



Mango Market Development Index

2016-2017

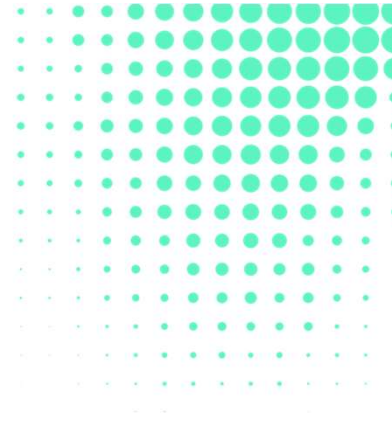


Understanding the Market Index

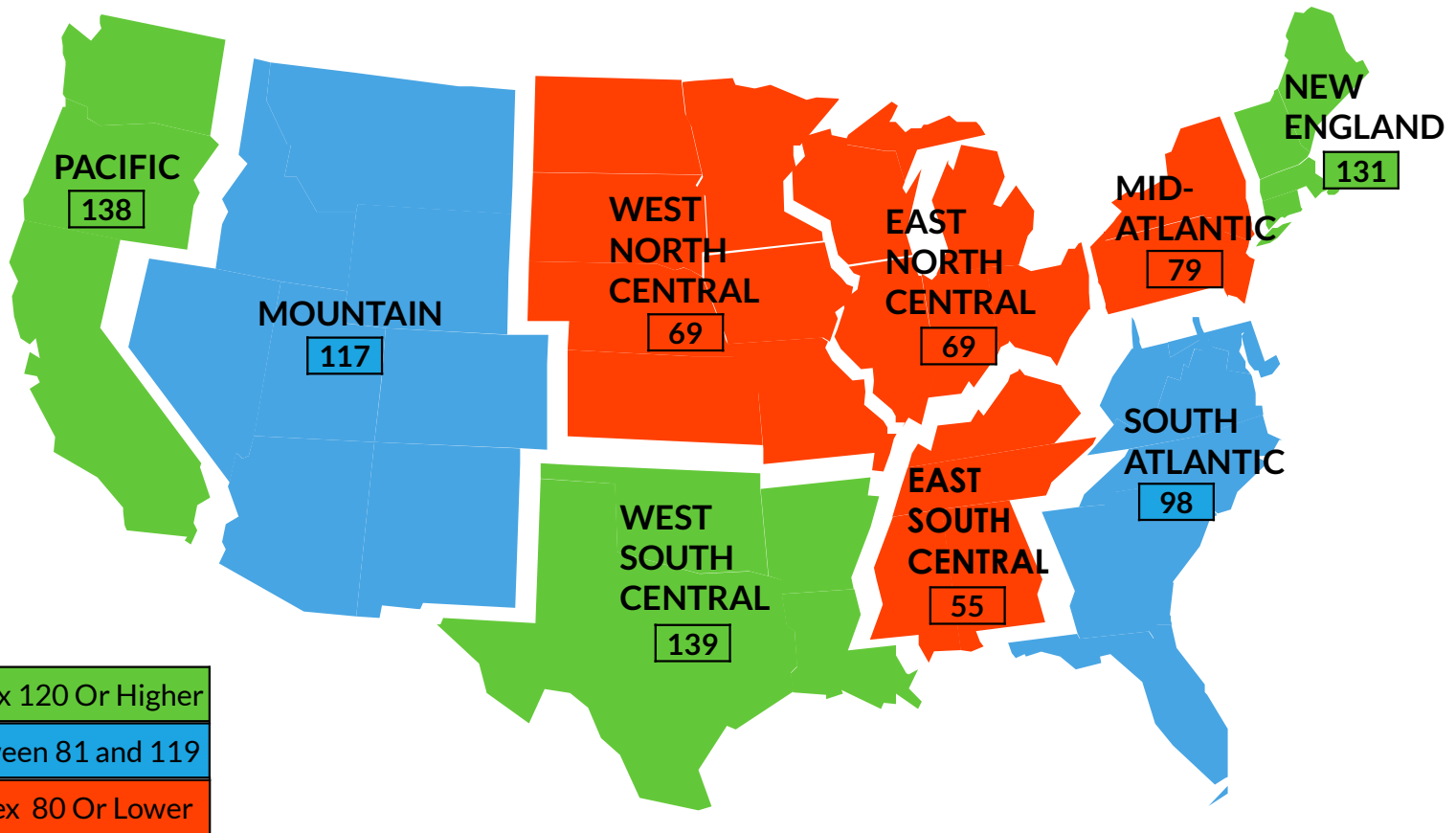
The Mango Market Development Index is designed to measure and compare mango volume sold at retail relative to population by region and market

The index system allows for easy comparisons

- The national/total US index is 100
- An index greater than 120 represents a significant above-average mango performance - These are depicted in **GREEN** throughout the report
- An index less than 80 represents a significant below-average mango performance - These are depicted in **BLUE** throughout the report
- An index between 81-119 represents mango performance that is comparable to the US average - these are shown in **RED** throughout the report



Mango Index by US Sub-Region - Volume



Above Average Index 120 Or Higher
Average Index Between 81 and 119
Below Average Index 80 Or Lower



Sources: Nielsen FreshFacts® (52 weeks ending 12/30/17) and the U.S. Census Bureau

Regional Mango Volume Index

The West South Central and Pacific sub-regions topped the list, indexing 139 and 138 respectively

- Growth opportunities include the East South Central (55), East North Central (69), West North Central (69), and Mid-Atlantic (79)
- In 2017, four of the nine sub-regions showed an increase from 2016
 - Largest growth was in the Pacific (+9) sub-region
 - Largest decline was in the West South Central (-13) sub-region

Mango Sub-Region Market Index - Volume

SUB-REGION	2017 INDEX	2016 INDEX	CHANGE
West South Central	139	152	- 13
Pacific	138	129	+ 9
New England	131	131	+ 0
Mountain	117	123	- 6
South Atlantic	98	96	+ 2
Mid-Atlantic	79	77	+ 2
West North Central	69	69	+ 0
East North Central	69	72	- 3
East South Central	55	51	+ 4

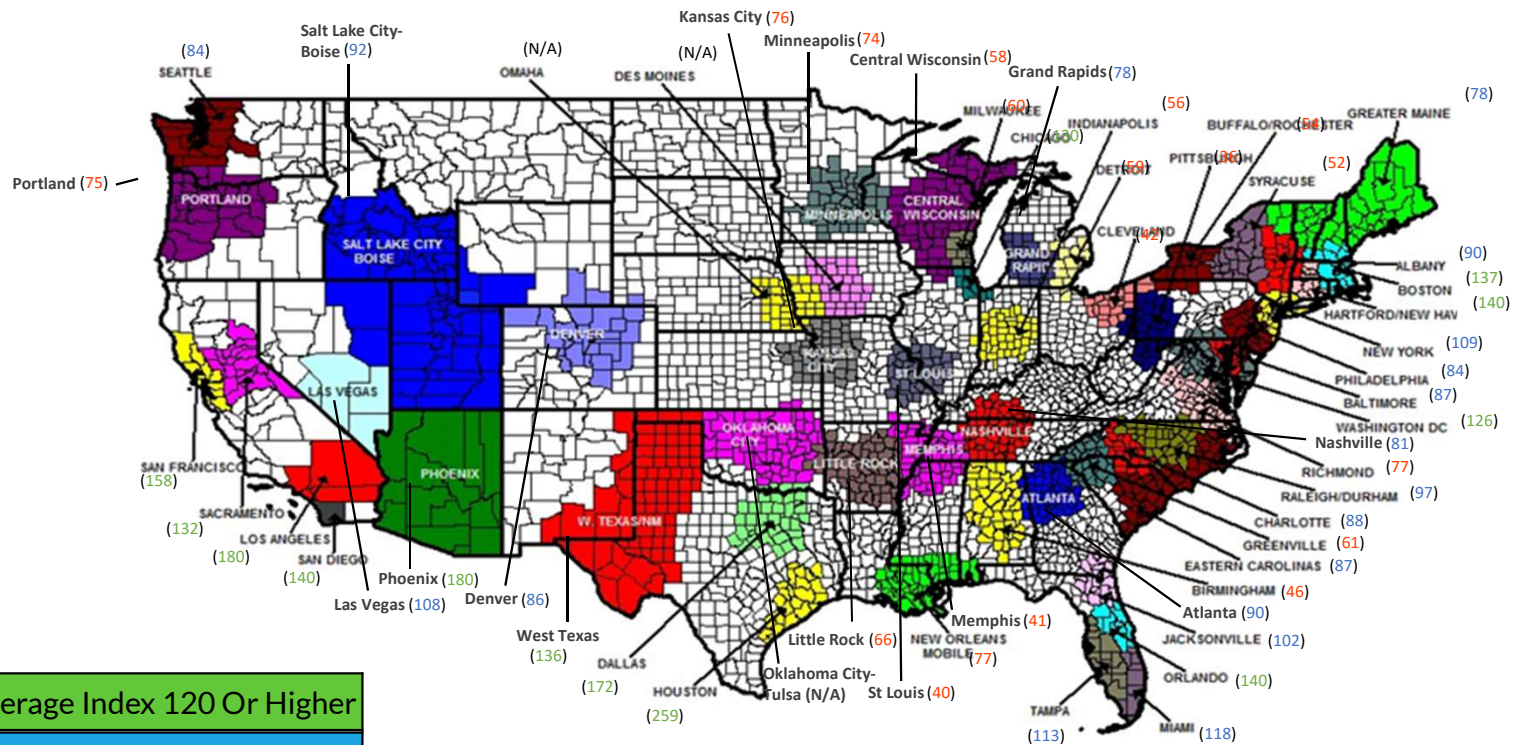
Above Average Index 120 Or Higher

Average Index Between 81 and 119

Below Average Index 80 Or Lower

Sources: Nielsen FreshFacts® (52 weeks ending 12/30/17) and the U.S. Census Bureau

Nielsen Total US ScanTrack® Markets



Above Average Index 120 Or Higher
 Average Index Between 81 and 119
 Below Average Index 80 Or Lower



Sources: Nielsen FreshFacts® (52 weeks ending 12/30/17) and the U.S. Census Bureau

Mango Volume Index Change by Market

The top six over-performing markets are located in Texas, California or Arizona, traditionally strong areas for mangos

28 markets showed an increase in growth and four markets remained steady from prior year

- Sacramento (132) and Nashville (81) had the greatest increase, 22 and 20 points respectively, demonstrating an opportunity for continued development

17 markets showed declines in growth with the top market, Houston, declining the most (-24 points)

- Two other over-performing markets showed substantial declines in market index: Dallas (-22 points) and Chicago (-16 points)



Mango Index by US Sub-Region - Volume

MARKET	2017 INDEX	POINT CHANGE
Total U.S.	100	
Houston	259	-24
Phoenix	180	0
Los Angeles	180	+1
Dallas	172	-22
San Francisco	158	+16
San Diego	140	-2
Orlando	140	+5
Hartford-New Haven	140	-1
Boston	137	-1
West Texas	136	-5
Sacramento	132	+22
Chicago	130	-16
Washington DC	126	+2

MARKET	2017 INDEX	POINT CHANGE
Total U.S.	100	
Miami	118	0
Tampa	113	+6
New York	109	+3
Las Vegas	108	-4
Jacksonville	102	-7
Raleigh-Durham	97	+7
Salt Lake City-Boise	92	0
Albany	90	+4
Atlanta	90	-9
Charlotte	88	+11
Baltimore	87	-1
Eastern Carolinas	87	+9
Denver	86	-20
Seattle	84	+13
Philadelphia	84	+2
Nashville	81	+20

MARKET	2017 INDEX	POINT CHANGE
Total U.S.	100	
Greater Maine	78	+8
Grand Rapids	78	+4
Richmond-Norfolk	78	+5
New Orleans-Mobile	75	+2
Kansas City	74	+4
Portland OR	74	+9
Minneapolis	73	-4
Little Rock	72	+4
Greenville	66	+7
Milwaukee	65	+7
Detroit	65	0
Central Wisconsin	62	+7
Indianapolis	60	-2
Buffalo-Rochester	60	-2
Syracuse	57	+1
Birmingham	56	+2
Cleveland	54	-2
Memphis	51	+1
St Louis	45	+1
Pittsburgh	39	-3

Above Average Index 120 Or Higher

Average Index Between 81 and 119

Below Average Index 80 Or Lower



Sources: Nielsen FreshFacts® (52 weeks ending 12/30/17) and the U.S. Census Bureau

Methodology and Definitions

Data and analysis provided my Nielsen using FreshFacts® database as well as US census population data to achieve development indexing

Nielsen 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 category

- $CDI \text{ Calculation} = (\text{Geography Category Unit Sales} / \text{Geography Population}) / (\text{National Category Unit Sales} / \text{National Population})$