MANGO MARKET DEVELOPMENT INDEX REPORT

2015-2016

UNDERSTANDING THE MARKET INDEX

- The Mango Market Development Index is designed to measure and compare mango sales volume relative to population by region and market

- The index system allows for easy comparisons

  - The national/total U.S. index is 100

  - An index greater than 120 represents a significant above-average mango performance – these are show in blue throughout the report

  - An index less than 80 represents a significant below-average mango performance – these are shown in red throughout the report

  - An index between 81 and 119 represents mango performance that is comparable to the U.S. average – these are shown in black throughout the report

2016 MANGO INDEX BY U.S. SUB-REGIONS – VOLUME
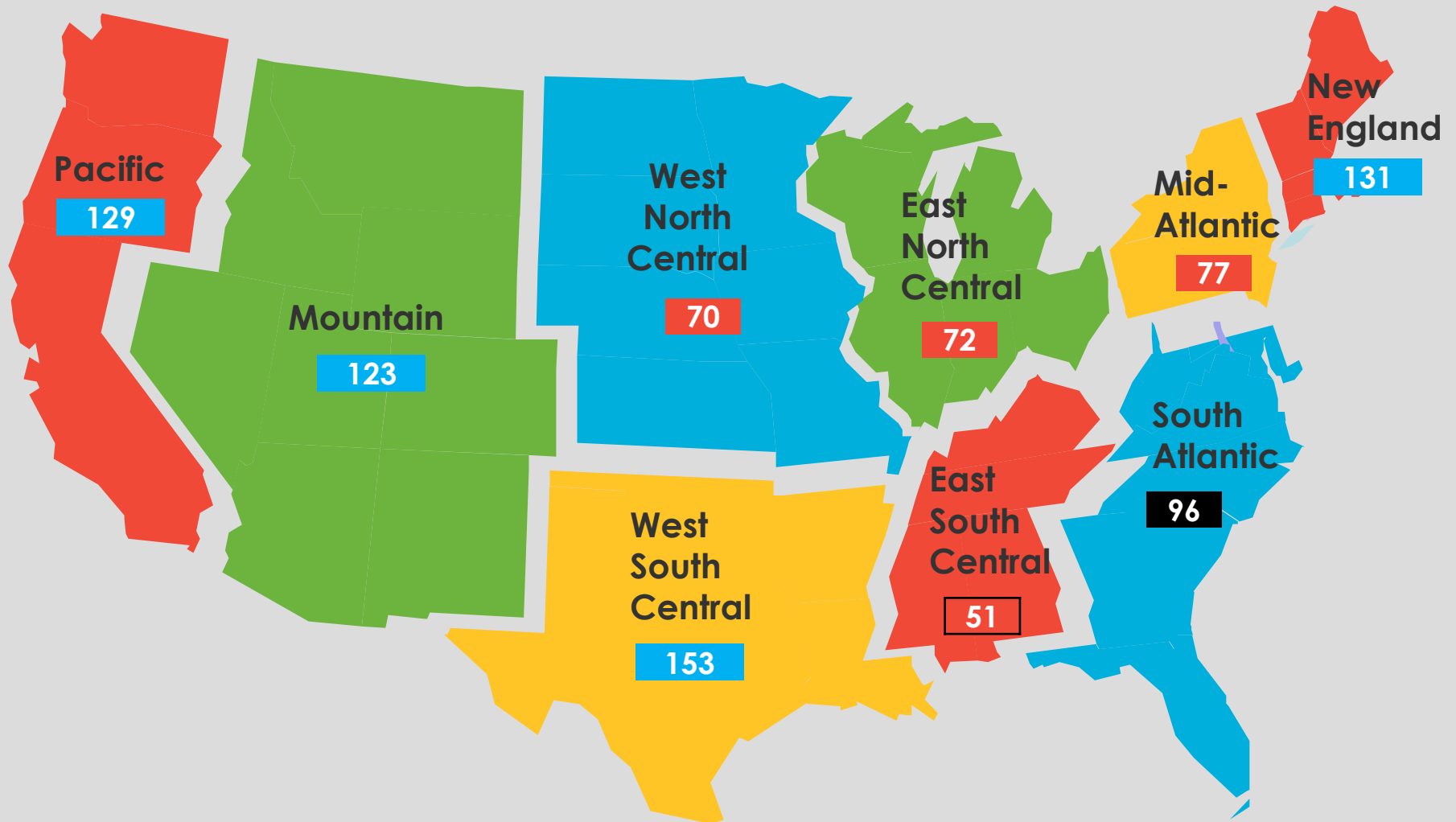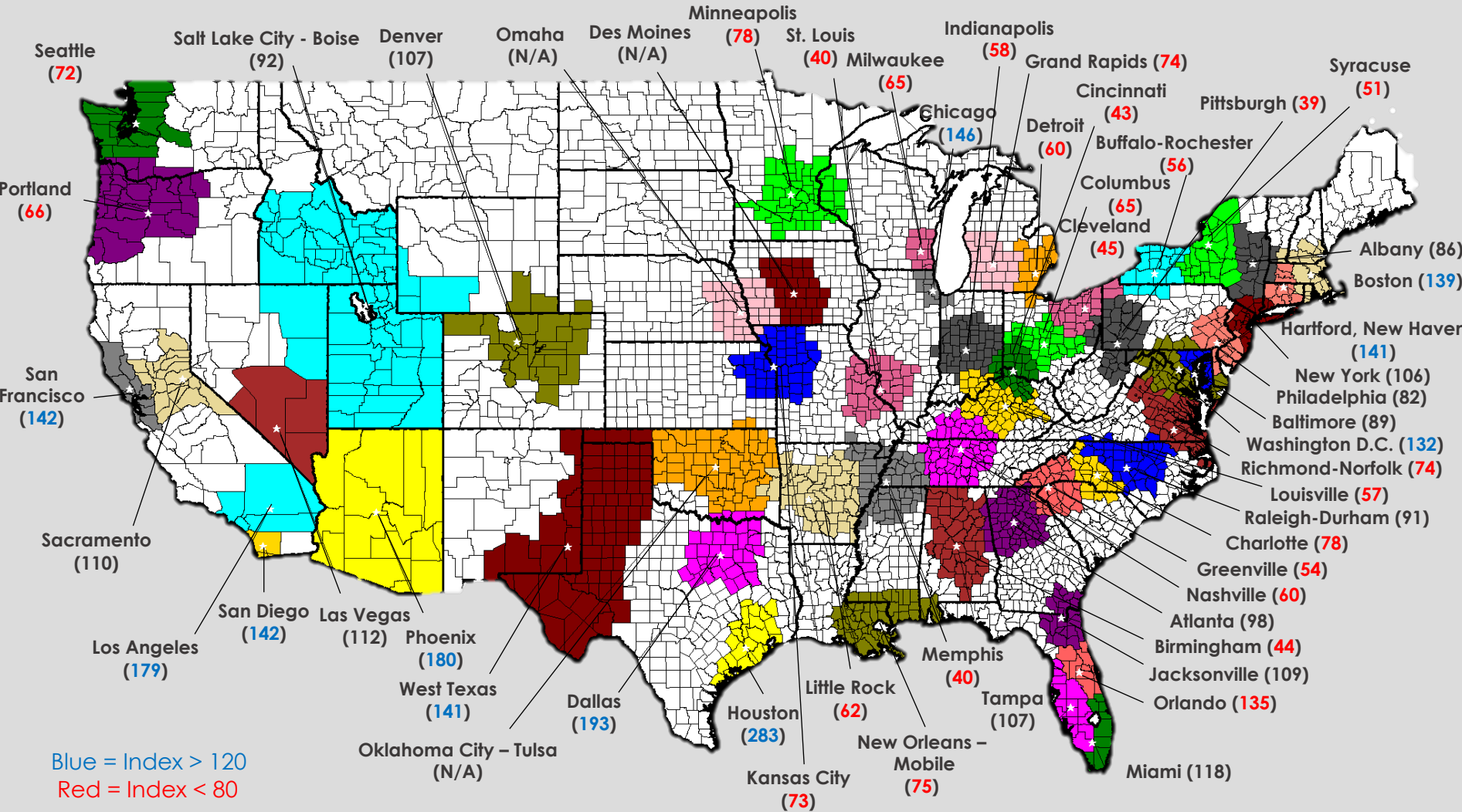
REGIONAL MANGO VOLUME INDEX CHANGE

- The West South Central sub-region topped the list, indexing 153

- Growth opportunities include the East South Central (51), West North Central (70), East North Central (72), and Mid-Atlantic (77) sub-regions, each indexing below 80

- In 2016, five of the nine sub-regions showed an increase from 2015

  - Largest growth in the West South Central (+13) and New England sub-regions (+9)

  - Largest declines in the Pacific (-10) and Mountain (-4) sub-regions

Market	2016 Index	2015 Index	Change
West South Central Sub-Region	153	140	+13
New England Sub-region	131	122	+9
Pacific Sub-region	129	139	-10
Mountain Sub-region	123	127	-4
South Atlantic Sub-region	96	99	-3
Mid Atlantic Sub-region	77	75	+2
East North Central Sub-region	72	72	0
West North Central Sub-region	70	67	+3
East South Central Sub-region	51	49	+2

Blue = Index > 120
Red = Index < 80

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Sources: Perishables Group FreshFacts® powered by Nielsen and the U.S. Census Bureau

NIELSEN TOTAL U.S. SCANTRACK® MARKETS

Seattle (72)
Salt Lake City - Boise (92)
Denver (107)
Omaha (N/A)
Des Moines (N/A)
Minneapolis (78)
St. Louis (40)
Milwaukee (65)
Indianapolis (58)
Grand Rapids (74)
Cincinnati (43)
Pittsburgh (39)
Syracuse (51)
Chicago (146)
Detroit (60)
Buffalo-Rochester (56)
Columbus (65)
Cleveland (45)
Albany (86)
Boston (139)
Portland (66)
Hartford, New Haven (141)
San Francisco (142)
New York (106)
Philadelphia (82)
Baltimore (89)
Washington D.C. (132)
Richmond-Norfolk (74)
Louisville (57)
Raleigh-Durham (91)
Charlotte (78)
Greenville (54)
Nashville (60)
Atlanta (98)
Birmingham (44)
Jacksonville (109)
Orlando (135)
Sacramento (110)
San Diego (142)
Las Vegas (112)
Phoenix (180)
Los Angeles (179)
West Texas (141)
Dallas (193)
Houston (283)
Oklahoma City – Tulsa (N/A)
Kansas City (73)
Little Rock (62)
Memphis (40)
New Orleans – Mobile (75)
Tampa (107)
Miami (118)

Blue = Index > 120
Red = Index < 80

N/A - Oklahoma City-Tulsa, Omaha, and Des Moines did not meet an adequate level of ACV coverage and therefore were not included.
Sources: Perishables Group FreshFacts® powered by Nielsen and the U.S. Census Bureau

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MANGO VOLUME INDEX BY 49 MARKETS

Market	2016 Index	Point Change From 2015
Total U.S.	100	
Houston	283	+42
Dallas	193	+20
Phoenix	180	-5
Los Angeles	179	-17
Chicago	146	-13
San Diego	142	-1
San Francisco	142	-4
West Texas	141	-22
Hartford-New Haven	141	+10
Boston	139	+11
Orlando	135	-8
Washington DC	124	-3

Market	2016 Index	Point Change From 2015
Total U.S.	100	
Miami	118	-12
Las Vegas	112	-21
Sacramento	110	-9
Jacksonville	109	+1
Tampa	107	-6
Denver	107	+12
New York	106	+10
Atlanta	98	0
Salt Lake City-Boise	92	-17
Raleigh-Durham	91	+3
Baltimore	89	-1
Albany	86	-2
Philadelphia	82	+2

Market	2016 Index	Point Change From 2015
Total U.S.	100	
Minneapolis	78	+2
Charlotte	78	+4
New Orleans-Mobile	75	+1
Richmond-Norfolk	74	-9
Grand Rapids	74	+2
Kansas City	73	+2
Seattle	72	+3
Portland OR	66	+5
Columbus	65	+5
Milwaukee	65	+7
Little Rock	62	+2
Nashville	60	+4
Detroit	60	+4
Indianapolis	58	+5
Louisville	57	+3
Buffalo-Rochester	56	-3
Greenville	54	+8
Syracuse	51	-2
Cleveland	45	-1
Birmingham	44	0
Cincinnati	43	-1
Memphis	40	-2
St Louis	40	-9
Pittsburgh	39	-4

Blue = Index > 120
Red = Index < 80

Sources: Perishables Group FreshFacts® powered by Nielsen and the U.S. Census Bureau

MANGO VOLUME INDEX CHANGE BY MARKET

- 7 of the 12 strongly over-performing markets are located in Texas, California or Arizona, traditionally strong areas for mangos

- 24 markets showed an increase in growth and two markets remained steady from the prior year

  - Houston had the greatest increase (42 points), reaching an index of 283 and demonstrating an opportunity for continued growth in a developed area

- 23 markets showed declines in growth, with five markets declining more than 10 points – West Texas, Las Vegas, Los Angeles, Salt Lake City-Boise, Chicago, Miami

  - West Texas had the greatest decrease at 22 points, but remains an above-average market at 141

METHODOLOGY & DEFINITIONS

- Data and analysis is provided by Nielsen Perishables Group using its proprietary FreshFacts® data set as well as U.S. census population data to achieve development indexing

- The 2016 index time period was 52 weeks ending 12/31/2016; the 2015 index time period was 52 weeks ending 1/2/2016

- Nielsen Perishables Group compiled category index figures for 49 out of the 52 ScanTrack Markets. Oklahoma City-Tulsa, Omaha, and Des Moines did not meet an adequate level of ACV coverage and therefore were not included.

- Category Development Index (CDI) is the relationship between unit sales of the population of an area for all products in the category

- CDI Calculation = (Geography Category Unit Sales / Geography Population) / (National Category Unit Sales / National Population)