Mango Retail Performance Report 2017

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Executive Summary

Fruit and Tropical Fruit Overview

Mango dollar growth outpaced total fruit in 2017.

- Fruit dollars/store/week grew about 1% to $24,658.
- Staple fruits, like apples, oranges and melons had declining sales, driving the slow growth of total fruit.
- Mangos grew 4% to $226/store/week and 5% to 238 in volume/store/week.
- Mangos remain in #20 position sales and #15 in volume.

Tropical fruit category continues to grow at steady pace.

- Tropical fruit dollars/store/week grew 4% in 2017.
- Mangos represent one third of tropical fruit with 36% of category dollars.
- Of the top five tropical fruits only mangos and dates had growth in 2017.

Whole Mango Overview

Mango sales growth continued in 2017.

- Mango volume /store /week increased 5% to 238 mangos.
- Mango dollars/store /week increased 4% to $226
- Mango volume increased in every quarter except Q2 (-3%) due to slower imports in May and June driving up retail price.
- Despite a supply gap in Q2 for two straight years, mango dollars and volume were still higher in Q2 than any other quarter.

Mango dollars and volume increased in 2017 in all regions, except West South Central,.

- New England had the highest dollar sales, $314 /store/week, followed by Pacific at $289/store/week It's important to note that the Pacific was the only sub-region with double digit growth.
- Only the West South Central sub-region decreased in dollars/store/week, down 5%, driven by substantial volume index declines in the Houston (-24) and Dallas (-22) markets.

Whole Mango Promotion and Pricing Overview

Slightly less mango volume was sold on promotion in 2017.

- 31% of mango volume was sold on promotion, down 1 point from prior year.
- Q2 had the least volume sold on promotion at 30%.

Both promo and non-promo pricing dropped in 2017

- Average retail price decreased from prior year in all quarters, except Q2.
- Average retail price dropped 1% to $.95.
- Promotional average retail price decreased 2% to $.80, and non-promotional average retail price dropped 1% to $1.02.
- Related to the supply gap, the average retail price for mangos increased in May, June and July when mangos are historically priced the lowest.

Most sub-regions posted lower average retail prices.

- West South Central and Mountain sub-regions had the lowest retail price at $.73 and $.76 respectively, both increasing 1% from last year.
- Mid-Atlantic sub-region had the highest average retail price at $1.15 per mango, a 2% drop from last year.
- Both East South Central and New England saw a 5% decline in average retail price to $1.01 each.

Organic Mango Overview

Organic mango share remains at 3% of whole mango dollars.

- Organic mango dollars and volume both grew double digits in 2017, up 12% and 28% respectively.
- Q2 and Q3 had the strongest organic mango sales in 2017, accounting for $1.9 million dollars in sales each quarter.
- The Pacific sub-region had the strongest organic mango sales with 37% share of dollars in 2017.
- Organic mangos were priced nearly 2x times higher than all mangos,
- Average retail price for organic mangos dropped 12% to $1.81.
- In Q1, the average retail price for organic mangos declined 27%, to $1.93.
- Organic mango pricing was highest in New England at $2.49 each and lowest in West North Central at $1.41 each.

Fresh Cut Mango Overview

Fresh cut mango continues to outpace both whole mango and fresh cut fruit growth.

- Fresh cut mango remains ranked at #6 of total fresh cut fruit, while fresh cut mango mix was #11.
- Similar to whole mangos, Q2 had the strongest fresh cut mango sales with $79/store/week.
- 90% of stores sold mango only, fresh-cut items in 2017, down 5.5 points from prior year.

Mango Going Mainstream

Continuous mango growth suggests more Americans are including mangos in their diet

- One of the top Google searches for food continues to be "how to cut a mango" with hundreds of how tos and videos available.
- Fruit selection and preparation are the obstacles consumers face with whole mangos. The growth of fresh cut is helping to bridge that challenge.
- Mangos comprise more than one third of tropical fruit sales, indicating that we may need to consider moving mangos to a separate category.
- Mangos are found as an ingredient everywhere, from meal kits to fine dining, signature cocktails to juice bars.
- Mangos are a part of the mainstream social conversation; in the summer of 2018 consumers will be able to share their passion for mangos with the release of the mango emoli!

Fruit Category Performance 2017

Top 25 Fruit Dollars & Contribution

Mangos increased 3.8% in dollars/store/week, almost 4x better than the overall fruit category.

Mangos are in the 20th position of the fruit ranking by dollars and have held that position since 2013.

Fruit as a contributor to the produce department slipped slightly (-.2%), while mangos remained flat.

Mango dollars/store/week increased at a higher rate than two thirds of the Top 25

Fruit Sales YOY Change and Contribution

	RANK	DOLLARS/STORE /WEEK	% CHANGE VS YAGO	DOLLAR CONTRIBUTION	% CHANGE VS YAGO
Fruits		$24,658	0.9%	46.7%	-0.2%
Apples	1	$3,040	-4.8%	5.8%	-0.4%
Grapes	2	$2,768	0.4%	5.2%	-0.0%
Bananas	3	$2,621	0.6%	5.0%	-0.0%
Strawberries	4	$2,212	-0.0%	4.2%	-0.1%
Avocados	5	$1,654	12.9%	3.1%	0.3%
Mandarins	6	$1,421	10.9%	2.7%	0.2%
Blueberries	7	$1,277	5.2%	2.4%	0.1%
Oranges	8	$798	-5.8%	1.5%	-0.1%
Cherries	9	$780	11.3%	1.5%	0.1%
Watermelon	10	$760	-4.4%	1.4%	-0.1%
Raspberries	11	$678	-1.7%	1.3%	-0.0%
Lemons	12	$564	4.0%	1.1%	0.0%
Peaches	13	$448	-0.9%	0.8%	-0.0%
Blackberries	14	$444	8.5%	0.8%	0.1%
Pears	15	$343	-9.3%	0.6%	-0.1%
Limes	16	$342	4.1%	0.6%	0.0%
Cantaloupe	17	$305	-11.7%	0.6%	-0.1%
Pineapples	18	$275	-3.7%	0.5%	-0.0%
Nectarines	19	$248	-6.5%	0.5%	-0.0%
Mango	20	$226	3.8%	0.4%	0.0%
Plums	21	$186	0.3%	0.4%	-0.0%
Grapefruit	22	$166	2.5%	0.3%	0.0%
Kiwi	23	$125	0.2%	0.2%	-0.0%
Honeydew	24	$76	-2.2%	0.1%	-0.0%
Papaya	25	$64	-7.6%	0.1%	-0.0%

Source: Nielsen FreshFacts® 2017 vs. YAGO

Top 25 Fruit Volume & Contribution

Mangos increased 4.9% in volume/store/week, while the overall fruit category had a slight decrease in volume/store/week (-.5%).

Mangos are in the 15th position of the fruit ranking by volume.

Mango volume/store/week increased at a higher rate than 80% of the Top 25

Fruit Volume YOY Change and Contribution

RANK	PRODUCT	VOLUME /STORE/WEEK	% CHANGE VS YAGO	VOLUME CONTRIBUTION TO DEPARTMENT	% CHANGE VS YAGO
	Fruits	17,962	-0.5%	52.1%	-0.4%
1	Bananas	4,753	2.1%	13.8%	0.3%
2	Watermelon	1,888	-10.2%	5.5%	-0.6%
3	Apples	1,855	-2.6%	5.4%	-0.2%
4	Avocados	1,294	-2.8%	3.8%	-0.1%
5	Grapes	1,269	3.2%	3.7%	0.1%
6	Limes	835	11.4%	2.4%	0.2%
7	Strawberries	754	3.3%	2.2%	0.1%
8	Oranges	686	-4.0%	2.0%	-0.1%
9	Lemons	617	7.1%	1.8%	0.1%
10	Blueberries	381	4.1%	1.1%	0.0%
11	Cantaloupe	364	-1.9%	1.1%	-0.0%
12	Mandarins	297	11.7%	0.9%	0.1%
13	Cherries	263	23.0%	0.8%	0.1%
14	Kiwi	244	-10.1%	0.7%	-0.1%
15	Mango	238	4.9%	0.7%	0.0%
16	Peaches	235	-12.0%	0.7%	-0.1%
17	Pears	221	-9.2%	0.6%	-0.1%
18	Raspberries	201	-7.4%	0.6%	-0.0%
19	Blackberries	156	6.4%	0.5%	0.0%
20	Nectarines	123	-13.4%	0.4%	-0.1%
21	Pineapples	107	-2.6%	0.3%	-0.0%
22	Grapefruit	101	-1.8%	0.3%	-0.0%
23	Plums	88	-4.9%	0.3%	-0.0%
24	Honeydew	62	1.9%	0.2%	0.0%
25	Tangerines	46	-4.2%	0.1%	-0.0%

Source: Nielsen FreshFacts® 2017 vs. YAGO

Tropical Fruit Performance 2017

Tropical Fruit Dollars/Store/Week

Overall mango dollars/store/week increased 4% to $226.

Mangos were on pace with the growth of the overall tropical fruit category.

The largest tropical growth rates were seen in the low volume fruit like guava, figs and dates.

Tropical Fruit Dollars/Store/Week
Total US, 2017

	DOLLARS /STORE/WEEK	% CHANGE vs YAGO
Total Tropical Fruit	**$619**	**+4%**
Mango	$226	+4%
Kiwi	$125	+0%
Papaya	$64	-8%
Dates	$52	+25%
Pomegranate	$39	-16%
Tomatillo	$33	+6%
Other Specialty Fruit	$18	+33%
Guava	$15	+81%
Coconut	$15	+9%
Figs	$11	+25%

Source: Nielsen FreshFacts® 2017 vs YAGO; Produce Database - Whole

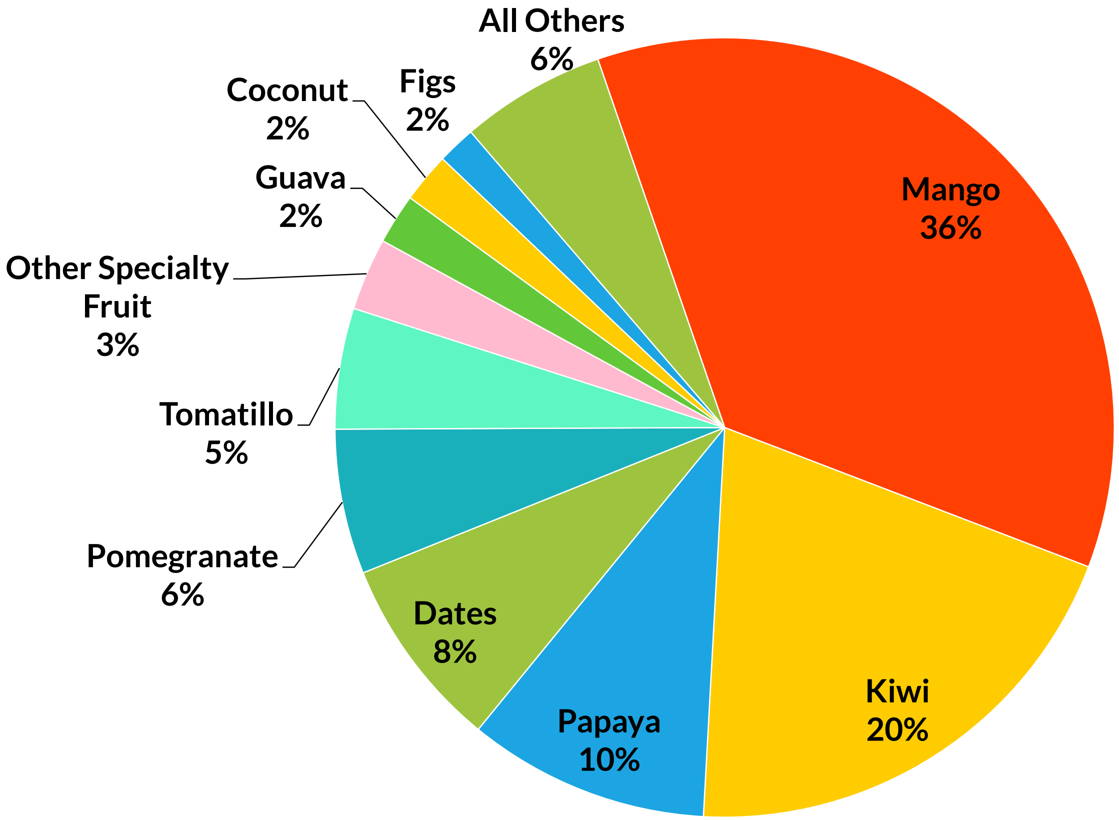
Tropical Fruit Dollars Share

Mangos had the largest share of tropical fruit dollars at 36%.

The next three items combined (kiwi, papaya and dates) made up a 38% share.

This is an indicator that mangos are moving to the mainstream and may need to be separated from tropical fruit to be represented as a stand alone category, similar to the pineapple category.

Tropical Fruit Dollars/Store/Week Total US, 2017



Source: Nielsen FreshFacts® 2017 vs YAGO; Produce Database - Whole

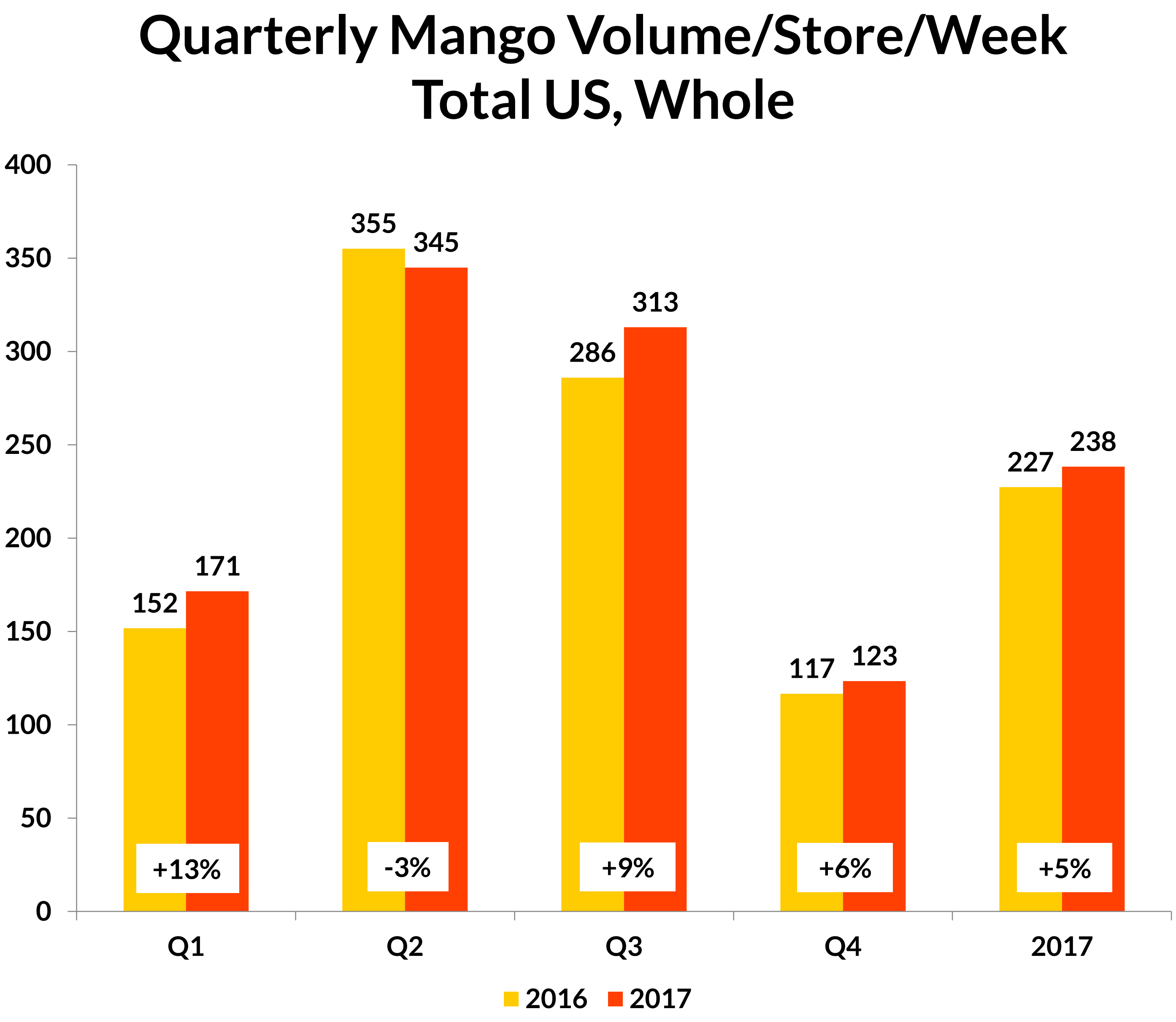
Whole Mango Performance 2017

Quarterly Volume/Store/Week

Whole mango volume increased to 238 mangos/store/week, up 5% .

Q1 provided the largest increase (+13%) to 171 mangos/store/week.

Q2 had the strongest mango volume, but in 2017, volume/store/week was down 3%, driven by reduced import volume.

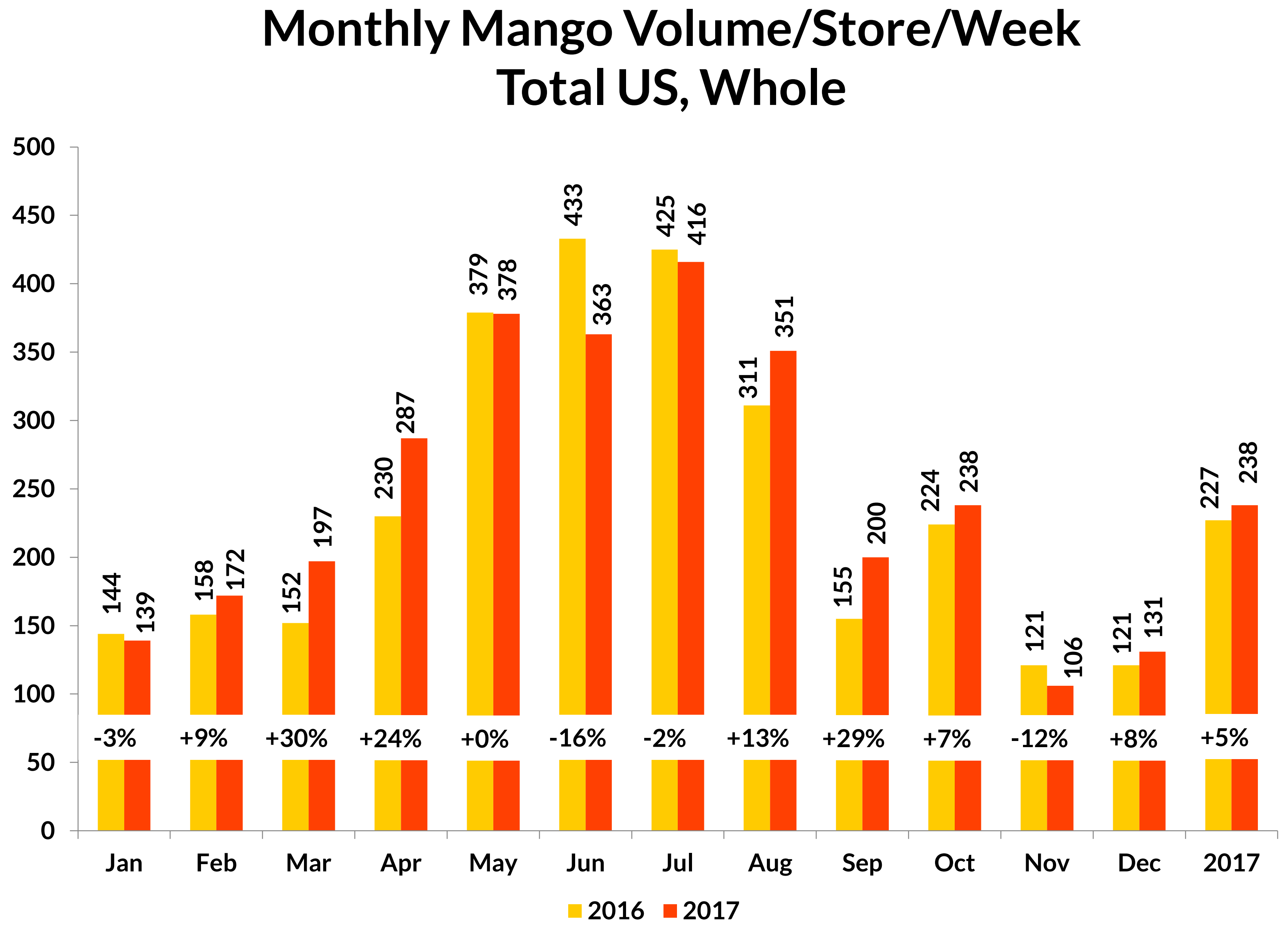


Source: Nielsen FreshFacts® 2017 vs YAGO

Monthly Volume/Store/Week

The largest increases in volume/store/week were observed in March (+30%), September (+29%), and April (+24%).

Significant decrease (-16%) in movement in June, drove the volume in Q2. This aligned with reduced import volume in May and June 2017.



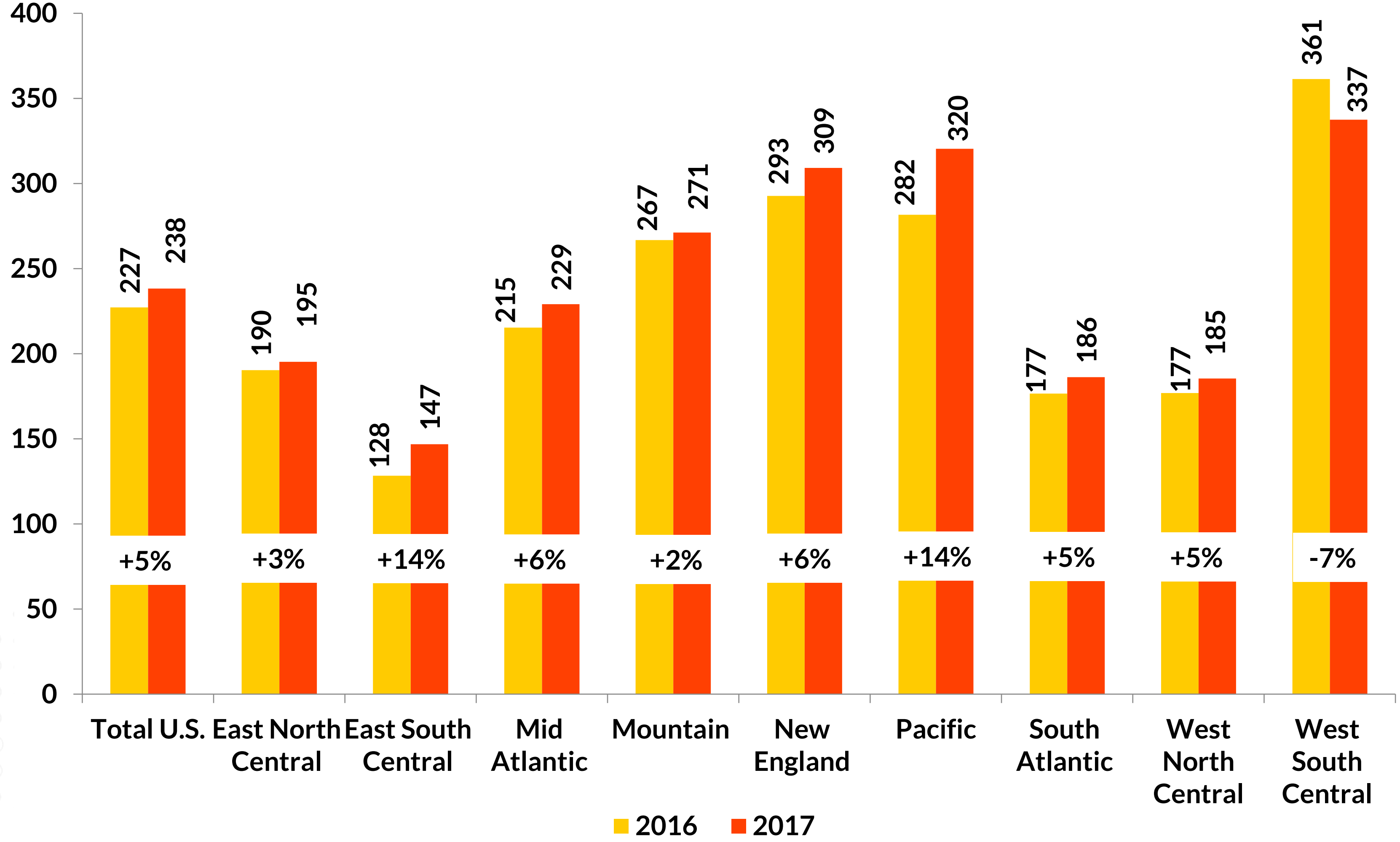
Source: Nielsen FreshFacts® 2017 vs YAGO

Volume/Store/Week by Sub-Region

Mango volume was up compared to the prior year across all sub-regions, except West South Central.

The top sub-regions based on volume/store/week were West South Central (337), Pacific (320), and New England (309).

The sub-regions with the highest growth in volume were East South Central and Pacific, both up by 14% .



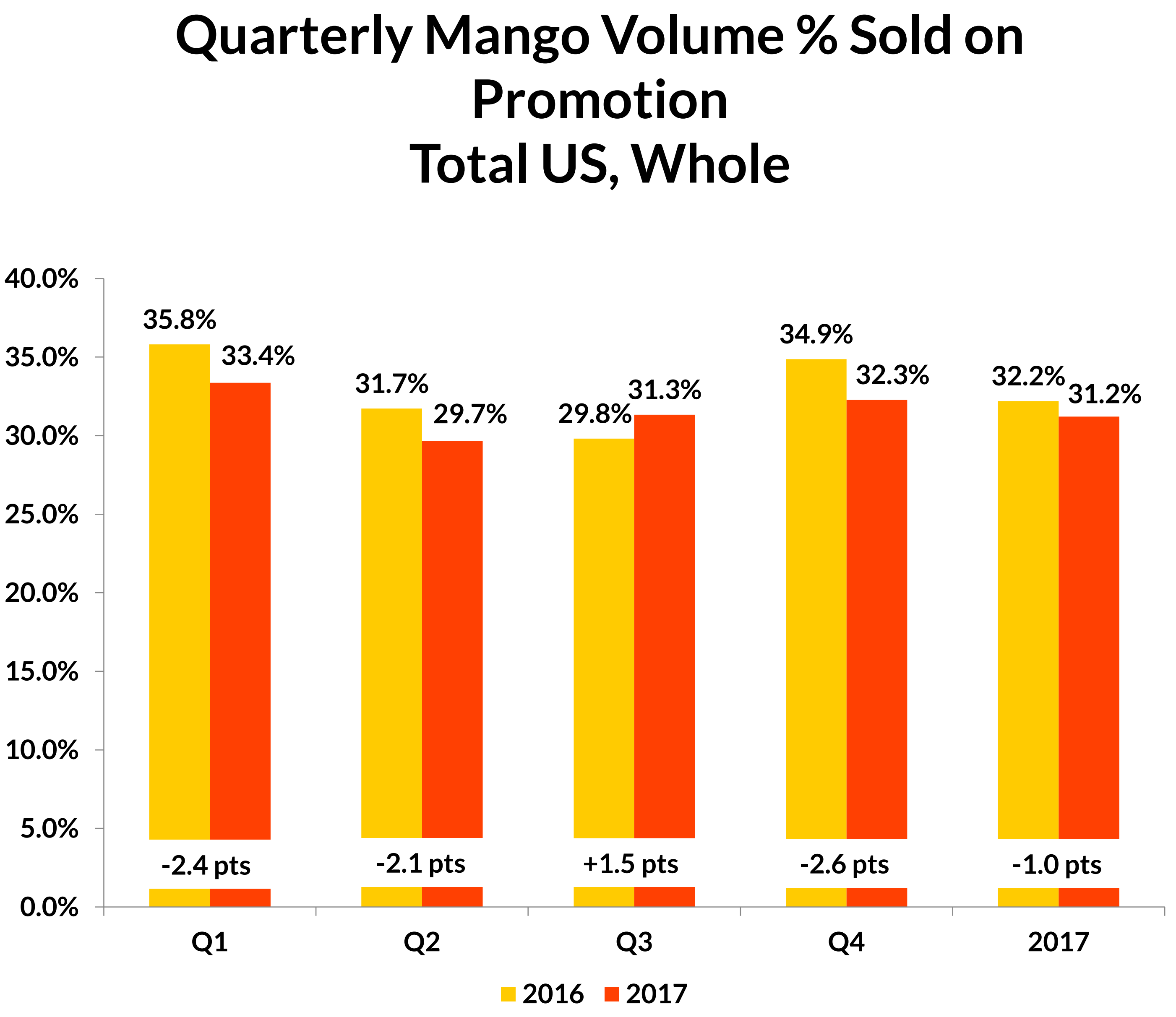
Source: Nielsen FreshFacts® 2017 vs YAGO

Quarterly Volume Sold on Promotion

31% of whole mangos were sold on promotion during 2017, down 1 point from prior year.

Q2 had the smallest portion of volume sold on promotion at 30%.

Q1 had the largest share of volume sold on promotion at 33%.



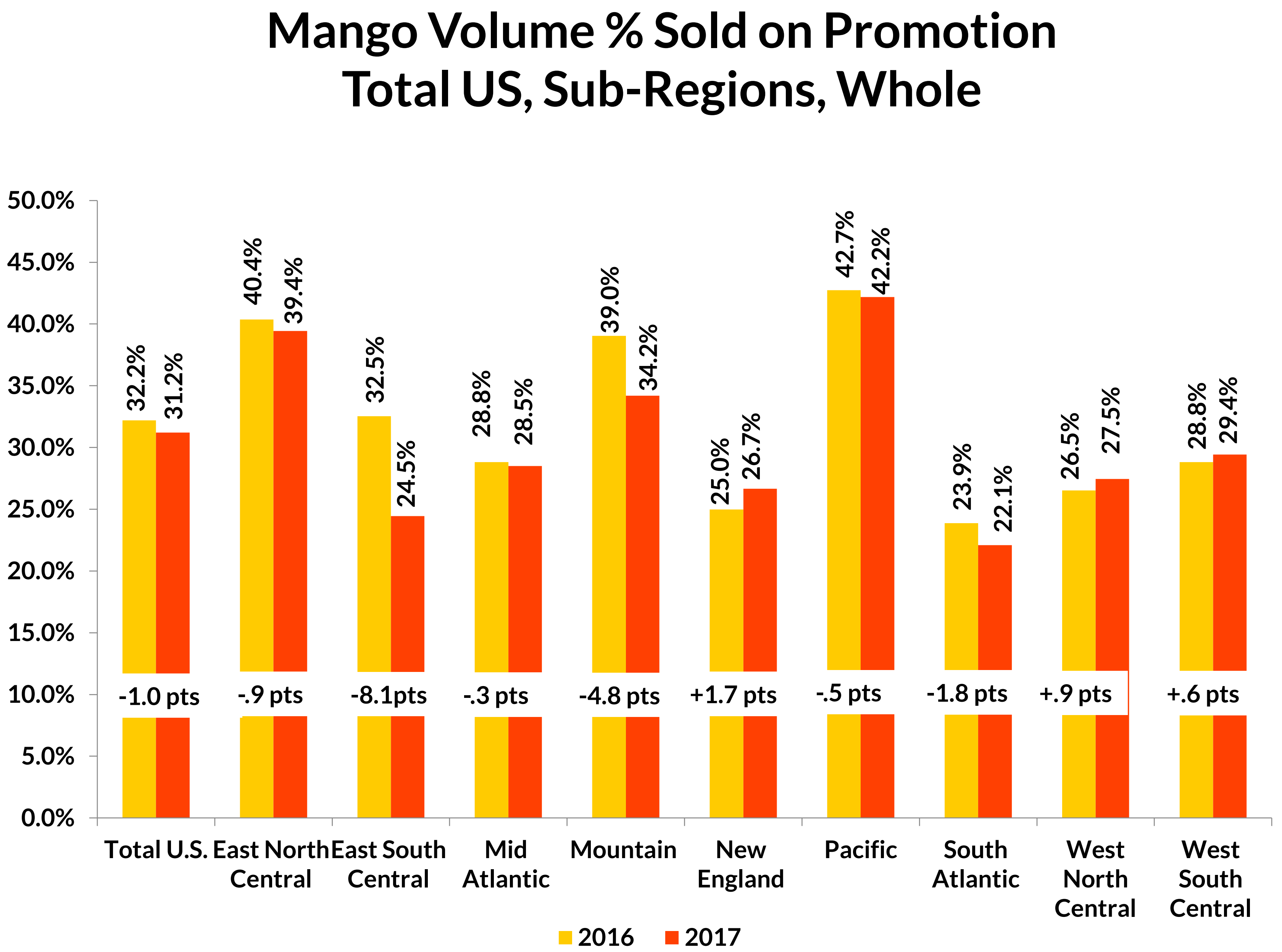
Source: Nielsen FreshFacts® 2017 vs YAGO

Volume Sold on Promotion by Sub-Region

The Pacific sub-region had the highest share of volume on promotion at slightly over 42%.

The New England sub-region increased the most, up 1.7 points.

The East South Central sub-region decreased the most, down 8.1 points.



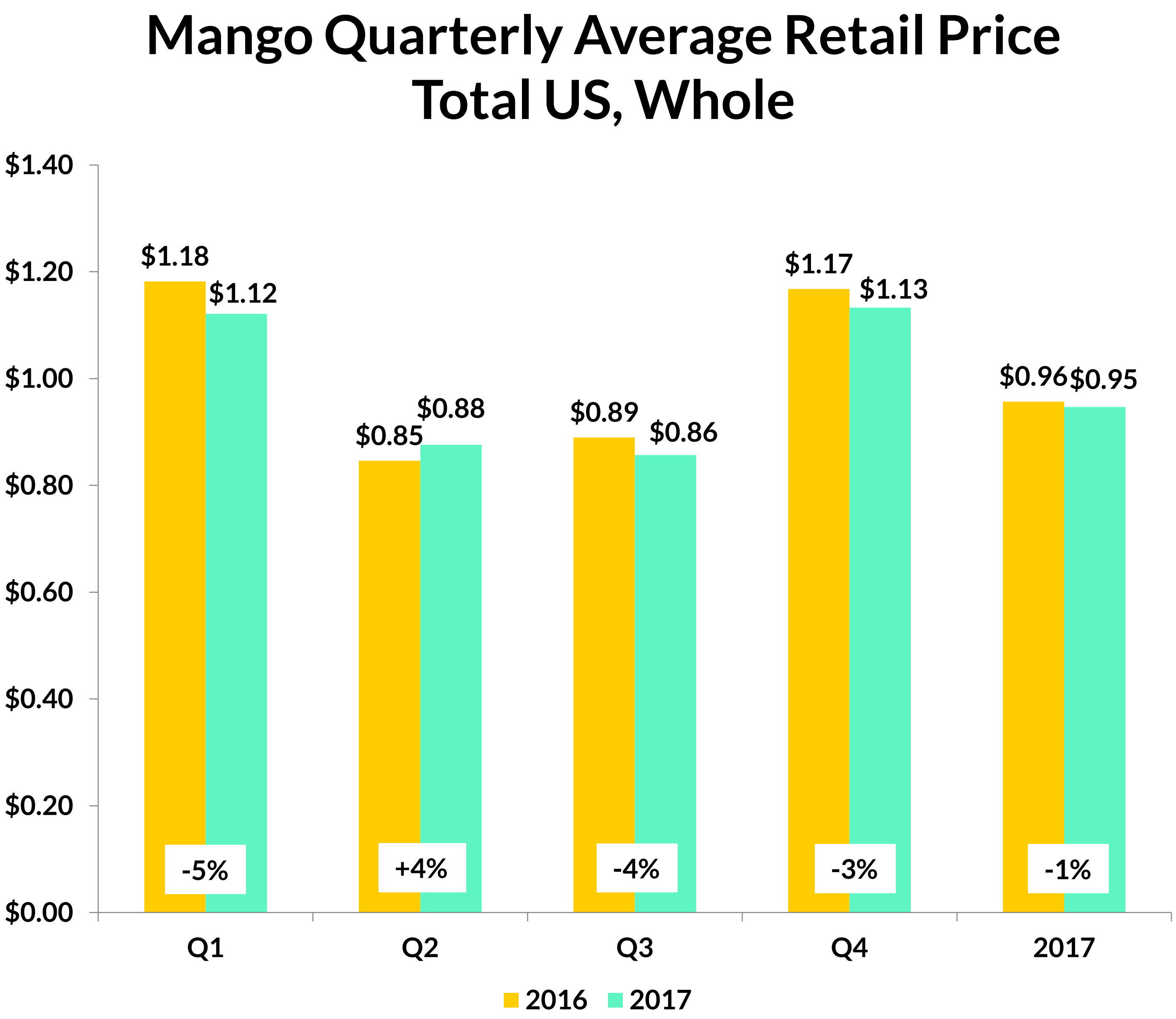
Source: Nielsen FreshFacts® 2017 vs YAGO

Quarterly Average Retail Price

The average retail price for whole mangos decreased slightly from $.96 to $.95.

In Q2, average price increased 4% to $.88, as a result of reduced import volume. Average retail price decreased in all other quarters.

Q1 had the largest decrease (-5%) to $1.12. This aligns with the increase in both imports and retail volume in Q1.



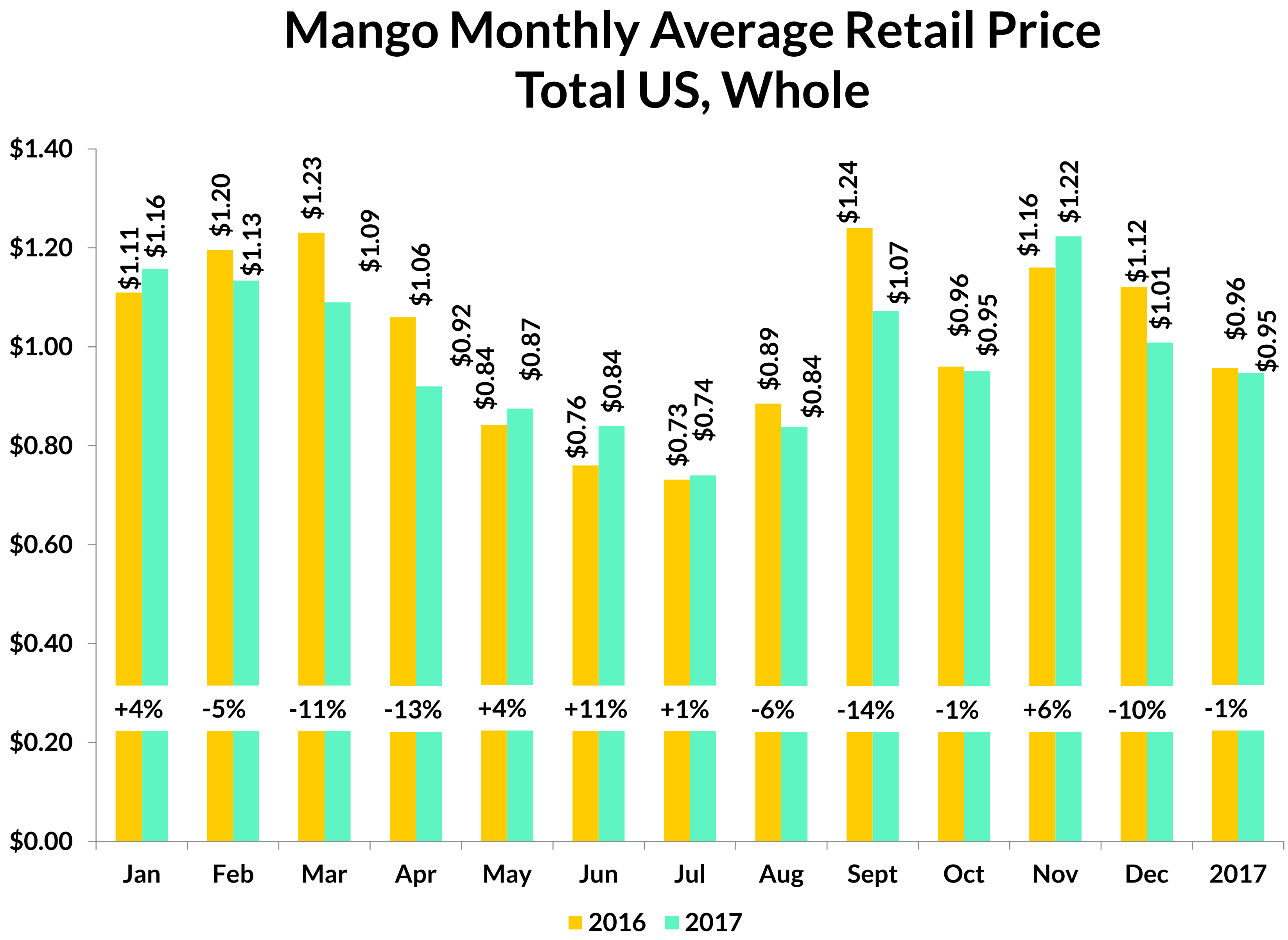
Source: Nielsen FreshFacts® 2017 vs YAGO

Monthly Average Retail Price

Overall average retail price decreased by 1%, to $.95.

Corresponding with increased volume, the largest price decreases were also in September (-14%), April (-13%) and March (-11%) from prior year.

The largest increase in average retail price was in June.

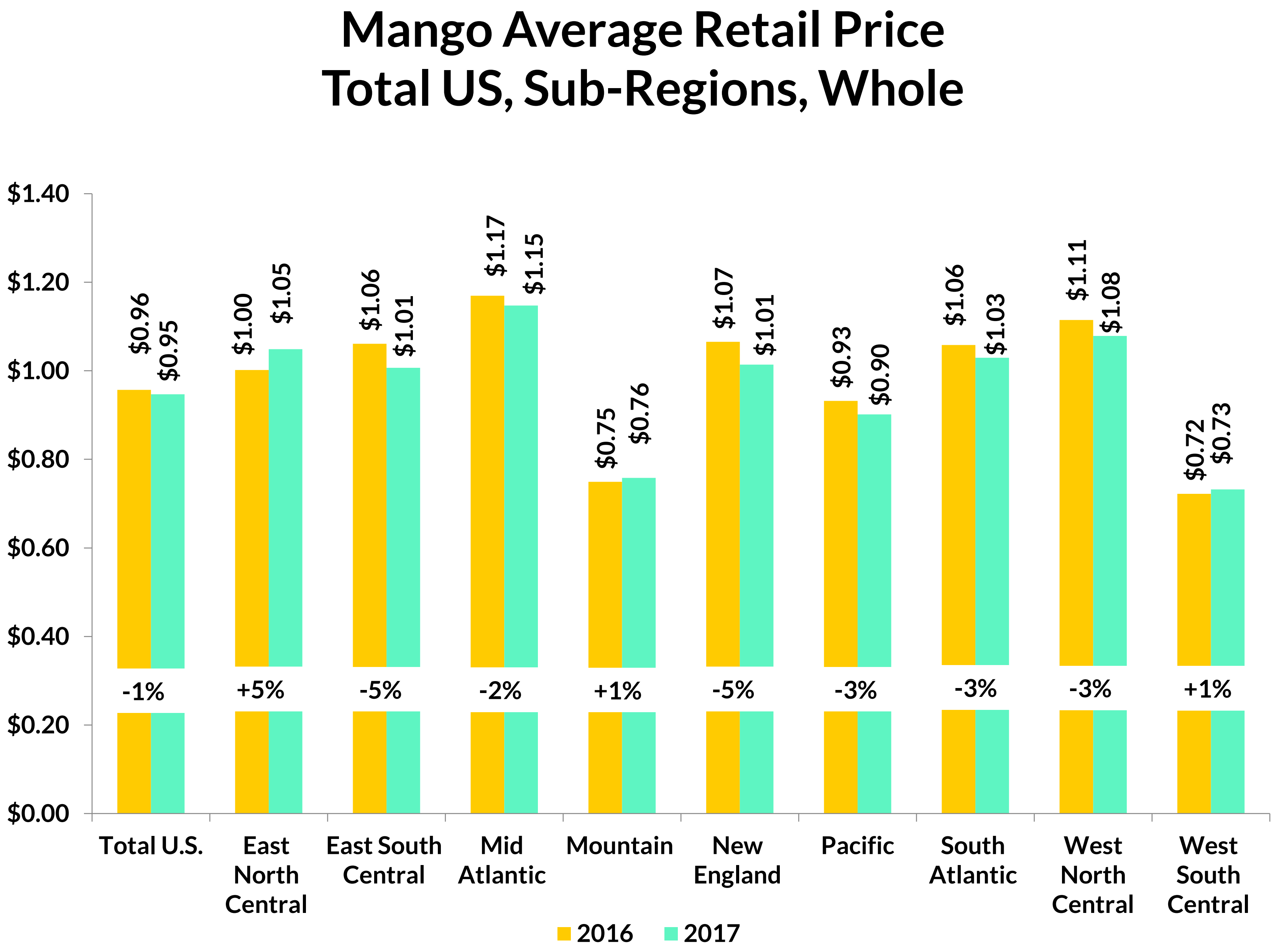


Source: Nielsen FreshFacts® 2017 vs YAGO

Average Retail Price by Sub-Region

The West South Central sub-region had the lowest average retail price at $.73, up 1%.

All sub-regions average retail price decreased, with the exception of three; East North Central (5%), Mountain (1%), and West South Central (1%).

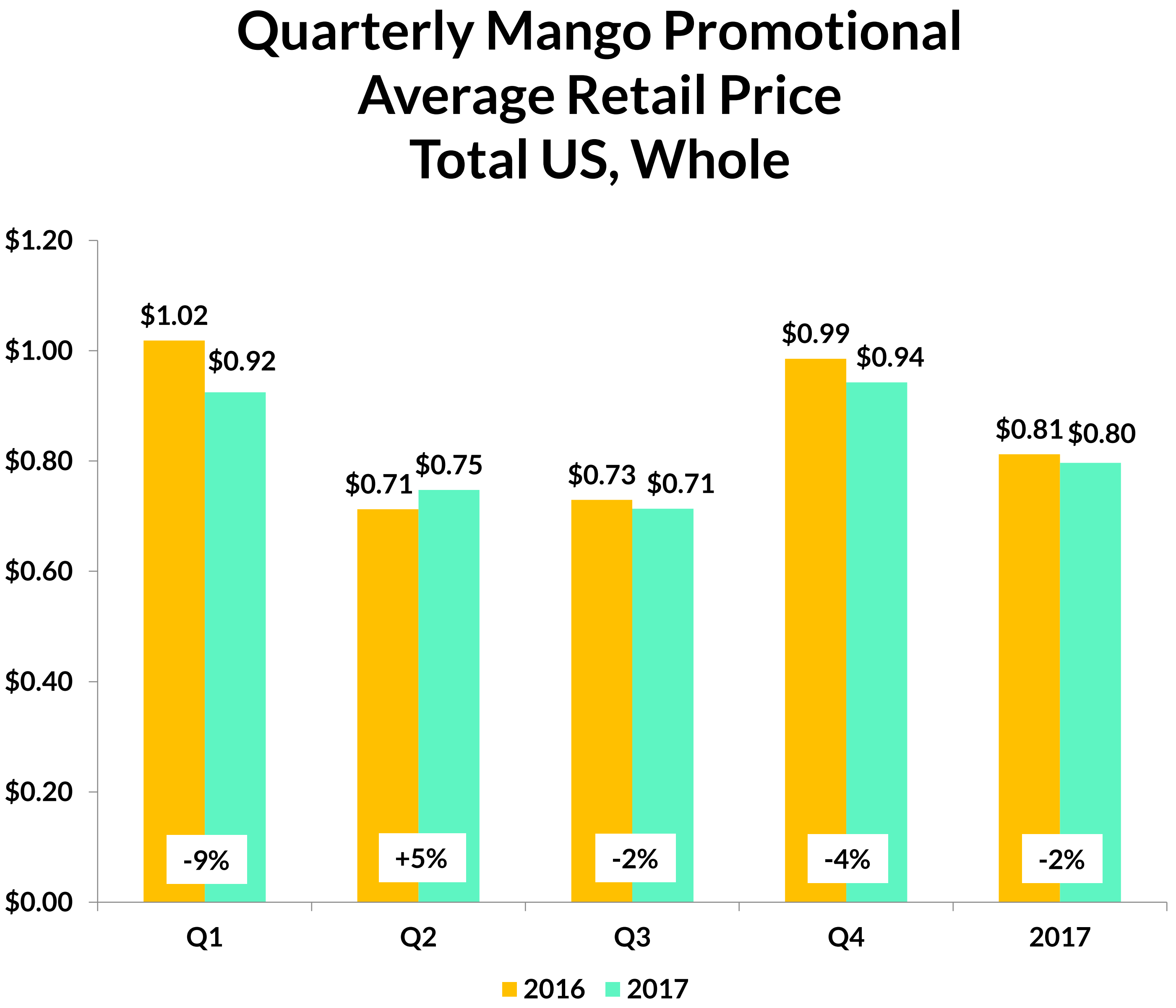


Source: Nielsen FreshFacts® 2017 vs YAGO

Quarterly Promotional Retail Price

Overall decrease in promotional average retail price was 2% to $.80.

Promotional average retail price declined in all quarters except Q2, which had an increase of 5%.

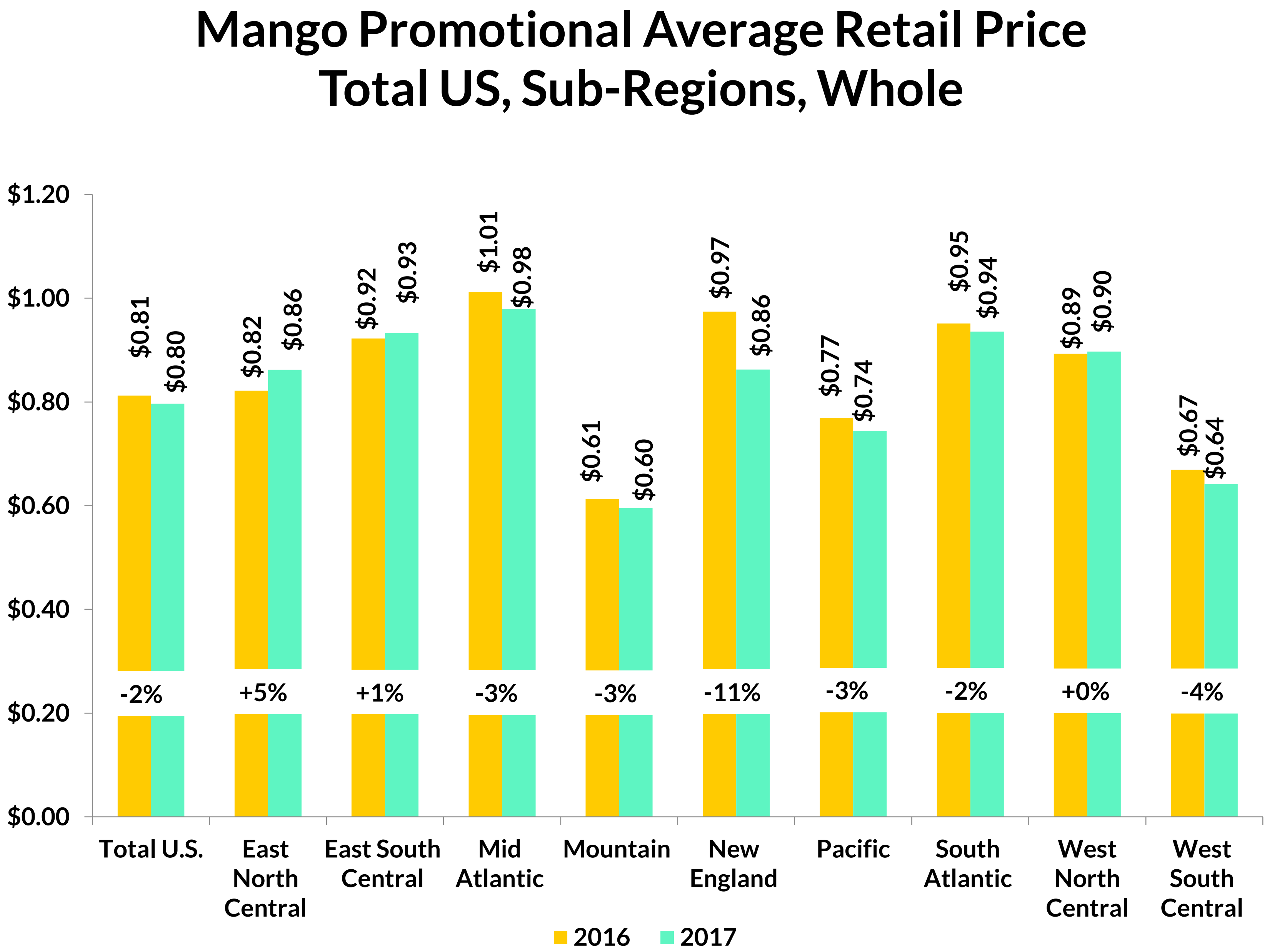


Source: Nielsen FreshFacts® 2017 vs YAGO

Promotional Retail Price by Sub-Region

East North Central sub-region had the largest promotional average retail price growth, up 5% to $.86.

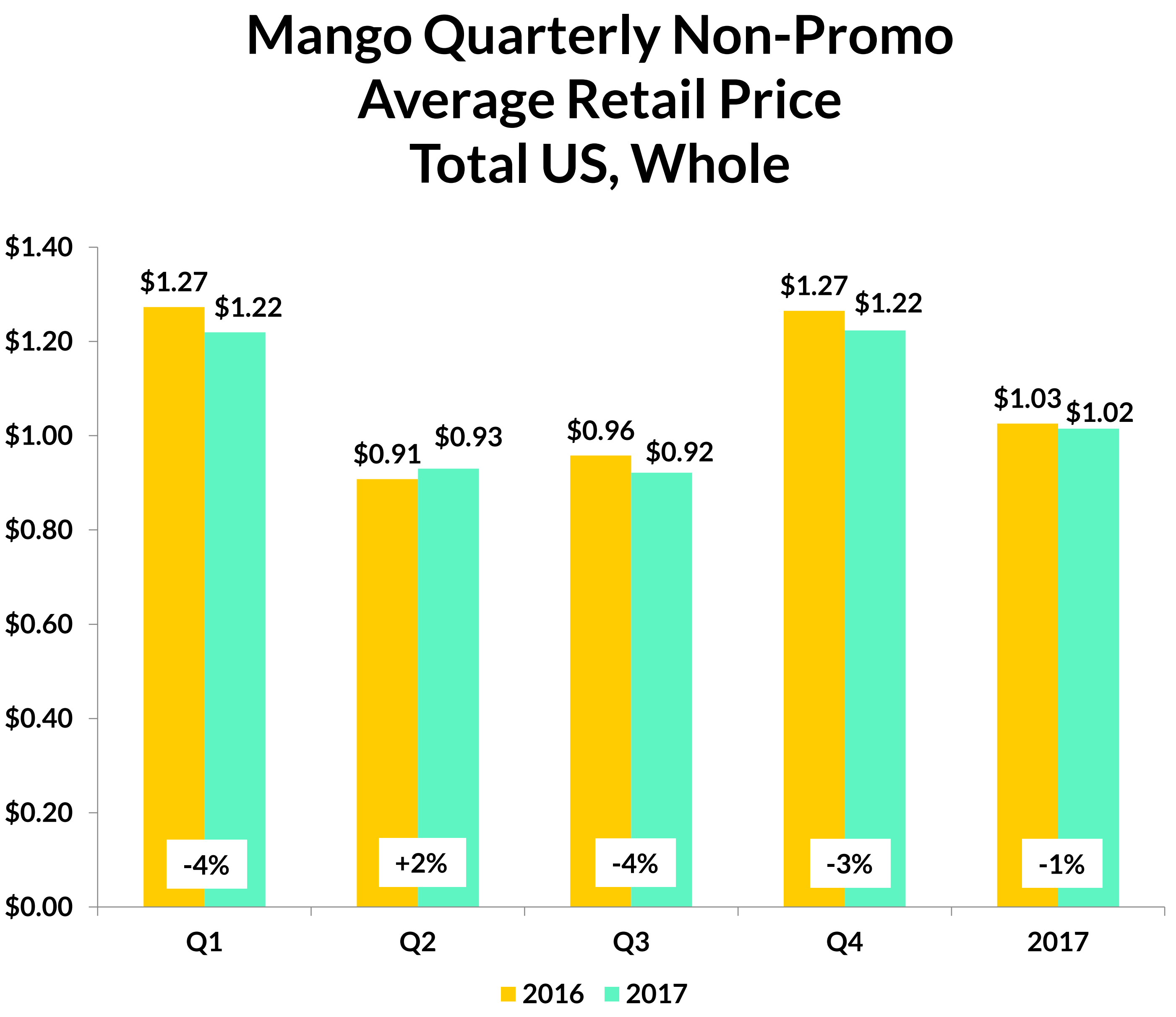
New England sub-region had the largest decline of 11%, to $.86.



Source: Nielsen FreshFacts® 2017 vs YAGO

Quarterly Non-Promo Retail Price

Non-promo average retail price declined in all quarters except Q2 which saw a slight increase of 2%.

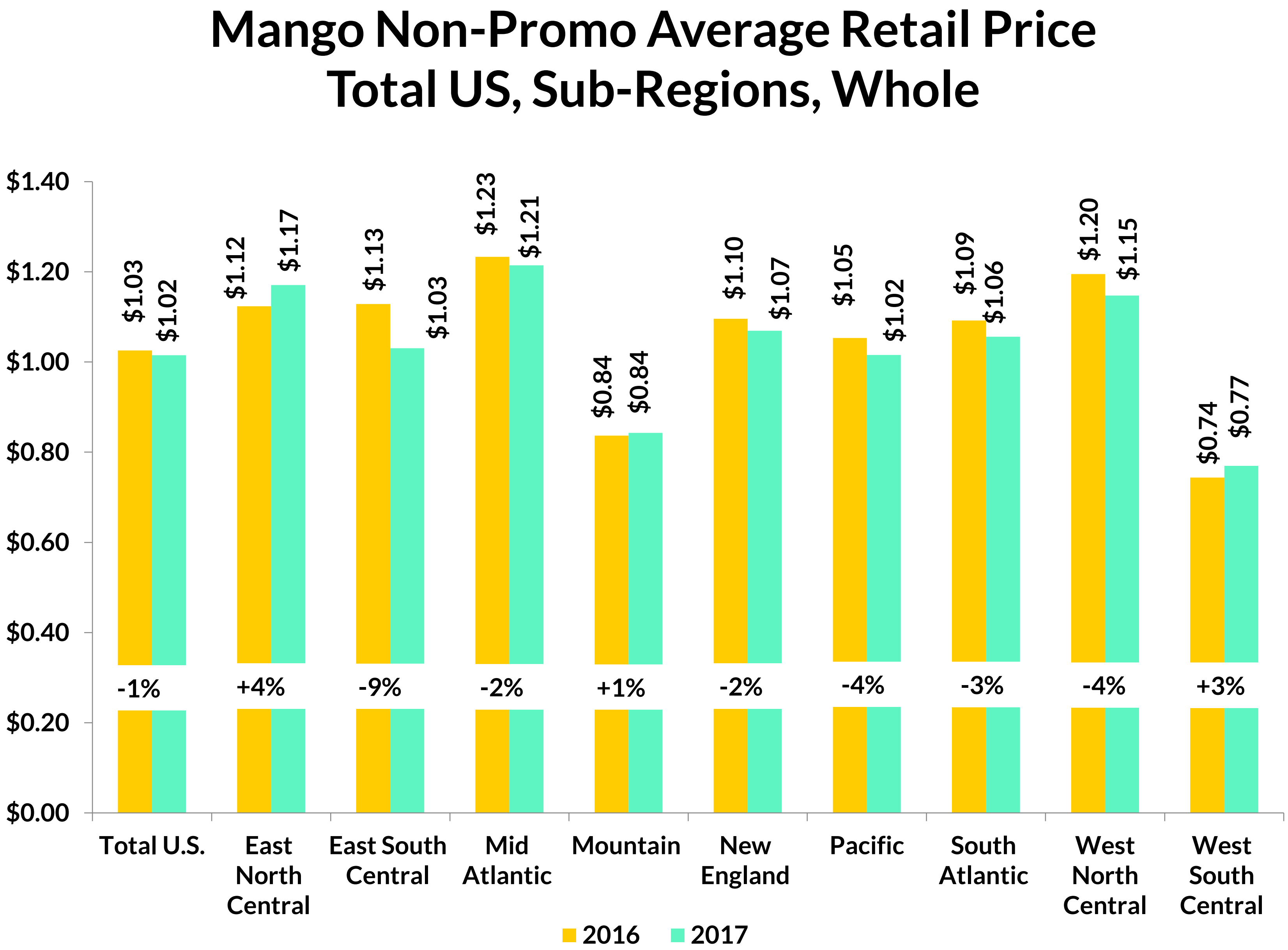


Source: Nielsen FreshFacts® 2017 vs YAGO

Non-Promo Retail Price by Sub-Region

Only East North Central (4%), West South Central(3%)and Mountain (1%) sub-regions increased in average non-promo retail prices.

Although the West South Central had the lowest non-promoted average retail price at $.77, it grew by 3% from the prior year.



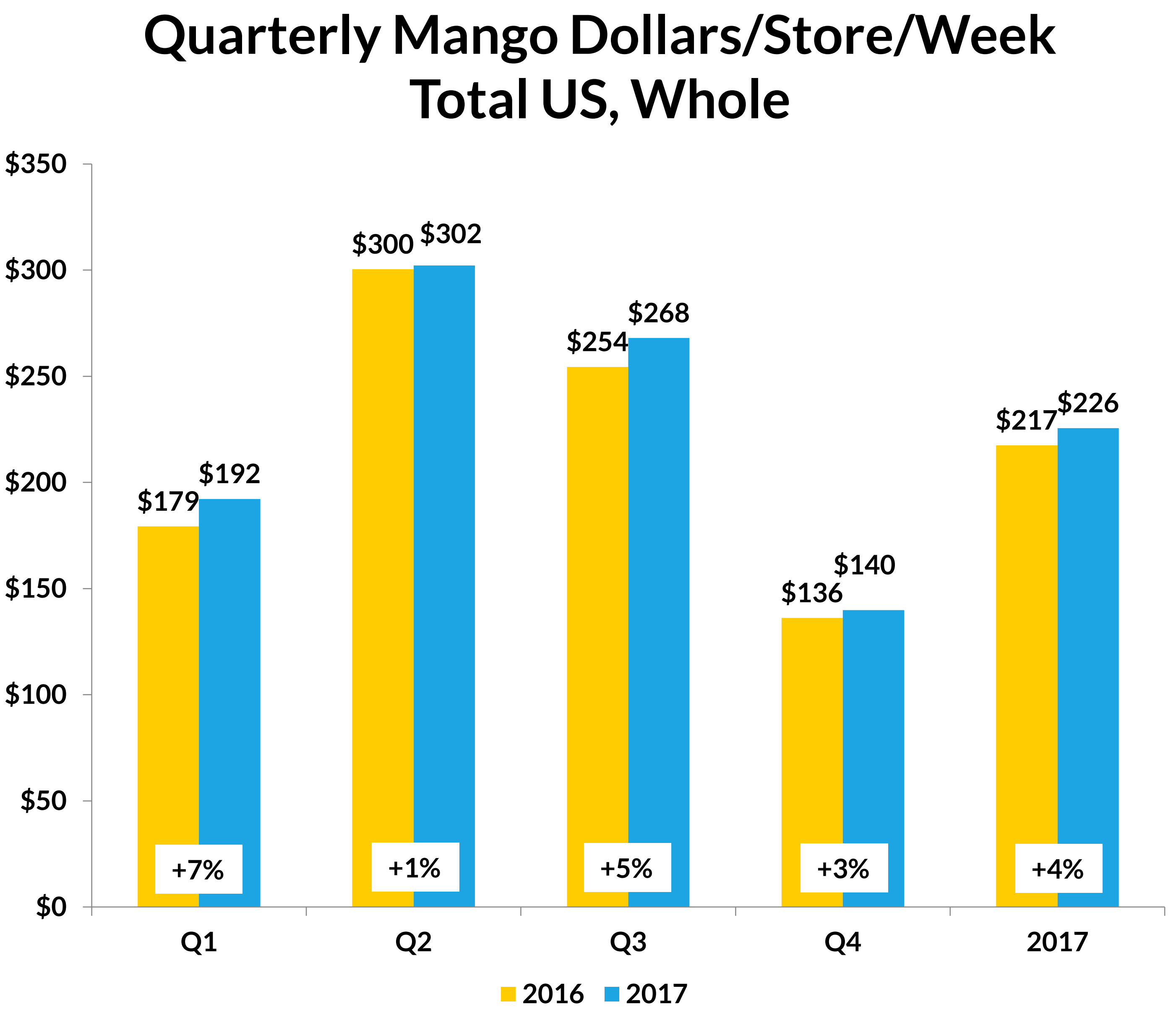
Source: Nielsen FreshFacts® 2017 vs YAGO

Quarterly Dollars/Store/Week

Dollars/store/week increased 4% to $226.

Dollars peaked during Q2 at $302/store/week, a 1% increase from prior year.

These results are aligned with the typical seasonal trends for mango dollars.

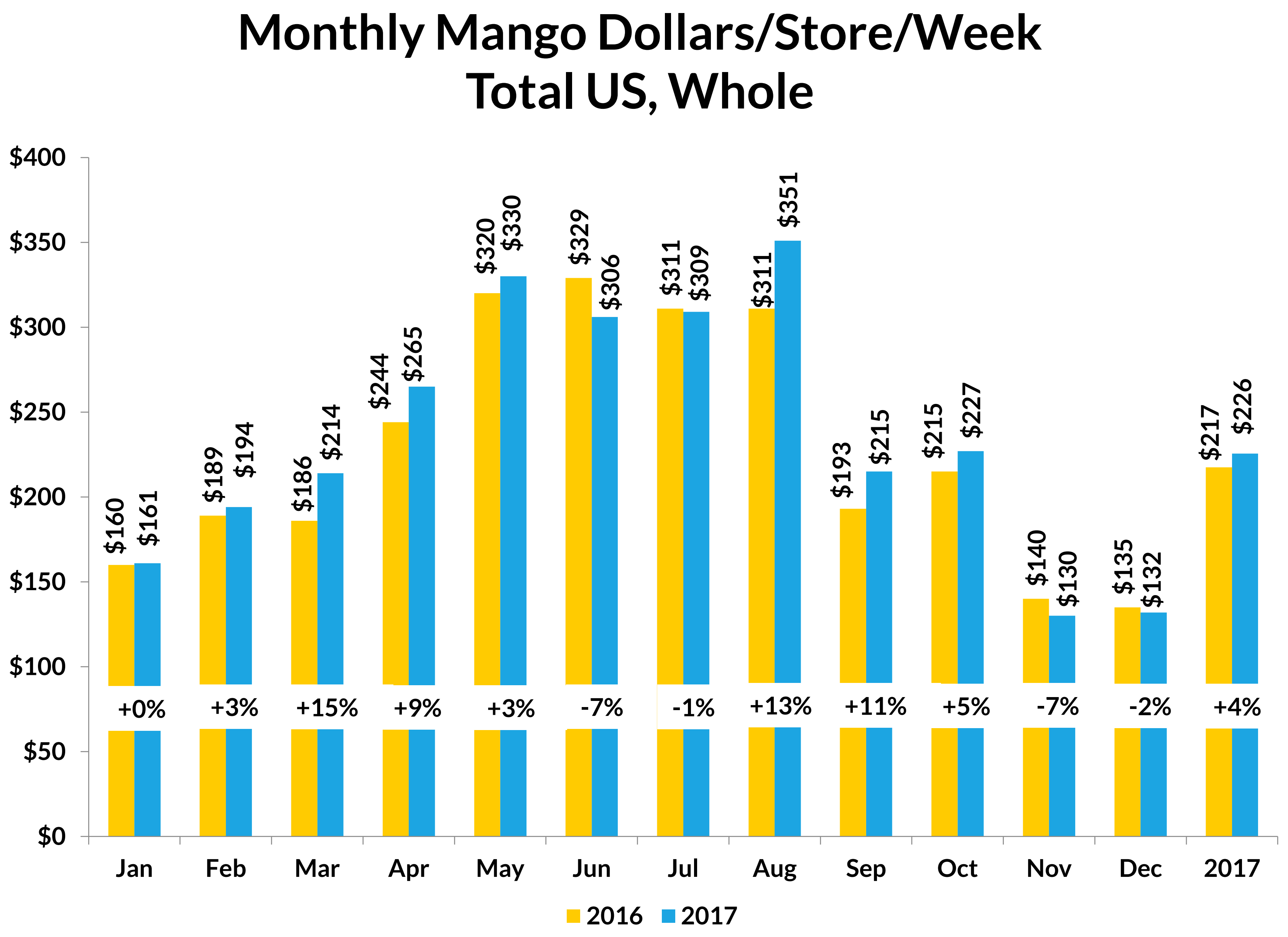


Source: Nielsen FreshFacts® 2017 vs YAGO

Monthly Dollars/Store/Week

August had the highest dollar velocity with $351 mangos sold /store/week.

March (+15%), August (+13%) and September (+11%) had largest increases in dollar velocity.



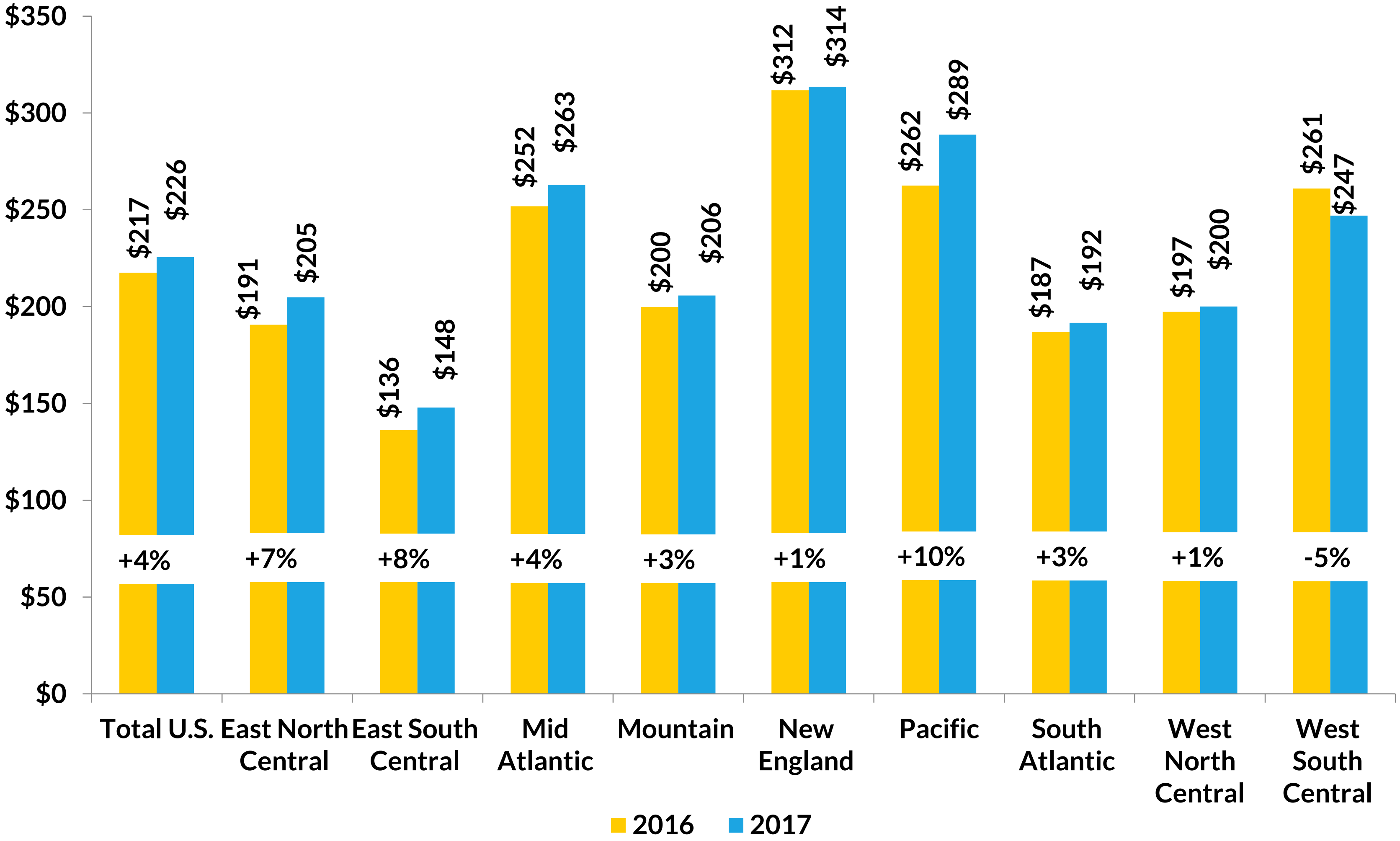
Source: Nielsen FreshFacts® 2017 vs YAGO

Dollars/Store/Week by Sub-Region

The top three sub-regions based on dollars/store/week in 2017 were New England ($314), Pacific ($289) and Mid Atlantic ($263).

West South Central was the only sub-region to decrease mango dollars/store/week, down 5%, but still remained in the top four sub-regions.

Mango Dollars/Store/Week Total US, Sub-Regions, Whole

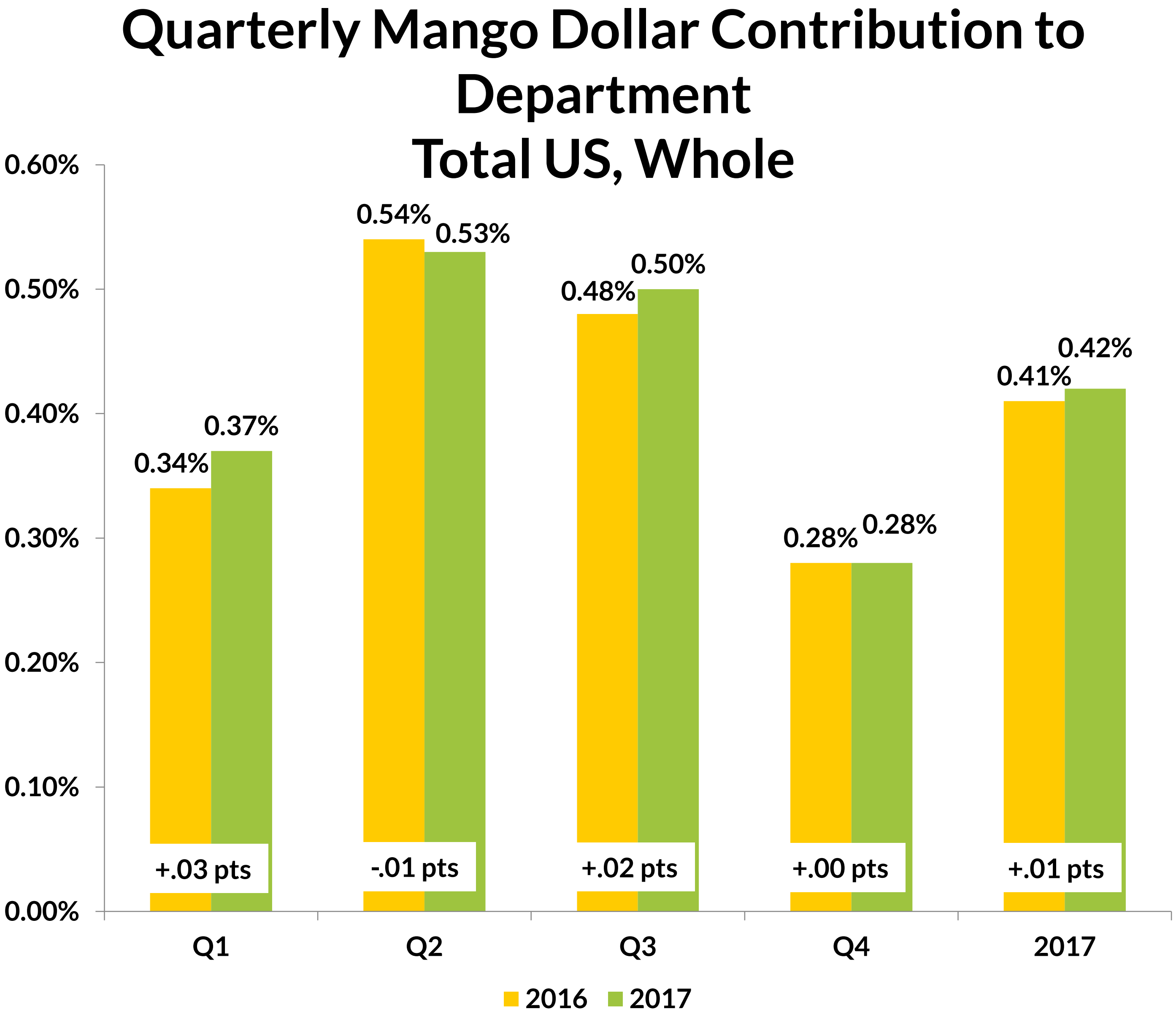


Source: Nielsen FreshFacts® 2017 vs YAGO

Contribution to Department Sales

Overall, mango dollar contribution to the produce department increased marginally compared to the prior year.

The peak mango contribution to the department was during Q2 (.53%) and the lowest contribution was during Q4 (.28%).



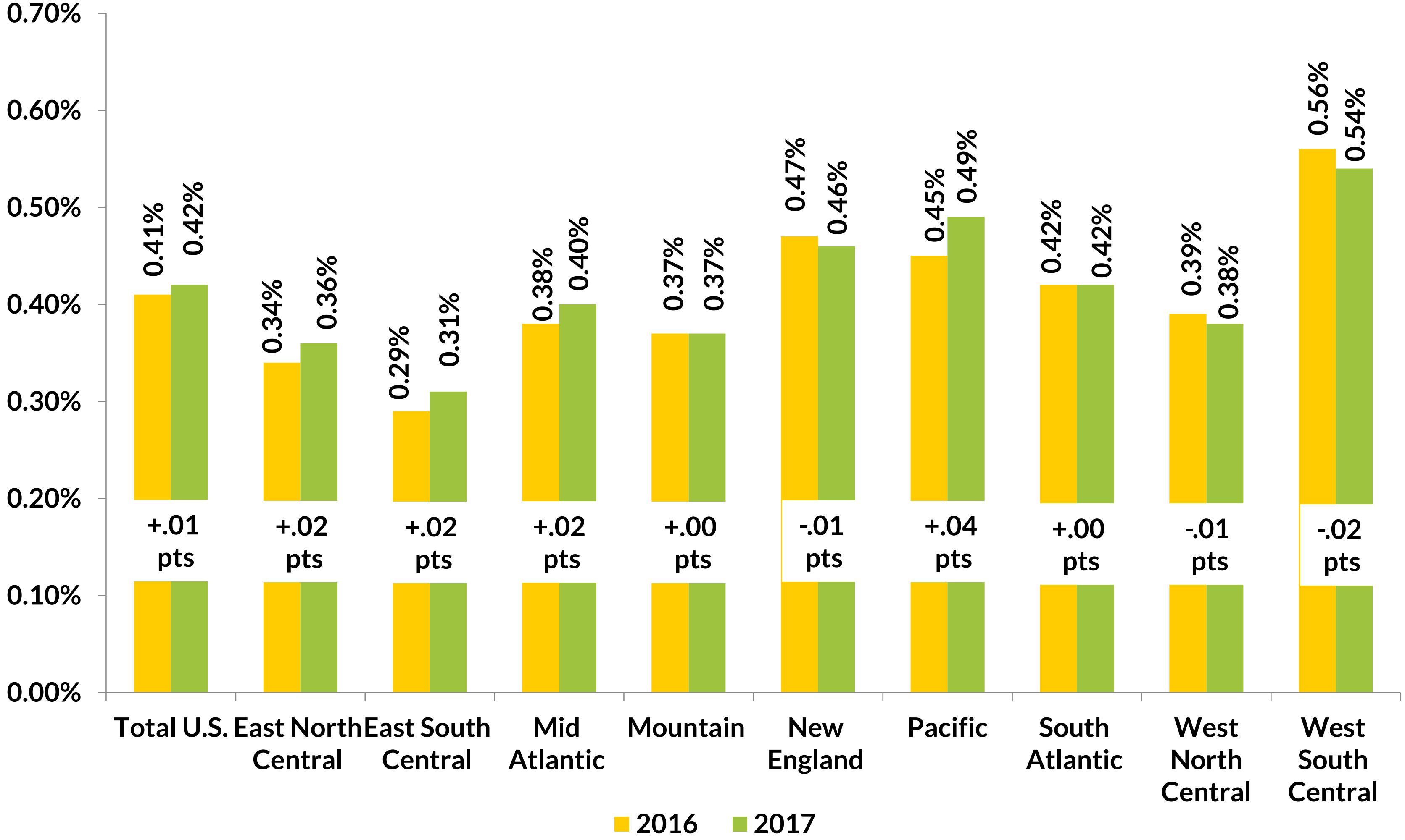
Source: Nielsen FreshFacts® 2017 vs YAGO

Dollar Contribution to Produce by Sub-Region

Although the West South Central sub region had the largest dollar contribution to produce at .54% the region declined by .02 pts from prior year.

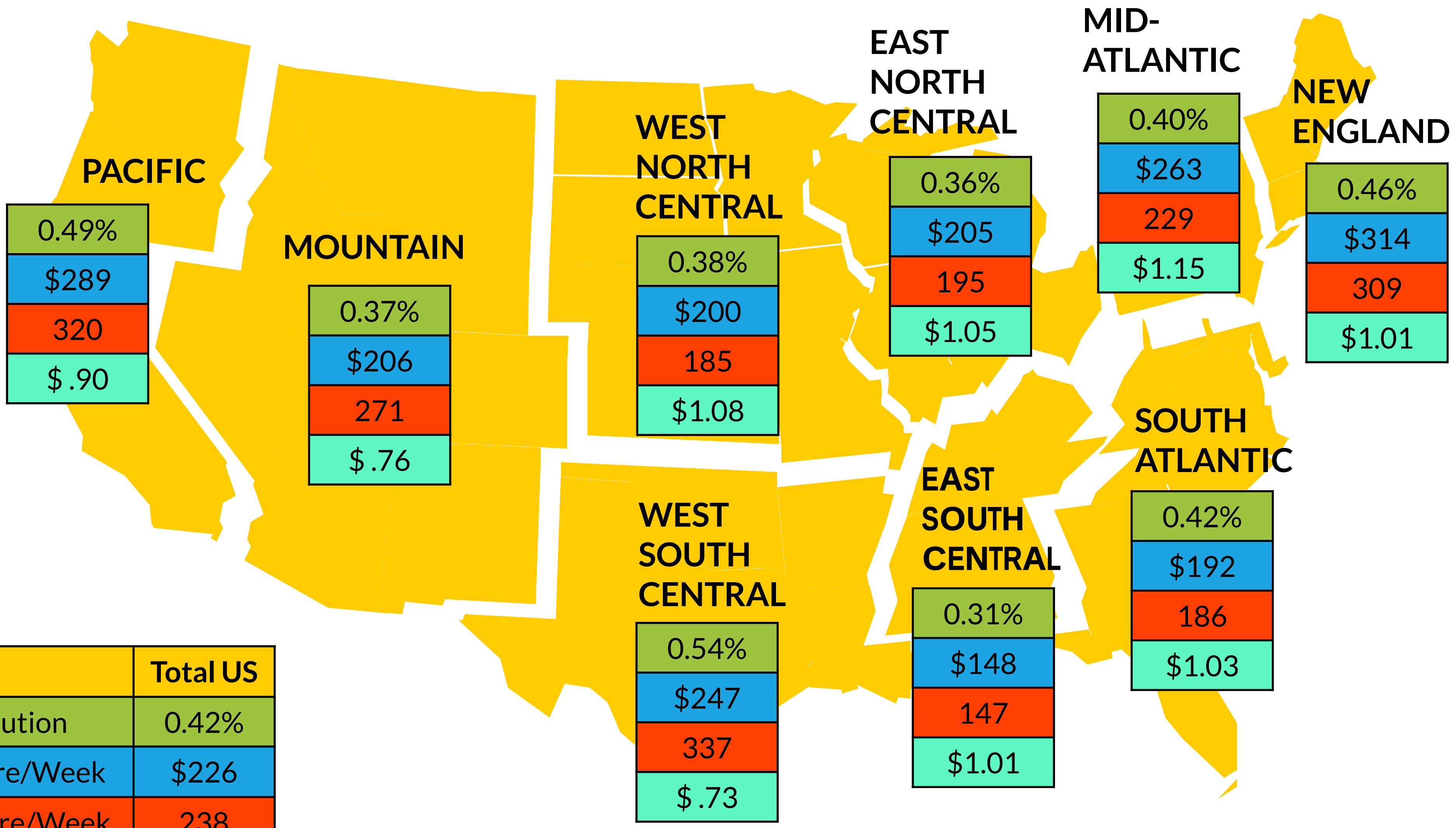
Mango dollar contribution grew the most in the Pacific sub-region, up .04 points.

Mango Dollar Contribution to Department Total US, Sub-Regions, Whole



Source: Nielsen FreshFacts® 2017 vs YAGO

Mango Performance by Sub-Region



Legend	Total US
Dollars Contribution	0.42%
Dollars per Store/Week	$226
Volume per Store/Week	238
Average Retail Price	$0.95

Source: Nielsen FreshFacts® 2017 vs YAGO

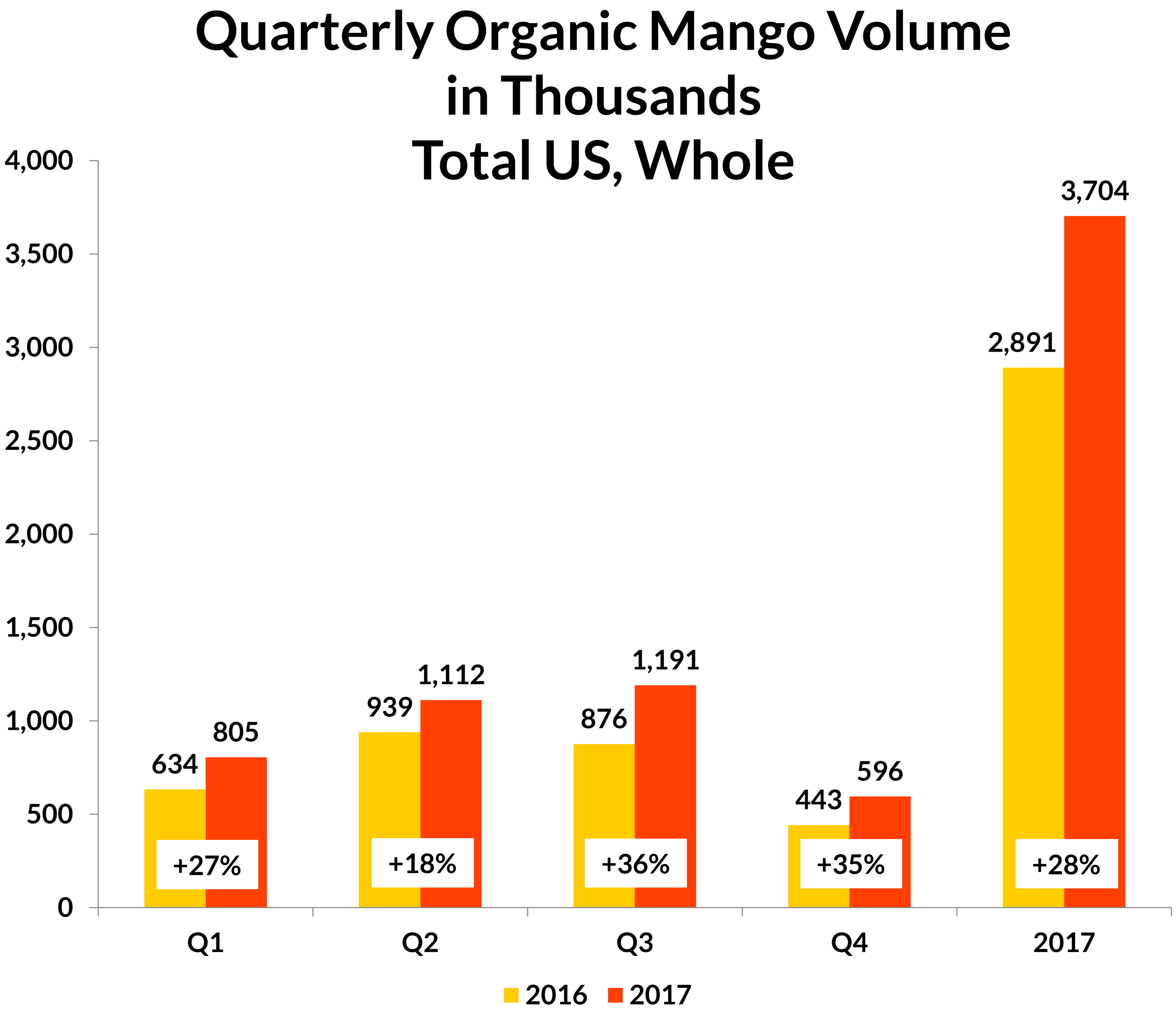
Organic Mango Performance 2017

Quarterly Organic Volume

Organic mango volume movement was up 28%.

Similar to whole mangos, organic mangos follow a seasonal volume trend peaking in Q2 and Q3, with lower volumes in Q1 and Q2.

All four quarters had substantial increases in organic mango volume. The largest increases were in Q3 (+36%) and Q4 (+35%)

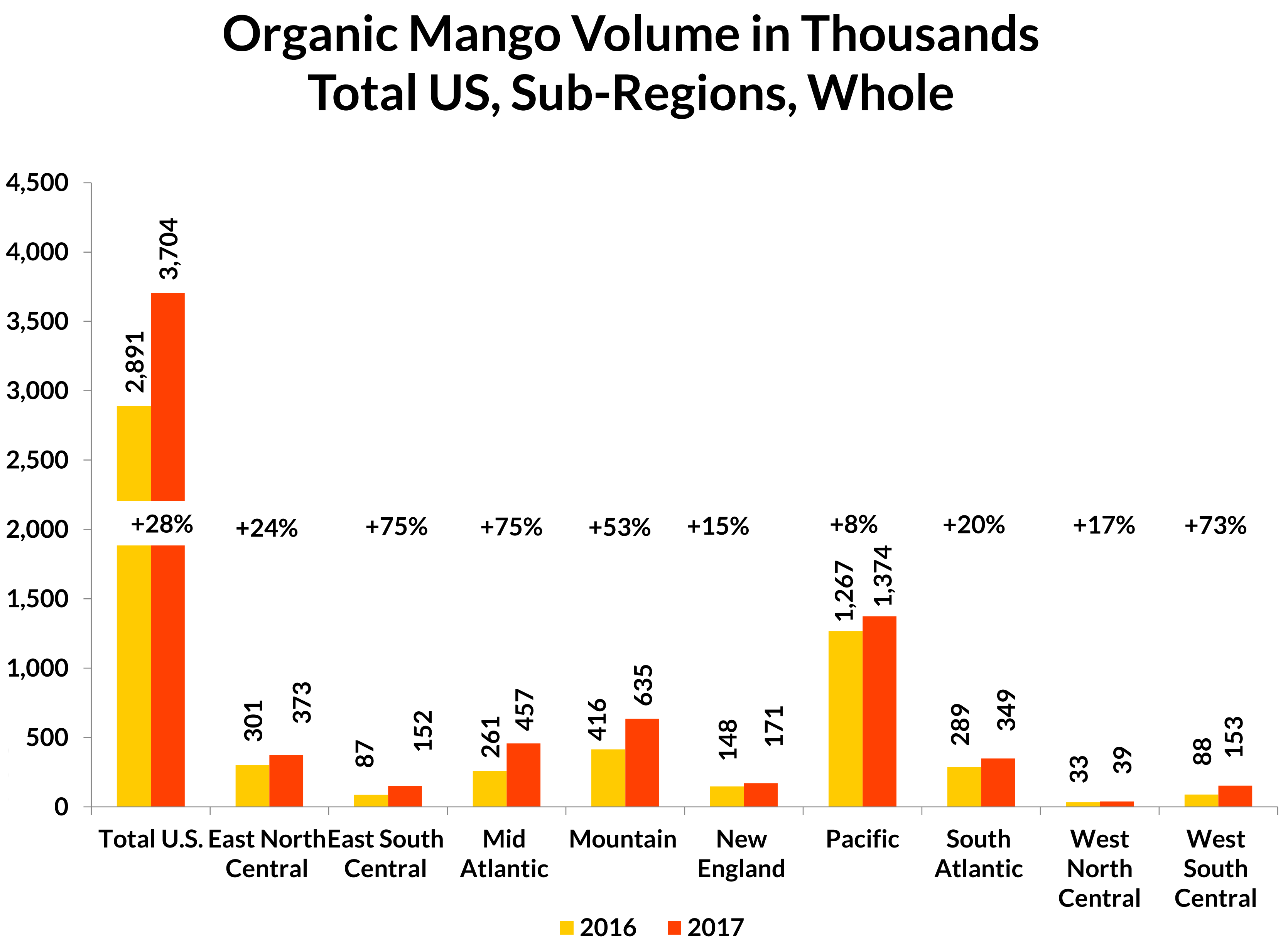


Source: Nielsen FreshFacts® 2017 vs YAGO

Organic Volume by Sub-Region

The Pacific sub-region moved more than a third of total organic mango volume.

All other sub-regions showed a double digit increase in organic mango volume, with the largest increases in East South Central and Mid Atlantic (+75% each), West South Central (+73%) and Mountain (+53%) sub regions.

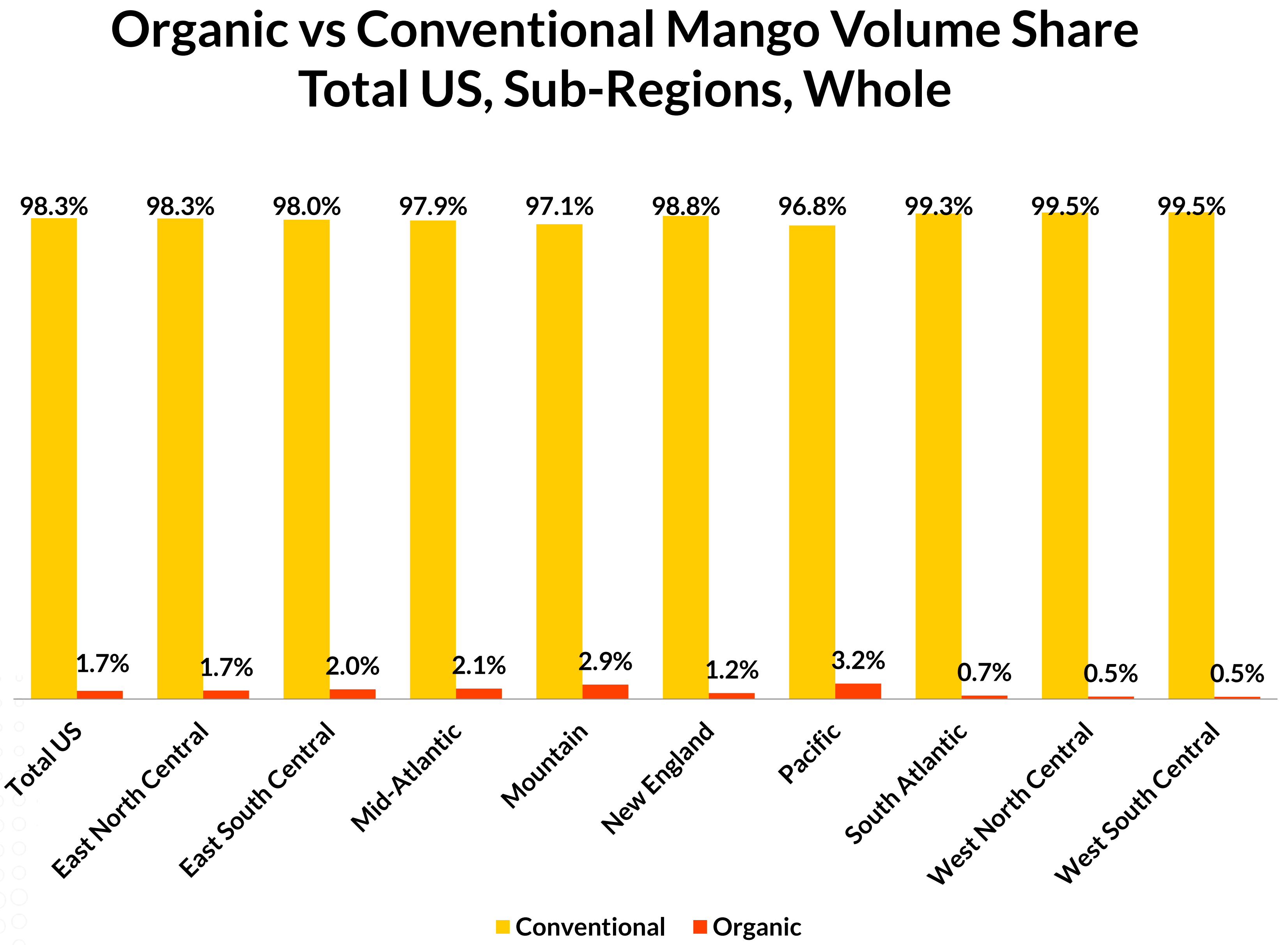


Source: Nielsen FreshFacts® 2017 vs YAGO

Organic/Conventional Volume Share by Sub-Region

Organic mangos continue to be a very small part of the overall mango volume.

Organic mango share of volume ranges from a a high of 3.2% in the Pacific sub region to a low of .5% in the West North Central and West South Central sub regions.

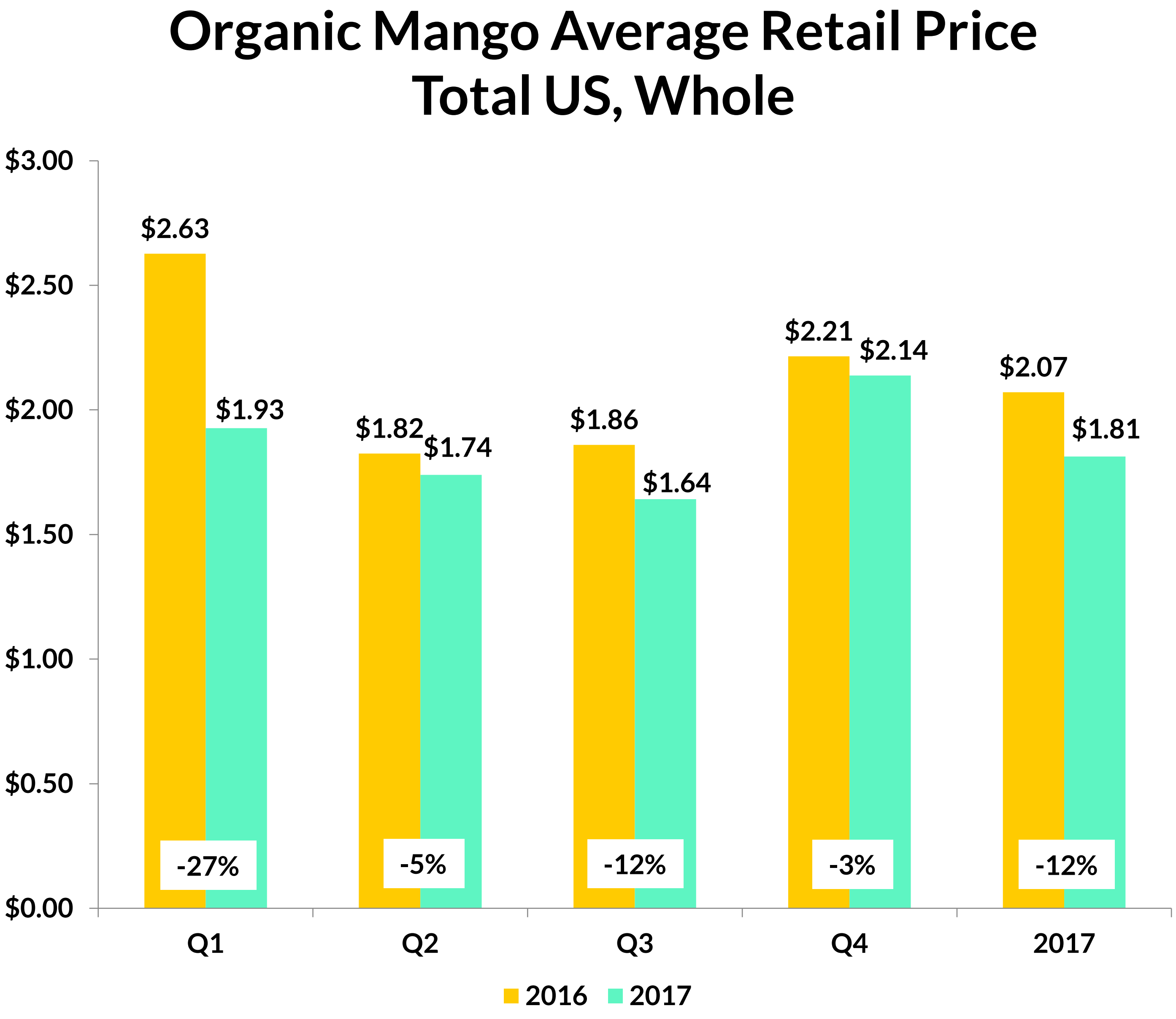


Source: Nielsen FreshFacts® 2017 vs YAGO

Organic Average Retail Price

The average price for organic mangos decreased by 12%. Average prices were less than prior year in all four quarters.

In Q1, the average retail price for organic mangos decreased 27%, to $1.93.

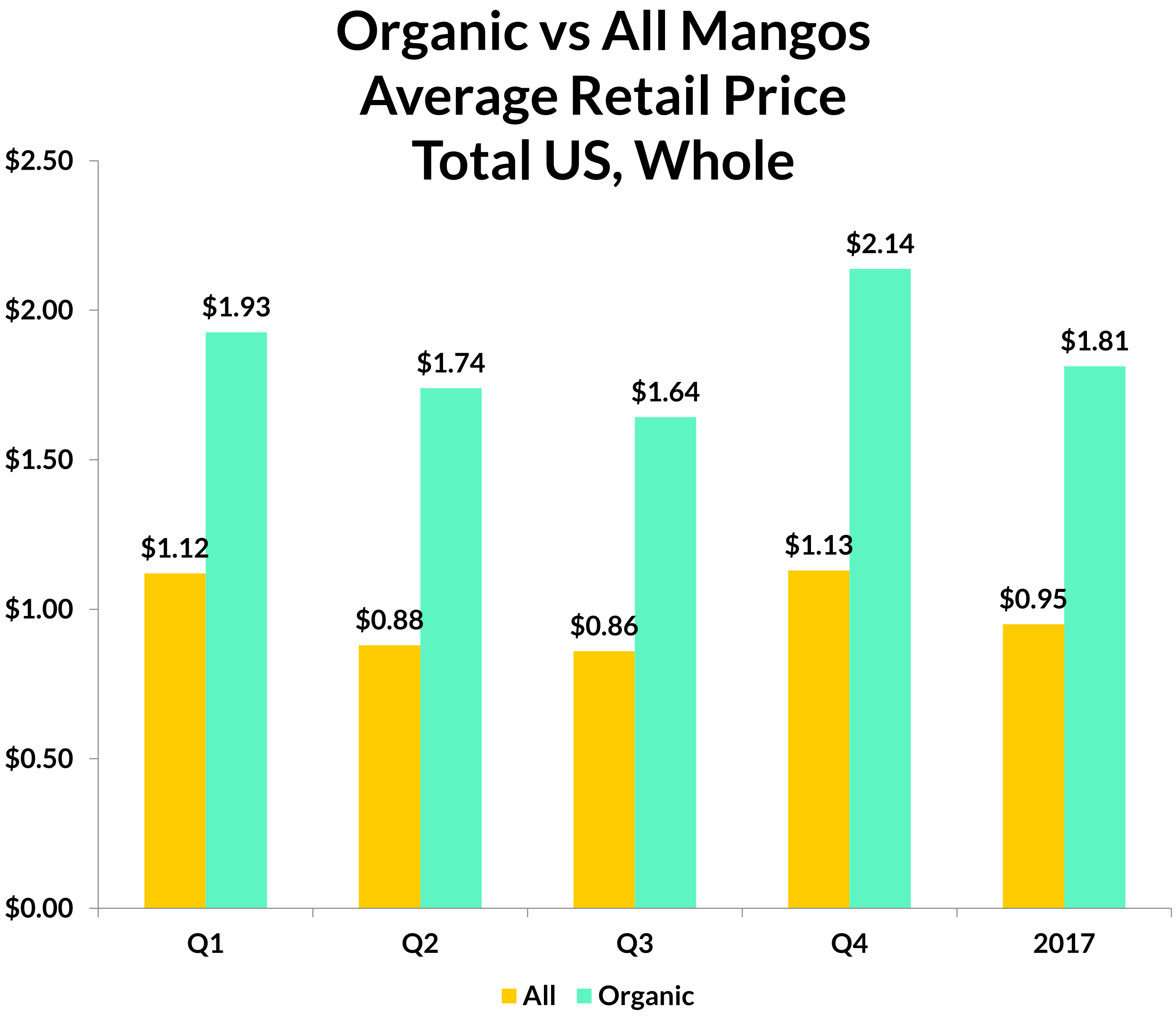


Source: Nielsen FreshFacts® 2017 vs YAGO

Organic vs All Mangos Retail Price

Organic mangos were priced nearly 2x times higher than all mangos.

The largest difference in price occurred during Q4 2017 with a $1.01 difference between organic mangos and all mangos.



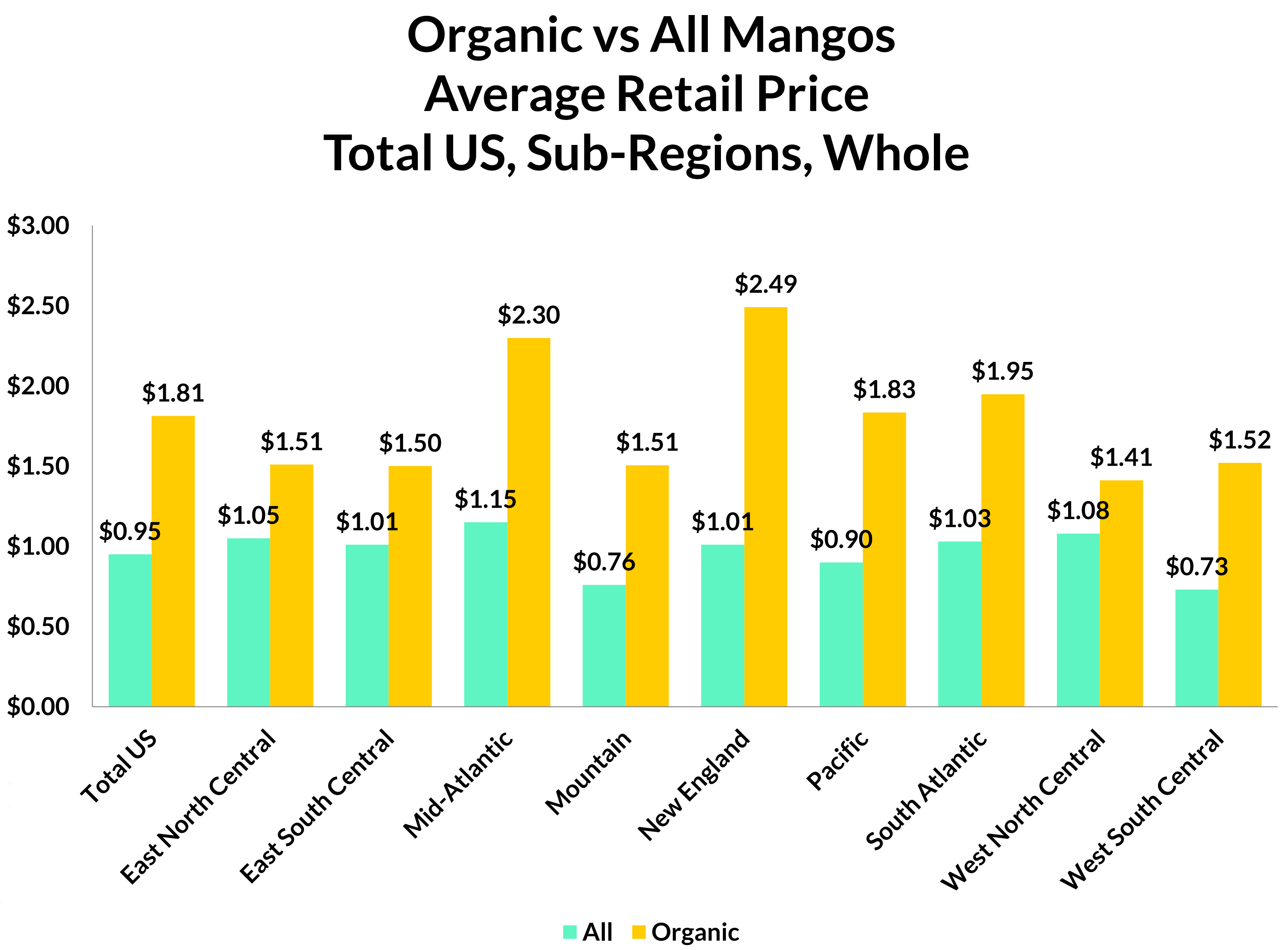
Source: Nielsen FreshFacts® 2017 vs YAGO

Organic vs All Mangos Retail Price by Sub-Region

New England had the highest retail price for organic mangos at $2.49, followed by Mid-Atlantic at $2.30.

Mid-Atlantic was also the only sub-region to have conventional mangos selling for over $1.00 each.

New England had the largest spread between organic and all mangos, a difference of $1.48.



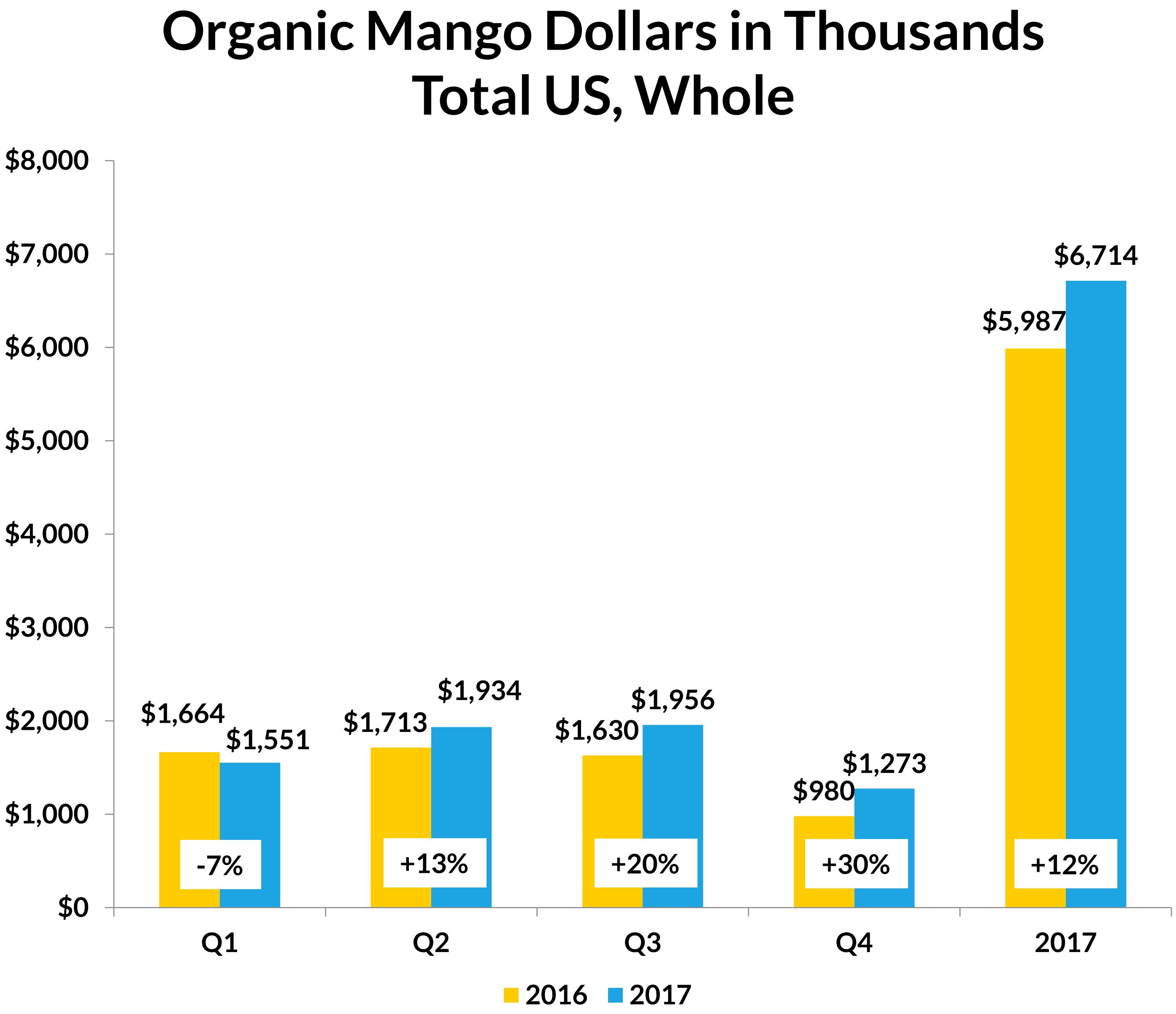
Source: Nielsen FreshFacts® 2017 vs YAGO

Organic Dollars

Organic mango dollar sales were up 12% compared to prior year.

Q1 had a decrease of 7% in organic mango dollars.

The other three quarters showed an increase.

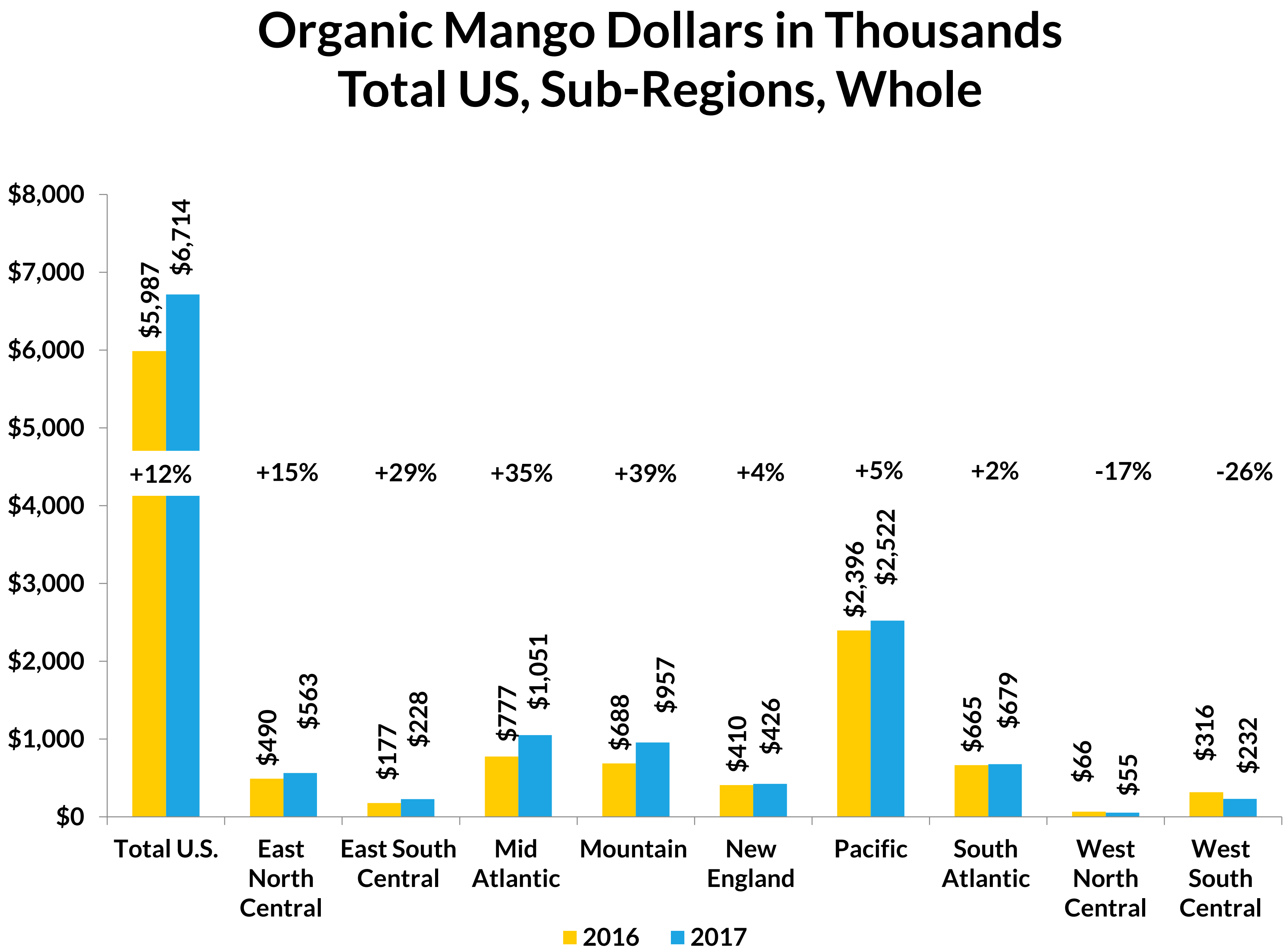


Source: Nielsen FreshFacts® 2017 vs YAGO

Organic Dollars by Sub-Region

The Pacific sub-region had the strongest sales and also increased by 5% compared to the prior year.

Two regions had declines in organic dollars. These were West South Central (-26%) and West North Central (-17%)



Source: Nielsen FreshFacts® 2017 vs YAGO

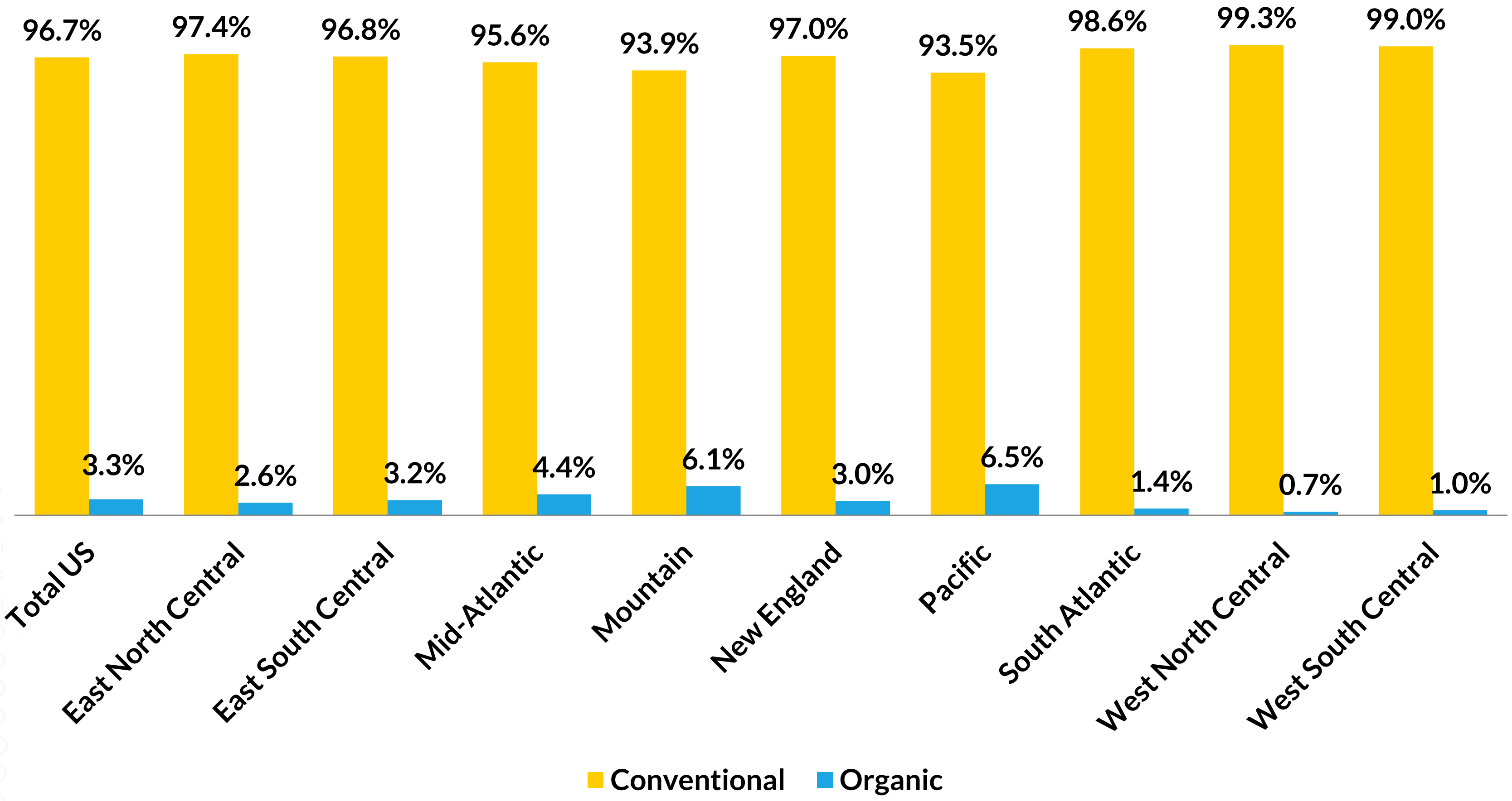
Organic/Conventional Dollar Share by Sub-Region

Organic mangos were 3.3% of total mango dollars.

Organic mangos had the largest dollar share in Pacific (6.5%) and Mountain (6.1%) sub-regions.

The smallest dollar share for organic mangos was in the West North Central (.7%) sub region.

Organic vs Conventional Mango Dollar Share Total US, Sub-Regions, Whole



Source: Nielsen FreshFacts® 2017 vs YAGO

Fresh Cut Mango Performance 2017

Fresh Cut Fruit Dollars and Contribution

Fresh cut mangos increased 11.4% in dollars/store/week, and remained in the 6th position in the fresh cut fruit ranking.

Each of the items listed are that fruit only (Mango only, Pineapple only, etc.) unless specified as “mixed”.

Throughout this report, “fresh cut mango” refers to mango only items.

Fresh Cut Fruit Sales and Contribution

	RANK	DOLLARS /STORE/WEEK	% CHANGE VS YAGO	DOLLAR CONTRIBUTION	% CHANGE VS YAGO
Fresh Cut Fruit		$2,110	0.4%	4.0%	0.9%
Mixed Fruit	1	$773	0.6%	1.5%	1.1%
Pineapple	2	$348	1.6%	0.7%	2.1%
Watermelon	3	$330	-3.5%	0.6%	-3.1%
Apples	4	$265	-4.1%	0.5%	-3.7%
Cantaloupe	5	$106	-4.4%	0.2%	-4.0%
Mango Only	6	$71	11.4%	0.1%	16.6%
Strawberry	7	$52	14.4%	0.1%	14.9%
Mixed Melons	8	$48	-11.6%	0.1%	-11.2%
Other VA Fruit	9	$38	14.4%	0.1%	14.9%
Grapes	10	$27	9.0%	0.1%	9.5%
Mango Mix	11	$26	47.6%	0.0%	48.2%
Honeydew	12	$18	-9.4%	0.0%	-9.0%
Orange	13	$1	150.5%	0.0%	151.0%
Papaya	14	$1	-38.8%	0.0%	-38.5%
Grapefruit	15	$0	-63.3%	0.0%	-63.1%
Peach	16	$0	-87.2%	0.0%	-86.8%
Pear	17	$0	-86.5%	0.0%	-86.0%

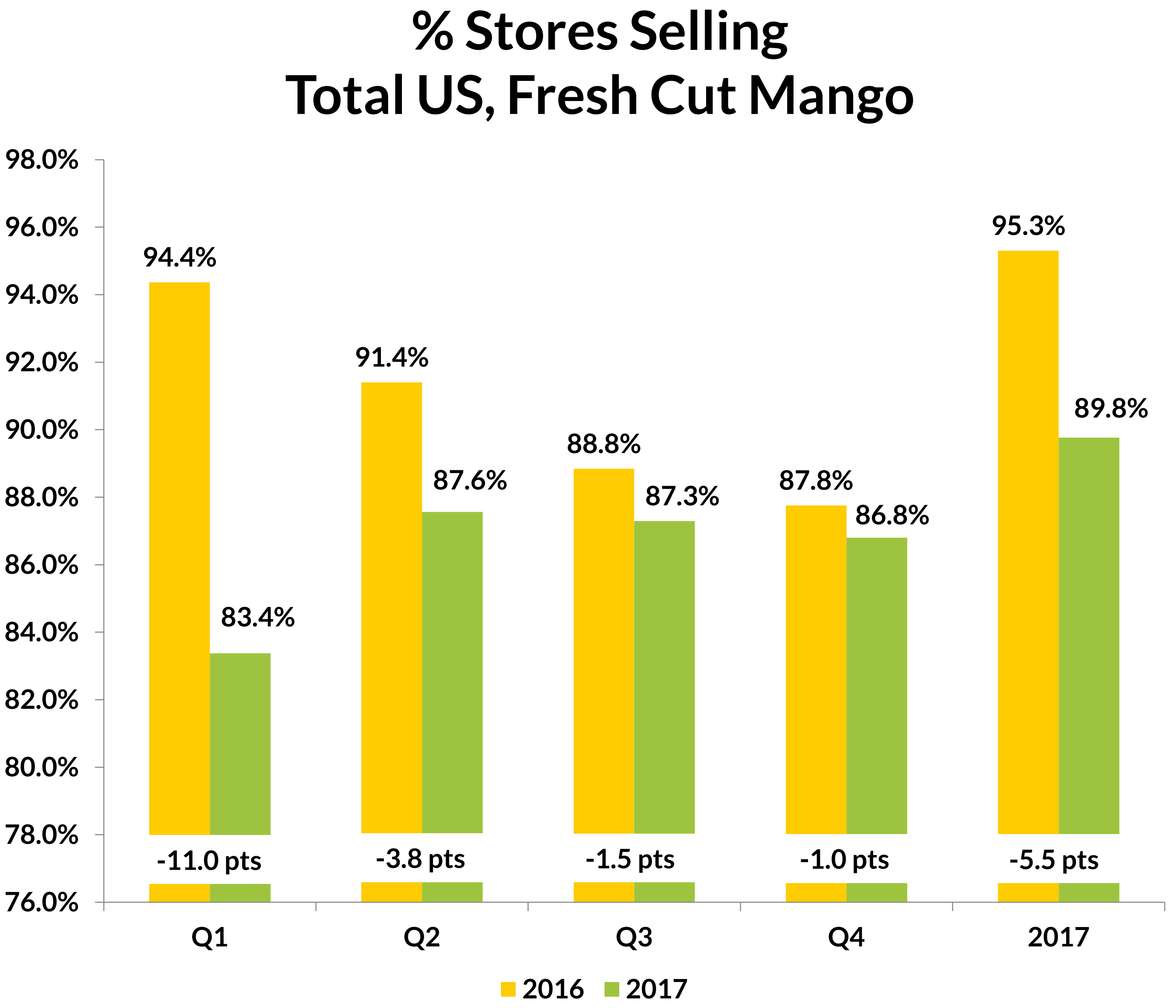
Source: Nielsen FreshFacts® 2017 vs. YAGO

Fresh Cut Mango % Stores Selling

The percentage of stores selling fresh cut mango declined 5.5 points, to 90%.

The percentage of stores selling declined in all four quarters.

The largest decline was 11 pts. in Q1.

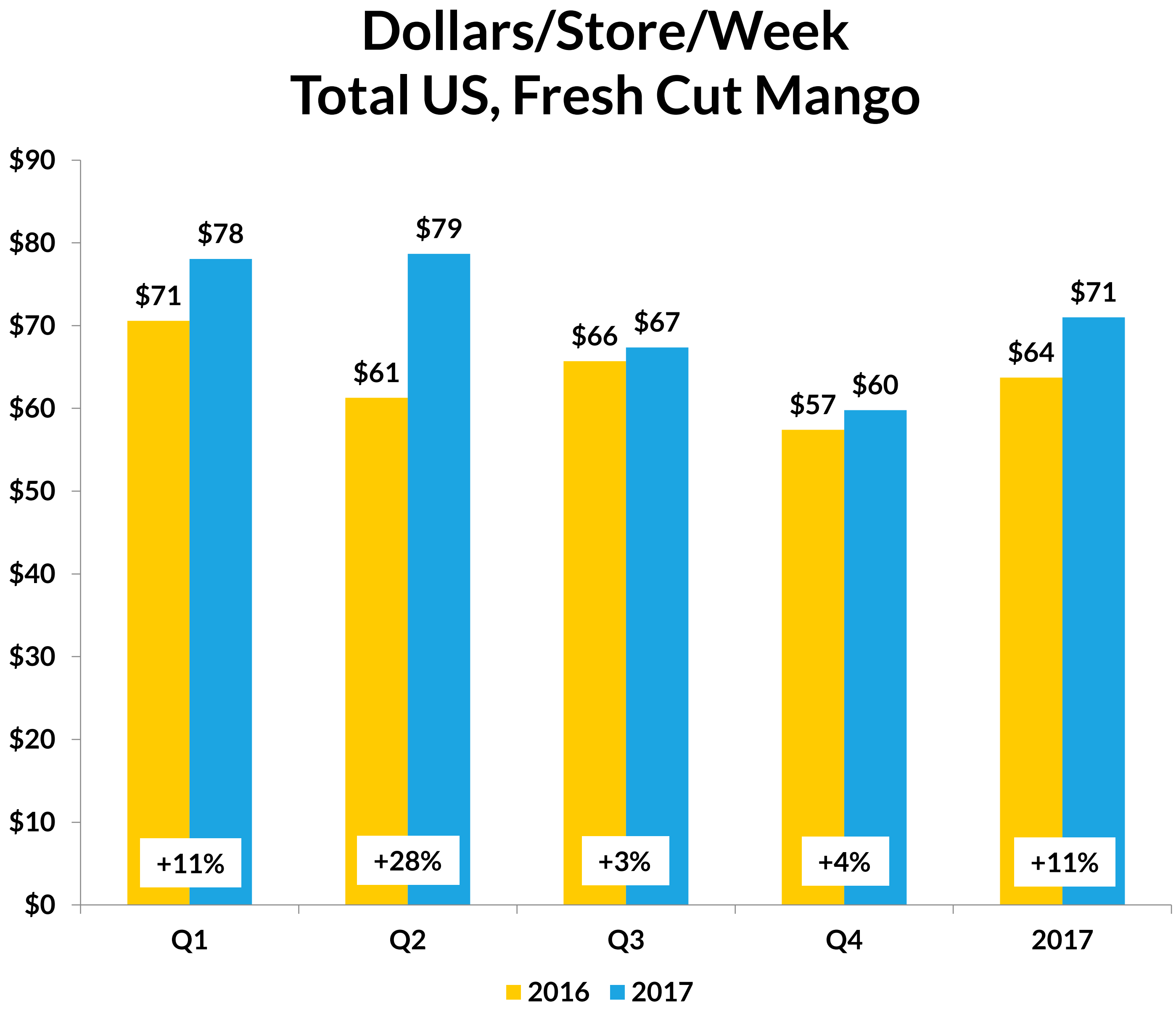


Source: Nielsen FreshFacts® 2017 vs YAGO

Fresh Cut Mango Dollars/Store/Week

Fresh Cut Mango dollars/store/week increased to $71 in 2017, up 11% from prior year.

Q2 reflected the largest increase (22%) at $79/store/week.

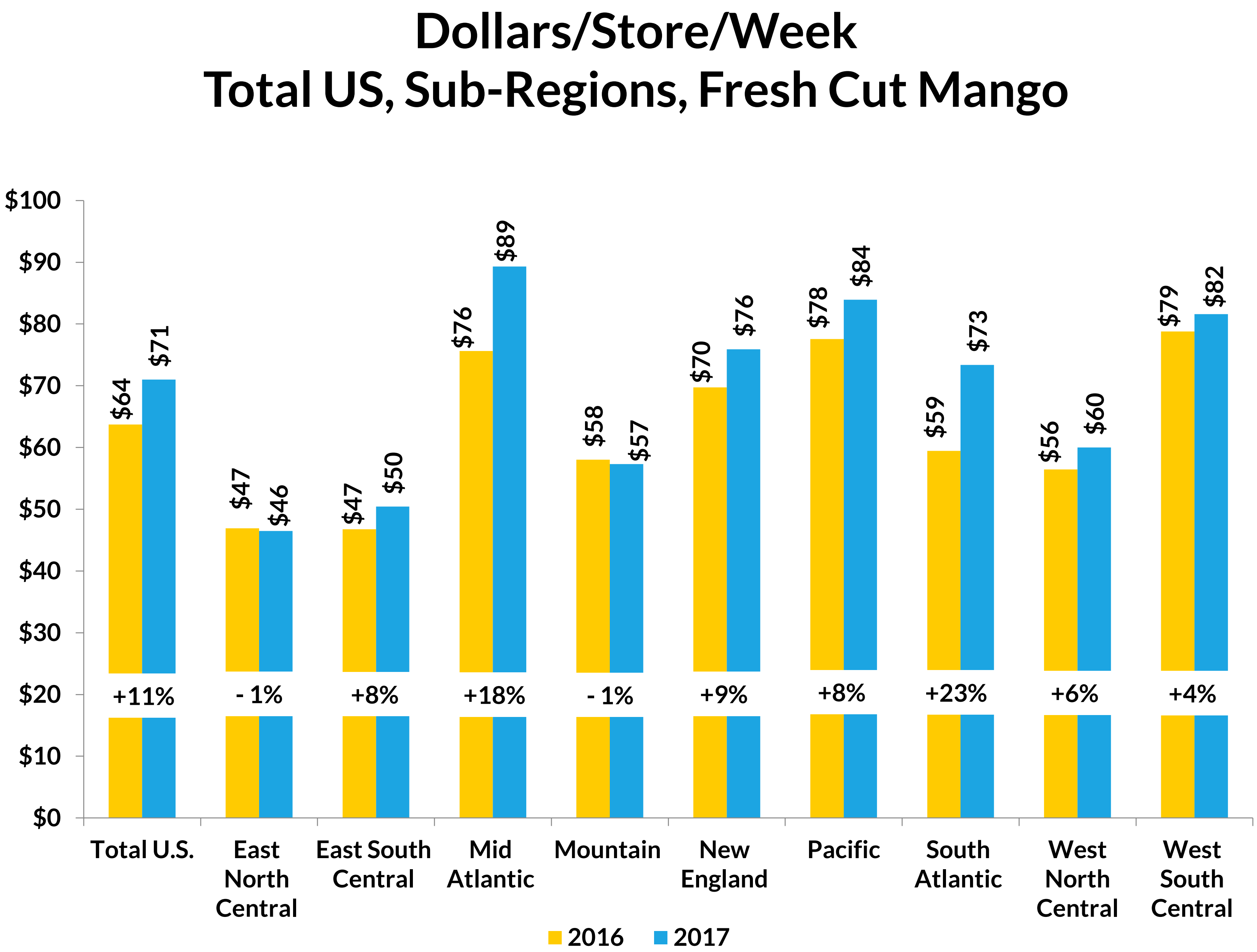


Source: Nielsen FreshFacts® 2017 vs YAGO

Fresh Cut Mango Dollars/Store/Week by Sub-Region

Mid-Atlantic sold the most fresh cut mango in dollars/store/week at $89, followed by Pacific at $84 and West South Central at $82.

Most sub-regions had increased sales, except for East North and Mountain (both down 1% over prior year).



Source: Nielsen FreshFacts® 2017 vs YAGO

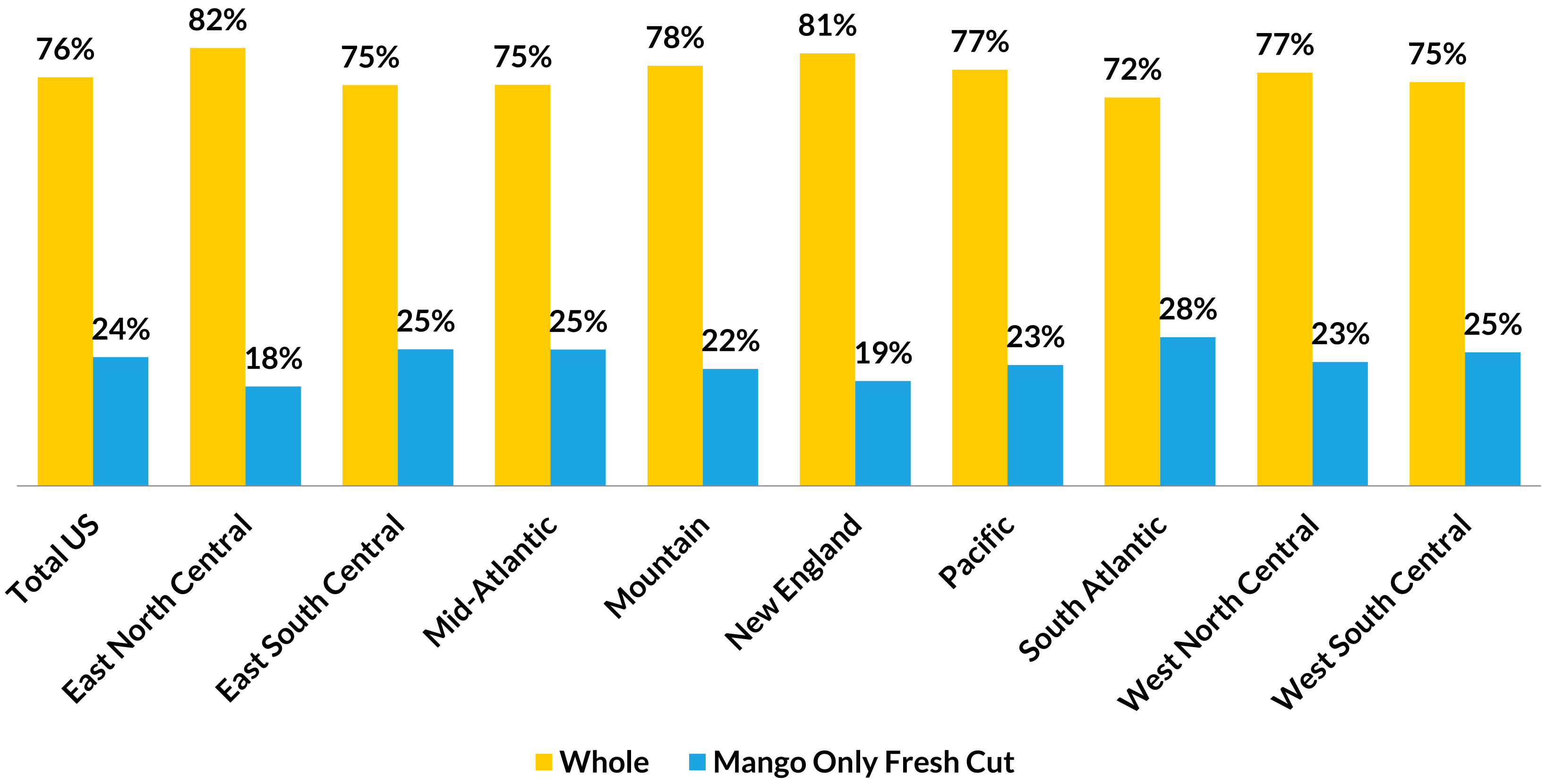
Fresh Cut vs Whole Mango Share by Sub-Region

In the universe of fresh cut and whole mangos combined, fresh cut contributes 24% of mango dollars.

South Atlantic sub region had the largest share of dollars/store/week with 28%.

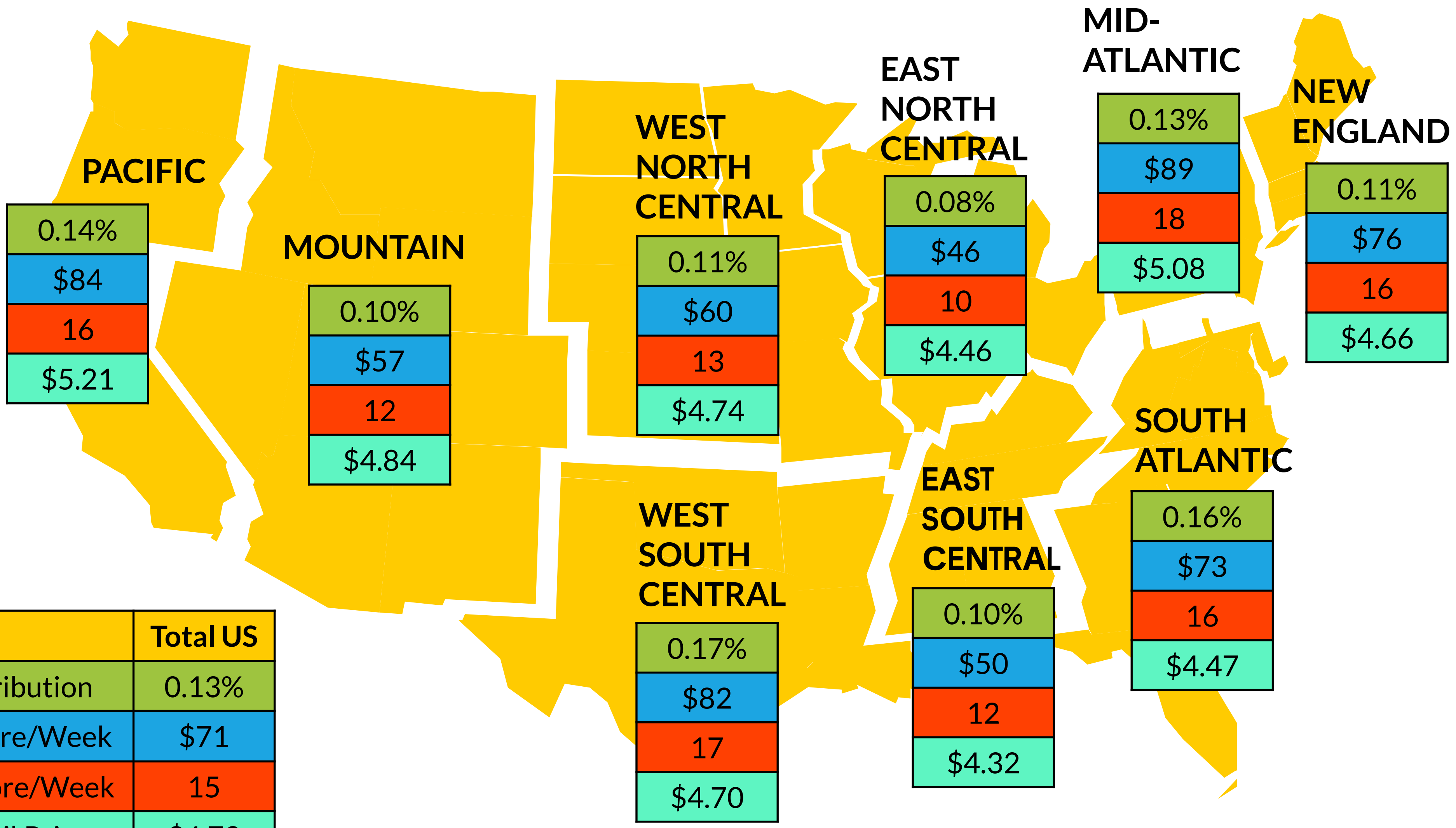
The East North Central sub-region had the lowest share at 18%.

Fresh Cut vs Whole Mango Share Total US, Sub-Regions



Source: Nielsen FreshFacts® 2017 vs YAGO

Fresh Cut Mango Performance by Sub-Region



Legend	Total US
Dollars Contribution	0.13%
Dollars per Store/Week	$71
Volume per Store/Week	15
Average Retail Price	$4.72

Source: Nielsen FreshFacts® 2017 vs YAGO

Approach and Data Parameters 2017

Approach and Data Parameters

In order to conduct this category review, Nielsen Perishables Group analyzed mango volume, pricing and sales to create a summary of 2017 retail performance.

Areas of focus:

- Overall category performance including volume, pricing, contribution to department and dollar sales.

- Category contribution and performance by category segment
  - Whole mango
  - Organic
  - Fresh cut

- Performance by geographic sub-region

- Seasonality

Approach and Data Parameters

National Mango Board Custom Hierarchy

- The analysis primarily examines and compares mango performance for the 2017 and 2016 calendar years, unless otherwise noted.
- Whole mango volume is measured in units, for those retailers who sell mangos by the pound, a conversion rate is used – 1 lb. = 1 unit.
- Fresh Cut Mango includes mango products that are sold in a fresh-cut pack that is only mango, no other items.
- Because of the variation in fresh cut unit size, this report is focused on dollar sales for fresh-cut mango, rather than volume.

About the Nielsen Perishables Group, FreshFacts®, Data Set

- The summary represents retail data from grocery store chains and box stores that partner with Nielsen Perishables Group, and have more than $2 million annual sales/store. This data reflects approximately 70% of total sales and encompasses roughly 18,000 stores nationwide.
- The data represents fruit sold in the produce department including UPC, PLU and system-2 coded items packaged in store.