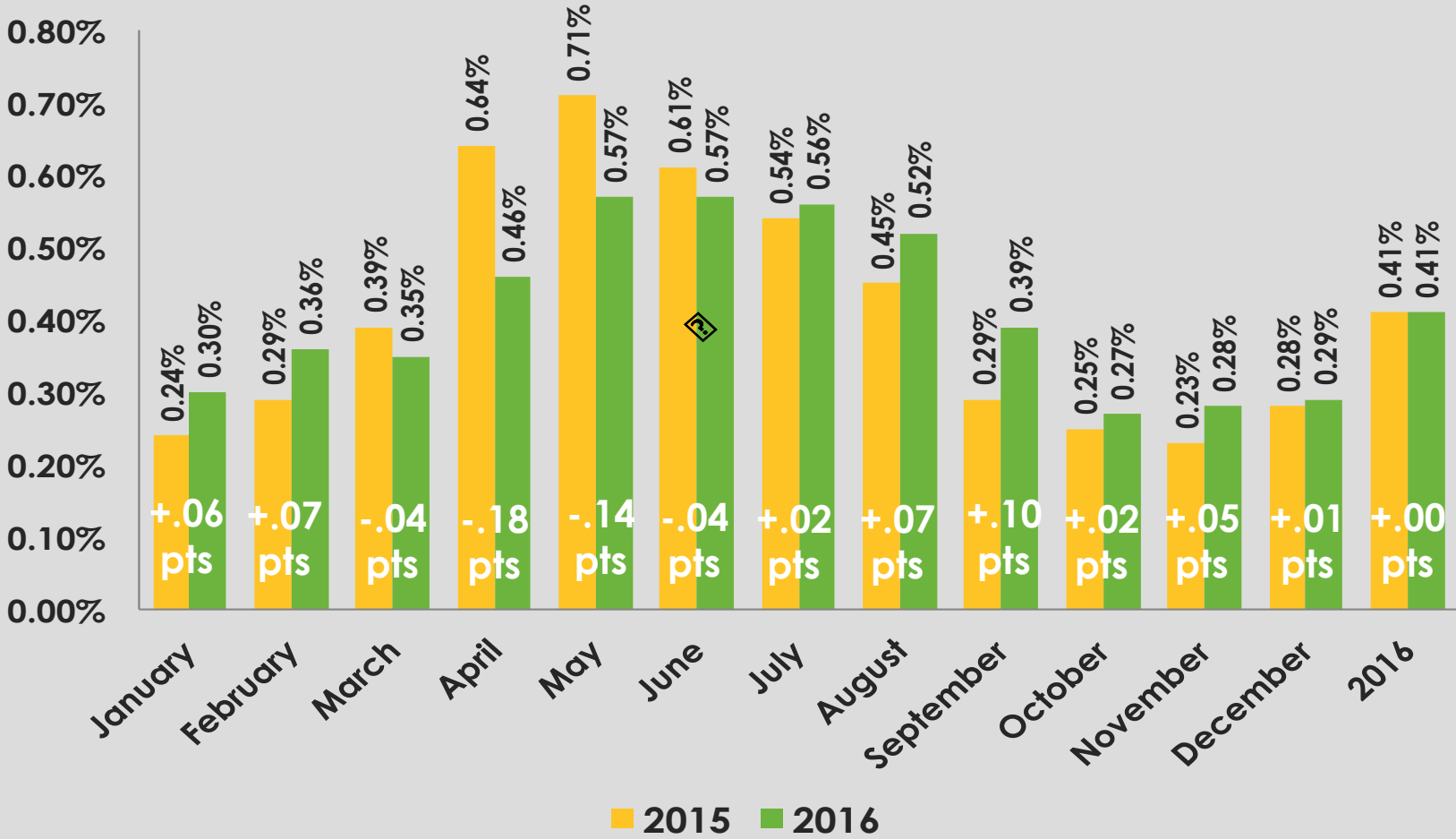
# EXECUTIVE SUMMARY

- Consistent supplies contributed to strong Q4 results
  - 30% increase in volume per store per week for all of Q4
  - 51% increase in volume per store per week in October 2016
  - 57% increase in volume per store per week in November 2016
  - 5% increase in volume per store per week in December 2016
  - 7% increase in volume per store per week for all of 2016
  - Average retail price decreased 15% in Q4
- Regional highlights
  - Volume per store per week increased in all 9 sub-regions in Q4
  - Largest Q4 increases were observed in the New England (+66%), Mid Atlantic (+45%), East North Central (+40%) and Mountain (+39%) 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

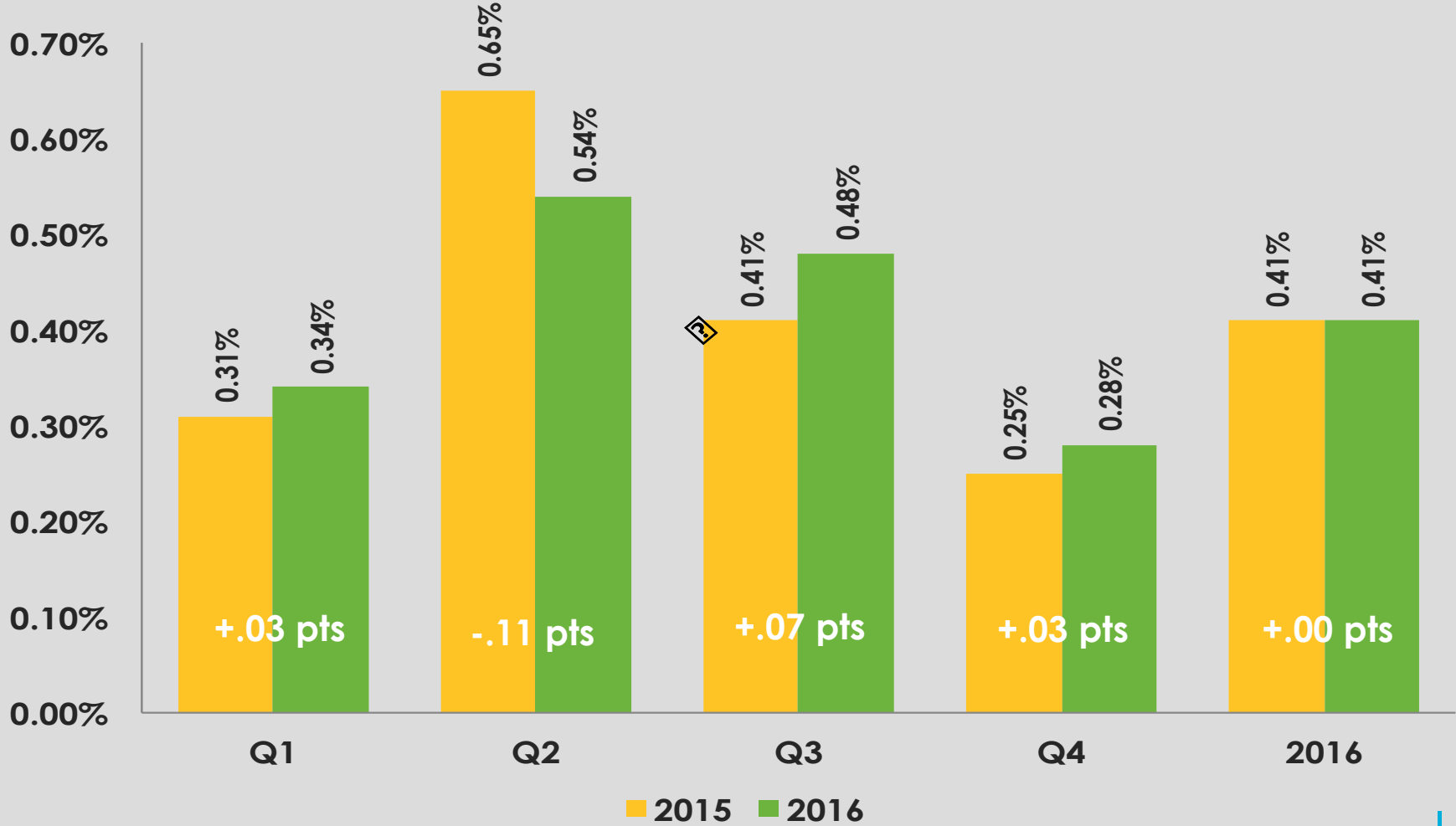


Source: Nielsen Perishables Group FreshFacts®

# MANGO CONTRIBUTION TO PRODUCE DEPT. SALES



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

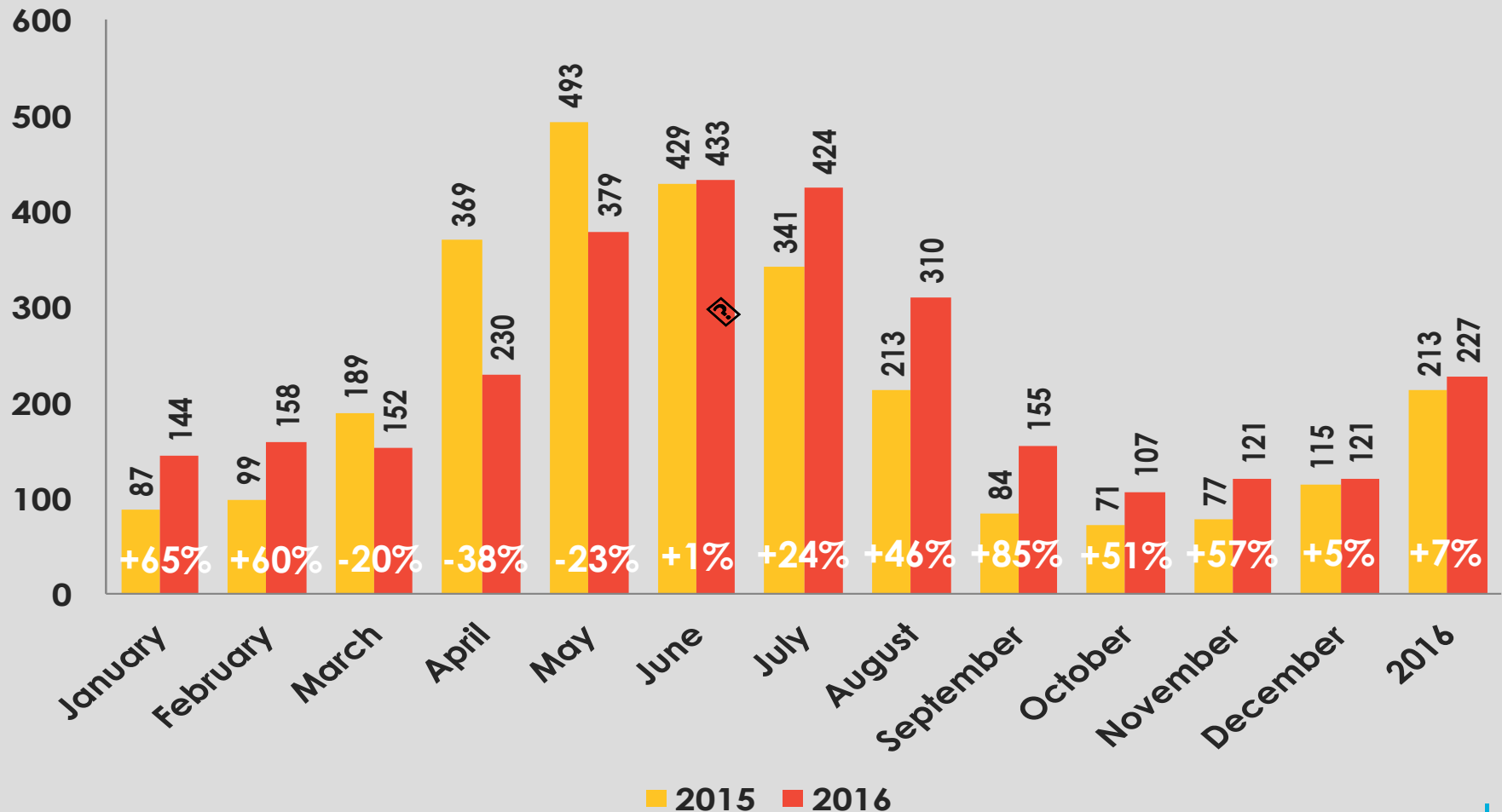


Source: Nielsen Perishables Group FreshFacts®

# MANGO AVG. VOLUME PER STORE PER WEEK



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



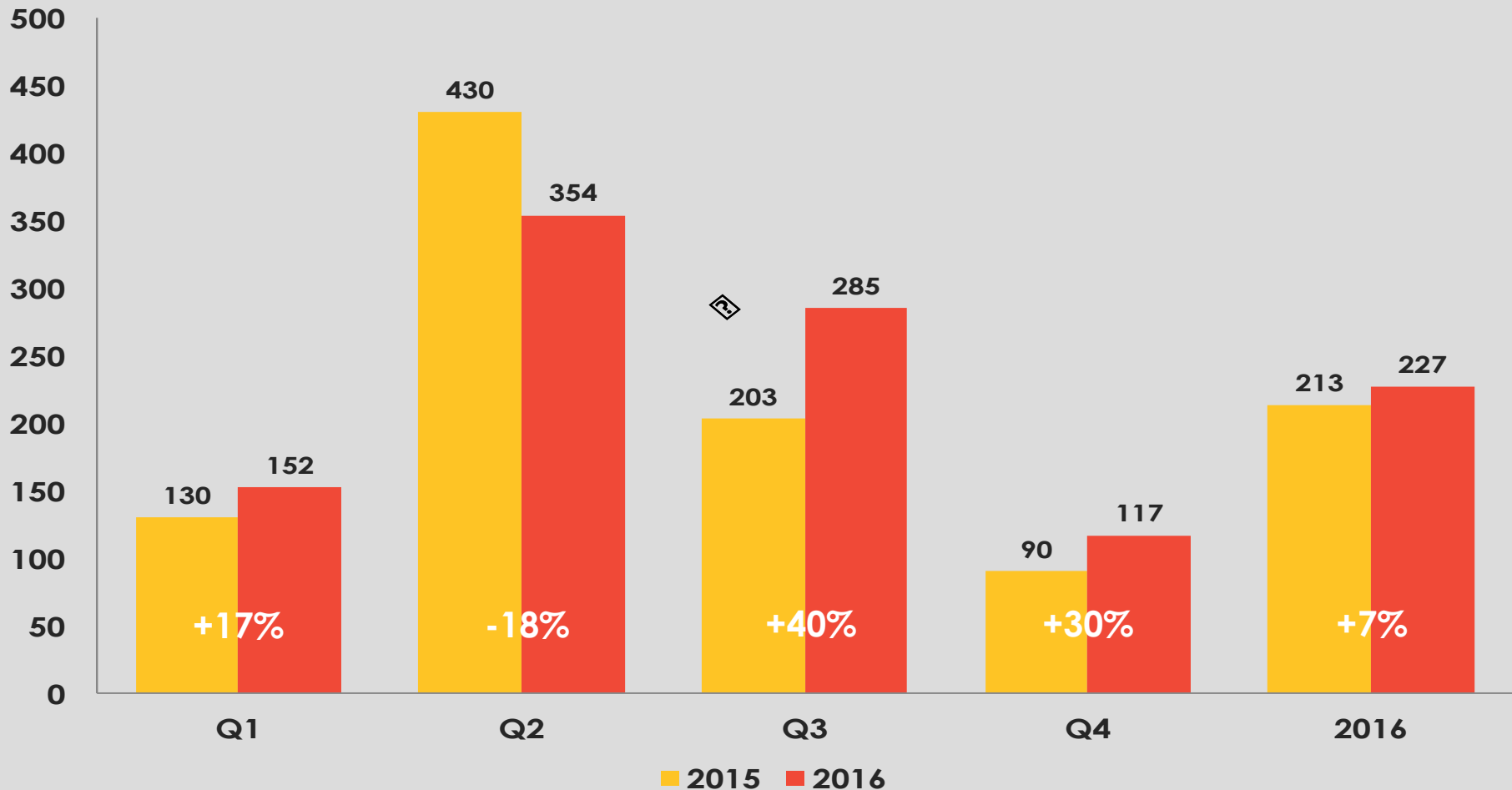
Source: Nielsen Perishables Group FreshFacts®



# MANGO AVG. VOLUME PER STORE PER WEEK



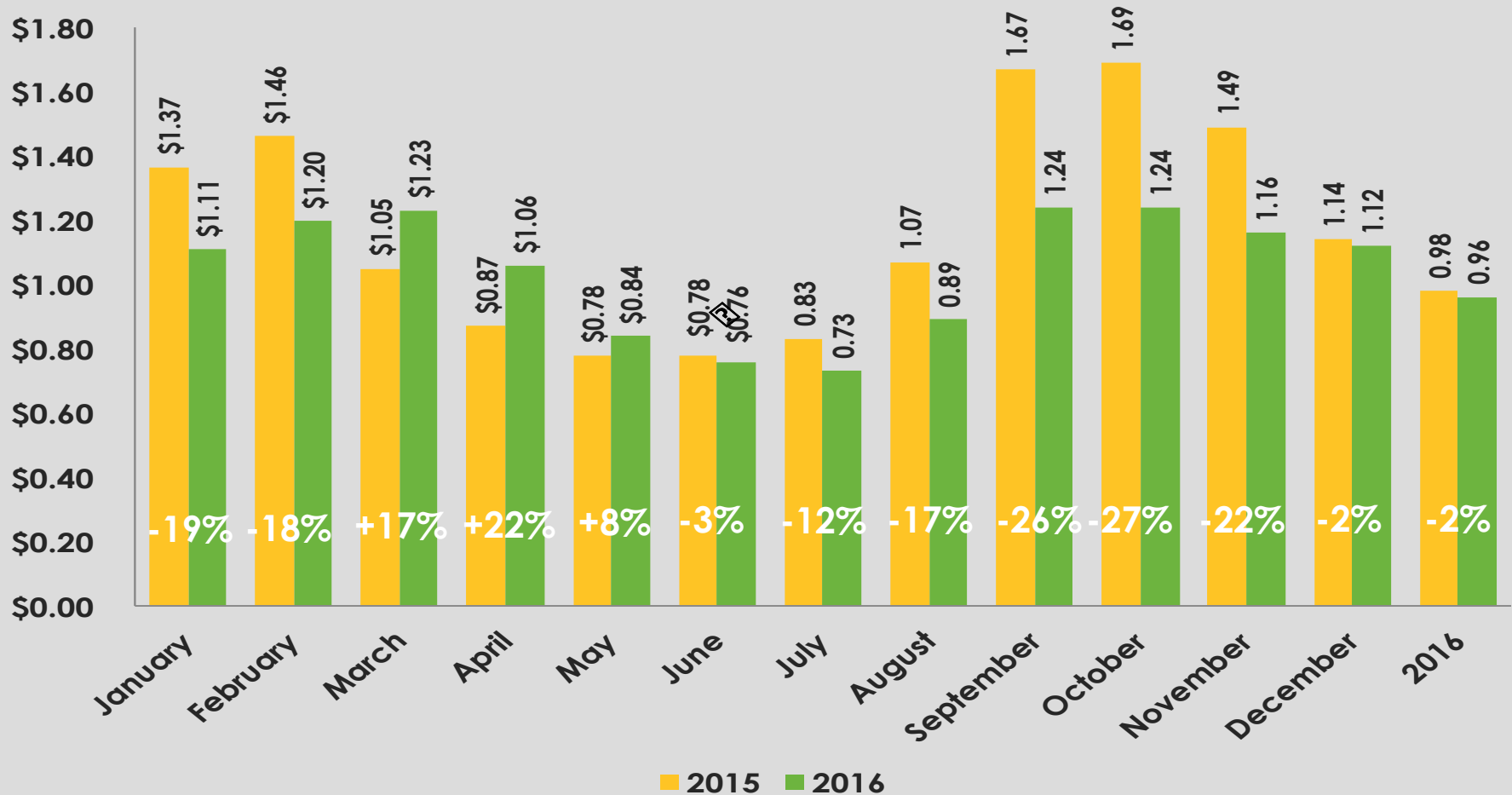
Mango Average Volume Per Store Per Week  
Total U.S., Whole, Quarterly





# MANGO AVG. RETAIL PRICE

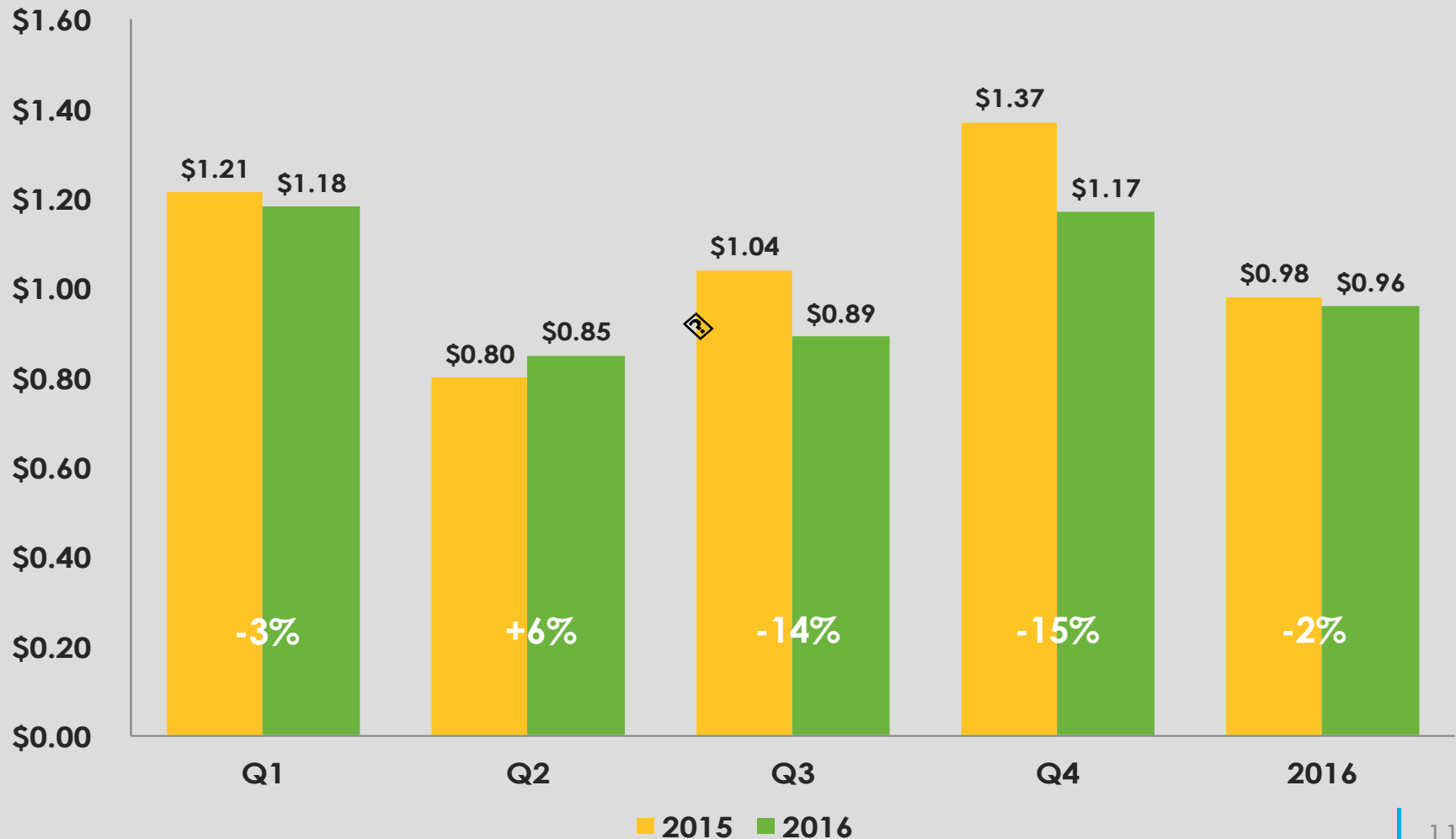
Mango Average Retail Price  
Total U.S., Whole, Monthly





# MANGO AVG. RETAIL PRICE

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

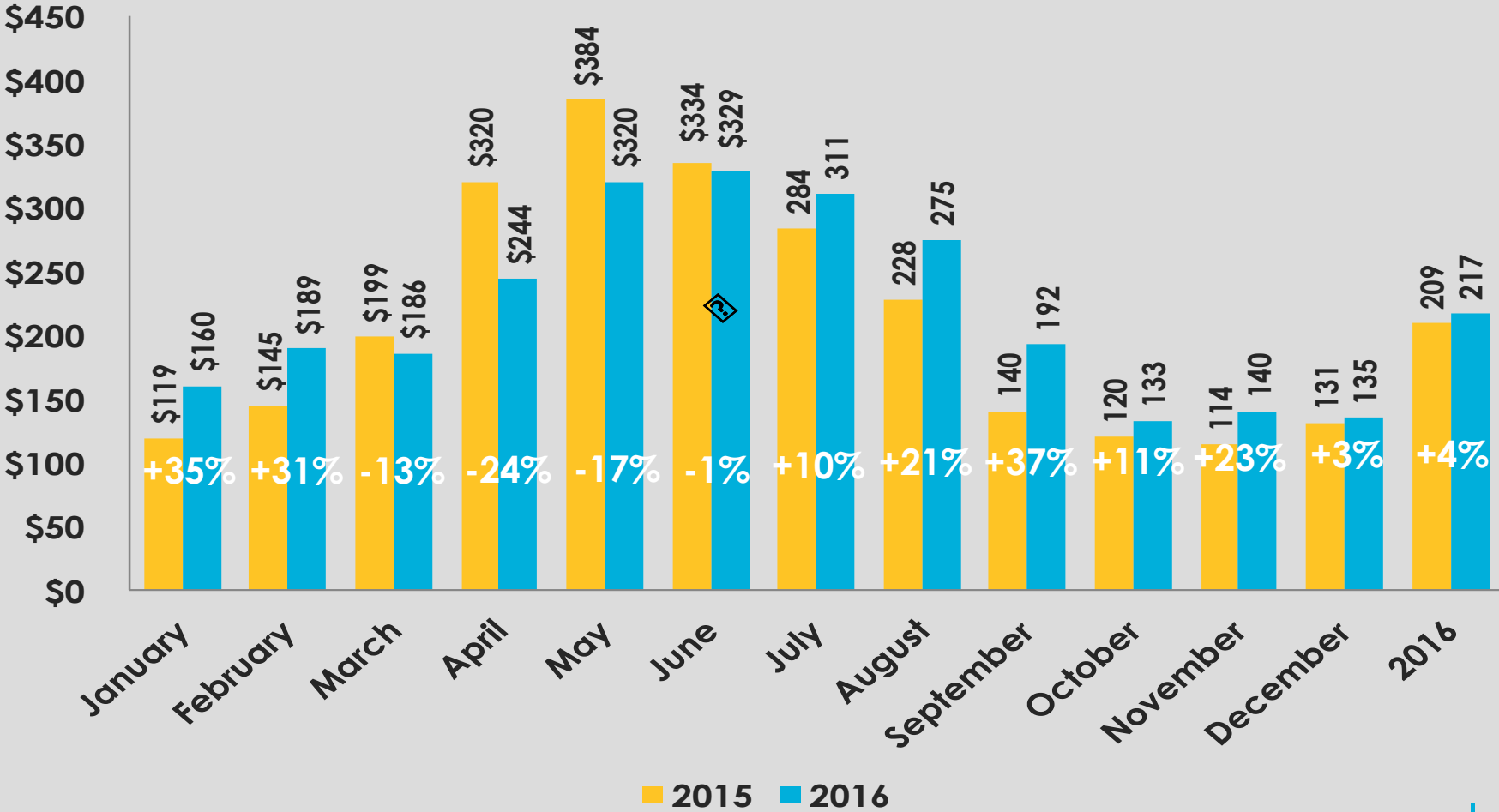


Source: Nielsen Perishables Group FreshFacts®

# MANGO AVG. DOLLARS PER STORE PER WEEK



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

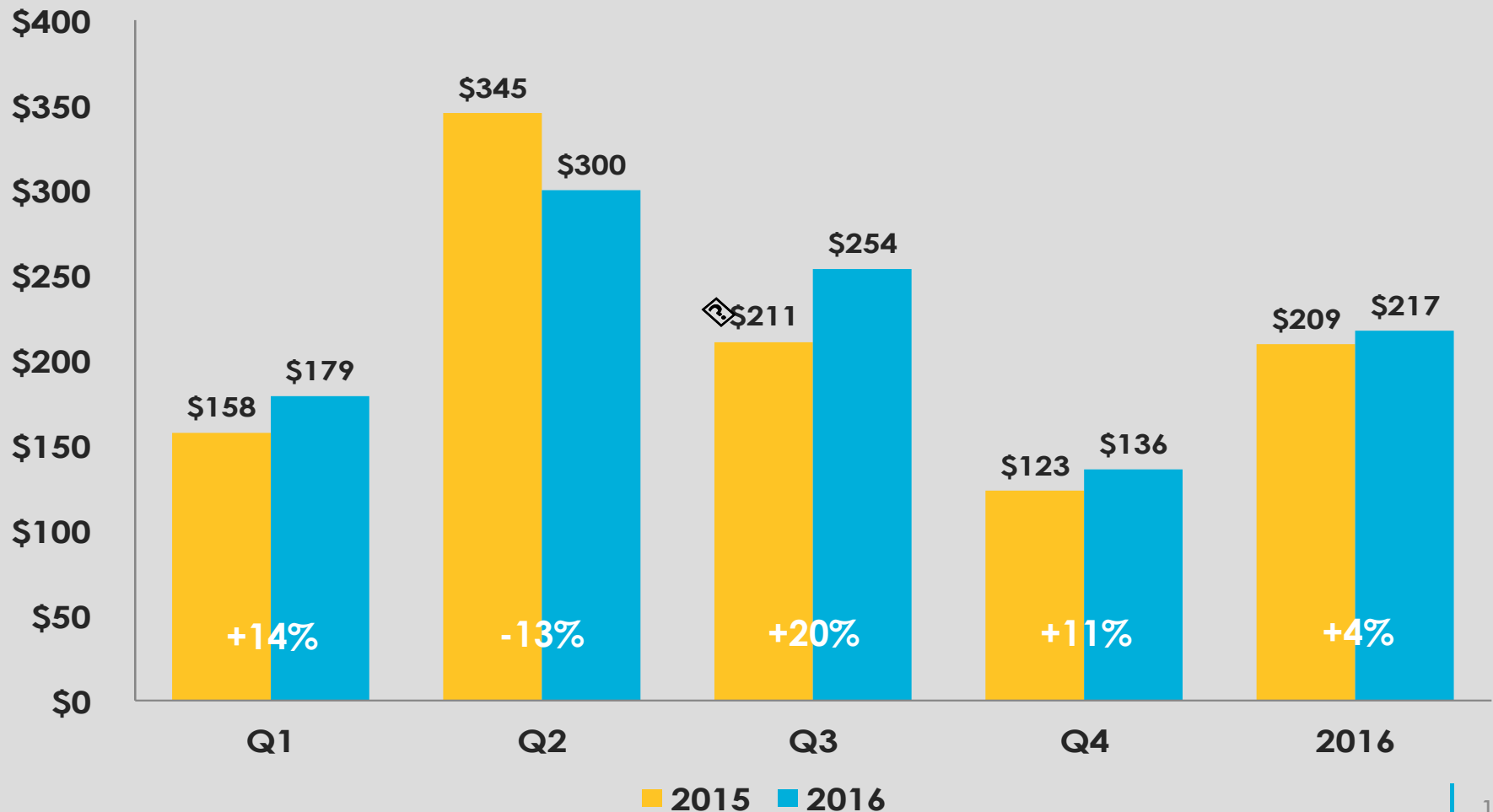


Source: Nielsen Perishables Group FreshFacts®

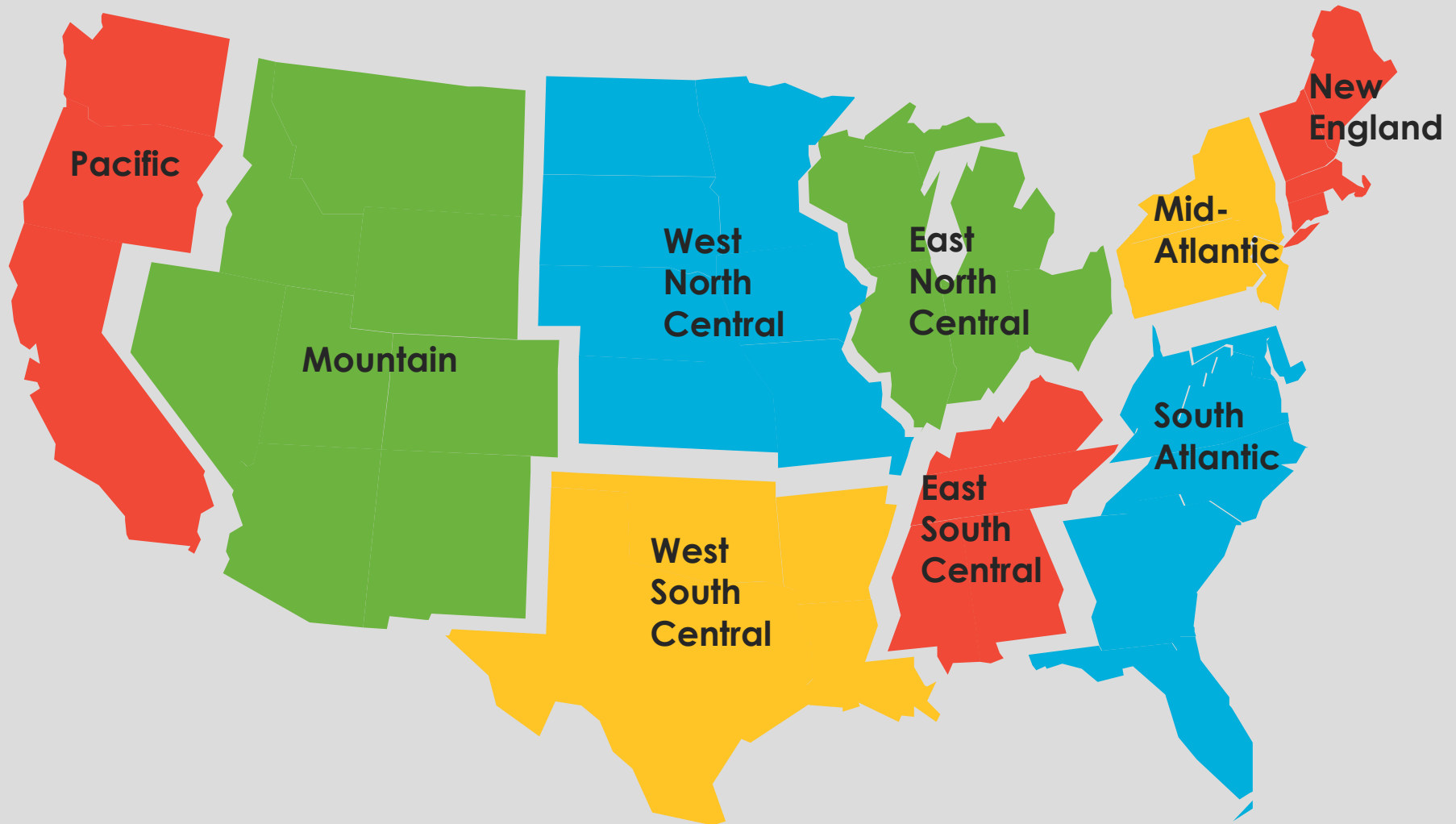
# MANGO AVG. DOLLARS PER STORE PER WEEK



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



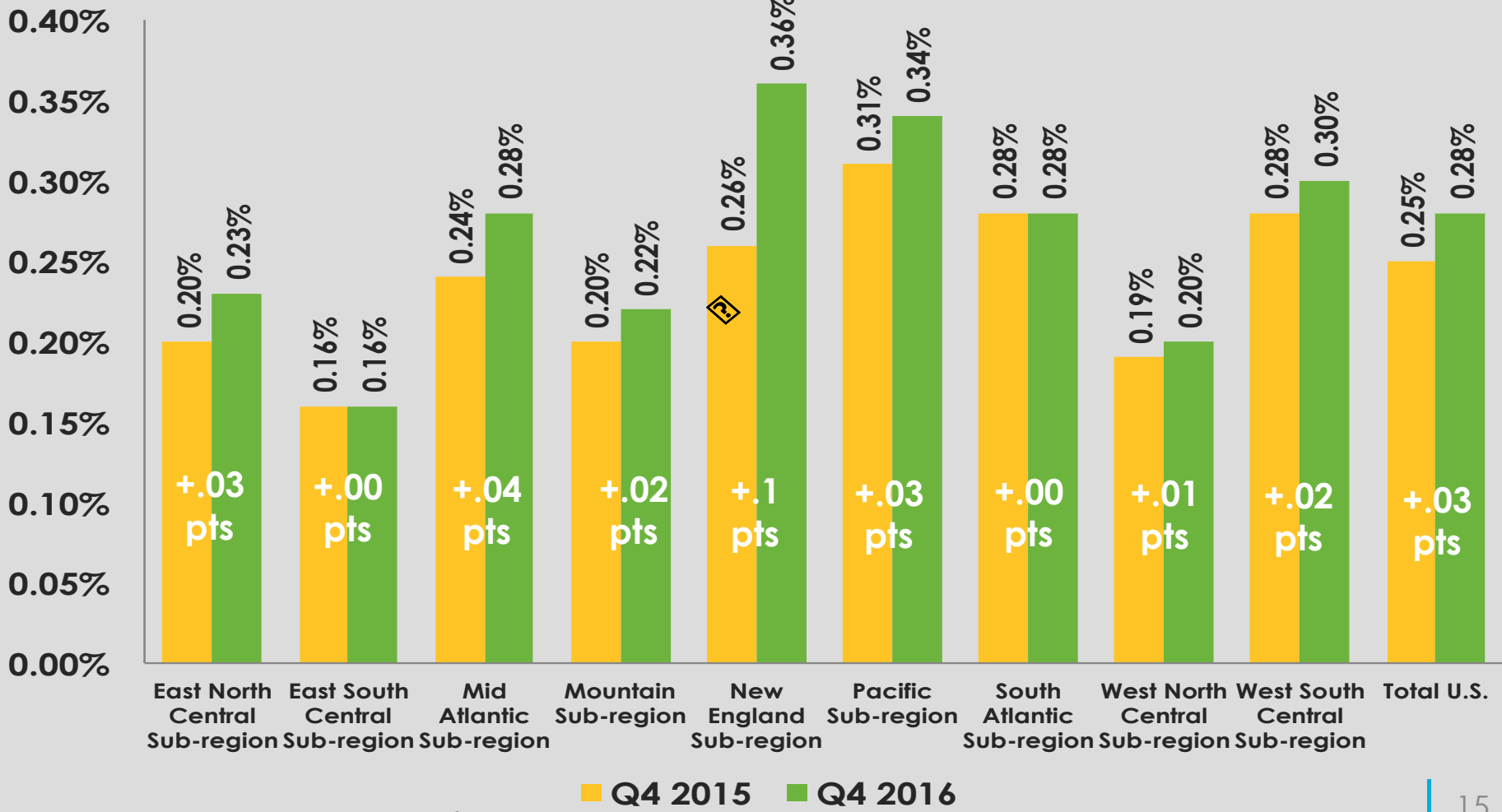
# MAP OF SUB-REGIONS



# MANGO CONTRIBUTION TO DEPT. SALES BY SUB-REGION



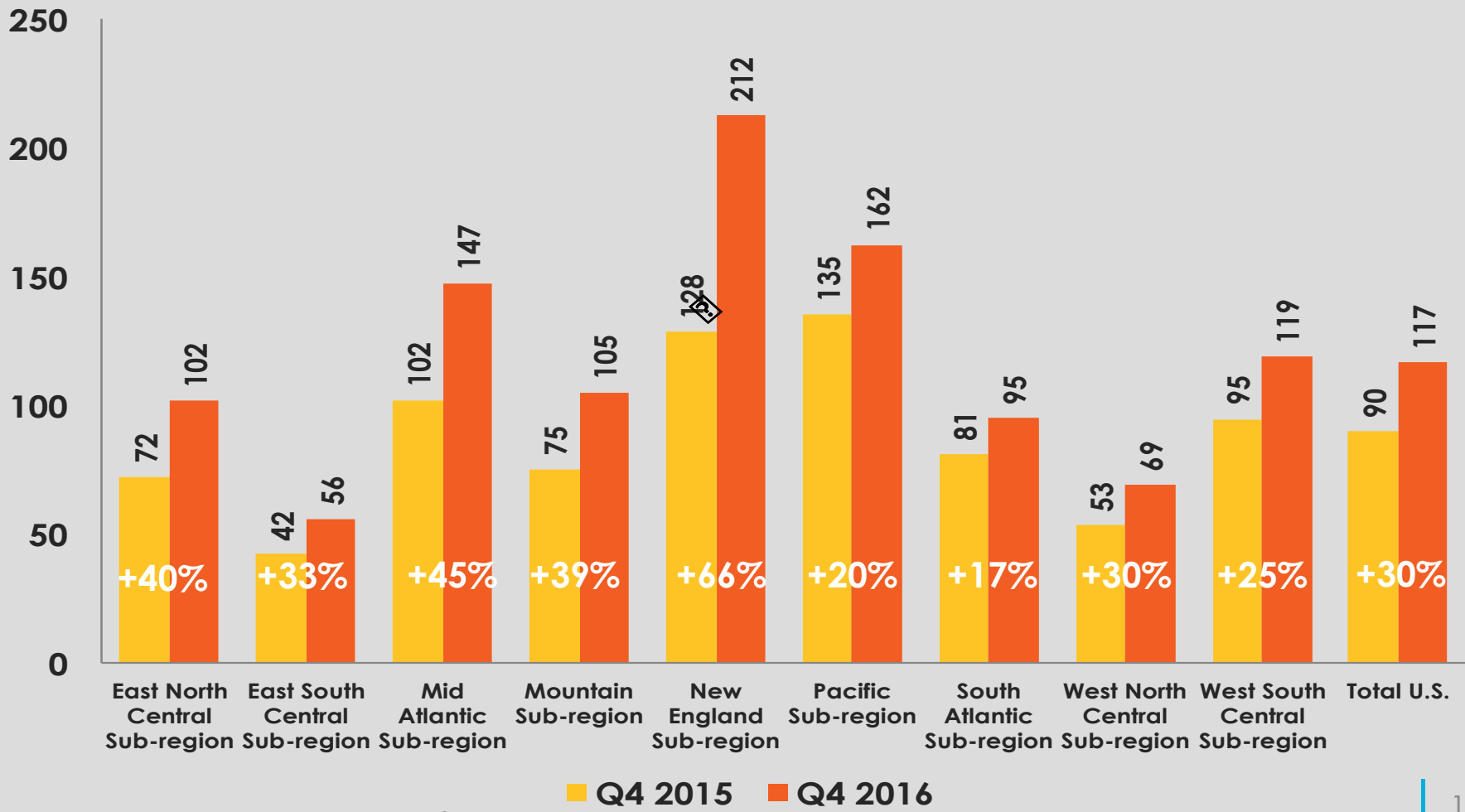
Mango Contribution to Produce Department Sales By Sub-Region, Whole Mangos



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



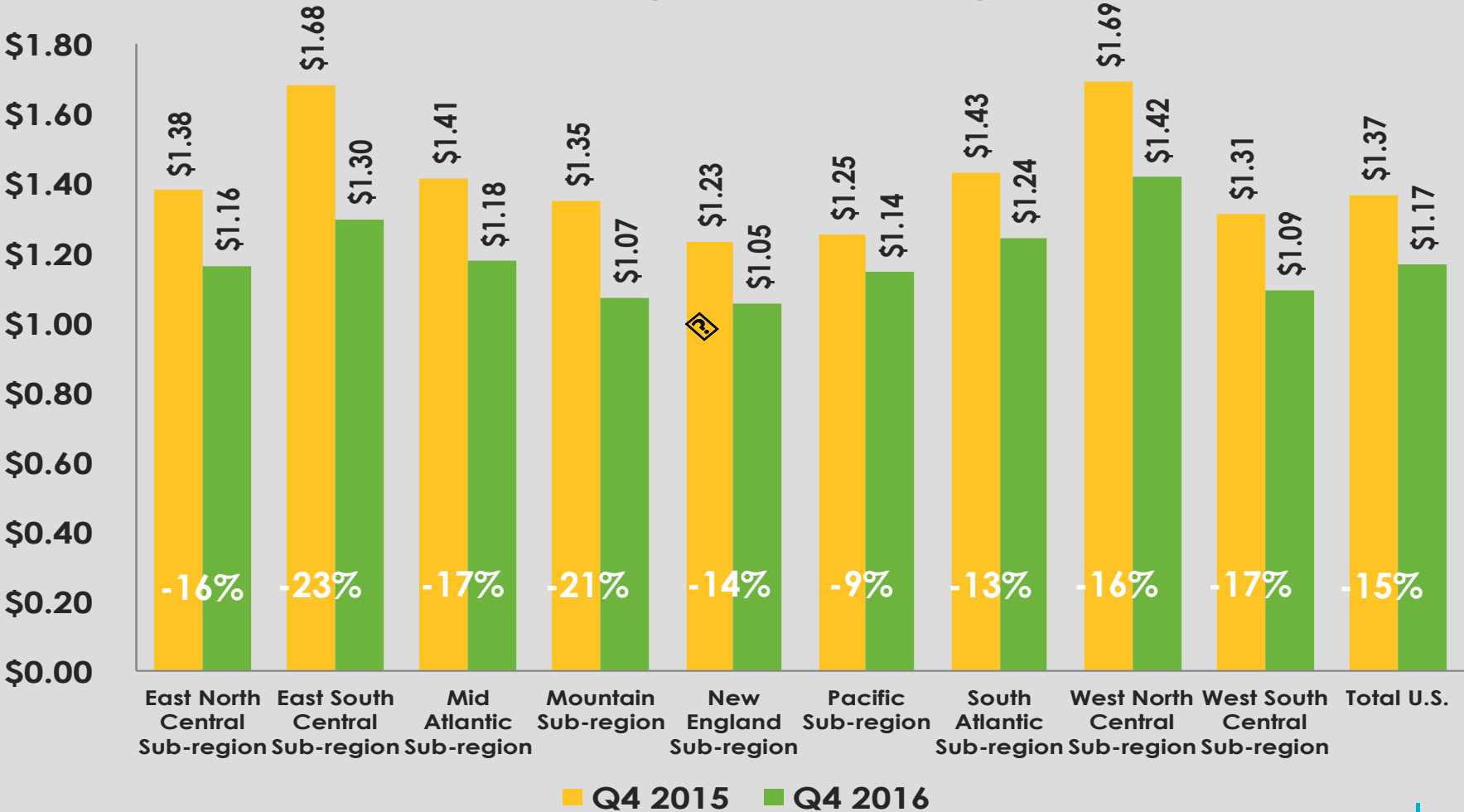
Source: Nielsen Perishables Group FreshFacts®



# MANGO AVG. RETAIL PRICE BY SUB-REGION



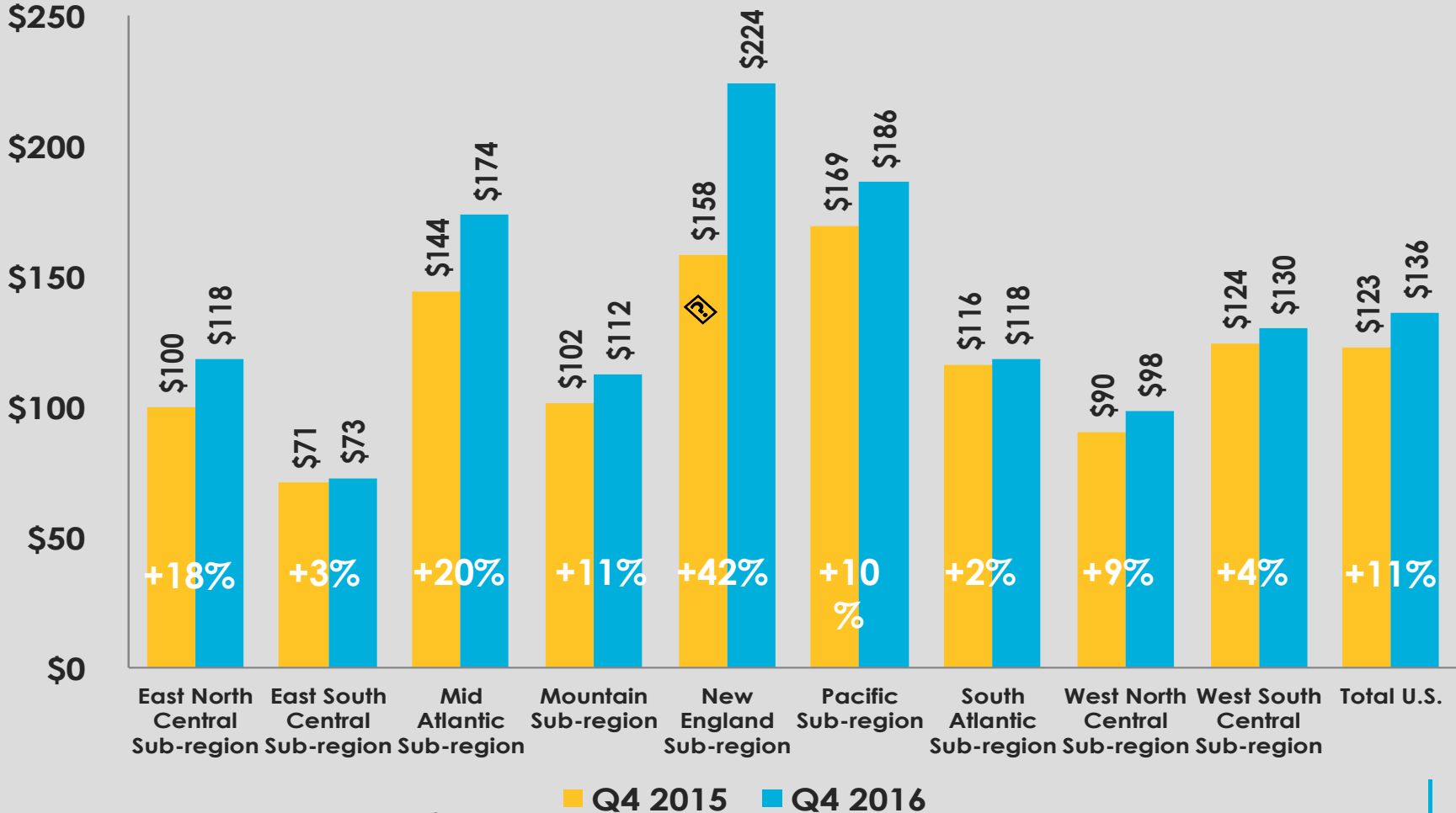
Mango Average Retail Price By Sub-Region, Whole Mangos



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



Source: Nielsen Perishables Group FreshFacts®



# AD TRACKING DATA

Q4 2016

# 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
- 259% increase in stores on ad in October 2016
- 103% increase in stores on ad in November 2016
- 133% increase in stores on ad in December 2016
- 140% increase in stores on ad for Q4 2016
- 7% increase in stores on ad for January to December 2016



# OCTOBER 2016 WEEKLY ADS

| Week Ending   | Organic Y/N | Unit       | 2015 Number of Stores on Ad | 2015 Average Weighted Ad Price | 2016 Number of Stores on Ad | 2016 Average Weighted Ad Price | Store Count % Change | Ad Price % Change |
|---------------|-------------|------------|-----------------------------|--------------------------------|-----------------------------|--------------------------------|----------------------|-------------------|
| 10/7/16       |             | each       | 517                         | 1.51                           | 1,792                       | 1.07                           | 247%                 | -29%              |
| 10/7/16       |             | per pound  |                             |                                | 14                          | 1.05                           |                      |                   |
| 10/7/16       | Y           | each       |                             |                                | 48                          | 1.79                           |                      |                   |
| 10/14/16      |             | each       | 664                         | 1.19                           | 2,802                       | 1.2                            | 322%                 | 1%                |
| 10/14/16      | Y           | each       |                             |                                | 32                          | 1.97                           |                      |                   |
| 10/21/16      |             | each       | 1,261                       | 1.28                           | 4,885                       | 1.16                           | 287%                 | -9%               |
| 10/21/16      |             | per pound  |                             |                                | 24                          | 2.19                           |                      |                   |
| 10/21/16      | Y           | each       |                             |                                | 1                           | 1.25                           |                      |                   |
| 10/28/16      |             | each       | 1,509                       | 1.02                           | 4,553                       | 1.01                           | 202%                 | -1%               |
| 10/28/16      |             | per pound  |                             |                                | 27                          | 2.99                           |                      |                   |
| <b>Totals</b> | <b>All</b>  | <b>All</b> | <b>3,951</b>                |                                | <b>14,178</b>               |                                | <b>259%</b>          |                   |

# NOVEMBER 2016 WEEKLY ADS



| Week Ending   | Organic Y/N | Unit       | 2015 Number of Stores on Ad | 2015 Average Ad Price | 2016 Number of Stores on Ad | 2016 Average Ad Price | Store Count % Change | Ad Price % Change |
|---------------|-------------|------------|-----------------------------|-----------------------|-----------------------------|-----------------------|----------------------|-------------------|
| 11/4/16       |             | each       | 1,804                       | 1.35                  | 5,308                       | 1.11                  | 194%                 | -18%              |
| 11/4/16       |             | per pound  |                             |                       | 24                          | 1.69                  |                      |                   |
| 11/4/16       | Y           | each       |                             |                       | 45                          | 2                     |                      |                   |
| 11/11/16      |             | each       | 2,060                       | 1.31                  | 3,784                       | 1.05                  | 84%                  | -20%              |
| 11/18/16      |             | each       | 793                         | 1.21                  | 2,657                       | 1.11                  | 235%                 | -8%               |
| 11/25/16      |             | each       | 910                         | 1.13                  | 3,843                       | 1.06                  | 322%                 | -6%               |
| 12/2/16       |             | each       | 5,396                       | 0.97                  | 6,495                       | 0.9                   | 20%                  | -7%               |
| 12/2/16       |             | per pound  | 13                          | 0.78                  | 61                          | 3.21                  | 369%                 | 312%              |
| 12/2/16       | Y           | each       |                             |                       | 79                          | 1.69                  |                      |                   |
| <b>Totals</b> | <b>All</b>  | <b>All</b> | <b>10,976</b>               |                       | <b>22,296</b>               |                       | <b>103%</b>          |                   |

# DECEMBER 2016 WEEKLY ADS



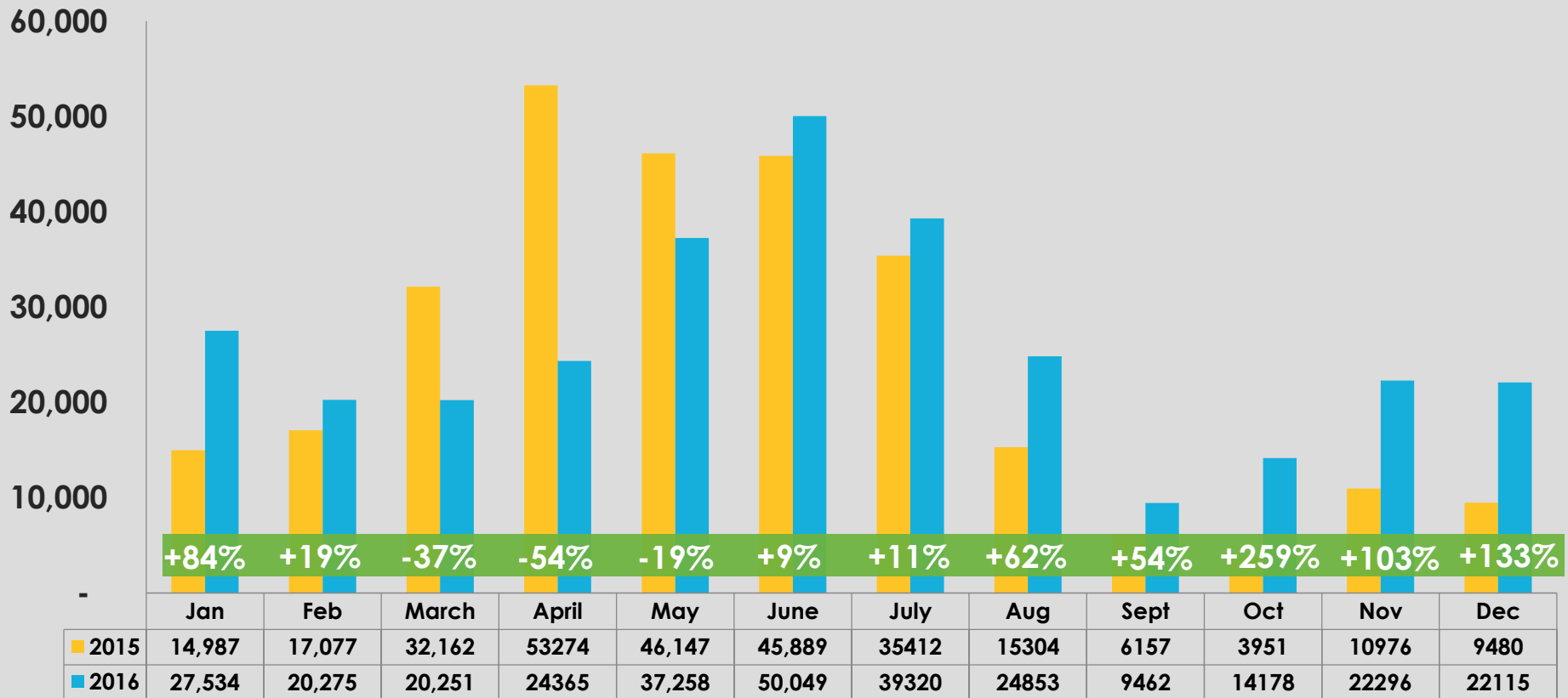
| Week Ending   | Organic Y/N | Unit       | 2015 Number of Stores on Ad | 2015 Average Ad Price | 2016 Number of Stores on Ad | 2016 Average Ad Price | Store Count % Change | Ad Price % Change |
|---------------|-------------|------------|-----------------------------|-----------------------|-----------------------------|-----------------------|----------------------|-------------------|
| 12/9/16       |             | each       | 6,444                       | 1.11                  | 7,000                       | 1.03                  | 9%                   | -7%               |
| 12/9/16       |             | per pound  | 6                           | 0.99                  | 58                          | 2.28                  | 867%                 | 130%              |
| 12/9/16       | Y           | each       | 9                           | 1.98                  | 467                         | 1.4                   | 5089%                | -29%              |
| 12/16/16      |             | each       | 2,941                       | 0.97                  | 3,634                       | 1.06                  | 24%                  | 9%                |
| 12/16/16      |             | per pound  |                             |                       | 34                          | 2.99                  |                      |                   |
| 12/16/16      | Y           | each       | 80                          | 1.5                   | 289                         | 1.34                  | 261%                 | -11%              |
| 12/23/16      |             | each       |                             |                       | 3,263                       | 1.03                  |                      |                   |
| 12/23/16      |             | per pound  |                             |                       | 34                          | 2.99                  |                      |                   |
| 12/23/16      | Y           | each       |                             |                       | 341                         | 1.56                  |                      |                   |
| 12/30/16      |             | each       |                             |                       | 6,740                       | 1.04                  |                      |                   |
| 12/30/16      |             | per pound  |                             |                       | 30                          | 2.94                  |                      |                   |
| 12/30/16      | Y           | each       |                             |                       | 225                         | 1.04                  |                      |                   |
| <b>Totals</b> | <b>All</b>  | <b>All</b> | <b>9,480</b>                |                       | <b>22,115</b>               |                       | <b>133%</b>          |                   |

USDA did not update the report for the last two weeks of December 2015. They did report during these weeks in 2016.



# 2016 MONTHLY NUMBER OF STORES ON AD

## 2016 Monthly Number of Stores on Ad



311,956 stores on ad through December 2016 compared to 290,816 on ad during this period in 2015, which is a 7% increase

